

**NAAN MUDHALVAN**  
**SALESFORCE DEVELOPER PROJECT REPORT**

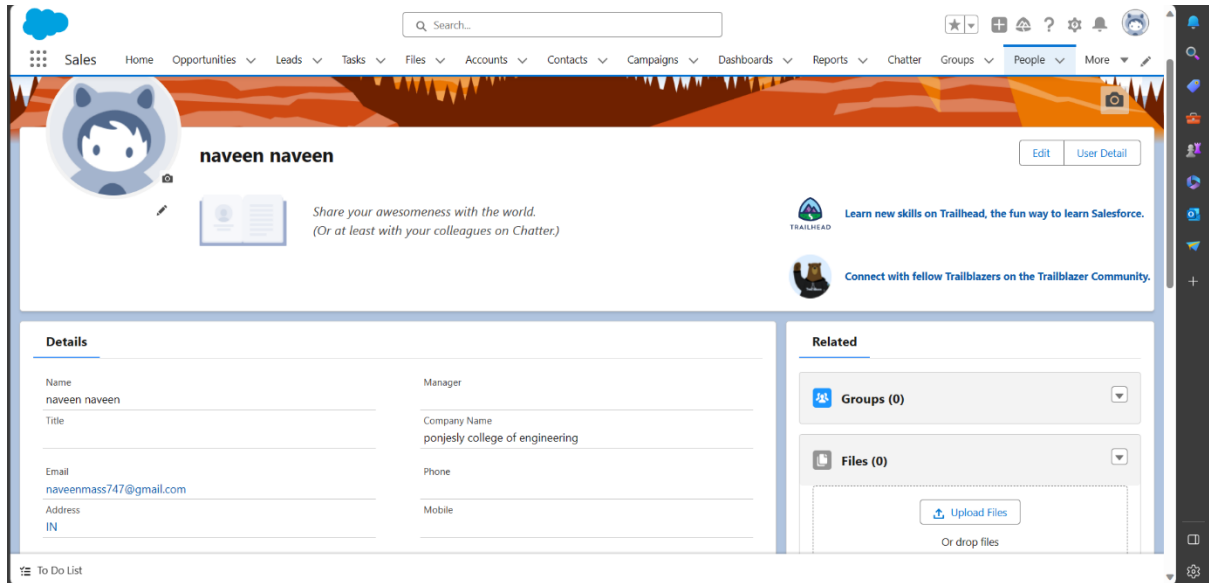
**PROJECT TITLE:** COSMETICS STORE MANAGEMENT

**COLLEGE:** PONJESLY COLLEGE OF ENGINEERING.

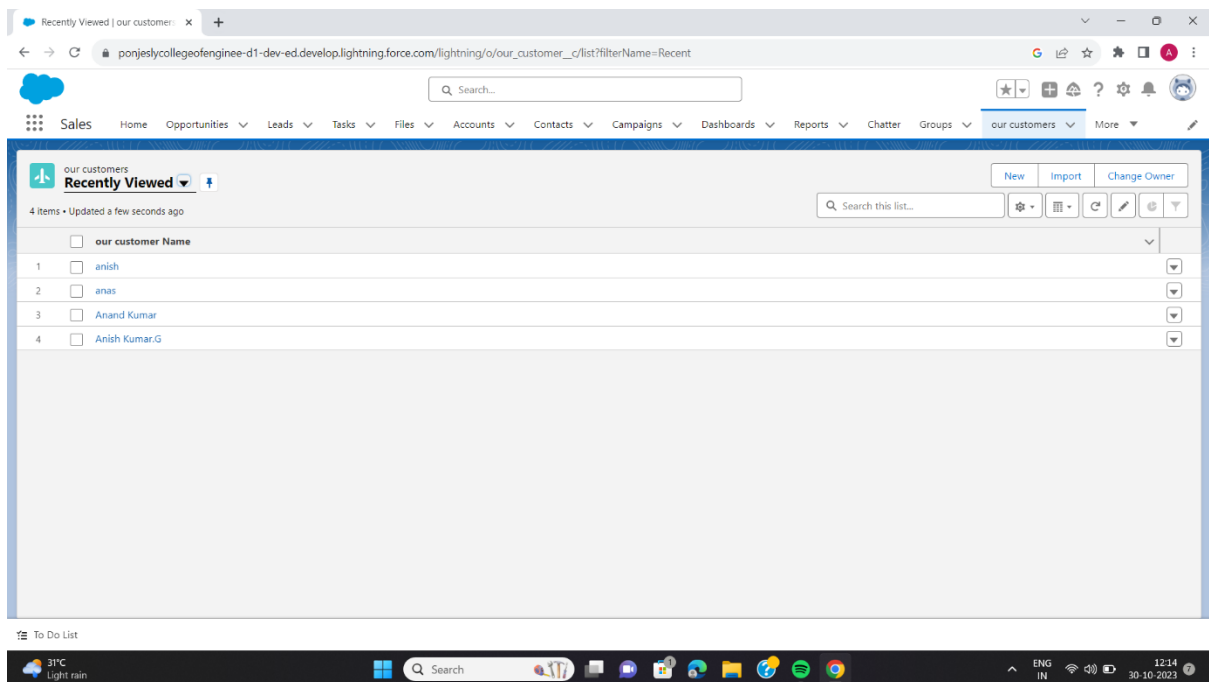
BATCH – 12

NAME	NM ID	REG NO
NAVEEN.V	B905F4DE158469AB80F4DD3B70EC74DF	961820114051

## 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 +

ponjeslycollegeofengineer-d1-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115g000004Xf09/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 12:18 30-10-2023

Home | Salesforce x retailers | Salesforce x +

ponjeslycollegeofengineer-d1-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115g000004Xf0s/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

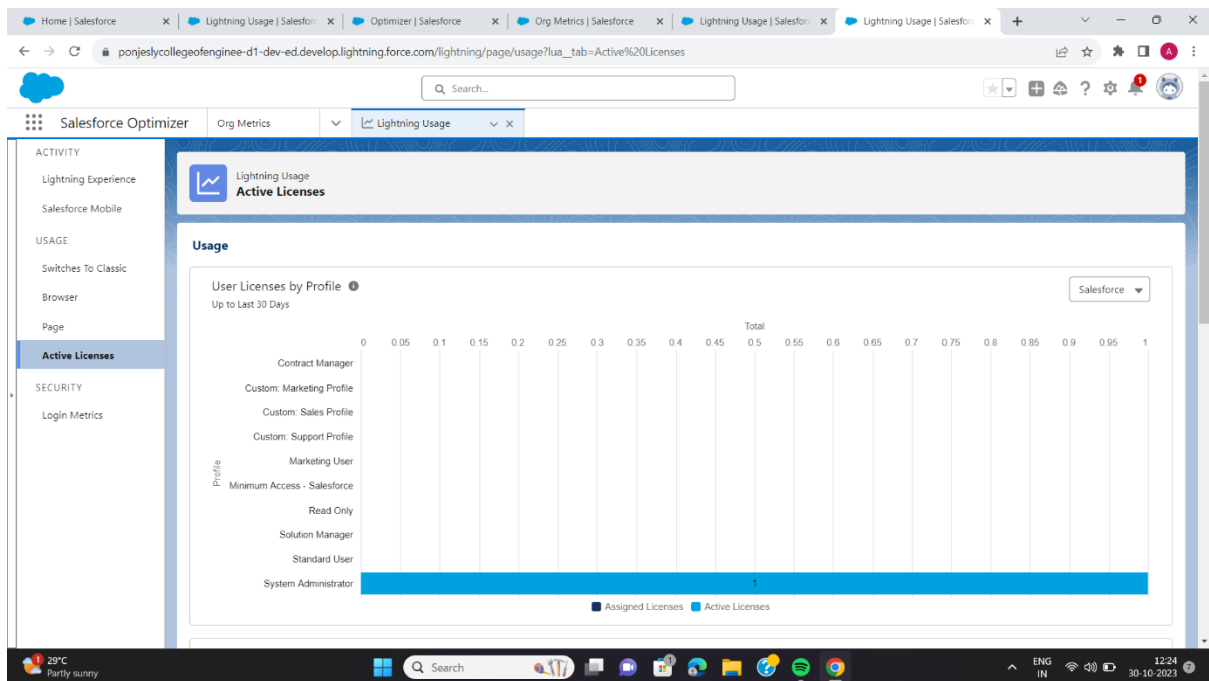
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
customer id	customer_id__c	Auto Number		
customer name	customer_name__c	Text(12)		
email id	email_id__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
mobile number	mobile_number__c	Phone		
Owner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

29°C Partly sunny 12:18 30-10-2023

The screenshot shows the Salesforce Setup interface for the 'our customer' object. The 'Fields & Relationships' section is active, displaying a table of 8 fields. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status.

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)		

## STEP 4 : Create The Lightning App



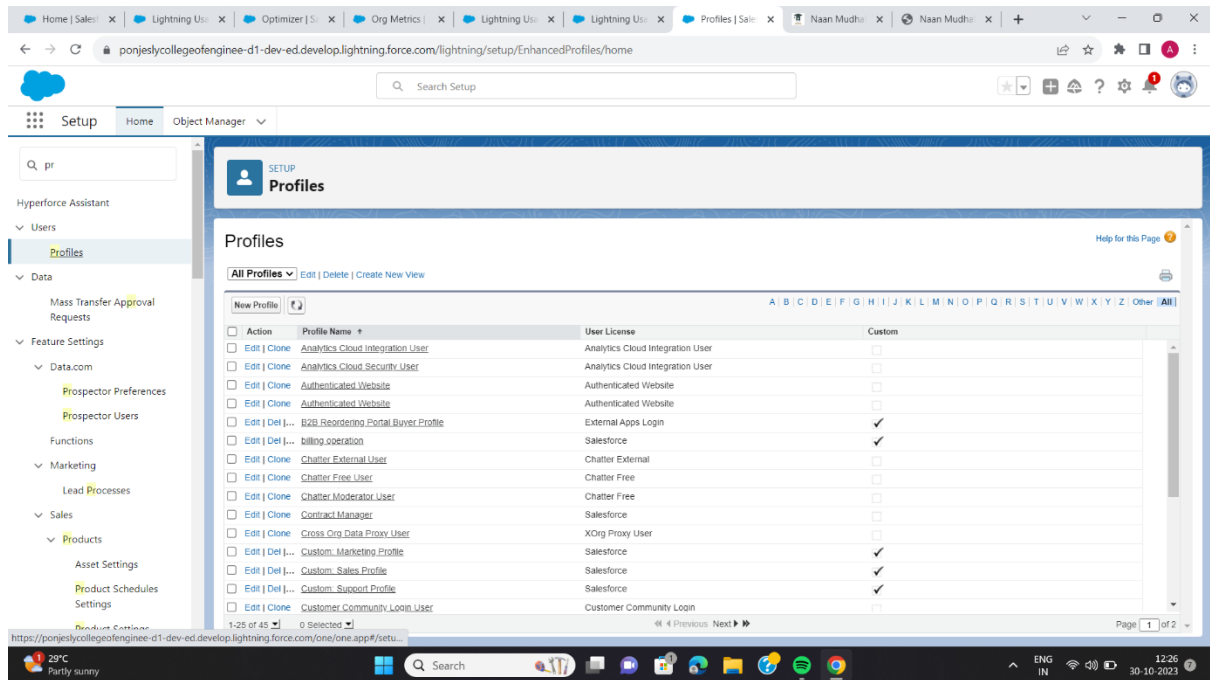
## STEP 5 : Page Layout

The screenshot shows the Salesforce Setup interface for the 'consultants' object. The left sidebar lists various setup options, with 'Page Layouts' selected. The main content 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', 'mobile number', 'Owner', 'address', 'customer name', '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

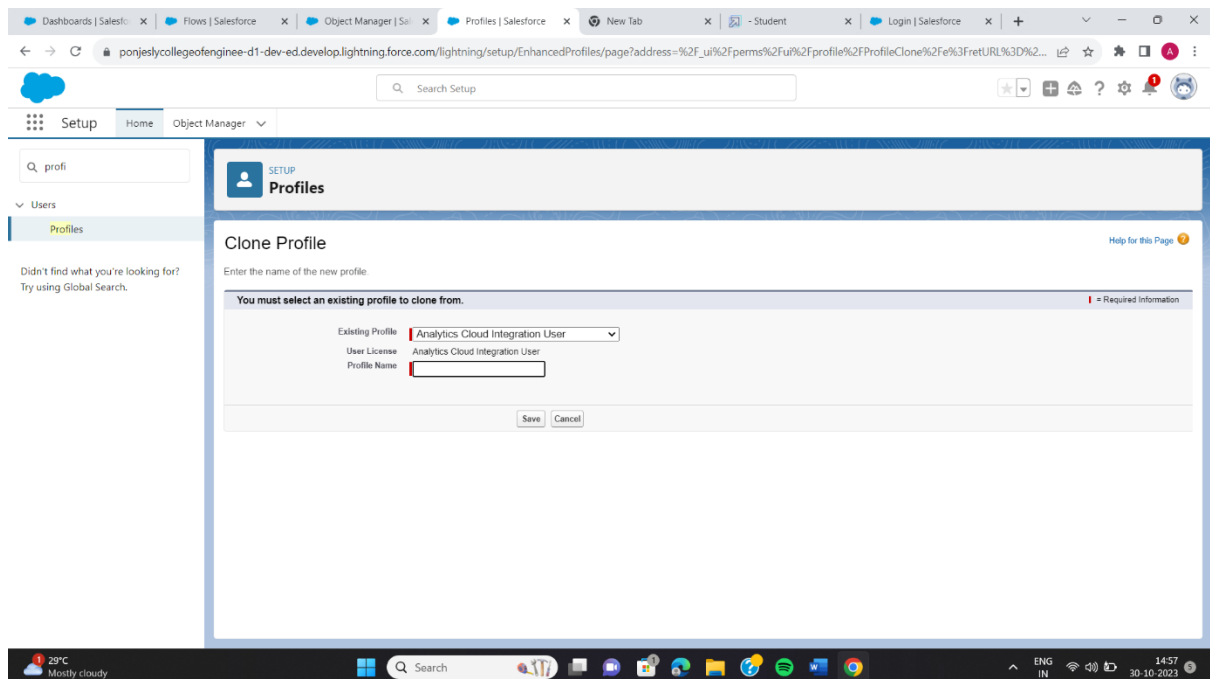
The screenshot shows the Salesforce Setup interface for the 'Roles' section. The left sidebar lists various setup options, with 'Roles' selected. The main content area displays the 'Understanding Roles' page. At the top, there is a 'Sample Role Hierarchy' dropdown menu set to 'Territory-based Sample'. 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 associated sales representatives: 'Western Sales Rep' (CA Sales Rep, OR Sales Rep), 'Eastern Sales Rep' (NY Sales Rep, MA Sales Rep), and 'International Sales Rep' (Asian Sales Rep, European Sales Rep). To the right of the diagram, there are three text 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 a navigation menu with 'Profiles' highlighted. The main content area displays a table of existing profiles. The table has columns for 'Action', 'Profile Name', 'User License', and 'Custom'. The 'Custom' column has checkboxes for various features. The table lists several profiles, including 'Analytics Cloud Integration User', 'Analytics Cloud Security User', 'Authenticated Website', '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' checkboxes are checked for 'External Apps Login', 'Salesforce', 'Salesforce', 'Salesforce', and 'Customer Community Login'.

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit   Clone	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/> Edit   Del   ...	B2B Reordering Portal Buyer Profile	External Apps Login	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Del   ...	billing operation	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Chatter External User	Chatter External	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Chatter Free User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Contract Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Cross Org Data Proxy User	XOrg Proxy User	<input type="checkbox"/>
<input type="checkbox"/> Edit   Del   ...	Custom Marketing Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Del   ...	Custom Sales Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Del   ...	Custom Support Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Customer Community Login User	Customer Community Login	<input type="checkbox"/>



The screenshot shows the Salesforce Setup interface with the 'Clone Profile' page selected. The left sidebar contains a navigation menu with 'Profiles' highlighted. The main content area displays a form titled 'Clone Profile'. The form has a section 'You must select an existing profile to clone from.' with a dropdown menu for 'Existing Profile' and a text input for 'Profile Name'. The 'Existing Profile' dropdown is set to 'Analytics Cloud Integration User'. The 'Profile Name' input field is empty. There are 'Save' and 'Cancel' buttons at the bottom of the form.

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile: Analytics Cloud Integration User

User License: Analytics Cloud Integration User

Profile Name:

Save Cancel

## 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 assigned profiles: Chatter Free User, System Administrator, store supervisor, Analytics Cloud Integration User, and Analytics Cloud Security User. At the bottom of the page, there are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'.

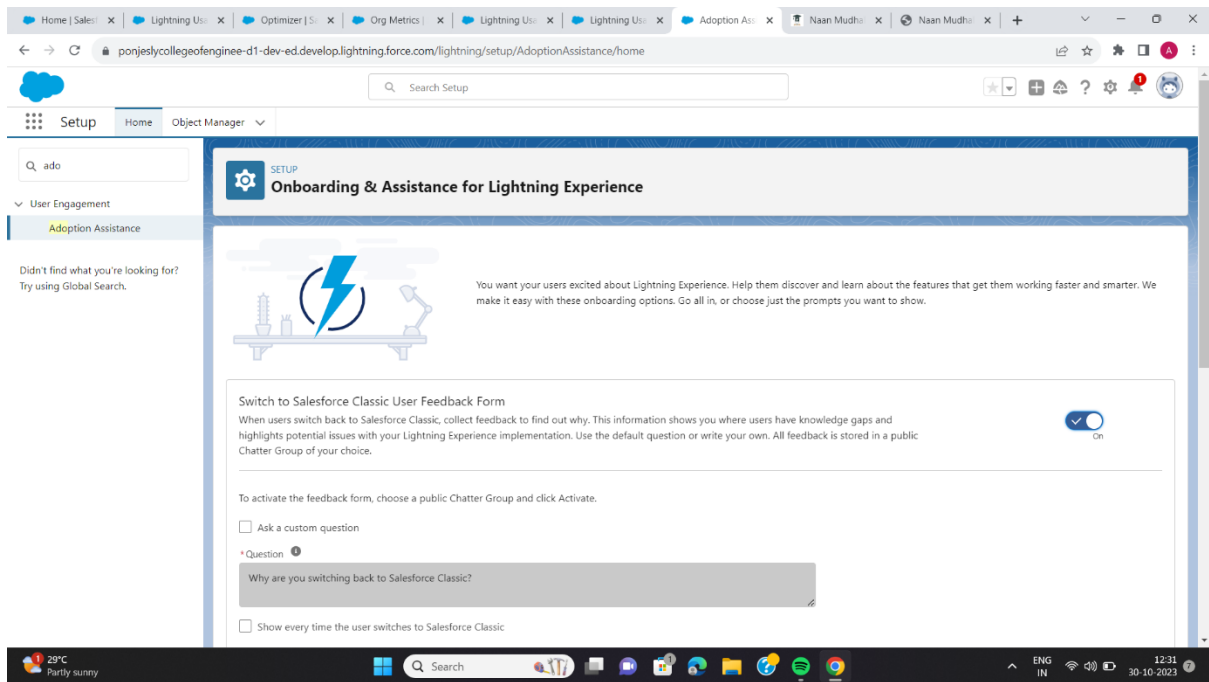
Action	Full Name	Alias	Username	Role	Active	Profile
<a href="#">Edit</a>	Chatter Expert	Chatter	chatty-00d5y0000007roleav-vj8h4tuzv@chatter.salesforce.com		✓	Chatter Free User
<a href="#">Edit</a>	S. Anish	AS	anish13422@nm.com		✓	System Administrator
<a href="#">Edit</a>	S. Anish	AS	anish13422@nm.com	store head	✓	store supervisor
<a href="#">Edit</a>	User Integration	integ	integration@00d5y0000007roleav.com		✓	Analytics Cloud Integration User
<a href="#">Edit</a>	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. Each user is active and has a specific profile assigned. The interface includes navigation links, a search bar, and buttons for adding or managing users.

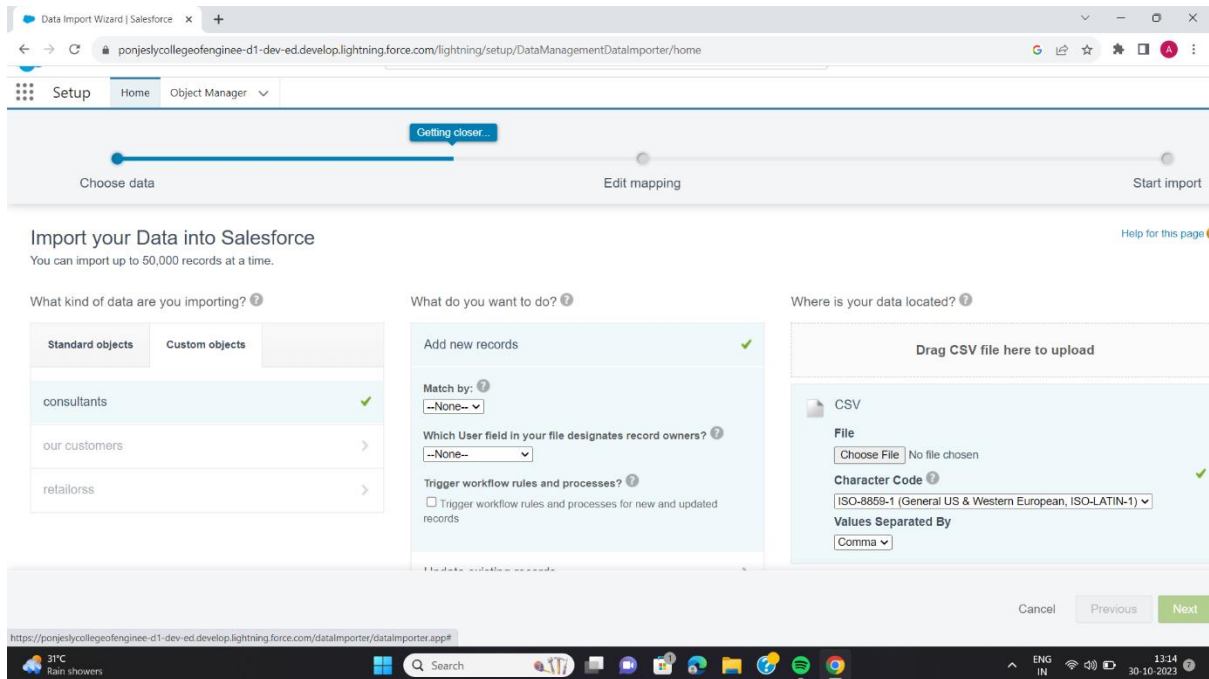
Action	Full Name	Alias	Username	Role	Active	Profile
<a href="#">Edit</a>	Chatter Expert	Chatter	chatty-00d5y0000007roleav-vj8h4tuzv@chatter.salesforce.com		✓	Chatter Free User
<a href="#">Edit</a>	S. Anish	AS	anish13422@nm.com		✓	System Administrator
<a href="#">Edit</a>	S. Anish	AS	anish13422@nm.com	store head	✓	store supervisor
<a href="#">Edit</a>	User Integration	integ	integration@00d5y0000007roleav.com		✓	Analytics Cloud Integration User
<a href="#">Edit</a>	User Security	sec	insightsecurity@00d5y0000007roleav.com		✓	Analytics Cloud Security User

## STEP 9 : Create User Adoption

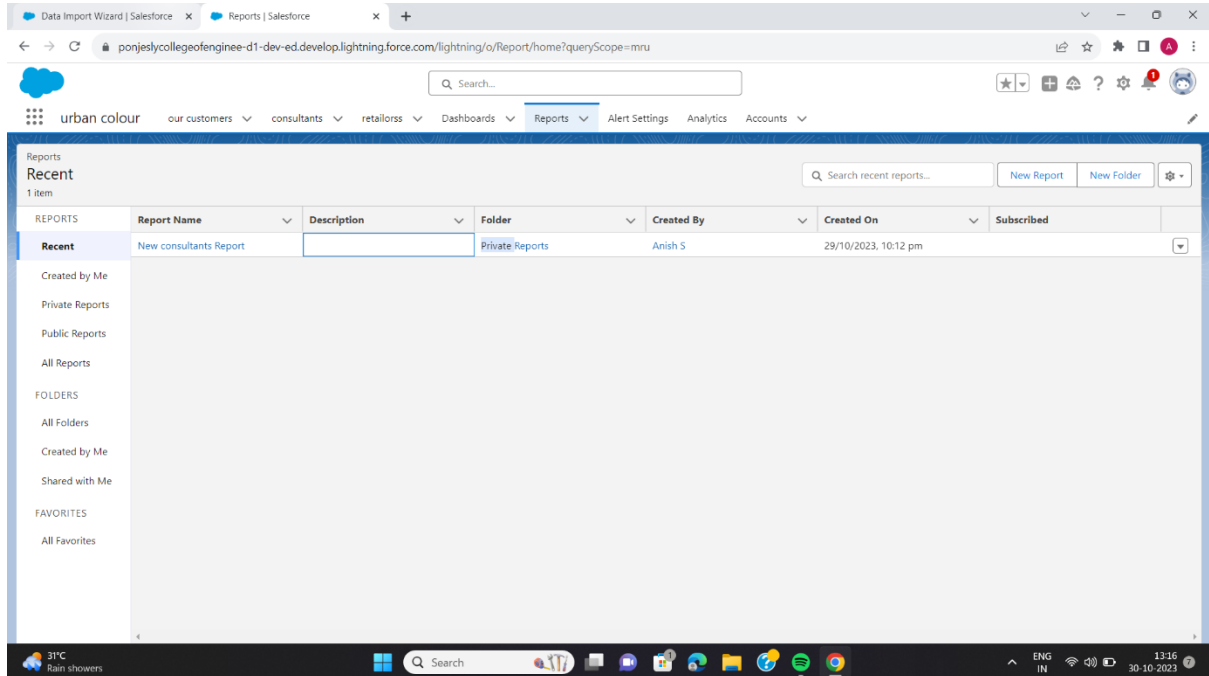




## STEP 10 : Data Import Wizard



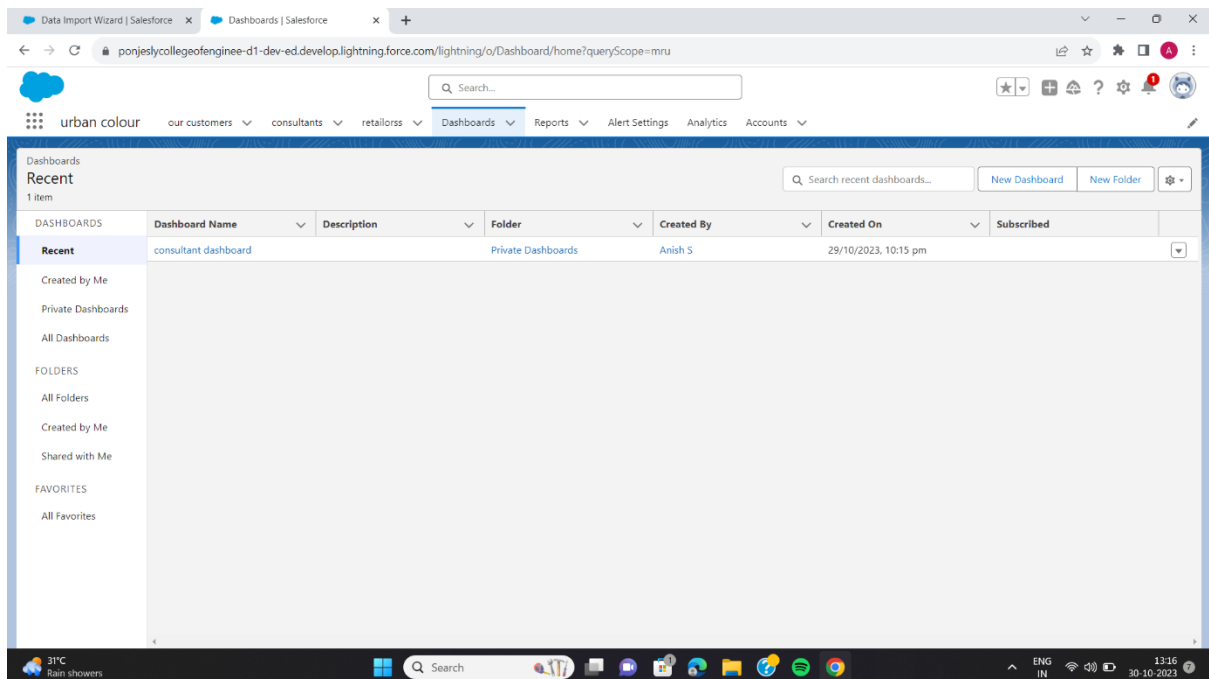
## STEP 11 : Report In Salesforce



The screenshot shows the Salesforce Reports interface. The top navigation bar includes the Salesforce logo, a search bar, and a menu with options like 'urban colour', 'our customers', 'consultants', 'retailors', 'Dashboards', 'Reports', 'Alert Settings', 'Analytics', and 'Accounts'. The 'Reports' tab is selected. Below the navigation bar, the 'Reports' section is displayed with a 'Recent' filter. A table lists the recent reports, with one item visible: 'New consultants Report' created by 'Anish S' on '29/10/2023, 10:12 pm'. The table has columns for 'Report Name', 'Description', 'Folder', 'Created By', 'Created On', and 'Subscribed'. The left sidebar shows a navigation menu with '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'.

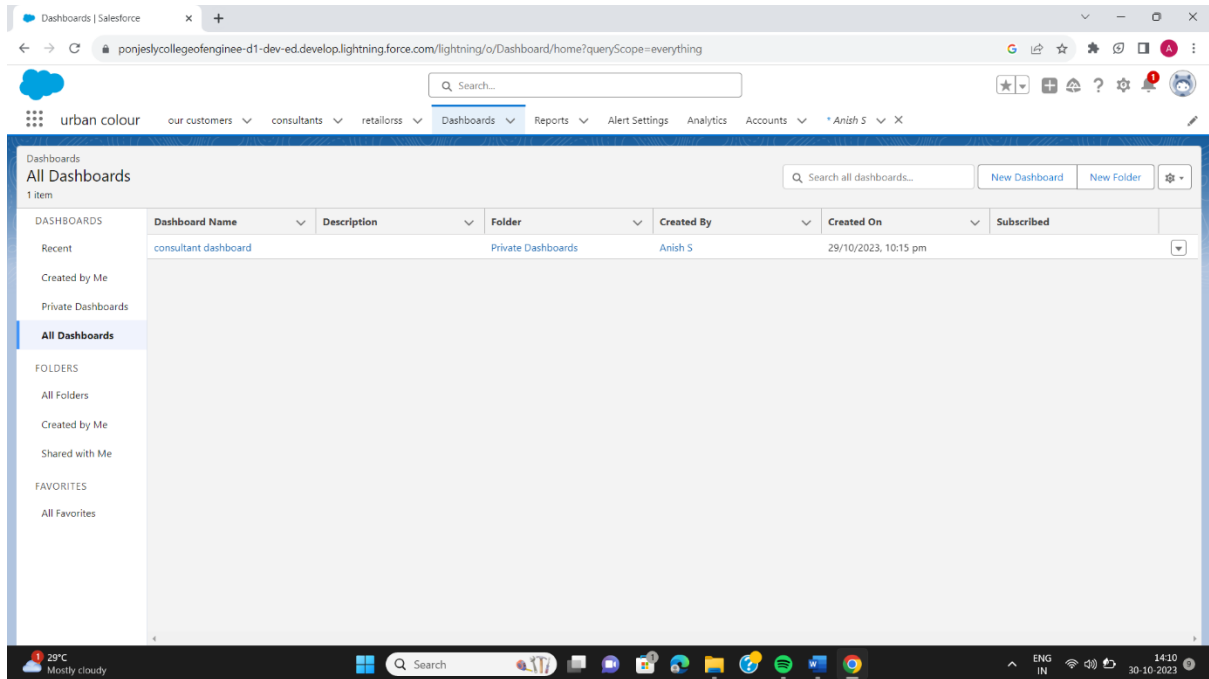
REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New consultants Report		Private Reports	Anish S	29/10/2023, 10:12 pm	

## STEP 12 : Create Dashboard

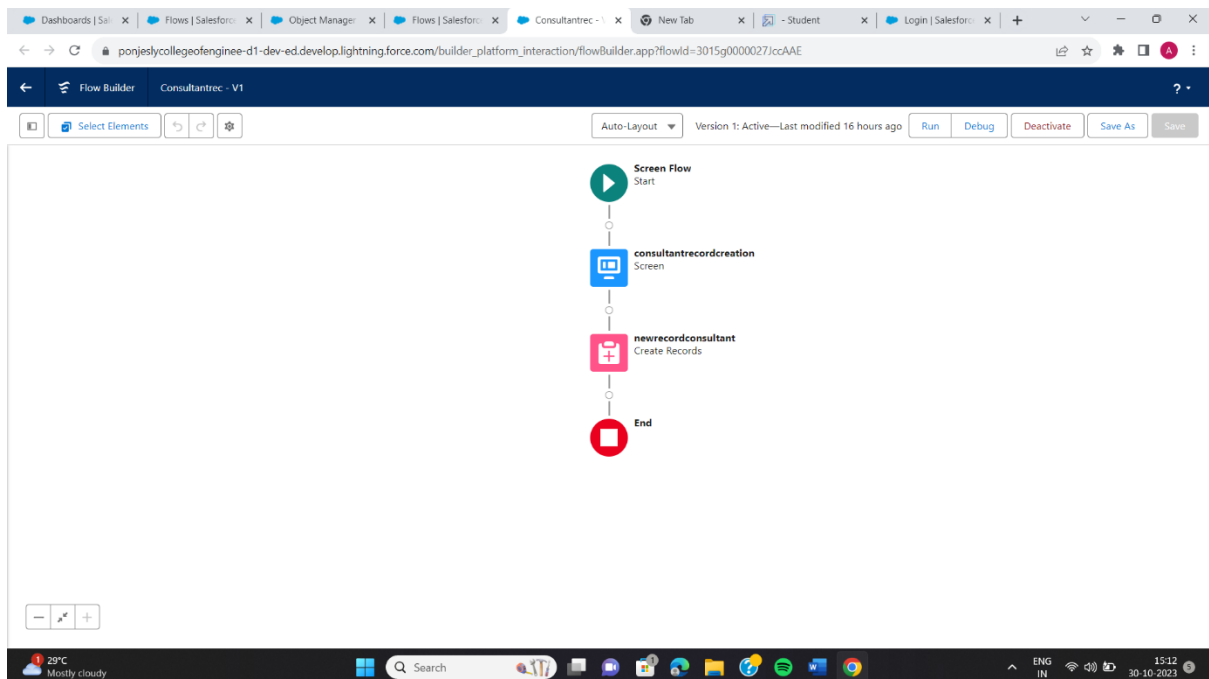


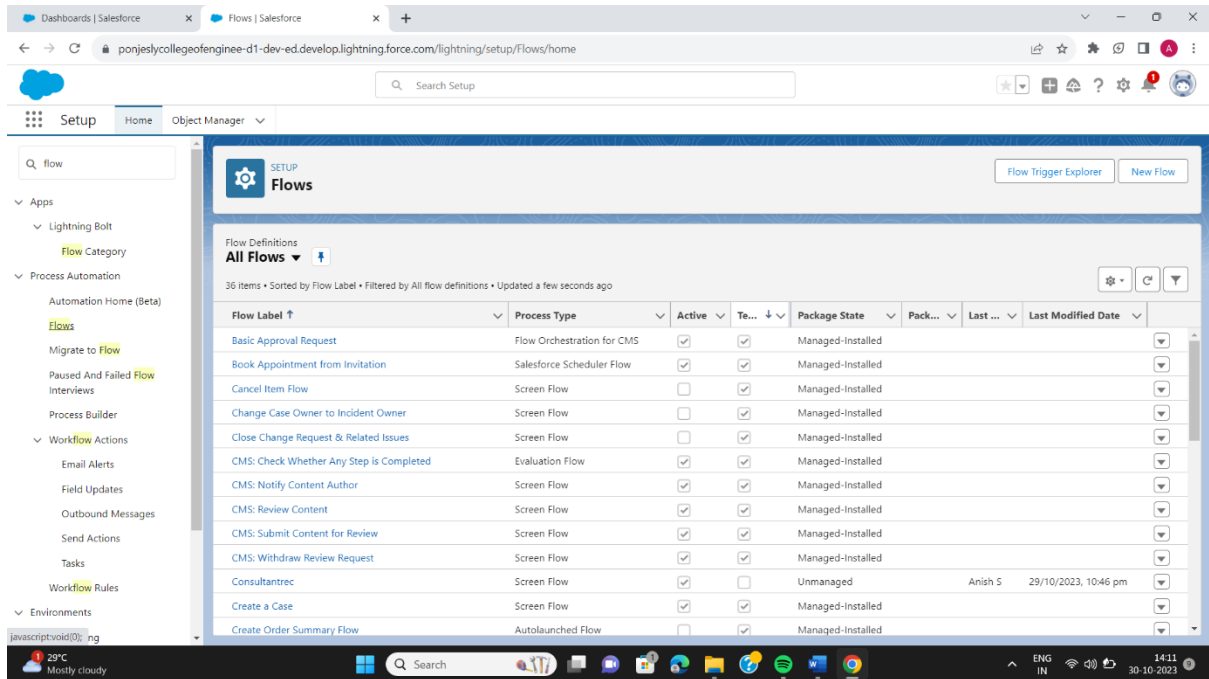
The screenshot shows the Salesforce Dashboards interface. The top navigation bar is similar to the previous screenshot, but the 'Dashboards' tab is selected. Below the navigation bar, the 'Dashboards' section is displayed with a 'Recent' filter. A table lists the recent dashboards, with one item visible: 'consultant dashboard' created by 'Anish S' on '29/10/2023, 10:15 pm'. The table has columns for 'Dashboard Name', 'Description', 'Folder', 'Created By', 'Created On', and 'Subscribed'. The left sidebar shows a navigation menu with '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	

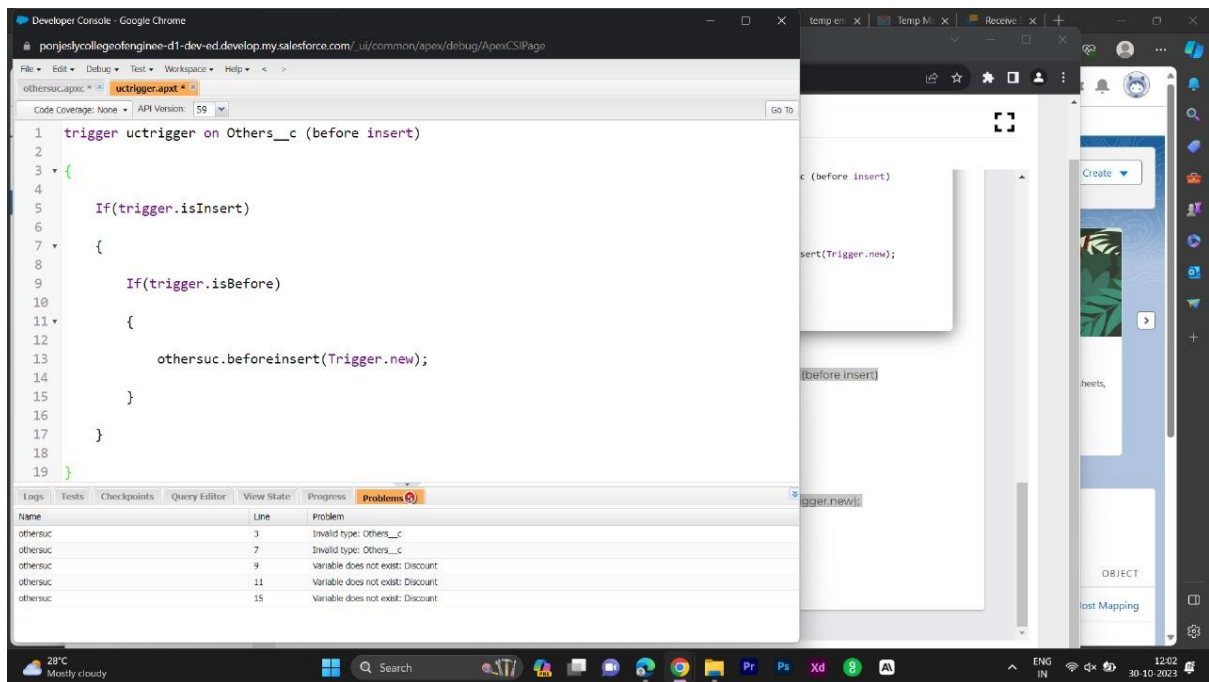


## STEP 13 : Create a Flow





## Step:14 : Create Triggers



Developer Console - Google Chrome

porjestycollegeofengineer-d1-dev-ed.develop.my.salesforce.com/\_ui/common/apex/debug/ApexCSPage

othersuc.apex | uc.trigger.apex

Code Coverage: None | API Version: 59

```
1 public class othersuc {
2
3     public static void beforeinsert(list<Others__c> newlist){
4
5
6
7         for(Others__c Discount : newlist){
8
9             if(Discount.Employee__c == 'Staff'){
10
11                 Discount.Coupon__c = '20%OFF';
12
13             }else{
14
15                 Discount.Coupon__c='No Offers';
16
17             }
18
19         }
20     }
21 }
```

Logs | Tests | Checkpoints | Query Editor | View State | Progress | Problems (5)

Name	Line	Problem
othersuc	3	Invalid type: Others__c
othersuc	7	Invalid type: Others__c
othersuc	9	Variable does not exist: Discount
othersuc	11	Variable does not exist: Discount
othersuc	15	Variable does not exist: Discount

28°C Mostly cloudy

Search

ENG IN 12:02 30-10-2023

temp en x Temp M x Receive x

uc (before insert)

sert(Trigger.new);

(before insert)

gger.new;

Create

OBJECT

lost Mapping