

Cosmetics Store Management

by:

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Abstract

Cosmetics Store Management System

A "Cosmetics Store Management System" is a software solution designed to streamline and optimize the operations of a cosmetics retail business. This system facilitates the management of key activities such as inventory control, sales tracking, customer management, supplier coordination, and financial monitoring. By providing a centralized platform, it enhances operational efficiency, reduces manual errors, and ensures accurate record-keeping. The system supports product categorization based on brands, types, and features, enabling seamless management of stock levels, product details, and pricing. It also integrates with sales functions, offering point-of-sale (POS) capabilities, generating invoices, and tracking customer purchases.

One of the key functionalities of this system is **inventory control**, which allows store managers to monitor stock levels, track product expiration dates, and manage replenishment efficiently. Products can be categorized by various attributes such as brand, type (e.g., skincare, makeup, fragrance), and customer preferences, ensuring easy retrieval of data and better inventory organization. This feature ensures that popular products remain in stock and minimizes the risk of overstocking less-demanded items.

Additional features include customer relationship management (CRM), which stores customer data for targeted promotions and personalized service, along with reporting tools that offer insights into sales trends, product performance, and profitability. The system can further integrate with e-commerce platforms to manage online sales alongside in-store operations. Overall, a Cosmetics Store Management System helps cosmetics retailers deliver a better shopping experience while improving business efficiency and growth.

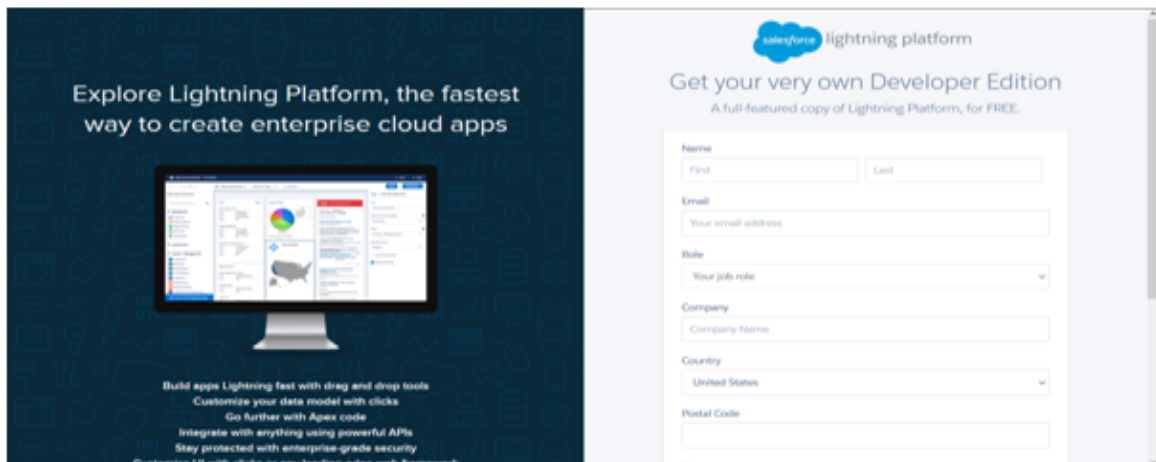
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1. Creating a Developer Account in Salesforce

Step 1: Sign Up for a Developer Org

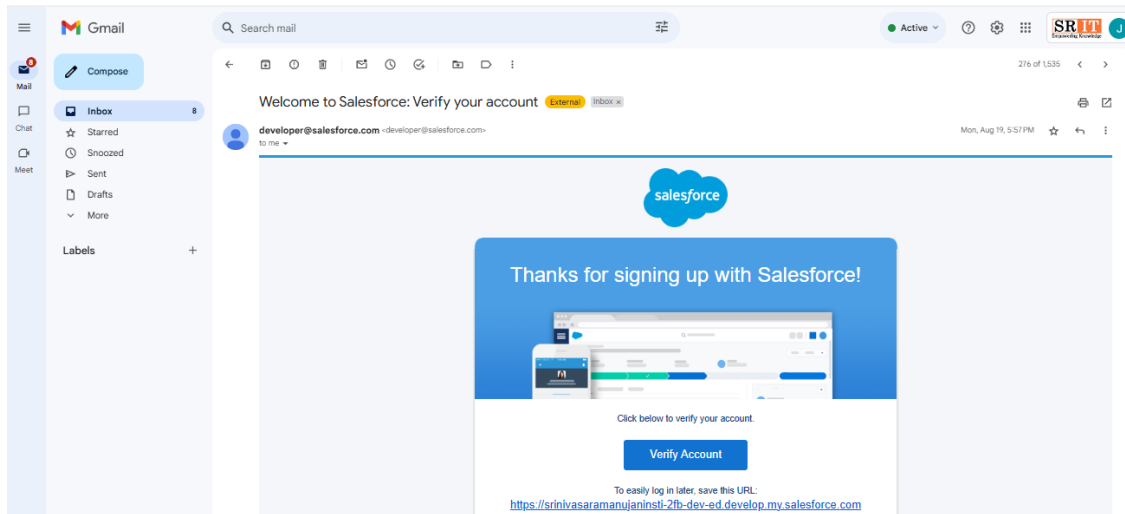
1. Go to developers.salesforce.com/signup.
2. Click on "Sign Up."
3. Fill out the Sign-Up Form with the following details:
 - **First Name & Last Name**
 - **Email**
 - **Role:** Developer
 - **Company:** [Your College Name]
 - **Country:** India
 - **Postal Code:** [Your Pin Code]
 - **Username:** Create 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

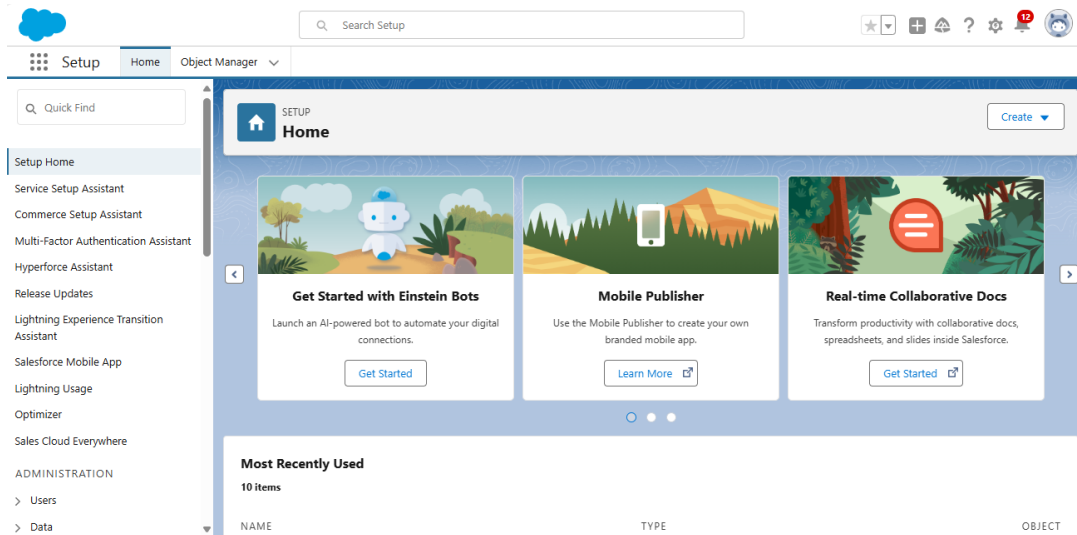
1. Go to your email inbox that you used for signing up.
2. Find the verification email from Salesforce and click on the "Verify Account" link to activate your account.

- **Note:** The email might take 5-10 minutes to arrive.



Step 3: Login to Your Salesforce Account

1. Go to login.salesforce.com.
2. Enter your username and password created during the sign-up process.
3. Login to access your Salesforce Developer account.
 - You will see the home page after logging in.



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.

The screenshot shows the 'Our Customer' object definition page in Salesforce Setup. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, Triggers, Flow Triggers, and Validation Rules. The main content area is titled 'Custom Object Definition Edit' and includes sections for 'Custom Object Information', 'Enter Record Name Label and Format', and 'Optional Features'. In the 'Optional Features' section, the 'Allow Reports' checkbox is checked. The 'Record Name' is set to 'Our Customer' and the 'Data Type' is 'Text'.

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**.

The screenshot shows the 'Object Manager' page in Salesforce Setup. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar at the top right contains the text 'cus'. Below the navigation bar, there is a table listing objects. The table has columns for 'LABEL', 'API NAME', 'TYPE', 'DESCRIPTION', 'LAST MODIFIED', and 'DEPLOYED'. The table contains two rows: 'Customer' (Standard Object) and 'Our Customer' (Custom Object). A red arrow points to the 'Our Customer' row.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Customer	Customer	Standard Object			
Our Customer	Our_Customer_c	Custom Object		21/09/2024	✓

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.

The screenshot shows the Salesforce 'Setup' page with the 'Object Manager' tab selected. The 'Consultant' object is being defined. The 'Details' sidebar on the left lists various configuration options. The main content area is titled 'New Custom Object: Consultant' and contains the 'Custom Object Definition Edit' form. The form includes sections for 'Custom Object Information', 'Enter Record Name Label and Format', and 'Optional Features'. The 'Custom Object Information' section has fields for 'Label' (Consultant), 'Plural Label' (Consultants), and 'Record Name' (Consultant). The 'Enter Record Name Label and Format' section has a 'Record Name' field (Consultant) and a 'Data Type' dropdown (Text). The 'Optional Features' section has checkboxes for 'Allow Reports', 'Allow Activities', and 'Track Field History', all of which are checked.

Setup Home Object Manager Consultant

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
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules
- Triggers
- Flow Triggers
- Validation Rules

New Custom Object
Consultant

Custom Object Definition Edit Save Save & New Cancel

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports. Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label Consultant Example: Account

Plural Label Consultants Example: Accounts

Starts with lower case

The Object Name is used when referencing the object via the API. Object Name Consultant Example: Account

Description

Context-sensitive help setting

Open the standard Salesforce.com Help & Training window

Open a window using a Visualforce page

Context Name

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called Record Name.

Record Name Consultant Example: Account Name

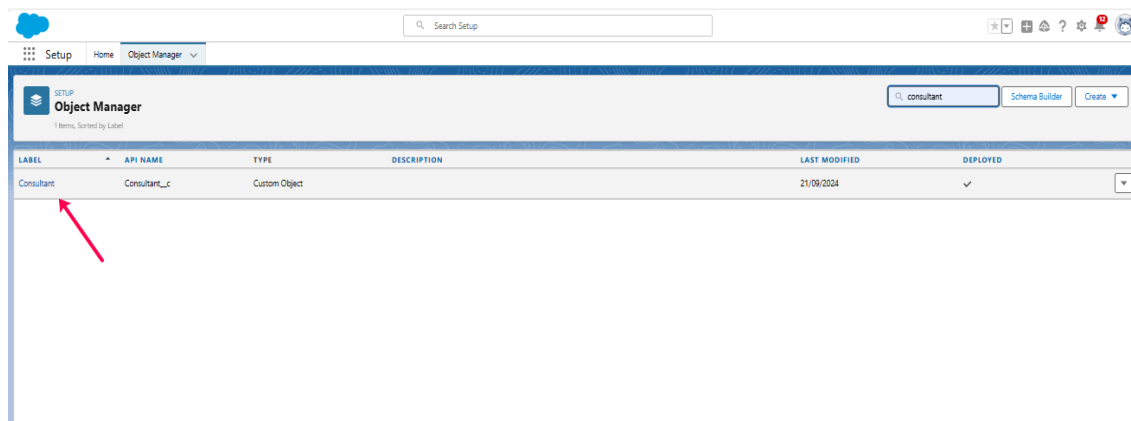
Data Type Text Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.

Optional Features

- ☒ Allow Reports
- ☒ Allow Activities
- ☒ Track Field History

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 **Retailers** 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 "Retailers" Object

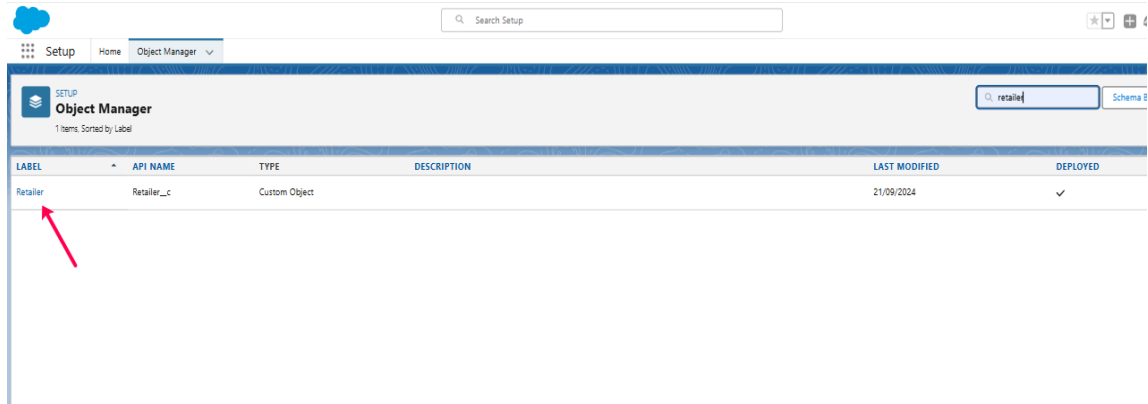
1. On the **Custom Object Definition** page, enter the following details:
 - **Label:** Retailer
 - **Plural Label:** Retailers
 - **Record Name:** Retailer
2. **Check the following boxes:**
 - **Allow Reports**
 - **Allow Search**
3. **Click "Save"** to create the object.

The screenshot shows the Salesforce 'Custom Object Definition' page for the 'Retailer' object. The page is titled 'Retailer' and has a sidebar with navigation links: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, Triggers, Flow Triggers, and Validation Rules. The main content area is titled 'Custom Object Definition Edit' and contains the following fields and options:

- Label:** Retailer (Example: Account)
- Plural Label:** Retailers (Example: Accounts)
- Starts with vowel sound:** ☐
- The Object Name is used when referencing the object via the API:** Retailer (Example: Account)
- Description:** (Empty text area)
- Context-sensitive help setting:** ☒ Open the standard Salesforce.com Help & Training window, ☐ Open a window using a Visualforce page
- Enter Record Name Label and Format:**
 - Record Name:** Retailers (Example: Account Name)
 - Date Type:** Text (Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.)
- Optional Features:**
 - ☒ Allow Reports
 - ☐ Allow Activities
 - ☐ Track Field History

Step 5: Create a Custom Tab for "Retailers"

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 **Retailers**.
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**.



2.4.Creating the Others 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.

The screenshot shows the Salesforce Setup interface, specifically the Object Manager section. The 'other' custom object is selected. The 'Custom Object Definition Edit' form is displayed, showing fields for Label, Plural Label, Object Name, and Description. The 'Enter Record Name Label and Format' section is also visible, showing the Record Name field set to 'other' and the Data Type set to 'Text'. The 'Optional Features' section includes checkboxes for Allow Reports, Allow Auditing, Track Field History, Allow in Chatter Groups, and Enable Lightning.

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**.

The screenshot shows the Salesforce Setup interface, specifically the Object Manager section. The 'Custom Object Tabs' list is displayed, showing a single tab named 'other' for the 'other_c' object. A red arrow points to the 'other' tab in the list.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
other	other_c	Custom Object		21/09/2024	✓

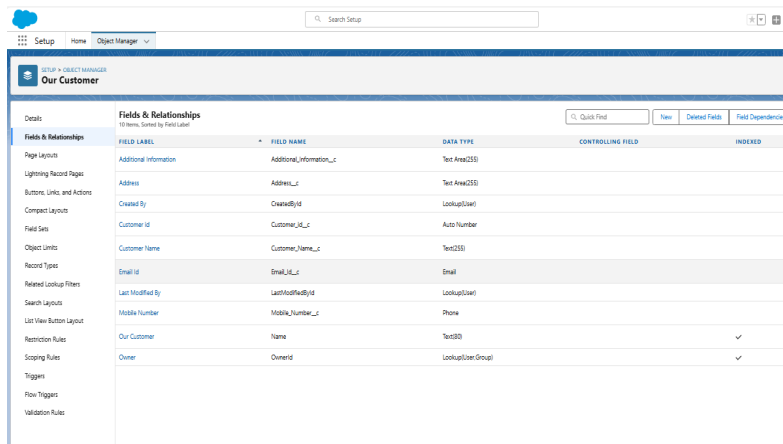
3. Fields and Relationships

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 a specific data type:

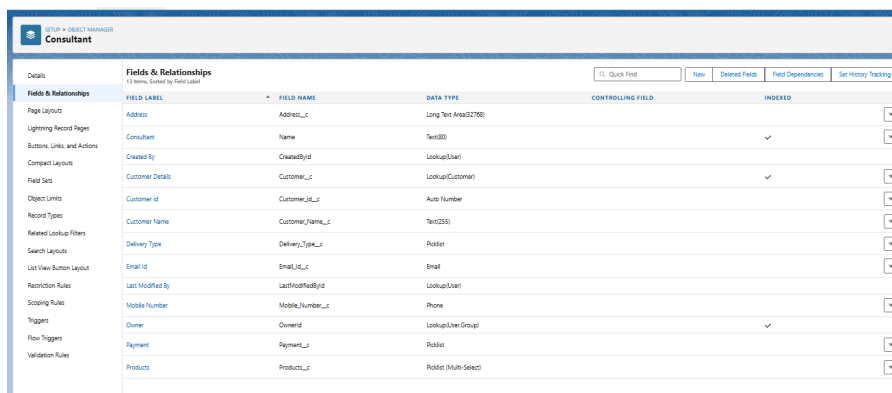


The screenshot shows the Salesforce Setup interface for the 'Our Customer' object. The 'Fields & Relationships' section is active, displaying a table of fields. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are: Additional Information (Text Area(255)), Address (Text Area(255)), Created By (Lookup(User)), Customer Id (Auto Number), Customer Name (Text(255)), Email Id (Email), Last Modified By (Lookup(User)), Mobile Number (Phone), Our Customer (Text(50)), and Owner (Lookup(User Group)).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Additional Information	Additional_Information__c	Text Area(255)		
Address	Address__c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
Customer Id	Customer_Id__c	Auto Number		
Customer Name	Customer_Name__c	Text(255)		
Email Id	Email_Id__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Mobile Number	Mobile_Number__c	Phone		
Our Customer	Name	Text(50)		✓
Owner	OwnerId	Lookup(User Group)		✓

3.2.Fields in Consultants objects

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

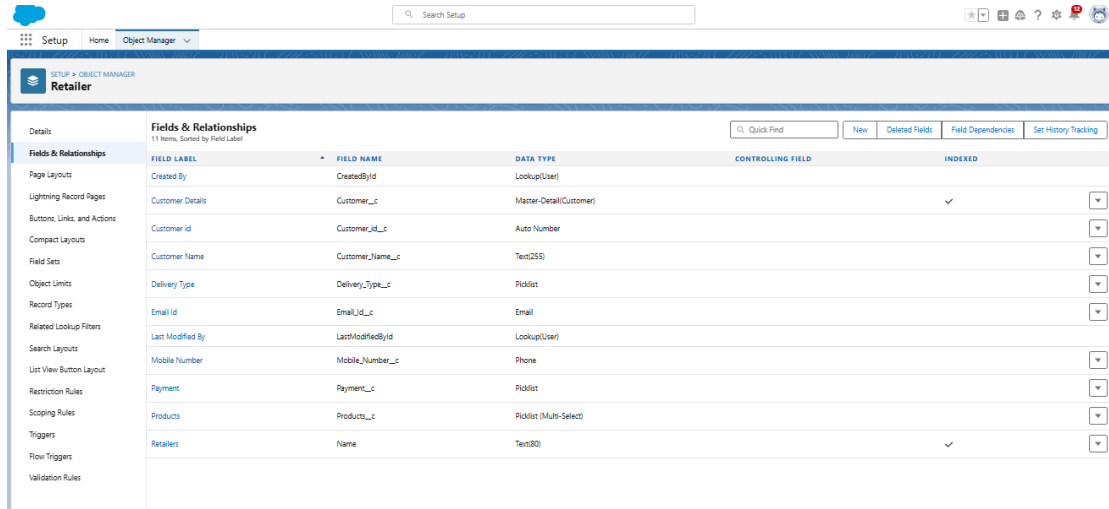


The screenshot shows the Salesforce Setup interface for the 'Consultant' object. The 'Fields & Relationships' section is active, displaying a table of fields. The table has columns for Field Label, Field Name, Data Type, Controlling Field, Indexed, and a dropdown menu. The fields listed are: Address (Long Text Area(2700)), Consultant (Text(50)), Created By (Lookup(User)), Customer Details (Lookup(Customer)), Customer Id (Auto Number), Customer Name (Text(255)), Delivery Type (Picklist), Email Id (Email), Last Modified By (Lookup(User)), Mobile Number (Phone), Owner (Lookup(User Group)), Payment (Picklist), and Products (Picklist (Multi-Select)).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED	
Address	Address__c	Long Text Area(2700)			
Consultant	Name	Text(50)		✓	
Created By	CreatedById	Lookup(User)			
Customer Details	Customer__c	Lookup(Customer)		✓	
Customer Id	Customer_Id__c	Auto Number			
Customer Name	Customer_Name__c	Text(255)			
Delivery Type	Delivery_Type__c	Picklist			
Email Id	Email_Id__c	Email			
Last Modified By	LastModifiedById	Lookup(User)			
Mobile Number	Mobile_Number__c	Phone			
Owner	OwnerId	Lookup(User Group)		✓	
Payment	Payment__c	Picklist			
Products	Products__c	Picklist (Multi-Select)			

3.3.Fields in Retailers objects

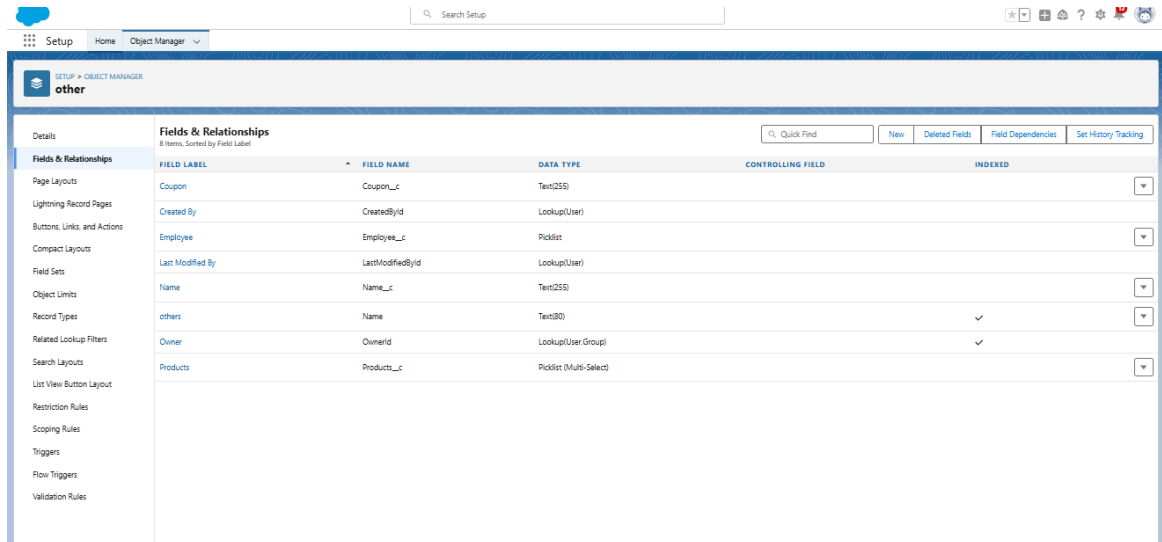
The following fields are defined in the "Retailers" object, each with a specific data type:



FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Customer Details	Customer_c	Master-Detail(Customer)		✓
Customer Id	Customer_Id_c	Auto Number		
Customer Name	Customer_Name_c	Text(255)		
Delivery Type	Delivery_Type_c	Picklist		
Email Id	Email_Id_c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Mobile Number	Mobile_Number_c	Phone		
Payment	Payment_c	Picklist		
Products	Products_c	Picklist (Multi-Select)		
Retailers	Name	Text(80)		✓

3.4.Fields in Others objects

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



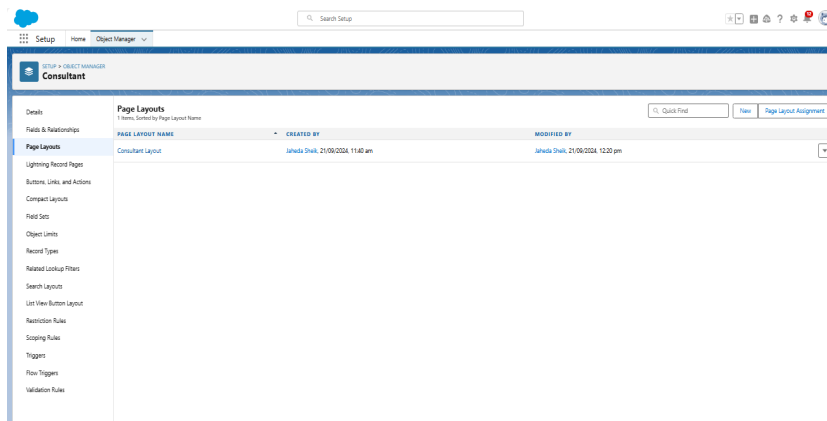
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Coupon	Coupon_c	Text(255)		
Created By	CreatedById	Lookup(User)		
Employee	Employee_c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name_c	Text(255)		
others	Name	Text(80)		✓
Owner	OwnerId	Lookup(User,Group)		✓
Products	Products_c	Picklist (Multi-Select)		

4. Page Layouts

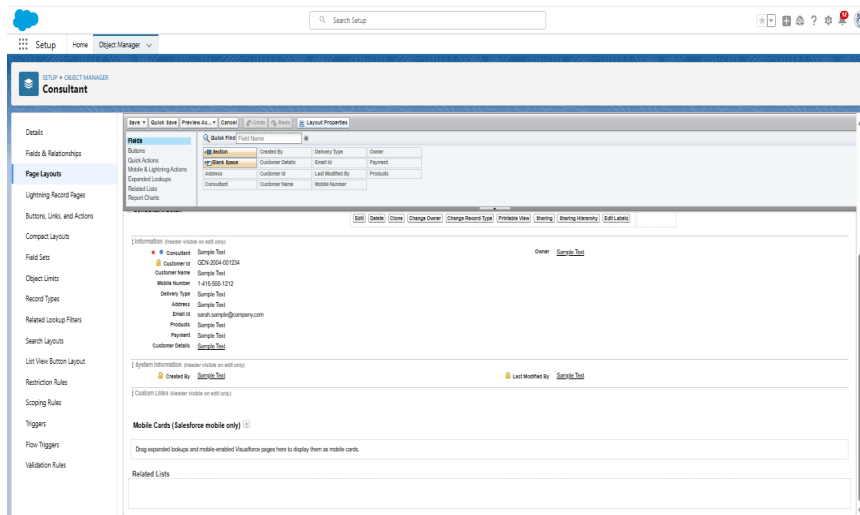
In Salesforce, page layouts define the organization and arrangement of fields, buttons, related lists, and other components on an object's detail and edit pages. They allow you to control the user interface and tailor it to meet the specific needs of your organization.

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



4. Click and drag the **Delivery Type** and **Address** fields below the **Phone** field.
5. Click on **Save**.



5.The Lightning App

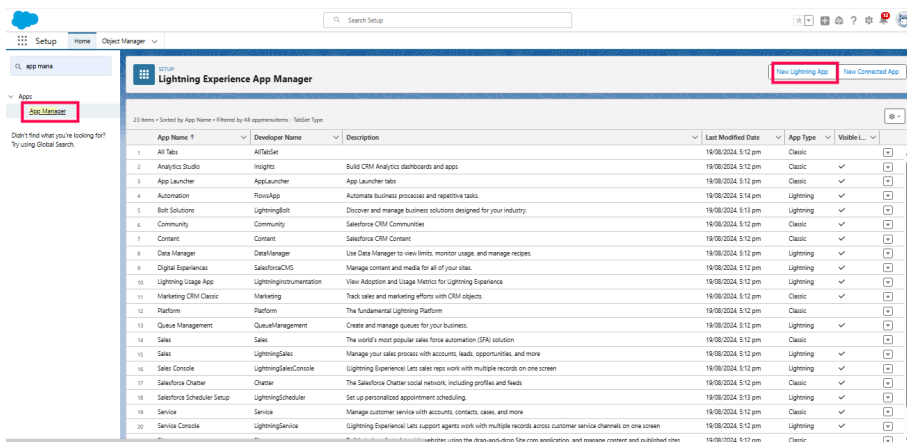
An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

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

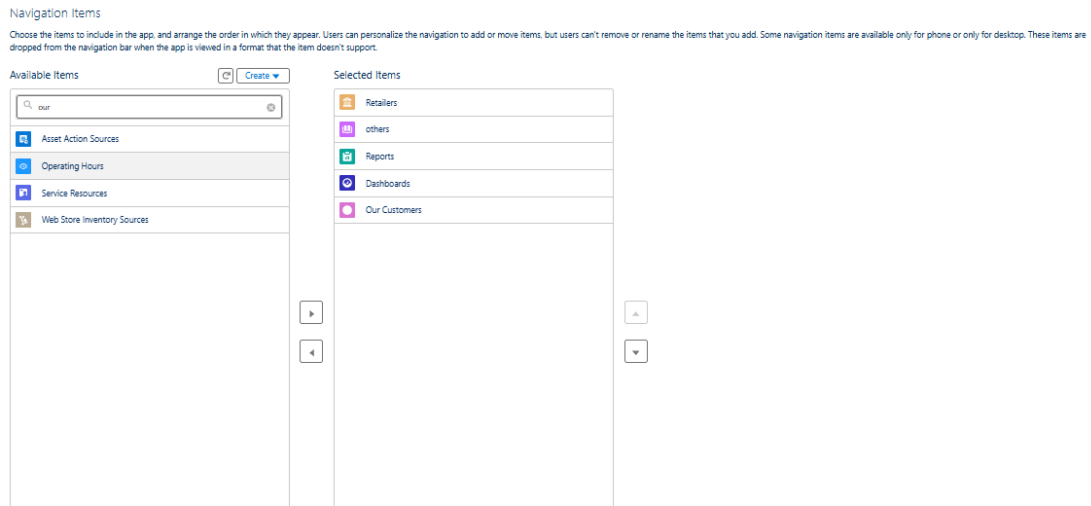
To create a Lightning app page:

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**.



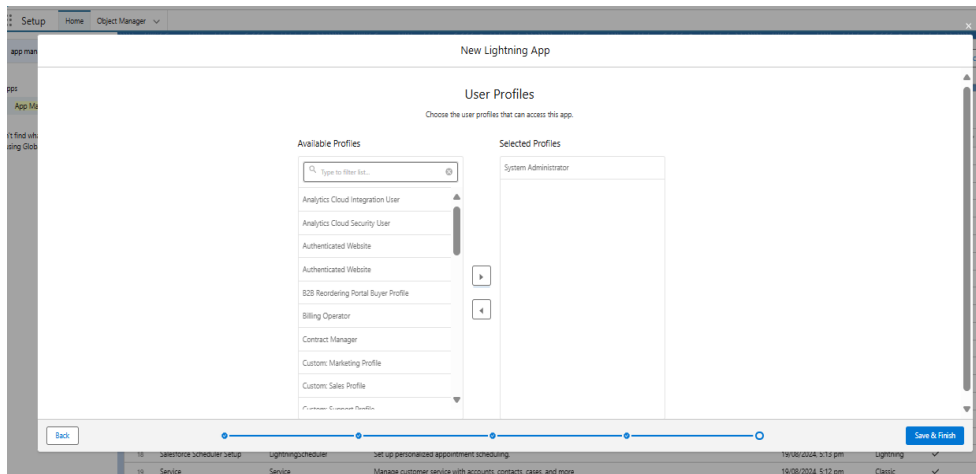
To Add Navigation Items:

1. Select the items (**Our Customers, Consultants, Retailers, Others, Reports, Dashboards**) from the search bar and move them using the arrow button.
2. Click **Next**.



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**.



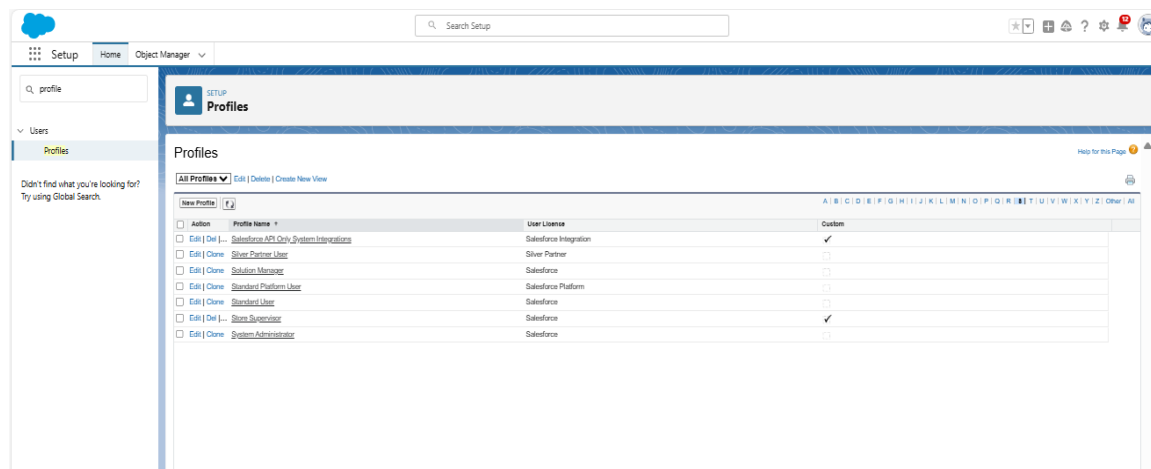
6.Profile

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

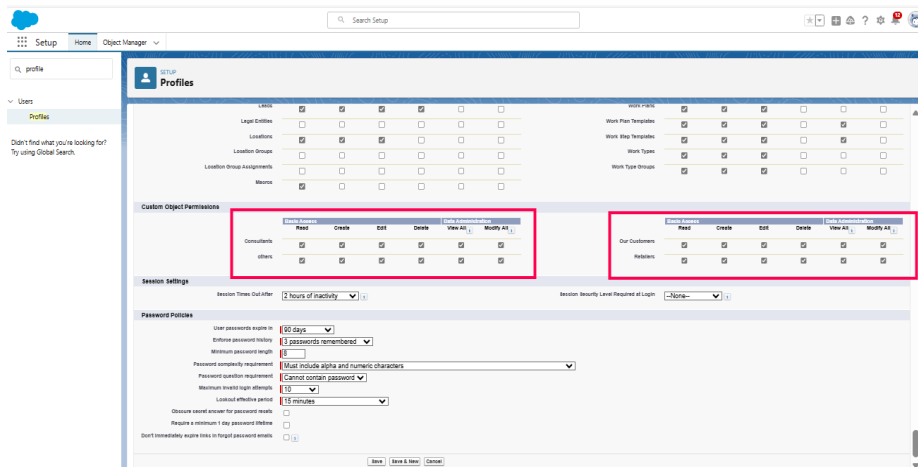
6.1.Creating a Profile

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**.



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



Similarly, Create an Operator Profile:

1. Clone the **Salesforce Platform** user profile.
2. Give access only for **Billing Operator**.

SETUP
Profiles

Profile Edit

Billing Operator

Set the permissions and page layouts for this profile.

Profile Edit

Save

Save & New

Cancel

Name

Billing Operator

User License

Salesforce

Description

Custom Profile

✓

SETUP
Profiles

Manage Users 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

☐

Require a minimum 1 day password lifetime

☐

Don't immediately expire links in forgot password emails

☐

Save

Save & New

Cancel

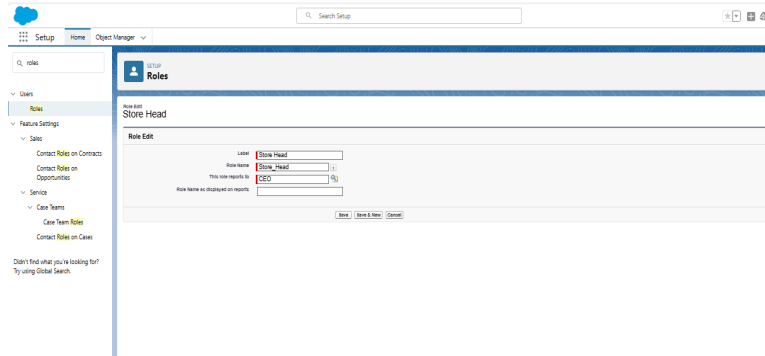
3. Click on **Save**.

7.Setup Roles

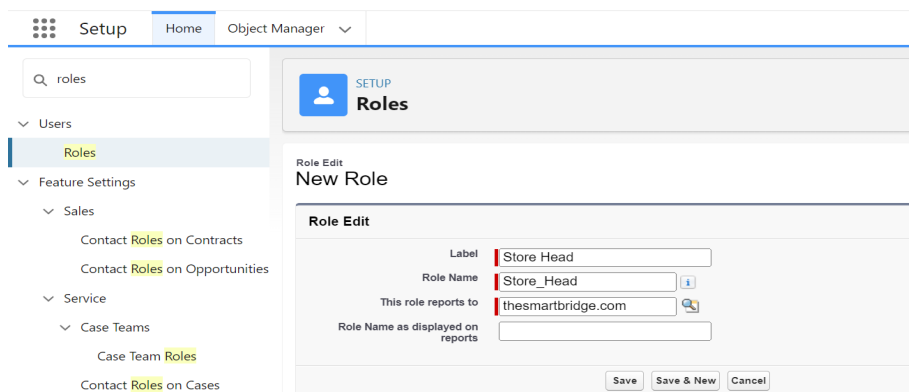
Roles are record-level access controls that define what data a user can see in Salesforce.

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

Service

Case Teams

Contact Roles on Contracts

Contact Roles on Opportunities

Case Team Roles

Contact Roles on Cases

Didn't find what you're looking for?

Try using Global Search.

Setup

Roles

Role Edit

New Role

Role Edit

Label

Billing Operator

Role Name

Billing Operator

This role reports to

Store Head

Role Name as displayed on reports

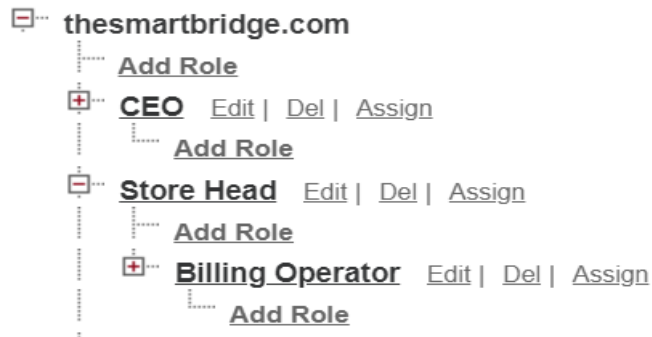
Save

Save & New

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**.

The screenshot shows the Salesforce Setup interface. On the left, the 'Users' link is highlighted under 'User Management Settings'. The main area is titled 'Users' and contains a 'User Edit' form. The form is divided into two columns. The left column contains fields for: First Name (Amar), Last Name (K), Alias (ak), Email (amark2153@gmail.com), Username (amark2153@salesforce.com), Nickname (User167161323313747430), Title (Store Supervisor), Company, Department, and Division. The right column contains dropdown menus for Role (Store Head), User License (Salesforce), and Profile (Store Supervisor), along with checkboxes for Active, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, and WDC User. A 'Data.com User Type' dropdown is set to 'None'. At the bottom right, there is a 'Generate New Password and Notify User Immediately' checkbox which is checked. Buttons for 'Save', 'Save & New', and 'Cancel' are at the top of the form.

This screenshot shows the 'Assign Role' section of the Salesforce Setup 'Users' page. It includes a 'Missing Address' section with fields for Address, City, State, and Zip. Below that is the 'Assign Role' section with a dropdown for 'Assign Role' and a 'Confirm' button. The 'License Settings' section includes dropdowns for 'License' (Salesforce) and 'License Type' (Standard). The 'Approval Settings' section includes checkboxes for 'Require Approval' and 'Require Approval on Login', both of which are checked. At the bottom, there is a note: '(S) Generate new password and notify user immediately'. Buttons for 'Save', 'Save & New', and 'Cancel' are at the bottom of the page.

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**.

The screenshot shows the 'New User' setup page in Salesforce. The 'General Information' tab is selected. The following fields are filled out: First Name (John), Last Name (Teddy), Alias (jteddy), Email (john.teddy@gmail.com), Username (john.teddy@gmail.com), Nickname (John Teddy), Role (Billing Operator), User License (Salesforce Platform), and Profile (Billing Operator). The checkbox 'Generate new password and notify the user immediately' is checked. The 'Marketing User' section is expanded, showing checkboxes for various roles like Marketing User, Office User, etc. The 'Data.com User Type' is set to 'None'.

The screenshot shows the 'New User' setup page in Salesforce, specifically the 'Marketing address' and 'Single sign-on information' sections. The 'Marketing address' section includes fields for First Name, Last Name, Email, and Phone. The 'Single sign-on information' section includes fields for Username, Password, and Confirm Password. The 'Locale settings' section includes fields for Time Zone (GMT+08:00 Asia Standard Time (HKT/HKT)), Language (English (India)), and Currency (English). The 'Appointee settings' section includes fields for Appointee Name and Appointee Email.

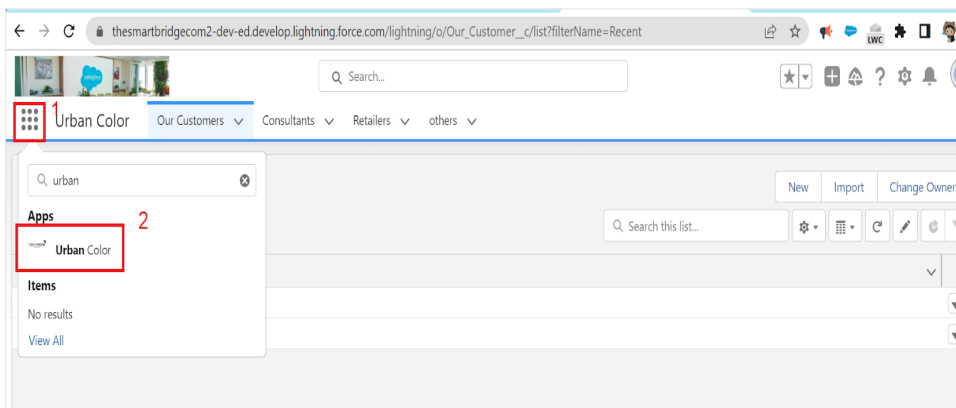
9. User Adoption

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**.

Our Customer
Saida

Related **Details**

Our Customer	Saida	Owner	Jaheda Sheik
Customer id	1		
Customer Name	saida Sheik		
Mobile Number	8956432109		
Email Id			
Address			
Additional Information			

Created By: Jaheda Sheik, 23/09/2024, 3:51 pm
Last Modified By: Jaheda Sheik, 23/09/2024, 3:51 pm

New Our Customer

* = Required Information

Information

Our Customer: kubra

Customer id: kubra

Customer Name: kubra

Mobile Number: 8754954323

Email Id:

Address:

Additional Information:

Owner: Jaheda Sheik

Buttons: Cancel, Save & New, Save

Navigation: Urban Color, Retailers, others, Reports, Dashboards, Our Customers

Search: Q Search...

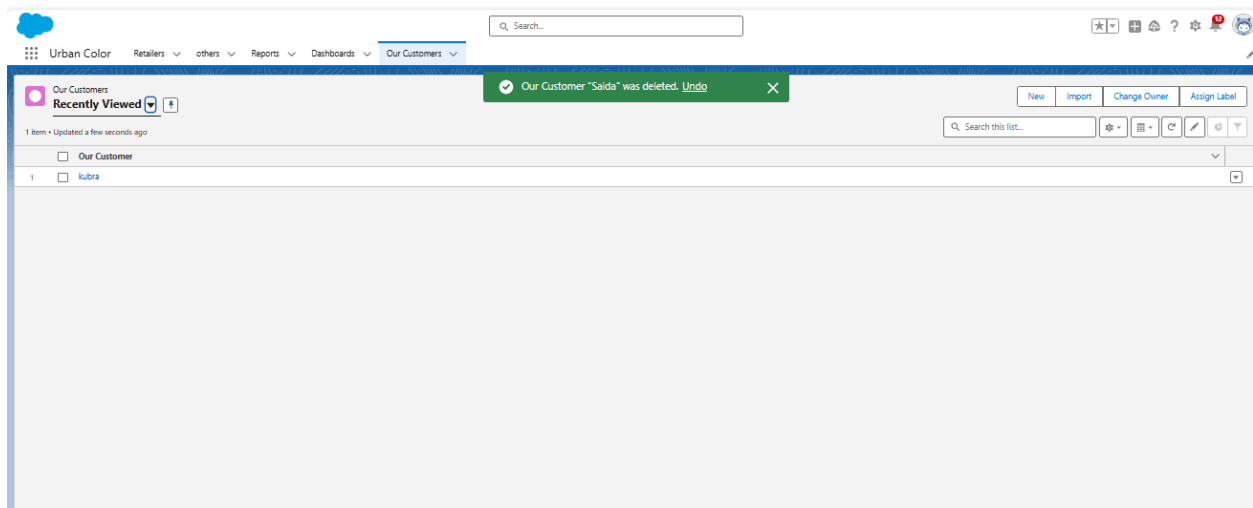
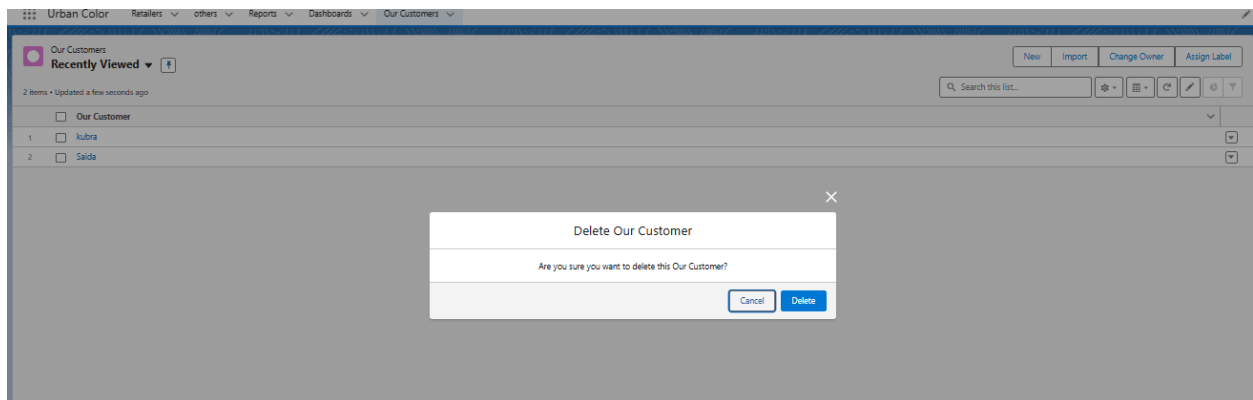
Our Customers: Recently Viewed (1)

2 items • Updated a few seconds ago

	Our Customer	
1	kubra	
2	Saida	

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.

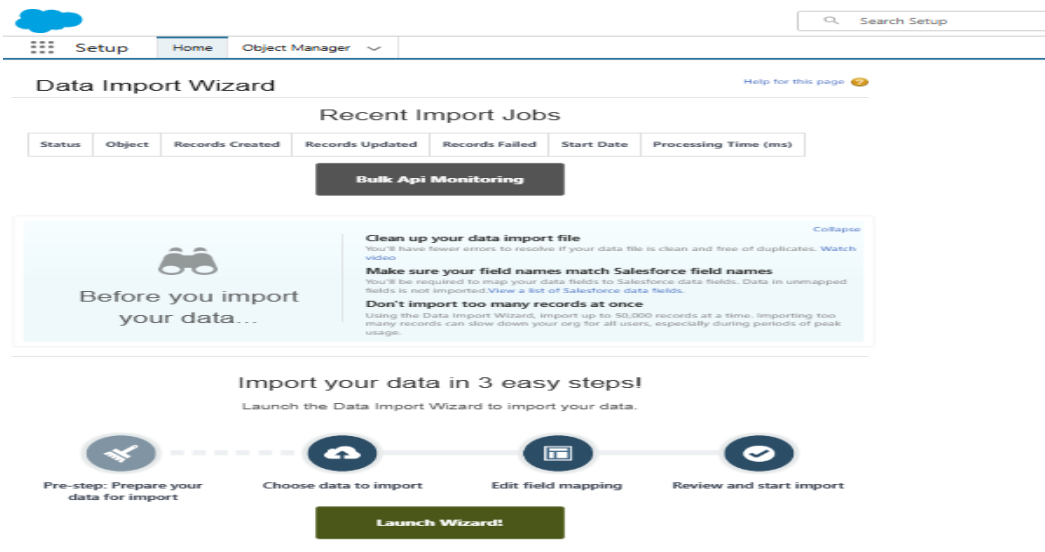


10. Import Data

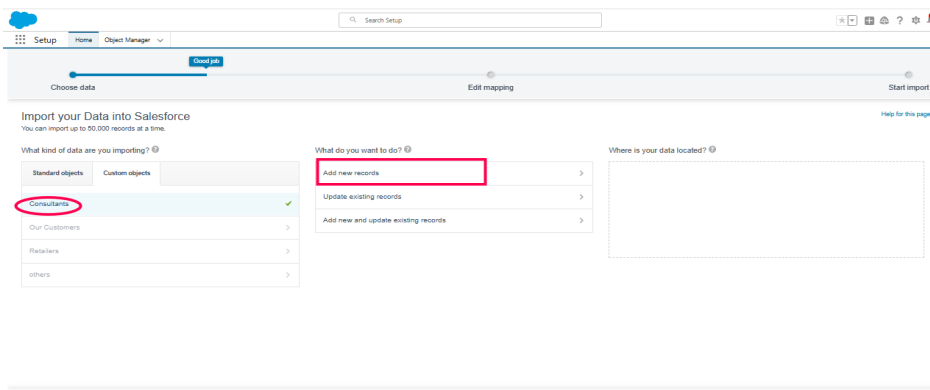
Data Import Wizard—This tool, accessible through the **Setup** menu, allows you to import data into common standard objects such as **Contacts**, **Leads**, **Accounts**, as well as data into custom objects.

To Import Data

1. From **Setup**, click the **Home** tab.
2. In the **Quick Find** box, enter **Data Import** and select **Data Import Wizard**.
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 the file **Consultant_CSV** which was created earlier. Click **Next**.

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

Consultants ✓

Our Customers >

Partners >

Others >

What do you want to do?

Add new records ✓

Match by:
 -None- ✓

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

Which Customer field in your file do you want to match against to set the Customer Details lookup field?
 -None- ✓

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

Update existing records >

Add new and update existing records >

Where is your data located?

Drag CSV file here to upload

CSV

File
 Choose File Consultant_CSV.csv ✓

Character Code
 ISO-8859-1 (General US & Western European ISO/LATIN 1) ✓

Values Separated By
 Comma ✓

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 automatically mapped to existing Salesforce fields, but you can still fine-tune the mappings if you wish. Unmapped fields will not be imported.

Edit	Mapped Salesforce Object	CSV Header
Change	Customer Name	Customer Name
Change	Mobile Number	Mobile Number
Change	Email id	Email id
Change	Delivery Type	Delivery Type
Change	Payment	Payment
Change	Address	Address

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 ✓

Consultant_CSV.csv ✓

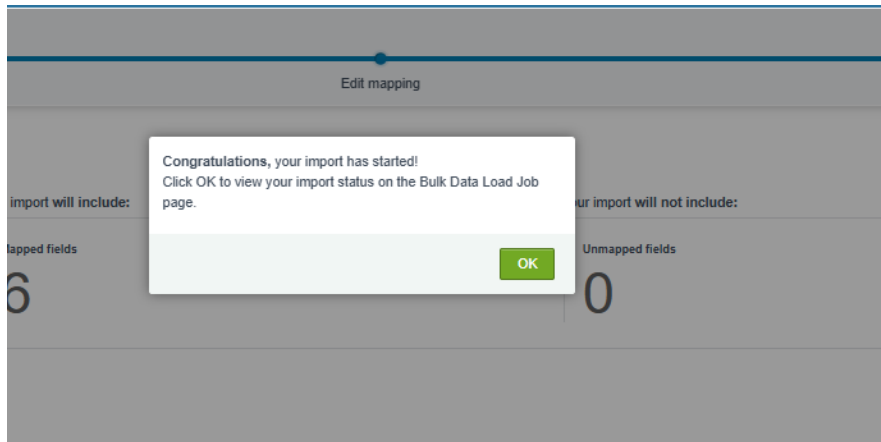
Your import will include:

Mapped fields
 6

Your import will not include:

Unmapped fields
 0

9. Click **OK** on the popup.



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

SETUP

Bulk Data Load Jobs

Bulk Data Load Job

750NS000002Hqp5

View the details of a bulk data load job.

»

Back to List: Bulk Data Load Jobs

Bulk Data Load Job Detail

Refresh

Job ID	750NS000002Hqp5	Job Type	Bulk V1	Status	Closed
Submitted By	ajheda@heda	Operation	Insert	Total Processing Time (min)	0
Start Time	23/06/2024, 4:21 pm IST	Queued Batches	0	API Queue Processing Time (min)	0
End Time	23/06/2024, 4:21 pm IST	In Progress Batches	0	API Processing Time (min)	0
Time to Complete (min:sec)	00:00	Completed Batches	0		
Queue	Consultant	Failed Batches	0		
External ID Field		Progress			
Content Type	CSV	Records Processed			
Concurrency Mode	Parallel	Records Failed			
API Version	61.0	Records	0		

Refresh

»

Back to List: Bulk Data Load Jobs

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.

Report Types:

A **Report Type** determines which set of records will be available in a report. Each report is based on a particular report type, selected first when creating a report. Every report type has a primary object and one or more related objects, all of which must be linked together directly or indirectly.

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

There are 2 types of report types:

1. Standard Report Types:

- 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:

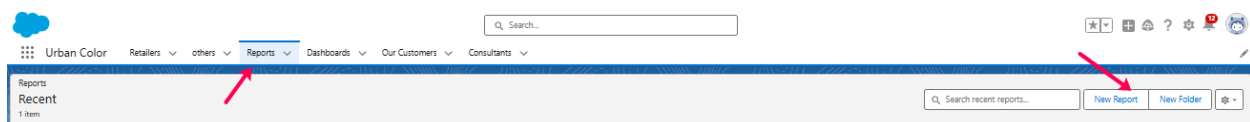
- Users can view and modify the reports and move them to/from any other folders they have access to as Editor or Manager.

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

1. Click **App Launcher**.
2. Select **Urban Color App**.
3. Click the **Reports** tab.
4. Click **New Report**.



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.**
7. Click the drop-down option on the **Payment** column and select **Bucket This Column.**
8. Name the bucket **Payment Type.**

Edit Bucket Column

* Field: ×

* Bucket Name:

All Values (4):

- ☒ netbanking (3)
- ☐ cash (1)
- Unbucketed Values (0)

☐ Bucket remaining values as Other

VALUE	BUCKET
<input type="checkbox"/> 1)Debit Card	<input checked="" type="checkbox"/> netbanking
<input type="checkbox"/> 2)Credit Card	<input checked="" type="checkbox"/> netbanking
<input type="checkbox"/> 3)UPI	<input checked="" type="checkbox"/> netbanking

9. Click **Add Bucket** and name it **NetBanking.**
10. Click **Add Bucket** and name it **Cash.**
11. Click on **All Values**, select **Credit Card, Debit Card, UPI**, and move them to **NetBanking.**

Edit Bucket Column

* Field: ×

* Bucket Name:

All Values (4):

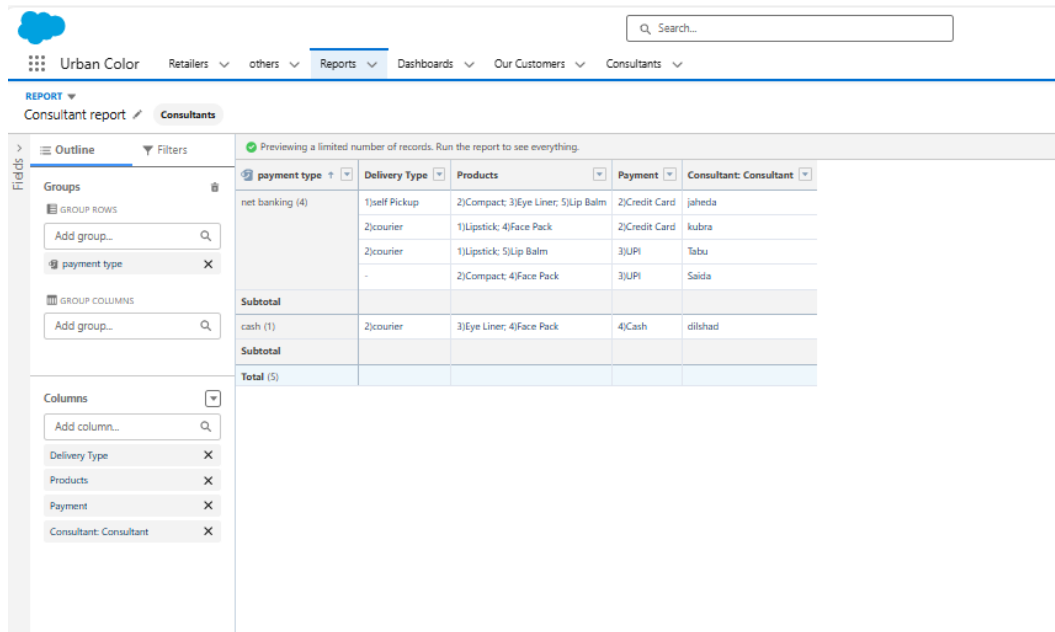
- ☒ netbanking (3)
- ☒ cash (1)
- Unbucketed Values (0)

☐ Bucket remaining values as Other

VALUE	BUCKET
<input type="checkbox"/> 4)Cash	<input checked="" type="checkbox"/> cash

12. Click on **All Values** again, select **Cash**, and move it to **Cash.**
13. Click **Apply.**

14. In **Group Rows**, add the **Payment Type Bucket** field.
15. Click **Refresh**.
16. Click **Save and Run**.
17. Give the report a name, e.g., **Consultant Report**.
18. Click **Save**.



Urban Color Retailers others **Reports** Dashboards Our Customers Consultants

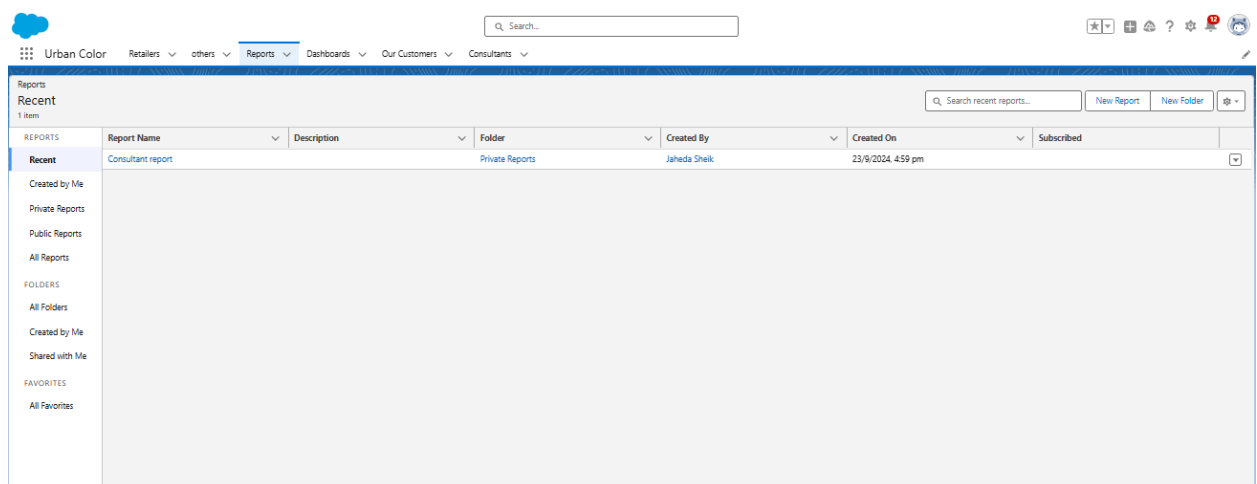
REPORT Consultant report Consultants

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

payment type	Delivery Type	Products	Payment	Consultant: Consultant
net banking (4)	1)self Pickup	2)Compact; 3)Eye Liner; 5)lip Balm	2)Credit Card	jaheda
	2)courier	1)lipstick; 4)Face Pack	2)Credit Card	kubra
	2)courier	1)lipstick; 5)lip Balm	3)UPI	Tabu
	-	2)Compact; 4)Face Pack	3)UPI	Saida
Subtotal				
cash (1)	2)courier	3)Eye Liner; 4)Face Pack	4)Cash	dilshad
Subtotal				
Total (5)				

11.2.View Report

1. Click on the **App Launcher** on the left side of the screen.
2. Search for **Urban Color App** and click on it.
3. Click the **Reports** tab.
4. Click on the **Urban Color Report** to view the records.



Urban Color Retailers others **Reports** Dashboards Our Customers Consultants

Search recent reports... New Report New Folder

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Consultant report		Private Reports	Jaheda Sheik	23/9/2024, 4:59 pm	

Created by Me
Private Reports
Public Reports
All Reports

FOLDERS
All Folders
Created by Me
Shared with Me

FAVORITES
All Favorites

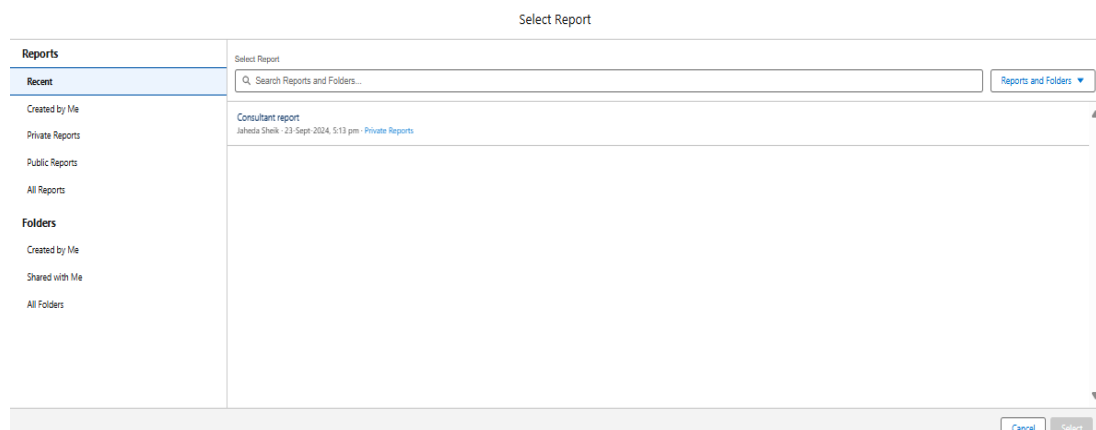
12.Dashboards

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.

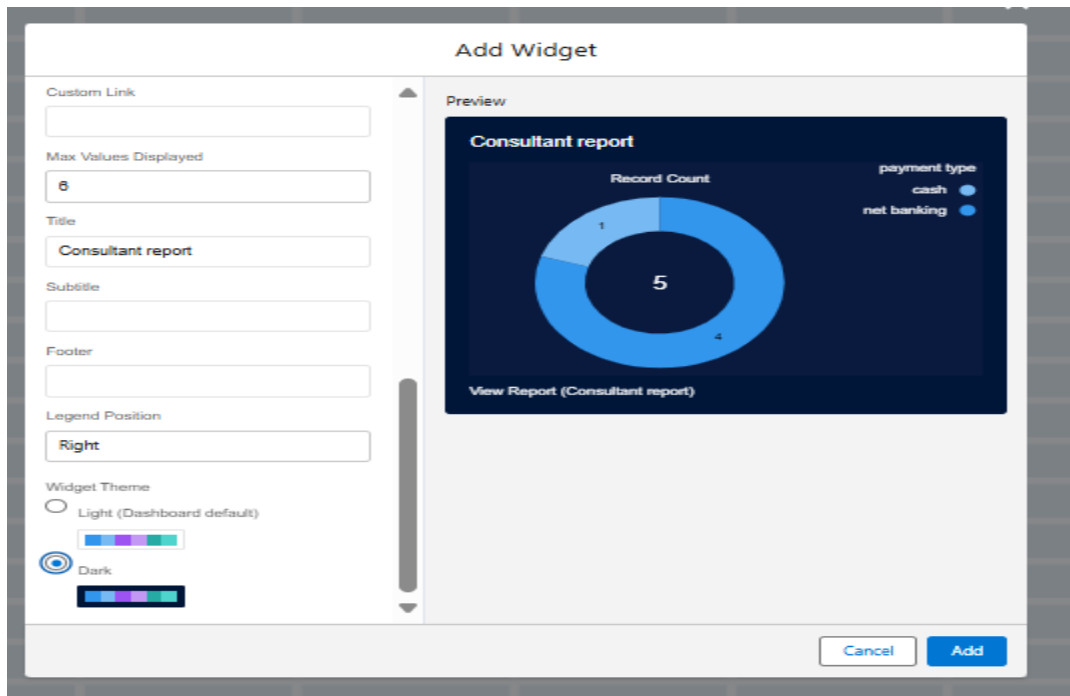
12.1.Create Dashboard

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

- 1.
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."
5. **Add Components to the Dashboard:**
 - Click on "+ Component" to add a new component.
 - Select the "Consultants Report" you created earlier.

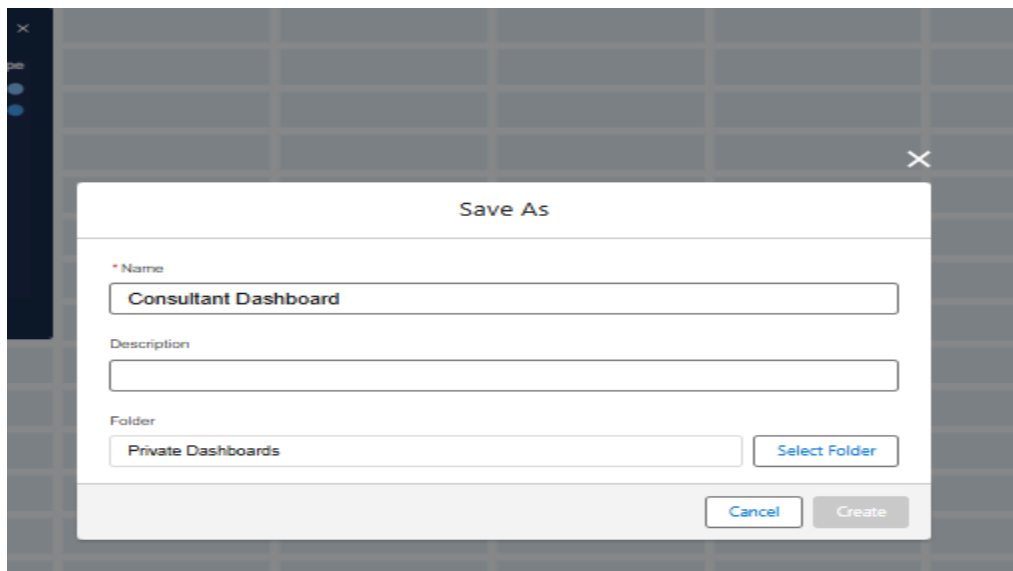


6. **Choose Data Visualization:**
 - Pick a visualization type (e.g., chart, table) that best suits your data and needs.
 - Click "Add."



7. Save Your Dashboard:

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



12.2.View Dashboard

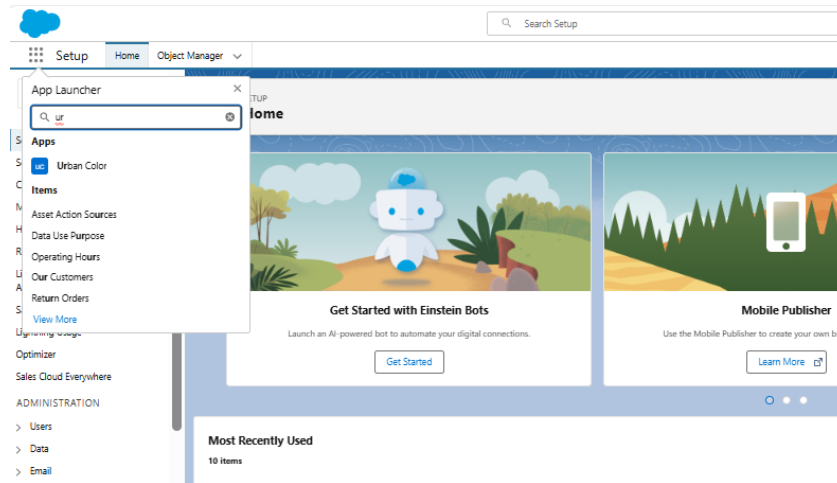
To view the dashboard, follow these steps:

1. Open the App Launcher:

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

2. Search for the Dashboard:

- Type "Urban color" into the search bar.
- Click on the "Urban color" option that appears.



3. Navigate to the Dashboard Tab:

- Once in the Urban color view, click on the "Dashboard" tab.

