

Urban Color Management System

Empowering Colourful Lives

Developed By

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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.

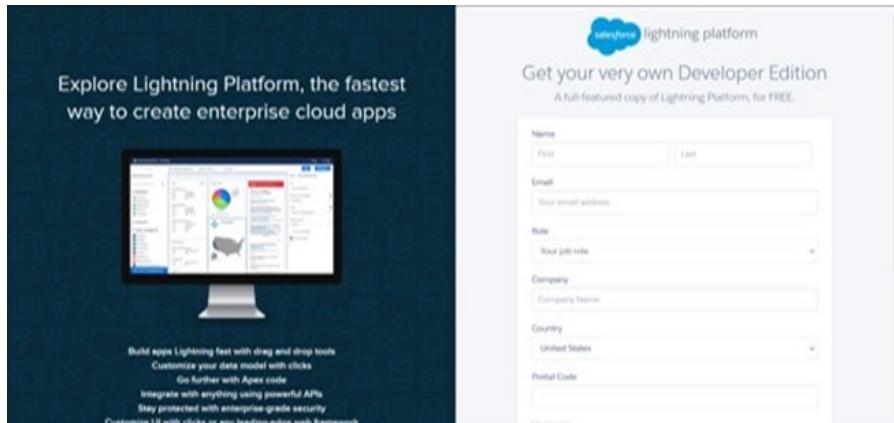
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1.Creating a Developer Account in Salesforce

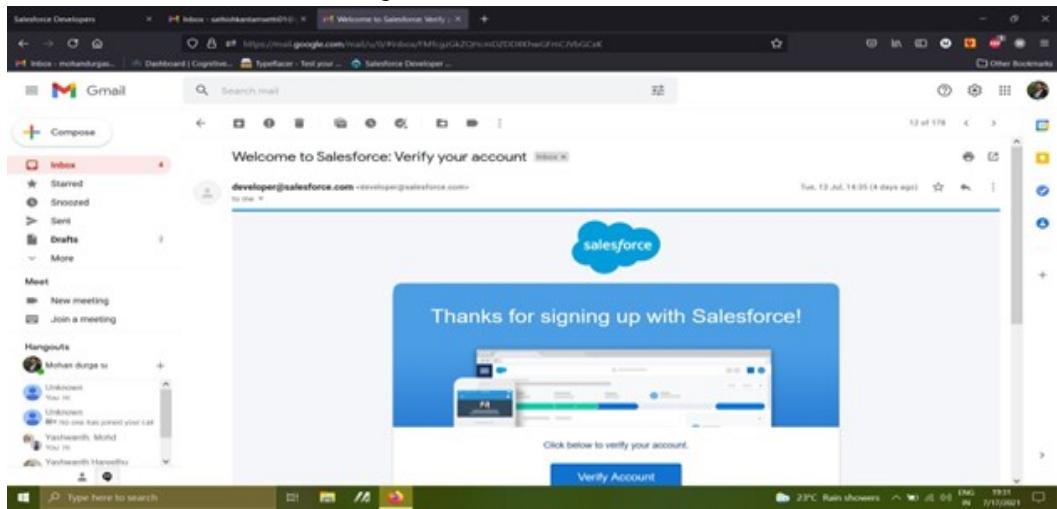
Step 1: Sign Up for a Developer Org

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.



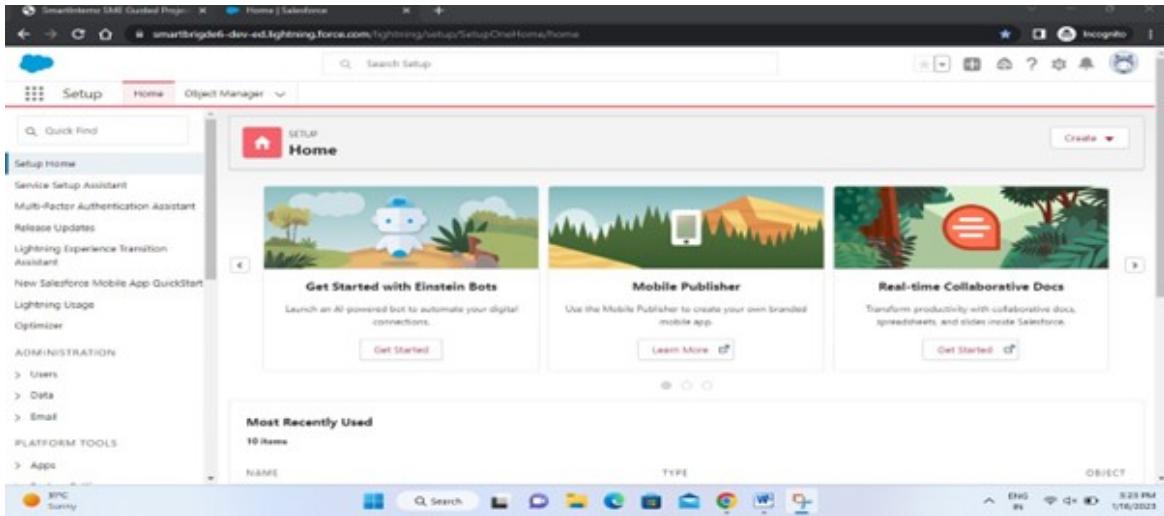
Step 2: Account Activation

1. **Go to your email inbox** that you used for signupt.
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 tables that allow you to store data 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 objects include **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 steps will 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 following boxes:

- Allow Reports
- Allow Search

Click "Save" to create the object.

Step 5: Create a 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**, select any 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 through the 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 following boxes:
 - a. **Allow Reports**
 - b. Allow Search**
3. Click "Save" to create the 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**, select any 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 steps will 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 following boxes:**
- a. **Allow Reports**
 - b. Allow Search**
3. **Click "Save"** to create the 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**, select any icon that represents your object.
-
6. Leave all other settings as defaults and click **Next**.
 7. **Click "Next"** again, then **Save**.

2.4 Creating the Others Object

The following steps will 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 following boxes:**

- a. **Allow Reports**
- b. Allow Search**

3. **Click "Save"** to create the 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 Object Tabs**, click **New**.

4.For **Object**, select **Others**.

5.For **Tab Style**, select any 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 different objects. 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, providing a 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 between related records, improving data consistency, and enhancing the overall user experience.

3.1.Fields in the "Our Customers" Object

The following fields are defined in the "Our Customers" 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	Address	Text Area
6	Additional Information	Text Area

3.2Fields in Consultants objects

The following fields are 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 defined in 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 interface and tailor it to meet the specific needs of your organization.

Page Layout Creation

- From the Salesforce setup menu, go to "**Object Manager**" and select the **Consultants** object.
- Click on "**PageLayouts**" in the left sidebar. This will display a list of available page layouts for the selected object.

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

SETUP > OBJECT MANAGER
Consultant

Page Layouts

PAGE LAYOUT NAME CREATED BY MODIFIED BY

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Consultant Layout	Hazari Ajay Kumar, 4/1/2023, 7:25 AM	Hazari Ajay Kumar, 6/18/2023, 10:30 PM

Details
Fields & Relationships
Page Layouts 1
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters

1
2

4. Click and drag the **DeliveryType** and **Address** fields below the **Phone** field.

SETUP > OBJECT MANAGER
Consultant

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields

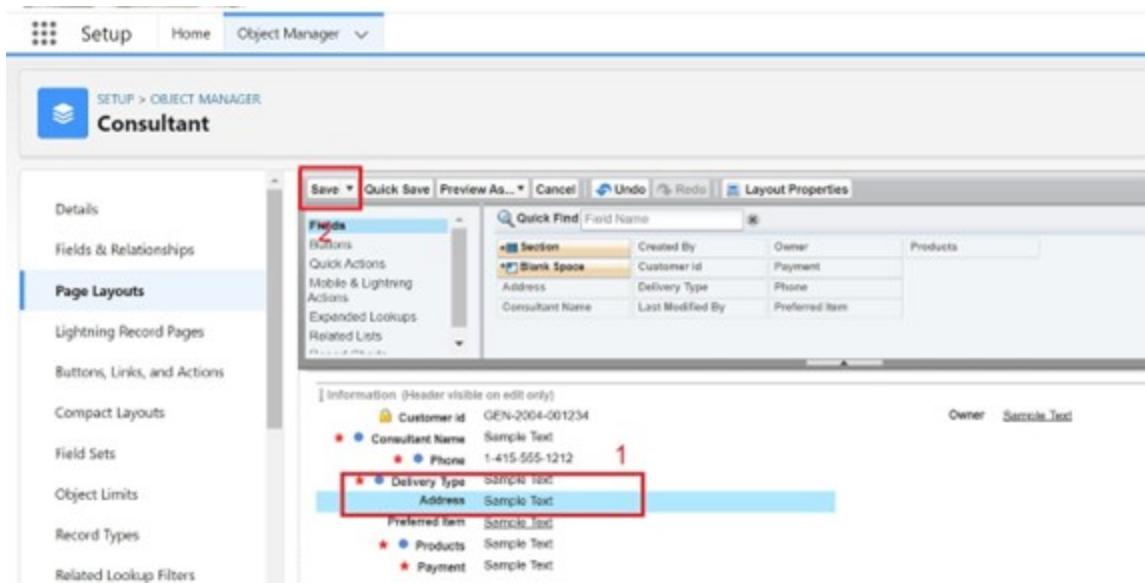
Customer Id Created By Owner
Blank Space Customer Id Payment
Address Delivery Type Phone
Consultant Name Last Modified By Preferred Item

Information (Header visible on edit only)

Customer Id	Created By	Owner
GEN-2024-001234	Customer Id	Payment
Sample Text	Delivery Type	Phone
1-415-555-1212	Phone	Preferred Item
Sample Text	Preferred Item	Sample Text
Sample Text	Products	Sample Text
Sample Text	Payment	Sample Text
Sample Text	Delivery Type	Sample Text
Address	Address	Sample Text

Customer Name Phone
Preferred Item Products
Products Payment
Delivery Type Address

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

5.1 Create 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 Details and Branding**.
 2. Click **Next**.
 3. On the **App Options** page, keep the settings as default.
 4. Click **Next**.
 5. On the **Utility Items** page, keep the settings as default.
 6. Click **Next**.

Lightning Experience App Manager

Clone (App or Beta)

New Lightning App New Connected App

App Name	Developer Name	Description	Last Modified	Type	Visible
All Sites	AlSites		04/12/2022, 10:15 am	Classic	
Analytics Studio	Insights	Build CRM Analytics dashboards and apps	04/12/2022, 10:15 am	Classic	
App Launcher	AppLauncher	App Launcher tabs	04/12/2022, 10:15 am	Classic	
Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry	04/12/2022, 10:15 am	Lightning	
Chatter Desktop	Chatter/Desktop	Chatter Desktop is an Adobe AIR-based desktop application that lets Chatter users stay connected...	28/12/2022, 4:05 pm	Connected (Managed)	
Chatter Mobile for BlackBerry	Chatter/ios/BlackBerry	The Salesforce.com Chatter Mobile app lets you access Chatter data on the go. Use it to view fe...	28/12/2022, 4:05 pm	Connected (Managed)	
College Management System	hazarem	demo app	06/12/2022, 4:18 pm	Lightning	
Community	Community	Salesforce CRM Communities	04/12/2022, 10:15 am	Classic	
Content	Content	Salesforce CRM Content	04/12/2022, 10:15 am	Classic	
Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage records	04/12/2022, 10:15 am	Lightning	

To Add Navigation Items:

1. Select the items (**Our Customers, Consultants, Retailers, Others, Reports, Dashboards**) from the search bar and move them using the arrow button.
2. Click **Next**.

New Lightning App

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items

Selected Items

No items selected

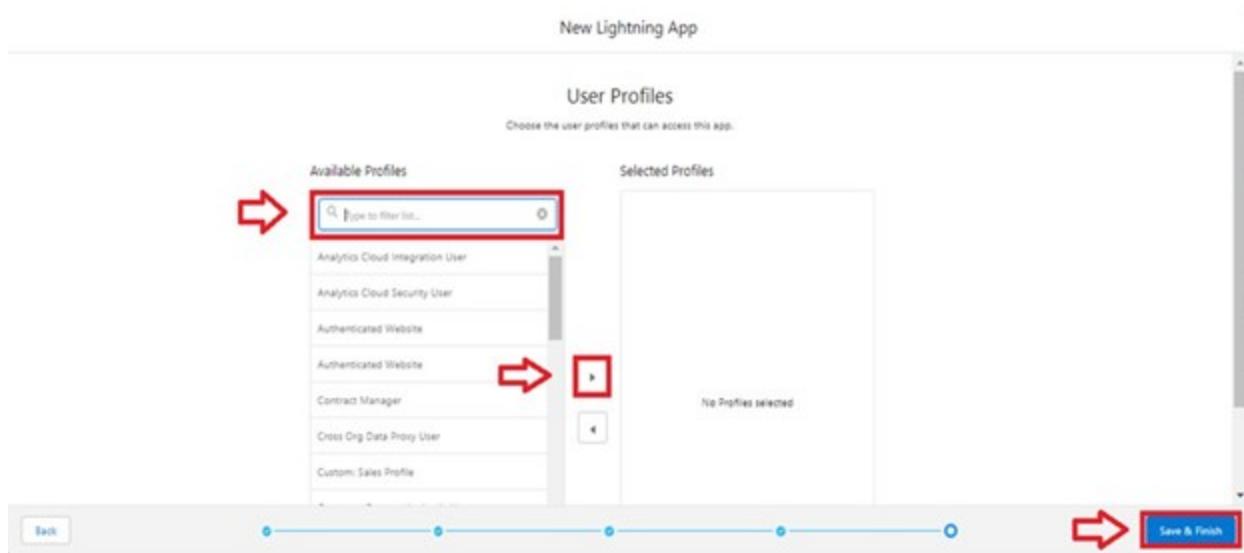
Back Next

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**.



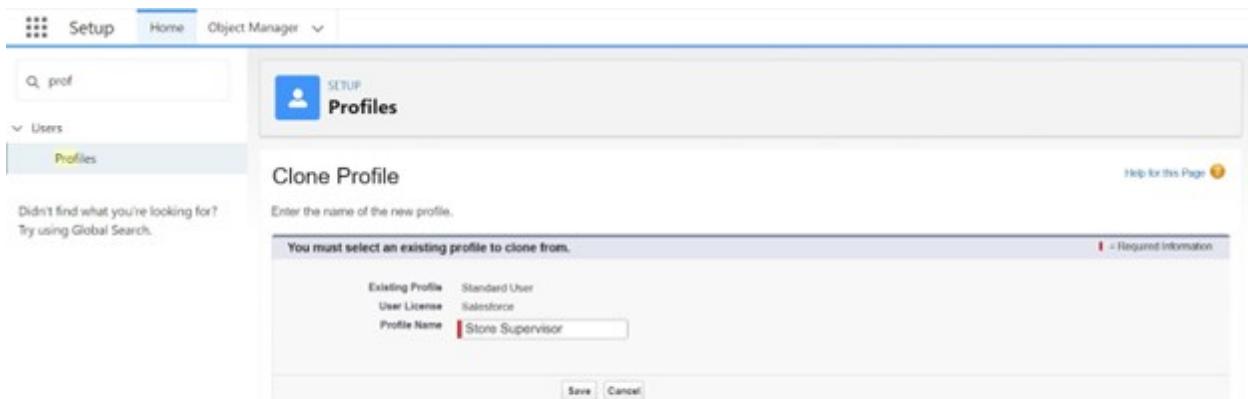
6.Profile

A profile is a group/collection of settings and permissions that define what 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.

6.1 Creating a Profile

Creating a Store Supervisor Profile and Setting Object 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.

Q profi

SETUP Profiles

Profile

Store Supervisor

Didn't find what you're looking for?
Try using Global Search.

Login IP Raogea (0) | Enabled Apex Class Access (0) | Enabled Visualforce Page Access (0) | Enabled External Data Source Access (0)
Enabled External Credential Principal Access (0) | Enabled Custom Metadata Type Access (0) | Enabled Custom Setting Definitions Access (0)
Enabled Service Presence Status Access (0) | Enabled Custom Permissions (0)

Profile Detail	
Name	Store Supervisor
User License	Salesforce
Description	Custom Profile <input checked="" type="checkbox"/>

Community (standard__Community)
Content (standard__Content)
Data Manager (standard__DataManager)
Digital Experiences (standard__SalesforceCME)
Lightning Usage App (standard__LightningInstrumentation)
LWC LEARNINGS (LWC__LEARNING\$)
Marketing (standard__Marketing)
Queue Management (standard__QueueManagement)
Rental Management (Rental_Management)

(standard__l_name)
Salesforce Scheduler Setup (standard__LightningScheduler)
Sample Console (standard__ServiceConsole)
Service (standard__Service)
Service Console (standard__LightningService)
Site.com (standard__Sites)
Subscription Management (standard__RevenueCloudConsole)
Urban Color (Urban_Color)
Vehicle Management (Vehicle_Management)
WDC (standard__Work)

Service Provider Access

Tab Settings

'Community owned' tab customizations.

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

9.Click on **Save**.

To Create a New Profile:

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

	others	Our Customers	Pipelines	Pipeline Stages	Projects	Properties	Remote Changes	Rentals	Repositories	Retailers	Semesters	Source Member References			
Async Operation Results	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>								
Back Syncs	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>								
Branches	<input type="checkbox"/>														
Change Bundles	<input type="checkbox"/>														
Change Bundle Installs	<input type="checkbox"/>														
Change Submissions	<input type="checkbox"/>														
Commercial Vehicles	<input type="checkbox"/>														
Consultants	<input checked="" type="checkbox"/>														
Customers1	<input type="checkbox"/>														
Customer Details	<input type="checkbox"/>														
Deploy Components	<input type="checkbox"/>														
Deployment Results	<input type="checkbox"/>														

Similarly, Create an Operator Profile:

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

SETUP

Profiles

Profile Edit

Billing Operator

Set the permissions and page layouts for this profile.

Profile Edit

Name: Billing Operator

User License: Salesforce

Description:

Custom Profile:

Save | Save & New | Cancel

SETUP

Profiles

Allow Audit for employees: [i](#)

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: [i](#)

Save | Save & New | Cancel

3. Click on **Save**.

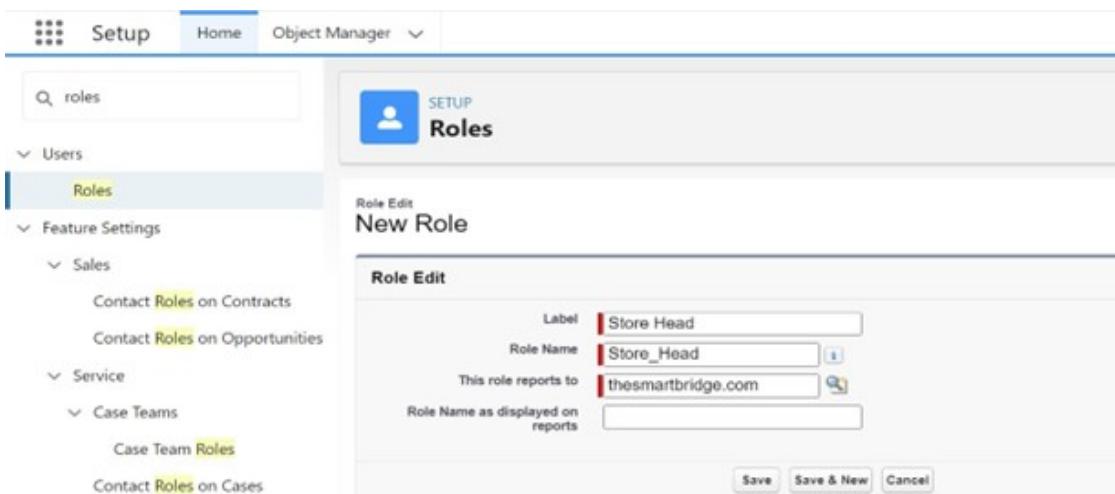
7. Setup Roles

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

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**, click on **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 displayed on reports.
10. Click on **Save**.

Similarly, create one role under Store Head as Billing Operator.



Setup Home Object Manager

roles

Users Roles Feature Settings

Sales Contact Roles on Contracts Contact Roles on Opportunities

Service Case Teams Case Team Roles Contact Roles on Cases

Didn't find what you're looking for? Try using Global Search.

SETUP Roles

New Role

Role Edit

Label: Billing Operator

Role Name: Billing_Operator

This role reports to: Store Head

Role Name as displayed on reports:

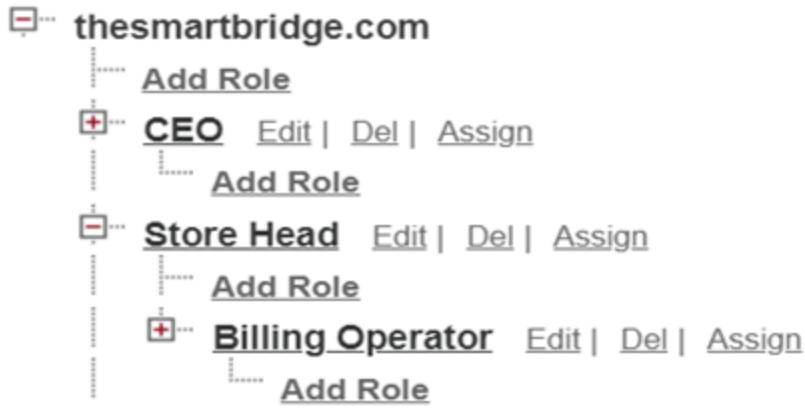
Save Save & New Cancel

Help for this Page

The screenshot shows the Salesforce Setup interface. On the left, there's a sidebar with navigation links like 'Setup', 'Home', and 'Object Manager'. Under 'Object Manager', 'Roles' is selected. A search bar at the top says 'roles'. The main area has a title 'SETUP Roles' with a user icon. Below it, 'New Role' is highlighted. A 'Role Edit' form is open, showing fields for 'Label' (set to 'Billing Operator'), 'Role Name' (set to 'Billing_Operator'), and 'This role reports to' (set to 'Store Head'). There are also buttons for 'Save', 'Save & New', and 'Cancel'. At the bottom right of the page, there's a link 'Help for this Page' with a question mark icon.

Your Organization's Role Hierarchy

[Collapse All](#) [Expand All](#)

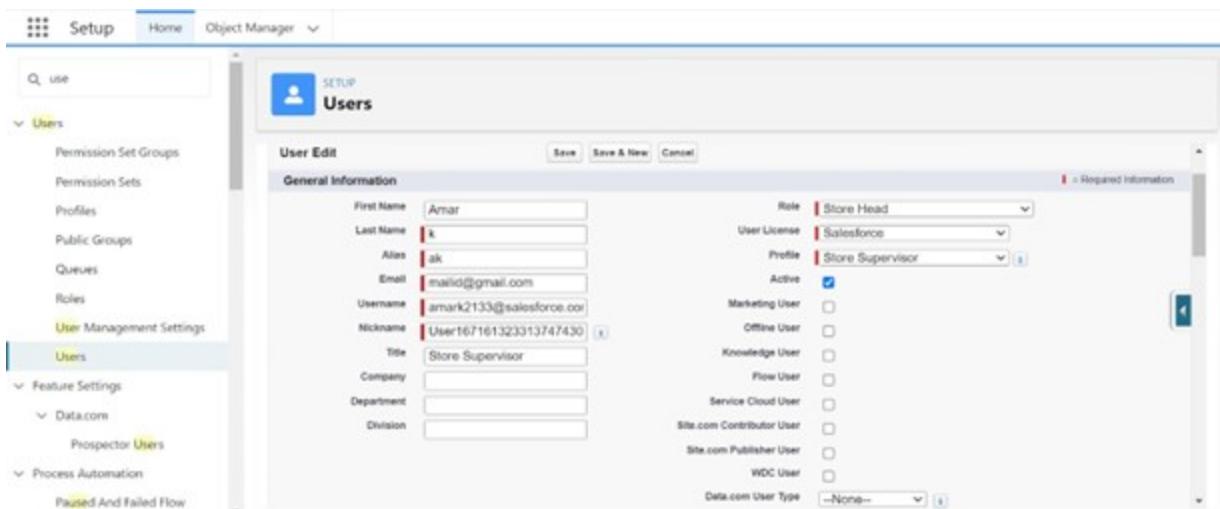


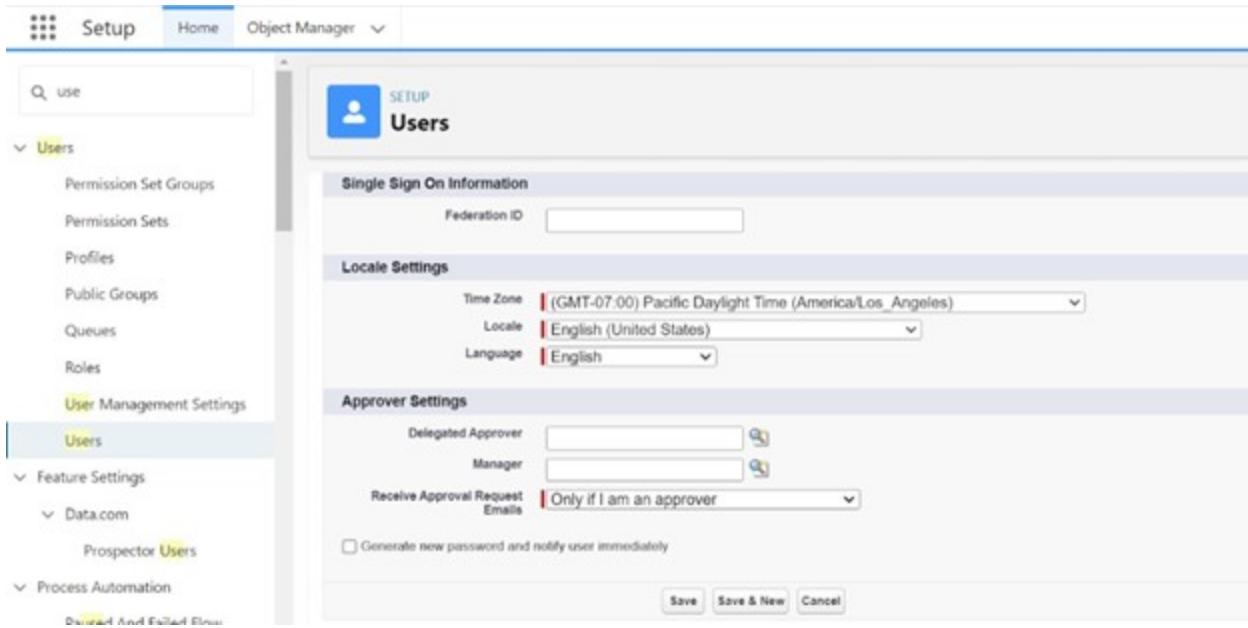
8. Users

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:

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 username in 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 the email address.
4. Select a **Role as Billing Operator**.
5. Select a **User License as Salesforce Platform**.
6. Select a **Profile as Billing Operator**.
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**.

Setup Home Object Manager

Q user

Users

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users**
- Feature Settings
- Data.com
- Prospector Users
- User Interface
- Action Link Templates
- Actions & Recommendations
- App Menu
- Custom Labels
- Density Settings
- Global Actions

SETUP Users

User Edit

General Information

First Name	John
Last Name	Buddy
Alias	Buddy
Email	buddyjohn@gmail.com
Username	johnbuddy@saledone.com
Nickname	User16FH029967441831
Title	Vehicle Manager
Company	
Department	
Office	

Note: Billing Operator
User License: Salesforce Platform
Profile: Billing Operator

Action:

Marketing User:
Offline User:
Knowledge User:
Flow User:
Service Cloud User:
Data.com Contributor User:
Site.com Publisher User:
WCC User:

Data.com User Type:

Data.com Monthly Address Limit:

Accessibility Mode (Classic Only):
High-Contrast Labels + Icons:
Load Lightning Pages While Scrolling:
Debug Mode:
Make Setup My Default Landing Page:

Save Save & New Cancel

Setup Home Object Manager

Q user

Users

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users**
- Feature Settings
- Data.com
- Prospector Users
- Process Automation
- Paused And Failed Flow

SETUP Users

Single Sign On Information

Federation ID:

Locale Settings

Time Zone: (GMT-07:00) Pacific Daylight Time (America/Los_Angeles)
Locale: English (United States)
Language: English

Approver Settings

Delegated Approver:
Manager:
Receive Approval Request Emails: Only if I am an approver
 Generate new password and notify user immediately

Save Save & New Cancel

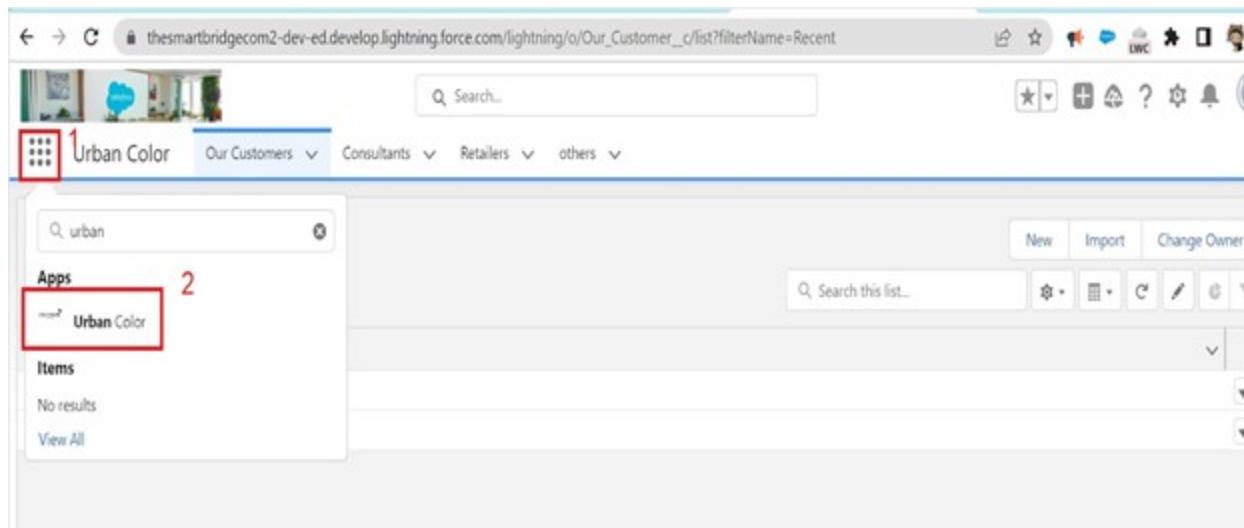
9. User Adoption

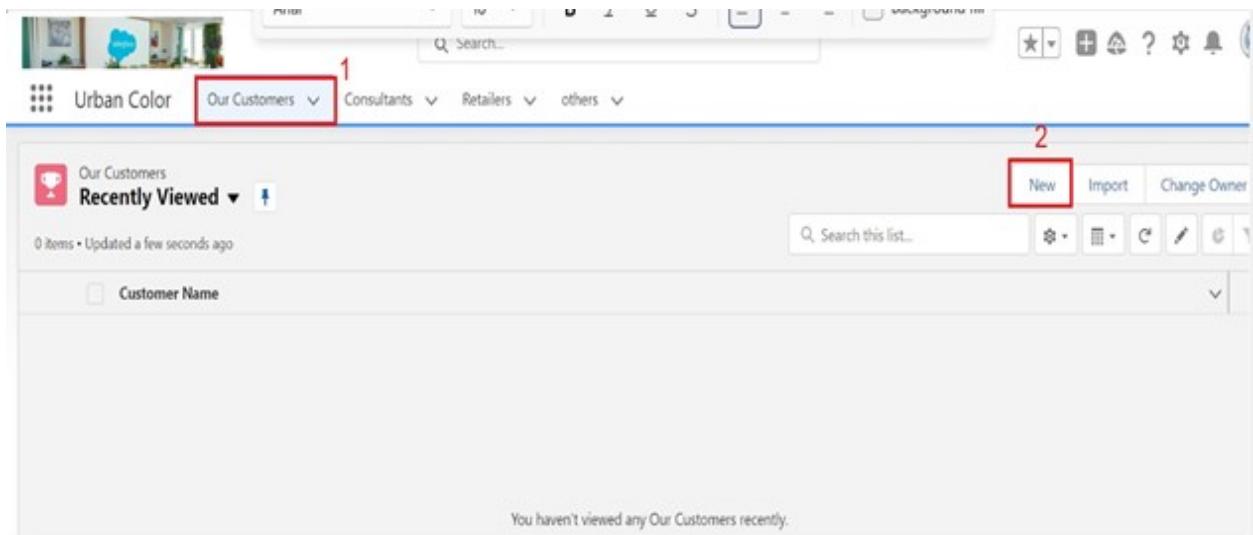
We need to understand user adoption and navigation. How to interact with database and their records.

To ensure effective **user adoption** and navigation, it's important to 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 click on 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** and click on it.
 3. Click on the **Our Customer** tab.
 4. Click on any **record name** to view the details of the **Our Customer**.

Information 1

* Customer Name
 Owner
Hazari Ajay Kumar

Complete this field.

Customer id

* Phone

Email id

Address

Cancel Save & New Save 2

The screenshot shows a CRM application interface. At the top, there is a navigation bar with several tabs: 'Urban Color', 'Our Customers' (which is highlighted with a red box), 'Consultants', 'Retailers', and 'others'. Below the navigation bar, there is a search bar with the placeholder 'Search this list...' and some filter icons. The main content area displays a list of 'Recently Viewed' customers. The first customer in the list is 'Suresh', which is also highlighted with a red box. The list includes two items: 'Suresh' and 'Kamal'. Below this list, there is a detailed view for the customer 'Suresh'. The 'Details' tab is selected (indicated by a blue underline). The details shown include: Customer Name (Suresh), Customer id (5), Phone (97583873728), Email id (suresh@gmail.com), Address (Hyderabad), Additional Information (Customer), and Owner (Hazari Ajay Kumar).

Customer Name	Owner
Suresh	Hazari Ajay Kumar

Customer id: 5

Phone: 97583873728

Email id: suresh@gmail.com

Address: Hyderabad

Additional Information: Customer

Owner: Hazari Ajay Kumar

Delete Record (Our Customer)

1. Click on the **App Launcher** on the left side of the screen.
2. Search for **Urban Color** and click on 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.

Our Customers

Recently Viewed

Customer Name

1 Suresh

2 Kamal

New Import Change Owner

Search this list...

1

2

3

Delete Our Customer

Are you sure you want to delete this Our Customer?

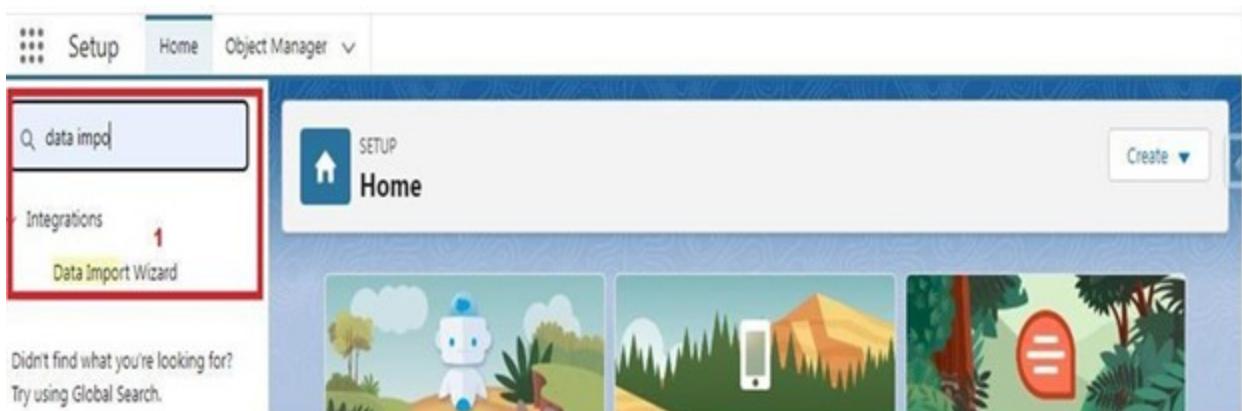
Cancel Delete

10. ImportData

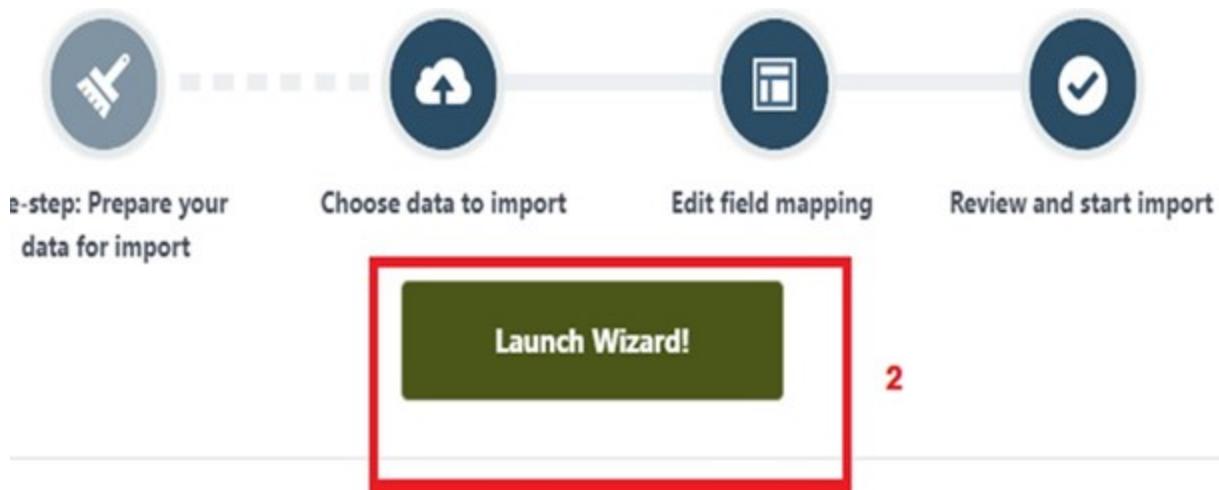
Data Import Wizard—This tool, accessible through the **Setup** menu, allows you to import data into common standard objects such as **Contacts**, **Leads**, **Accounts**, as well as data into custom objects.

To ImportData

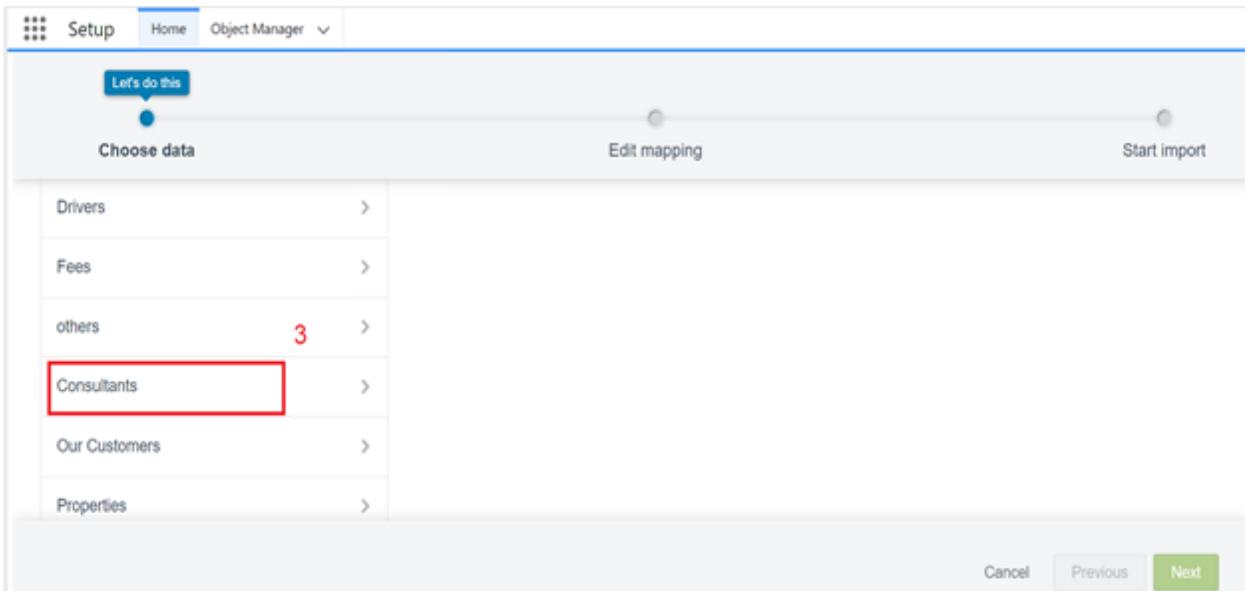
1. From **Setup**, click the **Home** tab.
2. In the **Quick Find** box, enter **Data Import** and select **Data Import Wizard**.



3. Click **Launch Wizard!**



4. Click the **Custom Objects** tab and select the **Consultant** object



5. Select Add New Records.

Import your Data into Salesforce

You can import up to 50,000 records at a time.

What kind of data are you importing? ?

Standard objects	Custom objects
Attendees	>
Buyers	>

What do you want to do? ?

Add new records	>
Update existing records	>
Add new and update existing records	>

Where is your data located? ?

6. Click **CSV** and choose the file **Consultant_CSV** which was created earlier. Click **Next**.

What kind of data are you importing? (?)

Standard objects Custom objects

Attendees >
Buyers >
Customers >
Departments > ✓

What do you want to do? (?)

Add new records ✓

Match by: (?)
—None-- ▼

Which User field in your file designates record owners? (?)
—None-- ▼

Trigger workflow rules and processes? (?)
 Trigger workflow rules and processes for new and updated records

Where is your data located? (?)

Drag CSV file here to upload

CSV 5

Cancel Previous **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**.

Setup Home Object Manager ▼

Almost done

Choose data Edit mapping Start import Help for this page ▼

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
Change	Mobile Number	Mobile Number	984658752	784653673	982839439
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
Change	Email	Email	ajith@gmail.com	babu24@gmail.com	

Cancel Previous **Next**

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

Choose data

Edit mapping

Start Import

Review & Start Import
Review your import information and click Start Import.

Your selections:

- Consultants ✓
- Add new records ✓
- Consultants - Sheet1 (2).csv ✓

Your import will include:

Mapped fields: 7

Unmapped fields: 0

Help for this page ⓘ

Cancel Previous Start Import

9. Click **OK** on the popup.

Congratulations, your import has started!
Click OK to view your import status on the Bulk Data Load Job page.

OK

10. Scroll down the page and verify that 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
View Request	View Result	7512w00000Xqar	6/19/2023, 11:05 PM	6/19/2023, 11:05 PM	103	52	0	9	0

11. Make sure you have **0 records** under the **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 specific criteria, providing answers to 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 grand total.
- b. Easy to set up but cannot be used to create groups of data or charts and cannot be used in Dashboards.
- c. Primarily used to generate simple lists or lists with a grand total.

2. Summary Reports:

- a. The most commonly used report format, allowing the grouping of rows of data, viewing subtotals, and creating charts.

3. Matrix Reports:

- a. The most complex report format, summarizing information in a grid format.
- b. Allows records to be grouped by both columns and rows.
- c. Can be used to generate dashboards and add charts.

4. Joined Reports:

- a. Allows the creation of different views of data from multiple report types.
- b. Data in joined reports is organized in blocks, each acting as a subreport with its own fields, columns, sorting, and filtering.
- c. Used to group and show data from multiple report 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 always have 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:

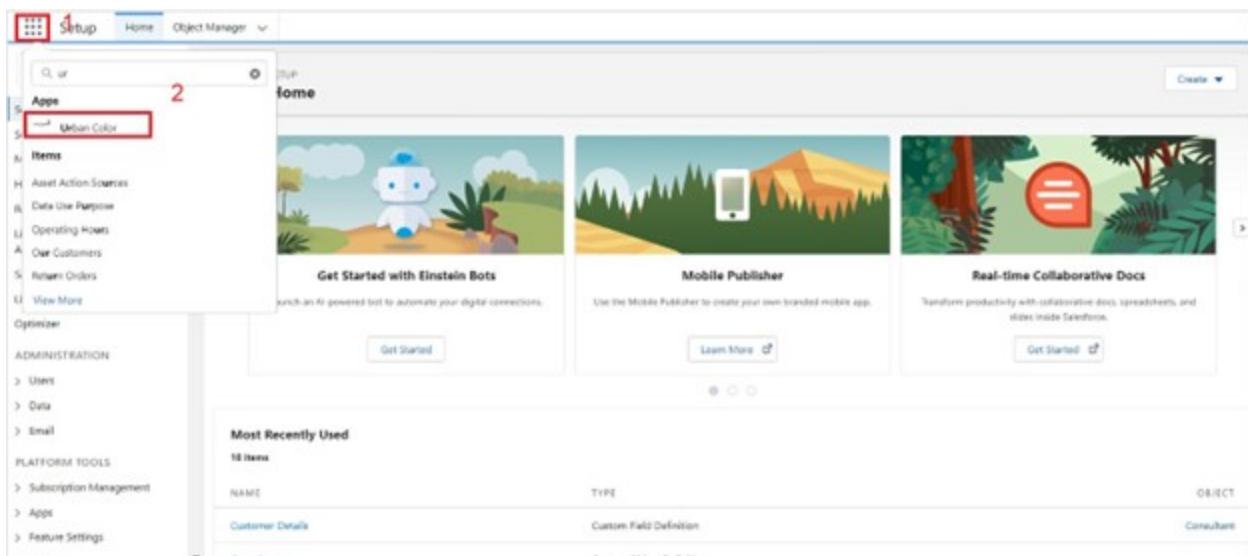
- a. Users can view and modifythe reports and move them to/from any other foldersthey have access to as Editor or Manager.

3. Manager:

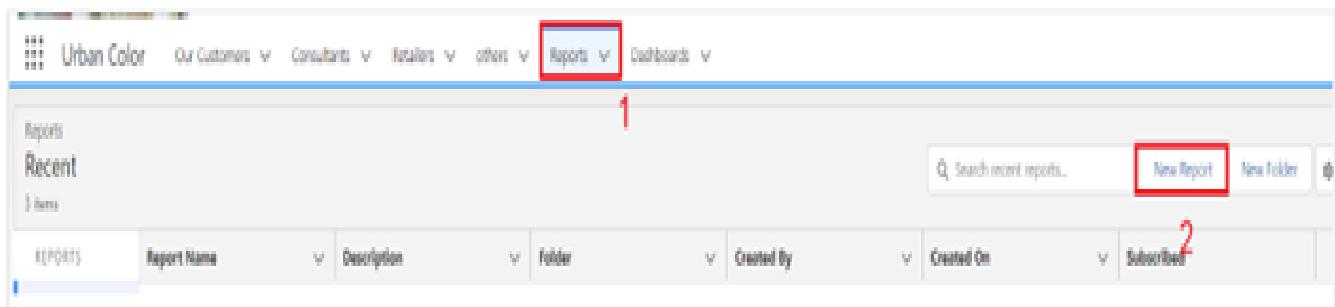
- a. Users can do everything Viewersand Editors can do, plus control other users'accesslevels to the folder.
- b. Managers can also delete the report.

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 and click Start Report.**

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

Consultant Name	Delivery Type	Products	Payment
Dev Raj	Self Pickup	Upshox	Cash
Ajith	Counter	Compart	Ubi
Biju	Self Pickup	Face Pack	Credit Card
Chitra	Counter	Eye Liner	Debit Card
Smith	Counter	Nail Polish	Ubi
Rajesh	Self Pickup	Eye Liner	Ubi
Ajay Kumar	Counter	Lip Balm	Debit Card
Shankar	Self Pickup	Face Pack	Cash
Sandeep	Counter	Eye Liner	Ubi

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

REPORT ▾

New Consultants Report / Consultants

Previews a limited number of records. Run the report to see everything.

Update Preview Automatically

Fields

- Outline
- Filters

Groups

(GROUP ROWS)

Add group... Q

Columns

Add columns... Q

Consultant Name	Delivery Type	Products	Payment
Devi Raj	Self Pickup	Lipstick	Cash
Ajith	Courier	Compact	UPI
Balu	Self Pickup	Face Pack	Credit Card
Chitra	Courier	Eye Liner	Debit Card
Seethi	Courier	Nail Polish	UPI
Priyad	Self Pickup	Eye Liner	UPI
Ajay Kumar	Courier	Lip Balm	Debit Card
Shankar	Self Pickup	Face Pack	Cash
Sandeep	Courier	Eye Liner	UPI

Sort Ascending

Sort Descending

Group Rows by This Field

Group Columns by This Field

Bucket This Column

Show Unique Count

Move Left

Move Right

Remove Column

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

Edit Bucket Column

* Field	* Bucket Name										
Payment	Payment type										
All Values (4)	Search Values										
Unbucketed Values (4)	<table border="1"> <thead> <tr> <th>VALUE</th> <th>BUCKET</th> </tr> </thead> <tbody> <tr> <td>Credit Card</td> <td></td> </tr> <tr> <td>Debit Card</td> <td></td> </tr> <tr> <td>UPI</td> <td></td> </tr> <tr> <td>Cash</td> <td></td> </tr> </tbody> </table>	VALUE	BUCKET	Credit Card		Debit Card		UPI		Cash	
VALUE	BUCKET										
Credit Card											
Debit Card											
UPI											
Cash											
<input type="checkbox"/> Bucket remaining values as Other											
<input type="button" value="Add Bucket"/> <input type="button" value="Move To"/>											
<input type="button" value="Cancel"/> <input type="button" value="Apply"/>											

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

10. Click **Add Bucket** and name it **Cash**.

Edit Bucket Column

* Field Payment	* Bucket Name Payment type										
All Values (4) <input checked="" type="checkbox"/> Bucket Name 2 Unbucketed Values (4)	Search Values 🔍 <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 10%;">VALUE</th> <th style="width: 90%;">BUCKET</th> </tr> </thead> <tbody> <tr><td><input type="checkbox"/> Credit Card</td><td></td></tr> <tr><td><input type="checkbox"/> Debit Card</td><td></td></tr> <tr><td><input type="checkbox"/> Upi</td><td></td></tr> <tr><td><input type="checkbox"/> Cash</td><td></td></tr> </tbody> </table>	VALUE	BUCKET	<input type="checkbox"/> Credit Card		<input type="checkbox"/> Debit Card		<input type="checkbox"/> Upi		<input type="checkbox"/> Cash	
VALUE	BUCKET										
<input type="checkbox"/> Credit Card											
<input type="checkbox"/> Debit Card											
<input type="checkbox"/> Upi											
<input type="checkbox"/> Cash											
<input type="checkbox"/> Bucket remaining values as Other <input style="border: 2px solid red; border-radius: 5px; padding: 2px; width: 100%;" type="button" value="Add Bucket"/>	<input style="border: 1px solid #ccc; border-radius: 5px; padding: 2px; width: 100px; margin-right: 10px;" type="button" value="Move To"/> <input style="border: 1px solid #ccc; border-radius: 5px; padding: 2px; width: 100px;" type="button" value="Cancel"/> <input style="background-color: #0072bc; color: white; border: 1px solid #0072bc; border-radius: 5px; padding: 2px; width: 100px;" type="button" value="Apply"/>										

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

Edit Bucket Column

* Field Payment	* Bucket Name Payment type										
All Values (4) <input checked="" type="checkbox"/> Net Banking (0) 1 <input checked="" type="checkbox"/> Cash (0) 2 Unbucketed Values (4)	Search Values 🔍 <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 10%;">VALUE</th> <th style="width: 90%;">BUCKET</th> </tr> </thead> <tbody> <tr><td><input type="checkbox"/> Credit Card</td><td></td></tr> <tr><td><input type="checkbox"/> Debit Card</td><td></td></tr> <tr><td><input type="checkbox"/> Upi</td><td></td></tr> <tr><td><input type="checkbox"/> Cash</td><td></td></tr> </tbody> </table>	VALUE	BUCKET	<input type="checkbox"/> Credit Card		<input type="checkbox"/> Debit Card		<input type="checkbox"/> Upi		<input type="checkbox"/> Cash	
VALUE	BUCKET										
<input type="checkbox"/> Credit Card											
<input type="checkbox"/> Debit Card											
<input type="checkbox"/> Upi											
<input type="checkbox"/> Cash											
<input type="checkbox"/> Bucket remaining values as Other <input style="border: 1px solid #ccc; border-radius: 5px; padding: 2px; width: 100%;" type="button" value="Add Bucket"/>	<input style="border: 1px solid #ccc; border-radius: 5px; padding: 2px; width: 100px; margin-right: 10px;" type="button" value="Move To"/> <input style="border: 1px solid #ccc; border-radius: 5px; padding: 2px; width: 100px;" type="button" value="Cancel"/> <input style="background-color: #0072bc; color: white; border: 1px solid #0072bc; border-radius: 5px; padding: 2px; width: 100px;" type="button" value="Apply"/>										

Edit Bucket Column

Field		Bucket Name	
Payment	X	Payment type	
All Values (4)		Search Values VALUE BUCKET <input checked="" type="checkbox"/> Credit Card <input checked="" type="checkbox"/> Debit Card <input checked="" type="checkbox"/> Upi <input type="checkbox"/> Cash	
Net Banking (0) Cash (0) Unbucketed Values (4)			
<input type="checkbox"/> Bucket remaining values as Other		Move To ▾	
Add Bucket			

Field		Bucket Name	
Payment	X	Payment type	
All Values (4)		Search Values VALUE BUCKET <input checked="" type="checkbox"/> Cash	
Net Banking (3) Cash (1) Unbucketed Values (0)		<input checked="" type="checkbox"/> Cash <input checked="" type="checkbox"/> Cash	
<input type="checkbox"/> Bucket remaining values as Other		Move To ▾	
Add Bucket		Cancel Apply	

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.

New Consultants Report				
Consultants				
Groups <input checked="" type="checkbox"/> GROUP ROWS Add group... <input type="button" value="Q"/> <input checked="" type="checkbox"/> Payment type Add group... <input type="button" value="Q"/>		Previewing a limited number of records. Run the report to see everything. Payment type ↑ Consultant: Consultant Name ↓ Delivery Type ↓ Products ↓ Payment ↓ Net Banking (7) Ajith Courier Compact Upi Babu Self Pickup Face Pack Credit Card Chitra Courier Eye Liner Debit Card Swathi Courier Nail Polish Upi Prasad Self Pickup Eye Liner Upi Ajay Kumar Courier Lip Balm Debit Card Sandeep Courier Eye Liner Upi Subtotal Cash (2) Subtotal Total (9)		
Columns Add column... <input type="button" value="Q"/> Consultant: Consultant Name <input type="button" value="X"/> Delivery Type <input type="button" value="X"/> Products <input type="button" value="X"/> Payment <input type="button" value="X"/>				

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.

The screenshot shows the Salesforce Home page. On the left, a sidebar menu is open with a red box labeled '1' highlighting the 'Setup' icon. The main content area has a red box labeled '2' highlighting the 'Urban Color' app in the 'Apps' section. The page features three promotional cards: 'Get Started with Einstein Bots', 'Mobile Publisher', and 'Real-time Collaborative Docs'. Below these cards is a section titled 'Most Recently Used' with a table showing two items: 'Customer Details' (Custom Field Definition) and 'Consultant' (Object).

iii.Click the **Reports** tab.

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

The screenshot shows the Reports page. At the top, there is a navigation bar with tabs: 'Urban Color', 'Our Customers', 'Consultants', 'Retailers', 'others', 'Reports' (which is highlighted with a red box labeled '3'), and 'Dashboards'. The main content area displays a table of reports under the 'Recent' tab. A red box labeled '4' highlights the 'Consultants Report' in the 'Report Name' column. The table includes columns for REPORTS, Report Name, Description, Folder, Created By, Created On, and Subscribed. Other reports listed include 'Sample Flow Report: Screen Flows', 'Opportunities Details', and 'Rental New 1'.

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 single dashboard.

12.1 Create Dashboard

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

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

2. **Create a New Dashboard:**

- Click on the "New Dashboard" button.

3. **Name Your Dashboard:**

- Enter "Consultant Dashboard" in the name field.
- Click "Create."

New Dashboard

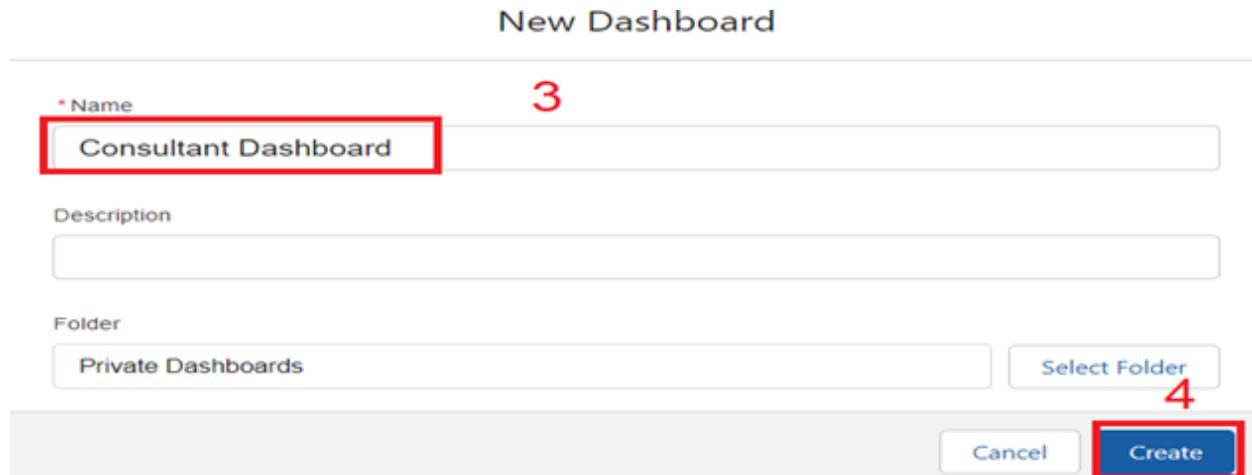
* Name 3

Description

Folder

Select Folder 4

Cancel Create



4. **Add Components to the Dashboard:**

- Click on "+ Component" to add a new component.
- Select the "Consultants Report" you created earlier.

Select Report

Reports

Recent

Created by Me

Private Reports

Public Reports

All Reports

Folders

Created by Me

Shared with Me

All Folders

Consultants Report
Hazari Ajay Kumar - [REDACTED] Private Reports

Sample Flow Report: Screen Flows
Automated Process - Dec 17, 2022, 7:50 PM - Public Reports

Opportunities Details
Hazari Ajay Kumar - Apr 13, 2023, 12:02 AM - Private Reports

Rental New 1
Hazari Ajay Kumar - Feb 2, 2023, 10:43 PM - Public Reports

Select

5. Choose Data Visualization:

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

Add Component

Report

Consultants Report

Use chart settings from report

Display As

Payment type

X-Axis

Record Count

Preview

Consultants Report

Record Count

Net Banking 7

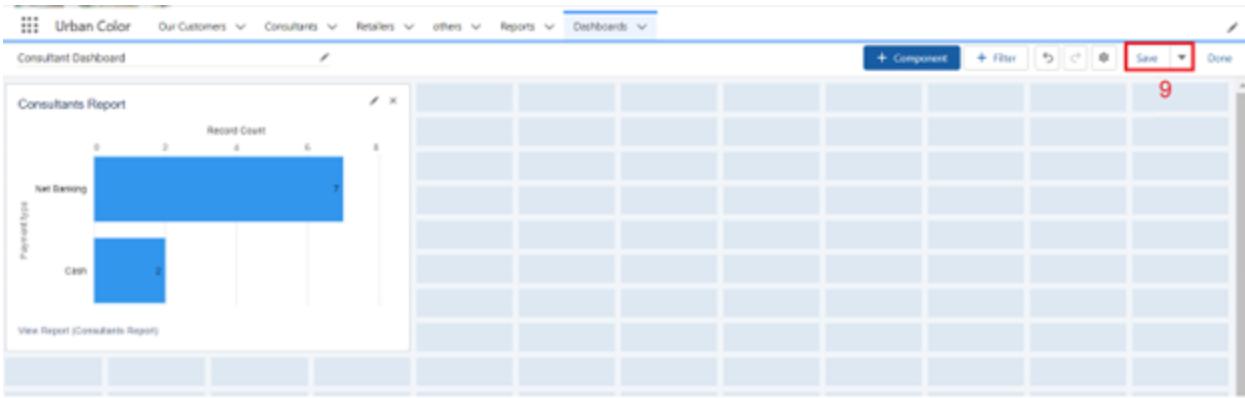
Cash 2

View Report (Consultants Report)

Cancel Add

6. Save Your Dashboard:

- After configuring the components and visualizations, click "Save" to finalize your dashboard.



12.2 View Dashboard

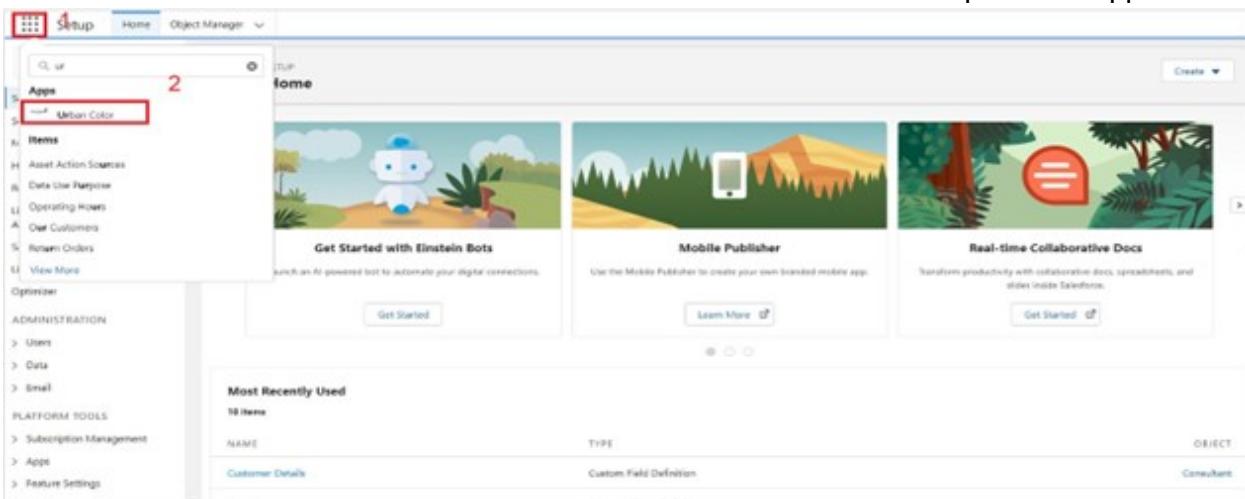
To view the dashboard, follow these steps:

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

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Consultant Dashboard 4		Private Dashboards	Hazari Ajay Kumar	6/20/2023, 10:46 PM	
Created by Me	Opportunities Details		Private Dashboards	Hazari Ajay Kumar	4/12/2023, 11:57 PM	
Private Dashboards	Opportunity details		Private Dashboards	Hazari Ajay Kumar	4/12/2023, 11:48 PM	

All Dashboards

FOLDERS