**Cosmetic Store Management**

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**1. Introduction**

**1.1 Project Overview**

This document outlines the project documentation for a Salesforce-based cosmetic store management system. The system is designed to streamline operations, provide valuable insights, and enhance decision-making for the cosmetic store.

**1.2 Project Objectives**

* Import and manage consultant data, including ConsultantName, DeliveryType, Products, and Payment details.
* Create reports to analyze consultant performance, delivery efficiency, product popularity, and payment trends.
* Develop interactive dashboards to visualize key metrics and trends.

**1.3 Project Scope**

The project scope includes the following key components:

* Data import and validation
* Report creation and customization
* Dashboard design and development

**2. System Requirements**

**2.1 Hardware Requirements**

* Sufficient computing power to handle data processing and reporting.
* Adequate storage capacity for data storage and backups.
* Internet connectivity for accessing Salesforce and external systems.

**2.2 Software Requirements**

* Salesforce platform with appropriate licenses and permissions.
* Data Loader for importing data into Salesforce.
* Report Builder for creating custom reports.
* Dashboard Builder for designing interactive dashboards.

**3. Data Import and Validation**

* Data Loader: Use Salesforce Data Loader to import data from external sources (e.g., spreadsheets, databases) into the custom objects.
* Data Validation: Implement data validation rules to ensure data integrity and consistency during import.

**4. Reporting and Analysis**

* Standard Reports: Utilize Salesforce's standard reports to analyze consultant data, including ConsultantName, DeliveryType, Products, and Payment details.
* Custom Reports: Create custom reports using Report Builder to address specific business needs.
* Report Types: Define report types to specify the objects and fields included in reports.

**5. Dashboard Development**

* Dashboard Builder: Use Salesforce's Dashboard Builder to create interactive dashboards.
* Dashboard Components: Utilize various components (e.g., charts, tables, metrics) to visualize data.
* Dashboard Filters: Apply filters to customize dashboard views based on specific criteria.

**Steps for Importing Data**

**To Import Data**

1. From Setup, click the Home tab.
2. In the Quick Find box, enter Data Import and select Data Import WizardA screenshot of a computer

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3. Click Launch Wizard!

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1. Click the Custom Objects tab and select the Consultant object.A screenshot of a computer

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2. Select Add new Records.

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1. Click CSV and choose file Consultant\_CSV which we made earlier. Click Next.

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1. Since the field names in the CSV file (CSV Header) are the same as the field names in your object (Mapped Salesforce Object), the fields are automatically mapped. Click Next.

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1. The next screen gives you a summary of your data import. Click Start Import.

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1. Click OK on the popup.

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    10. Make sure you have 0 records under the records failed column.  
**Note** - Do Field mapping carefully.

**Steps for Creating Report**

**Create Report**

1.Click App Launcher

2.Select Urban Color App

3.Click reports tab

4.Click New Report.

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5.In Group Rows Add Payment Type Bucket Field.

6.Click refresh

7.Click Save and Run

8.Give report name – Consultant report

9.Click Save

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**Steps for Creating Dashboard**

Create Dashboard

1. Click on the Dashboards tab from the Urban Color application.
2. Click on the new dashboard.
3. Give name- Consultant Dashboard
4. Click create

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**DashBoard**

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