

Cosmetics Store Management

Description :

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

Summary :

1. **Key Features: Customer Management:**

- **Contacts & Accounts:** Efficiently manage customer details, including contact information, purchase history, and preferences.
- **Customer Segmentation:** Segment customers based on various criteria such as purchase frequency, product preference, and location for targeted marketing.

2. **Product Management:**

- **Product Catalog:** Maintain an up-to-date catalog of cosmetic products with detailed descriptions, pricing, and availability.
- **Inventory Tracking:** Monitor stock levels, set reorder points, and track inventory turnover to ensure optimal stock levels.

3. **Sales Management:**

- **Order Processing:** Automate the order management process, including order creation, status tracking, and invoicing.
- **Sales Analytics:** Generate reports and dashboards to analyze sales trends, identify top-selling products, and forecast future sales.

4. **Marketing & Promotions:**

- **Campaign Management:** Create and manage marketing campaigns, including email promotions, discounts, and special offers.
- **Customer Engagement:** Use Salesforce tools to engage with customers through personalized offers and targeted marketing.

5. **Customer Service:**

- **Case Management:** Track and resolve customer service issues and complaints efficiently.
- **Knowledge Base:** Provide customers with access to a self-service portal for FAQs, product information, and troubleshooting.

6. **Integration & Automation:**

- **Salesforce Integration:** Integrate with other systems such as ERP or e-commerce

platforms to ensure seamless data flow.

- **Workflow Automation:** Automate repetitive tasks and processes to increase operational efficiency and reduce manual errors

TASKS :

1.Creating the Objects :

To Create an object:

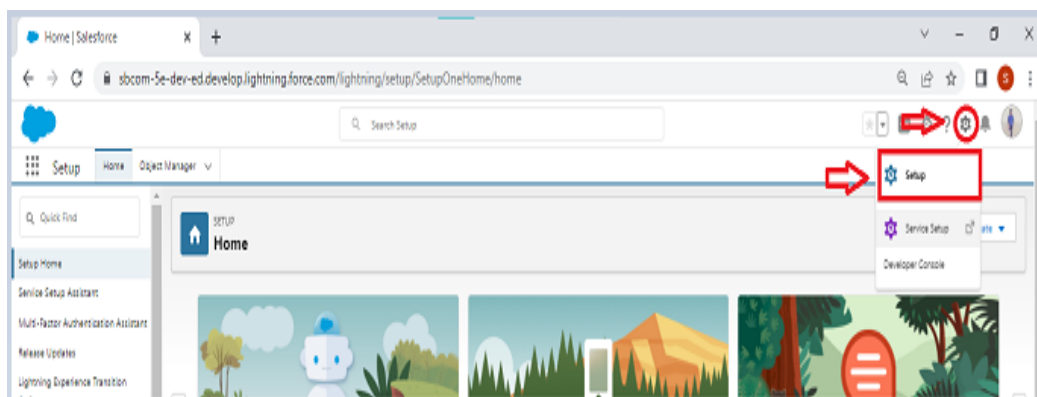
Creation of Objects for Urban Color, For this Urban Color we need to create 3 objects i.e .,Our Customers,Consultants,Retailers,others.

The below steps will assist you in creating those objects.

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

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

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



We need to create 4 objects named Our customer,Consultant,Retailer,Others.
For creating the another 3 objects,we need t follow the same procedure as mentioned above.

After the completion of object creation task,We'll move on to further steps.

Task2 : Creating Fields and Relationship _:

- An object relationship in Salesforce is a two-way association between two objects. Relationships are created by creating custom relationship fields on an object. This is done so that when users view records, they can also see and **access related data**.

Fields in Our Customers objects :

Fields in Our Customers objects follow below data types:

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

Fields in Consultants objects

Fields in Consultants objects follow below data types:

| | | |
|---|--|------------------------------|
| | 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 |

Fields in Others objects

Fields in Others objects follow below data types:

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

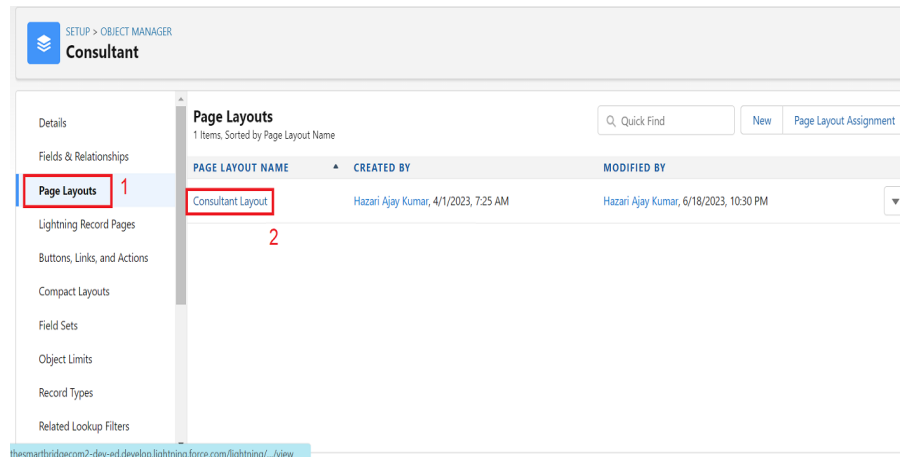
- In the Cosmetic Store Management System built on Salesforce, fields and relationships are designed to streamline operations and enhance data management. Key fields include customer details (e.g., contact information and purchase history), product specifics (e.g., SKU, price, and inventory levels),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

and suppliers.

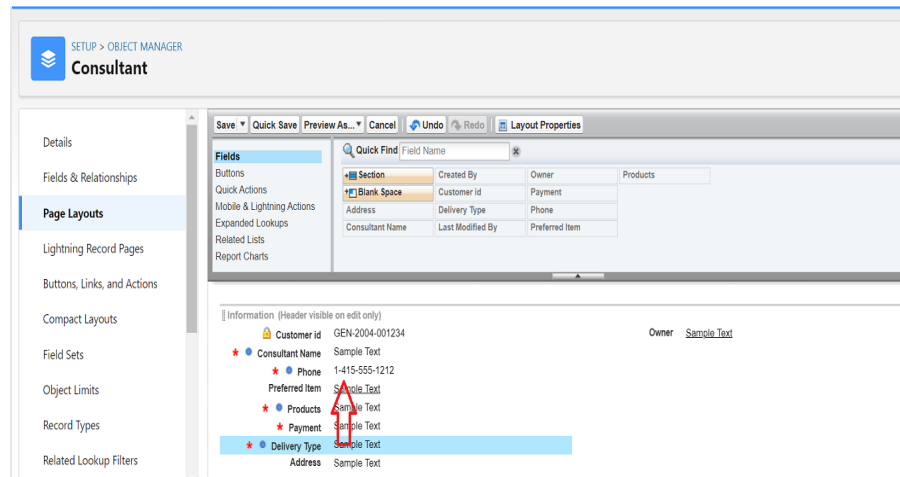
1. **Task 3: Page Layout creation :**

From the Salesforce setup menu, go to "Object Manager" and select the Consultants object.

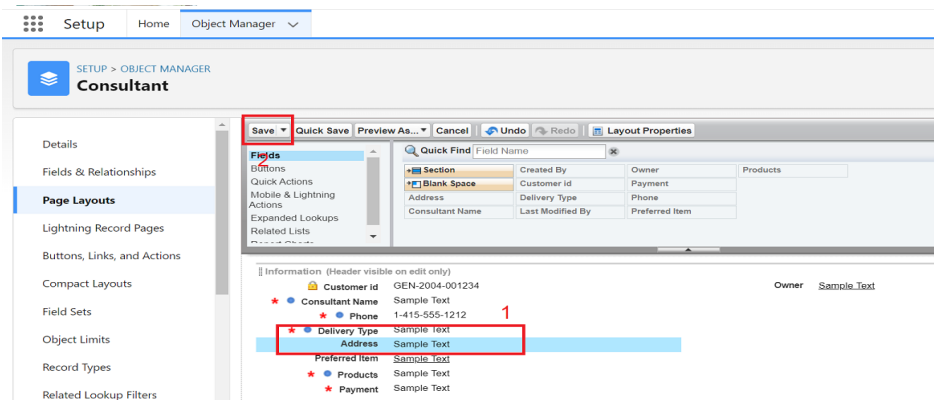
- Click on "Page Layouts" in the left sidebar. This will display a list of available page layouts for the selected object.
- Select the Consultant Layout page layout.



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



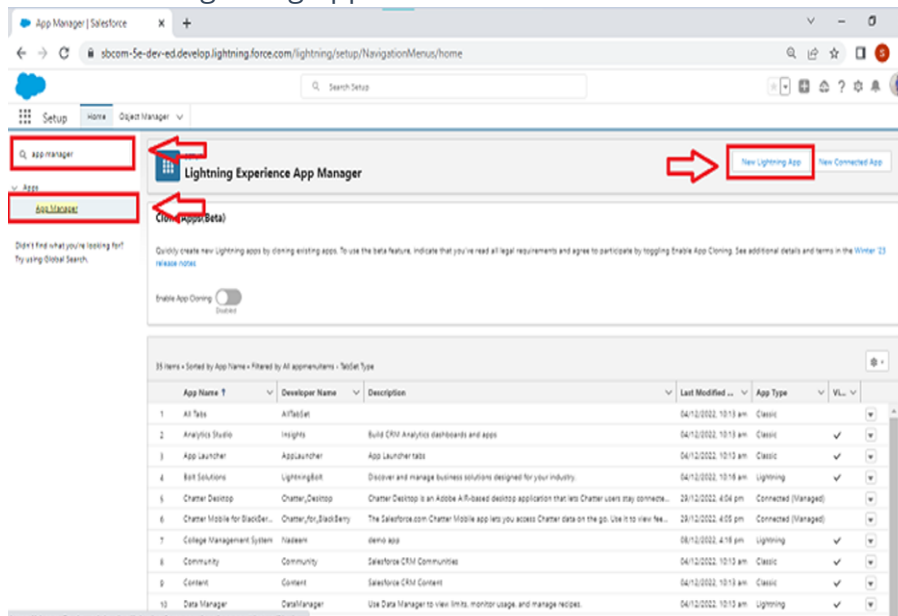
- Click on Save



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

► Task 4 : Creation of a Lightning App :

- An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar
- To create a lightning app page:
 - Go to setup page --> search “app manager” in quick find --> select “app manager” --> click on New lightning App.



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

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.

► Task 5: Creating Profiles :

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

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

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

- From Setup enter Profiles in the Quick Find box, and select Profiles.
- From the list of profiles, find Standard User.
- Click Clone.
- For Profile Name, enter Store Supervisor.
- Click Save.
- While still on the Store Supervisor profile page, then click Edit.
- Scroll down to Custom Object Permissions and give access for Create,Read,Edit,Delete,View all and modify all for Our Customers,Consultants,Retailers,Others.
- Scroll down to Custom App Settings and give access for Urban Color.

To create a new profile:

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

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar has a search bar with 'profil' and a list of 'Users' and 'Profiles'. The main content area is titled 'Profiles' and shows the 'Store Supervisor' profile. Below the profile name, there is a description: 'Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing the...'. A section titled 'Profile Detail' shows the 'Name' as 'Store Supervisor', 'User License' as 'Salesforce', and 'Custom Profile' as checked. Below this is a table of 'Custom Object Permissions' with columns for 'Object Name', 'Create', 'Read', 'Edit', 'Delete', 'View All', and 'Modify All'. The table lists various objects like 'Community (standard__Community)', 'Content (standard__Content)', 'Data Manager (standard__DataManager)', 'Digital Experiences (standard__SalesforceCMS)', 'Lightning Usage App (standard__LightningInstrumentation)', 'LWC LEARNINGS (LWC_LEARNINGS)', 'Marketing (standard__Marketing)', 'Queue Management (standard__QueueManagement)', 'Rental Management (Rental_Management)', 'Salesforce Scheduler Setup (standard__LightningScheduler)', 'Sample Console (standard__ServiceConsole)', 'Service (standard__Service)', 'Service Console (standard__LightningService)', 'Site.com (standard__Sites)', 'Subscription Management (standard__RevenueCloudConsole)', 'Urban Color (Urban_Color)', 'Vehicle Management (Vehicle_Management)', and 'WDC (standard__Work)'. The 'Urban Color (Urban_Color)' row is highlighted, showing 'View All' and 'Modify All' permissions checked. Below the table is a section for 'Service Provider Access' and 'Tab Settings'.

| Object Name | Create | Read | Edit | Delete | View All | Modify All |
|---|-------------------------------------|--------------------------|--------------------------|--------------------------|-------------------------------------|-------------------------------------|
| Community (standard__Community) | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Content (standard__Content) | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Data Manager (standard__DataManager) | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Digital Experiences (standard__SalesforceCMS) | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Lightning Usage App (standard__LightningInstrumentation) | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| LWC LEARNINGS (LWC_LEARNINGS) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Marketing (standard__Marketing) | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Queue Management (standard__QueueManagement) | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Rental Management (Rental_Management) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Salesforce Scheduler Setup (standard__LightningScheduler) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Sample Console (standard__ServiceConsole) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Service (standard__Service) | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Service Console (standard__LightningService) | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Site.com (standard__Sites) | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Subscription Management (standard__RevenueCloudConsole) | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Urban Color (Urban_Color) | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Vehicle Management (Vehicle_Management) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| WDC (standard__Work) | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

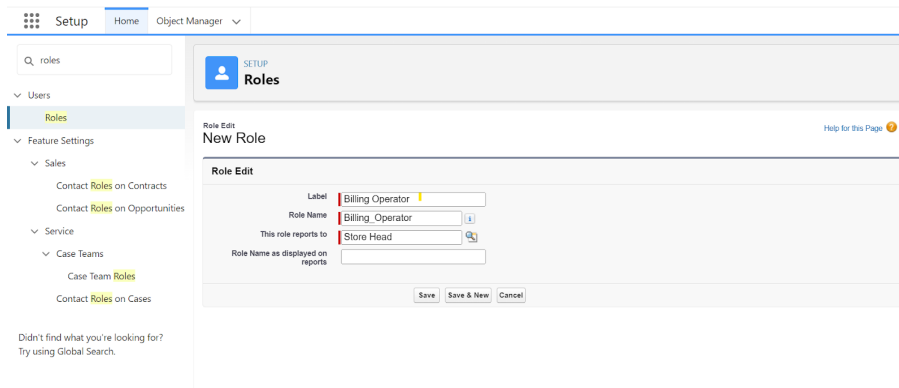
3. Click on Save.
4. Similarly Create operator profile ,Clone Salesforce Platform user and give access only for Billing Operator.

5. Click On Save.

Task 6: Setting up Roles :

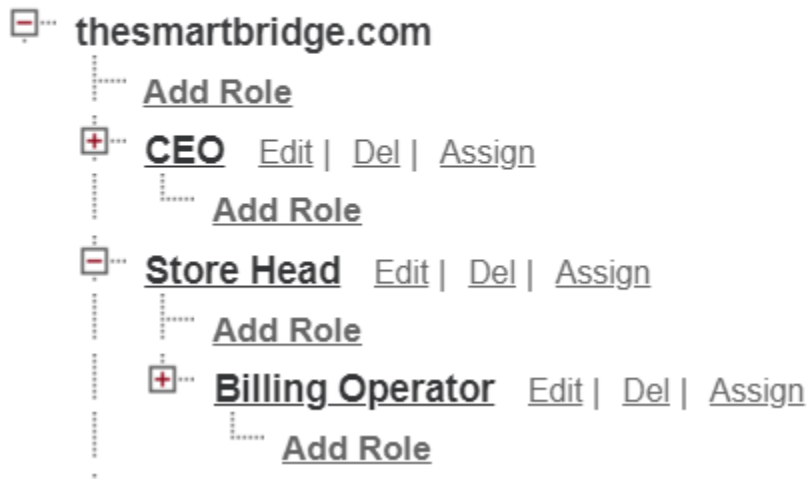
- Roles are record-level access controls that define what data a user can see in Salesforce.

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



Your Organization's Role Hierarchy

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



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

► **Task 7 : Creation of an User :**

- In Salesforce, a user represents an individual who has access to the Salesforce platform and its functionalities. Each user is assigned a unique username, and their access level and permissions are defined by their profile and role within the organization. Users can perform tasks such as managing records, running reports, and collaborating with team members based on their assigned permissions. Salesforce administrators configure user settings, including login credentials, security settings, and access to various features and data, ensuring that users can efficiently and securely perform their job

functions.

1. From Setup, in the Quick Find box, enter Users, and then select Users.
2. Click New User.
3. Enter the user's name Amar K and (Your) email address and a unique username in the form of an email address. By default, the username is the same as the email address.
4. Select a Role (Store Head)
5. Select a User Licence As Salesforce.
6. Select a profile as Store Supervisor.
7. Check Generate new password and notify the user immediately to have the user's login name and a temporary password emailed to your email.

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

The image displays two screenshots of the Salesforce Setup interface for creating a new user.

Top Screenshot: General Information

- First Name:** Amar
- Last Name:** K
- Alias:** ak
- Email:** marik@gmail.com
- Username:** amar2133@salesforce.co
- Nickname:** User167161323313747430
- Title:** Store Supervisor
- Company:**
- Department:**
- Division:**
- Role:** Store Head
- User License:** Salesforce
- Profile:** Store Supervisor
- Active:** ☒
- Marketing User:** ☐
- Offline User:** ☐
- Knowledge User:** ☐
- Flow User:** ☐
- Service Cloud User:** ☐
- Site.com Contributor User:** ☐
- Site.com Publisher User:** ☐
- WDC User:** ☐
- Data.com User Type:** --None--

Bottom Screenshot: Single Sign On Information and Locale Settings

- Single Sign On Information:**
 - Federation ID:**
- Locale Settings:**
 - Time Zone:** (GMT-07:00) Pacific Daylight Time (America/Los Angeles)
 - Locale:** English (United States)
 - Language:** English
- Approver Settings:**
 - Delegated Approver:**
 - Manager:**
 - Receive Approval Request Emails:** Only if I am an approver
 - ☐ Generate new password and notify user immediately

Task 8 : Creating/Modifying Records :

- Creating or modifying records in Salesforce involves navigating to the relevant object tab, clicking "New" to create a record or "Edit" to update an existing one. For creating records, users fill out the necessary fields and click "Save" to store the new data. For modifications, users locate the record, make the desired changes in the editable fields, and then click "Save" to apply the updates. This process ensures accurate and up-to-date information within the Salesforce system.

Steps to Create a Record:

1. **Navigate to the Object Tab:**
 - Log in to Salesforce and go to the relevant object tab (e.g., Accounts, Contacts, Opportunities).
2. **Click “New”:**
 - On the object’s home page or list view, click the “New” button to initiate the creation of a new record.
3. **Enter Record Information:**
 - Complete the fields in the record form with the required and optional data. This may include details like names, addresses, dates, and other relevant information.
4. **Save the Record:**
 - Once all necessary information is entered, click “Save” to create and store the new record in Salesforce.

Steps to Modify a Record:

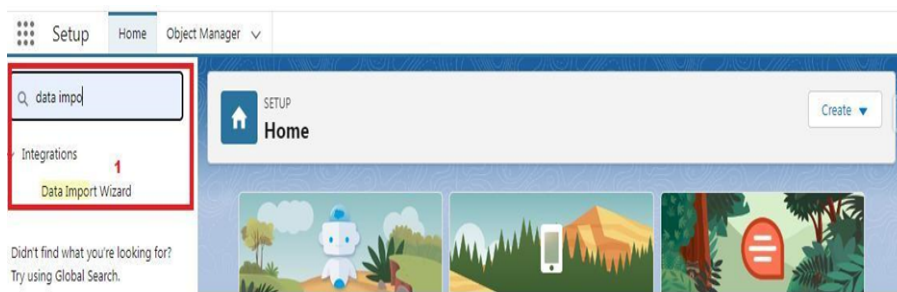
1. **Find the Record:**
 - Locate the record you want to modify by using the object’s list view, search function, or related lists.
2. **Open the Record:**
 - Click on the record’s name to open it and view its details.
3. **Click “Edit”:**
 - In the record’s detail view, click the “Edit” button to enable editing mode.
4. **Update Record Information:**
 - Make the necessary changes to the fields as required. Ensure all required fields are correctly filled out.
5. **Save the Changes:**
 - After making the updates, click “Save” to apply and store the modifications.

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

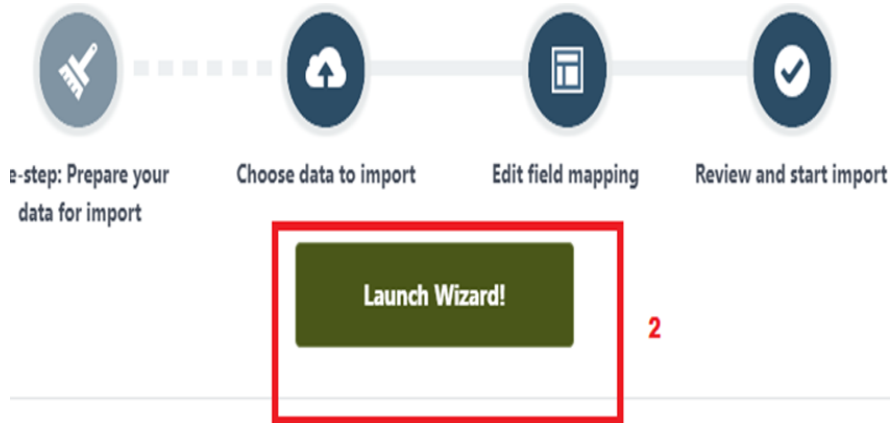
► **Task 9: Importing Data :**

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

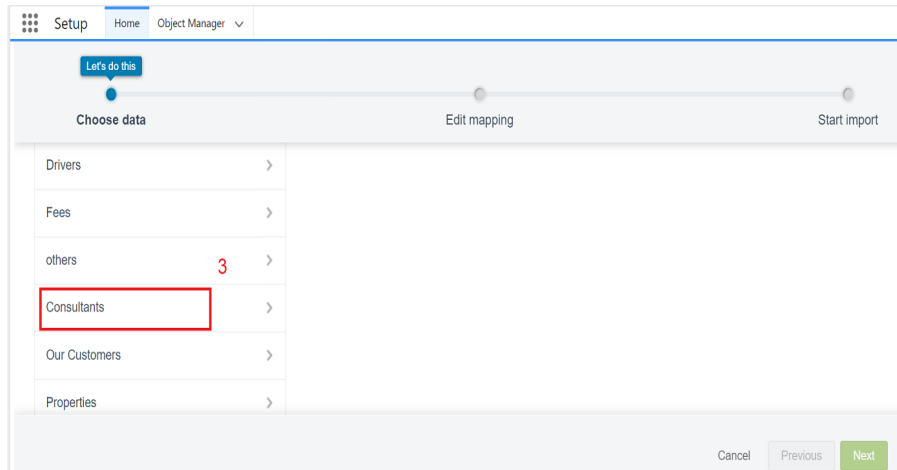
1. From Setup, click the Home tab.
2. In the Quick Find box, enter Data Import and select Data Import Wizard



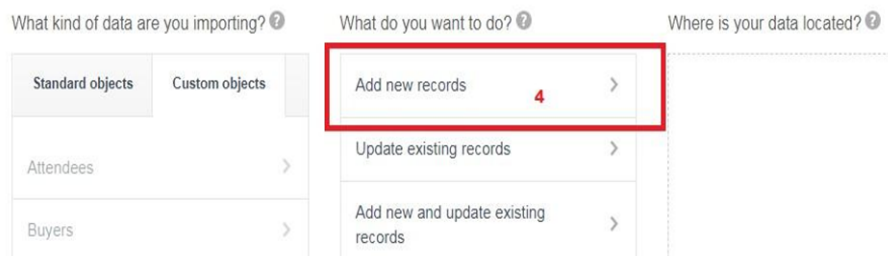
3. Click Launch Wizard!



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.



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

Choose data Edit mapping Start import

What kind of data are you importing? What do you want to do? Where is your data located?

Standard objects Custom objects

Attendees > Buyers > Customers > Departments ✓

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

Drag CSV file here to upload

CSV

5

Cancel Previous Next

- 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.

| Edit | Mapped Salesforce Object | CSV Header | Example | Example | Example |
|--------|--------------------------|-----------------|-------------|-----------------|------------------|
| Change | Consultant Name | Consultant Name | Dev Raj | Ajith | Babu |
| Change | Mobile Number | Mobile Number | 984638732 | 784853673 | 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

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

Choose data Edit mapping Start import

Review & Start Import

Review your import information and click Start Import.

Your selections:

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

Your import will include:

Mapped fields: 7

Your import will not include:

Unmapped fields: 0

Cancel Previous Start Import

- 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 |
| View Request | View Result | 7512w00000Xqar | 6/19/2023, 11:05 PM | 6/19/2023, 11:05 PM | 103 | 52 | 0 | 9 | 0 | 0 |
| | | | | | | | | Status | | |
| | | | | | | | | Completed | | |

11. Make sure you have 0 records under the records failed column.

Note - Do Field mapping carefully.

Task 10 :Accessing Reports :

Creating Report :

Click App Launcher

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

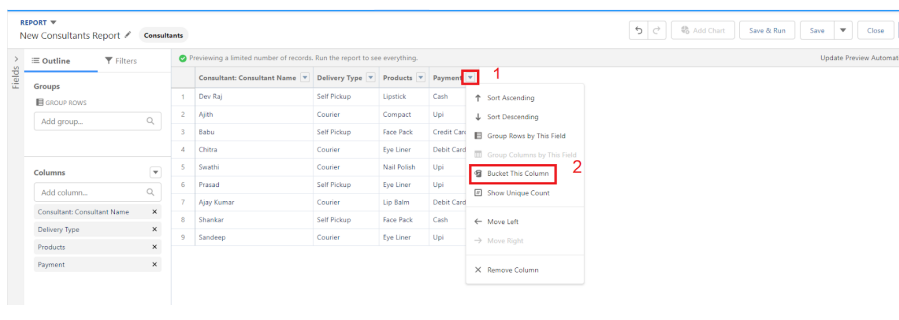
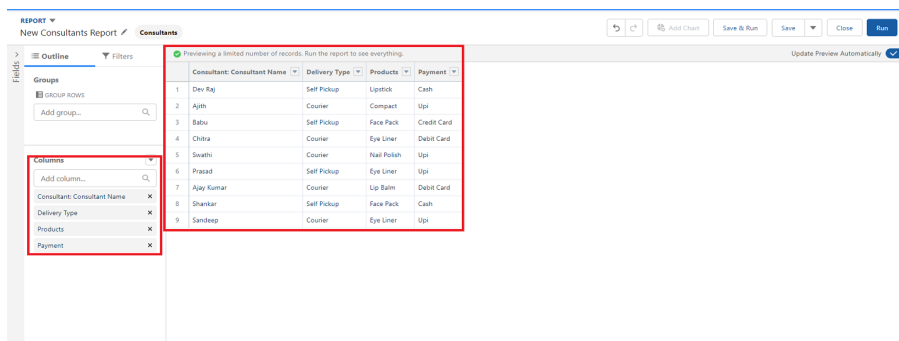
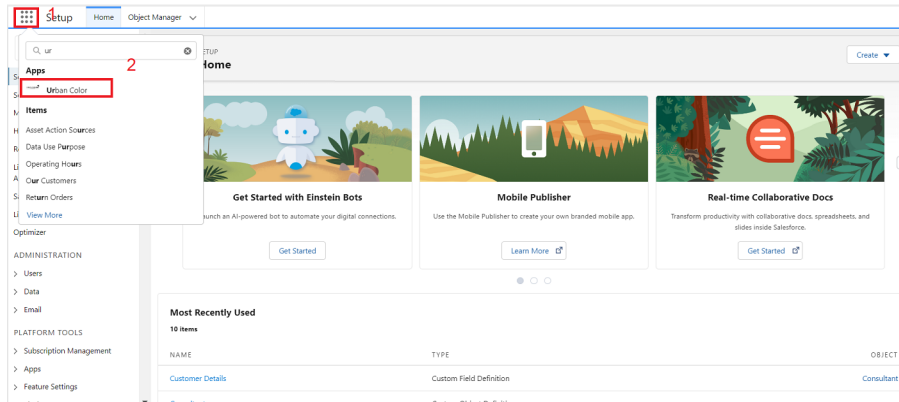
9.Click on Add Bucket and name it as NetBanking

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

Bucket Name
Payment type

All Values (4)
Unbucketed Values (4)

Search Values

☐ VALUE

☐ Credit Card

☐ Debit Card

☐ Upi

☐ Cash

☐ Bucket remaining values as Other

Add Bucket
Move To

Cancel
Apply

Edit Bucket Column

* Field

Payment X

* Bucket Name

Payment type

All Values (4)

Bucket Name

Unbucketed Values (4)

☐ Bucket remaining values as Other

Search Values

☐ VALUE

BUCKET

☐ Credit Card

☐ Debit Card

☐ Upi

☐ Cash

Add Bucket

Move To ▼

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

☐ Credit Card

☐ Debit Card

☐ Upi

☐ Cash

Add Bucket

Move To ▼

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

Search Values

Q

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

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

Add Bucket

Search Values

Q

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

Move To ▼

Cancel

Apply

Edit Bucket Column

* Field

Payment

* Bucket Name

Payment type

All Values (4)

Net Banking (3)

Cash (0)

Unbucketed Values (1)

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 | |

☐ Bucket remaining values as Other

Add Bucket

Move To

Cancel

Apply

* Field

Payment

* Bucket Name

Payment type

All Values (4)

Net Banking (3)

Cash (1)

Unbucketed Values (0)

Search Values

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

☐ Bucket remaining values as Other

Add Bucket

Move To

Cancel

Apply

14.In Group Rows Add Payment Type Bucket Field.

15.Click refresh

16.Click Save and Run

17.Give report name – Consultant report

18.Click Save

REPORT

New Consultants Report Consultants

Outline Filters

Fields

Groups

GROUP ROWS

Add group...

Columns

Add column...

Consultant: Consultant Name X

Delivery Type X

Products X

Payment X

Payment type X

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

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

REPORT

New Consultants Report Consultants

Outline Filters

Fields

Groups

GROUP ROWS

Add group...

Payment type X

GROUP COLUMNS

Add group...

Columns

Add column...

Consultant: Consultant Name X

Delivery Type X

Products X

Payment X

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

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

Save Report

* Report Name

Consultants Report

Report Unique Name

Consultants_Report_hvb

Report Description

Folder

Private Reports

Select Folder

Cancel

Save

View Reports :

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

Task 11 : Working with dashboards :

Create Dashboard :

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

New Dashboard

* Name **3**

Consultant Dashboard

Description

Folder Private Dashboards **4**

Cancel Create

New Dashboard

* Name **3**

Consultant Dashboard

Description

Folder Private Dashboards **4**

Select Folder

Cancel Create

Select Report

Recent

Created by Me

Private Reports

Public Reports

All Reports

Folders

Created by Me

Shared with Me

All Folders

Select Report

Q Search Reports and Folders... **6**

Reports and Folders

Consultants Report **6**

Hazari Ajay Kumar - 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

