Urban Color Management System

Empowering Colourful Lifes

Developed By

Keerthana Velpula

214g1a0542@srit.ac.in

Abstract

Urban color Management System is a specialized **Cosmetics Store Management** Salesforce is a solution that helps cosmetics stores manage their operations efficiently and effectively. The solution is built on the Salesforce platform, which provides a powerful and scalable platform for managing customer relationships, sales, and inventory.cosmetics stores improve their operational efficiency, enhance customer engagement, and drive growth.

Salesforce is a comprehensive solution for cosmetics stores, offering tools to streamline operations, manage customer relationships, and optimize sales and inventory. Built on the scalable Salesforce platform, it enhances customer engagement, improves operational efficiency, and supports business growth. With features like customer insights, personalized marketing, and sales automation, it helps cosmetics stores drive better customer experiences and achieve their business goals efficiently.

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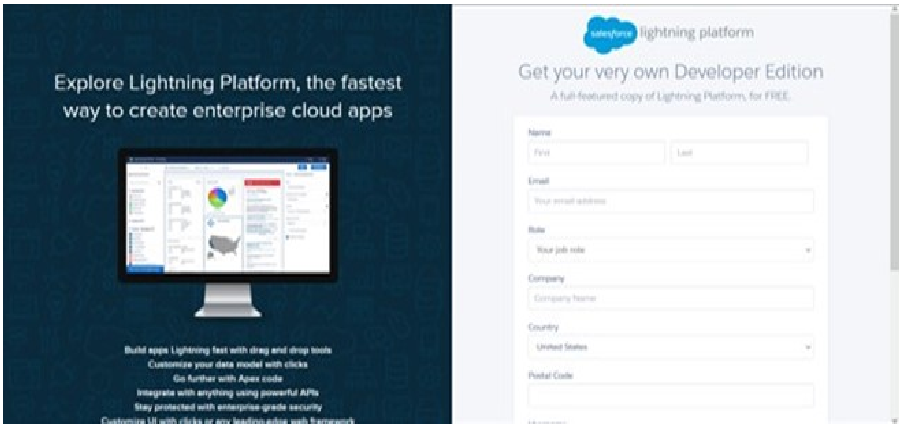
1.Creating a Developer Account in Salesforce

Step 1: Sign Up for a Developer Org

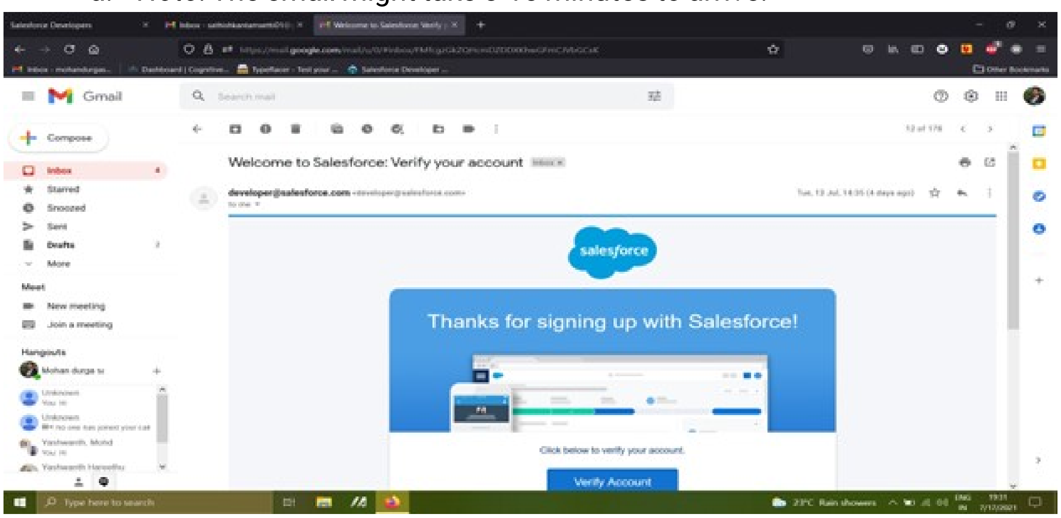
1. **Go to**developers.salesforce.com/signup.
2. **Click on** "Sign Up."
3. **Fill out the Sign-UpForm** with the following details:
    a. **First Name & Last Name**
    b. **Email**
    c. **Role**:Developer
    d. **Company**: [Your College Name]
    e. **Country**: India
    f. **Postal Code**: [Your Pin Code]
    g. **Username**: Create a username using a combination of your name and company.This does not need to be a valid email; you can format it as `username@organization.com`.
4. **Click on "Sign Up**"after filling in all the details.



Step 2: Account Activation

1. **Go to your email inbox** that you used for signingup.

2. **Find the verification email** from Salesforce and click on the "Verify Account" link toactivate your account.
    a. *Note*: The email might take 5-10 minutes to arrive.



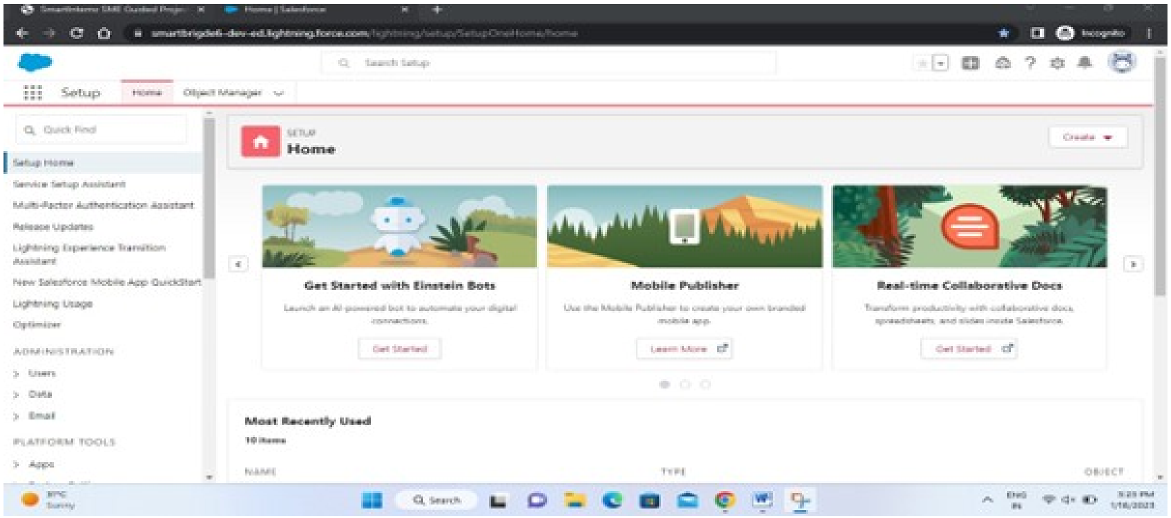
Step 3: Login to Your Salesforce Account

1. **Go to**login.salesforce.com.

2. **Enter your usernameand password** created duringthe sign-up process.

3. **Login** to accessyour Salesforce Developer account.

    a. You will see the home page after logging in.



2.Salesforce Objects

Salesforce objects are database tablesthat allow you to storedata specific to an organization. Objects in Salesforce are of two types:

1. **Standard Objects**: These are the pre-built objects provided by Salesforce, such as Users,Contracts, Reports, Dashboards, and more. Standard objects form the foundation of Salesforce's data structure and cover common business scenarios.
2. **Custom Objects**: These are user-defined objects created to store data that is unique to your organization's needs. In the context of the Urban Color Management System, examples of custom objectsinclude **Our Customers**, **Consultants**, **Retailers**, and **Others**.

a. Creating Objects for Urban Color Management

In the Urban Color Management System, we need to create three custom objects: **Our Customers**, **Consultants**, **Retailers**, and **Others**. The following stepswill guide you through the process of creating these objects in Salesforce.

Step 1: Access Setup

1. **Click on the gear icon** in the upper-right corner of Salesforce.
2. **Select "Setup"** from the dropdown menu.

Step 2: Open Object Manager

1. **Click on the "Object Manager"** tab located next to the Home tab.

Step 3: Create a Custom Object

.
1. On the **Object Manager** page, look to the right side of the screen.
2. **Click on the "Create" dropdown** and select **Custom Object**.

Step 4: Create"Our Customer" Object

1. On the **Custom Object Definition** page, enter the following details:
   a. **Label**:Our Customer
   b. **Plural Label**: Our Customers

   c. **Record Name**: Our Customer

2.Check the followingboxes:

- Allow Reports
- Allow Search

Click "Save" to createthe object.

Step 5: Createa Custom Tab for "Our Customer"

1. **Click the "Home" tab** and enter "Tabs" in the Quick Find searchbar.
2. **Select "Tabs"** from the search results.
3. Under **Custom Object Tabs**, click **New**.
4. For **Object**, select **Our Customer**.
5. For **Tab Style**, selectany icon that represents your object.
6. Leave all other settings as defaults and click **Next**.
7. **Click "Next"** again, then **Save**.

2.2 Creating the Consultants Object

The following steps will guide you throughthe process of creating the **Consultants** object in Salesforce.

Step 1: Access Setup

i. **Click on the gear icon** in the upper-right corner of Salesforce.

ii. **Select "Setup"** from the dropdown menu.

Step 2: Open Object Manager

1. **Click on the "Object Manager"** tab located next to the Home tab.

Step 3: Create a Custom Object

1. On the **Object Manager** page, look to the right side of the screen.
2. **Click on the "Create" dropdown**and select **Custom Object**.

Step 4: Create "Consultants" Object

1. On the **Custom Object Definition** page, enter the following details:
    a. **Label**: Consultant
    b. **Plural Label**: Consultants
    c. **Record Name**: Consultant
2. **Check the followingboxes**:
    a. **Allow Reports**
    b. **Allow Search**
3. **Click "Save"** to createthe object.

Step 5: Create a Custom Tab for "Consultants"

1. **Click the "Home" tab** and enter "Tabs" in the Quick Find searchbar.

2. **Select "Tabs"** from the search results.
3. Under **Custom Object Tabs**, click **New**.
4. For **Object**, select **Consultants**.
5. For **Tab Style**, selectany icon that represents your object.
6. Leave all other settings as defaults and click **Next**.
7. **Click "Next"** again, then **Save**.

2.3 Creating the Retailers Object

The following stepswill guide you through the process of creating the **Retailers**object in Salesforce.

Step 1: Access Setup

i. **Click on the gear icon** in the upper-right corner of Salesforce.
ii. **Select "Setup"** from the dropdown menu.

Step 2: Open Object Manager

1. **Click on the "Object Manager"** tab located next to the Home tab.

Step 3: Create a Custom Object

1. On the **Object Manager** page, look to the right side of the screen.
2. **Click on the "Create" dropdown** and select **Custom Object**.

Step 4: Create"Retailers" Object

1. On the **Custom Object Definition** page, enter the following details:
    a. **Label**:Retailer

b. **Plural Label**: Retailers
c. **Record Name**: Retailer

2. **Check the followingboxes**:
    a. **Allow Reports**
    b. **Allow Search**
3. **Click "Save"** to createthe object.

Step 5: Create a Custom Tab for "Retailers"

1. **Click the "Home" tab** and enter "Tabs" in the Quick Find searchbar.
2. **Select "Tabs"** from the search results.
3. Under **Custom Object Tabs**, click **New**.
4. For **Object**, select **Retailers**.
5. For **Tab Style**, selectany icon that represents your object.
6. Leave all other settingsas defaults and click **Next**.
7. **Click "Next"** again, then **Save**.

2.4 Creating the Others Object

The following stepswill guide you through the process of creating the **Others** object in Salesforce.

Step 1: Access Setup

iii. **Click on the gear icon** in the upper-right corner of Salesforce.

iv. **Select "Setup"** from the dropdown menu.

Step 2: Open Object Manager

1. **Click on the "Object Manager"** tab located next to the Home tab.

Step 3: Create a Custom Object

1. On the **Object Manager** page, look to the right side of the screen.
2. **Click on the "Create" dropdown** and select **Custom Object**.

Step 4: Create"Others" Object

1. On the **Custom Object Definition** page, enter the following details:
    a. **Label**:Other
    b. **Plural Label**: Others
    c. **Record Name**: Other
2. **Check the followingboxes**:
    a. **Allow Reports**
    b. **Allow Search**
3. **Click "Save"** to createthe object.

Step 5: Create a Custom Tab for "Others"

1. **Click the "Home" tab** and enter "Tabs" in the Quick Find searchbar.
2. **Select "Tabs"** from the search results.

3.Under **Custom ObjectTabs**, click **New**.
4.For **Object**, select **Others**.
5.For **Tab Style**, selectany icon that represents your object.
6.Leave all other settings as defaults and click **Next**.
7.Click "Next" again, then **Save**.

3.Fields and Relationships

In Salesforce, an object relationship is a two-way association between two objects,allowing users to connect and interact with related data across differentobjects. This relationship is established by creating custom relationship fields on an object. These relationship fields enable users to view records and seamlessly access related information, providinga comprehensive view of data across the Salesforce environment.

By using relationships, Salesforce ensures that all related data is interconnected, making it easier for users to navigate betweenrelated records, improvingdata consistency, and enhancing the overall user experience.

3.1.Fields in the "Our Customers" Object

The following fields are definedin the "Our Customers" object,each with aspecific data type:

S No	Field Label	Data Type
1	Customer id	Auto Number
2	Customer Name	Text
3	Mobile Number	Phone
4	Email id	Email
5	Address	Text Area
6	Additional Information	Text Area

3.2Fields in Consultants objects

The following fieldsare defined in the "Consultants" object,each with a specific datatype:

S No	Field Label	Data Type
1	Customer id	Auto Number
2	Customer Name	Text
3	Mobile Number	Phone
4	Email id	Email
5	Delivery Type 1)Self Pickup 2)Courier	Picklist
6	Products 1)Lipstick	

	2)Compact 3)EyeLiner 4)FacePack 5)Lip Balm 6)Nail Polish	Multi-Picklist
7	Payment 1)Debit Card 2)Credit Card 3)UPI 4)Cash	Picklist
8	Customer details	Lookup(Our Customers Object)
9	Address	Text Long

3.3 Fields in Retailers objects

The following fields are definedin the "Retailers" object, each with a specific data type:

S No	Field Label	Data Type
1	Customer id	Auto Number
2	Customer Name	Text
3	Mobile Number	Phone
4	Email id	Email
5	Delivery Type 1)Self Pickup 2)Courier	Picklist
6	Products 1)Lipstick 2)Compact 3)EyeLiner 4)FacePack 5)Lip Balm	Multi-Picklist

	6)Nail Polish	
7	Payment 1)Debit Card 2)Credit Card 3)UPI 4)Cash	Picklist
8	Customer Details	Master-Detail Relationship (Our Customers Object)

3.4 Fields in Others objects

The following fields are defined in the "Others" object, each with a specific data type

S No	Field Label	Data Type
1	Name	Text
2	Employee 1)Company Employee 2)Staff 3)Special Reference	Picklist
3	Coupon	Text
4	Products 1)Lipstick 2)Compact 3)EyeLiner 4)FacePack 5)Lip Balm 6)Nail Polish	Multi-Picklist

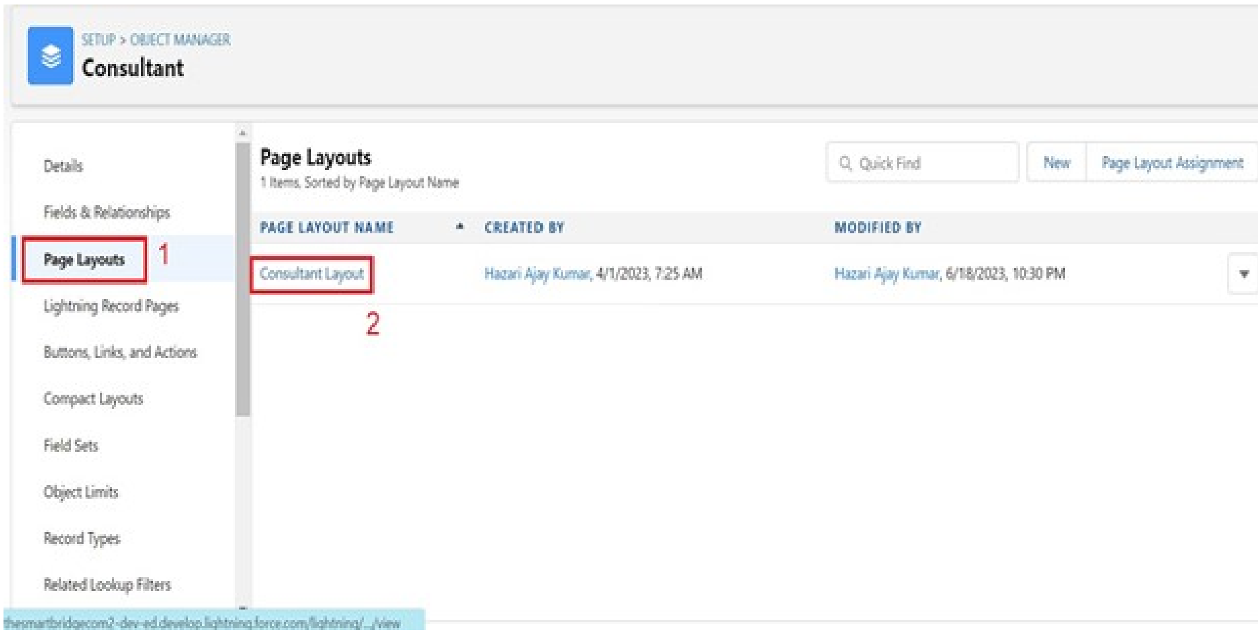
4.Page Layouts

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 interfaceand tailor it to meet the specificneeds of your organization.

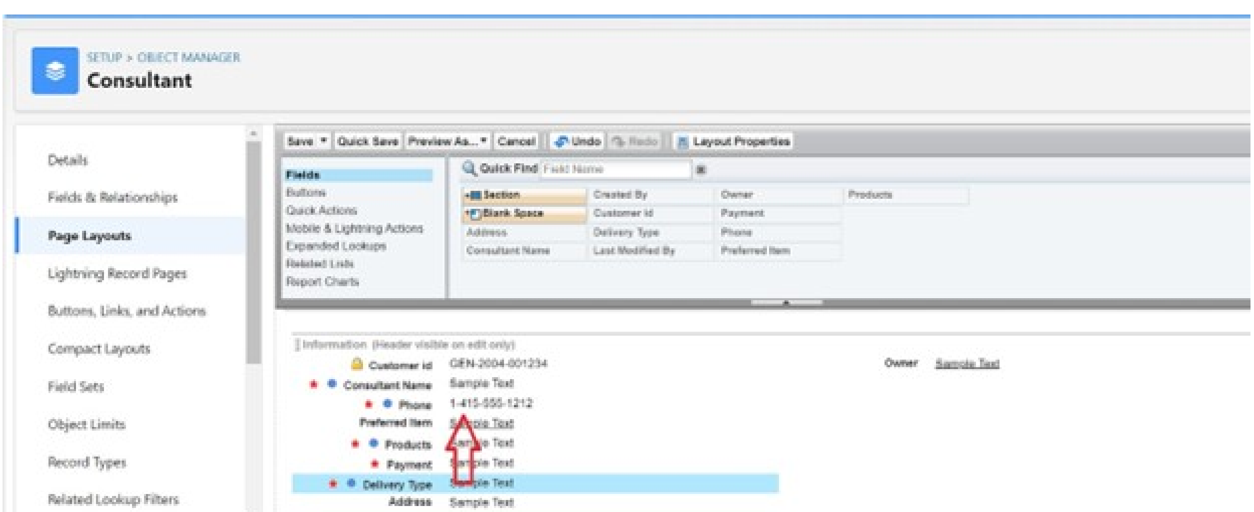
Page LayoutCreation

1. From the Salesforce setup menu, go to **"Object Manager"** and select the **Consultants** object.
2. Click on **"PageLayouts"** in the left sidebar.This will displaya list of available pagelayouts for the selected object.

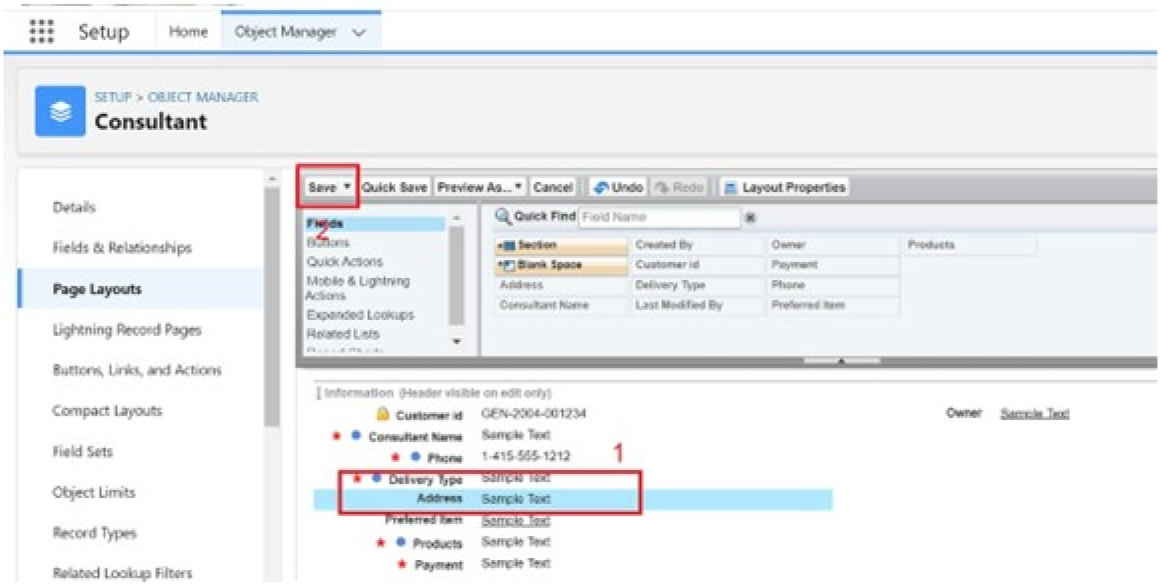
3. Select the **Consultant Layout**page layout



4. Click and drag the **DeliveryType** and **Address** fieldsbelow the **Phone** field.



5. Click on **Save**.



5.The LightningApp

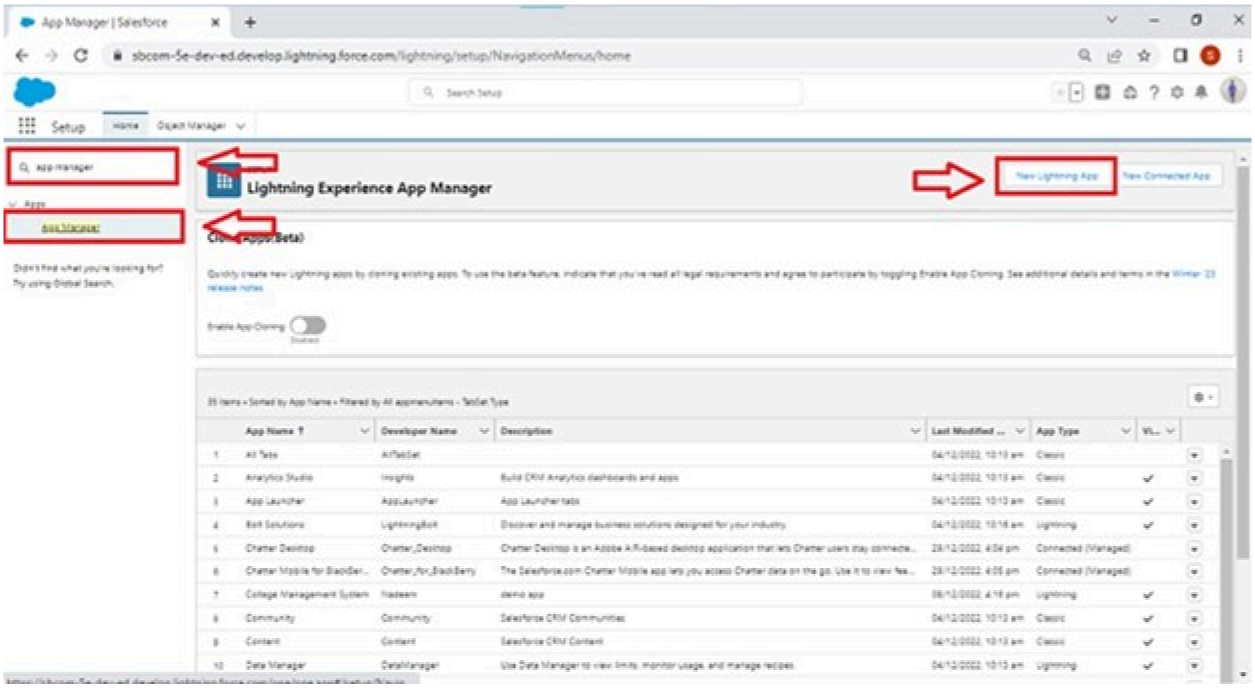
An app is a collection of items that work together to serve a particular function.In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundlein the navigation bar.

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. Members of your org can work more efficiently by easily switchingbetween apps.

5.1Create a Lightning App

To create a Lightningapp page:

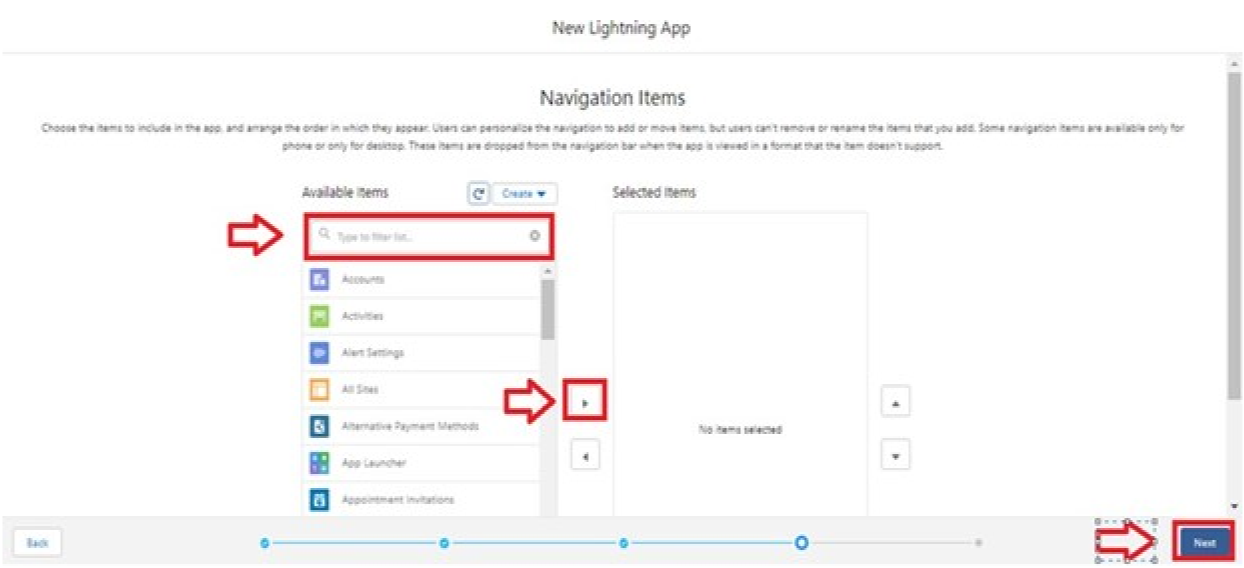
i. Go to the **Setup** page.
ii. In the **Quick Find** search bar, type **"App Manager"**and select **"App Manager."**
iii. Click on **New LightningApp**.
    1. Fill the app name as **Urban Color** in **App Detailsand Branding**.
    2. Click **Next**.
    3. On the **App Options** page, keep the settingsas default.
    4. Click **Next**.
    5. On the **UtilityItems** page, keep the settingsas default.
    6. Click **Next**.



To Add Navigation Items:

1. Select the items **(Our Customers, Consultants, Retailers, Others, Reports,Dashboards)**

   from the search bar and move them usingthe arrow button.
2. Click **Next**.

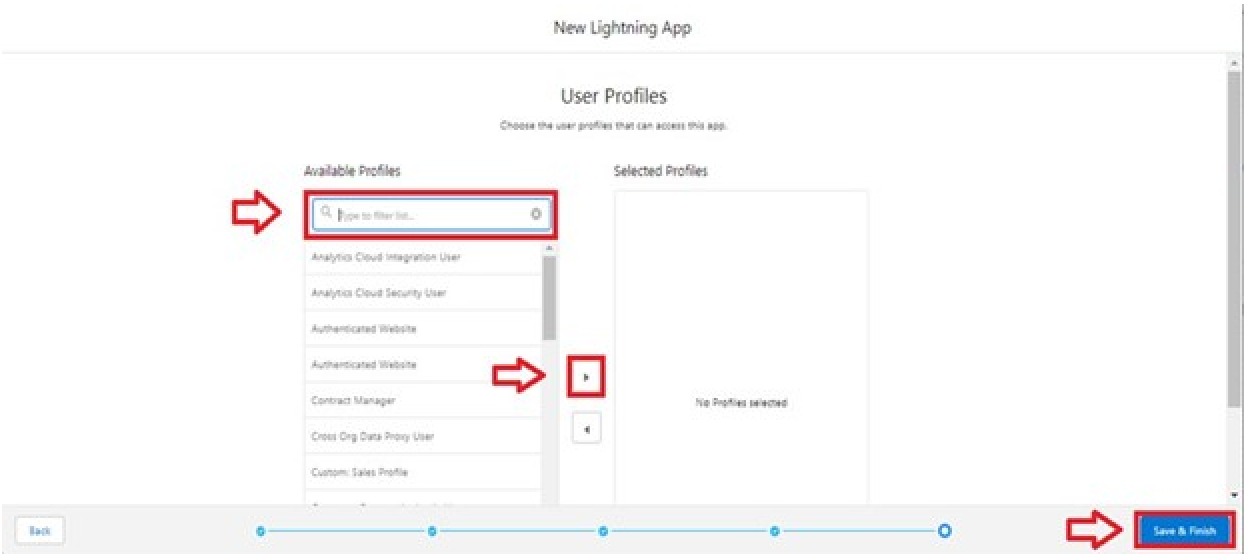


To Add User Profiles:

1. Search for **profiles (System Administrator)** in the searchbar.

2. Click on the arrow button to add the profile.

3. Click **Save & Finish**.



6.Profile

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

6.1Creating a Profile

Creating a Store Supervisor Profile and SettingObject Permissions:

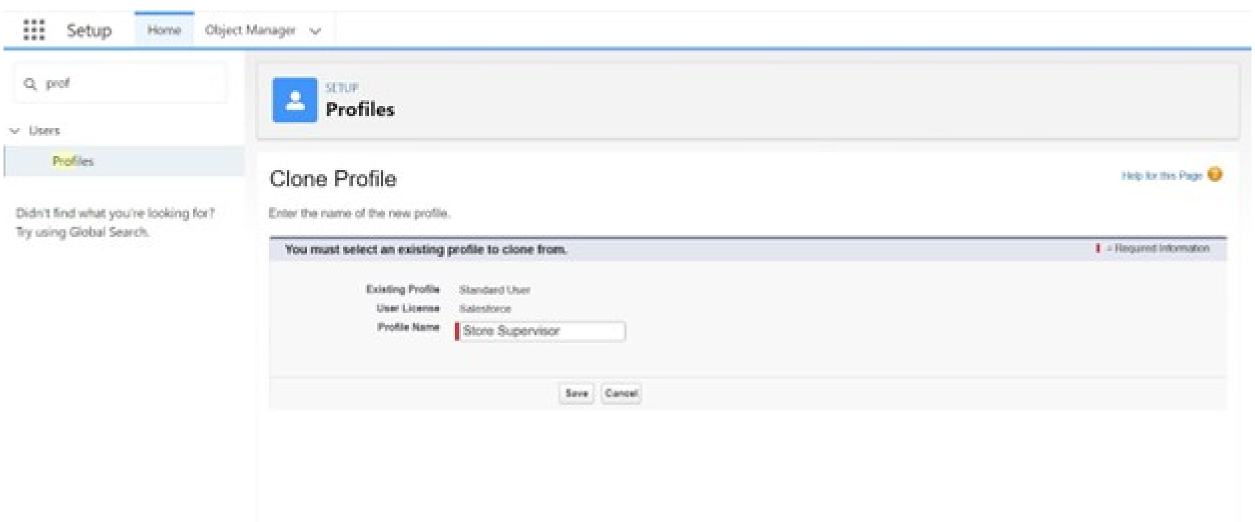
i. From **Setup**, enter **Profiles**in the **Quick Find** box, and select **Profiles**.

ii. From the list of profiles,find **Standard User**.

iii. Click **Clone**.

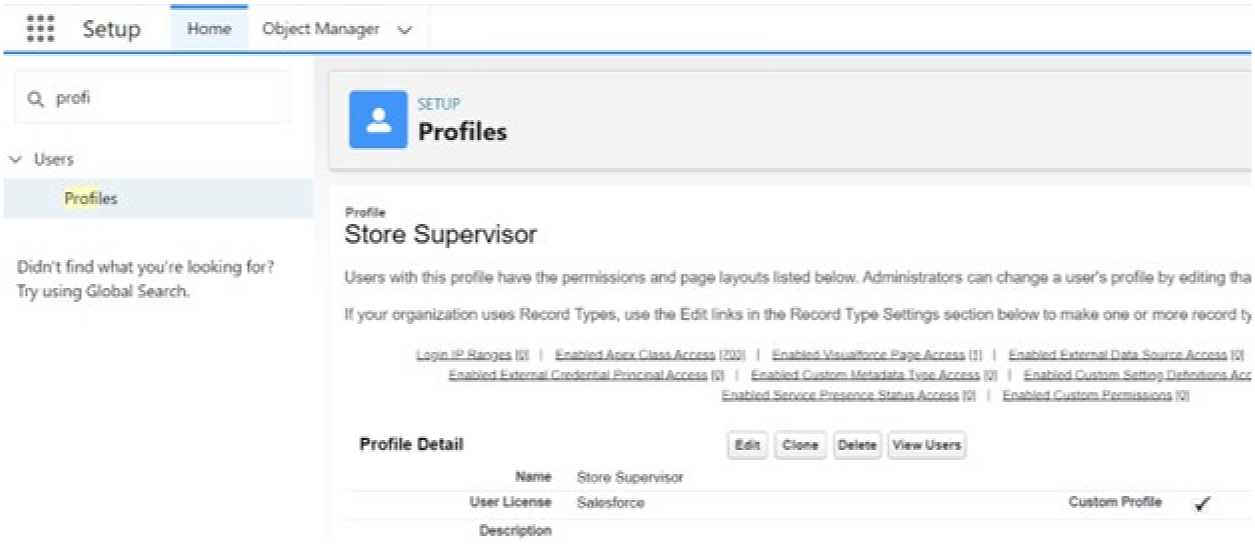
iv. For **Profile Name**, enter**Store Supervisor**.

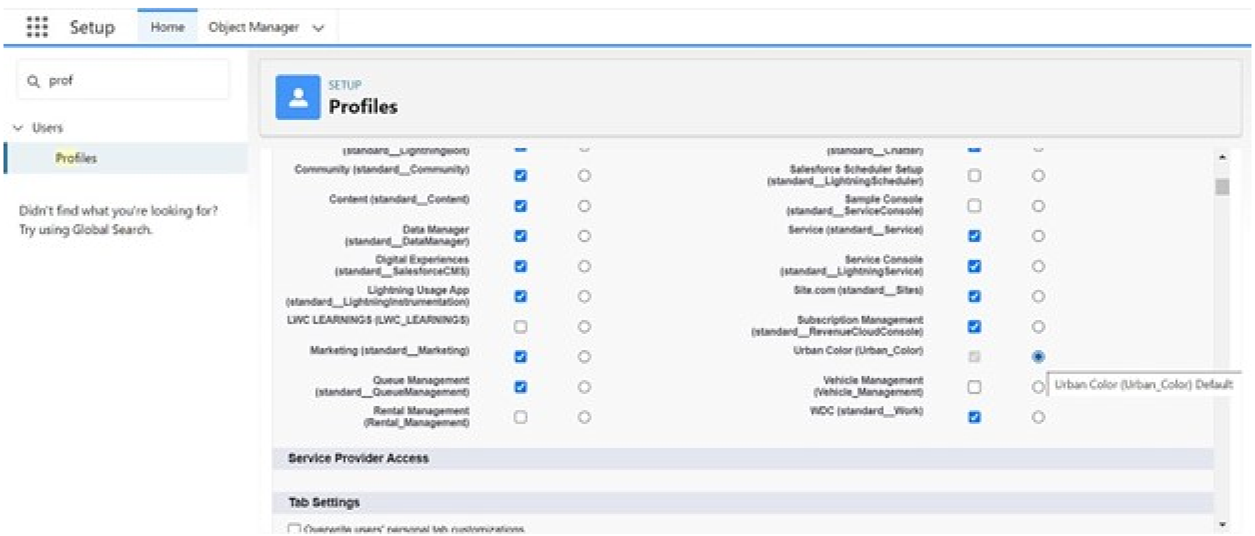
v. Click **Save**.



6.While still on the **Store Supervisor** profile page, click **Edit**.

7.Scroll down to **Custom Object Permissions** and give access for **Create, Read, Edit, Delete, View All, and Modify All** for the **Our Customers, Consultants, Retailers, Others** objects.



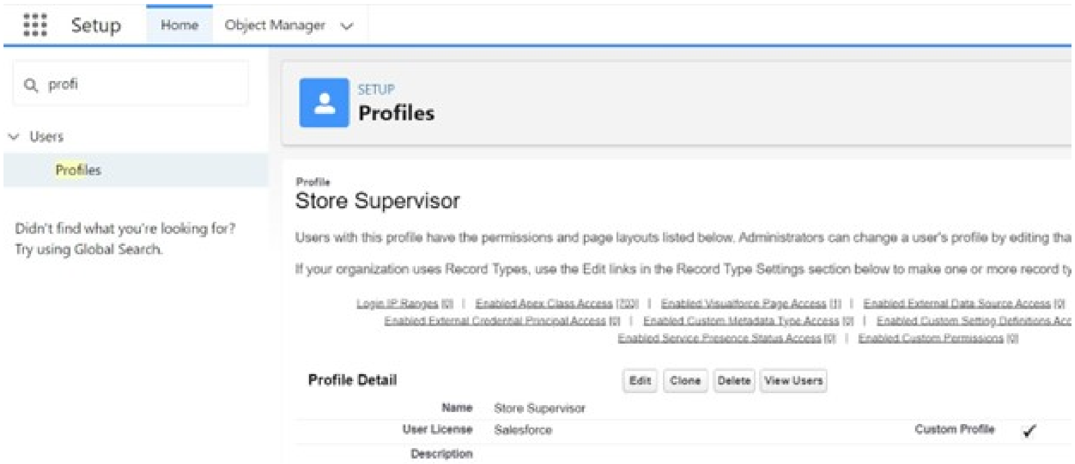


8.Scroll down to **Custom App Settings** andgive access to **Urban Color**.

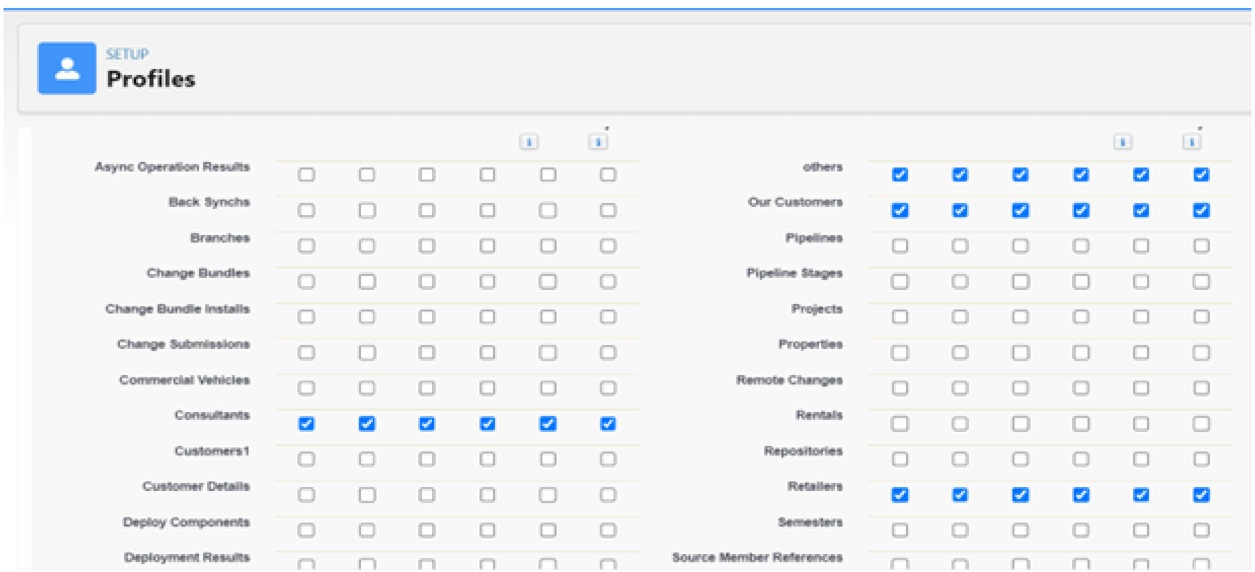
9.Click on **Save**.

To Createa New Profile:

1.Go to **Setup**.
2.Type **Profiles** in the **Quick Find** box.
3.Click on **Profiles**.
4.Clone the desiredprofile (**Standard User** is preferable).
5.Enter the **Profile Name**.
6.Click **Save**.
7.While still on the profilepage, click **Edit**.

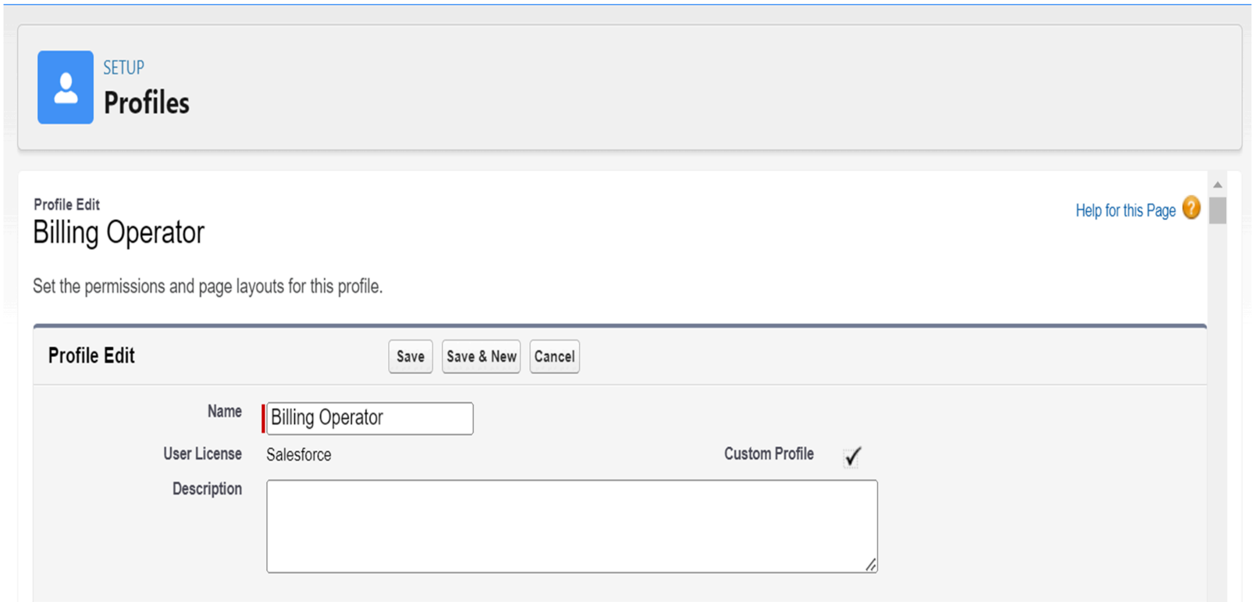


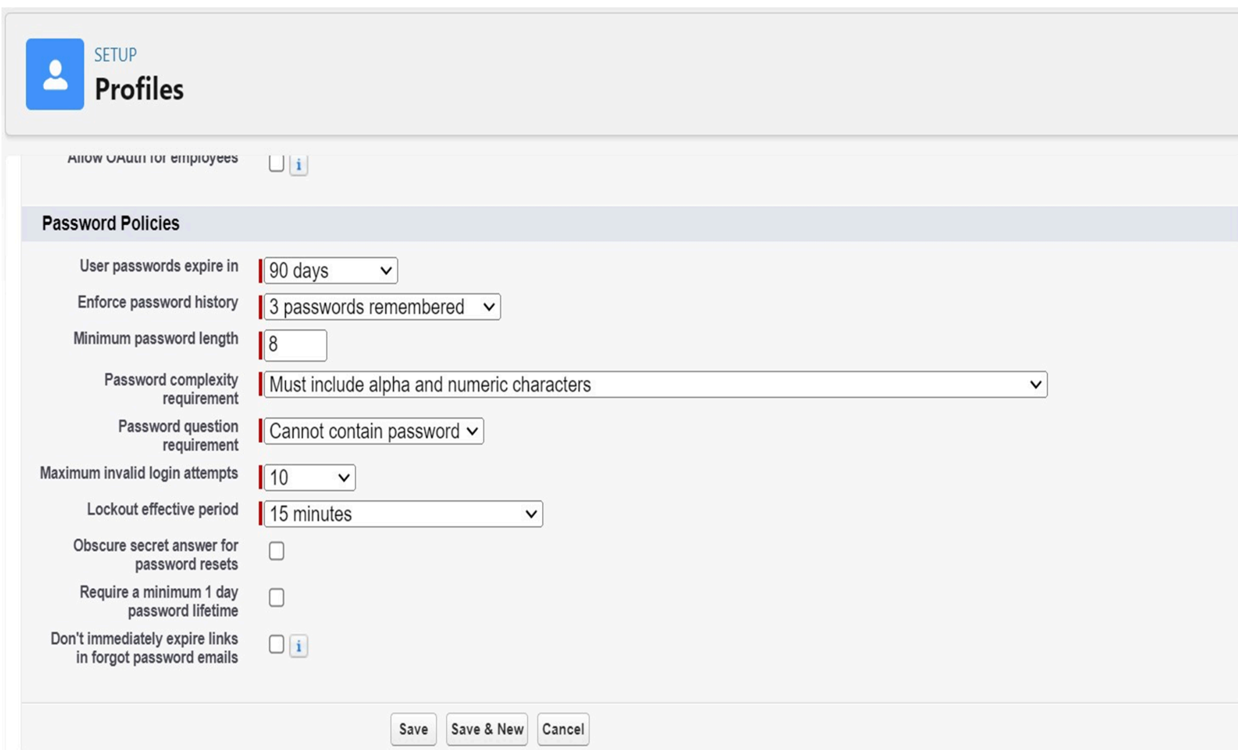
8. Scroll down to the **Custom Object Permissions** and give all access to the **Consultants, Others,Our Customers, Retailers**objects.
9. Click on **Save**.



Similarly, Create an Operator Profile:

1. Clone the **SalesforcePlatform** user profile.
2. Give access only for **Billing Operator**.





3. Click on **Save**.

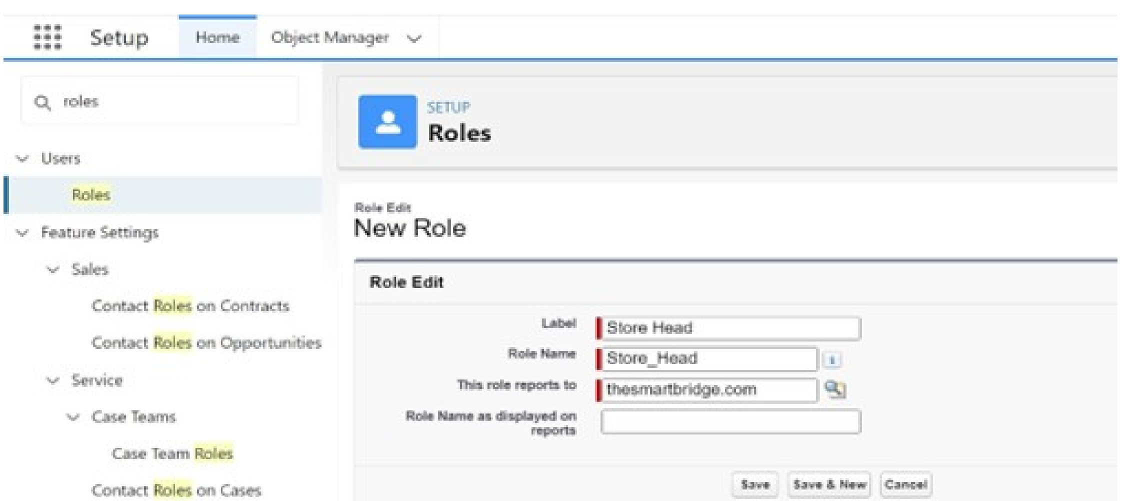
7.Setup Roles

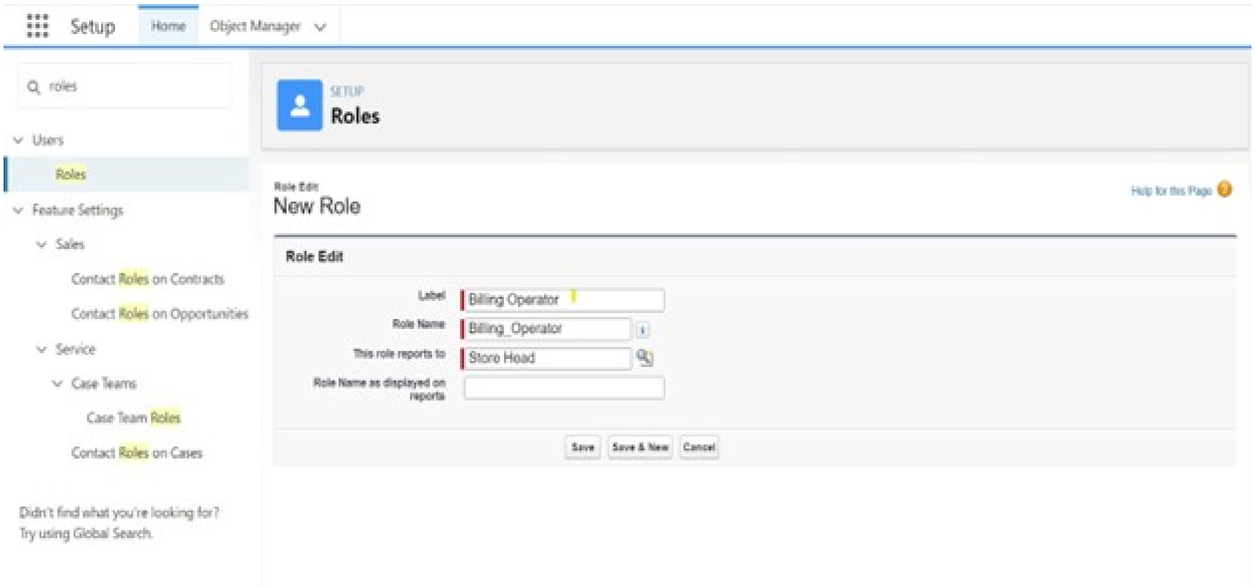
Roles are record-level access controls that define what data a user can see inSalesforce.

Setup Roles

1. Click on the **Gear Icon**.
2. Click **Setup**.
3. In the **Quick Find** box, enter **Roles**.
4. Click **Roles**.
5. Click on **Set Up Roles**.
6. Click **Expand All**.
7. Under the **CEO**, clickon **Add Role**.
8. Fill in the **Label** as **Store Head**,and the **Role Name** as **Store_Head**.
9. Enter a **Role Name** that will be displayedon reports.
10. Click on **Save**.

Similarly, create one role underStore Head as Billing Operator.

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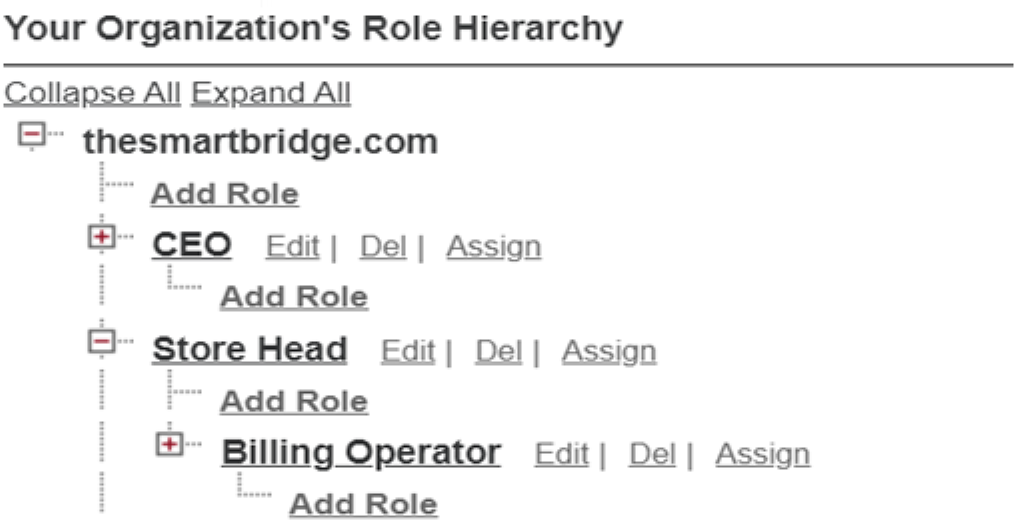
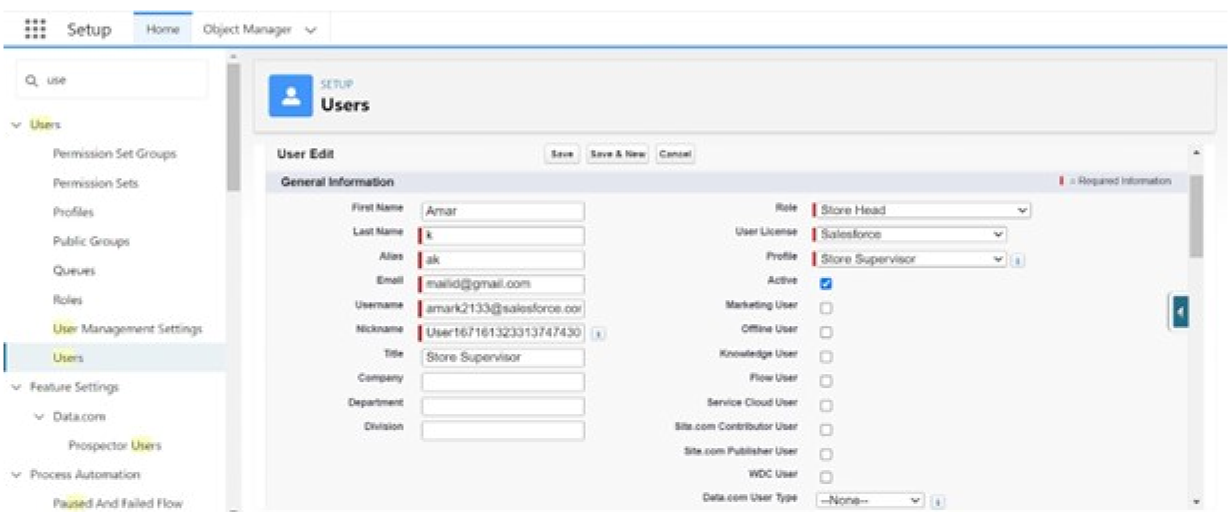

Your Organization's Role Hierarchy
Collapse All Expand All
thesmartbridge.com
Add Role
CEO Edit | Del | Assign
Add Role
Store Head Edit | Del | Assign
Add Role
Billing Operator Edit | Del | Assign
Add Role

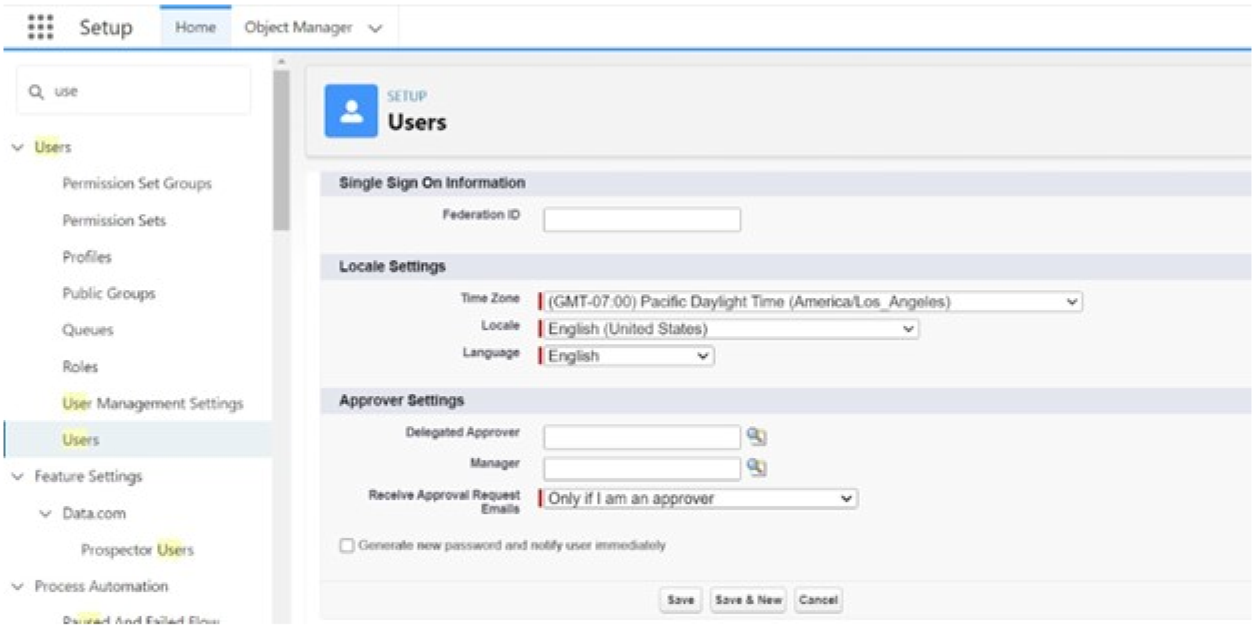
8.Users

Auser is anyone who logs in to Salesforce. Users are employeesat your company, suchas sales reps, managers, and IT specialists, who need accessto the company's records. Every user in Salesforce has a user account.

Creating a User:

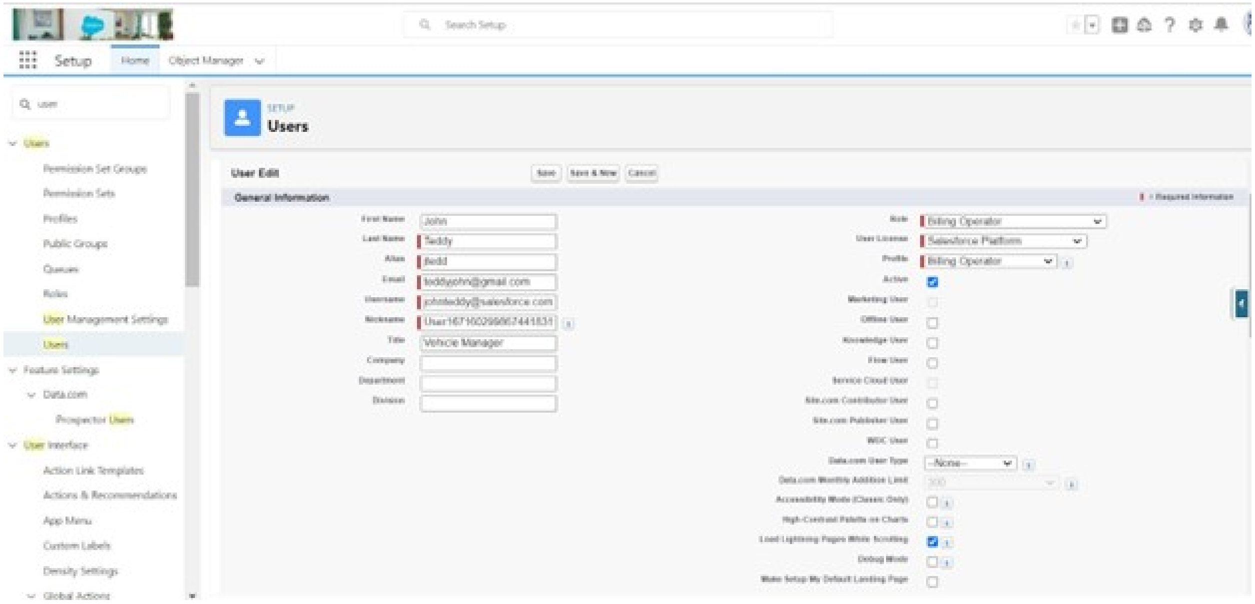
1. From **Setup**, in the **Quick Find** box, enter **Users**,and then select**Users**.
2. Click **New User**.
3. Enter the user's name as **Amar K** and your email address,and create a unique usernamein the form of an email address. By default, the username is the same as the email address.
4. Select a **Role** as**Store Head**.
5. Select a **User License**as **Salesforce**.
6. Select a **Profile** as **Store Supervisor**.
7. Check **Generate new password and notify the user immediately** to have the user's login name and a temporary password emailed to your email.
8. Fill in the fields (First Name, Last Name, Alias, Email ID, Username, Nickname, Role, User License, Profile).
9. Click **Save**.





Second User Creation:

1. From **Setup**, in the **Quick Find** box, enter **Users**,and then select**Users**.
2. Click **New User**.
3. Enter the user's name as **John Teddy** and your email address, and create a unique username in the form of an email address.By default, the username is the same as theemail address.
4. Select a **Role** as**Billing Operator**.
5. Select a **User License**as **Salesforce Platform**.
6. Select a **Profile** as **BillingOperator**.
7. Check **Generate new password and notify the user immediately** to have the user's login name and a temporary password emailed to your email.
8. Fill in the fields (First Name, Last Name, Alias, Email ID, Username, Nickname, Role, User License, Profile).
9. Click **Save**.



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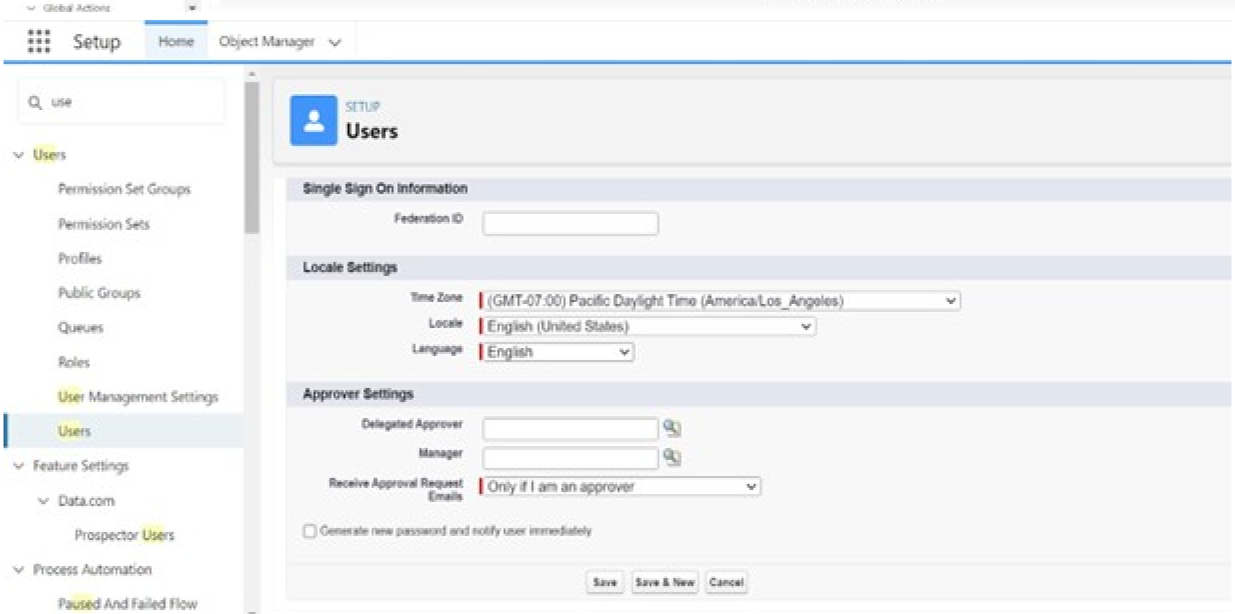
Debug Mode
Make Setup My Default Landing Page



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Language
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Manager
Receive Approval Request Emails
Only if I am an approver
Generate new password and notify user immediately
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Save & New
Cancel

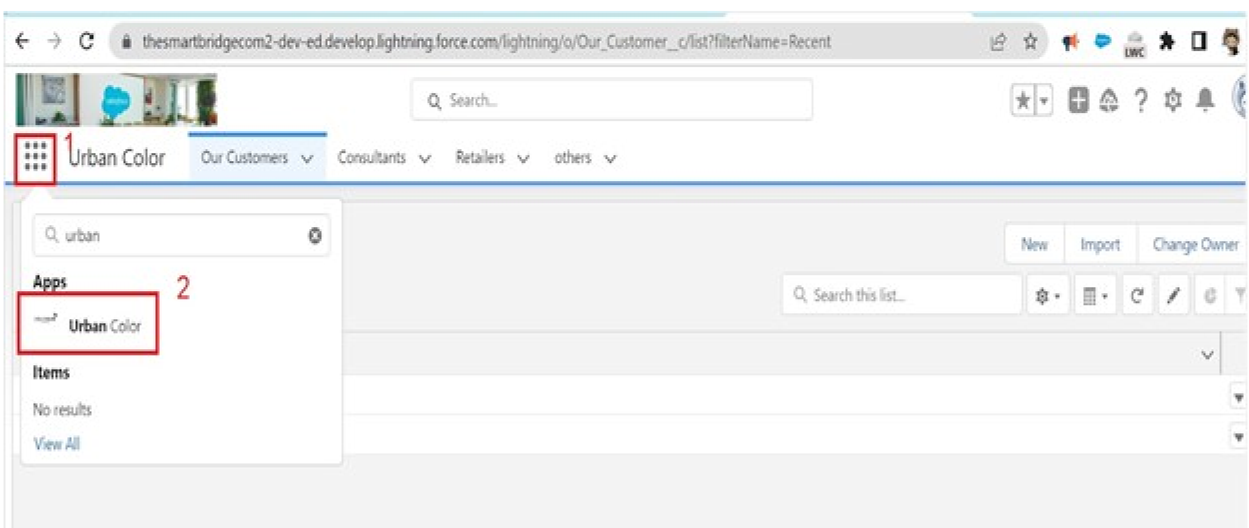
9.User Adoption

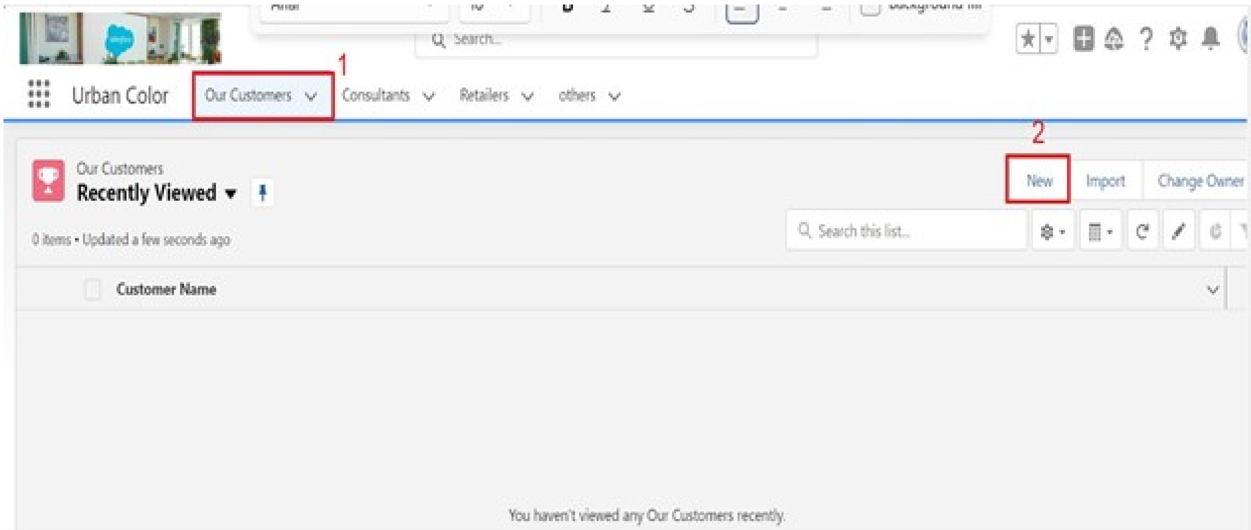
We need to understand user adoption and navigation. How to interact with database and their records.

To ensureeffective **user adoption** andnavigation, it's importantto educate users on how to interact with the Salesforce database and manage records. The following steps outline key areas to focus on:

Create Our Customer Record

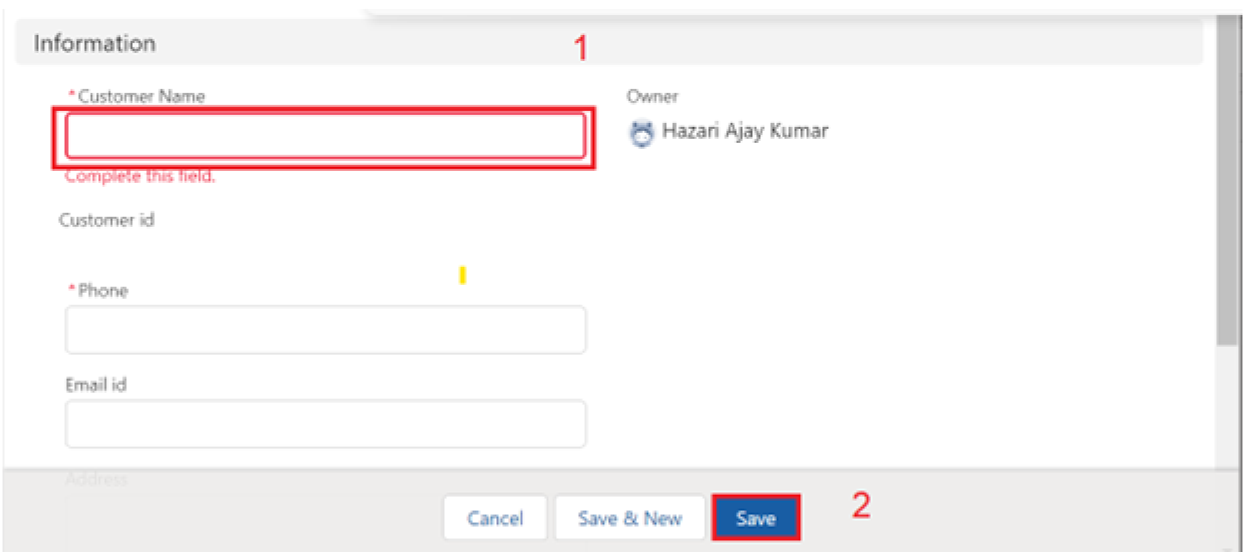
1. Click on the **App Launcher**on the left side of the screen.
2. Search for **Urban Color** and clickon it.
3. Click on the **Our Customer** tab.
4. Click the **New** button.
5. Fill in all the **Our Customer**record details.
6. Click on the **Save** button.

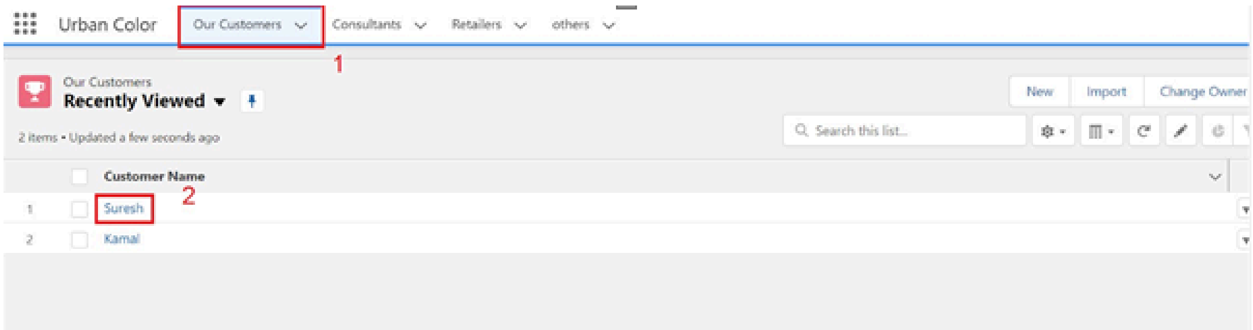


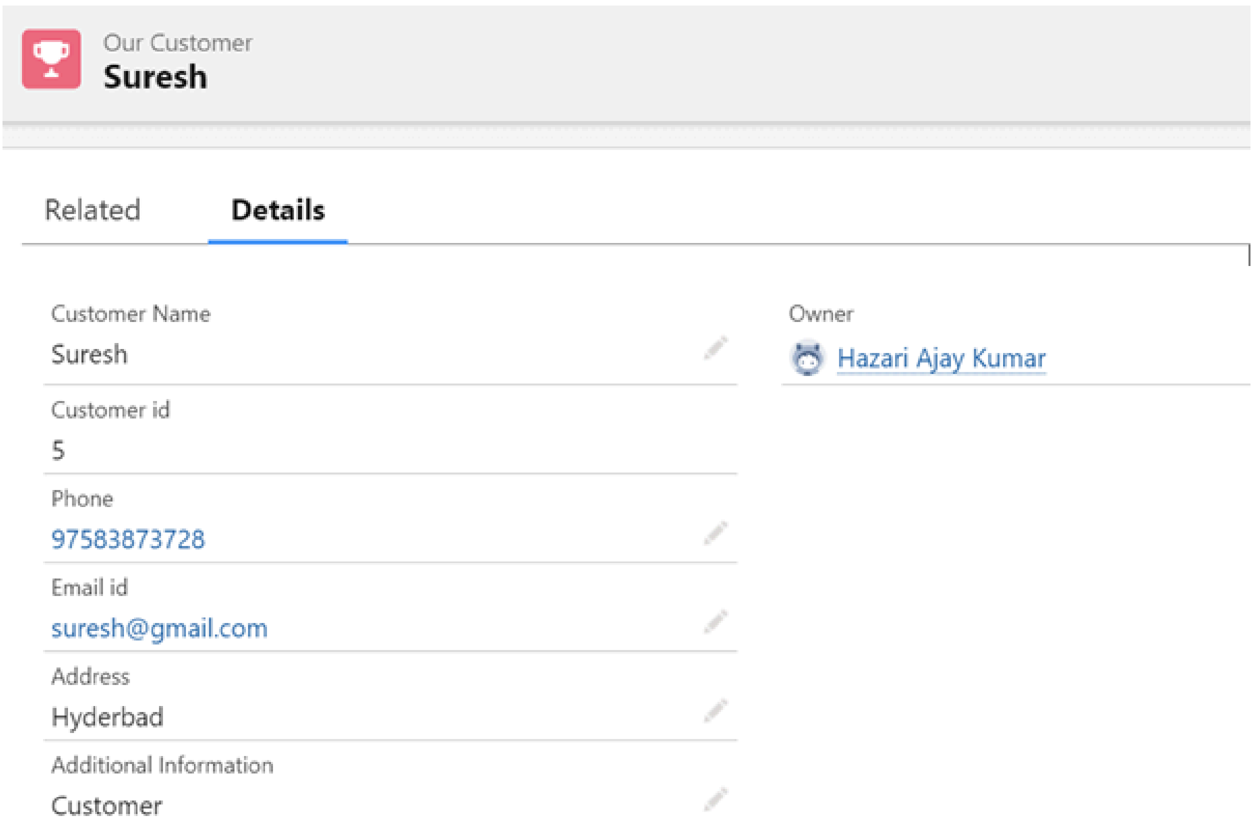


View Record (Our Customer)

1. Click on the **App Launcher**on the left side of the screen.
2. Search for **Urban Color** andclick on it.
3. Click on the **Our Customer** tab.
4. Click on any **record name** to view the details of the **Our Customer**.

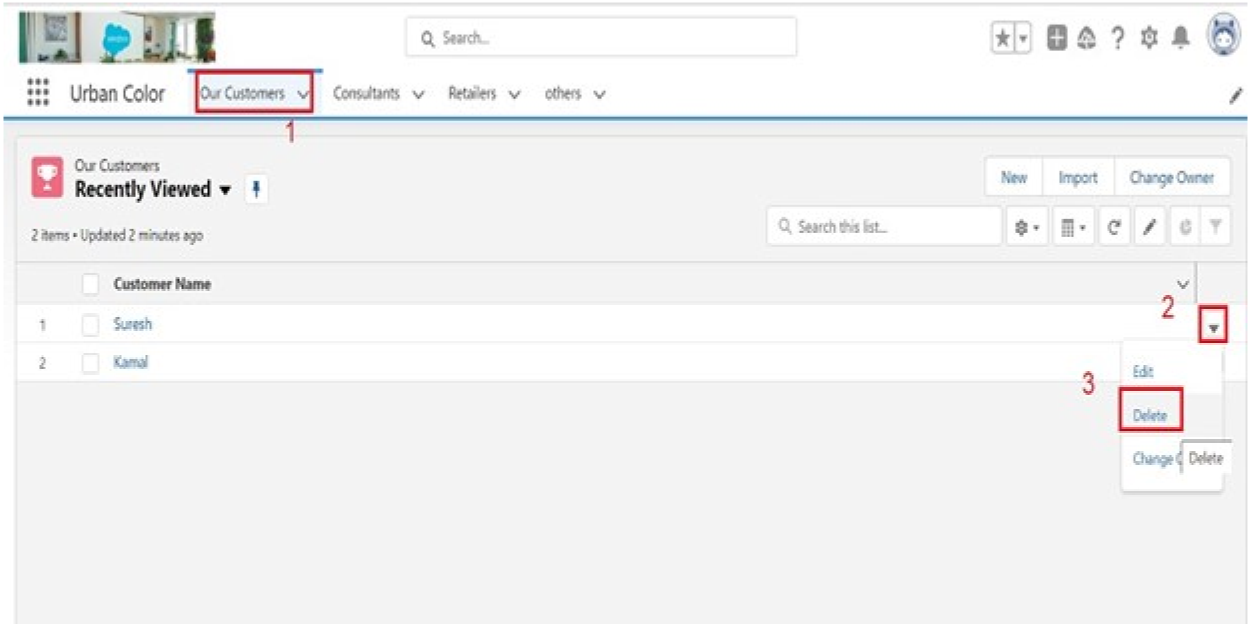


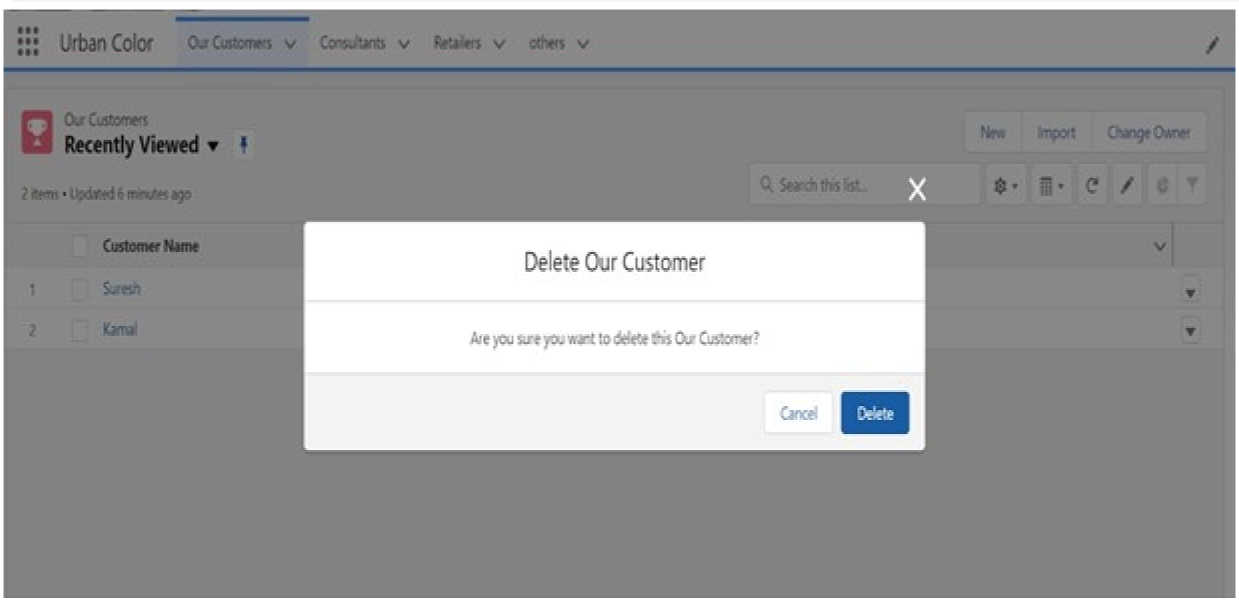




Delete Record (Our Customer)

1. Click on the **App Launcher**on the left side of the screen.
2. Search for **Urban Color** and clickon it.
3. Click on the **Our Customer**tab.
4. Click on the **Arrow** on the right-hand side of the particular record.
5. Click **Delete**, and then confirm by clicking **Delete** again.


Search...
Urban Color
Our Customers
Consultants
Retailers
others
1
Our Customers
Recently Viewed
New
Import
Change Owner
Search this list...
2 items • Updated 2 minutes ago
Customer Name
2
1 Suresh
2 Kamal
Edit
3
Delete
Change O
Delete

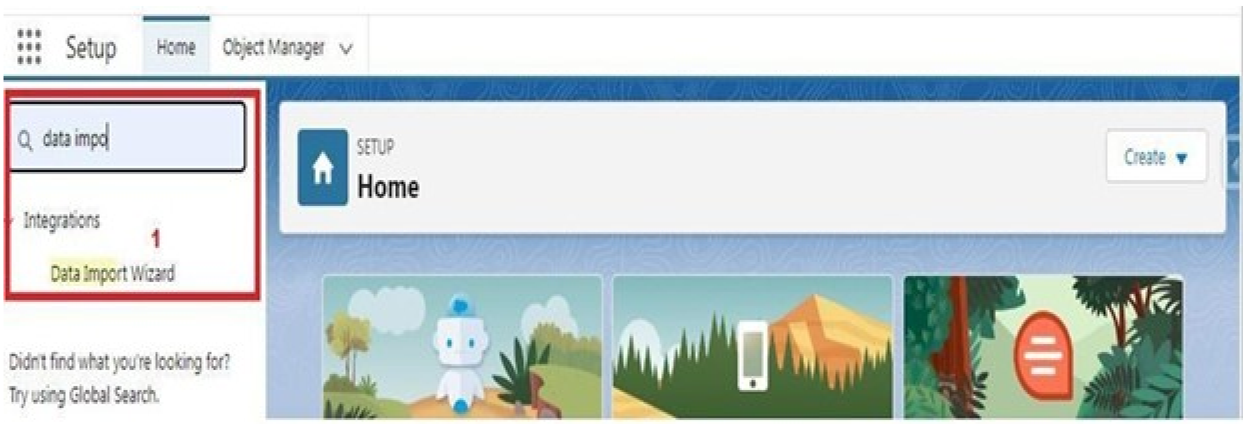

Urban Color
Our Customers
Consultants
Retailers
others
Our Customers
Recently Viewed
New
Import
Change Owner
Search this list...
2 items • Updated 6 minutes ago
Customer Name
1 Suresh
2 Kamal
Delete Our Customer
Are you sure you want to delete this Our Customer?
Cancel
Delete

10. ImportData

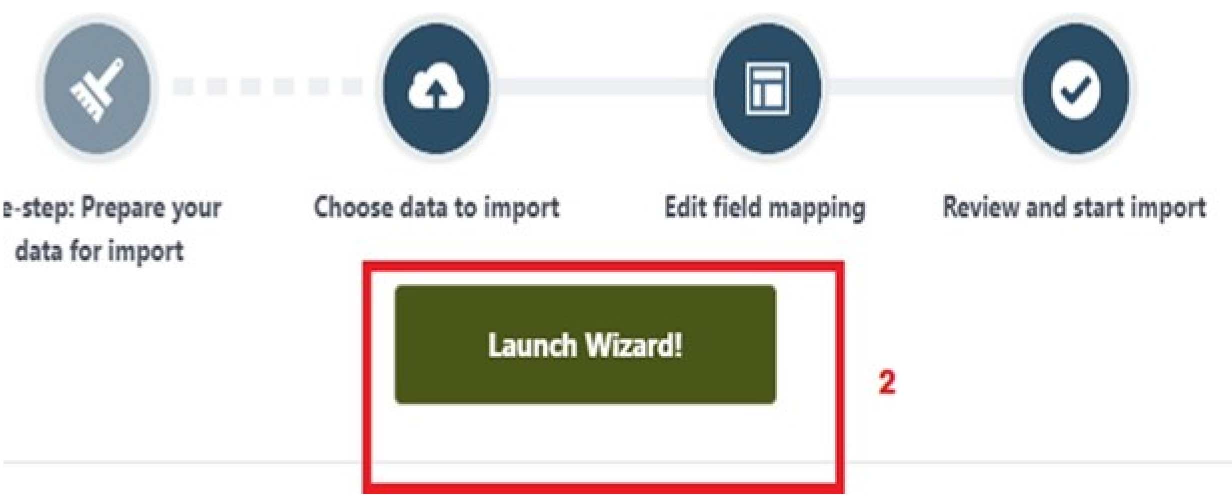
Data Import Wizard—This tool, accessible through the **Setup** menu,allows you to importdata into common standard objects such as **Contacts, Leads, Accounts**, as well as data into custom objects.

To ImportData

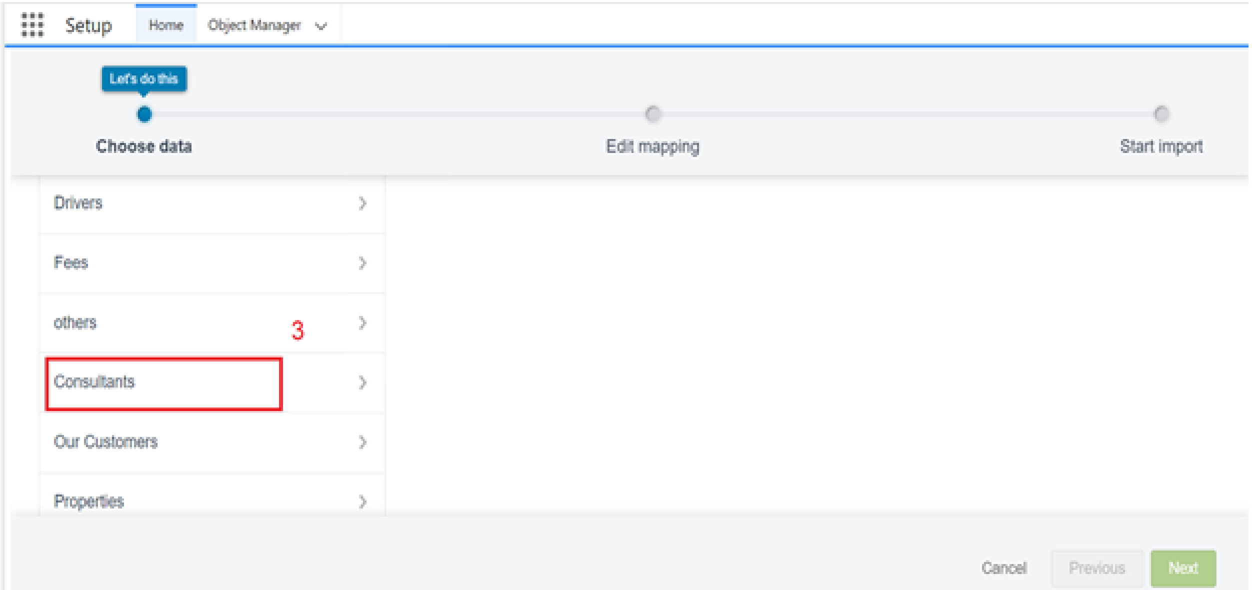
1. From **Setup**, clickthe **Home** tab.
2. In the **Quick Find** box, enter**Data Import** and select**Data Import Wizard**.



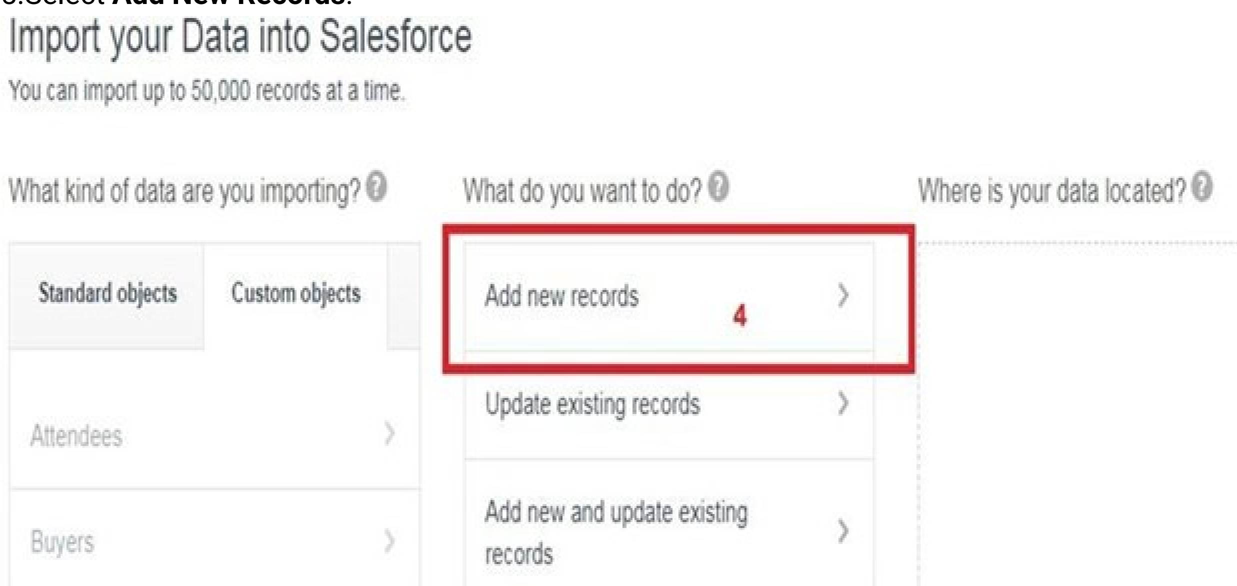
3. Click **Launch Wizard!**



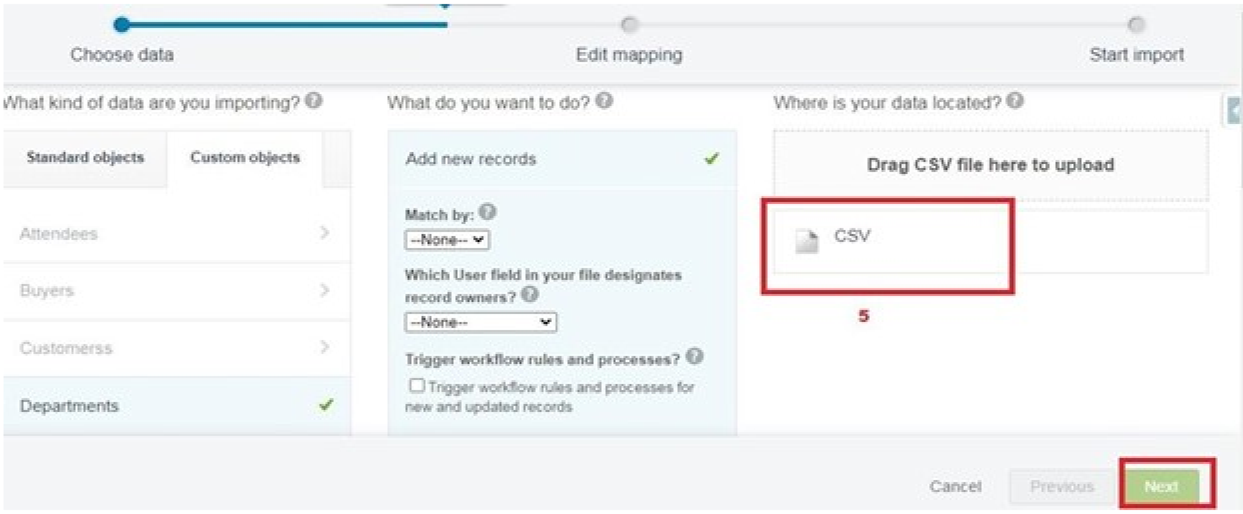
4.Click the **Custom Objects** taband select the **Consultant**object



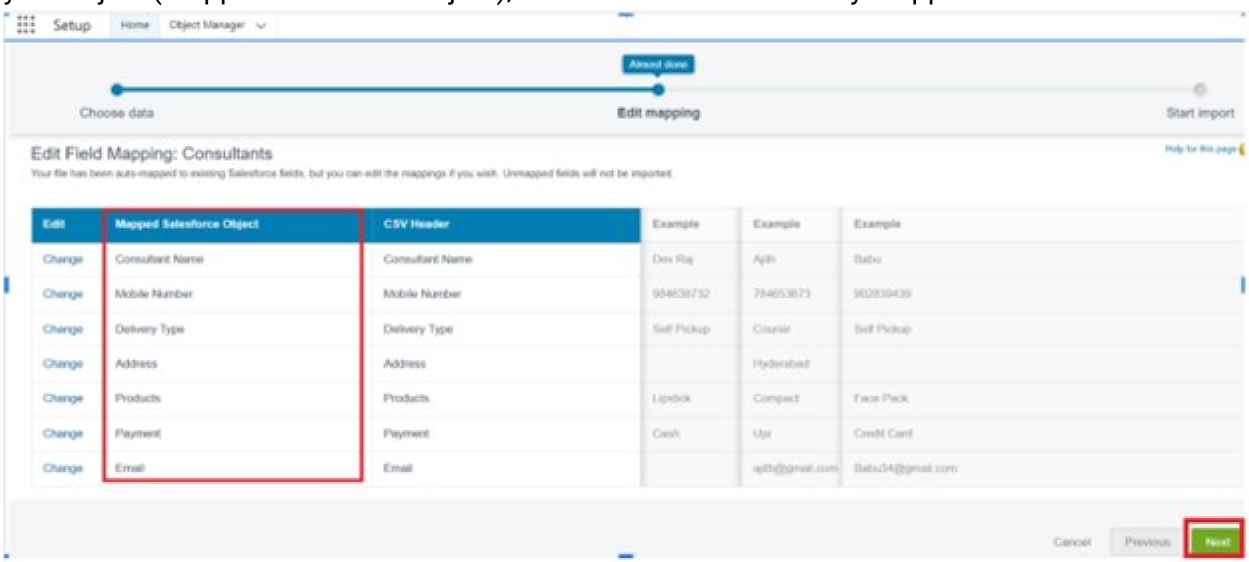
5.Select **Add New Records**.



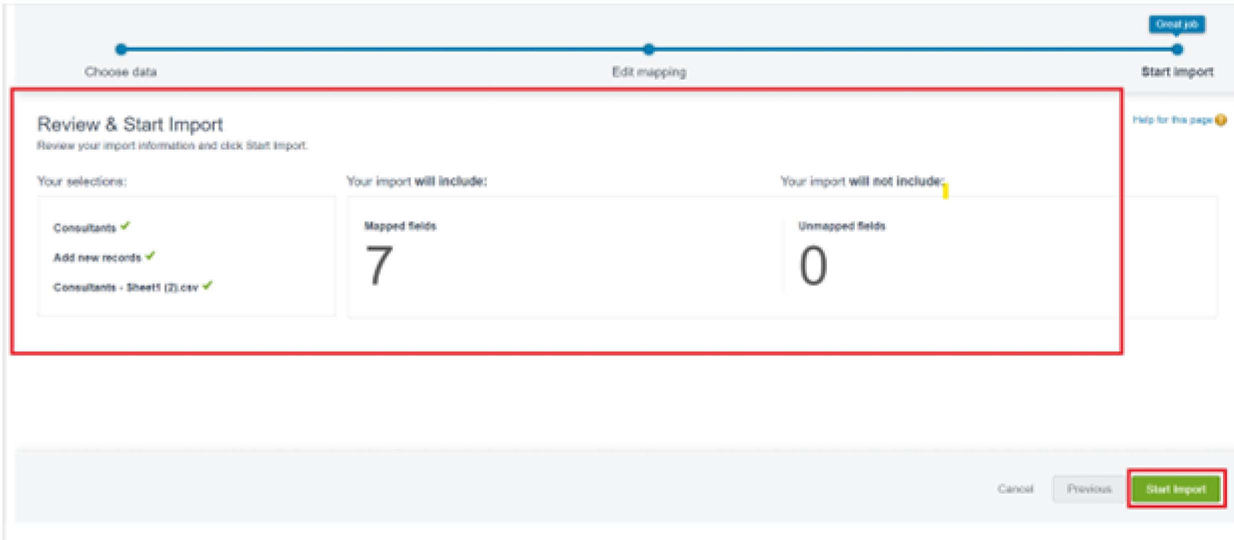
6.Click **CSV** andchoose the file **Consultant_CSV** which was createdearlier. Click **Next**.



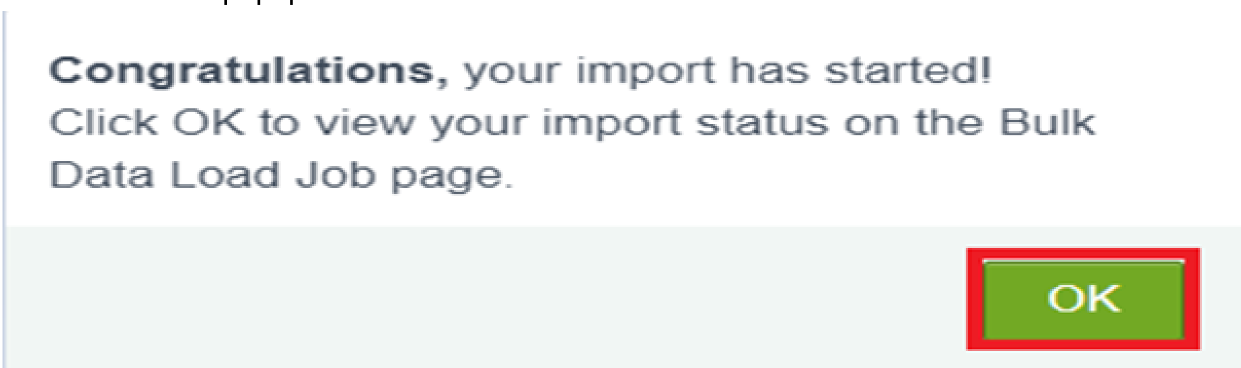
7.Since the field names in the CSV file (CSV Header) are the same as the field names in your object (MappedSalesforce Object), the fields are automatically mapped.Click **Next**.



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



9.Click **OK** onthe popup.



10.Scroll down the page and verifythat your data has been imported under **Batches**.

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	7512w00000Xqrar	6/19/2023, 11:05 PM	6/19/2023, 11:05 PM	103	52	0	9	0	0		Completed

11.Make sure you have **0 records** underthe **Records Failed** column.

Note: Perform **Field Mapping** carefully.

Here is the formatted text for your document:

11.What are Reports?

Reports

Reports in Salesforce are lists of records that meet specificcriteria, providing answersto particular questions. These records are displayed in a table format that can be filtered or grouped based on any field.

There are 4 types of report formats in Salesforce:

1. **Tabular Reports:**
    a. The most basic report format,displaying rows of records in a table with a grandtotal.
    b. Easy to set up but cannot be used to create groupsof data or charts and cannotbe used in Dashboards.
    c. Primarily used to generate simplelists or lists with a grand total.
2. **Summary Reports:**
    a. The most commonlyused report format,allowing the groupingof rows of data,viewingsubtotals, and creatingcharts.
3. **Matrix Reports:**
    a. The most complex reportformat, summarizing information in a grid format.
    b. Allows records to be grouped by both columnsand rows.
    c. Can be used to generate dashboards and add charts.
4. **Joined Reports:**
    a. Allows the creation of different views of data from multiplereport types.
    b. Data in joinedreports is organizedin blocks, each acting as a subreport with itsown fields, columns,sorting, and filtering.
    c. Used to groupand show data from multiplereport types in different views.

Report Types:

A **Report Type** determines which set of records will be available in a report. Each report is based on a particular report type, selected first when creating a report. Every report type has a primary object and one or more related objects, all of which must be linked together directly or indirectly.

1. A report type cannot include more than 4 objects.
2. Once a report is created, its report type cannot be changed.

There are 2 types of report types:

1. **Standard ReportTypes:**
    a. Automatically included with standard objects and custom objects where "AllowReports" is checked.
    b. Cannot be customized and automatically include standardand custom fields foreach object within the reporttype.
    c. Created when an object or a relationship is created.
    d. **Note:** Standard report types alwayshave inner joins.
2. **Custom Report Types:**
    a. Created by an administrator or user with "Manage Custom Report Types" permission when standardreport types cannotspecify which recordswill beavailable in reports.
    b. Allows specification of objects that will be available in a particular report.
    c. The primary objectmust have a relationship with other objectspresent in thereport type, either directlyor indirectly.

There are 3 typesof access levels for folders:

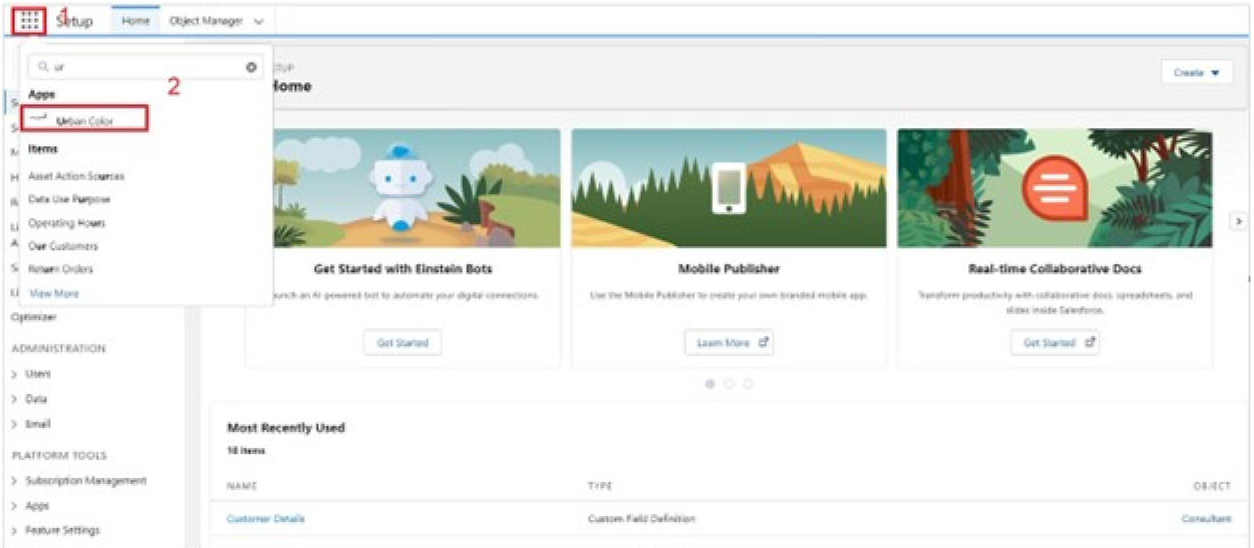
1. **Viewer:**
    a. Users can see the data in a report but cannot make any changesexcept cloning itinto a new report.
2. **Editor:**
    a. Users can view and modifythe reports and move them to/from any other foldersthey have access to as Editor or Manager.
3. **Manager:**
    a. Users can do everything Viewersand Editors can do, plus control other users'accesslevels to the folder.
    b. Managers can also delete the report.

11.1 Create Report

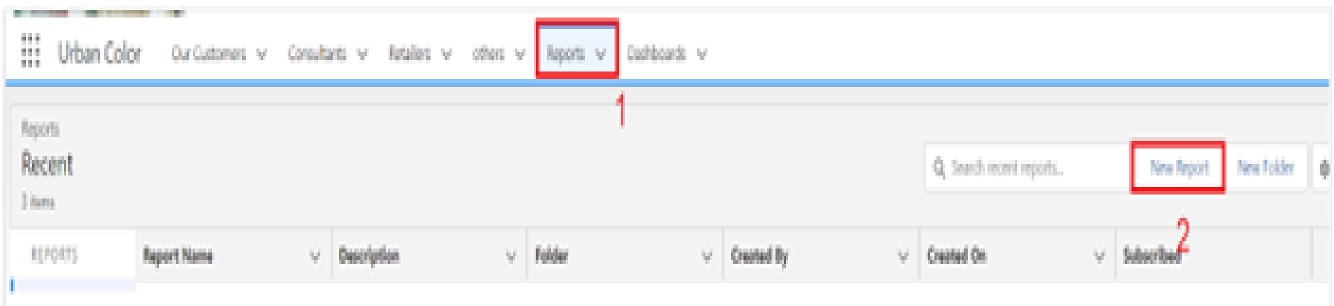
1.Click **App Launcher**.

2.Select **Urban Color App**.

3.Click the **Reports** tab.

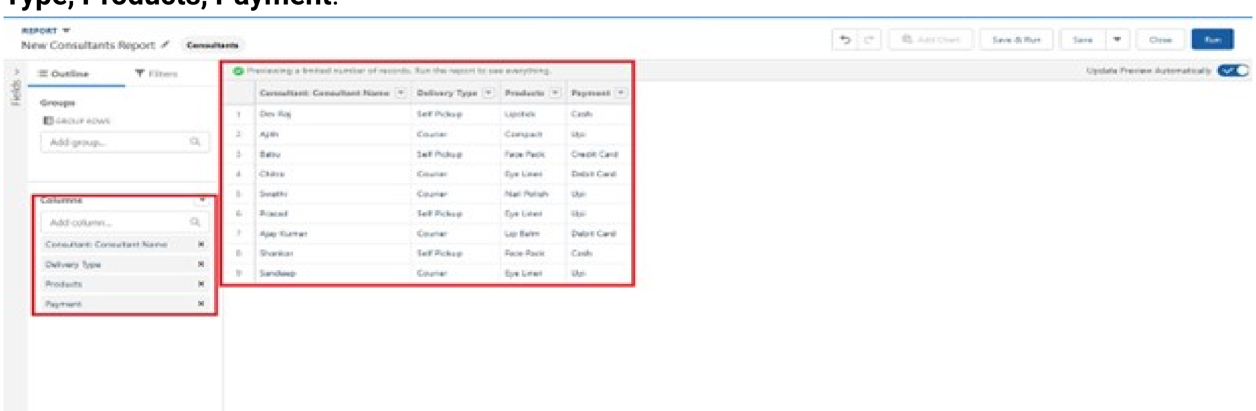


4.Click **New Report**.

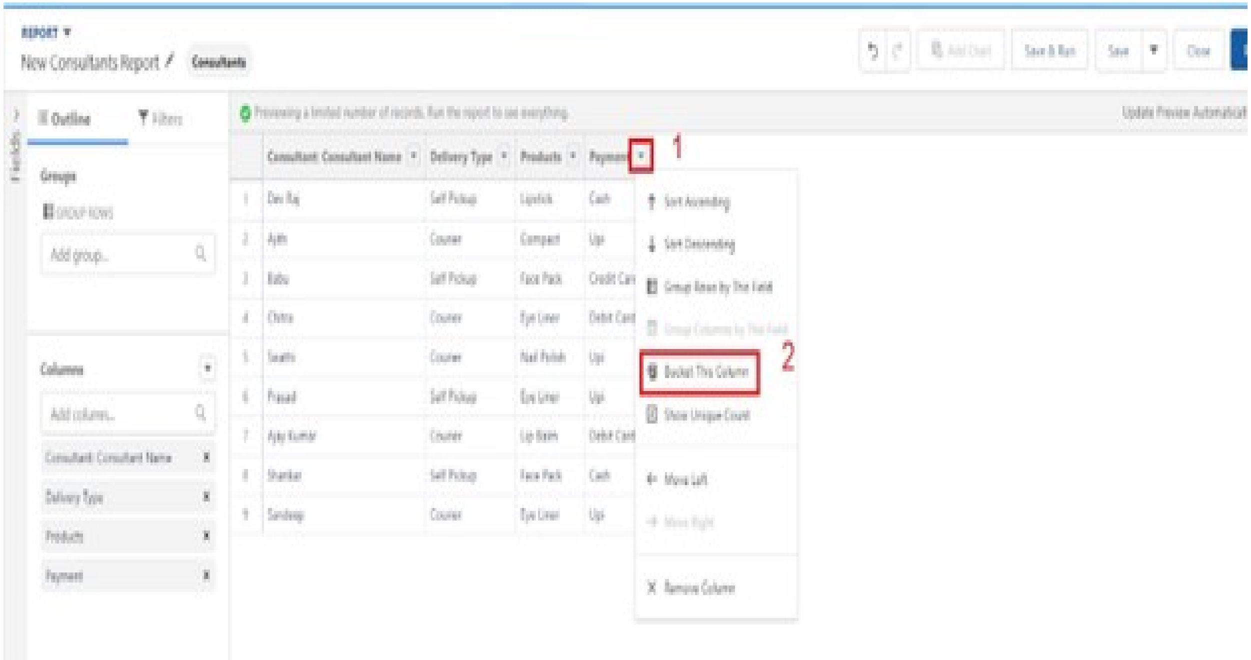


5.Select the report type as **Consultants** andclick **Start Report**.

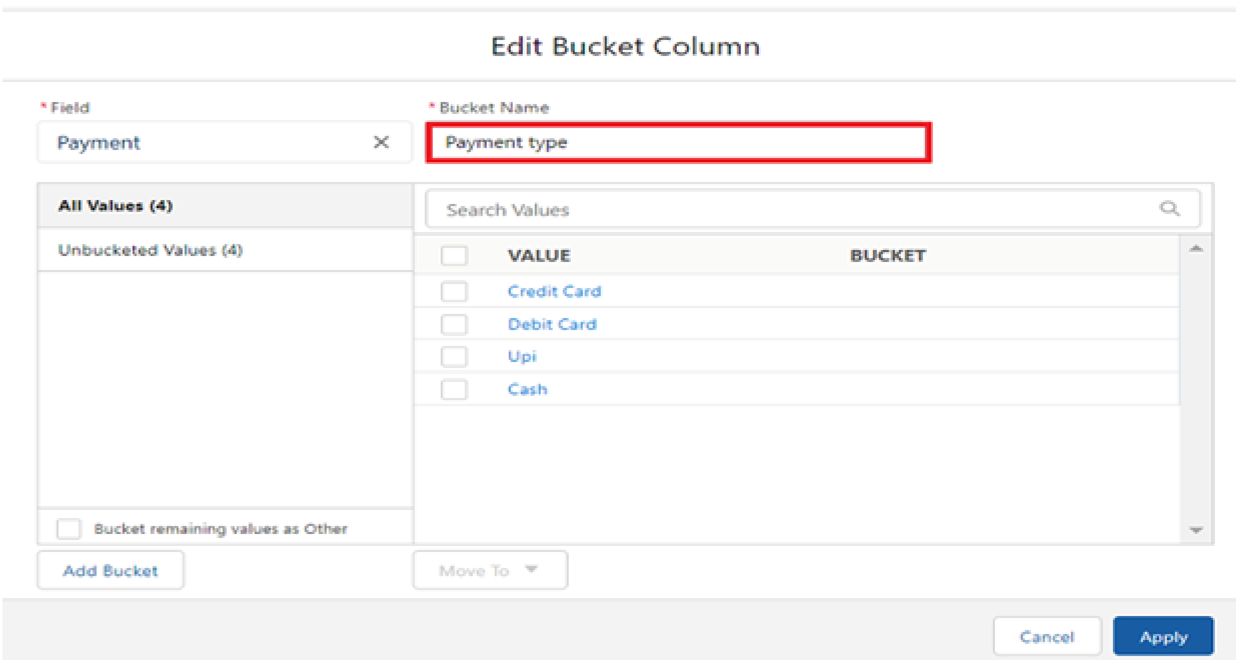
6.Customize your report by selecting the following columns:**Consultant Name, Delivery Type, Products, Payment**.



7.Click the drop-down optionon the **Payment** column and select **Bucket This Column**.

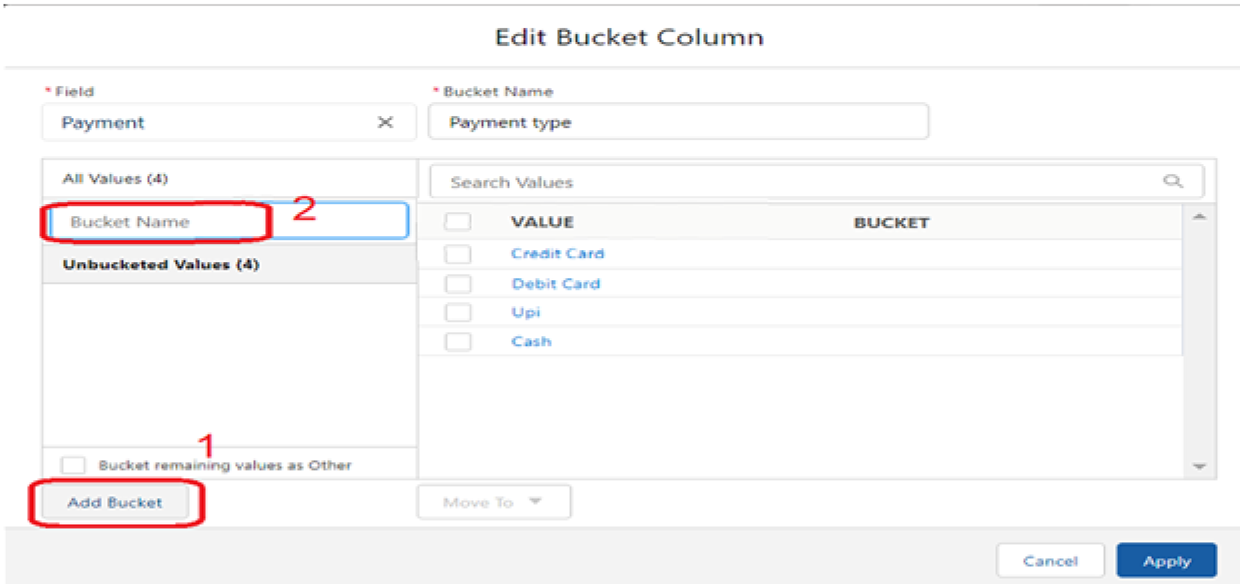


8.Name the bucket **Payment Type**.

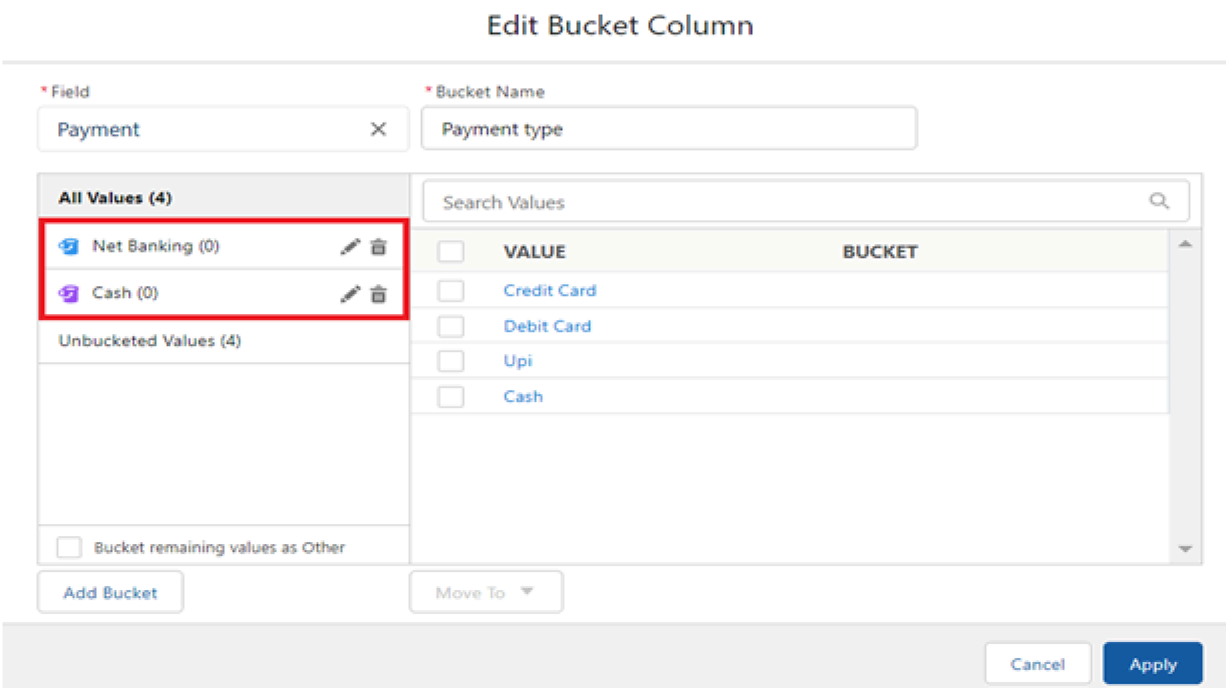


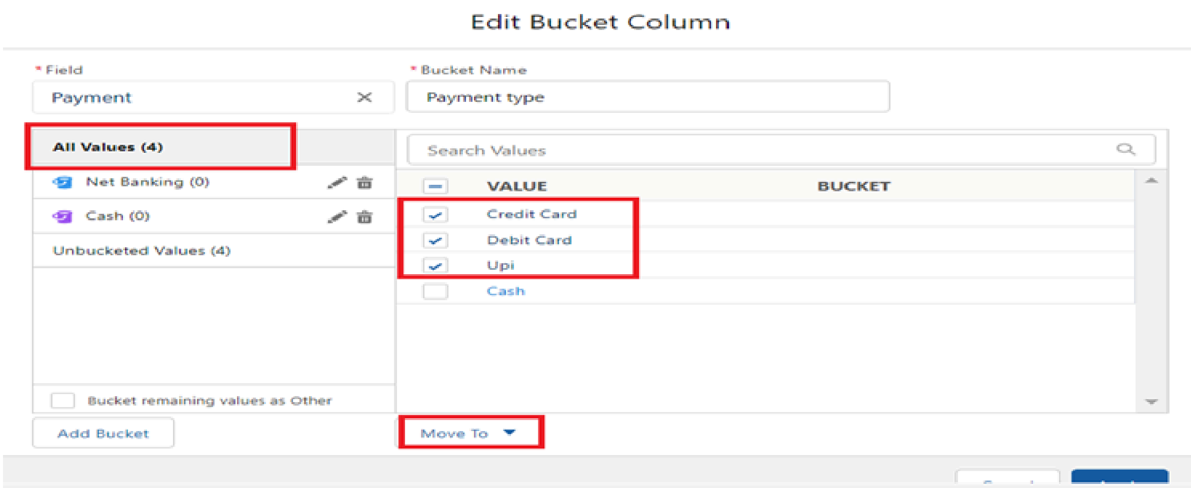
9.Click **Add Bucket** and name it **NetBanking**.

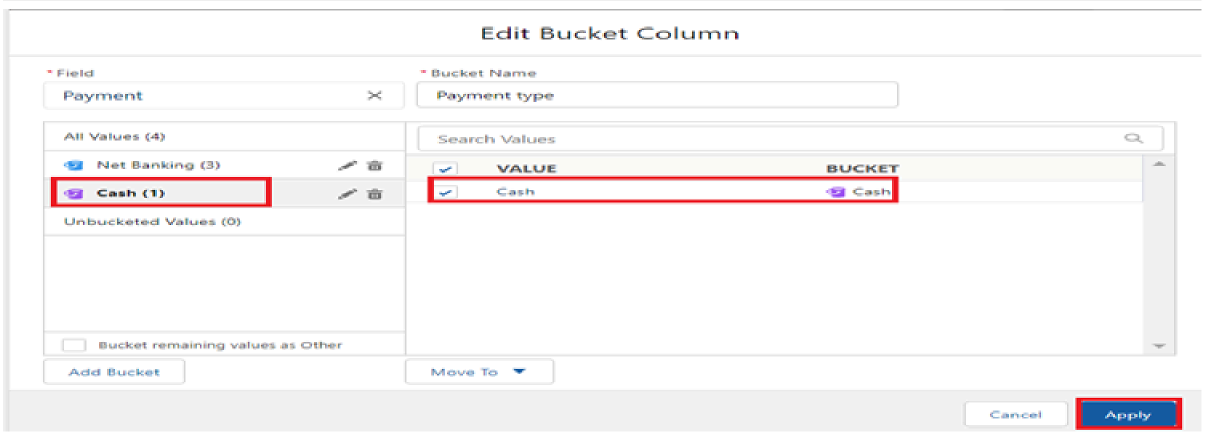
10.Click **Add Bucket** andname it **Cash**.



11.Click on **All Values**, select**Credit Card, Debit Card, UPI**, and move them to **NetBanking**.



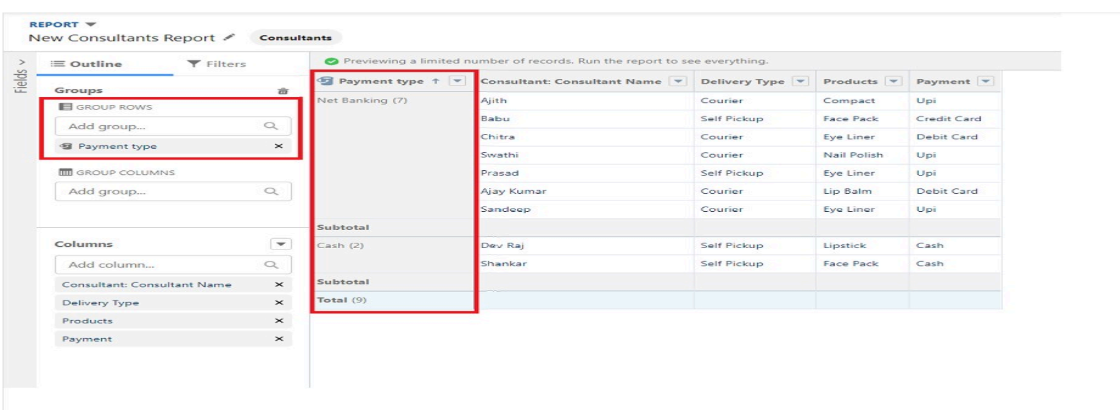




12.Click on **All Values** again, select **Cash**,and move it to **Cash**.

13.Click **Apply**.

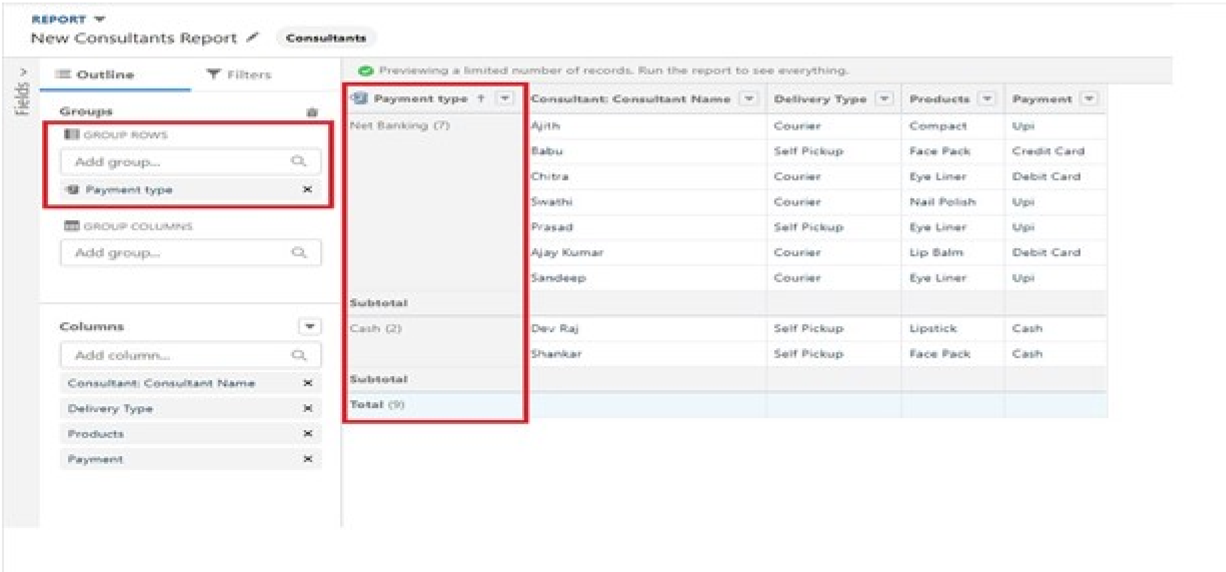
14.In **Group Rows**, add the **Payment Type Bucket** field.



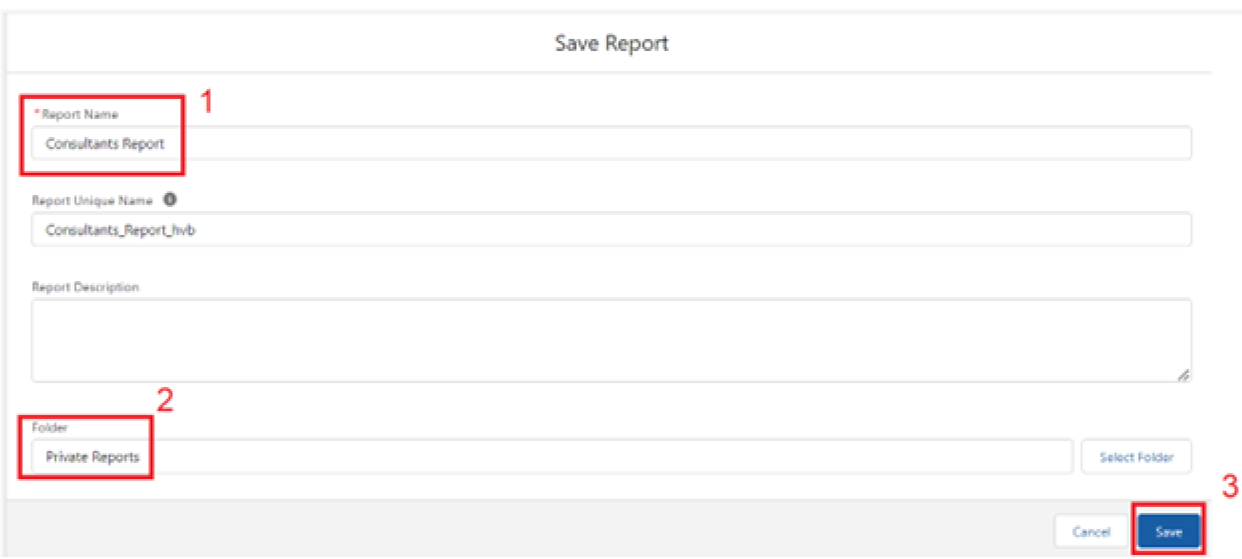
15.Click **Refresh**.

16.Click **Save and Run**.

17.Give the report a name, e.g., **ConsultantReport**.



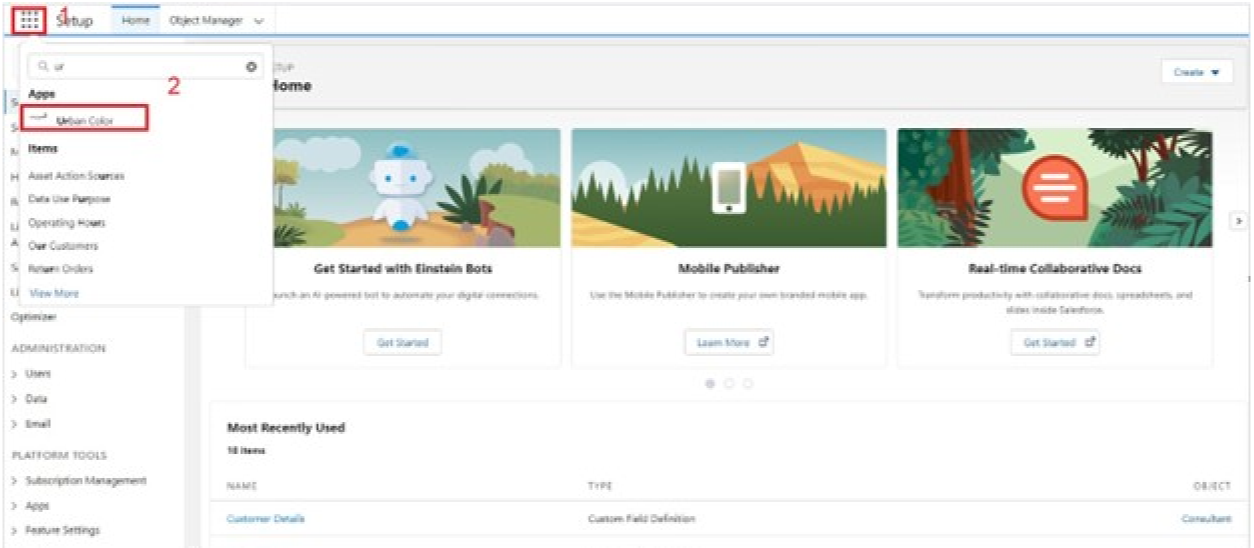
18. Click **Save**.



11.2 View Report

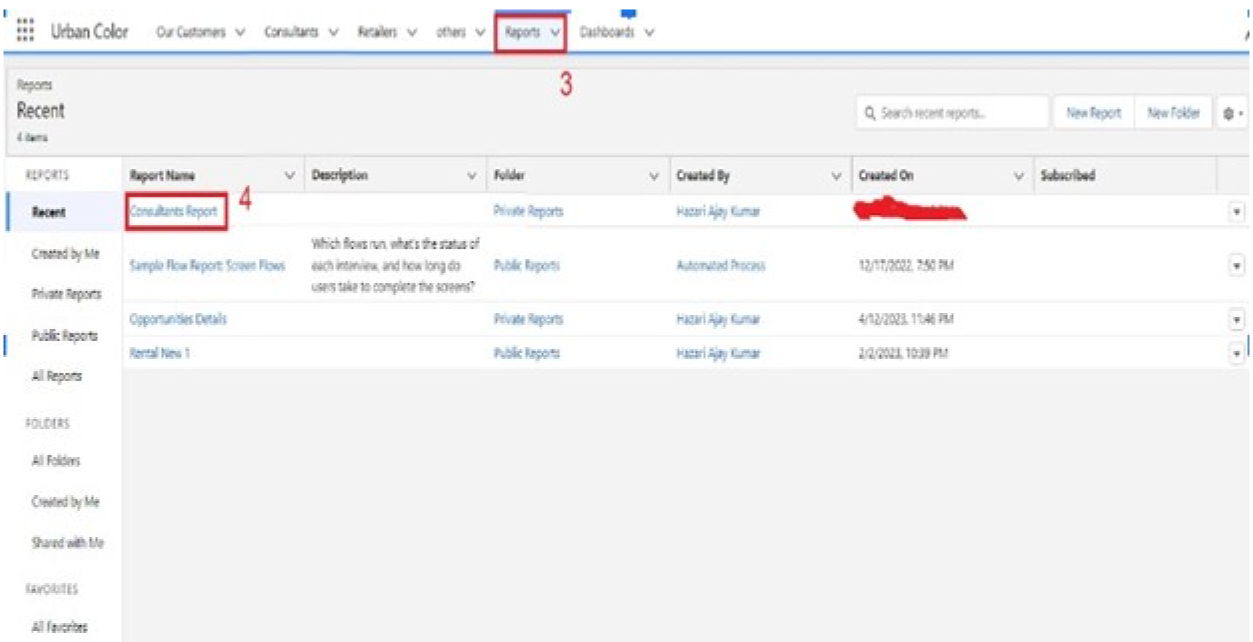
i. Click on the **App Launcher**on the left side of the screen.

ii. Search for **Urban Color App** and click on it.



iii.Click the **Reports** tab.

iv.Click on the **Urban Color Report** to view the records



12.Dashboards

Dashboards let you curate data from reports using charts, tables, and metrics. If your colleagues need more information, then they're able to view your dashboard's data supplying reports. Dashboard filters make it easy for users to apply different data perspectives to a singledashboard.

12.1 Create Dashboard

Here's a step-by-step guide to creatinga dashboard in the Urban Color application:

1. **Open the UrbanColor Application**: Launch the application and navigate to theDashboards tab.

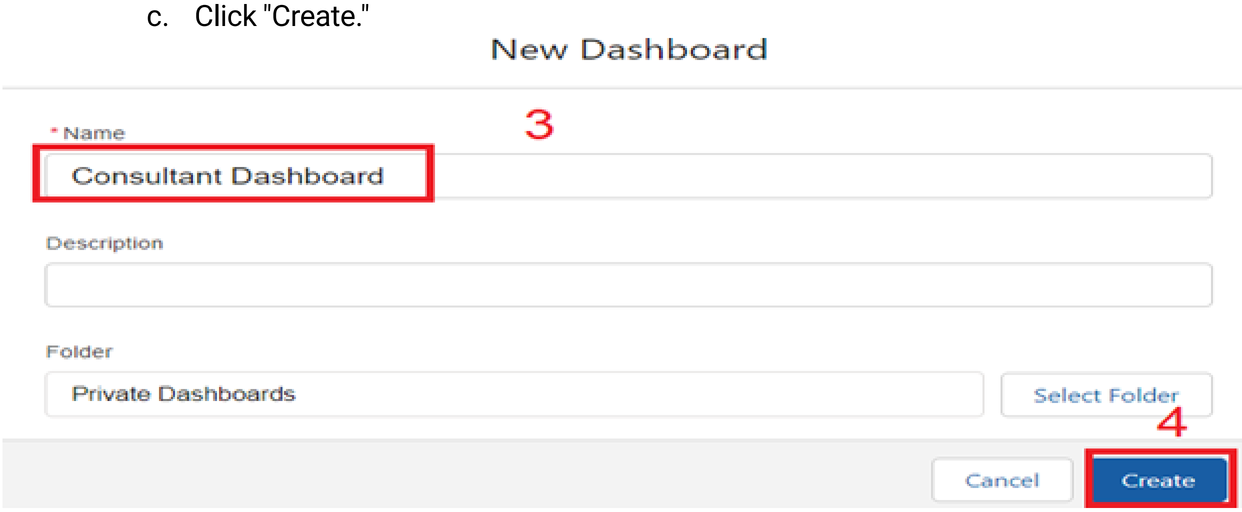
2. **Create a New Dashboard:**

   a. Click on the "New Dashboard" button.

3. Name Your Dashboard:

   b. Enter "Consultant Dashboard" in the name field.

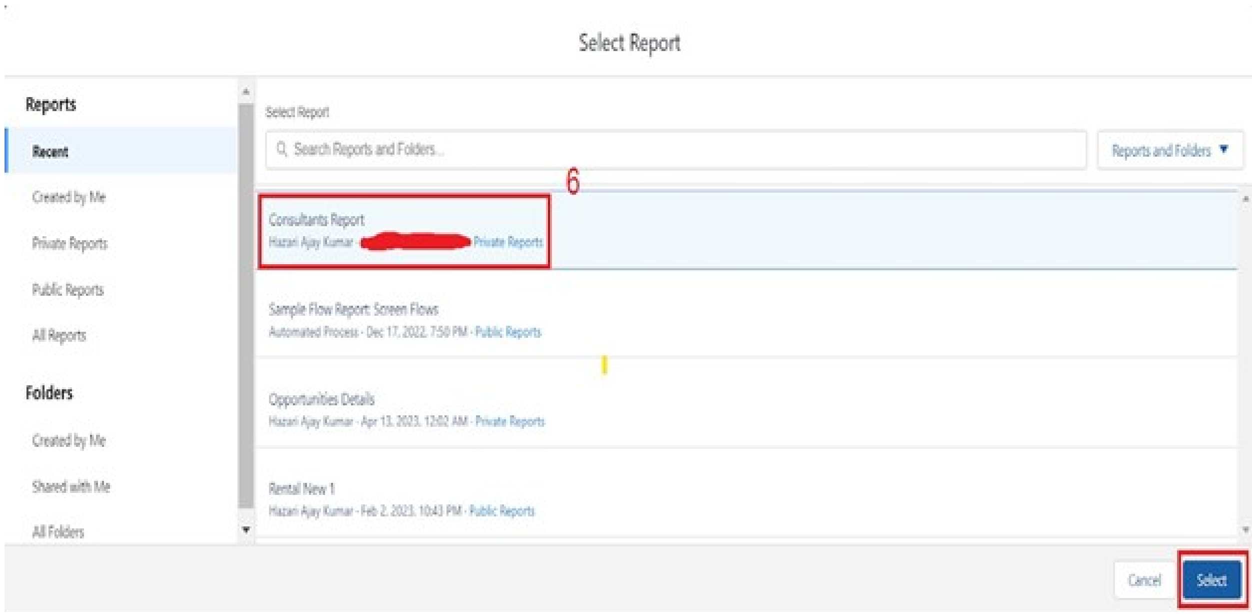
   c. Click "Create."



4. Add Components to the Dashboard:

   a. Click on "+ Component" to add a new component.

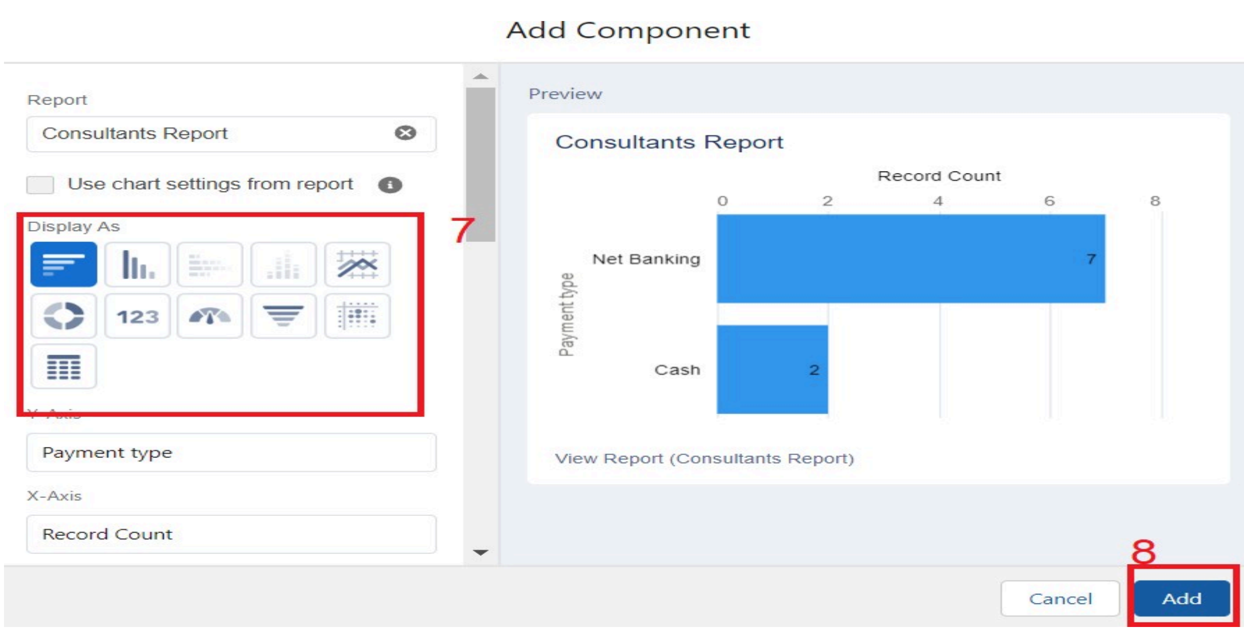
   b. Select the "Consultants Report" you created earlier.



5.Choose Data Visualization:

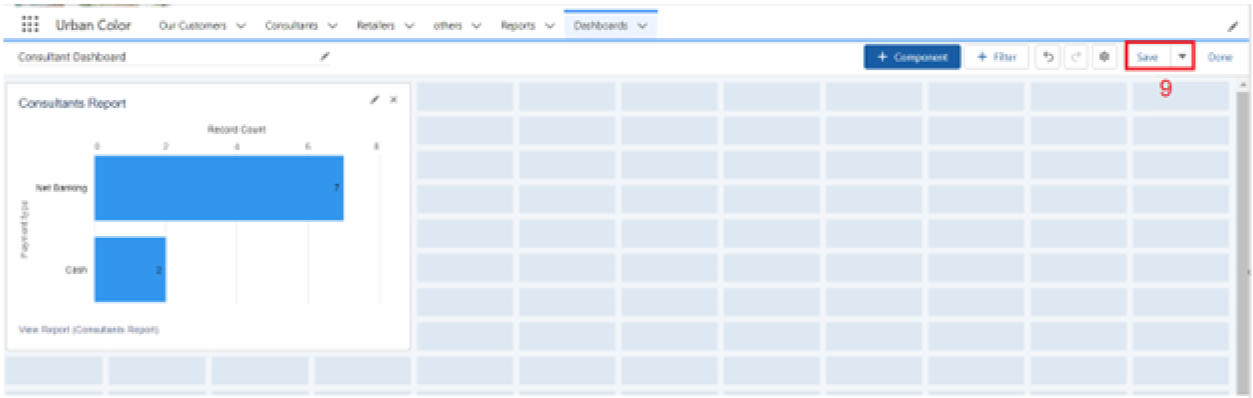
a. Pick a visualization type (e.g., chart, table) that best suits your data and needs.

b. Click "Add."



6.Save Your Dashboard:

a. After configuring the components and visualizations, click "Save" to finalize yourdashboard.



12.2 View Dashboard

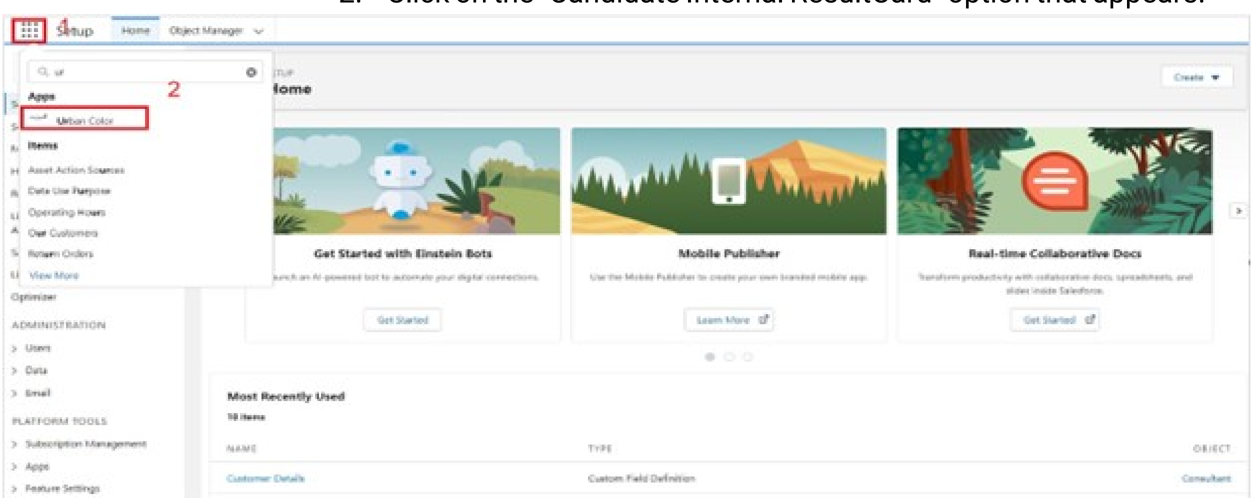
To view the dashboard, follow these steps:

i. **Open the App Launcher**:

1. Click on the App Launcher icon on the left side of the screen.

ii. **Search for the Dashboard**:

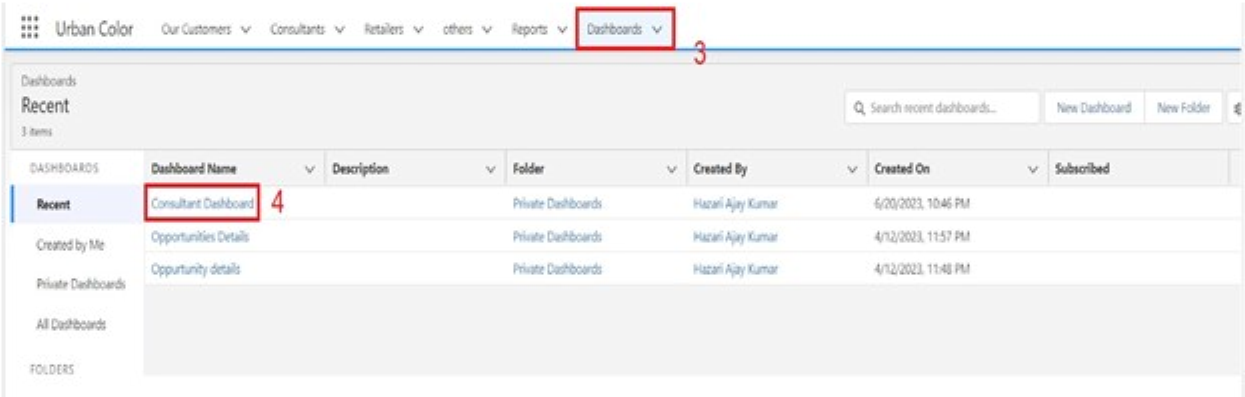
1. Type "Candidate Internal Result Card" into the search bar.
2. Click on the "Candidate Internal ResultCard" option that appears.



iii.Navigate to the Dashboard Tab:

- Once in the Candidate Internal Result Card view, click on the "Dashboard" tab.
- View the Graph:

Click on the "Candidate Internal Result Card" to see the graph view of the records.


Urban Color
Our Customers
Consultants
Retailers
others
Reports
Dashboards
3
Dashboards
Recent
3 items
Search recent dashboards...
New Dashboard
New Folder
DASHBOARDS
Recent
Created by Me
Private Dashboards
All Dashboards
FOLDERS
Dashboard Name
Description
Folder
Created By
Created On
Subscribed
Consultant Dashboard
4
Private Dashboards
Hazari Ajay Kumar
6/20/2023, 10:46 PM
Opportunities Details
Private Dashboards
Hazari Ajay Kumar
4/12/2023, 11:57 PM
Oppurtunity details
Private Dashboards
Hazari Ajay Kumar
4/12/2023, 11:48 PM