

URBAN COLOR MANAGEMENT SYSTEM

Empowering Colorful Cities

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Abstract

Urban Color Management System is a specialized Customer Relationship Management (CRM) application designed to manage and coordinate color schemes within urban environments. With the growing emphasis on aesthetic appeal in city planning, managing the diversity of colors across various urban structures—such as buildings, public spaces, and street furniture—has become a complex task. This system provides a comprehensive solution for city planners, architects, and urban developers to maintain and update color schemes effectively.

The system offers features like color palette management, project tracking, and stakeholder communication, all within an intuitive interface. By integrating with existing urban planning tools, the Urban Color Management System enhances collaboration between different teams and ensures consistent color application across projects.

Key benefits include improved efficiency in project management, better communication among stakeholders, and the ability to maintain a cohesive visual identity across urban spaces. This system aims to contribute to the creation of visually appealing cities that reflect a harmonious blend of tradition and modernity.

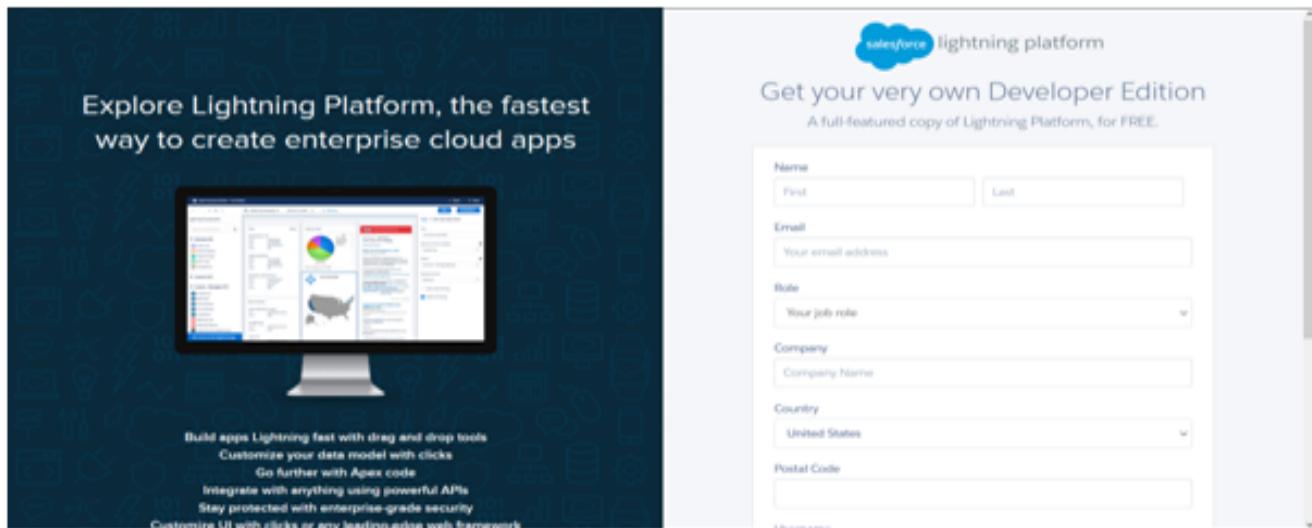
INDEX PAGE

TOPICS	PAGES
1.Creation salesforce org	01-02
2.Object	03-08
3.Feilds And RelationalShip	09-11
4.Page Layouts	12-13
5.The Lightning App	14-16
6.Profile	17-20
7.Setup Roles	21-22
8.Users	23-25
9.User Adaption	26-29
10.Import Data	30-33
11.What Are Reports ?	34-41
12.Dashboards	42-45

1. Creating a Developer Account in Salesforce

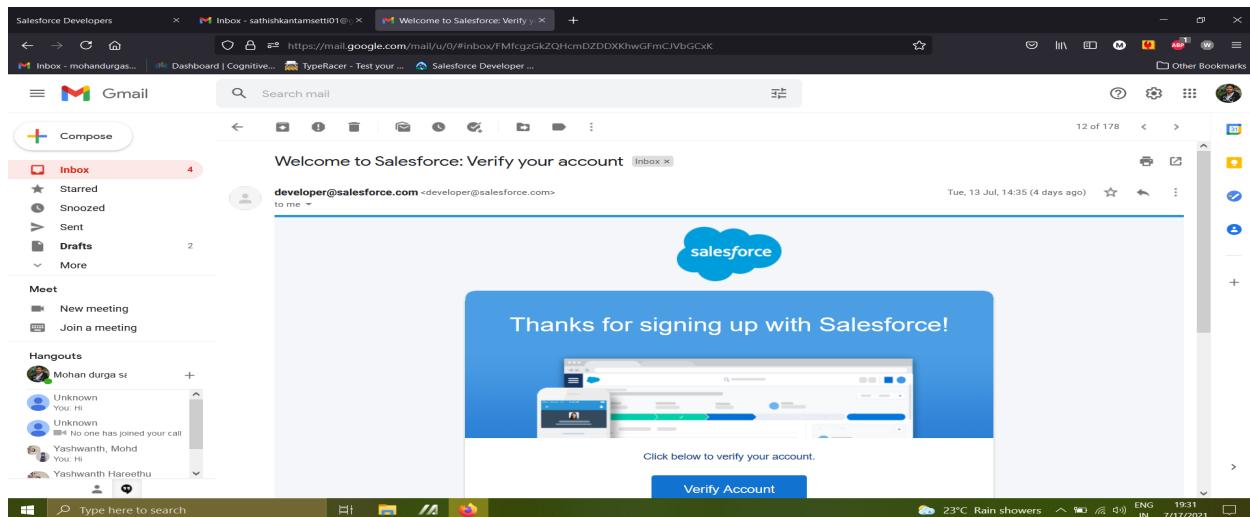
Step 1: Sign Up for a Developer Org

1. Go to developers.salesforce.com/signup.
2. Click on "Sign Up."
3. Fill out the Sign-Up Form with the following details:
 - First Name & Last Name
 - Email
 - Role: Developer
 - Company: [Your College Name]
 - Country: India
 - Postal Code: [Your Pin Code]
 - Username: Create a username using a combination of your name and company.
This does not need to be a valid email; you can format it as
username@organization.com.
4. Click on "Sign Up" after filling in all the details.



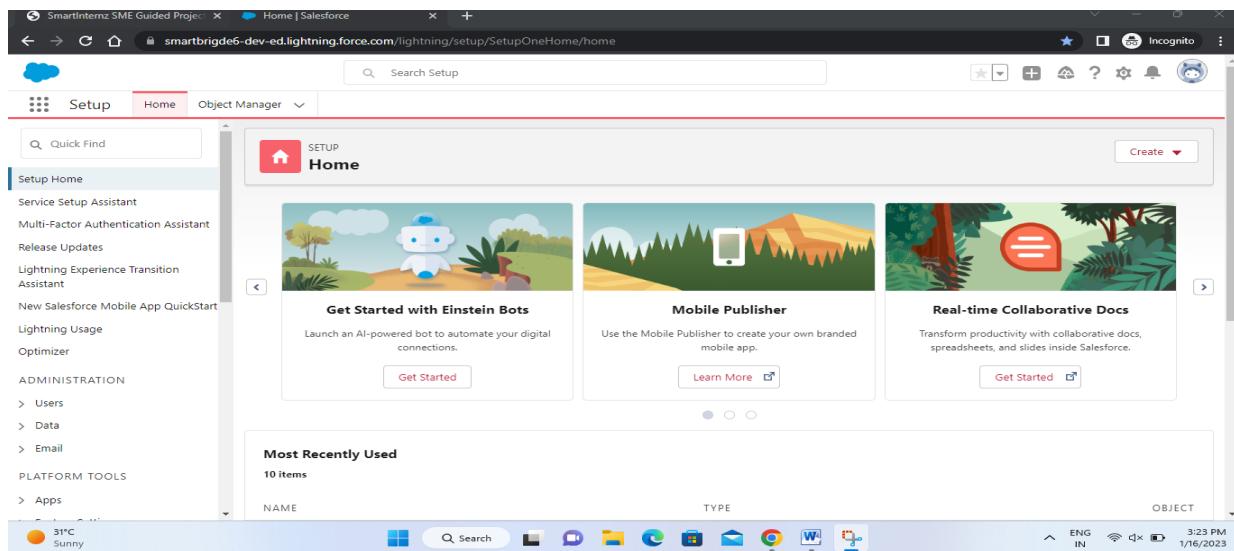
Step 2: Account Activation

1. Go to your email inbox that you used for signing up.
2. Find the verification email from Salesforce and click on the "Verify Account" link to activate your account.
 - Note: The email might take 5-10 minutes to arrive.



Step 3: Login to Your Salesforce Account

1. Go to login.salesforce.com.
2. Enter your username and password created during the sign-up process.
3. Login to access your Salesforce Developer account.
 - You will see the home page after logging in.



2.Salesforce Objects

Salesforce objects are database tables that allow you to store data specific to an organization. Objects in Salesforce are of two types:

1. **Standard Objects:** These are the pre-built objects provided by Salesforce, such as Users, Contracts, Reports, Dashboards, and more. Standard objects form the foundation of Salesforce's data structure and cover common business scenarios.
2. **Custom Objects:** These are user-defined objects created to store data that is unique to your organization's needs. In the context of the Urban Color Management System, examples of custom objects include **Our Customers, Consultants, Retailers, and Others.**

2.1.Creating Objects for Urban Color Management

In the Urban Color Management System, we need to create three custom objects: **Our Customers, Consultants, Retailers, and Others.** The following steps will guide you through the process of creating these objects in Salesforce.

Step 1: Access Setup

1. Click on the gear icon in the upper-right corner of Salesforce.
2. Select "Setup" from the dropdown menu.

Step 2: Open Object Manager

1. Click on the "Object Manager" tab located next to the Home tab.

Step 3: Create a Custom Object

1. On the **Object Manager** page, look to the right side of the screen.
2. Click on the "Create" dropdown and select **Custom Object**.

Step 4: Create "Our Customer" Object

1. On the **Custom Object Definition** page, enter the following details:
 - **Label:** Our Customer
 - **Plural Label:** Our Customers

- **Record Name:** Our Customer
- 2. **Check the following boxes:**
 - **Allow Reports**
 - **Allow Search**
- 3. **Click "Save"** to create the object.

Step 5: Create a Custom Tab for "Our Customer"

1. **Click the "Home" tab** and enter "Tabs" in the Quick Find search bar.
2. **Select "Tabs"** from the search results.
3. Under **Custom Object Tabs**, click **New**.
4. For **Object**, select **Our Customer**.
5. For **Tab Style**, select any icon that represents your object.
6. Leave all other settings as defaults and click **Next**.
7. **Click "Next"** again, then **Save**.

2.2.Creating the Consultants Object

The following steps will guide you through the process of creating the **Consultants** object in Salesforce.

Step 1: Access Setup

1. **Click on the gear icon** in the upper-right corner of Salesforce.
2. **Select "Setup"** from the dropdown menu.

Step 2: Open Object Manager

1. **Click on the "Object Manager" tab** located next to the Home tab.

Step 3: Create a Custom Object

1. On the **Object Manager** page, look to the right side of the screen.
2. **Click on the "Create" dropdown** and select **Custom Object**.

Step 4: Create "Consultants" Object

1. On the **Custom Object Definition** page, enter the following details:
 - **Label:** Consultant
 - **Plural Label:** Consultants
 - **Record Name:** Consultant
2. **Check the following boxes:**
 - **Allow Reports**
 - **Allow Search**
3. **Click "Save"** to create the object.

Step 5: Create a Custom Tab for "Consultants"

1. **Click the "Home" tab** and enter "Tabs" in the Quick Find search bar.
2. **Select "Tabs"** from the search results.
3. Under **Custom Object Tabs**, click **New**.
4. For **Object**, select **Consultants**.
5. For **Tab Style**, select any icon that represents your object.
6. Leave all other settings as defaults and click **Next**.
7. **Click "Next"** again, then **Save**.

2.3.Creating the Retailers Object

The following steps will guide you through the process of creating the **Retailers** object in Salesforce.

Step 1: Access Setup

1. Click on the gear icon in the upper-right corner of Salesforce.
2. Select "Setup" from the dropdown menu.

Step 2: Open Object Manager

1. Click on the "Object Manager" tab located next to the Home tab.

Step 3: Create a Custom Object

1. On the **Object Manager** page, look to the right side of the screen.
2. Click on the "Create" dropdown and select **Custom Object**.

Step 4: Create "Retailers" Object

1. On the **Custom Object Definition** page, enter the following details:
 - **Label:** Retailer
 - **Plural Label:** Retailers
 - **Record Name:** Retailer
2. Check the following boxes:
 - **Allow Reports**
 - **Allow Search**
3. Click "Save" to create the object.

Step 5: Create a Custom Tab for "Retailers"

1. Click the "Home" tab and enter "Tabs" in the Quick Find search bar.
2. Select "Tabs" from the search results.
3. Under **Custom Object Tabs**, click **New**.
4. For **Object**, select **Retailers**.
5. For **Tab Style**, select any icon that represents your object.

6. Leave all other settings as defaults and click **Next**.
7. Click "Next" again, then **Save**.

2.4.Creating the Others Object

The following steps will guide you through the process of creating the **Others** object in Salesforce.

Step 1: Access Setup

1. Click on the gear icon in the upper-right corner of Salesforce.
2. Select "Setup" from the dropdown menu.

Step 2: Open Object Manager

1. Click on the "Object Manager" tab located next to the Home tab.

Step 3: Create a Custom Object

1. On the **Object Manager** page, look to the right side of the screen.
2. Click on the "Create" dropdown and select **Custom Object**.

Step 4: Create "Others" Object

1. On the **Custom Object Definition** page, enter the following details:
 - **Label:** Other
 - **Plural Label:** Others
 - **Record Name:** Other
2. Check the following boxes:
 - **Allow Reports**
 - **Allow Search**
3. Click "Save" to create the object.

Step 5: Create a Custom Tab for "Others"

1. Click the "Home" tab and enter "Tabs" in the Quick Find search bar.
2. Select "Tabs" from the search results.

3. Under **Custom Object Tabs**, click **New**.
4. For **Object**, select **Others**.
5. For **Tab Style**, select any icon that represents your object.
6. Leave all other settings as defaults and click **Next**.
7. **Click "Next"** again, then **Save**.

3. Fields and Relationships

In Salesforce, an object relationship is a two-way association between two objects, allowing users to connect and interact with related data across different objects. This relationship is established by creating custom relationship fields on an object. These relationship fields enable users to view records and seamlessly access related information, providing a comprehensive view of data across the Salesforce environment.

By using relationships, Salesforce ensures that all related data is interconnected, making it easier for users to navigate between related records, improving data consistency, and enhancing the overall user experience.

3.1.Fields in the "Our Customers" Object

The following fields are defined in the "Our Customers" object, each with a specific data type:

S No	Field Label	Data Type
1	Customer id	Auto Number
2	Customer Name	Text
3	Mobile Number	Phone
4	Email id	Email
5	Address	Text Area
6	Additional Information	Text Area

3.2.Fields in Consultants objects

The following fields are defined in the "Consultants" object, each with a specific data type:

S No	Field Label	Data Type
1	Customer id	Auto Number
2	Customer Name	Text
3	Mobile Number	Phone
4	Email id	Email
5	Delivery Type 1)Self Pickup 2)Courier	Picklist
6	Products 1)Lipstick	
	2)Compact 3)EyeLiner 4)FacePack 5)Lip Balm 6)Nail Polish	Multi-Picklist
7	Payment 1)Debit Card 2)Credit Card 3)UPI 4)Cash	Picklist
8	Customer details	Lookup(Our Customers Object)
9	Address	Text Long

3.3.Fields in Retailers objects

The following fields are defined in the "Retailers" object, each with a specific data type:

S No	Field Label	Data Type
1	Customer id	Auto Number
2	Customer Name	Text
3	Mobile Number	Phone
4	Email id	Email
5	Delivery Type 1)Self Pickup 2)Courier	Picklist
6	Products 1)Lipstick 2)Compact 3)EyeLiner 4)FacePack 5)Lip Balm	Multi-Picklist
	6)Nail Polish	
7	Payment 1)Debit Card 2)Credit Card 3)UPI 4)Cash	Picklist
8	Customer Details	Master-Detail Relationship (Our Customers Object)

3.4.Fields in Others objects

The following fields are defined in the "Others" object, each with a specific data type:

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

4. Page Layouts

In Salesforce, page layouts define the organization and arrangement of fields, buttons, related lists, and other components on an object's detail and edit pages. They allow you to control the user interface and tailor it to meet the specific needs of your organization.

Page Layout Creation

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

The screenshot shows the Salesforce Object Manager interface for the 'Consultant' object. The left sidebar has a 'Page Layouts' item highlighted with a red box and the number '1'. The main content area displays a table titled 'Page Layouts' with one item: 'Consultant Layout'. The table has columns for 'PAGE LAYOUT NAME', 'CREATED BY', and 'MODIFIED BY'. The 'Consultant Layout' row is highlighted with a red box and the number '2'. The URL at the bottom of the page is 'thesmarbridgecom2-dev-ed.develop.lightning.force.com/lightning...view'.

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

4. Click and drag the **Delivery Type** and **Address** fields below the **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

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

Information (Header visible on edit only)

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

5. Click on Save.

Setup Home Object Manager ▾
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

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

Information (Header visible on edit only)

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

1

2

5.The 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.

Lightning apps let you brand your apps with a custom Color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your org can work more efficiently by easily switching between apps.

5.1.Create a Lightning App

To create a Lightning app page:

1. Go to the **Setup** page.
2. In the **Quick Find** search bar, type “**App Manager**” and select “**App Manager**.”
3. Click on **New Lightning App**.
 - Fill the app name as **Urban Color** in **App Details and Branding**.
 - Click **Next**.
 - On the **App Options** page, keep the settings as default.
 - Click **Next**.
 - On the **Utility Items** page, keep the settings as default.
 - Click **Next**.

The screenshot shows the Salesforce App Manager interface. At the top, there's a search bar with 'app manager' typed in. Below it, a navigation menu has 'App Manager' selected. To the right of the search bar is a button labeled 'New Lightning App'. A red arrow points from the search bar to the 'app manager' in the menu, and another red arrow points from the 'New Lightning App' button.

The main area displays a table of 33 items, sorted by app name. The columns include App Name, Developer Name, Description, Last Modified, App Type, and Version. Some rows are partially cut off. A red arrow points to the 'Clone (Appx.Beta)' link at the top of the table.

App Name	Developer Name	Description	Last Modified	App Type	V...
1 All Tabs	AllTabSet		04/12/2022, 10:13 am	Classic	
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	04/12/2022, 10:13 am	Classic	
3 App Launcher	AppLauncher	App Launcher tabs	04/12/2022, 10:13 am	Classic	
4 Bot Solutions	LightningBot	Discover and manage business solutions designed for your industry	04/12/2022, 10:16 am	Lightning	
5 Chatter Desktop	Chatter/Desktop	Chatter Desktop is an Adobe AIR-based desktop application that lets Chatter users stay connecte...	29/12/2022, 4:04 pm	Connected (Managed)	
6 Chatter Mobile for BlackBerry	ChatterForBlackBerry	The Salesforce.com Chatter Mobile app lets you access Chatter data on the go. Use it to view fe...	29/12/2022, 4:05 pm	Connected (Managed)	
7 College Management Systems	Naedem	demo app	08/12/2022, 4:16 pm	Lightning	
8 Community	Community	Salesforce CRM Communities	04/12/2022, 10:12 am	Classic	
9 Content	Content	Salesforce CRM Content	04/12/2022, 10:13 am	Classic	
10 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes	04/12/2022, 10:13 am	Lightning	

To Add Navigation Items:

1. Select the items (**Our Customers, Consultants, Retailers, Others, Reports, Dashboards**) from the search bar and move them using the arrow button.
2. Click **Next**.

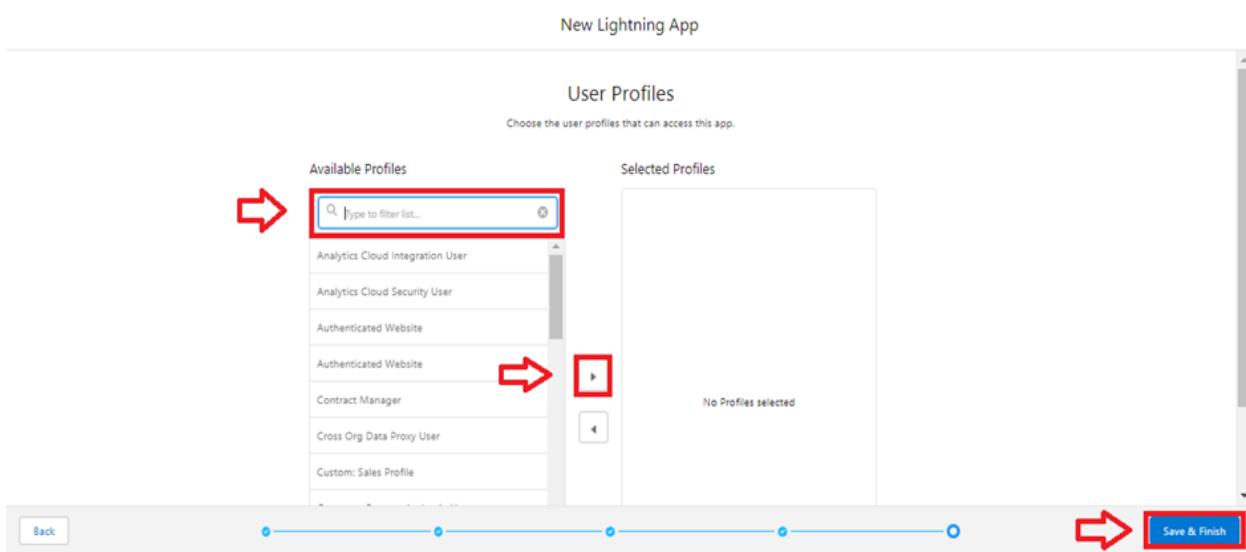
This screenshot shows the 'New Lightning App' configuration page. At the top, it says 'New Lightning App'. Below that, under 'Navigation Items', it says: 'Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.' A red arrow points to the search bar in the 'Available Items' list.

The 'Available Items' list includes: Accounts, Activities, Alert Settings, All Sites, Alternative Payment Methods, App Launcher, and Appointment Invitations. A red arrow points to the right-pointing arrow between the 'Available Items' and 'Selected Items' lists. The 'Selected Items' list is currently empty, showing 'No items selected'. A red arrow points to the 'Next' button at the bottom right of the screen.

To Add User Profiles:

1. Search for **profiles (System Administrator)** in the search bar.

2. Click on the arrow button to add the profile.
3. Click **Save & Finish**.



6.Profile

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.

6.1.Creating a Profile

Creating a Store Supervisor Profile and Setting Object Permissions:

1. From **Setup**, enter **Profiles** in the **Quick Find** box, and select **Profiles**.
2. From the list of profiles, find **Standard User**.
3. Click **Clone**.
4. For **Profile Name**, enter **Store Supervisor**.
5. Click **Save**.

The screenshot shows the Salesforce Setup interface. In the top navigation bar, 'Setup' is selected. The search bar contains 'prof'. On the left sidebar, 'Users' is expanded, and 'Profiles' is selected. The main content area has a title 'Profiles' with a 'SETUP' icon. Below it is a 'Clone Profile' section. It says 'Enter the name of the new profile.' and 'You must select an existing profile to clone from.' A note at the bottom right indicates that a red exclamation mark means 'Required Information'. The 'Existing Profile' dropdown is set to 'Standard User'. The 'User License' dropdown is set to 'Salesforce'. The 'Profile Name' input field contains 'Store Supervisor'. At the bottom are 'Save' and 'Cancel' buttons.

6. While still on the **Store Supervisor** profile page, click **Edit**.
7. Scroll down to **Custom Object Permissions** and give access for **Create, Read, Edit, Delete, View All, and Modify All** for the **Our Customers, Consultants, Retailers, Others** objects.

8. Scroll down to **Custom App Settings** and give access to **Urban Color**.
9. Click on **Save**.

To Create a New Profile:

1. Go to **Setup**.
2. Type **Profiles** in the **Quick Find** box.
3. Click on **Profiles**.
4. Clone the desired profile (**Standard User** is preferable).
5. Enter the **Profile Name**.
6. Click **Save**.
7. While still on the profile page, click **Edit**.

8. Scroll down to the **Custom Object Permissions** and give all access to the **Consultants, Others, Our Customers, Retailers** objects.
9. Click on **Save**.

Similarly, Create an Operator Profile:

1. Clone the **Salesforce Platform** user profile.
2. Give access only for **Billing Operator**.

The screenshot shows two stacked configuration pages from the Salesforce Setup interface.

Profile Edit (Billing Operator):

- Name:** Billing Operator
- User License:** Salesforce
- Description:** (Empty text area)
- Buttons:** Save, Save & New, Cancel

Help for this Page ?

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:** (unchecked)
- Require a minimum 1 day password lifetime:** (unchecked)
- Don't immediately expire links in forgot password emails:** (unchecked)

Buttons: Save, Save & New, Cancel

3. Click on **Save**.

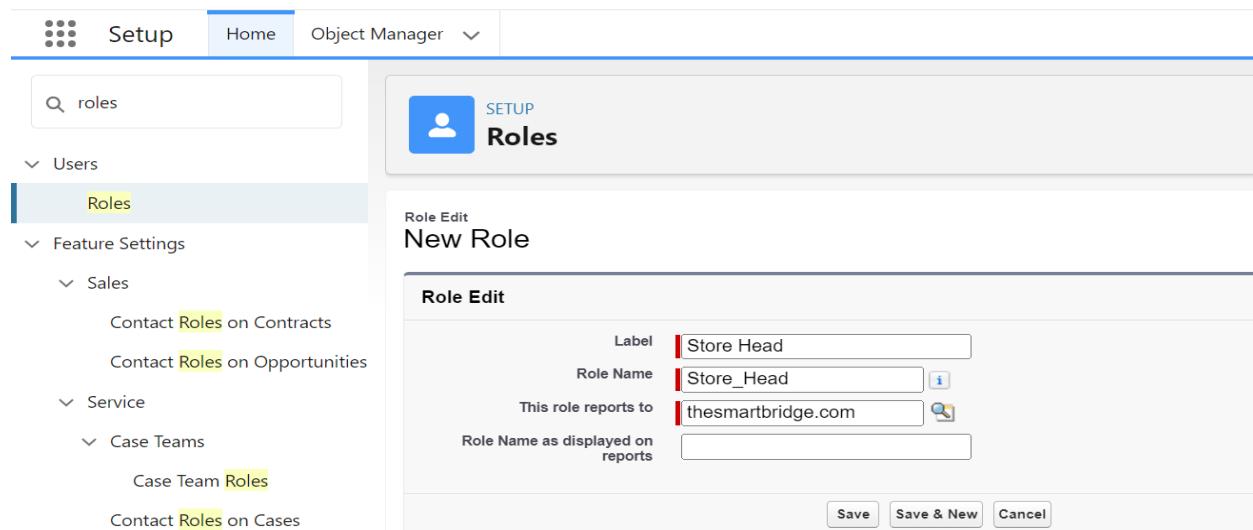
7. Setup Roles

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

Setup Roles

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 in the **Label** as **Store Head**, and the **Role Name** as **Store_Head**.
9. Enter a **Role Name** that will be displayed on reports.
10. Click on **Save**.

Similarly, create one role under Store Head as Billing Operator.



Sales

Contact Roles on Contracts

Contact Roles on Opportunities

Service

Case Teams

Case Team Roles

Contact Roles on Cases

Didn't find what you're looking for?
Try using Global Search.

Role Edit
New Role

Role Edit

Label: Billing Operator

Role Name: Billing_Operator

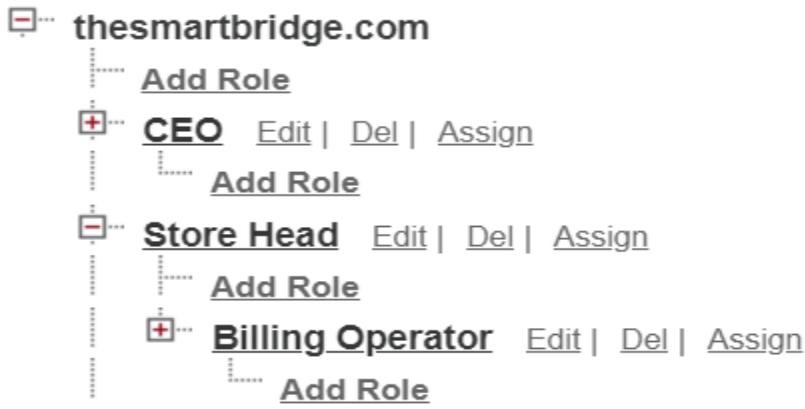
This role reports to: Store Head

Role Name as displayed on reports:

Save Save & New Cancel

Your Organization's Role Hierarchy

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

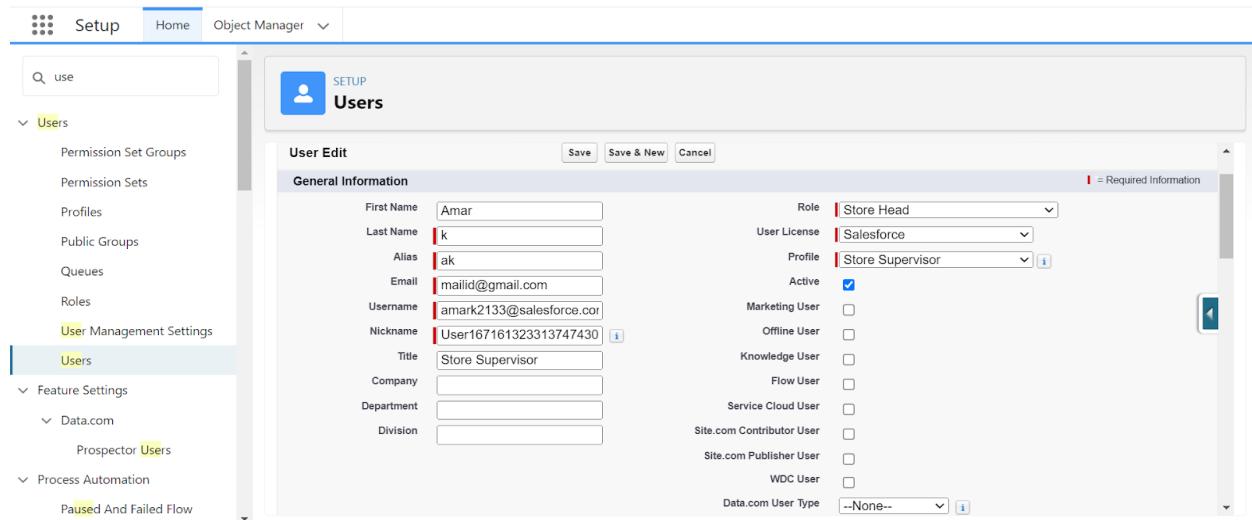


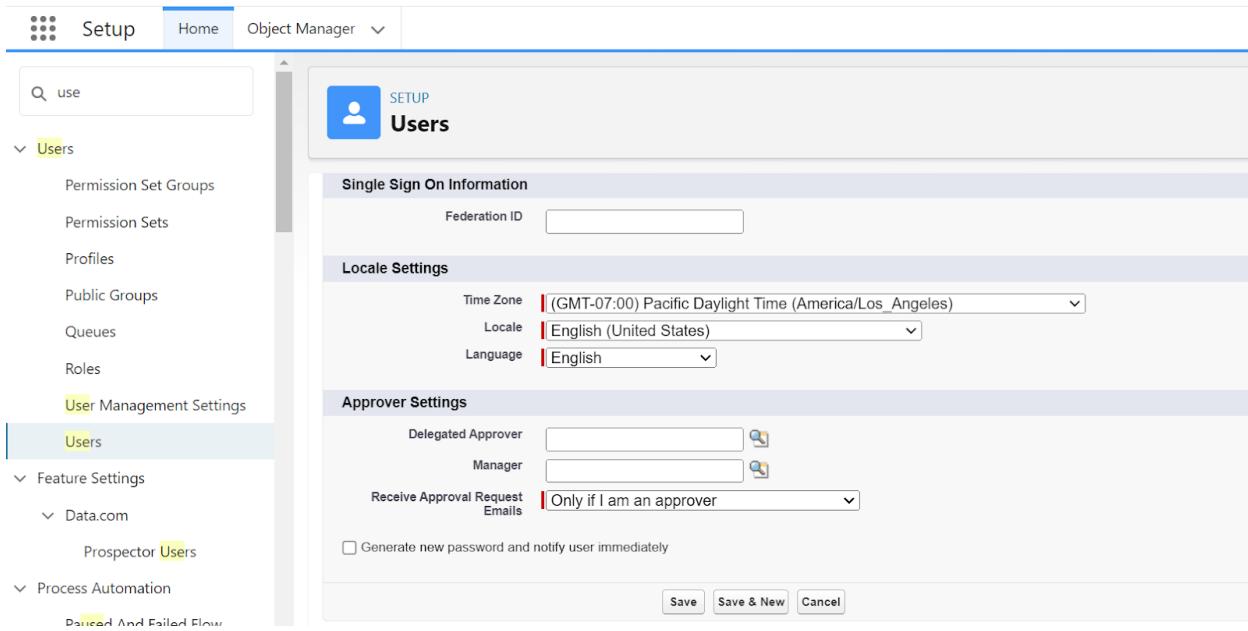
8. Users

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account.

Creating a User:

1. From **Setup**, in the **Quick Find** box, enter **Users**, and then select **Users**.
2. Click **New User**.
3. Enter the user's name as **Amar K** and your email address, and create 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** as **Store Head**.
5. Select a **User License** 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.
8. Fill in the fields (First Name, Last Name, Alias, Email ID, Username, Nickname, Role, User License, Profile).
9. Click **Save**.





Second User Creation:

1. From **Setup**, in the **Quick Find** box, enter **Users**, and then select **Users**.
2. Click **New User**.
3. Enter the user's name as **John Teddy** and your email address, and create 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** as **Billing Operator**.
5. Select a **User License** as **Salesforce Platform**.
6. Select a **Profile** as **Billing Operator**.
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.
8. Fill in the fields (First Name, Last Name, Alias, Email ID, Username, Nickname, Role, User License, Profile).
9. Click **Save**.

Setup Home Object Manager

Q user

Users

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users**
- Feature Settings
- Data.com
- Prospector Users
- User Interface
- Action Link Templates
- Actions & Recommendations
- App Menu
- Custom Labels
- Density Settings
- Global Actions

SETUP Users

User Edit

General Information

First Name	John	Role	Billing Operator
Last Name	Teddy	User License	Salesforce Platform
Alias	Tedd	Profile	Billing Operator
Email	teddyjohn@gmail.com	Active	<input checked="" type="checkbox"/>
Username	johnteddy@salesforce.com	Marketing User	<input type="checkbox"/>
Nickname	User167160299867441831	Offline User	<input type="checkbox"/>
Title	Vehicle Manager	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"/>

Required Information

Data.com User Type: None

Data.com Monthly Addition Limit: 300

Accessibility Mode (Classic Only):

High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling:

Debug Mode:

Make Setup My Default Landing Page:

Save Save & New Cancel

Setup Home Object Manager

Q use

Users

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users**
- Feature Settings
- Data.com
- Prospector Users
- Process Automation
- Paused And Failed Flow

SETUP Users

Single Sign On Information

Federation ID: []

Locale Settings

Time Zone: (GMT-07:00) Pacific Daylight Time (America/Los_Angeles)

Locale: English (United States)

Language: English

Approver Settings

Delegated Approver: []

Manager: []

Receive Approval Request Emails: Only if I am an approver

Generate new password and notify user immediately

Save Save & New Cancel

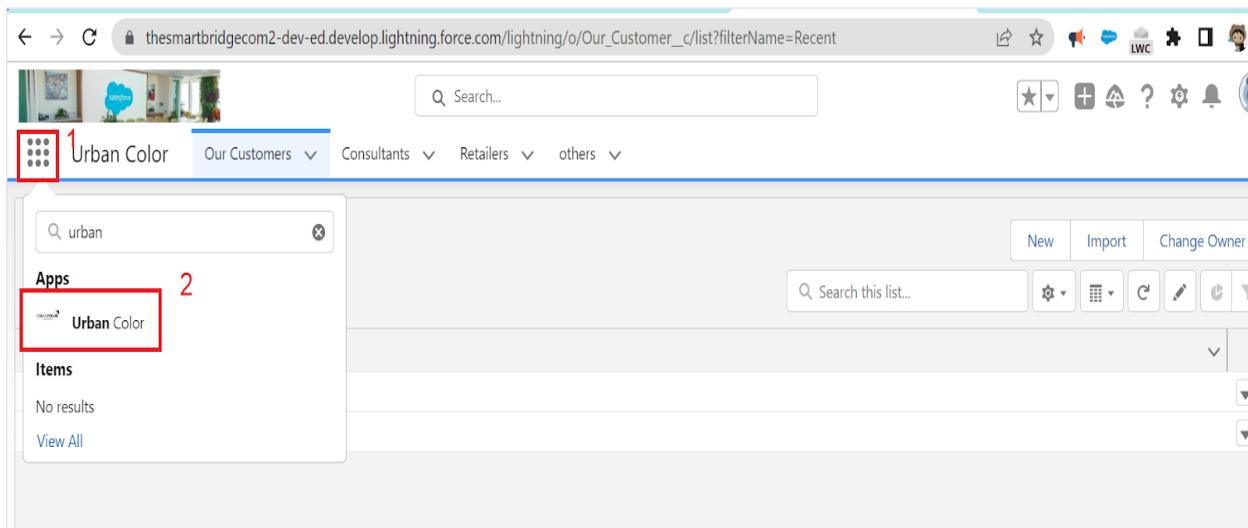
9. User Adoption

We need to understand user adoption and navigation. How to interact with database and their records.

To ensure effective **user adoption** and navigation, it's important to educate users on how to interact with the Salesforce database and manage records. The following steps outline key areas to focus on:

Create Our Customer Record

1. Click on the **App Launcher** on the left side of the screen.
2. Search for **Urban Color** and click on it.
3. Click on the **Our Customer** tab.
4. Click the **New** button.
5. Fill in all the **Our Customer** record details.
6. Click on the **Save** button.



The screenshot shows the Salesforce application window. At the top, there is a navigation bar with various icons and links: 'Urban Color', 'Our Customers' (which is highlighted with a red box and a red number '1'), 'Consultants', 'Retailers', and 'others'. Below the navigation bar is a search bar labeled 'Search...'. On the right side of the header are several small icons. The main content area is titled 'Our Customers' with a sub-section 'Recently Viewed'. It displays a message '0 items • Updated a few seconds ago'. There is a column header 'Customer Name' with a checkbox. A message at the bottom says 'You haven't viewed any Our Customers recently.' In the top right corner of the content area, there are buttons for 'New' (highlighted with a red box and a red number '2'), 'Import', and 'Change Owner'. Below these buttons is a search bar labeled 'Search this list...' and a set of filter and sort icons.

View Record (Our Customer)

1. Click on the **App Launcher** on the left side of the screen.
2. Search for **Urban Color** and click on it.
3. Click on the **Our Customer** tab.
4. Click on any **record name** to view the details of the **Our Customer**.

The screenshot shows the 'Information' tab for a customer record. The tab title is 'Information' (marked with a red number '1'). The form contains the following fields:

- * Customer Name: An input field with a red border, indicating it is required. A red box highlights this field, and a red number '1' is placed above it. A red message below the field says 'Complete this field.'
- Owner: Shows 'Hazari Ajay Kumar' with a small user icon.
- Customer id: A text input field.
- * Phone: An input field with a red border, indicated by a red number '2' above it.
- Email id: An input field.

At the bottom of the form, there are three buttons: 'Cancel', 'Save & New', and 'Save' (highlighted with a red box and a red number '2').

The screenshot shows the Odoo application interface. At the top, there is a navigation bar with the company name "Urban Color" and several dropdown menus: "Our Customers" (highlighted with a red box and labeled 1), "Consultants", "Retailers", and "others". Below the navigation bar is a search bar with the placeholder "Search this list..." and various filter and sorting icons. A "Recently Viewed" section shows two items: "Suresh" (highlighted with a red box and labeled 2) and "Kamal". On the left, there is a sidebar titled "Our Customer" with the name "Suresh" displayed prominently. The main content area is divided into two tabs: "Related" and "Details". The "Details" tab is selected and contains the following fields:

Customer Name	Suresh	Owner
Customer id	5	Hazari Ajay Kumar
Phone	97583873728	
Email id	suresh@gmail.com	
Address	Hyderabad	
Additional Information		
Customer		

Delete Record (Our Customer)

1. Click on the **App Launcher** on the left side of the screen.
2. Search for **Urban Color** and click on it.
3. Click on the **Our Customer** tab.
4. Click on the **Arrow** on the right-hand side of the particular record.
5. Click **Delete**, and then confirm by clicking **Delete** again.

1

2

3

Delete Our Customer

Are you sure you want to delete this Our Customer?

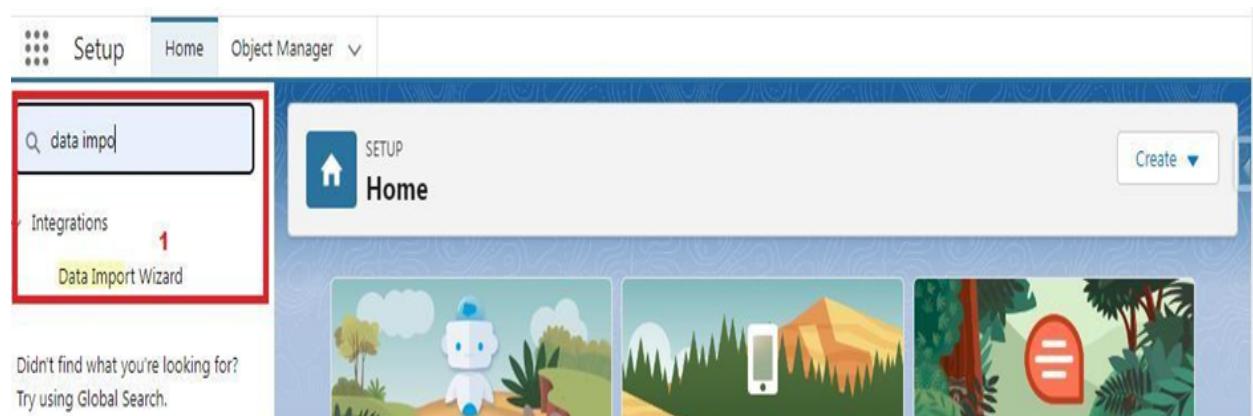
Cancel Delete

10. Import Data

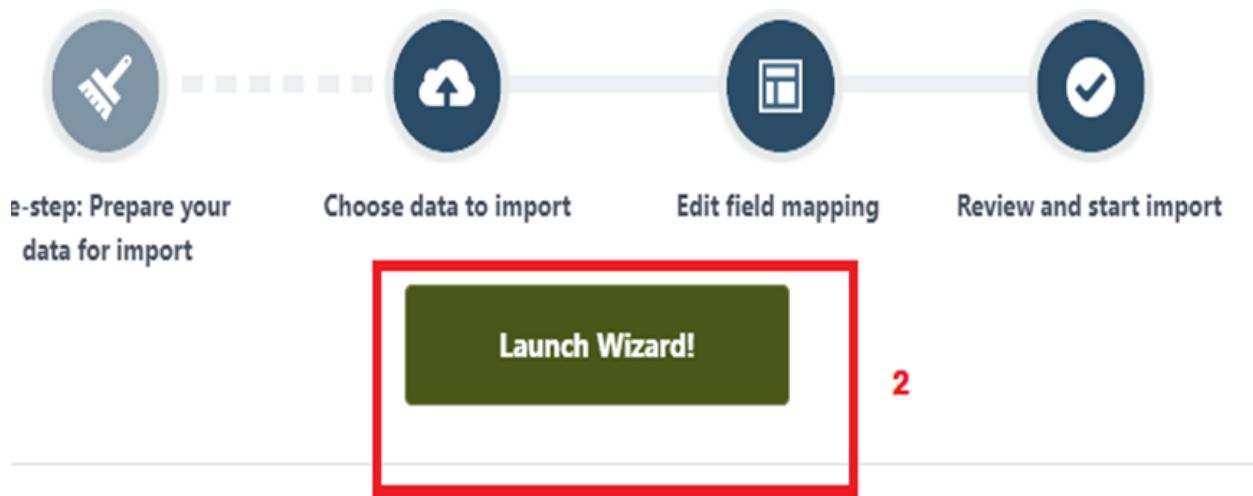
Data Import Wizard—This tool, accessible through the **Setup** menu, allows you to import data into common standard objects such as **Contacts**, **Leads**, **Accounts**, as well as data into custom objects.

To Import Data

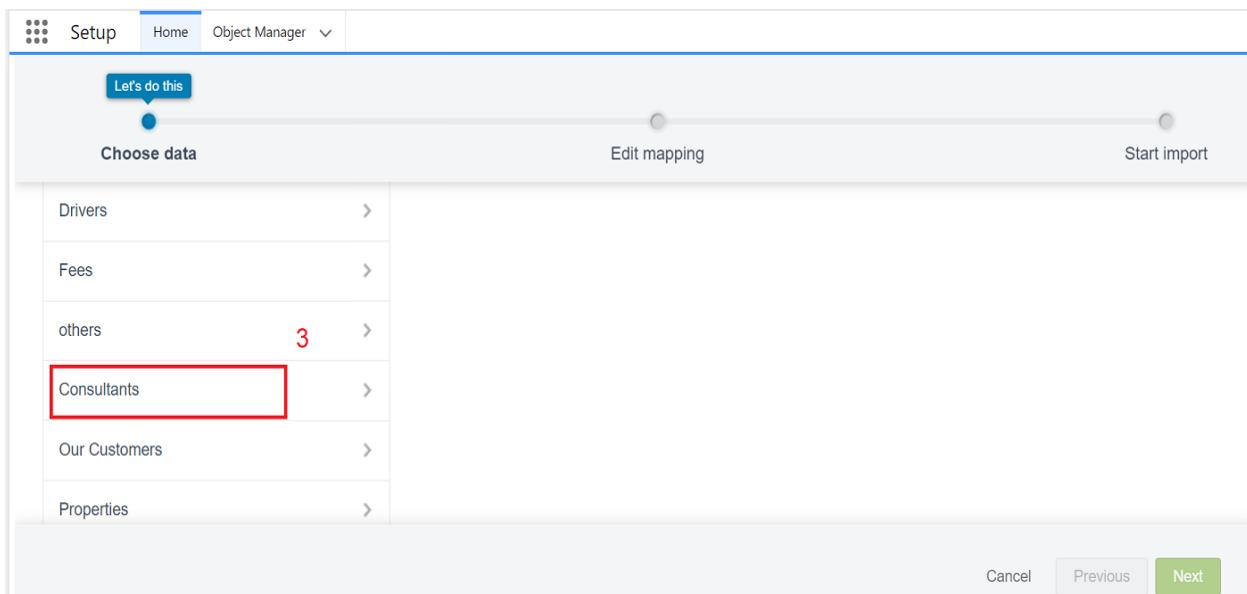
1. From **Setup**, click the **Home** tab.
2. In the **Quick Find** box, enter **Data Import** and select **Data Import Wizard**.



3. Click **Launch Wizard!**



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



5. Select **Add New Records**.

Import your Data into Salesforce

You can import up to 50,000 records at a time.

This section of the import wizard asks 'What do you want to do?'. It has three options: 'Add new records' (highlighted with a red box and a red '4'), 'Update existing records', and 'Add new and update existing records'. To the left, there are tabs for 'Standard objects' and 'Custom objects', and a sidebar with 'Attendees' and 'Buyers'.

6. Click **CSV** and choose the file **Consultant_CSV** which was created earlier. Click **Next**.

Choose data

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 file here to upload

CSV 5

Cancel Previous Next

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

Setup Home Object Manager ?

Choose data Edit mapping Almost done Start import

Edit Field Mapping: Consultants Help for this page

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	784653673	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**.

Choose data Edit mapping Start import

Help for this page ⓘ

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	Retry Count	State Message	Status
View Request	View Result	7512w00000Xqrar	6/19/2023, 11:05 PM	6/19/2023, 11:05 PM	103	52	0	9	0	0	Completed	

11. Make sure you have **0 records** under the **Records Failed** column.

Note: Perform **Field Mapping** carefully.

Here is the formatted text for your document:

11.What are Reports?

Reports

Reports in Salesforce are lists of records that meet specific criteria, providing answers to particular questions. These records are displayed in a table format that can be filtered or grouped based on any field.

There are 4 types of report formats in Salesforce:

1. Tabular Reports:

- The most basic report format, displaying rows of records in a table with a grand total.
- Easy to set up but cannot be used to create groups of data or charts and cannot be used in Dashboards.
- Primarily used to generate simple lists or lists with a grand total.

2. Summary Reports:

- The most commonly used report format, allowing the grouping of rows of data, viewing subtotals, and creating charts.

3. Matrix Reports:

- The most complex report format, summarizing information in a grid format.
- Allows records to be grouped by both columns and rows.
- Can be used to generate dashboards and add charts.

4. Joined Reports:

- Allows the creation of different views of data from multiple report types.
- Data in joined reports is organized in blocks, each acting as a subreport with its own fields, columns, sorting, and filtering.
- Used to group and show data from multiple report types in different views.

Report Types:

A **Report Type** determines which set of records will be available in a report. Each report is based on a particular report type, selected first when creating a report. Every report type has a primary object and one or more related objects, all of which must be linked together directly or indirectly.

- A report type cannot include more than 4 objects.
- Once a report is created, its report type cannot be changed.

There are 2 types of report types:

1. Standard Report Types:

- Automatically included with standard objects and custom objects where "Allow Reports" is checked.
- Cannot be customized and automatically include standard and custom fields for each object within the report type.
- Created when an object or a relationship is created.
- **Note:** Standard report types always have inner joins.

2. Custom Report Types:

- Created by an administrator or user with "Manage Custom Report Types" permission when standard report types cannot specify which records will be available in reports.
- Allows specification of objects that will be available in a particular report.
- The primary object must have a relationship with other objects present in the report type, either directly or indirectly.

There are 3 types of access levels for folders:

1. Viewer:

- Users can see the data in a report but cannot make any changes except cloning it into a new report.

2. Editor:

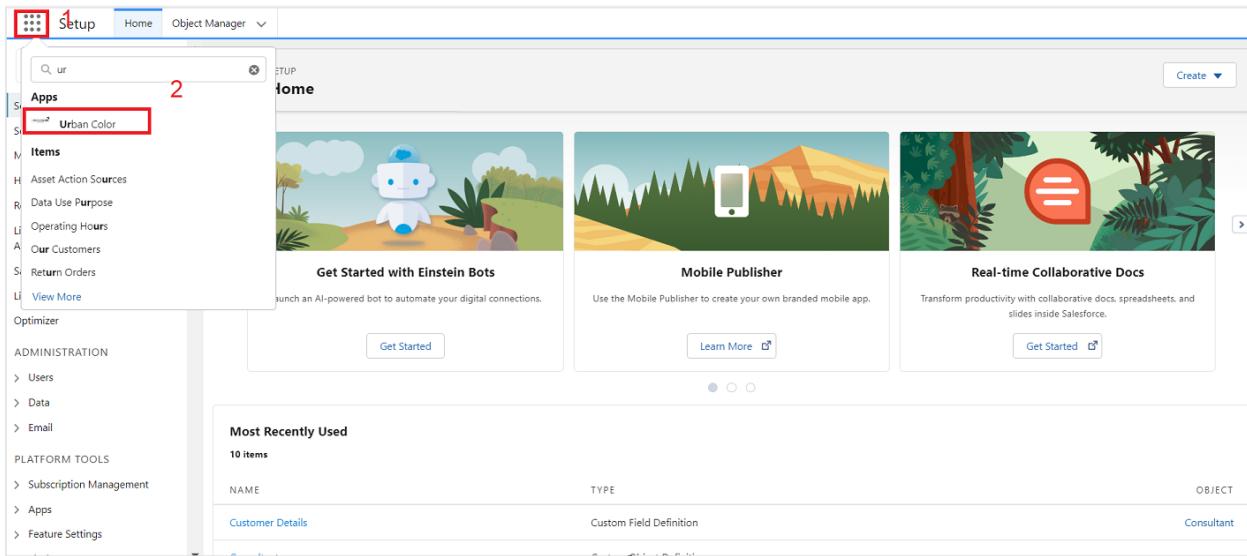
- Users can view and modify the reports and move them to/from any other folders they have access to as Editor or Manager.

3. Manager:

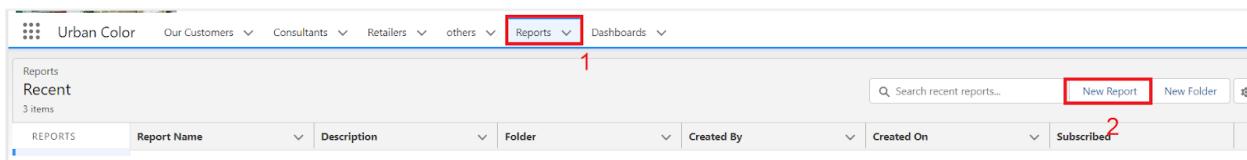
- Users can do everything Viewers and Editors can do, plus control other users' access levels to the folder.
- Managers can also delete the report.

11.1.Create Report

1. Click **App Launcher**.
2. Select **Urban Color App**.
3. Click the **Reports** tab.



4. Click New Report.



5. Select the report type as **Consultants** and click **Start Report**.

6. Customize your report by selecting the following columns: **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

7. Click the drop-down option on the **Payment** column and select **Bucket This Column**.

8. Name the bucket **Payment Type**.

All Values (4)	
Unbucketed Values (4)	
<input type="checkbox"/> Credit Card <input type="checkbox"/> Debit Card <input type="checkbox"/> Upi <input type="checkbox"/> Cash	
<input type="checkbox"/> Bucket remaining values as Other	
<input type="button" value="Add Bucket"/> <input type="button" value="Move To"/>	

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

9. Click **Add Bucket** and name it **NetBanking**.

10. Click **Add Bucket** and name it **Cash**.

Edit Bucket Column

* Field	X	* Bucket Name																												
Payment	X	Payment type																												
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%; padding: 5px;">All Values (4)</td> <td style="width: 70%; padding: 5px; text-align: right;">Search Values <input type="text"/></td> </tr> <tr> <td colspan="2"> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 10%;"></th> <th style="width: 40%; text-align: left;">VALUE</th> <th style="width: 50%;">BUCKET</th> </tr> </thead> <tbody> <tr><td><input type="checkbox"/></td><td>Credit Card</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>Debit Card</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>Upi</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>Cash</td><td></td></tr> </tbody> </table> </td> </tr> <tr> <td colspan="3"> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%; padding: 5px;">Unbucketed Values (4)</td> <td style="width: 70%; padding: 5px;"></td> </tr> <tr> <td colspan="2"> <input type="checkbox"/> Bucket remaining values as Other </td> </tr> <tr> <td style="padding: 5px; text-align: left;"> Add Bucket </td> <td style="padding: 5px; text-align: right;"> Move To ▾ </td> </tr> </table> </td> </tr> </table>			All Values (4)	Search Values <input type="text"/>	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 10%;"></th> <th style="width: 40%; text-align: left;">VALUE</th> <th style="width: 50%;">BUCKET</th> </tr> </thead> <tbody> <tr><td><input type="checkbox"/></td><td>Credit Card</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>Debit Card</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>Upi</td><td></td></tr> <tr><td><input type="checkbox"/></td><td>Cash</td><td></td></tr> </tbody> </table>			VALUE	BUCKET	<input type="checkbox"/>	Credit Card		<input type="checkbox"/>	Debit Card		<input type="checkbox"/>	Upi		<input type="checkbox"/>	Cash		<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%; padding: 5px;">Unbucketed Values (4)</td> <td style="width: 70%; padding: 5px;"></td> </tr> <tr> <td colspan="2"> <input type="checkbox"/> Bucket remaining values as Other </td> </tr> <tr> <td style="padding: 5px; text-align: left;"> Add Bucket </td> <td style="padding: 5px; text-align: right;"> Move To ▾ </td> </tr> </table>			Unbucketed Values (4)		<input type="checkbox"/> Bucket remaining values as Other		Add Bucket	Move To ▾
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<input type="checkbox"/> Bucket remaining values as Other																														
Add Bucket	Move To ▾																													
Cancel Apply																														

11. Click on **All Values**, select **Credit Card**, **Debit Card**, **UPI**, and move them to **NetBanking**.

Edit Bucket Column

* Field	X	* Bucket Name																												
Payment	X	Payment type																												
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<input type="checkbox"/> 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)
- Bucket remaining values as Other

Move To ▾

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

Add Bucket

Edit Bucket Column

* Field: Payment * Bucket Name: Payment type

All Values (4)

- Net Banking (3)
- Cash (1)**
- Unbucketed Values (0)
- Bucket remaining values as Other

Move To ▾

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

Add Bucket

Cancel **Apply**

12. Click on **All Values** again, select **Cash**, and move it to **Cash**.

13. Click **Apply**.

14. In Group Rows, add the **Payment Type Bucket** field.

REPORT ▾
New Consultants Report ▾ Consultants

Fields >

Groups

- GROUP ROWS
- Add group...
- Payment type**

Columns

- Add column...
- Consultant: Consultant Name
- Delivery Type
- Products
- Payment

Payment type

Net Banking (7)

Consultant: Consultant Name	Delivery Type	Products	Payment
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)

15. Click **Refresh**.

16. Click **Save and Run**.

17. Give the report a name, e.g., **Consultant Report**.

REPORT ▾

New Consultants Report **Consultants**

Fields > **Outline**

Groups

- GROUP ROWS**
- Add group...
- Payment type**

GROUP COLUMNS

- Add group...

Columns

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

Payment type ↑ ↓

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

Net Banking (7)

Consultant: Consultant Name	Delivery Type	Products	Payment
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)

18. Click **Save**.

Save Report

1 ***Report Name**

Consultants Report

Report Unique Name

Consultants_Report_hvb

Report Description

2 **Folder**

Private Reports

Select Folder

3 **Save**

11.2. View Report

1. Click on the **App Launcher** on the left side of the screen.
2. Search for **Urban Color App** and click on it.

The screenshot shows the Salesforce Setup Home page. At the top left, there's a 'Setup' icon with a red box labeled '1'. To its right are 'Home' and 'Object Manager' buttons. Below the header is a search bar with the placeholder 'Q_ ur' and a 'Create' button. On the left, a sidebar lists various setup categories like 'Apps', 'Items', 'Optimizer', 'ADMINISTRATION', and 'PLATFORM TOOLS'. The main area features three cards: 'Get Started with Einstein Bots', 'Mobile Publisher', and 'Real-time Collaborative Docs'. Below these is a section titled 'Most Recently Used' with a table showing 'Customer Details' as the most recent item. A red box labeled '2' highlights the 'Customer Details' row.

3. Click the **Reports** tab.

4. Click on the **Urban Color Report** to view the records.

The screenshot shows the Salesforce Reports page. At the top, there's a navigation bar with tabs for 'Urban Color', 'Our Customers', 'Consultants', 'Retailers', 'others', 'Reports' (which has a red box labeled '3'), and 'Dashboards'. Below the navigation is a search bar and buttons for 'New Report' and 'New Folder'. The main area is divided into sections: 'Recent' (with 4 items), 'Created by Me', 'Private Reports', 'Public Reports' (which has a red box labeled '4'), 'All Reports', 'FOLDERS', 'All Folders', 'Created by Me', 'Shared with Me', and 'FAVORITES'. The 'Recent' section lists reports like 'Consultants Report' (selected), 'Sample Flow Report: Screen Flows', 'Opportunities Details', and 'Rental New 1'. The 'Public Reports' section lists 'Consultants Report' (selected), 'Sample Flow Report: Screen Flows', 'Opportunities Details', and 'Rental New 1'.

12.Dashboards

Dashboards let you curate data from reports using charts, tables, and metrics. If your colleagues need more information, then they're able to view your dashboard's data supplying reports. Dashboard filters make it easy for users to apply different data perspectives to a single dashboard.

12.1.Create Dashboard

Here's a step-by-step guide to creating a dashboard in the Urban Color application:

- 1.
2. **Open the Urban Color Application:** Launch the application and navigate to the Dashboards tab.
3. **Create a New Dashboard:**
 - Click on the "New Dashboard" button.
4. **Name Your Dashboard:**
 - Enter "Consultant Dashboard" in the name field.
 - Click "Create."

New Dashboard

* Name 3

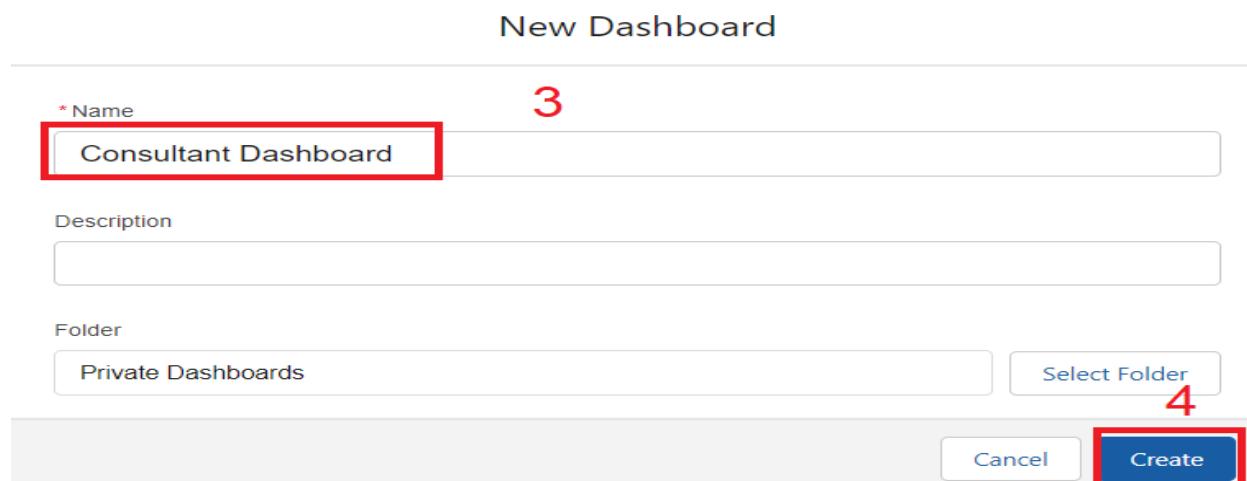
Consultant Dashboard

Description

Folder

Private Dashboards Select Folder 4

Cancel Create



5. **Add Components to the Dashboard:**
 - Click on "+ Component" to add a new component.
 - Select the "Consultants Report" you created earlier.

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...

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, 2023, 10:43 PM · Public Reports

Cancel Select

6. Choose Data Visualization:

- Pick a visualization type (e.g., chart, table) that best suits your data and needs.
- Click "Add."

Add Component

Report

Consultants Report

Use chart settings from report

Display As

Payment type

X-Axis

Record Count

Preview

Consultants Report

Record Count

Net Banking 7

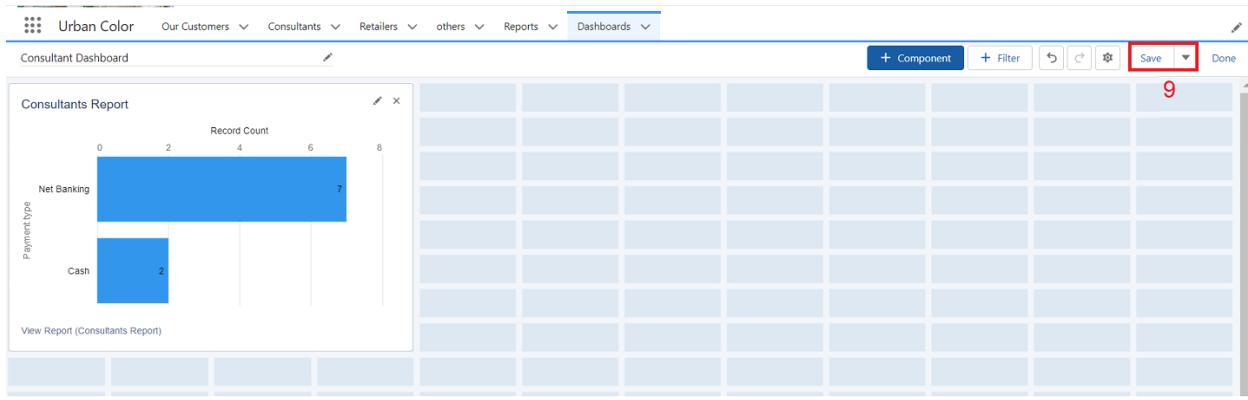
Cash 2

View Report (Consultants Report)

Cancel Add

7. Save Your Dashboard:

- After configuring the components and visualizations, click "Save" to finalize your dashboard.



12.2. View Dashboard

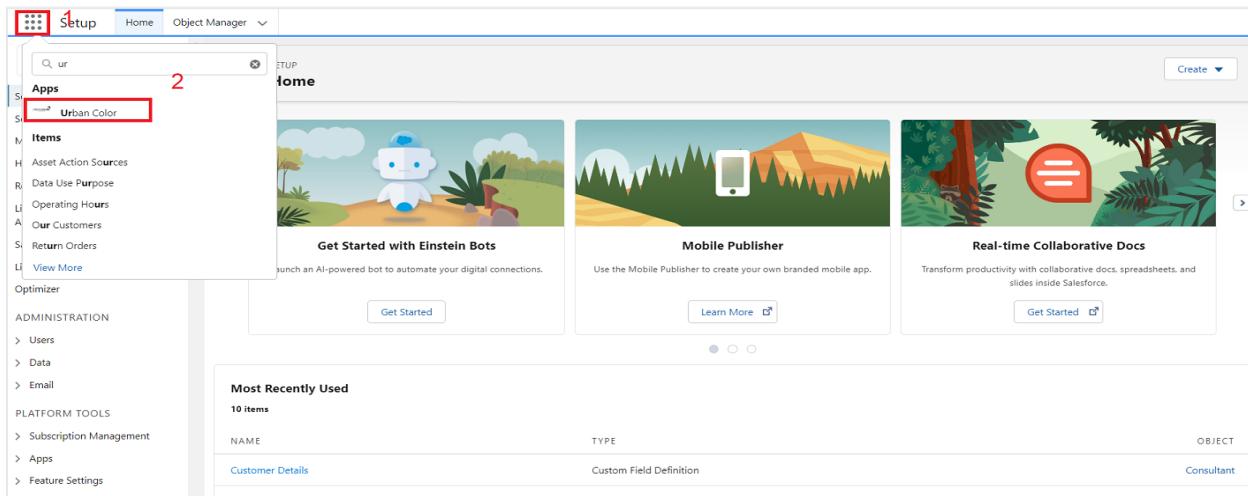
To view the dashboard, follow these steps:

1. Open the App Launcher:

- Click on the App Launcher icon on the left side of the screen.

2. Search for the Dashboard:

- Type "Candidate Internal Result Card" into the search bar.
- Click on the "Candidate Internal Result Card" option that appears.



3. Navigate to the Dashboard Tab:

- Once in the Candidate Internal Result Card view, click on the "Dashboard" tab.

4. View the Graph:

- Click on the "Candidate Internal Result Card" to see the graph view of the records.

The screenshot shows a user interface for managing dashboards. At the top, there is a navigation bar with links: Urban Color, Our Customers, Consultants, Retailers, others, Reports, Dashboards, and a search bar labeled 'Search recent dashboards...'. A red box highlights the 'Dashboards' link in the navigation bar, and a red number '3' is positioned to its right. Below the navigation bar, there is a section titled 'Recent' with a subtitle '3 items'. This section contains a table with columns: DASHBOARDS, Dashboard Name, Description, Folder, Created By, Created On, and Subscribed. The table rows are: 1. Recent: Consultant Dashboard (highlighted with a red box and a red number '4'), Private Dashboards, Hazari Ajay Kumar, 6/20/2023, 10:46 PM. 2. Created by Me: Opportunities Details, Private Dashboards, Hazari Ajay Kumar, 4/12/2023, 11:57 PM. 3. Private Dashboards: Oppurunity details, Private Dashboards, Hazari Ajay Kumar, 4/12/2023, 11:48 PM. To the left of the main content area, there are sidebar links: Dashboards, Recent, Created by Me, Private Dashboards, All Dashboards, and FOLDERS.

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	Oppurunity details		Private Dashboards	Hazari Ajay Kumar	4/12/2023, 11:48 PM	