

# Cosmetics Store Management

by,  
Gudari.Yagneswar.

## Summary :

### 1. **Key Features: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 Catalog:** Maintain an up-to-date catalog 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 analyze 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 Color, For this Urban Color we need to create 3 objects i.e .,Our Customers,Consultants,Retailers,others.

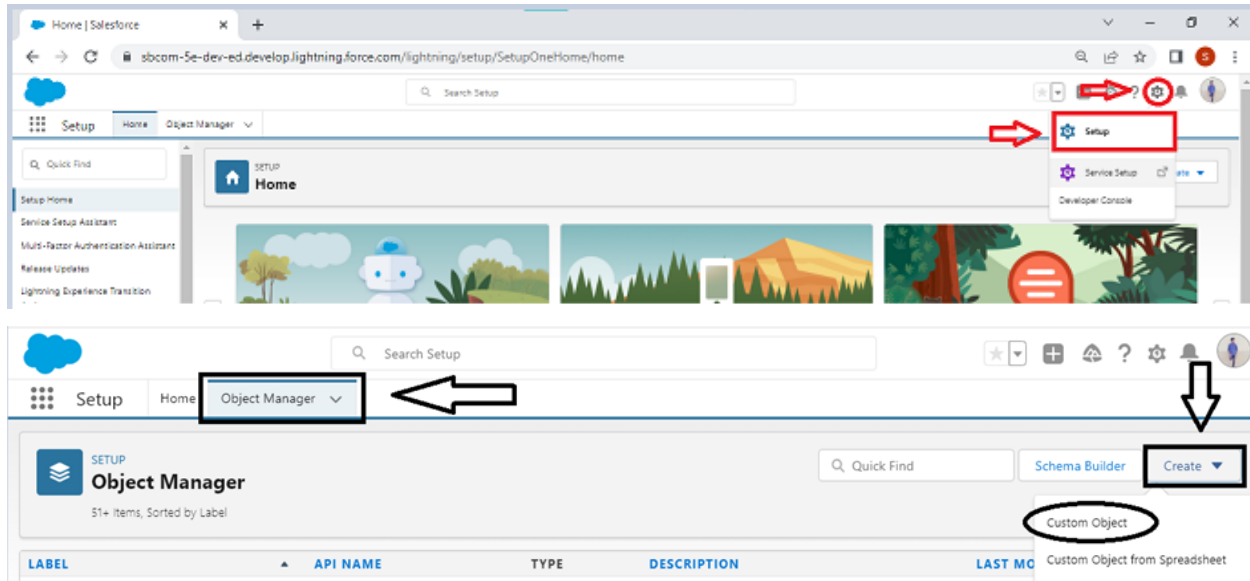
The below steps will assist you in creating those objects.

- 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.



We need to create 4 objects named Our customer,Consultant,Retailer,Others.

For creating the another 3 objects,we need t follow the same procedure as mentioned above.

After the completion of 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

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 

	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)

### 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

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.

The screenshot shows the Salesforce Object Manager interface for the 'Consultant' object. The left sidebar contains a list of options: Details, Fields & Relationships, Page Layouts (highlighted with a red box and labeled '1'), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main area is titled 'Page Layouts' and shows '1 Items, Sorted by Page Layout Name'. A table lists the available layouts:

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Consultant Layout (highlighted with a red box and labeled '2')	Hazari Ajay Kumar, 4/1/2023, 7:25 AM	Hazari Ajay Kumar, 6/18/2023, 10:30 PM

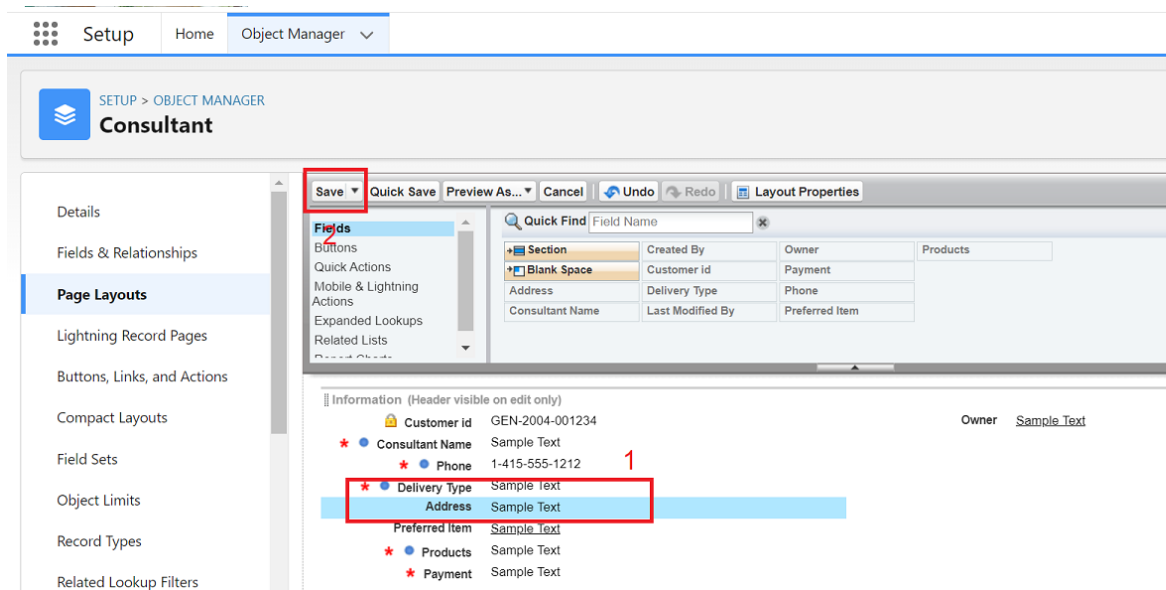
3. Click And Drag Delivery type and Address Fields Below Phone field.

The screenshot shows the Salesforce Page Layout Editor for the 'Consultant' object. The left sidebar contains a list of options: Details, Fields & Relationships, Page Layouts (highlighted), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main area is titled 'Page Layouts' and shows the layout configuration. The 'Fields' section on the left lists the available fields: Buttons, Quick Actions, Mobile & Lightning Actions, Expanded Lookups, Related Lists, and Report Charts. The 'Quick Find' field is highlighted with a red box and labeled '1'. The 'Fields' table lists the fields and their positions:

Field Name	Created By	Owner	Products
Section	Customer id	Payment	
Blank Space	Address	Delivery Type	Phone
Address	Consultant Name	Last Modified By	Preferred Item

The 'Information' section at the bottom shows the layout configuration for the 'Consultant' object. The 'Delivery Type' field is highlighted with a red box and labeled '2'.



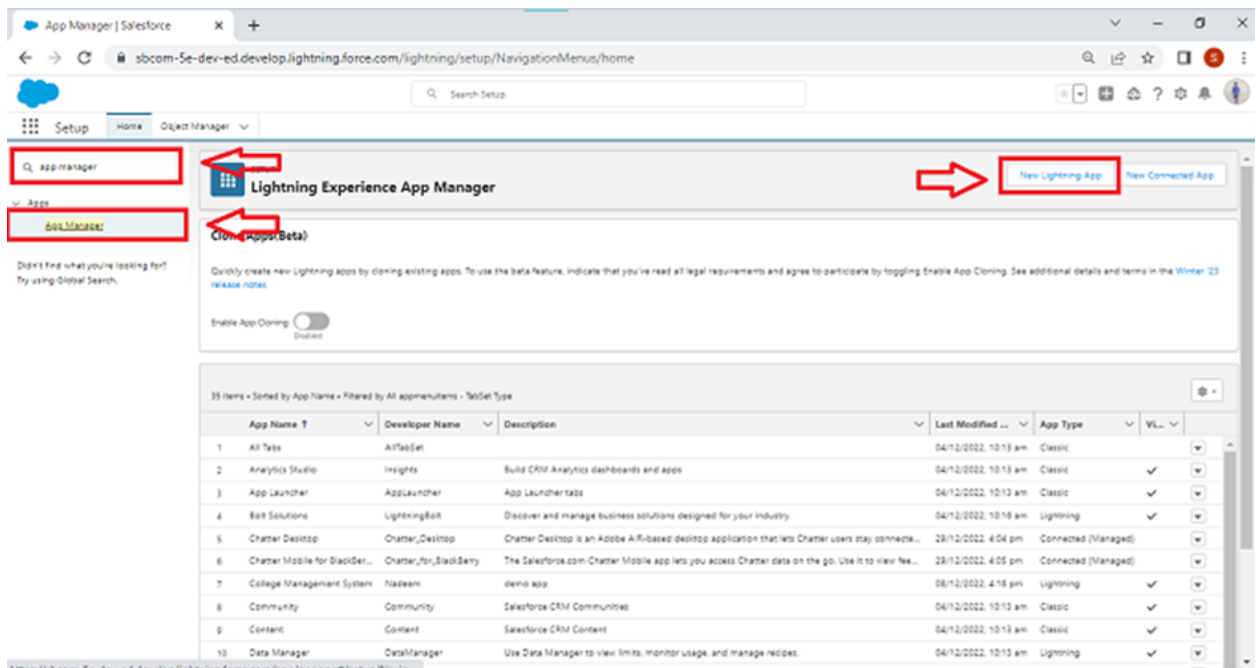


5. Click on Save

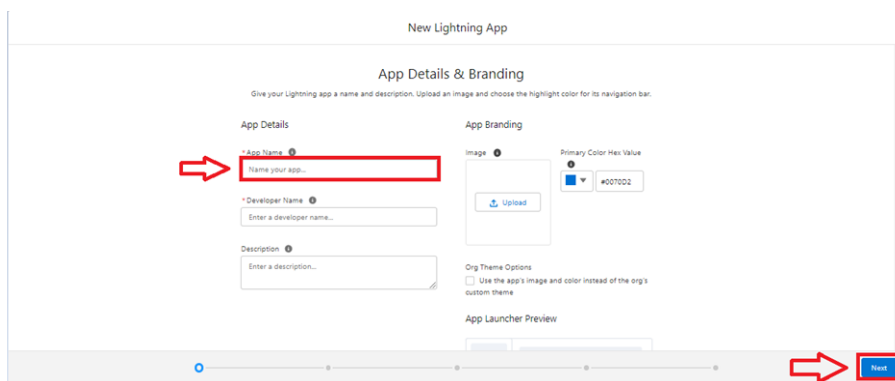
- Creating a page layout in Salesforce involves navigating to the object manager, selecting the relevant object, and either creating a new layout or editing an existing one. You can design the layout by dragging and dropping fields, adding sections and related lists, and including buttons or links as 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 :**

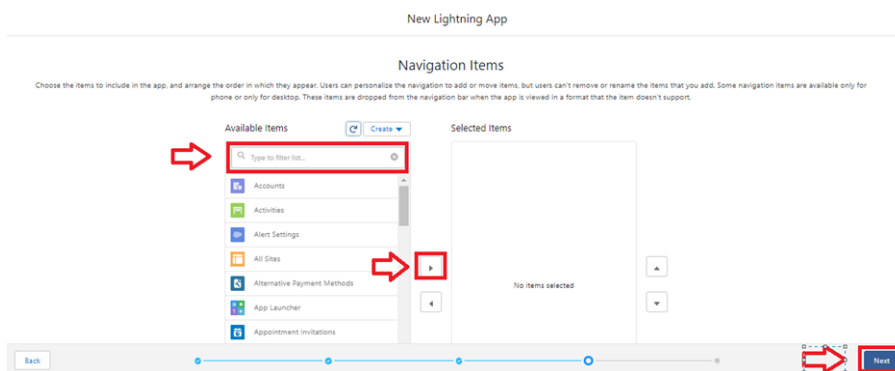
- An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar
- To create a lightning app page:
  1. Go to setup page --> search "app manager" in quick find --> select "app manager" --> click on New lightning App.



- 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.



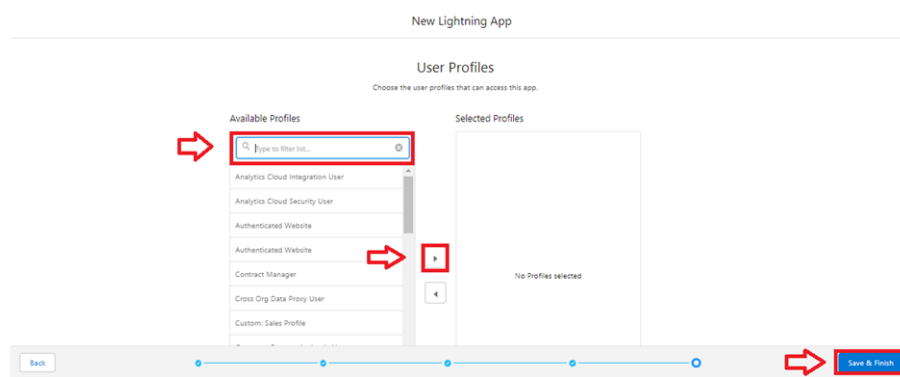
- To Add Navigation Items:



- 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:



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, Visualforce 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.

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

The screenshot shows the Salesforce Setup interface. In the left sidebar, the 'Profiles' link is selected under the 'Users' section. The main content area displays the 'Store Supervisor' profile. At the top, there's a search bar with 'prof' and a 'Profiles' header. Below the header, a description states: 'Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing the user. If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types.' A list of permissions is shown, including 'Login IP Ranges', 'Enabled Apex Class Access', 'Enabled Visualforce Page Access', 'Enabled External Data Source Access', 'Enabled External Credential Principal Access', 'Enabled Custom Metadata Type Access', 'Enabled Custom Setting Definitions Access', 'Enabled Service Presence Status Access', and 'Enabled Custom Permissions'. Below this, the 'Profile Detail' section shows the profile name 'Store Supervisor', user license 'Salesforce', and a checked 'Custom Profile' checkbox. Buttons for 'Edit', 'Clone', 'Delete', and 'View Users' are visible.

This screenshot shows the 'Edit' view of the 'Store Supervisor' profile. It displays a table of permissions with checkboxes for each. The table is organized into two columns. The first column lists standard permissions, and the second column lists custom permissions. The 'Urban Color (Urban\_Color) Default' profile is selected as the base profile. Below the table, there are sections for 'Service Provider Access' and 'Tab Settings'. A checkbox at the bottom indicates 'Overwrite users' personal tab customizations'.

Permission	Enabled	Selected
(standard__LightningSort)	<input type="checkbox"/>	<input type="checkbox"/>
Community (standard__Community)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Content (standard__Content)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Data Manager (standard__DataManager)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Digital Experiences (standard__SalesforceCMS)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Lightning Usage App (standard__LightningInstrumentation)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
LWC LEARNINGS (LWC_LEARNINGS)	<input type="checkbox"/>	<input type="checkbox"/>
Marketing (standard__Marketing)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Queue Management (standard__QueueManagement)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Rental Management (Rental_Management)	<input type="checkbox"/>	<input type="checkbox"/>
(standard__Latter)	<input type="checkbox"/>	<input type="checkbox"/>
Salesforce Scheduler Setup (standard__LightningScheduler)	<input type="checkbox"/>	<input type="checkbox"/>
Sample Console (standard__ServiceConsole)	<input type="checkbox"/>	<input type="checkbox"/>
Service (standard__Service)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Service Console (standard__LightningService)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Site.com (standard__Sites)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Subscription Management (standard__RevenueCloudConsole)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Urban Color (Urban_Color)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Vehicle Management (Vehicle_Management)	<input type="checkbox"/>	<input type="checkbox"/>
WDC (standard__Work)	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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

**SETUP**  
**Profiles**

Allow OAuth for employees ☐

### Password Policies

User passwords expire in

Enforce password history

Minimum password length

Password complexity requirement

Password question requirement

Maximum invalid login attempts

Lockout effective period

Obscure secret answer for password resets ☐

Require a minimum 1 day password lifetime ☐

Don't immediately expire links in forgot password emails ☐

**SETUP**  
**Profiles**

Clone Profile Help for this Page

Enter the name of the new profile.

**You must select an existing profile to clone from.** = Required Information

Existing Profile

User License

Profile Name

5. Click On Save.

## Task 6: Setting up Roles :

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

- Click on the Gear Icon
- Click "Setup"
- In the Quick Find box, enter "Roles"
- 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 .

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'roles' and a navigation menu with 'Users', 'Roles' (highlighted), 'Feature Settings', 'Sales', 'Service', and 'Case Teams'. The main content area is titled 'Role Edit' and 'New Role'. It contains a form with the following fields: 'Label' (Store Head), 'Role Name' (Store\_Head), 'This role reports to' (thesmartbridge.com), and 'Role Name as displayed on reports' (empty). At the bottom right are 'Save', 'Save & New', and 'Cancel' buttons.

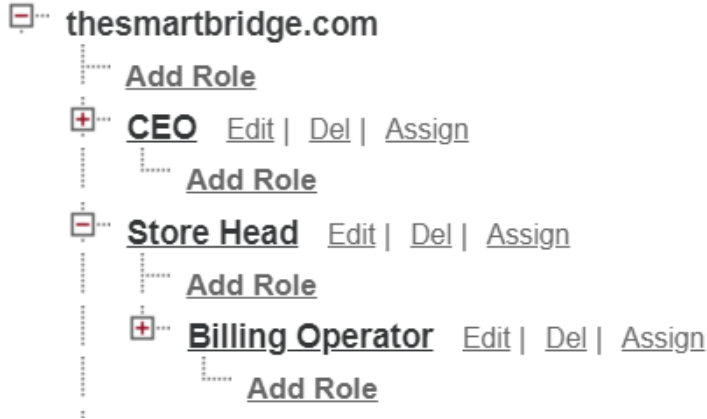
Similarly create One Roles under Store Head as Billing Operator.

This screenshot shows the same Salesforce Setup interface but with the 'New Role' form filled out for a 'Billing Operator'. The 'Label' field is 'Billing Operator', the 'Role Name' is 'Billing\_Operator', and the 'This role reports to' field is 'Store Head'. The 'Role Name as displayed on reports' field is empty. The 'Save', 'Save & New', and 'Cancel' buttons are at the bottom right. A 'Help for this Page' link is visible in the top right corner of the form area.

## Your Organization's Role Hierarchy

---

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



- In Salesforce, roles define the hierarchy and access levels for users within an organization. Roles determine the visibility of records and data sharing based on an employee's position and responsibilities. By establishing a role hierarchy, Salesforce allows users to access and manage records owned by users in roles below them in the hierarchy. This ensures that managers can oversee the work of their subordinates while maintaining data security and privacy. Roles are crucial for configuring access controls, enabling effective data sharing, and facilitating proper reporting within Salesforce.

### ► **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 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 page with the 'Users' section selected. The 'User Edit' form is displayed, showing the following information:

- General Information:**
  - First Name: Amar
  - Last Name: k
  - Alias: ak
  - Email: mailid@gmail.com
  - Username: amark2133@salesforce.cor
  - Nickname: User167161323313747430
  - Title: Store Supervisor
  - Company:
  - Department:
  - Division:
- Role and License:**
  - Role: Store Head
  - User License: Salesforce
  - Profile: Store Supervisor
- Active:** ☒
- User Types (all unchecked):**
  - 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--

The screenshot shows the Salesforce Setup page with the 'Users' section selected. The 'Single Sign On Information' form is displayed, showing the following information:

- 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:** ☐

## **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:**

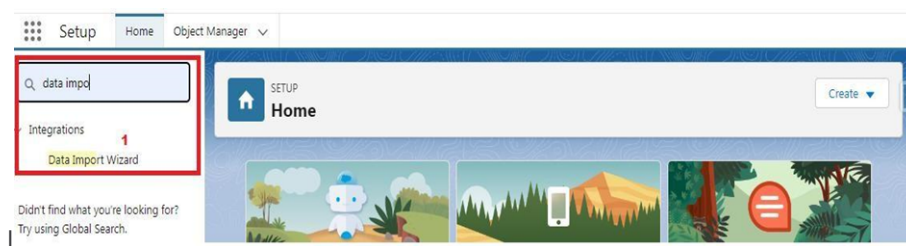
- After making the updates, click “Save” to apply and store the modifications.

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

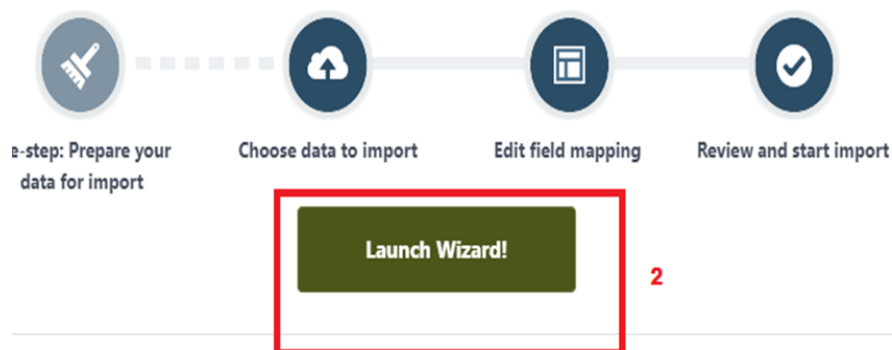
## ► **Task 9: Importing Data :**

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.

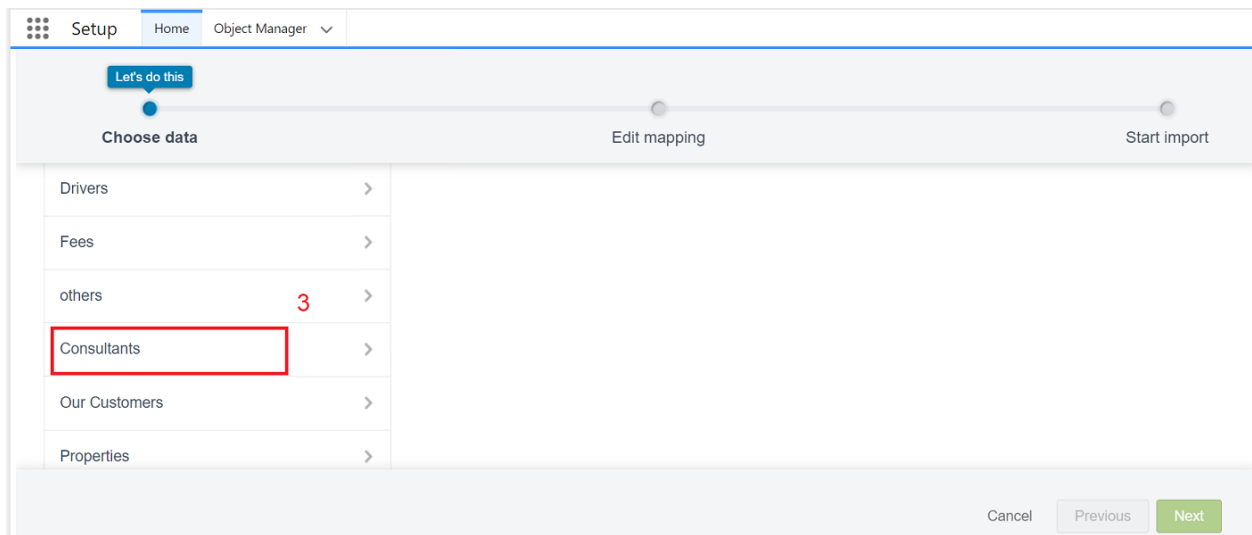
1. From Setup, click the Home tab.
2. Similarly create One Roles under Store Head as Billing Operator.



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? ?

Standard objects	Custom objects
Attendees	
Buyers	

What do you want to do? ?

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

Where is your data located? ?

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

The screenshot shows the Salesforce Setup interface in the 'Edit mapping' step. The progress bar at the top shows 'Choose data' as the first step and 'Start import' as the third. The 'What kind of data are you importing?' section shows 'Standard objects' and 'Custom objects' tabs. The 'Attendees' and 'Buyers' objects are listed. The 'What do you want to do?' section shows three options: 'Add new records' (selected with a green checkmark), 'Update existing records', and 'Add new and update existing records'. The 'Where is your data located?' section shows a 'Drag CSV file here to upload' area with a 'CSV' file icon highlighted by a red box and a red number '5'. At the bottom right, there are three buttons: 'Cancel', 'Previous', and 'Next' (highlighted with a red box).

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.

**Edit Field Mapping: Consultants**  
Your file has been auto-mapped to existing Salesforce fields, but you can edit the mappings if you wish. Unmapped fields will not be imported.

Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	Consultant Name	Consultant Name	Dev Raj	Ajith	Babu
Change	Mobile Number	Mobile Number	984638732	784853673	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

Cancel Previous **Next**

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

**Review & Start Import**  
Review your import information and click Start Import.

Your selections:

- Consultants ✓
- Add new records ✓
- Consultants - Sheet1 (2).csv ✓

Your import will include:

Mapped fields: **7**

Your import will not include:

Unmapped fields: **0**

Cancel Previous **Start Import**

9. Click OK on the popup.

**Congratulations, your import has started!**  
Click OK to view your import status on the Bulk Data Load Job page.

**OK**

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

Batches									
View Request	View Result	Batch ID	Start Time	End Time	Total Processing Time (ms)	API Active Processing Time (ms)	Apex Processing Time (ms)	Records Processed	Records Failed
<a href="#">View Request</a>	<a href="#">View Result</a>	7512w00000Xqr	6/19/2023, 11:05 PM	6/19/2023, 11:05 PM	103	52	0	9	0
								0	0
									Completed

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

**Note** - Do Field mapping carefully.

## **Task 10 :Accessing Reports :**

### Creating Report :

Click App Launcher

2.Select Urban Color App

3.Click 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.

**Setup** Home Object Manager

Search: ur

**Apps**

- Urban Color

**Items**

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

**ADMINISTRATION**

- Users
- Data
- Email

**PLATFORM TOOLS**

- Subscription Management
- Apps
- Feature Settings

**Get Started with Einstein Bots**

Launch an AI-powered bot to automate your digital connections.

**Mobile Publisher**

Use the Mobile Publisher to create your own branded mobile app.

**Real-time Collaborative Docs**

Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.

**Most Recently Used**

10 Items

NAME	TYPE	OBJECT
Customer Details	Custom Field Definition	Consultant

**REPORT** New Consultants Report Consultants

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

Update Preview Automatically

**Outline** Filters

**Groups**

GROUP ROWS

Add group...

**Columns**

Add column...

Consultant: Consultant Name

Delivery Type

Products

Payment

	Consultant: Consultant Name	Delivery Type	Products	Payment
1	Dev Raj	Self Pickup	Lipstick	Cash
2	Ajith	Courier	Compact	Upi
3	Babu	Self Pickup	Face Pack	Credit Card
4	Chitra	Courier	Eye Liner	Debit Card
5	Swathi	Courier	Nail Polish	Upi
6	Prasad	Self Pickup	Eye Liner	Upi
7	Ajay Kumar	Courier	Lip Balm	Debit Card
8	Shankar	Self Pickup	Face Pack	Cash
9	Sandeep	Courier	Eye Liner	Upi

**REPORT** New Consultants Report Consultants

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

Update Preview Automatically

**Outline** Filters

**Groups**

GROUP ROWS

Add group...

**Columns**

Add column...

Consultant: Consultant Name

Delivery Type

Products

Payment

	Consultant: Consultant Name	Delivery Type	Products	Payment
1	Dev Raj	Self Pickup	Lipstick	Cash
2	Ajith	Courier	Compact	Upi
3	Babu	Self Pickup	Face Pack	Credit Card
4	Chitra	Courier	Eye Liner	Debit Card
5	Swathi	Courier	Nail Polish	Upi
6	Prasad	Self Pickup	Eye Liner	Upi
7	Ajay Kumar	Courier	Lip Balm	Debit Card
8	Shankar	Self Pickup	Face Pack	Cash
9	Sandeep	Courier	Eye Liner	Upi

Sort Ascending

Sort Descending

Group Rows by This Field

Group Columns by This Field

Bucket This Column

Show Unique Count

Move Left

Move Right

Remove Column

Edit Bucket Column

\* Field

Payment

×

\* Bucket Name

Payment type

All Values (4)

Unbucketed Values (4)

☐ Bucket remaining values as Other

Add Bucket

Search Values

☐ VALUE

BUCKET

☐ Credit Card

☐ Debit Card

☐ Upi

☐ Cash

Move To

Cancel

Apply

Edit Bucket Column

\* Field

Payment

×

\* Bucket Name

Payment type

All Values (4)

Unbucketed Values (4)

☐ Bucket remaining values as Other

Add Bucket

Search Values

☐ VALUE

BUCKET

☐ Credit Card

☐ Debit Card

☐ Upi

☐ Cash

Move To

Cancel

Apply

Edit Bucket Column

\* Field

Payment

X

\* Bucket Name

Payment type

All Values (4)

Net Banking (0)

Cash (0)

Unbucketed Values (4)

☐ Bucket remaining values as Other

Add Bucket

Search Values

VALUE

BUCKET

Credit Card

Debit Card

UPI

Cash

Move To

Cancel

Apply

Edit Bucket Column

\* Field

Payment

X

\* Bucket Name

Payment type

All Values (4)

Net Banking (0)

Cash (0)

Unbucketed Values (4)

☐ Bucket remaining values as Other

Add Bucket

Search Values

VALUE

BUCKET

☒ Credit Card

☒ Debit Card

☒ UPI

☐ Cash

Move To



### Edit Bucket Column

\* Field:

\* Bucket Name:

**All Values (4)**

- Net Banking (3)
- Cash (0)
- Unbucketed Values (1)

☐ Bucket remaining values as Other

Search Values

VALUE	BUCKET
<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	

### Edit Bucket Column

\* Field:

\* Bucket Name:

**All Values (4)**

- Net Banking (3)
- Cash (1)**
- Unbucketed Values (0)

☐ Bucket remaining values as Other

Search Values

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

14.In Group Rows Add Payment Type Bucket Field.

15. Click refresh

16. Click Save and Run

17. Give report name – Consultant report

18. Click Save

REPORT ▾  
New Consultants Report ✎ Consultants

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

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

REPORT ▾  
New Consultants Report ✎ Consultants

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

Payment type	Consultant: Consultant Name	Delivery Type	Products	Payment
Net Banking (7)	Ajith	Courier	Compact	Upi
	Babu	Self Pickup	Face Pack	Credit Card
	Chitra	Courier	Eye Liner	Debit Card
	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 <sup>1</sup>

Report Unique Name <sup>1</sup>

Report Description

Folder <sup>2</sup>

3

## View Reports :

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

The screenshot shows the Salesforce interface. The top part shows the 'Save Report' dialog with the following details:

- \* Report Name:** Consultants Report
- Report Unique Name:** Consultants\_Report\_hvb
- Report Description:** (Empty)
- Folder:** Private Reports
- Buttons:** Cancel, Save

The bottom part shows the 'View Reports' screen. The left sidebar shows the 'Apps' menu with 'Urban Color' selected. The main content area shows the 'Reports' tab for the 'Urban Color' app. The 'Recent' reports list is as follows:

Report Name	Description	Folder	Created By	Created On	Subscribed
Consultants Report		Private Reports	Hazari Ajay Kumar	12/17/2023, 7:50 PM	
Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	4/12/2023, 11:46 PM	
Opportunities Details		Private Reports	Hazari Ajay Kumar	2/2/2023, 10:39 PM	
Rental New 1		Public Reports	Hazari Ajay Kumar		

## Task 11 : Working with dashboards :

### 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.

### New Dashboard

\* Name 3

Consultant Dashboard

Description

Folder

Private Dashboards

Select Folder

4

Cancel

Create

Select Report

**Reports**

**Recent**

Created by Me

Private Reports

Public Reports

All Reports

**Folders**

Created by Me

Shared with Me

All Folders

Select Report

Q Search Reports and Folders... Reports and Folders ▾

Consultants Report

6

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

Cancel

Select

## Add Component

Report

Consultants Report

☐ Use chart settings from report

Display As

Payment type

X-Axis

Record Count

Preview

Consultants Report

Record Count

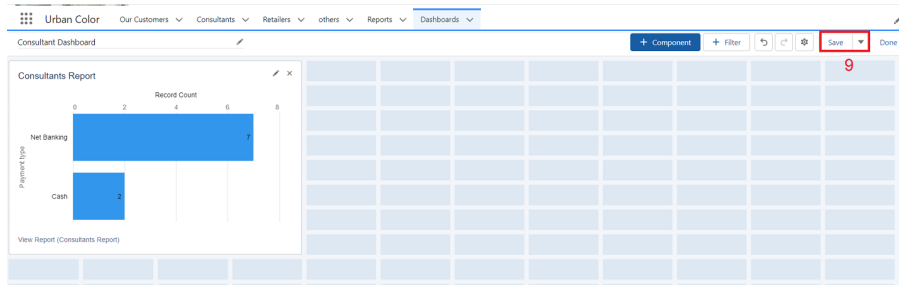
Payment type

Net Banking 7

Cash 2

View Report (Consultants Report)

Cancel Add



## 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

Setup Home Object Manager

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

Home

Get Started

Learn More

Real-time Collaborative Docs

Get Started

Most Recently Used

10 items

NAME	TYPE	OBJECT
Customer Details	Custom Field Definition	Consultant

Urban Color

Our Customers

Consultants

Retailers

others

Reports

Dashboards

Dashboards

Recent

3 items

Q

Search recent dashboards...

New Dashboard

New Folder

g

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	Opportunity details		Private Dashboards	Hazari Ajay Kumar	4/12/2023, 11:49 PM	
All Dashboards						
FOLDERS						







































