

Property Management Application using Salesforce



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PROJECT REPORT

Submitted by

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in
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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 (620120104093)**” 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

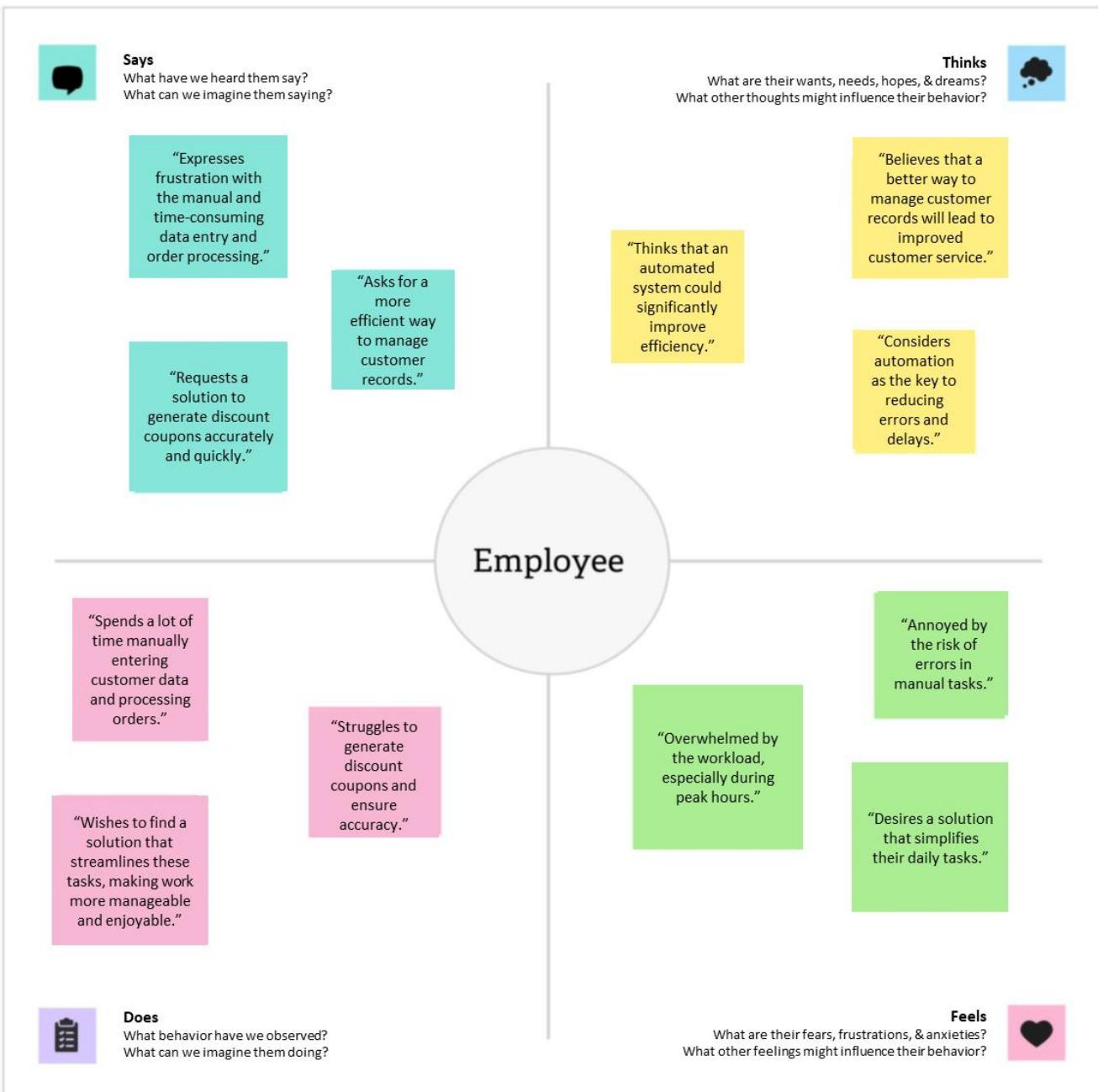
Problem for	Trying to	But	Which makes
Employee	I'm working in a cosmetics store, and I'm trying to efficiently manage customer records, process orders, and generate discount coupons for various types of employees.	But the manual and time-consuming nature of these tasks, along with the risk of errors.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

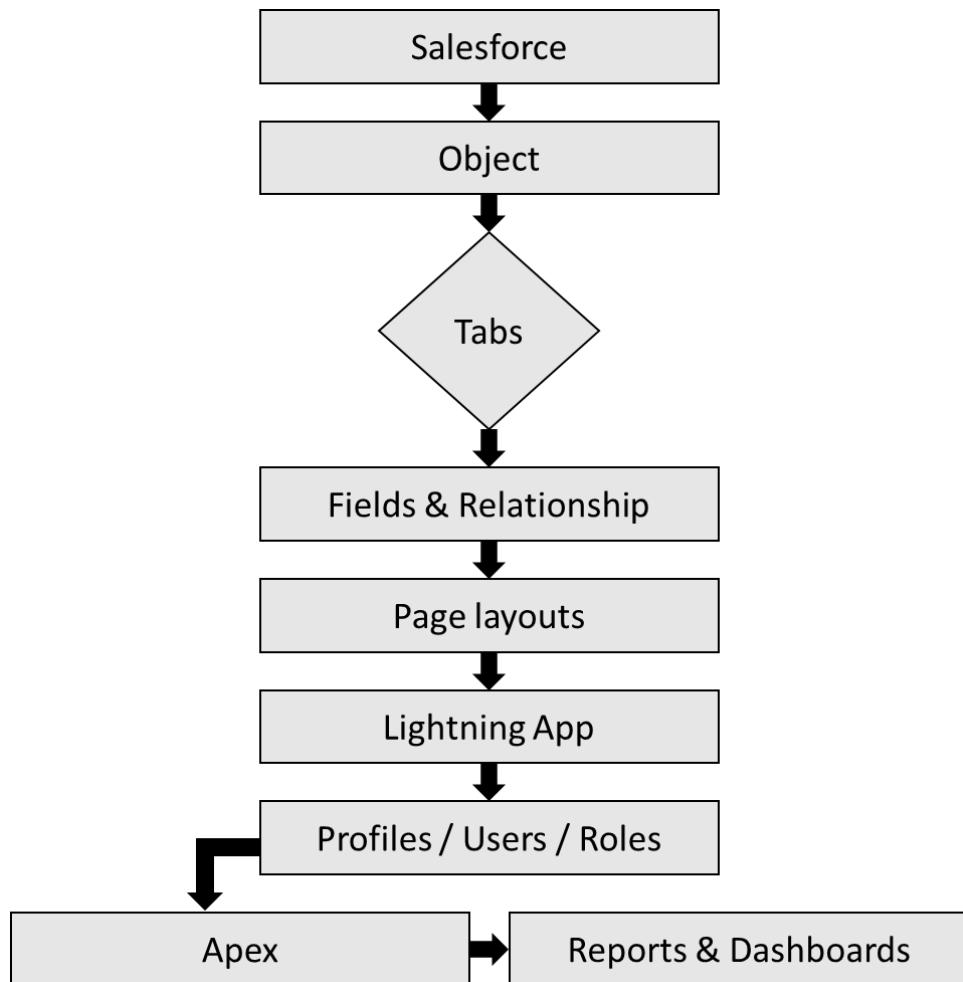
Requirement	Description
Salesforce Developer Org	Create a Salesforce developer org for project development and testing.
Lightning App	Create a Lightning app to brand the application and provide a customized color scheme and logo.
Automation Tools	Use Apex triggers and flows to implement automation in 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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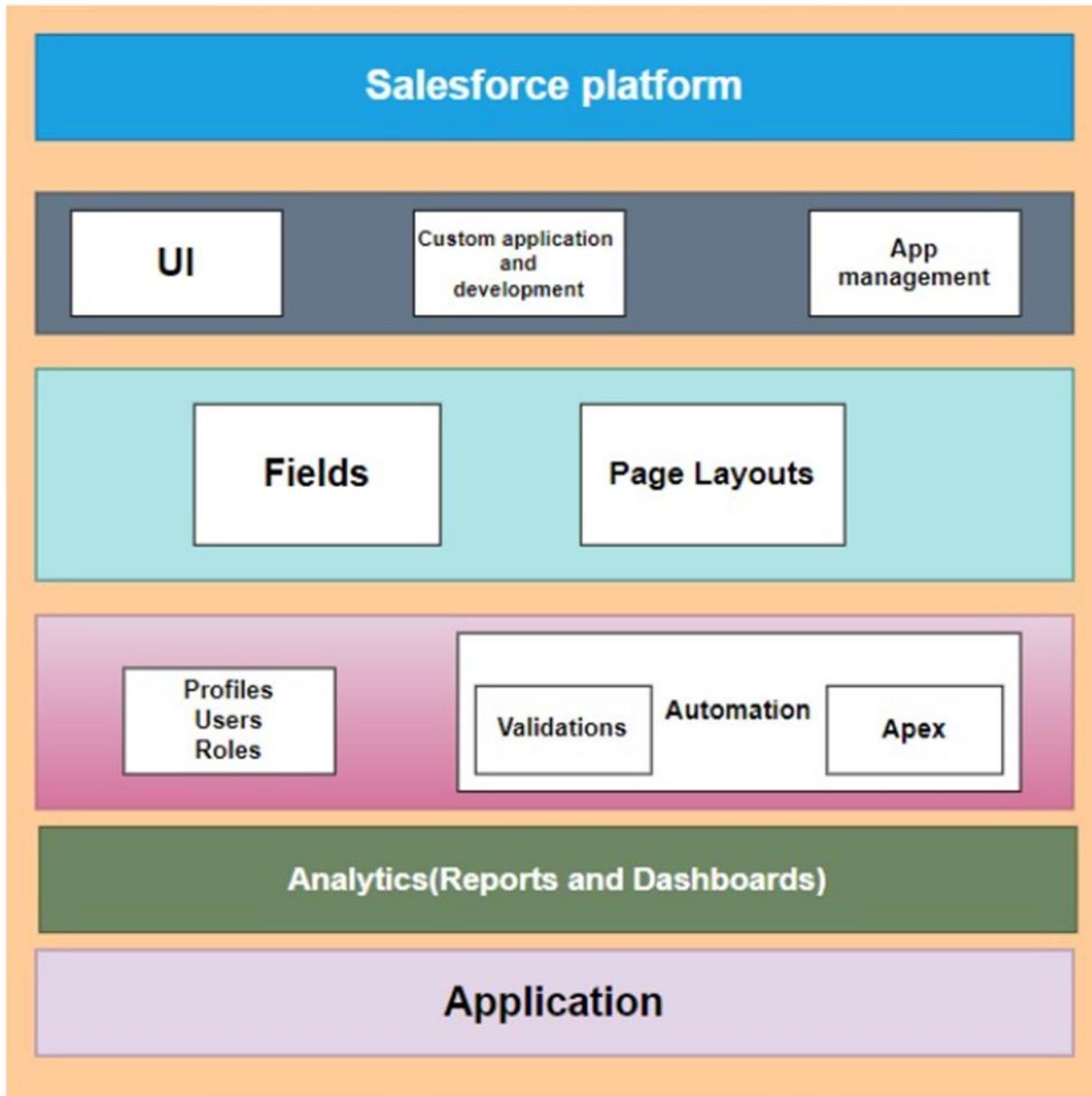
1.7 Project Road Map

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

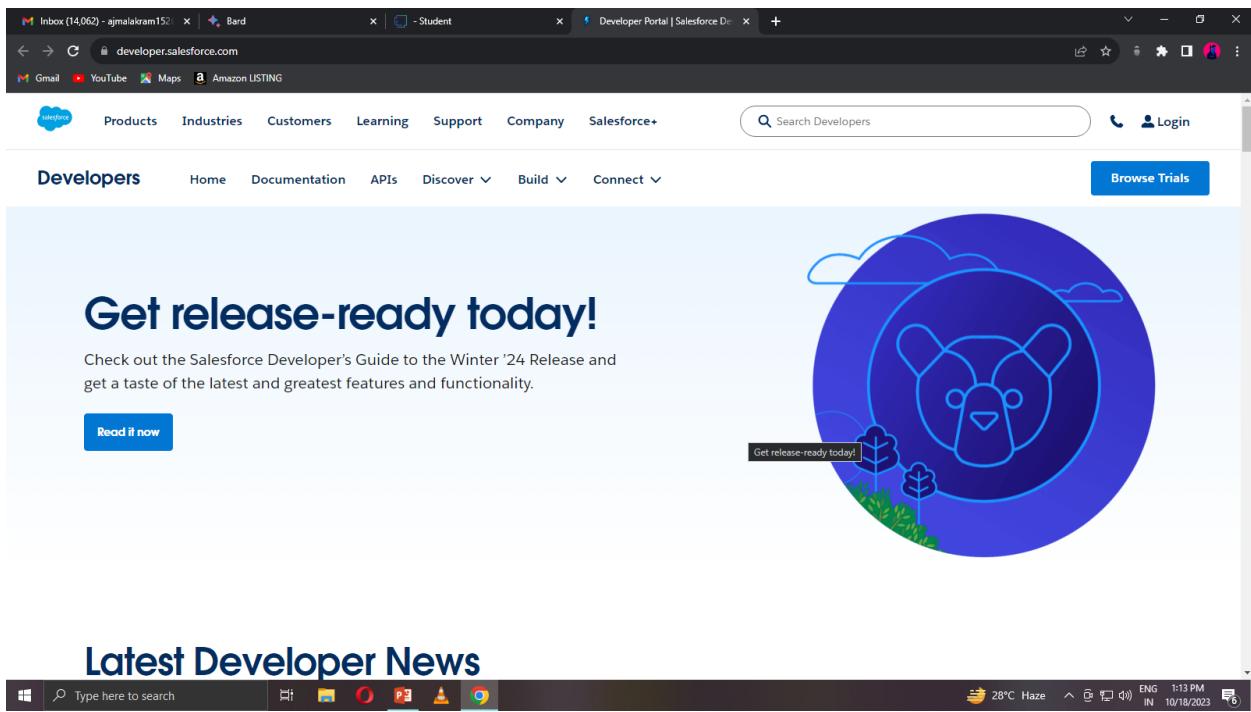


CHAPTER-2

PREPARATION DATA MODELING

2.1 Salesforce Developer Org

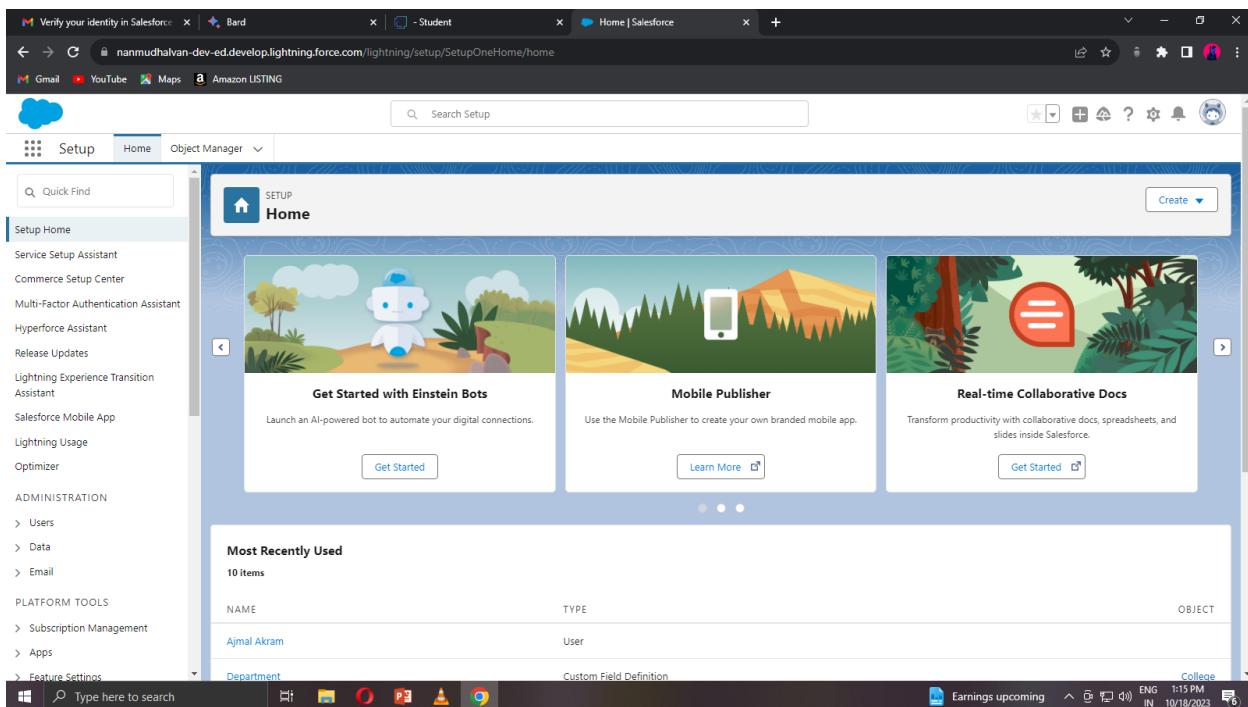
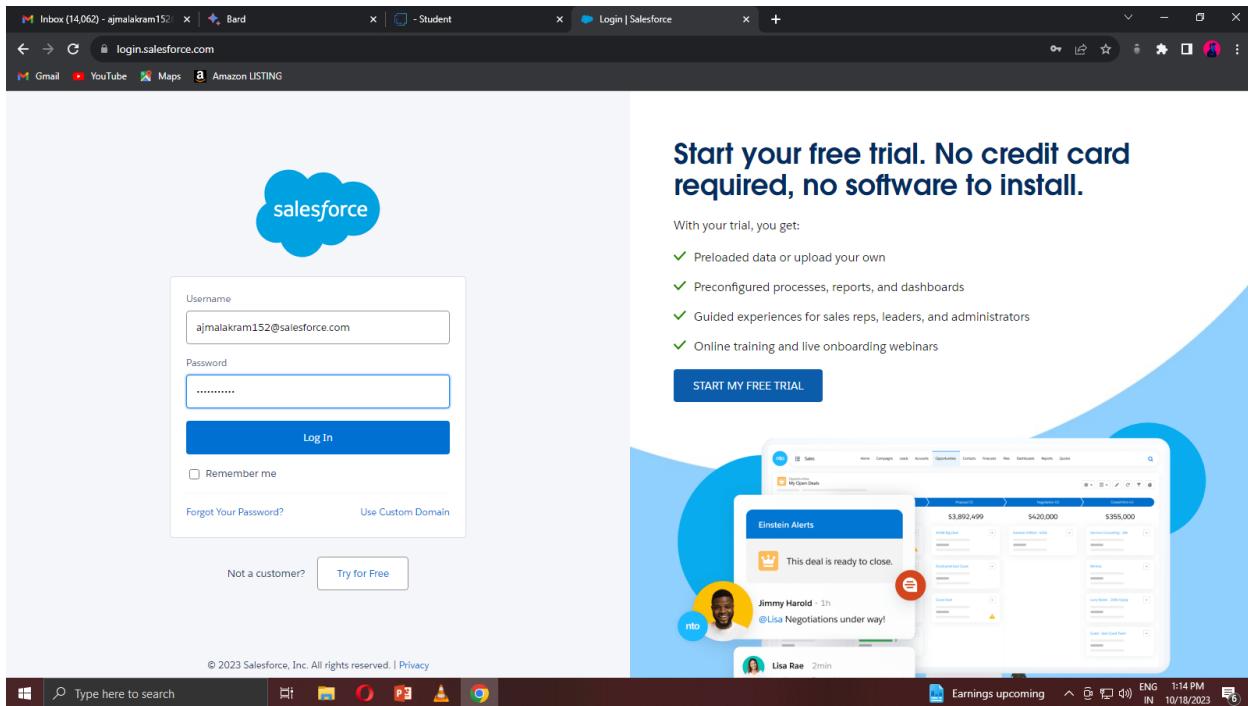
In Salesforce, a Developer Sign Up or Developer Edition is a special type of Salesforce environment that is primarily used for development, testing, and



learning purposes.

Account Activation

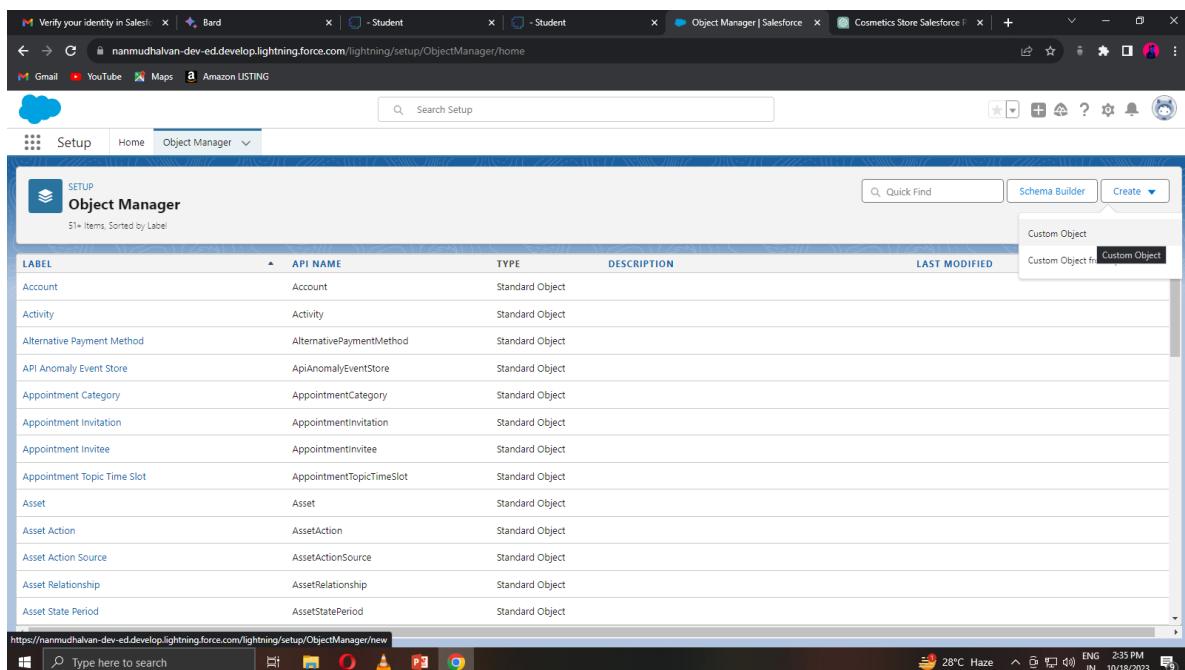
Activation tracks information about devices from which users have verified their identity.



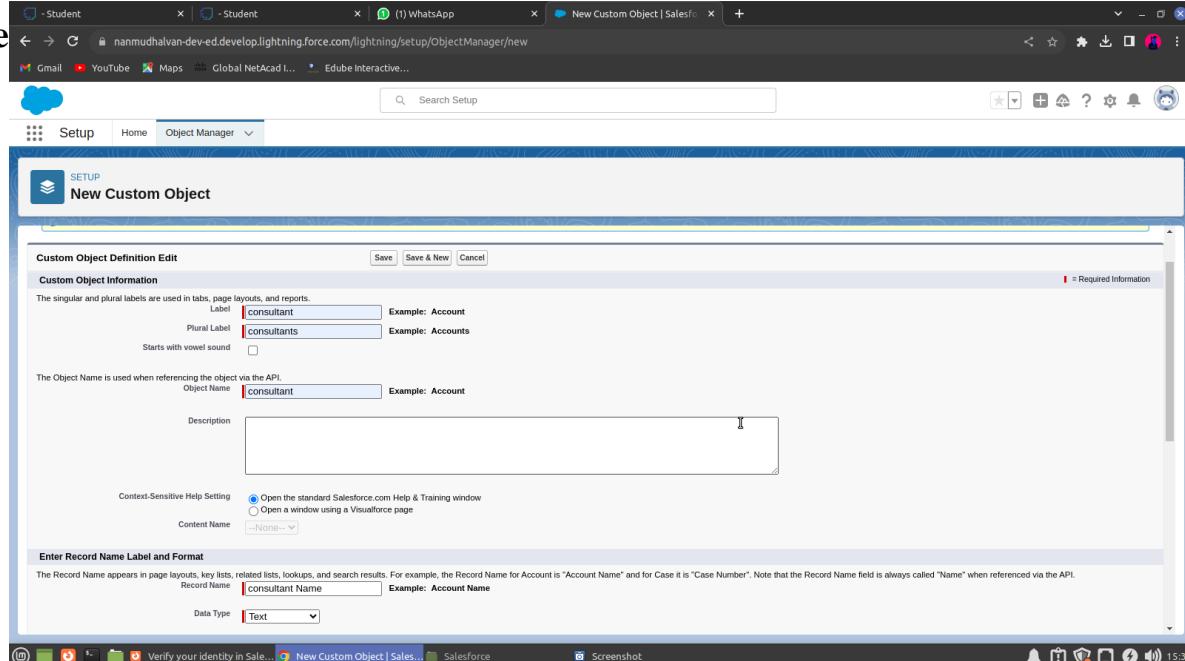
2.2 Object Creation

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.

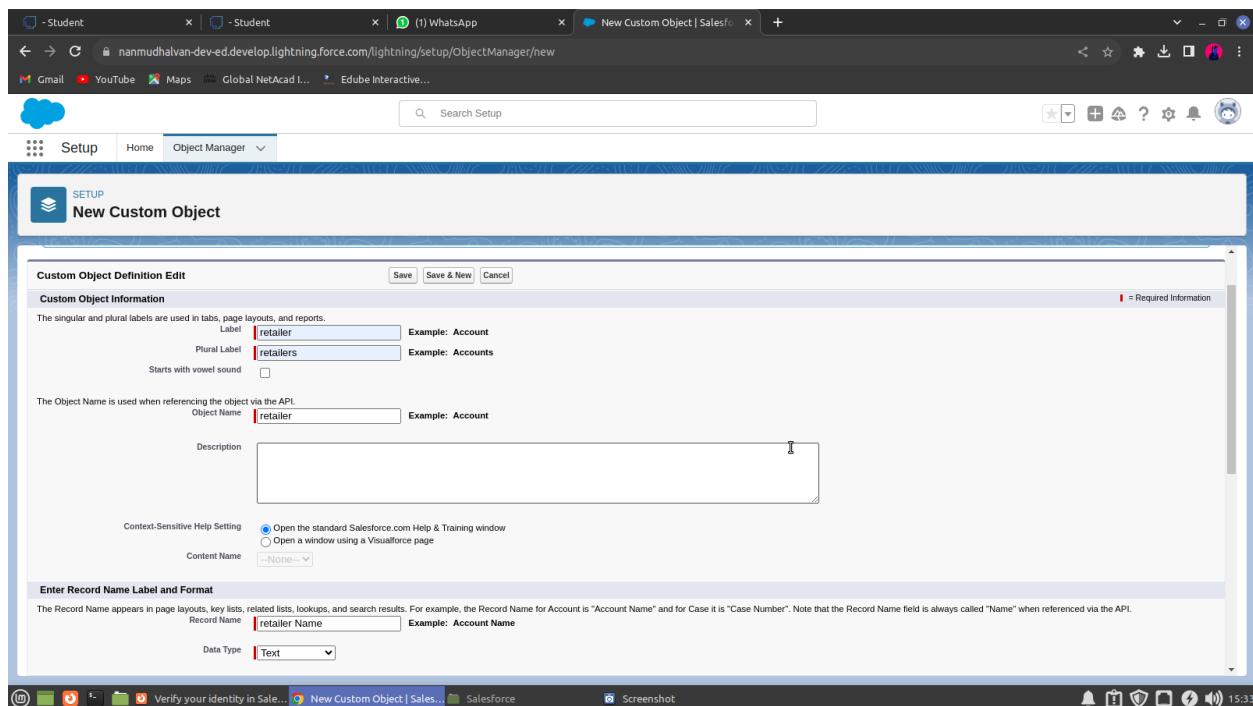
Create the Consultants Object



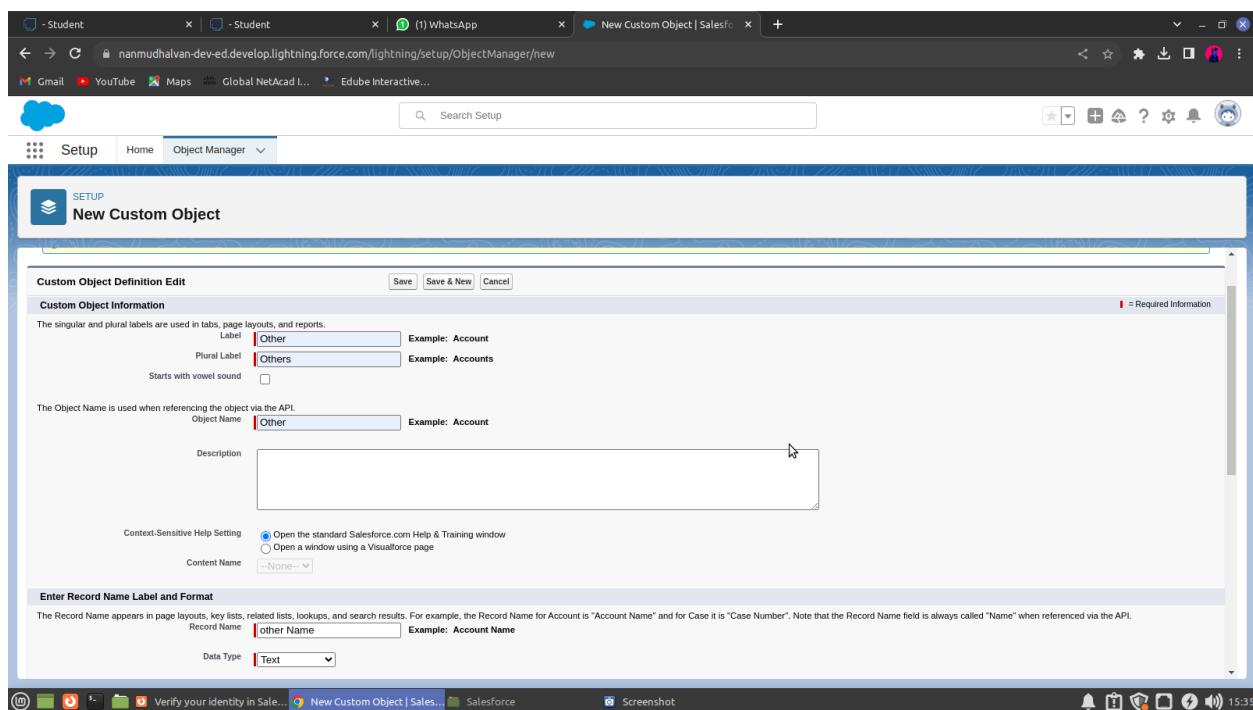
The screenshot shows the Salesforce Object Manager page. At the top, there is a navigation bar with tabs for Setup, Home, and Object Manager. The main area displays a table titled "Object Manager" with columns for Label, API Name, Type, Description, and Last Modified. The table lists numerous standard objects, including Account, Activity, Alternative Payment Method, API Anomaly Event Store, Appointment Category, Appointment Invitation, Appointment Invitee, Appointment Topic Time Slot, Asset, Asset Action, Asset Action Source, Asset Relationship, and Asset State Period. A "Create" button is visible in the top right corner of the table header.



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" and contains 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 "Open the standard Salesforce.com Help & Training window" or "Open a window using a Visualforce page"), and "Content Name" (dropdown menu with option "-None-"). Below these, there is a section for "Enter Record Name Label and Format" with fields for "Record Name" (consultant Name) and "Data Type" (Text). The status bar at the bottom shows "Verify your identity in Sales..." and "Screenshot".



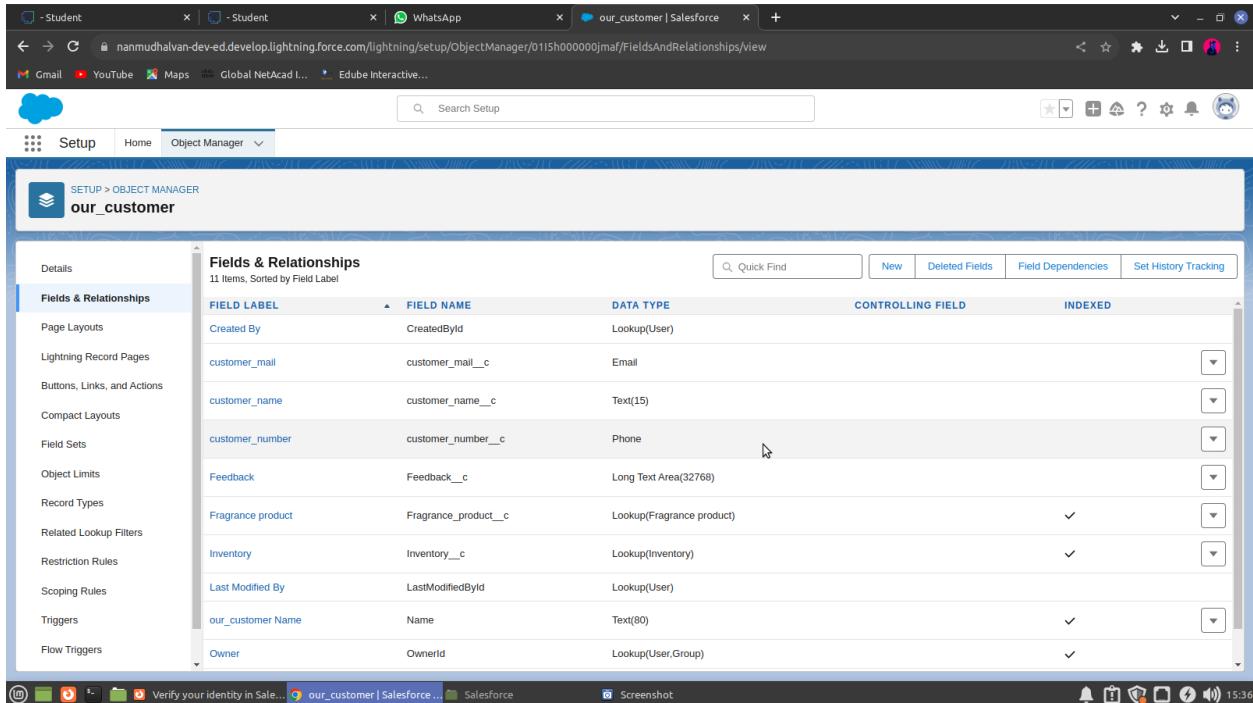
Create the Others Object



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.

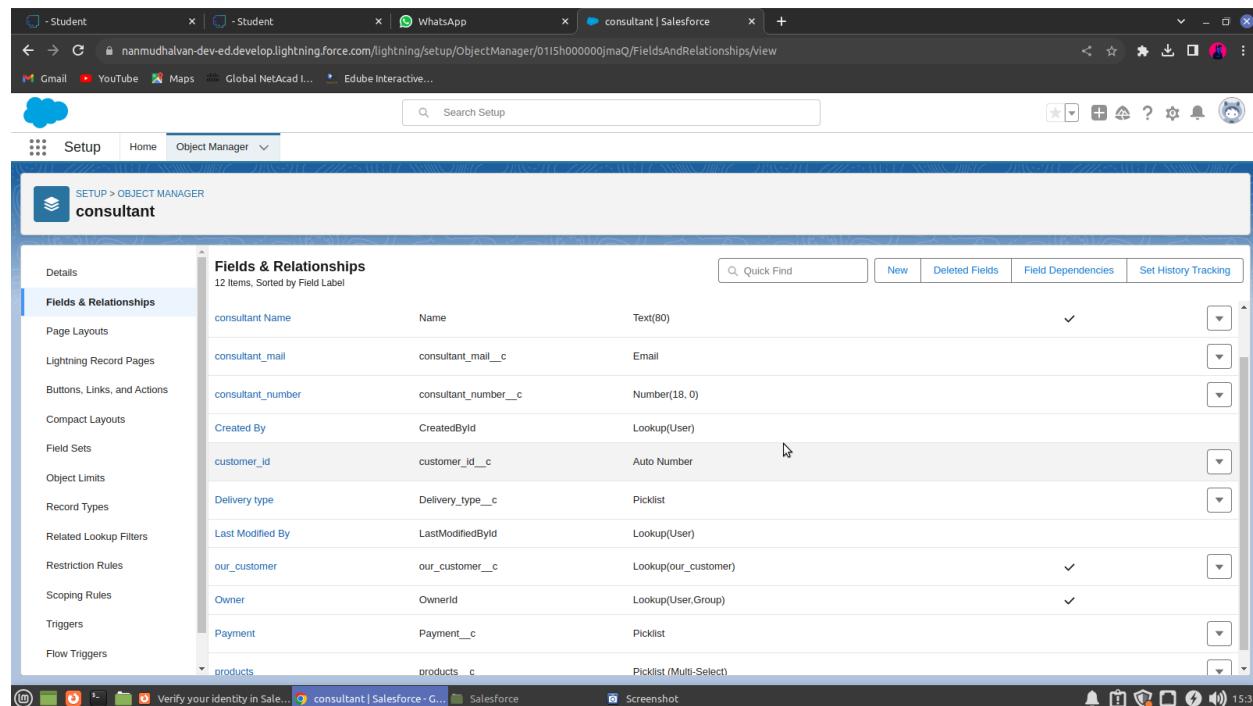
Fields in Our_Customers Objects



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

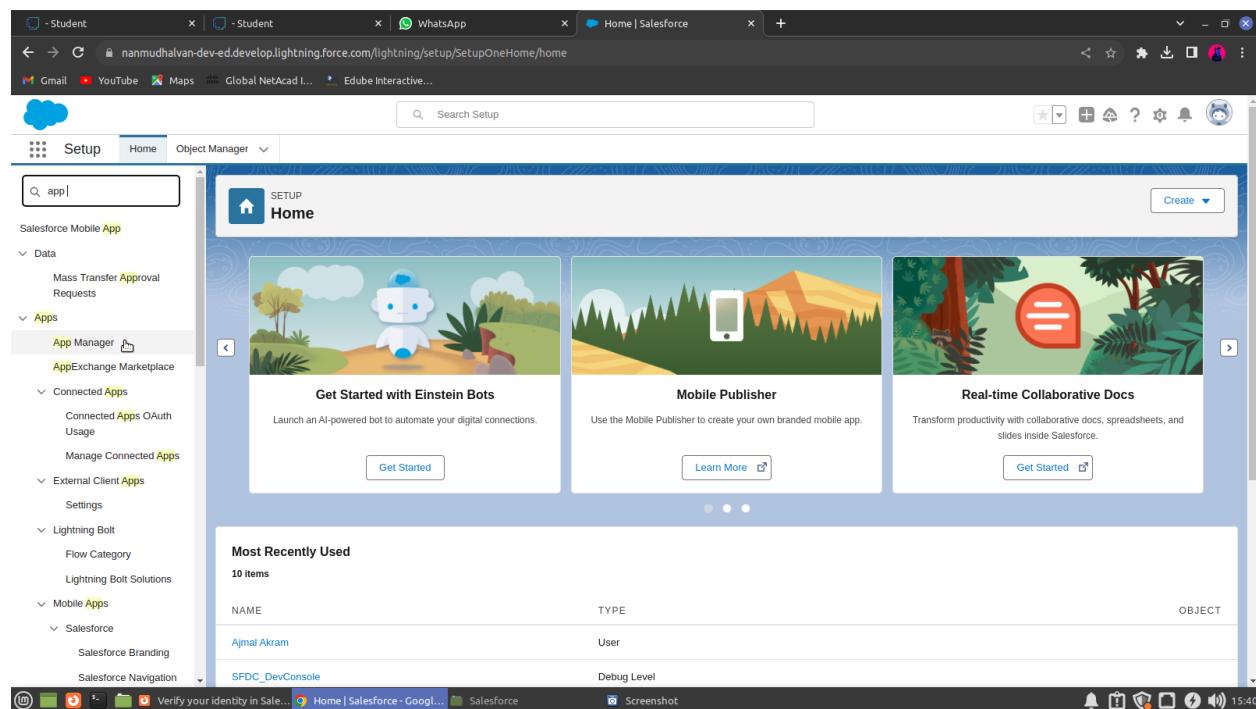
The screenshot shows the Salesforce Setup interface for the 'consultant' object. The left sidebar has 'Page Layouts' selected under 'Fields & Relationships'. The main area displays a table titled 'Page Layouts' with one item: 'consultant Layout' created by Ajmal Akram on 17/10/2023, 10:37 am, last modified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

The screenshot shows the 'consultant Layout Properties' screen. The left sidebar has 'Page Layouts' selected. The main area shows the 'Fields' section with a table of fields: consultant_number, Delivery type, consultant_name, Last Modified By, consultant_address, Created By, our_customer, consultant_email, customer_id, and Owner. Below the fields is a 'Highlights Panel' for 'consultant Sample' and sections for 'Quick Actions in the Salesforce Classic Publisher' and 'Salesforce Mobile and Lightning Experience Actions'.

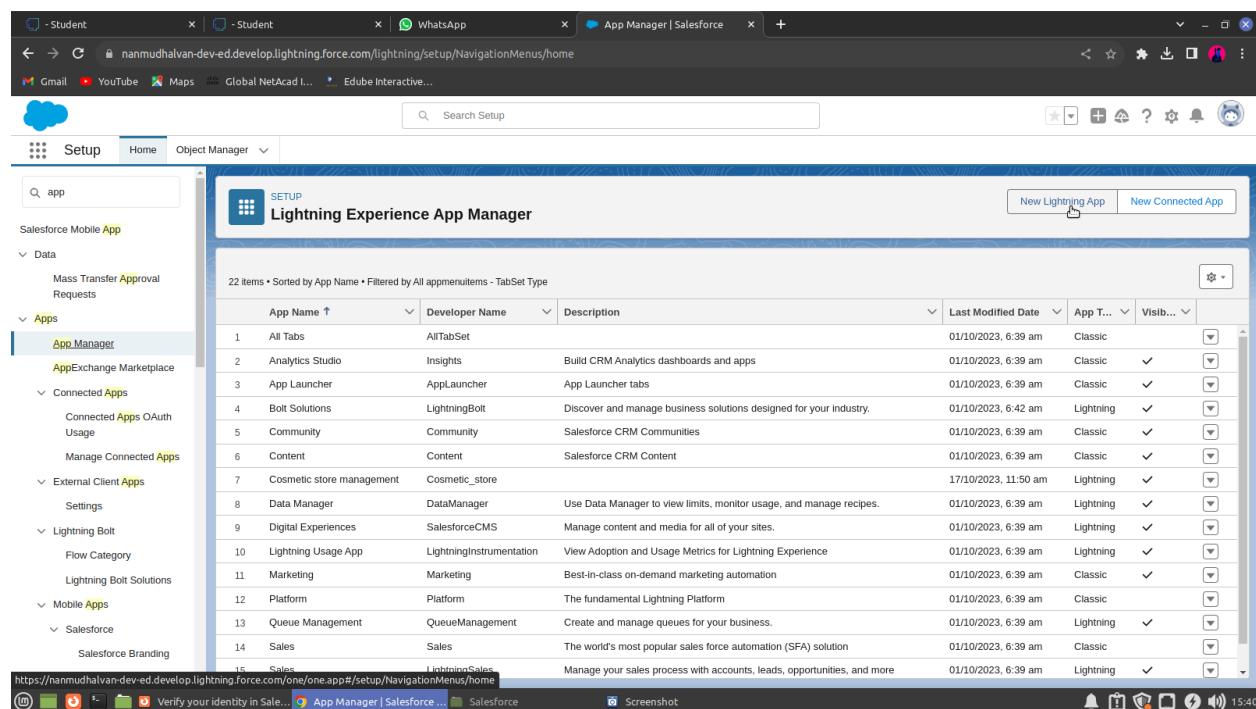
2.5 The Lightning App

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' which lists two items: 'Ajmal Akram' (User) and 'SFDC_DevConsole' (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 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 has 'New Lightning App' and 'New Connected App' buttons.

App Name ↑	Developer Name	Description	Last Modified Date	App T...	Visib...
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:
- 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

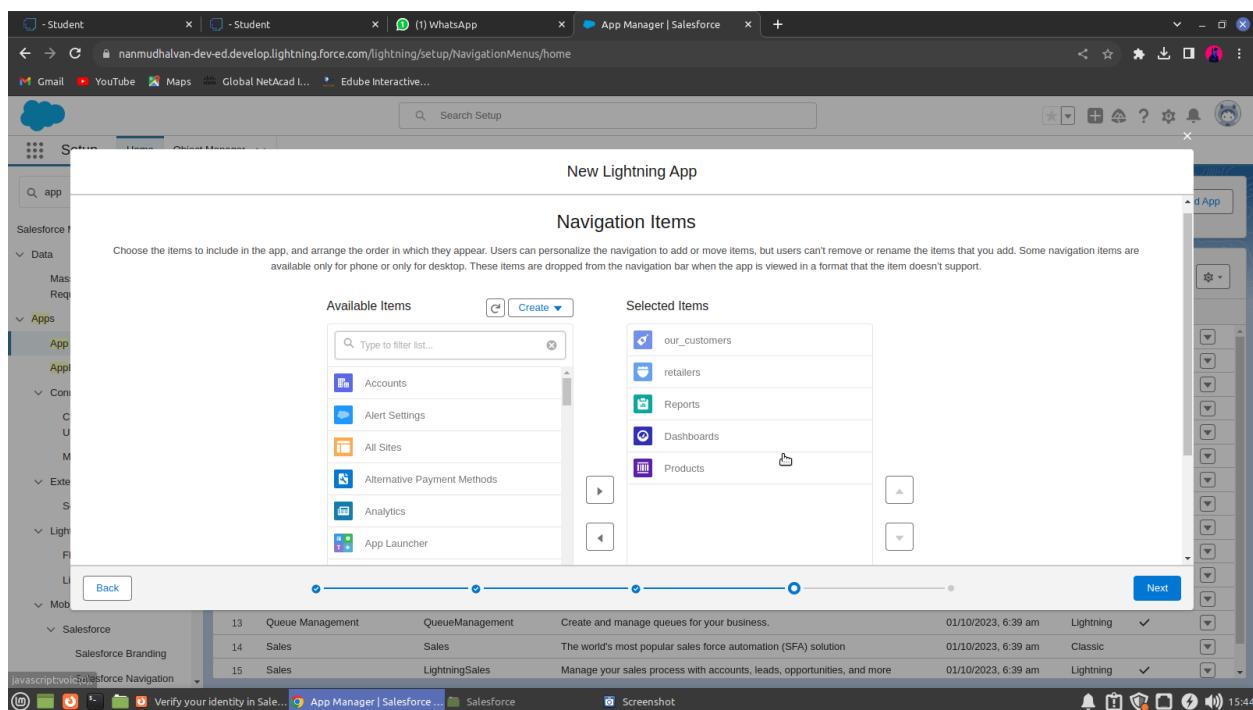
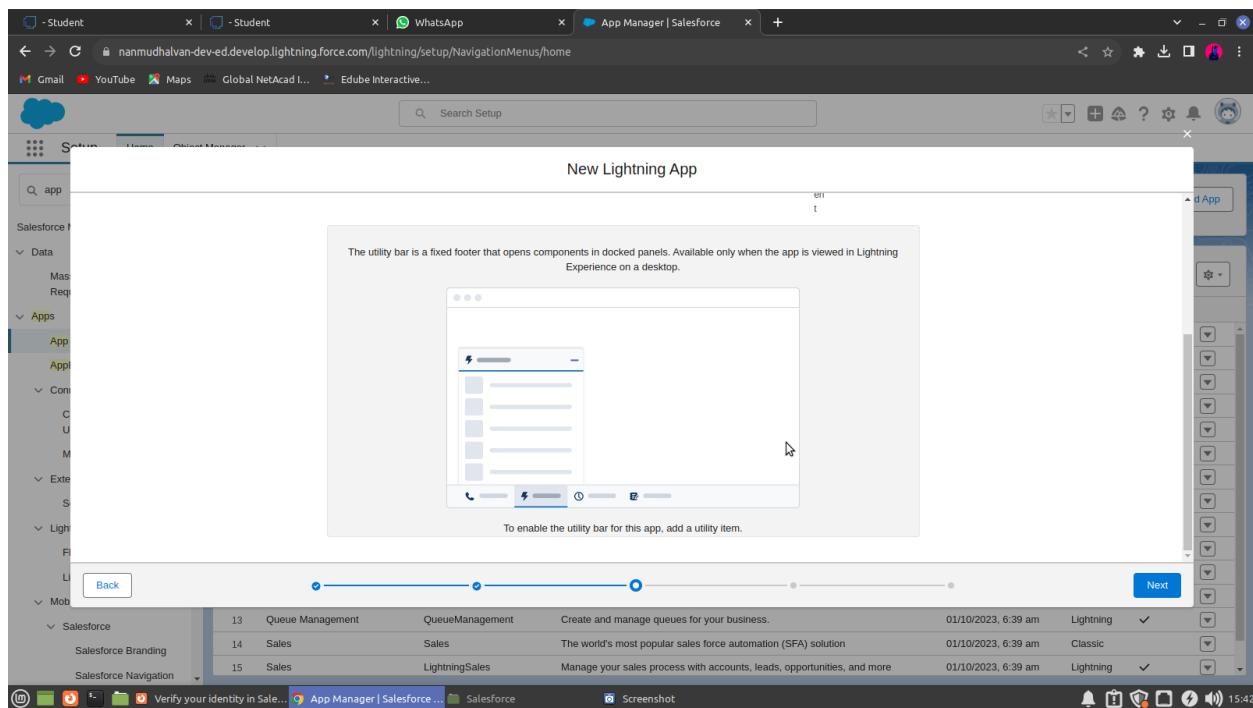
- *Navigation Style:
 - Standard navigation
 - Console navigation
- *Supported Form Factors:
 - Desktop and phone
 - Desktop
 - Phone

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



CHAPTER-3

USERS & DATA SECURITY

3.1 Profile

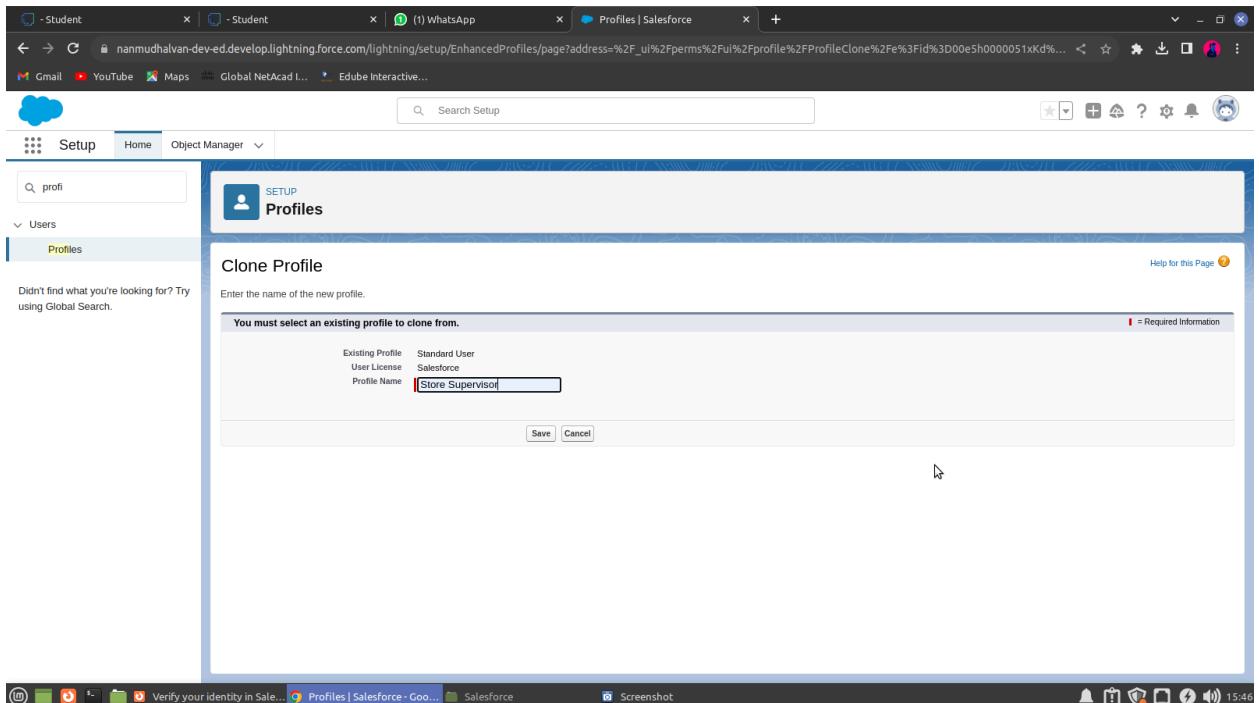
A profile is a group/collection of settings and permissions that define what a user can do in salesforce. A profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login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

Creating a Profiles

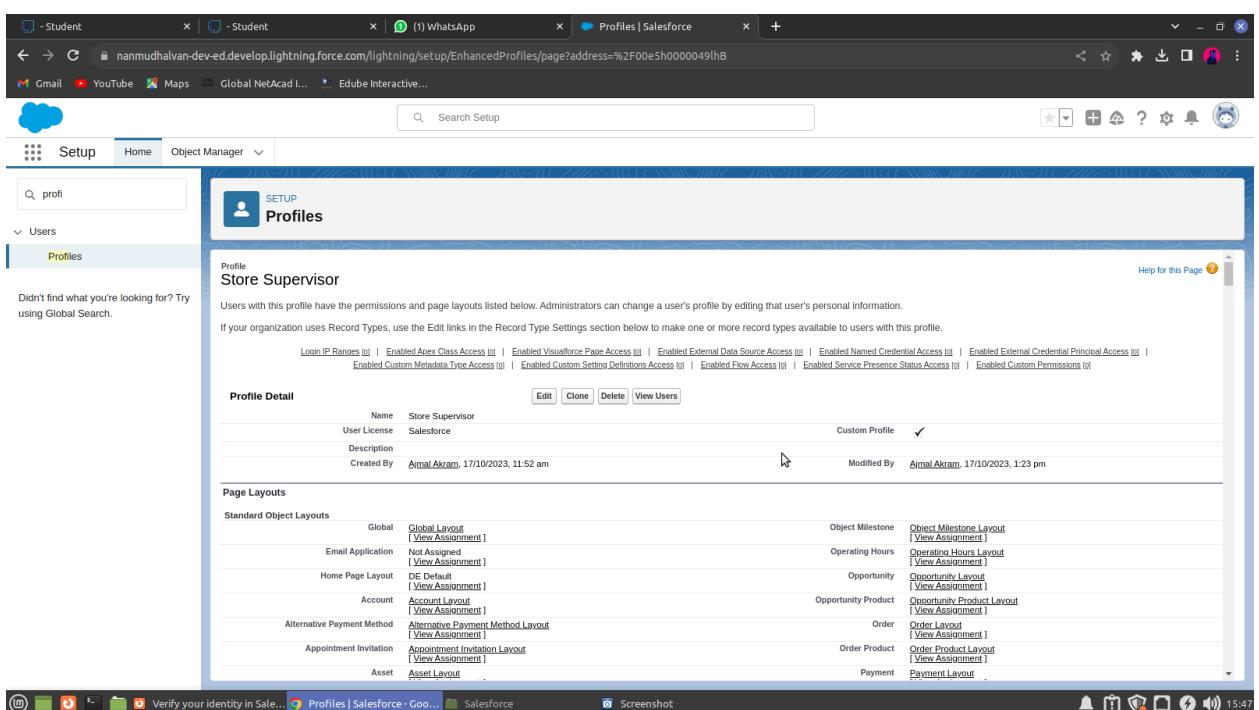
The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected under 'Users'. The search bar at the top contains 'profi'. The main area displays a list of profiles with columns for Action, Profile Name, User License, and Custom. The 'Custom' column shows checkboxes for various user licenses. The list includes profiles like 'Analytics Cloud Integration User', 'Authenticated Website', 'Salesforce Platform', and 'Customer Community Plus Login'. A navigation bar at the bottom indicates 1-25 of 41 profiles, with a 'Selected' dropdown set to 0.

The screenshot shows the Salesforce Setup interface with the 'Standard User' profile selected under 'Users'. The search bar at the top contains 'profi'. The main area displays the 'Profile Detail' section for the 'Standard User'. It shows the name 'Standard User', user license 'Salesforce', and creation details ('Created By: salesforce.com, inc., 01/10/2023, 6:39 am'). The 'Modified By' field is populated with 'Aimal Akram, 17/10/2023, 1:23 pm'. Below this is the 'Page Layouts' section, which lists various standard object layouts and their corresponding global page layouts. For example, the 'Account' object has 'Account Layout' and 'Alternative Payment Method Layout'. The 'Opportunity' object has 'Opportunity Layout' and 'Opportunity Product Layout'. The 'Order' object has 'Order Layout' and 'Order Product Layout'. The 'Payment' object has 'Payment Layout' and 'Payment Product Layout'.

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__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...

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

	Basic Access					Data Administration	
	Read	Create	Edit	Delete	View All <small>(i)</small>	Modify All <small>(i)</small>	
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 <small>(i)</small>	Modify All <small>(i)</small>	
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 with the 'Roles' tab selected. On the left, a sidebar lists various setup categories like Feature Settings, Sales, and Service. The main content area is titled 'Understanding Roles' and contains a diagram illustrating a role hierarchy. The diagram shows 'Executive Staff' at the top, which includes 'CEO President' and 'CFO VP, Sales'. Arrows point from these to 'Western Sales Director' (Director of W. Sales) and 'Eastern Sales Director' (Director of E. Sales). These two directors have arrows pointing to their respective 'Sales Rep' levels: 'Western Sales Rep' (CA Sales Rep, OR Sales Rep) and 'Eastern Sales Rep' (NY Sales Rep, MA Sales Rep). Below these are 'International Sales Director' (Director of Int'l Sales) and 'International Sales Rep' (Asian Sales Rep, European Sales Rep). A note next to the international director states: 'View & edit data, roll up forecasts, & generate reports for all users below. Can't access data of other Executive Staff members.' Another note next to the international rep states: 'View & edit data, roll up forecasts, & generate reports for users directly beneath. Can't access data of users above or at same level.' At the bottom right of the content area are 'Setup Roles' and 'Don't show this page again' buttons.

The screenshot shows the 'Role Edit' page for a role named 'Store Head'. The sidebar on the left is identical to the previous screenshot. The main content area is titled 'Role Edit' and shows the 'Store Head' configuration. It includes fields for 'Label' (set to 'Store Head'), 'Role Name' (set to 'Store_Head'), 'This role reports to' (set to 'CEO'), and 'Role Name as displayed on reports' (empty). At the bottom are 'Save', 'Save & New', and 'Cancel' buttons. The status bar at the bottom of the screen shows the time as 15:52.

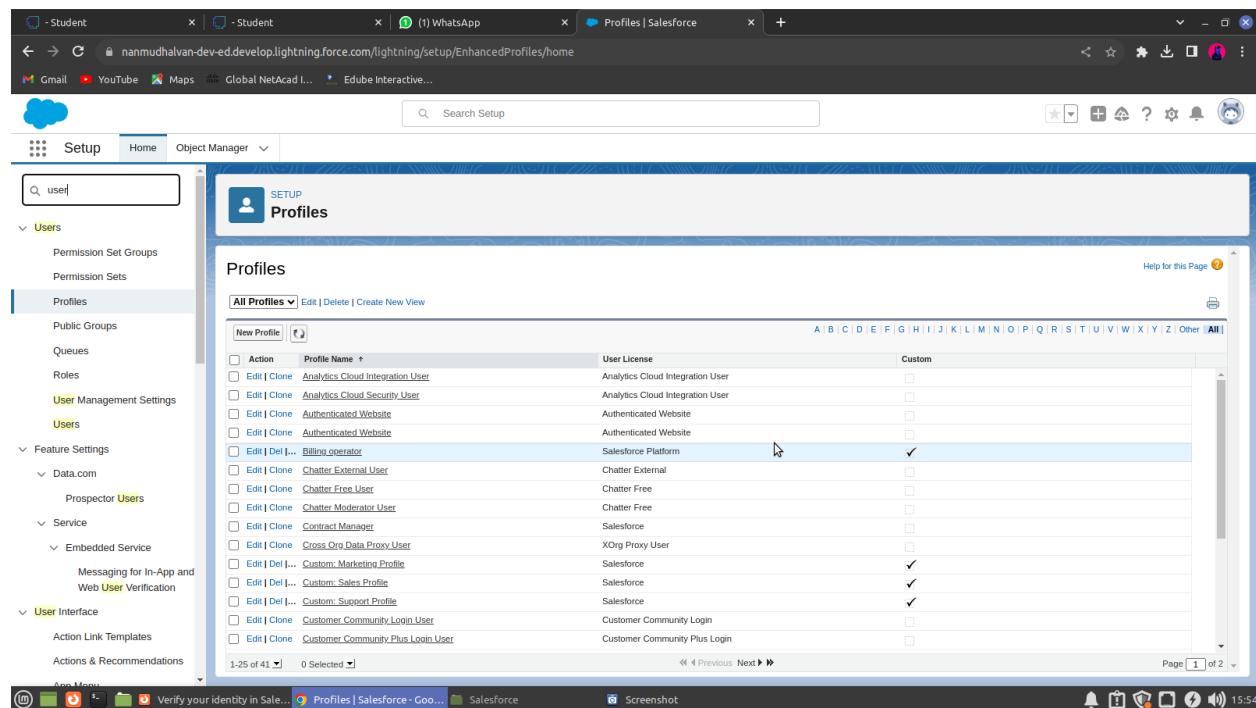
The screenshot shows the Salesforce Setup interface with the 'Roles' page selected. On the left, a sidebar lists 'Sales' and 'Service' sections under 'Feature Settings'. The main area displays the 'Role Edit' screen for the 'Billing Operator' role. The 'Label' field contains 'Billing Operator', the 'Role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

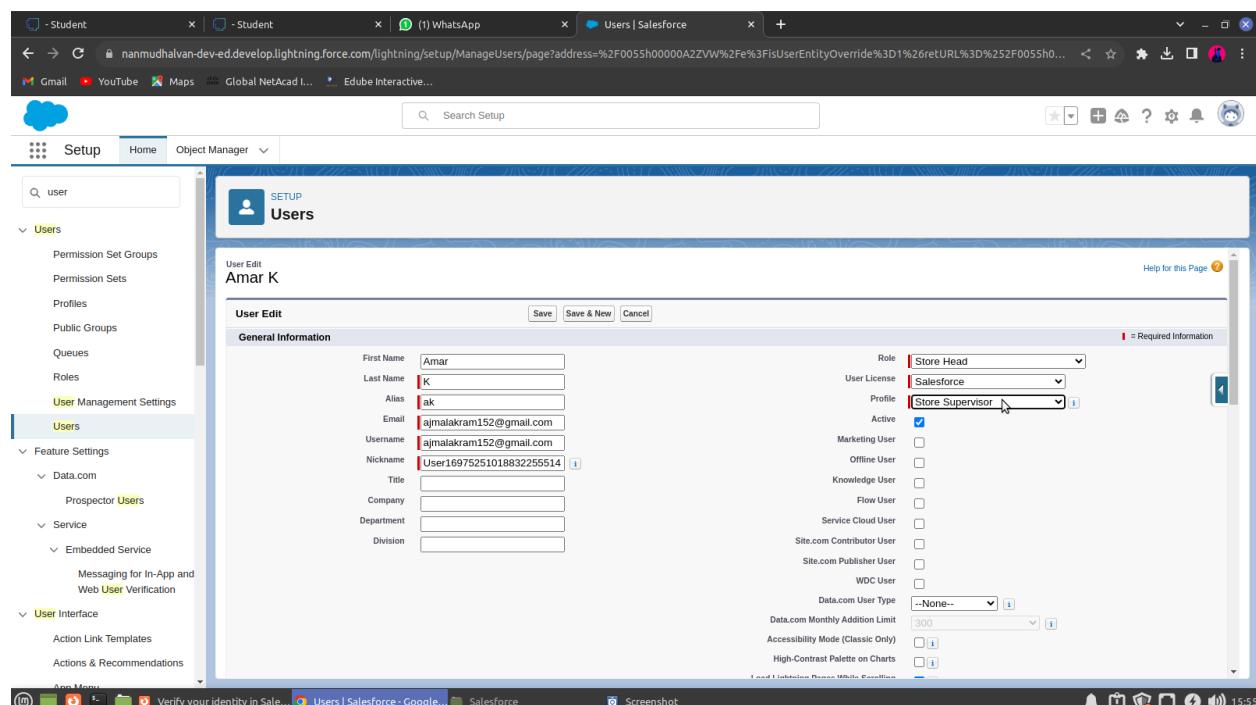
3.3 Users

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 other user settings. The 'Role' dropdown is set to 'Store Head', 'User License' to 'Salesforce', and 'Profile' to 'Store Supervisor'.

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

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' set to '(GMT+05:30) India Standard Time (Asia/Kolkata)', 'Locale' set to 'English (India)', and 'Language' set to 'English'. The 'Approver Settings' section includes fields for 'Delegated Approver' and 'Manager', both currently empty. A dropdown menu for 'Receive Approval Request Emails' is 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', 'Save & New', and 'Cancel' buttons are also present at the bottom 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 Name	Description
Service	Service Console	(Lightning Experience) Lets support agents work with multiple records across customer service...
Sales	Sales	Manage your sales process with accounts, leads, opportunities, and more
Digital Experiences	Digital Experiences	Manage content and media for all of your sites.
Salesforce Scheduler Setup	Salesforce Scheduler Setup	Set up personalized appointment scheduling.
Bolt Solutions	Bolt Solutions	Discover and manage business solutions designed for your industry.
Cosmetic Care management	Cosmetic Care management	

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.

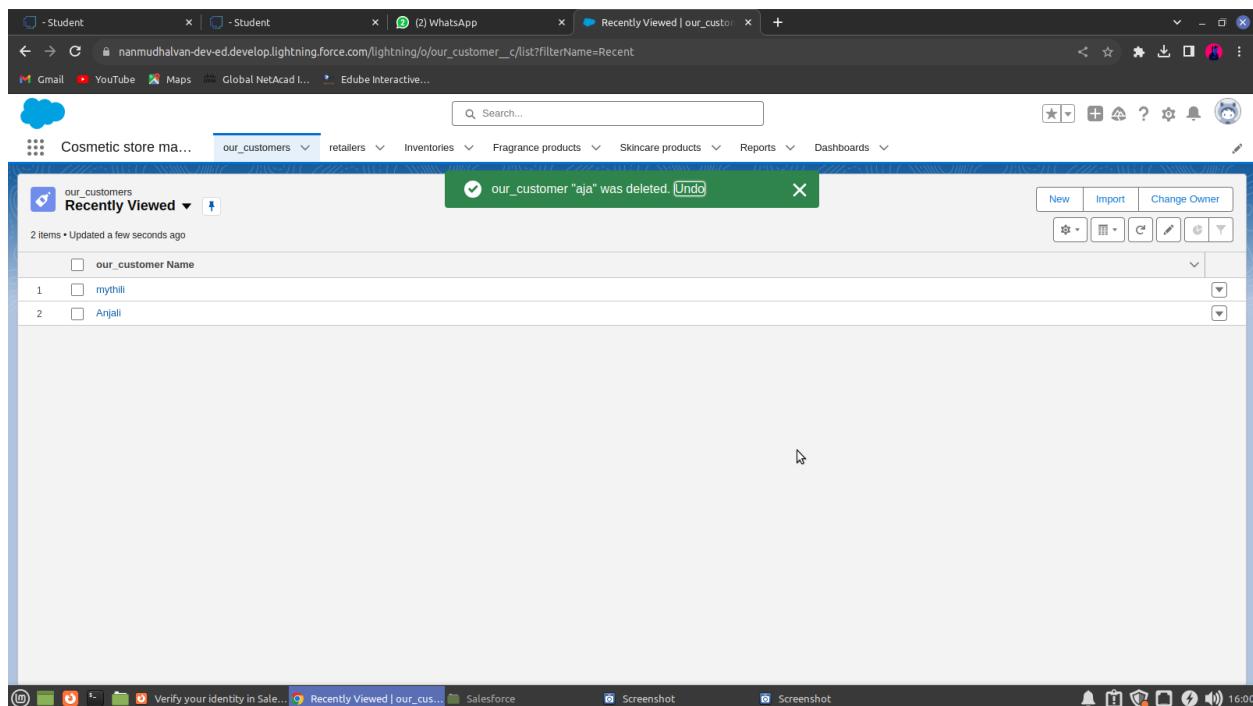
View Record (Our Customer)

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 the Salesforce Lightning Experience interface. The top navigation bar includes tabs for Student, Student, WhatsApp, and a specific record for 'aja | our_customer | Salesfor...'. Below the bar, the page title is 'nanmudhalvan-dev-ed.develop.lightning.force.com/lightning/r/our_customer_c/a085h00000MRV66AAH/view'. The main content area displays a customer record for 'aja'. The 'Details' tab is selected, showing fields like 'our_customer Name' (aja), 'customer_name' (aju), 'customer_mail' (aja@mail.com), 'customer_number' (789456132), 'Feedback' (good), and various product categories (Inventory, Skincare product, Fragrance product). The 'Owner' field is set to 'Ajmal Akram'. On the right side, there is 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 links for New Contact, Edit, and New Opportunity.

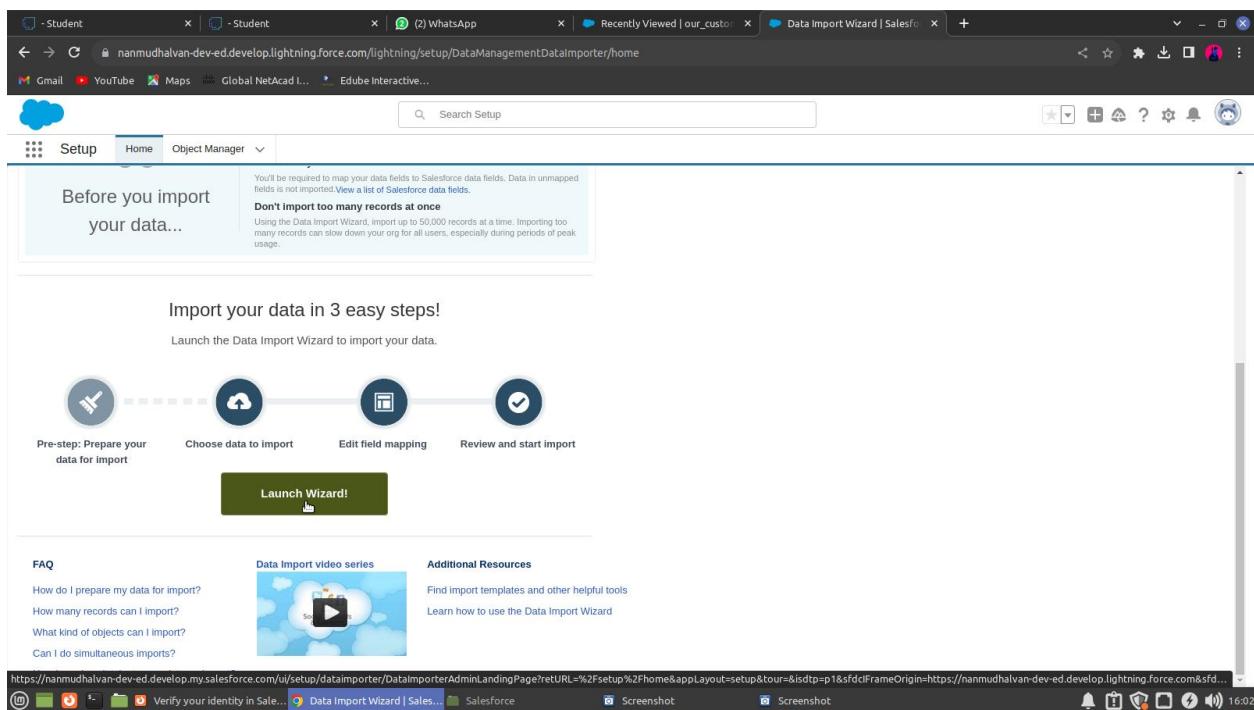
Delete Record (Our Customer)

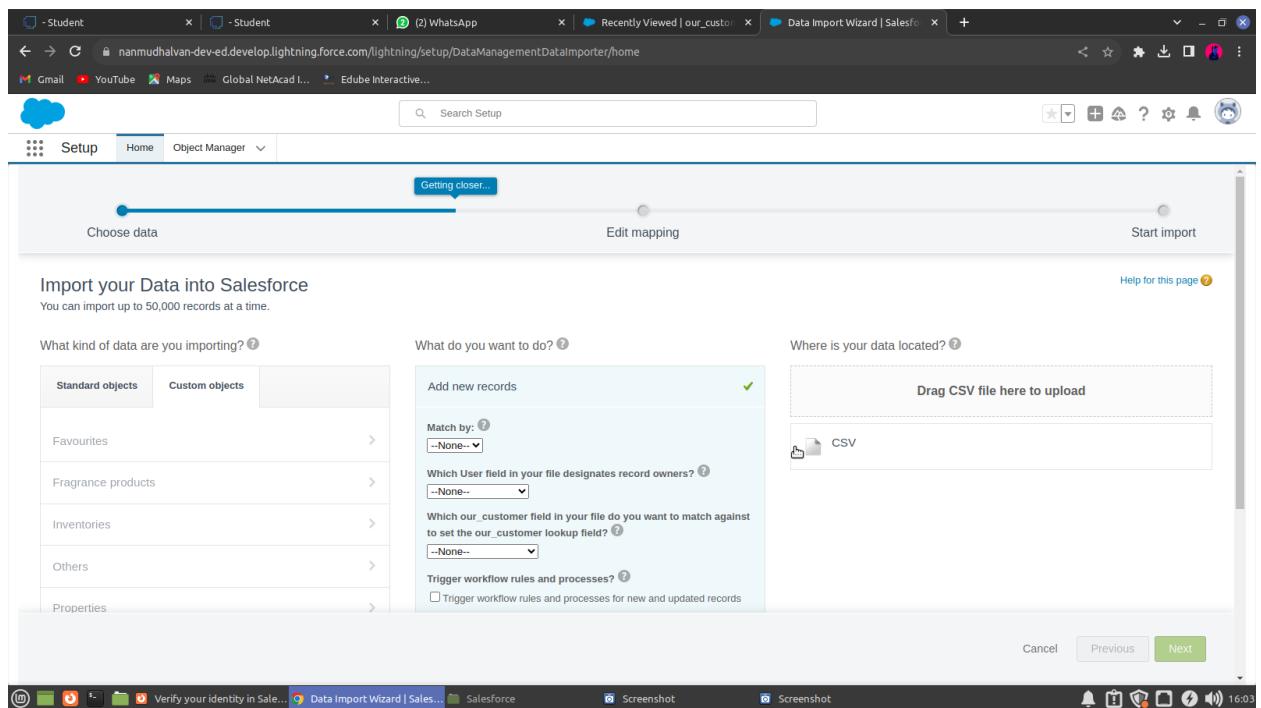
The screenshot shows the Salesforce Lightning Experience interface. The top navigation bar includes tabs for Student, Student, WhatsApp, and a recent record for 'Recently Viewed | our_customer | Salesfor...'. Below the bar, the page title is 'nanmudhalvan-dev-ed.develop.lightning.force.com/lightning/o/our_customer_c/list?filterName=Recent'. The main content area displays a list of recently viewed customer records: 'aja', 'mythili', and 'Anjali'. A modal dialog box is open in the center, titled 'Delete our_customer', asking 'Are you sure you want to delete this our_customer?'. The dialog has 'Cancel' and 'Delete' buttons. The background shows the same customer record details as the previous screenshot, with the 'Activity' section visible on the right.



Data Import

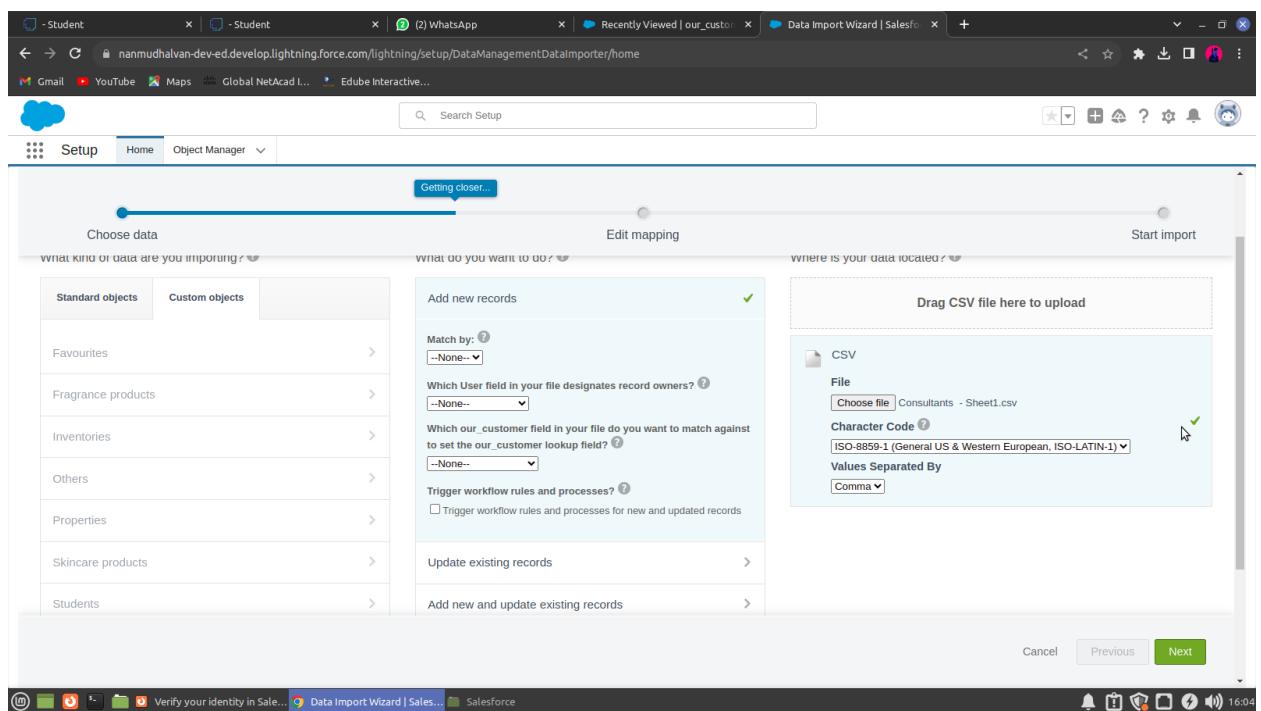
The Data Import Wizard is one of various tools available to Salesforce users for importing data. The tool is best used when importing data into the Account, Contact, Lead, or Solution objects along with any custom objects within your Salesforce organization





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

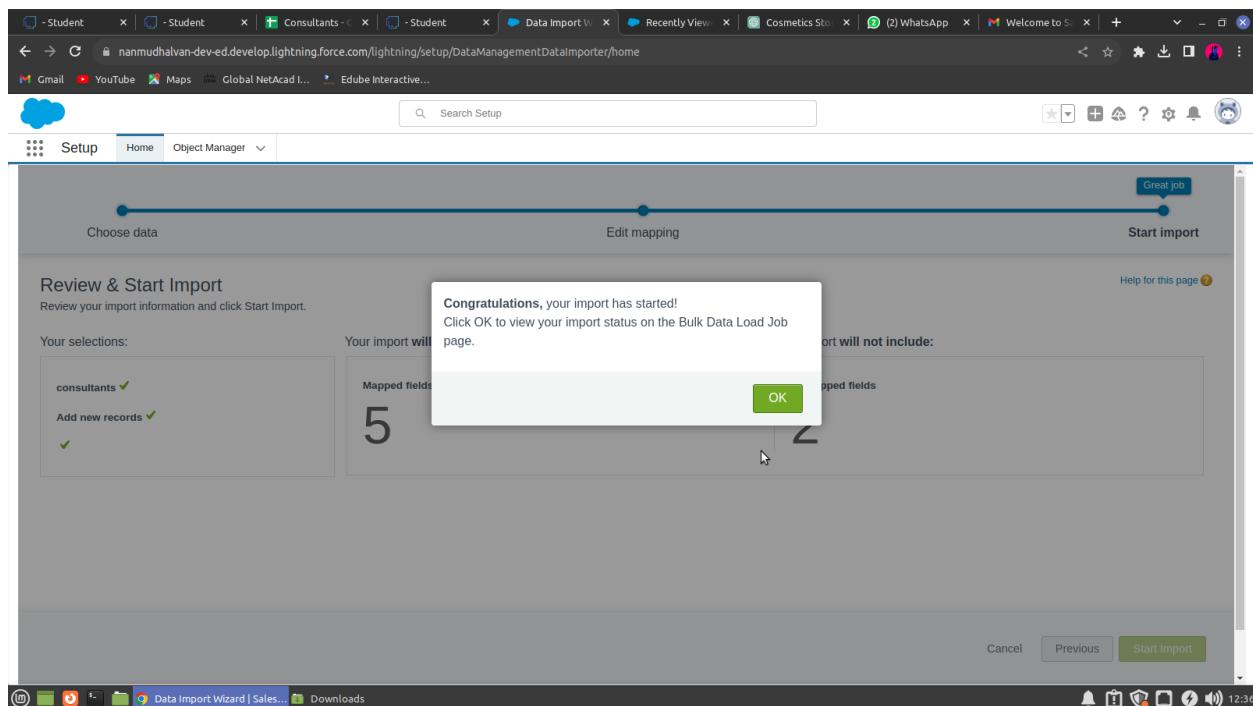
Your import will not include:

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	Aimat.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 Flows home page. On the left, there is a sidebar with various categories like Apps, Lightning Bolt, Process Automation, Workflow Actions, and Environments. The main area displays a table titled 'Flow Definitions' with columns for 'Flow Label', 'Process Type', 'Active', 'Temp...', 'Package State', 'Pack...', 'Last Modif...', and 'Last Modified Date'. The table lists several flows, such as 'Basic Approval Request', 'Book Appointment from Invitation', and 'Change Case Owner to Incident Owner'. 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 ('Consultanaterecord'), a Data Type ('Record'), and an Object ('consultant'). The 'Availability Outside the Flow' section includes checkboxes for 'Available for input' (checked) and 'Available for output'. The 'Screen Properties' panel on the right shows the label 'Consultanaterecord' and the API name 'Consultanaterecord'. Buttons at the bottom of the modal include 'Cancel' and 'Done'.

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 tabs: Student, Student, WhatsApp, Reports | Salesforce, and Home | Salesforce. Below the tabs, the page header includes a search bar, a 'Reports' icon, and navigation links for Cosmetic store ma..., our_customers, retailers, Inventories, Fragrance products, Skincare products, Reports, and Dashboards. The main content area displays a table titled 'Recent' with one item: 'New consultants Report'. The table has columns for REPORTS, Report Name, Description, Folder, Created By, Created On, and Subscribed. A sidebar on the left lists categories: 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 tabs: Student, Student, WhatsApp, Report Builder | Salesforce, and Home | Salesforce. Below the tabs, the page header includes a search bar, a 'Report Builder' icon, and navigation links for Cosmetic store ma..., our_customers, retailers, Inventories, Fragrance products, Skincare products, Reports, and Dashboards. The main content area is titled 'Create Report' and contains three main sections: 'Category' (Recently Used: All, Accounts & Contacts, Opportunities, Customer Support Reports, Leads, Campaigns, Activities, Contracts and Orders, Price Books, Products and Assets, Administrative Reports), 'Select a Report Type' (Search Report Types...), and 'Details' (consultants - Standard Report Type, Start Report button, Details tab, Fields (20) link, Created By You section with New consultants Report, Created By Others section with No Reports Yet, Objects Used in Report Type section with Owner). A large 'X' button is visible in the top right corner of the modal.

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:

- Bucket Name:
- Value: NetBank (3) Cash
- Unbucketed Values: NetBank, Cash

Buttons at the bottom include "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

At the bottom, there 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 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

At the bottom, there 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.

	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 a Salesforce interface for managing reports. At the top, there are several tabs: 'Student', '-Student', '(2) WhatsApp', 'Consultant dashboard | Sales', 'Home | Salesforce', and a '+' button. Below the tabs, a search bar contains 'Search...'. A sidebar on the left lists categories: 'Reports', 'Recent' (selected), 'Created by Me', 'Private Reports', 'Public Reports', 'All Reports', 'Folders', 'All Folders', 'Created by Me', 'Shared with Me', and 'Favorites', 'All Favorites'. The main content area displays a table for the 'Recent' report. The table has columns: 'REPORTS', 'Report Name', 'Description', 'Folder', 'Created By', 'Created On', and 'Subscribed'. One row is visible: 'New consultants' (Report Name), 'Private' (Folder), 'Ajmal Akram' (Created By), '17/10/2023, 12:49 pm' (Created On). At the bottom of the page, there are browser status icons and a system tray showing the date and time as 16:10.

The screenshot shows a Salesforce dashboard. The title bar includes tabs for 'Student', '-Student', '(2) WhatsApp', 'Consultant dashboard | Sales', 'Home | Salesforce', and a '+' button. The dashboard itself has a header 'Consultant dashboard' with a 'Done' button. On the left, there is a chart titled 'New consultants Report' showing 'Record Count' for 'NetBanking' (8) and 'Cash' (4). Below the chart is a link 'View Report (New consultants Report)'. The main area of the dashboard is a large, empty grid table with various columns and rows. At the bottom, there are browser status icons and a system tray showing the date and time as 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 also present. A green success message box with a checkmark and the text "Dashboard saved" is overlaid on the dashboard area. The main content is a chart titled "New consultants Report" showing the count of records by payment type. The chart has two bars: one for "NetBanking" with a value of 8, and one for "Cash" with a value of 4. Below the chart is a link "View Report (New consultants Report)". The bottom of the screen shows the standard Salesforce navigation bar with icons for Home, Sales, and other applications, along with system status indicators like battery level and signal strength.

View Dashboard

This screenshot shows the same Salesforce dashboard after it has been saved. The title now reads "Dashboard Consultant dashboard" and includes the timestamp "As of 17-Oct-2023, 4:12 pm-Viewing as Ajmal Akram". The dashboard content and chart remain identical to the previous screenshot, displaying the "New consultants Report" with 8 records for "NetBanking" and 4 records for "Cash". The blue decorative background is visible behind the chart area. The bottom of the screen shows the standard Salesforce navigation bar and system status indicators.

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