Cosmetics Store Management

SALESFORECE NAAN MUDHALVAN

PROJECT REPORT

Submitted By

DIVYASHRI P (6112202205006)

NANDHINI VENKATESAN (6112202205020)

SOWMIYA A S (6112202205036)

GOPIKA P (6112202205303)

in partial fulfilment for the award of the

degree of

BACHELOR OF TECHNOLOGY

in

INFORMATION TECHNOLOGY

KNOWLEDGE INSTITUTE OF TECHNOLOGY,

SALEM-637504

ANNA UNIVERSITY::CHENNAI 600025

BONAFIDE CERTIFICATE

Certified that this project report titled **"COSMETIC STORE MANAGEMENT"** is the bonafide work of **"DIVYASHRI P (6112202205006), NANDHINI VENKATESAN (6112202205020), SOWMIYA A S (6112202205041), GOPIKA P (6112202205022)** "who carried out the projectwork under my supervision.

SIGNATURE	**SIGNATURE**
Mr. R. AYYAPPAN. ME.,	**Mr. T. KARTHIKEYAN B.TECH,M.S(IT),Ph.D,**
ASSISTANT PROFESSOR	**ASSISTANT PROFESSOR**
FACULTY MENTOR	**SPOC FACULTY**
Department of Information Technology,	Department of Computer Science and Engineering,
Knowledge Institute of Technology,	Knowledge Institute of Technology,
Kakapalayam,	Kakapalayam,
Salem- 637 504.	Salem- 637 504.

-- --

SPOC **HEAD OF THE DEPARTMENT**

ACKNOWLEDGEMENT

At the outset, we express our heartfelt gratitude to god**,** who has been our strength to bring this project to light.

At this pleasing moment of having successfully completed our project, we wish to convey our sincere thanks and gratitude to our beloved president **Mr.C.BALAKRISHNAN,** who has provided all the facilities to us. We would like to convey our sincere thanks to our beloved Principal, **Dr.PSS.SRINIVASAN,** for forwarding us to do our project and offering adequate duration in completing our project.

We express our sincere thanks to our Head of the Department, **Dr.P.SACHIDHANANDAM,** Department of Computer Science and Business
Systemsfor fostering the excellent academic climate in the Department.

We express our pronounced sense of thanks with deepest respect and gratitude to our Faculty Mentor **Mr.R.AYYAPPAN,** Department of Computer Science and Business Systems for their valuableand precious guidance and for having amicable relation.

With deep sense of gratitude, we extend our earnest and sincere thanks to our SPOC **Mr.T.KARTHIKEYAN,** Assistant Professor, Department of Computer Science and Engineering for his guidance and encouragement during this project.

We would also like express our thanks to all the faculty members of our Department, friends and students who helped us directly and indirectly in all aspects of the project work to get completed successfully.

TABLE OF CONTENTS

LIST OF FIGURES

LIST OF ABBREVIATION

CRM	Customer Relationship Management
ESP	Email Service Provider
UI	User Interface
UX	User Experience
OWD	Org - Wide Default
CTA	Call To Action
CSV	Comma - Separated Values
SLA	Service Level Agreement
API	Application Programming Interface
SaaS	Software as a Service
PaaS	Platform as a Service

CHAPTER - 1
INTRODUCTION

Salesforce, a leading cloud-based Customer Relationship Management (CRM) platform, is a pivotal tool for organizations to manage customer data, optimize sales processes, and elevate customer interactions. Its multifaceted features include Sales Cloud, which enhances sales management through lead tracking, opportunity management, and seamless email integration. Service Cloud focuses on exceptional customer support, featuring case management, knowledge base development, and multi-channel support. Marketing Cloud empowers businesses with marketing automation, email campaigns, social media engagement, and in-depth analytics. Salesforce's hallmark is its customizability, allowing businesses to tailor the platform to meet specific requirements, while robust integration capabilities facilitate seamless connections with other business applications.

The platform equips businesses with powerful reporting and analytics tools, enabling data-driven decisions and insightful, customized reports and dashboards. Salesforce ensures mobile accessibility, enabling users to stay connected and productive while on the move. A paramount emphasis on data security and compliance guarantees data protection and privacy. Whether you're a small start-up or a large enterprise, Salesforce offers scalability to accommodate your evolving needs.

Through Salesforce, organizations foster improved customer relationships, increased sales efficiency, and superior customer support. It empowers businesses to make data-driven decisions, streamline operations, and create impactful, targeted marketing campaigns. This introduction encapsulates Salesforce's capabilities and benefits, offering a concise overview for your project document, allowing for a better understanding of how the platform can contribute to your specific

CHAPTER - 2
PROJECT SPECIFICATIONS

2.1 Project Goal

The primary goal of the Employee Travel Approval Application in Salesforce for corporates is to optimize and streamline the management of employee travel requests and approvals. The project aims to provide a user-friendly and efficient solution that automates approval workflows, ensures real-time visibility and notifications, and simplifies expense tracking and reimbursement. User training and support are essential for ensuring adoption, and the application should be scalable and highly customizable to meet evolving organizational needs. Overall, the project's focus is on enhancing productivity, cost control, and compliance with corporate policies in the realm of travel management.

2.2 Creation Salesforce Org

- **Creation of Developer Account**

To Sign Up for a Salesforce Account

To Log In to Your Salesforce Account

To Access the Setup Menu

To Customize Fields

To Set Up Relationships

To Deployment

CHAPTER-3
OBJECT CREATION

A popular object for cosmetic storage management is a makeup organizer or vanity organizer. These organizers come in various shapes and sizes, with compartments and drawers to store makeup, skincare products, brushes, and other cosmetic items neatly and efficiently. They help keep your cosmetics organized and easily accessible.

3.1 Create the Consultant Object

1. Click "Create Custom Object."
2. Fill out the object details, such as Object Name (e.g., "Consultants"), Record Name (e.g., "Consultant Name"), and Data Type for Record Name.
3. Set other properties, such as whether you want to track field history, allow reports, and allow activities.
4. Save the object.

3.2 Create the Retailers Object

To create the Retailers object continue the same steps which are followed for the above object.

3.3 Create the Other Object

Follow the same process as above to create custom objects for "Retailers" and "Others."

1)Define relevant fields for each object, such as "Retailer Name," "Retailer Location," "Other Contact Information," and so on.

1)Create the Consultant Object:

Step 1: Log in to Salesforce with administrative privileges.

Step 2: Click the "Gear" icon and select "Setup" to access the Salesforce Setup menu.

Step 3: In Setup, find "Objects" and select "Object Manager."

Step 4: Click the "Create" button to create a new custom object.

Step 5: Object Settings

Label: Enter "Store."

Plural Label: Enter "Store."

Step 6: Choose to auto-number records or manually specify the record name as "Employee Name."

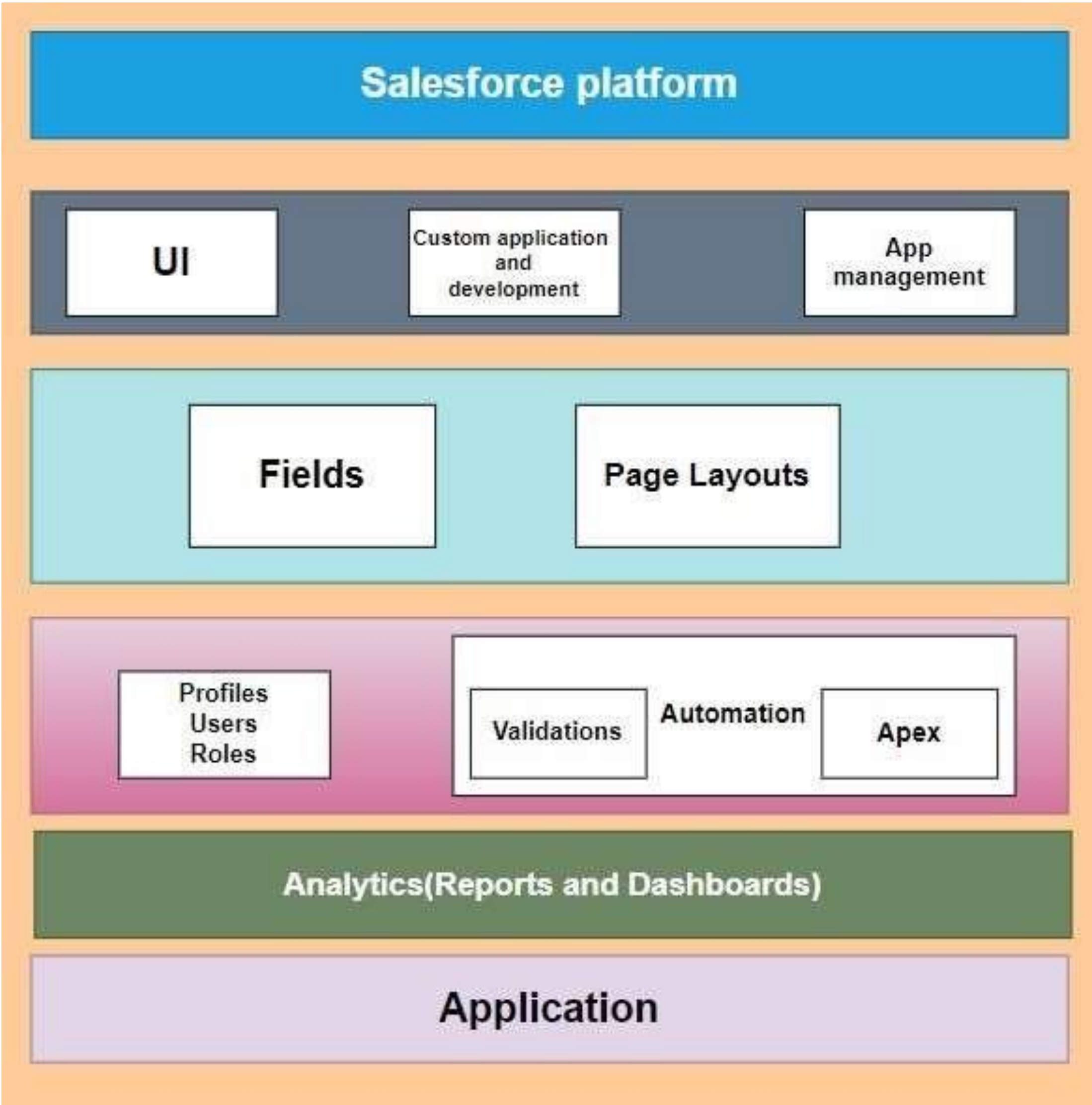
Step 7: Select "Text" as the data type for the record name. Step

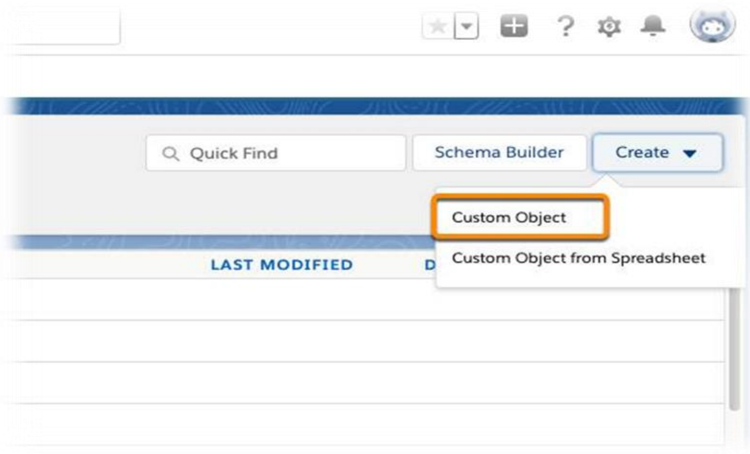
8: Check the Allow Reports checkbox.

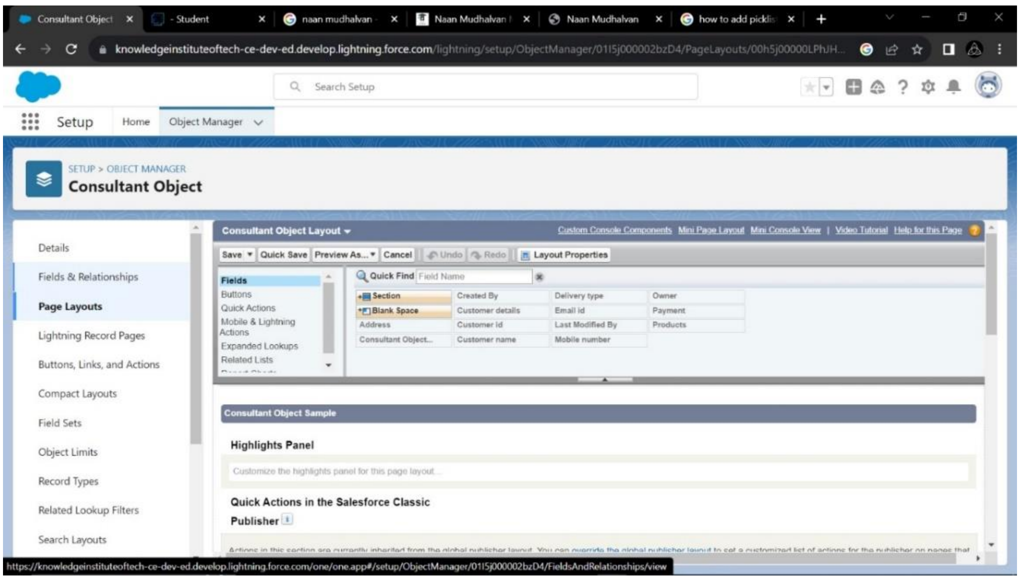
Step 9: Check the Allow Search checkbox.

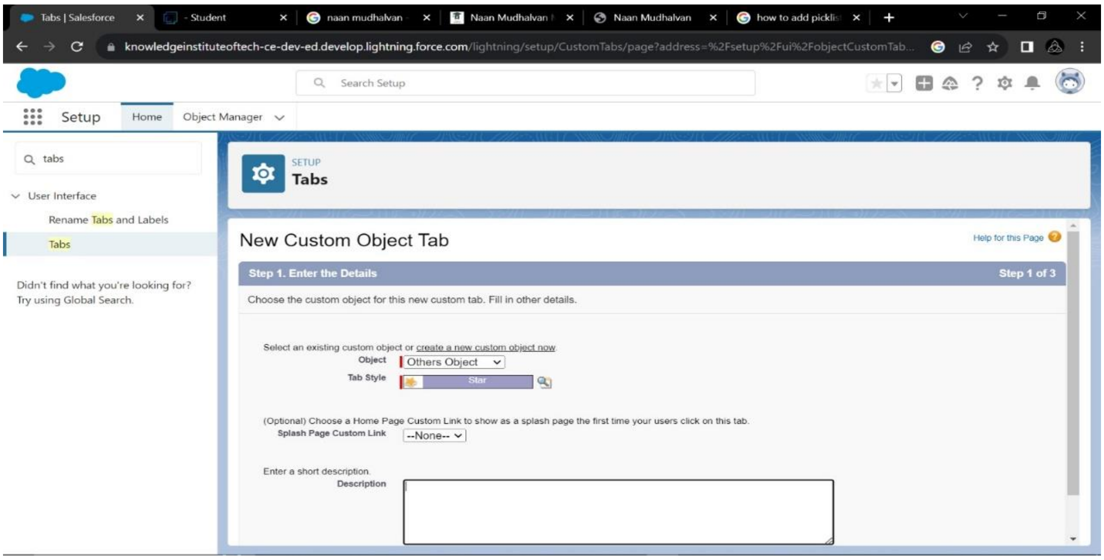
Step 10: Click "Save" to create the "Store" object.

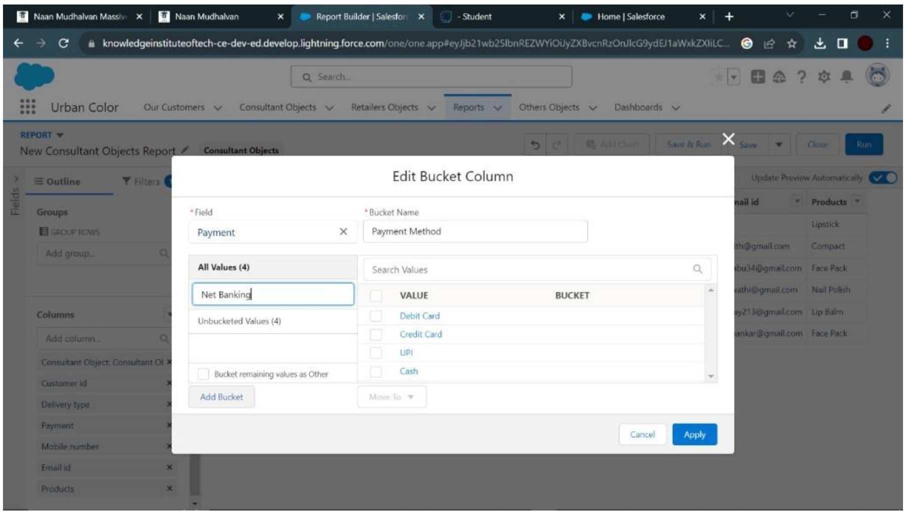
3.1.1) Technical Requirements

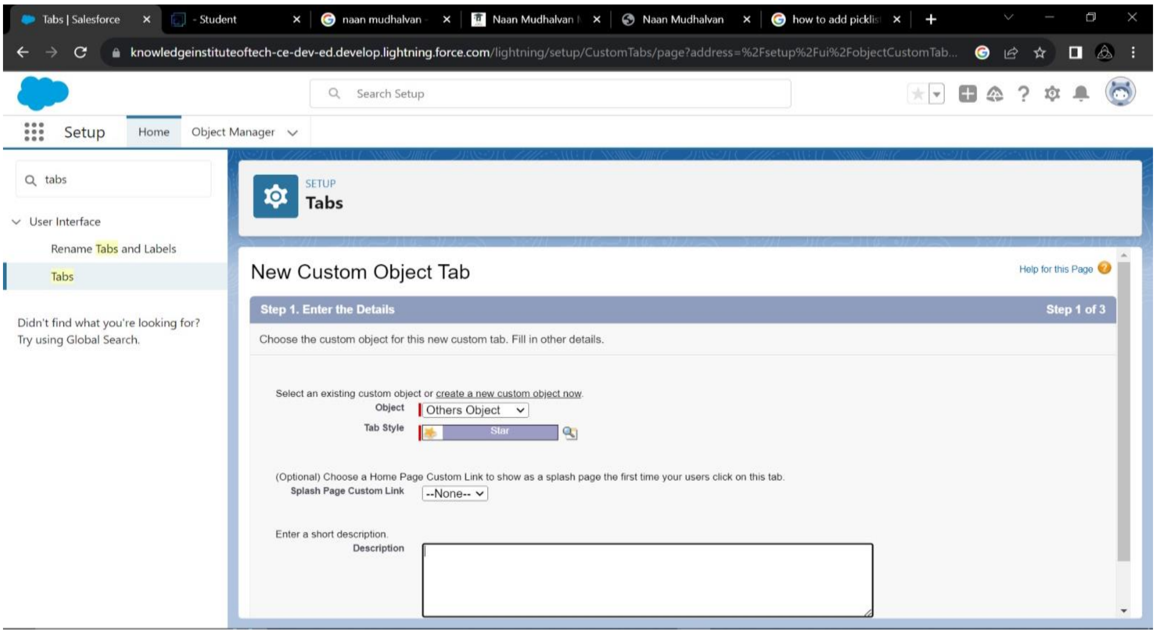


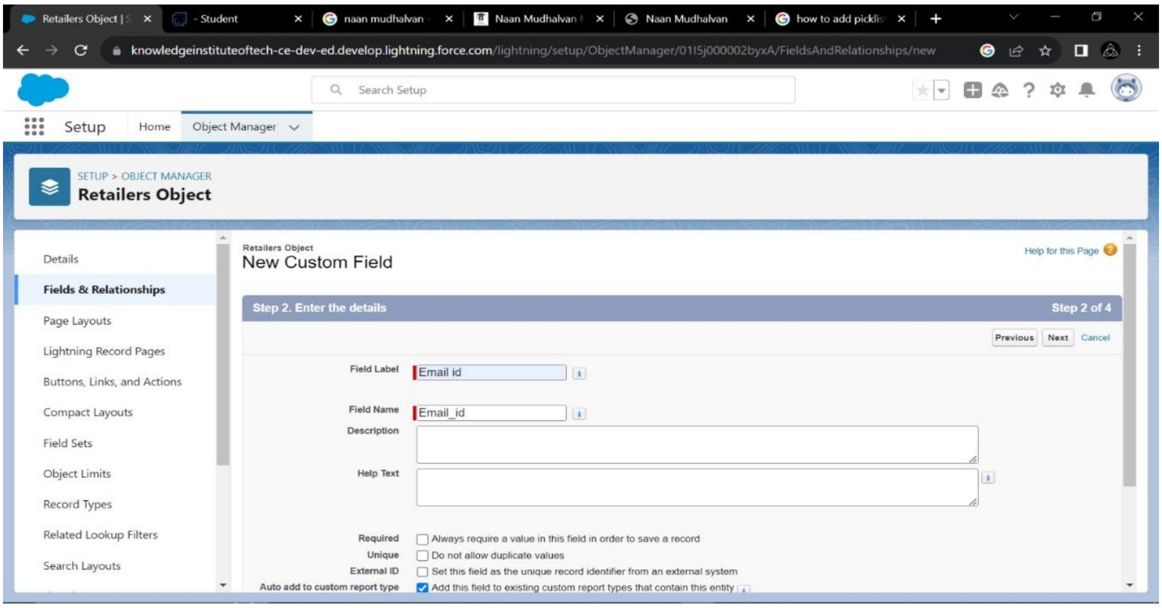

Quick Find
Schema Builder
Create
Custom Object
Custom Object from Spreadsheet
LAST MODIFIED


Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Consultant Object
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
Consultant Object Layout
Consultant Object Sample
Highlights Panel
Quick Actions in the Salesforce Classic
Publisher


SETUP
Tabs
New Custom Object Tab
Step 1. Enter the Details
Step 1 of 3
Choose the custom object for this new custom tab. Fill in other details.
Select an existing custom object or create a new custom object now.
Object
Others Object
Tab Style
(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.
Splash Page Custom Link
--None--
Enter a short description.
Description


Edit Bucket Column
Field
Payment
Bucket Name
Payment Method
All Values (4)
Net Banking
Unbucketed Values (4)
VALUE
BUCKET
Debit Card
Credit Card
UPI
Cash
Add Bucket
Cancel
Apply





Tabs:

Tabs in Salesforce help users view the information at a glance. It displays the data of objects and other web content in the application.

There are mainly 4 types of tabs:

1. **Standard Object Tabs:** Standard object tabs display data related tostandard objects.

2. **Custom Object Tabs:** Custom object tabs display data related tocustom objects. These tabs look and function just like standard tabs.

3. **Web Tabs:** Web Tabs display any external Web-based application orWeb page in a Salesforce tab.

4. **Visualforce Tabs:** Visualforce Tabs display data from a VisualforcePage.

1)Creation of Store Tab

Step 1: Log in to Salesforce with administrative privileges.

Step 2: Access Setup from the "Gear" icon.

Step 3: In Setup, find "User Interface" and select "Tabs."

Step 4: Click "New Custom Object Tab."

Step 5: Choose the "School" object and label it as "Schoos."

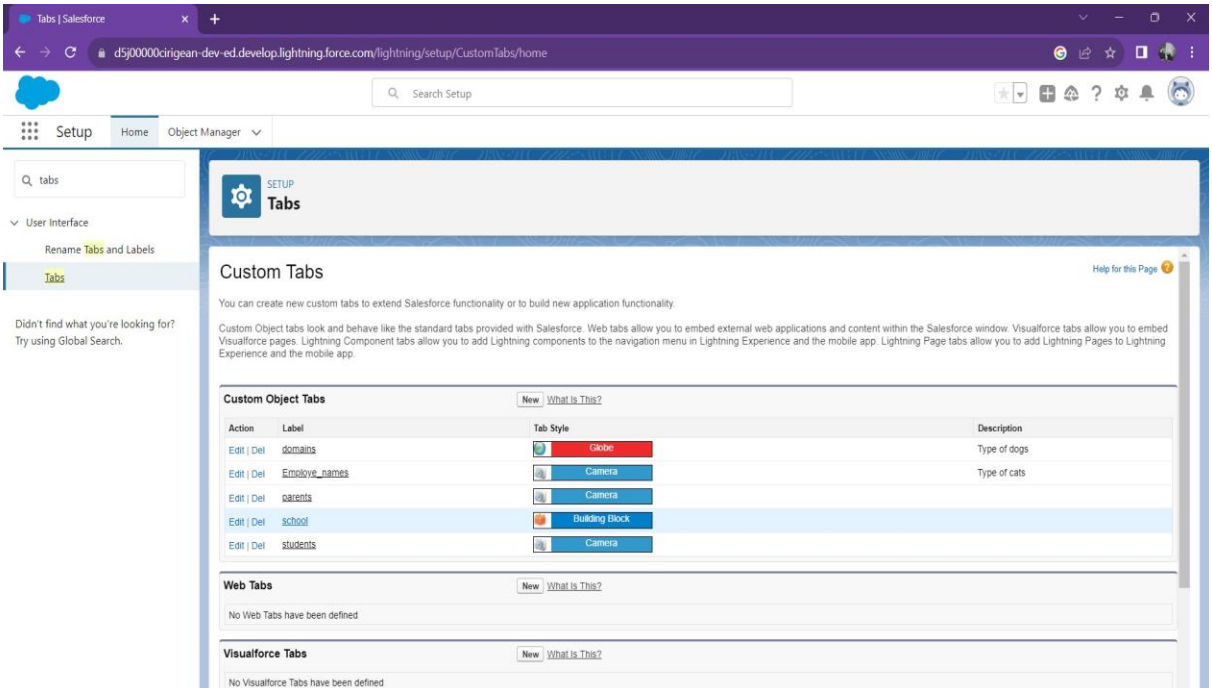
Step 6: Configure tab appearance, accessibility, and styling.

Step 7: Save the tab.

Step 8: Arrange the tab's order in "App Manager."

Step 9: Assign the tab to relevant user profiles in the "Profiles" section of Setup.

Step 10: Test the tab and deploy it for user access.



2) Creation of Costume Tab

Step 1: Log in to Salesforce with administrative privileges.

Step 2: Access Setup from the "Gear" icon.

Step 3: In Setup, go to "Objects and Fields" and select "Object Manager."

Step 4: Create a custom object for " Student" if it doesn't already exist. Ensure it has the necessary fields to capture Student information.

Step 5: Go to "User Interface" in Setup and select "Tabs."Step

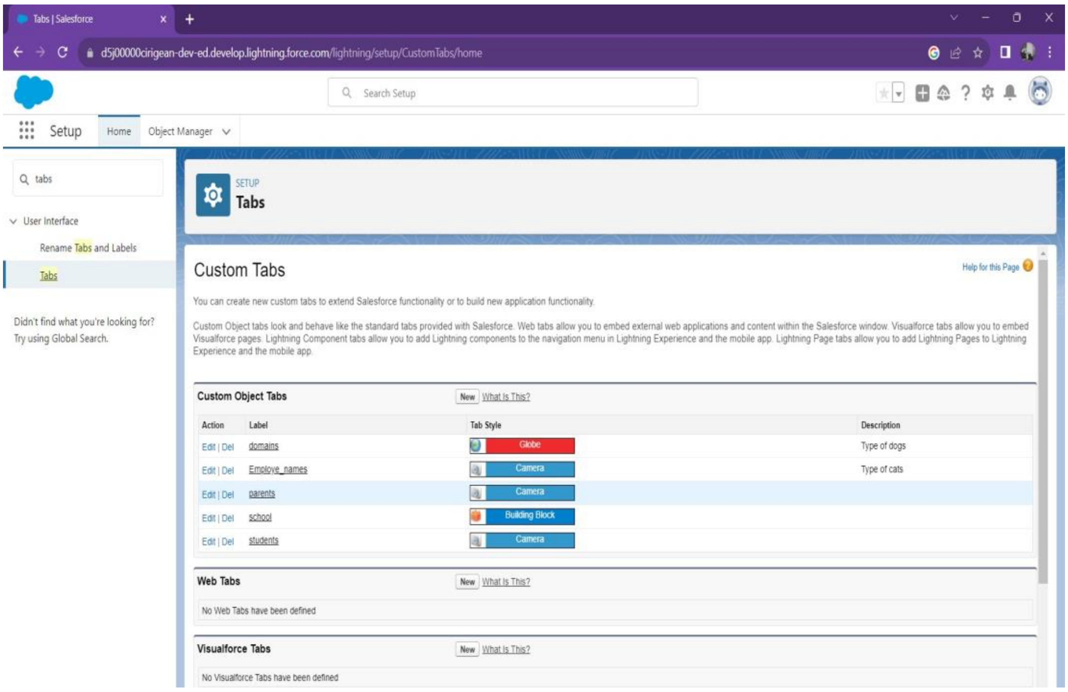
6: Click "New Custom Object Tab."

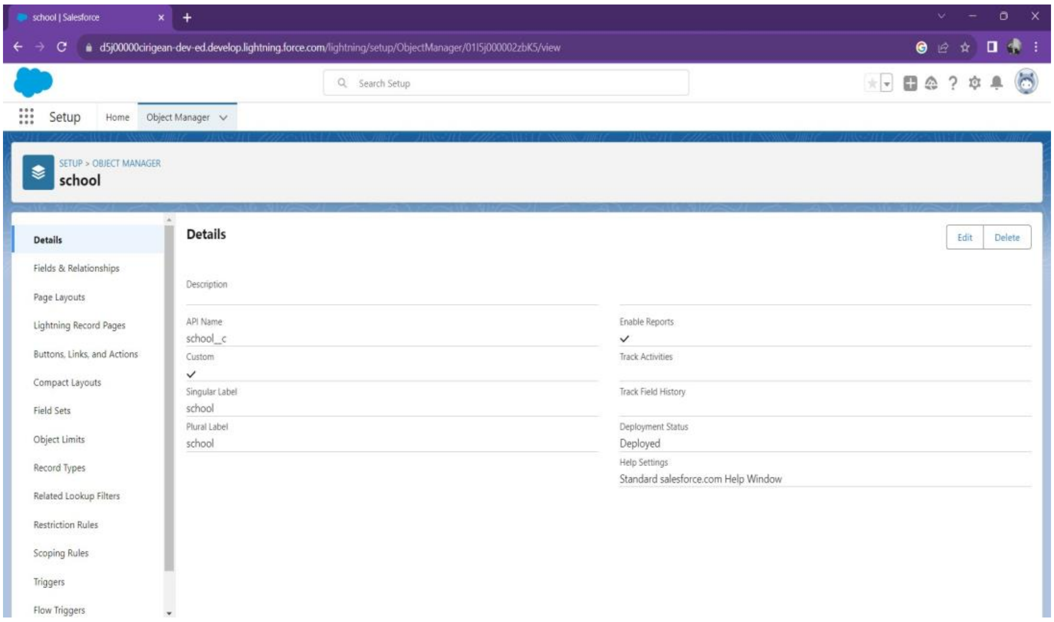
Step 7: Choose the custom object for " costume."

Step 8: Label the tab as " costume" and configure its style and color.

Step 9: Save the tab.

Step 10: Arrange the tab's order in your app and assign it to relevantuser profiles.


Tabs | Salesforce
d5j00000cirigean-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/home
Search Setup
Setup
Home
Object Manager
tabs
User Interface
Rename Tabs and Labels
Tabs
Didn't find what you're looking for? Try using Global Search.
SETUP
Tabs
Custom Tabs
Help for this Page
You can create new custom tabs to extend Salesforce functionality or to build new application functionality.
Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.
Custom Object Tabs
New
What Is This?
Action
Label
Tab Style
Description
Edit | Del
domains
Globe
Type of dogs
Edit | Del
Employe_names
Camera
Type of cats
Edit | Del
parents
Camera
Edit | Del
school
Building Block
Edit | Del
students
Camera
Web Tabs
No Web Tabs have been defined
Visualforce Tabs
No Visualforce Tabs have been defined


school | Salesforce
d5j00000cirigean-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5j000002zbK5/view
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
school
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Details
Edit
Delete
Description
API Name
school__c
Custom
Singular Label
school
Plural Label
school
Enable Reports
Track Activities
Track Field History
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window

CHAPTER-4
FIELDS AND RELATIONSHIP

Creating a comprehensive documentation for managing a store is crucial for the smooth hand efficient operation of your business. You can then expand upon sections to create detail documentation for your cosmetics store management.

1) Introduction:

Brief overview of the cosmetics store.
Purpose and importance of the documentation.

2) Store Policies:

Store hours and operating days.
Return and exchange policies.
Payment and pricing policies.
Loyalty programs and discounts.
Inventory Management

3) Point of sale (POS) system usage:

Sales techniques and customer interaction guidelines.
Handling customer inquiries and complaints.
Visual Merchandising

4) Store layout and design:

Product placement and presentation.
Seasonal and promotional displays.
Stock Replenishment

5) Inventory reordering and restocking processes.

Managing stock levels and reordering thresholds.
Vendor relationships and ordering supplies.
Employee Training

6) Onboarding and training procedures for new staff.
Employee roles and responsibilities.
Ongoing training and development.
Security and Loss Prevention

7) Security systems and procedures.
Theft prevention measures.
Employee and visitor safety guidelines.
Marketing and Promotions

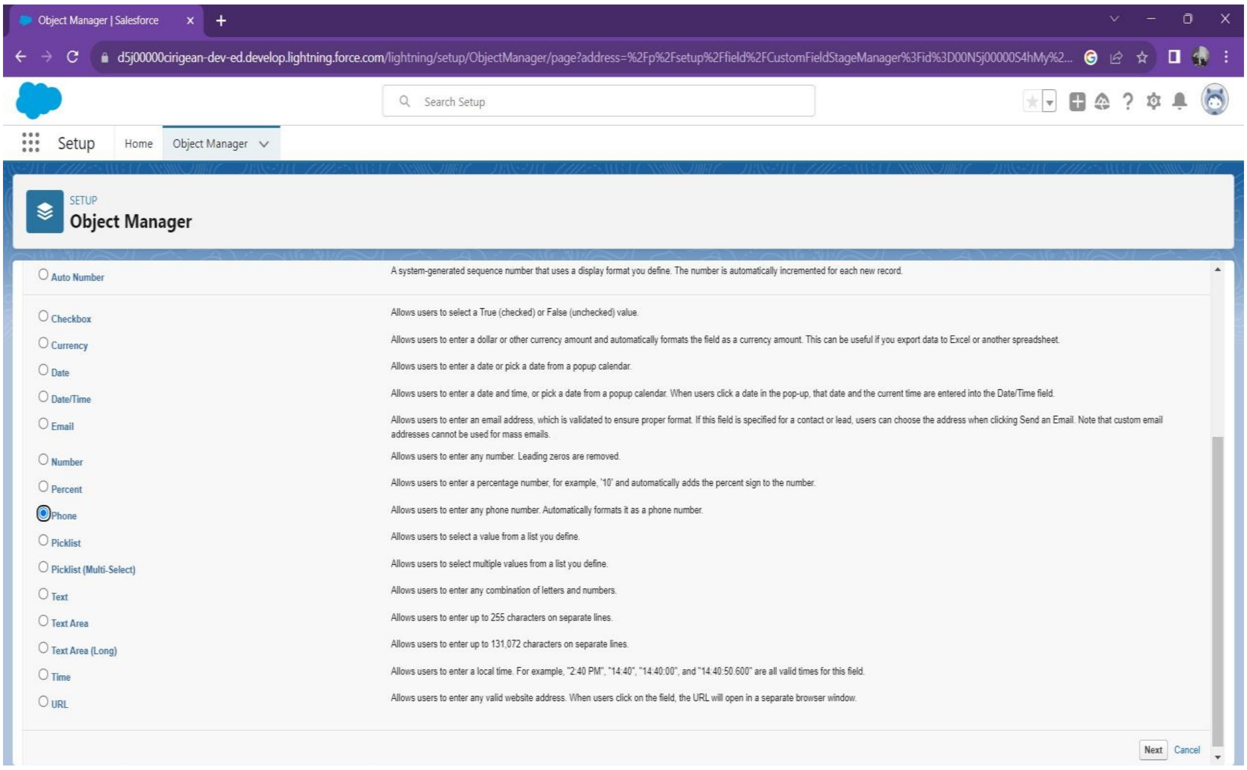
8) Marketing strategies and campaigns.
Social media management.
Collaborations and partnerships with brands.
Financial Management

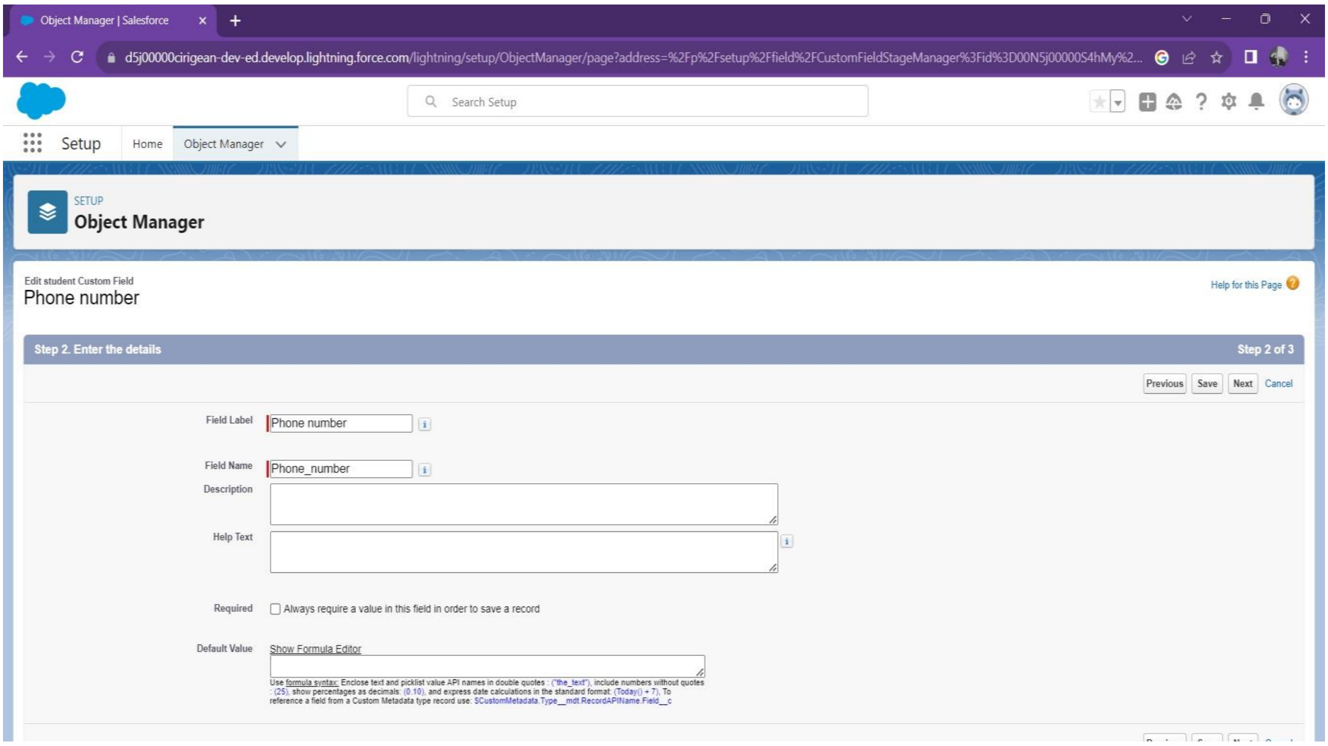
9) Daily, weekly, and monthly financial tracking.
Budgeting and expense management.
Financial reporting and analysis.
Health and Safety

10) Handling and disposal of cosmetics.
Hygiene and cleanliness protocols.
Compliance with health and safety regulations.
Record Keeping

11) Documentation of sales, expenses, and transactions.
Employee records and payroll management.
Customer database and contact information.
Store Maintenance

12) Route maintenance and repairs.
Cleaning and upkeep schedules.
Equipment and technology maintenance.
Emergency Procedures


Object Manager | Salesforce
d5j00000cirigean-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/page?address=%2Fp%2Fsetup%2Ffield%2FCustomFieldStageManager%3Fid%3D00N5j00000S4hMy%2...
Search Setup
Setup
Home
Object Manager
SETUP
Object Manager
Auto Number
A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
Checkbox
Allows users to select a True (checked) or False (unchecked) value.
Currency
Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
Date
Allows users to enter a date or pick a date from a popup calendar.
Date/Time
Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
Email
Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
Number
Allows users to enter any number. Leading zeros are removed.
Percent
Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
Phone
Allows users to enter any phone number. Automatically formats it as a phone number.
Picklist
Allows users to select a value from a list you define.
Picklist (Multi-Select)
Allows users to select multiple values from a list you define.
Text
Allows users to enter any combination of letters and numbers.
Text Area
Allows users to enter up to 255 characters on separate lines.
Text Area (Long)
Allows users to enter up to 131,072 characters on separate lines.
Time
Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50.600" are all valid times for this field.
URL
Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.
Next
Cancel


Object Manager | Salesforce
d5j00000cirigean-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/page?address=%2Fp%2Fsetup%2Ffield%2FCustomFieldStageManager%3Fid%3D00N5j00000S4hMy%2...
Search Setup
Setup
Home
Object Manager
SETUP
Object Manager
Edit student Custom Field
Phone number
Help for this Page
Step 2. Enter the details
Step 2 of 3
Previous
Save
Next
Cancel
Field Label
Phone number
Field Name
Phone_number
Description
Help Text
Required
Always require a value in this field in order to save a record
Default Value
Show Formula Editor

CHAPTER-5
LIGHTNING APP

Lightning App:

Apps in Salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo, and a particular set of tabs. The simplest app usually has just two tabs.

There are 2 types of Salesforce applications:

Standard apps: these apps come with every occurrence ofSalesforce as default. Community, Call Centre, Content, Sales, Marketing, Salesforce Chatter, Site.com, and App Launcher are included in these apps. The description, logo, and label of a standard app cannot be altered.

Custom apps: these apps are created according to the needs of a company. They can be made by putting custom and standard tabs together. Logos for custom apps can be changed.

1. From Setup, enter App Manager in the Quick Find and select App Manager.

2. Click New Lightning App.

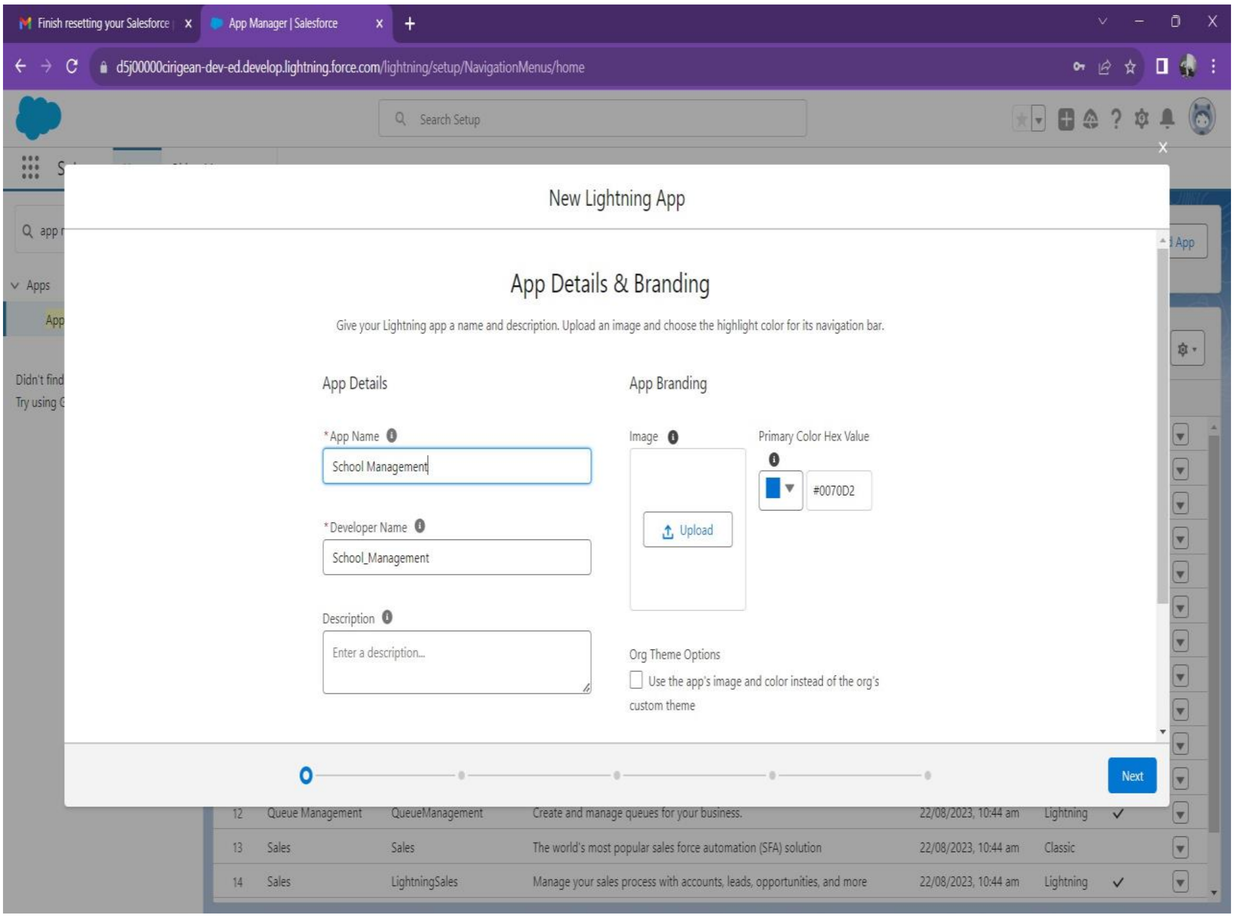
3. Enter School Management as the App Name, then click Next.

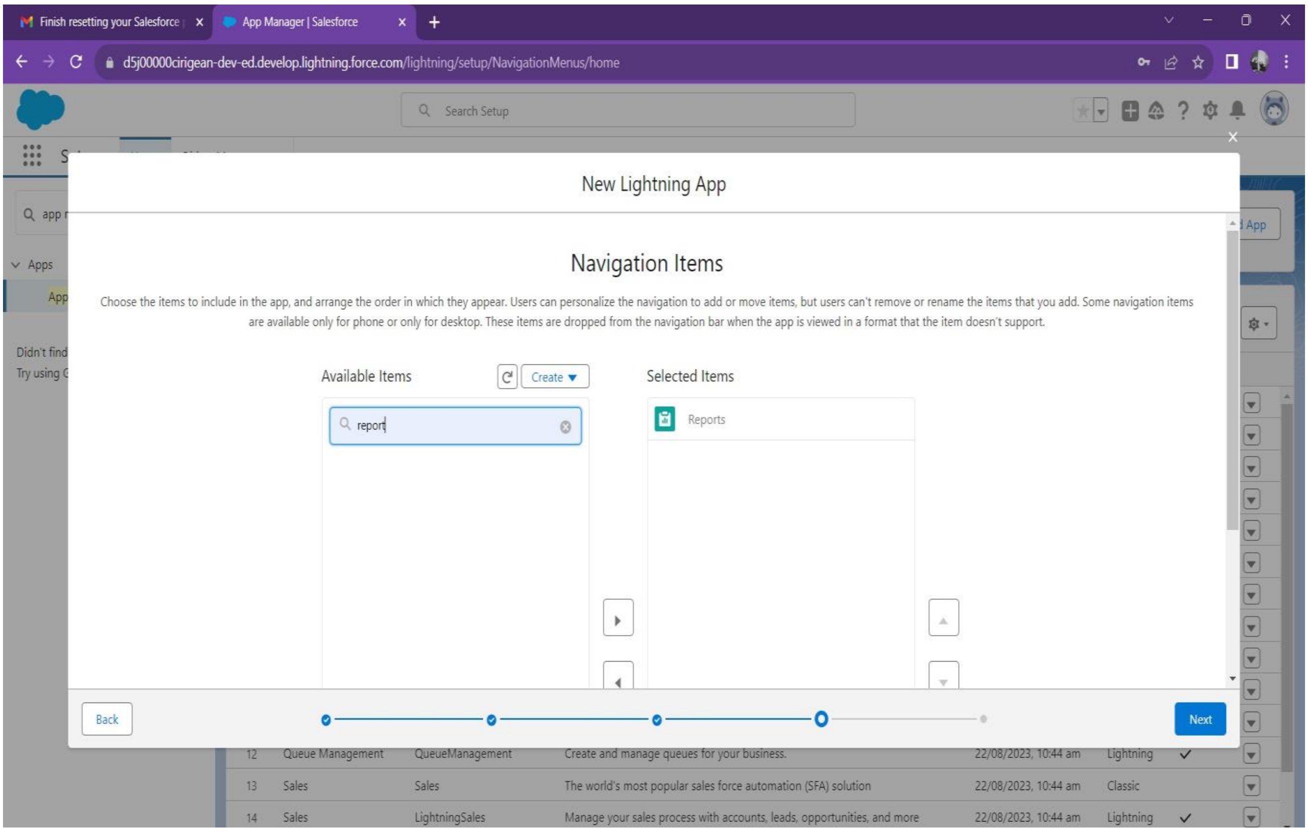
4. Under App Options, leave the default selections and click Next.

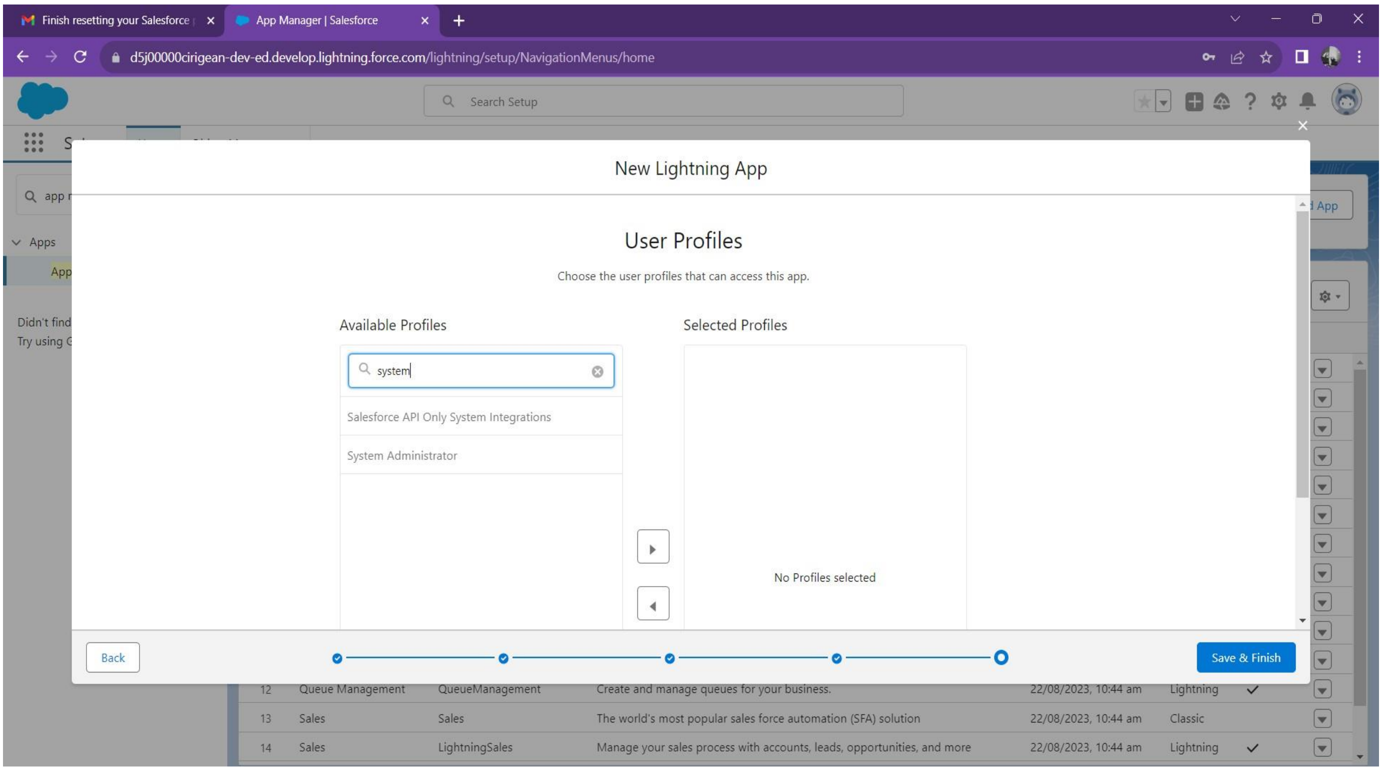
5. Under Utility Items, leave as is and click Next.

6. From Available Items, select Schools, Students, Parents, Reports, and Dashboards and move them to Selected Items. Click Next.

7. From Available Profiles, select System Administrator and move it to Selected Profiles Click Save & Finish.




New Lightning App
Navigation Items
Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.
Available Items
Create
report
Selected Items
Reports
Back
Next



To verify your changes, click the App Launcher, type School Management and select the School Management app.

Note:

- App Launcher-Displays available apps.
- App Name-Displays the current selected app.

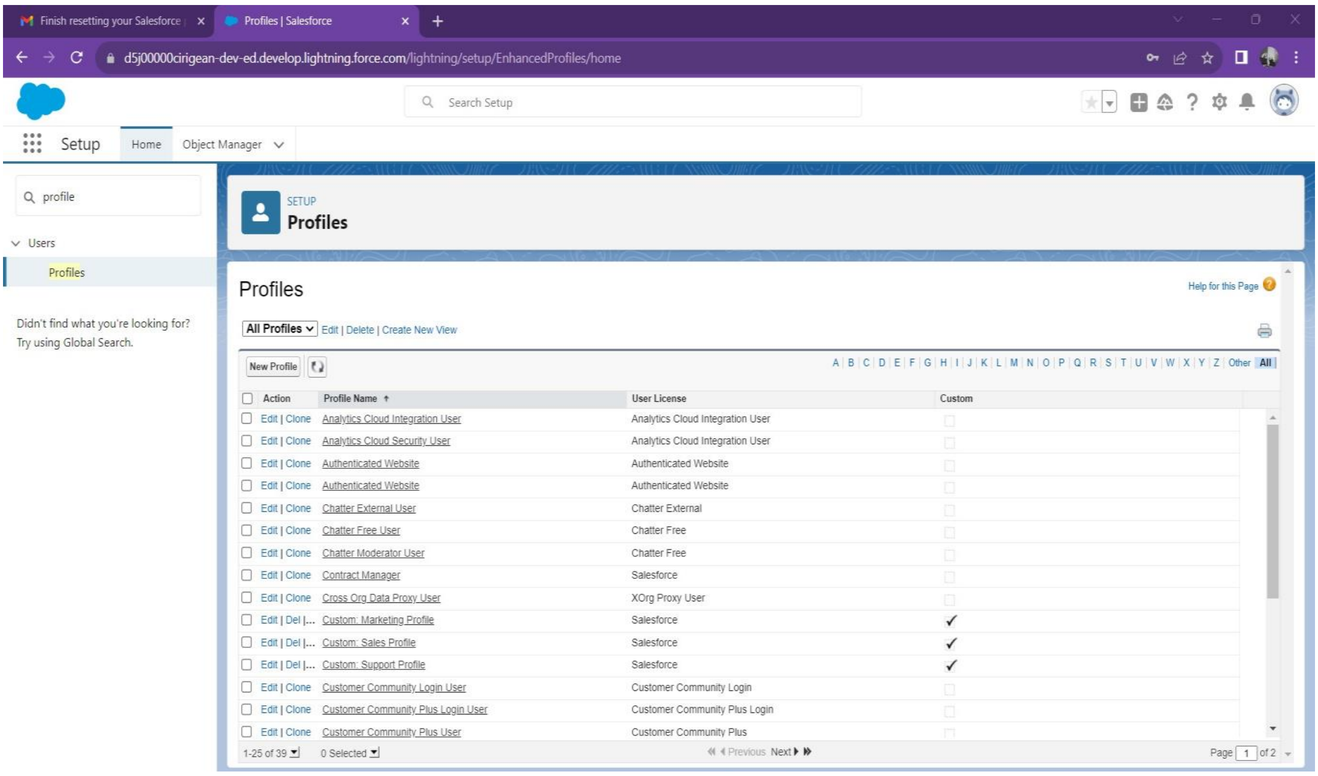
Navigation menu -Displays the tabs available inside the app

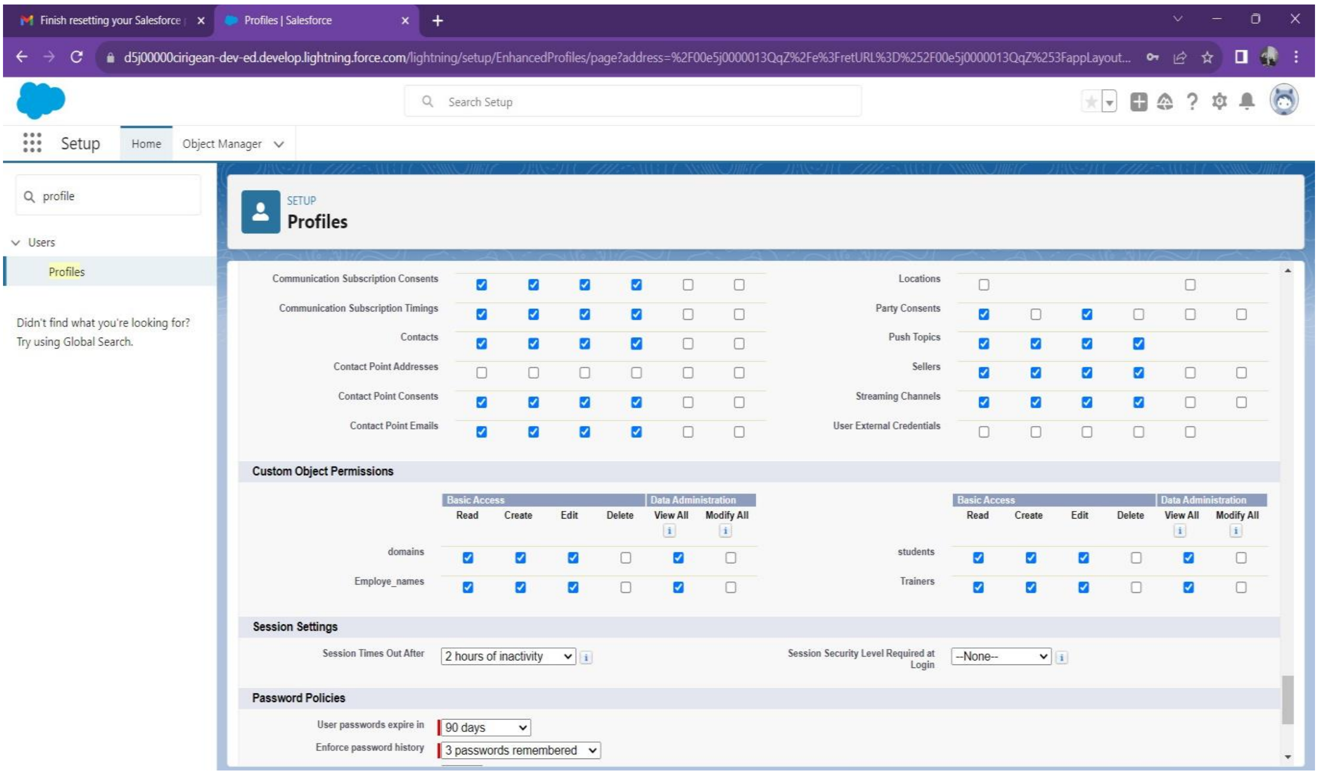
CHAPTER-6
CREATION OF PROFILE

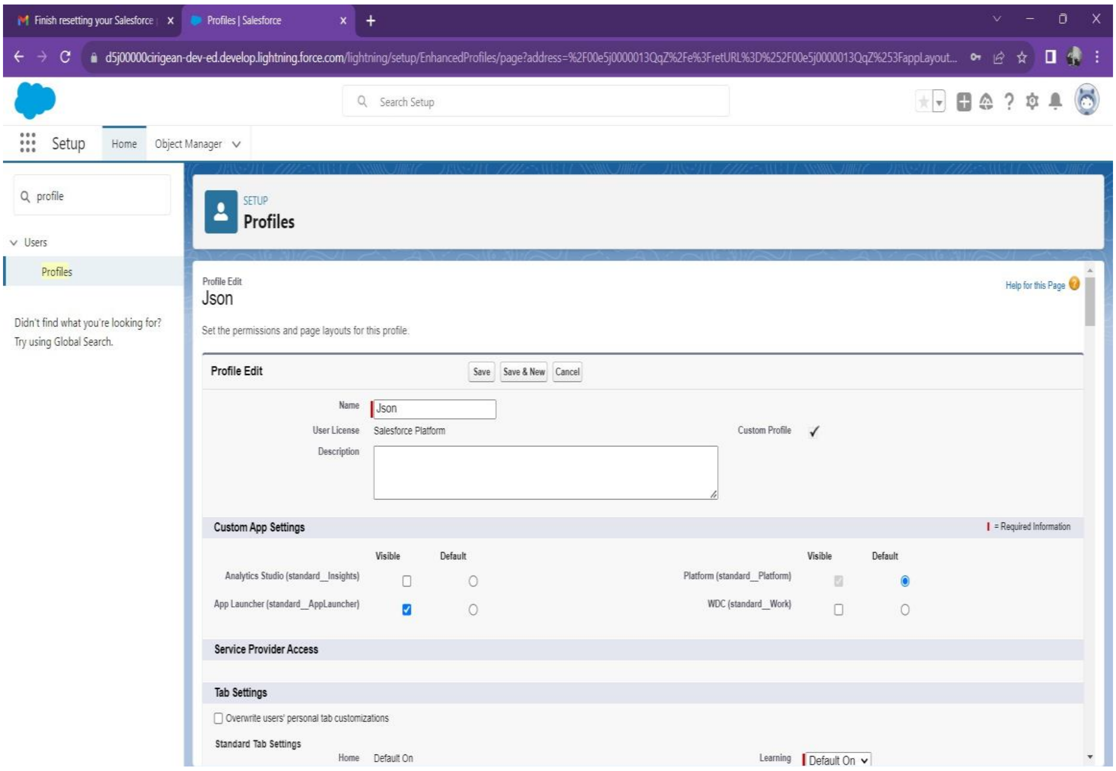
Creation on profile:

Profile:

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. A profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges.



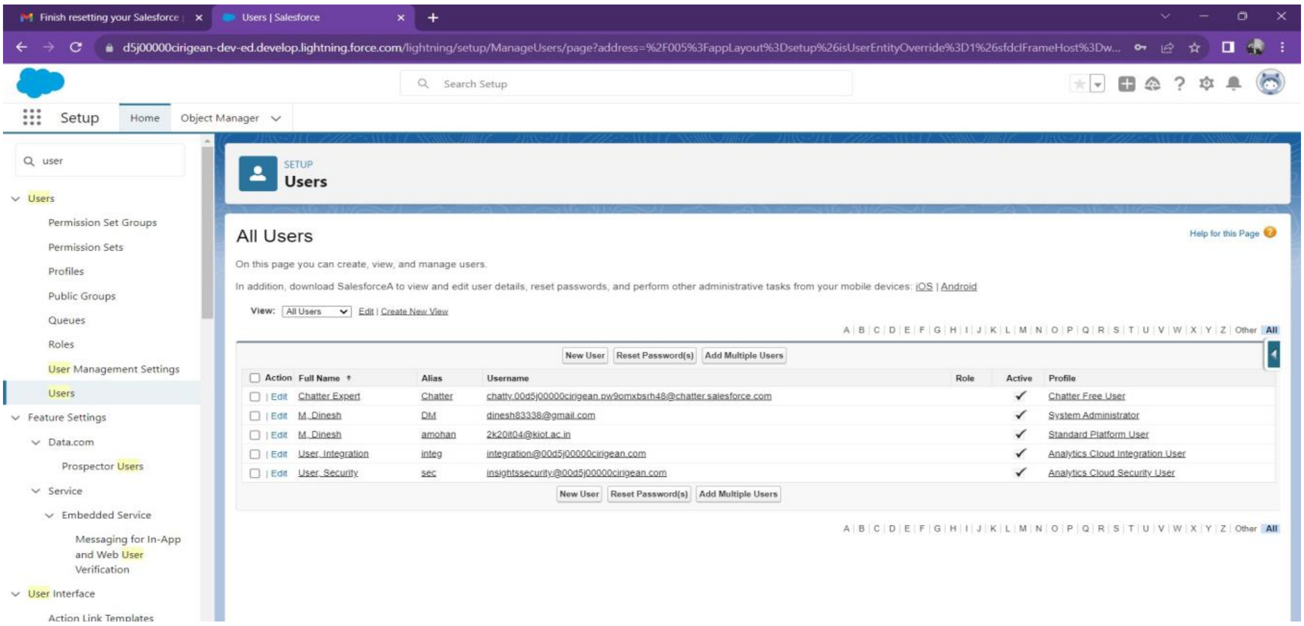


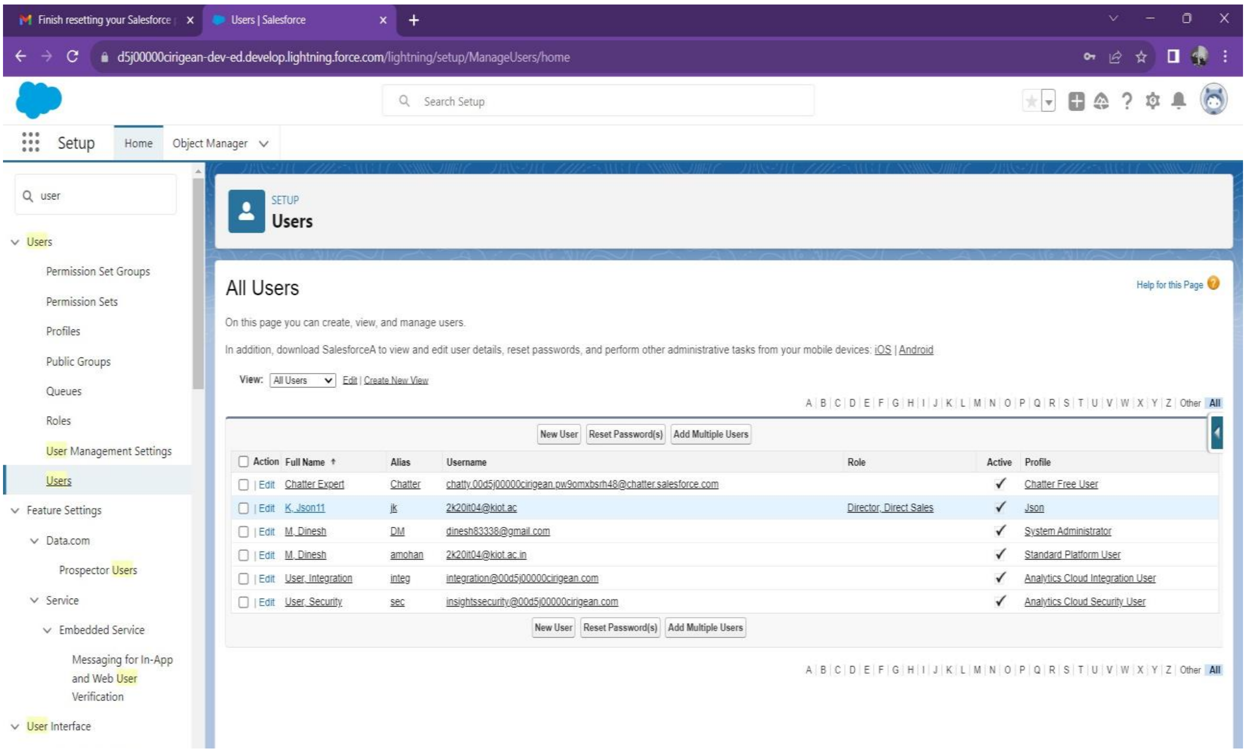


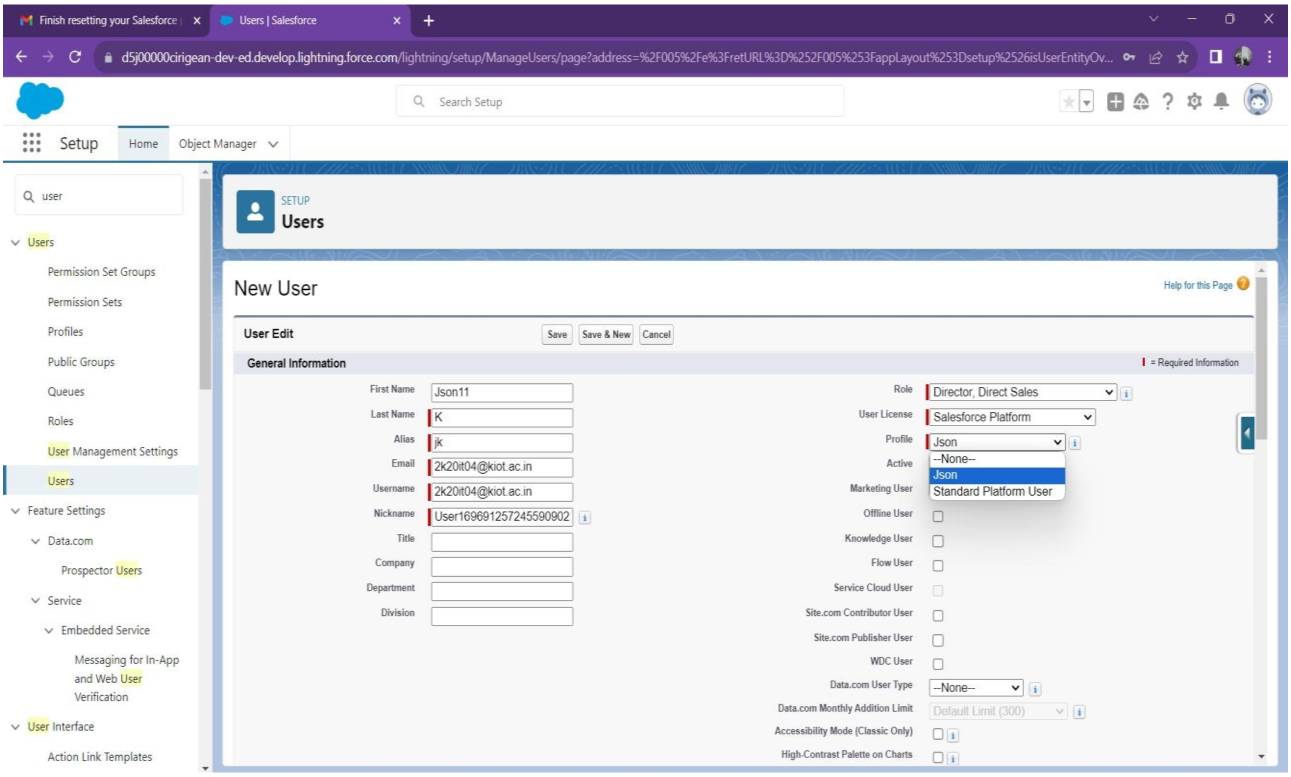
CHAPTER -7
CREATION OF USER

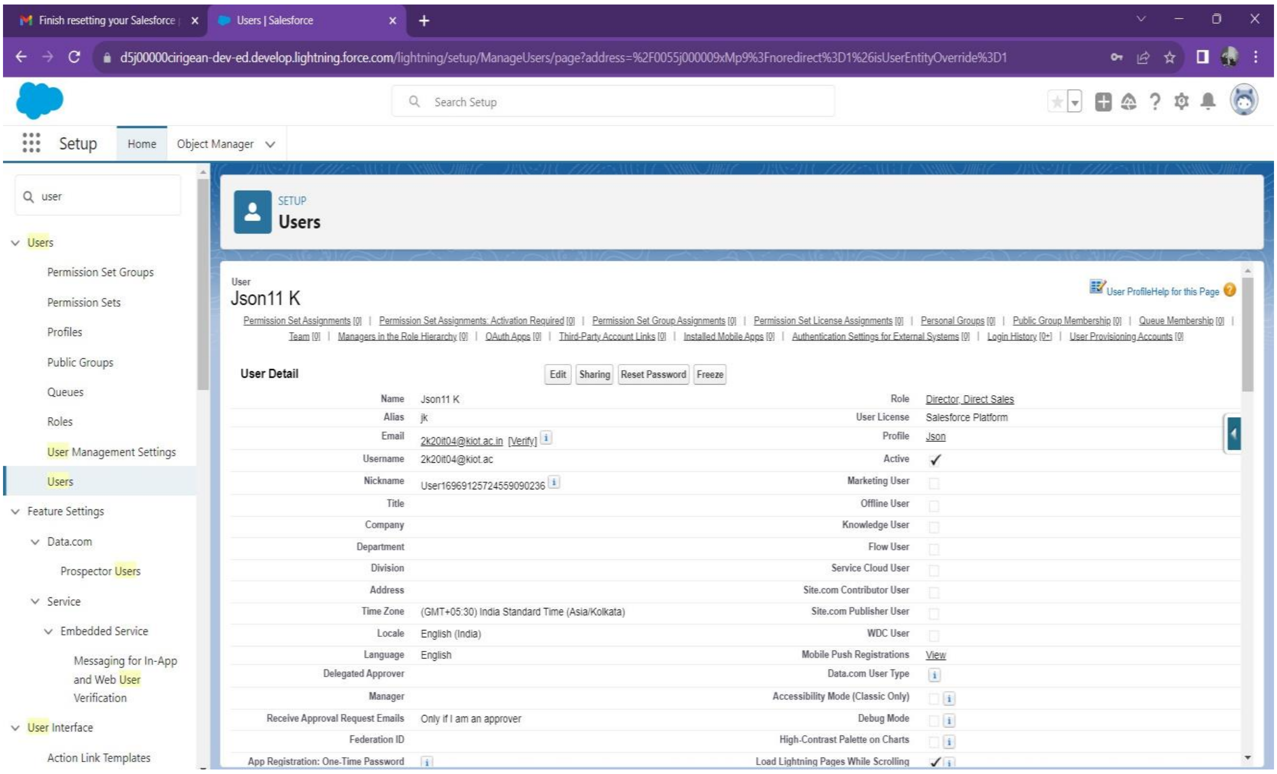
Creating A User:

1. From Setup, in the Quick Find box, enter Users.
2. Select Users.
3. Click New User.
4. Enter the user’s name Parents and (Your) email address and a unique username in the form of an email address.
5. By default, the username is the same as the email address.
6. Select a User License as salesforce.
7. Select a profile as a Store profile.
8. Check Generate new password and notify the user immediately to have the user’s login name and a temporary password emailed to your email.
9. Similarly follow the above steps and create 2 users as Teachers and principals.









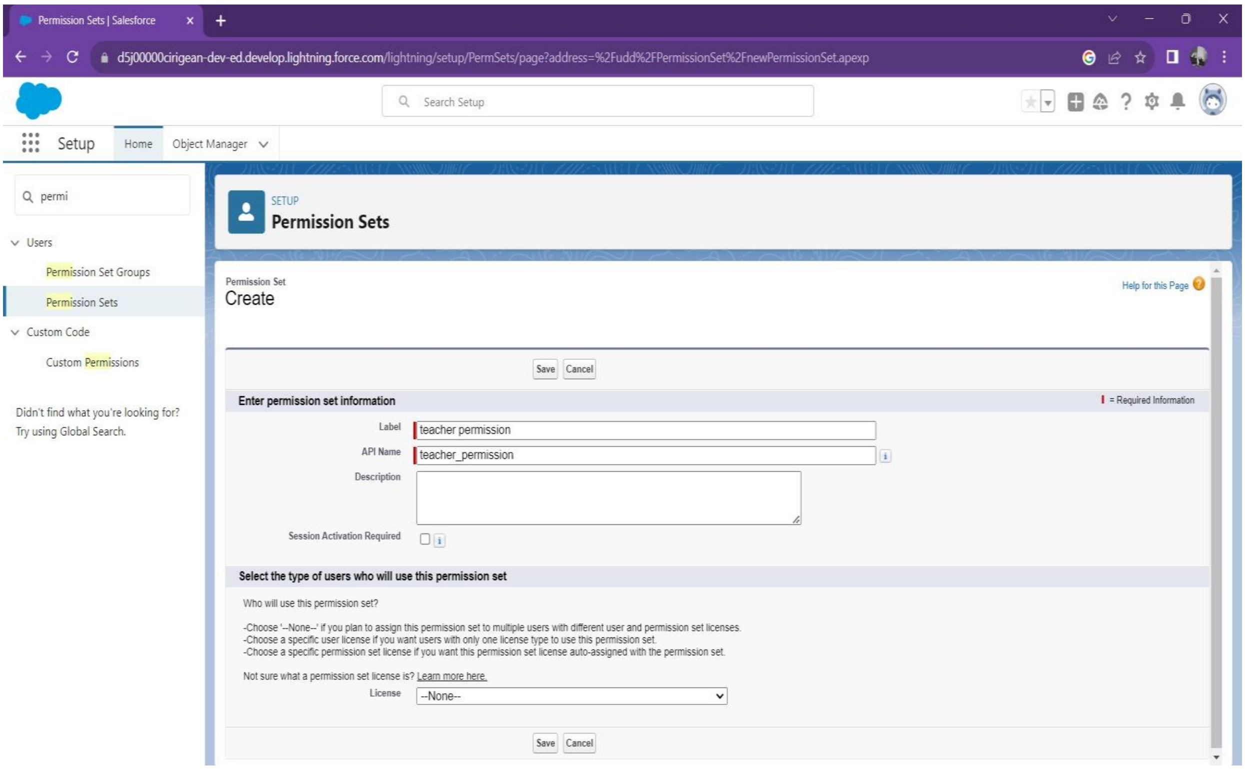
CHAPTER -8
PERMISSION SET

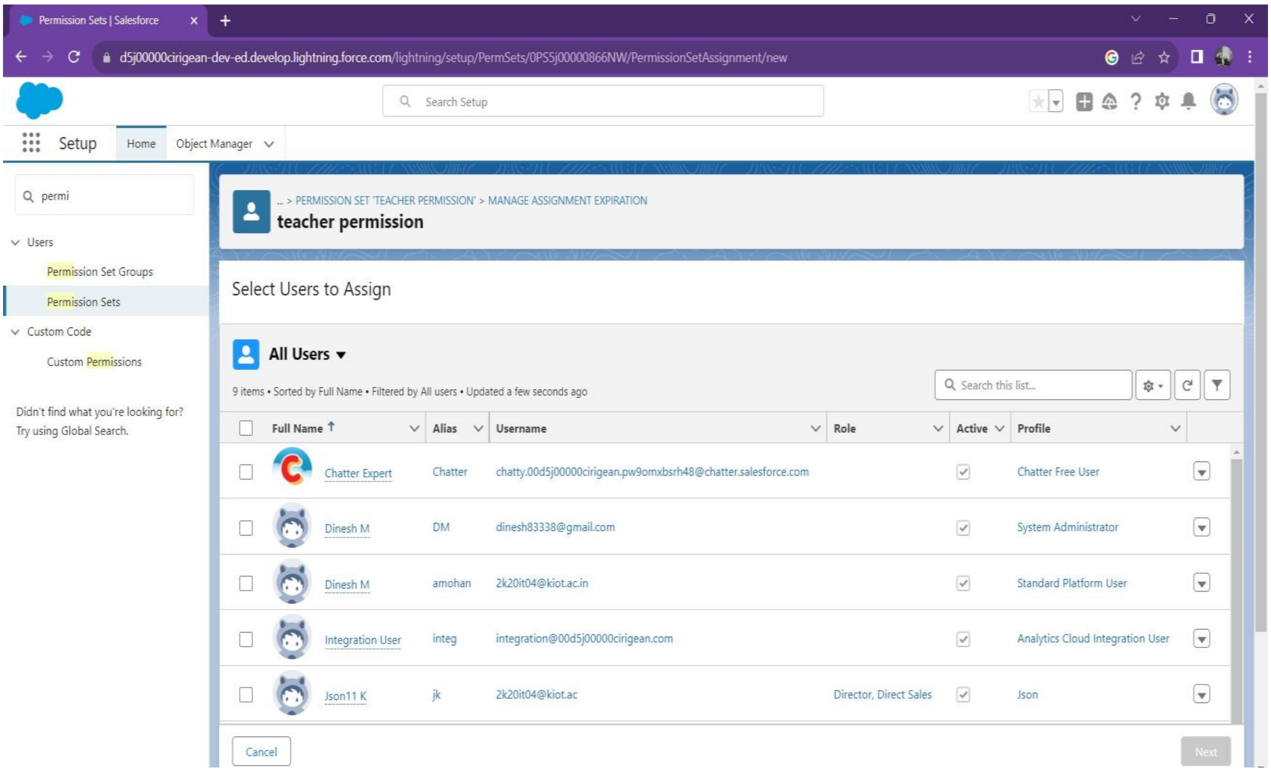
Permission Sets

A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without changing their profiles.

1)Create a Permission Set:

1. From Setup, enter Permission Sets in the Quick Find box, then select Permission Sets.
2. Click New.
3. Give the name of the Permission set name as teacher permission.
4. Under the object settings give the view create and edit permissions to all 3 custom objects (By click open the object)
5. Click on manage assignment
6. Click on add assignment.
7. Click on Teacher (user), Next, Assign.


Permission Sets | Salesforce
d5j00000cirigean-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudd%2FPermissionSet%2FnewPermissionSet.apexp
Search Setup
Setup
Home
Object Manager
permi
Users
Permission Set Groups
Permission Sets
Custom Code
Custom Permissions
Didn't find what you're looking for? Try using Global Search.
SETUP
Permission Sets
Permission Set
Create
Help for this Page
Save
Cancel
Enter permission set information
= Required Information
Label
teacher permission
API Name
teacher_permission
Description
Session Activation Required
Select the type of users who will use this permission set
Who will use this permission set?
-Choose '--None--' if you plan to assign this permission set to multiple users with different user and permission set licenses.
-Choose a specific user license if you want users with only one license type to use this permission set.
-Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.
Not sure what a permission set license is? Learn more here.
License
--None--
Save
Cancel



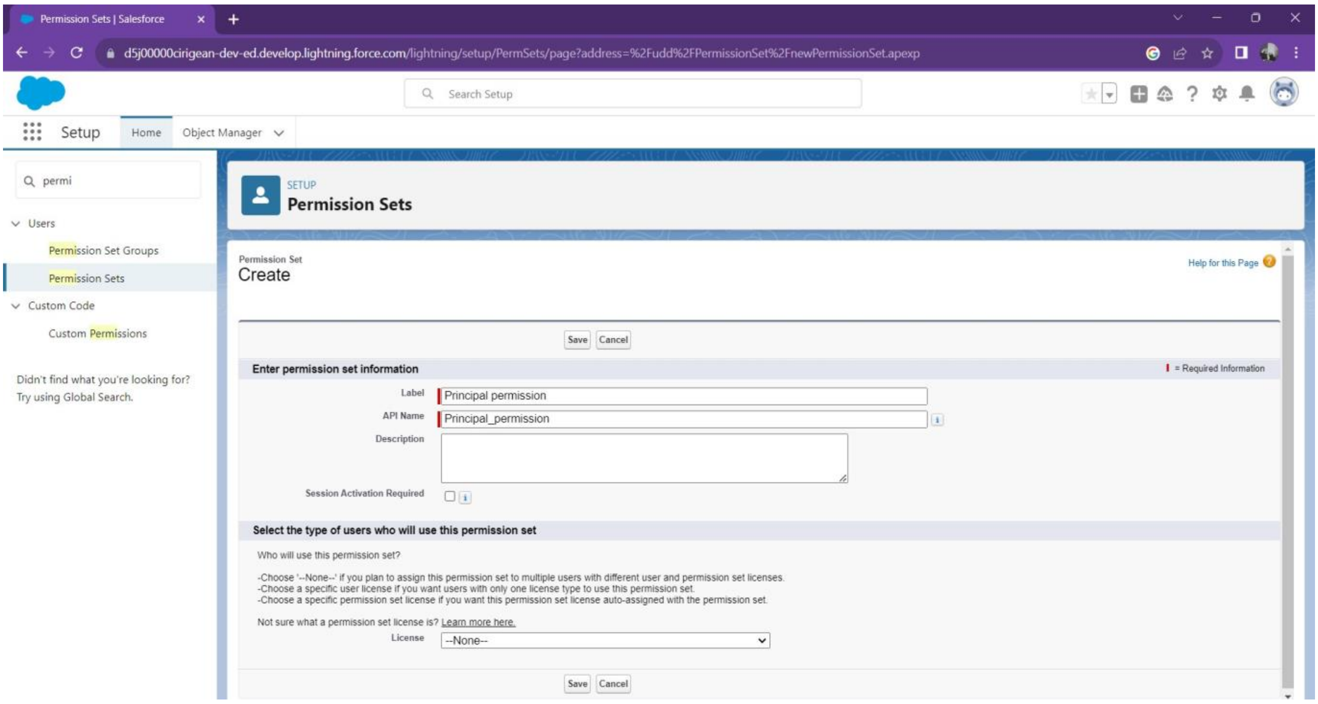
Create A Another Permission Set:

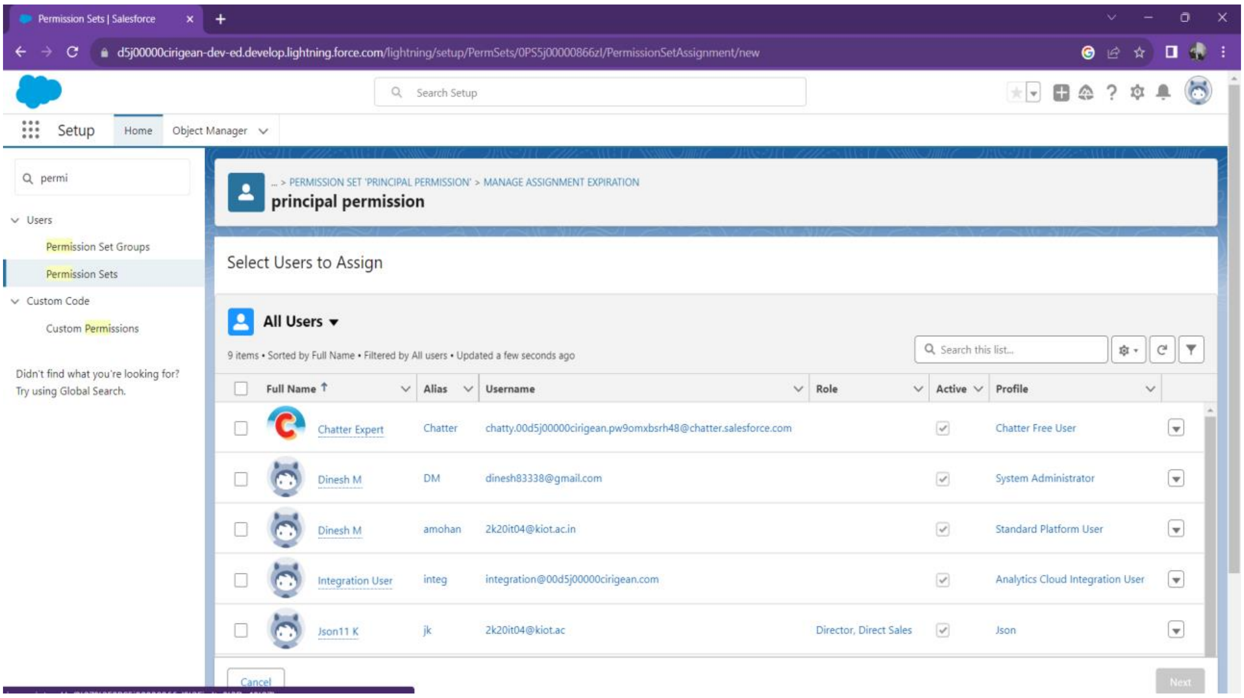
Permission sets 2:

1. From Setup, enter Permission Sets in the Quick Find box, then select Permission Sets.

2. Click New.

Principal permission:



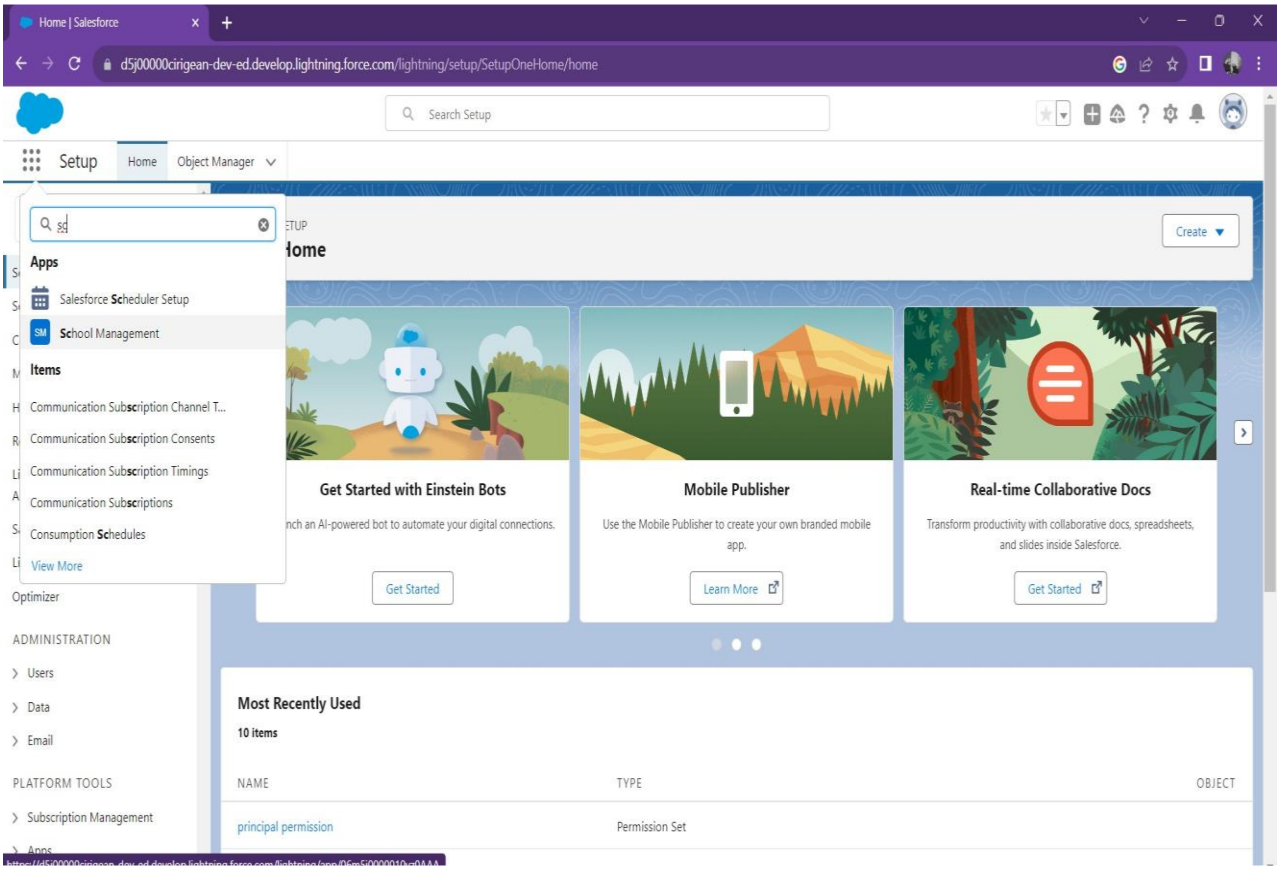

Permission Sets | Salesforce
d5j00000cirigean-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/0PS5j00000866zl/PermissionSetAssignment/new
Search Setup
Setup
Home
Object Manager
permi
Users
Permission Set Groups
Permission Sets
Custom Code
Custom Permissions
Didn't find what you're looking for?
Try using Global Search.
... > PERMISSION SET 'PRINCIPAL PERMISSION' > MANAGE ASSIGNMENT EXPIRATION
principal permission
Select Users to Assign
All Users
9 items • Sorted by Full Name • Filtered by All users • Updated a few seconds ago
Search this list...
Full Name
Alias
Username
Role
Active
Profile
Chatter Expert
Chatter
chatty.00d5j00000cirigean.pw9omxbsrh48@chatter.salesforce.com
Chatter Free User
Dinesh M
DM
dinesh83338@gmail.com
System Administrator
Dinesh M
amohan
2k20it04@kiot.ac.in
Standard Platform User
Integration User
integ
integration@00d5j00000cirigean.com
Analytics Cloud Integration User
Json11 K
jk
2k20it04@kiot.ac
Director, Direct Sales
Json
Cancel
Next

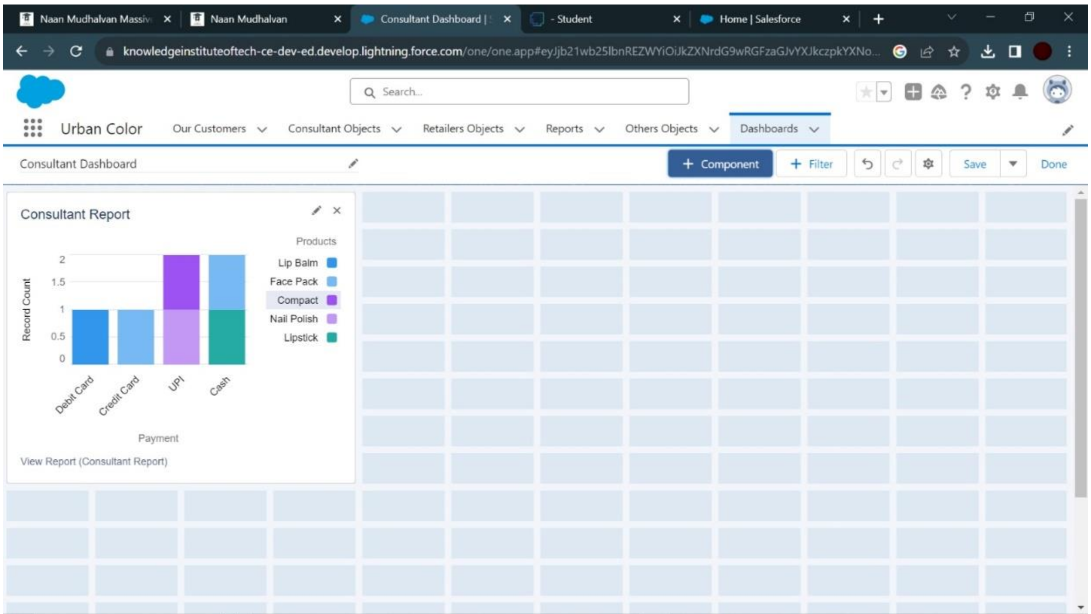
CHAPTER -9
USER ADOPTION

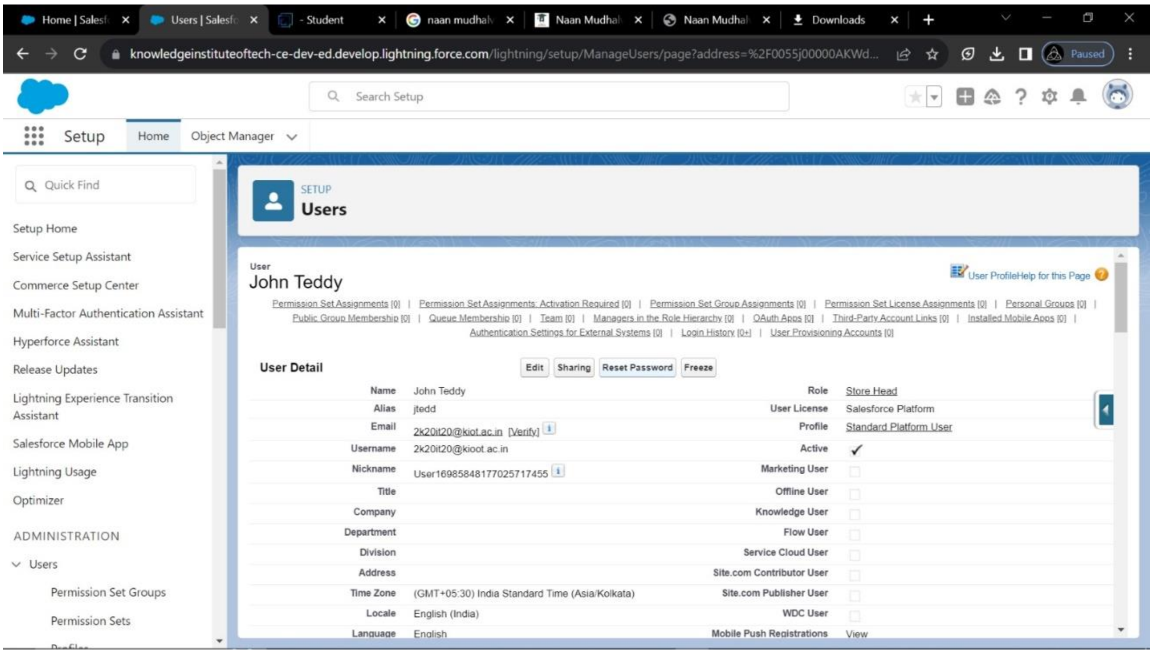
Create Record (Store)

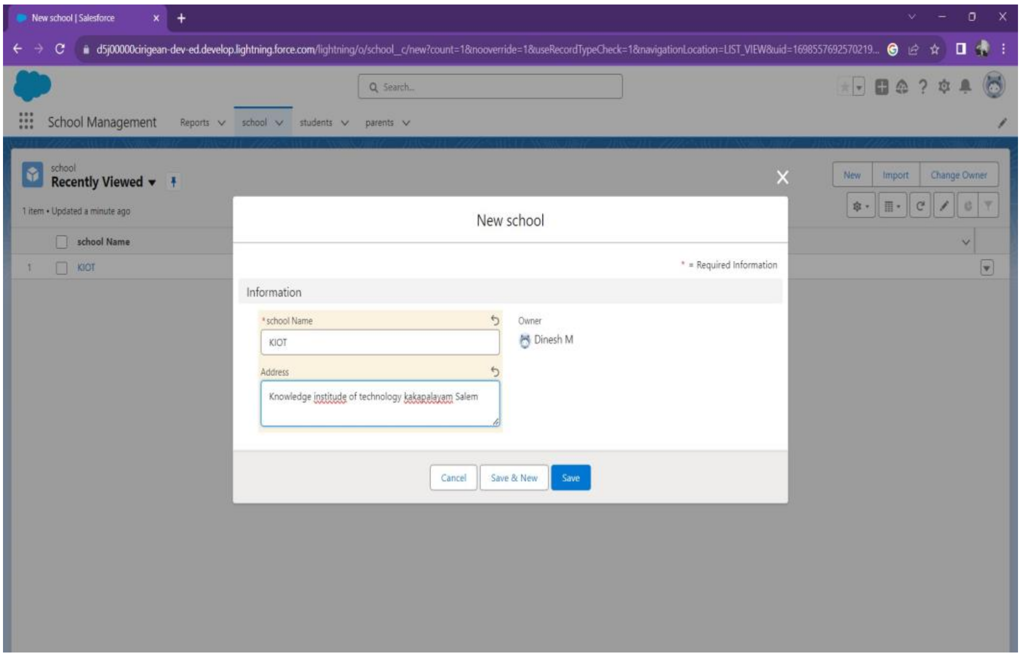
Create Record (**Store**):

1. Click on App Launcher on left side of screen.
2. Search **Cosmetics Store**& click on it.
3. Click on **Store** tab.
4. Click new button
5. Fill all Store record details.
6. Click on Save Button



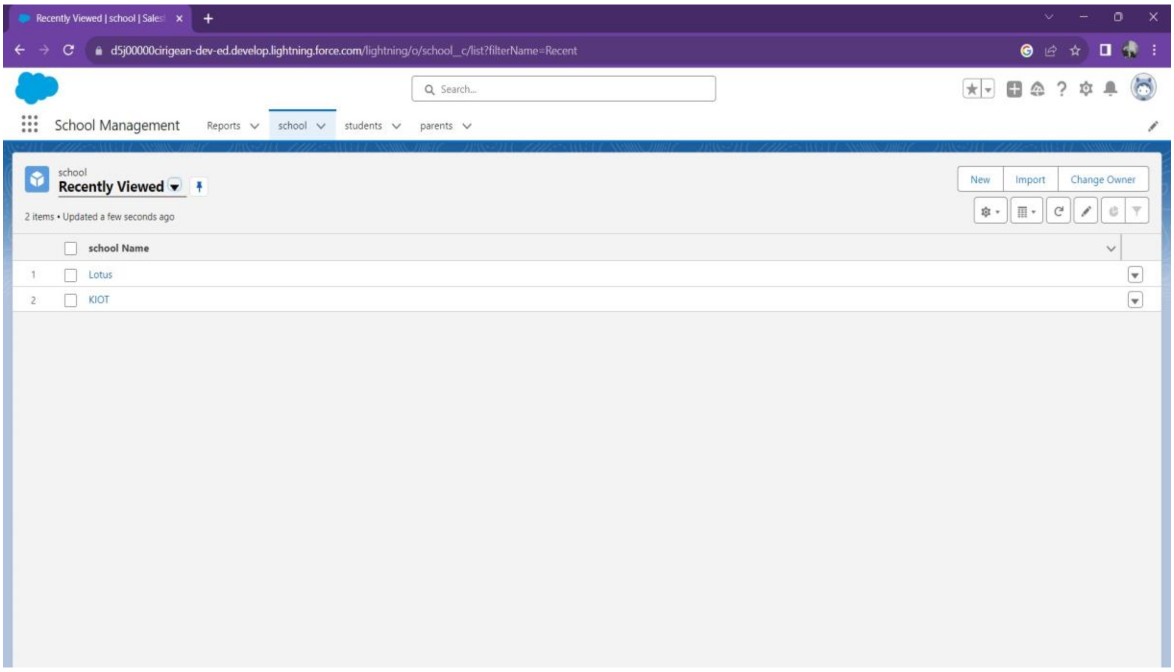

Naan Mudhalvan Massiv
Naan Mudhalvan
Consultant Dashboard
- Student
Home | Salesforce
knowledgeinstituteoftech-ce-dev-ed.develop.lightning.force.com/one/one.app#eyJjb21wb25lbnREZWYiOiJkZXNrdG9wRGFzaGJvYXJkczpkYXNo...
Search...
Urban Color
Our Customers
Consultant Objects
Retailers Objects
Reports
Others Objects
Dashboards
Consultant Dashboard
+ Component
+ Filter
Save
Done
Consultant Report
Products
Lip Balm
Face Pack
Compact
Nail Polish
Lipstick
Record Count
2
1.5
1
0.5
0
Debit Card
Credit Card
UPI
Cash
Payment
View Report (Consultant Report)


Home | Salesf
Users | Salesf
- Student
naan mudhalv
Naan Mudhal
Naan Mudhal
Downloads
knowledgeinstituteoftech-ce-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F0055j00000AKWd...
Paused
Search Setup
Setup
Home
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Commerce Setup Center
Multi-Factor Authentication Assistant
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
SETUP
Users
User
John Teddy
User ProfileHelp for this Page
Permission Set Assignments [0] | Permission Set Assignments: Activation Required [0] | Permission Set Group Assignments [0] | Permission Set License Assignments [0] | Personal Groups [0] |
Public Group Membership [0] | Queue Membership [0] | Team [0] | Managers in the Role Hierarchy [0] | OAuth Apps [0] | Third-Party Account Links [0] | Installed Mobile Apps [0] |
Authentication Settings for External Systems [0] | Login History [0+] | User Provisioning Accounts [0]
User Detail
Edit
Sharing
Reset Password
Freeze
Name John Teddy
Alias jtedd
Email 2k20it20@kiot.ac.in [Verify]
Username 2k20it20@kioot.ac.in
Nickname User16985848177025717455
Title
Company
Department
Division
Address
Time Zone (GMT+05:30) India Standard Time (Asia/Kolkata)
Locale English (India)
Language English
Role Store Head
User License Salesforce Platform
Profile Standard Platform User
Active
Marketing User
Offline User
Knowledge User
Flow User
Service Cloud User
Site.com Contributor User
Site.com Publisher User
WDC User
Mobile Push Registrations View



View Record (Store):

1. Click on App Launcher on left side of screen.
2. Search Cosmetics store App & click on it.
3. Click on Store Tab.
4. Click on any record name. you can see the details of the Store.



Delete Record (Store)

1. Click on App Launcher on left side of screen.
2. Search **Cosmetics store App** & click on it.
3. Click **on Store** Tab.
4. Click on Arrow at right hand side on that Particular record.
5. Click delete and delete again.

CHAPTER -10
REPORT

Reports:

Reports in Salesforce is a list of records that meet a particular criterion which gives a particular question. These records are displayed as a table that can be filtered or grouped based on the report they can find any field in the report.

There are 4 types of report formats in Salesforce:

Tabular Reports:

This is the most basic report format. It just displays the row of records in a table with a grand total. While easy to set up they can’t be used to create groups of data or charts and also cannot be used in Dashboards.

Summary Reports:

It is the most commonly used type of report. It allows grouping of rows of data, view subtotal, and create charts.

Matrix Report:

It is the most complex report format. Matrix report summarizes information in a grid format. It allows records to be grouped by both columns and rows.

Joined Reports:

These types of reports let us create different views of data from multiple report types. The data is joined reports are organized in blocks.

Report types:

Report type determines which set of records will be available in a report. Every report is based on a particular report type.

1.Standard Report Types:

Standard Report Types are automatically included with standard objects and also with custom objects where "Allow Reports" is checked.

Standard report types cannot be customized and automatically include standard and custom fields for each object within the report type. Standard report types get created when an object is created, also when a relationship is created.

Custom Report Types:

Custom Reports are created by an administrator or User with "Manage Custom Report Types" permission. Custom report types are created when standard report types cannot specify which records will be available on reports.
There are 3 types of access levels of folders:

Viewer:

With this access level, users can see the data in a report but cannot make any changes except cloning it into a new report.

Editor:

With this access level, users can view and modify the reports it contains and can also move them to/from any other folders they have access level as Editor or Manager.

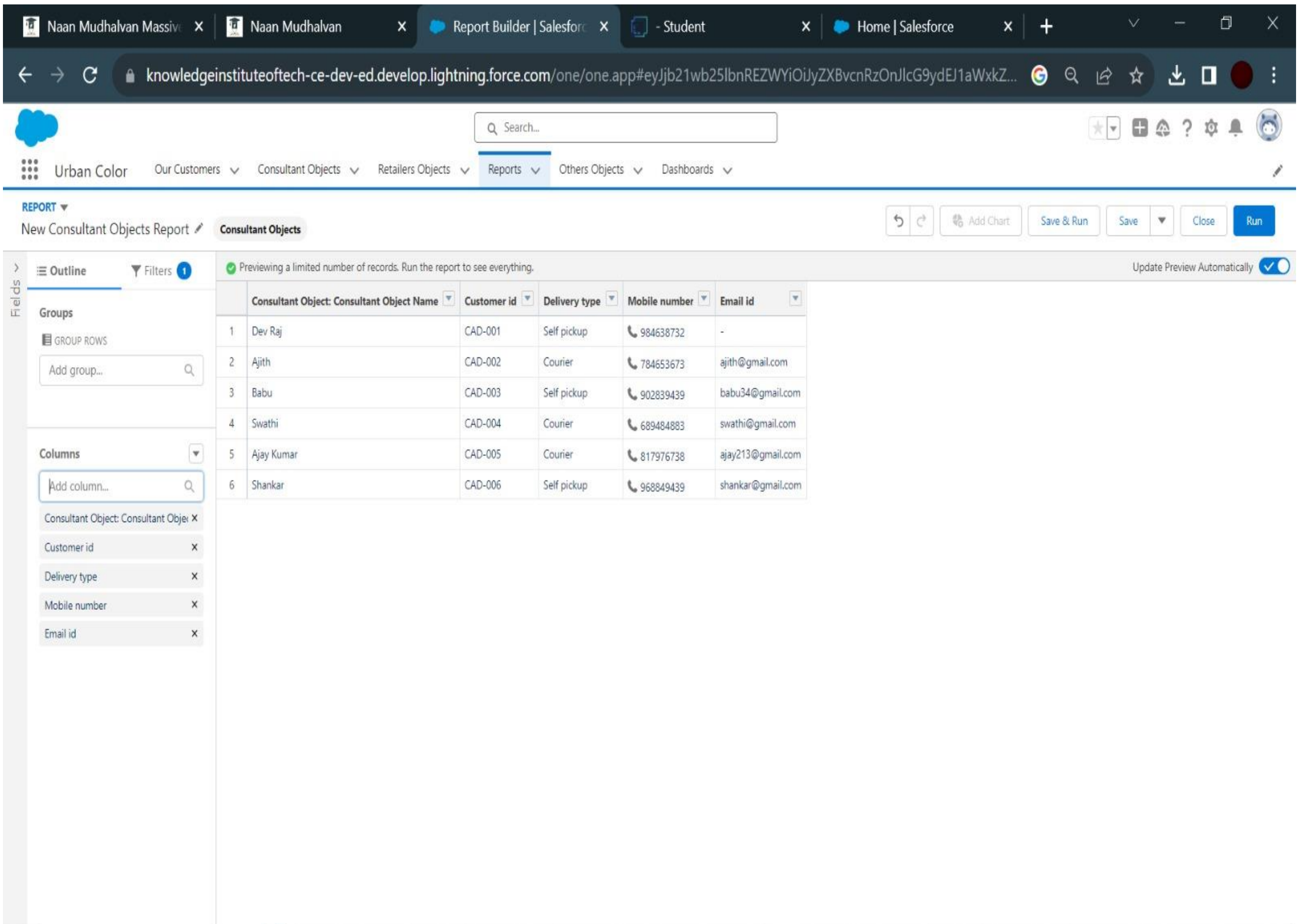
Manager:

With this access level, users can do everything Viewers & Editors can do, plus they can also control other user's access levels to this folder.

Create Report:

Reports:

1. In School Management App click Reports tab.
2. Click New Report.
3. Select the report type as School with students and parents for the report.
4. Click start report.
5. Customize your report, then save and run
6. Give report name – Schools with Students Report
7. Click Save


Naan Mudhalvan Massiv
Naan Mudhalvan
Report Builder | Salesforc
- Student
Home | Salesforce
knowledgeinstituteoftech-ce-dev-ed.develop.lightning.force.com/one/one.app#eyJjb21wb25lbnREZWYiOiJyZXBvcnRzOnJlcG9ydEJ1aWxkZ...
Search...
Urban Color
Our Customers
Consultant Objects
Retailers Objects
Reports
Others Objects
Dashboards
REPORT
New Consultant Objects Report
Consultant Objects
Add Chart
Save & Run
Save
Close
Run
Outline
Filters
Previewing a limited number of records. Run the report to see everything.
Update Preview Automatically
Groups
GROUP ROWS
Add group...
Columns
Add column...
Consultant Object: Consultant Objec
Customer id
Delivery type
Mobile number
Email id
Consultant Object: Consultant Object Name
1 Dev Raj CAD-001 Self pickup 984638732 -
2 Ajith CAD-002 Courier 784653673 ajith@gmail.com
3 Babu CAD-003 Self pickup 902839439 babu34@gmail.com
4 Swathi CAD-004 Courier 689484883 swathi@gmail.com
5 Ajay Kumar CAD-005 Courier 817976738 ajay213@gmail.com
6 Shankar CAD-006 Self pickup 968849439 shankar@gmail.com

CHAPTER -11
TRIGGERS

Triggers:

A trigger refers to an Apex code that is automatically executed before or after certain events occur in the Salesforce platform, such as when a record is inserted, updated, deleted, or undeleted. Triggers are useded to get the chance for an automate business processes.

A before trigger in Salesforce is executed before the records are actually inserted, updated, or deleted in the Salesforce database. This allows the trigger to perform certain actions or validations before the data is saved to the database.

Create An Apex Trigger:

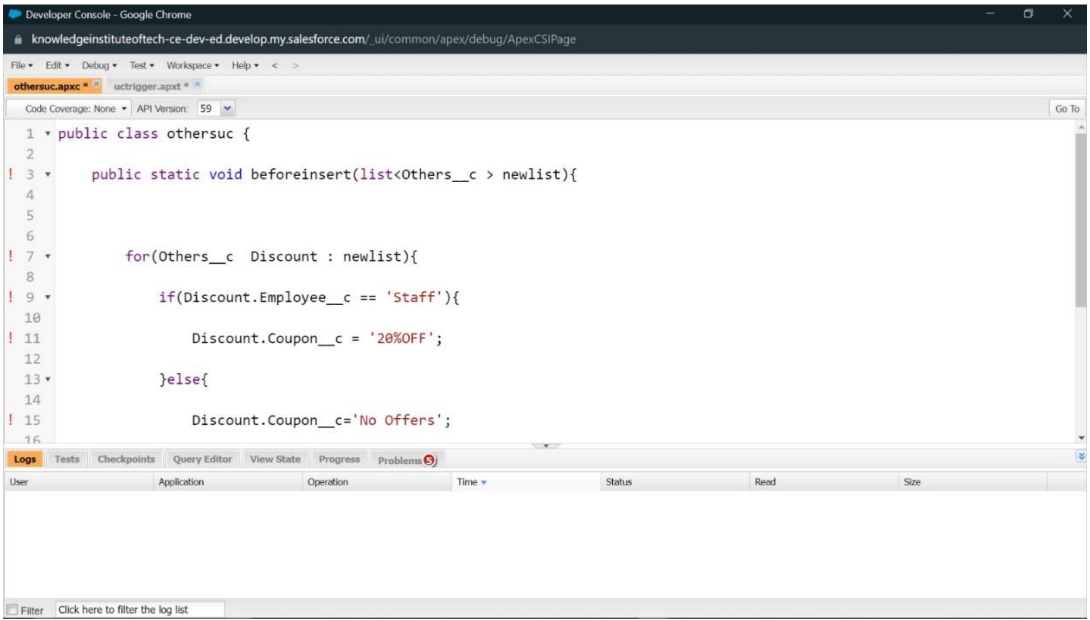
Write a trigger whenever the school website is null you should be unable to delete the record.

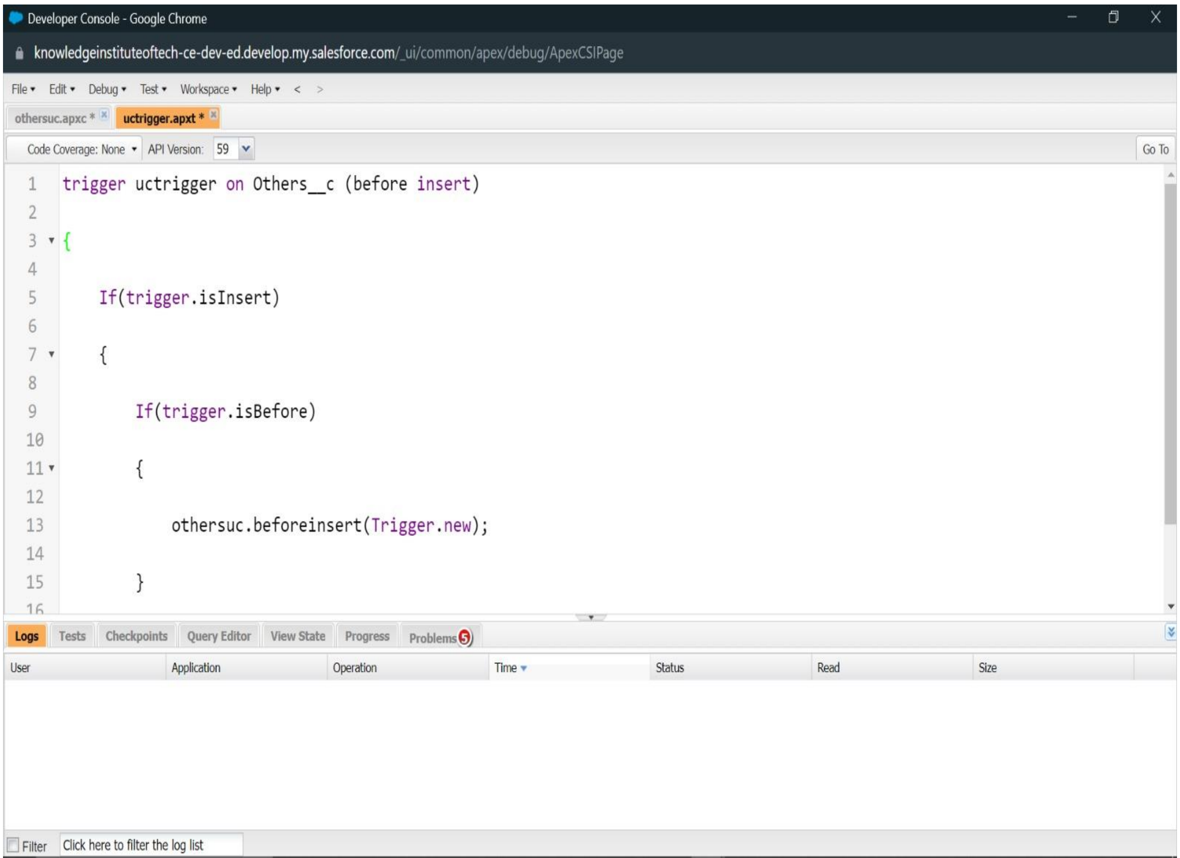
1. Go to the gear icon and select the developer console.
2. From the menu bar click on file and select Apex class.
3. Now give the class name as StorelHandler
4. Now Write the below code.

```
public class storeHandler {

  public static void beforeDelete(list<Storec> oldlist){

    for(Store__c s : oldlist){

      if(s.Storewebsite__c == null ){

        s.addError('you cannot delete the record');

      }
```

1.From the menu bar click on file and select Apex trigger.
2.Now give the trigger name as Internalmarks
3.Now write the below code

```
trigger StoreTrigger on Store__c (before delete) {
    if(trigger.isDelete){
        if(trigger.isBefore){
            storeHandler.beforeDelete(trigger.old);
        }
    }
}
```




Developer Console - Google Chrome
knowledgeinstituteoftech-ce-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage
File Edit Debug Test Workspace Help
othersuc.apxc *
uctrigger.apxt *
Code Coverage: None
API Version: 59
Go To
trigger uctrigger on Others__c (before insert)
{
If(trigger.isInsert)
{
If(trigger.isBefore)
{
othersuc.beforeinsert(Trigger.new);
}
Logs
Tests
Checkpoints
Query Editor
View State
Progress
Problems
User
Application
Operation
Time
Status
Read
Size
Filter
Click here to filter the log list

CHAPTER -12
FLOWS

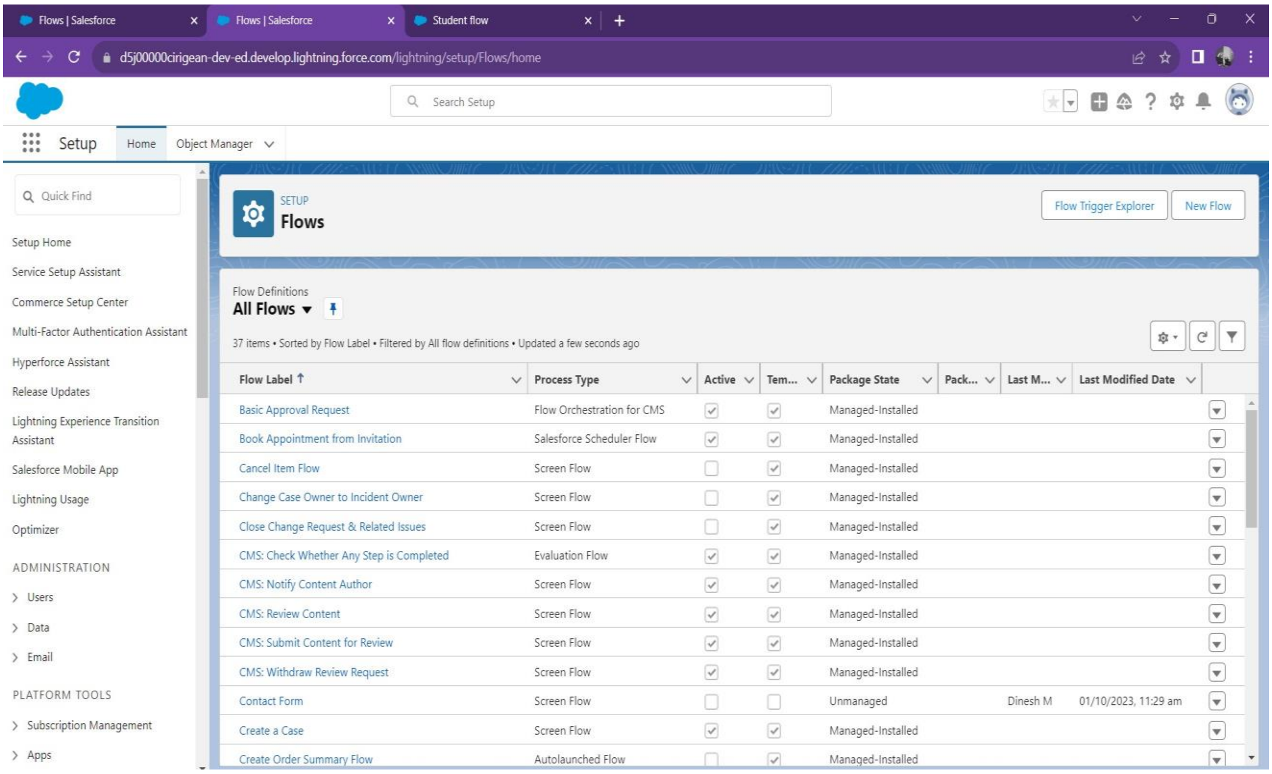
Flows:

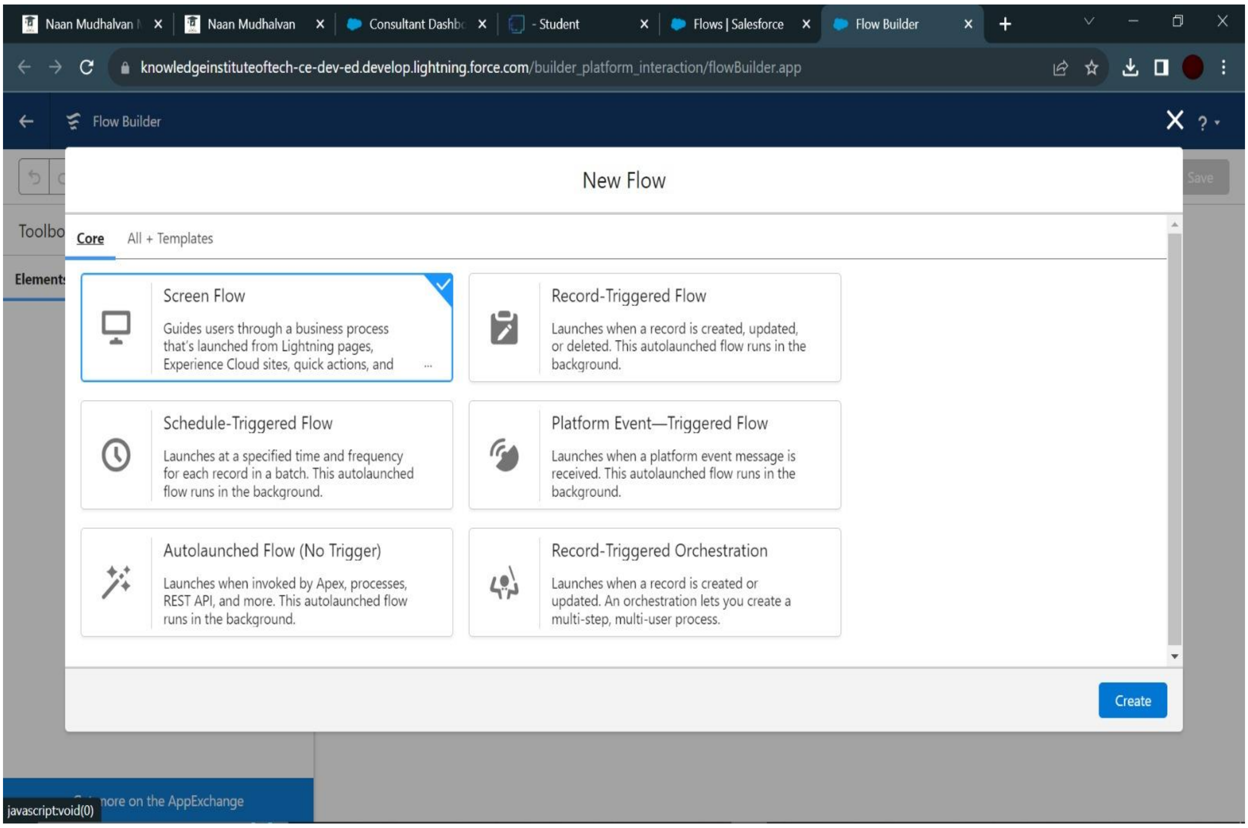
Record-triggered flows are a powerful automation tool in Salesforce that can streamline business processes, reduce manual work, and improve productivity. They can be used to automate a wide range of tasks, from simple to complex, and can be tailored to meet the unique needs of your organization.

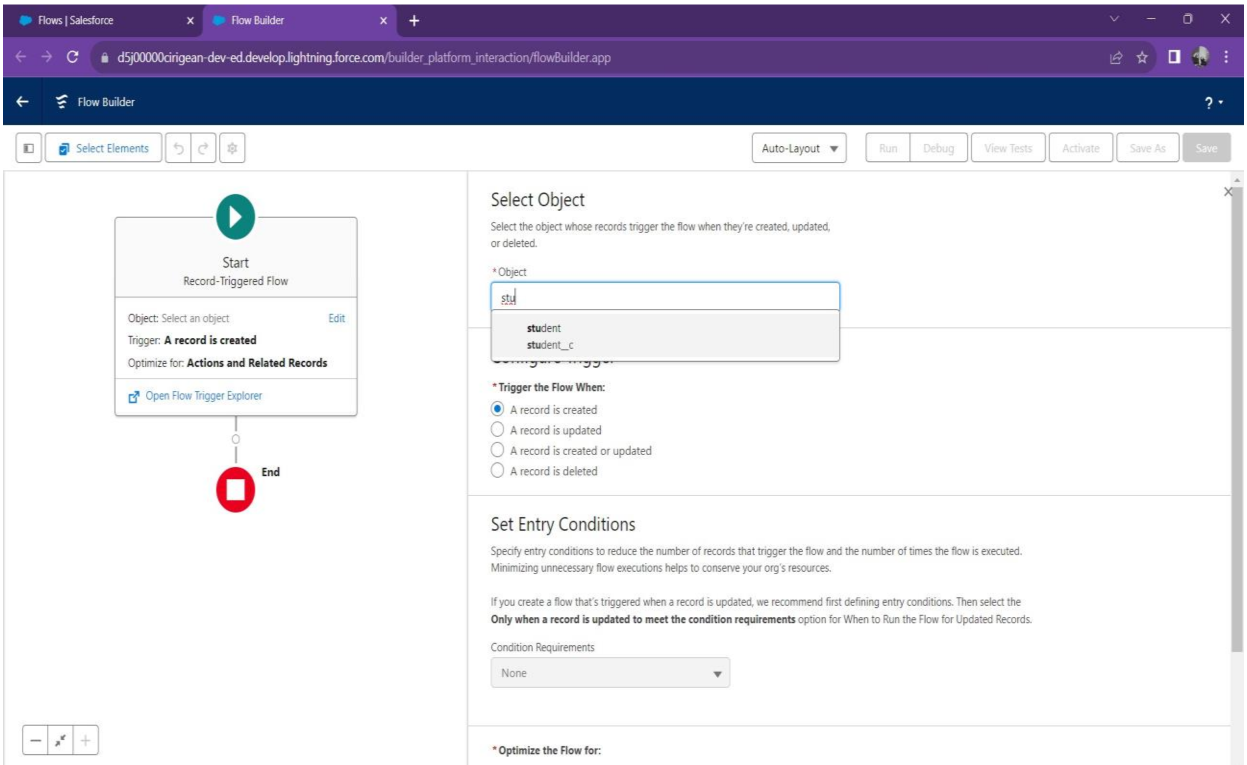
Create Flow

Create a record triggered flow whenever a student record is created it must send the email to the student about their welcome.

Click on the Gear icon and select setup the search icon for the Quick find Box enter flow and select the flows Click on New flow and Select Record triggered Flows.

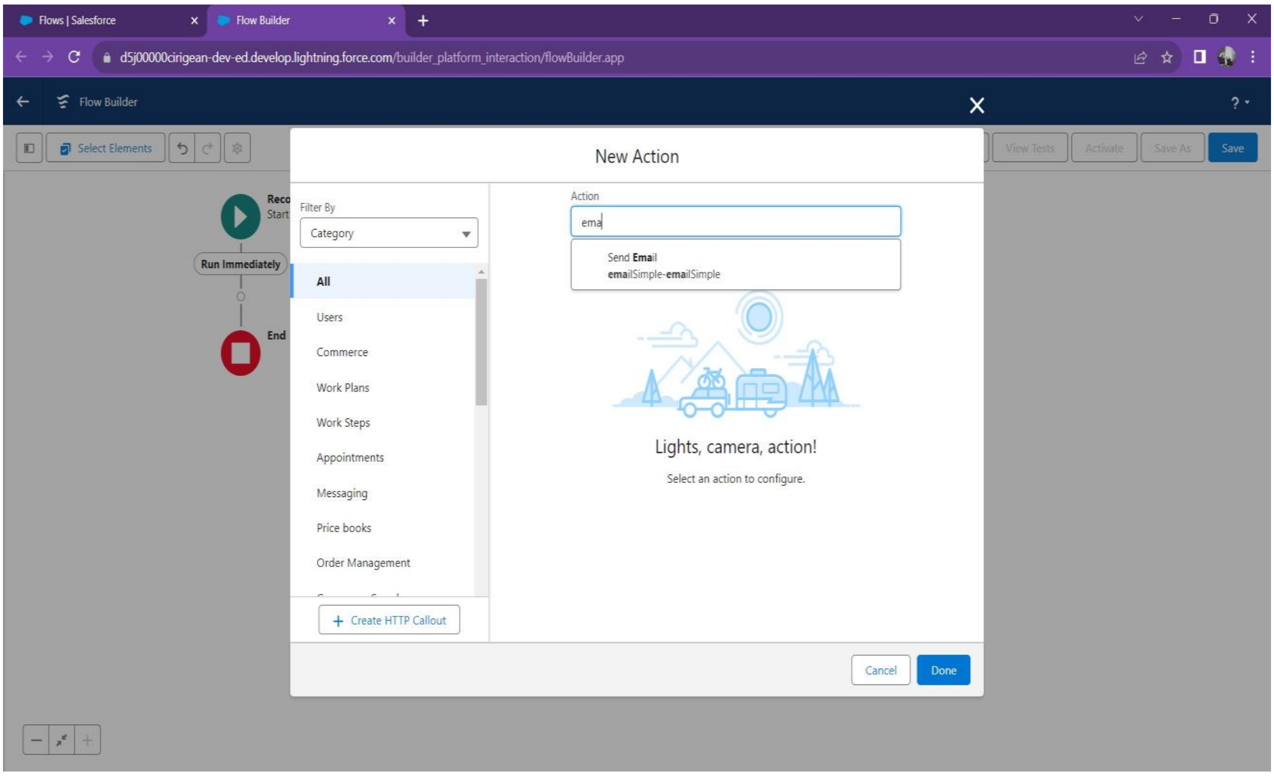

Flows | Salesforce
Flows | Salesforce
Student flow
d5j00000cirigean-dev-ed.develop.lightning.force.com/lightning/setup/Flows/home
Search Setup
Setup
Home
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Commerce Setup Center
Multi-Factor Authentication Assistant
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Data
Email
PLATFORM TOOLS
Subscription Management
Apps
SETUP
Flows
Flow Trigger Explorer
New Flow
Flow Definitions
All Flows
37 items • Sorted by Flow Label • Filtered by All flow definitions • Updated a few seconds ago
Flow Label
Process Type
Active
Tem...
Package State
Pack...
Last M...
Last Modified Date
Basic Approval Request
Flow Orchestration for CMS
Managed-Installed
Book Appointment from Invitation
Salesforce Scheduler Flow
Cancel Item Flow
Screen Flow
Change Case Owner to Incident Owner
Close Change Request & Related Issues
CMS: Check Whether Any Step is Completed
Evaluation Flow
CMS: Notify Content Author
CMS: Review Content
CMS: Submit Content for Review
CMS: Withdraw Review Request
Contact Form
Unmanaged
Dinesh M
01/10/2023, 11:29 am
Create a Case
Create Order Summary Flow
Autolaunched Flow

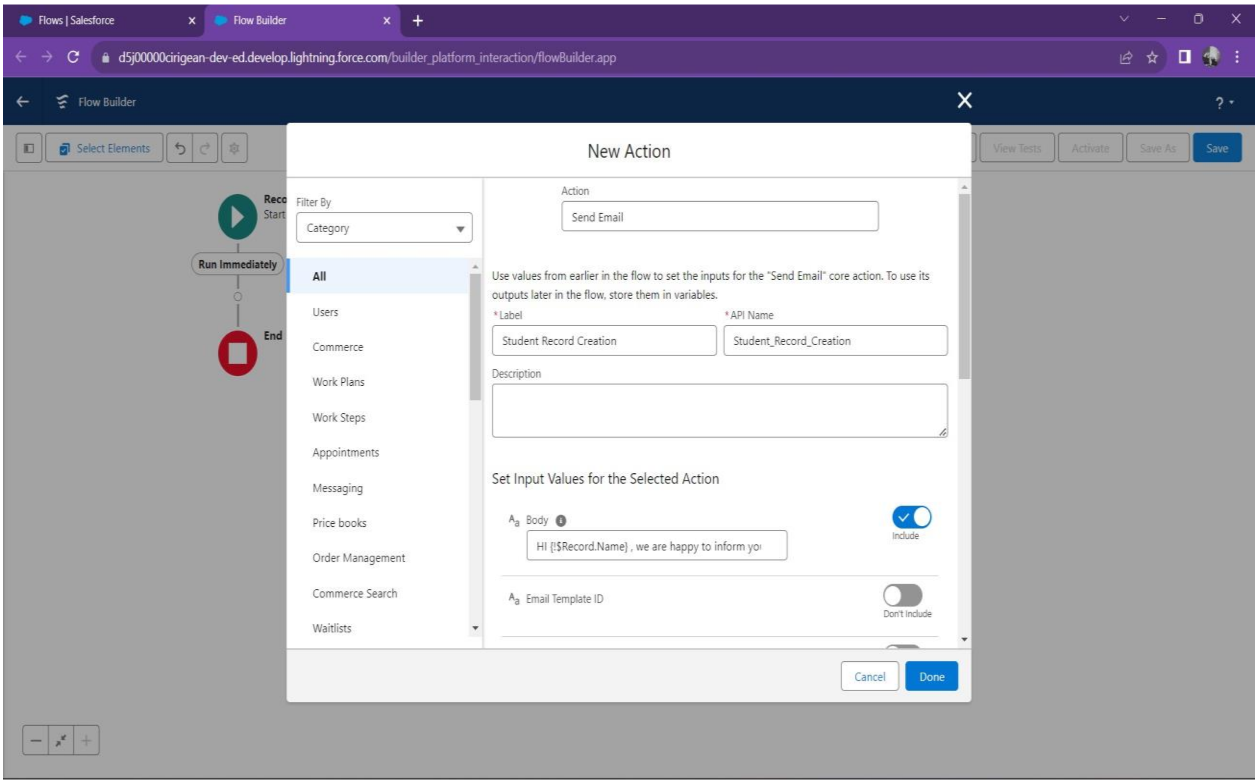

Naan Mudhalvan
Naan Mudhalvan
Consultant Dashb
- Student
Flows | Salesforce
Flow Builder
knowledgeinstituteoftech-ce-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app
Flow Builder
New Flow
Core
All + Templates
Screen Flow
Guides users through a business process that's launched from Lightning pages, Experience Cloud sites, quick actions, and ...
Record-Triggered Flow
Launches when a record is created, updated, or deleted. This autolaunched flow runs in the background.
Schedule-Triggered Flow
Launches at a specified time and frequency for each record in a batch. This autolaunched flow runs in the background.
Platform Event—Triggered Flow
Launches when a platform event message is received. This autolaunched flow runs in the background.
Autolaunched Flow (No Trigger)
Launches when invoked by Apex, processes, REST API, and more. This autolaunched flow runs in the background.
Record-Triggered Orchestration
Launches when a record is created or updated. An orchestration lets you create a multi-step, multi-user process.
Create
javascript:void(0)



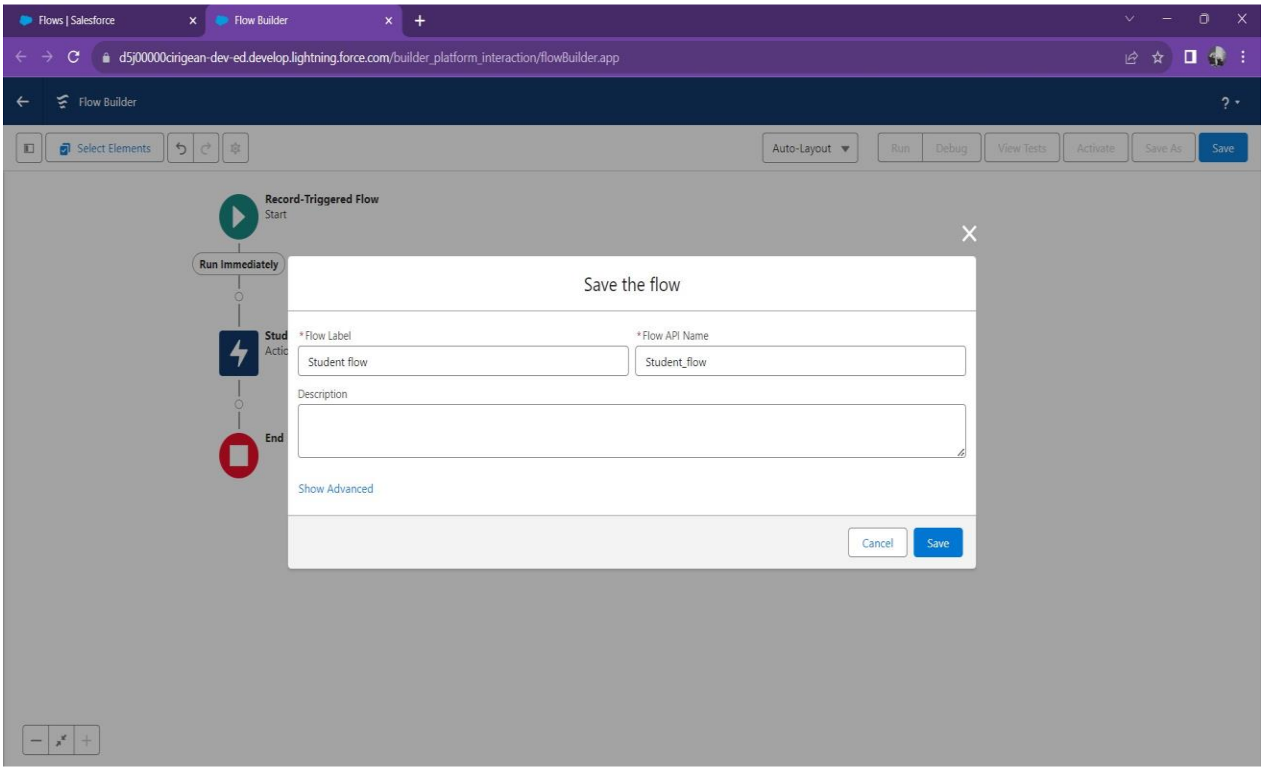
Enter the following details:

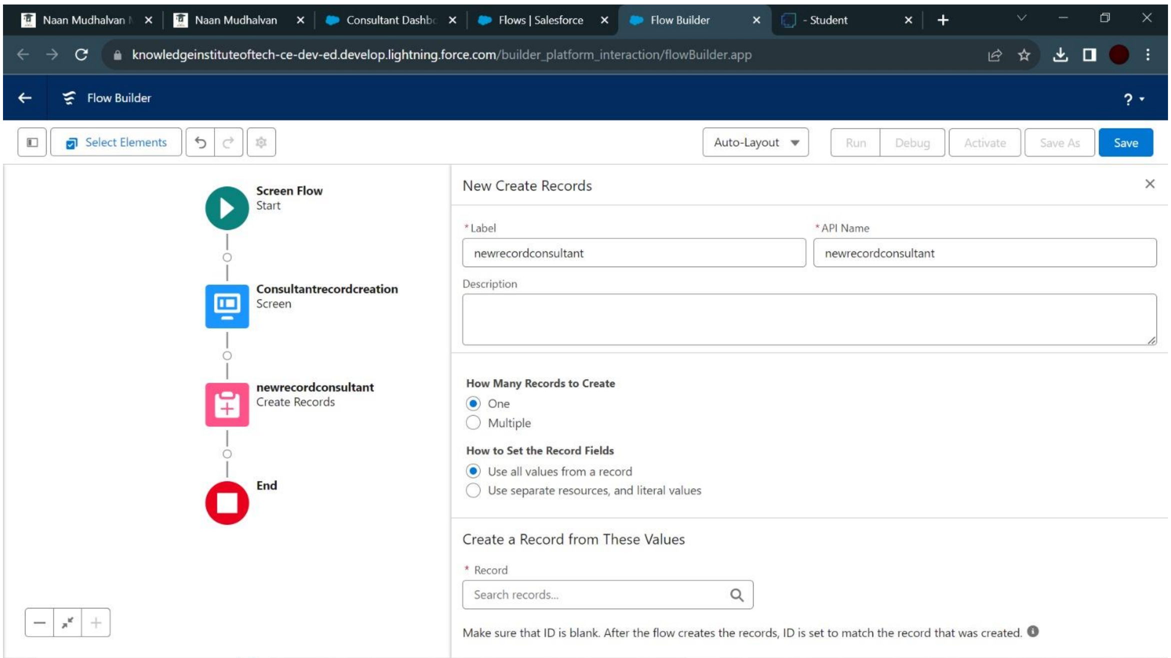
Label: Store Record Creation
Api Name: Store Record Creation (Auto-pupulated)
Body: Hi {!$Record.Name} , we are happy to inform you that you have joined in our {!$Record.school_ r.Name}.
Subject: Record Creation
Recipient email Address: {!$Record.Email__c}


Flows | Salesforce
Flow Builder
d5j00000cirigean-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app
Flow Builder
Select Elements
View Tests
Activate
Save As
Save
New Action
Filter By
Category
All
Users
Commerce
Work Plans
Work Steps
Appointments
Messaging
Price books
Order Management
Create HTTP Callout
Action
ema
Send Email
emailSimple-emailSimple
Lights, camera, action!
Select an action to configure.
Run Immediately
End
Cancel
Done

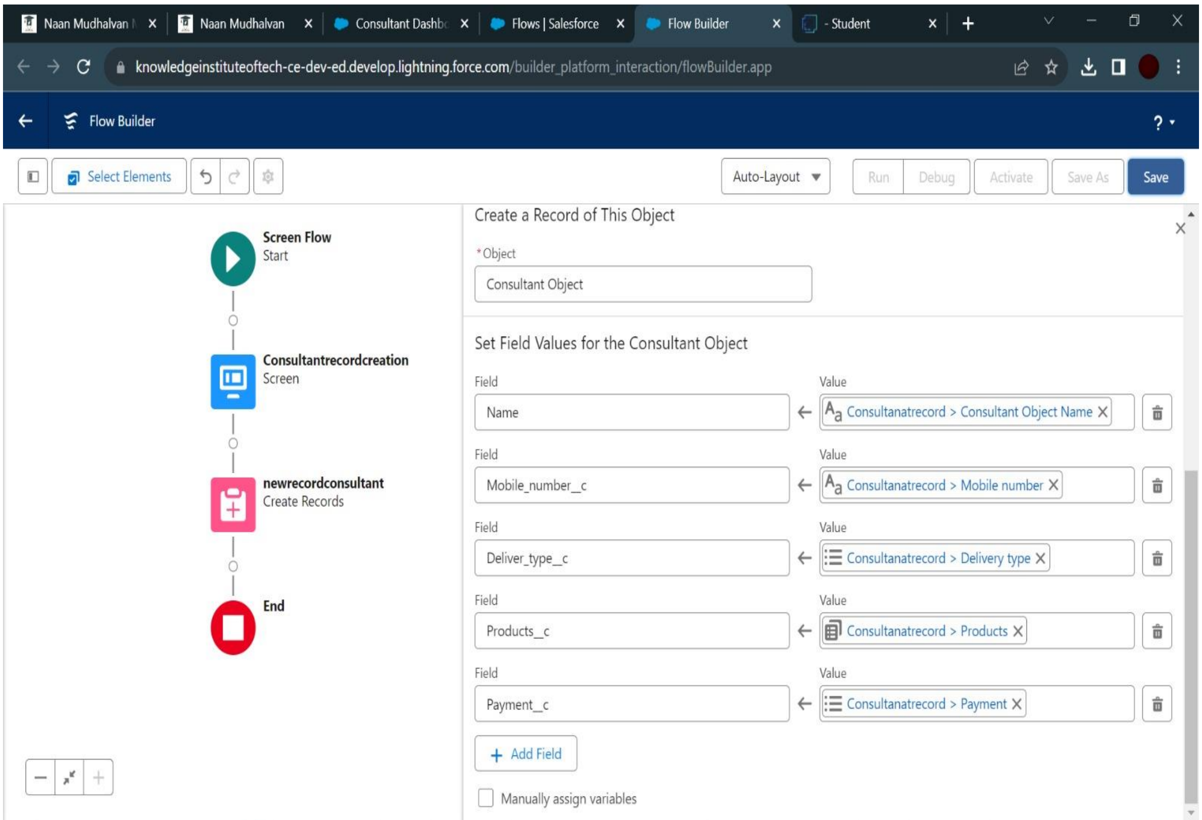

Flows | Salesforce
Flow Builder
d5j00000cirigean-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app
Flow Builder
Select Elements
View Tests
Activate
Save As
Save
New Action
Filter By
Category
All
Users
Commerce
Work Plans
Work Steps
Appointments
Messaging
Price books
Order Management
Commerce Search
Waitlists
Action
Send Email
Use values from earlier in the flow to set the inputs for the "Send Email" core action. To use its outputs later in the flow, store them in variables.
*Label
Student Record Creation
*API Name
Student_Record_Creation
Description
Set Input Values for the Selected Action
Body
HI {!$Record.Name} , we are happy to inform yo
Include
Email Template ID
Don't Include
Run Immediately
End
Cancel
Done

Click on done and Click on save
Flow label: Store flow
Flow API Name: Store flow and then click Activate.





Flow Builder
Select Elements
Auto-Layout
Run
Debug
Activate
Save As
Save
Screen Flow
Start
Consultantrecordcreation
Screen
newrecordconsultant
Create Records
End
New Create Records
*Label
newrecordconsultant
*API Name
newrecordconsultant
Description
How Many Records to Create
One
Multiple
How to Set the Record Fields
Use all values from a record
Use separate resources, and literal values
Create a Record from These Values
* Record
Search records...
Make sure that ID is blank. After the flow creates the records, ID is set to match the record that was created.



Flow Builder
Select Elements
Auto-Layout
Run
Debug
Activate
Save As
Save
Screen Flow
Start
Consultantrecordcreation
Screen
newrecordconsultant
Create Records
End
Create a Record of This Object
*Object
Consultant Object
Set Field Values for the Consultant Object
Field
Value
Name
Consultanatrecord > Consultant Object Name
Mobile_number__c
Consultanatrecord > Mobile number
Deliver_type__c
Consultanatrecord > Delivery type
Products__c
Consultanatrecord > Products
Payment__c
Consultanatrecord > Payment
Add Field
Manually assign variables

CHAPTER - 13
GITHUB & PROJECT VIDEO DEMO LINK

GitHub: https://github.com/NANDHINIVENKATESSAN/naanmudhalvan-salesforce-NM2023TMID02044-kiot

Video Demo Link:
https://drive.google.com/file/d/1VG_9r5fDkauhycGroUhvonkCeWHFt-Yl/view?usp=drivesdk