

URBAN COLOR MANAGEMENT SYSTEM

Empowering Colorful Cities

Developed by:

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Abstract

Urban Color Management System is a specialized Customer Relationship Management (CRM) application designed to manage and coordinate color schemes within urban environments. With the growing emphasis on aesthetic appeal in city planning, managing the diversity of colors across various urban structures—such as buildings, public spaces, and street furniture—has become a complex task. This system provides a comprehensive solution for city planners, architects, and urban developers to maintain and update color schemes effectively.

The system offers features like color palette management, project tracking, and stakeholder communication, all within an intuitive interface. By integrating with existing urban planning tools, the Urban Color Management System enhances collaboration between different teams and ensures consistent color application across projects.

Key benefits include improved efficiency in project management, better communication among stakeholders, and the ability to maintain a cohesive visual identity across urban spaces. This system aims to contribute to the creation of visually appealing cities that reflect a harmonious blend of tradition and modernity.

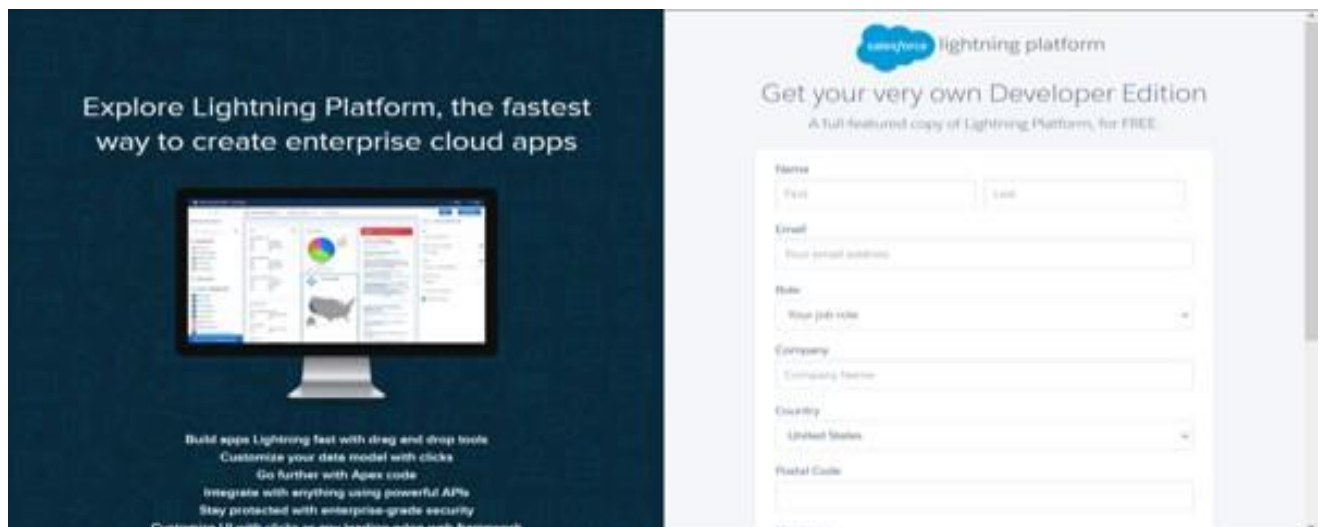
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1. Creating a Developer Account in Salesforce

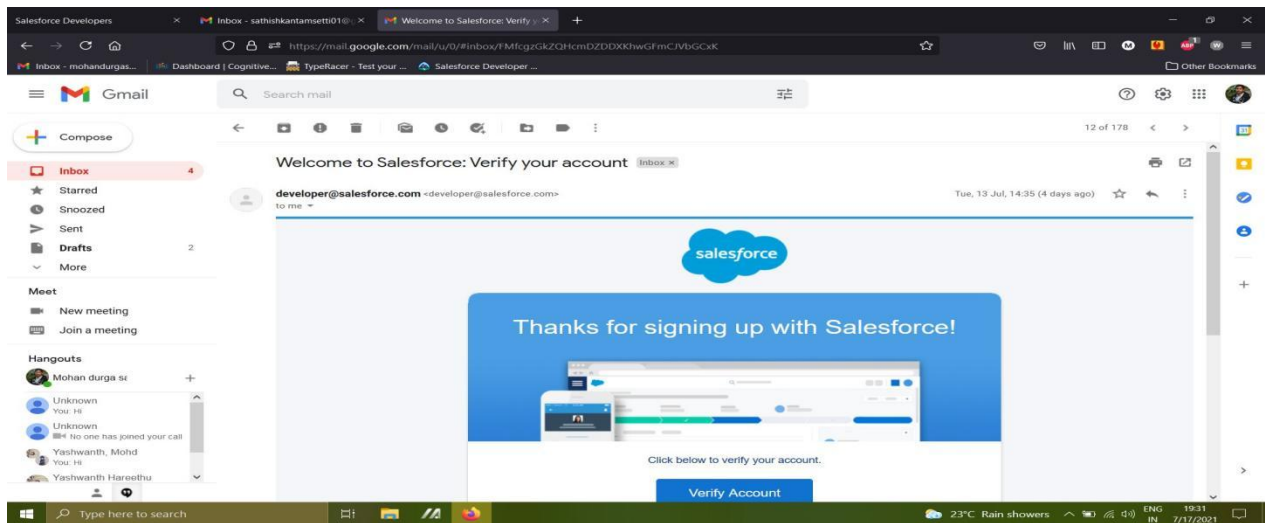
Step 1: Sign Up for a Developer Org

1. Go to developers.salesforce.com/signup.
2. Click on "Sign Up."
3. Fill out the Sign-Up Form with the following details:
 - First Name & Last Name
 - Email
 - Role: Developer
 - Company: [Your College Name]
 - Country: India
 - Postal Code: [Your Pin Code]
 - Username: Create a username using a combination of your name and company. This does not need to be a valid email; you can format it as username@organization.com.
4. Click on "Sign Up" after filling in all the details.



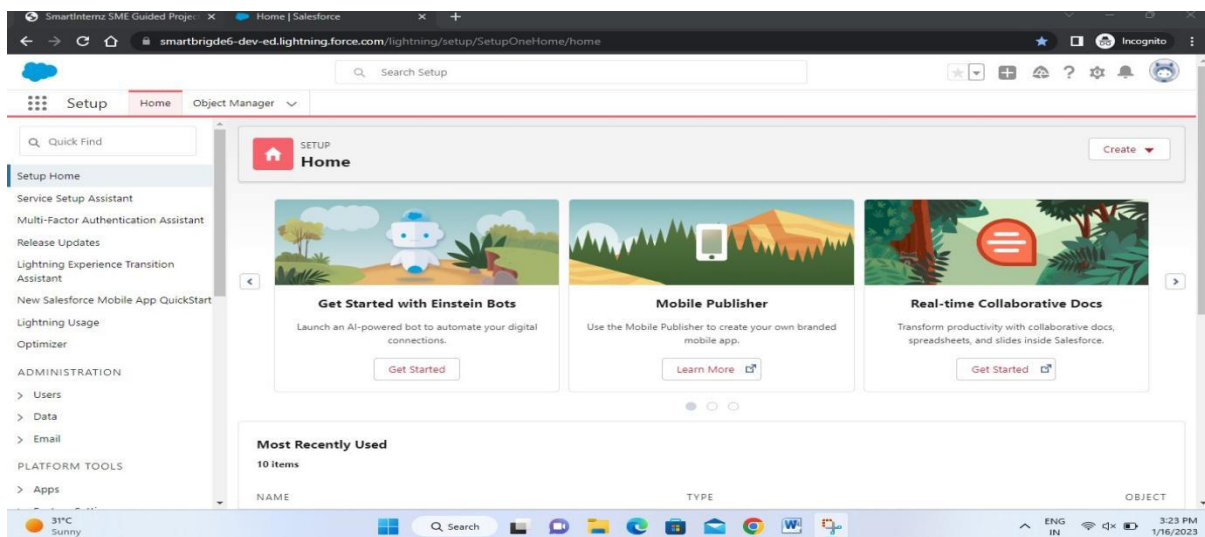
Step 2: Account Activation

1. Go to your email inbox that you used for signing up.
2. Find the verification email from Salesforce and click on the "Verify Account" link to activate your account.
 - Note: The email might take 5-10 minutes to arrive.



Step 3: Login to Your Salesforce Account

1. Go to login.salesforce.com.
2. Enter your username and password created during the sign-up process.
3. Login to access your Salesforce Developer account.
 - You will see the home page after logging in.



2. Salesforce Objects

Salesforce objects are database tables that allow you to store data specific to an organization. Objects in Salesforce are of two types:

1. **Standard Objects:** These are the pre-built objects provided by Salesforce, such as Users, Contracts, Reports, Dashboards, and more. Standard objects form the foundation of Salesforce's data structure and cover common business scenarios.
2. **Custom Objects:** These are user-defined objects created to store data that is unique to your organization's needs. In the context of the Urban Color Management System, examples of custom objects include **Our Customers, Consultants, Retailers, and Others**.

2.1. Creating Objects for Urban Color Management

In the Urban Color Management System, we need to create three custom objects: **Our Customers, Consultants, Retailers, and Others**. The following steps will guide you through the process of creating these objects in Salesforce.

Step 1: Access Setup

1. **Click on the gear icon** in the upper-right corner of Salesforce.
2. **Select "Setup"** from the dropdown menu.

Step 2: Open Object Manager

1. **Click on the "Object Manager"** tab located next to the Home tab.

Step 3: Create a Custom Object

1. On the **Object Manager** page, look to the right side of the screen.
2. **Click on the "Create" dropdown** and select **Custom Object**.

Step 4: Create "Our Customer" Object

1. On the **Custom Object Definition** page, enter the following details:
 - **Label:** Our Customer
 - **Plural Label:** Our Customers

- **Record Name:** Our Customer
- 2. **Check the following boxes:**
 - **Allow Reports**
 - **Allow Search**
- 3. **Click "Save"** to create the object.

Step 5: Create a Custom Tab for "Our Customer"

1. **Click the "Home" tab** and enter "Tabs" in the Quick Find search bar.
2. **Select "Tabs"** from the search results.
3. Under **Custom Object Tabs**, click **New**.
4. For **Object**, select **Our Customer**.
5. For **Tab Style**, select any icon that represents your object.
6. Leave all other settings as defaults and click **Next**.
7. **Click "Next"** again, then **Save**.

2.2. Creating the Consultants Object

The following steps will guide you through the process of creating the **Consultants** object in Salesforce.

Step 1: Access Setup

1. **Click on the gear icon** in the upper-right corner of Salesforce.
2. **Select "Setup"** from the dropdown menu.

Step 2: Open Object Manager

1. **Click on the "Object Manager"** tab located next to the Home tab.

Step 3: Create a Custom Object

1. On the **Object Manager** page, look to the right side of the screen.
2. **Click on the "Create" dropdown** and select **Custom Object**.

Step 4: Create "Consultants" Object

1. On the **Custom Object Definition** page, enter the following details:
 - **Label:** Consultant
 - **Plural Label:** Consultants
 - **Record Name:** Consultant
2. **Check the following boxes:**
 - **Allow Reports**
 - **Allow Search**
3. Click **"Save"** to create the object.

Step 5: Create a Custom Tab for "Consultants"

1. Click the **"Home"** tab and enter "Tabs" in the Quick Find search bar.
2. Select **"Tabs"** from the search results.
3. Under **Custom Object Tabs**, click **New**.
4. For **Object**, select **Consultants**.
5. For **Tab Style**, select any icon that represents your object.
6. Leave all other settings as defaults and click **Next**.
7. Click **"Next"** again, then **Save**.

2.3. Creating the Retailers Object

The following steps will guide you through the process of creating the **Retailers** object in Salesforce.

Step 1: Access Setup

1. Click on the gear icon in the upper-right corner of Salesforce.
2. Select "Setup" from the dropdown menu.

Step 2: Open Object Manager

1. Click on the "Object Manager" tab located next to the Home tab.

Step 3: Create a Custom Object

1. On the **Object Manager** page, look to the right side of the screen.
2. Click on the "Create" dropdown and select **Custom Object**.

Step 4: Create "Retailers" Object

1. On the **Custom Object Definition** page, enter the following details:
 - **Label:** Retailer
 - **Plural Label:** Retailers
 - **Record Name:** Retailer
2. Check the following boxes:
 - **Allow Reports**
 - **Allow Search**
3. Click "Save" to create the object.

Step 5: Create a Custom Tab for "Retailers"

1. Click the "Home" tab and enter "Tabs" in the Quick Find search bar.
2. Select "Tabs" from the search results.
3. Under **Custom Object Tabs**, click **New**.
4. For **Object**, select **Retailers**.
5. For **Tab Style**, select any icon that represents your object.

6. Leave all other settings as defaults and click **Next**.
7. Click **"Next"** again, then **Save**.

2.4. Creating the Others Object

The following steps will guide you through the process of creating the **Others** object in Salesforce.

Step 1: Access Setup

1. Click on the **gear icon** in the upper-right corner of Salesforce.
2. Select **"Setup"** from the dropdown menu.

Step 2: Open Object Manager

1. Click on the **"Object Manager"** tab located next to the Home tab.

Step 3: Create a Custom Object

1. On the **Object Manager** page, look to the right side of the screen.
2. Click on the **"Create"** dropdown and select **Custom Object**.

Step 4: Create "Others" Object

1. On the **Custom Object Definition** page, enter the following details:
 - **Label:** Other
 - **Plural Label:** Others
 - **Record Name:** Other
2. Check the following boxes:
 - **Allow Reports**
 - **Allow Search**
3. Click **"Save"** to create the object.

Step 5: Create a Custom Tab for "Others"

1. Click the **"Home"** tab and enter **"Tabs"** in the Quick Find search bar.
2. Select **"Tabs"** from the search results.

3. Under **Custom Object Tabs**, click **New**.
4. For **Object**, select **Others**.
5. For **Tab Style**, select any icon that represents your object.
6. Leave all other settings as defaults and click **Next**.
7. Click **"Next"** again, then **Save**.

3. Fields and Relationships

In Salesforce, an object relationship is a two-way association between two objects, allowing users to connect and interact with related data across different objects. This relationship is established by creating custom relationship fields on an object. These relationship fields enable users to view records and seamlessly access related information, providing a comprehensive view of data across the Salesforce environment.

By using relationships, Salesforce ensures that all related data is interconnected, making it easier for users to navigate between related records, improving data consistency, and enhancing the overall user experience.

3.1. Fields in the "Our Customers" Object

The following fields are defined in the "Our Customers" object, each with a specific data type:

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

3.2. Fields in Consultants objects

The following fields are defined in the "Consultants" object, each with a specific data type:

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	Multi-Picklist
	2)Compact 3)EyeLiner 4)FacePack 5)Lip Balm 6)Nail Polish	
7	Payment 1)Debit Card 2)Credit Card 3)UPI 4)Cash	Picklist
8	Customer details	Lookup(Our Customers Object)
9	Address	Text Long

3.3. Fields in Retailers objects

The following fields are defined in the "Retailers" object, each with a specific data type:

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)

3.4. Fields in Others objects

The following fields are defined in the "Others" object, each with a specific data type:

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

In Salesforce, page layouts define the organization and arrangement of fields, buttons, related lists, and other components on an object's detail and edit pages. They allow you to control the user interface and tailor it to meet the specific needs of your organization.

Page Layout Creation

1. From the Salesforce setup menu, go to "**Object Manager**" and select the **Consultants** object.
2. Click on "**Page Layouts**" in the left sidebar. This will display a list of available page layouts for the selected object.
3. Select the **Consultant Layout** page layout

The screenshot shows the Salesforce Page Layouts interface for the 'Consultant' object. The left sidebar contains a list of options: Details, Fields & Relationships, Page Layouts (highlighted with a red box and a red '1'), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Page Layouts' and shows '1 Items, Sorted by Page Layout Name'. A table lists the available layouts:

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Consultant Layout (highlighted with a red box and a red '2')	Hazari Ajay Kumar, 4/1/2023, 7:25 AM	Hazari Ajay Kumar, 6/18/2023, 10:30 PM

At the bottom of the page, there is a URL: thesmartbridgecom2-dev-ed.develop.lightning.force.com/lightning/.../view

4. Click and drag the **Delivery Type** and **Address** fields below the **Phone** field.

SETUP > OBJECT MANAGER

Consultant

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Quick Find Field Name

Fields

Buttons

Quick Actions

Mobile & Lightning Actions

Expanded Lookups

Related Lists

Report Charts

Section	Created By	Owner	Products
Blank Space	Customer id	Payment	
Address	Delivery Type	Phone	
Consultant Name	Last Modified By	Preferred Item	

Information (Header visible on edit only)

Customer id GEN-2004-001234 Owner Sample Text

Consultant Name Sample Text

Phone 1-415-555-1212

Preferred Item Sample Text

Products Sample Text

Payment Sample Text

Delivery Type Sample Text

Address Sample Text

5. Click on **Save**.

Setup Home Object Manager

SETUP > OBJECT MANAGER

Consultant

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Quick Find Field Name

Fields

Buttons

Quick Actions

Mobile & Lightning Actions

Expanded Lookups

Related Lists

Report Charts

Section	Created By	Owner	Products
Blank Space	Customer id	Payment	
Address	Delivery Type	Phone	
Consultant Name	Last Modified By	Preferred Item	

Information (Header visible on edit only)

Customer id GEN-2004-001234 Owner Sample Text

Consultant Name Sample Text

Phone 1-415-555-1212

Delivery Type Sample text

Address Sample Text

Preferred Item Sample Text

Products Sample Text

Payment Sample Text

5. The Lightning App

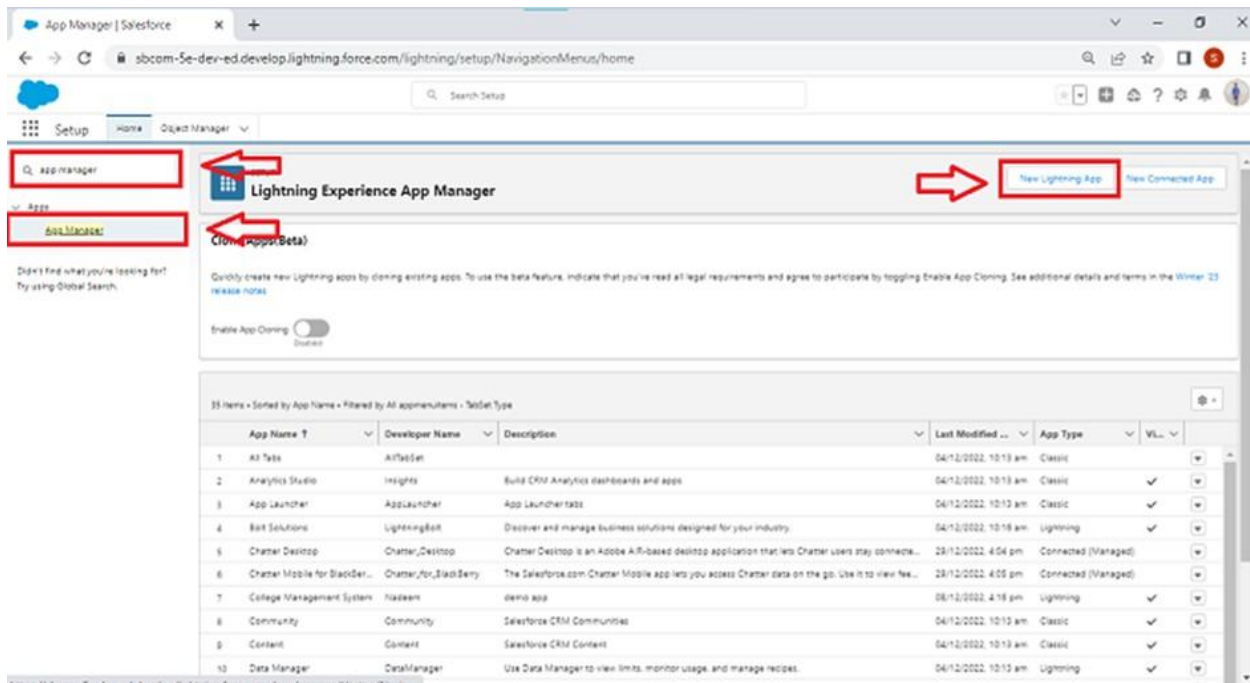
An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

Lightning apps let you brand your apps with a custom Color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your org can work more efficiently by easily switching between apps.

5.1. Create a Lightning App

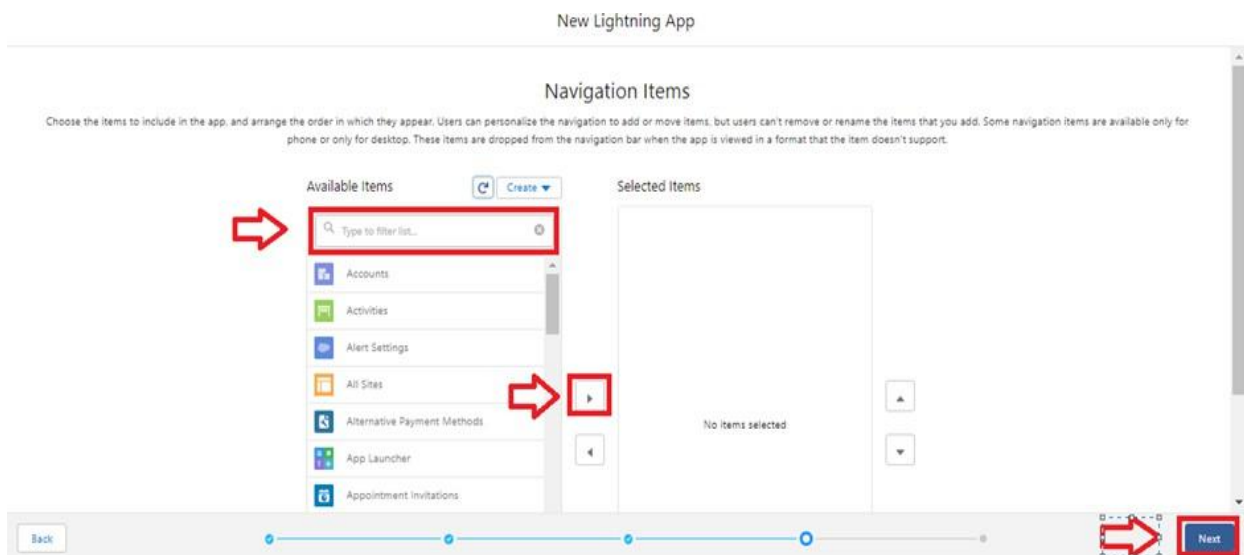
To create a Lightning app page:

1. Go to the **Setup** page.
2. In the **Quick Find** search bar, type “**App Manager**” and select “**App Manager.**”
3. Click on **New Lightning App**.
 - Fill the app name as **Urban Color** in **App Details and Branding**.
 - Click **Next**.
 - On the **App Options** page, keep the settings as default.
 - Click **Next**.
 - On the **Utility Items** page, keep the settings as default.
 - Click **Next**.



To Add Navigation Items:

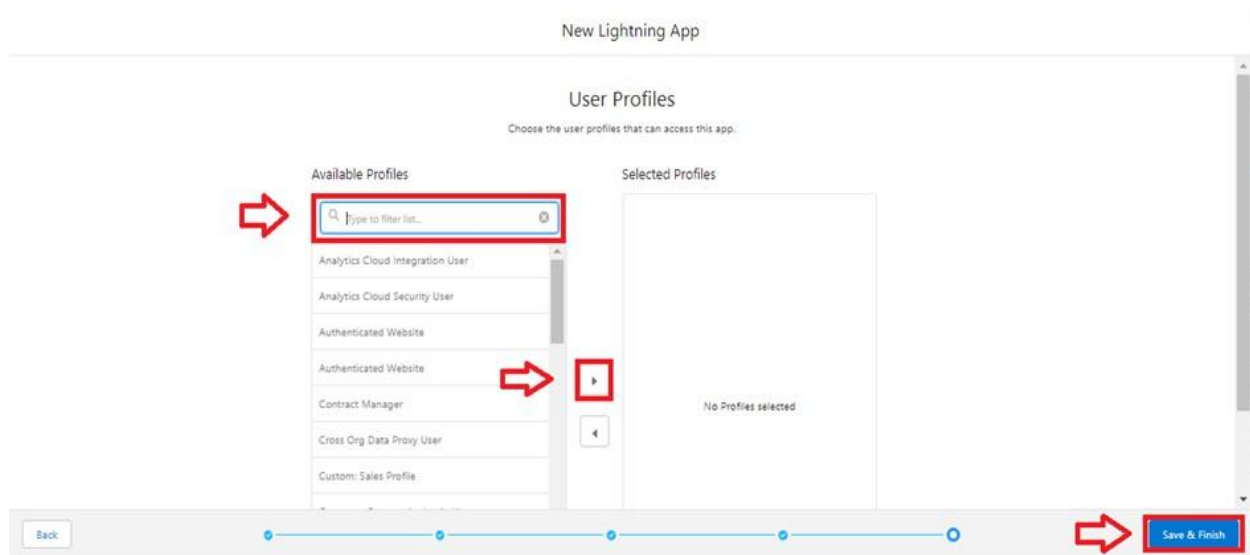
1. Select the items (**Our Customers, Consultants, Retailers, Others, Reports, Dashboards**) from the search bar and move them using the arrow button.
2. Click **Next**.



To Add User Profiles:

1. Search for **profiles (System Administrator)** in the search bar.

2. Click on the arrow button to add the profile.
3. Click **Save & Finish**.



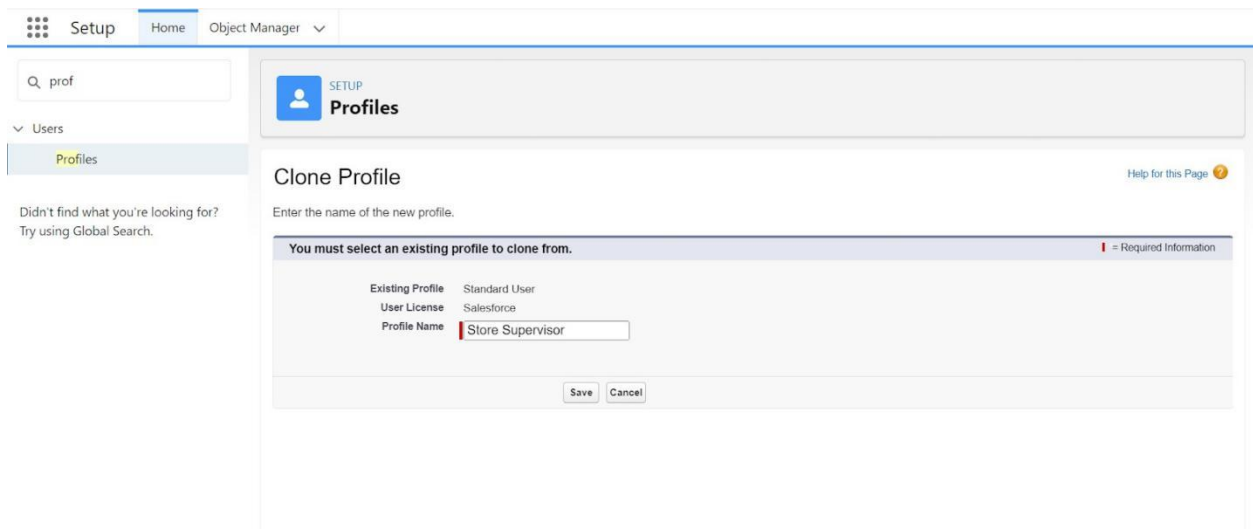
6. Profile

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.

6.1. Creating a Profile

Creating a Store Supervisor Profile and Setting Object Permissions:

1. From **Setup**, enter **Profiles** in the **Quick Find** box, and select **Profiles**.
2. From the list of profiles, find **Standard User**.
3. Click **Clone**.
4. For **Profile Name**, enter **Store Supervisor**.
5. Click **Save**.



The screenshot shows the Salesforce Setup interface. On the left, the 'Setup' menu is open, and 'Profiles' is selected under the 'Users' section. The main content area displays the 'Clone Profile' dialog box. The dialog box has a title bar 'Clone Profile' and a subtitle 'Enter the name of the new profile.' Below this, there is a message: 'You must select an existing profile to clone from.' A table lists the existing profiles: 'Standard User' with 'Salesforce' as the user license. The 'Profile Name' field is highlighted in red and contains the text 'Store Supervisor'. At the bottom of the dialog box, there are 'Save' and 'Cancel' buttons.

6. While still on the **Store Supervisor** profile page, click **Edit**.
7. Scroll down to **Custom Object Permissions** and give access for **Create, Read, Edit, Delete, View All, and Modify All** for the **Our Customers, Consultants, Retailers, Others** objects.

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.

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 Custom Profile ✓
Description	

Setup Home Object Manager ▾

Q prof

Users

Profiles

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

Profiles

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

Service Provider Access

Tab Settings

☐ Overwrite users' personal tab customizations

8. Scroll down to **Custom App Settings** and give access to **Urban Color**.
9. Click on **Save**.

To Create a New Profile:

1. Go to **Setup**.
2. Type **Profiles** in the **Quick Find** box.
3. Click on **Profiles**.
4. Clone the desired profile (**Standard User** is preferable).
5. Enter the **Profile Name**.
6. Click **Save**.
7. While still on the profile page, 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.

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 Custom Profile ✓
Description	

8. Scroll down to the **Custom Object Permissions** and give all access to the **Consultants, Others, Our Customers, Retailers** objects.
9. Click on **Save**.

SETUP Profiles

Object	Read	Create	Edit	Delete	Transfer	Share
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"/>

Similarly, Create an Operator Profile:

1. Clone the **Salesforce Platform** user profile.
2. Give access only for **Billing Operator**.

Profile Edit

Billing Operator

[Help for this Page](#)

Set the permissions and page layouts for this profile.

Profile Edit

[Save](#) [Save & New](#) [Cancel](#)

Name

User License

Custom Profile ☒

Description

ALLOW GRANT FOR employees



Password Policies

User passwords expire in

Enforce password history

Minimum password length

Password complexity requirement

Password question requirement

Maximum invalid login attempts

Lockout effective period

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](#)

3. Click on **Save**.

7. Setup Roles

Roles are record-level access controls that define what data a user can see in Salesforce.

Setup 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 in the **Label** as **Store Head**, and the **Role Name** as **Store_Head**.
9. Enter a **Role Name** that will be displayed on reports.
10. Click on **Save**.

Similarly, create one role under Store Head as **Billing Operator**.

The screenshot displays the Salesforce Setup interface for creating a new role. The left sidebar shows the navigation menu with 'Roles' highlighted under the 'Users' section. The main content area is titled 'Role Edit' and 'New Role'. The form contains the following fields:

- Label:** Store Head
- Role Name:** Store_Head
- This role reports to:** thesmartbridge.com
- Role Name as displayed on reports:** (empty field)

At the bottom of the form, there are three buttons: **Save**, **Save & New**, and **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

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

SETUP

Roles

Role Edit

New Role

Help for this Page

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

Your Organization's Role Hierarchy

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



8. Users

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account.

Creating a User:

1. From **Setup**, in the **Quick Find** box, enter **Users**, and then select **Users**.
2. Click **New User**.
3. Enter the user's name as **Amar K** and your email address, and create a unique username in the form of an email address. By default, the username is the same as the email address.
4. Select a **Role** as **Store Head**.
5. Select a **User License** as **Salesforce**.
6. Select a **Profile** as **Store Supervisor**.
7. Check **Generate new password and notify the user immediately** to have the user's login name and a temporary password emailed to your email.
8. Fill in the fields (First Name, Last Name, Alias, Email ID, Username, Nickname, Role, User License, Profile).
9. Click **Save**.

The screenshot shows the Salesforce Setup interface for creating a new user. The left sidebar contains a search bar with 'use' entered and a list of navigation items: Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users (highlighted). The main content area is titled 'User Edit' and includes buttons for 'Save', 'Save & New', and 'Cancel'. Below the title is the 'General Information' section, which contains two columns of fields. The first column includes First Name (Amar), Last Name (k), Alias (ak), Email (mailid@gmail.com), Username (amark2133@salesforce.cor), Nickname (User167161323313747430), Title (Store Supervisor), Company, Department, and Division. The second column includes Role (Store Head), User License (Salesforce), Profile (Store Supervisor), Active (checked), Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, and Data.com User Type (None). A red exclamation mark icon indicates required information.

General Information	
First Name	Amar
Last Name	k
Alias	ak
Email	mailid@gmail.com
Username	amark2133@salesforce.cor
Nickname	User167161323313747430
Title	Store Supervisor
Company	
Department	
Division	
Role	Store Head
User License	Salesforce
Profile	Store Supervisor
Active	<input checked="" type="checkbox"/>
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>
Site.com Publisher User	<input type="checkbox"/>
WDC User	<input type="checkbox"/>
Data.com User Type	--None--

Setup Home Object Manager

use

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Process Automation

Delayed And Failed Flow

SETUP Users

Single Sign On Information

Federation ID

Locale Settings

Time Zone (GMT-07:00) Pacific Daylight Time (America/Los_Angeles)

Locale English (United States)

Language English

Approver Settings

Delegated Approver

Manager

Receive Approval Request Emails Only if I am an approver

☐ Generate new password and notify user immediately

Save Save & New Cancel

Second User Creation:

1. From **Setup**, in the **Quick Find** box, enter **Users**, and then select **Users**.
2. Click **New User**.
3. Enter the user's name as **John Teddy** and your email address, and create a unique username in the form of an email address. By default, the username is the same as the email address.
4. Select a **Role** as **Billing Operator**.
5. Select a **User License** as **Salesforce Platform**.
6. Select a **Profile** as **Billing Operator**.
7. Check **Generate new password and notify the user immediately** to have the user's login name and a temporary password emailed to your email.
8. Fill in the fields (First Name, Last Name, Alias, Email ID, Username, Nickname, Role, User License, Profile).
9. Click **Save**.

Setup

Home

Object Manager

Search Setup

Setup

Users

Search user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

User Interface

Action Link Templates

Actions & Recommendations

App Menu

Custom Labels

Density Settings

Global Actions

SETUP

Users

User Edit

Save

Save & New

Cancel

General Information

First Name

Last Name

Alias

Email

Username

Nickname

Title

Company

Department

Division

Role

User License

Profile

Active

Marketing User

Offline User

Knowledge User

Flow User

Service Cloud User

Site.com Contributor User

Site.com Publisher User

WDC User

Data.com User Type

Data.com Monthly Addition Limit

Accessibility Mode (Classic Only)

High-Contrast Palette on Charts

Load Lightning Pages While Scrolling

Debug Mode

Make Setup My Default Landing Page

Setup

Home

Object Manager

Search use

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Process Automation

Paused And Failed Flow

SETUP

Users

Single Sign On Information

Federation ID

Locale Settings

Time Zone

Locale

Language

Approver Settings

Delegated Approver

Manager

Receive Approval Request Emails

Generate new password and notify user immediately

Save

Save & New

Cancel

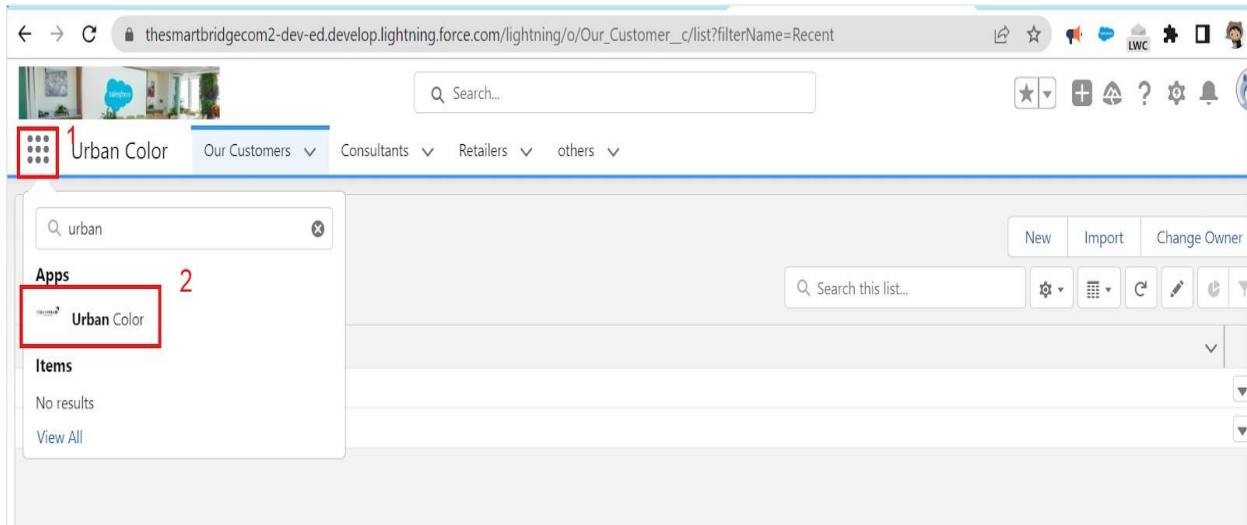
9. User Adoption

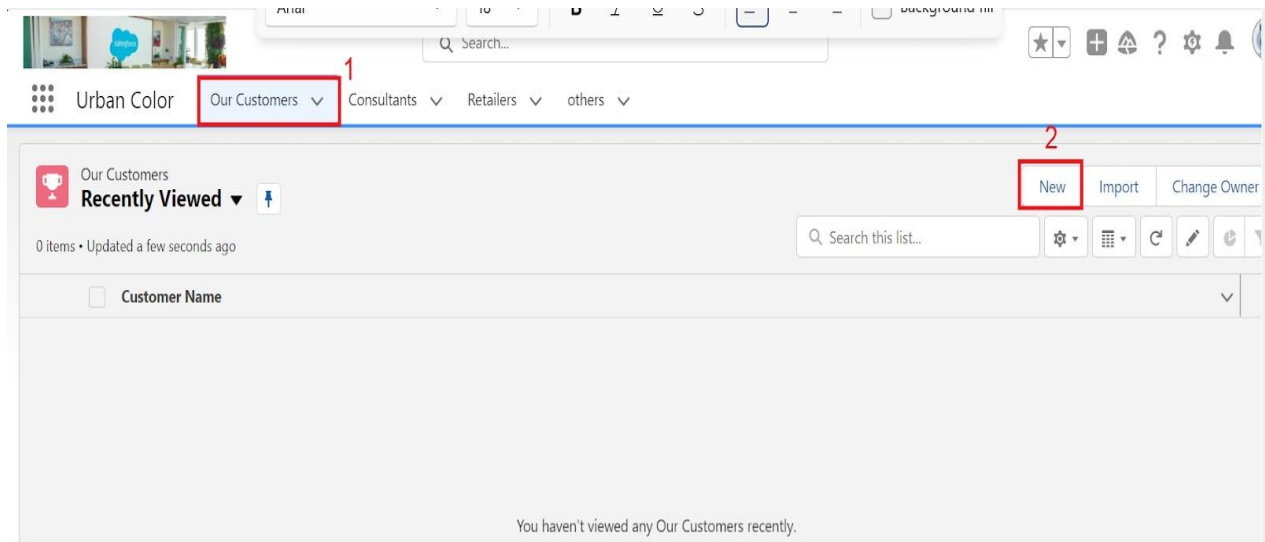
We need to understand user adoption and navigation. How to interact with database and their records.

To ensure effective **user adoption** and navigation, it's important to educate users on how to interact with the Salesforce database and manage records. The following steps outline key areas to focus on:

Create Our Customer Record

1. Click on the **App Launcher** on the left side of the screen.
2. Search for **Urban Color** and click on it.
3. Click on the **Our Customer** tab.
4. Click the **New** button.
5. Fill in all the **Our Customer** record details.
6. Click on the **Save** button.





View Record (Our Customer)

1. Click on the **App Launcher** on the left side of the screen.
2. Search for **Urban Color** and click on it.
3. Click on the **Our Customer** tab.
4. Click on any **record name** to view the details of the **Our Customer**.

The screenshot shows the 'Information' form for a customer record. The form has a header 'Information' (highlighted with a red box and the number 1). Below the header, there are several input fields: 'Customer Name' (highlighted with a red box), 'Owner' (with a profile icon and the name 'Hazari Ajay Kumar'), 'Customer id', '* Phone', and 'Email id'. At the bottom, there are three buttons: 'Cancel', 'Save & New', and 'Save' (highlighted with a red box and the number 2). The 'Save' button is a blue button with white text.

Urban Color **Our Customers** Consultants Retailers others

Our Customers **Recently Viewed** New Import Change Owner

2 items • Updated a few seconds ago Search this list...

	Customer Name	
1	Suresh	
2	Kamal	

Our Customer **Suresh**

Related **Details**

Customer Name	Suresh	Owner	Hazari Ajay Kumar
Customer id	5		
Phone	97583873728		
Email id	suresh@gmail.com		
Address	Hyderbad		
Additional Information	Customer		

Delete Record (Our Customer)

1. Click on the **App Launcher** on the left side of the screen.
2. Search for **Urban Color** and click on it.
3. Click on the **Our Customer** tab.
4. Click on the **Arrow** on the right-hand side of the particular record.
5. Click **Delete**, and then confirm by clicking **Delete** again.

Urban Color **Our Customers** Consultants Retailers others

Our Customers Recently Viewed 2 items • Updated 2 minutes ago

Search this list...

	<input type="checkbox"/> Customer Name	
1	<input type="checkbox"/> Suresh	
2	<input type="checkbox"/> Kamal	

1

2

3

Edit
Delete
Change C Delete

Urban Color Our Customers Consultants Retailers others

Our Customers Recently Viewed 2 items • Updated 6 minutes ago

Search this list... X

Delete Our Customer

Are you sure you want to delete this Our Customer?

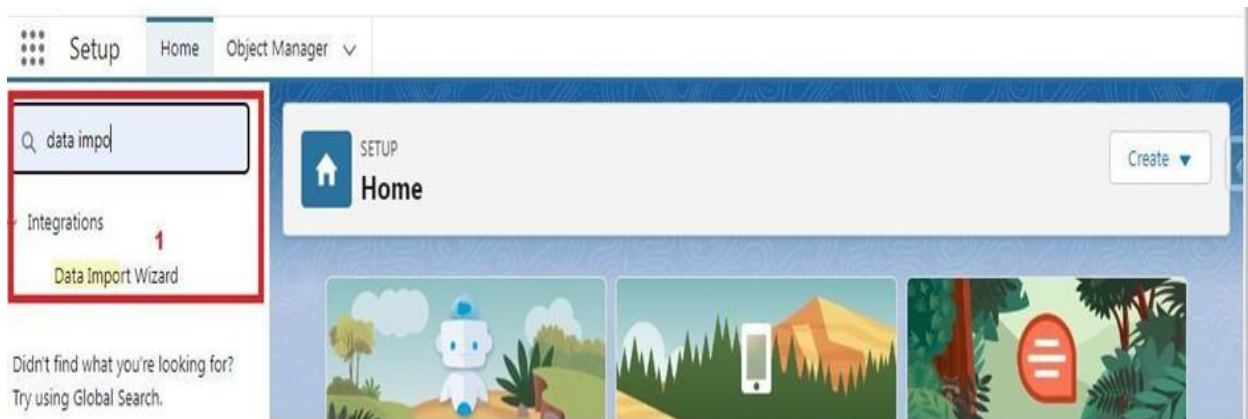
Cancel Delete

10. Import Data

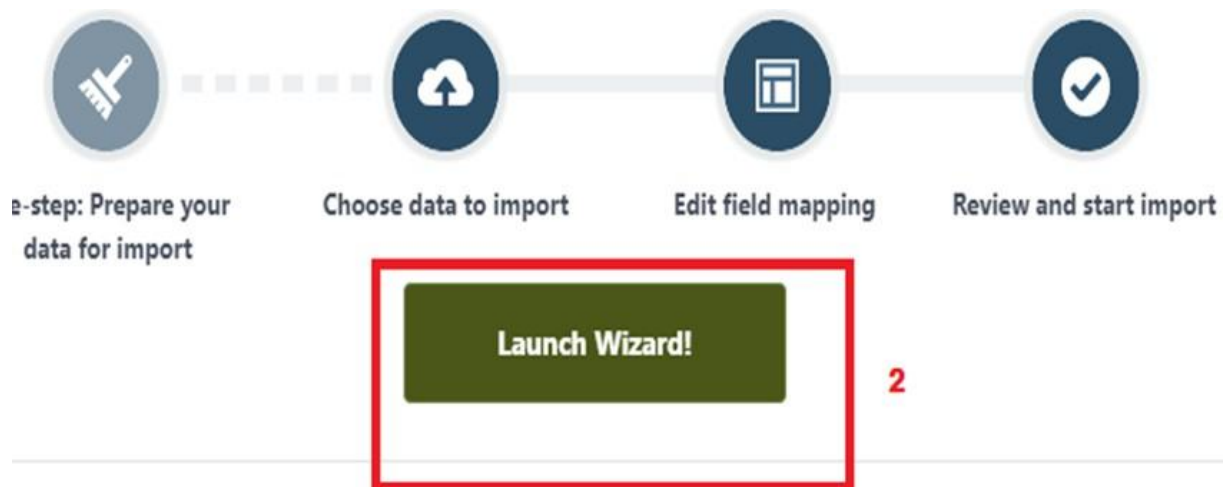
Data Import Wizard—This tool, accessible through the **Setup** menu, allows you to import data into common standard objects such as **Contacts**, **Leads**, **Accounts**, as well as data into custom objects.

To Import Data

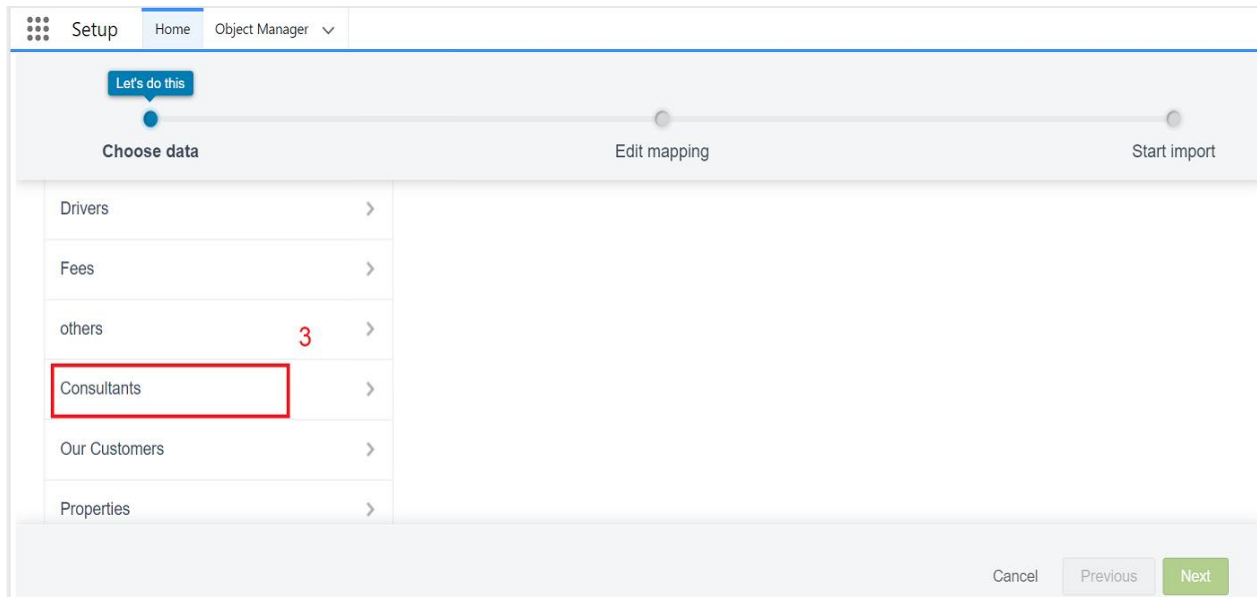
1. From **Setup**, click the **Home** tab.
2. In the **Quick Find** box, enter **Data Import** and select **Data Import Wizard**.



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.

What kind of data are you importing? ?

Standard objects	Custom objects
Attendees >	
Buyers >	

What do you want to do? ?

Add new records 4 >
Update existing records >
Add new and update existing records >

Where is your data located? ?

6. Click **CSV** and choose the file **Consultant_CSV** which was created earlier. Click **Next**.

Choose data Edit mapping Start import

What kind of data are you importing? What do you want to do? Where is your data located?

Standard objects Custom objects

Attendees >

Buyers >

Customers >

Departments ✓

Add new records ✓

Match by:
 --None--

Which User field in your file designates record owners?
 --None--

Trigger workflow rules and processes?
 ☐ Trigger workflow rules and processes for new and updated records

Drag CSV file here to upload

CSV

5

Cancel Previous **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 [Help for this page](#)

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.

Help for this page

Your selections:

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

Your import will include:

Mapped fields

7

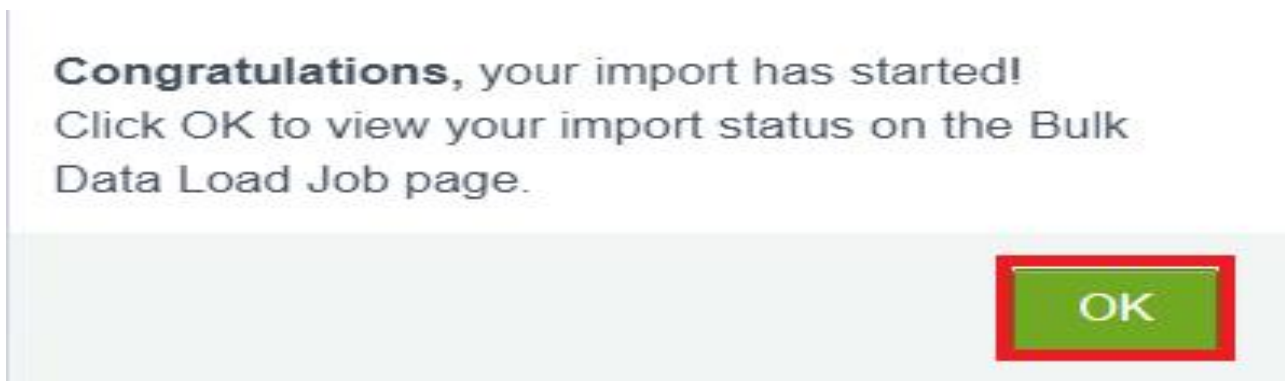
Your import will not include:

Unmapped fields

0

Cancel Previous Start Import

9. Click **OK** on the popup.



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	7512w00000Xqrar	6/19/2023, 11:05 PM	6/19/2023, 11:05 PM	103	52	0	9	0	0		Completed

11. Make sure you have **0 records** under the **Records Failed** column.

Note: Perform **Field Mapping** carefully.

Here is the formatted text for your document:

11. What are Reports?

Reports

Reports in Salesforce are lists of records that meet specific criteria, providing answers to particular questions. These records are displayed in a table format that can be filtered or grouped based on any field.

There are 4 types of report formats in Salesforce:

1. Tabular Reports:

- The most basic report format, displaying rows of records in a table with a grand total.
- Easy to set up but cannot be used to create groups of data or charts and cannot be used in Dashboards.
- Primarily used to generate simple lists or lists with a grand total.

2. Summary Reports:

- The most commonly used report format, allowing the grouping of rows of data, viewing subtotals, and creating charts.

3. Matrix Reports:

- The most complex report format, summarizing information in a grid format.
- Allows records to be grouped by both columns and rows.
- Can be used to generate dashboards and add charts.

4. Joined Reports:

- Allows the creation of different views of data from multiple report types.
- Data in joined reports is organized in blocks, each acting as a subreport with its own fields, columns, sorting, and filtering.
- Used to group and show data from multiple report types in different views.

Report Types:

A **Report Type** determines which set of records will be available in a report. Each report is based on a particular report type, selected first when creating a report. Every report type has a primary object and one or more related objects, all of which must be linked together directly or indirectly.

- A report type cannot include more than 4 objects.
- Once a report is created, its report type cannot be changed.

There are 2 types of report types:

1. **Standard Report Types:**

- Automatically included with standard objects and custom objects where "Allow Reports" is checked.
- Cannot be customized and automatically include standard and custom fields for each object within the report type.
- Created when an object or a relationship is created.
- **Note:** Standard report types always have inner joins.

2. **Custom Report Types:**

- Created by an administrator or user with "Manage Custom Report Types" permission when standard report types cannot specify which records will be available in reports.
- Allows specification of objects that will be available in a particular report.
- The primary object must have a relationship with other objects present in the report type, either directly or indirectly.

There are 3 types of access levels for folders:

1. **Viewer:**

- Users can see the data in a report but cannot make any changes except cloning it into a new report.

2. **Editor:**

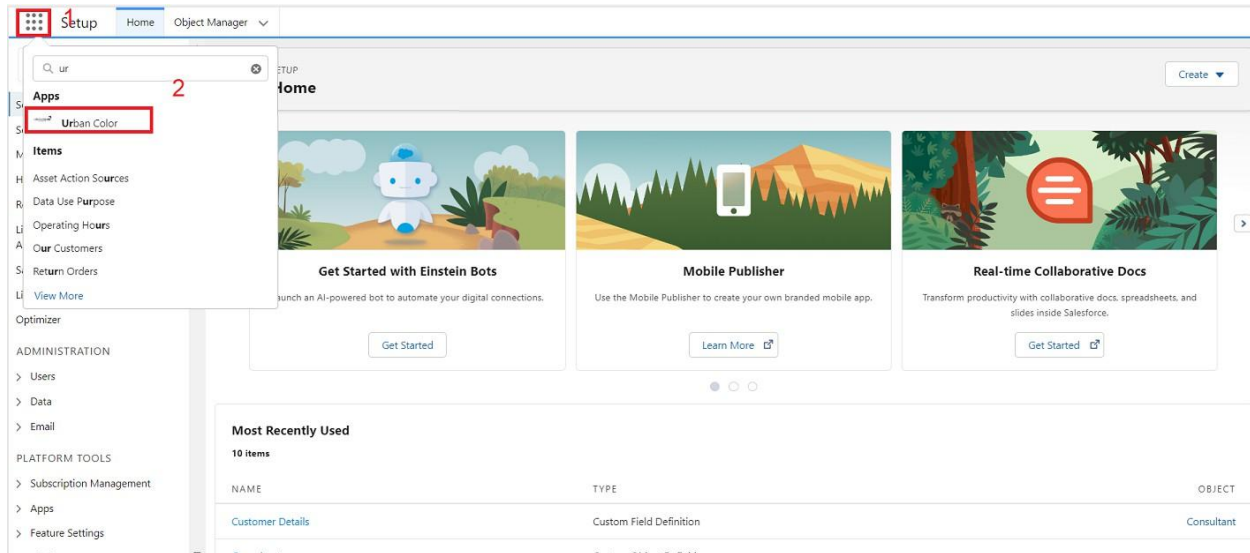
- Users can view and modify the reports and move them to/from any other folders they have access to as Editor or Manager.

3. **Manager:**

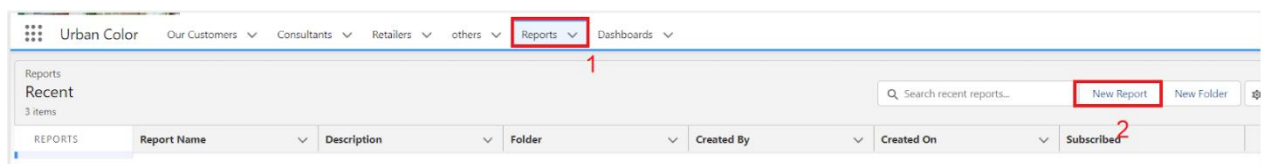
- Users can do everything Viewers and Editors can do, plus control other users' access levels to the folder.
- Managers can also delete the report.

11.1. **Create Report**

1. Click **App Launcher**.
2. Select **Urban Color App**.
3. Click the **Reports** tab.

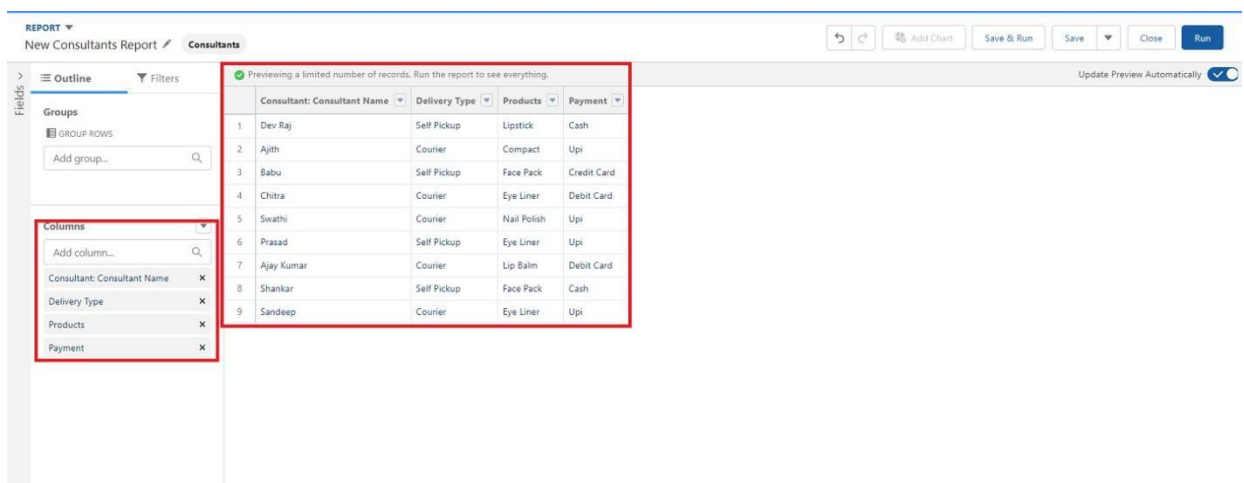


4. Click **New Report**.



5. Select the report type as **Consultants** and click **Start Report**.

6. Customize your report by selecting the following columns: **Consultant Name**, **Delivery Type**, **Products**, **Payment**.



7. Click the drop-down option on the **Payment** column and select **Bucket This Column**.

REPORT ▼
New Consultants Report Consultants

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

Fields

Outline Filters

Groups

GROUP ROWS

Add group...

Columns

Add column...

Consultant: Consultant Name x

Delivery Type x

Products x

Payment x

	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

1

2

Sort Ascending

Sort Descending

Group Rows by This Field

Group Columns by This Field

Bucket This Column

Show Unique Count

Move Left

Move Right

Remove Column

8. Name the bucket **Payment Type**.

Edit Bucket Column

* Field

Payment

* Bucket Name

Payment type

All Values (4)

Search Values

Unbucketed Values (4)

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

☐ Bucket remaining values as Other

Add Bucket

Move To ▼

Cancel

Apply

9. Click **Add Bucket** and name it **NetBanking**.

10. Click **Add Bucket** and name it **Cash**.

Edit Bucket Column

* Field

Payment ×

* Bucket Name

Payment type

All Values (4)

Bucket Name

Unbucketed Values (4)

☐ Bucket remaining values as Other

Add Bucket

Move To ▼

Search Values

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

Cancel

Apply

- Click on **All Values**, select **Credit Card**, **Debit Card**, **UPI**, and move them to **NetBanking**.

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

Move To ▼

Search Values

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

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 checked="" type="checkbox"/> Upi	
<input type="checkbox"/> Cash	

☐ Bucket remaining values as Other

Add Bucket

Move To

Cancel

Apply

12. Click on **All Values** again, select **Cash**, and move it to **Cash**.
13. Click **Apply**.
14. In **Group Rows**, add the **Payment Type Bucket** field.

REPORT

New Consultants Report

Consultants

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

Payment type	Consultant: Consultant Name	Delivery Type	Products	Payment
Net Banking (7)	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	Cash
	Shankar	Self Pickup	Face Pack	Cash
Subtotal				
Total (9)				

15. Click **Refresh**.
16. Click **Save and Run**.
17. Give the report a name, e.g., **Consultant Report**.

REPORT ▾
New Consultants Report **Consultants**

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

Payment type	Consultant: Consultant Name	Delivery Type	Products	Payment
Net Banking (7)	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	Cash
	Shankar	Self Pickup	Face Pack	Cash
Subtotal				
Total (9)				

18. Click **Save**.

Save Report

*Report Name 1
Consultants Report

Report Unique Name ⓘ
Consultants_Report_hvb

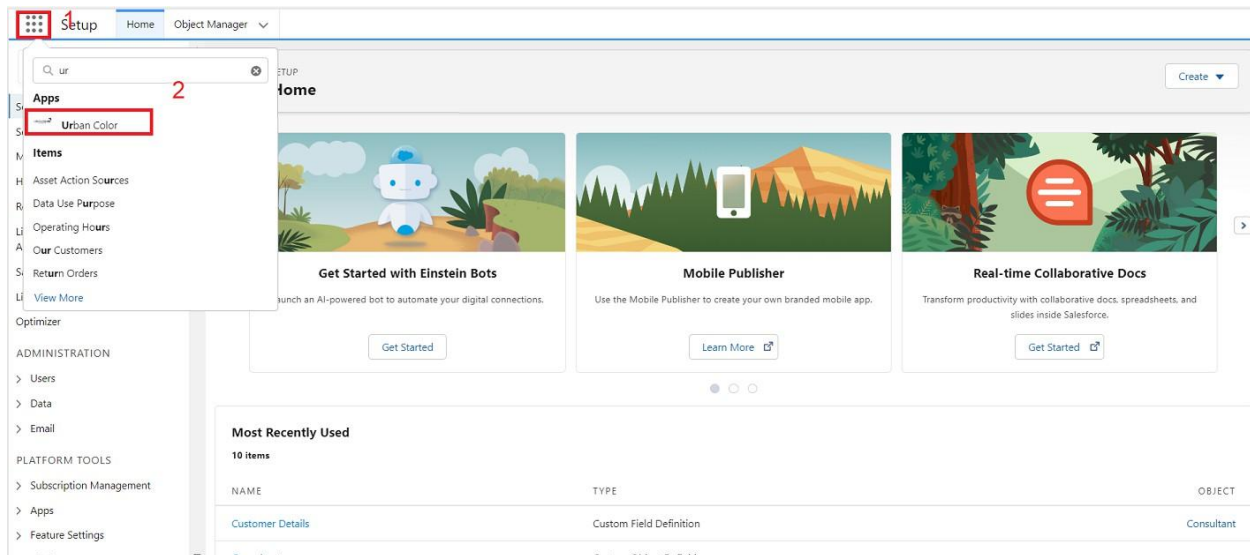
Report Description

Folder 2
Private Reports Select Folder

Cancel 3 **Save**

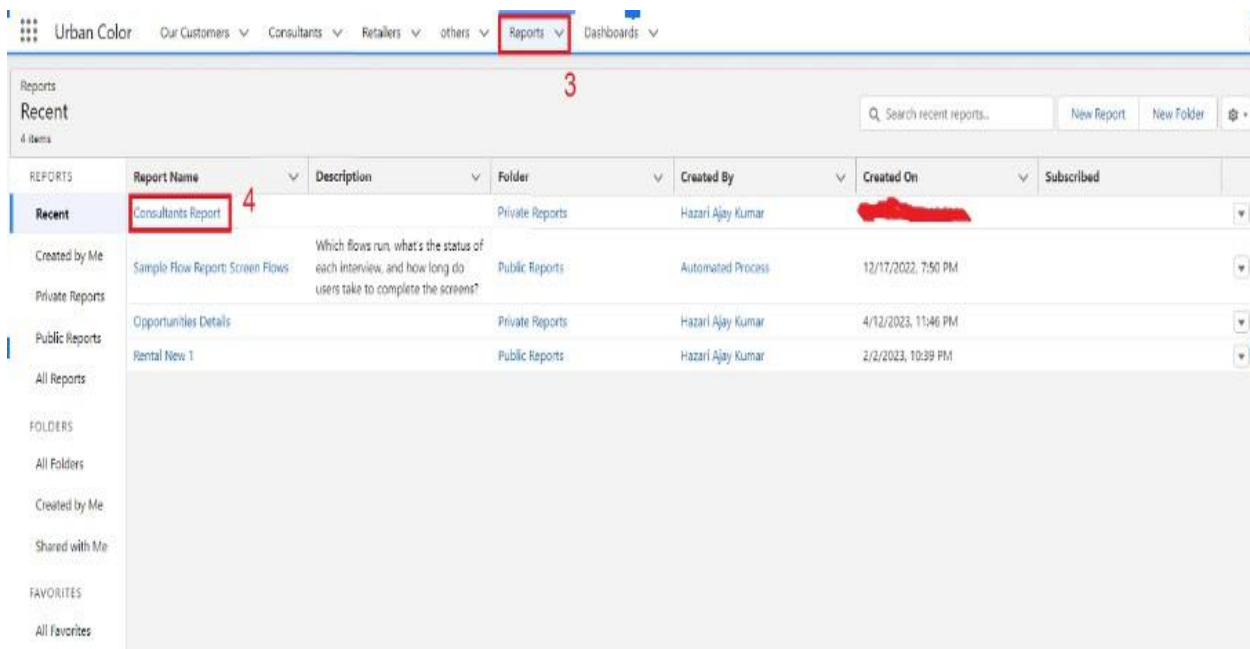
11.2. View Report

1. Click on the **App Launcher** on the left side of the screen.
2. Search for **Urban Color App** and click on it.



3. Click the **Reports** tab.

4. Click on the **Urban Color Report** to view the records.



12. Dashboards

Dashboards let you curate data from reports using charts, tables, and metrics. If your colleagues need more information, then they're able to view your dashboard's data supplying reports. Dashboard filters make it easy for users to apply different data perspectives to a single dashboard.

12.1. Create Dashboard

Here's a step-by-step guide to creating a dashboard in the Urban Color application:

- 1.
2. **Open the Urban Color Application:** Launch the application and navigate to the Dashboards tab.
3. **Create a New Dashboard:**
 - Click on the "New Dashboard" button.
4. **Name Your Dashboard:**
 - Enter "Consultant Dashboard" in the name field.
 - Click "Create."

New Dashboard

* Name 3

Consultant Dashboard

Description

Folder

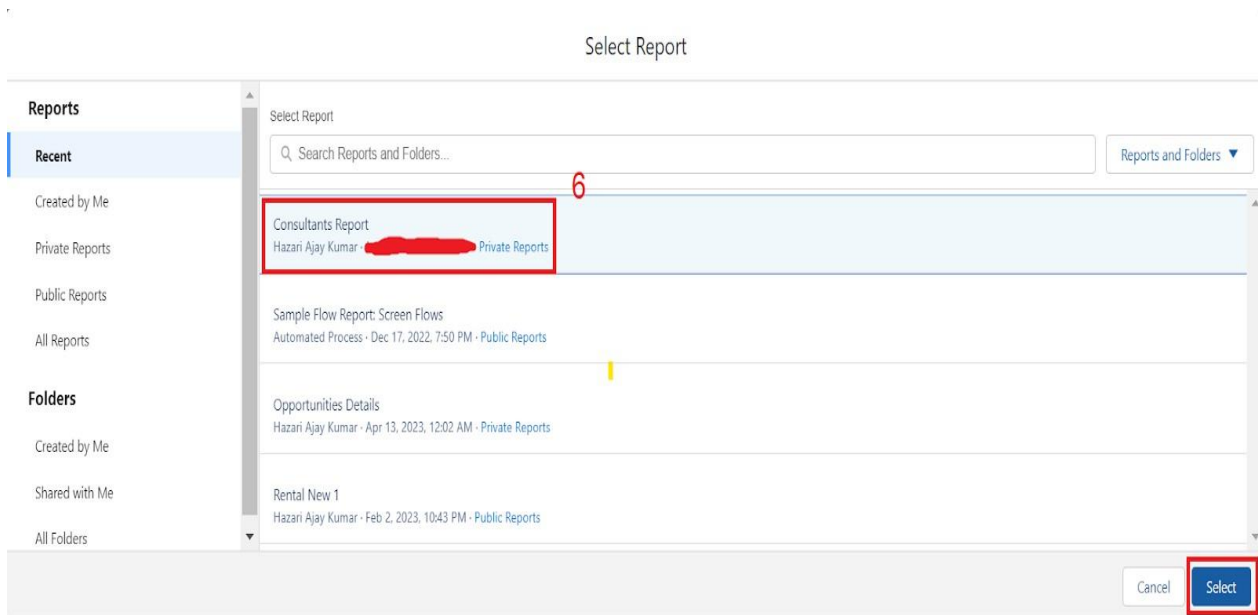
Private Dashboards

Select Folder

Cancel

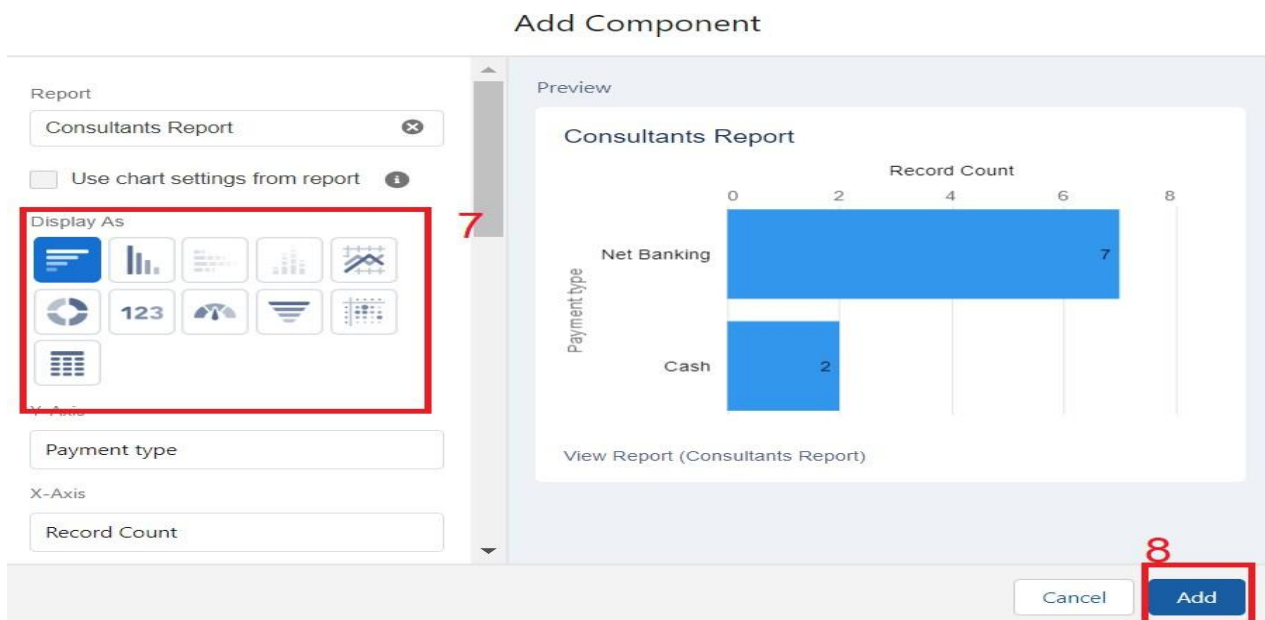
Create 4

5. **Add Components to the Dashboard:**
 - Click on "+ Component" to add a new component.
 - Select the "Consultants Report" you created earlier.



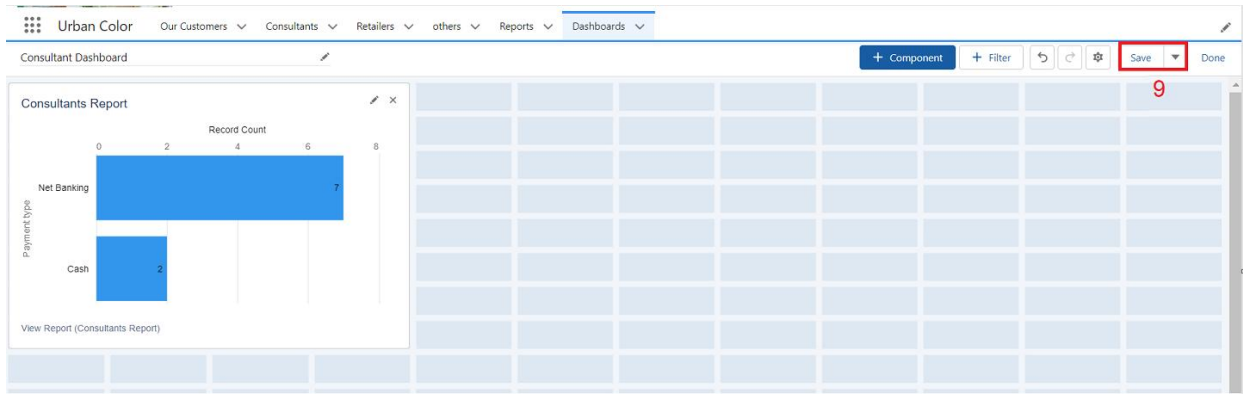
6. Choose Data Visualization:

- Pick a visualization type (e.g., chart, table) that best suits your data and needs.
- Click "Add."



7. Save Your Dashboard:

- After configuring the components and visualizations, click "Save" to finalize your dashboard.



12.2. View Dashboard

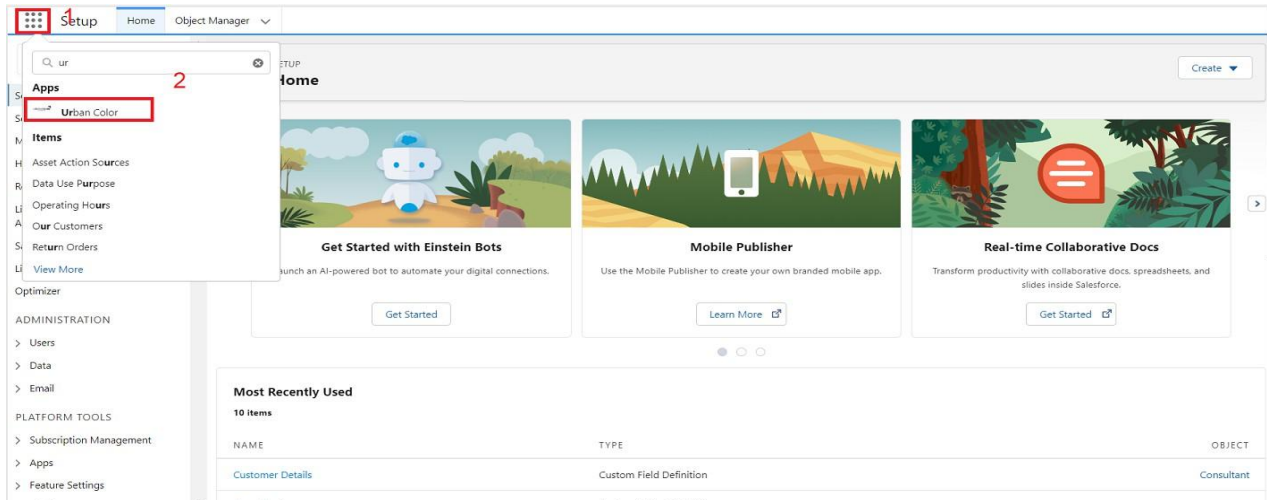
To view the dashboard, follow these steps:

1. Open the App Launcher:

- Click on the App Launcher icon on the left side of the screen.

2. Search for the Dashboard:

- Type "Candidate Internal Result Card" into the search bar.
- Click on the "Candidate Internal Result Card" option that appears.



3. Navigate to the Dashboard Tab:

- Once in the Candidate Internal Result Card view, click on the "Dashboard" tab.

4. View the Graph:

- Click on the "Candidate Internal Result Card" to see the graph view of the records.

3

Dashboards

Recent

3 items

Search recent dashboards...

New Dashboard

New Folder



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						
FOLDERS						