

Cosmetic Store Management

1. Introduction

1.1 Project Overview

This document outlines the project documentation for a Salesforce-based cosmetic store management system. The system is designed to streamline operations, provide valuable insights, and enhance decision-making for the cosmetic store.

1.2 Project Objectives

- Import and manage consultant data, including ConsultantName, DeliveryType, Products, and Payment details.
- Create reports to analyze consultant performance, delivery efficiency, product popularity, and payment trends.
- Develop interactive dashboards to visualize key metrics and trends.

1.3 Project Scope

The project scope includes the following key components:

- Data import and validation
- Report creation and customization
- Dashboard design and development

2. System Requirements

2.1 Hardware Requirements

- Sufficient computing power to handle data processing and reporting.
- Adequate storage capacity for data storage and backups.
- Internet connectivity for accessing Salesforce and external systems.

2.2 Software Requirements

- Salesforce platform with appropriate licenses and permissions.
- Data Loader for importing data into Salesforce.
- Report Builder for creating custom reports.
- Dashboard Builder for designing interactive dashboards.

3. Data Import and Validation

- **Data Loader:** Use Salesforce Data Loader to import data from external sources (e.g., spreadsheets, databases) into the custom objects.
- **Data Validation:** Implement data validation rules to ensure data integrity and consistency during import.

4. Reporting and Analysis

- **Standard Reports:** Utilize Salesforce's standard reports to analyze consultant data, including ConsultantName, DeliveryType, Products, and Payment details.
- **Custom Reports:** Create custom reports using Report Builder to address specific business needs.
- **Report Types:** Define report types to specify the objects and fields included in reports.

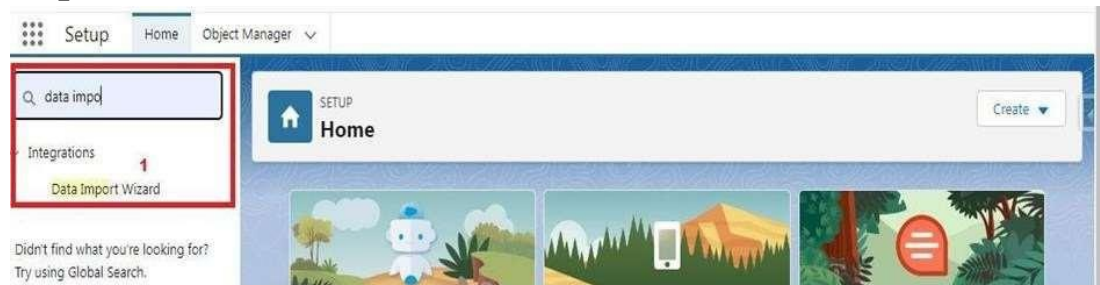
5. Dashboard Development

- **Dashboard Builder:** Use Salesforce's Dashboard Builder to create interactive dashboards.
- **Dashboard Components:** Utilize various components (e.g., charts, tables, metrics) to visualize data.
- **Dashboard Filters:** Apply filters to customize dashboard views based on specific criteria.

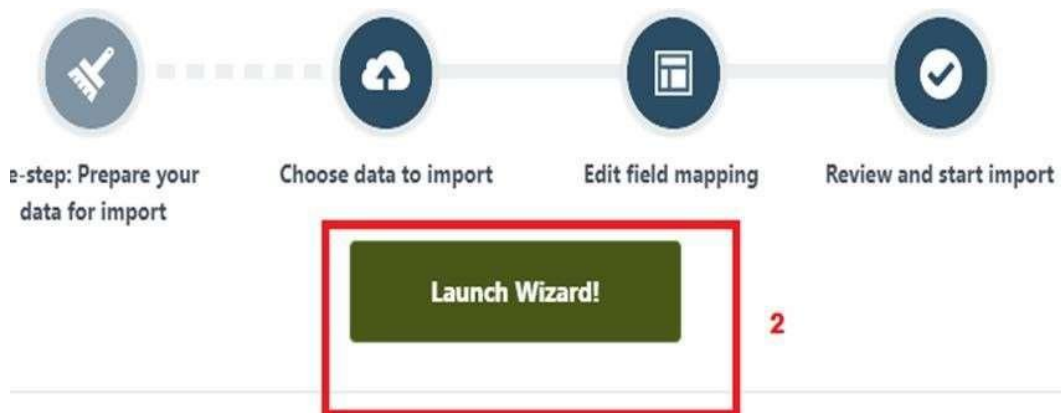
Steps for Importing Data

To Import Data

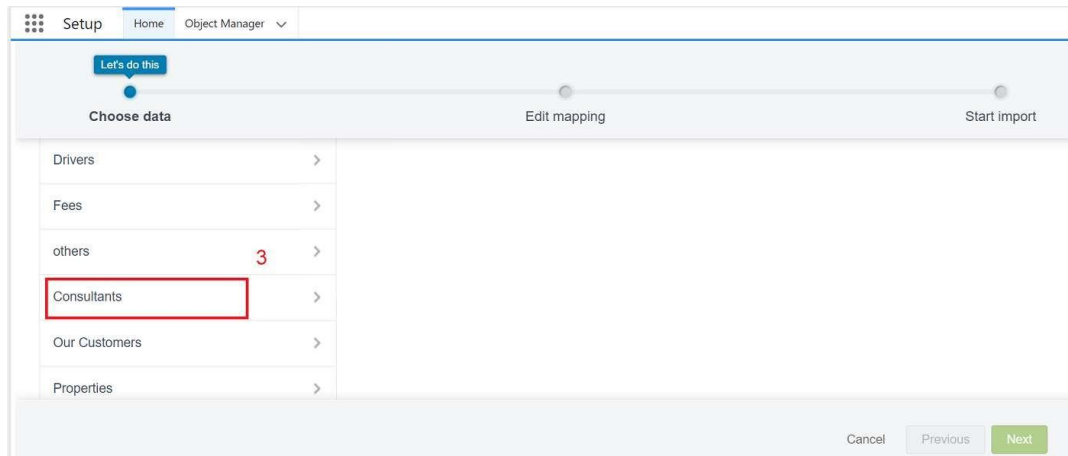
1. From Setup, click the Home tab.
2. In the Quick Find box, enter Data Import and select Data Import Wizard



3. Click Launch Wizard!



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



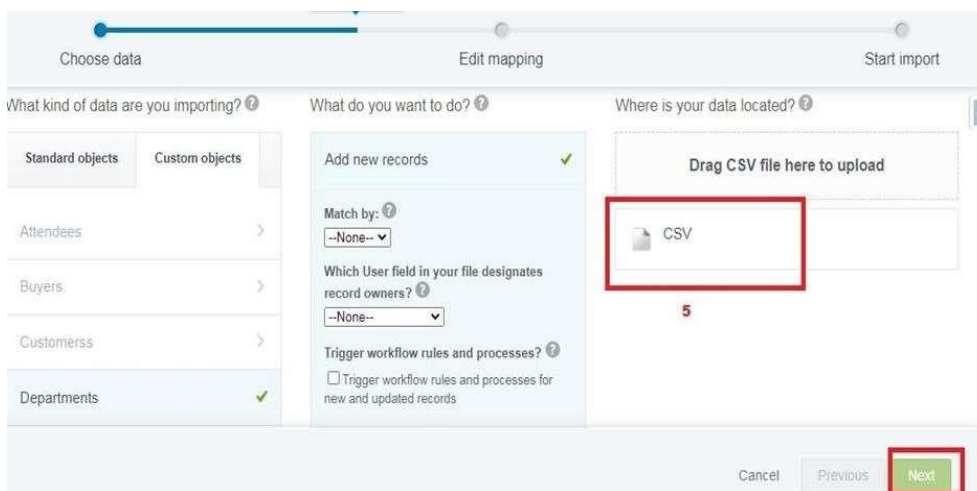
5. Select Add new records.

Import your Data into Salesforce

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



6. Click CSV and choose file Consultant_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 (Mapped

Salesforce Object), the fields are automatically mapped. Click Next.

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	784653873	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.

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
View Request	View Result	7512w00000Xqrar	6/19/2023, 11:05 PM	6/19/2023, 11:05 PM	103	52	0	9	0
							Retry Count	State Message	Status
							0		Completed

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

Note - Do Field mapping carefully.

Steps for Creating Report

Create Report

1. Click App Launcher
2. Select Urban Color App
3. Click reports tab
4. Click New Report.



REPORT ▾
New Consultants Report ✎ Consultants

⏮ ⏪ ⏩ ⏭ Add Chart Save & Run Save ▾ Close Run

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

Outline Filters

Groups
GROUP ROWS
Add group... 🔍

Columns
Add column... 🔍
Consultant: Consultant Name ✕
Delivery Type ✕
Products ✕
Payment ✕

	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

Edit Bucket Column

* Field Payment ✕ * Bucket Name Payment type

All Values (4)

Net Banking (0) ✎ 🗑

Cash (0) ✎ 🗑

Unbucketed Values (4)

☐ Bucket remaining values as Other

Add Bucket

Search Values 🔍

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

Move To ▾

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	

Edit Bucket Column

* Field: X

* Bucket Name:

All Values (4)

- Net Banking (3)
- Cash (0)
- Unbucketed Values (1)

☐ Bucket remaining values as Other

Search Values

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

Edit Bucket Column

* Field: × * Bucket Name:

All Values (4)

Net Banking (3)

Cash (1)

Unbucketed Values (0)

☐ Bucket remaining values as Other

Add Bucket

Search Values

<input checked="" type="checkbox"/>	VALUE	BUCKET
<input checked="" type="checkbox"/>	Cash	Cash

Move To ▼

5. In Group Rows Add Payment Type Bucket Field.

6. Click refresh

7. Click Save and Run

8. Give report name – Consultant report

9. Click Save

Steps for Creating Dashboard

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

Add Component

Report: Consultants Report

☐ Use chart settings from report

Display As

Payment type

X-Axis: Record Count

Preview: Consultants Report

Record Count

Net Banking: 7

Cash: 2

View Report (Consultants Report)

Cancel Add

