Cosmetics Store Management

Description :

Cosmetics Store Management in Salesforce is a solution that helps cosmetic storemanage 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 :

1. **Key Features:Customer Management:**
   a. **Contacts & Accounts:**Efficiently managecustomer details, includingcontact information, purchase history, and preferences.
   b. **Customer Segmentation:** Segment customers basedon various criteriasuch as purchase frequency, product preference, and location for targeted marketing.
2. **Product Management:**
   a. **Product Catalog:** Maintain an up-to-date catalog of cosmeticproducts with detaileddescriptions, pricing, and availability.
   b. **Inventory Tracking:** Monitor stock levels,set reorder points,and track inventoryturnover to ensure optimal stock levels.
3. **Sales Management:**
   a. **Order Processing:** Automate the ordermanagement process, including order creation, statustracking, and invoicing.
   b. **Sales Analytics:** Generate reports and dashboards to analyze sales trends, identify top-selling products, and forecast future sales.
4. **Marketing & Promotions:**
   a. **Campaign Management:** Create and managemarketing campaigns, including email promotions, discounts, and special offers.
   b. **Customer Engagement:** Use Salesforce tools to engagewith customers throughpersonalized offers and targeted marketing.
5. **Customer Service:**
   a. **Case Management:** Track and resolvecustomer service issuesand complaints efficiently.
   b. **Knowledge Base:** Provide customers with access to a self-service portal for FAQs,product information, and troubleshooting.
6. **Integration & Automation:**

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

TASKS :

1.Creating the Objects :

To Create an object:

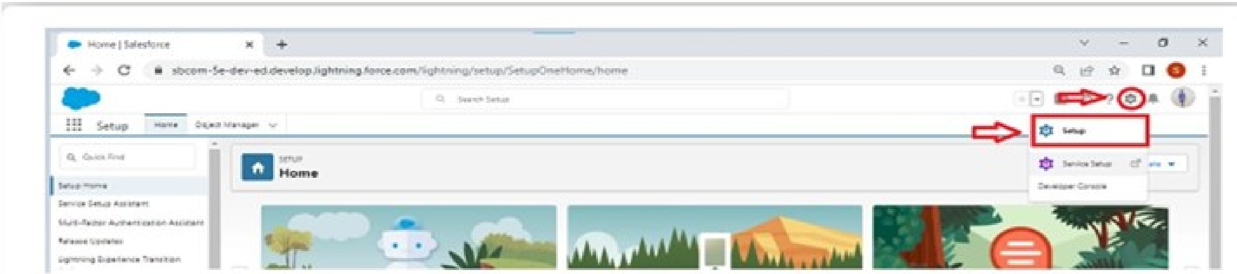
Creation of Objects for Urban Color,For this Urban Color we need to create 3 objects i.e .,Our Customers,Consultants,Retailers,others.
The below steps will assist you in creatingthose objects.

1. Clickon the gear icon and then selectSetup.
2. Clickon the object manager tab just besidethe home tab.
3. After the above steps, have a look on the extreme right you will find a CreateDropdown click on that and select Custom Object.

Creation of Our CustomerObject

On the CustomObject Definition page, create the object as follows:

1. Label: Our Customer
2. Plural Label: Our Customers
3. Record Name: Our Customer
4. Checkthe Allow Reportscheckbox
5. Checkthe Allow Search checkbox
6. ClickSave.
7. Nowcreate a custom tab. Click the Home tab, enter Tabs in QuickFind and select Tabs.
8. UnderCustom Object Tabs, click New.
9. ForObject, select Our Customer.
10. ForTab Style, select any icon.
11. Leaveall defaults as is. ClickNext, Next, and Save.



We need to create 4 objects namedOur customer, Consultant, Retailer,Others.
For creating the another 3objects, we need t followthe same

procedureas mentioned above. After the completion of object creation

task, We'll move on to further steps.

Task2 :

Creating Fields and Relationship :

1. An object relationship in Salesforce is a two-way association betweentwo objects. Relationships are created by creating custom relationship fields on an object. This is done so that whenusers 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 objectsfollow 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 Retailersobjects

Fields in Retailers objectsfollow 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

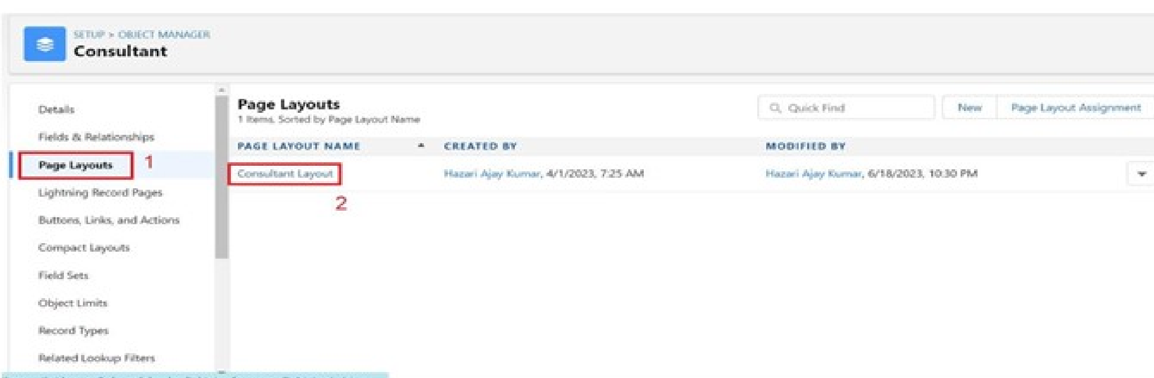
Fields in Others objectsfollow below data types:

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

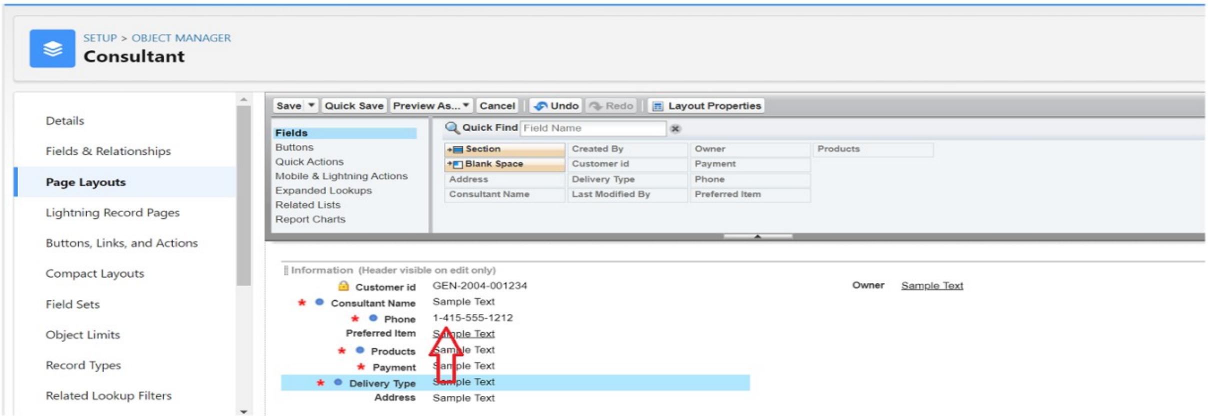
1. In the CosmeticStore Management System built onSalesforce, fields and relationships are designed to streamline operations and enhance data management. Key fields include customer details (e.g., contact information and purchase history), product specifics (e.g., SKU, price, and inventory levels), order 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:

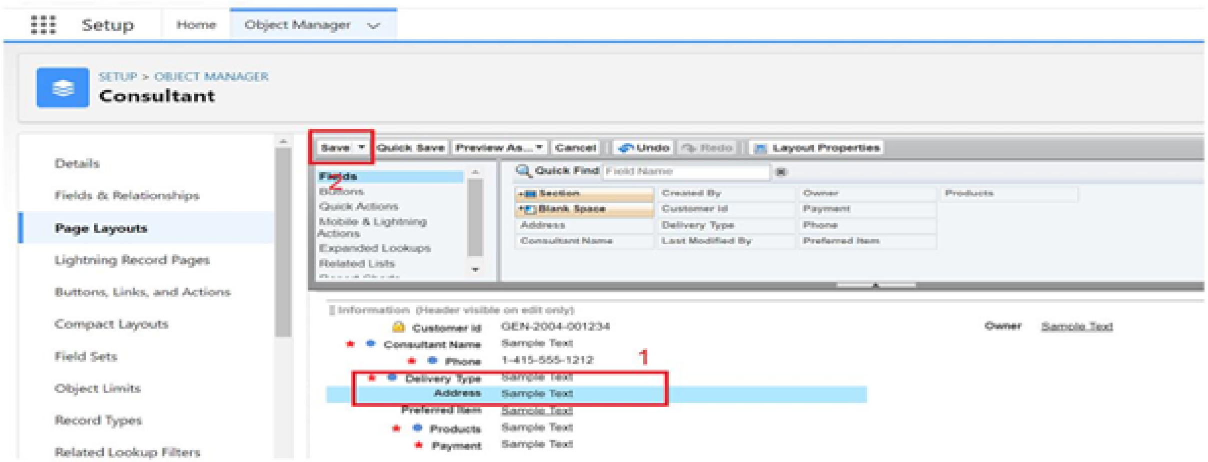
1. Fromthe Salesforce setup menu, go to "Object Manager" and select the Consultants object.
2. Clickon "Page Layouts" in the left sidebar. This will display a list of available page layouts for the selectedobject.
3. Select the Consultant Layout page layout.



4.Click and Drag Delivery Type and Address Flieds Below Phone Fields.



5.Click on Save.



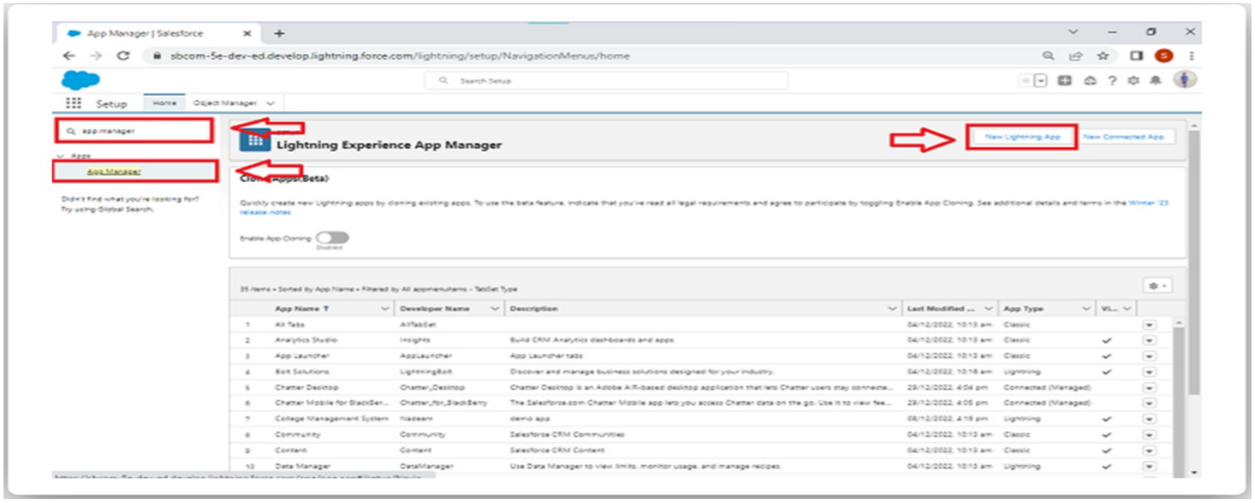
a. Creating a page layout in Salesforce involves navigating to the object manager, selecting the relevant object, and either creating a new layout or editing an existing one. You can design the layout by dragging and dropping fields, adding sections and related lists, and including buttons or links as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

➤ **<u>Task 4 : Creation of a Lightning App :</u>**

b. 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

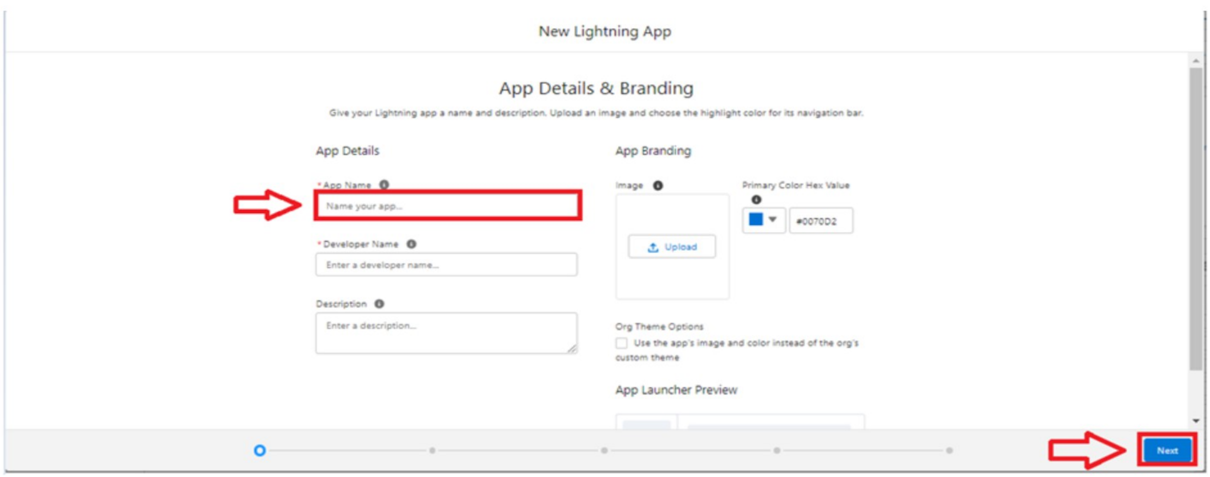
c. To createa lightning app page:

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

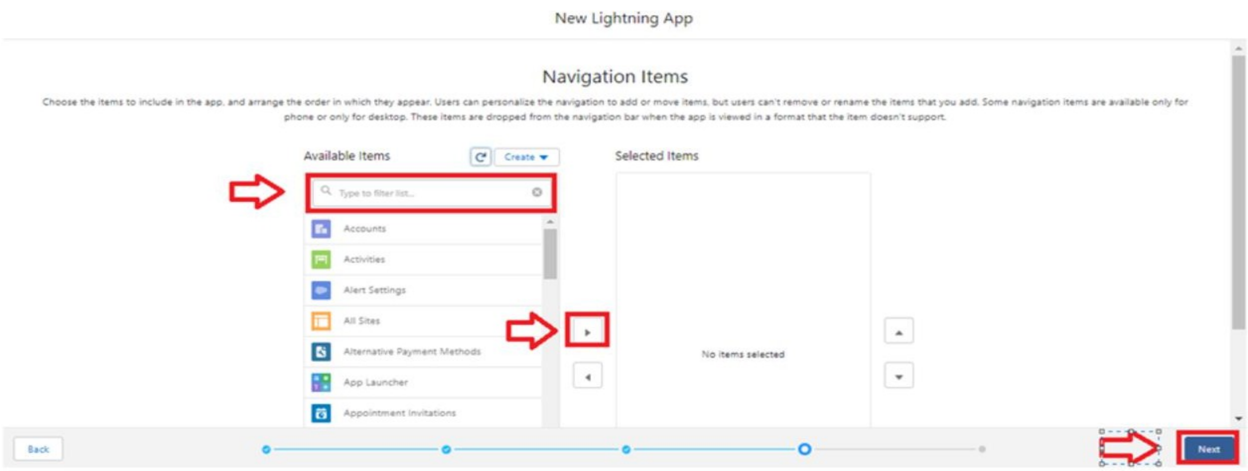


2. Fillthe app name as Urban Color in app detailsand branding -->Next --> (App option page) keep it as default--> Next -

-> (UtilityItems) keep it as default--> Next

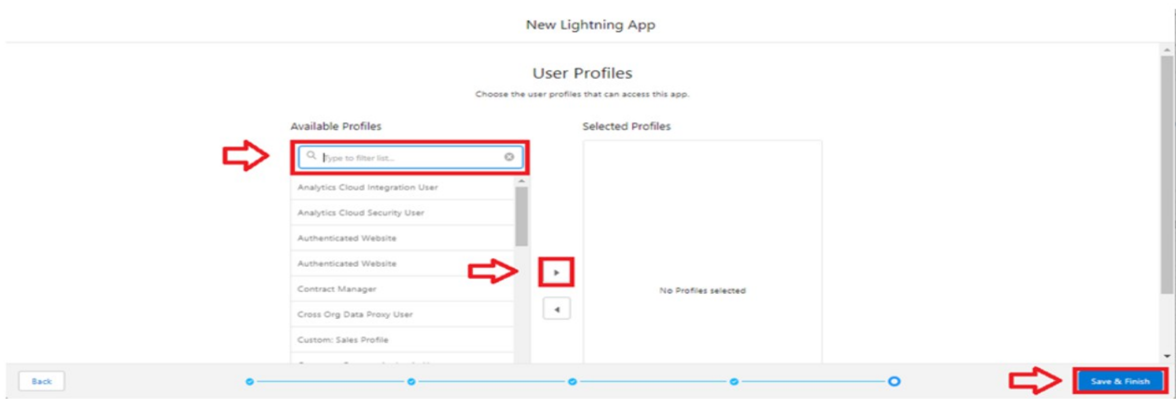


3. ToAdd Navigation Items:



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

5.ToAdd User Profiles:

1. 

2. *Search profiles(System administrator) in the searchbar --> click on the arrow button--> save & finish.*

➤ **Task 5: Creating Profiles:**

a. 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.

b. From Setup enter Profilesin the Quick Find box, and selectProfiles.

c. Fromthe list of profiles, find Standard User.

d. ClickClone.

e. ForProfile Name, enterStore Supervisor.

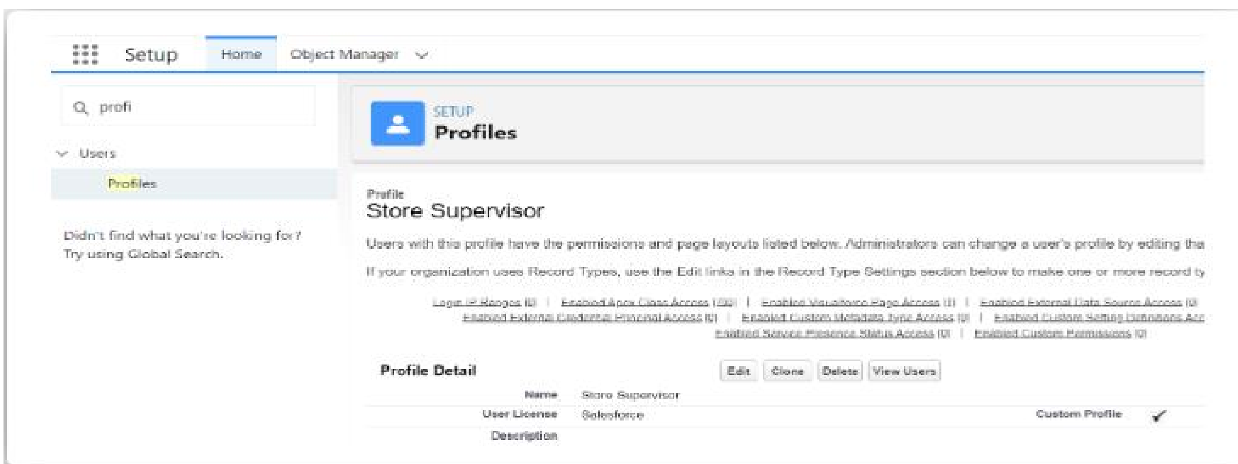
f. ClickSave.

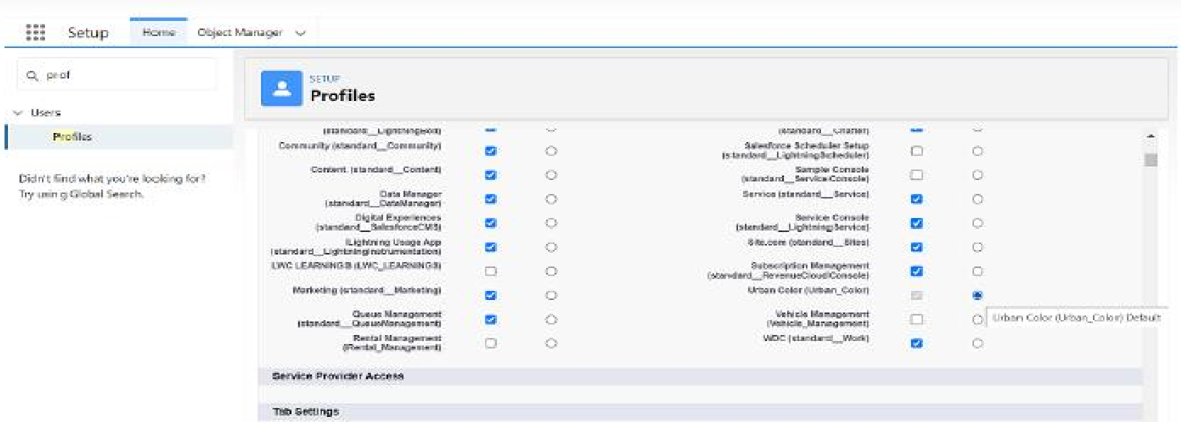
g. Whilestill on the Store Supervisor profile page, then click Edit.

h. Scroll down to Custom Object Permissions and give accessfor Create,Read,Edit,Delete,View all and modify all for Our Customers,Consultants,Retailers,Others.

i. 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.





3. Scroll down to the Custom object permission and give all access to the Consultants,

Others,Our Customers, Retailers object.

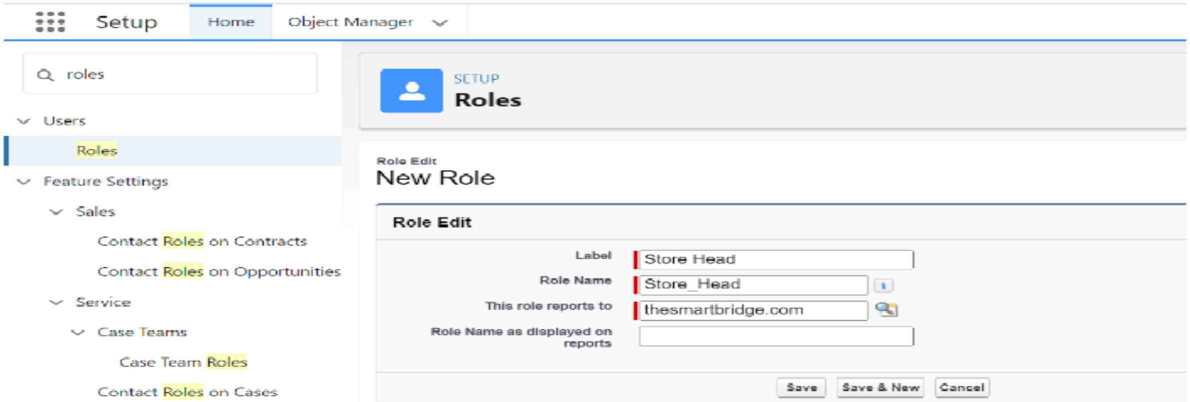
4. Click on Save.

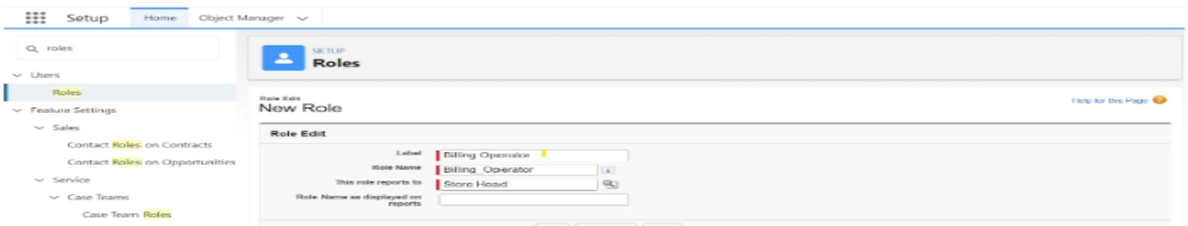
5. Similarly Createoperator profile ,CloneSalesforce Platform user and give access only for BillingOperator.

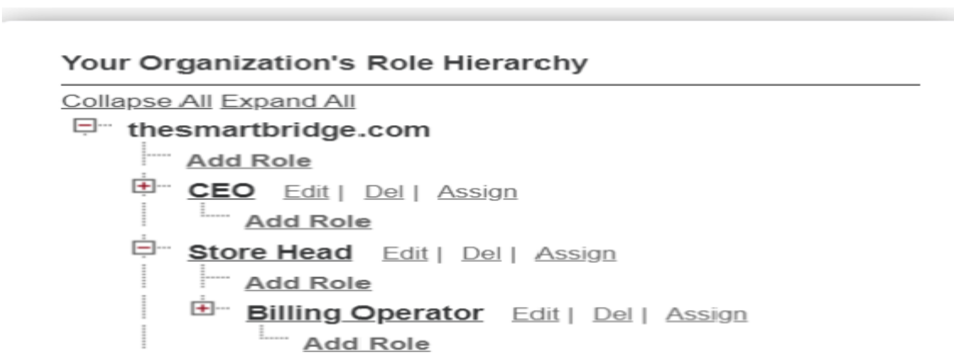
Task 6: Setting up Roles :

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

1. Clickon the Gear Icon
2. Click"Setup"
3. In the Quick Find box, enter "Roles"
4. Click"Roles"
5. Clickon "Set Up Roles"
6. Click "Expand All"
7. Underthe CEO, click on "AddRole"
8. Fillup the Label as Store Head, Role Name Store_Head.
9. Entera Role name that will be displayedon Reports.







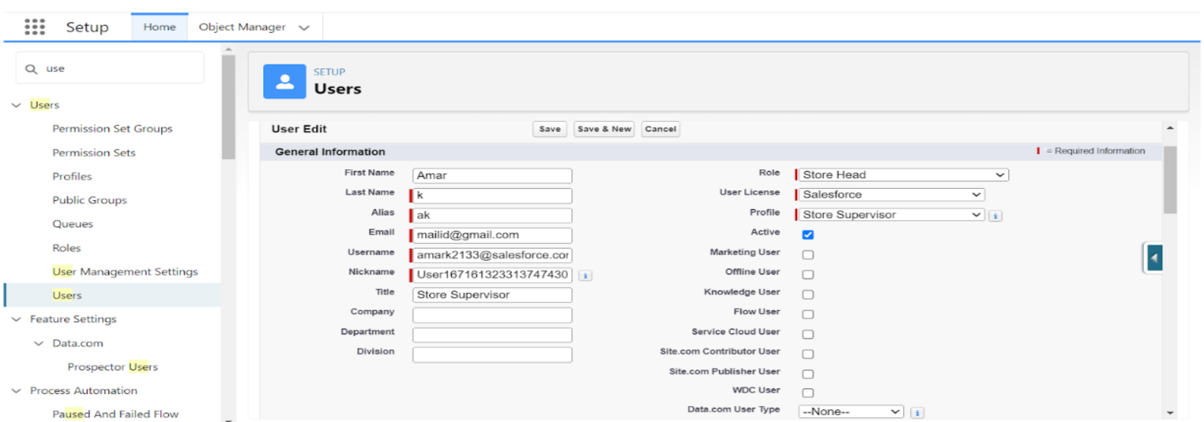
a. In Salesforce, roles define the hierarchy and access levels for users within an organization. Roles determine the visibility of records and data sharing based onan employee's position and responsibilities. By establishing a role hierarchy, Salesforce allows users to access and manage records owned by users in roles below them in the hierarchy. This ensuresthat managers can overseethe 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.

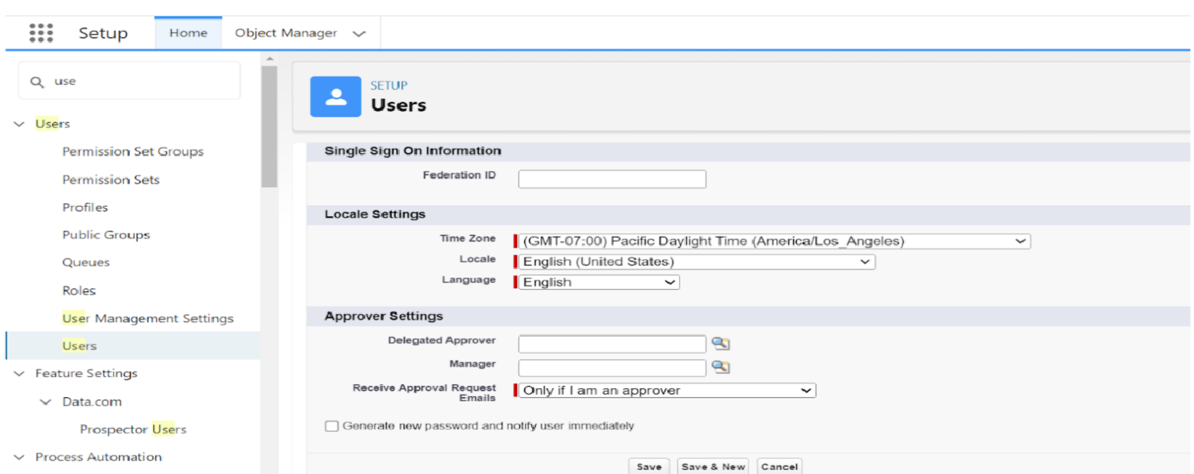
➤ **Task 7 : Creation of an User :**

b. 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 accessto various featuresand data, ensuring that users can efficiently and securely perform their job functions.

1. FromSetup, in the Quick Find box, enterUsers, and then select Users.
2. ClickNew 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 LicenceAs Salesforce.
6. Select a profile as Store Supervisor.
7. Check Generatenew password and notify the userimmediately to have the user's login name and a temporary password emailed to your email.

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





Task 8 : Creating/Modifying Records :

a. Creating or modifying records in Salesforce involves navigating to the relevant object tab, clicking “New” to create a recordor “Edit” to updatean existing one. For creatingrecords, users fill out the necessaryfields 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 ObjectTab:**

   a. Log in to Salesforce and go to the relevantobject tab (e.g., Accounts,Contacts, Opportunities).

2. **Click “New”:**

   a. On the object’s home page or list view, click the “New” button to initiatethe creation of a new record.

3. **Enter RecordInformation:**

   a. Complete the fields in the record form with the requiredand optional data. This mayinclude details like names, addresses, dates, and other relevant information.

4. **Save the Record:**

   a. Once all necessary information is entered, click “Save” to createand store the new recordin Salesforce.

Steps to Modifya Record:

1. **Find the Record:**

   a. Locate the record you want to modify by using the object’s list view, search function, or relatedlists.

2. **Open the Record:**

   a. Click on the record’sname to open it and view its details.

3. **Click “Edit”:**

   a. In the record’s detailview, click the “Edit”button to enable editing mode.

4. Update RecordInformation:

a. Make the necessary changesto the fields as required. Ensure all requiredfields are correctlyfilled out.

5. Save the Changes:

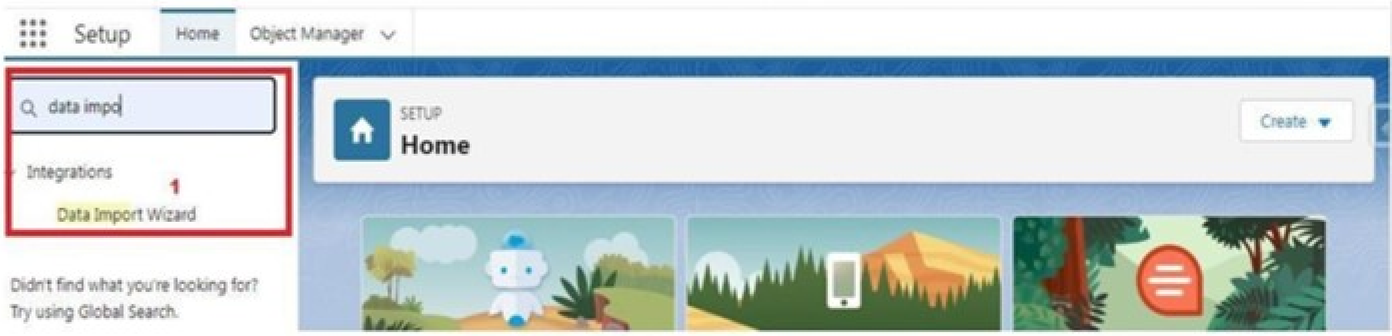
a. After making the updates,click “Save” to apply and store the modifications.

These steps ensure that recordsare properly createdand updated, maintaining accurate and current data in Salesforce.

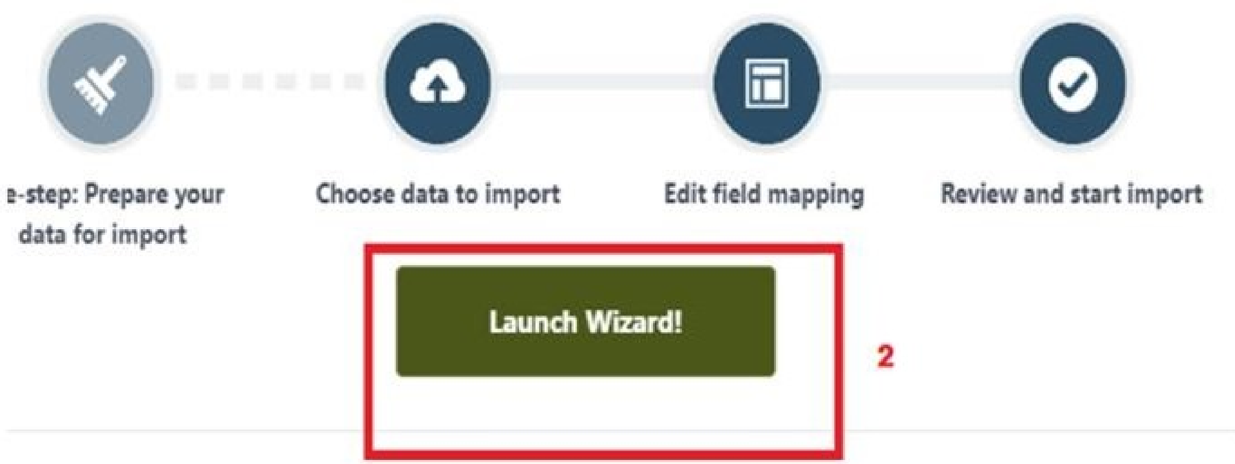
➤ Task 9: Importing Data :

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.

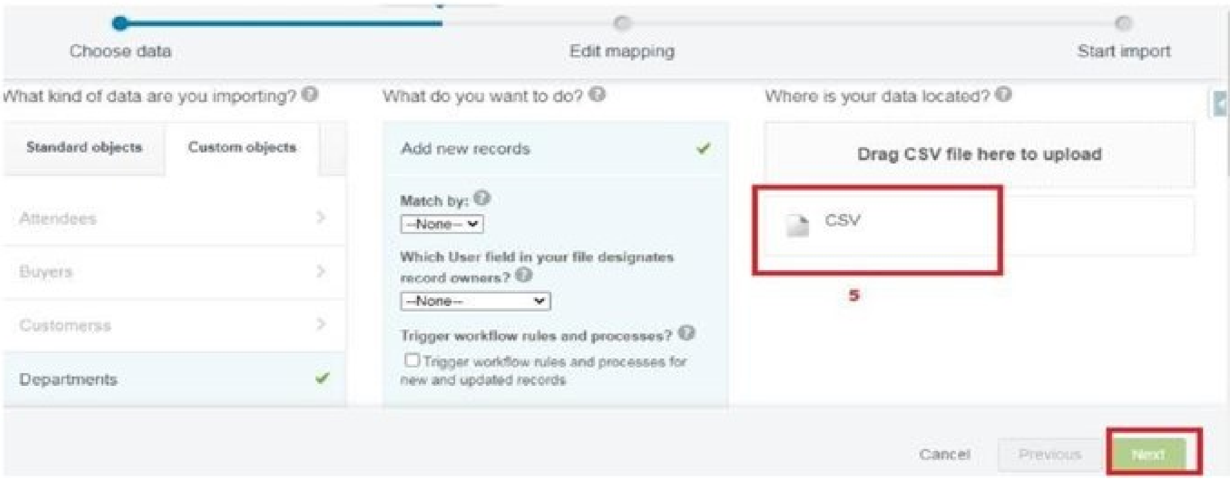
1. From Setup,click the Home tab.
2. In the Quick Find box, enter Data Importand select Data Import Wizard.



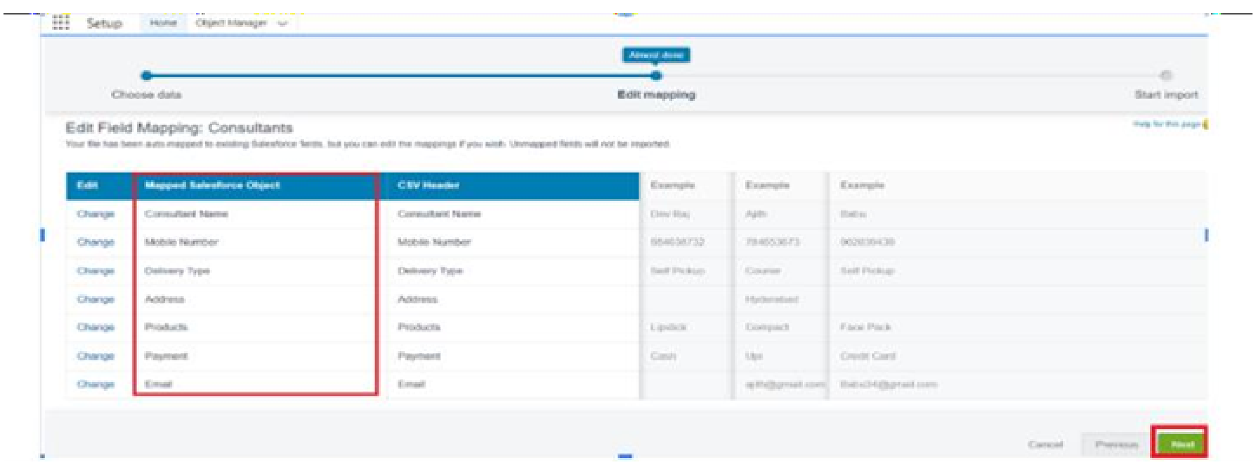
3. ClickLaunch Wizard!



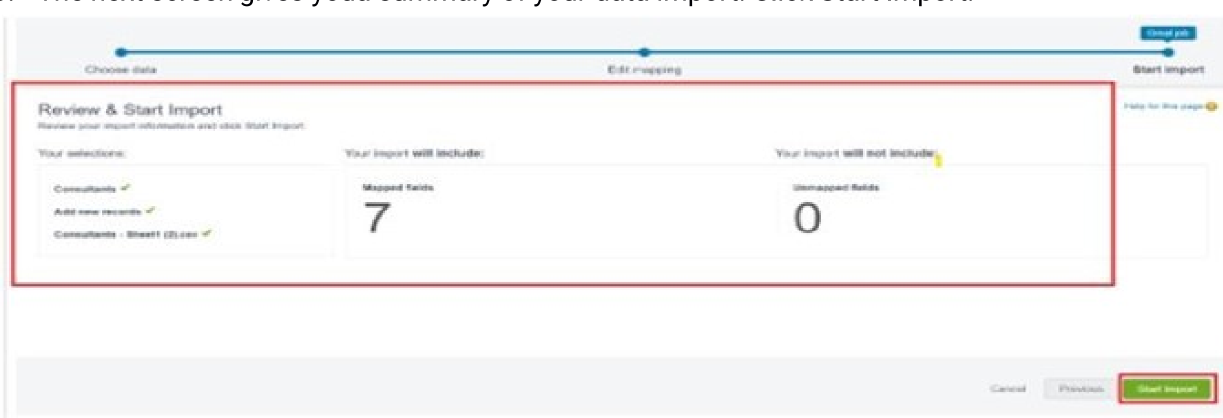
4. Clickthe Custom Objectstab and select the Consultant object.
5. Select Add new records.
6. ClickCSV and choose file Consultant_CSV which we made earlier.Click Next.



7. Sincethe 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.



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



9. Click OK on the popup.

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

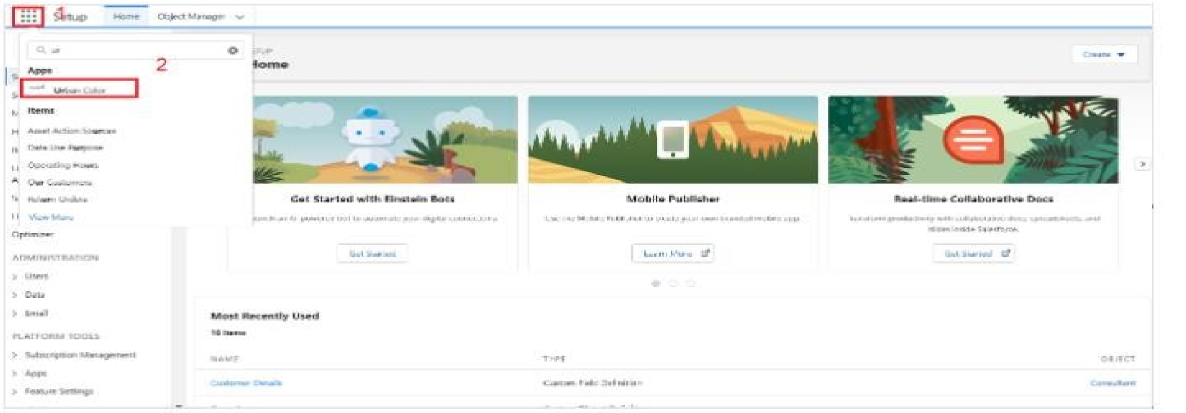
11. Makesure you have 0 recordsunder the records failed column.

Note - Do Field mappingcarefully.

➢ **Task 10 :Accessing Reports :**

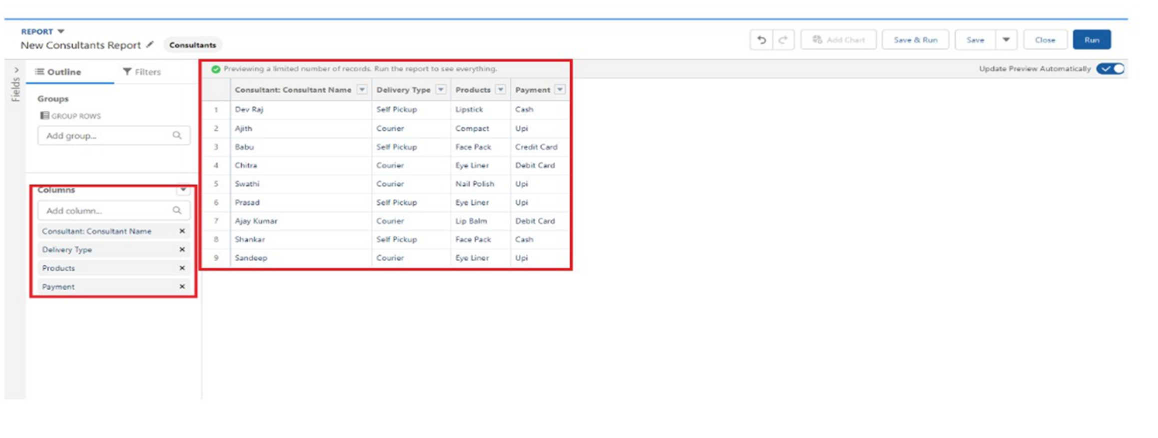
Creating Report **:**

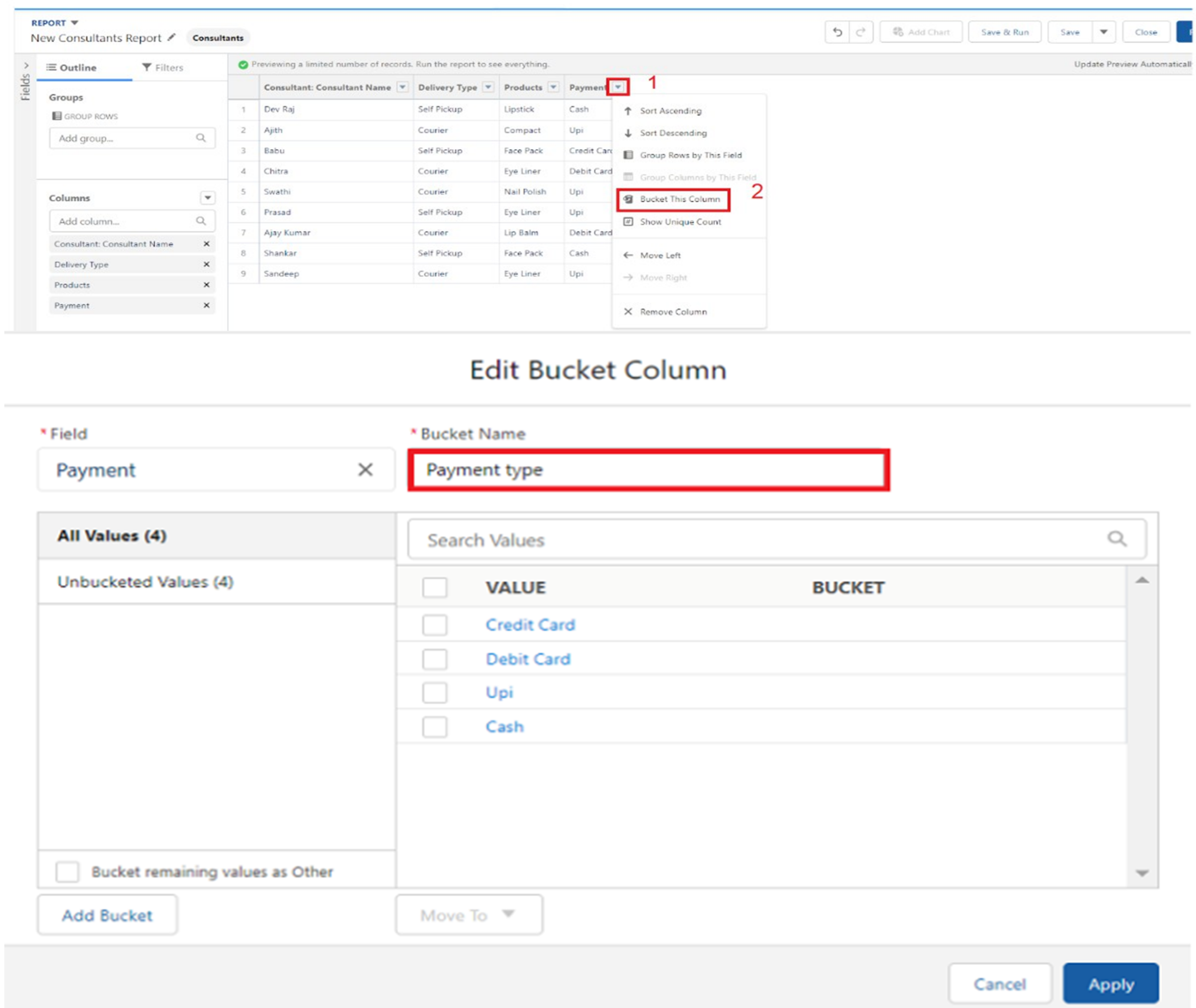
a. Click App Launcher
b. Select UrbanColor App
c. Click reportstab
d. Click New Report.
e. Click the report type as Consultants Click Start report.
f. Customize your report, in Columns select- ConsultantName,Delivery type,Products,Payment.
g. Click on the drop down optionon the payment column and selectBucket this column.
h. Bucket Name as Paymenttype
i. Click on Add Bucketand name it as NetBanking
j. Click on Add Bucketand name it as Cash
k. Now Click on All Values and select Credit card,Debit card,Upi and Move to Net Banking.
l. Now Click on All Values again and selectCash and Move to Cash.
m. Click on Apply.



1
Setup
Home
Object Manager
2
Apps
Urban Color
Items
Get Started with Einstein Bots
Mobile Publisher
Real-time Collaborative Docs
Most Recently Used
ADMINISTRATION
Users
Data
Email
PLATFORM TOOLS
Subscription Management
Apps
Feature Settings

Urban Color
Reports
1
Recent
2
Report Name
Description
Folder
Created By
Created On


REPORT
New Consultants Report
Consultants
Add Chart
Save & Run
Save
Close
Run
Outline
Filters
Fields
Groups
GROUP ROWS
Add group...
Columns
Add column...
Consultant: Consultant Name
Delivery Type
Products
Payment
Previewing a limited number of records. Run the report to see everything.
Update Preview Automatically
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
Add Chart
Save & Run
Save
Close
Outline
Filters
Fields
Groups
GROUP ROWS
Add group...
Columns
Add column...
Consultant: Consultant Name
Delivery Type
Products
Payment
Previewing a limited number of records. Run the report to see everything.
Update Preview Automaticall
Consultant: Consultant Name | Delivery Type | Products | Payment
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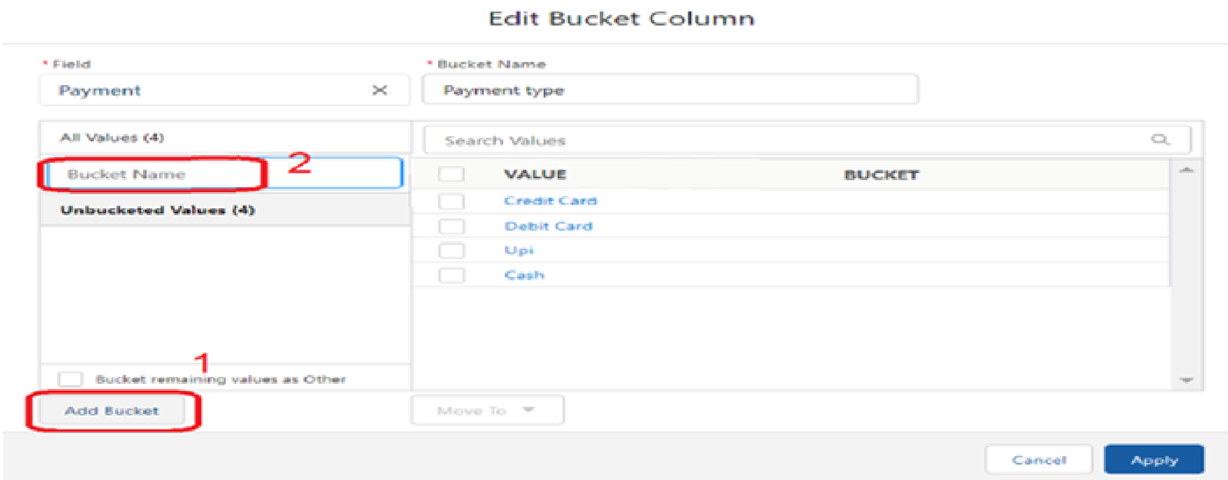
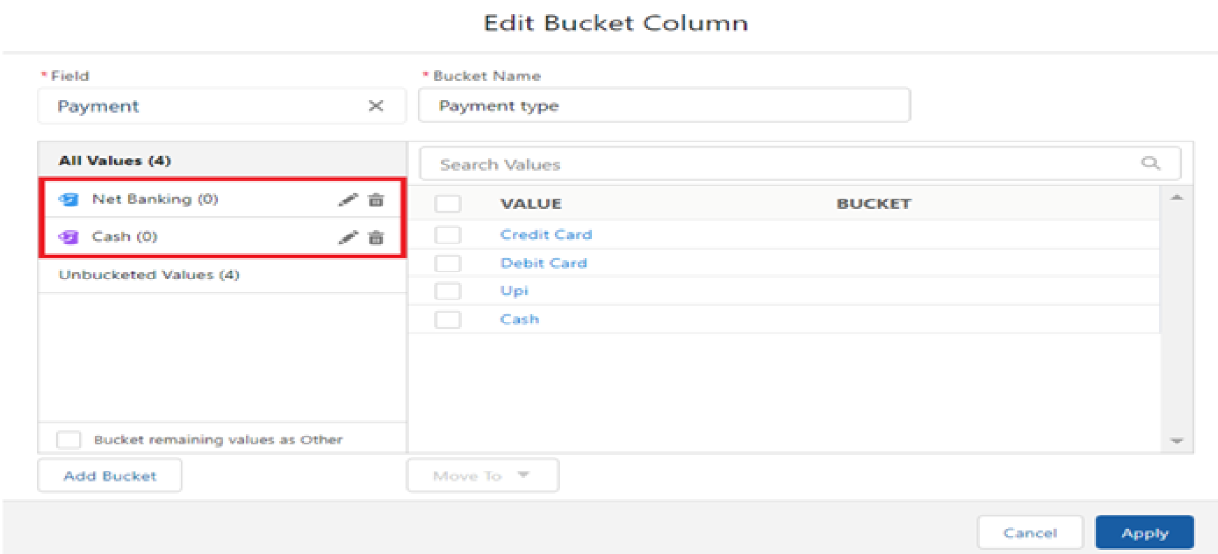
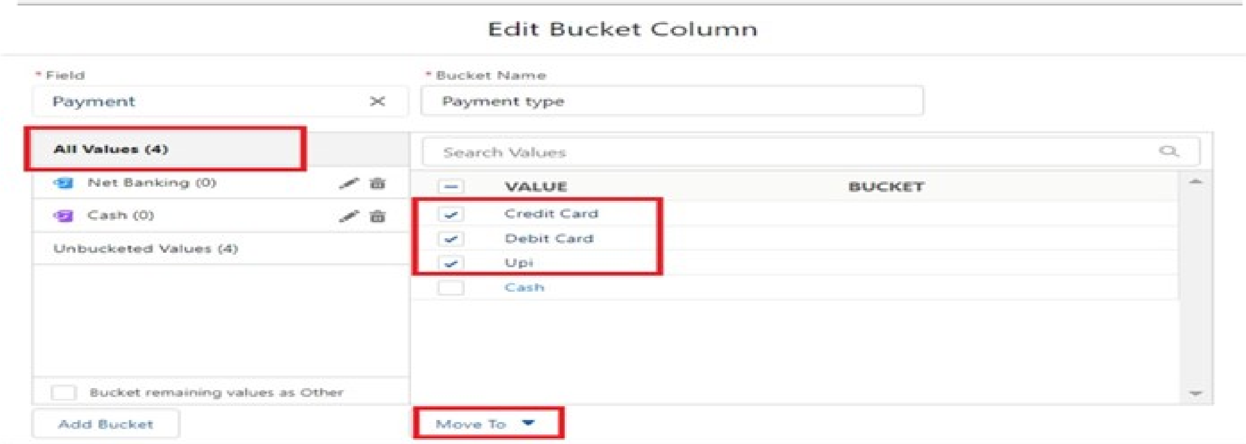
4 Chitra | Courier | Eye Liner | Debit Card
5 Swathi | Courier | Nail Polish | Upi
6 Prasad | Self Pickup | Eye Liner | Upi
7 Ajay Kumar | Courier | Lip Balm | Debit Card
8 Shankar | Self Pickup | Face Pack | Cash
9 Sandeep | Courier | Eye Liner | Upi
1
Sort Ascending
Sort Descending
Group Rows by This Field
Group Columns by This Field
Bucket This Column
2
Show Unique Count
Move Left
Move Right
Remove Column
Edit Bucket Column
* Field
Payment
* Bucket Name
Payment type
All Values (4)
Unbucketed Values (4)
Search Values
VALUE
BUCKET
Credit Card
Debit Card
Upi
Cash
Bucket remaining values as Other
Add Bucket
Move To
Cancel
Apply


Edit Bucket Column
* Field
Payment
* Bucket Name
Payment type
All Values (4)
Bucket Name
2
Unbucketed Values (4)
Search Values
VALUE
BUCKET
Credit Card
Debit Card
Upi
Cash
1
Bucket remaining values as Other
Add Bucket
Move To
Cancel
Apply


Edit Bucket Column
* Field
Payment
* Bucket Name
Payment type
All Values (4)
Net Banking (0)
Cash (0)
Unbucketed Values (4)
Search Values
VALUE
BUCKET
Credit Card
Debit Card
Upi
Cash
Bucket remaining values as Other
Add Bucket
Move To
Cancel
Apply


Edit Bucket Column
* Field
Payment
* Bucket Name
Payment type
All Values (4)
Net Banking (0)
Cash (0)
Unbucketed Values (4)
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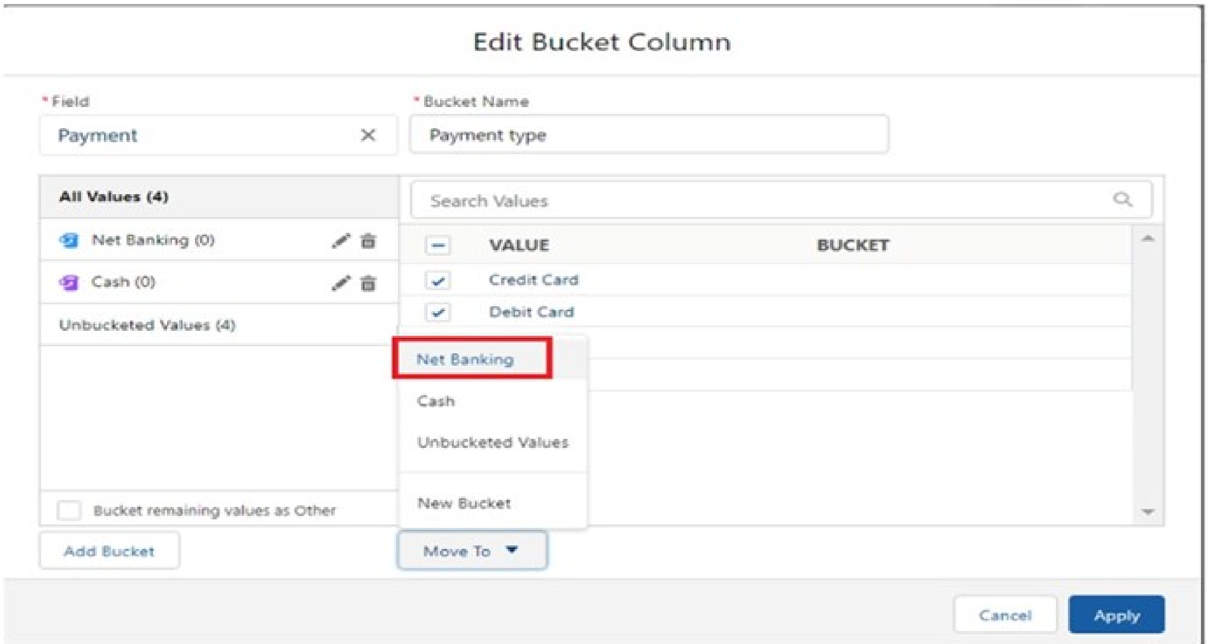
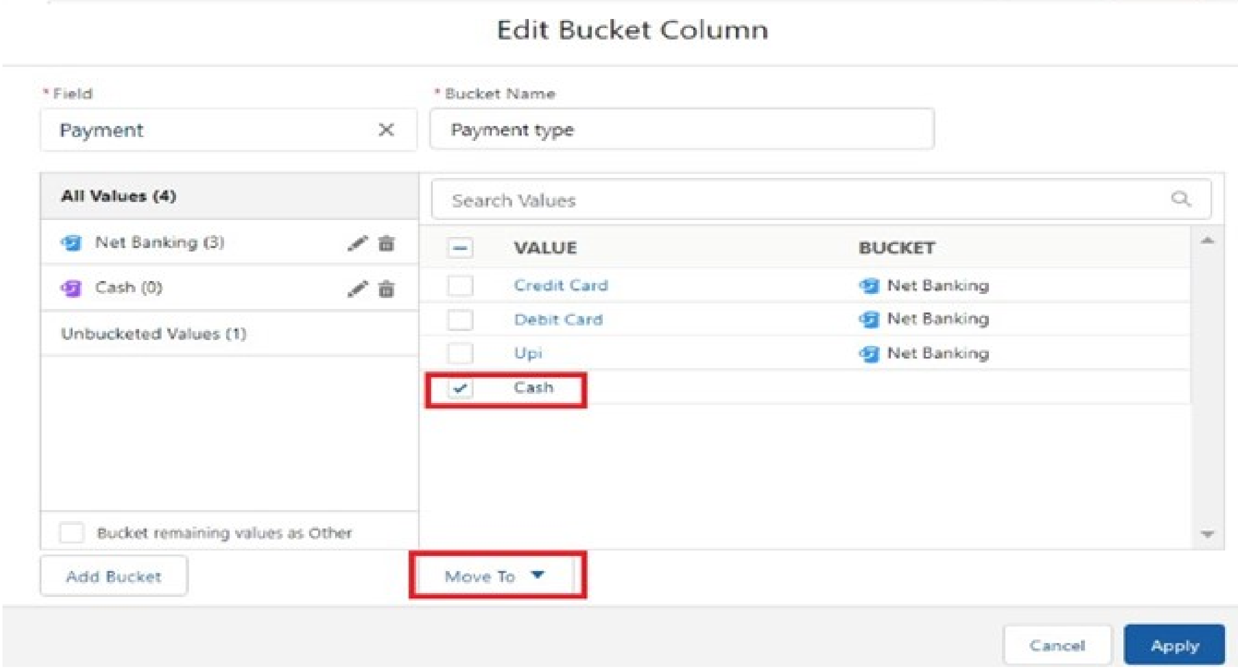
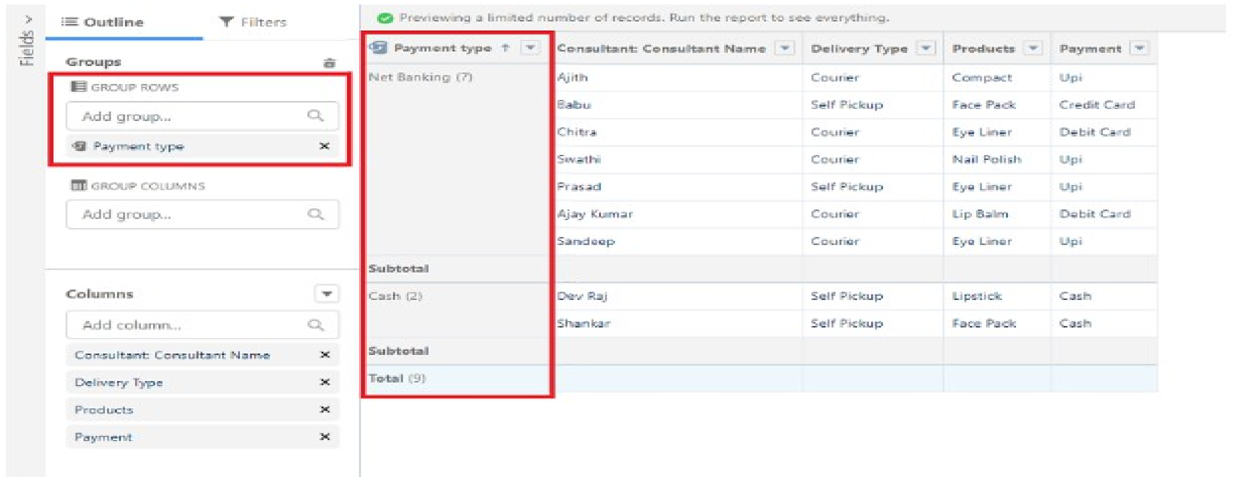




a. In Group Rows Add Payment Type Bucket Field.
b. Click refresh
c. Click Save and Run
d. Give reportname – Consultant report
e. Click Save



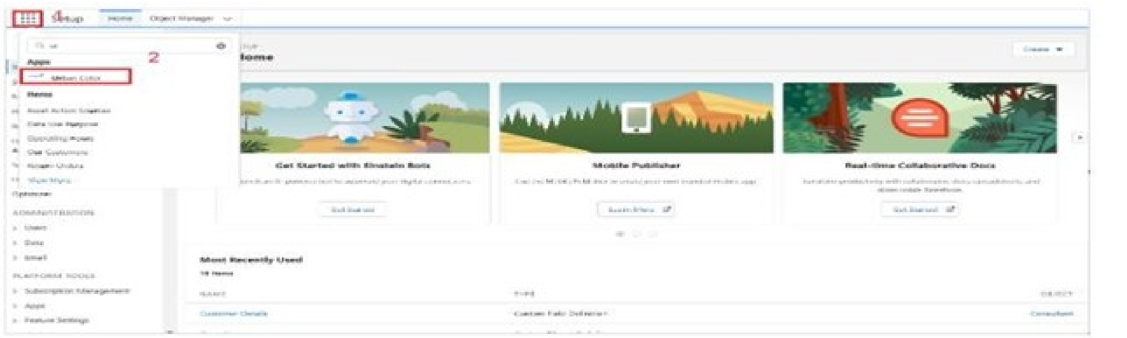
View Reports:

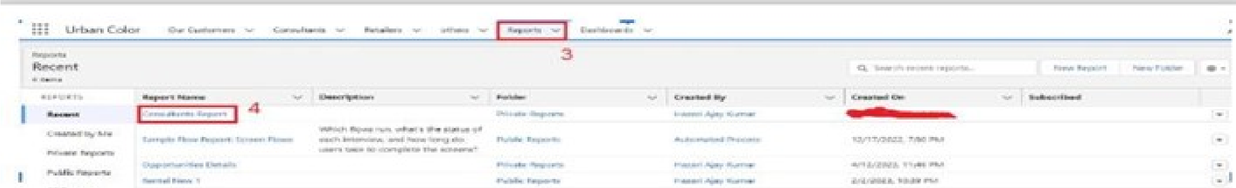
i. Click on App Launcheron the left side of the screen.

ii. Search Urban Color App & click on it.

iii. Clickon Reports Tab.

iv. Clickon Urban Color Report and see records

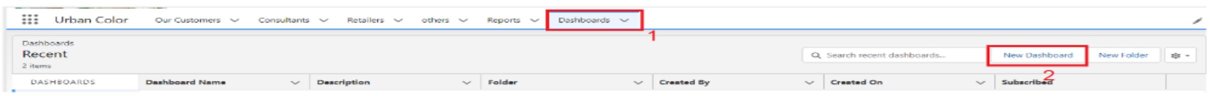


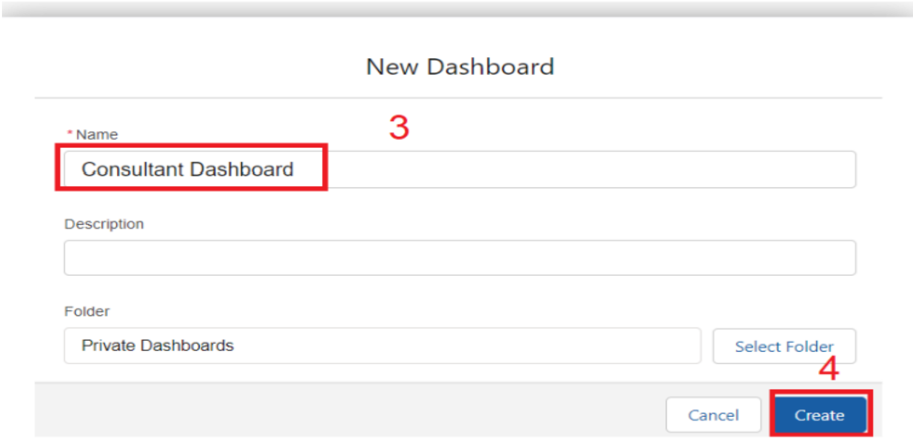


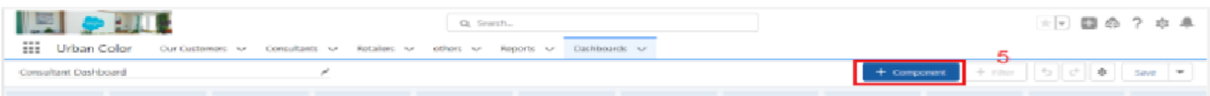
- **<u>Task 11 : Working with dashboards :</u>**

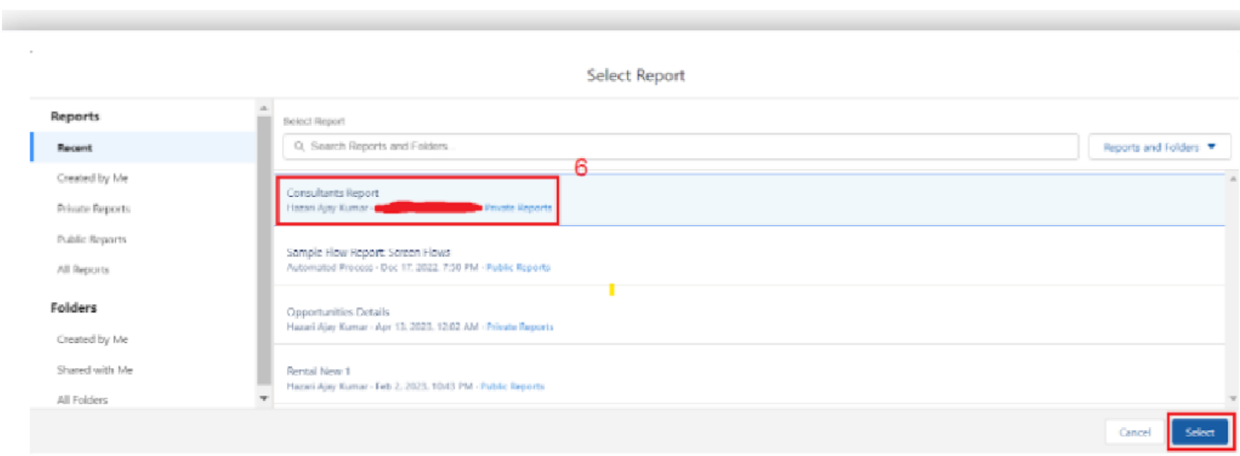
<u>Create Dashboard :</u>

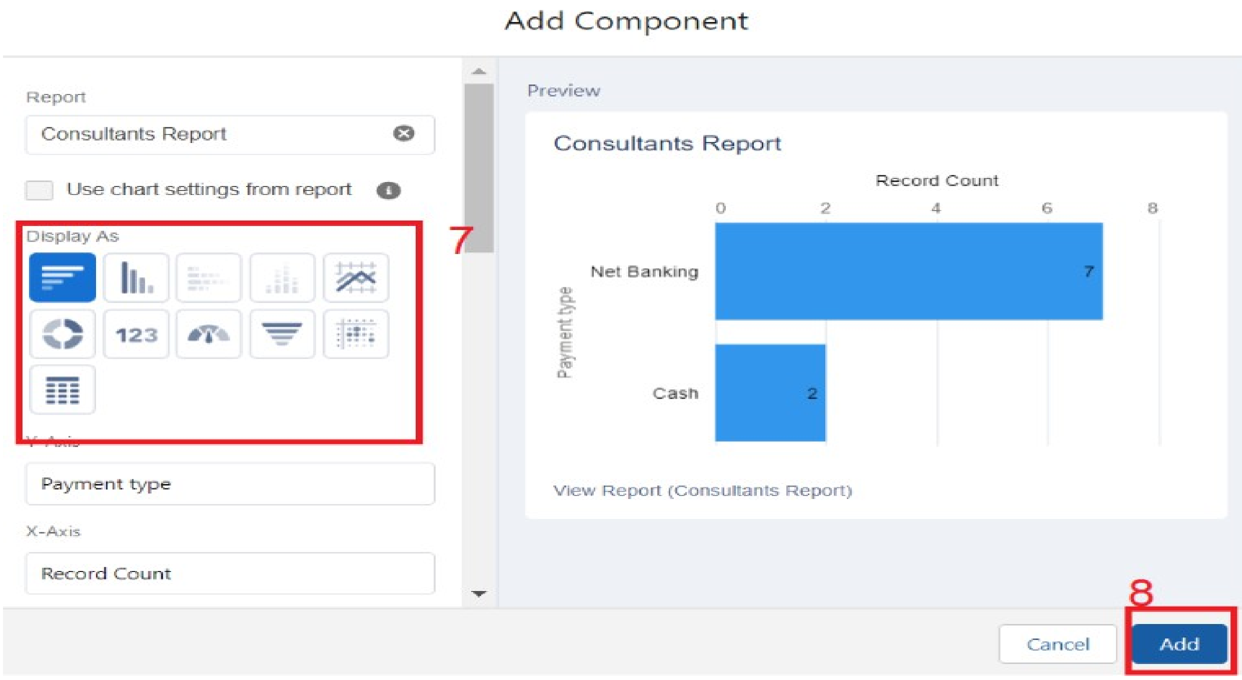
1. Click on the Dashboards tab from the Urban Color application.
2. Clickon the new dashboard.
3. Givename- Consultant Dashboard
4. Clickcreate
5. Giveyour dashboard a name and click on +component
6. Select the Consultants Reportwhich you created.
7. Forthe data visualization select any of the chart,table etc. as per your choice/requirement.
8. Clickadd.
9. Clicksave.

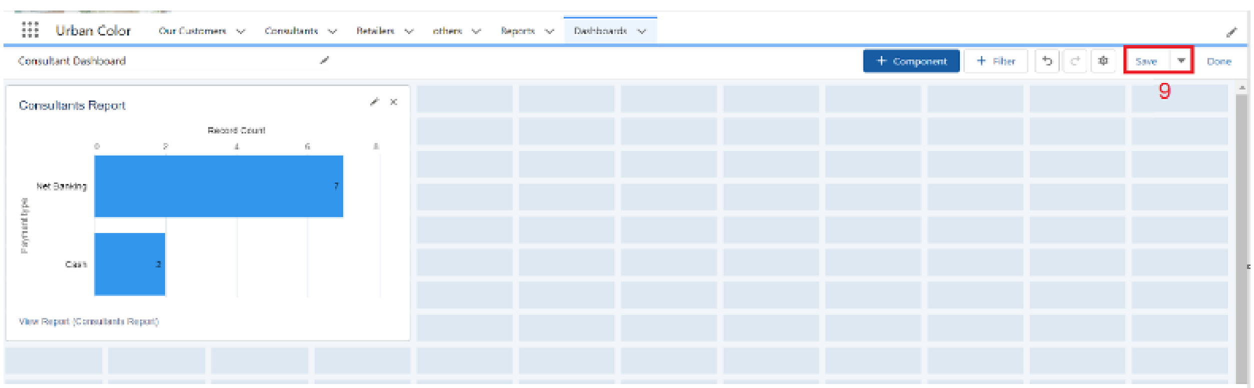

Urban Color
Our Customers
Consultants
Retailers
others
Reports
Dashboards
1
Dashboards
Recent
2 items
Search recent dashboards...
New Dashboard
New Folder
2
DASHBOARDS
Dashboard Name
Description
Folder
Created By
Created On
Subscribed


New Dashboard
3
* Name
Consultant Dashboard
Description
Folder
Private Dashboards
Select Folder
4
Cancel
Create


Search...
Urban Color
Our Customers
Consultants
Retailers
others
Reports
Dashboards
Consultant Dashboard
5
+ Component
Save

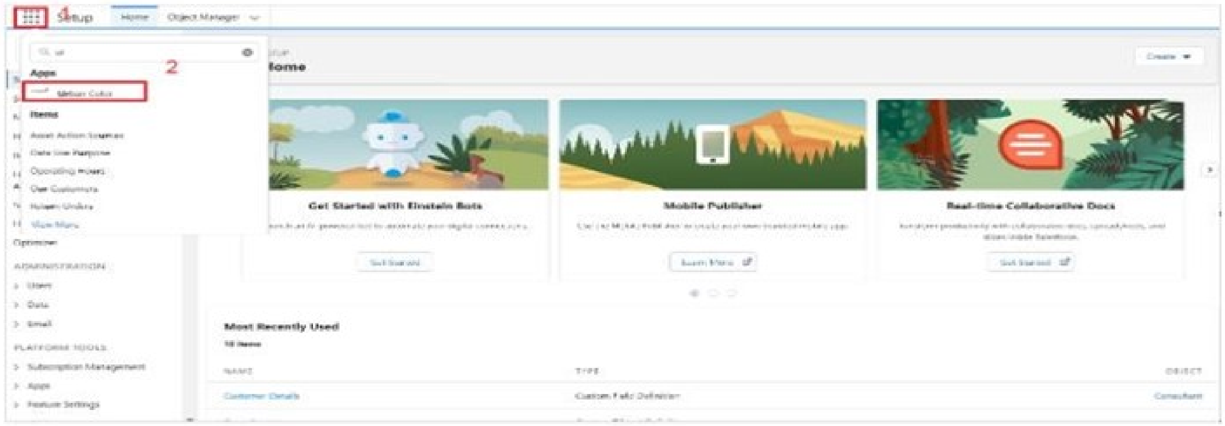

Select Report
Reports
Recent
Created by Me
Private Reports
Public Reports
All Reports
Folders
Created by Me
Shared with Me
All Folders
Select Report
Search Reports and Folders...
Reports and Folders
6
Consultants Report
Hazari Ajay Kumar · [redacted] · Private Reports
Sample Flow Report: Screen Flows
Automated Process · Dec 17, 2022, 7:50 PM · Public Reports
Opportunities Details
Hazari Ajay Kumar · Apr 13, 2023, 12:02 AM · Private Reports
Rental New 1
Hazari Ajay Kumar · Feb 2, 2025, 10:43 PM · Public Reports
Cancel
Select

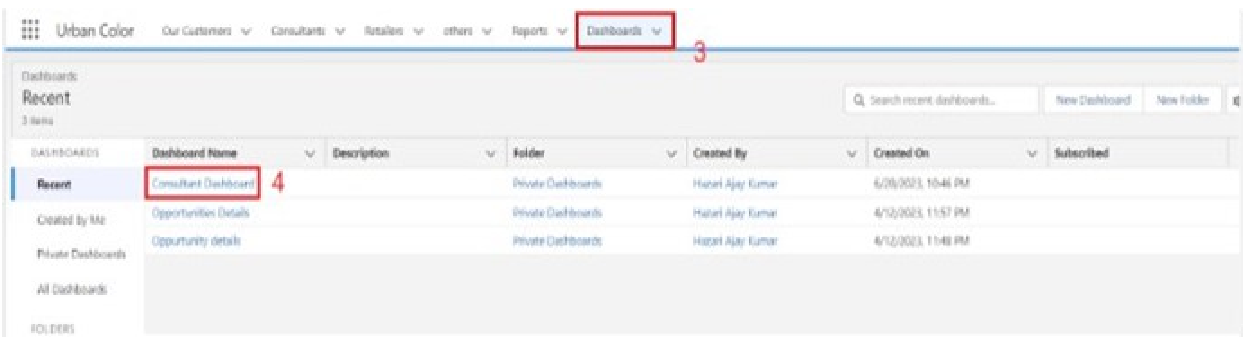




View Dashboard :

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


1
Setup
Home
Object Manager
2
Apps
Items
Create
Get Started with Einstein Bots
Mobile Publisher
Real-time Collaborative Docs
ADMINISTRATION
Users
Data
Email
PLATFORM TOOLS
Subscription Management
Apps
Feature Settings
Most Recently Used
NAME
TYPE
OBJECT
Customer Details
Consultant


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