

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
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 :

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.

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

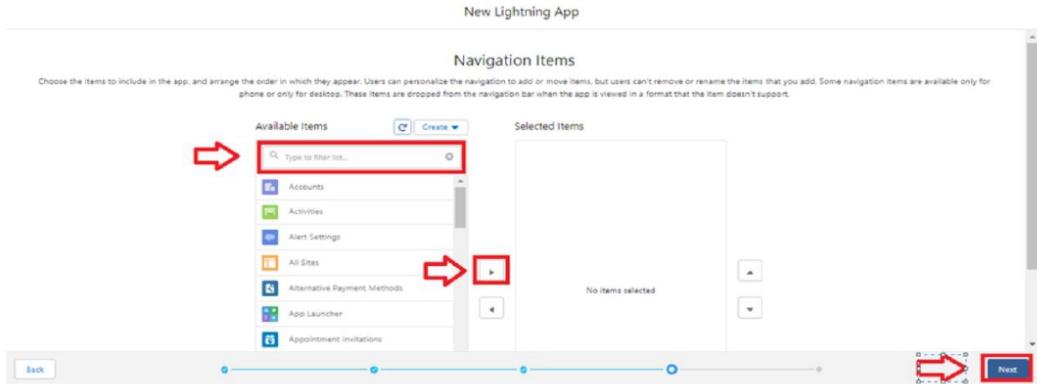
1. Go to setup page --> search “app manager” in quick find --> select “app manager” --> click on New lightning App.

The screenshot shows the 'App Manager' page in the Salesforce setup. A red arrow points to the 'New Lightning App' button at the top right of the main content area. Below it, there's a table listing various apps with columns for 'App Name', 'Developer Name', 'Description', 'Last Modified...', 'App Type', and 'View'. One row is highlighted with a red box, showing 'Analytics Studio' under 'App Name' and 'Analytics' under 'Developer Name'.

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.

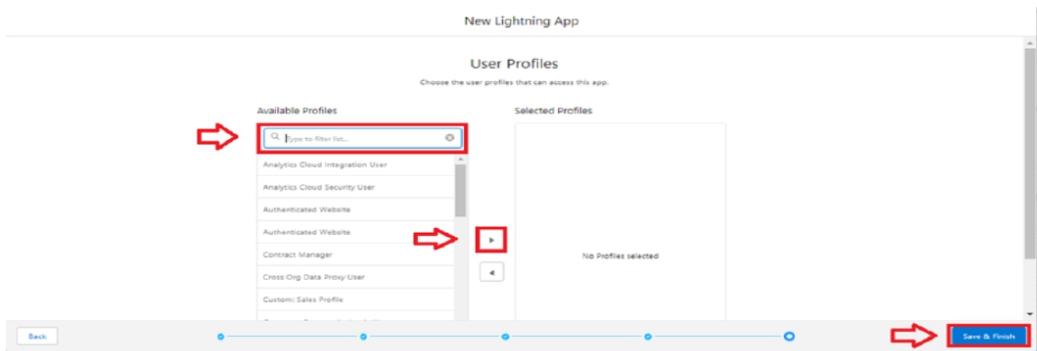
The screenshot shows the 'New Lightning App' configuration page. The 'App Details & Branding' section is visible. A red arrow points to the 'App Name' input field, which contains the placeholder 'Name your app...'. Another red arrow points to the 'Primary Color Hex Value' input field, which has '#0070C2' entered. At the bottom right, a red box highlights the 'Next' button.

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

3. Scroll down to the Custom object permission and give all access to the Consultants, Others, Our Customers, Retailers object.
4. Click on Save.
5. Similarly Create operator profile ,Clone Salesforce Platform user and give access only for Billing Operator.

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 first screenshot shows the 'Role Edit' screen for creating a new role named 'Store Head'. It includes fields for 'Label' (Store Head), 'Role Name' (Store_Head), and 'This role reports to' (thesmartbridge.com). The second screenshot shows the same process for creating a role named 'Billing Operator'. The third screenshot displays the 'Your Organization's Role Hierarchy' tree, which includes nodes for 'thesmartbridge.com', 'CEO', 'Store Head', and 'Billing Operator', each with 'Edit', 'Del', and 'Assign' options.

- 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 consists of two vertically stacked screenshots of the Salesforce Setup interface, specifically the 'User Edit' screen under the 'Users' tab.

Screenshot 1 (Top): General Information

- General Information:**
 - First Name: Amar
 - Last Name: k
 - Alias: ak
 - Email: mailid@gmail.com
 - Username: amark2133@salesforce.com
 - Nickname: User167161323313747430
 - Title: Store Supervisor
 - Company:
 - Department:
 - Division:
- Role:** Store Head
- User License:** Salesforce
- Profile:** Store Supervisor
- Active:**
- Marketing User:**
- Offline User:**
- Knowledge User:**
- Flow User:**
- Service Cloud User:**
- Site.com Contributor User:**
- Site.com Publisher User:**
- WDC User:**
- Data.com User Type:** -None--

Screenshot 2 (Bottom): Approver Settings

- Single Sign On Information:** Federation ID: [empty]
- Locale Settings:**
 - Time Zone: (GMT-07:00) Pacific Daylight Time (America/Los_Angeles)
 - Locale: English (United States)
 - Language: English
- Approver Settings:**
 - Delegated Approver: [empty]
 - Manager: [empty]
 - Receive Approval Request Emails: Only if I am an approver
 - Generate new password and notify user immediately

Task 8 : Creating/Modifying Records :

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

Steps to Create a Record:

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

Steps to Modify a Record:

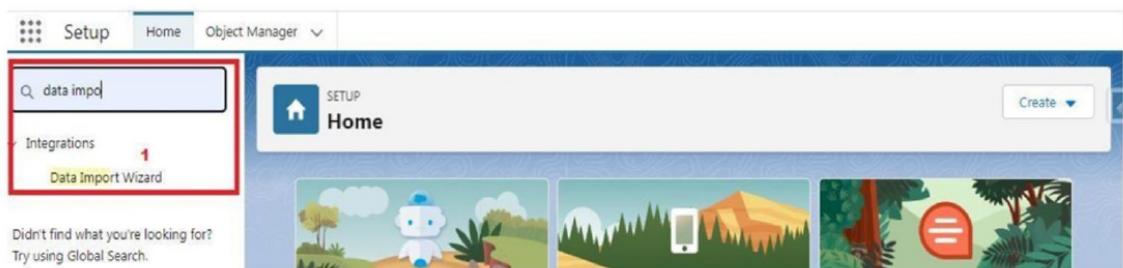
1. **Find the Record:**
 - Locate the record you want to modify by using the object’s list view, search function, or related lists.
2. **Open the Record:**
 - Click on the record’s name to open it and view its details.
3. **Click “Edit”:**
 - In the record’s detail view, click the “Edit” button to enable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

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

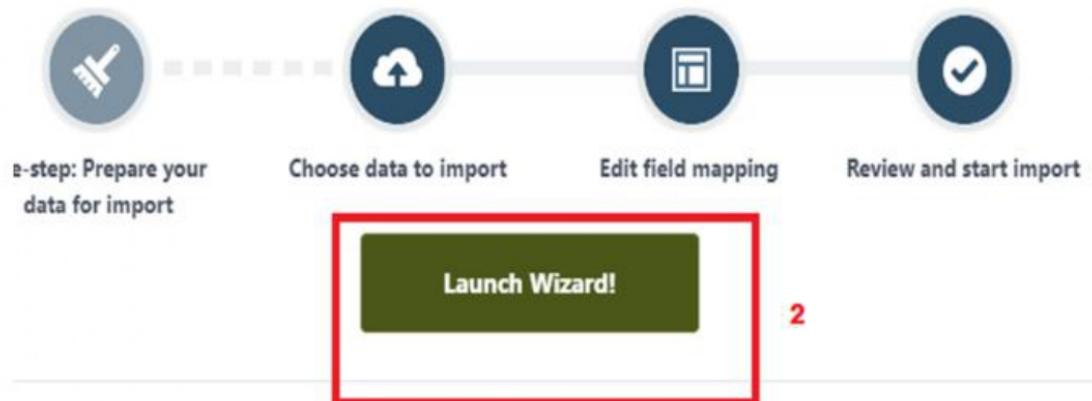
► **Task 9: Importing Data :**

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

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



3. Click Launch Wizard!



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

A screenshot of the 'Choose data' step of the Data Import Wizard. It has three tabs: 'Choose data' (selected), 'Edit mapping', and 'Start import'.

- Choose data:** Shows 'Standard objects' (Attendees, Buyers, Customers, Departments) and 'Custom objects' (Consultant).
- Edit mapping:** Shows 'Add new records' (selected), 'Match by:' dropdown ('None'), 'Which User field in your file designates record owners?' dropdown ('None'), and 'Trigger workflow rules and processes?' checkbox (unchecked).
- Start import:** Shows 'Where is your data located?' with a 'Drag CSV file here to upload' area containing a 'CSV' file icon, highlighted with a red box and labeled '5'.

At the bottom, there are 'Cancel', 'Previous', and a green 'Next' button.

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

Edit 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	Balaji
Change	Mobile Number	Mobile Number	98456732	78455673	90235468
Change	Delivery Type	Delivery Type	Self Pickup	Courier	Self Pickup
Change	Address	Address	Hyderabad	Chennai	Face Pack
Change	Products	Products	Lipstick	Compact	Credit Card
Change	Payment	Payment	Cash	UPI	BBM
Change	Email	Email	ajith@gmail.com	bbm24@gmail.com	bbm24@gmail.com

Buttons: Cancel, Previous, **Next Step**, Edit mapping, Start import, Help for this page

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

Review & Start Import

Review your import information and click Start Import.

Your selections:

- Consultants ✓
- Add new records ✓
- Consultants - Sheet1 (2).csv ✓

Your import will include:

7 Mapped fields 0 Unmapped fields

Your import will not include:

Cancel Previous **Start Import**

9. Click OK on the popup.
 10. Scroll down the page and verify that your data has been imported under batches.
 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 screenshot shows the Salesforce App Launcher interface. On the left, there's a sidebar with various menu items like Setup, Home, Object Manager, and several sections under Administration, Platform Tools, and Reports. The 'Urban Color' app is highlighted with a red box and has the number '2' next to it, indicating new items. The main area displays three cards: 'Get Started with Einstein Bots', 'Mobile Publisher', and 'Real-time Collaborative Docs'. Below these cards, there's a section titled 'Most Recently Used' with a table showing 'Customer Details' (Custom Field Definition) and 'Consultant' (Object).

This screenshot shows the 'Urban Color' app's internal interface. At the top, there's a navigation bar with links for 'Our Customers', 'Consultants', 'Retailers', 'Others', 'Reports', 'Dashboards', and 'Help'. The 'Reports' tab is highlighted with a red box and has the number '1'. Below the navigation, there's a search bar and a table with columns for 'Report Name', 'Description', 'Folder', 'Created By', 'Created On', and 'Retired'. A red box highlights the 'Retired' column header, which has the number '2' next to it.

REPORT ▾
New Consultants Report ▾ Consultants

Fields > Outline Filters

Groups GROUP ROWS Add group... Q

Columns Add column... Q

Consultant-Consultant Name X
Delivery Type X
Products X
Payment X

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

Consultant-Consultant Name	Delivery Type	Products	Payment
Dev Raj	Self Pickup	Lipstick	Cash
Ajith	Courier	Compact	Upi
Balu	Self Pickup	Face Pack	Credit Card
Chitra	Courier	Eye Liner	Debit Card
Swathi	Courier	Nail Polish	Upi
Fraaud	Self Pickup	Eye Liner	Upi
Ajay Kumar	Courier	Lip Balm	Debit Card
Shankar	Self Pickup	Face Pack	Cash
Sandeep	Courier	Eye Liner	Upi

Save & Run Save Close Run Update Preview Automatically

REPORT ▾
New Consultants Report ▾ Consultants

Fields > Outline Filters

Groups GROUP ROWS Add group... Q

Columns Add column... Q

Consultant-Consultant Name X
Delivery Type X
Products X
Payment X

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Consultant-Consultant Name	Delivery Type	Products	Payment
Dev Raj	Self Pickup	Lipstick	Cash
Ajith	Courier	Compact	Upi
Balu	Self Pickup	Face Pack	Credit Card
Chitra	Courier	Eye Liner	Debit Card
Swathi	Courier	Nail Polish	Upi
Fraaud	Self Pickup	Eye Liner	Upi
Ajay Kumar	Courier	Lip Balm	Debit Card
Shankar	Self Pickup	Face Pack	Cash
Sandeep	Courier	Eye Liner	Upi

Sort Ascending Sort Descending Group Rows by This Field

Bucket This Column Show Unique Count Move Left Move Right Remove Column

Update Preview Automatically

Edit Bucket Column

* Field * Bucket Name

All Values (4)	Search Values <input type="text"/>										
Unbucketed Values (4)	<table border="1"> <thead> <tr> <th>VALUE</th> <th>BUCKET</th> </tr> </thead> <tbody> <tr><td>Credit Card</td><td></td></tr> <tr><td>Debit Card</td><td></td></tr> <tr><td>Upi</td><td></td></tr> <tr><td>Cash</td><td></td></tr> </tbody> </table>	VALUE	BUCKET	Credit Card		Debit Card		Upi		Cash	
VALUE	BUCKET										
Credit Card											
Debit Card											
Upi											
Cash											
<input type="checkbox"/> Bucket remaining values as Other											
<input type="button" value="Add Bucket"/>	<input type="button" value="Move To"/>										
<input type="button" value="Cancel"/> <input type="button" value="Apply"/>											

Edit Bucket Column

* Field	* Bucket Name
Payment	Payment type
All Values (4)	<input type="text"/> Bucket Name 2
Unbucketed Values (4)	
<input type="checkbox"/> Bucket remaining values as Other Add Bucket Move To ▾	

* Bucket Name

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

Cancel Apply

Edit Bucket Column

* Field	* Bucket Name
Payment	Payment type
All Values (4)	Net Banking (0) edit Cash (0) edit
Unbucketed Values (4)	
<input type="checkbox"/> Bucket remaining values as Other Add Bucket Move To ▾	

* Bucket Name

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

Cancel Apply

Edit Bucket Column

* Field	* Bucket Name
Payment	Payment type
All Values (4)	Net Banking (0) edit Cash (0) edit
Unbucketed Values (4)	
<input type="checkbox"/> Bucket remaining values as Other Add Bucket Move To ▾	

* Bucket Name

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 Payment	*Bucket Name Payment type														
All Values (4) Net Banking (0) Edit Delete Cash (0) Edit Delete Unbucketed Values (4)	<div style="border: 1px solid #ccc; padding: 5px; width: 100%;"> <div style="display: flex; justify-content: space-between;"> Search Values X </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 5%;">VALUE</th> <th style="width: 95%;">BUCKET</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/> Credit Card</td> <td></td> </tr> <tr> <td><input checked="" type="checkbox"/> Debit Card</td> <td></td> </tr> <tr> <td><input type="checkbox"/> Net Banking</td> <td></td> </tr> <tr> <td>Cash</td> <td></td> </tr> <tr> <td>Unbucketed Values</td> <td></td> </tr> <tr> <td>New Bucket</td> <td></td> </tr> </tbody> </table> </div>	VALUE	BUCKET	<input checked="" type="checkbox"/> Credit Card		<input checked="" type="checkbox"/> Debit Card		<input type="checkbox"/> Net Banking		Cash		Unbucketed Values		New Bucket	
VALUE	BUCKET														
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Edit Bucket Column

*Field Payment	*Bucket Name Payment type										
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VALUE	BUCKET										
<input type="checkbox"/> Credit Card	Net Banking										
<input type="checkbox"/> Debit Card	Net Banking										
<input type="checkbox"/> Upi	Net Banking										
<input checked="" type="checkbox"/> Cash											
<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

The screenshot shows a report configuration interface. On the left, there's a sidebar with 'Fields' and sections for 'Groups' (with 'Payment type' highlighted), 'Columns' (with 'Consultant: Consultant Name', 'Delivery Type', 'Products', and 'Payment'), and 'Subtotal'. The main area is titled 'Net Banking (7)' and shows a preview of data with columns: Consultant: Consultant Name, Delivery Type, Products, and Payment. The preview includes rows for Ajith, Babu, Chitra, Swathi, Prasad, Ajay Kumar, Sandeep, Dev Raj, and Shankar.

The screenshot shows a 'Save Report' dialog box. It has fields for 'Report Name' (labeled 1) containing 'Consultants Report', 'Report Unique Name' (labeled 2) containing 'Consultants_Report_Uvib', and a 'Folder' dropdown (labeled 2) set to 'Private Reports'. At the bottom right are 'Cancel' and 'Save' buttons (labeled 3).

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. The 'Urban Color' app is selected and highlighted (labeled 2). The launcher also lists other apps like Setup, Home, Object Manager, Themes, and Utilities. Below the launcher, there are three cards: 'Get Started with Einstein Bots', 'Mobile Publisher', and 'Real-time Collaborative Docs'.

The screenshot shows the 'Reports' tab in the Urban Color app (labeled 3). It displays a list of recent reports. One report, 'Consultants Report' (labeled 4), is highlighted. The list includes:

- Report Name: Consultants Report
- Description: Which flows run, what's the status of each interview, and how long do users take to complete the screens?
- Folder: Private Reports
- Created By: Ajay Kumar
- Created On: 10/17/2022, 7:50 PM
- Subscribed: [redacted]

 Other reports listed are 'Sample Flow Report: Screen Flow', 'Opportunities Details', and 'Rental Revs 1'.

► **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.

The image consists of three screenshots illustrating the steps to create a new dashboard and add a report component:

- Screenshot 1:** Shows the main application interface with the "Dashboards" tab highlighted (red box). The top navigation bar includes "Urban Color", "Our Customers", "Consultants", "Retailers", "others", "Reports", and "Dashboards". A search bar and buttons for "New Dashboard" and "New Folder" are also visible.
- Screenshot 2:** Shows the "New Dashboard" creation dialog. The "Name" field contains "Consultant Dashboard" (red box). The "Description" field is empty. The "Folder" section shows "Private Dashboards" selected (red box), with a "Select Folder" button next to it. The "Create" button is highlighted with a red box.
- Screenshot 3:** Shows the "Select Report" dialog. The "Recent" tab is selected in the sidebar. A report titled "Consultants Report" by "Haran Ajay Kumar" is listed under "Private Reports" (red box). The "Select" button at the bottom right is highlighted with a red box.

Add Component

Report
Consultants Report

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 \(Consultants Report\)](#)

Urban Color Our Customers Consultants Retailers others Reports Dashboards Done

Consultant Dashboard

+ component + filter Done

Consultants Report

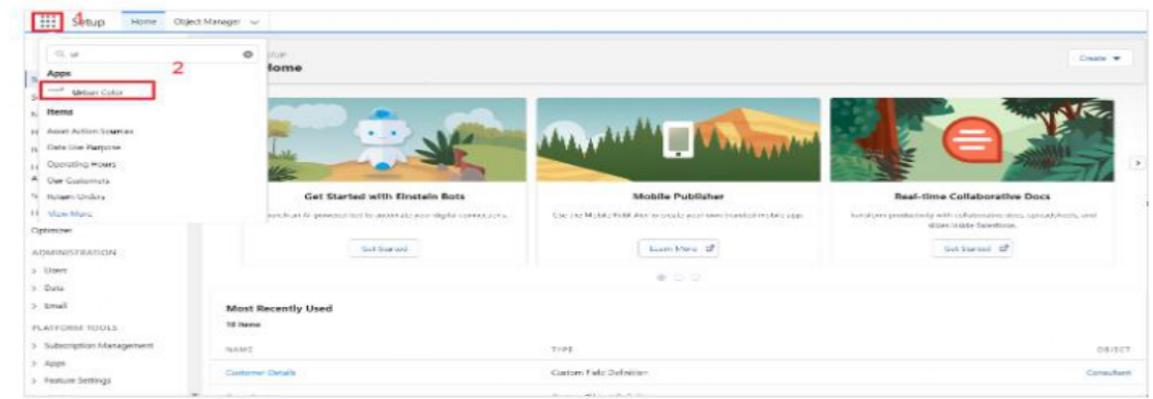
Record Count

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 Dashboards page. At the top, there are navigation 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 'Dashboards'. Below this is a search bar and buttons for 'New Dashboard' and 'New Folder'. The main area displays a table of dashboards under the 'Recent' tab. The table columns are: Dashboard Name, Description, Folder, Created By, Created On, and Subscribed. The data in the table is as follows:

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