

Cosmetics Store Management

Description :

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

Summary :

1. Key Features:Customer Management:

- Contacts & Accounts: Efficiently manage customer details, including contact information, purchase history, and preferences.
 - Customer Segmentation: Segment customers based on various criteria such as purchase frequency, product preference, and location for targeted marketing.
- #### 2. Product Management:
- Product Catalog: Maintain an up-to-date catalog of cosmetic products with detailed descriptions, pricing, and availability.
 - Inventory Tracking: Monitor stock levels, set reorder points, and track inventory turnover to ensure optimal stock levels.

3. Sales Management:

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

4. Marketing & Promotions:

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

5. Customer Service:

- Case Management: Track and resolve customer service issues and complaints efficiently.
 - Knowledge Base: Provide customers with access to a self-service portal for FAQs, product information, and troubleshooting.
- #### 6. Integration & Automation:
- Salesforce Integration: Integrate with other systems such as ERP or e-commerce platforms to ensure seamless data flow.
 - Workflow Automation: Automate repetitive tasks and processes to increase operational efficiency and reduce manual errors

TASKS :

1.Creating the Objects :

To Create an object:

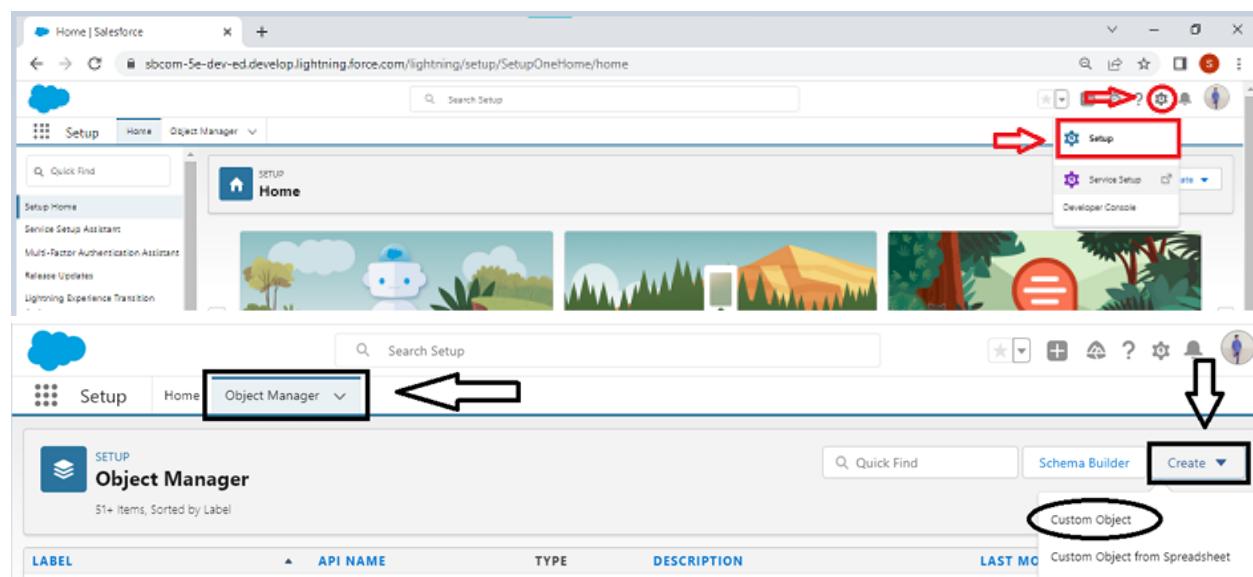
Creation of Objects for Urban Color, For this Urban Color we need to create 3 objects i.e .,Our Customers,Consultants,Retailers,others.

The below steps will assist you in creating those objects.

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

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

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



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

For creating the another 3 objects, we need 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 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 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.

Task 3: Page Layout creation :

- From the Salesforce setup menu, go to "Object Manager" and select the Consultants object.
- Click on "Page Layouts" in the left sidebar. This will display a list of available page

layouts for the selected object.

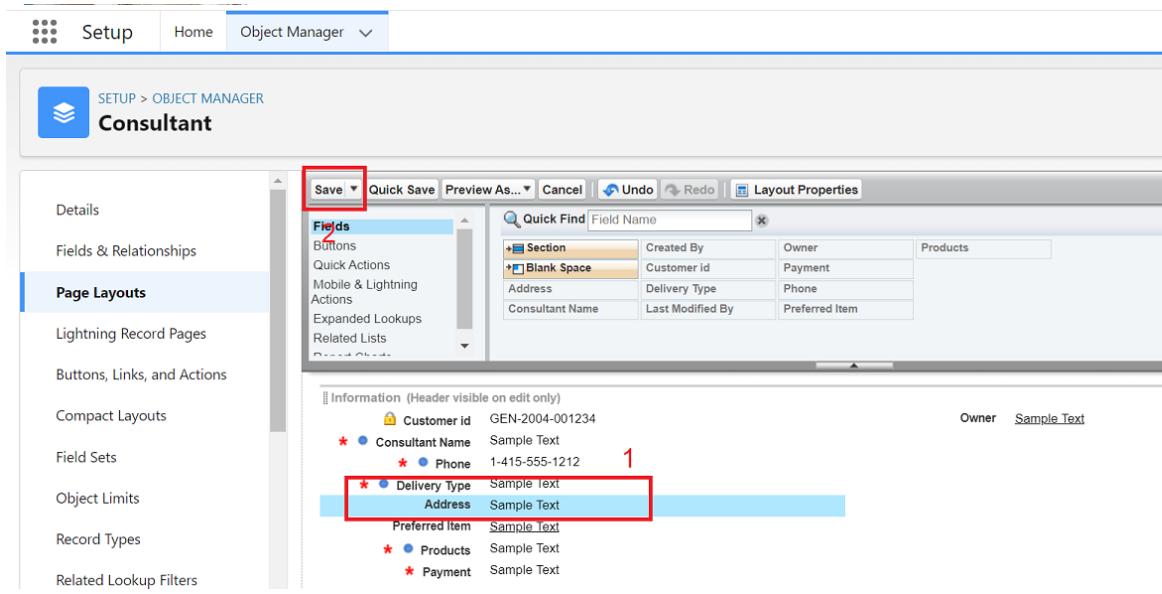
3. Select the Consultant Layout page layout.

The screenshot shows the Salesforce Setup interface for the 'Consultant' object. The left sidebar lists various configuration options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, etc. The 'Page Layouts' tab is currently selected, indicated by a red box labeled '1'. In the main area, a table titled 'Page Layouts' displays one item: 'Consultant Layout'. This entry is also highlighted with a red box labeled '2'. The table has columns for 'PAGE LAYOUT NAME', 'CREATED BY', and 'MODIFIED BY'. The 'CREATED BY' column shows 'Hazari Ajay Kumar, 4/1/2023, 7:25 AM' and the 'MODIFIED BY' column shows 'Hazari Ajay Kumar, 6/18/2023, 10:30 PM'.

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

The screenshot shows the 'Layout Properties' editor for the 'Consultant' page layout. The left sidebar shows the same configuration options as the previous screen. The main area has tabs for 'Save', 'Quick Save', 'Preview As...', 'Cancel', 'Undo', 'Redo', and 'Layout Properties'. Under the 'Fields' tab, a table lists fields: Customer id (Section), Consultant Name (Blank Space), Phone (Section), Preferred Item (Blank Space), Products (Section), Payment (Blank Space), and Delivery Type (Section). Below this, an 'Information' section shows field details: Customer id (GEN-2004-001234), Consultant Name (Sample Text), Phone (1-415-555-1212), Preferred Item (Sample Text), Products (Sample Text), Payment (Sample Text), and Delivery Type (Address). A red arrow points to the 'Delivery Type' field.

5. Click on Save.



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

► Task 4 : Creation of a Lightning App :

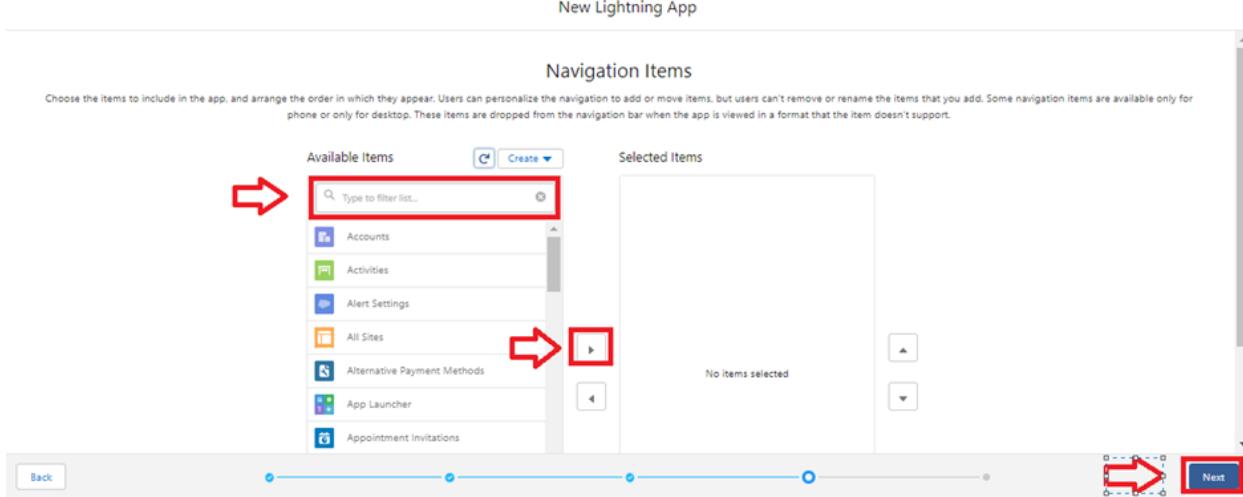
- An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar
 - To create a lightning app page:
- Go to setup page --> search “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 in. Below it, a navigation bar includes 'Setup', 'Home', 'Object Manager', and a search icon. A red arrow points to the 'app manager' search result. Another red arrow points to the 'New Lightning App' button in the top right corner. A third red arrow points to the 'Clone Apps(Beta)' link. The main area displays a table of 35 items, sorted by app name, with columns for App Name, Developer Name, Description, Last Modified, App Type, and Version. The table lists various standard Salesforce apps like 'All Tabs', 'Analytics Studio', 'App Launcher', etc.

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.

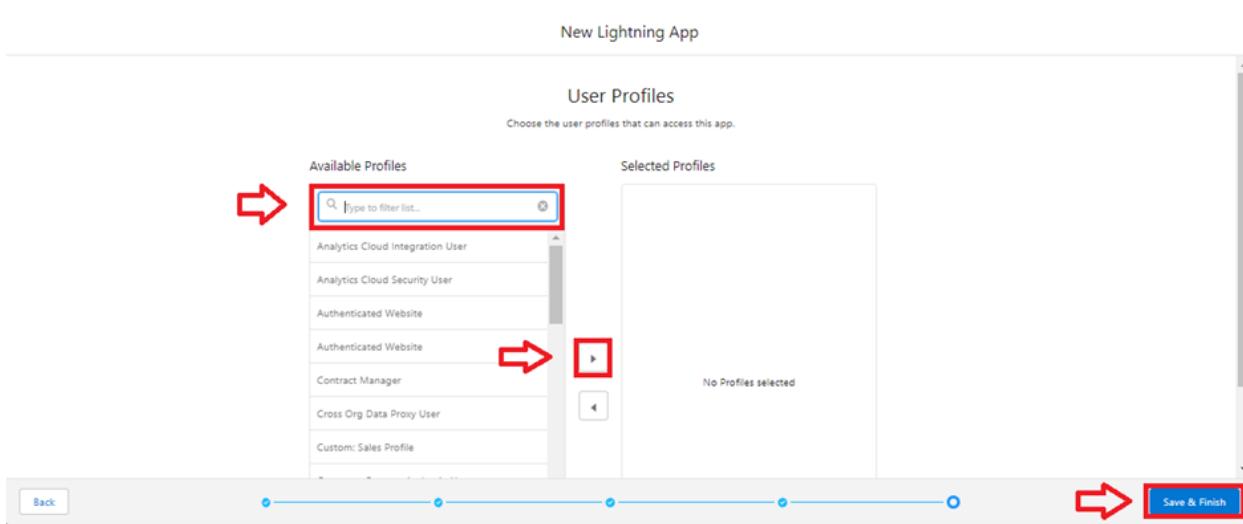
The screenshot shows the 'New Lightning App' configuration page. The title is 'New Lightning App'. The main section is 'App Details & Branding'. It has two tabs: 'App Details' and 'App Branding'. In the 'App Details' tab, there is a field labeled 'App Name' with the placeholder 'Name your app...' and a red arrow pointing to it. Below it is a 'Developer Name' field with the placeholder 'Enter a developer name...'. In the 'App Branding' tab, there is a 'Primary Color Hex Value' field set to '#0070D2' with a red arrow pointing to it. There is also an 'Image' upload field and an 'Org Theme Options' checkbox. At the bottom right of the page, there is a 'Next' button with a red arrow pointing to it.

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.

► 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.

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. A search bar at the top left contains 'prof'. Below it, a sidebar has 'Users' collapsed and 'Profiles' expanded, which is highlighted in yellow. The main content area is titled 'SETUP Profiles' and shows a 'Clone Profile' dialog. The dialog has a heading 'Clone Profile' and a sub-instruction 'Enter the name of the new profile.' It contains a note 'You must select an existing profile to clone from.' with 'Existing Profile' set to 'Standard User' and 'User License' set to 'Salesforce'. The 'Profile Name' field is filled with 'Store Supervisor'. At the bottom are 'Save' and 'Cancel' buttons. A help link 'Help for this Page' is in the top right corner.

2. While still on the profile page, then click Edit.

Q profi

SETUP Profiles

Profile
Store Supervisor

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

Profile Detail

Name	Store Supervisor
User License	Salesforce
Description	

Edit **Clone** **Delete** **View Users**

Custom Profile

Community (standard_Community)	(standard_Chatter)
<input checked="" type="checkbox"/>	<input type="radio"/>
Content (standard_Content)	(standard_LightningScheduler)
<input checked="" type="checkbox"/>	<input type="radio"/>
Data Manager (standard_DataManager)	Sample Console (standard_ServiceConsole)
<input checked="" type="checkbox"/>	<input type="radio"/>
Digital Experiences (standard_SalesforceCMS)	Service (standard_Service)
<input checked="" type="checkbox"/>	<input type="radio"/>
Lightning Usage App (standard_LightningInstrumentation)	Service Console (standard_LightningService)
<input checked="" type="checkbox"/>	<input type="radio"/>
LWC LEARNINGS (LWC_LEARNINGS)	Site.com (standard_Sites)
<input type="checkbox"/>	<input type="radio"/>
Marketing (standard_Marketing)	Subscription Management (standard_RevenueCloudConsole)
<input checked="" type="checkbox"/>	<input type="radio"/>
Queue Management (standard_QueueManagement)	Urban Color (Urban_Color)
<input checked="" type="checkbox"/>	<input type="radio"/>
Rental Management (Rental_Management)	Vehicle Management (Vehicle_Management)
<input type="checkbox"/>	<input type="radio"/>

Service Provider Access

Tab Settings

Override users' personal tab customizations

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

SETUP Profiles

| Async Operation Results | <input type="checkbox"/> |
|--------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Back Synchs | <input type="checkbox"/> |
| Branches | <input type="checkbox"/> |
| Change Bundles | <input type="checkbox"/> |
| Change Bundle Installs | <input type="checkbox"/> |
| Change Submissions | <input type="checkbox"/> |
| Commercial Vehicles | <input type="checkbox"/> |
| Consultants | <input checked="" type="checkbox"/> |
| Customers1 | <input type="checkbox"/> |
| Customer Details | <input type="checkbox"/> |
| Deploy Components | <input type="checkbox"/> |
| Deployment Results | <input type="checkbox"/> |
| Others | <input checked="" type="checkbox"/> |
| Our Customers | <input checked="" type="checkbox"/> |
| Pipelines | <input type="checkbox"/> |
| Pipeline Stages | <input type="checkbox"/> |
| Projects | <input type="checkbox"/> |
| Properties | <input type="checkbox"/> |
| Remote Changes | <input type="checkbox"/> |
| Rentals | <input type="checkbox"/> |
| Repositories | <input type="checkbox"/> |
| Retailers | <input checked="" type="checkbox"/> |
| Semesters | <input type="checkbox"/> |
| Source Member References | <input type="checkbox"/> |

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	<input type="checkbox"/>
Require a minimum 1 day password lifetime	<input type="checkbox"/>
Don't immediately expire links in forgot password emails	<input type="checkbox"/> i

[Save](#) [Save & New](#) [Cancel](#)

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

Setup Home Object Manager

Q profi

Users Profiles

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

Clone Profile

Enter the name of the new profile. Help for this Page ?

You must select an existing profile to clone from. | = Required Information

Existing Profile: Standard Platform User
User License: Salesforce Platform
Profile Name: Billing Operator

Save Cancel

Profile Edit

Billing Operator

Help for this Page ?

Set the permissions and page layouts for this profile.

Profile Edit Save Save & New Cancel

Name:	Billing Operator
User License:	Salesforce
Description:	Custom Profile <input checked="" type="checkbox"/>

Profiles

Allow sharing 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:	<input type="checkbox"/>
Require a minimum 1 day password lifetime:	<input type="checkbox"/>
Don't immediately expire links in forgot password emails:	<input type="checkbox"/> i

Save Save & New Cancel

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.

The image consists of two vertically stacked screenshots of the Salesforce Setup interface, illustrating the process of creating a new role.

Screenshot 1: This screenshot shows the initial setup of a new role. The left sidebar shows navigation paths like 'Users' and 'Sales'. The main area displays a 'Role Edit' form for a 'New Role'. The 'Label' field contains 'Store Head', and the 'Role Name' field contains 'Store_Head'. The 'This role reports to' field has 'thesmartbridge.com' selected. The 'Role Name as displayed on reports' field is empty. At the bottom are 'Save', 'Save & New', and 'Cancel' buttons.

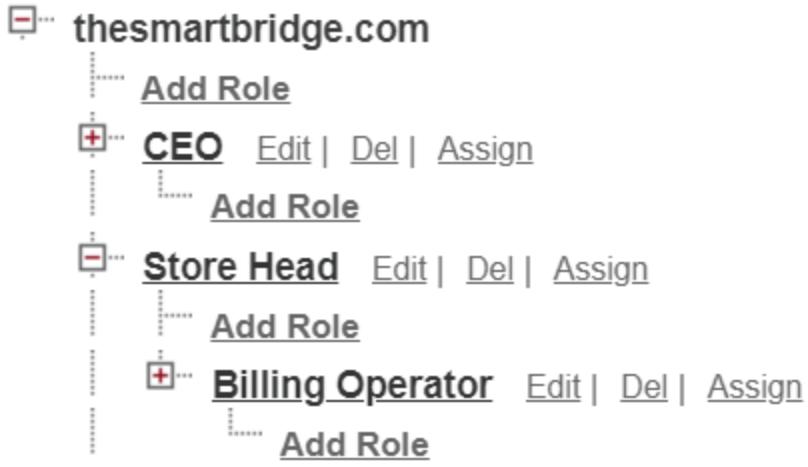
Role Edit	
Label	Store Head
Role Name	Store_Head
This role reports to	thesmartbridge.com
Role Name as displayed on reports	

Screenshot 2: This screenshot shows the continuation of the role creation process. The left sidebar and main area are identical to the first screenshot. The 'Role Edit' form now shows a different configuration: the 'Label' field contains 'Billing Operator', the 'Role Name' field contains 'Billing_Operator', and the 'This role reports to' field has 'Store Head' selected. The 'Role Name as displayed on reports' field is empty. A 'Help for this Page' link is visible in the top right corner of the main area.

Role Edit	
Label	Billing Operator
Role Name	Billing_Operator
This role reports to	Store Head
Role Name as displayed on reports	

Your Organization's Role Hierarchy

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



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

► Task 7 : Creation of an User :

- In Salesforce, a user represents an individual who has access to the Salesforce platform and its functionalities. Each user is assigned a unique username, and their access level and permissions are defined by their profile and role within the organization. Users can perform tasks such as managing records, running reports, and collaborating with team members based on their assigned permissions. Salesforce administrators configure user settings, including login credentials, security settings, and access to various features and data, ensuring that users can efficiently and securely perform their job functions.

1. From Setup, in the Quick Find box, enter Users, and then select Users.
2. Click New User.
3. Enter the user's name Amar K and (Your) email address and a unique username in the form of an email address. By default, the username is the same as the email address.
4. Select a Role(Store Head)
5. Select a User Licence As Salesforce.
6. Select a profile as Store Supervisor.
7. Check Generate new password and notify the user immediately to have the user's login

name and a temporary password emailed to your email.

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

The image displays two screenshots of the Salesforce Setup interface, both centered on the 'Users' section.

User Edit Page (Top Screenshot):

- General Information:** Fields include First Name (Amar), Last Name (k), Alias (ak), Email (mailid@gmail.com), Username (amar2133@salesforce.com), Nickname (User167161323313747430), Title (Store Supervisor), Company, Department, and Division.
- Role:** Store Head
- User License:** Salesforce
- Profile:** Store Supervisor
- Active:** Checked
- Marketing User:** Unchecked
- Offline User:** Unchecked
- Knowledge User:** Unchecked
- Flow User:** Unchecked
- Service Cloud User:** Unchecked
- Site.com Contributor User:** Unchecked
- Site.com Publisher User:** Unchecked
- WDC User:** Unchecked
- Data.com User Type:** -None-

Single Sign On Information Page (Bottom Screenshot):

- Single Sign On Information:** Federation ID field.
- Locale Settings:** Time Zone (GMT-07:00 Pacific Daylight Time (America/Los_Angeles)), Locale (English (United States)), and Language (English).
- Approver Settings:** Delegated Approver, Manager, and Receive Approval Request Emails (Only if I am an approver). A checkbox for Generate new password and notify user immediately is also present.

Task 8 : Creating/Modifying Records :

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

Steps to Create a Record:

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

Steps to Modify a Record:

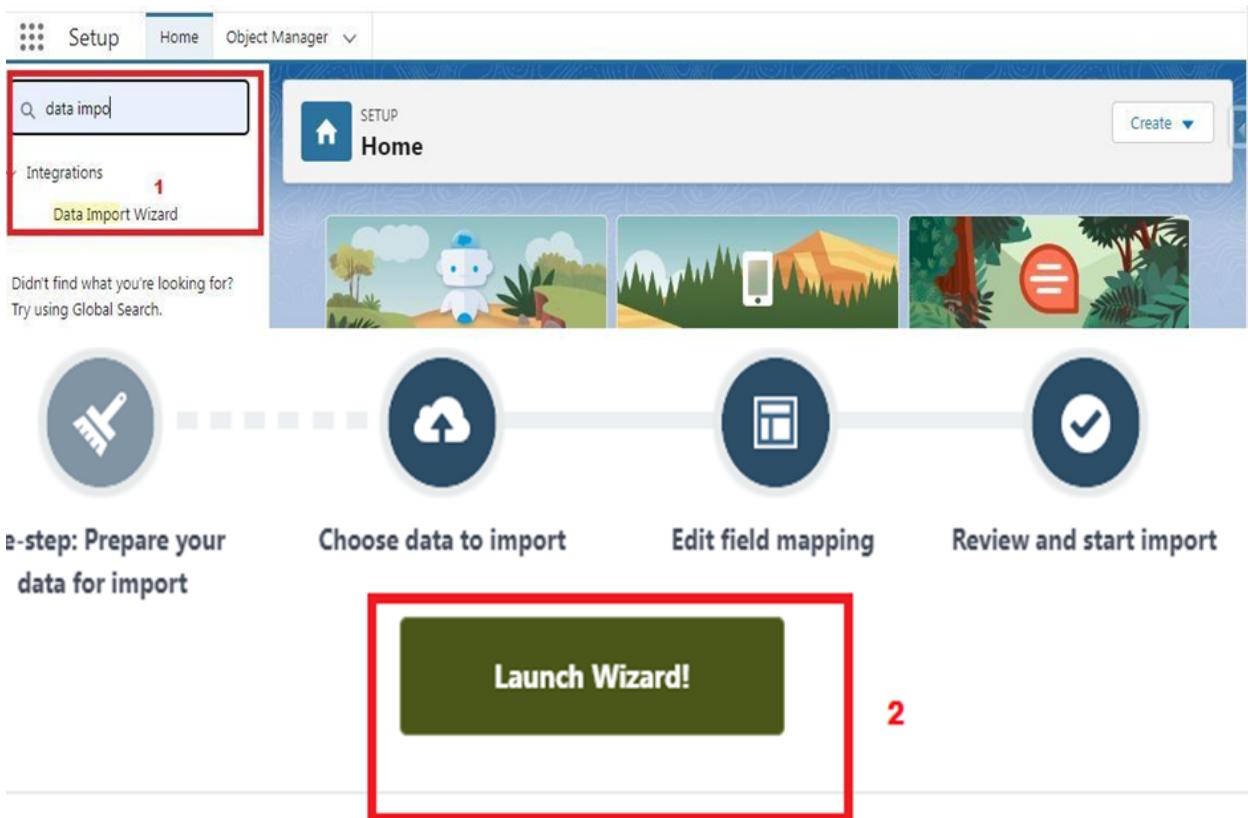
1. Find the Record:
 - Locate the record you want to modify by using the object's list view, search function, or related lists.
2. Open the Record:
 - Click on the record's name to open it and view its details.
3. Click "Edit":
 - In the record's detail view, click the "Edit" button to enable editing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

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

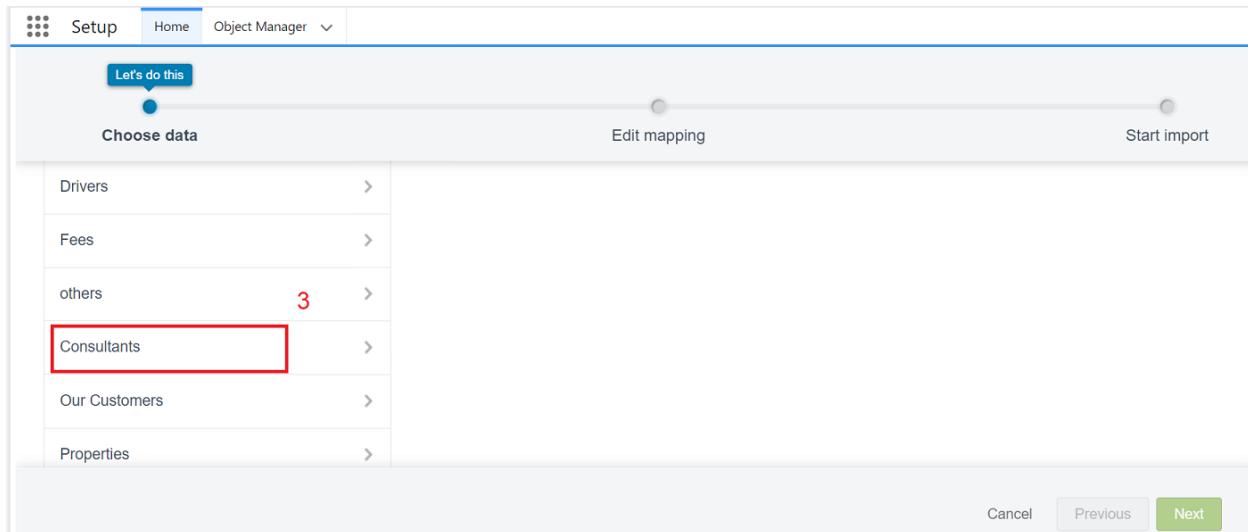
► Task 9: Importing Data :

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

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



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



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

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

Cancel Previous

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

The screenshot shows the 'Edit Field Mapping' step of the Data Import Wizard. At the top, there's a progress bar with three segments: 'Choose data' (blue), 'Edit mapping' (green, highlighted with a blue box), and 'Start import' (grey). A tooltip 'Almost done' is shown above the green segment. Below the progress bar, the title 'Edit Field Mapping: Consultants' is displayed, along with a note: '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.' To the right is a 'Help for this page' link.

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

At the bottom right, there are 'Cancel', 'Previous', and 'Next' buttons. The 'Next' button is highlighted with a red box.

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

The screenshot shows the 'Review & Start Import' step. The progress bar at the top is identical to the previous screen. The main area contains a summary table:

Your selections:	Your import will include:	Your import will not include:
Consultants ✓ Add new records ✓ Consultants - Sheet1 (2).csv ✓	Mapped fields 7	Unmapped fields 0

To the right, there's a 'Great job' message and a 'Help for this page' link. At the bottom right, there are 'Cancel', 'Previous', and 'Start Import' buttons. The 'Start Import' button is highlighted with a red box.

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)						
View Request	View Result	7512w00000Xqrar	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 - Do Field mapping carefully.

► Task 10 :Accessing Reports :

Creating 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 - 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.

The image consists of two vertically stacked screenshots of the Salesforce interface.

Top Screenshot: Shows the App Launcher with 'Urban Color' selected (marked with a red box and number 2). The main content area displays three app cards: 'Get Started with Einstein Bots', 'Mobile Publisher', and 'Real-time Collaborative Docs'. The navigation bar at the top includes 'Setup', 'Home', 'Object Manager', and a search bar.

Bottom Screenshot: Shows the 'Reports' tab selected in the navigation bar (marked with a red box and number 1). The main content area displays a list of recent reports with columns for 'Report Name', 'Description', 'Folder', 'Created By', 'Created On', and 'Subscribed'. A 'New Report' button is located in the top right corner of the list area (marked with a red box and number 2).

REPORT ▾ New Consultants Report **Consultants**

Fields > **Outline** Filters

Groups GROUP ROWS Add group...

Columns Add column...

	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	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

1
2

Bucket This Column

Edit Bucket Column

* Field

* Bucket Name

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

Bucket remaining values as Other

Edit Bucket Column

* Field * Bucket Name

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

1 Bucket remaining values as Other

Add Bucket

Edit Bucket Column

* Field * Bucket Name

All Values (4)
<input type="checkbox"/> Net Banking (0) <input type="button" value="Edit"/> <input type="button" value="Delete"/>
<input type="checkbox"/> Cash (0) <input type="button" value="Edit"/> <input type="button" value="Delete"/>
Unbucketed Values (4)

Bucket remaining values as Other

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

Edit Bucket Column

* Field * Bucket Name

All Values (4)
<input type="checkbox"/> Net Banking (0) <input type="button" value="Edit"/> <input type="button" value="Delete"/>
<input type="checkbox"/> Cash (0) <input type="button" value="Edit"/> <input type="button" value="Delete"/>
Unbucketed Values (4)

Bucket remaining values as Other

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

Edit Bucket Column

* Field * Bucket Name

All Values (4)	Search Values
<input type="checkbox"/> Net Banking (0) <input type="button" value="Edit"/> <input type="button" value="Delete"/>	<input type="checkbox"/> Credit Card
<input type="checkbox"/> Cash (0) <input type="button" value="Edit"/> <input type="button" value="Delete"/>	<input type="checkbox"/> Debit Card
Unbucketed Values (4)	<input type="checkbox"/> Net Banking

Bucket remaining values as Other

Add Bucket

Edit Bucket Column

* Field * Bucket Name

All Values (4)	Search Values
<input type="checkbox"/> Net Banking (3) <input type="button" value="Edit"/> <input type="button" value="Delete"/>	<input type="checkbox"/> Credit Card <input type="checkbox"/> Net Banking
<input type="checkbox"/> Cash (0) <input type="button" value="Edit"/> <input type="button" value="Delete"/>	<input type="checkbox"/> Debit Card <input type="checkbox"/> Net Banking
Unbucketed Values (1)	<input type="checkbox"/> Upi <input type="checkbox"/> Net Banking

Bucket remaining values as Other

Add Bucket

Edit Bucket Column

* Field	* Bucket Name
Payment	Payment type
All Values (4)	Search Values
Net Banking (3) Cash (1)	VALUE BUCKET
Cash	Cash
Unbucketed Values (0)	
<input type="checkbox"/> 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** Previewing a limited number of records. Run the report to see everything.

Groups

Columns

- Add column...
- Consultant: Consultant Name **x**
- Delivery Type **x**
- Products **x**
- Payment **x**
- Payment type** **x**

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

Groups

Columns

- Add column...
- Consultant: Consultant Name **x**
- Delivery Type **x**
- Products **x**
- Payment **x**
- Payment type** **x**

Payment type ↑ ↓ Consultant: Consultant Name **x** Delivery Type **x** Products **x** Payment **x**

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

Subtotal

Cash (2)	Dev Raj	Self Pickup	Lipstick	Cash
	Shankar	Self Pickup	Face Pack	Cash

Subtotal

Total (9)

Save Report

1

* Report Name	Consultants Report
---------------	--------------------

Report Unique Name (i)

Consultants_Report_hvb

Report Description

2

Folder	Private Reports
--------	-----------------

Select Folder

3

Cancel

Save

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 App Launcher interface. On the left, there's a sidebar with various categories like Setup, Home, Object Manager, and a search bar. A red box labeled '1' highlights the 'Setup' icon. Another red box labeled '2' highlights the 'Urban Color' app icon under the 'Apps' section. The main content area shows three promotional cards: 'Get Started with Einstein Bots', 'Mobile Publisher', and 'Real-time Collaborative Docs'. Below these cards is a section titled 'Most Recently Used' with a table showing 10 items. The table has columns for NAME, TYPE, and OBJECT. One visible row shows 'Customer Details' as a Custom Field Definition of type 'Consultant'.

NAME	TYPE	OBJECT
Customer Details	Custom Field Definition	Consultant

Urban Color

Our Customers

Consultants

Retailers

others

Reports

Dashboards

Reports

Recent

4 items

REPORTS

Report Name	Description	Folder	Created By	Created On	Subscribed
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	
Sample Flow Report: Screen Flows	Automated Process	Public Reports			
Opportunities Details		Private Reports	Hazari Ajay Kumar	4/12/2023, 11:46 PM	
Rental New 1		Public Reports	Hazari Ajay Kumar	2/2/2023, 10:39 PM	

FOLDERS

- All Folders
- Created by Me
- Shared with Me

FAVORITES

- All Favorites

► 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.

Urban Color

Our Customers

Consultants

Retailers

others

Reports

Dashboards

Dashboards

Recent

2 items

DASHBOARDS

Dashboard Name	Description	Folder	Created By	Created On	Subscribed
----------------	-------------	--------	------------	------------	------------

Search recent dashboards...

New Dashboard

New Folder

New Dashboard

* Name

3

Consultant Dashboard

Description

Folder

Private Dashboards

Select Folder

4

Cancel

Create

A screenshot of a software interface for creating a new dashboard. At the top, there's a red box around the 'Name' field containing the text 'Consultant Dashboard'. Below it is a 'Description' field with an empty text area. Under 'Folder', there's a dropdown menu set to 'Private Dashboards' with a 'Select Folder' button next to it, which has a red box around it and the number '4' above it. At the bottom right are 'Cancel' and 'Create' buttons.

5

+ Component

Select Report

A screenshot of a report selection interface. On the left, there are filters for 'Reports' (Recent, Created by Me, Private Reports, Public Reports, All Reports) and 'Folders' (Created by Me, Shared with Me, All Folders). The main area shows a list of reports. A red box highlights the 'Consultants Report' entry, which includes the author 'Hazari Ajay Kumar' and the category 'Private Reports'. At the bottom right of the list are 'Cancel' and 'Select' buttons, with a red box around the 'Select' button and the number '6' above it.

Add Component

Report
Consultants Report X

Use chart settings from report i

Display As 7

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 8

Urban Color Our Customers Consultants Retailers others Reports Dashboards Consultant Dashboard Save 9 Done

+ Component + Filter X Y Z

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

The screenshot shows the Salesforce Home page. The left sidebar has a red box around the 'Setup' icon. The main content area has a red box around the 'Urban Color' app in the 'Recent' section. Below the sidebar, there's a 'Most Recently Used' section with a red box around the 'Dashboards' dropdown menu. The bottom part of the screenshot shows a list of recent dashboards with a red box around the 'Recent' tab and another red box around the 'Consultant Dashboard' entry.

NAME	TYPE	OBJECT
Customer Details	Custom Field Definition	Consultant

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	
Oppurunity details		Private Dashboards	Hazari Ajay Kumar	4/12/2023, 11:48 PM	