COSMETICS STORE MANAGEMENT

The Cosmetics Store Management application in Salesforce is expertly crafted to enhance the operational capabilities of beauty retailers. Leveraging the robust and scalable nature of the Salesforce platform, this solution simplifies the oversight of customer relationships, sales workflows, and inventory management. By adopting this application, cosmetics retailers can significantly improve their operational efficiency, boost customer engagement, and promote sustainable business growth and Adaptability.

The solution involves three primary user groups: retailers, consultants, and customers, each benefiting from specialized layouts, graphs, and charts that present data in a clear and actionable manner. Reports are generated through data imports, providing insights that drive informed decision-making.

➤ KEY FEATURES:

1. **Customer Management:**
   - **Contacts & Accounts:** Efficiently organize customer information, including contact details, purchase history, and preferences.
   - **Customer Segmentation:** Classify customers based on criteria such as buying frequency, product preferences, and geographical location for targeted marketing initiatives.
2. **Product Management:**
   - **Product Catalog:** Keep an updated inventory of cosmetic products, complete with detailed descriptions, pricing, and availability status.
   - **Inventory Tracking:** Monitor stock levels, set reorder thresholds, and track inventory turnover to maintain optimal stock.
3. **Sales Management:**
   - **Order Processing:** Streamline the order management lifecycle, from creation and status tracking to invoicing.
   - **Sales Analytics:** Utilize reports and dashboards to assess sales trends, pinpoint top-selling items, and predict future sales performance.

4. **Marketing & Promotions:**
   - **Campaign Management:** Develop and oversee marketing campaigns, including email promotions, discounts, and exclusive offers.
   - **Customer Engagement:** Harness Salesforce tools to connect with customers through personalized offers and targeted marketing strategies.
5. **Customer Service:**
   - **Case Management:** Efficiently track and resolve customer service inquiries and complaints.
   - **Knowledge Base:** Offer customers access to a self-service portal featuring FAQs, product information, and troubleshooting assistance.
6. **Integration & Automation:**
   - **Salesforce Integration:** Seamlessly integrate with other systems such as ERP or e-commerce platforms to facilitate a smooth data flow.
   - **Workflow Automation:** Automate repetitive tasks and processes to enhance operational efficiency and minimize manual errors.

➤ TASKS :

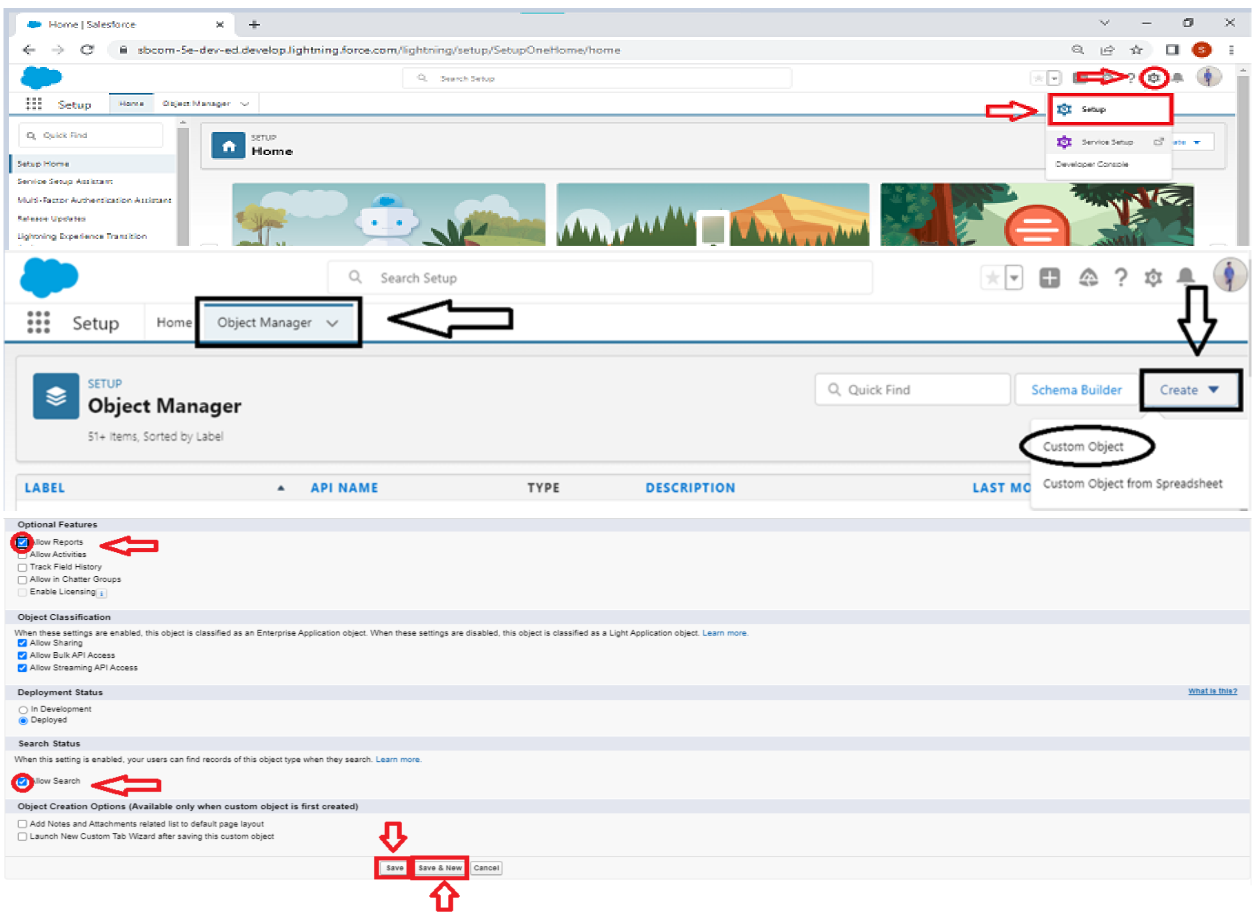
TASK 1. Creation of Objects for Urban Color :

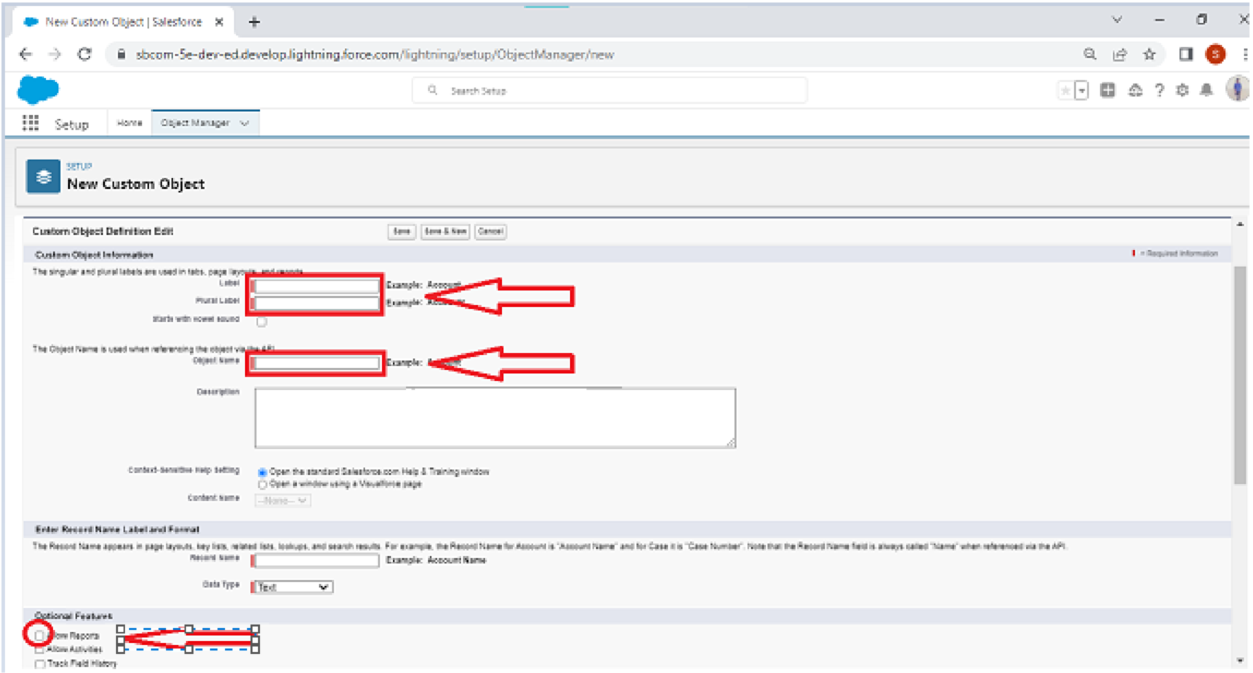
For this Urban Color we need to create 3 objects

- 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 namedOur Customer, Consultant, Retailer, Others.

For creating the another 3 objects, we need to follow the same procedure as how we created the Customers object.

TASK 2. Creation of Fields and Relationships :

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

Fields in Our Customers objects:

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 Our Consultants objects:

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

Fields in Retailers objects:

S No	Field Label	Data Type
1	Customer id	Auto Number
2	Customer Name	Text
3	Mobile Number	Phone
4	Email id	Email
5	Delivery Type 1)Self Pickup 2)Courier	Picklist
6	Products 1)Lipstick 2)Compact 3)EyeLiner 4)FacePack 5)Lip Balm	Multi-Picklist

	6)Nail Polish	
7	Payment 1)Debit Card 2)Credit Card 3)UPI 4)Cash	Picklist
8	Customer Details	Master-Detail Relationship (Our Customers Object)

Fields in Others objects:

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.

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

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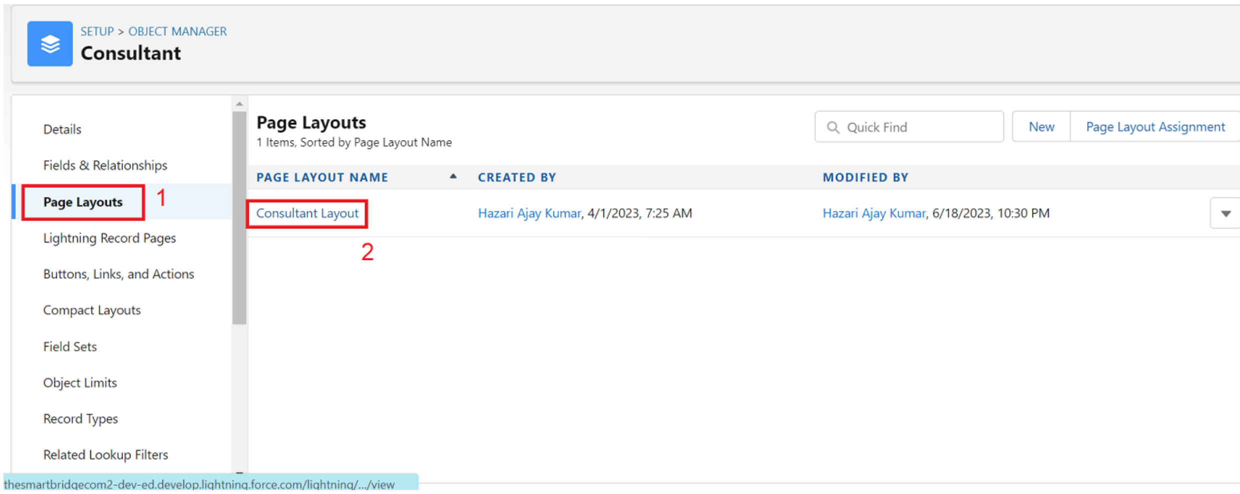
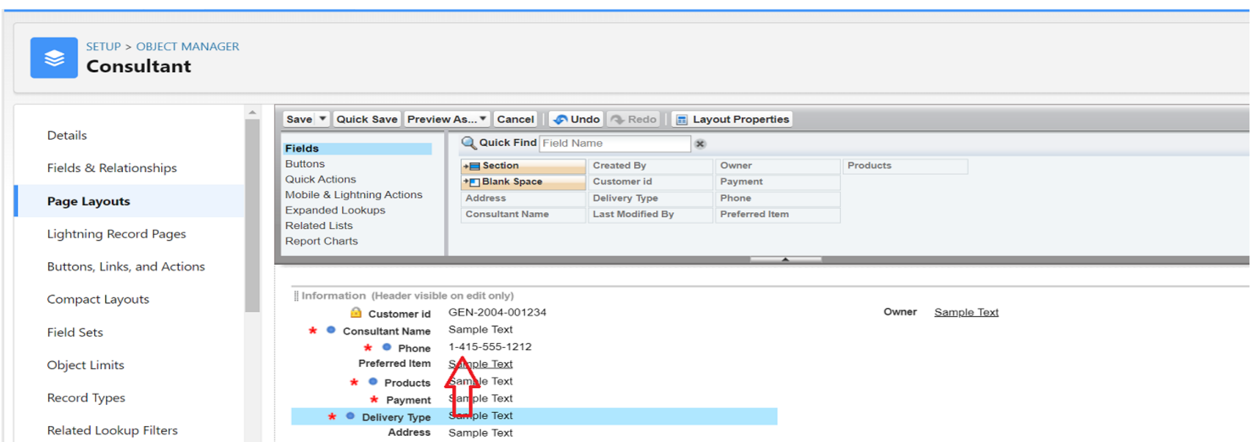


- Click And Drag Delivery type and Address Fields Below Phone field.
- Then Click on Save.



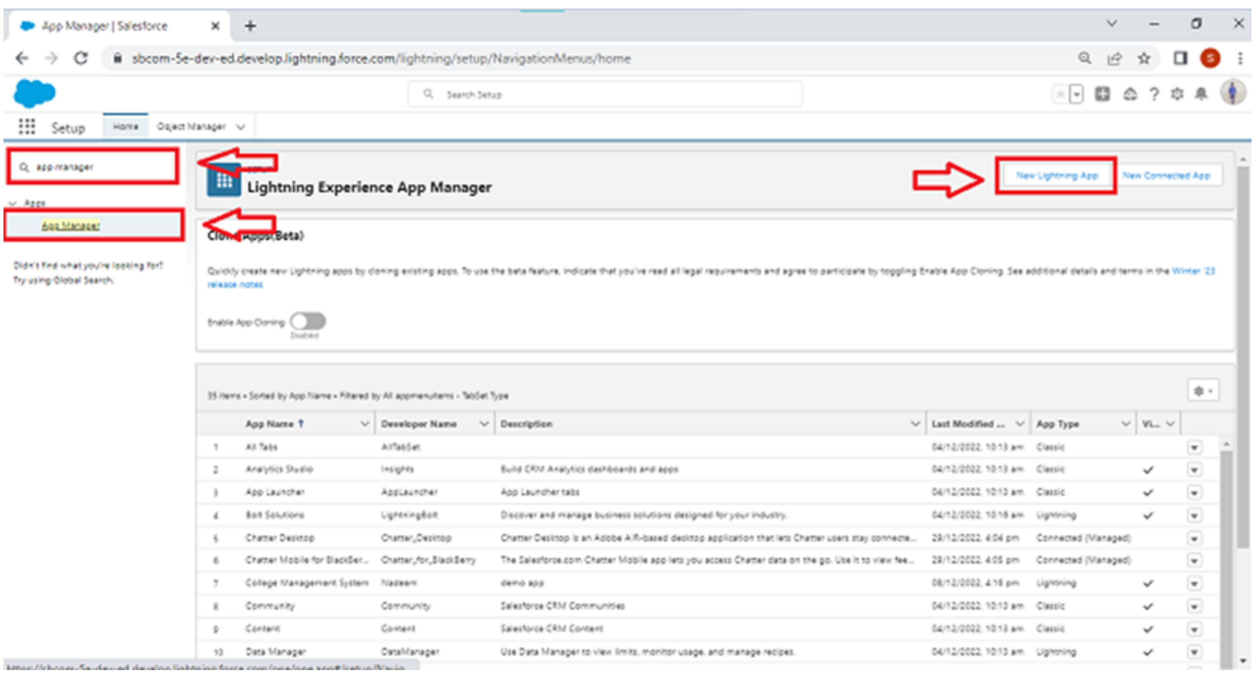
Creating a page layout in Salesforce involves navigating to the object manager, selecting the relevant object, and either creating a new layout or editing an existing one. You can design layout by dragging and dropping fields, adding sections and related lists, and including buttons or links as needed. Customize field properties and section settings to suit user needs, then save and assign the layout is do.

TASK 4. Creation of 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.

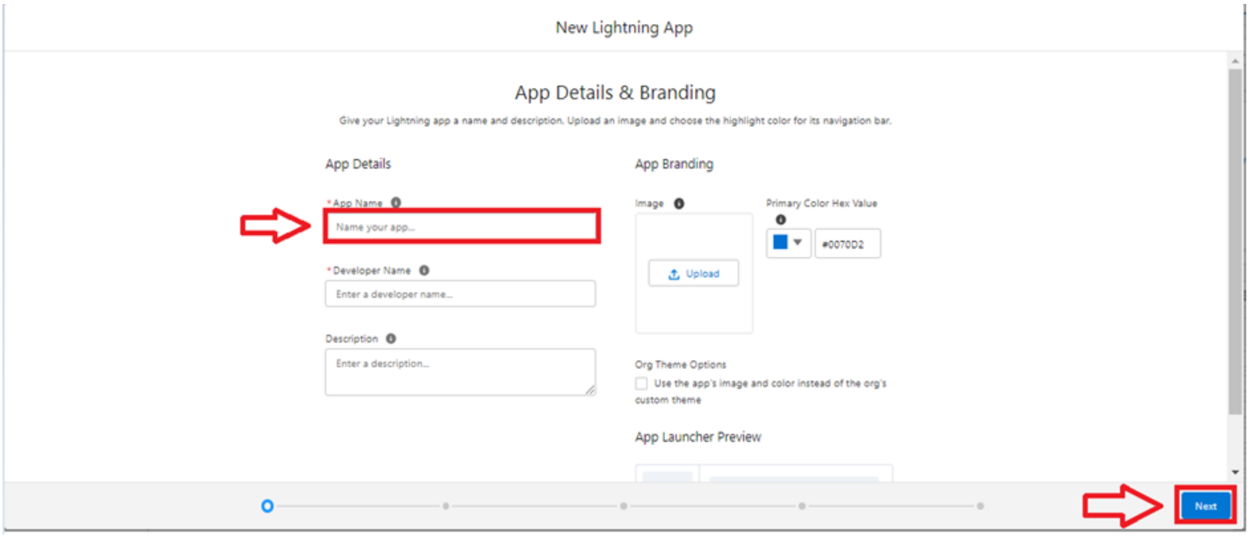
To Create a Lightning app page :

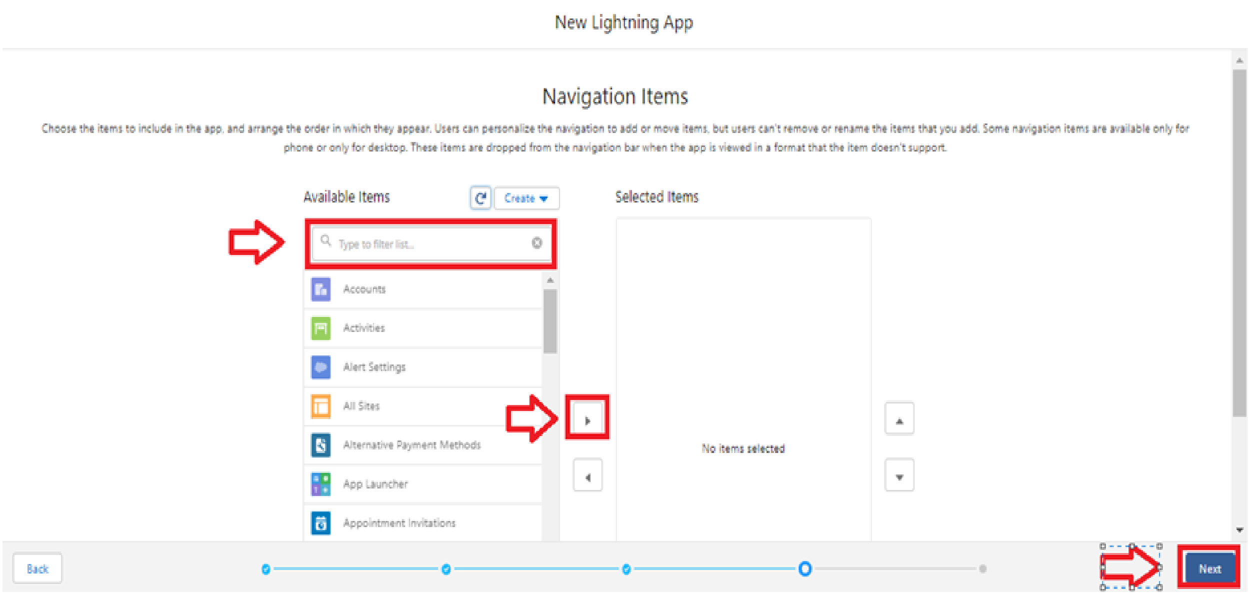
- Go to setup page --> search “app manager” in quick find --> select “app manager” --> click on New lightning App.

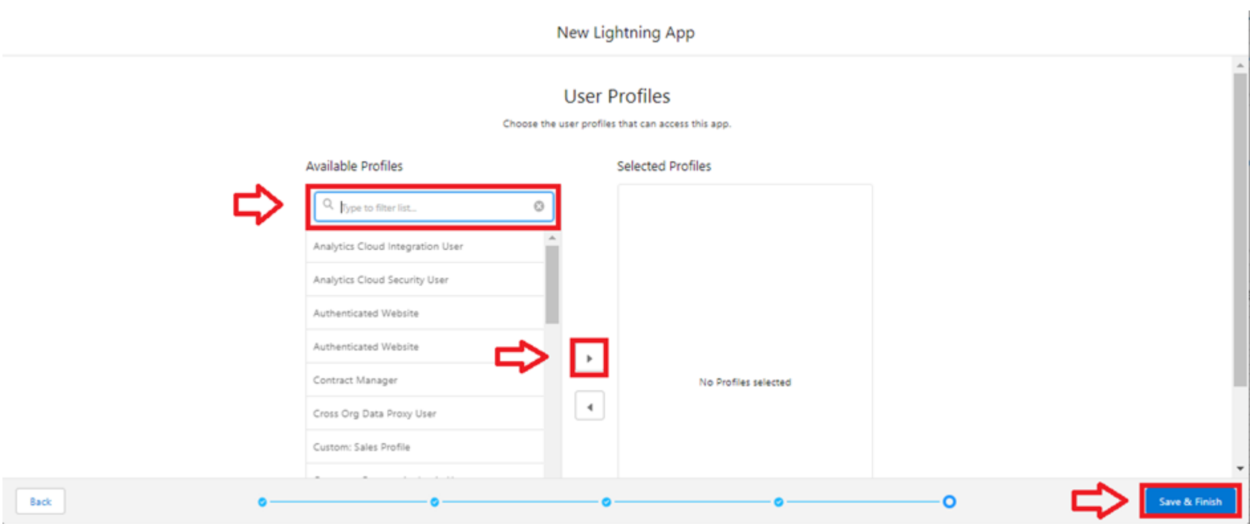


- Fill the app name as Urban Color in app details and branding --> Next --> (App option page) keep it as default --> Next --> (Utility Items) keep it as default --> Next.

- 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 arrow button --> save & finish.


New Lightning App
App Details & Branding
Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.
App Details
App Branding
* App Name
Name your app...
Image
Primary Color Hex Value
Upload
#0070D2
* Developer Name
Enter a developer name...
Description
Enter a description...
Org Theme Options
Use the app's image and color instead of the org's custom theme
App Launcher Preview
Next


New Lightning App
Navigation Items
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.
Available Items
Create
Selected Items
Type to filter list...
Accounts
Activities
Alert Settings
All Sites
Alternative Payment Methods
App Launcher
Appointment Invitations
No items selected
Back
Next


New Lightning App
User Profiles
Choose the user profiles that can access this app.
Available Profiles
Selected Profiles
Type to filter list...
Analytics Cloud Integration User
Analytics Cloud Security User
Authenticated Website
Authenticated Website
Contract Manager
Cross Org Data Proxy User
Custom: Sales Profile
No Profiles selected
Back
Save & Finish

TASK 5. Creating Profiles :

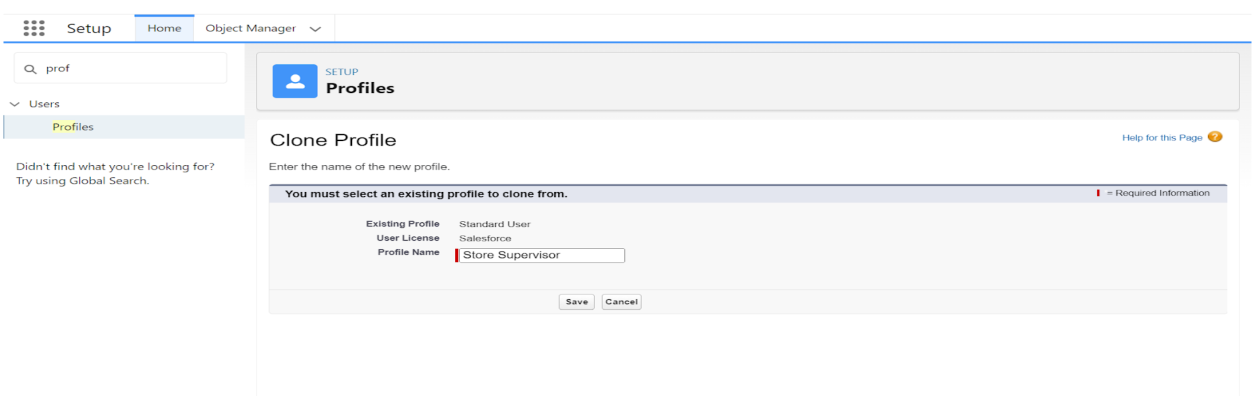
A profile is a group/collection of settings and permissions that define what a user can do in salesforce. A profile controls "Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login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

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

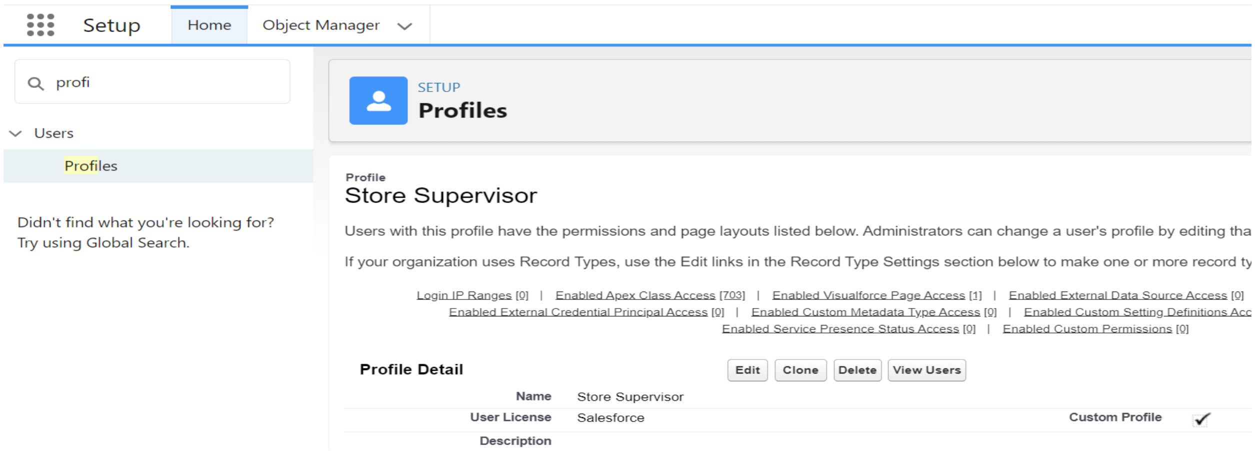
- From Setup enter Profiles in the Quick Find box, and select Profiles.
- From the list of profiles, find Standard User.
- Click Clone.
- For Profile Name, enter Store Supervisor.
- Click Save.
- While still on the Store Supervisor profile page, then click Edit.
- Scroll down to Custom Object Permissions 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.

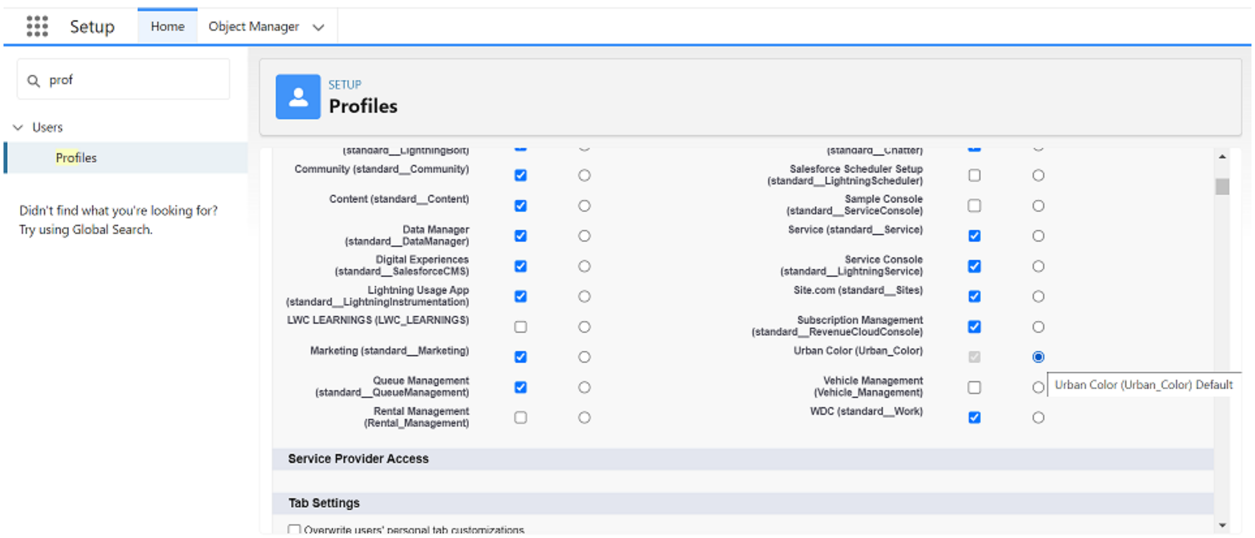
To create a new profile:

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.

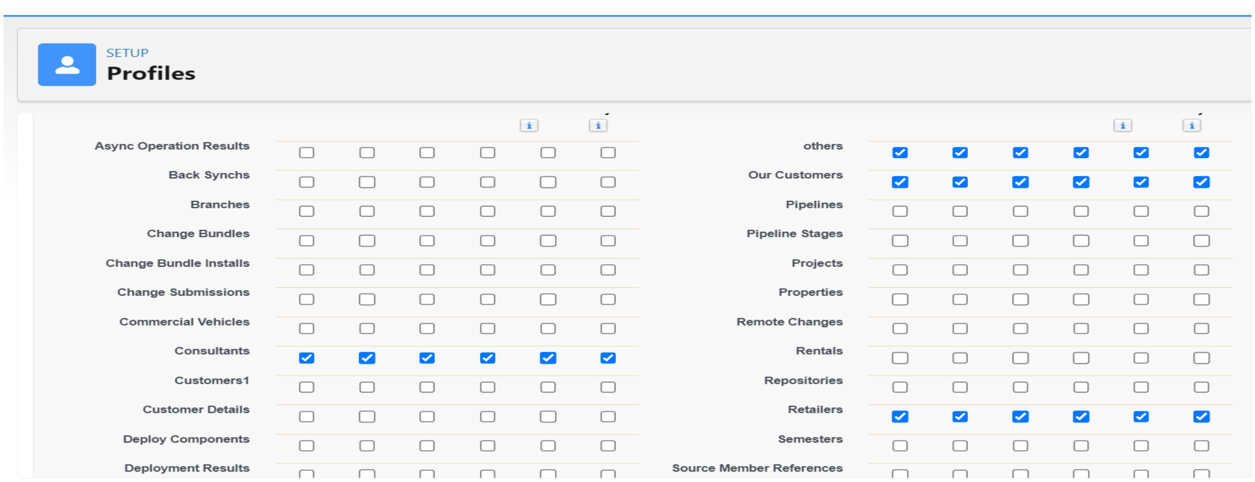


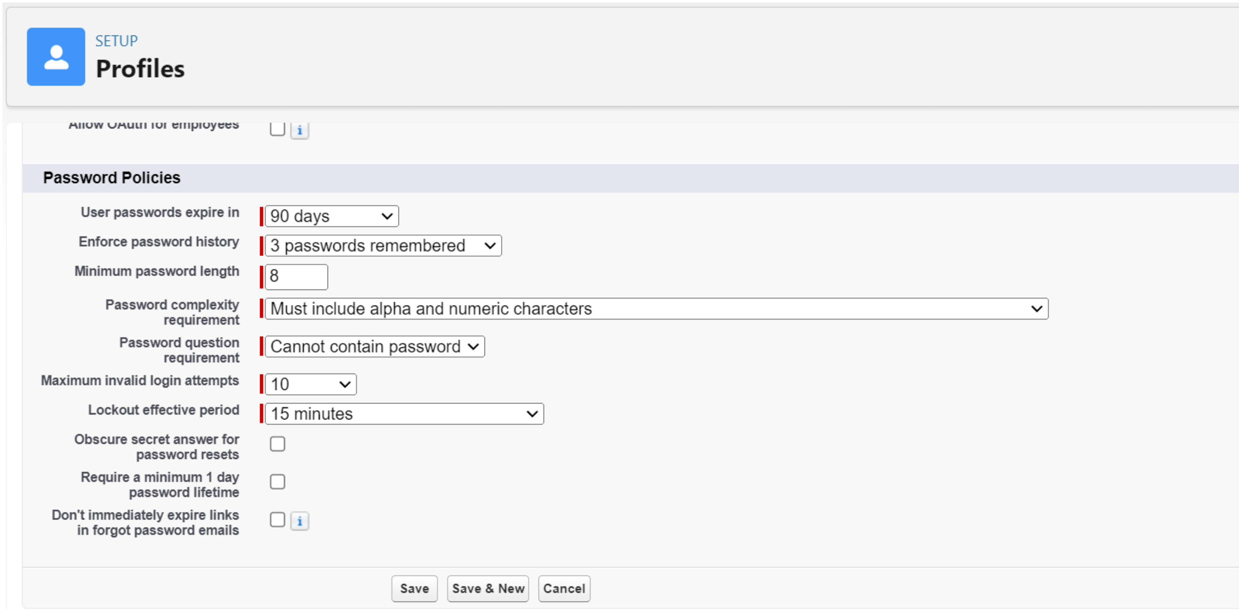
2. While still on the profile page, then click Edit.





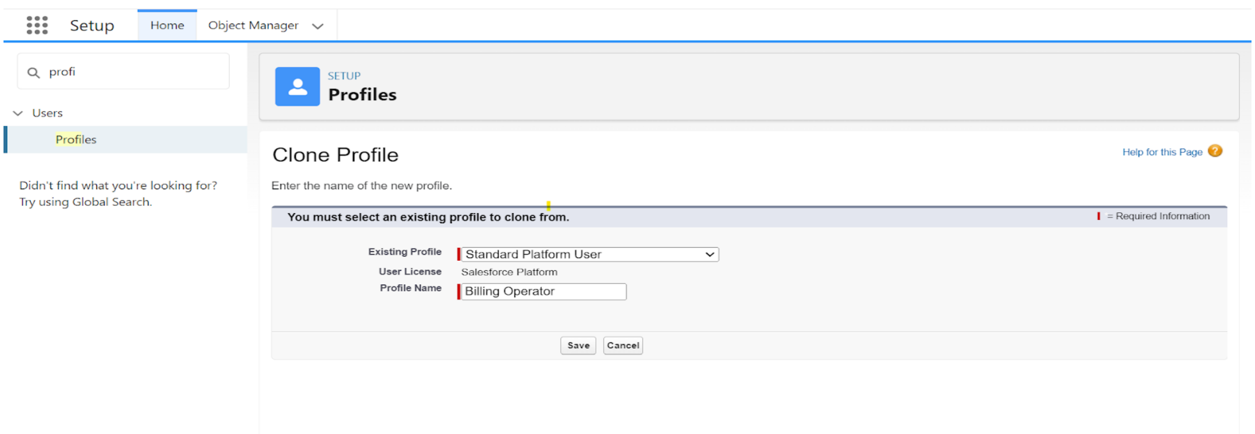
3. Scroll down to the Custom object permission and give all access to the Consultants, Others, Our Customers, Retailers object.

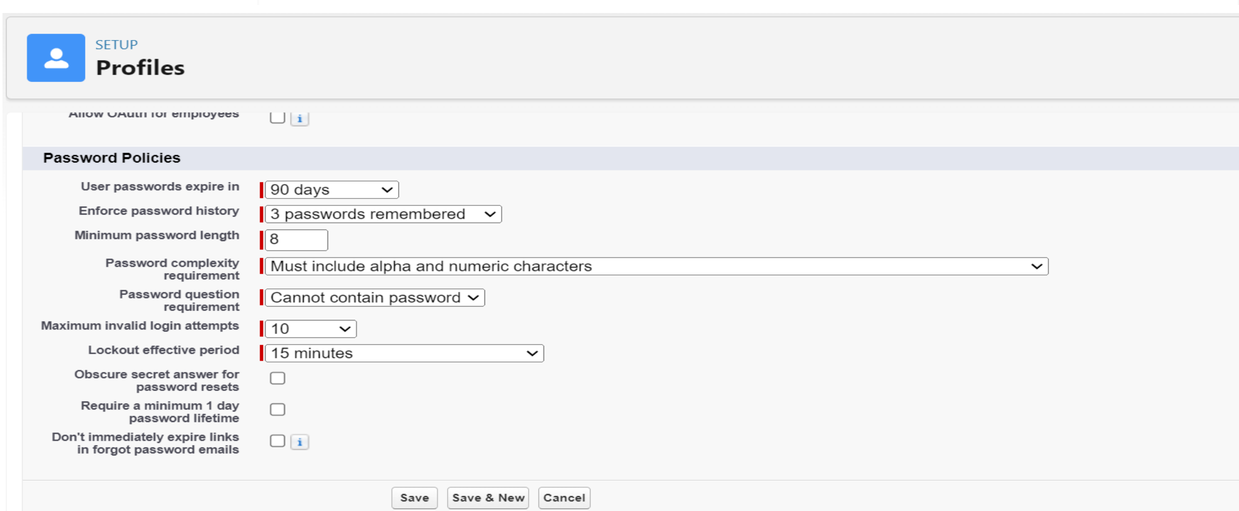




4. Click on Save.

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

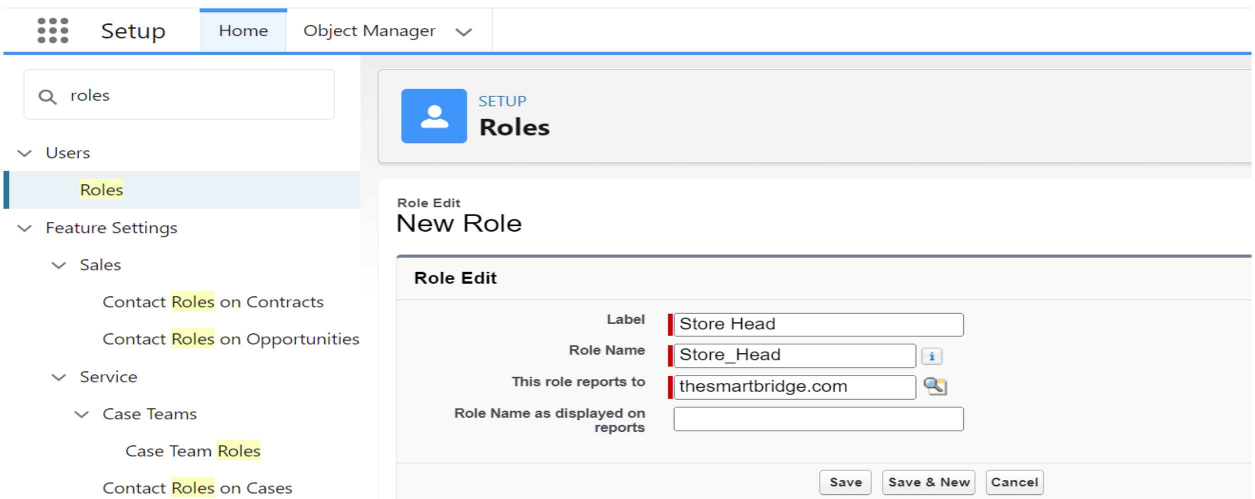


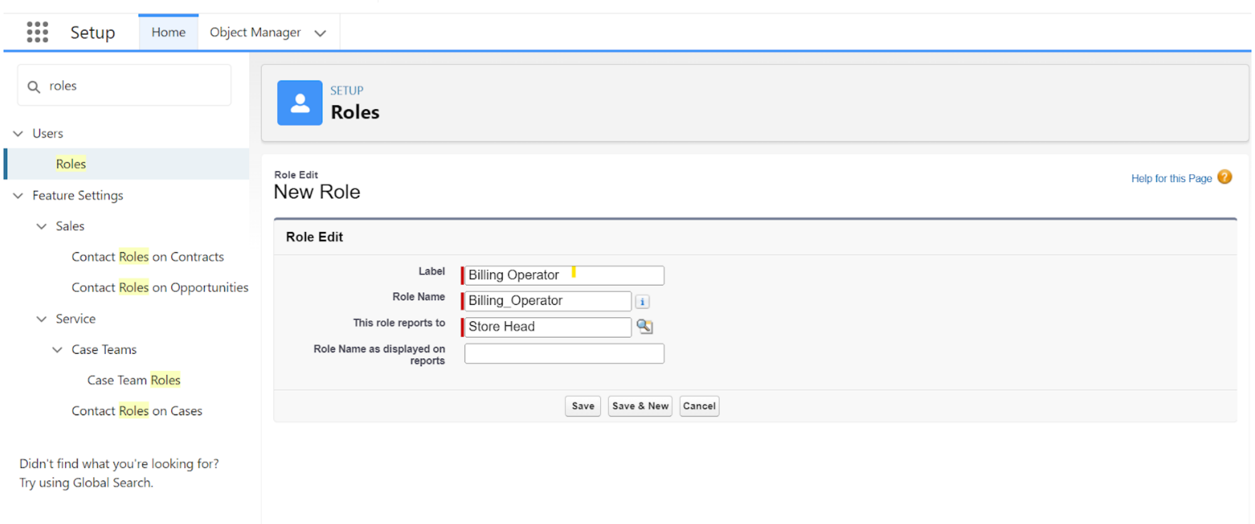


TASK 6. Setting up Roles :

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

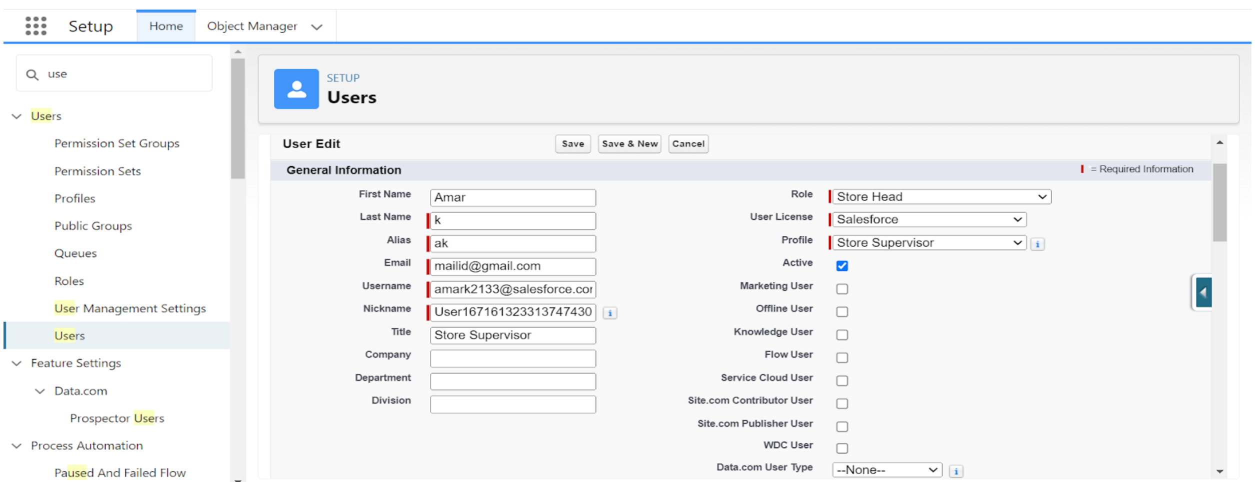
Similarly create One Roles under Store Head as Billing Operator

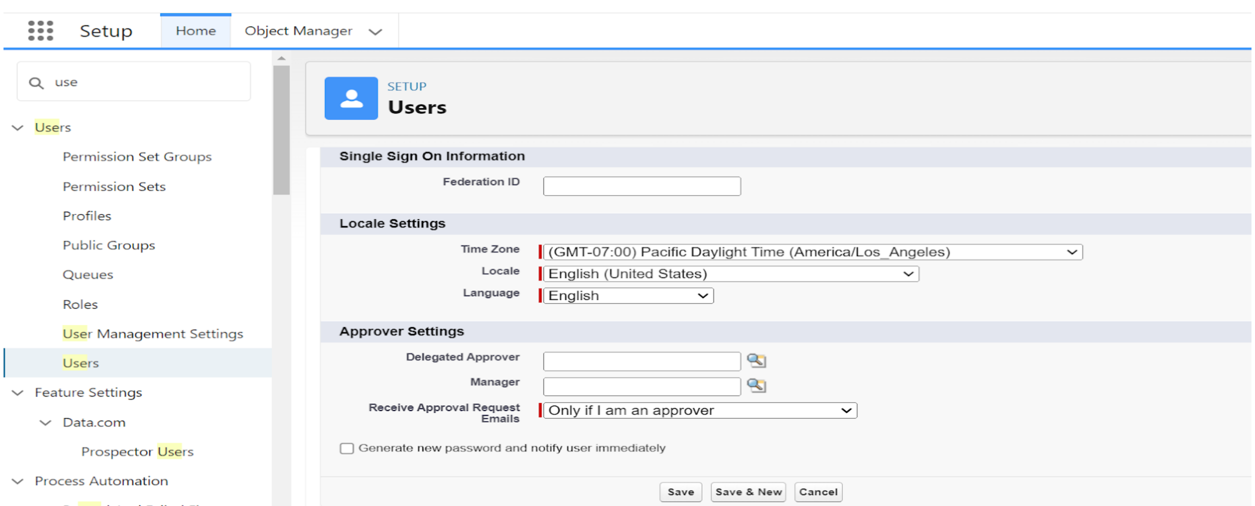




TASK 7. Creation of Users :

- From Setup, in the Quick Find box, enter Users, and then select Users.
- Click New User.
- 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.
- Select a Role(Store Head)
- Select a User Licence As Salesforce.
- Select a profile as Store Supervisor.
- 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.

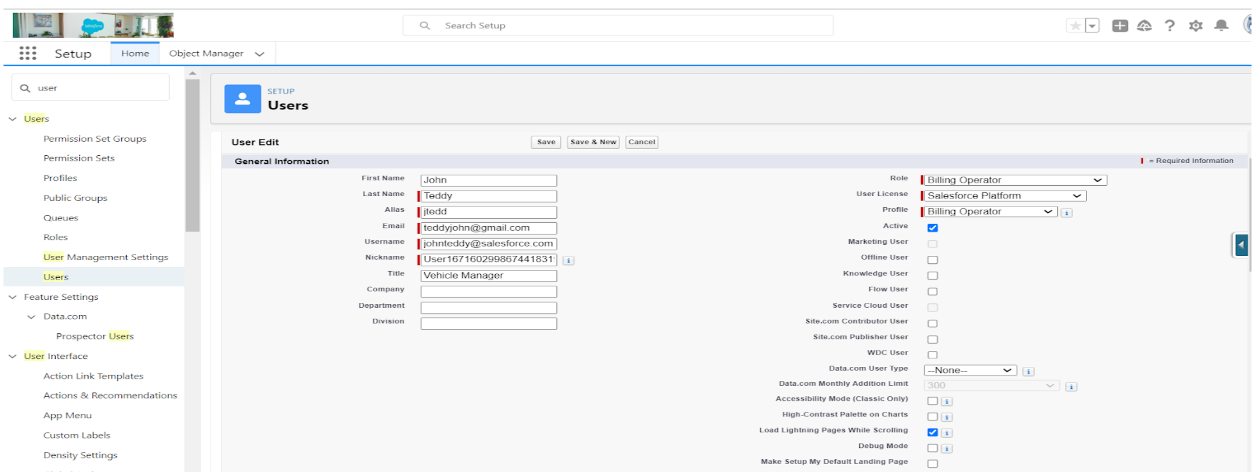


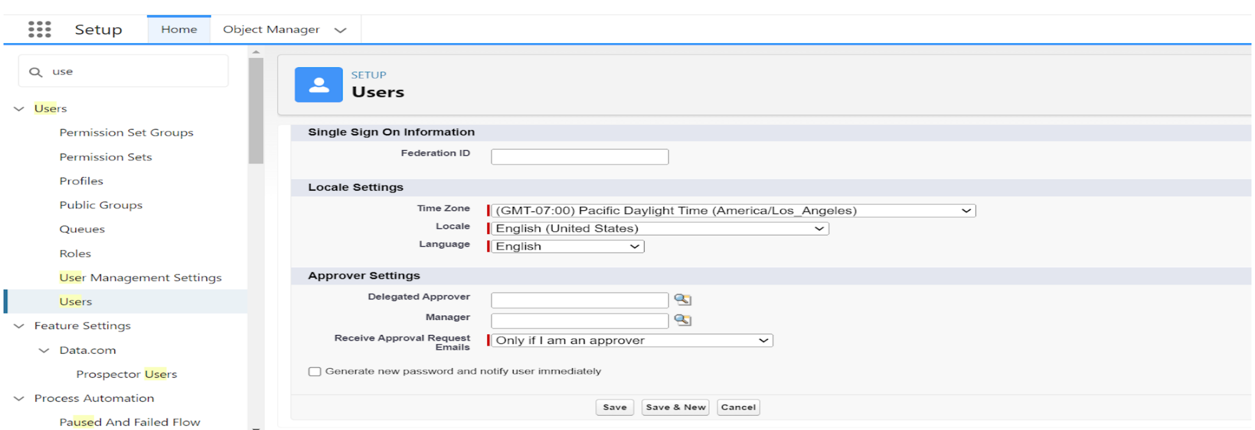


Similarly, create a second user with the below details

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

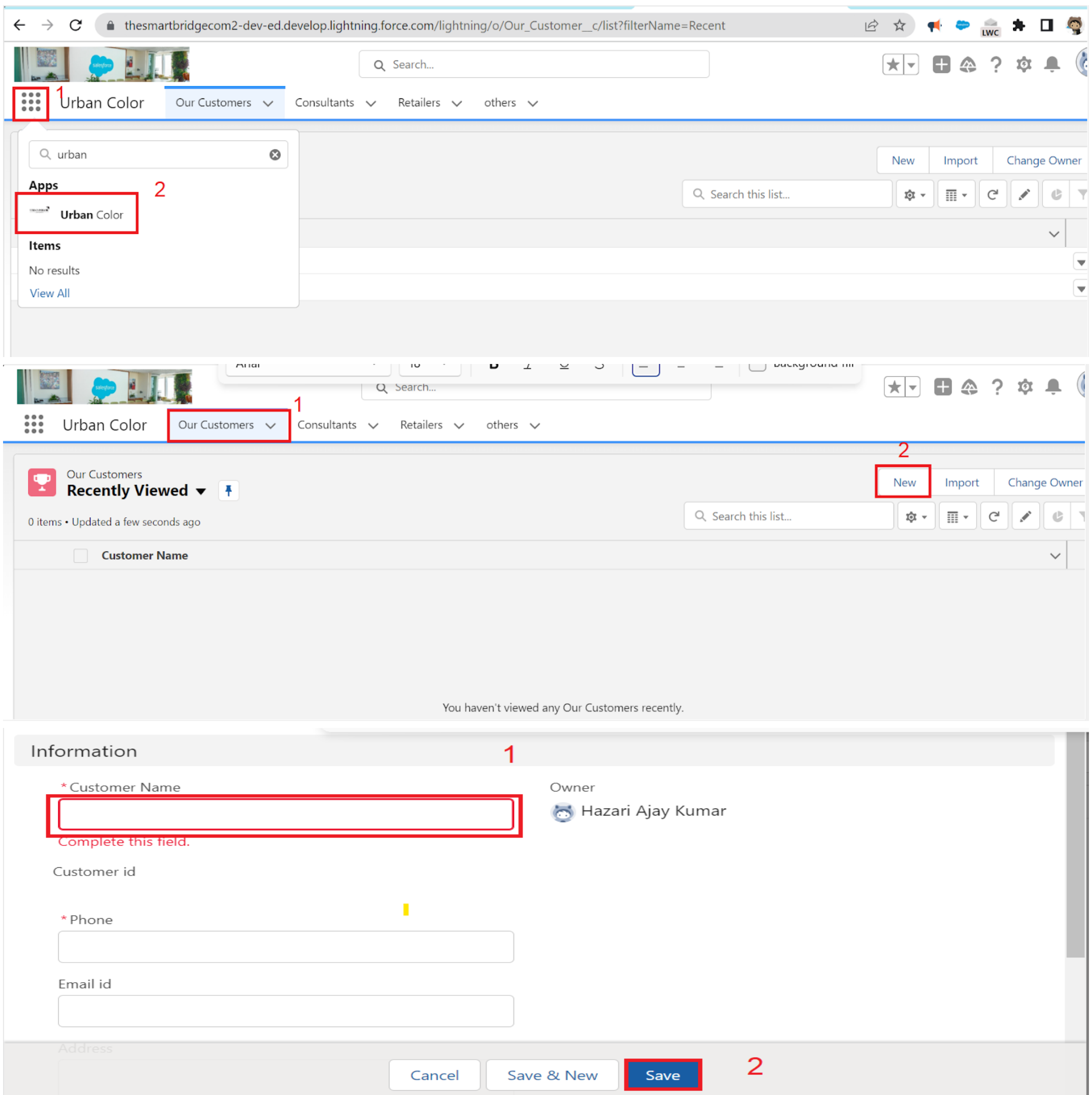
- Fill in the fields (first name, last name, alias, email id, username, nick name, role, user licence, profiles) --> save.





TASK 8. Creating / Modifying Records :

Creating or modifying records in Salesforce involves navigating to the relevant object tab, clicking “New” to create a recordor “Edit” to updatean existing one. For creatingrecords, users fill out the necessaryfields 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.

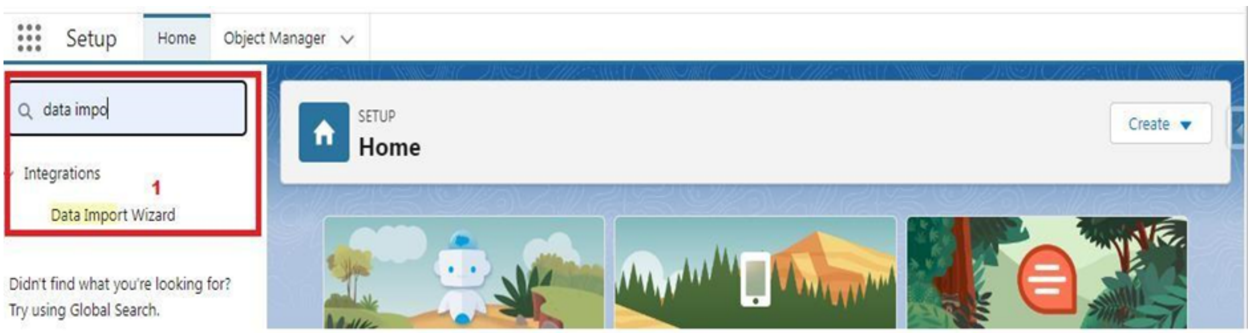


TASK 9. Importing Data :

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.

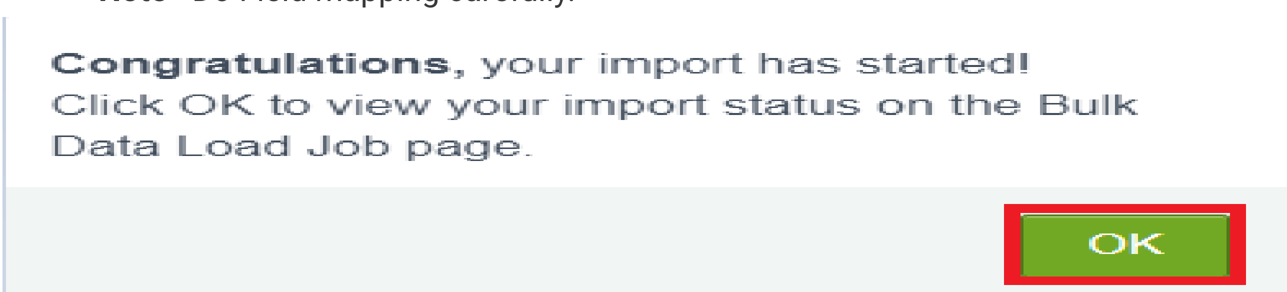
To Import the Data follow the below steps -

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



- Click Launch Wizard!
- Click the Custom Objects tab and select the Consultant object.
- Select Add new records.
- Click CSV and choose file Consultant_CSV which we made earlier. Click 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.
- The next screen gives you a summary of your data import. Click Start Import.
- Click OK on the popup.
- Scroll down the page and verify that your data has been imported under batches.

1. Make sure you have 0 records under the records failed column.
   Note - Do Field mapping carefully.



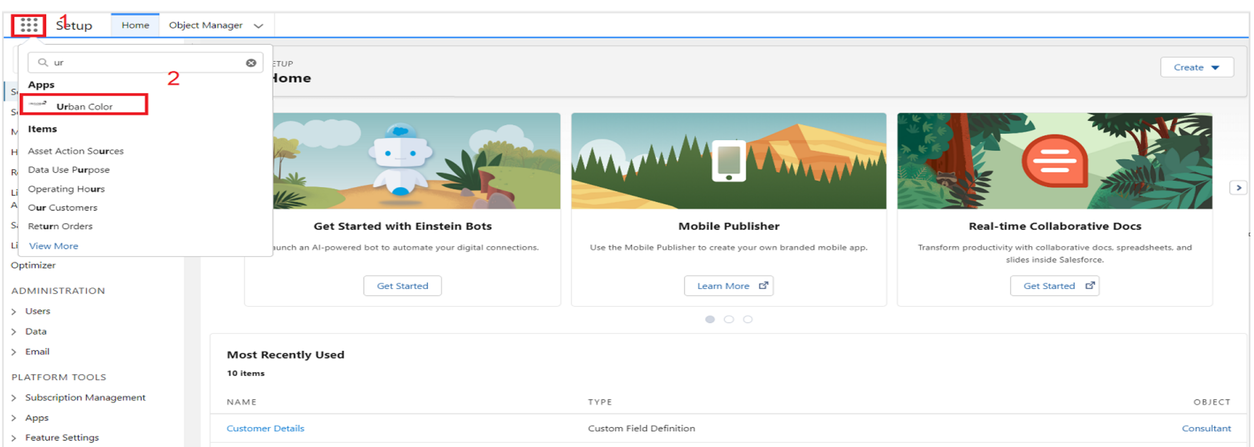
Batches

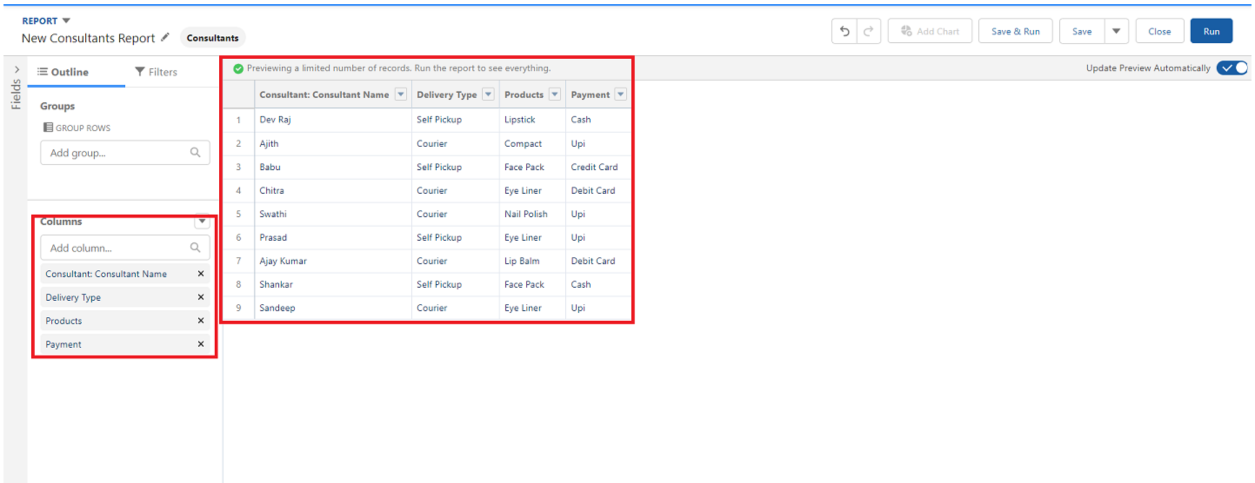
View Request	View Result	Batch ID	Start Time	End Time	Total Processing Time (ms)	API Active Processing Time (ms)	Apex Processing Time (ms)	Records Processed	Records Failed	Retry Count	State Message	Status
View Request	View Result	7512w00000Xqrar	6/19/2023, 11:05 PM	6/19/2023, 11:05 PM	103	52	0	9	0	0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

TASK 10. Accessing Reports :

Creating the 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.

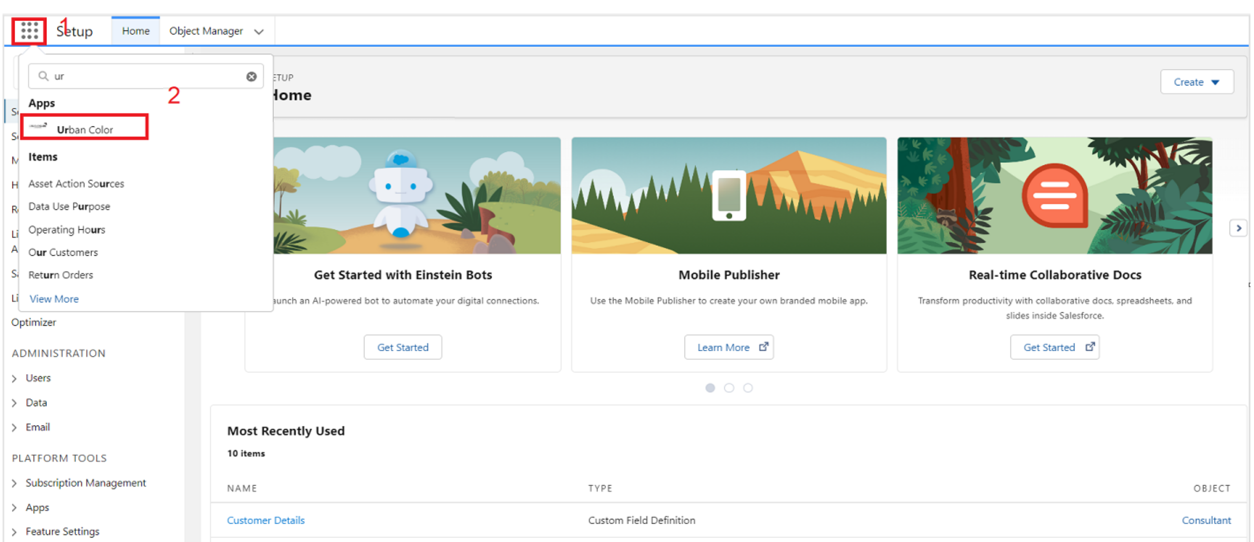




- In Group Rows Add Payment Type Bucket Field.
- Click refresh
- Click Save and Run
- Give report name – Consultant report
- Click Save

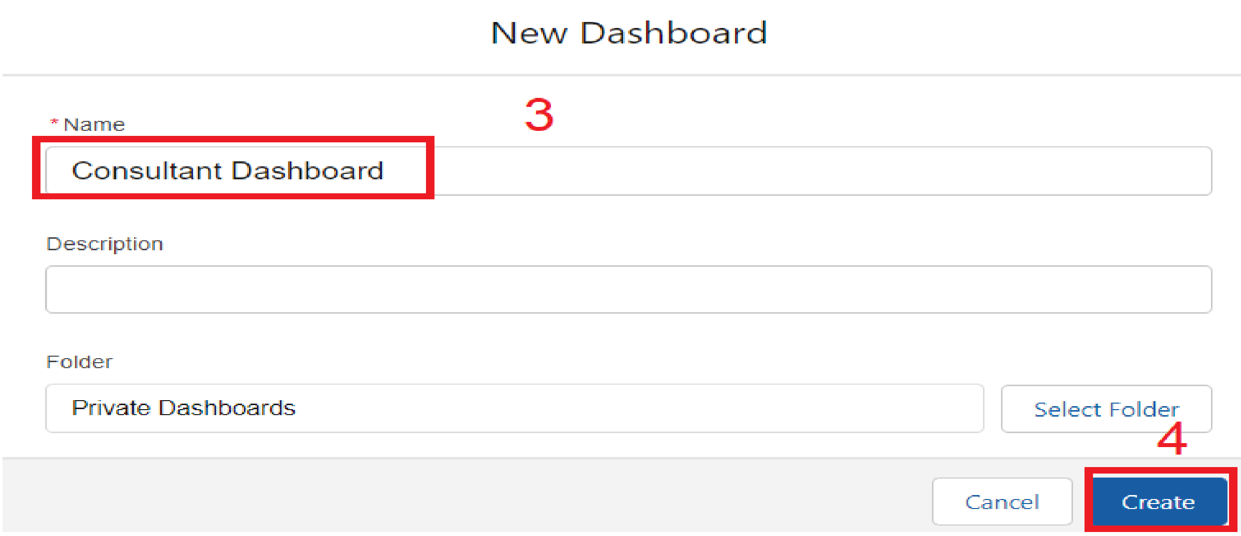
View Report

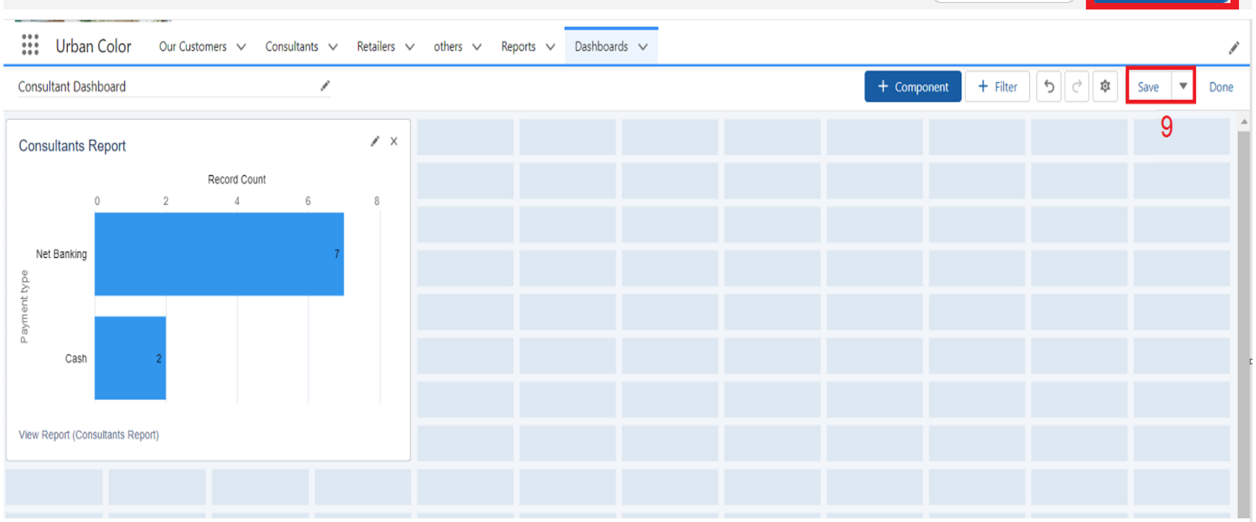
- Click on App Launcher on the left side of the screen.
- Search Urban Color App & click on it.
- Click on Reports Tab.
- Click on Urban Color Report and see records



TASK 11. Creating the Dashboards :

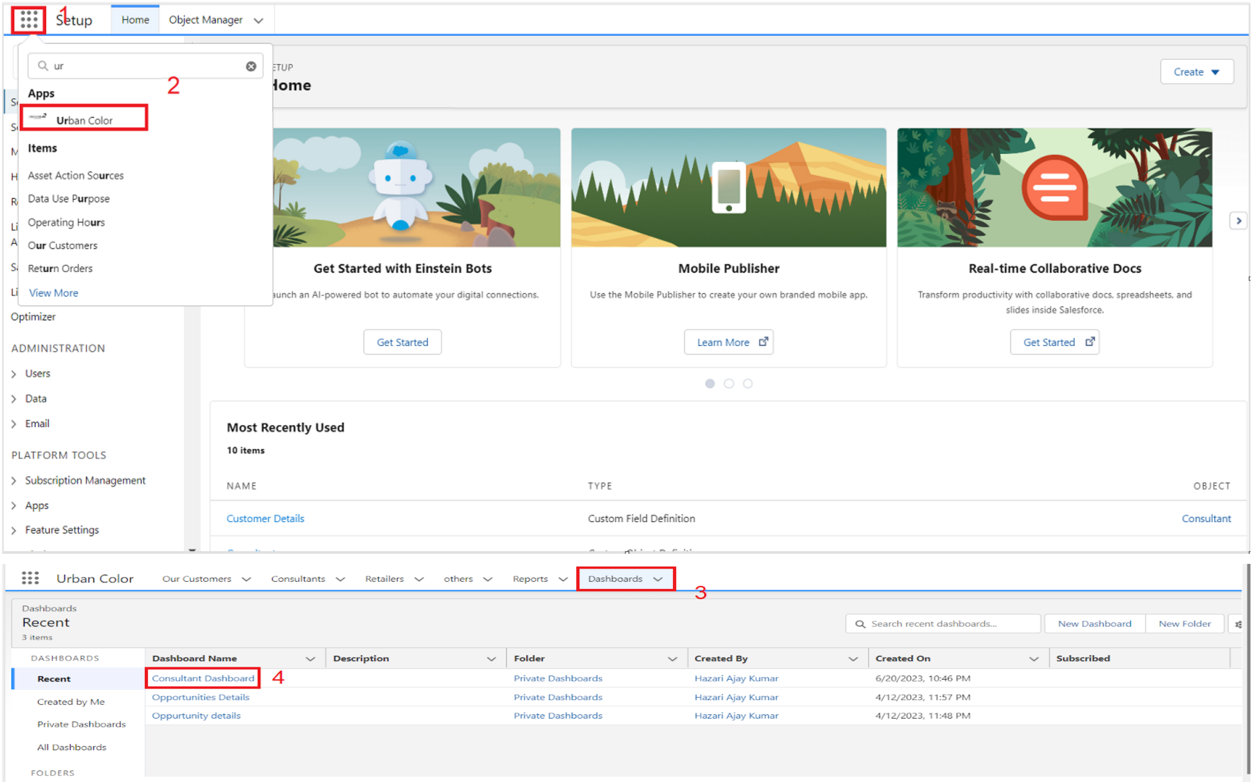
- Click on the Dashboards tab from the Urban Color application.
- Click on the new dashboard.
- Give name- Consultant Dashboard
- Click create
- Give your dashboard a name and click on +component
- Select the Consultants Report which you created.
- For the data visualization select any of the chart,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





To View the Dashboard :

- Click on App Launcher on the left side of the screen.
- Search Candidate Internal Result Card & click on it.
- Click on Dashboard Tab.
- Click on Candidate Internal Result Card see graph view of records



➤ CONCLUSION :

Finally, the Cosmetics Store Management application built on the Salesforce platform offers a transformative solution for beauty retailers seeking to enhance their operational efficiency and customer engagement. By integrating robust features such as customer management, inventory tracking, sales analytics, and marketing automation, this application empowers retailers to make data-driven decisions and tailor their strategies to meet the dynamic needs of their clientele. The involvement of consultants ensures that businesses can maximize the application's capabilities, fostering a collaborative environment that drives success.

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