Cosmetics store management

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Abstract

Cosmetics Store Management in Salesforce is a comprehensive solution designed to empower cosmeticsstores to manage their operations with unparalleled efficiency and effectiveness. Built on the robust Salesforce

platform, this innovative solutionprovides a powerfuland scalable foundation for streamlining customerrelationships, 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 solutionenables 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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Topics

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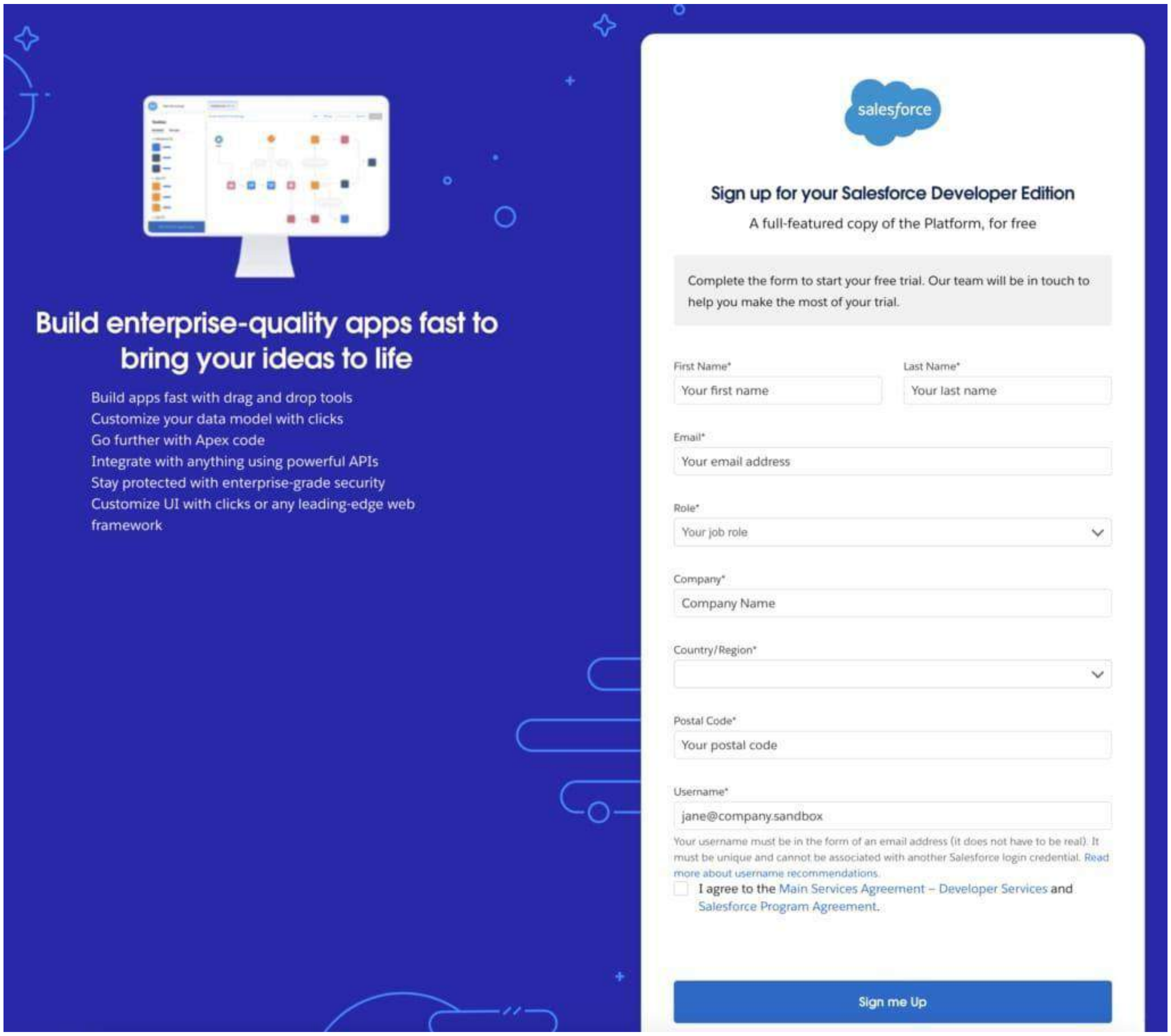
12. Dashboards

1. Creation Salesforce Org

Step-1: Creating a developer org in Salesforce

1. Go to developers.salesforce.com/signup.
2. Click on sign up.
3. On the sign upform, enter the following details :



a. First name & Last name

b. Email

c. Role : Developer

d. Company : CollegeName

e. County : India

a. Postal Code : pin code

b. Username : should be a combination of your name and company.

This need not be an actual email id, you can give anythingin the format : username@organization.com

Step-2: Account Activation

1. Go to the inbox of the email that you used while signingup. Click on the verifyaccount toactivate your account. The email may take 5-10mins.

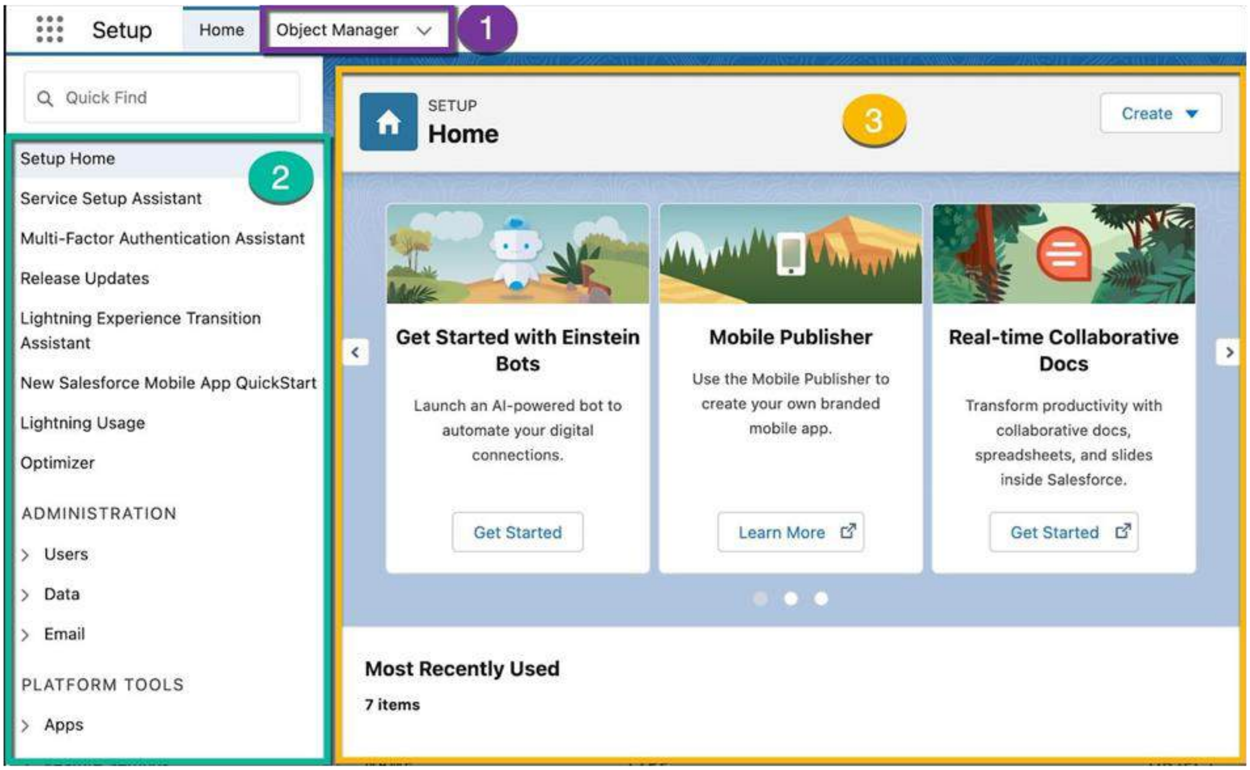
2. Click on verify account.

3. Give a password and answer asecurity question and click on change password.

4. when you will redirectto your salesforce setup page.

Step 3: Login to Your Salesforce Account

1. Go tologin.salesforce.com.
2. Enter your usernameand password created during the sign-up process.
3. Login to access your Salesforce Developeraccount. ■ You will see the home page afterlogging in.


Setup
Home
Object Manager
1
Quick Find
Setup Home
2
Service Setup Assistant
Multi-Factor Authentication Assistant
Release Updates
Lightning Experience Transition Assistant
New Salesforce Mobile App QuickStart
Lightning Usage
Optimizer
ADMINISTRATION
Users
Data
Email
PLATFORM TOOLS
Apps
SETUP
Home
3
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
7 items

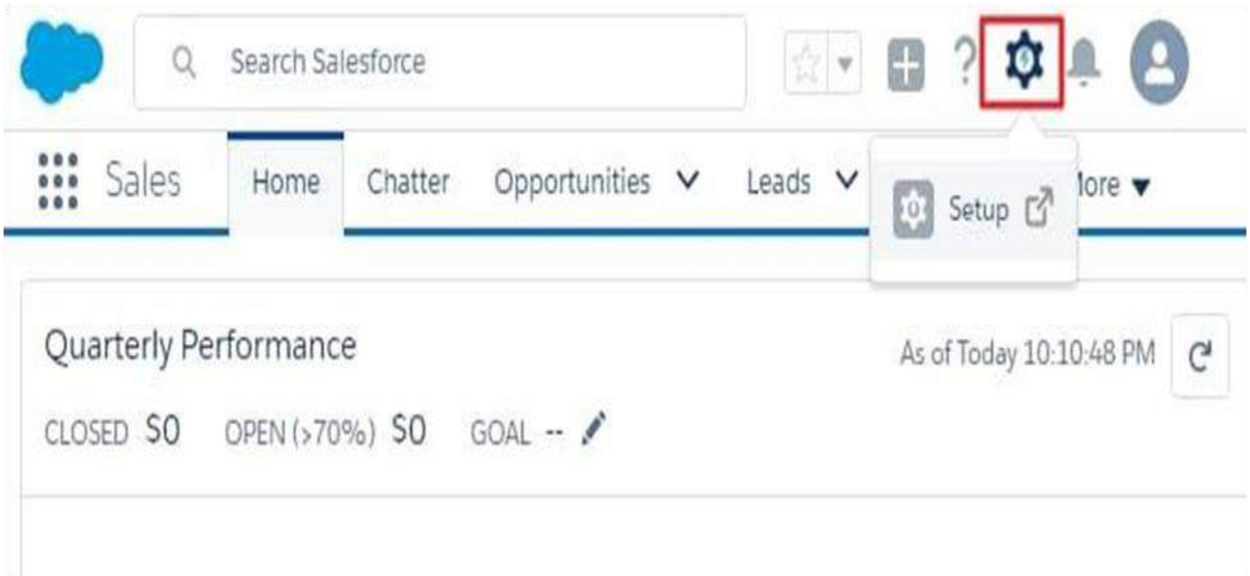
2.Object

What Is an Object?

Salesforce objects are database tables that permit you to store data that is specific to an organization. What are the types of Salesforce objects ?

Salesforce objects are of two types:

1. Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards,etc.
2. Custom Objects: Custom objects are those objects that are created by users. They supply information that is unique and essentialto their organization. They are the heart of any application and provide a structurefor sharing data.



2.1 Create SupplierObject

To create an object:

From the setup page , Click on Object Manager then Click on Create and Clickon Custom Object.

1. Enter the label name then Supplier

2. Plural label name then Suppliers
3. Enter Record Name Label and Format
    a. Record Name then SupplierName
    b. Data Type then Name
4. Click on Allow reportsand Track Field History,
5. Allow search then Save.

2.2 Create Gas Station Object

To create an object:

From the setup page then Click on Object Manager then Click on Create thenClick on Custom Object.

1. Enter the label name then Gas Station
2. Plural label name then Gas Stations
3. Enter Record Name Label and Format
    a. Record Name then Gas Station
    b. Data Type then Auto Number
    c. Display Format then Gas-{000}
    d. Starting number then 1

3.Click on Allow reportsand Track Field History,

4.Allow search then Save.

2.3 Create Buyer and Fuel details Objects

Note: Follow the same steps as mentioned in Activity 2 for the Buyer and Receiptobjects.

1. Use these display formatfor the Buyer
    a. label name then Buyer
    b. Plural label name then Buyers

c. Display Format then Buyer-{000}

d. Starting number then 1

2. Use these display format for the Fuel details

    a. label name then Fuel details

    b. Plural label name then Fuel details

    c. Display Format then fuel-{000}

    d. Starting number then 1

3. Fields And Relationships

Fields and relationships are fundamental components of Salesforce:

Fields:

1. Store data about records(accounts, contacts, opportunities)
2. Types:
    a. Standard fields (pre-defined by Salesforce)
    b. Custom fields (createdby admins)
    c. Formula fields (calculate values based on other fields)

d. Lookup fields (reference other objects)

3. Field types:

    a. Text

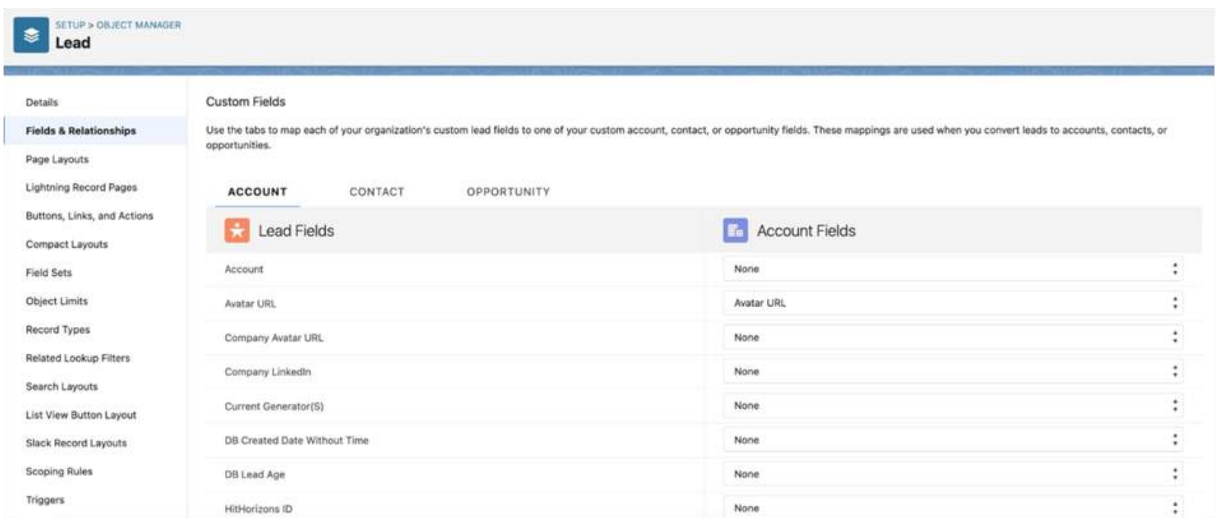
    b. Number

    c. Date

    d. Checkbox

    e. Picklist

    f. Multi-select picklist



Relationships:

1. Define connections between objects (accounts, contacts, opportunities)

2. Types:

    a. Master-Detail (parent-child)

    b. Lookup (reference another object)

    c. Many-to-Many (junction object)

3. Relationship fields:
    a. Lookup fields
    b. Master-Detail fields

Salesforce Tools:

1. Object Manager: manageobjects and fields
2. Field Editor: create and edit fields
3. Relationship Editor: establish relationships
4. Schema Builder:visualize object relationships
5. Data Loader: import and export data

Understanding fields and relationships is crucial for effective Salesforce management. Properly designing and managing these components enables:

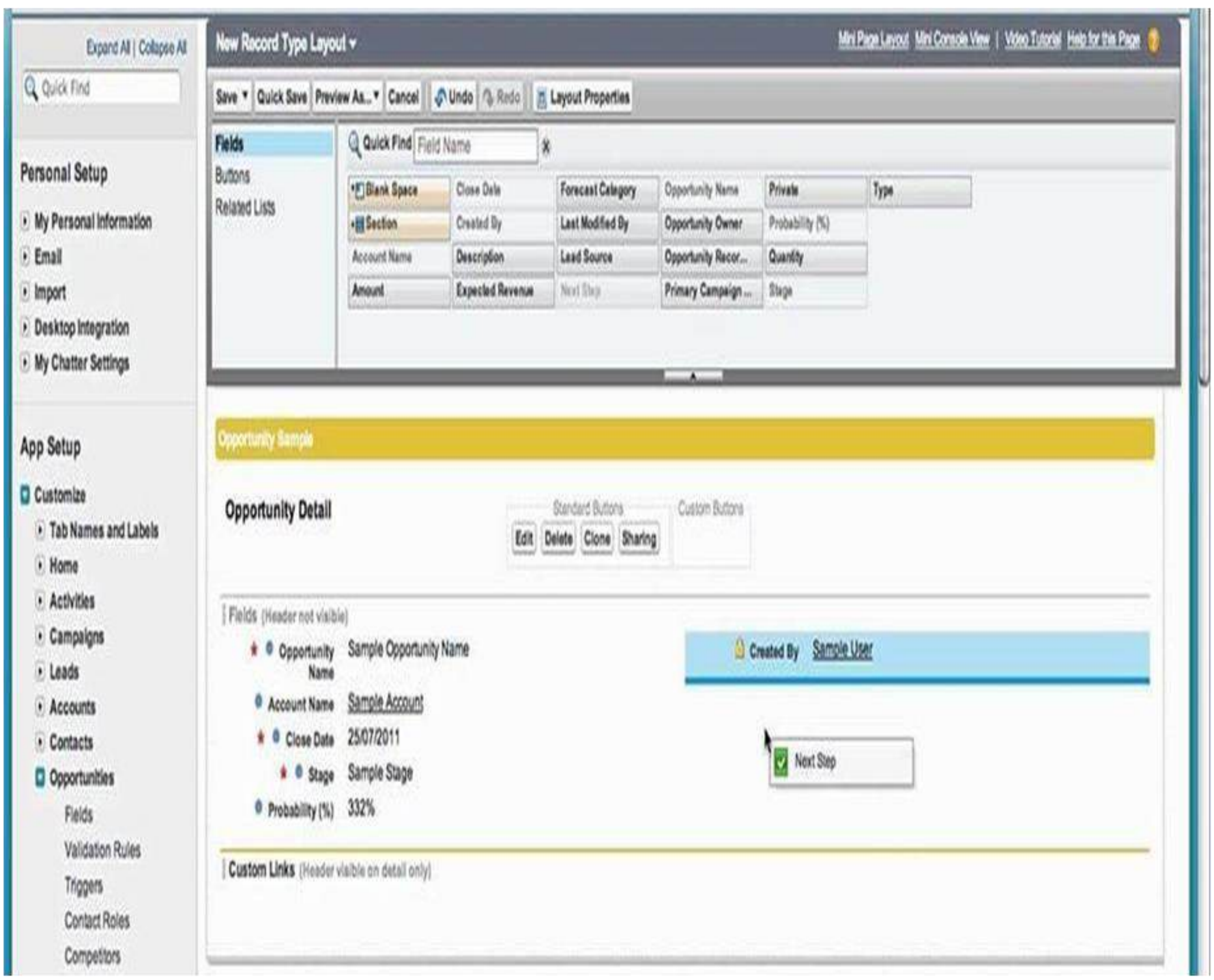
1. Efficient data management
2. Improved data integrity
3. Enhanced reporting and analytics
4. Streamlined automation and workflows
5. Better decision-making

4. Page Layouts

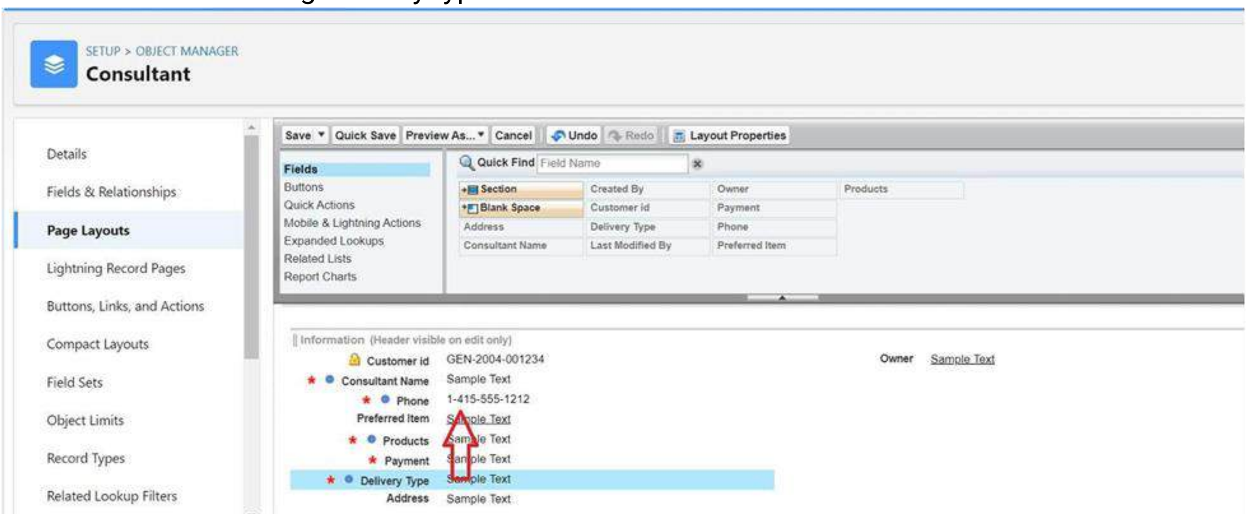
a. From the Salesforce setup menu, go to "Object Manager" and selectthe Consultants object.

b. Click on "Page Layouts" in the left sidebar. This will displaya list of available pagelayouts for the selected object.

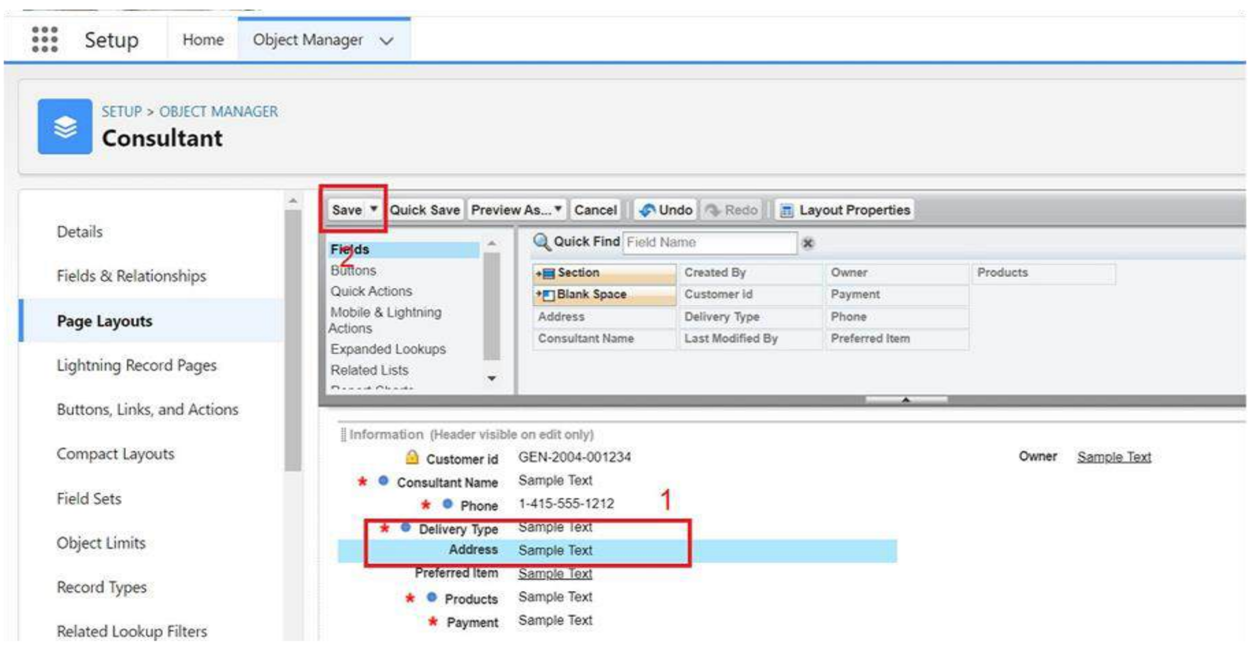
c. Select the Consultant Layout page layout.



d. Click And Drag Delivery type and Address Fields BelowPhone field.



e. Click on save



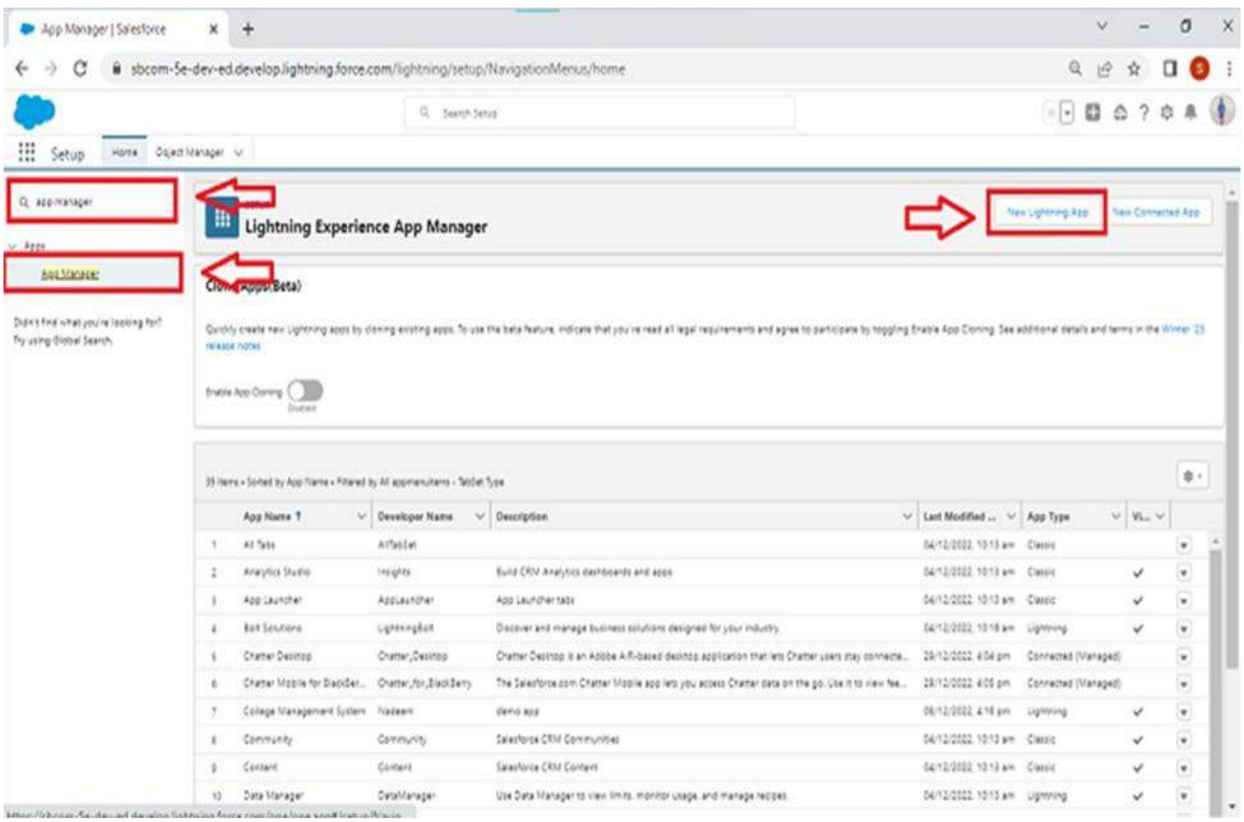
5. The Lightning App

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.

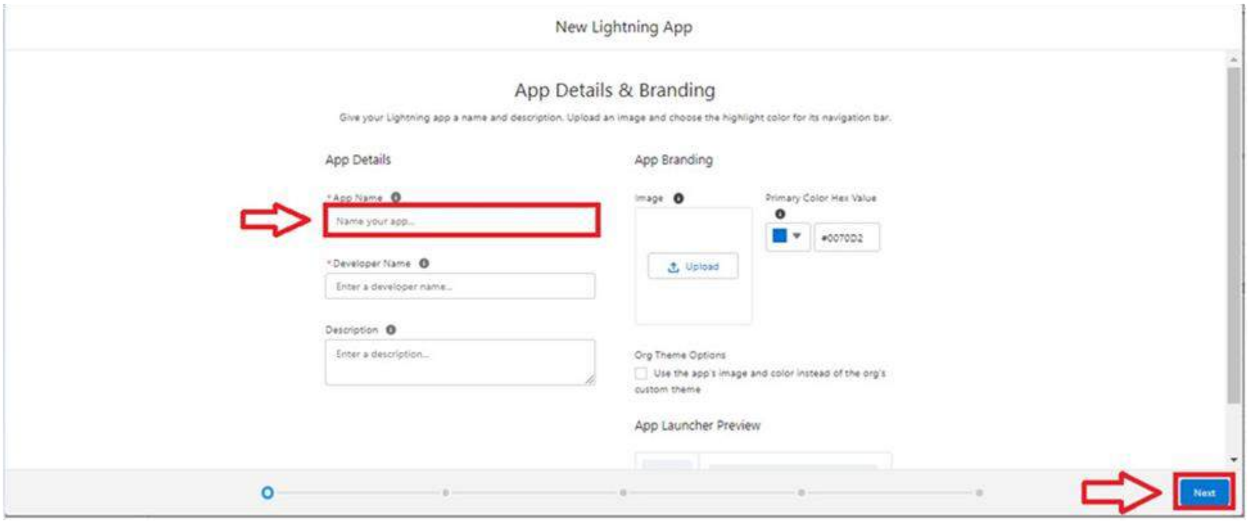
Lightning apps let you brand your apps with a custom Color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your org can work more efficiently by easily switching between apps.

To create a lightning app page:

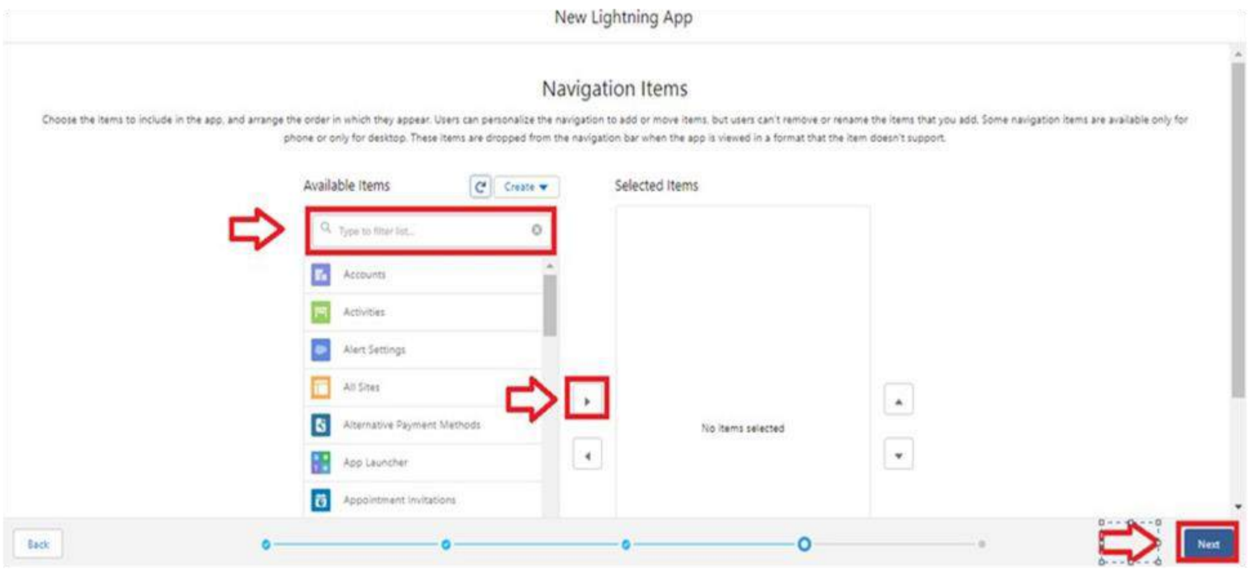
1. Go to setup page --> search “app manager” in quick find --> select “app manager” -->click on New lightning App.



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



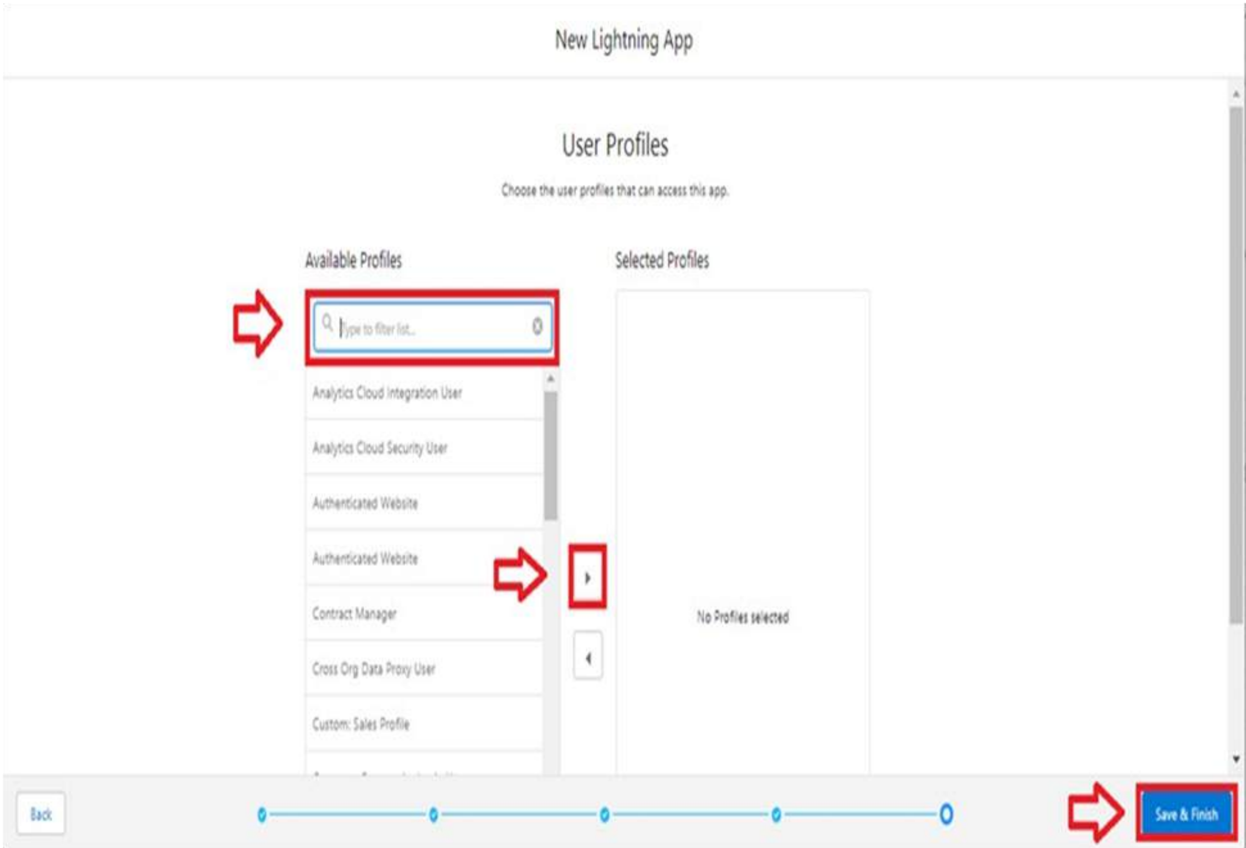
3. To Add Navigation Items:



4 .Select the items (Our Customers, Consultants, Retailers, Others, Reports,Dashboards) fromthe 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.


New Lightning App
User Profiles
Choose the user profiles that can access this app.
Available Profiles
Selected Profiles
Type to filter list...
Analytics Cloud Integration User
Analytics Cloud Security User
Authenticated Website
Authenticated Website
Contract Manager
Cross Org Data Proxy User
Custom: Sales Profile
No Profiles selected
Back
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.

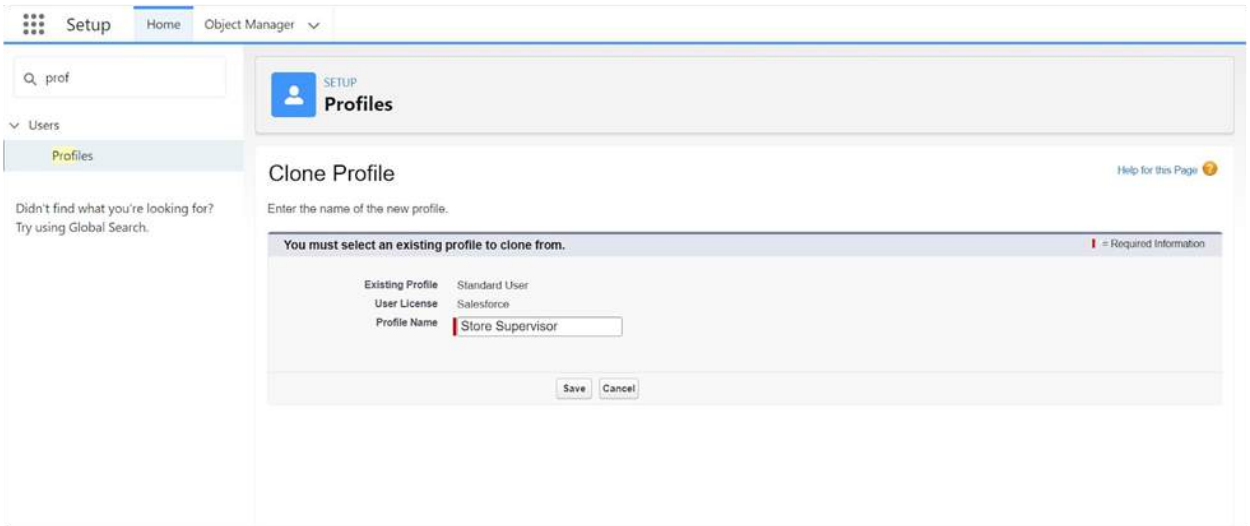
Creating a Profiles

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

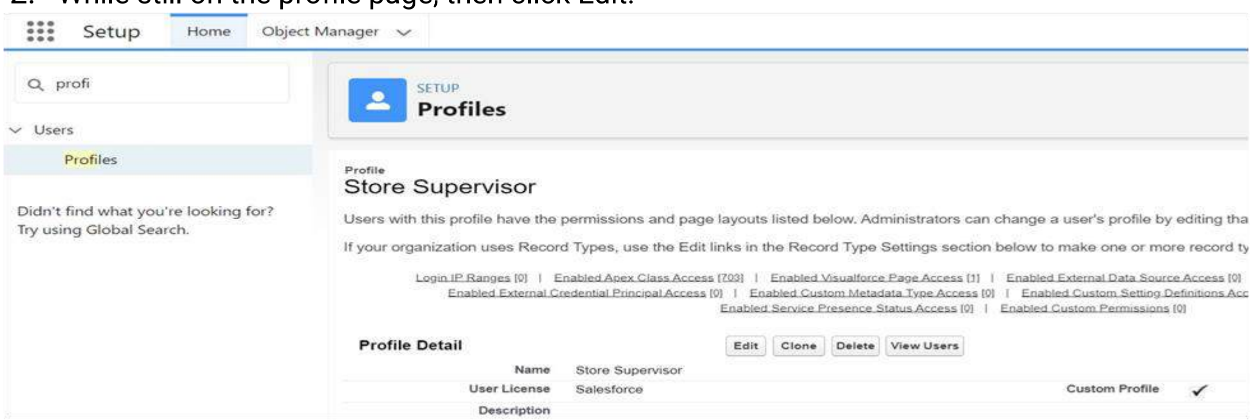
- From Setup enterProfiles in the Quick Find box, and select Profiles.
- From the list of profiles, find Standard User.
- Click Clone.
- For Profile Name, enter Store Supervisor.
- Click Save.
- While still on the Store Supervisor profile page, then click Edit.
- Scroll down to Custom Object Permissions and give accessforCreate,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.

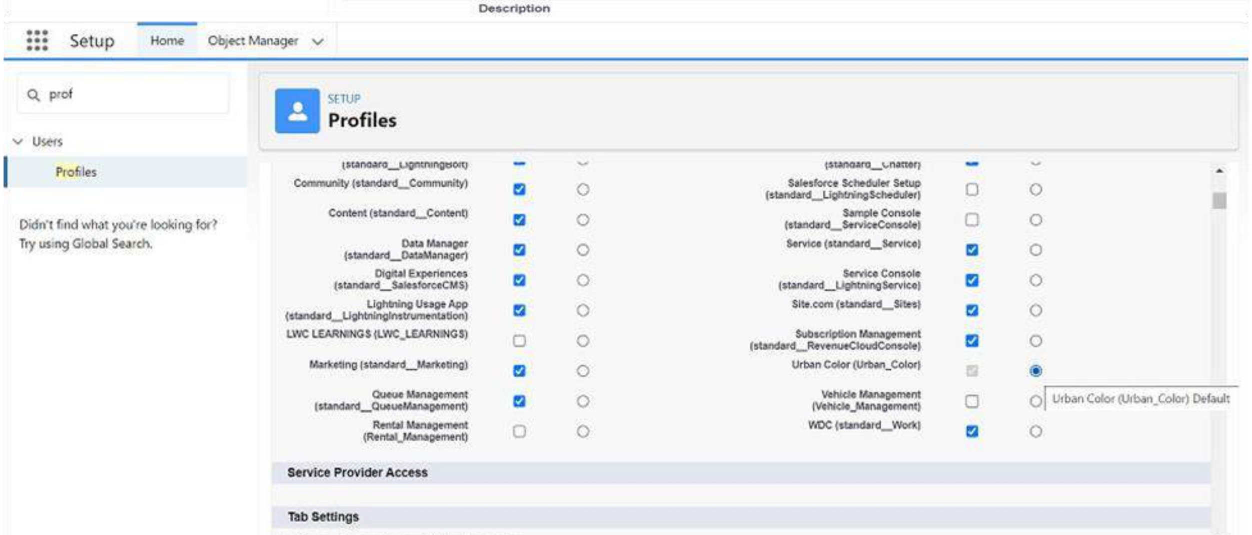
To createa new profile:

1. Go to setup--> type profiles in quick find box--> click on profiles -->clone the desiredprofile(standard user is preferable) --> enter profile name --> save.

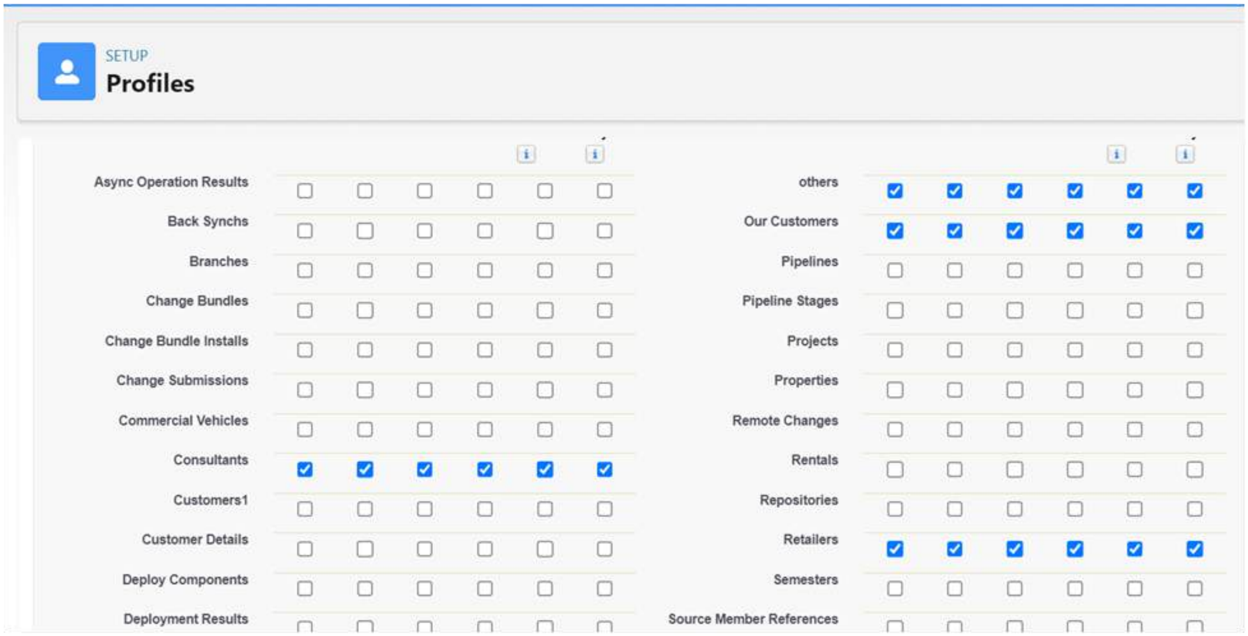


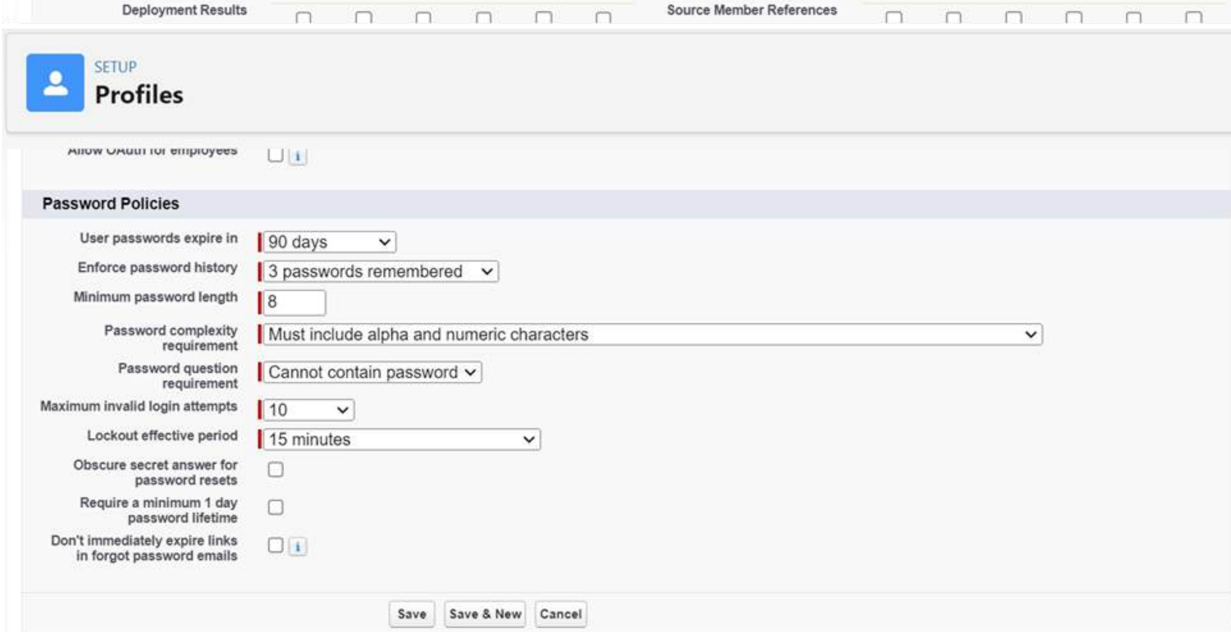
2. While still on the profile page, then click Edit.





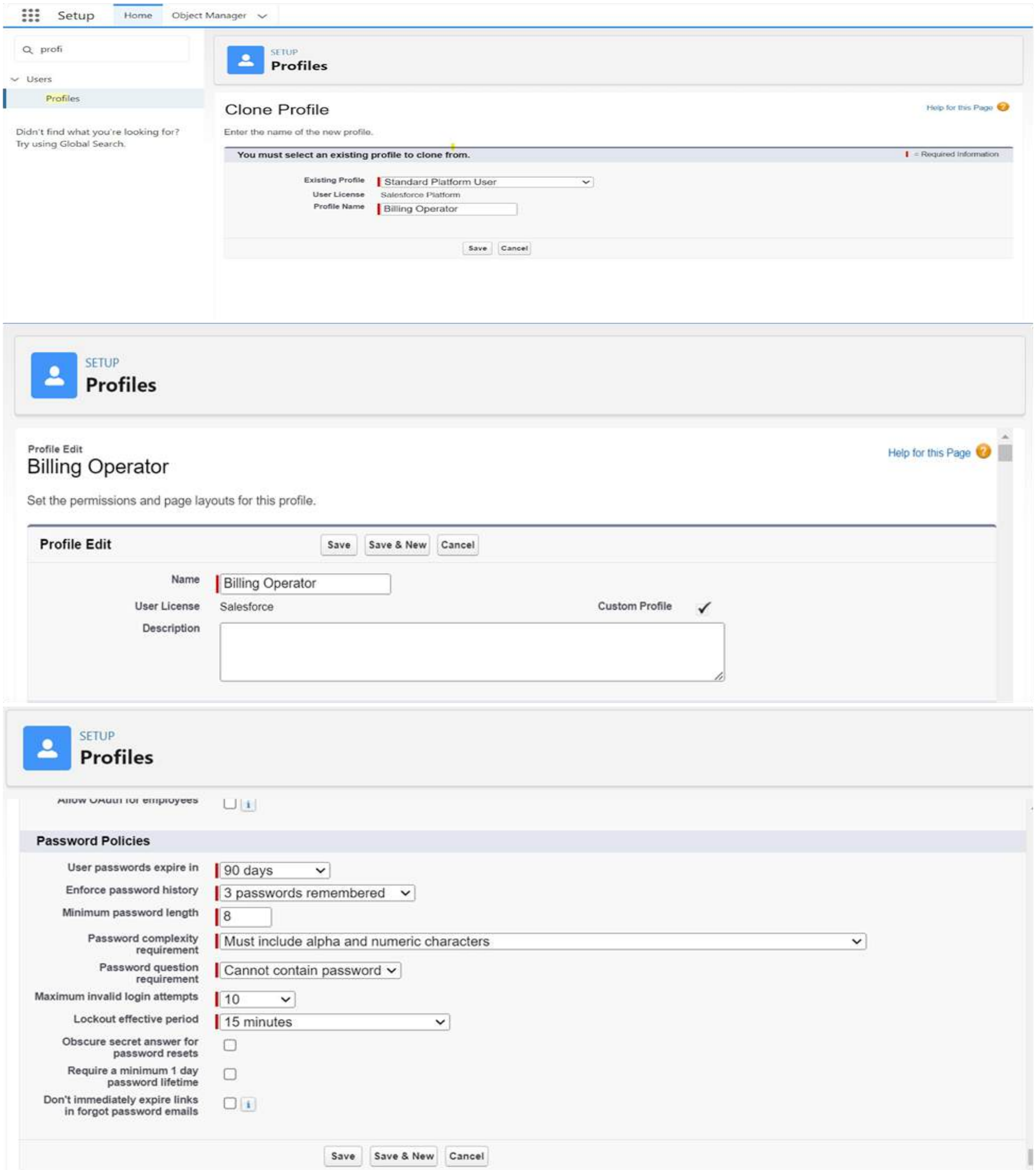
3. Scroll down to the Custom object permission and give all access to the Consultants, Others,Our Customers, Retailers object.





4. Click on Save.

5. Similarly Create operator Profile, Clone Salesforce Platform user and give accessonly forBillingOperator.



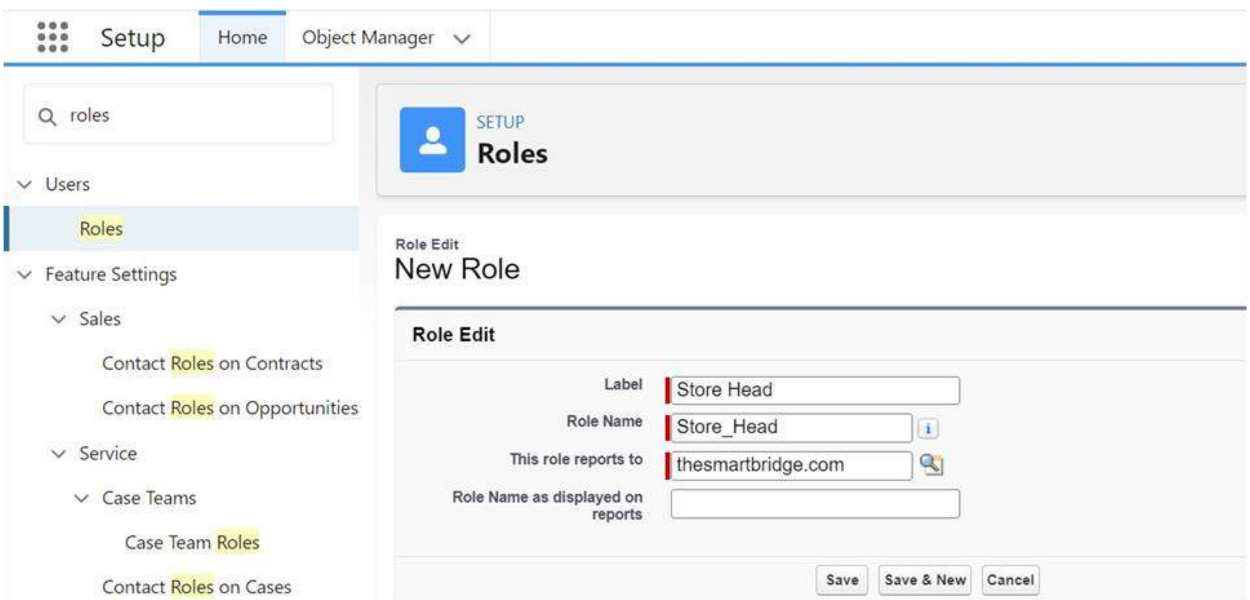
4. Click On Save

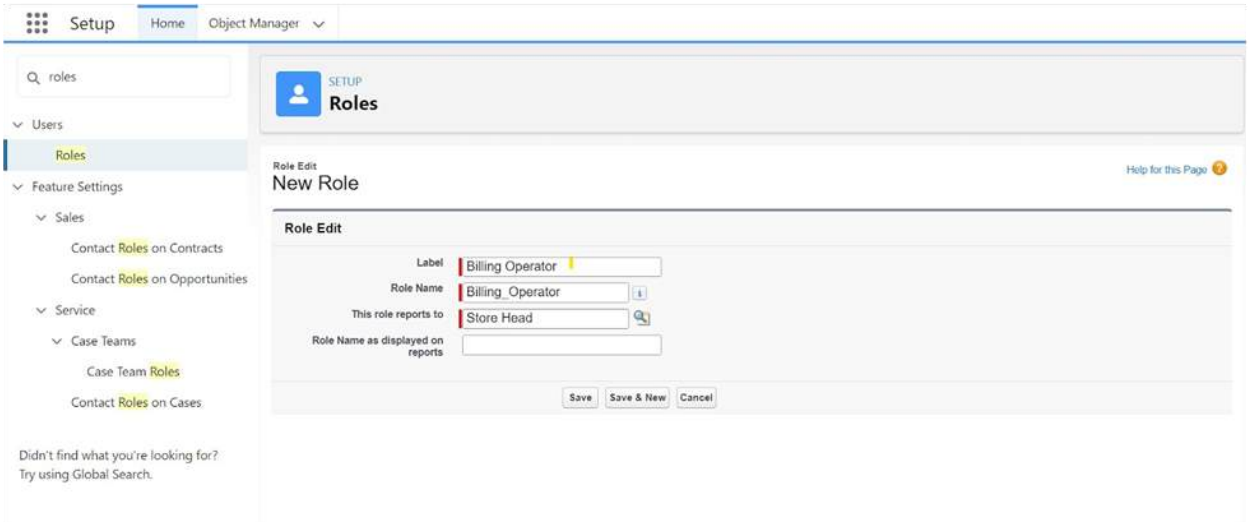
7. Setup Roles

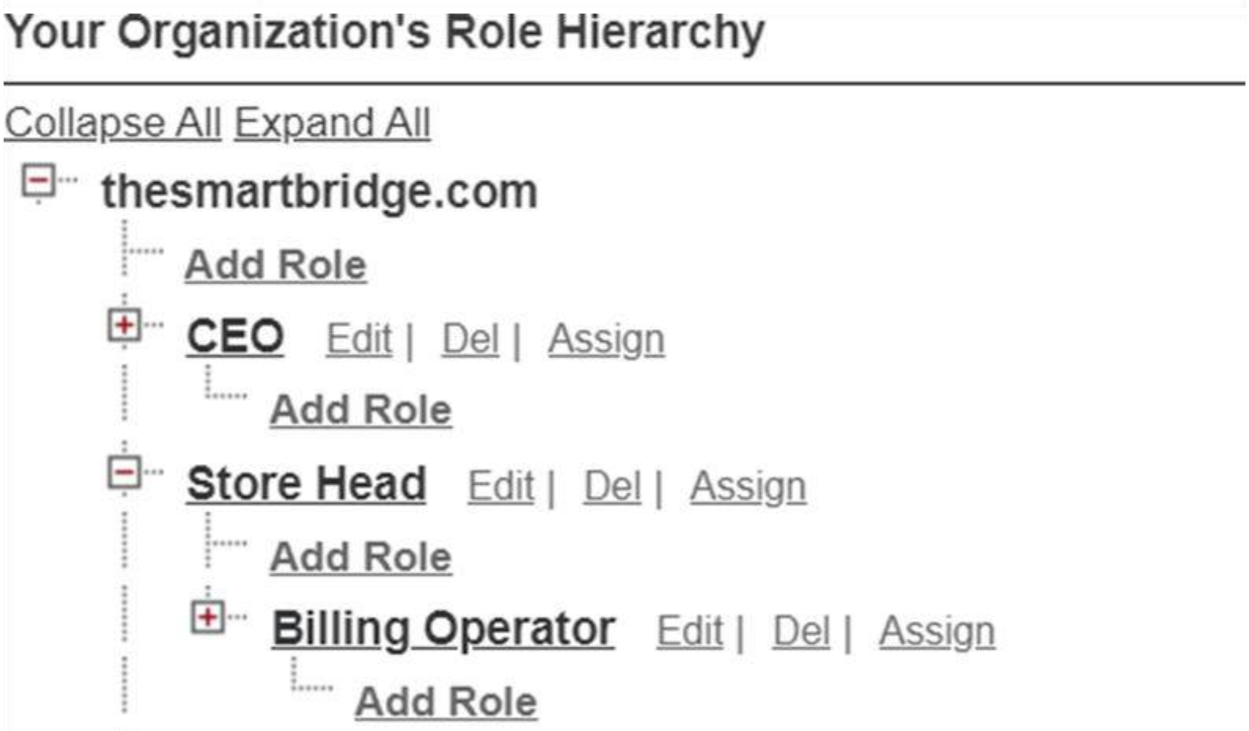
Roles are record-level accesscontrols that define what data a user can see in Salesforce.

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 Labelas 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 StoreHead as Billing Operator.




Setup
Home
Object Manager
roles
Users
Roles
Feature Settings
Sales
Contact Roles on Contracts
Contact Roles on Opportunities
Service
Case Teams
Case Team Roles
Contact Roles on Cases
Didn't find what you're looking for? Try using Global Search.
SETUP
Roles
Role Edit
New Role
Help for this Page
Role Edit
Label
Billing Operator
Role Name
Billing_Operator
This role reports to
Store Head
Role Name as displayed on reports
Save
Save & New
Cancel


Your Organization's Role Hierarchy
Collapse All Expand All
thesmartbridge.com
Add Role
CEO Edit | Del | Assign
Add Role
Store Head Edit | Del | Assign
Add Role
Billing Operator Edit | Del | Assign
Add Role

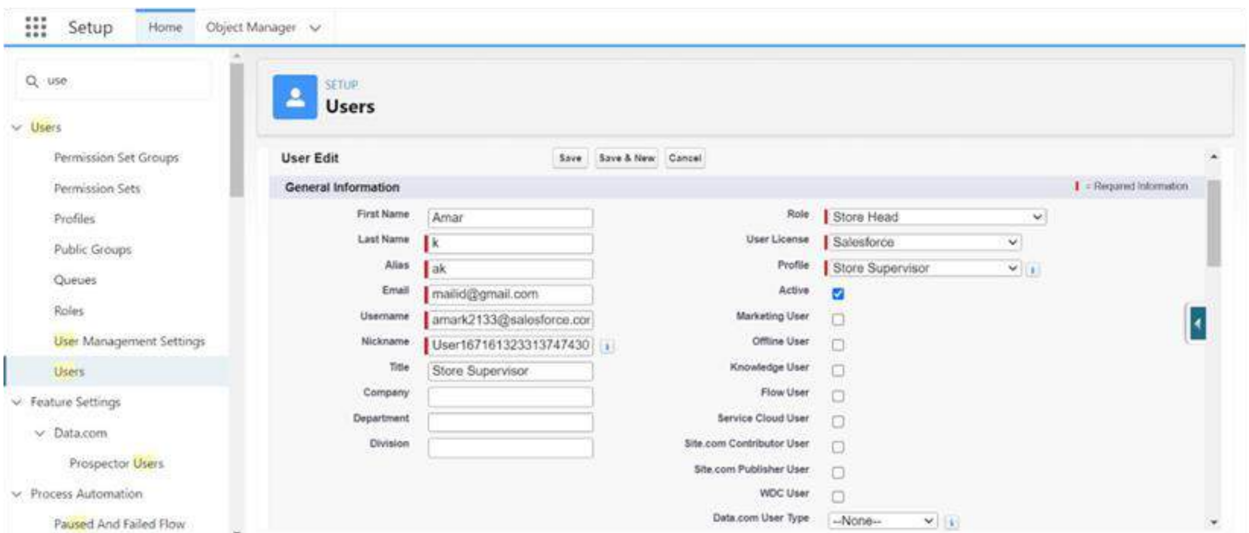
8. Users

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

Creating a Users:

a. From Setup,in the Quick Find box, enter Users,and then selectUsers.
b. Click New User.
c. Enter the user's name Amar K and (Your) email address and a unique username in the form of an email address.By default, theusername is thesame as the email address.
d. Select a Role(Store Head)
e. Select a User LicenceAs Salesforce.
f. Select a profile as Store Supervisor.
g. Check Generatenew password and notify the user immediately
   to have the user's login name and a temporary password emailedto your email.

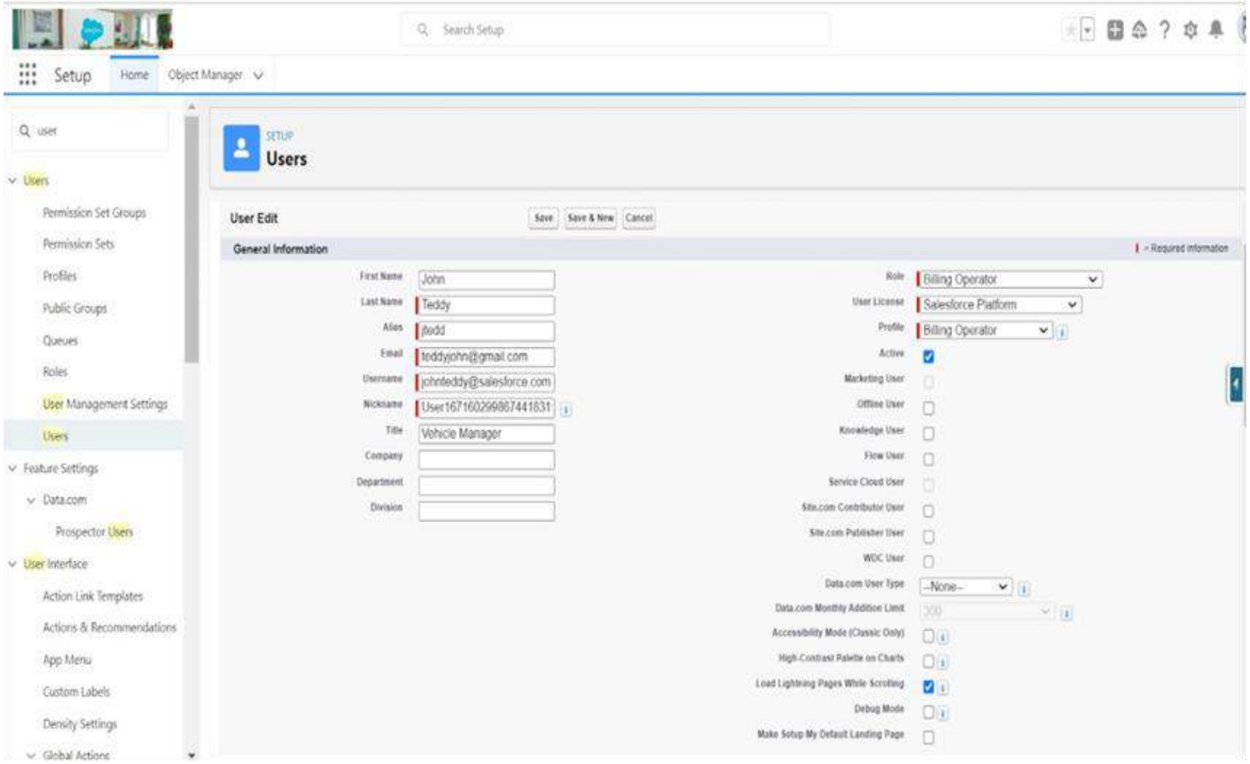
Fill in the fields(first name, last name, alias,email id, username, nick name, role,user licence, profiles) --> save.

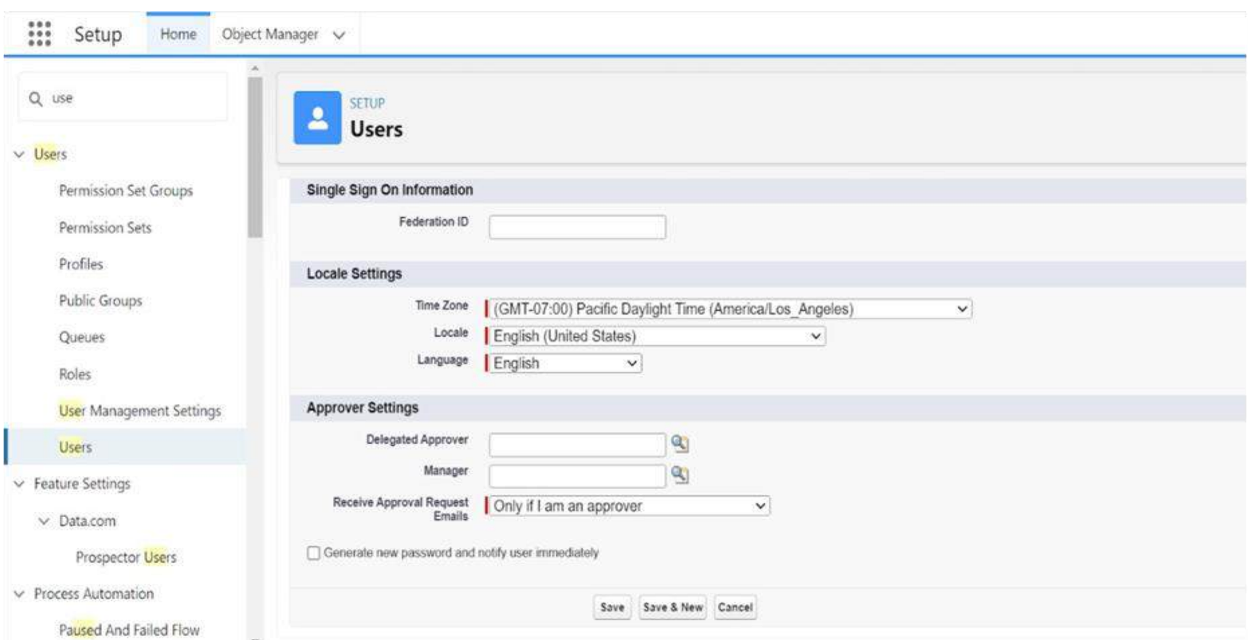


Second User Creation

1. From Setup, in the Quick Find box, enter Users, and then select Users.
2. Click New User.
3. Enter the user's name 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 emailedto your email.

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





9. User Adoption

We need to understand user adoption and navigation. How to interactwith database and theirrecords.

Create Our Customer Record

a. Click on App Launcheron left side of screen.

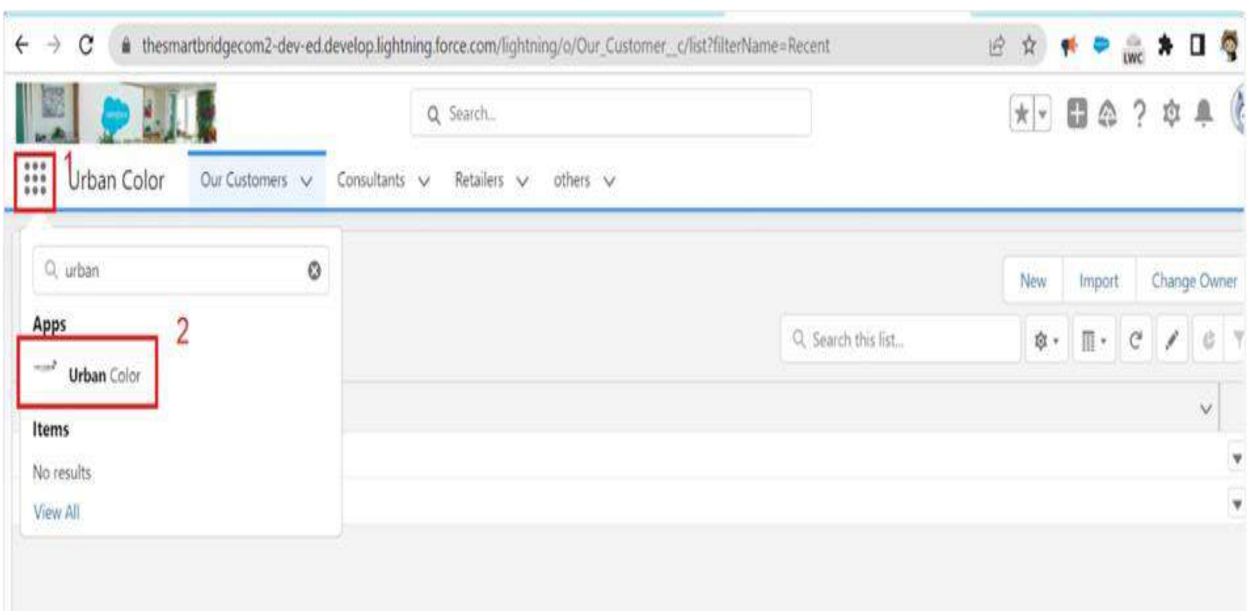
b. Search UrbanColor & click on it.

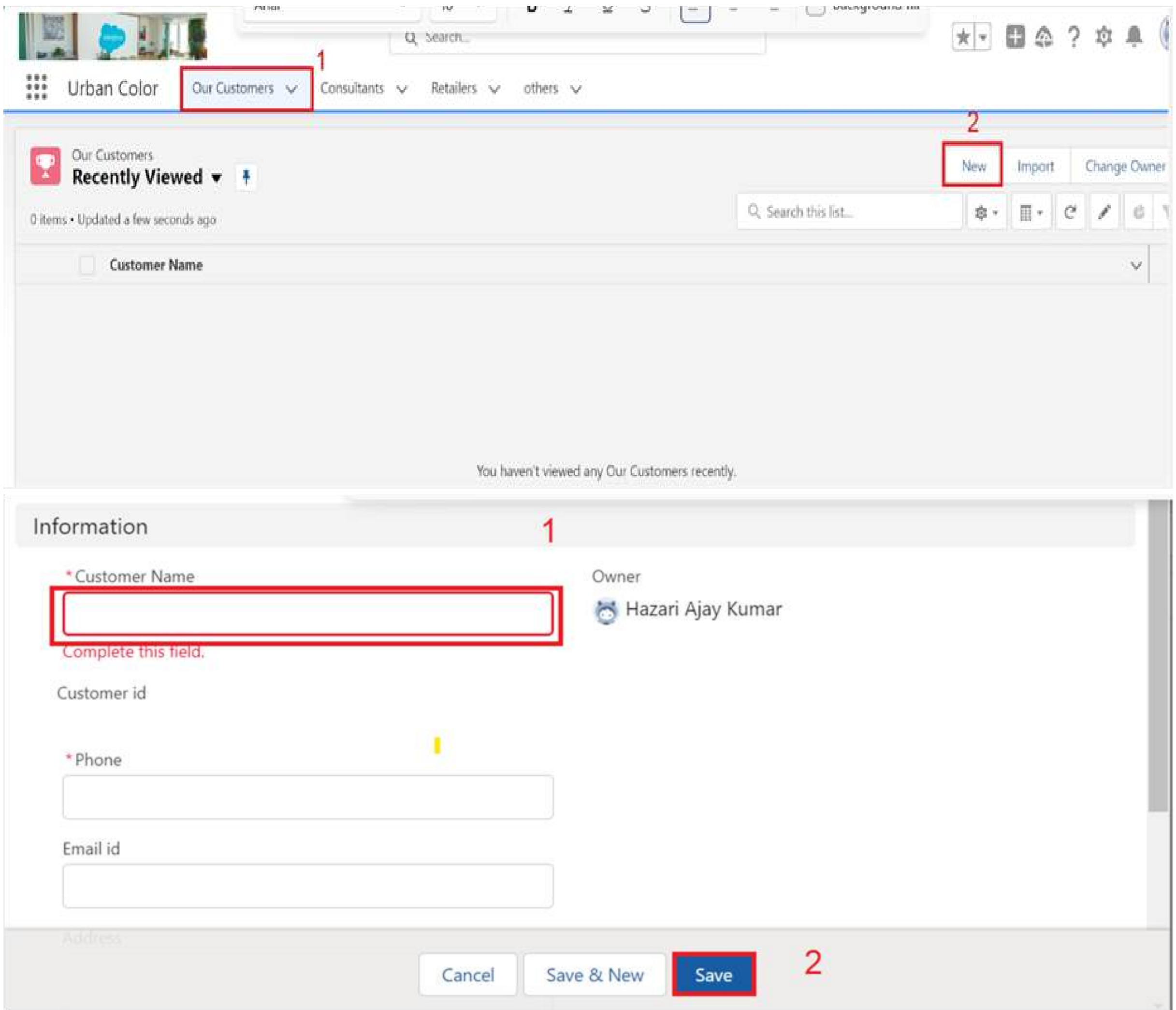
c. Click on OurCustomer tab.

d. Click new button

e. Fill all Our Customerrecord details.

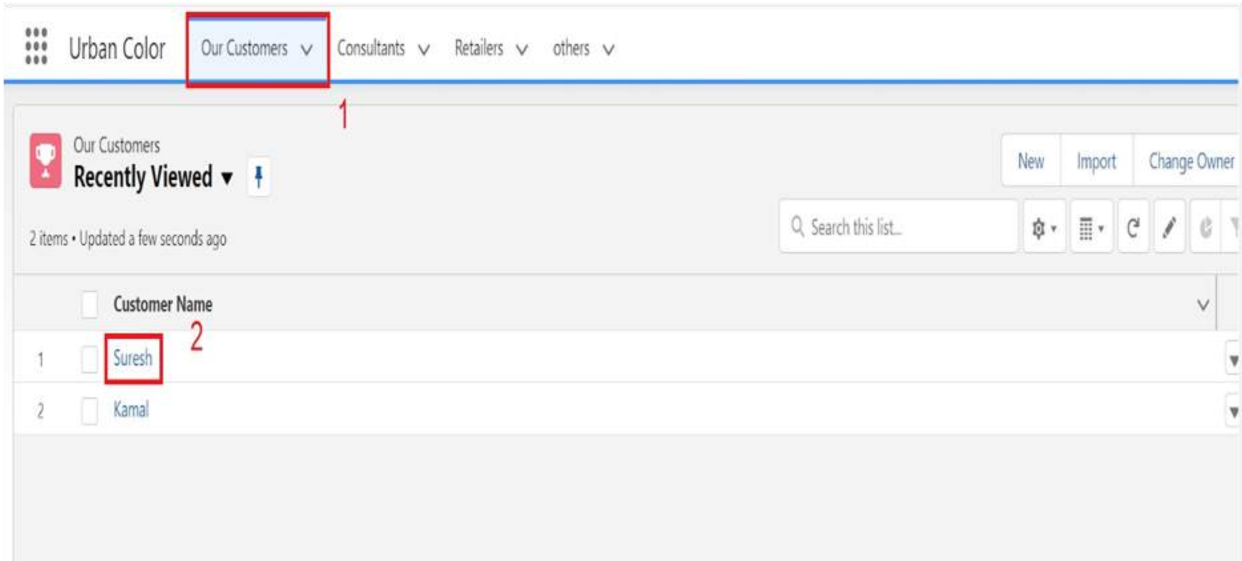
f. Click on SaveButton

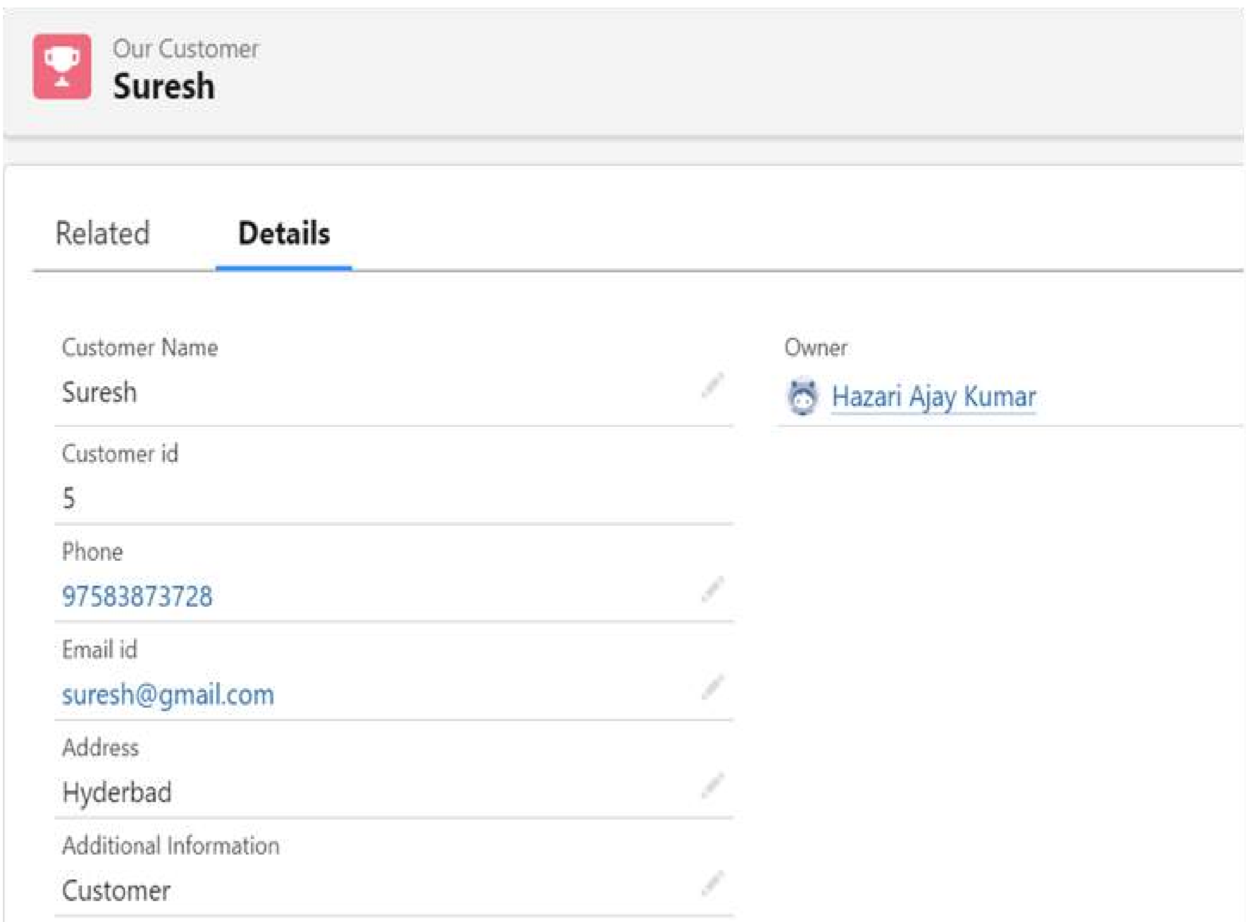




View Record (Our Customer):

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 recordname. you can see the details of the OurCustomer

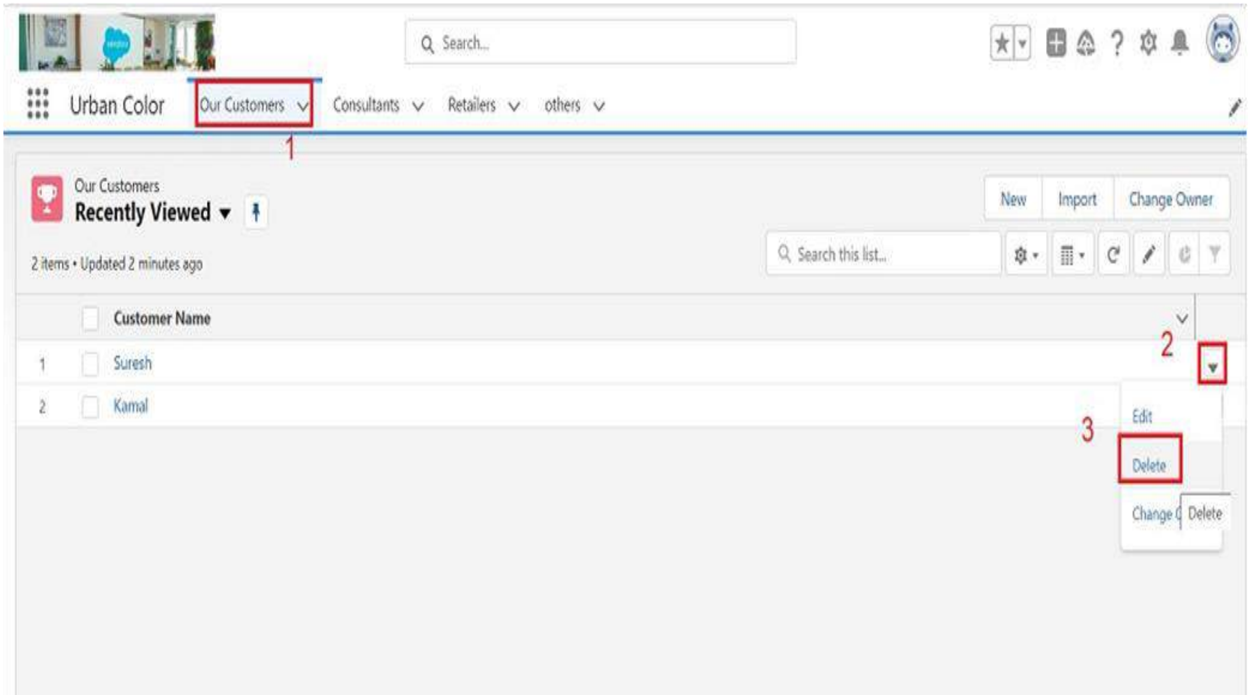




Delete Record (Our Customer)

Delete Record(Our Customer):

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

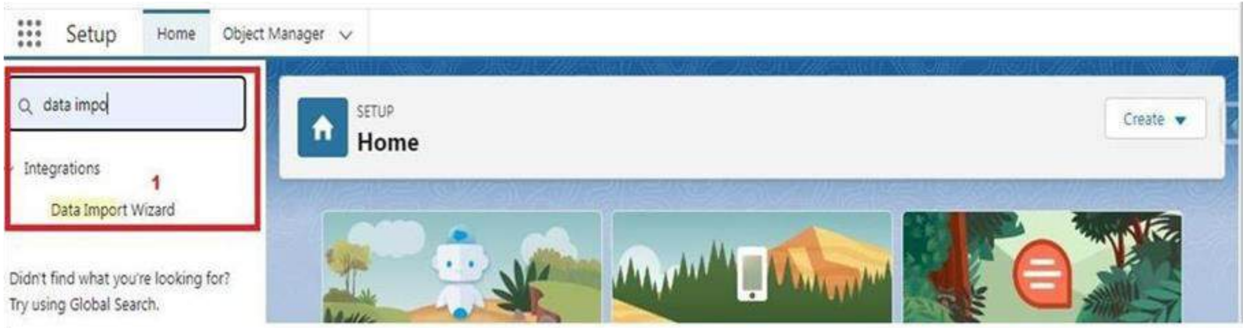


10. Import Data

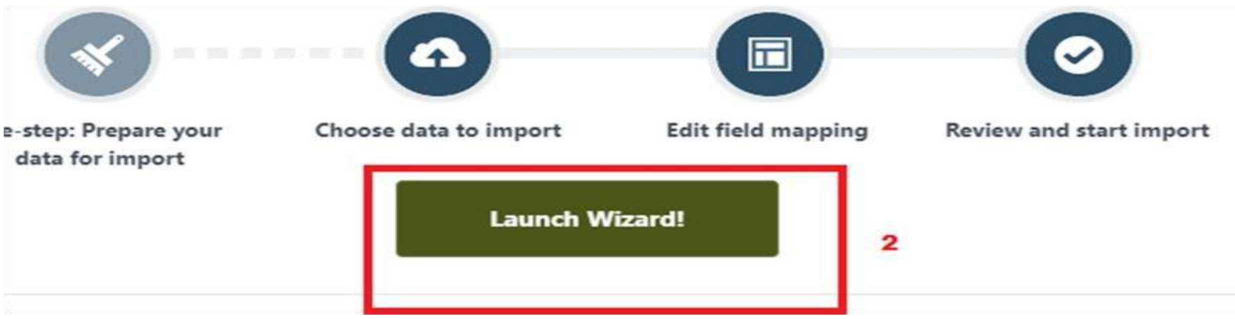
Data ImportWizard—this tool, accessible through the Setup menu, lets you importdata in common standard objects,such as contacts, leads, accounts, as well as data incustom objects.

To Import Data

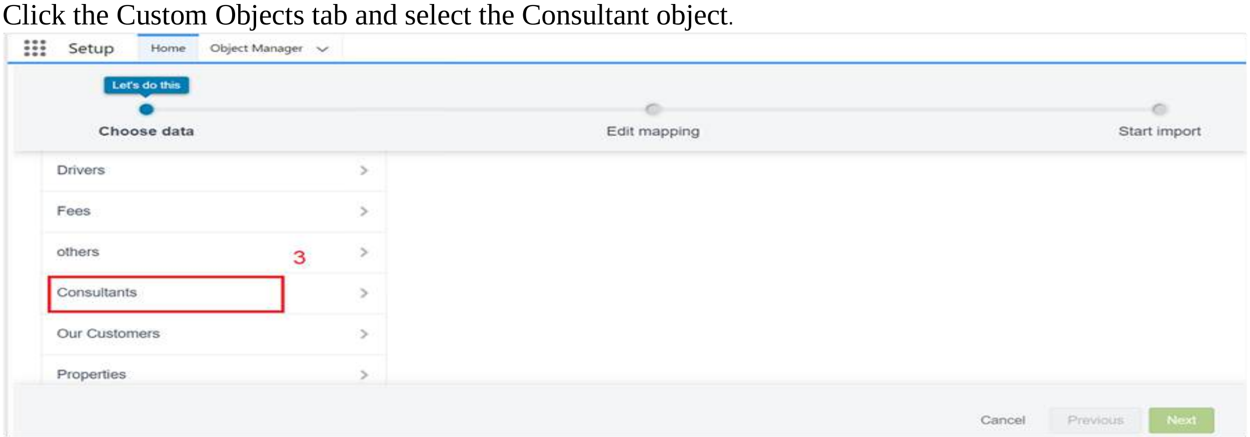
1. From Setup, click the Home tab.
2. In the Quick Find box, enter Data Importand select Data Import Wizard



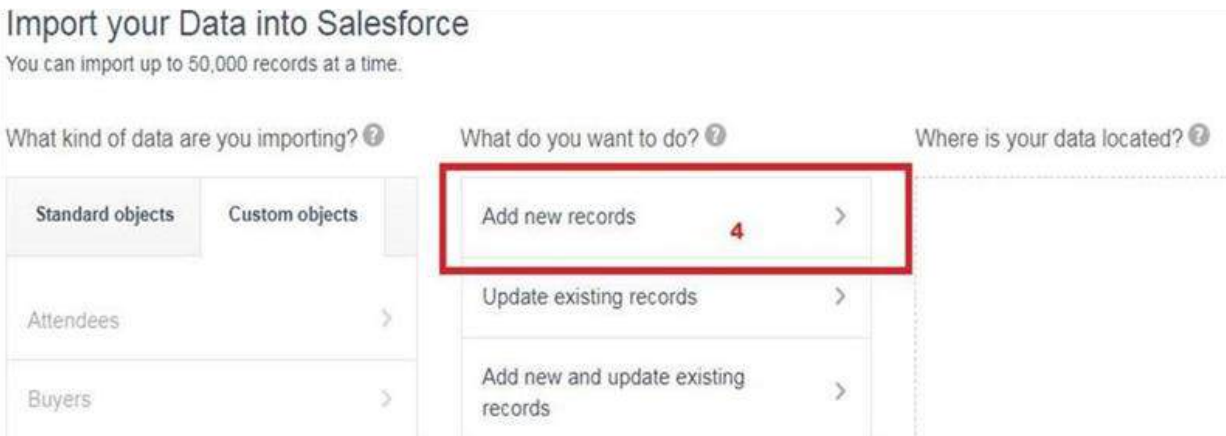
3. Click Launch Wizard!



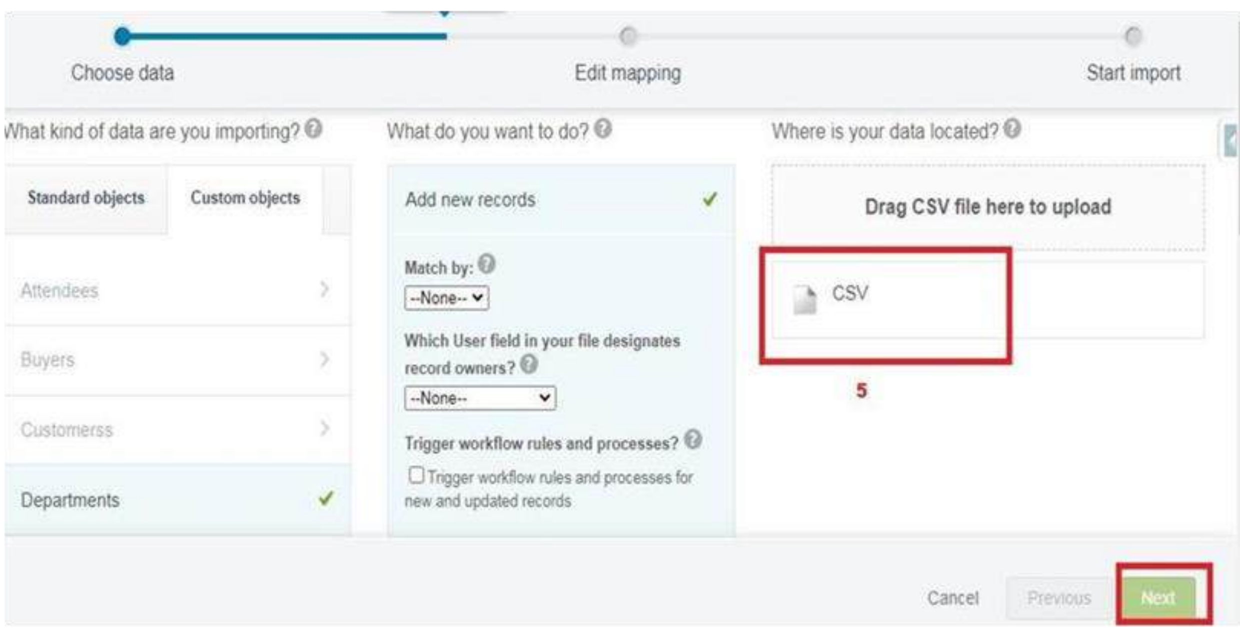
4. Click the Custom Objects tab and select the Consultant object.



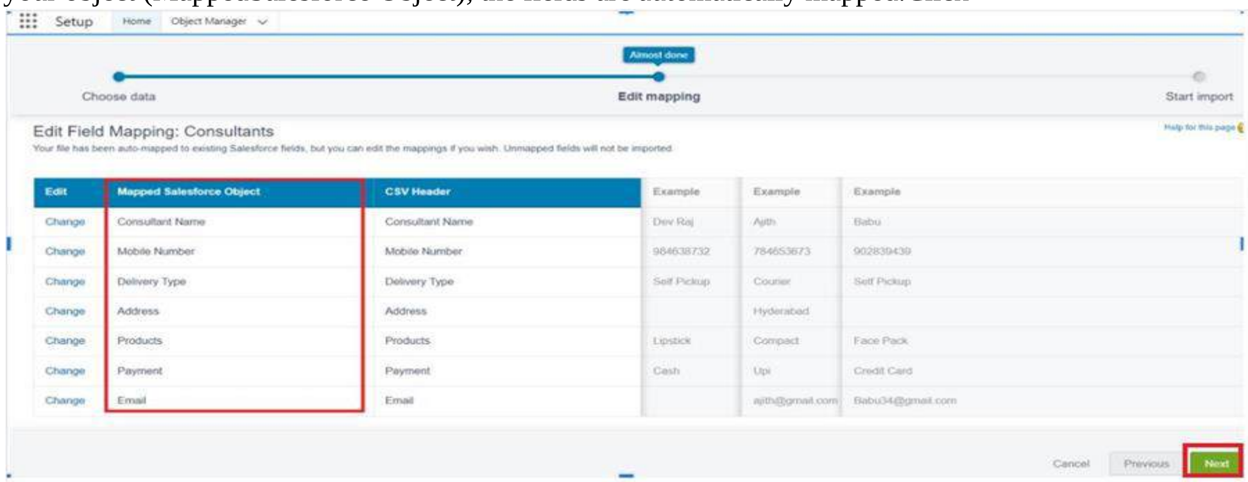
5. Select Add new records.



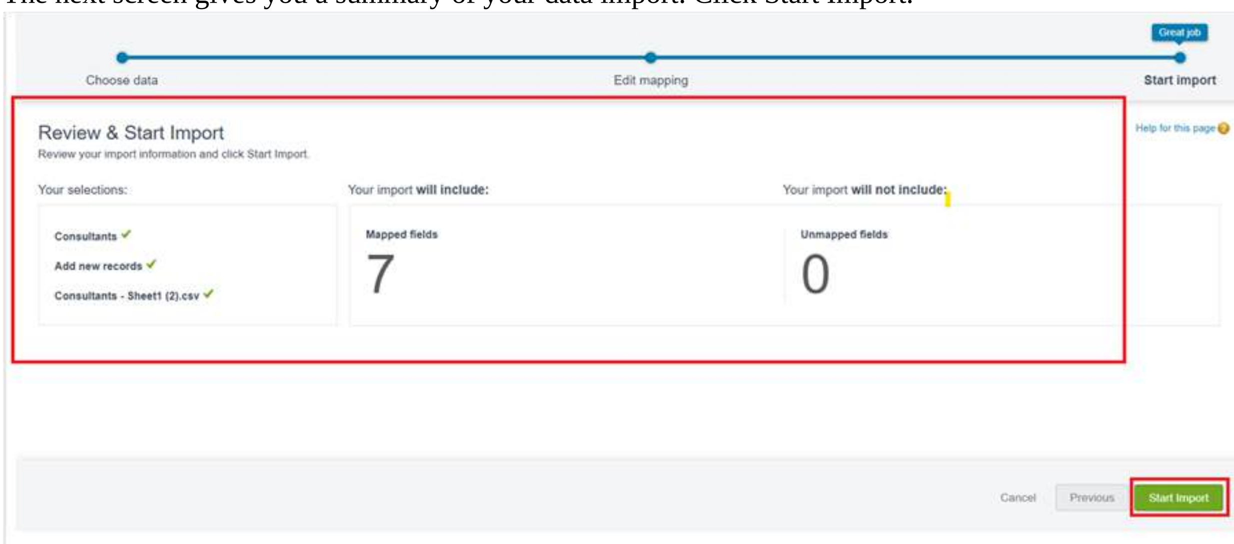
6. Click CSV and choose file Consultant_CSV which we made earlier. Click Next.



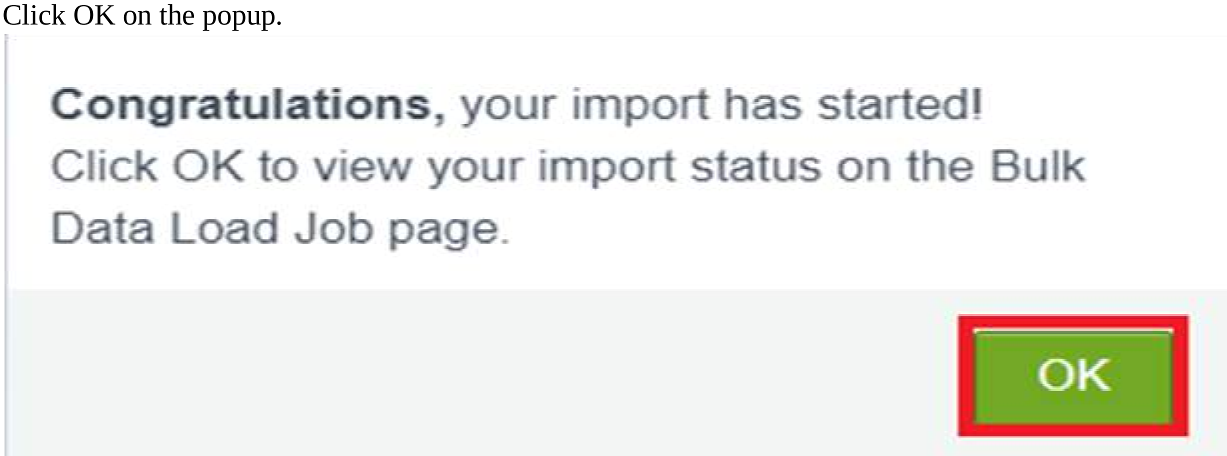
7. Since the field names in the CSV file (CSV Header) are the same as the field names in your object (MappedSalesforce Object), the fields are automatically mapped.Click



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



9. Click OK on the popup.



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

Batches

View Request	View Result	Batch ID	Start Time	End Time	Total Processing Time (ms)	API Active Processing Time (ms)	Apex Processing Time (ms)	Records Processed	Records Failed	Retry Count	State Message	Status
View Request	View Result	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 Fieldmapping carefully.

11. Reports

Reports in Salesforce is a listof records that meet a particular criterion which gives an answer toa particular question. These recordsare displayed as a table that can be filteredor grouped basedon any field.

There are 4 typesof report formatsin 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 inDashboards. They are mainlyused to generate a simple list or a listwith a grand total.
2. Summary Reports:
   It is the most commonly used type of report. It allows groupingof rows of data, viewsubtotal, 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 columnsand rows. It can also be used togenerate dashboards. Charts can be added to this type of report.
4. Joined Reports:
   These types of reports let us createdifferent views of data from multiplereport types. Thedata 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.

Create Report

1.Click App

Launcher 2.Select

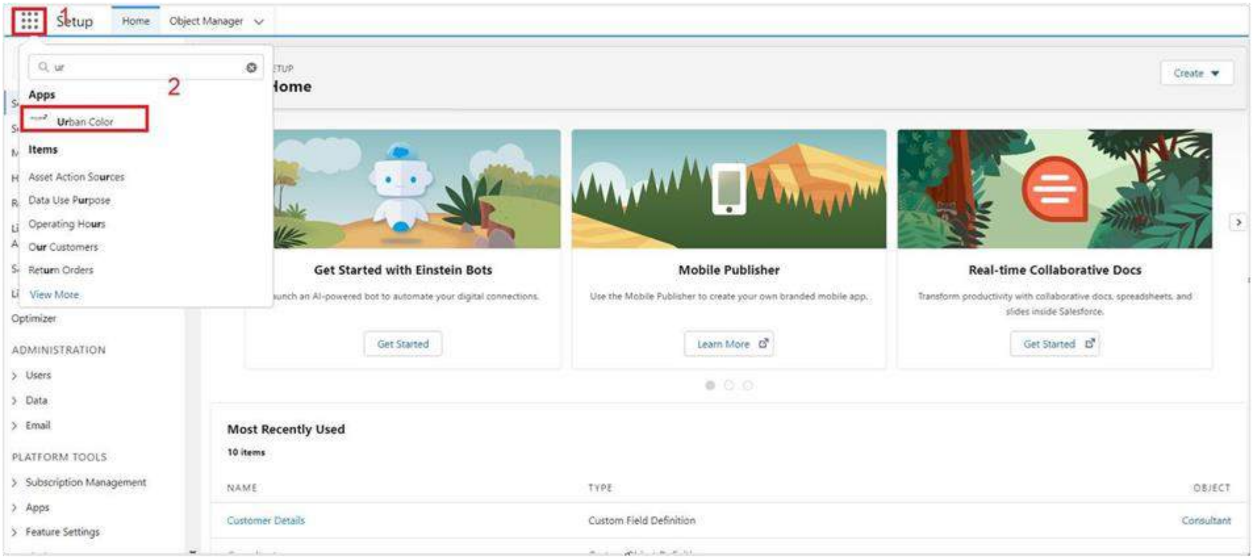
Urban Color App

3.Click reports tab

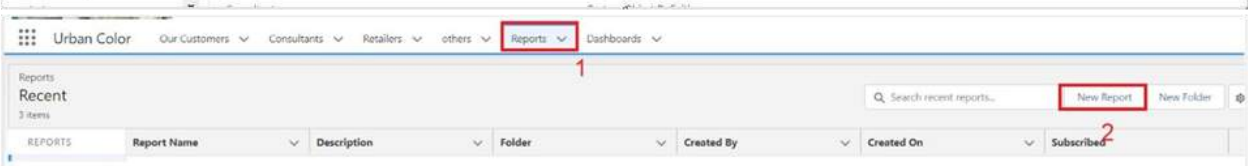
4.ClickNew

Report.

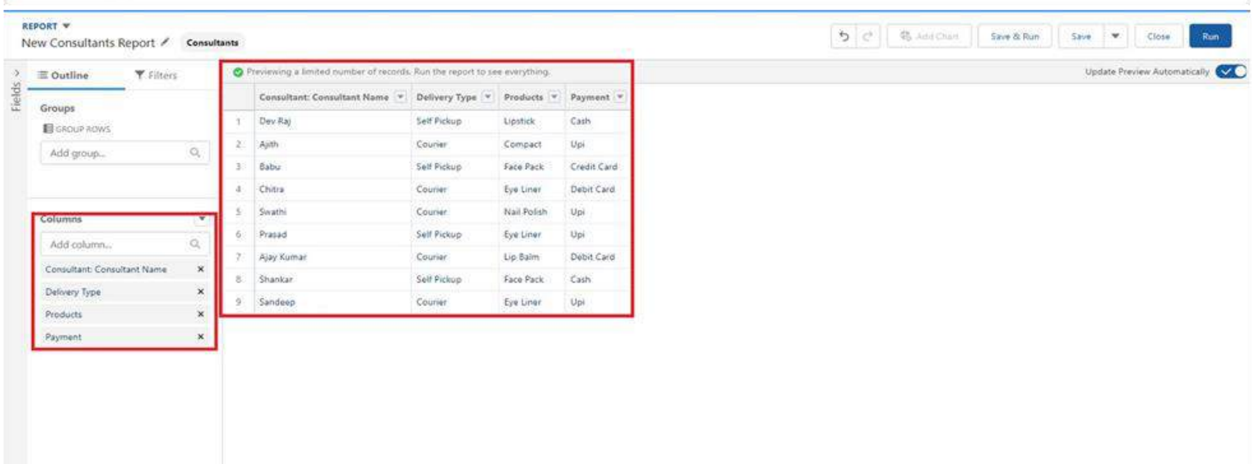
5.Click the report type as Consultants ClickStart report.
6. Customize your report, in Columns select - ConsultantName,Delivery type,Products,Payment.
7.Click on thedrop down option on the paymentcolumn and select Bucket this column.
8.Bucket Name as Payment type
9..Click on Add Bucket and name it as NetBanking
10. Click on Add Bucket and name it as Cash
11.Now Click on All Valuesand select Credit card,Debit card,Upi and Move to Net Banking.
12.NowClick on All Values again and select Cash and Move to Cash.
13. Click on Apply.



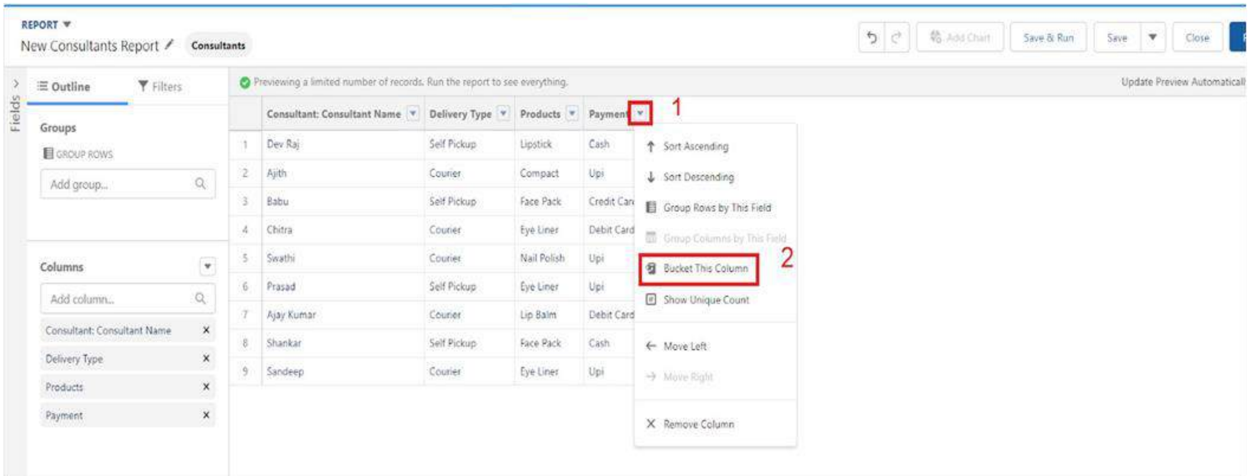
Setup
Home
Object Manager
1
2
ur
Apps
Urban Color
Items
Asset Action Sources
Data Use Purpose
Operating Hours
Our Customers
Return Orders
View More
Home
Create
Get Started with Einstein Bots
Mobile Publisher
Use the Mobile Publisher to create your own branded mobile app.
Learn More
Real-time Collaborative Docs
Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.
Get Started
Optimizer
ADMINISTRATION
Users
Data
Email
PLATFORM TOOLS
Subscription Management
Apps
Feature Settings
Most Recently Used
10 items
NAME
TYPE
OBJECT
Customer Details
Custom Field Definition
Consultant

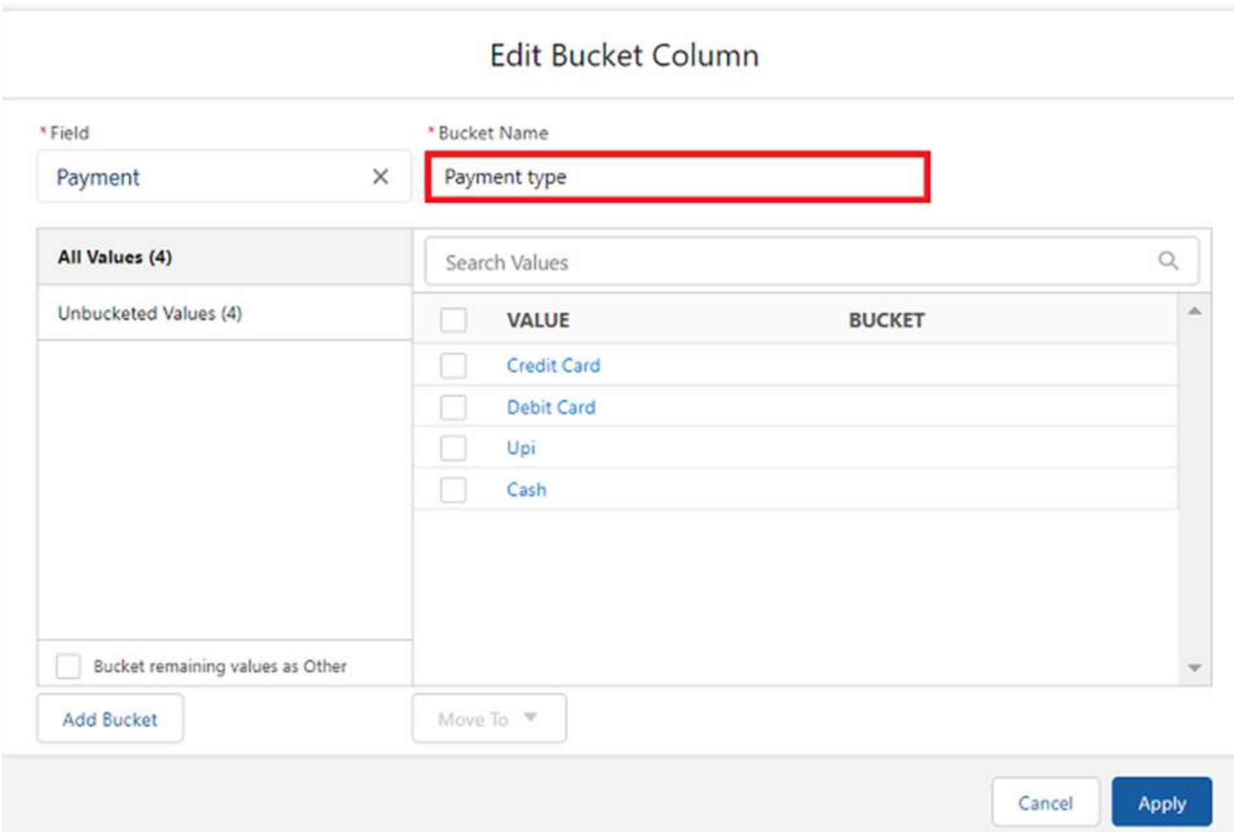


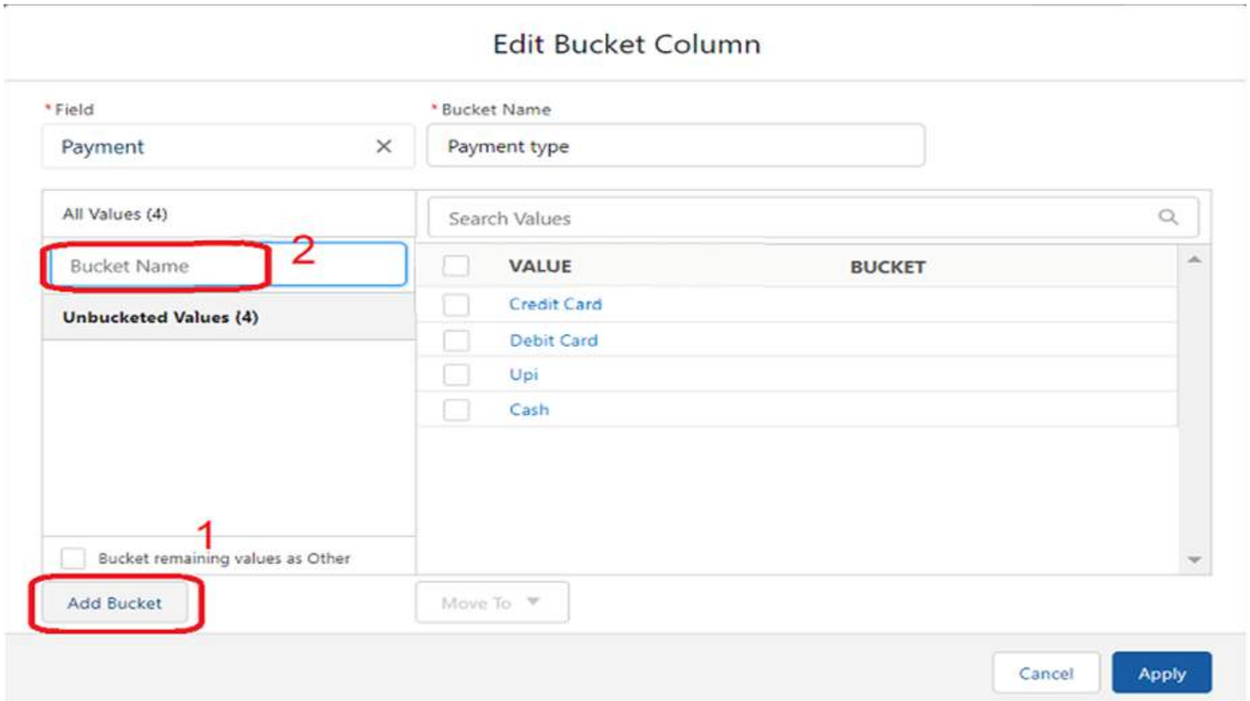
Urban Color
Our Customers
Consultants
Retailers
others
Reports
Dashboards
1
Reports
Recent
3 items
Search recent reports...
New Report
New Folder
2
REPORTS
Report Name
Description
Folder
Created By
Created On
Subscribed

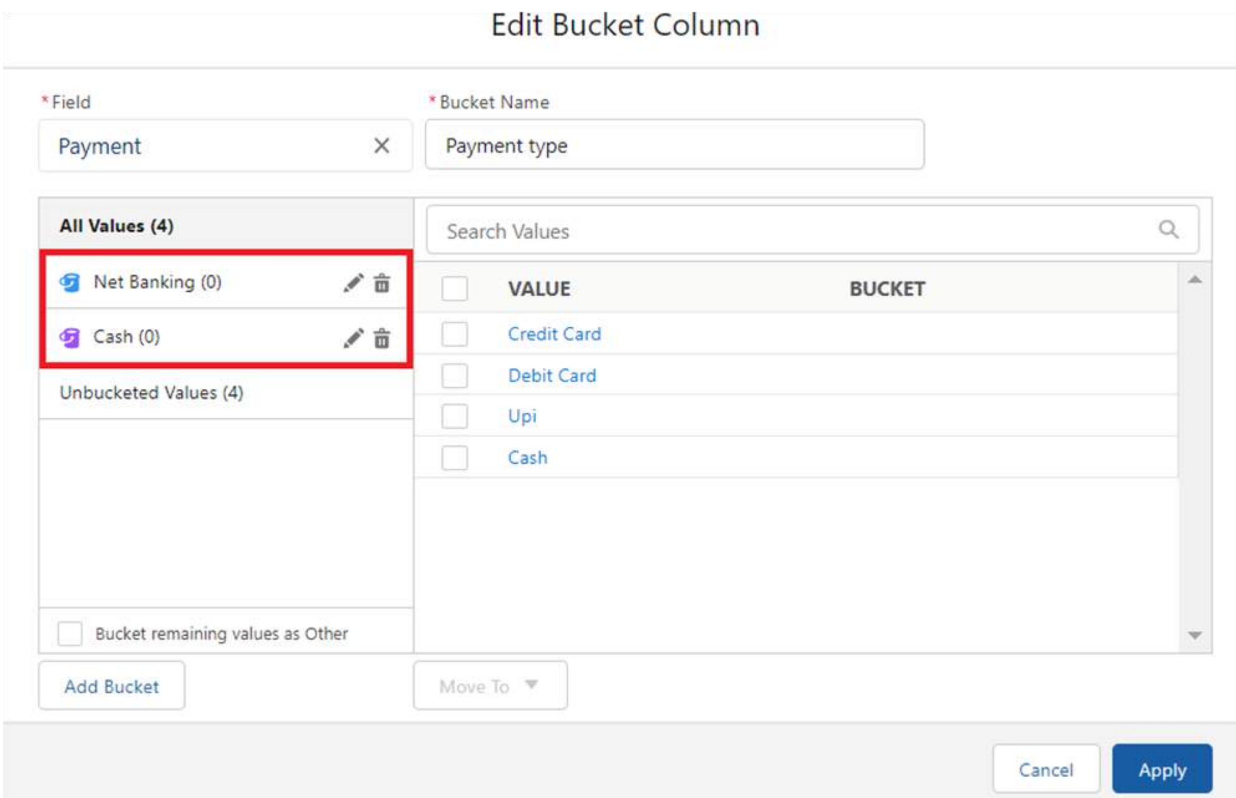


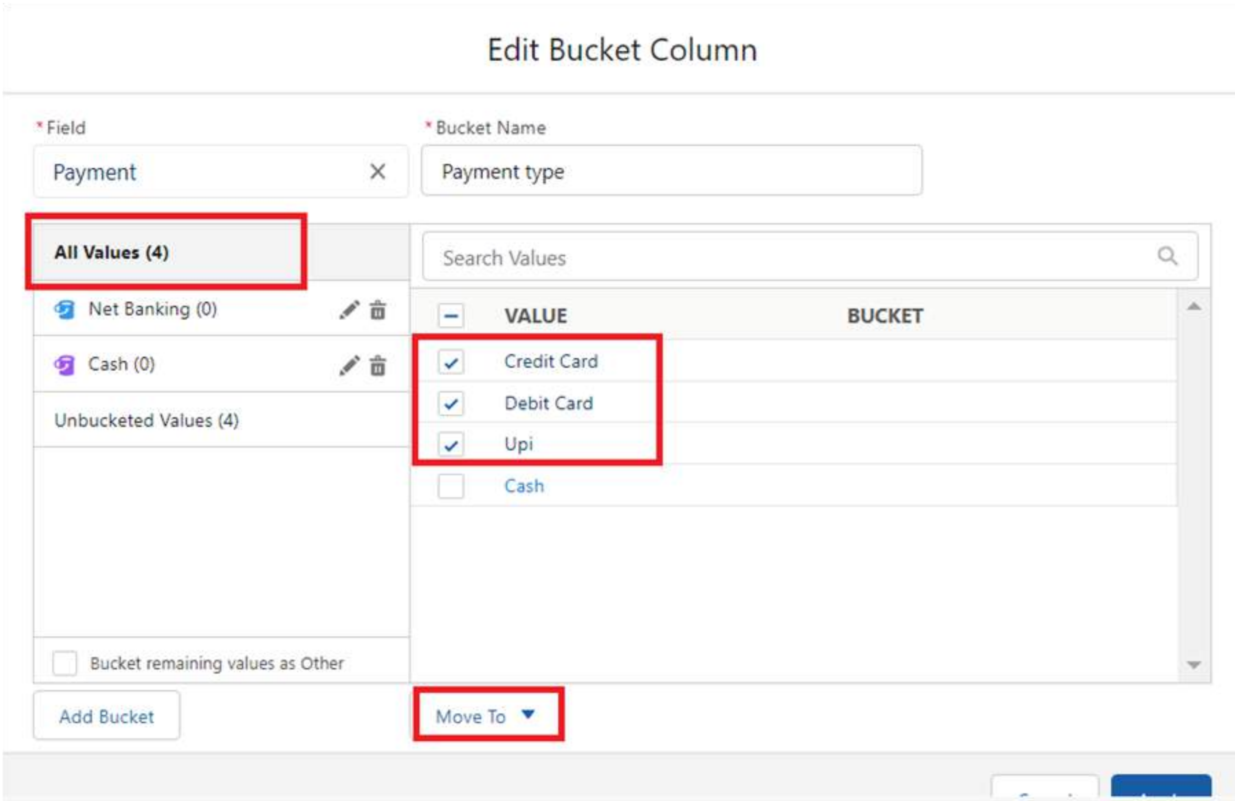
REPORT
New Consultants Report
Consultants
Add Chart
Save & Run
Save
Close
Run
Outline
Filters
Fields
Groups
GROUP ROWS
Add group...
Columns
Add column...
Consultant: Consultant Name
Delivery Type
Products
Payment
Previewing a limited number of records. Run the report to see everything.
Update Preview Automatically
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

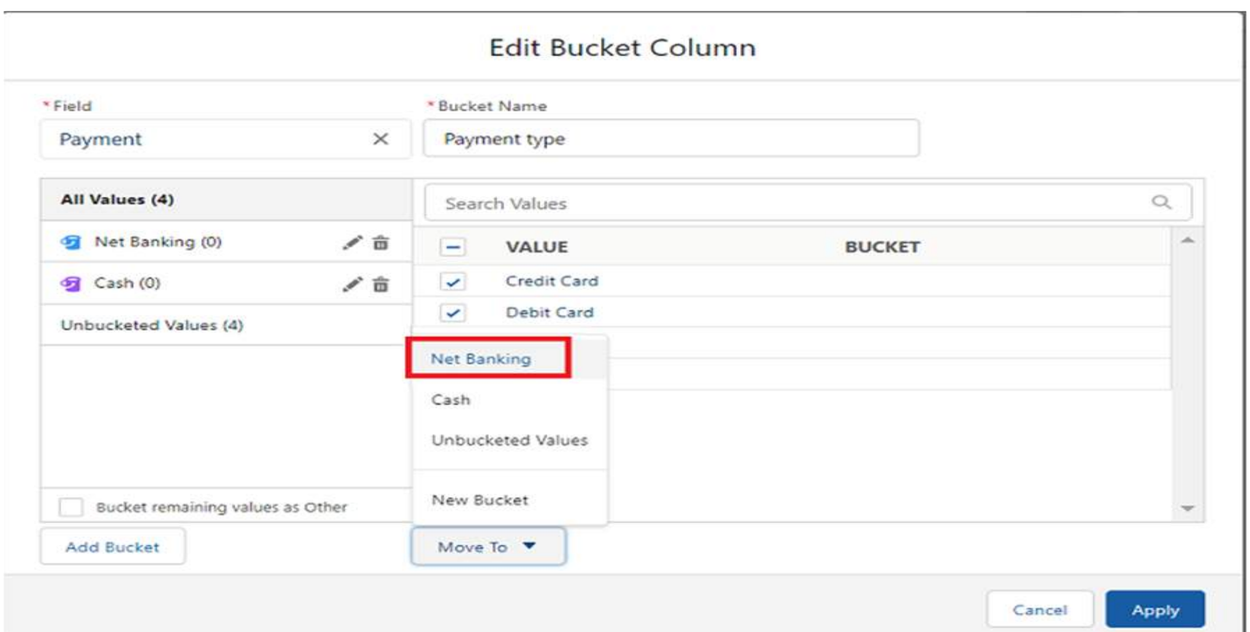

REPORT
New Consultants Report
Consultants
Add Chart
Save & Run
Save
Close
Fields
Outline
Filters
Groups
GROUP ROWS
Add group...
Columns
Add column...
Consultant: Consultant Name
Delivery Type
Products
Payment
Previewing a limited number of records. Run the report to see everything.
Update Preview Automaticall
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 Car
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
2
Show Unique Count
Move Left
Move Right
Remove Column

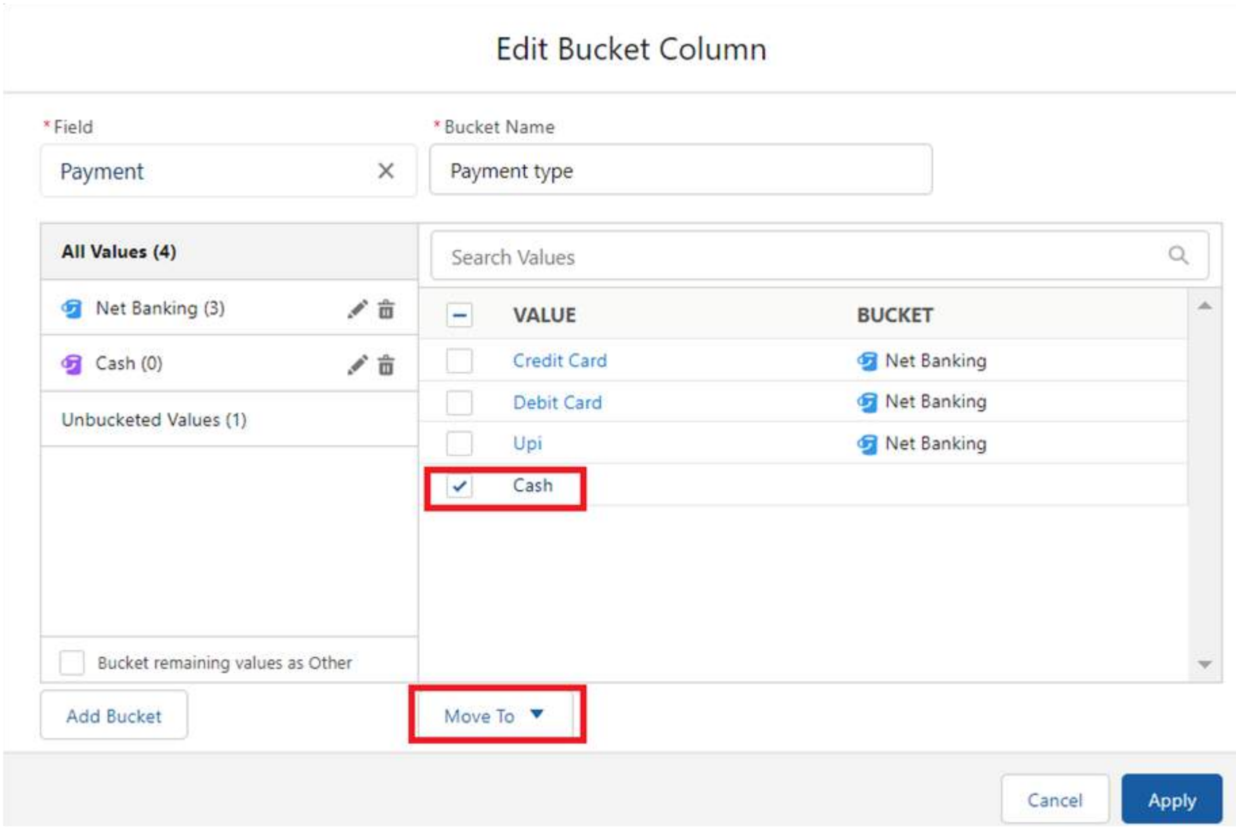

Edit Bucket Column
* Field
Payment
* Bucket Name
Payment type
All Values (4)
Unbucketed Values (4)
Search Values
VALUE
BUCKET
Credit Card
Debit Card
Upi
Cash
Bucket remaining values as Other
Add Bucket
Move To
Cancel
Apply

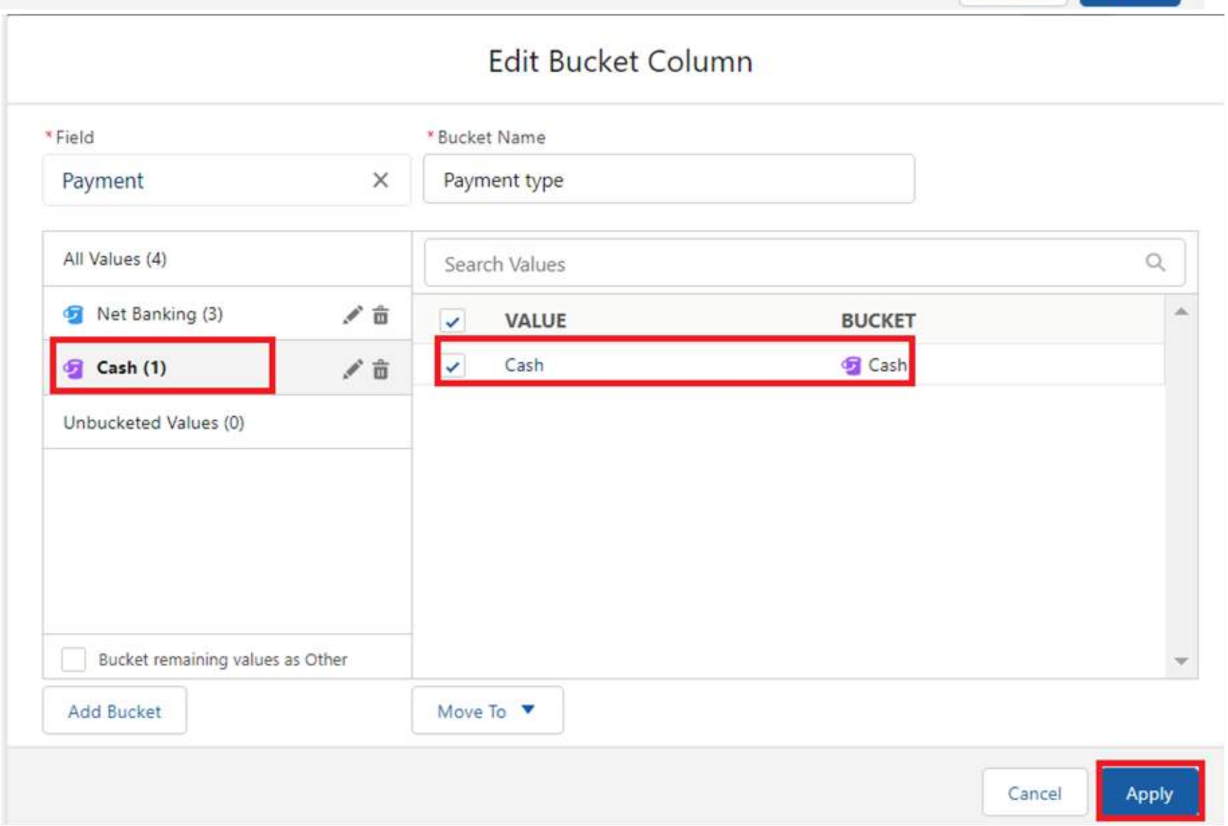

Edit Bucket Column
* Field
Payment
* Bucket Name
Payment type
All Values (4)
Bucket Name
2
Unbucketed Values (4)
Search Values
VALUE
BUCKET
Credit Card
Debit Card
Upi
Cash
1
Bucket remaining values as Other
Add Bucket
Move To
Cancel
Apply

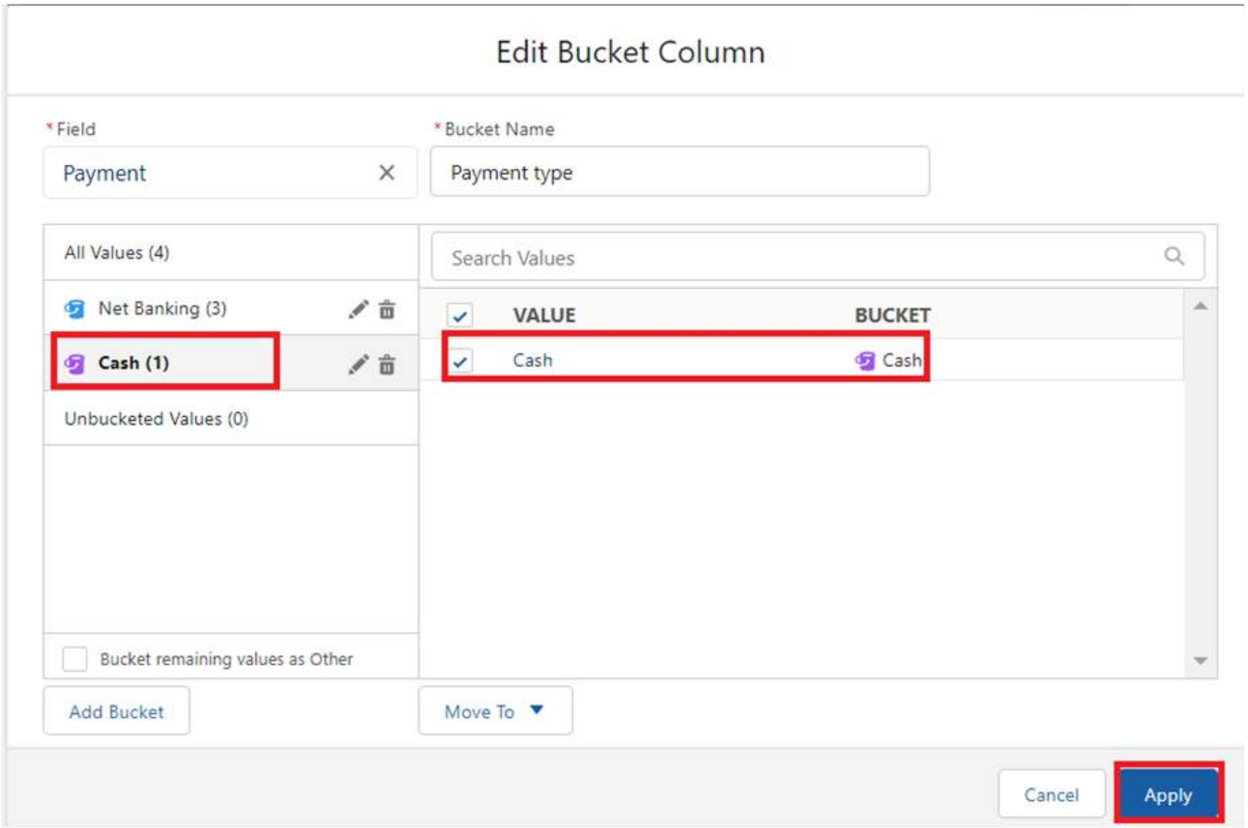

Edit Bucket Column
* Field
Payment
* Bucket Name
Payment type
All Values (4)
Net Banking (0)
Cash (0)
Unbucketed Values (4)
Search Values
VALUE
BUCKET
Credit Card
Debit Card
Upi
Cash
Bucket remaining values as Other
Add Bucket
Move To
Cancel
Apply


Edit Bucket Column
* Field
Payment
* Bucket Name
Payment type
All Values (4)
Net Banking (0)
Cash (0)
Unbucketed Values (4)
Search Values
VALUE
BUCKET
Credit Card
Debit Card
Upi
Cash
Bucket remaining values as Other
Add Bucket
Move To


Edit Bucket Column
* Field
Payment
* Bucket Name
Payment type
All Values (4)
Net Banking (0)
Cash (0)
Unbucketed Values (4)
Search Values
VALUE
BUCKET
Credit Card
Debit Card
Net Banking
Cash
Unbucketed Values
New Bucket
Bucket remaining values as Other
Add Bucket
Move To
Cancel
Apply


Edit Bucket Column
*Field
Payment
*Bucket Name
Payment type
All Values (4)
Net Banking (3)
Cash (0)
Unbucketed Values (1)
Bucket remaining values as Other
Search Values
VALUE
BUCKET
Credit Card
Net Banking
Debit Card
Net Banking
Upi
Net Banking
Cash
Add Bucket
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
Search Values
VALUE
BUCKET
Cash
Cash
Add Bucket
Move To
Cancel
Apply



16. In Group Rows Add Payment Type Bucket Field.15.Click refresh

17 .Click Save and Run

Givereport name – Consultant report
18.Click Save.

View Report

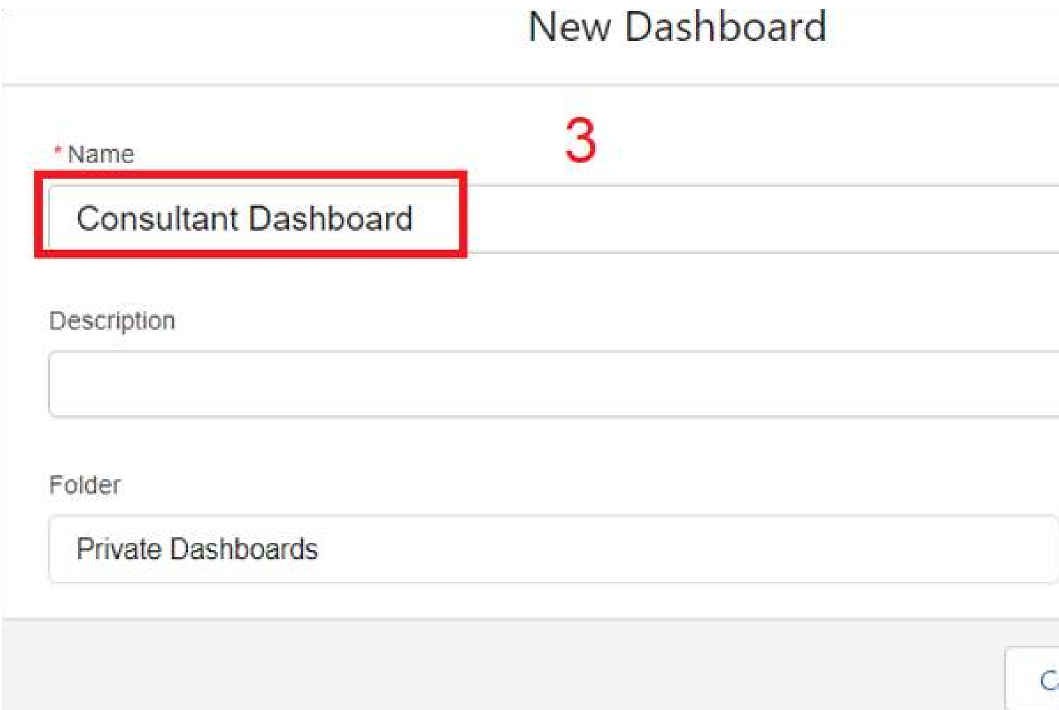
a. Click on App Launcher on the left side of the screen.
b. Search UrbanColor App & click on it.
c. Click on Reports Tab.
d. Click on Urban ColorReport and see records

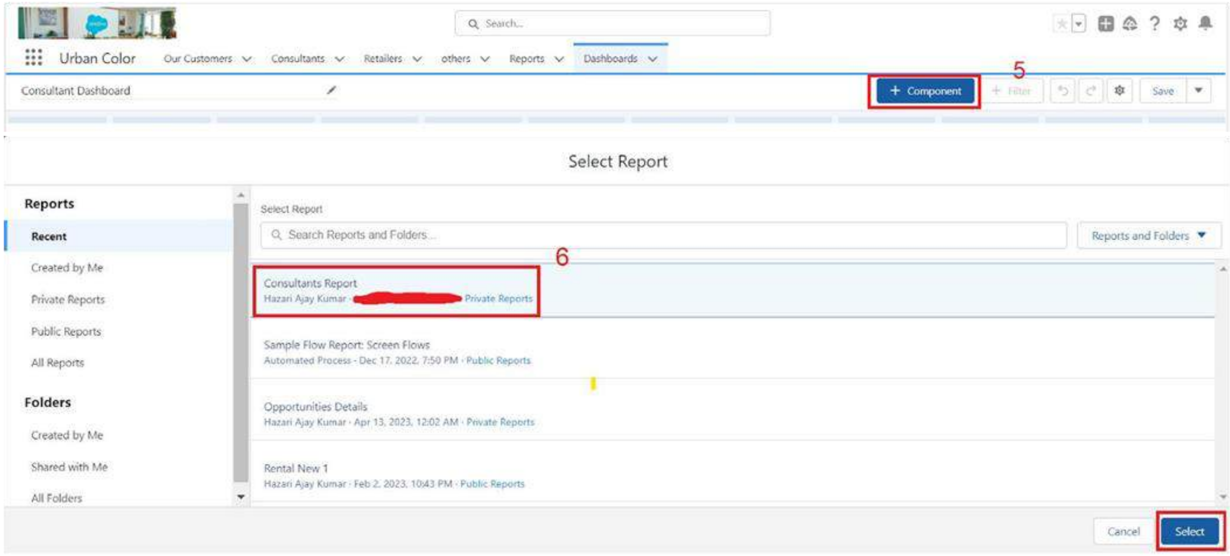
12. Dashboards

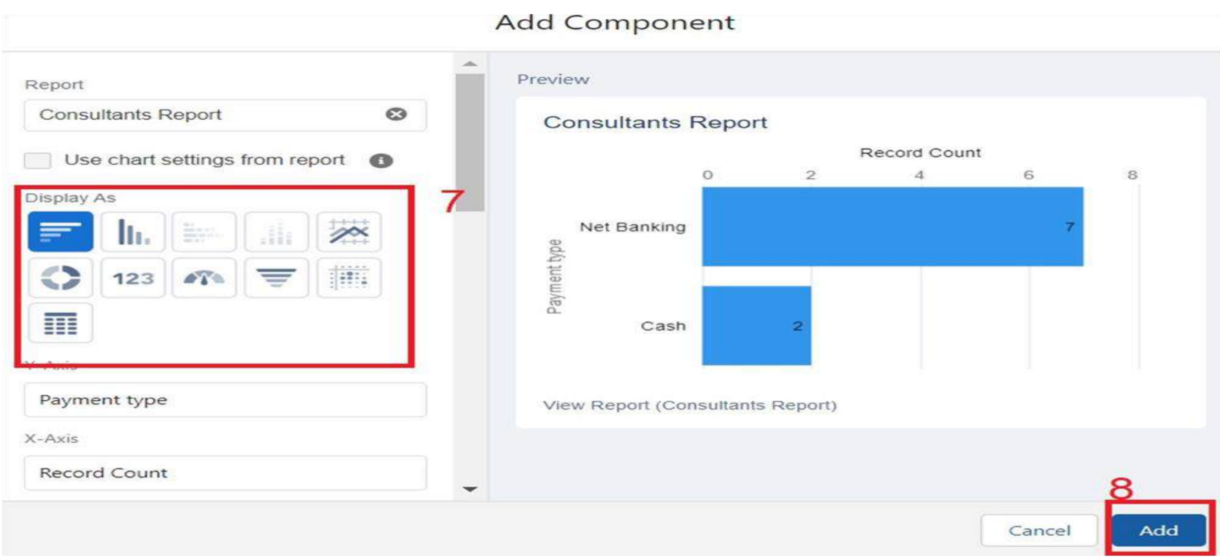
Dashboards let you curate data from reports using charts, tables, and metrics. If your colleagues need more information, then they're able to view your dashboard's data supplying reports.Dashboard filters make it easy for users to apply different data perspectives to a single dashboard.

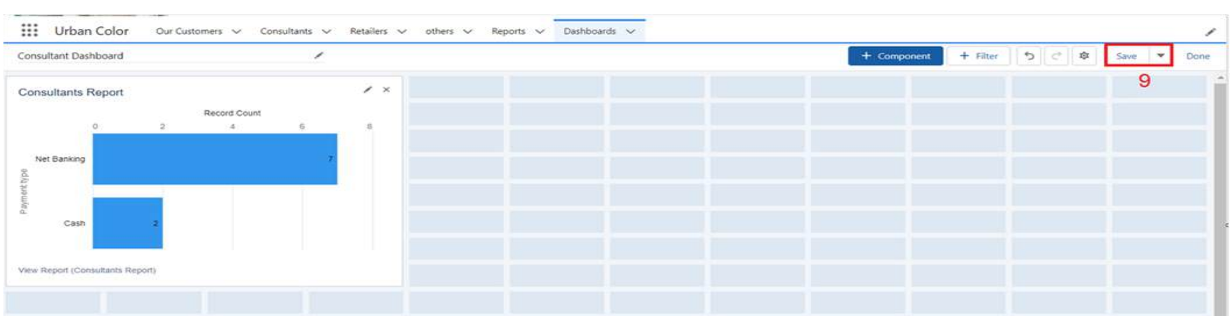
Create Dashboard

1. Click on the Dashboards tab from the UrbanColor application.
2. Click on the newdashboard.
3. Give name- Consultant Dashboard
4. Click create
5. Give your dashboard a name and click on +component
6. Select the Consultants Reportwhich you created.
7. For the data visualization select any of the chart, tableetc. as peryour choice/requirement.
8. Click add.
9. Click save.









View Dashboard

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