

Cosmetics Store Management

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Abstract

This project presents a comprehensive Cosmetics Store Management system designed to streamline operations, enhance customer experience, and optimize inventory management within the cosmetics retail sector. The system integrates various functionalities, including product management, sales tracking, customer relationship management, and reporting features.

The objective of this project is to develop an efficient platform that enables store owners to manage their inventory effectively, track sales trends, and maintain customer records seamlessly. By implementing a user-friendly interface, the system aims to facilitate easy navigation for both staff and customers, ultimately improving service quality and operational efficiency.

Through this project, we also highlight the importance of data analytics in the cosmetics industry, providing insights that can drive marketing strategies and improve customer satisfaction. Overall, the Cosmetics Store Management system serves as a vital tool for retailers seeking to thrive in a competitive market while ensuring an enhanced shopping experience for their customers.

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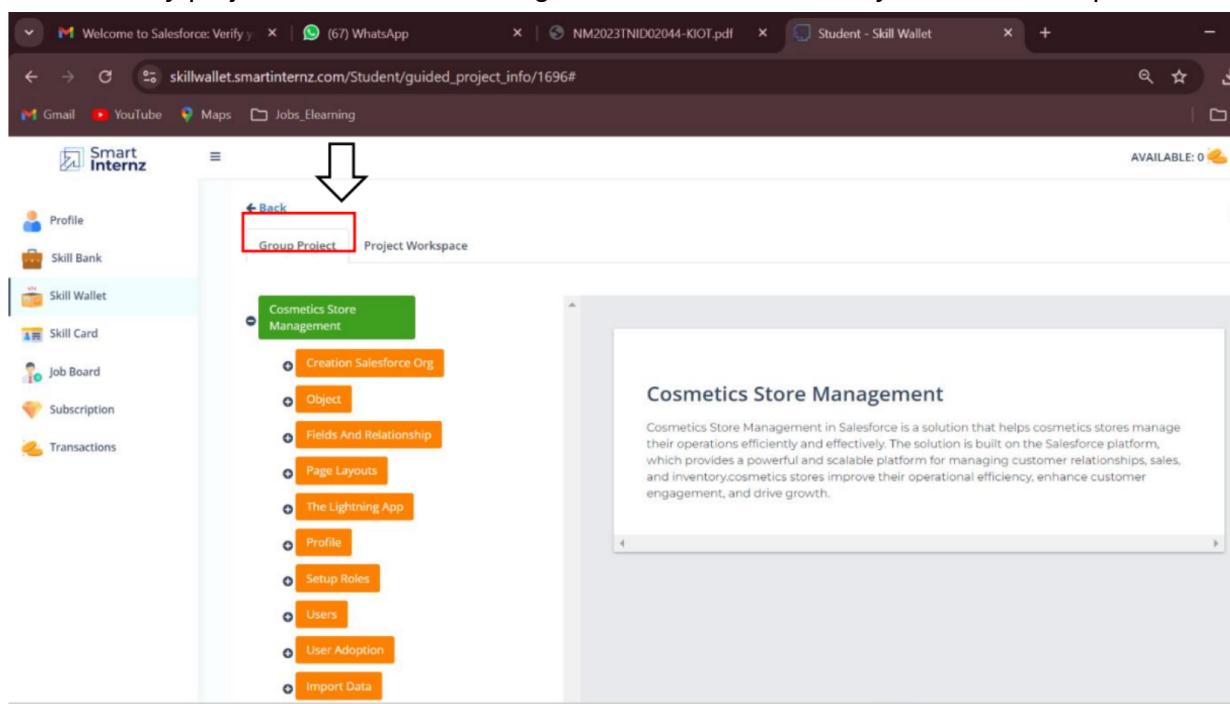
1.Creation Salesforce Org

1.1.Logging into SmartInternz Skill Wallet:

- 1. Visit**
- 2. The SmartInternz website:** Go to SmartInternz.
- 3. Locate the Login Option:** On the homepage, find the login or sign-in option.
- 4. Use your credentials:** Enter the email and password you registered with. If you're using a platform-linked account (e.g., Google, LinkedIn), use the corresponding option to sign in.
- 5. Navigate to the Skill Wallet:** After logging in, go to your dashboard or profile section where you should find "Skill Wallet" or "Guided Projects" listed.

1.2.Accessing Guided Projects:

1. After logging in, navigate to the "Guided Projects" tab or section on the SmartInternz platform.
2. Here, you should be able to see any projects you've been assigned or those you've enrolled in.
3. Click on any project to view the details, guidelines, and resources you need to complete it.



1.3.Creating Developer Account

Creating a developer org in salesforce.

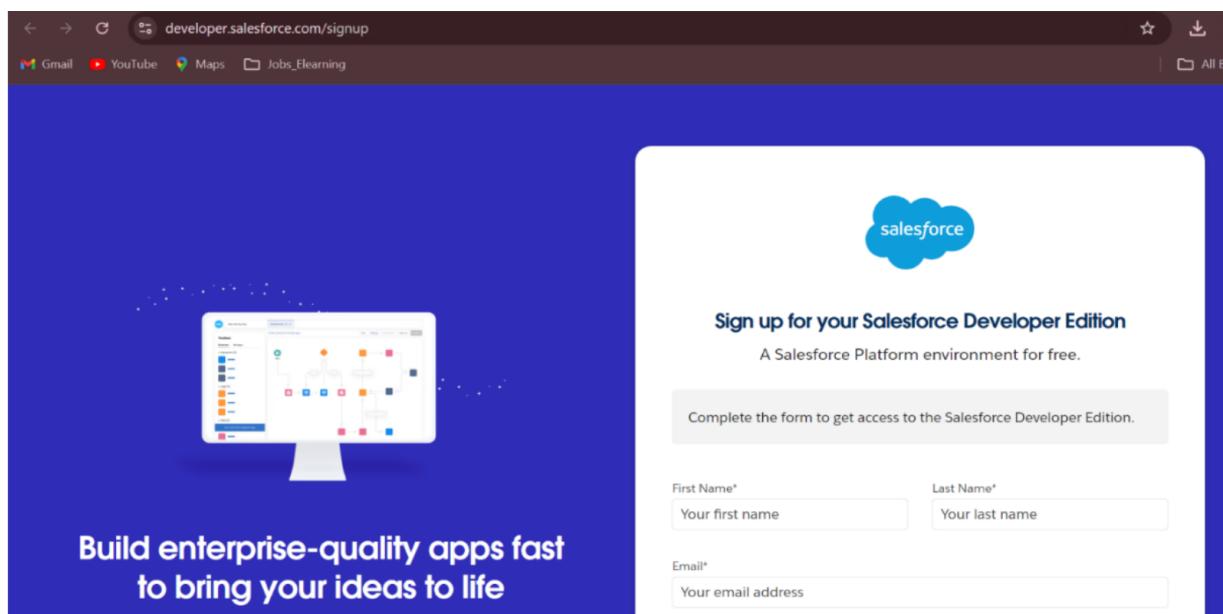
1. Go to [developers.salesforce.com/signup](https://developer.salesforce.com/signup).
2. Click on sign up.¹
3. On the sign up form, enter the following details :

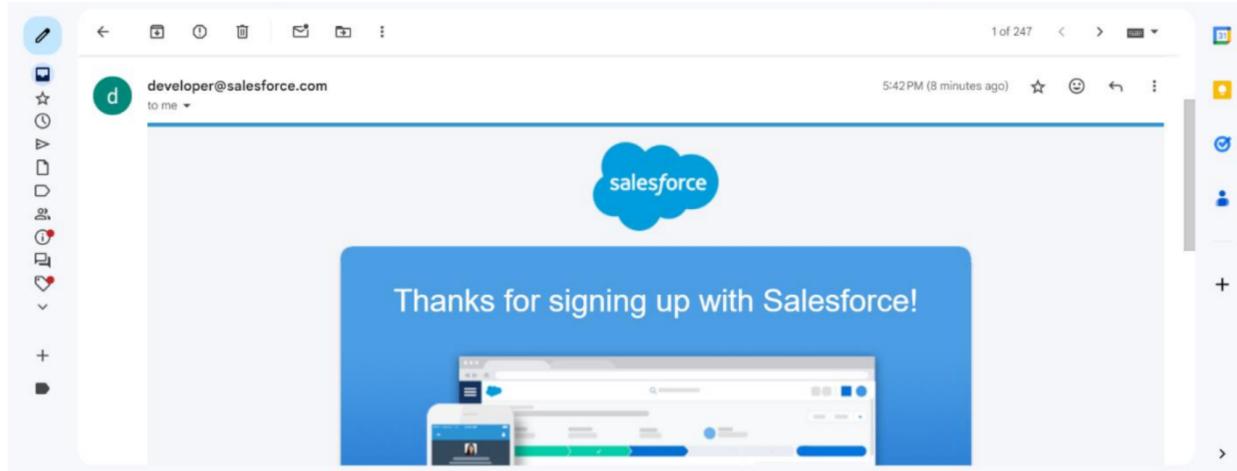
- a. First name & Last name
- b. Email
- c. Role : Developer
- d. Company : College Name
- e. County : India
- f. Postal Code : pin code
- g. Username : should be a combination of your name and company.

This need not be an actual email id, you can give anything in the format

:username@organization.com

Click on sign up after filling these.





A screenshot of a web browser showing the Salesforce login page. The URL is "login.salesforce.com". The page has a large "salesforce" logo at the top. On the left is a login form with fields for "Username" (containing "aswitha@smart.com") and "Password" (containing "....."). Below the password field is a "Log In" button. To the right of the form is a promotional section with the heading "Sell, market, and service with the world's #1 CRM." It includes a "WATCH DEMOS" button, a "FREE TRIAL" button, and a circular graphic featuring a smiling man named "Jay Sharma" with roles like "Sales" and "Marketing". The bottom of the page shows the copyright notice "© 2024 Salesforce, Inc. All rights reserved. | Privacy" and a taskbar with various icons.

2.Objects

Salesforce objects are database tables that permit you to store data that is specific to an organisation. Salesforce objects are of two types: Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.

Custom objects :Our Customers, Consultants, Retailers, Others.

2.1.To Create an object:

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

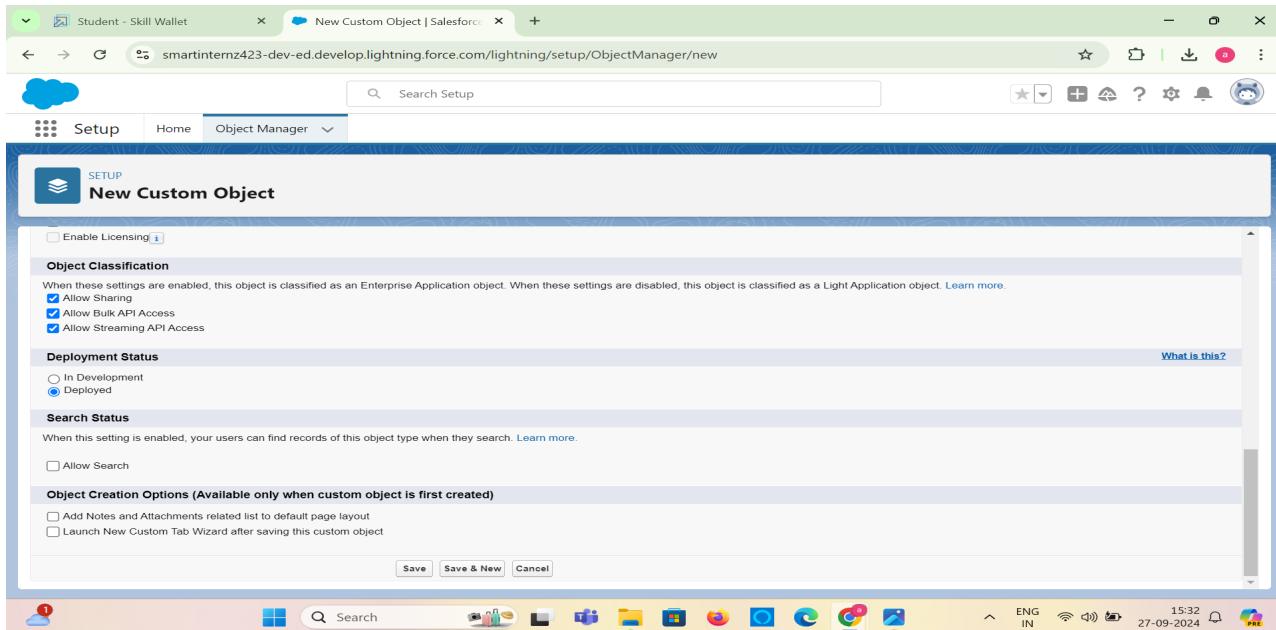
On the Custom Object Definition page, create the object as follows:

- 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.

The screenshot shows the Salesforce Object Manager page. At the top, there's a search bar labeled "Search Setup". Below it, a navigation bar has "Setup" selected. The main area is titled "Object Manager" with a subtitle "51+ Items, Sorted by Label". A modal window titled "Custom Object" is open, with a sub-modal "Custom Object from Spreadsheet". The table lists various standard objects:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MOD
Account	Account	Standard Object		
Activity	Activity	Standard Object		
Address	Address	Standard Object		
Alternative Payment Method	AlternativePaymentMethod	Standard Object		
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object		
Appointment Category	AppointmentCategory	Standard Object		
Appointment Invitation	AppointmentInvitation	Standard Object		
Appointment Invitee	AppointmentInvitee	Standard Object		
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object		
Asset	Asset	Standard Object		
Asset Action	AssetAction	Standard Object		

The screenshot shows the "New Custom Object" definition edit page. The title bar says "New Custom Object | Salesforce". The main section is titled "New Custom Object" and contains a message: "Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)". Below this, there's a "Custom Object Definition Edit" form with "Save", "Save & New", and "Cancel" buttons. The "Custom Object Information" section includes fields for "Label" (with example "Account"), "Plural Label" (with example "Accounts"), and a checkbox "Starts with vowel sound". The "Object Name" field is populated with "Account" (example "Account"). The "Description" field is a large text area. At the bottom, there are links for "Context-Sensitive Help Setting" and "Open the standard Salesforce.com Help & Training window". The status bar at the bottom shows system information like "ENG IN", "15:31", "27-09-2024", and a battery icon.



2.2.Consultants Object Creation

To Create an object:

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 Consultant Object

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

- Label: Consultant
- Plural Label: Consultants
- Record Name: Consultants
- 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 others.
- For Tab Style, select any icon.
- Leave all defaults as is. Click Next, Next, and Save.

2.3.Retailers object creation

To Create an object:

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 Retailer Object

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

- Label: Retailer
- Plural Label: Retailers
- Record Name: Retailers
- 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 Retailers.
- For Tab Style, select any icon.
- Leave all defaults as is. Click Next, Next, and Save.

2.4.Others Object Creation

To Create an object:

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 others Object

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

- Label: other
- Plural Label: others
- Record Name: others
- 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 others.
- For Tab Style, select any icon.
- Leave all defaults as is. Click Next, Next, and Save.

The screenshot shows the Salesforce Setup interface with the following details:

Custom Object Tabs

Action	Label	Tab Style	Description
Edit Del	Consultants	Car	
Edit Del	others	Jewel	
Edit Del	Our Customers	Castle	
Edit Del	Retailers	Guitar	

Web Tabs

New | What Is This?

No Web Tabs have been defined.

Visualforce Tabs

New | What Is This?

3.Fields and Relationships

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.

3.1.Fields in Our Customers objects

Fields in Our Customers objects follow below data types:

S NO	Feild 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

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes tabs for 'Student - Skill Wallet', 'Our Customer | Salesforce', and a search bar. Below the header is a toolbar with various icons. The main content area is titled 'SETUP > OBJECT MANAGER' and 'Our Customer'. On the left, there's a sidebar with links like 'Details', 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', etc. The 'Fields & Relationships' section is currently selected and displays a table with 10 items. The table columns are 'FIELD LABEL', 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED'. The data in the table is as follows:

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_c	Text(1)		
Email id	Email_id_c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Mobile Number	Mobile_c	Phone		

3.2.Fields in Consultants objects

Fields in Consultants objects follow below data types:

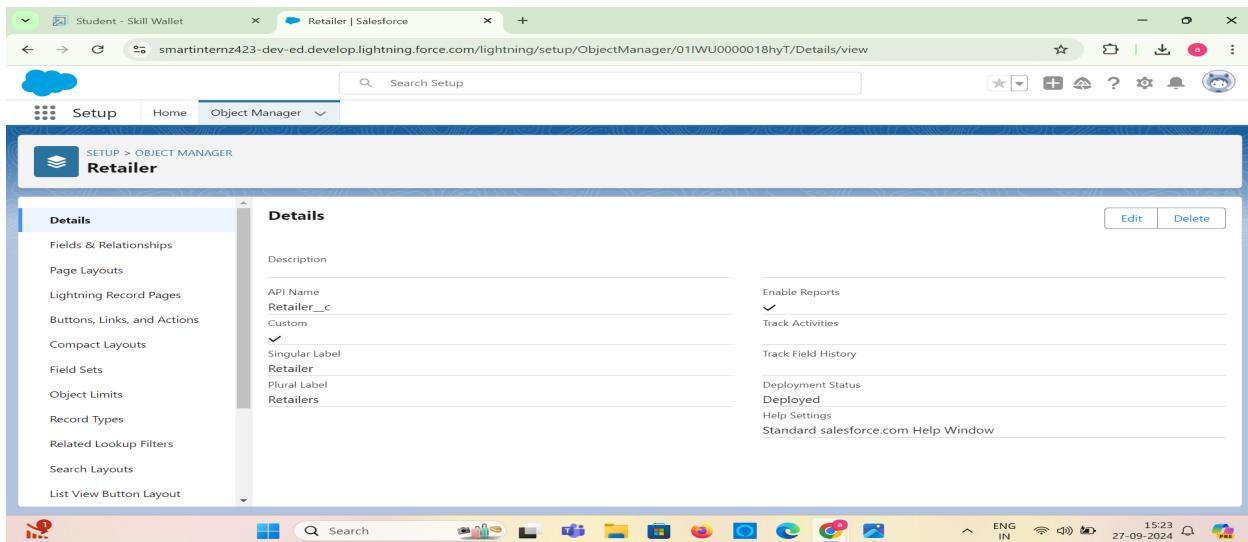
S NO	Field Label	Data Type
1	Customer id	Auto Number
2	Customer name	Text
3	Mobile number	Phone
4	Email id	Email
5	Delivery Type 1)Self Pickup 2)Courier	Picklist
6	Products 1)Lipstick 2)Compact 3)Eyeliner 4)Face pack 5)Lip balm 6)Nail Polish	Multi-picklist
7	Payment 1)Debit card 2)Credit card 3)UPI 4)Cash	Picklist
8	Customer Details	Lookup(Our Customers Object)
9	Address	Text Long

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. A search bar at the top right contains the text 'Search Setup'. Below it, the 'Object Manager' tab is active. On the left, a sidebar lists various setup categories: 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 displays the 'Details' section for the 'Consultant' object. The 'Description' field is empty. Under 'API Name', it shows 'Consultant__c' with a 'Custom' checkbox checked. Under 'Singular Label', it shows 'Consultant' with a 'Plural Label' field containing 'Consultants'. On the right side, there are checkboxes for 'Enable Reports' (checked), 'Track Activities', and 'Track Field History'. Below these are sections for 'Deployment Status' (set to 'Deployed') and 'Help Settings' (set to 'Standard salesforce.com Help Window'). At the bottom right of the main area are 'Edit' and 'Delete' buttons.

3.3.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	Email id	Email
5	Delivery Type 1)Self Pickup 2)Courier	Picklist
6	Products 1)Lipstick 2)Compact 3)Eyeliner 4)Face pack 5)Lip balm 6)Nail Polish	Multi-picklist
7	Payment 1)Debit card 2)Credit card 3)UPI 4)Cash	Picklist
8	Customer Details	Master-Detail Relationship(Our Customers Object)



3.4.Fields in Others Objects

Fields in others objects follow below data types:

SNO	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

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes tabs for 'Setup', 'Home', and 'Object Manager'. The current page is 'SETUP > OBJECT MANAGER other'. The left sidebar lists various configuration 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 displays the 'Details' section for the 'other' object. It includes fields for API Name ('other__c'), Singular Label ('other'), and Plural Label ('others'). Other settings shown include 'Description', 'Enable Reports' (checked), 'Track Activities', 'Track Field History', 'Deployment Status' (Deployed), 'Help Settings', and 'Help Window' (Standard salesforce.com Help Window). The bottom of the screen shows the Windows taskbar with various icons and system status indicators.

4. Page Layouts

In Salesforce, page layouts define the organisation 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 organisation.

4.1. 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. The top navigation bar includes tabs for 'Student - Skill Wallet' and 'Consultant | Salesforce'. The main header has a search bar labeled 'Search Setup' and various system icons. The left sidebar is titled 'SETUP > OBJECT MANAGER' and contains a list of options: Details, Fields & Relationships, Page Layouts (which is selected and highlighted in blue), 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 'Page Layouts' and shows a single item: '1 items, Sorted by Page Layout Name'. A table displays the layout details:

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Consultant Layout	Bodanapu Aswitha Lakshmi, 25/09/2024, 8:47 am	Bodanapu Aswitha Lakshmi, 25/09/2024, 9:43 am

At the bottom of the page, there are buttons for 'Quick Find', 'New', and 'Page Layout Assignment'. The bottom of the screen shows the Windows taskbar with various pinned icons and the date/time: '16:47 27-09-2024'.

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

The screenshot shows the Salesforce Setup interface for the 'Object Manager'. The top navigation bar includes tabs for 'Setup' (selected), 'Home', and 'Object Manager'. The main title is 'SETUP > OBJECT MANAGER' followed by 'Consultant'. On the left, a sidebar lists various setup categories like 'Details', 'Fields & Relationships', and 'Page Layouts' (which is currently selected). The main content area displays the 'Page Layouts' configuration for the 'Consultant' object. It shows a 'Layout Properties' toolbar with buttons for 'Save', 'Quick Save', 'Preview As...', 'Cancel', 'Undo', 'Redo', and 'Layout Properties'. A 'Quick Find' search bar is also present. The layout editor displays fields such as Customer Id, Customer Name, Mobile Number, Delivery Type, Address, Email Id, Product, Payment, and Customer details. Fields like Customer Id and Mobile Number have sample values (GEN-2004-001234 and 1-415-555-1212 respectively). Other fields like Address, Email Id, and Product have sample text values. The bottom of the layout editor shows sections for 'System Information', 'Custom Links', and 'Custom Buttons'. The status bar at the bottom right shows the URL, system information (ENG IN), date (27-09-2024), and time (16:49).

5.The Lightning App

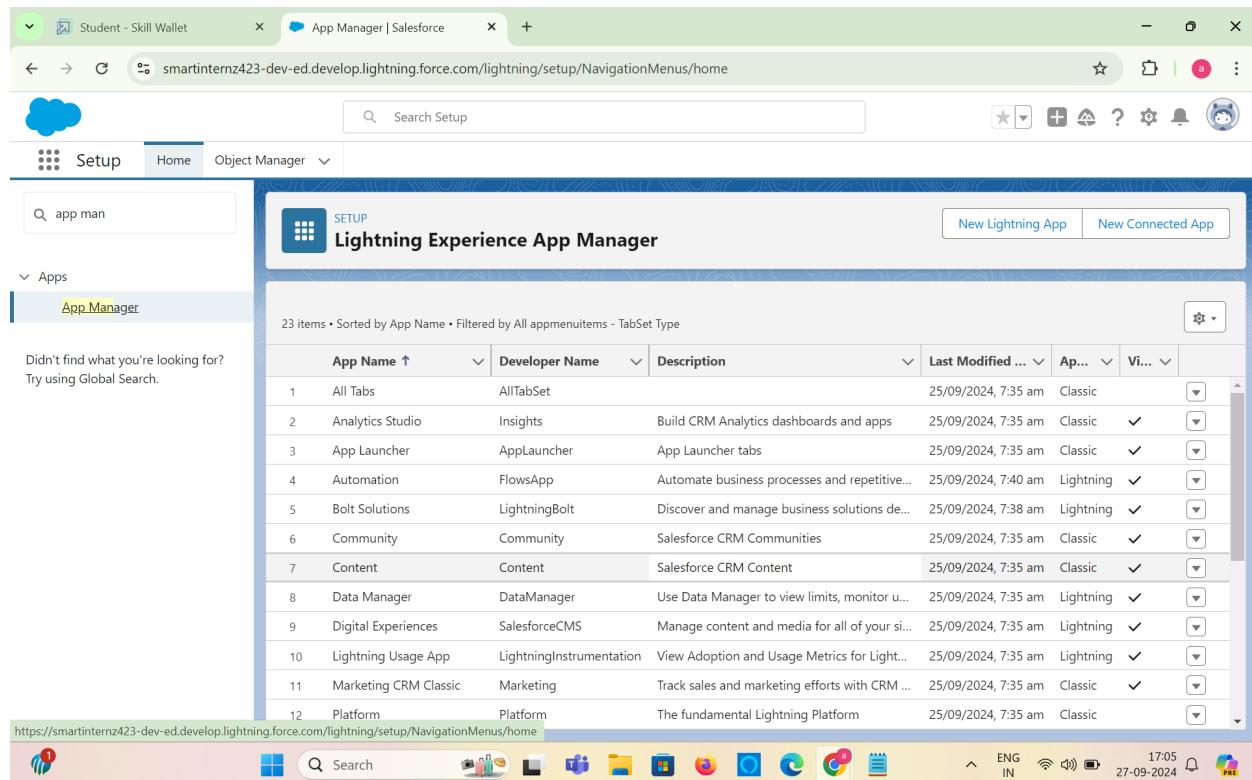
An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

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:

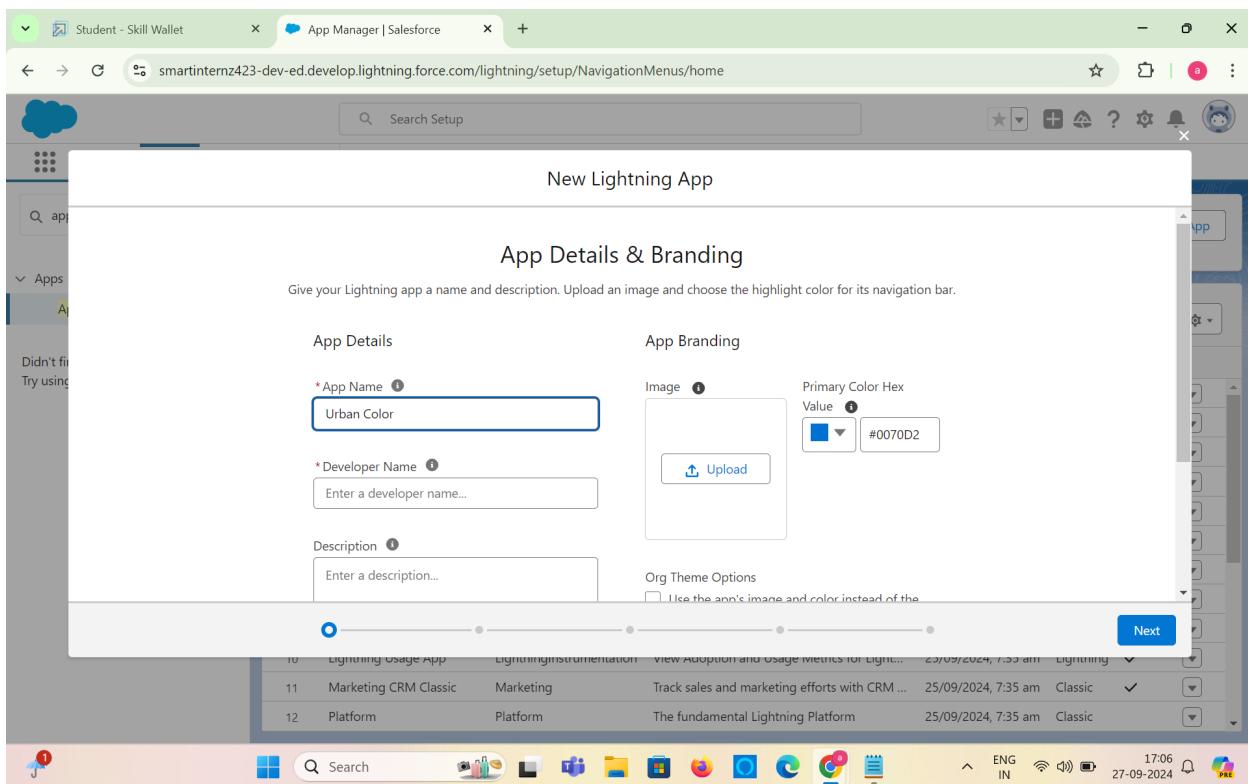
1. Go to setup page --> search “app manager” in quick find --> select “app manager” --> click on New lightning App.



The screenshot shows the Salesforce App Manager interface. At the top, there's a search bar with "Search Setup" and a "New Lightning App" button. Below the header, a sidebar on the left has "Setup" selected and shows a list of apps, with "App Manager" currently highlighted. The main content area displays a table titled "Lightning Experience App Manager" with 23 items. The columns are "App Name", "Developer Name", "Description", "Last Modified", "App Type", and "Visible". The table lists various built-in apps like All Tabs, Analytics Studio, App Launcher, etc. The bottom of the screen shows the standard Windows taskbar with icons for Start, Search, Task View, File Explorer, and several pinned applications.

App Name ↑	Developer Name	Description	Last Modified ...	Ap... ↓	Vi... ↓
1 All Tabs	AllTabSet	Build CRM Analytics dashboards and apps	25/09/2024, 7:35 am	Classic	✓
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	25/09/2024, 7:35 am	Classic	✓
3 App Launcher	AppLauncher	App Launcher tabs	25/09/2024, 7:35 am	Classic	✓
4 Automation	FlowsApp	Automate business processes and repetitive...	25/09/2024, 7:40 am	Lightning	✓
5 Bolt Solutions	LightningBolt	Discover and manage business solutions de...	25/09/2024, 7:38 am	Lightning	✓
6 Community	Community	Salesforce CRM Communities	25/09/2024, 7:35 am	Classic	✓
7 Content	Content	Salesforce CRM Content	25/09/2024, 7:35 am	Classic	✓
8 Data Manager	DataManager	Use Data Manager to view limits, monitor u...	25/09/2024, 7:35 am	Lightning	✓
9 Digital Experiences	SalesforceCMS	Manage content and media for all of your si...	25/09/2024, 7:35 am	Lightning	✓
10 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Light...	25/09/2024, 7:35 am	Lightning	✓
11 Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM ...	25/09/2024, 7:35 am	Classic	✓
12 Platform	Platform	The fundamental Lightning Platform	25/09/2024, 7:35 am	Classic	✓

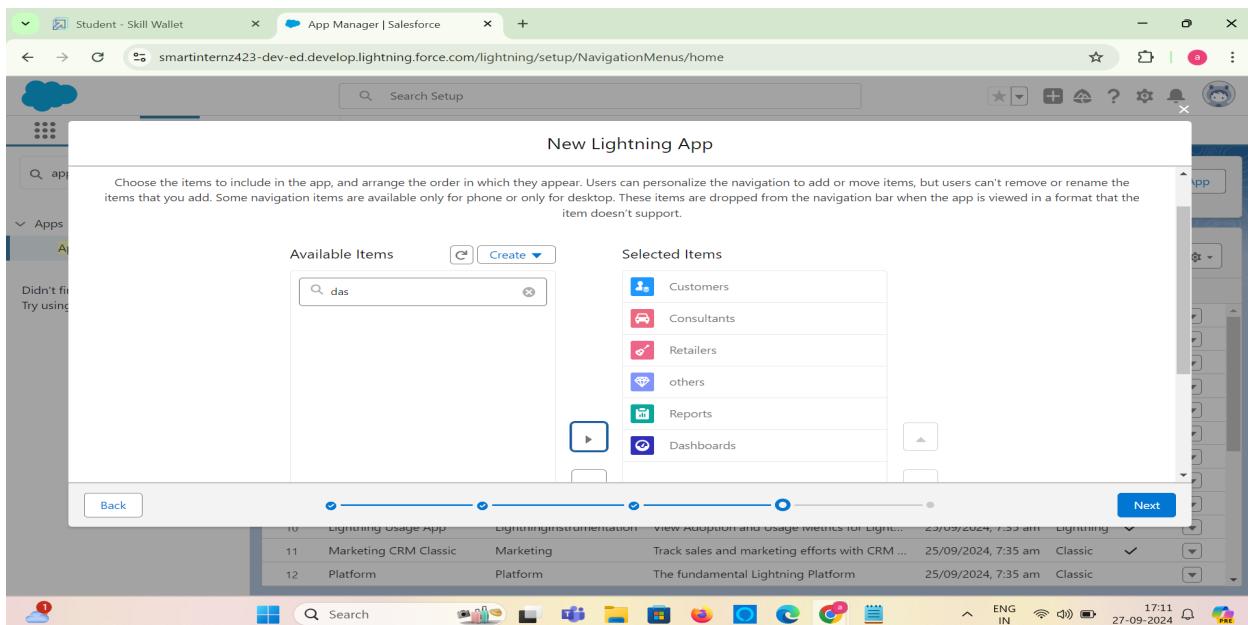
2. Fill the app name as Urban Color in app details and branding --> Next --> (App option page) keep it as default --> Next --> (Utility Items) keep it as default --> Next.



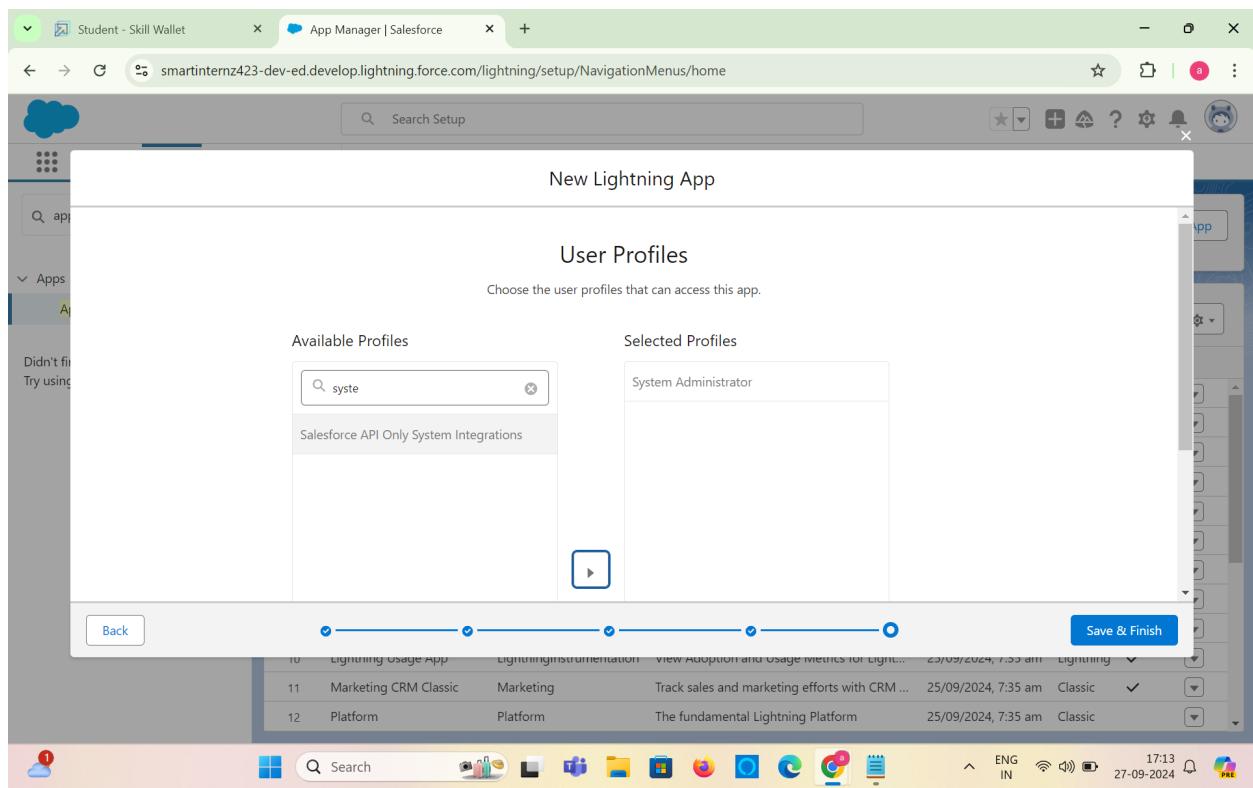
3. To Add Navigation Items.

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:



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

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.

The screenshot shows the Salesforce Setup interface with the following details:

- Page Title:** Profiles | Salesforce
- Search Bar:** Search Setup
- Left Navigation:** Users > Profiles
- Message:** Didn't find what you're looking for? Try using Global Search.
- Header:** Profiles
- Actions:** All Profiles, Edit, Delete, Create New View
- Table:** A list of profiles with columns: Action, Profile Name, User License, and Custom. The table includes rows for Salesforce API Only..., Silver Partner User, Solution Manager, Standard Platform User, Standard User, Store Supervisor (which is selected), and System Administrator.
- Page Footer:** Page 1 of 7, Previous, Next, ENG IN, 17:16, 27-09-2024

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

The screenshot shows the Salesforce Setup interface under the Profiles section. In the 'Custom Object Permissions' section, the 'Data Administration' row is selected. For the 'Consultants' object, 'Read', 'Create', 'Edit', 'Delete', 'View All', and 'Modify All' checkboxes are checked. For 'Others', 'Our Customers', and 'Retailers', the 'View All' and 'Modify All' checkboxes are checked. Other objects like Locations, Location Groups, Location Group Assignments, Macros, Work Types, and Work Type Groups have their respective checkboxes checked in the 'Basic Access' and 'Data Administration' rows.

3. Click on Save.

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

The screenshot shows the Salesforce Setup interface under the Profiles section, specifically for the 'Billing Operator' profile. The 'Profile Detail' section shows the profile's name as 'Billing Operator', user license as 'Salesforce Platform', and a 'Custom Profile' checkbox checked. The 'Page Layouts' section lists standard object layouts for Global, Email Application, and Home Page Layout, along with their corresponding lead and location layouts. The bottom right corner shows the system status bar with the date and time.

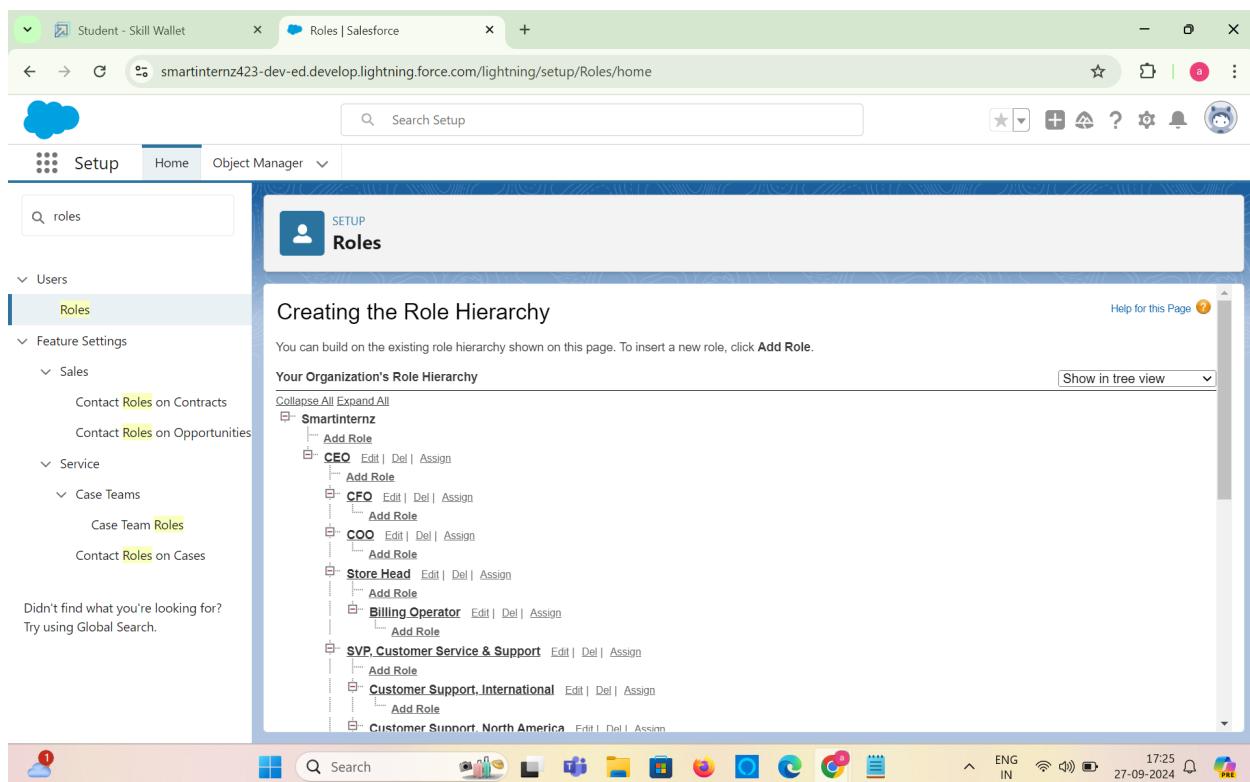
7. Setup Roles

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

7.1. 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 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 screenshot shows the Salesforce Setup interface. The left sidebar is titled 'Users' and has 'Roles' selected. The main area is titled 'Role Edit New Role'. The 'Role Edit' section contains the following fields:

- Label: Store Head
- Role Name: Store_Head
- This role reports to: CEO
- Role Name as displayed on reports: (empty)

At the bottom of the form are three buttons: Save, Save & New, and Cancel.

The screenshot shows the Salesforce Setup interface. The left sidebar is titled 'Users' and has 'Roles' selected. The main area is titled 'Role Edit New Role'. The 'Role Edit' section contains the following fields:

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

At the bottom of the form are three buttons: Save, Save & New, and Cancel.

The screenshot shows the Salesforce Setup interface for managing Roles. The left sidebar navigation includes 'Users' (with 'Roles' selected), 'Feature Settings', 'Sales' (with 'Contact Roles on Contracts' and 'Contact Roles on Opportunities'), 'Service' (with 'Case Teams' and 'Case Team Roles'), and 'Case' (with 'Contact Roles on Cases'). A search bar at the top right says 'Search Setup'. The main content area is titled 'SETUP Roles' and displays a tree view of roles under 'ASW ROLE'. The roles listed are:

- CEO**: Edit | Del | Assign
└ Add Role
- CFO**: Edit | Del | Assign
└ Add Role
- COO**: Edit | Del | Assign
└ Add Role
- Store Head**: Edit | Del | Assign
└ Add Role
- Billing Operator**: Edit | Del | Assign
└ Add Role
- SVP, Customer Service & Support**: Edit | Del | Assign
└ Add Role
- Customer Support, International**: Edit | Del | Assign
└ Add Role
- Customer Support, North America**: Edit | Del | Assign
└ Add Role
- Installation & Repair Services**: Edit | Del | Assign
└ Add Role
- SVP, Human Resources**: Edit | Del | Assign
└ Add Role
- SVP, Sales & Marketing**: Edit | Del | Assign
└ Add Role
- VP International Sales**: Edit | Del | Assign

At the bottom of the screen, the Windows taskbar shows various pinned apps like File Explorer, Task View, and Edge, along with system icons for battery, signal, and volume.

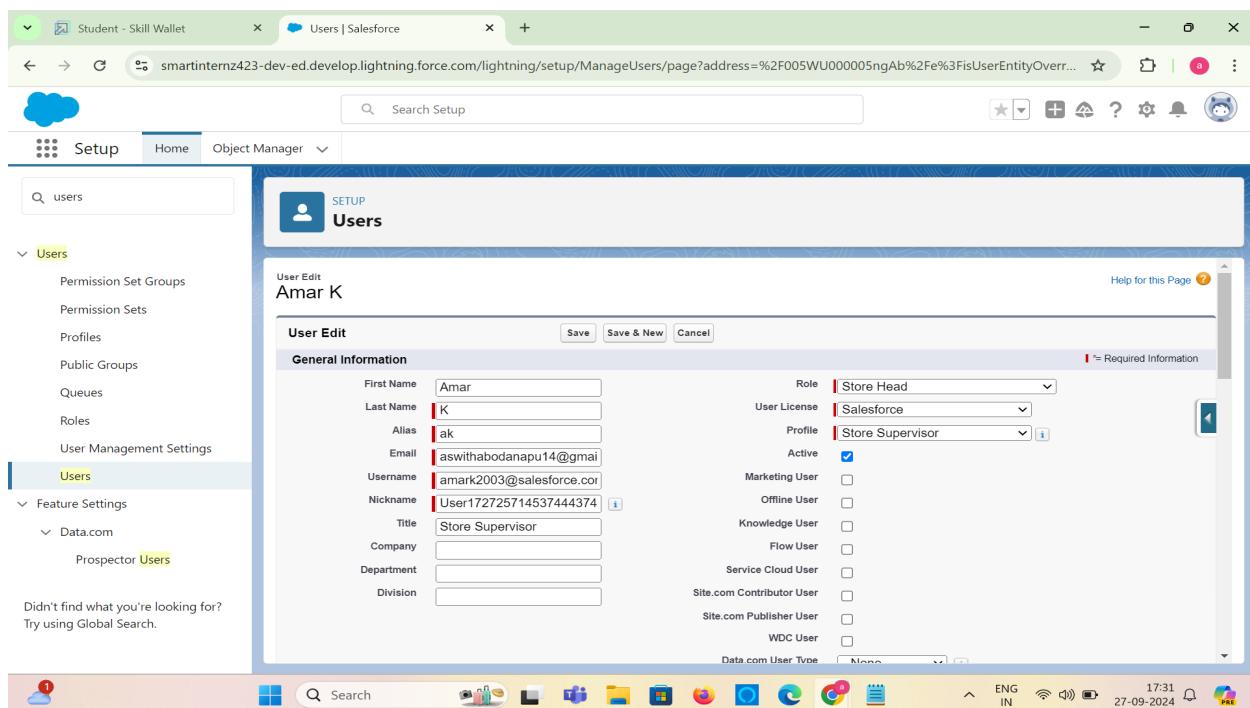
8.Users

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.

8.1.Creating a Users:

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.

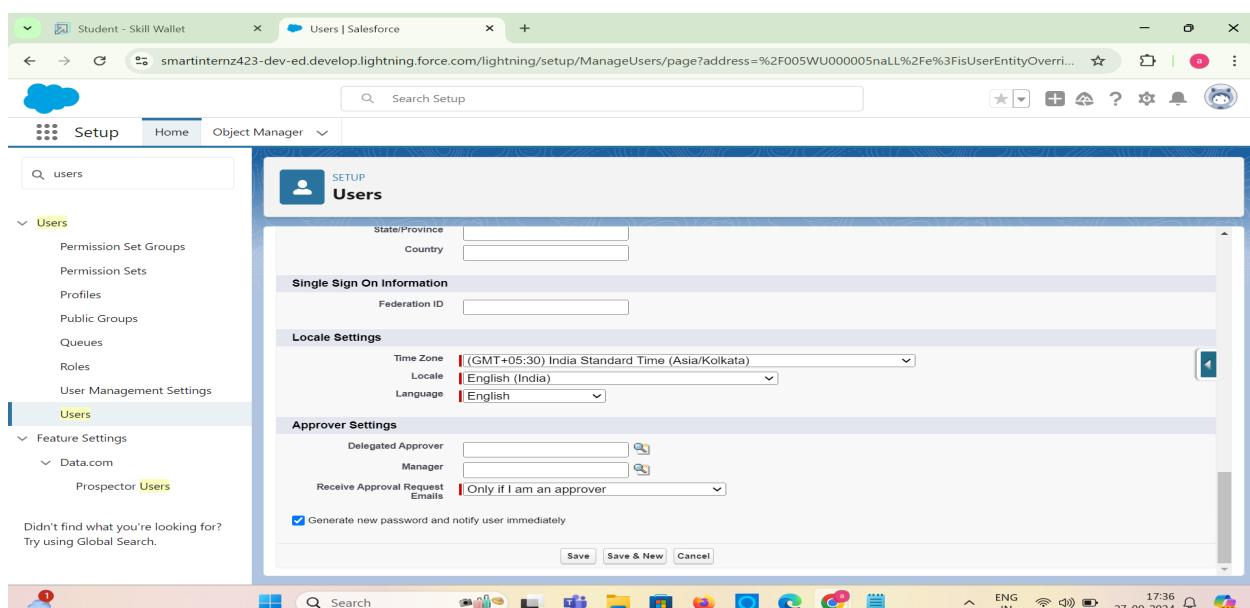
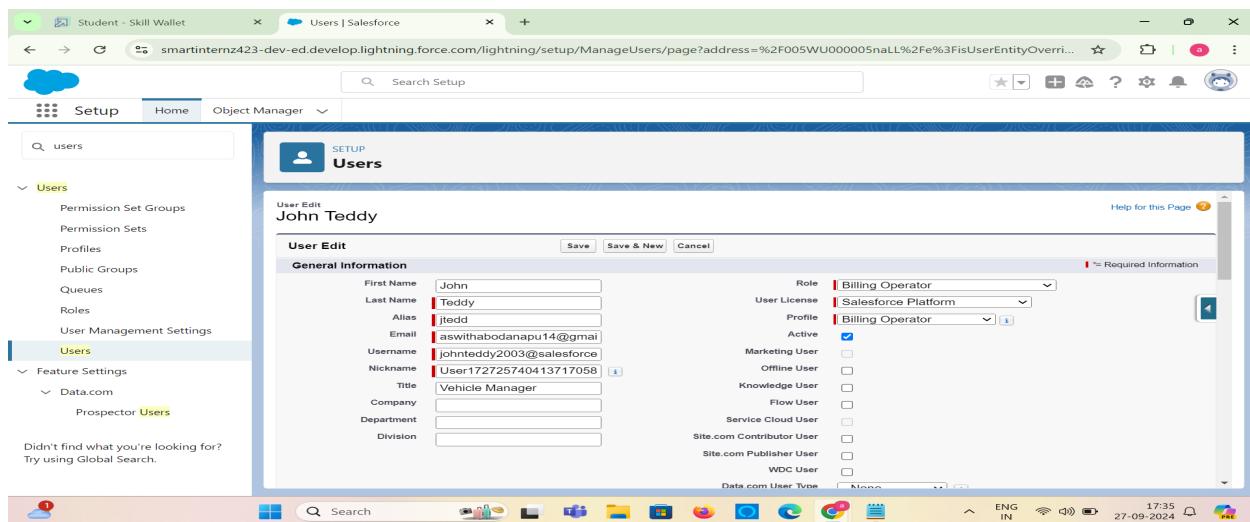
Fill in the fields (first name, last name, alias, email id, username, nick name, role, user licence, profiles) --> save.



8.2.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 John Teddy 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(Billing Operator)
5. Select a User Licence 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.

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

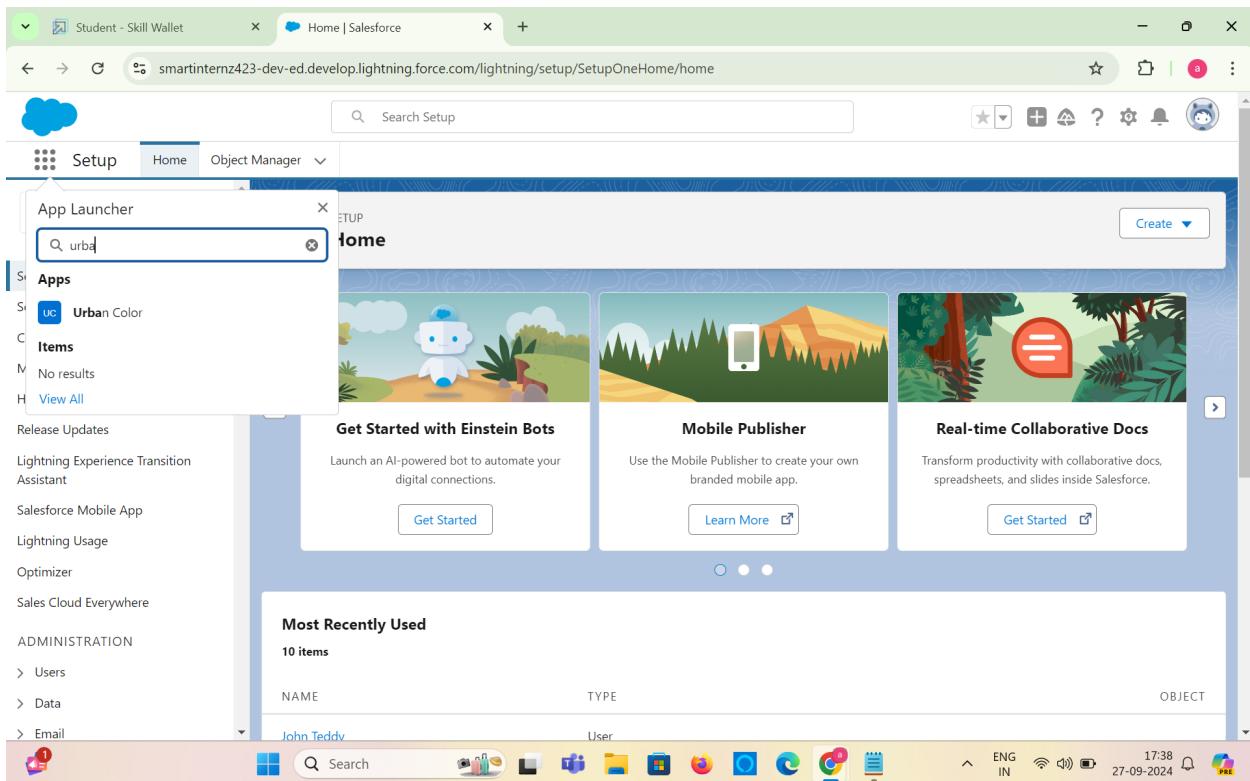


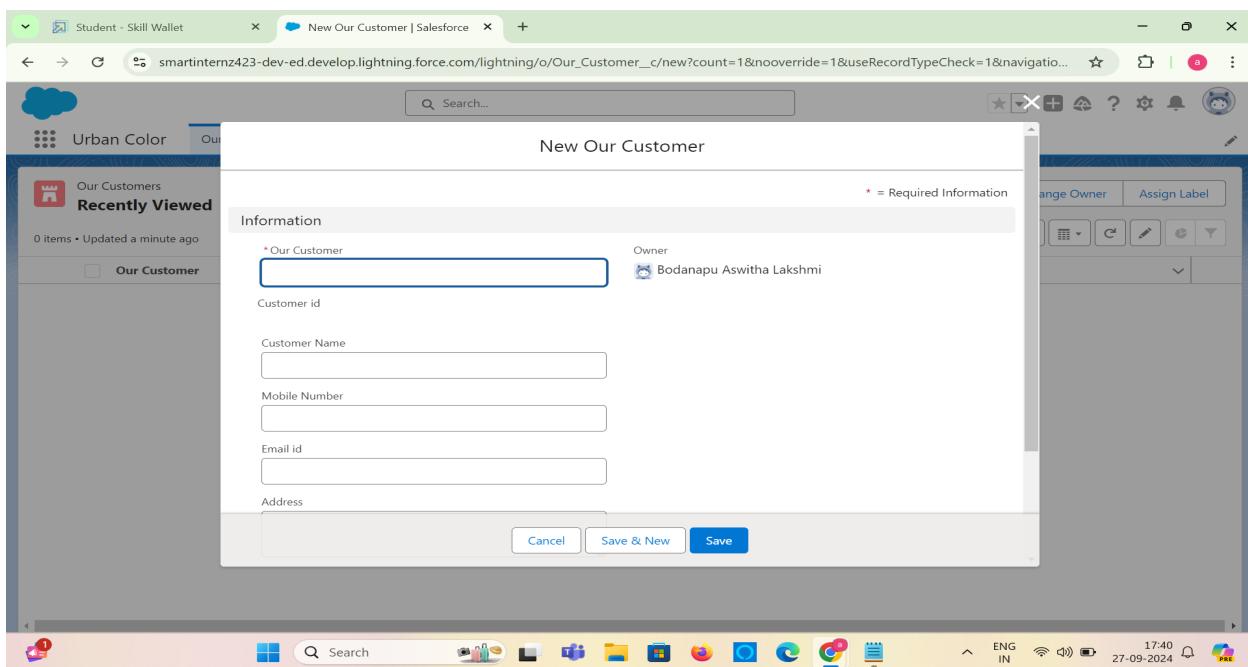
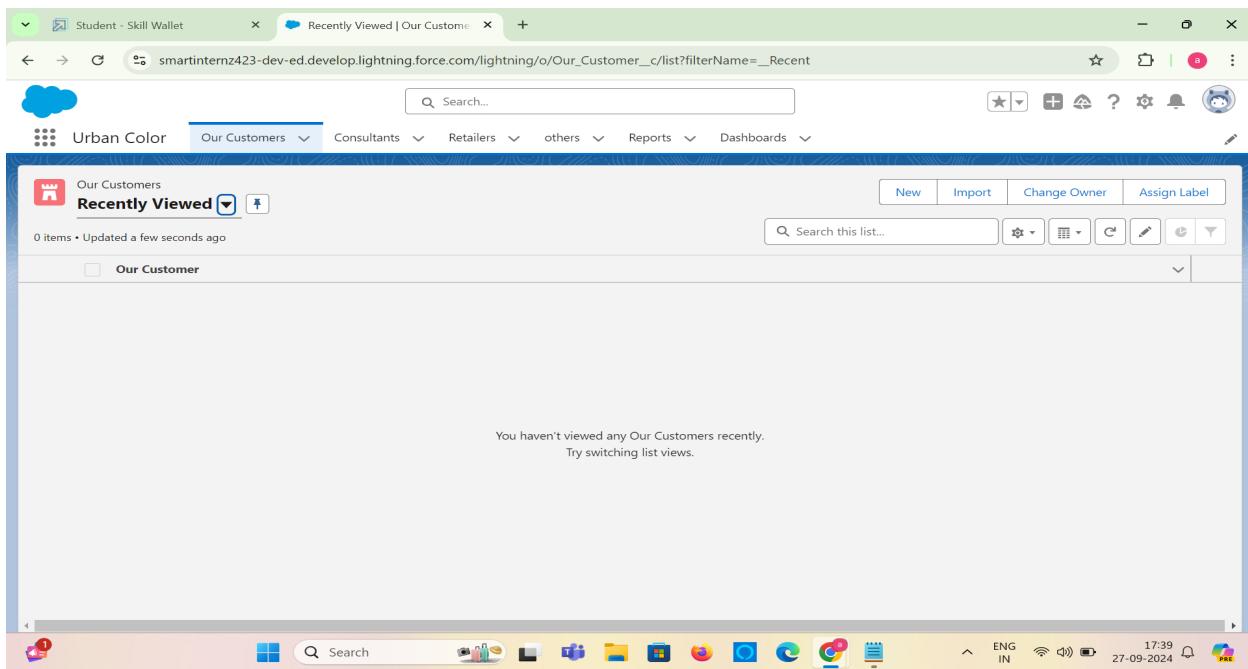
9.User Adoption

We need to understand user adoption and navigation. How to interact with database and their records.

9.1.Create Our Customer Record

1. Click on App Launcher on left side of screen.
2. Search Urban Color & click on it.
3. Click on Our Customer tab.
4. Click new button
5. Fill all Our Customer record details.
6. Click on Save Button.





9.2. View Record (Our Customer)

View Record (Our Customer):

1. Click on App Launcher on the left side of the screen.

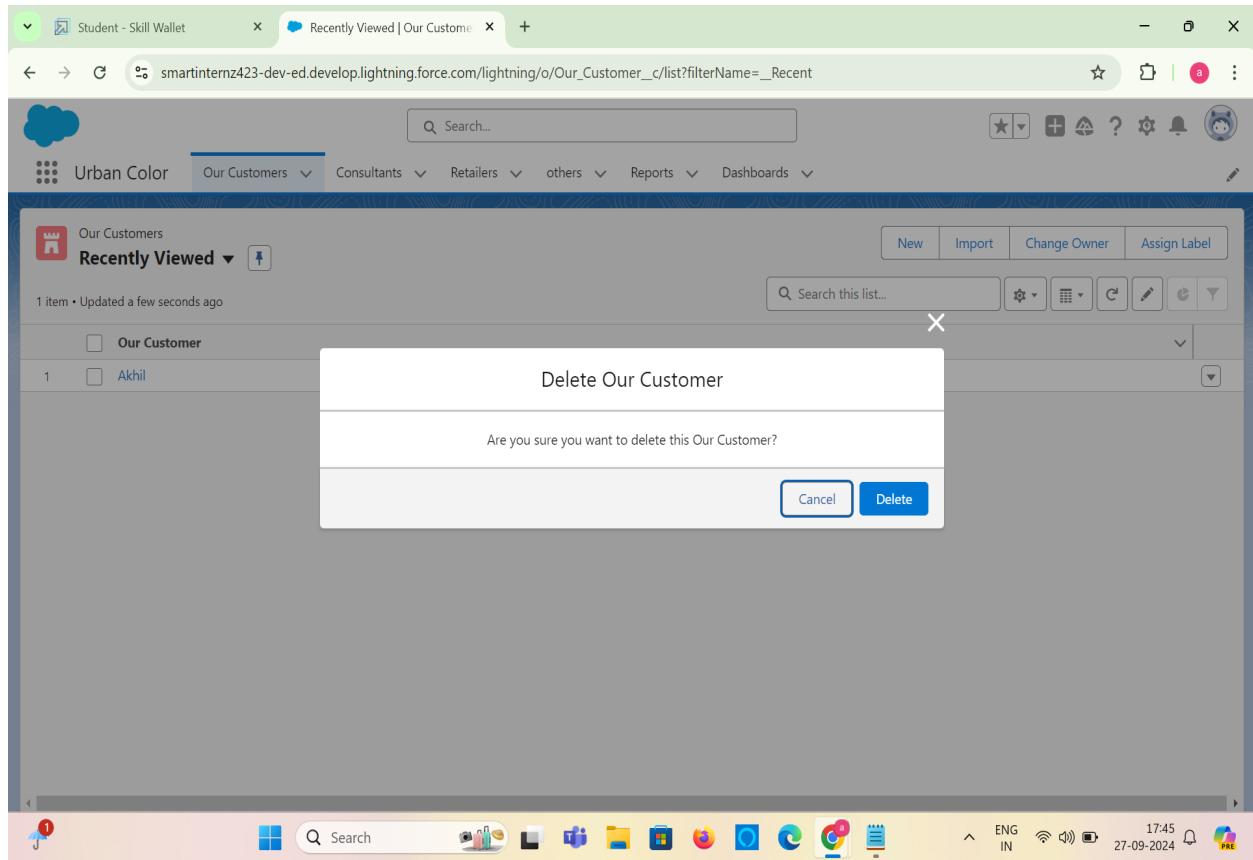
2. Search Urban Color & click on it.
3. Click on Our Customer Tab.
4. Click on any record name. you can see the details of the Our Customer.\

The screenshot shows the Salesforce Lightning interface. At the top, there are two tabs: "Student - Skill Wallet" and "Akhil | Our Customer | Salesforce". The URL in the address bar is "smartinternz423-dev-ed.lightning.force.com/lightning/r/Our_Customer_c/a00WU00000GLmJtYAL/view". The main header has a cloud icon and the text "Urban Color". Below the header, there's a navigation bar with links: "Our Customers", "Consultants", "Retailers", "others", "Reports", and "Dashboards". The main content area is titled "Our Customer Akhil". It has two tabs: "Related" and "Details", with "Details" being active. The "Details" tab contains fields for "Customer Name" (Akhil), "Customer id" (2), "Mobile Number" (8639733248), "Email id" (akhil@gmail.com), "Address" (Proddatur), and "Additional Information". Above these fields, it shows "Owner" (Bodanapu Aswitha Lakshmi). At the bottom of the content area, it shows "Created By" (Bodanapu Aswitha Lakshmi, 27/09/2024, 5:43 pm) and "Last Modified By" (Bodanapu Aswitha Lakshmi, 27/09/2024, 5:43 pm). The bottom right corner of the interface shows the date (27-09-2024), time (17:43), and language (ENG IN). The bottom of the screen shows the Windows taskbar with pinned icons for File Explorer, Edge, and other applications.

9.3.Delete Record (Our Customer)

Delete Record (Our Customer):

1. Click on App Launcher on the left side of the screen.
2. Search Urban Color & click on it.
3. Click on Our Customer Tab.
4. Click on Arrow at right hand side on that Particular record.
5. Click delete and delete again.

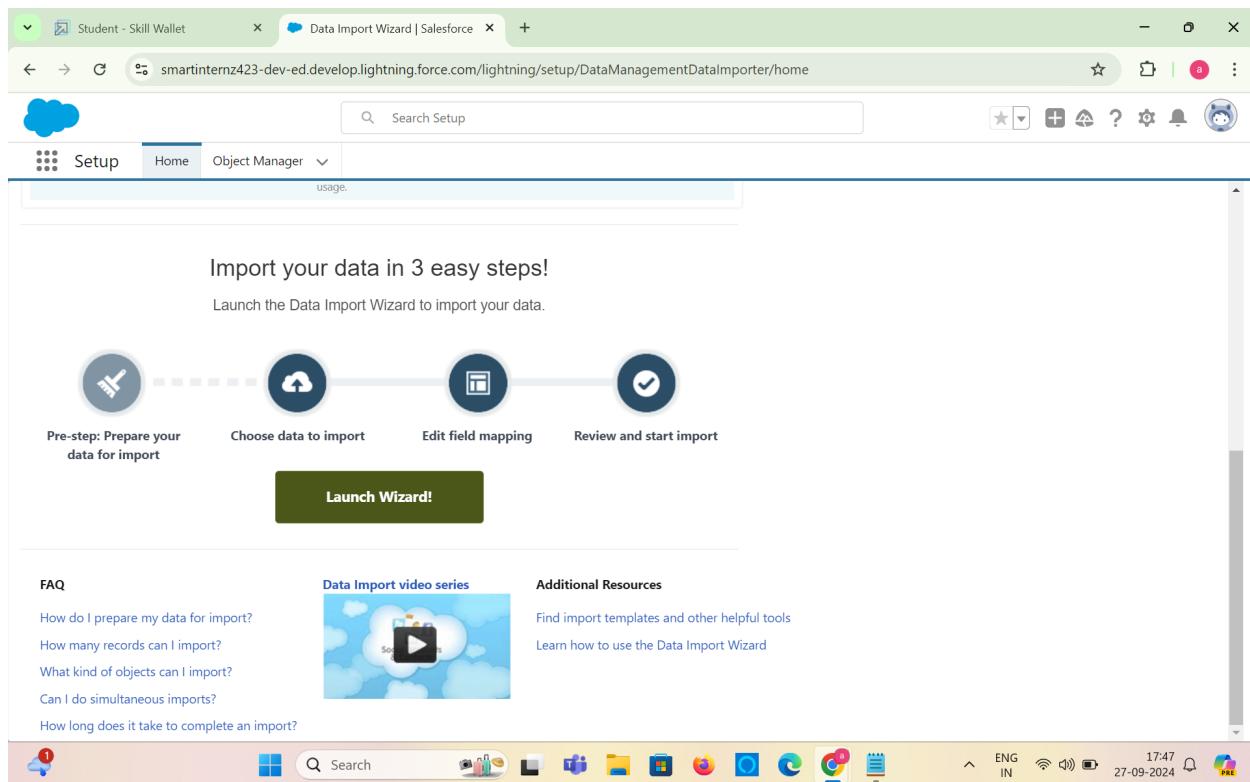


10.Import Data

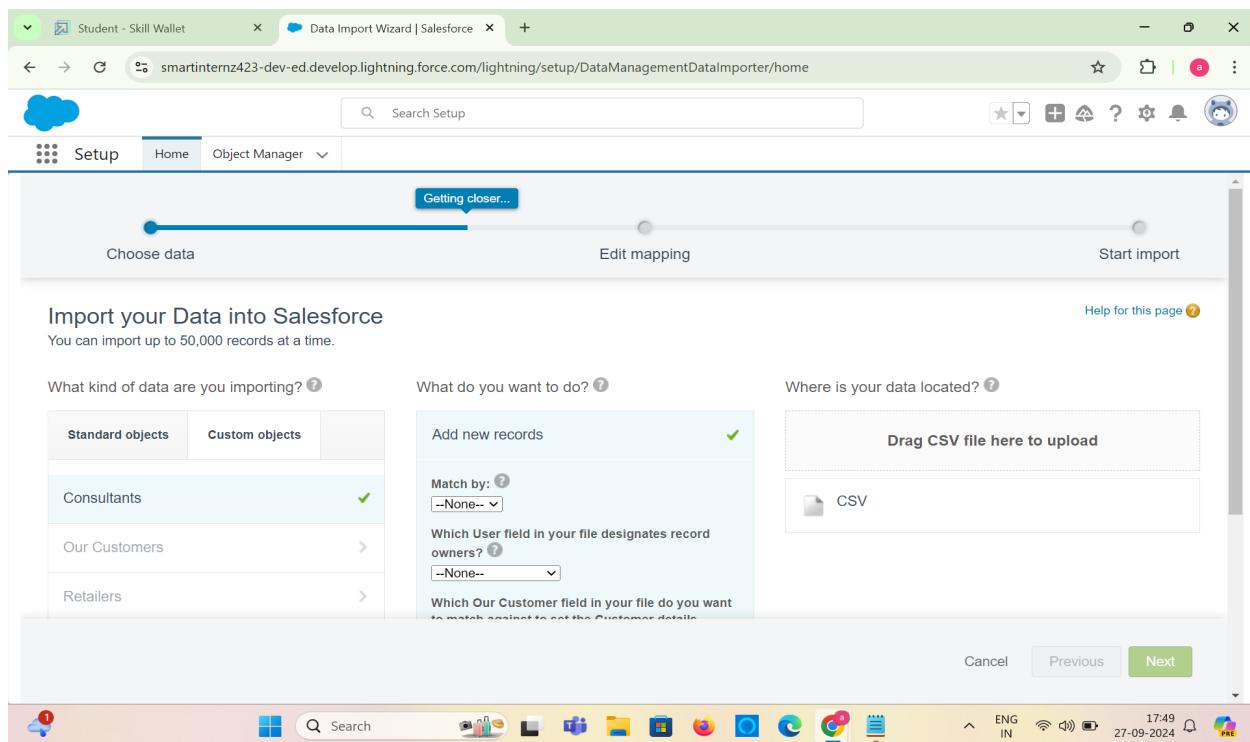
Data Import Wizard—this tool, accessible through the Setup menu, lets you import data in common standard objects, such as contacts, leads, accounts, as well as data in custom objects.

10.1.To Import Data

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



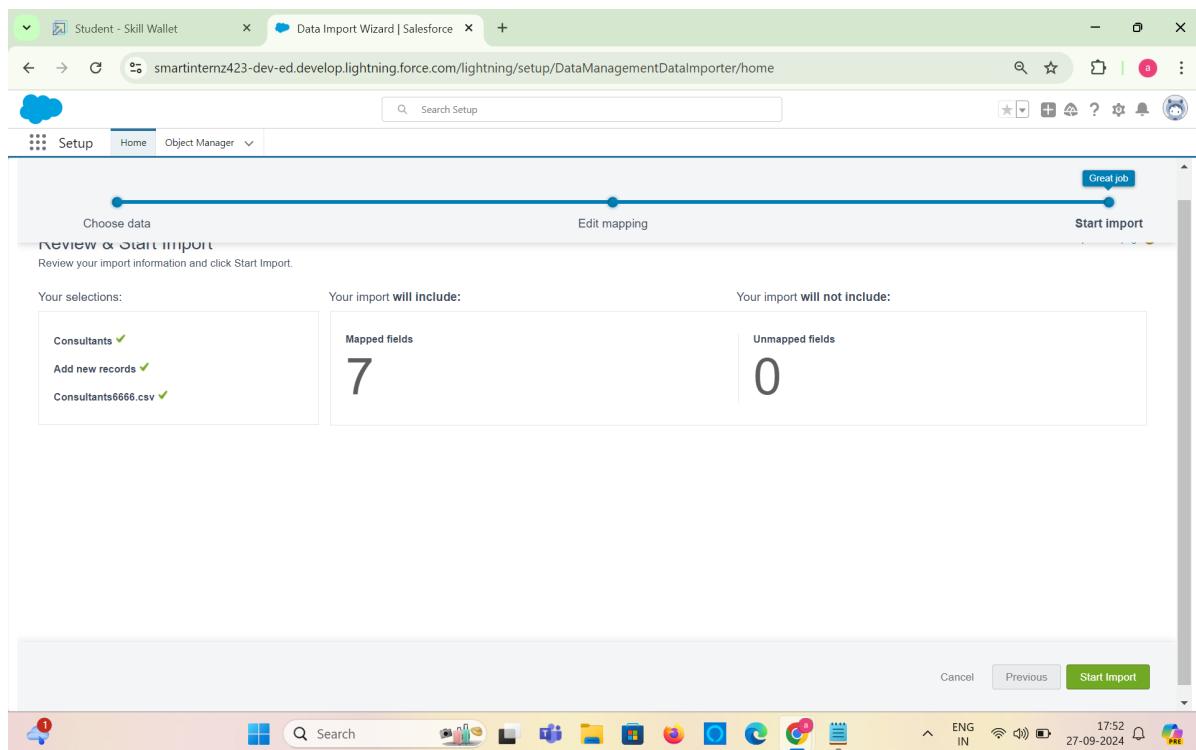
4. Click the Custom Objects tab and select the Consultant object.
5. Select Add new records.
6. Click CSV and choose file Consultant_CS1 which we made earlier. Click Next.



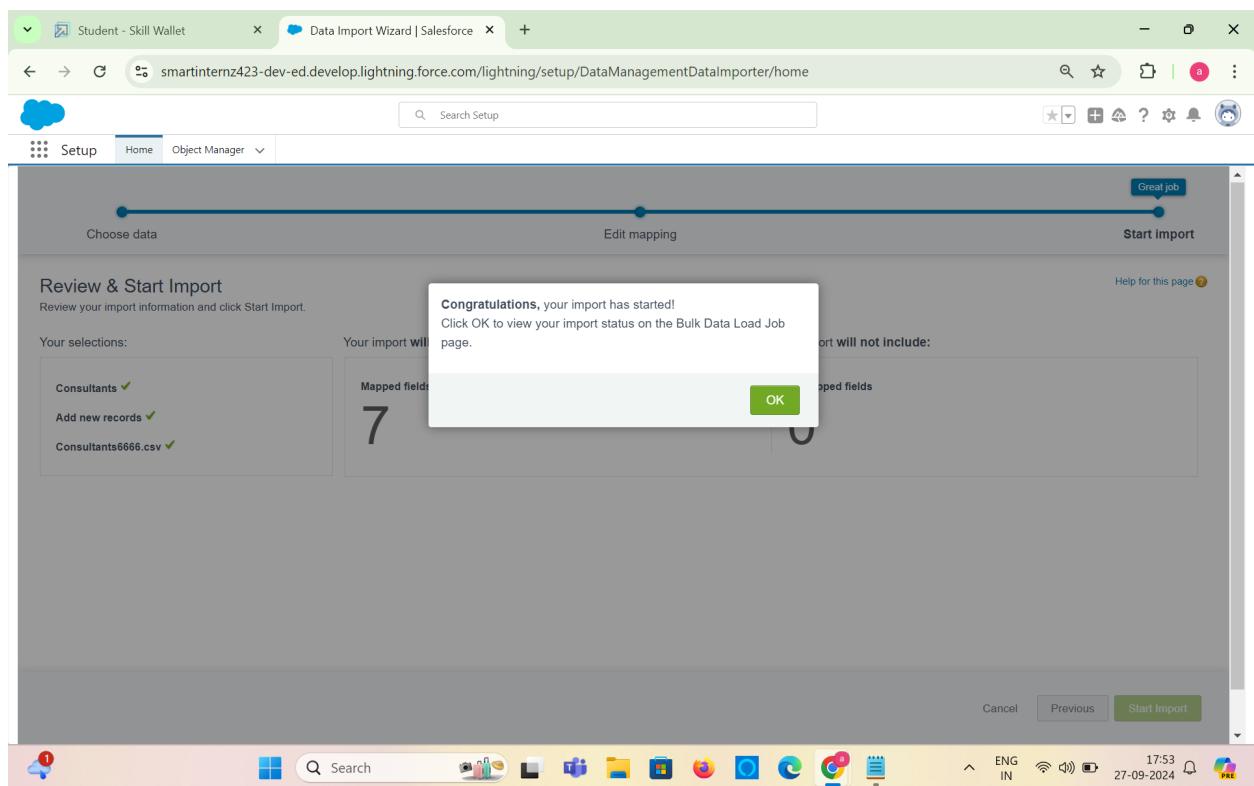
7. Since the field names in the CSV file (CSV Header) are the same as the field names in your object (Mapped Salesforce Object), the fields are automatically mapped. Click Next.

Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	Customer 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	Mumbai	Hyderabad	Delhi
Change	Products	Products	Lipstick	Compact	FacePack
Change	Payment	Payment	Cash	UPI	Credit Card
Change	Email Id	Email		ajith@gmail.com	Babu34@gmail.com

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



9. Click OK on the popup



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

The screenshot shows the Salesforce Setup interface with the title "Bulk Data Load Jobs". The page displays the details of a bulk data load job. Key information includes:

- Job ID:** 750WU000007nohB
- Submitted By:** Bodanapu Aswitha Lakshmi
- Job Type:** Bulk V1
- Operation:** Insert
- Status:** Closed
- Total Processing Time (ms):** 41
- API Active Processing Time (ms):** 5
- Apex Processing Time (ms):** 0

Job statistics:

- Start Time:** 27/09/2024, 5:53 pm IST
- End Time:** 27/09/2024, 5:53 pm IST
- Time to Complete (hh:mm:ss):** 00:01
- Object:** Consultant
- External ID Field:** (empty)
- Content Type:** CSV
- Concurrency Mode:** Parallel
- API Version:** 61.0

Progress and records processed:

- Completed Batches:** 1
- Failed Batches:** 0
- Progress:** 100%
- Records Processed:** 9
- Records Failed:** 9
- Retries:** 0

Batches table:

View Request	View Result	Batch ID	Start Time	End Time	Total Processing Time (ms)	API Active Processing Time (ms)	Apex Processing Time (ms)	Records Processed	Records Failed	Retry Count	State Message	Status
View Request	View Result	751WU000004uxv	27/09/2024, 5:53 pm	27/09/2024, 5:53 pm	41	5	0	9	9	0	Completed	

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

Note - Do Field mapping carefully.

11.What are Reports?

Reports:

Reports in Salesforce is a list of records that meet a particular criterion which gives an answer to a particular question. These records are displayed as a table that can be filtered or grouped based on any field.

There are 4 types of report formats in Salesforce:

1. Tabular Reports:

This is the most basic report format. It just displays the row of records in a table with a grand total. While easy to set up they can't be used to create groups of data or charts and also cannot be used in Dashboards. They are mainly used to generate a simple list or a list with a grand total.

2. Summary Reports:

It is the most commonly used type of report. It allows grouping of rows of data, view subtotal, and create charts.

3. Matrix Report:

It is the most complex report format. Matrix report summarizes information in a grid format. It allows records to be grouped by both columns and rows. It can also be used to generate dashboards. Charts can be added to this type of report.

4. Joined Reports:

These types of reports let us create different views of data from multiple report types. The data is joined reports are organized in blocks. Each block acts as a subreport with its own fields, columns, sorting, and filtering. They are used to group and show data from multiple report types in different views.

Report types:

Report type determines which set of records will be available in a report. Every report is based on a particular report type. The report type is selected first when we create a report. Every report type has a primary object and one or more related objects. All these objects must be linked together either 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:

Standard Report Types are automatically included with standard objects and also with custom objects where "Allow Reports" is checked.

Standard report types cannot be customized and automatically include standard and custom fields for each object within the report type. Standard report types get created when an object is created, also when a relationship is created.

Note: Standard report types always have inner joins.

2. Custom Report Types:

Custom report types are reporting templates created to streamline the reporting process. Custom Reports are created by an administrator or User with “Manage

3. Custom Report Types” permission. Custom report types are created when standard report types cannot specify which records will be available on reports.

In custom report types we can specify objects which will be available in a particular report. The primary object must have a relationship with other objects present in a report type either directly or indirectly.

There are 3 types of access levels of folders:

1. Viewer:

With this access level, users can see the data in a report but cannot make any changes except cloning it into a new report.

2. Editor:

With this access level, users can view and modify the reports it contains and can also move them to/from any other folders they have access level as Editor or Manager.

3. Manager:

With this access level, users can do everything Viewers & Editors can do, plus they can also control other user's access levels to this folder. Also, users with Manager Access levels can delete the report.

11.1.Create Report

1.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 – Consultant Name, 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.

The screenshot shows the Salesforce Report Builder interface. The report is titled "New Consultants Report" and is set to the "Consultants" tab. The left sidebar shows "Fields > Outline" and "Filters". The main area displays a table with the following data:

Payment	Consultant: Consultants	Customer Name	Delivery Type	Products
Debit Card (4)	Chitra	-	Courier	Eyeliner
	Ajay Kumar	-	Courier	Lip Balm
	Chitra	-	Courier	Eyeliner
Credit Card (2)	Ajay Kumar	-	Courier	Lip Balm
	Babu	-	Self Pickup	FacePack
UPI (8)	Babu	-	Self Pickup	FacePack
	Ajith	-	Courier	Compact
	Swathi	-	Courier	Nail Polish
	Prasad	-	Self Pickup	Eyeliner
	Sandeep	-	Courier	Eyeliner
	Ajith	-	Courier	Compact
	Swathi	-	Courier	Nail Polish
	Prasad	-	Self Pickup	Eyeliner
Cash (4)	Sandeep	-	Courier	Eyeliner
	Dev Raj	-	Self Pickup	Lipstick
	Shankar	-	Self Pickup	FacePack

At the bottom, there are buttons for "Row Counts", "Detail Rows", "Subtotals", and "Grand Total". The status bar at the bottom right shows "18:05", "27-09-2024", and other system icons.

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.

Total Records
18

Payment Type	Consultant: Consultants	Consultant: Owner Name	Delivery Type	Products	Payment
Net Banking (14)	Ajith	Bodanapu Aswita Lakshmi	Courier	Compact	UPI
	Babu	Bodanapu Aswita Lakshmi	Self Pickup	FacePack	Credit Card
	Chitra	Bodanapu Aswita Lakshmi	Courier	Eyeliner	Debit Card
	Swathi	Bodanapu Aswita Lakshmi	Courier	Nail Polish	UPI
	Prasad	Bodanapu Aswita Lakshmi	Self Pickup	Eyeliner	UPI
	Ajay Kumar	Bodanapu Aswita Lakshmi	Courier	Lip Balm	Debit Card
	Sandeep	Bodanapu Aswita Lakshmi	Courier	Eyeliner	UPI
	Ajith	Bodanapu Aswita Lakshmi	Courier	Compact	UPI
	Babu	Bodanapu Aswita Lakshmi	Self Pickup	FacePack	Credit Card
	Chitra	Bodanapu Aswita Lakshmi	Courier	Eyeliner	Debit Card
	Swathi	Bodanapu Aswita Lakshmi	Courier	Nail Polish	UPI
	Prasad	Bodanapu Aswita Lakshmi	Self Pickup	Eyeliner	UPI
	Ajay Kumar	Bodanapu Aswita Lakshmi	Courier	Lip Balm	Debit Card
	Sandeep	Bodanapu Aswita Lakshmi	Courier	Eyeliner	UPI
Subtotal					
Cash (4)	Dev Raj	Bodanapu Aswita Lakshmi	Self Pickup	Lipstick	Cash
	Shankar	Bodanapu Aswita Lakshmi	Self Pickup	FacePack	Cash
	Dev Raj	Bodanapu Aswita Lakshmi	Self Pickup	Lipstick	Cash

Row Counts Detail Rows Subtotals Grand Total

11.2. View Report

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

REPORTS

Recent

1 item

Report Name	Description	Folder	Created By	Created On	Subscribed
Consultant report	Private Reports	Bodanapu Aswita Lakshmi	27/9/2024, 12:58 pm		

CREATED BY ME

PRIVATE REPORTS

PUBLIC REPORTS

ALL REPORTS

FOLDERS

ALL FOLDERS

CREATED BY ME

SHARED WITH ME

FAVORITES

ALL FAVORITES

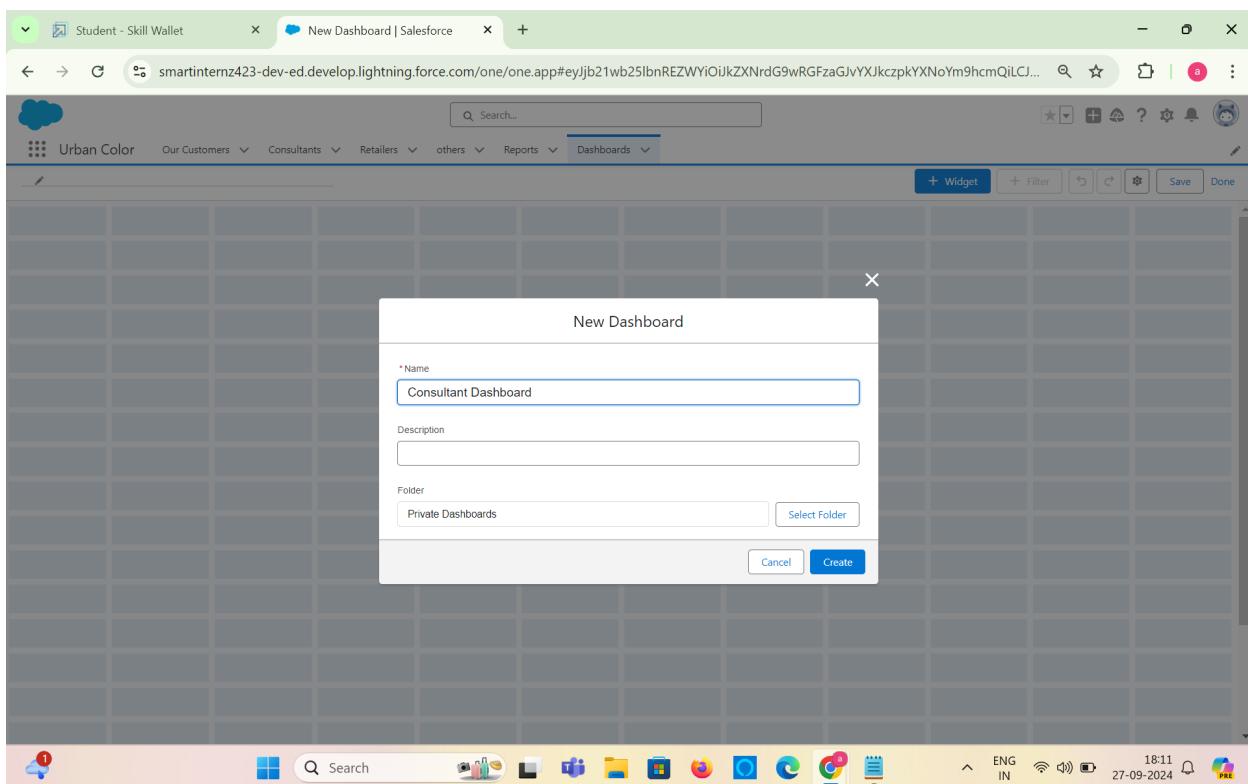
Roll No:21121A2905

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. 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.
- 10.Click save.



The screenshot shows a Salesforce Lightning dashboard titled "Consultant Dashboard". At the top, there's a navigation bar with links for "Urban Color", "Our Customers", "Consultants", "Retailers", "others", "Reports", and "Dashboards". A search bar is also present. Below the header, it says "As of 27-Sept-2024, 6:11 pm Viewing as Bodanapu Aswitha Lakshmi". The main content area features a chart titled "Consultant report" with the subtitle "Record Count". The chart compares two payment types: "Net Banking" (14 records) and "Cash" (4 records). The Y-axis is labeled "Payment Type" and the X-axis is labeled "Record Count" with ticks at 0, 2, 4, 6, 8, 10, 12, and 14. A "View Report (Consultant report)" button is located below the chart. The bottom of the screen shows a Windows taskbar with various icons and system status.

12.2. 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.

The screenshot shows the "Dashboards" page in Salesforce. On the left, there's a sidebar with sections for "Dashboards", "Recent" (1 item), "Created by Me", "Private Dashboards", "All Dashboards", "Folders", "All Folders", "Created by Me", "Shared with Me", and "Favorites", "All Favorites". The main content area displays a table of recent dashboards. The columns are: Dashboard Name, Description, Folder, Created By, Created On, and Subscribed. One entry is visible: "Consultant Dashboard" (Description: "Private Dashboards"), created by "Bodenapu Aswitha Lakshmi" on "27/9/2024, 12:59 pm". A search bar at the top right allows searching for recent dashboards. The bottom of the screen shows a Windows taskbar with various icons and system status.