

Cosmetic Store Management

Description :

Cosmetics Store Management in Salesforce is a solution that helps cosmetic stores manage their operations efficiently and effectively. The solution is built on the Salesforce platform, which provides a powerful and scalable platform for managing customer relationships, sales, and inventory. cosmetics stores improve their operational efficiency, enhance customer engagement, and drive growth.

Summary :

1. Key Features:Customer Management:

- **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 Catalogue: Maintain an up-to-date catalogue 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 analyse 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 Colour,For this Urban Colour, we need to create 3 objects i.e .,Our Customers,Consultants,Retailers,others.

The below steps will assist you in creating those objects.

1. Click on the gear icon and then selectSetup.
2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a CreateDropdown click on that and select Custom Object.
4. Creation of Our CustomerObject

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

1. Label: Our Customer
2. Plural Label: Our Customers
3. Record Name: Our Customer
4. Check the Allow Reports check box
5. Check the Allow Search checkbox
6. ClickSave.
7. Now create a custom tab. Click the Home tab, enter Tabs in QuickFind and select Tabs.
8. UnderCustom Object Tabs, click New.
9. ForObject, select Our Customer.
10. ForTab Style, select any icon.

11. Leave all defaults as is. ClickNext, Next, and Save.

The image consists of two screenshots of the Salesforce Setup interface. The top screenshot shows the main Setup menu with the 'Setup' icon highlighted by a red box and an arrow pointing to it. The bottom screenshot shows the 'Object Manager' page, with the 'Create' button highlighted by a red box and an arrow pointing to it. A large black arrow points from the top screenshot down to the bottom one.

We need to create 4 objects named Our customer, Consultant, Retailer, Others.
For creating the other 3 objects, we need to follow the same procedure

as mentioned above. After the completion of the object creation task,

We'll move on to further steps.

Task2 : Creating Fields and Relationship :

1. An object relationship in Salesforce is a two-way association 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 Retailersobjects

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

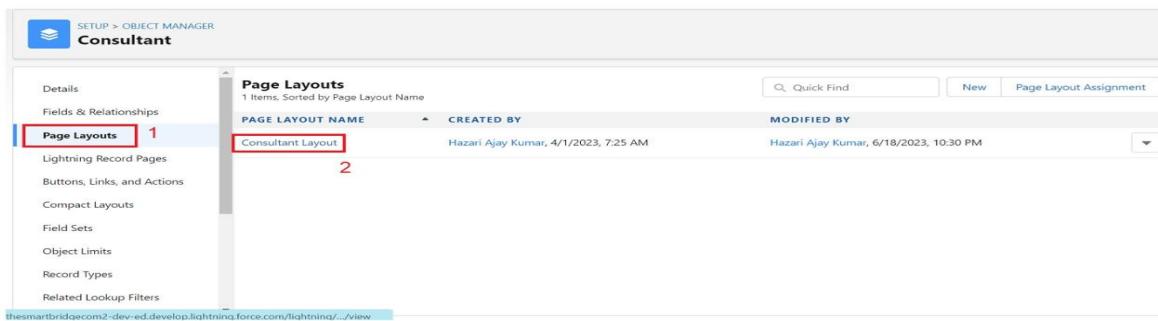
Fields in Other objects follow below data types:

| 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 |

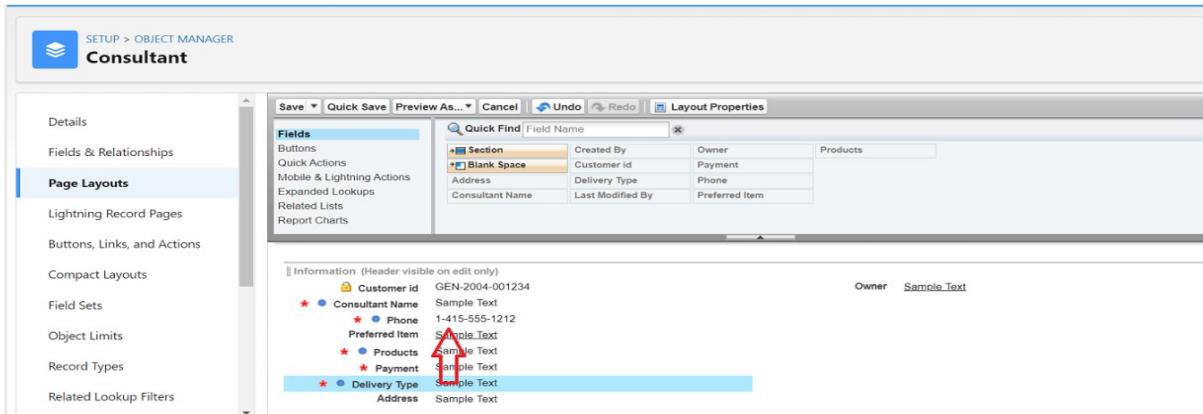
In the CosmeticStore Management System built on Salesforce, fields and relationships are designed to streamline operations and enhance data management. Key fields include customer details (e.g., contact information and purchase history), product specifics (e.g., SKU, price, and inventory levels), order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

Task 3: Page Layout creation:

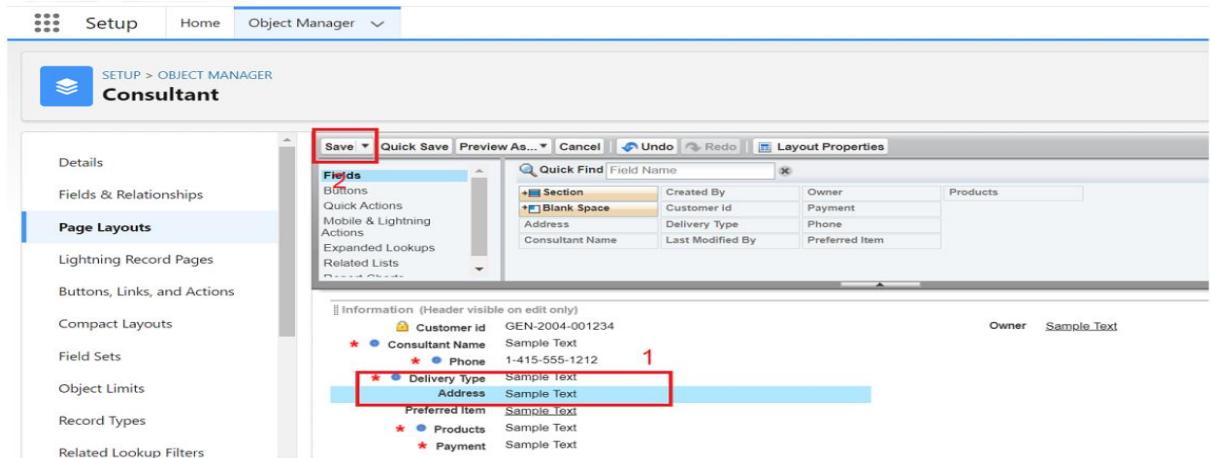
1. From the Salesforce setup menu, go to "Object Manager" and select the Consultants object.
2. Click on "Page Layouts" in the left sidebar. This will display a list of available page layouts for the selected object.
3. Select the Consultant Layout page layout.



4. Click And Drag Deliverytype and AddressFields Below Phone field.



5. Click on Save



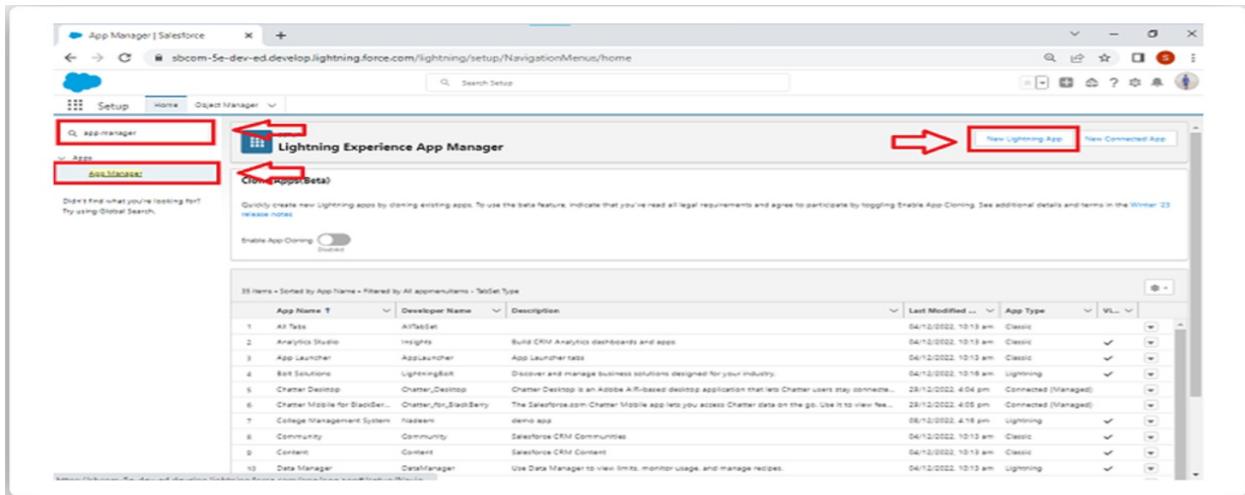
Creating a page layout in Salesforce involves navigating to the object manager, selecting the relevant object, and either creating a new layout or editing an existing one. You can design the layout by dragging and dropping fields, adding sections and related lists, and including buttons or links as needed. Customize field properties and section settings to suit user needs, then save and assign the layout to specific profiles or record types. Finally, preview and test the layout to ensure it is functional and meets user requirements.

Task 4 : Creation of a Lightning App :

An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar

To create a lightning app page:

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

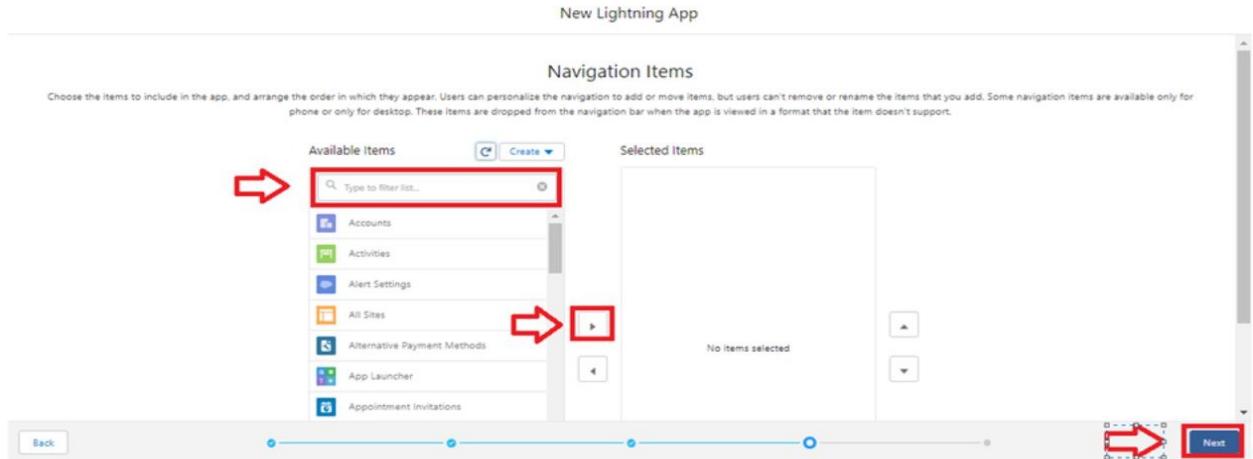


- Fill the app name as Urban Colour in app details and branding -->Next --> (App option page) keep it as default--> Next -

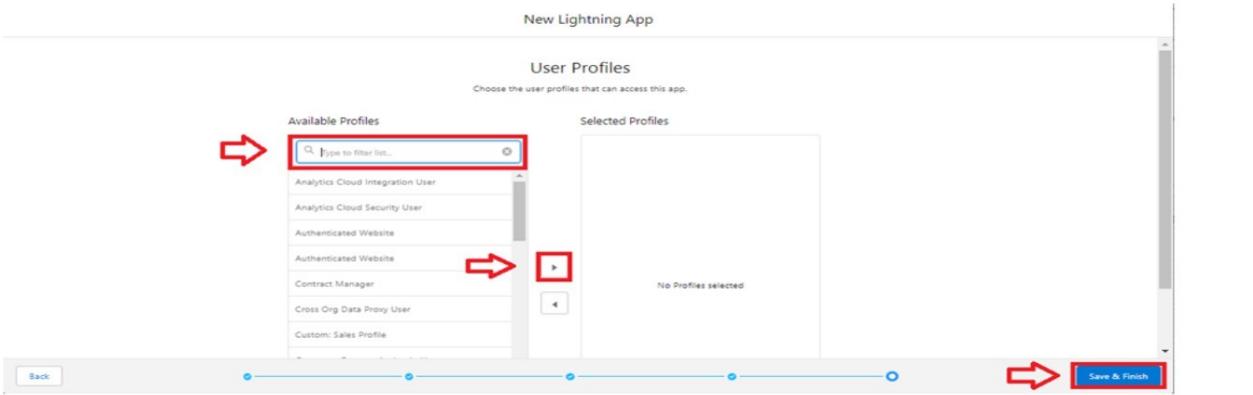
The screenshot shows the 'New Lightning App' configuration page. At the top, it says 'New Lightning App'. Below that, there's a section titled 'App Details & Branding' with the sub-instruction 'Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.' The 'App Details' section contains fields for 'App Name' (with a red arrow pointing to the input field), 'Developer Name', and 'Description'. The 'App Branding' section contains fields for 'Image' (with a red arrow pointing to the upload button), 'Primary Color Hex Value' (set to #007002), and 'Org Theme Options' (unchecked). At the bottom, there's a 'Next' button highlighted with a red arrow.

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

- ToAdd Navigation Items:



4. Select the items (Our Customers, Consultants, Retailers, Others, Reports, Dashboards) from the search bar and move it using the arrow button --> Next.
5. 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. 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, Visual force page access, Page layouts, Record Types, Login hours & Login IP ranges.

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

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

- b. From Setup enter Profiles in the Quick Find box, and select Profiles.
- c. From the list of profiles, find Standard User.
- d. Click Clone.
- e. For Profile Name, enter Store Supervisor.
- f. Click Save.

- g. While still on the Store Supervisor profile page, then click Edit.
 - h. 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.
 - i. Scroll down to Custom App Settings and give access for Urban Colour. 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 Profiles page. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar on the left shows 'Q, profi'. Below it, a sidebar lists 'Users' and 'Profiles', with 'Profiles' currently selected. The main content area is titled 'SETUP Profiles' and shows the 'Store Supervisor' profile. It includes a brief description: 'Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing the profile or by changing the record types assigned to the user.' Below this, a table lists permissions:

| | | | |
|--------------------|--|--|---|
| Log in & Pages (1) | Enabled Apex Class Access (100) | Enabled Visualforce Page Access (10) | Enabled External Data Source Access (0) |
| | Enabled External Product Record Access (0) | Enabled Custom Metadata Type Access (0) | Enabled Custom Setting Definitions Access (0) |
| | | Enabled Service Presence Status Access (0) | Enabled Custom Permissions (0) |

 The 'Profile Detail' section shows the profile name 'Store Supervisor', user license 'Salesforce', and a checked 'Custom Profile' checkbox. There are 'Edit', 'Clone', 'Delete', and 'View Users' buttons.

The screenshot shows the 'Profile Detail' section of the Salesforce Setup Profiles page for the 'Store Supervisor' profile. It displays a grid of permissions categorized into 'Standard' and 'Custom' sections.

| Category | Item | Setting |
|----------|---|-------------------------------------|
| Standard | Community (standard_Community) | <input checked="" type="checkbox"/> |
| | Content (standard_Content) | <input checked="" type="checkbox"/> |
| | Data Manager (standard_DataManager) | <input checked="" type="checkbox"/> |
| | Digital Experiences (standard_DigitalExperiences) | <input checked="" type="checkbox"/> |
| | Lightning App Usage (standard_LightningNotification) | <input checked="" type="checkbox"/> |
| | LWC Learning (LWC_Learning) | <input type="checkbox"/> |
| | Marketing (standard_Marketing) | <input checked="" type="checkbox"/> |
| | Queue Management (standard_QueueManagement) | <input checked="" type="checkbox"/> |
| | Rental Management (Rental_Management) | <input type="checkbox"/> |
| | Service Provider Access | <input type="checkbox"/> |
| Custom | Standard_Chat (standard_Chat) | <input type="checkbox"/> |
| | Salesforce Scheduler Setup (standard_LightningSchedulerSetup) | <input type="checkbox"/> |
| | Sample Console (standard_ServiceConsole) | <input type="checkbox"/> |
| | Services (standard_Service) | <input checked="" type="checkbox"/> |
| | Service Console (standard_LightningServiceConsole) | <input checked="" type="checkbox"/> |
| | Sites (standard_Sites) | <input checked="" type="checkbox"/> |
| | Subscription Management (standard_RevenueCloudConsole) | <input checked="" type="checkbox"/> |
| | Urban Color (Urban_Color) | <input type="checkbox"/> |
| | Vehicle Management (Vehicle_Management) | <input type="checkbox"/> |
| | WDC (standard_WDC) | <input checked="" type="checkbox"/> |

 At the bottom, there is a note: '(0) items have been modified since last modification.' and a 'Tab Settings' section.

3. Scroll down to the Custom object permission and give all access to the Consultants, Others, Our Customers, Retailers object.
4. Click on Save.
5. Similarly Create operator profile, Clone Salesforce Platform user and give access only for Billing Operator.

Task 6: Setting up Roles :

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

Salesforce.

- >Clickon the Gear Icon
- >Click"Setup"
- >In the Quick Find box, enter "Roles"
- >Click"Roles"
- >Click on "Set Up Roles"
 - >Click "Expand All"
- >Under the CEO, click on "AddRole"
- >Fill up the Label as Store Head, Role Name Store_Head.
- >Enter a Role name that will be displayed on Reports.

The first screenshot shows the 'Role Edit' page for creating a new role. The 'Label' field is set to 'Store Head' and the 'Role Name' field is set to 'Store_Head'. The second screenshot shows the same page after saving, with the 'Role Name' field now showing 'Billing Operator'. The third screenshot shows the 'Your Organization's Role Hierarchy' page, displaying a tree structure with three roles: 'thesmarbridge.com' (parent), 'CEO' (child), 'Store Head' (child), and 'Billing Operator' (child of 'Store Head').

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 top screenshot shows the 'User Edit' page under the 'General Information' tab. The user's first name is Amar, last name is K, email is mailid@gmail.com, and the role is Store Head. The bottom screenshot shows the 'Single Sign On Information' page, which includes locale settings (Time Zone: Pacific Daylight Time (America/Los_Angeles), Locale: English (United States), Language: English) and approver settings (Delegated Approver and Manager fields, and a dropdown for 'Receive Approval Request Emails' set to 'Only if I am an approver').

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:

Navigate to the ObjectTab:

>Log in to Salesforce and go to the relevant object tab (e.g., Accounts, Contacts, Opportunities).

>Click "New":

>On the object's home

page or list view, click the "New" button to initiate the creation of a new record.

>Enter RecordInformation:

>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.

>Save the Record:

>Once all necessary information is entered, click

"Save" to create and store the new record in Salesforce.

Steps to Modify Record:

Find the Record:

>Locate the record you want to modify by using the object's list view, search function, or related lists.

>Open the Record:

>Click on the record's name to open it and view its details.

>Click "Edit":

In the record's detail view, click the "Edit" button to enable editing mode.

Update RecordInformation:

Make the necessary changes to the fields as required. Ensure all required fields are correctly filled out.

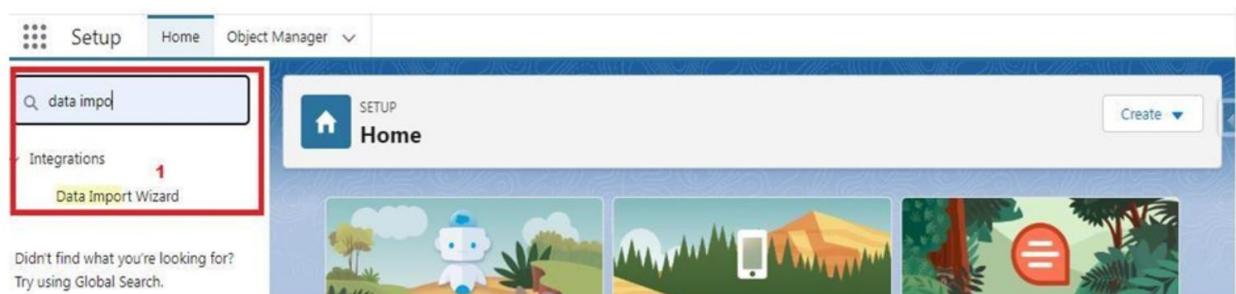
Save the Changes: After making the updates, click "Save" to apply and store the modifications.

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

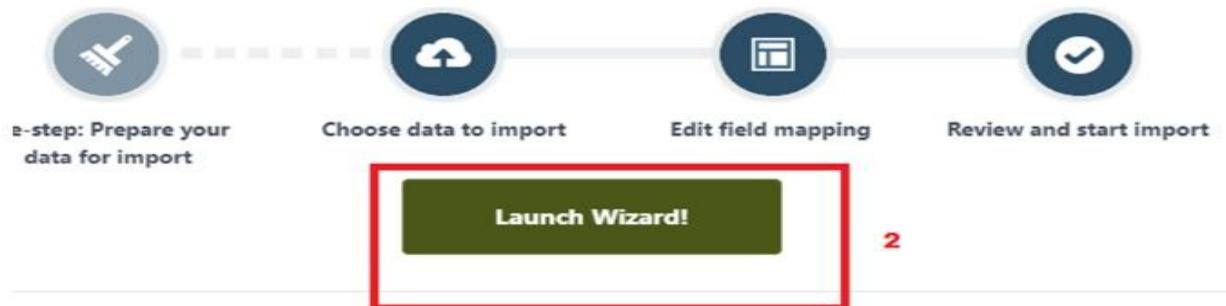
► Task 9: Importing Data :

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

Choose data

What kind of data are you importing? Standard objects Custom objects

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 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.

| Edit | Mapped Salesforce Object | CSV Header | Example | Example | Example |
|--------|--------------------------|-----------------|-----------------|-------------------|-------------|
| Change | Consultant Name | Consultant Name | Dev Raj | Ajith | Babu |
| Change | Mobile Number | Mobile Number | 984036732 | 784653673 | 902659408 |
| 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 | ajithc4@gmail.com | |

Cancel Previous Next

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

Review & Start Import

Your selections:

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

Your import will include:

7 Mapped fields

Your import will not include:

0 Unmapped fields

Cancel Previous Start import

9. Click OK on the popup.
 10. Scroll down the page and verify that your data has been imported under batches.
 11. 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
- >Select UrbanColor App
- >Click the reports tab
- >Click New Report.
- >Click the report type as Consultants Click Start report.
- >Customize your report; in Columns select- ConsultantName,Delivery type,Products,Payment.
- >Click on the drop down option on the payment column and selectBucket this column.
- >Bucket Name as Payment type
 - >Click on Add Bucket and name it as NetBanking
 - >Click on Add Bucket and name it as Cash
 - >Now Click on All Values and select Credit card,Debit card,UPI, and Move to Net Banking.
 - >Now Click on All Values again and selectCash and Move to Cash.

The screenshot shows the Salesforce Home page. The sidebar on the left is titled 'Urban Color' (highlighted with a red box and number 2). The main content area features three cards: 'Get Started with Einstein Bots', 'Mobile Publisher', and 'Real-time Collaborative Docs'. Below these cards is a section titled 'Most Recently Used' with a table showing 'Customer Details' and 'Custom Field Definition'.

The screenshot shows the 'Reports' section within the 'Urban Color' app. The top navigation bar includes 'Reports' (highlighted with a red box and number 1), 'Recent', and '2 items'. Below this is a table with columns: 'REPORTS', 'Report Name', 'Description', 'Period', 'Created By', 'Created On', and 'NoOfRowsUsed' (highlighted with a red box and number 2).

Click on Apply

This screenshot shows a report titled "New Consultants Report" with a table titled "Consultants". The table has columns: Consultant, Consultant Name, Delivery Type, Products, and Payment. The rows list various consultants with their details. A red box highlights the "Payment" column header.

| Consultant | Consultant Name | Delivery Type | Products | Payment |
|------------|-----------------|---------------|-------------|-------------|
| Dev Raj | | Self Pickup | Lipstick | Cash |
| Ayith | | Counter | Compact | UPI |
| Bethu | | Self Pickup | Face Pack | Credit Card |
| Chitra | | Counter | Eye Liner | Debit Card |
| Sowethi | | Counter | Nail Polish | UPI |
| Praasad | | Self Pickup | Eye Liner | UPI |
| Ajay Kumar | | Counter | Lip Balm | Debit Card |
| Shankar | | Self Pickup | Face Pack | Cash |
| Sandeep | | Counter | Eye Liner | UPI |

This screenshot shows the same report interface. A context menu is open over the "Payment" column header. The menu items include "Sort Ascending", "Sort Descending", "Group Rows by This Field", "Group Columns by This Field", "Bucket This Column" (which is highlighted with a red box), and "Show Unique Count". A red number "1" is next to the "Sort Ascending" item, and a red number "2" is next to the "Bucket This Column" item.

This screenshot shows the "Edit Bucket Column" dialog box. The "Field" dropdown is set to "Payment" and the "Bucket Name" input field is set to "Payment type". The "All Values (4)" section lists "Unbucketed Values (4)". The "Search Values" section contains a table with columns "VALUE" and "BUCKET". It lists five values: Credit Card, Debit Card, UPI, Cash, and a placeholder row for "Bucket remaining values as Other". The "Add Bucket" and "Move To" buttons are at the bottom, along with "Cancel" and "Apply" buttons.

| SEARCH VALUES | |
|---------------|--------|
| Value | Bucket |
| Credit Card | |
| Debit Card | |
| UPI | |
| Cash | |

Edit Bucket Column

| | |
|---|---------------------------------------|
| * Field Payment | * Bucket Name Payment type |
| All Values (4) | Search Values |
| <input type="text" value="Bucket Name"/> 2 | <input type="checkbox"/> VALUE |
| | <input type="checkbox"/> Credit Card |
| | <input type="checkbox"/> Debit Card |
| | <input type="checkbox"/> Upi |
| | <input type="checkbox"/> Cash |
| Unbucketed Values (4) | BUCKET |
| <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) | Search Values |
| <input type="checkbox"/> Net Banking (0) <input type="button" value="Edit"/> <input type="button" value="Delete"/> 1 | <input type="checkbox"/> VALUE |
| <input type="checkbox"/> Cash (0) <input type="button" value="Edit"/> <input type="button" value="Delete"/> | <input type="checkbox"/> Credit Card |
| Unbucketed Values (4) | <input type="checkbox"/> Debit Card |
| <input type="checkbox"/> Bucket remaining values as Other | <input type="checkbox"/> Upi |
| Add Bucket | <input type="checkbox"/> Cash |
| Move To ▾ | |
| Cancel Apply | |

Edit Bucket Column

| | |
|--|---|
| * Field Payment | * Bucket Name Payment type |
| All Values (4) | Search Values |
| <input type="checkbox"/> Net Banking (0) <input type="button" value="Edit"/> <input type="button" value="Delete"/> | <input type="checkbox"/> VALUE |
| <input type="checkbox"/> Cash (0) <input type="button" value="Edit"/> <input type="button" value="Delete"/> | <input checked="" type="checkbox"/> Credit Card |
| Unbucketed Values (4) | <input checked="" type="checkbox"/> Debit Card |
| <input type="checkbox"/> Bucket remaining values as Other | <input checked="" type="checkbox"/> Upi |
| Add Bucket | <input type="checkbox"/> Cash |
| Move To ▾ | |
| Cancel Apply | |

Edit Bucket Column

| * Field | X | * Bucket Name | | | | | | | | | | | | | | | | | | | | | | | | |
|--|--|---|-----------------|--|--|----------|--|--|-----------------------|--|--|------------|--|--|-------|--------|---|--|--|--|--------------------|--|------|--|-------------------|--|
| Payment | | Payment type | | | | | | | | | | | | | | | | | | | | | | | | |
| <div style="display: flex; justify-content: space-between;"> <div style="flex: 1;"> All Values (4) <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 30%;">Net Banking (0)</td><td style="width: 10%; text-align: center;"></td><td style="width: 10%; text-align: center;"></td></tr> <tr><td>Cash (0)</td><td style="text-align: center;"></td><td style="text-align: center;"></td></tr> <tr><td colspan="3">Unbucketed Values (4)</td></tr> <tr><td colspan="3">New Bucket</td></tr> </table> <input type="checkbox"/> Bucket remaining values as Other </div> <div style="flex: 1; border: 1px solid #ccc; padding: 5px; margin-left: 10px;"> Search Values <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 30%;">VALUE</th> <th style="width: 70%;">BUCKET</th> </tr> </thead> <tbody> <tr><td><input checked="" type="checkbox"/> Credit Card</td><td></td></tr> <tr><td><input checked="" type="checkbox"/> Debit Card</td><td></td></tr> <tr><td colspan="2">Net Banking</td></tr> <tr><td colspan="2">Cash</td></tr> <tr><td colspan="2">Unbucketed Values</td></tr> </tbody> </table> </div> </div> | | | Net Banking (0) | | | Cash (0) | | | Unbucketed Values (4) | | | New Bucket | | | VALUE | BUCKET | <input checked="" type="checkbox"/> Credit Card | | <input checked="" type="checkbox"/> Debit Card | | Net Banking | | Cash | | Unbucketed Values | |
| Net Banking (0) | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Cash (0) | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Unbucketed Values (4) | | | | | | | | | | | | | | | | | | | | | | | | | | |
| New Bucket | | | | | | | | | | | | | | | | | | | | | | | | | | |
| VALUE | BUCKET | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input checked="" type="checkbox"/> Credit Card | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input checked="" type="checkbox"/> Debit Card | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Net Banking | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Cash | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Unbucketed Values | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="button" value="Add Bucket"/> | <input type="button" value="Move To"/> | <input type="button" value="Cancel"/> <input style="background-color: #0070C0; color: white; font-weight: bold; border-radius: 5px; border: none; padding: 2px 10px;" type="button" value="Apply"/> | | | | | | | | | | | | | | | | | | | | | | | | |

Edit Bucket Column

| * Field | X | * Bucket Name | | | | | | | | | | | | | | | | | | | | | | |
|---|--|---|-----------------|--|--|----------|--|--|-----------------------|--|--|------------|--|--|-------|--------|--------------------------------------|-------------|-------------------------------------|-------------|------------------------------|-------------|-------------|--|
| Payment | | Payment type | | | | | | | | | | | | | | | | | | | | | | |
| <div style="display: flex; justify-content: space-between;"> <div style="flex: 1;"> All Values (4) <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 30%;">Net Banking (3)</td><td style="width: 10%; text-align: center;"></td><td style="width: 10%; text-align: center;"></td></tr> <tr><td>Cash (0)</td><td style="text-align: center;"></td><td style="text-align: center;"></td></tr> <tr><td colspan="3">Unbucketed Values (1)</td></tr> <tr><td colspan="3">New Bucket</td></tr> </table> <input type="checkbox"/> Bucket remaining values as Other </div> <div style="flex: 1; border: 1px solid #ccc; padding: 5px; margin-left: 10px;"> Search Values <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 30%;">VALUE</th> <th style="width: 70%;">BUCKET</th> </tr> </thead> <tbody> <tr><td><input type="checkbox"/> Credit Card</td><td>Net Banking</td></tr> <tr><td><input type="checkbox"/> Debit Card</td><td>Net Banking</td></tr> <tr><td><input type="checkbox"/> Upi</td><td>Net Banking</td></tr> <tr><td colspan="2">Cash</td></tr> </tbody> </table> </div> </div> | | | Net Banking (3) | | | Cash (0) | | | Unbucketed Values (1) | | | New Bucket | | | VALUE | BUCKET | <input type="checkbox"/> Credit Card | Net Banking | <input type="checkbox"/> Debit Card | Net Banking | <input type="checkbox"/> Upi | Net Banking | Cash | |
| Net Banking (3) | | | | | | | | | | | | | | | | | | | | | | | | |
| Cash (0) | | | | | | | | | | | | | | | | | | | | | | | | |
| Unbucketed Values (1) | | | | | | | | | | | | | | | | | | | | | | | | |
| New Bucket | | | | | | | | | | | | | | | | | | | | | | | | |
| VALUE | BUCKET | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> Credit Card | Net Banking | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> Debit Card | Net Banking | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> Upi | Net Banking | | | | | | | | | | | | | | | | | | | | | | | |
| Cash | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="button" value="Add Bucket"/> | <input type="button" value="Move To"/> | <input type="button" value="Cancel"/> <input style="background-color: #0070C0; color: white; font-weight: bold; border-radius: 5px; border: none; padding: 2px 10px;" type="button" value="Apply"/> | | | | | | | | | | | | | | | | | | | | | | |

>In Group Rows, Add Payment Type Bucket Field.

>Click refresh

>Click Save and Run

>Give report name – Consultant report

>Click Save

The screenshot shows a report configuration interface with two main sections: 'Fields' on the left and a preview table on the right.

Fields Section:

- Groups:**
 - GROUP ROWS:** Contains 'Add group...' and 'Payment type' (highlighted with a red box).
 - GROUP COLUMNS:** Contains 'Add group...'.
- Columns:** Contains 'Add column...', 'Consultant: Consultant Name', 'Delivery Type', 'Products', and 'Payment'.

Preview Table:

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

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

Save Report

1. Report Name: (highlighted with a red box)

Report Unique Name: (highlighted with a red box)

Report Description:

2. Folder: (highlighted with a red box)

Select Folder:

3. Save: (highlighted with a red box)

View Reports:

- > Click on App Launcher on the left side of the screen.
- > Search Urban Colour App & click on it.
- > Click on the Reports Tab.
- > Click on Urban Colour Report and see records.

Step 2: Click on the **Urban Color** app icon in the sidebar.

Step 3: Click on the **Reports** tab in the top navigation bar.

Step 4: Click on the **Consultants Report** in the Recent section of the Reports page.

► Task 11 : Working with dashboards :

Create Dashboard :

1. Click on the Dashboards tab from the Urban Colour application.
2. Click on the new dashboard.
3. Givename- 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

1. Dashboards

2. Recent

3. Name: Consultant Dashboard

4. Folder: Private Dashboards

5. Create

6. Select Report

7. Reports

8. Recent

9. Consultants Report

10. Select

Add Component

Report: Consultants Report

11. Use chart settings from report

12. Display As: Bar Chart (highlighted with a red box)

13. Payment type: Net Banking

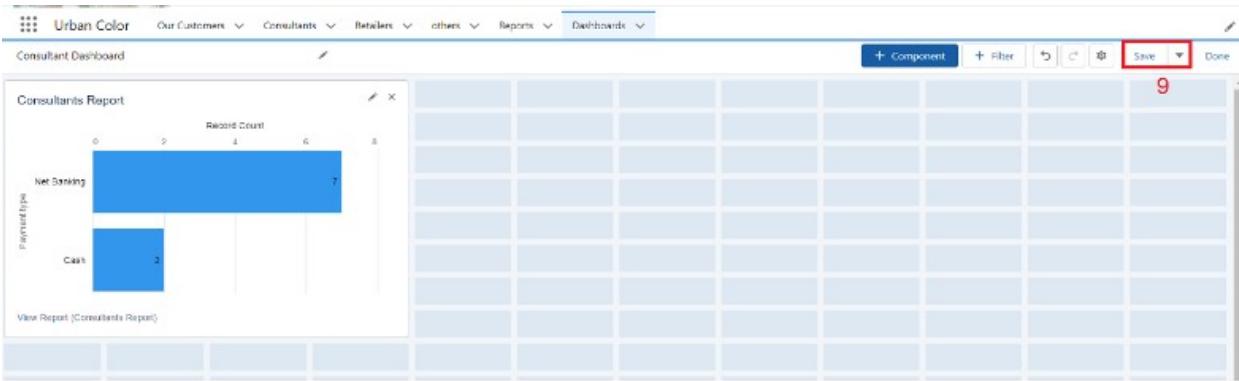
14. X-Axis: Record Count

15. Preview: Consultants Report

16. View Report (Consultants Report)

17. Add

| Payment type | Record Count |
|--------------|--------------|
| Net Banking | 7 |
| Cash | 2 |



View Dashboard :

- >Click on App Launcher on the left side of the screen.
- >Search Candidate Internal ResultCard & click on it.
- >Click on Dashboard Tab.
- >Click on Candidate InternalResult Card see graph view of records

A screenshot of the Salesforce App Launcher. On the left, there's a sidebar with various categories: Apps (selected), Items, Asset Action Sources, Data Governance, Operating Hours, Our Customers, HubSpot Connect, Home Menu, Options, Administration (User, Data, Email), and Platform Tools (Subscription Management, App, Feature Settings). The 'Setup' tab is highlighted with a red box. The main area shows three cards: 'Get Started with Einstein Bots', 'Mobile Publisher', and 'Real-time Collaborative Docs'. Below these cards is a section titled 'Most Recently Used' with three items: 'Customer Details', 'Custom Field Definition', and 'Contact'. The status bar at the bottom right shows the number '2'.

A screenshot of the Salesforce Dashboards page. The top navigation bar includes 'Our Customers', 'Consultants', 'Retailers', 'others', 'Reports', and 'Dashboards'. The 'Dashboards' tab is highlighted with a red box. The main area shows a table of dashboards under the 'Recent' tab. The table columns are: Dashboard Name, Description, Folder, Created By, Created On, and Subscribed. There are three rows in the table:

| Dashboard Name | Description | Folder | Created By | Created On | Subscribed |
|-----------------------|-------------|--------------------|------------------|---------------------|------------|
| Consultant Dashboard | | Private Dashboards | Hazel Ajay Kumar | 6/20/2023, 10:46 PM | |
| Opportunities Details | | Private Dashboards | Hazel Ajay Kumar | 4/12/2023, 11:57 PM | |
| Opportunity details | | Private Dashboards | Hazel Ajay Kumar | 4/12/2023, 11:48 PM | |

The status bar at the bottom right shows the number '3'.

