

# **Cosmetics Store Management**

Developed by:

M.GOWTHAMI

224g5a0203@srit.ac.in

## 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.

# Index Page

## **Topics**

1. Creation Salesforce Org
2. Object
3. Fields And Relationships
4. Page Layouts
5. The Lightning App
6. Profile
7. Setup Roles
8. Users
9. User Adoption
10. Import Data
11. Reports
12. Dashboards

# 1. Creating Developer Account

Creating a developer org in salesforce.

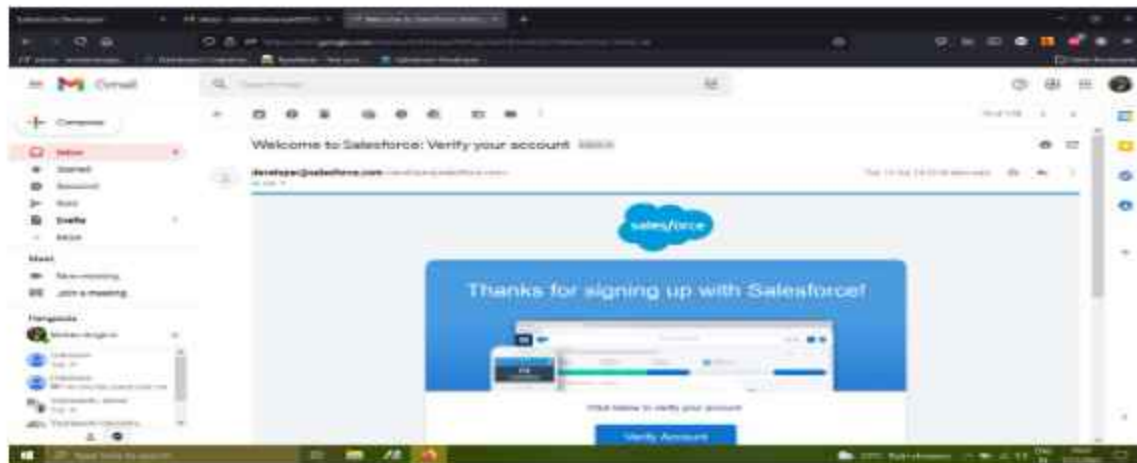
1. Go to [developers.salesforce.com/signup](https://developers.salesforce.com/signup).
2. Click on sign up.
3. On the sign up form, enter the following details :
  1. First name & Last name
  2. Email
  3. Role : Developer
  4. Company : College Name
  5. County : India
  6. Postal Code : pin code
  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.



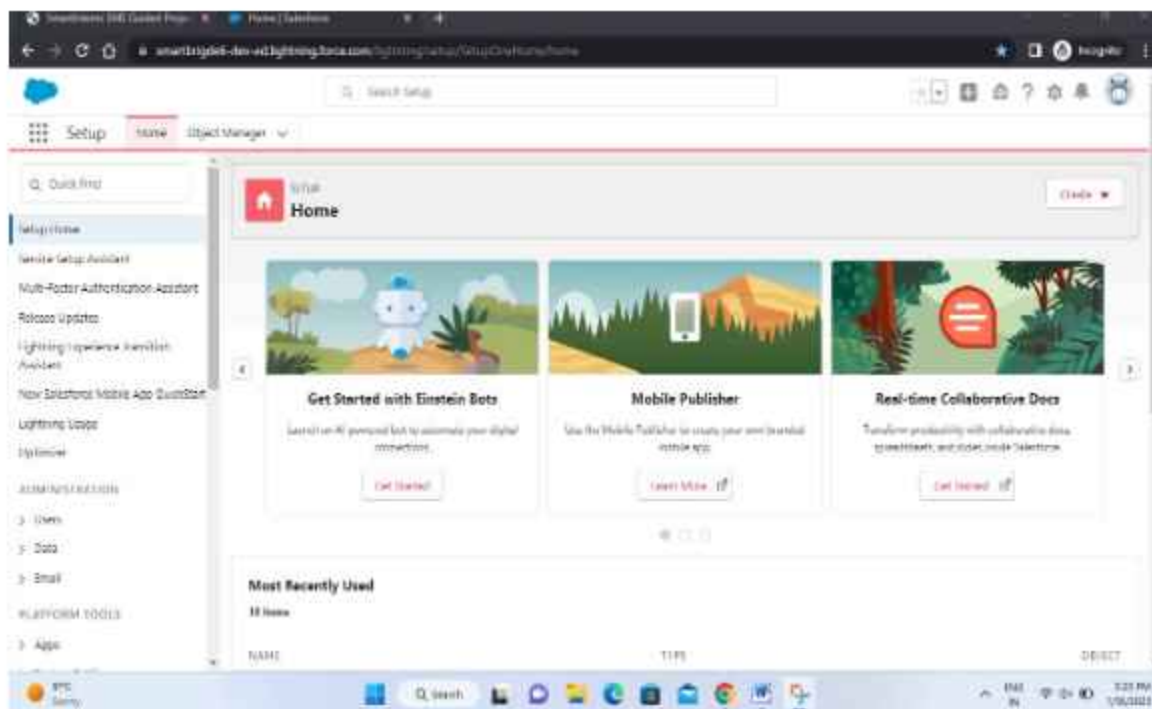
## Account Activation

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



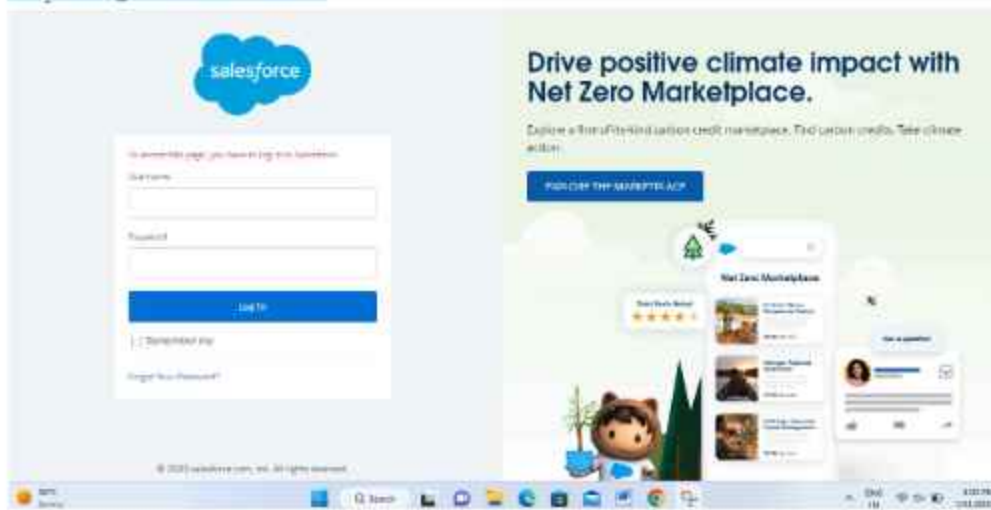
## Login To Your Salesforce Account

1. Go to [salesforce.com](https://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.

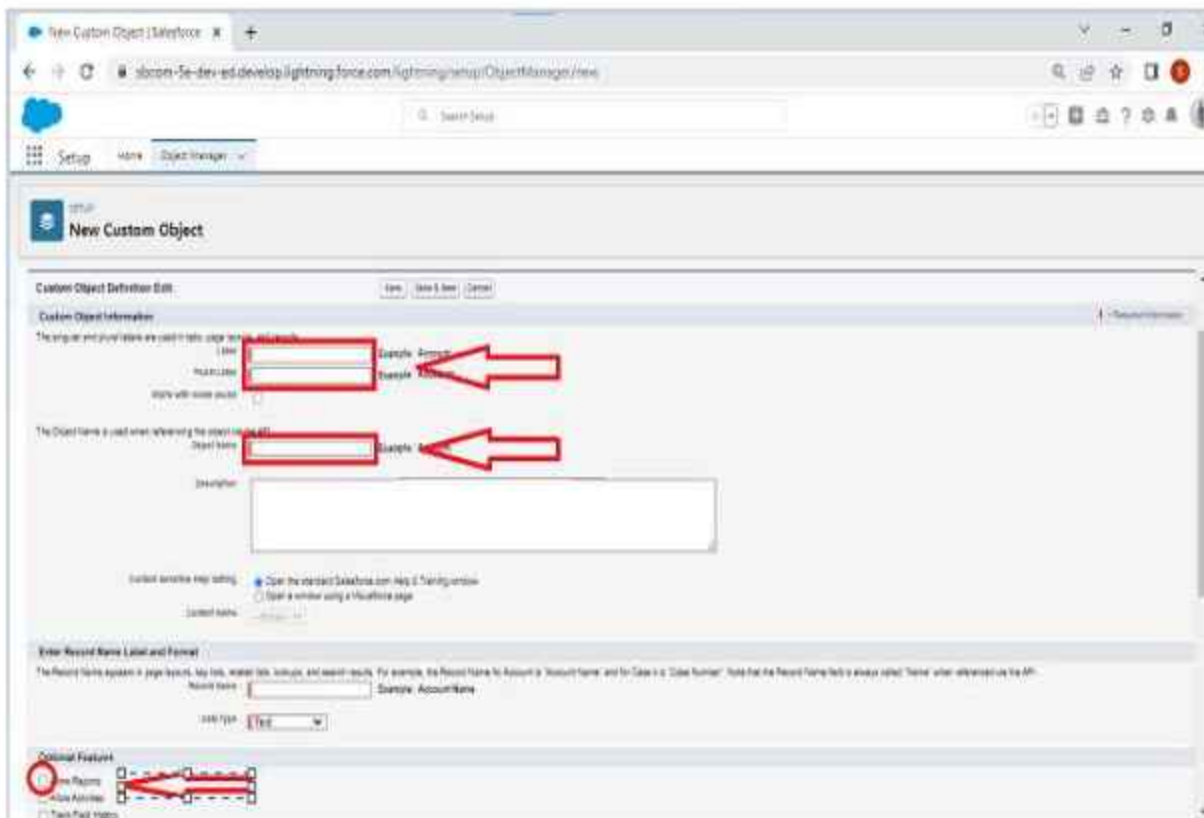
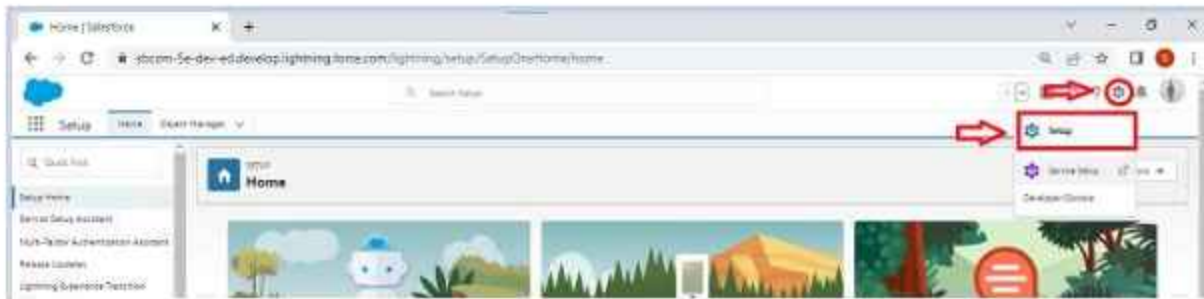
The below steps will assist you in creating those objects.

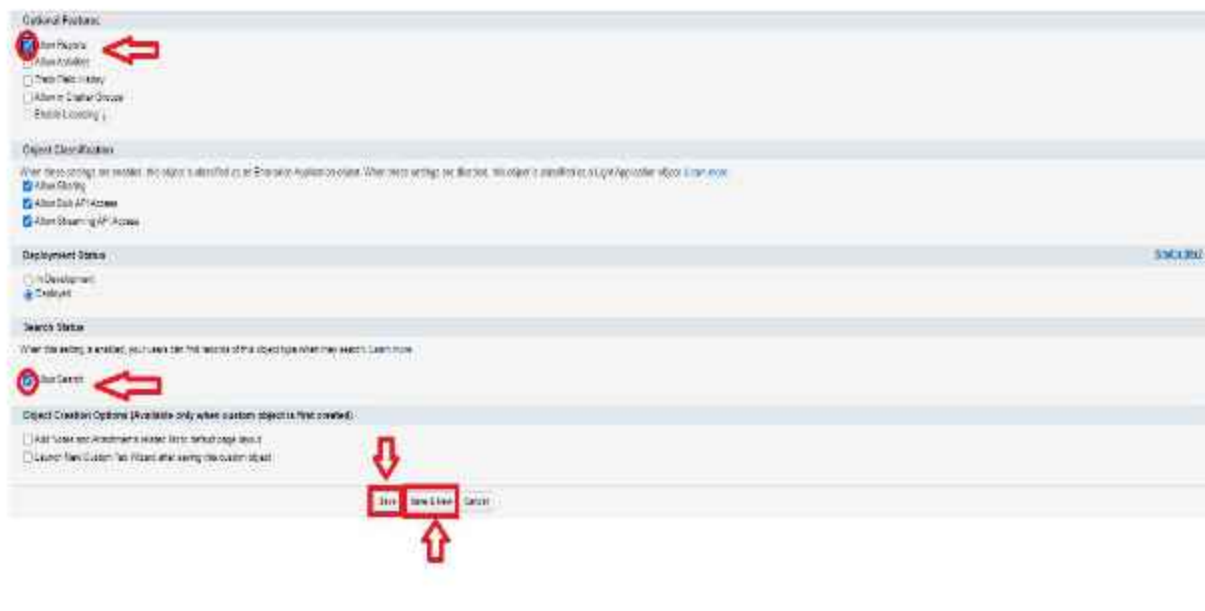
- Click on the gear icon and then select Setup.
- Click on the object manager tab just beside the home tab.
- After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
- Creation of Our Customer Object

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.





## 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:

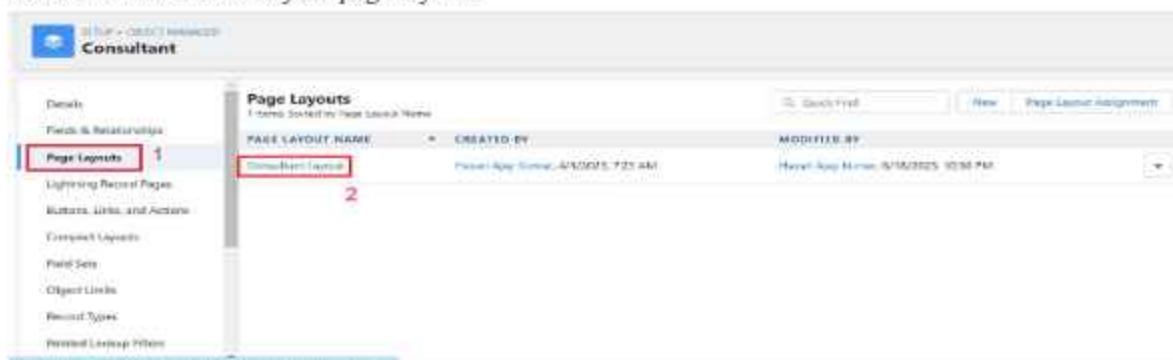
S No	Field Label	Data Type
1	Name	Text
2	Employee 1)Company Employee 2)Staff 3)Special Reference	Picklist
3	Coupon	Text
4	Products 1)Lipstick 2)Compact 3)EyeLiner 4)FacePack 5)Lip Balm 6)Nail Polish	Multi-Picklist

## 4. Page Layouts

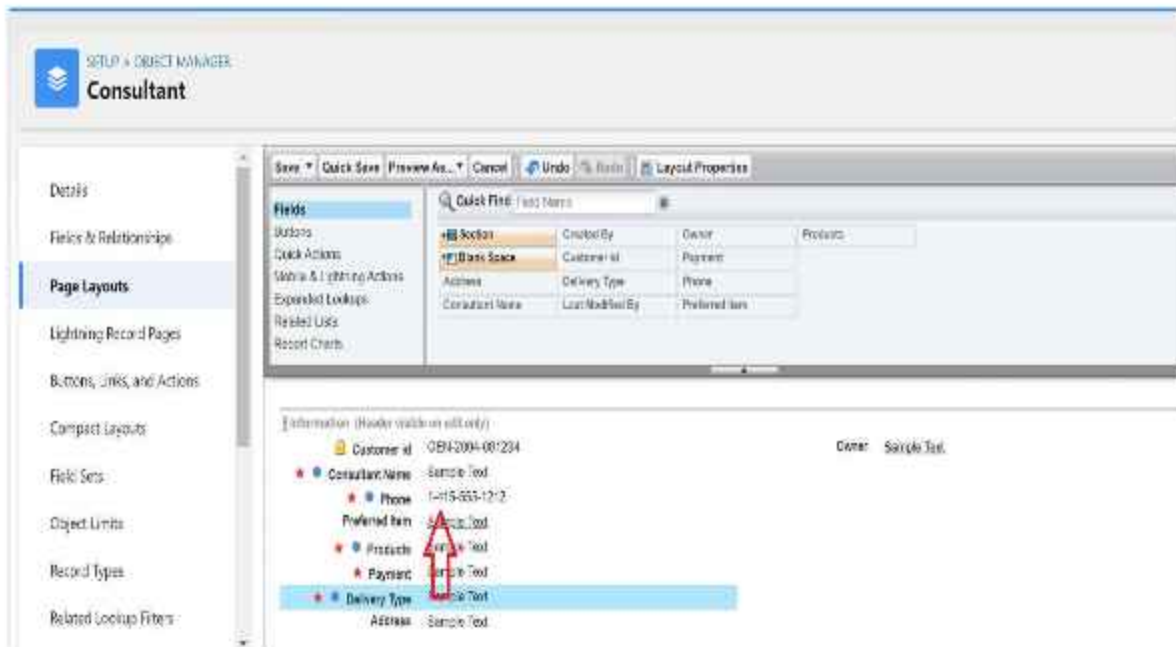
In Salesforce, page layouts define the organisation and arrangement of fields, buttons, related lists, and other components on an object's detail and edit pages. They allow you to control the user interface and tailor it to meet the specific needs of your organisation.

### Page Layout Creation

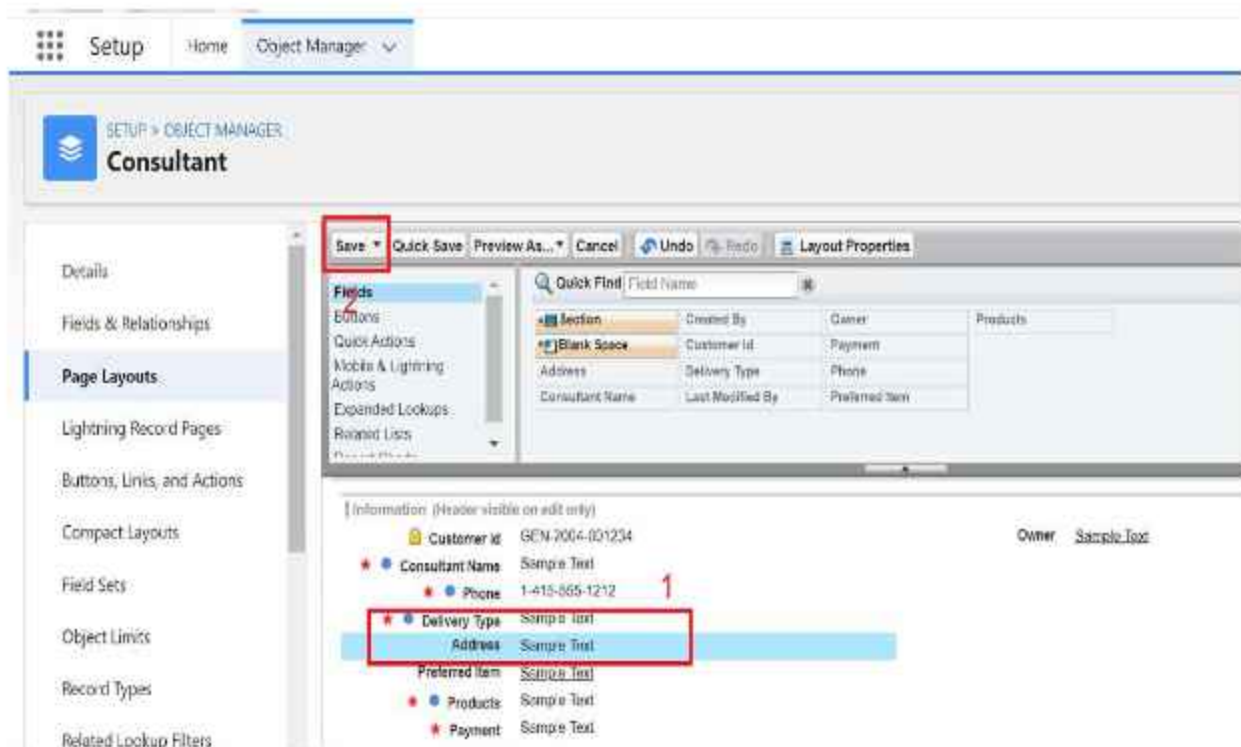
1. From the Salesforce setup menu, go to "Object Manager" and select the Consultants object.
2. Click on "Page Layouts" in the left sidebar. This will display a list of available page layouts for the selected object.
3. Select the Consultant Layout page layout.



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



5. Click on Save



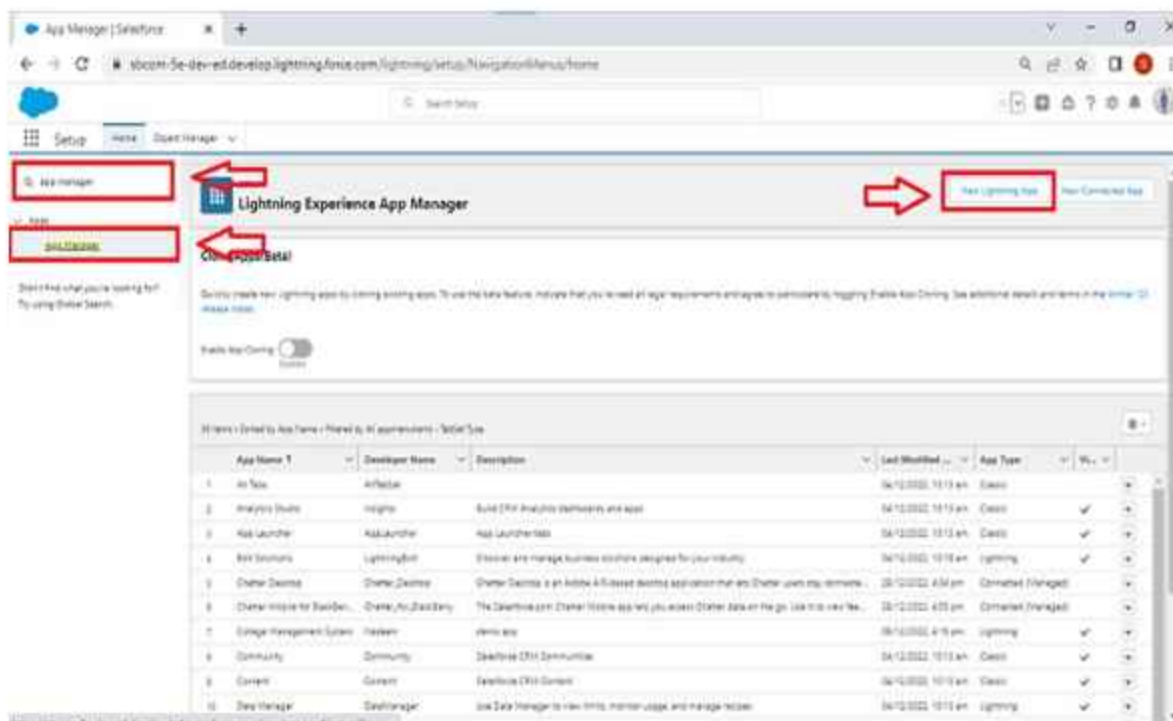
## 5.The Lightning App

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.

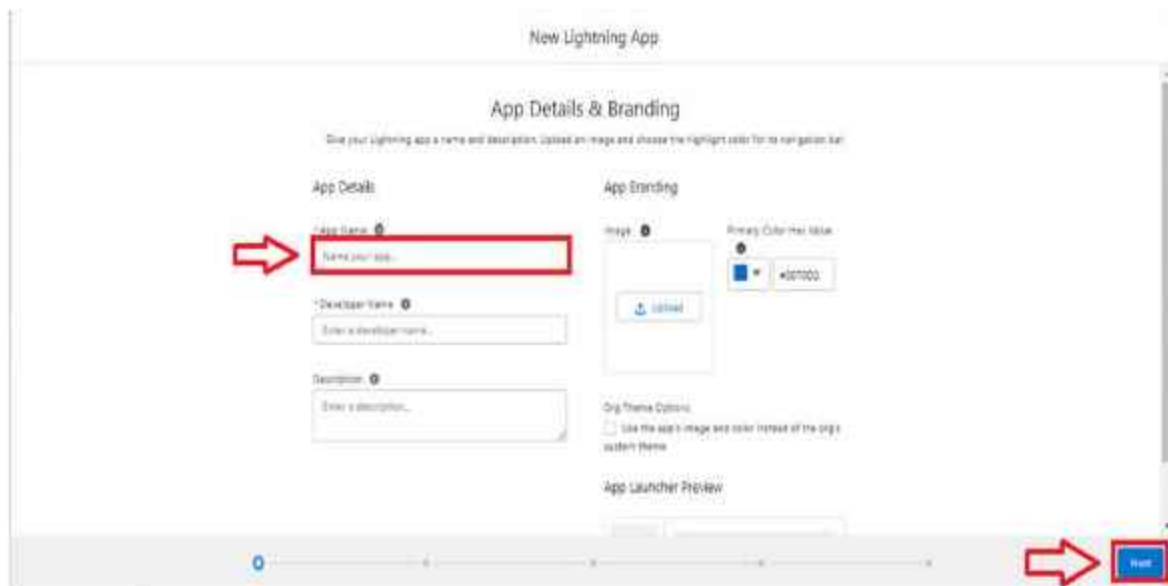
## Create a Lightning App

To create a lightning app page:

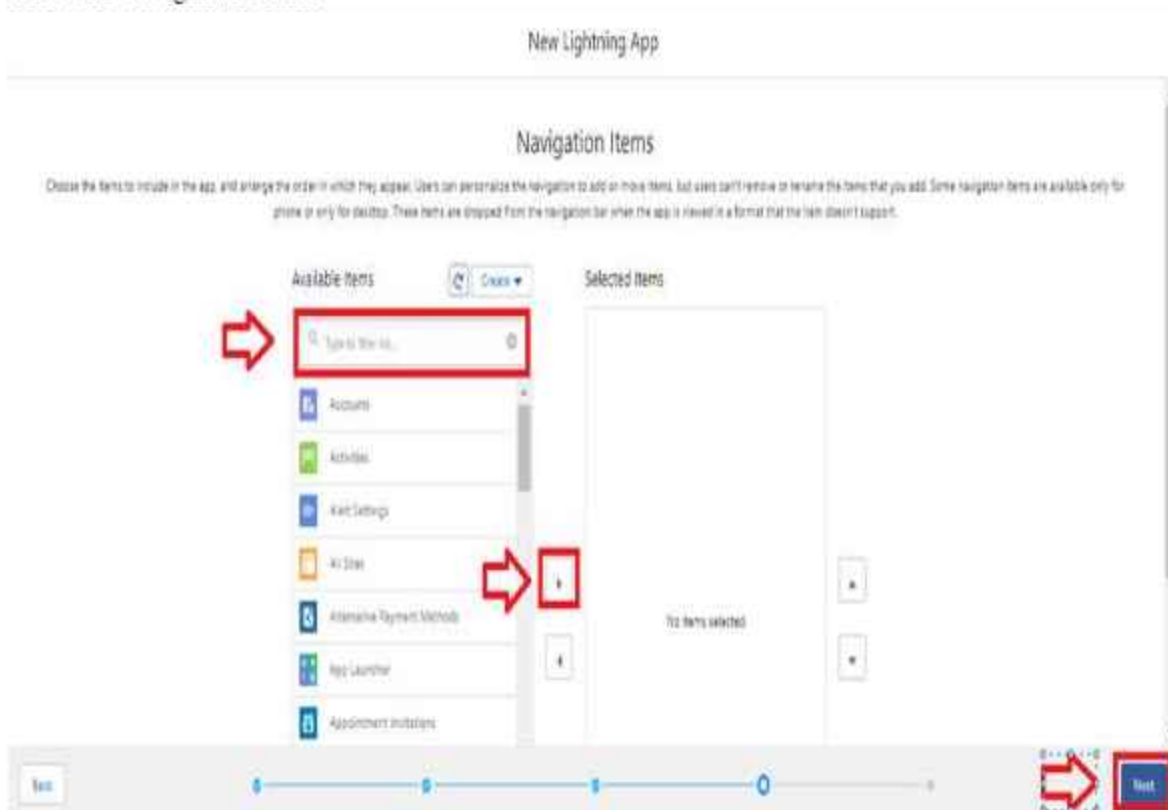
1.Go to setup page --> search "app manager" in quick find --> select "app manager" --> click on New lightning App.



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.



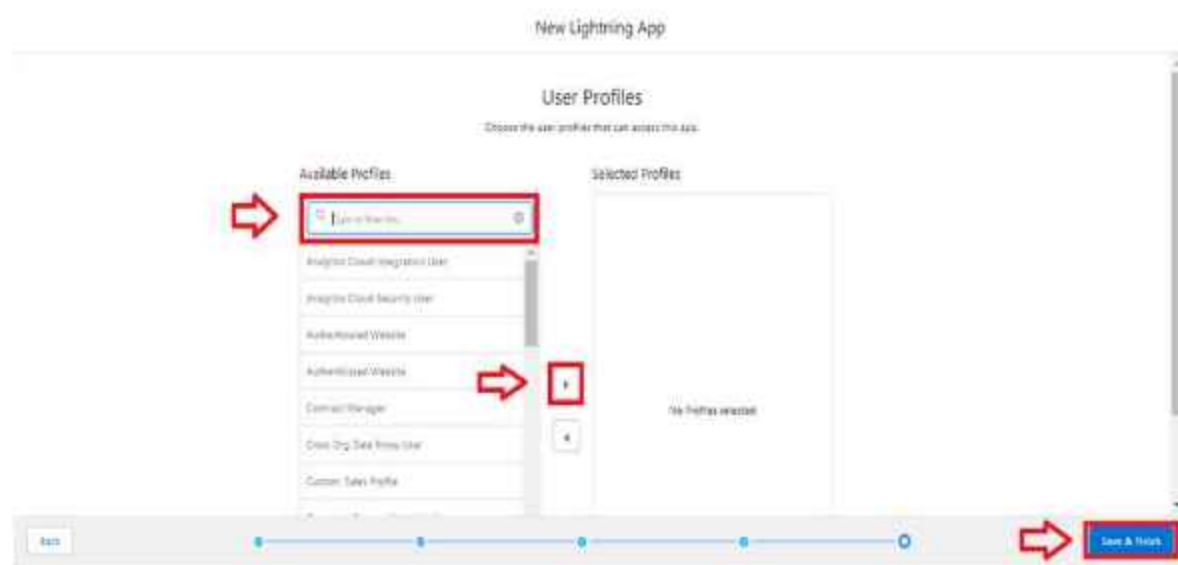
### 3.To Add Navigation Items:



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.

The screenshot shows the 'Clone Profile' form in the Salesforce Setup interface. The left sidebar contains a search bar with 'prof' and a 'Profiles' link. The main content area is titled 'Clone Profile' and includes a sub-header 'Enter the name of the new profile.' Below this, a message states 'You must select an existing profile to clone from.' A table lists existing profiles with columns for 'Existing Profile', 'Standard User', and 'Profile Name'. The 'Store Supervisor' profile is selected. At the bottom, there are 'Save' and 'Cancel' buttons.

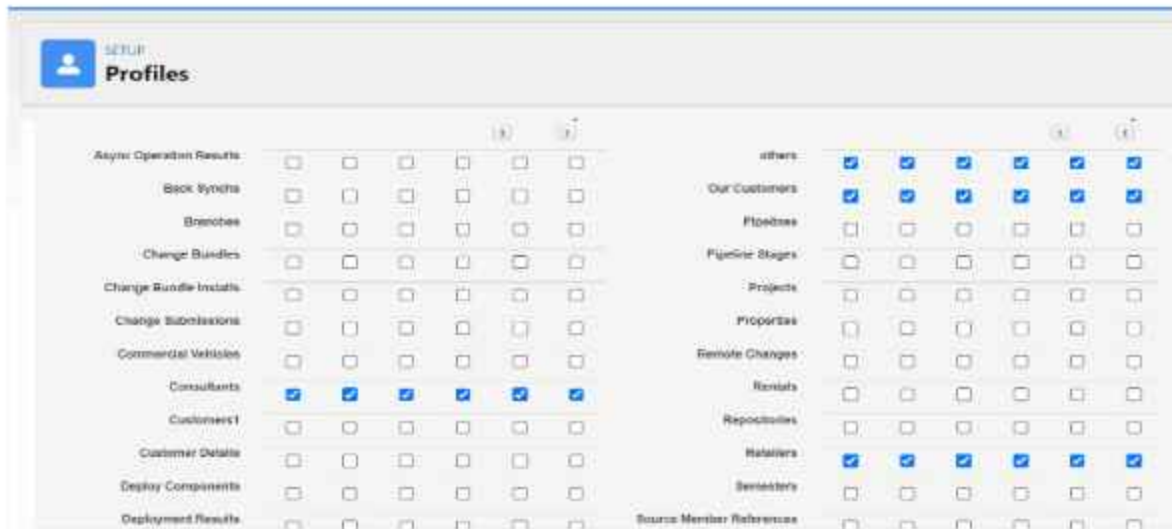
Existing Profile	Standard User	Profile Name
		Store Supervisor

2. While still on the profile page, then click Edit.

The screenshot shows the 'Profile Detail' page for the 'Store Supervisor' profile. The left sidebar is the same as the previous screenshot. The main content area is titled 'Profile: Store Supervisor' and includes a sub-header 'Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing the user's profile.' Below this, a message states 'If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record type available to users with this profile.' A table lists record types with columns for 'Record Type', 'Edit', 'Clone', 'Delete', and 'View Users'. The 'Store Supervisor' profile is selected. Below the table, there are 'Edit', 'Clone', 'Delete', and 'View Users' buttons. At the bottom, there are 'Service Provider Access' and 'Tab Settings' sections.

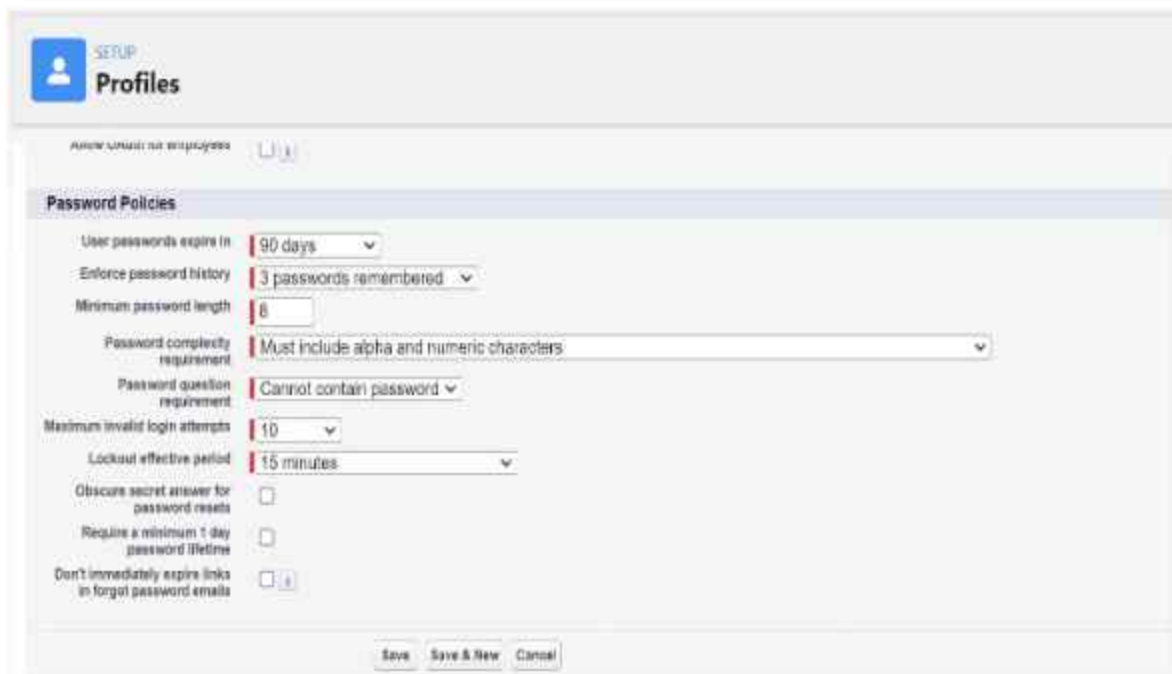
Record Type	Edit	Clone	Delete	View Users
Standard User				
Store Supervisor				

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



The screenshot shows the 'Profiles' setup page in Salesforce. The 'Custom Object' section is expanded, and the 'Consultants' object is selected. The 'Access' column for 'Consultants' is checked. The 'Others' object is also selected, and the 'Access' column for 'Others' is checked. The 'Our Customers' object is also selected, and the 'Access' column for 'Our Customers' is checked. The 'Retailers' object is also selected, and the 'Access' column for 'Retailers' is checked. The 'Source Member References' object is also selected, and the 'Access' column for 'Source Member References' is checked.

Object	View	Edit	Share	Access
Account	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Account History	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Branches	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Change Bundles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Change Bundle Install	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Change Subscriptions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Commercial Vehicles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Consultants	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Customers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer Details	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Deploy Components	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Deployment Results	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Others	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Our Customers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Pipeline	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pipeline Stages	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Properties	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Remote Changes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rentals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Repositories	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Retailers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Service Center	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Source Member References	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



The screenshot shows the 'Password Policies' setup page in Salesforce. The 'Password Policies' section is expanded, and the 'Password Policies' sub-section is selected. The 'User passwords expire in' is set to '90 days'. The 'Enforce password history' is set to '3 passwords remembered'. The 'Minimum password length' is set to '8'. The 'Password complexity requirement' is set to 'Must include alpha and numeric characters'. The 'Password question requirement' is set to 'Cannot contain password'. The 'Maximum invalid login attempts' is set to '10'. The 'Lockout effective period' is set to '15 minutes'. The 'Obscure secret answer for password resets' is unchecked. The 'Require a minimum 1 day password lifetime' is unchecked. The 'Don't immediately expire links in forgot password emails' is unchecked.

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

4. Click on Save.

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

Setup Profiles

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile: Standard Platform User

User License: Salesforce Platform

Profile Name: Billing Operator

Save Cancel

Setup Profiles

Profile Edit: Billing Operator

Set the permissions and page layouts for this profile.

Profile Edit

Name: Billing Operator

User License: Salesforce

Description:

Custom Profile: ☒

Save Save & New Cancel

Setup Profiles

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Lockout effective period: 15 minutes

Obscure secret answer for password resets: ☐

Require a minimum 1 day password lifetime: ☐

Don't immediately expire links in forgot password emails: ☐

Save Save & New Cancel

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

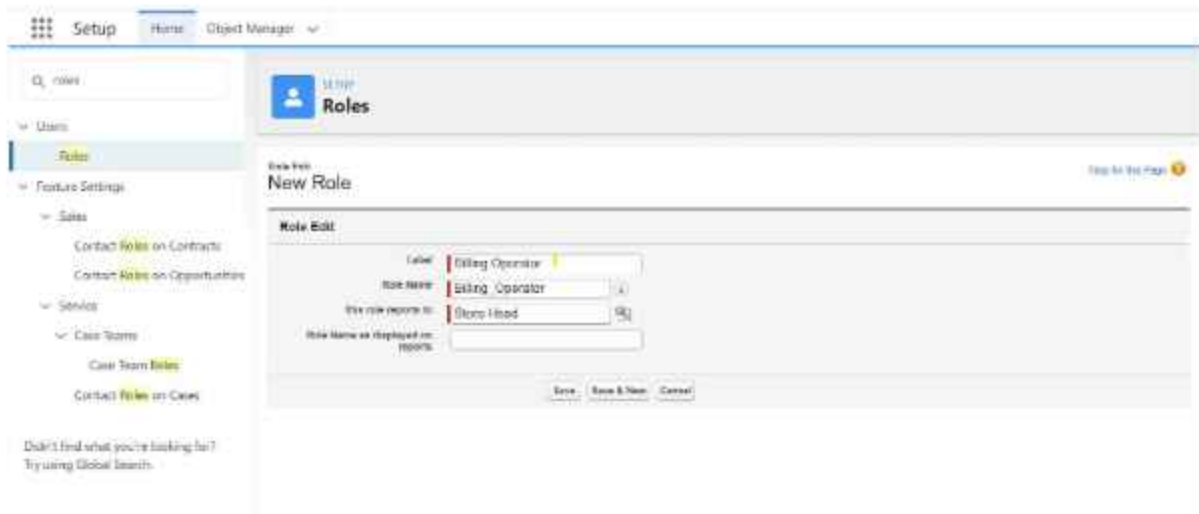
1. Click on the Gear Icon
2. Click "Setup"
3. In the Quick Find box, enter "Roles"
4. Click "Roles"
5. Click on "Set Up Roles"
6. Click "Expand All"
7. Under the CEO, click on "Add Role"
8. Fill up the Label as Store Head, Role Name Store\_Head,
9. Enter a Role name that will be displayed on Reports
10. Click on Save .

Similarly create One Roles under Store Head as Billing Operator.

The screenshot displays the Salesforce Setup interface for creating a new role. The left sidebar shows the navigation menu with 'Setup' selected, and 'Roles' highlighted under the 'Users' section. The main content area is titled 'Roles' and shows the 'New Role' form. The form fields are as follows:

Role Edit	
Label	<input type="text" value="Store Head"/>
Role Name	<input type="text" value="Store_Head"/>
This role reports to	<input type="text" value="thesmartbridge.com"/>
Role Name as displayed on reports	<input type="text"/>

At the bottom right of the form, there are three buttons: 'Save', 'Save & New', and 'Cancel'.



## Your Organization's Role Hierarchy

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



## 8. Users

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

### Creating a Users:

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 screenshot shows the 'User Edit' page in Salesforce. The left sidebar contains a navigation menu with options like 'Users', 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', 'Feature Settings', 'Data.com', 'Prospector Users', and 'Process Automation'. The main content area is titled 'Users' and 'User Edit'. It includes a 'General Information' section with fields for First Name (Amit), Last Name (S), Alias (as), Email (amit.s@gmail.com), Username (amit.s123@salesforce.com), Nickname (User16716132321371713), Title (Store Supervisor), Company, Department, and Device. There are also dropdown menus for Role (Store Head), User License (Salesforce), Profile (Store Supervisor), and a checkbox for Active. A list of user types is shown on the right, including Standard User, Knowledge User, Flow User, Service Cloud User, etc.

The screenshot shows the 'User Edit' page in Salesforce, specifically the 'Single Sign On Information' and 'Locale Settings' sections. The 'Single Sign On Information' section has a 'Federation ID' field. The 'Locale Settings' section includes dropdown menus for Time Zone (Pacific Daylight Time (America/Los Angeles)), Locale (English (United States)), and Language (English). The 'Approver Settings' section has fields for Delegated Approver and Manager, a dropdown for Receive Approval Request Email (Only if I am an approver), and a checkbox for Generate new password and notify user immediately. At the bottom, there are buttons for Save, Save & New, and Cancel.

## 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.

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

The screenshot shows the Salesforce Setup interface for user management. The left sidebar contains the navigation menu with 'Users' selected. The main content area displays the 'Users' configuration page. The 'Single Sign-On Information' section includes a 'Federation ID' field. The 'Locale Settings' section shows 'Time Zone' set to '(GMT-07:00) Pacific Daylight Time (America/Los\_Angeles)', 'Locale' set to 'English (United States)', and 'Language' set to 'English'. The 'Approver Settings' section includes 'Designated Approver' and 'Manager' fields, and a 'Require Approval Request Details' dropdown set to 'Only if I am an approver'. At the bottom, there is a checkbox for 'Generate new password and notify user immediately' and buttons for 'Save', 'Save & New', and 'Cancel'.

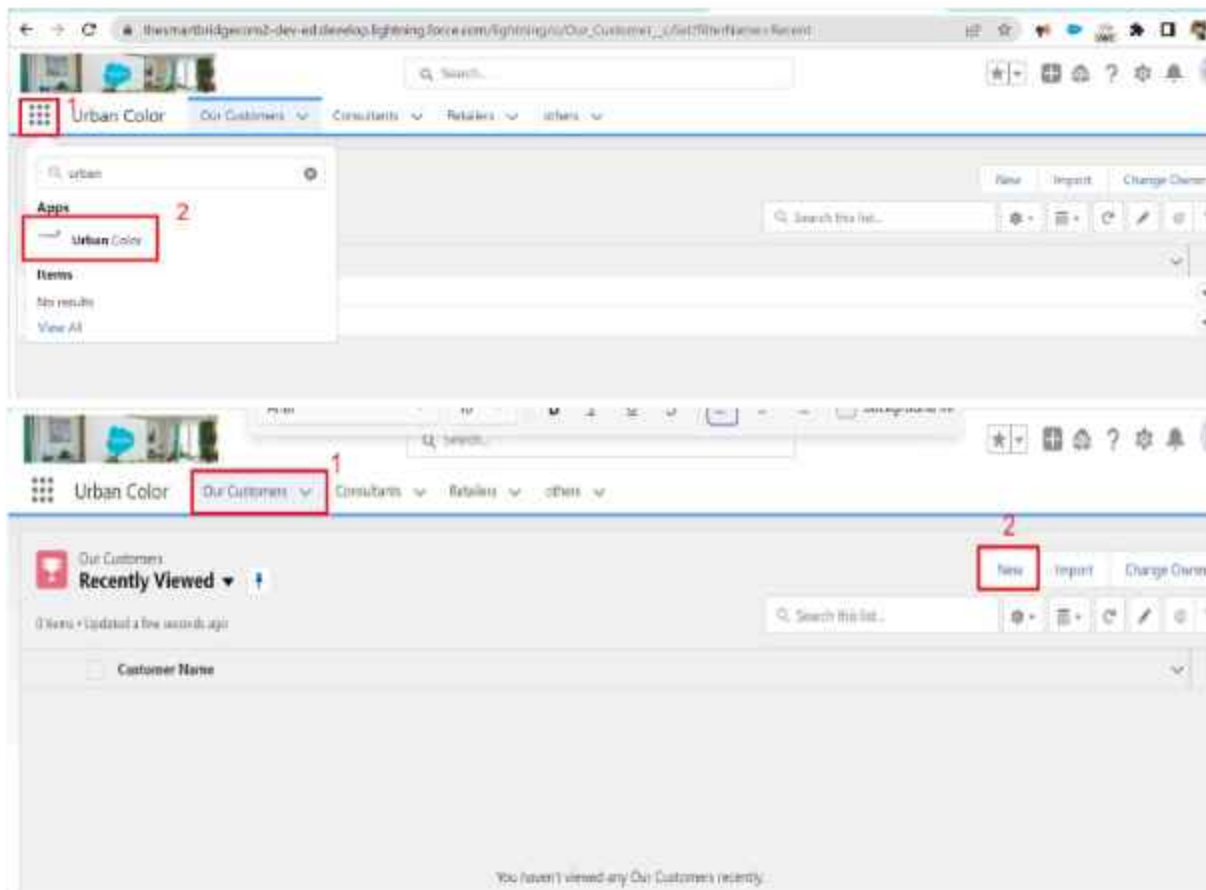


## 9. User Adoption

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

Cancel

Save & New

Save

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

Urban Color

Our Customers

Consultants

Retailers

Others

Our Customers

Recently Viewed

Search the list

Customer Name

1

Suresh

2

2

Kamal

Our Customer

Suresh

Related

Details

Customer Name

Suresh

Customer id

5

Phone

97583873728

Email id

suresh@gmail.com

Address

Hyderabad

Additional Information

Customer

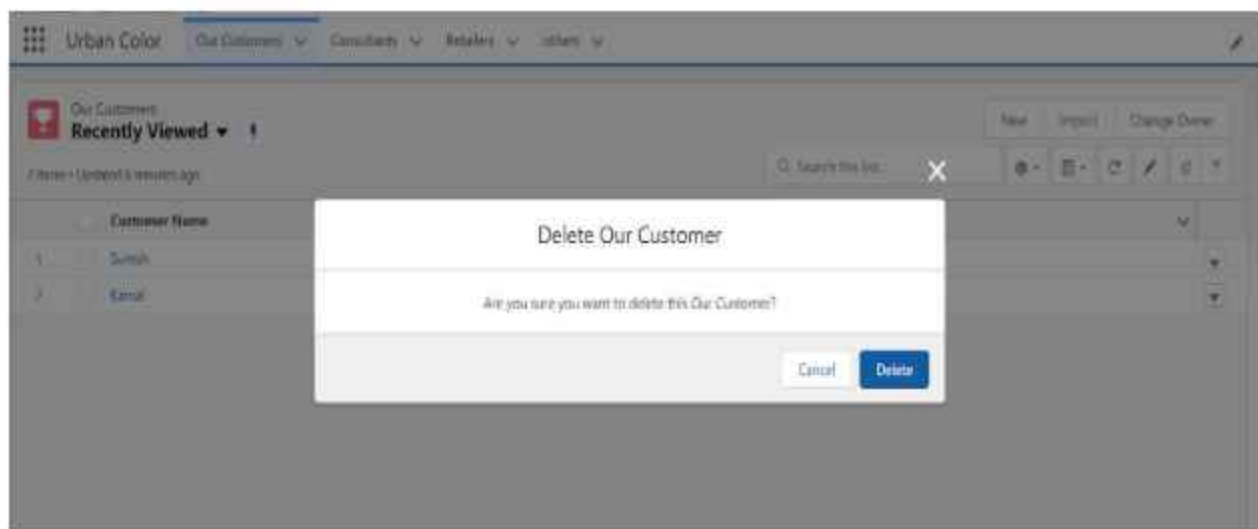
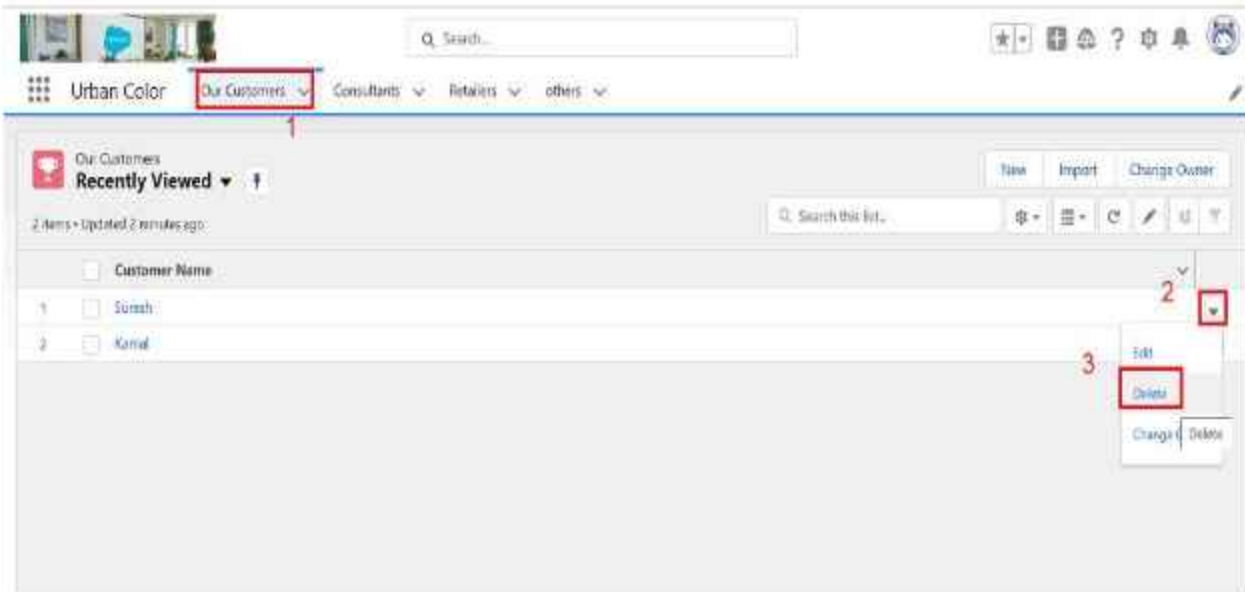
Owner

Hazari Ajay Kumar

# 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.



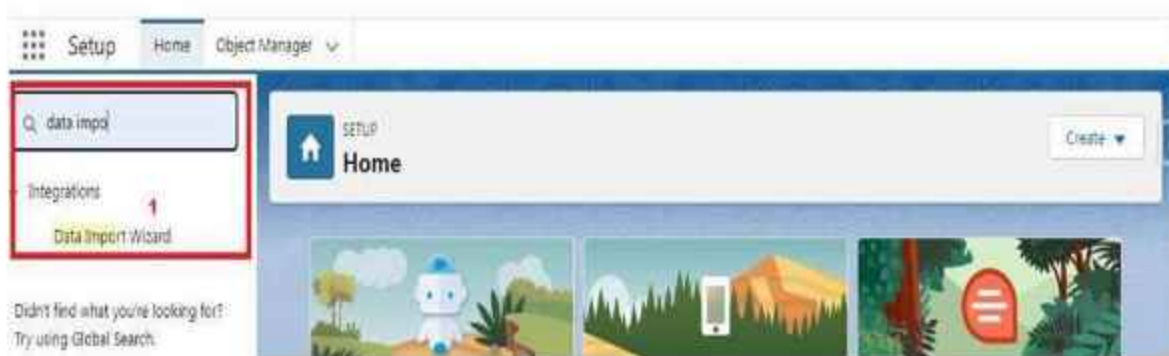
## 10.Import Data

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.

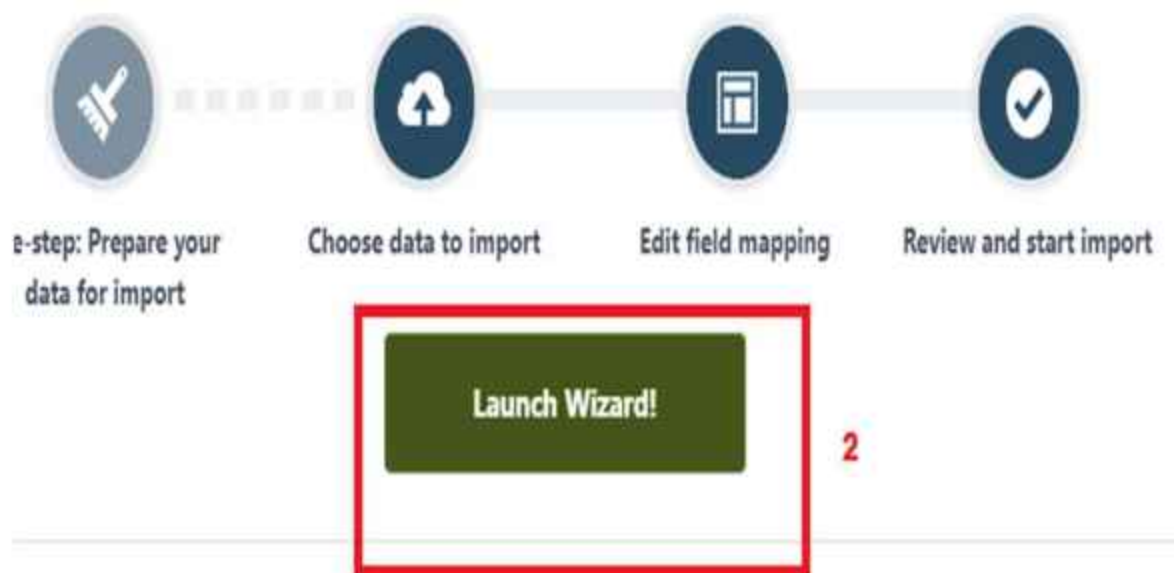
### To Import Data

1.From Setup, click the Home tab.

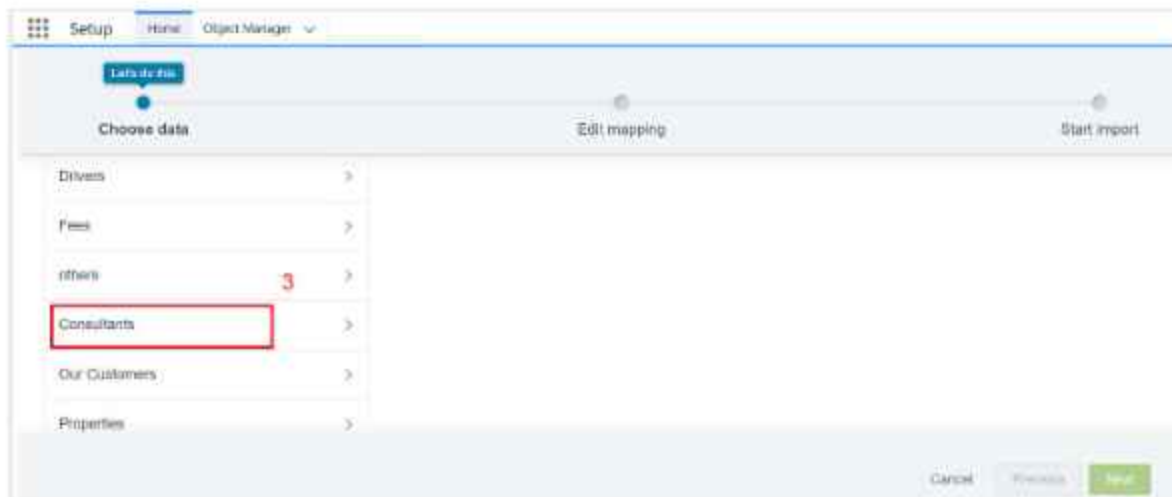
2.In the Quick Find box, enter Data Import and select Data Import Wizard



3.Click Launch Wizard!



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



5. Select Add new records.

## Import your Data into Salesforce

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

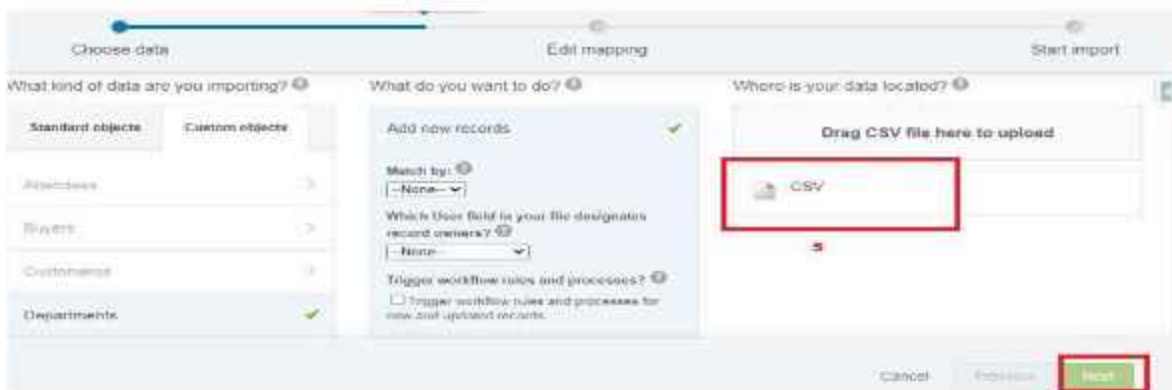
What kind of data are you importing? ⓘ

What do you want to do? ⓘ

Where is your data located? ⓘ



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.

Edit	Mapped Salesforce Object	CSV Header	Example 1	Example 2	Example 3
Change	Consultant Name	Consultant Name	John Doe	John	John
Change	Mobile Number	Mobile Number	9999999999	9999999999	9999999999
Change	Delivery Type	Delivery Type	Self Pickup	Curbside	Self Pickup
Change	Address	Address		1234567890	
Change	Products	Products	Laptop	Keyboard	Mouse Pad
Change	Payment	Payment	Cash	Card	Credit Card
Change	Email	Email	john.doe@gmail.com	john.doe@gmail.com	john.doe@gmail.com

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

**Review & Start Import**  
Review your import information and data (Start Import).

Your selections:

- Consultants ✓
- Add new records ✓
- Consultants - Insert Only ✓

Your import will include:

Mapped fields: 7

Your import will not include:

Unmapped fields: 0

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.





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

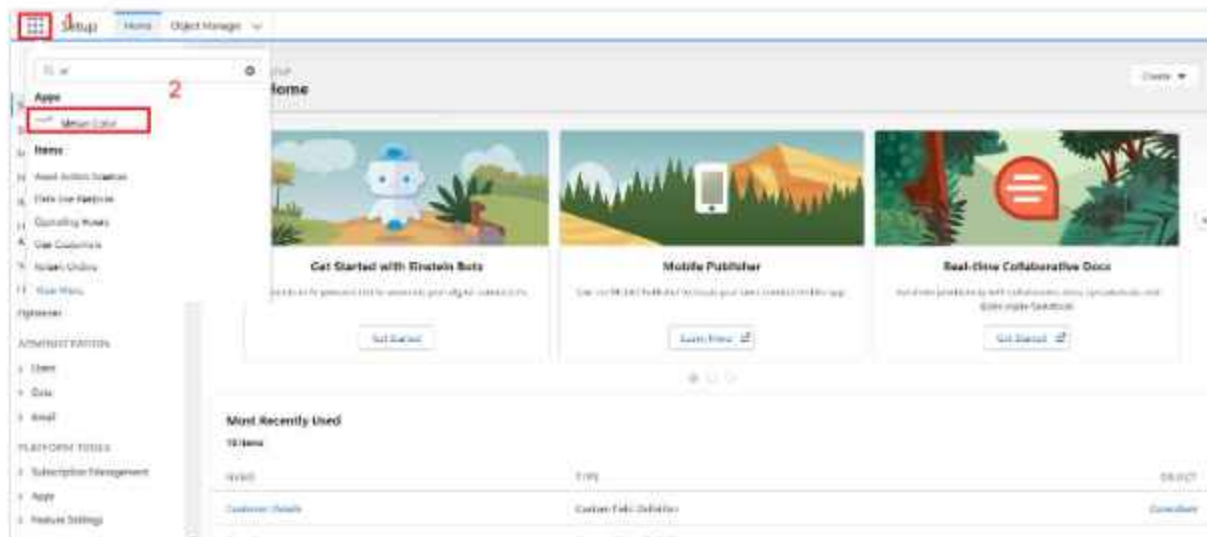
9.Click on Add Bucket and name it as NetBanking

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.







### Edit Bucket Column

\* Field: Payment X \* Bucket Name: Payment type

All Values (4)

Bucket Name

2

Unbucketed Values (4)

☐ Bucket remaining values as Other

Add Bucket

Move To

Search Values

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

Cancel Apply

### Edit Bucket Column

\* Field: Payment X \* Bucket Name: Payment type

All Values (4)

Net Banking (0)

Cash (0)

Unbucketed Values (4)

☐ Bucket remaining values as Other

Add Bucket

Move To

Search Values

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

Cancel Apply

## Edit Bucket Column



\* Field



Payment X

\* Bucket Name

Payment type

All Values (4)

Net Banking (0)  

Cash (0)  


Unbucketed Values (4)

☐ Bucket remaining values as Other

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	

Add Bucket

Move To 

## Edit Bucket Column



\* Field



Payment X

\* Bucket Name

Payment type

All Values (4)

Net Banking (0)  

Cash (0)  


Unbucketed Values (4)

☐ Bucket remaining values as Other

Search Values

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

Add Bucket

Move To 

Net Banking

Cash

Unbucketed Values

New Bucket

Cancel

Apply

## Edit Bucket Column

\*Field

Payment X

\*Bucket Name:

Payment type

All Values (4)

Net Banking (3) ✎ 🗑

Cash (0) ✎ 🗑

Unbucketed Values (1)

☐ Bucket remaining values as Other

Add Bucket

Search Values

VALUE	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	

Move To ▼

Cancel

Apply

## Edit Bucket Column

\*Field

Payment X

\*Bucket Name:

Payment type

All Values (4)

Net Banking (3) ✎ 🗑

Cash (1) ✎ 🗑

Unbucketed Values (0)

☐ Bucket remaining values as Other

Add Bucket

Search Values

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

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

Outline Filters

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

Groups

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

Consultant: Consultant Name	Delivery Type	Products	Payment	Payment type
Dev Raj	Self Pickup	Upstick	Cash	Cash
Ajith	Courier	Compact	Upi	Net Banking
Sabu	Self Pickup	Face Pack	Credit Card	Net Banking
Chitra	Courier	Eye Liner	Debit Card	Net Banking
Sayathi	Courier	Nail Polish	Upi	Net Banking
Parasit	Self Pickup	Eye Liner	Upi	Net Banking
Ajay Kumar	Courier	Lip Balm	Debit Card	Net Banking
Shankar	Self Pickup	Face Pack	Cash	Cash
Sandeep	Courier	Eye Liner	Upi	Net Banking

REPORT ▼  
New Consultants Report ✓ Consultants

Fields Outline Filters

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

Groups

- Payment type

Columns

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

Payment type	Consultant: Consultant Name	Delivery Type	Products	Payment
Net Banking (1)	Ajith	Courier	Compact	Upi
	Sabu	Self Pickup	Face Pack	Credit Card
	Chitra	Courier	Eye Liner	Debit Card
	Sayathi	Courier	Nail Polish	Upi
	Parasit	Self Pickup	Eye Liner	Upi
	Ajay Kumar	Courier	Lip Balm	Debit Card
	Sandeep	Courier	Eye Liner	Upi
Subtotal				
Cash (2)	Dev Raj	Self Pickup	Upstick	Cash
	Shankar	Self Pickup	Face Pack	Cash
Subtotal				
Total (3)				

Save Report

1

\*Report Name  
Consultants Report

Report Unique Name  
Consultants\_Report\_1234

Report Description

2

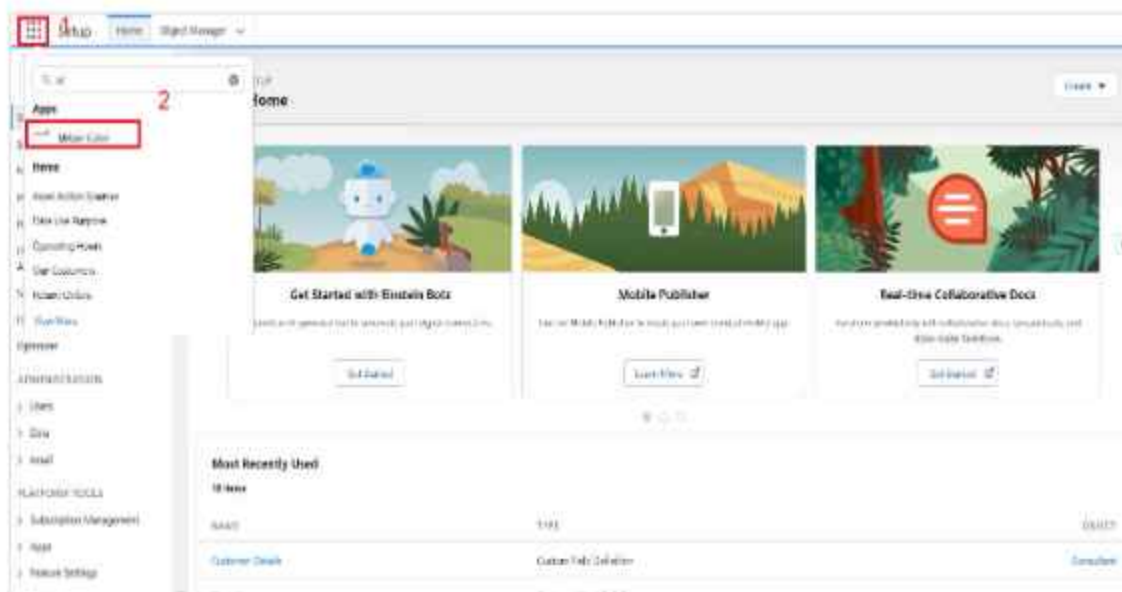
Private Reports

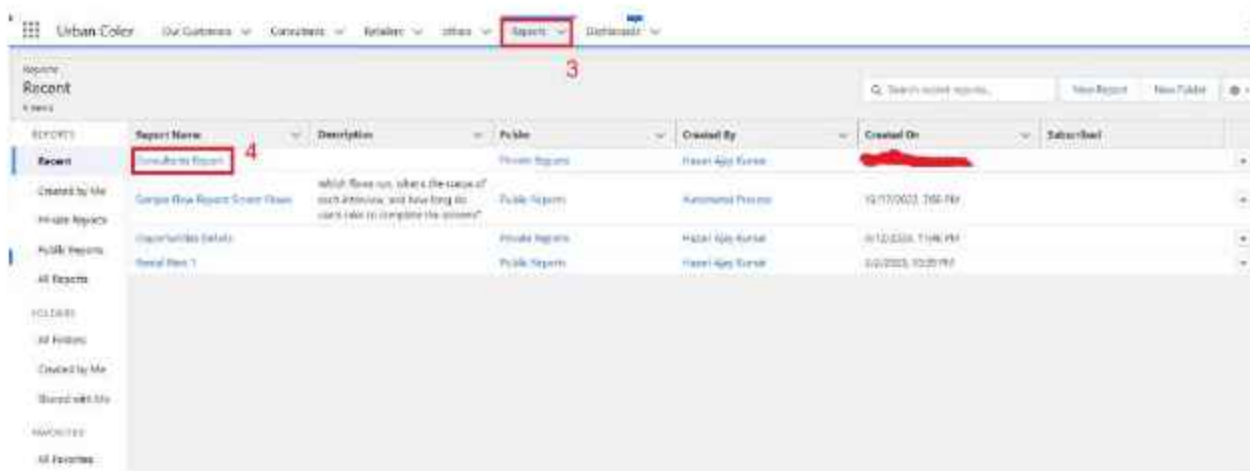
3

Cancel Save

## 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





## 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.



# New Dashboard

\* Name

Consultant Dashboard

Description


Folder

Private Dashboards

Select Folder

Cancel

Create





Urban Color

Our Customers

Consultants

Retailers

others

Reports

Dashboards

Consultant Dashboard

+ Component

+ / del

↶ ↷

⌵

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

Reports and Folders

Consultants Report

Hanan Ajay Kumar

Private Reports

Sample Flow Report - Screen Flow

Automated Process - Dec 17, 2022, 7:53 PM - Public Reports

Opportunities Details

Hanan Ajay Kumar - Apr 18, 2023, 12:02 AM - Private Reports

Personal File 1

Hanan Ajay Kumar - Feb 2, 2023, 10:43 PM - Public Reports

Cancel

Select



## Add Component

The 'Add Component' dialog box is shown with the following settings:

- Report: Consultants Report
- Use chart settings from report: ☐
- Display As: [Bar Chart icon] (highlighted with a red box and number 7)
- Payment type: [Text input]
- X-Axis: Record Count

The 'Preview' section shows a bar chart titled 'Consultants Report' with the following data:

Payment type	Record Count
Net Banking	7
Cash	2

The 'Add' button is highlighted with a red box and number 8.

The 'Consultant Dashboard' is shown with the 'Consultants Report' component added to the dashboard grid (highlighted with a red box and number 9).

## 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

