

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:

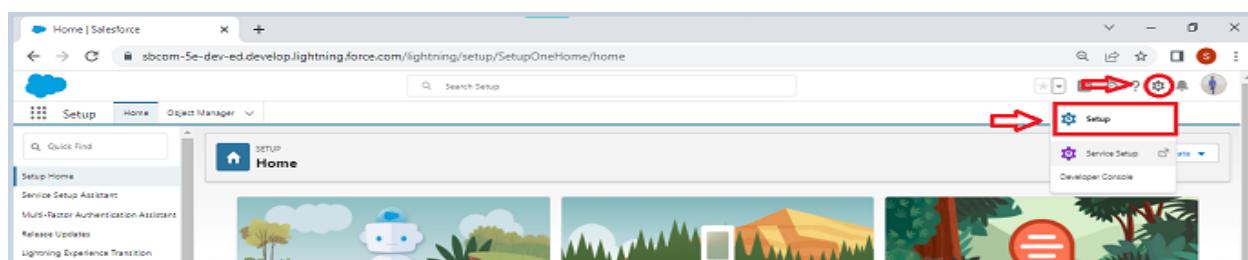
Creation of Objects for Urban Color, For this Urban Color we need to create 3 objects i.e., Our Customers, Consultants, Retailers, others.

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.





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	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 objects follow below data types:

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

	2)Compact 3)EyeLiner 4)FacePack 5)Lip Balm 6)Nail Polish	Multi-Picklist
7	Payment 1)Debit Card 2)Credit Card 3)UPI 4)Cash	Picklist
8	Customer details	Lookup(Our Customers Object)
9	Address	Text Long

Fields in Retailers objects

Fields in Retailers objects follow below data types:

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

Fields in Others objects

Fields in Others objects follow below data types:

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

In the Cosmetic Store Management System built on Salesforce, fields and relationships are designed to streamline operations and enhance data management. Key fields include customer details (e.g., contact information and purchase history), product specifics (e.g., SKU, price, and inventory levels), order details (e.g., order status and shipping info), marketing campaign attributes, and case management elements. Relationships are structured to connect these fields efficiently: customers can have multiple orders and cases, each order can include multiple products, and products are linked to inventory and suppliers.

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 left sidebar has a 'Page Layouts' section highlighted with a red box and the number '1'. The main area displays a table titled 'Page Layouts' with one item, 'Consultant Layout', listed. 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 in the browser bar is 'thesmarbridgecom2-dev-ed.lightning.force.com/lightning.../view'.

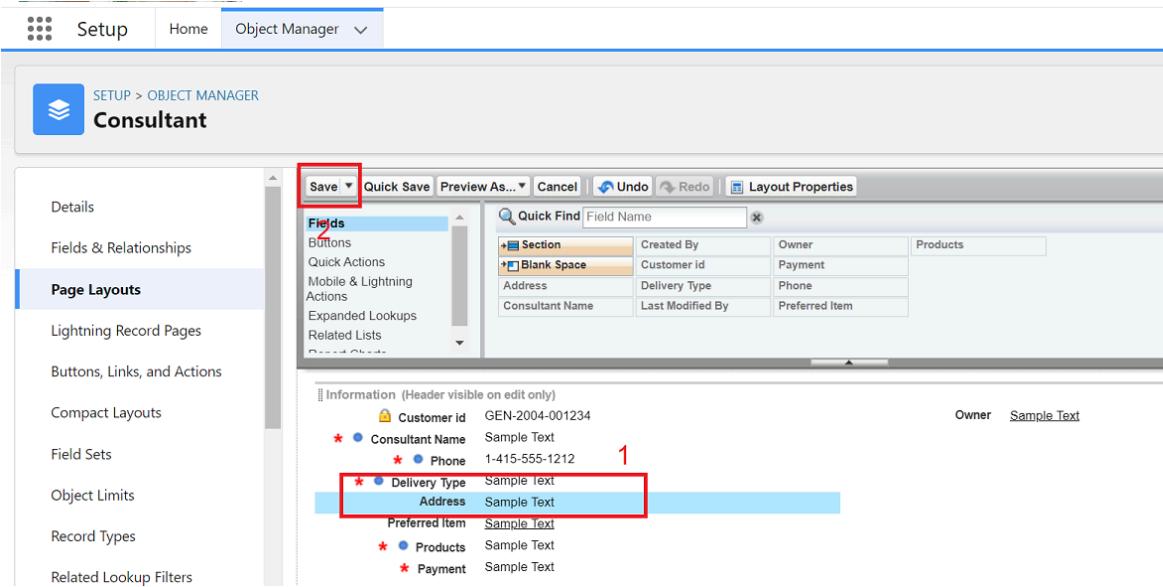
PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Consultant Layout	Hazari Ajay Kumar, 4/1/2023, 7:25 AM	Hazari Ajay Kumar, 6/18/2023, 10:30 PM

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

The screenshot shows the Salesforce Object Manager interface for the 'Consultant' object, specifically the 'Page Layouts' editor. The left sidebar has a 'Page Layouts' section highlighted with a red box. The main area shows the 'Fields' section of the page layout editor. A red arrow points from the 'Delivery Type' field in the 'Information' section at the bottom to its position in the 'Fields' grid. The 'Fields' grid includes fields like Customer id, Consultant Name, Phone, Preferred Item, Products, Payment, and Delivery Type.

Field Name	Created By	Owner	Products
Customer id	GEN-2004-001234	Sample Text	
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		

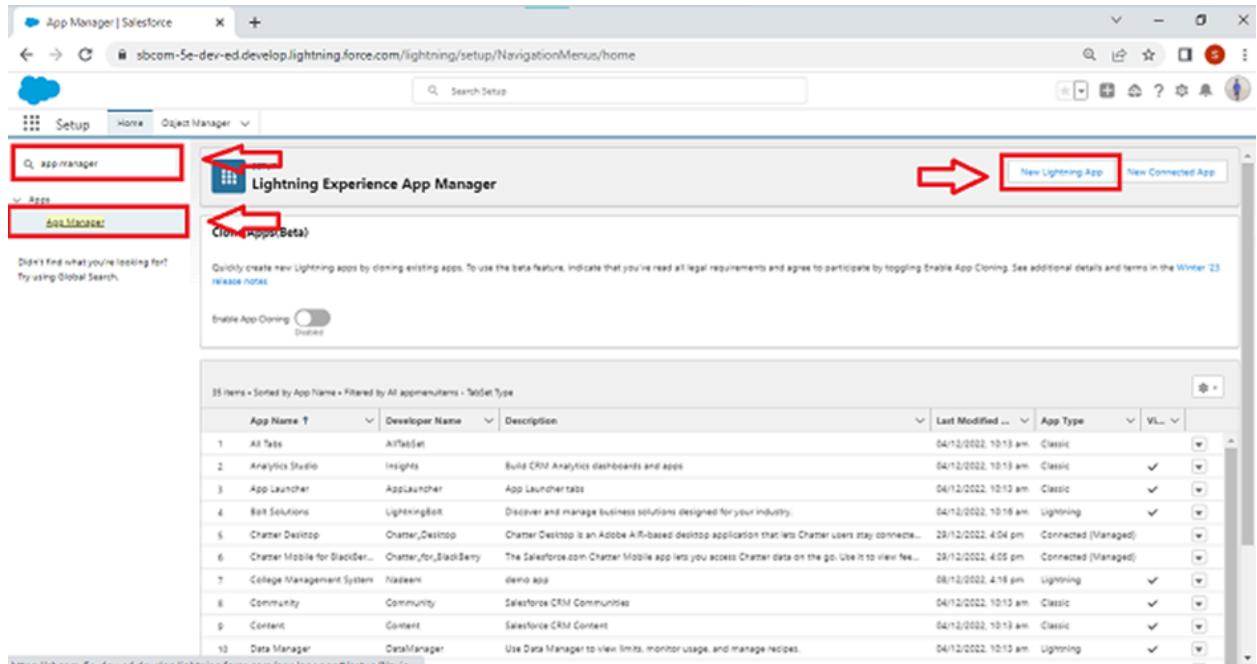
5. Click on Save



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



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

New Lightning App

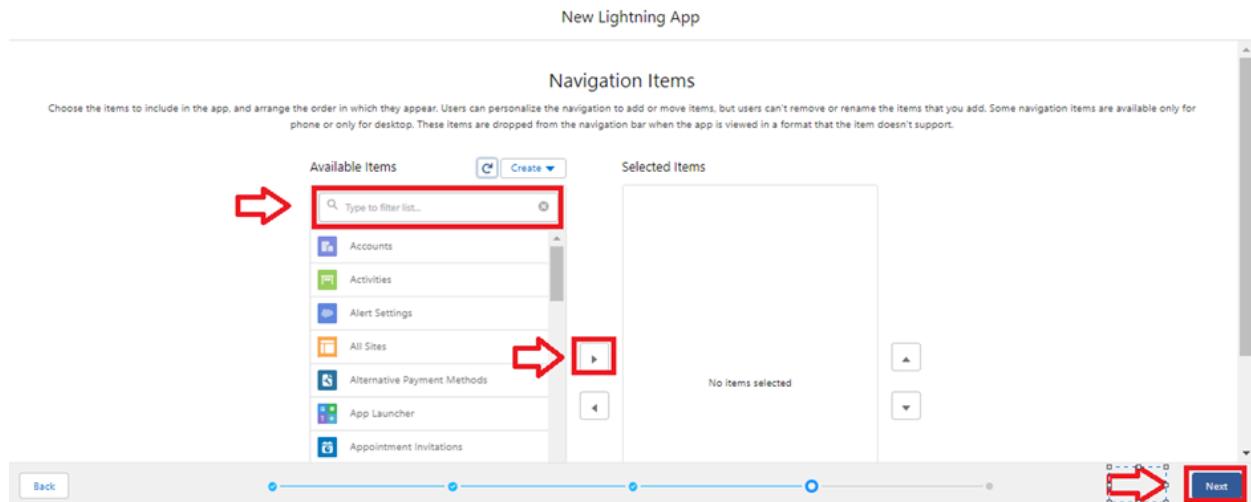
App Details & Branding

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

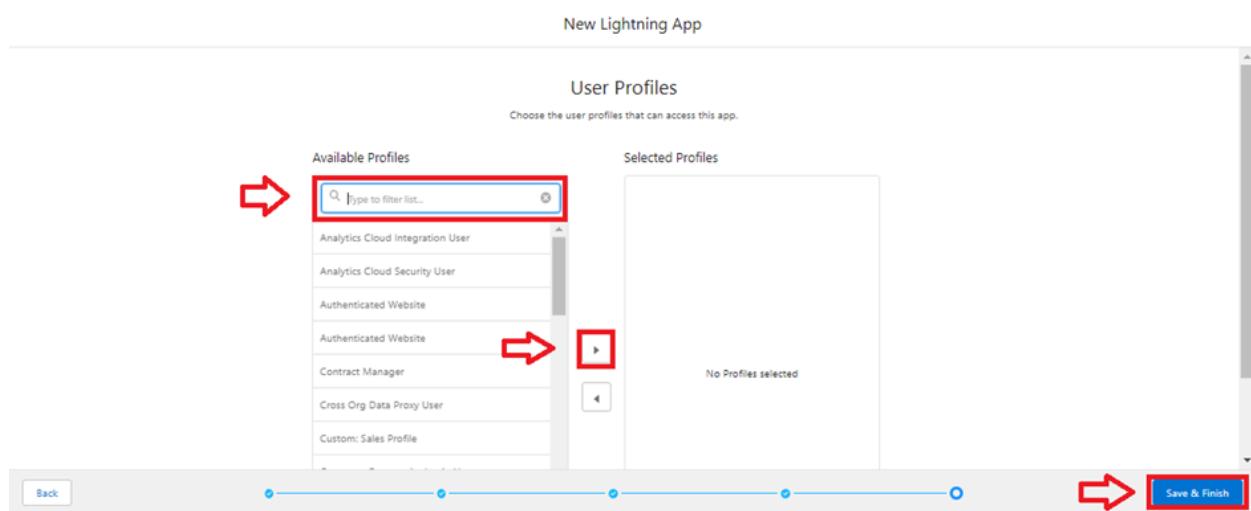
App Details	App Branding
App Name <input type="text" value="Name your app..."/>	Image <input type="button" value="Upload"/> Primary Color Hex Value <input type="text" value="#0070D2"/>
Developer Name <input type="text" value="Enter a developer name..."/>	Org Theme Options <input type="checkbox"/> Use the app's image and color instead of the org's custom theme
Description <input type="text" value="Enter a description..."/>	App Launcher Preview

Next

- To Add 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. To Add User Profiles:



6. Search profiles (System administrator) in the search bar --> click on the arrow button --> save & finish.

► **Task 5: Creating Profiles :**

- A profile is a group/collection of settings and permissions that define what a user can do in salesforce. A profile controls "Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges.

Creating a Profiles: Now create a Store Supervisor profile and set its object permissions.

Creating a Profiles:

Now create a Store Supervisor profile and set its object permissions.

- From Setup enter Profiles in the Quick Find box, and select Profiles.
- From the list of profiles, find Standard User.

- Click Clone.
- For Profile Name, enter Store Supervisor.
- Click Save.
- While still on the Store Supervisor profile page, then click Edit.
- Scroll down to Custom Object Permissions and give access for Create,Read,Edit,Delete,View all and modify all for Our Customers,Consultants,Retailers,Others.
- Scroll down to Custom App Settings and give access for Urban Color.

To create a new profile:

1. Go to setup --> type profiles in quick find box --> click on profiles --> clone the desired profile (standard user is preferable) --> enter profile name --> save.
2. While still on the profile page, then click Edit.

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. A search bar at the top left contains 'prof'. The main content area displays a profile named 'Store Supervisor' with the following details:

- Profile Detail:**
 - Name: Store Supervisor
 - User License: Salesforce
 - Description: (empty)
 - Custom Profile: checked
- Permissions:** A large grid of checkboxes for various standard and custom objects. For example, 'Community (standard__Community)' has checkboxes for 'Data Manager (standard__DataManager)', 'Digital Experiences (standard__SalesforceCMS)', and 'Lightning Usage App (standard__LightningInstrumentation)'. 'Marketing (standard__Marketing)' also has a checked checkbox. 'Urban Color (Urban_Color)' is listed under 'Service (standard__Service)' with its checkbox checked. 'WDC (standard__Work)' is listed under 'Subscription Management (standard__RevenueCloudConsole)' with its checkbox checked.
- Service Provider Access:** A section with checkboxes for 'Queue Management (standard__QueueManagement)', 'Rental Management (Rental_Management)', and 'Vehicle Management (Vehicle_Management)'.
- Tab Settings:** A section with 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.

The screenshot shows two main sections of the Salesforce Setup interface. The top section displays the 'Profiles' configuration page under 'Password Policies', where various password-related settings are defined. The bottom section shows the 'Clone Profile' screen, which is used to create a new profile by cloning an existing one. In this screen, the 'Existing Profile' dropdown is set to 'Standard Platform User', and the 'Profile Name' field contains 'Billing Operator'. A note at the top of this screen states: 'You must select an existing profile to clone from.'

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 .

The screenshot shows the Salesforce Setup interface. The left sidebar has 'roles' selected under 'Users'. The main area is titled 'SETUP Roles' and shows a 'Role Edit' form for a 'New Role'. The form fields are as follows:

Label	Store Head
Role Name	Store_Head
This role reports to	thesmartbridge.com
Role Name as displayed on reports	(empty)

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

Similarly create One Roles under Store Head as Billing Operator.

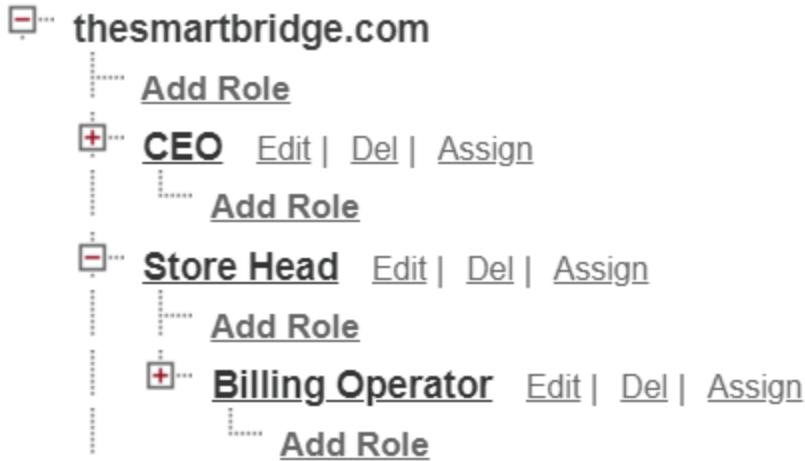
The screenshot shows the Salesforce Setup interface. The left sidebar has 'roles' selected under 'Users'. The main area is titled 'SETUP Roles' and shows a 'Role Edit' form for a 'New Role'. The form fields are as follows:

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

At the bottom are 'Save', 'Save & New', and 'Cancel' buttons. A 'Help for this Page' link is visible in the top right corner.

Your Organization's Role Hierarchy

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



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

► **Task 7 : Creation of an User :**

- In Salesforce, a user represents an individual who has access to the Salesforce platform and its functionalities. Each user is assigned a unique username, and their access level and permissions are defined by their profile and role within the organization. Users can perform tasks such as managing records, running reports, and collaborating with team members based on their assigned permissions. Salesforce administrators configure user settings, including login credentials, security settings, and access to various features and data, ensuring that users can efficiently and securely perform their job functions.
1. From Setup, in the Quick Find box, enter Users, and then select Users.
 2. Click New User.
 3. Enter the user's name Amar K and (Your) email address and a unique username in the form of an email address. By default, the username is the same as the email address.
 4. Select a Role(Store Head)
 5. Select a User Licence As Salesforce.
 6. Select a profile as Store Supervisor.
 7. Check Generate new password and notify the user immediately to have the user's

login name and a temporary password emailed to your email.

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

The image contains two screenshots of the Salesforce Setup interface, both titled "Users".

User Edit (Top Screenshot):

- General Information:** Fields include First Name (Amar), Last Name (k), Alias (ak), Email (mailid@gmail.com), Username (amar2133@salesforce.com), Nickname (User167161323313747430), Title (Store Supervisor), Company (), Department (), Division ().
- Role:** Store Head
- User License:** Salesforce
- Profile:** Store Supervisor
- Active:** Checked
- Marketing User:** Unchecked
- Offline User:** Unchecked
- Knowledge User:** Unchecked
- Flow User:** Unchecked
- Service Cloud User:** Unchecked
- Site.com Contributor User:** Unchecked
- Site.com Publisher User:** Unchecked
- WDC User:** Unchecked
- Data.com User Type:** -None--

Single Sign On Information (Bottom Screenshot):

- Federation ID:** (empty)
- Locale Settings:** Time Zone (GMT-07:00) Pacific Daylight Time (America/Los_Angeles), Locale (English (United States)), Language (English).
- Approver Settings:** Delegated Approver (empty), Manager (empty), Receive Approval Request Emails (Only if I am an approver), Generate new password and notify user immediately (unchecked).

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.

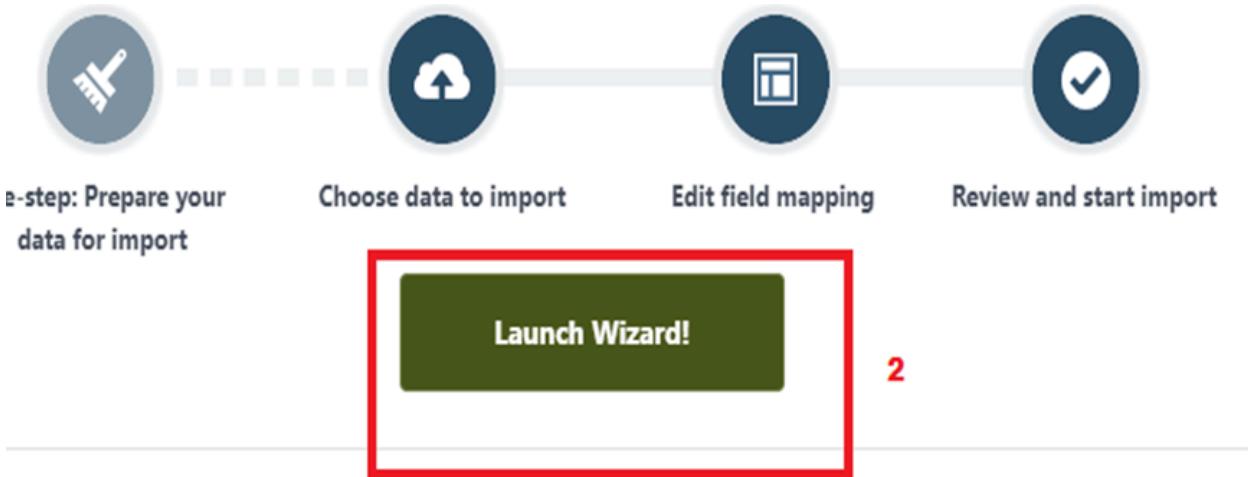
► Task 9: Importing Data :

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.

The screenshot shows the Salesforce Home page. At the top, there are navigation tabs: Setup, Home, and Object Manager. A search bar contains the text "data impo". Below the search bar, a sidebar titled "Integrations" has a red box around it, and a link "Data Import Wizard" with a red number "1" next to it. A message says "Didn't find what you're looking for? Try using Global Search." On the right, there's a "Create" button with a dropdown arrow. The main area is titled "SETUP Home" and features three decorative cards: one with a robot, one with a smartphone and tent, and one with a jungle scene.

3. Click Launch Wizard!



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

The screenshot shows the "Choose data" step of the Data Import Wizard. At the top, there's a "Let's do this" button. Below it, a list of objects includes "Drivers", "Fees", "others", "Consultants" (which is highlighted with a red box and has a red number "3" next to it), "Our Customers", and "Properties". To the right, there are buttons for "Edit mapping" and "Start import". At the bottom, there are "Cancel", "Previous", and "Next" buttons, with "Next" being green.

5. Select Add new records.

Import your Data into Salesforce

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

What kind of data are you importing?

Standard objects	Custom objects
Attendees	>
Buyers	>

What do you want to do?

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

Where is your data located?

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

Choose data

Edit mapping

Start import

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

Cancel Previous

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

Edit	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

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)	Async Processing Time (ms)	Records Processed	Records Failed
View Request	View Result	7512w00000Xqar	6/19/2023, 11:05 PM	6/19/2023, 11:05 PM	103	52	0	9	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

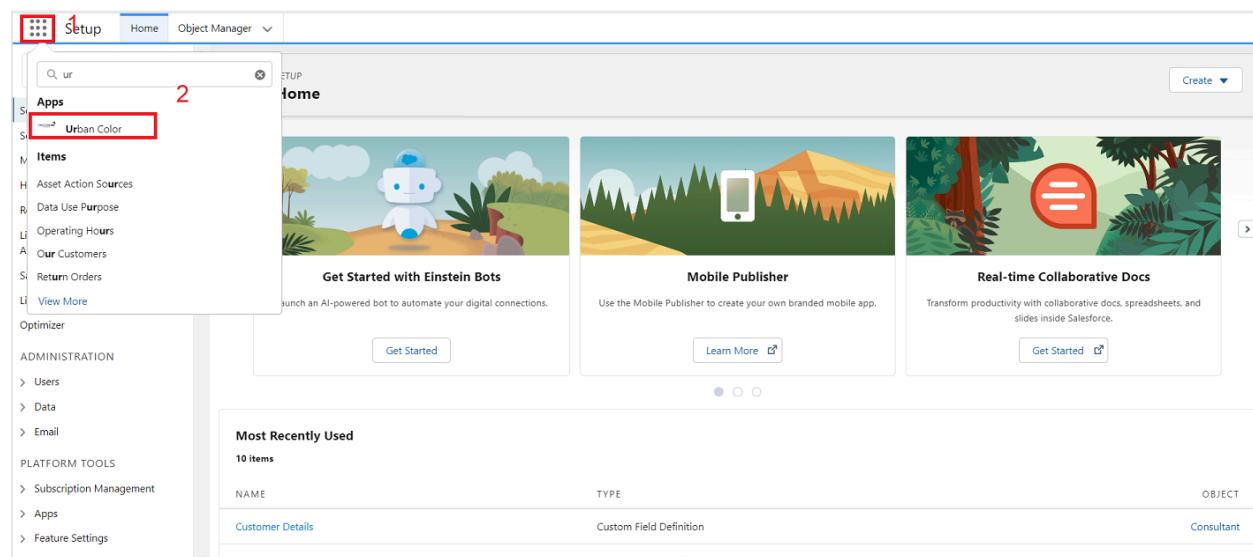
9.Click on Add Bucket and name it as NetBanking

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.



REPORT ▾ New Consultants Report **Consultants**

Fields > **Outline** Filters

Groups GROUP ROWS Add group...

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

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

Update Preview Automatically

REPORT ▾ New Consultants Report **Consultants**

Fields > **Outline** Filters

Groups GROUP ROWS Add group...

Columns Add column... Consultant: Consultant Name Delivery Type Products Payment 1

	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

Update Preview Automatically

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 * Bucket Name

All Values (4)	Search Values	
Unbucketed Values (4)	<input type="checkbox"/> VALUE	BUCKET
	<input type="checkbox"/> Credit Card	
	<input type="checkbox"/> Debit Card	
	<input type="checkbox"/> Upi	
	<input type="checkbox"/> Cash	

Bucket remaining values as Other

[Add Bucket](#) [Move To ▾](#)

[Cancel](#) [Apply](#)

Edit Bucket Column

* Field X * Bucket Name

All Values (4)	Search Values
<input type="text" value="Bucket Name"/> 2	
Unbucketed Values (4)	
	<input type="checkbox"/> VALUE BUCKET <input type="checkbox"/> Credit Card <input type="checkbox"/> Debit Card <input type="checkbox"/> Upi <input type="checkbox"/> Cash

1 Bucket remaining values as Other

Add Bucket

Edit Bucket Column

* Field * Bucket Name

All Values (4)	Search Values
<input type="checkbox"/> Net Banking (0)	<input type="checkbox"/> VALUE BUCKET
<input type="checkbox"/> Cash (0)	<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

All Values (4)	Search Values
<input type="checkbox"/> Net Banking (0)	<input type="checkbox"/> VALUE BUCKET
<input type="checkbox"/> Cash (0)	<input checked="" type="checkbox"/> Credit Card
	<input checked="" type="checkbox"/> Debit Card
	<input checked="" 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)

Net Banking (3)		
Cash (0)		
Unbucketed Values (1)		
<input checked="" type="checkbox"/> Bucket remaining values as Other		

Search Values

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

Add Bucket Move To ▾

Cancel Apply

Edit Bucket Column

* Field * Bucket Name

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

All Values (4)

Net Banking (3)		
Cash (1)		
Unbucketed Values (0)		
<input type="checkbox"/> Bucket remaining values as Other		

Search Values

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

Add Bucket Move To ▾

Cancel Apply

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

Groups

GROUP ROWS

Add group...

Columns

Add column...

Consultant: Consultant Name X

Delivery Type X

Products X

Payment X

Payment type X

	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

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

Payment type ↑ ↓

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

Save Report

1 ***Report Name**
Consultants Report

Report Unique Name **Consultants_Report_hvb**

Report Description

2 **Folder**
Private Reports

3 **Save**

View Reports :

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

The screenshot shows the Salesforce Setup Home page. A red box labeled '1' highlights the 'Setup' icon in the top left corner. A red box labeled '2' highlights the 'Urban Color' application in the sidebar under the 'Apps' section.

Urban Color Application Overview:

- Get Started with Einstein Bots:** An AI-powered bot to automate digital connections. Includes a 'Get Started' button.
- Mobile Publisher:** Use the Mobile Publisher to create your own branded mobile app. Includes a 'Learn More' button.
- Real-time Collaborative Docs:** Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce. Includes a 'Get Started' button.

Most Recently Used Reports:

NAME	TYPE	OBJECT
Customer Details	Custom Field Definition	Consultant

Recent Reports List:

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	4 Consultants Report	Private Reports	Hazari Ajay Kumar			
Created by Me	Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	12/17/2022, 7:50 PM	
Public Reports	Opportunities Details		Private Reports	Hazari Ajay Kumar	4/12/2023, 11:46 PM	
All Reports	Rental New 1		Public Reports	Hazari Ajay Kumar	2/2/2023, 10:39 PM	

A red box labeled '3' highlights the 'Reports' tab in the navigation bar. A red box labeled '4' highlights the 'Consultants Report' entry in the recent reports list.

Task 11 : Working with dashboards :

Create Dashboard :

1. Click on the Dashboards tab from the Urban Color application.
2. Click on the new dashboard.
3. Give name- Consultant Dashboard
4. Click create
5. Give your dashboard a name and click on +component
6. Select the Consultants Report which you created.
7. For the data visualization select any of the chart, table etc. as per your choice/requirement.
8. Click add.
9. Click save.

New Dashboard

* Name

3

Consultant Dashboard

Description

Folder

Private Dashboards

Select Folder

4

Cancel

Create

Select Report

Reports

Recent

Created by Me

Private Reports

Public Reports

All Reports

Folders

Created by Me

Shared with Me

All Folders

Select Report

Q. Search Reports and Folders...

Reports and Folders ▾

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, 2023, 10:43 PM - Public Reports

Cancel

Select

7

Add Component

Report

Consultants Report X

Use chart settings from report i

Display As 7

Y-Axis

Payment type

X-Axis

Record Count

Preview

Consultants Report

Record Count

0 2 4 6 8

Net Banking 7

Cash 2

View Report (Consultants Report)

Urban Color Our Customers Consultants Retailers others Reports Dashboards

Consultant Dashboard

+ Component + Filter Cancel Add Save Done 8 9

Consultants Report

Record Count

0 2 4 6 8

Net Banking 7

Cash 2

View Report (Consultants Report)

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

1

Setup Home Object Manager ▾

Apps 2

Urban Color

Items

H Asset Action Sources

R Data Use Purpose

L Operating Hours

A Our Customers

S Return Orders

Li View More

Optimizer

ADMINISTRATION

> Users

> Data

> Email

PLATFORM TOOLS

> Subscription Management

> Apps

> Feature Settings

SETUP Home

Get Started with Einstein Bots

Mobile Publisher

Real-time Collaborative Docs

Get Started Learn More Get Started

Most Recently Used

10 items

NAME TYPE OBJECT

Customer Details Custom Field Definition Consultant

3

Urban Color Our Customers Consultants Retailers others Reports Dashboards

4

Search recent dashboards... New Dashboard New Folder

Dashboards

Recent 3 items

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	
All Dashboards						
FOLDERS						