

URBAN COLOR MANAGEMENT SYSTEM

Empowering Colorful Cities

Developed by:

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Abstract

Urban Color Management System is a specialized Customer Relationship Management (CRM) application designed to manage and coordinate color schemes within urban environments. With the growing emphasis on aesthetic appeal in city planning, managing the diversity of colors across various urban structures—such as buildings, public spaces, and street furniture—has become a complex task. This system provides a comprehensive solution for city planners, architects, and urban developers to maintain and update color schemes effectively. The system offers features like color palette management, project tracking, and stakeholder communication, all within an intuitive interface. By integrating with existing urban planning tools, the Urban Color Management System enhances collaboration between different teams and ensures consistent color application across projects. Key benefits include improved efficiency in project management, better communication among stakeholders, and the ability to maintain a cohesive visual identity across urban spaces. This system aims to contribute to the creation of visually appealing cities that reflect a harmonious blend of tradition and modernity.

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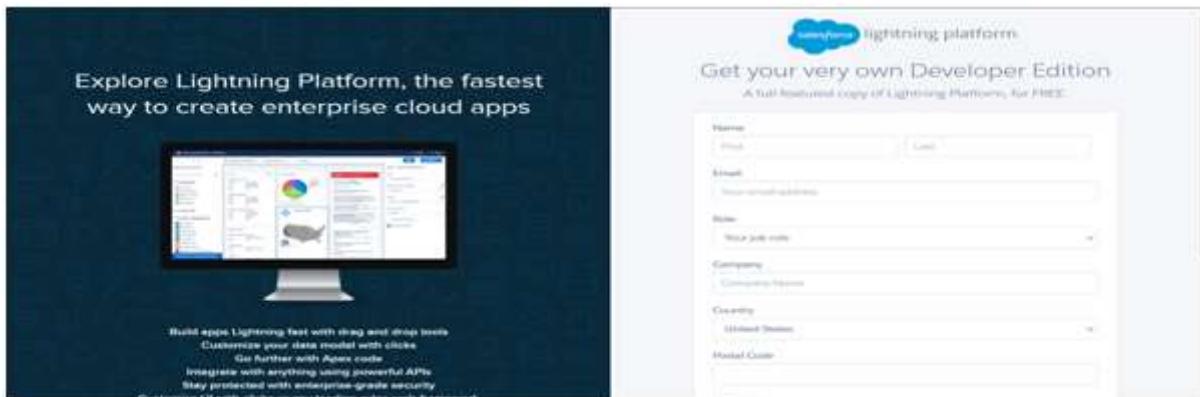
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1. Creating a Developer Account in Salesforce Step

Step 1: Sign Up for a Developer Org

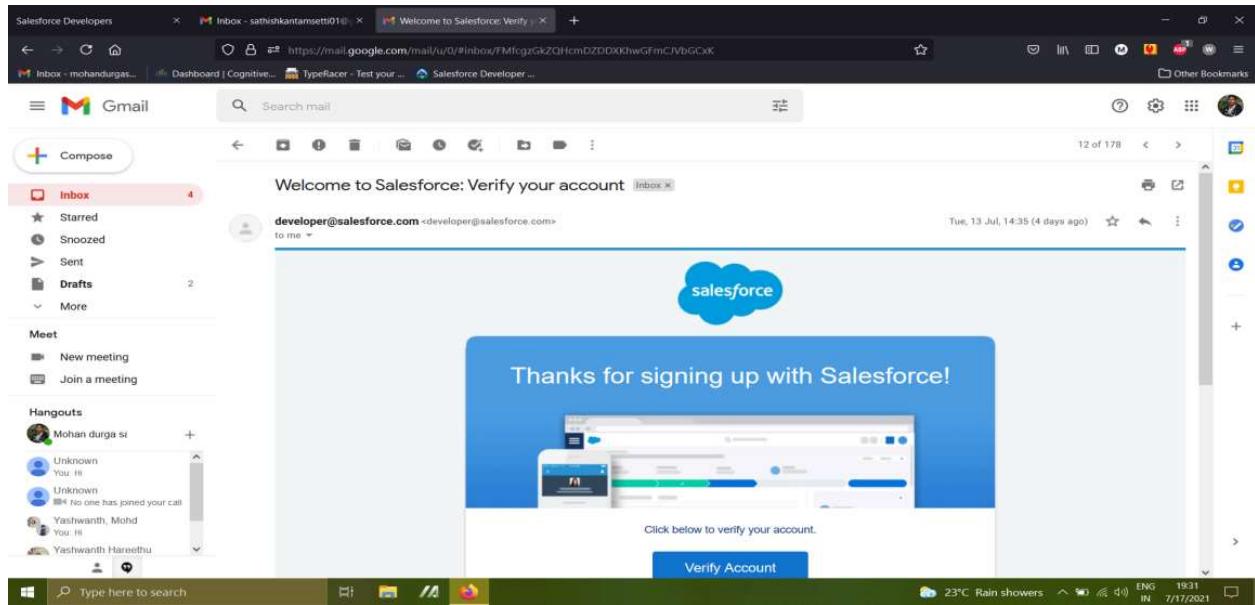
1. Go to [todevelopers.salesforce.com/signup](https://www.developers.salesforce.com/signup).
2. Click on "Sign Up."
3. Fill out the Sign-Up Form with the following details:
 - First Name & Last Name
 - Email
 - Role: Developer
 - Company: [Your College Name]
 - Country: India
 - Postal Code: [Your Pin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

4. Click on "Sign Up" after filling in all the details.



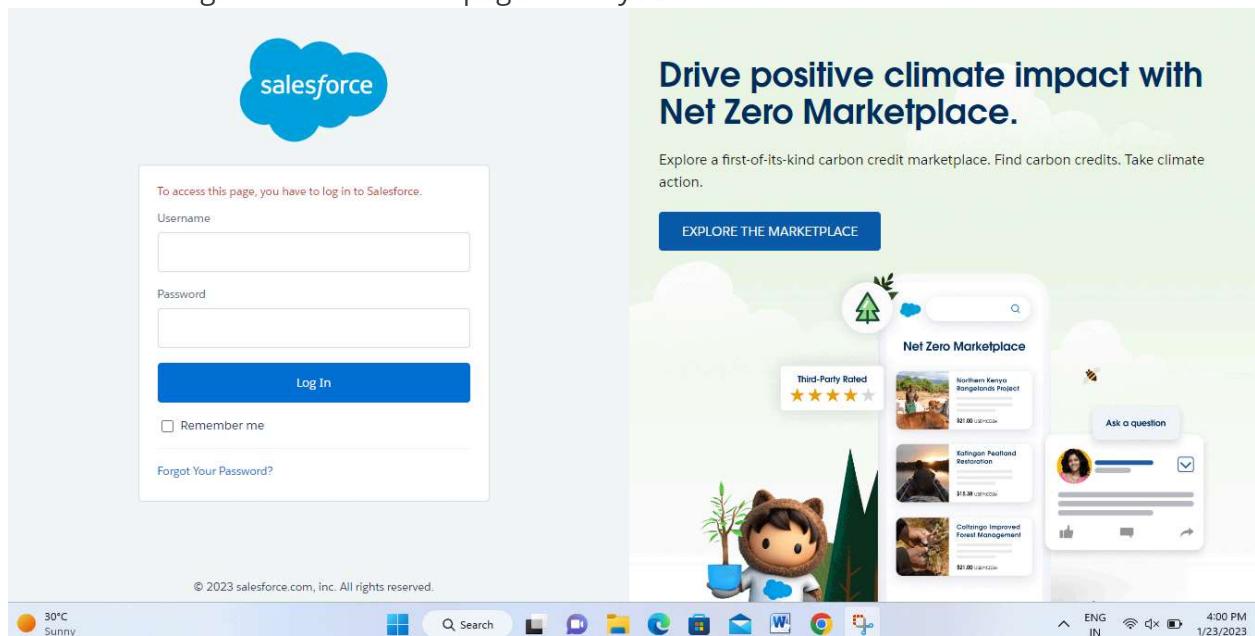
Step 2: Account Activation

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



Login To Your Salesforce Account

1. Go to salesforce.com and click on login.
2. Enter the username and password that you just created.
3. After login this is the home page which you will see.



Step 5: Salesforce Login

<https://login.salesforce.com>

To access this page, you have to log in to Salesforce.

Username

Password

Remember me

[Forgot Your Password?](#)

Log In

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Drive positive climate impact with Net Zero Marketplace.

Explore a first-of-its-kind carbon credit marketplace. Find carbon credits. Take climate action.

EXPLORE THE MARKETPLACE

The screenshot shows a user interface for the Net Zero Marketplace. At the top, there's a search bar with a magnifying glass icon and a 'Net Zero Marketplace' button. Below the search bar, there's a section titled 'Third-Party Rated' with a 5-star rating icon. Three project cards are displayed: 'Northern Kenya Rangelands Project' (121.00 credits), 'Katanga Peatland Restoration' (114.00 credits), and 'Collingto Improved Forest Management' (121.00 credits). To the right, there's a sidebar with a user profile picture, a message box labeled 'Ask a question', and a small bee icon. A cartoon character holding a tree is positioned in front of the main content area.



2.Salesforce Objects

Salesforce objects are database tables that allow you to store data specific to an organization. Objects in Salesforce are of two types:

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

2.1.Creating Objects for Urban Color Management

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

Step 1: Access Setup

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

Step 2: Open Object Manager

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

Step 3: Create a Custom Object

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

Step 4: Create "Our Customer" Object

1. On the Custom Object Definition page, enter the following details:

- Label:Our Customer
- Plural Label: Our Customers
- Record Name: Our Customer

2. Check the following boxes:

- Allow Reports
 - Allow Search
3. Click "Save" to create the object.

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

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

2.2.Creating the Consultants Object

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

Step 1: Access Setup

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

Step 2: Open Object Manager

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

Step 3: Create a Custom Object

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

Step 4: Create "Consultants" Object

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

Step 5: Create a Custom Tab for "Consultants"

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

7. Click "Next" again, then Save.

2.3.Creating the Retailers Object

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

Step 1: Access Setup

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

Step 2: Open Object Manager

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

Step 3: Create a Custom Object

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

Step 4: Create "Others" Object

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

Step 5: Create a Custom Tab for "Others"

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

3. Fields and Relationships

In Salesforce, an object relationship is a two-way association between two objects, allowing users to connect and interact with related data across different objects. This relationship is established by creating custom relationship fields on an object. These relationship fields enable users to view records and seamlessly access related information, providing a comprehensive view of data across the Salesforce environment. By using relationships, Salesforce ensures that all related data is interconnected, making it easier for users to navigate between related records, improving data consistency, and enhancing the overall user experience.

3.1.Fields in the "Our Customers" Object

The following fields are defined in the "Our Customers" object, each with specific

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

3.2.Fields in Consultants objects

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

S No	Field Label	Data Type
1	Customer id	Auto Number
2	Customer Name	Text
3	Mobile Number	Phone
4	Email id	Email
5	Delivery Type 1)Self Pickup 2)Courier	Picklist
6	Products 1)Lipstick	

	2)Compact 3)EyeLiner 4)FacePack 5)Lip Balm 6)Nail Polish	Multi-Picklist
7	Payment 1)Debit Card 2)Credit Card 3)UPI 4)Cash	Picklist
8	Customer details	Lookup(Our Customers Object)
9	Address	Text Long

3.3.Fields in Retailers objects

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

S No	Field Label	Data Type
1	Customer id	Auto Number
2	Customer Name	Text
3	Mobile Number	Phone
4	Email id	Email
5	Delivery Type 1)Self Pickup 2)Courier	Picklist
6	Products 1)Lipstick 2)Compact 3)EyeLiner 4)FacePack 5)Lip Balm	Multi-Picklist

	6)Nail Polish	
7	Payment 1)Debit Card 2)Credit Card 3)UPI 4)Cash	Picklist
8	Customer Details	Master-Detail Relationship (Our Customers Object)

3.4.Fields in Others objects:

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

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

4. Page Layouts

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

Page Layout Creation

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

The screenshot shows the Salesforce Object Manager for the 'Consultant' object. The left sidebar has a red box around 'Page Layouts' with the number '1' next to it. The main area displays a table titled 'Page Layouts' with one item: 'Consultant Layout'. The table has columns for 'PAGE LAYOUT NAME', 'CREATED BY', and 'MODIFIED BY'. The 'Consultant Layout' row shows 'Hazari Ajay Kumar, 4/1/2023, 7:25 AM' in the created by column and 'Hazari Ajay Kumar, 6/18/2023, 10:30 PM' in the modified by column. A red box labeled '2' is placed over the 'Consultant Layout' row.

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

The screenshot shows the Salesforce Page Layout editor for the 'Consultant' object. The left sidebar has a red box around 'Page Layouts' with the number '1' next to it. The main area shows the 'Fields' section of the layout editor. A red arrow points from the 'Delivery Type' field in the list below to its position in the layout editor. The layout editor shows fields like 'Customer Id', 'Consultant Name', 'Phone', 'Preferred Item', 'Products', 'Payment', 'Address', and 'Last Modified By'. Below the layout editor, there is a table with columns for 'Information' and 'Header visible on edit only'.

5. Click on Save



SETUP > OBJECT MANAGER

Consultant

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Save

Save

Quick Save

Preview As...

Cancel

Undo

Redo

Layout Properties

Fields

- Buttons
- Quick Actions
- Mobile & Lightning Actions
- Expanded Lookups
- Related Lists
- Dynamic Charts

Quick Find Field Name

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

Information (Header visible on edit only)

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

Owner Sample Text

1

Delivery Type Sample Text**Address** Sample Text**Preferred Item** Sample Text**Products** Sample Text**Payment** Sample Text

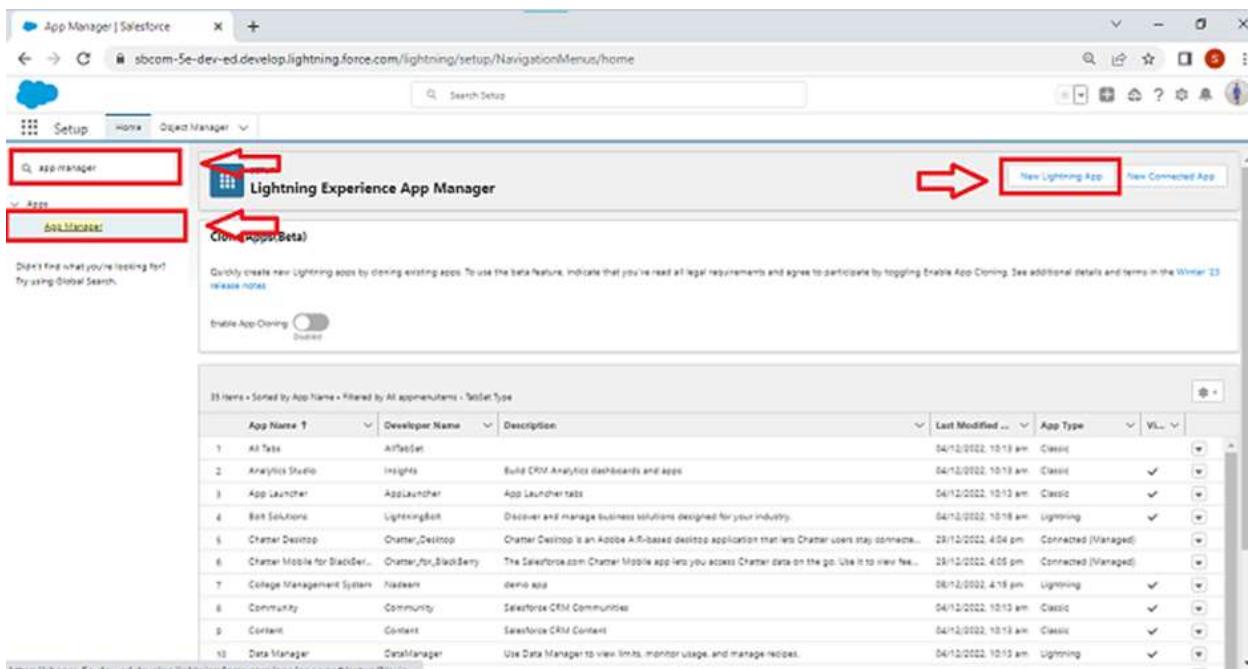
5.The Lightning App

An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar. Lightning apps let you brand your apps with a custom Color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your org can work more efficiently by easily switching between apps.

5.1.Create a Lightning App

To create a Lightning app page:

1. Go to the Setup page.
2. In the Quick Find search bar, type “App Manager” and select “App Manager”.
3. Click on New Lightning App.
 - Fill the app name as Urban Color in App Details and Branding.
 - Click Next.
 - On the App Options page, keep the settings as default.
 - Click Next.
 - On the Utility Items page, keep the settings as default.
 - Click Next



To Add Navigation Items:

1. Select the items (Our Customers, Consultants, Retailers, Others, ReportsDashboards) from the search bar and move them using the arrow button.

2. Click Next.

New Lightning App

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

* App Name (Red arrow)

* Developer Name

Description

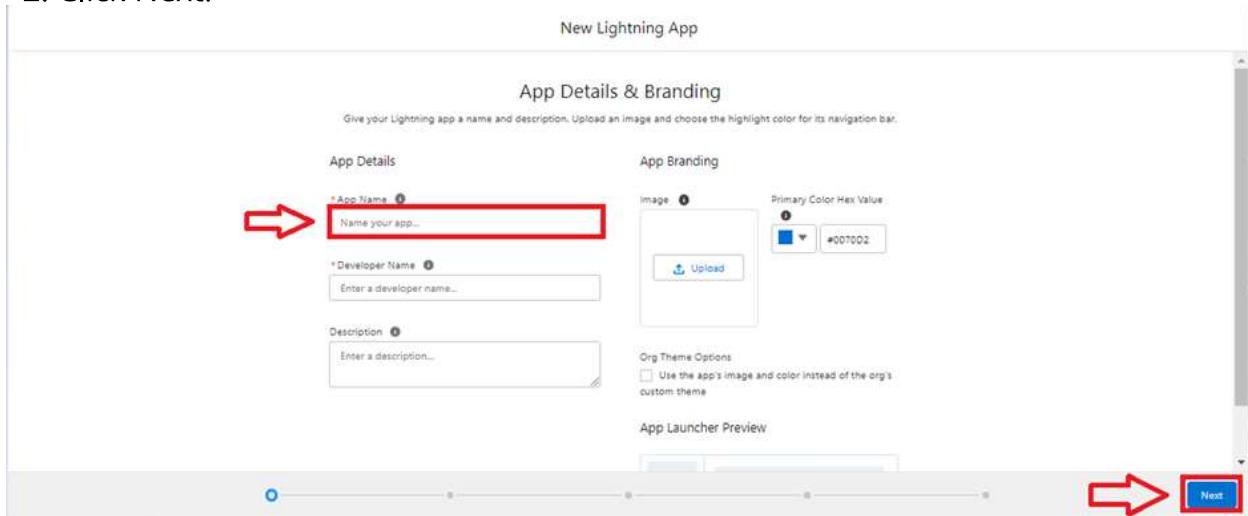
App Branding

Image Primary Color Hex Value

Org Theme Options Use the app's image and color instead of the org's custom theme

App Launcher Preview

Progress Bar: Step 1 of 6 Next (Red arrow)



To Add User Profiles:

1. Search for profiles (System Administrator) in the search bar.
2. Click on the arrow button to add the profile.
3. Click Save & Finish.

New Lightning App

User Profiles

Choose the user profiles that can access this app.

Available Profiles

(Red arrow)

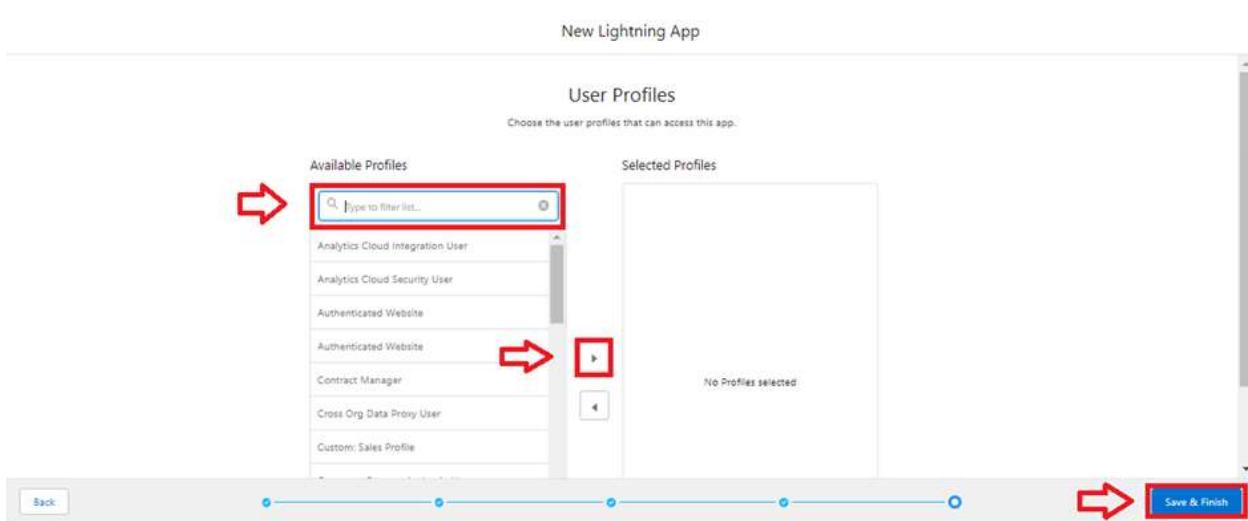
Analytics Cloud Integration User
Analytics Cloud Security User
Authenticated Website
Authenticated Website (Red arrow)

Contract Manager
Cross Org Data Proxy User
Custom: Sales Profile

Selected Profiles

No Profiles selected

Progress Bar: Step 2 of 6 Save & Finish (Red arrow)



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 pageaccess, Page layouts, Record Types, Login hours & Login IP ranges.

6.1.Creating a Profile

Creating a Store Supervisor Profile and Setting Object Permissions:

1. From Setup, enter Profiles in the Quick Find box, and select Profiles.
2. From the list of profiles, find Standard User.
3. Click Clone.
4. For Profile Name, enter Store Supervisor.
5. Click Save.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar on the left contains the text 'prof'. The main area is titled 'Profiles' under the 'SETUP' tab. On the left sidebar, 'Profiles' is selected. A message says 'Didn't find what you're looking for? Try using Global Search.' Below it, there's a 'Clone Profile' section with a note 'Enter the name of the new profile.' A warning message 'You must select an existing profile to clone from.' is displayed above a form field. The form fields include 'Existing Profile' (set to 'Standard User'), 'User License' (set to 'Salesforce'), and 'Profile Name' (set to 'Store Supervisor'). At the bottom of the dialog are 'Save' and 'Cancel' buttons. A help link 'Help for this Page' is visible in the top right corner.

6. While still on the Store Supervisor profile page, click Edit.
7. Scroll down to Custom Object Permissions and give access for Create, Read, Edit, Delete, View All, and Modify All for the Our Customers, Consultants, Retailers, Others objects

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

Profile Detail

Edit		Clone	Delete	View Users
Name	Store Supervisor			
User License	Salesforce			Custom Profile <input checked="" type="checkbox"/>
Description				

Service Provider Access

Tab Settings

(Openenle users' personal tab customizations)

Profiles

Profile	Description	Actions
Community (standard_Community)		<input checked="" type="checkbox"/>
Content (standard_Content)		<input checked="" type="checkbox"/>
Data Manager (standard_DataManager)		<input checked="" type="checkbox"/>
Digital Experiences (standard_SalesforceCMS)		<input checked="" type="checkbox"/>
Lightning Usage App (standard_LightningInstrumentation)		<input checked="" type="checkbox"/>
LVC LEARNINGS (LVC_LEARNINGS)		<input type="checkbox"/>
Marketing (standard_Marketing)		<input checked="" type="checkbox"/>
Quota Management (standard_ConnectorManagement)		<input checked="" type="checkbox"/>
Rental Management (Rental_Management)		<input type="checkbox"/>
(standard_Lightning)		<input type="checkbox"/>
Customer (standard_Customer)		<input checked="" type="checkbox"/>
Salesforce Scheduler Setup (standard_LightningScheduler)		<input type="checkbox"/>
Sample Console (standard_ServiceConsole)		<input type="checkbox"/>
Service (standard_Service)		<input checked="" type="checkbox"/>
Service Console (standard_RevenueCloudConsole)		<input checked="" type="checkbox"/>
Site.com (standard_Bsite)		<input checked="" type="checkbox"/>
Subscription Management (standard_VehicleManagement)		<input checked="" type="checkbox"/>
Urban Color (Urban_Color)		<input type="checkbox"/>
Vehicle Management (Vehicle_Management)		<input type="checkbox"/>
WDC (standard_Work)		<input checked="" type="checkbox"/>

Service Provider Access

Tab Settings

(Openenle users' personal tab customizations)

Profiles

Profile	Description	Actions
Community (standard_Community)		<input checked="" type="checkbox"/>
Content (standard_Content)		<input checked="" type="checkbox"/>
Data Manager (standard_Datamanager)		<input checked="" type="checkbox"/>
Digital Experiences (standard_SalesforceCMS)		<input checked="" type="checkbox"/>
Lightning Usage App (standard_LightningInstrumentation)		<input checked="" type="checkbox"/>
LVC LEARNINGS (LVC_LEARNINGS)		<input type="checkbox"/>
Marketing (standard_Marketing)		<input checked="" type="checkbox"/>
Quota Management (standard_ConnectorManagement)		<input checked="" type="checkbox"/>
Rental Management (Rental_Management)		<input type="checkbox"/>

Service Provider Access

Tab Settings

(Openenle users' personal tab customizations)

8. Scroll down to Custom App Settings and give access to Urban Color.
9. Click on Save.

To Create a New Profile:

1. Go to Setup.
2. Type Profiles in the Quick Find box.
3. Click on Profiles.
4. Clone the desired profile (Standard User is preferable).
5. Enter the Profile Name.
6. Click Save.
7. While still on the profile page, click Edit

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"/>					
						Source Member References
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"/>					

SETUP Profiles

Allow audit for employees 

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"/> 

Save **Save & New** **Cancel**

3. Click on Save.

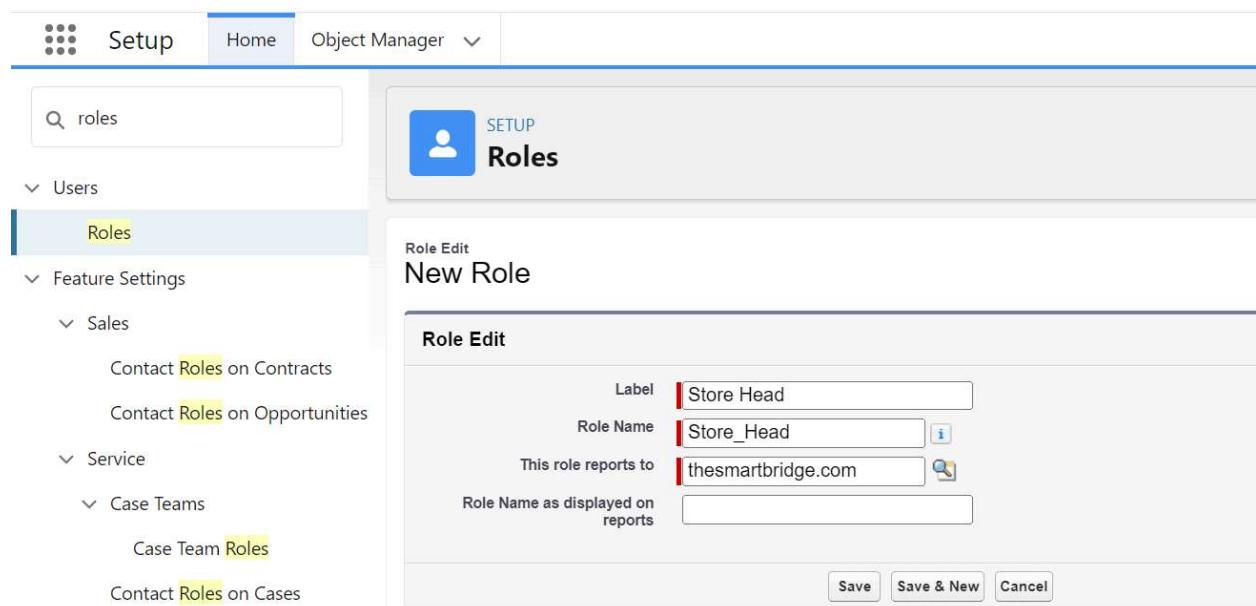
7. Setup Roles

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

Setup Roles

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

Similarly, create one role under Store Head as Billing Operator



Setup Home Object Manager

roles

Users Roles Feature Settings Sales Contact Roles on Contracts Contact Roles on Opportunities Service Case Teams Case Team Roles Contact Roles on Cases

Help for this Page

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

The screenshot shows the 'Roles' section under 'Users'. A new role is being created with the following details:

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

Buttons at the bottom include Save, Save & New, and Cancel.

Your Organization's Role Hierarchy

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

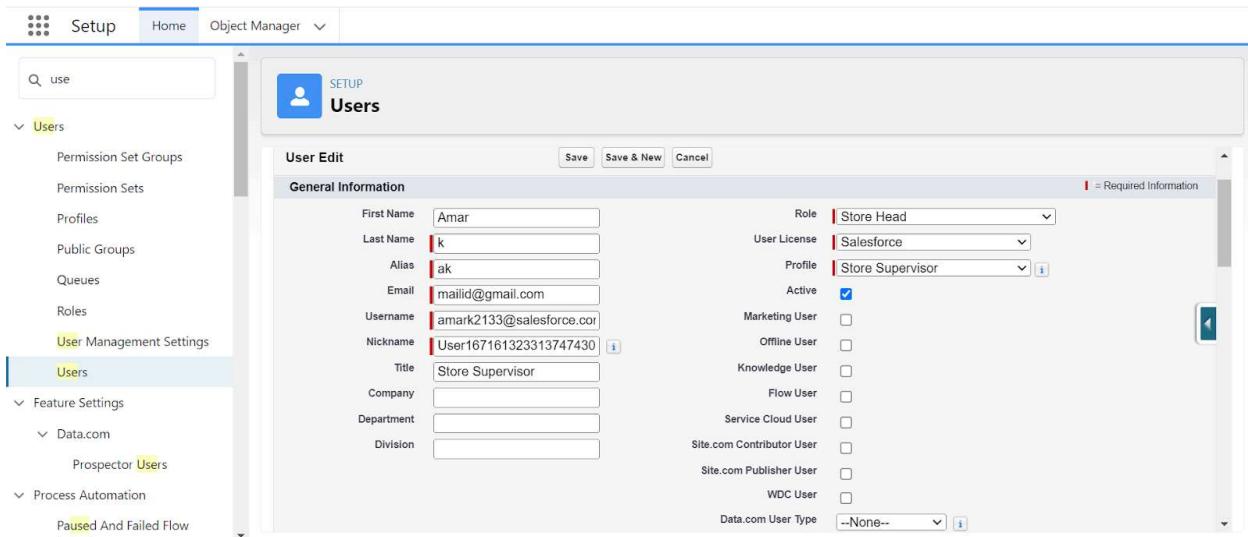


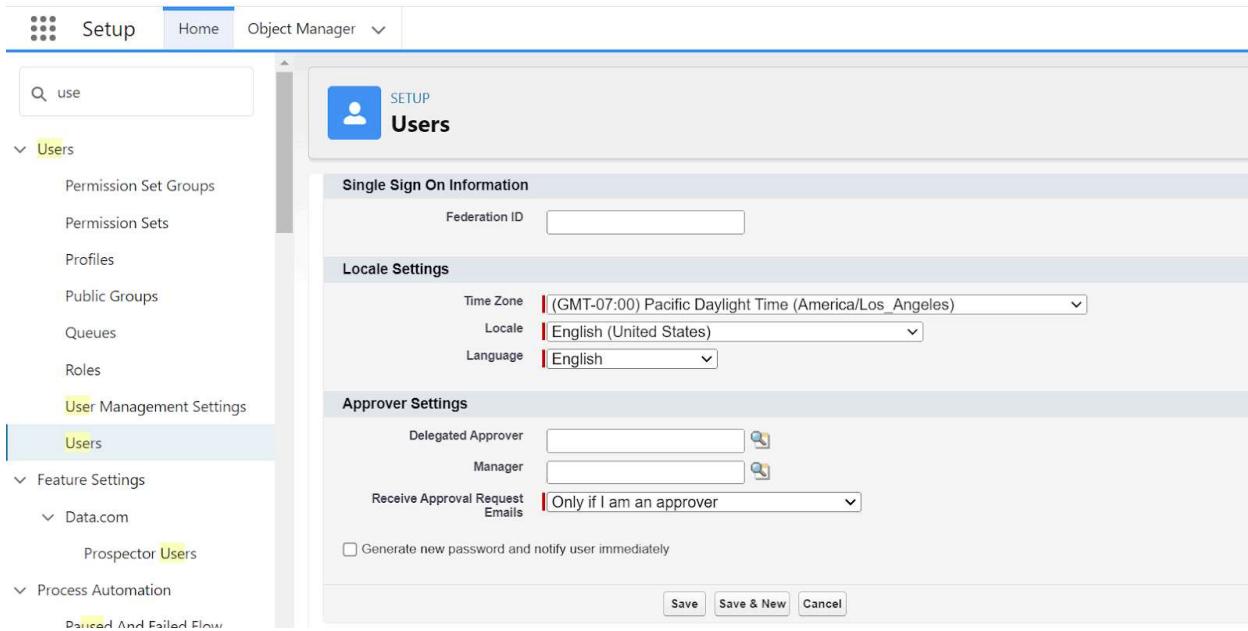
8. Users

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

Creating a User:

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





Second User Creation:

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

Setup Home Object Manager

Q user

Users

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users**
- Feature Settings
- Data.com
 - Prospector Users
- User Interface
 - Action Link Templates
 - Actions & Recommendations
 - App Menu
 - Custom Labels
 - Density Settings
- Global Actions

SETUP Users

User Edit Save Save & New Cancel

General Information

First Name	John	Role	Billing Operator
Last Name	Teddy	User License	Salesforce Platform
Alias	Ttedd	Profile	Billing Operator
Email	teddyjohn@gmail.com	Active	<input checked="" type="checkbox"/>
Username	johnteddy@salesforce.com	Marketing User	<input type="checkbox"/>
Nickname	User167160299867441831	Offline User	<input type="checkbox"/>
Title	Vehicle Manager	Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
		Site.com Publisher User	<input type="checkbox"/>
		WDC User	<input type="checkbox"/>
		Data.com User Type	-None-
		Data.com Monthly Addition Limit	300
		Accessibility Mode (Classic Only)	<input type="checkbox"/>
		High-Contrast Palette on Charts	<input type="checkbox"/>
		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
		Debug Mode	<input type="checkbox"/>
		Make Setup My Default Landing Page	<input type="checkbox"/>

Single Sign On Information

Federation ID

Locale Settings

Time Zone: (GMT-07:00) Pacific Daylight Time (America/Los_Angeles)

Locale: English (United States)

Language: English

Approver Settings

Delegated Approver

Manager

Receive Approval Request Emails: Only if I am an approver

Generate new password and notify user immediately

Save Save & New Cancel

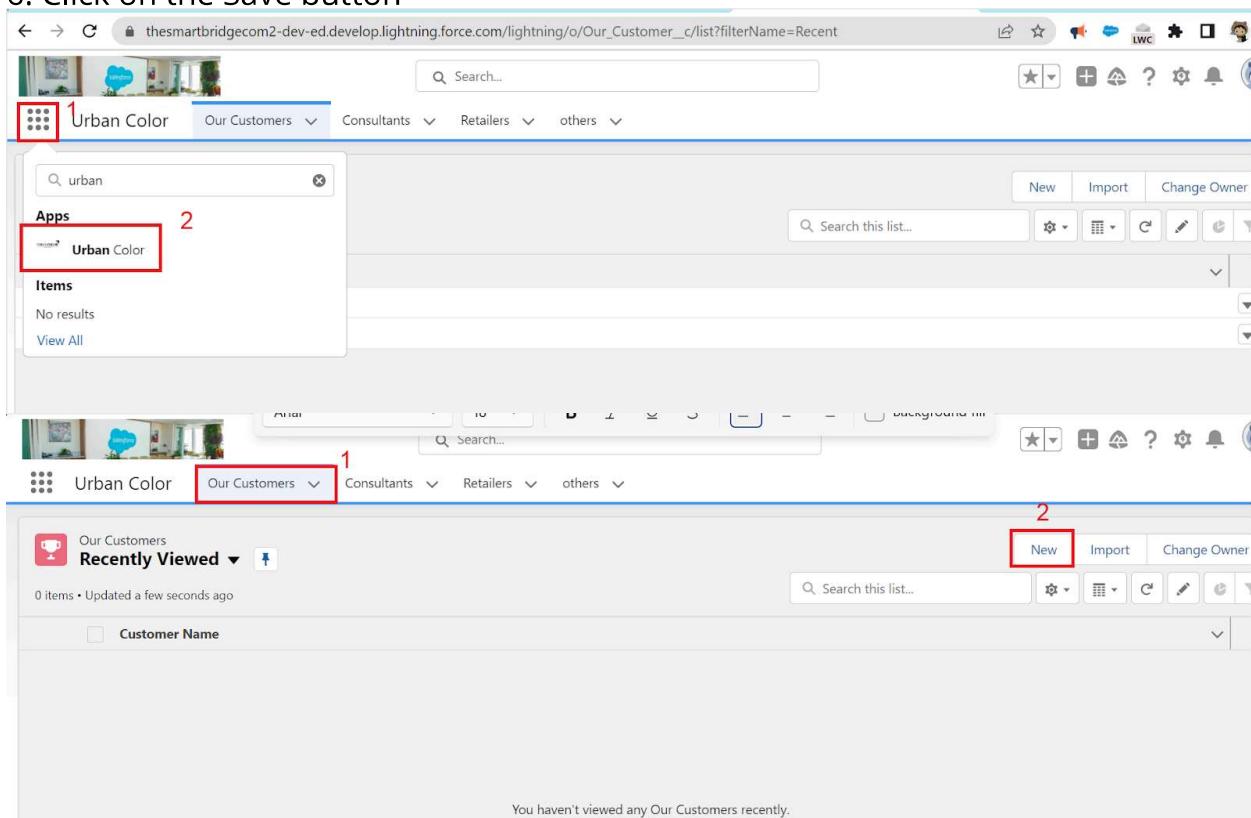
9. User Adoption

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

To ensure effective user adoption and navigation, it's important to educate users on how to interact with the Salesforce database and manage records. The following steps outline key areas to focus on:

Create Our Customer Record

1. Click on the App Launcher on the left side of the screen.
2. Search for Urban Color and click on it.
3. Click on the Our Customer tab.
4. Click the New button.
5. Fill in all the Our Customer record details.
6. Click on the Save button



View Record (Our Customer)

1. Click on the App Launcher on the left side of the screen.
2. Search for Urban Color and click on it.
3. Click on the Our Customer tab.
4. Click on any record name to view the details of the Our Customer

Information

1

*Customer Name

Complete this field.

Customer id

*Phone

Email id

Owner
 Hazari Ajay Kumar

Address

2

Urban Color Our Customers Consultants ▾ Retailers ▾ others ▾

1

Our Customers **Recently Viewed** ▾

2 items • Updated a few seconds ago

	<input type="checkbox"/> Customer Name
1	<input type="checkbox"/> Suresh 2
2	<input type="checkbox"/> Kamal

2

Our Customer
Suresh

Customer Name

Customer id

Phone

Email id

Address

Additional Information

Delete Record (Our Customer)

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

The image consists of two screenshots of a CRM application interface. Both screenshots show the 'Our Customers' list view under the 'Urban Color' app.

Screenshot 1: Shows the main list of customers. The 'Customer Name' column lists 'Suresh' and 'Kamal'. The 'Recently Viewed' section at the top shows 'Suresh' and 'Kamal' as recently viewed items. A red box highlights the 'Our Customers' tab in the top navigation bar. A red number '1' is placed above the list area.

Screenshot 2: Shows a modal dialog box titled 'Delete Our Customer'. The dialog asks 'Are you sure you want to delete this Our Customer?'. It contains 'Cancel' and 'Delete' buttons. A red box highlights the 'Delete' button. A red number '2' is placed above the dialog, and a red number '3' is placed next to the 'Delete' button.

10. Import Data

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

To Import Data

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

The screenshot shows the Salesforce Home page. At the top, there is a search bar with "data impo" typed in. Below the search bar, a red box highlights the "Data Import Wizard" link under the "Integrations" section. A red number "1" is placed next to this link. To the right, there is a "Create" button with a dropdown arrow. Below the search bar, a message says " Didn't find what you're looking for? Try using Global Search." On the left, there is a large circular icon with a paintbrush. In the center, there are four circular icons: one with an upward arrow, one with a document, and one with a checkmark. To the right, there is another circular icon with a checkmark. Below these icons, there are four steps: "1-step: Prepare your data for import", "Choose data to import", "Edit field mapping", and "Review and start import". A red box highlights the "Launch Wizard!" button in the "Choose data to import" step. A red number "2" is placed next to this button.

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 is a "Let's do this" button with a blue dot. Below it, there are three tabs: "Choose data" (which is selected), "Edit mapping", and "Start import". The main area shows a list of objects: Drivers, Fees, others, Consultants, Our Customers, and Properties. The "Consultants" item is highlighted with a red box and a red number "3" is placed next to it. 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 4
- Update existing records
- Add new and update existing records

Where is your data located? ?

6. Click CSV and choose the file Consultant_CS1 which was created 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: ?
-None--

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

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

Where is your data located? ?

Drag CSV file here to upload

CSV 5

Cancel Previous Next

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

Setup Home Object Manager

Almost done

Choose data Edit mapping Start import

Edit Field Mapping: Consultants

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

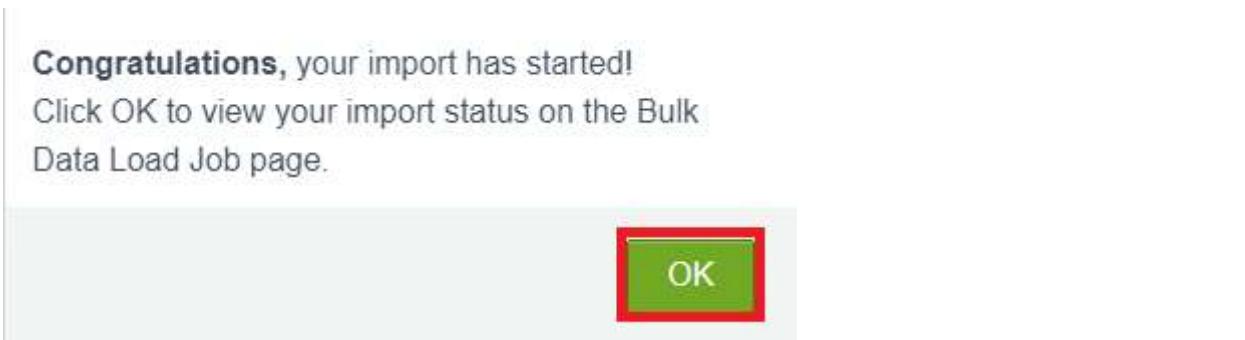
Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	Consultant Name	Consultant Name	Dev Raj	Ajith	Babu
Change	Mobile Number	Mobile Number	984638732	784653673	902839439
Change	Delivery Type	Delivery Type	Self Pickup	Courier	Self Pickup
Change	Address	Address		Hyderabad	
Change	Products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

Cancel Previous Next

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

The screenshot shows a progress bar at the top with three steps: 'Choose data' (blue), 'Edit mapping' (grey), and 'Start import' (green). A red box highlights the main content area. The title 'Review & Start Import' is displayed, along with a message: 'Review your import information and click Start Import.' Below this, there are three sections: 'Your selections:' (listing 'Consultants' and 'Add new records'), 'Your import will include:' (listing 'Mapped fields' with a count of 7), and 'Your import will not include:' (listing 'Unmapped fields' with a count of 0). At the bottom right, there are buttons for 'Cancel', 'Previous', and a red-bordered 'Start Import' button.

9. Click OK on the popup.



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

Batches												
View Request	View Result	Batch ID	Start Time	End Time	Total Processing Time (ms)	API Active Processing Time (ms)	Apex Processing Time (ms)	Records Processed	Records Failed	Retry Count	State Message	Status
View Request	View Result	7512w00000Xqar	6/19/2023, 11:05 PM	6/19/2023, 11:05 PM	103	52	0	9	0	0	Completed	

11. Make sure you have 0 records under the Records Failed column. Note: Perform Field Mapping carefully..

11.What are Reports?

Reports:

Reports in Salesforce are lists of records that meet specific criteria, providing answers to particular questions. These records are displayed in a table format that can be filtered or grouped based on any field.

There are 4 types of report formats in Salesforce:

1. Tabular Reports:

- The most basic report format, displaying rows of records in a table with a grand total.
- Easy to set up but cannot be used to create groups of data or charts and cannot be used in Dashboards.
- Primarily used to generate simple lists or lists with a grand total.

2. Summary Reports:

- The most commonly used report format, allowing the grouping of rows of data, viewing subtotals, and creating charts.

3. Matrix Reports:

- The most complex report format, summarizing information in a grid format.
- Allows records to be grouped by both columns and rows.
- Can be used to generate dashboards and add charts.

4. Joined Reports:

- Allows the creation of different views of data from multiple report types.
- Data in joined reports is organized in blocks, each acting as a subreport with its own fields, columns, sorting, and filtering.
- Used to group and show data from multiple report types in different views.

- A report type cannot include more than 4 objects.
- Once a report is created, its report type cannot be changed.

There are 2 types of report types:

1. Standard Report Types:

- Automatically included with standard objects and custom objects where "Allow Reports" is checked.
- Cannot be customized and automatically include standard and custom fields for each object within the report type.
- Created when an object or a relationship is created.
- Note: Standard report types always have inner joins.

2. Custom Report Types:

- Created by an administrator or user with "Manage Custom Report Types" permission when standard report types cannot specify which records will be available in reports.
- Allows specification of objects that will be available in a particular report.

- The primary object must have a relationship with other objects present in the report type, either directly or indirectly.

There are 3 types of access levels for folders:

1. Viewer:

- Users can see the data in a report but cannot make any changes except cloning it into a new report.

2. Editor:

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

3. Manager:

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

11.1.Create Report

- Click App Launcher.
- Select Urban Color App.
- Click the Reports tab

The screenshot shows the Salesforce App Launcher interface. A red box labeled '1' highlights the 'Setup' icon in the top left. A red box labeled '2' highlights the 'Urban Color' app icon in the list of installed apps. The main content area displays three promotional cards: 'Get Started with Einstein Bots', 'Mobile Publisher', and 'Real-time Collaborative Docs'. On the left sidebar, under the 'Urban Color' app section, there is a 'Most Recently Used' list with 10 items, including 'Customer Details' and 'Reports'. The bottom of the sidebar shows sections for 'ADMINISTRATION' and 'PLATFORM TOOLS'.

4. Click New Report.

The screenshot shows the 'Reports' page within the 'Urban Color' app. A red box labeled '1' highlights the 'Reports' dropdown menu in the top navigation bar. A red box labeled '2' highlights the 'New Report' button in the top right corner of the page. The main content area displays a table with columns for 'Report Name', 'Description', 'Folder', 'Created By', 'Created On', and 'Subscribed'.

5. Select the report type as Consultants and click Start Report.

6. Customize your report by selecting the following columns: Consultant Name, Delivery Type, Products, Payment.

REPORT ▾

New Consultants Report ▾ Consultants

Fields > Outline Filters

Groups GROUP ROWS Add group...

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

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

	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

Save & Run Save Close Run

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

REPORT ▾

New Consultants Report ▾ Consultants

Fields > Outline Filters

Groups GROUP ROWS Add group...

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

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

	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

Save & Run Save Close Run

8. Name the bucket Payment Type.

Edit Bucket Column

* Field: Payment * Bucket Name: Payment type

All Values (4)	Search Values:
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
<input type="checkbox"/> Bucket remaining values as Other	
<input type="button"/> Add Bucket <input type="button"/> Move To <input type="button"/>	
<input type="button"/> Cancel <input type="button"/> Apply	

9. Click Add Bucket and name it NetBanking.

10. Click Add Bucket and name it Cash

Edit Bucket Column

*Field Payment	X	*Bucket Name Payment type																		
<div style="display: flex; justify-content: space-between;"> <div style="flex: 1;"> <p>All Values (4)</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 10%;">Bucket Name</td><td style="width: 90%; text-align: right;">2</td></tr> <tr><td colspan="2">Unbucketed Values (4)</td></tr> <tr><td colspan="2"><input type="checkbox"/> Bucket remaining values as Other</td></tr> <tr><td colspan="2">Add Bucket</td></tr> </table> </div> <div style="flex: 1; padding-left: 20px;"> <p>Search Values</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr><th style="width: 10%;">VALUE</th><th style="width: 90%;">BUCKET</th></tr> </thead> <tbody> <tr><td><input type="checkbox"/> Credit Card</td><td></td></tr> <tr><td><input type="checkbox"/> Debit Card</td><td></td></tr> <tr><td><input type="checkbox"/> Upi</td><td></td></tr> <tr><td><input type="checkbox"/> Cash</td><td></td></tr> </tbody> </table> </div> </div>			Bucket Name	2	Unbucketed Values (4)		<input type="checkbox"/> Bucket remaining values as Other		Add Bucket		VALUE	BUCKET	<input type="checkbox"/> Credit Card		<input type="checkbox"/> Debit Card		<input type="checkbox"/> Upi		<input type="checkbox"/> Cash	
Bucket Name	2																			
Unbucketed Values (4)																				
<input type="checkbox"/> Bucket remaining values as Other																				
Add Bucket																				
VALUE	BUCKET																			
<input type="checkbox"/> Credit Card																				
<input type="checkbox"/> Debit Card																				
<input type="checkbox"/> Upi																				
<input type="checkbox"/> Cash																				
<input type="button" value="Cancel"/> <input type="button" value="Apply"/>																				

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

Edit Bucket Column

*Field Payment	X	*Bucket Name Payment type																		
<div style="display: flex; justify-content: space-between;"> <div style="flex: 1;"> <p>All Values (4)</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 10%;">Net Banking (0)</td><td style="width: 90%; text-align: right;">1</td></tr> <tr><td>Cash (0)</td><td style="text-align: right;">2</td></tr> <tr><td colspan="2">Unbucketed Values (4)</td></tr> <tr><td colspan="2"><input type="checkbox"/> Bucket remaining values as Other</td></tr> </table> </div> <div style="flex: 1; padding-left: 20px;"> <p>Search Values</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr><th style="width: 10%;">VALUE</th><th style="width: 90%;">BUCKET</th></tr> </thead> <tbody> <tr><td><input type="checkbox"/> Credit Card</td><td></td></tr> <tr><td><input type="checkbox"/> Debit Card</td><td></td></tr> <tr><td><input type="checkbox"/> Upi</td><td></td></tr> <tr><td><input type="checkbox"/> Cash</td><td></td></tr> </tbody> </table> </div> </div>			Net Banking (0)	1	Cash (0)	2	Unbucketed Values (4)		<input type="checkbox"/> Bucket remaining values as Other		VALUE	BUCKET	<input type="checkbox"/> Credit Card		<input type="checkbox"/> Debit Card		<input type="checkbox"/> Upi		<input type="checkbox"/> Cash	
Net Banking (0)	1																			
Cash (0)	2																			
Unbucketed Values (4)																				
<input type="checkbox"/> Bucket remaining values as Other																				
VALUE	BUCKET																			
<input type="checkbox"/> Credit Card																				
<input type="checkbox"/> Debit Card																				
<input type="checkbox"/> Upi																				
<input type="checkbox"/> Cash																				
<input type="button" value="Cancel"/> <input type="button" value="Apply"/>																				

.2. Click apply and save

Save Report

1

* Report Name
Consultants Report

Report Unique Name ⓘ
Consultants_Report_hvb

Report Description

2

Folder
Private Reports

Select Folder

3

Cancel

Save

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

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

1. users to apply different data perspectives to a single dashboard.
2. Open the Urban Color Application: Launch the application and navigate to the Dashboards tab.
3. Create a New Dashboard:
 - Click on the "New Dashboard" button.
4. Name Your Dashboard:
 - Enter "Consultant Dashboard" in the name field.
 - Click "Create."

New Dashboard

* Name 3

Consultant Dashboard

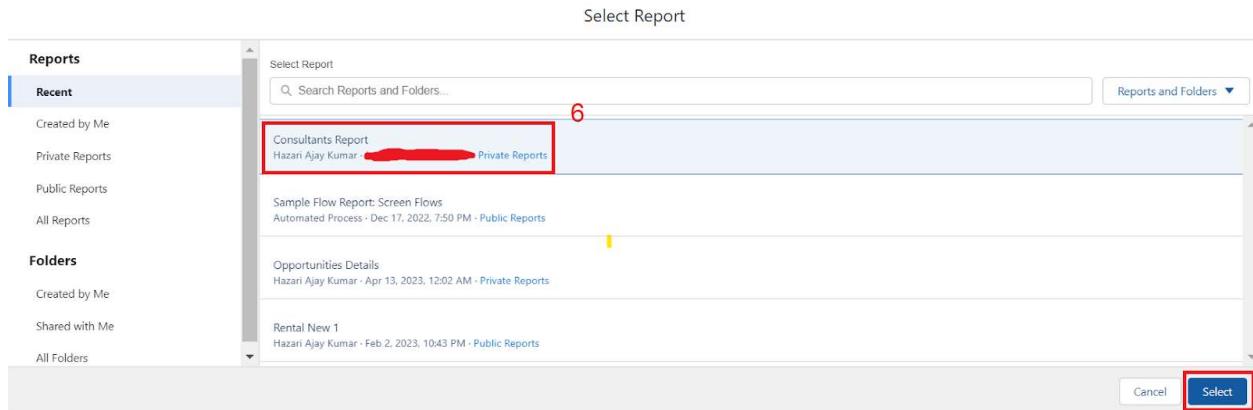
Description

Folder

Select Folder 4

5. Add Components to the Dashboard:

- Click on "+ Component" to add a new component.
- Select the "Consultants Report" you created earlier



6. Choose Data Visualization:

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

Add Component

Report

Consultants Report

Use chart settings from report

Display As

Payment type

X-Axis

Record Count

Preview

Consultants Report

Record Count

0 2 4 6 8

Net Banking 7

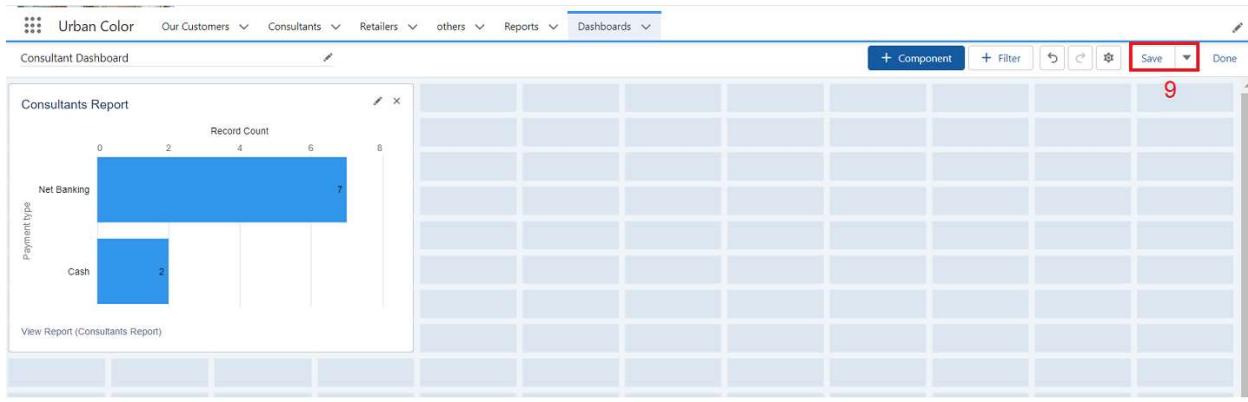
Cash 2

View Report (Consultants Report)

Cancel Add

7. Save Your Dashboard:

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



12.2.View Dashboard

To view the dashboard, follow these steps:

1. Open the App Launcher:

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

2. Search for the Dashboard:

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

3. Navigate to the Dashboard Tab:

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

4. View the Graph:

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

The screenshot shows a user interface for managing dashboards. At the top, there is a navigation bar with links: 'Urban Color', 'Our Customers', 'Consultants', 'Retailers', 'others', 'Reports', 'Dashboards' (which is highlighted with a red box and has a red number '3' above it), and a search bar. Below the navigation bar is a section titled 'Dashboards' with a 'Recent' heading. A table lists three items under 'Recent': 'Consultant Dashboard' (highlighted with a red box and has a red number '4' above it), 'Opportunities Details', and 'Oppurtunity details'. The table has columns for 'Dashboard Name', 'Description', 'Folder', 'Created By', 'Created On', and 'Subscribed'. At the bottom left, there are filters for 'DASHBOARDS', 'Created by Me', 'Private Dashboards', and 'All Dashboards'. At the bottom right, there are buttons for 'New Dashboard' and 'New Folder'.

DASHBOARD	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	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	
	Oppurtunity details		Private Dashboards	Hazari Ajay Kumar	4/12/2023, 11:48 PM	