

Cosmetic Store Management

Description :

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

Summary :

Key Features:

1. Customer Management:

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

2. Product Management:

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

3. Sales Management:

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

4. Marketing & Promotions:

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

5. Customer Service:

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

6. Integration & Automation:

- **Salesforce Integration:** Integrate with other systems such as ERP or e-commerce platforms to ensure seamless data flow.
- **Workflow Automation:** Automate repetitive tasks and processes to increase operational efficiency and reduce manual errors.

TASKS :

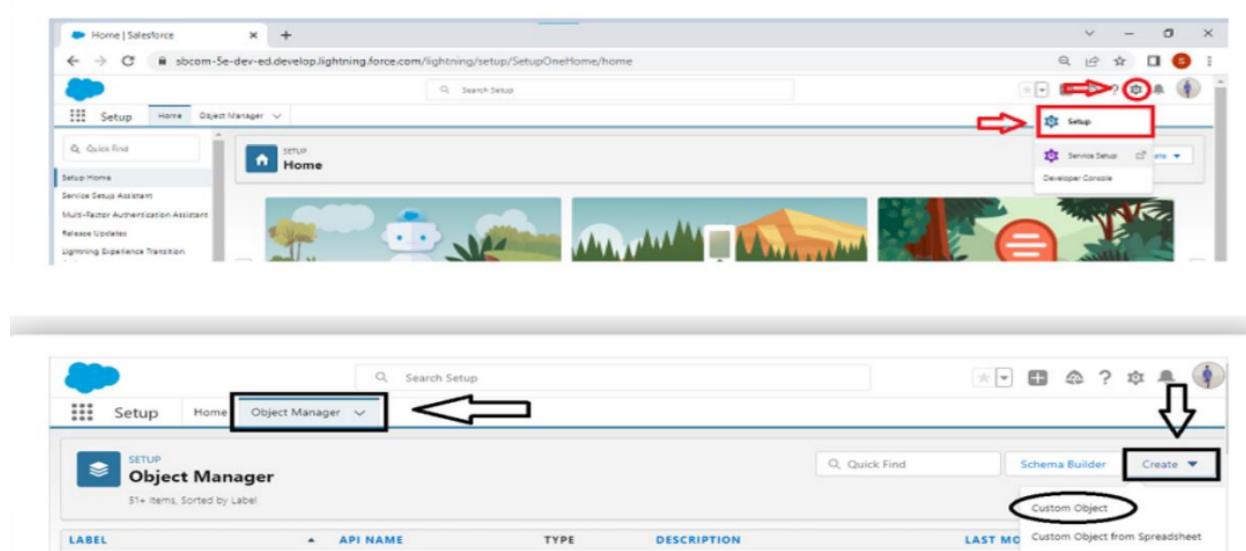
1.Creating the Objects :

To Create an object:

Creation of Objects for Urban Colour, For this Urban Colour 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 and Allow Search checkbox and 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.



The image consists of two screenshots of the Salesforce Setup interface. The top screenshot shows the main Setup menu with 'Setup' highlighted. The bottom screenshot shows the 'Object Manager' page where the 'Create' button has been clicked, opening a dropdown menu with 'Custom Object' selected.

We need to create four objects named Our customer, Consultant, Retailer, and Others. For creating the other three objects, we need to follow the same procedure as mentioned above. After the completion of the object creation task, We'll move on to further steps.

Task2 : Creating Fields and Relationship :

- An object relationship in Salesforce is a two-way association between two objects. Relationships are created by creating custom relationship fields on an object. This is done so that when users view records, they can also see and access related data.

Fields in Our Customers objects :

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 Other objects follow below data types:

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

- In the Cosmetic Store Management System built on Salesforce, fields and relationships are designed to streamline operations and enhance data management. Key fields include customer

details (e.g., contact information and purchase history), product specifics (e.g., SKU, price, and inventory levels), order details (e.g., order status and shipping info), marketing campaign attributes, and case management elements. Relationships are structured to connect these fields efficiently: customers can have multiple orders and cases, each order can include multiple products, and products are linked to inventory and suppliers.

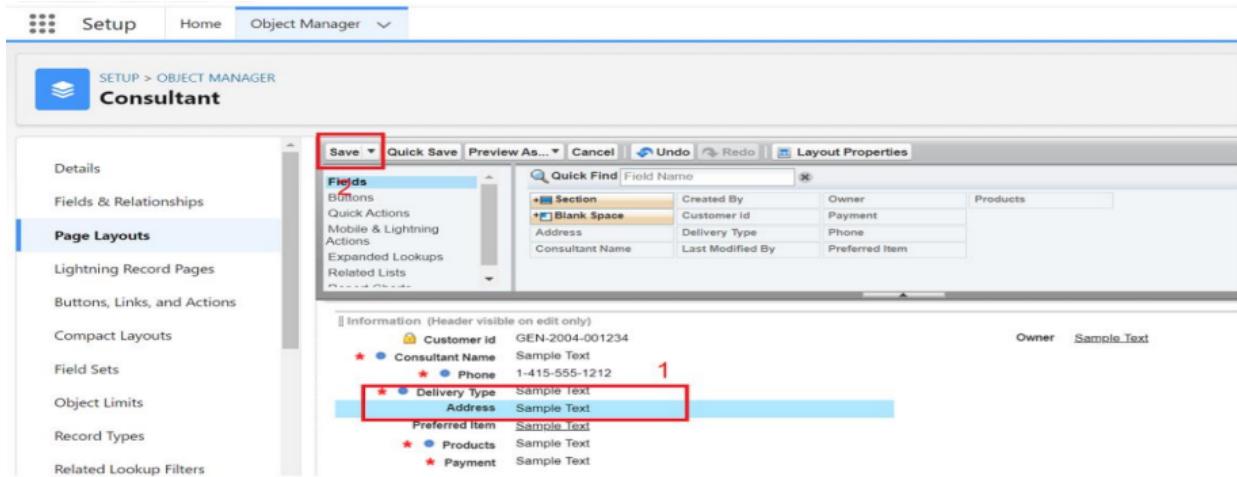
Task 3: Page Layout creation :

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

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Consultant Layout	Hazari Ajay Kumar, 4/1/2023, 7:25 AM	Hazari Ajay Kumar, 6/18/2023, 10:30 PM

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

5. Click on Save.

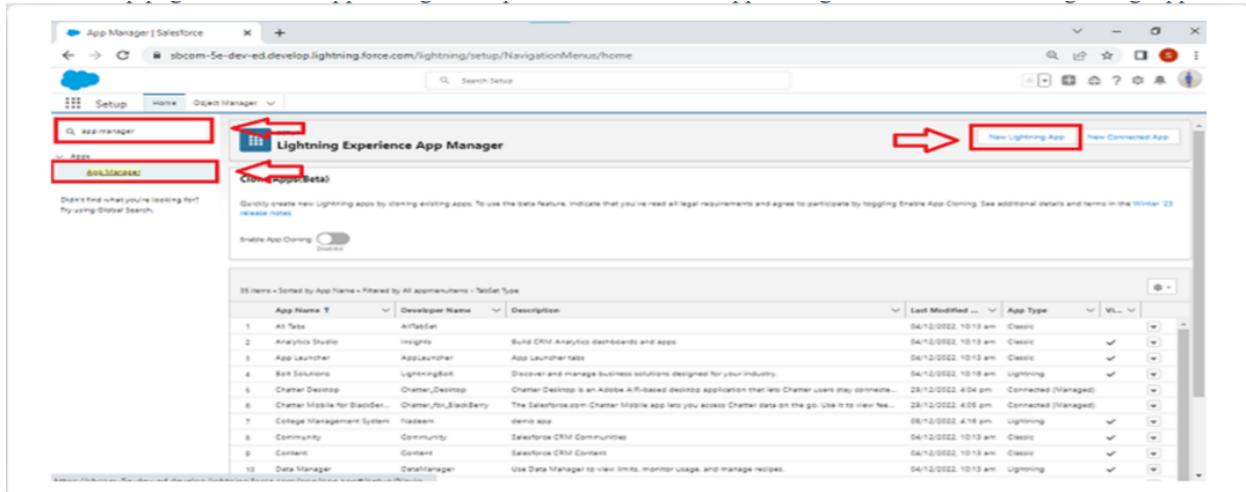


- Creating a page layout in Salesforce involves navigating to the object manager, selecting the relevant object, and either creating a new layout or editing an existing one. You can design the layout by dragging and dropping fields, adding sections and related lists, and including buttons or links as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

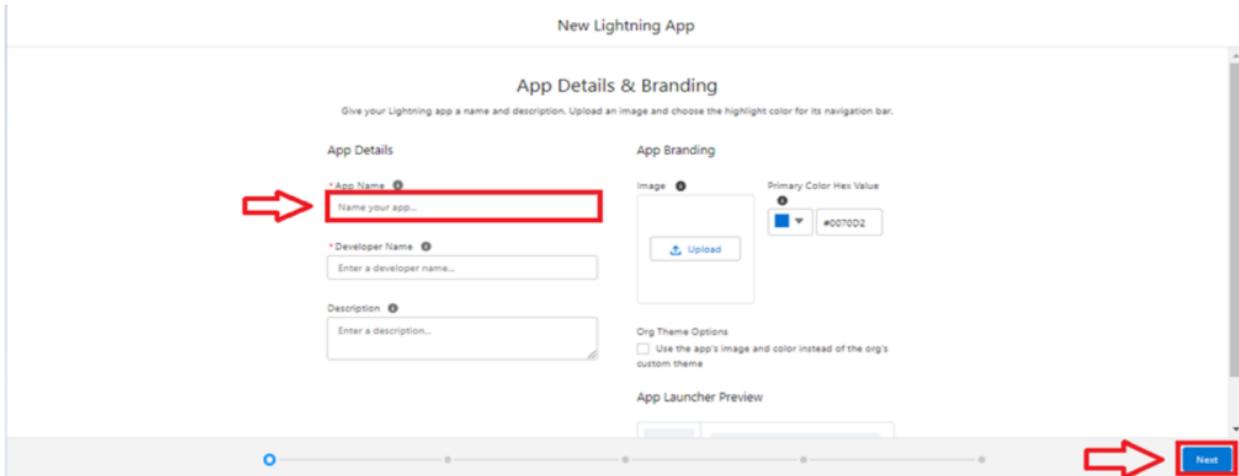
Task 4 : Creation of a Lightning App :

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

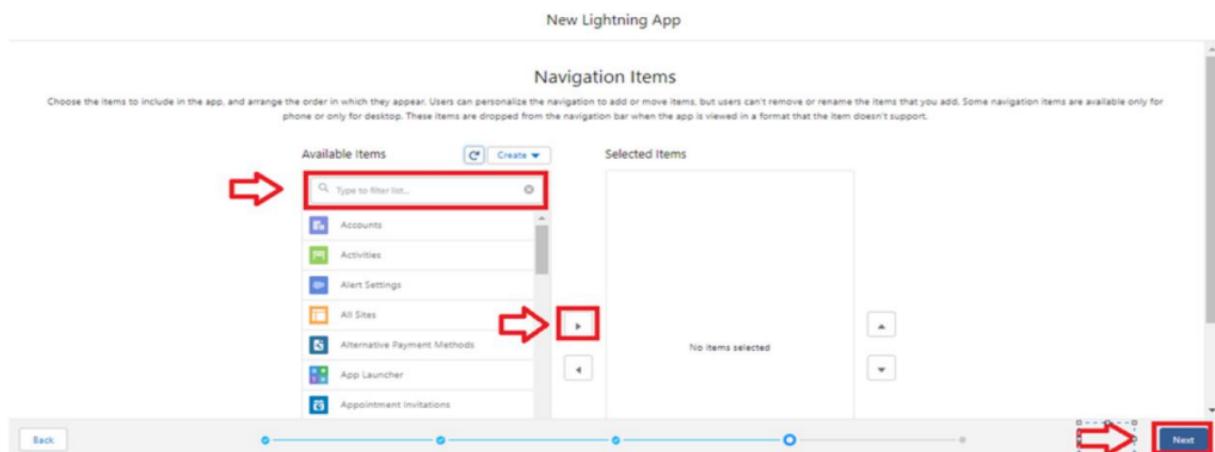
1. Go to the setup page --> search “app manager” in quick find --> select “app manager” --> click on New lightning App.



2. Fill the app name as Urban Colour in app details and branding --> Next --> (App option page) keep it as default --> Next - -> (Utility Items) keep it as default --> Next.

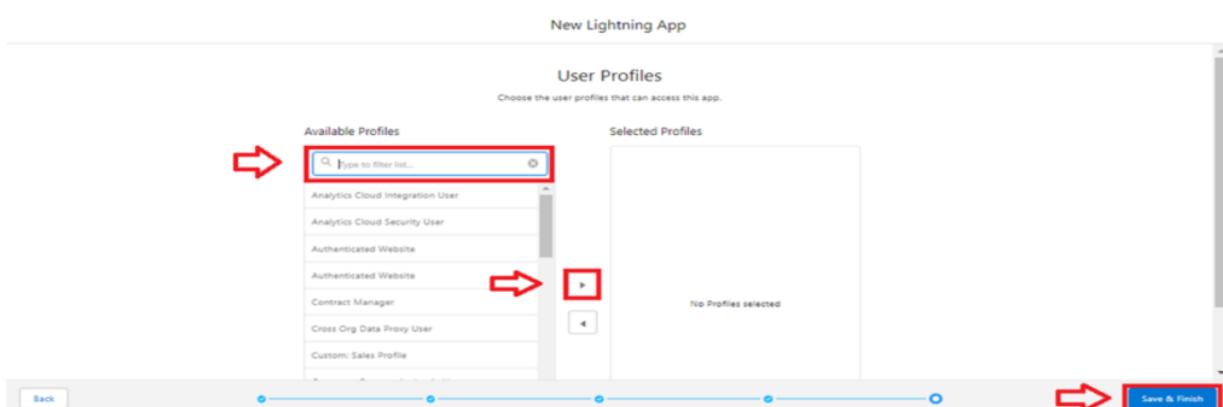


3. To Add Navigation Items:



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

5. To Add User Profiles:



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

Task 5: Creating Profiles :

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

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 and Click Clone.
- For Profile Name, enter Store Supervisor and Click Save.
- While still on the Store Supervisor profile page, then click Edit.
- Scroll down to Custom 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 Colour.

To create a new profile:

1. Go to setup --> type profiles in the quick find box --> click on profiles --> clone the desired profile (standard user is preferred) --> enter profile name --> save.
2. While still on the profile page, then click Edit.

The screenshot shows the Salesforce Setup interface. In the top navigation bar, 'Setup' is selected. The search bar contains 'profi'. Under 'Users', 'Profiles' is selected. A search result for 'Store Supervisor' is shown. The profile details are as follows:

Profile Detail	
Name	Store Supervisor
User License	Salesforce
Description	Custom Profile <input checked="" type="checkbox"/>

Below the profile detail, under 'Object Permissions', there is a list of objects and their permissions. The 'Urban Colour' object has checkboxes for 'Create', 'Read', 'Edit', 'Delete', 'View All', and 'Modify All', all of which are checked. At the bottom of the page, there are tabs for 'Service Provider Access' and 'Tab Settings'.

This screenshot continues from the previous one, focusing on the 'Object Permissions' section of the 'Store Supervisor' profile edit screen. It lists various objects and their permissions. The 'Urban Colour' object is highlighted, showing that 'Create', 'Read', 'Edit', 'Delete', 'View All', and 'Modify All' are checked. Other objects listed include 'Community', 'Content', 'Data Manager', 'Digital Experiences', 'Lightning Usage App', 'LWC Learning (LWC)', 'Marketing', 'Queue Management', 'Rental Management', 'Salesforce Scheduler Setup', 'Sample Console', 'Service', 'Service Console', 'Extended Lightning Service', 'Site.com (Standard)', 'Description Management', 'Vehicle Management', and 'WDC'. The 'Urban Colour' object is also listed under 'Service Provider Access' and 'Tab Settings'.

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

4. Click on Save.

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

Task 6: Setting up Roles :

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

1.Click on the Gear Icon and Click "Setup".

2.In the Quick Find box, enter "Roles" and Click "Roles"

3. Click on "Set Up Roles"

4. Click "Expand All"

5. Under the CEO, click on "Add Role"

6. Fill up the Label as Store Head, Role Name Store_Head.

7. Enter a Role name that will be displayed on Reports.

The screenshot shows the Salesforce Setup interface. In the left sidebar, under 'Users', 'Roles' is selected. On the right, a 'Role Edit' window titled 'New Role' is open. The 'Label' field contains 'Store Head'. The 'Role Name' field contains 'Store_Head'. The 'This role reports to' dropdown is set to 'thesmartbridge.com'. At the bottom, there are 'Save', 'Save & New', and 'Cancel' buttons.

This screenshot shows the same setup process. A second 'Role Edit' window titled 'New Role' is open. The 'Label' field contains 'Billing Operator'. The 'Role Name' field contains 'Billing_Operator'. The 'This role reports to' dropdown is set to 'Store Head'. The interface is identical to the first screenshot, with 'Save', 'Save & New', and 'Cancel' buttons at the bottom.

Your Organization's Role Hierarchy



Task 7 : Creation of an User :

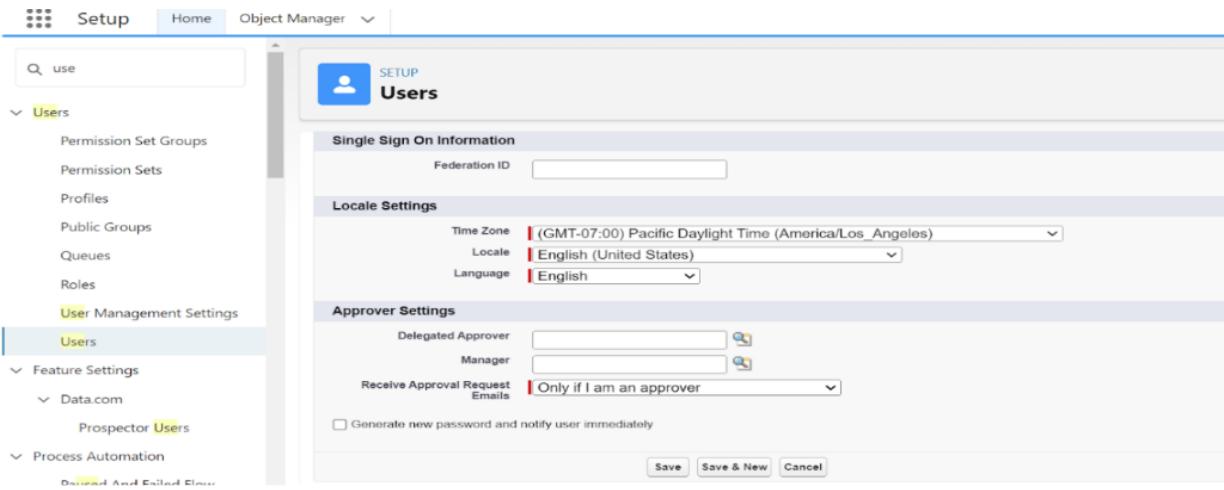
● In Salesforce, a user represents an individual who has access to the Salesforce platform and its functionalities. Each user is assigned a unique username, and their access level and permissions are defined by their profile and role within the organization. Users can perform tasks such as managing records,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

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

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

The screenshot shows the Salesforce Setup interface for creating a new user. The left sidebar navigation bar includes 'Setup', 'Home', and 'Object Manager'. Under 'Users', the 'User Management Settings' section is expanded, showing 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', 'Users' (which is selected), 'Feature Settings', 'Data.com', 'Prospector', and 'Process Automation'. The 'Users' section is further expanded to show 'Paused And Failed Flow'. The main content area is titled 'SETUP Users' and shows the 'User Edit' screen for 'General Information'. The 'General Information' section contains the following fields and values:

- First Name: Amar
- Last Name: K
- Alias: ak
- Email: mailid@gmail.com
- Username: amark2133@salesforce.com
- Nickname: User167161323313747430
- Title: Store Supervisor
- Company: (empty)
- Department: (empty)
- Division: (empty)
- Role: Store Head
- User License: Salesforce
- Profile: Store Supervisor
- Active: checked
- Marketing User: unchecked
- Offline User: unchecked
- Knowledge User: unchecked
- Flow User: unchecked
- Service Cloud User: unchecked
- Site.com Contributor User: unchecked
- Site.com Publisher User: unchecked
- WDC User: unchecked
- Data.com User Type: --None--



Task 8 : Creating/Modifying Records :

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

Steps to Create a Record:

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

Steps to Modify a Record:

- 1. Find the Record:** • Locate the record you want to modify by using the object’s list view, search function, or related lists.
- 2. Open the Record:** • Click on the record’s name to open it and view its details.
- 3. Click “Edit”:** • In the record’s detail view, click the “Edit” button to enable editing mode.
- 4. Update Record Information:** • Make the necessary changes to the fields as required. Ensure all required fields are correctly filled out.
- 5. Save the Changes:** • After making the updates, click “Save” to apply and store the modifications.

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

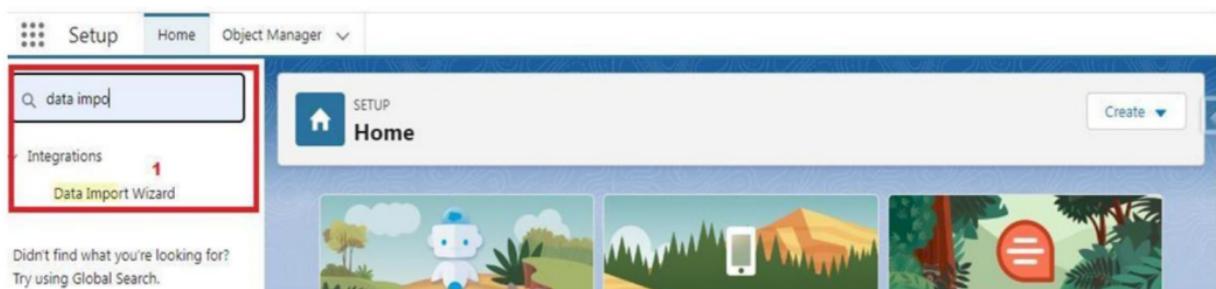
Task 9: Importing Data :

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

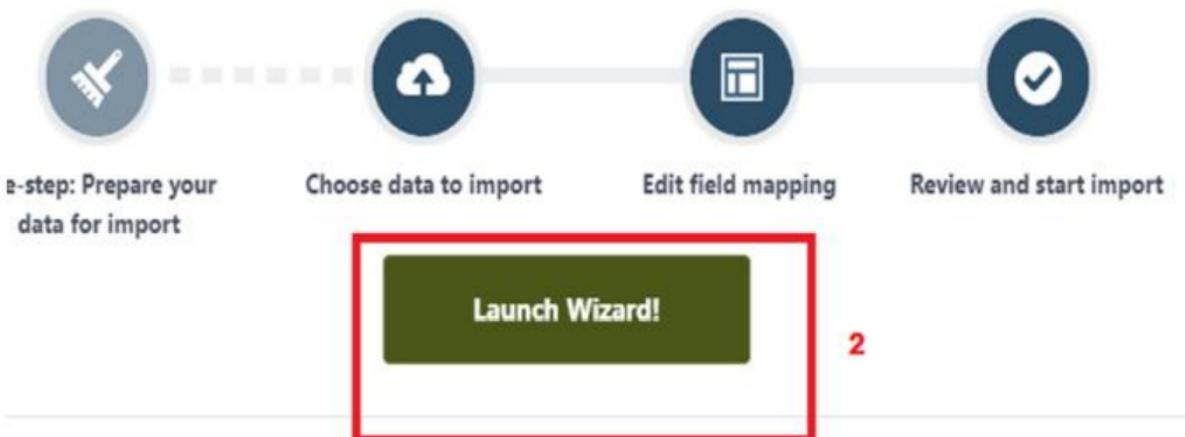
1.

From Setup, click the Home tab.

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



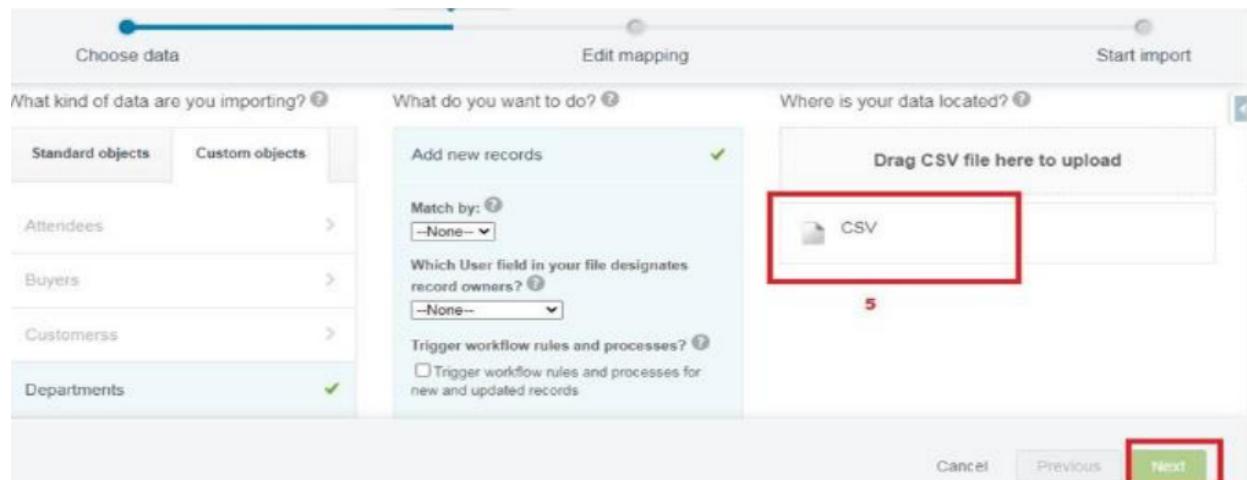
3. Click Launch Wizard!



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

5. Select Add new records.

6. Click CSV and choose file Consultant_CS1 which we made earlier. Click Next.



7. Since the field names in the CSV file (CSV Header) are the same as the field names in your

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

The screenshot shows the 'Edit Field Mapping' step of the import wizard. The 'Mapped Salesforce Object' column is highlighted with a red border. The table lists the following mappings:

Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	Consultant Name	Consultant Name	Divya	Ajith	Shiva
Change	Mobile Number	Mobile Number	884028732	784653673	902039430
Change	Delivery Type	Delivery Type	Self Pickup	Counter	Self Pickup
Change	Address	Address		Hyderabad	
Change	Products	Products	Lipstick	Compact	Facial 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 settings:

- 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)

The 'Start Import' button is highlighted with a red box at the bottom right.

9. Click OK on the popup.

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

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

Note - Do Field mapping carefully.

Task 10 :Accessing Reports :

Creating Report :

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

10.Click on Add Bucket and name it as Cash.

11.Now Click on All Values and select Credit card,Debit card,UPI, and Move to Net Banking. 12.Now Click on All Values again and select Cash and Move to Cash.

13.Click on Apply.

The screenshot shows the Salesforce Setup Home page. On the left, there's a sidebar with various app icons and names. One icon, labeled 'Urban Color', is highlighted with a red box and has a red number '2' positioned above it. The main content area displays three cards: 'Get Started with Einstein Botz', 'Mobile Publisher', and 'Real-time Collaborative Docs'. Below these cards, there's a section titled 'Most Recently Used' showing a list of items with columns for NAME, TYPE, and OBJECT.

This screenshot shows the Salesforce Reports interface. At the top, there's a navigation bar with tabs like 'Urban Color', 'Our Customers', 'Consultants', 'Retailers', 'others', 'Reports', and 'Dashboards'. The 'Reports' tab is highlighted with a red box and has a red number '1' above it. In the center, there's a report titled 'New Consultants Report' for 'Consultants'. The report preview shows a table with columns: Consultant: Consultant Name, Delivery Type, Products, and Payment. To the left, there's a sidebar with sections for 'Fields', 'Groups', and 'Columns'. A red box highlights the 'Columns' section, and a red number '2' is placed above it. At the bottom right of the report preview, there are buttons for 'Save & Run', 'Save', and 'Close'.

This screenshot continues from the previous one, showing the same 'New Consultants Report' interface. The table now includes a fifth column header 'Payment'. A red box highlights the 'Payment' header, and a red number '1' is placed above it. A context menu is open over the 'Payment' column, with a red box highlighting the 'Bucket This Column' checkbox, and a red number '2' is placed above it. Other options in the menu include 'Sort Ascending', 'Sort Descending', 'Group Rows by This Field', 'Show Unique Count', 'Move Left', 'Move Right', and 'Remove Column'.

Edit Bucket Column

* Field * Bucket Name

All Values (4)	Search Values										
Unbucketed Values (4)	<table border="1"><thead><tr><th>VALUE</th><th>BUCKET</th></tr></thead><tbody><tr><td><input type="checkbox"/> Credit Card</td><td></td></tr><tr><td><input type="checkbox"/> Debit Card</td><td></td></tr><tr><td><input type="checkbox"/> Upi</td><td></td></tr><tr><td><input type="checkbox"/> Cash</td><td></td></tr></tbody></table>	VALUE	BUCKET	<input type="checkbox"/> Credit Card		<input type="checkbox"/> Debit Card		<input type="checkbox"/> Upi		<input type="checkbox"/> Cash	
VALUE	BUCKET										
<input type="checkbox"/> Credit Card											
<input type="checkbox"/> Debit Card											
<input type="checkbox"/> Upi											
<input type="checkbox"/> Cash											
<input type="checkbox"/> Bucket remaining values as Other											

Cancel

Edit Bucket Column

* Field * Bucket Name

All Values (4)	Search Values										
<input style="border: 2px solid blue; width: 150px; height: 20px; vertical-align: middle;" type="text" value="Bucket Name"/> 2	<table border="1"><thead><tr><th>VALUE</th><th>BUCKET</th></tr></thead><tbody><tr><td><input type="checkbox"/> Credit Card</td><td></td></tr><tr><td><input type="checkbox"/> Debit Card</td><td></td></tr><tr><td><input type="checkbox"/> Upi</td><td></td></tr><tr><td><input type="checkbox"/> Cash</td><td></td></tr></tbody></table>	VALUE	BUCKET	<input type="checkbox"/> Credit Card		<input type="checkbox"/> Debit Card		<input type="checkbox"/> Upi		<input type="checkbox"/> Cash	
VALUE	BUCKET										
<input type="checkbox"/> Credit Card											
<input type="checkbox"/> Debit Card											
<input type="checkbox"/> Upi											
<input type="checkbox"/> Cash											
<input type="checkbox"/> Bucket remaining values as Other											

1 Cancel

Edit Bucket Column

* Field * Bucket Name

All Values (4)	Search Values
<input type="checkbox"/> Net Banking (0)	<input type="checkbox"/> VALUE BUCKET
<input type="checkbox"/> Cash (0)	<input type="checkbox"/> Credit Card
	<input type="checkbox"/> Debit Card
	<input type="checkbox"/> Upi
	<input type="checkbox"/> Cash

Unbucketed Values (4)

Bucket remaining values as Other

Add Bucket Cancel

Edit Bucket Column

* Field * Bucket Name

All Values (4)	Search Values
<input type="checkbox"/> Net Banking (3)	<input type="checkbox"/> VALUE BUCKET
<input type="checkbox"/> Cash (0)	<input type="checkbox"/> Credit Card Net Banking
	<input type="checkbox"/> Debit Card Net Banking
	<input type="checkbox"/> Upi Net Banking
	<input checked="" type="checkbox"/> Cash Cash

Unbucketed Values (1)

Bucket remaining values as Other

Add Bucket Cancel

Edit Bucket Column

* Field * Bucket Name

All Values (4)	Search Values
<input type="checkbox"/> Net Banking (0)	<input type="checkbox"/> VALUE BUCKET
<input type="checkbox"/> Cash (0)	<input checked="" type="checkbox"/> Credit Card
	<input checked="" type="checkbox"/> Debit Card
	<input checked="" type="checkbox"/> Upi
	<input type="checkbox"/> Cash

Unbucketed Values (4)

Bucket remaining values as Other

Add Bucket

Edit Bucket Column

* Field
Payment

* Bucket Name
Payment type

All Values (4)		Search Values
	VALUE	BUCKET
<input type="checkbox"/> Net Banking (3)	Credit Card	Net Banking
<input type="checkbox"/> Cash (0)	Debit Card	Net Banking
<input type="checkbox"/> Unbucketed Values (1)	Upi	Net Banking
	<input checked="" type="checkbox"/> Cash	

Bucket remaining values as Other

Add Bucket

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

15. Click refresh, Save, and Run.

16. Give the report name – Consultant report.

17. Click Save.

Fields >

Outline Filters

Groups

- GROUP ROWS
- Payment type

GROUP COLUMNS

- Add group...

Columns

- Consultant: Consultant Name
- Delivery Type
- Products
- Payment

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

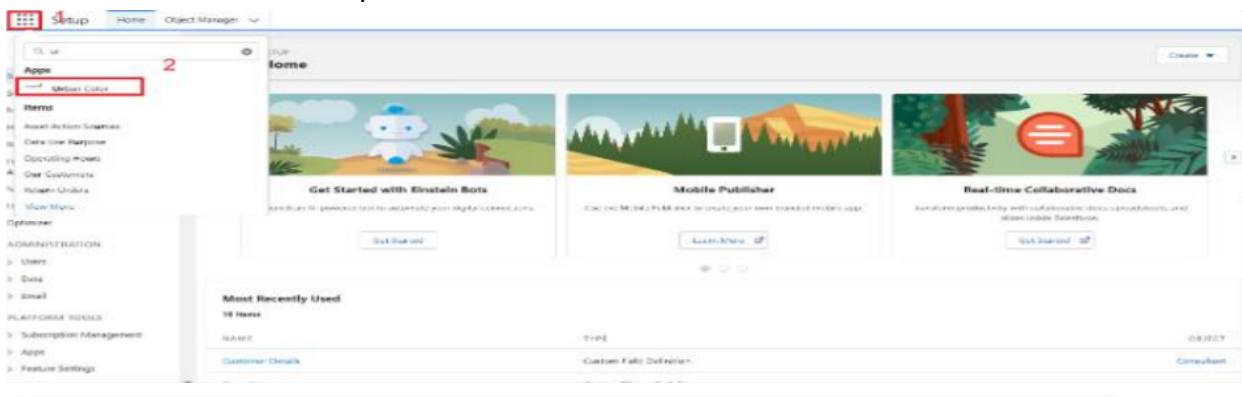
Payment type	Consultant: Consultant Name	Delivery Type	Products	Payment
Net Banking (7)	Ajith	Courier	Compact	Upi
	Babu	Self Pickup	Face Pack	Credit Card
	Chitra	Courier	Eye Liner	Debit Card
	Swathi	Courier	Nail Polish	Upi
	Prasad	Self Pickup	Eye Liner	Upi
	Ajay Kumar	Courier	Lip Balm	Debit Card
	Sandeep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

Save Report

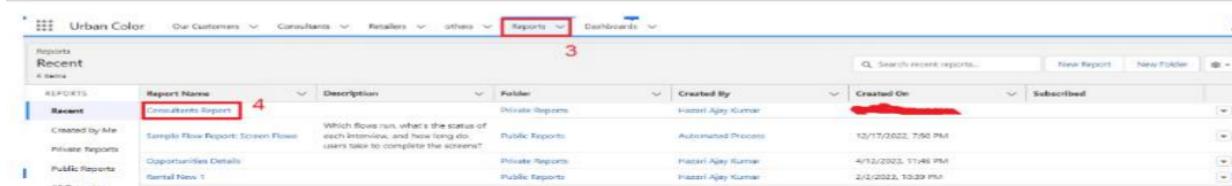
Report Name Consultants Report	1
Report Unique Name Consultants_Report_Info	
Report Description	
Folder Private Reports	2
<input type="button" value="Select Folder"/> <input type="button" value="Cancel"/> <input style="background-color: red; color: white; border: 2px solid red;" type="button" value="Save"/>	

View Reports :

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



The screenshot shows the Salesforce App Launcher interface. On the left, there's a sidebar with various categories like 'Setup', 'Home', 'Object Manager', 'Apps', 'Items', 'Administration', 'Platform Tools', and 'Subscription Management'. The 'Apps' section is expanded, and 'Urban Color' is selected, highlighted with a red box and labeled '2'. To the right, there are three main cards: 'Get Started with Einstein Bots', 'Mobile Publisher', and 'Real-time Collaborative Docs'. Below these cards, there's a section titled 'Most Recently Used' with a table showing 'Customer Details' and 'Customer Field Definition'.



The screenshot shows the 'Reports' tab in the Urban Color application. At the top, there are tabs for 'Reports', 'Recent', and 'New'. Below that is a search bar and buttons for 'New Report' and 'New Folder'. The main area displays a table of reports with columns: 'Report Name', 'Description', 'Folder', 'Created By', 'Created On', and 'Subscribed'. One report is highlighted with a red box and labeled '4'. The table shows three rows: 'Consultants Report' (Public Reports, Created by Hosted Apay Kumar, Created on 12/17/2022, 7:50 PM), 'Sample Flow Report: Screen Flow' (Public Reports, Automated Process, Created on 12/17/2022, 7:50 PM), and 'Opportunities Details' (Private Reports, Hosted Apay Kumar, Created on 4/12/2023, 11:46 PM).

Task 11 : Working with dashboards :

Create Dashboard :

1. Click on the Dashboards tab from the Urban Colour 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 visualisation, select any of the chart, table, etc. as per your choice/requirement.
8. Click add and Click save.

The screenshot shows the 'Dashboards' section of a software interface. At the top, there's a navigation bar with links like 'Urban Color', 'Our Customers', 'Consultants', 'Retailers', 'others', 'Reports', and 'Dashboards'. Below this is a search bar labeled 'Search recent dashboards...' and a red box highlights the 'New Dashboard' button. A table below lists 'DASHBOARDS' with columns for 'Dashboard Name', 'Description', 'Folder', 'Created By', 'Created On', and 'Subscribed'. A red number '1' is placed above the 'Dashboards' dropdown.

New Dashboard

* Name 3
Consultant Dashboard

Description

Folder
Private Dashboards Select Folder 4

Cancel Create

The screenshot shows the 'Consultant Dashboard' page. At the top, there's a navigation bar with links like 'Urban Color', 'Our Customers', 'Consultants', 'Retailers', 'others', 'Reports', and 'Dashboards'. Below this is a toolbar with various icons. A red box highlights the '+ Component' button. A red number '5' is placed above the toolbar.

The screenshot shows a 'Select Report' dialog box. On the left, there's a sidebar with 'Reports' (Recent, Created by Me, Private Reports, Public Reports, All Reports) and 'Folders' (Created by Me, Shared with Me, All Folders). The main area shows a list of reports. A red box highlights the 'Consultants Report' entry. A red number '6' is placed next to the report entry. At the bottom right of the dialog box is a 'Select' button, which is also highlighted with a red box. A red number '7' is placed above the 'Select' button.

Add Component

Report
Consultants Report

Use chart settings from report i

Display As 7

Payment type

X-Axis
Record Count

Preview

Consultants Report

Record Count

Payment type	Record Count
Net Banking	7
Cash	2

[View Report \(Consultants Report\)](#)

8 Cancel Add

Urban Color Our Customers Consultants ▼ Retailers ▼ others ▼ Reports ▼ Dashboards ▼

Consultant Dashboard 9

Consultants Report

Record Count

Payment type	Record Count
Net Banking	7
Cash	2

[View Report \(Consultants Report\)](#)

+ Component + Filter Save Done

View Dashboard :

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

The image consists of two vertically stacked screenshots of the Salesforce interface.

Screenshot 1 (Top): This screenshot shows the Salesforce Home page. A red box highlights the 'Urban Color' app icon in the 'Recent' section of the App Launcher. Another red box highlights the 'Dashboards' tab in the top navigation bar.

Screenshot 2 (Bottom): This screenshot shows the 'Dashboards' page. A red box highlights the 'Consultant Dashboard' in the 'Recent' section of the sidebar. Another red box highlights the 'Consultant Dashboard' entry in the main table.

Table Data (Screenshot 2):

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