

# Cosmetics Store Management

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## Abstract

Cosmetics Store Management in Salesforce is a comprehensive solution designed to empower cosmetics stores to manage their operations with unparalleled efficiency and effectiveness. Built on the robust Salesforce platform, this innovative solution provides a powerful and scalable foundation for streamlining customer relationships, sales, and inventory management.

By leveraging this cutting-edge technology, cosmetics stores can significantly improve their operational efficiency, enhance customer engagement, and drive business growth. The solution enables real-time visibility into sales performance, customer interactions, and inventory levels, allowing store owners to make data-driven decisions and stay ahead of the competition.

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# Cosmetics Store Management

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

## Creation Salesforce Org

### **Introduction**

Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don't know where you should start on your learning journey? If you've answered yes to any of these questions, then you're in the right place. This module is for you.

Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module, we'll take you through these features and answer the question, "What is Salesforce, anyway?"

### **What Is Salesforce?**

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this:

<https://youtu.be/r9EX3lGde5k>

## Object

Salesforce objects are database tables that permit you to store data that is specific to an organisation. Salesforce objects are of two types: Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.

Custom objects:Our Customers,Consultants,Retailers,Others.

## To Create an object:

To Create an object:

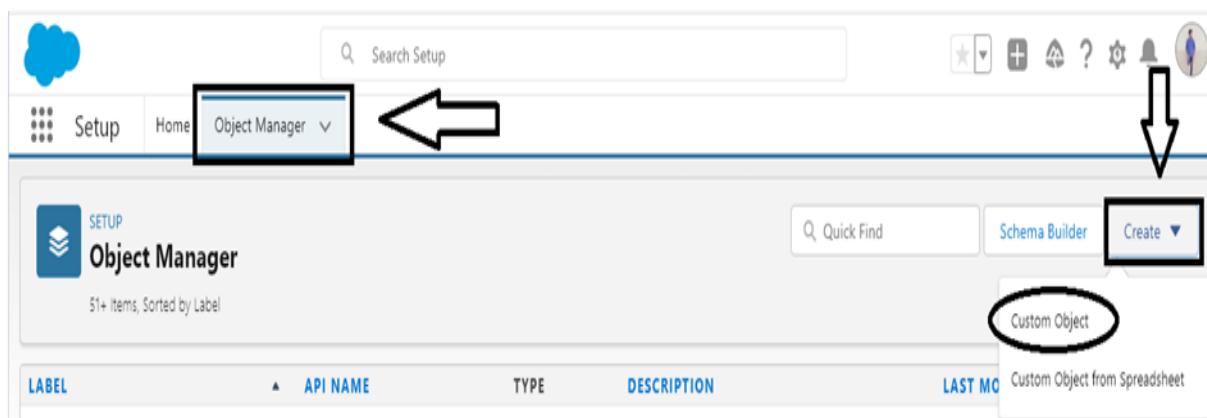
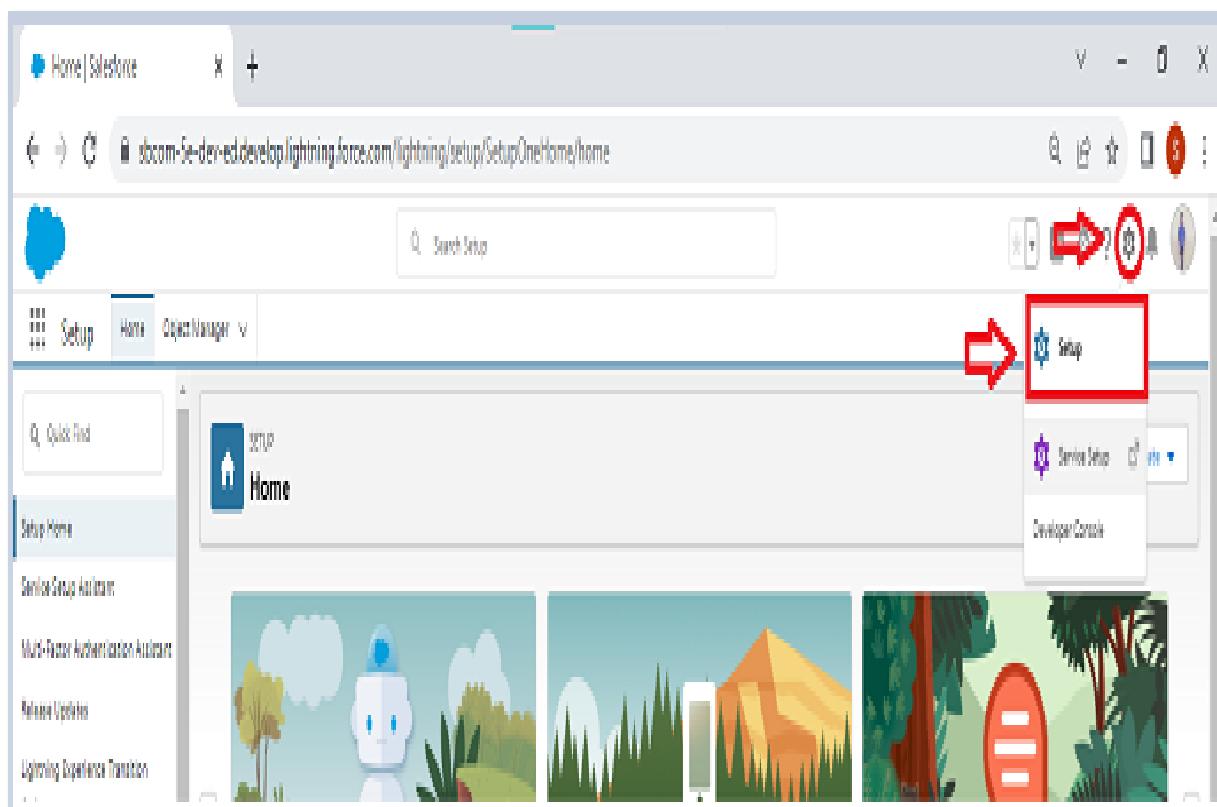
Creation of Objects for Urban Color, For this Urban Color we need to create 3 objects i.e., Our Customers, Consultants, Retailers, others.

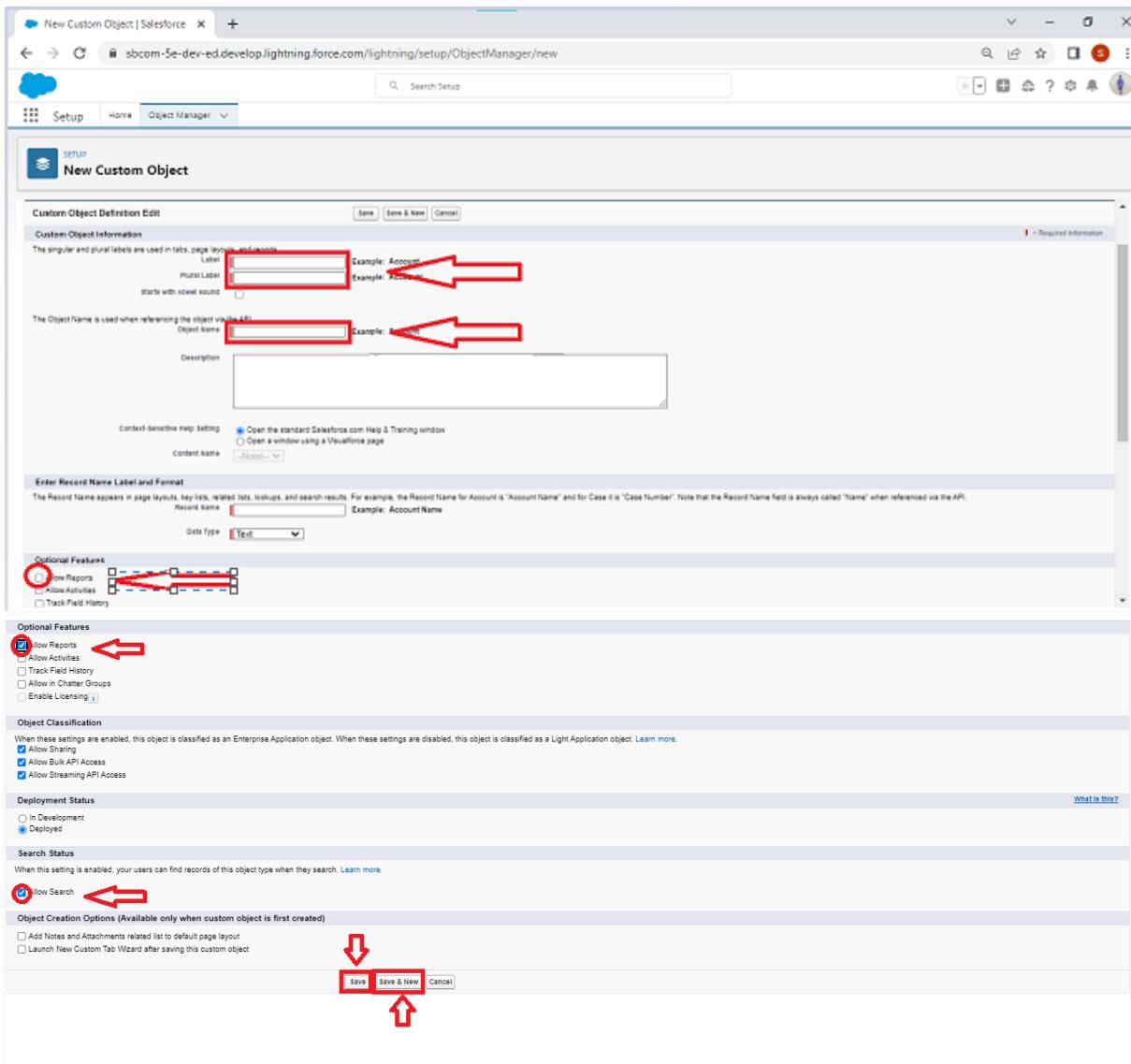
The below steps will assist you in creating those objects.

- 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.





## Retailers object creation

To Create an object:

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 Retailer Object

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

- Label: Retailer

- Plural Label: Retailers
- Record Name: Retailers
- 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 Retailers.
- For Tab Style, select any icon.
- Leave all defaults as is. Click Next, Next, and Save.

## **Others Object Creation**

To Create an object:

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 others Object

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

- Label: other
- Plural Label: others
- Record Name: others
- 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 others.
- For Tab Style, select any icon.
- Leave all defaults as is. Click Next, Next, and Save.

## **Fields in Our Customers objects**

Fields in Our Customers objects follow below data types:

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

## Fields in Consultants objects

Fields in Consultants objects follow below data types:

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

## Fields in Retailers objects

Fields in Retailers objects follow below data types:

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

	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

## 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.

## Page Layout Creation

- From the Salesforce setup menu, go to "Object Manager" and select the Consultants object.
- Click on "Page Layouts" in the left sidebar. This will display a list of available page layouts for the selected object.
- Select the Consultant Layout page layout.

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

5. Click on Save

# The Lightning App

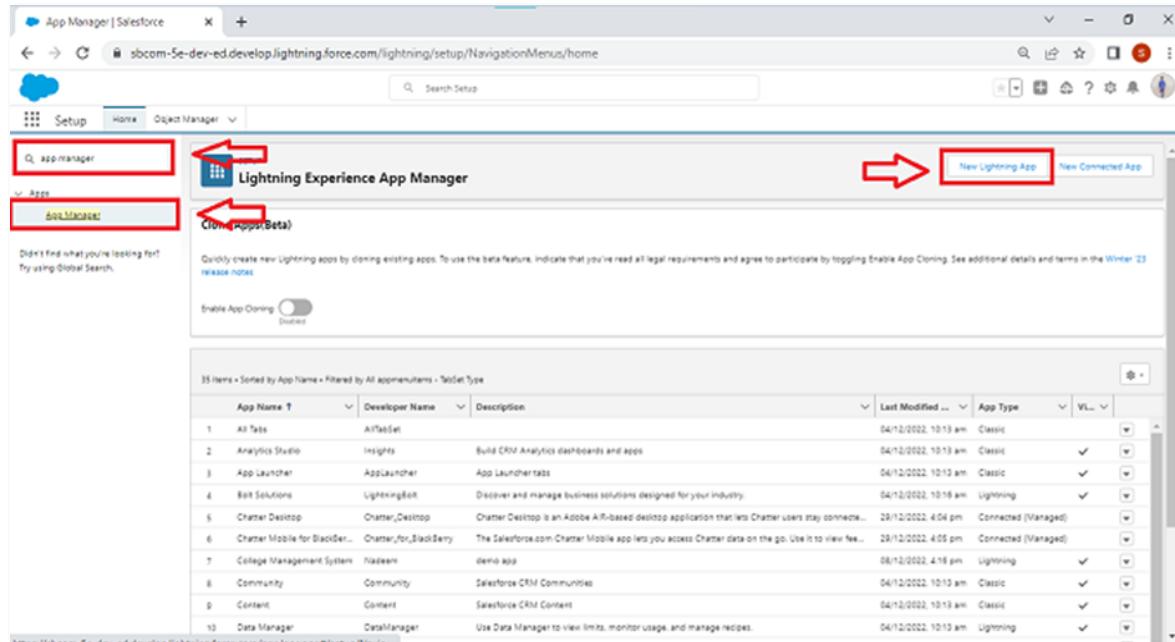
An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

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.

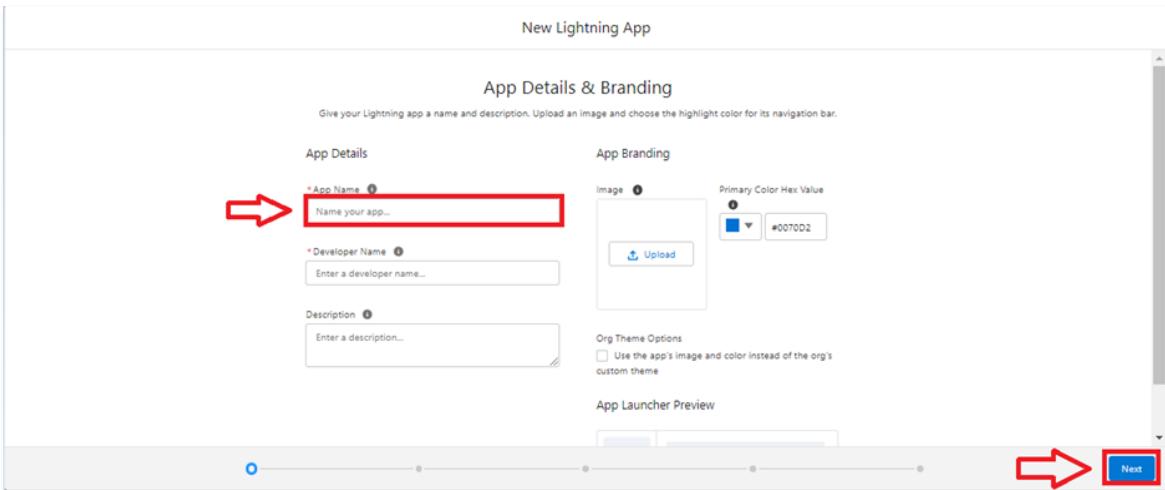
## Create a Lightning App

To create a lightning app page:

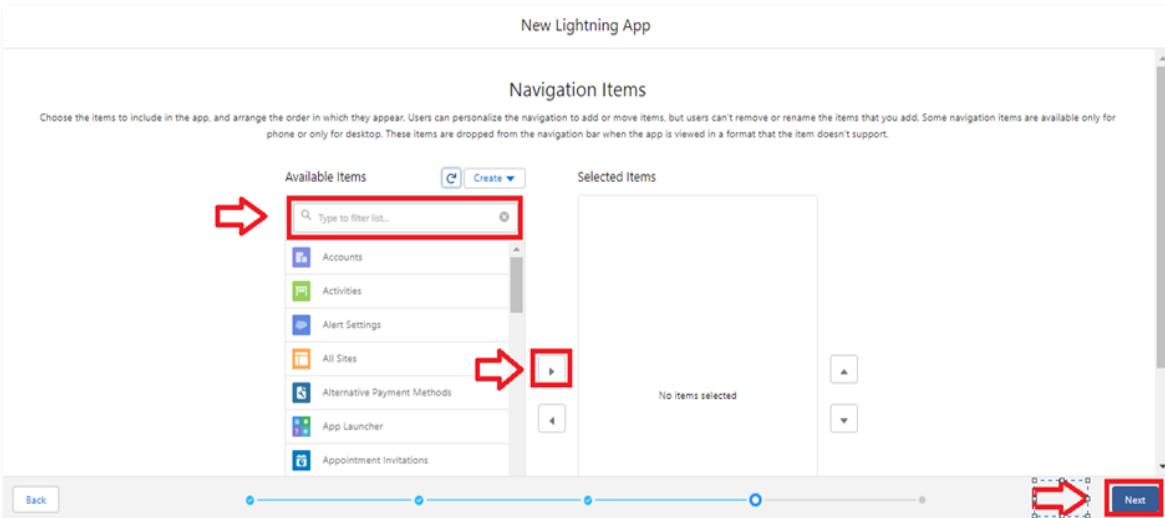
1. Go to setup page --> search “app manager” in quick find --> select “app manager” --> click on New lightning App.



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.

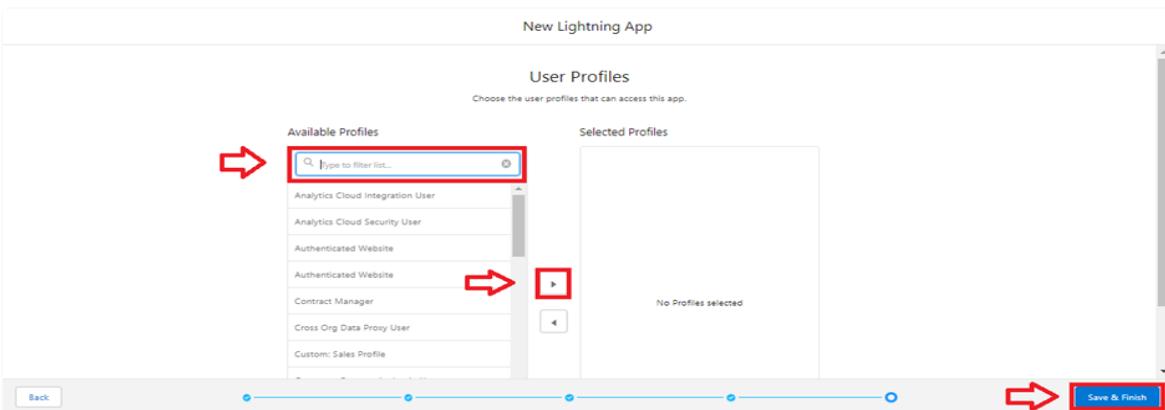


3. To Add Navigation Items:



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.

# 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.

## Creating a Profiles

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.

The screenshot shows the Salesforce Setup interface. On the left, there's a navigation bar with 'Setup' selected. Below it, a search bar contains 'prof'. Under 'Users', 'Profiles' is highlighted. A message says 'Didn't find what you're looking for? Try using Global Search.' The main area is titled 'Profiles' and shows a 'Clone Profile' form. It has a note 'Enter the name of the new profile.' and a required field 'You must select an existing profile to clone from.' with 'Standard User' selected. The 'Profile Name' field contains 'Store Supervisor'. At the bottom are 'Save' and 'Cancel' buttons.

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

The screenshot shows the Salesforce Setup interface with the following details:

**Top Navigation:** Home, Object Manager

**Search Bar:** profi

**Left Sidebar:** Users, Profiles (selected)

**Profile Page:**

- Profile Name:** Store Supervisor
- Description:** Users with this profile have the permissions and page layouts listed below.
- Permissions:** 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].
- Profile Detail:** Name: Store Supervisor, User License: Salesforce, Description: (standard\_\_LightningUI), Custom Profile: checked.
- Service Provider Access:** A grid of checkboxes for various service providers.
- Tab Settings:** Overwrite users' personal tab customizations (checkbox).

3. Scroll down to the Custom object permission and give all access to the Consultants, Others, Our Customers, Retailers object.

The screenshot shows the 'Profiles' setup page under 'SETUP'. The 'Password Policies' section is active. Configuration includes:

- 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: Unchecked

Buttons at the bottom: Save, Save & New, Cancel.

4. Click on Save.
5. Similarly Create operator profile ,Clone Salesforce Platform user and give access only for Billing Operator.

The screenshot shows the 'Profiles' setup page under 'SETUP'. A modal dialog titled 'Clone Profile' is open. It displays the message: 'You must select an existing profile to clone from.' Fields shown are:

- Existing Profile: Standard Platform User
- User License: Salesforce Platform
- Profile Name: Billing Operator

Buttons at the bottom: Save, Cancel.

The screenshot shows the 'Profile Edit' screen for the 'Billing Operator' profile under 'SETUP'. The profile details are:

- Name: Billing Operator
- User License: Salesforce
- Description: (empty text area)
- Custom Profile: checked

Buttons at the bottom: Save, Save & New, Cancel.

The screenshot shows the 'Profiles' setup page under the 'SETUP' tab. The 'Allow Create for employees' checkbox is checked. The 'Password Policies' section is open, 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: (checkbox)
- Require a minimum 1 day password lifetime: (checkbox)
- Don't immediately expire links in forgot password emails: (checkbox)

At the bottom are 'Save', 'Save & New', and 'Cancel' buttons.

6.

7. Click On Save

## 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 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.

Setup Home Object Manager

roles

Users Roles Feature Settings Sales Service Case Teams

Contact Roles on Contracts Contact Roles on Opportunities Case Team Roles Contact Roles on Cases

Role Edit New Role

Role Edit

Label: Store Head  
Role Name: Store\_Head  
This role reports to: thesmartbridge.com  
Role Name as displayed on reports:

Save Save & New Cancel

Setup Home Object Manager

roles

Users Roles Feature Settings Sales Service Case Teams

Contact Roles on Contracts Contact Roles on Opportunities Case Team Roles Contact Roles on Cases

Role Edit New Role

Role Edit

Label: Billing Operator  
Role Name: Billing\_Operator  
This role reports to: Store Head  
Role Name as displayed on reports:

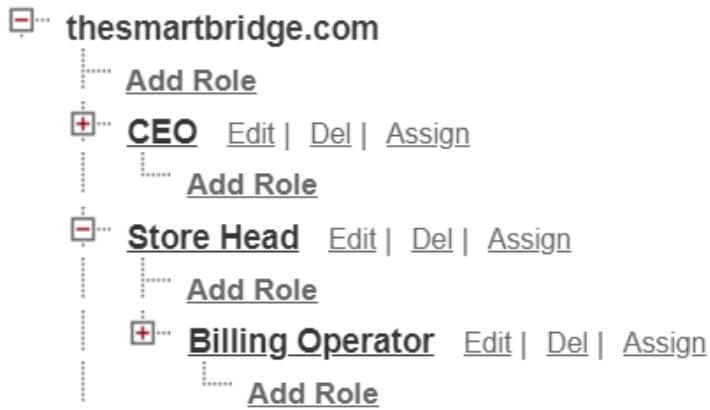
Save Save & New Cancel

Help for this Page ?

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

## 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.

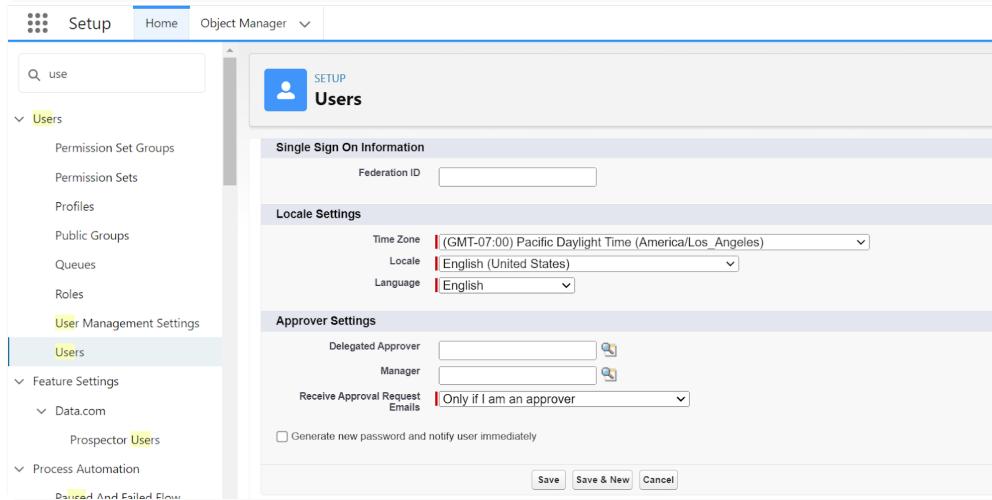
## Creating a User:

1. From Setup, in the Quick Find box, enter Users, and then select Users.
2. Click New User.
3. Enter the user's name 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 screenshot shows the Salesforce Setup interface with the 'User Edit' screen open. The left sidebar is collapsed, and the main area displays the 'User Edit' form under the 'General Information' tab. The form fields are as follows:

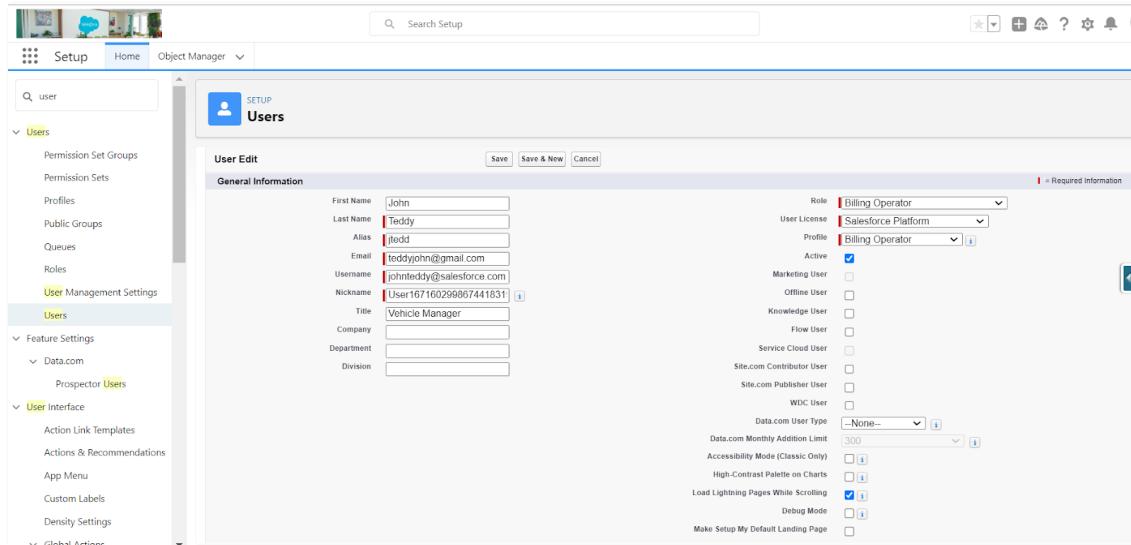
Field	Value
First Name	Amar
Last Name	K
Alias	sk
Email	mailid@gmail.com
Username	amarik2133@salesforce.com
Nickname	User167161323313747430
Title	Store Supervisor
Company	(empty)
Department	(empty)
Division	(empty)
Role	Store Head
User License	Salesforce
Profile	Store Supervisor
Active	<input checked="" type="checkbox"/>
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>
Site.com Publisher User	<input type="checkbox"/>
WDC User	<input type="checkbox"/>
Data.com User Type	--None--



## 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 John Teddy 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(Billing Operator)
5. Select a User Licence 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.

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



The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar and navigation sections for 'Users' (Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles), 'User Management Settings' (selected), 'Users' (Feature Settings for Data.com and Prospector Users, Process Automation, Paused And Failed Flow), and 'Prospectors'.

The main content area is titled 'SETUP Users'. It contains three tabs: '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), and 'Approver Settings' (Delegated Approver, Manager, Receive Approval Request Emails: Only if I am an approver, and a checkbox for Generate new password and notify user immediately). At the bottom are 'Save', 'Save & New', and 'Cancel' buttons.

## User Adoption

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

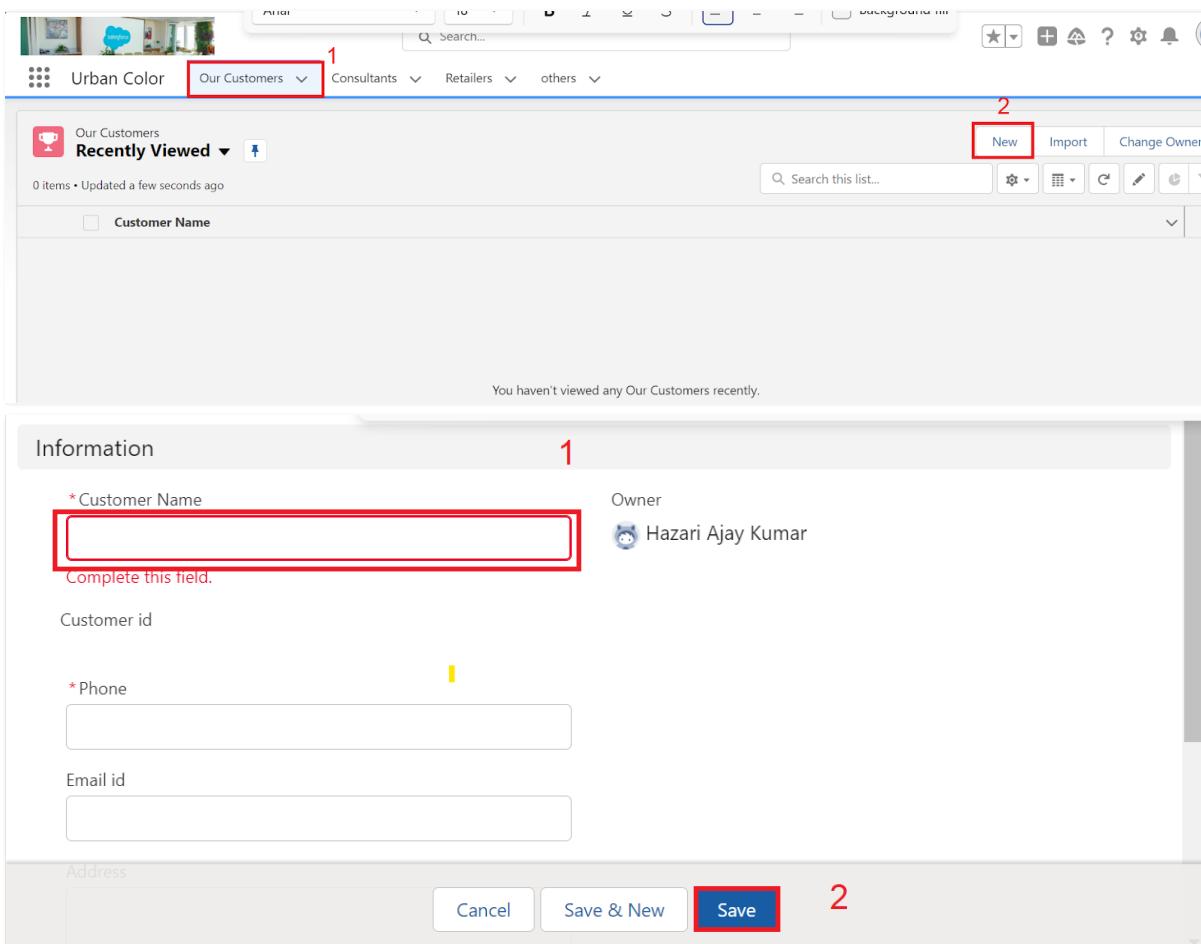
## Create Our Customer Record

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 the Salesforce Lightning Experience. The top navigation bar includes the App Launcher (with a red box labeled 1), the current app 'Urban Color' (with a red box labeled 2), and other tabs like 'Our Customers', 'Consultants', 'Retailers', and 'others'.

The main area is a list view for 'Our Customer' records. A search bar at the top left shows 'urban'. The left sidebar has sections for 'Apps' (with 'Urban Color' selected) and 'Items' (No results, View All).

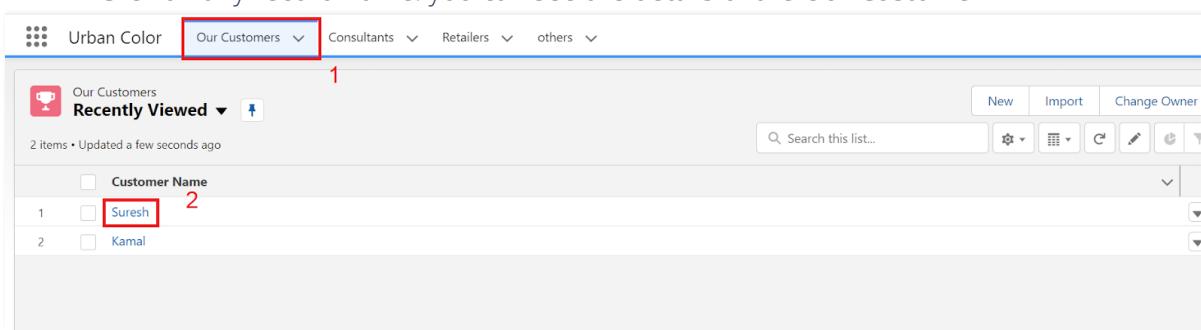
At the top right, there are buttons for 'New', 'Import', and 'Change Owner'. Below the list, there are standard table controls for sorting and filtering.



## View Record (Our Customer)

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



Our Customer  
**Suresh**

Related	<b>Details</b>
Customer Name	Suresh
Customer id	5
Phone	97583873728
Email id	suresh@gmail.com
Address	Hyderabad
Additional Information	Customer

## Delete Record (Our Customer)

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.

Our Customers  
Recently Viewed

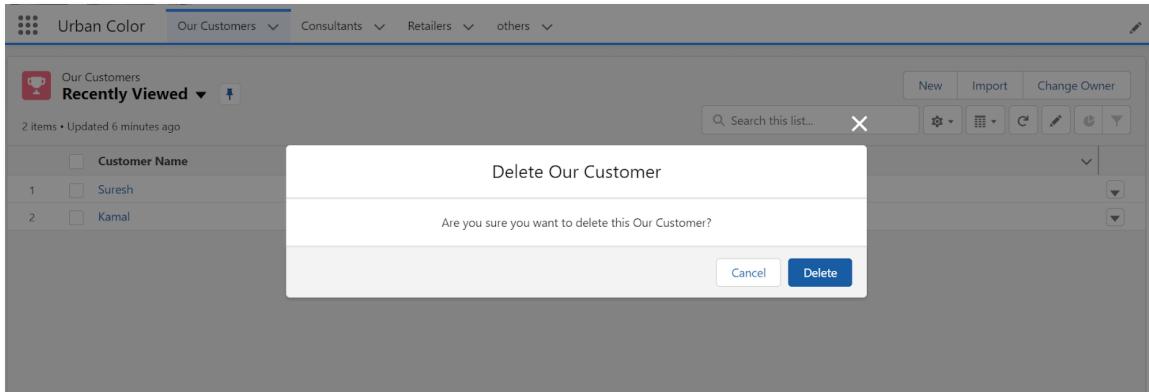
1

2 items • Updated 2 minutes ago

Customer Name
1 Suresh
2 Kamal

2

3

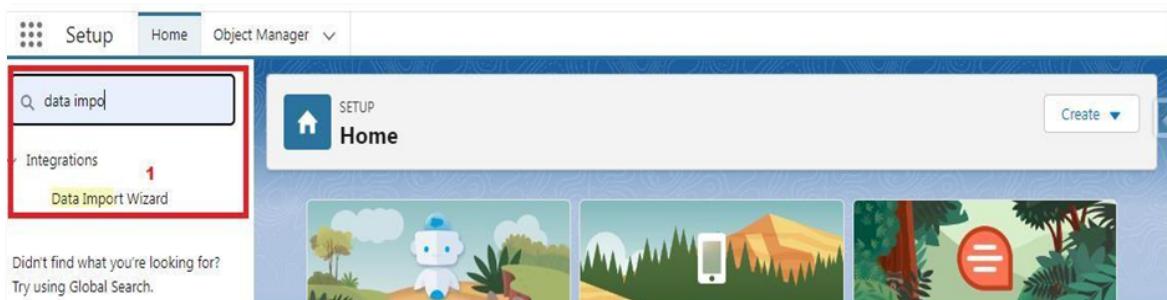


## Import Data

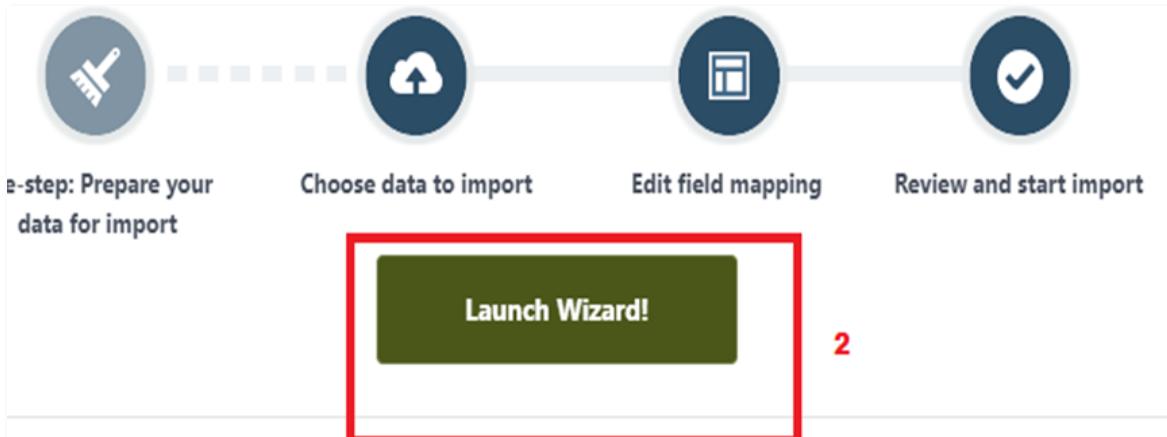
Data Import Wizard—this tool, accessible through the Setup menu, lets you import data in common standard objects, such as contacts, leads, accounts, as well as data in custom objects.

### To Import Data

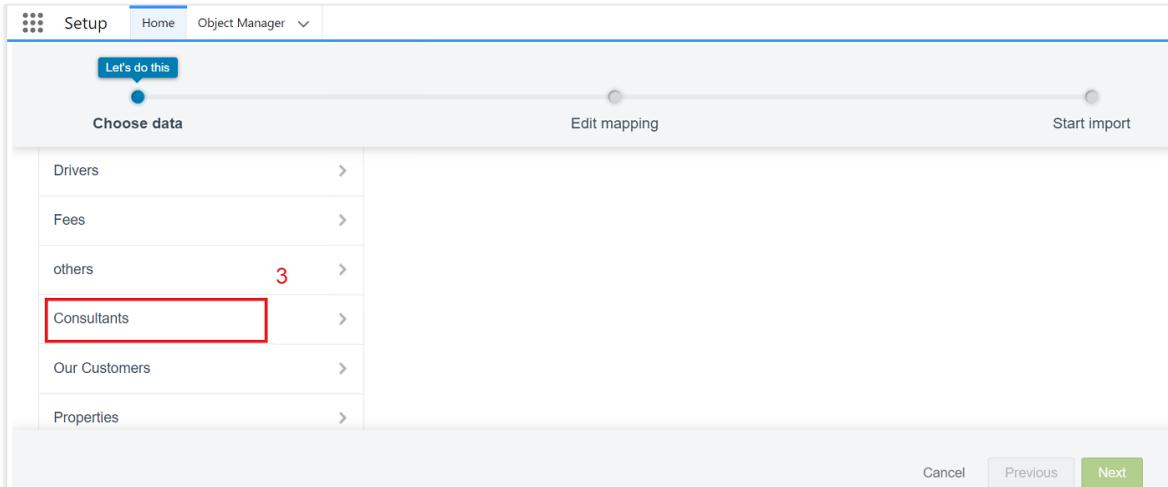
1. From Setup, click the Home tab.
2. In the Quick Find box, enter Data Import and select Data Import Wizard



3. Click Launch Wizard!



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



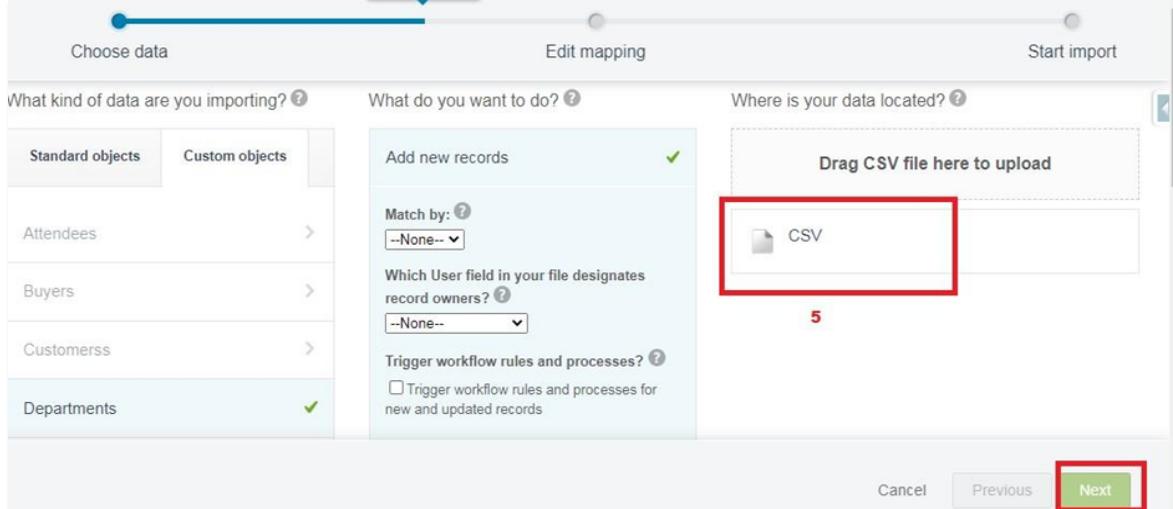
5. Select Add new records.

### Import your Data into Salesforce

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



6. Click CSV and choose file Consultant\_CS1 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.

The screenshot shows the 'Edit Field Mapping' step of the Data Import Wizard. At the top, there's a progress bar with 'Almost done' in the center. Below it, a table maps CSV headers to Salesforce fields. The 'Mapped Salesforce Object' column is highlighted with a red box. The 'Start import' button is located at the bottom right of the screen.

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	

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

The screenshot shows the 'Review & Start Import' step. It displays a summary of the import: 7 mapped fields and 0 unmapped fields. The 'Your selections' section is highlighted with a red box. The 'Start Import' button is located at the bottom right.

9. Click OK on the popup.

The screenshot shows a success message: 'Congratulations, your import has started! Click OK to view your import status on the Bulk Data Load Job page.' A large green 'OK' button is at the bottom right.

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

The screenshot shows the 'Batches' table. It contains one row with the following data:

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
<a href="#">View Request</a>	<a href="#">View Result</a>	7512w00000Xqrar	6/19/2023, 11:05 PM	6/19/2023, 11:05 PM	103	52	0	9	0	0	Completed	

11. Make sure you have 0 records under the records failed column.

**Note** - Do Field mapping carefully.

# What are Reports?

## **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 is 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.

## Create Report

1.Click App Launcher

2.Select Urban Color App

3.Click reports tab

4.Click New Report.

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

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

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

- 8.Bucket Name as Payment type
- 9.Click on Add Bucket and name it as NetBanking
- 10.Click on Add Bucket and name it as Cash
- 11.Now Click on All Values and select Credit card,Debit card,Upi and Move to Net Banking.
- 12.Now Click on All Values again and select Cash and Move to Cash.
- 13.Click on Apply.

The screenshot shows the Salesforce Setup Home page. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. On the left, a sidebar lists various setup categories like 'Data Use Purpose', 'Operating Hours', and 'Customer'. Under 'PLATFORM TOOLS', 'Apps' is selected, and 'Urban Color' is highlighted with a red box and labeled '2'. The main content area features three cards: 'Get Started with Einstein Bots', 'Mobile Publisher', and 'Real-time Collaborative Docs'. Below these is a section titled 'Most Recently Used' showing 'Customer Details' as a 'Custom Field Definition' object.

The screenshot shows the Salesforce Reports page for the 'Urban Color' account. The top navigation bar includes 'Reports', 'Recent', and 'Dashboards'. The 'Reports' tab is selected, indicated by a red box and labeled '1'. In the top right, there is a 'New Report' button highlighted with a red box and labeled '2'. The main content area displays a table of recent reports with columns for 'Report Name', 'Description', 'Folder', 'Created By', 'Created On', and 'Subscribed'.

The screenshot shows the Salesforce Report builder for the 'New Consultants Report'. The top navigation bar includes 'REPORT', 'New Consultants Report', and 'Consultants'. The 'Outline' tab is selected, indicated by a red box. The 'Columns' section on the left lists 'Consultant: Consultant Name', 'Delivery Type', 'Products', and 'Payment', each with a 'Remove' button. The main content area shows a preview of a report table with 9 rows of data:

	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

Fields > **Outline** Filters Previewing a limited number of records. Run the report to see everything.

Groups  GROUP ROWS Add group...

Columns  Add column...

Consultant: Consultant Name  Delivery Type  Products  Payment  1

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

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

Update Preview Automatical

### Edit Bucket Column

\*Field  \*Bucket Name

All Values (4)		Search Values	
		VALUE	BUCKET
<input type="checkbox"/>	Credit Card		
<input type="checkbox"/>	Debit Card		
<input type="checkbox"/>	Upi		
<input type="checkbox"/>	Cash		

Unbucketed Values (4)

Bucket remaining values as Other

Add Bucket  Move To

Cancel  Apply

### Edit Bucket Column

\* Field  \* Bucket Name

All Values (4)	Search Values
<input type="text" value="Bucket Name"/> 2	<input type="text" value="Search Values"/> <input type="button" value="X"/>
<b>Unbucketed Values (4)</b>	<input type="checkbox"/> <b>VALUE</b> <b>BUCKET</b> <input type="checkbox"/> Credit Card <input type="checkbox"/> Debit Card <input type="checkbox"/> Upi <input type="checkbox"/> Cash
<input type="checkbox"/> Bucket remaining values as Other	

1

### Edit Bucket Column

\* Field  \* Bucket Name

All Values (4)	Search Values
<input type="text" value="Net Banking (0)"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/> 2	<input type="text" value="Search Values"/> <input type="button" value="X"/>
<input type="text" value="Cash (0)"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>	<input type="checkbox"/> <b>VALUE</b> <b>BUCKET</b> <input type="checkbox"/> Credit Card <input type="checkbox"/> Debit Card <input type="checkbox"/> Upi <input type="checkbox"/> Cash
<b>Unbucketed Values (4)</b>	
<input type="checkbox"/> Bucket remaining values as Other	

## Edit Bucket Column

\* Field  \* Bucket Name

All Values (4)
Net Banking (0) <input type="button" value="Edit"/> <input type="button" value="Delete"/>
Cash (0) <input type="button" value="Edit"/> <input type="button" value="Delete"/>
Unbucketed Values (4)

Bucket remaining values as Other

Add Bucket

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

## Edit Bucket Column

\* Field  \* Bucket Name

All Values (4)
Net Banking (0) <input type="button" value="Edit"/> <input type="button" value="Delete"/>
Cash (0) <input type="button" value="Edit"/> <input type="button" value="Delete"/>
Unbucketed Values (4)

Bucket remaining values as Other

Add Bucket

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

Net Banking

Cash

Unbucketed Values

New Bucket

### Edit Bucket Column

* Field	* Bucket Name										
Payment	Payment type										
<b>All Values (4)</b> Net Banking (3) Cash (0) Unbucketed Values (1) <input type="checkbox"/> Bucket remaining values as Other	Search Values <table border="1"> <thead> <tr> <th>VALUE</th> <th>BUCKET</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/> Credit Card</td> <td> Net Banking</td> </tr> <tr> <td><input type="checkbox"/> Debit Card</td> <td> Net Banking</td> </tr> <tr> <td><input type="checkbox"/> Upi</td> <td> Net Banking</td> </tr> <tr> <td><input checked="" type="checkbox"/> Cash</td> <td></td> </tr> </tbody> </table>	VALUE	BUCKET	<input type="checkbox"/> Credit Card	Net Banking	<input type="checkbox"/> Debit Card	Net Banking	<input type="checkbox"/> Upi	Net Banking	<input checked="" type="checkbox"/> Cash	
VALUE	BUCKET										
<input type="checkbox"/> Credit Card	Net Banking										
<input type="checkbox"/> Debit Card	Net Banking										
<input type="checkbox"/> Upi	Net Banking										
<input checked="" type="checkbox"/> Cash											
<input type="button" value="Add Bucket"/> <input style="border: 2px solid red; padding: 2px; margin-left: 10px;" type="button" value="Move To"/>											
		<input type="button" value="Cancel"/> <input style="border: 2px solid red; padding: 2px;" type="button" value="Apply"/>									

### Edit Bucket Column

* Field	* Bucket Name				
Payment	Payment type				
<b>All Values (4)</b> Net Banking (3) Cash (1) Unbucketed Values (0) <input type="checkbox"/> Bucket remaining values as Other	Search Values <table border="1"> <thead> <tr> <th>VALUE</th> <th>BUCKET</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/> Cash</td> <td> Cash</td> </tr> </tbody> </table>	VALUE	BUCKET	<input checked="" type="checkbox"/> Cash	Cash
VALUE	BUCKET				
<input checked="" type="checkbox"/> Cash	Cash				
<input type="button" value="Add Bucket"/> <input style="border: 2px solid red; padding: 2px; margin-left: 10px;" type="button" value="Move To"/>					
		<input type="button" value="Cancel"/> <input style="border: 2px solid red; padding: 2px;" type="button" value="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

Fields

Groups

Columns

Consultant: Consultant Name

Delivery Type

Products

Payment

Payment type

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

Fields

Groups

GROUP ROWS

Add group...

Payment type

GROUP COLUMNS

Add group...

Columns

Add column...

Consultant: Consultant Name

Delivery Type

Products

Payment

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

	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

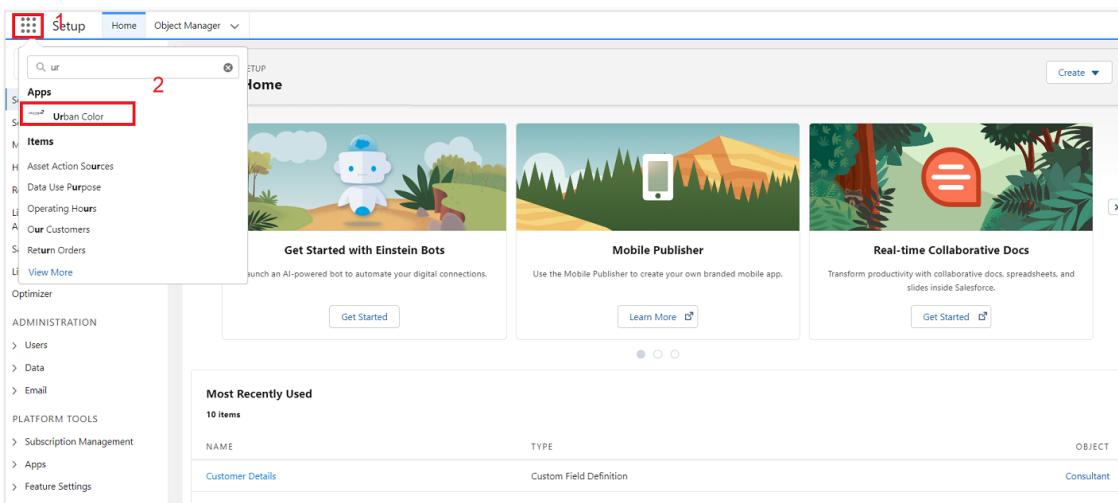
Total (9)

Save Report

<input style="width: 100%;" type="text" value="Report Name"/> <input style="width: 100%;" type="text" value="Consultants Report"/>	1
<input style="width: 100%;" type="text" value="Report Unique Name"/> <input style="width: 100%;" type="text" value="Consultants_Report_hvb"/>	
<input style="width: 100%;" type="text" value="Report Description"/>	
<input style="width: 100%;" type="text" value="Folder"/> <input style="width: 100%;" type="text" value="Private Reports"/>	2
<input type="button" value="Cancel"/> <input style="background-color: #0070C0; color: white; border: 1px solid #0070C0; border-radius: 5px; width: 100px; height: 30px;" type="button" value="Save"/>	

## View Report

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



The screenshot shows the Salesforce App Launcher interface. The 'Setup' icon is highlighted with a red box and labeled '1'. The search bar contains the text 'Urban Color' and is also highlighted with a red box and labeled '2'. The 'Urban Color' app card is visible in the main area. The bottom section displays a table titled 'Most Recently Used' with one item listed:

NAME	TYPE	OBJECT
Customer Details	Custom Field Definition	Consultant

Recent						
REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Consultants Report	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Private Reports	Hazari Ajay Kumar	12/17/2022, 7:50 PM	
Created by Me	Sample Flow Report: Screen Flows	Public Reports	Automated Process			
Private Reports	Opportunities Details	Private Reports	Hazari Ajay Kumar	4/12/2023, 11:46 PM		
Public Reports	Rental New 1	Public Reports	Hazari Ajay Kumar	2/2/2023, 10:39 PM		
All Reports						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						

A screenshot of the Salesforce Home page. At the top, there's a navigation bar with icons for Setup, Home, and Object Manager. The main search bar contains the text "ur" with a red box and the number "2" indicating recent searches. Below the search bar, a sidebar on the left lists various categories like Apps, Items, and Administration. The "Apps" section has a red box around it, and "Urban Color" is highlighted with a red border. The main content area features three cards: "Get Started with Einstein Bots", "Mobile Publisher", and "Real-time Collaborative Docs". Each card has a "Get Started" button. At the bottom, there's a section titled "Most Recently Used" with a table showing "Customer Details" and "Custom Field Definition".