URBANCOLORMANAGEMENTSYSTEM

EmpoweringColorfulCities

Developedby:

Vasim Subahani Shaik

214G1A32B7@srit.ac.in

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 becomeacomplextask.Thissystem providesacomprehensivesolutionforcityplanners,architects,andurbandevelopersto maintain and update color schemes effectively.

The system offers features like color palette management, project tracking, and stakeholdercommunication,allwithinanintuitiveinterface.Byintegratingwithexisting 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 creationofvisually appealing cities that reflect a harmonious blend of tradition and modernity.

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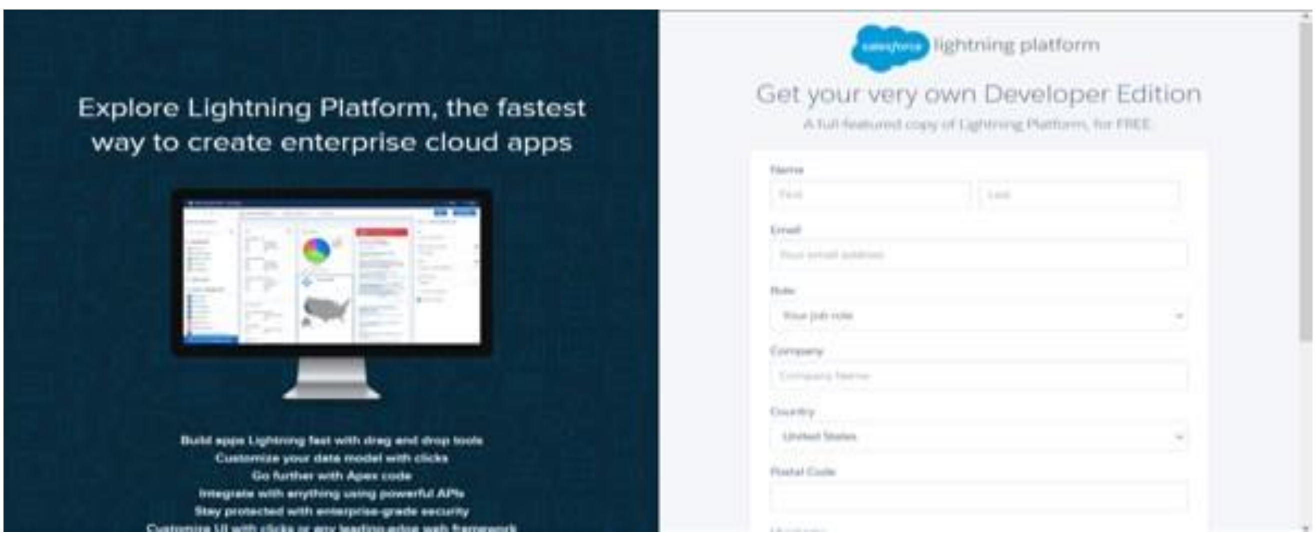
1. Creating a DeveloperAccount inSalesforce

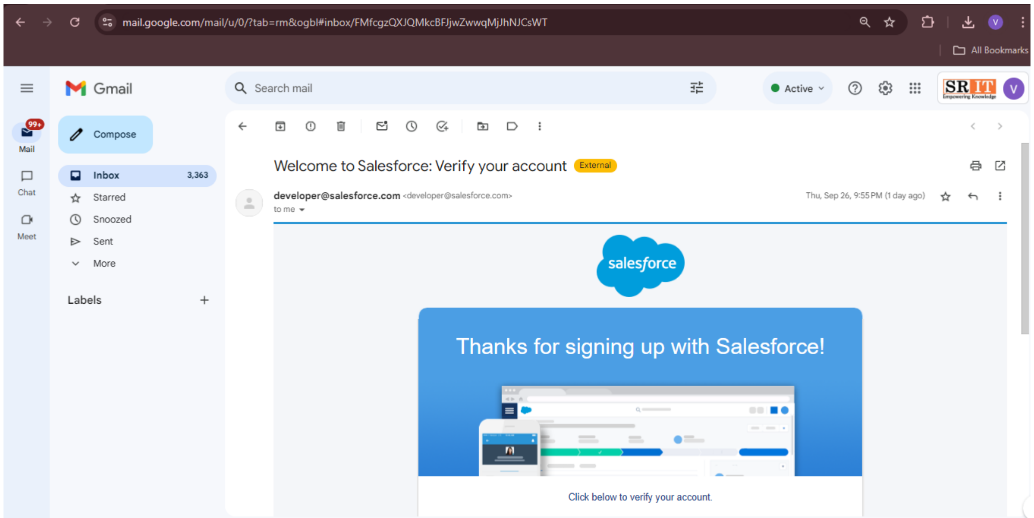
Step1:SignUpforaDeveloperOrg

1. **Go to**developers.salesforce.com/signup.
2. **Clickon**"SignUp."
3. **FillouttheSign-UpForm**withthefollowingdetails:
    - **FirstName&LastName**
    - **Email**
    - **Role**:Developer
    - **Company**:[YourCollege Name]
    - **Country**:India
    - **PostalCode**:[YourPinCode]
    - **Username**:Createausernameusingacombinationofyournameandcompany. This does not need to be a valid email; you can format it as `username@organization.com`.
4. **Clickon"SignUp"**afterfillinginallthedetails.



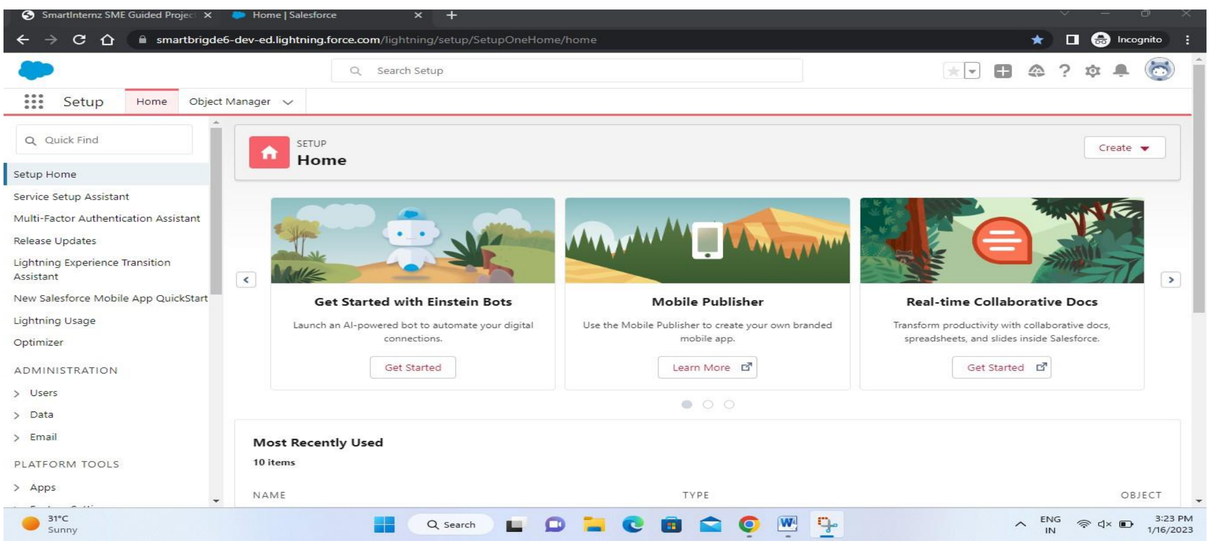
Step2:Account Activation

1. **Gotoyouremailinbox**thatyouusedforsigningup.
2. **Findtheverificationemail**fromSalesforceandclickonthe"VerifyAccount"linkto activate your account.
    - *Note*:Theemailmighttake5-10minutestoarrive.



Step3:LogintoYourSalesforceAccount

1. **Go to**login.salesforce.com.
2. **Enteryourusernameandpassword**createdduringthesign-upprocess.
3. **Login**toaccessyourSalesforceDeveloperaccount.
    - Youwillseethehomepageafterloggingin.



2. Salesforce Objects

Salesforceobjectsaredatabasetablesthatallowyoutostoredataspecifictoanorganization. Objects in Salesforce are of two types:

1. **StandardObjects**:Thesearethepre-builtobjectsprovidedbySalesforce,suchasUsers, Contracts, Reports, Dashboards, and more. Standard objects form the foundation of Salesforce's data structure and cover common business scenarios.
2. **CustomObjects**:Theseareuser-definedobjectscreatedtostoredatathatisuniqueto yourorganization’sneeds.InthecontextoftheUrbanColorManagementSystem, examplesofcustomobjectsinclude**OurCustomers**,**Consultants**,**Retailers**,and**Others**.

2.1. CreatingObjectsforUrbanColorManagement

In the Urban Color Management System, we need to create three custom objects: **Our Customers**,**Consultants**,**Retailers**,and**Others**.Thefollowingstepswillguideyouthroughthe process of creating these objects in Salesforce.

Step1:AccessSetup

1. **Clickonthegearicon**intheupper-rightcornerofSalesforce.
2. **Select"Setup"**fromthedropdownmenu.

Step2:OpenObjectManager

1. **Clickonthe"ObjectManager"**tablocatednexttotheHometab.

Step3:CreateaCustom Object

1. Onthe**ObjectManager**page,looktotherightsideofthescreen.
2. **Clickonthe"Create"dropdown**andselect**CustomObject**.

Step4:Create"OurCustomer"Object

1. Onthe**CustomObjectDefinition**page,enterthefollowingdetails:
    - **Label**:OurCustomer
    - **PluralLabel**:OurCustomers

- **RecordName**:OurCustomer

2. **Checkthefollowingboxes**:
    - **AllowReports**
    - **AllowSearch**
3. **Click"Save"**tocreatetheobject.

Step5:CreateaCustomTabfor"OurCustomer"

1. **Clickthe"Home"tab**andenter"Tabs"intheQuickFindsearchbar.
2. **Select"Tabs"**fromthesearchresults.
3. Under**CustomObjectTabs**,click**New**.
4. For**Object**,select**OurCustomer**.
5. For**TabStyle**,selectanyiconthatrepresentsyourobject.
6. Leaveallothersettingsasdefaultsandclick**Next**.
7. **Click"Next"**again,then**Save**.

2.2. CreatingtheConsultantsObject

Thefollowingstepswillguideyouthroughtheprocessofcreatingthe**Consultants**objectin Salesforce.

Step1:AccessSetup

1. **Clickonthegearicon**intheupper-rightcornerofSalesforce.
2. **Select"Setup"**fromthedropdownmenu.

Step2:OpenObjectManager

1. **Clickonthe"ObjectManager"**tablocatednexttotheHometab.

Step3:CreateaCustom Object

1. Onthe**ObjectManager**page,looktotherightsideofthescreen.
2. **Clickonthe"Create"dropdown**andselect**CustomObject**.

Step4:Create"Consultants"Object

1. Onthe**CustomObjectDefinition**page,enterthefollowingdetails:
   - **Label**:Consultant
   - **PluralLabel**:Consultants
   - **RecordName**:Consultant
2. **Checkthefollowingboxes**:
   - **AllowReports**
   - **AllowSearch**
3. **Click"Save"**tocreatetheobject.

Step5:CreateaCustomTabfor"Consultants"

1. **Clickthe"Home"tab**andenter"Tabs"intheQuickFindsearchbar.
2. **Select"Tabs"**fromthesearchresults.
3. Under**CustomObjectTabs**,click**New**.
4. For**Object**,select**Consultants**.
5. For**TabStyle**,selectanyiconthatrepresentsyourobject.
6. Leaveallothersettingsasdefaultsandclick**Next**.
7. **Click"Next"**again,then**Save**.

2.3. CreatingtheRetailersObject

Thefollowingstepswillguideyouthroughtheprocessofcreatingthe**Retailers**objectin Salesforce.

Step1:AccessSetup

1. **Clickonthegearicon**intheupper-rightcornerofSalesforce.
2. **Select"Setup"**fromthedropdownmenu.

Step2:OpenObjectManager

1. **Clickonthe"ObjectManager"**tablocatednexttotheHometab.

Step3:CreateaCustom Object

1. Onthe**ObjectManager**page,looktotherightsideofthescreen.
2. **Clickonthe"Create"dropdown**andselect**CustomObject**.

Step4:Create"Retailers"Object

1. Onthe**CustomObjectDefinition**page,enterthefollowingdetails:
    - **Label**:Retailer
    - **PluralLabel**:Retailers
    - **RecordName**:Retailer
2. **Checkthefollowingboxes**:
    - **AllowReports**
    - **AllowSearch**
3. **Click"Save"**tocreatetheobject.

Step5:CreateaCustomTabfor"Retailers"

1. **Clickthe"Home"tab**andenter"Tabs"intheQuickFindsearchbar.
2. **Select"Tabs"**fromthesearchresults.
3. Under**CustomObjectTabs**,click**New**.
4. For**Object**,select**Retailers**.
5. For**TabStyle**,selectanyiconthatrepresentsyourobject.

6. Leaveallothersettingsasdefaultsandclick**Next**.
7. **Click"Next"**again,then**Save**.

2.4. CreatingtheOthersObject

Thefollowingstepswillguideyouthroughtheprocessofcreatingthe**Others**objectin Salesforce.

Step1:AccessSetup

1. **Clickonthegearicon**intheupper-rightcornerofSalesforce.
2. **Select"Setup"**fromthedropdownmenu.

Step2:OpenObjectManager

1. **Clickonthe"ObjectManager"**tablocatednexttotheHometab.

Step3:CreateaCustom Object

1. Onthe**ObjectManager**page,looktotherightsideofthescreen.
2. **Clickonthe"Create"dropdown**andselect**CustomObject**.

Step4:Create"Others"Object

1. Onthe**CustomObjectDefinition**page,enterthefollowingdetails:
   - **Label**:Other
   - **PluralLabel**:Others
   - **RecordName**: Other
2. **Checkthefollowingboxes**:
   - **AllowReports**
   - **AllowSearch**
3. **Click"Save"**tocreatetheobject.

Step5:CreateaCustomTabfor"Others"

1. **Clickthe"Home"tab**andenter"Tabs"intheQuickFindsearchbar.
2. **Select"Tabs"**fromthesearchresults.

3. Under**CustomObjectTabs**,click**New**.
4. For**Object**,select**Others**.
5. For**TabStyle**,selectanyiconthatrepresentsyourobject.
6. Leaveallothersettingsasdefaultsandclick**Next**.
7. **Click"Next"**again,then**Save**.

3. FieldsandRelationships

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.

Byusingrelationships,Salesforceensuresthatallrelateddataisinterconnected,making it easier for users to navigate between related records, improving data consistency, and enhancing the overall user experience.

3.1. Fieldsinthe"OurCustomers"Object

Thefollowingfieldsaredefinedinthe"OurCustomers"object,eachwitha 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. FieldsinConsultantsobjects

Thefollowingfieldsaredefinedinthe"Consultants"object,eachwithaspecificdata 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 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

3.3. FieldsinRetailersobjects

Thefollowingfieldsaredefinedinthe"Retailers"object,eachwithaspecificdata 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. FieldsinOthersobjects

Thefollowingfieldsaredefinedinthe"Others"object,eachwithaspecificdata type:

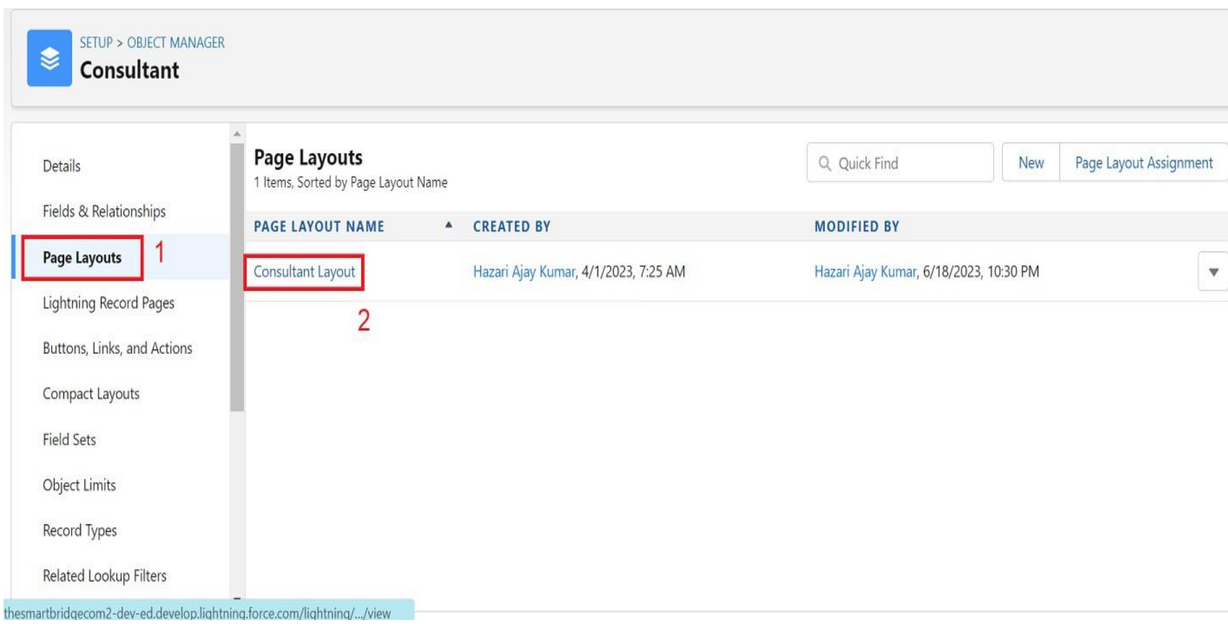
S No	Field Label	Data Type
1	Name	Text
2	Employee 1)Company Employee 2)Staff 3)Special Reference	Picklist
3	Coupon	Text
4	Products 1)Lipstick 2)Compact 3)EyeLiner 4)FacePack 5)Lip Balm 6)Nail Polish	Multi-Picklist

4. PageLayouts

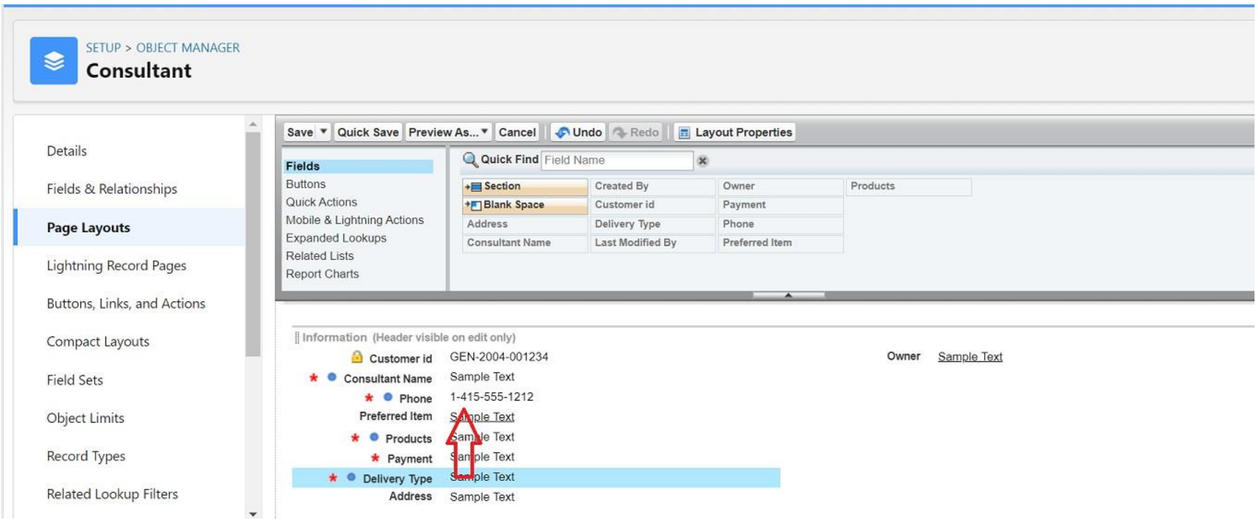
InSalesforce,pagelayoutsdefinetheorganizationandarrangementoffields,buttons, relatedlists,andothercomponentsonanobject'sdetailandeditpages.Theyallowyouto controltheuserinterfaceandtailorittomeetthespecificneedsofyourorganization.

PageLayoutCreation

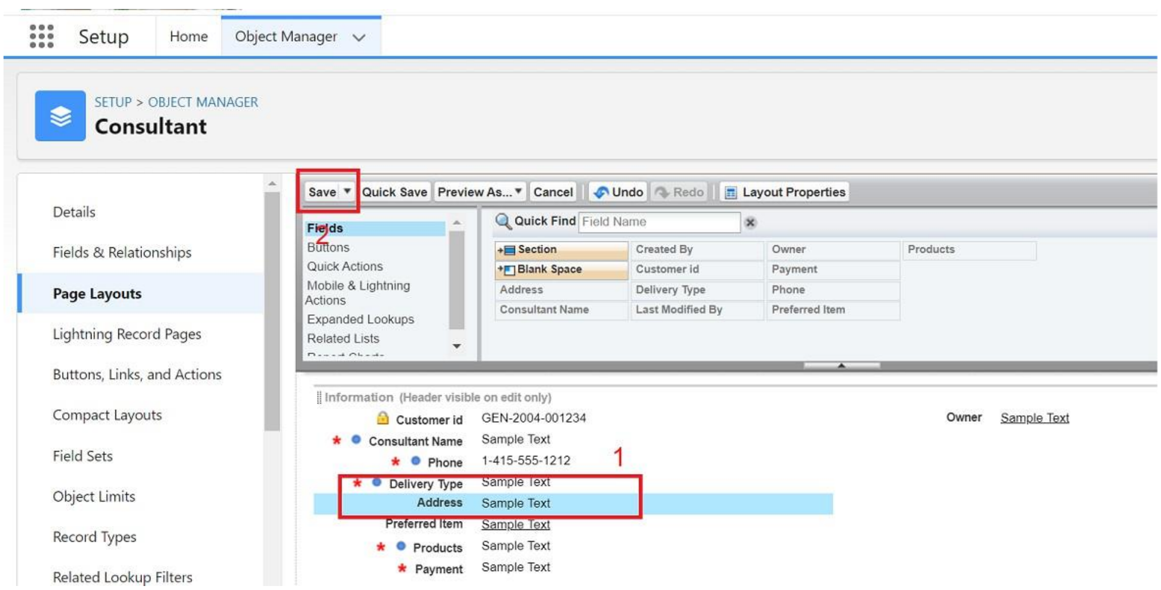
1. FromtheSalesforcesetupmenu,goto**"ObjectManager"**andselectthe**Consultants** object.
2. Clickon**"PageLayouts"**intheleftsidebar.Thiswilldisplayalistofavailablepage layouts for the selected object.
3. Selectthe **ConsultantLayout** pagelayout



4. Clickanddragthe**DeliveryType**and**Address**fieldsbelowthe**Phone**field.



5. ClickonSave.



5. TheLightningApp

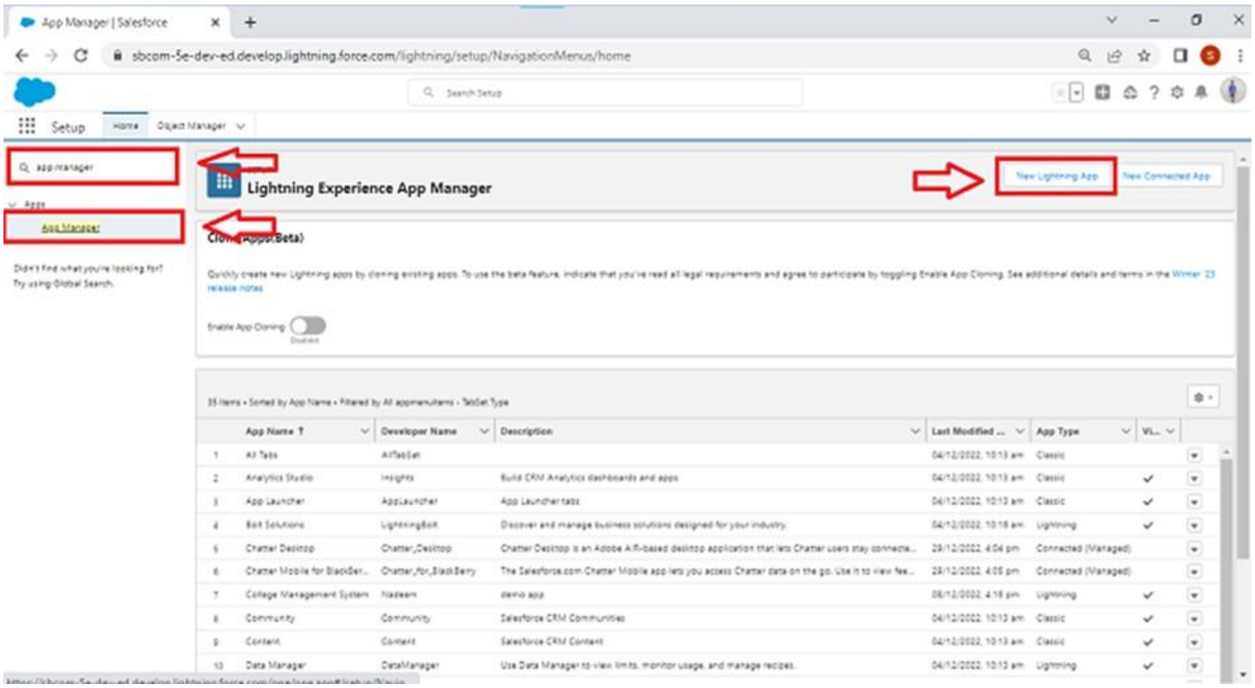
An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

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. CreateaLightningApp

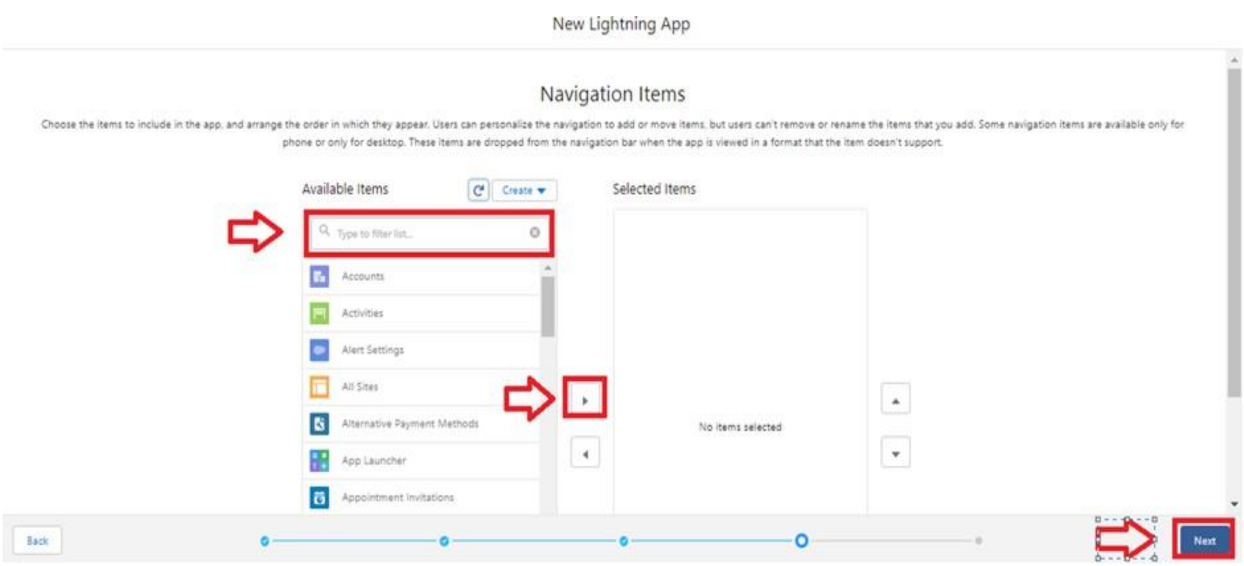
TocreateaLightningapppage:

1. Gotothe**Setup**page.
2. Inthe**QuickFind**searchbar,type**“AppManager”**andselect**“AppManager.”**
3. Clickon**NewLightningApp**.
    - Filltheappnameas**UrbanColor**in**AppDetailsandBranding**.
    - Click**Next**.
    - Onthe**AppOptions**page,keepthesettingsasdefault.
    - Click**Next**.
    - Onthe**UtilityItems**page,keepthesettingsasdefault.
    - Click**Next**.



ToAddNavigationItems:

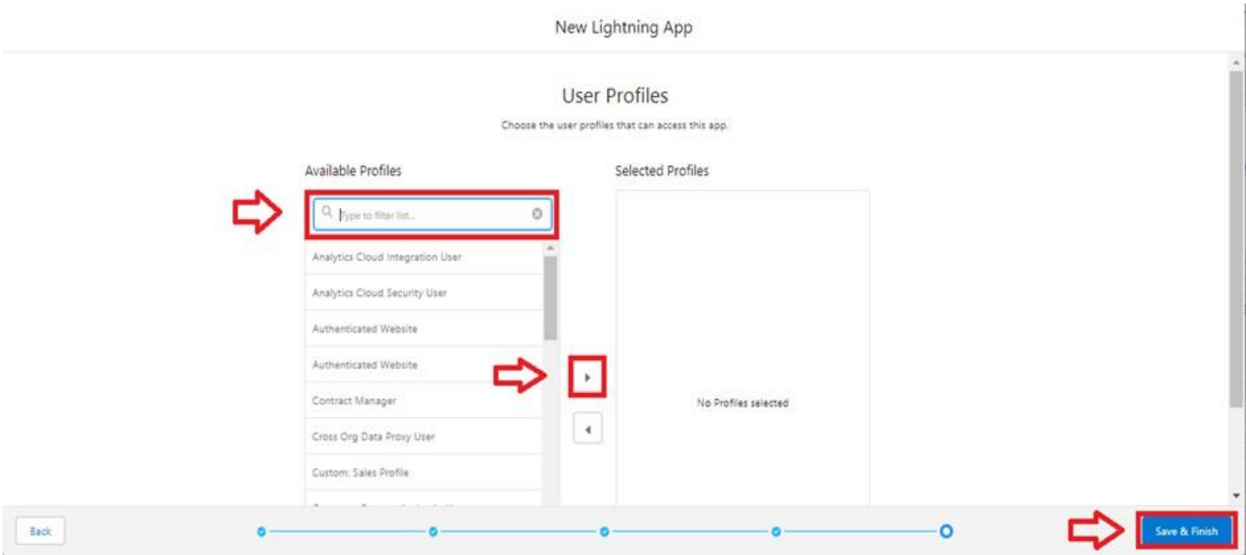
1. Selecttheitems**(OurCustomers,Consultants,Retailers,Others,Reports,Dashboards)** fromthesearchbarandmovethemusingthearrowbutton.
2. Click**Next**.



ToAddUserProfiles:

1. Searchfor**profiles(SystemAdministrator)**inthesearchbar.

2. Clickonthearrowbuttontoaddtheprofile.
3. Click**Save&Finish**.



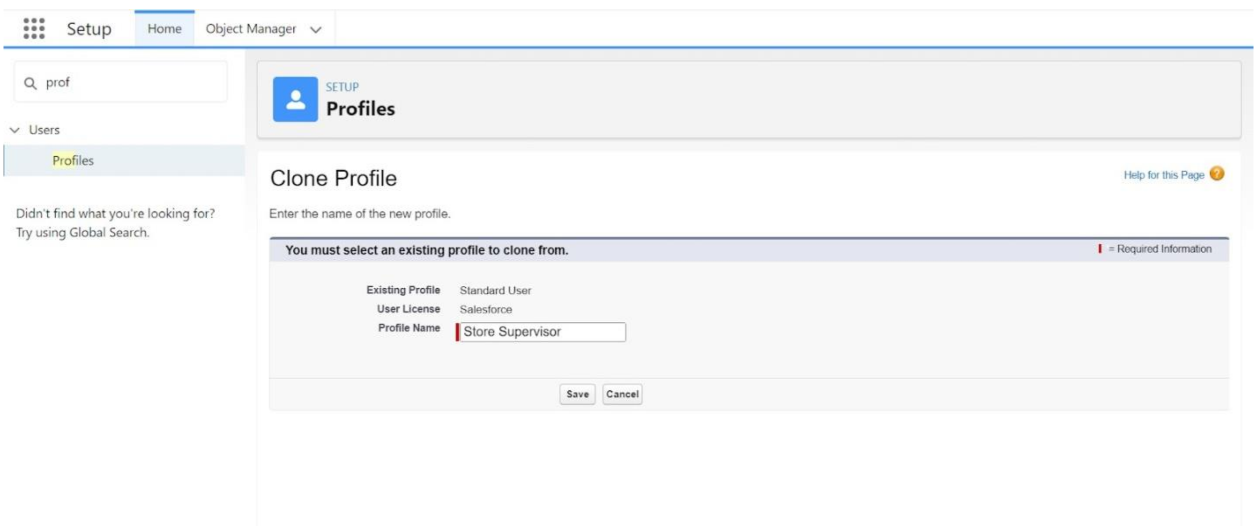
6. Profile

Aprofileisagroup/collectionofsettingsandpermissionsthatdefinewhata usercandoinsalesforce.Aprofilecontrols“Objectpermissions,Fieldpermissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges.

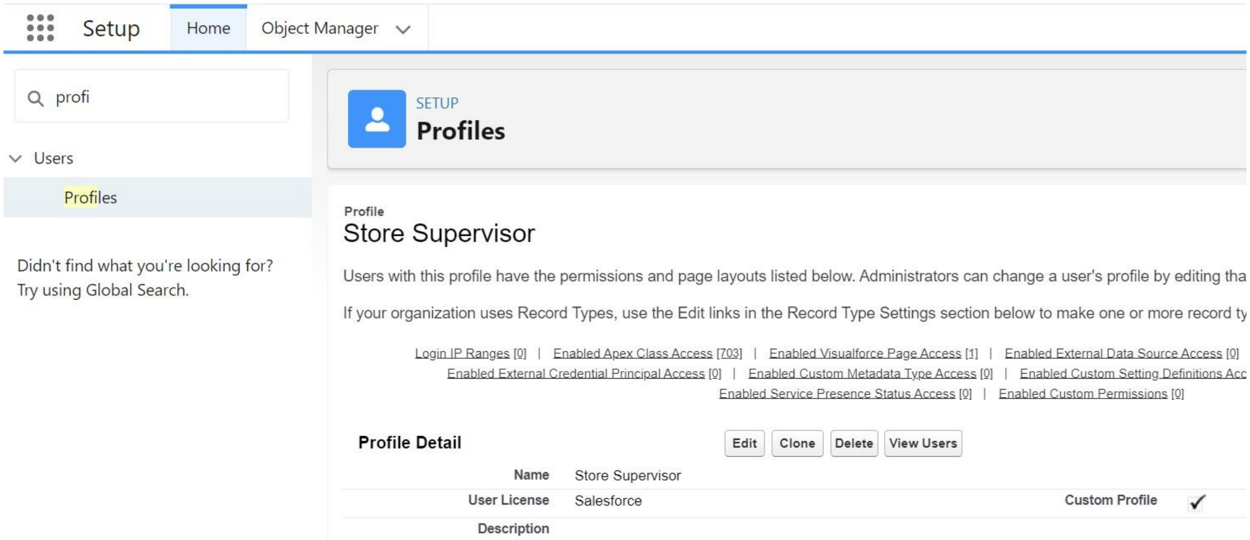
6.1. CreatingaProfile

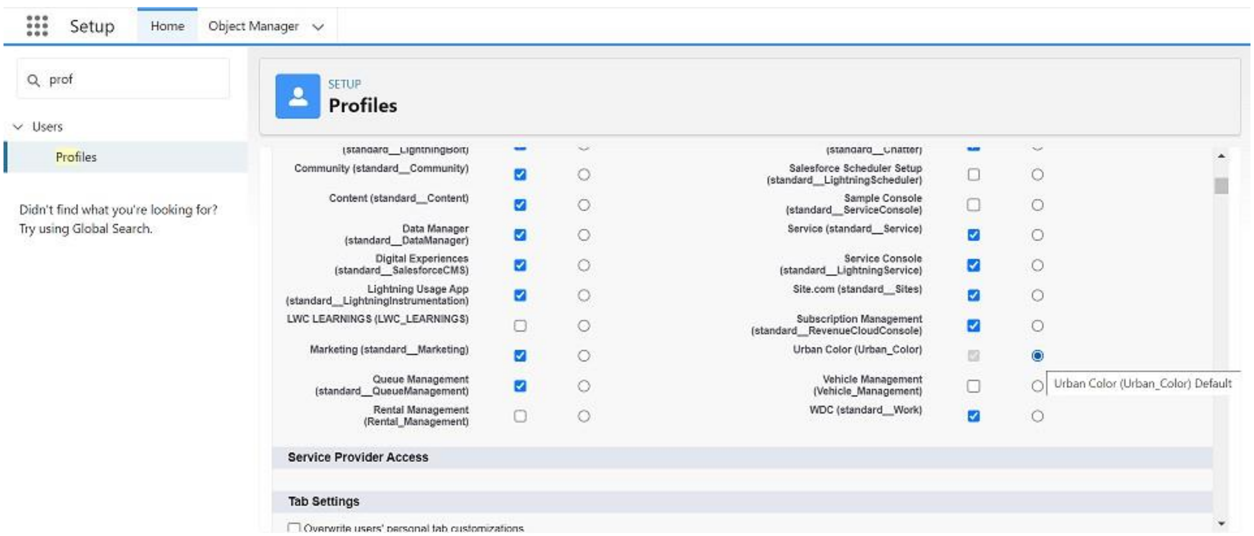
CreatingaStoreSupervisorProfileandSettingObjectPermissions:

1. From**Setup**,enter**Profiles**inthe**QuickFind**box,andselect**Profiles**.
2. Fromthelistofprofiles,find**StandardUser**.
3. Click**Clone**.
4. For**ProfileName**,enter**StoreSupervisor**.
5. Click**Save**.



6. Whilestillonthe**StoreSupervisor**profilepage,click**Edit**.
7. Scroll down to **Custom Object Permissions** and give access for **Create, Read, Edit, Delete,ViewAll,andModifyAll**forthe**OurCustomers,Consultants,Retailers,Others** objects.

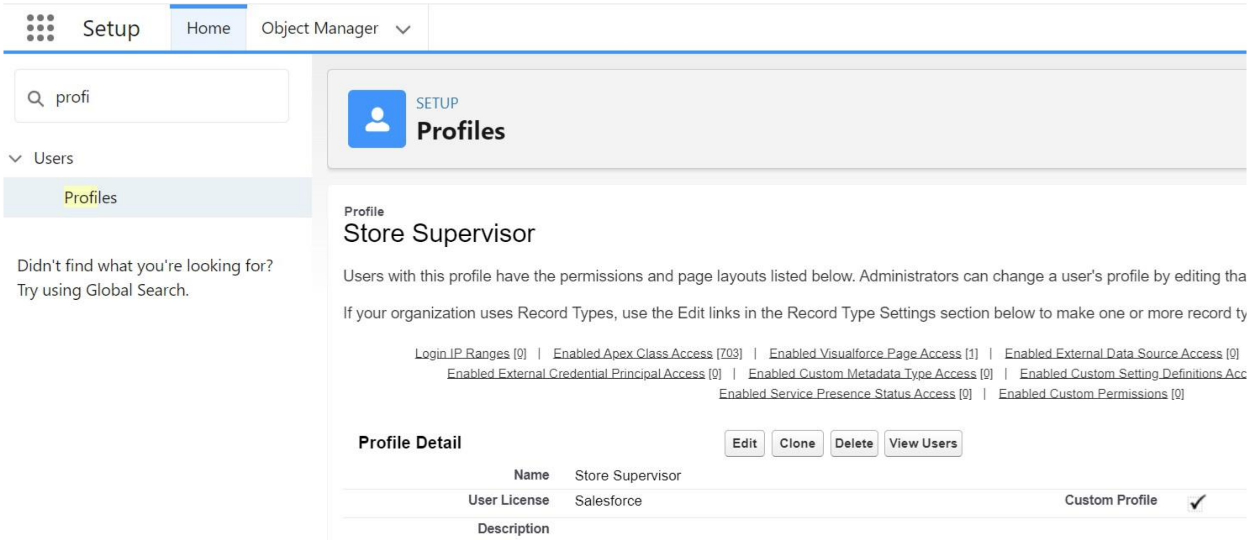




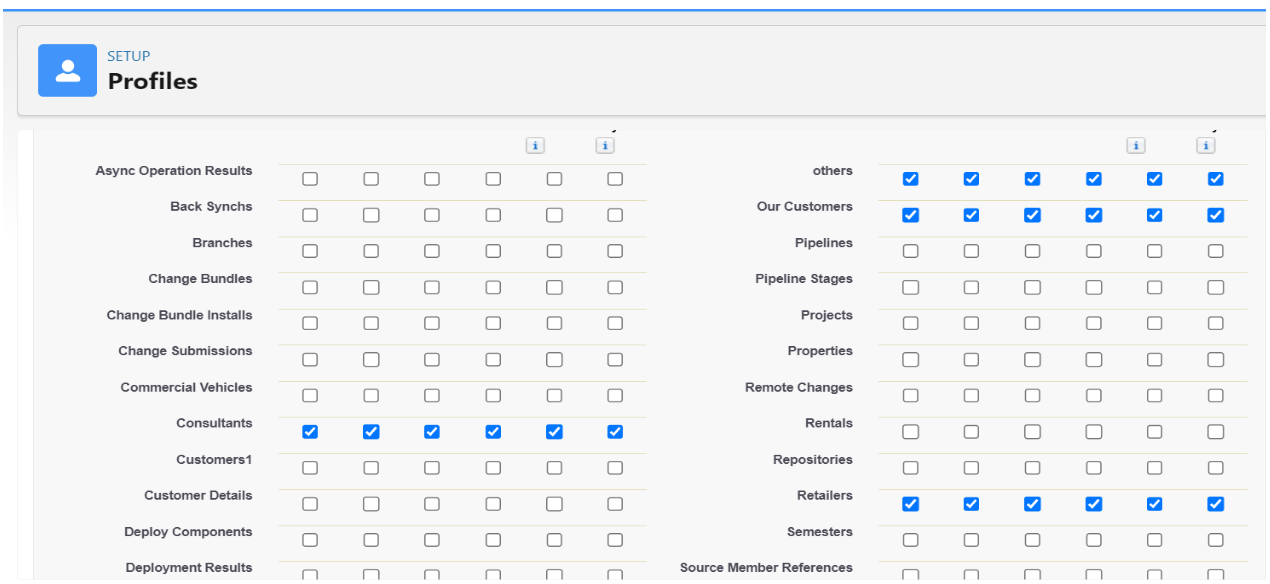
8. ScrolldowntoCustomAppSettingsandgiveaccesstoUrbanColor.
9. ClickonSave.

ToCreateaNewProfile:

1. GotoSetup.
2. TypeProfilesintheQuickFindbox.
3. ClickonProfiles.
4. Clonethedesiredprofile(StandardUserispreferable).
5. EntertheProfileName.
6. ClickSave.
7. Whilestillontheprofilepage,clickEdit.

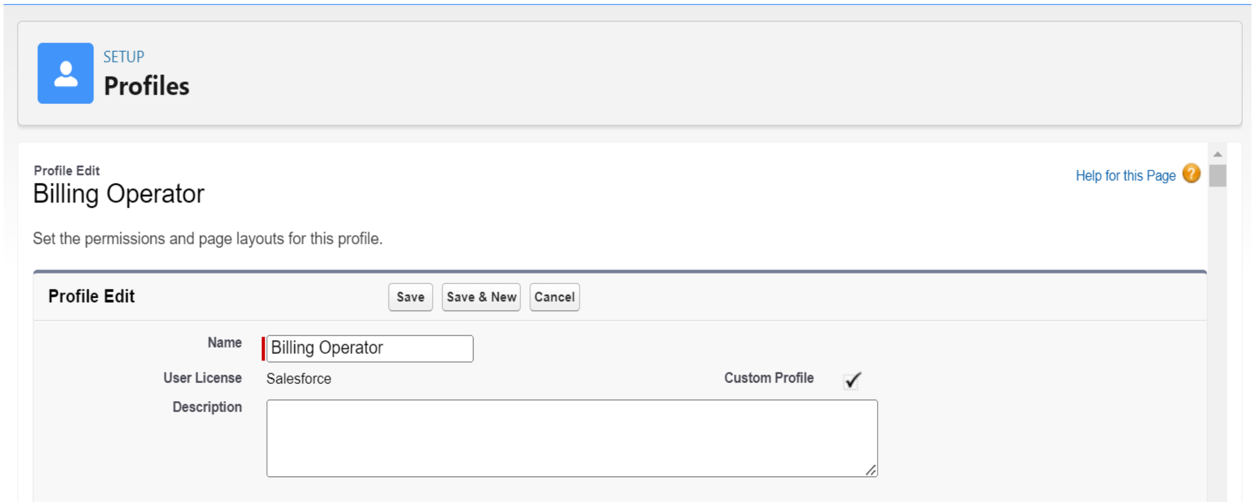


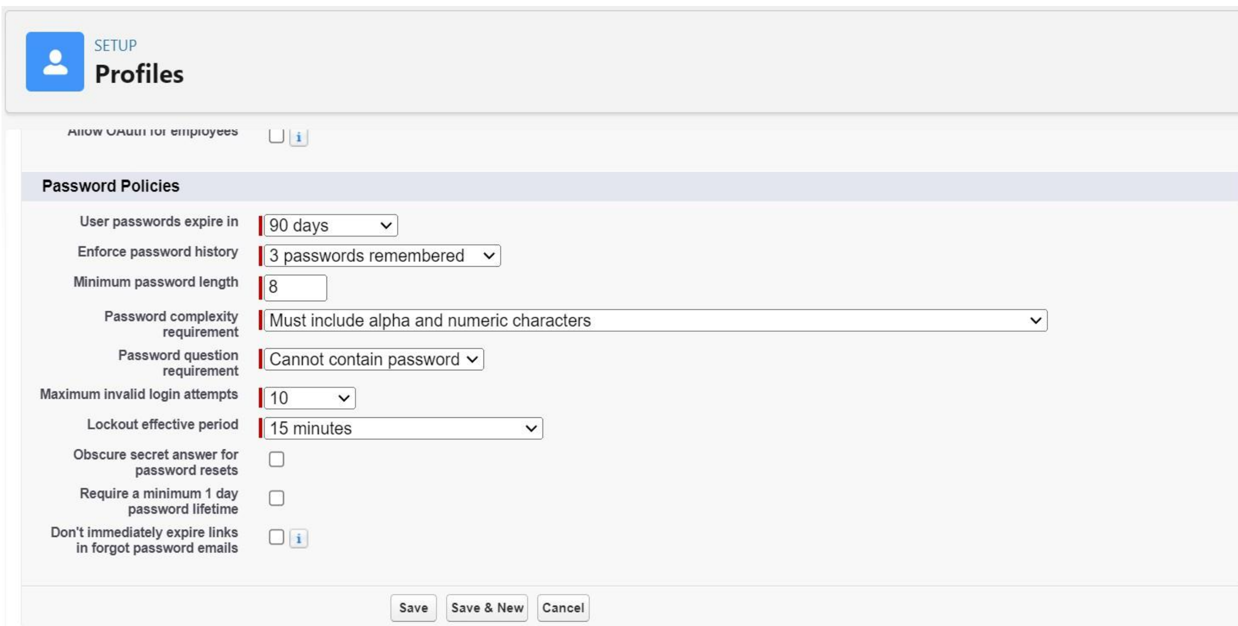
8. Scrolldowntothe**CustomObjectPermissions**andgiveallaccesstothe**Consultants, Others, Our Customers, Retailers** objects.
9. Clickon**Save**.



Similarly,CreateanOperatorProfile:

1. Clonethe**SalesforcePlatform**userprofile.
2. Giveaccessonlyfor**BillingOperator**.





3. Clickon**Save**.

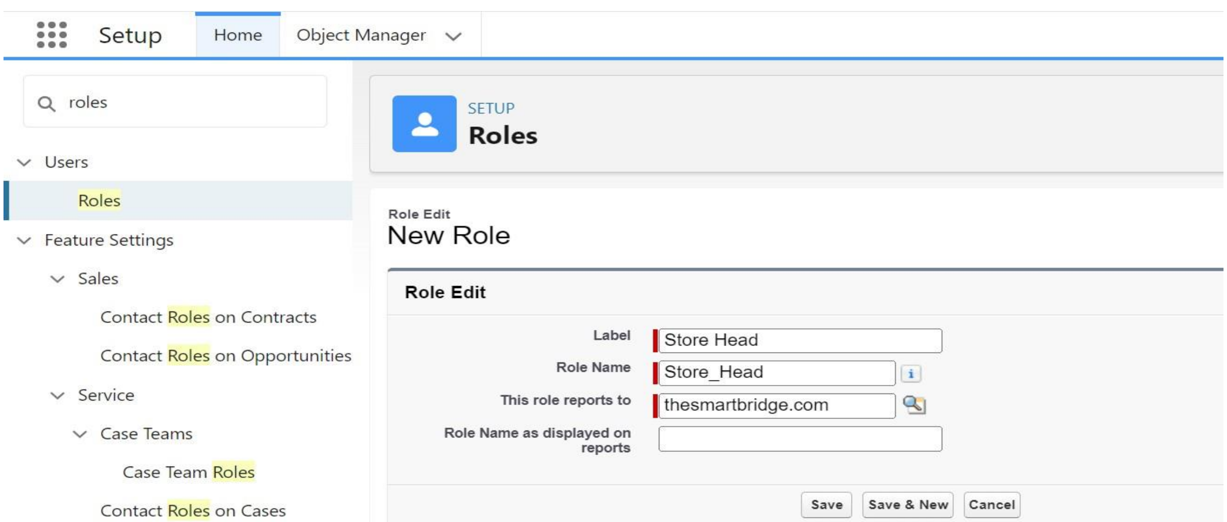
7. SetupRoles

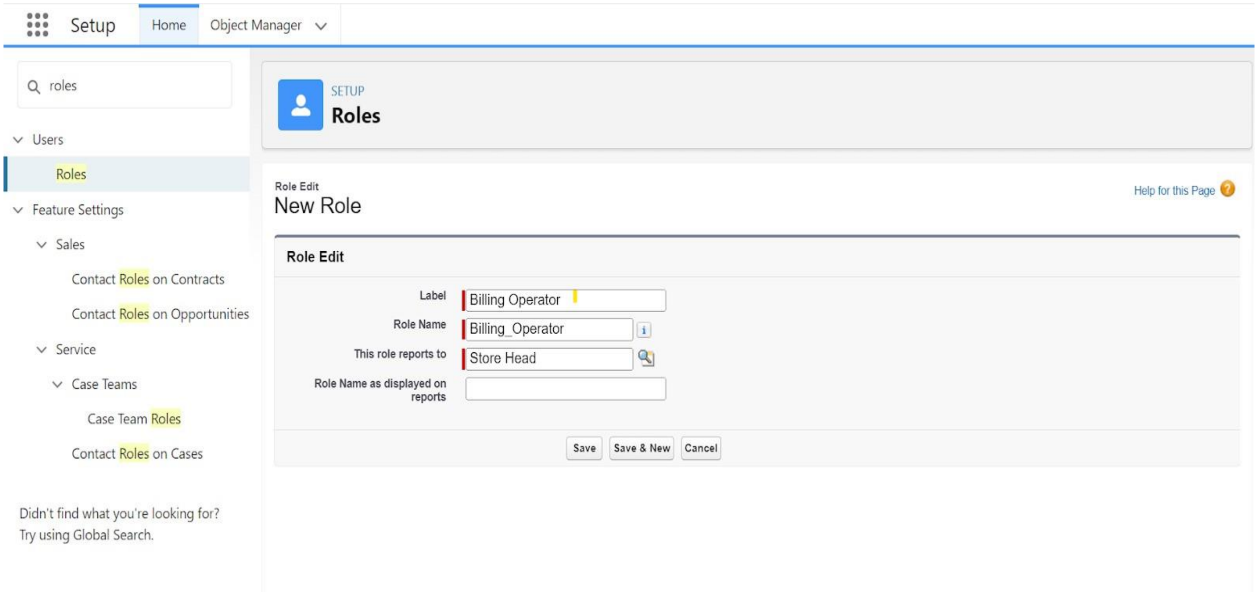
Rolesarerecord-levelaccesscontrolsthatdefinewhatdataausercanseein Salesforce.

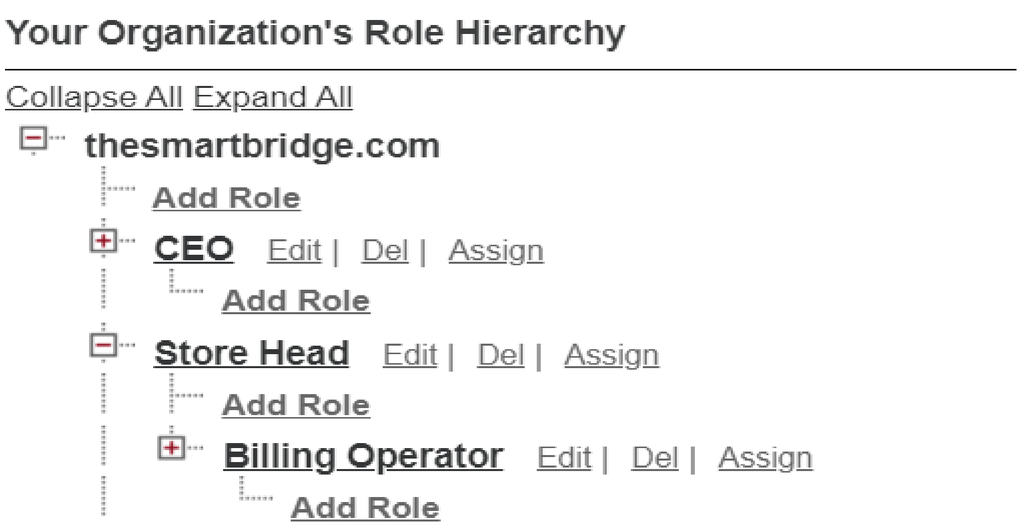
SetupRoles

1. Clickonthe**GearIcon**.
2. Click**Setup**.
3. Inthe**QuickFind**box,enter**Roles**.
4. Click**Roles**.
5. Clickon**SetUpRoles**.
6. Click**ExpandAll**.
7. Underthe**CEO**,clickon**AddRole**.
8. Fillinthe**Label**as**StoreHead**,andthe**RoleName**as**Store_Head**.
9. Entera**RoleName**thatwillbedisplayedonreports.
10. Clickon**Save**.

Similarly,createoneroleunderStoreHeadasBillingOperator.




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
Role Edit
New Role
Help for this Page
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

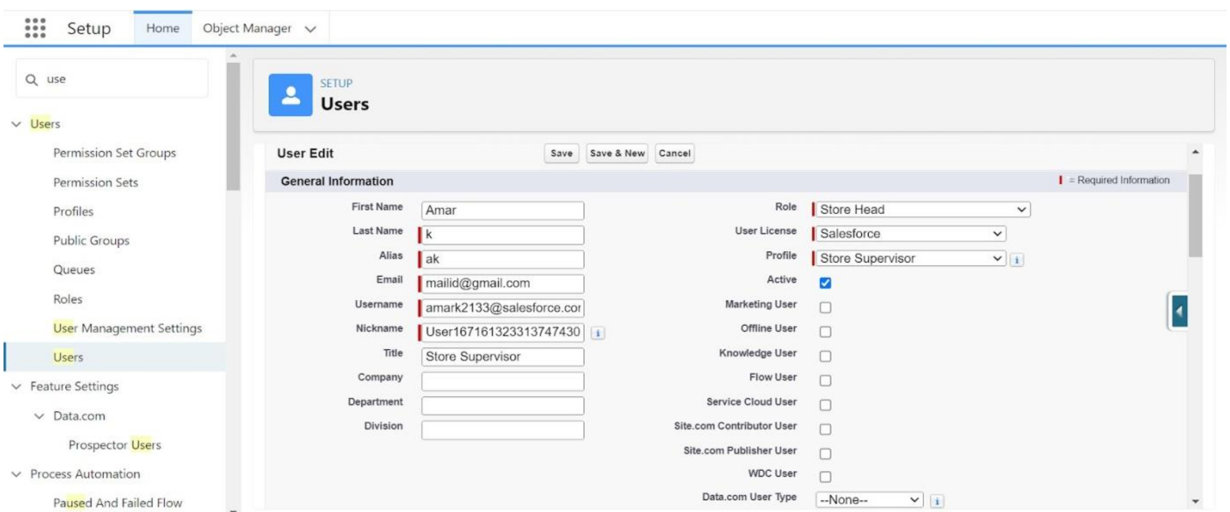

Your Organization's Role Hierarchy
Collapse All Expand All
thesmartbridge.com
Add Role
CEO Edit | Del | Assign
Add Role
Store Head Edit | Del | Assign
Add Role
Billing Operator Edit | Del | Assign
Add Role

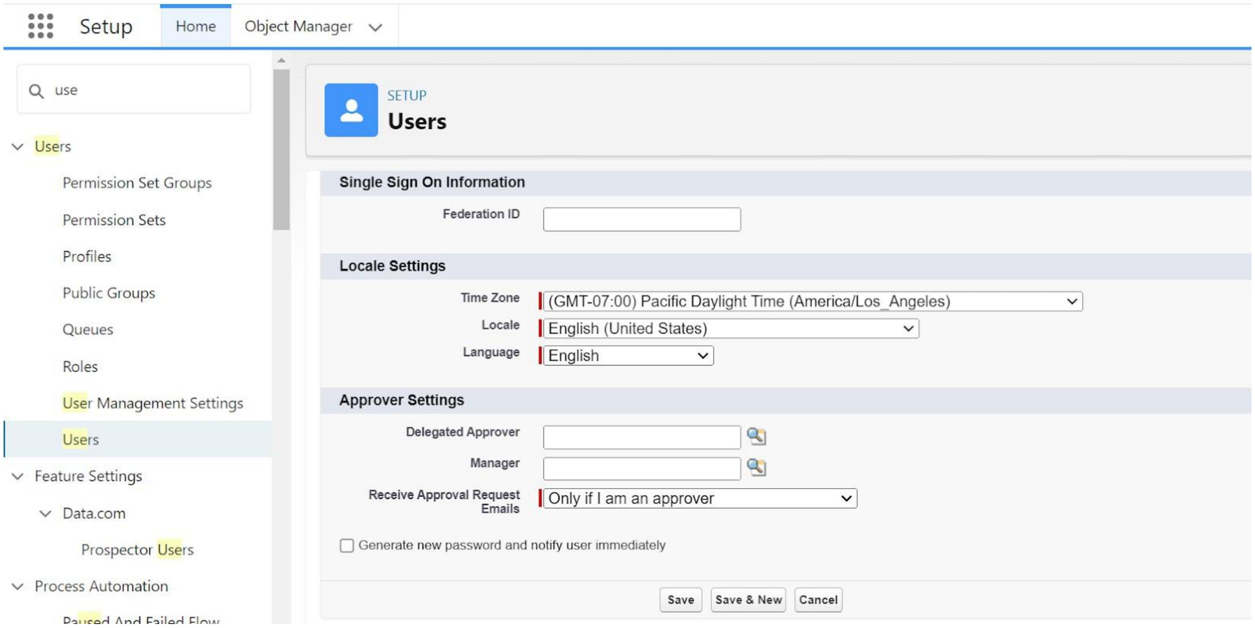
8. Users

AuserisanyonewhologsintoSalesforce.Usersareemployeesatyourcompany,such assalesreps,managers,andITspecialists,whoneedaccesstothecompany'srecords.Every user in Salesforce has a user account.

CreatingaUser:

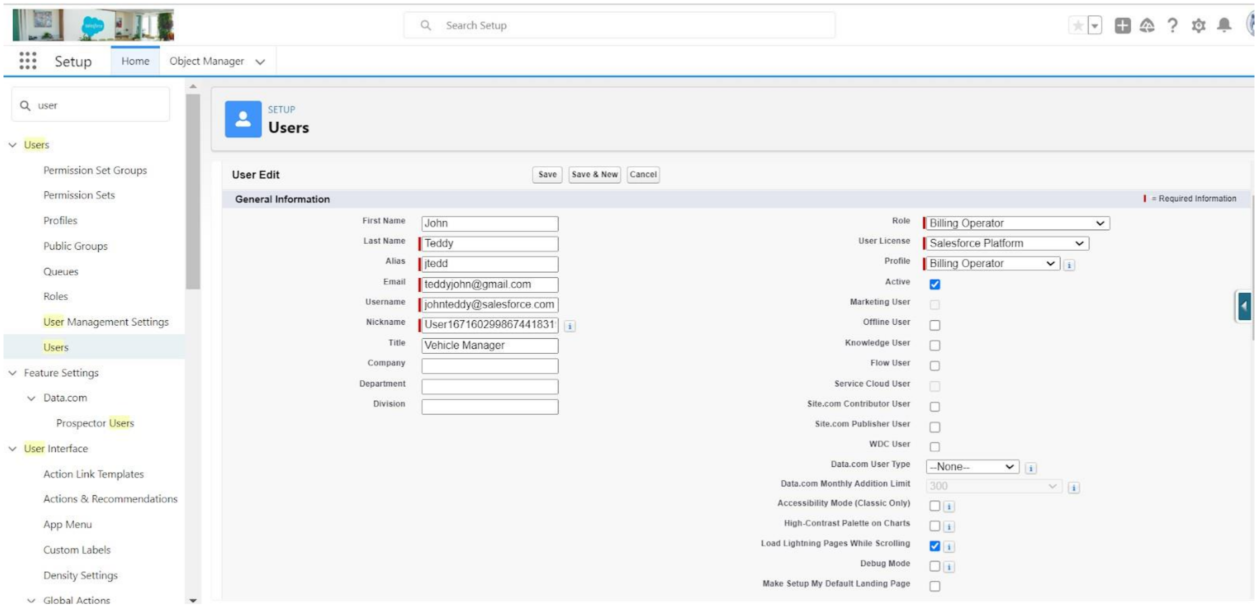
1. From**Setup**,inthe**QuickFind**box,enter**Users**,andthenselect**Users**.
2. Click**NewUser**.
3. Entertheuser'snameas**AmarK**andyouremailaddress,andcreateauniqueusername in the form of an email address. By default, the username is the same as the email address.
4. Selecta**Role**as**StoreHead**.
5. Selecta**UserLicense**as**Salesforce**.
6. Selecta**Profile**as**StoreSupervisor**.
7. Check**Generatenewpasswordandnotifytheuserimmediately**tohavetheuser'slogin name and a temporary password emailed to your email.
8. Fillinthefields(FirstName,LastName,Alias,EmailID,Username,Nickname,Role,User License, Profile).
9. Click**Save**.

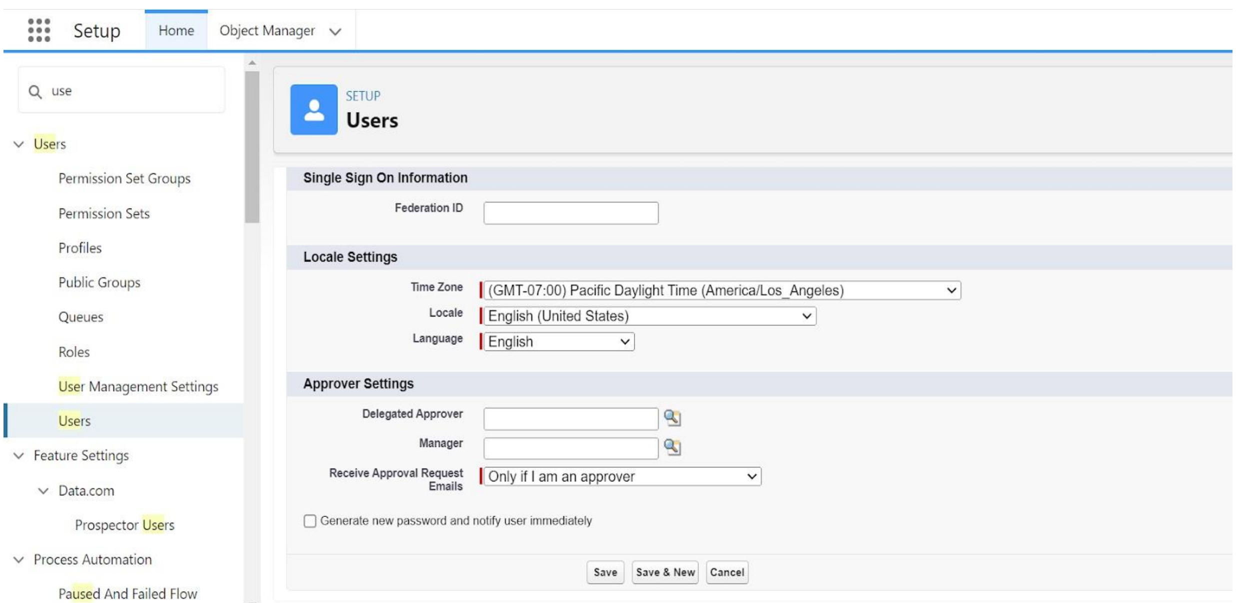




SecondUserCreation:

1. From**Setup**,inthe**QuickFind**box,enter**Users**,andthenselect**Users**.
2. Click**NewUser**.
3. Entertheuser'snameas**JohnTeddy**andyouremailaddress,andcreateaunique usernameintheformofanemailaddress.Bydefault,theusernameisthesameasthe email address.
4. Selecta**Role**as**BillingOperator**.
5. Selecta**UserLicense**as**SalesforcePlatform**.
6. Selecta**Profile**as**BillingOperator**.
7. Check**Generatenewpasswordandnotifytheuserimmediately**tohavetheuser'slogin name and a temporary password emailed to your email.
8. Fillinthefields(FirstName,LastName,Alias,EmailID,Username,Nickname,Role,User License, Profile).
9. Click**Save**.


Search Setup
Setup
Home
Object Manager
user
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
User Interface
Action Link Templates
Actions & Recommendations
App Menu
Custom Labels
Density Settings
Global Actions
SETUP
Users
User Edit
Save
Save & New
Cancel
General Information
= Required Information
First Name
John
Last Name
Teddy
Alias
jtedd
Email
teddyjohn@gmail.com
Username
johnteddy@salesforce.com
Nickname
User16716029986744183
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
--None--
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


Setup
Home
Object Manager
use
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
Process Automation
Paused And Failed Flow
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

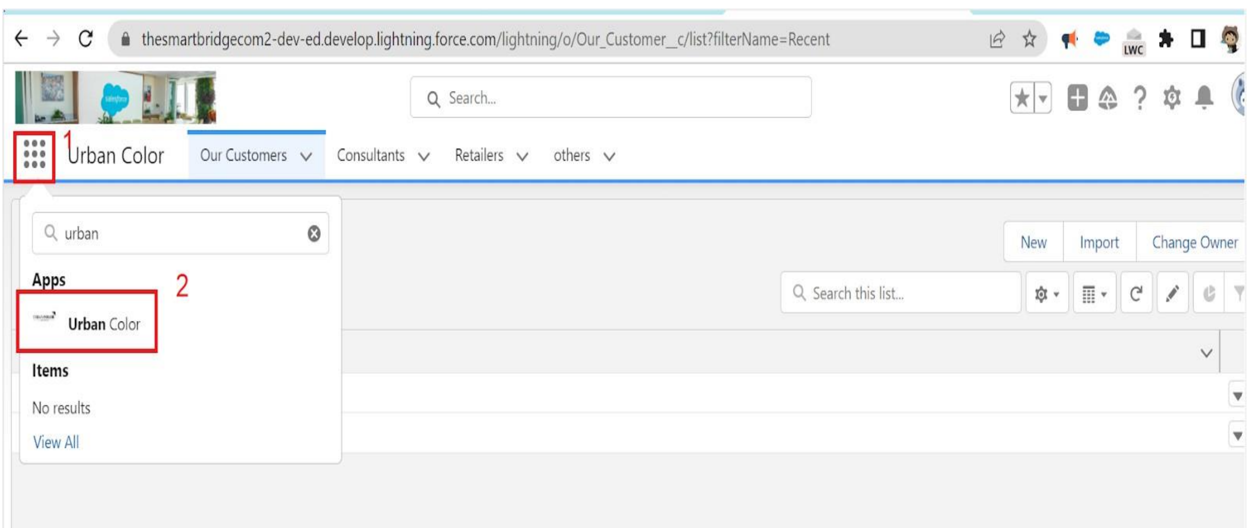
9. UserAdoption

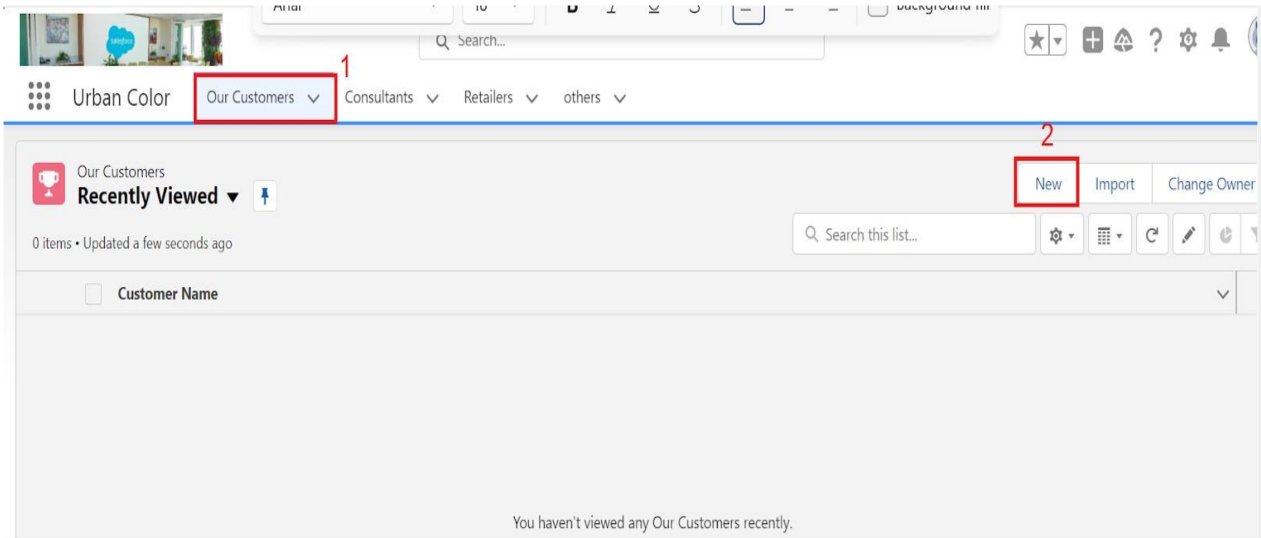
Weneedtounderstanduseradoptionandnavigation.Howtointeractwithdatabaseand their records.

Toensureeffective**useradoption**andnavigation,it'simportanttoeducateusersonhow to interact with the Salesforce database and manage records. The following steps outline key areas to focus on:

CreateOurCustomerRecord

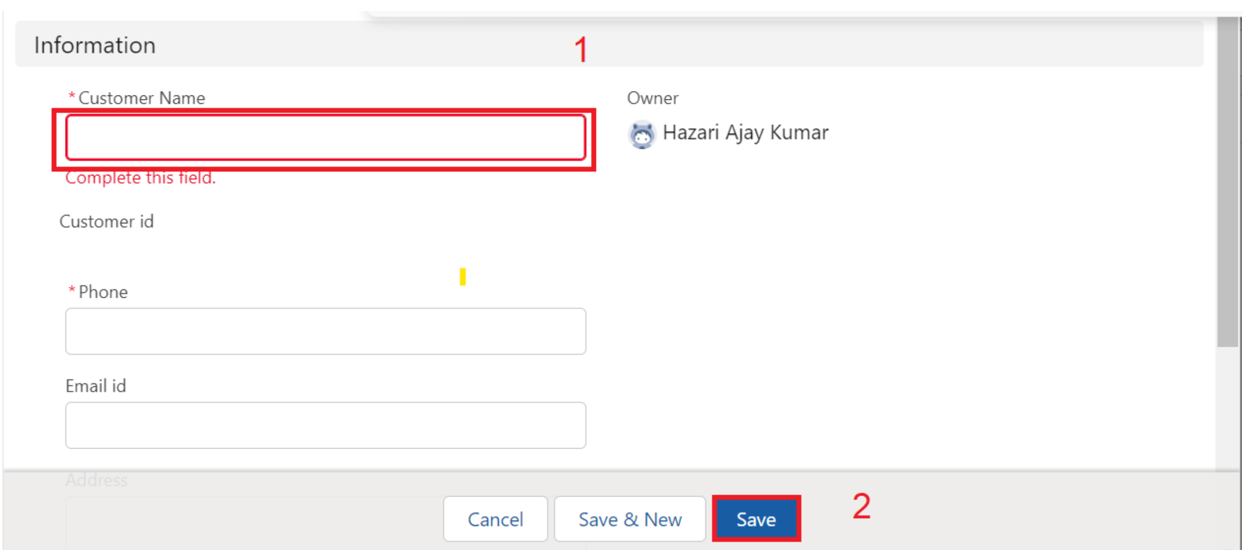
1. Clickonthe**AppLauncher**ontheleftsideofthescreen.
2. Searchfor**UrbanColor**andclickonit.
3. Clickonthe**OurCustomer**tab.
4. Clickthe**New**button.
5. Fillinallthe**OurCustomer**recorddetails.
6. Clickonthe**Save**button.

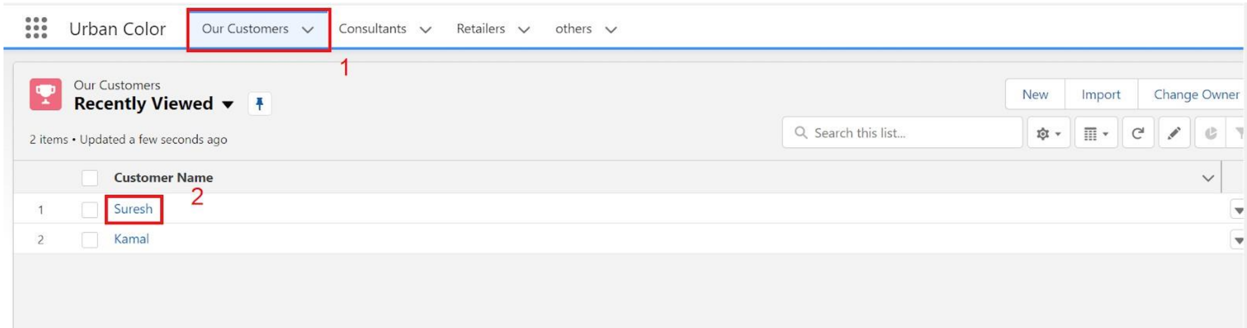


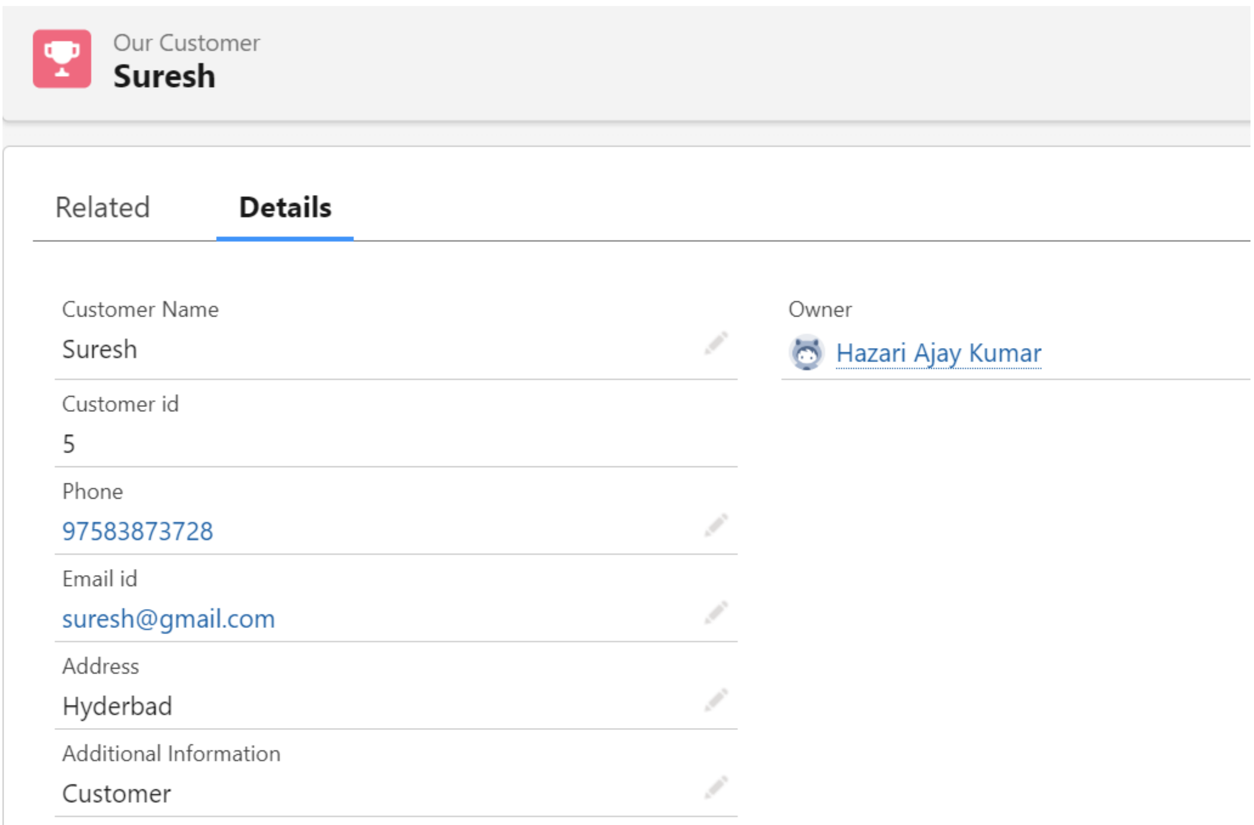


ViewRecord (OurCustomer)

1. ClickontheAppLauncherontheleftsideofthescreen.
2. SearchforUrbanColorandclickonit.
3. ClickontheOurCustomertab.
4. ClickonanyrecordnametoviewthedetailsoftheOurCustomer.

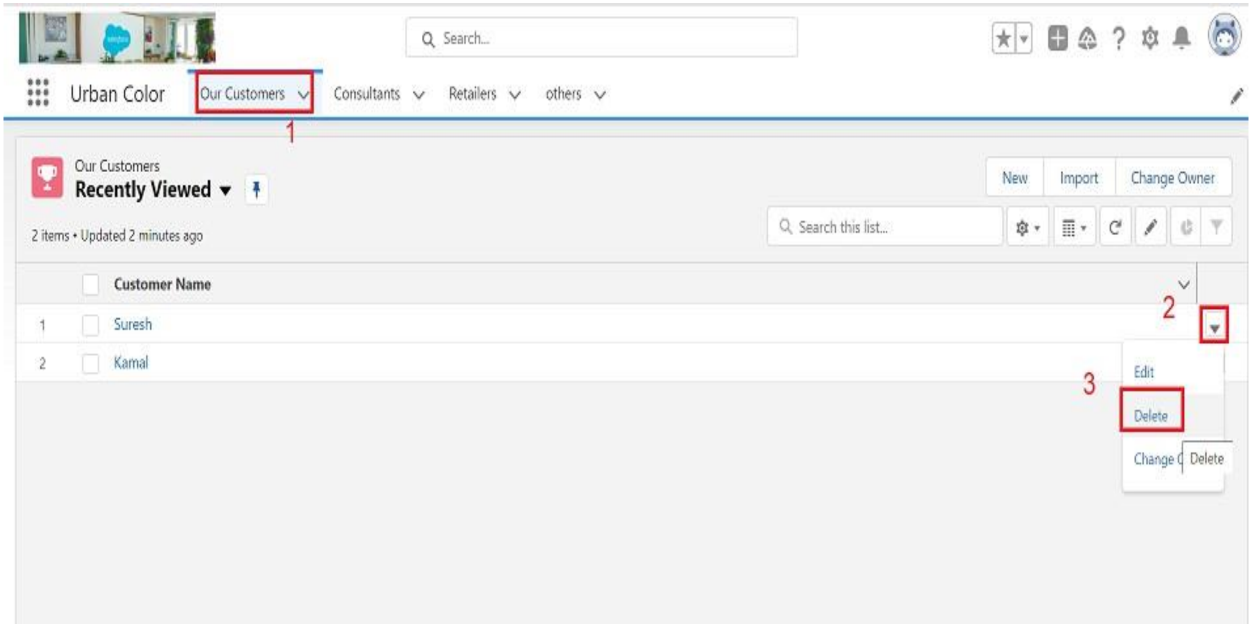




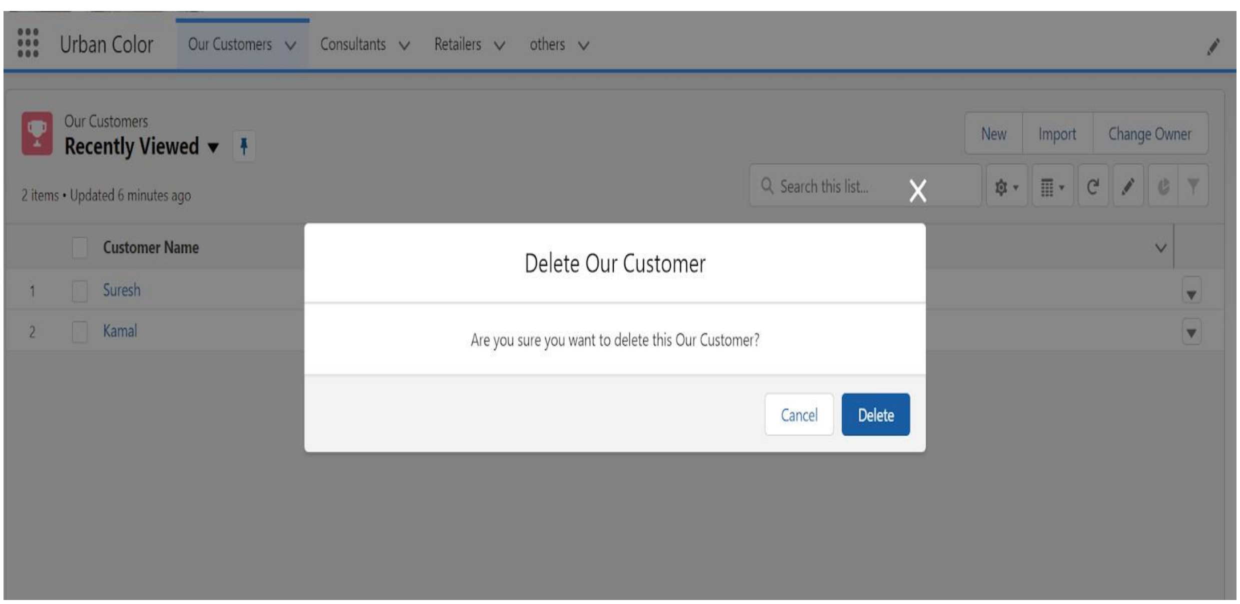


DeleteRecord(OurCustomer)

1. Clickonthe**AppLauncher**ontheleftsideofthescreen.
2. Searchfor**UrbanColor**andclickonit.
3. Clickthe**OurCustomer**tab.
4. Clickonthe**Arrow**ontheright-handsideoftheparticularrecord.
5. Click**Delete**,andthenconfirmbyclicking**Delete**again.



Search...
Urban Color
Our Customers
Consultants
Retailers
others
1
Our Customers
Recently Viewed
New
Import
Change Owner
Search this list...
2 items • Updated 2 minutes ago
Customer Name
2
1 Suresh
2 Kamal
Edit
3
Delete
Change O
Delete

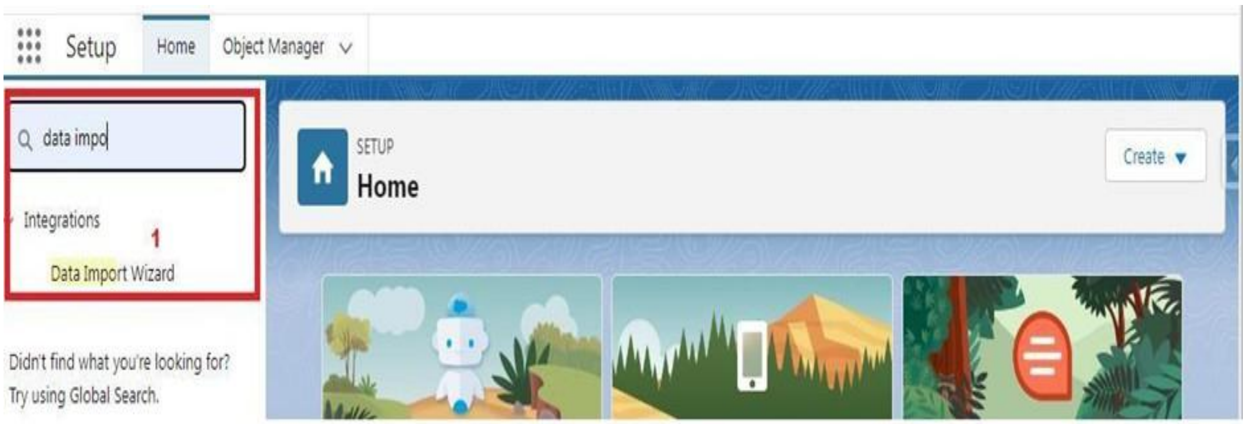


Urban Color
Our Customers
Consultants
Retailers
others
Our Customers
Recently Viewed
New
Import
Change Owner
Search this list...
2 items • Updated 6 minutes ago
Customer Name
1 Suresh
2 Kamal
Delete Our Customer
Are you sure you want to delete this Our Customer?
Cancel
Delete

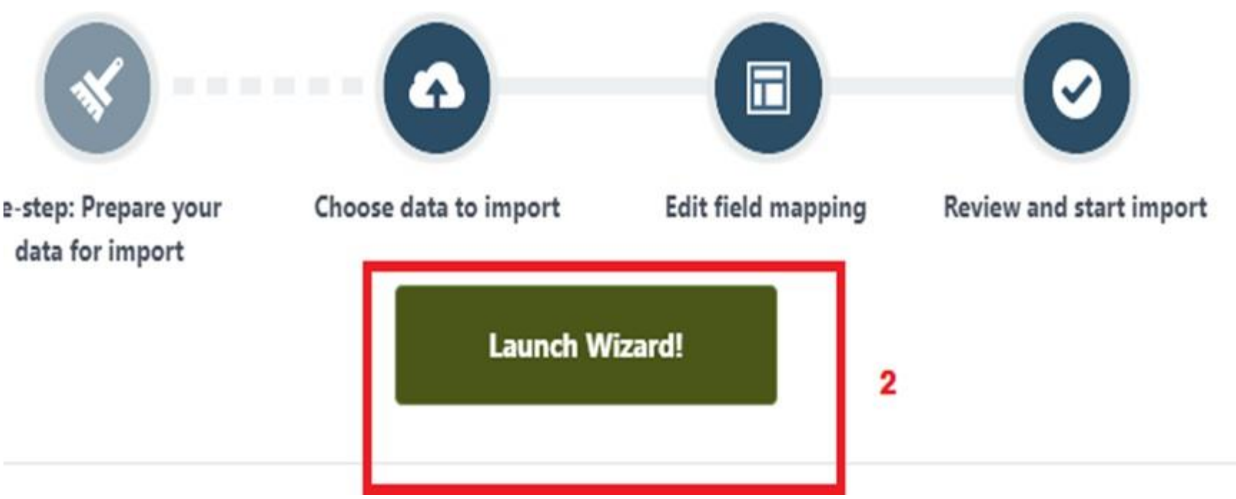
10. Import Data

DataImportWizard—Thistool,accessiblethroughthe**Setup**menu,allowsyoutoimport data into common standard objects such as **Contacts, Leads, Accounts**, as well as data into custom objects.
ToImportData

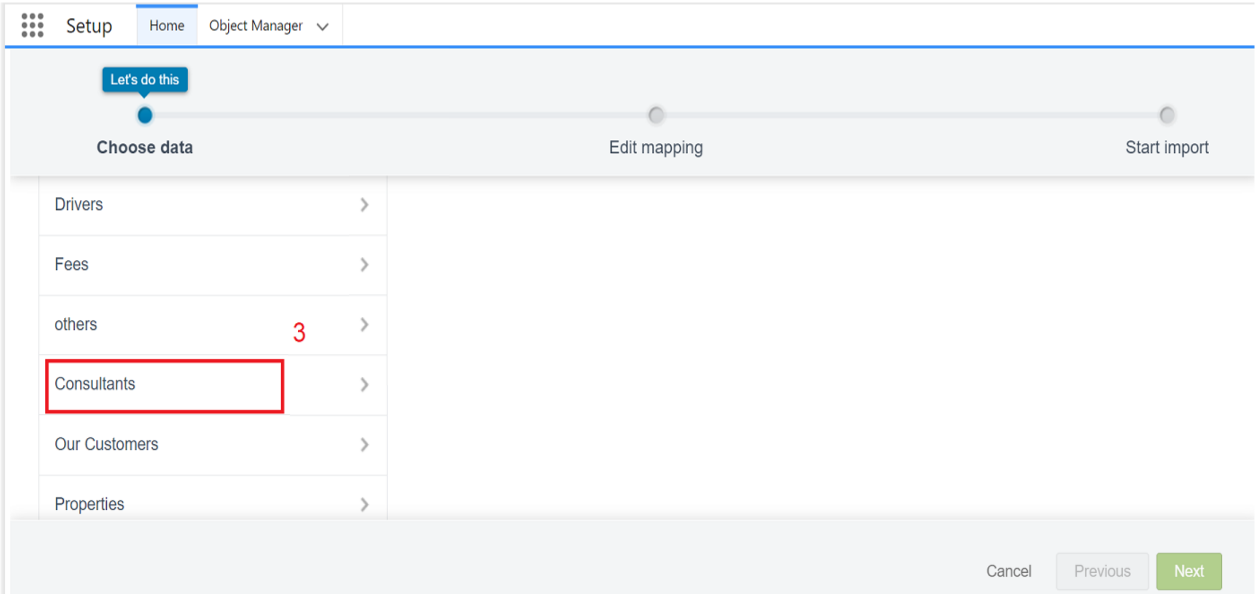
1. From**Setup**,clickthe**Home**tab.
2. Inthe**QuickFind**box,enter**DataImport**andselect**DataImportWizard**.



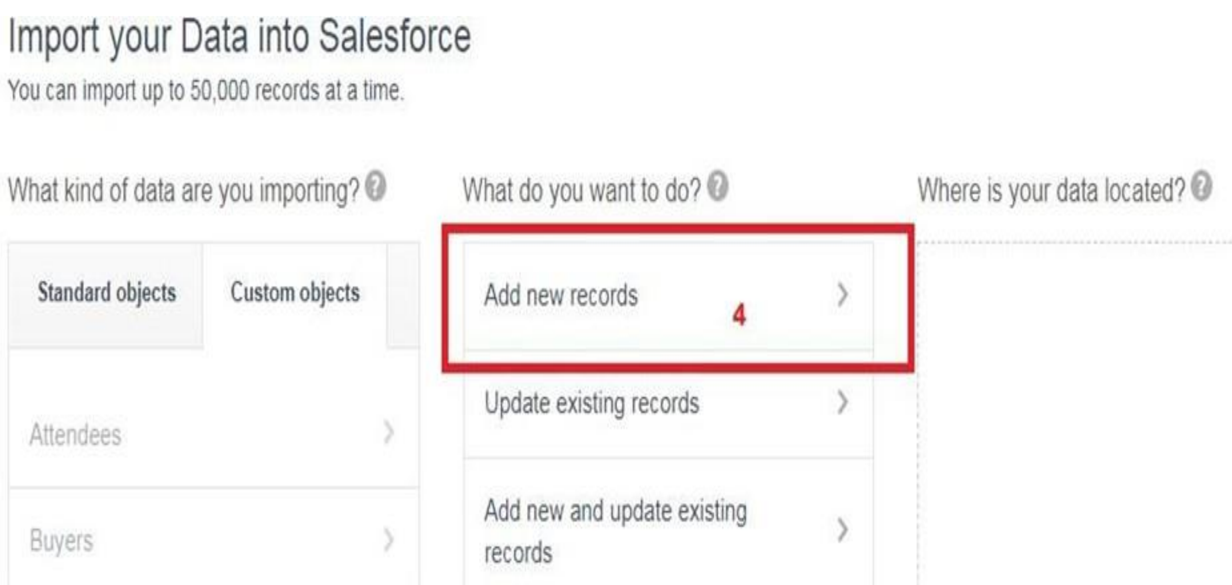
3. Click**LaunchWizard!**



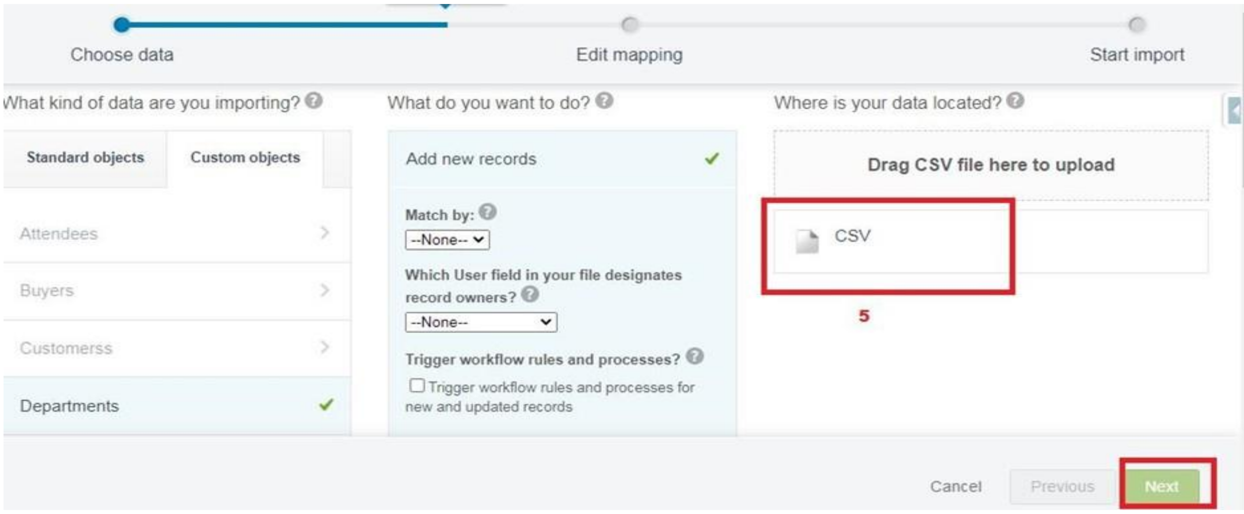
4. Clickthe**CustomObjects**tabandselectthe**Consultant**object



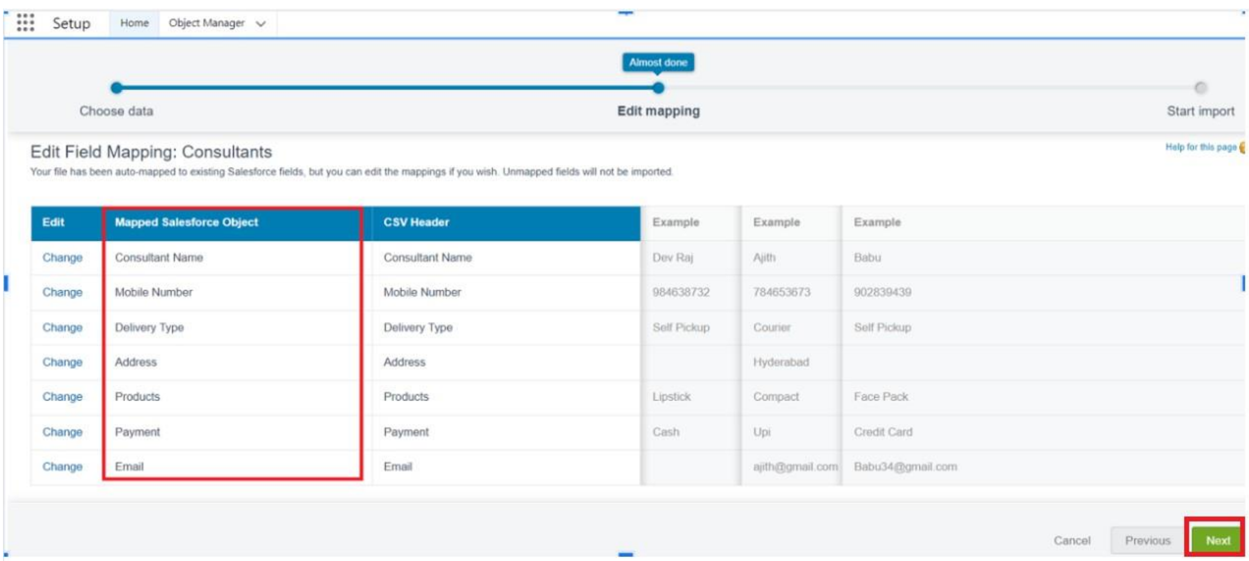
5. Select**AddNewRecords**.



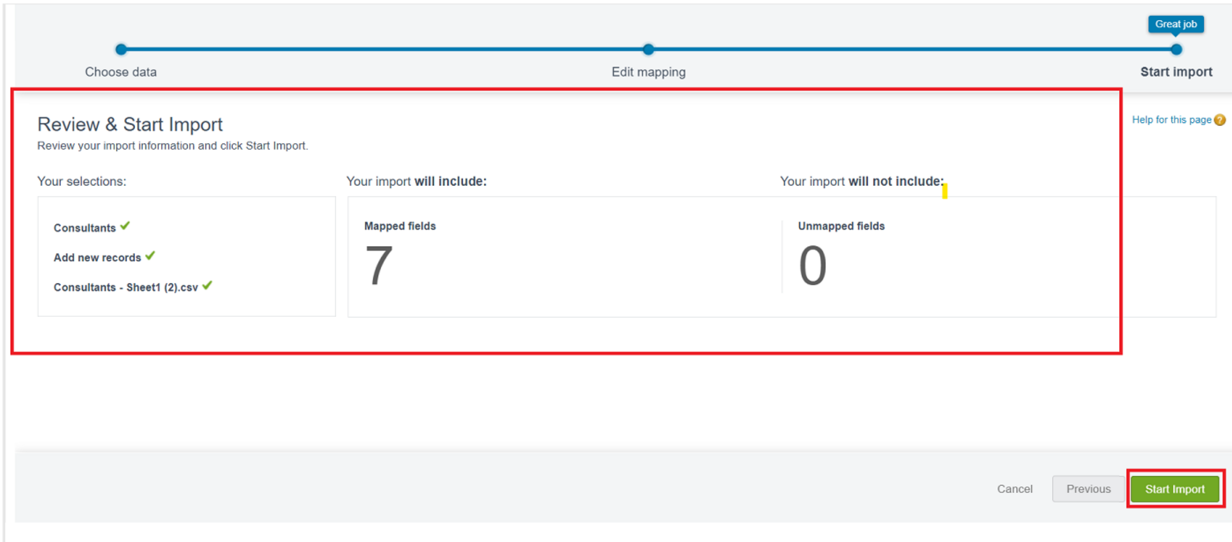
6. Click**CSV**andchoosethefile**Consultant_CSV**whichwascreatedearlier.Click**Next**.



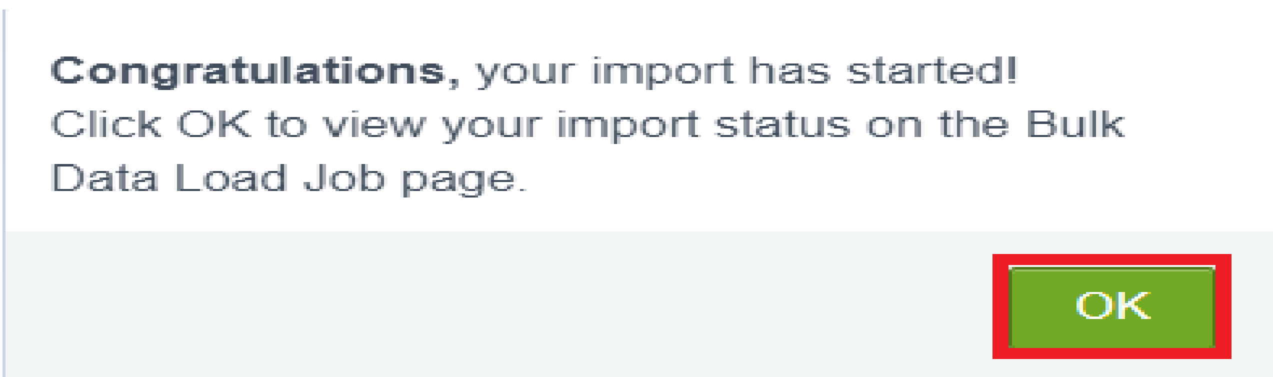
7. Since the field names in the CSV file (CSV Header) are the same as the field names in yourobject(MappedSalesforceObject),thefieldsareautomaticallymapped.Click**Next**.



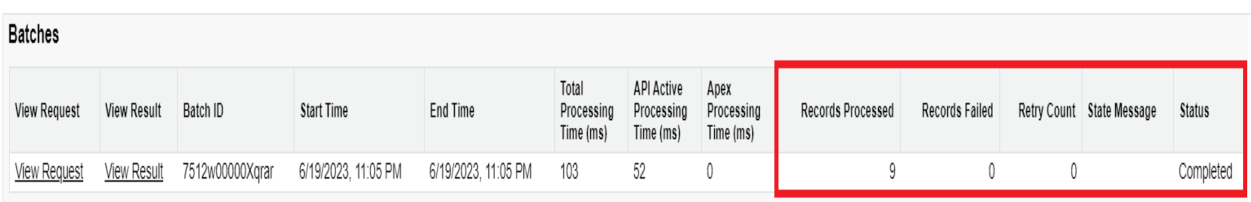
8. Thenextscreengivesyouasummaryofyourdataimport.Click**StartImport**.



9. Click**OK**onthepopup.



10. Scrolldownthepageandverifythatyourdatahasbeenimportedunder**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
View Request	View Result	7512w00000Xqrar	6/19/2023, 11:05 PM	6/19/2023, 11:05 PM	103	52	0	9	0	0		Completed

11. Makesureyouhave**0records**underthe**RecordsFailed**column.

Note: Perform**FieldMapping**carefully.

Hereistheformattedtextforyourdocument:

11. WhatareReports?

Reports
ReportsinSalesforcearelistsofrecordsthatmeetspecificcriteria,providinganswersto particularquestions.Theserecordsaredisplayedinatableformatthatcanbefilteredor grouped based on any field.

Thereare4typesofreportformatsinSalesforce:

1. **TabularReports:**
   - Themostbasicreportformat,displayingrowsofrecordsinatablewithagrand total.
   - Easytosetupbutcannotbeusedtocreategroupsofdataorchartsandcannot be used in Dashboards.
   - Primarilyusedtogeneratesimplelistsorlistswithagrandtotal.
2. **SummaryReports:**
   - Themostcommonlyusedreportformat,allowingthegroupingofrowsofdata, viewing subtotals, and creating charts.
3. **MatrixReports:**
   - Themostcomplexreportformat,summarizinginformationinagridformat.
   - Allowsrecordstobegroupedbybothcolumnsandrows.
   - Canbeusedtogeneratedashboardsandaddcharts.
4. **JoinedReports:**
   - Allowsthecreationofdifferentviewsofdatafrommultiplereporttypes.
   - Datainjoinedreportsisorganizedinblocks,eachactingasasubreportwithits own fields, columns, sorting, and filtering.
   - Usedtogroupandshowdatafrommultiplereporttypesindifferentviews.

ReportTypes:
A **Report Type** determines which set of recordswillbeavailableinareport.Eachreport isbasedonaparticularreporttype,selectedfirstwhencreatingareport.Everyreporttypehasa primary object and one or more related objects, all ofwhichmustbelinkedtogetherdirectlyor indirectly.

- Areporttypecannotincludemorethan4objects.
- Oncereportiscreated,itsreporttypecannotbechanged.

There are 2types of reporttypes:

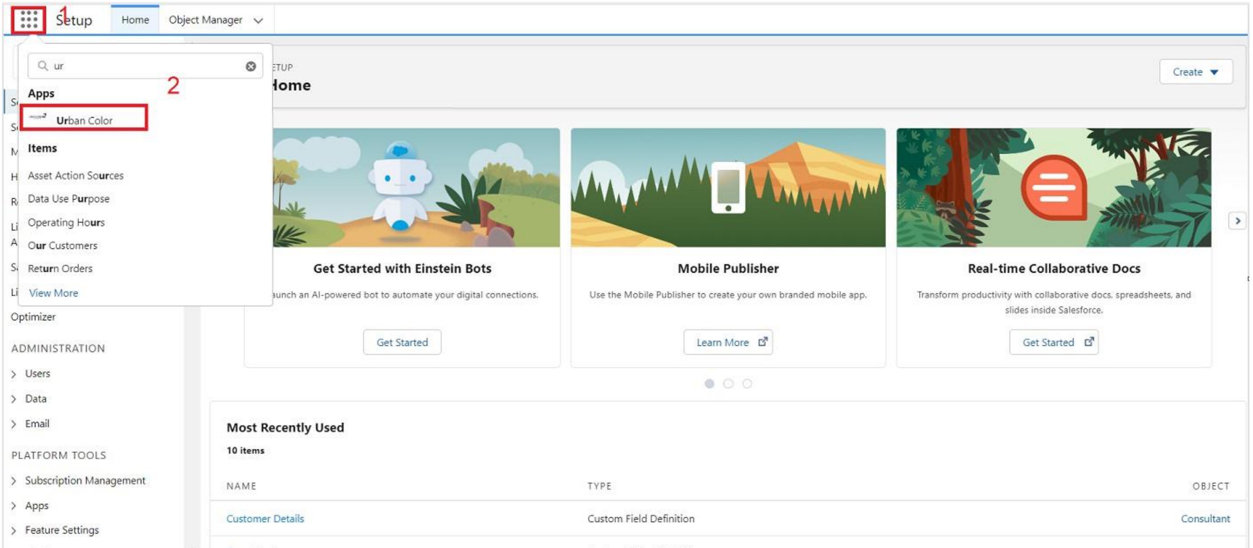
1. **StandardReportTypes:**
   - Automaticallyincludedwithstandardobjectsandcustomobjectswhere"Allow Reports" is checked.
   - Cannotbecustomizedandautomaticallyincludestandardandcustomfieldsfor each object within the report type.
   - Createdwhenanobjectorarelationshipiscreated.
   - **Note:**Standardreporttypesalwayshaveinnerjoins.
2. **CustomReportTypes:**
   - Createdbyanadministratororuserwith"ManageCustomReportTypes" permissionwhenstandardreporttypescannotspecifywhichrecordswillbe available in reports.
   - Allowsspecificationofobjectsthatwillbeavailableinaparticularreport.
   - Theprimaryobjectmusthavearelationshipwithotherobjectspresentinthe report type, either directly or indirectly.

Thereare3typesofaccesslevelsfor folders:

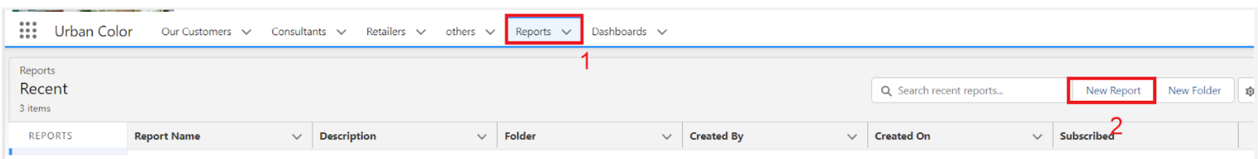
1. **Viewer:**
   - Userscanseethedatainareportbutcannotmakeanychangesexceptcloningit into a new report.
2. **Editor:**
   - Userscanviewandmodifythereportsandmovethemto/fromanyotherfolders they have access to as Editor or Manager.
3. **Manager:**
   - UserscandoeverythingViewersandEditorscando,pluscontrolotherusers' access levels to the folder.
   - Managerscanalsodeletethereport.

11.1. CreateReport

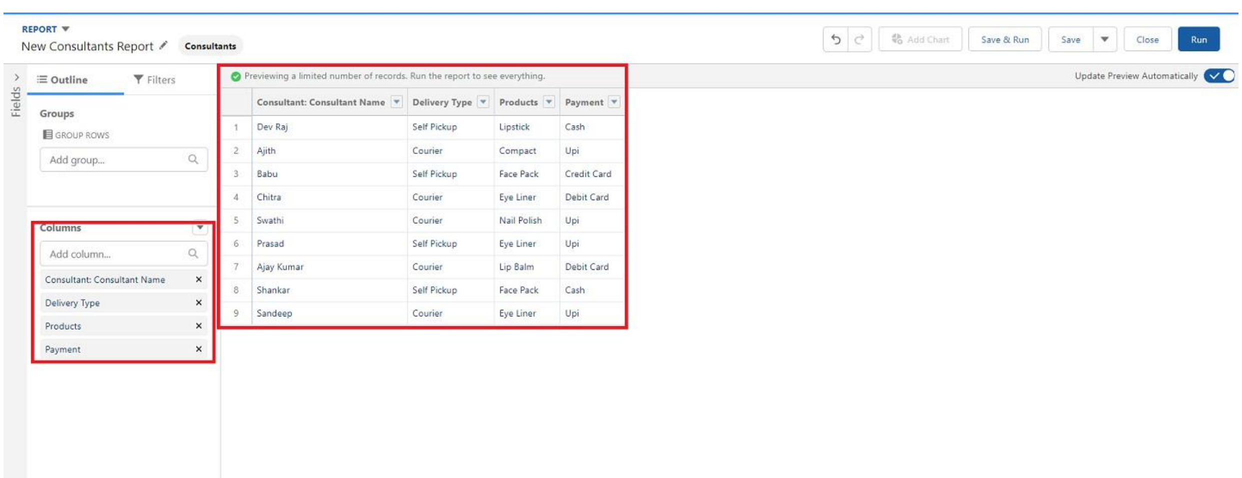
1. Click**AppLauncher**.
2. Select**UrbanColorApp**.
3. Clickthe**Reports**tab.



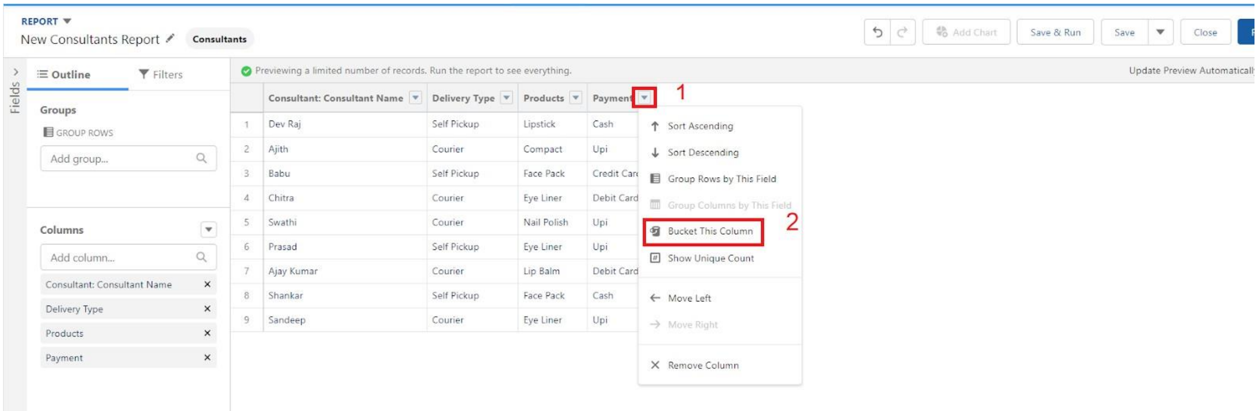
4. Click**NewReport**.



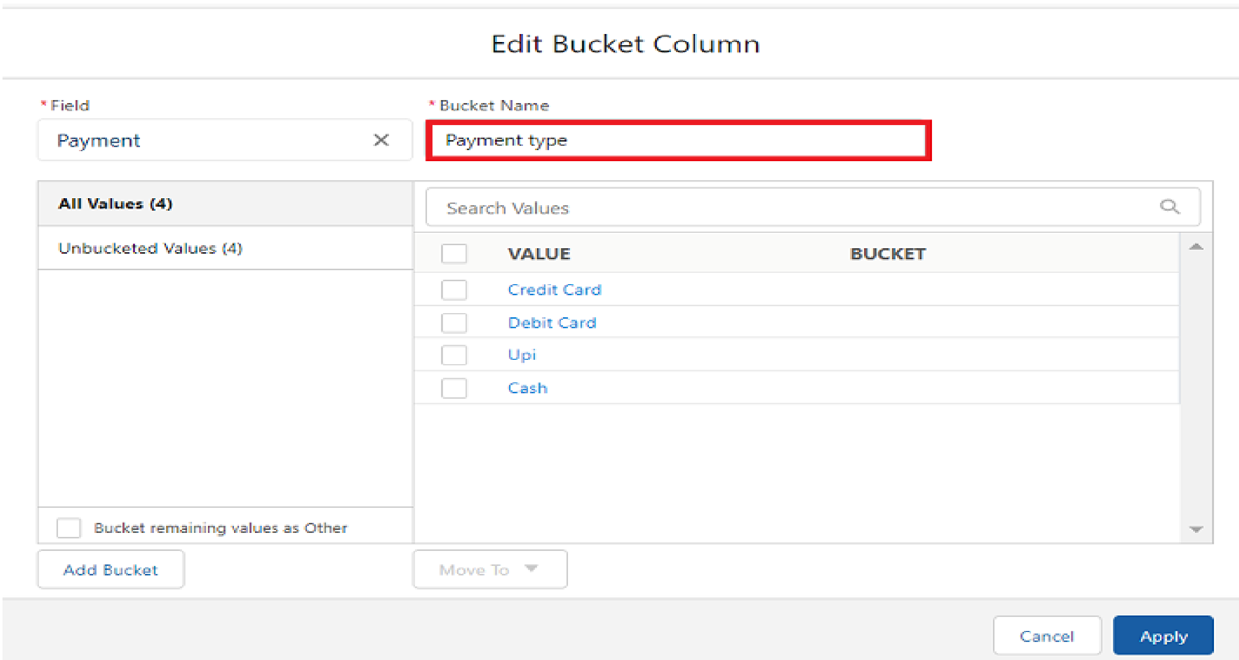
5. Selectthereporttypeas**Consultants**andclick**StartReport**.
6. Customizeyourreportbyselectingthefollowingcolumns:**ConsultantName,Delivery Type, Products, Payment**.



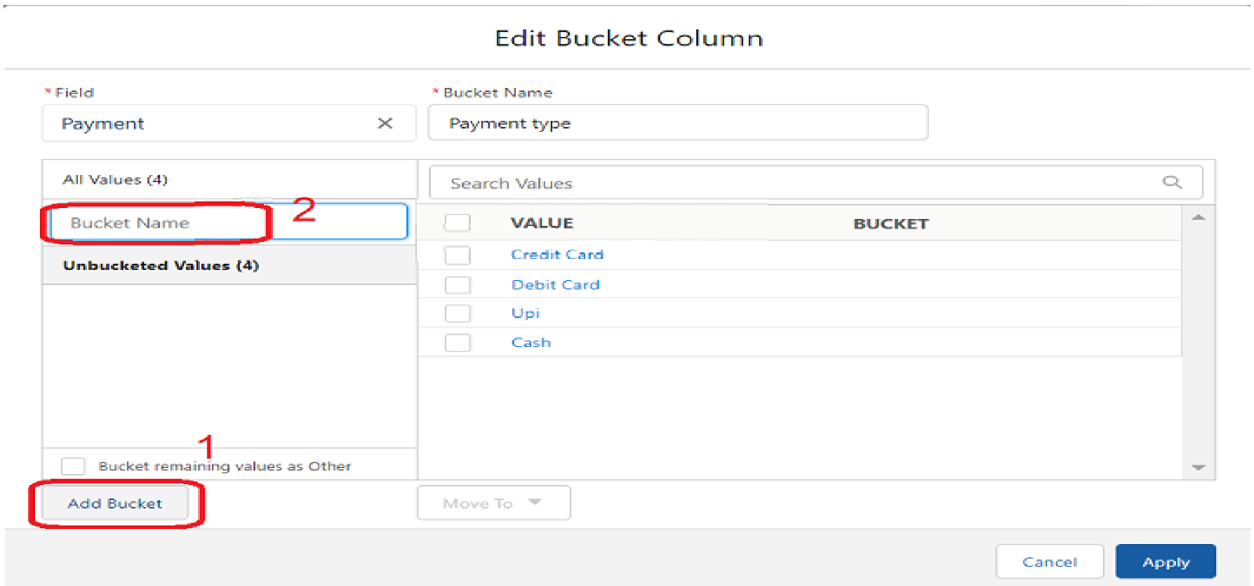
7. Clickthedrop-downoptiononthe**Payment**columnandselect**BucketThisColumn**.



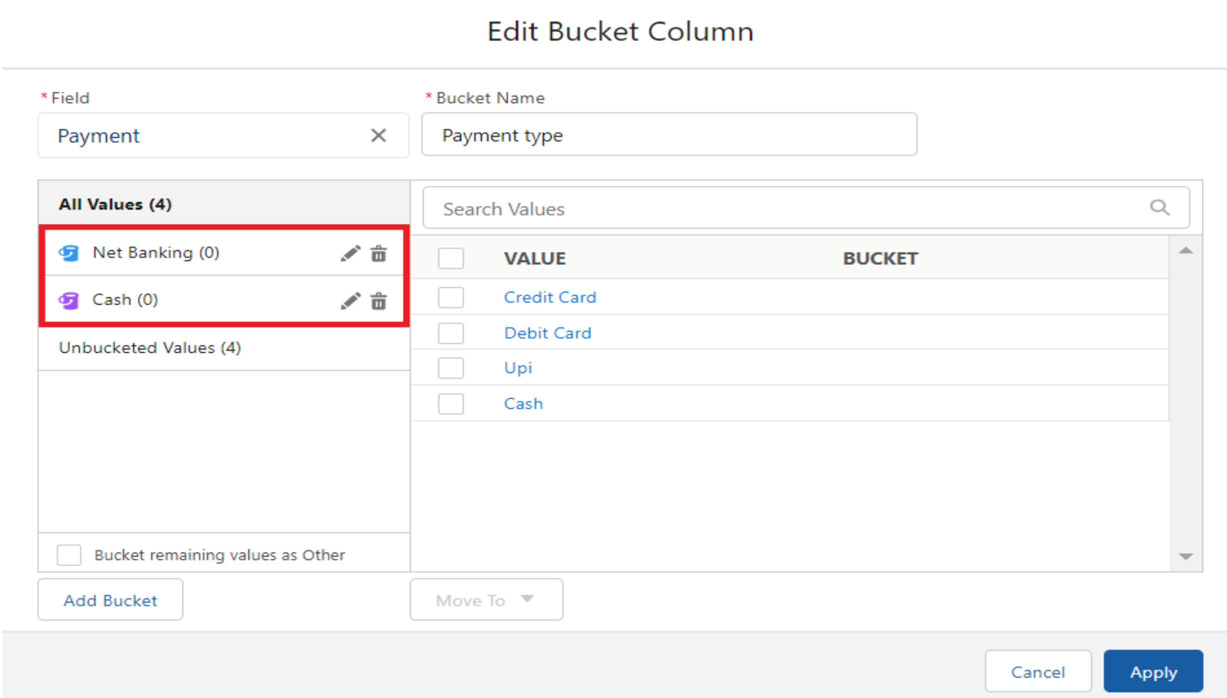
8. NamethebucketPaymentType**PaymentType**.

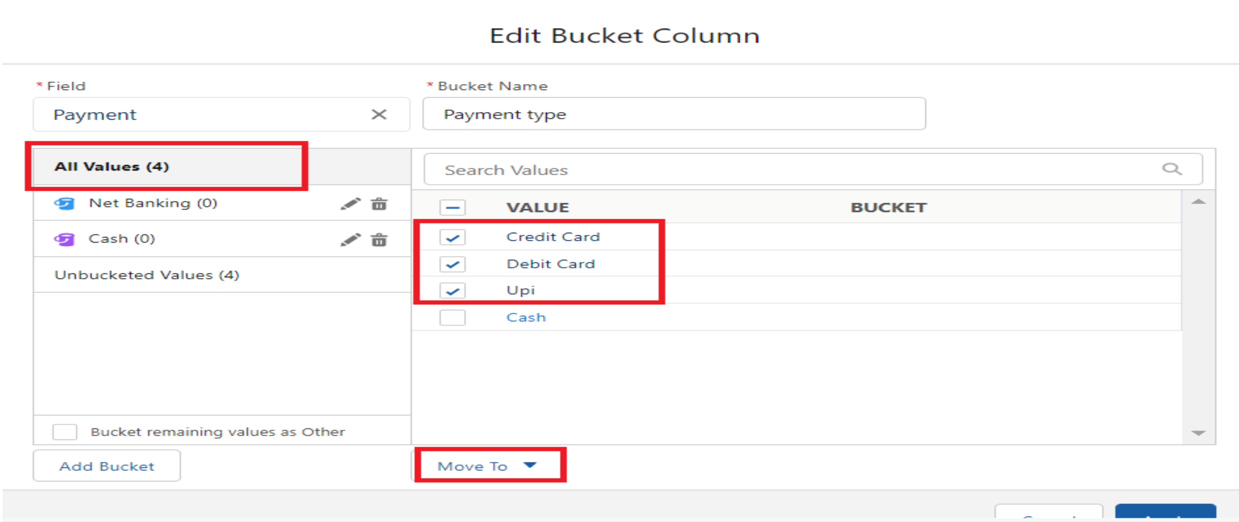


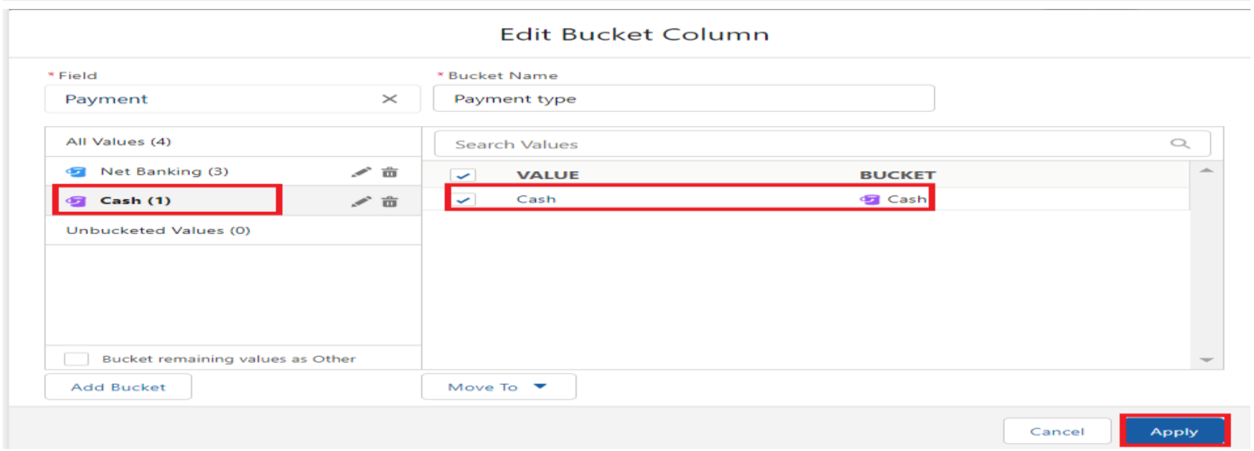
9. Click**AddBucket**andnameit**NetBanking**.
10. Click**AddBucket**andnameit**Cash**.



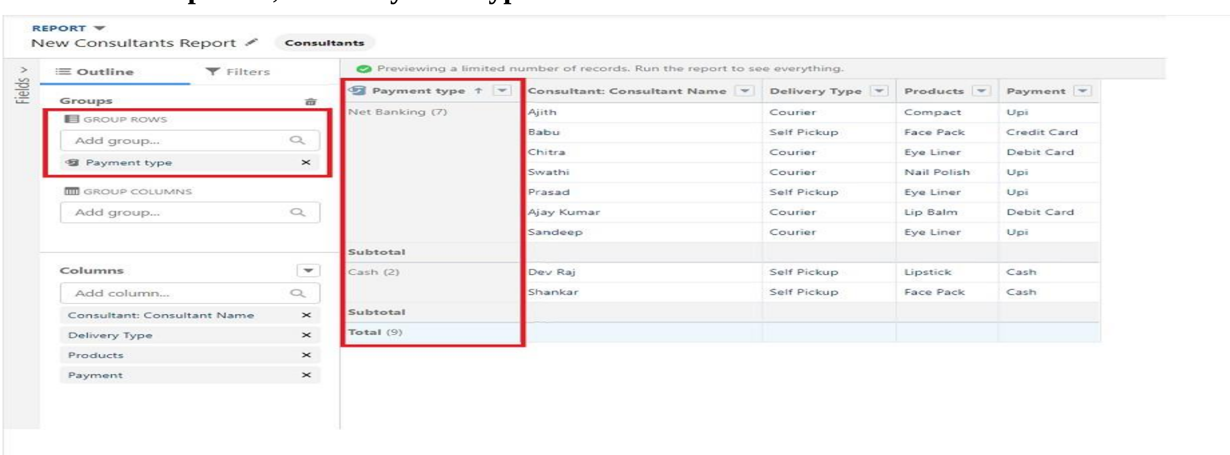
11. Clickon**AllValues**,select**CreditCard,DebitCard,UPI**,andmovethemto**NetBanking**.



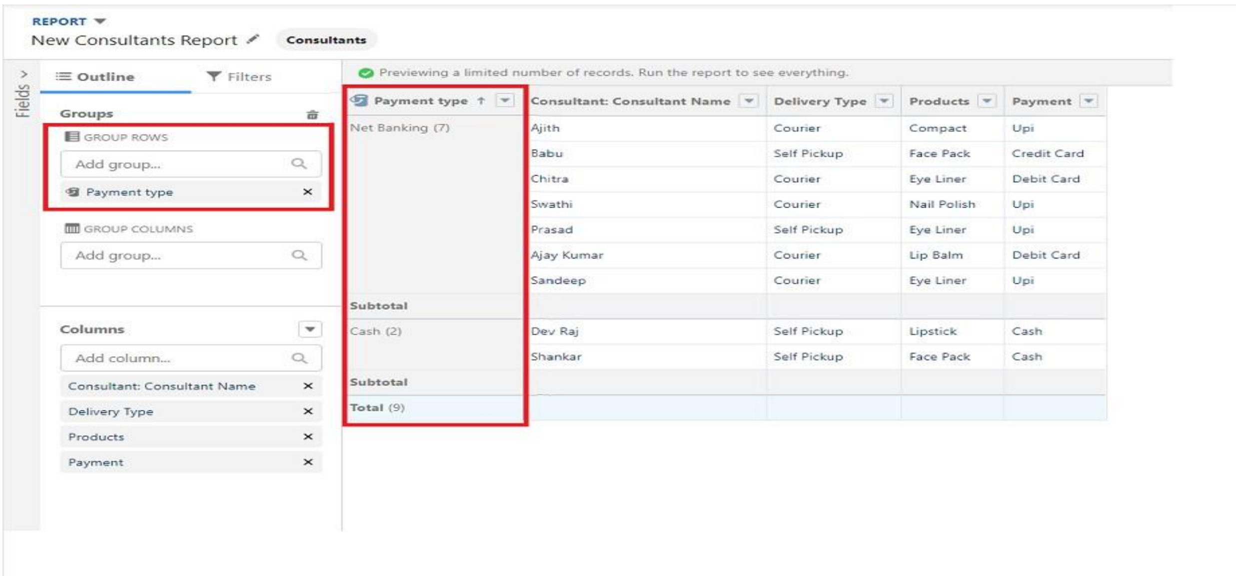




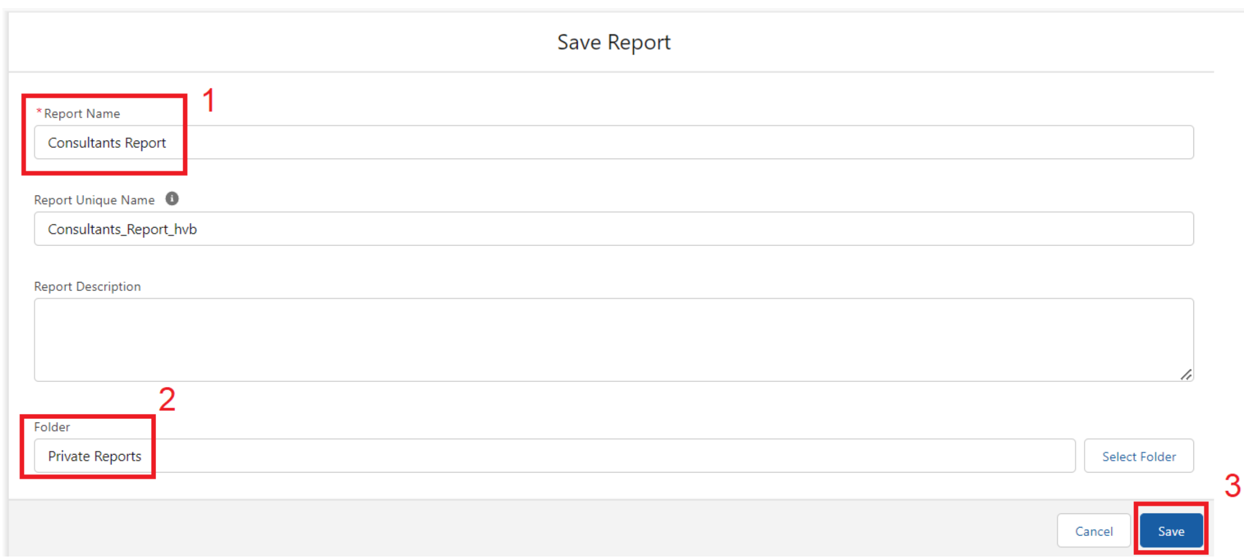
12. ClickonAllValuesagain,select**Cash**,andmoveitto**Cash**.
13. Click**Apply**.
14. In**GroupRows**,addthe**PaymentTypeBucket**field.



15. Click**Refresh**.
16. Click**SaveandRun**.
17. Givethereportaname,e.g.,**ConsultantReport**.

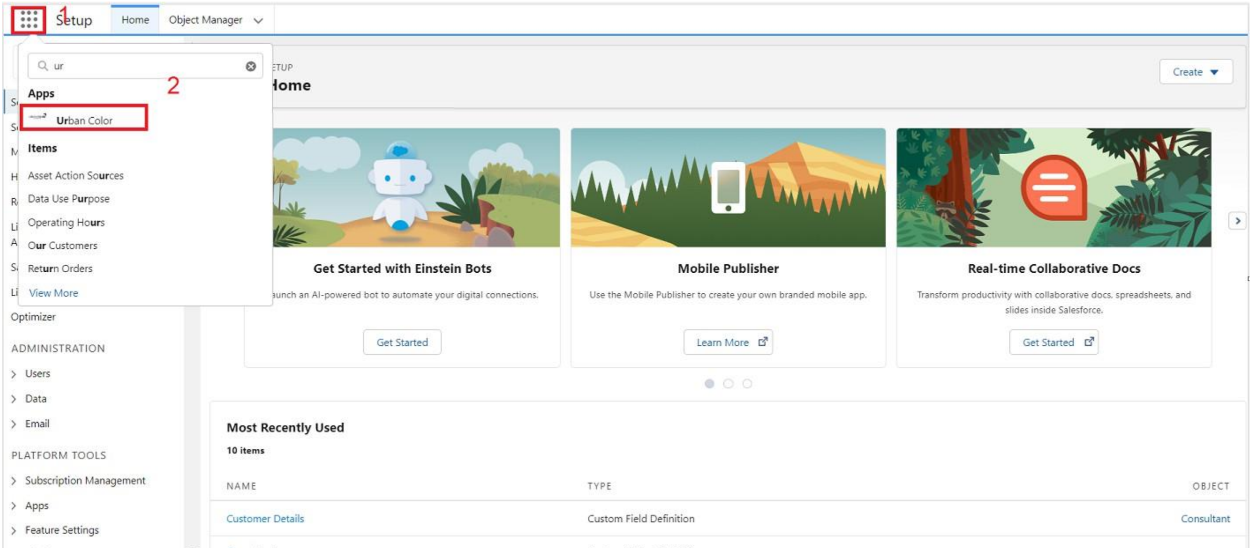


18. Click**Save**.

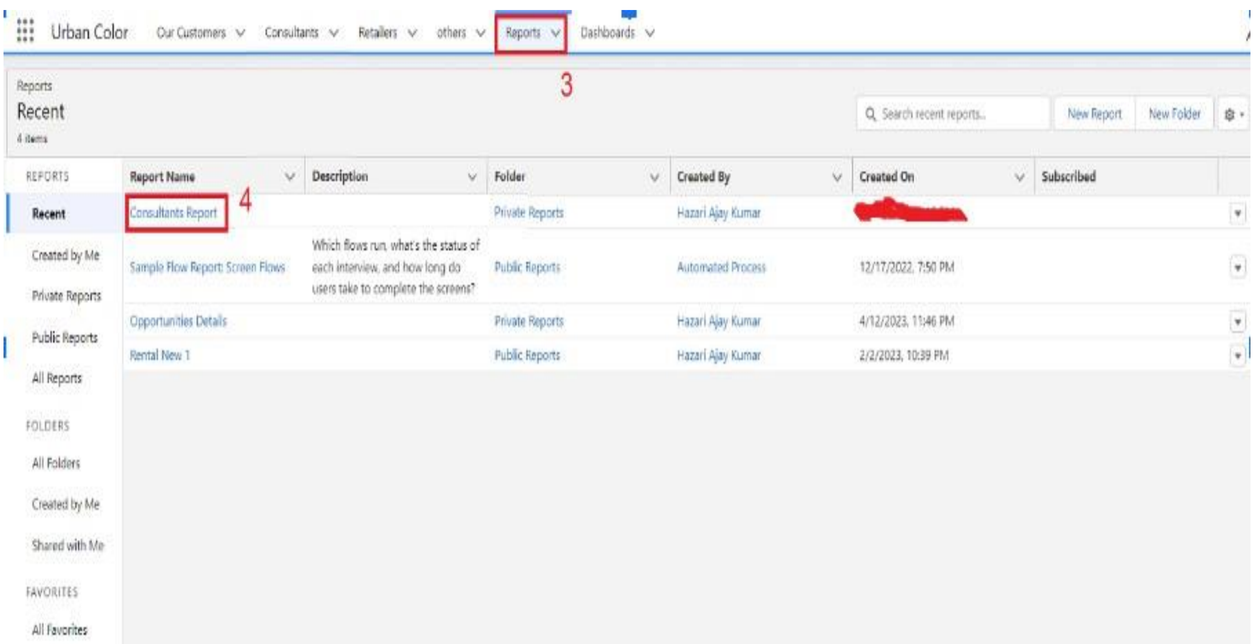


11.2. ViewReport

1. Clickonthe**AppLauncher**ontheleftsideofthescreen.
2. Searchfor**UrbanColorApp**andclickonit.



3. Clickthe**Reports**tab.
4. Clickonthe**UrbanColorReport**toviewtherecords.



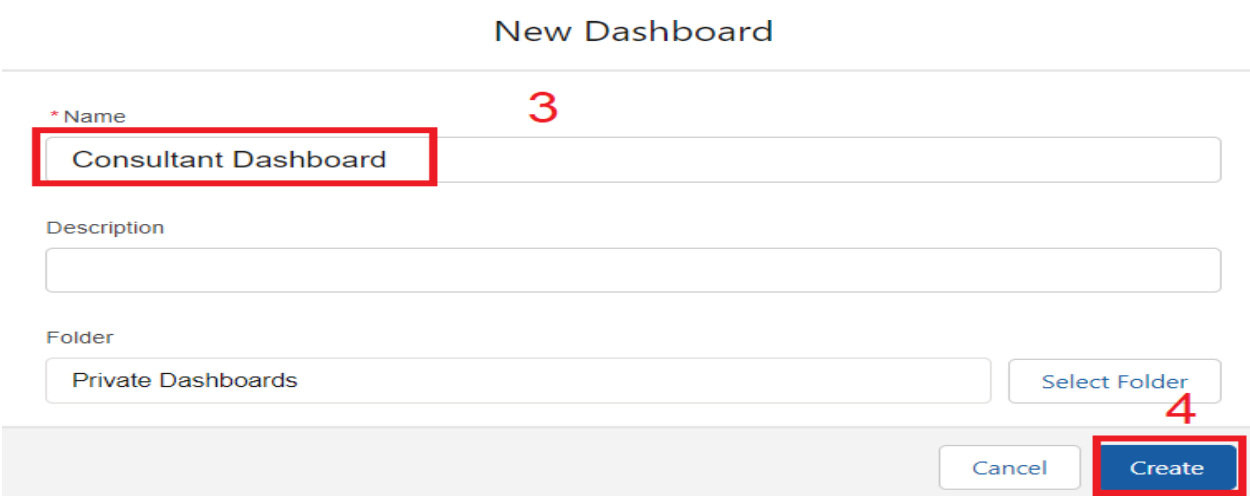
12. Dashboards

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 makeiteasyforuserstoapplydifferentdataperspectivestoasingle dashboard.

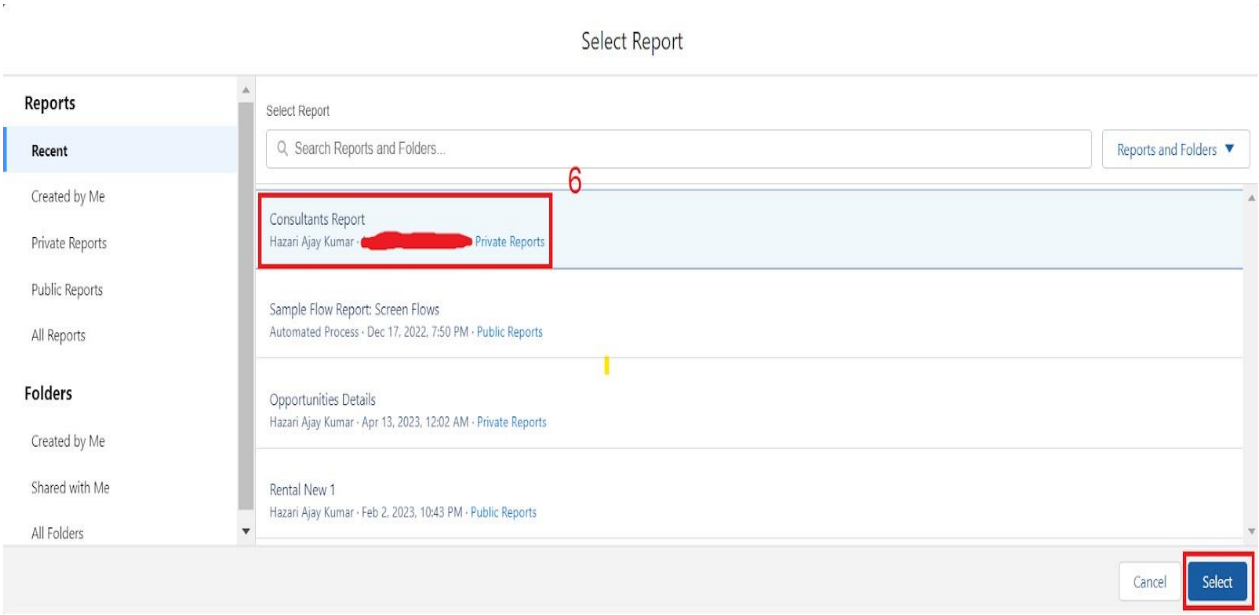
12.1. CreateDashboard

Here'sa step-by-stepguide tocreating a dashboardin theUrban Color application:

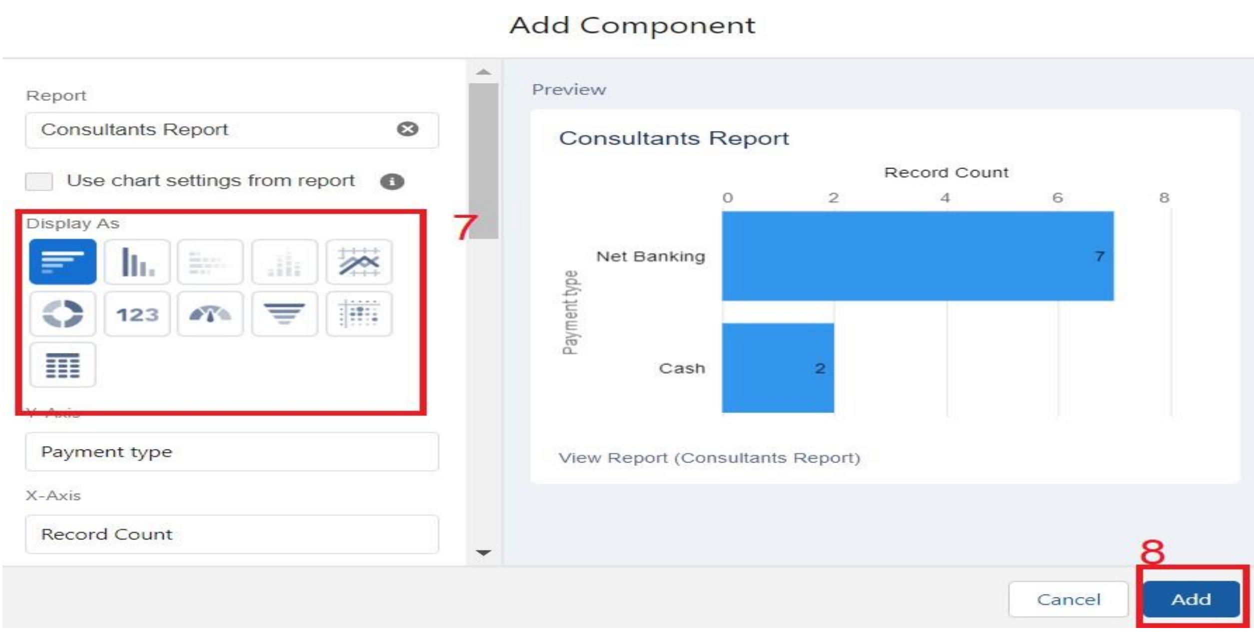
1.
2. **OpentheUrbanColorApplication**:Launchtheapplicationandnavigatetothe Dashboards tab.
3. **CreateaNewDashboard**:
   - Clickonthe"NewDashboard"button.
4. **NameYourDashboard**:
   - Enter"ConsultantDashboard"inthenamefield.
   - Click"Create."



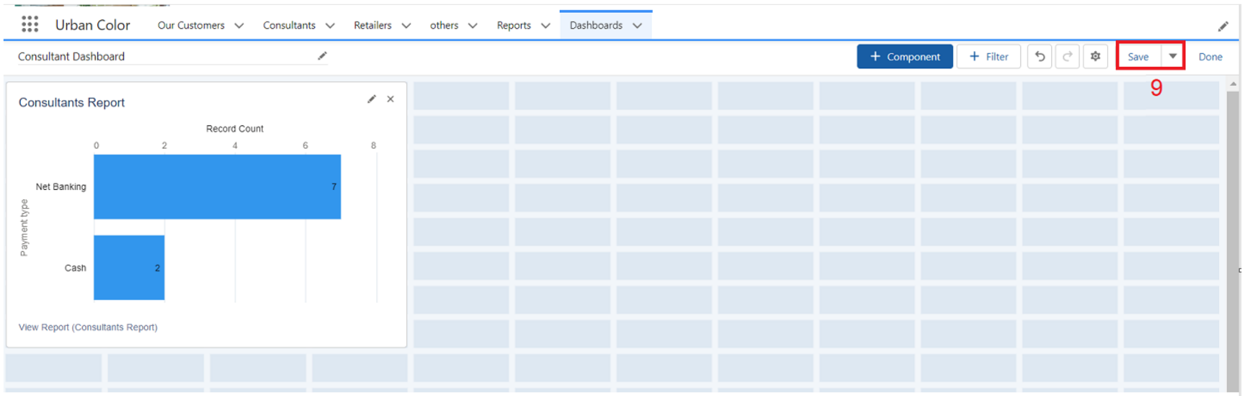
5. **AddComponentstotheDashboard**:
   - Clickon"+Component"toaddanewcomponent.
   - Selectthe"ConsultantsReport"youcreatedearlier.



6. **ChooseDataVisualization**:
   - Pickavisualizationtype(e.g.,chart,table)thatbestsuitsyourdataandneeds.
   - Click"Add."



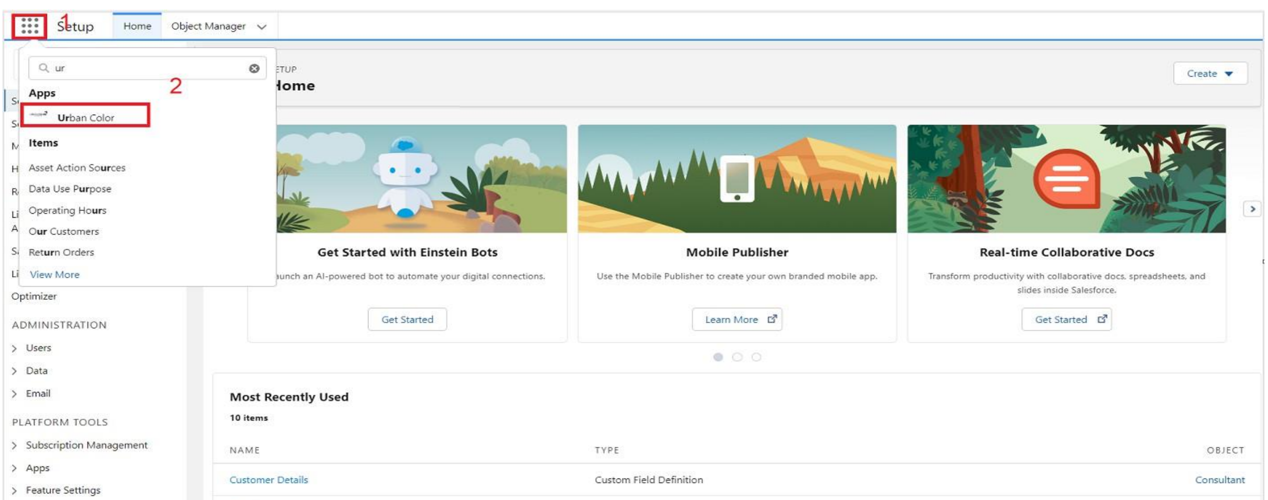
7. **SaveYourDashboard**:
   - Afterconfiguringthecomponentsandvisualizations,click"Save"tofinalizeyour dashboard.



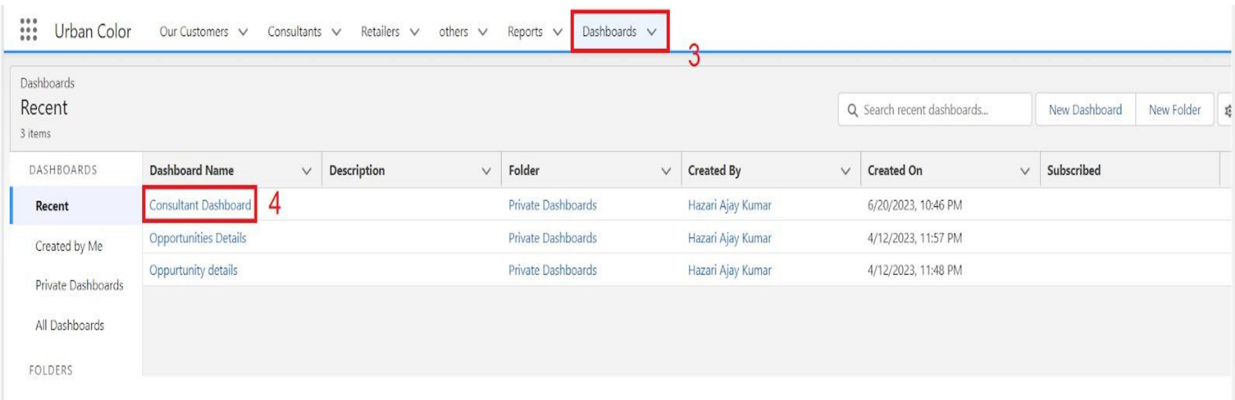
12.2. ViewDashboard

Toviewthedashboard,followthesesteps:

1. **OpentheAppLauncher**:
   - ClickontheAppLaunchericonontheleftsideofthescreen.
2. **SearchfortheDashboard**:
   - Type"CandidateInternalResultCard"intothesearchbar.
   - Clickonthe"CandidateInternalResultCard"optionthatappears.



3. **NavigatetotheDashboardTab**:
   - OnceintheCandidateInternalResultCardview,clickonthe"Dashboard"tab.
4. **Viewthe Graph**:
   - Clickonthe"CandidateInternalResultCard"toseethegraphviewoftherecords.


Urban Color
Our Customers
Consultants
Retailers
others
Reports
Dashboards
3
Dashboards
Recent
3 items
Search recent dashboards...
New Dashboard
New Folder
DASHBOARDS
Recent
Created by Me
Private Dashboards
All Dashboards
FOLDERS
Dashboard Name
Description
Folder
Created By
Created On
Subscribed
Consultant Dashboard
4
Private Dashboards
Hazari Ajay Kumar
6/20/2023, 10:46 PM
Opportunities Details
Private Dashboards
Hazari Ajay Kumar
4/12/2023, 11:57 PM
Oppurtunity details
Private Dashboards
Hazari Ajay Kumar
4/12/2023, 11:48 PM