

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 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.

INDEX PAGE

Topics

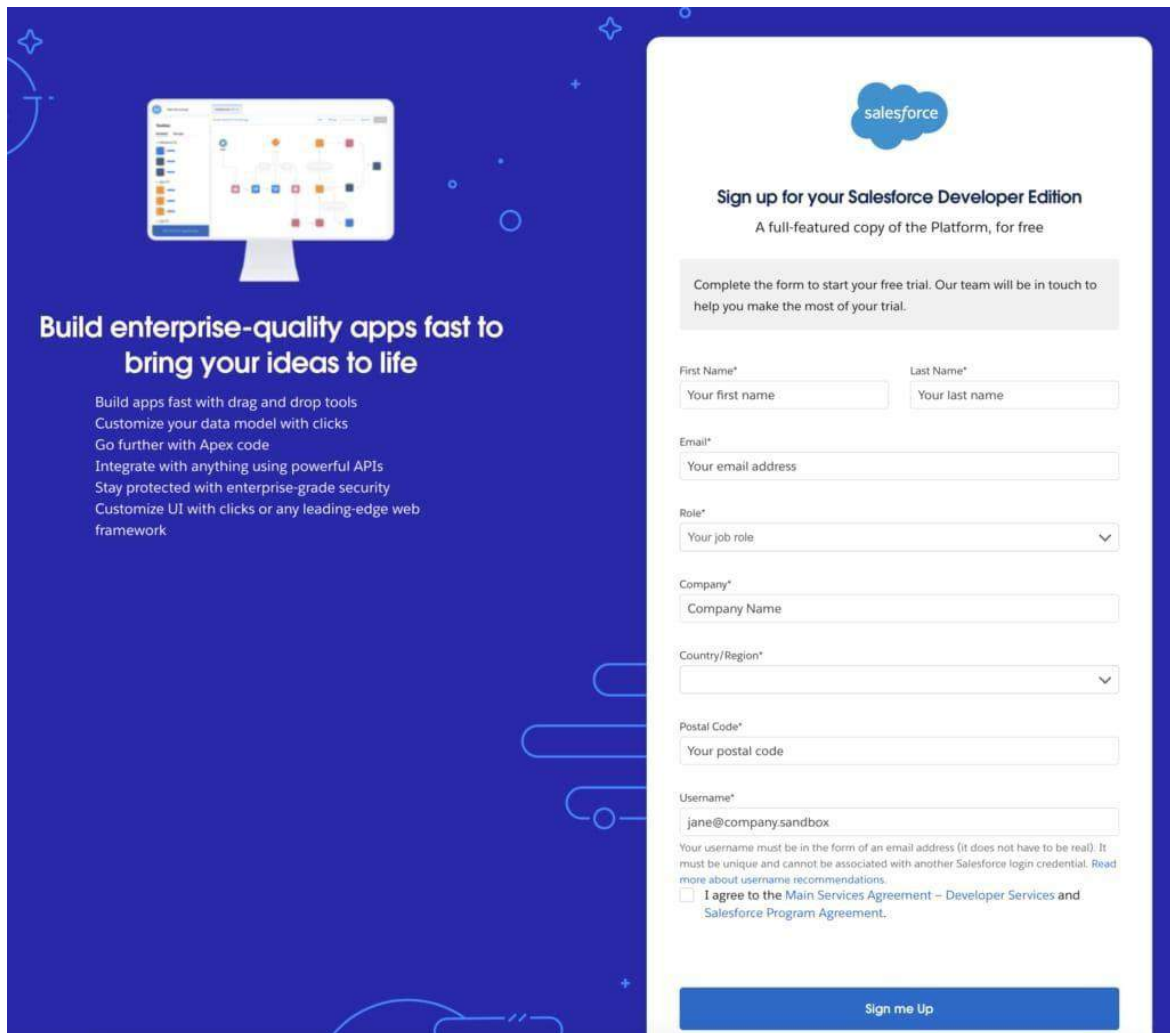
1. Creation Salesforce Org
2. Object
3. Fields And Relationships

4. Page Layouts
5. The Lightning App
6. Profile
7. Setup Roles
8. Users
9. User Adoption
10. Import Data
11. Reports
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 up form, enter the following details :



The image shows the Salesforce Developer Edition sign-up page. On the left, there's a blue background with a monitor icon displaying a Salesforce interface and the text: "Build enterprise-quality apps fast to bring your ideas to life". Below this, it lists features: "Build apps fast with drag and drop tools", "Customize your data model with clicks", "Go further with Apex code", "Integrate with anything using powerful APIs", "Stay protected with enterprise-grade security", and "Customize UI with clicks or any leading-edge web framework". On the right, the form is white with the Salesforce logo at the top. The heading is "Sign up for your Salesforce Developer Edition" with the subtext "A full-featured copy of the Platform, for free". A grey box contains the text: "Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial." The form fields are: "First Name*" (placeholder: "Your first name"), "Last Name*" (placeholder: "Your last name"), "Email*" (placeholder: "Your email address"), "Role*" (dropdown menu with "Your job role" selected), "Company*" (placeholder: "Company Name"), "Country/Region*" (dropdown menu), "Postal Code*" (placeholder: "Your postal code"), and "Username*" (placeholder: "jane@company.sandbox"). Below the username field, there's a note: "Your username must be in the form of an email address (it does not have to be real). It must be unique and cannot be associated with another Salesforce login credential. Read more about username recommendations." and a checkbox for "I agree to the Main Services Agreement – Developer Services and Salesforce Program Agreement.". At the bottom right is a blue "Sign me Up" button.

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 anything in the format

: username@organization.com

Step-2: Account Activation

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



2. Click on verify account.
3. Give a password and answer a security question and click on change password.

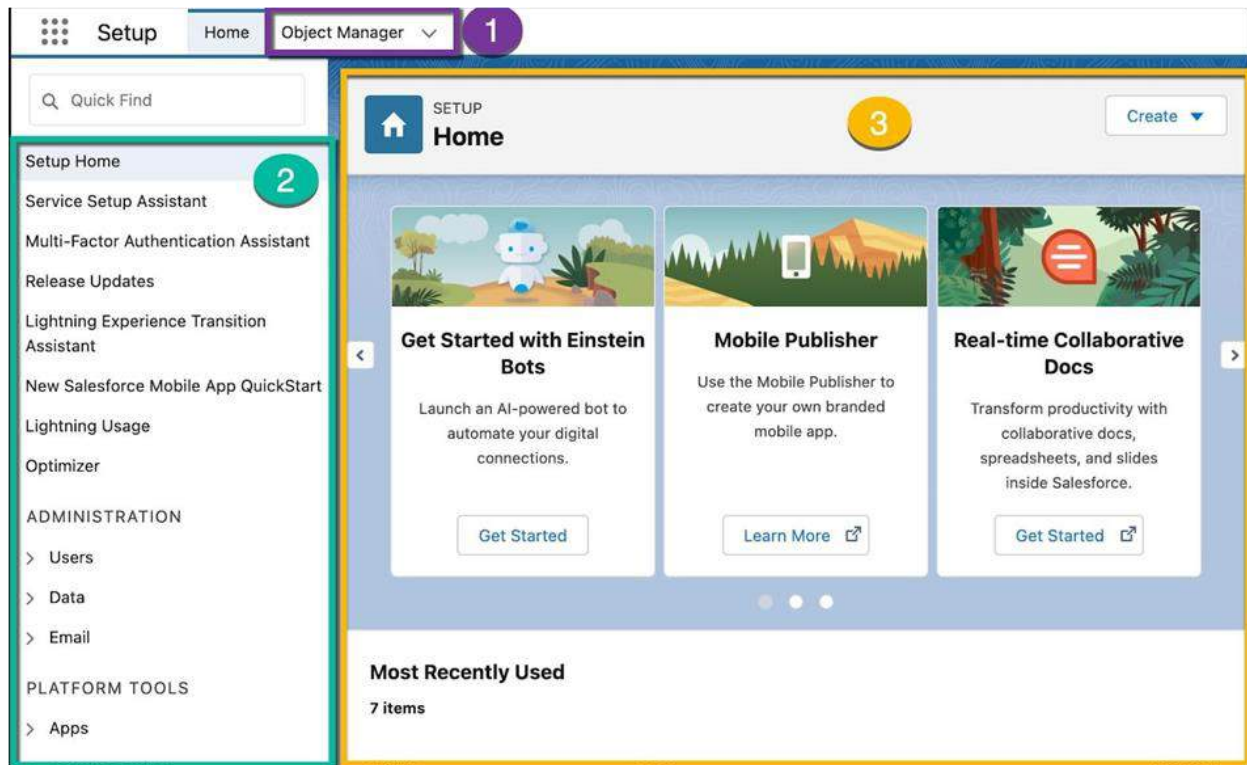


The image shows the Salesforce 'Change Your Password' interface. At the top is the Salesforce logo. Below it, the title 'Change Your Password' is centered. The form contains a section for 'Enter a new password for' with a text input field and a 'Show/Hide' toggle. Below this, a list of password requirements is shown with green checkmarks: '8 characters', '1 letter', and '1 number'. There are two more input fields: '* New Password' and '* Confirm New Password', each with a 'Show/Hide' toggle. A blue 'Change Password' button is at the bottom. At the very bottom, a small note states 'Password was last changed on 1/15/2014, 2:00 PM'.

4. when you will redirect to your salesforce setup page.

Step 3: Login to Your Salesforce Account

1. Go to login.salesforce.com.
2. Enter your username and password created during the sign-up process.
3. Login to access your Salesforce Developer account. ■ You will see the home page after logging in.



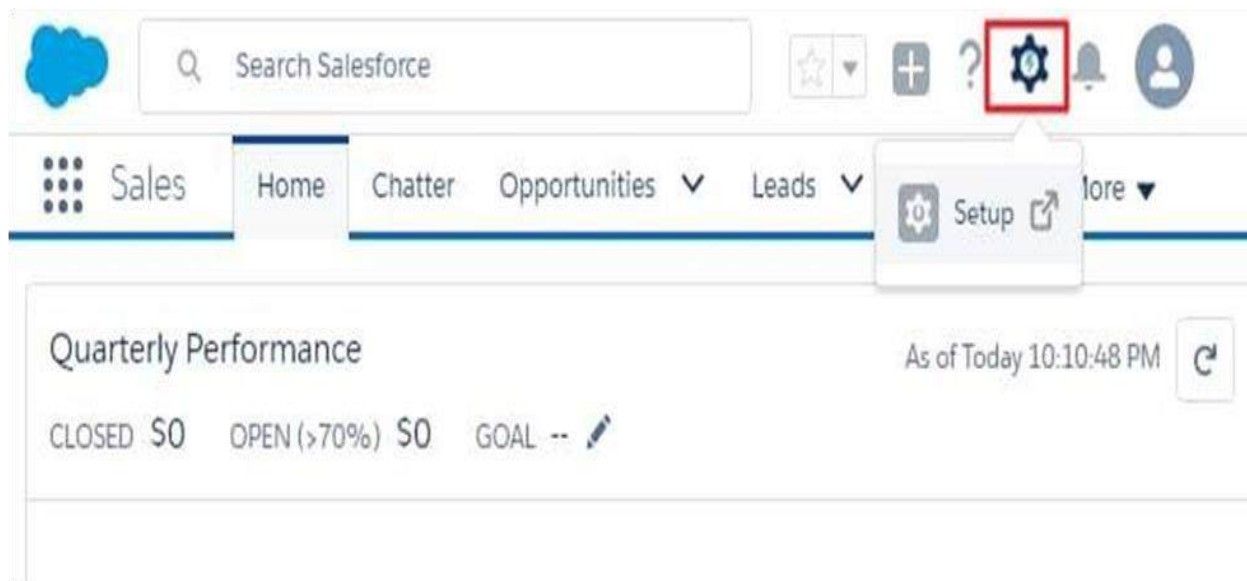
2.Object

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 essential to their organization. They are the heart of any application and provide a structure for sharing data.



2.1 Create SupplierObject

To create an object:

From the setup page , Click on Object Manager then Click on Create and Click on 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 reports and 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 then Click 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 reports and 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 Receipt objects.

1. Use these display format for 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



SETUP > OBJECT MANAGER

Lead

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Slack Record Layouts

Scoping Rules

Triggers


Custom Fields

Use the tabs to map each of your organization's custom lead fields to one of your custom account, contact, or opportunity fields. These mappings are used when you convert leads to accounts, contacts, or opportunities.

ACCOUNT


CONTACT

OPPORTUNITY



Lead Fields

Account	None
Avatar URL	Avatar URL
Company Avatar URL	None
Company LinkedIn	None
Current Generator(S)	None
DB Created Date Without Time	None
DB Lead Age	None
HiHorizons ID	None



Account Fields

None
Avatar URL
None
None
None
None
None
None

Relationships:

- Define connections between objects (accounts, contacts, opportunities)
- 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: manage objects 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

- 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 pagelayouts for the selected object.
- Select the Consultant Layout page layout.

The screenshot shows the Salesforce Page Layout Editor interface. On the left is a sidebar with navigation options: Personal Setup (My Personal Information, Email, Import, Desktop Integration, My Chatter Settings) and App Setup (Customize, Tab Names and Labels, Home, Activities, Campaigns, Leads, Accounts, Contacts, Opportunities, Fields, Validation Rules, Triggers, Contact Roles, Competitors). The main area is titled "New Record Type Layout" and includes a "Quick Find" bar and a "Layout Properties" button. Below this is a table of fields available for the layout, including Blank Space, Section, Account Name, Amount, Close Date, Description, Expected Revenue, Forecast Category, Last Modified By, Next Step, Opportunity Name, Opportunity Owner, Opportunity Recer..., Primary Campaign..., Private, Probability (%), Quantity, and Type. The "Opportunity Sample" section shows the "Opportunity Detail" layout with standard buttons (Edit, Delete, Clone, Sharing) and custom buttons. The fields section shows a list of fields with their values: Opportunity Name (Sample Opportunity Name), Account Name (Sample Account), Close Date (25/07/2011), Stage (Sample Stage), and Probability (%) (332%). The "Custom Links" section is also visible at the bottom.

Expand All | Collapse All

Quick Find

Personal Setup

- My Personal Information
- Email
- Import
- Desktop Integration
- My Chatter Settings

App Setup

- Customize
 - Tab Names and Labels
 - Home
 - Activities
 - Campaigns
 - Leads
 - Accounts
 - Contacts
 - Opportunities
 - Fields
 - Validation Rules
 - Triggers
 - Contact Roles
 - Competitors

New Record Type Layout

Mini Page Layout | Mini Console View | Video Tutorial | Help for this Page

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

Quick Find: Field Name

Field Name	Type
Blank Space	Blank Space
Section	Section
Account Name	Text
Amount	Text
Close Date	Date
Description	Text
Expected Revenue	Text
Forecast Category	Text
Last Modified By	Text
Next Step	Text
Opportunity Name	Text
Opportunity Owner	Text
Opportunity Recer...	Text
Primary Campaign...	Text
Private	Text
Probability (%)	Text
Quantity	Text
Type	Text

Opportunity Sample

Opportunity Detail

Standard Buttons: Edit, Delete, Clone, Sharing

Custom Buttons: Next Step

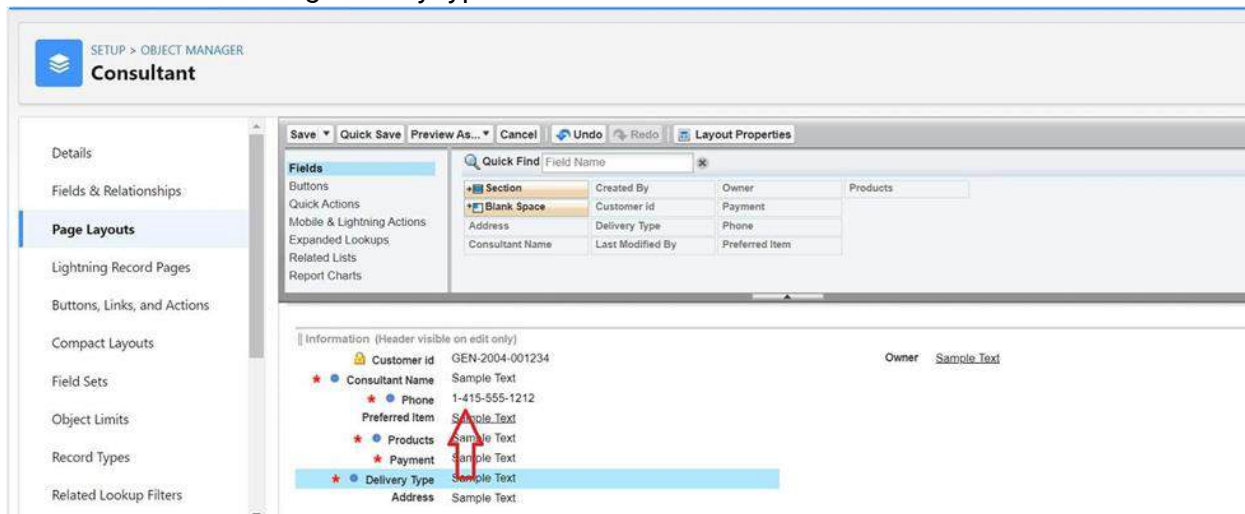
Fields (Header not visible)

- Opportunity Name: Sample Opportunity Name
- Account Name: Sample Account
- Close Date: 25/07/2011
- Stage: Sample Stage
- Probability (%): 332%

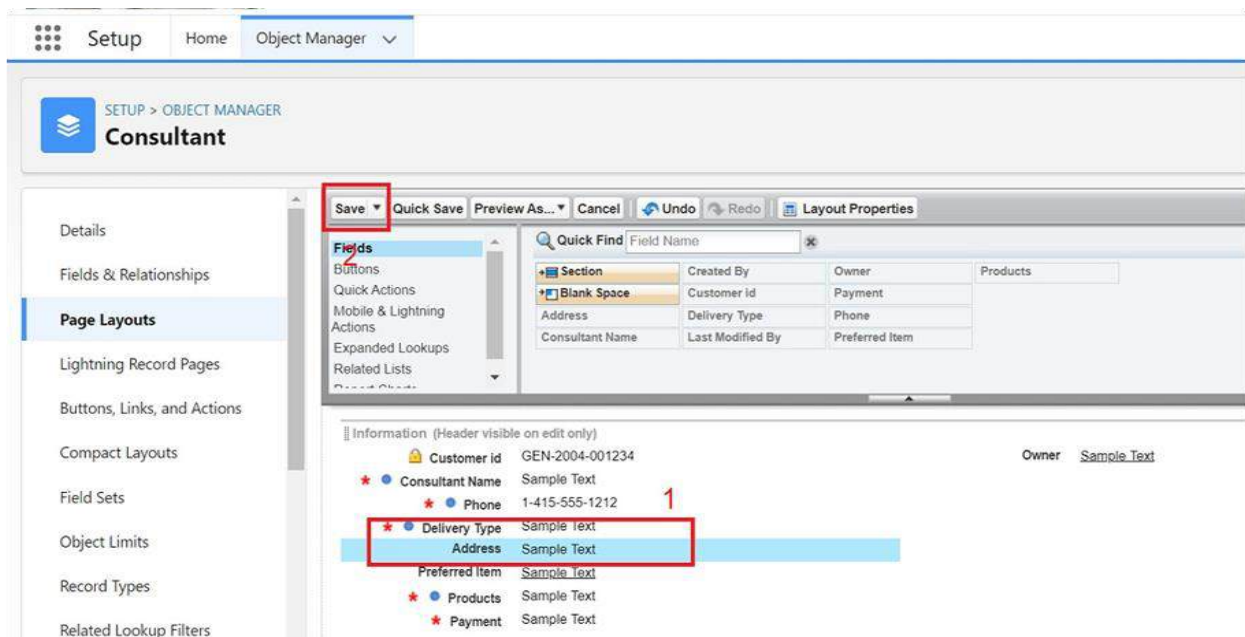
Created By: Sample User

Custom Links (Header visible on detail only)

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



e. Click on save



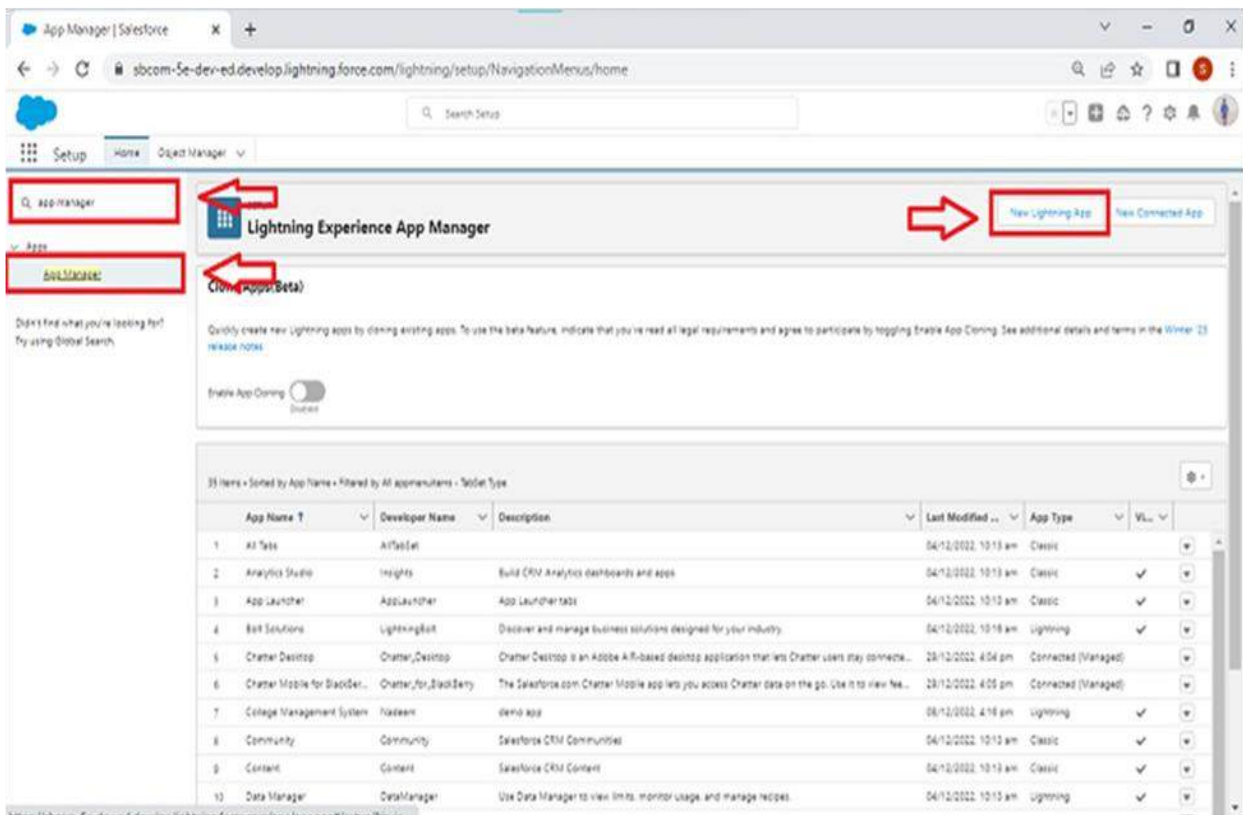
5. The Lightning App

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 details and branding --> Next --> (App option page) keep it as default --> Next --> (Utility Items) keep it as default --> Next.

New Lightning App

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

* App Name ⓘ
Name your app...

* Developer Name ⓘ
Enter a developer name...

Description ⓘ
Enter a description...

App Branding

Image ⓘ
Upload

Primary Color Hex Value ⓘ
#0070C2

Org Theme Options
☐ Use the app's image and color instead of the org's custom theme

App Launcher Preview

Next

3. To Add Navigation Items:

New Lightning App

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items

Create

Type to filter list...

- Accounts
- Activities
- Alert Settings
- All Sites
- Alternative Payment Methods
- App Launcher
- Appointment Invitations

Selected Items

No items selected

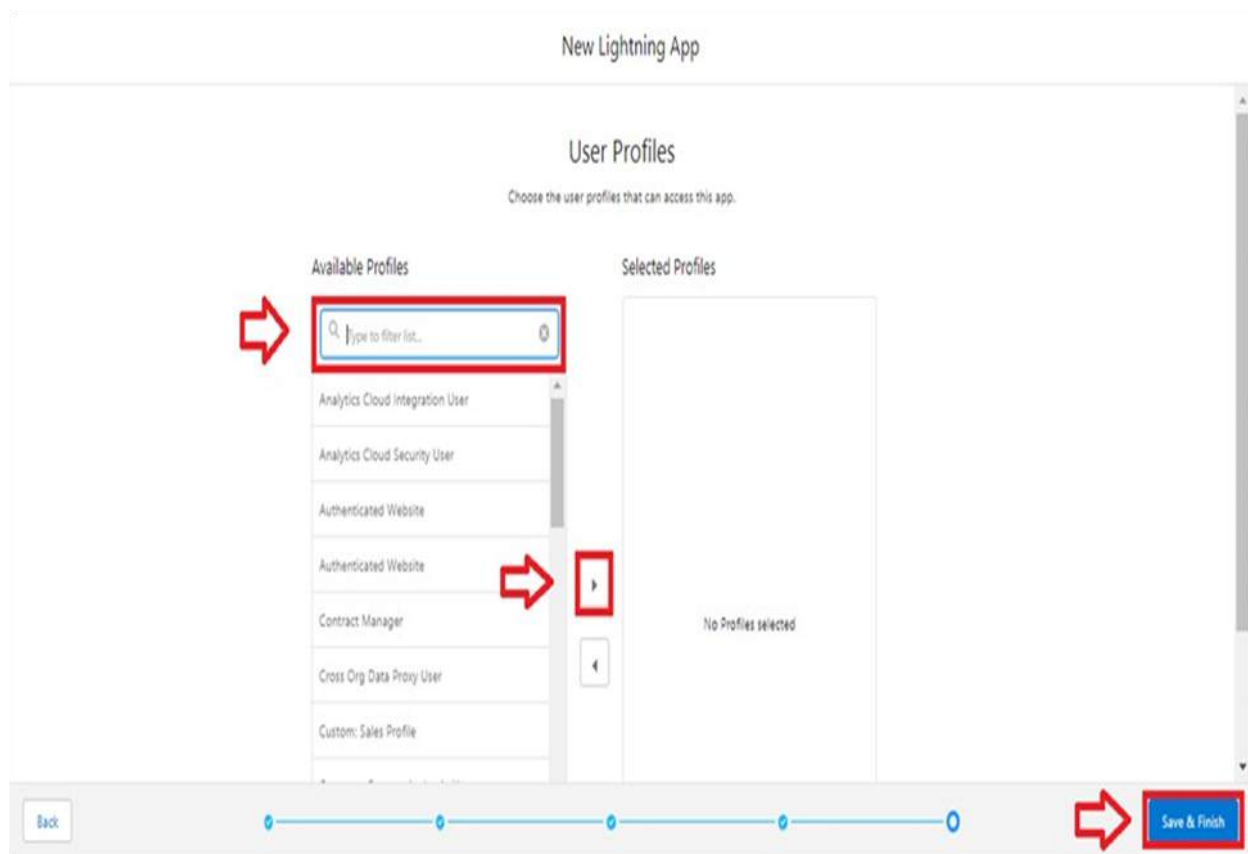
Back

Next

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.

Creating a Profiles

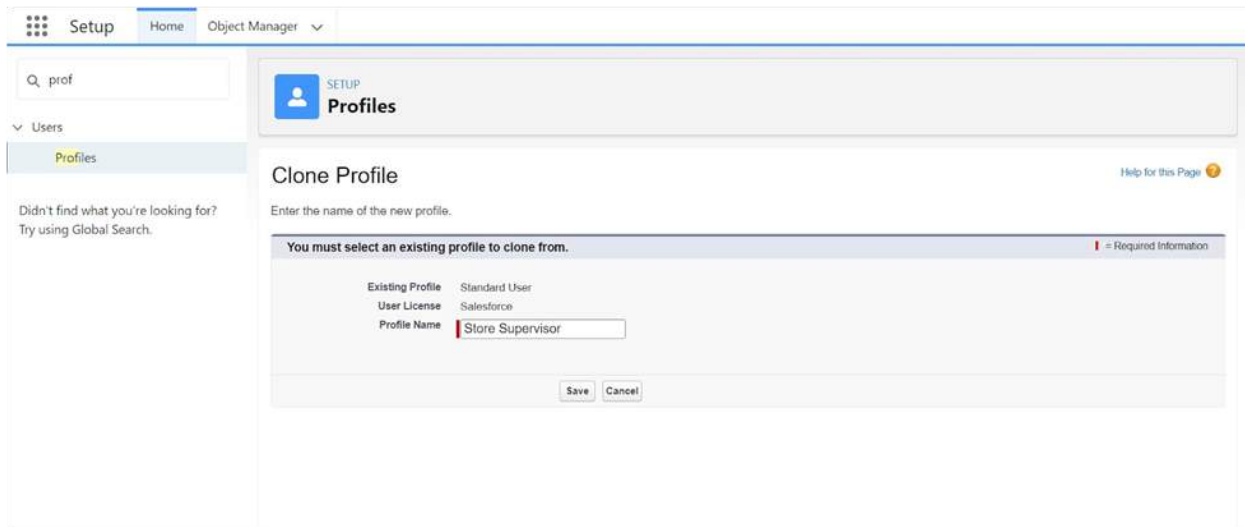
Creating a Profiles: Now create a Store Supervisor profile and set its object permissions.Creating a Profiles:

Now createa Store Supervisor profile and set its object permissions.

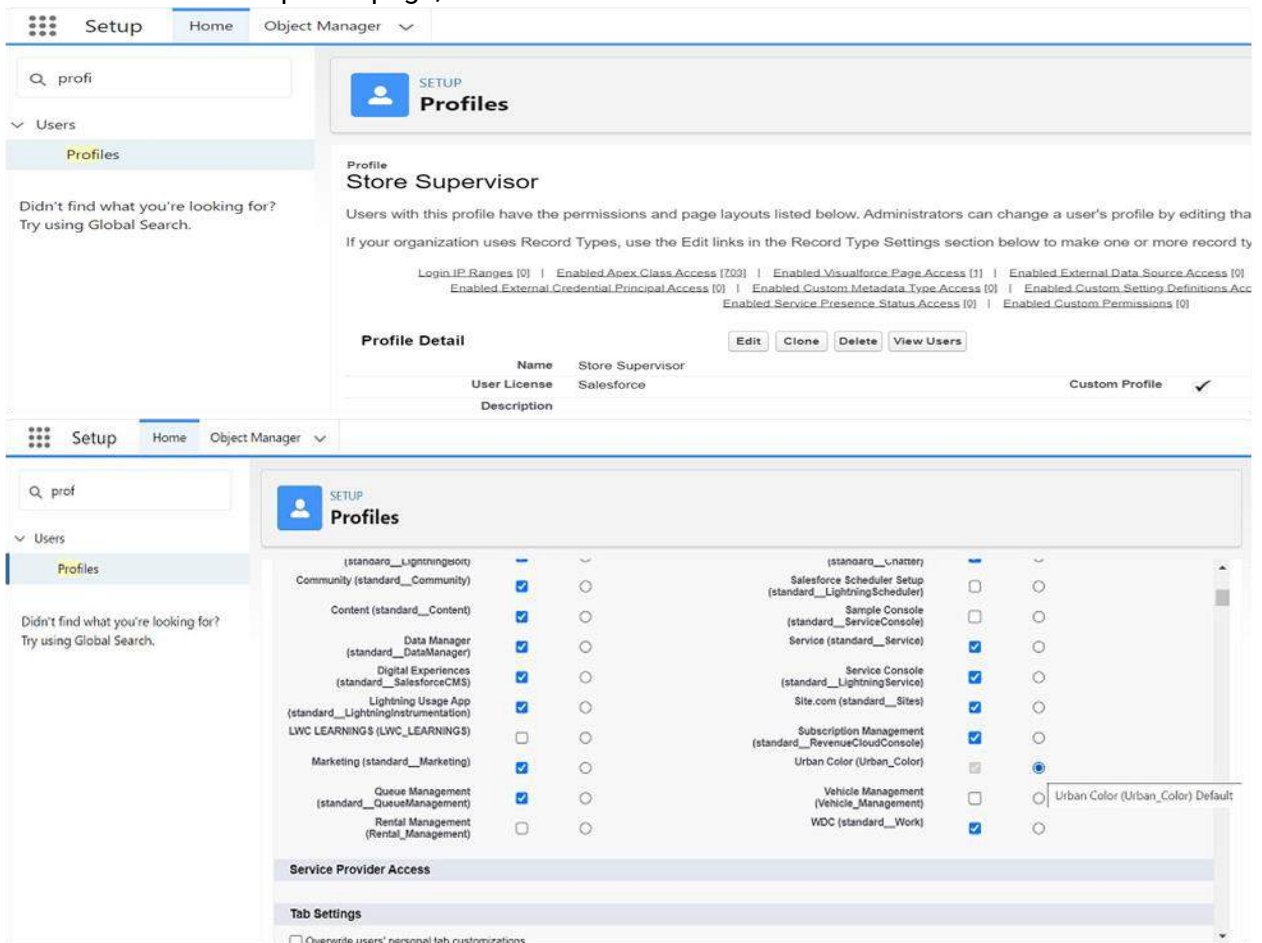
- From Setup enterProfiles in the Quick Find box, and select Profiles.
- From the list of profiles, find Standard User.
- Click Clone.
- For Profile Name, enter Store Supervisor.
- Click Save.
- While still on the Store Supervisor profile page, then click Edit.
- Scroll down to Custom Object Permissions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

SETUP
Profiles

Async Operation Results	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	others	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Back Synchs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Our Customers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Branches	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Pipelines	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Change Bundles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Pipeline Stages	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Change Bundle Installs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Change Submissions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Properties	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Commercial Vehicles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Remote Changes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Consultants	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Rentals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customers1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Repositories	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer Details	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Retailers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Deploy Components	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Semesters	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Deployment Results	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Source Member References	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

SETUP
Profiles

Allow CRM for employees ☐

Password Policies

User passwords expire in

Enforce password history

Minimum password length

Password complexity requirement

Password question requirement

Maximum invalid login attempts

Lockout effective period

Obscure secret answer for password resets ☐

Require a minimum 1 day password lifetime ☐

Don't immediately expire links in forgot password emails ☐

4. Click on Save.

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

Setup Home Object Manager

Q: profi

Users

Profiles

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

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile: Standard Platform User

User License: Salesforce Platform

Profile Name: Billing Operator

Save Cancel

Profile Edit

Billing Operator

Set the permissions and page layouts for this profile.

Profile Edit Save Save & New Cancel

Name: Billing Operator

User License: Salesforce

Description:

Custom Profile: ☒

Password Policies

ALLOW LOGIN FOR EMPLOYEES ☐

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: ☐

Require a minimum 1 day password lifetime: ☐

Don't immediately expire links in forgot password emails: ☐

Save Save & New Cancel

4. Click On Save

7. Setup Roles

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

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

Similarly create One Roles under StoreHead as Billing Operator.

The screenshot displays the Salesforce Setup interface for creating a new role. The left sidebar shows the navigation menu with 'Roles' highlighted under the 'Users' section. The main content area is titled 'Role Edit' and 'New Role'. The form contains the following fields:

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

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

Setup

Home

Object Manager

roles

Users

Roles

Feature Settings

Sales

Contact Roles on Contracts

Contact Roles on Opportunities

Service

Case Teams

Case Team Roles

Contact Roles on Cases

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

SETUP

Roles

Role Edit

New Role

Help for this Page

Role Edit

Label

Billing Operator

Role Name

Billing_Operator

This role reports to

Store Head

Role Name as displayed on reports

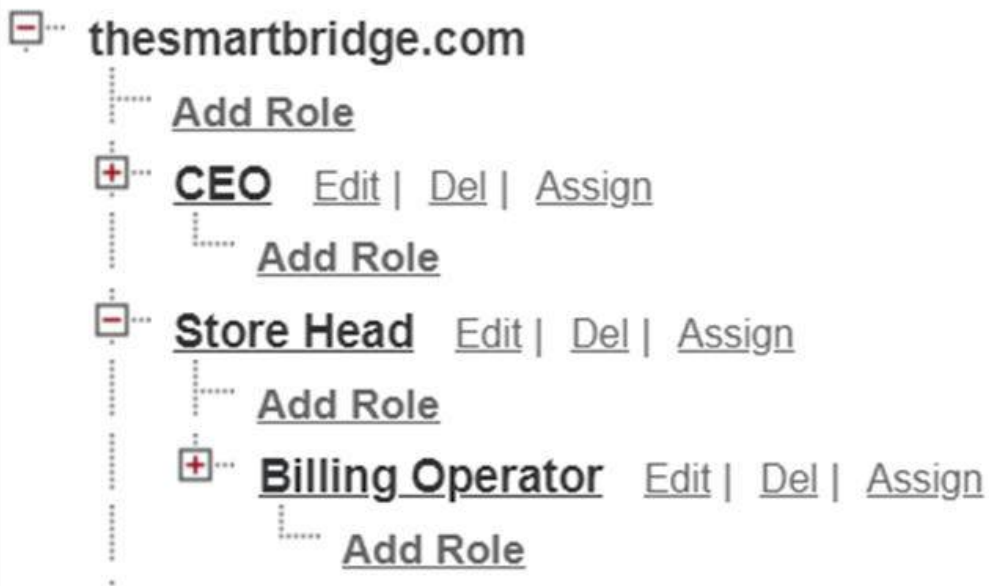
Save

Save & New

Cancel

Your Organization's Role Hierarchy

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



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:

- From Setup,in the Quick Find box, enter Users,and then selectUsers.
- Click New User.
- 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.
- Select a Role(Store Head)
- Select a User LicenceAs Salesforce.
- Select a profile as Store Supervisor.
- 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.

The screenshot shows the Salesforce Setup interface. On the left, the 'Setup' menu is open, and 'Users' is selected under 'User Management Settings'. The main area displays the 'User Edit' form for a new user. The form is titled 'User Edit' and has buttons for 'Save', 'Save & New', and 'Cancel'. Below the title is the 'General Information' section, which includes fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. The 'Role' field is set to 'Store Head', 'User License' is 'Salesforce', and 'Profile' is 'Store Supervisor'. The 'Active' checkbox is checked. There are also checkboxes for 'Marketing User', 'Offline User', 'Knowledge User', 'Flow User', 'Service Cloud User', 'Site.com Contributor User', 'Site.com Publisher User', and 'WDC User'. A 'Data.com User Type' dropdown is set to '--None--'. A red icon and text 'Required Information' are visible in the top right corner of the form.

Field	Value
First Name	Amar
Last Name	k
Alias	ak
Email	mailid@gmail.com
Username	amark2133@salesforce.com
Nickname	User167161323313747430
Title	Store Supervisor
Company	
Department	
Division	
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.

Setup Home Object Manager

Search Setup

Search user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

User Interface

Action Link Templates

Actions & Recommendations

App Menu

Custom Labels

Density Settings

Global Actions

SETUP Users

User Edit

Save Save & New Cancel

General Information

First Name John

Last Name Teddy

Alias jtedd

Email teddyjohn@gmail.com

Username john.teddy@salesforce.com

Nickname User167160296867441831

Title Vehicle Manager

Company

Department

Division

Role Billing Operator

User License Salesforce Platform

Profile Billing Operator

Active ☒

Marketing User ☐

Offline User ☐

Knowledge User ☐

Flow User ☐

Service Cloud User ☐

Site.com Contributor User ☐

Site.com Publisher User ☐

WDC User ☐

Data.com User Type -None-

Data.com Monthly Addition Limit 100

Accessibility Mode (Classic Only) ☐

High Contrast Palette on Charts ☐

Load Lightning Pages While Scrolling ☒

Debug Mode ☐

Make Setup My Default Landing Page ☐

Setup Home Object Manager

Search Setup

Search use

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Process Automation

Paused And Failed Flow

SETUP Users

Single Sign On Information

Federation ID

Locale Settings

Time Zone (GMT-07:00) Pacific Daylight Time (America/Los_Angeles)

Locale English (United States)

Language English

Approver Settings

Delegated Approver

Manager

Receive Approval Request Emails Only if I am an approver

☐ Generate new password and notify user immediately

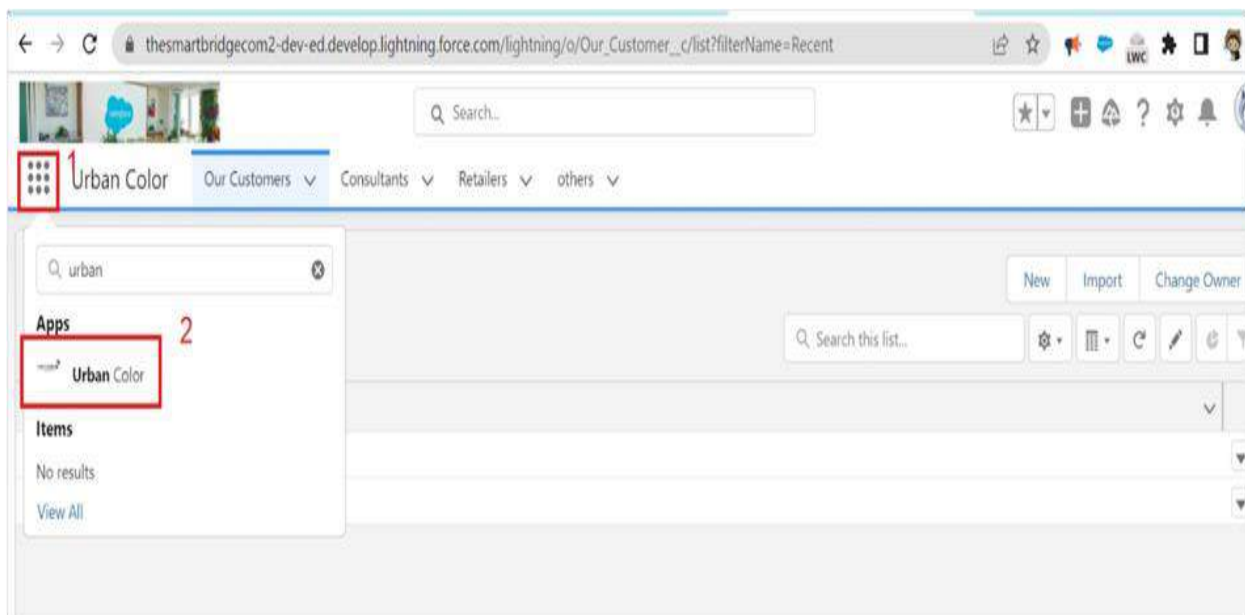
Save Save & New Cancel

9. User Adoption

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

Create Our Customer Record

- a. Click on App Launcher on left side of screen.
- b. Search UrbanColor & click on it.
- c. Click on OurCustomer tab.
- d. Click new button
- e. Fill all Our Customer record details.
- f. Click on SaveButton



Urban Color Our Customers Consultants Retailers others

Our Customers Recently Viewed

0 items • Updated a few seconds ago

Search this list...

Customer Name

You haven't viewed any Our Customers recently.

Information

* Customer Name

Owner

Hazari Ajay Kumar

Customer id

* Phone

Email id

Address

Cancel Save & New Save

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 OurCustomer

Urban Color **Our Customers** ▾ Consultants ▾ Retailers ▾ others ▾

Our Customers
Recently Viewed ▾

2 items • Updated a few seconds ago

New Import Change Owner


Search this list...

Customer Name ▾

1	<input type="checkbox"/> Suresh	▾
2	<input type="checkbox"/> Kamal	▾

Our Customer
Suresh

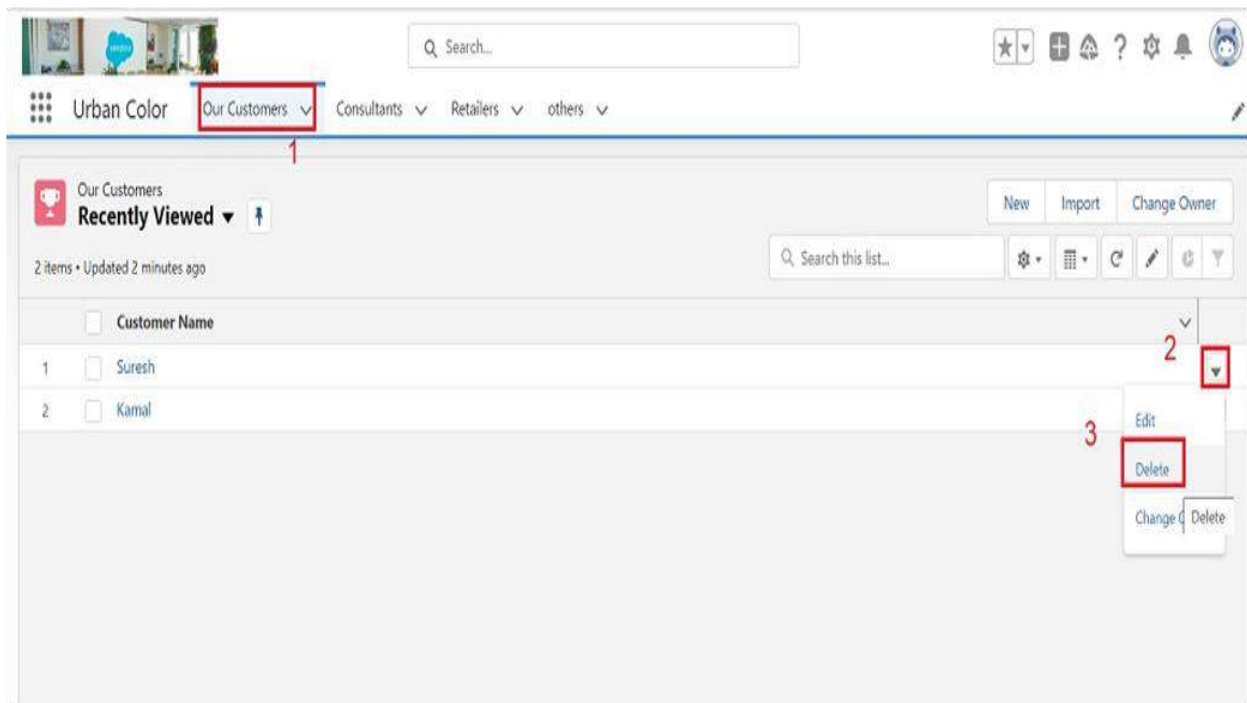
Related **Details**

Customer Name	Suresh	Owner	 Hazari Ajay Kumar
Customer id	5		
Phone	97583873728		
Email id	suresh@gmail.com		
Address	Hyderbad		
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 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.

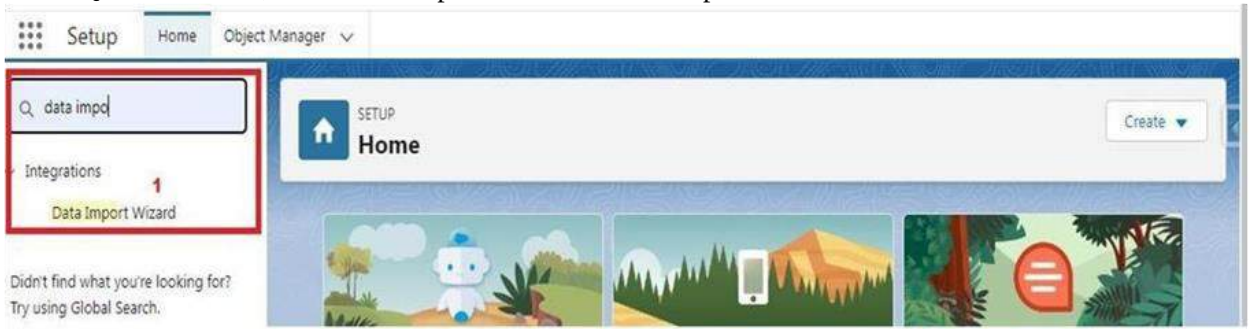


10. Import Data

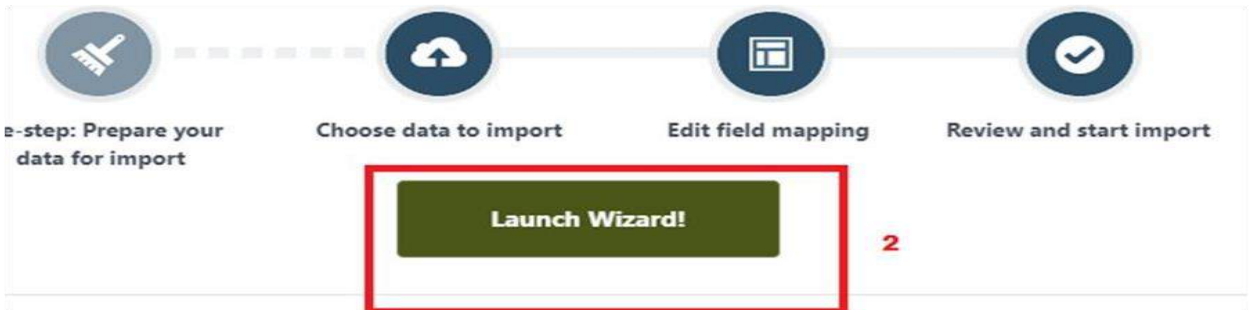
Data Import Wizard—this tool, accessible through the Setup menu, lets you import data in common standard objects, such as contacts, leads, accounts, as well as data in custom objects.

To Import Data

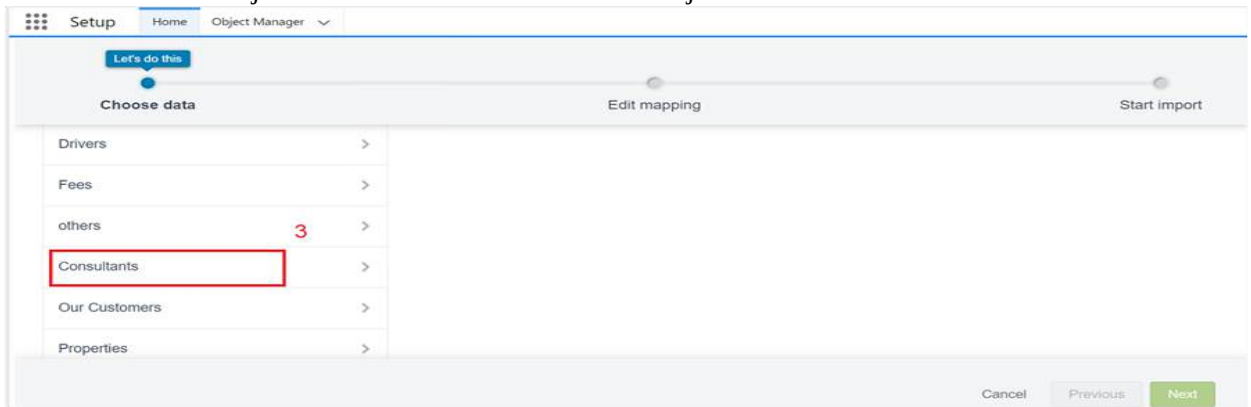
1. From Setup, click the Home tab.
2. In the Quick Find box, enter Data Import and select Data Import Wizard



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.

What kind of data are you importing? [?]

What do you want to do? [?]

Where is your data located? [?]

Standard objects	Custom objects
Attendees	>
Buyers	>

Add new records	4	>
Update existing records		>
Add new and update existing records		>

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

Choose data Edit mapping Start import

What kind of data are you importing? [?] What do you want to do? [?] Where is your data located? [?]

Standard objects	Custom objects
Attendees	>
Buyers	>
Customerss	>
Departments	> ✓

Add new records ✓

Match by: [?]
--None--

Which User field in your file designates record owners? [?]
--None--

Trigger workflow rules and processes? [?]
☐ Trigger workflow rules and processes for new and updated records

Drag CSV file here to upload

CSV

5

Cancel Previous **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

Setup Home Object Manager

Almost done

Choose data Edit mapping Start import

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

Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	Consultant Name	Consultant Name	Dev Raj	Ajith	Babu
Change	Mobile Number	Mobile Number	984638732	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

Cancel Previous **Next**

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

Great job!

Choose data Edit mapping Start import

Review & Start Import
Review your import information and click Start Import.

Your selections:

- Consultants ✓
- Add new records ✓
- Consultants - Sheet1 (2).csv ✓

Your import will include:

Mapped fields
7

Your import will not include:

Unmapped fields
0

Cancel Previous **Start Import**

9. Click OK on the popup.

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

OK

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

There are 4 types of report formats in Salesforce:

1. Tabular Reports:

This is the most basic report format. It just displays the row of records in a table with a grand total. While easy to set up they can't be used to create groups of data or charts and also cannot be used in Dashboards. They are mainly used to generate a simple list or a list with a grand total.

2. Summary Reports:

It is the most commonly used type of report. It allows grouping of rows of data, view subtotal, and create charts.

3. Matrix Report:

It is the most complex report format. Matrix report summarizes information in a grid format. It allows records to be grouped by both columns and rows. It can also be used to generate dashboards. Charts can be added to this type of report.

4. Joined Reports:

These types of reports let us create different views of data from multiple report types. The data in joined reports are organized in blocks. Each block acts as a subreport with its own fields, columns, sorting, and filtering. They are used to group and show data from multiple report types in different views.

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 ClickStart 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.

1

2

Urban Color

Apps

Items

Asset Action Sources

Data Use Purpose

Operating Hours

Our Customers

Return Orders

View More

Optimizer

ADMINISTRATION

Users

Data

Email

PLATFORM TOOLS

Subscription Management

Apps

Feature Settings

Home

Object Manager

Create

Get Started with Einstein Bots

Mobile Publisher

Real-time Collaborative Docs

Most Recently Used

10 items

NAME

TYPE

OBJECT

Customer Details

Custom Field Definition

Consultant

Urban Color

Our Customers

Consultants

Retailers

others

1

Reports

Dashboards

Recent

3 items

Search recent reports...

New Report

New Folder

REPORTS

Report Name

Description

Folder

Created By

Created On

Subscribed

2

REPORT

New Consultants Report

Consultants

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.

Consultant: Consultant Name

Delivery Type

Products

Payment

1

2

3

4

5

6

7

8

9

Dev Raj

Self Pickup

Lipstick

Cash

Ajith

Courier

Compact

Upi

Babu

Self Pickup

Face Pack

Credit Card

Chitra

Courier

Eye Liner

Debit Card

Sivathi

Courier

Nail Polish

Upi

Prasad

Self Pickup

Eye Liner

Upi

Ajay Kumar

Courier

Lip Balm

Debit Card

Shankar

Self Pickup

Face Pack

Cash

Sandeep

Courier

Eye Liner

Upi

Update Preview Automatically

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
New Consultants Report						
Consultants						
Previewing a limited number of records. Run the report to see everything.						
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	Sivathi	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

Outline ▾ Filters ▾

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

Fields

Groups

GROUP ROWS

Add group... Q

Columns ▾

Add column... Q

Consultant: Consultant Name X

Delivery Type X

Products X

Payment X

	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

↑ Sort Ascending

↓ Sort Descending

Group Rows by This Field

Group Columns by This Field

Bucket This Column

Show Unique Count

← Move Left

→ Move Right

X Remove Column

Edit Bucket Column

* Field

Payment X

* Bucket Name

Payment type

All Values (4)

Unbucketed Values (4)

☐ Bucket remaining values as Other

Search Values

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

Add Bucket

Move To ▾

Cancel

Apply

Edit Bucket Column

* Field: X

* Bucket Name:

All Values (4)

Bucket Name

2

Unbucketed Values (4)

1

Add Bucket

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

☐ Bucket remaining values as Other

Move To ▼

Cancel

Apply

Edit Bucket Column

* Field: X

* Bucket Name:

All Values (4)

Net Banking (0)

Cash (0)

Unbucketed Values (4)

1

Add Bucket

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

☐ Bucket remaining values as Other

Move To ▼

Cancel



Apply



Edit Bucket Column

* Field X

* Bucket Name


All Values (4)

Net Banking (0)  

Cash (0)  

Unbucketed Values (4)

☐ Bucket remaining values as Other

Search Values 



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 X

* Bucket Name


All Values (4)

Net Banking (0)  

Cash (0)  

Unbucketed Values (4)

☐ Bucket remaining values as Other

Search Values 

VALUE	BUCKET
<input checked="" type="checkbox"/> Credit Card	
<input checked="" type="checkbox"/> Debit Card	
<input type="checkbox"/> Net Banking	
<input type="checkbox"/> Cash	
<input type="checkbox"/> Unbucketed Values	
<input type="checkbox"/> New Bucket	

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

Add Bucket

Move To



Search Values



☐ VALUE

BUCKET

☐ Credit Card

Net Banking

☐ Debit Card

Net Banking

☐ Upi

Net Banking

☒ Cash

All Values (4)

Net Banking (3)



Cash (1)



Unbucketed Values (0)

☐ Bucket remaining values as Other

Add Bucket

Move To



Search Values



☒ VALUE

BUCKET

☒ Cash

Cash

Cancel

Apply

Edit Bucket Column

* Field

Payment



* Bucket Name

Payment type

All Values (4)

Net Banking (3)



Cash (1)



Unbucketed Values (0)

☐ Bucket remaining values as Other

Add Bucket

Move To



Search Values



☒ VALUE

BUCKET

☒ Cash

Cash

Cancel

Apply

Edit Bucket Column

* Field

Payment
✕

* Bucket Name

Payment type

All Values (4)

Net Banking (3)
✎
🗑

Cash (1)
✎
🗑

Unbucketed Values (0)

☐ Bucket remaining values as Other

Add Bucket

Move To ▼

Search Values
🔍

<input checked="" type="checkbox"/> VALUE	BUCKET
<input checked="" type="checkbox"/> Cash	<div style="display: flex; align-items: center;"> Cash ✎ 🗑 </div>

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 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.

New Dashboard

* Name 3

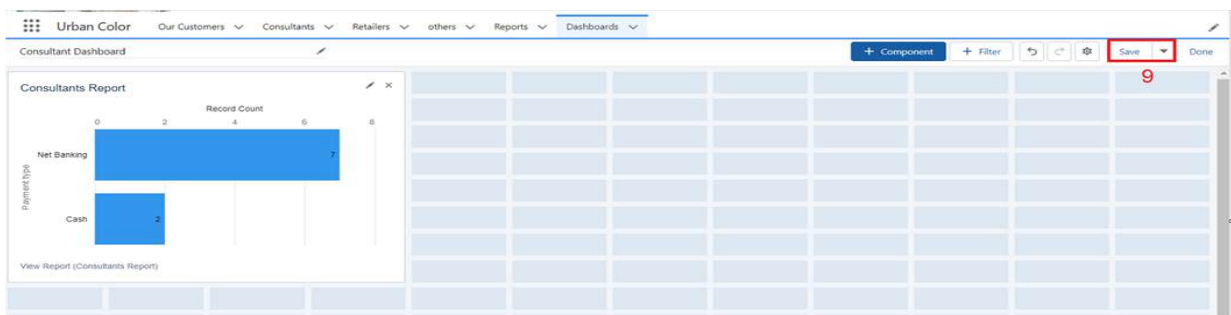
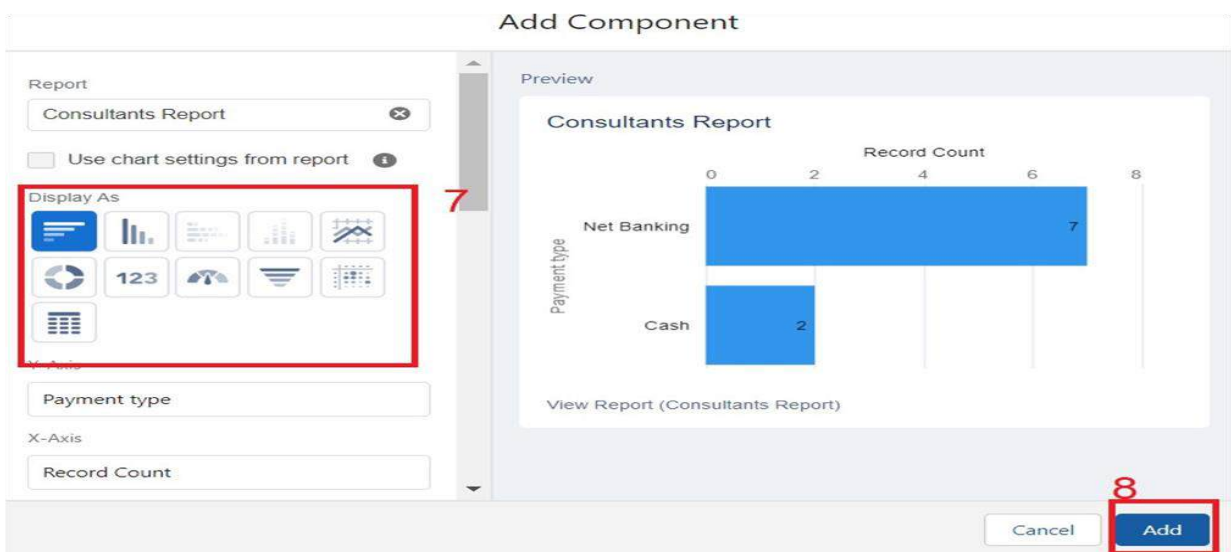
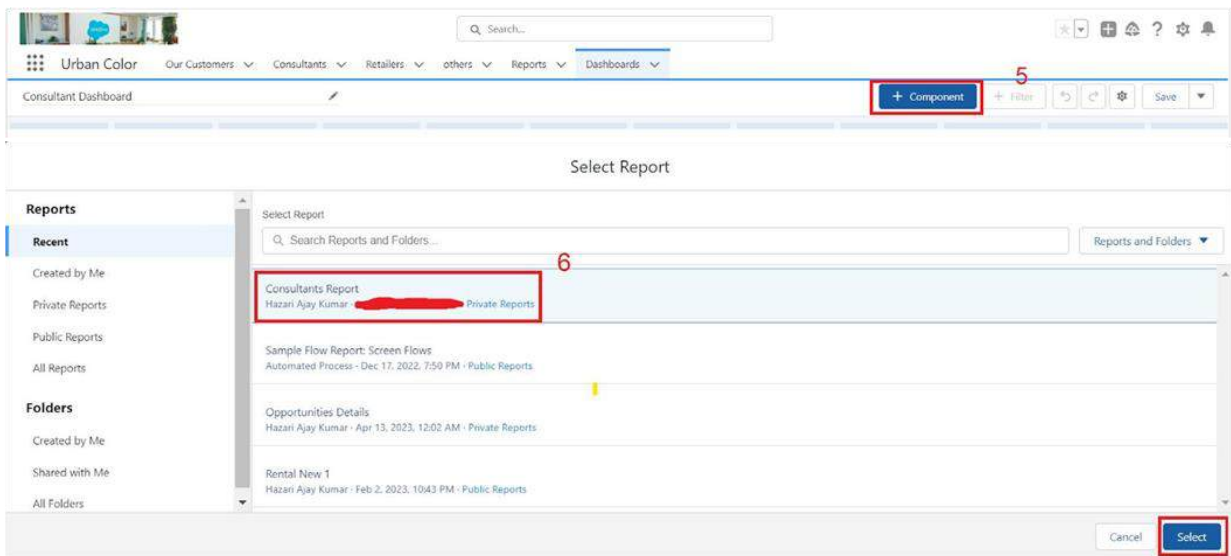
Consultant Dashboard

Description

Folder

Private Dashboards

Ca



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

