

# Cosmetics Store Management



# **ABSTRACT**

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Cosmetics Store Management in Salesforce offers a comprehensive solution for streamlining operations, enhancing customer engagement, and driving growth in the cosmetics industry. Built on the powerful Salesforce platform, this solution provides a unified platform for managing customer relationships, sales, and inventory.

By implementing this solution, cosmetics stores can:

- **Improve operational efficiency:** Streamline processes such as inventory management, order fulfillment, and customer service.
- **Enhance customer engagement:** Build stronger relationships with customers through personalized marketing campaigns and exceptional customer service.
- **Drive growth:** Gain valuable insights into customer behavior, identify new market opportunities, and increase sales.

**Key features of the Cosmetics Store Management solution include:**

- **Customer Relationship Management (CRM):** Track customer interactions, preferences, and purchase history to provide personalized experiences.
- **Salesforce Commerce Cloud:** Create a seamless online shopping experience and manage the entire sales process.
- **Inventory Management:** Track stock levels, manage purchase orders, and optimize inventory costs.
- **Marketing Automation:** Automate marketing campaigns, send personalized emails, and track customer engagement.
- **Analytics and Reporting:** Gain valuable insights into business performance and identify areas for improvement.

The Cosmetics Store Management solution is highly customizable and can be tailored to meet the specific needs of any cosmetics store. By leveraging the power of Salesforce, cosmetics stores can achieve greater operational efficiency, customer satisfaction, and business growth.

# **INDEX**

**1) Creation Salesforce Org**

**2) Object**

**3) Fields and**

**Relationship**

**4) Page Layouts**

**5)The Lightning**

**App**

**6)Profile**

**7)Setup Roles 8)Users**

**9)User Adoption 10)Import Data**

**11)What are Reports?**

**12)Dashboards**

# Creation Salesforce Org


## 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 : u\_ sername@organization.com\_\_\_\_\_



### Sign up for your Salesforce Developer Edition

A Salesforce Platform environment for free.

Complete the form to get access to the Salesforce Developer Edition.

First Name*	Last Name*
Sanskar	Chaturvedi

Email\*

skrchaturvedi1@gmail.com

Role\*

Developer

Company\*

Institute of Technology and Management Gwalior

Country/Region\*

India

State/Province\*

Madhya Pradesh

Postal Code\*

474011

Username\*

sanskar@itmngwalior.com

Your username must be in the form of an email address (it does not have to be real). It

# Object

## 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
- In 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.



The screenshot shows the Salesforce Object Manager interface. At the top, there are tabs for 'Setup', 'Home', and 'Object Manager'. The 'Object Manager' tab is selected. Below the tabs, there is a search bar with the text 'our c' and buttons for 'Schema Builder' and 'Create'. Below the search bar, there is a table with the following columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The table contains one row with the following data: LABEL: Our Customer, API NAME: Our\_Customer\_\_c, TYPE: Custom Object, DESCRIPTION: (empty), LAST MODIFIED: 23/09/2024, and DEPLOYED: (checkmark).

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Our Customer	Our_Customer__c	Custom Object		23/09/2024	✓



Search Setup

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Setup

Home

Object Manager

SETUP

Object Manager

1 Items, Sorted by Label

consult

Schema Builder

Create


LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Consultant	Consultant_c	Custom Object		23/09/2024	✓

Setup

Home

Object Manager

SETUP

Object Manager


1 Items, Sorted by Label

retail

Schema Builder

Create

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Retailer	Retailer_c	Custom Object		23/09/2024	✓



Search Setup

★


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🔔




Setup

Home

Object Manager

SETUP

Object Manager

1 Items, Sorted by Label

other

Schema Builder


Create

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
other	other_c	Custom Object		23/09/2024	✓

## Fields and Relationship

### 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

SetupHomeObject Manager

Our Customer

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Fields & Relationships

10 Items. Sorted by Field Label

Q, Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Additional Information	Additional_Information__c	Text Area(255)		
Address	Address__c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
Customer Id	Customer_id__c	Auto Number		
Customer Name	Customer_Name__c	Text(255)		
Email Id	Email_id__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Mobile Number	Mobile_Number__c	Phone		
Our Customer	Name	Text(80)		✓
Owner	OwnerId	Lookup(User,Group)		✓

## 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

	<b>Fields &amp; Relationships</b>				Q, Quick Find		New	Deleted Fields	Field Dependencies	Set History Tracking
	13 Items, Sorted by Field Label									
Details	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED					
Page Layouts	Address	Address_c	Long Text Area(32768)							
Lightning Record Pages	Consultants	Name	Text(80)					✓		
Buttons, Links, and Actions	Created By	CreatedById	Lookup(User)							
Compact Layouts	Customer details	Customer_details_c	Lookup(Our Customer)					✓		
Field Sets	Customer id	Customer_id_c	Auto Number							
Object Limits	Customer Name	Customer_Name__c	Text(255)							
Record Types	Delivery Type	Delivery_Type_c	Picklist							
Related Lookup Filters	Email id	Email_c	Email							
Search Layouts	Last Modified By	LastModifiedById	Lookup(User)							
List View Button Layout	Mobile Number	Mobile_Number__c	Phone							
Restriction Rules	Owner	OwnerId	Lookup(User,Group)					✓		
Scoping Rules	Payment	Payment_c	Picklist							
Triggers	Products	Products_c	Picklist (Multi-Select)							

## 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)

Setup
Home
Object Manager

**Retailer**

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Triggers
Flow Triggers

Fields & Relationships

11 Items. Sorted by Field Label

Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Customer Details	Customer_Details__c	Master-Detail(Our Customer)		✓
Customer id	Customer_id__c	Auto Number		
Customer Name	Customer_Name__c	Text(255)		
Delivery Type	Delivery_Type__c	Picklist		
Email id	Email_id__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Mobile Number	Mobile_Number__c	Phone		
Payment	Payment__c	Picklist		
Products	Products__c	Picklist (Multi-Select)		
Retailers	Name	Text(80)		✓

## 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

[Setup](#)
[Home](#)
[Object Manager](#)

SETUP > OBJECT MANAGER

other

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

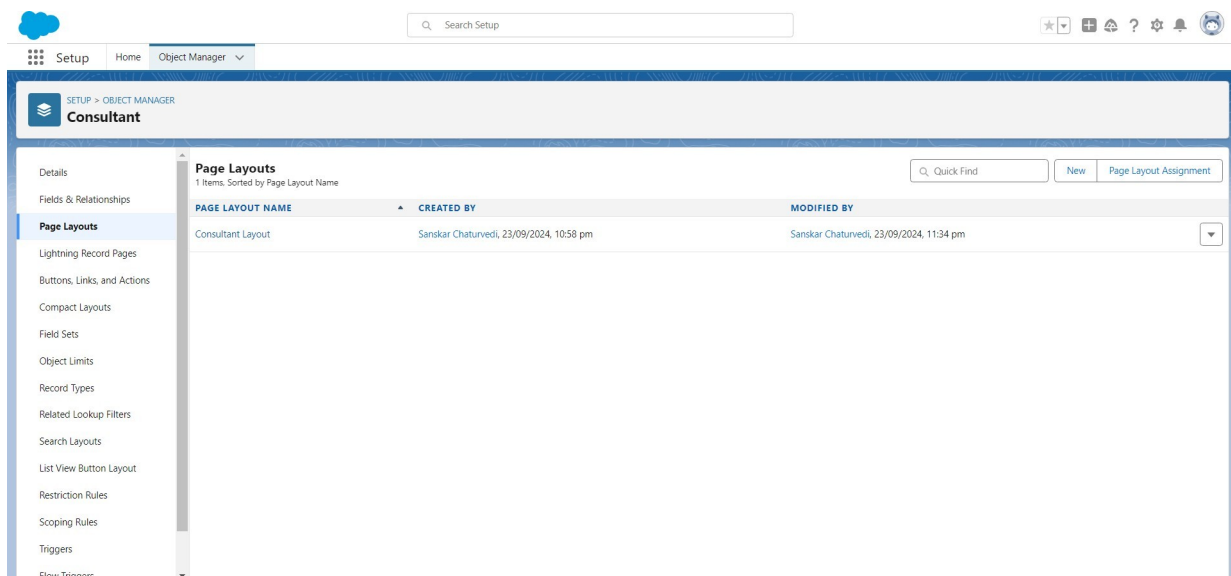
Fields & Relationships

8 Items. Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Coupon	Coupon__c	Text(255)		<input type="checkbox"/>
Created By	CreatedById	Lookup(User)		<input type="checkbox"/>
Employee	Employee__c	Picklist		<input type="checkbox"/>
Last Modified By	LastModifiedById	Lookup(User)		<input type="checkbox"/>
Name	Name__c	Text(255)		<input type="checkbox"/>
others	Name	Text(80)		<input checked="" type="checkbox"/>
Owner	OwnerId	Lookup(User,Group)		<input checked="" type="checkbox"/>
Products	Products__c	Picklist (Multi-Select)		<input type="checkbox"/>

# Page Layouts

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



The screenshot shows the Salesforce Setup interface. At the top, there's a navigation bar with "Setup", "Home", and "Object Manager" tabs. A search bar labeled "Search Setup" is on the right. Below the navigation bar, the "Consultant" object is selected. The left sidebar lists various setup options, with "Page Layouts" highlighted. The main content area displays the "Page Layouts" for the "Consultant" object, showing a table with one item: "Consultant Layout". The table has columns for "PAGE LAYOUT NAME", "CREATED BY", and "MODIFIED BY".

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Consultant Layout	Sanskar Chaturvedi, 23/09/2024, 10:58 pm	Sanskar Chaturvedi, 23/09/2024, 11:34 pm



# 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: Select the items (Our Customers, Consultants, Retailers, Others, Reports, Dashboards ) from the search bar and move it using the arrow button --> Next.
- To Add User Profiles: Search profiles (System administrator) in the search bar --> click on the

instituteoftechnologyand-a2-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

Search Setup

urban

1/2

Setup Home Object Manager

app manager

Apps

App Manager

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

SETUP Lightning Experience App Manager

New Lightning App New Connected App

23 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

App Name ↑	Developer Name	Description	Last Modified Date	App Type	Visible L...
7 Content	Content	Salesforce CRM Content	23/09/2024, 9:44 pm	Classic	✓
8 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	23/09/2024, 9:44 pm	Lightning	✓
9 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	23/09/2024, 9:44 pm	Lightning	✓
10 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	23/09/2024, 9:44 pm	Lightning	✓
11 Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	23/09/2024, 9:44 pm	Classic	✓
12 Platform	Platform	The fundamental Lightning Platform	23/09/2024, 9:44 pm	Classic	✓
13 Queue Management	QueueManagement	Create and manage queues for your business.	23/09/2024, 9:44 pm	Lightning	✓
14 Sales	Sales	The world's most popular sales force automation (SFA) solution	23/09/2024, 9:44 pm	Classic	✓
15 Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	23/09/2024, 9:44 pm	Lightning	✓
16 Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one screen	23/09/2024, 9:44 pm	Lightning	✓
17 Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and feeds	23/09/2024, 9:44 pm	Classic	✓
18 Salesforce Scheduler Setup	LightningScheduler	Set up personalized appointment scheduling.	23/09/2024, 9:45 pm	Lightning	✓
19 Service	Service	Manage customer service with accounts, contacts, cases, and more	23/09/2024, 9:44 pm	Classic	✓
20 Service Console	LightningService	(Lightning Experience) Lets support agents work with multiple records across custo...	23/09/2024, 9:44 pm	Lightning	✓
21 Site.com	Sites	Build pixel-perfect, data-rich websites using the drag-and-drop Site.com application...	23/09/2024, 9:44 pm	Classic	✓
22 Subscription Management	RevenueCloudConsole	Get started automating your revenue processes	23/09/2024, 9:44 pm	Lightning	✓
23 Urban Color	Urban_Color		23/09/2024, 11:37 pm	Lightning	✓

# Profile

## 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.

## Second User Creation

1. From Setup, in the Quick Find box, enter Users, and then select Users.Click New User.
2. 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.
3. Select a Role(Billing Operator)
4. Select a User Licence As Salesforce Platform.
5. Select a profile as Billing Operator.
6. Check Generate new password and notify the user immediately to have the user's login name and a temporary password emailed to your email.

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



# User Adoption

## 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

## 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 Custom

## 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.



Urban Color

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Our Customers

Consultants

Retailers

others

Reports

Dashboards

Our Customers

Recently Viewed

2 items • Updated a few seconds ago

New

Import

Change Owner

Assign Label

⚙

📄

🔄

✎

🗑

⌵

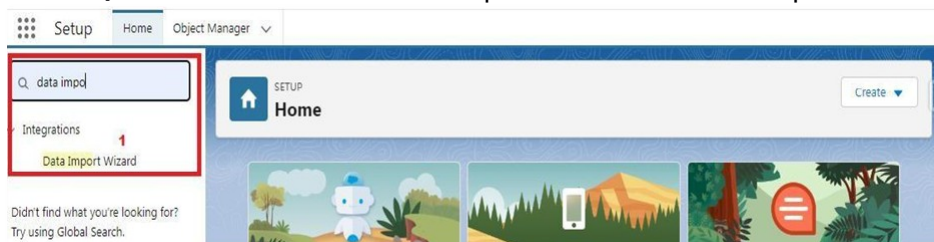
[https://instituteoftechnologyand-a2-dev-ed.develop.lightning.force.com/lightning/o/Consultant\\_c/home](https://instituteoftechnologyand-a2-dev-ed.develop.lightning.force.com/lightning/o/Consultant_c/home)

# Import Data

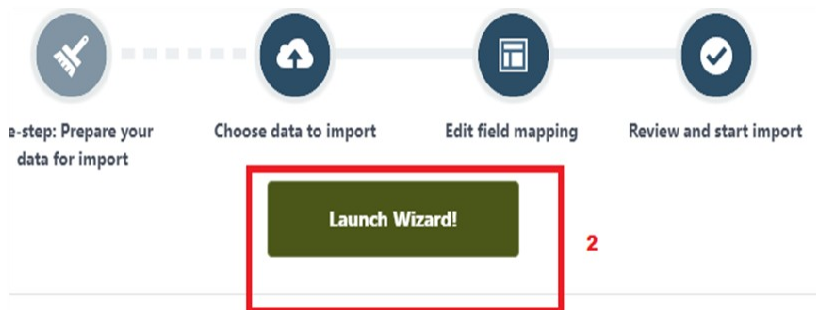
Data Import Wizard—this tool, accessible through the Setup menu, lets you import data in common standard objects, such as contacts, leads, accounts, as well as data in custom objects.

## To Import Data

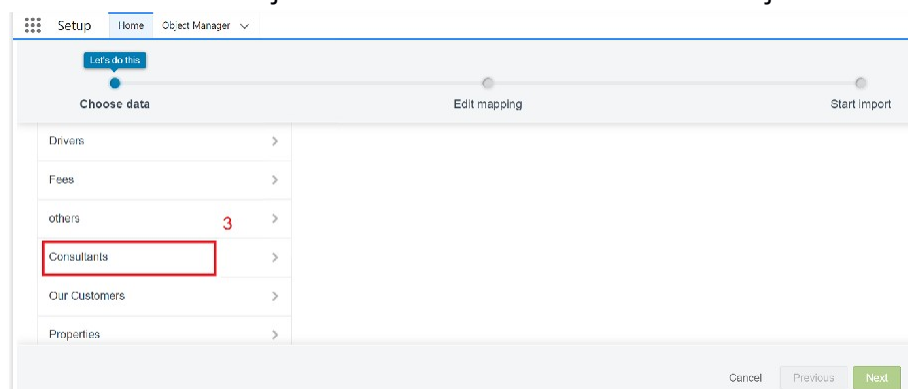
1. From Setup, click the Home tab.
2. In the Quick Find box, enter Data Import and select Data Import Wizard



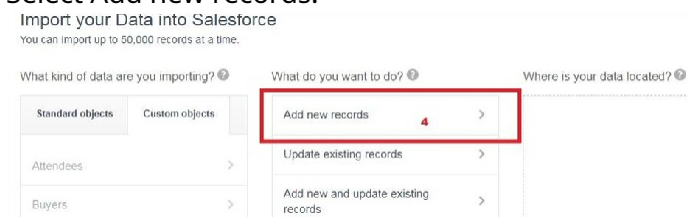
3. Click Launch Wizard!



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



5. Select Add new records.



6. Click CSV and choose file Consultant\_CSV which we made earlier. Click Next.

Since the field names in the

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? ☐

Drag CSV file here to upload

CSV

5

Cancel | Previous | Next

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

Choose data | Edit mapping | Start import

Edit Field Mapping: Consultants

Field	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	Consultant Name	Consultant Name	Don Dag	Aditi	Bibbi
Change	Mobile Number	Mobile Number	99999732	798023873	902004539
Change	Delivery Type	Delivery Type	Self Pickup	Courier	Self Pickup
Change	Address	Address		Hyderabad	
Change	Products	Products	1 pack	Complete	Face Pack
Change	Payment	Payment	Cash	Upi	Credit Card
Change	Email	Email	aditi@gmail.com		Bibbi34@gmail.com

Cancel | Previous | Next

7. 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 details and click Start Import.

Your selection:

- Consultants
- Add new records
- Consultants - Sheet (1 row)

Your import will include:

Mapped fields: 7

Unmapped fields: 0

Cancel | Previous | Start Import

8. 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

9. 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
<a href="#">View Request</a>	<a href="#">View Result</a>	7512w0000CQxqr	6/19/2023, 11:05 PM	6/19/2023, 11:05 PM	103	52	0	9	0	0		Completed

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

**Note** - Do Field mapping carefully.

## What are Reports?

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



# 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

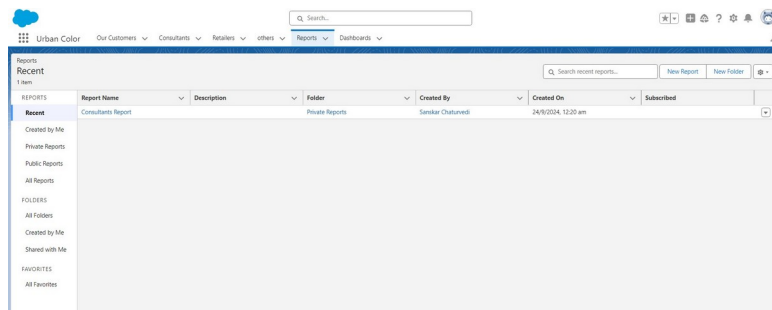
9.Click on Add Bucket and name it as

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.

# Dashboards

