URBAN COLOR MANAGEMENT SYSTEM

Empowering Colorful Cities

Developed by:

KANCHAM KEERTHI REDDY

214G1A0543@srit.ac.in

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.

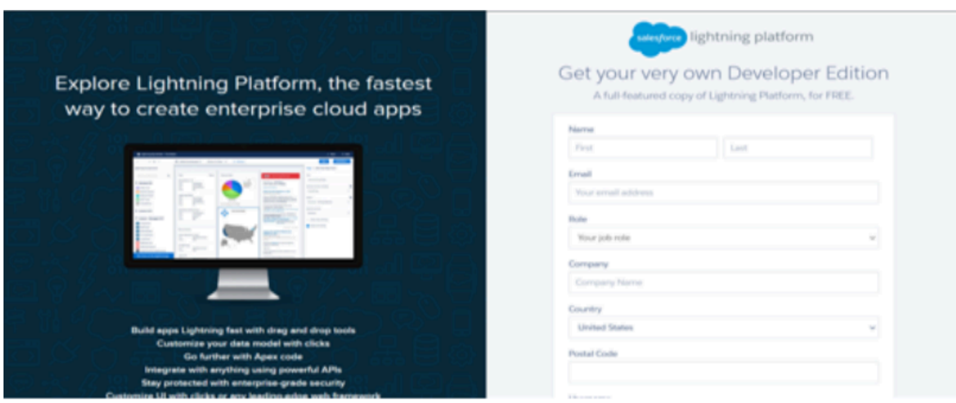
INDEX

CONTENTS **PAGE NO**

1.Creating a Developer Account in Salesforce

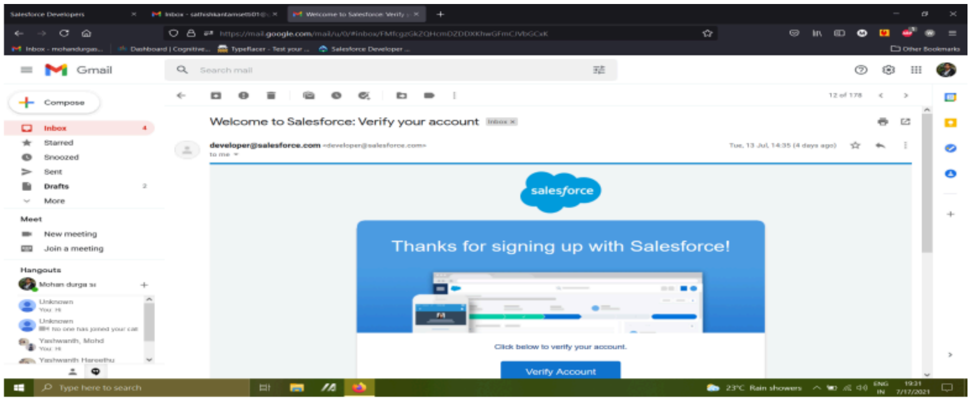
Step 1: Sign Up for a Developer Org

1. Go todevelopers.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



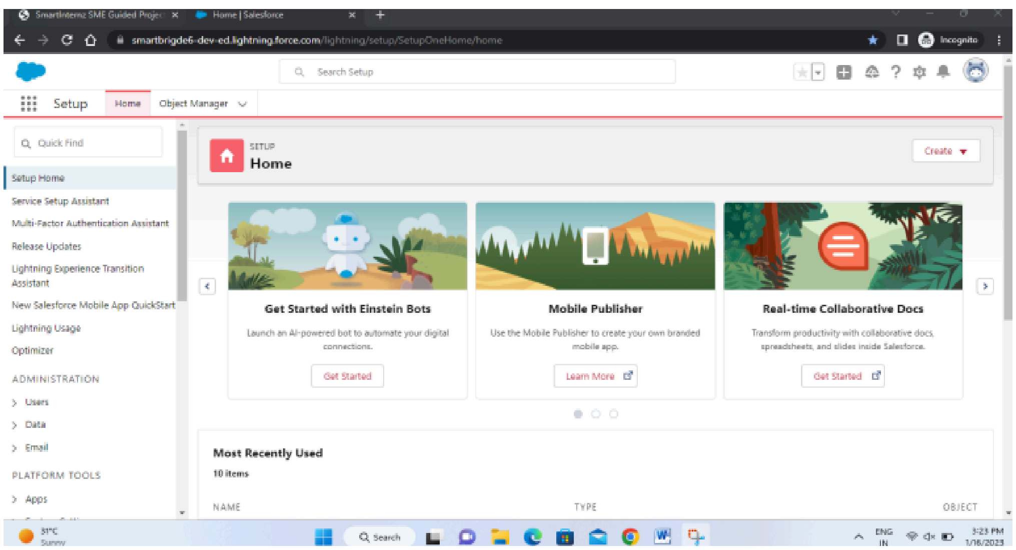
Step 2: Account Activation

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 tologin.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 6)Nail Polish	Multi-Picklist
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:

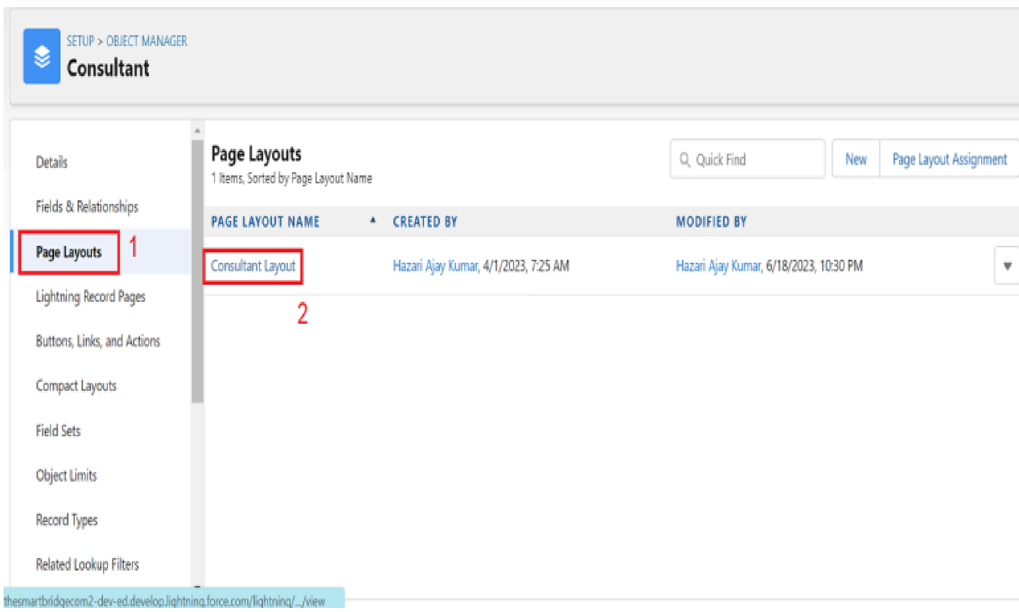
S No	Field Label	Data Type
1	Name	Text
2	Employee 1)Company Employee 2)Staff 3)Special Reference	Picklist
3	Coupon	Text
4	Products 1)Lipstick 2)Compact 3)EyeLiner 4)FacePack 5)Lip Balm 6)Nail Polish	Multi-Picklist

4.Page Layouts

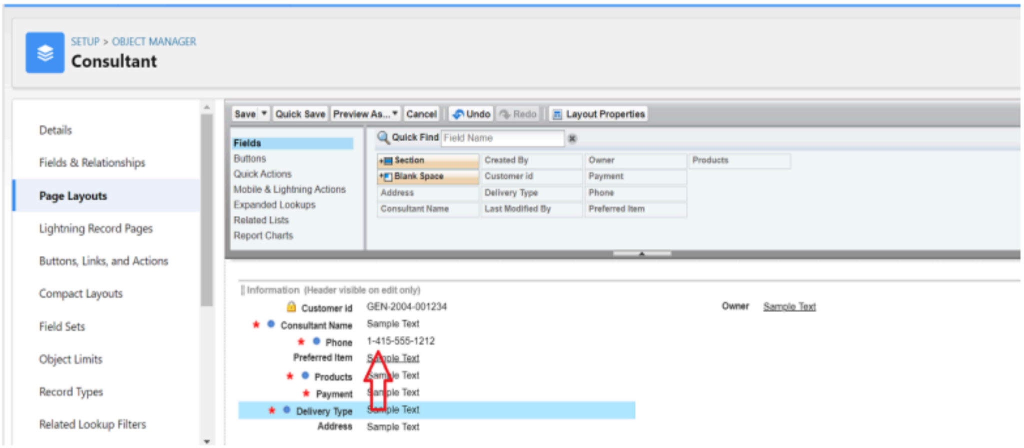
In Salesforce, page layouts define the organization and arrangement of fields, buttons,related lists, and other components on an object's detail and edit pages. They allow you to control the user interface and tailor it to meet the specific needs of your organization.

Page Layout Creation

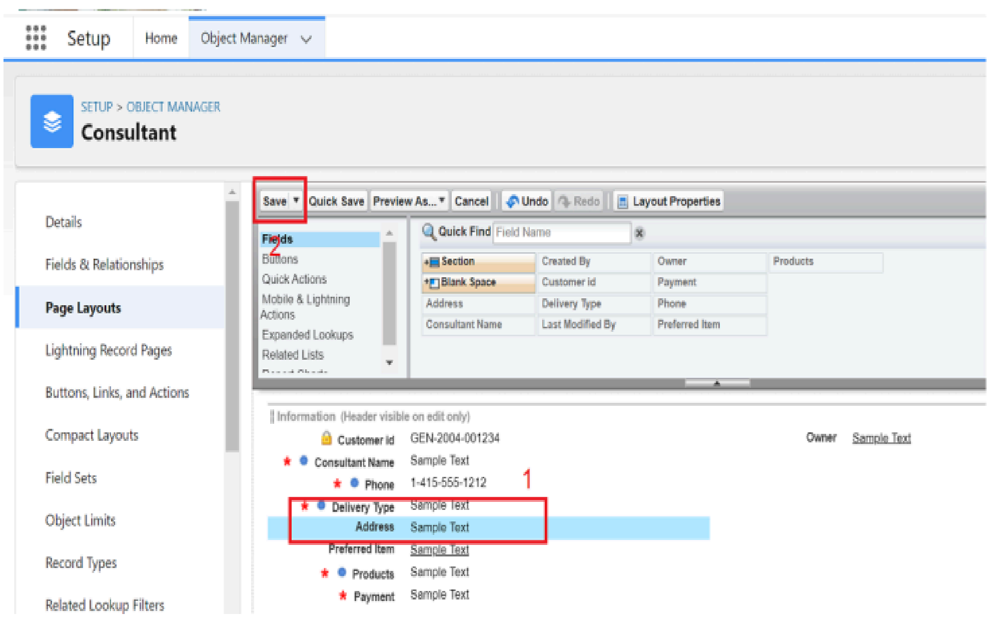
1. From the Salesforce setup menu, go to "Object Manager" and select the Consultants object.
2. Click on "Page Layouts" in the left sidebar. This will display a list of available page layouts for the selected object.
3. Select the Consultant Layout page layout



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



5. Click on Save

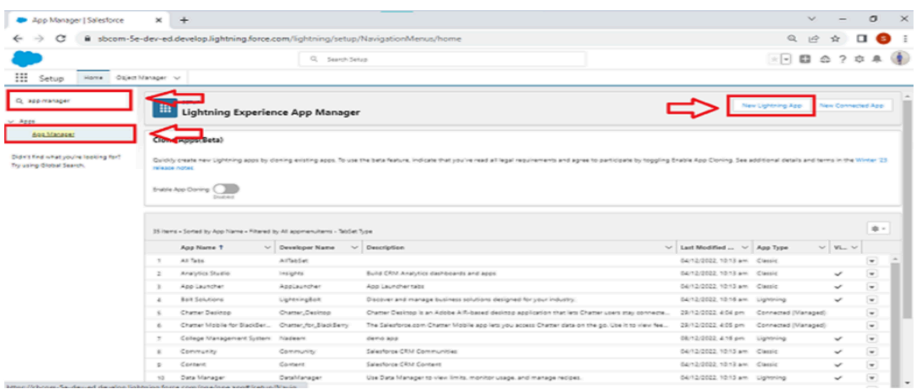


5.The Lightning App

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

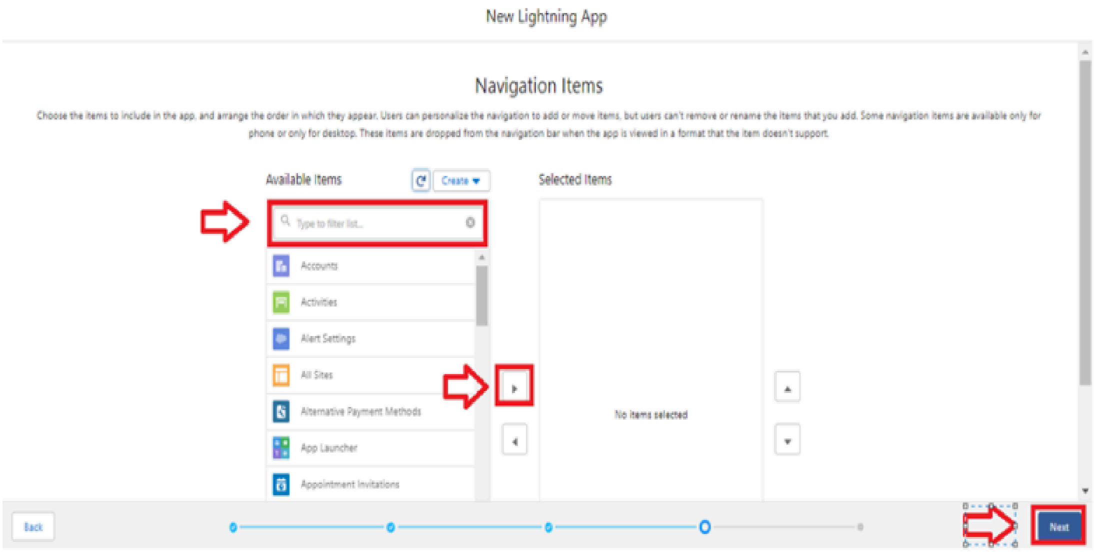
To create a Lightning app page:
1. Go to the Setup page.
2. In the Quick Find search bar, type “App Manager” and select “App Manager.”
3. Click on New Lightning App.
    - ■ Fill the app name as Urban Color in App Details and Branding.
    - ■ Click Next.
    - ■ On the App Options page, keep the settings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



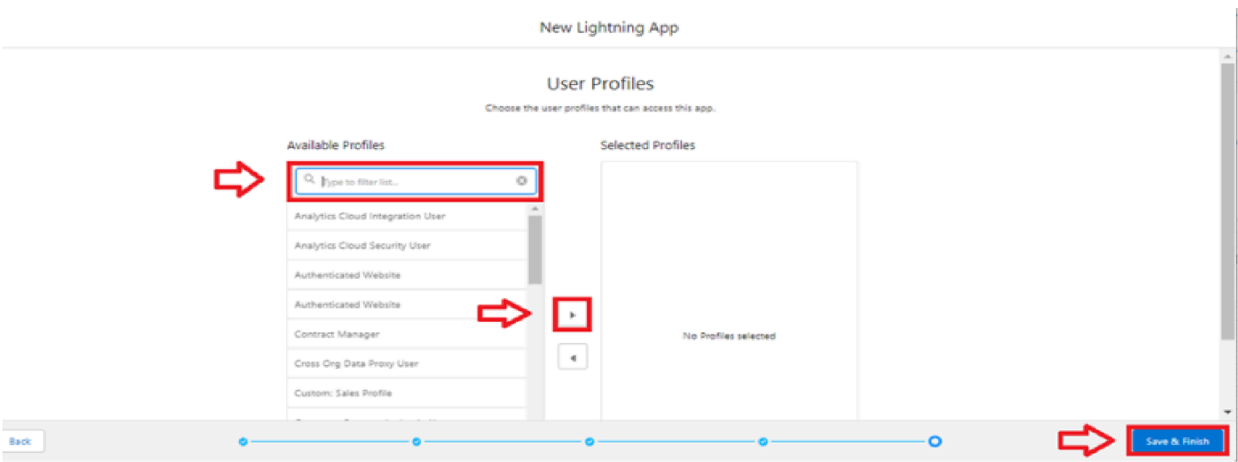
■ Click Next

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

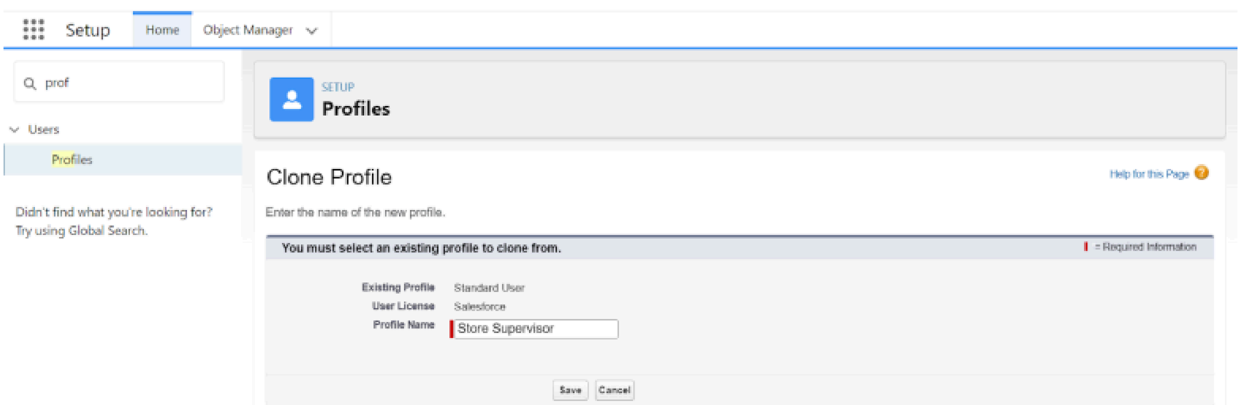


6.Profile

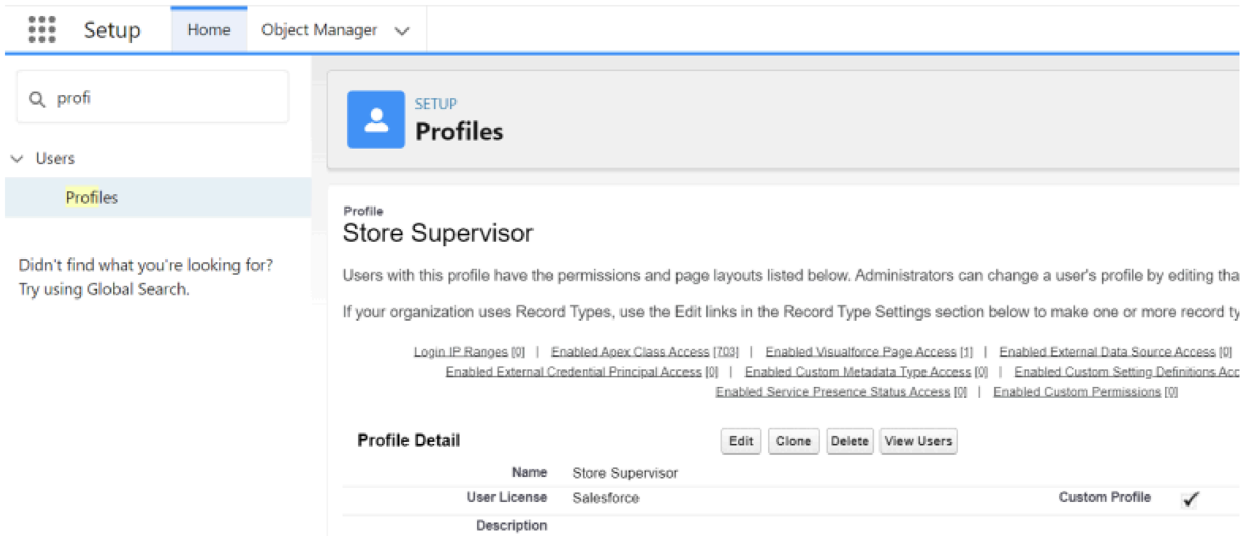
A profile is a group/collection of settings and permissions that define what a user can do in salesforce. A profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login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

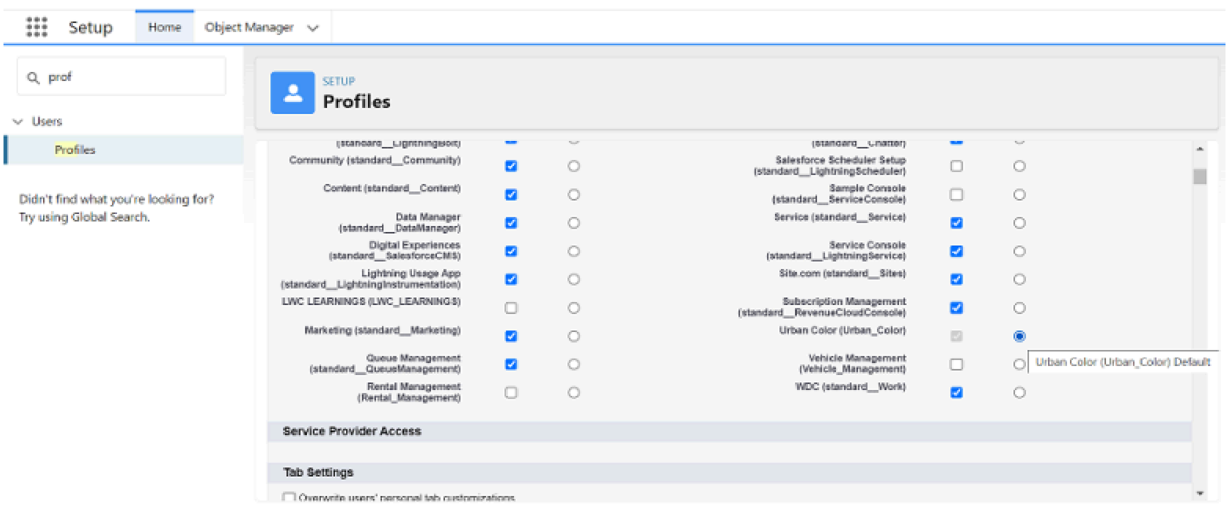
6.1.Creating a Profile

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.



6. While still on the Store Supervisor profile page, click Edit.
7. Scroll down to Custom Object Permissions and give access for Create, Read, Edit, Delete, View All, and Modify All for the Our Customers, Consultants, Retailers, Others objects

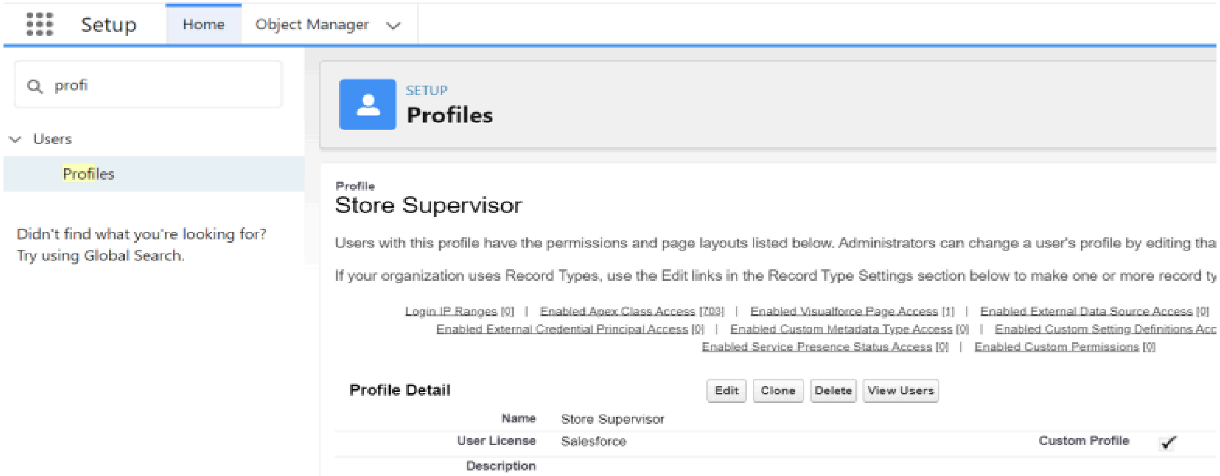




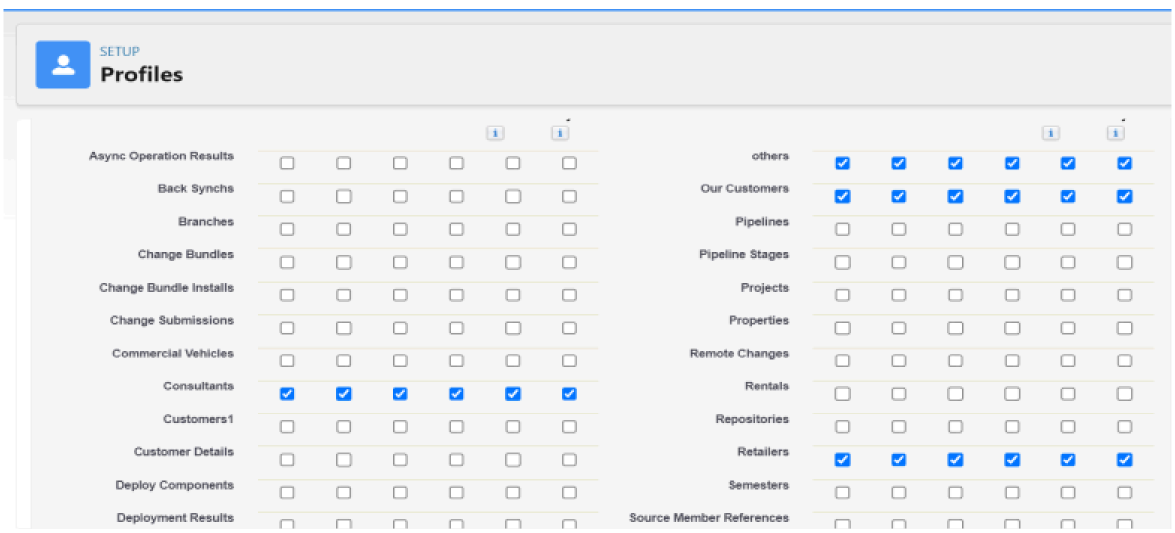
8. Scroll down to Custom App Settings and give access to Urban Color.
9. Click on Save.

To Create a New Profile:

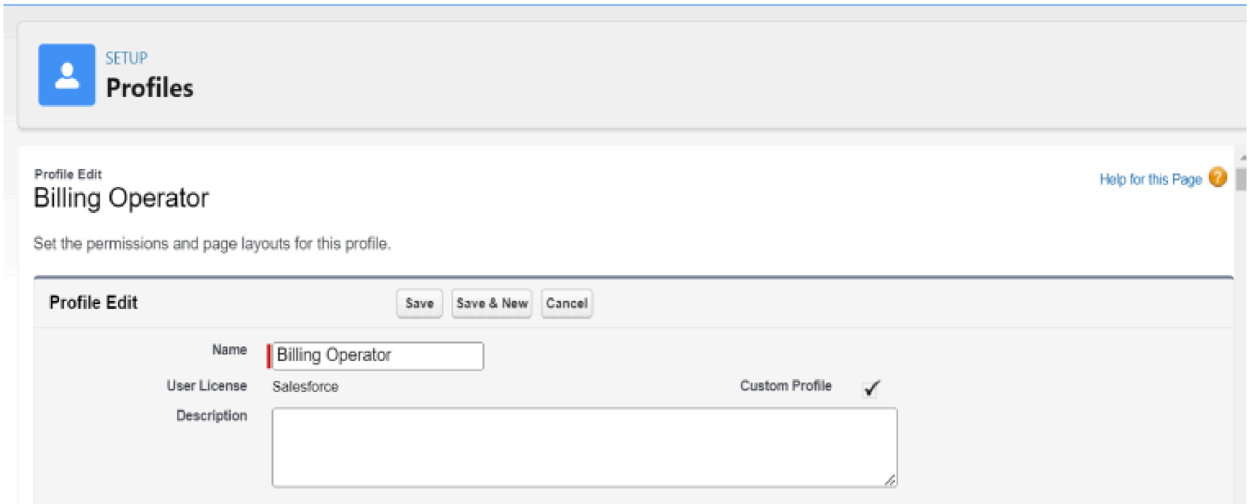
1. Go to Setup.
2. Type Profiles in the Quick Find box.
3. Click on Profiles.
4. Clone the desired profile (Standard User is preferable).
5. Enter the Profile Name.
6. Click Save.
7. While still on the profile page, click Edit.

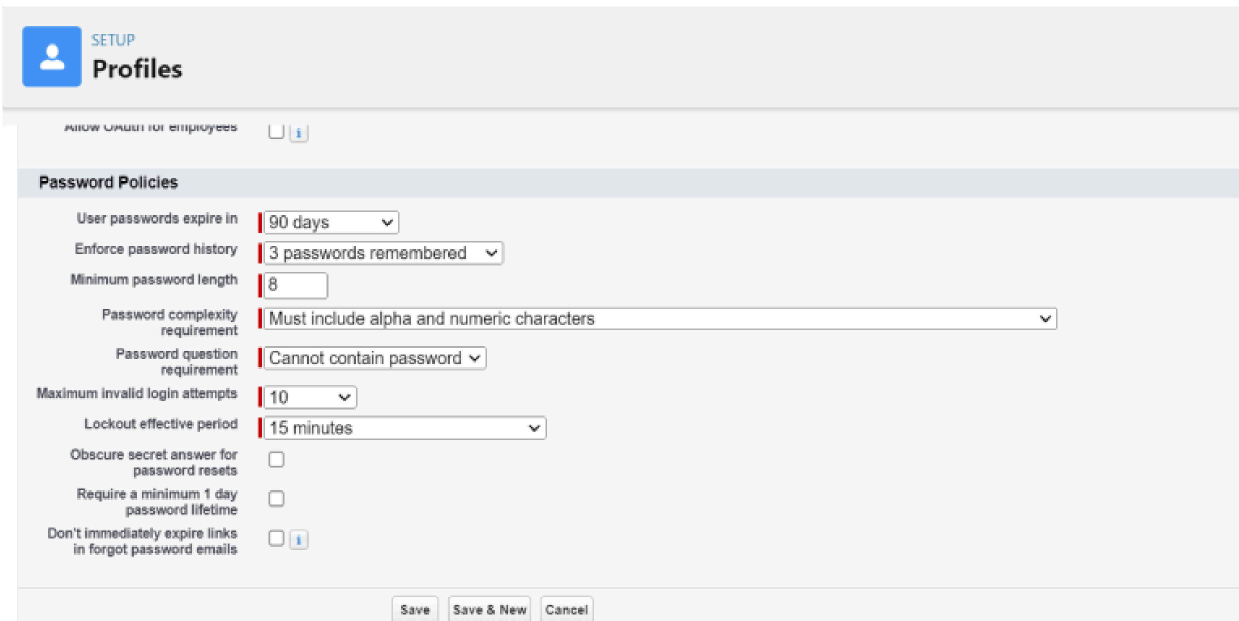


8. Scroll down to the Custom Object Permissions and give all access to the Consultants,Others, Our Customers, Retailers objects.
9. Click on Save



Similarly, Create an Operator Profile:
1. Clone the Salesforce Platform user profile.
2. Give access only for Billing Operator
3. Click on save


SETUP
Profiles
Profile Edit
Billing Operator
Help for this Page
Set the permissions and page layouts for this profile.
Profile Edit
Save
Save & New
Cancel
Name
Billing Operator
User License
Salesforce
Custom Profile
Description


SETUP
Profiles
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
Save
Save & New
Cancel

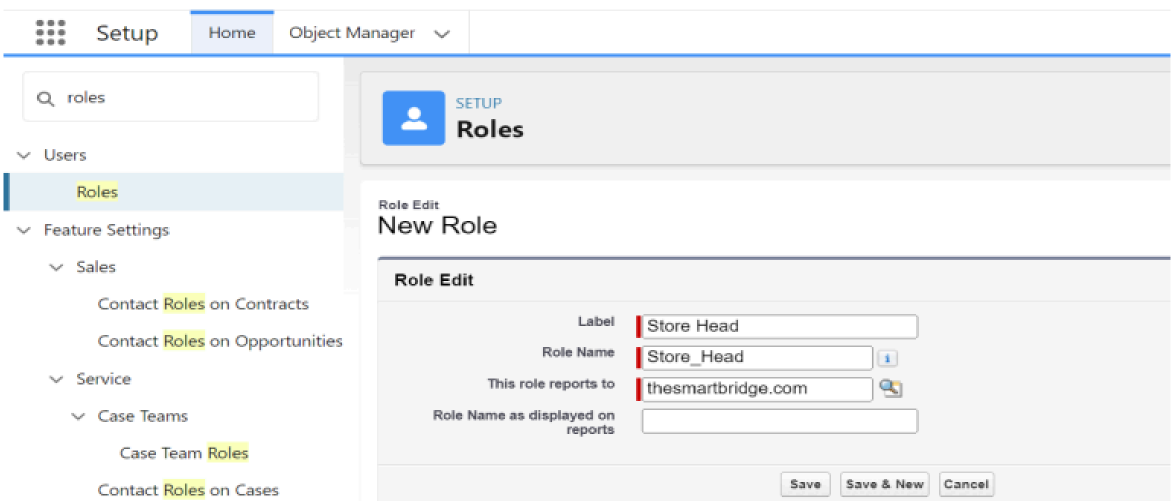
7.Setup Roles

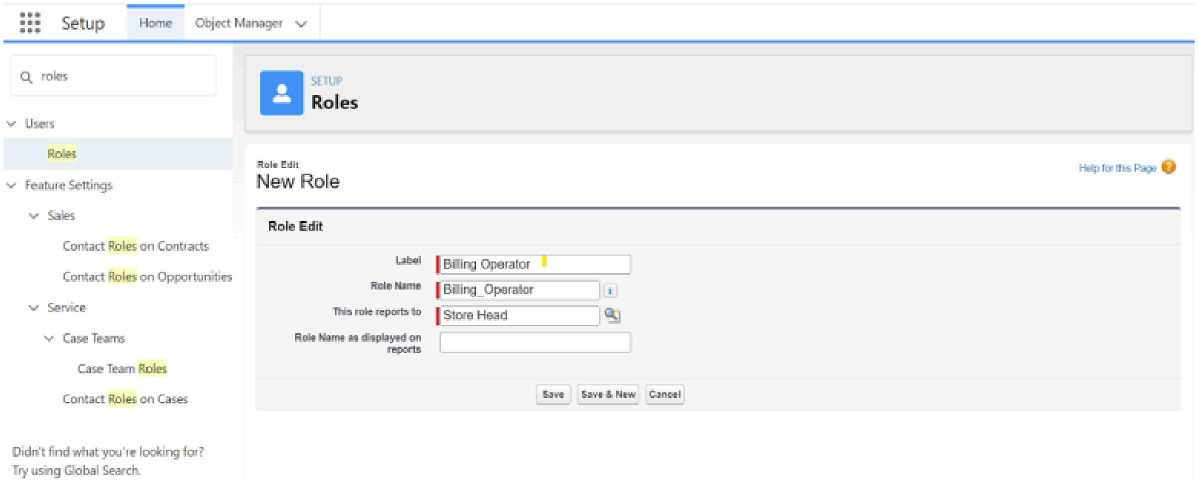
Roles are record-level access controls that define what data a user can see in Salesforce.

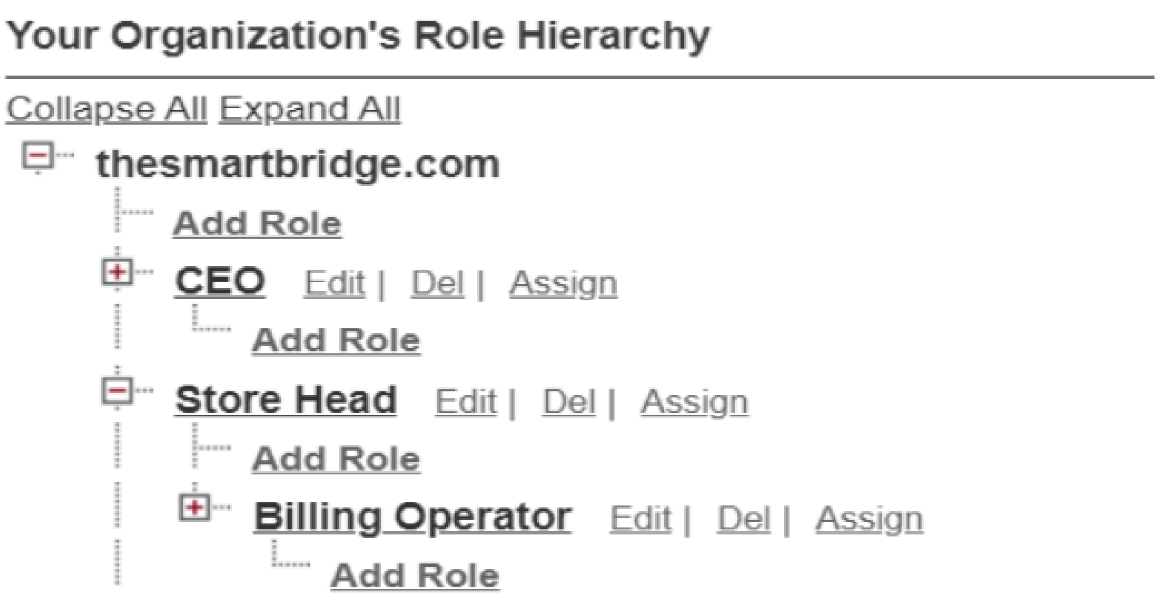
Setup Roles

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




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
Role Edit
New Role
Help for this Page
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

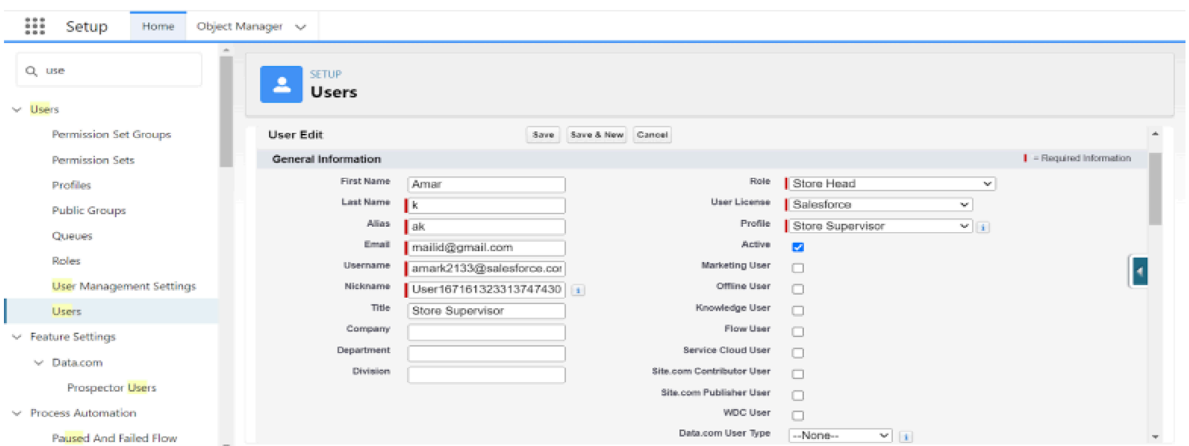

Your Organization's Role Hierarchy
Collapse All Expand All
thesmartbridge.com
Add Role
CEO Edit | Del | Assign
Add Role
Store Head Edit | Del | Assign
Add Role
Billing Operator Edit | Del | Assign
Add Role

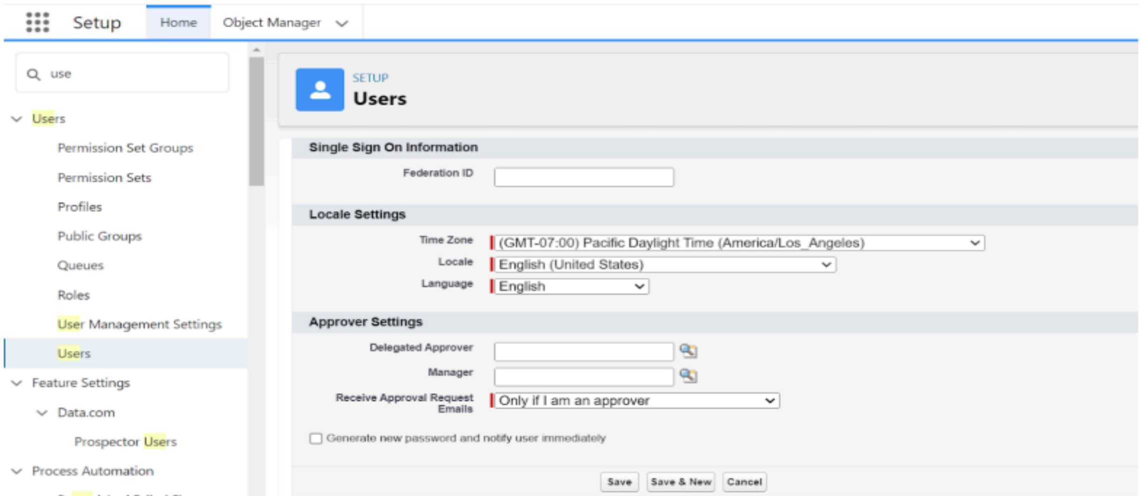
8.Users

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:

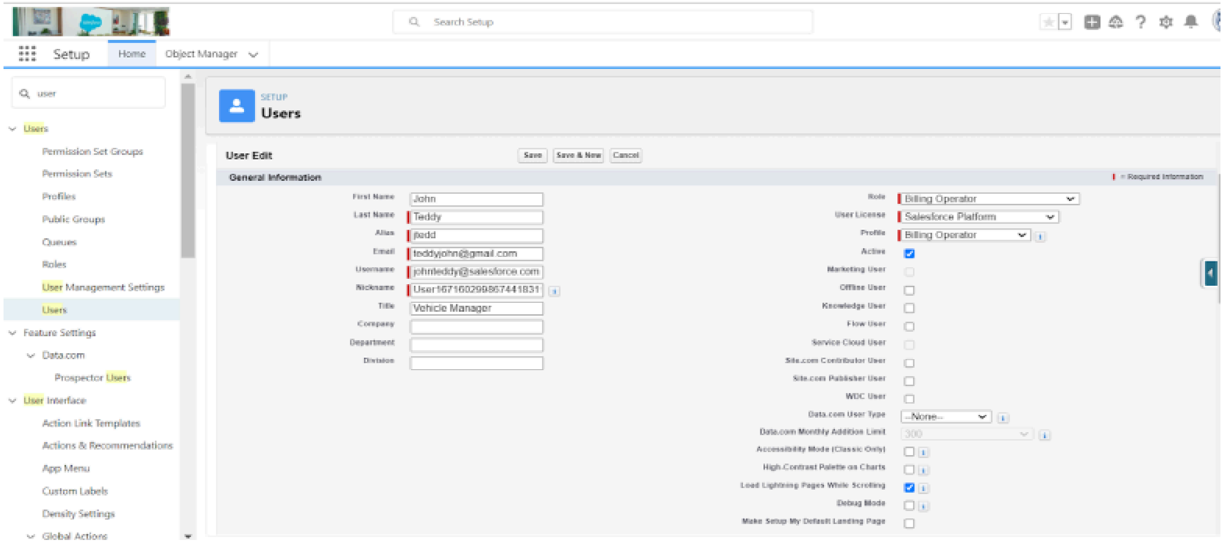
1. From Setup, in the Quick Find box, enter Users, and then select Users.
2. Click New User.
3. Enter the user's name as Amar K and your email address, and create a unique username in the form of an email address. By default, the username is the same as the email address.
4. Select a Role as Store Head.
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

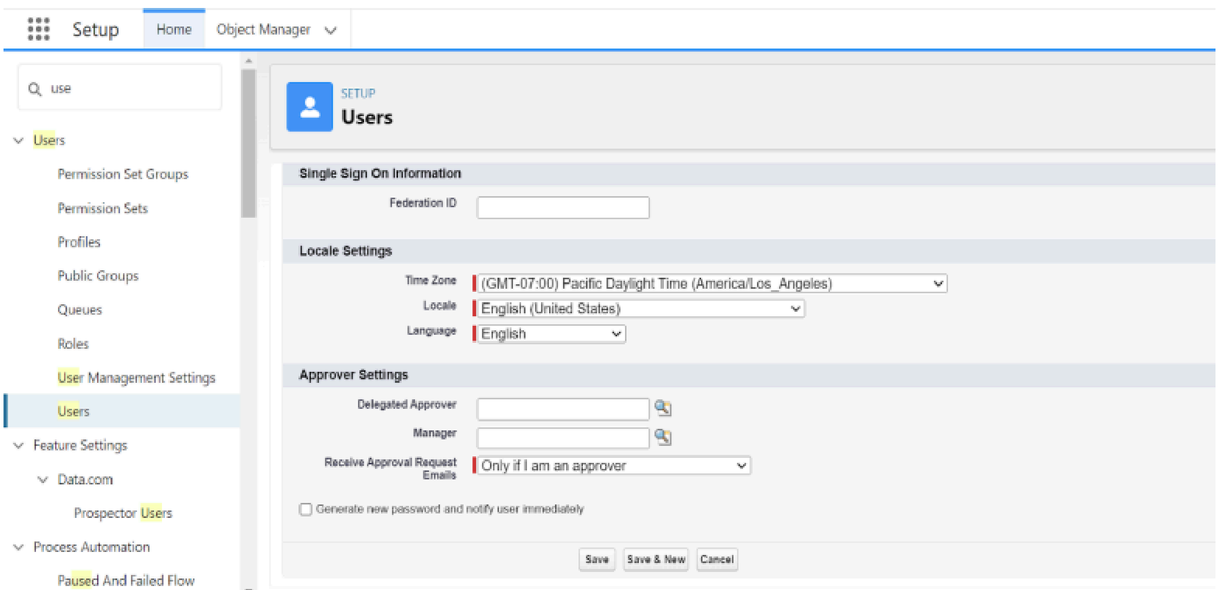




Second User Creation:

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
SETUP
Users
User Edit
Save
Save & New
Cancel
General Information
First Name
John
Last Name
Teddy
Alias
jtedd
Email
teddyjohn@gmail.com
Username
johnteddy@salesforce.com
Title
Vehicle Manager
Role
Billing Operator
User License
Salesforce Platform
Profile
Billing Operator
Active

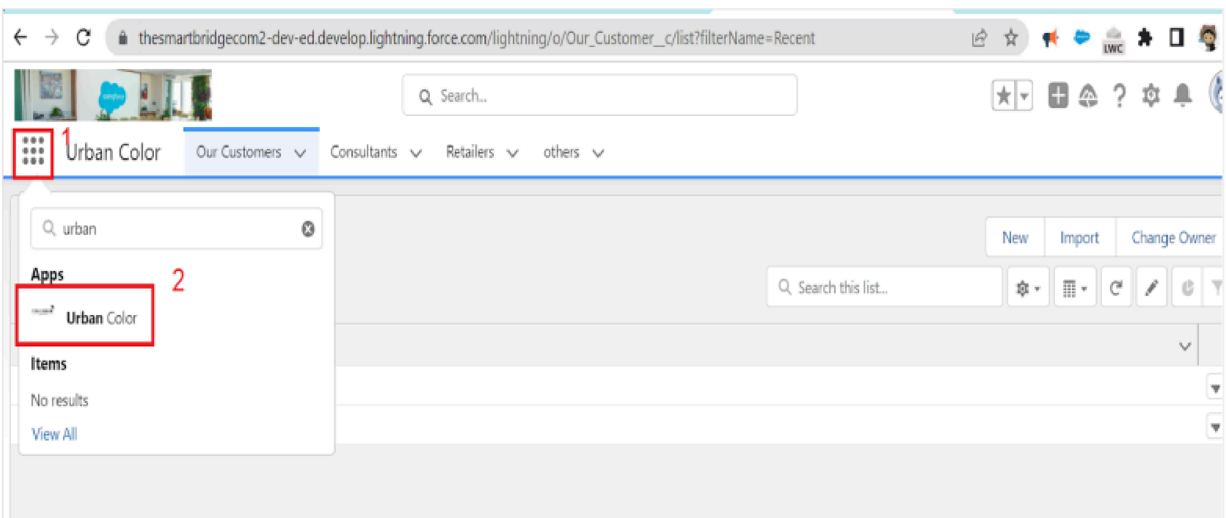

Setup
Home
Object Manager
SETUP
Users
Single Sign On Information
Federation ID
Locale Settings
Time Zone
(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)
Locale
English (United States)
Language
English
Approver Settings
Delegated Approver
Manager
Receive Approval Request Emails
Only if I am an approver
Generate new password and notify user immediately
Save
Save & New
Cancel
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Feature Settings
Data.com
Prospector Users
Process Automation
Paused And Failed Flow

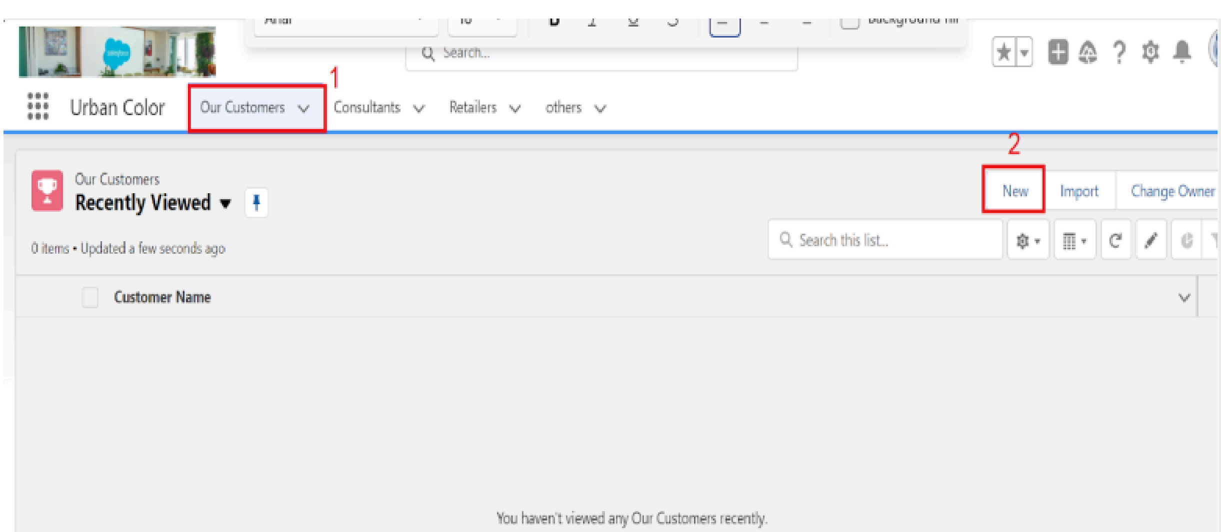
9.User Adoption

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

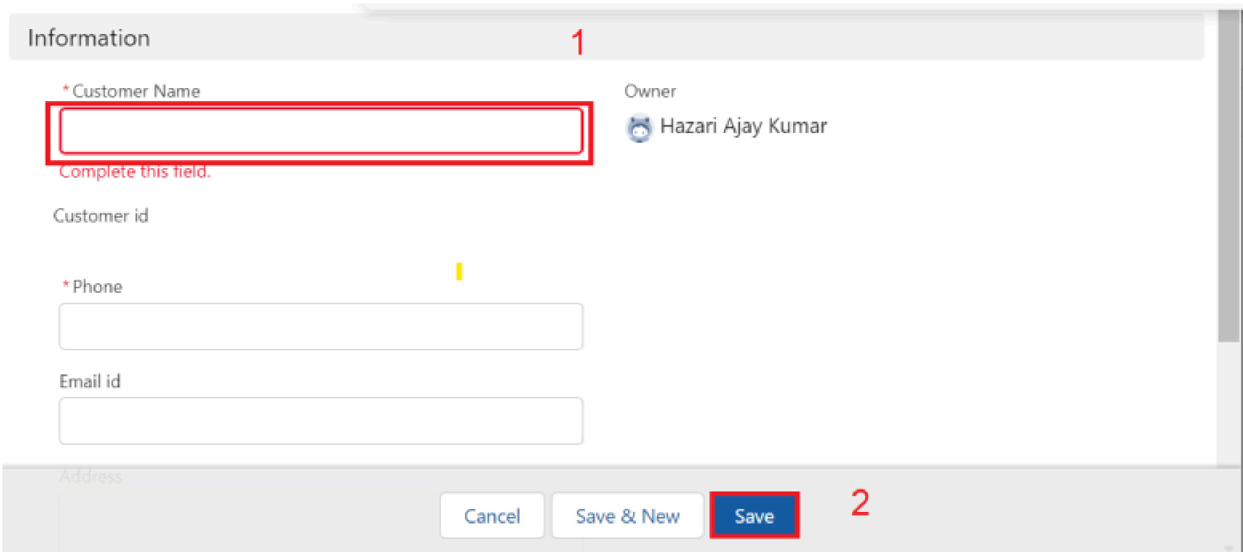
1. Click on the App Launcher on the left side of the screen.
2. Search for Urban Color and click on it.
3. Click on the Our Customer tab.
4. Click the New button.
5. Fill in all the Our Customer record details.
6. Click on the Save button.

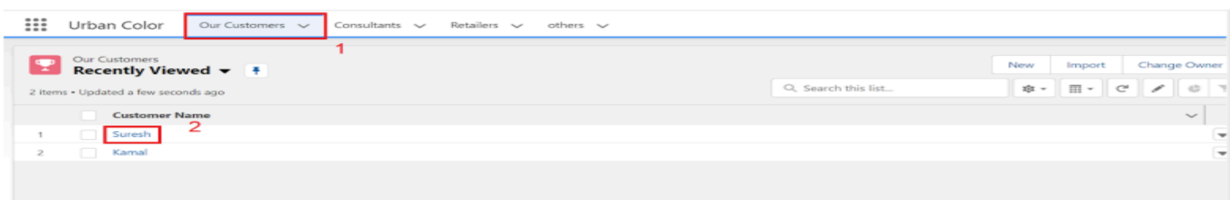


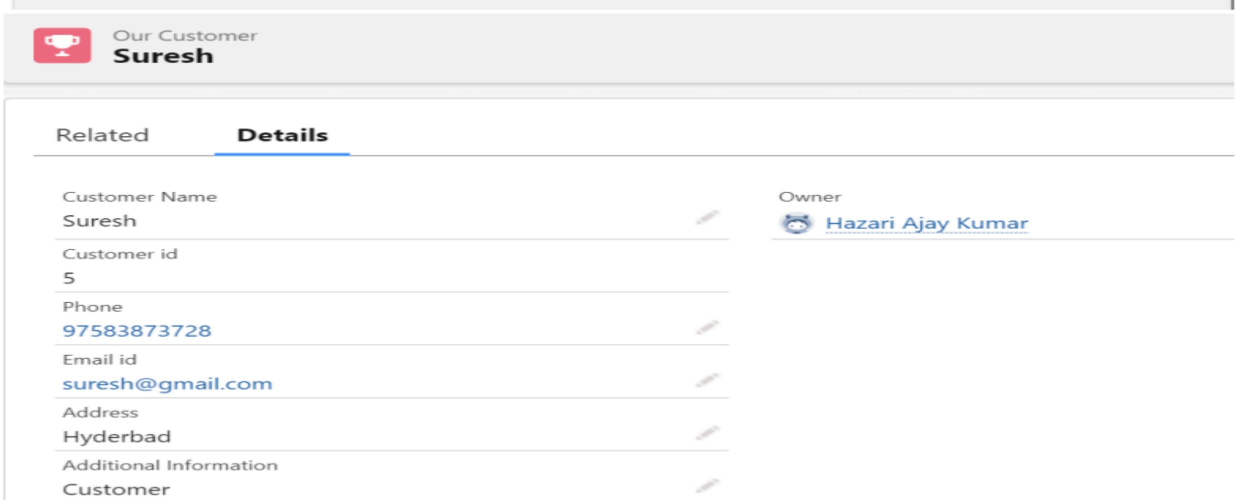


View Record (Our Customer)

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



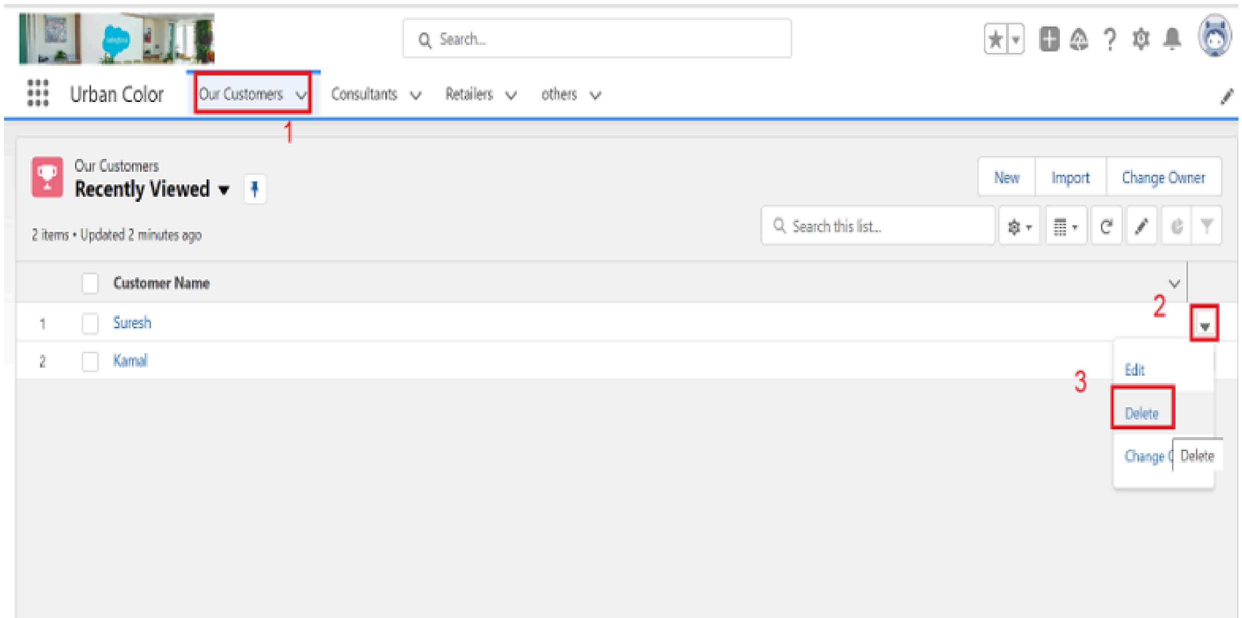


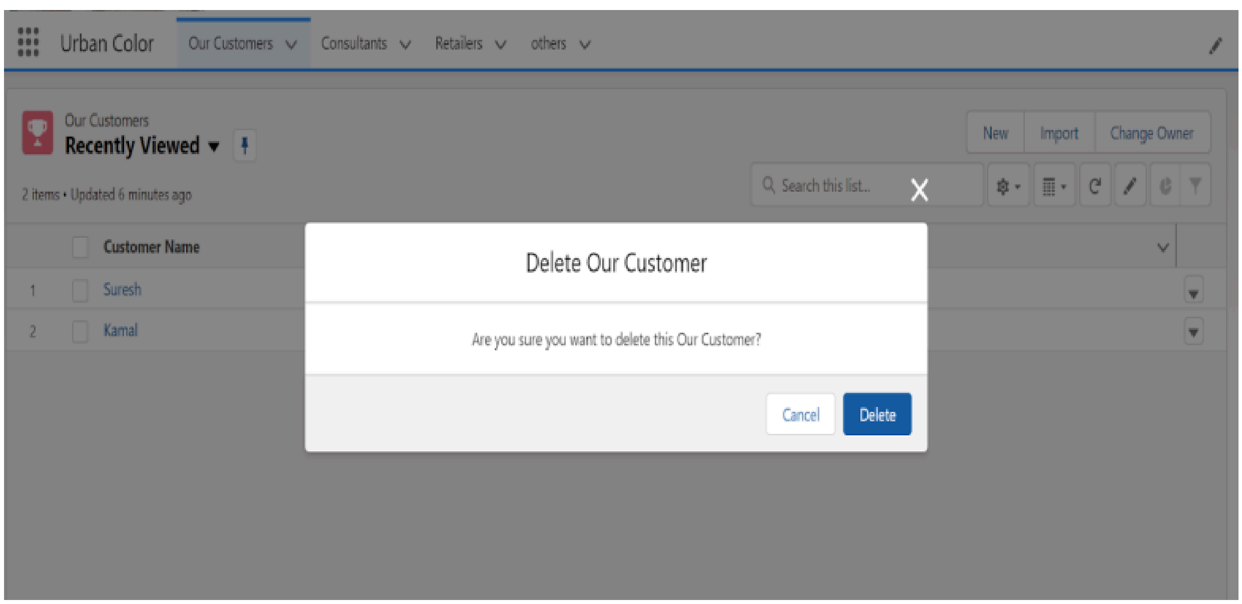


Delete Record (Our Customer)

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.



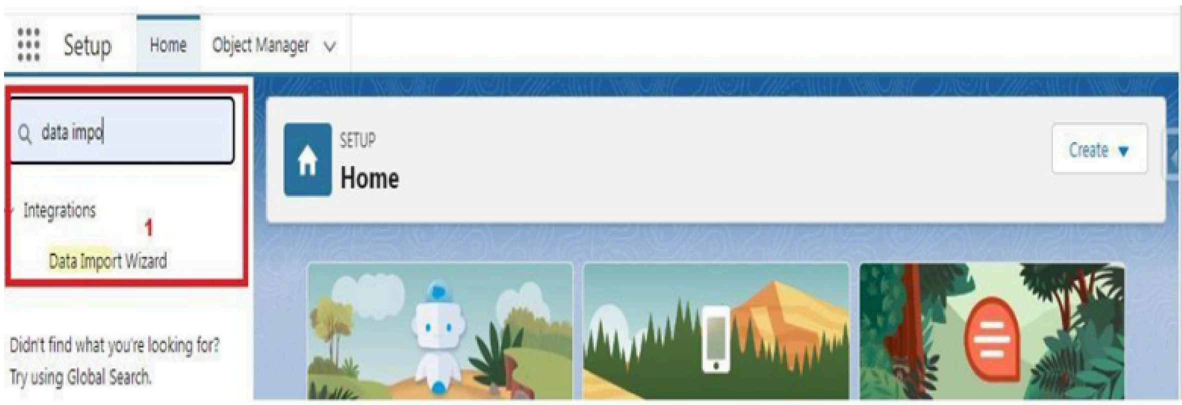


10. Import Data

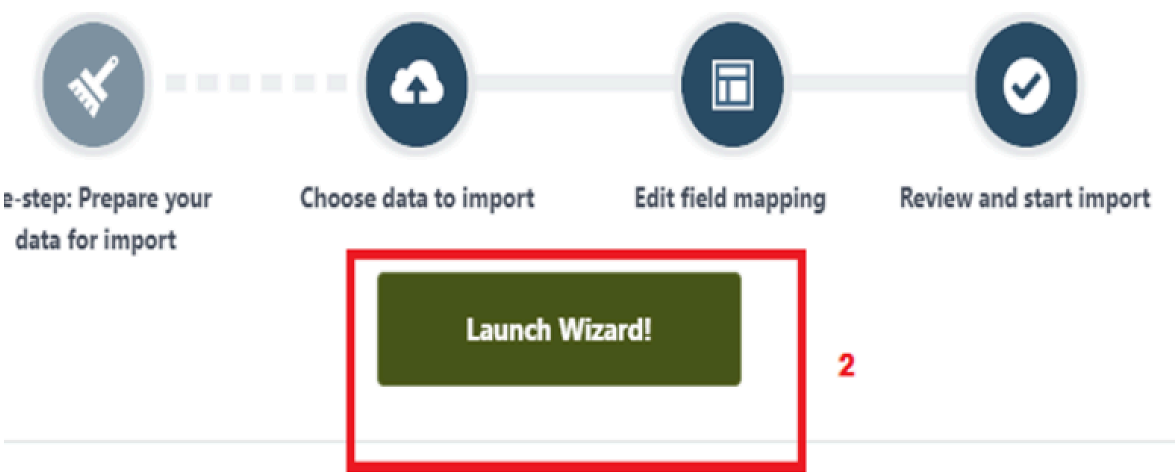
Data Import Wizard—This tool, accessible through the Setup menu, allows you to import data into common standard objects such as Contacts, Leads, Accounts, as well as data into custom objects.

To Import Data

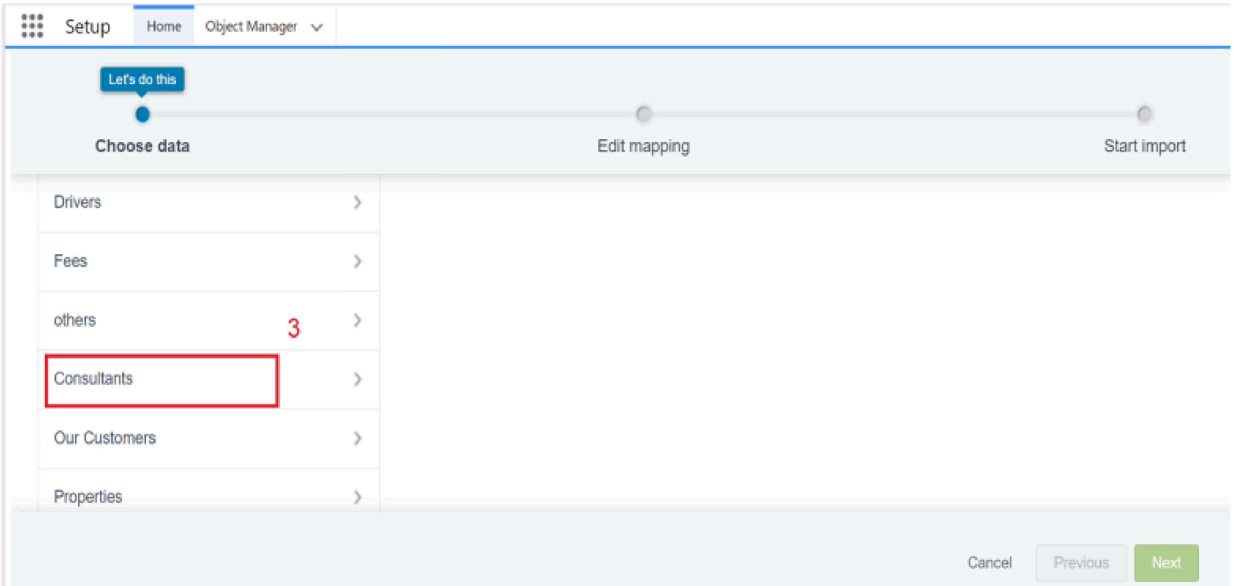
1. From Setup, click the Home tab.
2. In the Quick Find box, enter Data Import and select Data Import Wizard.



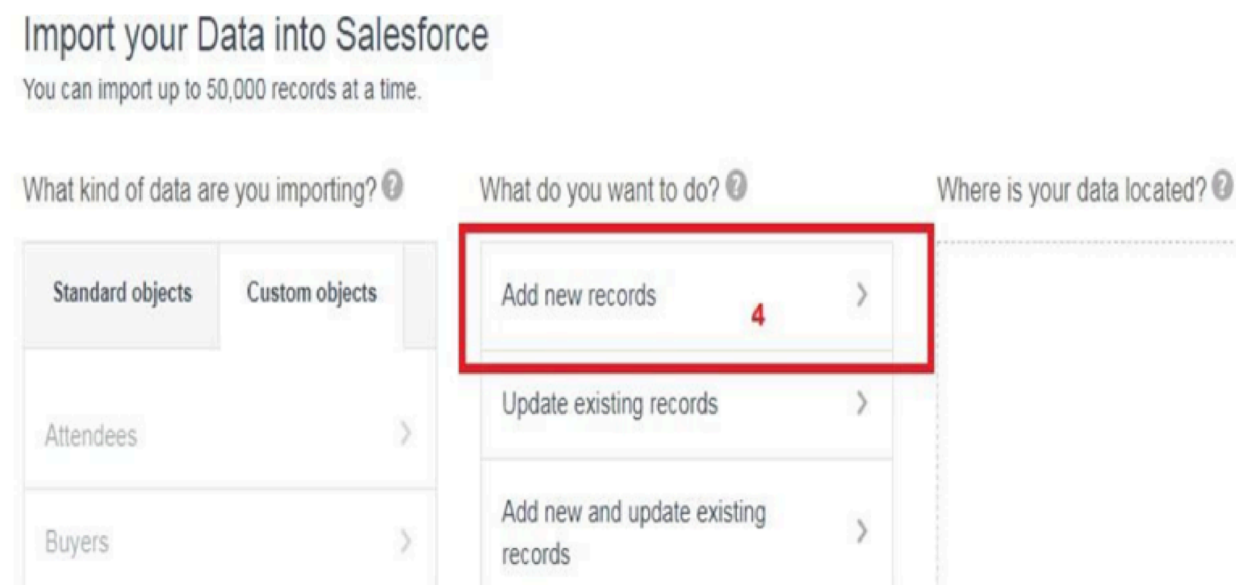
3. Click **Launch Wizard!**

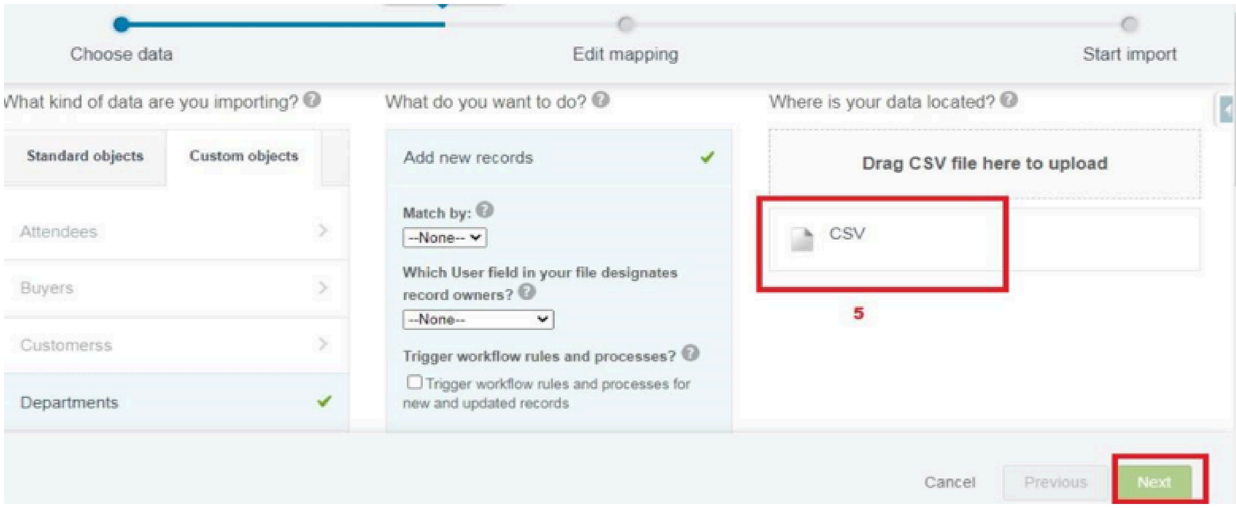


4. Click the Custom Objects tab and select the Consultant object

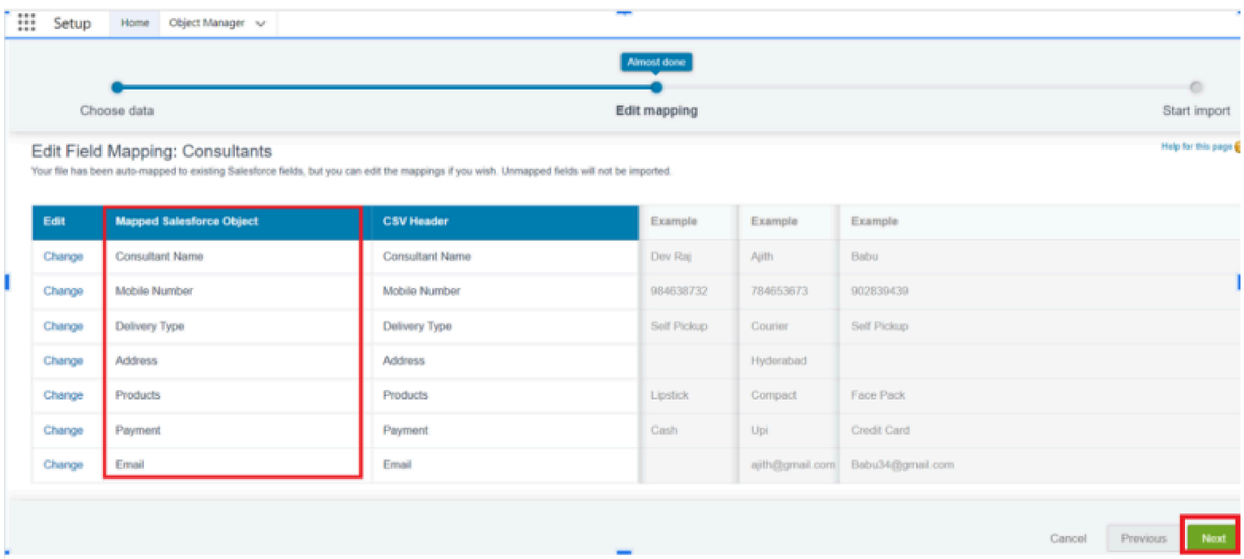


5. Select Add New Records.
6. Click CSV and choose the file Consultant_CSV which was created earlier. Click Next

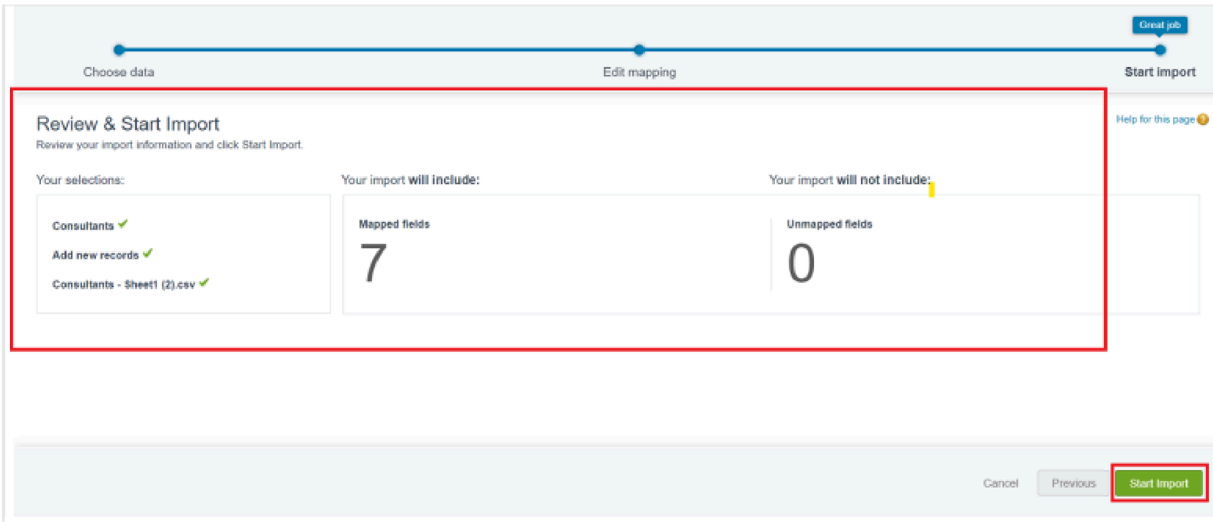




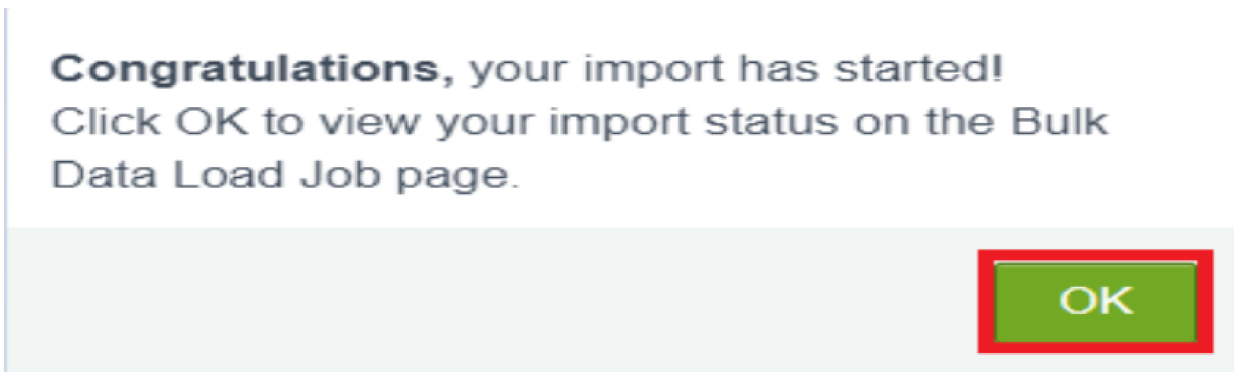
7. Since the field names in the CSV file (CSV Header) are the same as the field names in your object (Mapped Salesforce Object), the fields are automatically mapped. Click Next.



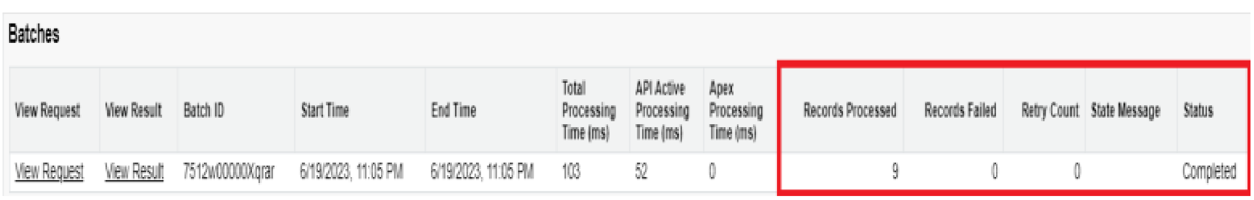
8. The next screen gives you a summary of your data import. Click Start Import



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.

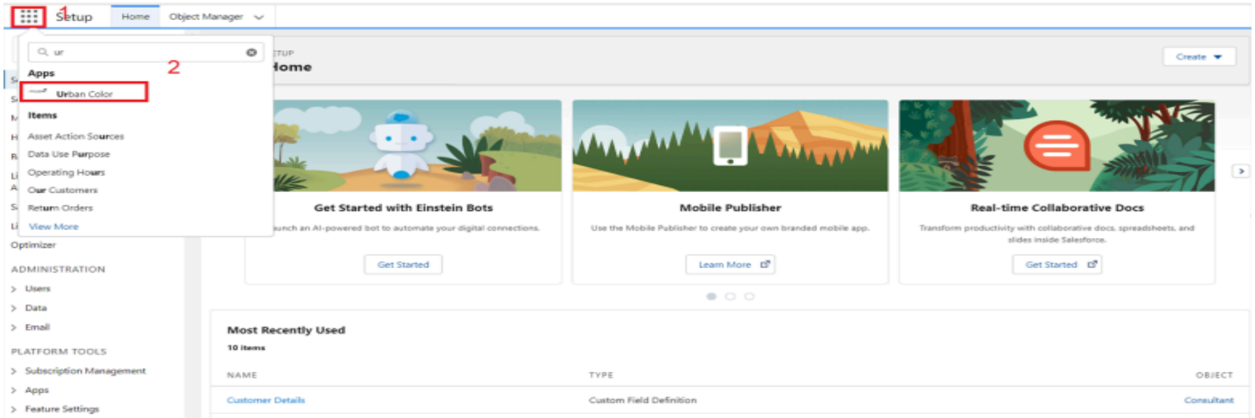
3. Manager:

■ Users can do everything Viewers and Editors can do, plus control other users' access levels to the folder.

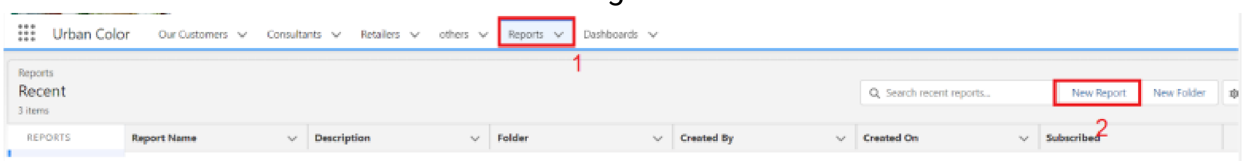
■ Managers can also delete the report.

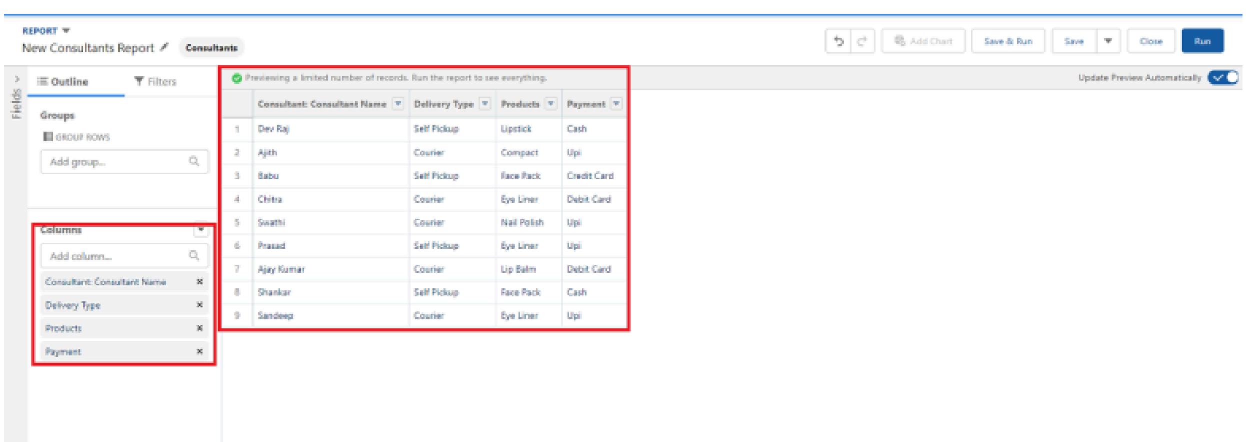
11.1.Create Report

1. Click App Launcher.
2. Select Urban Color App.
3. Click the Reports tab

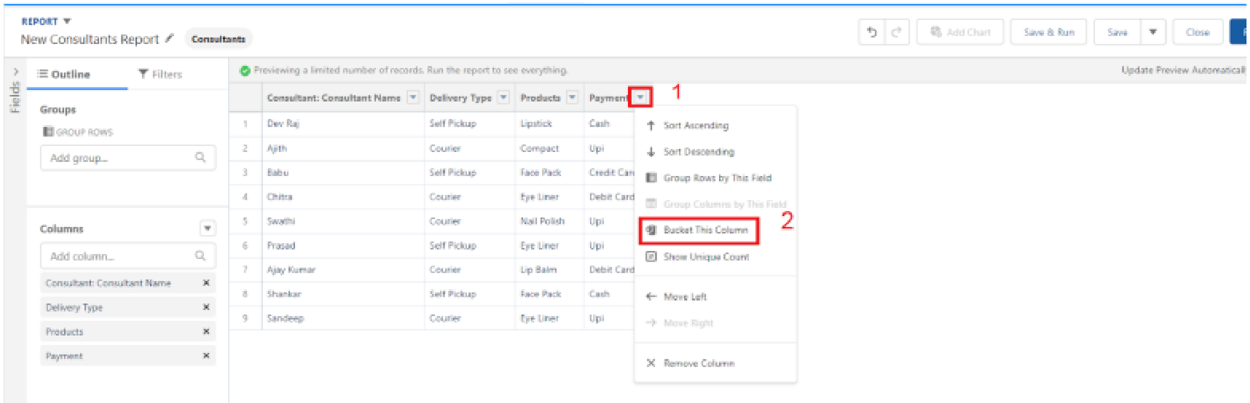


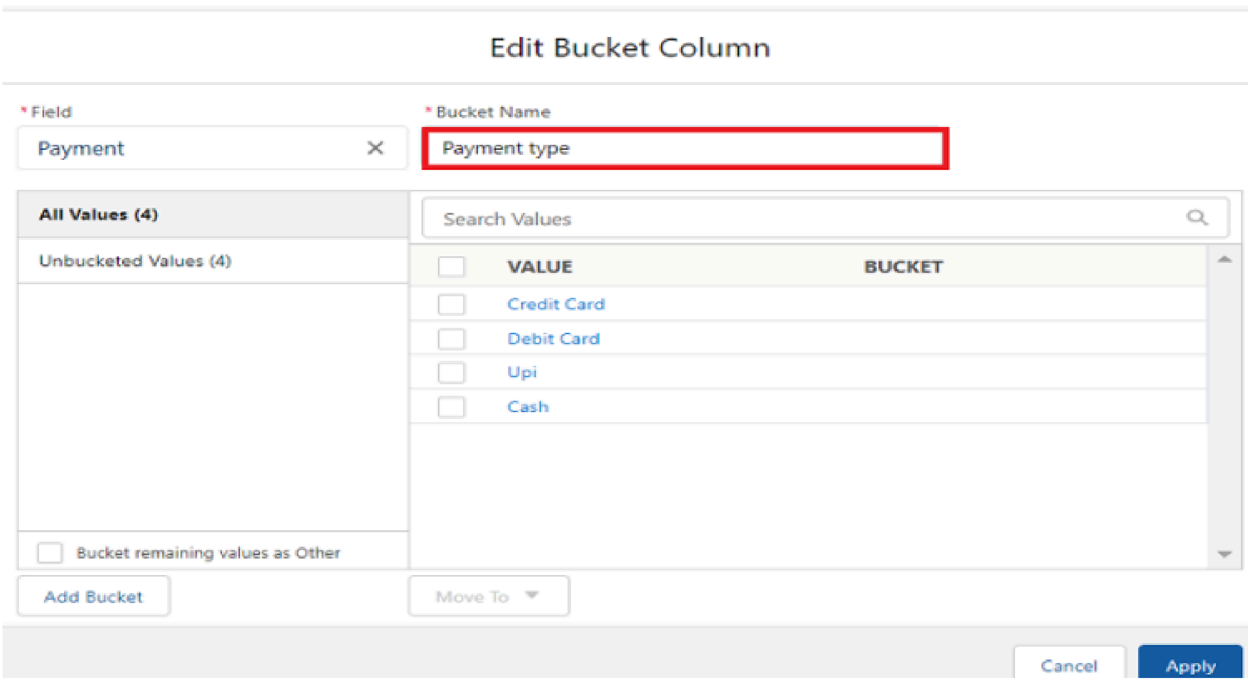
4. Click New Report.
5. Select the report type as Consultants and click Start Report.
6. Customize your report by selecting the following columns: Consultant Name, Delivery Type, Products, Payment.
7. Click the drop-down option on the Payment column and select Bucket This Column
8. Name the bucket Payment Type.
9. Click Add Bucket and name it NetBanking. 10.Click Add Bucket and name it Cash.

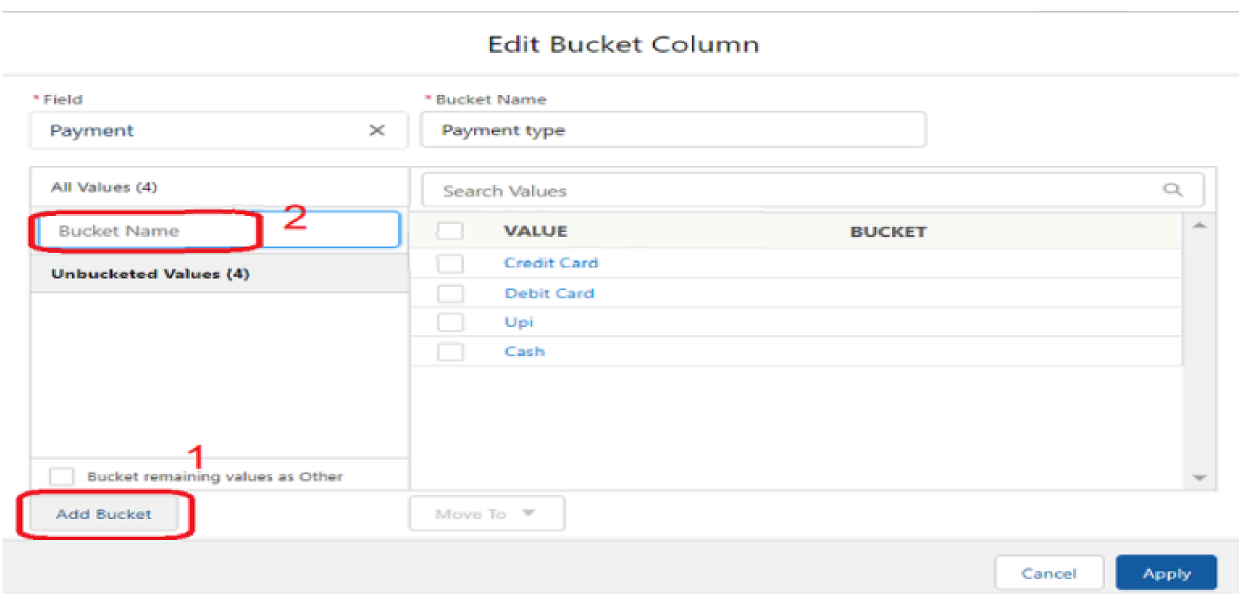




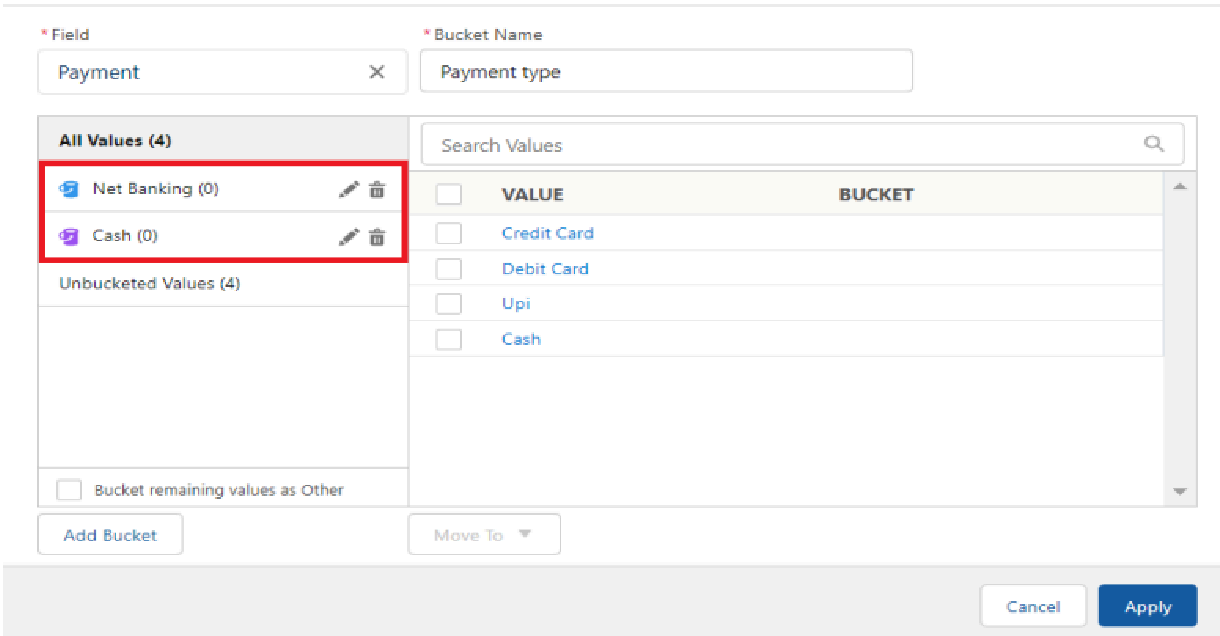
	Consultant: Consultant Name	Delivery Type	Products	Payment
1	Dev Raj	Self Pickup	Lipstick	Cash
2	Ajith	Courier	Compact	Upi
3	Babu	Self Pickup	Face Pack	Credit Card
4	Chitra	Courier	Eye Liner	Debit Card
5	Swathi	Courier	Nail Polish	Upi
6	Prasad	Self Pickup	Eye Liner	Upi
7	Ajay Kumar	Courier	Lip Balm	Debit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

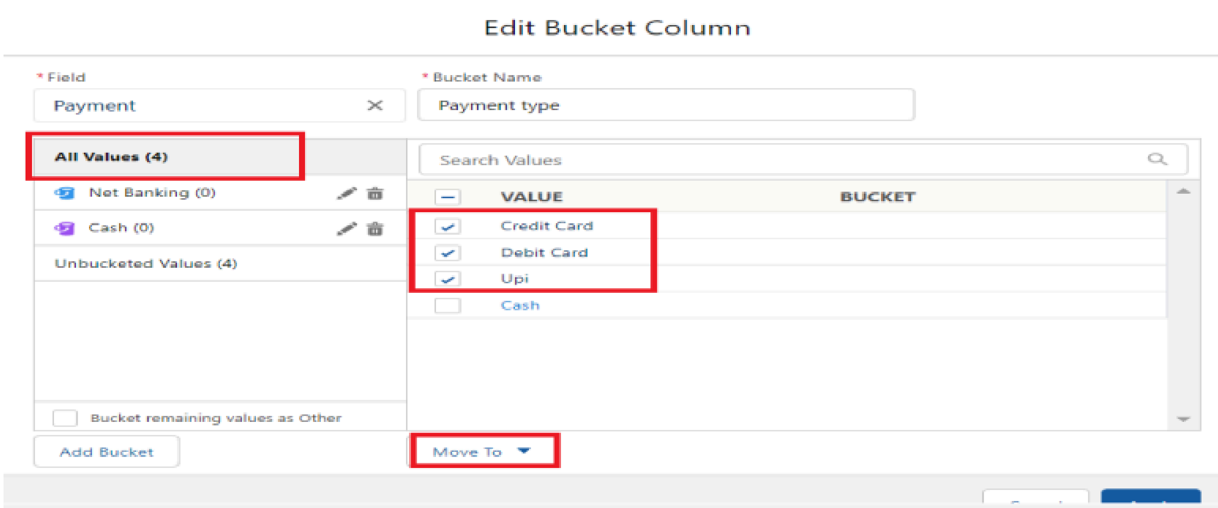

REPORT
New Consultants Report
Consultants
Add Chart
Save & Run
Save
Close
Outline
Filters
Fields
Groups
GROUP ROWS
Add group...
Columns
Add column...
Consultant: Consultant Name
Delivery Type
Products
Payment
Previewing a limited number of records. Run the report to see everything.
Update Preview Automatically
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
Prasad
Self Pickup
Eye Liner
Upi
7
Ajay Kumar
Courier
Lip Balm
Debit Card
8
Shankar
Self Pickup
Face Pack
Cash
9
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
1
2

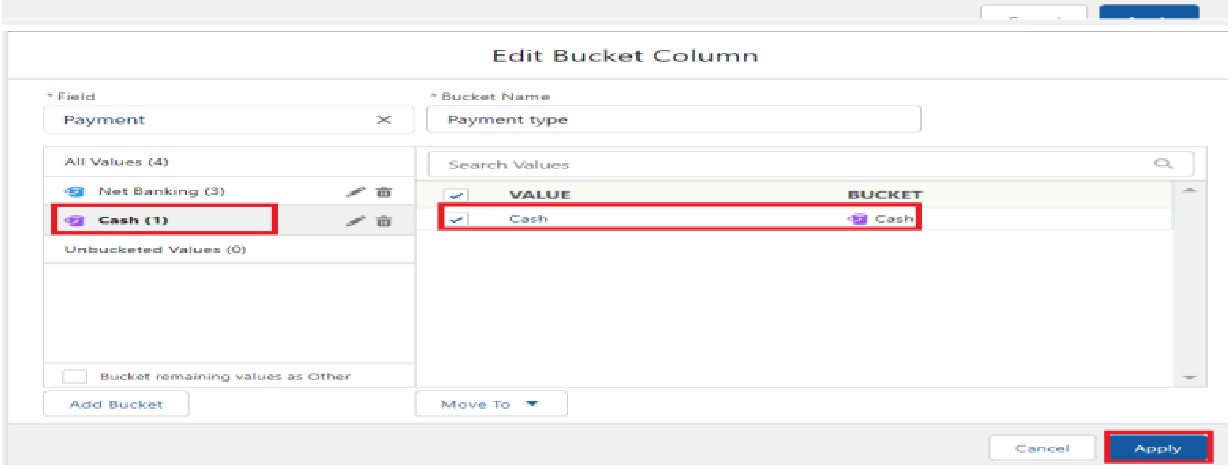

Edit Bucket Column
* Field
Payment
* Bucket Name
Payment type
All Values (4)
Unbucketed Values (4)
Search Values
VALUE
BUCKET
Credit Card
Debit Card
Upi
Cash
Bucket remaining values as Other
Add Bucket
Move To
Cancel
Apply


Edit Bucket Column
* Field
Payment
* Bucket Name
Payment type
All Values (4)
Bucket Name
2
Unbucketed Values (4)
Search Values
VALUE
BUCKET
Credit Card
Debit Card
Upi
Cash
1
Bucket remaining values as Other
Add Bucket
Move To
Cancel
Apply

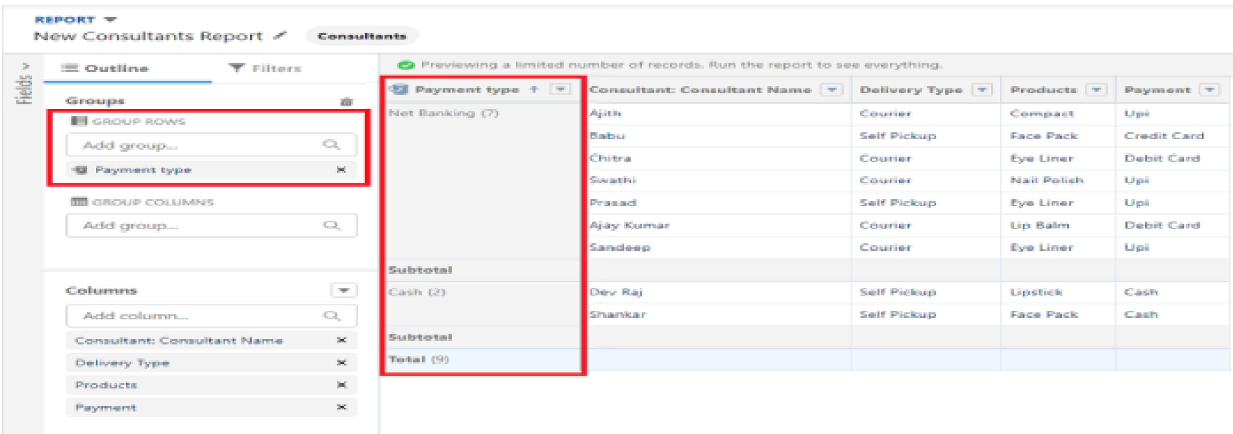
11. Click on All Values, select Credit Card, Debit Card, UPI, and move them to NetBanking.

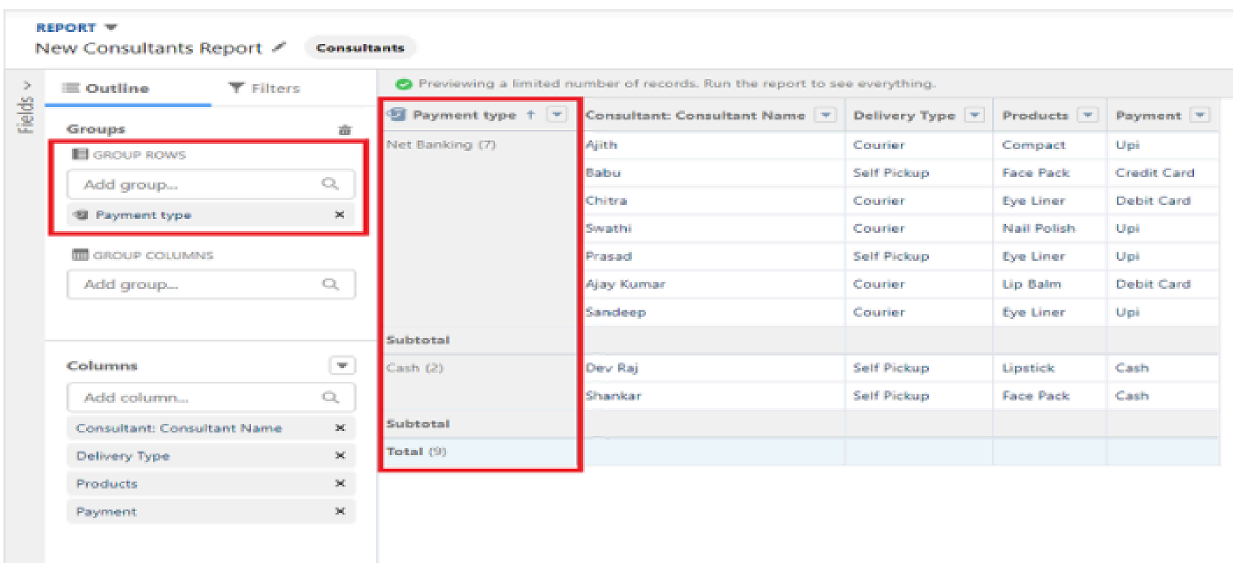




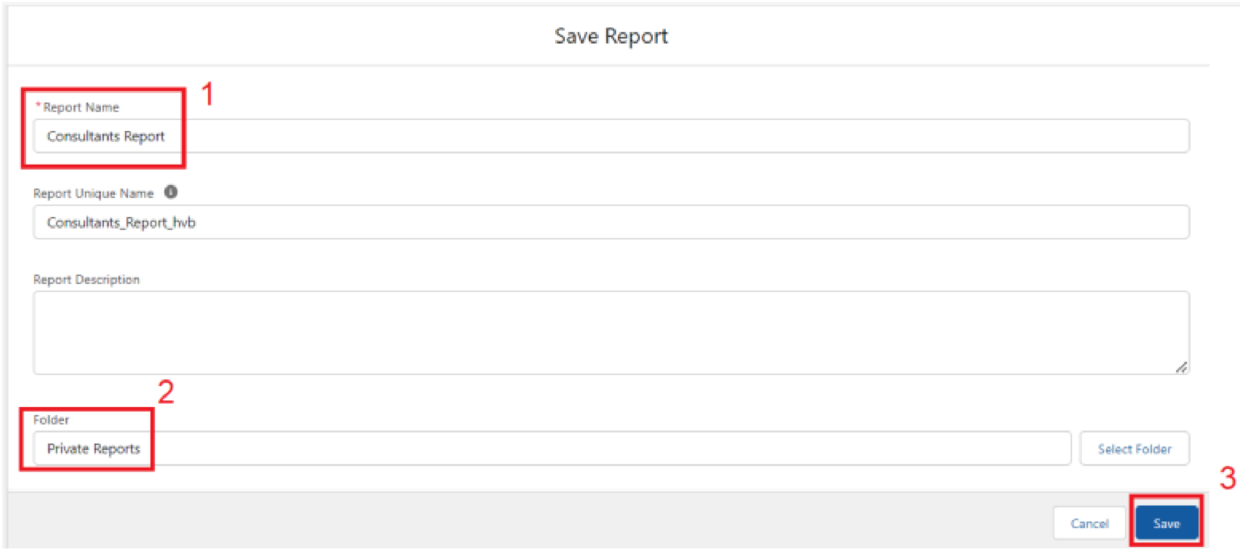


12.Click on All Values again, select Cash, and move it to Cash.
13.Click Apply.
14.In Group Rows, add the Payment Type Bucket field.
15.Click Refresh.
16.Click Save and Run.
17.Give the report a name, e.g., Consultant Report



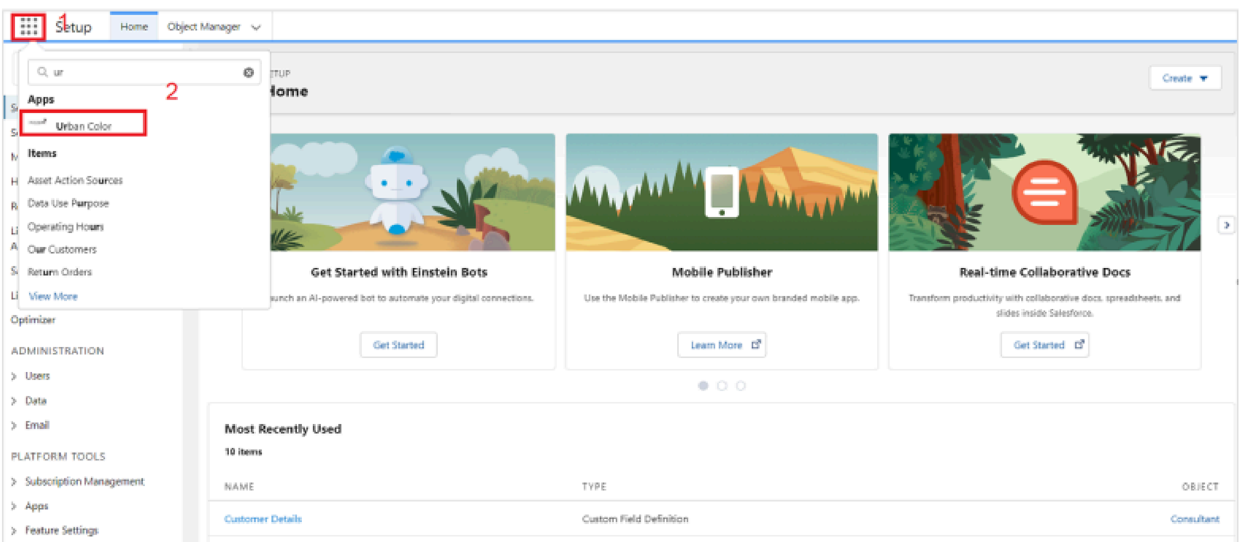


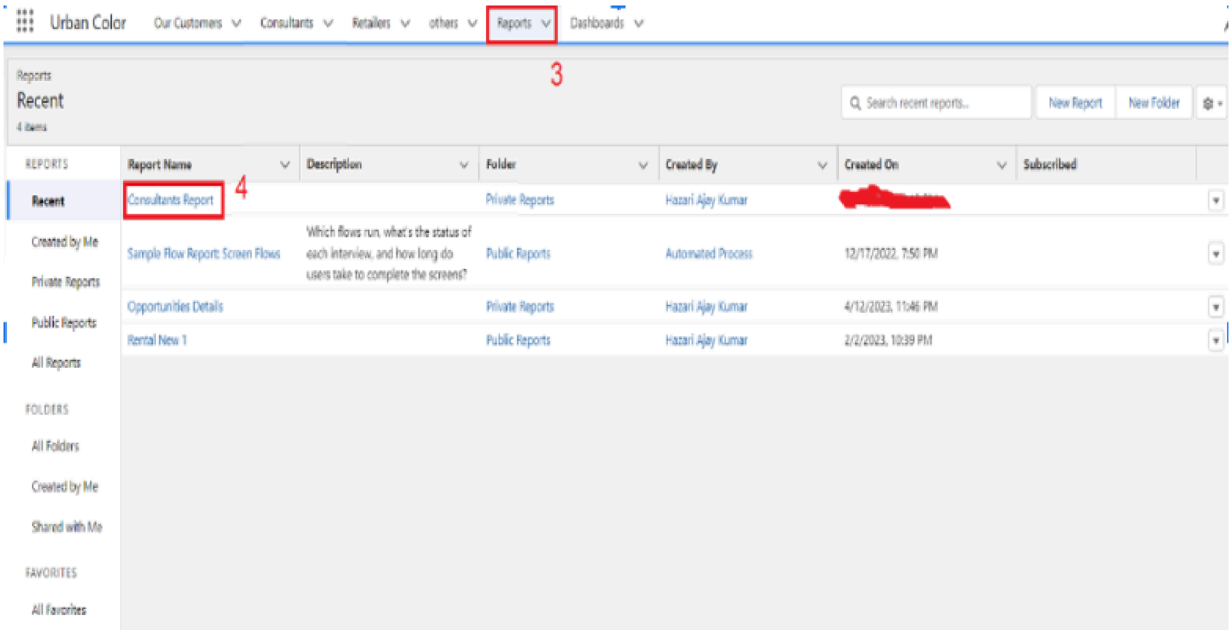
18.Click Save.



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




Urban Color
Our Customers
Consultants
Retailers
others
Reports
Dashboards
3
Reports
Recent
4 items
Search recent reports...
New Report
New Folder
REPORTS
Recent
Created by Me
Private Reports
Public Reports
All Reports
FOLDERS
All Folders
Created by Me
Shared with Me
FAVORITES
All Favorites
Report Name
Description
Folder
Created By
Created On
Subscribed
Consultants Report
4
Private Reports
Hazari Ajay Kumar
Sample Flow Report: Screen Flows
Which flows run, what's the status of each interview, and how long do users take to complete the screens?
Public Reports
Automated Process
12/17/2022, 7:50 PM
Opportunities Details
Private Reports
Hazari Ajay Kumar
4/12/2023, 11:46 PM
Rental New 1
Public Reports
Hazari Ajay Kumar
2/2/2023, 10:39 PM

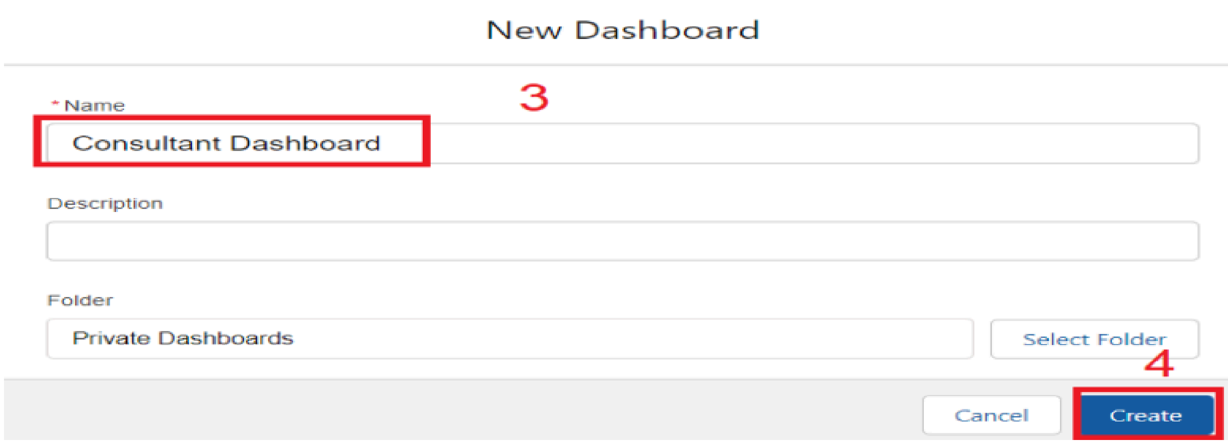
12.Dashboards

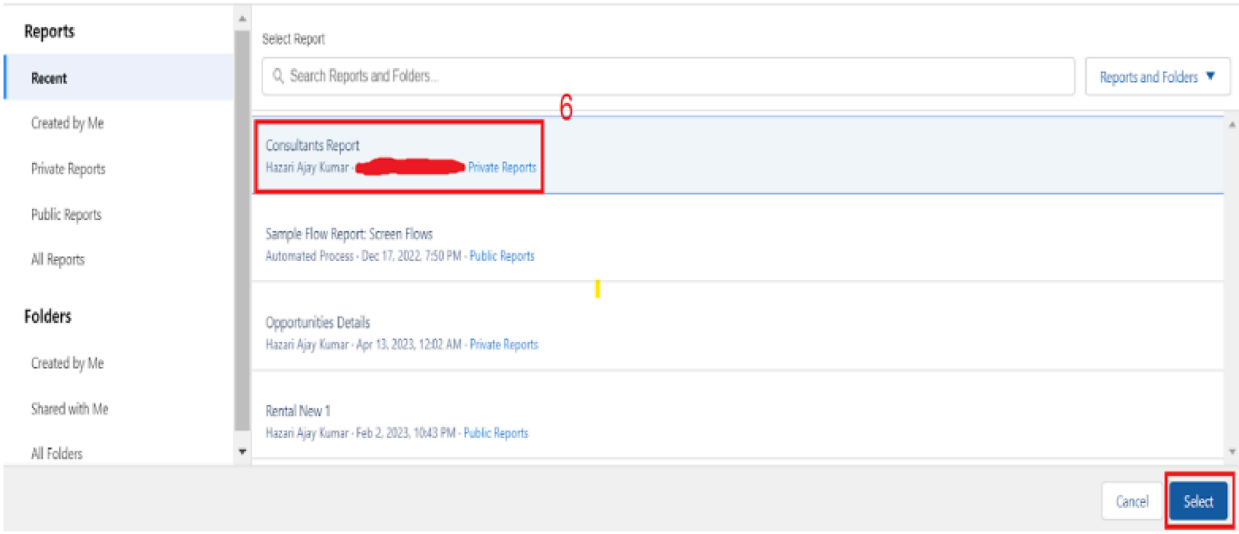
Dashboards let you curate data from reports using charts, tables, and metrics. If your colleagues need more information, then they're able to view your dashboard's data supplying reports. Dashboard filters make it easy for users to apply different data perspectives to a single dashboard.

12.1.Create Dashboard

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

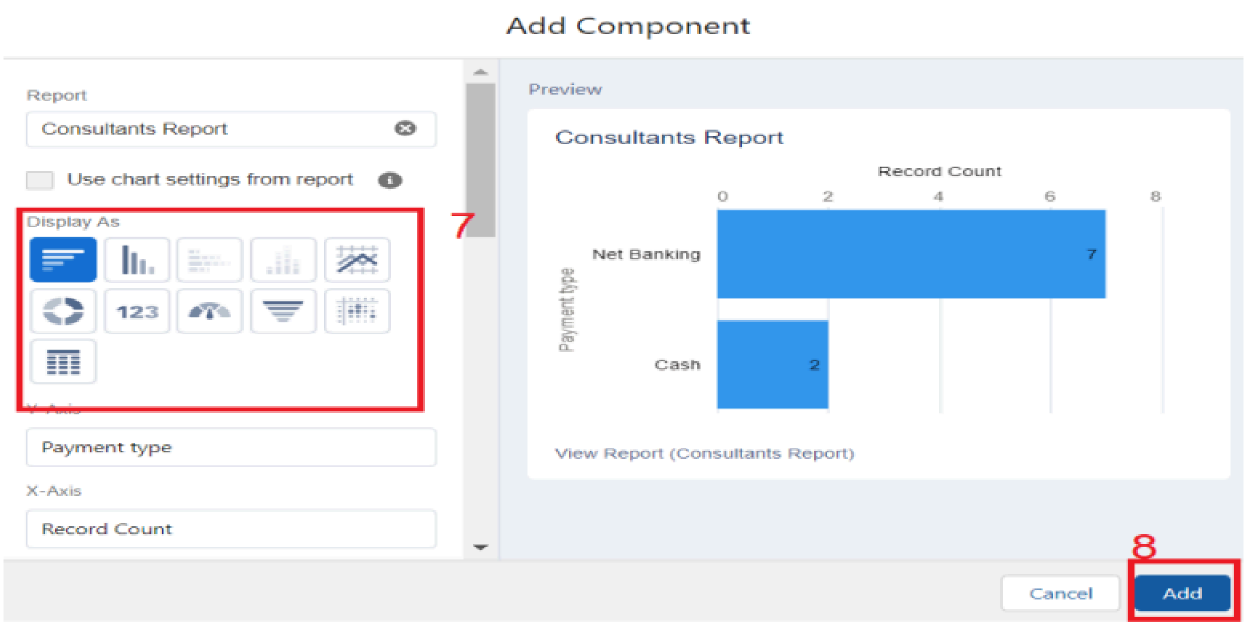
1. open
2. Open the Urban Color Application: Launch the application and navigate to the Dashboards tab.
3. Create a New Dashboard:
   - Click on the "New Dashboard" button.
4. Name Your Dashboard:
   - Enter "Consultant Dashboard" in the name field.
   - Click "Create."
5. Add Components to the Dashboard: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





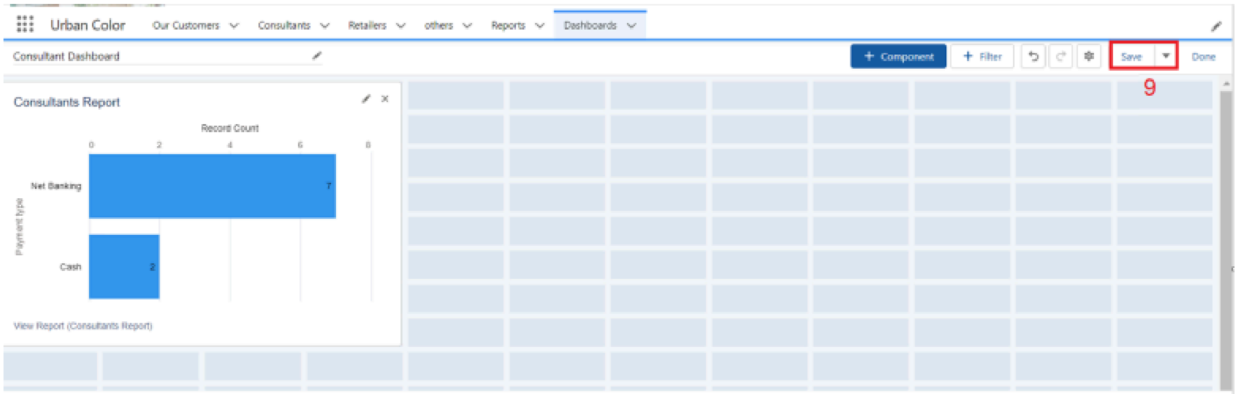
6. Choose Data Visualization:

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



7. Save Your Dashboard:

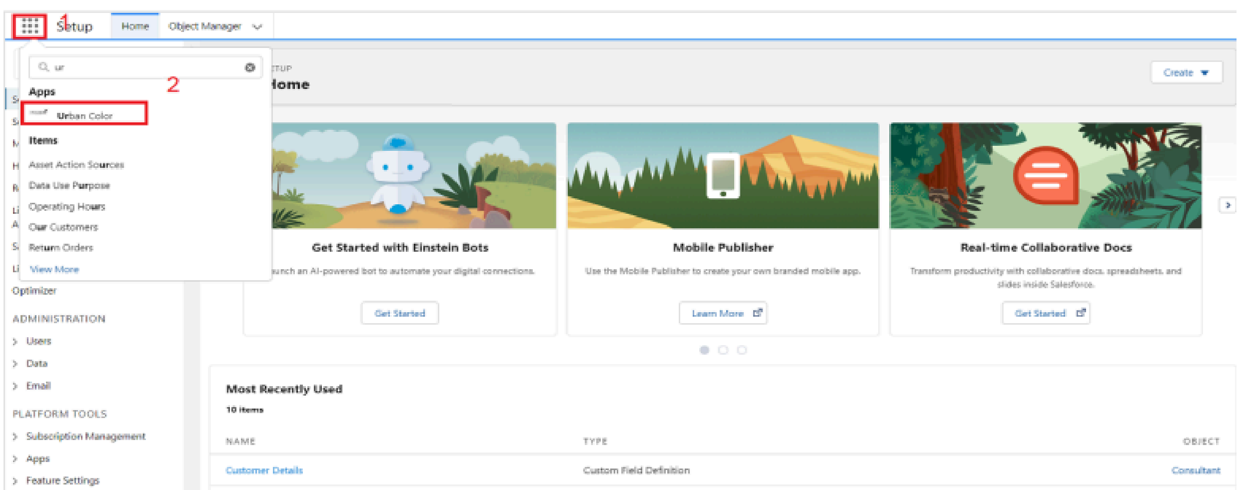
- After configuring the components and visualizations, click "Save" to finalize your dashboard



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