

Cosmetic Store Management

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1. Introduction

1.1 Project Overview

This document outlines the project documentation for a Salesforce-based cosmetic store management system. The system is designed to streamline operations, provide valuable insights, and enhance decision-making for the cosmetic store.

1.2 Project Objectives

- Import and manage consultant data, including ConsultantName, DeliveryType, Products, and Payment details.
- Create reports to analyze consultant performance, delivery efficiency, product popularity, and payment trends.
- Develop interactive dashboards to visualize key metrics and trends.

1.3 Project Scope

The project scope includes the following key components:

- Data import and validation
- Report creation and customization
- Dashboard design and development

2. System Requirements

2.1 Hardware Requirements

- Sufficient computing power to handle data processing and reporting.
- Adequate storage capacity for data storage and backups.
- Internet connectivity for accessing Salesforce and external systems.

2.2 Software Requirements

- Salesforce platform with appropriate licenses and permissions.
- Data Loader for importing data into Salesforce.
- Report Builder for creating custom reports.
- Dashboard Builder for designing interactive dashboards.

3. Data Import and Validation

- **Data Loader:** Use Salesforce Data Loader to import data from external sources (e.g., spreadsheets, databases) into the custom objects.
- **Data Validation:** Implement data validation rules to ensure data integrity and consistency during import.

4. Reporting and Analysis

- **Standard Reports:** Utilize Salesforce's standard reports to analyze consultant data, including ConsultantName, DeliveryType, Products, and Payment details.
- **Custom Reports:** Create custom reports using Report Builder to address specific business needs.
- **Report Types:** Define report types to specify the objects and fields included in reports.

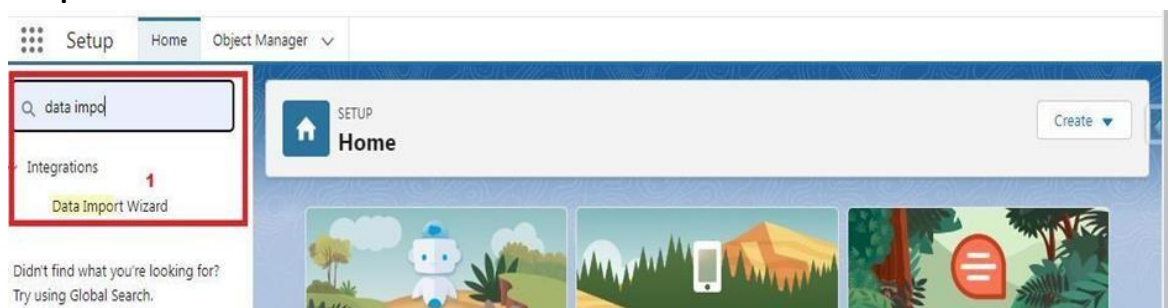
5. Dashboard Development

- Dashboard Builder: Use Salesforce's Dashboard Builder to create interactive dashboards.
- Dashboard Components: Utilize various components (e.g., charts, tables, metrics) to visualize data.
- Dashboard Filters: Apply filters to customize dashboard views based on specific criteria.

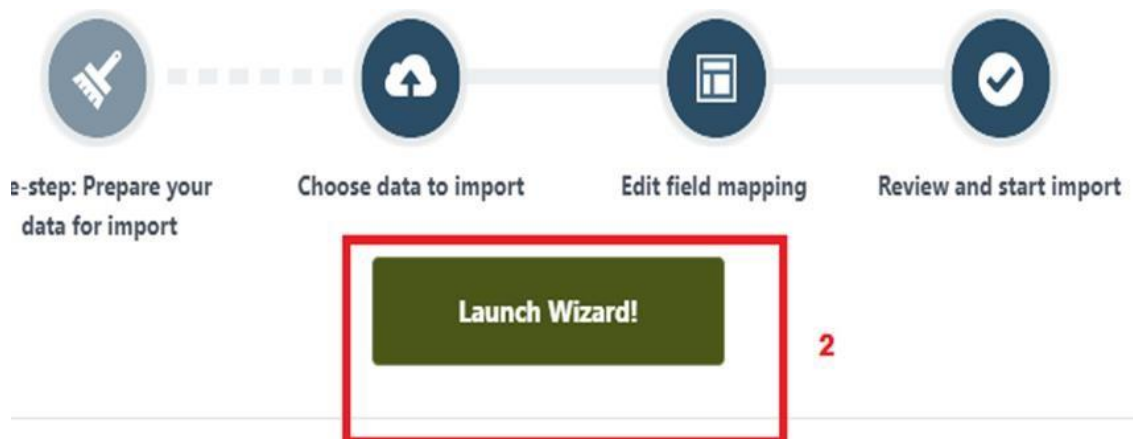
Steps for Importing Data

To Import Data

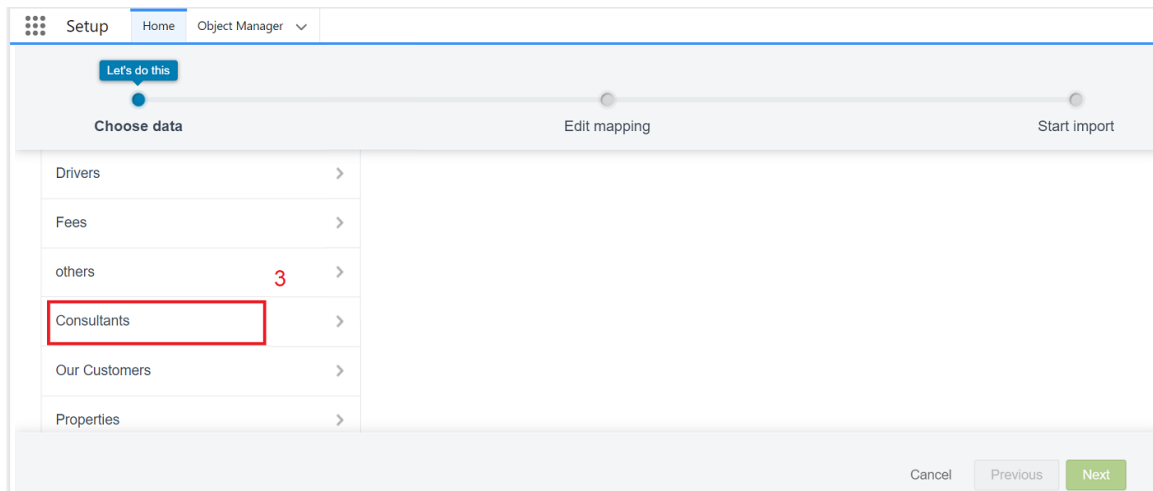
1. From Setup, click the Home tab.
2. In the Quick Find box, enter Data Import and select Data Import Wizard



3. Click Launch Wizard!



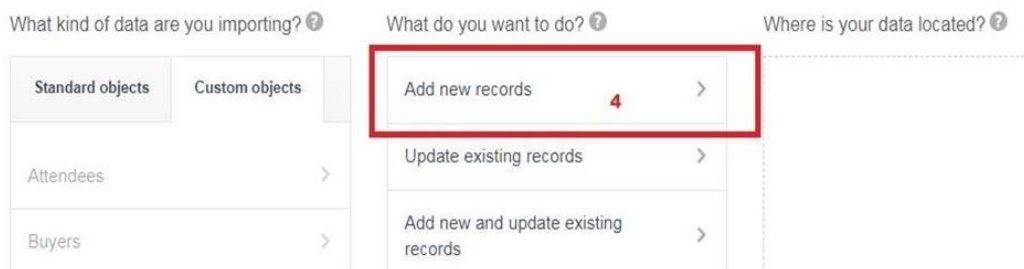
4. Click the Custom Objects tab and select the Consultant object.



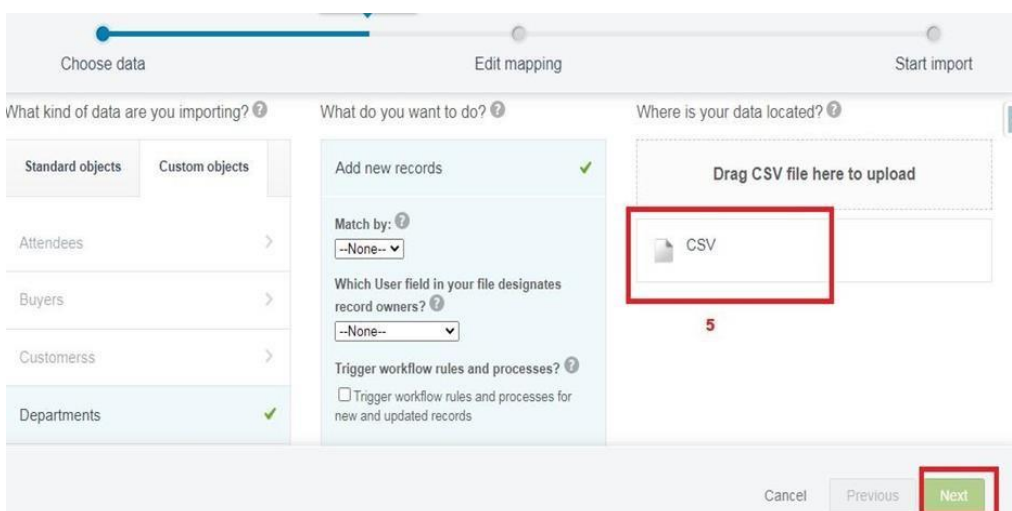
5. Select Add new records.

Import your Data into Salesforce

You can import up to 50,000 records at a time.



6. Click CSV and choose file Consultant_CSV which we made earlier. Click Next.



7. 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.

Setup Home Object Manager

Almost done

Choose data Edit mapping Start import

Edit Field Mapping: Consultants

Your file has been auto-mapped to existing Salesforce fields, but you can edit the mappings if you wish. Unmapped fields will not be imported.

Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	Consultant Name	Consultant Name	Dev Raj	Ajith	Babu
Change	Mobile Number	Mobile Number	984638732	784653673	902839439
Change	Delivery Type	Delivery Type	Self Pickup	Courier	Self Pickup
Change	Address	Address		Hyderabad	
Change	Products	Products	Lipstick	Compact	Face Pack
Change	Payment	Payment	Cash	Upi	Credit Card
Change	Email	Email		ajith@gmail.com	Babu34@gmail.com

Cancel Previous Next

8. The next screen gives you a summary of your data import. Click Start Import.

Great job

Choose data Edit mapping Start import

Review & Start Import

Review your import information and click Start Import.

Your selections:

- Consultants ✓
- Add new records ✓
- Consultants - Sheet1 (2).csv ✓

Your import will include:

Mapped fields

7

Your import will not include:

Unmapped fields

0

Cancel Previous Start Import

9. 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

10. 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
View Request	View Result	751dM000004D5UD	25/09/2024, 8:53 pm	25/09/2024, 8:53 pm	54	25	0	6	0	0		Completed

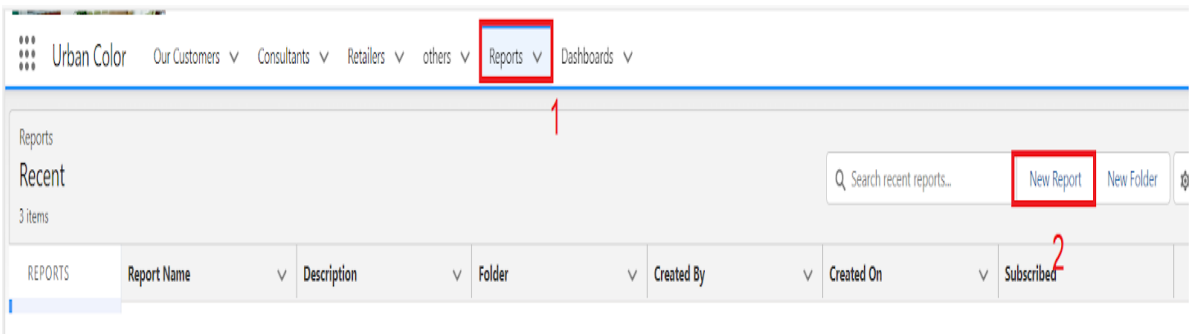
11. Make sure you have 0 records under the records failed column.

Note - Do Field mapping carefully.

Steps for Creating Report

Create Report

- 1.Click App Launcher
- 2.Select Urban Color App
- 3.Click reports tab
- 4.Click New Report.



Report: Consultants
Consultant report

17

Payment type	Delivery Type	Products	Payment	Customer Name
NetBanking (12)	Self Pickup	Lipstick	Debit Card	vsk
	Courier	Compact	Credit Card	cefs
	Self Pickup	EyeLiner	UPI	rcdtrh
	Courier	Lip Balm	Credit Card	cgrtrh
	Self Pickup	Lipstick	Debit Card	vsk
	Courier	Compact	Credit Card	cefs
	Self Pickup	EyeLiner	UPI	rcdtrh
	Courier	Lip Balm	Credit Card	cgrtrh
	Self Pickup	Lipstick	Debit Card	vsk
	Courier	Compact	Credit Card	cefs
	Self Pickup	EyeLiner	UPI	rcdtrh
	Courier	Lip Balm	Credit Card	cgrtrh
Subtotal				
Cash (5)	Courier	FacePack	Cash	rgtr
	Self Pickup	Nail Polish	Cash	hbrytj
	Self Pickup	Nail Polish	Cash	hbrytj
	Courier	FacePack	Cash	rgtr
	Self Pickup	Nail Polish	Cash	hbrytj
Subtotal				
Total (17)				

Row Counts: ☒ Detail Rows: ☒ Subtotals: ☒ Grand Total: ☒

Edit Bucket Column

* Field:

* Bucket Name:

All Values (4)

Net Banking (0)

Cash (0)

Unbucketed Values (4)

☐ Bucket remaining values as Other

Add Bucket

Search Values

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

Move To

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

☐ Bucket remaining values as Other

Add Bucket

Search Values

Q

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

Move To

▼

Cancel

Apply

Edit Bucket Column

* Field

Payment
×

* Bucket Name

Payment type

All Values (4)

Net Banking (3)

Cash (1)

Unbucketed Values (0)

☐ Bucket remaining values as Other

Search Values

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

Add Bucket

Move To ▼

Cancel

Apply

5.In Group Rows Add Payment Type Bucket Field.

6.Click refresh

7.Click Save and Run

8.Give report name – Consultant report

9.Click Save

Steps for Creating Dashboard

Create Dashboard

1. Click on the Dashboards tab from the Urban Color application.
2. Click on the new dashboard.

3. Give name- Consultant Dashboard

4. Click create

Add Component

Report

Consultants Report

☐ Use chart settings from report

Display As

Y-Axis

Payment type

X-Axis

Record Count

Preview

Consultants Report

Record Count

0 2 4 6 8

Payment type

Net Banking 7

Cash 2

View Report (Consultants Report)

Cancel

Add

