

# Cosmetics Store Management

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## ABSTRACT

In the rapidly evolving world of retail, managing customer relationships, inventory, and sales processes effectively is crucial for success. The *Cosmetics Store Management* project leverages Salesforce to provide a streamlined solution that empowers cosmetic store owners and managers to handle their operations with increased efficiency and accuracy.

The solution integrates various features of Salesforce to facilitate better management of customers, consultants, and retailers, offering a comprehensive platform for operational oversight. By utilizing a centralized system, *Cosmetics Store Management* improves the following key areas:

- **Customer Relationship Management (CRM):** Track customer preferences, interactions, and history to provide personalized services and drive customer loyalty.
- **Inventory Management:** Optimize product stock levels, monitor item availability, and streamline the supply chain from suppliers to store shelves.
- **Sales Monitoring:** Gain real-time insights into sales trends, performance, and profitability across multiple channels.

## Key Features:

- **Centralized Management Dashboard:** A powerful interface offering real-time insights into customer data, sales figures, and inventory management.
- **Consultant Management:** Efficient tracking and management of consultants to ensure seamless collaboration between sales personnel and customers.
- **Custom Reporting & Analytics:** Generate dynamic reports on various aspects of store operations, providing actionable insights for continuous improvement.

By utilizing Salesforce's robust tools, *Cosmetics Store Management* not only improves operational efficiency but also elevates customer engagement, ensuring that retail cosmetic businesses can thrive in a competitive market.

## INTRODUCTION

### INTRODUCTION

Retail cosmetic stores face unique challenges in managing customer relationships, inventory, and sales operations. To address these challenges, the *Cosmetics Store Management* project harnesses the capabilities of the Salesforce platform, delivering a comprehensive system designed specifically to streamline and optimize operations within the cosmetic retail industry.

This project introduces a cloud-based solution where store managers can effortlessly handle the complexities of customer service, consultant management, and inventory tracking. The system is tailored to meet the needs of various stakeholders—store owners, sales consultants, and retail partners—enabling them to manage daily tasks more efficiently.

#### Key Benefits:

- **Enhanced Customer Engagement:** The system provides a complete view of customer interactions, allowing stores to deliver personalized experiences and build long-term relationships with their clientele.
- **Improved Workflow Efficiency:** Automation of routine processes such as inventory tracking and sales reporting reduces manual effort, helping staff focus on delivering superior customer service.
- **Scalable for Growth:** As stores expand, the platform can scale to accommodate new locations, products, and sales channels, ensuring that operations remain efficient even with business growth.

*Cosmetics Store Management* is a transformative project for the retail cosmetics industry, enabling stores to not only manage their current operations efficiently but also prepare for future growth and customer demands. By integrating Salesforce, this project delivers a modern, flexible solution that enhances operational efficiency and fosters a deeper connection with customers.

## INDEX

1. Introduction
2. Objects
3. Fields & Relationships
4. Page Layout
5. Lightning App
6. Profiles
7. Roles
8. Users
9. Reports
10. Dashboards
11. Conclusion

## OBJECTS

The following objects were created in the Cosmetics Store Management system:

### 1. Our Customers

The screenshot shows the Salesforce Object Manager interface for the 'Our Customer' object. The left sidebar contains a list of configuration categories: 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 area is titled 'Details' and contains the following fields:

Field	Value
Description	
API Name	Our_Customer__c
Custom	<input checked="" type="checkbox"/>
Singular Label	Our Customer
Plural Label	Our Customers
Enable Reports	<input checked="" type="checkbox"/>
Track Activities	<input checked="" type="checkbox"/>
Track Field History	<input checked="" type="checkbox"/>
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Buttons: Edit, Delete

### 2. Consultants

The screenshot shows the Salesforce Object Manager interface for the 'Consultant' object. The left sidebar contains the same list of configuration categories as the first screenshot. The main area is titled 'Details' and contains the following fields:

Field	Value
Description	
API Name	Consultant__c
Custom	<input checked="" type="checkbox"/>
Singular Label	Consultant
Plural Label	Consultants
Enable Reports	<input checked="" type="checkbox"/>
Track Activities	<input checked="" type="checkbox"/>
Track Field History	<input checked="" type="checkbox"/>
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Buttons: Edit, Delete

### 3. Retailers

Setup

Home

Object Manager

Search Setup

Setup > OBJECT MANAGER

Retailers

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

Details

Description

API Name

Retailers\_\_c

Custom

✓

Singular Label

Retailers

Plural Label

Retailers

Enable Reports

✓

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

EditDelete

### 4. Others

Setup

Home

Object Manager

Search Setup

Setup > OBJECT MANAGER

others

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

Details

Description

API Name

others\_\_c

Custom

✓

Singular Label

others

Plural Label

others

Enable Reports

✓

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

EditDelete

## FIELDS & RELATIONSHIPS

An object relationship in Salesforce is a two-way association between two objects. Relationships are created by creating custom relationship fields on an object. This is done so that when users view records, they can also see and access related data.

### Fields in Our Customers objects

Fields in Our Customers objects follow below data types:

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

The screenshot shows the Salesforce Setup interface for the 'Our Customer' object. The 'Fields & Relationships' section is active, displaying a list of 10 fields. The fields are sorted by Field Label. The table includes 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(80)), Email Id (Email), Last Modified By (Lookup(User)), Mobile Number (Phone), Our Customer Name (Text(80)), 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(80)		
Email Id	Email_Id__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Mobile Number	Mobile_Number__c	Phone		
Our Customer Name	Name	Text(80)		✓
Owner	OwnerId	Lookup(User Group)		✓






## Fields in Consultants objects


Fields in Consultants objects follow below data types:

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

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












[Setup](#)

[Home](#)

[Object Manager](#)

To exit full screen, move mouse to top of screen or press **F11**



SETUP > OBJECT MANAGER

Consultant

Details

Fields & Relationships

13 items, sorted by Field Label

[New](#)
[Deleted Fields](#)
[Field Dependencies](#)
[Set History Tracking](#)

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Text(255)		
Consultant Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Customer details	Customer_details__c	Lookup(Our Customer)		✓
Customer id	Customer_id__c	Auto Number		
Customer Name	Customer_Name__c	Text(2)		
Delivery Type	Delivery_Type__c	Picklist		
Email	Email__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)		

## Fields in Retailers objects

Fields in Retailers objects follow below data types:

S No	Field Label	Data Type
1	Customer id	Auto Number
2	Customer Name	Text
3	Mobile Number	Phone
4	Email id	Email
5	Delivery Type 1)Self Pickup 2)Courier	Picklist
6	Products 1)Lipstick 2)Compact 3)EyeLiner 4)FacePack 5)Lip Balm	Multi-Picklist
	6)Nail Polish	
7	Payment 1)Debit Card 2)Credit Card 3)UPI 4)Cash	Picklist
8	Customer Details	Master-Detail Relationship (Our Customers Object)



[Setup](#)
[Home](#)
[Object Manager](#)

Setup > OBJECT MANAGER

Retailers

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

Fields & Relationships

11 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED	
Created By	CreatedById	Lookup(User)			
Customer Details	Customer_Details__c	Master-Detail(Our Customer)		✓	
Customer id	Customer_id__c	Auto Number			
Customer Name	Customer_Name__c	Text(80)			
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	Name	Text(80)		✓	

# Fields in Others objects

Fields in Others objects follow below data types:

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

### 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

### Fields & Relationships

8 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

### Field Dependencies

[Set History Tracking](#)

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Coupon	Coupon_c	Text(10)		
Created By	CreatedById	Lookup(User)		
Employee	Employee__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Text(80)		
others Name	Name	Text(80)		✓
Owner	OwnerId	Lookup(User,Group)		✓
Products	Products__c	Picklist (Multi-Select)		

## PAGE LAYOUTS

In Salesforce, page layouts define the organisation 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 organisation.

The screenshot displays the Salesforce Setup interface, specifically the 'Page Layouts' configuration page for the 'Consultant' object. The left sidebar shows the navigation menu with 'Page Layouts' selected. The main content area is titled 'Consultant' and shows the 'Page Layouts' section. A 'Quick Find' search bar is at the top. Below it, a table lists the fields and their properties for the 'Consultant' object. The table has columns for 'Field Name', 'Created By', 'Delivery Type', and 'Owner'. The fields listed are: 'Blank Space' (Created By: Customer details, Delivery Type: Email, Owner: Payment), 'Address' (Created By: Customer details, Delivery Type: Email, Owner: Products), 'Consultant Name' (Created By: Customer Name, Delivery Type: Mobile Number, Owner: Mobile Number), and 'Consultant Name' (Created By: Customer Name, Delivery Type: Mobile Number, Owner: Mobile Number). Below the table, the 'Consultant Detail' page layout is shown, featuring a 'Standard Buttons' section with buttons for 'Edit', 'Delete', 'Clone', 'Change Owner', 'Change Record Type', 'Printable View', 'Sharing', 'Sharing Hierarchy', and 'Edit Labels'. The layout also includes sections for 'Information' (Header visible on edit only), 'System Information' (Header visible on edit only), and 'Custom Links' (Header visible on edit only). The 'Mobile Cards (Salesforce mobile only)' section is also visible, with a note to drag expanded lookups and mobile-enabled Visualforce pages here to display them as mobile cards.

Field Name	Created By	Delivery Type	Owner
Blank Space	Customer details	Email	Payment
Address	Customer details	Email	Products
Consultant Name	Customer Name	Mobile Number	Mobile Number
Consultant Name	Customer Name	Mobile Number	Mobile Number

**Consultant Detail**

Standard Buttons: [Edit](#) [Delete](#) [Clone](#) [Change Owner](#) [Change Record Type](#) [Printable View](#) [Sharing](#) [Sharing Hierarchy](#) [Edit Labels](#)

Information (Header visible on edit only)

Consultant Name: Sample Text  
Customer Id: GEN-2004-001234  
Customer Name: Sample Text  
Mobile Number: 1-415-555-1212  
Delivery Type: Sample Text  
Address: Sample Text  
Email: sarah.sample@company.com  
Products: Sample Text  
Payment: Sample Text  
Customer details: Sample Text

Owner: Sample Text

System Information (Header visible on edit only)

Created By: Sample Text  
Last Modified By: Sample Text

Custom Links (Header visible on edit only)

**Mobile Cards (Salesforce mobile only)**

Drag expanded lookups and mobile-enabled Visualforce pages here to display them as mobile cards.

## 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.

To create a lightning app page:

1. Go to setup page --> search “app manager” in quick find --> select “app manager” --> click on New lightning App.
2. Fill the app name as Urban Color in app details and branding --> Next --> (App option page) keep it as default --> Next --> (Utility Items) keep it as default --> Next.
3. To Add Navigation Items:
4. Select the items (Our Customers,Consultants,Retailers,Others,Reports,Dashboards ) from the search bar and move it using the arrow button --> Next.
5. To Add User Profiles:
6. Search profiles (System administrator) in the search bar --> click on the arrow button --> save & finish.

## PROFILES

Profiles control what users can access in the system. For this project, the following profiles were created:

1. Store Supervisor: Full access to all objects.

Creating a Store Supervisor profile and setting its 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, then click Edit.
7. Scroll down to Custom Object Permissions and give access for Create,Read,Edit,Delete,View all and modify all for Our Customers,Consultants,Retailers,Others.
8. Scroll down to Custom App Settings and give access for Urban Color.

The screenshot shows the Salesforce 'Profiles' setup page for a profile named 'Store Supervisor'. The page is divided into several sections:

- Profile Detail:** Shows the profile name 'Store Supervisor', user license 'Salesforce', and a description. It also indicates the profile was created by 'Jatin Thakur' on 2/19/2024 at 8:02 pm and modified by the same user on 2/19/2024 at 8:08 pm.
- Page Layouts:** A table showing the assignment of page layouts to various objects. The objects listed include Global, Email Application, Home Page Layout, Account, Alternative Payment Method, Appointment Invitation, Asset, Asset Action, Asset Action Source, Asset Relationship, Asset State Period, Assigned Resource, Associated Location, Async Operation Log, Authorization Form, Authorization Form Consent, and Authorization Form Data Use. The page layouts assigned to these objects are: Global Layout, Not Assigned, DE Default, Account Layout, Alternative Payment Method Layout, Appointment Invitation Layout, Asset Layout, Asset Action Layout, Asset Action Source Layout, Asset Relationship Layout, Asset State Period Layout, Assigned Resource Layout, Associated Location Layout, Async Operation Log Layout, Authorization Form Layout, Authorization Form Consent Layout, and Authorization Form Data Use Layout.
- Standard Object Layouts:** A table showing the assignment of standard object layouts to various objects. The objects listed include Global, Email Application, Home Page Layout, Account, Alternative Payment Method, Appointment Invitation, Asset, Asset Action, Asset Action Source, Asset Relationship, Asset State Period, Assigned Resource, Associated Location, Async Operation Log, Authorization Form, Authorization Form Consent, and Authorization Form Data Use. The standard object layouts assigned to these objects are: Global Layout, Not Assigned, DE Default, Account Layout, Alternative Payment Method Layout, Appointment Invitation Layout, Asset Layout, Asset Action Layout, Asset Action Source Layout, Asset Relationship Layout, Asset State Period Layout, Assigned Resource Layout, Associated Location Layout, Async Operation Log Layout, Authorization Form Layout, Authorization Form Consent Layout, and Authorization Form Data Use Layout.

## 2. Billing Operator: Limited access, primarily for managing payments.

Similarly Create operator profile ,Clone Salesforce Platform user and give access only for Billing Operator.

The screenshot shows the Salesforce Setup interface for the 'Billing Operator' profile. The left sidebar contains navigation links for 'Users' and 'Profiles'. The main content area is titled 'Profiles' and 'Billing Operator'. It includes a 'Profile Detail' section with fields for Name, User License, Description, and Created By. Below this is a 'Page Layouts' section showing a grid of standard object layouts and their corresponding page layouts. The grid is organized into two columns, with each cell containing a link to view the layout.

**Profile Detail**

Name	Billing Operator	Custom Profile	✓
User License	Salesforce Platform		
Description			
Created By	John Thapar 21/09/2024, 8:11 pm	Modified By	John Thapar 21/09/2024, 8:15 pm

**Page Layouts**

Standard Object Layouts	Global	Lead
Global	<a href="#">Global Layout (View Assignment)</a>	<a href="#">Lead Layout (View Assignment)</a>
Email Application	<a href="#">Not Assigned (View Assignment)</a>	<a href="#">Location Layout (View Assignment)</a>
Home Page Layout	<a href="#">Home Page Default (View Assignment)</a>	<a href="#">Location Group Layout (View Assignment)</a>
Account	<a href="#">Account Layout (View Assignment)</a>	<a href="#">Location Group Assignment Layout (View Assignment)</a>
Alternative Payment Method	<a href="#">Alternative Payment Method Layout (View Assignment)</a>	<a href="#">Object Milestone Layout (View Assignment)</a>
Appointment Invitation	<a href="#">Appointment Invitation Layout (View Assignment)</a>	<a href="#">Operating Hours Layout (View Assignment)</a>
Asset	<a href="#">Asset Layout (View Assignment)</a>	<a href="#">Order Layout (View Assignment)</a>
Asset Relationship	<a href="#">Asset Relationship Layout (View Assignment)</a>	<a href="#">Order Product Layout (View Assignment)</a>
Assigned Resource	<a href="#">Assigned Resource Layout (View Assignment)</a>	<a href="#">Payment Layout (View Assignment)</a>
Associated Location	<a href="#">Associated Location Layout (View Assignment)</a>	<a href="#">Payment Authorization Layout (View Assignment)</a>
Async Operation Log	<a href="#">Async Operation Log Layout (View Assignment)</a>	<a href="#">Payment Authorization Adjustment Layout (View Assignment)</a>
Authorization Form	<a href="#">Authorization Form Layout (View Assignment)</a>	<a href="#">Payment Gateway Layout (View Assignment)</a>
Authorization Form Consent	<a href="#">Authorization Form Consent Layout (View Assignment)</a>	<a href="#">Payment Gateway Log Layout (View Assignment)</a>
Authorization Form Data Use	<a href="#">Authorization Form Data Use Layout (View Assignment)</a>	<a href="#">Payment Group Layout (View Assignment)</a>
Authorization Form Text	<a href="#">Authorization Form Text Layout (View Assignment)</a>	<a href="#">Payment Line Invoice Layout (View Assignment)</a>
Business Brand	<a href="#">Business Brand Layout (View Assignment)</a>	<a href="#">Price Book Layout (View Assignment)</a>
Campaign Member	<a href="#">Campaign Member Page Layout (View Assignment)</a>	<a href="#">Price Book Entry Layout (View Assignment)</a>

## ROLES

Roles determine the level of access a user has to records within Salesforce. In this project, we created two roles:

1. Store Head: Manages overall store operations and has access to all records.
2. Billing Operator: Manages payment-related tasks with restricted access.

### Setup Roles

- a) Click on the Gear Icon
- b) Click "Setup"
- c) In the Quick Find box, enter "Roles"
- d) Click "Roles"
- e) Click on "Set Up Roles"
- f) Click "Expand All"
- g) Under the CEO, click on "Add Role"
- h) Fill up the Label as Store Head, Role Name Store\_Head.
- i) Enter a Role name that will be displayed on Report.
- j) Click Save

Similarly create One Roles under Store Head as Billing Operator.

The screenshot displays the Salesforce Setup interface for creating a new role. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar on the left contains the text 'roles'. The left sidebar shows a tree view with 'Users' expanded, and 'Roles' selected. The main content area is titled 'Role Edit' and 'New Role'. The 'Role Edit' form contains the following fields:

- Label:** Store Head
- Role Name:** Store\_Head
- This role reports to:** thesmartbridge.com
- Role Name as displayed on reports:** (empty field)

At the bottom right of the form are three buttons: 'Save', 'Save & New', and 'Cancel'.

Setup

Home

Object Manager

roles

Users

**Roles**

Feature Settings

Sales

Contact Roles on Contracts

Contact Roles on Opportunities

Service

Case Teams

Case Team Roles

Contact Roles on Cases

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

SETUP

Roles

Role Edit

New Role

Help for this Page

Role Edit

Label

Billing Operator

Role Name

Billing\_Operator

This role reports to

Store Head

Role Name as displayed on reports

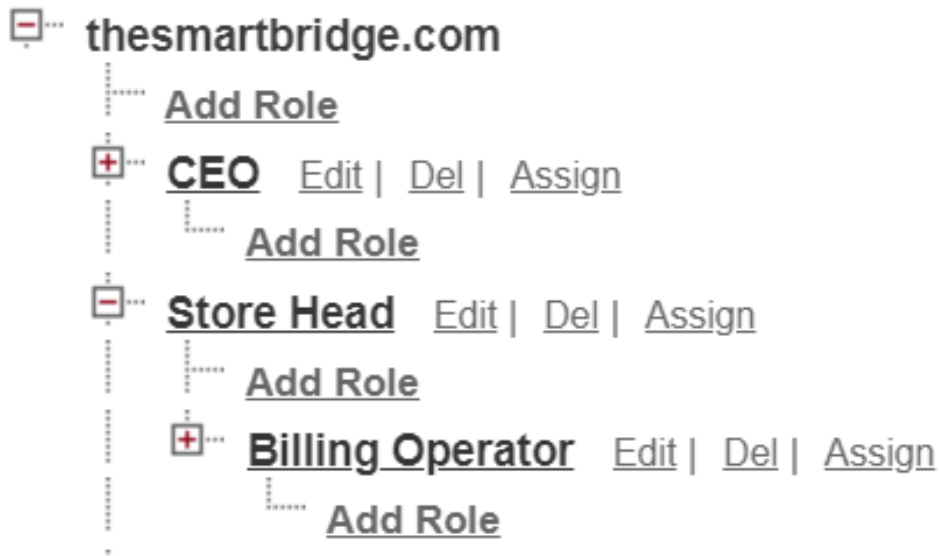
Save

Save & New

Cancel

## Your Organization's Role Hierarchy

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





## 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.

For this project, two users were created:

### 1. Amar K (Store Head)

The screenshot shows the Salesforce 'Users' page for a user named Amar K. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area displays the 'User Detail' for Amar K, including fields for Name, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Manager, Role, Profile, and various permissions and settings. The user is created by jatin.thakur on 21/09/2024 at 8:28 pm.

Field	Value
Name	Amar K
Email	amar.k123@salesforce.com
Username	amar.k123@salesforce.com
Nickname	Amar K
Title	Store Supervisor
Company	
Department	
Division	
Address	474008 Madhya Pradesh India
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Locale	English (India)
Language	English
Manager	
Role	Store Supervisor
Profile	Store Supervisor
Permissions	Marketing User, Office User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, WDC User, Mobile Push Registrations, Accessibility Mode (Classic Only), High-Contrast Palette on Charts, Load Lightning Pages While Scrolling, Salesforce CRM Content User, Receive Salesforce CRM Content Email Alerts, Receive Salesforce CRM Content Alerts as Daily Digest, Make Setup My Default Landing Page, Allow Forwarding, No MHO Updates, Call Center, Phone, Extension, Fax, Mobile, Email Encoding, Unchecked (UTF-8), Employee Number, Used Date Range, Used File Space, Last Login, Last Password Change or Reset, Failed Login Attempts

### 2. John Teddy (Billing Operator)

The screenshot shows the Salesforce 'Users' page for a user named John Teddy. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area displays the 'User Detail' for John Teddy, including fields for Name, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Manager, Role, Profile, and various permissions and settings. The user is created by jatin.thakur on 21/09/2024 at 8:30 pm.

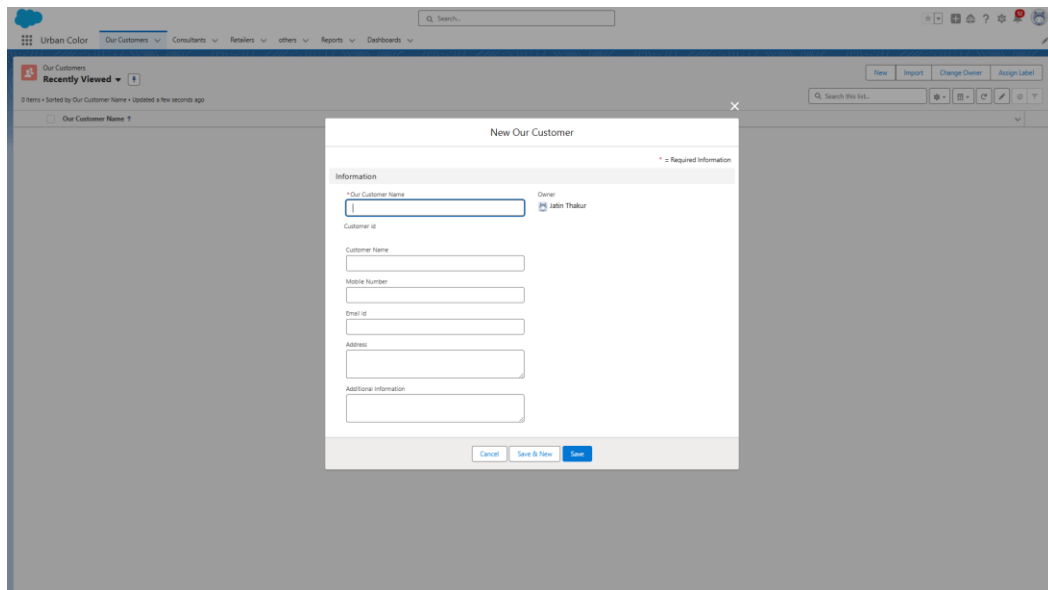
Field	Value
Name	John Teddy
Email	john.teddy123@salesforce.com
Username	john.teddy123@salesforce.com
Nickname	John
Title	
Company	
Department	
Division	
Address	474008 Madhya Pradesh India
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Locale	English (India)
Language	English
Manager	
Role	Billing Operator
Profile	Billing Operator
Permissions	Marketing User, Office User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, WDC User, Mobile Push Registrations, Accessibility Mode (Classic Only), High-Contrast Palette on Charts, Load Lightning Pages While Scrolling, Salesforce CRM Content User, Receive Salesforce CRM Content Email Alerts, Receive Salesforce CRM Content Alerts as Daily Digest, Make Setup My Default Landing Page, Allow Forwarding, No MHO Updates, Call Center, Phone, Extension, Fax, Mobile, Email Encoding, Unchecked (UTF-8), Employee Number, Used Date Range, Used File Space, Last Login, Last Password Change or Reset, Failed Login Attempts

## USER ADOPTION

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

### Create Our Customer Record

1. Click on App Launcher on left side of screen.
2. Search Urban Color & click on it.
3. Click on Our Customer tab.
4. Click new button
5. Fill all Our Customer record details.
6. Click on Save Button



The screenshot shows a web application interface for managing customers. A modal window titled "New Our Customer" is open, displaying a form for creating a new customer record. The form includes fields for "Our Customer Name" (with a dropdown menu showing "Our Customer Name" and "Latin Thakur"), "Customer id", "Customer Name", "Mobile Number", "Email id", "Address", and "Additional Information". The "Our Customer Name" field is marked as required with an asterisk. At the bottom of the modal, there are buttons for "Cancel", "Save & New", and "Save". The background shows a dashboard with a search bar and a list of customers.

## View Record (Our Customer)

1. Click on App Launcher on the left side of the screen.
2. Search Urban Color & click on it.
3. Click on Our Customer Tab.
4. Click on any record name. you can see the details of the Our Customer

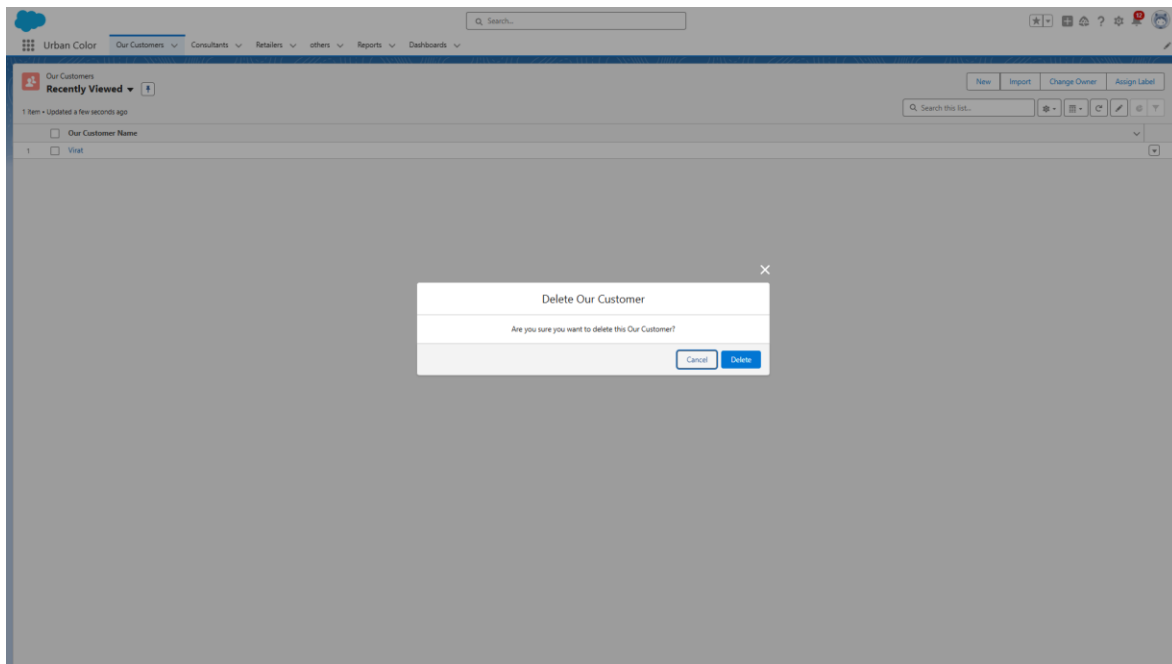
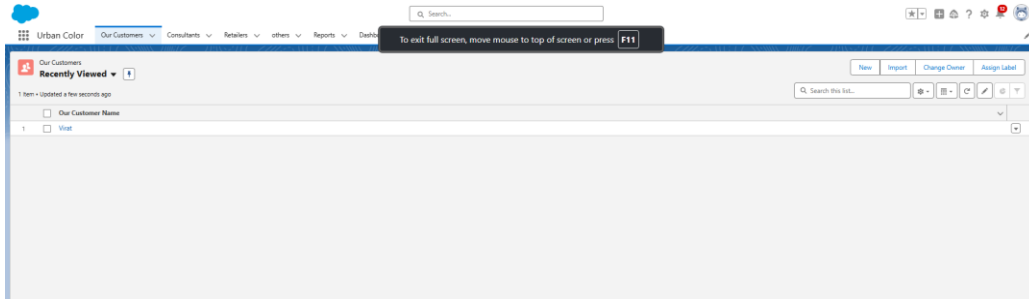
The screenshot displays the 'Our Customer' record details for a customer named 'Virat'. The interface includes a top navigation bar with tabs for 'Our Customers', 'Consultants', 'Retailers', 'others', 'Reports', and 'Details'. A search bar is located at the top right. The main content area is divided into two sections: 'Related' and 'Details'. The 'Details' section contains a form with the following fields:

Field	Value	Action
Our Customer Name	Virat	✎
Customer id	2	
Customer Name		✎
Mobile Number	1234567891	✎
Email id		✎
Address		✎
Additional Information		✎
Created By	jatin Thakur, 27/09/2024, 6:56 pm	
Last Modified By	jatin Thakur, 27/09/2024, 6:56 pm	

At the top right of the details section, there are buttons for 'New Contact', 'Edit', and 'New Opportunity'.

## Delete Record (Our Customer)

1. Click on App Launcher on the left side of the screen.
2. Search Urban Color & click on it.
3. Click on Our Customer Tab.
4. Click on Arrow at right hand side on that Particular record.
5. Click delete and delete again.



## IMPORT DATA

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

1. From Setup, click the Home tab.
2. In the Quick Find box, enter Data Import and select Data Import Wizard
3. Click Launch Wizard!
4. Click the Custom Objects tab and select the Consultant object.
5. Select Add new records.
6. Click CSV and choose file Consultant\_CSV which we made earlier. Click Next.
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.
8. The next screen gives you a summary of your data import. Click Start Import.

## REPORTS

### What are Reports?

Reports in Salesforce is a list of records that meet a particular criterion which gives an answer to a particular question. These records are displayed as a table that can be filtered or grouped based on any field.

There are 4 types of report formats in Salesforce:

1. **Tabular Reports:**  
This is the most basic report format. It just displays the row of records in a table with a grand total. While easy to set up they can't be used to create groups of data or charts and also cannot be used in Dashboards. They are mainly used to generate a simple list or a list with a grand total.
2. **Summary Reports:**  
It is the most commonly used type of report. It allows grouping of rows of data, view subtotal, and create charts.
3. **Matrix Report:**  
It is the most complex report format. Matrix report summarizes information in a grid format. It allows records to be grouped by both columns and rows. It can also be used to generate dashboards. Charts can be added to this type of report.
4. **Joined Reports:**  
These types of reports let us create different views of data from multiple report types. The data in joined reports are organized in blocks. Each block acts as a subreport with its own fields, columns, sorting, and filtering. They are used to group and show data from multiple report types in different views.

### Report types:

Report type determines which set of records will be available in a report. Every report is based on a particular report type. The report type is selected first when we create a report. Every report type has a primary object and one or more related objects. All these objects must be linked together either directly or indirectly.

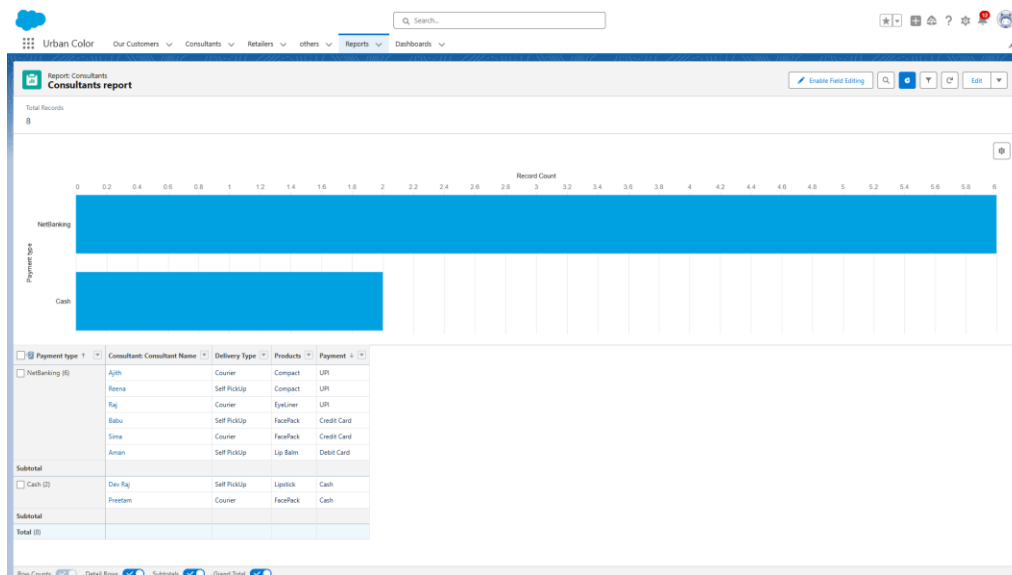
- A report type cannot include more than 4 objects.
- Once a report is created its report type cannot be changed.

There are 2 types of report types:

1. **Standard Report Types:**  
Standard Report Types are automatically included with standard objects and also with custom objects where “Allow Reports” is checked.  
Standard report types cannot be customized and automatically include standard and custom fields for each object within the report type. Standard report types get created when an object is created, also when a relationship is created.  
**Note:** Standard report types always have inner joins.
2. **Custom Report Types:**  
Custom report types are reporting templates created to streamline the reporting process. Custom Reports are created by an administrator or User with “Manage Custom Report Types” permission. Custom report types are created when standard report types cannot specify which records will be available on reports.  
In custom report types we can specify objects which will be available in a particular report. The primary object must have a relationship with other objects present in a report type either directly or indirectly.

There are 3 types of access levels of folders:

1. **Viewer:**  
With this access level, users can see the data in a report but cannot make any changes except cloning it into a new report.
2. **Editor:**  
With this access level, users can view and modify the reports it contains and can also move them to/from any other folders they have access level as Editor or Manager.
3. **Manager:**  
With this access level, users can do everything Viewers & Editors can do, plus they can also control other user’s access levels to this folder. Also, users with Manager Access levels can delete the report.







## DASHBOARDS

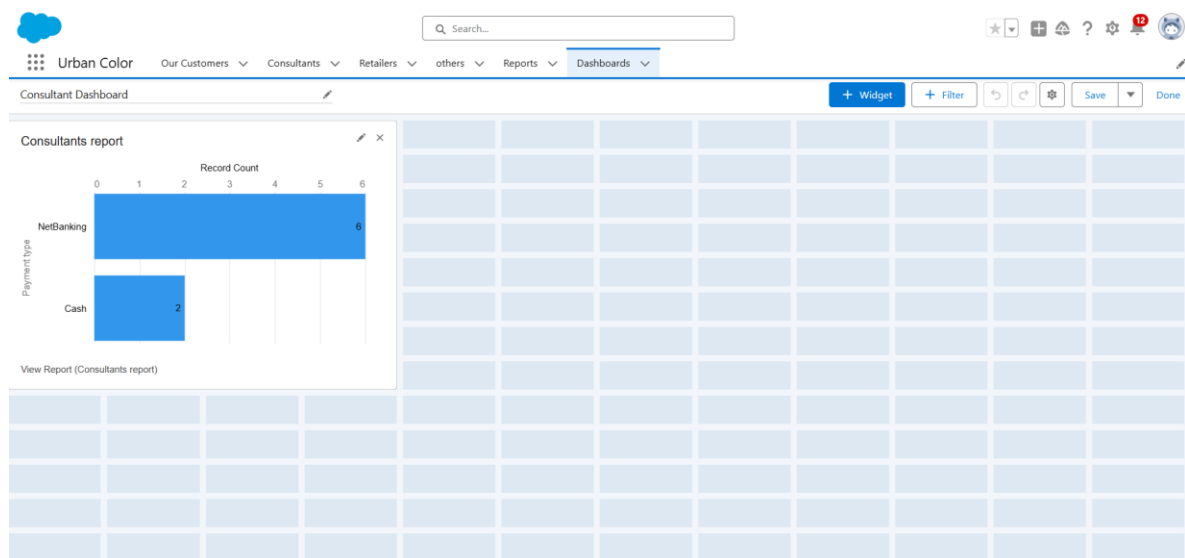
Dashboards let you curate data from reports using charts, tables, and metrics. If your colleagues need more information, then they're able to view your dashboard's data supplying reports. Dashboard filters make it easy for users to apply different data perspectives to a single dashboard.

### Create Dashboard

1. Click on the Dashboards tab from the Urban Color application.
2. Click on the new dashboard.
3. Give name- Consultant Dashboard
4. Click create
5. Give your dashboard a name and click on +component
6. Select the Consultants Report which you created.
7. For the data visualization select any of the chart, table etc. as per your choice/requirement.
8. Click add.
9. Click save.

### View Dashboard

1. Click on App Launcher on the left side of the screen.
2. Search Candidate Internal Result Card & click on it.
3. Click on Dashboard Tab.
4. Click on Candidate Internal Result Card see graph view of records



## CONCLUSION

By using the Salesforce platform, the Cosmetics Store Management project successfully created a system that streamlines operations, improves customer engagement, and enhances overall efficiency. The project showcases the power of Salesforce in handling complex workflows and data management tasks for retail businesses.