

NAAN MUDHALVAN
SALESFORCE DEVELOPER PROJECT REPORT

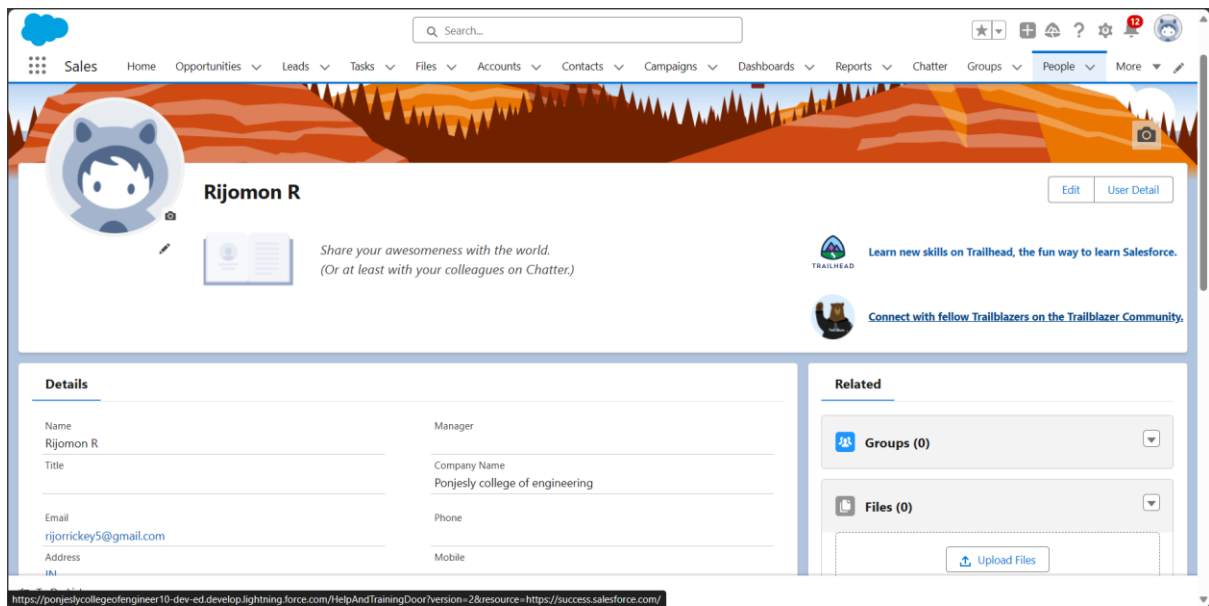
PROJECT TITLE: COSMETICS STORE MANAGEMENT

COLLEGE: PONJESLY COLLEGE OF ENGINEERING.

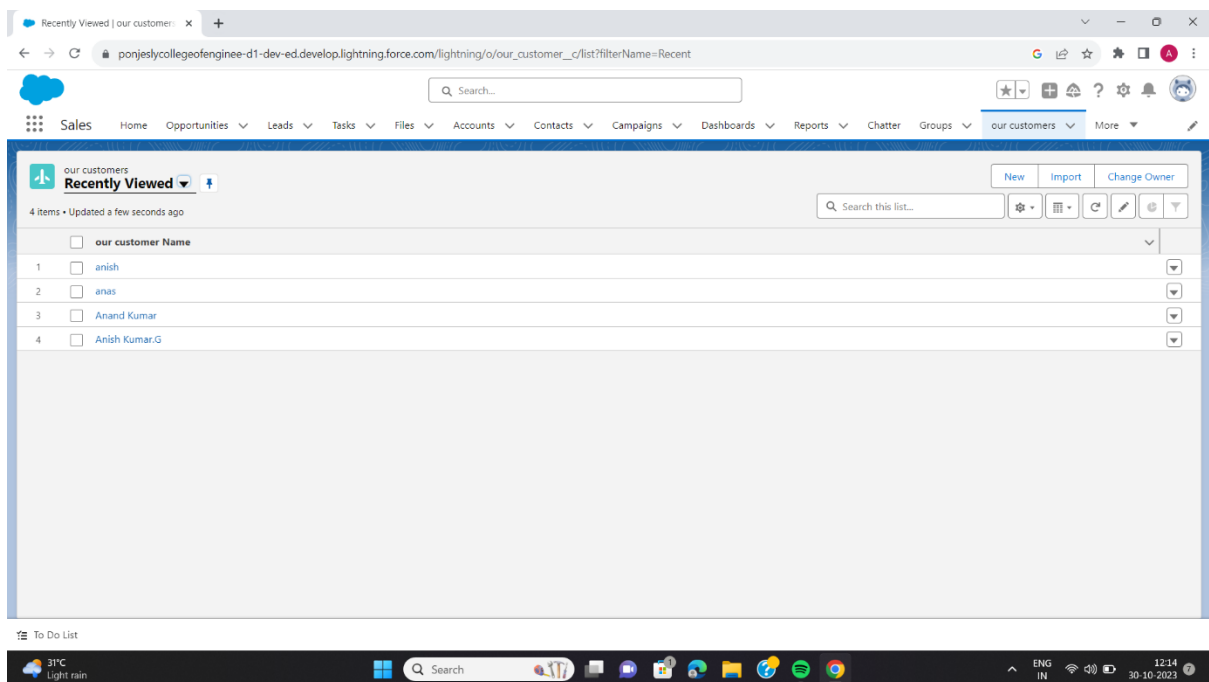
BATCH – 12

NAME	NM ID	REG NO
RIJO MON.R	82C9CD526F0548697D1429D4AD183105	961820114058

STEP 1 : Create a Salesforce Account



STEP 2 : Create the Objects(The consultants,The retailers,The others)



Recently Viewed | consultants | x

ponjeslycollegeofengineer-d1-dev-ed.develop.lightning.force.com/lightning/o/consultants_c/list?filterName=Recent

Search...

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups consultants More

consultants Recently Viewed

4 items • Updated a few seconds ago

Search this list...

consultants Name

1	<input type="checkbox"/>	anish kumar	
2	<input type="checkbox"/>	anish s	
3	<input type="checkbox"/>	anand kumar	
4	<input type="checkbox"/>	anas	

To Do List

31°C Light rain

Search

ENG IN 12:15 30-10-2023

Recently Viewed | retailers | Sal | x

ponjeslycollegeofengineer-d1-dev-ed.develop.lightning.force.com/lightning/o/retailers_c/list?filterName=Recent

Search...

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups retailers More

retailers Recently Viewed

4 items • Updated a few seconds ago

Search this list...

retailers Name

1	<input type="checkbox"/>	anish kumar	
2	<input type="checkbox"/>	anish s	
3	<input type="checkbox"/>	anand kumar	
4	<input type="checkbox"/>	anas	

To Do List

31°C Light rain

Search

ENG IN 12:15 30-10-2023

STEP 3 : Field and Relationship

Home | Salesforce x our customer | Salesforce x +

ponjeslycollegeofenginee-d1-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/015g000004Xf09/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
our customer

Details

Fields & Relationships
8 Items, Sorted by Field Label

Q Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
customer id	customer_id__c	Auto Number		
Email Id	Email_Id__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
our customer Name	Name	Text(80)		✓
Owner	OwnerId	Lookup(User,Group)		✓
phone number	phone_number__c	Number(10, 0)		

29°C Partly sunny

Search

ENG IN 12:18 30-10-2023

Home | Salesforce x retailers | Salesforce x +

ponjeslycollegeofenginee-d1-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/015g000004Xf09/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
retailers

Details

Fields & Relationships
8 Items, Sorted by Field Label

Q Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
customer id	customer_id__c	Auto Number		
customer name	customer_name__c	Text(12)		
email id	email_id__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
mobile number	mobile_number__c	Phone		
Owner	OwnerId	Lookup(User,Group)		✓
retailers Name	Name	Text(80)		✓

29°C Partly sunny

Search

ENG IN 12:18 30-10-2023

Home | Salesforce | our customer | Salesforce | +

ponjeslycollegeofengineer-d1-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/015g000004Xf09/FieldsAndRelationships/view

Search Setup

Setup | Home | Object Manager

SETUP > OBJECT MANAGER
our customer

Details

Fields & Relationships
8 Items, Sorted by Field Label

Quick Find | New | Deleted Fields | Field Dependencies | Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
customer id	customer_id__c	Auto Number		
Email Id	Email_id__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
our customer Name	Name	Text(80)		✓
Owner	OwnerId	Lookup(User,Group)		✓
phone number	phone_number__c	Number(10, 0)		

29°C Partly sunny | Search | ENG IN | 12:18 30-10-2023

STEP 4 : Create The Lightning App

Home | Salesforce | Lightning Usage | Salesforce | Optimizer | Salesforce | Org Metrics | Salesforce | Lightning Usage | Salesforce | Lightning Usage | Salesforce | +

ponjeslycollegeofengineer-d1-dev-ed.develop.lightning.force.com/lightning/page/usage?lua_tab=Active%20Licenses

Search...

Salesforce Optimizer | Org Metrics | Lightning Usage

ACTIVITY

- Lightning Experience
- Salesforce Mobile

USAGE

- Switches To Classic
- Browser
- Page
- Active Licenses**

SECURITY

- Login Metrics

Lightning Usage
Active Licenses

Usage

User Licenses by Profile
Up to Last 30 Days

Salesforce

0 0.05 0.1 0.15 0.2 0.25 0.3 0.35 0.4 0.45 0.5 0.55 0.6 0.65 0.7 0.75 0.8 0.85 0.9 0.95 1

Total

Contract Manager

Custom: Marketing Profile

Custom: Sales Profile

Custom: Support Profile

Marketing User

Minimum Access - Salesforce

Read Only

Solution Manager

Standard User

System Administrator

Assigned Licenses Active Licenses

1

29°C Partly sunny | Search | ENG IN | 12:24 30-10-2023

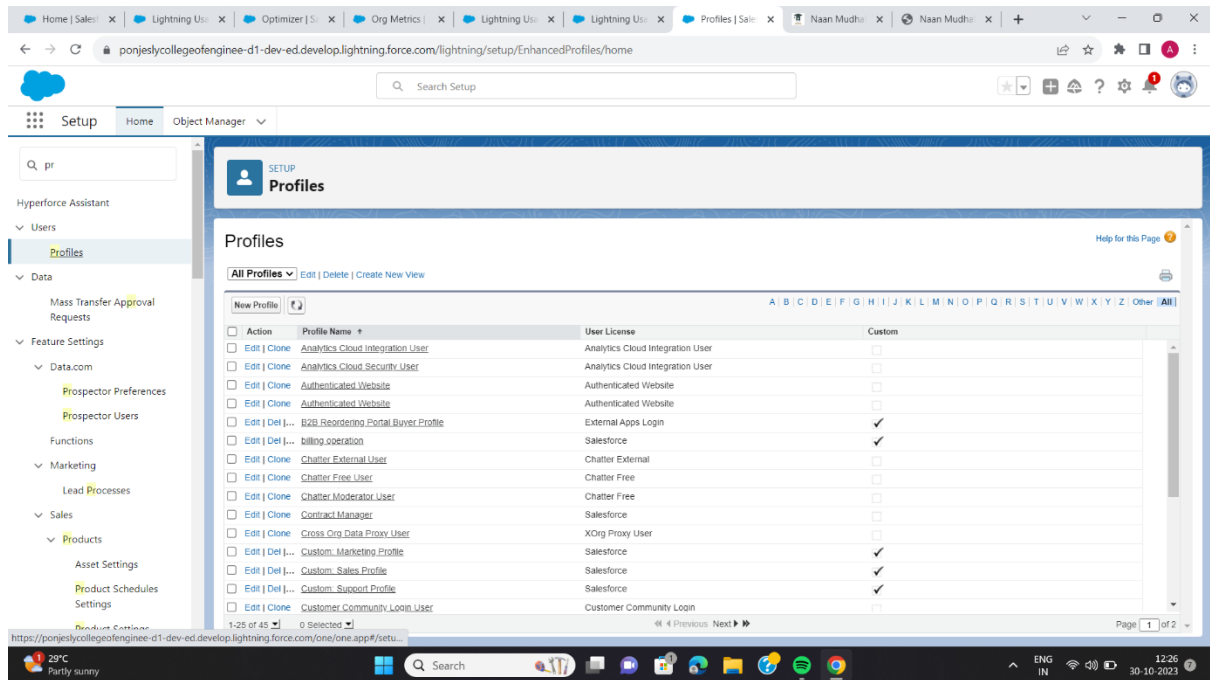
STEP 5 : Page Layout

The screenshot shows the Salesforce Setup interface for the 'consultants' object. The left sidebar lists various setup options, with 'Page Layouts' selected. The main area displays the 'consultants Layout' configuration. At the top, there are tabs for 'Save', 'Quick Save', 'Preview As...', 'Cancel', 'Undo', 'Redo', and 'Layout Properties'. Below these, a 'Fields' section lists available fields: Buttons, Quick Actions, Mobile & Lightning Actions, Expanded Lookups, Related Lists, and Report Charts. A 'Quick Find' field is present. The 'Fields' list includes 'Section', 'Blank Space', 'Created By', 'Customer Id', 'Last Modified By', 'address', 'customer name', 'Owner', 'consultants Name', and 'email id'. The 'consultants Sample' section shows a 'Highlights Panel' with a placeholder for customization. Below this, the 'Quick Actions in the Salesforce Classic Publisher' section explains that actions are inherited from the global publisher layout and can be overridden. The 'Salesforce Mobile and Lightning Experience Actions' section explains that actions are predefined by Salesforce and can be overridden. The bottom of the screen shows a Windows taskbar with a search bar and various application icons.

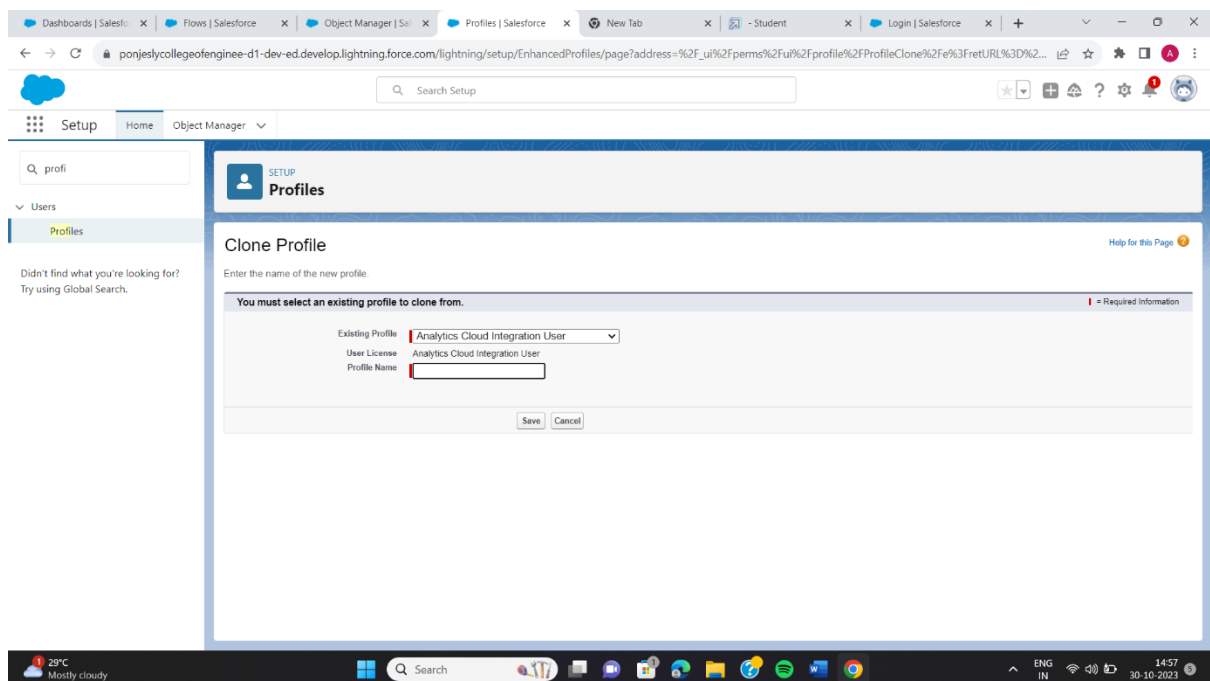
STEP 6 : Creating A Role

The screenshot shows the Salesforce Setup interface for the 'Roles' section. The left sidebar lists various setup options, with 'Roles' selected. The main area displays the 'Understanding Roles' page. At the top, there is a 'Sample Role Hierarchy' dropdown menu set to 'Territory-based Sample'. Below this, a diagram illustrates the hierarchy: 'Executive Staff' (CEO, President, CFO, VP Sales) at the top, followed by 'Western Sales Director', 'Eastern Sales Director', and 'International Sales Director'. Each director has a corresponding 'Sales Rep' role (e.g., CA Sales Rep, NY Sales Rep, MA Sales Rep, OR Sales Rep, Asian Sales Rep, European Sales Rep). To the right of the diagram, there are three boxes explaining the permissions for each level: 'View & edit data, roll up forecasts, & generate reports for all users below. Can't access data of other Executive Staff', 'View & edit data, roll up forecasts, & generate reports for all users directly below. Can't access data of users above or at same level', and 'View & edit data, roll up forecasts, & generate reports only for own data. Can't access data of users above or at same level'. At the bottom right, there are buttons for 'Set Up Roles' and 'Don't show this page again'. The bottom of the screen shows a Windows taskbar with a search bar and various application icons.

STEP 7 : Create the Profile



The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The left sidebar contains navigation options like 'Users', 'Data', 'Feature Settings', 'Marketing', 'Sales', and 'Products'. The main content area displays a table of profiles with columns for 'Action', 'Profile Name', 'User License', and 'Custom'. The table lists various profiles such as 'Analytics Cloud Integration User', 'Analytics Cloud Security User', 'Authenticated Website', 'B2B Reordering Portal Buyer Profile', 'billing.operation', 'Chatter External User', 'Chatter Free User', 'Chatter Moderator User', 'Contract Manager', 'Cross Org Data Proxy User', 'Custom Marketing Profile', 'Custom Sales Profile', 'Custom Support Profile', and 'Customer Community Login User'. The 'Custom' column has checkboxes for each profile, with some checked (e.g., 'External Apps Login', 'Salesforce', 'Salesforce', 'Salesforce', 'Customer Community Login').



The screenshot shows the 'Clone Profile' page in the Salesforce Setup interface. The page title is 'Clone Profile'. Below the title, there is a section titled 'You must select an existing profile to clone from.' which contains a dropdown menu for 'Existing Profile' and a text input field for 'Profile Name'. The 'Existing Profile' dropdown is set to 'Analytics Cloud Integration User'. The 'Profile Name' field is empty. Below these fields are 'Save' and 'Cancel' buttons. The left sidebar shows the 'Profiles' page selected under the 'Users' section.

STEP 8 : Create the Users

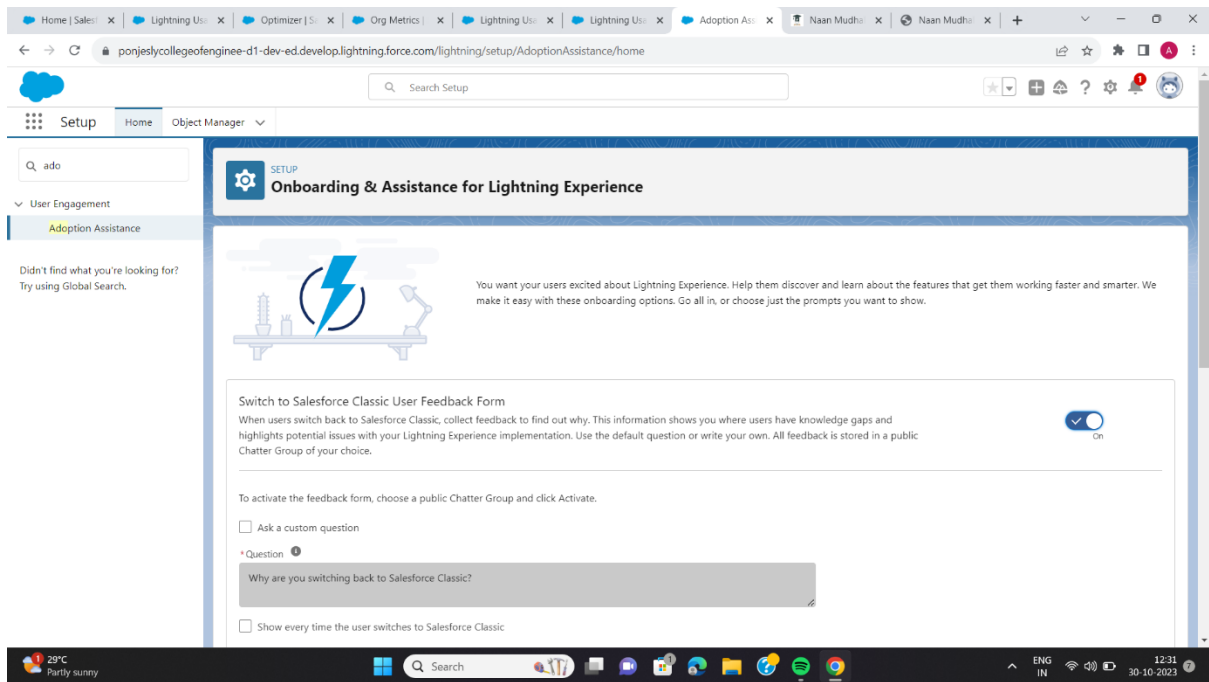
The screenshot shows the Salesforce Setup interface with the 'Users' section selected in the left sidebar. The main content area displays the 'All Users' page, which includes instructions on how to create, view, and manage users. Below the instructions, there is a table listing existing users. The table has columns for Action, Full Name, Alias, Username, Role, Active status, and Profile. Five users are listed: Chatter Expert, S. Anish, S. Anish, User Integration, and User Security. Each user has an 'Edit' link and a checkmark in the 'Active' column. The 'Profile' column lists the roles: Chatter Free User, System Administrator, store supervisor, Analytics Cloud Integration User, and Analytics Cloud Security User. At the bottom of the page, there is a Windows taskbar showing the date as 30-10-2023 and the time as 12:28.

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatty-00d5y0000007roleav-vzlj8h4bzv@chatter.salesforce.com		✓	Chatter Free User
Edit	S. Anish	AS	anish13422@nm.com		✓	System Administrator
Edit	S. Anish	AS	anish13422@nm.com	store head	✓	store supervisor
Edit	User Integration	integ	integration@00d5y0000007roleav.com		✓	Analytics Cloud Integration User
Edit	User Security	sec	insightsecurity@00d5y0000007roleav.com		✓	Analytics Cloud Security User

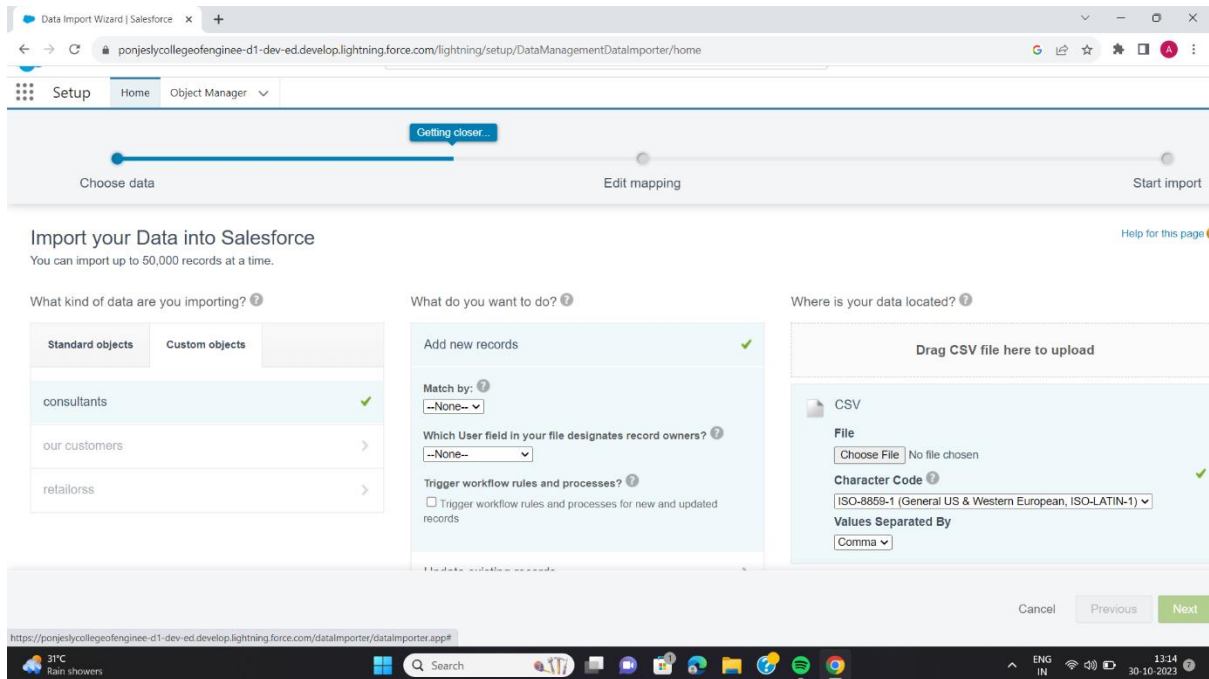
This screenshot is identical to the one above, showing the Salesforce Setup - Users page. It displays the 'All Users' section with a table of five users: Chatter Expert, S. Anish, S. Anish, User Integration, and User Security. The interface includes a left sidebar with navigation options, a top search bar, and a Windows taskbar at the bottom indicating the date 30-10-2023 and time 12:28.

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatty-00d5y0000007roleav-vzlj8h4bzv@chatter.salesforce.com		✓	Chatter Free User
Edit	S. Anish	AS	anish13422@nm.com		✓	System Administrator
Edit	S. Anish	AS	anish13422@nm.com	store head	✓	store supervisor
Edit	User Integration	integ	integration@00d5y0000007roleav.com		✓	Analytics Cloud Integration User
Edit	User Security	sec	insightsecurity@00d5y0000007roleav.com		✓	Analytics Cloud Security User

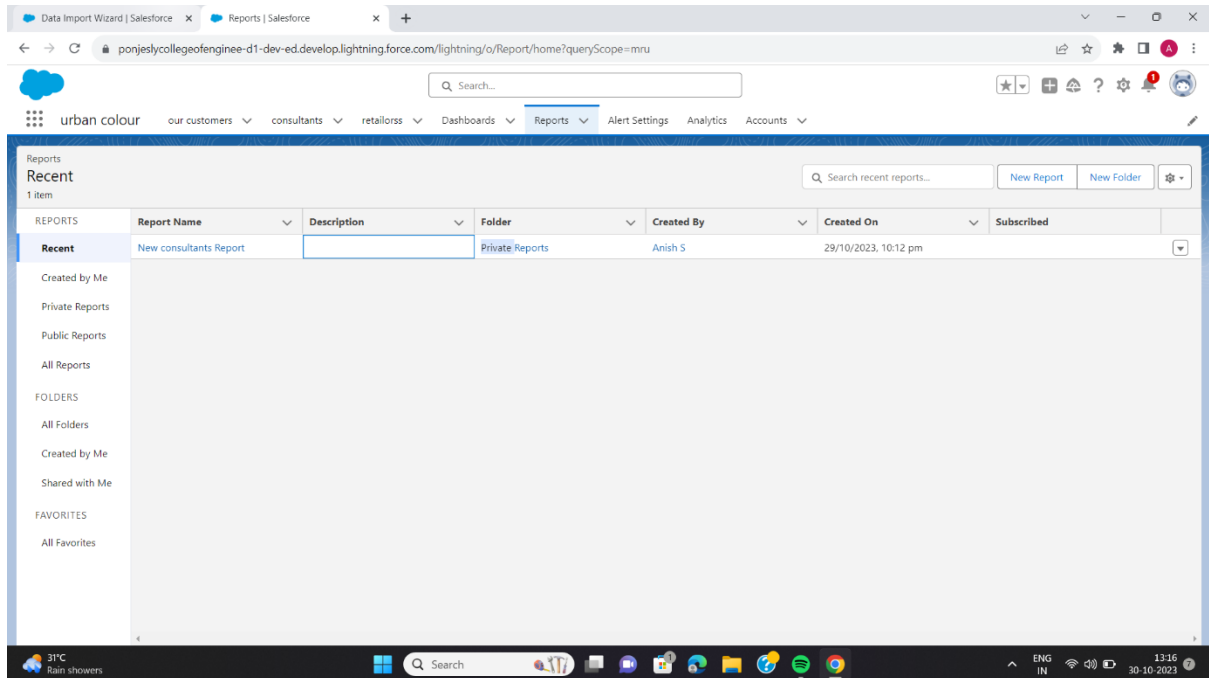
STEP 9 : Create User Adoption



STEP 10 : Data Import Wizard



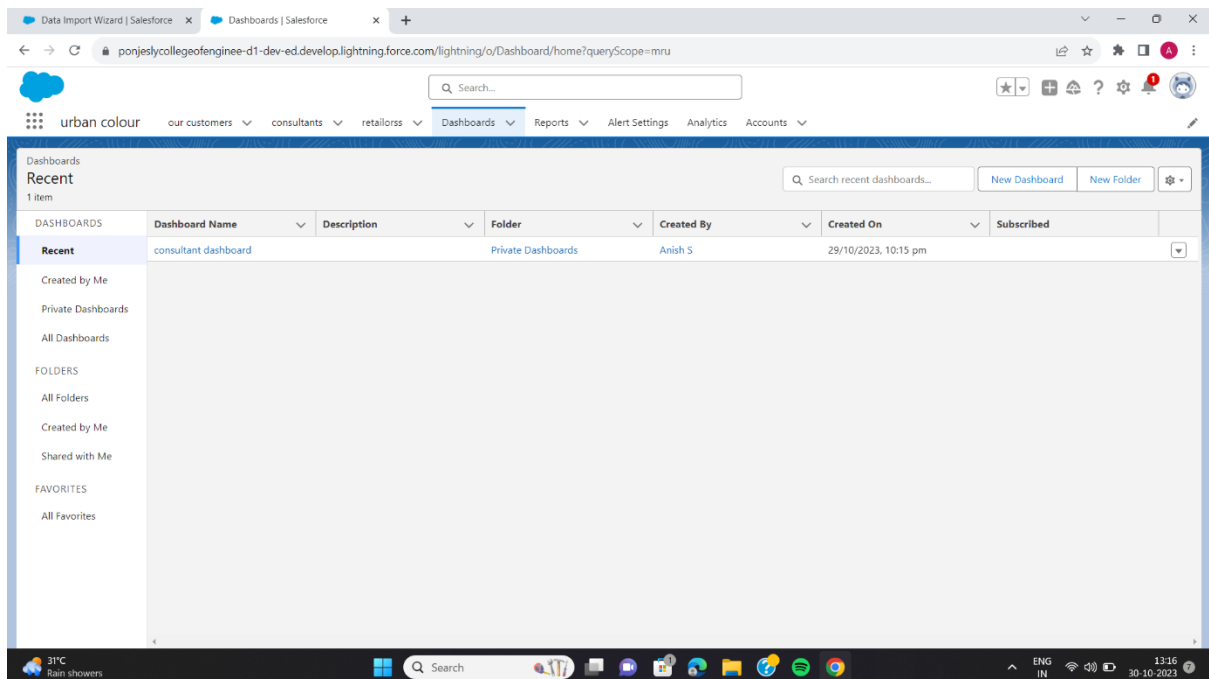
STEP 11 : Report In Salesforce



The screenshot shows the Salesforce Reports interface. The top navigation bar includes 'urban colour' and various menu items like 'our customers', 'consultants', 'retailors', 'Dashboards', 'Reports', 'Alert Settings', 'Analytics', and 'Accounts'. The 'Reports' section is active, displaying a table of recent reports. The table has columns for 'Report Name', 'Description', 'Folder', 'Created By', 'Created On', and 'Subscribed'. A single report is listed: 'New consultants Report' in the 'Private Reports' folder, created by 'Anish S' on '29/10/2023, 10:12 pm'. The left sidebar shows navigation options for 'Recent', 'Created by Me', 'Private Reports', 'Public Reports', 'All Reports', 'FOLDERS', 'All Folders', 'Created by Me', 'Shared with Me', 'FAVORITES', and 'All Favorites'. The bottom status bar shows the weather as '31°C Rain showers' and the time as '13:16 30-10-2023'.

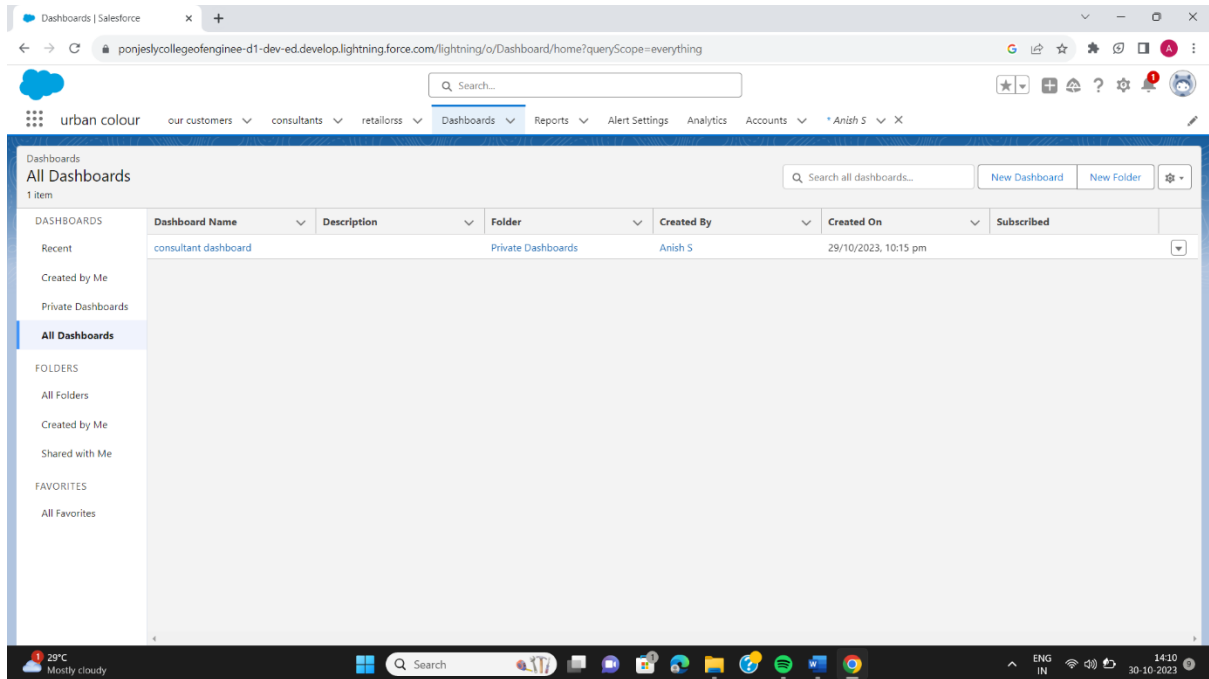
REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New consultants Report		Private Reports	Anish S	29/10/2023, 10:12 pm	

STEP 12 : Create Dashboard

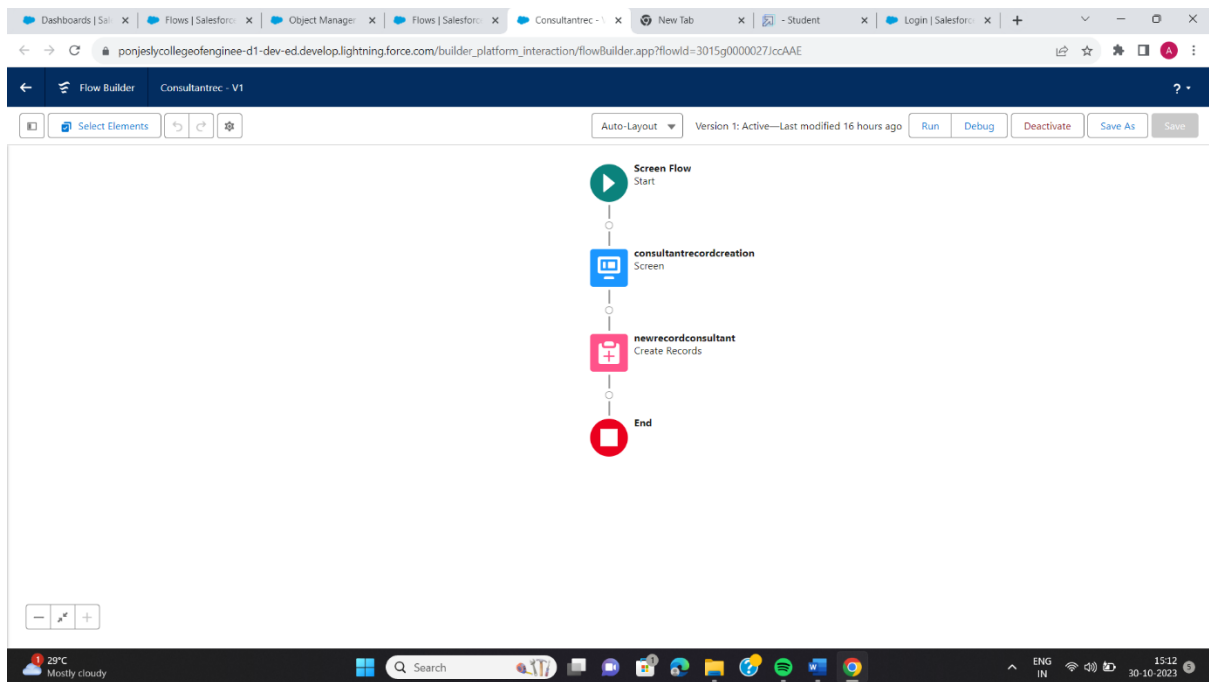


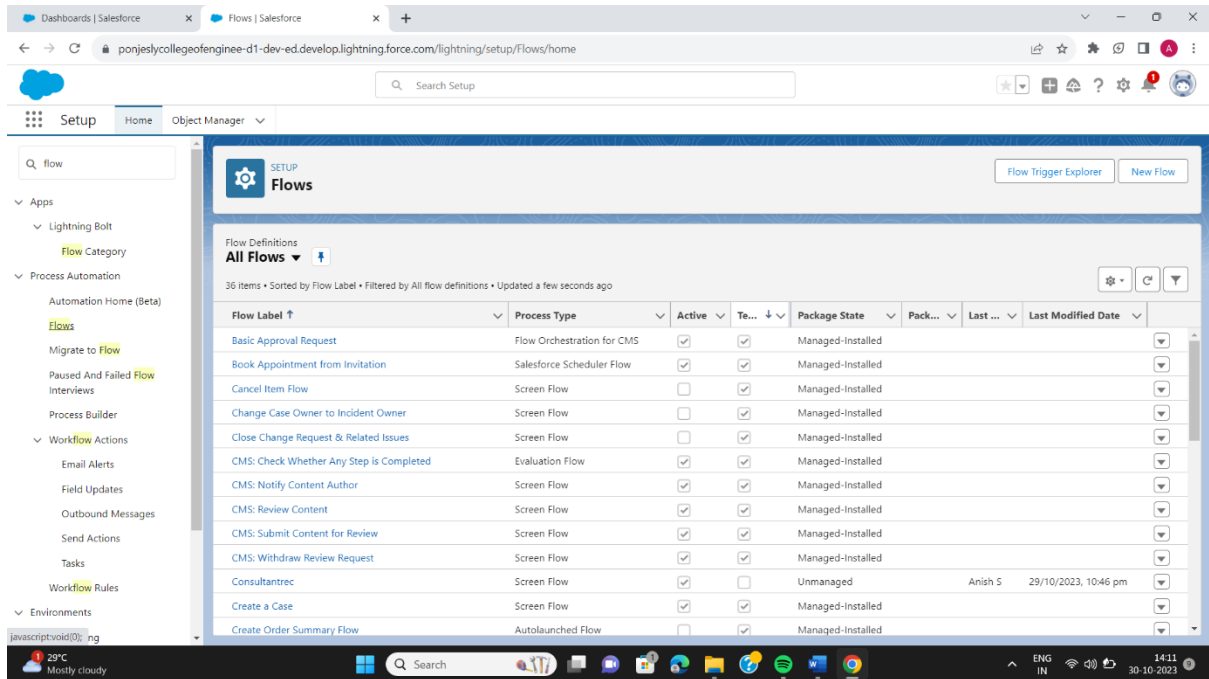
The screenshot shows the Salesforce Dashboards interface. The top navigation bar is similar to the previous step, with 'Dashboards' selected. The 'Dashboards' section displays a table of recent dashboards. The table has columns for 'Dashboard Name', 'Description', 'Folder', 'Created By', 'Created On', and 'Subscribed'. A single dashboard is listed: 'consultant dashboard' in the 'Private Dashboards' folder, created by 'Anish S' on '29/10/2023, 10:15 pm'. The left sidebar shows navigation options for 'Recent', 'Created by Me', 'Private Dashboards', 'All Dashboards', 'FOLDERS', 'All Folders', 'Created by Me', 'Shared with Me', 'FAVORITES', and 'All Favorites'. The bottom status bar shows the weather as '31°C Rain showers' and the time as '13:16 30-10-2023'.

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	consultant dashboard		Private Dashboards	Anish S	29/10/2023, 10:15 pm	



STEP 13 : Create a Flow





Step:14 : Create Triggers

