

Screenshots of Cosmetics Store Management

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Objects

1. Our Customer

The screenshot shows the Salesforce Setup interface for the 'Our Customer' object. The left sidebar contains a 'Details' menu with options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main content area is titled 'Our Customer' and includes a 'Details' section with the following fields:

Field	Value
Description	
API Name	Our_Customer__c
Custom	✓
Singular Label	Our Customer
Plural Label	Our Customers
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Buttons for 'Edit' and 'Delete' are located in the top right corner of the details section.

2. Consultant

The screenshot shows the Salesforce Setup interface for the 'Consultant' object. The left sidebar contains a 'Details' menu with options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main content area is titled 'Consultant' and includes a 'Details' section with the following fields:

Field	Value
Description	
API Name	Consultant__c
Custom	✓
Singular Label	Consultant
Plural Label	Consultants
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Buttons for 'Edit' and 'Delete' are located in the top right corner of the details section.

3. Retailer

Setup

Home

Object Manager

Search Setup

12

SETUP > OBJECT MANAGER

Retailer

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Details

Description

API Name

Retailer_c

Custom

✓

Singular Label

Retailer

Plural Label

Retailers

Enable Reports

✓

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

Edit

Delete

4. Other

Setup

Home

Object Manager

Search Setup

All Bookmarks

SETUP > OBJECT MANAGER

other

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Details

Description

API Name

other_c

Custom

✓

Singular Label

other

Plural Label

others

Enable Reports

✓

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

Edit

Delete

Fields and Relationships

Setup

Home

Object Manager

Search Setup

Star

Share

Help

Settings

12

Profile

Our Customer

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Fields & Relationships

10 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Additional Information	Additional_Information__c	Text Area(255)		
Address	Address__c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
Customer id	Customer_Id__c	Auto Number		
Customer Name	Customer_Name__c	Text(255)		
Email id	Email_Id__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Mobile Number	Mobile_Number__c	Phone		

Setup

Home

Object Manager

Search Setup

Star

Share

Help

Settings

12

Profile

Consultant

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Fields & Relationships

13 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Long Text Area(32768)		
Consultants	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Customer details	Customer_details__c	Lookup(Our Customer)		✓
Customer id	Customer_Id__c	Auto Number		
Customer Name	Customer_Name__c	Text(255)		
Delivery Type	Delivery_Type__c	Picklist		
Email id	Email_Id__c	Email		

Setup

Home

Object Manager

Search Setup

Star

Plus

Refresh

Help

Settings

12

Profile

Setup > OBJECT MANAGER

Retailer

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Fields & Relationships

11 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

Created By	CreatedById	Lookup(User)		
Customer Details	Customer_Details__c	Master-Detail(Our Customer)	✓	
Customer id	Customer_id__c	Auto Number		
Customer Name	Customer_Name__c	Text(255)		
Delivery Type	Delivery_Type__c	Picklist		
Email id	Email_id__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Mobile Number	Mobile_Number__c	Phone		
Payment	Payment__c	Picklist		

Setup

Home

Object Manager

Search Setup

Star

Plus

Refresh

Help

Settings

12

Profile

Setup > OBJECT MANAGER

other

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Fields & Relationships

8 Items, Sorted by Field Label

Quick Find

New

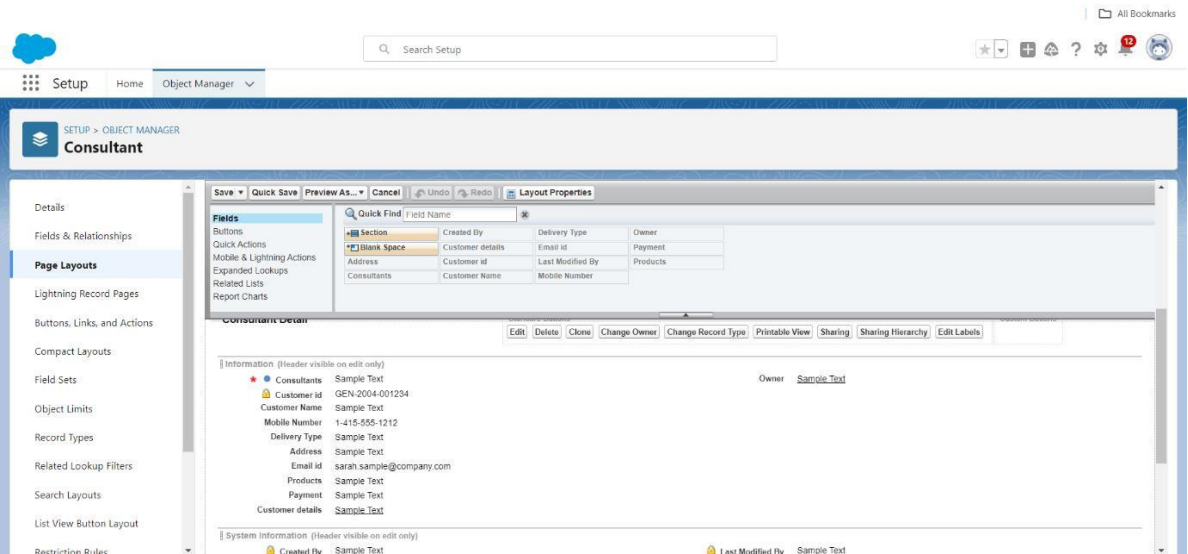
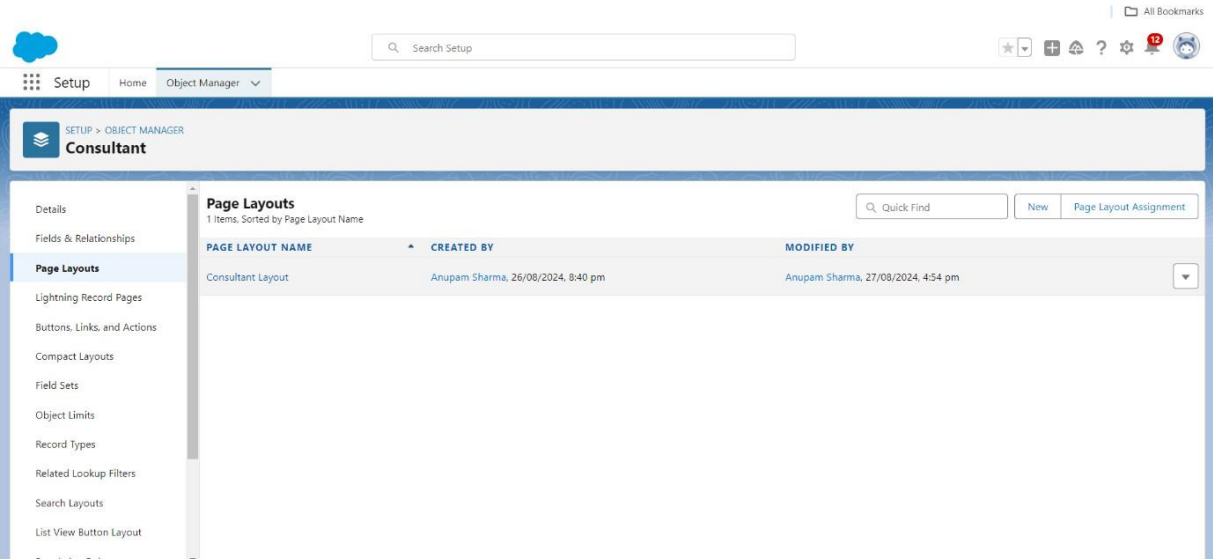
Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Coupon	Coupon__c	Text(255)		
Created By	CreatedById	Lookup(User)		
Employee	Employee__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Text(255)		
others	Name	Text(80)		✓
Owner	OwnerId	Lookup(User,Group)		✓
Products	Products__c	Picklist (Multi-Select)		

Page Layout



The Lightning App

New Lightning App

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.


App Details

* App Name ¹
Urban Color

* Developer Name ¹
Urban

Description ¹
Enter a description...

App Branding

Image ¹
 Upload

Primary Color Hex
Value ¹
#0070D2

Org Theme Options
☐ Use the app's image and color instead of the org's custom theme.

Next

Lightning Experience App Manager

New Lightning App New Connected App

Sorted by App Name • Filtered by All appmenuitems - TabSet Type

	App Name ↑	Developer Name	Description	Last Modified Date	App Type	Visibl...
1	App Launcher	AppLauncher	App Launcher tabs	26/08/2024, 7:29 pm	Classic	✓
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	26/08/2024, 7:29 pm	Classic	✓
3	App Launcher	AppLauncher	App Launcher tabs	26/08/2024, 7:29 pm	Classic	✓
4	Automation	FlowsApp	Automate business processes and repetitive tasks.	26/08/2024, 7:35 pm	Lightning	✓
5	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	26/08/2024, 7:34 pm	Lightning	✓
6	Community	Community	Salesforce CRM Communities	26/08/2024, 7:29 pm	Classic	✓
7	Content	Content	Salesforce CRM Content	26/08/2024, 7:29 pm	Classic	✓
8	Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	26/08/2024, 7:29 pm	Lightning	✓
9	Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	26/08/2024, 7:29 pm	Lightning	✓
10	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	26/08/2024, 7:29 pm	Lightning	✓
11	Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	26/08/2024, 7:29 pm	Classic	✓
12	Platform	Platform	The fundamental Lightning Platform	26/08/2024, 7:29 pm	Classic	✓

Urban Color

Our Customers Consultants Retailers others Reports Dashboards

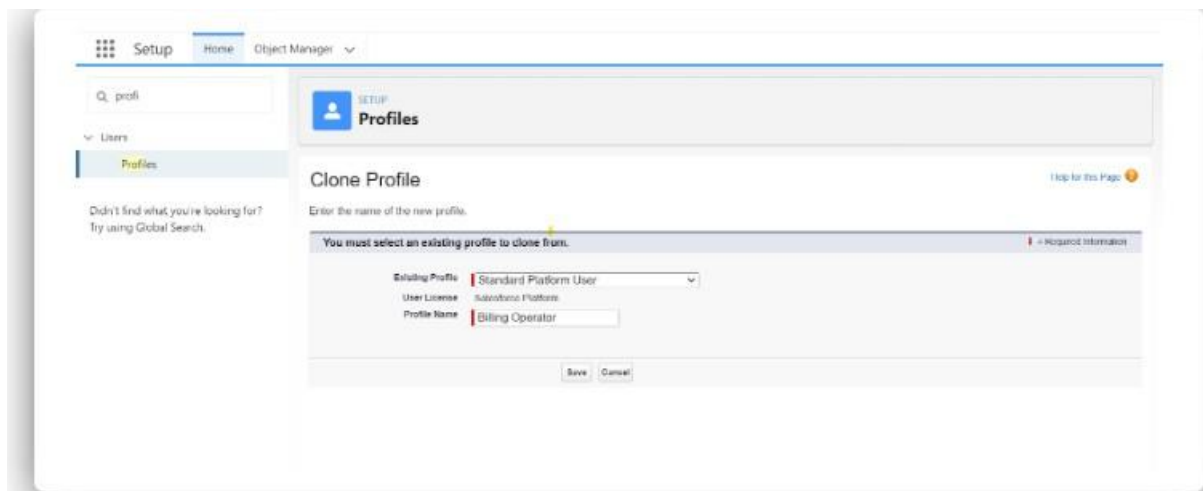
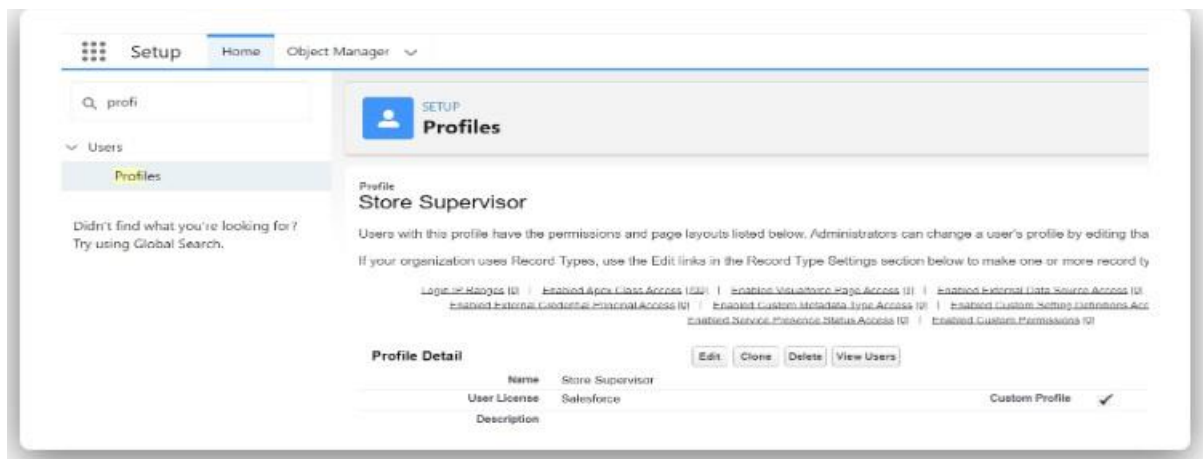
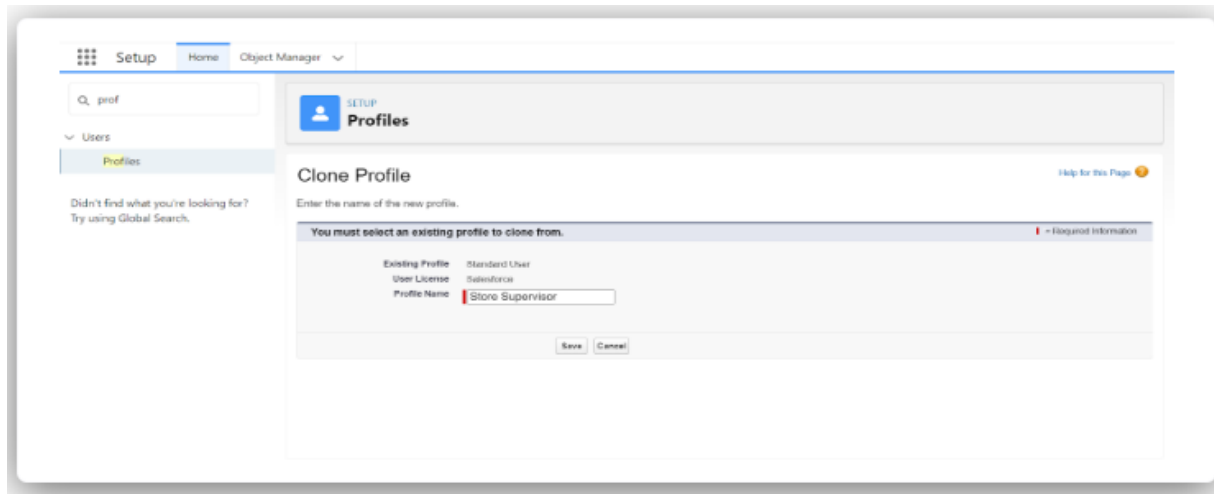
Recently Viewed

0 items • Sorted by Our Customer • Updated a few seconds ago

Search this list...

You haven't viewed any Our Customers recently.
Try switching list views.

Profile



Setup Roles

Setup

Home

Object Manager

Q prof

Users

Profiles

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

SETUP

Profiles

Clone Profile

Help for this Page

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile

Standard User

User License

Salesforce

Profile Name

Store Supervisor

Save

Cancel

Setup

Home

Object Manager

Q profi

Users

Profiles

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

SETUP

Profiles

Profile

Store Supervisor

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing the user's record.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record type available to users with this profile.

Log in & Logout (R)

Enabled Apex Class Access (CU)

Enable Visualforce Page Access (R)

Enabled External Data Source Access (R)

Enabled External Content External Access (R)

Enabled Custom Metadata Type Access (R)

Enabled Custom Setup Extensions Access (R)

Enabled Service Presence Status Access (R)

Enabled Custom Permissions (R)

Profile Detail

Edit

Clone

Delete

View Users

Name

Store Supervisor

User License

Salesforce

Description

Custom Profile

✓

Setup

Home

Object Manager

Q profi

Users

Profiles

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

SETUP

Profiles

Clone Profile

Help for this Page

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile

Standard Platform User

User License

Salesforce Platform

Profile Name

Billing Operator

Save

Cancel

Users



User

Amar K

User Profile Help for this User

[Permission Set Assignments](#) | [Permission Set Assignments: Activation Required](#) | [Permission Set Group Assignments](#) | [Permission Set License Assignments](#) | [Personal Groups](#) | [Public Group Membership](#) | [Queue Membership](#) | [Managers in the Role Hierarchy](#) | [OAuth Apps](#) | [Third-Party Account Links](#) | [Installed Mobile Apps](#) | [Authentication Settings for External Systems](#) | [Login History](#) | [User Provisioning Accounts](#)

User Detail

[Edit](#) [Sharing](#) [Reset Password](#) [Freeze](#) [View Summary](#)

Name	Amar K	Role	
Alias	ak	User License	Salesforce
Email	214g1a33c0@srit.ac.in Verify	Profile	Store Supervisor
Username	214g1a33c0@srit.ac.in	Active	<input checked="" type="checkbox"/>
Nickname	User1727275246442481890 i	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	i
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> i
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> i
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/> i
App Registration: One-Time Password Authenticator	i	Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/> i
App Registration: Salesforce Authenticator	i	Salesforce CRM Content User	<input checked="" type="checkbox"/>
Security Key (U2F or WebAuthn)	i	Receive Salesforce CRM Content Email Alerts	<input checked="" type="checkbox"/>
Lightning Login	i	Receive Salesforce CRM Content Alerts as Daily Digest	<input checked="" type="checkbox"/>
Temporary Verification Code (Expires in 1 to 24 Hours)	Generate i	Make Setup My Default Landing Page	<input type="checkbox"/>

User

Jhon Teddy

User Profile Help for this Page

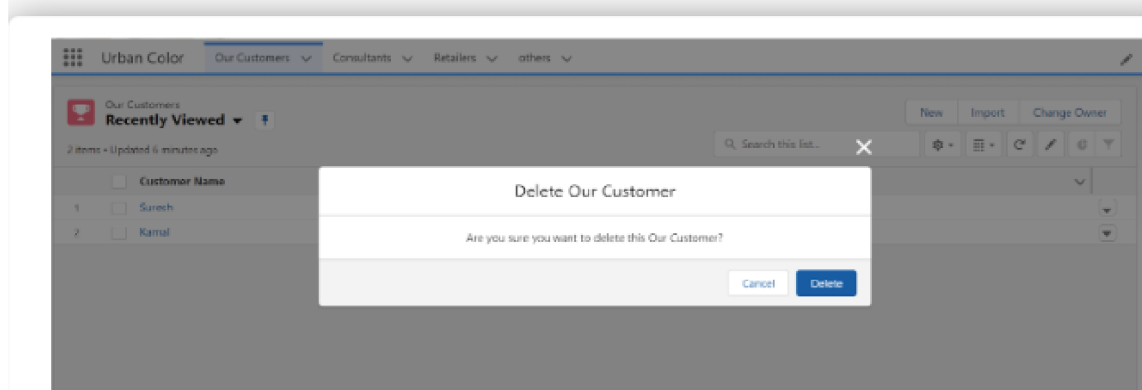
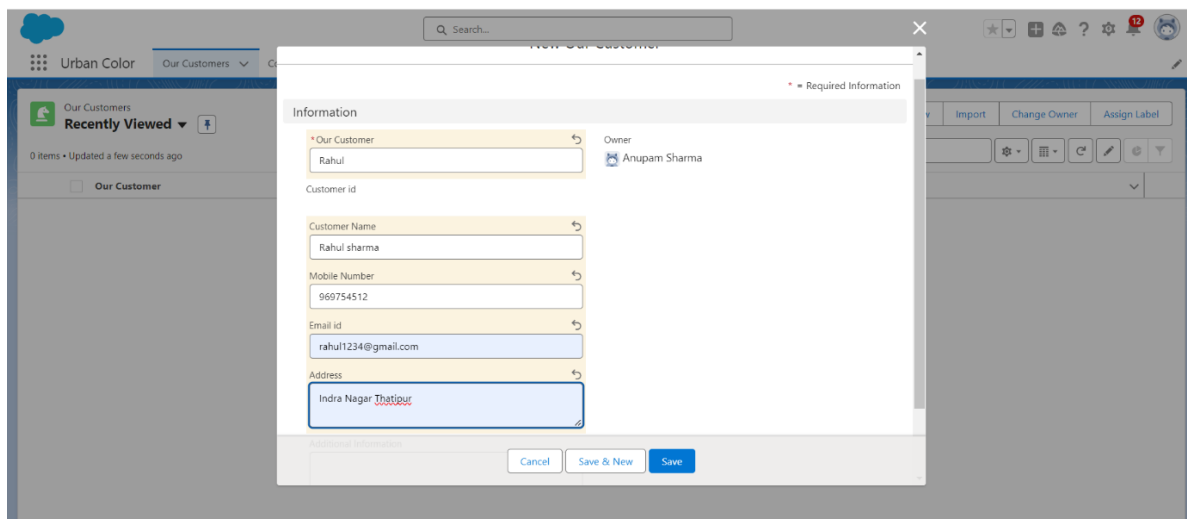
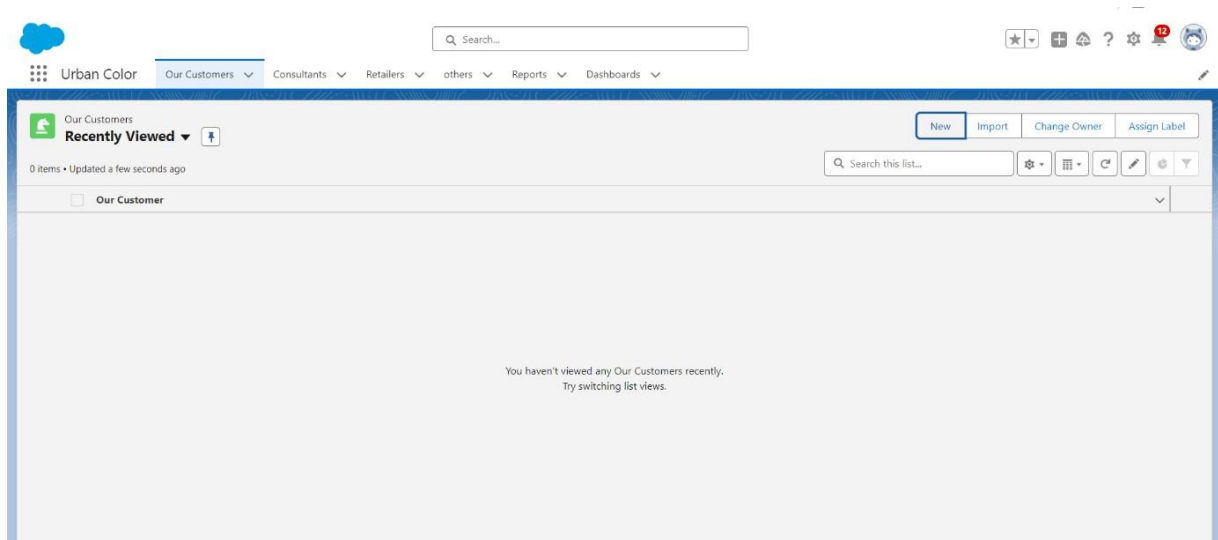
[Permission Set Assignments](#) | [Permission Set Assignments: Activation Required](#) | [Permission Set Group Assignments](#) | [Permission Set License Assignments](#) | [Personal Groups](#) | [Public Group Membership](#) | [Queue Membership](#) | [Team](#) | [Managers in the Role Hierarchy](#) | [OAuth Apps](#) | [Third-Party Account Links](#) | [Installed Mobile Apps](#) | [Authentication Settings for External Systems](#) | [Login History](#) | [User Provisioning Accounts](#)

User Detail


[Edit](#) [Sharing](#) [Reset Password](#) [Freeze](#) [View Summary](#)

Name	Jhon Teddy	Role	Billing Operator
Alias	jtedd	User License	Salesforce Platform
Email	214g1a33c0@srit.ac.in Verify	Profile	Billing Operator
Username	john214g1a33c0@srit.ac.in	Active	<input checked="" type="checkbox"/>
Nickname	User17272798366651633131 i	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	i
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> i
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> i
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/> i
App Registration: One-Time Password Authenticator	i	Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/> i
App Registration: Salesforce Authenticator	i	Salesforce CRM Content User	<input checked="" type="checkbox"/>
Security Key (U2F or WebAuthn)	i	Receive Salesforce CRM Content Email Alerts	<input checked="" type="checkbox"/>
Lightning Login	i	Receive Salesforce CRM Content Alerts as Daily Digest	<input checked="" type="checkbox"/>
Temporary Verification Code (Expires in 1 to 24 Hours)	Generate i	Make Setup My Default Landing Page	<input type="checkbox"/>

User Adoption



Import Data



Search Setup

Setup

Home


Object Manager

your data...


Don't import too many records at once
Using the Data Import Wizard, import up to 50,000 records at a time. Importing too many records can slow down your org for all users, especially during periods of peak usage.

Import your data in 3 easy steps!


Launch the Data Import Wizard to import your data.




Pre-step: Prepare your data for import



Choose data to import



Edit field mapping



Review and start import

Launch Wizard!

FAQ


How do I prepare my data for import?

How many records can I import?

What kind of objects can I import?

Can I do simultaneous imports?


Data Import video series



Additional Resources

Find import templates and other helpful tools

Learn how to use the Data Import Wizard



Search Setup

Setup

Home

Object Manager

Getting closer

Choose data

Edit mapping

Start import

What kind of data are you importing?

What do you want to do?

Where is your data located?

Standard objects

Custom objects

Consultants

Our Customers

Retailers

others

Add new records

Match by:

Which User field in your file designates record owners?

Which Our Customer field in your file do you want to match against to set the Customer details lookup field?

Trigger workflow rules and processes?

Drag CSV file here to upload

CSV

Cancel

Previous

Next

Choose data

Edit mapping

Start import

Review & Start Import

Review your import information and click Start Import.

Help for this page

Your selections:

Your import will include:

Your import will not include:

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

Mapped fields
7

Unmapped fields
0

Cancel

Previous

Start Import

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

OK

Reports

Urban Color

Our CustomersConsultantsRetailersothersReportsDashboards

Q Search...

★

+

🔍

?

⚙️

🔔

👤

Reports

Recent

1 item

Q Search recent reports...

New Report

New Folder

⚙️

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Consultant report		Private Reports	Anupam Sharma	27/8/2024, 7:04 pm	

Created by Me

Private Reports

Public Reports

All Reports

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

Urban Color

Our CustomersConsultantsRetailersothersReportsDashboards

Q Search...

★

+

🔍

?

⚙️

🔔

👤

Report: Consultants

Consultant report

Enable Field Editing

Q

Add Chart

⌵

↺

Edit

⌵

Total Records
16

<input type="checkbox"/> Payment type	Customer Name	Delivery Type	Products	Payment
<input type="checkbox"/> Cash (2)	Dev Raj	Self Pickup	Lipstick	Cash
	Dev Raj	Self Pickup	Lipstick	Cash
Subtotal				
<input type="checkbox"/> NetBanking (6)	Ajay	Courier	Compact	UPI
	Ram	Courier	EyeLiner	Credit Card
	Shyam	Self Pickup	FacePack	Debit Card
	Arun	Self Pickup	FacePack	Debit Card
	Anuj	Courier	Compact	Credit Card
	Ajay	Courier	Compact	UPI
Subtotal				
<input type="checkbox"/> - (8)	-	-	-	-
	-	-	-	-
	-	-	-	-

Row Counts

☒ Detail Rows

☒ Subtotals

☒ Grand Total

Dashboards

Urban Color

Our Customers Consultants Retailers others Reports Dashboards

Search...

Star

+

Cloud

?

Settings

12

Profile

Dashboards

Recent

1 item

Search recent dashboards...

New Dashboard

New Folder

Settings

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Consultant Dashboard		Private Dashboards	Anupam Sharma	27/8/2024, 7:34 pm	

Created by Me

Private Dashboards

All Dashboards

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

Urban Color

Our Customers Consultants Retailers others Reports Dashboards

Search...

Star

+

Cloud

?

Settings

12

Profile

Dashboard

Consultant Dashboard

As of 28-Aug-2024, 10:17 am Viewing as Anupam Sharma

Refresh

Edit

Subscribe

Consultant report

Record Count

0 2 4 6 8

Payment type

NetBanking 6

Cash 2

View Report (Consultant report)