

PROJECT NAME

Cosmetics Store Management

BY

Karka Arun Kumar

karakaarunkumar85@gmail.com

Abstract

This project focuses on the creation of a Cosmetics Store Management system utilizing Salesforce to enhance operational efficiency and customer engagement. The proposed solution integrates essential functionalities such as sales management, inventory tracking, customer relationship management (CRM), and marketing automation. By harnessing Salesforce's capabilities, the project aims to streamline the sales process, optimize inventory levels, and personalize customer interactions based on purchasing behaviors and preferences. Additionally, robust reporting and analytics tools will be implemented to provide insights into sales performance and market trends, facilitating informed decision-making. The project includes a structured implementation plan involving requirements gathering, system configuration, data migration, and comprehensive user training to ensure effective adoption. Ultimately, this initiative aspires to improve operational workflows, boost sales, and elevate customer satisfaction in the cosmetics retail environment.

Cosmetics Store Management

Description :

Cosmetics Store Management in Salesforce is a solution that helps cosmetics stores manage their operations efficiently and effectively. The solution is built on the Salesforce platform, which provides a powerful and scalable platform for managing customer

relationships, sales, and inventory. cosmetics stores improve their operational efficiency, enhance customer engagement, and drive growth.

Summary :

1. Key Features:Customer Management:

- **Contacts & Accounts:** Efficiently manage customer details, including contact information, purchase history, and preferences.
- **Customer Segmentation:** Segment customers based on various criteria such as purchase frequency, product preference, and location for targeted marketing.

2. Product Management:

- **Product Catalog:** Maintain an up-to-date catalog of cosmetic products with detailed descriptions, pricing, and availability.
- **Inventory Tracking:** Monitor stock levels, set reorder points, and track inventory turnover to ensure optimal stock levels.

3. Sales Management:

- **Order Processing:** Automate the order management process, including order creation, status tracking, and invoicing.
- **Sales Analytics:** Generate reports and dashboards to analyze sales trends, identify top-selling products, and forecast future sales.

4. Marketing & Promotions:

- **Campaign Management:** Create and manage marketing campaigns, including email promotions, discounts, and special offers.
- **Customer Engagement:** Use Salesforce tools to engage with customers through personalized offers and targeted marketing.

5. Customer Service:

- **Case Management:** Track and resolve customer service issues and complaints efficiently.
- **Knowledge Base:** Provide customers with access to a self-service portal for FAQs, product information, and troubleshooting.

6. Integration & Automation:

- **Salesforce Integration:** Integrate with other systems such as ERP or e-commerce platforms to ensure seamless data flow.

- **Workflow Automation:** Automate repetitive tasks and processes to increase operational efficiency and reduce manual errors

TASKS :

1.Creating the Objects :

To Create an object:

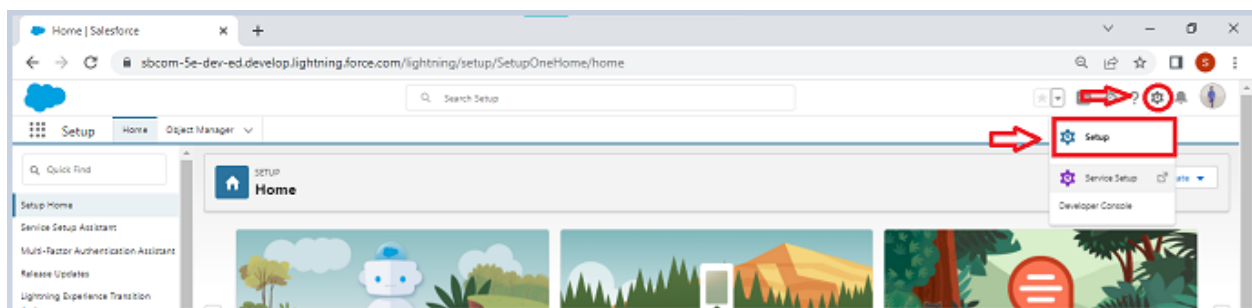
Creation of Objects for Urban Color, For this Urban Color we need to create 3 objects i.e .,Our Customers,Consultants,Retailers,others.

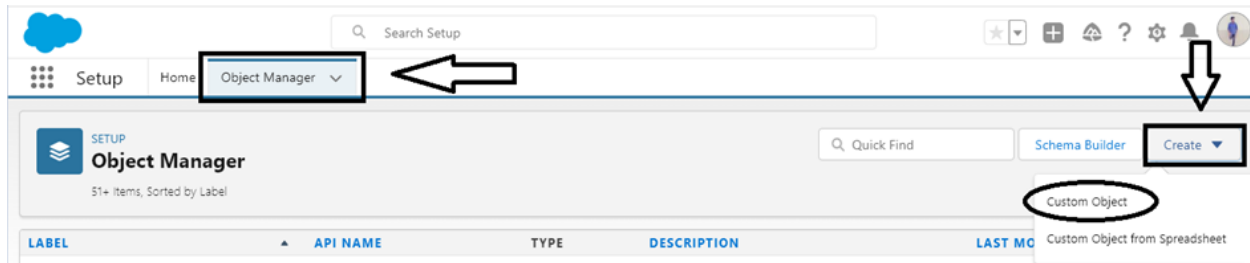
The below steps will assist you in creating those objects.

- 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

On the Custom Object Definition page, create the object as follows:

- Label: Our Customer
- Plural Label: Our Customers
- Record Name: Our Customer
- Check the Allow Reports checkbox
- Check the Allow Search checkbox
- Click Save.
- Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs.
- Under Custom Object Tabs, click New.
- For Object, select Our Customer.
- For Tab Style, select any icon.
- Leave all defaults as is. Click Next, Next, and Save.





We need to create 4 objects named Our customer,Consultant,Retailer,Others.

For creating the another 3 objects,we need t follow the same procedure as mentioned above.

After the completion of object creation task,We'll move on to further steps.

Task2 : Creating Fields and Relationship :

- 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 :

Fields in Our Customers objects follow below data types:

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 Consultants objects

Fields in Consultants objects follow below data types:

	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

Fields in Retailers objects follow below data types:

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

Fields in Others objects

Fields in Others objects follow below data types:

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.

1. **Task 3: Page Layout creation :**

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.

SETUP > OBJECT MANAGER
Consultant

Details
Fields & Relationships
Page Layouts 1
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters

Page Layouts
1 Items, Sorted by Page Layout Name

Quick Find New Page Layout Assignment

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Consultant Layout	Hazari Ajay Kumar, 4/1/2023, 7:25 AM	Hazari Ajay Kumar, 6/18/2023, 10:30 PM

2

thesmartbridgecom2-dev-ed.develop.lightning.force.com/lightning/.../view

4. Click And Drag Delivery type and Address Fields Below 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
Blank Space

Field Name	Created By	Owner	Products
Customer id	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
Blank Space

Field Name	Created By	Owner	Products
Customer id	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

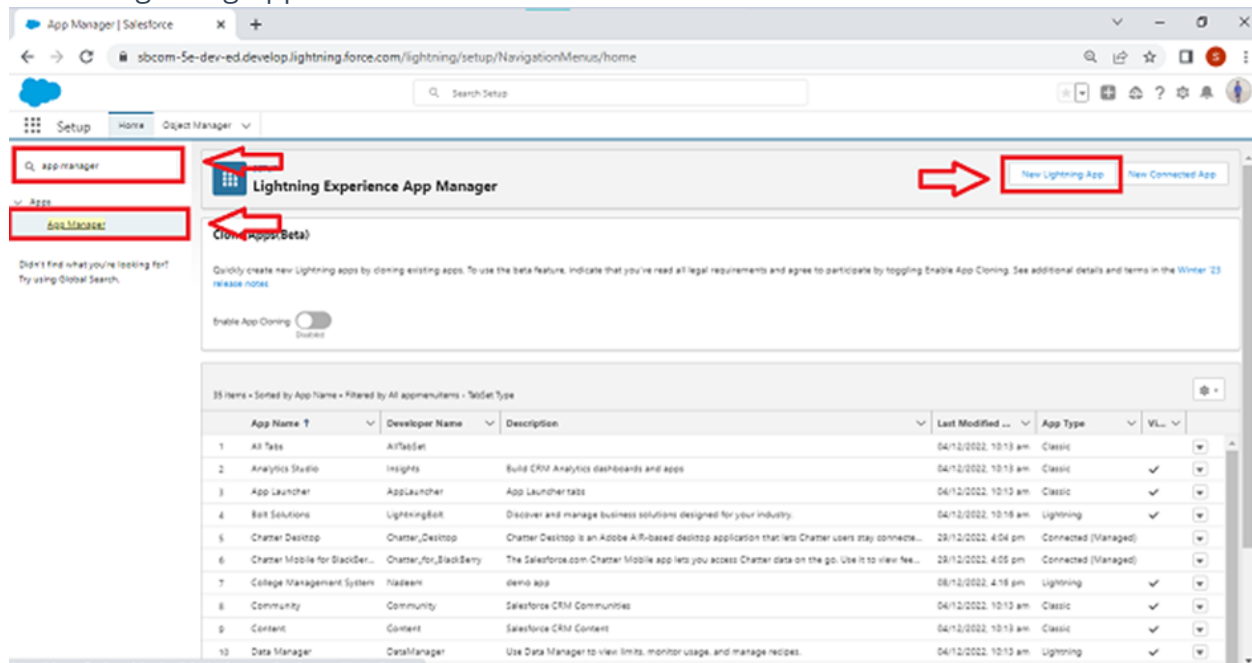
Payment Sample Text

- 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 the 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 to specific profiles or record types. Finally, preview and test the layout to ensure it is functional and meets user requirements.

► **Task 4 : Creation of a 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:

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



App Name	Developer Name	Description	Last Modified	App Type	VL
1 All Tabs	AllTabSet		04/12/2022, 10:13 am	Classic	
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	04/12/2022, 10:13 am	Classic	✓
3 App Launcher	AppLauncher	App Launcher tabs	04/12/2022, 10:13 am	Classic	✓
4 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	04/12/2022, 10:16 am	Lightning	✓
5 Chatter Desktop	ChatterDesktop	Chatter Desktop is an Adobe AIR-based desktop application that lets Chatter users stay connecte...	23/12/2022, 4:04 pm	Connected (Managed)	
6 Chatter Mobile for BlackBer...	ChatterforBlackBerry	The Salesforce.com Chatter Mobile app lets you access Chatter data on the go. Use it to view fee...	23/12/2022, 4:05 pm	Connected (Managed)	
7 College Management System	Nadeem	demo app	08/12/2022, 4:18 pm	Lightning	✓
8 Community	Community	Salesforce CRM Communities	04/12/2022, 10:13 am	Classic	✓
9 Content	Content	Salesforce CRM Content	04/12/2022, 10:13 am	Classic	✓
10 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	04/12/2022, 10:13 am	Lightning	✓

2.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.

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 ⓘ
#0070D2

Org Theme Options
☐ Use the app's image and color instead of the org's custom theme

App Launcher Preview

Next

3.To Add Navigation Items

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

4.Select the items (Our Customers,Consultants,Retailers,Others,Reports,Dashboards) from the search bar and move it using the arrow button --> Next.

5.To Add User Profiles:

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

6. Search profiles (System administrator) in the search bar --> click on the arrow button --> 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.

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

Creating a Profiles:

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

- From Setup enter Profiles in the Quick Find box, and select Profiles.
- From the list of profiles, find Standard User.
- Click Clone.
- For Profile Name, enter Store Supervisor.
- Click Save.
- While still on the Store Supervisor profile page, then click Edit.
- Scroll down to Custom Object Permissions and give access for Create, Read, Edit, Delete, View all and modify all for Our Customers, Consultants, Retailers, Others.
- Scroll down to Custom App Settings and give access for Urban Color.

To create a new profile:

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

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 Custom Profile ✓
Description	

Setup Home Object Manager

Q prof

Users

Profiles

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

Profiles

Profile	Standard	Custom	Profile	Standard	Custom
(standard__LightningSort)			(standard__Unatter)		
Community (standard__Community)	✓		Salesforce Scheduler Setup (standard__LightningScheduler)		
Content (standard__Content)	✓		Sample Console (standard__ServiceConsole)		
Data Manager (standard__DataManager)	✓		Service (standard__Service)	✓	
Digital Experiences (standard__SalesforceCMS)	✓		Service Console (standard__LightningService)	✓	
Lightning Usage App (standard__LightningInstrumentation)	✓		Site.com (standard__Sites)	✓	
LWC LEARNINGS (LWC_LEARNINGS)			Subscription Management (standard__RevenueCloudConsole)	✓	
Marketing (standard__Marketing)	✓		Urban Color (Urban_Color)	✓	●
Queue Management (standard__QueueManagement)	✓		Vehicle Management (Vehicle_Management)		
Rental Management (Rental_Management)			WDC (standard__Work)	✓	

Service Provider Access

Tab Settings

☐ Overwrite users' personal tab customizations

3. Click on Save.

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

Setup Home Object Manager

Q profi

Users

Profiles

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

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from. ⓘ Required Information

Existing Profile Standard Platform User

User License Salesforce Platform

Profile Name Billing Operator

Save Cancel

Profiles

Allow OAuth 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

5. Click On Save

Task 6: Setting up Roles :

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

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

Role Edit

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

Role Edit

New Role

Role Edit

Label Billing Operator

Role Name Billing_Operator

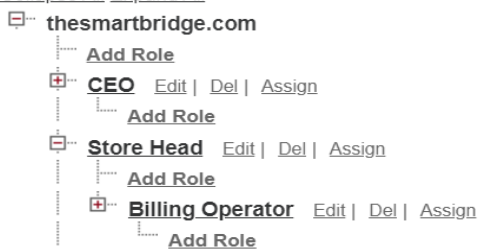
This role reports to Store Head

Role Name as displayed on reports

Save Save & New Cancel

Your Organization's Role Hierarchy

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



- In Salesforce, roles define the hierarchy and access levels for users within an organization. Roles determine the visibility of records and data sharing based on an employee's position and responsibilities. By establishing a role hierarchy, Salesforce allows users to access and manage records owned by users in roles below them in the hierarchy. This ensures that managers can oversee the work of their subordinates while maintaining data security and privacy. Roles are crucial for configuring access controls, enabling effective data sharing, and facilitating proper reporting within Salesforce.

► **Task 7 : Creation of an User :**

- In Salesforce, a user represents an individual who has access to the Salesforce platform and its functionalities. Each user is assigned a unique username, and their access level and permissions are defined by their profile and role within the organization. Users can perform tasks such as managing records, running reports, and collaborating with team members based on their assigned permissions. Salesforce administrators configure user settings, including login credentials, security settings, and access to various features and data, ensuring that users can efficiently and securely perform their job functions.
1. From Setup, in the Quick Find box, enter Users, and then select Users.
 2. Click New User.
 3. 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.
 4. Select a Role(Store Head)
 5. Select a User Licence 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.

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

Setup Home Object Manager ▾

Q 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

Users

User Edit Save Save & New Cancel

General Information Required Information

First Name Amar

Last Name k

Alias ak

Email amark2133@gmail.com

Username amark2133@salesforce.com

Nickname User167161323313747430

Title Store Supervisor

Company

Department

Division

Role Store Head

User License Salesforce

Profile Store Supervisor

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 --None--

Setup Home Object Manager ▾

Q 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

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

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.

Steps to Create a Record:

1. **Navigate to the Object Tab:**

- Log in to Salesforce and go to the relevant object tab (e.g., Accounts, Contacts, Opportunities).
- 2. **Click “New”:**
 - On the object’s home page or list view, click the “New” button to initiate the creation of a new record.
- 3. **Enter Record Information:**
 - Complete the fields in the record form with the required and optional data. This may include details like names, addresses, dates, and other relevant information.
- 4. **Save the Record:**
 - Once all necessary information is entered, click “Save” to create and store the new record in Salesforce.

Steps to Modify a Record:

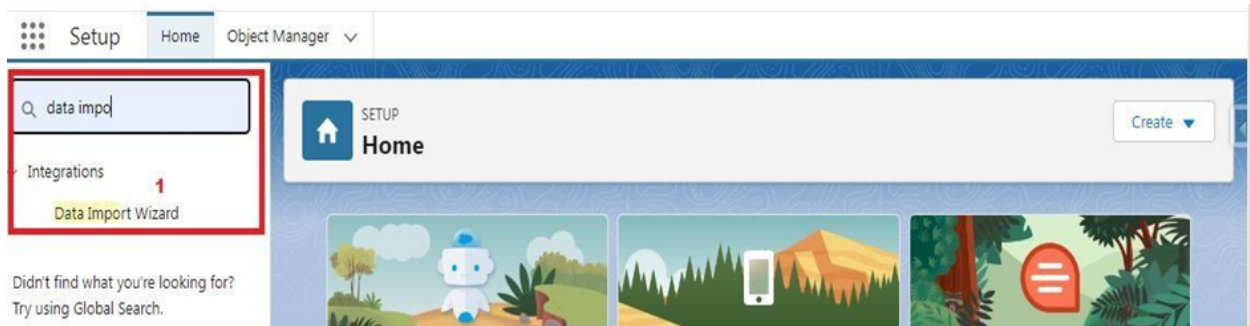
1. **Find the Record:**
 - Locate the record you want to modify by using the object’s list view, search function, or related lists.
2. **Open the Record:**
 - Click on the record’s name to open it and view its details.
3. **Click “Edit”:**
 - In the record’s detail view, click the “Edit” button to enable editing mode.
4. **Update Record Information:**
 - Make the necessary changes to the fields as required. Ensure all required fields are correctly filled out.
5. **Save the Changes:**
 - After making the updates, click “Save” to apply and store the modifications.

These steps ensure that records are properly created and updated, maintaining accurate and current data in Salesforce.

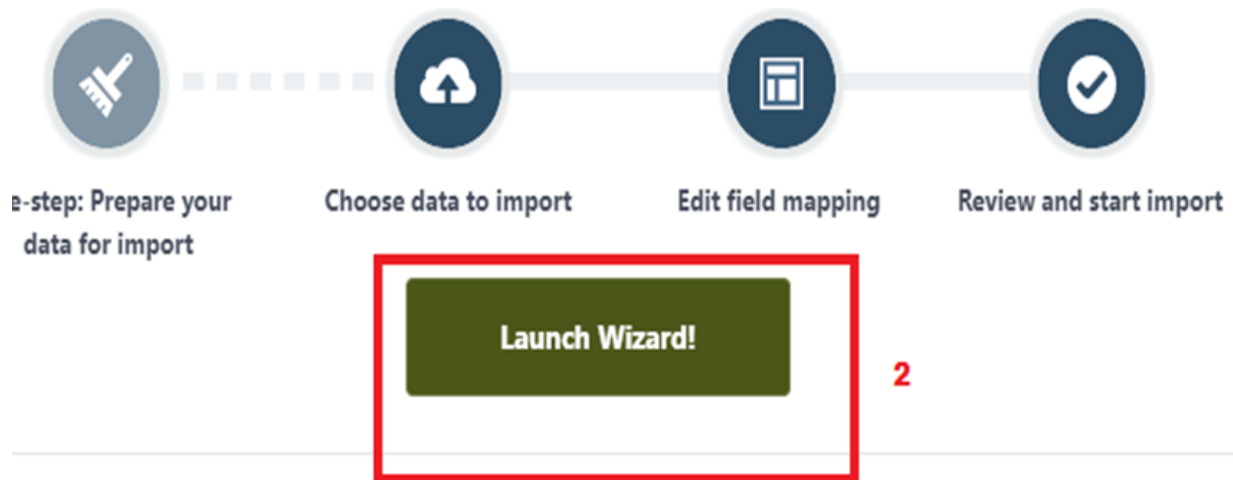
► Task 9: Importing Data :

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.

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.

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

Where is your data located? ?

Standard objects	Custom objects
Drivers	>
Fees	>
others	>
Consultants	>
Our Customers	>
Properties	>

5. Select Add new records.

6. Click CSV and choose file Consultant_CSV which we made 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

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

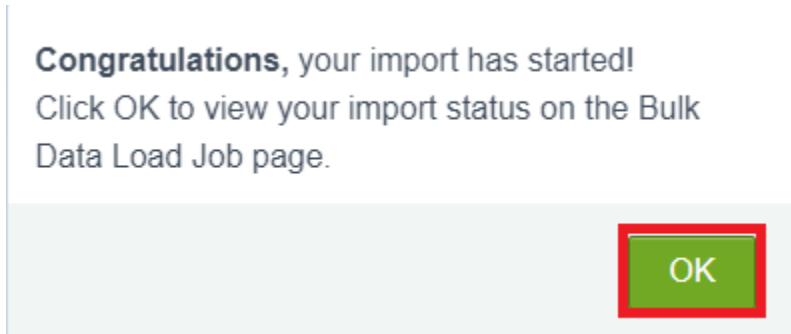
Your import will not include:

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 - Do Field mapping carefully.

Task 10 :Accessing Reports :

Creating Report :

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 displays the Salesforce Setup interface. At the top, the 'Setup' tab is selected, with a red box and the number '1' highlighting the Setup icon. Below the navigation menu, the 'Apps' section is expanded, showing a list of applications. 'Urban Color' is highlighted with a red box and the number '2'. The main content area shows three cards: 'Get Started with Einstein Bots', 'Mobile Publisher', and 'Real-time Collaborative Docs'. Below these, the 'Most Recently Used' section lists 10 items, including 'Customer Details', 'Custom Field Definition', and 'Consultant'. At the bottom, the 'Reports' section is visible, with a red box and the number '1' highlighting the 'Reports' dropdown menu. The 'Recent' reports table is shown, with columns for 'Report Name', 'Description', 'Folder', 'Created By', 'Created On', and 'Subscribed'. The 'Subscribed' column has a red box and the number '2' next to it.

REPORT

New Consultants Report

Consultants

↶

↷

Add Chart

Save & Run

Save

Close

Run

Outline

Filters

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

Update Preview Automatically

Fields

Groups

GROUP ROWS

Add group...

Columns

Add column...

Consultant: Consultant Name

Delivery Type

Products

Payment

	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

REPORT

New Consultants Report

Consultants

↶

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Save & Run

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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

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

Edit Bucket Column

* Field: Payment X

* Bucket Name: Payment type

All Values (4)

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 X

* Bucket Name: Payment type

All Values (4)

Bucket Name 2

Unbucketed Values (4)

☐ Bucket remaining values as Other 1

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 X

* Bucket Name

Payment type

All Values (4)

Net Banking (0)

Cash (0)

Unbucketed Values (4)

☐ Bucket remaining values as Other

Add Bucket

Search Values

VALUE

BUCKET

☐

Credit Card

☐

Debit Card

☐

Upi

☐

Cash

Move To

Cancel

Apply

Edit Bucket Column

* Field

Payment X

* Bucket Name

Payment type

All Values (4)

Net Banking (0)

Cash (0)

Unbucketed Values (4)

☐ Bucket remaining values as Other

Add Bucket

Search Values

VALUE

BUCKET

☒

Credit Card

☒

Debit Card

☒

Upi

☐

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



VALUE

BUCKET



Credit Card



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



VALUE

BUCKET



Credit Card

Net Banking



Debit Card

Net Banking



Upi

Net Banking



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

VALUE

BUCKET

☒ Cash

Cash

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

OutlineFilters

Groups

GROUP ROWS

Add group...

Columns

Add column...

Consultant: Consultant Name

Delivery Type

Products

Payment

Payment type

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

	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

OutlineFilters

Groups

GROUP ROWS

Add group...

Payment type

GROUP COLUMNS

Add group...

Columns

Add column...

Consultant: Consultant Name

Delivery Type

Products

Payment

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)					

Save Report

1

* Report Name

Consultants Report

Report Unique Name ⓘ

Consultants_Report_hvb

Report Description

2

Folder

Private Reports

Select Folder

3

Cancel

Save

View Reports :

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

1

Setup

Home

Object Manager

2

Apps

Urban Color

Items

Asset Action Sources

Data Use Purpose

Operating Hours

Our Customers

Return Orders

View More

Get Started with Einstein Bots

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

New Dashboard

* Name

3

Consultant Dashboard

Description

Folder

Private Dashboards

Select Folder

4

Cancel

Create

Select Report

Reports

Recent

- Created by Me
 - Private Reports
 - Public Reports
 - All Reports
- #### Folders
- Created by Me
 - Shared with Me
 - All Folders

Select Report

Q Search Reports and Folders...

Reports and Folders

6

Consultants Report
Hazari Ajay Kumar Private Reports

Sample Flow Report: Screen Flows
Automated Process - Dec 17, 2022, 7:50 PM - Public Reports

Opportunities Details
Hazari Ajay Kumar - Apr 13, 2023, 12:02 AM - Private Reports

Rental New 1
Hazari Ajay Kumar - Feb 2, 2023, 10:43 PM - Public Reports

Cancel

Select

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

Payment type

Net Banking 7

Cash 2

View Report (Consultants Report)

Cancel Add

9

View Dashboard :

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

1 Setup Home Object Manager

2

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 with Einstein Bots

Mobile Publisher

Real-time Collaborative Docs

Most Recently Used

10 Items

NAME TYPE OBJECT

Customer Details Custom Field Definition Consultant

3

Urban Color Our Customers Consultants Retailers others Reports Dashboards

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

THANK YOU