

# URBAN COLOR MANAGEMENT SYSTEM

Empowering Colorful Cities

Developed by:

**YARRAGUNTA BHAVANA**

**214g1a0513@gmail.com**

## 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.

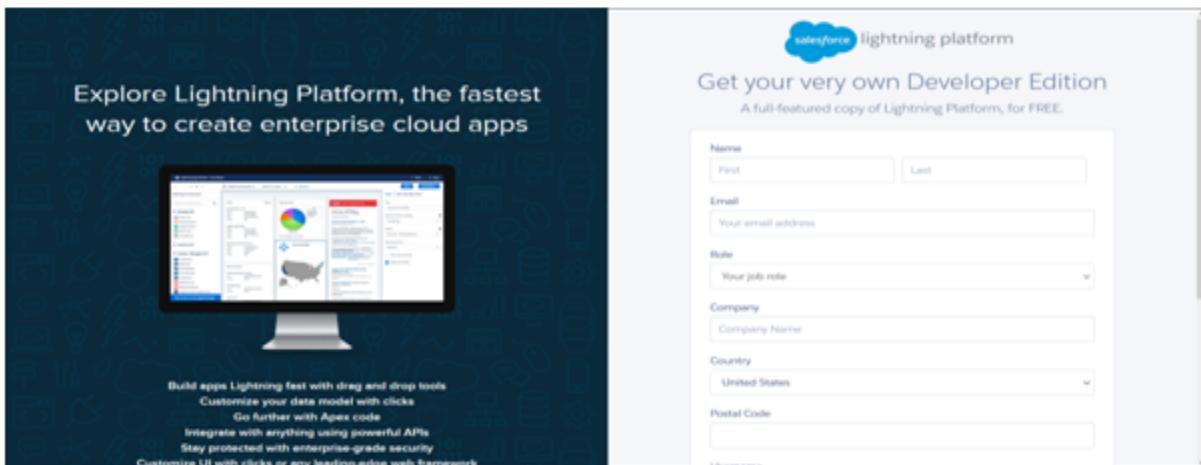
## **INDEX PAGE**

<b>TOPICS</b>	<b>PAGES</b>
1.Creation salesforce org	01-02
2.Object	03-08
3.Feilds And RelationalShip	09-11
4.Page Layouts	12-13
5.The Lightning App	14-16
6.Profile	17-20
7.Setup Roles	21-22
8.Users	23-25
9.User Adaption	26-29
10.Import Data	30-33
11.What Are Reports ?	34-41
12.Dashboards	42-45

# 1. Creating a Developer Account in Salesforce

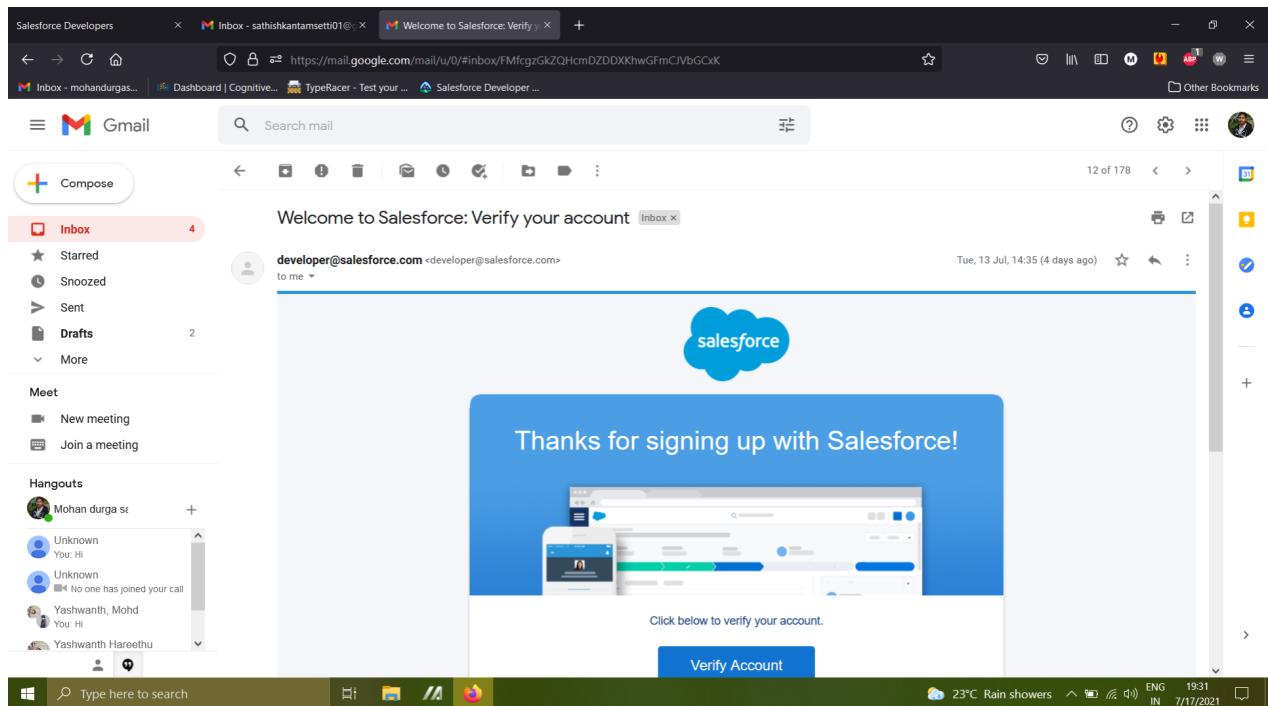
## Step 1: Sign Up for a Developer Org

1. Go to [developers.salesforce.com/signup](https://developers.salesforce.com/signup).
2. Click on "Sign Up."
3. Fill out the Sign-Up Form with the following details:
  - First Name & Last Name
  - Email
  - Role: Developer
  - Company: [Your College Name]
  - Country: India
  - Postal Code: [Your Pin Code]
  - Username: Create a username using a combination of your name and company.  
This does not need to be a valid email; you can format it as `username@organization.com`.
4. Click on "Sign Up" after filling in all the details.



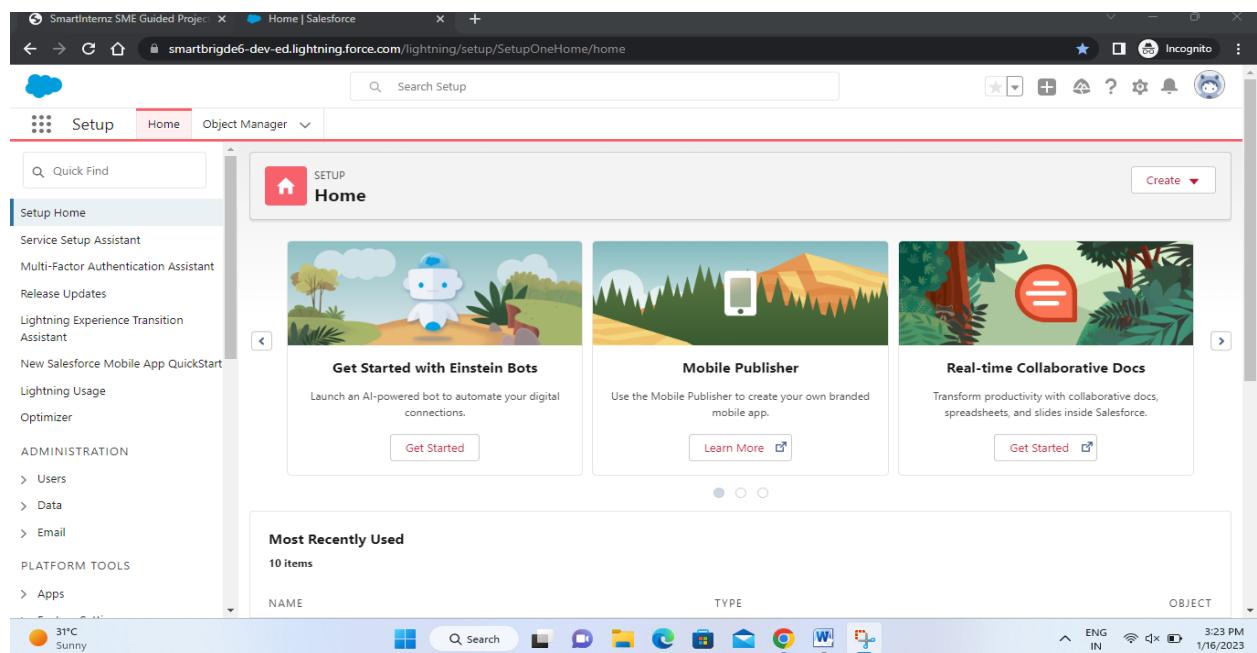
## Step 2: Account Activation

1. Go to your email inbox that you used for signing up.
2. Find the verification email from Salesforce and click on the "Verify Account" link to activate your account.
  - Note: The email might take 5-10 minutes to arrive.



## Step 3: Login to Your Salesforce Account

1. Go to [login.salesforce.com](https://login.salesforce.com).
2. Enter your **username** and **password** created during the sign-up process.
3. **Login** to access your Salesforce Developer account.  
■ You will see the home page after logging in.



## 2. Salesforce Objects

Salesforce objects are database tables that allow you to store data specific to an organization.

Objects in Salesforce are of two types:

1. **Standard Objects:** These are the pre-built objects provided by Salesforce, such as Users, Contracts, Reports, Dashboards, and more. Standard objects form the foundation of Salesforce's data structure and cover common business scenarios.
2. **Custom Objects:** These are user-defined objects created to store data that is unique to your organization's needs. In the context of the Urban Color Management System, examples of custom objects include **Our Customers, Consultants, Retailers, and Others.**

### 2.1. Creating Objects for Urban Color Management

In the Urban Color Management System, we need to create three custom objects: **Our Customers, Consultants, Retailers, and Others.** The following steps will guide you through the process of creating these objects in Salesforce.

#### Step 1: Access Setup

1. Click on the gear icon in the upper-right corner of Salesforce.
2. Select "Setup" from the dropdown menu.

#### Step 2: Open Object Manager

1. Click on the "Object Manager" tab located next to the Home tab.

#### Step 3: Create a Custom Object

1. On the **Object Manager** page, look to the right side of the screen.
2. Click on the "Create" dropdown and select **Custom Object**.

#### Step 4: Create "Our Customer" Object

1. On the **Custom Object Definition** page, enter the following details:
  - **Label:** Our Customer

- **Plural Label:** Our Customers
  - **Record Name:** Our Customer
2. **Check the following boxes:**
    - Allow Reports
    - Allow Search
  3. **Click "Save"** to create the object.

## Step 5: Create a Custom Tab for "Our Customer"

1. **Click the "Home" tab** and enter "Tabs" in the Quick Find search bar.
2. **Select "Tabs"** from the search results.
3. Under **Custom Object Tabs**, click **New**.
4. For **Object**, select **Our Customer**.
5. For **Tab Style**, select any icon that represents your object.
6. Leave all other settings as defaults and click **Next**.
7. **Click "Next"** again, then **Save**.

## 2.2.Creating the Consultants Object

The following steps will guide you through the process of creating the **Consultants** object in Salesforce.

### Step 1: Access Setup

1. **Click on the gear icon** in the upper-right corner of Salesforce.
2. **Select "Setup"** from the dropdown menu.

### Step 2: Open Object Manager

1. **Click on the "Object Manager"** tab located next to the Home tab.

### Step 3: Create a Custom Object

1. On the **Object Manager** page, look to the right side of the screen.
2. **Click on the "Create"** dropdown and select **Custom Object**.

## **Step 4: Create "Consultants" Object**

1. On the **Custom Object Definition** page, enter the following details:
  - **Label:** Consultant
  - **Plural Label:** Consultants
  - **Record Name:** Consultant
2. **Check the following boxes:**
  - **Allow Reports**
  - **Allow Search**
3. **Click "Save"** to create the object.

## **Step 5: Create a Custom Tab for "Consultants"**

1. **Click the "Home" tab** and enter "Tabs" in the Quick Find search bar.
2. **Select "Tabs"** from the search results.
3. Under **Custom Object Tabs**, click **New**.
4. For **Object**, select **Consultants**.
5. For **Tab Style**, select any icon that represents your object.
6. Leave all other settings as defaults and click **Next**.
7. **Click "Next"** again, then **Save**.

## **2.3.Creating the Retailers Object**

The following steps will guide you through the process of creating the **Retailers** object in Salesforce.

### **Step 1: Access Setup**

1. Click on the gear icon in the upper-right corner of Salesforce.
2. Select "Setup" from the dropdown menu.

### **Step 2: Open Object Manager**

1. Click on the "Object Manager" tab located next to the Home tab.

### **Step 3: Create a Custom Object**

1. On the **Object Manager** page, look to the right side of the screen.
2. Click on the "Create" dropdown and select **Custom Object**.

### **Step 4: Create "Retailers" Object**

1. On the **Custom Object Definition** page, enter the following details:
  - **Label:** Retailer
  - **Plural Label:** Retailers
  - **Record Name:** Retailer
2. Check the following boxes:
  - **Allow Reports**
  - **Allow Search**
3. Click "Save" to create the object.

### **Step 5: Create a Custom Tab for "Retailers"**

1. Click the "Home" tab and enter "Tabs" in the Quick Find search bar.
2. Select "Tabs" from the search results.
3. Under **Custom Object Tabs**, click **New**.
4. For **Object**, select **Retailers**.

5. For **Tab Style**, select any icon that represents your object.
6. Leave all other settings as defaults and click **Next**.
7. Click "Next" again, then **Save**.

## 2.4.Creating the Others Object

The following steps will guide you through the process of creating the **Others** object in Salesforce.

### Step 1: Access Setup

1. Click on the gear icon in the upper-right corner of Salesforce.
2. Select "Setup" from the dropdown menu.

### Step 2: Open Object Manager

1. Click on the "Object Manager" tab located next to the Home tab.

### Step 3: Create a Custom Object

1. On the **Object Manager** page, look to the right side of the screen.
2. Click on the "Create" dropdown and select **Custom Object**.

### Step 4: Create "Others" Object

1. On the **Custom Object Definition** page, enter the following details:
  - **Label:** Other
  - **Plural Label:** Others
  - **Record Name:** Other
2. Check the following boxes:
  - **Allow Reports**
  - **Allow Search**
3. Click "Save" to create the object.

## **Step 5: Create a Custom Tab for "Others"**

1. Click the **"Home" tab** and enter "Tabs" in the Quick Find search bar.
2. Select **"Tabs"** from the search results.
3. Under **Custom Object Tabs**, click **New**.
4. For **Object**, select **Others**.
5. For **Tab Style**, select any icon that represents your object.
6. Leave all other settings as defaults and click **Next**.
7. Click **"Next"** again, then **Save**.

### **3. Fields and Relationships**

In Salesforce, an object relationship is a two-way association between two objects, allowing users to connect and interact with related data across different objects. This relationship is established by creating custom relationship fields on an object. These relationship fields enable users to view records and seamlessly access related information, providing a comprehensive view of data across the Salesforce environment.

By using relationships, Salesforce ensures that all related data is interconnected, making it easier for users to navigate between related records, improving data consistency, and enhancing the overall user experience.

#### **3.1. Fields in the "Our Customers" Object**

The following fields are defined in the "Our Customers" object, each with a specific data type:

S No	Field Label	Data Type
1	Customer id	Auto Number
2	Customer Name	Text
3	Mobile Number	Phone
4	Email id	Email
5	Address	Text Area
6	Additional Information	Text Area

#### **3.2. Fields in Consultants objects**

The following fields are defined in the "Consultants" object, each with a specific data 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	Lookup(Our Customers Object)
9	Address	Text Long

### 3.3.Fields in Retailers objects

The following fields are defined in the "Retailers" object, each with a specific data type:

S No	Field Label	Data Type
1	Customer id	Auto Number
2	Customer Name	Text
3	Mobile Number	Phone
4	Email id	Email
5	Delivery Type 1)Self Pickup 2)Courier	Picklist
6	Products 1)Lipstick 2)Compact 3)EyeLiner 4)FacePack 5)Lip Balm	Multi-Picklist
	6)Nail Polish	
7	Payment 1)Debit Card 2)Credit Card 3)UPI 4)Cash	Picklist
8	Customer Details	Master-Detail Relationship (Our Customers Object)

### 3.4.Fields in Others objects

The following fields are defined in the "Others" object, each with a specific data type:

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

# 4. Page Layouts

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

## Page Layout Creation

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

The screenshot shows the Salesforce Object Manager interface for the 'Consultant' object. The left sidebar has a 'Page Layouts' item highlighted with a red box and the number '1'. The main area displays a table titled 'Page Layouts' with one item: 'Consultant Layout'. The table has columns for 'PAGE LAYOUT NAME', 'CREATED BY', and 'MODIFIED BY'. The 'Consultant Layout' row shows 'Hazari Ajay Kumar' as the creator and modifier, with the creation date '4/1/2023, 7:25 AM' and the modification date '6/18/2023, 10:30 PM'. A red box highlights the 'Consultant Layout' name in the table, and the number '2' is placed below it. The URL at the bottom of the page is 'thesmartbridgecom2-dev-ed.lightning.force.com/lightning...view'.

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Consultant Layout	Hazari Ajay Kumar, 4/1/2023, 7:25 AM	Hazari Ajay Kumar, 6/18/2023, 10:30 PM

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

SETUP > OBJECT MANAGER

### Consultant

Details

Fields & Relationships

**Page Layouts**

- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters

Save ▾ Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields

Quick Find Field Name

Section	Created By	Owner	Products
Blank Space	Customer id	Payment	
Address	Delivery Type	Phone	
Consultant Name	Last Modified By	Preferred Item	

Information (Header visible on edit only)

Customer id	GEN-2004-001234	Owner	Sample Text
Consultant Name	Sample Text		
Phone	1-415-555-1212		
Preferred Item	Sample Text		
Products	Sample Text		
Payment	Sample Text		
Delivery Type	Sample Text		
Address	Sample Text		

## 5. Click on Save.

Setup Home Object Manager

SETUP > OBJECT MANAGER

### Consultant

Details

Fields & Relationships

**Page Layouts**

- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters

Save ▾ Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields

Quick Find Field Name

Section	Created By	Owner	Products
Blank Space	Customer id	Payment	
Address	Delivery Type	Phone	
Consultant Name	Last Modified By	Preferred Item	

Information (Header visible on edit only)

Customer id	GEN-2004-001234	Owner	Sample Text
Consultant Name	Sample Text		
Phone	1-415-555-1212		
Preferred Item	Sample Text		
Products	Sample Text		
Payment	Sample Text		
Delivery Type	Sample Text		
Address	Sample Text		

1

# 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. Members of your org can work more efficiently by easily switching between apps.

## 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**.

The screenshot shows the Salesforce App Manager interface. At the top, there are search and filter fields, and a navigation bar with 'Setup' and 'Home'. Below the navigation bar, there are two red boxes: one around the search bar and another around the 'Clone Apps(Beta)' section. In the 'Clone Apps(Beta)' section, there is a note about cloning existing apps, a toggle switch for 'Enable App Cloning' (set to 'Disabled'), and two buttons: 'New Lightning App' and 'New Connected App'. A red arrow points to the 'New Lightning App' button. Below this section is a table titled '35 items > Sorted by App Name > Filtered by All appurrences > Select Type'. The table has columns for 'App Name', 'Developer Name', 'Description', 'Last Modified', 'App Type', and 'V...'. The data includes various standard and custom apps like 'All Sites', 'Analytics Studio', 'App Launcher', etc.

## To Add Navigation Items:

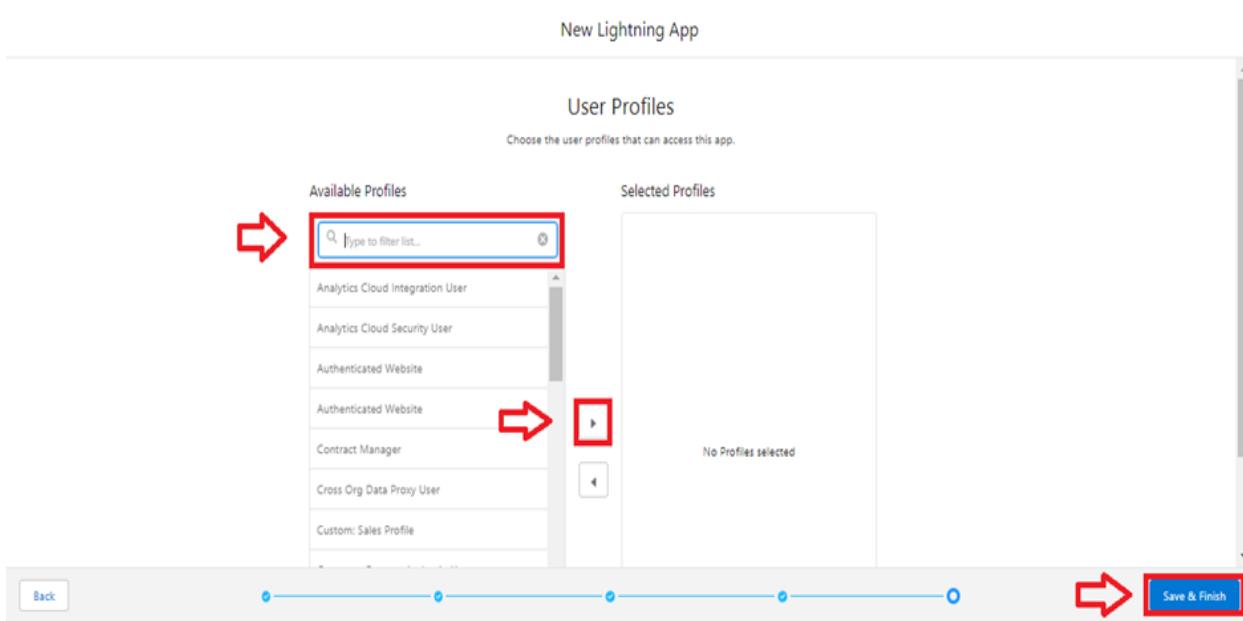
1. Select the items (**Our Customers, Consultants, Retailers, Others, Reports, Dashboards**) from the search bar and move them using the arrow button.
2. Click **Next**.

The screenshot shows the 'New Lightning App' configuration page. At the top, it says 'New Lightning App'. Below that is a section titled 'Navigation Items' with the sub-instruction: 'Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.' There are two main sections: 'Available Items' and 'Selected Items'. The 'Available Items' section contains a search bar ('Type to filter list...') and a list of items: Accounts, Activities, Alert Settings, All Sites, Alternative Payment Methods, App Launcher, and Appointment Invitations. A red arrow points to the search bar. To the right of this list is a right-pointing arrow button. The 'Selected Items' section is currently empty and has a note: 'No items selected'. At the bottom of the page is a progress bar with 'Back' and 'Next' buttons. A red arrow points to the 'Next' button.

## To Add User Profiles:

1. Search for **profiles (System Administrator)** in the search bar.

2. Click on the arrow button to add the profile.
3. Click **Save & Finish**.



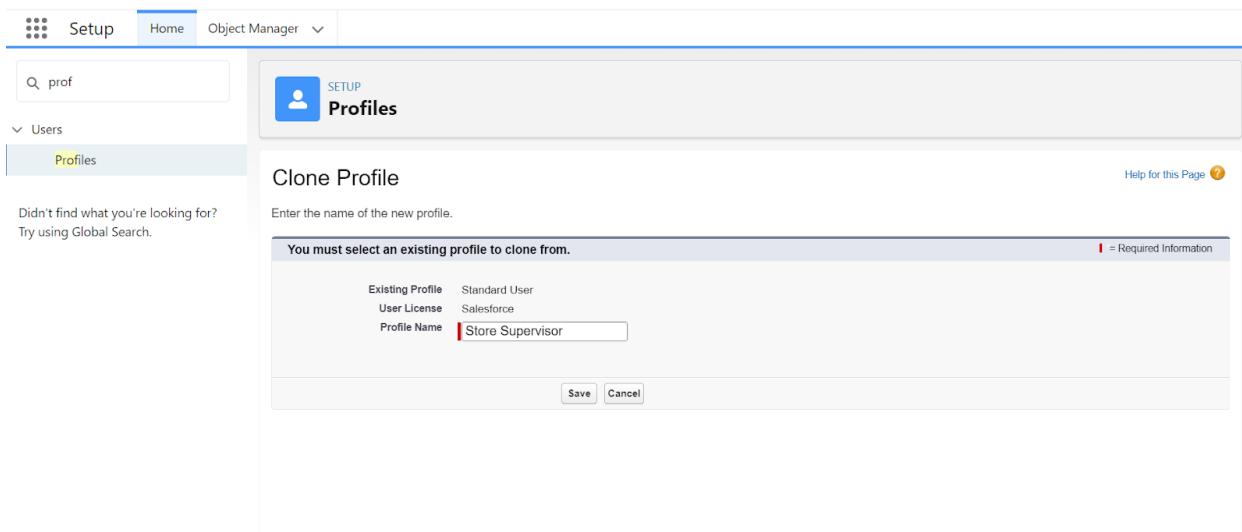
# 6.Profile

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.

The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The profile 'Store Supervisor' is displayed, which includes a list of permissions and settings. The 'Profile Detail' section shows the profile name, user license (Salesforce), and a checked 'Custom Profile' checkbox. The 'Edit', 'Clone', 'Delete', and 'View Users' buttons are also visible.

This screenshot shows a list of various profiles in the Salesforce Setup interface under the 'Profiles' tab. The profiles listed include standard profiles like 'Community', 'Content', 'Data Manager', and 'Marketing', as well as more specific profiles like 'Salesforce Scheduler Setup', 'Sample Console', and 'Service'. The 'Urban Color' profile is also present in the list.

**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**.

Object	Permission 1	Permission 2	Permission 3	Permission 4	Permission 5	Permission 6	Permission 7
Consultants	<input checked="" type="checkbox"/>						
Retailers	<input checked="" type="checkbox"/>						

### Similarly, Create an Operator Profile:

1. Clone the **Salesforce Platform** user profile.
2. Give access only for **Billing Operator**.

**SETUP**

**Profiles**

Profile Edit  
**Billing Operator**

Set the permissions and page layouts for this profile.

**Profile Edit**

Name: Billing Operator

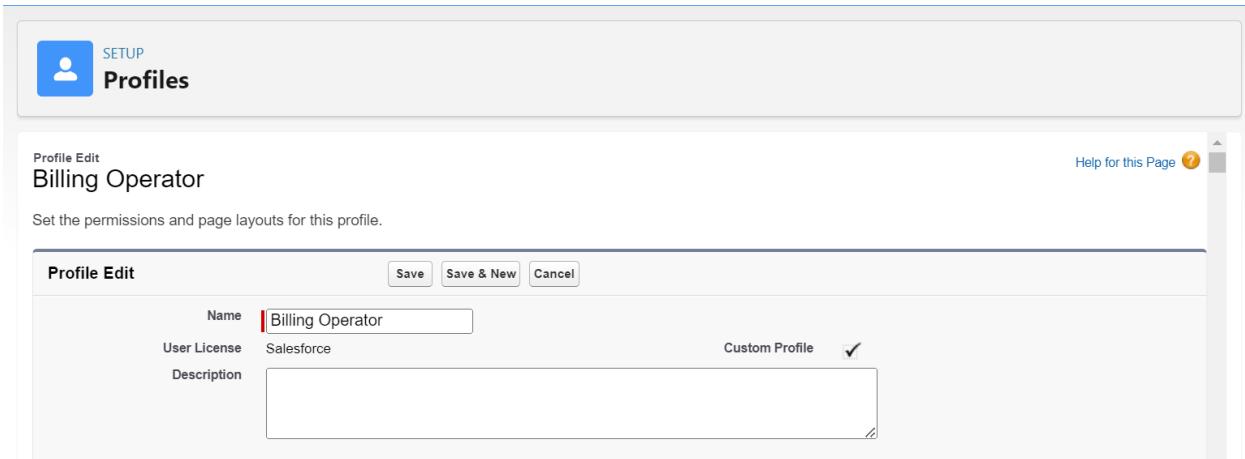
User License: Salesforce

Description:

Custom Profile:

Save | Save & New | Cancel

Help for this Page ?



**SETUP**

**Profiles**

Allow OAuth for employees  [i](#)

**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

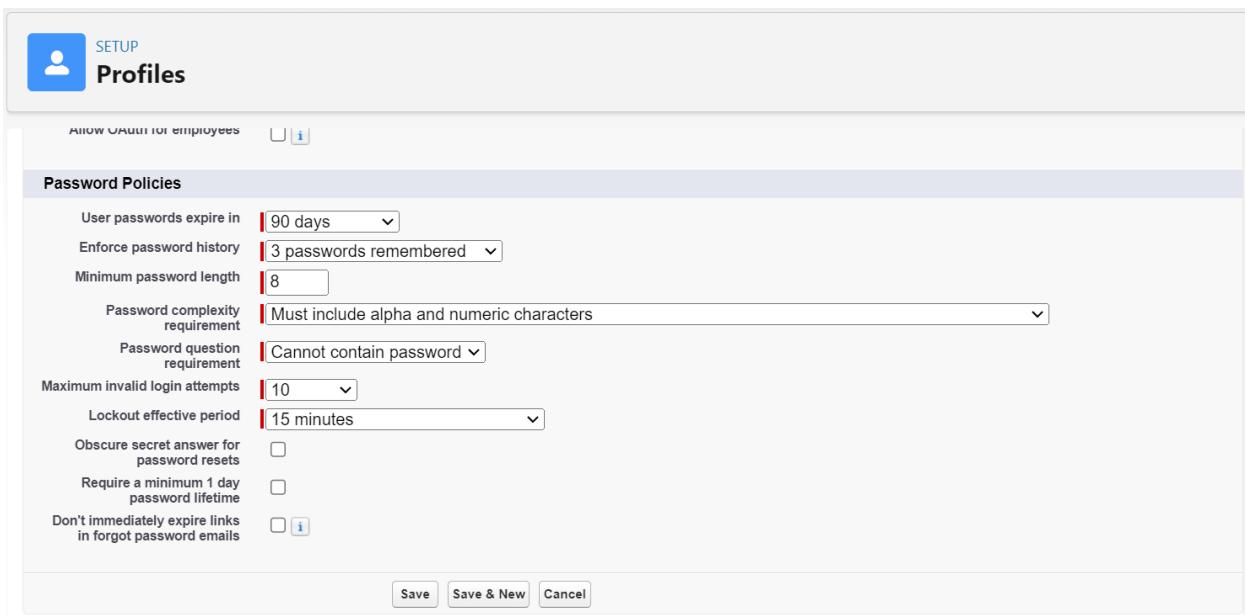
Lockout effective period: 15 minutes

Obscure secret answer for password resets

Require a minimum 1 day password lifetime

Don't immediately expire links in forgot password emails  [i](#)

Save | Save & New | Cancel



**3. Click on Save.**

# 7. Setup Roles

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

## Setup Roles

1. Click on the **Gear Icon**.
2. Click **Setup**.
3. In the **Quick Find** box, enter **Roles**.
4. Click **Roles**.
5. Click on **Set Up Roles**.
6. Click **Expand All**.
7. Under the **CEO**, click on **Add Role**.
8. Fill in the **Label** as **Store Head**, and the **Role Name** as **Store\_Head**.
9. Enter a **Role Name** that will be displayed on reports.
10. Click on **Save**.

Similarly, create one role under Store Head as Billing Operator.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar contains the text 'roles'. On the left, a sidebar menu is open under 'Users', showing 'Roles' which is selected. Other options include 'Feature Settings', 'Sales' (with 'Contact Roles on Contracts' and 'Contact Roles on Opportunities'), 'Service' (with 'Case Teams' and 'Case Team Roles'), and 'Cases' (with 'Contact Roles on Cases'). The main content area is titled 'Role Edit' and 'New Role'. It contains fields for 'Label' (set to 'Store Head'), 'Role Name' (set to 'Store\_Head'), 'This role reports to' (set to 'thesmartbridge.com'), and 'Role Name as displayed on reports' (empty). At the bottom are 'Save', 'Save & New', and 'Cancel' buttons.

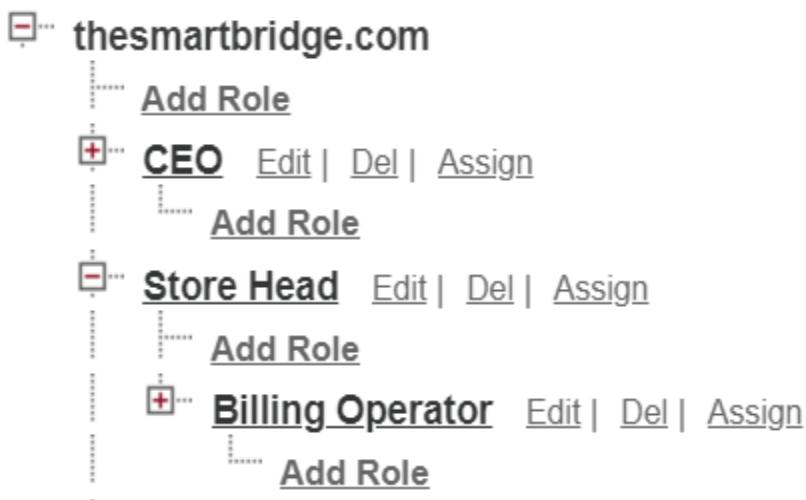
The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup' (selected), 'Home', and 'Object Manager'. A search bar on the left contains the text 'roles'. The main content area is titled 'SETUP Roles' and shows a 'New Role' form. The form fields are as follows:

- Label: Billing Operator
- Role Name: Billing\_Operator
- This role reports to: Store Head
- Role Name as displayed on reports: (empty)

Buttons at the bottom of the form include 'Save', 'Save & New', and 'Cancel'. On the left sidebar, under 'Sales', there are links for 'Contact Roles on Contracts', 'Contact Roles on Opportunities', and 'Case Team Roles'. Under 'Service', there is a link for 'Case Teams'. A message at the bottom left says ' Didn't find what you're looking for? Try using Global Search.'

## Your Organization's Role Hierarchy

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



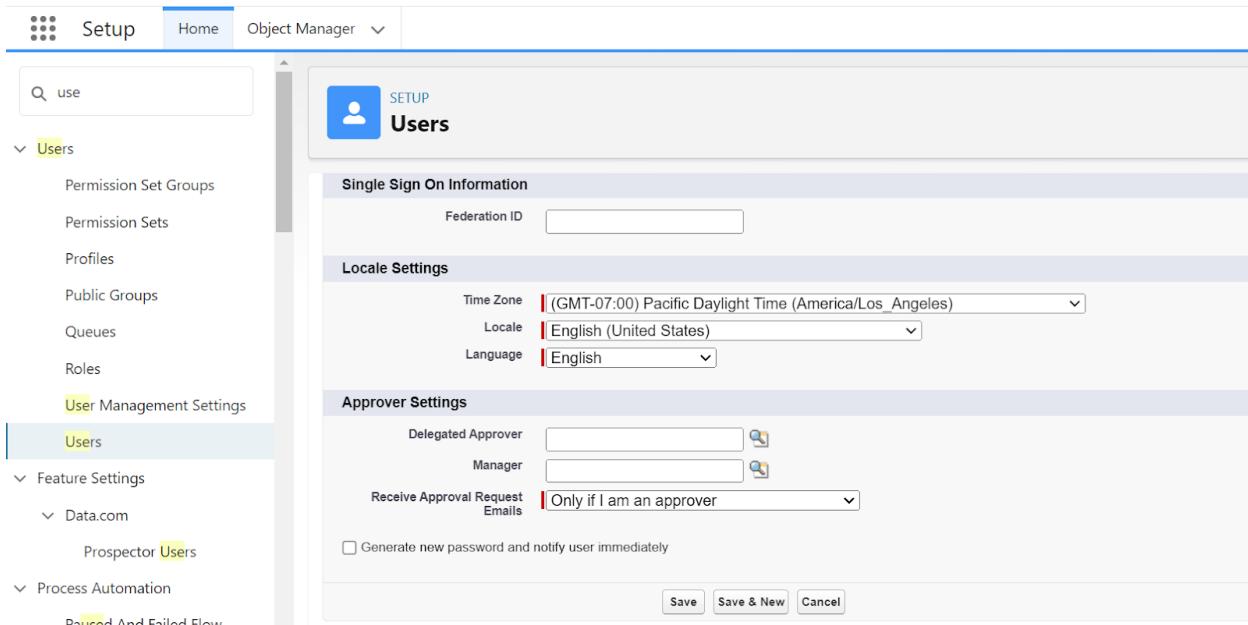
# 8. Users

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account.

## Creating a User:

1. From **Setup**, in the **Quick Find** box, enter **Users**, and then select **Users**.
2. Click **New User**.
3. Enter the user's name as **Amar K** and your email address, and create a unique username in the form of an email address. By default, the username is the same as the email address.
4. Select a **Role** as **Store Head**.
5. Select a **User License** as **Salesforce**.
6. Select a **Profile** as **Store Supervisor**.
7. Check **Generate new password and notify the user immediately** to have the user's login name and a temporary password emailed to your email.
8. Fill in the fields (First Name, Last Name, Alias, Email ID, Username, Nickname, Role, User License, Profile).
9. Click **Save**.

The screenshot shows the Salesforce Setup interface. The left sidebar is collapsed, and the main area displays the 'User Edit' screen under the 'Users' tab. The 'General Information' section is visible, containing fields for First Name (Amar), Last Name (k), Alias (ak), Email (mailid@gmail.com), Username (amar2133@salesforce.com), Nickname (User167161323313747430), Title (Store Supervisor), Company (empty), Department (empty), and Division (empty). To the right of these fields are dropdown menus for Role (Store Head), User License (Salesforce), Profile (Store Supervisor), and Active status (checked). Below these are several checkboxes for Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, and WDC User. At the bottom right is a 'Data.com User Type' dropdown set to '--None--'. The top right corner of the main window has a small blue icon with a white number '1'.



### 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

User Edit

**General Information**

First Name	John	Role	Billing Operator
Last Name	Teddy	User License	Salesforce Platform
Alias	Jtedd	Profile	Billing Operator
Email	teddyjohn@gmail.com	Active	<input checked="" type="checkbox"/>
Username	johnteddy@salesforce.com	Marketing User	<input type="checkbox"/>
Nickname	User167160299867441831	Offline User	<input type="checkbox"/>
Title	Vehicle Manager	Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>

Data.com Monthly Addition Limit: 300

Accessibility Mode (Classic Only):

High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling:

Debug Mode:

Make Setup My Default Landing Page:

Save Save & New Cancel

Required information: \*

Setup Home Object Manager

User Edit

**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

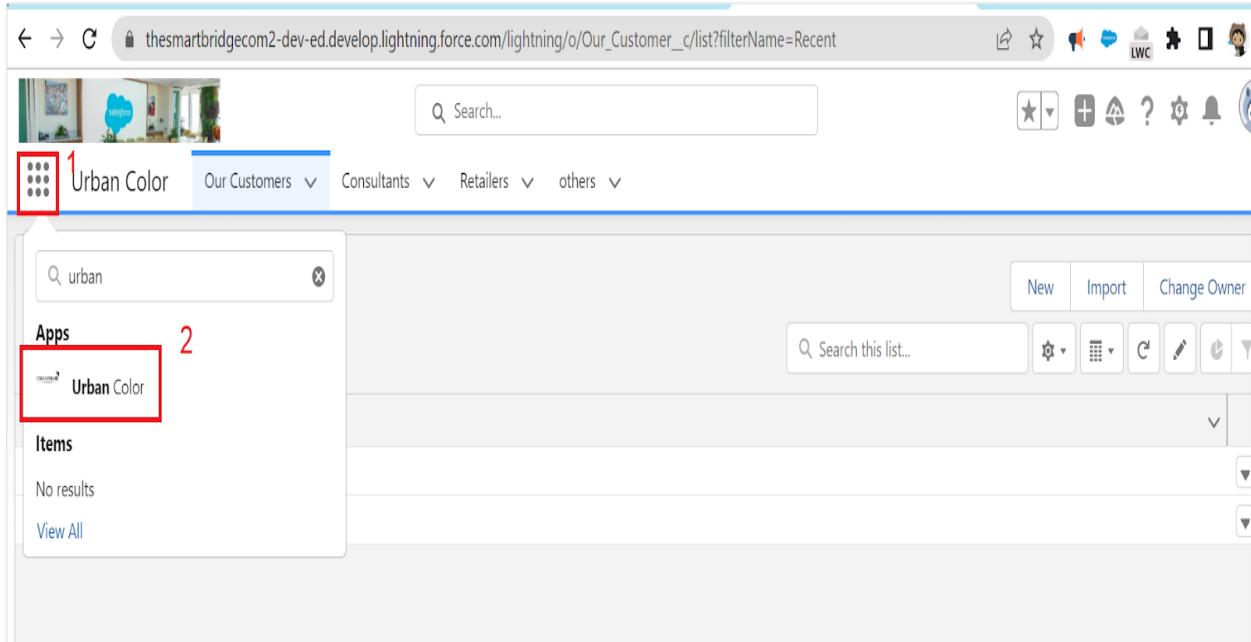
# 9. User Adoption

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.



A screenshot of the Salesforce application interface. At the top, there is a navigation bar with various icons and links: 'Urban Color' (highlighted with a red box and the number 1), 'Our Customers' (highlighted with a red box and the number 1), 'Consultants', 'Retailers', and 'others'. Below the navigation bar is a search bar labeled 'Search...'. On the right side of the header are several small icons. The main content area shows a list titled 'Our Customers Recently Viewed' with a sub-section 'Recently Viewed'. A message at the bottom states 'You haven't viewed any Our Customers recently.' In the top right corner of the content area, there are buttons for 'New' (highlighted with a red box and the number 2), 'Import', and 'Change Owner'. Below these buttons are search and filter tools.

## 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**.

A screenshot of a customer record detail page. The top bar is labeled 'Information' (highlighted with a red box and the number 1). The page contains several input fields:

- \*Customer Name: A required field indicated by a red border around the input box. A red box highlights the entire input box, and the number 1 is placed above it. Below the input box is the error message 'Complete this field.'
- Owner: Shows 'Hazari Ajay Kumar' with a user icon.
- Customer id: An optional field.
- \*Phone: A required field indicated by a red border around the input box. A red box highlights the entire input box, and the number 1 is placed above it.
- Email id: An optional field.

The bottom section is labeled 'Address' and contains three buttons: 'Cancel', 'Save & New', and 'Save' (highlighted with a red box and the number 2).

The screenshot shows the Salesforce interface for managing customers. At the top, there is a navigation bar with tabs: 'Urban Color', 'Our Customers' (which is highlighted with a red box and has a red number '1' above it), 'Consultants', 'Retailers', and 'others'. Below the navigation bar is a search bar with the placeholder 'Search this list...' and various filter and sort icons. A 'Recently Viewed' section shows two items: 'Suresh' and 'Kamal'. The main content area displays a customer record for 'Suresh'. The record has the following fields:

Customer Name	Owner
Suresh	Hazari Ajay Kumar
Customer id	5
Phone	97583873728
Email id	suresh@gmail.com
Address	Hyderabad
Additional Information	
Customer	

## Delete Record (Our Customer)

1. Click on the **App Launcher** on the left side of the screen.
2. Search for **Urban Color** and click on it.
3. Click on the **Our Customer** tab.
4. Click on the **Arrow** on the right-hand side of the particular record.
5. Click **Delete**, and then confirm by clicking **Delete** again.

1

2

3

Our Customers

Recently Viewed

New Import Change Owner

Search this list...

Customer Name

1 Suresh

2 Kamal

Edit

Delete

Change C Delete

Our Customers

Recently Viewed

New Import Change Owner

Search this list...

Customer Name

1 Suresh

2 Kamal

Delete Our Customer

Are you sure you want to delete this Our Customer?

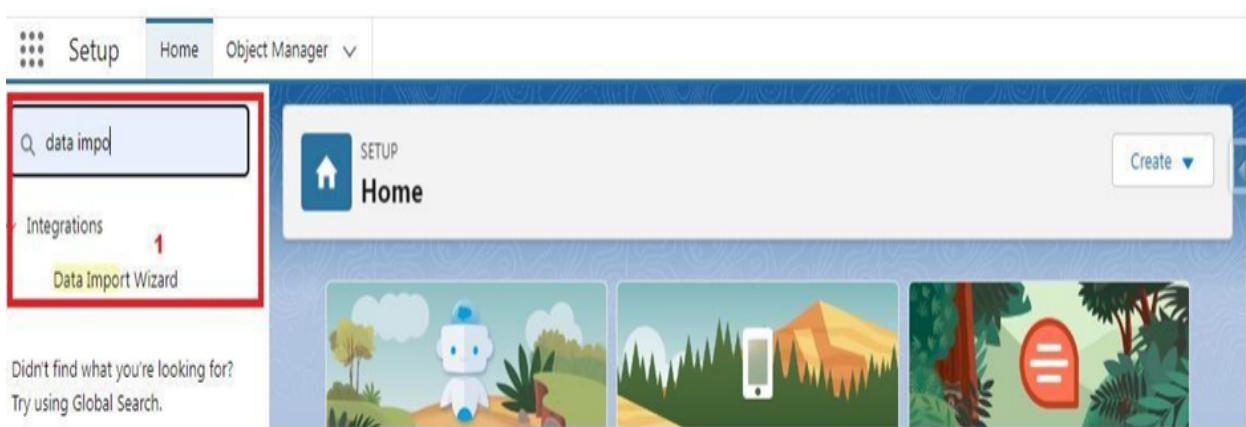
Cancel Delete

# 10. Import Data

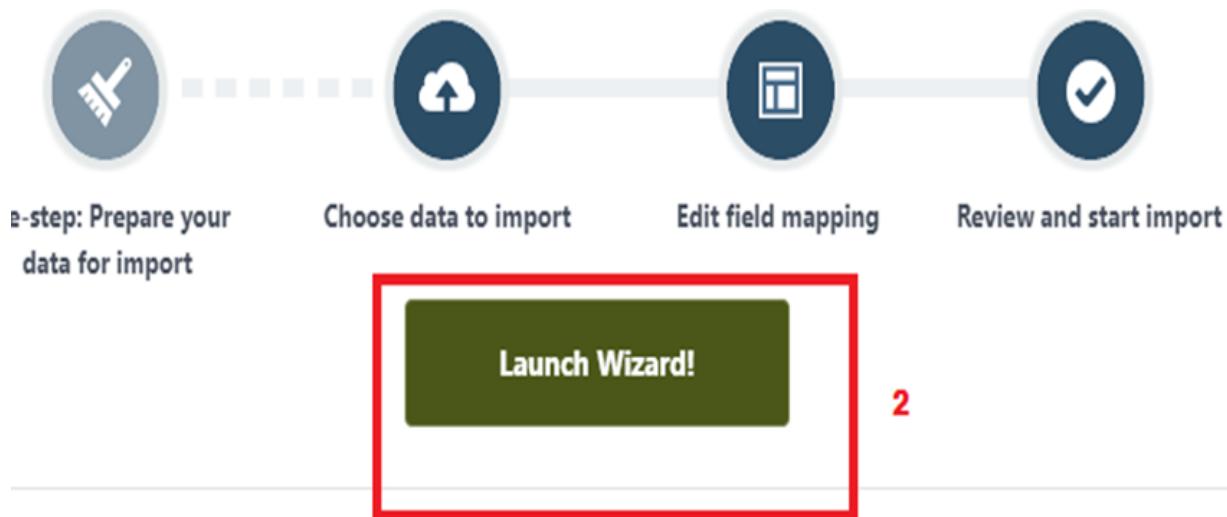
**Data Import Wizard**—This tool, accessible through the **Setup** menu, allows you to import data into common standard objects such as **Contacts**, **Leads**, **Accounts**, as well as data into custom objects.

## To Import Data

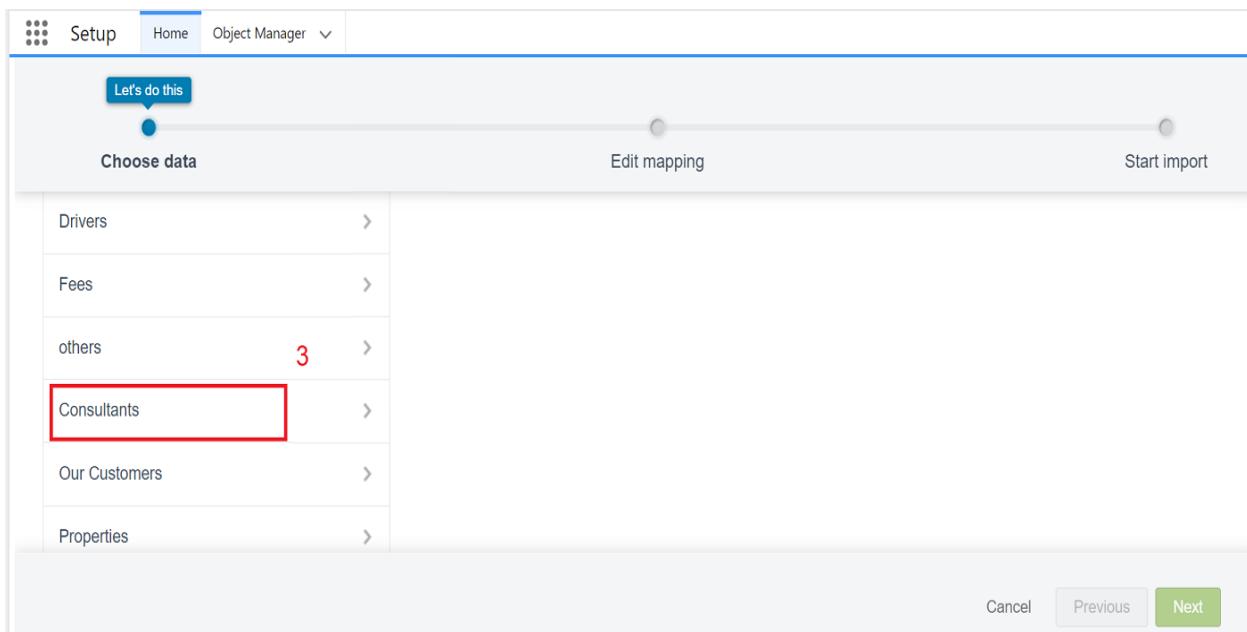
1. From **Setup**, click the **Home** tab.
2. In the **Quick Find** box, enter **Data Import** and select **Data Import Wizard**.



3. Click **Launch Wizard!**



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



## 5. Select Add New Records.

### Import your Data into Salesforce

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

What kind of data are you importing?

Standard objects    Custom objects

Attendees >

Buyers >

What do you want to do?

Add new records >

Update existing records >

Add new and update existing records >

Where is your data located?

## 6. Click CSV and choose the file **Consultant\_CSV** which was created earlier. Click **Next**.

What kind of data are you importing? ?

Standard objects Custom objects

Attendees >

Buyers >

Customers >

Departments ✓

What do you want to do? ?

Add new records ✓

Match by: ?  
--None--

Which User field in your file designates record owners? ?  
--None--

Trigger workflow rules and processes? ?  
 Trigger workflow rules and processes for new and updated records

Where is your data located? ?

Drag CSV file here to upload

CSV

5

Cancel Previous 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**.

Setup Home Object Manager ?

Almost done

Choose data Edit mapping Start import

Edit Field Mapping: Consultants Help for this page

Your file has been auto-mapped to existing Salesforce fields, but you can edit the mappings if you wish. Unmapped fields will not be imported.

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

Cancel Previous Next

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

Choose data

Edit mapping

Great job

Start import

Help for this page ⓘ

**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.

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

OK

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	
<a href="#">View Request</a>	<a href="#">View Result</a>	7512w00000Xqar	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:**

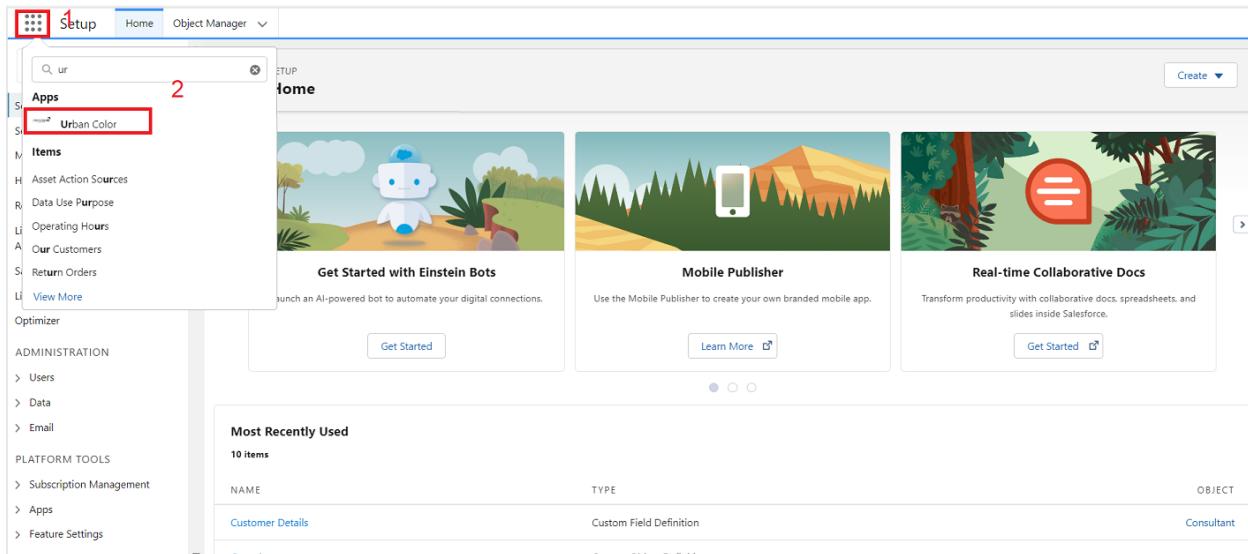
- Users can view and modify the reports and move them to/from any other folders they have access to as Editor or Manager.

**3. Manager:**

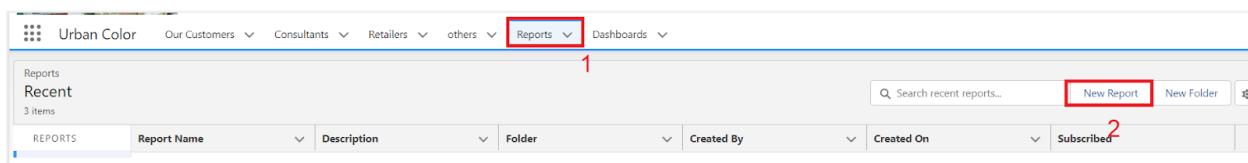
- Users can do everything Viewers and Editors can do, plus control other users' access levels to the folder.
- Managers can also delete the report.

## **11.1.Create Report**

- Click **App Launcher**.
- Select **Urban Color App**.
- 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**.

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

#### 7. Click the drop-down option on the **Payment** column and select **Bucket This Column**.

The screenshot shows a report configuration interface with the following details:

- REPORT**: New Consultants Report
- Consultants**: Selected
- Fields** panel:
  - Groups**: GROUP ROWS, Add group...
  - Columns**: Consultant: Consultant Name, Delivery Type, Products, Payment
- Context Menu (Payment Column)**:
  - 1: Sort Ascending, Sort Descending
  - 2: Bucket This Column (selected), Group Rows by This Field, Group Columns by This Field, Show Unique Count, Move Left, Move Right, Remove Column
- Preview Area**: Shows a table with 9 rows of data.

## 8. Name the bucket **Payment Type**.

The screenshot shows the 'Edit Bucket Column' dialog with the following details:

- Field**: Payment
- Bucket Name**: Payment type
- All Values (4)**:
  - Unbucketed Values (4)
  - Search Values
- BUCKET** table:
 

VALUE	BUCKET
Credit Card	
Debit Card	
Upi	
Cash	
- Buttons**: Add Bucket, Move To ▾, Cancel, Apply

9. Click **Add Bucket** and name it **NetBanking**.

10. Click **Add Bucket** and name it **Cash**.

## Edit Bucket Column

\* Field  \* Bucket Name

All Values (4)	Search Values
<input type="text" value="Bucket Name"/> <b>2</b>	<input type="text"/> <b>SEARCH</b>
<b>Unbucketed Values (4)</b>	<b>VALUE</b> <b>BUCKET</b>
	<input type="checkbox"/> Credit Card <input type="checkbox"/> Debit Card <input type="checkbox"/> Upi <input type="checkbox"/> Cash

Bucket remaining values as Other **1**

Add Bucket **2** Move To ▾

Cancel Apply

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

## Edit Bucket Column

\* Field  \* Bucket Name

All Values (4)	Search Values
<input type="text" value="Net Banking (0)"/> <b>2</b> <input type="text" value="Cash (0)"/> <b>2</b>	<input type="text"/> <b>SEARCH</b>
<b>Unbucketed Values (4)</b>	<b>VALUE</b> <b>BUCKET</b>
	<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 ▾

Cancel Apply

**Edit Bucket Column**

* Field Payment	* Bucket Name Payment type
All Values (4)	Search Values
Net Banking (0)	VALUE BUCKET
Cash (0)	<input checked="" type="checkbox"/> Credit Card
Unbucketed Values (4)	<input checked="" type="checkbox"/> Debit Card
<input type="checkbox"/> Bucket remaining values as Other	<input checked="" type="checkbox"/> Upi
Add Bucket	Move To ▾

**Edit Bucket Column**

* Field Payment	* Bucket Name Payment type
All Values (4)	Search Values
Net Banking (3)	VALUE BUCKET
<b>Cash (1)</b>	<input checked="" type="checkbox"/> Cash
Unbucketed Values (0)	
<input type="checkbox"/> Bucket remaining values as Other	
Add Bucket	Move To ▾

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.

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

Fields >

Groups	Previewing a limited number of records. Run the report to see everything.
GROUP ROWS	Payment type ↑ ↓ Consultant: Consultant Name ▾ Delivery Type ▾ Products ▾ Payment ▾
Add group...	Net Banking (7)
Payment type	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
Subtotal	
Cash (2)	Dev Raj Self Pickup Lipstick Cash
	Shankar Self Pickup Face Pack Cash
Subtotal	
Total (9)	

Groups

- GROUP ROWS
- Add group...
- Payment type

GROUP COLUMNS

- Add group...

Columns

- Add column...
- Consultant: Consultant Name
- Delivery Type
- Products
- Payment

**15.Click Refresh.**

**16.Click Save and Run.**

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

The screenshot shows the 'New Consultants Report' page under the 'REPORT' tab. On the left, there's a sidebar with 'Fields' and 'Filters'. The 'Groups' section is expanded, showing 'GROUP ROWS' with 'Add group...' and 'Payment type' selected. The 'Columns' section is also expanded, showing 'Add column...' and several fields: 'Consultant: Consultant Name', 'Delivery Type', 'Products', and 'Payment'. To the right is a preview table titled 'Net Banking (7)' with columns for Consultant Name, Delivery Type, Products, and Payment. The table includes rows for Ajith, Babu, Chitra, Swathi, Prasad, Ajay Kumar, and Sandeep. Below the main table are 'Subtotal' and 'Total (9)' sections. A note at the top says 'Previewing a limited number of records. Run the report to see everything.'

**18.Click Save.**

The screenshot shows the 'Save Report' dialog box. It has three main sections highlighted with red numbers: 1. 'Report Name' field containing 'Consultants Report'. 2. 'Folder' dropdown menu showing 'Private Reports'. 3. 'Save' button, which is highlighted with a red box.

## 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.

The screenshot shows the Salesforce Setup Home page. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The sidebar on the left has sections like 'Setup', 'Apps' (with 'Urban Color' highlighted), 'Items', 'Administration', and 'Platform Tools'. The main content area features three cards: 'Get Started with Einstein Bots', 'Mobile Publisher', and 'Real-time Collaborative Docs'. Below these is a 'Most Recently Used' section showing 'Customer Details' under 'Custom Field Definition'.

**3. Click the Reports tab.**

**4. Click on the Urban Color Report to view the records.**

The screenshot shows the Salesforce Reports page. The top navigation bar includes 'Urban Color', 'Our Customers', 'Consultants', 'Retailers', 'others', 'Reports' (highlighted with a red box), and 'Dashboards'. The sidebar on the left has sections like 'Reports', 'Recent' (showing 'Consultants Report' highlighted with a red box), 'Created by Me', 'Public Reports', 'All Reports', 'Folders', 'Created by Me', 'Shared with Me', and 'Favorites'. The main content area displays a table of recent reports with columns: Report Name, Description, Folder, Created By, and Created On.

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

1. Here's a step-by-step guide to creating a dashboard in the Urban Color application:
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"

New Dashboard

---

\* Name 3

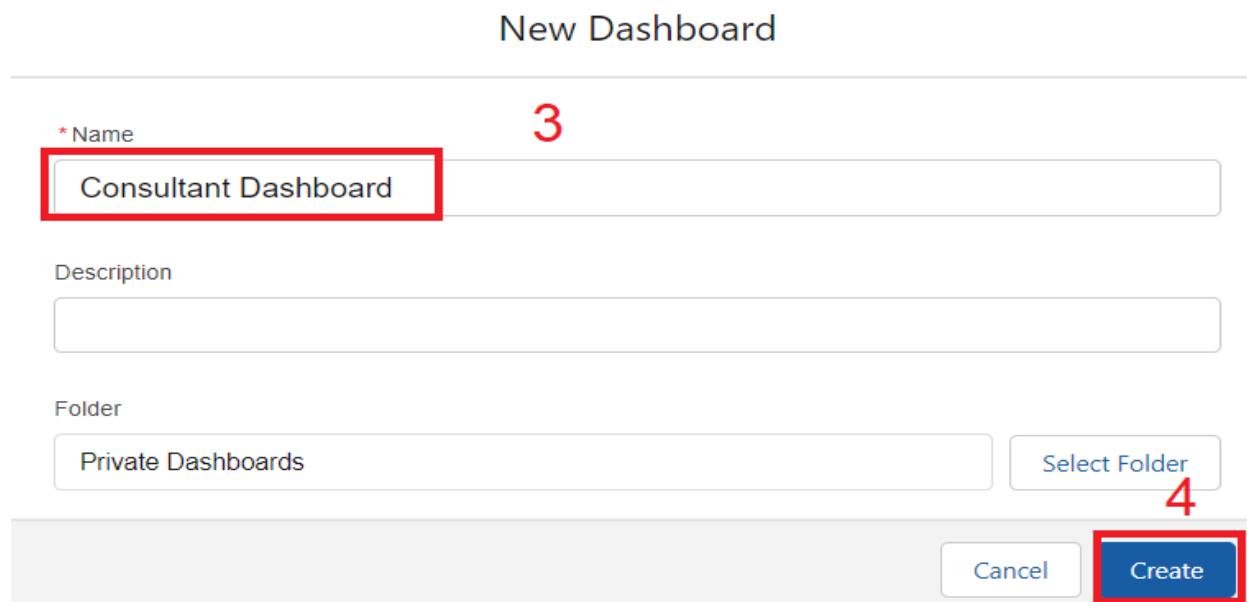
Consultant Dashboard

Description

Folder 4

Private Dashboards Select Folder

Cancel Create



5. **Add Components to the Dashboard:**
  - Click on "+ Component" to add a new component.
  - Select the "Consultants Report" you created earlier.

Select Report

Reports

Recent

Created by Me

Private Reports

Public Reports

All Reports

Folders

Created by Me

Shared with Me

All Folders

Select Report

Search Reports and Folders...

Consultants Report  
Hazari Ajay Kumar - [REDACTED] Private Reports

Sample Flow Report: Screen Flows  
Automated Process - Dec 17, 2022, 7:50 PM - Public Reports

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

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

Cancel Select

## 6. Choose Data Visualization:

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

Add Component

Report

Consultants Report

Use chart settings from report

Display As

Payment type

X-Axis

Record Count

Preview

Consultants Report

Record Count

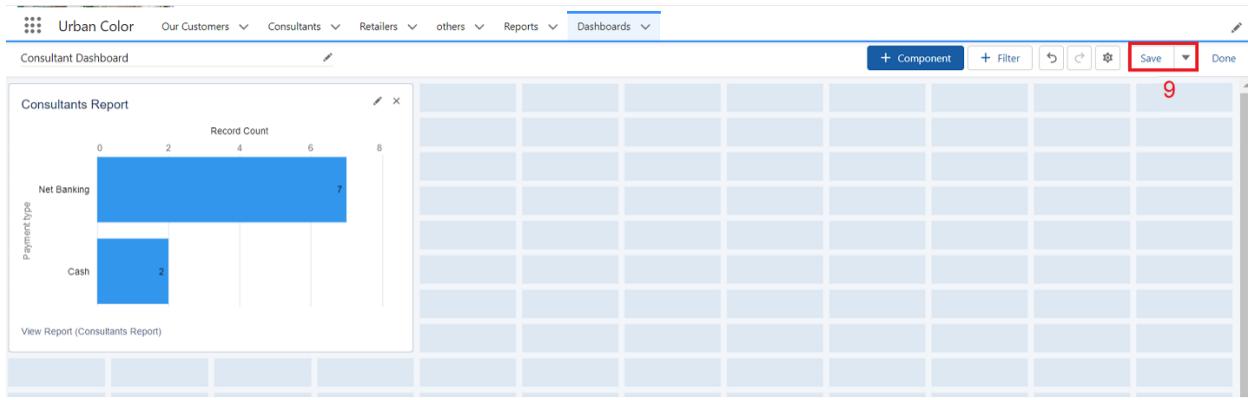
Payment type	Record Count
Net Banking	7
Cash	2

View Report (Consultants Report)

Cancel Add

## 7. Save Your Dashboard:

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



## 12.2. View Dashboard

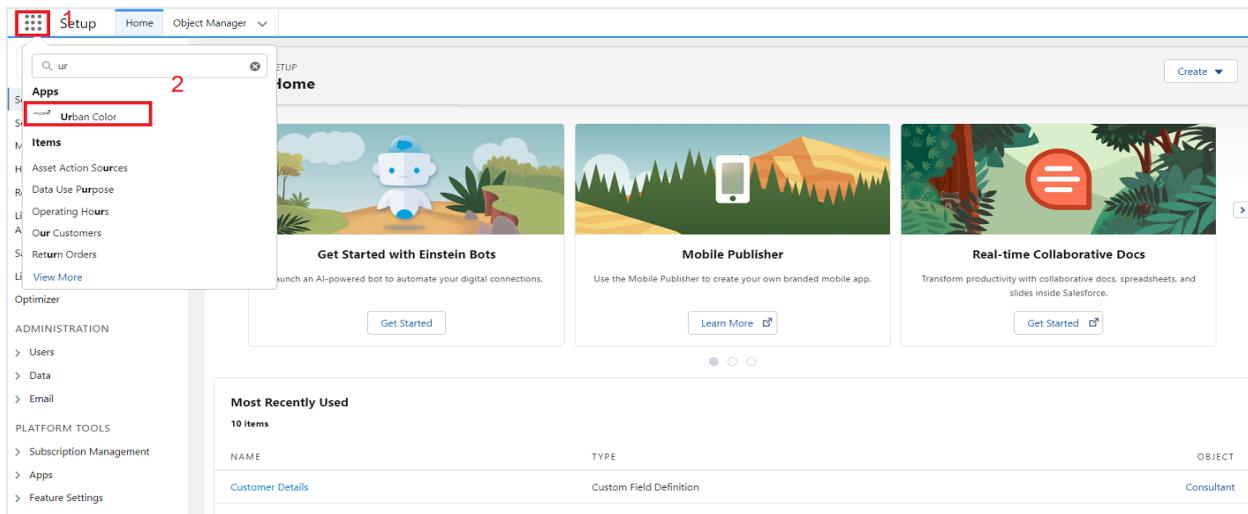
To view the dashboard, follow these steps:

### 1. Open the App Launcher:

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

### 2. Search for the Dashboard:

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



### 3. Navigate to the Dashboard Tab:

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

### 4. View the Graph:

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

The screenshot shows a user interface for managing dashboards. At the top, there is a navigation bar with links: Urban Color, Our Customers, Consultants, Retailers, others, Reports, Dashboards, and a search bar labeled 'Search recent dashboards...'. The 'Dashboards' link is highlighted with a red box and the number '3' above it. Below the navigation is a section titled 'Recent' with a subtitle '3 items'. A table lists the dashboards:

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Consultant Dashboard	4	Private Dashboards	Hazari Ajay Kumar	6/20/2023, 10:46 PM	
Created by Me	Opportunities Details		Private Dashboards	Hazari Ajay Kumar	4/12/2023, 11:57 PM	
Private Dashboards	Opportunity details		Private Dashboards	Hazari Ajay Kumar	4/12/2023, 11:48 PM	

On the left side, there are navigation links: 'Recent' (highlighted), 'Created by Me', 'Private Dashboards', and 'All Dashboards'. Below these is a section titled 'FOLDERS'.