

Cosmetic Store Management

Description :

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

Summary :

1. Key Features:Customer Management:

- **Contacts & Accounts:** Efficiently manage customer details, including contact information, purchase history, and preferences.
- **Customer Segmentation:** Segment customers based on various criteria such as purchase frequency, product preference, and location for targeted marketing.

2. Product Management:

- **Product Catalog:** Maintain an up-to-date catalog of cosmetic products with detailed descriptions, pricing, and availability.
- **Inventory Tracking:** Monitor stock levels, set reorder points, and track inventory turnover to ensure optimal stock levels.

3. Sales Management:

- **Order Processing:** Automate the order management process, including order creation, status tracking, and invoicing.
- **Sales Analytics:** Generate reports and dashboards to analyze sales trends, identify top-selling products, and forecast future sales.

4. Marketing & Promotions:

- **Campaign Management:** Create and manage marketing campaigns, including email promotions, discounts, and special offers.
- **Customer Engagement:** Use Salesforce tools to engage with customers through personalized offers and targeted marketing.

5. Customer Service:

- **Case Management:** Track and resolve customer service issues and complaints efficiently.
- **Knowledge Base:** Provide customers with access to a self-service portal for FAQs, product information, and troubleshooting.

TASKS :

1.Creating the Objects :

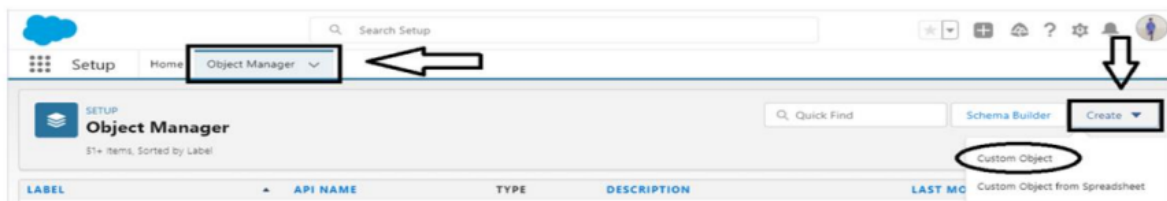
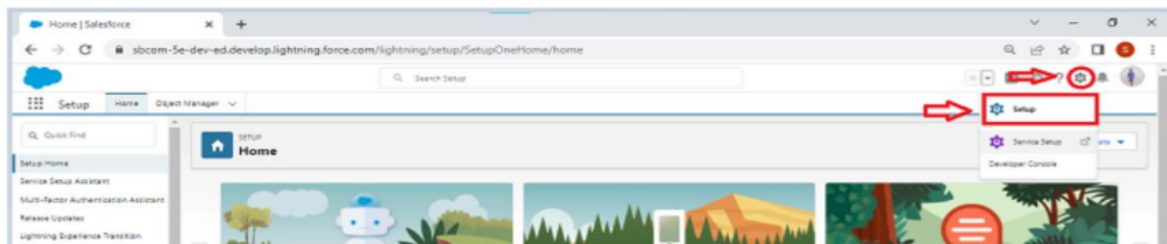
To Create an object: Creation of Objects for Urban Color, For this Urban Color, we need to create 3 objects
i.e .,OurCustomers,Consultants,Retailers,others.

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 Drop-down 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 and Click Save.
- Now create a custom tab. Click the Home tab, enter Tabs, and select Tabs.
- Under Custom Object Tabs, click New.
- For Object, select Our Customer.
- For Tab Style, select any icon.



We need to create four objects named Our customer, Consultant, Retailer, Others. For creating the other 3 objects, we need t follow the same procedure as mentioned above. After the completion of the object creation task, We'll move on to further steps. **Task2**

:Creating Fields and Relationship :

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

Fields in Our Customers objects :

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

Fields in Consultants objects

Fields in Consultants objects follow below data types:

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

	2)Compact 3)EyeLiner 4)FacePack 5)Lip Balm 6)Nail Polish	Multi-Picklist
7	Payment 1)Debit Card 2)Credit Card 3)UPI 4)Cash	Picklist
8	Customer details	Lookup(Our Customers Object)
9	Address	Text Long

Fields in Retailers objects

Fields in Retailers objects follow below data types:

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

	6)Nail Polish	
7	Payment 1)Debit Card 2)Credit Card 3)UPI 4)Cash	Picklist
8	Customer Details	Master-Detail Relationship (Our Customers Object)

Fields in Others objects

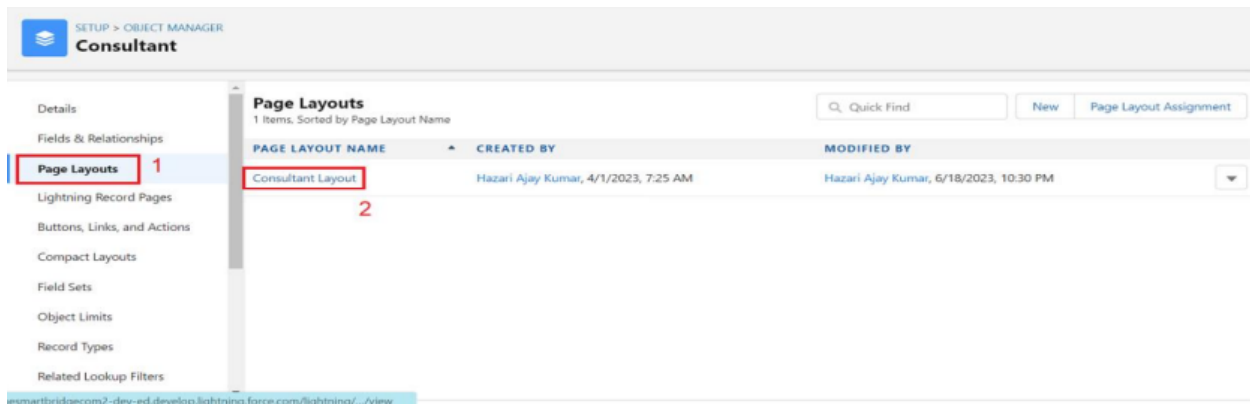
Fields in Other objects follow below data types:

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

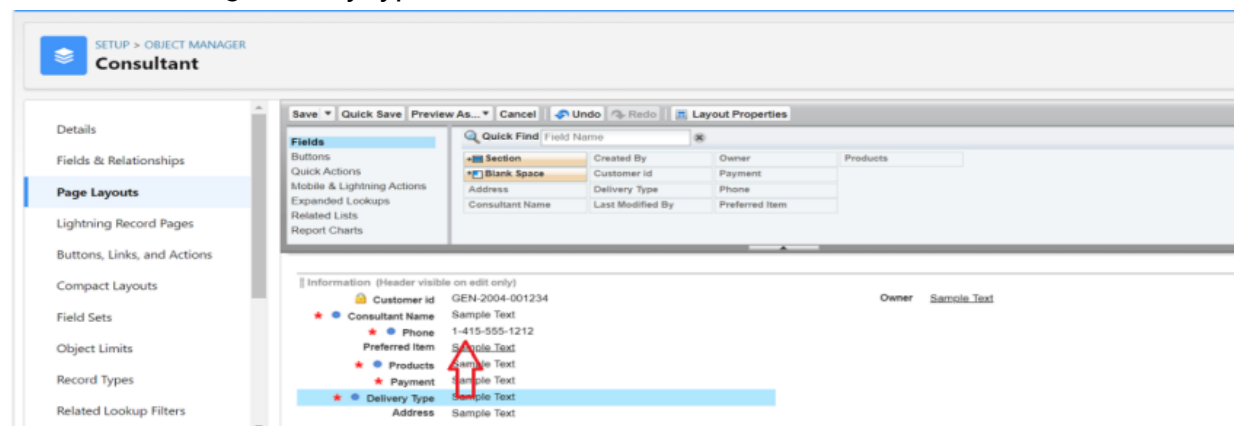
- In the Cosmetic Store Management System built on Salesforce, fields and relationships are designed to streamline operations and enhance data management. Key fields include customer details (e.g., contact information and purchase history), product specifics (e.g., SKU, price, and inventory levels), order details (e.g., order status and shipping info), marketing campaign attributes, and case management elements. Relationships are structured to connect these fields efficiently: customers can have multiple orders and cases, each order can include multiple products, and products are linked to inventory and suppliers.

Task 3: *Page Layout creation :*

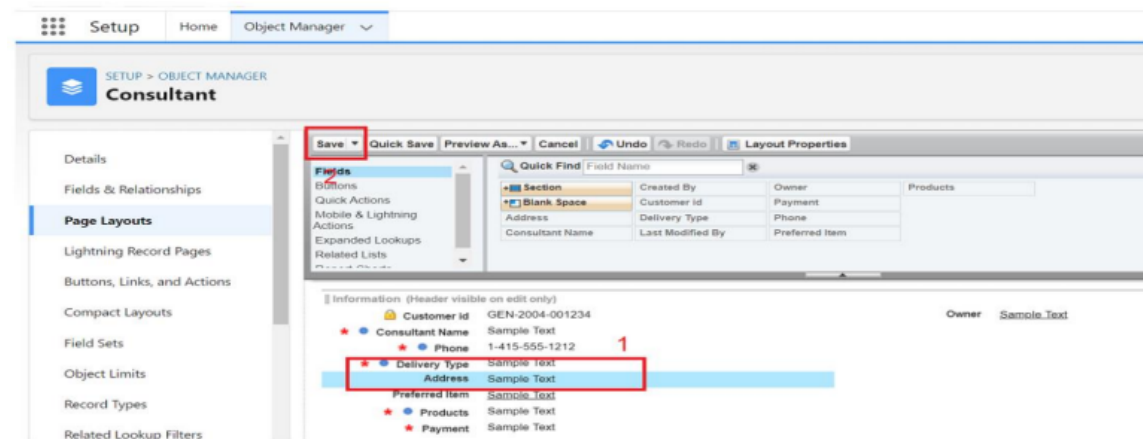
1. From the Salesforce setup menu, go to "Object Manager" and select the Consultants object.
2. Click on "Page Layouts" in the left sidebar. This will display a list of available page layouts for the selected object.
3. Select the Consultant Layout page layout.



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



5. Click on Save.



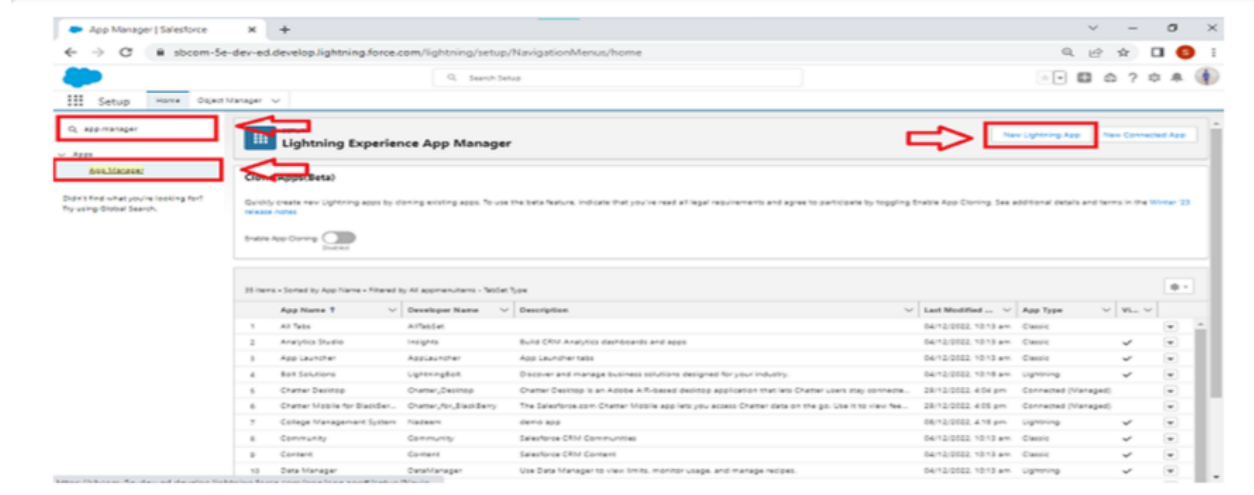
- Creating a page layout in Salesforce involves navigating to the object manager, selecting the relevant object, and either creating a new layout or editing an existing one. You can design the layout by dragging and dropping fields, adding sections and related lists, and including buttons or links as needed. Customize field properties and section settings to suit user needs, then save and assign the layout to specific profiles or record types. Finally, preview and test the layout to ensure it is functional and meets user

requirements.

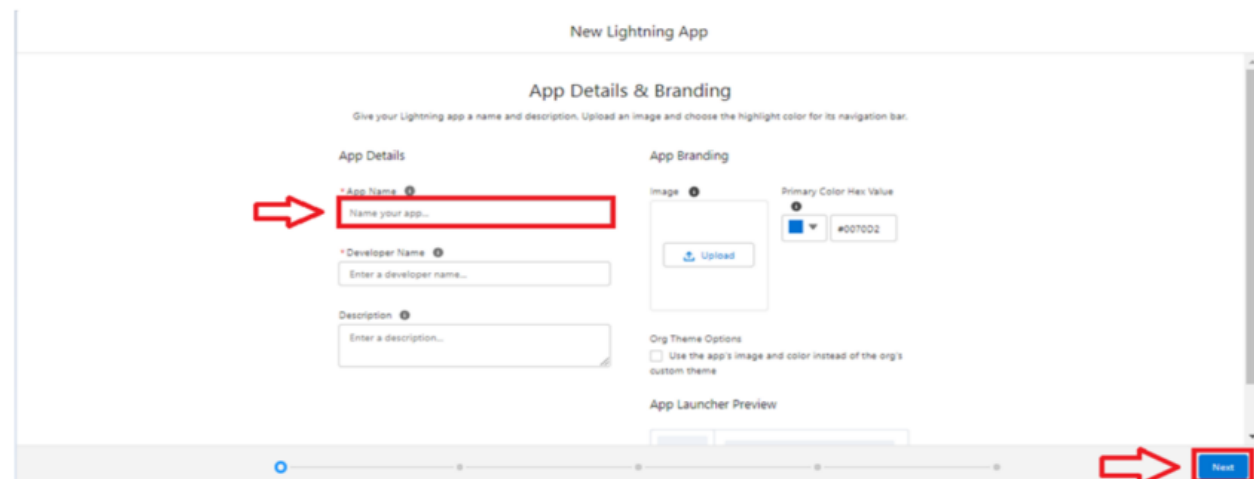
► **Task 4 : Creation of a Lightning App :**

- 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

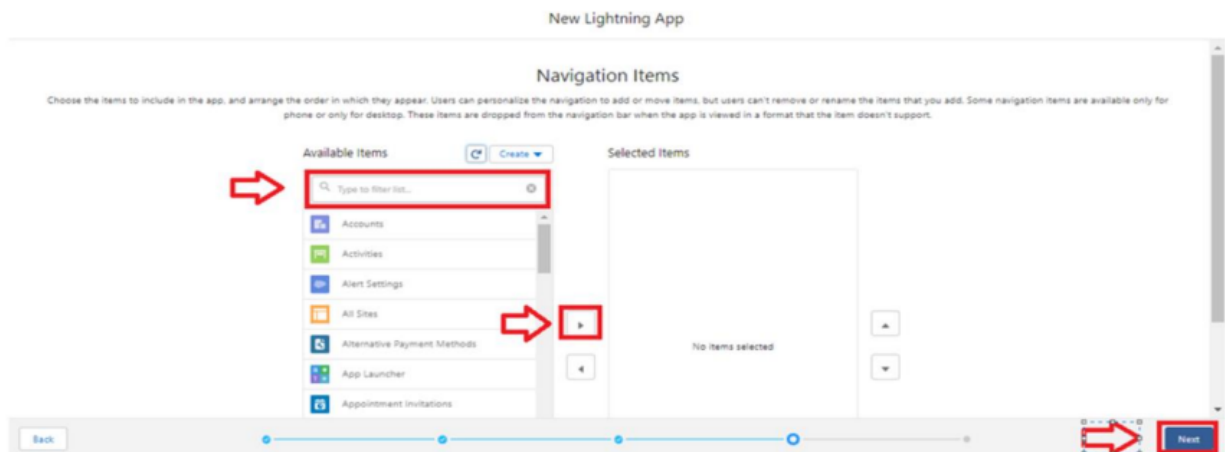
- To create a lightning app page: 1.Go to the setup page --> search “app manager” in quick find --> select “app manager” --> click on New lightning App.



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.

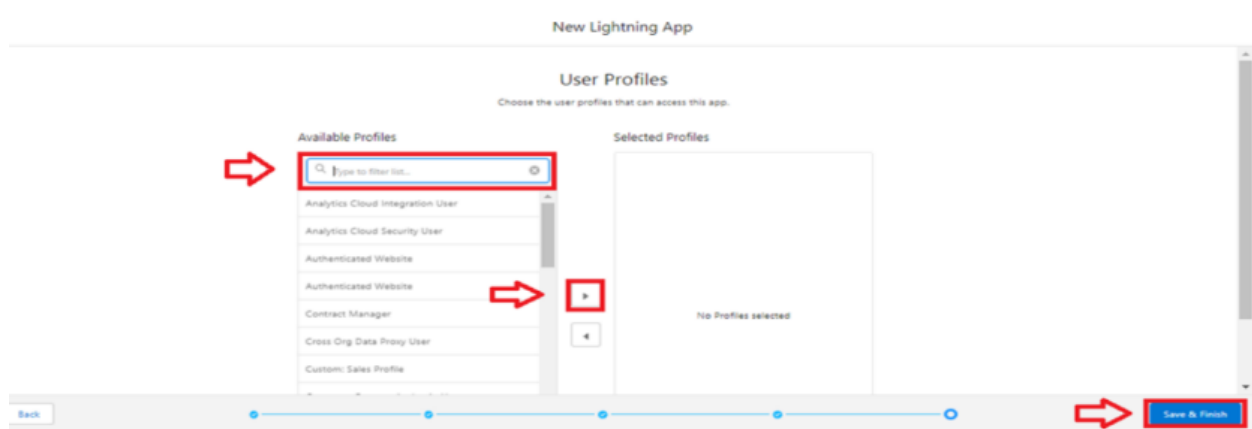


3. To Add Navigation Items:



4. Select the items (Our Customers, Consultants, Retailers, Others, Reports, Dashboards) from the search bar and move them 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.

► Task 5: Creating Profiles :

- 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, Visual force page access, Page layouts, Record Types, Login hours & Login IP ranges.

Creating the 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 and Click Save.
- While still on the Store Supervisor profile page, then click Edit.
- Scroll down to Custom App Settings and give access for Urban Color.

To create a new profile:

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

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

The screenshot shows the Salesforce Setup interface for the 'Store Supervisor' profile. The left sidebar contains a search bar with 'profi' and a list of users including 'Profiles'. The main content area shows the profile name 'Store Supervisor' and a description: 'Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing the user's profile. If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record type available to users with this profile.' Below this is a list of enabled permissions: 'Login IP Ranges (R)', 'Enabled App Cross Access (R)', 'Enable Visualforce Page Access (R)', 'Enabled External Data Source Access (R)', 'Enabled External Custom Visual Access (R)', 'Enabled Custom Metadata Type Access (R)', 'Enabled Custom Setting Listeners Access (R)', 'Enabled Service Presence Status Access (R)', and 'Enabled Custom Permissions (R)'. The 'Profile Detail' section shows the name 'Store Supervisor', user license 'Salesforce', and a checked 'Custom Profile' checkbox. Below this is a table of object permissions.

Object	Read	Write	Read Only	Write Only
Person__Lightning__	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Community (standard__Community)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Content (standard__Content)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Data Manager (standard__DataManager)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Digital Experiences (standard__SalesforceCMS)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lightning Usage App (standard__LightningUsageApp)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
UWC LEARNING (UWC_LEARNING)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Marketing (standard__Marketing)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Queue Management (standard__QueueManagement)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rental Management (Rental_Management)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Service Provider Access	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tab Settings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Urban Color (Urban_Color)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Vehicle Management (Vehicle_Management)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
WDC (standard__Work)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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

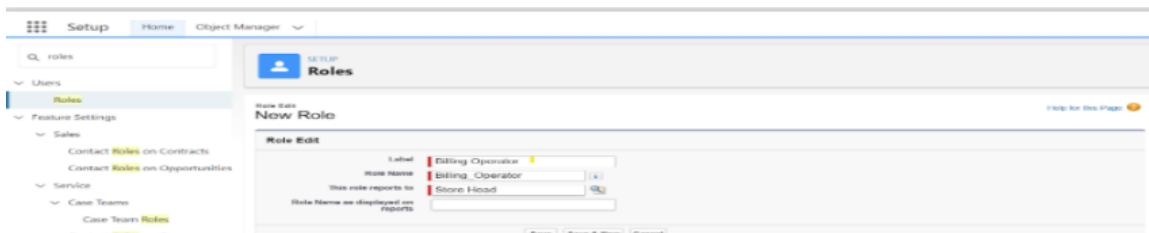
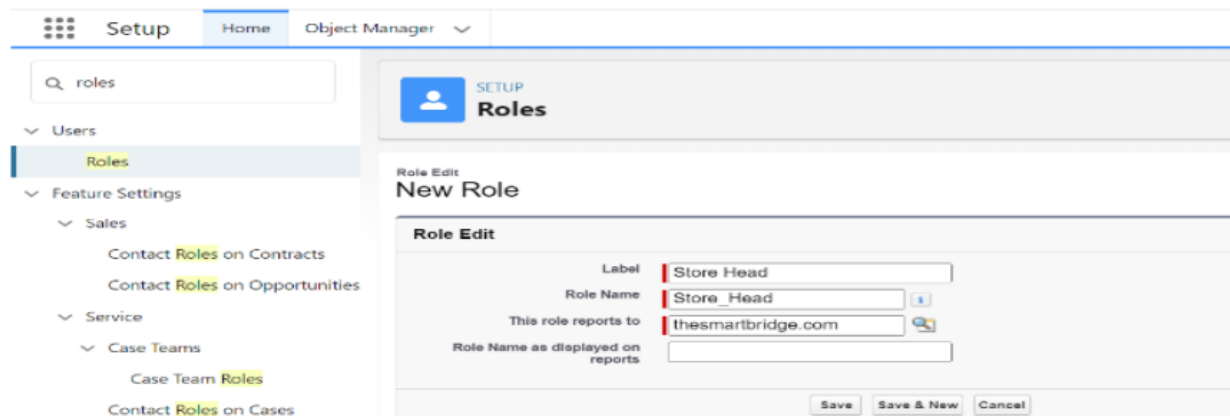
4. Click on Save.

5. Similarly, Create an operator profile, Clone Salesforce Platform user, and give access only to Billing Operator.

Task 6: Setting up 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.



- In Salesforce, roles define the hierarchy and access levels for users within an

organization. Roles determine the visibility of records and data sharing based on an employee's position and responsibilities. By establishing a role hierarchy, Salesforce allows users to access and manage records owned by users in roles below them in the hierarchy. This ensures that managers can oversee the work of their subordinates while maintaining data security and privacy. Roles are crucial for configuring access controls, enabling effective data sharing, and facilitating proper reporting within Salesforce.

► **Task 7 : Creation of an User :**

- In Salesforce, a user represents an individual who has access to the Salesforce platform and its functionalities. Each user is assigned a unique username, and their access level and permissions are defined by their profile and role within the organization. Users can perform tasks such as managing records, running reports, and collaborating with team members based on their assigned permissions. Salesforce administrators configure user settings, including login credentials, security settings, and access to various features and data, ensuring that users can efficiently and securely perform their job functions.

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 License As Salesforce.
6. Select a profile as Store Supervisor.
7. Check Generate a 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 license, profiles) --> save.

Setup Home Object Manager

Q 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

User Edit Save Save & New Cancel

General Information Required Information

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 ☒
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--

Setup Home Object Manager

Q 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

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

Task 8 : Creating/Modifying Records :

● Creating or modifying records in Salesforce involves navigating to the relevant object tab, clicking “New” to create a record or “Edit” to update an existing one. For creating records, users fill out the necessary fields and click “Save” to store the new data. For modifications, users locate the record, make the desired changes in the editable fields, and then click “Save” to apply the updates. This process ensures accurate and up-to-date information within the Salesforce system.

Steps to Create a Record:

- 1. Navigate to the Object Tab:** ▪ Log in to Salesforce and go to the relevant object tab (e.g., Accounts, Contacts, Opportunities).
- 2. Click “New”:** ▪ On the object’s home page or list view, click the “New” button to initiate the creation of a new record.
- 3. Enter Record Information:** ▪ Complete the fields in the record form with the required and optional data. This may include details like names, addresses, dates, and other

relevant information.

4. Save the Record: ▪ Once all necessary information is entered, click “Save” to create and store the new record in Salesforce.

Steps to Modify a Record:

1. Find the Record:

▪ Locate the record you want to modify by using the object’s list view, search function, or related lists.

2. Open the Record:

▪ Click on the record’s name to open it and view its details.

3. Click “Edit”:

▪ In the record’s detail view, click the “Edit” button to enable editing mode.

4. Update Record Information:

▪ Make the necessary changes to the fields as required. Ensure all required fields are correctly filled out.

5. Save the Changes:

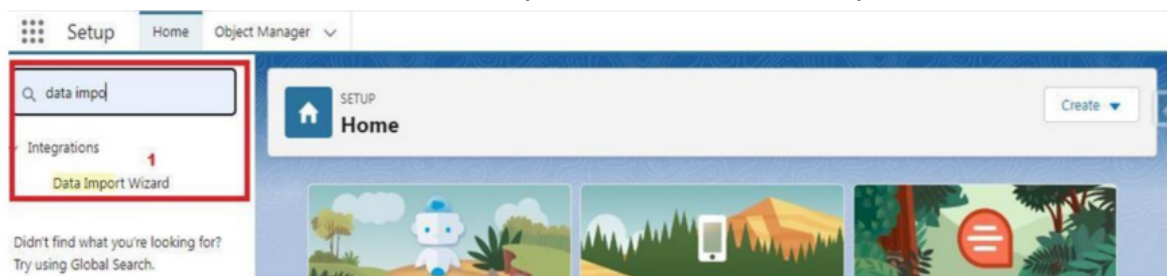
▪ After making the updates, click “Save” to apply and store the modifications.

These steps ensure that records are properly created and updated, maintaining accurate and current data in Salesforce.

► **Task 9: Importing 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.

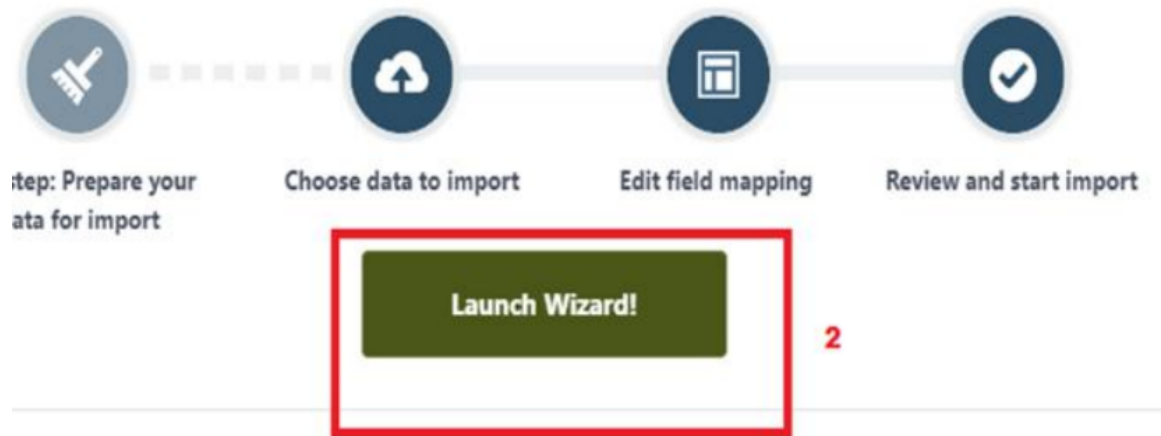
1. From Setup, click the Home tab.

2. In the Quick Find box, enter Data Import and select Data Import Wizard.



3. Click Launch Wizard!

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.

Choose data

Edit mapping

Start import

What kind of data are you importing?

Standard objects

Custom objects

Attendees

Buyers

Customers

Departments

What do you want to do?

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

Where is your data located?

Drag CSV file here to upload

CSV

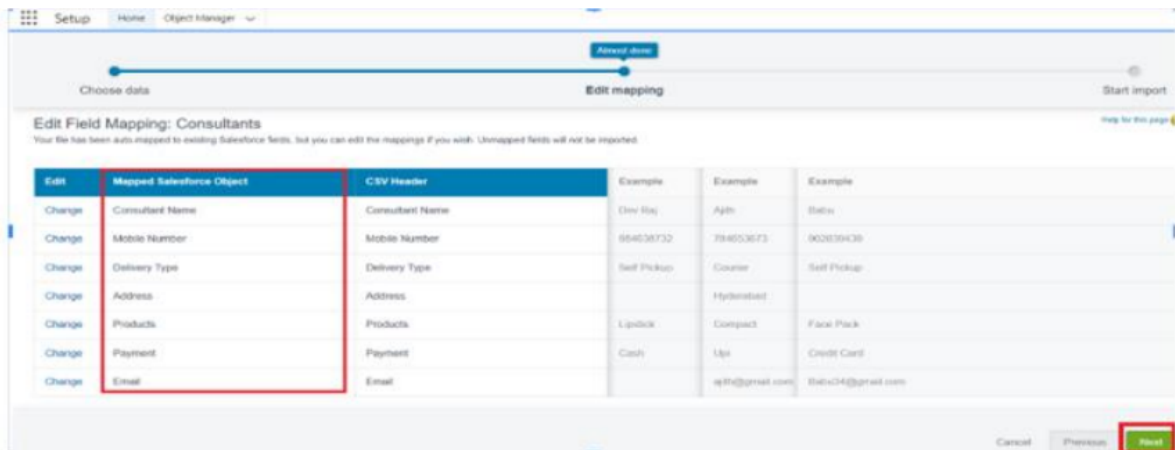
5

Cancel

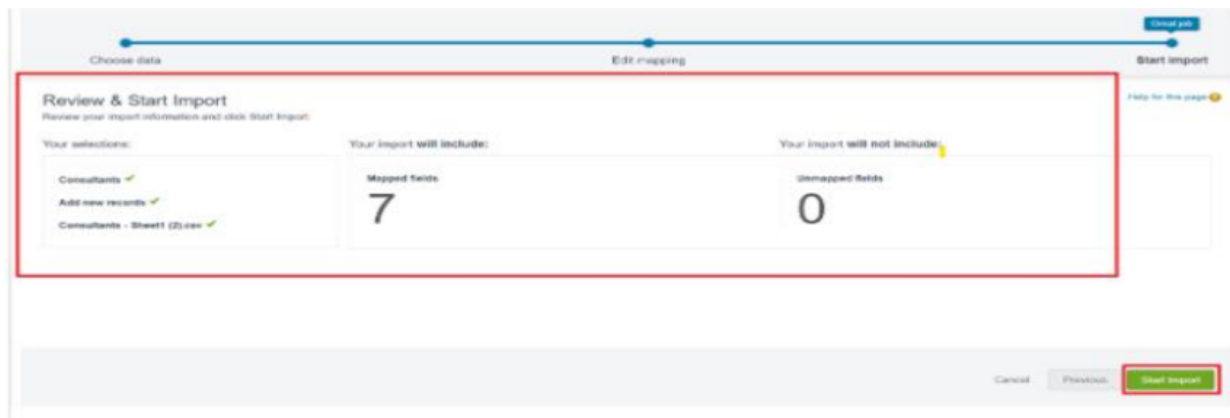
Previous

Next

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



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. 11. Make sure you have 0 records under the records failed column. Note - Do Field mapping carefully.

Task 10 :Accessing Reports :

Creating Report :

1. Click App Launcher
2. Select Urban Color App
3. Click reports tab
4. Click New Report.
5. Click the report type as Consultants Click Start report.
6. Customize your report, in Columns select - ConsultantName, Delivery type, Products, Payment.
7. Click on the drop-down option on the payment column and select Bucket this column.

8. Bucket Name as Payment type

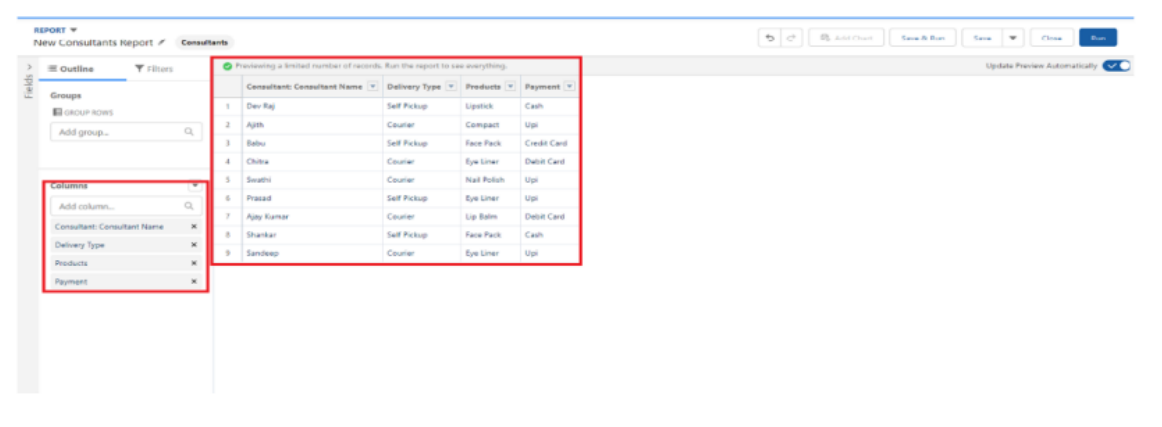
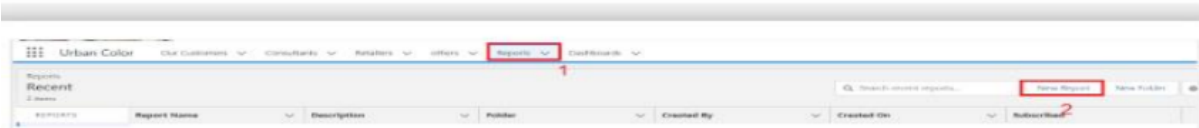
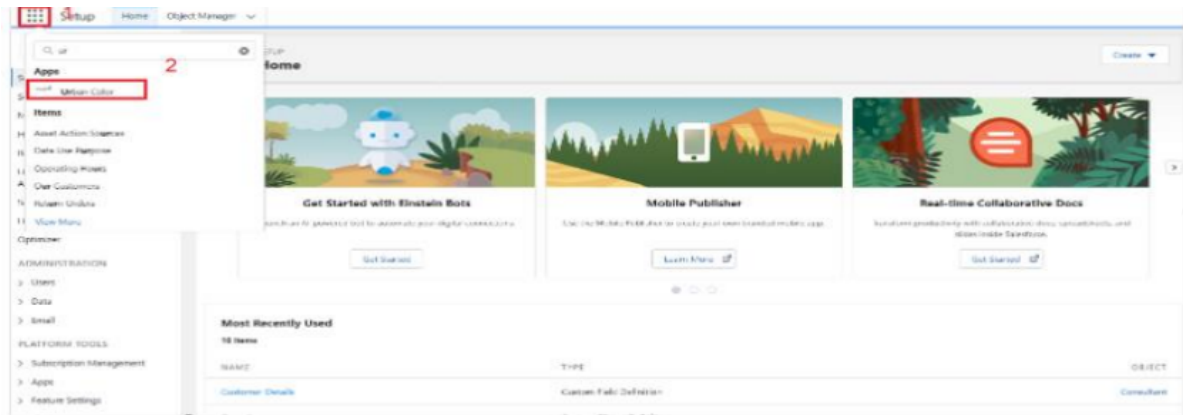
9. Click on Add Bucket and name it as NetBanking

10. Click on Add Bucket and name it as Cash

11. Now Click on All Values and select Credit card, Debit card, Ups, and Move to Net Banking.

12. Now Click on All Values again and select Cash and Move to Cash.

13. Click on Apply.



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

☐ Credit Card

☐ Debit Card

☐ Upi

☐ Cash

Add Bucket

Move To ▼

Cancel

Apply

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

☐ Credit Card

☐ Debit Card

☐ Upi

☐ Cash

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)

☐ Bucket remaining values as Other

Add Bucket

Search Values 🔍

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

Move To ▼

Cancel

Apply

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 ▼

14. In Group Rows, Add Payment Type Bucket Field.

15. Click refresh

16. Click Save and Run

17. Give the report name – Consultant report

18. Click Save

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

Payment type	Consultant: Consultant Name	Delivery Type	Products	Payment
Net Banking (7)	Ajith	Courier	Compact	Upi
	Babu	Self Pickup	Face Pack	Credit Card
	Chitra	Courier	Eye Liner	Debit Card
	Swathi	Courier	Nail Polish	Upi
	Prasad	Self Pickup	Eye Liner	Upi
	Ajay Kumar	Courier	Lip Balm	Debit Card
	Sandeep	Courier	Eye Liner	Upi
Subtotal				
Cash (2)	Dev Raj	Self Pickup	Lipstick	Cash
	Shankar	Self Pickup	Face Pack	Cash
Subtotal				
Total (9)				

Save Report

Report Name: Consultants Report

Report Unique Name: Consultants_Report_Info

Report Description:

Folder: Private Reports

Buttons: Cancel, Save

View Reports :

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

Urban Color

Reports

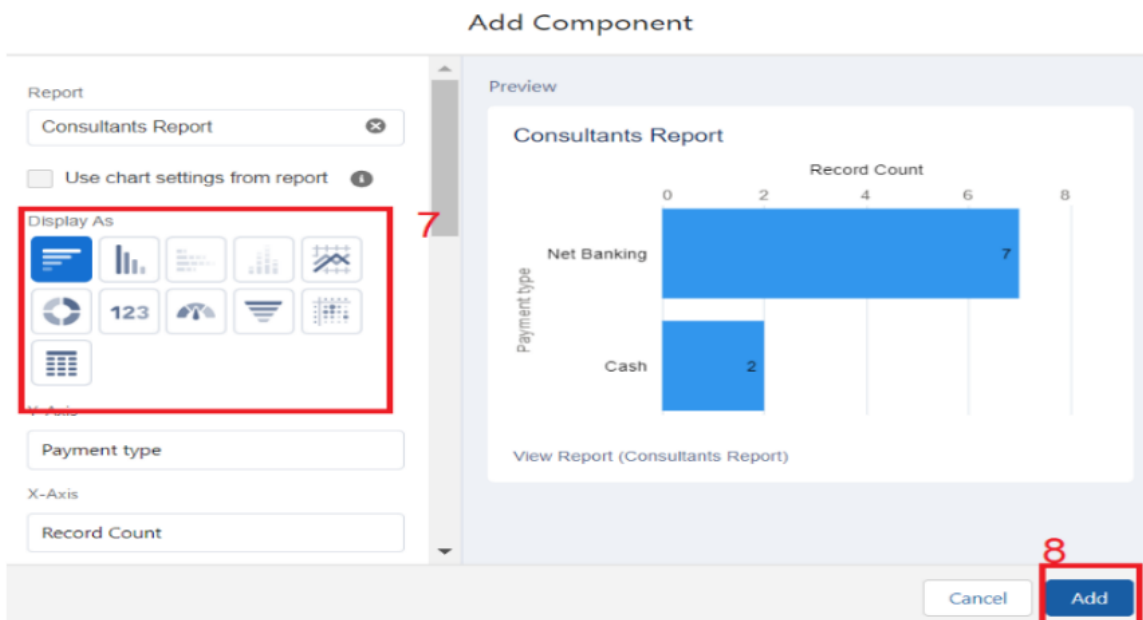
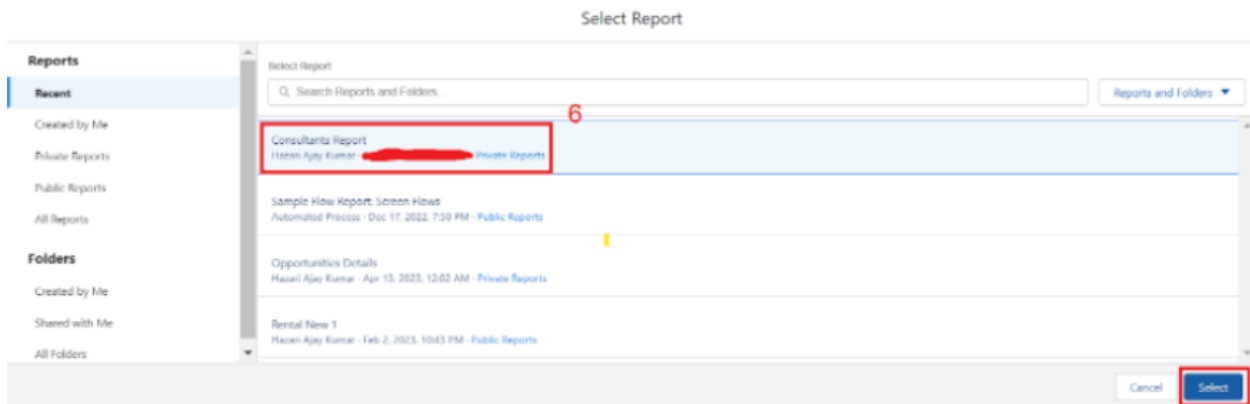
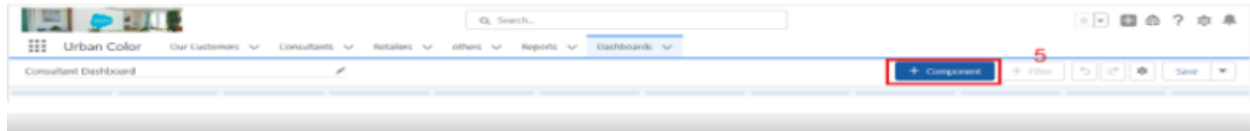
Report Name	Description	Folder	Created By	Created On	Subscribed
Consultants Report	Which flows run, what's the status of each flow, and how long it takes to complete the screens?	Private Reports	Prasad Ajay Kumar	10/15/2022, 7:50 PM	
Sample Flow Report: Screen Flow		Public Reports	Automated Process	4/12/2023, 11:48 PM	
Opportunities Details		Private Reports	Prasad Ajay Kumar	2/12/2023, 10:29 PM	
Serial Flow 1		Public Reports	Prasad Ajay Kumar		

Task 11 : Working with dashboards :

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 charts, tables, etc. as per your choice/requirement.
8. Click add.
9. Click save.

The screenshot displays the 'Urban Color' application interface. At the top, a navigation bar includes tabs for 'Our Customers', 'Consultants', 'Retailers', 'others', 'Reports', and 'Dashboards'. The 'Dashboards' tab is selected and highlighted with a red box and a red number '1'. Below the navigation bar, a 'Dashboards' section shows a 'Recent' list with a search bar and buttons for 'New Dashboard' (highlighted with a red box and red number '2') and 'New Folder'. A modal window titled 'New Dashboard' is open, containing a form with the following fields: 'Name' (required, highlighted with a red box and red number '3', containing 'Consultant Dashboard'), 'Description', and 'Folder' (set to 'Private Dashboards'). A 'Select Folder' button is next to the folder dropdown. At the bottom of the modal, there are 'Cancel' and 'Create' buttons, with the 'Create' button highlighted by a red box and a red number '4'.



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 to see a graph view of records

