

Cosmetics Store Management using Salesforce



NAAN MUDHALVAN

PROJECT REPORT

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BONAFIDE CERTIFICATE

Certified that this project report “**Cosmetics Store Management**” is the bonafide work of “**MANOJ. G (au6201201040059), VISHWA. A (au620120104111), GOWTHAM. T (au620120104501), MOHAMMED ASHIK. M (au620120104060), SHARMA. G (au620120104088)**” who carried out the project work under my supervision.

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CHAPTER-1

PROJECT SPECIFICATION

1.8 Project Goal

The primary goal of the Customer Store Management project is to create an efficient and user-friendly solution within Salesforce for cosmetics stores. This solution aims to address several key objectives:

- Operational Efficiency: Streamline and optimize day-to-day operations, including customer record management, order processing, and inventory tracking, to improve overall efficiency.
- Customer Engagement: Enhance customer engagement by providing personalized services, tracking customer preferences, and offering targeted promotions.
- Growth: Facilitate growth by providing the tools and insights necessary for informed decision-making, leading to increased sales and profitability.
- Data Management: Implement a robust data management system to centralize and organize customer information, transaction records, and product inventory.
- Automation: Introduce automation through triggers, flows, and approval processes to reduce manual tasks and improve accuracy in coupon generation and record keeping.
- Reporting and Analysis: Develop an effective reporting and dashboard system to provide valuable insights, aiding in strategic planning and performance evaluation.

This project aims to empower cosmetics stores to efficiently manage their operations, foster stronger customer relationships, and drive growth in a competitive market.

1.9 Project Scope

The scope of the Customer Store Management project is comprehensive and covers various aspects of cosmetics store management. This project encompasses the following key components:

1. Custom Object Creation: The creation of custom objects, including "Our Customers," "Consultants," "Retailers," and "Others," to manage customer data, order details, and employee information.
2. User Profiles and Roles: Setting up user profiles and roles to control access and permissions for different user groups, including "Store Head" and "Billing Operator."
3. Automation: Implementing automation through triggers, flows, and approval processes to automate processes like coupon generation based on employee types, data validation, and record updates.
4. Reports and Dashboards: Developing various report types, including tabular, summary, and matrix reports, to provide insights into customer data, product sales, and financial performance. Creating dashboards for data visualization.
5. Data Modeling: Designing the data model with relationships between objects to enable efficient data management, allowing the creation of customer records, order details, and coupon management.
6. Security and Access Control: Ensuring data security and access control through user profiles, roles, and sharing rules to safeguard sensitive information.

The project's scope is designed to provide a holistic solution to cosmetics stores, streamlining their operations, enhancing customer engagement, and fostering growth. This project aims to create a robust, user-friendly system that improves efficiency and effectiveness in cosmetics store management.

1.10 Problem Statement Definition

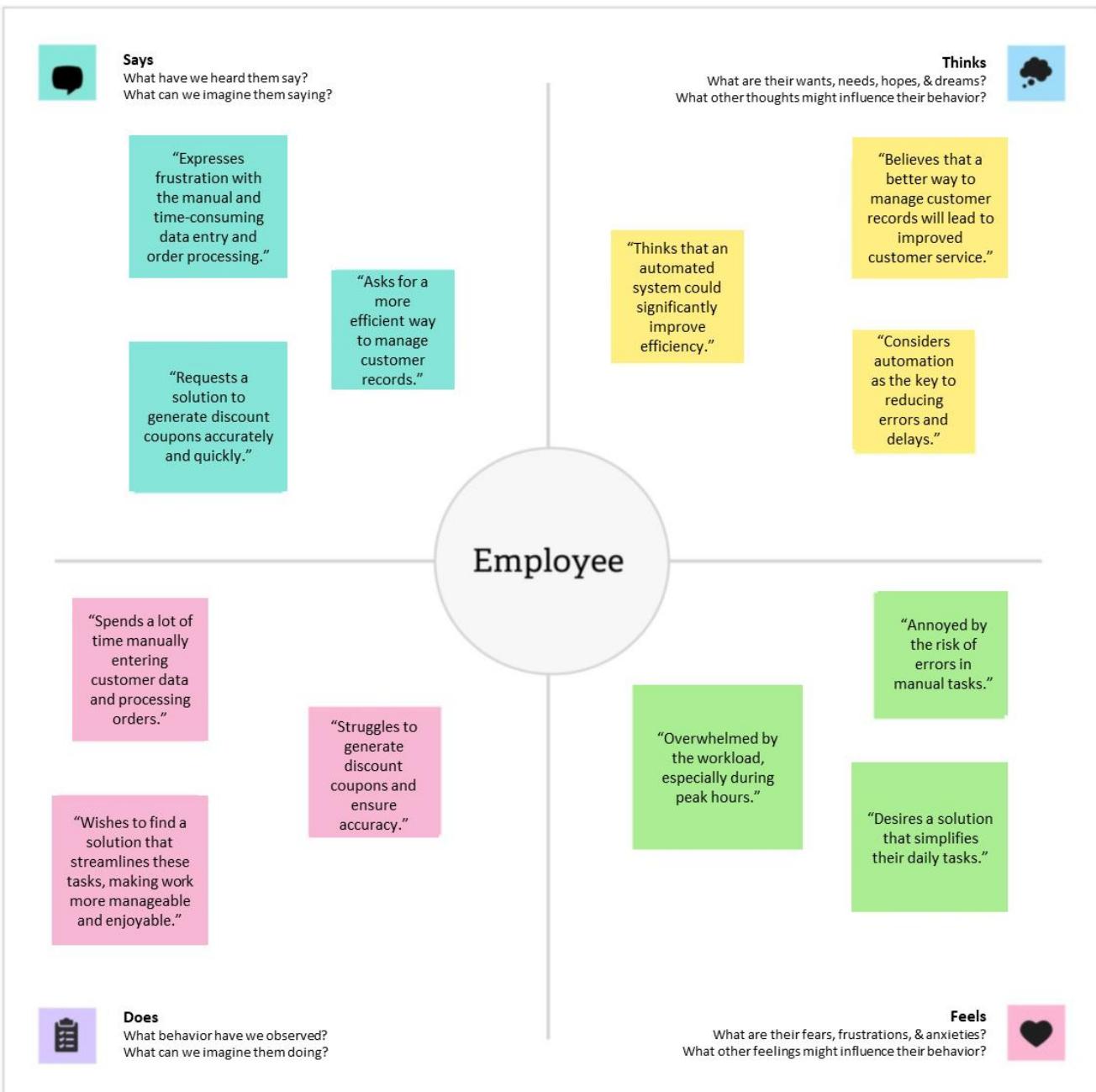
Problem for	Trying to	But	Which makes
Employee	I'm working in a cosmetics store, and I'm trying to efficiently manage customer records, process orders, and generate discount coupons for various types of employees.	But the manual and time-consuming nature of these tasks, along with the risk of errors.	This makes me feel overwhelmed and hinders our ability to provide a seamless customer experience.

1.11 Empathy Map Canvas

An empathy map is a simple, easy-to-digest visual that captures knowledge about a user's behavior and attitudes.

It is a useful tool to help teams better understand their users. Creating an effective solution requires understanding the true problem and the person who is experiencing it.

The exercise of creating the map helps participants consider things from the user's perspective along with his or her goals and challenges.



1.12 Proposed Solution

S. No	Parameter	Description
1.	Problem Statement	The problem to be solved is the manual and time-consuming management of customer records, order processing, and discount coupon generation, leading to inefficiencies and the risk of errors.
2.	Idea / Solution Description	The proposed solution is to create a Salesforce-based Customer Store Management system. This system will include custom objects for managing customer records, consultants, retailers, and other employees. Automation tools like triggers and flows will streamline data entry, order processing, and coupon generation. The solution will also provide comprehensive reports and dashboards for insights and decision-making.
3.	Novelty / Uniqueness	The uniqueness of this solution lies in its customized implementation using Salesforce. The automation of routine tasks, such as coupon generation based on employee roles, is novel and addresses the specific needs of cosmetics stores.
4.	Social Impact / Customer Satisfaction	The solution is expected to significantly improve customer satisfaction by reducing processing times, minimizing errors, and enhancing the overall shopping experience. It will also lead to improved data management, enabling better customer engagement and personalized services. This project contributes to the efficient management of cosmetics stores, potentially impacting the business's social and financial aspects positively.

1.13 Functional & Technical Requirements

1.13.1 Functional Requirements

Requirement	Description
Custom Object Creation	Create custom objects for "Our Customers," "Consultants," "Retailers," and "Others" to manage customer data, order details, and employee information.
User Profiles and Roles	Set up user profiles and roles to control access and permissions for different user groups, including "Store Head" and "Billing Operator."
Automation	Implement automation using triggers, flows, and approval processes to automate coupon generation, data validation, and record updates.
Reports and Dashboards	Develop various report types, including tabular, summary, and matrix reports, to provide insights into customer data, product sales, and financial performance. Create dashboards for data visualization.
Data Modeling	Design the data model with relationships between objects to enable efficient data management, allowing the creation of customer records, order details, and coupon management.

1.13.2 Technical Requirements

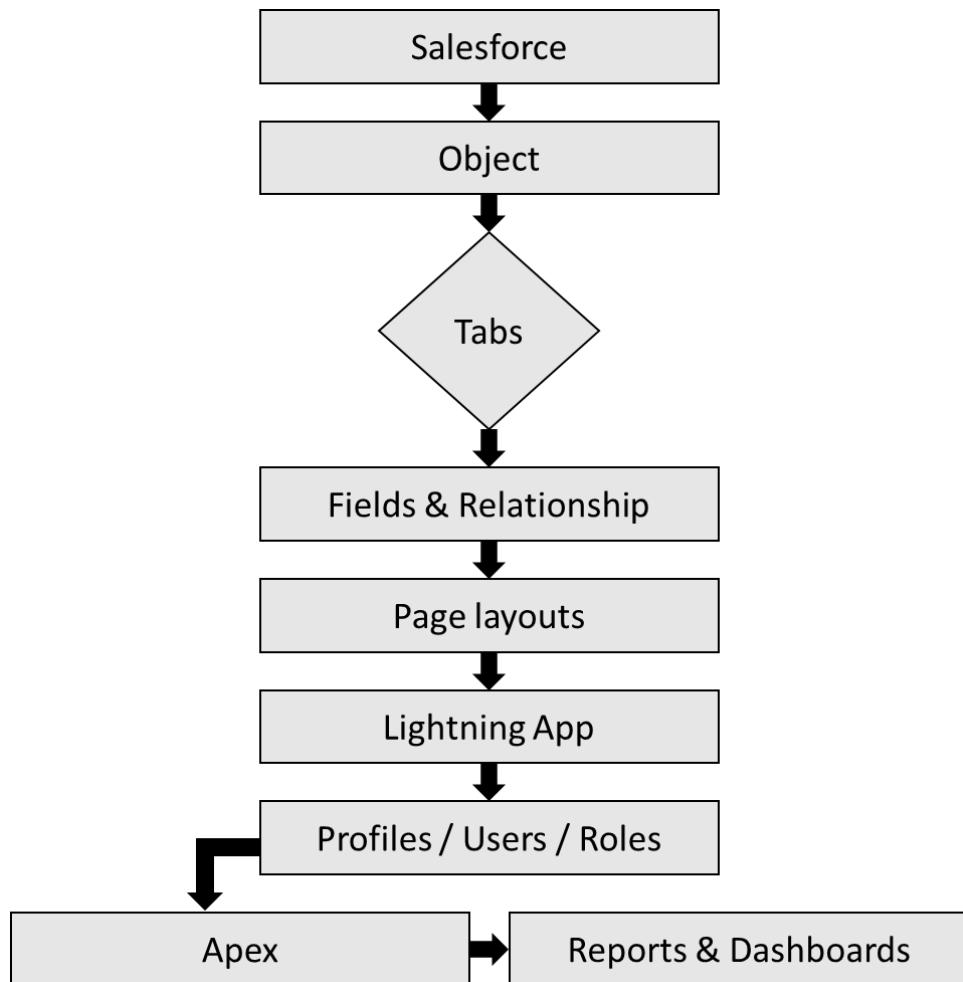
Requirement	Description
Salesforce Developer Org	Create a Salesforce developer org for project development and testing.
Lightning App	Create a Lightning app to brand the application and provide a customized color scheme and logo.
Automation Tools	Use Apex triggers and flows to implement automation in the system.
Security and Access Control	Configure security settings using user profiles, roles, and sharing rules to control access to sensitive data.

User Training	Provide user training and documentation for effective adoption of the Salesforce system within the cosmetics store.
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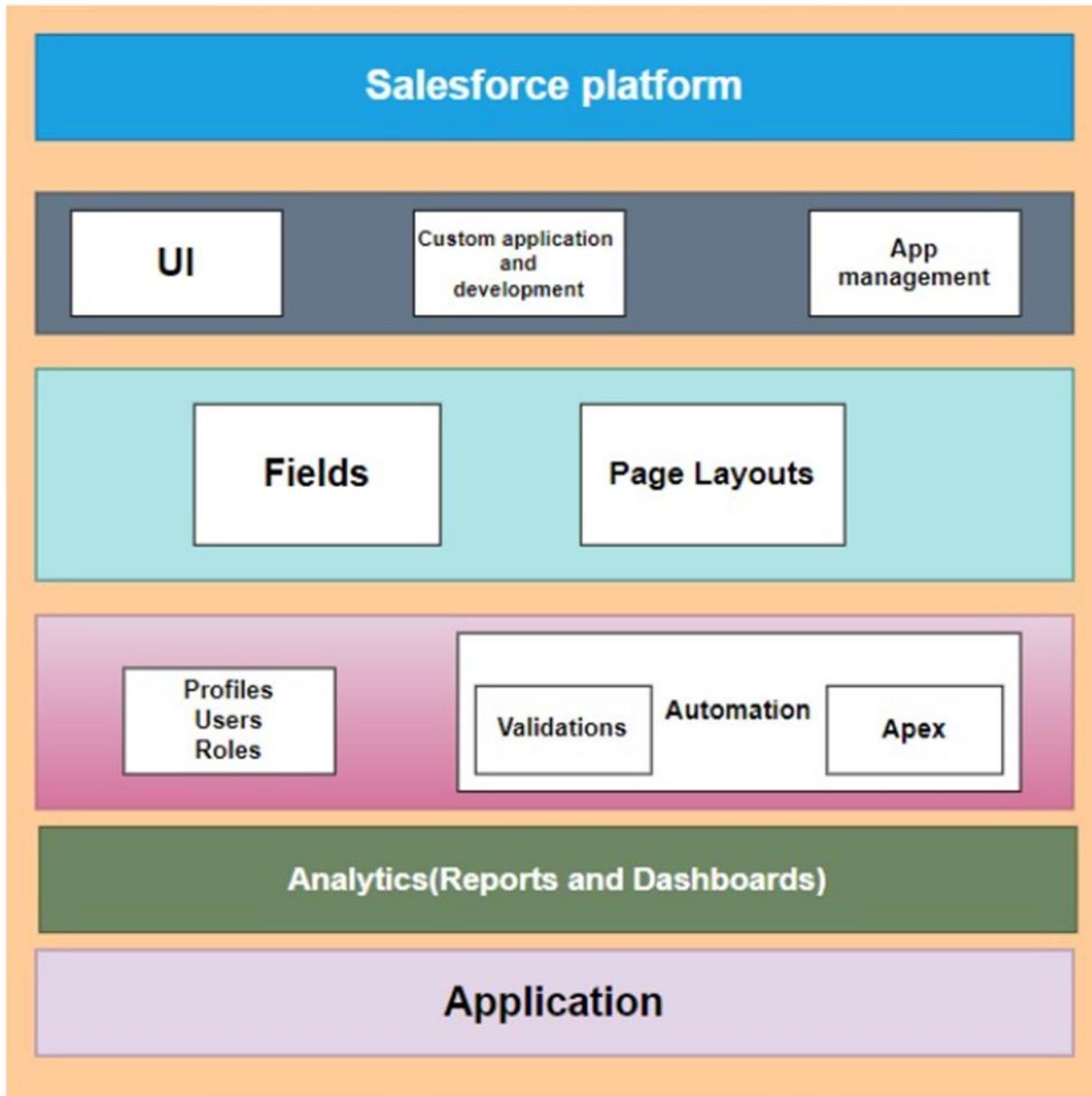
1.7 Project Road Map

1.7.1 Data Flow Diagram

A Data Flow Diagram (DFD) is a traditional visual representation of the information flows within a system. A neat and clear DFD can depict the right amount of the system requirement graphically. It shows how data enters and leaves the system, what changes the information, and where data is stored.



1.7.2 Technical Architecture

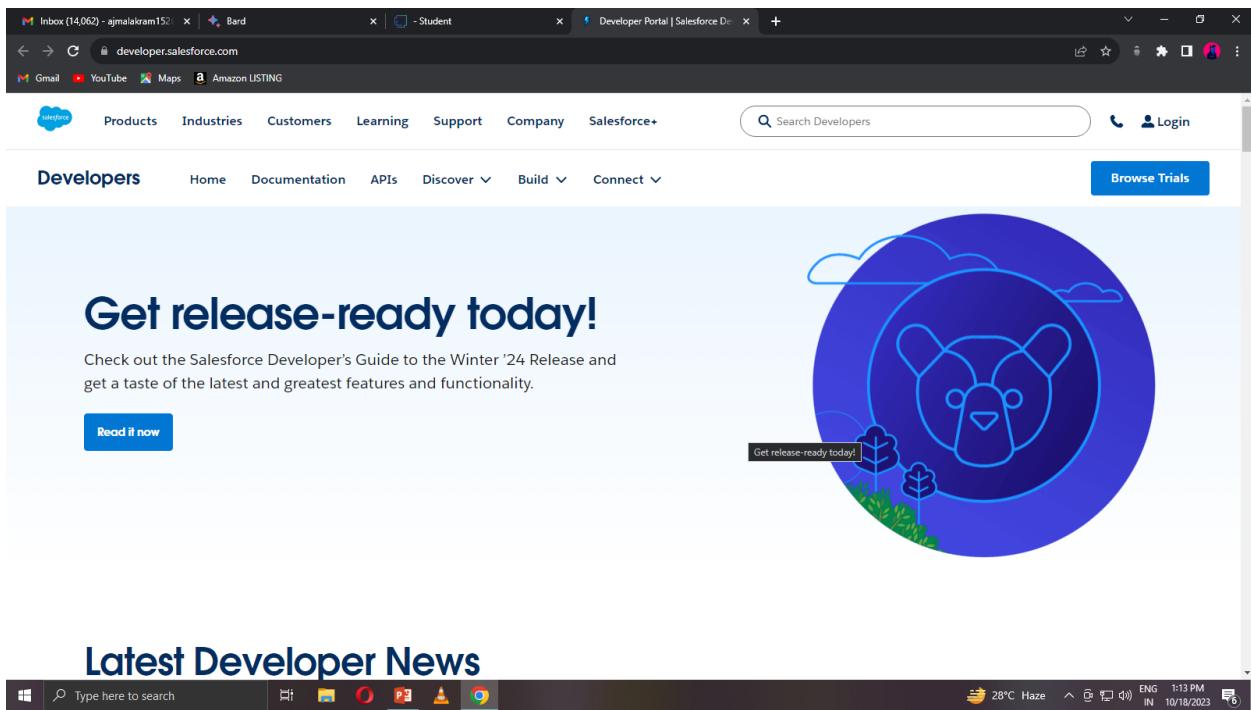


CHAPTER-2

PREPARATION DATA MODELING

2.1 Salesforce Developer Org

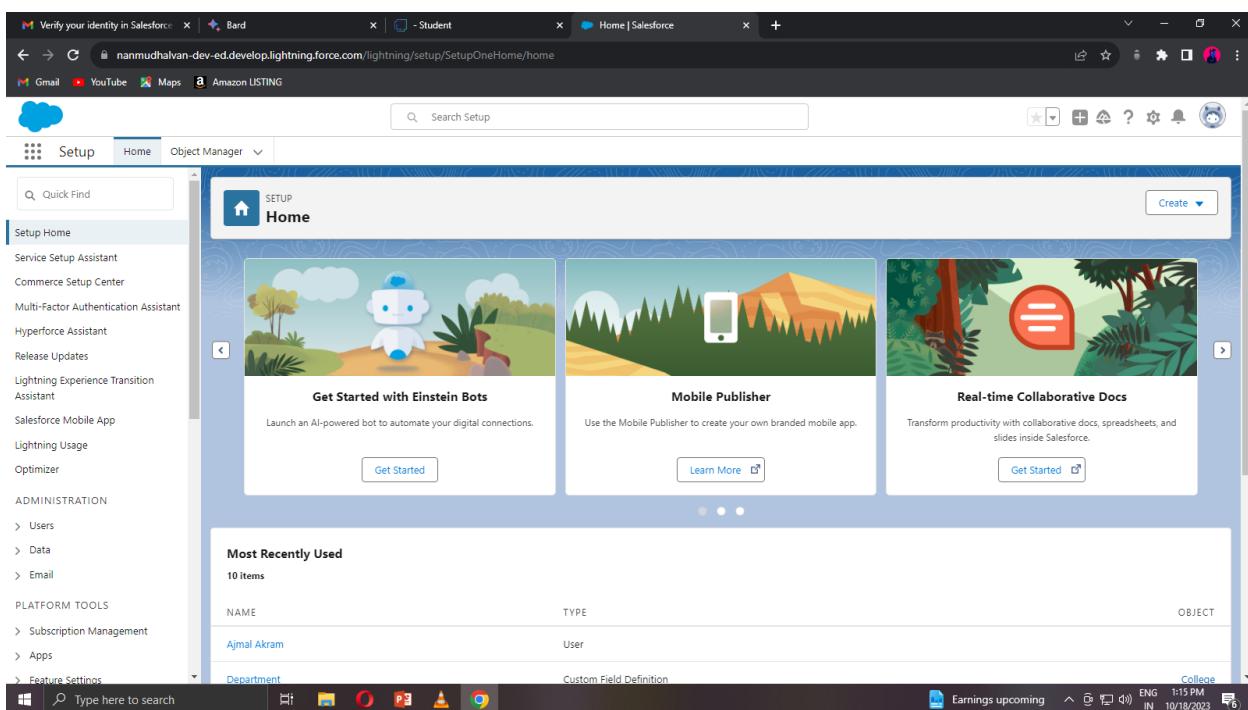
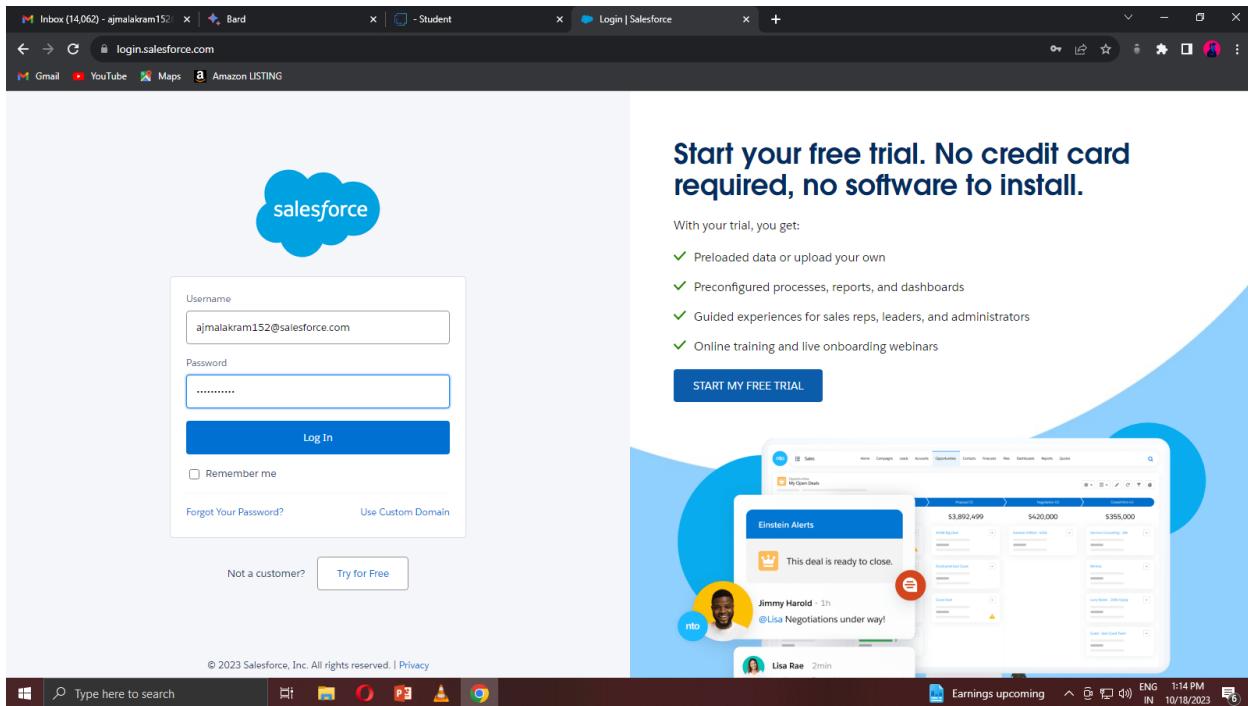
In Salesforce, a Developer Sign Up or Developer Edition is a special type of Salesforce environment that is primarily used for development, testing, and



learning purposes.

Account Activation

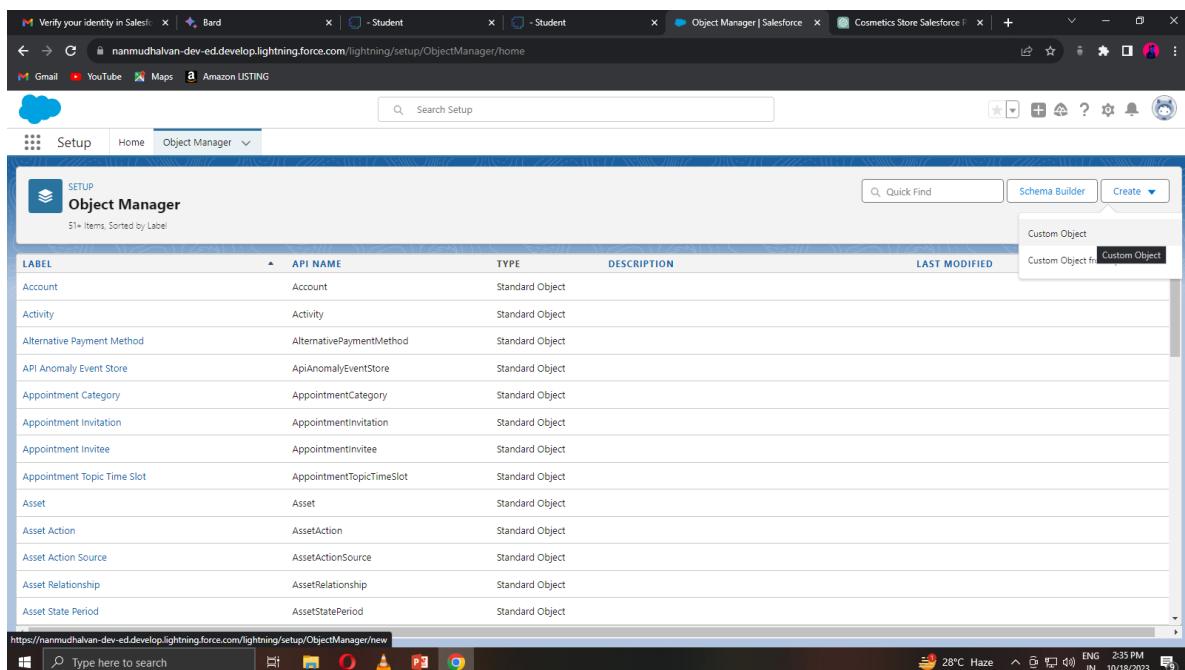
Activation tracks information about devices from which users have verified their identity.



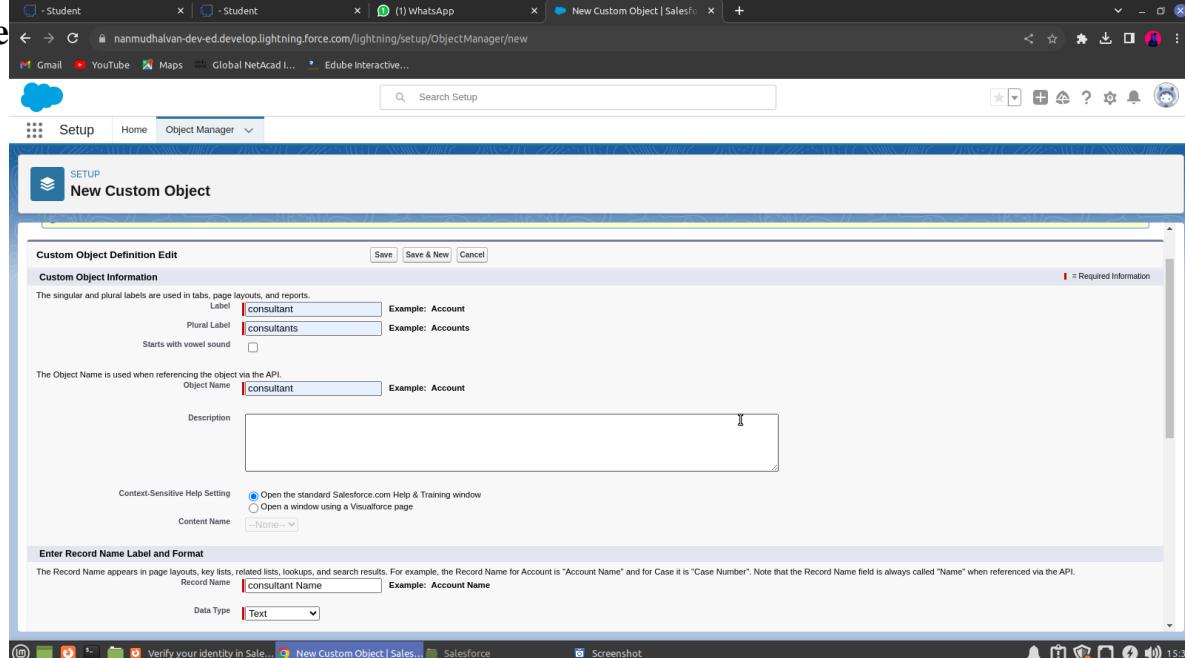
2.2 Object Creation

Salesforce objects are database tables that permit you to store data that is specific to an organization. Salesforce objects are of two types: Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc. Custom objects: Our_Customers, Consultants, Retailers, Others.

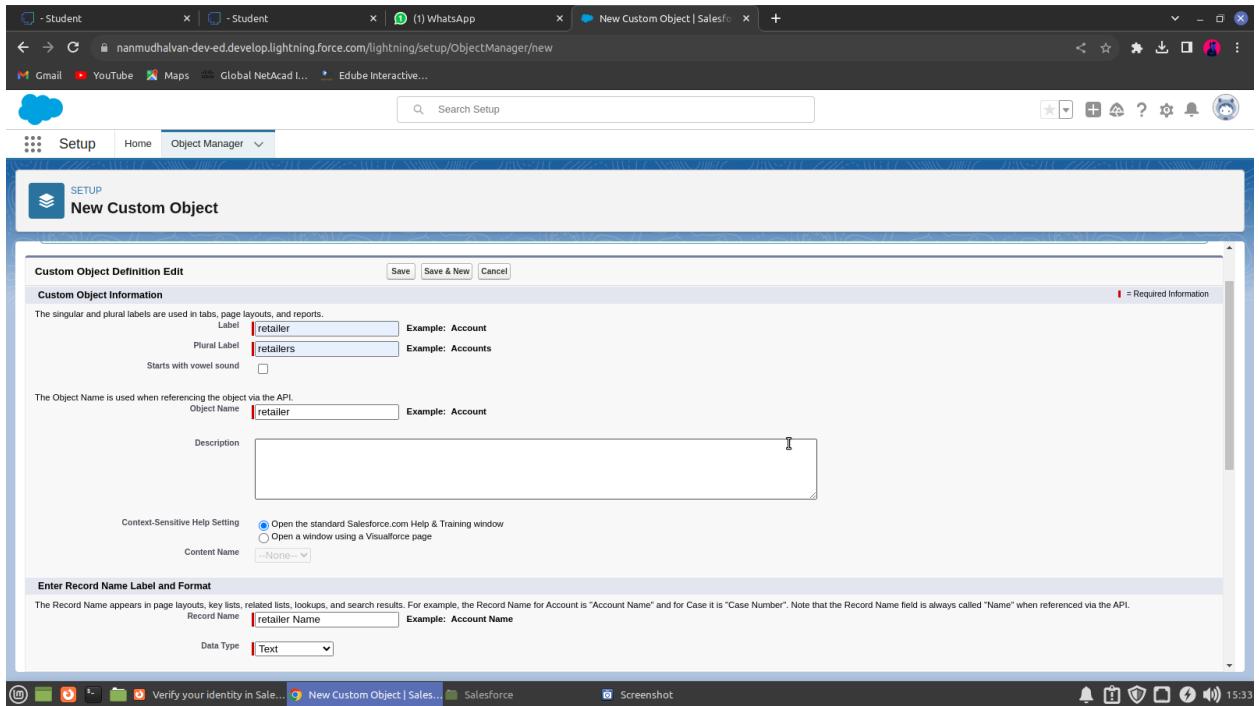
Create the Consultants Object



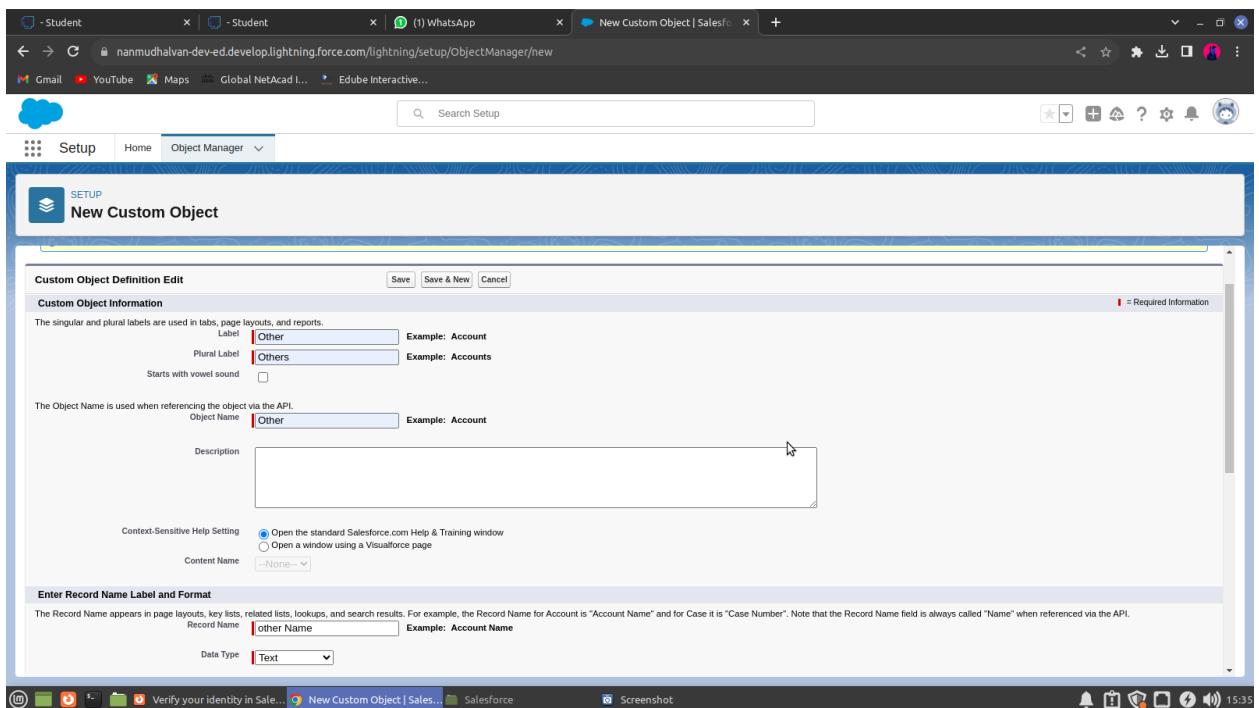
The screenshot shows the Salesforce Object Manager interface. At the top, there's a navigation bar with tabs for Setup, Home, and Object Manager. The main area is titled "Object Manager" and displays a list of 51+ items, sorted by Label. The columns in the list are labeled: LABEL, API NAME, TYPE, DESCRIPTION, and LAST MODIFIED. The "TYPE" column shows that most objects are "Standard Object". A "Create" button is visible at the top right of the list area. The URL in the browser is <https://nanmudhalvan-dev-ed.lightning.force.com/lightning/setup/ObjectManager/home>.



The screenshot shows the "New Custom Object" page in the Salesforce Setup. The title bar says "New Custom Object | Sales...". The main form is titled "Custom Object Definition Edit". It has several sections: "Custom Object Information" (Label: consultant, Plural Label: consultants), "Object Name" (Object Name: consultant), "Description" (a large text input field), "Context-Sensitive Help Setting" (radio buttons for opening the standard help window or a Visualforce page), and "Content Name" (dropdown menu). Below these is a section for "Enter Record Name Label and Format" with fields for Record Name (consultant Name) and Data Type (Text). The URL in the browser is <https://nanmudhalvan-dev-ed.lightning.force.com/lightning/setup/ObjectManager/new>.



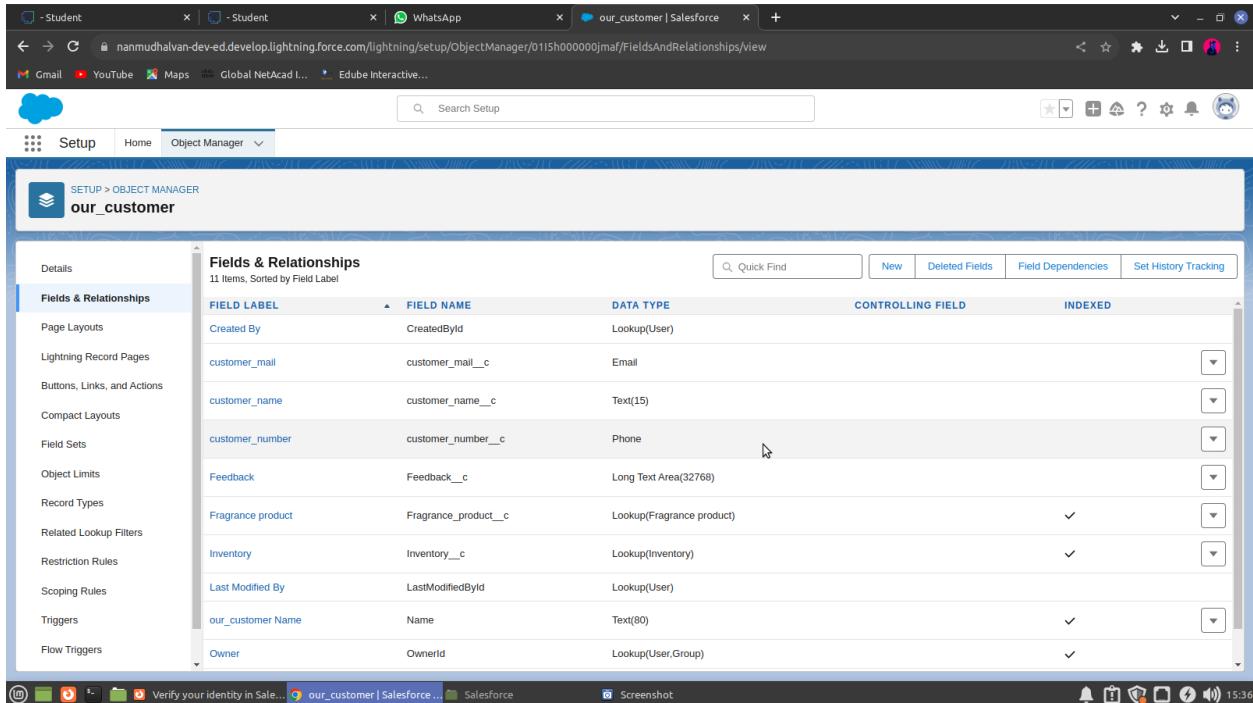
Create the Others Object



2.3 Fields and Relationship

An object relationship in Salesforce is a two-way association between two objects. Relationships are created by creating custom relationship fields on an object. This is done so that when users view records, they can also see and access related data.

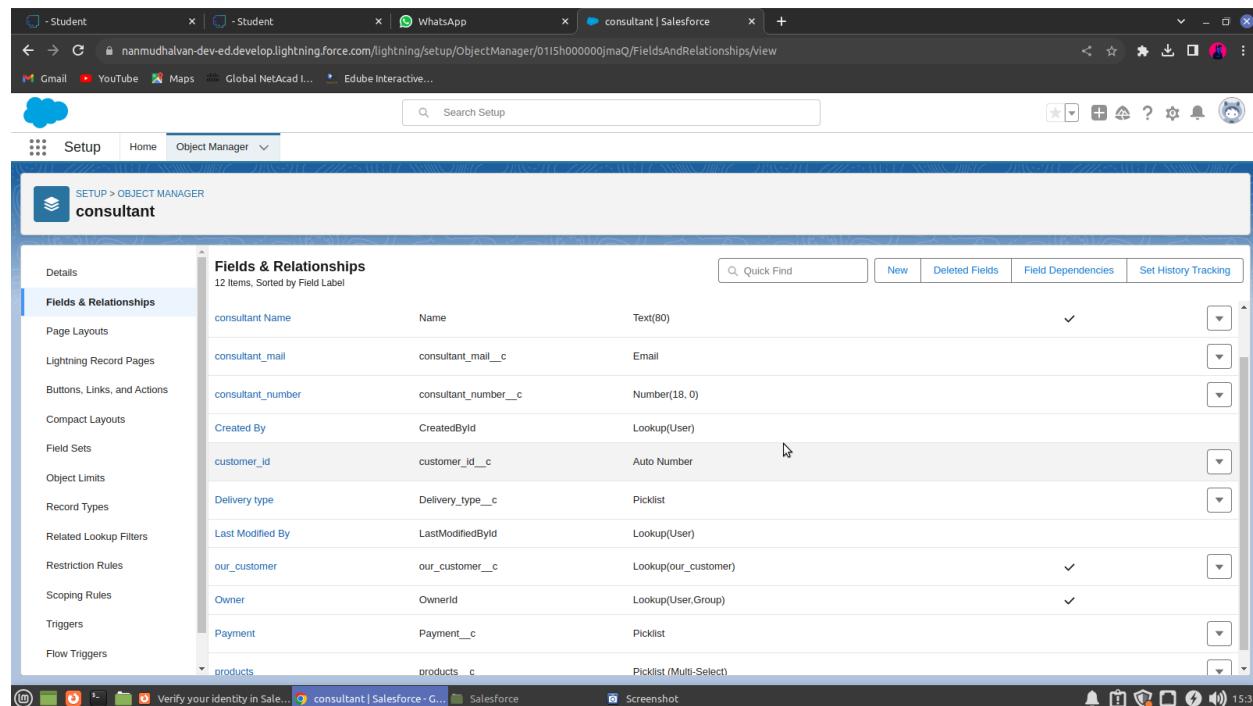
Fields in Our_Customers Objects



The screenshot shows the Salesforce Object Manager interface for the 'our_customer' object. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Field Sets. The main area displays a table titled 'Fields & Relationships' with 11 items. The columns include FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. Key fields shown include 'Created By' (CreatedBy), 'customer_mail' (customer_mail__c), 'customer_name' (customer_name__c), 'customer_number' (customer_number__c), 'Feedback' (Feedback__c), 'Fragrance product' (Fragrance_product__c), 'Inventory' (Inventory__c), 'Last Modified By' (LastModifiedBy), 'our_customer Name' (Name), 'Owner' (OwnerId), and several lookup fields.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
customer_mail	customer_mail__c	Email		
customer_name	customer_name__c	Text(15)		
customer_number	customer_number__c	Phone		
Feedback	Feedback__c	Long Text Area(32768)		
Fragrance product	Fragrance_product__c	Lookup(Fragrance product)	✓	
Inventory	Inventory__c	Lookup(Inventory)	✓	
Last Modified By	LastModifiedBy	Lookup(User)		
our_customer Name	Name	Text(80)	✓	
Owner	OwnerId	Lookup(User,Group)	✓	

Fields in Consultants Objects



The screenshot shows the Salesforce Object Manager interface for the 'consultant' object. The left sidebar lists various setup options. The main area displays a table titled 'Fields & Relationships' with 12 items. The columns include FIELD LABEL, FIELD NAME, DATA TYPE, and INDEXED. Key fields shown include 'consultant Name' (Name), 'consultant_mail' (consultant_mail__c), 'consultant_number' (consultant_number__c), 'Created By' (CreatedBy), 'customer_id' (customer_id__c), 'Delivery type' (Delivery_type__c), 'Last Modified By' (LastModifiedBy), 'our_customer' (our_customer__c), 'Owner' (OwnerId), 'Payment' (Payment__c), and 'products' (products__c).

FIELD LABEL	FIELD NAME	DATA TYPE	INDEXED
consultant Name	Name	Text(80)	✓
consultant_mail	consultant_mail__c	Email	
consultant_number	consultant_number__c	Number(18, 0)	
Created By	CreatedBy	Lookup(User)	
customer_id	customer_id__c	Auto Number	
Delivery type	Delivery_type__c	Picklist	
Last Modified By	LastModifiedBy	Lookup(User)	
our_customer	our_customer__c	Lookup(our_customer)	✓
Owner	OwnerId	Lookup(User,Group)	✓
Payment	Payment__c	Picklist	
products	products__c	Picklist (Multi-Select)	

Fields in Retailers Objects

The screenshot shows the Salesforce Object Manager interface for the 'retailer' object. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Field Sets. The main area displays a table of fields under the heading 'Fields & Relationships'. The table includes columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status. Key fields shown include 'Created By', 'Delivery type', 'Last Modified By', 'our_customer', 'Payment', 'products', 'retailer Name', 'retailer_id', 'retailer_mail', and 'retailer_number'.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Delivery type	Delivery_type__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
our_customer	our_customer__c	Master-Detail(our_customer)		✓
Payment	Payment__c	Picklist		
products	product__c	Picklist (Multi-Select)		
retailer Name	Name	Text(80)		✓
retailer_id	retailer_id__c	Auto Number		
retailer_mail	retailer_mail__c	Email		
retailer_number	retailer_number__c	Number(18, 0)		

Fields in Others Objects

The screenshot shows the Salesforce Object Manager interface for the 'Others' object. The left sidebar lists various setup options. The main area displays a table of fields under the heading 'Fields & Relationships'. The table includes columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status. Key fields shown include 'Coupon', 'Created By', 'Employee', 'Last Modified By', 'Other Name', and 'Owner'.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Coupon	Coupon__c	Text(15)		
Created By	CreatedById	Lookup(User)		
Employee	Employee__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Other Name	Name	Text(80)		✓
Owner	OwnerId	Lookup(User,Group)		✓

2.4 Page Layouts

In Salesforce, page layouts define the organization and arrangement of fields, buttons, related lists, and other components on an object's detail and edit pages. They allow you to control the user interface and tailor it to meet the specific needs of your organization.

Select the Consultant Layout page layout

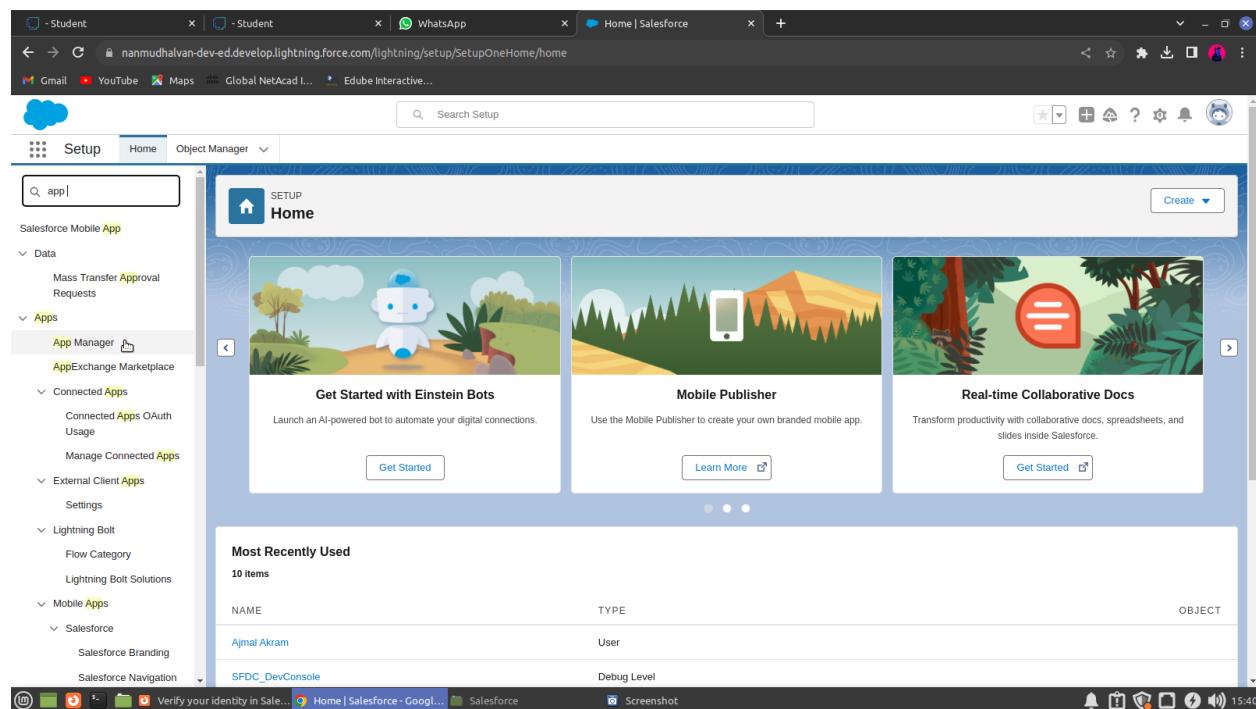
The screenshot shows the Salesforce Object Manager interface. The left sidebar is collapsed, and the main area displays the 'Page Layouts' section for the 'consultant' object. The list contains one item: 'consultant Layout'. The details for this layout are shown in the center pane: created by Ajmal Akram on 17/10/2023, 10:37 am, and modified by Ajmal Akram on 17/10/2023, 11:39 am. The top right of the list has 'Quick Find', 'New', and 'Page Layout Assignment' buttons. The bottom right corner of the main area shows a 'Screenshot' button.

The screenshot shows the Salesforce Object Manager interface with the 'Page Layouts' section selected for the 'consultant' object. The main area displays the 'consultant Layout' editor. At the top, there are buttons for 'Save', 'Quick Save', 'Preview As...', 'Cancel', 'Undo', 'Redo', and 'Layout Properties'. The 'Fields' section lists fields like 'consultant_number', 'Delivery type', 'consultant_name', 'Last Modified By', 'Created By', 'our customer', 'consultant_mail', 'customer_id', and 'Owner'. Below the fields is a 'Highlights Panel' with a note about customizing highlights. Under 'Quick Actions in the Salesforce Classic Publisher', it says actions are inherited from the global publisher layout. Under 'Salesforce Mobile and Lightning Experience Actions', it says actions are predefined by Salesforce. The bottom right corner of the main area shows a 'Screenshot' button.

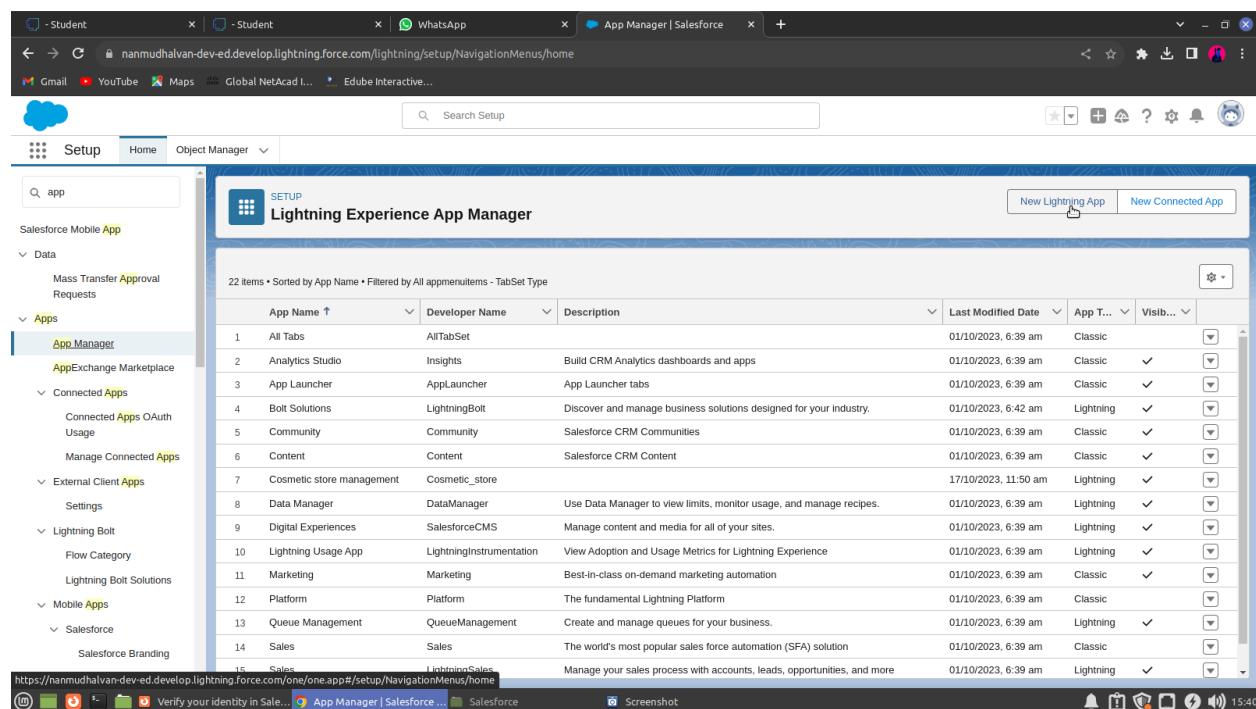
2.5 The Lightning App

An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar. Lightning apps let you brand your apps with a custom Color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app.

To create a lightning app page



The screenshot shows the Salesforce Setup Home page. The left sidebar is open, showing the 'App Manager' section under 'Apps'. The main content area displays the 'Home' app setup page. It features three cards: 'Get Started with Einstein Bots', 'Mobile Publisher', and 'Real-time Collaborative Docs'. Below these cards is a section titled 'Most Recently Used' with a table showing two items: 'Ajmal Akram' (User) and 'SFDC_DeveloperConsole' (Debug Level). The top right corner has a 'Create' button.



The screenshot shows the Lightning Experience App Manager page. The left sidebar is open, showing the 'App Manager' section under 'Apps'. The main content area displays a table of 22 items, sorted by App Name. The columns include App Name, Developer Name, Description, Last Modified Date, App Type, and Visibility. The table lists various apps like All Tabs, Analytics Studio, App Launcher, Bolt Solutions, Community, Content, Cosmetic store management, Data Manager, Digital Experiences, Lightning Usage App, Marketing, Platform, Queue Management, Sales, and Sales. The top right corner has 'New Lightning App' and 'New Connected App' buttons.

App Name ↑	Developer Name	Description	Last Modified Date	App T...	Visibl...
1 All Tabs	AllTabSet		01/10/2023, 6:39 am	Classic	✓
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	01/10/2023, 6:39 am	Classic	✓
3 App Launcher	AppLauncher	App Launcher tabs	01/10/2023, 6:39 am	Classic	✓
4 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	01/10/2023, 6:42 am	Lightning	✓
5 Community	Community	Salesforce CRM Communities	01/10/2023, 6:39 am	Classic	✓
6 Content	Content	Salesforce CRM Content	01/10/2023, 6:39 am	Classic	✓
7 Cosmetic store management	Cosmetic_store		17/10/2023, 11:50 am	Lightning	✓
8 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	01/10/2023, 6:39 am	Lightning	✓
9 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	01/10/2023, 6:39 am	Lightning	✓
10 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	01/10/2023, 6:39 am	Lightning	✓
11 Marketing	Marketing	Best-in-class on-demand marketing automation	01/10/2023, 6:39 am	Classic	✓
12 Platform	Platform	The fundamental Lightning Platform	01/10/2023, 6:39 am	Classic	✓
13 Queue Management	QueueManagement	Create and manage queues for your business.	01/10/2023, 6:39 am	Lightning	✓
14 Sales	Sales	The world's most popular sales force automation (SFA) solution	01/10/2023, 6:39 am	Classic	✓
15 Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	01/10/2023, 6:39 am	Lightning	✓

New Lightning App

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

- *App Name: Cosmetics Store Management
- *Developer Name: cosmetic store
- Description: Enter a description...

App Branding

- Image: Upload
- Primary Color Hex Value: #0070D2

Org Theme Options

- Use the app's image and color instead of the org's custom theme

App Launcher Preview

Next

Verify your identity in Sales... App Manager | Salesforce ... Screenshot 15:42

New Lightning App

App Options

Navigation and Form Factor

- *Navigation Style:
 - Standard navigation
 - Console navigation
- *Supported Form Factors:
 - Desktop and phone
 - Desktop
 - Phone

Setup and Personalization

- Setup Experience:
 - Setup (full set of Setup options)
 - Service Setup
- App Personalization Settings
 - Disable end user personalization of nav items in this app
 - Disable temporary tabs for items outside of this app

Back Next

Verify your identity in Sales... App Manager | Salesforce ... Screenshot 15:42

New Lightning App

The utility bar is a fixed footer that opens components in docked panels. Available only when the app is viewed in Lightning Experience on a desktop.

To enable the utility bar for this app, add a utility item.

Back Next

13	Queue Management	QueueManagement	Create and manage queues for your business.	01/10/2023, 6:39 am	Lightning	✓
14	Sales	Sales	The world's most popular sales force automation (SFA) solution	01/10/2023, 6:39 am	Classic	✗
15	Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	01/10/2023, 6:39 am	Lightning	✓

Verify your identity in Sales... App Manager | Salesforce Screenshot

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 Selected Items

Icon	Name	Icon	Name
Accounts	our_customers		
Alert Settings	retailers		
All Sites	Reports		
Alternative Payment Methods	Dashboards		
Analytics	Products		
App Launcher			

Back Next

13	Queue Management	QueueManagement	Create and manage queues for your business.	01/10/2023, 6:39 am	Lightning	✓
14	Sales	Sales	The world's most popular sales force automation (SFA) solution	01/10/2023, 6:39 am	Classic	✗
15	Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	01/10/2023, 6:39 am	Lightning	✓

Verify your identity in Sales... App Manager | Salesforce Screenshot

CHAPTER-3

USERS & DATA SECURITY

3.1 Profile

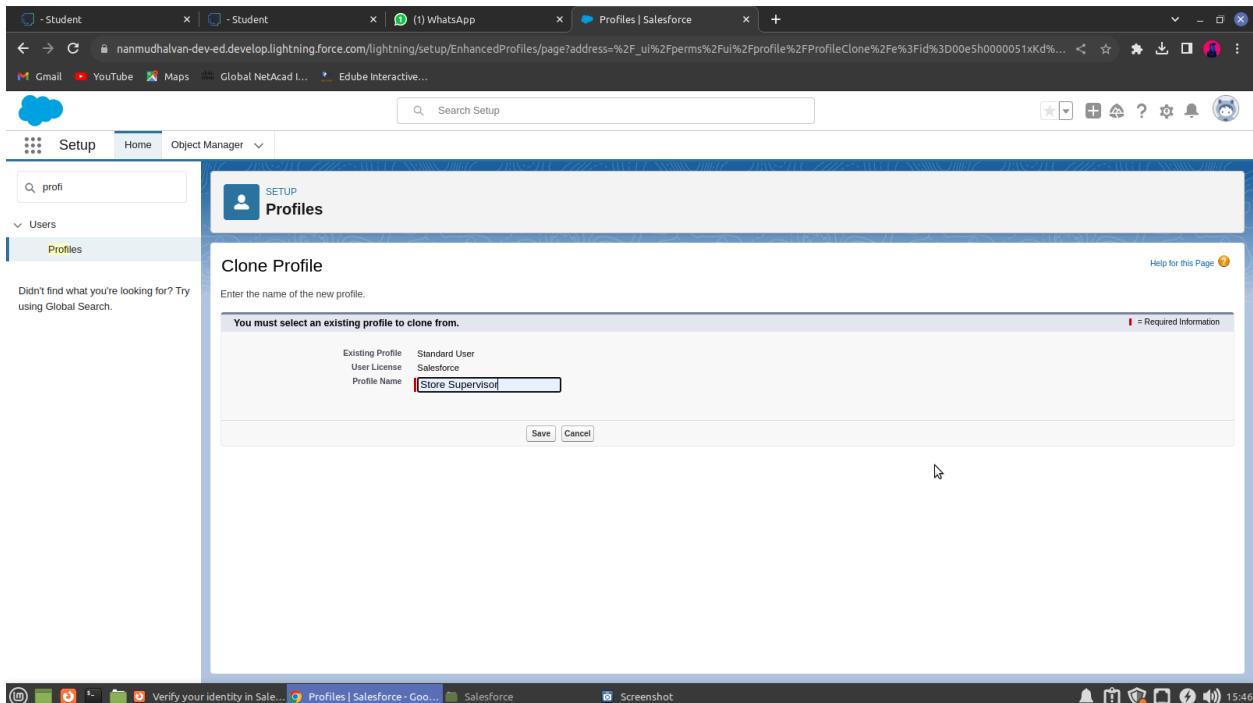
A profile is a group/collection of settings and permissions that define what a user can do in salesforce. A profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login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

Creating a Profiles

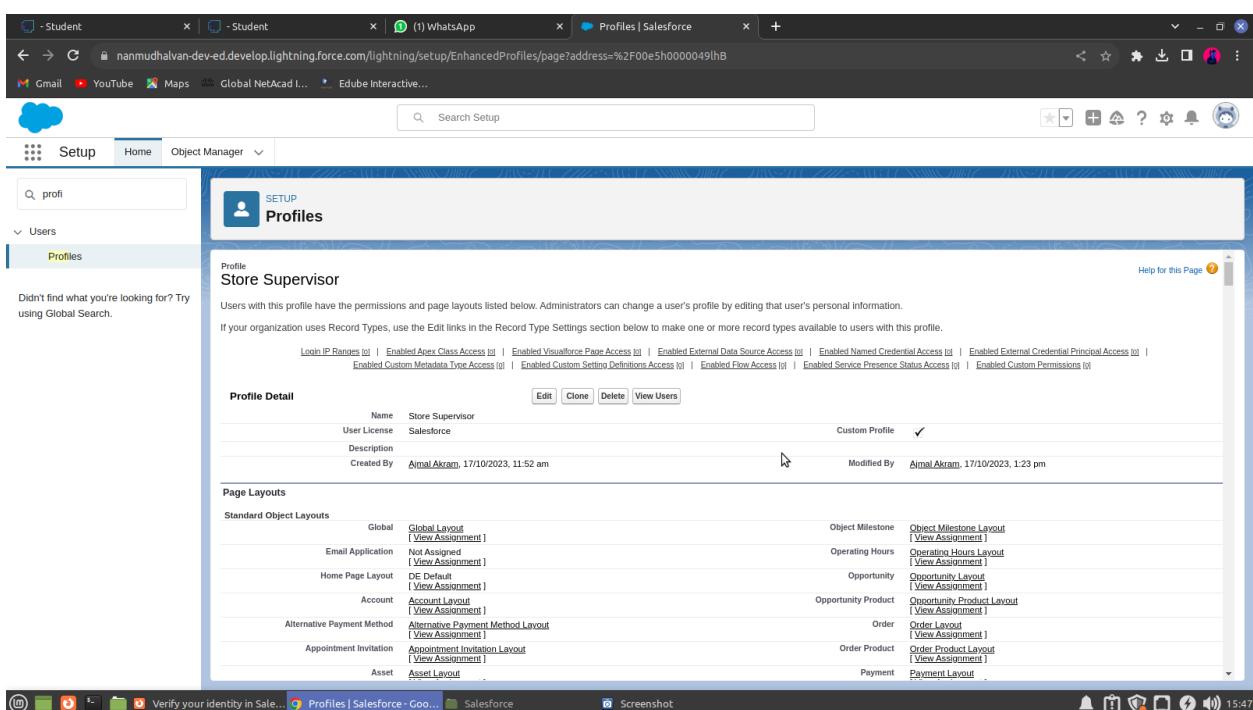
The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected under 'Users'. The search bar at the top contains 'profi'. The main area displays a list of profiles with columns for Action, Profile Name, User License, and Custom. The 'Custom' column shows checkboxes for various user licenses. A modal window titled 'Edit Profile' is open over the list, showing the 'Standard User' profile details. The modal includes tabs for 'Profile Detail' and 'Page Layouts', and lists various object layouts and their corresponding global layouts.

This screenshot shows the 'Edit Profile' modal for the 'Standard User' profile. The 'Profile Detail' tab is active, displaying the profile's name, user license (Salesforce), and creation information (created by 'salesforce.com, inc.' on 01/10/2023, 6:39 am). The 'Page Layouts' tab is also visible, listing standard object layouts like Account, Opportunity, and Case, along with their respective global layouts. The bottom of the modal shows a summary of record types and external access settings.

To create a new profile (Store Supervisor)



The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. A search bar at the top has 'profi' typed into it. On the left, a sidebar shows 'Users' and 'Profiles'. A modal window titled 'Clone Profile' is open, asking for the name of the new profile. It lists 'Existing Profile' as 'Standard User' and 'User License' as 'Salesforce'. The 'Profile Name' field contains 'Store Supervisor'. At the bottom of the modal are 'Save' and 'Cancel' buttons.



The screenshot shows the 'Store Supervisor' profile details page. The profile is named 'Store Supervisor' and is associated with the 'Salesforce' user license. The 'Profile Detail' section shows the profile was created by Aimal Akram on 17/10/2023 at 11:52 am and modified by Aimal Akram on 17/10/2023 at 1:23 pm. The 'Page Layouts' section lists various standard object layouts assigned to the profile, including Global, Email Application, Home Page Layout, Account, Alternative Payment Method, Appointment Invitation, and Asset layouts. Each layout is linked to its respective object's layout.

Student - Student - WhatsApp - Profiles | Salesforce

nanmudhalvan-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5h0000049lhB%2Fe%3FretURL%3D%252F00e5h0000049lhB%253FappLayout%...

Gmail YouTube Maps Global NetAcad... Edube Interactive...

Search Setup

Setup Home Object Manager

Profiles

Name: Store Supervisor

User License: Salesforce

Description:

Custom Profile: ✓

Custom App Settings

	Visible	Default		Visible	Default
All Tabs (standard_AllTabSet)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard_LightningSales)	<input checked="" type="checkbox"/>	<input type="radio"/>
Analytics Studio (standard_Insights)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard_Sales)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
App Launcher (standard_AppLauncher)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales Console (standard_LightningSalesConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>
Bolt Solutions (standard_LightningBolt)	<input checked="" type="checkbox"/>	<input type="radio"/>	Salesforce Chatter (standard_Chatter)	<input checked="" type="checkbox"/>	<input type="radio"/>
Community (standard_Community)	<input checked="" type="checkbox"/>	<input type="radio"/>	Salesforce Scheduler Setup (standard_LightningScheduler)	<input type="checkbox"/>	<input type="radio"/>
Content (standard_Content)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sample Console (standard_ServiceConsole)	<input type="checkbox"/>	<input type="radio"/>
Cosmetic store management (Cosmetic_store)	<input checked="" type="checkbox"/>	<input type="radio"/>	Service (standard_Service)	<input checked="" type="checkbox"/>	<input type="radio"/>
Data Manager (standard_DataManager)	<input checked="" type="checkbox"/>	<input type="radio"/>	Service Console (standard_LightningService)	<input checked="" type="checkbox"/>	<input type="radio"/>
Digital Experiences (standard_DigitalExperiences)	<input checked="" type="checkbox"/>	<input type="radio"/>	Site.com (standard_Sites)	<input checked="" type="checkbox"/>	<input type="radio"/>
Lightning Usage App (standard_LightningInstrumentation)	<input checked="" type="checkbox"/>	<input type="radio"/>	Subscription Management (standard_ReverseCloudConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>
Marketing (standard_Marketing)	<input type="checkbox"/>	<input type="radio"/>	Work (standard_Work)	<input checked="" type="checkbox"/>	<input type="radio"/>

Verify your identity in Sales... Profiles | Salesforce - Goo... Salesforce Screenshot 15:48

Student - Student - WhatsApp - Profiles | Salesforce

nanmudhalvan-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5h0000049lhB%2Fe%3FretURL%3D%252F00e5h0000049lhB%253FappLayout%...

Gmail YouTube Maps Global NetAcad... Edube Interactive...

Search Setup

Setup Home Object Manager

Profiles

Finance Transactions

Gateway Provider Payment Method Types

Ideas

Images

Incidents

Individuals

Invoices

Leads

Web Cart Documents

Work Orders

Work Plans

Work Plan Templates

Work Step Templates

Work Types

Work Type Groups

Custom Object Permissions

	Read	Create	Edit	Delete	View All	Modify All		Read	Create	Edit	Delete	View All	Modify All
consultants	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>					
Favourites	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>										
Fragrance products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
Inventories	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
Others	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					

Session Settings

	Read	Create	Edit	Delete	View All	Modify All
our_customers	<input checked="" type="checkbox"/>					
Properties	<input type="checkbox"/>					
retailers	<input checked="" type="checkbox"/>					
Skincare products	<input type="checkbox"/>					
Students	<input type="checkbox"/>					

Verify your identity in Sales... Profiles | Salesforce - Goo... Salesforce Screenshot 15:48

Profiles

Fragrance products

Inventories

Others

retailers

Skincare products

Students

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Lockout effective period: 15 minutes

Obscure secret answer for password resets

Require a minimum 1 day password lifetime

Don't immediately expire links in forgot password emails

Save Save & New Cancel

To create a new profile (Billing Operator)

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile: Standard Platform User

User License: Salesforce Platform

Profile Name: Billing operator

Save Cancel

The screenshot shows the Salesforce Setup interface with the following details:

- Page Title:** Profiles | Salesforce
- Search Bar:** Search Setup
- Left Navigation:** Setup, Home, Object Manager, Profiles (selected)
- Profile Name:** Billing operator
- Description:** Didn't find what you're looking for? Try using Global Search.
- Profile Detail:** Name: Billing operator, User License: Salesforce Platform, Description: (empty), Created By: Aimal Akram, 17/10/2023, 11:57 am, Modified By: Aimal Akram, 17/10/2023, 1:23 pm.
- Page Layouts:** Standard Object Layouts and Object Milestone Layouts for various objects like Global, Email Application, Home Page Layout, Account, Alternative Payment Method, Appointment Invitation, Asset, Order, Order Product, Payment, Payment Authorization, and Payment Authorization Adjustment.
- Buttons:** Edit, Done, Delete, View Users.

The screenshot shows the Salesforce Setup interface with the following details:

- Page Title:** Profiles | Salesforce
- Search Bar:** Search Setup
- Left Navigation:** Setup, Home, Object Manager, Profiles (selected)
- Profile Name:** Billing operator
- Description:** Didn't find what you're looking for? Try using Global Search.
- Profile Edit Form:** Name: Billing operator, User License: Salesforce Platform, Description: (empty).
- Custom App Settings:** Analytics Studio (standard_Insights), App Launcher (standard_AppLauncher), Cosmetic store management (Cosmetic_store).
- Service Provider Access:** Tab Settings, Overwrite users' personal tab customizations, Standard Tab Settings.
- Buttons:** Save, Save & New, Cancel.

Student - Student - WhatsApp | Profiles | Salesforce

nanmudhalvan-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5h0000049lhG%2Fe%3FretURL%3D%252F00e5h0000049lhG%253FappLayout%...

Gmail YouTube Maps Global NetAcad I... Edube Interactive...

Cloud Setup Home Object Manager Search Setup

Profile

Profiles

consultants

Favorites

Fragrance products

Inventories

Others

our_customers

Properties

retailers

Skincare products

Students

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Lockout effective period: 15 minutes

Obscure secret answer for password resets

Didn't find what you're looking for? Try using Global Search.

Verify your identity in Sale... Profiles | Salesforce - Goo... Salesforce Screenshot 15:50

Student - Student - WhatsApp | Profiles | Salesforce

nanmudhalvan-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e5h0000049lhG%2Fe%3FretURL%3D%252F00e5h0000049lhG%253FappLayout%...

Gmail YouTube Maps Global NetAcad I... Edube Interactive...

Cloud Setup Home Object Manager Search Setup

Profile

Profiles

Fragrance products

Inventories

Others

retailers

Skincare products

Students

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Lockout effective period: 15 minutes

Obscure secret answer for password resets

Require a minimum 1 day password lifetime

Don't immediately expire links in forgot password emails

Save Save & New Cancel

Verify your identity in Sale... Profiles | Salesforce - Goo... Salesforce Screenshot 15:50

3.2 Setup Roles

Salesforce roles are record-level access controls that define what data a user can see in Salesforce.

Creating a Role

The screenshot shows the Salesforce Setup interface with the 'Roles' tab selected. On the left, a sidebar lists various setup categories like Feature Settings, Sales, Service, and Case Teams. The main content area is titled 'Understanding Roles' and contains a diagram illustrating a role hierarchy:

```
graph TD; CEO[CEO President] --> CFO[CFO VP, Sales]; CFO --> WSD[Western Sales Director]; CFO --> ESD[Eastern Sales Director]; CFO --> ISD[International Sales Director]; WSD --> WSRep1[Western Sales Rep]; WSD --> WSRep2[CA Sales Rep]; WSD --> WSRep3[OR Sales Rep]; ESD --> ESRep1[Eastern Sales Rep]; ESD --> ESRep2[NY Sales Rep]; ESD --> ESRep3[MA Sales Rep]; ISD --> ISRep1[International Sales Rep]; ISD --> ISRep2[Asian Sales Rep]; ISD --> ISRep3[European Sales Rep];
```

Each role level has associated permissions: CEO and CFO can view all data, roll up forecasts, and generate reports for all users below them. The Western Sales Director, Eastern Sales Director, and International Sales Director can view & edit data, roll up forecasts, and generate reports for their users directly beneath them. Sales representatives at the bottom level can view & edit data, roll up forecasts, and generate reports for their own data but cannot access data of users above or at the same level.

The screenshot shows the 'Role Edit' page for a role named 'Store Head'. The sidebar on the left remains the same. The main content area is titled 'Role Edit' and shows the following fields:

Label	Store Head
Role Name	Store_Head
This role reports to	CEO
Role Name as displayed on reports	

At the bottom of the form are 'Save', 'Save & New', and 'Cancel' buttons.

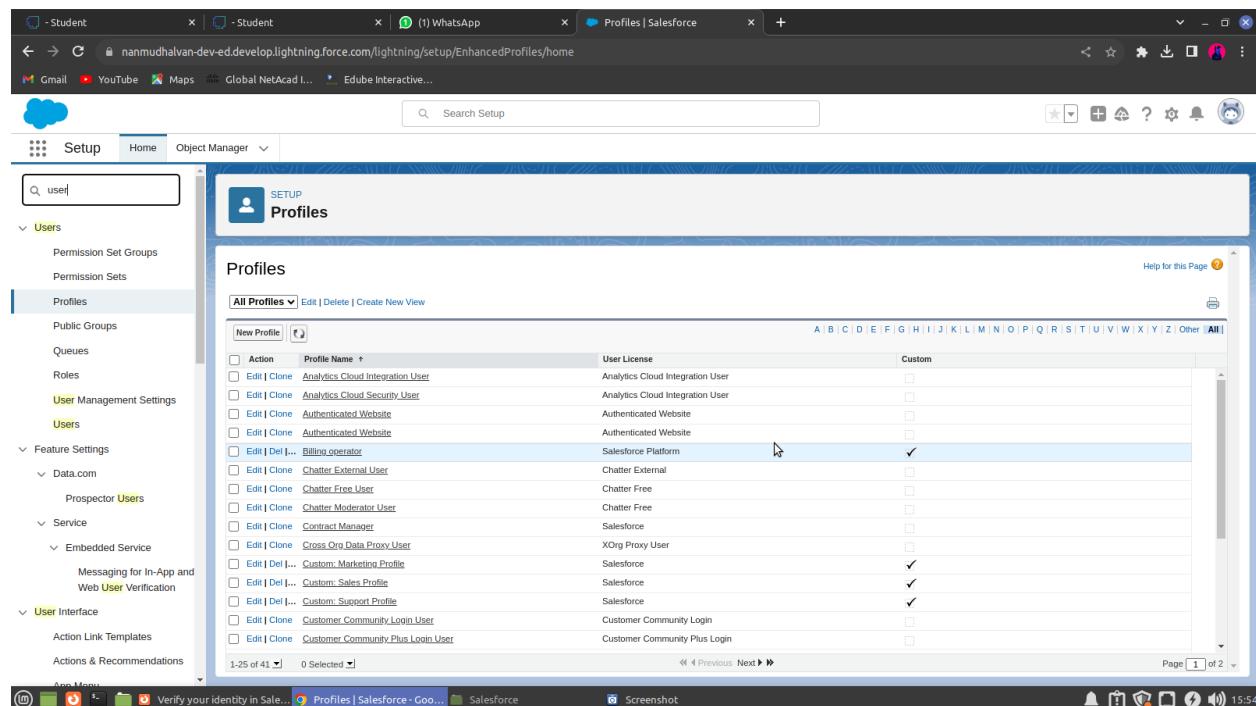
The screenshot shows the Salesforce Setup interface with the 'Roles' page selected. On the left, a sidebar lists 'Sales' and 'Service' sections under 'Feature Settings'. The main area displays the 'Role Edit' screen for the 'Billing Operator' role. The 'Label' field contains 'Billing Operator', the 'Role Name' field contains 'Billing_Operator', and the 'This role reports to' field is set to 'Store Head'. A note below states 'Role Name as displayed on reports'. At the bottom are 'Save', 'Save & New', and 'Cancel' buttons.

The screenshot shows the Salesforce Setup interface with the 'Roles' page selected. On the left, a sidebar lists 'Sales' and 'Service' sections under 'Feature Settings'. The main area displays the 'Creating the Role Hierarchy' screen. It shows a tree view of the organization's role hierarchy. The root node is 'nanmudhalvan'. Under 'nanmudhalvan', there are nodes for 'CEO', 'CFO', 'COO', 'Store Head', 'Billing Operator', 'SVP, Customer Service & Support', 'Customer Support, International', 'Customer Support, North America', 'Installation & Repair Services', and 'SVP, Human Resources'. Each node has 'Edit | Del | Assign' buttons. A 'Show in tree view' button is located at the top right of the hierarchy tree.

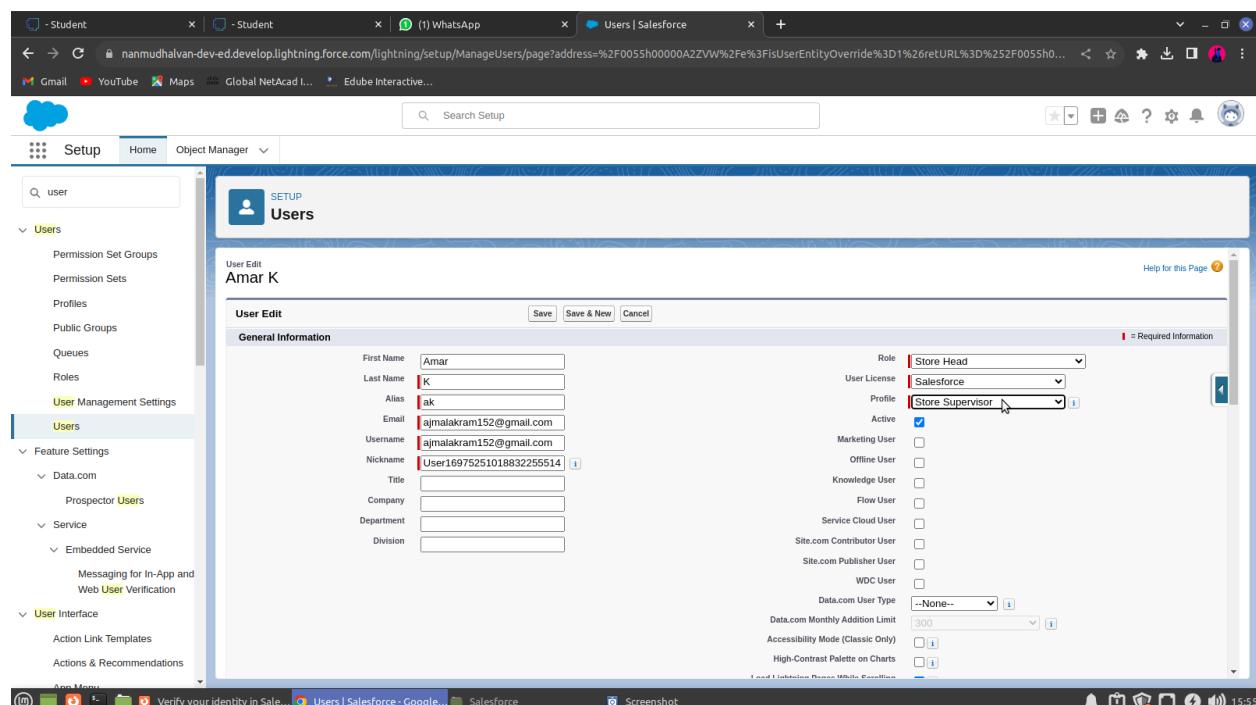
3.3 Users

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account.

Creating A User



The screenshot shows the Salesforce Setup interface under the Profiles section. The left sidebar includes categories like User Management Settings, Feature Settings, Service, and User Interface. The main content area displays a table of profiles, with the 'Billing Operator' profile selected. The table columns include Action, Profile Name, User License, and Custom. The 'Billing Operator' row shows it is assigned to the 'Salesforce Platform' license and is checked in the 'Custom' column.



The screenshot shows the Salesforce Setup interface under the Users section. The left sidebar includes categories like User Management Settings, Feature Settings, Service, and User Interface. The main content area shows the 'User Edit' screen for a user named 'Amar K'. The 'General Information' tab is active, displaying fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Role, User License, Profile, Active status, and various optional user types. The 'Role' field is set to 'Store Head', 'User License' to 'Salesforce', and 'Profile' to 'Store Supervisor'. The 'Active' checkbox is checked.

Creating another Users

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. On the left, a sidebar lists various setup categories like 'Permission Set Groups', 'Profiles', and 'Roles'. The main area displays the 'User Edit' screen for a user named 'John Teddy'. The 'General Information' section contains fields for First Name (John), Last Name (Teddy), Alias (tedd), Email (psychoaju1730@gmail.com), Username (psychoaju1730@gmail.com), Nickname (User16975253526783768537), Title (empty), Company (empty), Department (empty), and Division (empty). To the right, there are sections for 'Role' (set to 'Billing Operator'), 'User License' (set to 'Salesforce Platform'), 'Profile' (set to 'Billing operator'), and 'Active' status (checked). Other optional checkboxes include Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Data.com User Type (set to '--None--'), Data.com Monthly Addition Limit (set to 300), Accessibility Mode (Classic Only), and High-Contrast Palette on Charts.

This screenshot shows the same Salesforce Setup interface as the previous one, but with more settings visible. The 'General Information' section remains the same. Below it, the 'Single Sign On Information' section includes fields for Street, City, Zip/Postal Code, State/Province, and Country. The 'Locale Settings' section shows Time Zone (GMT+05:30 India Standard Time (Asia/Kolkata)), Locale (English (India)), and Language (English). The 'Approver Settings' section includes fields for Delegated Approver and Manager, and a dropdown for 'Receive Approval Request Emails' (set to 'Only if I am an approver'). At the bottom, there is a checkbox for 'Generate new password and notify user immediately'. The 'Save' button is at the bottom right of the form.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Akram, Amal	Aakra	amalaikram152@salesforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Chatter Expert	Chatty	chaty.00df90000008ny47eac.cs0euzebek@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	K. Amal	ak	amalaikram152@gmail.com	Store Head	<input checked="" type="checkbox"/>	Store Supervisor
<input type="checkbox"/>	Teddy, John	tedd	psychoeui1730@gmail.com	Billing Operator	<input checked="" type="checkbox"/>	Billing operator
<input type="checkbox"/>	User, Integration	integ	integration/00d5h0000008ny47eac.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User, Security	sec	insightssecurity@00d5h0000008ny47eac.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

3.4 User Adoption & Approval

It is the interaction with database and their records.

Create Our Customer Record

Category	App	Description
All Items	Accounts	Communication Subscription Channel Ty... Files Orchestration Runs Salesforce Scheduler Setup Assistant
	Alert Settings	Communication Subscription Consents Finance Balance Snapshots Orchestration Work Items Scorecards
	Alternative Payment Methods	Communication Subscription Timings Finance Transactions Orders Security Policies
Analytics	Communication Subscriptions	Forecasts Org Metrics Sellers

The screenshot shows the Salesforce Lightning Experience. A modal window titled "New our_customer" is open, prompting for information about a new customer named "aja". The "Information" section includes fields for "our_customer Name" (aja), "customer_name" (aju), "customer_mail" (aja@mail.com), and "customer_number" (789456132). The "Feedback" field contains the value "good". The "Owner" field is set to "Ajmal Akram". The "Inventory" section has a search bar for "Search Inventories...". At the bottom of the modal are buttons for "Cancel", "Save & New", and a blue "Save" button. The background shows a sidebar with "Recently Viewed" items: "our_customer Name" (mythili, Anjali), "Retailers", "Inventories", "Fragrance products", "Skincare products", "Reports", and "Dashboards". The top navigation bar includes tabs for "Student", "WhatsApp", "New our_customer | Salesfor...", and other browser tabs.

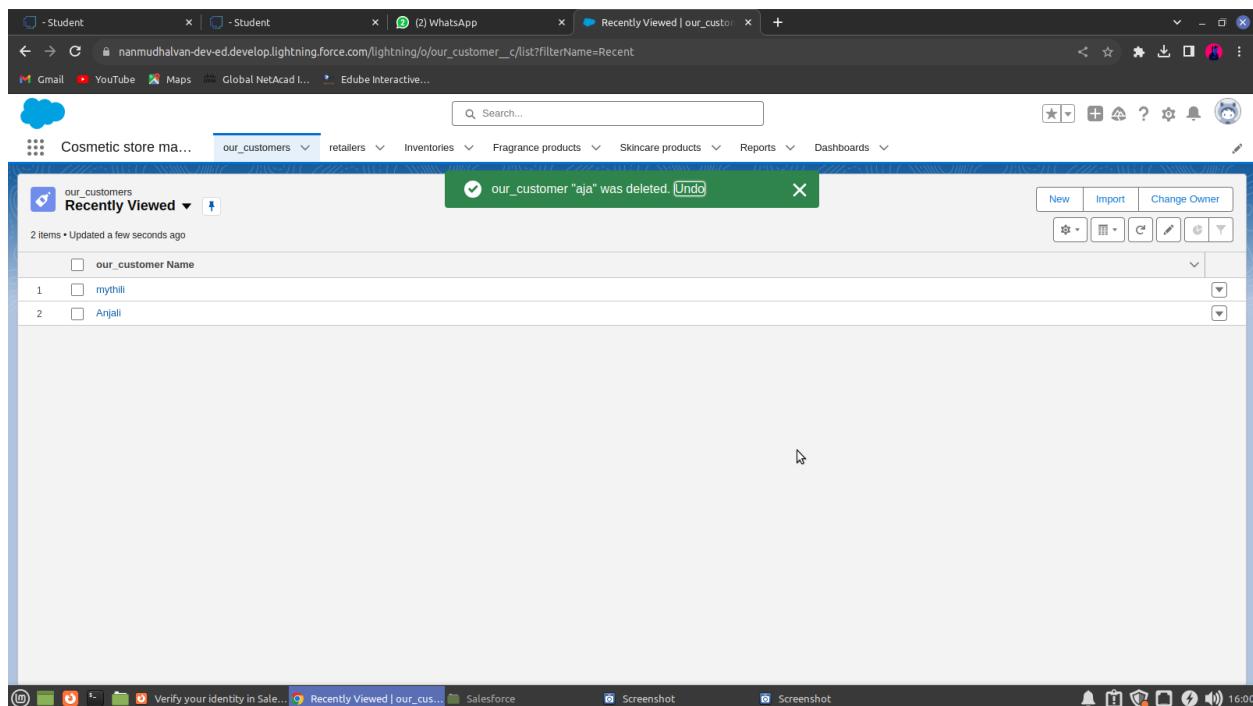
View Record (Our Customer)

The screenshot shows the Salesforce Lightning Experience. A list view for "our_customer" records is displayed, showing three entries: "aja", "mythili", and "Anjali". The top navigation bar includes tabs for "Student", "WhatsApp", "Recently Viewed | our_cus...", and other browser tabs. The background shows a sidebar with "Recently Viewed" items: "our_customer Name" (mythili, Anjali), "Retailers", "Inventories", "Fragrance products", "Skincare products", "Reports", and "Dashboards". The top navigation bar includes tabs for "Student", "WhatsApp", "Recently Viewed | our_cus...", and other browser tabs.

The screenshot shows a Salesforce Lightning page for a customer named 'aja'. The top navigation bar includes tabs for Student, Student, WhatsApp, and a specific record for 'aja | our_customer | Salesfor...'. Below the bar, the main header has a cloud icon, the title 'Cosmetic store ma...', a search bar, and various navigation links like 'our_customers', 'retailers', 'Inventories', 'Fragrance products', 'Skincare products', 'Reports', and 'Dashboards'. The main content area displays the customer details for 'aja', including fields for Name, Owner (Ajmal Akram), and various contact information. On the right side, there's an 'Activity' section with a timeline view and a message indicating 'No activities to show.' The bottom of the screen shows the standard Salesforce navigation bar with icons for New, Import, Change Owner, and other utilities.

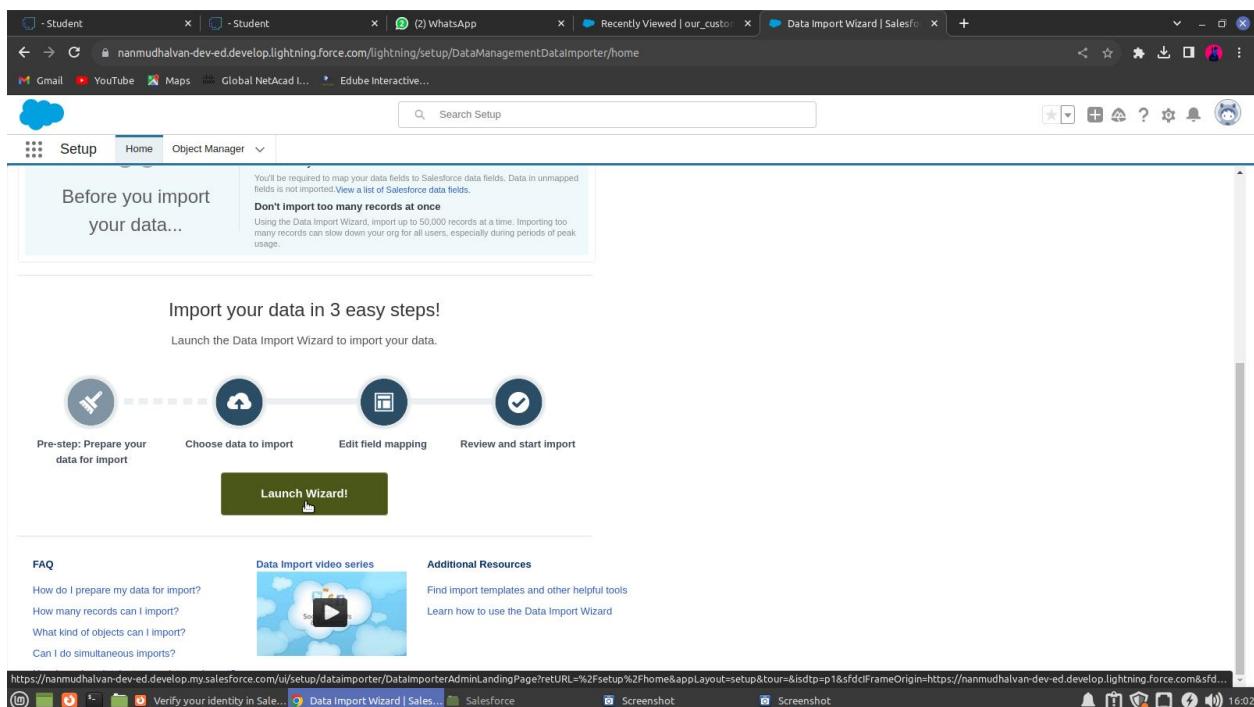
Delete Record (Our Customer)

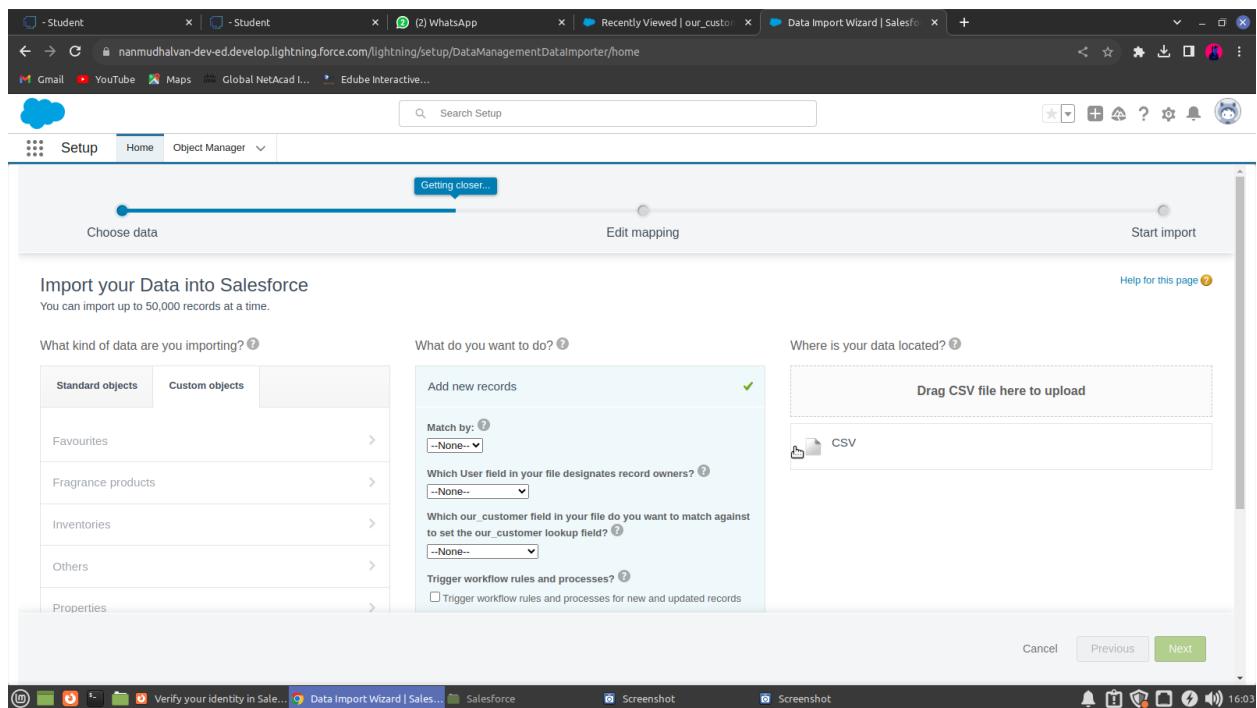
This screenshot shows the same Salesforce Lightning environment as the previous one, but with a modal dialog box open. The modal is titled 'Delete our_customer' and contains the question 'Are you sure you want to delete this our_customer?'. It features two buttons at the bottom: 'Cancel' and a highlighted 'Delete' button. The background of the page is dimmed, and the rest of the interface remains visible behind the modal.



Data Import

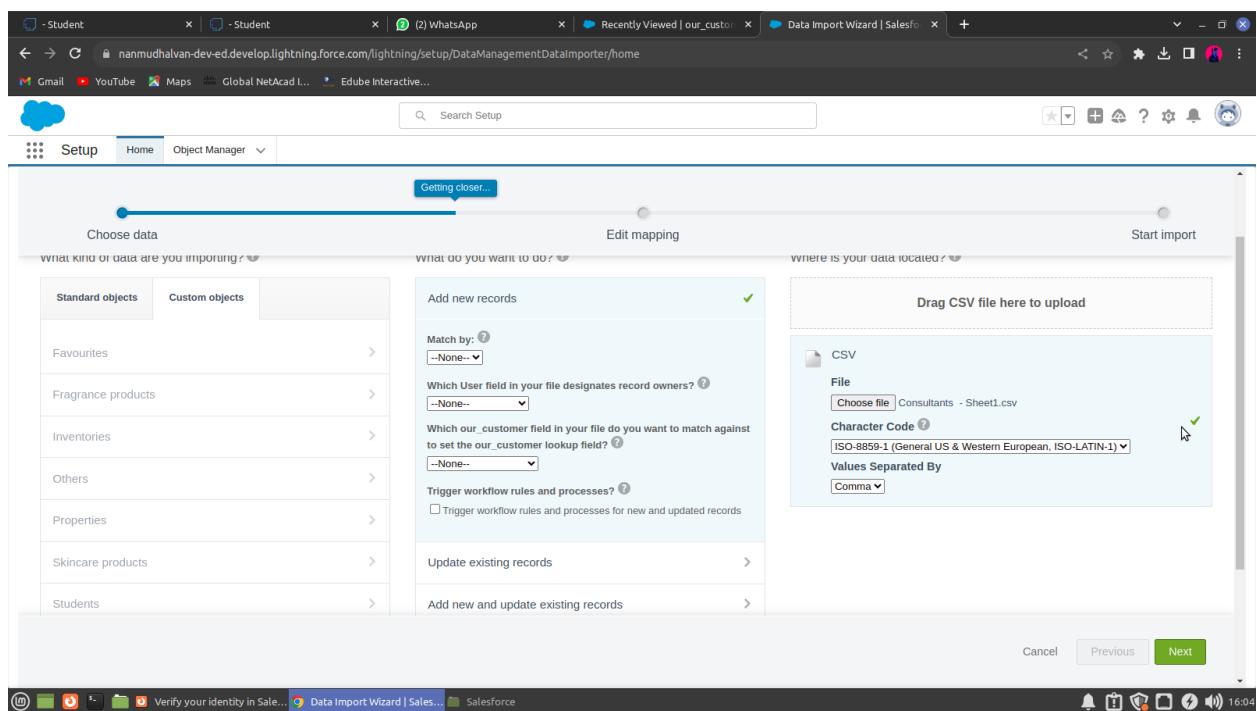
The Data Import Wizard is one of various tools available to Salesforce users for importing data. The tool is best used when importing data into the Account, Contact, Lead, or Solution objects along with any custom objects within your Salesforce organization





Downloading it via :

<https://tinyurl.com/Consultantsrecords> and Accessing to local storage.



Salesforce Data Import Wizard - Step 2 of 5

Almost done

Choose data Edit mapping Start import

Edit Field Mapping: consultants

Your file has been auto-mapped to existing Salesforce fields, but you can edit the mappings if you wish. Unmapped fields will not be imported.

Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	consultant Name	Consultant Name	Dev Raj	Ajith	Babu
Map	Unmapped ⓘ	Mobile Number	984638732	784653673	902839439
Change	Delivery type	Delivery Type	Self Pickup	Courier	Self Pickup
Change	Address	Address		Hyderabad	
Change	products	Products	Lipstick	Compact	Face Pack
Change	Payment	Payment	Cash	Upi	Credit Card
Map	Unmapped ⓘ	Email		ajith@gmail.com	Babu34@gmail.com

Cancel Previous Next

Verify your identity in Sales... Data Import Wizard | Sales... Salesforce

16:04

Salesforce Data Import Wizard - Step 3 of 5

Great job!

Choose data Edit mapping Start import

Review & Start Import

Review your import information and click Start Import.

Help for this page ⓘ

Your selections:

- consultants ✓
- Add new records ✓
- Consultants - Sheet1.csv ✓

Your import will include:

Mapped fields 5

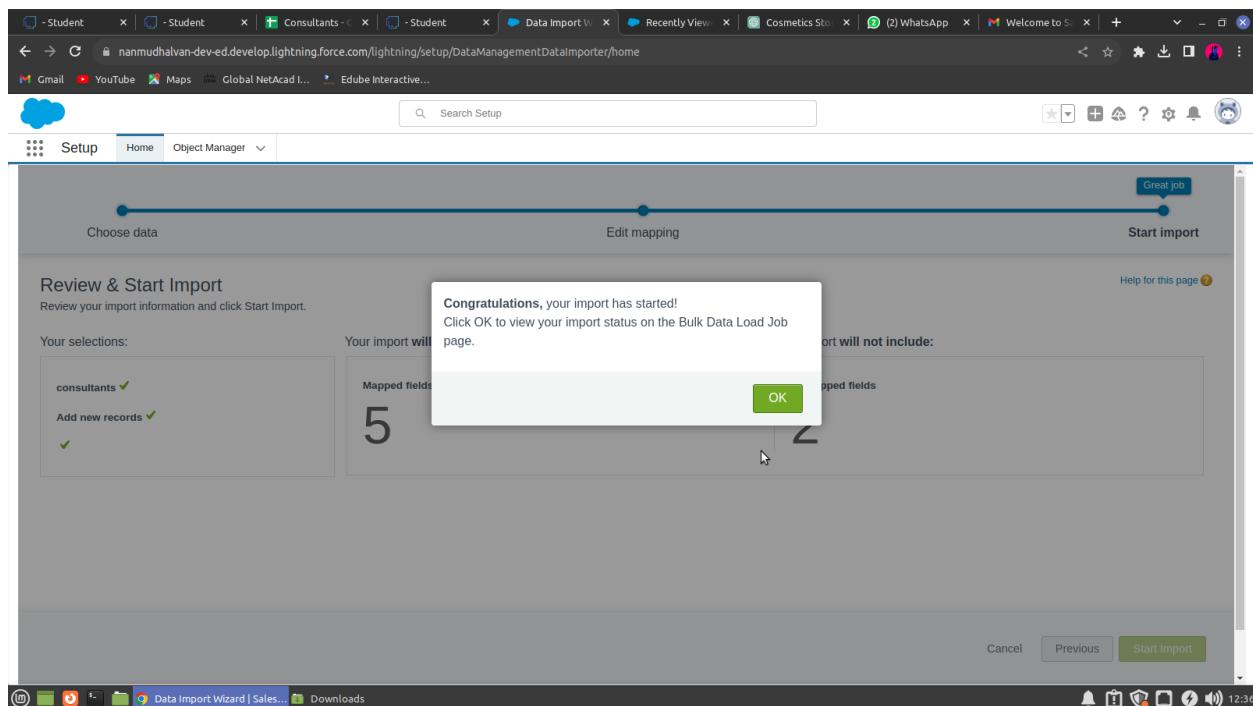
Your import will not include:

Unmapped fields 2

Cancel Previous Start Import

Verify your identity in Sales... Data Import Wizard | Sales... Salesforce

16:04



Bulk Data Load Job Detail

Job ID	7505h00000O7k2u	Submitted By	Aimal.Akram	Job Type	Bulk V1	Status	Closed
Start Time	17/10/2023, 4:04 pm IST	End Time	17/10/2023, 4:04 pm IST	Queued Batches	0	Total Processing Time (ms)	92
Time to Complete (hh:mm:ss)	00:00	Object	consultant	In Progress Batches	0	API Active Processing Time (ms)	48
External ID Field		Content Type	CSV	Completed Batches	1	Apex Processing Time (ms)	0
Concurrency Mode	Parallel	API Version	59.0	Failed	0	Records Processed	9
				Progress	100%	Records Failed	3
				Retries	0	Retry Count	0

Batches

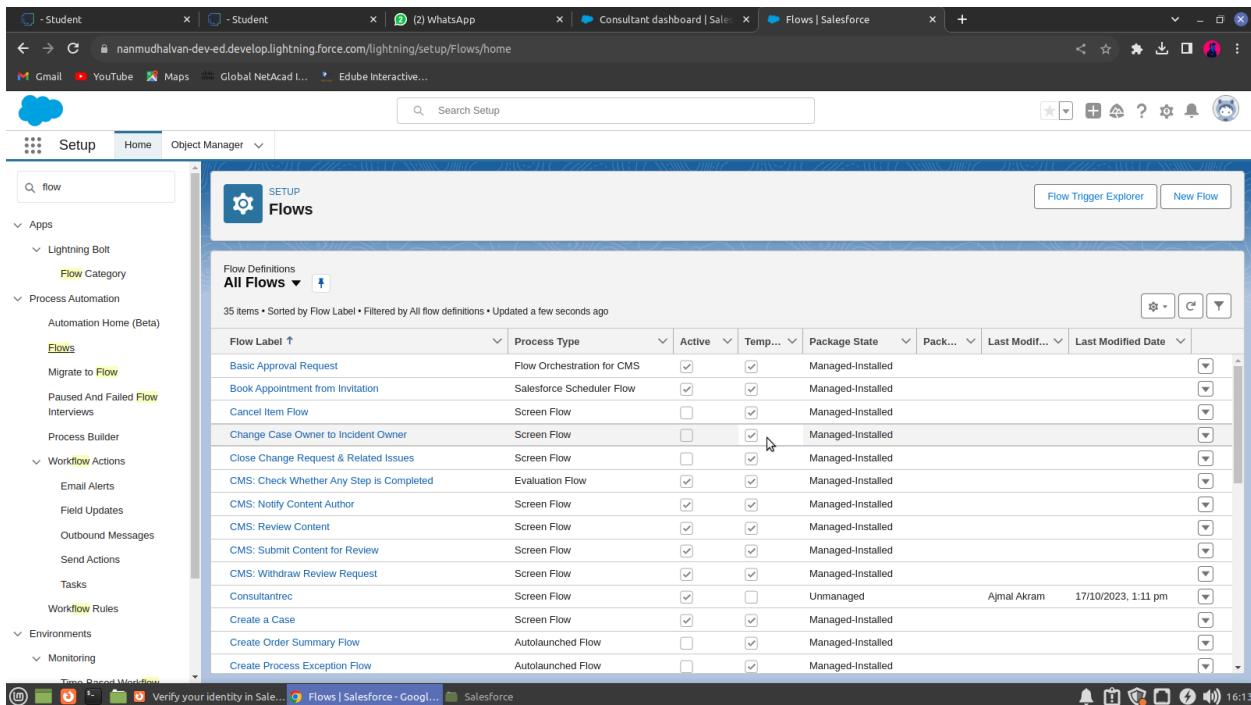
View Request	View Result	Batch ID	Start Time	End Time	Total Processing Time (ms)	API Active Processing Time (ms)	Apex Processing Time (ms)	Records Processed	Records Failed	Retry Count	State Message	Status
View Request	View Result	7515h00000WtABU	17/10/2023, 4:04 pm	17/10/2023, 4:04 pm	92	48	0	9	3	0	Completed	

CHAPTER-4

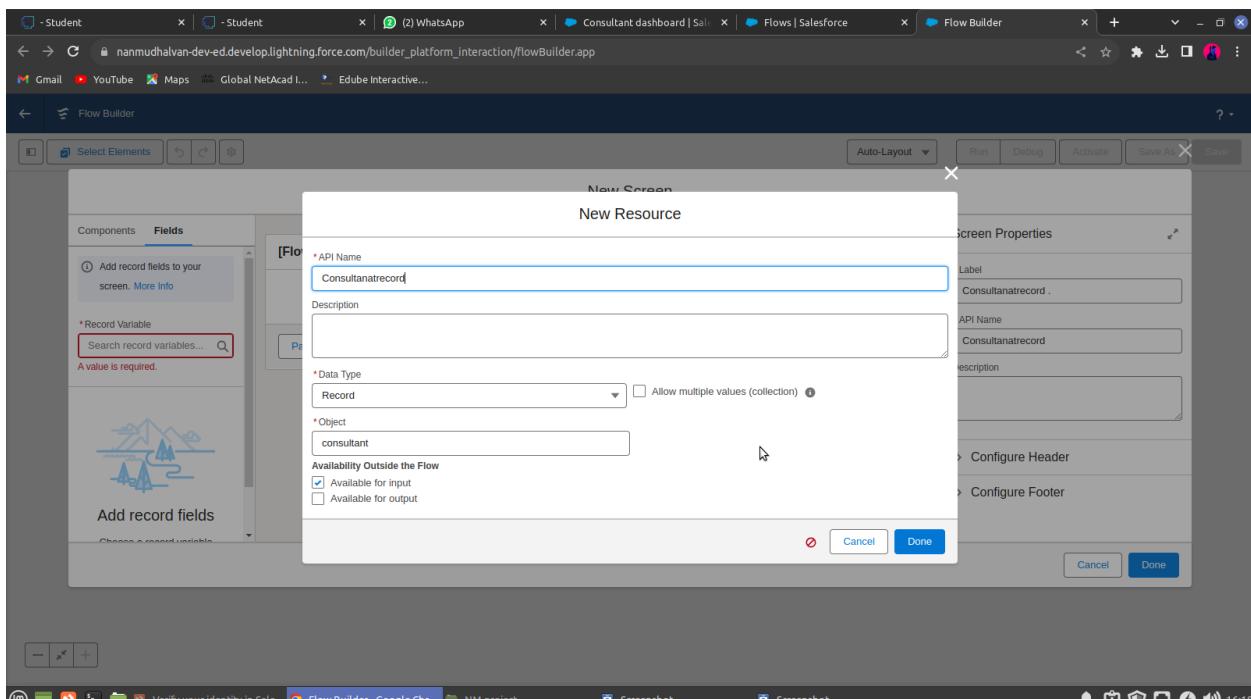
AUTOMATION

4.1 Flow

The last business rule functionality to implement before testing your application is a rule to set the Out-of-State checkbox field on the Travel Approval object if out-of-state travel has been chosen. Salesforce offers workflow capabilities that provide a declarative, drag-and-drop design environment to build our business process logic.



This screenshot shows the Salesforce Setup interface with the 'Flows' tab selected. The left sidebar navigation includes 'Automation Home (Beta)', 'Process Automation', 'Workflow Actions', and 'Environments'. The main area displays a table of 'Flow Definitions' with columns for 'Flow Label', 'Process Type', 'Active', 'Temp...', 'Package State', 'Pack...', 'Last Modif...', and 'Last Modified Date'. The table lists various flows such as 'Basic Approval Request', 'Book Appointment from Invitation', and 'Consultantrec'. A search bar at the top right says 'Search Setup'.



This screenshot shows the 'Flow Builder' interface. A modal window titled 'New Resource' is open, prompting for an 'API Name' (set to 'Consultanaterecord'), 'Data Type' (set to 'Record'), and 'Object' (set to 'consultant'). The 'Availability Outside the Flow' section contains two checkboxes: 'Available for input' (checked) and 'Available for output' (unchecked). The 'Screen Properties' panel on the right shows the 'Label' as 'Consultanaterecord' and the 'API Name' as 'Consultanaterecord'. Buttons for 'Cancel' and 'Done' are at the bottom of the modal.

Flow Builder - nanmudhalvan-dev-ed.lightning.force.com

Screen Flow Start

Consultantrecordcreation Screen

newrecordconsultant Create Records

End

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 of This Object

*Object: consultant

Set Field Values for the consultant

Field	Value
Name	↳ A Consultanatrecord > consultant Name X
consultant_number__c	↳ # Consultanatrecord > consultant_number X
products__c	↳ Consultanatrecord > products X
Payment__c	↳ Consultanatrecord > Payment X

Add Field

Manually assign variables

Auto-Layout Run Debug Activate Save As Save

Flow Builder - nanmudhalvan-dev-ed.lightning.force.com

Your flow was activated.

Screen Flow Start

Consultantrecordcreation Screen

newrecordconsultant Create Records

End

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 of This Object

*Object: consultant

Set Field Values for the consultant

Field	Value
Name	↳ A Consultanatrecord > consultant Name X
consultant_number__c	↳ # Consultanatrecord > consultant_number X
products__c	↳ Consultanatrecord > products X
Payment__c	↳ Consultanatrecord > Payment X

Add Field

Manually assign variables

Auto-Layout Run Debug Deactivate Save As Save

CHAPTER-5

REPORTS & DASHBOARD

5.1 Reports

A Salesforce report is a list of data generated based on filter criteria. Salesforce Reports helped us predict trends and gives us the advantage to increase profits. The report builder provides a drag-and-drop interface to easily build and customize your reports.

The screenshot shows the Salesforce Reports page. At the top, there are several browser tabs: '- Student', '- Student', '(2) WhatsApp', 'Reports | Salesforce', and 'Home | Salesforce'. The main content area has a header with a search bar and buttons for 'New Report' and 'New Folder'. Below this is a table titled 'Recent' with one item: 'New consultants Report' in 'Private Reports' folder, created by Ajmal Akram on 17/10/2023, 12:49 pm. On the left, there is a sidebar with filters for 'Created by Me', 'Private Reports', 'Public Reports', 'All Reports', 'Folders', 'All Folders', 'Created by Me', 'Shared with Me', 'Favorites', and 'All Favorites'.

The screenshot shows the Salesforce Report Builder page. At the top, there are several browser tabs: '- Student', '- Student', '(2) WhatsApp', 'Report Builder | Salesforce', and 'Home | Salesforce'. The main content area has a header with a search bar and a 'Create Report' button. On the left, there is a sidebar titled 'Recently Used' with categories like 'All', 'Accounts & Contacts', 'Opportunities', 'Customer Support Reports', 'Leads', 'Campaigns', 'Activities', 'Contracts and Orders', 'Price Books, Products and Assets', and 'Administrative Reports'. The central area is titled 'Select a Report Type' with a search bar and a table titled 'Recently Used Report Types' showing 'consultants' under 'Report Type Name' and 'Standard' under 'Category'. On the right, there is a panel titled 'Details' showing 'consultants' as a 'Standard Report Type' with a 'Start Report' button, and sections for 'Created By You' (listing 'New consultants Report'), 'Created By Others' (listing 'No Reports Yet'), and 'Objects Used in Report Type' (listing 'Owner').

Screenshot of the Salesforce Report Builder interface showing a report titled "New consultants Report" for the "consultants" object.

The report preview shows 13 records:

	consultant: consultant Name	consultant_number	Delivery type	Payment
1	Dev Raj		- Self pickup	Cash
2	Ajith		- Courier	UPI
3	Babu		- Self pickup	Credit card
4	Swathi		- Courier	UPI
5	Ajay Kumar		- Courier	Debit card
6	Shankar		- Self pickup	Cash
7	Dev Raj		- Self pickup	Cash
8	Ajith		- Courier	UPI
9	Babu		- Self pickup	Credit card
10	Swathi		- Courier	UPI
11	Ajay Kumar		- Courier	Debit card
12	Shankar		- Self pickup	Cash
13		0		

A context menu is open over the last column, showing options like "Sort Ascending", "Sort Descending", "Group Rows by This Field", "Bucket This Column", "Show Unique Count", "Move Left", "Move Right", and "Remove Column".

Screenshot of the Salesforce Report Builder interface showing the "Edit Bucket Column" dialog for the "Payment" field.

The dialog shows the current bucket configuration:

- Field: Payment
- Bucket Name: (empty)
- Value: NetBank (3) (selected)
- Bucket: BUCKET
- Value: Cash (selected)

Below the main table, there are sections for "Unbucketed Values" and "New Bucket".

Buttons at the bottom of the dialog are "Cancel" and "Apply".

Screenshot of the Salesforce Report Builder interface showing the "Edit Bucket Column" dialog.

The dialog is titled "Edit Bucket Column" and shows the configuration for the "Payment" field. The "Bucket Name" field is empty. The "All Values (4)" section lists "NetBank (3)" and "Cash (1)". The "Search Values" section shows a table with two rows:

VALUE	BUCKET
Cash	Cash

There is also an unchecked checkbox for "Bucket remaining values as Other".

Buttons at the bottom include "Add Bucket", "Move To", "Cancel", and "Apply".

Screenshot of the Salesforce Report Builder interface showing the "Edit Bucket Column" dialog.

The dialog is titled "Edit Bucket Column" and shows the configuration for the "Payment" field. The "Bucket Name" field is empty. The "All Values (4)" section lists "NetBank (3)", "Cash (1)", and "UPI". The "Search Values" section shows a table with three rows:

VALUE	BUCKET
Credit card	NetBank
Debit card	NetBank
UPI	NetBank

There is also an unchecked checkbox for "Bucket remaining values as Other".

Buttons at the bottom include "Add Bucket", "Move To", "Cancel", and "Apply".

Screenshot of a Salesforce report titled "New consultants Report". The report displays data for 12 records across three categories: NetBanking, Cash, and Subtotal.

	Payment type	consultant: consultant Name	Delivery type	products
NetBanking (8)	Ajith	Courier	compact	
	Babu	Self pickup	Face pack	
	Swathi	Courier	Nail polish	
	Ajay Kumar	Courier	Lip balm	
	Ajith	Courier	compact	
	Babu	Self pickup	Face pack	
Swathi	Courier	Nail polish		
Ajay Kumar	Courier	Lip balm		
Subtotal				
Cash (4)	Dev Raj	Self pickup	Lipstick	
	Shankar	Self pickup	Face pack	
	Dev Raj	Self pickup	Lipstick	
	Shankar	Self pickup	Face pack	
Subtotal				
Total (12)				

Report navigation and search tools are visible at the top and bottom of the page.

View Report

Screenshot of the Salesforce Reports section showing the "Recent" report list. The "New consultants Report" is listed under the "Recent" category.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New consultants Report		Private Reports	Ajmal Akram	17/10/2023, 12:49 pm	

Left sidebar categories include Reports, Recent, Created by Me, Private Reports, Public Reports, All Reports, Folders, All Folders, Created by Me, Shared with Me, Favorites, and All Favorites.

Report navigation and search tools are visible at the top and bottom of the page.

5.2 Dashboard

A dashboard provides an interactive visual display of key metrics and trends. Multiple dashboard components can be shown together on a single dashboard layout, creating rich visual displays of multiple reports that have a common theme.

The screenshot shows the Salesforce Reports page. At the top, there is a navigation bar with links for Student, WhatsApp, Consultant dashboard | Sales, Home | Salesforce, and a search bar. Below the navigation bar, there is a header with a cloud icon, the text "Cosmetic store ma...", and a search bar. The main area is titled "Recent" and contains a table with one row:

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New consultants		Private	Ajmal Akram	17/10/2023, 12:49 pm	

On the left side, there is a sidebar with categories: Created by Me, Private Reports, Public Reports, All Reports, FOLDERS, All Folders, Created by Me, Shared with Me, FAVORITES, and All Favorites. At the bottom of the page, there is a toolbar with icons for Report, Filter, Save, and Done, along with a timestamp of 16:10.

The screenshot shows the Salesforce Consultant dashboard. At the top, there is a navigation bar with links for Student, WhatsApp, Consultant dashboard | Sales, Home | Salesforce, and a search bar. Below the navigation bar, there is a header with a cloud icon, the text "Cosmetic store ma...", and a search bar. The main area is titled "Consultant dashboard" and contains a report component and a blank grid area.

The report component is titled "New consultants Report" and displays a bar chart titled "Record Count". The chart has two bars: "NetBanking" with a value of 8 and "Cash" with a value of 4. The Y-axis is labeled "Payment type". Below the chart, there is a link "View Report (New consultants Report)".

The main area below the report component is a large, empty grid with a "Save" button at the top right. At the bottom of the page, there is a toolbar with icons for Report, Filter, Save, and Done, along with a timestamp of 16:12.

The screenshot shows a Salesforce dashboard titled "Consultant dashboard". At the top, there is a navigation bar with links for "our_customers", "retailers", "Inventories", "Fragrance products", "Skincare products", "Reports", and "Dashboards". A search bar is located at the top center. On the left, a chart titled "New consultants Report" displays the record count for two payment types: NetBanking (8) and Cash (4). Below the chart is a link to "View Report (New consultants Report)". A green success message box is overlaid on the dashboard, stating "Dashboard saved". The bottom of the screen shows the standard Salesforce navigation bar with icons for Home, Sales, and other applications, along with the current date and time (16:13).

View Dashboard

This screenshot shows the same Salesforce dashboard after the user has saved it. The chart data has been updated to reflect the changes made. The "NetBanking" category now has a value of 8, and the "Cash" category has a value of 4. The rest of the interface remains the same, including the navigation bar, search bar, and the "Dashboard saved" message which is no longer present.

CHAPTER-6

CONCLUSION

In conclusion, the Salesforce-based Customer Store Management project aims to address the significant challenges faced by employees in cosmetics stores when it comes to managing customer records, processing orders, and generating discount coupons. The project's primary goal is to create an efficient, automated system that enhances operational efficiency, reduces errors, and ultimately improves customer satisfaction.

Through the design and implementation of custom objects, user profiles, and automation tools, the project offers a unique and tailored solution for cosmetics stores. The use of Salesforce as the platform ensures a secure, scalable, and customizable environment to meet the specific needs of the business.

By streamlining data entry, order processing, and coupon generation, this project not only simplifies the daily tasks of employees but also contributes to the store's growth and success. It enables personalized customer engagement, data-driven decision-making, and efficient management of customer relationships.

The project emphasizes the social impact of enhancing the customer experience, potentially leading to increased customer loyalty and revenue. It also aligns with the digital transformation trend in the retail industry, where businesses are leveraging technology to stay competitive and meet customer expectations.

In summary, the Salesforce Customer Store Management project has the potential to revolutionize how cosmetics stores operate, providing a competitive advantage and customer-centric approach that can lead to long-term success in the industry.

CHAPTER-7

PROJECT DEMONSTRATION

GitHub:

https://github.com/manoj9122002/Manoj_0D86BF6EB6A7346A0774BEE53BB0A7AF

Demo Link:

<https://drive.google.com/file/d/1EkdrmRRWMPPeAohAYiN-J0D9DnVXoSPY/view?usp=drivesdk>