

Cosmetic Store Management

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Abstract

This project presents a comprehensive Cosmetics Store Management system designed to streamline operations, enhance customer experience, and optimize inventory management within the cosmetics retail sector. The system integrates various functionalities, including product management, sales tracking, customer relationship management, and reporting features.

The objective of this project is to develop an efficient platform that enables store owners to manage their inventory effectively, track sales trends, and maintain customer records seamlessly. By implementing a user-friendly interface, the system aims to facilitate easy navigation for both staff and customers, ultimately improving service quality and operational efficiency.

Through this project, we also highlight the importance of data analytics in the cosmetics industry, providing insights that can drive marketing strategies and improve customer satisfaction. Overall, the Cosmetics Store Management system serves as a vital tool for retailers seeking to thrive in a competitive market while ensuring an enhanced shopping experience for their customers.

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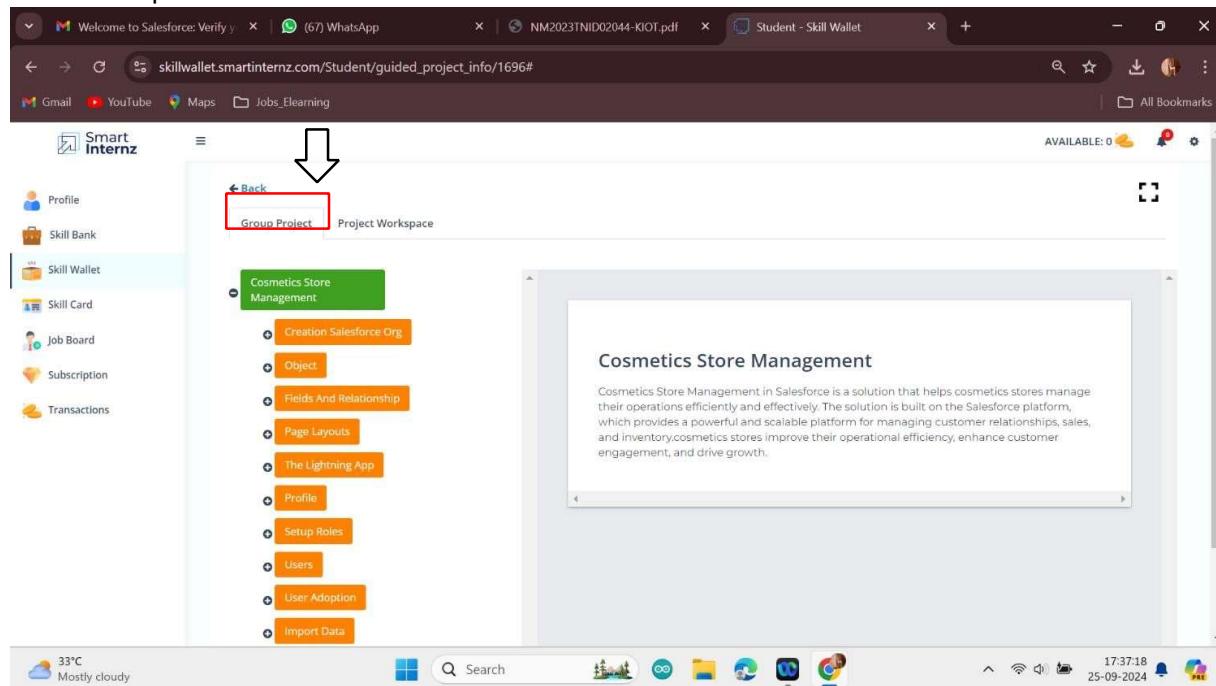
1.Creation Salesforce Org

1.1.Logging into SmartInternz Skill Wallet:

- 1. Visit**
- 2. The SmartInternz website:** Go to [SmartInternz](#).
- 3. Locate the Login Option:** On the homepage, find the login or sign-in option.
- 4. Use your credentials:** Enter the email and password you registered with. If you're using a platform-linked account (e.g., Google, LinkedIn), use the corresponding option to sign in.
- 5. Navigate to the Skill Wallet:** After logging in, go to your dashboard or profile section where you should find "Skill Wallet" or "Guided Projects" listed.

1.2.Accessing Guided Projects:

1. After logging in, navigate to the "Guided Projects" tab or section on the SmartInternz platform.
2. Here, you should be able to see any projects you've been assigned or those you've enrolled in.
3. Click on any project to view the details, guidelines, and resources you need to complete it.

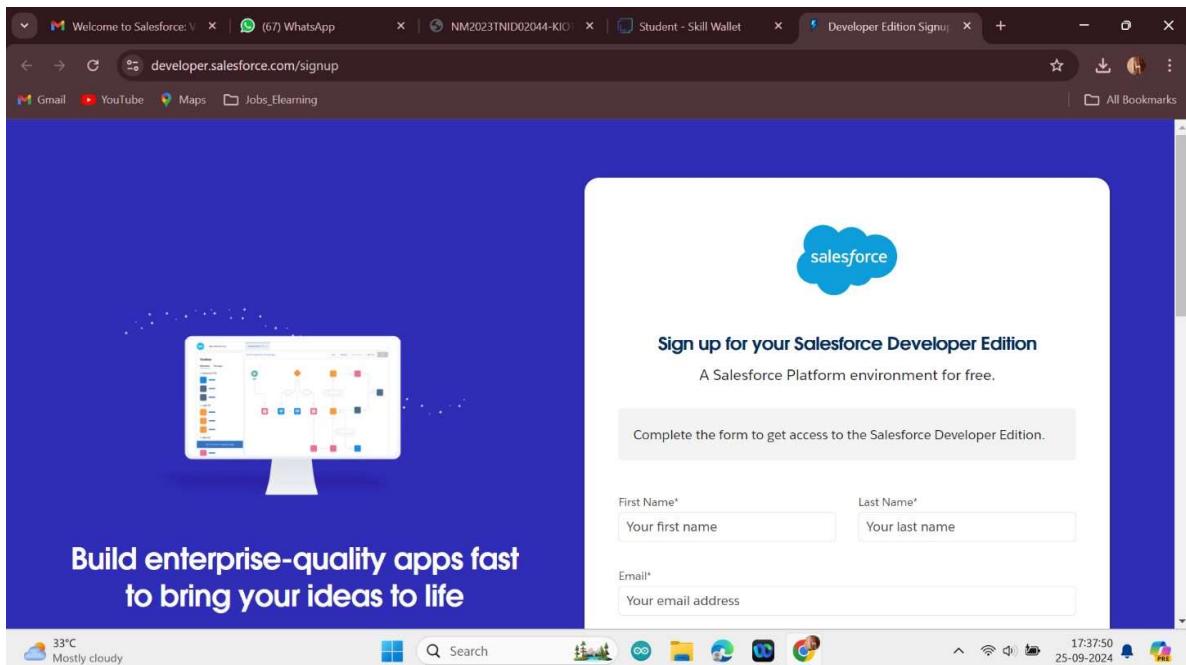


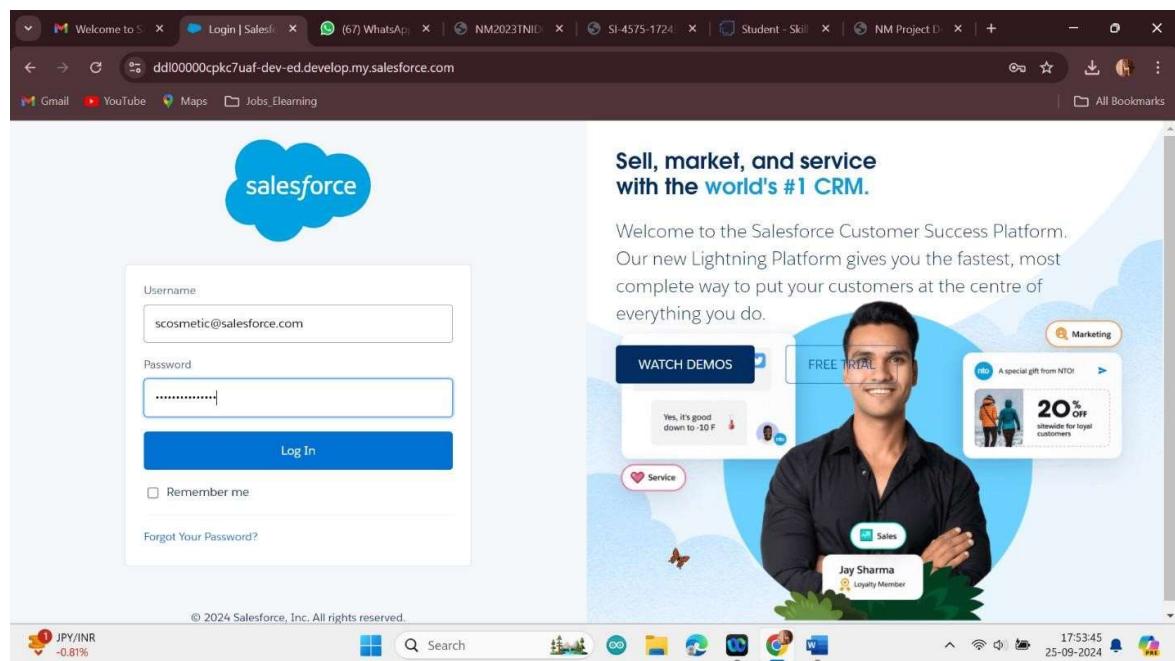
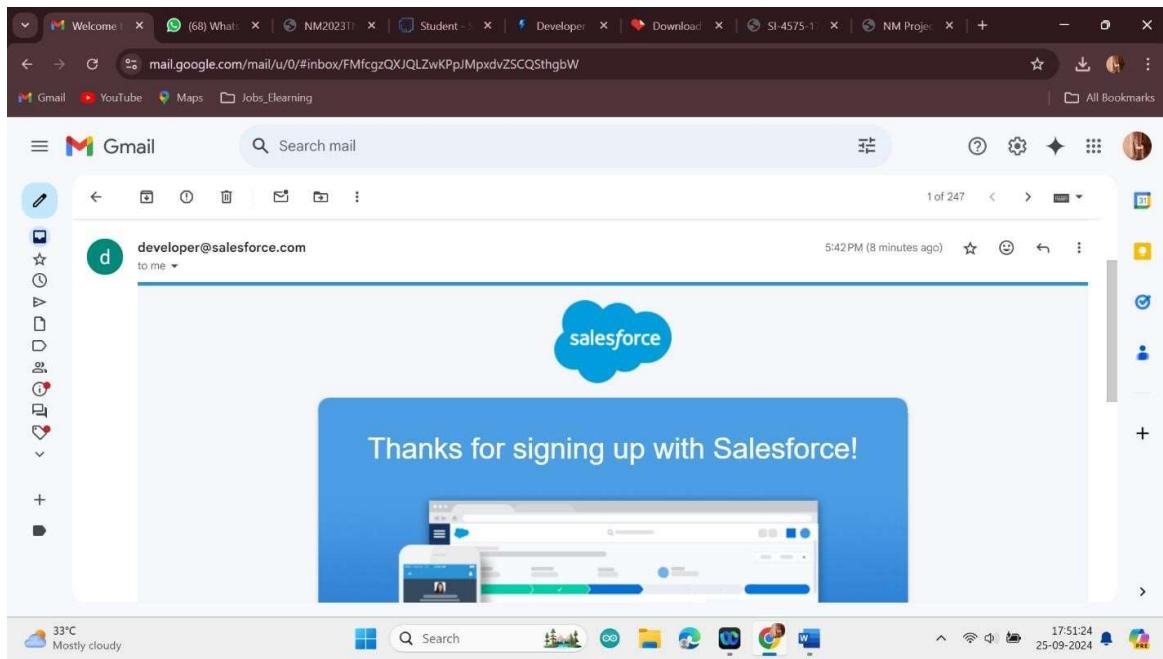
1.3.Creating Developer Account

Creating a developer org in salesforce.

1. Go to [developers.salesforce.com/signup](https://developer.salesforce.com/signup).
2. Click on sign up.
3. On the sign up form, enter the following details :
 - a. First name & Last name
 - b. Email
 - c. Role : Developer
 - d. Company : College Name
 - e. County : India
 - f. Postal Code : pin code
 - g. Username : should be a combination of your name and company.

This need not be an actual email id, you can give anything in the format
[:username@organization.com](mailto:username@organization.com) Click on sign up after filling these.





2.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.

2.1.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.

The screenshot shows the Salesforce Object Manager page. At the top, there is a navigation bar with tabs for 'Setup', 'Home', and 'Object Manager'. The 'Object Manager' tab is highlighted with a red box and has a dropdown arrow next to it. Below the navigation bar is a search bar labeled 'Search Setup'. On the right side of the header, there are buttons for 'Quick Find', 'Schema Builder', and 'Create'. A large blue arrow points from the 'Object Manager' tab down to the 'New Custom Object' page.

Object Manager

51+ items. Sorted by Label

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED
Account	Account	Standard Object		
Activity	Activity	Standard Object		
Address	Address	Standard Object		
Alternative Payment Method	AlternativePaymentMethod	Standard Object		
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object		
Appointment Category	AppointmentCategory	Standard Object		
Appointment Invitation	AppointmentInvitation	Standard Object		
Appointment Invitee	AppointmentInvitee	Standard Object		
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object		
Asset	Asset	Standard Object		
Asset Action	AssetAction	Standard Object		
Asset Action Source	AssetActionSource	Standard Object		

New Custom Object

Help for this Page ⓘ

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)

Custom Object Definition Edit

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.

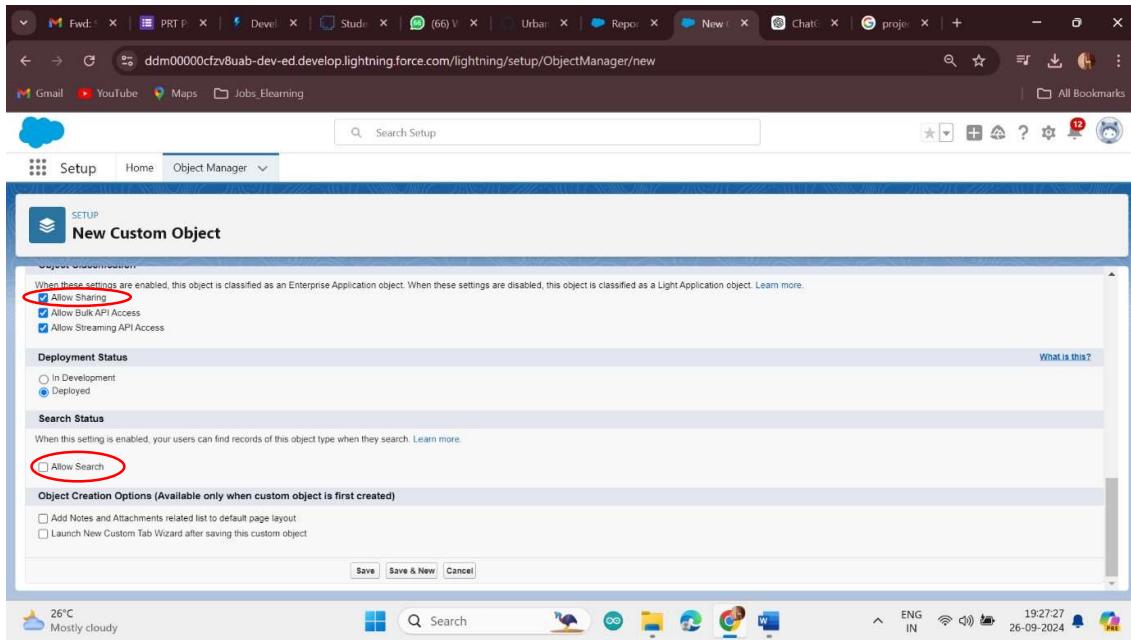
Label: Example: Account **Plural Label:** Example: Accounts **Starts with vowel sound:**

The Object Name is used when referencing the object via the API.

Object Name: Example: Account

Description:

26°C Mostly cloudy



2.2.Consultants 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 Consultant Object

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

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

2.3.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.

2.4.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.

tabs

User Interface

Rename Tabs and Labels

Tabs

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

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

New | What Is This?

Action	Label	Tab Style	Description
Edit Del	Consultants	Cell phone	
Edit Del	others	Cup	
Edit Del	Our Customers	Apple	
Edit Del	Retailers	Computer	

30°C Mostly cloudy

Search

18:02:03 25-09-2024

An object relationship in Salesforce is a two-way association between two objects.

3.Fields and Relationship

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.

3.1.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 Object Manager interface. At the top, there's a navigation bar with tabs like 'Welcome', 'What's New', 'NM Project', 'NM2023I', 'SI-4575-1', 'Home | So', 'Student -', 'Our Customer', and a '+' button. Below the bar, the URL is visible: 'dd100000cpkc7uaf-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01l000002cvKH/FieldsAndRelationships/view'. The main area has a blue header bar with 'SETUP > OBJECT MANAGER' and a back arrow icon. Below it, the object name 'Our Customer' is displayed with a red oval and arrow highlighting it. On the left, a sidebar lists 'Details', 'Fields & Relationships' (which is selected), and other options like 'Page Layouts', 'Lightning Record Pages', etc. The right side shows a table titled 'Fields & Relationships' with 10 items. The table columns are 'Field Label', 'Name', and 'Type'. The fields listed are: Customer Name (Customer_Name_c, Text(25)), Email id (Email_id_c, Email), Last Modified By (LastModifiedById, Lookup(User)), Mobile Number (Mobile_Number_c, Phone), Our Customer (Name, Text(80)), and Owner (OwnerId, Lookup(User,Group)). There are also icons for 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking'.

3.2.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

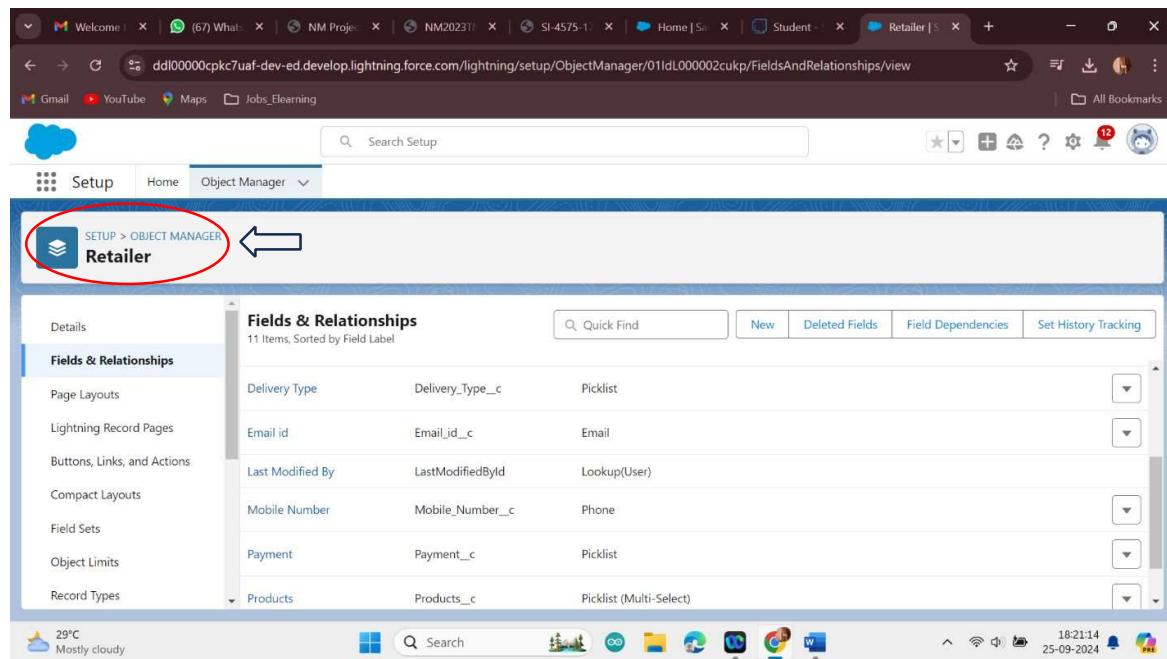
The screenshot shows the Salesforce setup interface for the 'Consultant' object. The top navigation bar includes tabs for 'Setup', 'Home', and 'Object Manager'. Below this, the breadcrumb trail shows 'SETUP > OBJECT MANAGER > Consultant'. A red circle and a blue arrow point to the 'Consultant' tab in the breadcrumb trail. The main content area displays the 'Fields & Relationships' section for the 'Consultant' object, listing various fields like 'Customer Details', 'Customer id', 'Customer Name', etc., along with their field labels and data types.

3.3.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)



The screenshot shows the Salesforce Setup interface. At the top, there's a navigation bar with various tabs and links. Below it is a header with a search bar and some icons. The main content area is titled "SETUP > OBJECT MANAGER" and shows the "Retailer" object. On the left, there's a sidebar with options like "Fields & Relationships", "Page Layouts", "Lightning Record Pages", etc. The main pane displays a table of fields and their details. At the bottom, there's a taskbar with various icons and system status information.

Field Label	Type	Description
Delivery Type	Picklist	
Email id	Email	
Last Modified By	Lookup(User)	
Mobile Number	Phone	
Payment	Picklist	
Products	Picklist (Multi-Select)	

3.4.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

The screenshot shows the Salesforce Object Manager interface. At the top, there's a navigation bar with tabs like 'Setup', 'Home', and 'Object Manager'. Below it, the breadcrumb trail reads 'SETUP > OBJECT MANAGER > other'. A red circle highlights the 'other' icon in the breadcrumb. To the right of the breadcrumb, there's a back arrow icon. The main area is titled 'Fields & Relationships' and shows a list of 8 items, sorted by Field Label. The list includes fields like 'Employee', 'Last Modified By', 'Name', 'others', 'Owner', and 'Products'. Each field is listed with its label, API name, and data type. On the left side, there's a sidebar with links for 'Details', 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', and 'Record Types'. At the bottom of the screen, there's a system status bar showing weather (29°C, Mostly cloudy), search, file, and system icons, along with the date and time (25-09-2024, 18:24:38).

4.Page Layouts

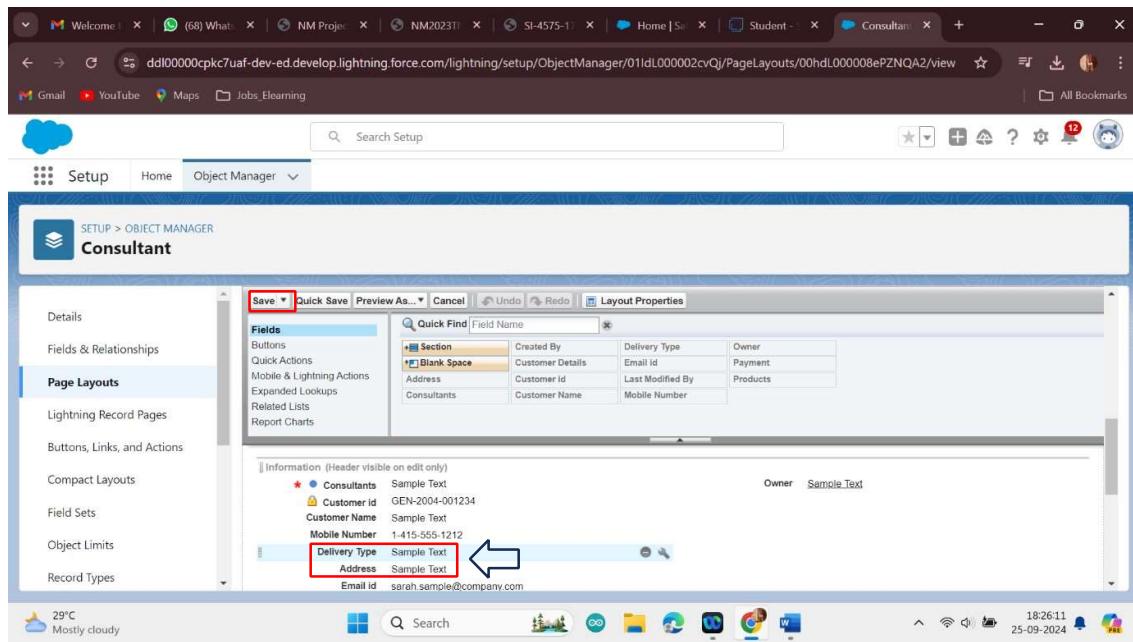
In Salesforce, page layouts define the organisation and arrangement of fields, buttons, related lists, and other components on an object's detail and edit pages. They allow you to control the user interface and tailor it to meet the specific needs of your organisation.

4.1. Page Layout Creation

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

The screenshot shows the Salesforce Object Manager interface for the 'Consultant' object. The top navigation bar includes links for Welcome, (68) What's New, NM Project, NM2023I, SI-4575-1, Home, Student, Consultant, and a plus sign for new items. Below the bar are links for Gmail, YouTube, Maps, and Jobs Learning. The main header has a cloud icon, 'Search Setup', and various navigation buttons. The main content area is titled 'SETUP > OBJECT MANAGER Consultant'. On the left, a sidebar lists 'Page Layouts' (which is highlighted with a red box), 'Details', 'Fields & Relationships', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', and 'Record Types'. The main panel shows a table titled 'Page Layouts' with one item: 'Consultant Layout' created by Tapasi Likitha Reddy on 25/09/2024 at 5:58 pm, last modified by the same user on 25/09/2024 at 6:13 pm. A 'New' button and a 'Page Layout Assignment' link are also present. The bottom of the screen shows a taskbar with icons for weather (29°C, Mostly cloudy), search, file, browser, and windows, along with system status indicators like battery level and date/time (25-09-2024, 18:25:08).

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



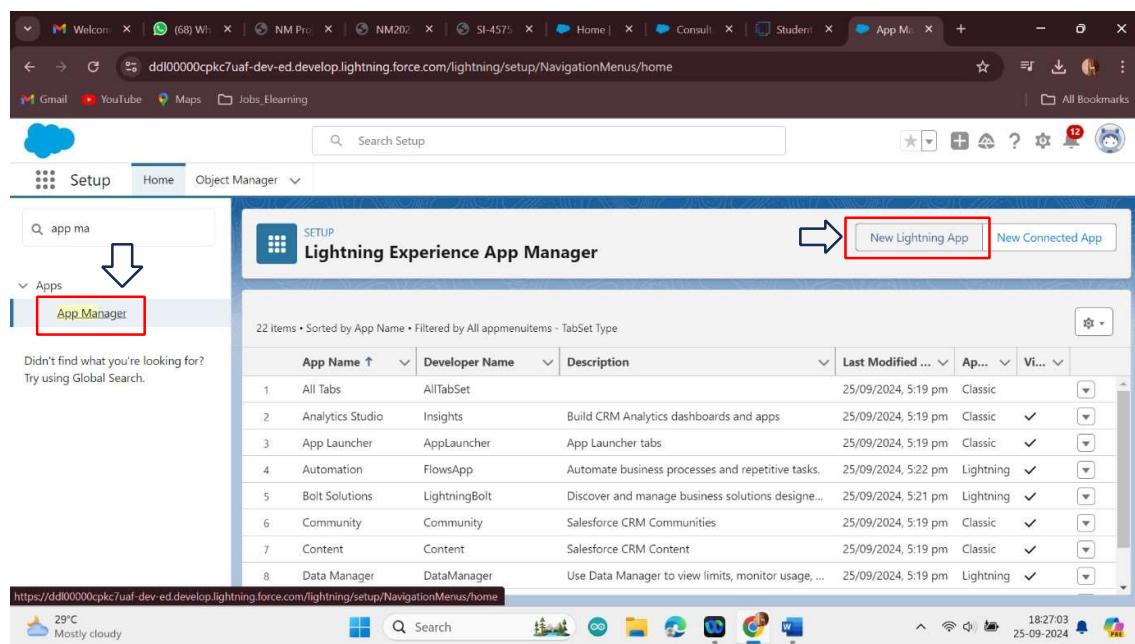
5.The Lightning App

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

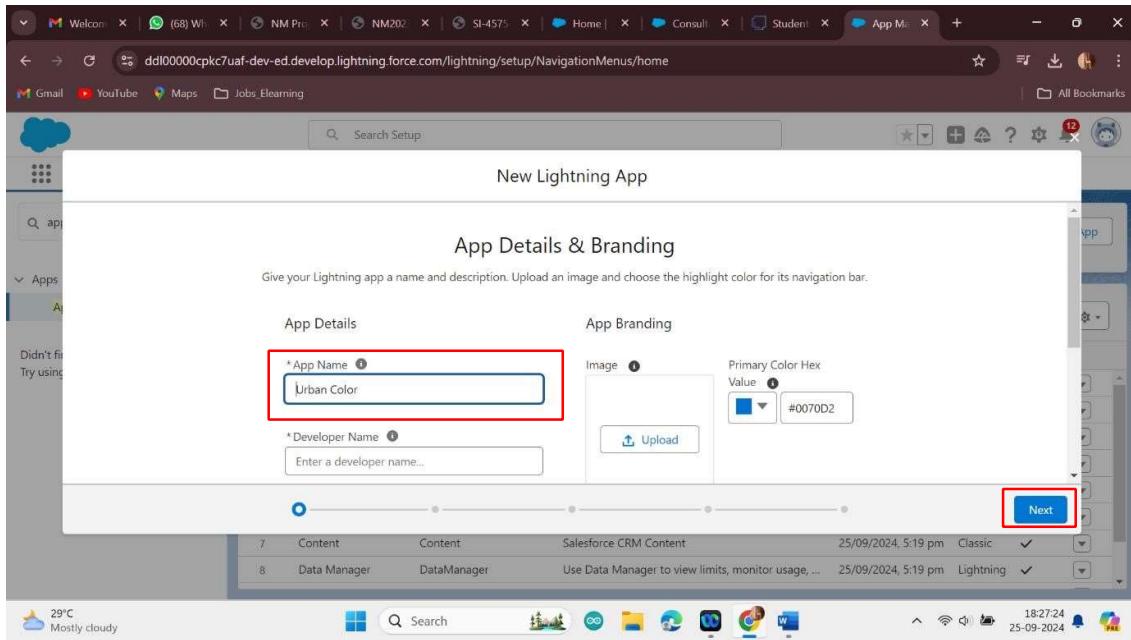
Lightning apps let you brand your apps with a custom Color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your org can work more efficiently by easily switching between apps.

5. 1.Create a Lightning App To create a lightning app page:

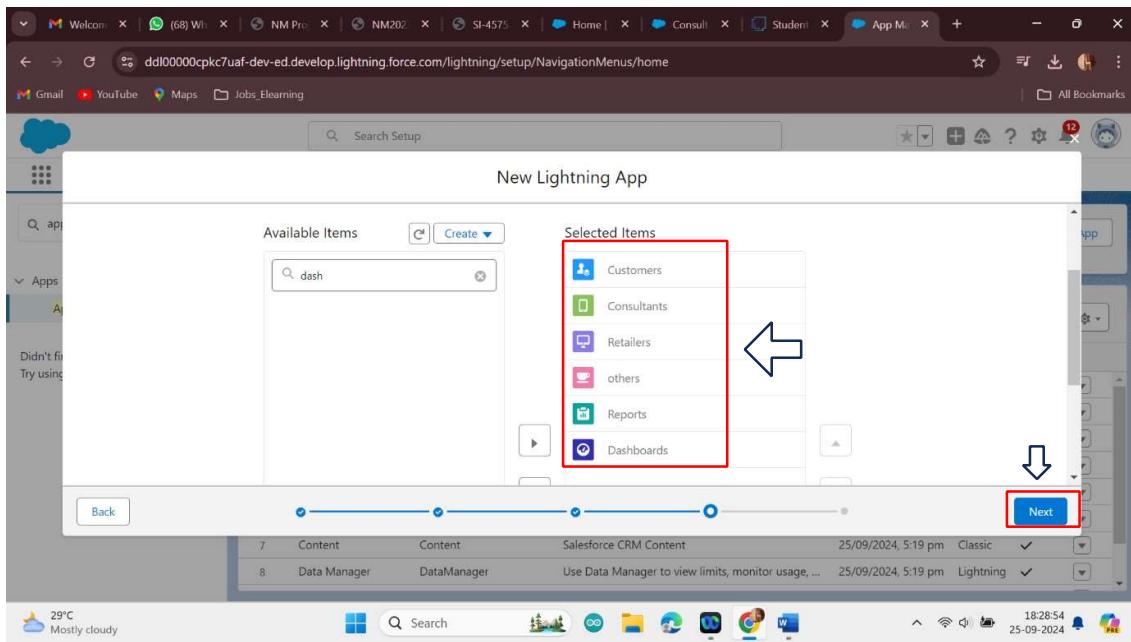
1. Go to setup page --> search “app manager” in quick find --> select “app manager” --> click on New lightning App.



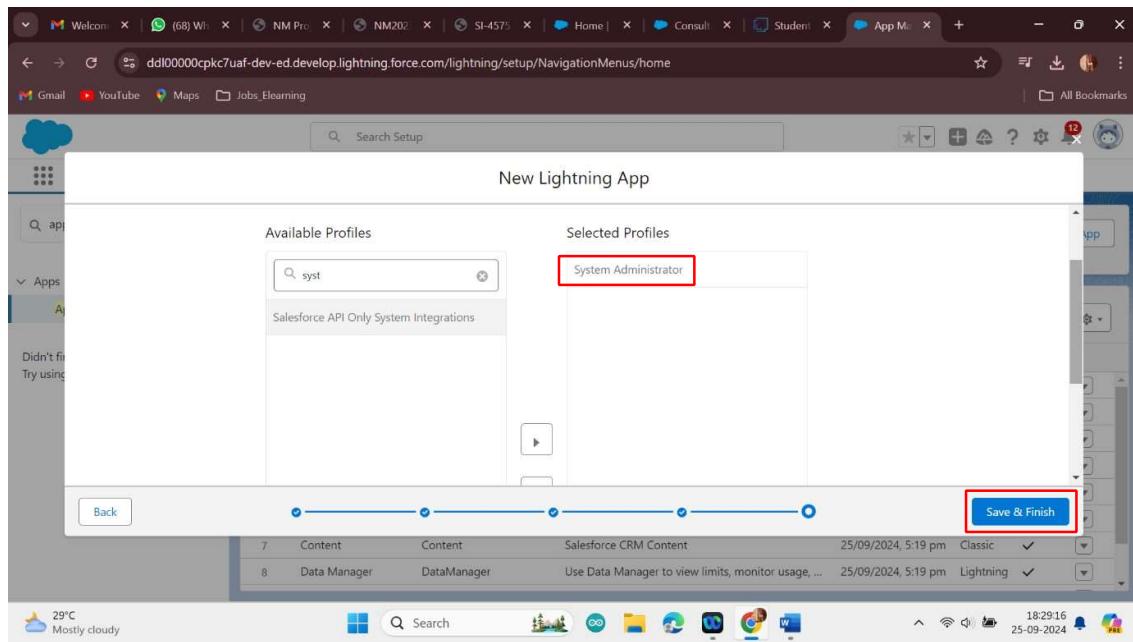
2. Fill the app name as Urban Color in app details and branding --> Next --> (App option page) keep it as default --> Next --> (Utility Items) keep it as default --> Next.



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.



6.Profile

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

6.1.Creating a Profiles

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

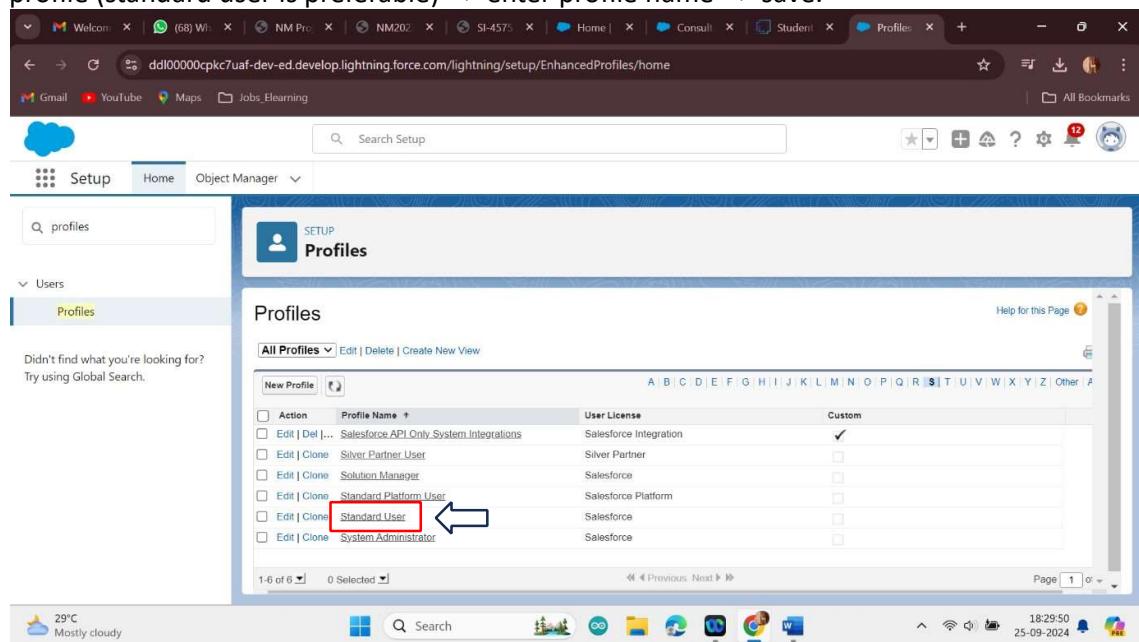
Creating a Profiles:

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 with the 'Profiles' page open. The 'Profiles' section is displayed, showing a list of profiles. One profile, 'Standard User', is highlighted with a red box and a blue arrow pointing to it from the left. The list includes other profiles like 'Salesforce API Only System Integrations', 'Silver Partner User', 'Solution Manager', 'Standard Platform User', and 'System Administrator'. The interface includes standard Salesforce navigation elements like the sidebar, search bar, and various tabs.

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

The screenshot shows the Salesforce Setup - Profiles page. In the center, there is a grid titled "Basic Access" and "Data Administration" for various user profiles. A red box highlights the row for "Consultants" and the column for "Retailers". Both "Read", "Create", "Edit", "Delete", "View All", and "Modify All" checkboxes are checked for both rows and columns.

Object	Basic Access						Data Administration					
	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	Delete	View All	Modify All
Consultants	<input checked="" type="checkbox"/>											
Others	<input checked="" type="checkbox"/>											
Our Customers	<input checked="" type="checkbox"/>											
Retailers	<input checked="" type="checkbox"/>											

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

The screenshot shows the Salesforce Setup - Profile page for the "Billing Operator" profile. The "Name" field is highlighted with a red box. The "User License" is set to "Salesforce Platform". The "Custom Profile" checkbox is checked. The "Created By" field shows "Tapasi Likitha Reddy, 25/09/2024, 6:31 pm" and the "Modified By" field shows "Tapasi Likitha Reddy, 25/09/2024, 6:32 pm".

Name	User License	Custom Profile	
Billing Operator	Salesforce Platform	<input checked="" type="checkbox"/>	
Description			
Created By	Tapasi Likitha Reddy, 25/09/2024, 6:31 pm	Modified By	Tapasi Likitha Reddy, 25/09/2024, 6:32 pm

7. Setup Roles

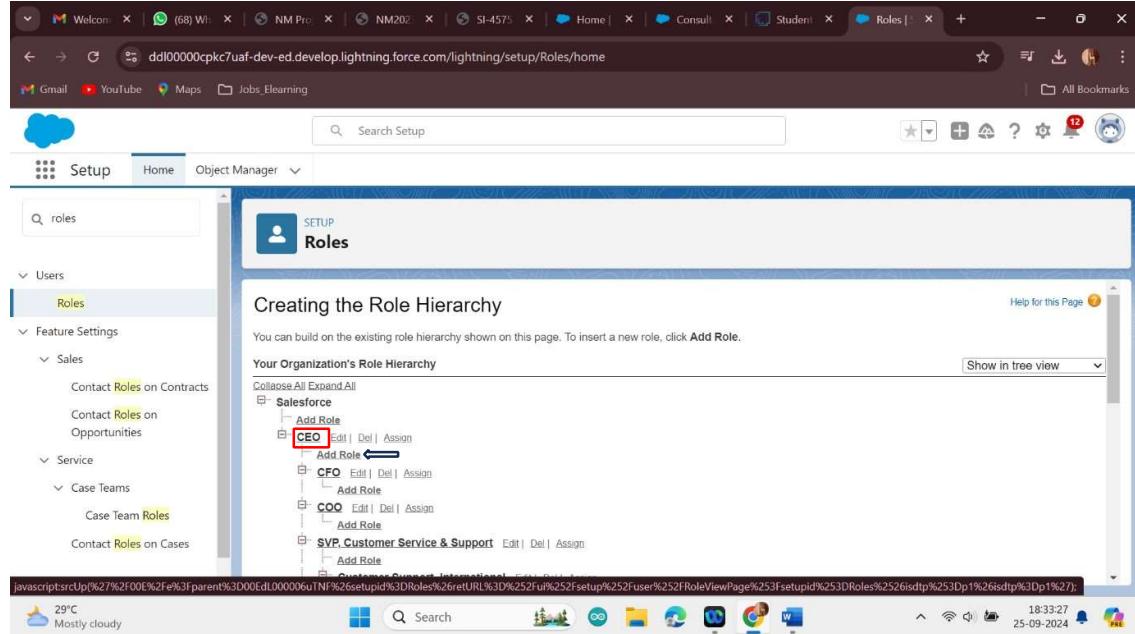
Roles are record-level access controls that define what data a user can see in Salesforce.

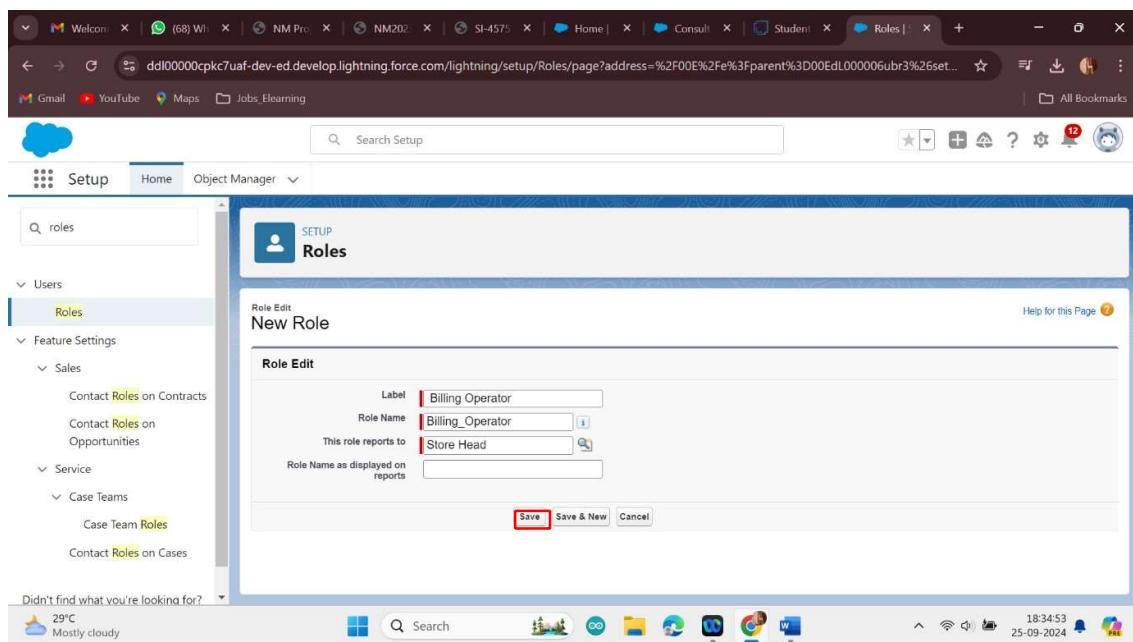
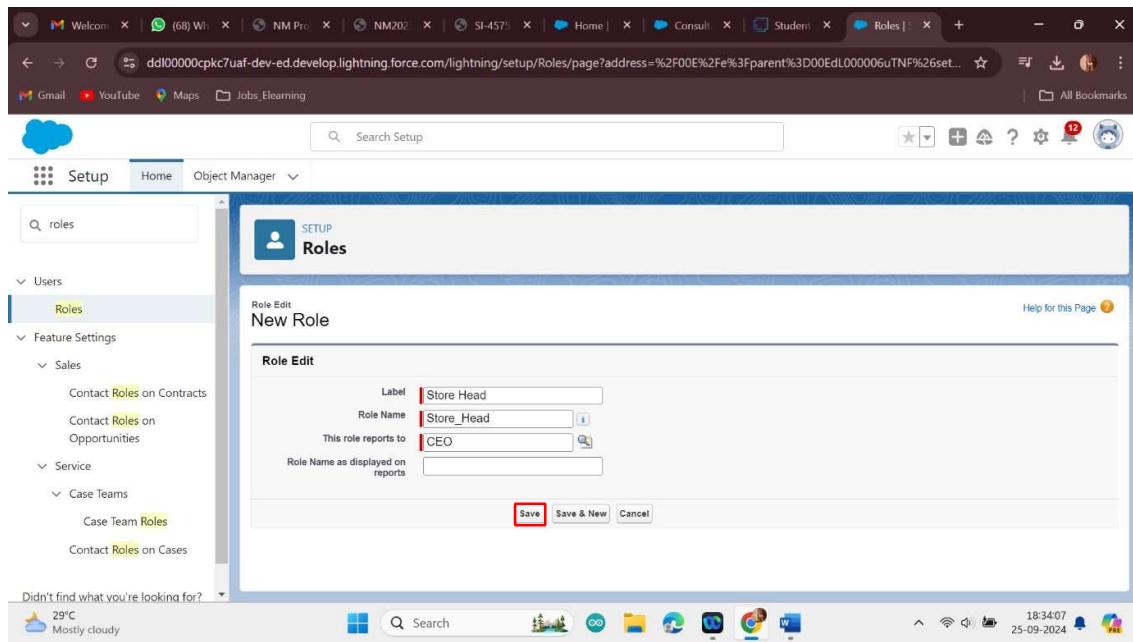
7.1. Setup Roles

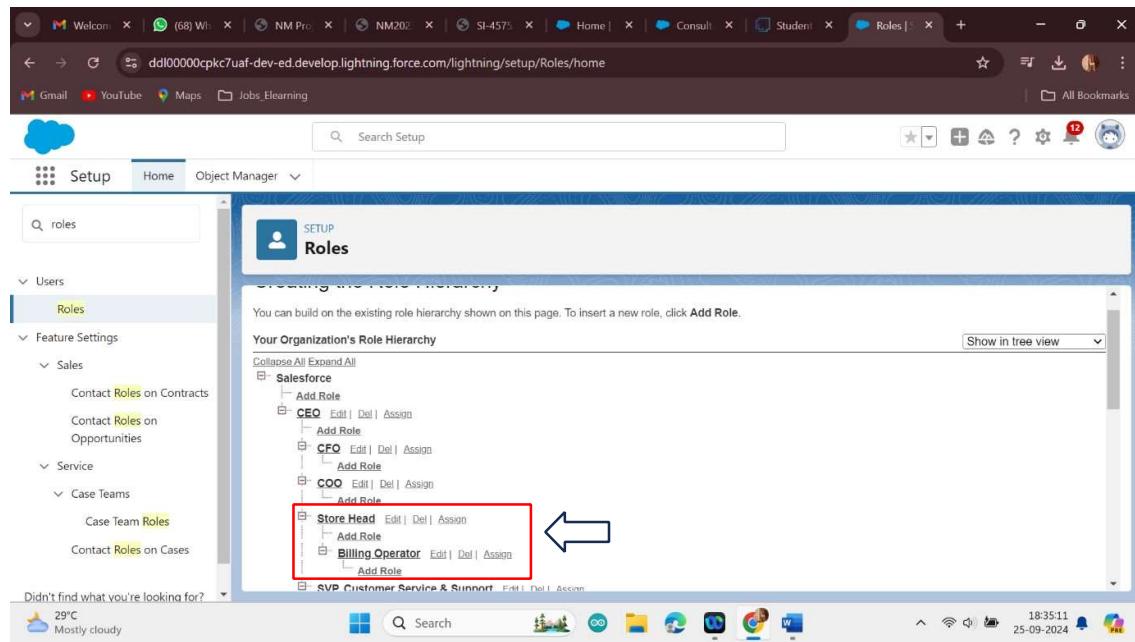
1. Click on the Gear Icon
2. Click "Setup"
3. In the Quick Find box, enter "Roles"
4. Click "Roles"
5. Click on "Set Up Roles"
6. Click "Expand All"
7. Under the CEO, click on "Add Role"
8. Fill up the Label as Store Head, Role Name Store_Head.
9. Enter a Role name that will be displayed on Reports

10. Click on Save .

Similarly create One Roles under Store Head as Billing Operator.







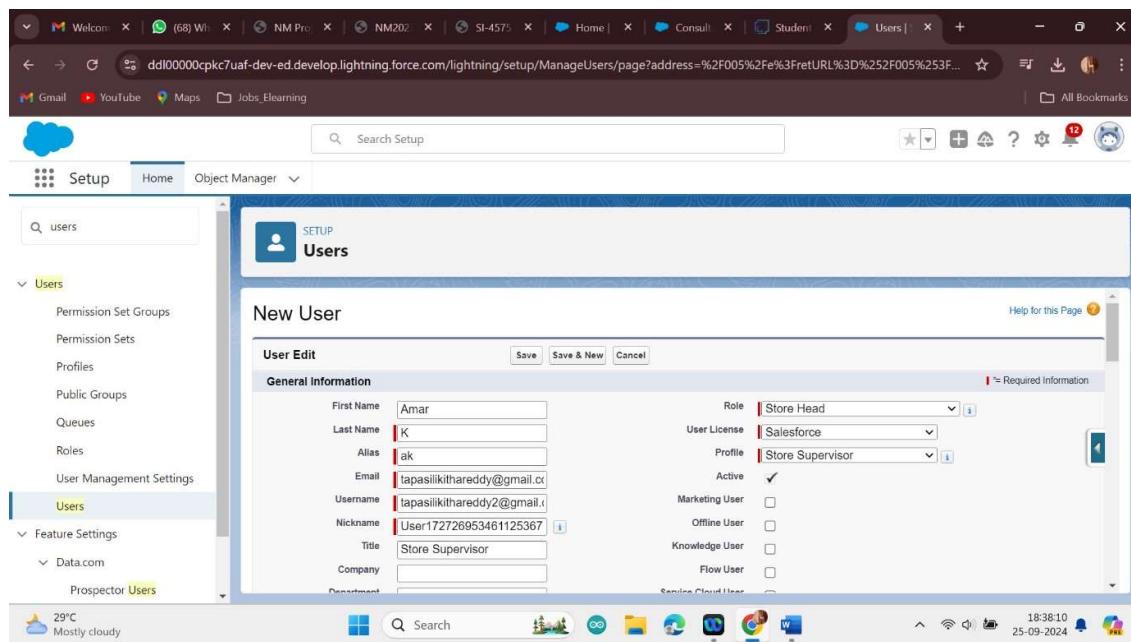
8.Users

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account.

8.1.Creating a Users:

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.



8.2.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 image consists of three vertically stacked screenshots of the Salesforce Setup interface, specifically the 'Users' section.

Screenshot 1: User Edit Page

This screenshot shows the 'User Edit' page for a user named 'John'. The 'General Information' section is filled with the following details:

- First Name: John
- Last Name: Teddy
- Alias: jtedd
- Email: tapasilikithareddy@gmail.com
- Username: tapasilikithareddy@gmail.com
- Nickname: User1727269721810866363
- Title: Vehicle Manager
- Company: (empty)
- Department: (empty)
- Division: (empty)
- Role: Billing Operator
- User License: Salesforce Platform
- Profile: Billing Operator
- Active: checked
- Marketing User: unchecked
- Offline User: unchecked
- Knowledge User: unchecked
- Flow User: unchecked
- Service Cloud User: unchecked
- Site.com Contributor User: unchecked

Screenshot 2: Locale Settings Page

This screenshot shows the 'Locale Settings' page. The settings are as follows:

- Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)
- Locale: English (India)
- Language: English
- Delegated Approver: (empty)
- Manager: (empty)
- Receive Approval Request Emails: Only if I am an approver
- Generate new password and notify user immediately: checked

Screenshot 3: Summary of Configuration

This screenshot provides a summary of the configuration steps taken:

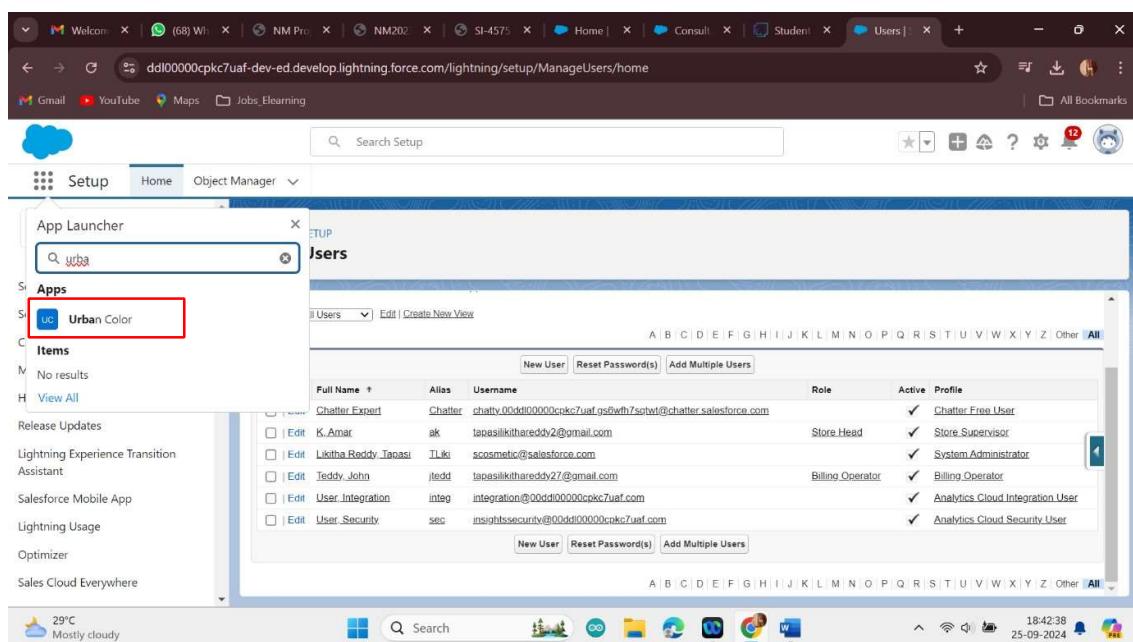
- First Name: John
- Last Name: Teddy
- Alias: jtedd
- Email: tapasilikithareddy@gmail.com
- Username: tapasilikithareddy@gmail.com
- Nickname: User1727269721810866363
- Title: Vehicle Manager
- Company: (empty)
- Department: (empty)
- Division: (empty)
- Role: Billing Operator
- User License: Salesforce Platform
- Profile: Billing Operator
- Active: checked
- Marketing User: unchecked
- Offline User: unchecked
- Knowledge User: unchecked
- Flow User: unchecked
- Service Cloud User: unchecked
- Site.com Contributor User: unchecked
- Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)
- Locale: English (India)
- Language: English
- Delegated Approver: (empty)
- Manager: (empty)
- Receive Approval Request Emails: Only if I am an approver
- Generate new password and notify user immediately: checked

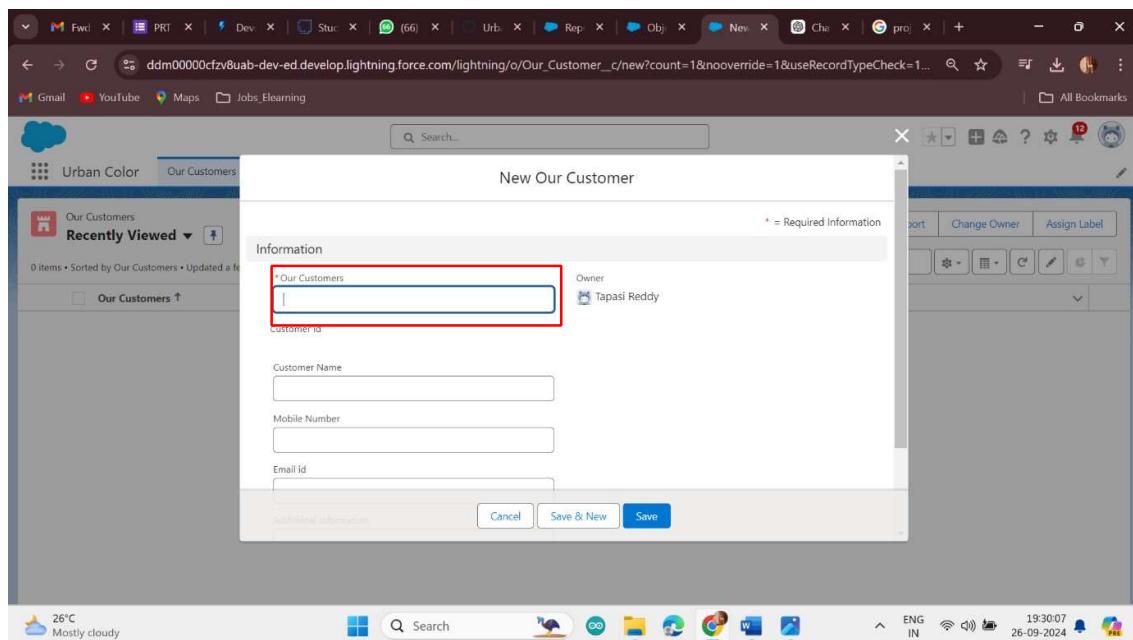
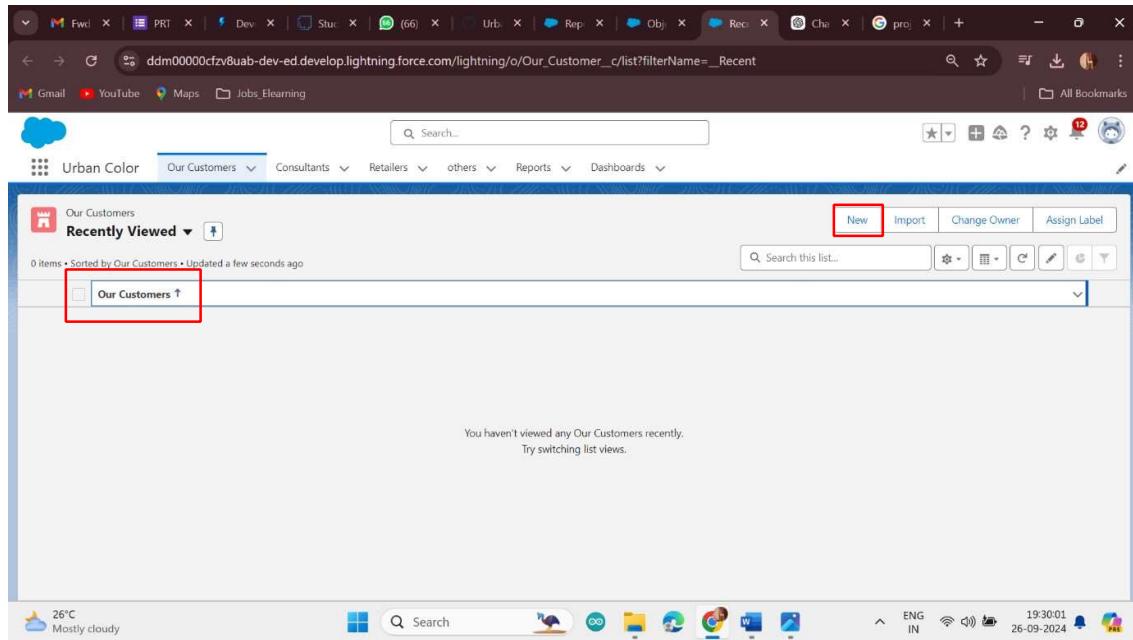
9.User Adoption

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

9.1.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



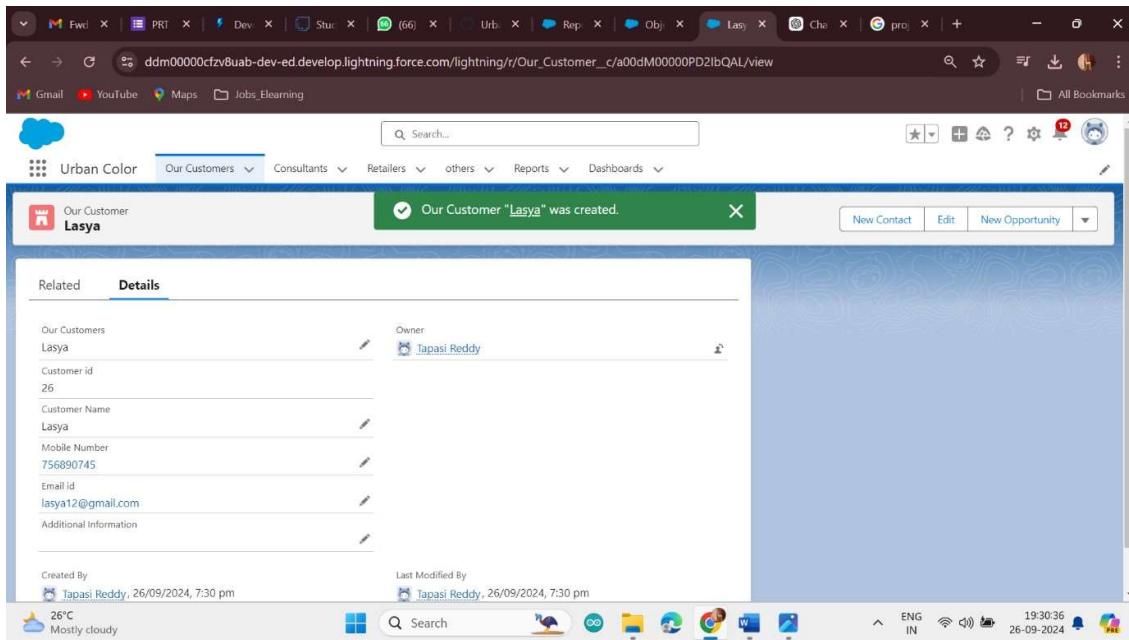


9.2.View Record (Our Customer)

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.

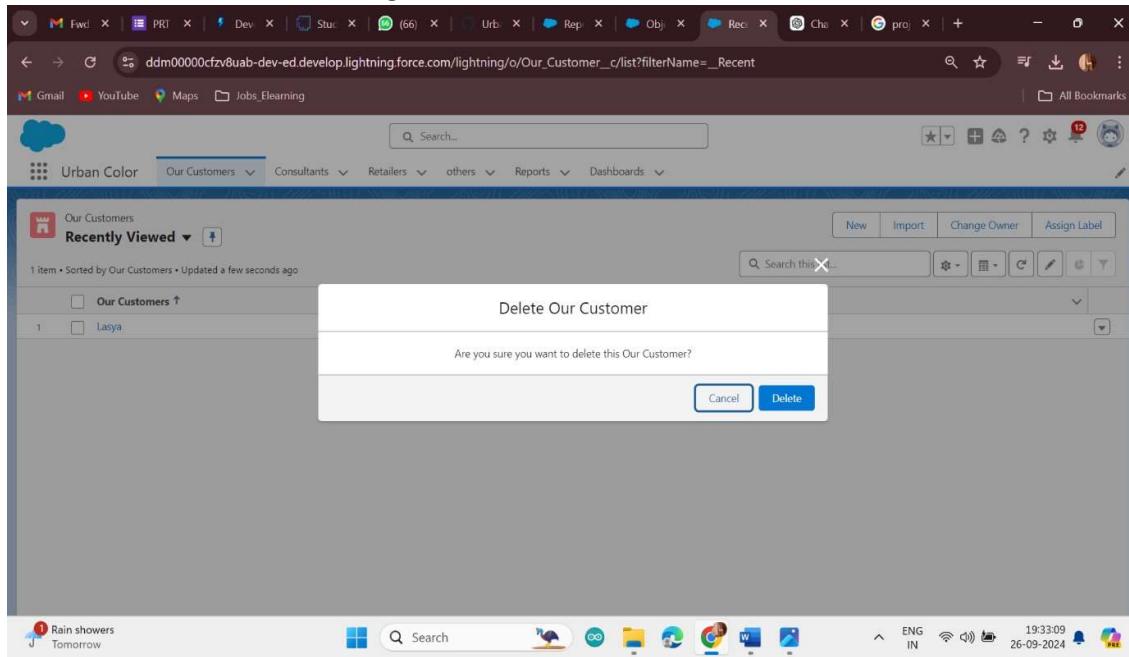
- Click on any record name. you can see the details of the Our Customer.



9.3.Delete Record (Our Customer)

Delete Record (Our Customer):

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

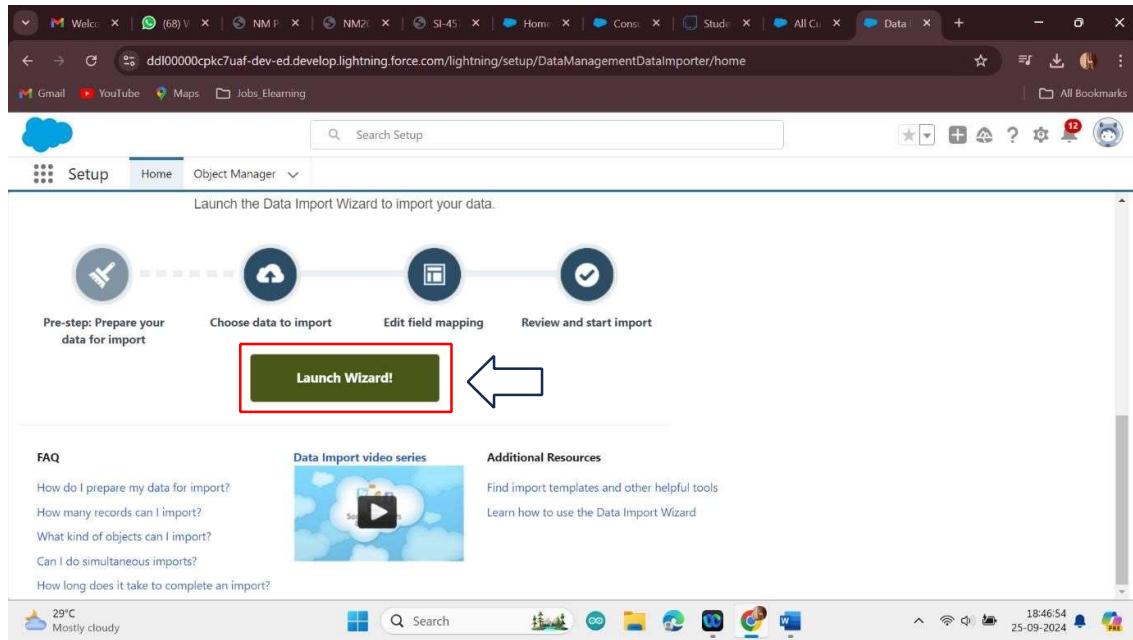


10.Import Data

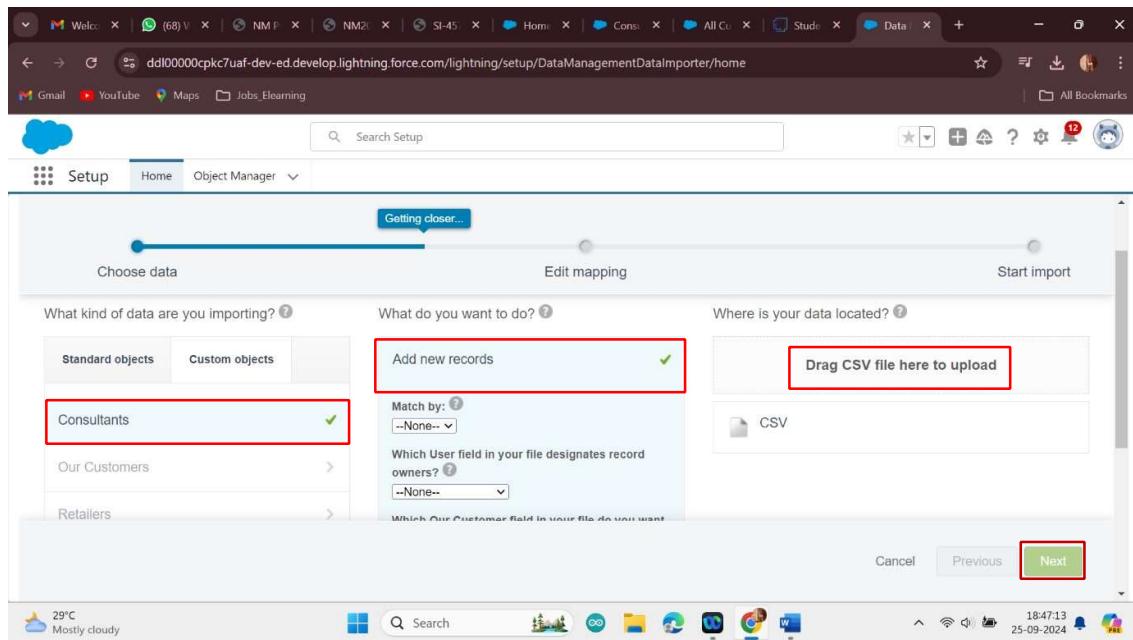
Data Import Wizard—this tool, accessible through the Setup menu, lets you import data in common standard objects, such as contacts, leads, accounts, as well as data in custom objects.

10.1.To Import Data

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



4. Click the Custom Objects tab and select the Consultant object.
5. Select Add new records.
6. Click CSV and choose 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 a data import process. At the top, a progress bar indicates 'Almost done'. Below it, a table maps CSV fields to Salesforce objects:

Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	Customer Name	Consultant Name	Dev Raj	Ajith	Babu
Change	Mobile Number	Mobile Number	984638732	784639673	902839439
Change	Delivery Type	Delivery Type	Self Pickup	Courier	Self Pickup
Change	Address	Address	Mumbai	Hyderabad	Delhi
Change	Products	Products	Lipstick	Compact	FacePack
Change	Payment	Payment	Cash	UPI	Credit Card
Change	Email id	Email		ajith@gmail.com	Babu04@gmail.com

At the bottom right, there are 'Cancel', 'Previous', and a green 'Next' button, with the 'Next' button highlighted by a red box.

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

The screenshot shows the 'Review & Start Import' step. A progress bar at the top indicates 'Great job!'. The interface includes sections for 'Your selections', 'Your import will include:', and 'Your import will not include:'.

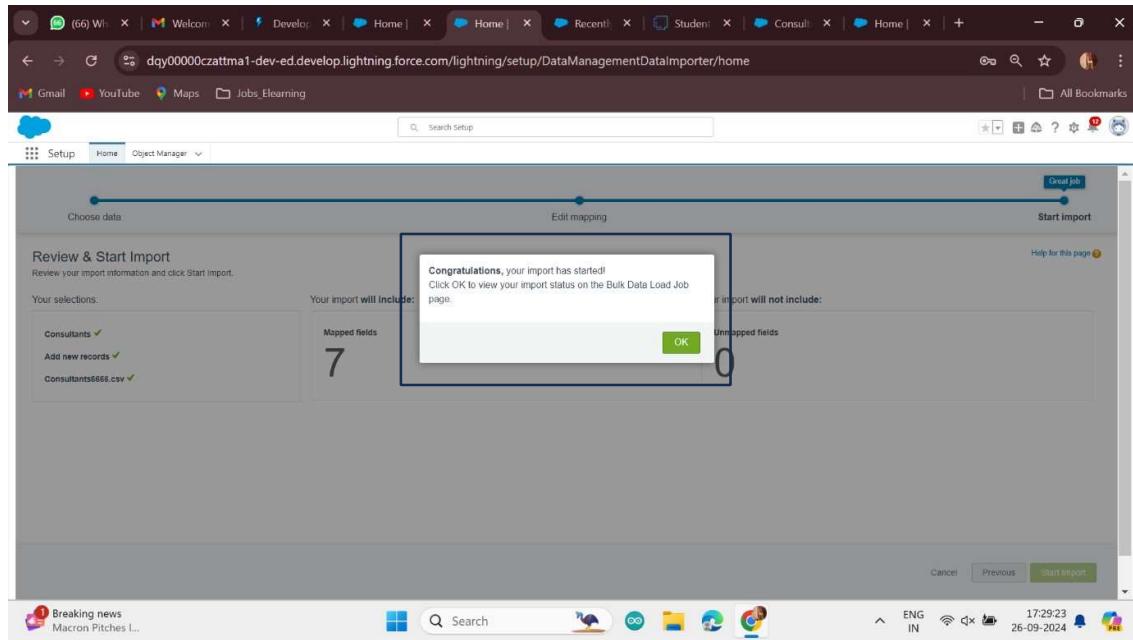
Your selections:
Consultants ✓
Add new records ✓
Consultants666.csv ✓

Your import will include:
Mapped fields: 7
Unmapped fields: 0

Your import will not include:

At the bottom right, there are 'Cancel', 'Previous', and a green 'Start Import' button, with the 'Start Import' button highlighted by a red box.

9. Click OK on the popup



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

								Records Processed	Records Failed			
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	751Qy000006Fylg	26/09/2024, 5:29 pm	26/09/2024, 5:29 pm	103	41	0	9	0	0	Complete	

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

Note - Do Field mapping carefully.

11.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

3. 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.

11.1.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 – Consultant Name, 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 Report Builder interface. The report is titled "New Consultants Report" for the "Consultants" object. The outline section is expanded, showing "GROUP ROWS" (highlighted with a red box) and "Payment type" (also highlighted with a red box). The main data grid displays records for consultants like Ajith, Babu, Chitra, Swathi, Prasad, Ajay Kumar, and Sandeep, categorized by delivery type, products, and payment method. A red box also highlights the "Subtotal" section in the outline.

	Consultant	Delivery Type	Products	Payment
a01dM00000Y1W2	Ajith	Courier	Compact	UPI
a01dM00000Y1W3	Babu	Self Pickup	FacePack	Credit Card
a01dM00000Y1W4	Chitra	Courier	EyeLiner	Debit Card
a01dM00000Y1W5	Swathi	Courier	Nail Polish	UPI
a01dM00000Y1W6	Prasad	Self Pickup	EyeLiner	UPI
a01dM00000Y1W7	Ajay Kumar	Courier	Lip Balm	Debit Card
a01dM00000Y1W9	Sandeep	Courier	EyeLiner	UPI

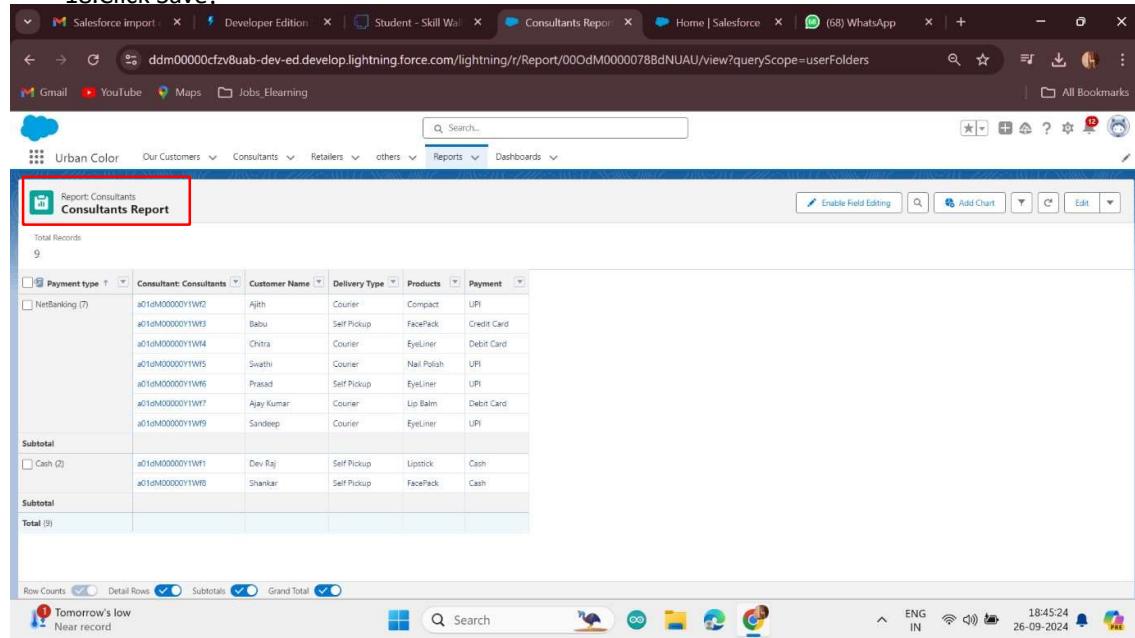
14.In Group Rows Add Payment Type Bucket Field.

15.Click refresh

16.Click Save and Run

17.Give report name – Consultant report

18.Click Save.

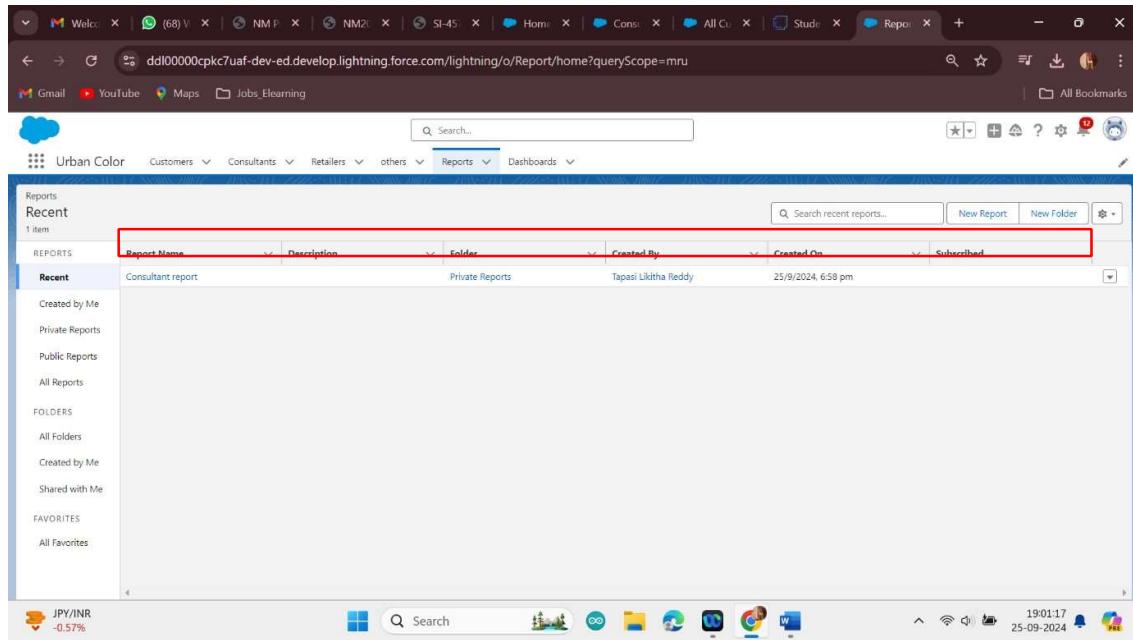


The screenshot shows a web browser window with multiple tabs open. The active tab is titled "Consultants Report". The page content is a table with the following data:

Payment type	Consultant	Customer Name	Delivery Type	Products	Payment
NetBanking (7)	a01dM00000YIW2	Ajith	Courier	Compact	UPI
	a01dM00000YIW3	Babu	Self Pickup	FacePack	Credit Card
	a01dM00000YIW4	Chitra	Courier	Eyeliner	Debit Card
	a01dM00000YIW5	Svathi	Courier	Nail Polish	UPI
	a01dM00000YIW6	Prasad	Self Pickup	Eyeliner	UPI
	a01dM00000YIW7	Ajay Kumar	Courier	Lip Balm	Debit Card
	a01dM00000YIW9	Sandeep	Courier	Eyeliner	UPI
Subtotal					
	a01dM00000YIW1	Dev Raj	Self Pickup	Lipstick	Cash
	a01dM00000YIW8	Shankar	Self Pickup	FacePack	Cash
Subtotal					
Total (9)					

11.2.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

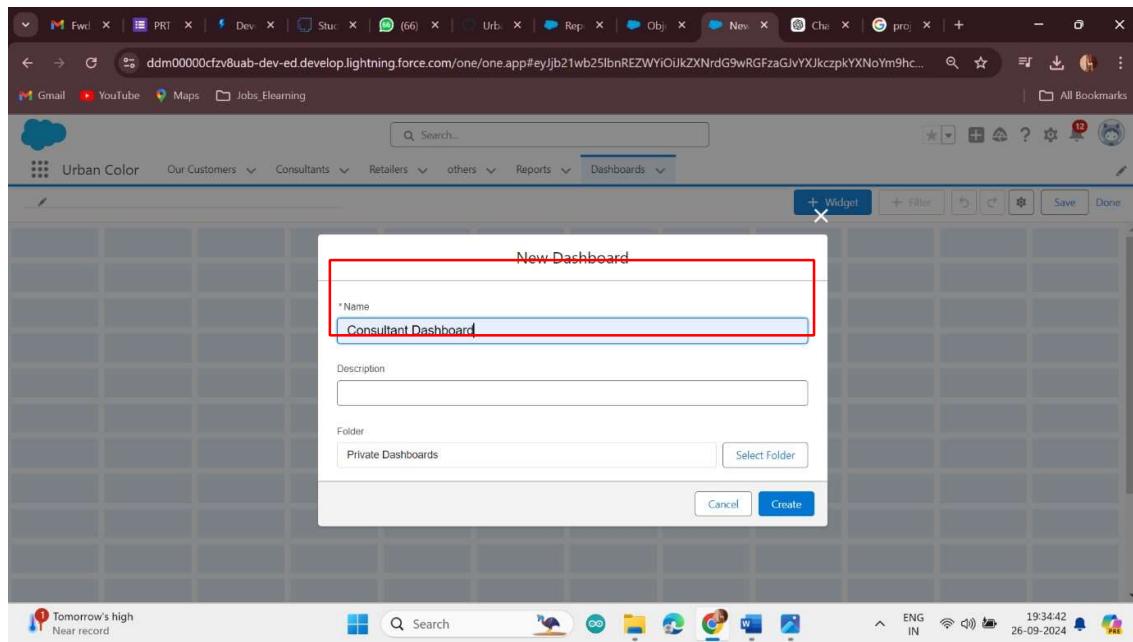


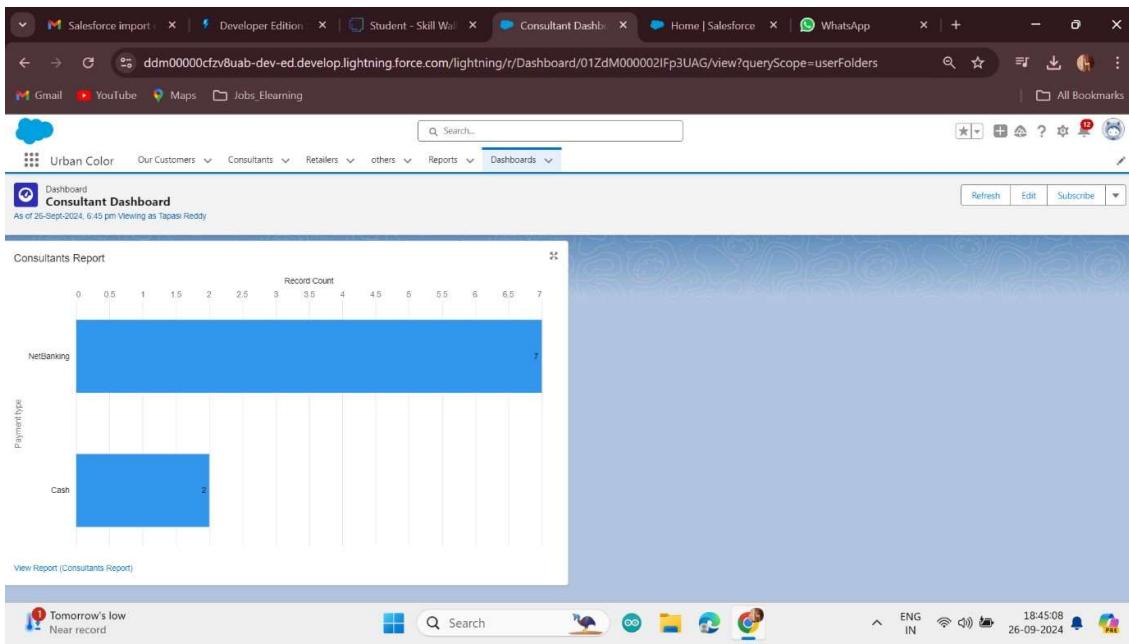
12.Dashboards

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

12.1.Create Dashboard

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.
10. Click save.





12.2. 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

