

Cosmetics Store Management

Description :

Cosmetics Store Management in Salesforce is a solution that helps cosmetics store manage their operations efficiently and effectively. The solution is built on the Salesforce platform, which provides a powerful and scalable platform for managing customer relationships, sales, and inventory. Cosmetics stores improve their operational efficiency, enhance customer engagement, and drive growth.

Summary :

1. **Key Features: Customer Management:**

- **Contacts & Accounts:** Efficiently manage customer details, including contact information, purchase history, and preferences.
- **Customer Segmentation:** Segment customers based on various criteria such as purchase frequency, product preference, and location for targeted marketing.

2. **Product Management:**

- **Product Catalog:** Maintain an up-to-date catalog of cosmetic products with detailed descriptions, pricing, and availability.
- **Inventory Tracking:** Monitor stock levels, set reorder points, and track inventory turnover to ensure optimal stock levels.

3. **Sales Management:**

- **Order Processing:** Automate the order management process, including order creation, status tracking, and invoicing.
- **Sales Analytics:** Generate reports and dashboards to analyze sales trends, identify top-selling products, and forecast future sales.

4. **Marketing & Promotions:**

- **Campaign Management:** Create and manage marketing campaigns, including email promotions, discounts, and special offers.
- **Customer Engagement:** Use Salesforce tools to engage with customers through personalized offers and targeted marketing.

5. **Customer Service:**

- **Case Management:** Track and resolve customer service issues and complaints efficiently.
- **Knowledge Base:** Provide customers with access to a self-service portal for FAQs, product information, and troubleshooting.

6. **Integration & Automation:**

- **Salesforce Integration:** Integrate with other systems such as ERP or e-commerce

- **Workflow Automation:** Automate repetitive tasks and processes to increase operational efficiency and reduce manual errors

TASKS :

1.Creating the Objects :

To Create an object:

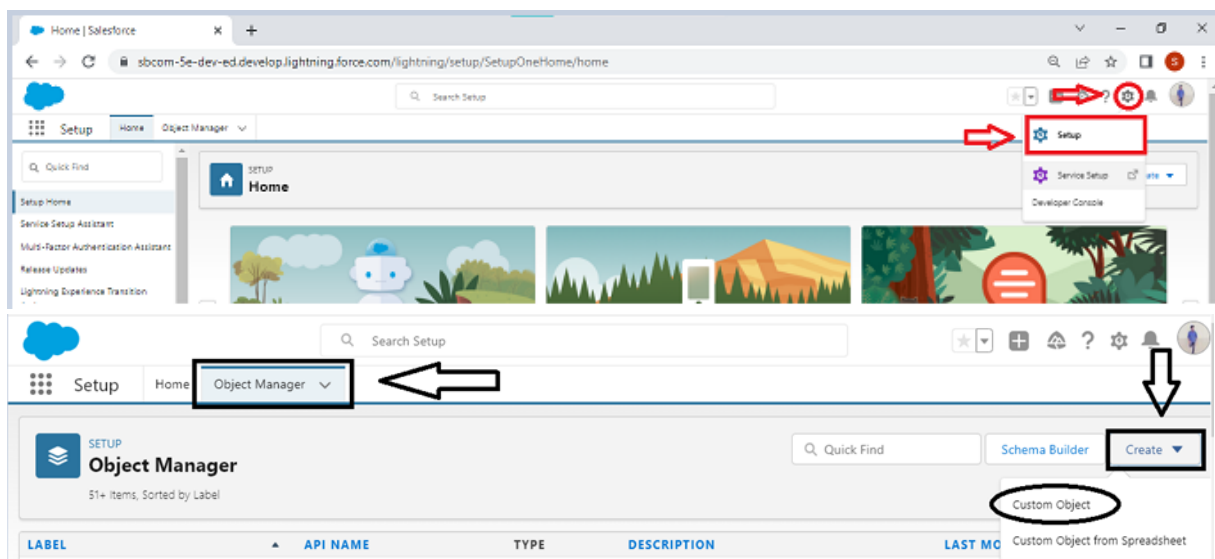
Creation of Objects for Urban Color, For this Urban Color we need to create 3 objects i.e „Our Customers,Consultants,Retailers,others.

The below steps will assist you in creating those objects.

- Click on the gear icon and then select Setup.
- Click on the object manager tab just beside the home tab.
- After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
- Creation of Our Customer Object

On the Custom Object Definition page, create the object as follows:

- Label: Our Customer
- Plural Label: Our Customers
- Record Name: Our Customer
- Check the Allow Reports checkbox
- Check the Allow Search checkbox
- Click Save.
- Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs.
- Under Custom Object Tabs, click New.
- For Object, select Our Customer.
- For Tab Style, select any icon.
- Leave all defaults as is. Click Next, Next, and Save.



We need to create 4 objects named Our customer,Consultant,Retailer,Others.

For creating the another 3 objects,we need t follow the same procedure as mentioned above.

After the completion of object creation task,We'll move on to further steps.

Task2 : Creating Fields and Relationship :

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

Fields in Our Customers objects :

Fields in Our Customers objects follow below data types:

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

Fields in Consultants objects

Fields in Consultants objects follow below data types:

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

Fields in Retailers objects

Fields in Retailers objects follow below data types:

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

Fields in Others objects

Fields in Others objects follow below data types:

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

- In the Cosmetic Store Management System built on Salesforce, fields and relationships are designed to streamline operations and enhance data management. Key fields include customer details (e.g., contact information and purchase history), product specifics (e.g., SKU, price, and inventory levels), order details (e.g., order status and shipping info), marketing campaign attributes, and case management elements. Relationships are structured to connect these fields efficiently: customers can have multiple orders and cases, each order can include multiple products, and products are linked to inventory and suppliers.

1. **Task 3: Page Layout creation :**

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.

SETUP > OBJECT MANAGER
Consultant

Details
Fields & Relationships
Page Layouts 1
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters

Page Layouts
1 Items, Sorted by Page Layout Name

Quick Find New Page Layout Assignment

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Consultant Layout 2	Hazari Ajay Kumar, 4/1/2023, 7:25 AM	Hazari Ajay Kumar, 6/18/2023, 10:30 PM

thesmartbridgecom2-dev-ed.develop.lightning.force.com/lightning/.../view

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

SETUP > OBJECT MANAGER
Consultant

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields

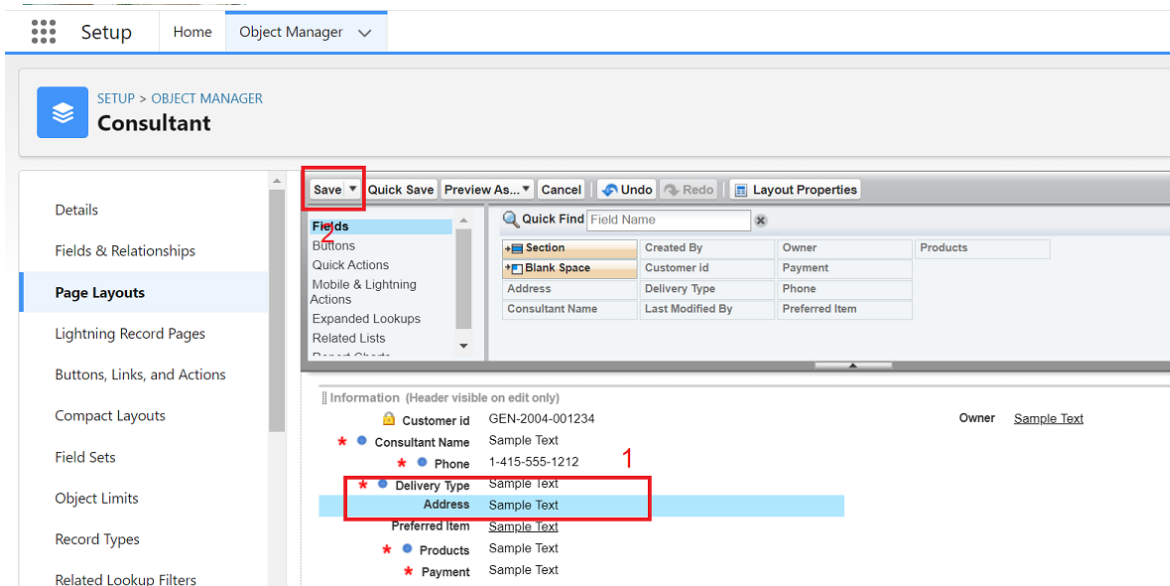
Quick Find Field Name

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

Information (Header visible on edit only)

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

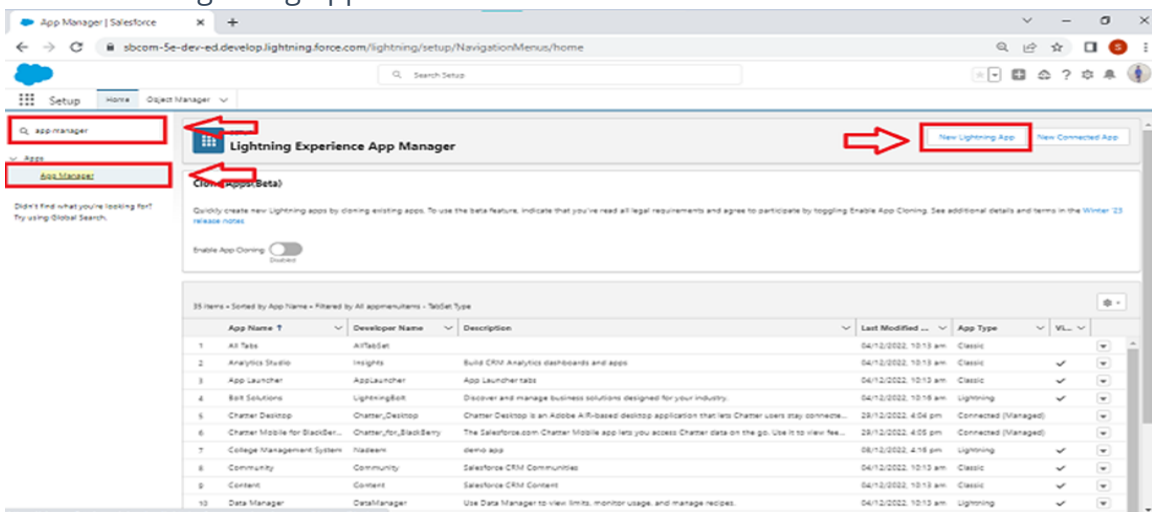
5. Click on Save



- Creating a page layout in Salesforce involves navigating to the object manager, selecting the relevant object, and either creating a new layout or editing an existing one. You can design the layout by dragging and dropping fields, adding sections and related lists, and including buttons or links as needed. Customize field properties and section settings to suit user needs, then save and assign the layout to specific profiles or record types. Finally, preview and test the layout to ensure it is functional and meets user requirements.

► **Task 4 : Creation of a Lightning App :**

- An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar
 - To create a lightning app page:
1. Go to setup page --> search “app manager” in quick find --> select “app manager” --> click on New lightning App.



- 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.

- To Add Navigation Items:

- Select the items (Our Customers,Consultants,Retailers,Others,Reports,Dashboards) from the search bar and move it using the arrow button --> Next.
- To Add User Profiles:

- Search profiles (System administrator) in the search bar --> click on the arrow button --> save & finish.

► **Task 5: Creating Profiles :**

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

Creating a Profiles: Now create a Store Supervisor profile and set its object permissions.

Creating a Profiles:

Now create a Store Supervisor profile and set its object permissions.

- From Setup enter Profiles in the Quick Find box, and select Profiles.
- From the list of profiles, find Standard User.
- Click Clone.
- For Profile Name, enter Store Supervisor.
- Click Save.
- While still on the Store Supervisor profile page, then click Edit.
- Scroll down to Custom Object Permissions and give access for Create,Read,Edit,Delete,View all and modify all for Our Customers,Consultants,Retailers,Others.
- Scroll down to Custom App Settings and give access for Urban Color.

To create a new profile:

1. Go to setup --> type profiles in quick find box --> click on profiles --> clone the desired profile (standard user is preferable) --> enter profile name --> save.
2. While still on the profile page, then click Edit.

The screenshot shows the Salesforce Setup interface. On the left, the 'Setup' menu is open, and 'Profiles' is selected under the 'Users' section. The main content area displays the 'Store Supervisor' profile page. At the top, there's a 'SETUP Profiles' header. Below it, the profile name 'Store Supervisor' is shown. A description states: 'Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing the user's profile. If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record type available to users with this profile.' A list of permissions is displayed, including 'Login IP Ranges', 'Enabled Apex Class Access', 'Enabled Visualforce Page Access', 'Enabled External Data Source Access', 'Enabled External Credential Principal Access', 'Enabled Custom Metadata Type Access', 'Enabled Custom Setting Definitions Access', 'Enabled Service Presence Status Access', and 'Enabled Custom Permissions'. Below the permissions list, there's a 'Profile Detail' section with buttons for 'Edit', 'Clone', 'Delete', and 'View Users'. A table shows the profile details: Name (Store Supervisor), User License (Salesforce), and Description (Salesforce). A 'Custom Profile' checkbox is checked.

Profile Detail	
Name	Store Supervisor
User License	Salesforce
Description	Salesforce

Custom Profile ☒

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

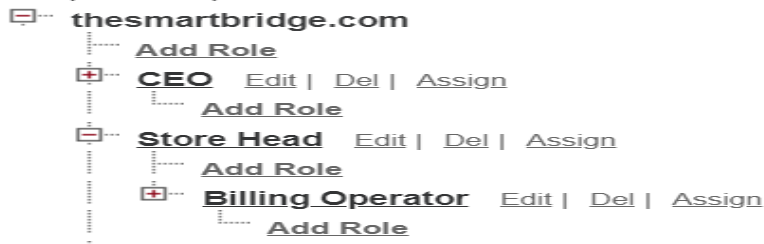
1. Click on the Gear Icon
 2. Click "Setup"
 3. In the Quick Find box, enter "Roles"
 4. Click "Roles"
 5. Click on "Set Up Roles"
 6. Click "Expand All"
 7. Under the CEO, click on "Add Role"
 8. Fill up the Label as Store Head, Role Name Store_Head.
 9. Enter a Role name that will be displayed on Reports
 10. Click on Save .
- Similarly create One Roles under Store Head as Billing Operator.

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'roles' and a navigation menu with 'Users', 'Roles' (highlighted), 'Feature Settings', 'Sales', 'Service', and 'Case Teams'. The main content area is titled 'Roles' and shows a 'New Role' form. The form fields are: Label (Store Head), Role Name (Store_Head), This role reports to (thesmartbridge.com), and Role Name as displayed on reports (empty). Buttons at the bottom are 'Save', 'Save & New', and 'Cancel'.

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'roles' and a navigation menu with 'Users', 'Roles' (highlighted), 'Feature Settings', 'Sales', 'Service', and 'Case Teams'. The main content area is titled 'Roles' and shows a 'New Role' form. The form fields are: Label (Billing Operator), Role Name (Billing_Operator), This role reports to (Store Head), and Role Name as displayed on reports (empty). Buttons at the bottom are 'Save', 'Save & New', and 'Cancel'.

Your Organization's Role Hierarchy

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



- In Salesforce, roles define the hierarchy and access levels for users within an organization. Roles determine the visibility of records and data sharing based on an employee's position and responsibilities. By establishing a role hierarchy, Salesforce allows users to access and manage records owned by users in roles below them in the hierarchy. This ensures that managers can oversee the work of their subordinates while maintaining data security and privacy. Roles are crucial for configuring access controls, enabling effective data sharing, and facilitating proper reporting within Salesforce.

► **Task 7 : Creation of an User :**

- In Salesforce, a user represents an individual who has access to the Salesforce platform and its functionalities. Each user is assigned a unique username, and their access level and permissions are defined by their profile and role within the organization. Users can perform tasks such as managing records, running reports, and collaborating with team members based on their assigned permissions. Salesforce administrators configure user settings, including login credentials, security settings, and access to various features and data, ensuring that users can efficiently and securely perform their job functions.
1. From Setup, in the Quick Find box, enter Users, and then select Users.
 2. Click New User.
 3. Enter the user's name Amar K and (Your) email address and a unique username in the form of an email address. By default, the username is the same as the email address.
 4. Select a Role(Store Head)
 5. Select a User Licence As Salesforce.
 6. Select a profile as Store Supervisor.
 7. Check Generate new password and notify the user immediately to have the user's login name and a temporary password emailed to your email.

Fill in the fields (first name, last name, alias, email id, username, nick name, role, user licence, profiles) --> save.

The image displays two screenshots of the Salesforce Setup interface, specifically the 'Users' section.

Top Screenshot: User Edit Form

- Navigation:** Setup > Home > Object Manager > Users
- Search:** use
- Left Sidebar:** Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Users, Feature Settings, Data.com, Prospector Users, Process Automation, Paused And Failed Flow.
- User Edit Form:**
 - Buttons:** Save, Save & New, Cancel
 - General Information:**
 - First Name: Amar
 - Last Name: k
 - Alias: ak
 - Email: mailid@gmail.com
 - Username: amark2133@salesforce.coi
 - Nickname: User167161323313747430
 - Title: Store Supervisor
 - Company:
 - Department:
 - Division:
 - Role and License:**
 - Role: Store Head
 - User License: Salesforce
 - Profile: Store Supervisor
 - Active:** ☒
 - User Roles:**
 - Marketing User: ☐
 - Offline User: ☐
 - Knowledge User: ☐
 - Flow User: ☐
 - Service Cloud User: ☐
 - Site.com Contributor User: ☐
 - Site.com Publisher User: ☐
 - WDC User: ☐
 - Data.com User Type: --None--

Bottom Screenshot: Single Sign On Information Form

- Navigation:** Setup > Home > Object Manager > Users
- Search:** use
- Left Sidebar:** Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Users, Feature Settings, Data.com, Prospector Users, Process Automation, Paused And Failed Flow.
- Single Sign On Information Form:**
 - Buttons:** Save, Save & New, Cancel
 - Single Sign On Information:**
 - Federation ID:
 - Locale Settings:**
 - Time Zone: (GMT-07:00) Pacific Daylight Time (America/Los_Angeles)
 - Locale: English (United States)
 - Language: English
 - Approver Settings:**
 - Delegated Approver:
 - Manager:
 - Receive Approval Request Emails: Only if I am an approver
 - ☐ Generate new password and notify user immediately

Task 8 : Creating/Modifying Records :

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

Steps to Create a Record:

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

new record in Salesforce.

Steps to Modify a Record:

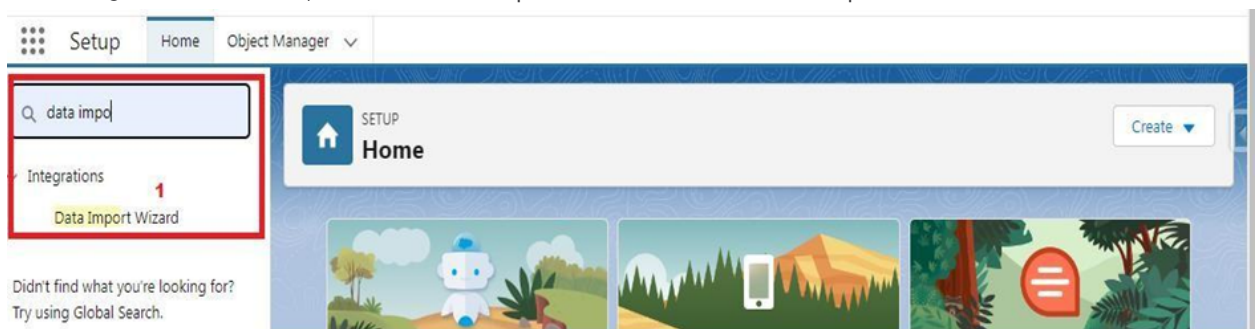
1. **Find the Record:**
 - Locate the record you want to modify by using the object's list view, search function, or related lists.
2. **Open the Record:**
 - Click on the record's name to open it and view its details.
3. **Click "Edit":**
 - In the record's detail view, click the "Edit" button to enable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

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

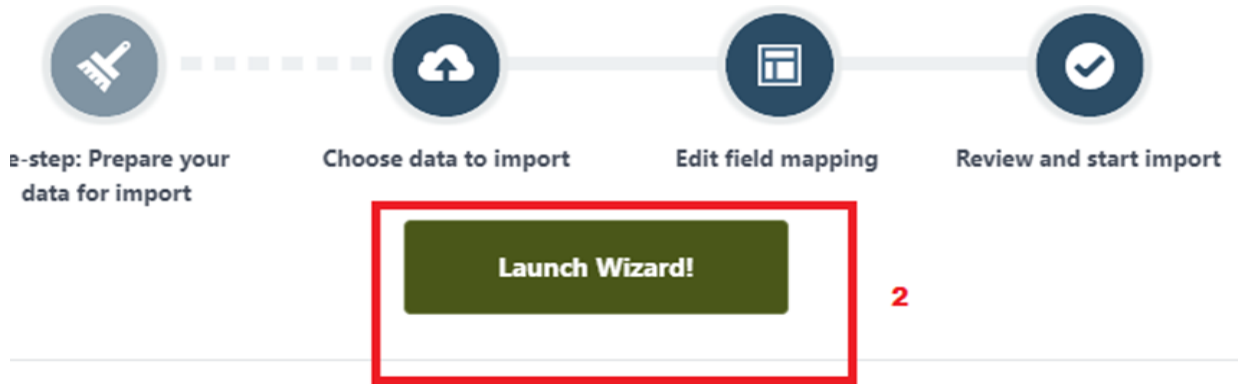
► **Task 9: Importing Data :**

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

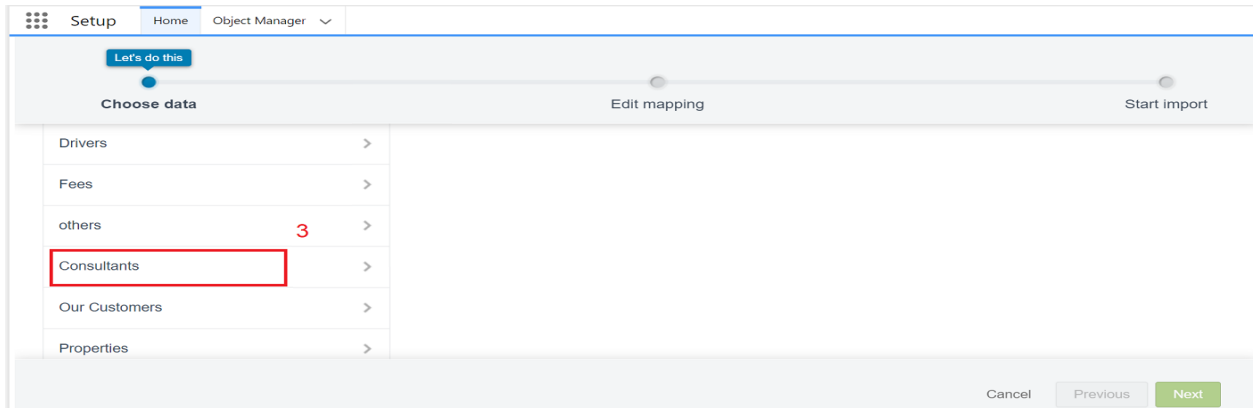
1. From Setup, click the Home tab.
2. In the Quick Find box, enter Data Import and select Data Import Wizard



3. Click Launch Wizard!



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



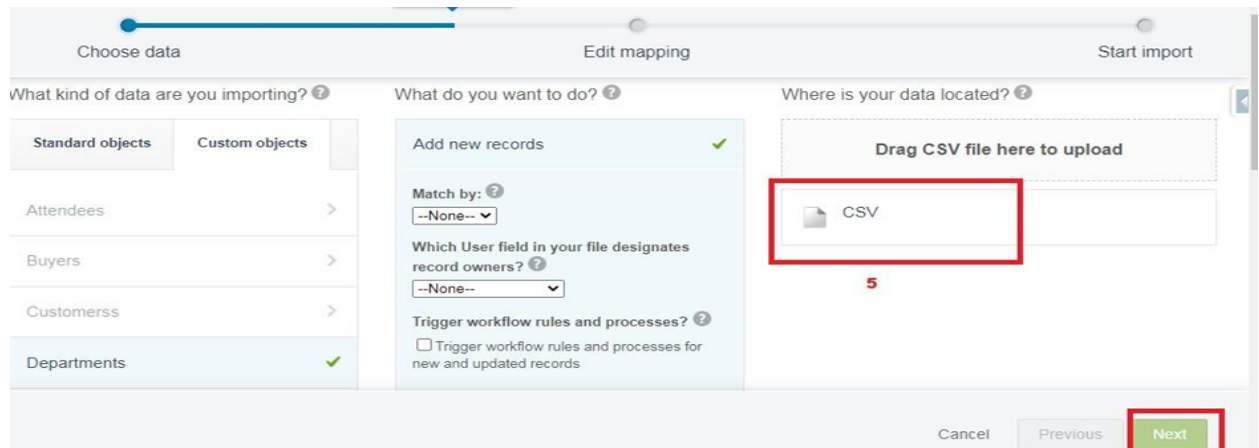
5. Select Add new records.

Import your Data into Salesforce

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



6. Click CSV and choose file Consultant_CSV which we made earlier. Click Next.



- Setup

Home

Object Manager

Almost done

Choose data

Edit mapping

Start import

Edit Field Mapping: Consultants

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

Edit

Mapped Salesforce Object

CSV Header

Example

Example

Example

Change

Consultant Name

Consultant Name

Dev Raj

Ajith

Babu

Change

Mobile Number

Mobile Number

984638732

90263943673

902639439

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

- Choose data

Edit mapping

Start import

Review & Start Import

Review your import information and click Start Import.

Your selections:

Consultants ✓

Add new records ✓

Consultants - Sheet1 (2).csv ✓

Your import **will include:**

Mapped fields

7

Your import **will not include:**

Unmapped fields

0

Help for this page

Cancel

Previous

Start Import

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

- | Batches | | | | | | | | | | | | |
|------------------------------|-----------------------------|---------------|---------------------|---------------------|----------------------------|---------------------------------|---------------------------|-------------------|----------------|-------------|---------------|-----------|
| View Request | View Result | Batch ID | Start Time | End Time | Total Processing Time (ms) | API Active Processing Time (ms) | Apex Processing Time (ms) | Records Processed | Records Failed | Retry Count | State Message | Status |
| View Request | View Result | 7512w0000Xqqr | 6/19/2023, 11:05 PM | 6/19/2023, 11:05 PM | 103 | 52 | 0 | 9 | 0 | 0 | | Completed |

- Note** - Do Field mapping carefully.

Creating Report :

Click App Launcher

2.Select Urban Color App

3.Click reports tab

4.Click New Report.

5.Click the report type as Consultants Click Start report.

6.Customize your report, in Columns select - ConsultantName,Delivery type,Products,Payment.

7.Click on the drop down option on the payment column and select Bucket this column.

8.Bucket Name as Payment type

9.Click on Add Bucket and name it as NetBanking

10.Click on Add Bucket and name it as Cash

11.Now Click on All Values and select Credit card,Debit card,Upi and Move to Net Banking.

12.Now Click on All Values again and select Cash and Move to Cash.

13.Click on Apply.

The screenshot displays the Salesforce Setup interface. At the top, the 'Setup' tab is selected, and the 'Urban Color' app is highlighted in the left sidebar. The main content area shows the 'Home' page with various tiles for 'Get Started with Einstein Bots', 'Mobile Publisher', and 'Real-time Collaborative Docs'. Below these, there is a 'Most Recently Used' section with a table of items.

The bottom section of the screenshot shows the 'Reports' tab selected in the top navigation bar. The 'Reports' page displays a 'Recent' section with a table of reports. The table has columns for 'Report Name', 'Description', 'Folder', 'Created By', 'Created On', and 'Subscribed'. A 'New Report' button is visible in the top right corner of the 'Recent' section.

Report Name	Description	Folder	Created By	Created On	Subscribed
Customer Details					
Custom Field Definition					
Consultant					

REPORT ▾
New Consultants Report

Consultants

↶ ↷ Add Chart Save & Run Save Close Run

Update Preview Automatically

Outline Filters

Groups

Columns

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

	Consultant: Consultant Name ▾	Delivery Type ▾	Products ▾	Payment ▾
1	Dev Raj	Self Pickup	Lipstick	Cash
2	Ajith	Courier	Compact	Upi
3	Babu	Self Pickup	Face Pack	Credit Card
4	Chitra	Courier	Eye Liner	Debit Card
5	Swathi	Courier	Nail Polish	Upi
6	Prasad	Self Pickup	Eye Liner	Upi
7	Ajay Kumar	Courier	Lip Balm	Debit Card
8	Shankar	Self Pickup	Face Pack	Cash
9	Sandeep	Courier	Eye Liner	Upi

REPORT ▾
New Consultants Report

Consultants

↶ ↷ Add Chart Save & Run Save Close

Update Preview Automatically

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Columns

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

	Consultant: Consultant Name ▾	Delivery Type ▾	Products ▾	Payment ▾
1	Dev Raj	Self Pickup	Lipstick	Cash
2	Ajith	Courier	Compact	Upi
3	Babu	Self Pickup	Face Pack	Credit Card
4	Chitra	Courier	Eye Liner	Debit Card
5	Swathi	Courier	Nail Polish	Upi
6	Prasad	Self Pickup	Eye Liner	Upi
7	Ajay Kumar	Courier	Lip Balm	Debit Card
8	Shankar	Self Pickup	Face Pack	Cash
9	Sandeep	Courier	Eye Liner	Upi

1

Sort Ascending
Sort Descending
Group Rows by This Field
Group Columns by This Field
Bucket This Column
Show Unique Count
Move Left
Move Right
Remove Column

2

Edit Bucket Column

* Field

Payment

* Bucket Name

Payment type

All Values (4)

Unbucketed Values (4)

Search Values

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

☐ Bucket remaining values as Other

Add Bucket

Move To ▾

Cancel

Apply

Edit Bucket Column

* Field

Payment

×

* Bucket Name

Payment type

All Values (4)

Bucket Name

Unbucketed Values (4)

Bucket remaining values as Other

Add Bucket

Search Values

Q

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

Move To

Cancel

Apply

Edit Bucket Column

* Field

Payment

×

* Bucket Name

Payment type

All Values (4)

Net Banking (0)

Cash (0)

Unbucketed Values (4)

Bucket remaining values as Other

Add Bucket

Search Values

Q

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

Move To

Cancel

Apply

Edit Bucket Column

* Field

Payment

×

* Bucket Name

Payment type

All Values (4)

Net Banking (0)

Cash (0)

Unbucketed Values (4)

Bucket remaining values as Other

Add Bucket

Search Values

Q

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

Move To

Cancel

Apply

Edit Bucket Column

* Field

Payment

×

* Bucket Name

Payment type

All Values (4)

Net Banking (0)

Cash (0)

Unbucketed Values (4)

Net Banking

Cash

Unbucketed Values

New Bucket

Bucket remaining values as Other

Add Bucket

Search Values

VALUE

BUCKET

Credit Card

Debit Card

Move To

Cancel

Apply

Edit Bucket Column

* Field

Payment

×

* Bucket Name

Payment type

All Values (4)

Net Banking (3)

Cash (0)

Unbucketed Values (1)

Cash

Bucket remaining values as Other

Add Bucket

Search Values

VALUE

BUCKET

Credit Card

Debit Card

UPI

Cash

Move To

Cancel

Apply

Edit Bucket Column

* Field

Payment ×

* Bucket Name

Payment type

All Values (4)

Net Banking (3)

Cash (1)

Unbucketed Values (0)

☐ Bucket remaining values as Other

Add Bucket

Search Values

VALUE	BUCKET
Cash	Cash

Move To ▼

Cancel

Apply

14.In Group Rows Add Payment Type Bucket Field.

15.Click refresh

16.Click Save and Run

17.Give report name – Consultant report

18.Click Save

REPORT ▼

New Consultants Report ✓

Consultants

Outline

Filters

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

	Consultant: Consultant Name	Delivery Type	Products	Payment	Payment type
1	Dev Raj	Self Pickup	Lipstick	Cash	Cash
2	Ajith	Courier	Compact	UPI	Net Banking
3	Babu	Self Pickup	Face Pack	Credit Card	Net Banking
4	Chitra	Courier	Eye Liner	Debit Card	Net Banking
5	Swathi	Courier	Nail Polish	UPI	Net Banking
6	Prasad	Self Pickup	Eye Liner	UPI	Net Banking
7	Ajay Kumar	Courier	Lip Balm	Debit Card	Net Banking
8	Shankar	Self Pickup	Face Pack	Cash	Cash
9	Sandeep	Courier	Eye Liner	UPI	Net Banking

REPORT

New Consultants Report

Consultants

Outline

Filters

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

Fields >

Groups

GROUP ROWS

Add group...

Payment type

GROUP COLUMNS

Add group...

Columns

Add column...

Consultant: Consultant Name

Delivery Type

Products

Payment

Payment type

Consultant: Consultant Name

Delivery Type

Products

Payment

Net Banking (7)	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)				

Save Report

*Report Name

Consultants Report

Report Unique Name

Consultants_Report_hvb

Report Description

Folder

Private Reports

Select Folder

Cancel

Save

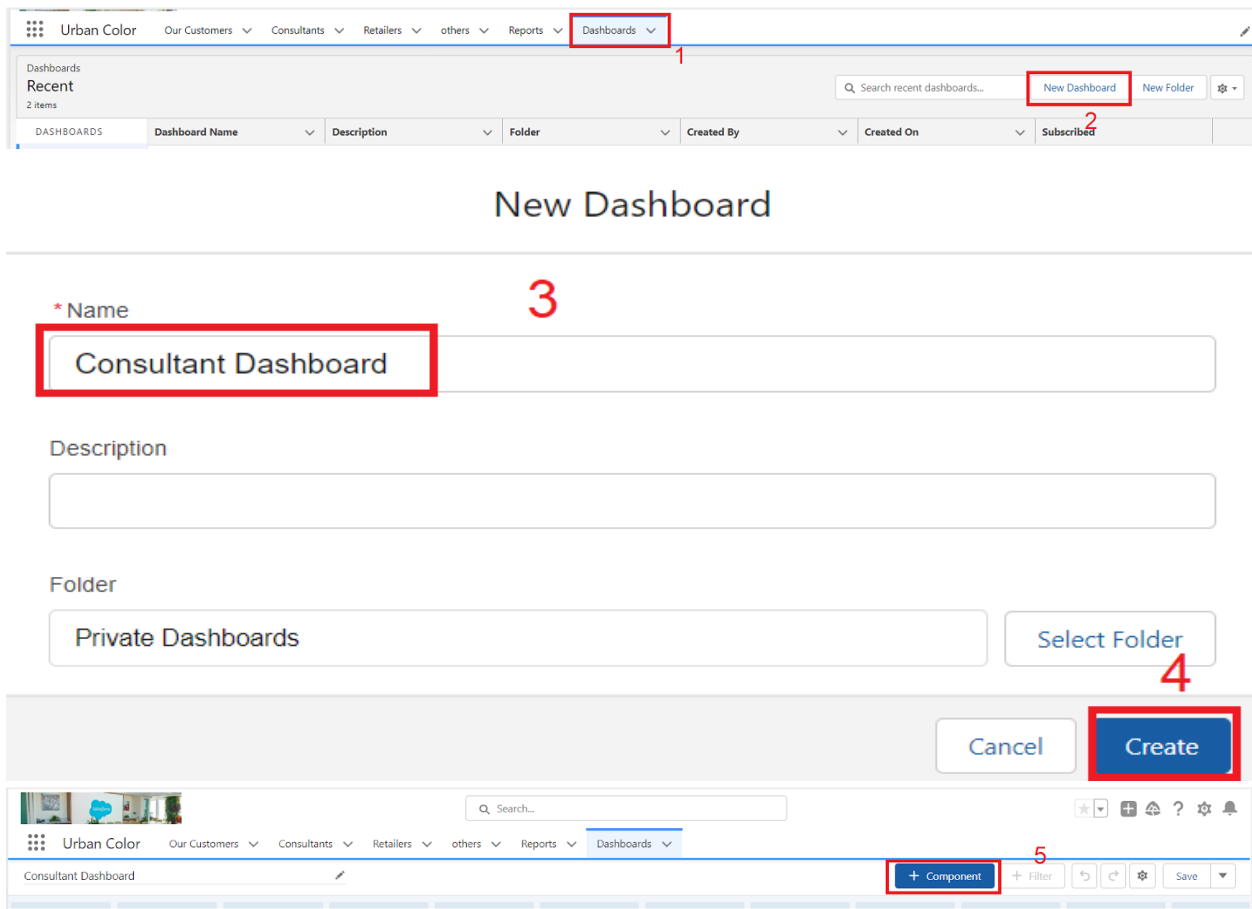
View Reports :

1. Click on App Launcher on the left side of the screen.
2. Search Urban Color App & click on it.
3. Click on Reports Tab.
4. Click on Urban Color Report and see records

Task 11 : Working with dashboards :

Create Dashboard :

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



Urban Color Our Customers Consultants Retailers others Reports Dashboards

Dashboards Recent 2 items

Search recent dashboards... New Dashboard New Folder

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
------------	----------------	-------------	--------	------------	------------	------------

New Dashboard

* Name 3

Consultant Dashboard

Description

Folder

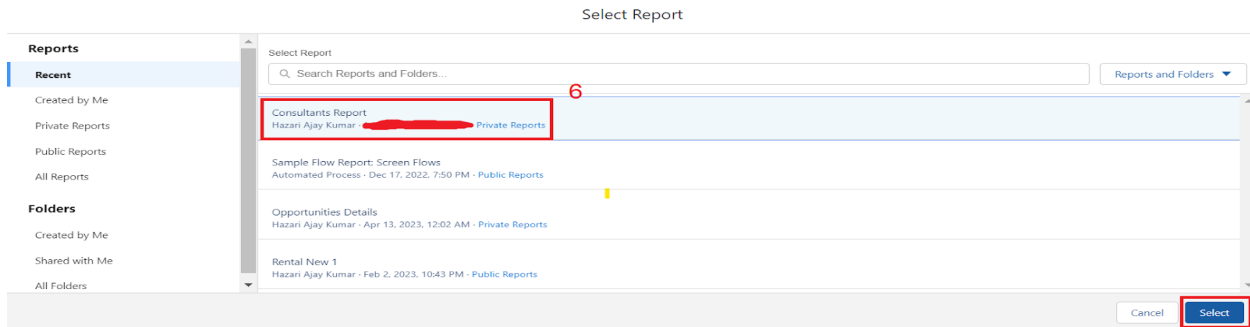
Private Dashboards Select Folder 4

Cancel Create

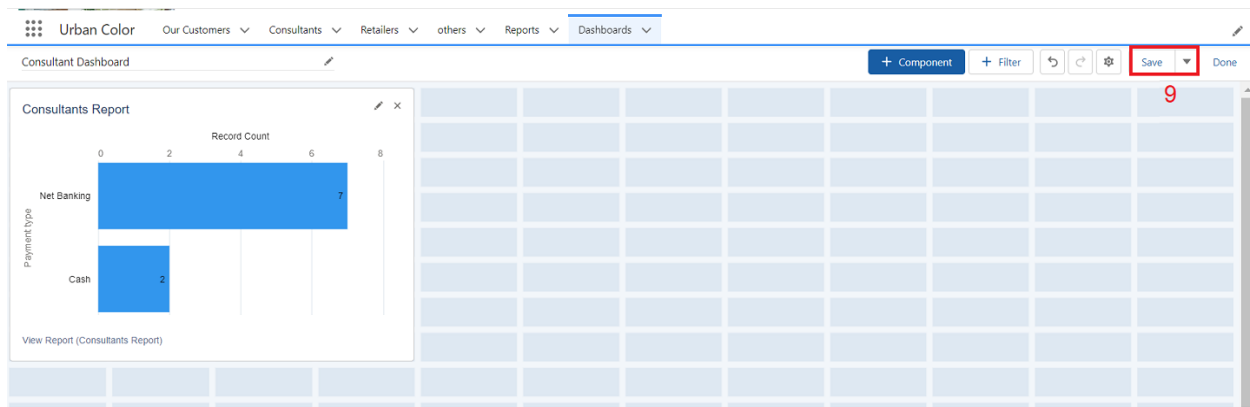
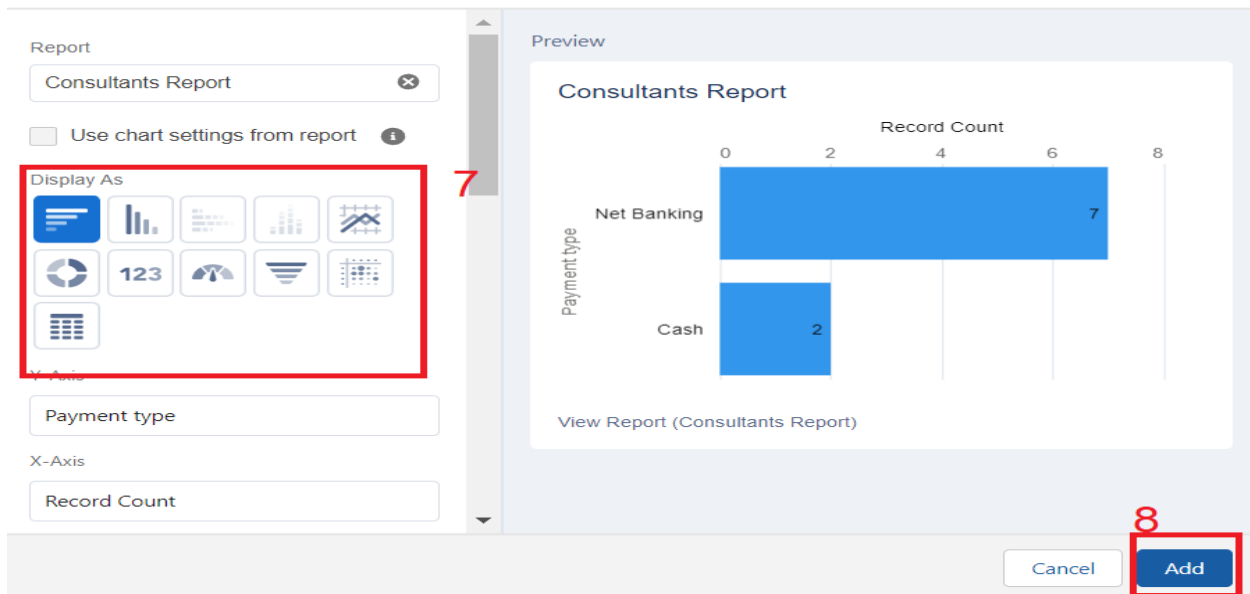
Urban Color Our Customers Consultants Retailers others Reports Dashboards

Consultant Dashboard

+ Component 5 + Filter Save



Add Component



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

1

Setup

Home

Object Manager

Q. ur

2

Apps

Urban Color

Items

Asset Action Sources

Data Use Purpose

Operating Hours

Our Customers

Return Orders

View More

Optimizer

ADMINISTRATION

Users

Data

Email

PLATFORM TOOLS

Subscription Management

Apps

Feature Settings

home

Create

Get Started with Einstein Bots

Launch an AI-powered bot to automate your digital connections.

Get Started

Mobile Publisher

Use the Mobile Publisher to create your own branded mobile app.

Learn More

Real-time Collaborative Docs

Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.

Get Started

Most Recently Used

10 Items

NAME	TYPE	OBJECT
Customer Details	Custom Field Definition	Consultant

Urban Color

Our Customers

Consultants

Retailers

others

Reports

3

Dashboards

Dashboards

Recent

3 items

Search recent dashboards...

New Dashboard

New Folder

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

FOLDERS