

# **URBAN COLOR MANAGEMENT SYSTEM**

*Empowering Colorful Cities*

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## **Abstract**

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

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

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

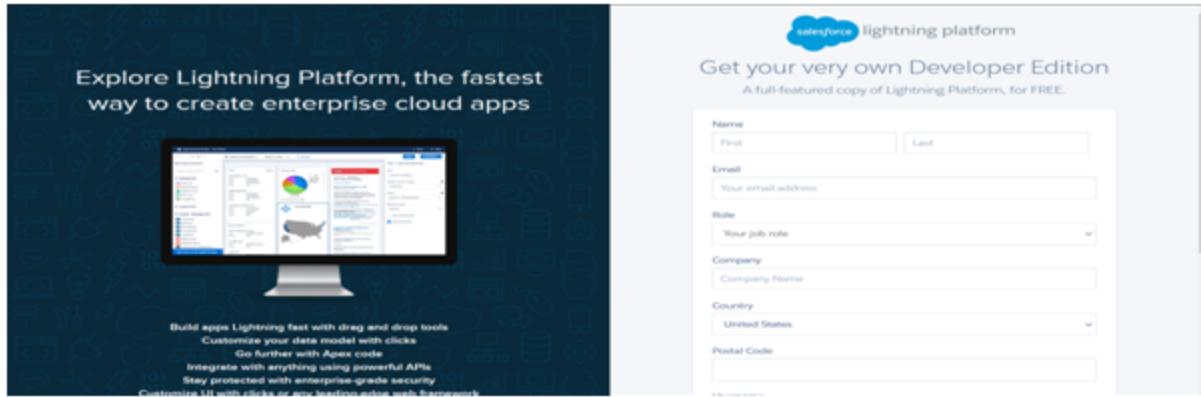
## **INDEX PAGE**

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# 1. Creating a Developer Account in Salesforce

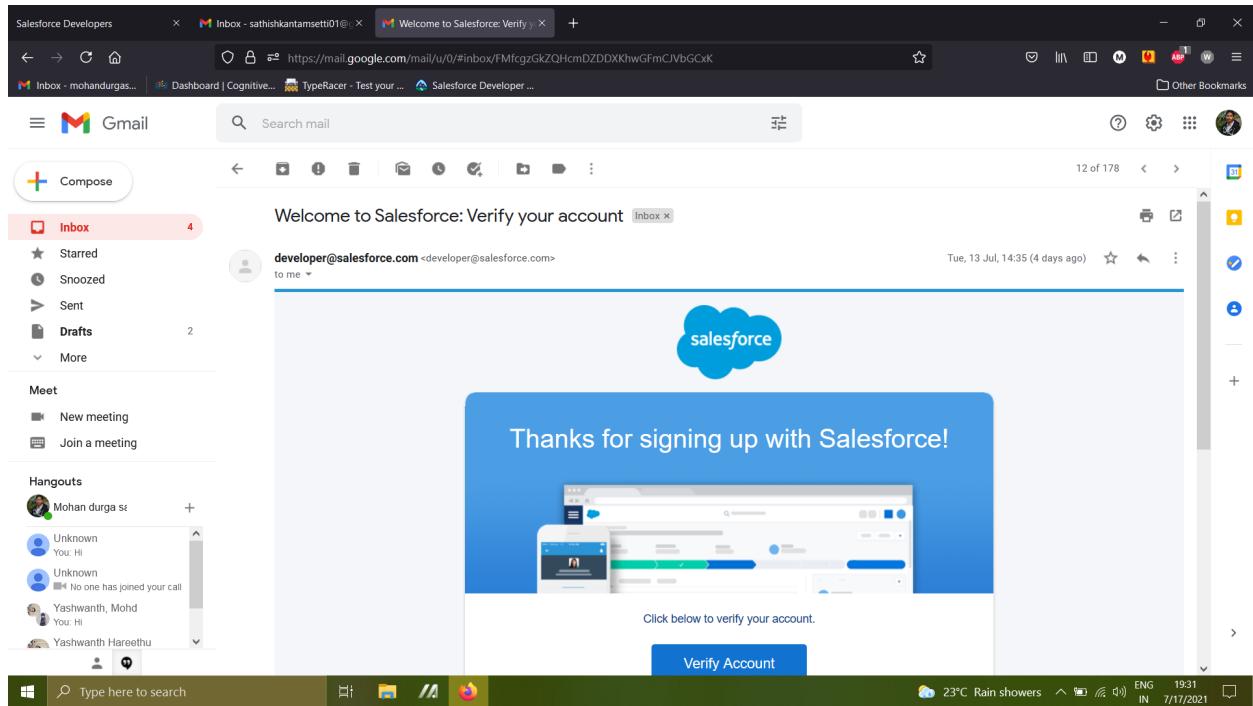
## Step 1: Sign Up for a Developer Org

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



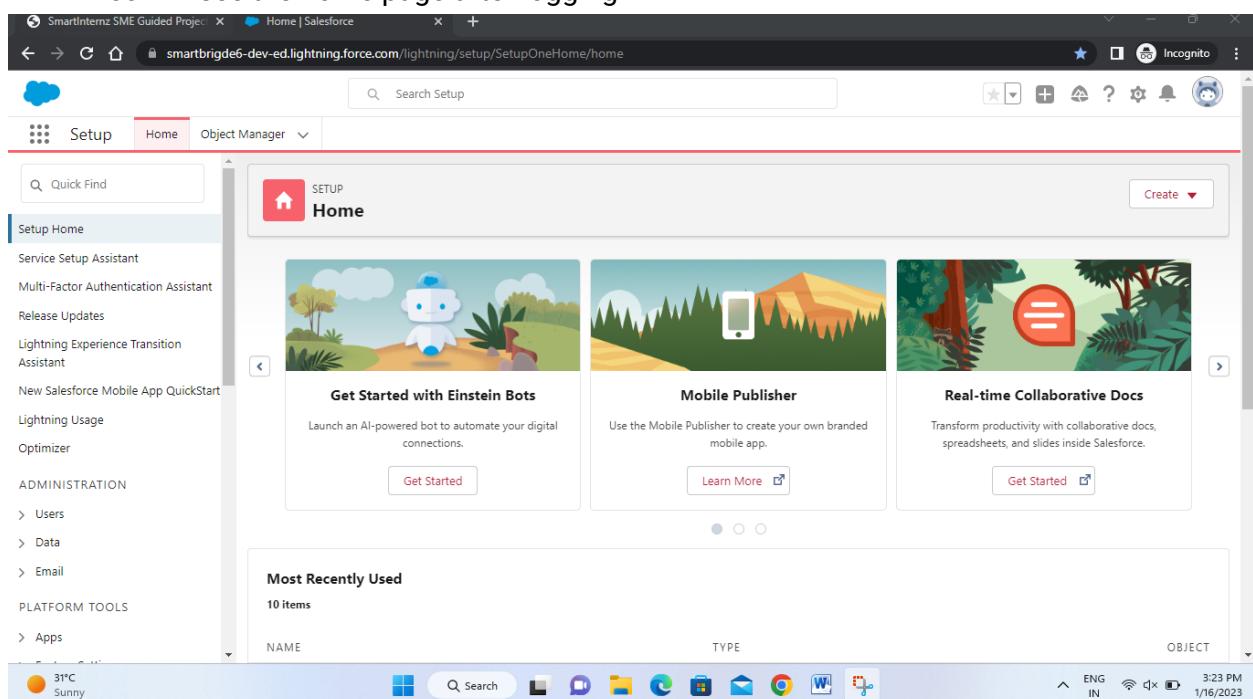
## Step 2: Account Activation

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



## Step 3: Login to Your Salesforce Account

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



## **2. Salesforce Objects**

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

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

### **2.1. Creating Objects for Urban Color Management**

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

#### **Step 1: Access Setup**

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

#### **Step 2: Open Object Manager**

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

#### **Step 3: Create a Custom Object**

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

#### **Step 4: Create "Our Customer" Object**

1. On the Custom Object Definition page, enter the following details:

- Label: Our Customer
- Plural Label: Our Customers

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

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

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

## **2.2.Creating the Consultants Object**

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

### **Step 1: Access Setup**

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

### **Step 2: Open Object Manager**

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

### **Step 3: Create a Custom Object**

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

## **Step 4: Create "Consultants" Object**

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

## **Step 5: Create a Custom Tab for "Consultants"**

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

## **2.3.Creating the Retailers Object**

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

### Step 1: Access Setup

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

### Step 2: Open Object Manager

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

### Step 3: Create a Custom Object

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

### **Step 4: Create "Retailers" Object**

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

### Step 5: Create a Custom Tab for "Retailers"

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

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

## **2.4.Creating the Others Object**

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

### Step 1: Access Setup

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

### Step 2: Open Object Manager

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

### **Step 3: Create a Custom Object**

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

### Step 4: Create "Others" Object

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

### Step 5: Create a Custom Tab for "Others"

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

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

### **3. Fields and Relationships**

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

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

#### **3.1.Fields in the "Our Customers" Object**

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

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

#### **3.2.Fields in Consultants objects**

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

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

### 3.3.Fields in Retailers objects

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

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

### 3.4.Fields in Others objects

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

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

## 4. Page Layouts

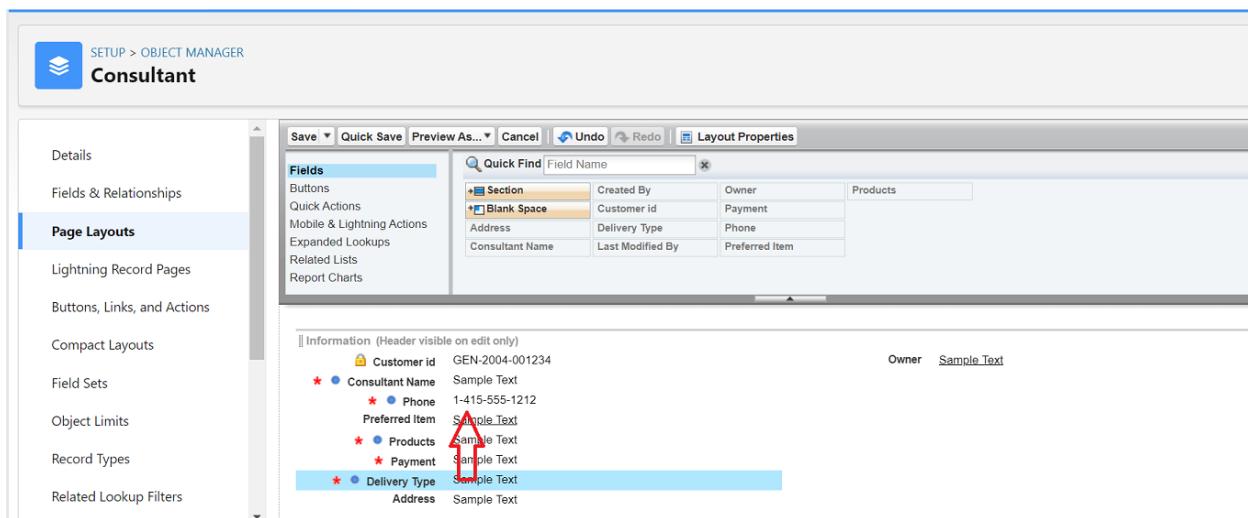
In Salesforce, page layouts define the organization and arrangement of fields, buttons, related lists, and other components on an object's detail and edit pages. They allow you to control the user interface and tailor it to meet the specific needs of your organization.

### Page Layout Creation

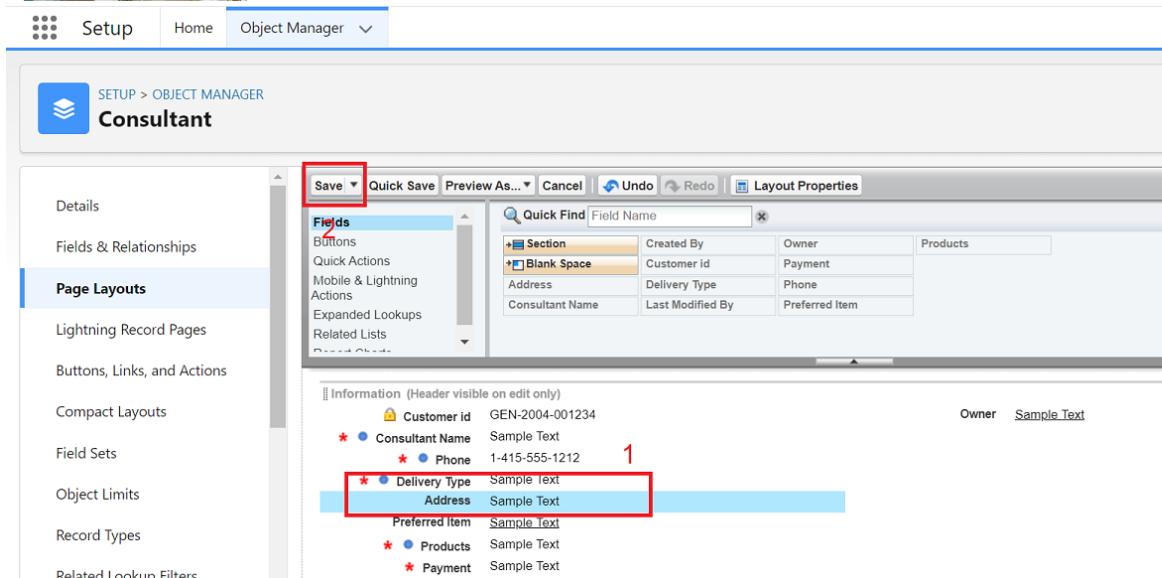
1. From the Salesforce setup menu, go to "**Object Manager**" and select the Consultants object.
2. Click on "**Page Layouts**" in the left sidebar. This will display a list of available page layouts for the selected object.
3. Select the **Consultant Layout** page layout

The screenshot shows the Salesforce Object Manager interface for the 'Consultant' object. The left sidebar has a 'Page Layouts' tab selected, indicated by a red box and the number '1'. The main area displays a table titled 'Page Layouts' with one item: 'Consultant Layout'. The table has columns for 'PAGE LAYOUT NAME', 'CREATED BY', and 'MODIFIED BY'. The 'Consultant Layout' row shows 'Hazari Ajay Kumar, 4/1/2023, 7:25 AM' in the created by column and 'Hazari Ajay Kumar, 6/18/2023, 10:30 PM' in the modified by column. A red box highlights the 'Consultant Layout' entry, and the number '2' is placed below it. The URL at the bottom of the screen is 'thesmarbridgecom2-dev-ed.develop.lightning.force.com/lightning/\_view'.

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

### **5.1.Create a Lightning App**

To create a Lightning app page:

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

The screenshot shows the Salesforce App Manager interface. At the top, there's a search bar with 'app manager' typed in. Below it, a navigation menu has 'Setup' selected. A red arrow points to the 'Cloud Apps(Beta)' link under the 'Apps' section. Another red arrow points to the 'New Lightning App' button at the top right. The main area displays a table of 35 items, sorted by app name, with columns for App Name, Developer Name, Description, Last Modified, App Type, and Version. The table includes rows for various standard and custom apps like 'All Tabs', 'Analytics Studio', 'App Launcher', etc.

### To Add Navigation Items:

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

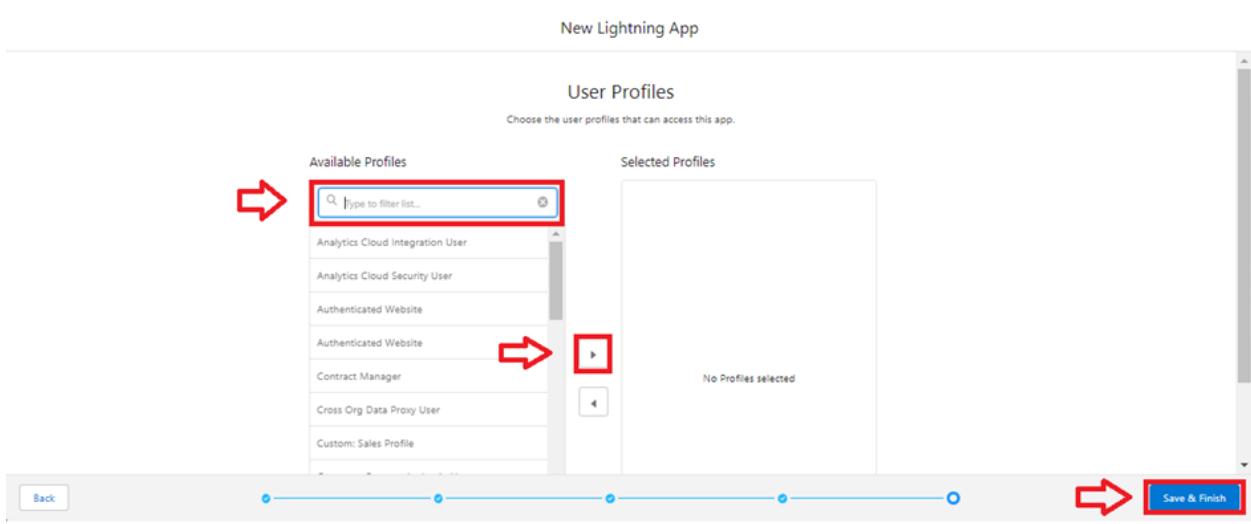
This screenshot shows the 'New Lightning App' configuration screen. The title 'New Lightning App' is at the top. Below it, the section 'Navigation Items' is described with a note: 'Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.' On the left, a list of 'Available Items' is shown with a search bar and a 'Create' button. A red arrow points to the search bar. To the right, a list of 'Selected Items' is shown with a 'No items selected' message. A red arrow points to the right arrow between the available and selected lists. At the bottom, a progress bar shows steps 1 through 5, with step 2 highlighted. A red arrow points to the 'Next' button at the far right.

### To Add User Profiles:

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

2. Click on the arrow button to add the profile.

3. Click **Save & Finish**.



## 6. Profile

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

### 6.1. Creating a Profile

#### Creating a Store Supervisor Profile and Setting Object Permissions:

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

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar contains 'prof'. The left sidebar has 'Users' expanded, with 'Profiles' selected. A message says 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Profiles' with a 'Clone Profile' sub-section. It prompts 'Enter the name of the new profile.' Below is a note 'You must select an existing profile to clone from.' with a required information indicator (red exclamation mark). It lists 'Existing Profile: Standard User', 'User License: Salesforce', and 'Profile Name: Store Supervisor'. At the bottom are 'Save' and 'Cancel' buttons.

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

Profile  
Store Supervisor

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing the profile.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges \[0\]](#) | [Enabled Apex Class Access \[703\]](#) | [Enabled Visualforce Page Access \[1\]](#) | [Enabled External Data Source Access \[0\]](#)  
[Enabled External Credential Principal Access \[0\]](#) | [Enabled Custom Metadata Type Access \[0\]](#) | [Enabled Custom Setting Definitions Access \[0\]](#)  
[Enabled Service Presence Status Access \[0\]](#) | [Enabled Custom Permissions \[0\]](#)

Profile Detail	
Name	Store Supervisor
User License	Salesforce
Description	

[Edit](#) [Clone](#) [Delete](#) [View Users](#)

(standard__LightningUI)	(standard__Chatter)
Community (standard__Community)	Salesforce Scheduler Setup (standard__LightningScheduler) Sample Console (standard__ServiceConsole) Service (standard__Service)
Content (standard__Content)	Service Console (standard__LightningService) Site.com (standard__Sites)
Data Manager (standard__DataManager)	Subscription Management (standard__RevenueCloudConsole)
Digital Experiences (standard__SalesforceCMS)	Urban Color (Urban_Color) Vehicle Management (Vehicle_Management)
Lightning Usage App (standard__LightningInstrumentation)	WDC (standard__Work)
LWC LEARNINGS (LWC__LEARNINGS)	
Marketing (standard__Marketing)	
Queue Management (standard__QueueManagement)	
Rental Management (Rental_Management)	

[Service Provider Access](#)

[Tab Settings](#)

Override users' personal tab customizations

8. Scroll down to **Custom App Settings** and give access to **Urban Color**.

9. Click on **Save**.

### To Create a New Profile:

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

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

**9. Click on Save.**

**Similarly, Create an Operator Profile:**

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

**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**

Allow sharing for employees:  [i](#)

**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:  [i](#)

**Save** **Save & New** **Cancel**

3. Click on **Save**.

## 7. Setup Roles

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

### Setup Roles

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

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

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup' (selected), 'Home', and 'Object Manager'. A search bar contains 'roles'. The left sidebar is titled 'Users' and has a 'Roles' section selected, which is highlighted in blue. Other sections include 'Feature Settings', 'Sales' (with 'Contact Roles on Contracts' and 'Contact Roles on Opportunities'), and 'Service' (with 'Case Teams' and 'Case Team Roles'). The main content area is titled 'Role Edit' and 'New Role'. It contains fields for 'Label' (set to 'Store Head'), 'Role Name' (set to 'Store\_Head'), 'This role reports to' (set to 'thesmartbridge.com'), and 'Role Name as displayed on reports' (empty). At the bottom are 'Save', 'Save & New', and 'Cancel' buttons.

Setup Home Object Manager

roles

Users Roles Feature Settings

Sales Contact Roles on Contracts Contact Roles on Opportunities

Service Case Teams Case Team Roles Contact Roles on Cases

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

SETUP Roles

New Role

Role Edit

Label: Billing Operator

Role Name: Billing\_Operator

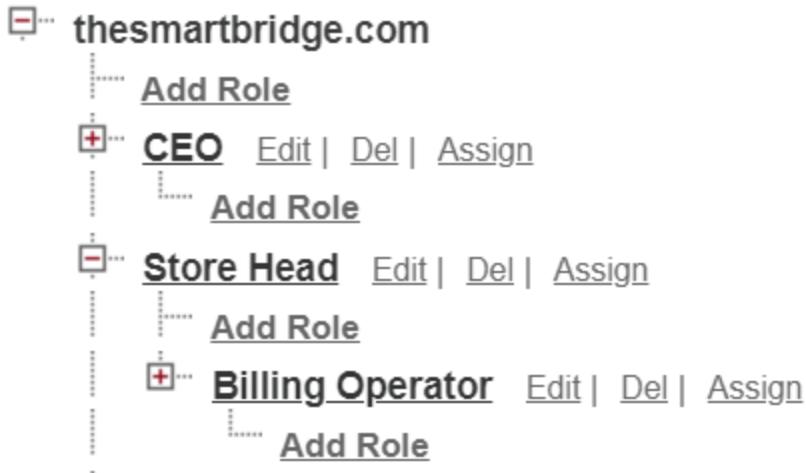
This role reports to: Store Head

Role Name as displayed on reports

Save Save & New Cancel

## Your Organization's Role Hierarchy

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



## 8. Users

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

### Creating a User:

1. From **Setup**, in the **Quick Find box**, enter **Users**, and then **select Users**.
2. Click **New User**.
3. Enter the user's name as **Amar K** and your email address, and create a unique username in the form of an email address. By default, the username is the same as the email address.
4. Select a **Role as Store Head**.
5. Select a **User License as Salesforce**.
6. Select a **Profile as Store Supervisor**.
7. Check **Generate new password** and notify the user immediately to have the user's login name and a temporary password emailed to your email.
8. Fill in the fields (First Name, Last Name, Alias, Email ID, Username, Nickname, Role, User License, Profile).
9. Click **Save**.

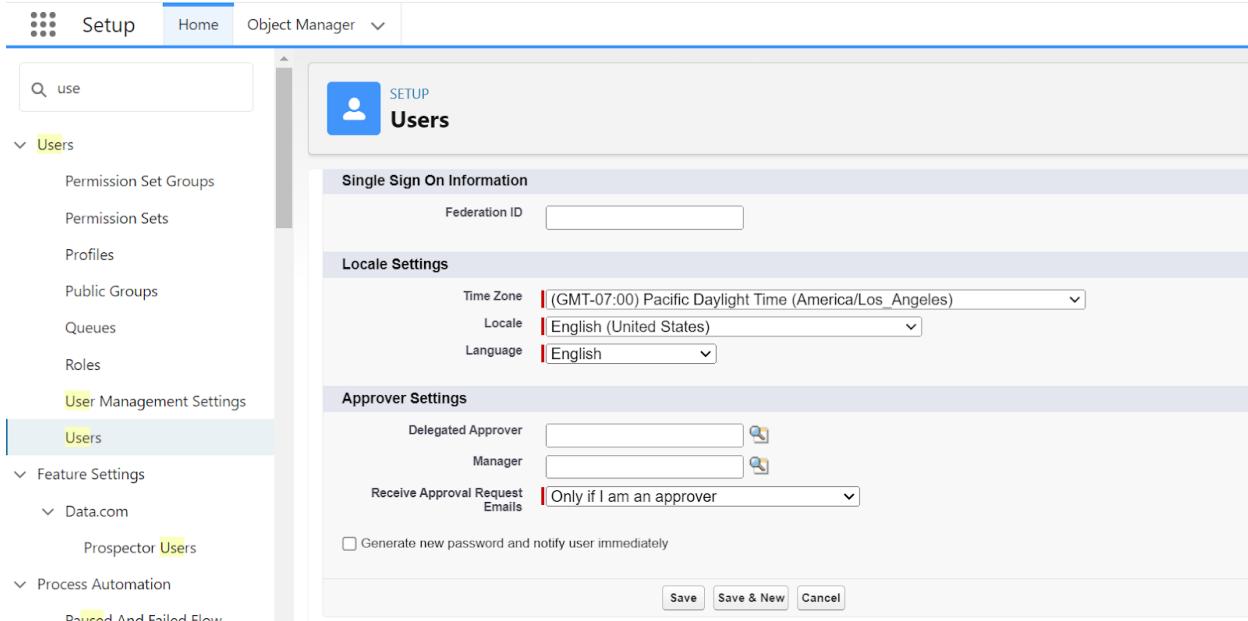
The screenshot shows the Salesforce Setup interface. The left sidebar is collapsed, and the main area displays the 'User Edit' screen under the 'SETUP' tab. The title bar says 'SETUP' and 'Users'. The 'General Information' section contains the following data:

Field	Value
First Name	Amar
Last Name	k
Alias	ak
Email	mailid@gmail.com
Username	amarlk2133@salesforce.com
Nickname	User167161323313747430
Title	Store Supervisor
Company	(empty)
Department	(empty)
Division	(empty)

On the right side, there are several checkboxes for roles and licenses, all of which are currently unchecked. The checked checkboxes are:

- Role: Store Head
- User License: Salesforce
- Profile: Store Supervisor
- Active: checked

At the bottom right of the 'General Information' section, there is a note: "I = Required Information".



## Second User Creation:

1. From **Setup**, in the **Quick Find box**, enter **Users**, and then **select Users**.
2. Click **New User**.
3. Enter the user's name as **John Teddy** and your email address, and create a unique username in the form of an email address. By default, the username is the same as the email address.
4. Select a **Role as Billing Operator**.
5. Select a **User License as Salesforce Platform**.
6. Select a **Profile as Billing Operator**.
7. Check **Generate new password and notify the user immediately** to have the user's login name and a temporary password emailed to your email.
8. Fill in the fields (First Name, Last Name, Alias, Email ID, Username, Nickname, Role, User License, Profile).
9. Click **Save**.

Setup Home Object Manager

Search Setup

User Edit

**General Information**

First Name	John	Role	Billing Operator
Last Name	Teddy	User License	Salesforce Platform
Alias	Jtedd	Profile	Billing Operator
Email	teddyjohn@gmail.com	Active	<input checked="" type="checkbox"/>
Username	johnteddy@salesforce.com	Marketing User	<input type="checkbox"/>
Nickname	User167160299867441831	Offline User	<input type="checkbox"/>
Title	Vehicle Manager	Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>

Data.com Monthly Addition Limit: 300

Accessibility Mode (Classic Only):

High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling:

Debug Mode:

Make Setup My Default Landing Page:

Required Information: ! = Required information

Save Save & New Cancel

Users

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

Setup Home Object Manager

Search Setup

User Edit

**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
<input type="checkbox"/> Generate new password and notify user immediately	

Save Save & New Cancel

Users

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

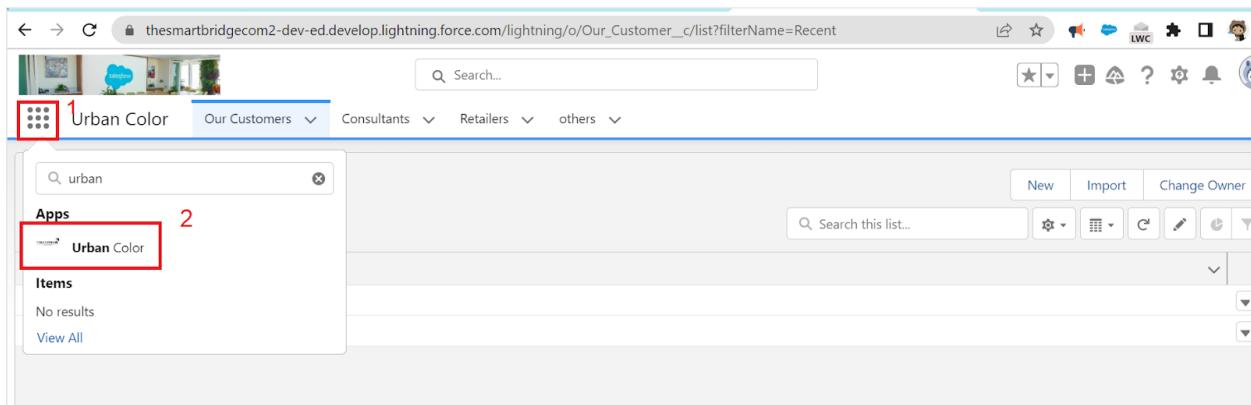
## 9. User Adoption

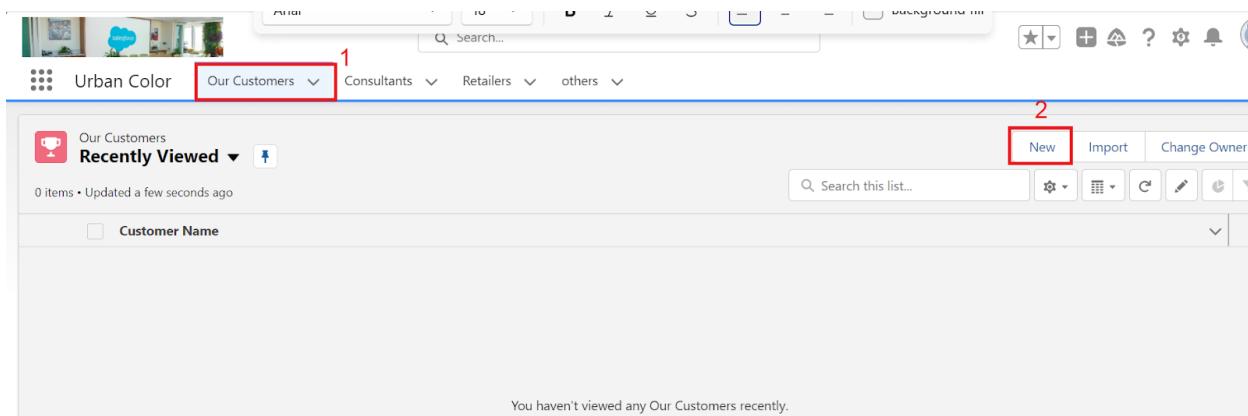
We need to understand user adoption and navigation. How to interact with database and their records.

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

### Create Our Customer Record

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





### View Record (Our Customer)

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

A screenshot of a customer record detail page. The top section is labeled 'Information' with a red box around it and the number '1' above it. It contains fields for 'Customer Name' (with a red box around the input field and the error message 'Complete this field.' below it), 'Customer id' (disabled), 'Phone' (with a red box around the input field), and 'Email id' (disabled). To the right, there's an 'Owner' section showing a user icon and the name 'Hazari Ajay Kumar'. The bottom section is labeled 'Address' and contains three buttons: 'Cancel', 'Save & New', and 'Save' (which has a red box around it and the number '2' above it).

The screenshot shows the Zoho CRM interface. At the top, there is a navigation bar with tabs: 'Urban Color' (selected), 'Our Customers' (highlighted with a red box and number 1), 'Consultants', 'Retailers', and 'others'. Below the navigation is a search bar with placeholder text 'Search this list...' and various filter and sort options.

The main area displays a list titled 'Recently Viewed' under the 'Our Customers' tab. It shows two items: 'Suresh' (marked with a red box and number 2) and 'Kamal'. Each item has a checkbox next to it and a small edit icon.

Below the list, a card displays the details for 'Suresh':

Our Customer	
<b>Suresh</b>	
Related	<b>Details</b>
Customer Name	Suresh
Customer id	5
Phone	97583873728
Email id	suresh@gmail.com
Address	Hyderabad
Additional Information	
Customer	

On the right side of the card, there is an 'Owner' section with a profile picture and the name 'Hazari Ajay Kumar'.

### Delete Record (Our Customer)

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

This screenshot shows a CRM application interface for 'Our Customers'. The top navigation bar includes 'Urban Color' and dropdown menus for 'Our Customers', 'Consultants', 'Retailers', and 'others'. A search bar and various icons are also present. The main content area displays a list titled 'Recently Viewed' with 2 items updated 2 minutes ago. The list includes columns for 'Customer Name' and row numbers 1 and 2. The first item is 'Suresh' and the second is 'Kamal'. To the right of the list is a toolbar with 'New', 'Import', 'Change Owner', and other options. A context menu is open over the second item, labeled '2', with options 'Edit', 'Delete', and 'Change C'. A red box highlights the 'Delete' option.

1

2

3

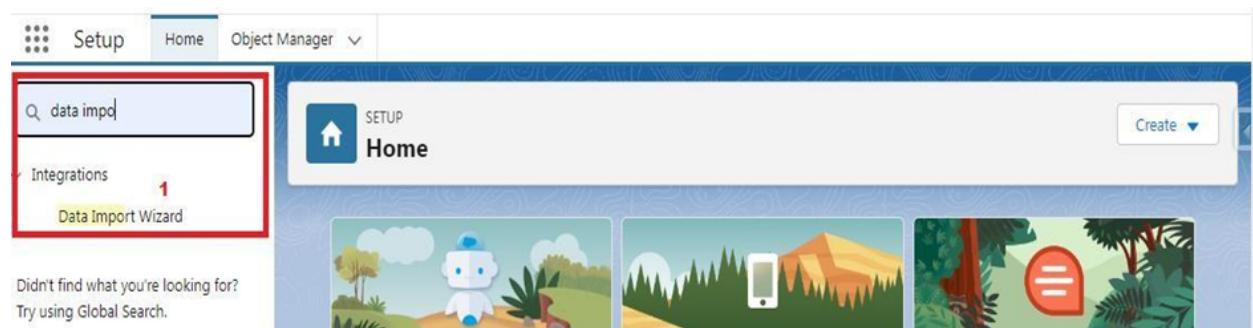
This screenshot shows the same CRM application after a delete operation. A confirmation dialog box is centered on the screen with the title 'Delete Our Customer'. It asks 'Are you sure you want to delete this Our Customer?'. There are 'Cancel' and 'Delete' buttons at the bottom. The background list of customers is partially visible.

## 10. Import Data

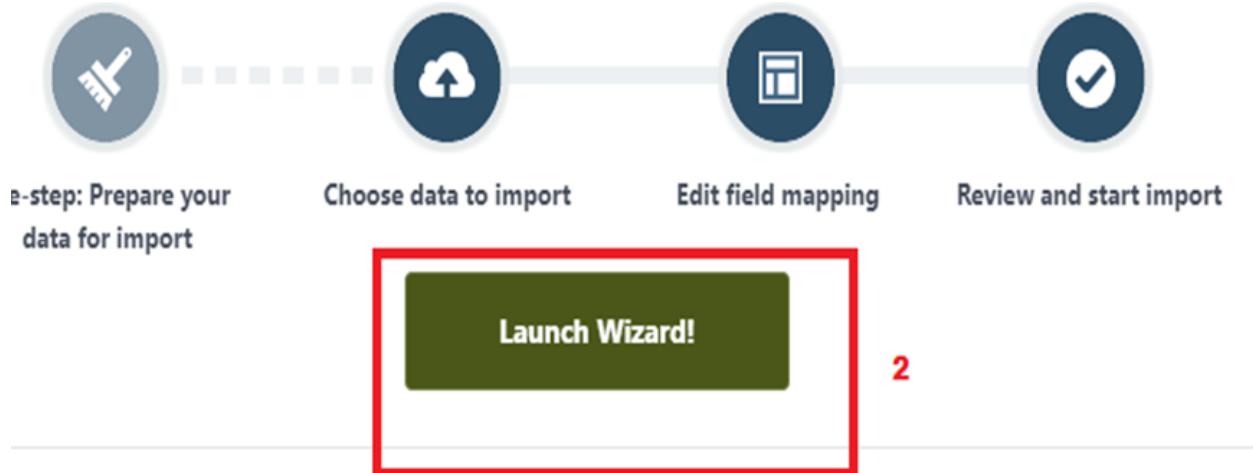
**Data Import Wizard**—This tool, accessible through the **Setup menu**, allows you to import data into common standard objects such as **Contacts**, **Leads**, **Accounts**, as well as data into custom objects.

### To Import Data

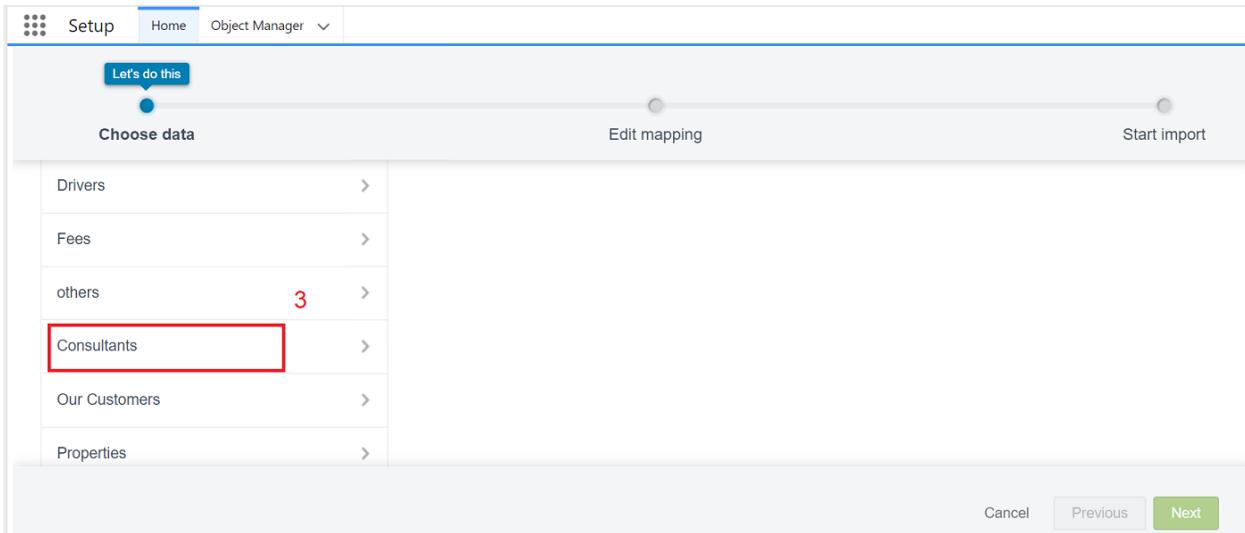
1. From **Setup**, click the **Home tab**.
2. In the **Quick Find box**, enter Data Import and select **Data Import Wizard**.



3. Click **Launch Wizard!**



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



## 5. Select Add New Records.

### Import your Data into Salesforce

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

This screenshot shows the 'What do you want to do?' section of the import wizard. It has three tabs: 'What kind of data are you importing?' (Standard objects, Custom objects), 'What do you want to do?' (Add new records, Update existing records, Add new and update existing records), and 'Where is your data located?'. The 'Add new records' option is highlighted with a red box and a red number '4'.

## 6. Click CSV and choose the file **Consultant\_CSV** which was created earlier. Click Next.

Choose data      Edit mapping      Start import

What kind of data are you importing? ?

Standard objects    Custom objects

Attendees    Buyers    Customers    Departments

What do you want to do? ?

Add new records ✓

Match by: ?  
--None--

Which User field in your file designates record owners? ?  
--None--

Trigger workflow rules and processes? ?  
 Trigger workflow rules and processes for new and updated records

Where is your data located? ?

Drag CSV file here to upload

CSV

5

Cancel   Previous   **Next**

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

Setup   Home   Object Manager   Almost done

Choose data      Edit mapping      Start import

Edit Field Mapping: Consultants

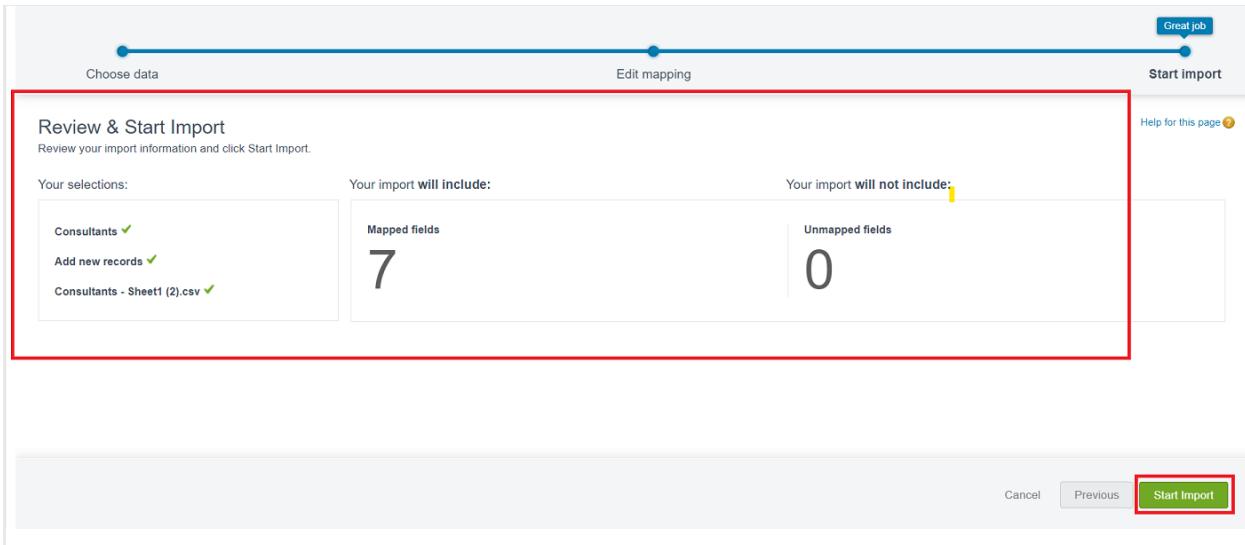
Your file has been auto-mapped to existing Salesforce fields, but you can edit the mappings if you wish. Unmapped fields will not be imported.

Help for this page

Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	Consultant Name	Consultant Name	Dev Raj	Ajith	Babu
Change	Mobile Number	Mobile Number	984638732	784653673	902839439
Change	Delivery Type	Delivery Type	Self Pickup	Courier	Self Pickup
Change	Address	Address		Hyderabad	
Change	Products	Products	Lipstick	Compact	Face Pack
Change	Payment	Payment	Cash	UPI	Credit Card
Change	Email	Email		ajith@gmail.com	Babu34@gmail.com

Cancel   Previous   **Next**

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



9. Click **OK** on the popup.

**Congratulations**, your import has started!  
Click OK to view your import status on the Bulk Data Load Job page.

**OK**

10. Scroll down the **page** and verify that your data has been imported under **Batches**.

Batches												
View Request	View Result	Batch ID	Start Time	End Time	Total Processing Time (ms)	API Active Processing Time (ms)	Apex Processing Time (ms)	Records Processed	Records Failed	Retry Count	State Message	Status
View Request	View Result	7512w00000Xqrar	6/19/2023, 11:05 PM	6/19/2023, 11:05 PM	103	52	0	9	0	0	Completed	

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

**Note:** Perform **Field Mapping** carefully.

Here is the formatted text for your document:

# 11.What are Reports?

## Reports

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

There are 4 types of report formats in Salesforce:

### 1. Tabular Reports:

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

### 2. Summary Reports:

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

### 3. Matrix Reports:

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

### 4. Joined Reports:

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

## Report Types:

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

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

**There are 2 types of report types:**

## **1. Standard Report Types:**

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

## **2. Custom Report Types:**

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

**There are 3 types of access levels for folders:**

### **1. Viewer:**

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

### **2. Editor:**

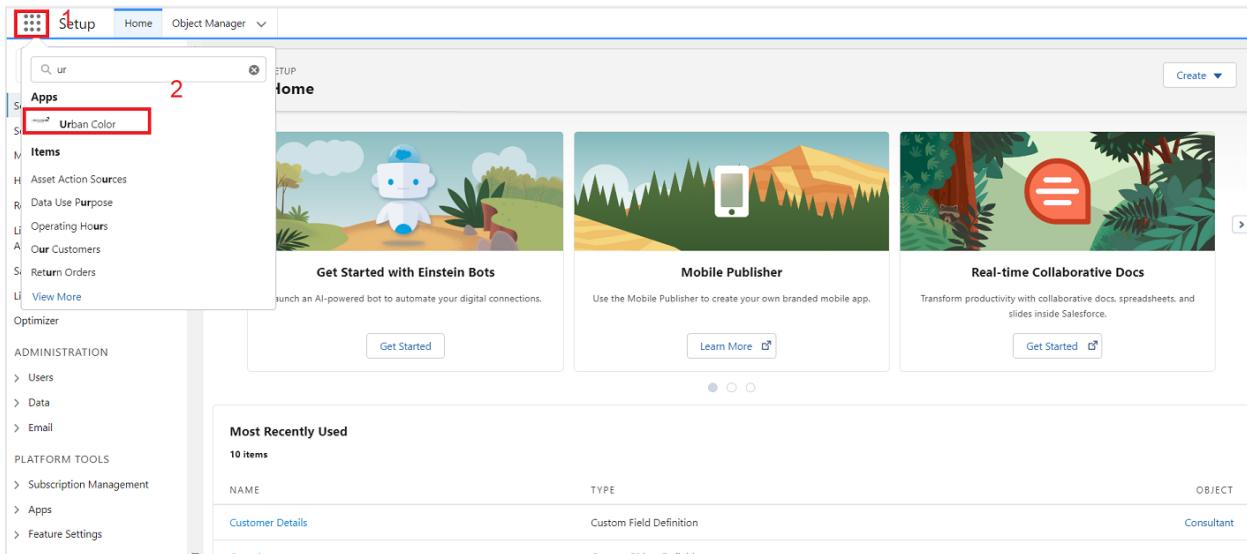
- Users can view and modify the reports and move them to/from any other folders they have access to as Editor or Manager.

### **3. Manager:**

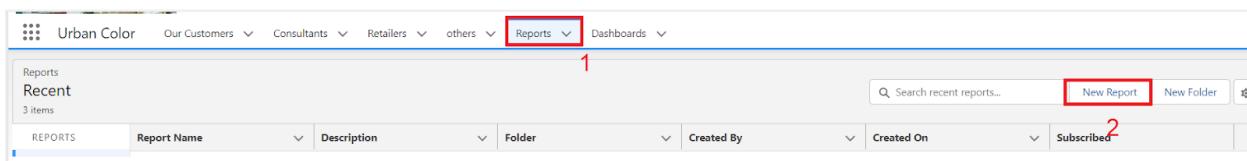
- Users can do everything Viewers and Editors can do, plus control other users' access levels to the folder.
- Managers can also delete the report.

## **11.1.Create Report**

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



#### 4. Click New Report.



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

6. Customize your report by selecting the following columns: **Consultant Name, Delivery Type, Products, Payment**

1	2	3	4	5
Dev Raj	Self Pickup	Lipstick	Cash	
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	
Shankar	Self Pickup	Face Pack	Cash	
Sandeep	Courier	Eye Liner	Upi	

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

The screenshot shows a report configuration interface with the following details:

- REPORT:** New Consultants Report
- Fields:**
  - Groups:** GROUP ROWS, Add group...
  - Columns:** Consultant: Consultant Name, Delivery Type, Products, Payment
- Context Menu (Payment Column):**
  - 1: Sort Ascending, Sort Descending
  - 2: Bucket This Column (highlighted with a red box)
  - Group Rows by This Field
  - Show Unique Count
  - Move Left, Move Right
  - Remove Column
- Buttons:** Save & Run, Save, Close, Update Preview Automatically

## 8. Name the bucket Payment Type.

The screenshot shows the 'Edit Bucket Column' dialog with the following fields:

- \* Field:** Payment
- \* Bucket Name:** Payment type
- All Values (4):** Unbucketed Values (4)
- Search Values:** Search bar and a list of values with checkboxes:
 

VALUE	BUCKET
Credit Card	
Debit Card	
Upi	
Cash	
- Buttons:** Add Bucket, Move To, Cancel, Apply

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

10. Click Add Bucket and name it Cash.

## Edit Bucket Column

\* Field  \* Bucket Name

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

1  Bucket remaining values as Other

**Add Bucket**

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

## Edit Bucket Column

\* Field
\* Bucket Name

X

All Values (4)
Search Values (0)

	VALUE	BUCKET
<input type="checkbox"/>	Net Banking (0)	
<input type="checkbox"/>	Cash (0)	
<input type="checkbox"/>	Credit Card	
<input type="checkbox"/>	Debit Card	
<input type="checkbox"/>	Upi	
<input type="checkbox"/>	Cash	

Unbucketed Values (4)
Add Bucket
Move To ▾

Bucket remaining values as Other
Cancel
Apply

## Edit Bucket Column

The screenshot shows two instances of the 'Edit Bucket Column' dialog box.

**Top Dialog:**

- Field:** Payment
- Bucket Name:** Payment type
- Value List:** All Values (4) (highlighted with a red box)
  - Net Banking (0)
  - Cash (0)
  - Unbucketed Values (4)
  - Bucket remaining values as Other
- Bucket Table:**

VALUE	BUCKET
<input checked="" type="checkbox"/> Credit Card	
<input checked="" type="checkbox"/> Debit Card	
<input checked="" type="checkbox"/> Upi	
<input type="checkbox"/> Cash	
- Buttons:** Add Bucket, Move To (highlighted with a red box)

**Bottom Dialog:**

- Field:** Payment
- Bucket Name:** Payment type
- Value List:** All Values (4) (highlighted with a red box)
  - Net Banking (3)
  - Cash (1)** (highlighted with a red box)
  - Unbucketed Values (0)
  - Bucket remaining values as Other
- Bucket Table:**

VALUE	BUCKET
<input checked="" type="checkbox"/> Cash	Cash
- Buttons:** Cancel, Apply (highlighted with a red box)

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

13. Click Apply.

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

The screenshot shows the 'Fields' panel of the 'New Consultants Report' configuration.

**Fields Panel:**

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

**Report Preview:**

- Grouping:** Payment type
- Subtotals:**
  - Net Banking (7)
  - Cash (2)
  - Total (9)

15.Click **Refresh**.

16.Click **Save and Run**.

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

The screenshot shows the 'New Consultants Report' page. On the left, the 'Fields' panel is open, displaying sections for 'Groups' and 'Columns'. The 'Groups' section has a red box around the 'Payment type' field. The 'Columns' section also has a red box around the 'Payment type' field. To the right, a preview of the report data is shown, titled 'Net Banking (7)'. The data is presented in a grid with columns: Consultant: Consultant Name, Delivery Type, Products, and Payment. Below the main preview, there are 'Subtotal' and 'Total' sections for 'Cash' and 'Total (9)'.

The screenshot shows the 'Save Report' dialog box. At the top, it says 'Save Report'. The first field, 'Report Name', contains 'Consultants Report' and has a red box around it with the number '1' above it. Below it is a 'Report Unique Name' field containing 'Consultants\_Report\_hvb'. The next section is 'Report Description', which is currently empty. In the 'Folder' dropdown, 'Private Reports' is selected and has a red box around it with the number '2' above it. To the right of the dropdown is a 'Select Folder' button. At the bottom right of the dialog are 'Cancel' and 'Save' buttons, with the 'Save' button having a red box around it and the number '3' above it.

## 11.2.View Report

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

1. Click the **Setup** icon in the top left corner.

2. Type **Urban Color** in the search bar.

The page displays several sections:

- Apps**: Shows cards for "Get Started with Einstein Bots", "Mobile Publisher", and "Real-time Collaborative Docs".
- Items**: Lists "Asset Action Sources", "Data Use Purpose", "Operating Hours", "Our Customers", "Return Orders", and "View More".
- Optimizer**: Shows sections for "Users", "Data", and "Email".
- ADMINISTRATION**: Shows sections for "Subscription Management", "Apps", and "Feature Settings".
- Most Recently Used**: Shows a table with 10 items, including "Customer Details" (Custom Field Definition) and "Consultant" (Object).

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

3. Click the **Reports** tab in the top navigation bar.

4. Click on the **Consultants Report** in the Recent section of the report list.

The page shows a list of reports:

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

## 12.Dashboards

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

### 12.1.Create Dashboard

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

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

New Dashboard

---

\* Name 3

Consultant Dashboard

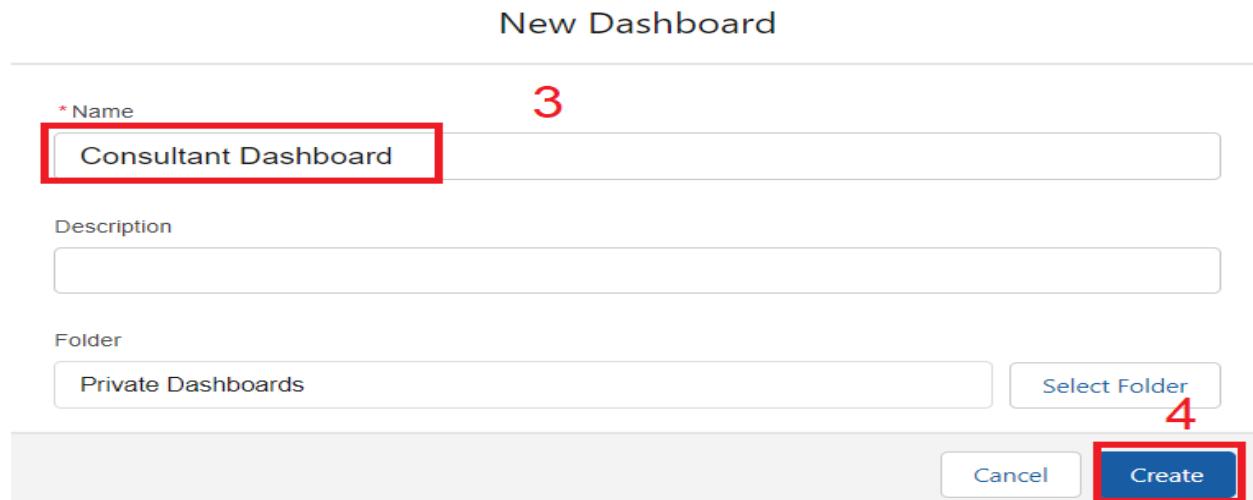
Description

---

Folder 4

Private Dashboards Select Folder

Cancel Create



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

Select Report

Reports

Recent

Created by Me

Private Reports

Public Reports

All Reports

Folders

Created by Me

Shared with Me

All Folders

Select Report

Search Reports and Folders...

Consultants Report  
Hazari Ajay Kumar - [REDACTED] Private Reports

Sample Flow Report: Screen Flows  
Automated Process - Dec 17, 2022, 7:50 PM - Public Reports

Opportunities Details  
Hazari Ajay Kumar - Apr 13, 2023, 12:02 AM - Private Reports

Rental New 1  
Hazari Ajay Kumar - Feb 2, 2023, 10:43 PM - Public Reports

Cancel Select

## 6. Choose Data Visualization:

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

Add Component

Report

Consultants Report

Use chart settings from report

Display As

X-Axis

Payment type

Record Count

Preview

Consultants Report

Record Count

Net Banking 7

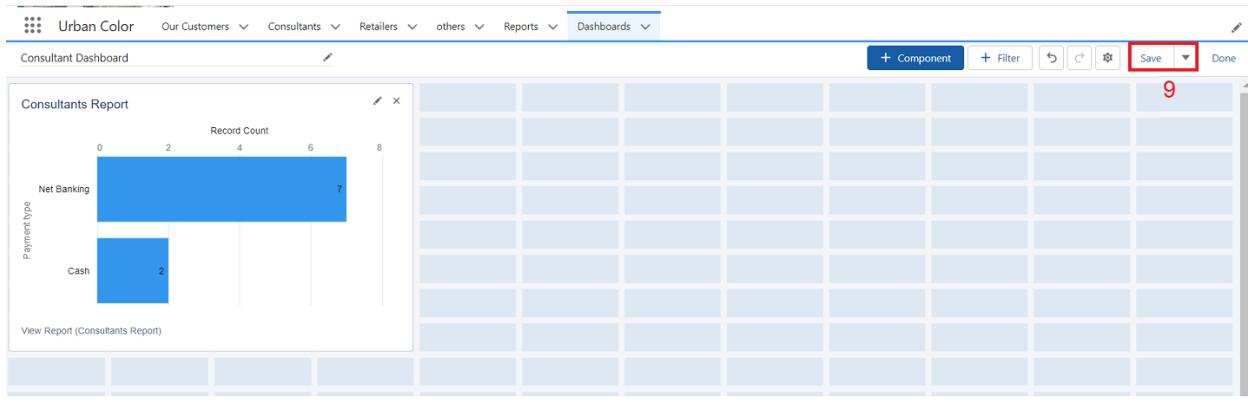
Cash 2

View Report (Consultants Report)

Cancel Add

## 7. Save Your Dashboard:

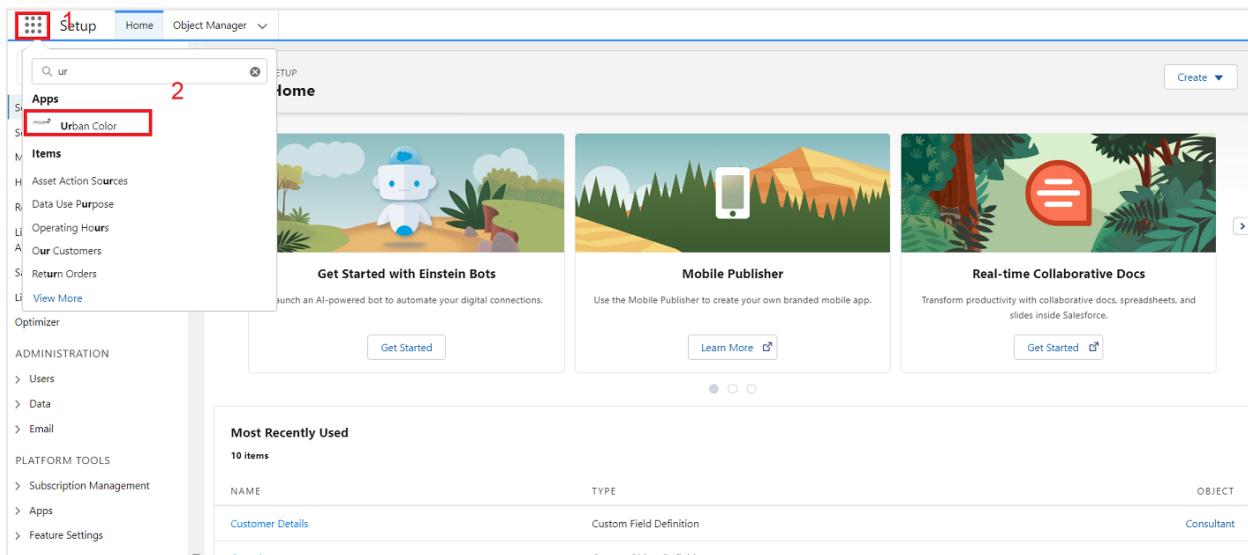
- After configuring the components and visualizations, click "Save" to finalize your dashboard.



## 12.2. View Dashboard

To view the dashboard, follow these steps:

1. Open the App Launcher:
  - Click on the App Launcher icon on the left side of the screen.
2. Search for the Dashboard:
  - Type "Candidate Internal Result Card" into the search bar.
  - Click on the "Candidate Internal Result Card" option that appears.



### 3. Navigate to the Dashboard Tab:

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

### 4. View the Graph:

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

The screenshot shows the 'Urban Color' application interface. At the top, there is a navigation bar with links: 'Our Customers', 'Consultants', 'Retailers', 'others', 'Reports', and 'Dashboards'. The 'Dashboards' link is highlighted with a red box and has a dropdown arrow. Below the navigation bar, the main content area is titled 'Dashboards' and 'Recent'. It displays a table with three items:

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

On the left side, there is a sidebar with sections: 'DASHBOARDS' (Recent, Created by Me, Private Dashboards, All Dashboards), and 'FOLDERS'.