

Cosmetics Store Management

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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

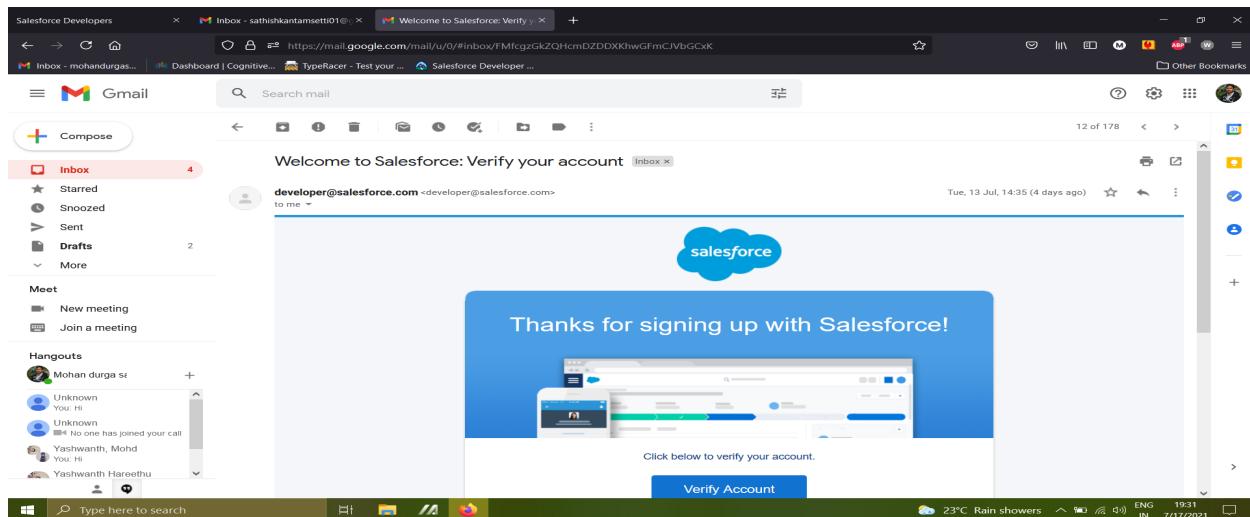
Step 1: Sign Up for a Developer Org

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.

The image shows two side-by-side screenshots. The left screenshot is a dark-themed promotional page for the Lightning Platform, featuring a large monitor displaying a complex dashboard with various charts and data. Text on the page includes 'Explore Lightning Platform, the fastest way to create enterprise cloud apps' and several bullet points about the platform's features like drag-and-drop tools and enterprise-grade security. The right screenshot is a light-themed sign-up form for a 'Developer Edition' on the Salesforce lightning platform. It has a header with the Salesforce logo and the text 'lightning platform'. Below the header, it says 'Get your very own Developer Edition' and 'A full-featured copy of Lightning Platform, for FREE.' The form contains six input fields: 'Name' (split into 'First' and 'Last'), 'Email' (with placeholder 'Your email address'), 'Role' (with placeholder 'Your job role'), 'Company' (with placeholder 'Company Name'), 'Country' (with placeholder 'United States'), and 'Postal Code'. At the bottom of the form, there is a small checkbox labeled 'I'm not a robot'.

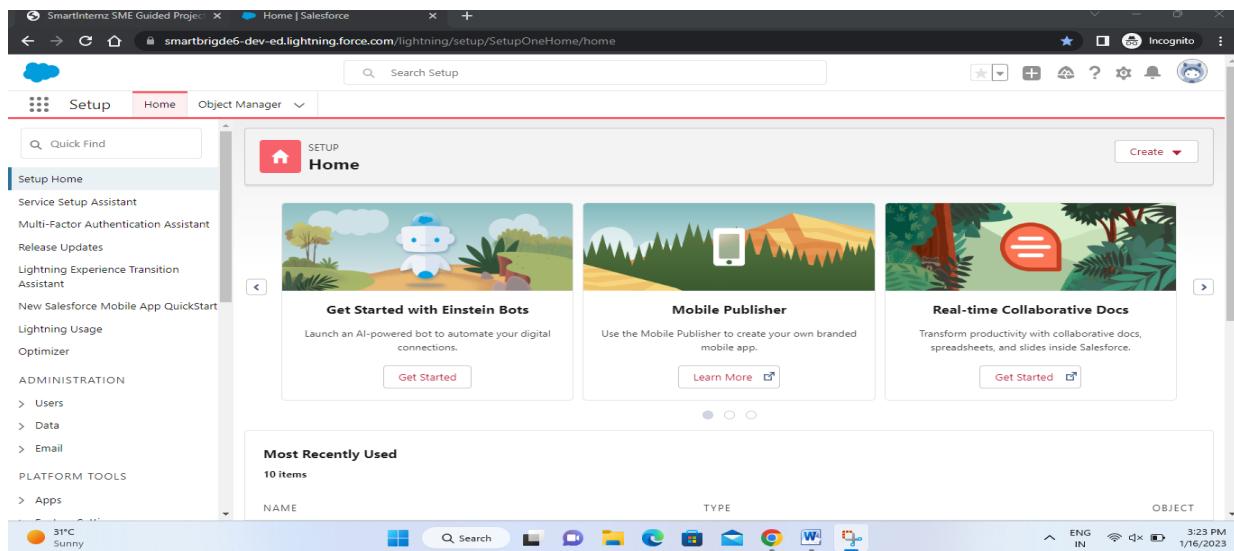
Step 2: Account Activation

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.

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 **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.

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.

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 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	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

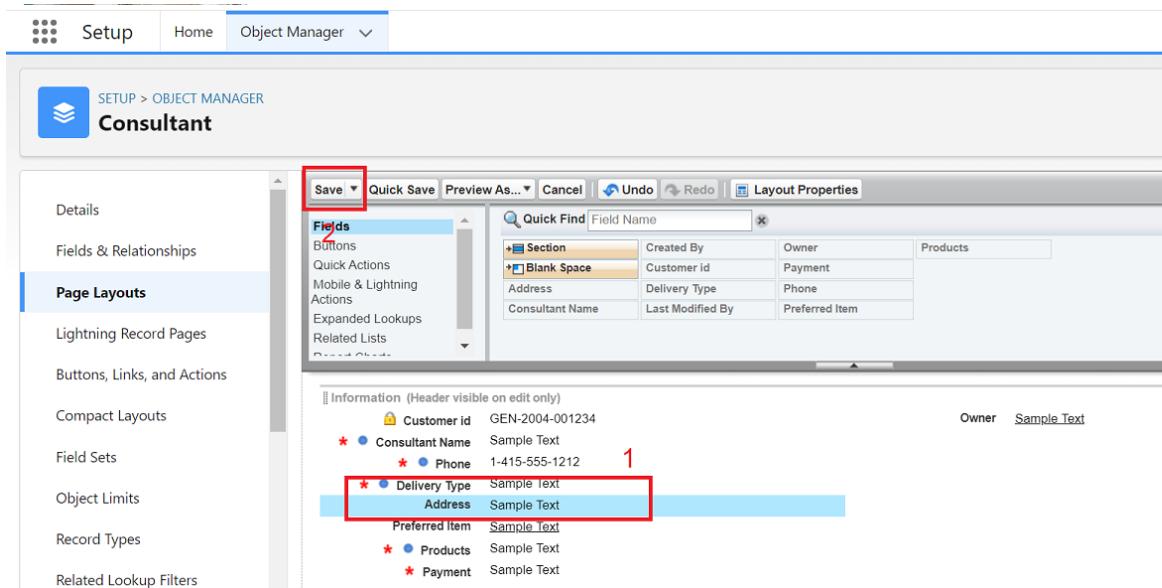
The screenshot shows the Salesforce Object Manager for the 'Consultant' object. The left sidebar has a 'Page Layouts' section highlighted with a red box and the number '1'. In the main area, the 'Page Layouts' table is displayed with one item: 'Consultant Layout'. The table has columns for 'PAGE LAYOUT NAME', 'CREATED BY', and 'MODIFIED BY'. The 'Consultant Layout' row is highlighted with a red box and the number '2'. The URL at the bottom is 'thesmartbridgecom2-dev-ed.develop.lightning.force.com/lightning/.../view'.

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Consultant Layout	Hazari Ajay Kumar, 4/1/2023, 7:25 AM	Hazari Ajay Kumar, 6/18/2023, 10:30 PM

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

The screenshot shows the 'Page Layouts' editor for the 'Consultant' object. The left sidebar has a 'Page Layouts' section highlighted with a red box. The main area shows the page layout configuration. The 'Fields' section on the left lists fields like Buttons, Quick Actions, etc. The 'Fields' grid on the right contains fields: Customer id, Created By, Owner, Products, Blank Space, Address, Delivery Type, Phone, Consultant Name, Last Modified By, Preferred Item. A red arrow points to the 'Delivery Type' field. Another red arrow points to the 'Address' field. The URL at the bottom is 'thesmartbridgecom2-dev-ed.develop.lightning.force.com/lightning/.../view'.

5. Click on **Save**.



5.The Lightning App

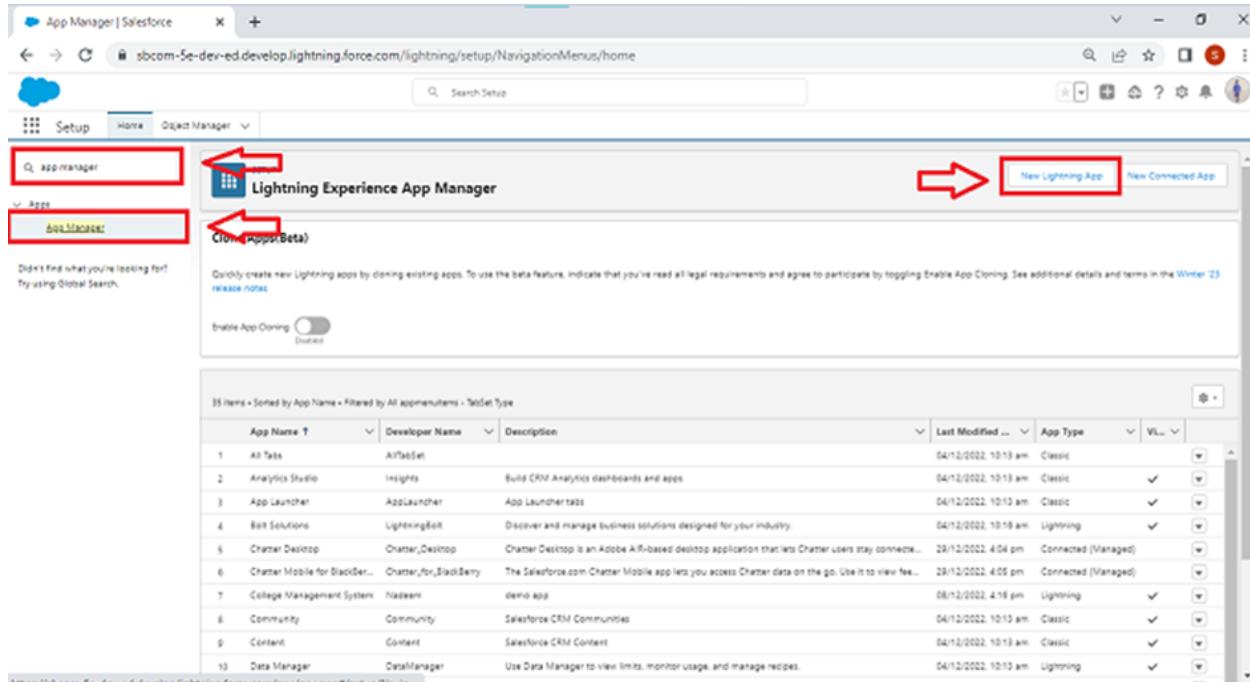
An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

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

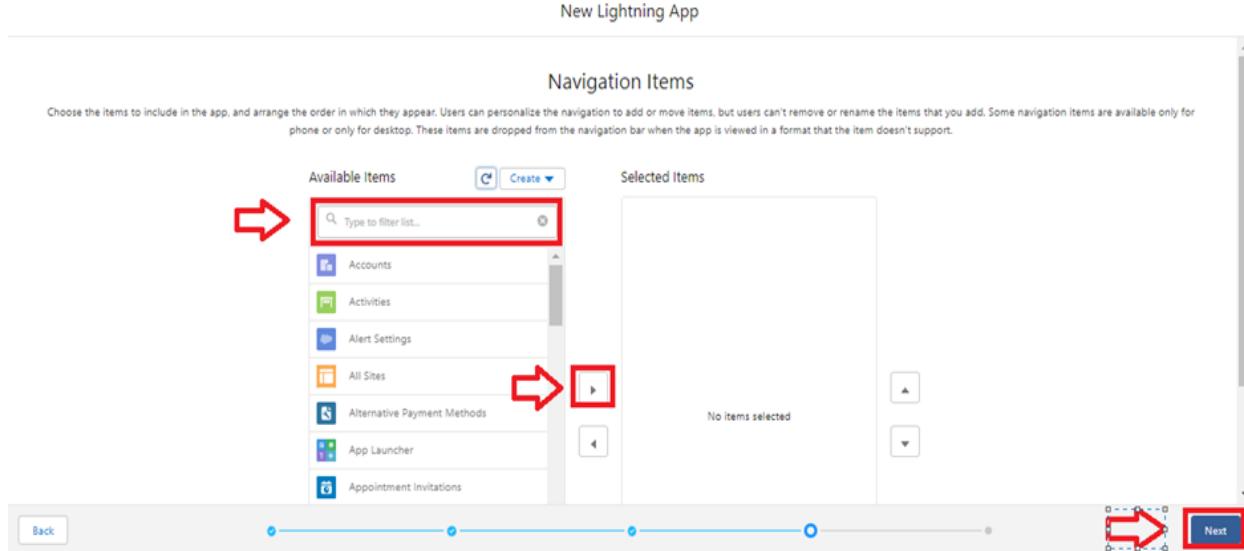
To create a Lightning app page:

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**.



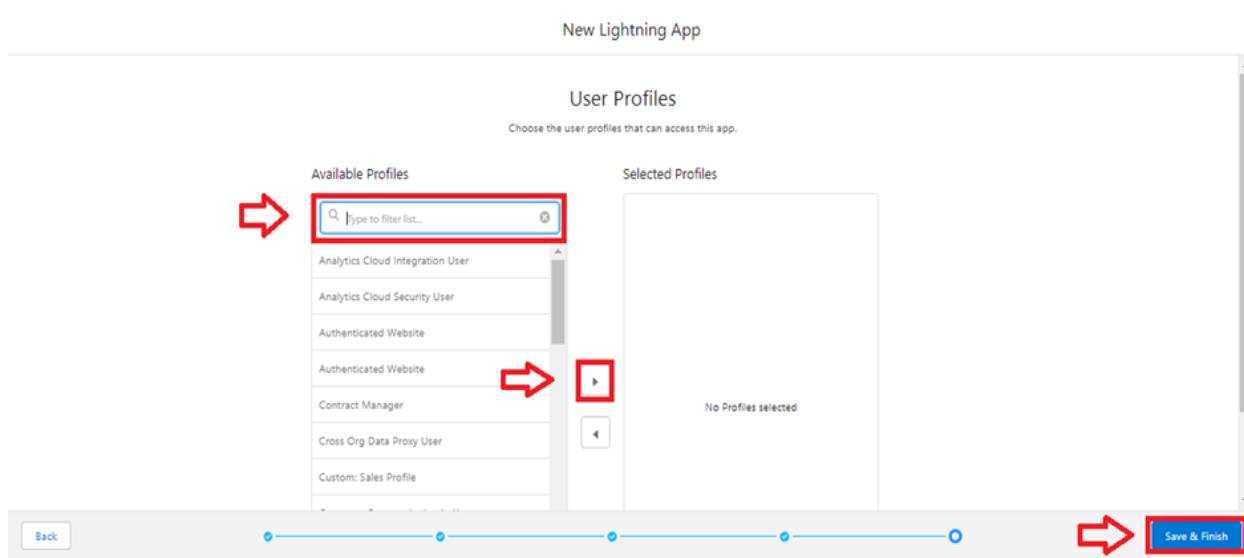
To Add Navigation Items:

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**.

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. A search bar at the top left contains the text 'prof'. The main area is titled 'SETUP Profiles' and shows a 'Clone Profile' section. It prompts the user to 'Enter the name of the new profile.' Below this, a message says 'You must select an existing profile to clone from.' A table lists an 'Existing Profile' as 'Standard User' and 'User License' as 'Salesforce'. The 'Profile Name' field is filled with 'Store Supervisor'. At the bottom right of the form are 'Save' and 'Cancel' buttons.

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.

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. A search bar at the top left contains the text 'prof'. The main area is titled 'SETUP Profiles' and shows a 'Profile' section for 'Store Supervisor'. It states that users with this profile have certain permissions and page layouts listed below. It also mentions Record Types and their settings. Below this, a 'Profile Detail' table shows the profile's name as 'Store Supervisor', user license as 'Salesforce', and a checked 'Custom Profile' checkbox. There are 'Edit', 'Clone', 'Delete', and 'View Users' buttons above the table.

The screenshot shows the Salesforce Setup interface under the 'Profiles' section. On the left, there's a search bar with 'prof' typed in and a 'Users' dropdown menu. The main area is titled 'SETUP Profiles'. It lists various profiles with checkboxes for selecting permissions. Some profiles have their names in blue, indicating they are standard profiles. The profiles listed include:

- (standard__LightningSort)
- Community (standard__Community)
- Content (standard__Content)
- Data Manager (standard__DataManager)
- Digital Experiences (standard__SalesforceCMS)
- Lightning Usage App (standard__LightningInstrumentation)
- LWC LEARNINGS (LWC__LEARNINGS)
- Marketing (standard__Marketing)
- Queue Management (standard__QueueManagement)
- Rental Management (Rental__Management)
- (standard__Scheduler)
- Salesforce Scheduler Setup (standard__LightningScheduler)
- Sample Console (standard__ServiceConsole)
- Service (standard__Service)
- Service Console (standard__LightningService)
- Site.com (standard__Sites)
- Subscription Management (standard__RevenueCloudConsole)
- Urban Color (Urban__Color)
- Vehicle Management (Vehicle__Management)
- WDC (standard__Work)

Below the list, there are sections for 'Service Provider Access' and 'Tab Settings'. A note at the bottom says 'Overwrite 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**.

The screenshot shows the Salesforce Setup interface under the 'Profile' section for the 'Store Supervisor' profile. On the left, there's a search bar with 'prof' typed in and a 'Users' dropdown menu. The main area is titled 'SETUP Profiles' and shows the 'Profile' section for 'Store Supervisor'. The profile details are as follows:

- Name:** Store Supervisor
- User License:** Salesforce
- Description:** (empty)
- Custom Profile:**

Below the profile details, there's a list of permissions and page layouts. At the bottom, there are buttons for 'Edit', 'Clone', 'Delete', and 'View Users'.

Permissions listed:

- Login IP Ranges [0] | Enabled Apex Class Access [703] | Enabled Visualforce Page Access [1] | Enabled External Data Source Access [0]
- Enabled External Credential Principal Access [0] | Enabled Custom Metadata Type Access [0] | Enabled Custom Setting Definitions Access [0]
- Enabled Service Presence Status Access [0] | Enabled Custom Permissions [0]

8. Scroll down to the **Custom Object Permissions** and give all access to the **Consultants, Others, Our Customers, Retailers** objects.
9. Click on **Save**.

The screenshot shows the 'Profiles' page under 'SETUP'. It displays a grid of permissions for various objects. The columns represent objects and the rows represent permissions (e.g., Create, Read, Update, Delete). Checkmarks indicate granted permissions. For example, 'Consultants' has all permissions granted, while 'Others' has most granted except for Delete.

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

Similarly, Create an Operator Profile:

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

The screenshot shows the 'Profile Edit' page for a 'Billing Operator' profile. The profile is based on the 'Salesforce' license and is a 'Custom Profile'. The 'Name' field is set to 'Billing Operator'. There is a large text area for 'Description' which is currently empty.

Profile Edit		Save	Save & New	Cancel
Name	Billing Operator			
User License	Salesforce			
Description				

The screenshot shows the 'Profiles' setup page under the 'SETUP' tab. The 'Allow OAuth for employees' checkbox is checked. The 'Password Policies' section is expanded, displaying various configuration options:

- 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: Unchecked
- Require a minimum 1 day password lifetime: Unchecked
- Don't immediately expire links in forgot password emails: Checked

At the bottom are three buttons: Save, Save & New, and 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.

The image consists of two vertically stacked screenshots of the Salesforce Setup interface, both titled "Role Edit" and "New Role".

Screenshot 1 (Top): This screenshot shows the creation of a role for the "Store Head". The "Label" field contains "Store Head", the "Role Name" field contains "Store_Head", and the "This role reports to" field contains "thesmartbridge.com". The "Role Name as displayed on reports" field is empty. At the bottom right are three buttons: "Save", "Save & New", and "Cancel".

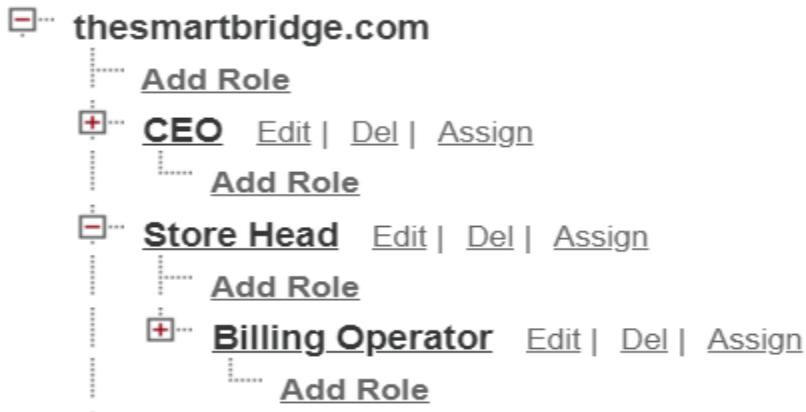
Screenshot 2 (Bottom): This screenshot shows the creation of a role for the "Billing Operator". The "Label" field contains "Billing Operator", the "Role Name" field contains "Billing_Operator", and the "This role reports to" field contains "Store Head". The "Role Name as displayed on reports" field is empty. At the bottom right are three buttons: "Save", "Save & New", and "Cancel".

Left Panel (Common to both screenshots): The left panel shows the navigation menu under "Users". The "Roles" item is selected. Other items include "Feature Settings" (with "Sales" and "Service" sub-items), "Case Teams" (with "Case Team Roles" and "Contact Roles on Cases"), and "Contact Roles" (with "Contact Roles on Contracts" and "Contact Roles on Opportunities").

Header: Both screenshots have a header with "Setup", "Home", and "Object Manager". A search bar at the top left contains the text "roles".

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**.

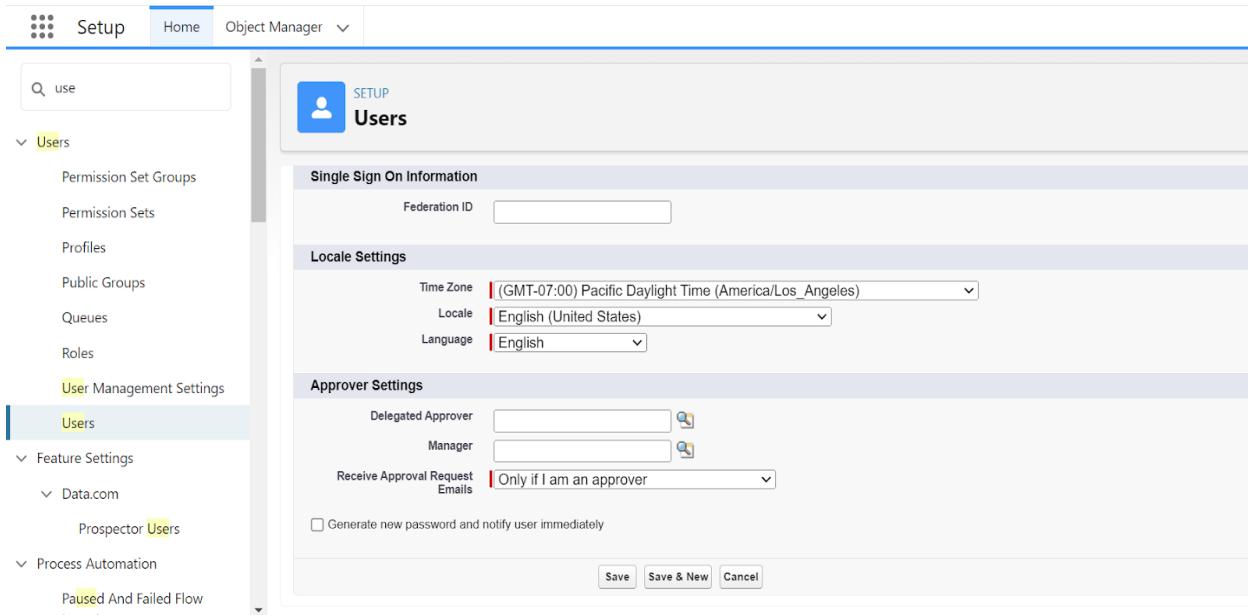
Second User Creation:

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**.

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected in the sidebar. The main area displays the 'User Edit' screen for a new user named 'John'. The 'General Information' section includes fields for First Name (John), Last Name (Teddy), Alias (tedd), Email (teddyjohn@gmail.com), Username (johnteddy@sforce.com), Nickname (User167160299867441831), Title (Vehicle Manager), Company, Department, and Division. On the right side, under 'Role', 'Billing Operator' is selected. Under 'User License', 'Salesforce Platform' is selected. Under 'Profile', 'Billing Operator' is selected. The 'Active' checkbox is checked. There are also sections for Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, and WDC User, all of which are unchecked. At the bottom, there are settings for Data.com User Type (None), Data.com Monthly Addition Limit (300), Accessibility Mode (Classic Only), High-Contrast Palette on Charts, Load Lightning Pages While Scrolling (checked), Debug Mode, and Make Setup My Default Landing Page.



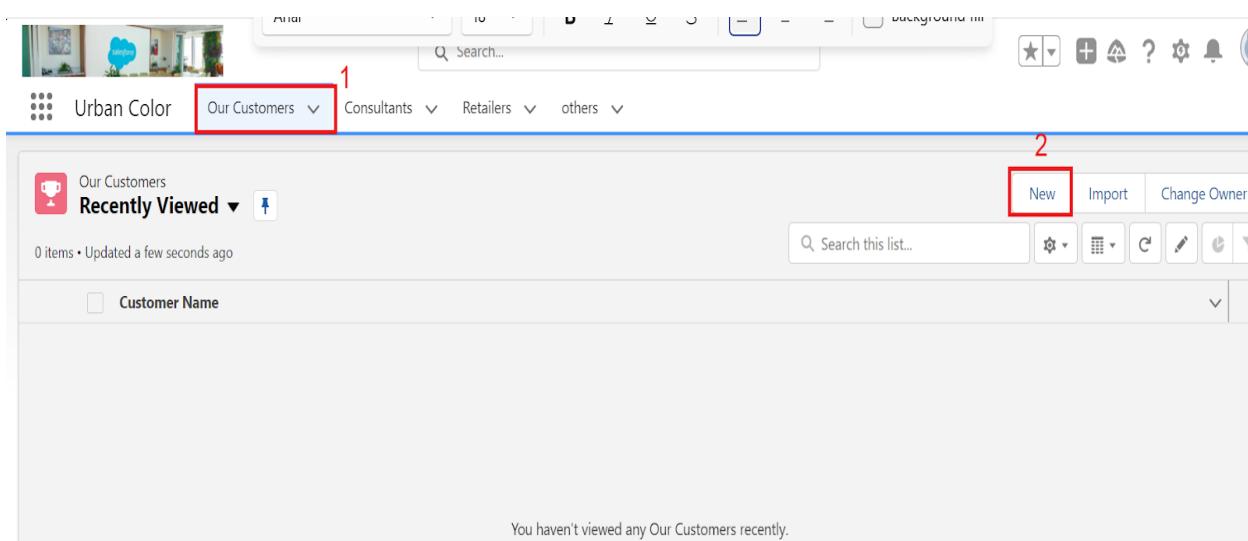
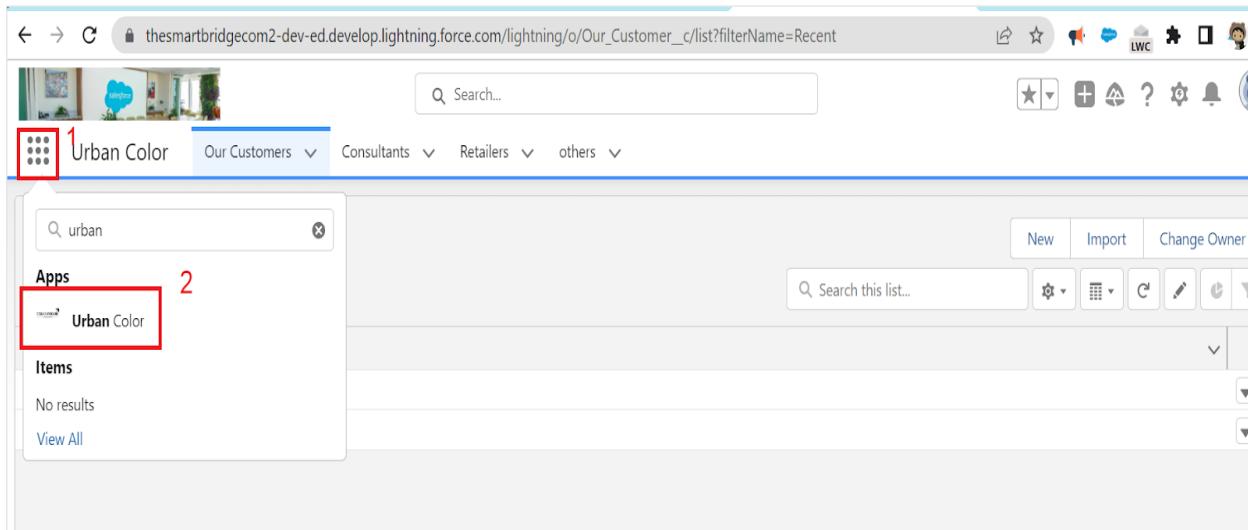
9. User Adoption

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

Address

Cancel Save & New **Save** 2

Urban Color **Our Customers** 1

Recently Viewed 2

Our Customers Consultants Retailers others

New Import Change Owner

Search this list...

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

 Our Customer
Suresh

Related	Details
Customer Name	Owner
Suresh	 Hazari Ajay Kumar
Customer id	
5	
Phone	
97583873728	
Email id	
suresh@gmail.com	
Address	
Hyderabad	
Additional Information	
Customer	

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.

1

2

3

Delete Our Customer

Are you sure you want to delete this Our Customer?

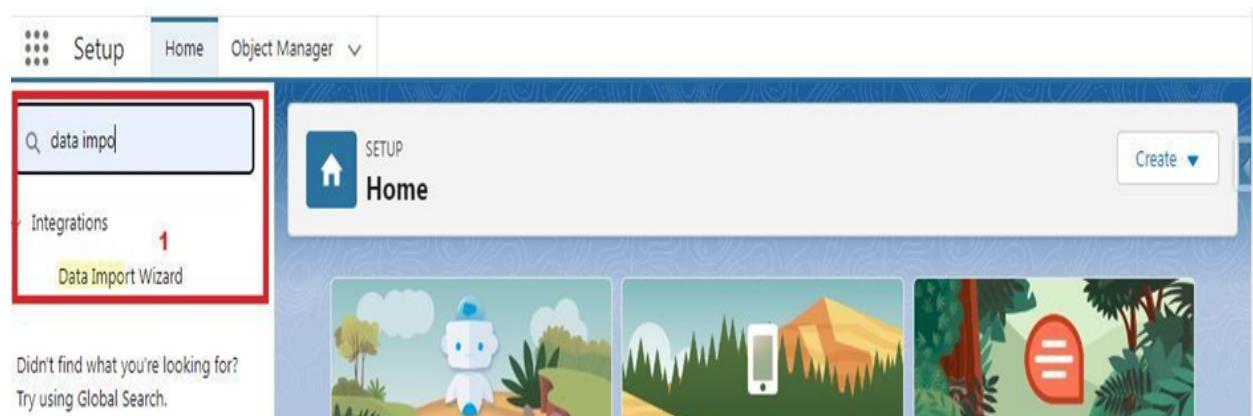
Cancel Delete

10. Import Data

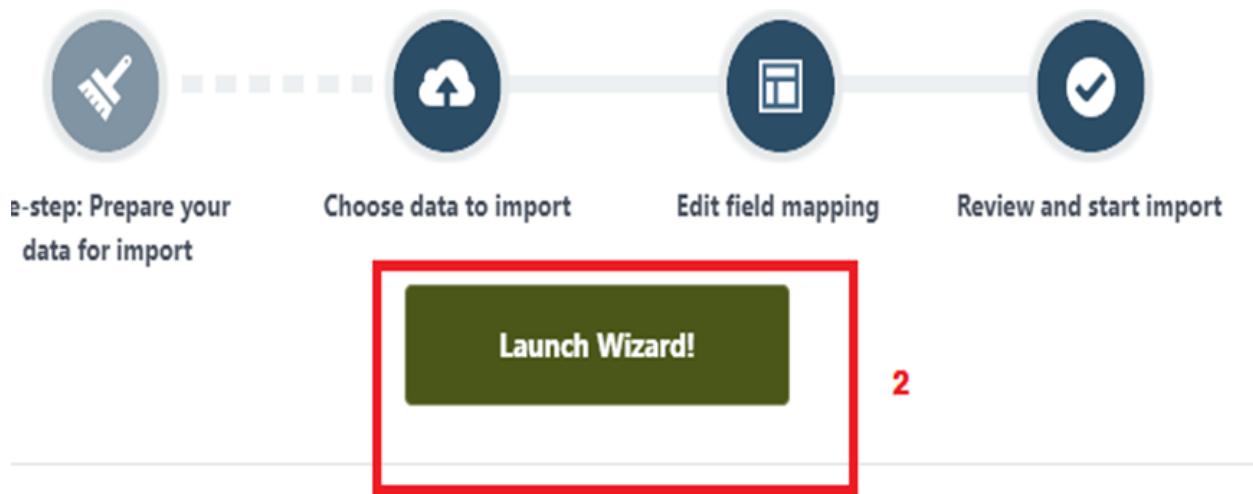
Data Import Wizard—This tool, accessible through the **Setup** menu, allows you to import data into common standard objects such as **Contacts**, **Leads**, **Accounts**, as well as data into custom objects.

To Import Data

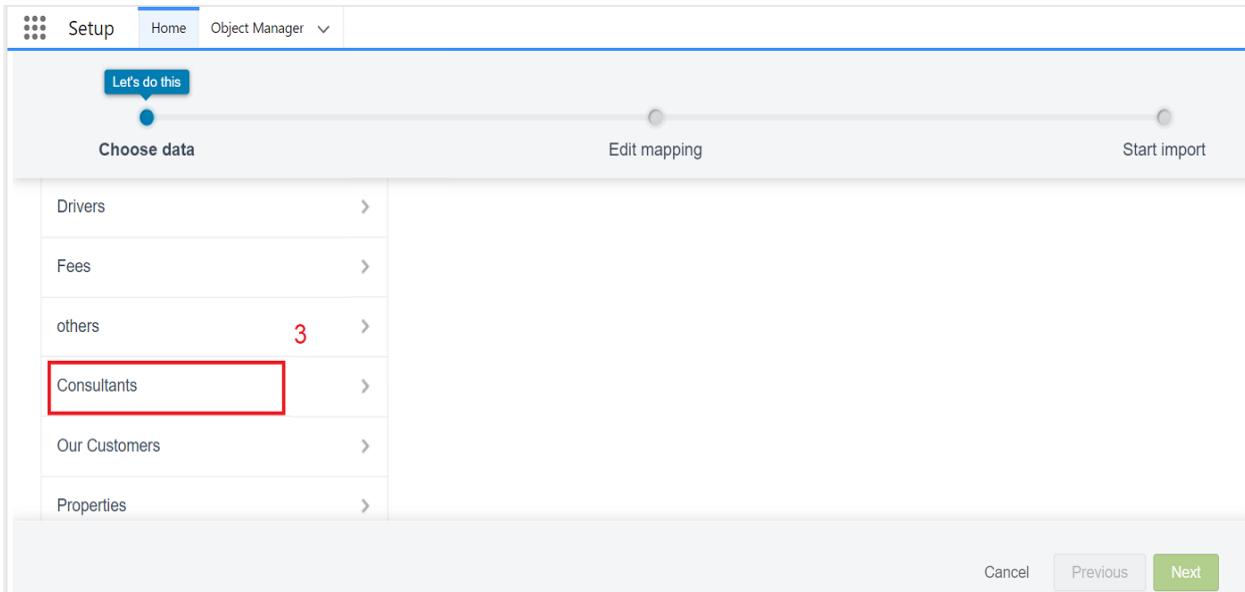
1. From **Setup**, click the **Home** tab.
2. In the **Quick Find** box, enter **Data Import** and select **Data Import Wizard**.



3. Click **Launch Wizard!**



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



5. Select **Add New Records**.

Import your Data into Salesforce

You can import up to 50,000 records at a time.

This section of the import wizard allows you to choose the action for your data. It has three tabs: 'Standard objects' (selected), 'Custom objects', and 'File'. Under 'Standard objects', 'Attendees' and 'Buyers' are listed. On the right, under 'What do you want to do?', there are three options: 'Add new records' (highlighted with a red box and a red '4' marker), 'Update existing records', and 'Add new and update existing records'.

6. Click **CSV** and choose the file **Consultant_CSV** which was created earlier. Click **Next**.

Choose data

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 Help for this page

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**.

Choose data

Edit mapping

Great job

Start import

Help for this page ⓘ

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:**

Mapped fields **7**

Your import **will not include:**

Unmapped fields **0**

Cancel Previous **Start Import**

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

Congratulations, your import has started!
Click OK to view your import status on the Bulk Data Load Job page.

OK

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
View Request	View Result	7512w00000Xqrar	6/19/2023, 11:05 PM	6/19/2023, 11:05 PM	103	52	0	9	0

11. Make sure you have **0 records** under the **Records Failed** column.

Note: Perform **Field Mapping** carefully.

Here is the formatted text for your document:

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:

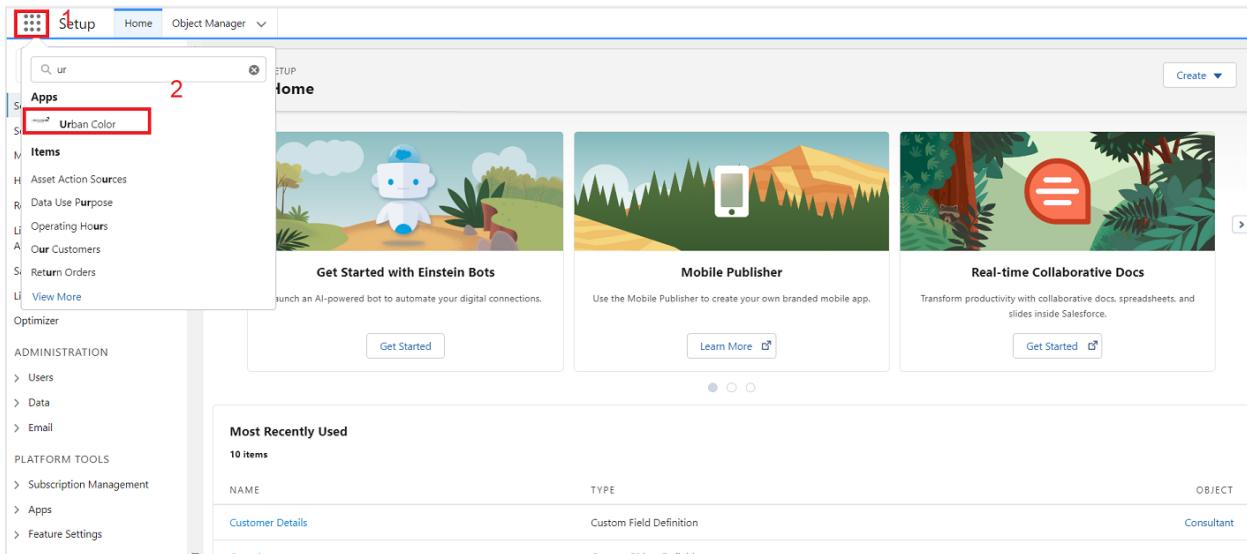
- Users can view and modify the reports and move them to/from any other folders they have access to as Editor or Manager.

3. Manager:

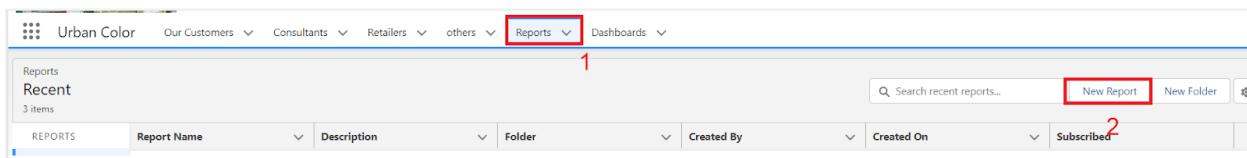
- Users can do everything Viewers and Editors can do, plus control other users' access levels to the folder.
- Managers can also delete the report.

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**.

	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

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

8. Name the bucket **Payment Type**.

9. Click **Add Bucket** and name it **NetBanking**.

10. Click **Add Bucket** and name it **Cash**.

Edit Bucket Column

* Field	X	* Bucket Name												
Payment	X	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; text-align: left;"> <tr><td style="width: 10%;">Bucket Name</td><td style="width: 90%;"><input type="text" value="2"/></td></tr> </table> <p>Unbucketed Values (4)</p> </div> <div style="flex: 1;"> <p>Search Values</p> <table border="1" style="width: 100%; border-collapse: collapse; text-align: left;"> <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> <div style="margin-top: 10px;"> <input type="checkbox"/> Bucket remaining values as Other </div> <div style="display: flex; justify-content: space-between; margin-top: 10px;"> Add Bucket Move To ▾ </div>			Bucket Name	<input type="text" value="2"/>	VALUE	BUCKET	<input type="checkbox"/> Credit Card		<input type="checkbox"/> Debit Card		<input type="checkbox"/> Upi		<input type="checkbox"/> Cash	
Bucket Name	<input type="text" value="2"/>													
VALUE	BUCKET													
<input type="checkbox"/> Credit Card														
<input type="checkbox"/> Debit Card														
<input type="checkbox"/> Upi														
<input type="checkbox"/> Cash														

Cancel
Apply

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

Edit Bucket Column

* Field	X	* Bucket Name														
Payment	X	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; text-align: left;"> <tr><td style="width: 10%;"></td><td style="width: 90%;">Net Banking (0) -pencil trash</td></tr> <tr><td style="width: 10%;"></td><td style="width: 90%;">Cash (0) -pencil trash</td></tr> </table> <p>Unbucketed Values (4)</p> </div> <div style="flex: 1;"> <p>Search Values</p> <table border="1" style="width: 100%; border-collapse: collapse; text-align: left;"> <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> <div style="margin-top: 10px;"> <input type="checkbox"/> Bucket remaining values as Other </div> <div style="display: flex; justify-content: space-between; margin-top: 10px;"> Add Bucket Move To ▾ </div>				Net Banking (0) -pencil trash		Cash (0) -pencil trash	VALUE	BUCKET	<input type="checkbox"/> Credit Card		<input type="checkbox"/> Debit Card		<input type="checkbox"/> Upi		<input type="checkbox"/> Cash	
	Net Banking (0) -pencil trash															
	Cash (0) -pencil trash															
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

The screenshot shows two consecutive steps of the 'Edit Bucket Column' process:

- Step 1:** The 'Field' is set to 'Payment' and the 'Bucket Name' is 'Payment type'. The 'All Values (4)' section on the left lists 'Net Banking (0)', 'Cash (0)', 'Unbucketed Values (4)', and a checkbox for 'Bucket remaining values as Other'. The 'Move To' button is highlighted.
- Step 2:** The 'Value' column has three items checked: 'Credit Card', 'Debit Card', and 'Upi'. These are moved to the 'Bucket' column, which contains 'Cash'.
- Step 3:** The 'Field' is still 'Payment' and the 'Bucket Name' is 'Payment type'. The 'All Values (4)' section now shows 'Net Banking (3)' and 'Cash (1)'. The 'Move To' button is highlighted.
- Step 4:** The 'Value' column has one item checked: 'Cash'. It is moved to the 'Bucket' column, which contains 'Cash'.

Edit Bucket Column

* Field: Payment * Bucket Name: Payment type

All Values (4)

Search Values

VALUE	BUCKET
Credit Card	
Debit Card	
Upi	
Cash	

Add Bucket Move To ▾

All Values (4)

Search Values

VALUE	BUCKET
Cash	Cash

Add Bucket Move To ▾

Cancel Apply

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.

The screenshot shows the 'Fields' panel and the report preview area:

- Fields >**
 - Groups:** 'GROUP ROWS' is selected, with 'Add group...' and 'Payment type' options.
 - Columns:** 'Consultant: Consultant Name', 'Delivery Type', 'Products', and 'Payment' are listed.
- Report Preview:**
 - Payment type:** A dropdown menu is open, showing 'Net Banking (7)' with records for Ajith, Babu, Chitra, Swathi, Prasad, Ajay Kumar, and Sandeep. Below it are 'Subtotal' rows for 'Cash (2)' with Dev Raj and Shankar, and a 'Total (9)' row.
 - Consultant: Consultant Name:** Shows the same list of consultants as the dropdown.
 - Delivery Type:** Shows 'Courier', 'Self Pickup', 'Eye Liner', 'Nail Polish', 'Self Pickup', 'Courier', and 'Courier' respectively.
 - Products:** Shows 'Compact', 'Face Pack', 'Debit Card', 'Upi', 'Upi', 'Lip Balm', and 'Upi' respectively.
 - Payment:** Shows 'Upi', 'Credit Card', 'Debit Card', 'Upi', 'Upi', 'Upi', and 'Upi' respectively.

15. Click **Refresh**.

16. Click **Save and Run**.

17. Give the report a name, e.g., **Consultant Report**.

REPORT ▾

New Consultants Report **Consultants**

Fields >

Outline Filters

Groups

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

GROUP COLUMNS

- Add group...

Columns

- Consultant: Consultant Name
- Delivery Type
- Products
- Payment

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

Payment type ↑ ↓

Net Banking (7)

Consultant: Consultant Name	Delivery Type	Products	Payment
Ajith	Courier	Compact	Upi
Babu	Self Pickup	Face Pack	Credit Card
Chitra	Courier	Eye Liner	Debit Card
Swathi	Courier	Nail Polish	Upi
Prasad	Self Pickup	Eye Liner	Upi
Ajay Kumar	Courier	Lip Balm	Debit Card
Sandeep	Courier	Eye Liner	Upi

Subtotal

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

Subtotal

Total (9)

18. Click **Save**.

Save Report

1

*Report Name

Report Unique Name

Report Description

2

Folder Select Folder

3

Save

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.

The screenshot shows the Salesforce Setup Home page. At the top left, there's a 'Setup' icon with a red box labeled '1'. To its right are 'Home' and 'Object Manager' buttons. Below the header is a search bar with the placeholder 'Q_ ur'. Underneath the search bar, a sidebar lists various categories: Apps (with 'Urban Color' highlighted by a red box labeled '2'), Items, Administration (with 'Users', 'Data', 'Email' listed), and Platform Tools (with 'Subscription Management', 'Apps', 'Feature Settings'). The main content area features three cards: 'Get Started with Einstein Bots', 'Mobile Publisher', and 'Real-time Collaborative Docs'. Below these cards is a section titled 'Most Recently Used' with a table showing 'Customer Details' as the most recent item. On the far right, there's a 'Create' button.

3. Click the **Reports** tab.

4. Click on the **Urban Color Report** to view the records.

The screenshot shows the Salesforce Reports page. At the top, there's a navigation bar with tabs: 'Urban Color', 'Our Customers', 'Consultants', 'Retailers', 'others', 'Reports' (which has a red box labeled '3' over it), and 'Dashboards'. Below the navigation is a search bar with 'Search recent reports...' and buttons for 'New Report' and 'New Folder'. The main content area is divided into sections: 'Recent' (containing 4 items), 'RECENT' (listing 'Consultants Report' with a red box labeled '4'), 'Created by Me', 'Private Reports', 'Public Reports' (listing 'Opportunities Details' and 'Rental New 1'), and 'All Reports'. On the left, there's a sidebar with sections for 'REPORTS', 'FOLDERS', and '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."

New Dashboard

* Name 3 Consultant Dashboard

Description

Folder Private Dashboards Select Folder 4

Cancel Create

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

Select Report

Reports

Recent

Created by Me

Private Reports

Public Reports

All Reports

Folders

Created by Me

Shared with Me

All Folders

Select Report

Search Reports and Folders...

Consultants Report
Hazarai Ajay Kumar - [REDACTED] Private Reports

Sample Flow Report: Screen Flows
Automated Process · Dec 17, 2022, 7:50 PM · Public Reports

Opportunities Details
Hazarai Ajay Kumar · Apr 13, 2023, 12:02 AM · Private Reports

Rental New 1
Hazarai Ajay Kumar · Feb 2, 2023, 10:43 PM · Public Reports

Cancel Select

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

Net Banking 7

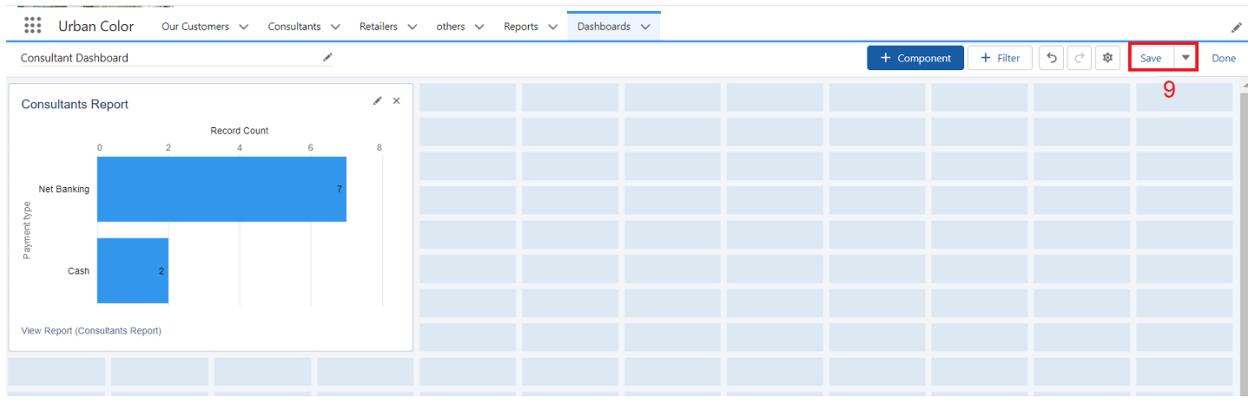
Cash 2

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

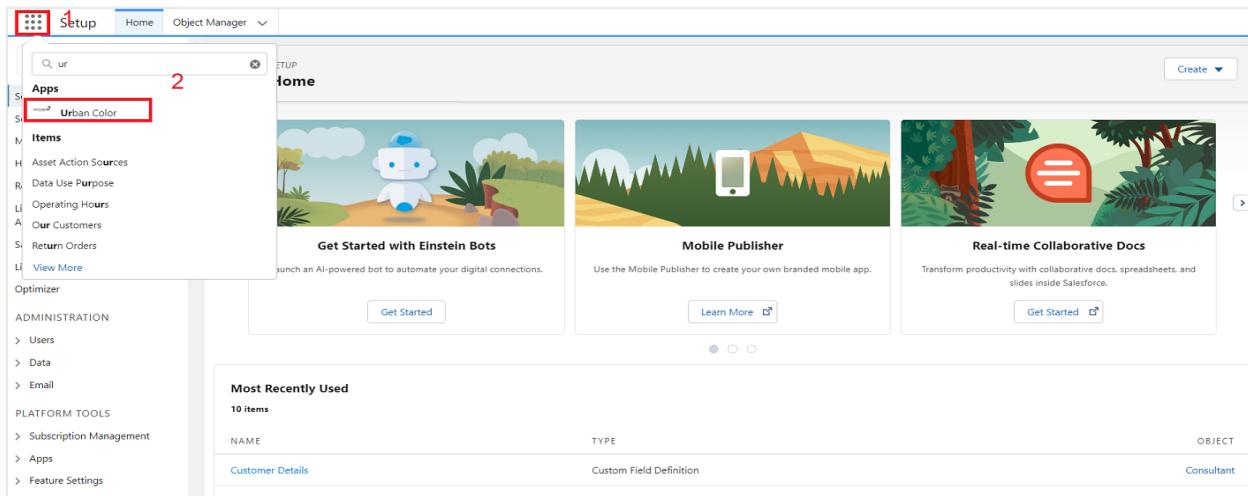
To view the dashboard, follow these steps:

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, and a search bar labeled 'Search recent dashboards...'. A red box highlights the 'Dashboards' link in the navigation bar, and a red number '3' is placed to its right, indicating three items in the dropdown menu.

The main area is titled 'Recent' and shows a table with three items:

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

On the left side, there are navigation links: 'All Dashboards' and 'FOLDERS'.