

# Property Management Application using Salesforce



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## PROJECT REPORT

Submitted by

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*in*  
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**AVS ENGINEERING COLLEGE**

**AMMAPET, SALEM- 636 003**

**ANNA UNIVERSITY :: CHENNAI 600 025**

## **BONAFIDE CERTIFICATE**

Certified that this project report “**Property Management Application using Salesforce**” is the bonafide work of “**PAVITHRA. G (au620120104072), SREEDEVI. K (au620120104098), MALATHI. V (au620120104057), VIGNESHWARI. G (au620120104319), SIVARANJANI. S (au620120104093)**” who carried out the project work under my supervision.

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**SPOC**

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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**

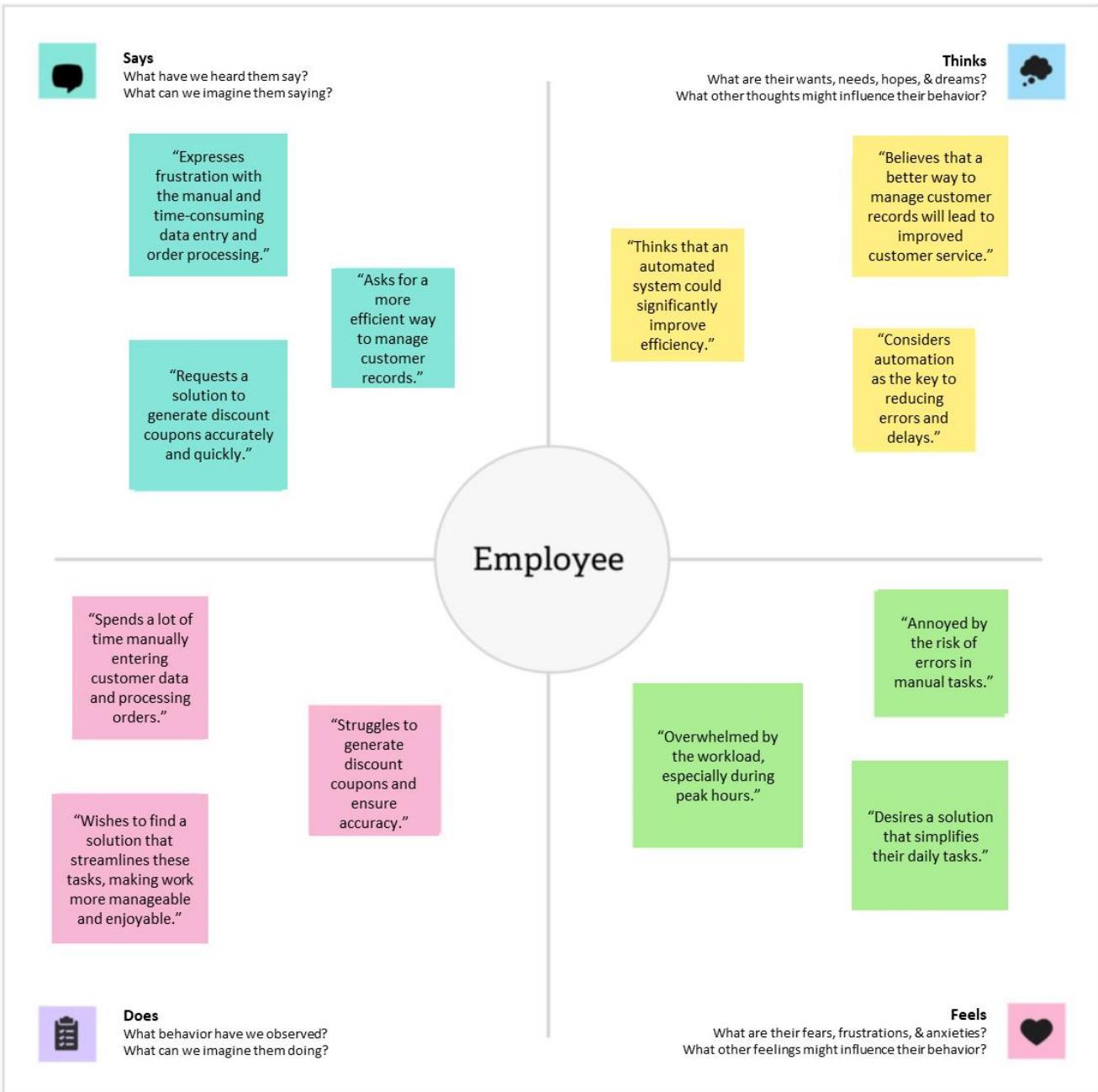
<b>Problem for</b>	<b>Trying to</b>	<b>But</b>	<b>Which makes</b>
<b>Employee</b>	I'm working in a cosmetics store, and I'm trying to efficiently manage customer records, process orders, and generate discount coupons for various types of employees.	But the manual and time-consuming nature of these tasks, 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
<b>Custom Object Creation</b>	Create custom objects for "Our Customers," "Consultants," "Retailers," and "Others" to manage customer data, order details, and employee information.
<b>User Profiles and Roles</b>	Set up user profiles and roles to control access and permissions for different user groups, including "Store Head" and "Billing Operator."
<b>Automation</b>	Implement automation using triggers, flows, and approval processes to automate coupon generation, data validation, and record updates.
<b>Reports and Dashboards</b>	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.
<b>Data Modeling</b>	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

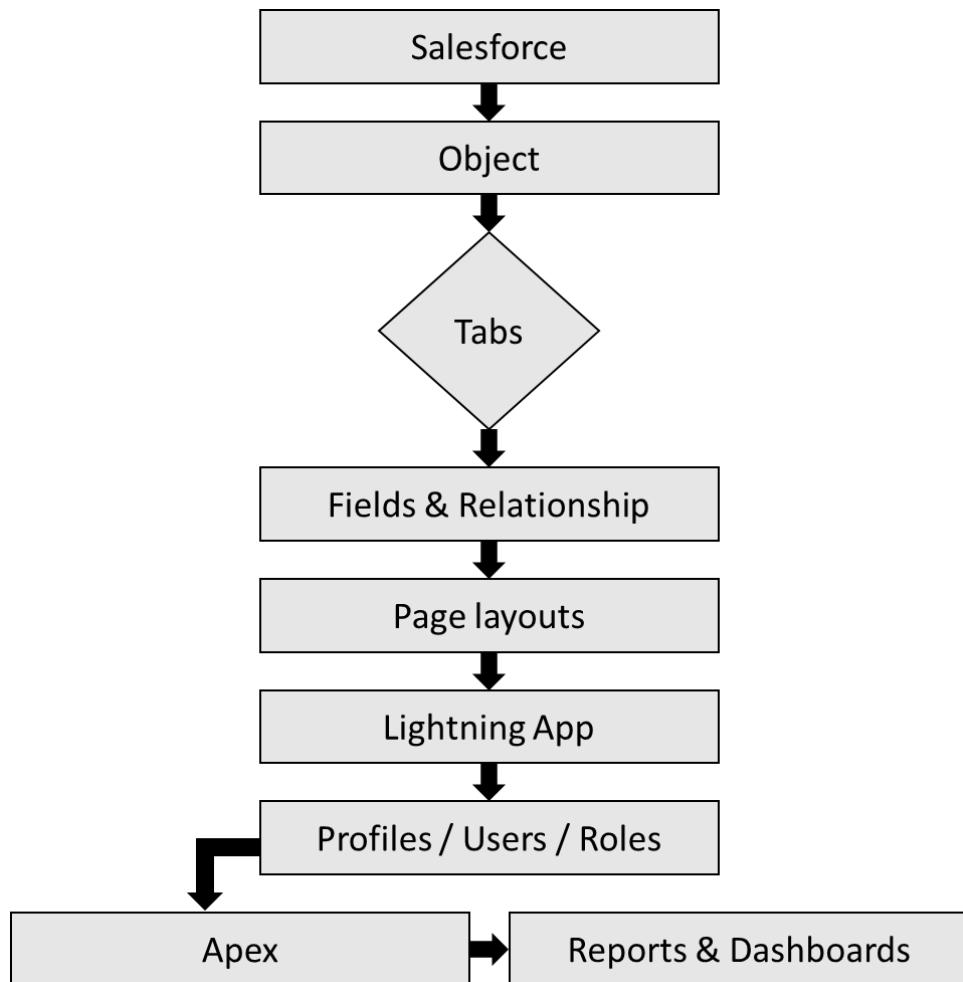
Requirement	Description
<b>Salesforce Developer Org</b>	Create a Salesforce developer org for project development and testing.
<b>Lightning App</b>	Create a Lightning app to brand the application and provide a customized color scheme and logo.
<b>Automation Tools</b>	Use Apex triggers and flows to implement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

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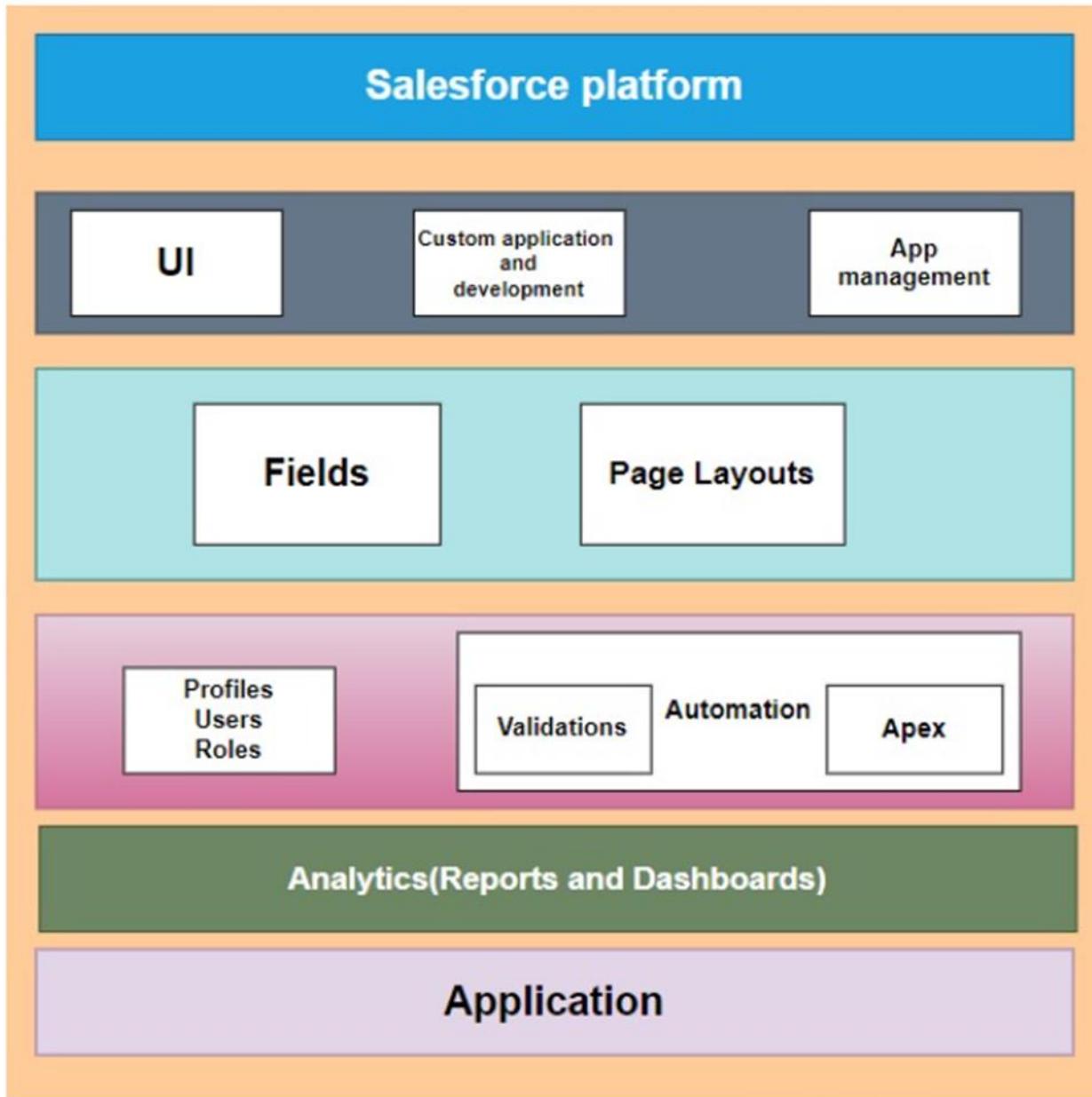
## 1.7 Project Road Map

### 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

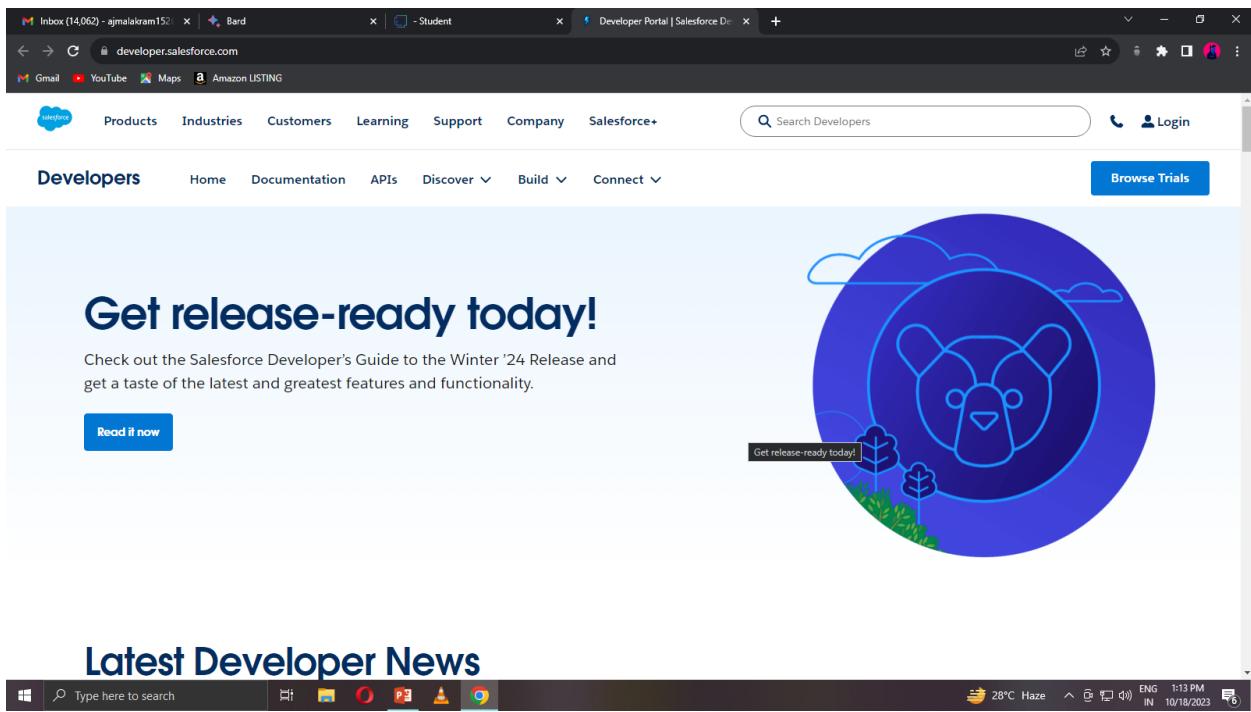


# CHAPTER-2

## PREPARATION DATA MODELING

### 2.1 Salesforce Developer Org

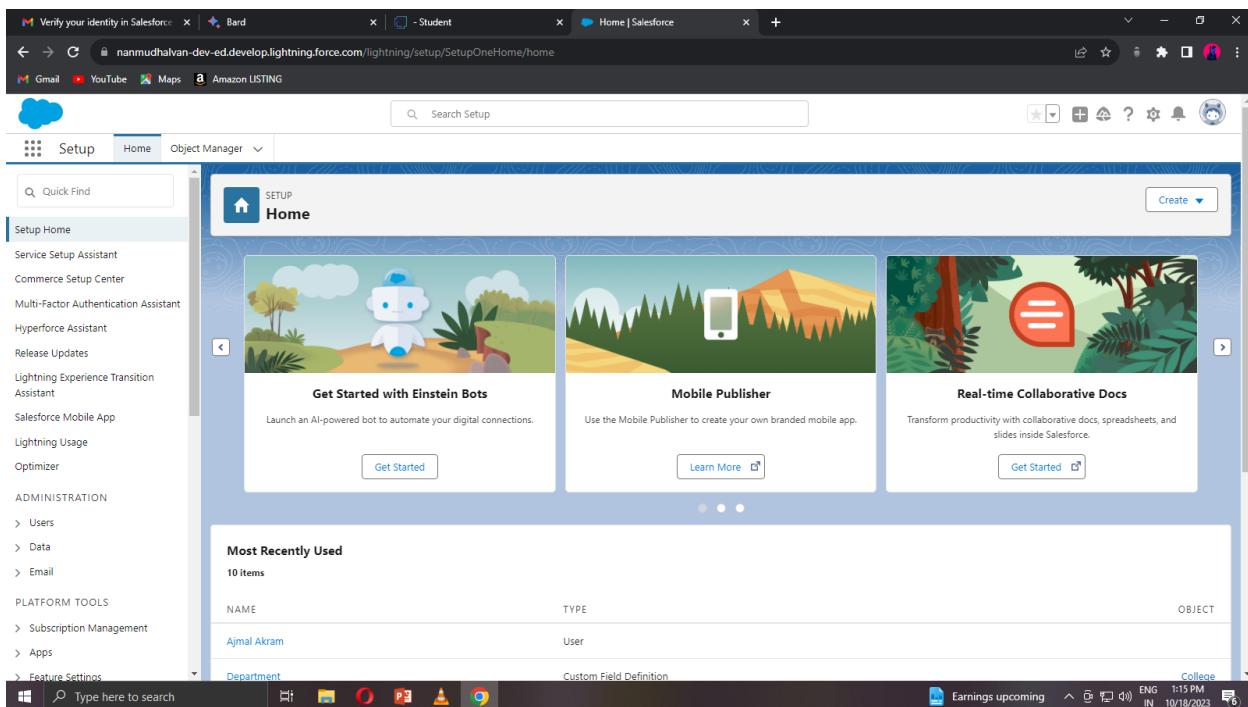
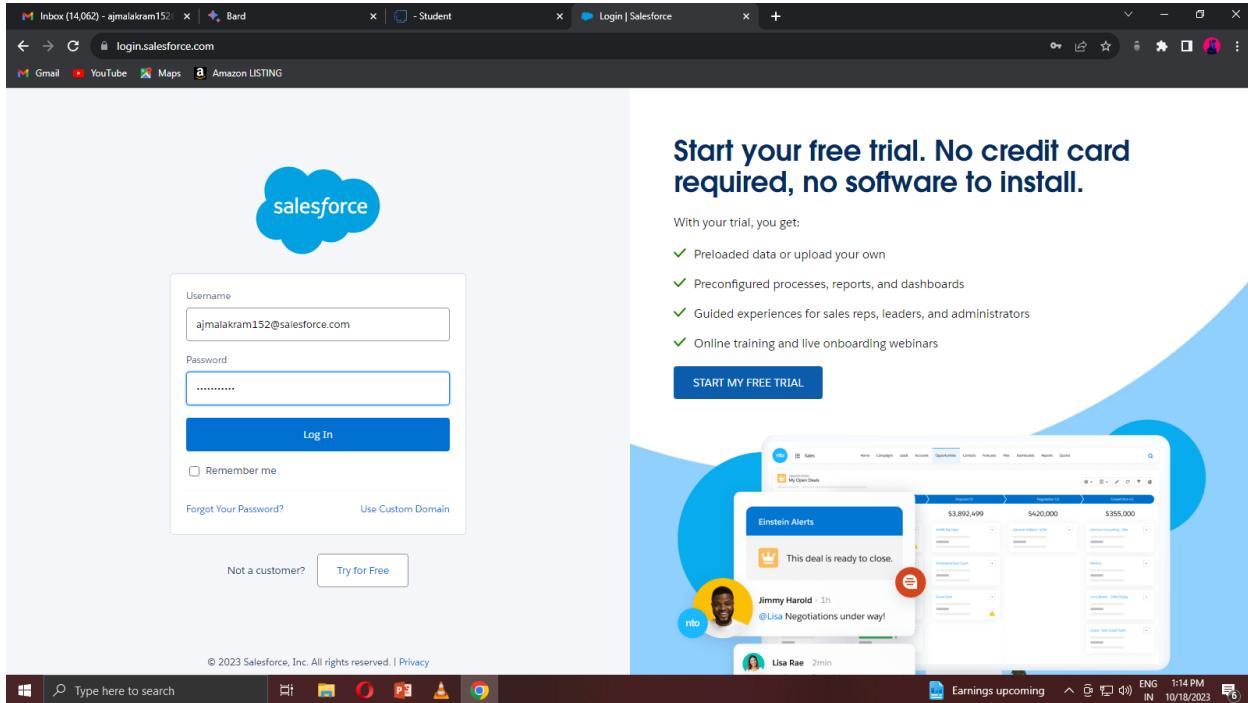
In Salesforce, a Developer Sign Up or Developer Edition is a special type of Salesforce environment that is primarily used for development, testing, and



learning purposes.

## Account Activation

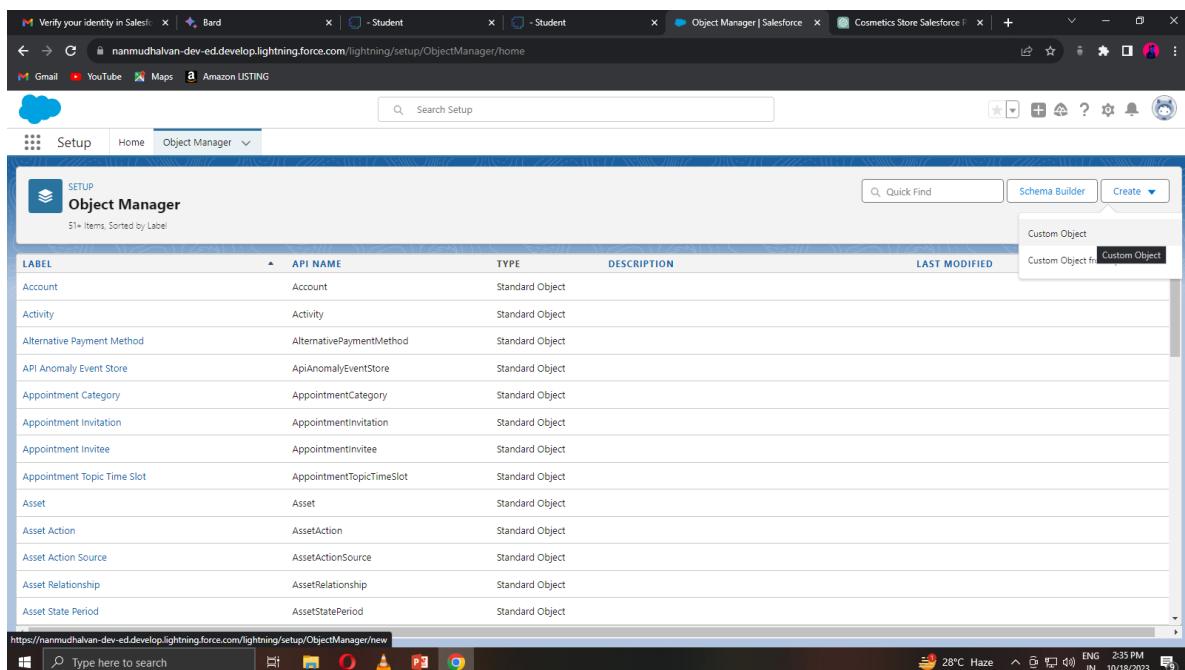
Activation tracks information about devices from which users have verified their identity.



## 2.2 Object Creation

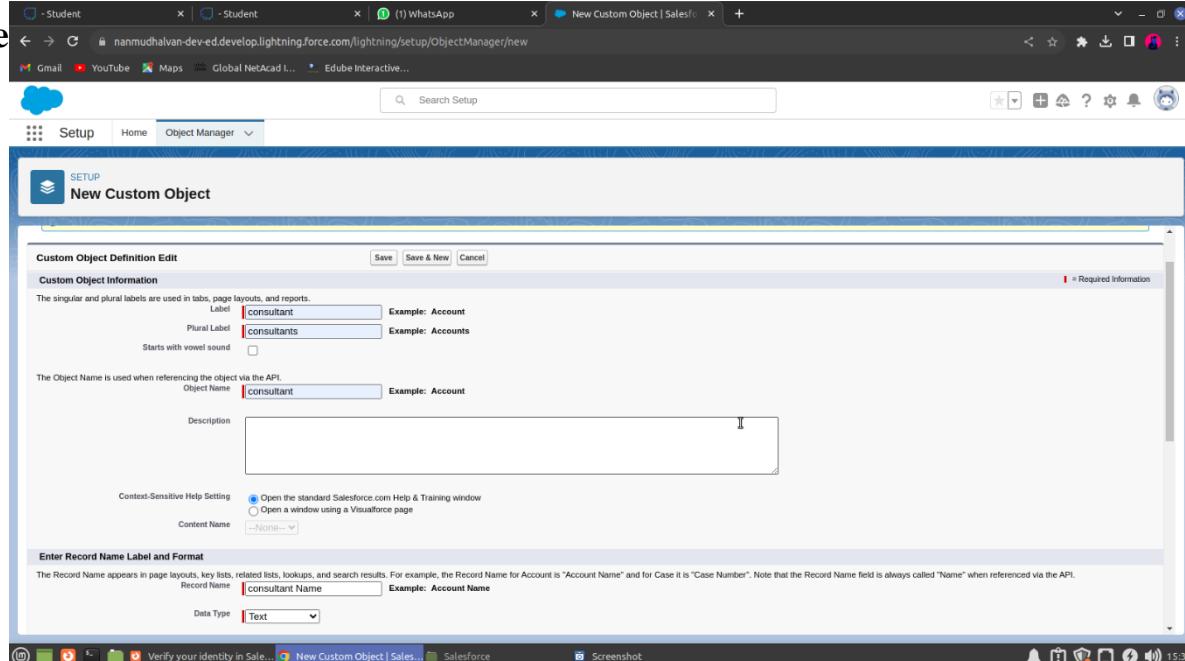
Salesforce objects are database tables that permit you to store data that is specific to an organization. Salesforce objects are of two types: Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc. Custom objects: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

### Create the Consultants Object

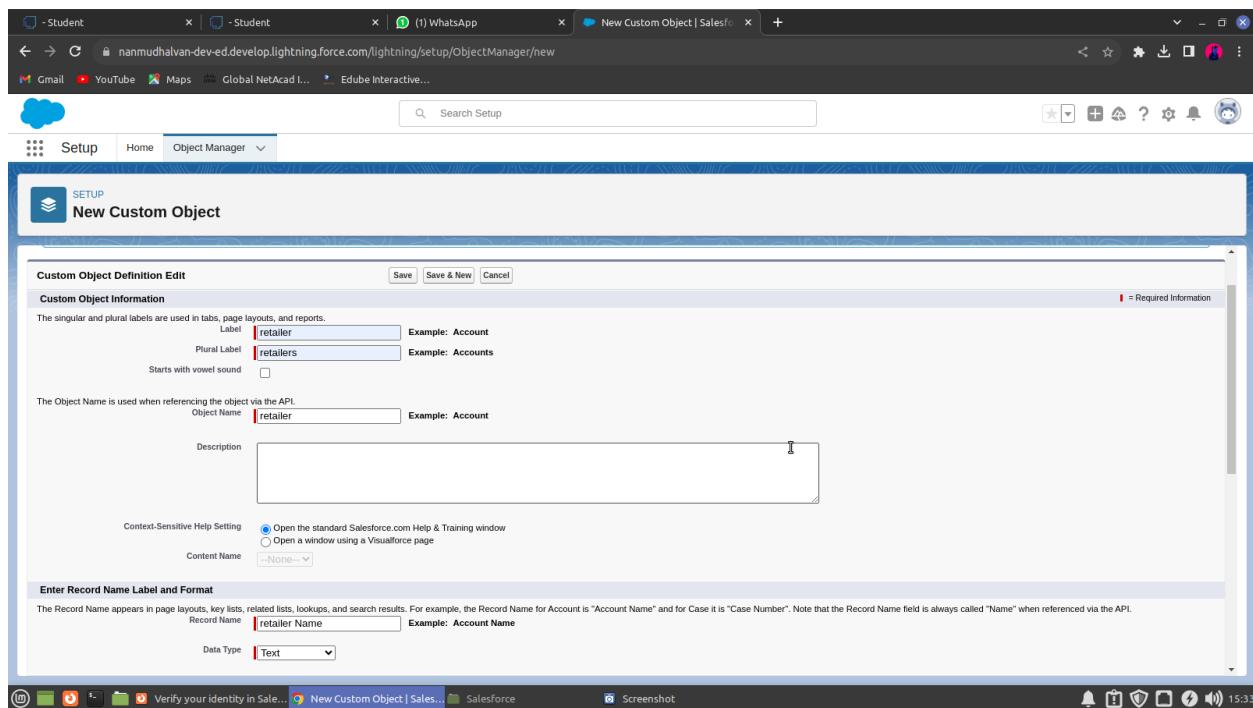


The screenshot shows the Salesforce Object Manager page. At the top, there is a navigation bar with tabs for Setup, Home, and Object Manager. A search bar labeled "Search Setup" is located at the top right. Below the navigation bar, the title "Object Manager" is displayed, followed by a subtitle "51+ Items, Sorted by Label". On the right side of the main area, there are buttons for "Schema Builder" and "Create". A dropdown menu is open under the "Create" button, showing options like "Custom Object" and "Custom Object from...".

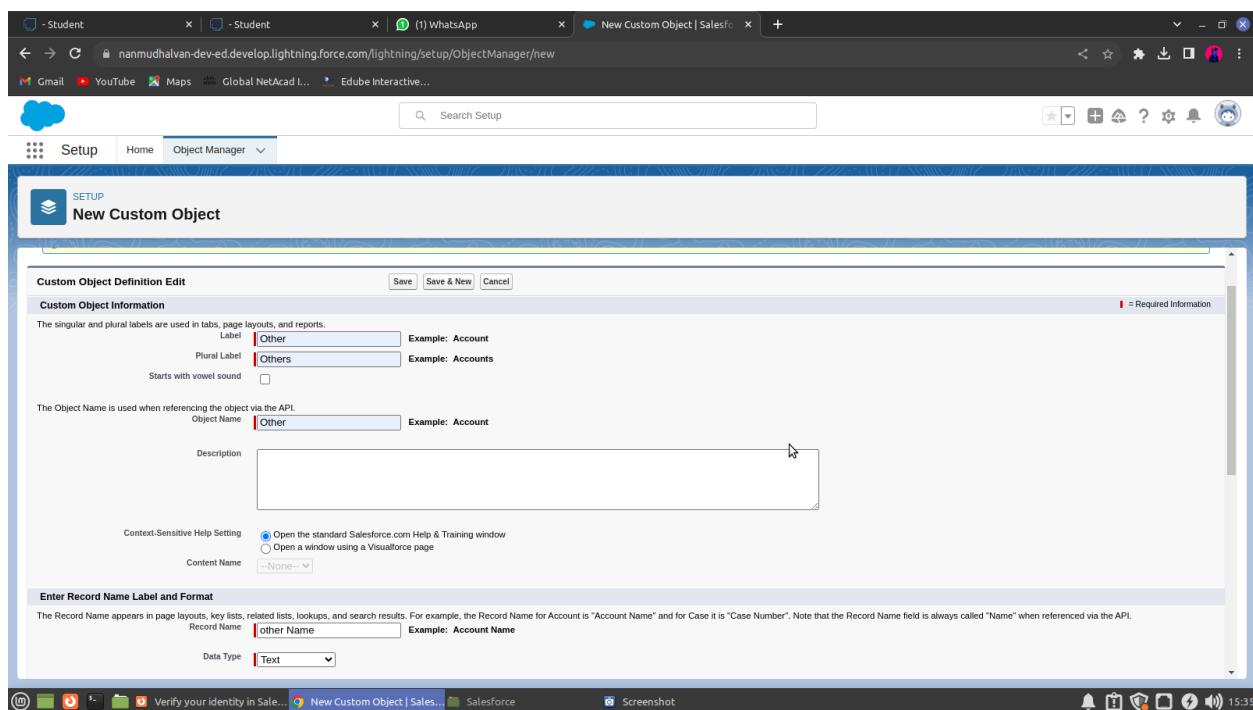
LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED
Account	Account	Standard Object		
Activity	Activity	Standard Object		
Alternative Payment Method	AlternativePaymentMethod	Standard Object		
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object		
Appointment Category	AppointmentCategory	Standard Object		
Appointment Invitation	AppointmentInvitation	Standard Object		
Appointment Invitee	AppointmentInvitee	Standard Object		
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object		
Asset	Asset	Standard Object		
Asset Action	AssetAction	Standard Object		
Asset Action Source	AssetActionSource	Standard Object		
Asset Relationship	AssetRelationship	Standard Object		
Asset State Period	AssetStatePeriod	Standard Object		



The screenshot shows the "New Custom Object" page in the Salesforce setup. The title "New Custom Object" is at the top. Below it, the section "Custom Object Information" contains fields for "Label" (set to "consultant") and "Plural Label" (set to "consultants"). There is also a checkbox "Starts with vowel sound" which is unchecked. The "Object Name" field is set to "consultant" with an example "Account". The "Description" field is empty. Under "Context-Sensitive Help Setting", the radio button "Open the standard Salesforce.com Help & Training window" is selected. The "Content Name" field is set to "-None-". The "Enter Record Name Label and Format" section includes a note about record names appearing in key lists, related lists, lookups, and search results. The "Record Name" field is set to "consultant Name" with an example "Account Name". The "Data Type" field is set to "Text".



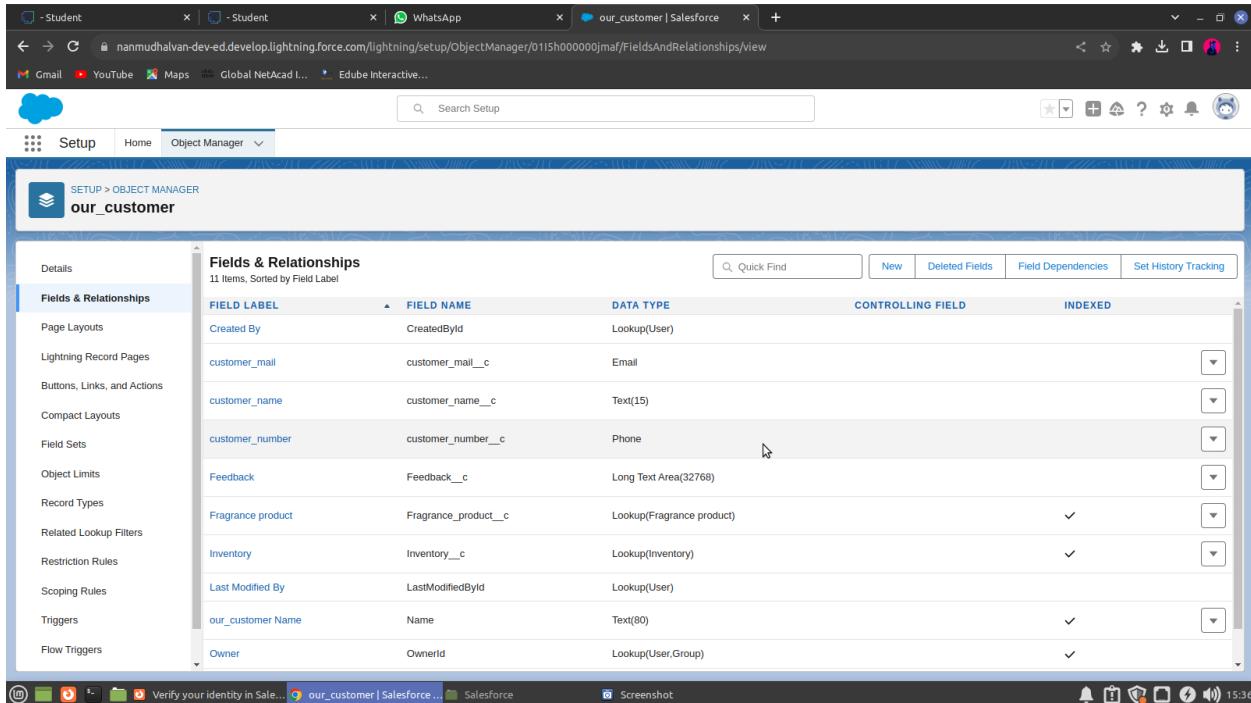
## Create the Others Object



## 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.

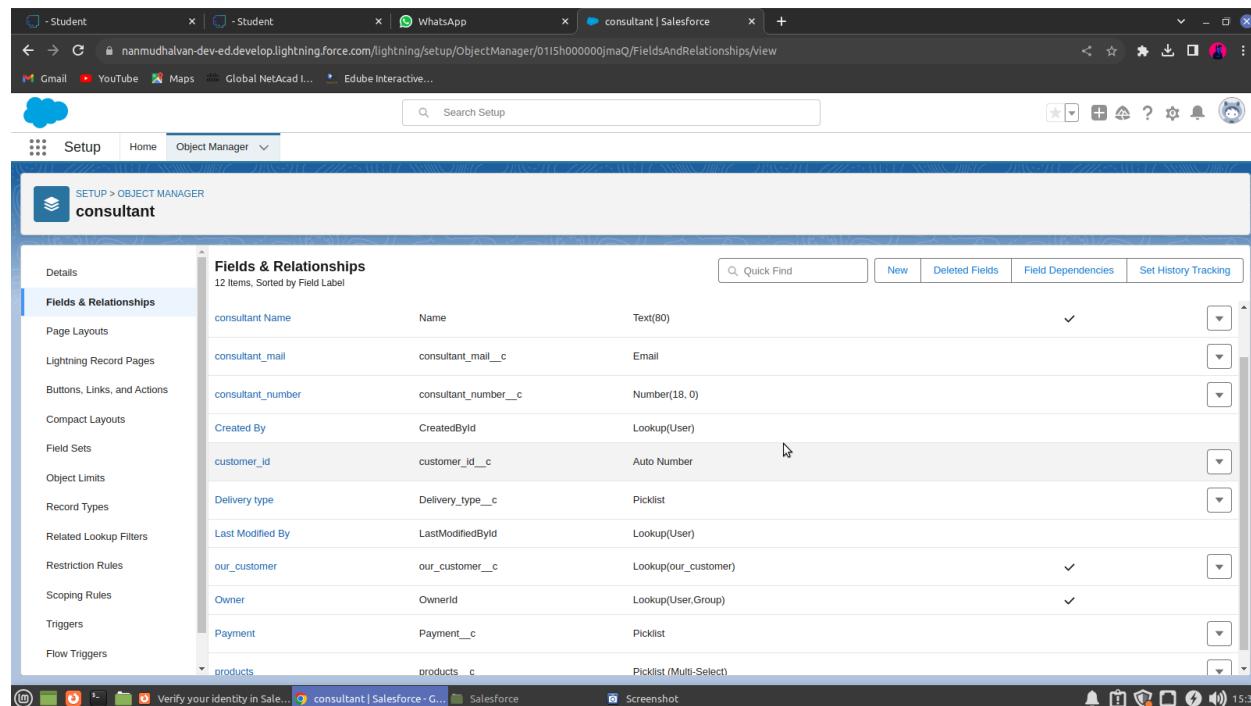
## Fields in Our\_Customers Objects



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 'products' (products\_\_c).

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

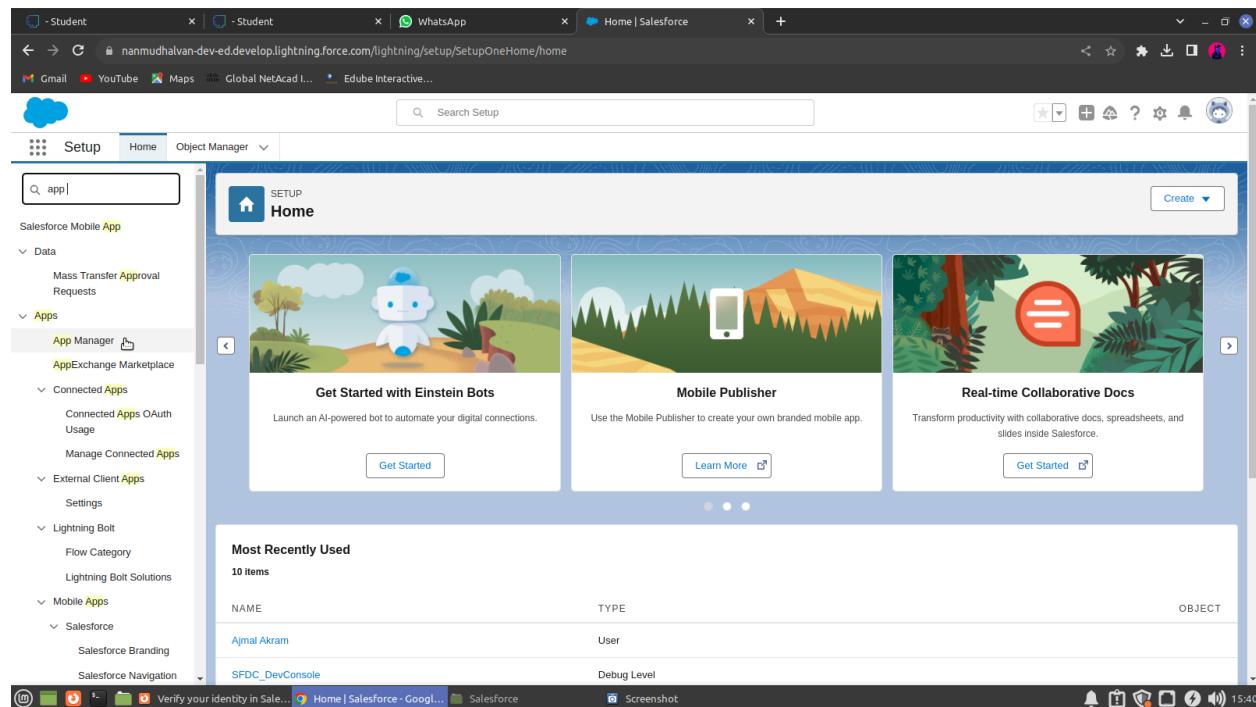
The screenshot shows the Salesforce Setup interface for the 'consultant' object. The left sidebar has 'Page Layouts' selected under 'Fields & Relationships'. The main area displays a table titled 'Page Layouts' with one item: 'consultant Layout' created by Ajmal Akram on 17/10/2023, 10:37 am, last modified by Ajmal Akram on 17/10/2023, 11:39 am. The table includes columns for 'PAGE LAYOUT NAME', 'CREATED BY', and 'MODIFIED BY'.

The screenshot shows the Salesforce Setup interface for the 'consultant' object, specifically the 'Layout Properties' for the 'consultant Layout'. The left sidebar has 'Page Layouts' selected. The main area shows the layout editor with various sections: 'Fields' (listing fields like consultant\_number, consultant\_name, consultant\_address, consultant\_email, delivery\_type, payment, created\_by, customer\_id, last\_modified\_by), 'Highlights Panel' (with a note to customize highlights), 'Quick Actions in the Salesforce Classic Publisher' (with a note about overriding global publisher actions), and 'Salesforce Mobile and Lightning Experience Actions' (with a note about overriding predefined actions). The top bar includes buttons for Save, Quick Save, Preview As..., Cancel, Undo, Redo, and Layout Properties.

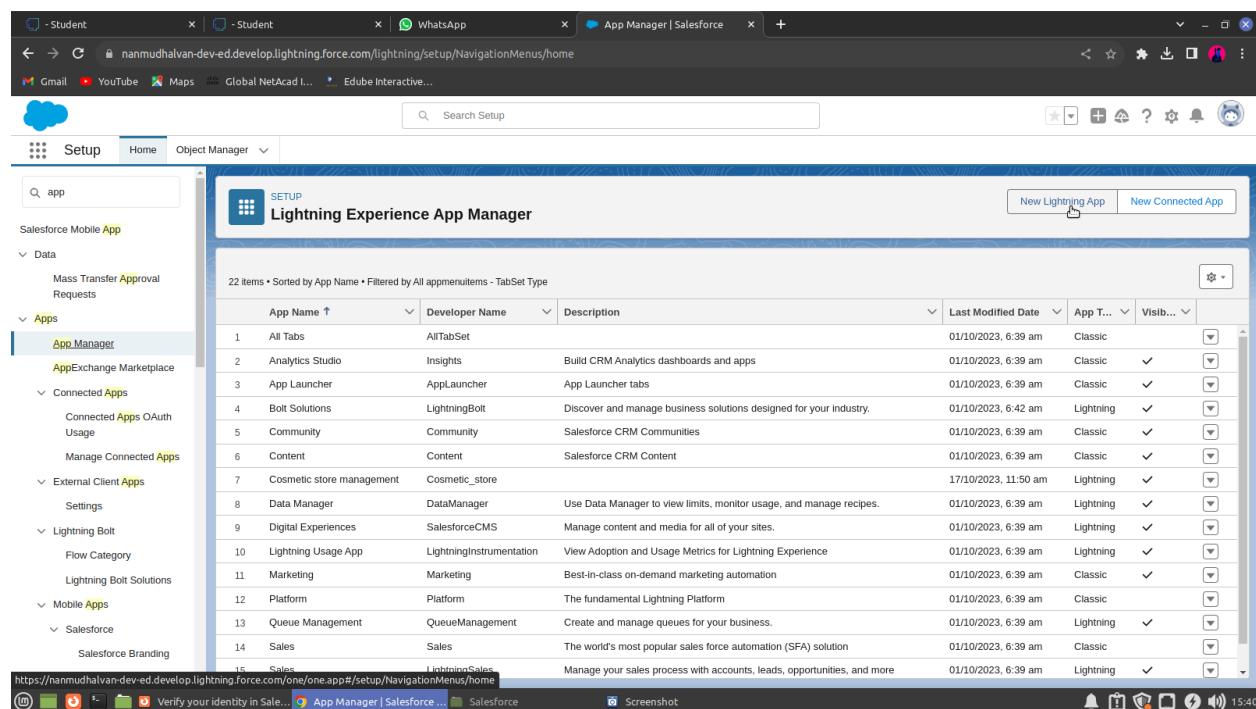
## 2.5 The Lightning App

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, displaying the 'App Manager' section under the 'Apps' category. The main content area features a 'Home' app card with three cards below it: '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 entries: 'Ajmal Akram' (User) and 'SFDC\_DeveloperConsole' (Debug Level). The top right corner of the main content area has a 'Create' button.



The screenshot shows the Lightning Experience App Manager page. The left sidebar is open, displaying the 'App Manager' section under the 'Apps' category. The main content area displays a table titled 'Lightning Experience App Manager' with 22 items. The columns are 'App Name', 'Developer Name', 'Description', 'Last Modified Date', 'App T...', and 'Visib...'. The table lists various apps such as 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 of the main content area has 'New Lightning App' and 'New Connected App' buttons.

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

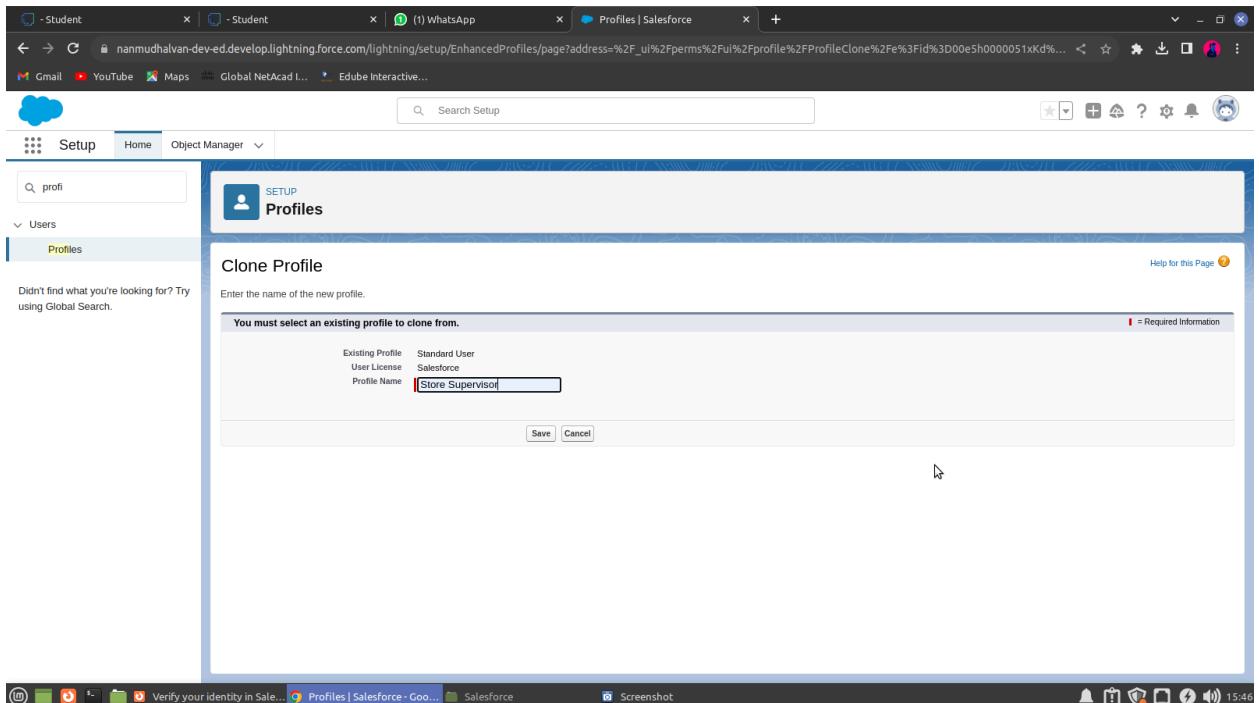
A profile is a group/collection of settings and permissions that define what a user can do in salesforce. A profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login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

### Creating a Profiles

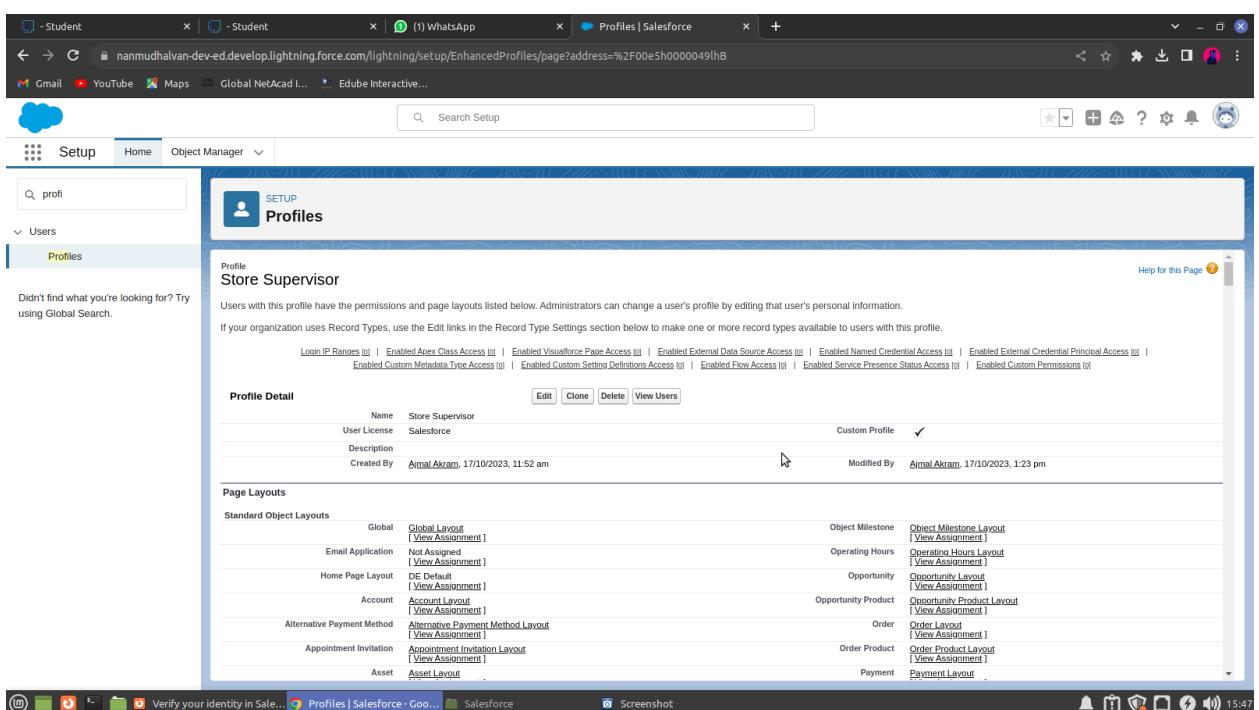
The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected under 'Users'. The search bar at the top left contains 'profi'. The main area displays a table titled 'Profiles' with columns for 'Action', 'Profile Name', 'User License', and 'Custom'. The table lists various profiles like 'Analytics Cloud Integration User', 'Authenticated Website', and 'Salesforce Platform'. The 'Salesforce Platform' row is highlighted with a blue background. At the bottom of the table, there are navigation links for 'Previous' and 'Next' pages, and a note indicating '1-25 of 41' profiles found.

The screenshot shows the Salesforce Setup interface with the 'Standard User' profile selected under 'Profiles'. The search bar at the top left contains 'profi'. The main area displays the 'Profile Detail' section for the 'Standard User'. It shows the profile's name ('Standard User'), user license ('Salesforce'), and creation details ('Created By: salesforce.com, inc., 01/10/2023, 6:39 am'). Below this is the 'Page Layouts' section, which lists various standard object layouts for the 'Standard User' profile. The 'Global' layout is selected for most objects, while 'Not Assigned' is selected for 'Email Application' and 'Home Page Layout'. The 'Object Milestone' layout is selected for 'Opportunity Product' and 'Payment' objects.

## 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...

The screenshot shows the 'Profile Edit' screen for a user profile named 'Store Supervisor'. The profile is associated with the 'Salesforce' user license and is set to a 'Custom Profile'. The 'Custom App Settings' section lists various standard and custom apps, each with 'Visible' and 'Default' checkboxes. Most apps have their 'Visible' checkbox checked, except for 'Salesforce Scheduler Setup' which is unchecked. The 'Sales' app is selected, showing its specific settings. The 'Required Information' indicator (a red exclamation mark) is present next to the 'Name' field.

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__AltTabSet)	<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__DX)	<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__RevenueCloudConsole)	<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"/>

Required Information

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...

The screenshot shows the 'Profile Edit' screen for a user profile named 'Store Supervisor'. The profile is associated with the 'Salesforce' user license and is set to a 'Custom Profile'. The 'Custom Object Permissions' section lists various custom objects with checkboxes for 'Basic Access' (Read, Create, Edit, Delete) and 'Data Administration' (View All, Modify All). The 'Work Types' object has all permissions checked. The 'Session Settings' section is visible at the bottom.

Search Setup

Setup Home Object Manager

Profiles

Custom Object Permissions

	Basic Access				Data Administration	
	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"/>
Favourites	<input checked="" type="checkbox"/>					
Fragrance products	<input type="checkbox"/>					
Inventories	<input type="checkbox"/>					
Others	<input type="checkbox"/>					

	Basic Access				Data Administration	
	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"/>					

Session Settings

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 for creating roles. On the left, the navigation sidebar is open with 'Users' selected, and 'Roles' is highlighted under it. The main content area is titled 'Understanding Roles' with a sub-section 'Sample Role Hierarchy'. A diagram illustrates a hierarchy from 'Executive Staff' down to 'Western Sales Rep'. The 'Executive Staff' level includes 'CEO President' and 'CFO VP, Sales'. The 'Western Sales Director' level includes 'Western Sales Director' and 'Eastern Sales Director'. The 'International Sales Director' level includes 'International Sales Director'. The 'Western Sales Rep' level includes 'Western Sales Rep', 'CA Sales Rep', 'OR Sales Rep', and 'NY Sales Rep', 'MA Sales Rep'. The 'International Sales Rep' level includes 'Asian Sales Rep' and 'European Sales Rep'. Arrows indicate the reporting relationships between these roles. A legend on the right explains the permissions: 'View & edit data, roll up forecasts, & generate reports for all users below' (for Executive Staff), 'View & edit data, roll up forecasts, & generate reports for users directly below' (for Directors), and 'View & edit data, roll up forecasts, & generate reports for users above or at same level' (for Sales Reps). A 'Setup Roles' button is at the bottom right of the content area.

The screenshot shows the 'Role Edit' page for a role named 'Store Head'. The 'Label' field contains 'Store Head', the 'Role Name' field contains 'Store\_Head', and the 'This role reports to' field contains 'CEO'. The 'Role Name as displayed on reports' field is empty. At the bottom of the page are 'Save', 'Save & New', and 'Cancel' buttons. The left sidebar shows the 'Users' section with 'Roles' selected. The bottom of the screen shows the standard Salesforce navigation bar with tabs like Home, Object Manager, and a search bar.

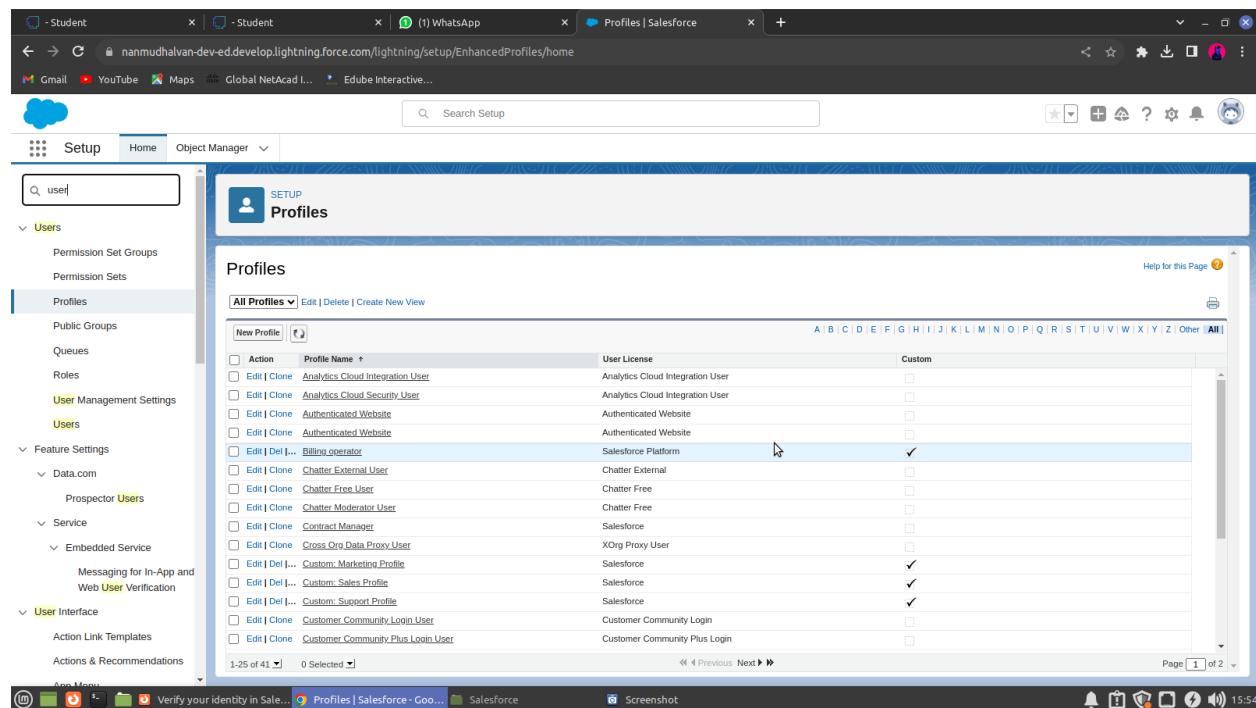
The screenshot shows the Salesforce Setup interface with the 'Roles' page selected. On the left, a sidebar lists 'Sales' and 'Service' features under 'Feature Settings'. The main area displays the 'Role Edit' screen for the 'Billing Operator' role. The 'Label' field contains 'Billing Operator', the 'Role 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' features 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

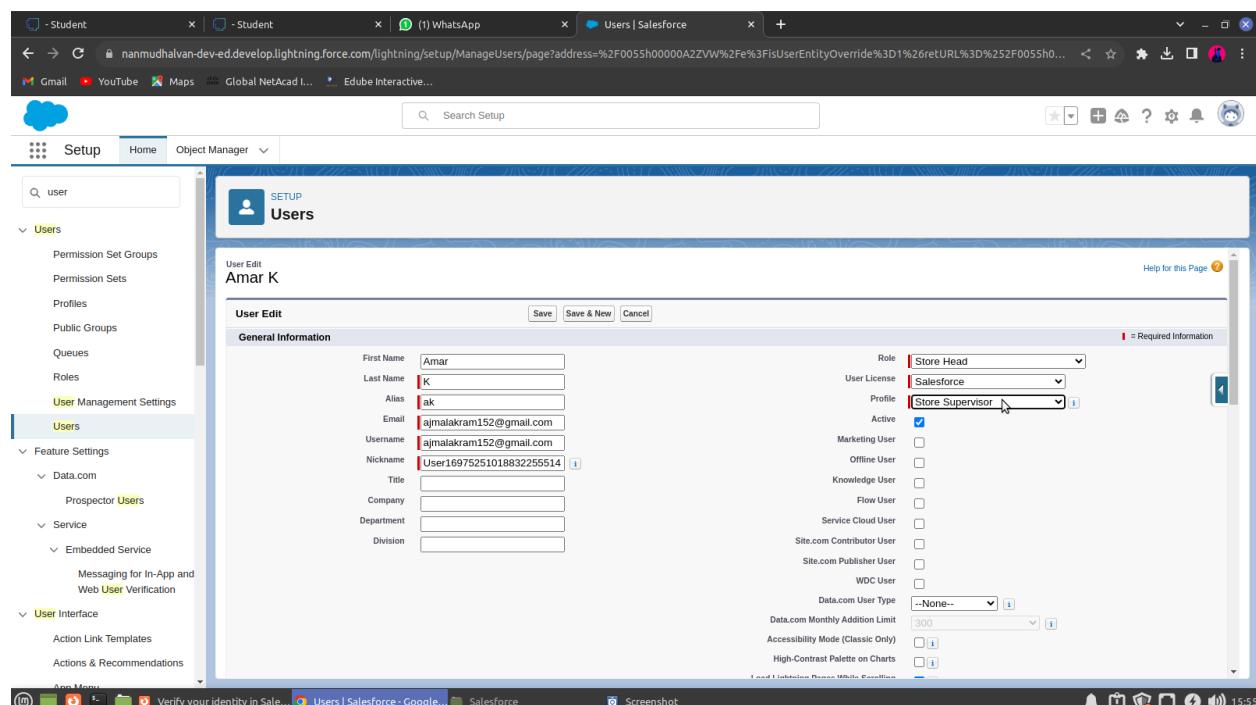
A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account.

#### Creating A Users



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 first few rows visible:

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit   Clone	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/> Edit   Del ...	Billing operator	Salesforce Platform	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Chatter External User	Chatter External	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Chatter Free User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Contract Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Cross Org Data Proxy User	XOrg Proxy User	<input type="checkbox"/>
<input type="checkbox"/> Edit   Del ...	Custom: Marketing Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Del ...	Custom: Sales Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Del ...	Custom: Support Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Customer Community Login User	Customer Community Login	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Customer Community Plus Login User	Customer Community Plus Login	<input type="checkbox"/>



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 displays the 'User Edit' form for a user named 'Amar K'. The 'General Information' tab is selected, showing fields for First Name (Amar), Last Name (K), Alias (ak), Email (ajmalakram152@gmail.com), Username (ajmalakram152@gmail.com), Nickname (User16975251018832255514), Title, Company, Department, and Division. On the right side, there are dropdown menus for Role (Store Head), User License (Salesforce), Profile (Store Supervisor), and Active status (checked). Other optional settings 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 (None), Data.com Monthly Addition Limit (300), Accessibility Mode (Classic Only), and High-Contrast Palette on Charts.

## Creating another Users

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. On the left, a sidebar lists various user management settings 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 (psychoju1730@gmail.com), Username (psychoju1730@gmail.com), and Nickname (User16975253526783768537). To the right, there are sections for 'Role' (Billing Operator), 'User License' (Salesforce Platform), 'Profile' (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, and WDC User. A note indicates that Data.com User Type is set to 'None'. The bottom of the screen shows standard save buttons (Save, Save & New, Cancel) and a help link.

This screenshot shows the same Salesforce Setup interface as the previous one, but the user information has been cleared or is being edited. The 'General Information' section is now empty. 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 generating a new password. The bottom of the screen shows standard save buttons (Save, Save & New, Cancel) and a help link.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Akram, Amal	Amra	amalakram152@salesforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Chatter Expert	Chatter	chatty20df90000008ny47eac_0c5euzbke0t@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	K. Amal	ak	amalakram152@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

The screenshot shows the Salesforce Lightning Experience. A new customer record is being created in the 'our\_customers' object. The 'Information' section contains fields for 'our\_customer\_name' (ajay), 'customer\_name' (aju), 'customer\_mail' (ajay@mail.com), and 'customer\_number' (789456132). The 'Feedback' field has the value 'good'. The 'Owner' is listed as Ajmal Akram. The 'Inventory' section includes a search bar for inventories. At the bottom right of the form, there are buttons for 'Cancel', 'Save & New', and a blue 'Save' button.

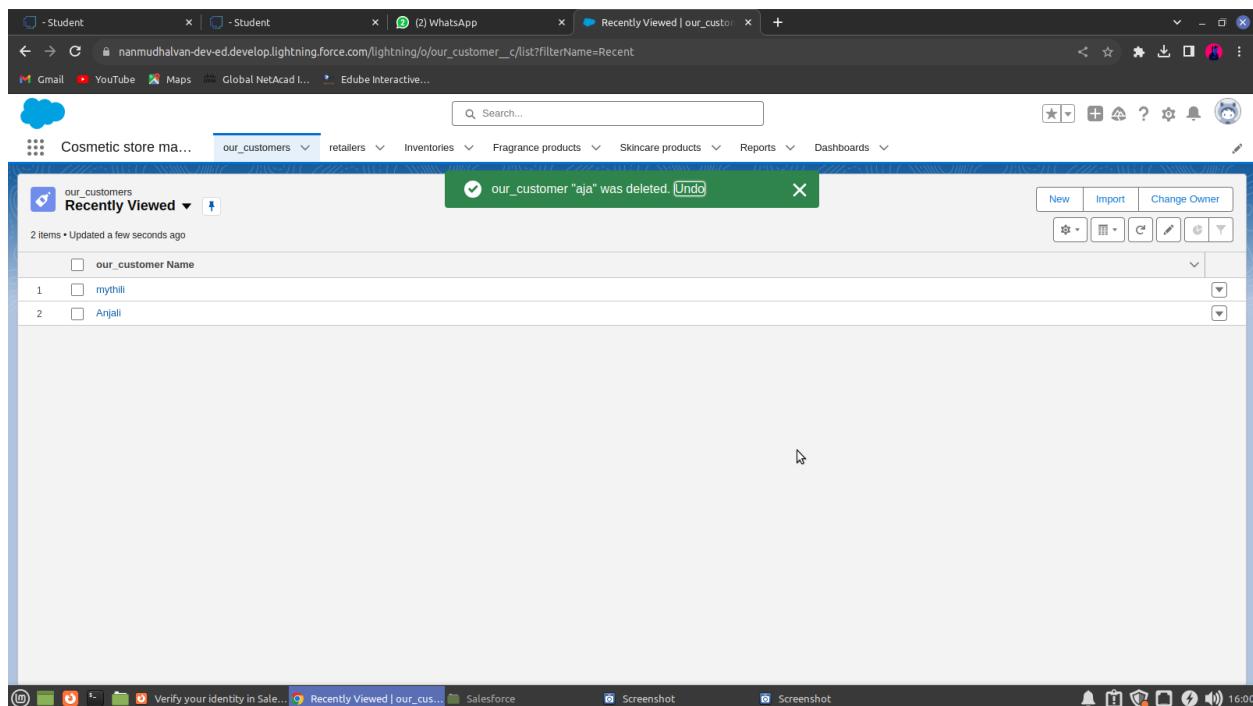
## View Record (Our Customer)

The screenshot shows the Salesforce Lightning Experience with a list view of customer records. The 'Recently Viewed' section shows three items: 'ajay', 'mythili', and 'Anjali'. The top navigation bar includes links for 'Retailers', 'Inventories', 'Fragrance products', 'Skincare products', 'Reports', and 'Dashboards'. The bottom navigation bar includes links for 'Verify your identity in Sale...', 'Screenshot', and 'Screenshot'.

The screenshot shows a Salesforce Lightning page for a customer named 'aja'. The top navigation bar includes tabs for 'Student', 'Student', 'WhatsApp', and 'aja | our\_customer | Salesforce'. The main header has a search bar and various icons. The page title is 'Cosmetic store ma... our\_customers'. The left sidebar shows related objects like 'retailers', 'Inventories', 'Fragrance products', 'Skincare products', 'Reports', and 'Dashboards'. The main content area displays the customer details for 'aja', including Name, Owner (Ajmal Akram), and various fields like customer\_name, customer\_email, and customer\_number. The 'Activity' section is visible on the right, showing no upcoming or overdue activities. The bottom status bar shows system icons and the time as 15:59.

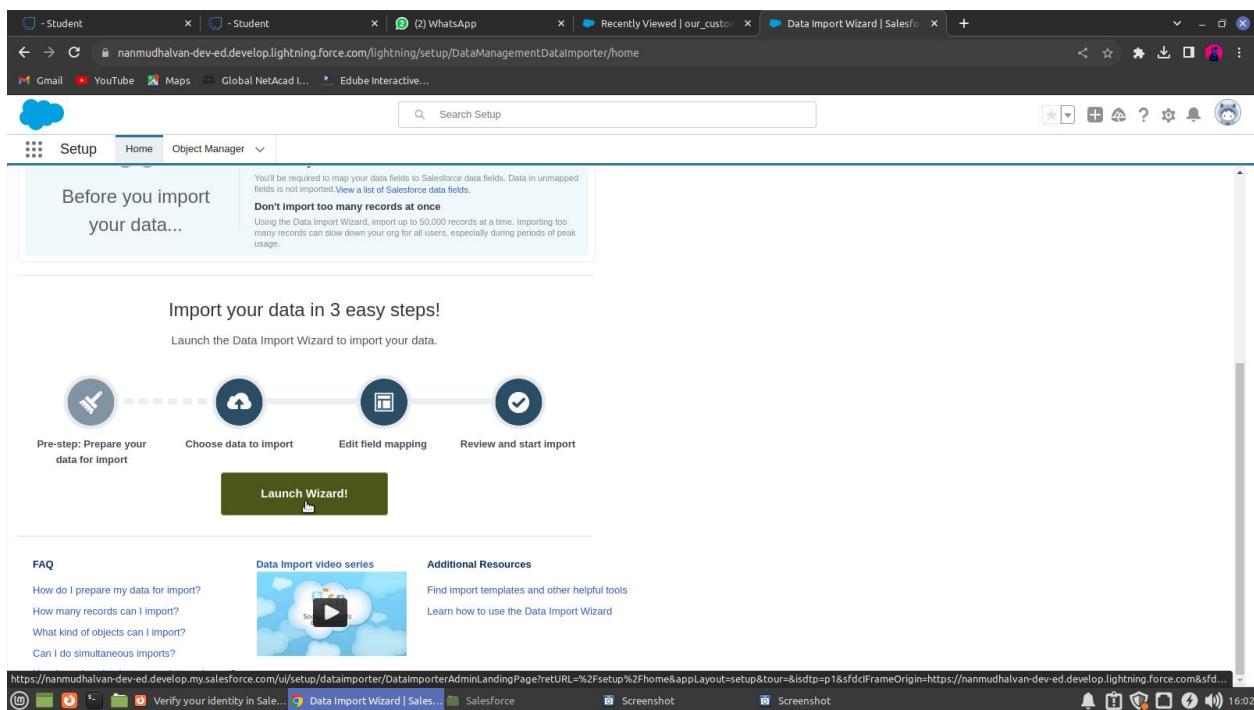
## Delete Record (Our Customer)

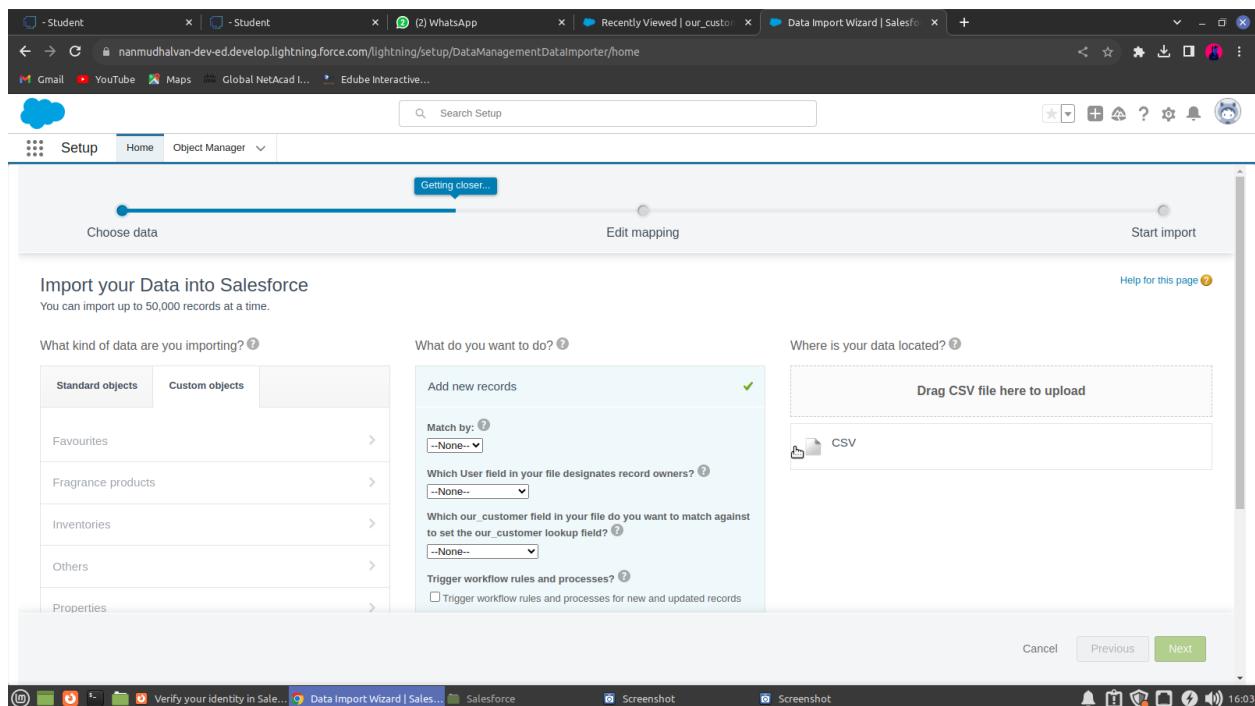
The screenshot shows a Salesforce Lightning page for managing recently viewed customers. The top navigation bar includes tabs for 'Student', 'Student', 'WhatsApp', and 'Recently Viewed | our\_customer | Salesforce'. The main header has a search bar and various icons. The page title is 'Cosmetic store ma... our\_customers'. The left sidebar shows related objects like 'retailers', 'Inventories', 'Fragrance products', 'Skincare products', 'Reports', and 'Dashboards'. The main content area displays a list of recently viewed customers: 'aja', 'mythili', and 'Anjali'. A modal window titled 'Delete our\_customer' is open, asking 'Are you sure you want to delete this our\_customer?'. The modal has 'Cancel' and 'Delete' buttons. The bottom status bar shows system icons and the time as 16:00.



## Data Import

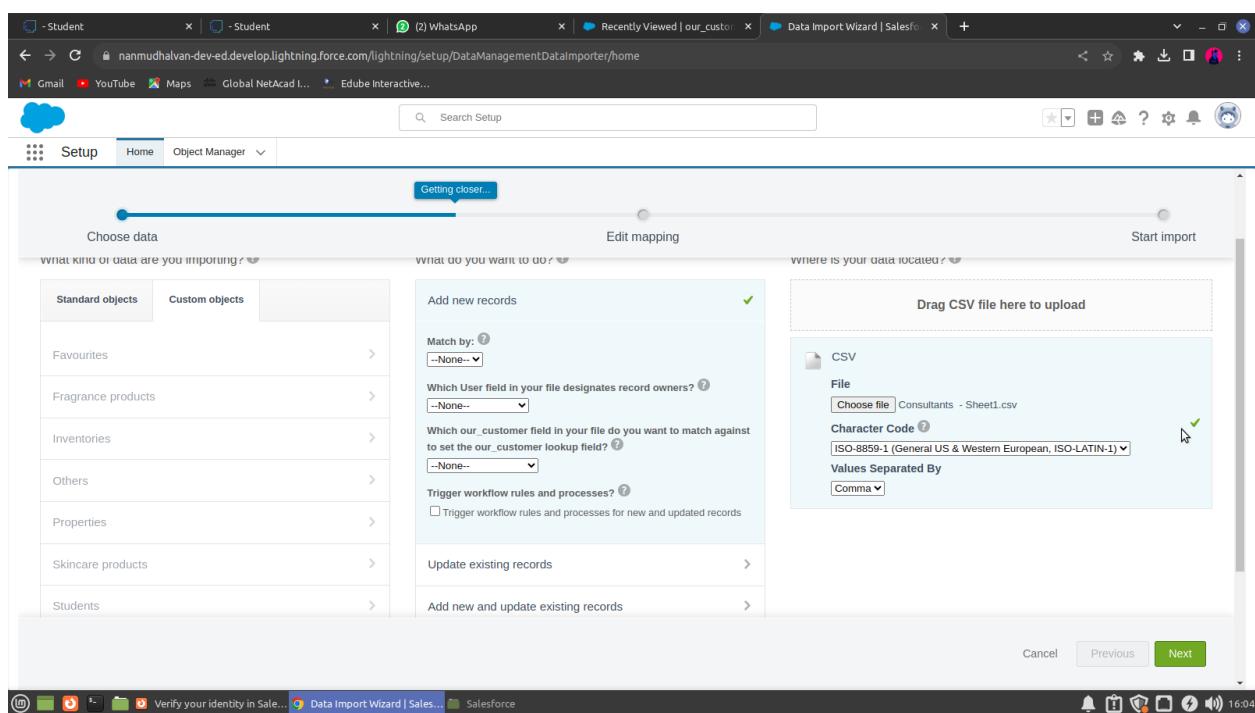
The Data Import Wizard is one of various tools available to Salesforce users for importing data. The tool is best used when importing data into the Account, Contact, Lead, or Solution objects along with any custom objects within your Salesforce organization





Downloading it via :

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



Student - Student | (2) WhatsApp | Recently Viewed | our\_customers | Data Import Wizard | Salesforce

Search Setup

Setup Home Object Manager

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

Student - Student | (2) WhatsApp | Recently Viewed | our\_customers | Data Import Wizard | Salesforce

Search Setup

Setup Home Object Manager

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:

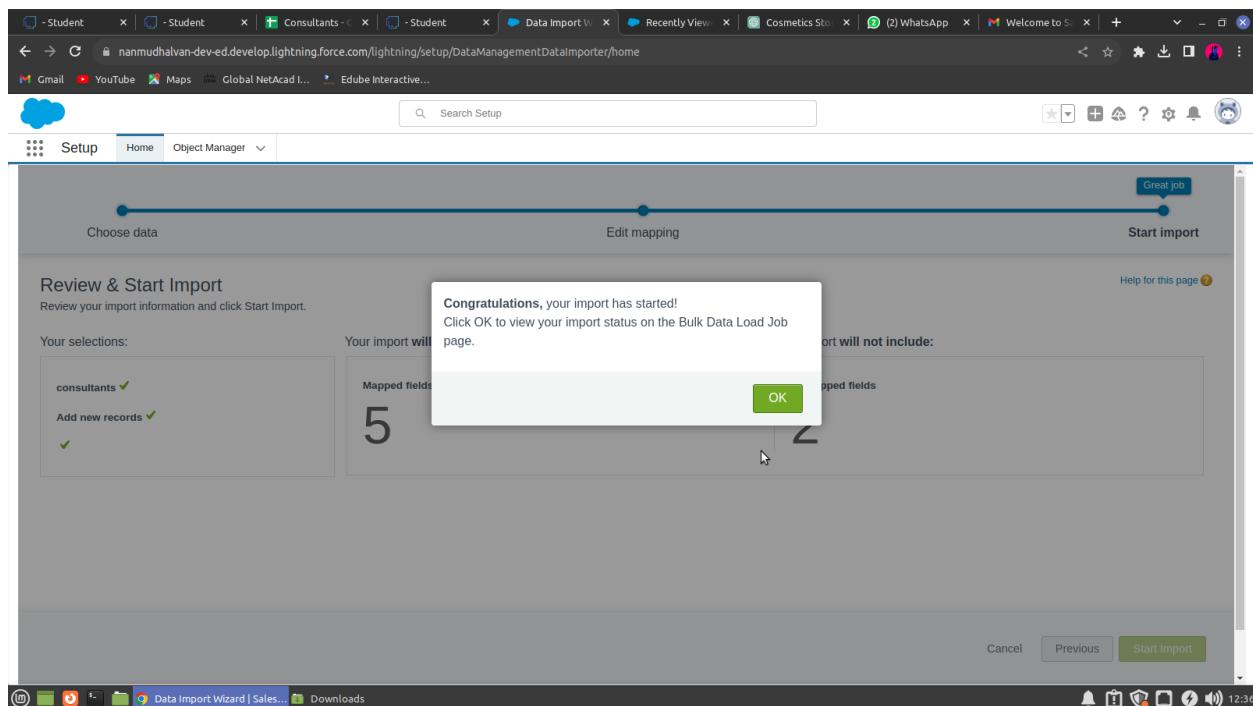
Mapped fields: 5

Unmapped fields: 2

Your import will not include:

Cancel Previous Start Import

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



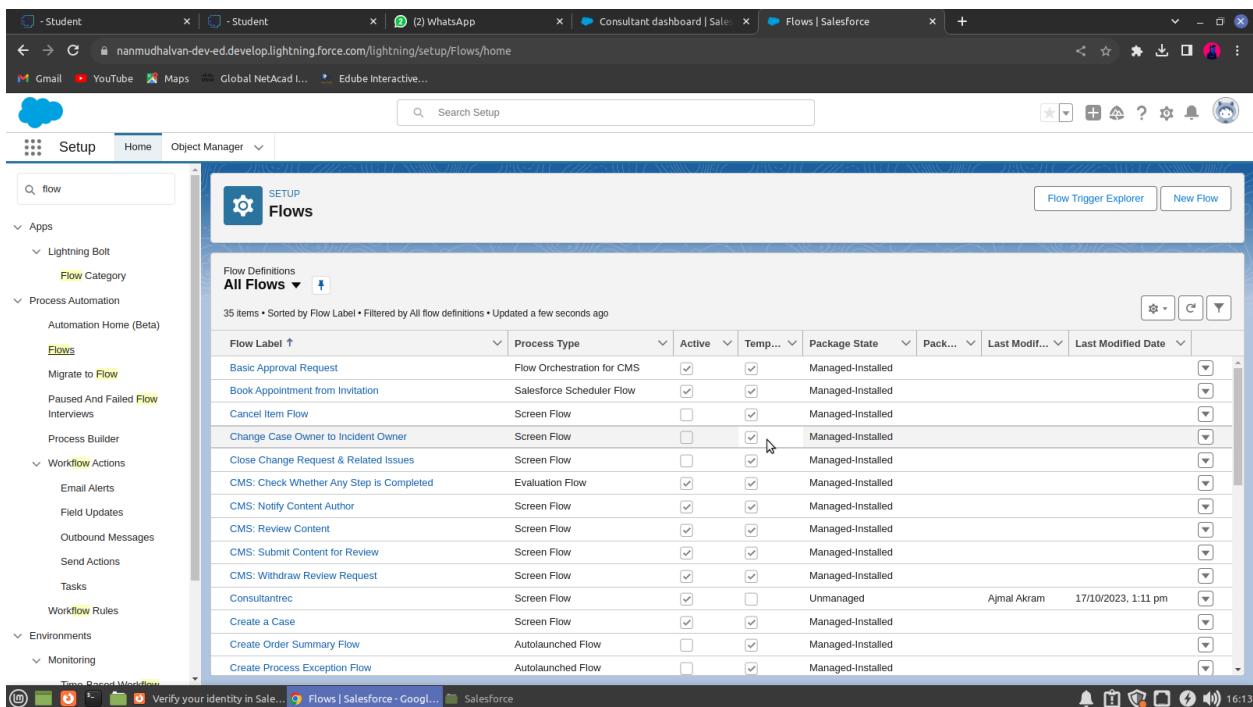
View Request	View Result	Batch ID	Start Time	End Time	Total Processing Time (ms)	API Active Processing Time (ms)	Apex Processing Time (ms)	Records Processed	Records Failed	Retry Count	State Message	Status
View Request	View Result	7515h00000WtABU	17/10/2023, 4:04 pm	17/10/2023, 4:04 pm	92	48	0	9	3	0	Completed	

# CHAPTER-4

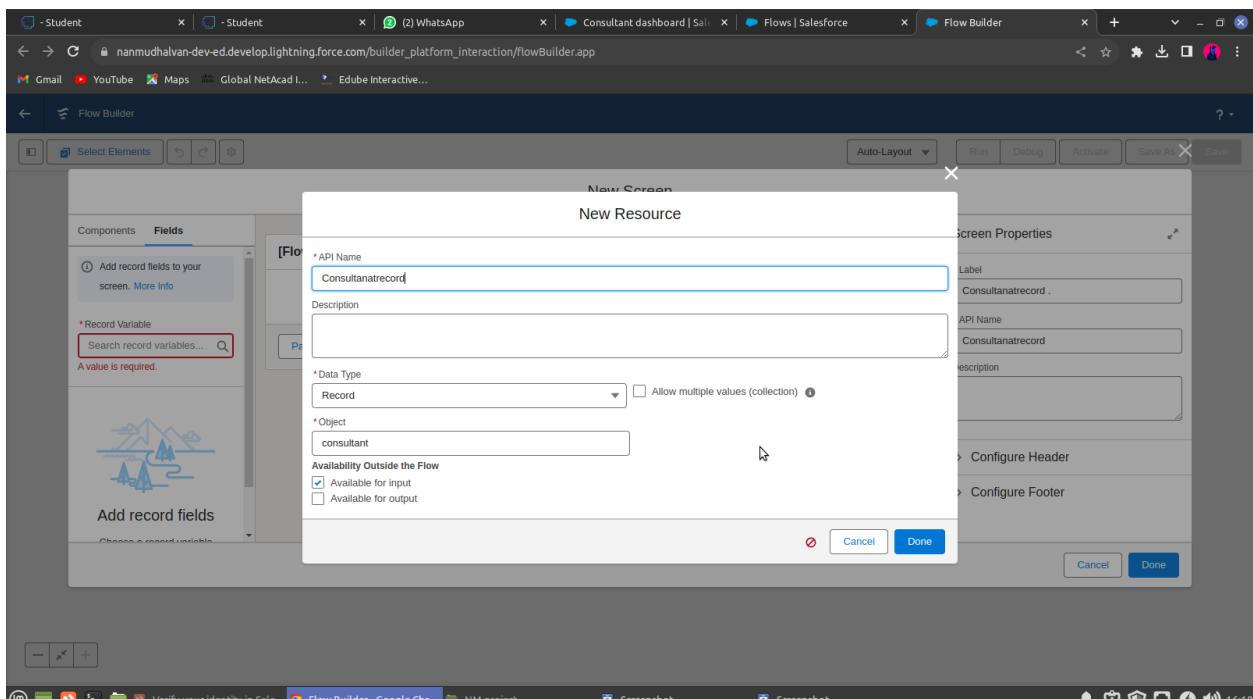
## AUTOMATION

### 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. On the left, a sidebar navigation includes 'Apps', 'Lightning Bolt', 'Process Automation' (with 'Automation Home (Beta)', 'Flows', 'Migrate to Flow', 'Paused And Failed Flow', 'Interviews', 'Process Builder', 'Workflow Actions', 'Email Alerts', 'Field Updates', 'Outbound Messages', 'Send Actions', 'Tasks', 'Workflow Rules', 'Environments', and 'Monitoring'), and 'Time Based Workflow'. The main area displays a table titled 'Flow Definitions' with a 'All Flows' dropdown. The table lists 35 items, including flows like 'Basic Approval Request', 'Book Appointment from Invitation', and various CMS-related flows. The columns include 'Flow Label', 'Process Type', 'Active', 'Temp...', 'Package State', 'Pack...', 'Last Modif...', 'Last Modified Date', and a 'Details' button. A cursor is visible over the 'Change Case Owner to Incident Owner' row.



This screenshot shows the 'Flow Builder' interface. A modal window titled 'New Resource' is open, prompting for an 'API Name' (set to 'Consultantaterecord'), 'Description' (empty), 'Data Type' (set to 'Record'), and 'Object' (set to 'consultant'). Under 'Availability Outside the Flow', the 'Available for input' checkbox is checked. The 'Screen Properties' panel on the right shows 'Label' (set to 'Consultantaterecord'), 'API Name' (set to 'Consultantaterecord'), and 'description' (empty). Buttons at the bottom of the modal include 'Cancel' and 'Done'. The background shows the Flow Builder canvas with various components and fields.

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

Consultantrec - V1

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 Version 1: Active—Last modified a few seconds ago 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 tabs: Student, Student, WhatsApp, Reports | Salesforce, and Home | Salesforce. Below the tabs, the page title is "Cosmetic store ma...". A navigation bar includes links for our\_customers, retailers, Inventories, Fragrance products, Skincare products, Reports, and Dashboards. On the left, a sidebar titled "Reports" lists "Recent" reports, with one item: "New consultants Report" (Created by Me, Private Reports, Ajmal Akram, 17/10/2023, 12:49 pm). The main content area displays the report details.

The screenshot shows the Salesforce Report Builder page. At the top, there are several tabs: Student, Student, WhatsApp, Report Builder | Salesforce, and Home | Salesforce. Below the tabs, the page title is "Cosmetic store ma...". A navigation bar includes links for our\_customers, retailers, Inventories, Fragrance products, Skincare products, Reports, and Dashboards. The main content area is titled "Create Report". It features a sidebar with "Recently Used" categories like Accounts & Contacts, Opportunities, and Leads. The central area shows a "Select a Report Type" section with a search bar and a table of "Recently Used Report Types". The table has columns for "Report Type Name" and "Category", showing one entry: "consultants" under "Standard". To the right, a "Details" panel is open, showing report information such as "consultants" (Standard Report Type), "Start Report" button, and sections for "Created By You" (with "New consultants Report") and "Created By Others" (No Reports Yet). Another section, "Objects Used in Report Type", lists "Owner" and "Consultant".

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 row (index 13), 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 a bucket named 'Payment'. The 'Field' dropdown is set to 'Payment'. The 'Bucket Name' field is empty.

The 'All Values (4)' section contains three entries: 'NetBank (3)' and 'Cash (1)'. The 'Unbucketed Values (0)' section is empty.

The 'Search Values' table lists the following buckets:

VALUE	BUCKET
Cash	Cash
NetBank	NetBank
NetBank	NetBank
NetBank	NetBank

At the bottom of the dialog are 'Cancel' and 'Apply' buttons.

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 a bucket named 'Payment'. The 'Field' dropdown is set to 'Payment'. The 'Bucket Name' field is empty.

The 'All Values (4)' section contains three entries: 'NetBank (3)' and 'Cash (1)'. The 'Unbucketed Values (0)' section is empty.

The 'Search Values' table lists the following buckets:

VALUE	BUCKET
Credit card	NetBank
Debit card	NetBank
UPI	NetBank
Cash	Cash
NetBank	NetBank
NetBank	NetBank

At the bottom of the dialog are 'Cancel' and 'Apply' buttons.

Screenshot of a Salesforce report titled "New consultants Report". The report displays data for 12 records across three categories: NetBanking, Cash, and Subtotal. The columns include Payment type, consultant: consultant Name, Delivery type, and products.

	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		
<b>Subtotal</b>				
Cash (4)	Dev Raj	Self pickup	Lipstick	
	Shankar	Self pickup	Face pack	
	Dev Raj	Self pickup	Lipstick	
	Shankar	Self pickup	Face pack	
<b>Subtotal</b>				
<b>Total (12)</b>				

Row Counts: 8, Detail Rows: checked, Subtotals: checked, Grand Total: checked.

## View Report

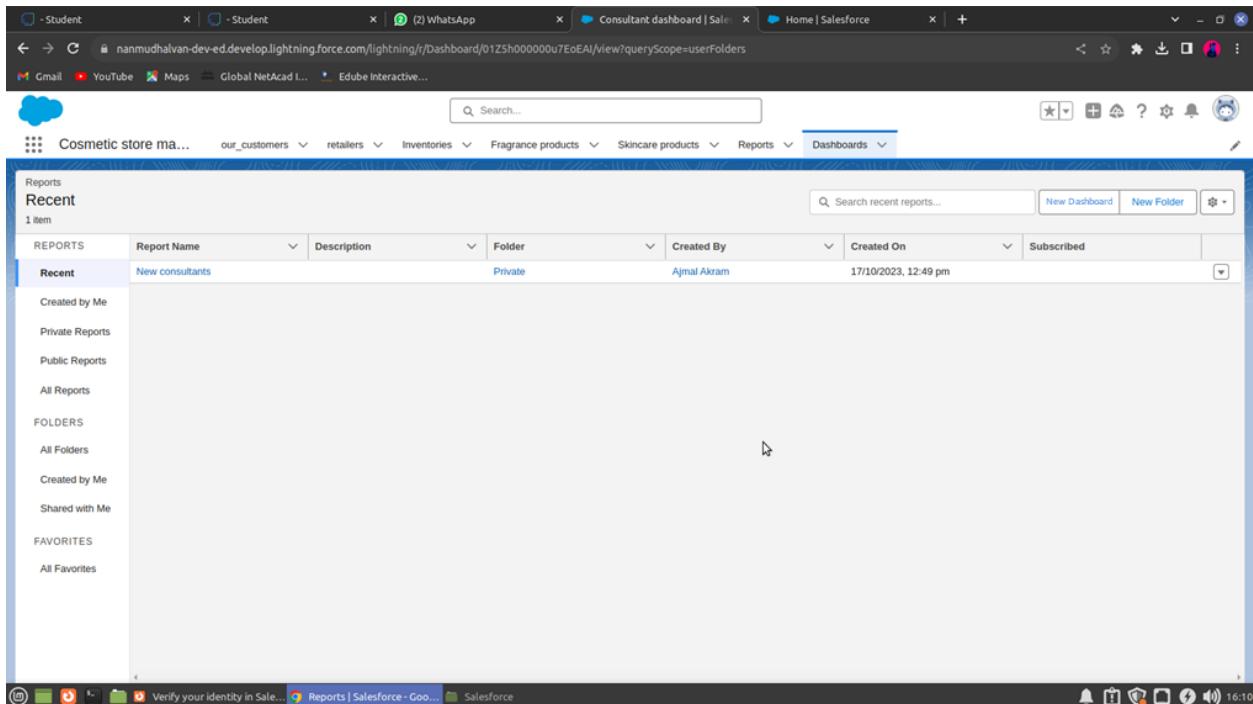
Screenshot of the Salesforce Reports page showing the "Recent" section. A single report titled "New consultants Report" is listed under the "Recent" category. The report details are: Report Name - New consultants Report, Description - Private Reports, Created By - Ajmal Akram, Created On - 17/10/2023, 12:49 pm, and Subscribed - checked.

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

Left sidebar navigation includes: Reports, Recent, 1 item, Created by Me, Private Reports, Public Reports, All Reports, FOLDERS, All Folders, Created by Me, Shared with Me, FAVORITES, All Favorites.

## 5.2 Dashboard

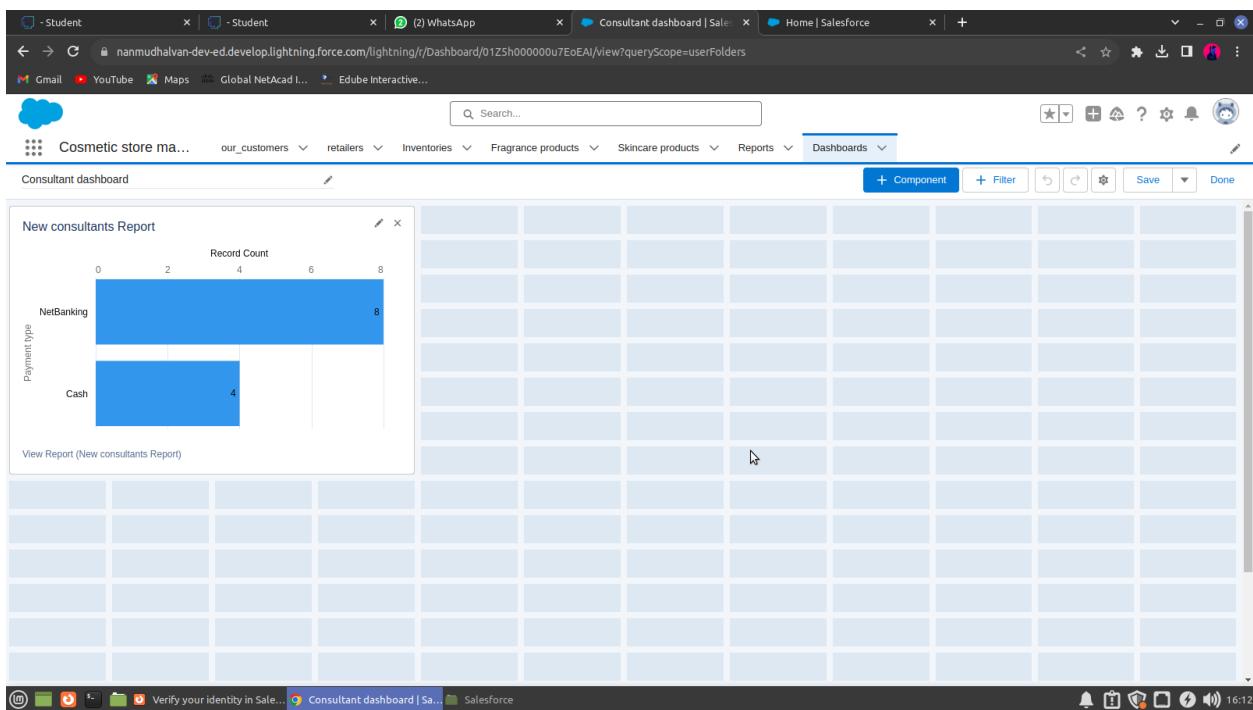
A dashboard provides an interactive visual display of key metrics and trends. Multiple dashboard components can be shown together on a single dashboard layout, creating rich visual displays of multiple reports that have a common theme.



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 "Verify your identity in Sale..." message.



The screenshot shows the 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 "New consultants Report" component and a large empty grid.

The "New consultants Report" component includes a chart titled "Record Count" showing the count of records for "NetBanking" (8) and "Cash" (4). Below the chart, there is a link "View Report (New consultants Report)".

At the top right of the dashboard area, there is a toolbar with buttons for "+ Component", "+ Filter", "Save", and "Done". At the bottom of the page, there is a toolbar with icons for Report, Filter, Save, and Done, along with a "Verify your identity in Sale..." message.

Consultant dashboard | Sales

New consultants Report

Payment type	Record Count
NetBanking	8
Cash	4

View Report (New consultants Report)

Dashboard saved

+ Component + Filter Save Done

16:13

## View Dashboard

Consultant dashboard | Sales

Dashboard

As of 17-Oct-2023, 4:12 pm-Viewing as Ajmal Akram

New consultants Report

Payment type	Record Count
NetBanking	8
Cash	4

View Report (New consultants Report)

Refresh Edit Subscribe

16:13

## **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/pavithra2k2/pavithra2k2.git>

**Demo Link:**

[https://drive.google.com/file/d/1gFeH-PcOGzT1udV2JPoMrqMCBc4yx\\_zk/view?usp=drivesdk](https://drive.google.com/file/d/1gFeH-PcOGzT1udV2JPoMrqMCBc4yx_zk/view?usp=drivesdk)