

Screenshots of Cosmetics Store Management

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Objects

1. Our Customer

The screenshot shows the Salesforce Setup interface for the 'Our Customer' object. The left sidebar contains a navigation menu with options: 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, and List View Button Layout. The main content area is titled 'Details' and includes a search bar and 'Edit' and 'Delete' buttons. The details are organized into two columns. The left column contains: Description, API Name (Our_Customer__c), Custom (checked), Singular Label (Our Customer), and Plural Label (Our Customers). The right column contains: Enable Reports (checked), Track Activities, Track Field History, Deployment Status (Deployed), Help Settings, and a link to Standard salesforce.com Help Window.

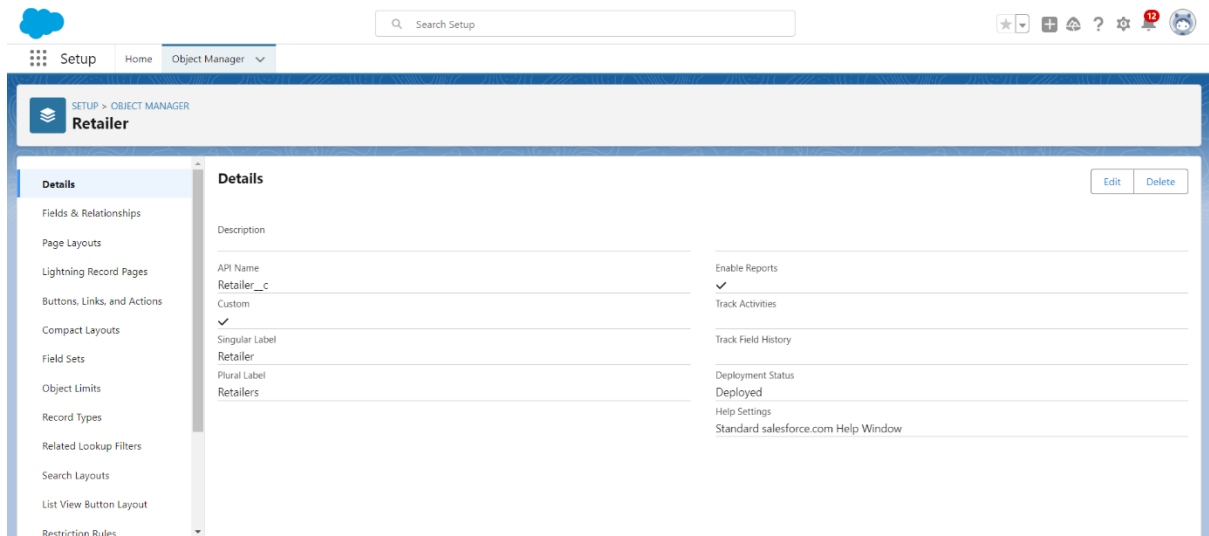
Field	Value
Description	
API Name	Our_Customer__c
Custom	✓
Singular Label	Our Customer
Plural Label	Our Customers
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	
Standard salesforce.com Help Window	

2.Consultant

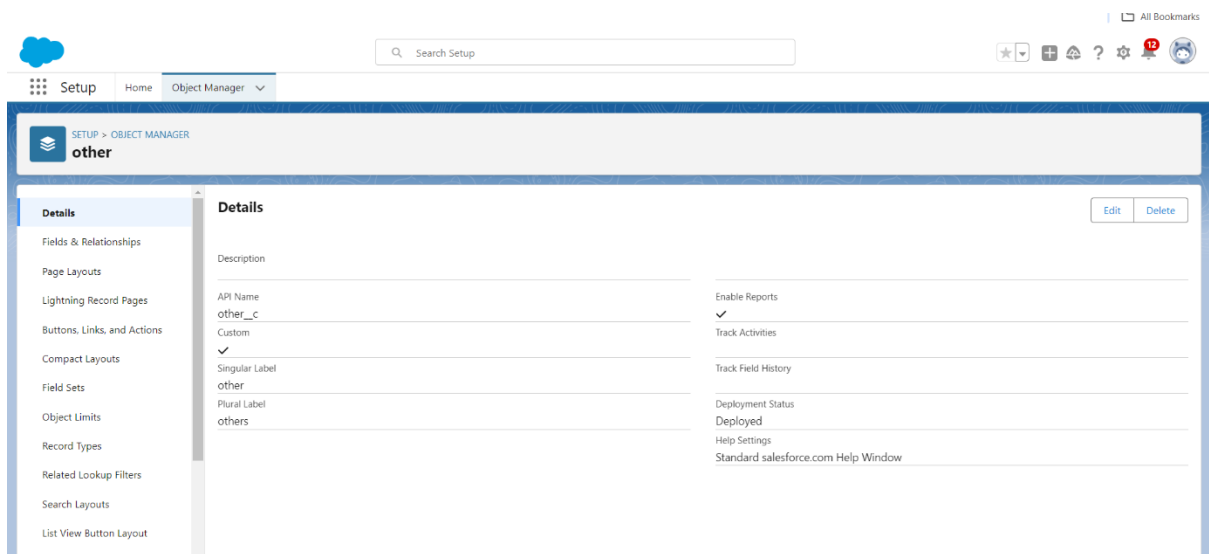
The screenshot shows the Salesforce Setup interface for the 'Consultant' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main content area is titled 'Details' and includes a search bar and 'Edit' and 'Delete' buttons. The details are organized into two columns. The left column contains: Description, API Name (Consultant__c), Custom (checked), Singular Label (Consultant), and Plural Label (Consultants). The right column contains: Enable Reports (checked), Track Activities, Track Field History, Deployment Status (Deployed), Help Settings, and a link to Standard salesforce.com Help Window.

Field	Value
Description	
API Name	Consultant__c
Custom	✓
Singular Label	Consultant
Plural Label	Consultants
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	
Standard salesforce.com Help Window	

3.Retailer



4.Other



Fields and Relationships

Setup

Home

Object Manager

Search Setup

Star

Plus

Cloud

Help

Settings

12

Avatar

Our Customer

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

Fields & Relationships

10 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Additional Information	Additional_Information__c	Text Area(255)		
Address	Address__c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
Customer id	Customer_id__c	Auto Number		
Customer Name	Customer_Name__c	Text(255)		
Email id	Email_id__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Mobile Number	Mobile_Number__c	Phone		

Setup

Home

Object Manager

Search Setup

Star

Plus

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Help

Settings

12

Avatar

Consultant

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

Fields & Relationships

13 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Long Text Area(32768)		
Consultants	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Customer details	Customer_details__c	Lookup(Our Customer)		✓
Customer id	Customer_id__c	Auto Number		
Customer Name	Customer_Name__c	Text(255)		
Delivery Type	Delivery_Type__c	Picklist		
Email id	Email_id__c	Email		



Search Setup



Setup Home Object Manager

SETUP > OBJECT MANAGER
Retailer

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

Restriction Rules

Fields & Relationships

11 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

Created By	CreatedById	Lookup(User)	
Customer Details	Customer_Details__c	Master-Detail(Our Customer)	✓
Customer id	Customer_id__c	Auto Number	
Customer Name	Customer_Name__c	Text(255)	
Delivery Type	Delivery_Type__c	Picklist	
Email Id	Email_id__c	Email	
Last Modified By	LastModifiedById	Lookup(User)	
Mobile Number	Mobile_Number__c	Phone	
Payment	Payment__c	Picklist	



Search Setup



Setup Home Object Manager

SETUP > OBJECT MANAGER
other

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

Restriction Rules

Fields & Relationships

8 Items, Sorted by Field Label

Quick Find

New

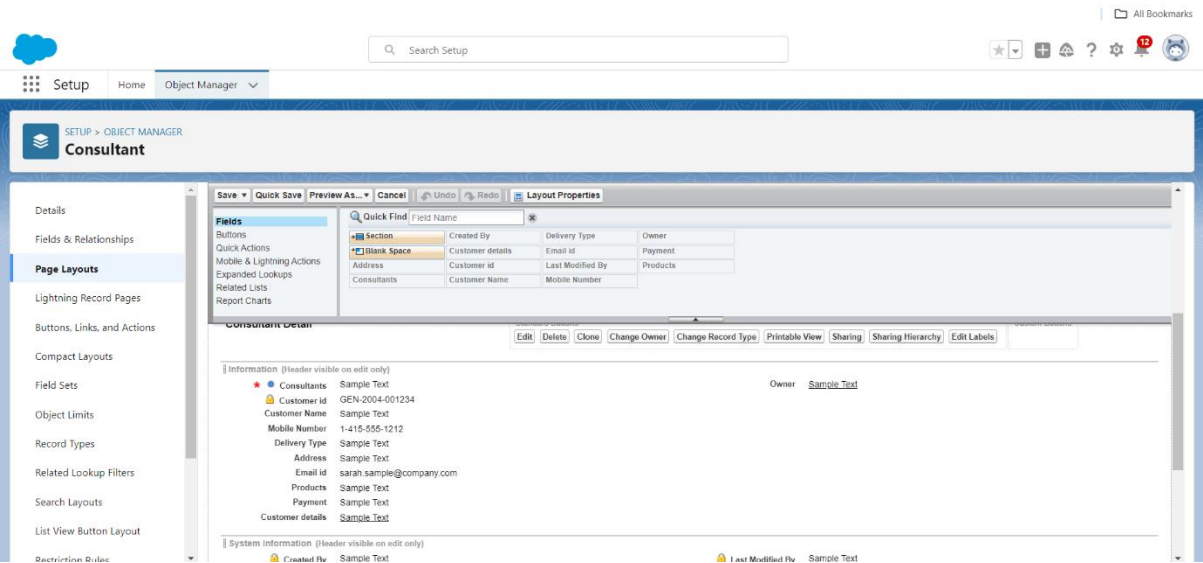
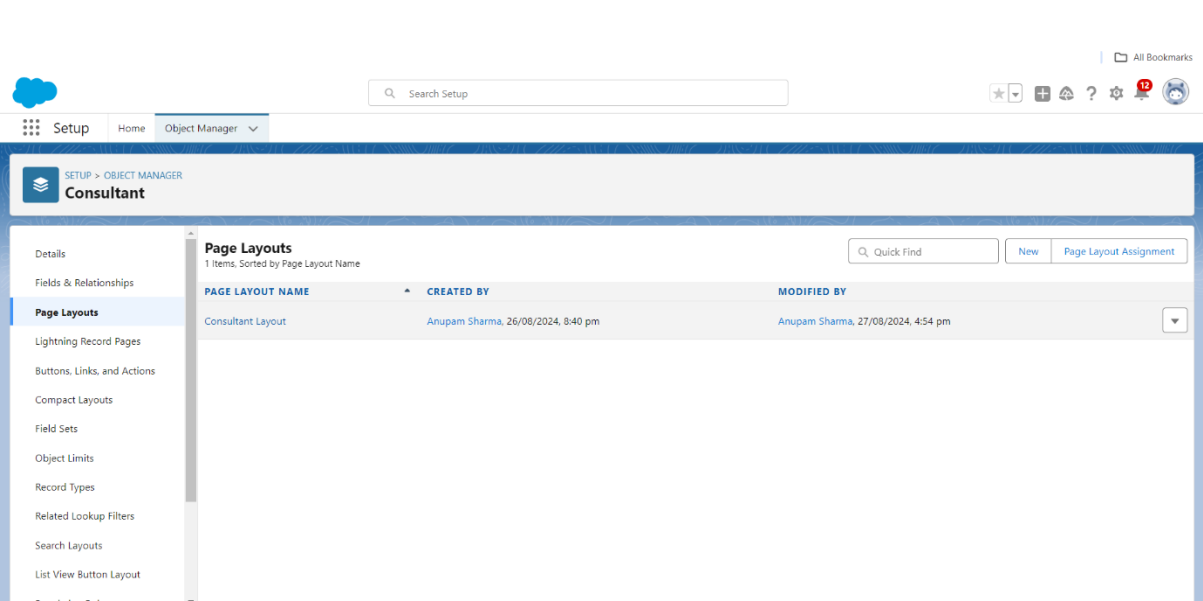
Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Coupon	Coupon__c	Text(255)		
Created By	CreatedById	Lookup(User)		
Employee	Employee__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Text(255)		
others	Name	Text(80)		✓
Owner	OwnerId	Lookup(User,Group)		✓
Products	Products__c	Picklist (Multi-Select)		

Page Layout



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 ⓘ

Urban Color

*Developer Name ⓘ

Urban

Description ⓘ

Enter a description...

App Branding

Image ⓘ

Upload

Primary Color Hex

Value ⓘ

#0070D2


Org Theme Options

☐ Use the app's image and color instead of the org's custom theme.

Next

The screenshot shows the Salesforce Lightning Experience App Manager. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar is located at the top right. The 'App Launcher' sidebar is open, showing a search for 'urbani' and a list of items including 'Urban Color'. The main content area displays a table of installed apps, sorted by App Name. The table has columns for App Name, Developer Name, Description, Last Modified Date, App Type, and Visibility. The table lists 12 apps, including Analytics Studio, App Launcher, Automation, Bolt Solutions, Community, Content, Data Manager, Digital Experiences, Lightning Usage App, Marketing CRM Classic, and Platform.

App Name	Developer Name	Description	Last Modified Date	App Type	Visibility
Analytics Studio	Insights	Build CRM Analytics dashboards and apps	26/08/2024, 7:29 pm	Classic	✓
App Launcher	AppLauncher	App Launcher tabs	26/08/2024, 7:29 pm	Classic	✓
Automation	FlowsApp	Automate business processes and repetitive tasks.	26/08/2024, 7:35 pm	Lightning	✓
Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	26/08/2024, 7:34 pm	Lightning	✓
Community	Community	Salesforce CRM Communities	26/08/2024, 7:29 pm	Classic	✓
Content	Content	Salesforce CRM Content	26/08/2024, 7:29 pm	Classic	✓
Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	26/08/2024, 7:29 pm	Lightning	✓
Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	26/08/2024, 7:29 pm	Lightning	✓
Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	26/08/2024, 7:29 pm	Lightning	✓
Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	26/08/2024, 7:29 pm	Classic	✓
Platform	Platform	The fundamental Lightning Platform	26/08/2024, 7:29 pm	Classic	✓


Urban Color

Our Customers ▾
Consultants ▾
Retailers ▾
others ▾
Reports ▾
Dashboards ▾

★ ▾
+
?
⚙️
🔔 12
👤

Our Customers
Recently Viewed ▾
🔗

New
Import
Change Owner
Assign Label

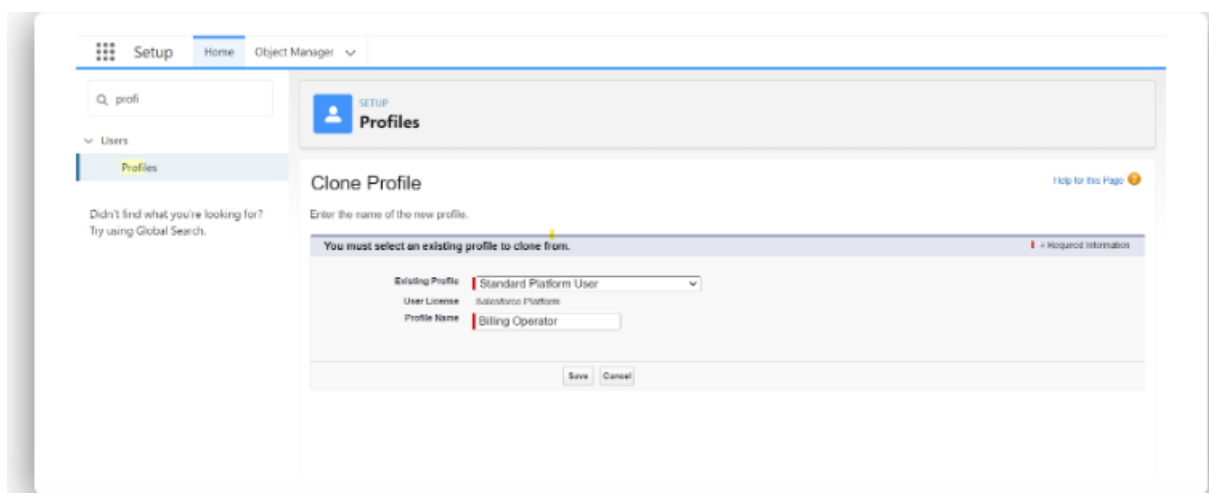
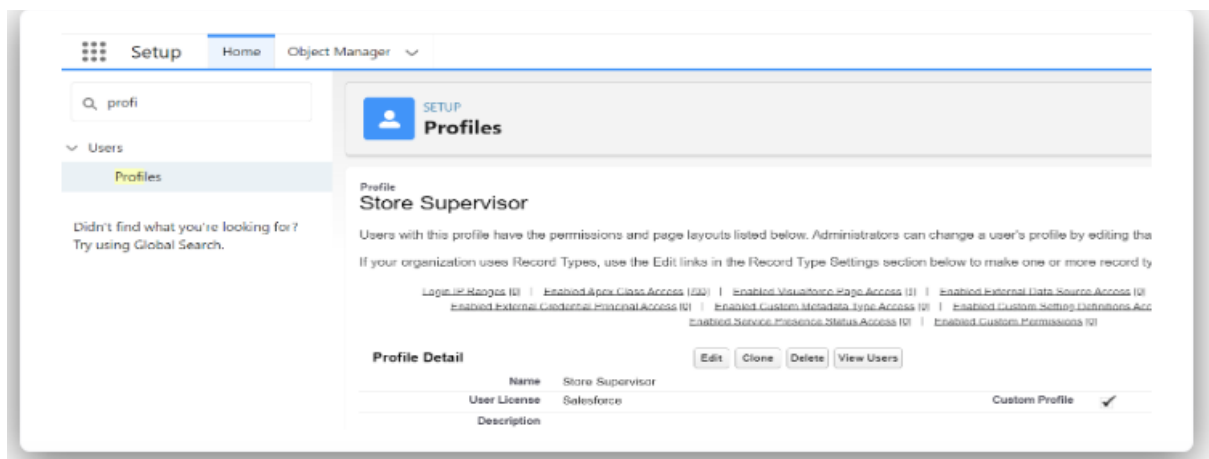
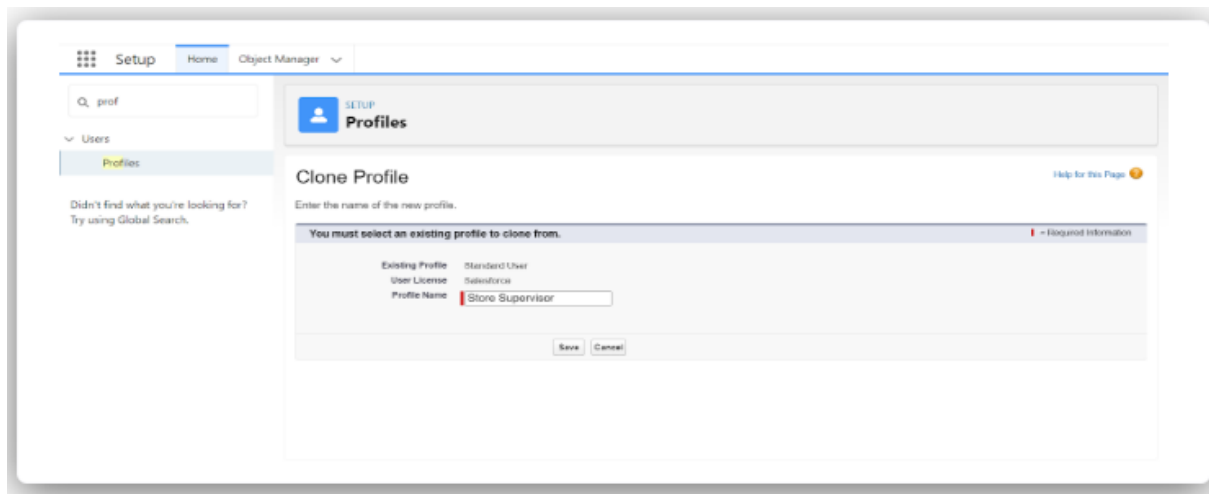
0 items • Sorted by Our Customer • Updated a few seconds ago

⚙️
🗑️
🔄
✎
⚙️
⌵

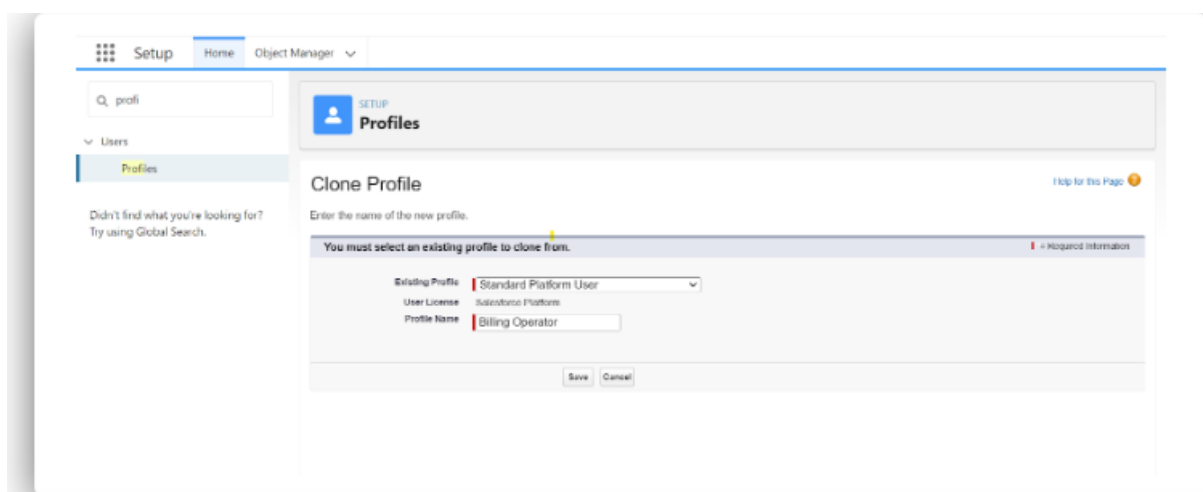
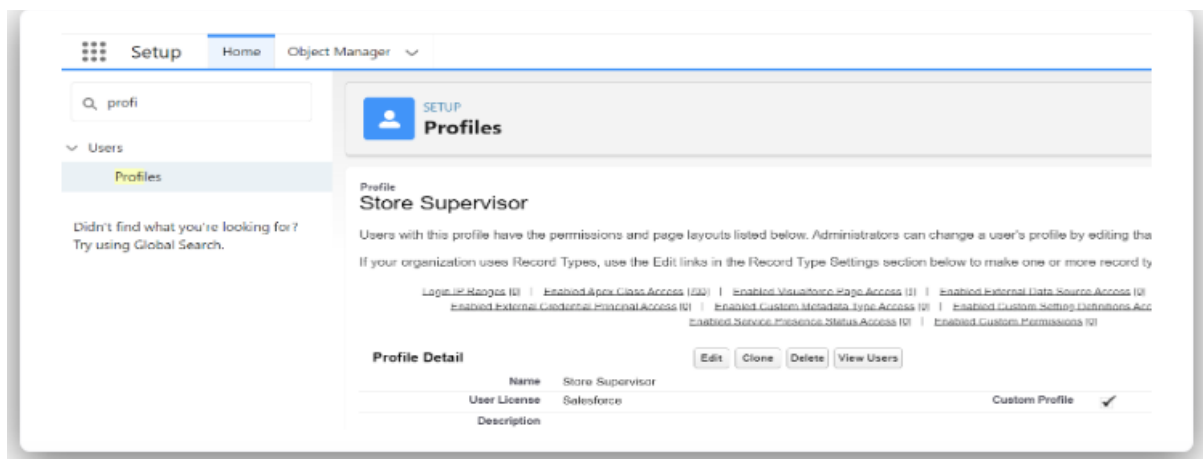
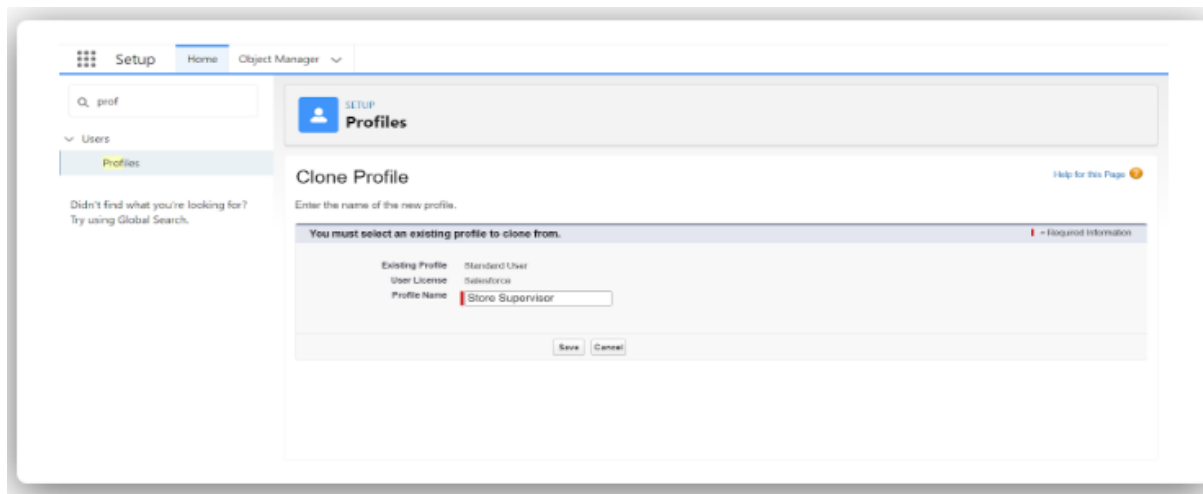
☐ Our Customer ▾

You haven't viewed any Our Customers recently.
Try switching list views.

Profile



Setup Roles



Users

SETUP

Users

User

Amar K

Permission Set Assignments (0)

Permission Set Assignments: Activation Required (0)

Permission Set Group Assignments (0)

Permission Set License Assignments (0)

Personal Groups (0)

Public Group Membership (0)

Permission Set Assignments: Activation Required

Edit Assignments

Permission Set Assignments: Activation Required Help

No records to display

Name	Amar K	Role	Store Head
Alias	ak	User License	Salesforce
Email	214g1a3380@srit.ac.in Verify	Profile	Store Supervisor
Username	214g1a3380@srit.ac.inamar	Active	<input checked="" type="checkbox"/>
Nickname	214g1a3380@srit	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	i
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> i
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> i
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/> i

SETUP

Users

User

Johnny Teddy

Permission Set Assignments (0)

Permission Set Assignments: Activation Required (0)

Permission Set Group Assignments (0)

Permission Set License Assignments (0)

Personal Groups (0)

Public Group Membership (0)

Queue Membership (0)

Team (0)

Managers in the Role Hierarchy (1)

OAuth Apps (0)

Third-Party Account Links (0)

Installed Mobile Apps (0)

Authentication Settings for External Systems (0)

Login History (0+)

User Provisioning Accounts (0)

User Detail

Edit

Sharing

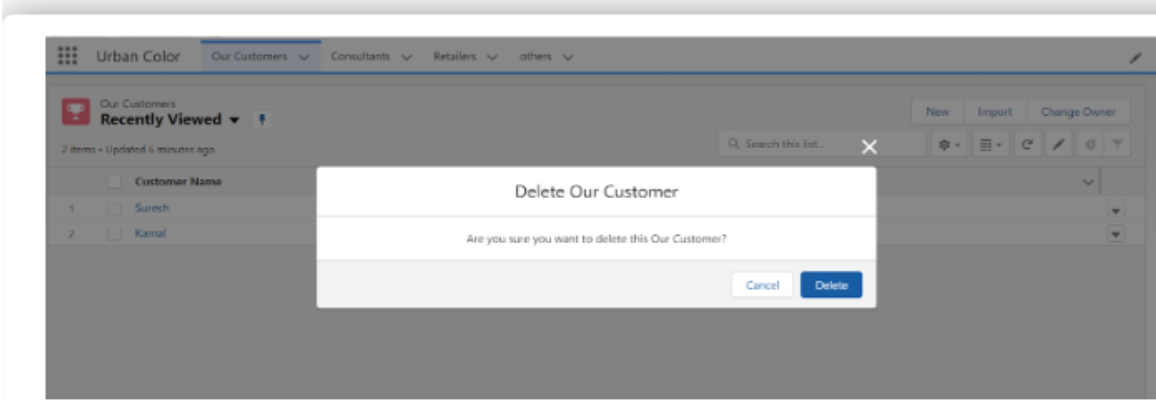
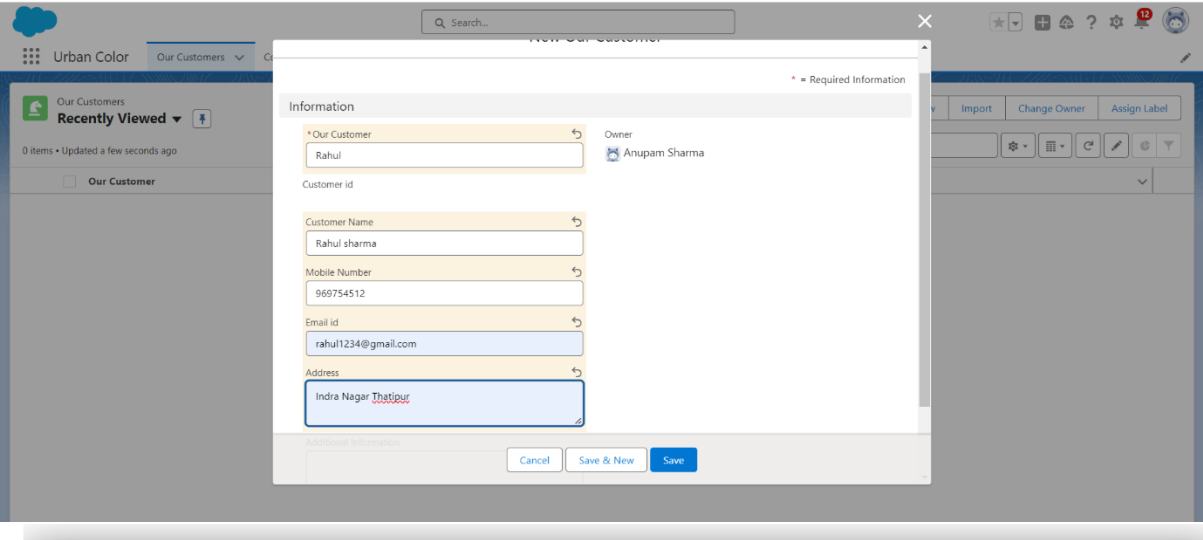
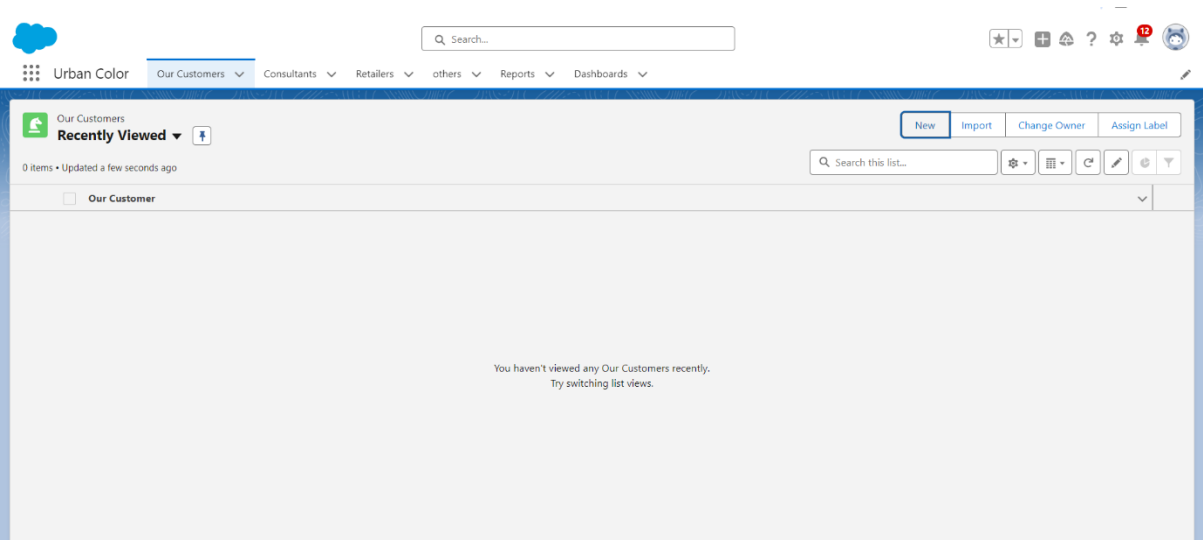
Reset Password

Freeze


View Summary

Name	Johnny Teddy	Role	Billing Operator
Alias	jtedd	User License	Salesforce Platform
Email	214g1a3380@srit.ac.in Verify	Profile	Billing Operator
Username	214g1a3380@srit.ac.injohnny	Active	<input checked="" type="checkbox"/>
Nickname	214g1a3380@sritjohnny	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	i
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> i
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> i
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/> i







User Adoption



Import Data



Search Setup



Setup

Home


Object Manager

your data...


Don't import too many records at once
Using the Data Import Wizard, import up to 50,000 records at a time. Importing too many records can slow down your org for all users, especially during periods of peak usage.

Import your data in 3 easy steps!


Launch the Data Import Wizard to import your data.




Pre-step: Prepare your data for import



Choose data to import



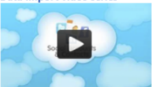
Edit field mapping




Review and start import

Launch Wizard!







FAQ
How do I prepare my data for import?
How many records can I import?
What kind of objects can I import?
Can I do simultaneous imports?

Data Import video series


Additional Resources
Find import templates and other helpful tools
Learn how to use the Data Import Wizard



Search Setup



Setup

Home

Object Manager

Getting closer

Choose data

Edit mapping

Start import

What kind of data are you importing?

Standard objects

Custom objects

Consultants

Our Customers

Retailers

others

What do you want to do?

Add new records

Match by:
--None--

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

Which Our Customer field in your file do you want to match against to set the Customer details lookup field?
--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

Cancel

Previous

Next

Cancel 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

Help for this page

Cancel

Previous

Start Import

Congratulations, your import has started!

Click OK to view your import status on the Bulk Data Load Job page.

OK

Reports

Urban Color

Our Customers Consultants Retailers others Reports Dashboards

Search...

Star

+

🔍

?

⚙️

🔔

👤

All Bookmarks

Reports

Recent

1 item

Search recent reports...

New Report

New Folder

⚙️

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Consultant report		Private Reports	Anupam Sharma	27/8/2024, 7:04 pm	

Created by Me

Private Reports

Public Reports

All Reports

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

Urban Color

Our Customers Consultants Retailers others Reports Dashboards

Search...

Star

+

🔍

?

⚙️

🔔

👤

All Bookmarks

Report: Consultants

Consultant report

Enable Field Editing

Q

Add Chart

▼

🔄

Edit

▼

Total Records
16

Payment type	Customer Name	Delivery Type	Products	Payment
<input type="checkbox"/> Cash (2)	Dev Raj	Self Pickup	Lipstick	Cash
	Dev Raj	Self Pickup	Lipstick	Cash
Subtotal				
<input type="checkbox"/> NetBanking (6)	Ajay	Courier	Compact	UPI
	Ram	Courier	EyeLiner	Credit Card
	Shyam	Self Pickup	FacePack	Debit Card
	Arun	Self Pickup	FacePack	Debit Card
	Anuj	Courier	Compact	Credit Card
	Ajay	Courier	Compact	UPI
Subtotal				
<input type="checkbox"/> - (8)	-	-	-	-
	-	-	-	-
	-	-	-	-

Row Counts

Detail Rows

Subtotals

Grand Total

Dashboards

Urban Color

Our Customers

Consultants

Retailers

others

Reports

Dashboards

Search...

Star

+

Home

?

Settings

12

Profile

Dashboards

Recent

1 item

Search recent dashboards...

New Dashboard

New Folder

⚙

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Consultant Dashboard		Private Dashboards	Anupam Sharma	27/8/2024, 7:34 pm	<div></div>

Created by Me

Private Dashboards

All Dashboards

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

Urban Color

Our Customers

Consultants

Retailers

others

Reports

Dashboards

Search...

Star

+

Home

?

Settings

12

Profile

All Bookmarks

Dashboard

Consultant Dashboard

As of 28-Aug-2024, 10:17 am Viewing as Anupam Sharma

Refresh

Edit

Subscribe

⌵

Consultant report

Record Count

Payment type

8

NetBanking

6

Cash

2

View Report (Consultant report)