

URBAN COLOR MANAGEMENT SYSTEM

Empowering Colorful Cities

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Abstract

Urban Color Management System is a specialized Customer Relationship Management (CRM) application designed to manage and coordinate color schemes within urban environments. With the growing emphasis on aesthetic appeal in city planning, managing the diversity of colors across various urban structures—such as buildings, public spaces, and street furniture—has become a complex task. This system provides a comprehensive solution for city planners, architects, and urban developers to maintain and update color schemes effectively. The system offers features like color palette management, project tracking, and stakeholder communication, all within an intuitive interface. By integrating with existing urban planning tools, the Urban Color Management System enhances collaboration between different teams and ensures consistent color application across projects. Key benefits include improved efficiency in project management, better communication among stakeholders, and the ability to maintain a cohesive visual identity across urban spaces. This system aims to contribute to the creation of visually appealing cities that reflect a harmonious blend of tradition and modernity.

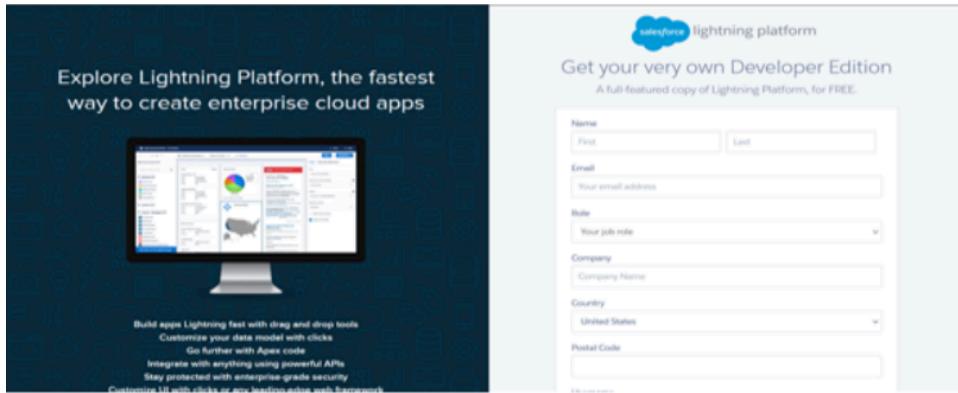
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1. Creating a Developer Account in Salesforce

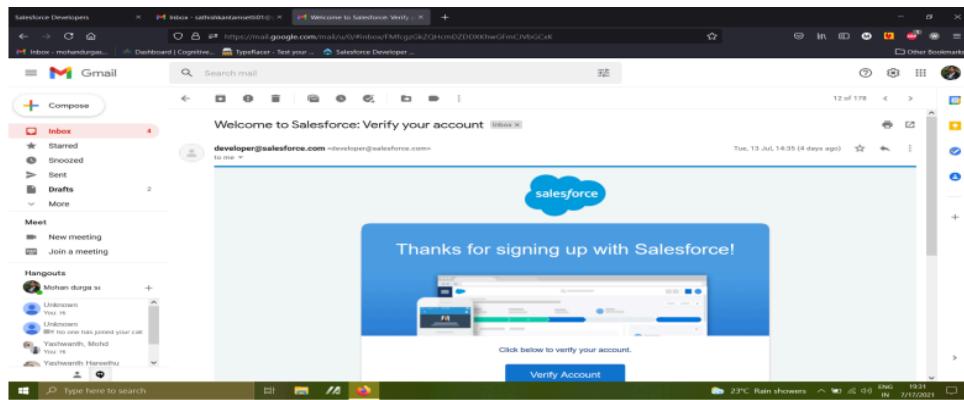
Step 1: Sign Up for a Developer Org

1. Go to [todevelopers.salesforce.com/signup](https://www.developers.salesforce.com/signup).
2. Click on "Sign Up."
3. Fill out the Sign-Up Form with the following details:
 - First Name & Last Name
 - Email
 - Role: Developer
 - Company: [Your College Name]
 - Country: India
 - Postal Code: [Your Pin Code]
 - 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 detail



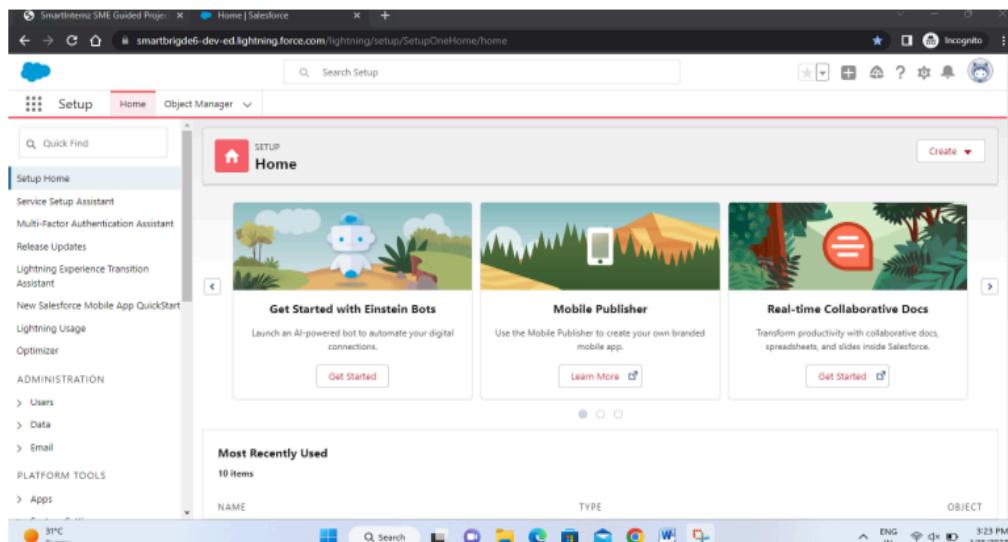
Step 2: Account Activation

1. Go to your email inbox that you used for signing up.
2. Find the verification email from Salesforce and click on the "Verify Account" link to activate your account.
- 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 username and password created during the sign-up process.
3. Login to access your Salesforce Developer account.
 - 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.

2.1.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:

- Label: Our Customer
- Plural Label: Our Customers
- Record Name: Our Customer

2. Check the following boxes:

- Allow Reports
- Allow Search

3. 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 search bar.
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

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 "Consultants" Object

1. On the Custom Object Definition page, enter the following details:
 - Label: Consultant
 - Plural Label: Consultants
 - Record Name: Consultant
2. Check the following boxes:
 - Allow Reports
 - 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 search bar.
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

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 "Retailers" Object

1. On the Custom Object Definition page, enter the following details:

- Label: Retailer
- Plural Label: Retailers
- Record Name: Retailer

2. Check the following boxes:

- Allow Reports
- 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 search bar.
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

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 "Others" Object

1. On the Custom Object Definition page, enter the following details:

- Label: Other
 - Plural Label: Others
 - Record Name: Other
2. Check the following boxes:

- Allow Reports
- 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 search bar.
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

3.2. Fields in Consultants objects

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

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

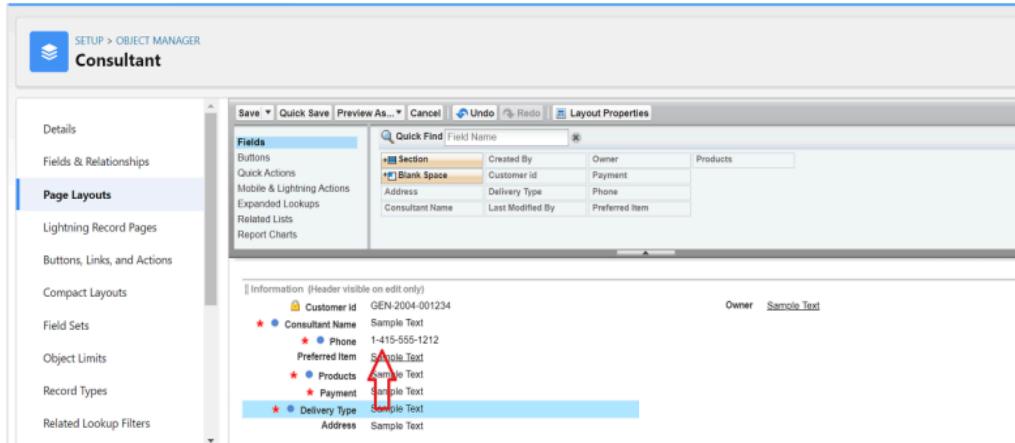
In Salesforce, page layouts define the organization and arrangement of fields, buttons, related lists, and other components on an object's detail and edit pages. They allow you to control the user interface and tailor it to meet the specific needs of your organization.

Page Layout Creation

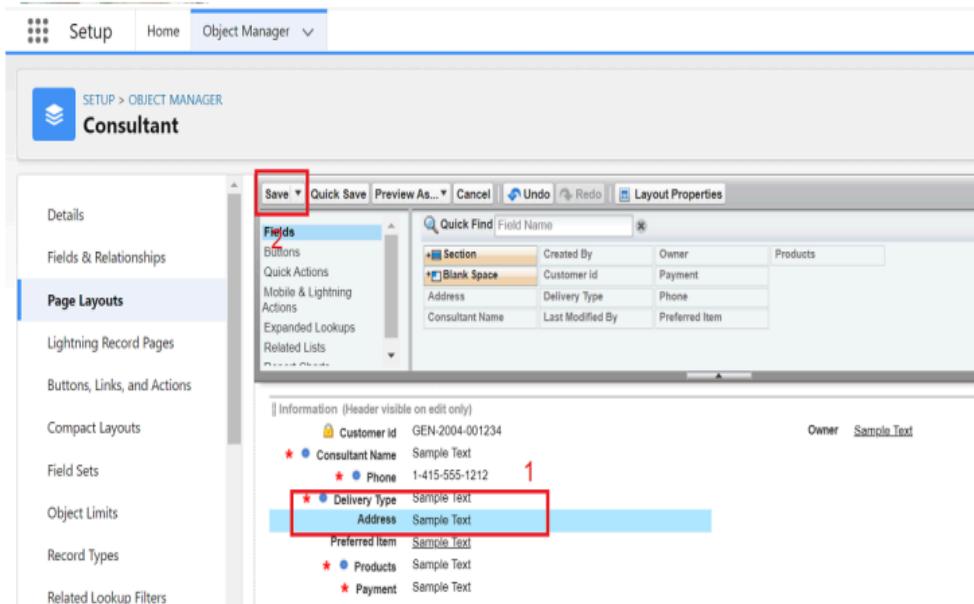
1. From the Salesforce setup menu, go to "Object Manager" and select the Consultants object.
2. Click on "Page Layouts" in the left sidebar. This will display a list of available page layouts for the selected object.
3. Select the Consultant Layout page layout

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

4. Click and drag the Delivery Type and Address fields below the Phone field.



5. Click on Save



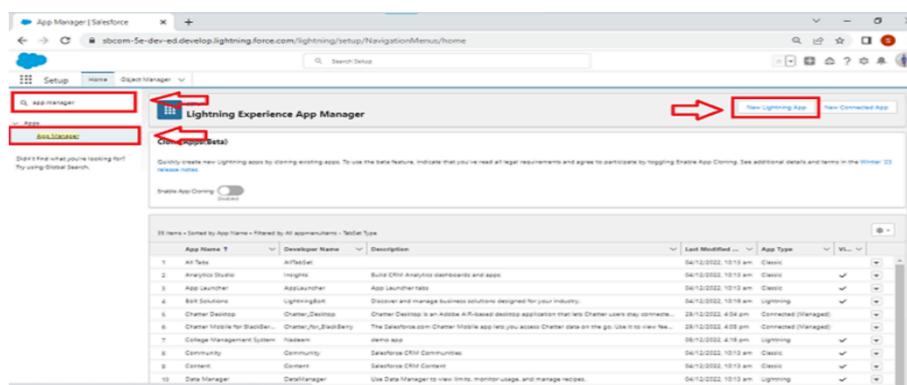
5.The Lightning App

An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar. Lightning apps let you brand your apps with a custom Color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app.

5.1.Create a Lightning App

To create a Lightning app page:

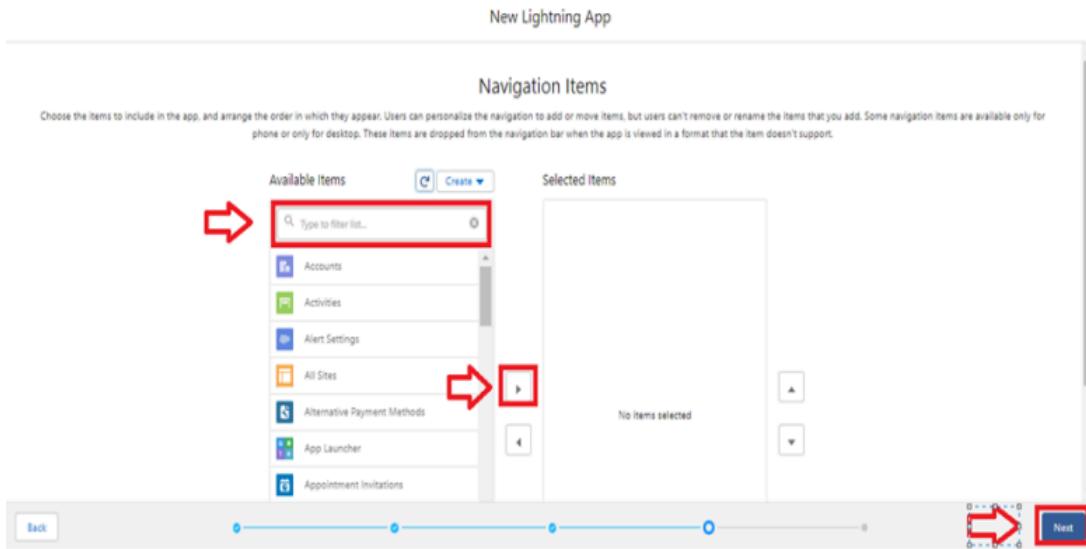
1. Go to the Setup page.
2. In the Quick Find search bar, type “App Manager” and select “App Manager.”
3. Click on New Lightning App.
 - Fill the app name as Urban Color in App Details and Branding.
 - Click Next.
 - On the App Options page, keep the settings as default.
 - Click Next.
 - On the Utility Items page, keep the settings as default



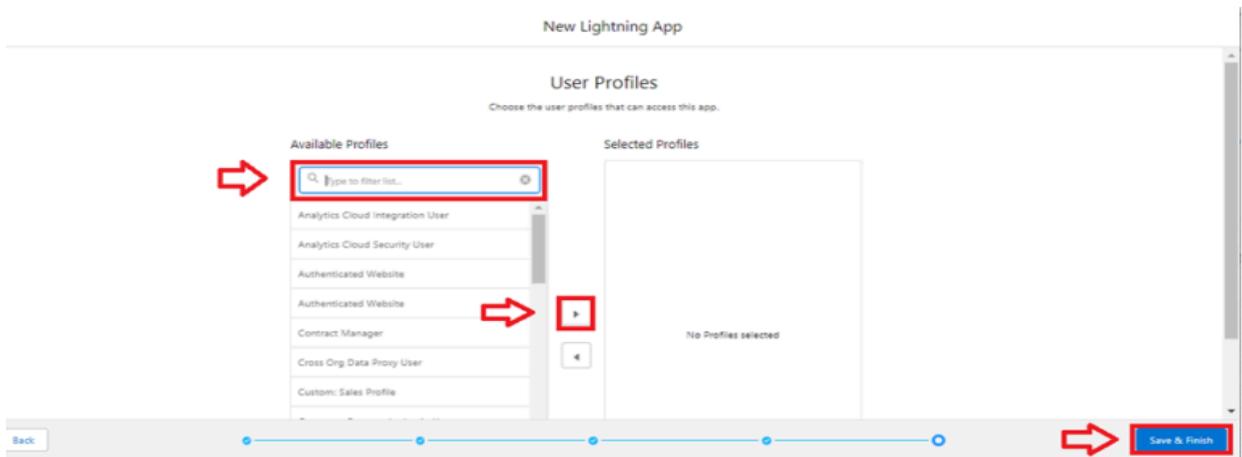
- Click Next

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.



1. Search for profiles (System Administrator) in the search bar.
2. click on the arrow button and add to the profile and click on save and finish



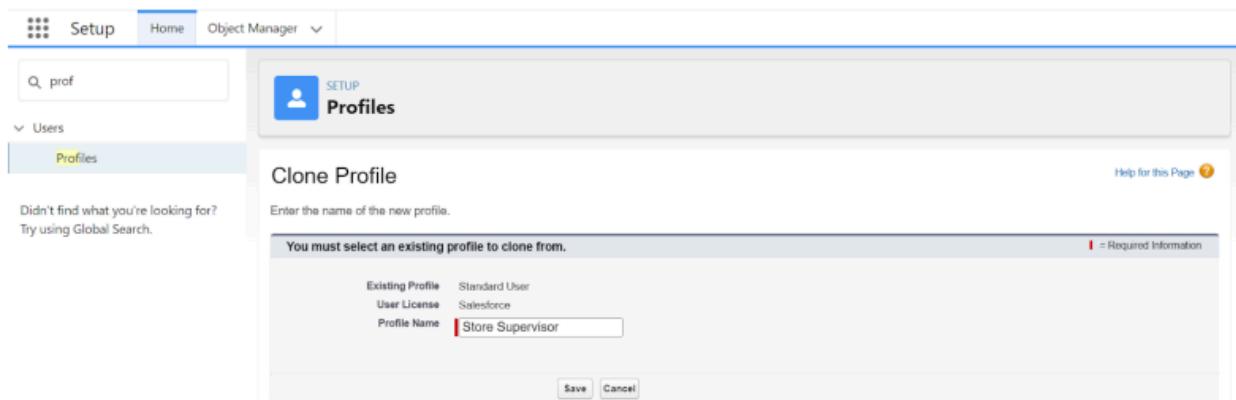
6.Profile

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:

1. From Setup, enter Profiles in the Quick Find box, and select Profiles.
2. From the list of profiles, find Standard User.
3. Click Clone.
4. For Profile Name, enter Store Supervisor.
5. Click Save.



The screenshot shows the Salesforce Setup interface. In the top navigation bar, 'Setup' is selected. The search bar contains 'prof'. On the left sidebar, 'Profiles' is selected under the 'Users' category. The main content area has a title 'Clone Profile' and a sub-instruction 'Enter the name of the new profile.' Below this, a message says 'You must select an existing profile to clone from.' A table shows 'Existing Profile' as 'Standard User', 'User License' as 'Salesforce', and 'Profile Name' as 'Store Supervisor'. At the bottom are 'Save' and 'Cancel' buttons.

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

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

Profile Detail

Name	Store Supervisor
User License	Salesforce
Description	

Custom Profile

Service Provider Access

Tab Settings

Overwrite users' personal 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.

The screenshot shows the Salesforce Setup interface under the Profiles section. A search bar at the top left contains the text "Q profi". The main content area displays the "Store Supervisor" profile details. The profile name is "Store Supervisor", user license is "Salesforce", and it is a "Custom Profile" (indicated by a checked checkbox). Below the profile detail, there is a table of custom object permissions. The "Consultants" object has checkboxes checked for most columns, while other objects like "Others", "Our Customers", and "Retailers" have checkboxes checked for all columns.

Object	Read	Create	Edit	Delete	API	Batch
Async Operation Results	<input type="checkbox"/>					
Back Syncs	<input 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"/>					
Others	<input checked="" type="checkbox"/>					
Our Customers	<input checked="" type="checkbox"/>					
Pipelines	<input type="checkbox"/>					
Pipeline Stages	<input type="checkbox"/>					
Projects	<input type="checkbox"/>					
Properties	<input type="checkbox"/>					
Remote Changes	<input type="checkbox"/>					
Rentals	<input type="checkbox"/>					
Repositories	<input type="checkbox"/>					
Retailers	<input checked="" type="checkbox"/>					
Semesters	<input type="checkbox"/>					
Source Member References	<input type="checkbox"/>					

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

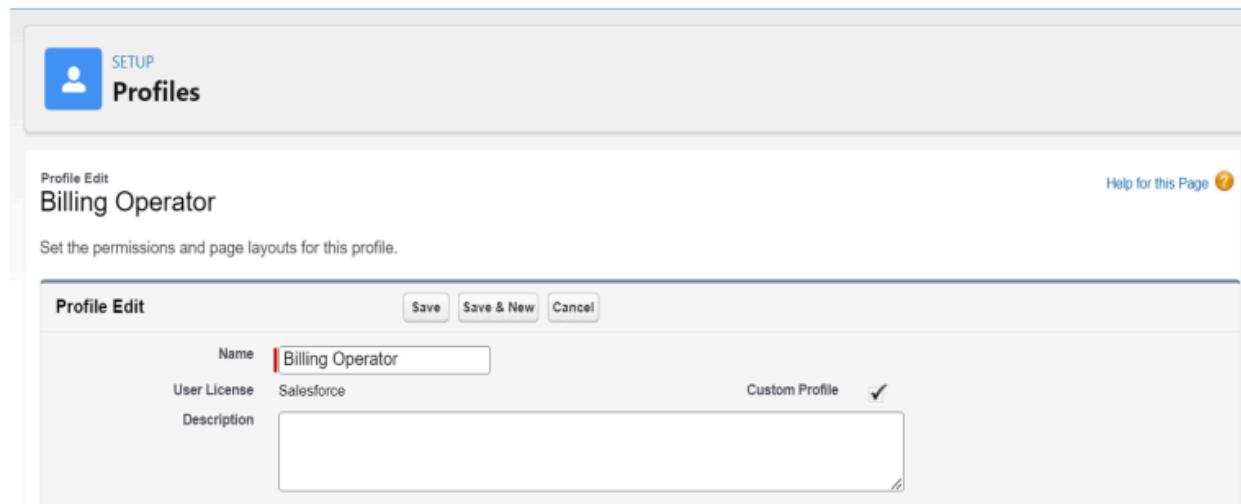
9. Click on Save

The screenshot shows the "Consultants" object permissions section. It lists various standard and custom objects and their permissions. For each object, there are checkboxes for Read, Create, Edit, Delete, API, and Batch operations. The "Consultants" object has checkboxes checked for all operations, while other objects like "Others", "Our Customers", and "Retailers" also have checkboxes checked for all operations.

Object	Read	Create	Edit	Delete	API	Batch
Async Operation Results	<input type="checkbox"/>					
Back Syncs	<input 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"/>					
Others	<input checked="" type="checkbox"/>					
Our Customers	<input checked="" type="checkbox"/>					
Pipelines	<input type="checkbox"/>					
Pipeline Stages	<input type="checkbox"/>					
Projects	<input type="checkbox"/>					
Properties	<input type="checkbox"/>					
Remote Changes	<input type="checkbox"/>					
Rentals	<input type="checkbox"/>					
Repositories	<input type="checkbox"/>					
Retailers	<input checked="" type="checkbox"/>					
Semesters	<input type="checkbox"/>					
Source Member References	<input type="checkbox"/>					

Similarly, Create an Operator Profile:

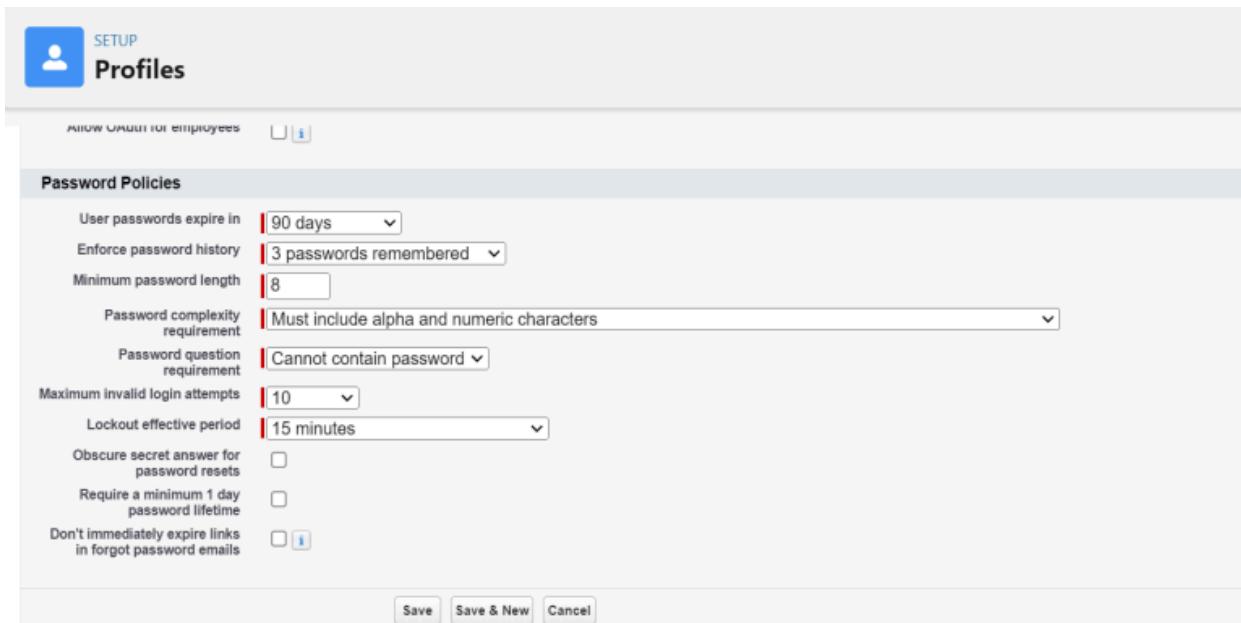
1. Clone the Salesforce Platform user profile.
2. Give access only for Billing Operator
3. Click on save



Billing Operator

Set the permissions and page layouts for this profile.

Profile Edit		Save	Save & New	Cancel
Name	Billing Operator			
User License	Salesforce	Custom Profile <input checked="" type="checkbox"/>		
Description				



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	<input type="checkbox"/>
Require a minimum 1 day password lifetime	<input type="checkbox"/>
Don't immediately expire links in forgot password emails	<input type="checkbox"/> 

Allow custom for employees 

Save Save & New Cancel

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.

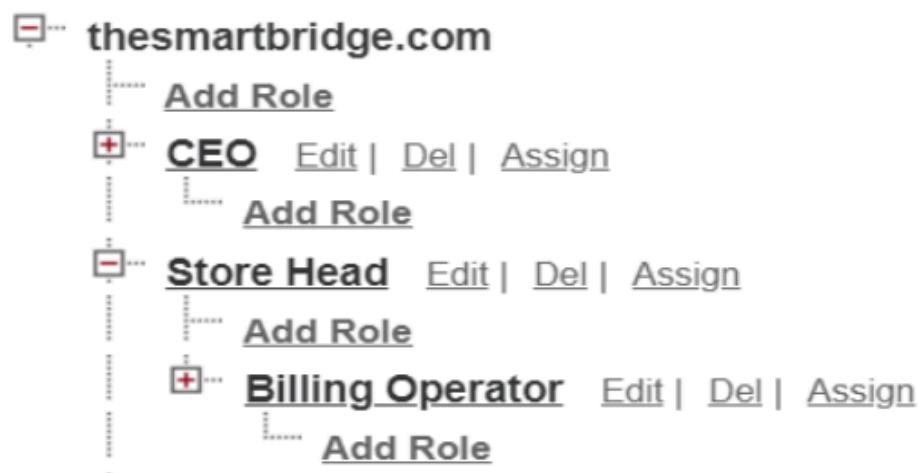
Similarly, create one role under Store Head as Billing Operator

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar contains the text 'roles'. The left sidebar is expanded, showing 'Users' with 'Roles' selected, 'Feature Settings', 'Sales' (with 'Contact Roles on Contracts' and 'Contact Roles on Opportunities'), and 'Service' (with 'Case Teams' containing 'Case Team Roles' and 'Contact Roles on Cases'). The main content area is titled 'SETUP Roles' and shows a 'New Role' form. The 'Role Edit' section contains fields for 'Label' (set to 'Store Head') and 'Role Name' (set to 'Store_Head'). Below these, a 'This role reports to' field is populated with 'thesmartbridge.com'. A note below says 'Role Name as displayed on reports' followed by an empty input field. At the bottom of the form are 'Save', 'Save & New', and 'Cancel' buttons.

The screenshot shows the Salesforce Setup interface. The left sidebar has a tree view with 'Users' expanded, showing 'Roles' selected. Under 'Sales', there are links to 'Contact Roles on Contracts', 'Contact Roles on Opportunities', and 'Case Teams'. Under 'Service', there is a link to 'Case Team Roles'. A search bar at the top left contains the query 'roles'. The main content area is titled 'SETUP Roles' and shows a 'New Role' form. The form has fields for 'Label' (set to 'Billing Operator'), 'Role Name' (set to 'Billing_Operator'), 'This role reports to' (set to 'Store Head'), and 'Role Name as displayed on reports' (empty). At the bottom are 'Save', 'Save & New', and 'Cancel' buttons. A 'Help for this Page' link is in the top right corner.

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.

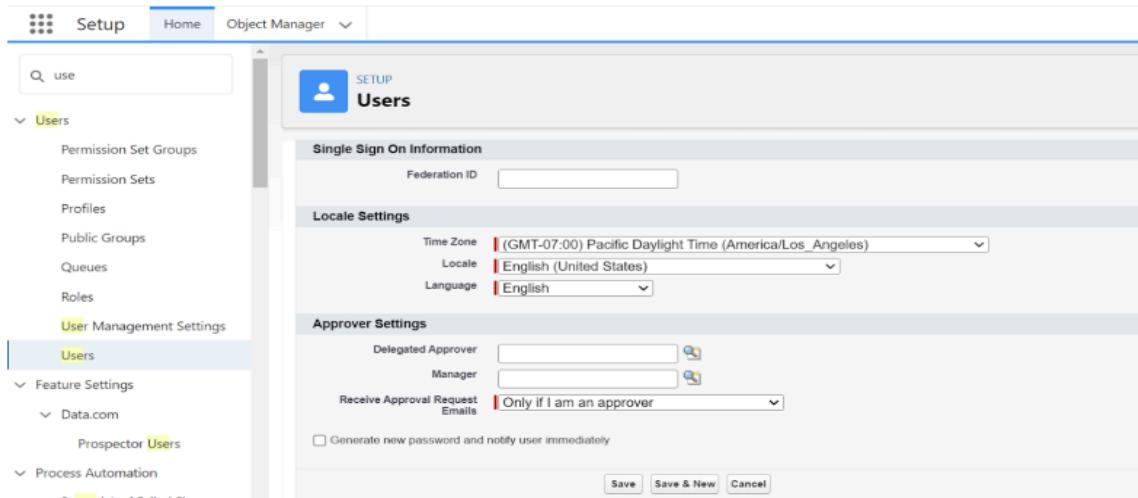
Creating a User:

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, UserLicense, Profile). and click on save

The screenshot shows the Salesforce Setup interface for creating a new user. The left sidebar is collapsed, and the main area displays the 'User Edit' screen under the 'Users' section of the 'User Management Settings' category. The 'General Information' tab is selected. The user details entered are:

Field	Value
First Name	Amar
Last Name	k
Alias	ak
Email	mailid@gmail.com
Username	amark2133@salesforce.com
Nickname	User167161323313747430
Title	Store Supervisor
Company	
Department	
Division	

On the right side, the user's role is set to 'Store Head', license to 'Salesforce', and profile to 'Store Supervisor'. The 'Active' checkbox is checked. A note at the bottom right indicates that Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, and WDC User checkboxes are optional.



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

User Edit

General Information

First Name	John
Last Name	Teddy
Alias	tedd
Email	teddyjohn@gmail.com
Username	johnteddy@salesforce.com
Nickname	User167160299867441831
Title	Vehicle Manager
Company	
Department	
Division	

Advanced Settings

Role	Billing Operator
User License	Salesforce Platform
Profile	Billing Operator
Active	<input checked="" type="checkbox"/>
Marketing User	<input type="checkbox"/>
Office User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
How User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>
Site.com Publisher User	<input type="checkbox"/>
WDC User	<input type="checkbox"/>
Data.com User Type	None...
Data.com Monthly Address Limit	300
Accessibility Mode (Classic Only)	<input type="checkbox"/>
High Contrast Palette on Charts	<input type="checkbox"/>
Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
Debug Mode	<input type="checkbox"/>
Make Setup My Default Landing Page	<input type="checkbox"/>

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
<input type="checkbox"/> 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.

The screenshot shows the Salesforce App Launcher interface. A red box labeled '1' highlights the 'Urban Color' app icon. A red box labeled '2' highlights the search bar containing the text 'urban'. The search results show one item: 'Urban Color' under the 'Apps' category.

The screenshot shows the 'Our Customers' list view. A red box labeled '1' highlights the 'Our Customers' tab in the top navigation bar. A red box labeled '2' highlights the 'New' button in the top right corner of the list view. The list view displays a single row with the text 'Customer Name'.

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

* Customer Name
[Red box surrounds this field]

Complete this field.

Owner
Hazari Ajay Kumar

Customer id

* Phone
[Red box surrounds this field]

Email id
[Red box surrounds this field]

Address

Cancel Save & New **Save** [Red box surrounds this button]

Urban Color **Our Customers** Consultants Retailers others

Our Customers Recently Viewed 1

2 items • Updated a few seconds ago

	Customer Name
1	Suresh 2
2	Kamal

New Import Change Owner

Search this list...

Our Customer Suresh

Related	Details
Customer Name	Suresh
Customer id	5
Phone	97583873728
Email id	suresh@gmail.com
Address	Hyderabad
Additional Information	Customer

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.

This screenshot shows the 'Our Customers' list view in a CRM application. The top navigation bar includes 'Urban Color', 'Our Customers' (highlighted with a red box and labeled '1'), 'Consultants', 'Retailers', and 'others'. The main area displays a list of customers with columns for 'Customer Name' and a checkbox. Two items are listed: '1 Suresh' and '2 Kamal'. A search bar at the top right says 'Search...'. On the far right, there are buttons for 'New', 'Import', and 'Change Owner'. Below the list is a toolbar with various icons. A context menu is open over the 'Kamal' row, labeled '3', with options 'Edit' and 'Delete' (highlighted with a red box). The 'Delete' option has a sub-option 'Delete'.

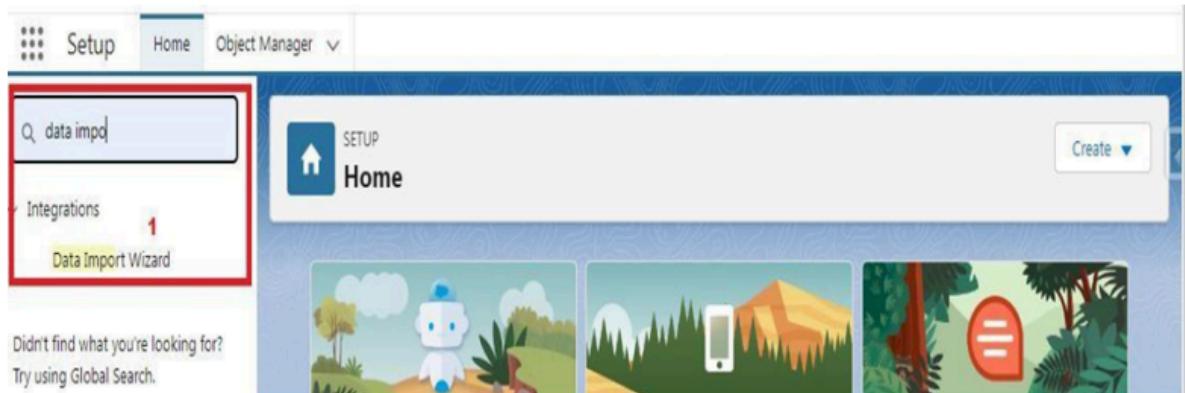
This screenshot shows a confirmation dialog box titled 'Delete Our Customer'. The message inside asks, 'Are you sure you want to delete this Our Customer?'. At the bottom are two buttons: 'Cancel' and 'Delete' (highlighted with a red box). The background shows the same 'Our Customers' list view as the previous screenshot, with the 'Kamal' row selected.

10. Import Data

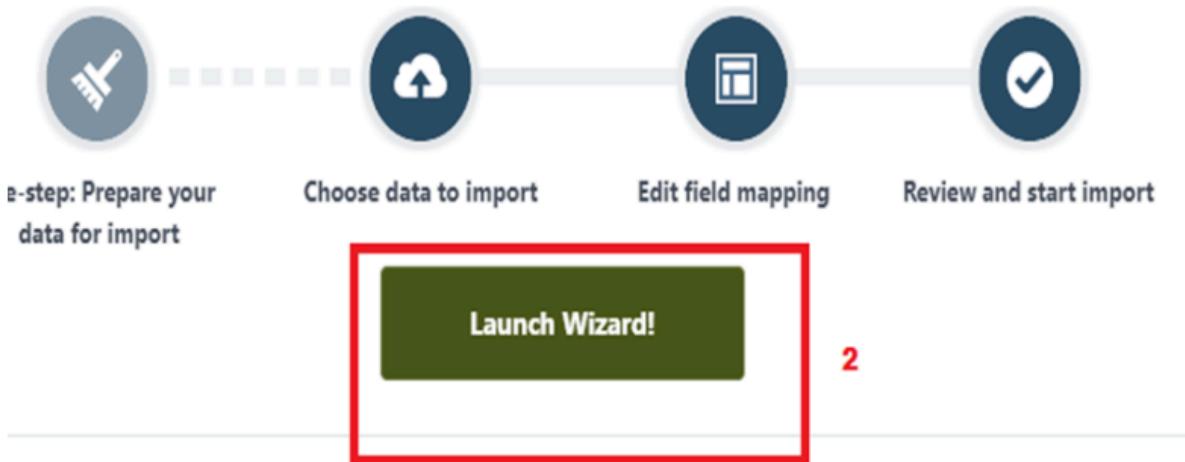
Data Import Wizard—This tool, accessible through the Setup menu, allows you to import data into common standard objects such as Contacts, Leads, Accounts, as well as data into custom objects.

To Import Data

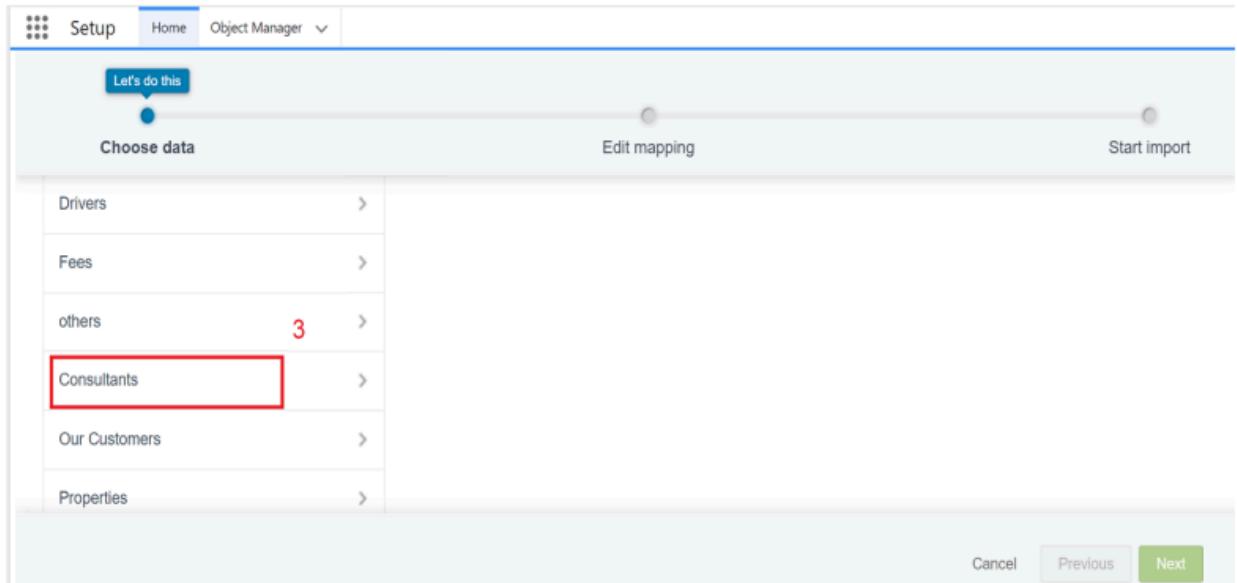
1. From Setup, click the Home tab.
2. In the Quick Find box, enter Data Import and select Data Import Wizard.



3. Click **Launch Wizard!**



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

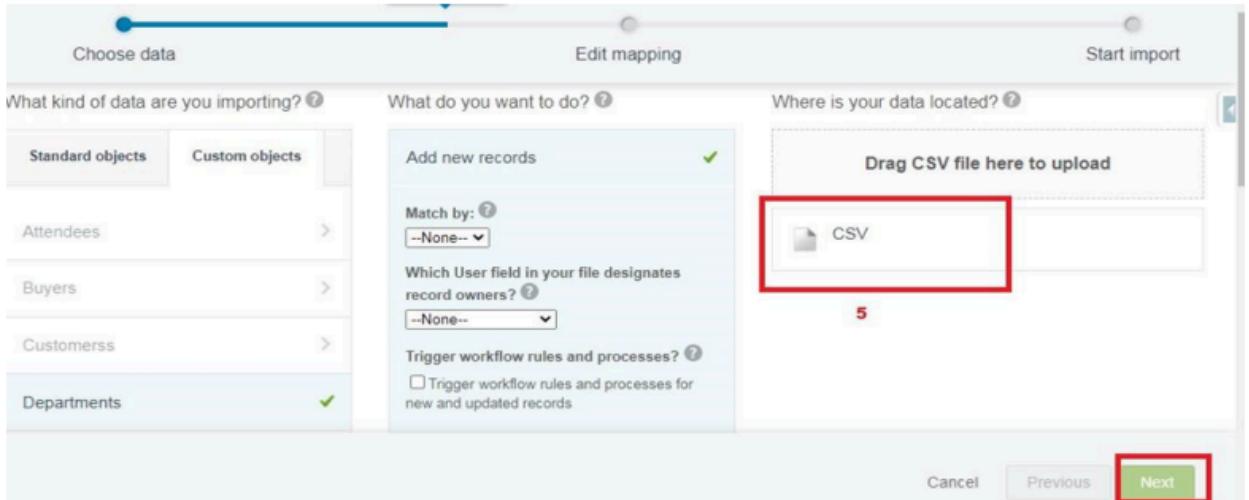


5. Select Add New Records.
6. Click CSV and choose the file Consultant_CS1 which was created earlier. Click Next

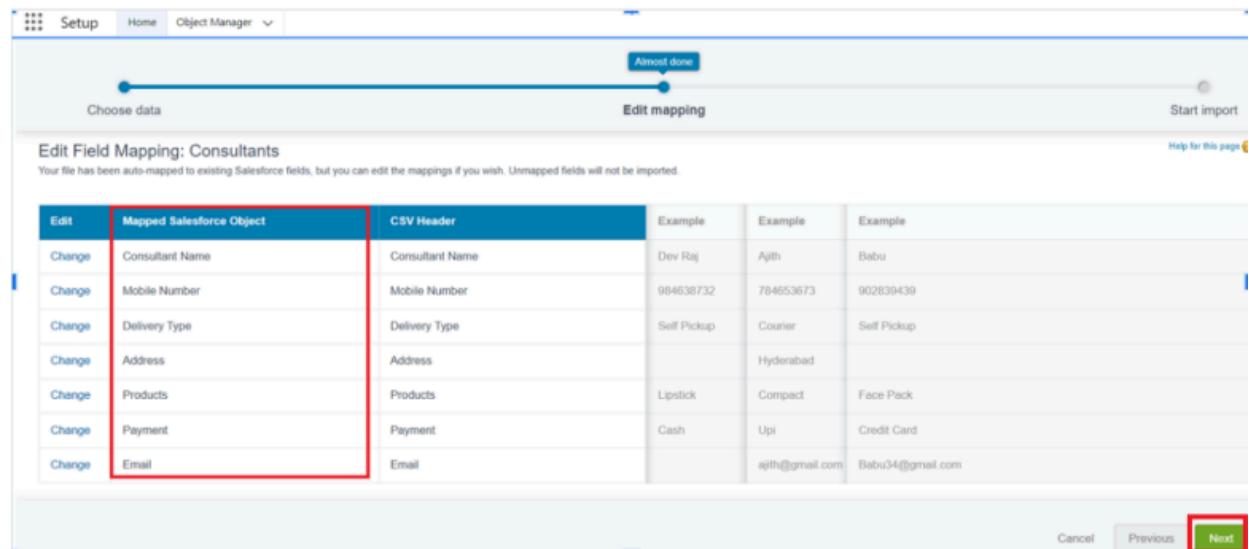
Import your Data into Salesforce

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

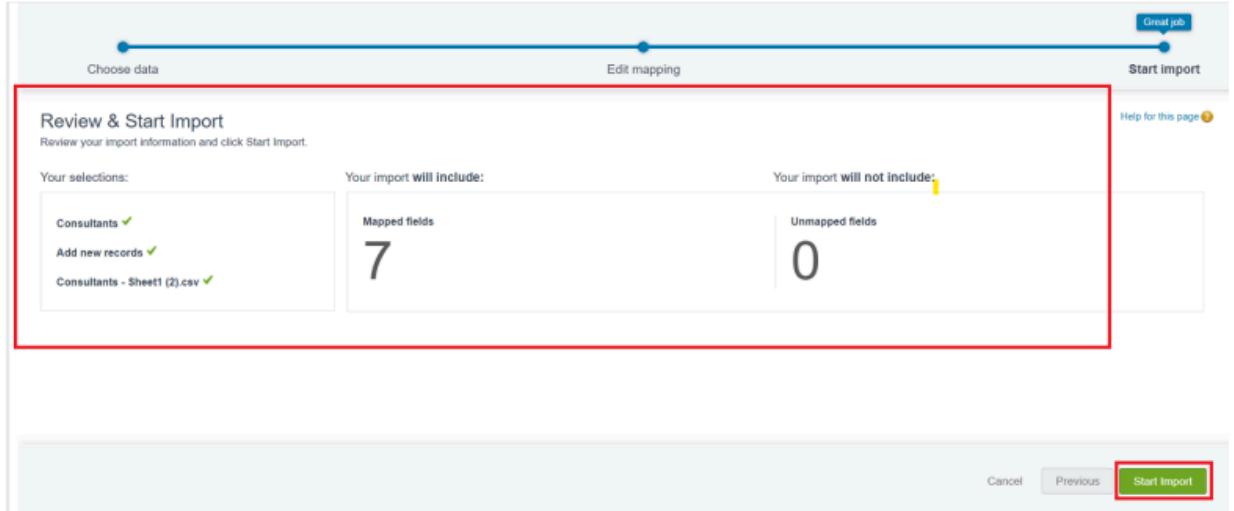
This screenshot shows the 'Import your Data into Salesforce' interface. It has three main sections: 'What kind of data are you importing?' (Standard objects, Custom objects), 'What do you want to do?' (Add new records, Update existing records, Add new and update existing records), and 'Where is your data located?'. The 'Add new records' option under the 'What do you want to do?' section is highlighted with a red box and a red number '4'.



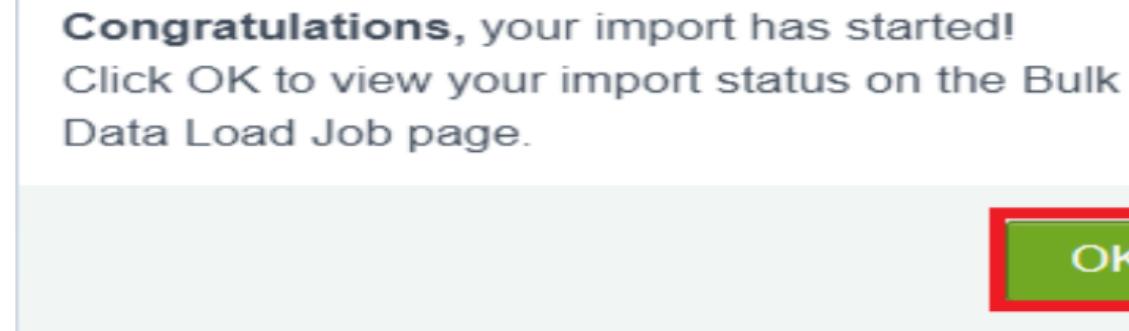
7. Since the field names in the CSV file (CSV Header) are the same as the field names in your object (Mapped Salesforce Object), the fields are automatically mapped. Click Next.



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



9. Click OK on the popup.



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	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 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:

- The most basic report format, displaying rows of records in a table with a grand total.
- Easy to set up but cannot be used to create groups of data or charts and cannot be used in Dashboards.
- Primarily used to generate simple lists or lists with a grand total.

2. Summary Reports:

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

3. Matrix Reports:

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

4. Joined Reports:

- Allows the creation of different views of data from multiple report types.
- Data in joined reports is organized in blocks, each acting as a subreport with its own fields, columns, sorting, and filtering.
- 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.

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

There are 2 types of report types:

1. Standard Report Types:

- Automatically included with standard objects and custom objects where "Allow Reports" is checked.
- Cannot be customized and automatically include standard and custom fields for each object within the report type.
- Created when an object or a relationship is created.
- Note: Standard report types always have inner joins.

2. Custom Report Types:

- Created by an administrator or user with "Manage Custom Report Types" permission when standard report types cannot specify which records will be available in reports.
- Allows specification of objects that will be available in a particular report.
- The primary object must have a relationship with other objects present in the report type, either directly or indirectly.

There are 3 types of access levels for folders:

1. Viewer:

- Users can see the data in a report but cannot make any changes except cloning it into a new report.

2. Editor:

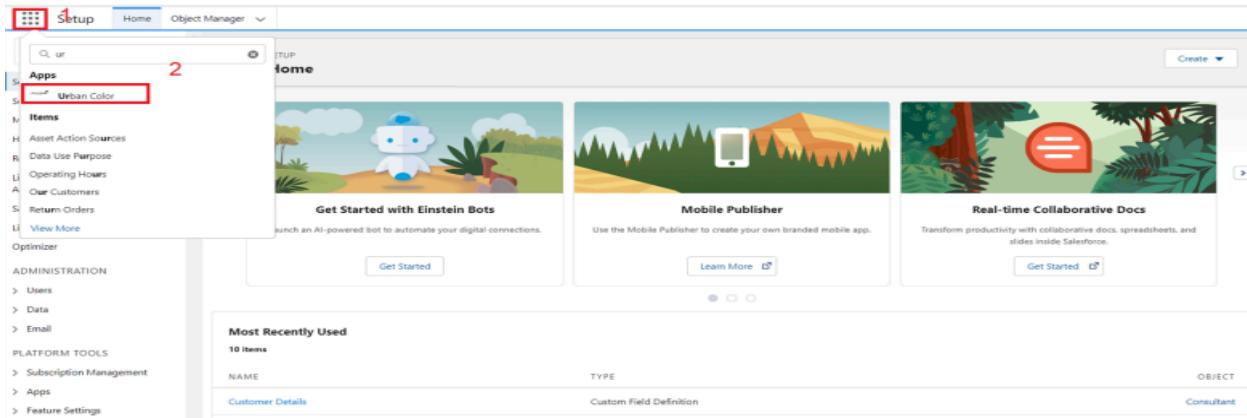
- Users can view and modify the reports and move them to/from any other folders they have access to as Editor or Manager.

3. Manager:

- Users can do everything Viewers and Editors can do, plus control other users' access levels to the folder.
- 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.
7. Click the drop-down option on 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 and name it Cash.

The screenshot shows the Salesforce Reports interface. At the top, there's a navigation bar with 'Urban Color', 'Our Customers', 'Consultants', 'Retailers', 'others', 'Reports', 'Dashboards'. A red box labeled '1' highlights the 'Reports' dropdown. Below it, a search bar says 'Search recent reports...' and a 'New Report' button is highlighted with a red box labeled '2'. The main area shows a table with columns: Report Name, Description, Folder, Created By, Created On, Subscribed. Under 'Report', it says 'New Consultants Report' and 'Consultants'. On the left, there's a 'Fields' sidebar with 'Groups', 'Add group...', 'Columns' (highlighted with a red box), 'Consultant: Consultant Name', 'Delivery Type', 'Products', and 'Payment'. The main table preview shows 9 rows of data:

	Consultant: Consultant Name	Delivery Type	Products	Payment
1	Dev Raj	Self Pickup	Lipstick	Cash
2	Ajith	Courier	Compact	Upi
3	Babu	Self Pickup	Face Pack	Credit Card
4	Chitra	Courier	Eye Liner	Debit Card
5	Swathi	Courier	Nail Polish	Upi
6	Praaad	Self Pickup	Eye Liner	Upi
7	Ajay Kumar	Courier	Up-Balm	Debit Card
8	Shankar	Self Pickup	Face Pack	Cash
9	Sandeep	Courier	Eye Liner	Upi

The screenshot shows the 'Fields' panel on the left with sections for Groups, Columns, and specific fields like Consultant Name, Delivery Type, Products, and Payment. A context menu is open over the 'Payment' field, with the 'Bucket This Column' option highlighted by a red box labeled '1'. Other options in the menu include Sort Ascending, Sort Descending, Group Rows by This Field, Group Columns by This Field, Show Unique Count, Move Left, Move Right, and Remove Column.

Edit Bucket Column

The dialog shows the 'Field' set to 'Payment' and the 'Bucket Name' set to 'Payment type'. The 'All Values (4)' section lists 'Unbucketed Values (4)': Credit Card, Debit Card, Upi, and Cash. The 'Bucket' section shows a table with columns 'VALUE' and 'BUCKET'. The values 'Credit Card', 'Debit Card', 'Upi', and 'Cash' are listed under the 'BUCKET' column. A checkbox 'Bucket remaining values as Other' is present. Buttons for 'Add Bucket', 'Move To', 'Cancel', and 'Apply' are at the bottom.

VALUE	BUCKET
Credit Card	
Debit Card	
Upi	
Cash	

Edit Bucket Column

This screenshot is similar to the previous one but includes annotations: a red box labeled '1' covers the 'Bucket remaining values as Other' checkbox, and a red box labeled '2' covers the 'Bucket Name' input field which contains 'Payment type'.

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

* Field * Bucket Name

All Values (4)		Search Values	
		<input type="text"/> <input type="button" value="Search"/>	
<input type="checkbox"/> Net Banking (0)	<input type="button" value="Edit"/> <input type="button" value="Delete"/>	<input type="checkbox"/> VALUE	BUCKET
<input type="checkbox"/> Cash (0)	<input type="button" value="Edit"/> <input type="button" value="Delete"/>	<input type="checkbox"/> Credit Card	
		<input type="checkbox"/> Debit Card	
		<input type="checkbox"/> Upi	
		<input type="checkbox"/> Cash	
Unbucketed Values (4)			
<input type="checkbox"/> Bucket remaining values as Other			
<input type="button" value="Add Bucket"/>		<input type="button" value="Move To"/> <input type="button" value="▼"/>	
<input type="button" value="Cancel"/> <input type="button" value="Apply"/>			

Edit Bucket Column

* Field * Bucket Name

All Values (4)		Search Values	
		<input type="text"/> <input type="button" value="Search"/>	
<input type="checkbox"/> Net Banking (0)	<input type="button" value="Edit"/> <input type="button" value="Delete"/>	<input type="checkbox"/> VALUE	BUCKET
<input type="checkbox"/> Cash (0)	<input type="button" value="Edit"/> <input type="button" value="Delete"/>	<input checked="" type="checkbox"/> Credit Card	
		<input checked="" type="checkbox"/> Debit Card	
		<input checked="" type="checkbox"/> Upi	
		<input type="checkbox"/> Cash	
Unbucketed Values (4)			
<input type="checkbox"/> Bucket remaining values as Other			
<input type="button" value="Add Bucket"/>		<input type="button" value="Move To"/> <input type="button" value="▼"/>	

Edit Bucket Column

* Field * Bucket Name

All Values (4)		Search Values	
		<input type="text"/> <input type="button" value="Search"/>	
<input type="checkbox"/> Net Banking (3)	<input type="button" value="Edit"/> <input type="button" value="Delete"/>	<input checked="" type="checkbox"/> VALUE	BUCKET
<input type="checkbox"/> Cash (1)	<input type="button" value="Edit"/> <input type="button" value="Delete"/>	<input checked="" type="checkbox"/> Cash	Cash
Unbucketed Values (0)			
<input type="checkbox"/> Bucket remaining values as Other			
<input type="button" value="Add Bucket"/>		<input type="button" value="Move To"/> <input type="button" value="▼"/>	
<input type="button" value="Cancel"/> <input type="button" value="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.

15.Click Refresh.

16.Click Save and Run.

17.Give the report a name, e.g., Consultant Report

Consultant: Consultant Name	Delivery Type	Products	Payment
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
Dev Raj	Self Pickup	Lipstick	Cash
Shankar	Self Pickup	Face Pack	Cash
Subtotal			
Total (9)			

Consultant: Consultant Name	Delivery Type	Products	Payment
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
Dev Raj	Self Pickup	Lipstick	Cash
Shankar	Self Pickup	Face Pack	Cash
Subtotal			
Total (9)			

18.Click Save.

Save Report

1
Report Name
Consultants Report

Report Unique Name
Consultants_Report_hvb

Report Description

2
Folder
Private Reports
Select Folder

3
Cancel Save

11.2. View Report

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

1
Setup

2
Urban Color

NAME	TYPE	OBJECT
Customer Details	Custom Field Definition	Consultant

3

Report Name	Description	Folder	Created By	Created On	Subscribed
Consultants Report	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Private Reports	Hazari Ajay Kumar	12/17/2022, 7:50 PM	
Simple Flow Report: Screen Flows	Public Reports	Automated Process		4/12/2023, 11:46 PM	
Opportunities Details	Private Reports	Hazari Ajay Kumar		2/2/2023, 10:39 PM	
Rental New 1	Public Reports	Hazari Ajay Kumar			

4

Recent

REPORTS

Recent

Created by Me

Private Reports

Public Reports

All Reports

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

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
2. Open the Urban Color Application: Launch the application and navigate to the Dashboards tab.
3. Create a New Dashboard:
 - Click on the "New Dashboard" button.
4. Name Your Dashboard:
 - Enter "Consultant Dashboard" in the name field.
 - Click "Create."
5. Add Components to the Dashboard:
 - Click on "+ Component" to add a new component.
 - Select the "Consultants Report" you created earlier

New Dashboard

* Name 3

Description

Folder

Private Dashboards Select Folder 4

Cancel Create

Reports

Recent

Created by Me

Private Reports

Public Reports

All Reports

Folders

Created by Me

Shared with Me

All Folders

Select Report

Search Reports and Folders...

Reports and 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

Cancel Select

6. 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

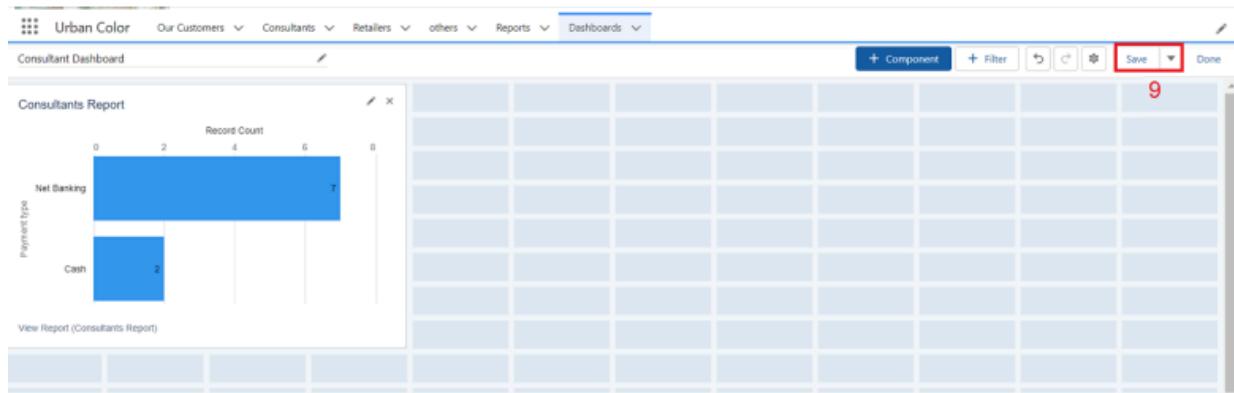
Payment type	Record Count
Net Banking	7
Cash	2

View Report (Consultants Report)

Cancel Add

7. Save Your Dashboard:

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



12.2. View Dashboard

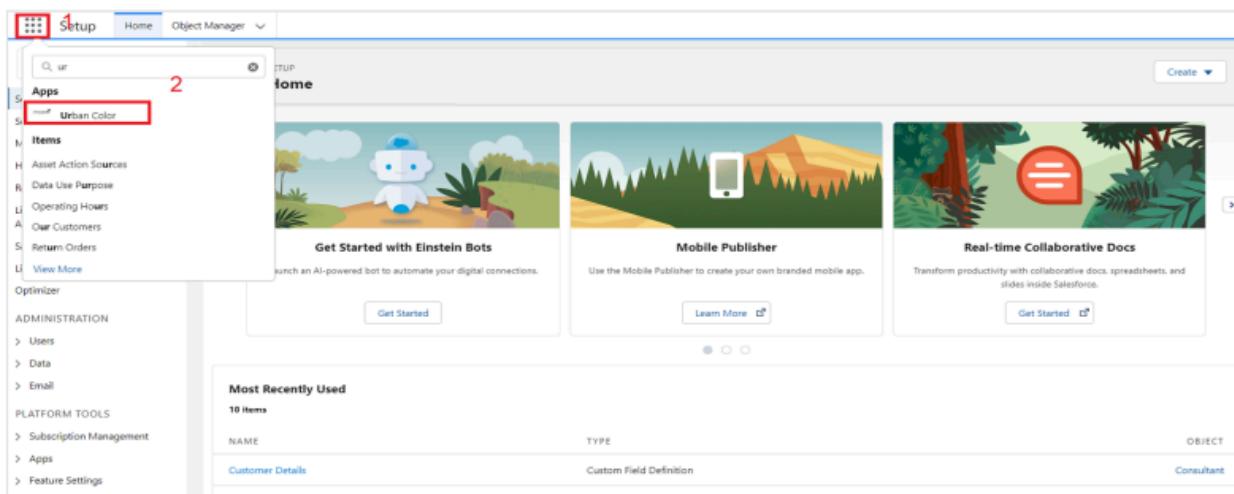
To view the dashboard, follow these steps:

1. Open the App Launcher:

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

2. Search for the Dashboard:

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



3. Navigate to the Dashboard Tab:

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

4. View the Graph:

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