

Cosmetics Store Management

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Abstract

Cosmetics Store Management in Salesforce is a comprehensive solution designed to empower cosmetics stores to manage their operations with unparalleled efficiency and effectiveness. Built on the robust Salesforce platform, this innovative solution provides a powerful and scalable foundation for streamlining customer relationships, sales, and inventory management.

By leveraging this cutting-edge technology, cosmetics stores can significantly improve their operational efficiency, enhance customer engagement, and drive business growth. The solution enables real-time visibility into sales performance, customer interactions, and inventory levels, allowing store owners to make data-driven decisions and stay ahead of the competition.

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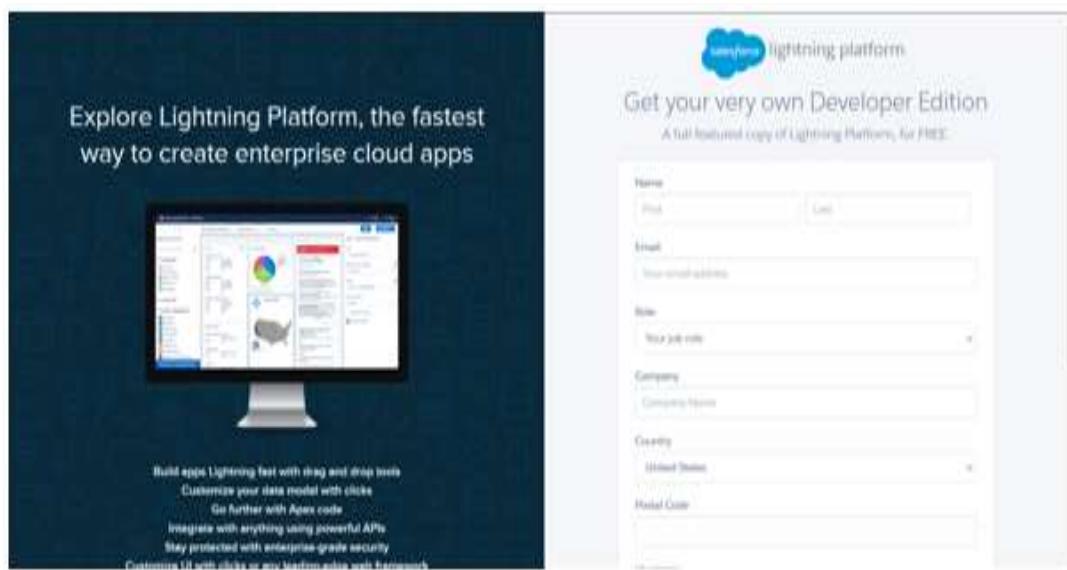
12. Dashboards

1.Creating Developer Account

Creating a developer org in salesforce.

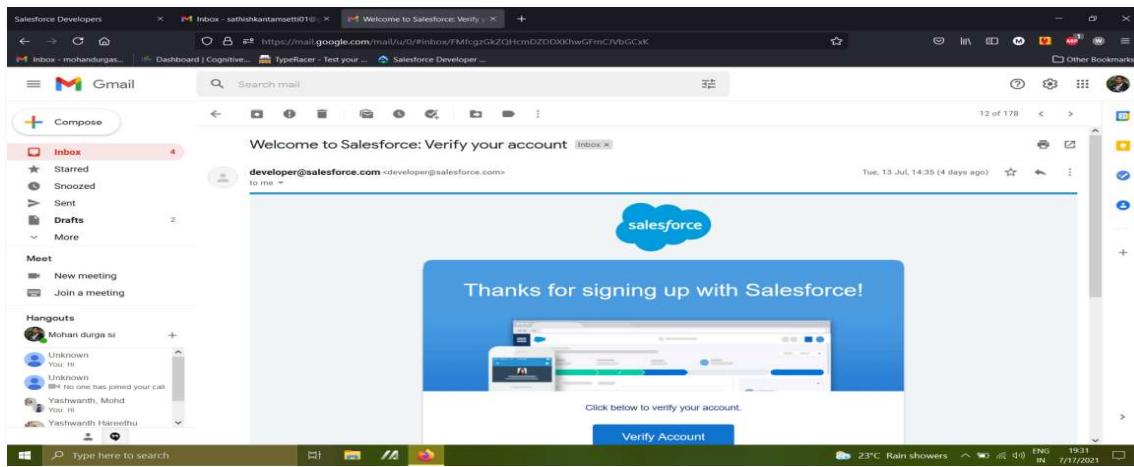
1. Go to developers.salesforce.com/signup.
2. Click on sign up.
3. On the sign up form, enter the following details :
 1. First name & Last name
 2. Email
 3. Role : Developer
 4. Company : College Name
 5. County : India
 6. Postal Code : pin code
 7. Username : should be a combination of your name and company.
..... This need not be an actual email id, you can give anything in the format
..... username@organization.com

Click on sign up after filling these.



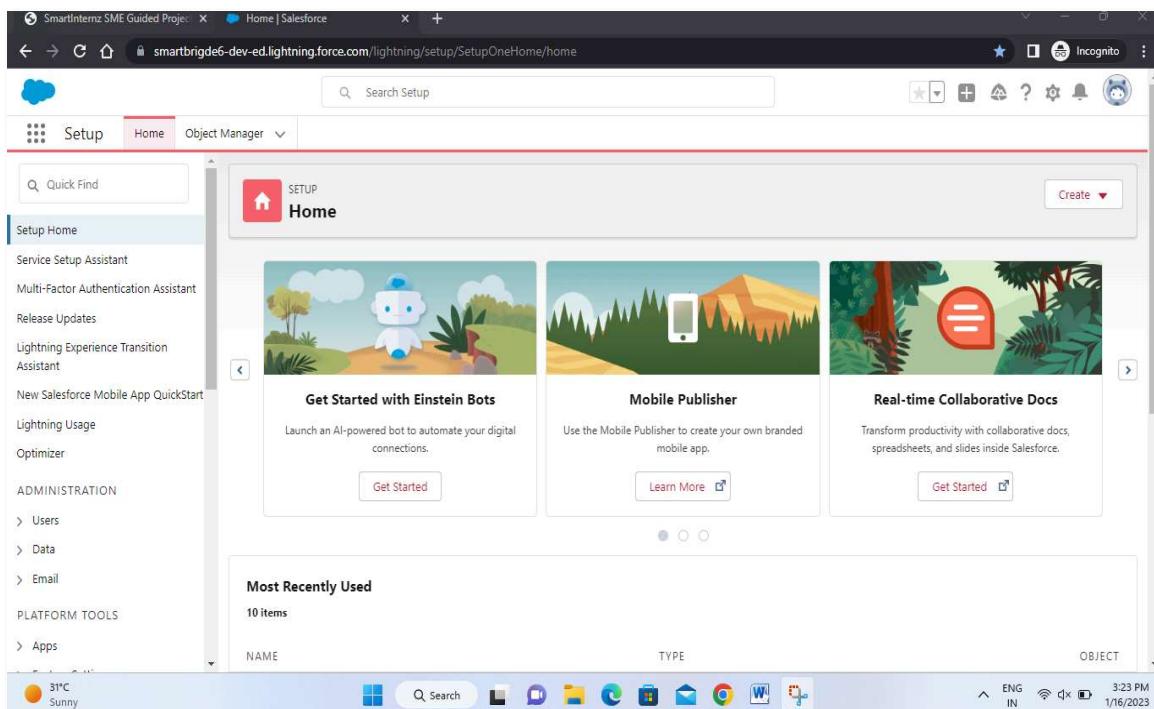
Account Activation

Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins, as



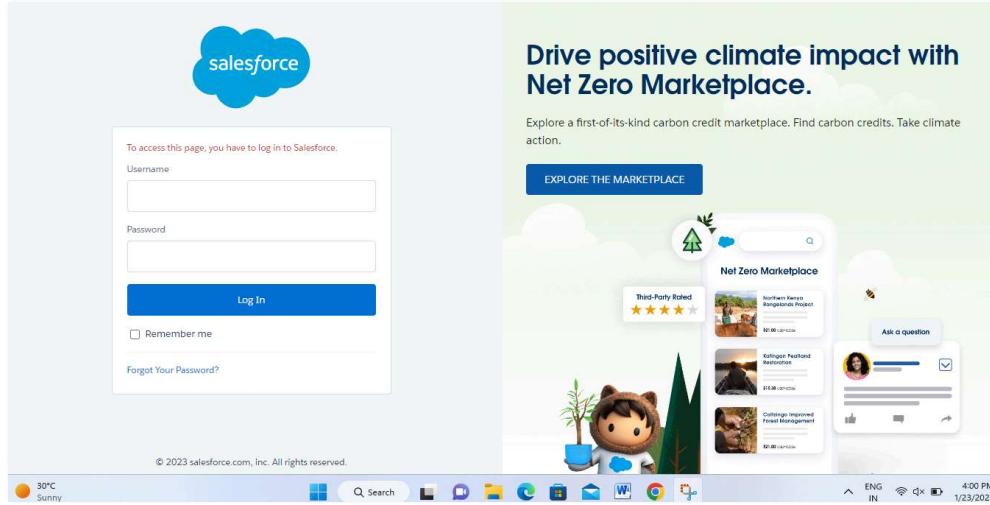
Login To Your Salesforce Account

1. Go to salesforce.com and click on login.
2. Enter the username and password that you just created.
3. After login this is the home page which you will see.



Salesforce Login

<https://login.salesforce.com>



2.Object

Salesforce objects are database tables that permit you to store data that is specific to an organisation.
Salesforce objects are of two types: Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
Custom objects: Our Customers, Consultants, Retailers, Others.

To Create an object:

To Create an object:

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

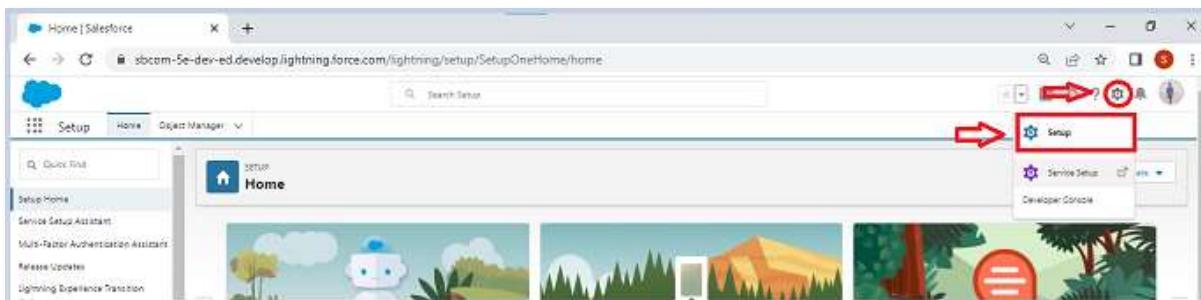
The below steps will assist you in creating those objects.

- Click on the gear icon and then select Setup.
- Click on the object manager tab just beside the home tab.
- After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
- Creation of Our Customer Object

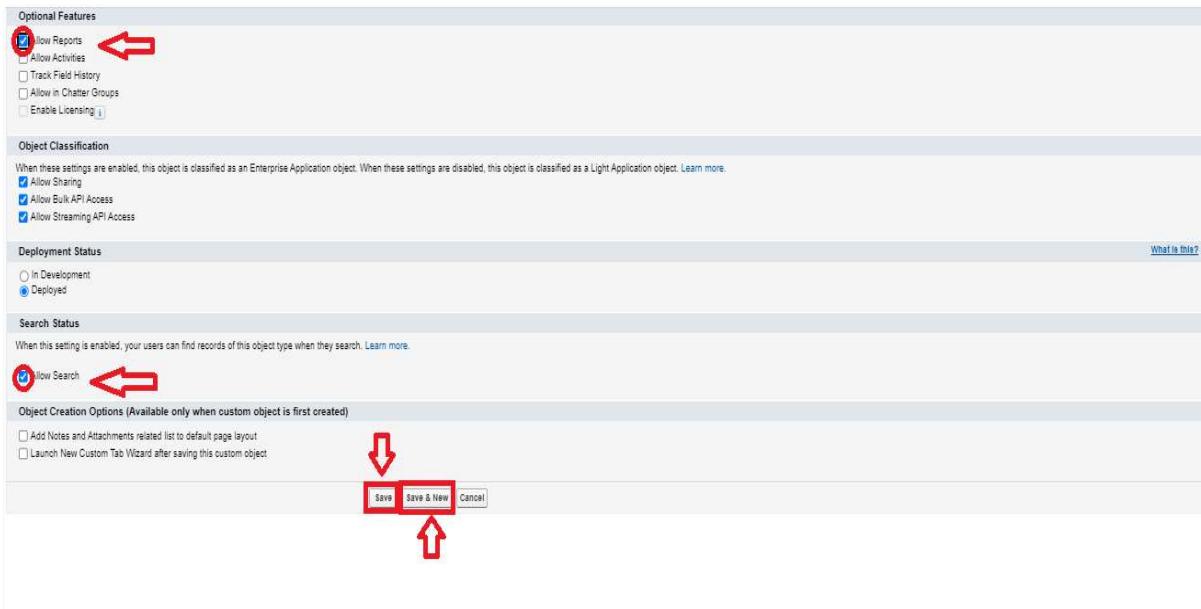
On the Custom Object Definition page, create the object as follows:

- Label: Our Customer
- Plural Label: Our Customers
- Record Name: Our Customer
- Check the Allow Reports checkbox

- Check the Allow Search checkbox
- Click Save.
- Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs.
- Under Custom Object Tabs, click New.
- For Object, select Our Customer.
- For Tab Style, select any icon.
- Leave all defaults as is. Click Next, Next, and Save.



The screenshot shows the 'New Custom Object' setup page. The title bar says 'New Custom Object | Salesforce'. The main form is titled 'Custom Object Definition Edit'. It has sections for 'Custom Object Information' (Label, Label Singular, Label Plural, Starts with same sound), 'Object Name' (Object Name, Example: Case), 'Description' (a large text area), and 'Content-sensitive help setting' (radio buttons for standard help or a window using a Visualforce page). At the bottom, there's a section for 'Enter Record Name Label and Format' with a note about the Record Name appearing in various contexts. There are also 'Optional Features' checkboxes for 'Show Records', 'Allow Activities', and 'Track Field History', with 'Show Records' being circled in red.



Consultants Object Creation

To Create an object:

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 Consultant Object

On the Custom Object Definition page, create the object as follows:

- Label: Consultant
- Plural Label: Consultants
- Record Name: Consultants
- 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 Consultants.
- For Tab Style, select any icon.
- Leave all defaults as is. Click Next, Next, and Save.

Retailers object creation

To Create an object:

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 Retailer Object

On the Custom Object Definition page, create the object as follows:

- Label: Retailer
- Plural Label: Retailers
- Record Name: Retailers
- 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 Retailers.
- For Tab Style, select any icon.
- Leave all defaults as is. Click Next, Next, and Save.

Others Object Creation

To Create an object:

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 others Object

On the Custom Object Definition page, create the object as follows:

- Label: other
- Plural Label: others
- Record Name: others
- 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 others.
- For Tab Style, select any icon.
- Leave all defaults as is. Click Next, Next, and Save.

3.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

4. Page Layouts

In Salesforce, page layouts define the organisation 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 organisation.

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 for the 'Consultant' object. The left sidebar has a 'Page Layouts' link 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 'PAGE LAYOUT NAME' column shows 'Consultant Layout', the 'CREATED BY' column shows 'Hazari Ajay Kumar, 4/1/2023, 7:25 AM', and the 'MODIFIED BY' column shows 'Hazari Ajay Kumar, 6/18/2023, 10:30 PM'. A red box with the number '2' highlights the 'Consultant Layout' row in the table.

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

SETUP > OBJECT MANAGER

Consultant

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

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

Fields

Quick Find Field Name

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)

Customer id	GEN-2004-001234	Owner	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		

Address

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

Quick Find Field Name

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)

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

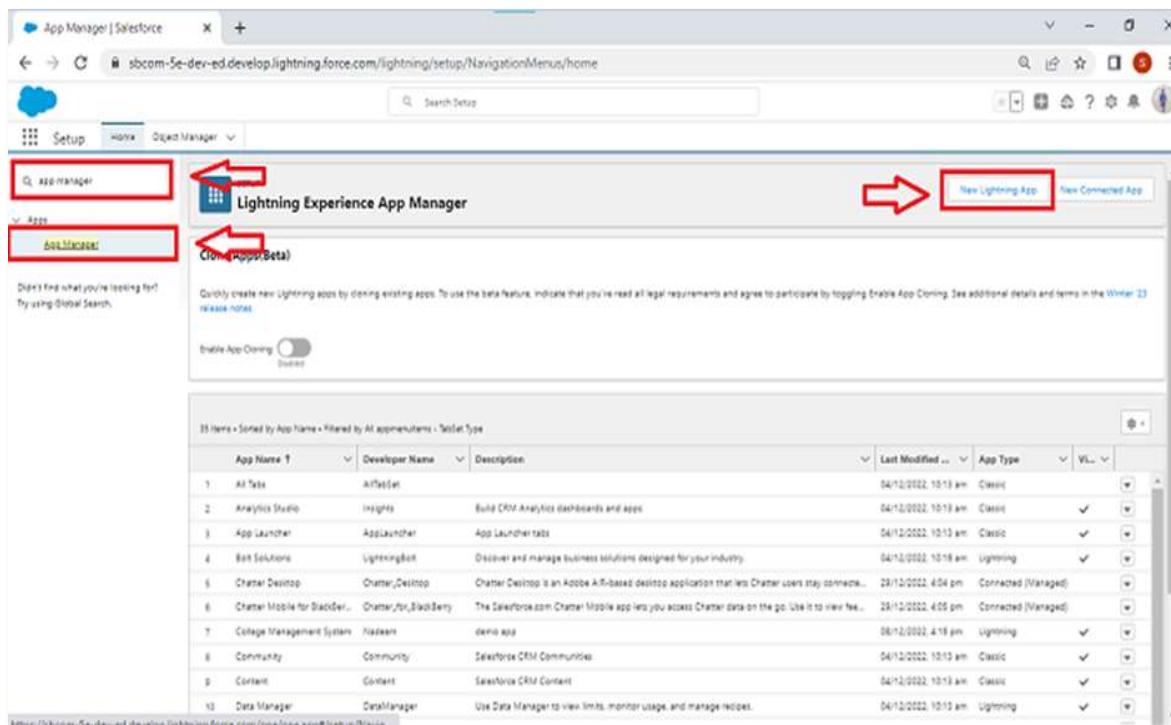
5.The Lightning App

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.

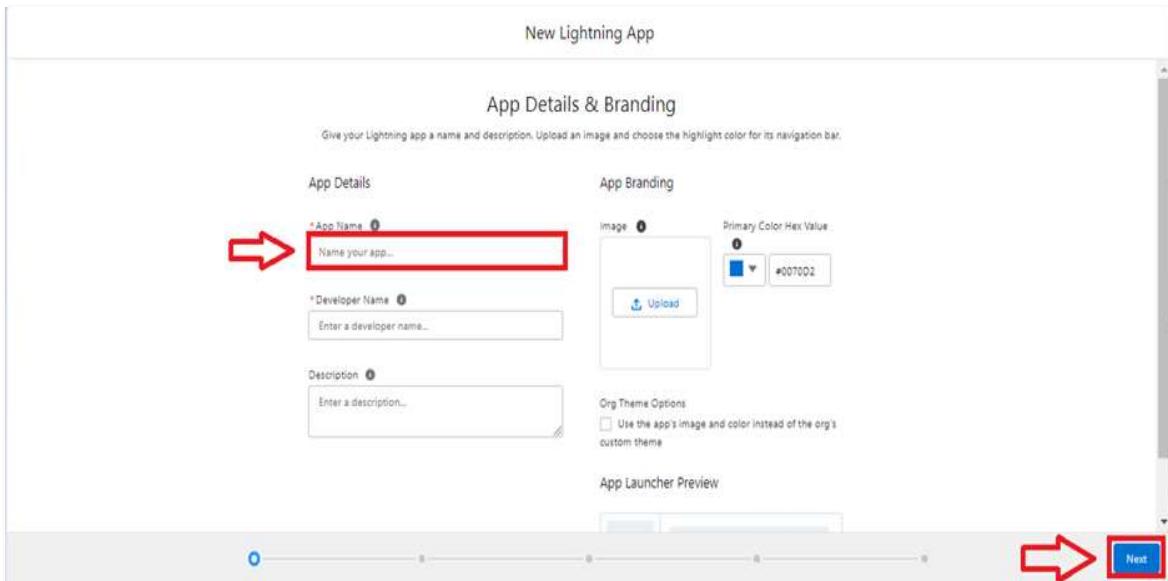
Create a Lightning App

To create a lightning app page:

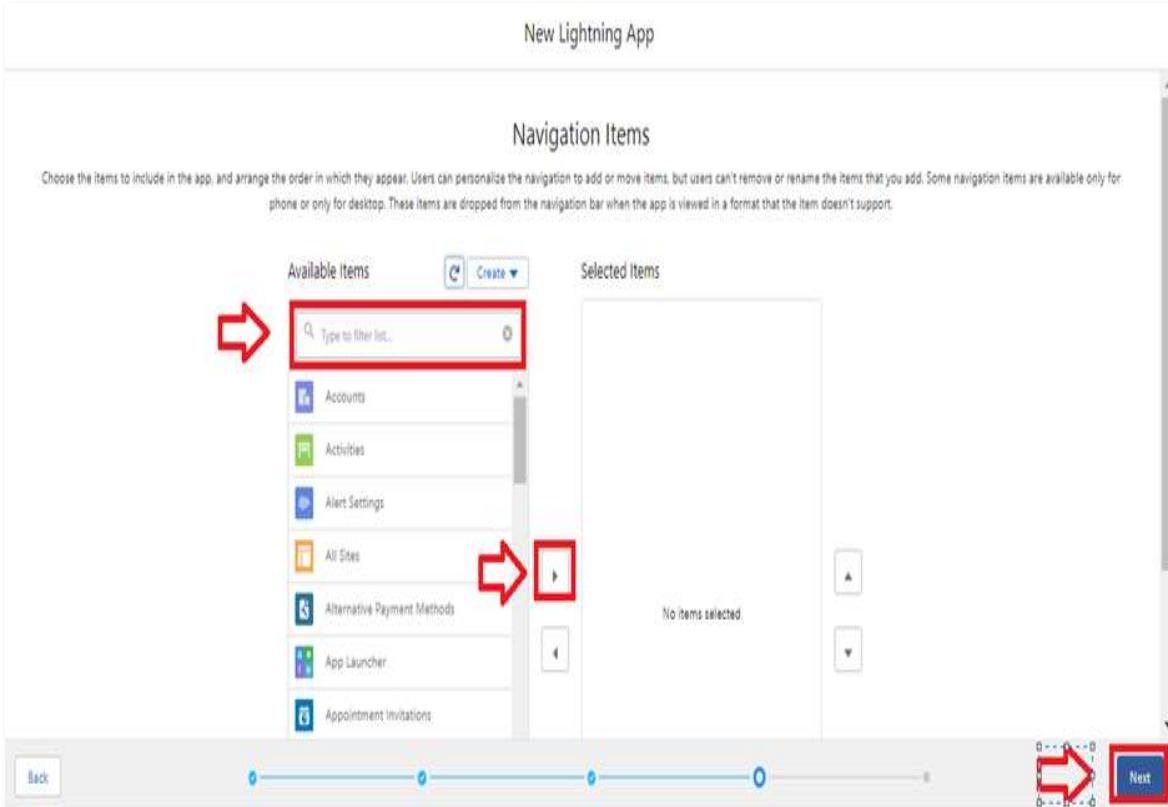
1.Go to setup page --> search “app manager” in quick find --> select “app manager” --> click on New lightning App.



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

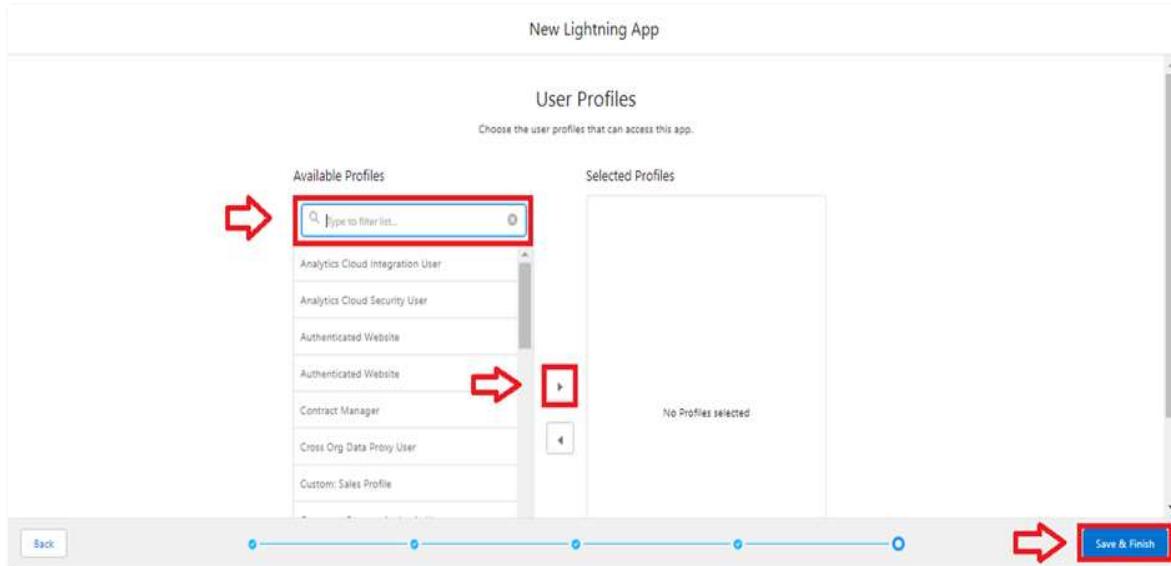


3. To Add Navigation Items:



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.

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.

Creating a Profiles

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

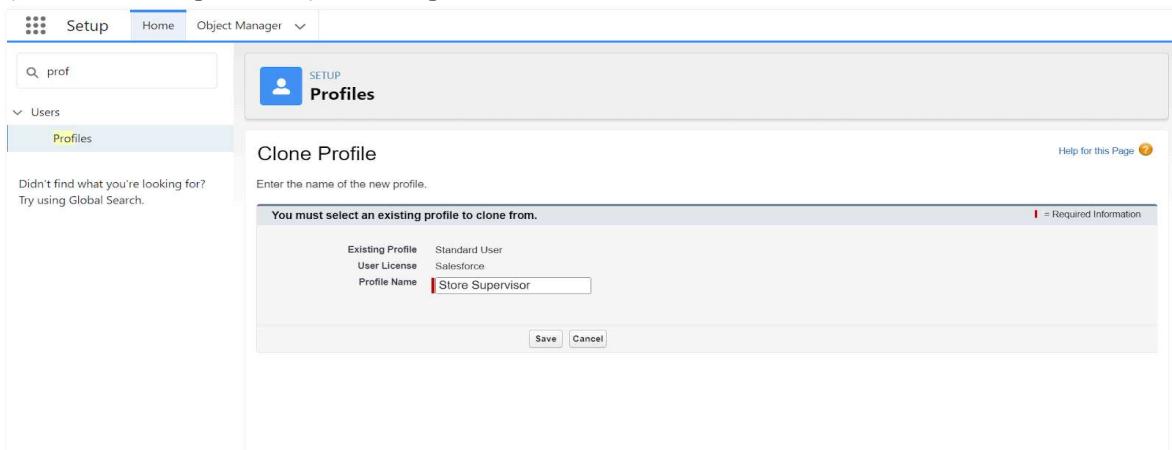
Creating a Profiles:

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

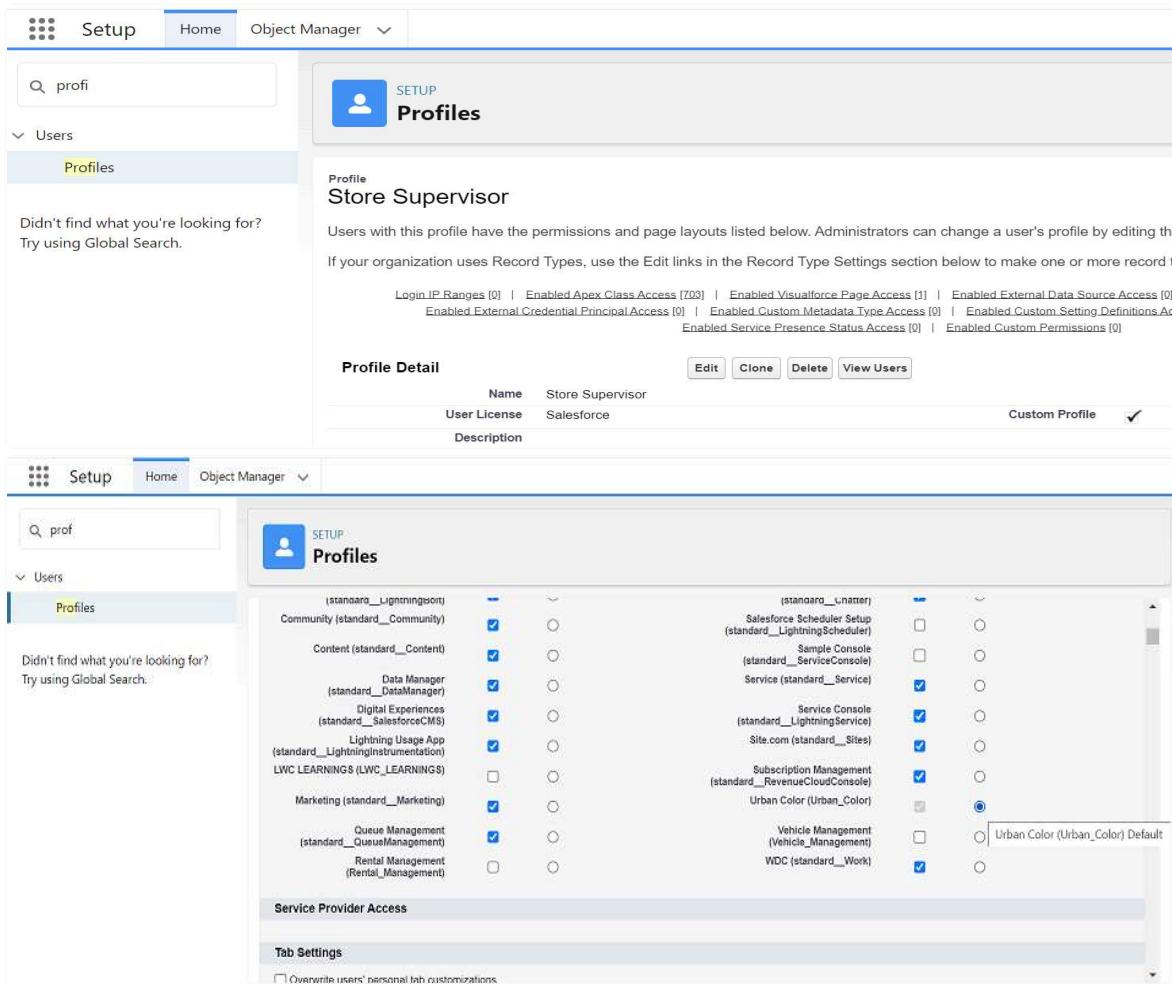
- From Setup enter Profiles in the Quick Find box, and select Profiles.
- From the list of profiles, find Standard User.
- Click Clone.
- For Profile Name, enter Store Supervisor.
- Click Save.
- While still on the Store Supervisor profile page, then click Edit.
- Scroll down to Custom Object Permissions 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.



3. Scroll down to the Custom object permission and give all access to the Consultants, Others, Our Customers, Retailers object.

| Async Operation Results | <input type="checkbox"/> |
|--------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Back Syncs | <input type="checkbox"/> |
| Branches | <input type="checkbox"/> |
| Change Bundles | <input type="checkbox"/> |
| Change Bundle Installs | <input type="checkbox"/> |
| Change Submissions | <input type="checkbox"/> |
| Commercial Vehicles | <input type="checkbox"/> |
| Consultants | <input checked="" type="checkbox"/> |
| Customers1 | <input type="checkbox"/> |
| Customer Details | <input type="checkbox"/> |
| Deploy Components | <input type="checkbox"/> |
| Deployment Results | <input type="checkbox"/> |
| Others | <input checked="" type="checkbox"/> |
| Our Customers | <input checked="" type="checkbox"/> |
| Pipelines | <input type="checkbox"/> |
| Pipeline Stages | <input type="checkbox"/> |
| Projects | <input type="checkbox"/> |
| Properties | <input type="checkbox"/> |
| Remote Changes | <input type="checkbox"/> |
| Rentals | <input type="checkbox"/> |
| Repositories | <input type="checkbox"/> |
| Retailers | <input checked="" type="checkbox"/> |
| Semesters | <input type="checkbox"/> |
| Source Member References | <input type="checkbox"/> |

SETUP Profiles	
Allow CRM for employees	<input type="checkbox"/> i
Password Policies	
User passwords expire in	<input type="text" value="90 days"/>
Enforce password history	<input type="text" value="3 passwords remembered"/>
Minimum password length	<input type="text" value="8"/>
Password complexity requirement	<input type="text" value="Must include alpha and numeric characters"/>
Password question requirement	<input type="text" value="Cannot contain password"/>
Maximum invalid login attempts	<input type="text" value="10"/>
Lockout effective period	<input type="text" value="15 minutes"/>
Obfuscate secret answer for password resets	<input type="checkbox"/>
Require a minimum 1 day password lifetime	<input type="checkbox"/>
Don't immediately expire links in forgot password emails	<input type="checkbox"/> i
<input type="button" value="Save"/> <input type="button" value="Save & New"/> <input type="button" value="Cancel"/>	

4. Click on Save.

5. Similarly Create operator profile ,Clone Salesforce Platform user and give access only for Billing Operator.

The screenshots illustrate the steps to create a new profile and set password policies:

- Screenshot 1: Clone Profile**
Shows the "Clone Profile" screen where a new profile is being created by cloning from "Standard Platform User". The "Profile Name" is set to "Billing Operator".
- Screenshot 2: Profile Edit - Billing Operator**
Shows the "Profile Edit" screen for the "Billing Operator" profile. The profile is a "Custom Profile" (indicated by a checked checkbox). Other settings include "Name: Billing Operator", "User License: Salesforce", and an empty "Description" field.
- Screenshot 3: Profiles - Password Policies**
Shows the "Password Policies" section of the profile edit screen. The configuration includes:
 - 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 (checkbox)
 - Require a minimum 1 day password lifetime (checkbox)
 - Don't immediately expire links in forgot password emails (checkbox)

6. Click On Save

7. Setup Roles

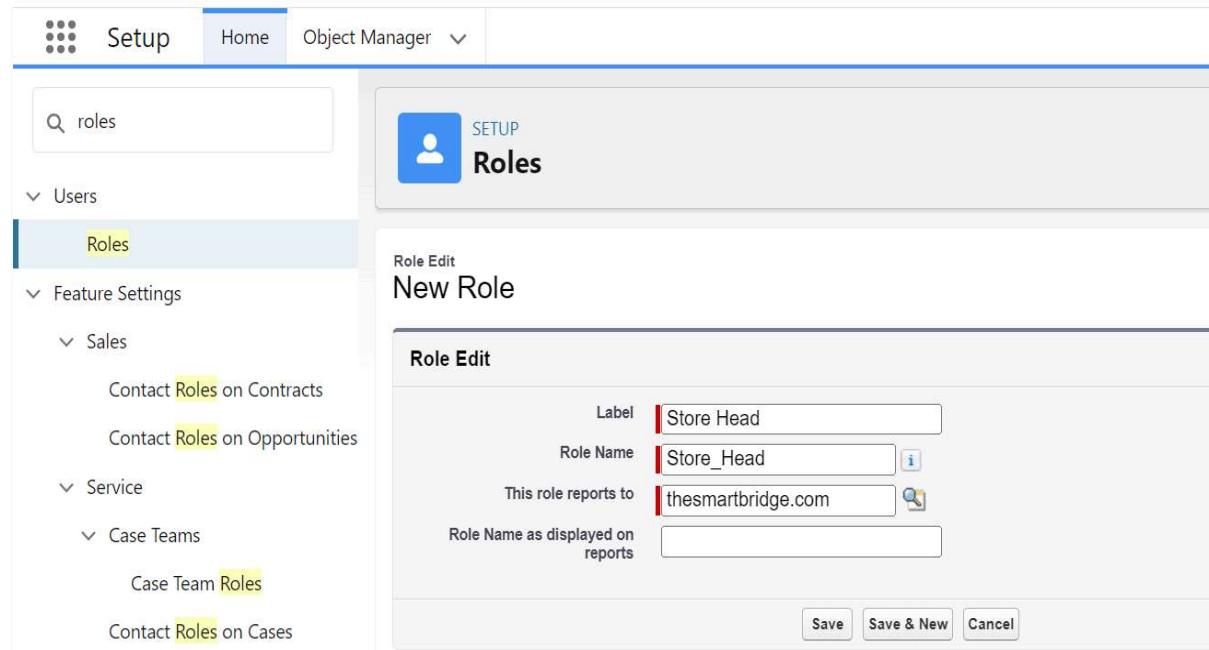
Roles are record-level access controls that define what data a user can see in Salesforce.

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 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 .

Similarly create One Roles under Store Head as Billing Operator.



The screenshot shows the Salesforce Setup interface. In the top navigation bar, 'Setup' is selected. The left sidebar has a search bar and sections for 'Users' (with 'Roles' selected), 'Feature Settings' (under Sales, Service, and Case Teams), and 'Contact Roles' (under Sales, Service, and Case Teams). A note at the bottom says 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'SETUP Roles' and shows a 'New Role' form. The 'Role Edit' section contains fields for 'Label' (set to 'Billing Operator'), 'Role Name' (set to 'Billing_Operator'), 'This role reports to' (set to 'Store Head'), and 'Role Name as displayed on reports' (empty). Buttons at the bottom include 'Save', 'Save & New', and 'Cancel'. A 'Help for this Page' link is in the top right.

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 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 consists of two vertically stacked screenshots of the Salesforce Setup interface, both centered on the 'Users' section.

Screenshot 1: User Edit Tab

- General Information:**
 - First Name: Amar
 - Last Name: k
 - Alias: ak
 - Email: mailid@gmail.com
 - Username: amark2133@salesforce.cor
 - Nickname: User167161323313747430
 - Title: Store Supervisor
 - Company:
 - Department:
 - Division:
- Role:** Store Head
- User License:** Salesforce
- Profile:** Store Supervisor
- Active:**
- Marketing User:**
- Offline User:**
- Knowledge User:**
- Flow User:**
- Service Cloud User:**
- Site.com Contributor User:**
- Site.com Publisher User:**
- WDC User:**
- Data.com User Type:** --None--

Screenshot 2: Single Sign On Information Tab

- 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

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 John Teddy 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(Billing Operator)
5. Select a User Licence 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.

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

User Edit

General Information

First Name	John	Role	Billing Operator
Last Name	Tedd	User License	Salesforce Platform
Alias	jtedd	Profile	Billing Operator
Email	toddyjohn@gmail.com	Active	<input checked="" type="checkbox"/>
Username	johnteddy@salesforce.com	Marketing User	<input type="checkbox"/>
Nickname	User16716029867441831	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"/>
		Site.com Publisher User	<input type="checkbox"/>
		WDC User	<input type="checkbox"/>
		Data.com User Type	-None-
		Data.com Monthly Addition Limit	300
		Accessibility Mode (Classic Only)	<input type="checkbox"/>
		High-Contrast Palette on Charts	<input type="checkbox"/>
		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
		Debug Mode	<input type="checkbox"/>
		Make Setup My Default Landing Page	<input type="checkbox"/>

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

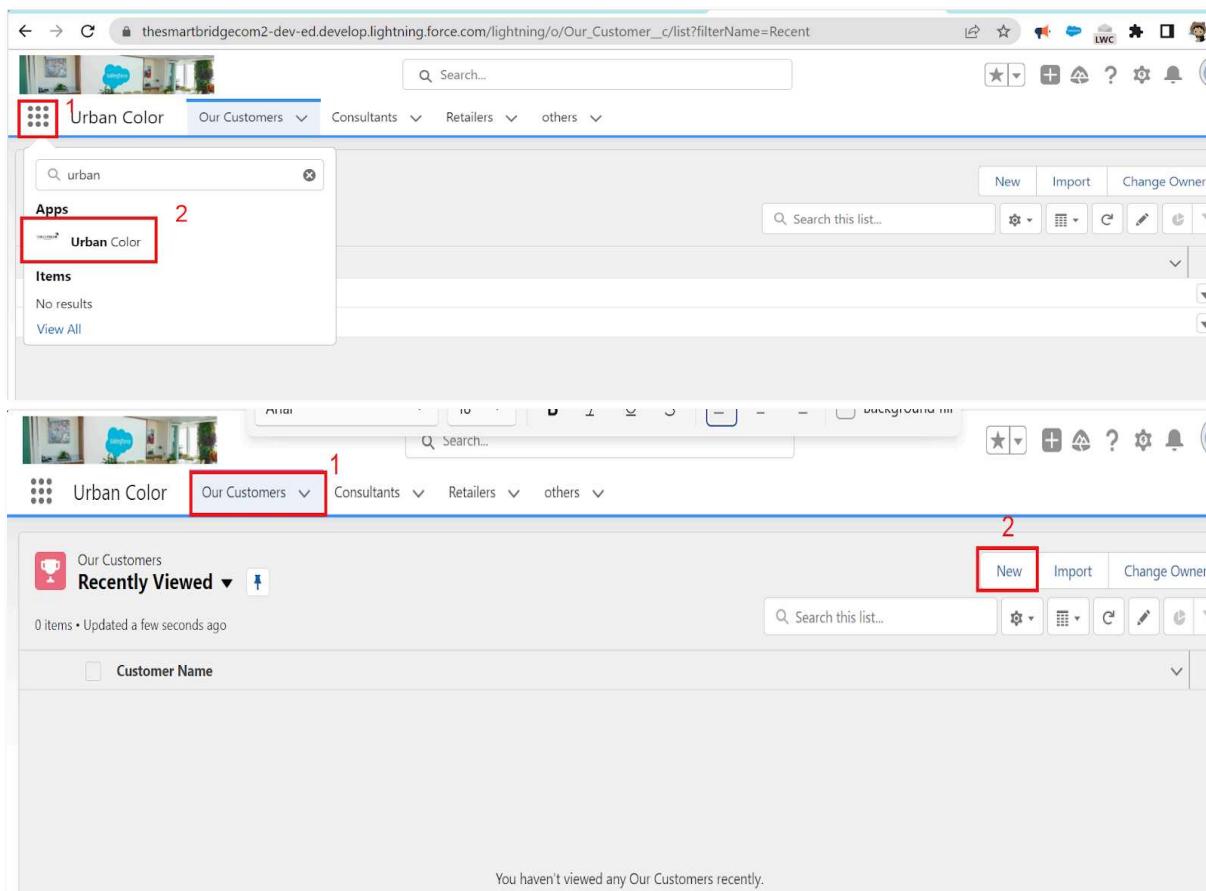
Generate new password and notify user immediately

9. User Adoption

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

Create Our Customer Record

1. Click on App Launcher on left side of screen.
2. Search Urban Color & click on it.
3. Click on Our Customer tab.
4. Click new button
5. Fill all Our Customer record details.
6. Click on Save Button



Information 1

*Customer Name
 Complete this field.

Owner
 Hazari Ajay Kumar

Customer id

*Phone

Email id

Address

2

View Record (Our Customer)

View Record (Our Customer):

1. Click on App Launcher on the left side of the screen.
2. Search Urban Color & click on it.
3. Click on Our Customer Tab.
4. Click on any record name. you can see the details of the Our Customer

1

Urban Color Our Customers Consultants Retailers others

2 items • Updated a few seconds ago

	Customer Name
1	<input type="checkbox"/> Suresh 2
2	<input type="checkbox"/> Kamal

New Import Change Owner

Search this list...

2

Our Customer Suresh

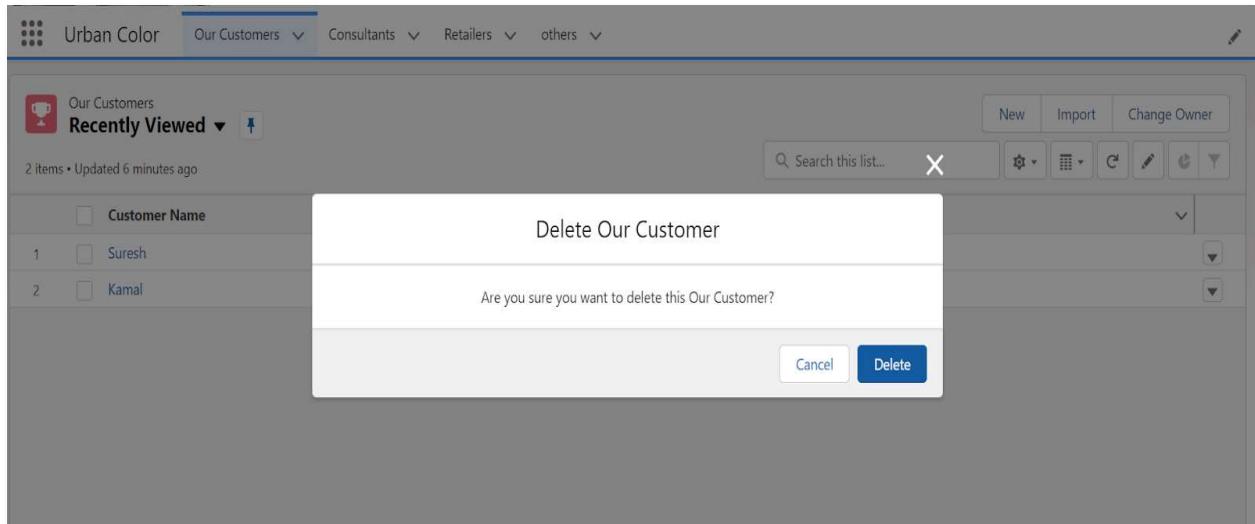
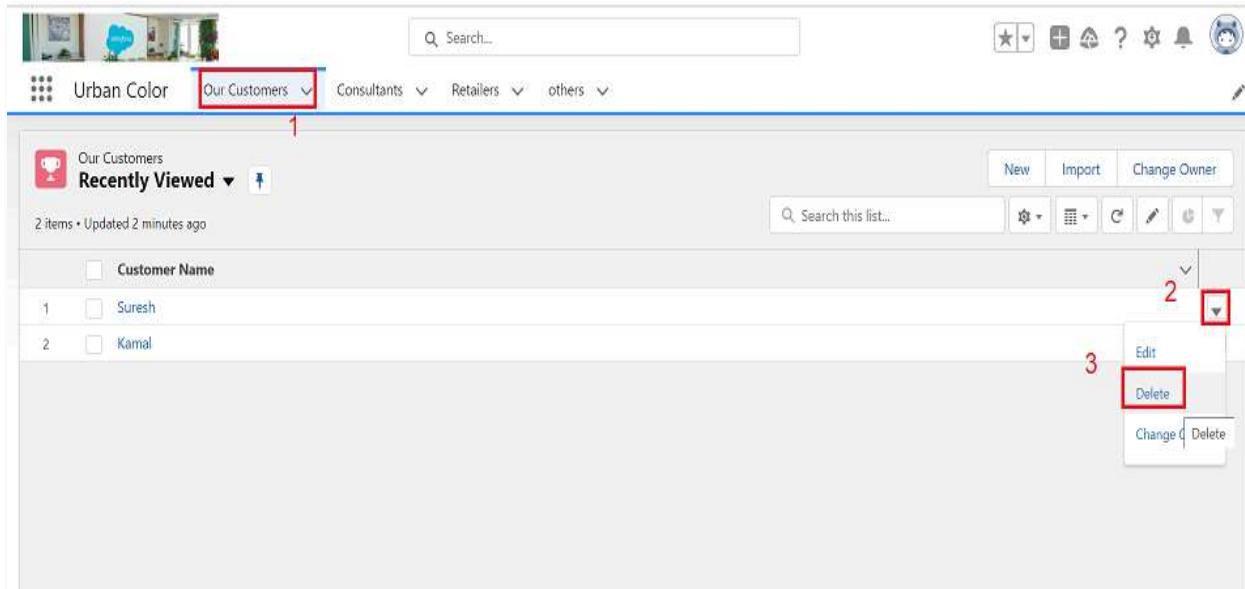
Related Details

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

Delete Record (Our Customer)

Delete Record (Our Customer):

1. Click on App Launcher on the left side of the screen.
2. Search Urban Color & click on it.
3. Click on Our Customer Tab.
4. Click on Arrow at right hand side on that Particular record.
5. Click delete and delete again.

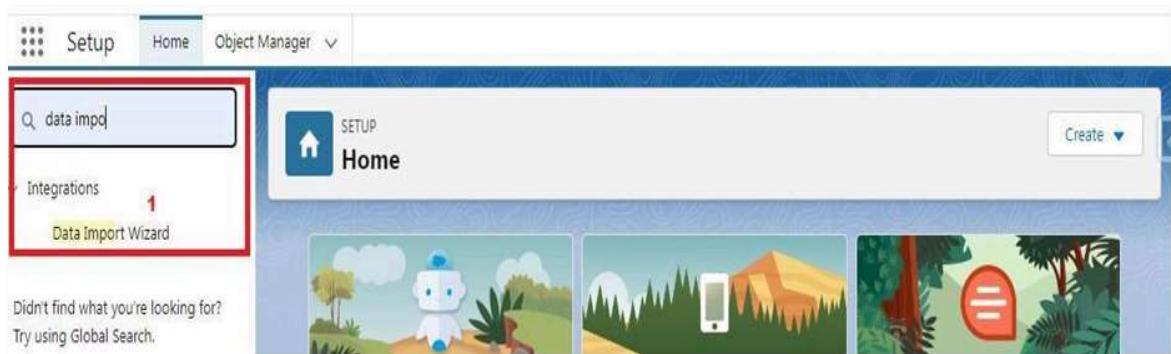


10.Import Data

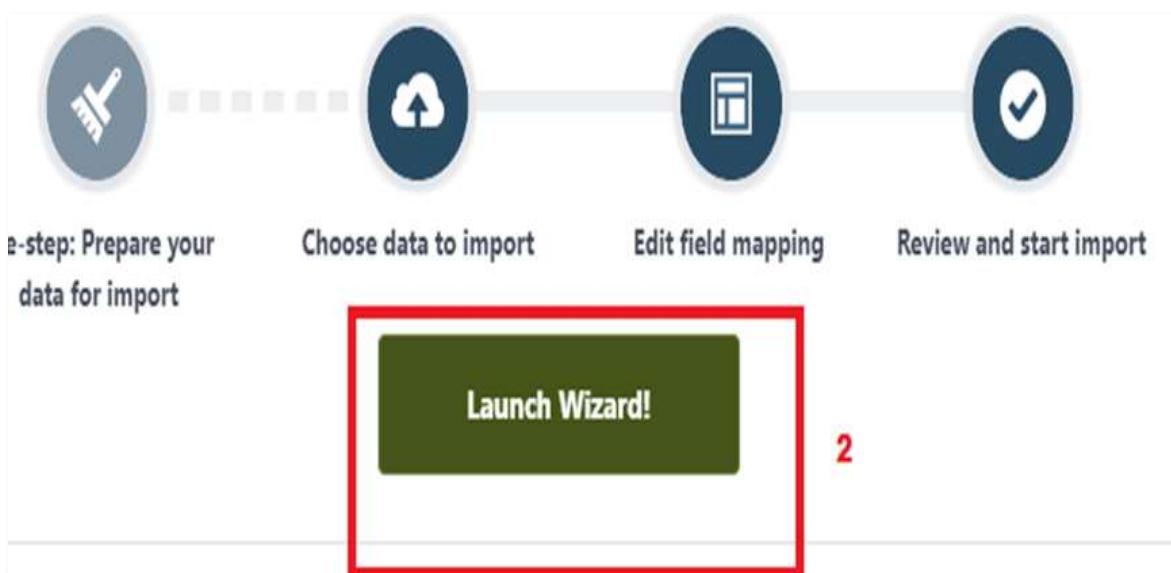
Data Import Wizard—this tool, accessible through the Setup menu, lets you import data in common standard objects, such as contacts, leads, accounts, as well as data in custom objects.

To Import Data

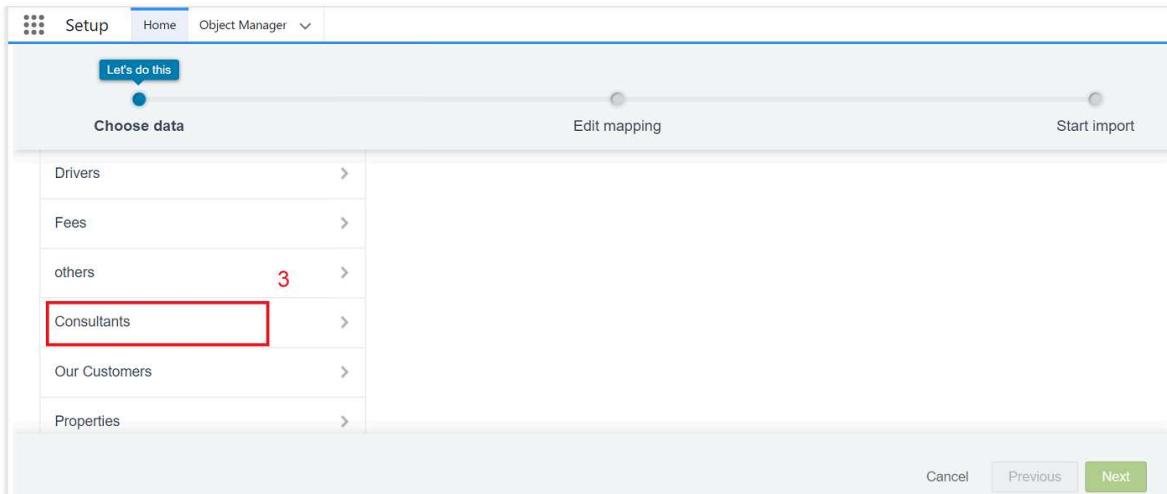
- 1.From Setup, click the Home tab.
- 2.In the Quick Find box, enter Data Import and select Data Import Wizard



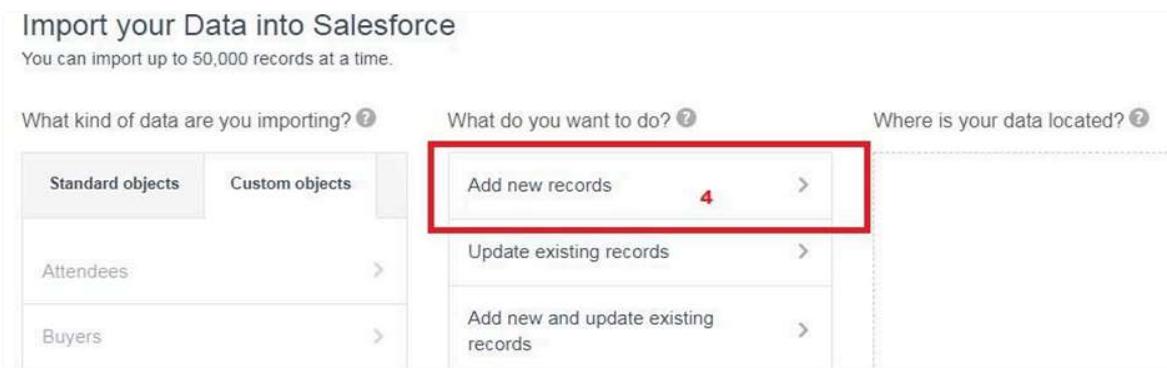
- 3.Click Launch Wizard!



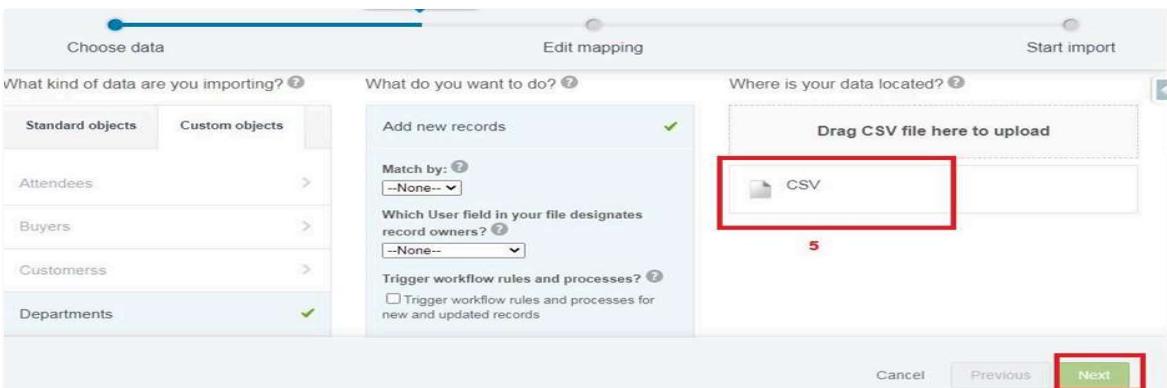
4. Click the Custom Objects tab and select the Consultant object.



5. Select Add new records.



6. Click CSV and choose file Consultant_CSV which we made earlier. Click 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.

The screenshot shows the 'Edit Field Mapping' step in the Data Loader. At the top, there's a progress bar with three stages: 'Choose data', 'Edit mapping' (which is currently active), and 'Start import'. Below the progress bar, the title is 'Edit Field Mapping: Consultants'. A note says, 'Your file has been auto-mapped to existing Salesforce fields, but you can edit the mappings if you wish. Unmapped fields will not be imported.' The main area is a table with columns: 'Edit', 'Mapped Salesforce Object', 'CSV Header', 'Example', 'Example', and 'Example'. The 'Mapped Salesforce Object' column is highlighted with a red box. The data rows are:

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

At the bottom right, there are buttons for 'Cancel', 'Previous', and 'Next', with 'Next' being highlighted by a red box.

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

The screenshot shows the 'Review & Start Import' step. At the top, there's a progress bar with three stages: 'Choose data', 'Edit mapping', and 'Start import'. Below the progress bar, the title is 'Review & Start Import'. A note says, 'Review your import information and click Start Import.' The main area is divided into three sections: 'Your selections:', 'Your import will include:', and 'Your import will not include:'. The 'Your import will include:' section is highlighted with a red box. It contains three boxes: 'Your selections:' (with 'Consultants' checked), 'Your import will include:' (with '7' mapped fields), and 'Your import will not include:' (with '0' unmapped fields). At the bottom right, there are buttons for 'Cancel', 'Previous', and 'Start Import', with 'Start Import' being highlighted by a red box.

9. Click OK on the popup.

The screenshot shows a confirmation message in a modal window. The text reads: 'Congratulations, your import has started! Click OK to view your import status on the Bulk Data Load Job page.' At the bottom right of the modal, there is a green 'OK' button, which is highlighted with a red box.

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	7512w00000Xqar	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 - Do Field mapping carefully.

11.What are Reports?

Reports:

Reports in Salesforce is a list of records that meet a particular criterion which gives an answer to a particular question. These records are displayed as a table that can be filtered or grouped based on any field.

There are 4 types of report formats in Salesforce:

1. Tabular Reports:

This is the most basic report format. It just displays the row of records in a table with a grand total. While easy to set up they can't be used to create groups of data or charts and also cannot be used in Dashboards. They are mainly used to generate a simple list or a list with a grand total.

2. Summary Reports:

It is the most commonly used type of report. It allows grouping of rows of data, view subtotal, and create charts.

3. Matrix Report:

It is the most complex report format. Matrix report summarizes information in a grid format. It allows records to be grouped by both columns and rows. It can also be used to generate dashboards. Charts can be added to this type of report.

4. Joined Reports:

These types of reports let us create different views of data from multiple report types. The

data is joined reports are organized in blocks. Each block acts as a subreport with its own fields, columns, sorting, and filtering. They are used to group and show data from multiple report types in different views.

Report types:

Report type determines which set of records will be available in a report. Every report is based on a particular report type. The report type is selected first when we create a report. Every report type has a primary object and one or more related objects. All these objects must be linked together either 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:

Standard Report Types are automatically included with standard objects and also with custom objects where "Allow Reports" is checked.

Standard report types cannot be customized and automatically include standard and custom fields for each object within the report type. Standard report types get created when an object is created, also when a relationship is created.

Note: Standard report types always have inner joins.

2. Custom Report Types:

Custom report types are reporting templates created to streamline the reporting process.

Custom Reports are created by an administrator or User with "Manage Custom Report Types" permission. Custom report types are created when standard report types cannot specify which records will be available on reports.

In custom report types we can specify objects which will be available in a particular report. The primary object must have a relationship with other objects present in a report type either directly or indirectly.

There are 3 types of access levels of folders:

1. Viewer:

With this access level, users can see the data in a report but cannot make any changes except cloning it into a new report.

2. Editor:

With this access level, users can view and modify the reports it contains and can also move them to/from any other folders they have access level as Editor or Manager.

3. Manager:

With this access level, users can do everything Viewers & Editors can do, plus they can also control other user's access levels to this folder. Also, users with Manager Access levels can delete the report.

Create Report

1.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

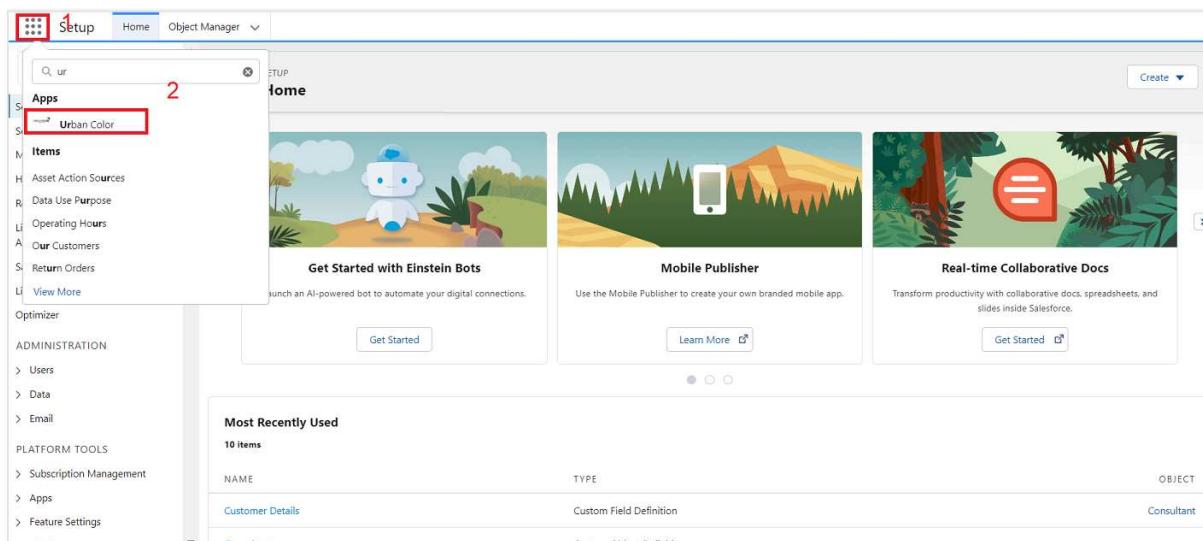
9.Click on Add Bucket and name it as NetBanking

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 Consultant: Consultant Name Delivery Type Products Payment

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

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

Update Preview Automatically

Save & Run Save Close Run

REPORT ▾

New Consultants Report / Consultants

Fields > Outline Filters

Groups GROUP ROWS Add group...

Columns Consultant: Consultant Name Delivery Type Products Payment 1

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

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

Update Preview Automaticall

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

Save & Run Save Close Run

Edit Bucket Column

* Field

* Bucket Name

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

Edit Bucket Column

* Field * Bucket Name

All Values (4)	Search Values
<input type="text" value="Bucket Name"/> 2	<input type="text"/>
Unbucketed Values (4)	<input type="text"/>
<input type="checkbox"/> Bucket remaining values as Other	<input type="text"/>

Add Bucket 1

Edit Bucket Column

* Field * Bucket Name

All Values (4)	Search Values
<input type="text" value="Net Banking (0)"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>	<input type="text"/>
<input type="text" value="Cash (0)"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>	<input type="text"/>
Unbucketed Values (4)	<input type="text"/>
<input type="checkbox"/> Bucket remaining values as Other	<input type="text"/>

Edit Bucket Column

* Field: Payment * Bucket Name: Payment type

All Values (4)	
	Net Banking (0) <input type="button" value="Edit"/> <input type="button" value="Delete"/>
	Cash (0) <input type="button" value="Edit"/> <input type="button" value="Delete"/>
Unbucketed Values (4)	

Bucket remaining values as Other

Add Bucket

Search Values

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

Edit Bucket Column

* Field: Payment * Bucket Name: Payment type

All Values (4)	
	Net Banking (0) <input type="button" value="Edit"/> <input type="button" value="Delete"/>
	Cash (0) <input type="button" value="Edit"/> <input type="button" value="Delete"/>
Unbucketed Values (4)	

Bucket remaining values as Other

Add Bucket

Search Values

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

Net Banking

Cash

Unbucketed Values

New Bucket

Edit Bucket Column

* Field	* Bucket Name												
Payment	X Payment type												
All Values (4)	<table border="1"> <thead> <tr> <th colspan="2">Search Values</th> </tr> <tr> <th>VALUE</th> <th>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><input checked="" type="checkbox"/> Cash</td> <td>Cash</td> </tr> </tbody> </table>	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
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												
Unbucketed Values (1)													
<input type="checkbox"/> Bucket remaining values as Other													
Add Bucket	Move To ▾												
<input type="button" value="Cancel"/> <input type="button" value="Apply"/>													

Edit Bucket Column

* Field	* Bucket Name						
Payment	X Payment type						
All Values (4)	<table border="1"> <thead> <tr> <th colspan="2">Search Values</th> </tr> <tr> <th>VALUE</th> <th>BUCKET</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/> Cash (1)</td> <td>Cash</td> </tr> </tbody> </table>	Search Values		VALUE	BUCKET	<input checked="" type="checkbox"/> Cash (1)	Cash
Search Values							
VALUE	BUCKET						
<input checked="" type="checkbox"/> Cash (1)	Cash						
Unbucketed Values (0)							
<input type="checkbox"/> Bucket remaining values as Other							
Add Bucket	Move To ▾						
<input type="button" value="Cancel"/> <input type="button" value="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

The image consists of two vertically stacked screenshots of a report configuration interface, likely from a business intelligence tool like QlikView or QlikSense.

Screenshot 1: This screenshot shows the report configuration for "New Consultants Report". The "Fields" pane on the left has a "Groups" section with "GROUP ROWS" selected. A red box highlights the "Columns" section, which contains fields: "Add column...", "Consultant: Consultant Name", "Delivery Type", "Products", "Payment", and "Payment type". Another red box highlights the "Payment type" field. The main preview area shows a table with 9 rows of data, grouped by "Payment type".

	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

Screenshot 2: This screenshot shows the same report configuration after saving and running. The "Fields" pane now has "GROUP ROWS" and "Payment type" selected under "Groups". A red box highlights the "Payment type" field. The main preview area shows the same 9 rows of data, but the table structure has changed. It includes a header row for "Payment type" and a group header "Net Banking (7)". Below the main data, there are subtotal rows for "Cash (2)" and "Total (9)".

Payment type	Consultant: Consultant Name	Delivery Type	Products	Payment
Net Banking (7)	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:

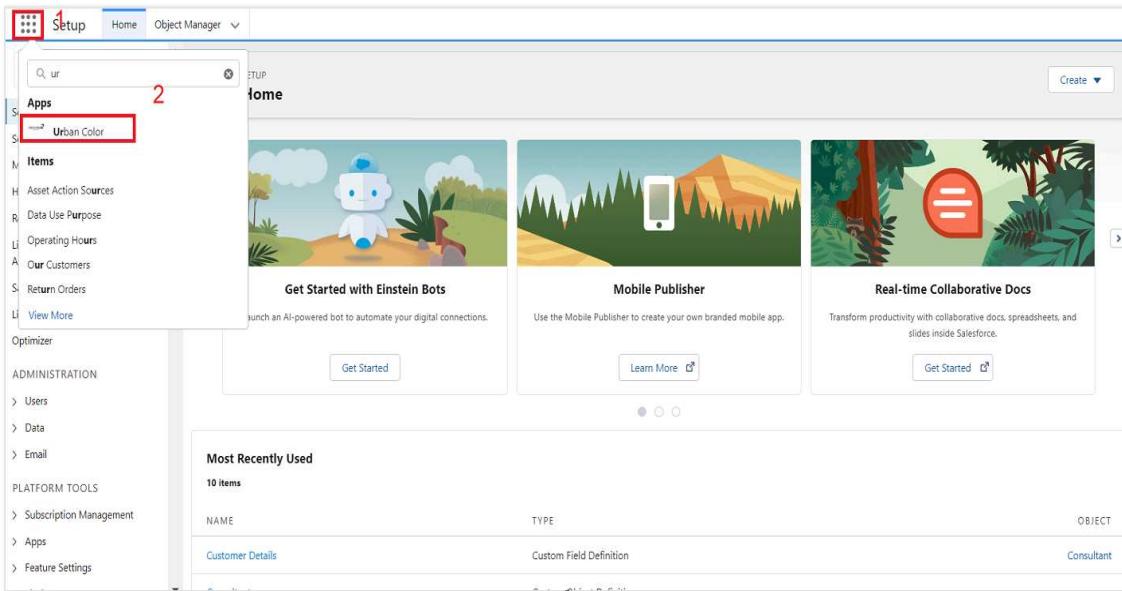
Cash (2)	Dev Raj	Self Pickup	Lipstick	Cash
	Shankar	Self Pickup	Face Pack	Cash
Total (9)				

Save Report

<input style="width: 100%;" type="text" value="Report Name"/> <input style="width: 100%;" type="text" value="Consultants Report"/>	1	
<input style="width: 100%;" type="text" value="Report Unique Name"/> <input style="width: 100%;" type="text" value="Consultants_Report_hvb"/>		
<input style="width: 100%;" type="text" value="Report Description"/>		
<input style="width: 100%;" type="text" value="Folder"/> <input style="width: 100%;" type="text" value="Private Reports"/>	2	
	<input type="button" value="Cancel"/> <input style="background-color: #0070C0; color: white; border: 1px solid #0070C0;" type="button" value="Save"/>	3

View Report

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 App Launcher interface. On the left, there's a sidebar with various categories like Setup, Home, Object Manager, and Administration. A search bar at the top has 'ur' typed into it. Below the search bar, under the 'Apps' section, the 'Urban Color' app is listed and highlighted with a red box and the number '2'. The main content area displays three cards: 'Get Started with Einstein Bots', 'Mobile Publisher', and 'Real-time Collaborative Docs'. At the bottom, there's a section titled 'Most Recently Used' with a table showing one item: 'Customer Details' (Custom Field Definition) for 'Consultant'.

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

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

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.

Recent						
DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed

New Dashboard

* Name

3

Consultant Dashboard

Description

Folder

Private Dashboards

Select Folder

4

Cancel

Create



Search...



Urban Color

Our Customers

Consultants

Retailers

others

Reports

Dashboards

Consultant Dashboard

+ Component

5

+ Filter

Save

Select Report

Reports

Recent

Created by Me

Private Reports

Public Reports

All Reports

Folders

Created by Me

Shared with Me

All Folders

Select Report

Search Reports and Folders...

Reports and Folders

6

Consultants Report

Hazari Ajay Kumar - [REDACTED] Private Reports

Sample Flow Report: Screen Flows

Automated Process · Dec 17, 2022, 7:50 PM · Public Reports

Opportunities Details

Hazari Ajay Kumar · Apr 13, 2023, 12:02 AM · Private Reports

Rental New 1

Hazari Ajay Kumar · Feb 2, 2023, 10:43 PM · Public Reports

Cancel

Select

Add Component

Report

Consultants Report X

Use chart settings from report i

Display As 7

Payment type

X-Axis

Record Count

Preview

Consultants Report

Record Count

Payment type	Record Count
Net Banking	7
Cash	2

[View Report \(Consultants Report\)](#)

Cancel
Add 8

Urban Color Our Customers Consultants Retailers others Reports Dashboards

Consultant Dashboard

Consultants Report

Record Count

Payment type	Record Count
Net Banking	7
Cash	2

[View Report \(Consultants Report\)](#)

+ Component Save 9 Done

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

2

NAME	TYPE	OBJECT
Customer Details	Custom Field Definition	Consultant

3

4

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