Cosmetics Store Management Solution For Urban Color in Salesforce

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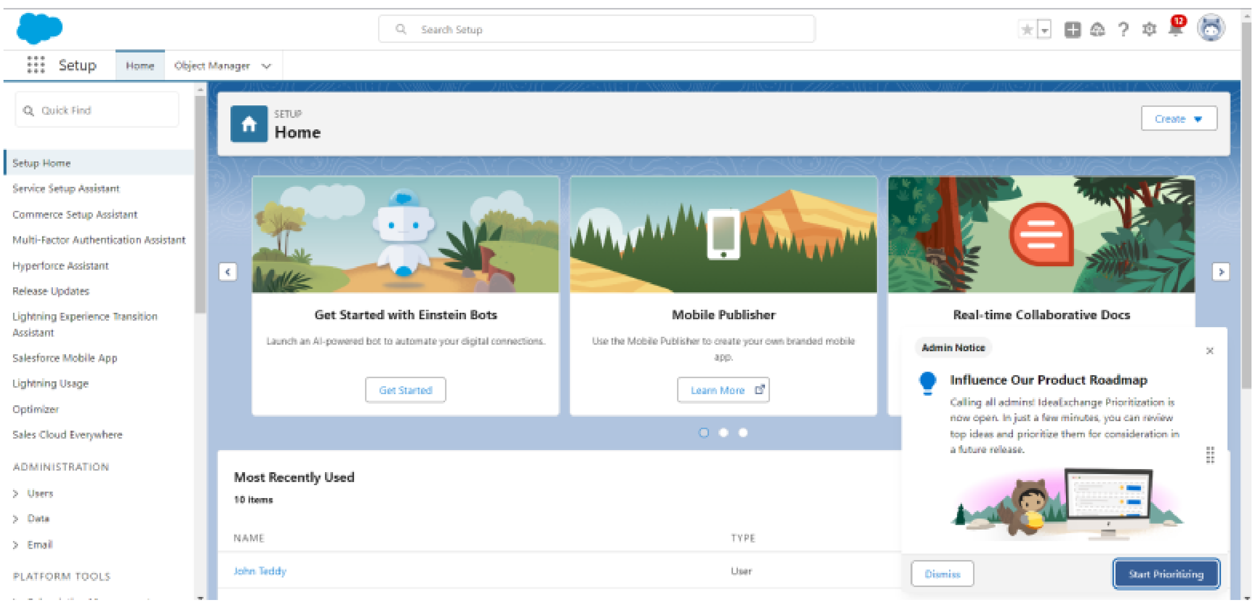
ABSTRACT:

The Cosmetics Store Management Solution, built on the Salesforce platform, is designed to streamline the operations of cosmetics retailers by providing an integrated system for managing customer relationships, sales, and inventory. This solution offers cosmetics stores a scalable and robust platform to optimize key operational processes, enhance customer engagement, and drive business growth.
By utilizing Salesforce's powerful CRM and cloud capabilities, cosmetics stores can better track customer preferences, manage sales cycles, and ensure that inventory is efficiently controlled. This platform allows for improved operational efficiency, automated workflows, and personalized marketing, empowering stores to deliver superior customer experiences and maximize revenue opportunities.

1. Creation of Salesforce Org

To begin managing your cosmetics store operations, you'll first need to create a Salesforce organization (Org). Follow these steps to create your Org:
1.Visit Salesforce.com and sign up for a new organization.
2.Select a license type (Salesforce Enterprise or Professional is recommended).
3.Complete the sign up process and verify your email address.
4.Configure the basic settings for your new Org, such as company information, locale, and time zone.
5.Once the Org is created, you will have access to the Salesforce platform and can begin customizing it for store management.

after login it reflects the home page of Salesforce:



2. Objects

Objects in Salesforce represent database tables that store specific data. For the Cosmetics Store Management Solution, custom objects may include:

●Products: Stores product details such as name, SKU, price, and category.

●Customers: Tracks customer information such as contact details, preferences, and purchase history.

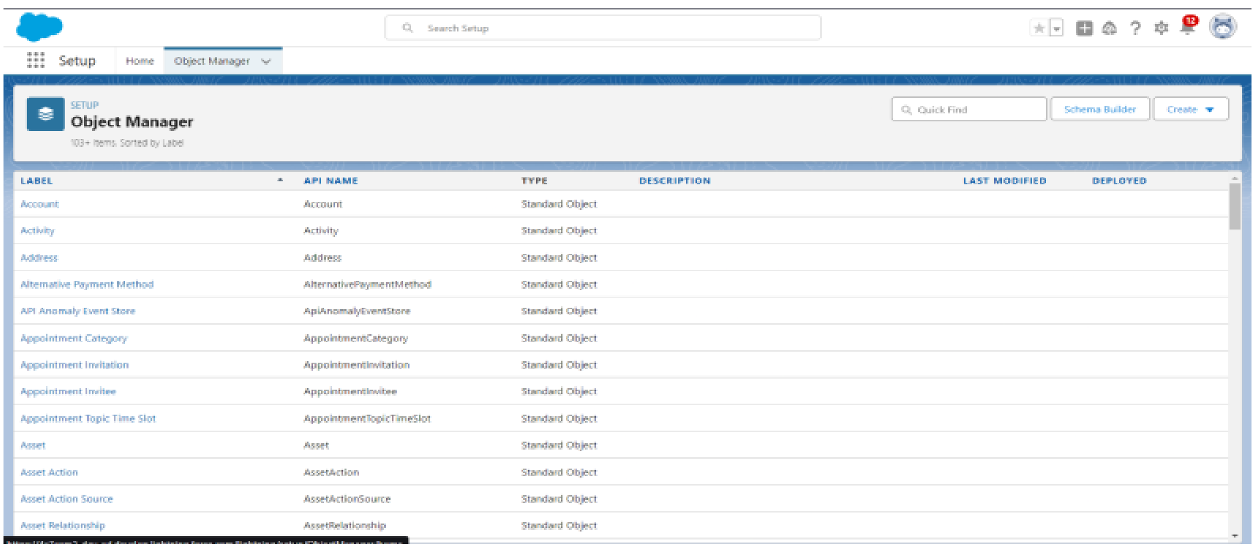
●Orders: Manages customer orders, including products purchased, quantities, and sales amounts.●Inventory: Keeps track of stock levels and reorder points.

●Marketing Campaigns: Organizes marketing initiatives and customer engagement efforts.

You can create these objects by navigating to Setup > Object Manager > Create Object.
here we create three objects namely

1) Customer Object
2) Retailer Object
3) Other Object

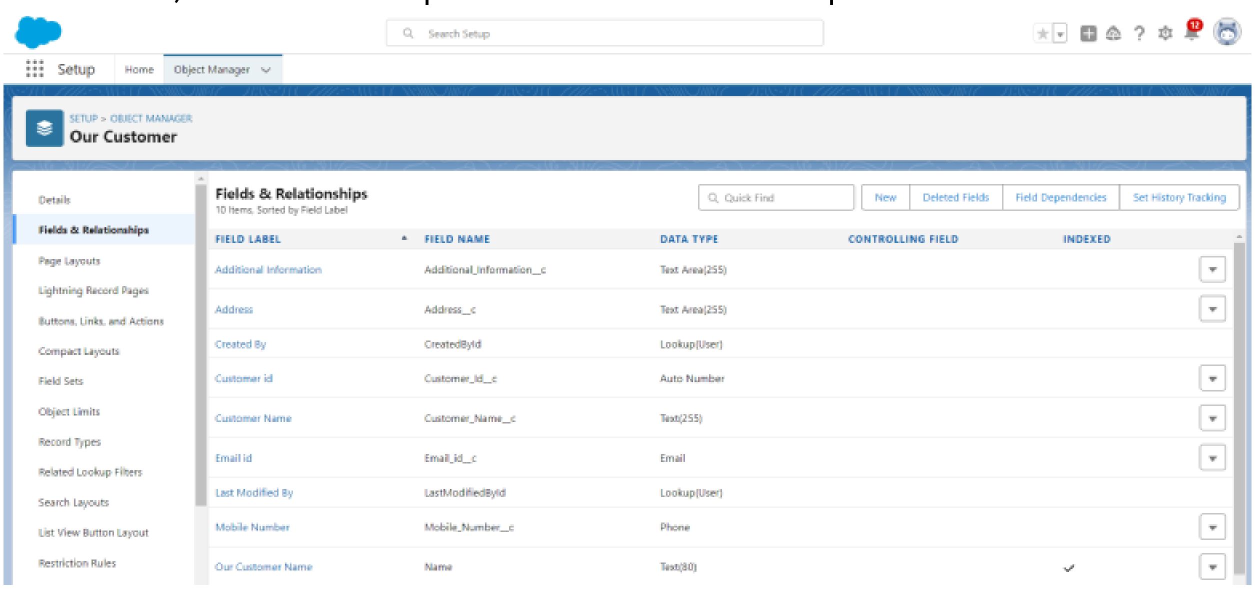
these objects are available in object manager tab in setup:



3. Fields and Relationships

Fields store individual pieces of data within an object. For example:
●Products: Fields like Name, Price, Quantity in Stock, and Expiration Date.
●Customers: Fields like Full Name, Email, Phone, and Loyalty Program.
●Orders: Fields like Order Date, Product ID, Quantity, and Total Amount.
Salesforce supports relationships between objects, including:
●Lookup Relationships: Link objects like Customers and Orders.
●Master-Detail Relationships: Used for objects that are tightly coupled, such as Products and Orders.
To manage fields and relationships, go to Setup > Object Manager > [Select Object] > Fields & Relationships.

in this section we will create fields in different objects like Our Customers, retailers, Consultants, Other in their respective fields and relationships section



fields added to Our Customer Object are

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 added to Consultants object are:

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	

Fields added to Retailers Objects are:

	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 added to Others Object are:

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

Page layouts control the design and organization of data entry pages for different objects. You can customize which fields, related lists, and buttons appear on the object record page.

Steps to customize page layouts:

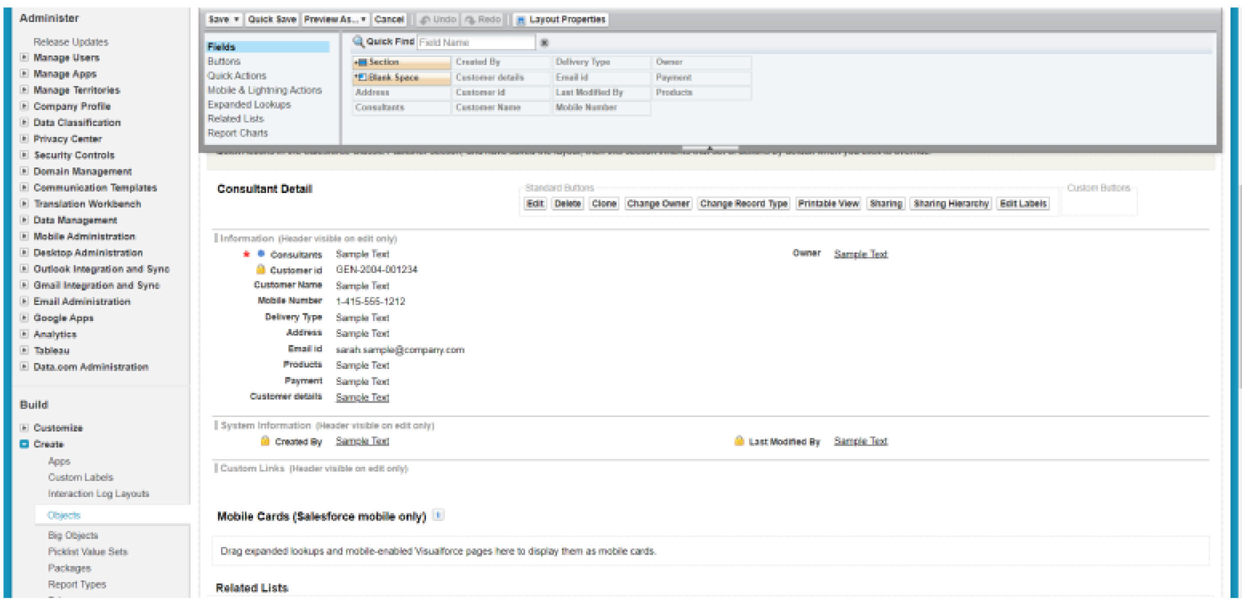
1.Go to Setup > Object Manager > [Select Object] > Page Layouts.

2.Edit an existing layout or create a new one.

3.Drag and drop fields, related lists, and custom components to design the layout.

4.Assign different layouts to profiles based on user roles (e.g., Store Manager, Sales Staff).

here we created the consultant page layout



here I made sure that all arrangements are in order

5. The Lightning App

Salesforce Lightning Apps provide users with an efficient and visually intuitive interface to access various objects and features.

To create a custom Lightning App for Cosmetics Store Management:

1.Go to Setup > App Manager > New Lightning App.

2.Name the app (e.g., "Cosmetics Store Manager") and configure the branding, including the app logo.

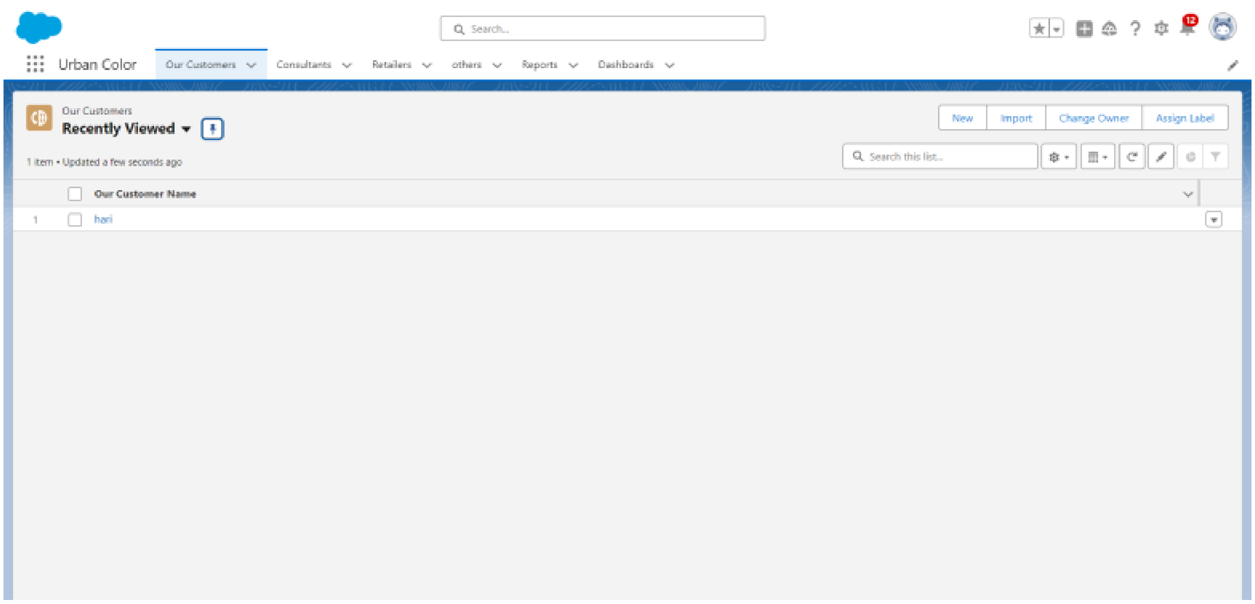
3.Add navigation items like Products, Orders, Customers, and Inventory.

4.Assign the app to specific user profiles.

5.Save and activate the app.

here we created the lightning app with required objects for our application such as Our Customers, Retailers, Consultants, Others and make sure that reports and dashboards are added to navigation bar of our urban color application

the layout of the urban color application is as below



6. Profile

Profiles in Salesforce control user permissions and access to data. Common profiles in the Cosmetics Store Management solution include:

●System Administrator: Full access to all objects and settings.

●Store Manager: Access to manage sales, inventory, and customer data.

●Sales Staff: Limited access to sales and customer information.

Steps to customize profiles:

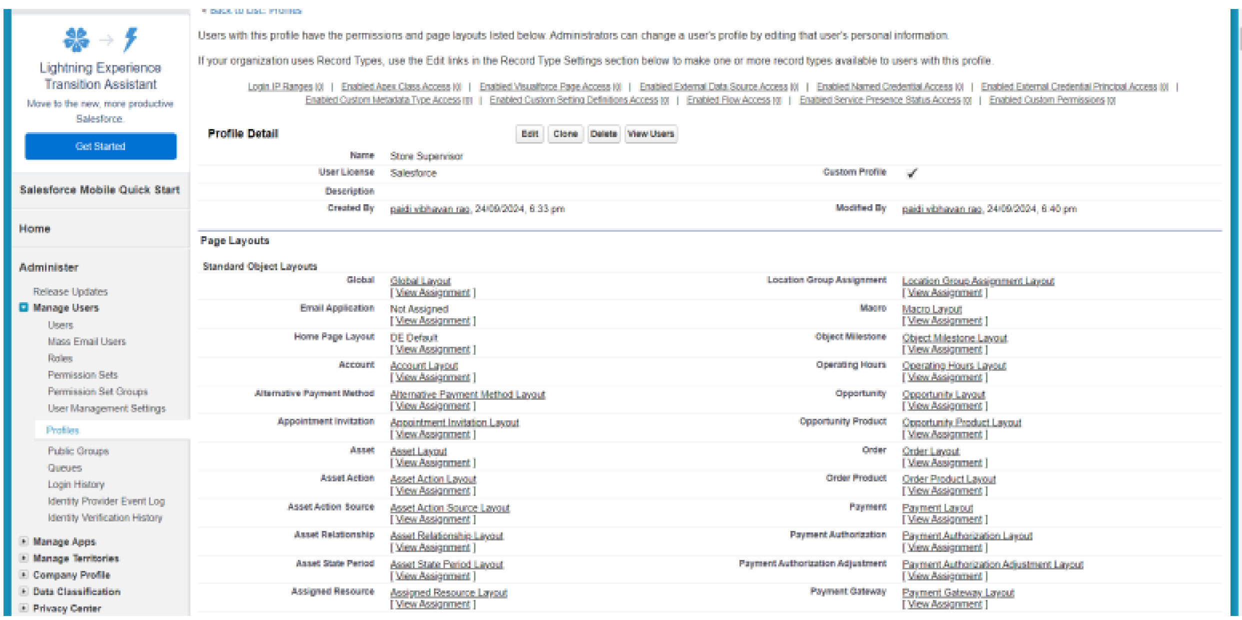
1.Go to Setup > Profiles.

2.Select an existing profile or create a new one.

3.Configure object permissions, field-level security, and record types.

4.Assign users to the profile.

here we create a store supervisor profile under ceo role and give create, read, update, delete ,modify all permissions for objects such as Consultant, Retailers, Our Customers, Others



7. Setup Roles

Roles define the hierarchy and data-sharing rules in Salesforce. Users higher in the role hierarchy automatically get access to data owned by users below them.

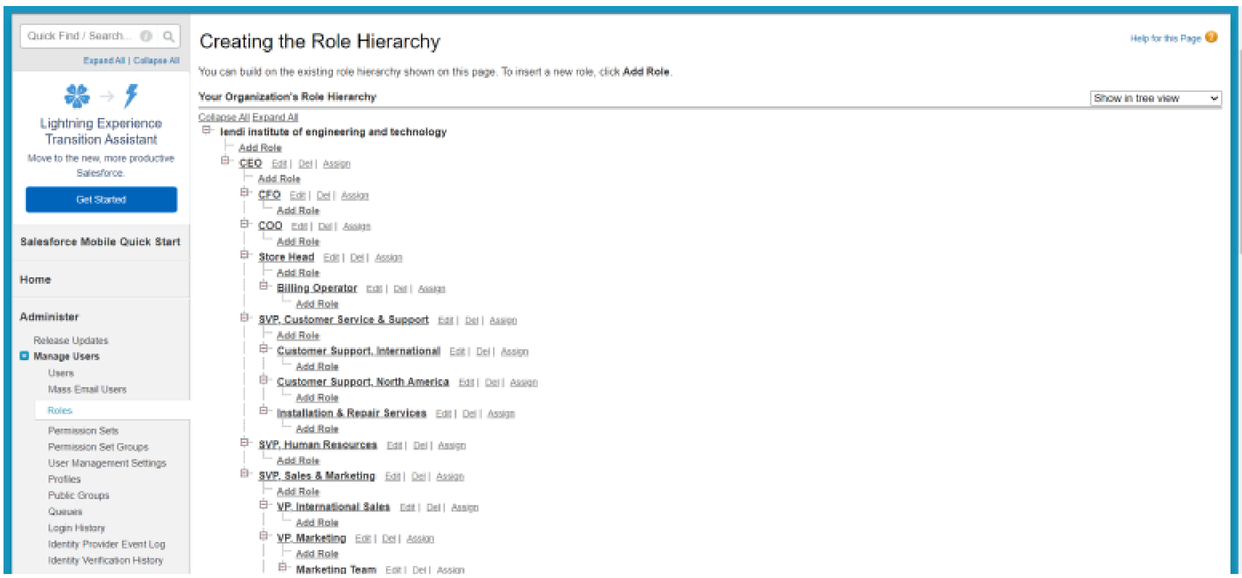
Steps to configure roles:

1.Go to Setup > Roles > Set Up Roles.

2.Define the role hierarchy (e.g., Store Manager > Sales Staff).

3.Assign roles to users to ensure proper data visibility and sharing.

here we setup roles of the profiles created as billing operator and store head
and save the roles



8. Users

Users represent the individuals who access the Salesforce Org. To create or manage users:

1.Go to Setup > Users > New User.
2.Enter user details like name, email, role, and profile.
3.Assign licenses and ensure users are mapped to the correct roles and profiles.
4.Click Save and the new user will receive a welcome email to log in.

here we created the users who can access our application....

9. User Adoption

User adoption is key to the success of any Salesforce implementation. Tips to ensure high adoption rates:

●Provide regular training sessions for store staff on using the solution.
●Offer quick reference guides and resources for troubleshooting.
●Utilize Salesforce's in-app guidance and help tools to guide users through processes.
●Reward users for milestones achieved in using the system effectively.

here records are created for users to access the information and we can know how to access records and delete and create records.

10. Import Data

To populate your Salesforce Org with existing data from your cosmetics store, you can use tools like Data Import Wizard or Data Loader.

Steps for importing data:

1.Prepare your data in CSV format with columns matching Salesforce fields.
2.Go to Setup > Data Import Wizard or use Data Loader for bulk imports.
3.Map your CSV fields to the appropriate Salesforce fields.
4.Complete the import process and verify data accuracy in the system.

data is entered into the records using CSV files

11. What Are Reports?

Reports in Salesforce provide insights into store operations, sales performance, and customer behavior. To create a report:

1.Go to Reports > New Report.

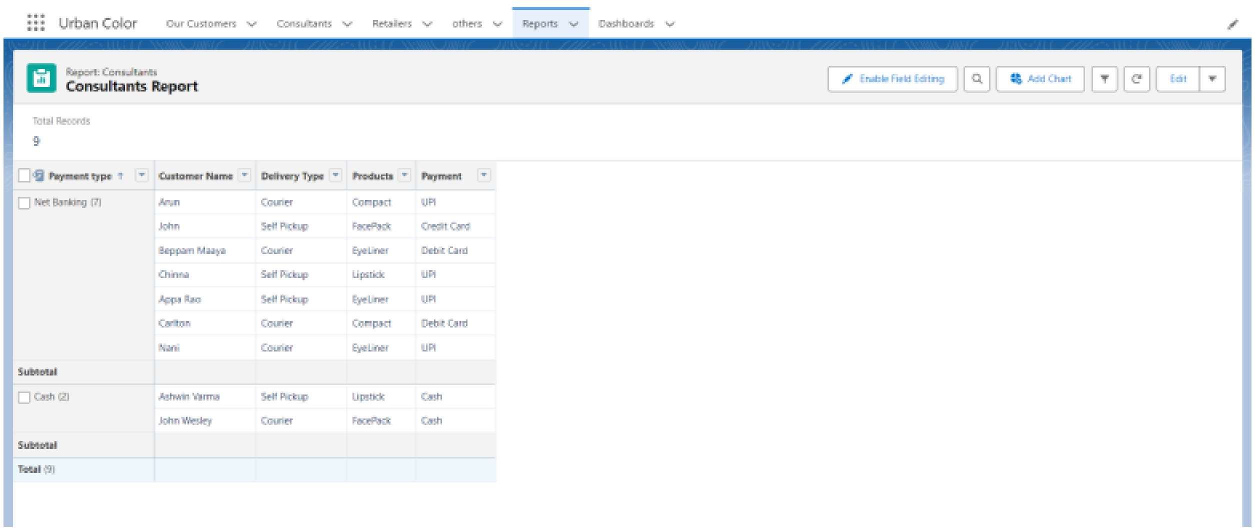
2.Select the appropriate report type (e.g., Products, Orders, Customers).

3.Add filters, groupings, and custom fields as needed.

4.Save and run the report to analyze your data.

5.Schedule reports for regular delivery to key stakeholders.

now we will create a report based on the records we have,and perform required operation to bucket some fields of the data and maintain in the table



These reports are available in the urban color application we created

12. Dashboards

Dashboards offer a visual representation of key metrics and performance indicators in your cosmetics store. Steps to create a dashboard:

1.Go to Dashboards > New Dashboard.

2.Name the dashboard (e.g., "Store Performance Overview").

3.Add components like charts, graphs, and metrics from your reports.

4.Customize the layout and display options.

5.Save and share the dashboard with relevant users or teams.

we can create the dashboards based on reports we have and records here we use consultant report to create a consultant dashboard here there are different types of dashboards.