



LENDI INSTITUTE OF ENGINEERING AND TECHNOLOGY

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Cosmetics Store Management

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**[https://www.salesforce.com/trailblazer/wd5iaa0c
skzfhww7gb](https://www.salesforce.com/trailblazer/wd5iaa0c-skzfhww7gb)**

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Introduction

Cosmetics Store Management in Salesforce is a comprehensive solution designed to help cosmetics stores efficiently manage their operations. Built on the Salesforce platform, this solution enables stores to streamline customer relationship management (CRM), sales processes, and inventory tracking. By leveraging Salesforce's capabilities, cosmetics stores can improve operational efficiency, enhance customer engagement, and drive growth.

1. Salesforce Org Creation

Description: Created a new Salesforce org to manage store operations.

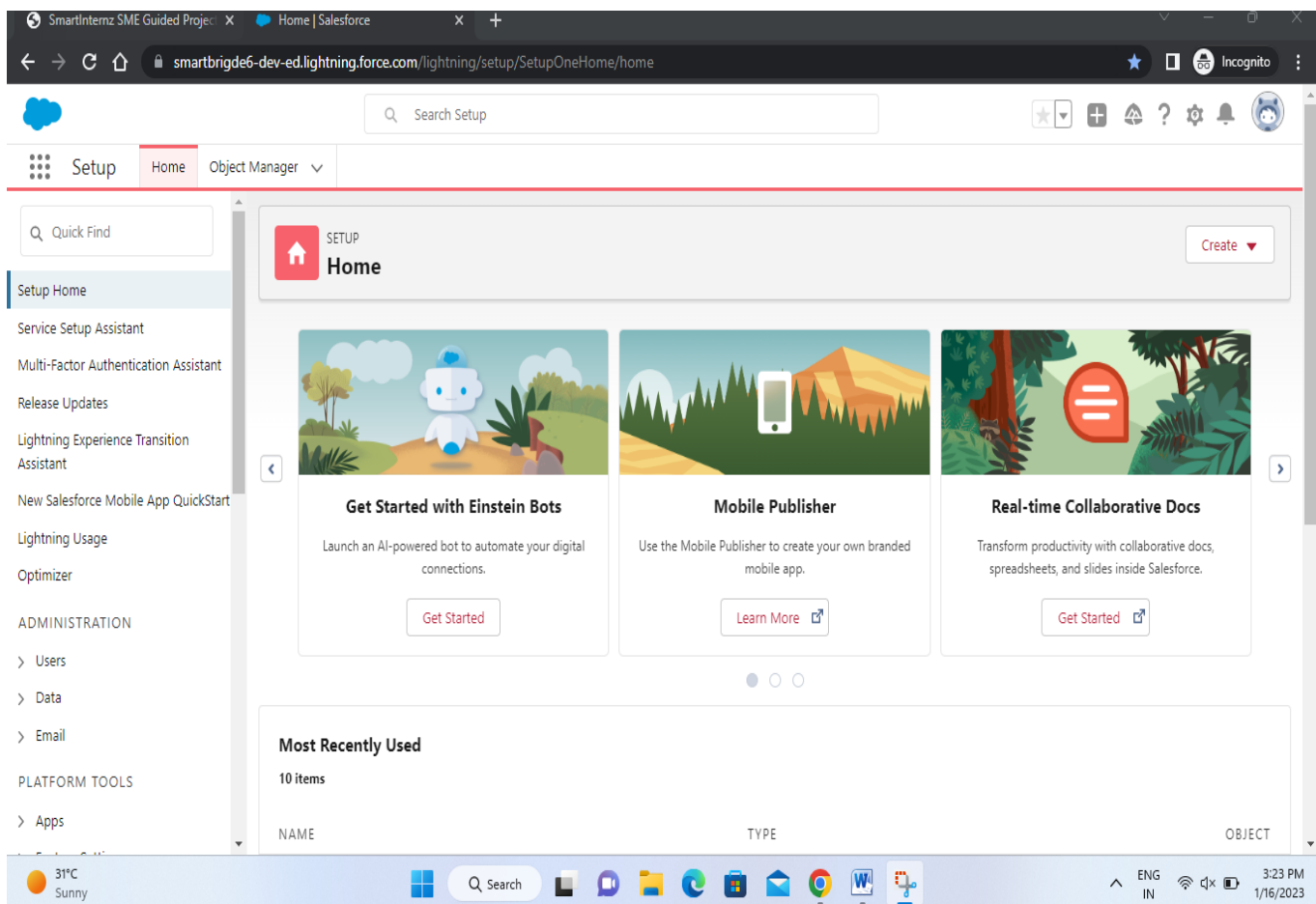
Steps:

Signed up for a new Salesforce Developer Org.

Configured default settings.

Applied necessary security configurations.

Outcome: A functional org ready for object and data setup.



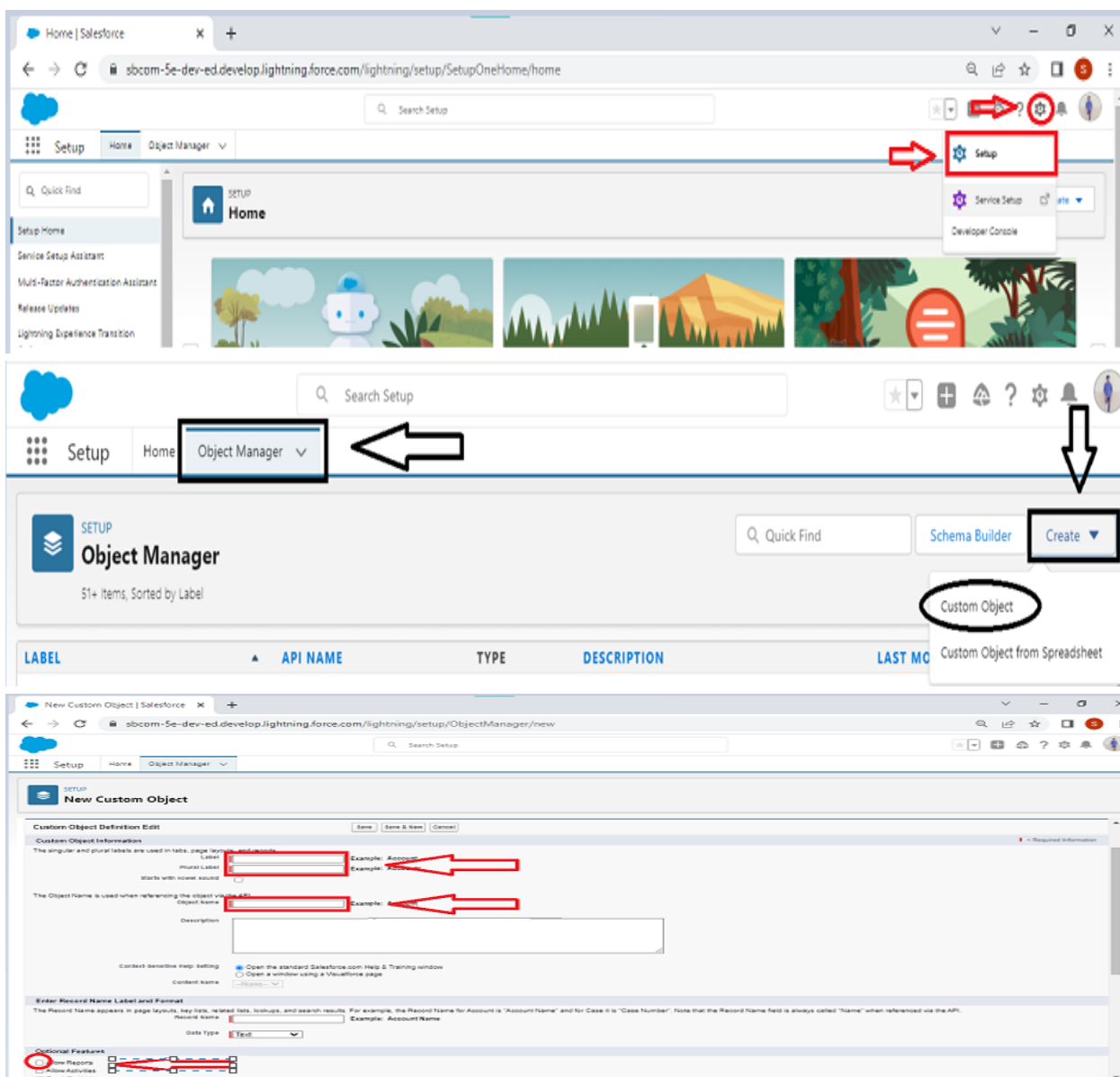
2. Objects

To Create an object:

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

The below steps will assist you in creating those objects.

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



Optional Features

- ☒ Allow Reports
- ☐ Allow Activities
- ☐ Track Field History
- ☐ Allow in Chatter Groups
- ☐ Enable Licensing

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more.](#)

- ☒ Allow Sharing
- ☒ Allow Bulk API Access
- ☒ Allow Streaming API Access

Deployment Status

[What is this?](#)

- ☐ In Development
- ☒ Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more.](#)

- ☒ Allow Search

Object Creation Options (Available only when custom object is first created)

- ☐ Add Notes and Attachments related list to default page layout
- ☐ Launch New Custom Tab Wizard after saving this custom object

Buttons: Save, Save & More, Cancel

Note: Do the same steps for Creation of Consultant Object, Creation of Retailer Object and Creation of others Object

3. Fields and Relationships

Custom Fields:

Product Object: Product Name, Price, SKU, Stock Quantity.

Customer Object: Name, Email, Phone, Loyalty Points.

Order Object: Order Date, Quantity, Total Price.

Relationships:

Lookup relationship between Customer and Orders.

Master-detail relationship between Orders and Products.

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

4. Page Layouts

Page Layout Customization:

Customized layouts for Products, Customers, and Orders.

Displayed key fields and related lists prominently on each layout.

Record Types:

Created different layouts for product categories.

5. The Lightning App

App Creation:

Created a custom Lightning App named Cosmetics Store Manager.

Added key objects (Products, Customers, Orders) for easy access.

Features:

Custom tabs, logos, and simplified navigation for store management.

Navigation: Configured user-friendly navigation components.

To Add Navigation Items:

6. Profiles

Profiles Created:

Sales Associate: Can view and manage orders and customer details.

Manager: Full access to all objects, reports, and dashboards.

Permissions:

Different permissions were assigned based on roles to ensure data security.

The screenshot shows the 'SETUP Profiles' page in Salesforce. The 'Password Policies' section is expanded, showing various settings for user passwords. The settings include: 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 (unchecked), Require a minimum 1 day password lifetime (unchecked), and Don't immediately expire links in forgot password emails (unchecked). At the bottom, there are buttons for 'Save', 'Save & New', and 'Cancel'.

7. Roles Setup

Roles Defined:

Store Manager: Full access to all data.

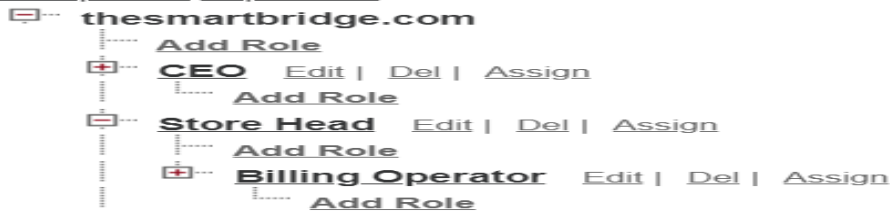
Sales Representative: Limited access to customer and order information.

Hierarchy:

Established a role hierarchy to control data visibility.

Your Organization's Role Hierarchy

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



8. Users

User Creation:

Created users with appropriate profiles (Sales Rep, Manager).

Assigned roles and permissions based on responsibilities.

The screenshot shows the 'SETUP Users' page in Salesforce. The 'User Edit' form is displayed, showing the details for a user named Amar. The form includes fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. The Role is set to Store Head, User License is Salesforce, and Profile is Store Supervisor. The Active checkbox is checked. There are also checkboxes for Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, and WDC User. The Data.com User Type is set to --None--.

9. User Adoption

Strategies:

Provided in-app guidance and tutorials for users.

Created custom training materials and walkthroughs.

Tools Used:

Salesforce In-App Guidance for tooltips and tips.

Conducted user feedback sessions for improvements.

Create Our Customer Record:

Fill all Our Customer record details.

View Record (Our Customer):

Click on any record name. you can see the details of the Our Customer

Delete Record (Our Customer):

Click on Arrow at right hand side on that Particular record

10. Data Import

Data Imported:

Customer data (e.g., contact info, order history) and product data (e.g., inventory, pricing).

Tools Used:

Data Loader: For bulk import of customer and product data.

Import Wizard: Used for smaller data imports.

The screenshot displays the 'Review & Start Import' step of the Data Import Wizard. At the top, a progress bar shows four steps: '2-step: Prepare your data for import', 'Choose data to import', 'Edit field mapping', and 'Review and start import'. A red box highlights a 'Launch Wizard!' button in the 'Choose data to import' step, with a red '2' next to it. Below this, the 'Review & Start Import' section is shown, containing a summary of the import: 'Your selections' (Consultants, Add new records, Consultants - Sheet1 (2).csv), 'Your import will include: Mapped fields 7', and 'Your import will not include: Unmapped fields 0'. At the bottom right, there are 'Cancel', 'Previous', and 'Start Import' buttons, with 'Start Import' highlighted by a red box. Below the wizard, a message states: 'Congratulations, your import has started! Click OK to view your import status on the Bulk Data Load Job page.' An 'OK' button is highlighted with a red box.

11. Reports

Reports Created:

Sales Report: Tracks total sales by period, product, and customer.

Customer Purchases Report: Displays purchase history for each customer.

Inventory Report: Monitors current stock levels of each product.

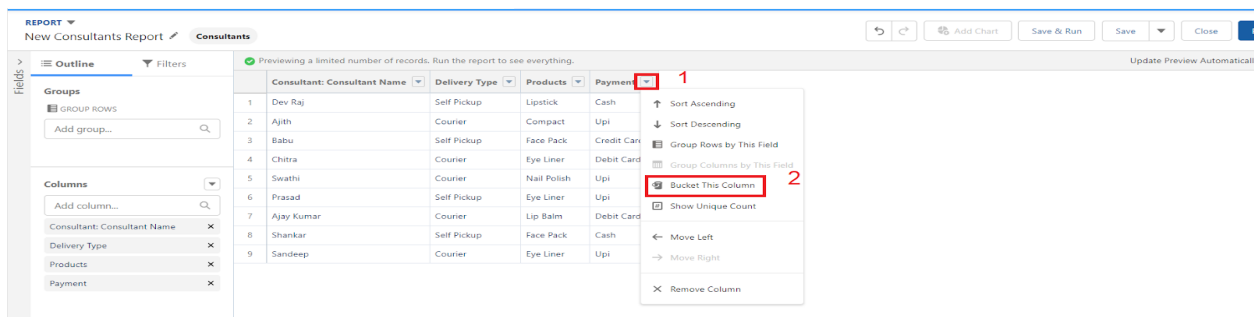
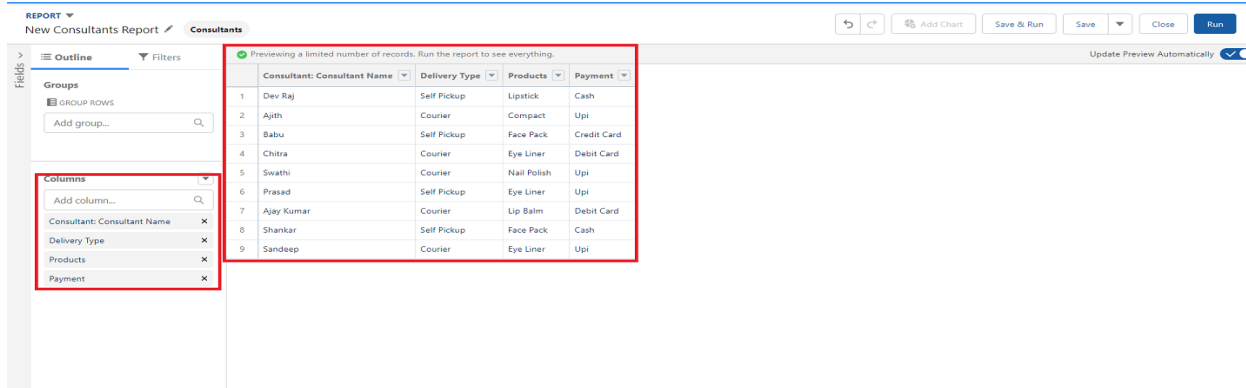
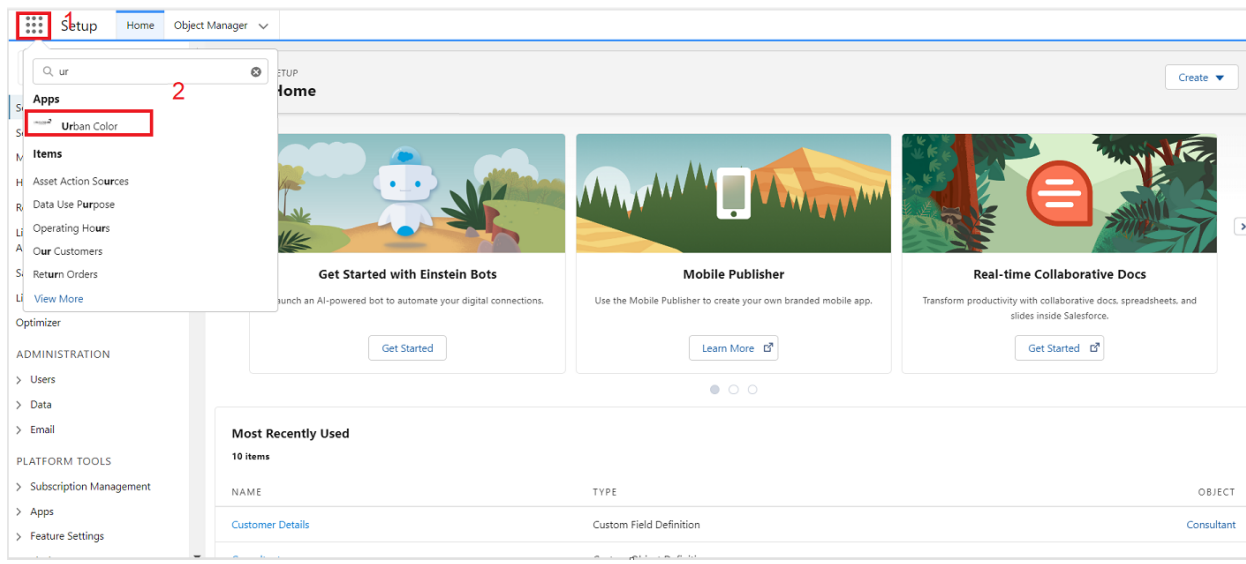
Usage: These reports were used to track sales performance and inventory management.

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



Edit Bucket Column

* Field

Payment

×

* Bucket Name

Payment type

All Values (4)

Bucket Name

2

Unbucketed Values (4)

☐ Bucket remaining values as Other

1

Add Bucket

Search Values

Q

☐ VALUE

BUCKET

☐ Credit Card

☐ Debit Card

☐ Upi

☐ Cash

Move To

▼

Cancel

Apply

Edit Bucket Column

* Field

Payment

×

* Bucket Name

Payment type

All Values (4)

Unbucketed Values (4)

☐ Bucket remaining values as Other

Add Bucket

Search Values

Q

☐ VALUE

BUCKET

☐ Credit Card

☐ Debit Card

☐ Upi

☐ Cash

Move To

▼

Cancel

Apply

Edit Bucket Column

* Field

Payment

×

* Bucket Name

Payment type

All Values (4)

Net Banking (0)

Cash (0)

Unbucketed Values (4)

☐ Bucket remaining values as Other

Add Bucket

Search Values

Q

☐ VALUE

BUCKET

☐ Credit Card

☐ Debit Card

☐ Upi

☐ Cash

Move To

▼

Cancel

Apply

Edit Bucket Column

* Field

Payment

* Bucket Name

Payment type

All Values (4)

Net Banking (0)

Cash (0)

Unbucketed Values (4)

Search Values

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

☐ Bucket remaining values as Other

Add Bucket

Move To

Cancel

Apply

Edit Bucket Column

* Field

Payment

* Bucket Name

Payment type

All Values (4)

Net Banking (3)

Cash (0)

Unbucketed Values (1)

Search Values

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

☐ Bucket remaining values as Other

Add Bucket

Move To

Cancel

Apply

Edit Bucket Column

* Field

Payment

* Bucket Name

Payment type

All Values (4)

Net Banking (3)

Cash (1)

Unbucketed Values (0)

Search Values

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

☐ Bucket remaining values as Other

Add Bucket

Move To

Cancel

Apply

14.In Group Rows Add Payment Type Bucket Field.

15.Click refresh

16.Click Save and Run

17.Give report name – Consultant report

18.Click Save

REPORT ▾
New Consultants Report **Consultants**

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

Fields > Outline Filters

Groups

GROUP ROWS

Add group...

Columns

Add column...

Consultant: Consultant Name x

Delivery Type x

Products x

Payment x

Payment type x

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

REPORT ▾
New Consultants Report **Consultants**

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

Fields > Outline Filters

Groups

GROUP ROWS

Add group...

Payment type x

GROUP COLUMNS

Add group...

Columns

Add column...

Consultant: Consultant Name x

Delivery Type x

Products x

Payment x

Payment type ↑

Net Banking (7)

Ajith

Babu

Chitra

Swathi

Prasad

Ajay Kumar

Sandeep

Subtotal

Cash (2)

Dev Raj

Shankar

Subtotal

Total (9)

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

Save Report

* Report Name 1
Consultants Report

Report Unique Name ⓘ
Consultants_Report_hvb

Report Description

Folder 2
Private Reports

Select Folder

Cancel Save 3

Purpose: Dashboards provide real-time insights into store performance and inventory

Urban Color

Our Customers ▾ Consultants ▾ Retailers ▾ others ▾ Reports ▾ Dashboards ▾

Consultant Dashboard

+ Component + Filter ↶ ↷ ⚙ Save Done

Consultants Report

Record Count

Payment Type

Net Banking 7

Cash 2

View Report (Consultants Report)

Payment Type	Record Count
Net Banking	7
Cash	2

Conclusion

The Cosmetics Store Management solution in Salesforce helps cosmetics stores streamline operations, enhance customer relationships, and increase sales through effective CRM, inventory management, and reporting capabilities. This implementation ensures that store managers have the tools they need to make data-driven decisions and improve overall business performance.

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