

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.

The screenshot shows the Salesforce Setup interface. At the top, the 'Setup' link is highlighted with a red box and arrow. Below the navigation bar, the 'Object Manager' link is highlighted with a red box and arrow. In the 'Object Manager' section, the 'Create' button is highlighted with a red box and arrow. A dropdown menu is open, showing 'Custom Object' selected. Under the 'Optional Features' section, the 'Allow Reports' and 'Allow Search' checkboxes are checked and highlighted with red arrows. At the bottom, the 'Save' button is highlighted with a red box and arrow.

The screenshot shows the Salesforce 'New Custom Object' setup page. The form is titled 'Custom Object Definition Edit'. It includes sections for 'Custom Object Information', 'Enter Record Name Label and Format', and 'Optional Features'. Red boxes and arrows highlight the following fields:

- Label:** Example: Account
- Plural Label:** Example: Accounts
- Object Name:** Example: Account
- Data Type:** Text
- Optional Features:** Show Reports, Allow Activities, Track Field History

We need to create 4 objects named Our 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 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:

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)

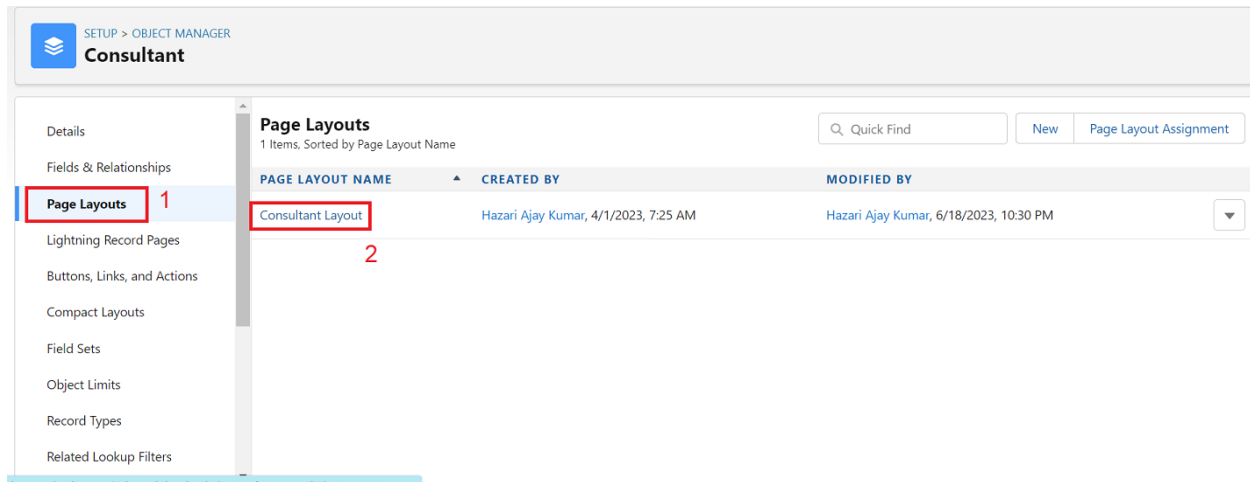
Fields in Others objects:

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

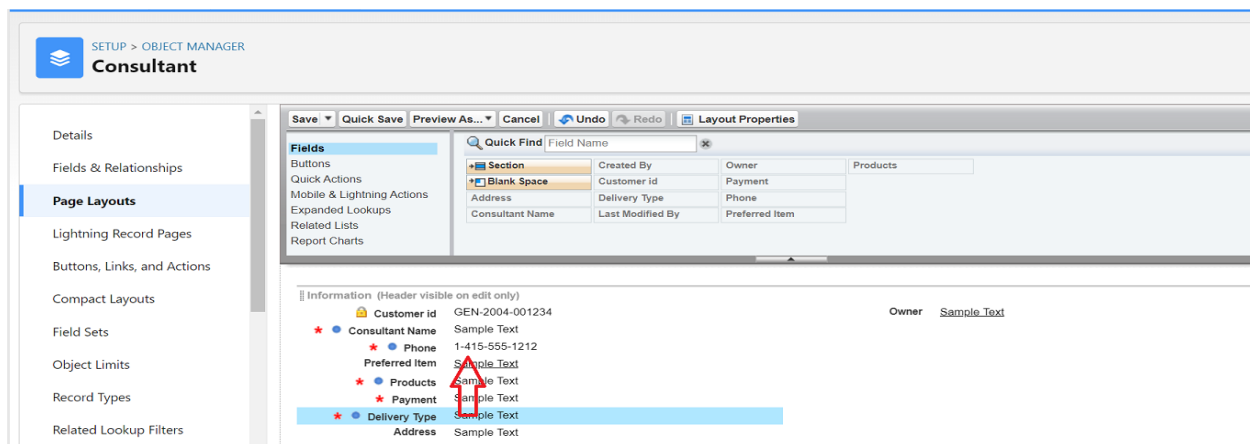
In the Cosmetic Store Management System built on Salesforce, fields and relationships are designed to streamline operations and enhance data management. Key fields include customer details (e.g., contact information and purchase history), product specifics (e.g., SKU, price, and inventory levels), order 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



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



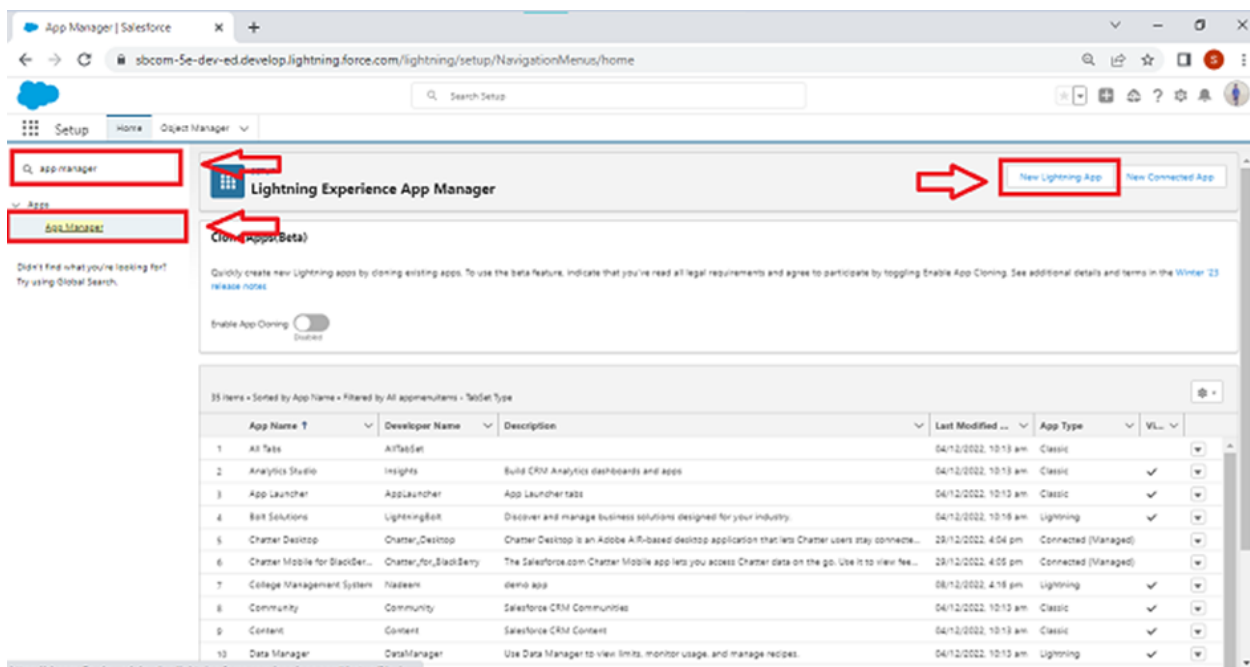
Creating a page layout in Salesforce involves navigating to the object manager, selecting the relevant object, and either creating a new layout or editing an existing one. You can design layout by dragging and dropping fields, adding sections and related lists, and including buttons or links as needed. 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 Name ⓘ
Name your app...

*Developer Name ⓘ
Enter a developer name...

Description ⓘ
Enter a description...

App Branding

Image ⓘ
Upload

Primary Color Hex Value ⓘ
#007002

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

Type to filter list...

- Accounts
- Activities
- Alert Settings
- All Sites
- Alternative Payment Methods
- App Launcher
- Appointment Invitations

Selected Items

No items selected

Back

Next

New Lightning App

User Profiles

Choose the user profiles that can access this app.

Available 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

Selected Profiles

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:

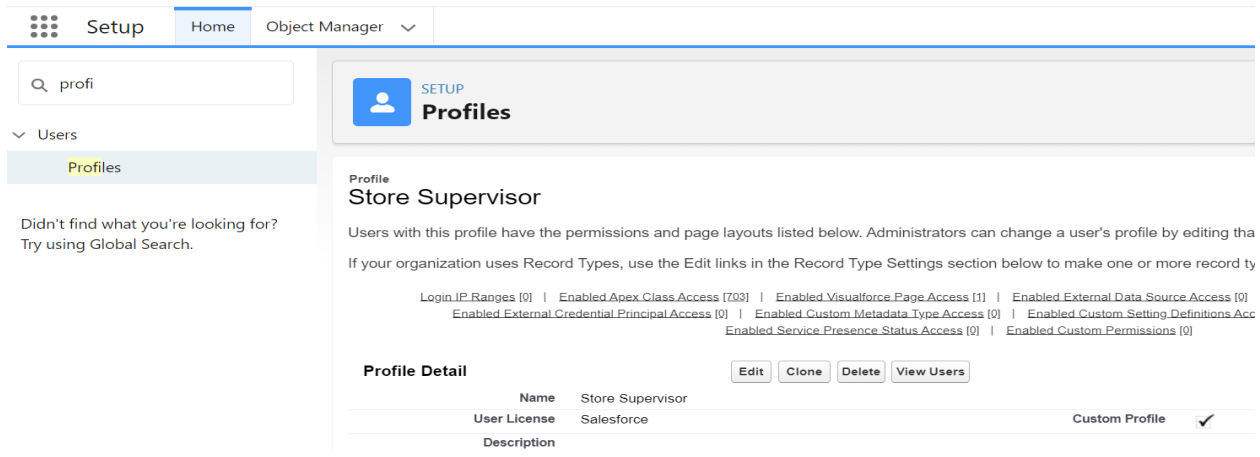
1. Go to setup --> type profiles in quick find box --> click on profiles --> clone the desired profile (standard user is preferable) --> enter profile name --> save.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar on the left contains 'prof'. The left sidebar shows a tree view with 'Users' and 'Profiles' (highlighted). The main content area is titled 'Clone Profile' and contains the following text: 'Enter the name of the new profile.' Below this is a message: 'You must select an existing profile to clone from.' A table lists existing profiles: 'Standard User' with 'Salesforce' as the user license. The 'Profile Name' field is populated with 'Store Supervisor'. At the bottom are 'Save' and 'Cancel' buttons.

Existing Profile	User License
Standard User	Salesforce

Profile Name:

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



Setup Home Object Manager

Q profi

Users

Profiles

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

Profile: **Store Supervisor**

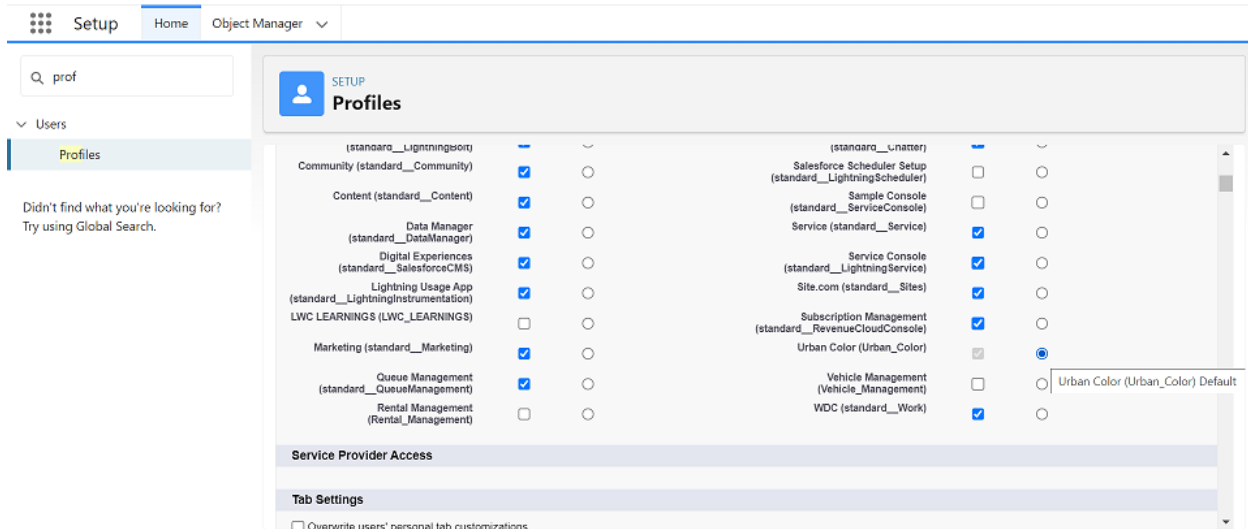
Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing the user's profile.

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

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

Profile Detail Edit Clone Delete View Users

Name	Store Supervisor
User License	Salesforce
Description	Custom Profile <input checked="" type="checkbox"/>



Setup Home Object Manager

Q prof

Users

Profiles

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

Profile: **Store Supervisor**

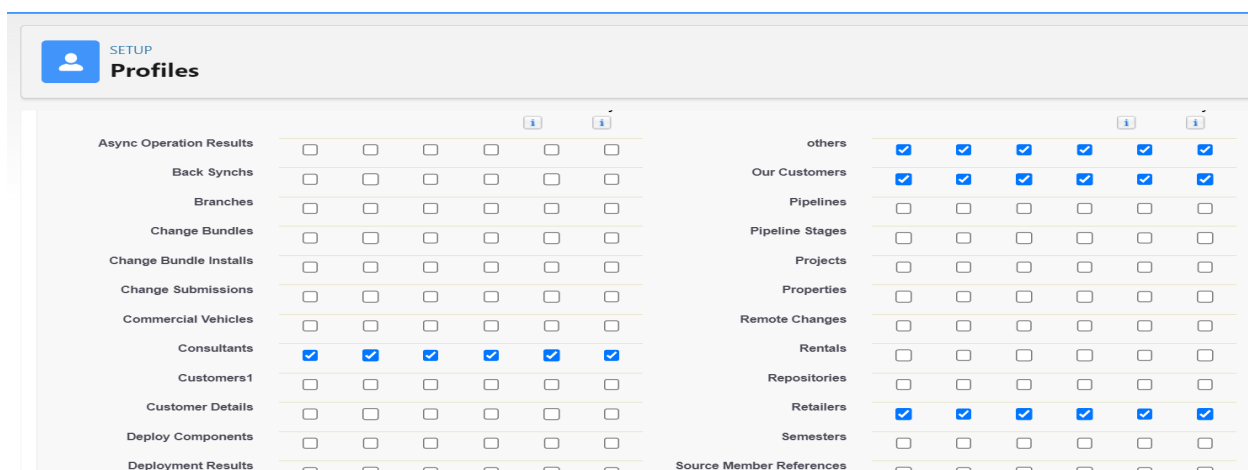
(standard__LightningSort)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	(standard__Unatter)	<input type="checkbox"/>	<input type="checkbox"/>
Community (standard__Community)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Salesforce Scheduler Setup (standard__LightningScheduler)	<input type="checkbox"/>	<input type="checkbox"/>
Content (standard__Content)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Sample Console (standard__ServiceConsole)	<input type="checkbox"/>	<input type="checkbox"/>
Data Manager (standard__DataManager)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Service (standard__Service)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Digital Experiences (standard__SalesforceCIMS)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Service Console (standard__LightningService)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Lightning Usage App (standard__LightningInstrumentation)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Site.com (standard__Sites)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
LWC LEARNINGS (LWC_LEARNINGS)	<input type="checkbox"/>	<input type="checkbox"/>	Subscription Management (standard__RevenueCloudConsole)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Marketing (standard__Marketing)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Urban Color (Urban_Color)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Queue Management (standard__QueueManagement)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Vehicle Management (Vehicle_Management)	<input type="checkbox"/>	<input type="checkbox"/>
Rental Management (Rental_Management)	<input type="checkbox"/>	<input type="checkbox"/>	WDC (standard__Work)	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Service Provider Access

Tab Settings

☐ Overwrite users' personal tab customizations

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



Setup Home Object Manager

Q prof

Users


Profiles


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

Profile: **Store Supervisor**

Async Operation Results	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Back Synchs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Branches	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Change Bundles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Change Bundle Installs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Change Submissions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Commercial Vehicles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Consultants	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Customers1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer Details	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Deploy Components	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Deployment Results	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

others	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Our Customers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Pipelines	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pipeline Stages	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Properties	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Remote Changes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rentals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Repositories	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Retailers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Semesters	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Source Member References	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>


SETUP
Profiles

ALLOW GRANT FOR EMPLOYEES
☐


Password Policies

User passwords expire in **90 days**

Enforce password history **3 passwords remembered**

Minimum password length **8**

Password complexity requirement **Must include alpha and numeric characters**


Password question requirement **Cannot contain password**

Maximum invalid login attempts **10**

Lockout effective period **15 minutes**

Obscure secret answer for password resets ☐


Require a minimum 1 day password lifetime ☐

Don't immediately expire links in forgot password emails ☐


Save Save & New Cancel

4. Click on Save.

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



Setup

Home Object Manager

Users

Profiles

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


SETUP
Profiles

Clone Profile

Help for this Page

Enter the name of the new profile.


You must select an existing profile to clone from.


Existing Profile **Standard Platform User**

User License **Salesforce Platform**

Profile Name **Billing Operator**

Save Cancel


SETUP
Profiles

ALLOW GRANT FOR EMPLOYEES
☐


Password Policies

User passwords expire in **90 days**

Enforce password history **3 passwords remembered**

Minimum password length **8**

Password complexity requirement **Must include alpha and numeric characters**


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Maximum invalid login attempts **10**

Lockout effective period **15 minutes**

Obscure secret answer for password resets ☐

Require a minimum 1 day password lifetime ☐

Don't immediately expire links in forgot password emails ☐


Save Save & New Cancel

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

Setup Home Object Manager

roles

Users

Roles

Feature Settings

Sales

Contact Roles on Contracts

Contact Roles on Opportunities

Service

Case Teams

Case Team Roles

Contact Roles on Cases

Role Edit

SETUP Roles

New Role

Role Edit

Label Store Head

Role Name Store_Head

This role reports to thesmartbridge.com

Role Name as displayed on reports

Save Save & New Cancel

Setup Home Object Manager

roles

Users

Roles

Feature Settings

Sales

Contact Roles on Contracts

Contact Roles on Opportunities

Service

Case Teams

Case Team Roles

Contact Roles on Cases

Role Edit

SETUP Roles

New Role

Role Edit

Label Billing Operator

Role Name Billing_Operator

This role reports to Store Head

Role Name as displayed on reports

Save Save & New Cancel

Help for this Page

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

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.

The screenshot shows the 'User Edit' page in Salesforce Setup. The left sidebar contains a navigation menu with 'Users' selected. The main content area is titled 'User Edit' and has tabs for 'General Information', 'Single Sign On Information', 'Locale Settings', and 'Approver Settings'. The 'General Information' tab is active, displaying various user details and settings. The 'Generate new password and notify user immediately' checkbox is checked.

The screenshot shows the 'Single Sign On Information' tab in the 'User Edit' page. It includes fields for 'Federation ID', 'Time Zone', 'Locale', and 'Language'. The 'Approver Settings' section includes fields for 'Delegated Approver', 'Manager', and 'Receive Approval Request Emails'. The 'Generate new password and notify user immediately' checkbox is also visible.

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.

The image consists of three screenshots illustrating the steps to create a new record in Salesforce.

Top Screenshot: Shows the Salesforce navigation bar with the 'Urban Color' app selected (labeled 1). A dropdown menu is open, showing 'Apps' and 'Items' (labeled 2). The 'Urban Color' app is highlighted under 'Apps'.

Middle Screenshot: Shows the 'Our Customers' object page. The 'New' button is highlighted (labeled 2). The page displays 'Recently Viewed' records, which are currently empty.

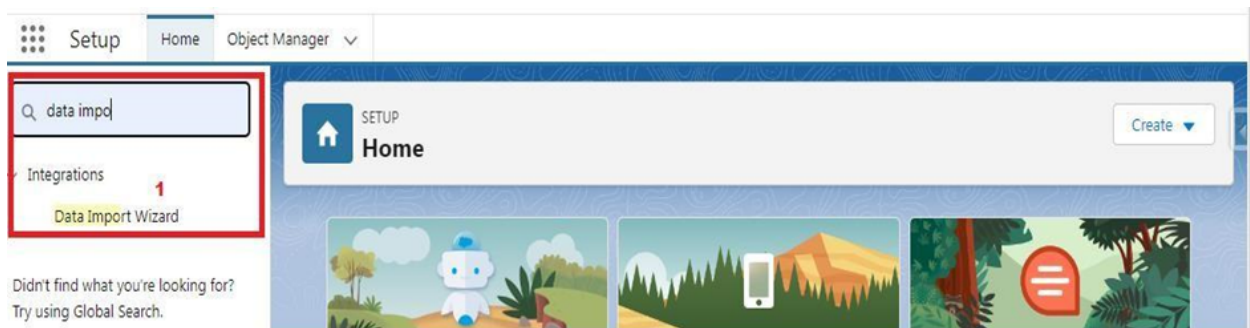
Bottom Screenshot: Shows the 'Information' section of the 'New' record form (labeled 1). The 'Customer Name' field is highlighted (labeled 2) with a red box and the text 'Complete this field.' Below it are fields for 'Customer id', 'Phone', and 'Email id'. The 'Owner' field shows 'Hazari Ajay Kumar'. At the bottom, the 'Save' button is highlighted (labeled 2).

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.

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

OK

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	7512w00000Xqqr	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.

The screenshot shows the Salesforce App Launcher interface. On the left, the 'Apps' menu is open, and 'Urban Color' is selected. The main area displays three app cards: 'Get Started with Einstein Bots', 'Mobile Publisher', and 'Real-time Collaborative Docs'. Below these is a 'Most Recently Used' section with a table of items.

Below the app launcher, the 'Save Report' dialog is shown. It contains the following fields:

- Report Name:** Consultants Report (highlighted with a red box and number 1)
- Report Unique Name:** Consultants_Report_hvb
- Report Description:** (empty text area)
- Folder:** Private Reports (highlighted with a red box and number 2)
- Buttons:** Cancel and Save (the Save button is highlighted with a red box and number 3)

REPORT ▾
New Consultants Report / Consultants

Outline Filters

Groups

GROUP ROWS

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.

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

Update Preview Automatically ☒

- 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

Setup Home Object Manager ▾

Apps

Urban Color

Items

Asset Action Sources

Data Use Purpose

Operating Hours

Our Customers

Return Orders

View More

Optimizer

ADMINISTRATION

Users

Data

Email

PLATFORM TOOLS

Subscription Management

Apps

Feature Settings

Get Started

Mobile Publisher

Learn More

Real-time Collaborative Docs

Get Started

Most Recently Used

10 items

NAME	TYPE	OBJECT
Customer Details	Custom Field Definition	Consultant

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.

New Dashboard

* Name 3

Consultant Dashboard

Description

Folder

Private Dashboards

Select Folder

4

Cancel

Create

Urban Color

Our Customers ▾

Consultants ▾

Retailers ▾

others ▾

Reports ▾

Dashboards ▾

✎

Consultant Dashboard

✎

+ Component

+ Filter

↶

↷

⚙

Save ▾

Done

Consultants Report

✎ x

Record Count

Payment type	Record Count
Net Banking	7
Cash	2

View Report (Consultants Report)

9

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

The screenshot shows the Salesforce App Launcher interface. The 'Urban Color' app is selected. The main dashboard area displays 'Most Recently Used' items, including 'Customer Details' and 'Custom Field Definition'. The 'Dashboards' tab is selected in the top navigation bar, showing a list of recent dashboards.

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

► 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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