

# cosmetics store

# management(project)

by

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## Cosmetics Store Management

### Description :

Cosmetics Store Management in Salesforce is a solution that helps cosmetics stores manage their operations efficiently and effectively. The solution is built on the Salesforce platform, which provides a powerful and scalable platform for managing customer relationships, sales, and inventory. cosmetics stores improve their operational efficiency, enhance customer engagement, and drive growth.

### Summary :

#### 1. **Key Features:Customer Management:**

- **Contacts & Accounts:** Efficiently manage customer details, including contact information, purchase history, and preferences.
- **Customer Segmentation:** Segment customers based on various criteria such as purchase frequency, product preference, and location for targeted marketing.

#### 2. **Product Management:**

- **Product Catalog:** Maintain an up-to-date catalog of cosmetic products with detailed descriptions, pricing, and availability.
- **Inventory Tracking:** Monitor stock levels, set reorder points, and track inventory

turnover to ensure optimal stock levels.

3. **Sales Management:**

- **Order Processing:** Automate the order management process, including order creation, status tracking, and invoicing.
- **Sales Analytics:** Generate reports and dashboards to analyze sales trends, identify top-selling products, and forecast future sales.

4. **Marketing & Promotions:**

- **Campaign Management:** Create and manage marketing campaigns, including email promotions, discounts, and special offers.
- **Customer Engagement:** Use Salesforce tools to engage with customers through personalized offers and targeted marketing.

5. **Customer Service:**

- **Case Management:** Track and resolve customer service issues and complaints efficiently.
- **Knowledge Base:** Provide customers with access to a self-service portal for FAQs, product information, and troubleshooting.

6. **Integration & Automation:**

- **Salesforce Integration:** Integrate with other systems such as ERP or e-commerce platforms to ensure seamless data flow.
- **Workflow Automation:** Automate repetitive tasks and processes to increase operational efficiency and reduce manual errors

**TASKS :**

**1.Creating the Objects :**

To Create an object:

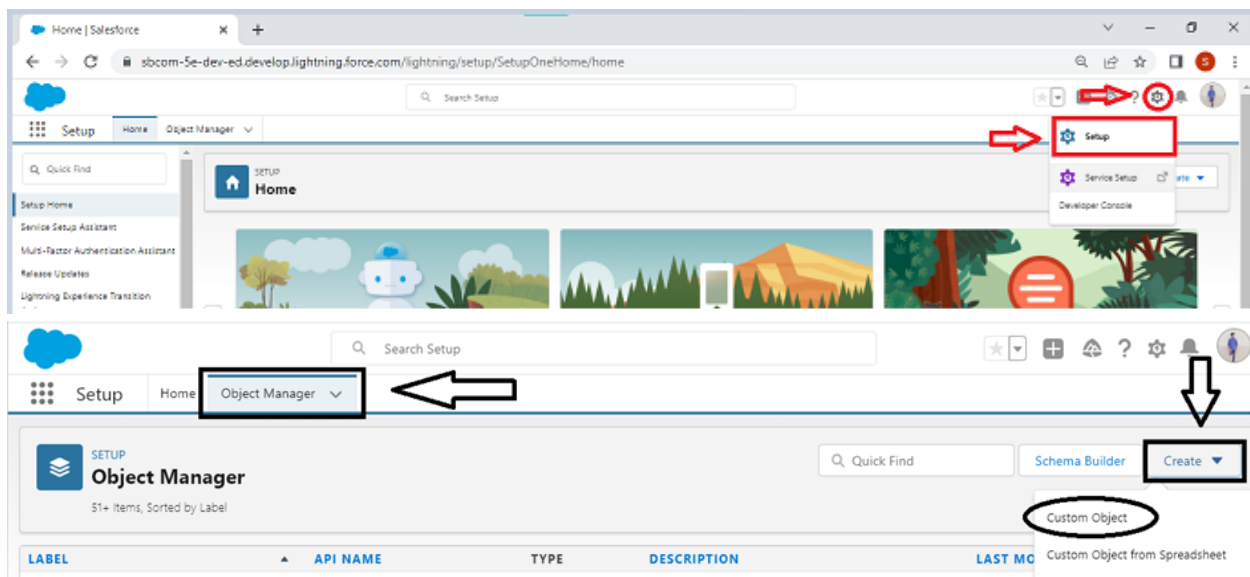
Creation of Objects for Urban Color, For this Urban Color we need to create 3 objects i.e „Our Customers,Consultants,Retailers,others.

The below steps will assist you in creating those objects.

- Click on the gear icon and then select Setup.
- Click on the object manager tab just beside the home tab.
- After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
- Creation of Our Customer Object

On the Custom Object Definition page, create the object as follows:

- Label: Our Customer
- Plural Label: Our Customers
- Record Name: Our Customer
- Check the Allow Reports checkbox
- Check the Allow Search checkbox
- Click Save.
- Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs.
- Under Custom Object Tabs, click New.
- For Object, select Our Customer.
- For Tab Style, select any icon.
- Leave all defaults as is. Click Next, Next, and Save.



We need to create 4 objects named Our customer,Consultant,Retailer,Others.

For creating the another 3 objects,we need t follow the same procedure as mentioned above.

After the completion of object creation task,We'll move on to further steps.

## Task2 : Creating Fields and Relationship :

- An object relationship in Salesforce is a two-way association between two objects. Relationships are created by creating custom relationship fields on an object. This is done so that when users view records, they can also see and **access related data**.

## Fields in Our Customers objects :

Fields in Our Customers 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	Address	Text Area
6	Additional Information	Text Area

## Fields in Consultants objects

Fields in Consultants objects follow below data types:

	2)Compact 3)EyeLiner 4)FacePack Loading... sh	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 objects

Fields in Retailers 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	Loading...	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

#### Fields in Others objects

Fields in Others objects follow below data types:

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

- In the Cosmetic Store Management System built on Salesforce, fields and relationships

In the Cosmetic Store Management System built on Salesforce, fields and relationships

are designed to streamline operations and enhance data management. Key fields

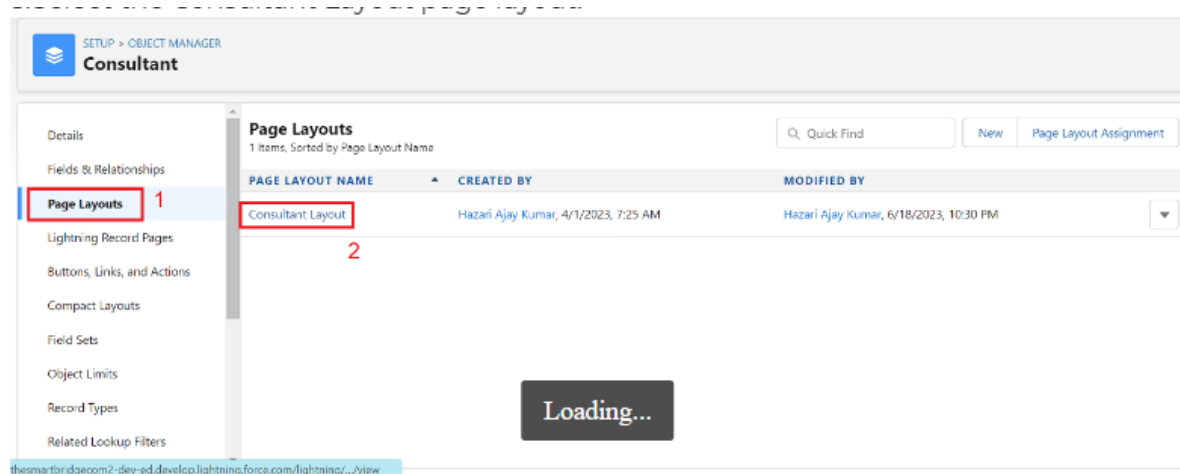
include customer details (e.g., contact information and purchase history), product specifics (e.g., SKU, price, and inventory levels), order details (e.g., order status and shipping info), marketing campaign attributes, and case management elements. Relationships are structured to connect these fields efficiently: customers can have multiple orders and cases, each order can include multiple products, and products are linked to inventory and suppliers.

### 1. **Task 3: Page Layout creation :**

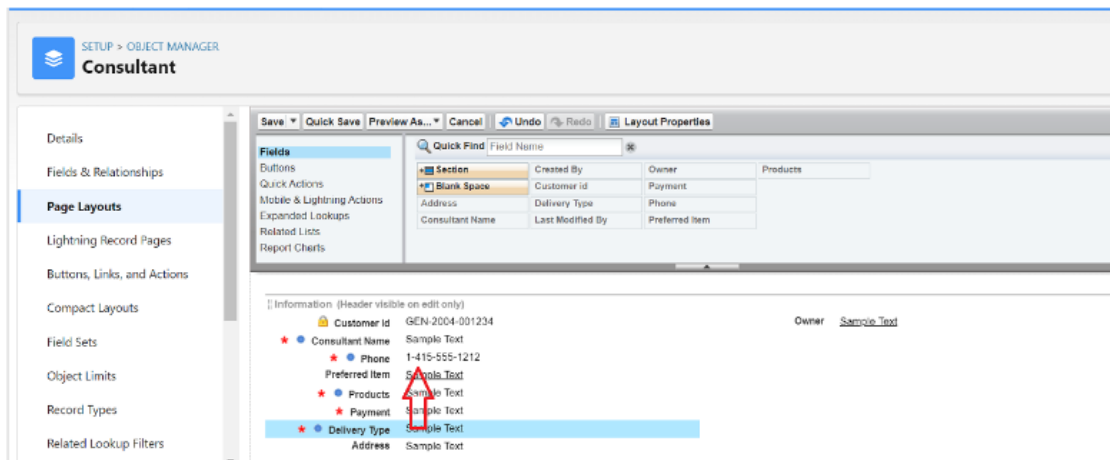
From the Salesforce setup menu, go to "Object Manager" and select the Consultants object.

2. Click on "Page Layouts" in the left sidebar. This will display a list of available page layouts for the selected object.

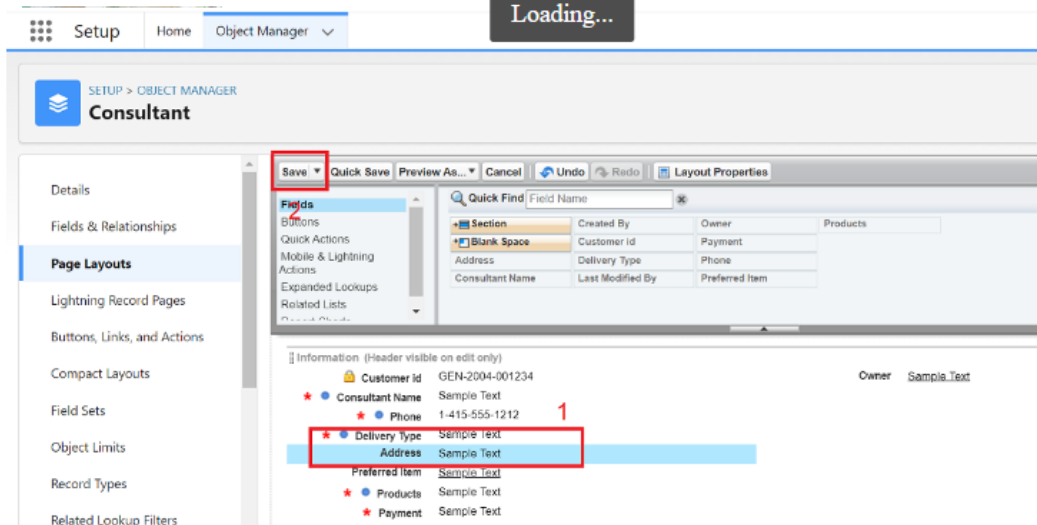
3. Select the Consultant Layout page layout.



4. Click And Drag Delivery type and Address Fields Below Phone field.



5. Click on Save



Creating a page layout in Salesforce involves navigating to the object manager, selecting the relevant object, and either creating a new layout or editing an existing one. You can design the layout by dragging and dropping fields, adding sections and related lists, and including buttons or links as needed. Customize field properties and section settings to suit user needs, then save and assign the layout to specific profiles or record types. Finally, preview and test the layout to ensure it is functional and meets user requirements.

#### ► **Task 4 : Creation of a 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

To create a lightning app page:

1. Go to setup page --> search "app manager" in quick find --> select "app manager" --> click on New lightning App.

sbcom-5e-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

Search Setup

Setup Home Object Manager

app-manager

Apps

App Manager

Lightning Experience App Manager

Clone App (Beta)

Enable App Cloning

25 items • Sorted by App Name • Filtered by All app menus • Table Type

App Name	Developer Name	Description	Last Modified	App Type	WL
1 All Tabs	AllTabSet		04/12/2022, 10:10 am	Classic	
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	04/12/2022, 10:10 am	Classic	✓
3 App Launcher	App Launcher	App Launcher tabs	04/12/2022, 10:10 am	Classic	✓
4 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	04/12/2022, 10:10 am	Lightning	✓
5 Charter Desktop	Charter Desktop	Charter Desktop is an Adobe A/R-based desktop application that lets Charter users stay connecte...	28/12/2022, 4:04 pm	Connected (Managed)	
6 Charter Mobile for BlackBerry	Charter_for_BlackBerry	The Salesforce.com Charter Mobile app lets you access Charter data on the go. Use it to view fee...	28/12/2022, 4:05 pm	Connected (Managed)	
7 College Management System	hadoop	demo app	08/12/2022, 4:18 pm	Lightning	✓
8 Community	Community	Salesforce CRM Communities	04/12/2022, 10:10 am	Classic	✓
9 Content	Content	Salesforce CRM Content	04/12/2022, 10:10 am	Classic	✓
10 Data Manager	Data Manager	Use Data Manager to view limits, monitor usage, and manage recipes.	04/12/2022, 10:10 am	Lightning	✓

2. Fill the app name as Urban Color in app **Loading...** and branding --> Next --> (App option page) keep it as default --> Next --> (Utility Items) keep it as default --> Next.

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 <sup>?</sup>

Name your app...

\* Developer Name <sup>?</sup>

Enter a developer name...

Description <sup>?</sup>

Enter a description...

App Branding

Image <sup>?</sup>

Upload

Primary Color Hex Value

#0070C2

Org Theme Options

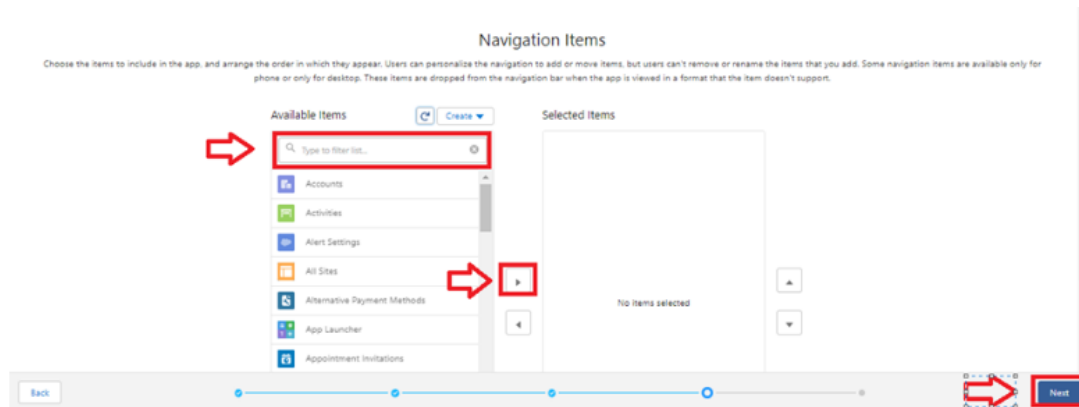
☐ Use the app's image and color instead of the org's custom theme

App Launcher Preview

Next

3. To Add Navigation Items

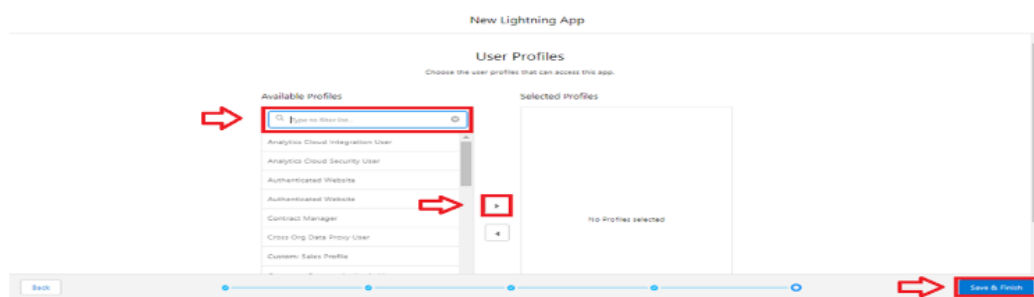




4. Select the items (Our Customers, Consultants, Retailers, Others, Reports, Dashboards) from the search bar and move it using the arrow button --> Next.

5. To Add User Profiles:

Loading...



6. Search profiles (System administrator) in the search bar --> click on the arrow button --> save & finish.

6. Search profiles (System administrator) in the search bar --> click on the arrow button --> save & finish.

### ► **Task 5: Creating Profiles :**

● 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.

Creating a Profiles: Now create a Store Supervisor profile and set its object permissions.

Creating a Profiles:

Now create a Store Supervisor profile and set its object permissions.

- From Setup enter Profiles in the Quick Find box, and select Profiles.
- From the list of profiles, find Standard User.
- Click Clone.
- For Profile Name, enter Store Supervisor.

- Click Save.
- While still on the Store Supervisor profile page, then click Edit.
- Scroll down to Custom Object Permissions and give access for Create,Read,Edit,Delete,View all and modify all for Our Customers,Consultants,Retailers,Others.
- Scroll down to Custom App Settings and give access for Urban Color.

To create a new profile:

- 1.Go to setup --> type profiles in quick find box --> click on profiles --> clone the desired profile (standard user is preferable) --> enter profile name --> save.
2. While still on the profile page, then click Edit

Setup Home Object Manager

Q profil

Users

Profiles

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

Profile

## Store Supervisor

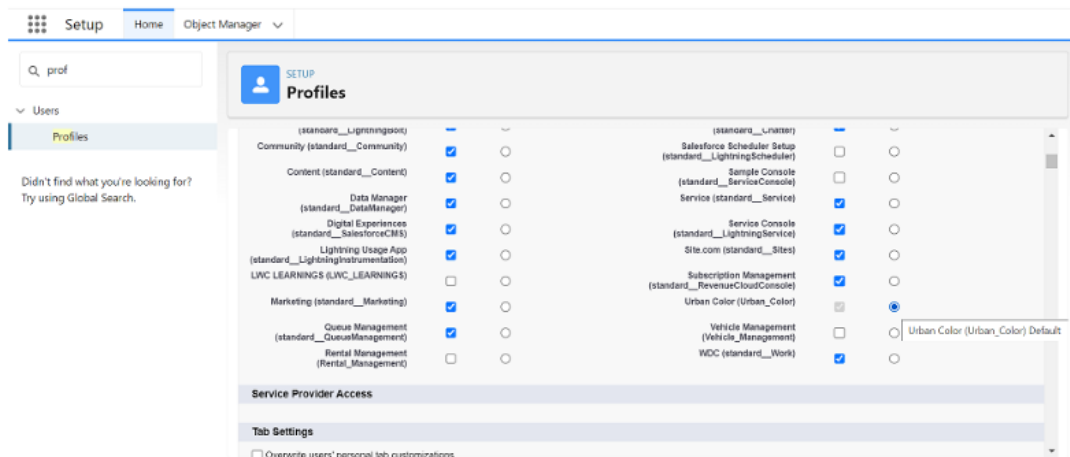
Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing the user's profile.

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

Login IP Ranges [?] | Enabled App [?] | Enabled Visualforce Page Access [?] | Enabled External Data Source Access [?]  
 Enabled External Credential P [?] | Custom Metadata Type Access [?] | Enabled Custom Setting Definitions Acc [?]  
 Profile Presence Status Access [?] | Enabled Custom Permissions [?]

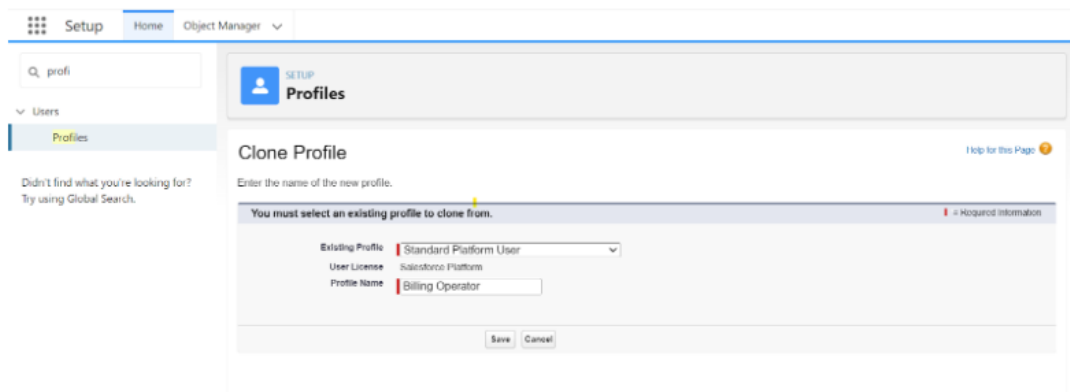
**Profile Detail** Edit Clone Delete View Users

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



3. Click on Save.

4. Similarly Create operator profile ,Clone Salesforce Platform user and give access only for Billing Operator.



5. Click On Save

### **Task 6: Setting up Roles :**

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

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 up the Label as Store Head, Role Name Store\_Head.
  9. Enter a Role name that will be displayed on Reports
  10. Click on Save .
- Similarly create One Roles under Store Head as Billing Operator.

The top screenshot shows the Salesforce Setup interface with the 'Roles' section selected. The 'New Role' form is displayed, showing fields for Label, Role Name, and Role Name as displayed on reports. The 'Role Name' field is highlighted with a 'Loading...' overlay.

The bottom screenshot shows the same interface, but the 'Role Name' field is now populated with 'Billing Operator' and the 'Role Name as displayed on reports' field is populated with 'Store Head'.

## Your Organization's Role Hierarchy

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



- In Salesforce, roles define the hierarchy and access levels for users within an organization. Roles determine the visibility of records and data sharing based on an employee's position and responsibilities. By establishing a role hierarchy, Salesforce allows users to access and manage records owned by users in roles below them in the hierarchy. This ensures that managers can oversee the work of their subordinates while

maintaining data security and privacy. Roles are crucial for configuring access controls, enabling effective data sharing, and facilitating proper reporting within Salesforce.

► **Task 7 : Creation of an User :**

- In Salesforce, a user represents an individual who has access to the Salesforce platform and its functionalities. Each user is assigned a unique username, and their access level and permissions are defined by their profile and role within the organization. Users can perform tasks such as managing records, running reports, and collaborating with team members based on their assigned permissions. Salesforce administrators configure user settings, including login credentials, security settings, and access to various features and data, ensuring that users can efficiently and securely perform their job functions.
1. From Setup, in the Quick Find box, enter Users, and then select Users.
  2. Click New User.
  3. Enter the user's name Amar K and (Your) email address and 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(Store Head)
  5. Select a User Licence 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.

Fill in the fields (first name, last name, alias, email id, username, nick name, role, user licence, profiles) --> save.

**Task 8 : Creating/Modifying Records :**

- Creating or modifying records in Salesforce involves navigating to the relevant object tab, clicking "New" to create a record or "Edit" to update an existing one. For creating records, users fill out the necessary fields and click "Save" to store the new data. For modifications, users locate the record, make the desired changes in the editable fields, and then click "Save" to apply the updates. This process ensures accurate and up-to-date information within the Salesforce system.

**Steps to Create a Record:**

1. **Navigate to the Object Tab:**

- Log in to Salesforce and go to the relevant object tab (e.g., Accounts, Contacts, Opportunities).
- 2. **Click “New”:**
  - On the object’s home page or list view, click the “New” button to initiate the creation of a new record.
- 3. **Enter Record Information:**
  - Complete the fields in the record form with the required and optional data. This may include details like names, addresses, dates, and other relevant information.
- 4. **Save the Record:**
  - Once all necessary information is entered, click “Save” to create and store the new record in Salesforce.

### **Steps to Modify a Record:**

1. **Find the Record:**
  - Locate the record you want to modify by using the object’s list view, search function, or related lists.
2. **Open the Record:**
  - Click on the record’s name to open it and view its details.
3. **Click “Edit”:**
  - In the record’s detail view, click the “Edit” button to enable editing mode.
4. **Update Record Information:**
  - Make the necessary changes to the fields as required. Ensure all required fields are correctly filled out.
5. **Save the Changes:**
  - After making the updates, click “Save” to apply and store the modifications.

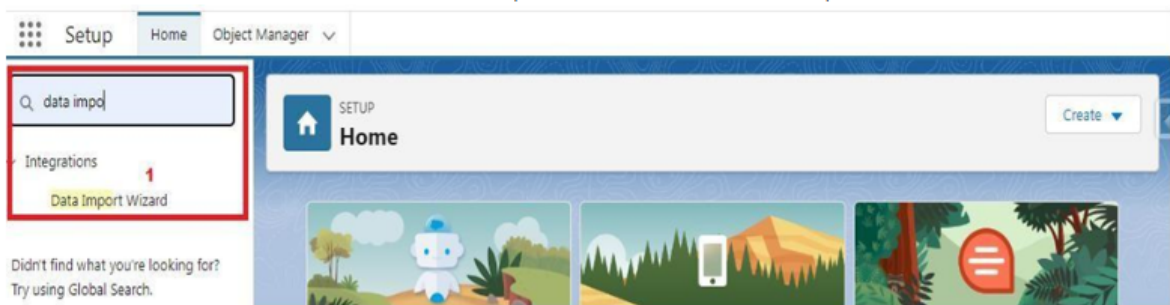
These steps ensure that records are properly created and updated, maintaining accurate and current data in Salesforce.

### **► Task 9: Importing Data :**

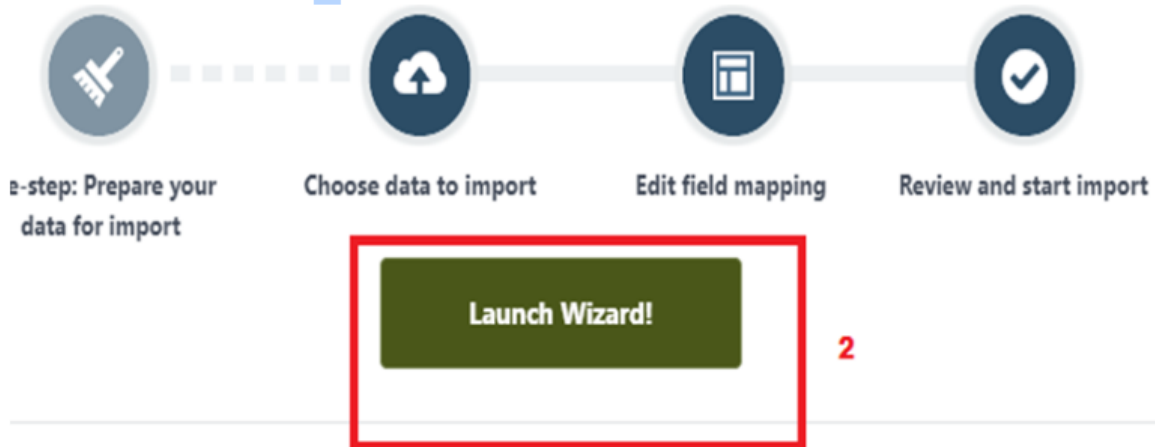
Data Import Wizard—this tool, accessible through the Setup menu, lets you import data in common standard objects, such as contacts, leads, accounts, as well as data in custom objects.

1 From Setup, click the Home tab.

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

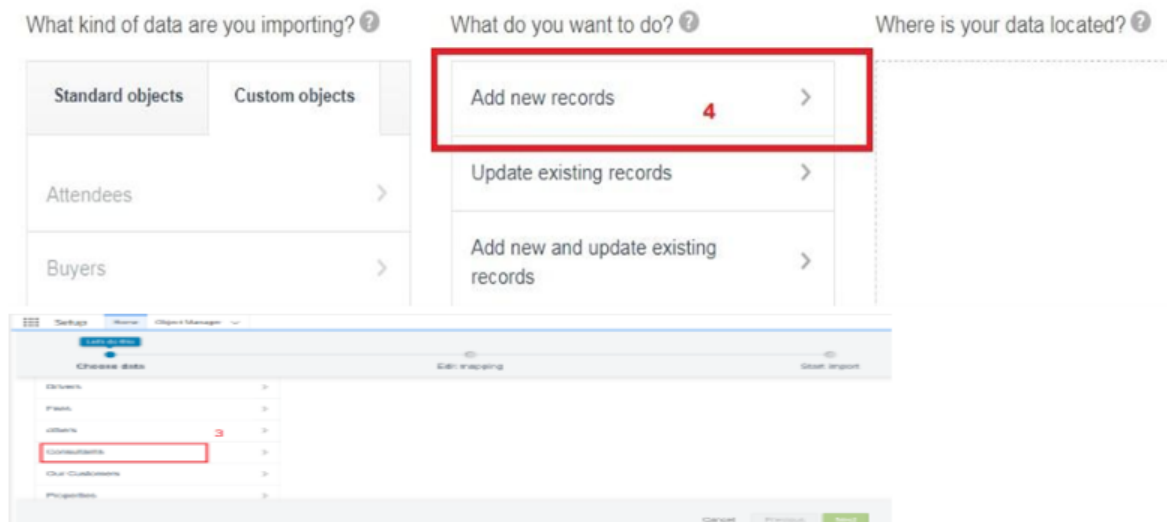


3. Click Launch Wizard!



4. Click the Custom Objects tab and select the Consultant object.  
**Import your Data into Salesforce**

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



5. Select Add new records.

6. Click CSV and choose file Consultant\_CSV which we made earlier. Click Next.

The screenshot shows the 'Choose data' step of a data import wizard. The progress bar at the top indicates the current step. The 'What kind of data are you importing?' section has 'Add new records' selected. The 'What do you want to do?' section has 'Match by: --None--' and 'Which User field in your file designates record owners? --None--'. The 'Where is your data located?' section has a 'Drag CSV file here to upload' area with a 'CSV' file icon highlighted by a red box. The 'Next' button is highlighted by a red box.

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.

The screenshot shows the 'Edit mapping' step of a data import wizard. The progress bar at the top indicates the current step. The 'Edit Field Mapping: Consultants' section shows a table with columns: Edit, Mapped Salesforce Object, CSV Header, Example, Example, and Example. The 'Mapped Salesforce Object' column is highlighted with a red box. The 'CSV Header' column is also highlighted with a red box. The 'Next' button is highlighted with a red box.

Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	Consultant Name	Consultant Name	Dev Raj	Ajith	Babu
Change	Mobile Number	Mobile Number	984638732	784653673	902839439
Change	Delivery Type	Delivery Type	Self Pickup	Courier	Self Pickup
Change	Address	Address		Hyderabad	
Change	Products	Products	Lipstick	Compact	Face Pack
Change	Payment	Payment	Cash	UPI	Credit Card
Change	Email	Email		ajith@gmail.com	Babu34@gmail.com

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



Choose data Edit mapping Start import

### Review & Start Import

Review your import information and click Start Import.

Your selections:

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

Your import will include:

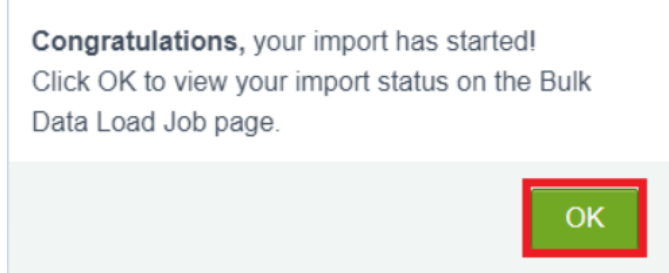
Mapped fields: 7

Your import will not include:

Unmapped fields: 0

Cancel Previous **Start Import**

9. Click OK on the popup.



10. Scroll down the page and verify that your data has been imported under batches

Batches										Records Processed	Records Failed	Retry Count	State Message	Status
View Request	View Result	Batch ID	Start Time	End Time	Total Processing Time (ms)	API Active Processing Time (ms)	App Processing Time (ms)							
<a href="#">View Request</a>	<a href="#">View Result</a>	7512w0000Xqgr	6/19/2023, 11:05 PM	6/19/2023, 11:05 PM	100	52	0			9	0	0		Completed

11. Make sure you have 0 records under the records failed column.

**Note** - Do Field mapping carefully.

11. Make sure you have 0 records under the records failed column.

**Note** - Do Field mapping carefully.

## **Task 10 :Accessing Reports :**

### **Creating Report :**

Click App Launcher

2.Select Urban Color App

3.Click reports tab

4.Click New Report.

5.Click the report type as Consultants Click Start report.

6. Customize your report, in Columns select - ConsultantName, Delivery type, Products, Payment.

7. Click on the drop down option on the payment column and select Bucket this column.

8. Bucket Name as Payment type

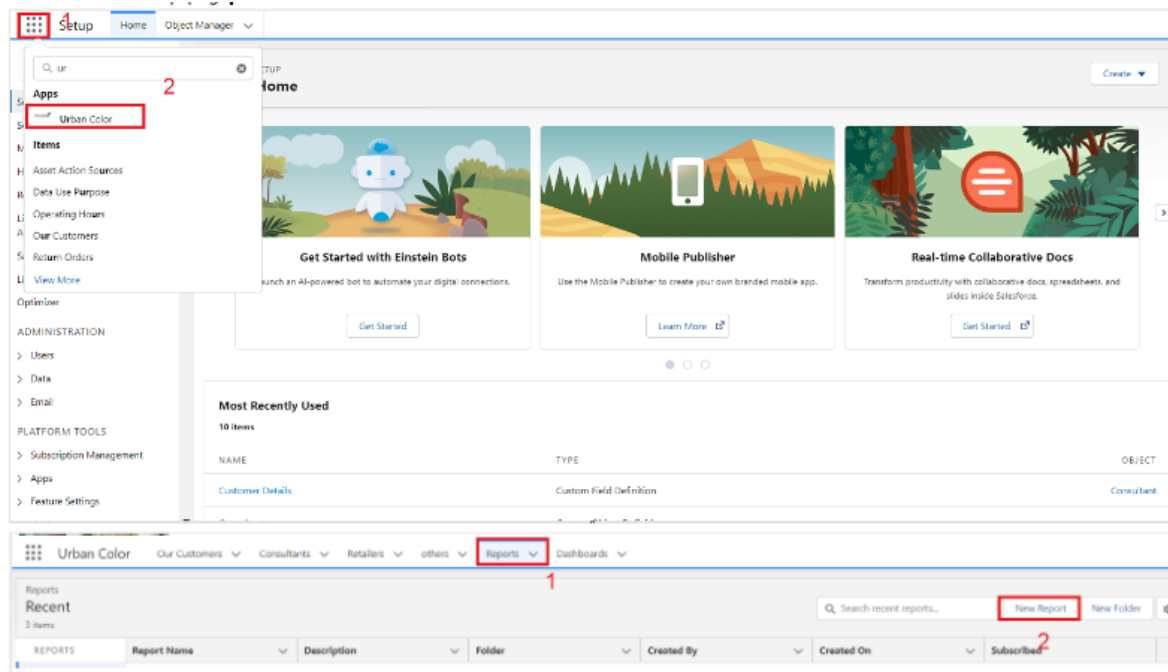
9. Click on Add Bucket and name it as NetBanking

10. Click on Add Bucket and name it as Cash

11. Now Click on All Values and select Credit card, Debit card, Upi and Move to Net Banking.

12. Now Click on All Values again and select Cash and Move to Cash.

13. Click on Apply.



REPORT ▾  
New Consultants Report ✓ Consultants

Fields ▾

Outline ▾ Filters ▾

Groups

GROUP ROWS

Add group...

Columns ▾

Add column...

Consultant: Consultant Name X

Delivery Type X

Products X

Payment X

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

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

Update Preview Automatically

REPORT ▾  
New Consultants Report ✓ Consultants

Fields ▾

Outline ▾ Filters ▾

Groups

GROUP ROWS

Add group...

Columns ▾

Add column...

Consultant: Consultant Name X

Delivery Type X

Products X

Payment X

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

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

Sort According

Sort Descending

Group Columns by this field

Bucket This Column

Show Unique Count

Move Left

Move Right

Remove Column

## Edit Bucket Column

\* Field

Payment X

\* Bucket Name

Payment type

All Values (4)

Search Values

Unbucketed Values (4)

VALUE	BUCKET
<input type="checkbox"/> Credit Card	
<input type="checkbox"/> Debit Card	
<input type="checkbox"/> Upi	
<input type="checkbox"/> Cash	

☐ Bucket remaining values as Other

Add Bucket

Move To ▾

## Edit Bucket Column

\*Field

Payment X

\*Bucket Name

Payment type

All Values (4)

Search Values

Bucket Name

2

Unbucketed Values (4)

1

☐ Bucket remaining values as Other

Add Bucket

Move To

☐ VALUE

BUCKET

☐ Credit Card

☐ Debit Card

☐ Upi

☐ Cash

Cancel

Apply

## Edit Bucket Column

\*Field

Payment X

\*Bucket Name

Payment type

All Values (4)

Search Values

Net Banking (0)

Cash (0)

Unbucketed Values (4)

☐ Bucket remaining values as Other

Add Bucket

Move To

☐ VALUE

BUCKET

☐ Credit Card

☐ Debit Card

☐ Upi

☐ Cash

Cancel

Apply

## Edit Bucket Column

\* Field

Payment X

\* Bucket Name

Payment type

All Values (4)

Net Banking (0)

Cash (0)

Unbucketed Values (4)

☐ Bucket remaining values as Other

Search Values

VALUE

BUCKET

☒ Credit Card

☒ Debit Card

☒ Upi

☐ Cash

Add Bucket

Move To ▼

## Edit Bucket Column

\* Field

Payment X

\* Bucket Name

Payment type

All Values (4)

Net Banking (0)

Cash (0)

Unbucketed Values (4)

☐ Bucket remaining values as Other

Search Values

VALUE

BUCKET

☒ Credit Card

☒ Debit Card

Net Banking

Cash

Unbucketed Values

New Bucket

Add Bucket

Move To ▼

Cancel

Apply

## Edit Bucket Column

\* Field

Payment X

\* Bucket Name

Payment type

All Values (4)

Net Banking (3) ✎ 🗑

Cash (0) ✎ 🗑

Unbucketed Values (1)

☐ Bucket remaining values as Other

Add Bucket

Search Values

VALUE	BUCKET
<input type="checkbox"/> Credit Card	Net Banking
<input type="checkbox"/> Debit Card	Net Banking
<input type="checkbox"/> Upi	Net Banking
<input checked="" type="checkbox"/> Cash	

Move To ▼

Cancel

Apply

## Edit Bucket Column

\* Field

Payment X

\* Bucket Name

Payment type

All Values (4)

Bucket Name 2

Unbucketed Values (4)

☐ Bucket remaining values as Other 1

Add Bucket

Search Values

VALUE	BUCKET
<input type="checkbox"/> Credit Card	
<input type="checkbox"/> Debit Card	
<input type="checkbox"/> Upi	
<input type="checkbox"/> Cash	

Move To ▼

Cancel

Apply

## Edit Bucket Column

\* Field

Payment X

\* Bucket Name

Payment type

All Values (4)

Net Banking (0)

Cash (0)

Unbucketed Values (4)

☐ Bucket remaining values as Other

Search Values

VALUE

BUCKET

☐ Credit Card

☐ Debit Card

☐ Upi

☐ Cash

Add Bucket

Move To ▼

Cancel

Apply

## Edit Bucket Column

\* Field

Payment X

\* Bucket Name

Payment type

All Values (4)

Net Banking (0)

Cash (0)

Unbucketed Values (4)

☐ Bucket remaining values as Other

Search Values

VALUE

BUCKET

☒ Credit Card

☒ Debit Card

☒ Upi

☐ Cash

Add Bucket

Move To ▼

Cancel

Apply

Edit Bucket Column

\* Field

Payment

X

\* Bucket Name

Payment type

All Values (4)

Net Banking (0)

Cash (0)

Unbucketed Values (4)

Search Values

VALUE

BUCKET

Credit Card

Debit Card

Net Banking

Cash

Unbucketed Values

New Bucket

Bucket remaining values as Other

Add Bucket

Move To

Cancel

Apply

Edit Bucket Column

\* Field

Payment

X

\* Bucket Name

Payment type

All Values (4)

Net Banking (3)

Cash (0)

Unbucketed Values (1)

Search Values

VALUE

BUCKET

Credit Card

Debit Card

Upi

Cash

Net Banking

Net Banking

Net Banking

Bucket remaining values as Other

Add Bucket

Move To

Cancel

Apply



### Edit Bucket Column

\* Field

Payment
✕

\* Bucket Name

Payment type

All Values (4)

Net Banking (3)
✎ ✕

✎ ✕ **Cash (1)**

Unbucketed Values (0)

☐ Bucket remaining values as Other

Search Values
🔍

VALUE	BUCKET
<input checked="" type="checkbox"/> Cash	<span>✎ ✕</span> Cash

Add Bucket

Move To ▼

Cancel

Apply

14.In Group Rows Add Payment Type Bucket Field.

15.Click refresh

16.Click Save and Run

17.Give report name – Consultant report

18.Click Save

**REPORT ▼**

New Consultants Report ✎ Consultants

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

**Fields**

**Outline** Filters

**Groups**

GROUP ROWS

Add group...

---

**Columns**

Add column...

Consultant: Consultant Name ✕

Delivery Type ✕

Products ✕

Payment ✕

✎ ✕ Payment type ✕

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

**REPORT** ▾  
New Consultants Report **Consultants**

> **Outline** ▾ **Filters**

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

Payment type ▴ ▾	Consultant: Consultant Name ▾	Delivery Type ▾	Products ▾	Payment ▾
Net Banking (7)	Ajith	Courier	Compact	Upi
	Babu	Self Pickup	Face Pack	Credit Card
	Chitra	Courier	Eye Liner	Debit Card
	Swathi	Courier	Nail Polish	Upi
	Prasad	Self Pickup	Eye Liner	Upi
	Ajay Kumar	Courier	Lip Balm	Debit Card
	Sandeep	Courier	Eye Liner	Upi
<b>Subtotal</b>				
Cash (2)	Dev Raj	Self Pickup	Lipstick	Cash
	Shankar	Self Pickup	Face Pack	Cash
<b>Subtotal</b>				
<b>Total (9)</b>				

**Fields**

**Groups**

GROUP ROWS

Add group...

Payment type X

GROUP COLUMNS

Add group...

**Columns** ▾

Add column...

Consultant: Consultant Name X

Delivery Type X

Products X

Payment X

### Save Report

**Report Name** 1

Consultants Report

Report Unique Name ?

Consultants\_Report\_hvb

Report Description

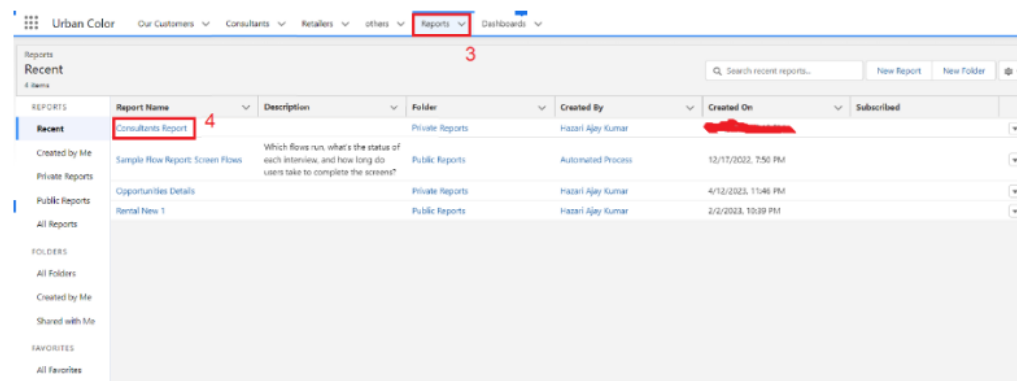
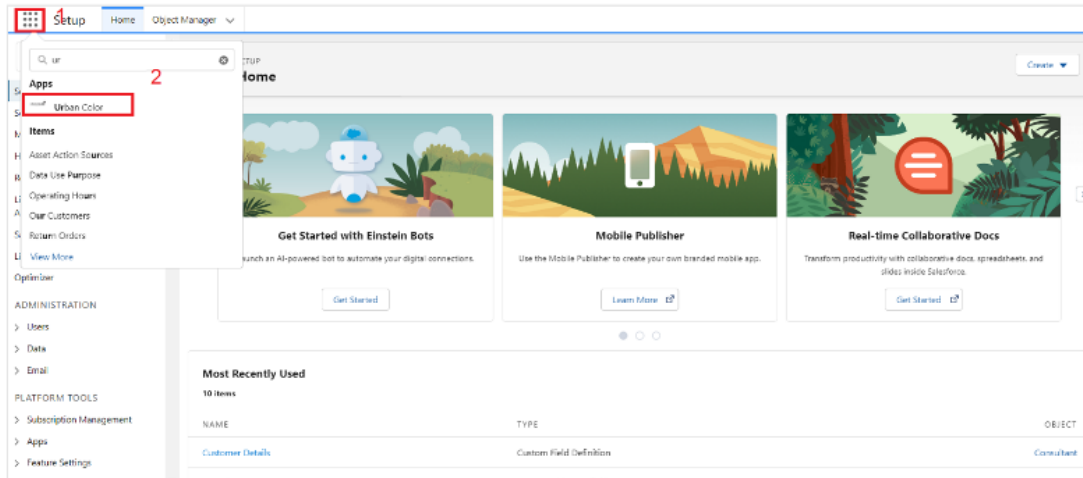
**Folder** 2

Private Reports Select Folder

Cancel **Save** 3

### View Reports :

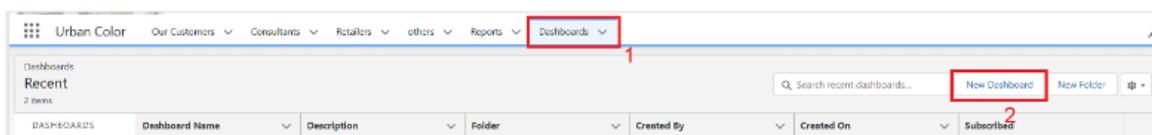
1. Click on App Launcher on the left side of the screen.
2. Search Urban Color App & click on it.
3. Click on Reports Tab.
4. Click on Urban Color Report and see records



### **Task 11 : Working with dashboards :**

#### **Create Dashboard :**

1. Click on the Dashboards tab from the Urban Color application.
2. Click on the new dashboard.
3. Give name- Consultant Dashboard
4. Click create
5. Give your dashboard a name and click on +component
6. Select the Consultants Report which you created.
7. For the data visualization select any of the chart, table etc. as per your choice/requirement.
8. Click add.
9. Click save.



## New Dashboard

\* Name

3

Consultant Dashboard

Description

Folder

Private Dashboards

Select Folder

4

Cancel

Create

### Select Report

#### Reports

##### Recent

Created by Me

Private Reports

Public Reports

All Reports

##### Folders

Created by Me

Shared with Me

All Folders

Select Report

Q, Search Reports and Folders

Reports and Folders

6

Consultants Report  
Hazel Ajay Kumar - Private Reports

Sample How Report: Screen How  
Automated Process - Dec 17, 2022, 7:29 PM - Public Reports

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

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

Cancel

Select

## Add Component

Report: Consultants Report

☐ Use chart settings from report

Display As: [Chart icons]

Y-Axis: Payment type

X-Axis: Record Count

Preview: Consultants Report

Record Count: 0, 2, 4, 6, 8

Payment type: Net Banking (7), Cash (2)

View Report (Consultants Report)

Buttons: Cancel, Add

Urban Color | Our Customers | Consultants | Retailers | others | Reports | Dashboards

Consultant Dashboard

Buttons: + Component, + Filter, Save, Done

Consultants Report: [Bar chart showing Net Banking (7) and Cash (2)]

View Report (Consultants Report)

## View DashBoard :

1. Click on App Launcher on the left side of the screen.
2. Search Candidate Internal Result Card & click on it.
3. Click on Dashboard Tab.
4. Click on Candidate Internal Result Card see graph view of records

Setup

Home

Object Manager

Q, or

2

Urban Color

Apps

Items

Asset Action Sources

Data Use Purpose

Operating Hours

Our Customers

Return Orders

View More

Optimizer

ADMINISTRATION

Users

Data

Email

PLATFORM TOOLS

Subscription Management

Apps

Feature Settings

home

Get Started with Einstein Bots

Mobile Publisher

Real-time Collaborative Docs

Most Recently Used

10 items

NAME

TYPE

OBJECT

Customer Details

Custom Field Definition

Consultant

Urban Color

Our Customers

Consultants

Retailers

others

Reports

3

Dashboards

Dashboards

Recent

3 items

Search recent dashboards...

New Dashboard

New Folder

DASHBOARDS

Dashboard Name

Description

Folder

Created By

Created On

Subscribed

Recent

4

Consultant Dashboard

Private Dashboards

Hazal Ajay Kumar

6/26/2023, 10:46 PM

Created by Me

Opportunities Details

Private Dashboards

Hazal Ajay Kumar

4/12/2023, 11:57 PM

Private Dashboards

Opportunity details

Private Dashboards

Hazal Ajay Kumar

4/12/2023, 11:49 PM

All Dashboards

FOLDERS

**THANK YOU**