

# Cosmetics Store Management

## Summary:

### 1. Key Features: Customer Management:

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

### 2. Product Management:

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

### 3. Sales Management:

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

### 4. Marketing & Promotions:

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

### 5. Customer Service:

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

### 6. Integration & Automation:

- **Salesforce Integration:** Integrate with other systems such as ERP or e-commerce platforms to ensure seamless data flow.

- **Workflow Automation:** Automate repetitive tasks and processes to increase operational efficiency and reduce manual errors

## **TASKS :**

### **1.Creating the Objects :**

To Create an object:

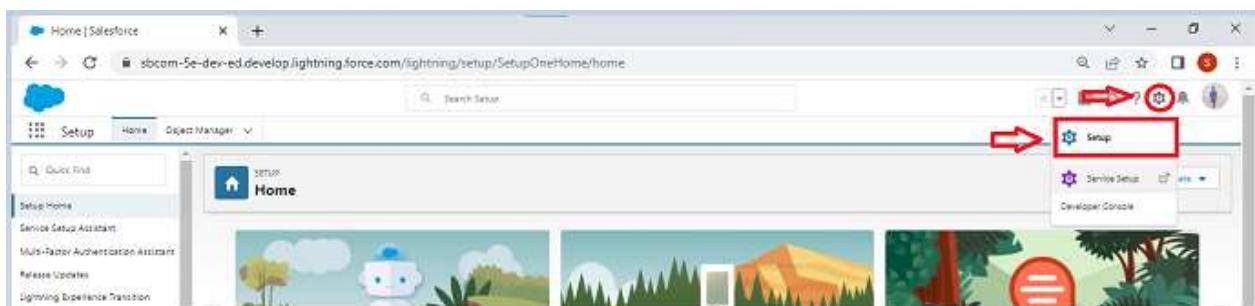
Creation of Objects for Urban Color, For this Urban Color we need to create 3 objects i.e., Our Customers, Consultants, Retailers, others.

The below steps will assist you in creating those objects.

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

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

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





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

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

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

### Task2 : Creating Fields and Relationship :

An object relationship in Salesforce is a two-way association between two objects.

Relationships are created by creating custom relationship fields on an object. This is done so that when users view records, they can also see and **access related data**.

#### **Fields in Our Customers objects :**

Fields in Our Customers objects follow below data types:

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

#### **Fields in Consultants objects**

Fields in Consultants objects follow below data 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

#### 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)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)

#### Fields in Others objects

Fields in Others objects follow below data types:

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

In the Cosmetic Store Management System built on Salesforce, fields and relationships are designed to streamline operations and enhance data management. Key fields include customer details (e.g., contact information and purchase history), product specifics (e.g., SKU, price, and inventory levels), order details (e.g., order status and shipping info), marketing campaign attributes, and case management elements. Relationships are structured to connect these fields efficiently: customers can have multiple orders and cases, each order can include multiple products, and products are linked to inventory and suppliers.

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

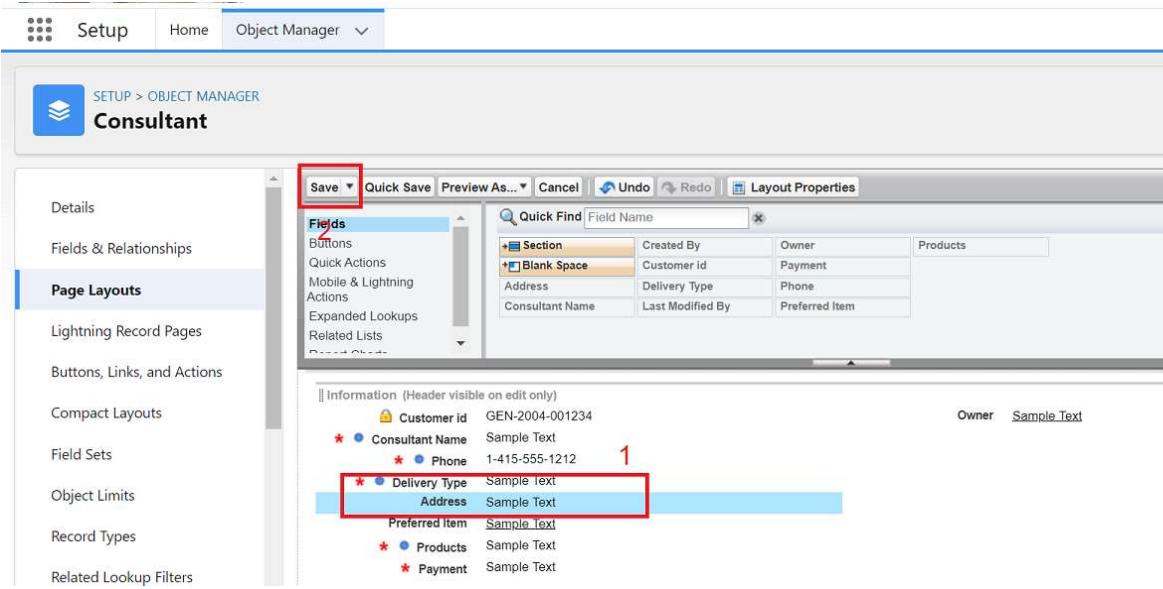
- From the Salesforce setup menu, go to "Object Manager" and select the Consultants object.
2. Click on "Page Layouts" in the left sidebar. This will display a list of available page layouts for the selected object.
  3. Select the Consultant Layout page layout.

The screenshot shows the Salesforce Object Manager interface for the 'Consultant' object. The left sidebar has 'Page Layouts' selected, indicated by a red box labeled '1'. The main area displays a table titled 'Page Layouts' with one item: 'Consultant Layout', which is highlighted with a red box labeled '2'. The table includes columns for 'PAGE LAYOUT NAME', 'CREATED BY', and 'MODIFIED BY'. The URL at the bottom of the screen is 'thesmarbridgecom2-dev-ed.develop.lightning.force.com/lightning/.../view'.

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

The screenshot shows the Salesforce Page Layout editor for the 'Consultant' object. The left sidebar has 'Page Layouts' selected. The main area shows the 'Fields' section where several fields are listed: Section, Blank Space, Address, Consultant Name, Created By, Customer Id, Owner, Products, Delivery Type, Phone, Last Modified By, Preferred Item, and Information. The 'Information' section lists fields like Customer Id, Consultant Name, Phone, Preferred Item, Products, Payment, and Delivery Type, each with sample values. A red arrow points to the 'Delivery Type' field in the 'Information' section.

5. Click on Save



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

► **Task 4 : Creation of a Lightning App:**

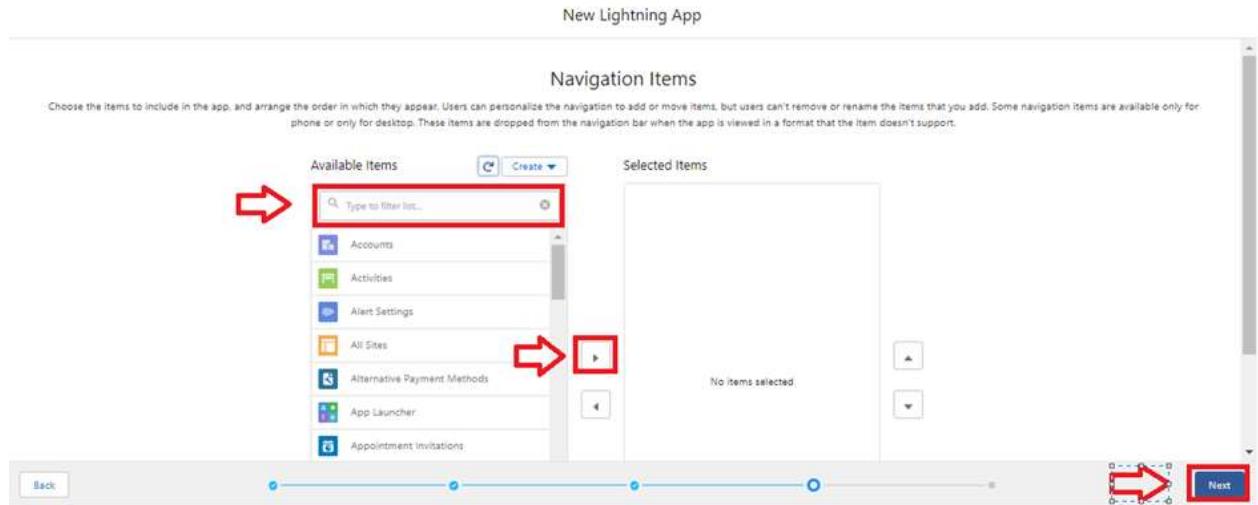
- An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar
  - To create a lightning app page:
- Go to setup page --> search “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 'app manager' typed into it. Below the search bar, there's a link labeled 'Clone Apps (Beta)'. In the top right corner, there's a prominent red box around the 'New Lightning App' button. The main area displays a list of existing apps, with columns for App Name, Developer Name, Description, Last Modified, App Type, and Version.

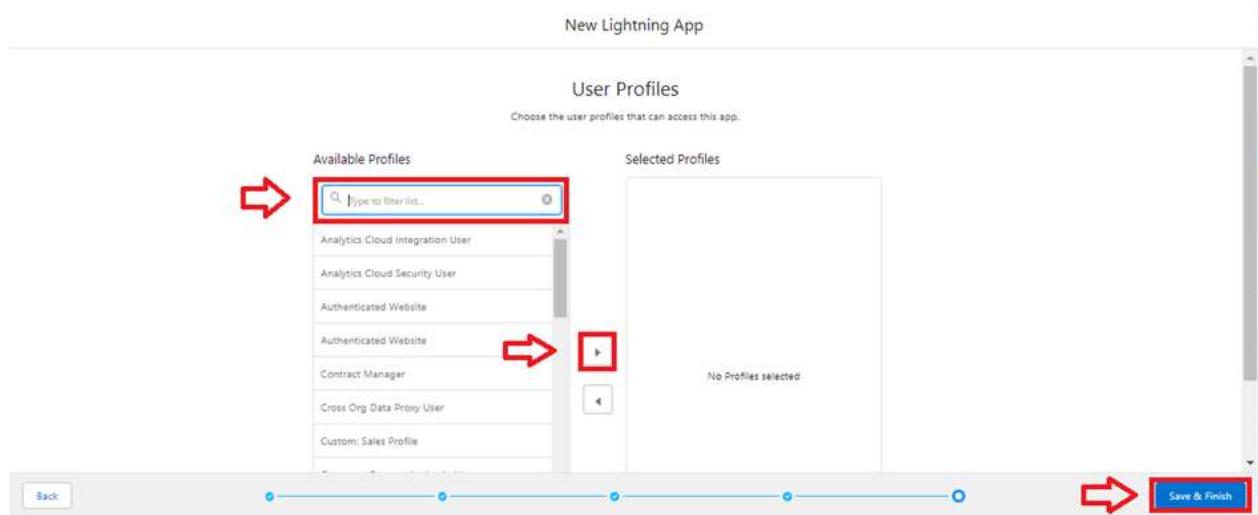
- Fill the app name as Urban Color in app details and branding --> Next --> (App option page) keep it as default --> Next --> (Utility Items) keep it as default --> Next.

This screenshot shows the 'New Lightning App' configuration page. It has two main sections: 'App Details' and 'App Branding'. In the 'App Details' section, there's a required field 'App Name' with the placeholder 'Name your app...'. In the 'App Branding' section, there's a color picker set to '#007002'. At the bottom right, there's a large red arrow pointing to the 'Next' button.

- 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.

#### ► **Task 5: Creating Profiles :**

- A profile is a group/collection of settings and permissions that define what a user can do in salesforce. A profile controls "Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges.

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

Creating a Profiles:

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

- From Setup enter Profiles in the Quick Find box, and select Profiles.
- From the list of profiles, find Standard User.

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

To create a new profile:

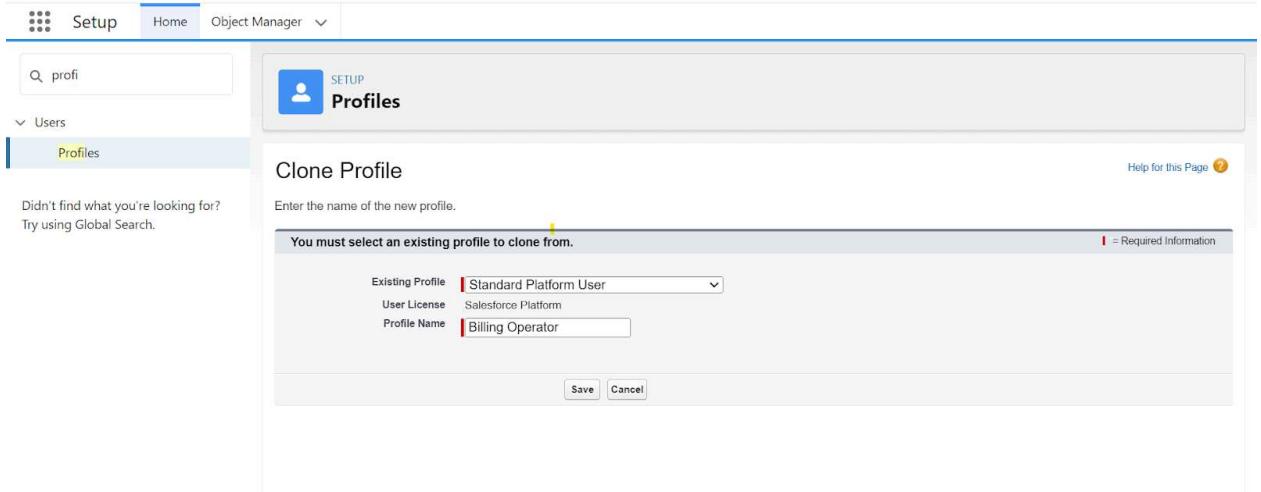
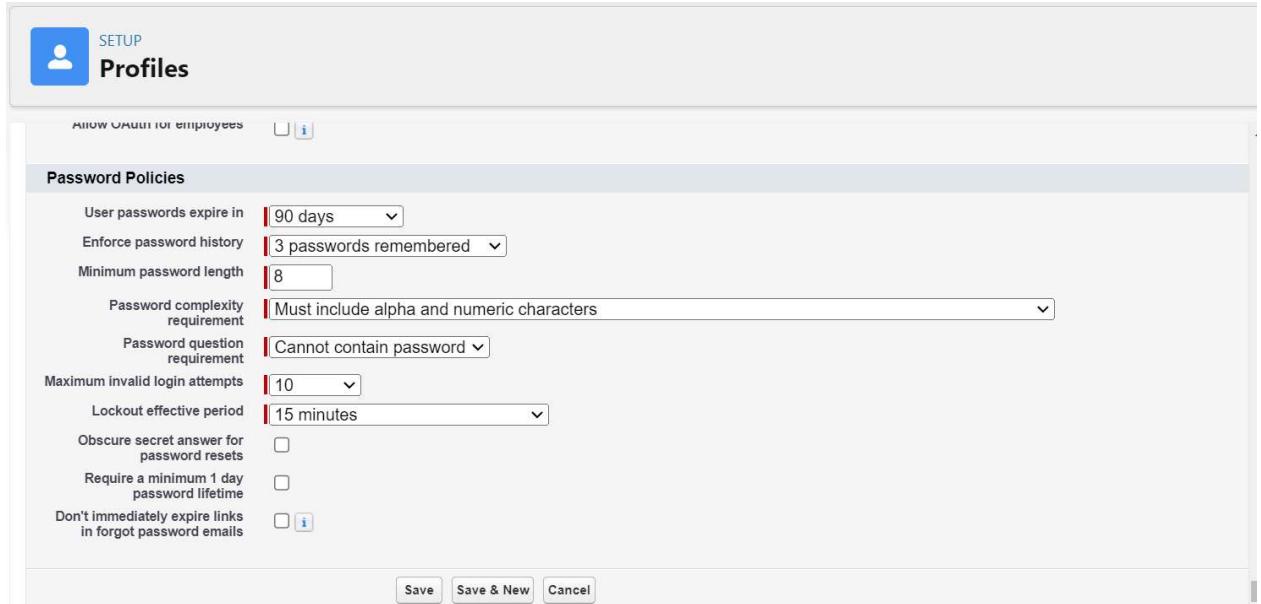
1. Go to setup --> type profiles in quick find box --> click on profiles --> clone the desired profile (standard user is preferable) --> enter profile name --> save.
2. While still on the profile page, then click Edit.

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. A search bar at the top left contains 'prof'. The main area displays a profile named 'Store Supervisor' with the following details:

- Profile Detail:**
  - Name: Store Supervisor
  - User License: Salesforce
  - Description: (empty)
  - Buttons: Edit, Clone, Delete, View Users
  - Custom Profile checkbox is checked.
- Custom Object Permissions:** A large grid of checkboxes for various objects like Community, Content, Data Manager, Digital Experiences, etc., with most being checked.
- Service Provider Access:** A section with checkboxes for Service Console, Site.com, Subscription Management, and Vehicle Management, with 'Urban Color (Urban\_Color)' checked.
- Tab Settings:** A section with a checkbox for 'Overwrite users' personal tab customizations'.

3. Click on Save.
4. Similarly Create operator profile ,Clone Salesforce Platform user and give access only for

Billing Operator.



5. Click On Save.

#### Task 6: Setting up Roles :

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

1. Click on the Gear Icon
2. Click "Setup"
3. In the Quick Find box, enter "Roles"
4. Click "Roles"
5. Click on "Set Up Roles"
6. Click "Expand All"
7. Under the CEO, click on "Add Role"
8. Fill up the Label as Store Head, Role Name Store\_Head.

9. Enter a Role name that will be displayed on Reports

10. Click on Save .

The screenshot shows the Salesforce Setup interface. The left sidebar is expanded, showing the 'Users' section with 'Roles' selected. The main area is titled 'SETUP Roles' and shows a 'Role Edit' form for a 'New Role'. The form fields are as follows:

- Label: Store Head
- Role Name: Store\_Head
- This role reports to: thesmartbridge.com
- Role Name as displayed on reports: (empty)

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

Similarly create One Roles under Store Head as Billing Operator.

The screenshot shows the Salesforce Setup interface. The left sidebar is expanded, showing the 'Users' section with 'Roles' selected. The main area is titled 'SETUP Roles' and shows a 'Role Edit' form for a 'New Role'. The form fields are as follows:

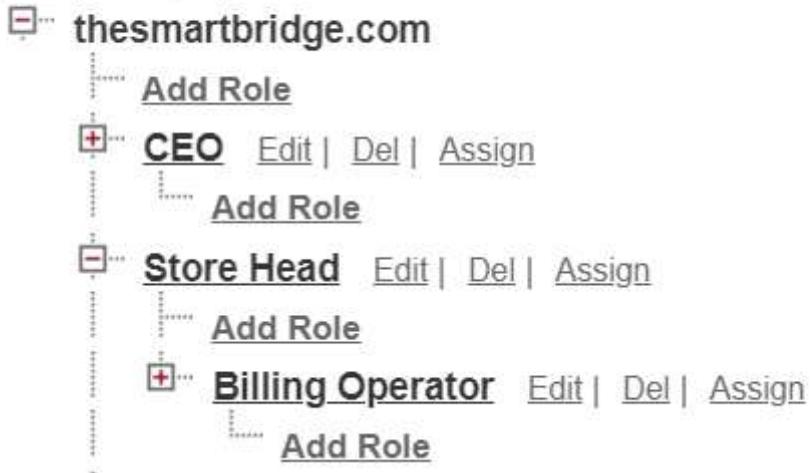
- Label: Billing Operator
- Role Name: Billing\_Operator
- This role reports to: Store Head
- Role Name as displayed on reports: (empty)

At the bottom right of the form are three buttons: 'Save', 'Save & New', and 'Cancel'. A 'Help for this Page' link is visible in the top right corner of the form area. Below the form, a message says: "Didn't find what you're looking for? Try using Global Search."

## Your Organization's Role Hierarchy

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



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

### ► **Task 7 : Creation of an User :**

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

login name and a temporary password emailed to your email.

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

The image contains two screenshots of the Salesforce Setup interface, both titled "SETUP Users".

**User Edit Page:** This page shows the "User Edit" form for a user named "Amar". The "General Information" section includes fields for First Name (Amar), Last Name (k), Alias (ak), Email (mailid@gmail.com), Username (amarck2133@salesforce.com), Nickname (User167161323313747430), Title (Store Supervisor), Company ( ), Department ( ), and Division ( ). The "Role" is set to "Store Head", "User License" to "Salesforce", and "Profile" to "Store Supervisor". The "Active" checkbox is checked. Other optional checkboxes like Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, and Data.com User Type are all unchecked. A note indicates that the "Role" field is required.

**Single Sign On Information Page:** This page shows the "Single Sign On Information" settings. It includes sections for "Federation ID" (empty), "Locale Settings" (Time Zone: (GMT-07:00) Pacific Daylight Time (America/Los\_Angeles), Locale: English (United States), Language: English), and "Approver Settings" (Delegated Approver and Manager fields, "Receive Approval Request Emails" dropdown set to "Only if I am an approver", and a checkbox for "Generate new password and notify user immediately").

### Task 8 : Creating/Modifying Records :

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

## **Steps to Create a Record:**

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

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

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

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

### **► Task 9: Importing Data :**

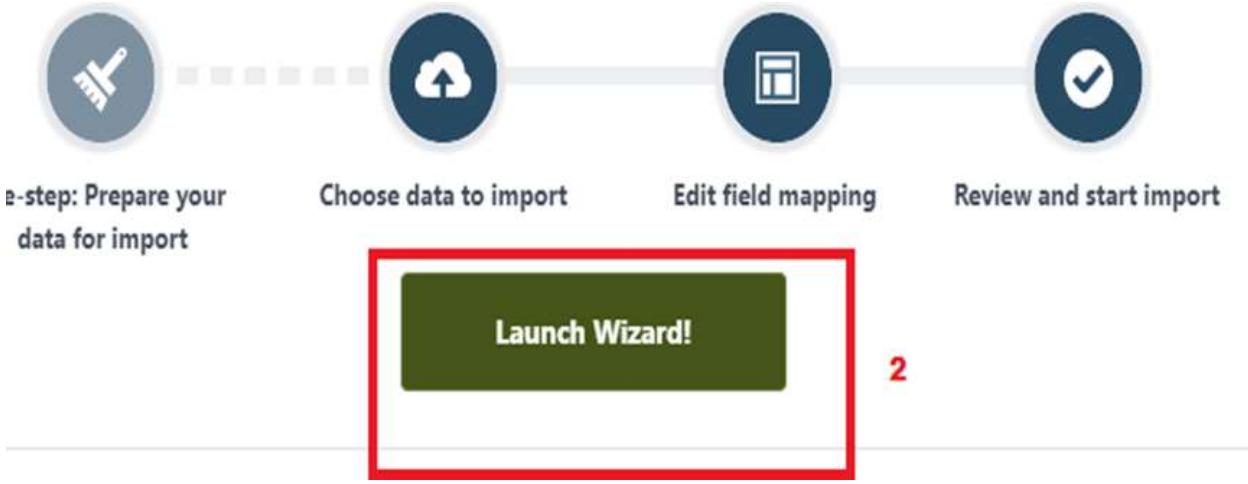
Data Import Wizard—this tool, accessible through the Setup menu, lets you import data in common standard objects, such as contacts, leads, accounts, as well as data in custom objects.

1. From Setup, click the Home tab.
2. Similarly create One Roles under Store Head as Billing Operator.

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The screenshot shows the Salesforce Home page. In the top left, there's a search bar with "data impo" typed in. Below it, a red box highlights the "Data Import Wizard" link under the "Integrations" section. A red number "1" is placed next to this link. At the bottom left, a message says "Didn't find what you're looking for? Try using Global Search." On the right, there's a "Create" button and some decorative icons.

3. Click Launch Wizard!



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

The screenshot shows the "Choose data" step of the Data Import Wizard. At the top, there are three tabs: "Let's do this" (selected), "Choose data" (highlighted in blue), and "Edit mapping". Below these are two buttons: "Start import" and "Next".

The main area lists custom objects as rows:

Drivers	>
Fees	>
others	3 >
Consultants	> <span style="border: 2px solid red; padding: 2px;"> </span>
Our Customers	>
Properties	>

A red box surrounds the "Consultants" row, and a red number "3" is placed next to the "others" row. At the bottom, there are "Cancel", "Previous", and "Next" buttons.

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 file Consultant\_CS1 which we made earlier. Click Next.

Choose data Edit mapping Start import

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: Which User field in your file designates record owners? 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

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

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.

Help for this page

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.

Great job

Choose data Edit mapping Start import

Review & Start Import

Review your import information and click Start Import.

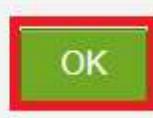
Your selections: Your import will include: Your import will not include:

Consultants ✓	Mapped fields	Unmapped fields
Add new records ✓	7	0
Consultants - Sheet1 (2).csv ✓		

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.



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

Batches									Records Processed	Records Failed	Retry Count	State Message	Status
View Request	View Result	Batch ID	Start Time	End Time	Total Processing Time (ms)	API Active Processing Time (ms)	Apex Processing Time (ms)		Records Processed	Records Failed	Retry Count	State Message	Status
View Request	View Result	7512w00000Xqrar	6/19/2023, 11:05 PM	6/19/2023, 11:05 PM	103	52	0		9	0	0	Completed	

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

**Note** - Do Field mapping carefully.

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

#### **Creating Report :**

Click App Launcher

2.Select Urban Color App

3.Click reports tab

4.Click New Report.

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

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

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

8.Bucket Name as Payment type

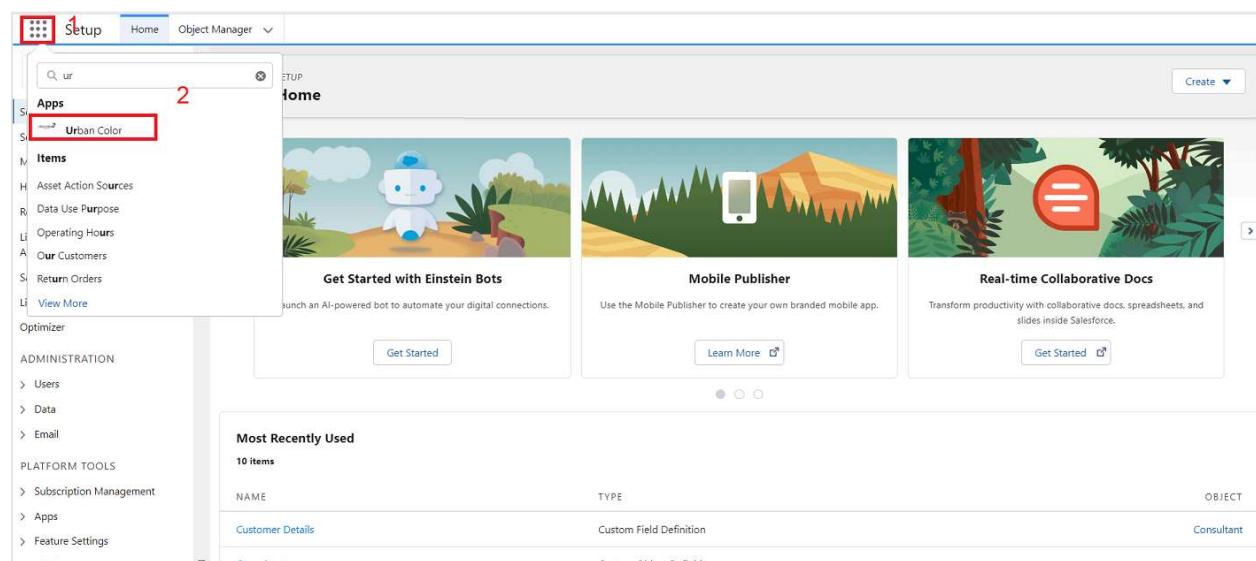
9.Click on Add Bucket and name it as NetBanking

10.Click on Add Bucket and name it as Cash

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

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

13.Click on Apply.



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

Fields > **Outline** Filters

Groups  GROUP ROWS Add group...

Columns  Add column...  Consultant: Consultant Name  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

Update Preview Automatically

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

Fields > **Outline** Filters

Groups  GROUP ROWS Add group...

Columns  Add column...  Consultant: Consultant Name  Delivery Type  Products  Payment  1

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

Sort Ascending   
Sort Descending   
Group Rows by This Field   
Group Columns by This Field  Bucket This Column  2  
Show Unique Count   
Move Left   
Move Right   
Remove Column

Update Preview Automaticall

## Edit Bucket Column

\*Field  \*Bucket Name

All Values (4)		Search Values	
		VALUE	BUCKET
Unbucketed Values (4)		<input type="checkbox"/> Credit Card	
		<input type="checkbox"/> Debit Card	
		<input type="checkbox"/> Upi	
		<input type="checkbox"/> Cash	
<input type="checkbox"/> Bucket remaining values as Other			

## Edit Bucket Column

\*Field  \*Bucket Name

All Values (4)		Search Values	
		VALUE	BUCKET
Bucket Name <span style="border: 2px solid red; padding: 2px;">2</span>		<input type="checkbox"/> Credit Card	
Unbucketed Values (4)		<input type="checkbox"/> Debit Card	
		<input type="checkbox"/> Upi	
		<input type="checkbox"/> Cash	
<input type="checkbox"/> Bucket remaining values as Other			

1

## Edit Bucket Column

\* Field  \* Bucket Name

All Values (4)	Search Values
<input type="checkbox"/> Net Banking (0)	<input type="checkbox"/> VALUE BUCKET
<input type="checkbox"/> Cash (0)	<input type="checkbox"/> Credit Card
	<input type="checkbox"/> Debit Card
	<input type="checkbox"/> Upi
	<input type="checkbox"/> Cash

Unbucketed Values (4)

Bucket remaining values as Other

Add Bucket

Cancel

## Edit Bucket Column

\* Field  \* Bucket Name

All Values (4)	Search Values
<input type="checkbox"/> Net Banking (0)	<input type="checkbox"/> VALUE BUCKET
<input type="checkbox"/> Cash (0)	<input checked="" type="checkbox"/> Credit Card
	<input checked="" type="checkbox"/> Debit Card
	<input checked="" type="checkbox"/> Upi
	<input type="checkbox"/> Cash

Unbucketed Values (4)

Bucket remaining values as Other

Add Bucket

## Edit Bucket Column

\* Field                            \* Bucket Name

Payment	X	Payment type
---------	---	--------------

All Values (4)

Value	Bucket
Net Banking (3)	Net Banking
Cash (0)	Net Banking
Unbucketed Values (1)	Net Banking

Search Values

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

Bucket remaining values as Other

Add Bucket                            Move To ▾

Cancel                            Apply

## Edit Bucket Column

\* Field                            \* Bucket Name

Payment	X	Payment type
---------	---	--------------

All Values (4)

Value	Bucket
Net Banking (3)	Net Banking
<input checked="" type="checkbox"/> Cash (1)	Cash
Unbucketed Values (0)	

Search Values

Value	Bucket
<input checked="" type="checkbox"/> Cash	Cash

Bucket remaining values as Other

Add Bucket                            Move To ▾

Cancel                            Apply

14.In Group Rows Add Payment Type Bucket Field.

15.Click refresh

16.Click Save and Run

17.Give report name – Consultant report

18.Click Save

REPORT ▾

New Consultants Report Consultants

Fields > Outline Filters

Groups

GROUP ROWS

Add group...

Columns

Add column...

Consultant: Consultant Name

Delivery Type

Products

Payment

Payment type

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

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

**REPORT ▾**

New Consultants Report **Consultants**

Fields > **Outline** Filters

**Groups**

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

**Columns**

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

**Payment type ↑**

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

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

Save Report

1 **\* Report Name**

Consultants Report

Report Unique Name

Consultants\_Report\_hvb

Report Description

2 **Folder**

Private Reports

Select Folder

3

Cancel

### View Reports :

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

The screenshot shows the Salesforce Setup Home page for the 'Urban Color' application. The sidebar on the left lists various setup items like Apps, 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 section titled 'Most Recently Used' showing a list of 10 items, including 'Customer Details' (Custom Field Definition) and 'Consultant' (Object). The top navigation bar includes tabs for Home, Object Manager, and Create, along with a search bar. The Reports tab is highlighted in the top navigation bar.

## Task 11 : Working with dashboards :

### Create Dashboard :

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

## New Dashboard

\* Name

3

Consultant Dashboard

Description

Folder

Private Dashboards

Select Folder

4

Cancel

Create

### Select Report

#### Reports

##### Recent

Created by Me

Private Reports

Public Reports

All Reports

#### Folders

Created by Me

Shared with Me

All Folders

#### Select Report

Q. Search Reports and Folders...

Reports and Folders ▾

Consultants Report  
Hazari Ajay Kumar - [REDACTED] Private Reports

6

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

7

## Add Component

The screenshot shows the 'Add Component' dialog with the following steps highlighted:

- 1 Report
- 2 Consultants Report
- 3 Use chart settings from report
- 4 Display As (highlighted with a red box)
- 5 Payment type
- 6 X-Axis
- 7 Record Count (highlighted with a red box)
- 8 Add (highlighted with a red box)
- 9 Save (highlighted with a red box)

**Display As:**

Icon	Name
Bar chart	Bar Chart
Line chart	Line Chart
Donut chart	Donut Chart
Table	Table
Map	Map
Gauge	Gauge
Grid	Grid

**Preview:**

**Consultants Report**

Record Count

Payment type	Record Count
Net Banking	7
Cash	2

**View Report (Consultants Report)**

**Dashboard Preview:**

**Consultant Dashboard**

**Consultants Report**

Record Count

Payment type	Record Count
Net Banking	7
Cash	2

**View Report (Consultants Report)**

### View DashBoard :

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

1 Setup Home Object Manager

2 Apps Urban Color

3 Dashboards

4 Consultant Dashboard

Setup Home Object Manager

Apps Urban Color

Items

H Asset Action Sources

R Data Use Purpose

L Operating Hours

A Our Customers

S Return Orders

View More

Optimizer

ADMINISTRATION

> Users

> Data

> Email

PLATFORM TOOLS

> Subscription Management

> Apps

> Feature Settings

Urban Color Our Customers Consultants Retailers others Reports Dashboards

Search recent dashboards... New Dashboard New Folder

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