Cosmetics Store Management Documentation

Cosmetics Store Management in Salesforce offers a comprehensive solution for managing store operations efficiently on a scalable platform. Built on Salesforce, it helps businesses enhance customer engagement, streamline sales, and manage inventory effectively. Key features include creating custom objects, such as "Our Customers," "Consultants," and "Retailers," enabling stores to tailor data management according to their needs. Salesforce's Object Manager allows easy customization, while page layouts and Lightning apps enhance user experience by organizing fields and navigation options. Profiles and roles, such as "Store Supervisor" and "Billing Operator," provide controlled access and permissions, ensuring users interact with relevant data. Moreover, reports and dashboards empower businesses to track performance and visualize data effectively. With tools like custom report types and dashboard filters, stores can generate valuable insights into sales and customer behavior, supporting data-driven decision-making. This solution is ideal for cosmetics stores looking to boost operational efficiency and foster growth through technology.

Understanding Salesforce Editions

Before creating a Salesforce Developer Edition account, it's essential to be familiar with the different Salesforce Editions, each designed to meet specific business requirements:

1. **Essentials:** Best for small businesses, it includes basic CRM tools for sales and service productivity, with a setup assistant for easy customization.
2. **Professional:** Suitable for small to midsize businesses, offering full CRM functionality, customization, integration, and administration tools to support business growth.
3. **Enterprise:** Ideal for large, complex businesses, providing advanced customization, administrative tools, and API access for integrations and large-scale deployments.
4. **Unlimited:** Enhances the functionality of the Enterprise Edition by adding Premier Support, increased storage, unlimited custom apps, and full mobile access.
5. **Developer:** Focused on developers, this edition offers access to the Lightning Platform, APIs, and tools for building custom applications and integrations. It includes many features of the Enterprise Edition, allowing developers to explore the platform's full potential.

Cosmetics Store Management: Salesforce Administration Tasks

As a Salesforce Administrator for **Cosmetics Store Management**, there are several key activities and functionalities you need to manage within Salesforce. This environment will help you create and manage the essential tasks for running the cosmetics store efficiently.

Salesforce Setup:

1. **Creation of Salesforce Org:** Set up a new Salesforce Developer Org for development

and testing.

2. **Object Management:** Create custom objects to manage data, tailored to business needs.
3. **Fields and Relationships:** Define and configure relationships between objects to improve data consistency and reporting.
4. **Page Layouts:** Customize the interface for users by adjusting the page layouts of records.
5. **The Lightning App:** Set up Lightning applications for enhanced user experience and access to features.
6. **Profiles and Roles:** Manage user permissions and access levels by defining profiles and setting up roles.
7. **User Management:** Add, manage, and deactivate users within the organization.
8. **User Adoption:** Drive engagement and encourage users to adopt new features and tools within Salesforce.
9. **Data Import:** Import and manage external data through Salesforce's import features.
10. **Reports:** Create detailed reports to visualize data and provide insights.
11. **Dashboards:** Develop custom dashboards to present key metrics and data analytics in a visual format.

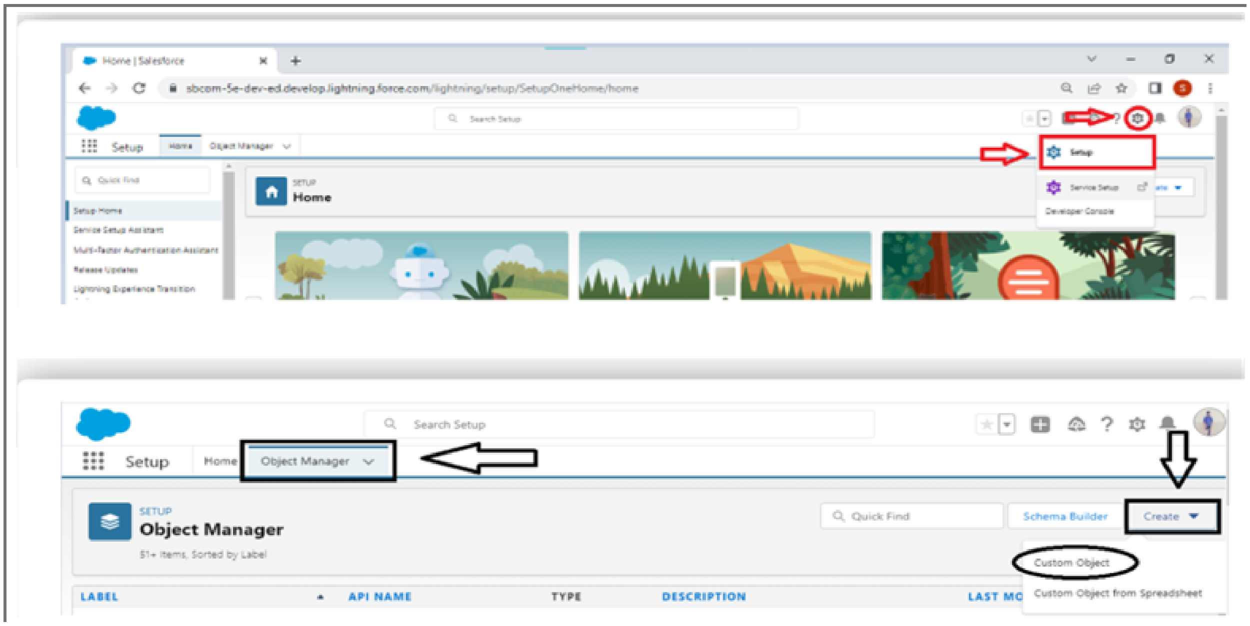
Creating Objects in Salesforce for Urban Color

Overview:

For the Urban Color project, four custom objects are created: **Our Customers**, **Consultants**, **Retailers**, and **Others**. These objects represent essential data categories for the business. Salesforce custom objects allow storing and managing data specific to an organization's needs. Below are the steps to create each object.

Steps to Create an Object:

1. **Access Object Manager**:
    - Click the gear icon in Salesforce.
    - Select **Setup**.
    - In **Object Manager** (next to Home tab), select **Create Dropdown.**
    - Choose **Custom Object.**



Our Customer Object:

1. **Label**: Our Customer
2. **Plural Label**: Our Customers
3. **Record Name**: Our Customer
4. Check **Allow Reports** and **Allow Search**.
5. Click **Save**.
6. Create a **Custom Tab** by navigating to **Tabs** under Setup, select **Our Customer**, choose an icon and save.

Consultants Object:

7. **Label**: Consultant
8. **Plural Label**: Consultants
9. **Record Name**: Consultants
10. Check **Allow Reports** and **Allow Search**.
11. Click **Save**.
12. Create a **Custom Tab** as with Our Customer, but select **Consultants** as the object.

Retailers Object:

13. **Label**: Retailer
14. **Plural Label**: Retailers
15. **Record Name**: Retailers
16. Check **Allow Reports** and **Allow Search**.
17. Click **Save**.

18. Create a **Custom Tab** by selecting **Retailers** as the object and saving the default settings.

Others Object:

19. **Label**: Other
20. **Plural Label**: Others
21. **Record Name**: Others
22. Check **Allow Reports** and **Allow Search**.
23. Click **Save**.
24. As before, create a **Custom Tab** for the **Others** object.

These steps help you create and organize data specific to the Urban Color business, supporting efficient record management in Salesforce.

Fields and Relationships in Salesforce

An **object relationship** in Salesforce establishes a two-way link between two objects, allowing users to view related data when accessing records. Relationships are created using custom relationship fields, enhancing data navigation and accessibility. Below are the fields and their data types for the **Our Customers** and **Consultants** objects, along with their relationships.

Fields in Our Customers Object:

The **Our Customers** object contains key fields that hold customer-specific data. The fields and their data types are as follows:

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

Fields in Consultants Object:

The **Consultants** object stores information about the consultants with additional details for customer interaction and transactions.

Fields In Consultants Objects

Fields in Consultants objects follow below data types:

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

Fields in Retailers Object

The **Retailers** object follows the same structure as the **Consultants** and **Others** objects, meaning it has the same fields and data types. This uniformity allows users to efficiently manage data across different roles (Consultants, Retailers, Others) with consistent data entry and processing.

Fields in Retailers Object:

1. Retailer ID
2. Retailer Name
3. Mobile Number
4. Email ID
5. Delivery Type (Picklist)
6. Products (Multi-Picklist)
7. Payment (Picklist)
8. Customer Details (Lookup)
9. Address (Text Long)

By maintaining this standard structure, users can easily handle records and ensure smooth data management across all objects in the system.

Fields in Others Object

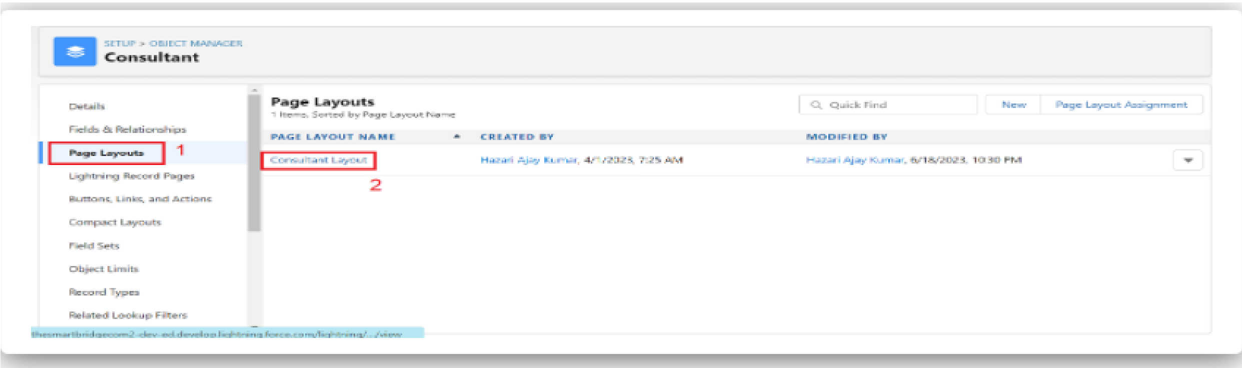
The **Others** object follows the same structure as the **Consultants** and **Retailers** objects, meaning it has the same fields and data types. This consistency ensures easy management of data across different object types, allowing users to handle records for various roles (Consultants, Retailers, Others) with uniformity. ● **Fields in Others Object**:

- Retailer ID
- Retailer Name
- Mobile Number
- Email ID
- Delivery Type (Picklist)
- Products (Multi-Picklist)
- Payment (Picklist)
- Customer Details (Lookup)

Creating and Customizing Page Layouts in Salesforce

1. **Access Object Manager**: Go to the Salesforce setup menu and select **Object Manager**.
2. **Select the Object**: Click on **Consultants**.
3. **Navigate to Page Layouts**: Click on **Page Layouts** in the left sidebar.
4. **Create a New Layout**:
    - Click **New** to create a new layout or clone an existing one.
    - Enter a **Layout Name** and description, then click **Save**.

5. **Customize the Layout**:
   - **Arrange Fields**: Drag fields onto the layout.
   - **Add Related Lists**: Include related lists by dragging them to the layout.
   - **Configure Buttons**: Add or rearrange buttons as needed.
   - **Set Properties**: Adjust field properties for visibility and requirements.
   - **Preview and Save**: Use the **Preview** button and click **Save** once satisfied.
6. **Assign Layout to Profiles**:
   - Click on **Page Layout Assignment** to assign the layout to specific profiles and save the changes.
7. **Testing**: Log in as a user with the assigned profile to ensure the layout works as intended.



Creating a Lightning App in Salesforce

1. **Access App Manager**:
   - Go to **Setup**.
   - Search for **App Manager** in the Quick Find box and select it.
2. **Create New Lightning App**:
   - Click on **New Lightning App**.

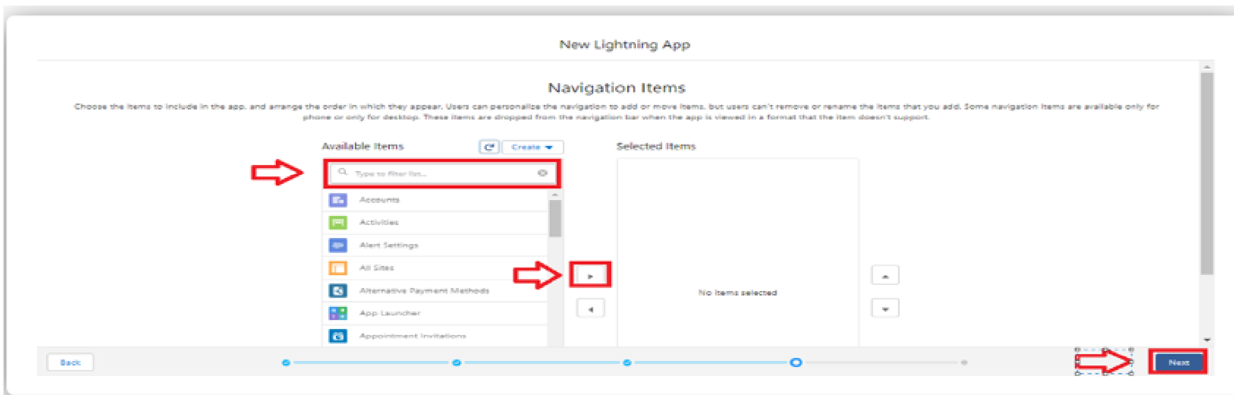
3. **Fill App Details**:
   - Enter **App Name**: *Urban Color*.
   - Customize branding options as needed.
   - Click **Next**.

1. **App Options**:
   - Keep the default settings and click **Next**.
2. **Utility Items**:
   - Keep default utility items and click **Next**.
3. **Add Navigation Items**:

■ Search for and select the following items:

  - **Our Customers**
  - **Consultants**
  - **Retailers**
  - **Others**
  - **Reports**
  - **Dashboards**

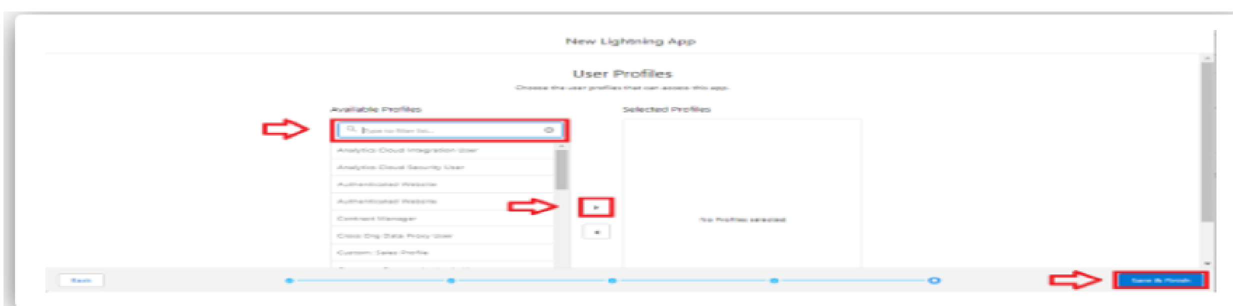
■ Move them to the navigation bar using the arrow button, then click **Next.**



1. **Add User Profiles**:

   ■ Search for **System Administrator** in the profiles search bar and move it using the arrow button.

   ■ Click **Save & Finish**.

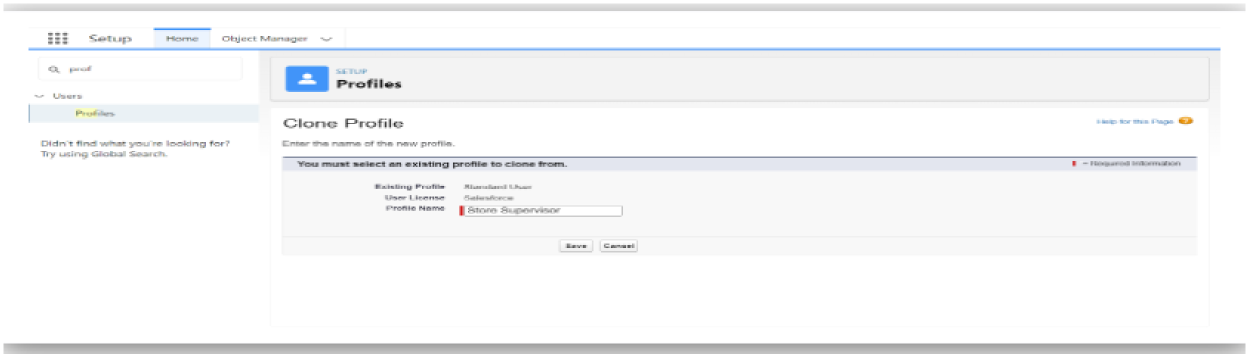


Creating a Store Supervisor Profile in Salesforce

1. **Access Profiles**:

   ■ Go to **Setup**.

   ■ Type **Profiles** in the Quick Find box and select it.



1. **Clone a Profile**:

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

   ■ Click **Clone**.

2. **Set Profile Name**:

   ■ Enter **Profile Name**: *Store Supervisor*.

   ■ Click **Save**.

3. **Edit Profile Permissions**:

   ■ On the Store Supervisor profile page, click **Edit**. ■ Scroll down to **Custom Object Permissions**: ■ Grant access for:

   ■ Create

   ■ Read

   ■ Edit

   ■ Delete

   ■ View All

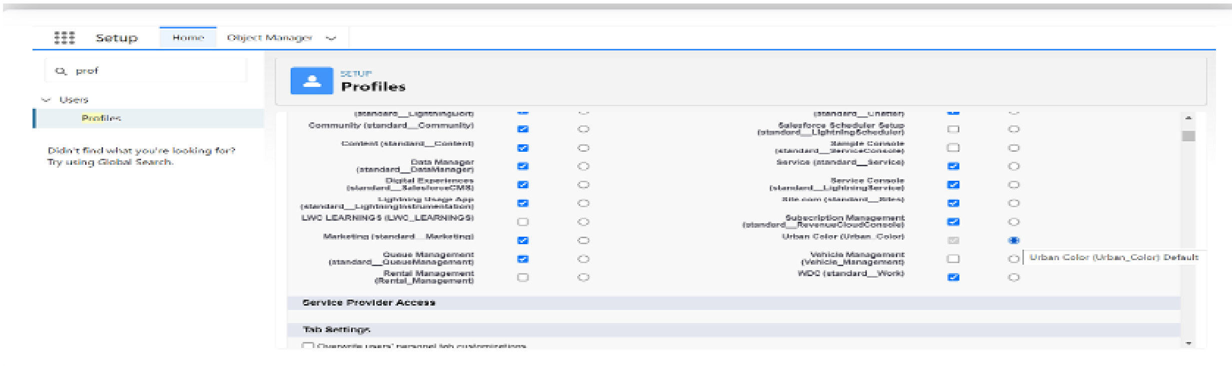
   ■ Modify All

   ■ for the following objects: ■ **Our Customers**

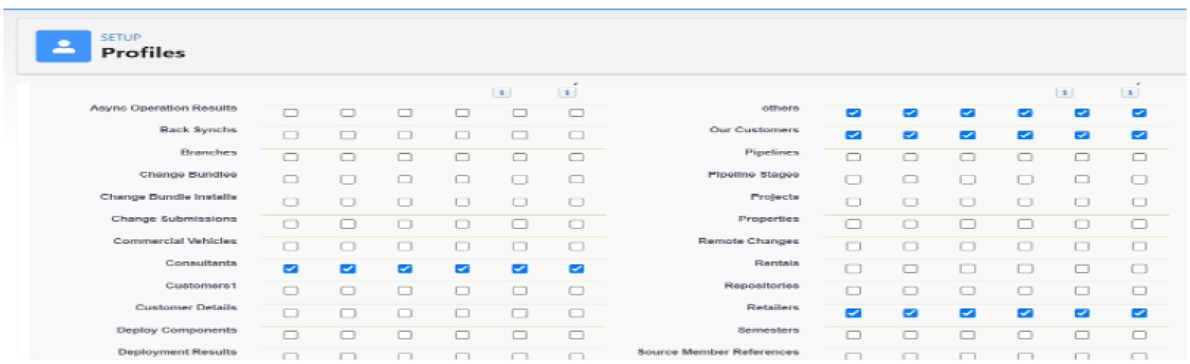
   ■ **Consultants**

   ■ **Retailers**

   ■ **Others**



Scroll down to the Custom object permission and give all access to the Consultants, Others, Our Customers, Retailers object.



Custom App Settings:

■ Scroll down to **Custom App Settings** and grant access to the **Urban Color** app. ■ Click **Save**.

Creating an Operator Profile

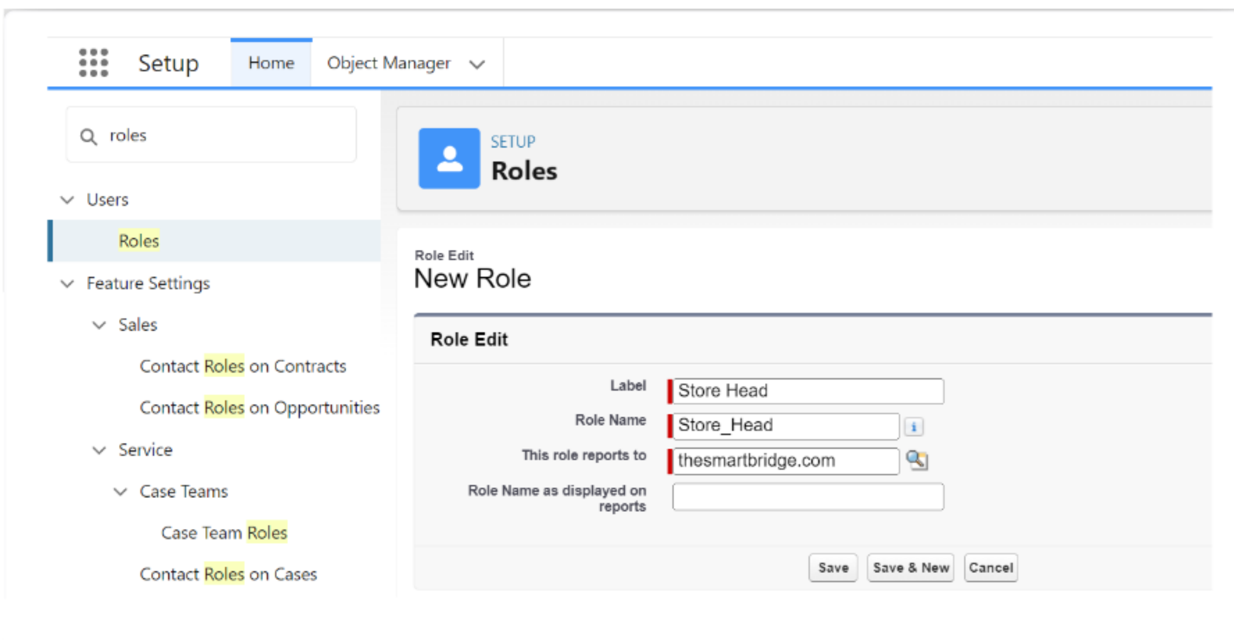
1. **Clone Profile**:
   - ■ Go to **Setup** > **Profiles**.
   - ■ Clone the **Salesforce Platform User** profile.
2. **Set Profile Name**:
   - ■ Enter **Profile Name**: *Operator*.
   - ■ Click **Save**.
3. **Edit Permissions**:
   - ■ On the Operator profile page, click **Edit**.
   - ■ Scroll down to **Custom Object Permissions** and grant access for **Billing Operator** only.
4. **Save Changes**: ■ Click **Save**.

Summary of Key Steps

1. Use the **Clone** feature to create profiles based on existing ones.
2. Modify **Custom Object Permissions** and **Custom App Settings** as needed. ● Always remember to **Save** your changes after editing profiles.

Setting Up Roles in Salesforce

1. **Access Setup**:
   - Click on the **Gear Icon.**
   - Select **Setup.**
2. **Find Roles**:
   - In the **Quick Find** box, type **Roles.**
   - Click on **Roles.**
3. **Set Up Roles**:
   - Click on **Set Up Roles.**



1. **Expand Role Hierarchy**:
   - Click on **Expand All** to view the existing roles.
2. **Create Store Head Role**:
   - Under the **CEO**, click on **Add Role.** ■ Fill in the details:
     - **Label**: *Store Head*
     - **Role Name**: *Store_Head*
   - Enter a role name that will appear on reports.

■ Click **Save**.

1. **Create Billing Operator Role**:

   ■ Similarly, under **Store Head**, click on **Add Role**.

   ■ Fill in the required details for **Billing Operator**. ■
   Click **Save**.

Summary of Key Steps

1. Navigate to the **Roles** section through Setup.
2. Create roles under the appropriate hierarchy, specifying labels and names. ●
   Ensure you save each role after creation.

Creating a User in Salesforce

1. **Access Users**:

   ■ From **Setup**, type **Users** in the Quick Find box and select **Users**.

2. **Add New User**:

   ■ Click **New User**.

3. **Fill in User Details**:

   ■ **Name**: Enter the user's name (e.g., *Amar K*).

   ■ **Email Address**: Enter a valid email address.

   ■ **Username**: Enter a unique username (typically in the format of an email address). By default, this will match the email address.

   ■ **Role**: Select the role (e.g., *Store Head*).

   ■ **User License**: Select **Salesforce**.

   ■ **Profile**: Select **Store Supervisor**.

4. **Generate Password**:

   ■ Check the box for **Generate new password and notify user immediately**. This will send the user their login details and a temporary password.

5. **Complete User Information**:

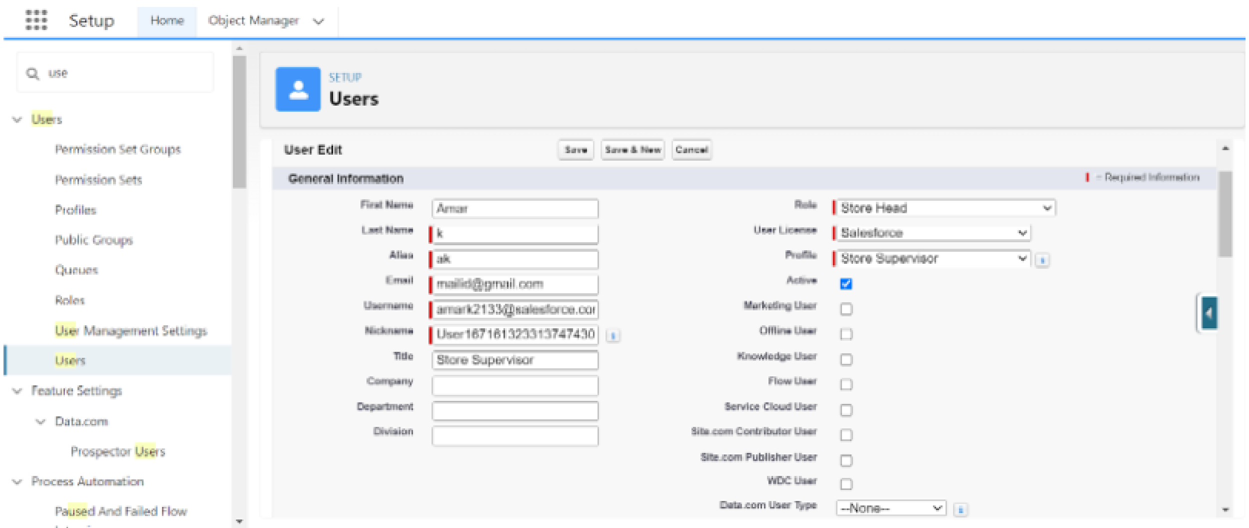
   ■ Fill in any other required fields (e.g., First Name, Last Name, Alias, Nickname).

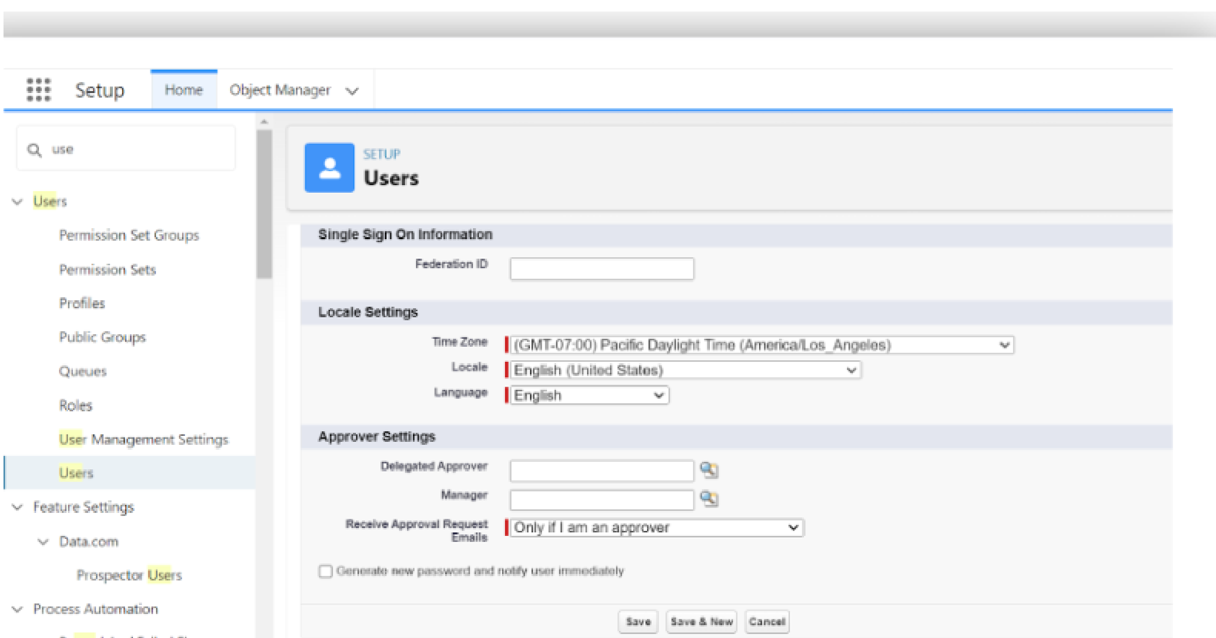
6. **Save the User**:

   ■ Click **Save** to create the new user account.

Summary of Key Steps

1. Navigate to the **Users** section in Setup.
2. Provide necessary details for the new user, ensuring unique usernames and correct roles.
3. Enable the password generation option to notify the user.

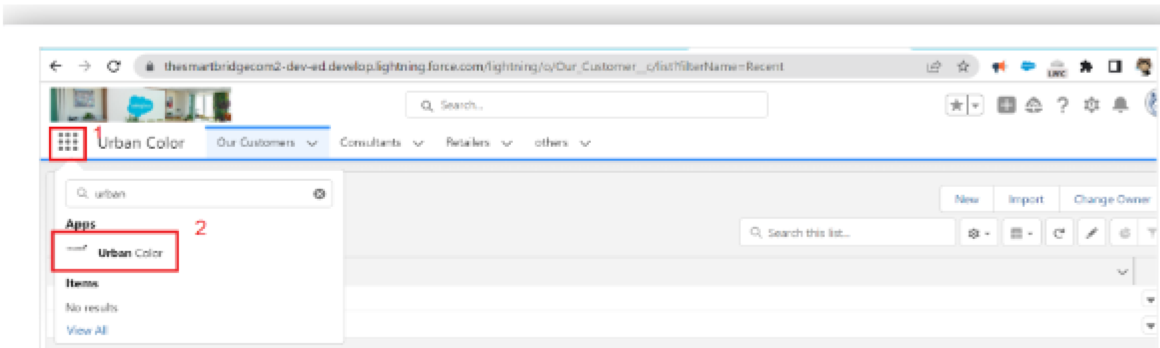


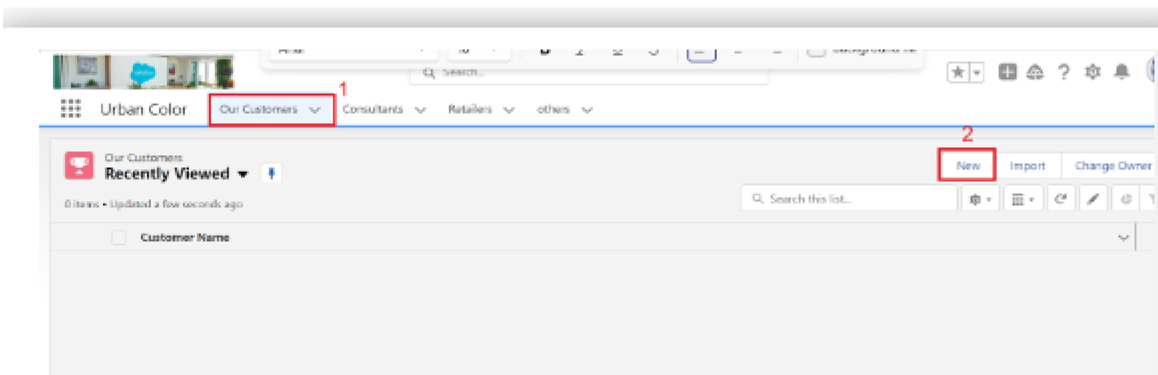


User Adoption and Navigation in Salesforce

Creating an Our Customer Record

1. **Access Urban Color App**:
    - ■ Click on the **App Launcher** on the left side of the screen.
    - ■ Search for **Urban Color** and click on it.
2. **Create New Customer Record**:
    - ■ Click on the **Our Customer** tab.
    - ■ Click the **New** button.
    - ■ Fill in all required details for the customer record.
    - ■ Click the **Save** button.





Viewing an Our Customer Record

1. **Access Urban Color App**:
    - ■ Click on the **App Launcher** on the left side of the screen.
    - ■ Search for **Urban Color** and click on it.
2. **View Customer Record**:
    - ■ Click on the **Our Customer** tab.
    - ■ Click on the name of any customer record to view its details.

Deleting an Our Customer Record

1. **Access Urban Color App**:

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

■ Search for **Urban Color** and click on it.

2. **Delete Customer Record**:

■ Click on the **Our Customer** tab.

■ Find the record you want to delete.

■ Click the **arrow** (dropdown) on the right-hand side of that particular record. ■ Select **Delete** and confirm by clicking **Delete** again.

Importing Data Using the Data Import Wizard

1. **Access Data Import Wizard**:

■ From **Setup**, click the **Home** tab.

■ In the **Quick Find** box, enter **Data Import** and select **Data Import Wizard**.

2. **Launch the Wizard**:

■ Click on **Launch Wizard!**.

3. **Select Custom Object**:

■ Click on the **Custom Objects** tab.

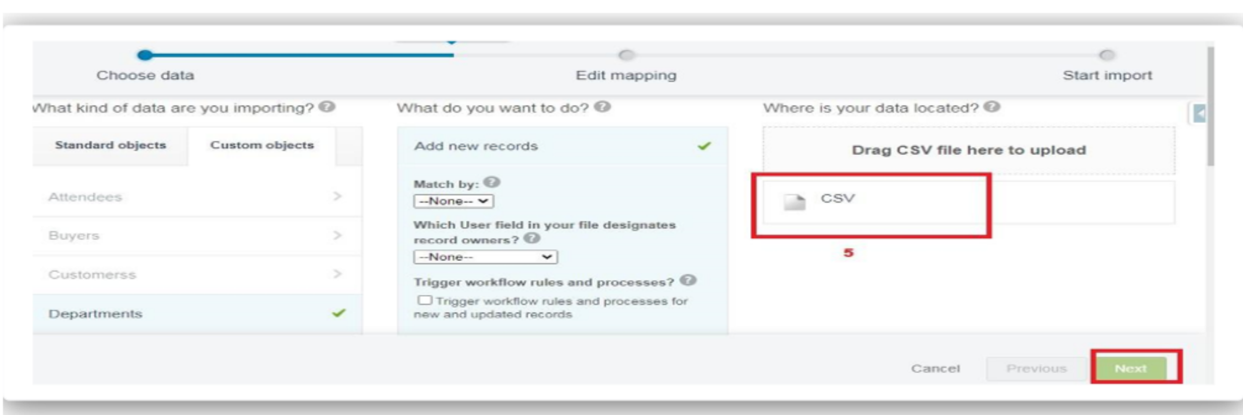
■ Select the **Consultant** object.

4. **Choose Import Type**:

■ Select **Add new records**.

5. **Upload CSV File**:

■ Click **CSV** and choose the file named *Consultant_CSV* that you prepared earlier. ■ Click **Next**.



1. **Field Mapping**:

■ Since the field names in your CSV (CSV Header) match the field names in Salesforce (Mapped Salesforce Object), the fields will be automatically mapped. ■ Click

Next.

2. **Review Import Summary**:
   - The next screen will display a summary of your data import. Review it carefully. ■ Click **Start Import**.
3. **Confirm Import**:
   - Click **OK** on the popup that appears.
4. **Verify Import**:
   - Scroll down the page and check the **batches** section to verify that your data has been imported.
   - Ensure that there are **0 records** under the **Records Failed** column.

Important Note

- **Field Mapping**: Be sure to double-check the field mapping to ensure data is imported correctly.

REPORTS

What Are Reports?

- Reports in Salesforce are lists of records meeting specific criteria, displayed in a table format that can be filtered and grouped.

Types of Report Formats:

1. **Tabular Reports**: Simple tables with records and a grand total; cannot create groups or charts.
2. **Summary Reports**: Commonly used; allows grouping, subtotals, and charts.
3. **Matrix Reports**: Complex format summarizing data in a grid, allowing grouping by rows and columns.
4. **Joined Reports**: Display data from multiple report types in organized blocks.

Report Types:

1. **Standard Report Types**: Automatically included with objects; cannot be customized.
2. **Custom Report Types**: Created by users for specific needs, allowing customization of available objects.

Access Levels of Report Folders:

1. **Viewer**: Can see data but not modify it.
2. **Editor**: Can view and modify reports, and move them.

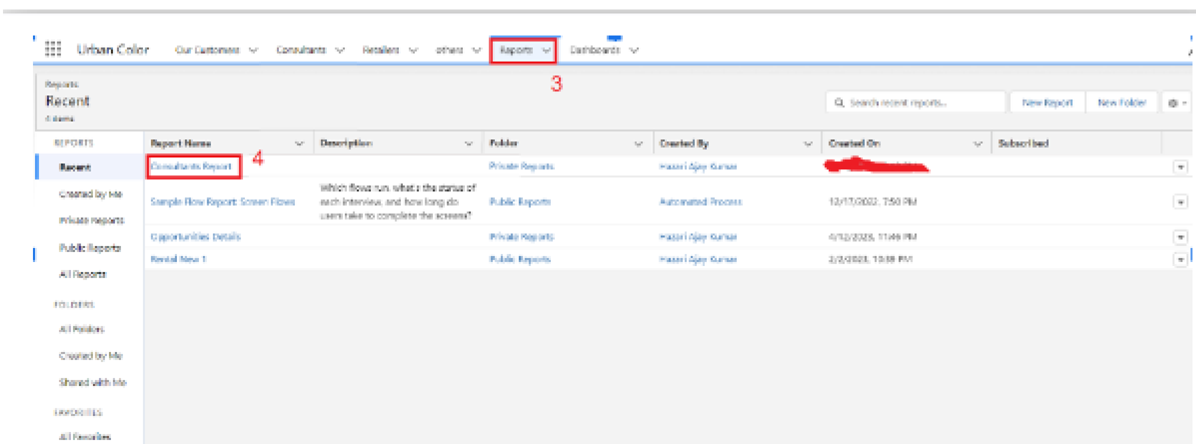
3. **Manager**: Full control, including managing user access and deleting reports.

Steps to Create a Report:

1. Access the **Urban Color App** via the App Launcher.
2. Go to the **Reports** tab and click **New Report**.
3. Select the **Consultants** report type and customize the report by adding columns like **Consultant Name**, **Delivery Type**, **Products**, and **Payment**.
4. Use bucket fields to categorize payment types (e.g., **NetBanking**, **Cash**).
5. Apply changes, group rows, refresh, and save the report as **Consultant Report**.

Steps to View the Report:

1. Access the **Urban Color App** via the App Launcher.
2. Navigate to the **Reports** tab and click on the **Urban Color Report** to view the records.



DASHBOARD

What Are Dashboards?

- Dashboards allow users to curate data from reports using various visualizations like charts, tables, and metrics. They provide insights at a glance and can include filters for different data perspectives.

Steps to Create a Dashboard

1. **Access Dashboards**:

■ Click on the **Dashboards** tab from the **Urban Color** application.

2. **Create New Dashboard**:

   ■ Click on **New Dashboard**.

   ■ Name your dashboard **Consultant Dashboard** and click **Create**.

3. **Add Components**:

   ■ Click on **+Component**.

   ■ Select the **Consultants Report** you created earlier.

   ■ Choose a data visualization type (chart, table, etc.) based on your requirement. ■ Click **Add**.

4. **Save the Dashboard**:

   ■ Click **Save** to finalize your dashboard.

Steps to View a Dashboard

1. **Access the App Launcher**:

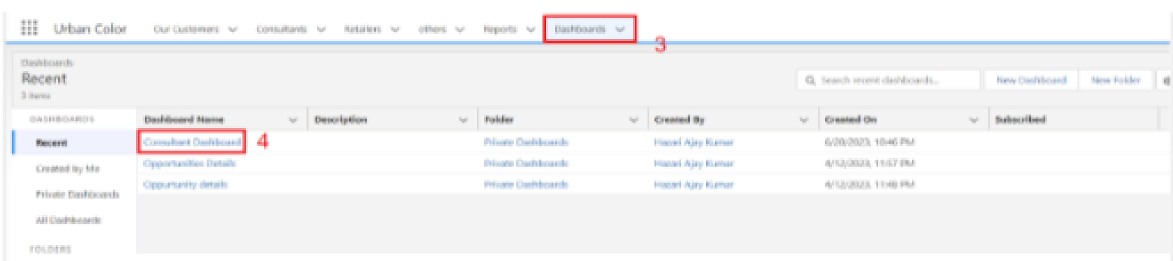
   ■ Click on the **App Launcher** on the left side of the screen.

   ■ Search for **Candidate Internal Result Card** and click on it.

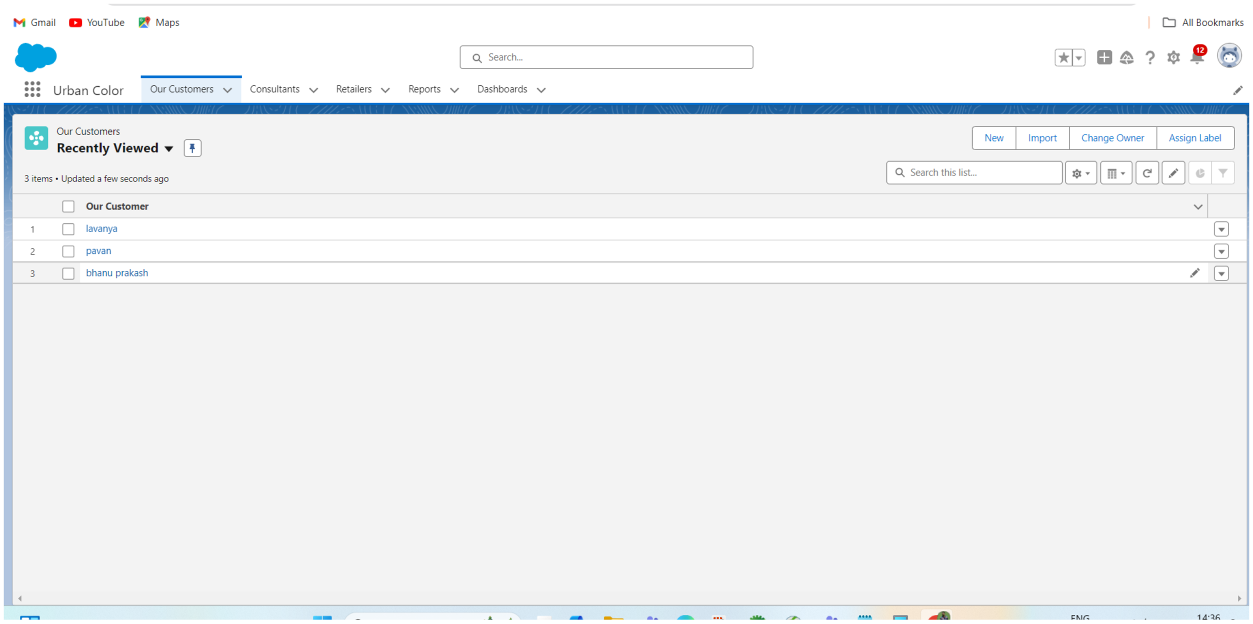
2. **View Dashboard**:

   ■ Click on the **Dashboard** tab.

   ■ Select **Candidate Internal Result Card** to see the graphical view of records.



FINAL SCREENSHOT OF THE PROJECT:



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