

COSMETIC STORE MANAGEMENT

SALESFORCE NAAN MUDHALVAN PROJECT REPORT

Submitted By

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reports in salesforce

1. ****Log into Salesforce****: Access your Salesforce account with the necessary permissions.

2. ****Navigate to Reports****:

- Click on the "App Launcher" (grid icon) and search for "Reports."
- Click on "Reports" to open the reporting interface.

3. ****Create a New Report****:

- Click "New Report."
- Select the relevant report type, which might be related to opportunities, leads, accounts, or custom objects based on your specific use case.

4. ****Customize the Report****:

- Use the report builder to select the fields you want to include in your report. For cosmetics sales, you might include data like product names, sales amounts, dates, and customer information.
- Apply filters to narrow down the data based on criteria such as time periods, product categories, or regions.

5. ****Group and Summarize Data****:

- Group data by relevant attributes, such as product categories or sales representatives.
- Add summary formulas to calculate totals, averages, or other metrics.

6. ****Save and Run the Report****:

- Give your report a meaningful name.
- Click "Save & Run" to generate the report with the selected parameters.

7. ****View and Export****:

- View the report results in Salesforce. You can customize the display, chart the data, and apply additional filters.
- Export the report in various formats like Excel, CSV, or PDF for further analysis.

8. ****Schedule and Share Reports**** (optional):

- If you need to regularly generate specific reports, you can schedule them to be emailed to specific users or groups at specific intervals.