

Cosmetics Store

Management

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:

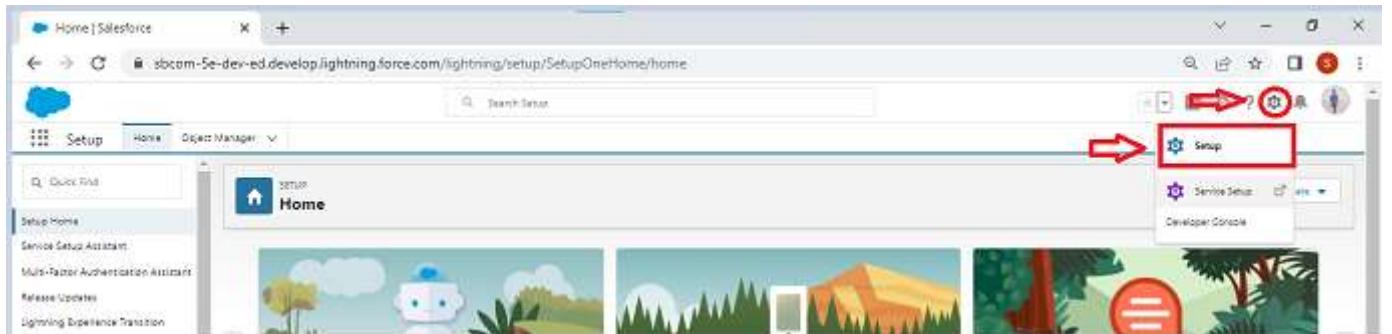
Creation of Objects for Urban Color, For this Urban Color we need to create 3 objects i.e „Our Customers,Consultants,Retailers,others.

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.



The screenshot shows the Salesforce Object Manager interface. At the top, there's a navigation bar with tabs for 'Setup', 'Home', and 'Object Manager'. The 'Object Manager' tab is highlighted with a black box and has a dropdown arrow next to it. Below the navigation bar, there's a section titled 'Object Manager' with a blue icon. It displays '51+ items, Sorted by Label'. The main area shows a table with columns: 'LABEL', 'API NAME', 'TYPE', and 'DESCRIPTION'. The first row of the table is visible.

LABEL	API NAME	TYPE	DESCRIPTION

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

For creating the another 3 objects, we need to 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
1	Customer id
2	Customer Name
3	Mobile Number
4	Email id
5	Address
6	Additional Information

Fields in Consultants objects

Fields in Consultants objects follow below data types:

S No	Field Label
1	Customer id
2	Customer Name
3	Mobile Number
4	Email id
5	Delivery Type 1)Self Pickup 2)Courier
6	Products 1)Lipstick

	2)Compact 3)EyeLiner 4)FacePack 5)Lip Balm 6)Nail Polish
7	Payment 1)Debit Card 2)Credit Card 3)UPI 4)Cash
8	Customer details
9	Address

Fields in Retailers objects

Fields in Retailers objects follow below data types:

S No	Field Label
1	Customer id
2	Customer Name
3	Mobile Number
4	Email id
5	Delivery Type 1)Self Pickup 2)Courier
6	Products 1)Lipstick 2)Compact 3)EyeLiner 4)FacePack 5)Lip Balm
	6)Nail Polish
7	Payment 1)Debit Card 2)Credit Card 3)UPI 4)Cash
8	Customer Details
	M (

Fields in Others objects

Fields in Others objects follow below data types:

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

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.

1. **Task 3: Page Layout creation :**

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

The screenshot shows the Salesforce Object Manager interface for the 'Consultant' object. The top navigation bar says 'SETUP > OBJECT MANAGER'. On the left, there's a sidebar with several options: Details, Fields & Relationships, Page Layouts (which is 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 a single item: 'Consultant Layout'. A table displays the layout details:

PAGE LAYOUT NAME	CREATED BY
Consultant Layout	Hazari Ajay Kumar, 4/1/2023, 7:25 AM

A red box highlights the 'Consultant Layout' entry in the table, and the number '2' is placed below it.

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

SETUP > OBJECT MANAGER

Consultant

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields

Buttons
Quick Actions
Mobile & Lightning Actions
Expanded Lookups
Related Lists
Report Charts

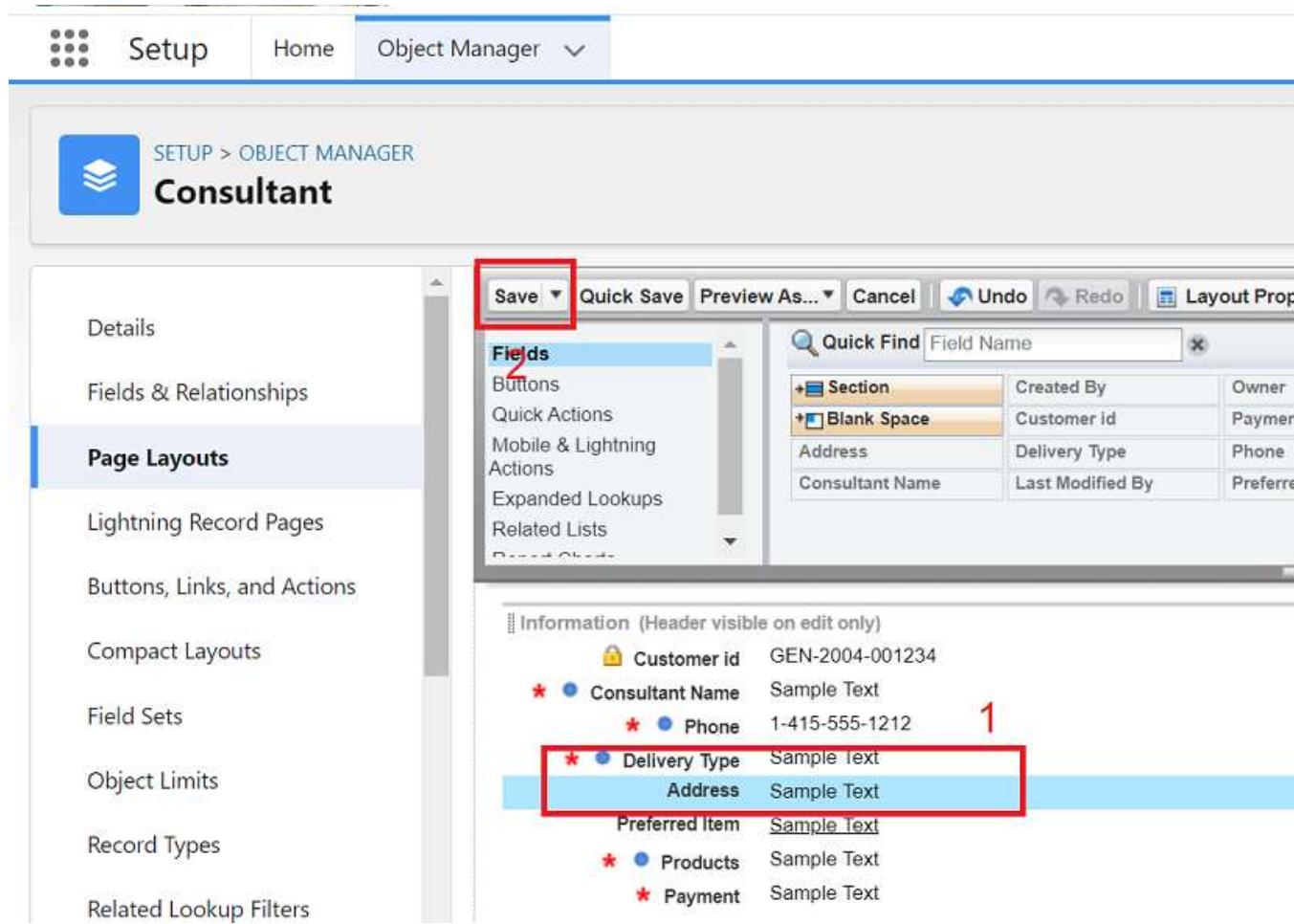
Quick Find Field Name

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

Information (Header visible on edit only)

Customer id	GEN-2004-001234
Consultant Name	Sample Text
Phone	1-415-555-1212
Preferred Item	Sample Text
Products	Sample Text
Payment	Sample Text
Delivery Type	Sample Text
Address	Sample Text

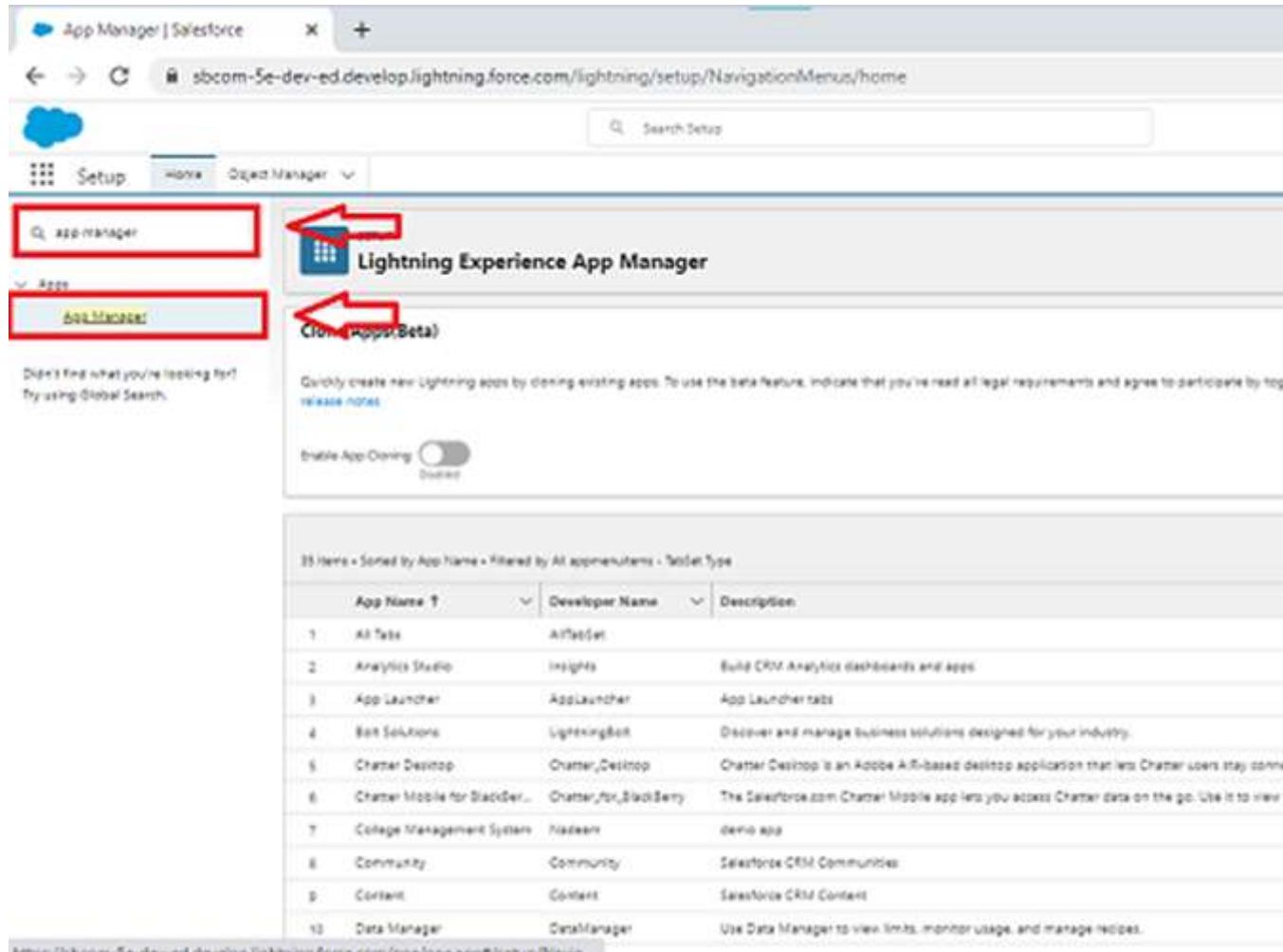
5. Click on Save



- 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.

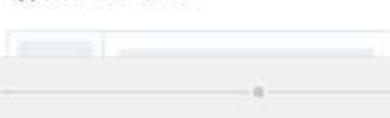


2. Fill the app name as Urban Color in app details and branding --> Next --> (App option page) keep it as default --> Next --> (Utility Items) keep it as default --> Next.

New Lightning App

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details	App Branding
* App Name <input type="text" value="Name your app..."/> * Developer Name <input type="text" value="Enter a developer name..."/> Description <input type="text" value="Enter a description..."/>	Image <input type="button" value="Upload"/> Primary Color Hex Value <input type="text" value="#007002"/> Org Theme Options <input type="checkbox"/> Use the app's image and color instead of the org's custom theme
App Launcher Preview 	

Next >

- To Add Navigation Items:

New Lightning App

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename them on mobile phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item does not support.

Available Items	Selected Items
Available Items: <input type="button" value="Create"/> <input type="button" value="Create"/> <input type="text" value="Type to filter list..."/> <ul style="list-style-type: none"> <input type="checkbox"/> Accounts <input type="checkbox"/> Activities <input type="checkbox"/> Alert Settings <input type="checkbox"/> All Sites <input type="checkbox"/> Alternative Payment Methods <input type="checkbox"/> App Launcher <input type="checkbox"/> Appointment Invitations 	Selected Items: No items selected.

Next >

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

User Profiles

Choose the user profiles that can access this app.

Available Profiles	Selected Profiles
<input type="text"/> Type to filter list...	No Profiles selected
Analytics Cloud Integration User	
Analytics Cloud Security User	
Authenticated Website	
Authenticated Website	<input checked="" type="checkbox"/>
Contract Manager	
Cross Org Data Proxy User	
Custom: Sales Profile	

- 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. At the top, there are tabs: 'Setup' (which is selected), 'Home', and 'Object Manager'. Below the tabs is a search bar containing the text 'profi'. A sidebar on the left has a 'Users' section with a 'Profiles' tab highlighted in yellow. A message in the center says 'Didn't find what you're looking for? Try using Global Search.' To the right, under the 'Profiles' heading, is a card for the 'Store Supervisor' profile. The card includes the profile name, a description ('Users with this profile have the permissions and page layouts listed below'), and several status links: 'Login IP Ranges [0]', 'Enabled Apex Class Access [703]', 'Enabled External Credential Principal Access [0]', 'Enabled Custom Object Access [0]', and 'Enabled Service [0]'. Below the card is a 'Profile Detail' section with a table:

Name	Store Supervisor
User License	Salesforce
Description	

Buttons for 'Edit' and 'Clone' are located at the top right of the profile detail section.

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. The left sidebar has a search bar with 'prof' typed in and a 'Profiles' section. A message says 'Didn't find what you're looking for? Try using Global Search.' The main area displays a list of profiles with checkboxes for selecting them.

Profile Name	Action	Value
(standard__LightningSort)		
Community (standard__Community)	<input checked="" type="checkbox"/>	<input type="radio"/>
Content (standard__Content)	<input checked="" type="checkbox"/>	<input type="radio"/>
Data Manager (standard__DataManager)	<input checked="" type="checkbox"/>	<input type="radio"/>
Digital Experiences (standard__SalesforceCMS)	<input checked="" type="checkbox"/>	<input type="radio"/>
Lightning Usage App (standard__LightningInstrumentation)	<input checked="" type="checkbox"/>	<input type="radio"/>
LWC LEARNINGS (LWC__LEARNINGS)	<input type="checkbox"/>	<input type="radio"/>
Marketing (standard__Marketing)	<input checked="" type="checkbox"/>	<input type="radio"/>
Queue Management (standard__QueueManagement)	<input checked="" type="checkbox"/>	<input type="radio"/>
Rental Management (Rental_Management)	<input type="checkbox"/>	<input type="radio"/>

Below the list is a 'Service Provider Access' section with a 'Tab Settings' sub-section. It includes a checkbox for 'Overwrite users' personal tab customizations'.

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

 SETUP

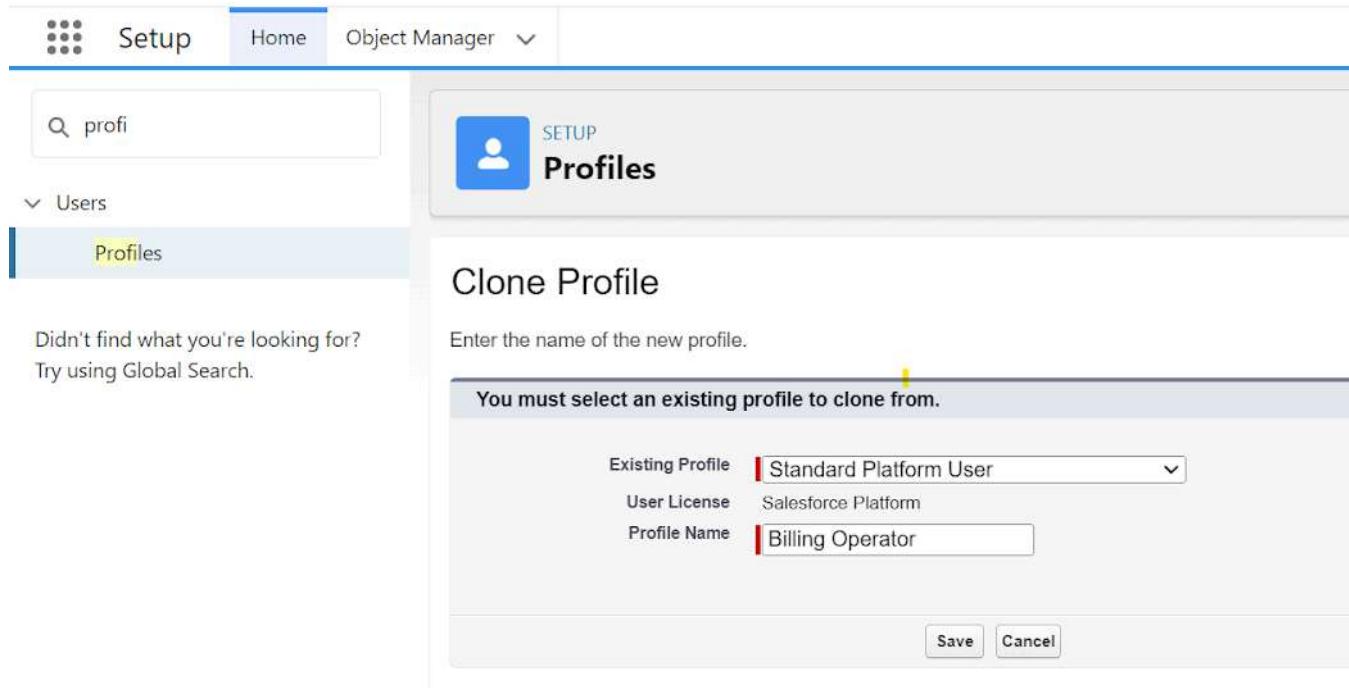
Profiles

Allow OAuth for employees [i](#)

Password Policies

User passwords expire in	90 days ▼
Enforce password history	3 passwords remembered ▼
Minimum password length	8
Password complexity requirement	Must include alpha and numeric characters
Password question requirement	Cannot contain password ▼
Maximum invalid login attempts	10
Lockout effective period	15 minutes ▼
Obscure secret answer for password resets	<input type="checkbox"/>
Require a minimum 1 day password lifetime	<input type="checkbox"/>
Don't immediately expire links in forgot password emails	<input type="checkbox"/> i

[Save](#) [Save & New](#) [Cancel](#)



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.

1. Click on the Gear Icon

2. Click "Setup"

3. In the Quick Find box, enter "Roles"

4. Click "Roles"

5. Click on "Set Up Roles"

6. Click "Expand All"

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

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

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

10. Click on Save .



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



SETUP

Roles

Role Edit

New Role

Role Edit

Label

Store Head

Role Name

Store_Head

This role reports to

thesmartbridge.com

Role Name as displayed on
reports

Save

Similarly create One Roles under Store Head as Billing Operator.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar on the left contains the text 'roles'. The main content area has a sidebar with sections like 'Users' (selected), 'Roles' (selected), 'Feature Settings', 'Sales' (with 'Contact Roles on Contracts' and 'Contact Roles on Opportunities'), 'Service' (with 'Case Teams' (selected), 'Case Team Roles', and 'Contact Roles on Cases'), and ' Didn't find what you're looking for? Try using Global Search.'

Role Edit
New Role

Role Edit

Label	Billing Operator
Role Name	Billing_Operator
This role reports to	Store Head
Role Name as displayed on reports	

Buttons: Save, Save & New, Cancel

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.

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

User Edit

General Information

Save Save & New Cancel

First Name	Amar	Role	Store H
Last Name	k	User License	Salesfo
Alias	ak	Profile	Store S
Email	mailid@gmail.com	Active	<input checked="" type="checkbox"/>
Username	amar2133@salesforce.co	Marketing User	<input type="checkbox"/>
Nickname	User167161323313747430	Offline User	<input type="checkbox"/>
Title	Store Supervisor	Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
		Site.com Publisher User	<input type="checkbox"/>
		WDC User	<input type="checkbox"/>
		Data.com User Type	--None--

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar at the top left contains the text 'use'. The left sidebar has a tree view with the following nodes:

- Users (selected)
- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users (selected)
- Feature Settings
- Data.com
- Prospector Users
- Process Automation
- Dashed And Failed Flow

The main content area is titled 'SETUP' and 'Users'. It contains the following sections:

- Single Sign On Information**: Federation ID input field.
- Locale Settings**: Time Zone dropdown set to '(GMT-07:00) Pacific Daylight Time (America/Los Angeles)', Locale dropdown set to 'English (United States)', and Language dropdown set to 'English'.
- Approver Settings**: Delegated Approver and Manager lookup fields, and a dropdown for 'Receive Approval Request Emails' set to 'Only if I am an approver'. There is also a checkbox for 'Generate new password and notify user immediately'.

At the bottom right are 'Save', 'Save & New', and 'Cancel' buttons.

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.

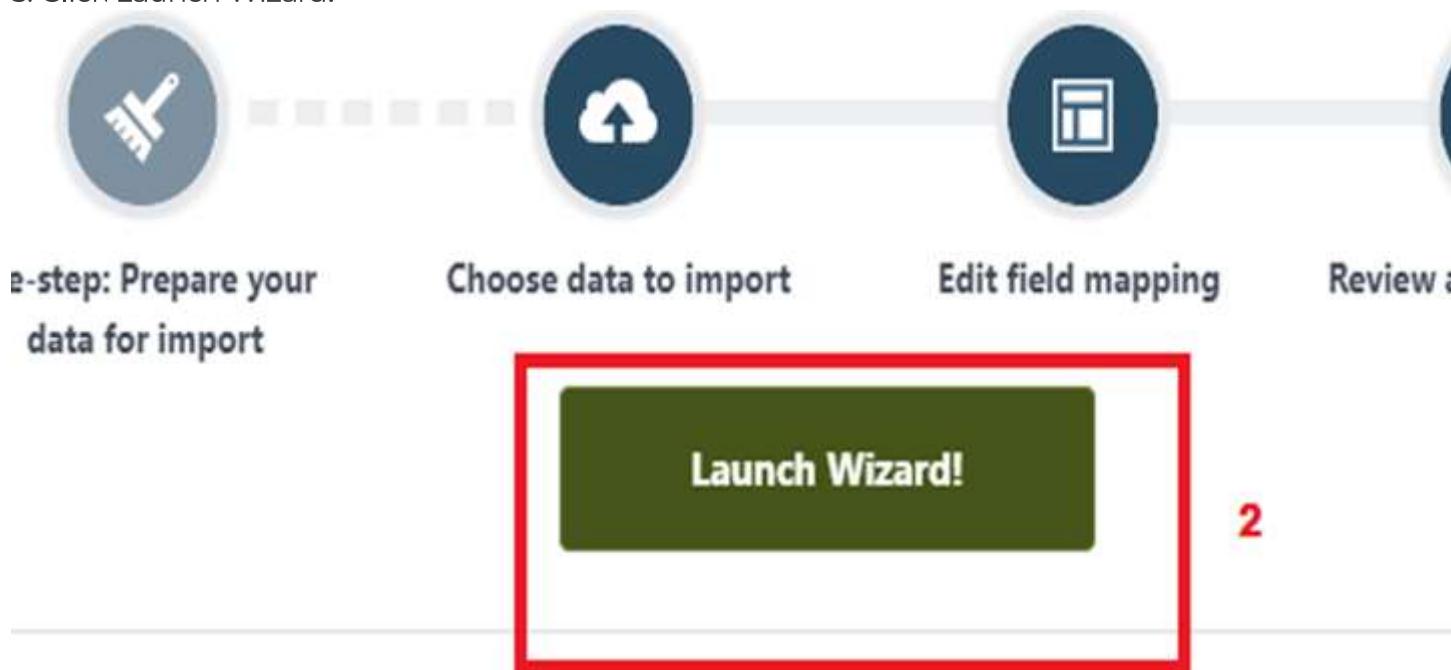
► Task 9: Importing Data :

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.

The screenshot shows the Salesforce Setup interface. At the top, there are tabs: 'Setup' (selected), 'Home', and 'Object Manager'. Below the tabs, a blue button labeled 'Let's do this' has a callout pointing to the 'Choose data' section. The 'Choose data' section contains a list of objects: 'Drivers', 'Fees', 'others' (with a red '3' indicating pending actions), 'Consultants' (which is highlighted with a red box and has a red '3' next to it), 'Our Customers', and 'Properties'. To the right of the list is a button labeled 'Edit mapping'. The background shows a blurred view of the 'Import your Data into Salesforce' page.

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 4

Update existing records

Add new and update existing records

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

Choose data

Edit mapping

What kind of data are you importing?

Standard objects Custom objects

Attendees >

Buyers >

Customers >

Departments

What do you want to do?

Add new records

Match by:
--None--

Which User field in your file designates record owners?
--None--

Trigger workflow rules and processes?
 Trigger workflow rules and processes for new and updated records

Where is your data located?

Drag CSV

CSV

5

7. Since the field names in the CSV file (CSV Header) are the same as the field names in your object (Mapped Salesforce Object), the fields are automatically mapped. Click Next.

The screenshot shows the 'Edit Field Mapping' interface in Salesforce. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. Below it is a progress bar with 'Almost done' at the end. The main title is 'Edit Field Mapping: Consultants'. A note below says, '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.' The table below lists field mappings:

Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	Consultant Name	Consultant Name	Dev Raj	Ajith	Babu
Change	Mobile Number	Mobile Number	984638732	784653673	9028
Change	Delivery Type	Delivery Type	Self Pickup	Courier	Self
Change	Address	Address		Hyderabad	
Change	Products	Products	Lipstick	Compact	Face
Change	Payment	Payment	Cash	UPI	Cred
Change	Email	Email		ajith@gmail.com	Babu

8. The next screen gives you a summary of your data import. Click 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
View Request	View Result	7512w00000Xqrar	6/19/2023, 11:05 PM	6/19/2023, 11:05 PM	103	52	0	0

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.

1

Setup Home Object Manager

2

Urban Color

ETUP

Home

Get Started with Einstein Bots

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

Get Started

Mobile Publisher

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

Learn More

Optimizer

ADMINISTRATION

Users

Data

Email

PLATFORM TOOLS

Subscription Management

Apps

Feature Settings

Most Recently Used

10 items

NAME	TYPE
Customer Details	Custom Field Definition

Customer Details

Custom Field Definition

This screenshot shows the Salesforce Setup Home page. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A sidebar on the left contains a search bar with the text 'Urban Color' highlighted by a red box. The sidebar also lists various setup categories like 'Optimizer', 'ADMINISTRATION', and 'PLATFORM TOOLS', each with expandable sections. Below the sidebar, a main content area features two cards: 'Get Started with Einstein Bots' (with a small robot icon) and 'Mobile Publisher' (with a smartphone icon). A 'Most Recently Used' section shows a table with one item: 'Customer Details' under 'Custom Field Definition'. A red number '2' is overlaid on the sidebar search bar.

REPORT ▾ New Consultants Report **Consultants**

Fields > **Outline** **Filters**

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.

	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**

Fields > **Outline** **Filters**

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.

	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

1 Sort Ascending
2 Sort Descending
3 Group Rows by This Field
4 Group Columns by This Field
5 Bucket This Column
6 Show Unique Count
7 Move Left
8 Move Right
9 Remove Column

Edit Bucket Column

* Field * Bucket Name

Payment	X	Payment type
---------	---	--------------

All Values (4)

Search Values		
	VALUE	BUCKET
<input type="checkbox"/>	Credit Card	
<input type="checkbox"/>	Debit Card	
<input type="checkbox"/>	Upi	
<input type="checkbox"/>	Cash	

Unbucketed Values (4)

Bucket remaining values as Other

Add Bucket Move To ▾

Cancel Apply

Edit Bucket Column

*Field *Bucket Name

Payment	X	Payment type
---------	---	--------------

All Values (4)

Bucket Name	2
-------------	---

Unbucketed Values (4)

<input type="checkbox"/> Bucket remaining values as Other	1
---	---

Add Bucket

Move To ▾

Search Values

VALUE	BUCKET
<input type="checkbox"/> Credit Card	
<input type="checkbox"/> Debit Card	
<input type="checkbox"/> Upi	
<input type="checkbox"/> Cash	

Cancel Apply

Edit Bucket Column

* Field

Payment

* Bucket Name

Payment type

All Values (4)

 Net Banking (0)



 Cash (0)



Unbucketed Values (4)

Bucket remaining values as Other

Search Values



VALUE

BUCKET



Credit Card



Debit Card



Upi



Cash

Add Bucket

Move To ▾

Edit Bucket Column

* Field	* Bucket Name
Payment	X Payment type
All Values (4)	
Net Banking (0)	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Cash (0)	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Unbucketed Values (4)	
<input type="checkbox"/> Bucket remaining values as Other	
Add Bucket	<input type="button" value="Move To ▾"/>

SEARCH

VALUE	BUCKET
<input checked="" type="checkbox"/> Credit Card	
<input checked="" type="checkbox"/> Debit Card	
<input checked="" type="checkbox"/> Upi	
<input type="checkbox"/> Cash	

Edit Bucket Column

* Field

Payment

* Bucket Name

Payment type

All Values (4)

 Net Banking (3)



 Cash (0)



Unbucketed Values (1)

Bucket remaining values as Other

Add Bucket

Search Values

VALUE

Credit Card

BUCKET

 Net Bar

Debit Card

 Net Bar

Upi

Cash

 Net Bar

Move To ▾

Edit Bucket Column

* Field * Bucket Name

Payment	X	Payment type
---------	---	--------------

All Values (4)

SEARCH VALUES	VALUE	BUCKET
Net Banking (3)	<input checked="" type="checkbox"/>	
Cash (1)	<input checked="" type="checkbox"/>	
Unbucketed Values (0)		

Bucket remaining values as Other

Add Bucket Move To ▾

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

Fields > **Outline** Filters

Groups

GROUP ROWS

Add group...

Columns

Add column...

Consultant: Consultant Name X

Delivery Type X

Products X

Payment X

Payment type X

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**

Fields > **Outline**  Filters

Groups 

GROUP ROWS  Add group... 

Payment type 

GROUP COLUMNS  Add group... 

Columns 

Add column... 

Consultant: Consultant Name 

Delivery Type 

Products 

Payment 

Payment type ↑ ↴  Previewing a limited number of records. Run the report to see everything.

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

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.

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.

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

