

# URBAN COLOR MANAGEMENT SYSTEM

*Empowering Colorful Cities*

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## Abstract

**Urban Color Management System** is a specialized Customer Relationship Management (CRM) application designed to manage and coordinate color schemes within urban environments. With the growing emphasis on aesthetic appeal in city planning, managing the diversity of colors across various urban structures—such as buildings, public spaces, and street furniture—has become a complex task. This system provides a comprehensive solution for city planners, architects, and urban developers to maintain and update color schemes effectively.

The system offers features like color palette management, project tracking, and stakeholder communication, all within an intuitive interface. By integrating with existing urban planning tools, the Urban Color Management System enhances collaboration between different teams and ensures consistent color application across projects.

Key benefits include improved efficiency in project management, better communication among stakeholders, and the ability to maintain a cohesive visual identity across urban spaces. This system aims to contribute to the creation of visually appealing cities that reflect a harmonious blend of tradition and modernity.

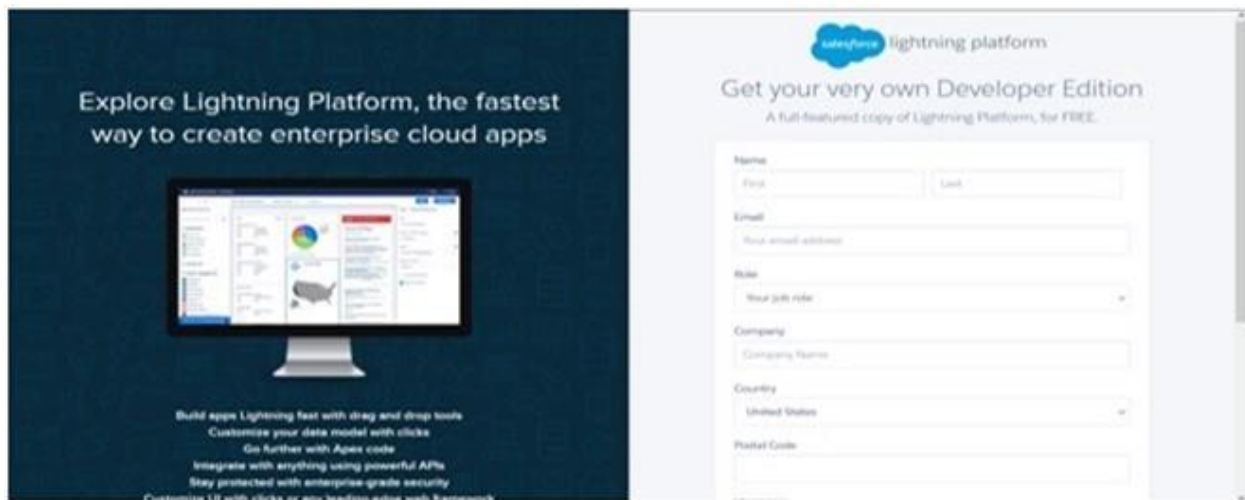
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# 1. Creating a Developer Account in Salesforce

## Step 1: Sign Up for a Developer Org

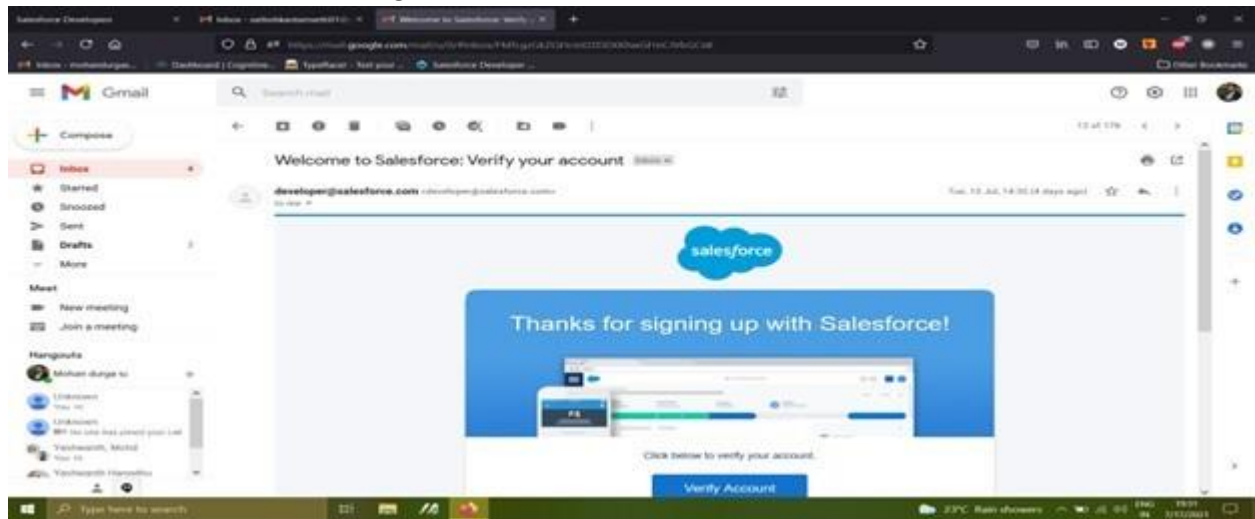
1. Go to [developers.salesforce.com/signup](https://developers.salesforce.com/signup).
2. Click on "Sign Up."
3. Fill out the Sign-Up Form with the following details:
  - 🔗 First Name & Last Name
  - 🔗 Email
  - 🔗 Role: Developer
  - 🔗 Company: [Your College Name]
  - 🔗 Country: India
  - 🔗 Postal Code: [Your Pin Code]
  - 🔗 Username: Create a username using a combination of your name and company.  
This does not need to be a valid email; you can format it as username@organization.com.  
Click on "Sign Up" after filling in all the details



## Step 2: Account Activation

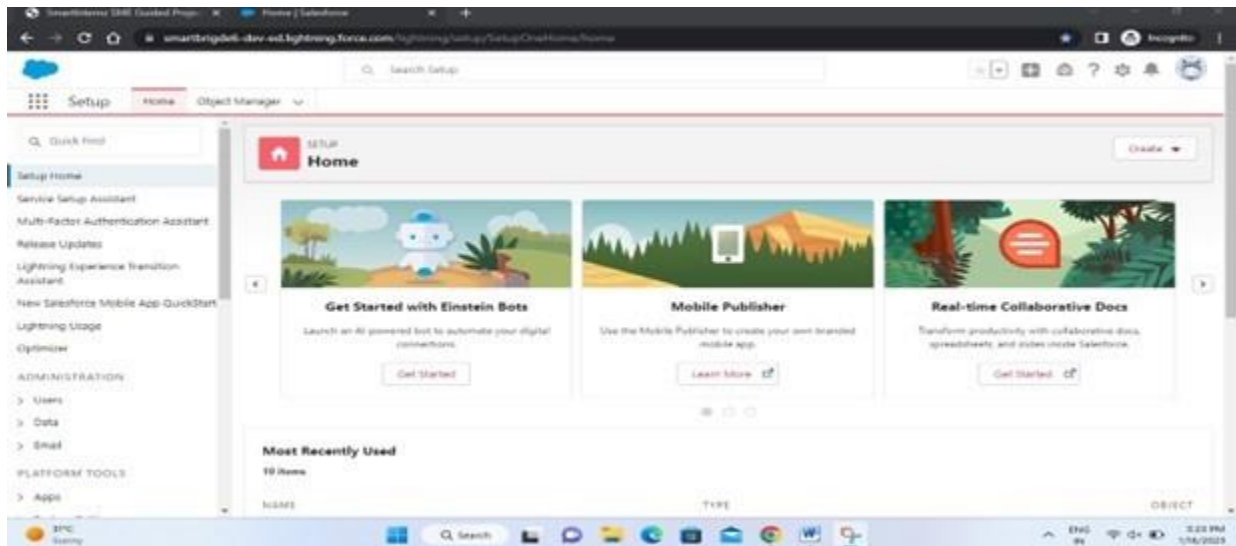
1. Go to your email inbox that you used for signing up.
2. Find the verification email from Salesforce and click on the "Verify Account link to activate your account.

📧 Note: The email might take 5-10 minutes to arrive.



### Step 3: Login to Your Salesforce Account

1. Go to [login.salesforce.com](https://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.Salesforce Objects

Salesforce objects are database tables that allow you to store data specific to an organization. Objects in Salesforce are of two types:

1. **Standard Objects:** These are the pre-built objects provided by Salesforce, such as Users, Contracts, Reports, Dashboards, and more. Standard objects form the foundation of Salesforce's data structure and cover common business scenarios.
2. **Custom Objects:** These are user-defined objects created to store data that is unique to your organization's needs. In the context of the Urban Color Management System, examples of custom objects include **Our Customers, Consultants, Retailers, and Others.**

### 2.1.Creating Objects for Urban Color Management

In the Urban Color Management System, we need to create three custom objects: **Our Customers, Consultants, Retailers, and Others.** The following steps will guide you through the process of creating these objects in Salesforce.

#### Step 1: Access Setup

1. Click on the gear icon in the upper-right corner of Salesforce.
2. Select "**Setup**" from the dropdown menu.

#### Step 2: Open Object Manager

1. Click on the "**Object Manager**" tab located next to the Home tab.

#### Step 3: Create a Custom Object

1. On the Object Manager page, look to the right side of the screen.
2. Click on the "**Create**" dropdown and select Custom Object.

#### Step 4: Create "Our Customer" Object

1. On the **Custom Object Definition page**, enter the following details:
  - 🔍 **Label:** Our Customer
  - 🔍 **Plural Label:** Our Customers
  - 🔍 **Record Name:** Our Customer
2. Check the following boxes:

☐ **Allow Reports**

☐ **Allow Search**

3. Click "**Save**" to create the object.

## Step 5: Create a Custom Tab for "Our Customer"

1. Click the "**Home**" tab and enter "**Tabs**" in the Quick Find search bar.
2. Select "**Tabs**" from the search results.
3. Under Custom Object Tabs, click New.
4. For Object, select Our Customer.
5. For Tab Style, select any icon that represents your object.
6. Leave all other settings as defaults and click Next.
7. Click "**Next**" again, then Save.

## 2.2.Creating the Consultants Object

The following steps will guide you through the process of creating the **Consultants** object in Salesforce.

### Step 1: Access Setup

1. Click on the gear icon in the upper-right corner of Salesforce.
2. Select "**Setup**" from the dropdown menu.

### Step 2: Open Object Manager

1. Click on the "**Object Manager**" tab located next to the Home tab.

### Step 3: Create a Custom Object

1. On the **Object Manager** page, look to the right side of the screen.
2. Click on the "**Create**" dropdown and select Custom Object. **Step 4:**

### Create "Consultants" Object

1. On the **Custom Object Definition** page, enter the following details:  
☐ **Label:** Consultant

- ☐ **Plural Label:** Consultants
- ☐ **Record Name:** Consultant
- 2. Check the following boxes:
  - ☐ **Allow Reports**
  - ☐ **Allow Search**
- 3. Click "**Save**" to create the object.

## Step 5: Create a Custom Tab for "Consultants"

1. Click the "**Home**" tab and enter "**Tabs**" in the Quick Find search bar.
2. Select "**Tabs**" from the search results.
3. Under **Custom Object** Tabs, click New.
4. For Object, select Consultants.
5. For Tab Style, select any icon that represents your object.
6. Leave all other settings as defaults and click Next.
7. Click "**Next**" again, then Save.

## 2.3.Creating the Retailers Object

The following steps will guide you through the process of creating the Retailers object in Salesforce.

### Step 1: Access Setup

1. Click on the **gear icon** in the upper-right corner of Salesforce.
2. Select "**Setup**" from the dropdown menu.

### Step 2: Open Object Manager

1. Click on the "**Object Manager**" tab located next to the Home tab.

### Step 3: Create a Custom Object

1. On the **Object Manager** page, look to the right side of the screen.
2. Click on the "**Create**" dropdown and select Custom Object.



## Step 4: Create "Retailers" Object

1. On the Custom Object Definition page, enter the following details:

☐ **Label:** Retailer

☐ **Plural Label:** Retailers

☐ **Record Name:** Retailer

2. Check the following boxes:

☐ **Allow Reports**

☐ **Allow Search**

3. Click **"Save"** to create the object.

## Step 5: Create a Custom Tab for "Retailers"

1. Click the **"Home"** tab and enter **"Tabs"** in the Quick Find search bar.
2. Select **"Tabs"** from the search results.
3. Under Custom Object Tabs, click New.
4. For Object, select Retailers.
5. For Tab Style, select any icon that represents your object.
6. Leave all other settings as defaults and click Next.
7. Click **"Next"** again, then Save.

## 2.4.Creating the Others Object

The following steps will guide you through the process of creating the Others object in Salesforce.

### Step 1: Access Setup

1. Click on the **gear icon** in the upper-right corner of Salesforce.
2. Select **"Setup"** from the dropdown menu.

### Step 2: Open Object Manager

1. Click on the **"Object Manager"** tab located next to the Home tab.

### Step 3: Create a Custom Object

1. On the Object Manager page, look to the right side of the screen.
2. Click on the **"Create"** dropdown and select Custom Object.

### Step 4: Create "Others" Object

1. On the **Custom Object Definition** page, enter the following details:
  - ☐ **Label:** Other
  - ☐ **Plural Label:** Others
  - ☐ **Record Name:** Other
2. Check the following boxes:
  - ☐ **Allow Reports**
  - ☐ **Allow Search**
3. Click **"Save"** to create the object.

### Step 5: Create a Custom Tab for "Others"

1. Click the **"Home"** tab and enter **"Tabs"** in the Quick Find search bar.
2. Select **"Tabs"** from the search results.
3. Under Custom Object Tabs, click New.
4. For Object, select Others.
5. For Tab Style, select any icon that represents your object.
6. Leave all other settings as defaults and click Next.
7. Click **"Next"** again, then Save.

### 3. Fields and Relationships

In Salesforce, an object relationship is a two-way association between two objects, allowing users to connect and interact with related data across different objects. This relationship is established by creating custom relationship fields on an object. These relationship fields enable users to view records and seamlessly access related information, providing a comprehensive view of data across the Salesforce environment.

By using relationships, Salesforce ensures that all related data is interconnected, making it easier for users to navigate between related records, improving data consistency, and enhancing the overall user experience.

#### 3.1.Fields in the "Our Customers" Object

The following fields are defined in the "Our Customers" object, each with a specific data type:

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

#### 3.2.Fields in Consultants objects

The following fields are defined in the "**Consultants**" object, each with a specific data type:

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

### 3.3.Fields in Retailers objects

The following fields are defined in the "**Retailers**" object, each with a specific data type:

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)

### 3.4.Fields in Others objects

The following fields are defined in the "Others" object, each with a specific data type:

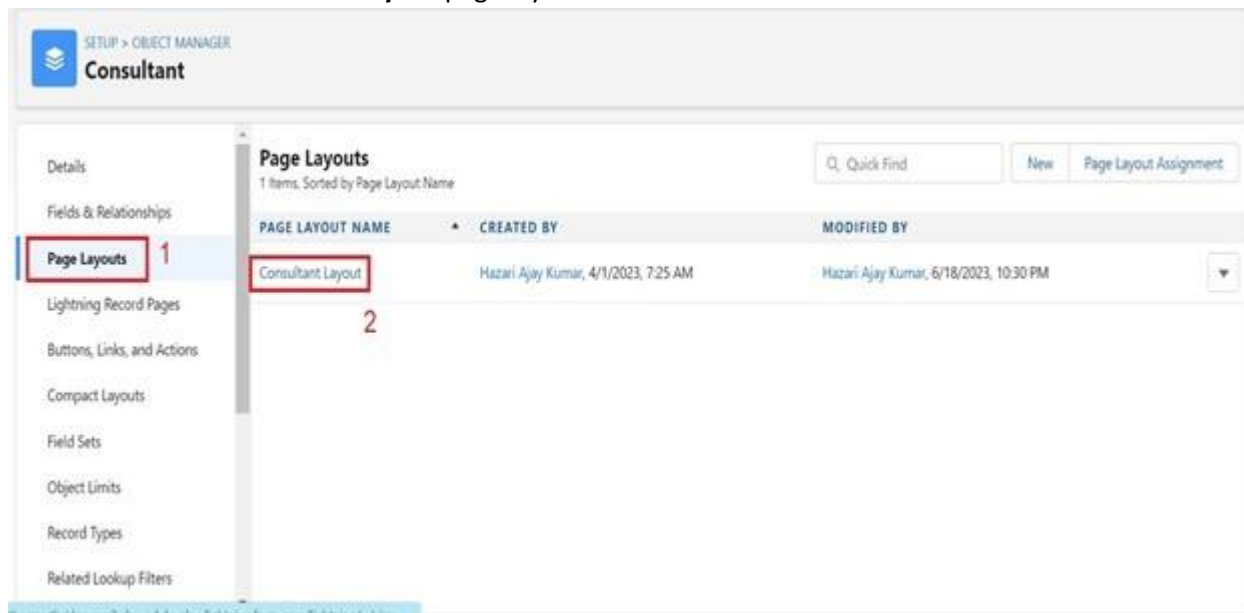
S No	Field Label	Data Type
1	Name	Text
2	Employee 1)Company Employee 2)Staff 3)Special Reference	Picklist
3	Coupon	Text
4	Products 1)Lipstick 2)Compact 3)EyeLiner 4)FacePack 5)Lip Balm 6)Nail Polish	Multi-Picklist

## 4. Page Layouts

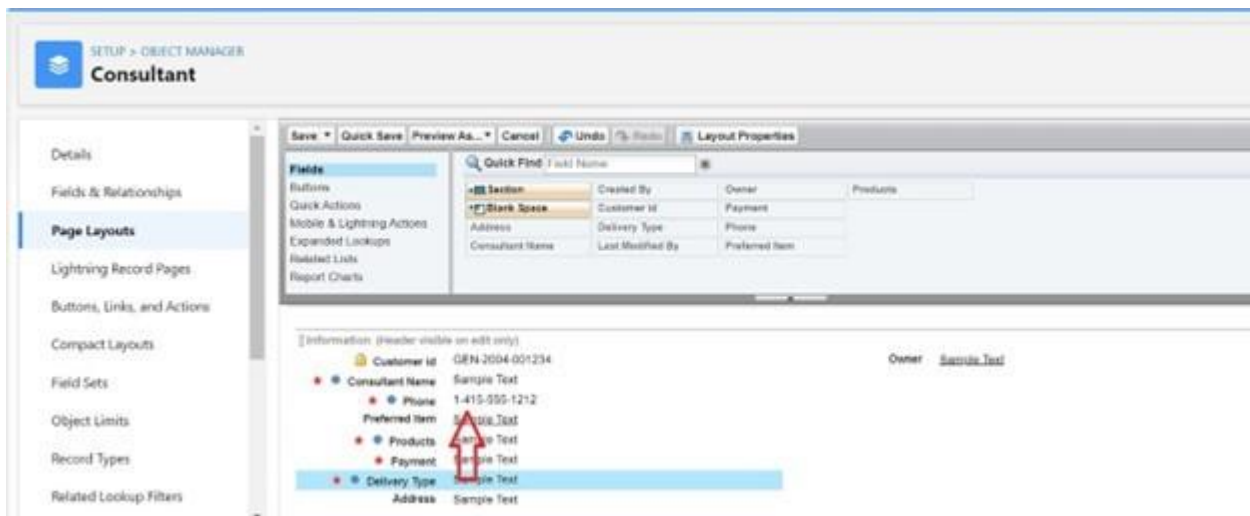
In Salesforce, page layouts define the organization and arrangement of fields, buttons, related lists, and other components on an object's detail and edit pages. They allow you to control the user interface and tailor it to meet the specific needs of your organization.

### Page Layout Creation

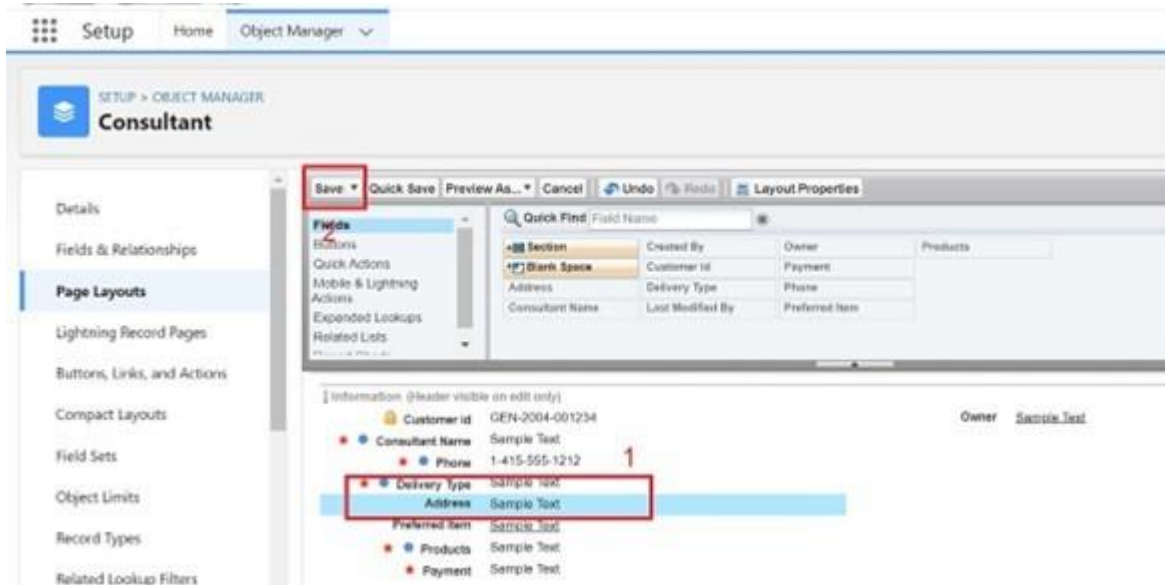
1. From the Salesforce setup menu, go to **"Object Manager"** and select the Consultants object.
2. Click on **"Page Layouts"** in the left sidebar. This will display a list of available page layouts for the selected object.
3. Select the **Consultant Layout** page layout



4. Click and drag the Delivery Type and Address fields below the Phone field.



5. Click on Save.



## 5.The Lightning App

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

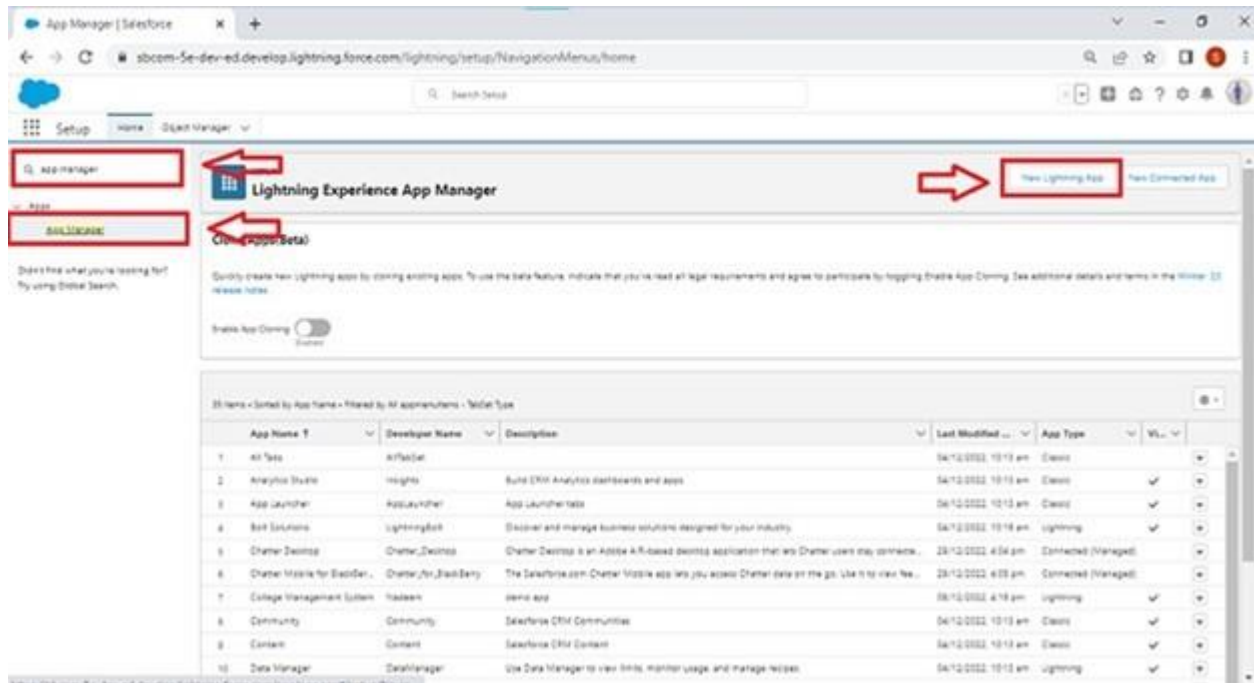
Lightning apps let you brand your apps with a custom Color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your org can work more efficiently by easily switching between apps.

### 5.1.Create a Lightning App

To create a Lightning app page:

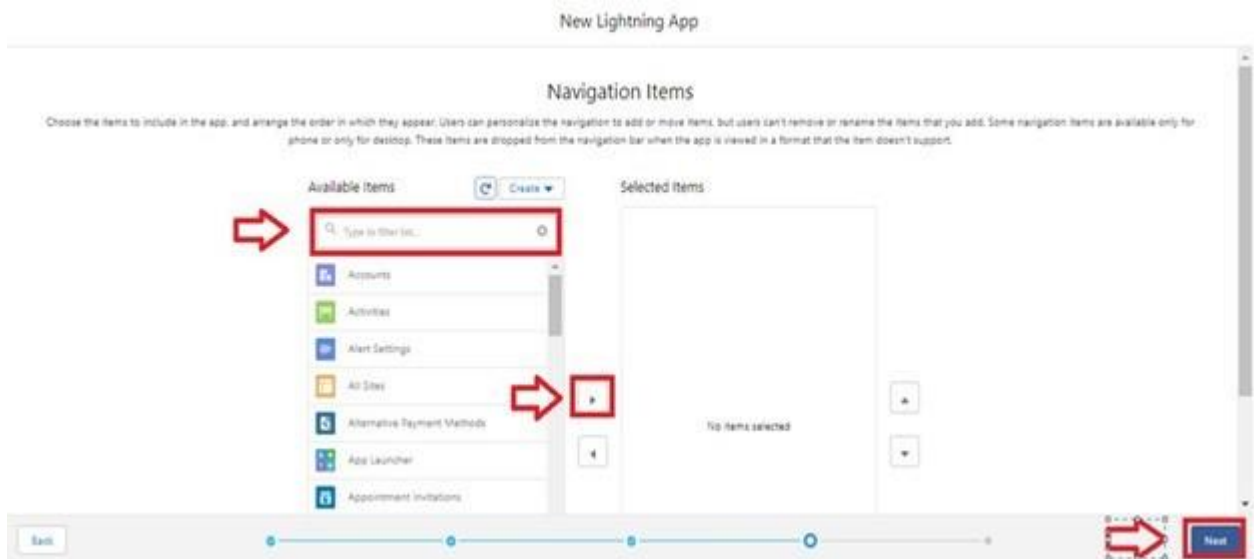
1. Go to the **Setup** page.
2. In the Quick Find search bar, type “**App Manager**” and select “**App Manager.**”
3. Click on **New Lightning App.**
  - 🔗 Fill the app name as Urban Color in App Details and Branding.
  - 🔗 Click Next.
  - 🔗 On the App Options page, keep the settings as default.
  - 🔗 Click Next.
  - 🔗 On the Utility Items page, keep the settings as default. 🔗 Click Next.





### To Add Navigation Items:

1. Select the items (**Our Customers, Consultants, Retailers, Others, Reports, Dashboards**) from the search bar and move them using the arrow button.
2. Click Next.



### To Add User Profiles:

1. Search for profiles (**System Administrator**) in the search bar.
2. Click on the arrow button to add the profile.
3. Click Save & Finish.

## New Lightning App

### User Profiles

Choose the user profiles that can access this app.

#### Available Profiles

- Analytics Cloud Integration User
- Analytics Cloud Security User
- Authenticated Website
- Authenticated Website
- Contract Manager
- Cross Org Data Proxy User
- Custom Sales Profile

#### Selected Profiles

No Profiles selected

Back

Save & Finish

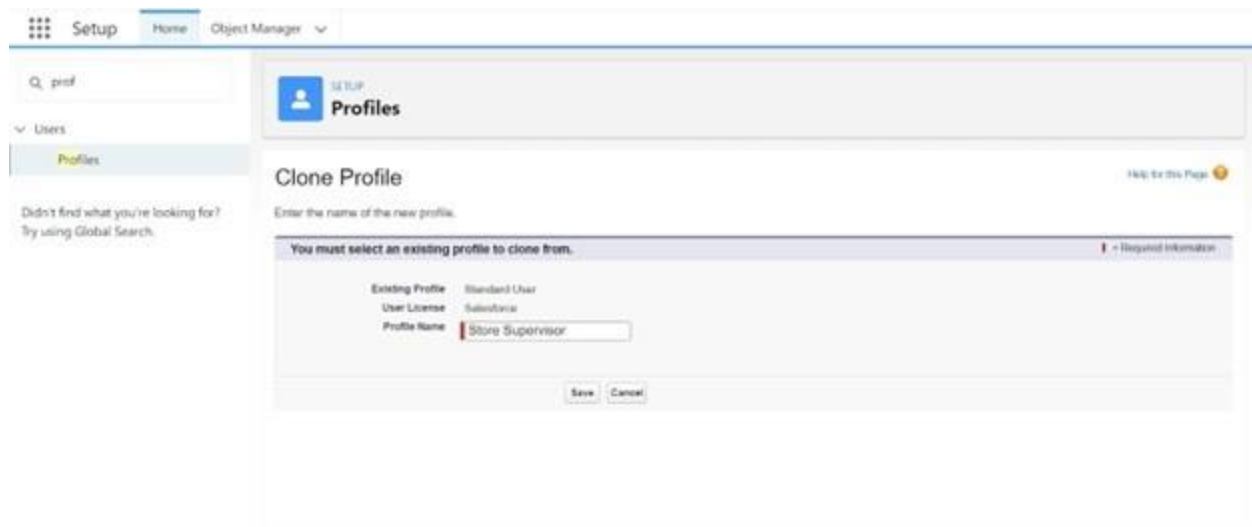
## 6.Profile

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.

### 6.1.Creating a Profile

#### Creating a Store Supervisor Profile and Setting Object Permissions:

1. From Setup, enter Profiles in the Quick Find box, and select Profiles.
2. From the list of profiles, find Standard User.
3. Click Clone.
4. For Profile Name, enter Store Supervisor.
5. Click Save.



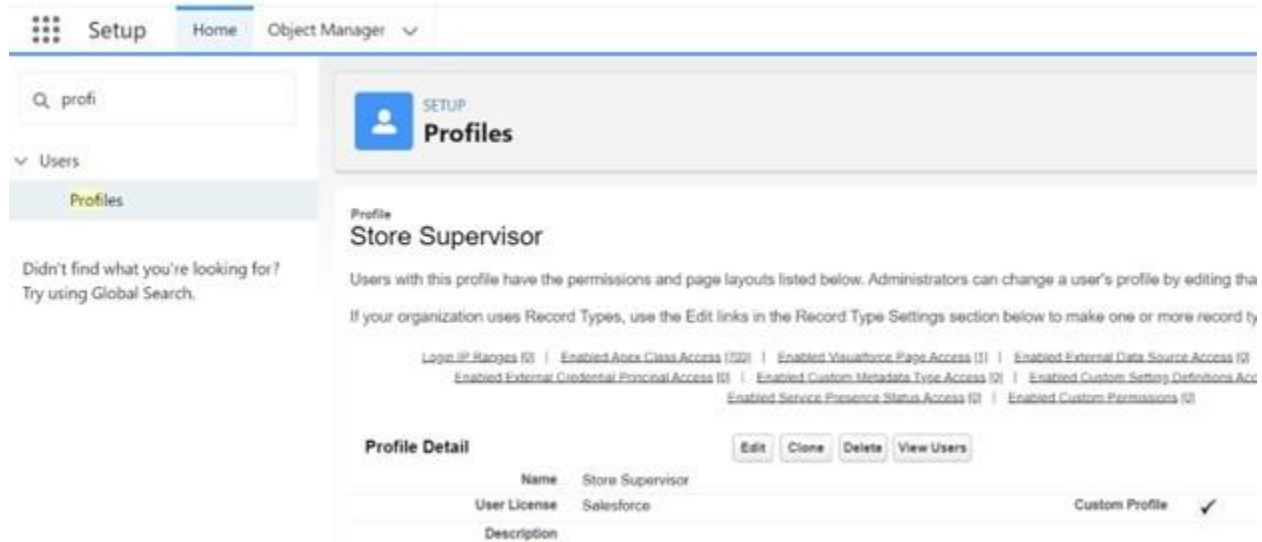
The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with 'prof' entered, and a list of items including 'Users' and 'Profiles'. The main content area is titled 'Clone Profile' and includes a message: 'You must select an existing profile to clone from.' Below this message is a table with the following data:

Existing Profile	User License	Profile Name
Standard User	Salesforce	Store Supervisor

At the bottom of the table are 'Save' and 'Cancel' buttons. The 'Profile Name' field is highlighted in red, indicating a required field.

6.While still on the **Store Supervisor** profile page, click **Edit**.

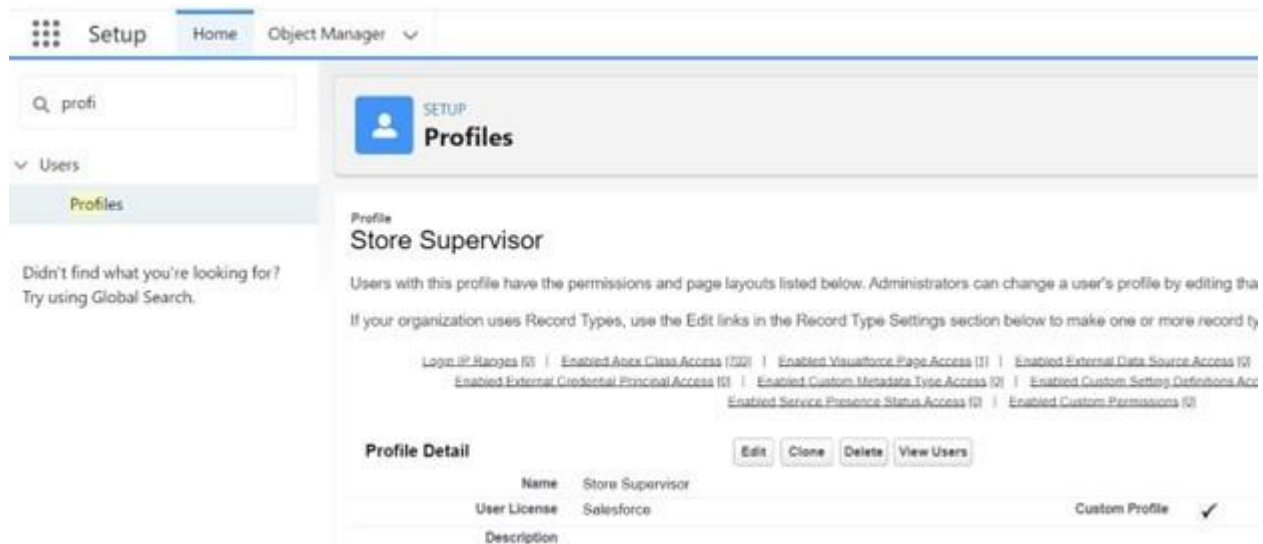
7.Scroll down to **Custom Object Permissions** and give access for **Create, Read, Edit, Delete, View All, and Modify All** for the **Our Customers, Consultants, Retailers, Others** objects.



8.Scroll down to Custom App Settings and give access to Urban Color. 9. Click on Save.

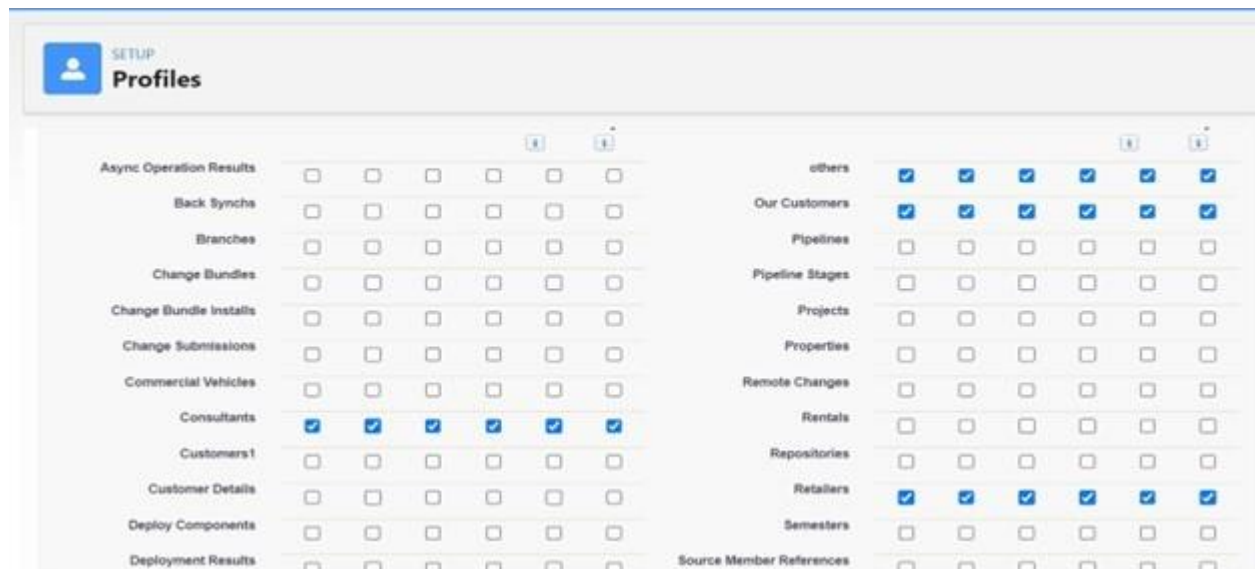
#### To Create a New Profile:

1. Go to Setup.
2. Type Profiles in the Quick Find box.
3. Click on Profiles.
4. Clone the desired profile (Standard User is preferable).
5. Enter the Profile Name.
6. Click Save.
- 7.While still on the profile page, click Edit.




8.Scroll down to the **Custom Object Permissions** and give all access to the **Consultants, Others, Our Customers, Retailers** objects.

9.Click on **Save**.



Similarly, Create an Operator Profile:

1. Clone the **Salesforce Platform** user profile.
- 2.Give access only for **Billing Operator**.

 **SETUP**  
**Profiles**

Profile Edit

Billing Operator

Help for this Page

Set the permissions and page layouts for this profile.

Profile Edit

SaveSave & NewCancel

Name

Billing Operator


User License

Salesforce


Custom Profile

☒

Description

 **SETUP**  
**Profiles**

ALLOW ADMIN for employees

☐ 

Password Policies

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

☐ 

SaveSave & NewCancel

3.Click on Save.

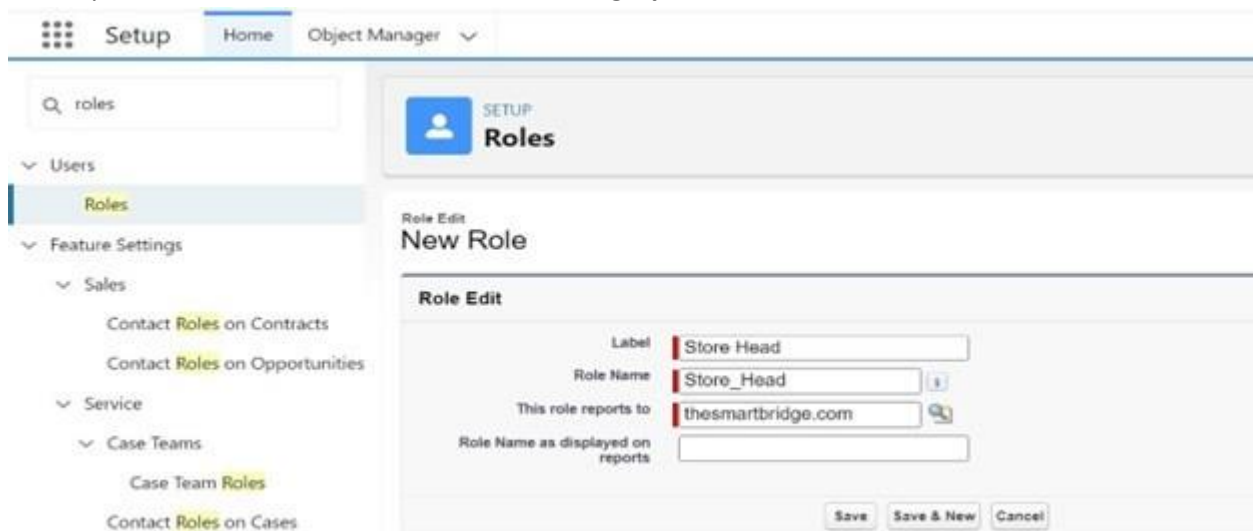
## 7.Setup Roles

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

### Setup Roles

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

Similarly, create one role under Store Head 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 fields are as follows:

Role Edit	
Label	<input type="text" value="Store Head"/>
Role Name	<input type="text" value="Store_Head"/>
This role reports to	<input type="text" value="thesmartbridge.com"/>
Role Name as displayed on reports	<input type="text"/>

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





## 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 User:

1. From **Setup**, in the Quick Find box, enter **Users**, and then select **Users**.
2. Click **New User**.
3. Enter the user's name as Amar K and your email address, and create 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 as **Store Head**.
5. Select a User License as **Salesforce**.
6. Select a Profile as **Store Supervisor**.
7. Check Generate new password and notify the user immediately to have the user's login name and a temporary password emailed to your email.
8. Fill in the fields (**First Name, Last Name, Alias, Email ID, Username, Nickname, Role, User License, Profile**).
9. Click **Save**.

The screenshot shows the Salesforce Setup interface for creating a new user. The left sidebar contains a navigation menu with options like Permission Set Groups, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users. The main content area is titled 'Users' and contains a 'User Edit' form. The form has tabs for 'General Information', 'Advanced Information', and 'Related Information'. The 'General Information' tab is active, showing fields for First Name (Amar), Last Name (K), Alias (ak), Email (amark2133@gmail.com), Username (amark2133@salesforce.com), Nickname (User16716132313747430), Title (Store Supervisor), Company, Department, and Division. On the right side of the form, there are dropdown menus for Role (Store Head), User License (Salesforce), and Profile (Store Supervisor). Below these are checkboxes for Active (checked), Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, and VDC User. At the bottom right, there is a dropdown for Data.com User Type set to 'None'.

The screenshot shows the Salesforce Setup interface for user management. The left sidebar contains a search bar and a list of navigation items: Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Users (selected), Feature Settings, Data.com, Prospect Users, and Process Automation. The main content area is titled 'Users' and includes the following sections:

- Single Sign On Information:** Contains a 'Federation ID' text field.
- Locale Settings:** Contains three dropdown menus: 'Time Zone' (set to GMT-07:00 Pacific Daylight Time (America/Los Angeles)), 'Locale' (set to English (United States)), and 'Language' (set to English).
- Approver Settings:** Contains two text fields for 'Delegated Approver' and 'Manager', and a dropdown for 'Receive Approval Request Emails' (set to 'Only if I am an approver').

At the bottom of the main content area, there is a checkbox labeled 'Generate new password and notify user immediately' and three buttons: 'Save', 'Save & New', and 'Cancel'.

## 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 as John Teddy and your email address, and create 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 as **Billing Operator**.
5. Select a User License 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.
8. Fill in the fields (**First Name, Last Name, Alias, Email ID, Username, Nickname, Role, User License, Profile**).
9. Click **Save**.

Q

Search Setup

Q

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Custom

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

User Interface

Action Link Templates

Actions & Recommendations

App Menus

Custom Labels

Density Settings

Global Actions

SETUP

Users

User Edit

Save

Save & New

Cancel

General Information

First Name

John

Last Name

Trudy

Alias

John

Email

johntrudy@gmail.com

Username

johntrudy@salesforce.com

Nickname

User167160299807441835

Title

Vehicle Manager

Company

Department

Division

Role

Siding Operator

User Location

Salesforce Platform

Profile

Siding Operator

Active

☒

Marketing User

☐

Utility User

☐

Knowledge User

☐

Flow User

☐

Service Cloud User

☐

Site.com Contributor User

☐

Site.com Publisher User

☐

WEC User

☐

Data.com User Type

Admin

Data.com Marketing Automation Lead

☐

Accessibility Mode (Classic Design)

☐

High Contrast Palette on Charts

☐

Load Lightning Pages While Browsing

☒

Debug Mode

☐

Make Setup My Default Landing Page

☐

Setup

Home

Object Manager

Q

user

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

Setup

Home

Object Manager

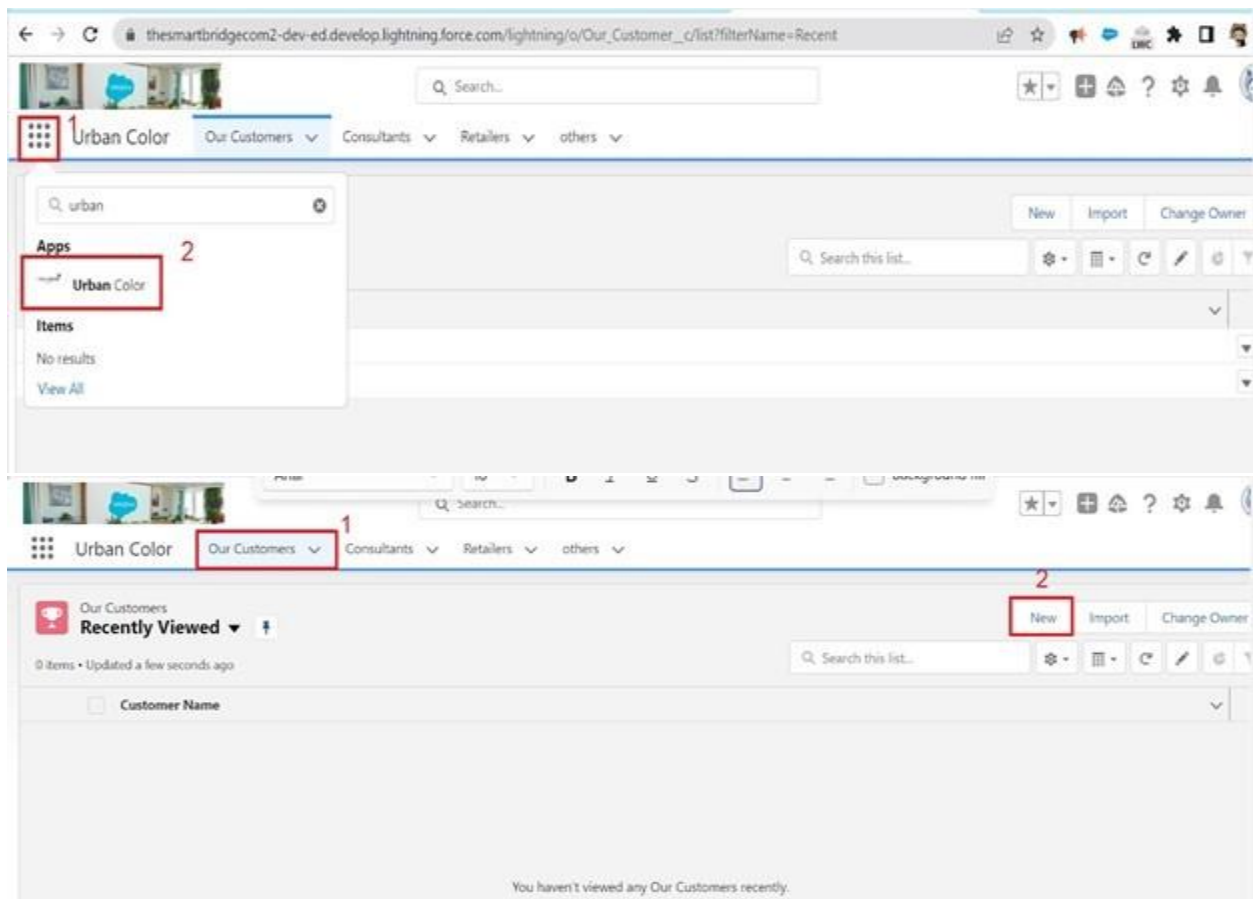
## 9.User Adoption

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

To ensure effective user adoption and navigation, it's important to educate users on how to interact with the Salesforce database and manage records. The following steps outline key areas to focus on:

### Create Our Customer Record

1. Click on the **App Launcher** on the left side of the screen.
2. Search for **Urban Color** and click on it.
3. Click on the **Our Customer** tab.
4. Click the **New button**.
5. Fill in all the **Our Customer record details**.
6. Click on the **Save button**.



## View Record (Our Customer)

1. Click on the **App Launcher** on the left side of the screen.
2. Search for **Urban Color** and click on it.
3. Click on the **Our Customer** tab.
4. Click on any record name to view the details of the **Our Customer**.

Information

1

\*Customer Name

Complete this field.

Customer id

\*Phone

Email id

Owner

Hazari Ajay Kumar

Cancel

Save & New

Save

2

Urban Color

Our Customers

Consultants

Retailers

others

Our Customers

Recently Viewed

2 items • Updated a few seconds ago

Search this list...

Customer Name

1

Suresh

2

2

Kamal

Our Customer

Suresh

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

## Delete Record (Our Customer)

1. Click on the **App Launcher** on the left side of the screen.
2. Search for **Urban Color** and click on it.
3. Click on the **Our Customer** tab.
4. Click on the Arrow on the right-hand side of the particular record.
5. Click Delete, and then confirm by clicking Delete again.

The image shows two screenshots of the Urban Color app interface. The top screenshot shows the 'Our Customers' tab with a list of customers. A red box labeled '1' highlights the 'Our Customers' tab. A red box labeled '2' highlights the dropdown arrow on the right side of the first record, 'Suresh'. A red box labeled '3' highlights the 'Delete' option in the dropdown menu. The bottom screenshot shows the same interface with a confirmation dialog box titled 'Delete Our Customer' overlaid. The dialog box contains the text 'Are you sure you want to delete this Our Customer?' and has 'Cancel' and 'Delete' buttons.

Urban Color

Our Customers

Recently Viewed

2 items • Updated 2 minutes ago

Customer Name

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

Urban Color

Our Customers

Recently Viewed

2 items • Updated 6 minutes ago

Customer Name

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

Delete Our Customer

Are you sure you want to delete this Our Customer?

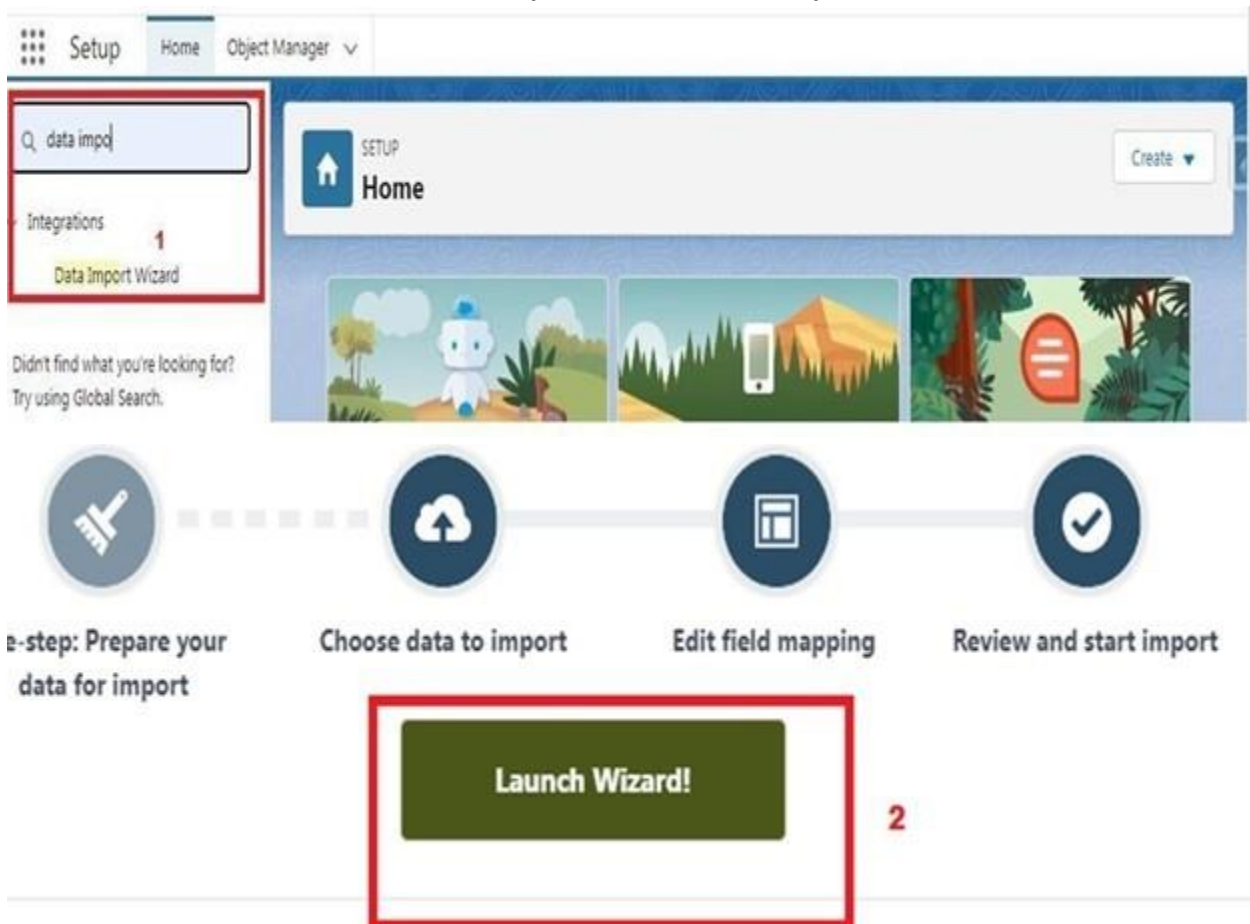
Cancel Delete

## 10. Import Data

**Data Import Wizard**—This tool, accessible through the **Setup** menu, allows you to import data into common standard objects such as **Contacts**, **Leads**, **Accounts**, as well as data into custom objects.

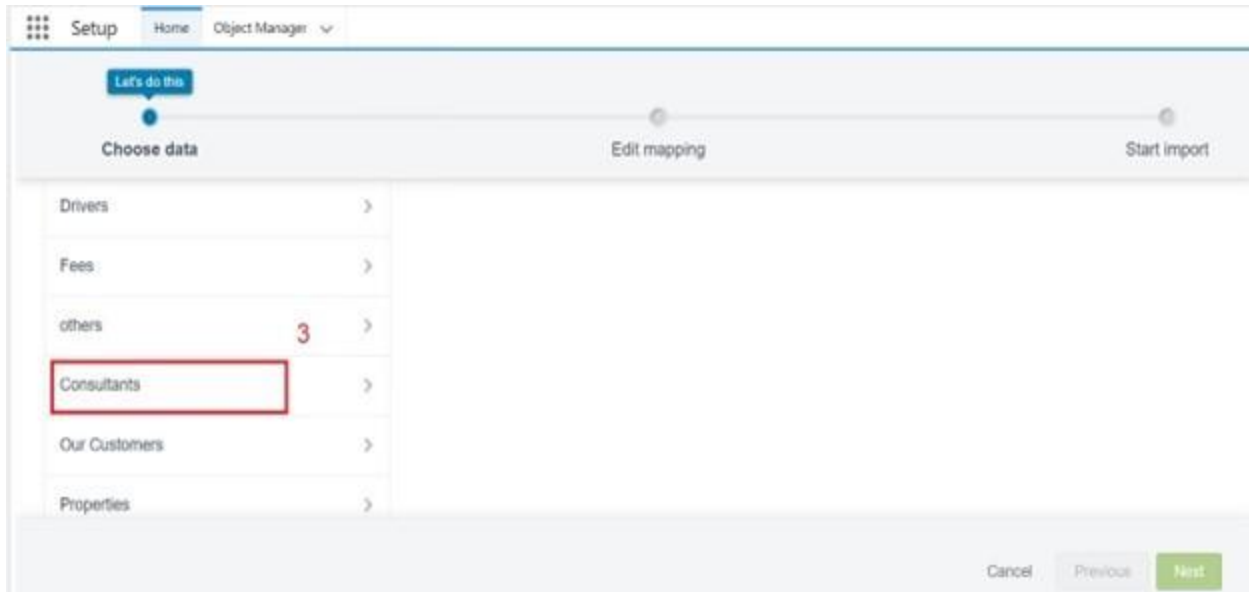
### To Import Data

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



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? <sup>?</sup>

Standard objects	Custom objects
Attendees	
Buyers	

What do you want to do? <sup>?</sup>

Add new records	
Update existing records	
Add new and update existing records	

Where is your data located? <sup>?</sup>

6. Click **CSV** and choose the file **Consultant\_CSV** which was created earlier. Click **Next**.

Choose data      Edit mapping      Start import

What kind of data are you importing? <sup>?</sup>      What do you want to do? <sup>?</sup>      Where is your data located? <sup>?</sup>

Standard objects    Custom objects

Attendees >

Buyers >

Customers >

Departments ✓

Add new records ✓

Match by: <sup>?</sup>  
--None--

Which User field in your file designates record owners? <sup>?</sup>  
--None--

Trigger workflow rules and processes? <sup>?</sup>  
☐ 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 (Mapped Salesforce Object), the fields are automatically mapped. Click **Next**.

Setup   Home   Object Manager >

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	Don Hig	Ajth	Status
Change	Mobile Number	Mobile Number	994036732	79403673	99230429
Change	Delivery Type	Delivery Type	Self Pickup	Cooler	Self Pickup
Change	Address	Address		Hybridized	
Change	Products	Products	1 unit/4	Compact	Face Pack
Change	Payment	Payment	Cash	101	Credit Card
Change	Email	Email		ajth@gmail.com	Status14@gmail.com

Cancel    Previous    **Next**

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

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:

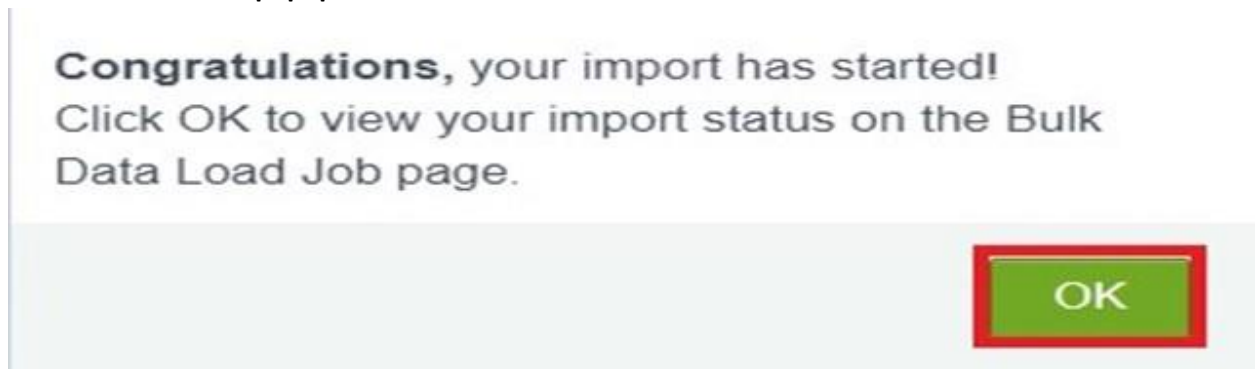
Mapped fields: 7

Your import will not include:

Unmapped fields: 0

Cancel Previous **Start Import**

9. Click OK on the **popup**.



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
<a href="#">View Request</a>	<a href="#">View Result</a>	7512w00000Xqar	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:** Perform **Field Mapping** carefully.

Here is the formatted text for your document:

## 11.What are Reports?

### Reports

Reports in Salesforce are lists of records that meet specific criteria, providing answers to particular questions. These records are displayed in a table format that can be filtered or grouped based on any field.

**There are 4 types of report formats in Salesforce:**

**1. Tabular Reports:**

- ☐ The most basic report format, displaying rows of records in a table with a grand total.
- ☐ Easy to set up but cannot be used to create groups of data or charts and cannot be used in Dashboards.
- ☐ Primarily used to generate simple lists or lists with a grand total.

**2. Summary Reports:**

- ☐ The most commonly used report format, allowing the grouping of rows of data, viewing subtotals, and creating charts.

**3. Matrix Reports:**

- ☐ The most complex report format, summarizing information in a grid format.
- ☐ Allows records to be grouped by both columns and rows.
- ☐ Can be used to generate dashboards and add charts.

**4. Joined Reports:**

- ☐ Allows the creation of different views of data from multiple report types.
- ☐ Data in joined reports is organized in blocks, each acting as a subreport with its own fields, columns, sorting, and filtering.
- ☐ Used to group and show data from multiple report types in different views.

### Report Types:

A **Report Type** determines which set of records will be available in a report. Each report is based on a particular report type, selected first when creating a report. Every report type has a primary object and one or more related objects, all of which must be linked together directly or indirectly.

1. A report type cannot include more than 4 objects.
2. Once a report is created, its report type cannot be changed.

**There are 2 types of report types:**

**1. Standard Report Types:**

- ☐ Automatically included with standard objects and custom objects where "Allow Reports" is checked.
- ☐ Cannot be customized and automatically include standard and custom fields for each object within the report type.
- ☐ Created when an object or a relationship is created.
- ☐ Note: Standard report types always have inner joins.

## **2. Custom Report Types:**

- ☐ Created by an administrator or user with "Manage Custom Report Types" permission when standard report types cannot specify which records will be available in reports.
- ☐ Allows specification of objects that will be available in a particular report.
- ☐ The primary object must have a relationship with other objects present in the report type, either directly or indirectly.

**There are 3 types of access levels for folders:**

### **1. Viewer:**

- ☐ Users can see the data in a report but cannot make any changes except cloning it into a new report.

### **2. Editor:**

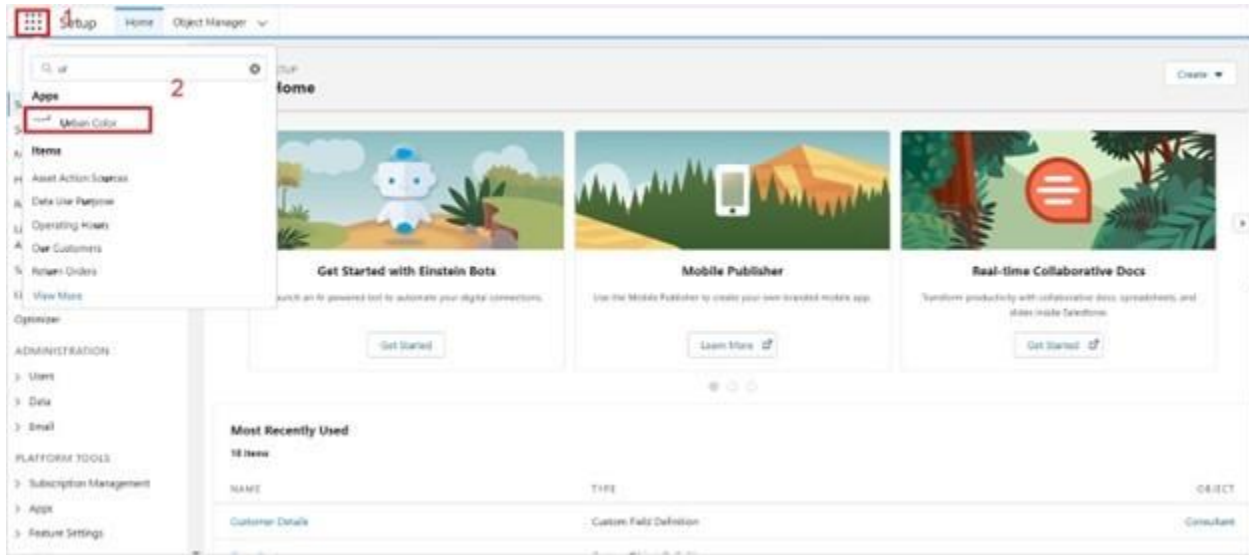
- ☐ Users can view and modify the reports and move them to/from any other folders they have access to as Editor or Manager.

### **3. Manager:**

- ☐ Users can do everything Viewers and Editors can do, plus control other users' access levels to the folder.
- ☐ Managers can also delete the report.

## **11.1.Create Report**

1. Click **App Launcher**.
2. Select **Urban Color App**.
3. Click the **Reports tab**.

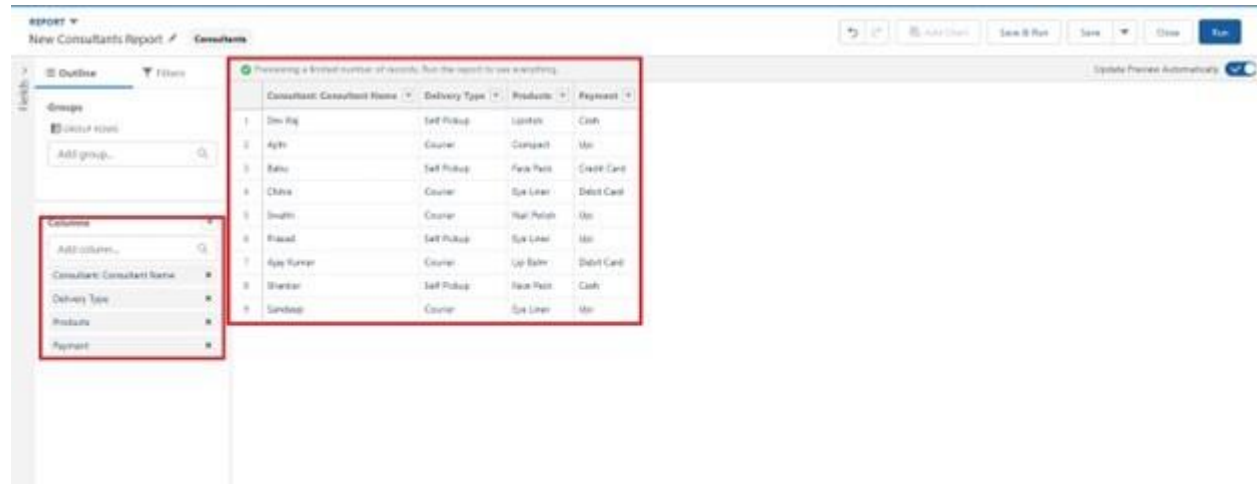


4. Click **New Report**.



5. Select the report type as **Consultants** and click **Start Report**.

6. Customize your report by selecting the following columns: **Consultant Name**, **Delivery Type**, **Products**, **Payment**.



7. Click the drop-down option on the **Payment** column and select **Bucket This Column**.

REPORT ▼  
New Consultants Report / Consultants

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

Fields

Outline Filters

Groups

GROUP ROWS

Add group...

Columns

Add column...

Consultant Consultant Name X

Delivery Type X

Products X

Payment X

Consultant	Consultant Name	Delivery Type	Products	Payment
1	Dev Raj	Self Pickup	Laptop	Cash
2	Ajith	Courier	Computer	UPI
3	Balu	Self Pickup	Face Pack	Credit Card
4	Chitra	Courier	Eye liner	Debit Card
5	Swathi	Courier	Hair Product	UPI
6	Prasad	Self Pickup	Eye liner	UPI
7	Ajith Kumar	Courier	Up Balm	Debit Card
8	Shraddha	Self Pickup	Face Pack	Cash
9	Sandeep	Courier	Eye liner	UPI

1

2

Sort Ascending

Sort Descending

Group Rows by this field

Group Columns by this field

Bucket This Column

Show Unique Count

Move Left

Move Right

Remove Column

8. Name the bucket **Payment Type**.

### Edit Bucket Column

\* Field

Payment X

\* Bucket Name

Payment type

All Values (4)

Unbucketed Values (4)

Search Values

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

Add Bucket

Move To

Cancel

Apply

9. Click **Add Bucket** and name it **NetBanking**.

10. Click **Add Bucket** and name it **Cash**.

### Edit Bucket Column

\* Field

Payment ×

\* Bucket Name

Payment type

All Values (4)

Bucket Name 2

Unbucketed Values (4)

☐ Bucket remaining values as Other

Add Bucket 1

Search Values

☐ VALUE BUCKET

☐ Credit Card

☐ Debit Card

☐ Upi

☐ Cash

Move To

Cancel

Apply

11. Click on All Values, select **Credit Card**, **Debit Card**, **UPI**, and move them to **NetBanking**.

### 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

☐ Credit Card

☐ Debit Card

☐ Upi

☐ 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

\* Field

Payment

\* Bucket Name

Payment type

All Values (4)

Net Banking (3)

Cash (1)

Unbucketed Values (0)

☐ Bucket remaining values as Other

Add Bucket

Search Values

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

Move To

Cancel

Apply

12. Click on All Values again, select **Cash**, and move it to **Cash**.

13. Click Apply.

14. In Group Rows, add the **Payment Type Bucket** field.

REPORT

New Consultants Report

Consultants

Outline

Filters

GROUP ROWS

Add group...

Payment type

GROUP COLUMNS

Add group...

Columns

Add column...

Consultant: Consultant Name

Delivery Type

Products

Payment

Payment type

Net Banking (7)

Subtotal

Cash (2)

Subtotal

Total (9)

Consultant: Consultant Name	Delivery Type	Products	Payment
Ayith	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
Sandeep	Courier	Eye Liner	Upi
Dev Raj	Self Pickup	Lipstick	Cash
Shankar	Self Pickup	Face Pack	Cash

15. Click Refresh.

16. Click Save and Run.

17. Give the report a name, e.g., **Consultant Report**.

**REPORT** ▾  
New Consultants Report / Consultants

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
	Snathi	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)				

18. Click **Save**.

Save Report

\* Report Name 1  
Consultants Report

Report Unique Name 2  
Consultants\_Report\_hyb

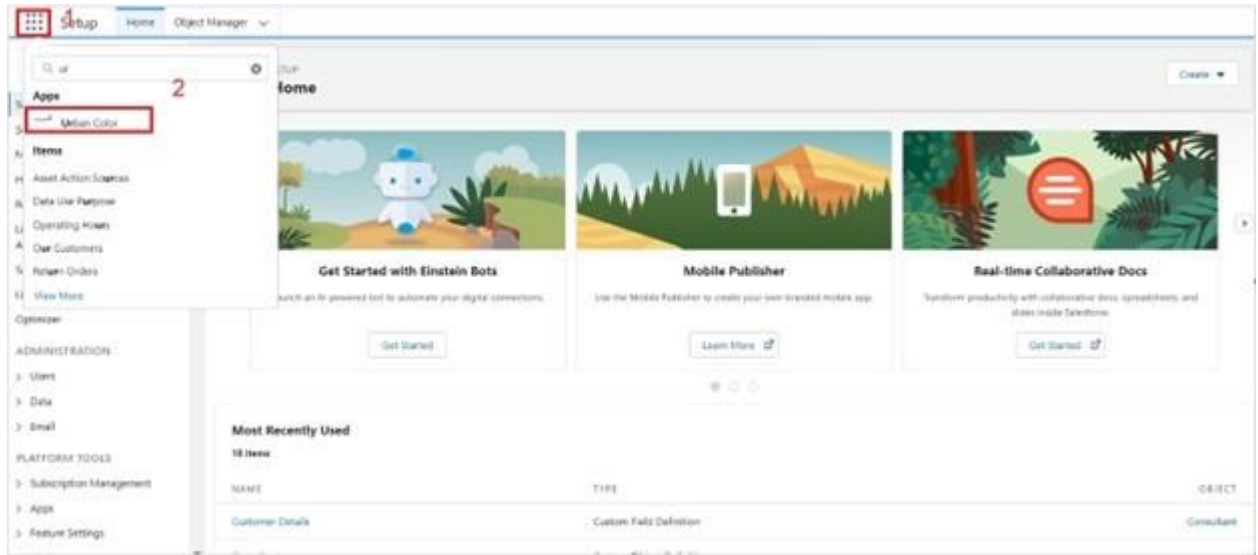
Report Description

Folder 3  
Private Reports

Cancel **Save**

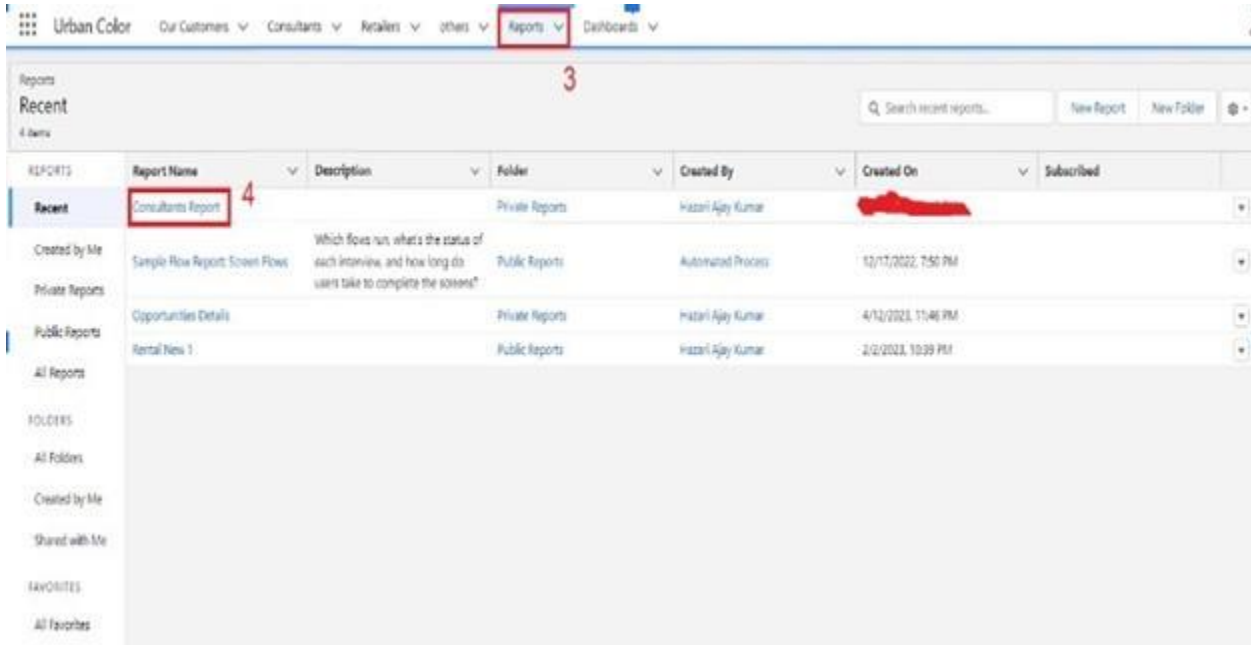
## 11.2.View Report

1. Click on the **App Launcher** on the left side of the screen.
2. Search for **Urban Color App** and click on it.



3. Click the **Reports** tab.

4. Click on the **Urban Color Report** to view the records.



## 12.Dashboards

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

### 12.1.Create Dashboard

Here's a step-by-step guide to creating a dashboard in the Urban Color application:

1. **Open the Urban Color Application:** Launch the application and navigate to the Dashboards tab.
2. **Create a New Dashboard:**
  - Click on the **"New Dashboard"** button.
3. **Name Your Dashboard:**
  - Enter **"Consultant Dashboard"** in the name field.
  - Click **"Create."**

New Dashboard

\* Name 3

Consultant Dashboard

Description

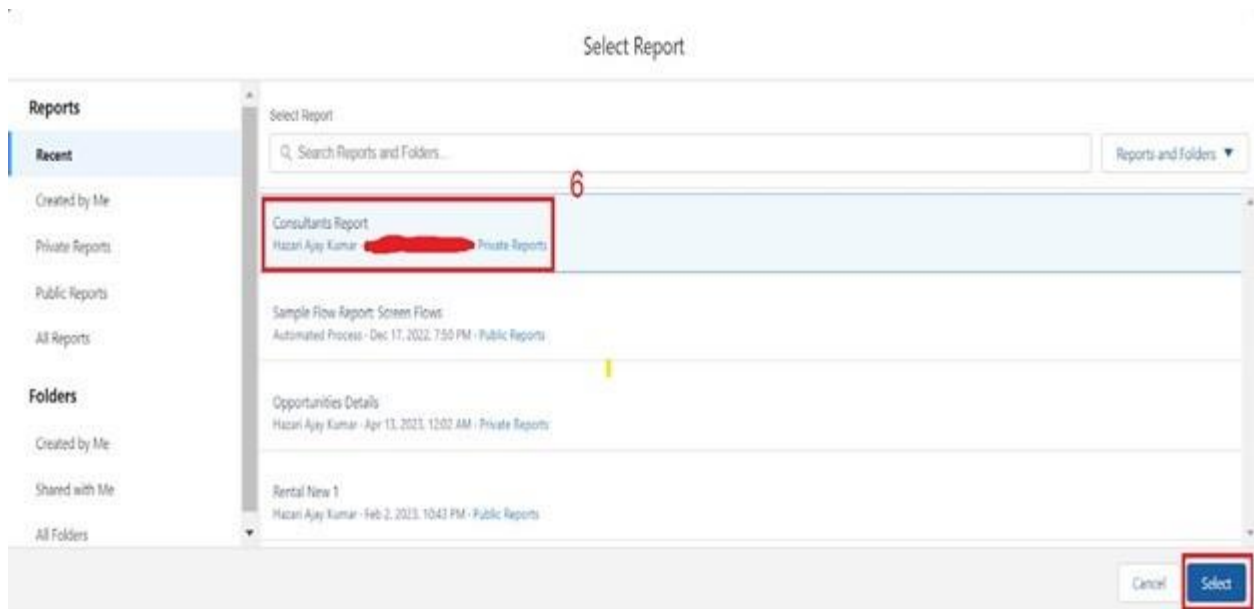
Folder

Private Dashboards Select Folder

4

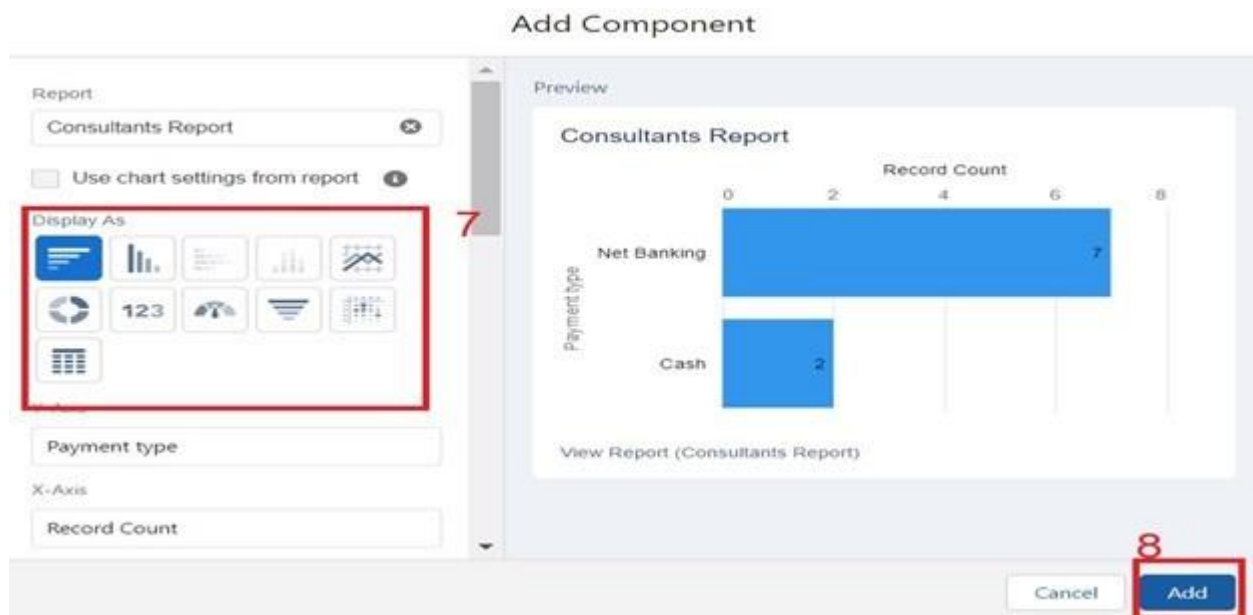
Cancel Create

5. **Add Components to the Dashboard:**
  - Click on **" + Component "** to add a new component.
  - Select the **"Consultants Report"** you created earlier.



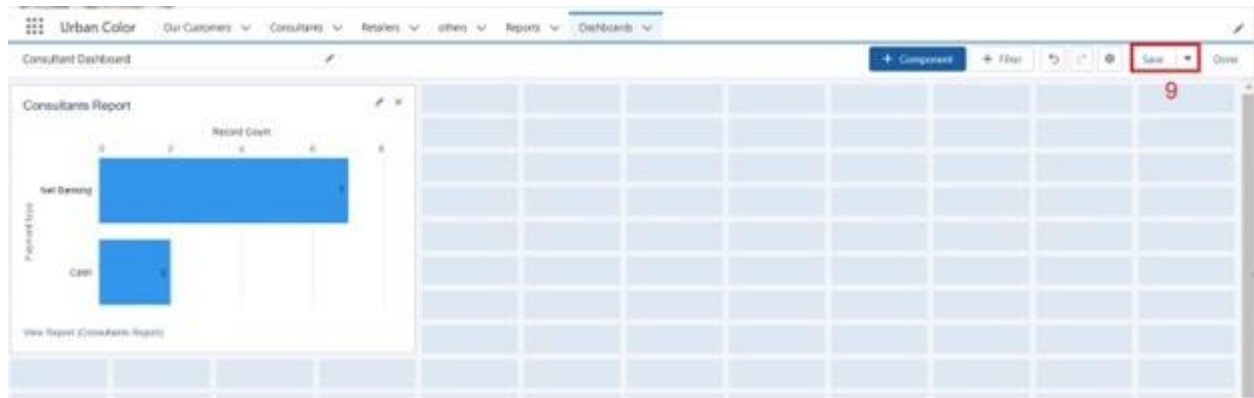
## 6. Choose Data Visualization:

❑ Pick a visualization type (e.g., chart, table) that best suits your data and needs. ❑  
Click "Add."



## 7. Save Your Dashboard:

❑ After configuring the components and visualizations, click "Save" to finalize your dashboard.



## 12.2.View Dashboard

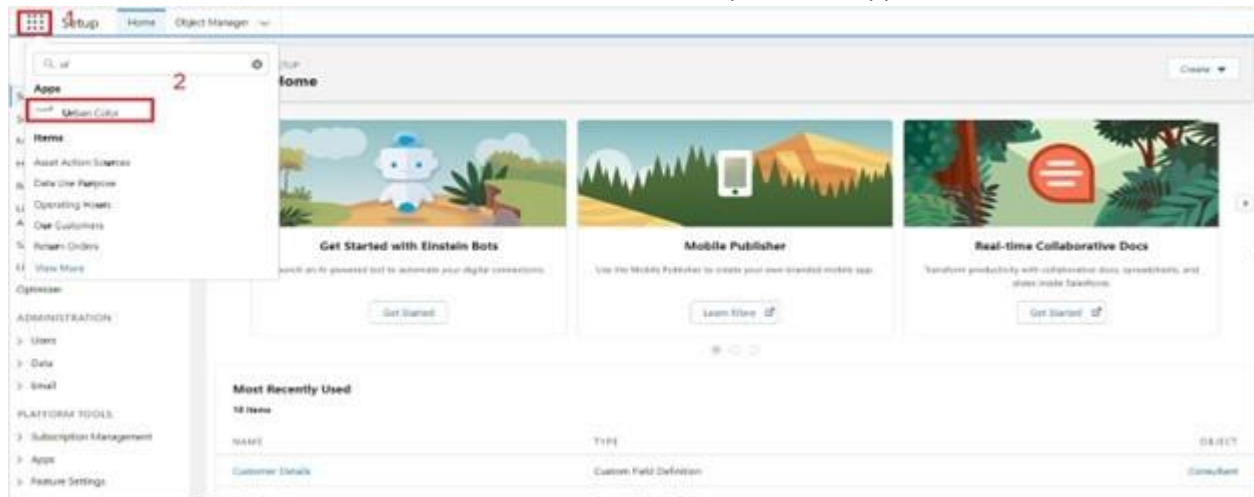
To view the dashboard, follow these steps:

### 1. Open the App Launcher:

- ☐ Click on the App Launcher icon on the left side of the screen.

### 2. Search for the Dashboard:

- ☐ Type "Candidate Internal Result Card" into the search bar.
- ☐ Click on the "Candidate Internal Result Card" option that appears.



### 3.Navigate to the Dashboard Tab:

- ☐ Once in the Candidate Internal Result Card view, click on the "Dashboard" tab.

### 4.View the Graph:

- ☐ Click on the "Candidate Internal Result Card" to see the graph view of the records.







