

# **Cosmetic Store Management**

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## **Abstract**

Cosmetics Store Management in Salesforce is a comprehensive solution designed to empower cosmetics stores to manage their operations with unparalleled efficiency and effectiveness. Built on the robust Salesforce platform, this innovative solution provides a powerful and scalable foundation for streamlining customer relationships, sales, and inventory management.

By leveraging this cutting-edge technology, cosmetics stores can significantly improve their operational efficiency, enhance customer engagement, and drive business growth. The solution enables real-time visibility into sales performance, customer interactions, and inventory levels, allowing store owners to make data-driven decisions and stay ahead of the competition.

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# 1. Creation Salesforce Org

## Introduction

Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don't know where you should start on your learning journey? If you've answered yes to any of these questions, then you're in the right place. This module is for you.

Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module, we'll take you through these features and answer the question, "What is Salesforce, anyway?"

## What Is Salesforce?

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this:

<https://youtu.be/r9EX3IGde5k>

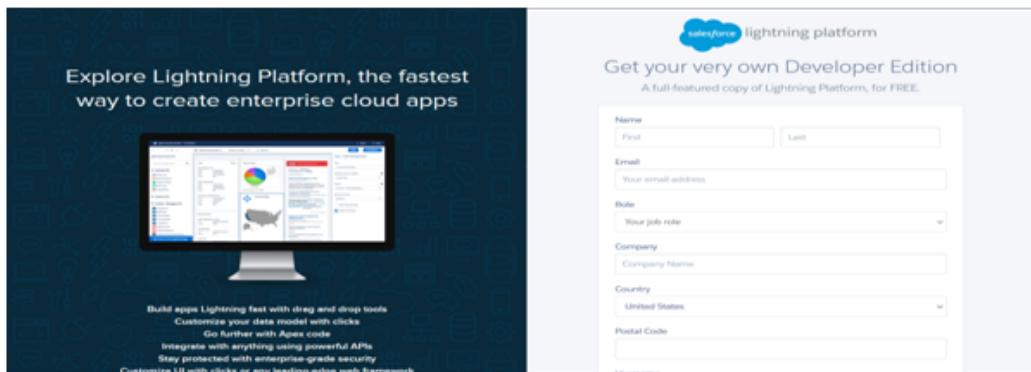
Creating a developer org in salesforce.

1. Go to [developers.salesforce.com/signup](https://developers.salesforce.com/signup).

2. Click on sign up.
3. On the sign up form, enter the following details :
4. First name & Last name
5. Email
6. Role : Developer
7. Company : College Name
8. County : India
9. Postal Code : pin code
10. Username : should be a combination of your name and company.

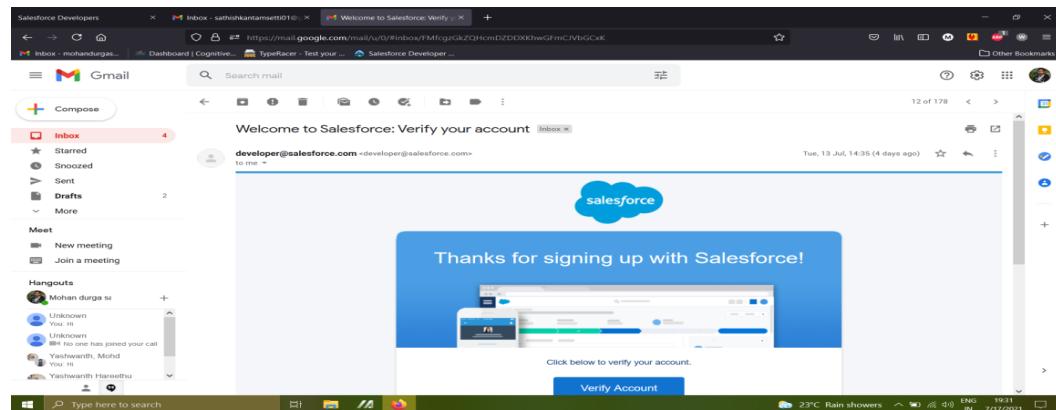
This need not be an actual email id, you can give anything in the format : [username@organization.com](mailto:username@organization.com)

Click on sign up after filling these.



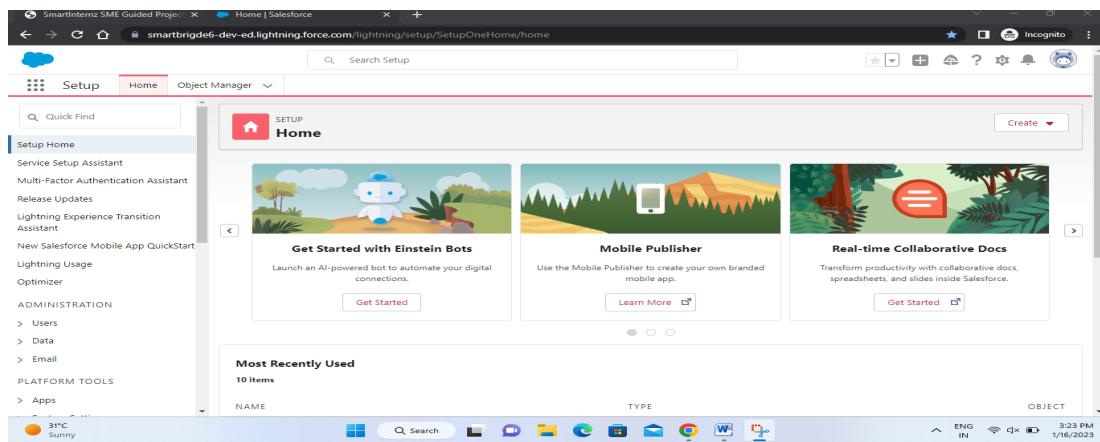
### Account Activation

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



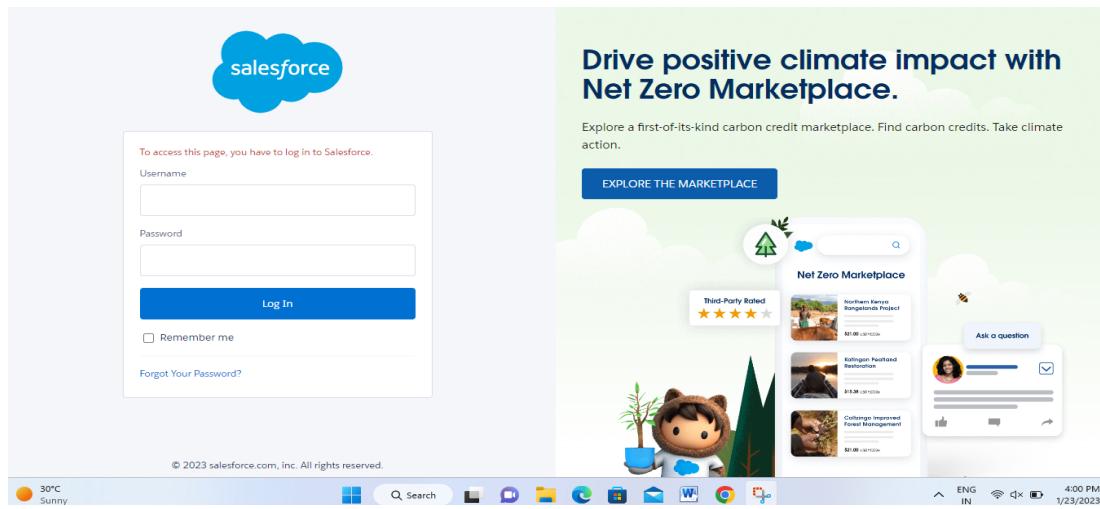
## Login To Your Salesforce Account

1. Go to salesforce.com and click on login.
2. Enter the username and password that you just created.
3. After login this is the home page which you will see.



## Salesforce Login

<https://login.salesforce.com>



## **2. Object**

Salesforce objects are database tables that permit you to store data that is specific to an organisation. Salesforce objects are of two types: Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc. Custom objects:Our Customers,Consultants,Retailers,Others.

### **To Create an object:**

Creation of Objects for Urban Color, For this Urban Color we need to create 3 objects

i.e .,Our Customers,Consultants,Retailers,others.

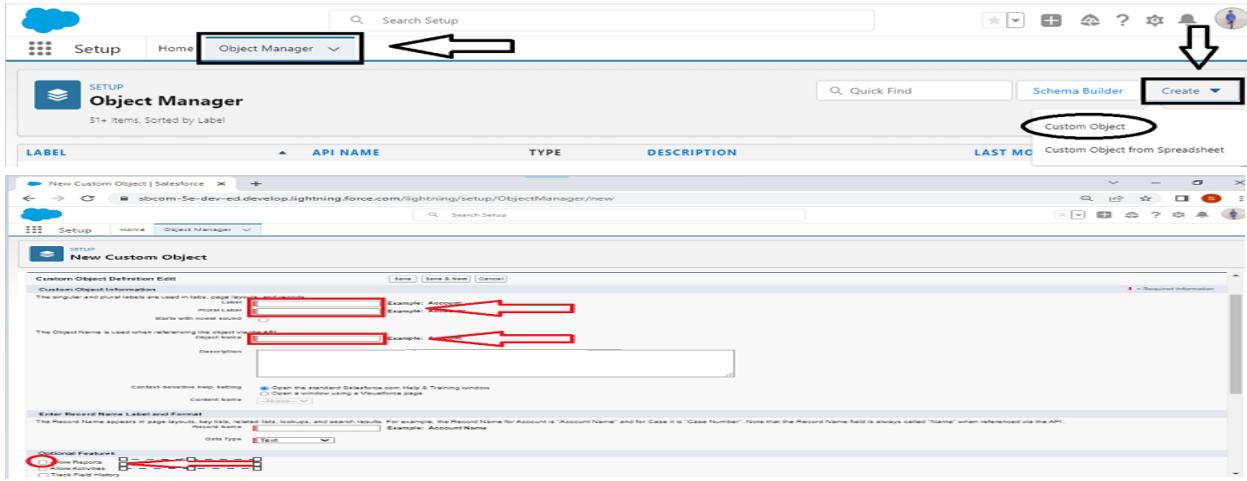
The below steps will assist you in creating those objects.

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

- Leave all defaults as is. Click Next, Next, and Save.



## Consultants Object Creation:

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 Dropdown click on that and select Custom Object.
- Creation of Consultant Object

On the Custom Object Definition page, create the object as follows:

- Label: Consultant
- Plural Label: Consultants
- Record Name: Consultants
- Check the Allow Reports checkbox
- Check the Allow Search checkbox
- Click Save.
- Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs.
- Under Custom Object Tabs, click New.
- For Object, select Consultants.
- For Tab Style, select any icon.

- Leave all defaults as is. Click Next, Next, and Save.

### **Retailers object creation:**

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 Dropdown click on that and select Custom Object.
- Creation of Retailer Object

On the Custom Object Definition page, create the object as follows:

- Label: Retailer
- Plural Label: Retailers
- Record Name: Retailers
- Check the Allow Reports checkbox
- Check the Allow Search checkbox
- Click Save.
- Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs.
- Under Custom Object Tabs, click New.
- For Object, select Retailers.
- For Tab Style, select any icon.
- Leave all defaults as is. Click Next, Next, and Save.

### **Others Object Creation:**

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 Dropdown click on that and select Custom Object.

- Creation of others Object

On the Custom Object Definition page, create the object as follows:

- Label: other
- Plural Label: others
- Record Name: others
- Check the Allow Reports checkbox
- Check the Allow Search checkbox
- Click Save.
- Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs.
- Under Custom Object Tabs, click New.
- For Object, select others.
- For Tab Style, select any icon.
- Leave all defaults as is. Click Next, Next, and Save.

### **3.FIELDS AND RELATIONSHIP**

#### **Fields in Our Customers objects:**

Fields in Our Customers 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	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
7	6)Nail Polish  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 Others 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

## 4. Page Layouts

In Salesforce, page layouts define the organisation 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 organisation.

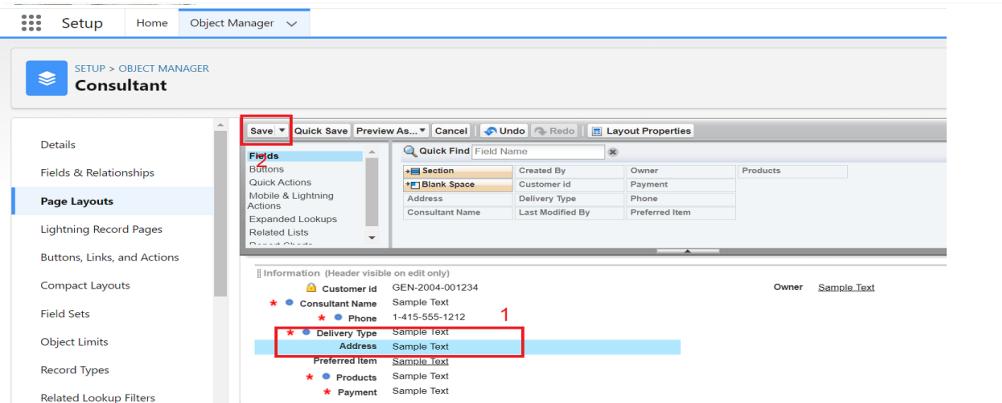
1. From the Salesforce setup menu, go to "Object Manager" and select the Consultants object.
2. Click on "Page Layouts" in the left sidebar. This will display a list of available page layouts for the selected object.
3. Select the Consultant Layout page layout.

The screenshot shows the Salesforce Object Manager for the 'Consultant' object. The left sidebar has a 'Page Layouts' section highlighted with a red box and the number '1'. Under 'Page Layouts', the 'Consultant Layout' is listed with a red box and the number '2'. The main area displays the 'Page Layouts' list with columns for PAGE LAYOUT NAME, CREATED BY, and MODIFIED BY. The 'Consultant Layout' row shows 'Consultant Layout' under PAGE LAYOUT NAME, 'Hazari Ajay Kumar' under CREATED BY, and 'Hazari Ajay Kumar' under MODIFIED BY. A watermark at the bottom reads 'thesmartbridgecom2-dev-ed.develop.lightning.force.com/lightning/.../view'.

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

The screenshot shows the Salesforce Page Layout editor for the 'Consultant' object. The left sidebar has a 'Page Layouts' section highlighted with a red box and the number '1'. The main area shows the 'Fields' section of the layout editor. The 'Fields' list includes 'Section', 'Blank Space', 'Address', 'Delivery Type', and 'Phone'. The 'Information' section below shows fields like 'Customer Id', 'Consultant Name', 'Phone', 'Preferred Item', 'Product', 'Payment', 'Delivery Type', and 'Address', each with sample text values. An arrow points from the 'Delivery Type' field in the list to its corresponding entry in the information section.

5. Click on Save.



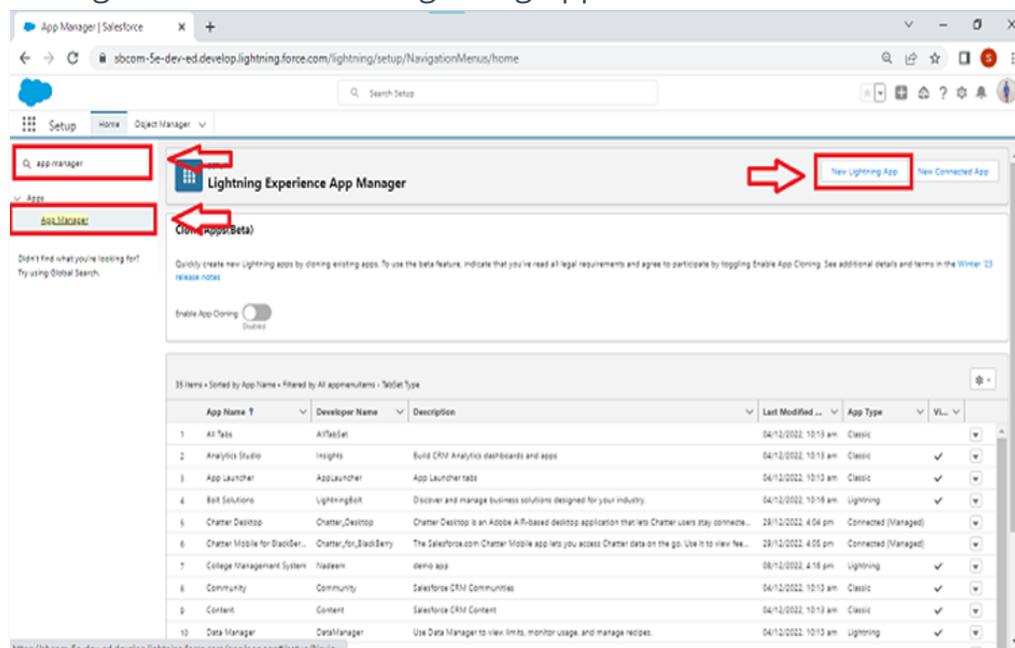
## 5. The Lightning App

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.

### Create a Lightning App :

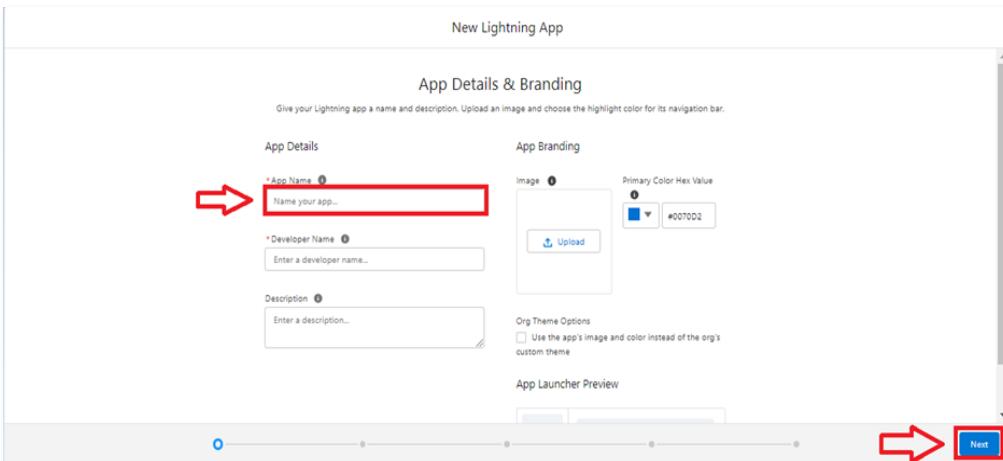
To create a lightning app page:

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

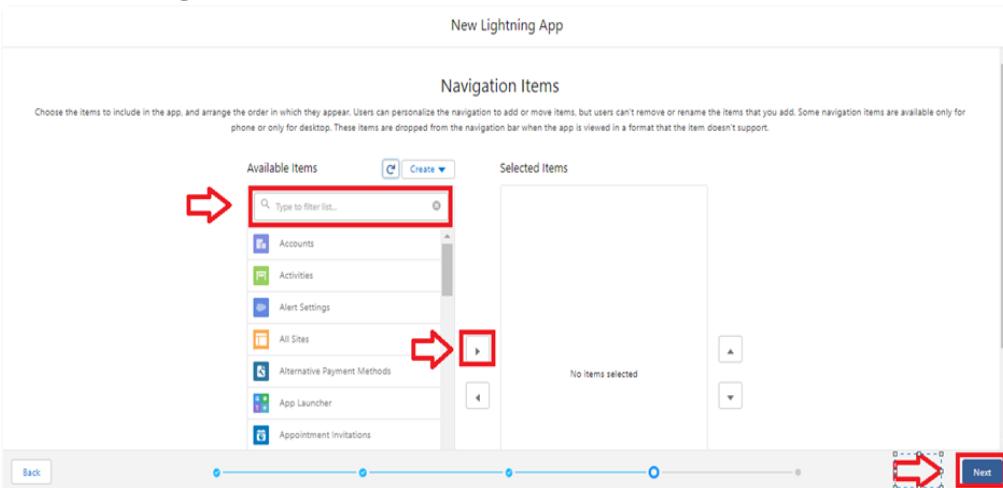


The screenshot shows the Salesforce App Manager interface. At the top, there's a search bar with 'Search Setup' and a 'New' button. Below it, a navigation bar has 'Setup' selected. A red box highlights the 'Search Setup' field. To its right, another red box highlights the 'New Lightning App' button. On the left, there's a sidebar with 'Cloud Apps (Beta)' highlighted by a red box. The main area displays a list of apps with columns for 'App Name', 'Developer Name', 'Description', 'Last Modified', 'App Type', and 'V...'. The first few rows include 'All Tabs', 'Analytics Studio', 'App Launcher', 'Bolt Solutions', 'Chatter Desktop', 'Chatter Mobile for BlackBerry', 'College Management System', 'Community', 'Content', and 'Data Manager'. A note at the bottom says 'Quickly create new Lightning apps by cloning existing apps. To use the beta feature, indicate that you've read all legal requirements and agree to participate by toggling Enable App Cloning. See additional details and terms in the Winter '23 Release notes.' A toggle switch for 'Enable App Cloning' is shown as 'Disabled'.

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.

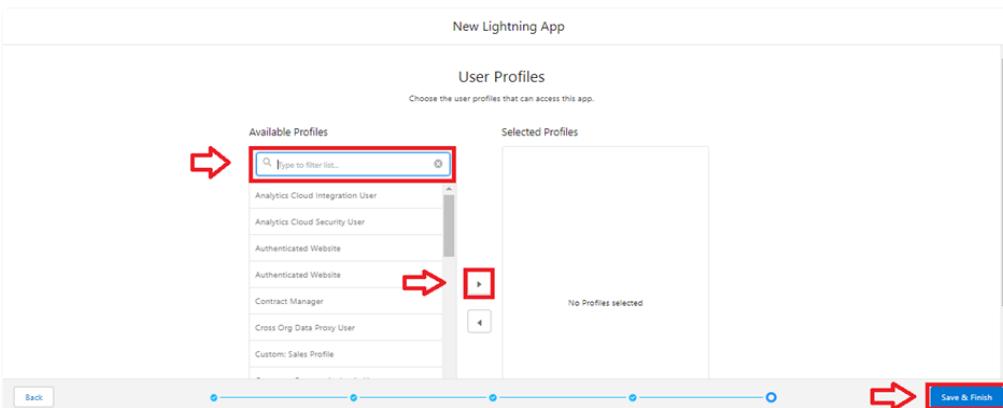


### 3. To Add Navigation Items:



- Select the items (Our Customers, Consultants, Retailers, Others, Reports, Dashboards) from the search bar and move it using the arrow button --> Next.

### 5. To Add User Profiles:



- Search profiles (System administrator) in the search bar --> click on the arrow button --> save & finish.

## **6. Profile**

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. A profile controls "Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges.

### **Creating a Profiles:**

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

### **Creating a Profiles:**

Now 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.
- Click Save.
- While still on the Store Supervisor profile page, then click Edit.
- Scroll down to Custom Object Permissions and give access for Create,Read>Edit,Delete,View all and modify all for Our Customers,Consultants,Retailers,Others.
- Scroll down to Custom App Settings and give access for Urban Color.

To create a new profile:

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

The screenshot shows the Salesforce Setup interface under the Profiles section. A modal window titled "Clone Profile" is displayed, prompting the user to enter a new profile name. The "Profile Name" field contains "Store Supervisor". The "Save" button is visible at the bottom of the modal.

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

The screenshot shows the "Edit" screen for the "Store Supervisor" profile. It includes sections for "Profile Detail" (Name: Store Supervisor, User License: Salesforce, Description: Custom Profile checked), "Permissions" (a large list of standard and custom object permissions with checkboxes), and "Service Provider Access" and "Tab Settings" sections.

The screenshot shows the main "Profiles" list in the Setup interface. The "Store Supervisor" profile is highlighted. Other profiles listed include "Community (standard\_\_Community)", "Content (standard\_\_Content)", "Data Manager (standard\_\_DataManager)", "Digital Experiences (standard\_\_SalesforceCMS)", "Lightning Usage App (standard\_\_LightningInstrumentation)", "LWC LEARNINGS (LWC\_\_LEARNINGS)", "Marketing (standard\_\_Marketing)", "Queue Management (standard\_\_QueueManagement)", "Rental Management (Rental\_Management)", "Salesforce Scheduler Setup (standard\_\_LightningScheduler)", "Sample Console (standard\_\_ServiceConsole)", "Service (standard\_\_Service)", "Service Console (standard\_\_LightningService)", "Site.com (standard\_\_Sites)", "Subscription Management (standard\_\_RevenueCloudConsole)", "Urban Color (Urban\_\_Color)", "Vehicle Management (Vehicle\_Management)", and "WDC (standard\_\_Work)".

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

The screenshot shows the 'Profiles' section in the Salesforce Setup. It displays a grid of checkboxes for assigning permissions to different profiles. The columns represent profiles like 'Consultants' and 'Retailers', and the rows represent objects like 'Async Operation Results' and 'Source Member References'. Checkmarks indicate that specific permissions are granted.

4. Click on Save.
5. Similarly Create operator profile ,Clone Salesforce Platform user and give access only for Billing Operator.

The screenshot shows the 'Clone Profile' page in the Salesforce Setup. It prompts the user to enter a new profile name ('Billing Operator') and clone it from an existing profile ('Standard Platform User'). The 'User License' is set to 'Salesforce Platform'. The 'Save' button is visible at the bottom.

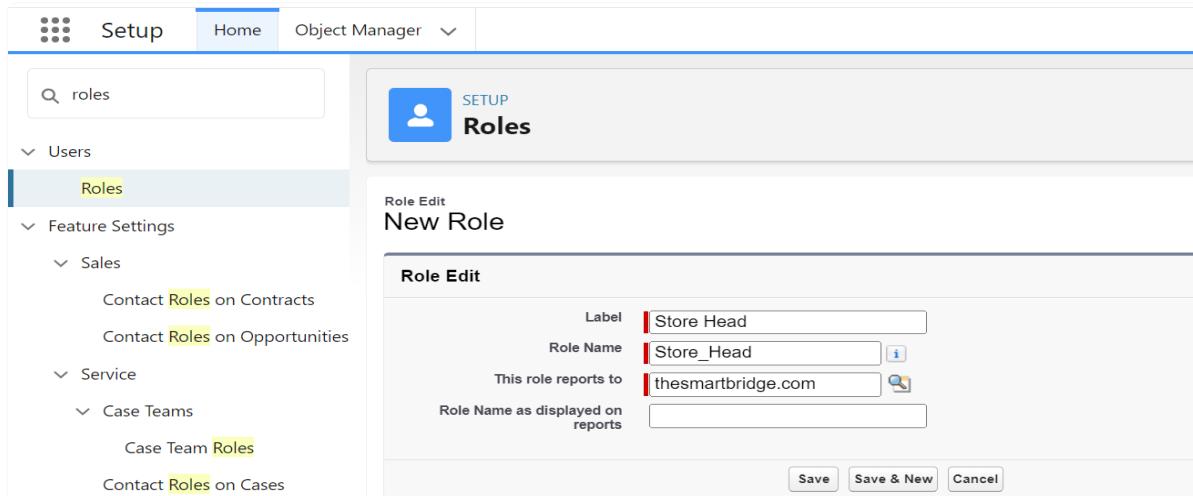
6. Click On Save.

## 7. Setup Roles

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

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

Similarly create One Roles under Store Head as Billing Operator.



Setup Home Object Manager

roles

Users Roles

Feature Settings Sales Contact Roles on Contracts Contact Roles on Opportunities Service Case Teams Case Team Roles Contact Roles on Cases

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

SETUP Roles

New Role

Role Edit

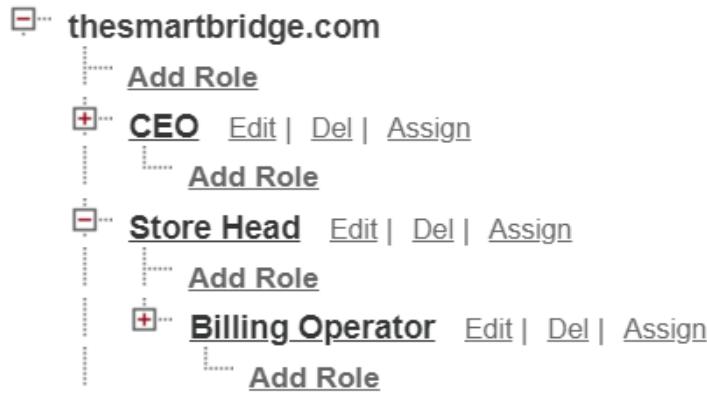
Label: Billing Operator  
Role Name: Billing\_Operator  
This role reports to: Store Head  
Role Name as displayed on reports:

Save Save & New Cancel

Help for this Page

## Your Organization's Role Hierarchy

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



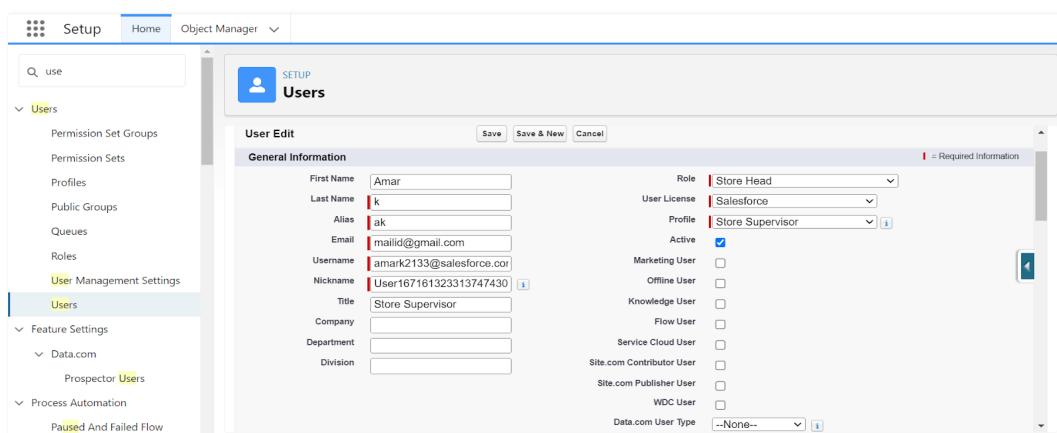
## 8. Users

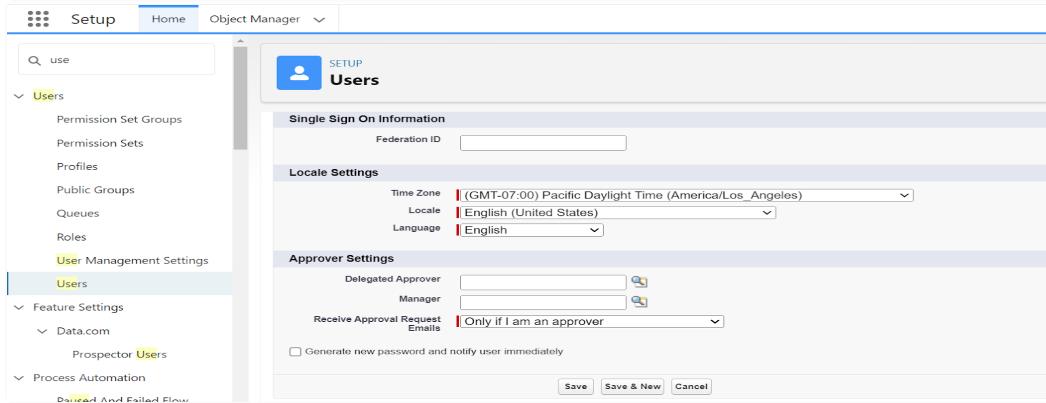
A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account.

### Creating a 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 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 Licence 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.

Fill in the fields (first name, last name, alias, email id, username, nick name, role, user licence, profiles) --> save.





## Second User Creation :

1. From Setup, in the Quick Find box, enter Users, and then select Users.
2. Click New User.
3. Enter the user's name John Teddy and (Your) email address and a unique username in the form of an email address. By default, the username is the same as the email address.
4. Select a Role(Billing Operator)
5. Select a User Licence As Salesforce Platform.
6. Select a profile as Billing Operator.
7. Check Generate new password and notify the user immediately to have the user's login name and a temporary password emailed to your email.

Fill in the fields (first name, last name, alias, email id, username, nick name, role, user licence, profiles) --> save.

The screenshot displays two related screens from the Salesforce Setup interface, both titled "Users".

**User Edit Screen (Top):**

- General Information:**
  - First Name: John
  - Last Name: Teddy
  - Alias: tedd
  - Email: teddyjohn@gmail.com
  - Username: johnneddy@salesforce.com
  - Nickname: User16716029967441631
  - Title: Vehicle Manager
  - Company:
  - Department:
  - Division:
- Role:** Billing Operator
- User License:** Salesforce Platform
- Profile:** Billing Operator
- Active:**
- Marketing User:**
- Offline User:**
- Knowledge User:**
- Flow User:**
- Service Cloud User:**
- Site.com Contributor User:**
- Site.com Publisher User:**
- WDC User:**
- Data.com User Type:**
- Data.com Monthly Addition Limit:** 300
- Accessibility Mode (Classic Only):**
- High-Contrast Palette on Charts:**
- Load Lightning Pages While Scrolling:**
- Debug Mode:**
- Make Setup My Default Landing Page:**

**Buttons:** Save, Save & New, Cancel

**Single Sign On Information Screen (Bottom):**

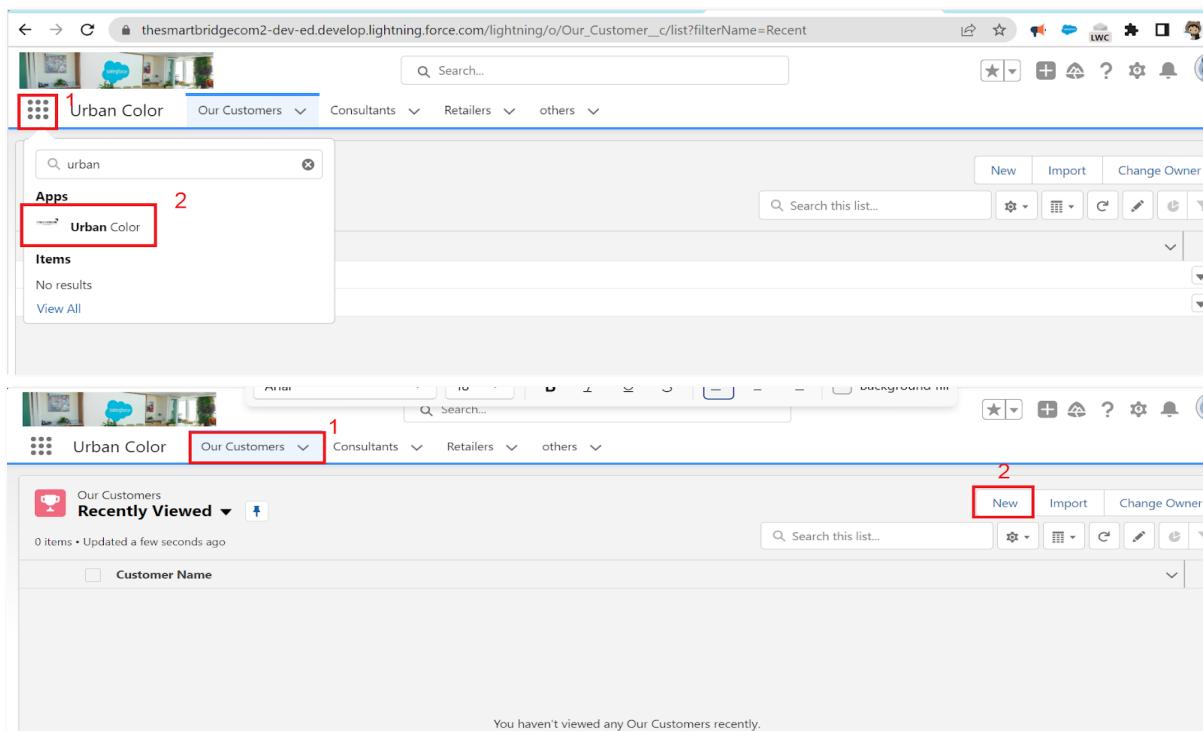
- Single Sign On Information:** Federation ID:
- Locale Settings:**
  - Time Zone: (GMT-07:00) Pacific Daylight Time (America/Los\_Angeles)
  - Locale: English (United States)
  - Language: English
- Approver Settings:**
  - Delegated Approver:
  - Manager:
  - Receive Approval Request Emails:
  - Generate new password and notify user immediately

**Buttons:** Save, Save & New, Cancel

## 9. User Adoption

### Create Our Customer Record:

1. Click on App Launcher on left side of screen.
2. Search Urban Color & click on it.
3. Click on Our Customer tab.
4. Click new button.
5. Fill all Our Customer record details.
6. Click on Save Button.



**Information**

1

\* Customer Name  
  

Complete this field.

Customer id

\* Phone  
  

Email id

Address

**Save** 2

**Cancel** **Save & New**

### View Record (Our Customer):

1. Click on App Launcher on the left side of the screen.
2. Search Urban Color & click on it.
3. Click on Our Customer Tab.
4. Click on any record name. you can see the details of the Our Customer

1

Urban Color Our Customers Consultants Retailers others

2 items • Updated a few seconds ago

#	Customer Name
1	<input type="checkbox"/> Suresh <span style="border: 2px solid red; padding: 2px;">2</span>
2	<input type="checkbox"/> Kamal

1

2

Our Customer  
**Suresh**

**Related** **Details**

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

## Delete Record (Our Customer):

1. Click on App Launcher on the left side of the screen.
2. Search Urban Color & click on it.
3. Click on Our Customer Tab.
4. Click on Arrow at right hand side on that Particular record.
5. Click delete and delete again.

The image consists of two screenshots of a Salesforce application interface. Both screenshots show a list of customers under the 'Our Customers' tab. The top screenshot shows a context menu for a selected customer record, with the 'Delete' option highlighted. The bottom screenshot shows a confirmation dialog box titled 'Delete Our Customer' asking if the user is sure they want to delete the record.

**Screenshot 1:** The top part of the image shows the Salesforce interface with the 'Our Customers' tab selected (highlighted with a red box). A context menu is open over a specific customer record, with the 'Delete' option highlighted (also highlighted with a red box). Red numbers 1, 2, and 3 are overlaid on the interface to indicate the sequence of steps: 1 points to the 'Our Customers' tab, 2 points to the context menu arrow, and 3 points to the 'Delete' button in the menu.

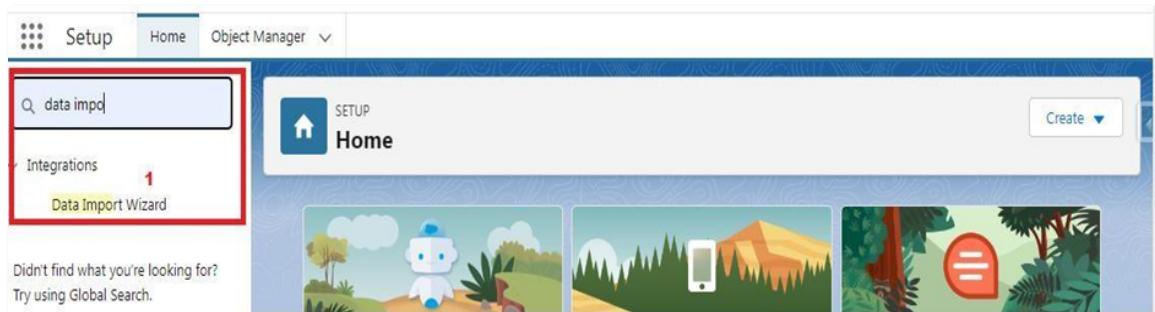
**Screenshot 2:** The bottom part of the image shows the same Salesforce interface after the deletion process has been initiated. A confirmation dialog box is displayed in the center, asking 'Are you sure you want to delete this Our Customer?'. The dialog has 'Cancel' and 'Delete' buttons. The background list of customers is visible but appears slightly dimmed.

## 10. Import Data

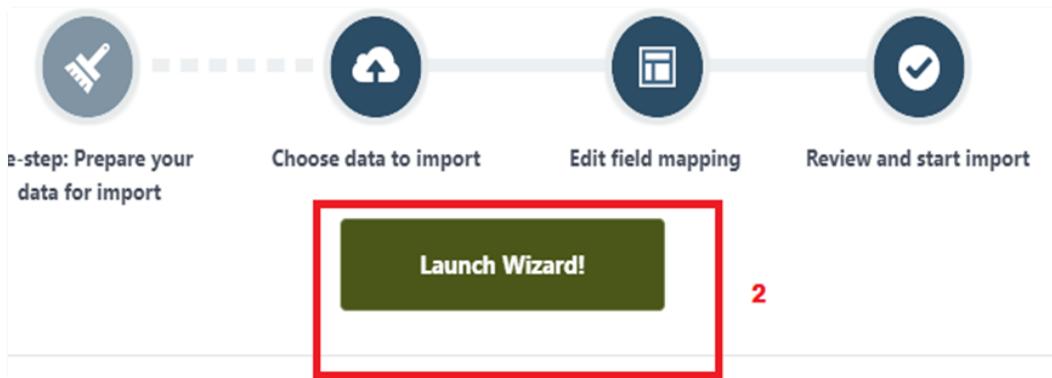
Data Import Wizard—this tool, accessible through the Setup menu, lets you import data in common standard objects, such as contacts, leads, accounts, as well as data in custom objects.

### To Import Data :

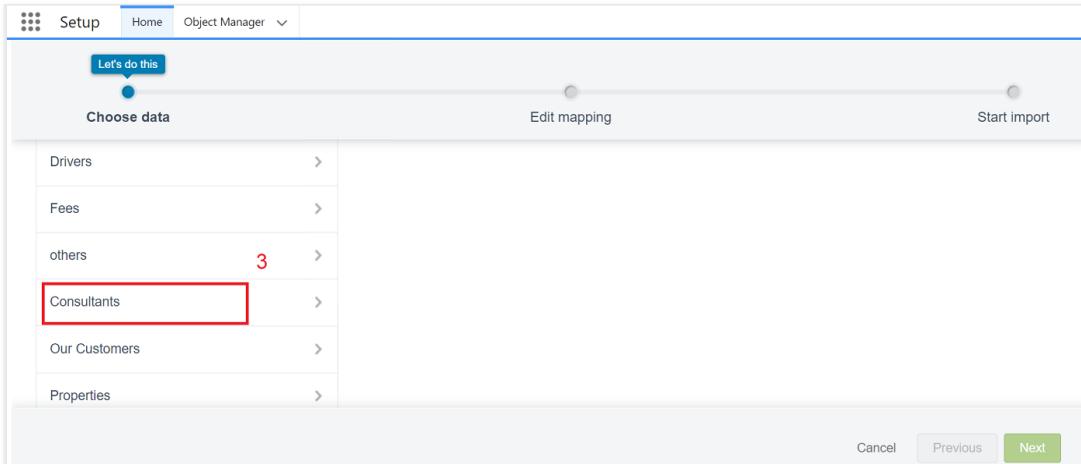
1. From Setup, click the Home tab.
2. In the Quick Find box, enter Data Import and select Data Import Wizard.



3. Click Launch Wizard!



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



## 5. Select Add new records.

### Import your Data into Salesforce

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

What kind of data are you importing?	What do you want to do?	Where is your data located?
Standard objects	Add new records	Where is your data located?
Custom objects	Update existing records	
Attendees	Add new and update existing records	
Buyers		

## 6. Click CSV and choose file Consultant\_CS1 which we made earlier. Click Next.

What kind of data are you importing?	What do you want to do?	Where is your data located?
Standard objects	Add new records	Where is your data located?
Custom objects		
Attendees	Match by:	Drag CSV file here to upload
Buyers	-None-	
Customers	Which User field in your file designates record owners?	
Departments	-None-	
	Trigger workflow rules and processes?	
	<input type="checkbox"/> Trigger workflow rules and processes for new and updated records	

## 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.

The screenshot shows the 'Edit Field Mapping' step of the Data Import Wizard. At the top, a progress bar indicates 'Almost done'. Below it, a table maps CSV headers to Salesforce fields. The 'Mapped Salesforce Object' column is highlighted with a red box. The 'Next' button at the bottom right is also highlighted with a red box.

Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	Consultant Name	Consultant Name	Dev Raj	Ajith	Babu
Change	Mobile Number	Mobile Number	984638732	784653673	902839439
Change	Delivery Type	Delivery Type	Self Pickup	Courier	Self Pickup
Change	Address	Address		Hyderabad	
Change	Products	Products	Lipstick	Compact	Face Pack
Change	Payment	Payment	Cash	UPI	Credit Card
Change	Email	Email		ajith@gmail.com	Babu34@gmail.com

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

The screenshot shows the 'Review & Start Import' step. It displays a summary of the import: 7 mapped fields and 0 unmapped fields. The 'Start Import' button at the bottom right is highlighted with a red box.

9. Click OK on the popup.

The screenshot shows a confirmation message: 'Congratulations, your import has started! Click OK to view your import status on the Bulk Data Load Job page.' The 'OK' button at the bottom right is highlighted with a red box.

10. Scroll down the page and verify that your data has been imported under batches.

The screenshot shows a table titled 'Batches' with one row of data. The last column, 'Status', shows 'Completed'.

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	State Message	Status
	<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.

## 11. Reports

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

There are 4 types of report formats in Salesforce:

1. Tabular Reports:

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

2. Summary Reports:

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

3. Matrix Report:

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

4. Joined Reports:

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

### Report types:

Report type determines which set of records will be available in a report. Every report is based on a particular report type. The report type is selected first when we

create a report. Every reporttype has a primary object and one or more related objects. All these objects must be linked together either directly or indirectly.

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

There are 2 types of report types:

1. Standard Report Types:

Standard Report Types are automatically included with standard objects and also with custom objects where “Allow Reports” is checked.

Standard report types cannot be customized and automatically include standard and custom fields for each object within the report type. Standard report types get created when an object is created, also when a relationship is created.

Note: Standard report types always have inner joins.

2. Custom Report Types:

Custom report types are reporting templates created to streamline the reporting process. Custom Reports are created by an administrator or User with “Manage Custom Report Types” permission. Custom report types are created when standard report types cannot specify which records will be available on reports.

In custom report types we can specify objects which will be available in a particular report. The primary object must have a relationship with other objects present in a report type either directly or indirectly.

There are 3 types of access levels of folders:

1. Viewer:

With this access level, users can see the data in a report but cannot make any changes except cloning it into a new report.

2. Editor:

With this access level, users can view and modify the reports it contains and can also move them to/from any other folders they have access level as Editor or Manager.

3. Manager:

With this access level, users can do everything Viewers & Editors can do, plus they can also control other user's access levels to this folder. Also, users with Manager Access levels can delete the report.

## 12. Dashboards

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

### Create Dashboard:

1. Click on the Dashboards tab from the 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 chart, table etc. as per your choice/requirement.
8. Click add.
9. Click save.

The screenshot shows the Urban Color application interface. At the top, there is a navigation bar with links: 'Urban Color', 'Our Customers', 'Consultants', 'Retailers', 'others', 'Reports', and 'Dashboards'. The 'Dashboards' link is highlighted with a red box and the number '1'. Below the navigation bar, there is a search bar labeled 'Search recent dashboards...' and a 'New Dashboard' button, both of which are also highlighted with red boxes and numbers '2' and '3' respectively. The main area is titled 'New Dashboard'. It has fields for 'Name' (containing 'Consultant Dashboard'), 'Description' (empty), and 'Folder' (containing 'Private Dashboards'). There is a 'Select Folder' button next to the folder field. At the bottom, there are 'Cancel' and 'Create' buttons, with the 'Create' button highlighted with a red box and the number '4'.

Urban Color Our Customers Consultants Retailers others Reports Dashboards

Consultant Dashboard

+ Component

Select Report

Reports

Recent

Created by Me

Private Reports

Public Reports

All Reports

Folders

Created by Me

Shared with Me

All Folders

Select Report

Search Reports and Folders...

Consultants Report Hazari Ajay Kumar - [REDACTED] Private Reports

Sample Flow Report: Screen Flows Automated Process - Dec 17, 2022, 7:50 PM - Public Reports

Opportunities Details Hazari Ajay Kumar - Apr 13, 2023, 12:02 AM - Private Reports

Rental New 1 Hazari Ajay Kumar - Feb 2, 2023, 10:43 PM - Public Reports

Reports and Folders

Cancel Select

6

Add Component

Report

Consultants Report

Use chart settings from report

Display As

7

Payment type

X-Axis

Record Count

Preview

Consultants Report

Record Count

0 2 4 6 8

Net Banking 7

Cash 2

View Report (Consultants Report)

Cancel Add

8

Urban Color Our Customers Consultants Retailers others Reports Dashboards

Consultant Dashboard

+ Component + Filter Save Done

9

Consultants Report

Record Count

0 2 4 6 8

Net Banking 7

Cash 2

View Report (Consultants Report)

## View Dashboard:

1. Click on App Launcher on the left side of the screen.
2. Search Candidate Internal Result Card & click on it.
3. Click on Dashboard Tab.
4. Click on Candidate Internal Result Card see graph view of records.

The screenshot shows the Salesforce App Launcher interface. A red box labeled '2' highlights the search bar where 'Urban Color' has been typed. Another red box labeled '4' highlights the 'Consultant Dashboard' entry in the 'Recent' section of the dashboard list.

**App Launcher Screenshot:**

- Setup
- Home
- Object Manager

Search bar: Urban Color

Apps: Urban Color

Items:

- Asset Action Sources
- Data Use Purpose
- Operating Hours
- Our Customers
- Return Orders
- View More

Optimizer

ADMINISTRATION

- Users
- Data
- Email

PLATFORM TOOLS

- Subscription Management
- Apps
- Feature Settings

Urban Color

Get Started with Einstein Bots

Mobile Publisher

Real-time Collaborative Docs

Most Recently Used

NAME	TYPE	OBJECT
Customer Details	Custom Field Definition	Consultant

Recent

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Consultant Dashboard		Private Dashboards	Hazari Ajay Kumar	6/20/2023, 10:46 PM	
Created by Me	Opportunities Details		Private Dashboards	Hazari Ajay Kumar	4/12/2023, 11:57 PM	
Private Dashboards	Oppurtunity details		Private Dashboards	Hazari Ajay Kumar	4/12/2023, 11:48 PM	

All Dashboards

FOLDERS