Cosmetics Store Management

Description:

This Cosmetics store management project aims to design and implement a seamless and powerful application for managing and enhancing customer experience along with organization through creation of various objects and reports that helps to organize and boost up the sales of Cosmetic stores. It includes customer data, sales records and inventory management and order tracking.This management analyze sales performance and customer behavior to improve customer engagement and retention. The Cosmetics sales management ensures record-level acess control and data-driven decision making.This solution built on Salesforce provides scalable and responsive platform for managing operations effectively and efficiently.Salesforce administration and development in the Cosmetics management streamlines business analysis and solution implementation in addition to automate cosmetics store operations using Salesforce.

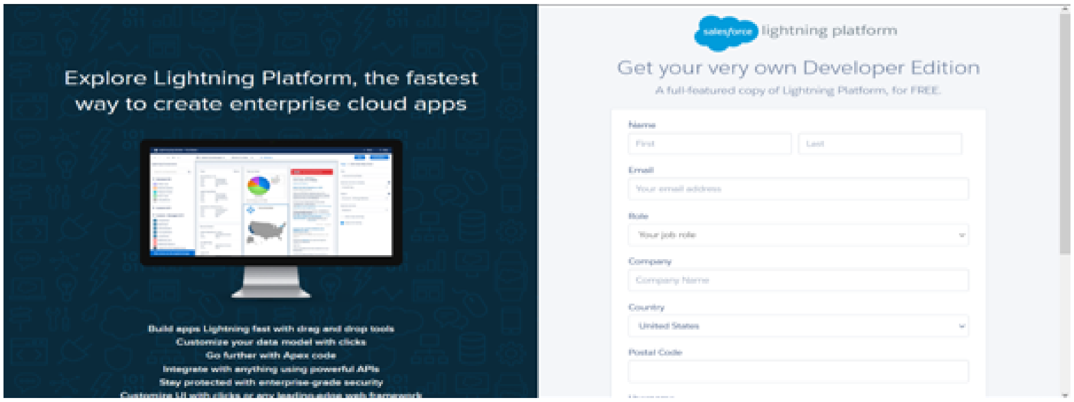
Tasks involved :

Task 1 : Creation of Salesforce Org

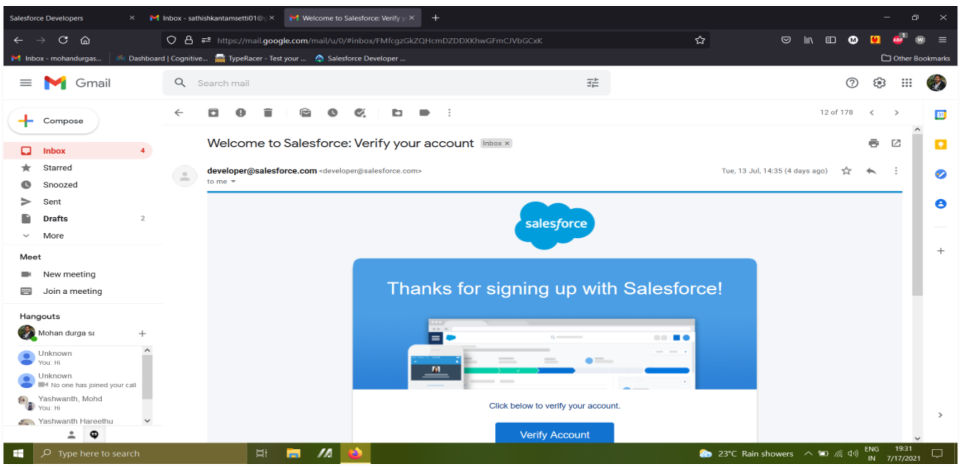
Creating a developer org in salesforce.

1. Go to developers.salesforce.com/signup.
2. Click on sign up.
3. On the sign up form, enter the following details :
1. First name & Last name
2. Email
3. Role : Developer
4. Company : College Name
5. County : India
6. Postal Code : pin code
7. Username : should be a combination of your name and company.This need not be an actual email id, you can give anything in the format : username@organization.com

8. Click on sign up after filling these.

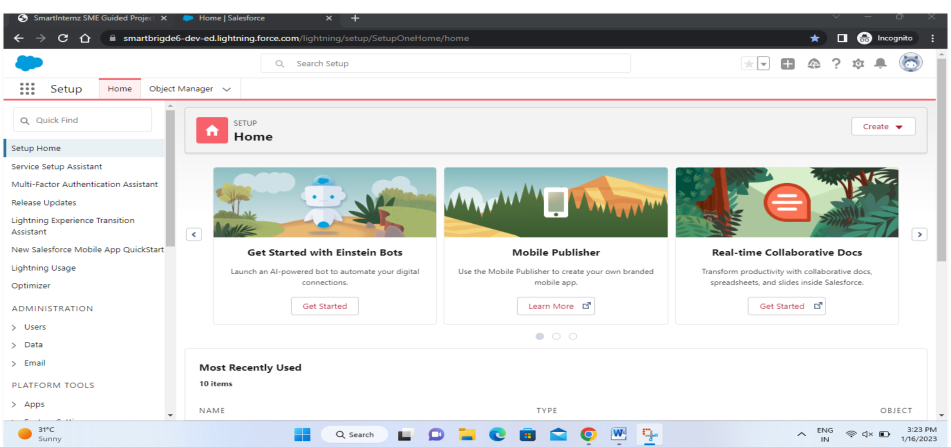


Account Activation: Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins, as



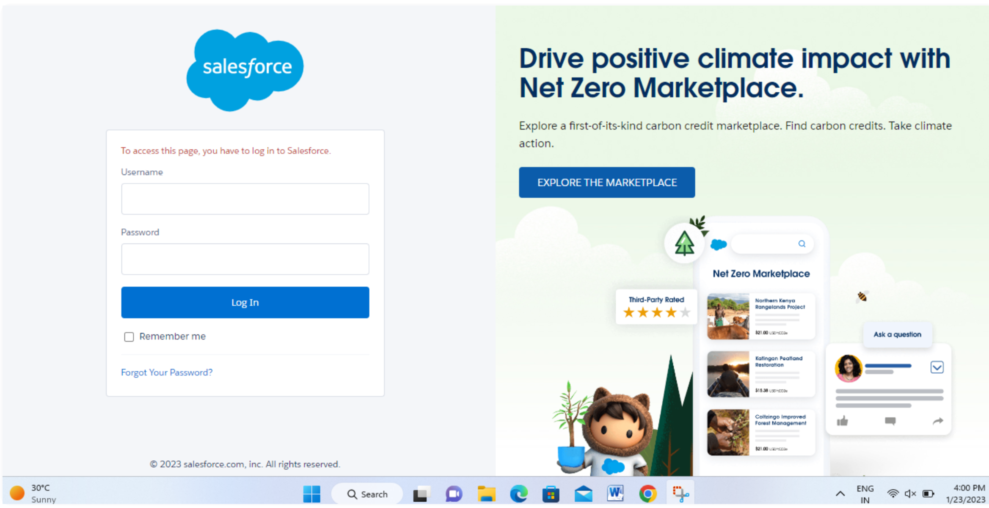
Login To Your Salesforce Account:

Go to salesforce.com and click on login.Enter the username and password that you just created.After login this is the home page which you will see.



Salesforce Login

[htttps://login.salesforce.com](https://login.salesforce.com)



Task 2 : Creation of Objects

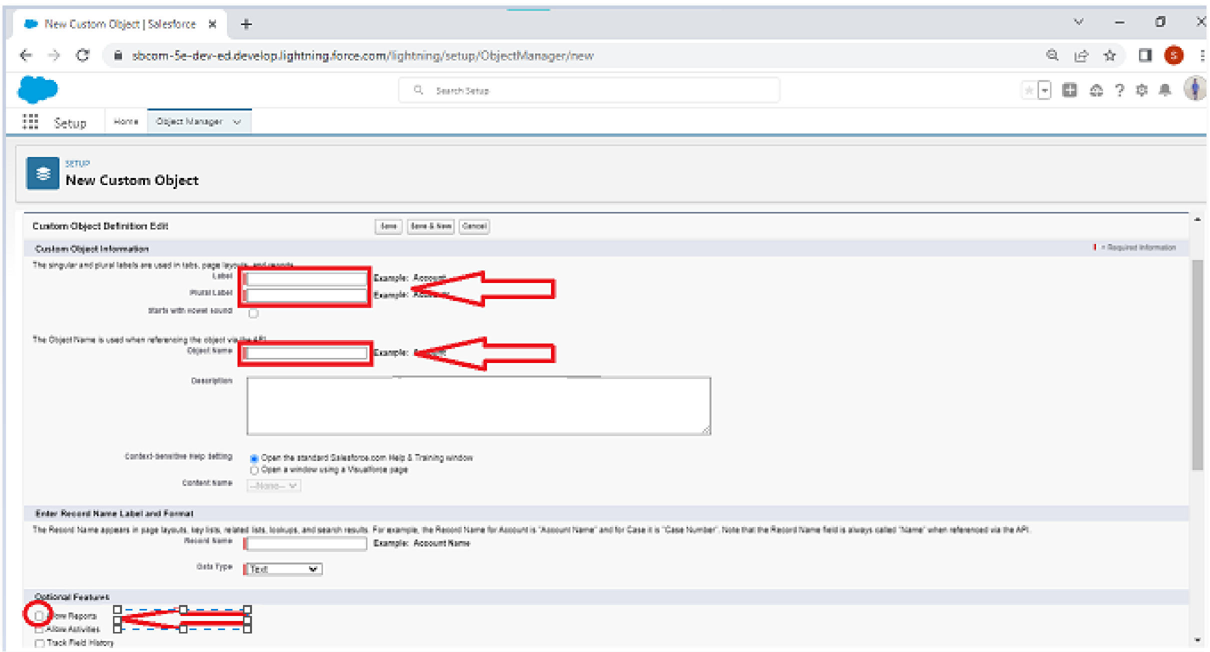
Creation of Objects for Urban Color, For this Urban Color we need to create 3 objects i.e .,Our Customers,Consultants,Retailers,others.

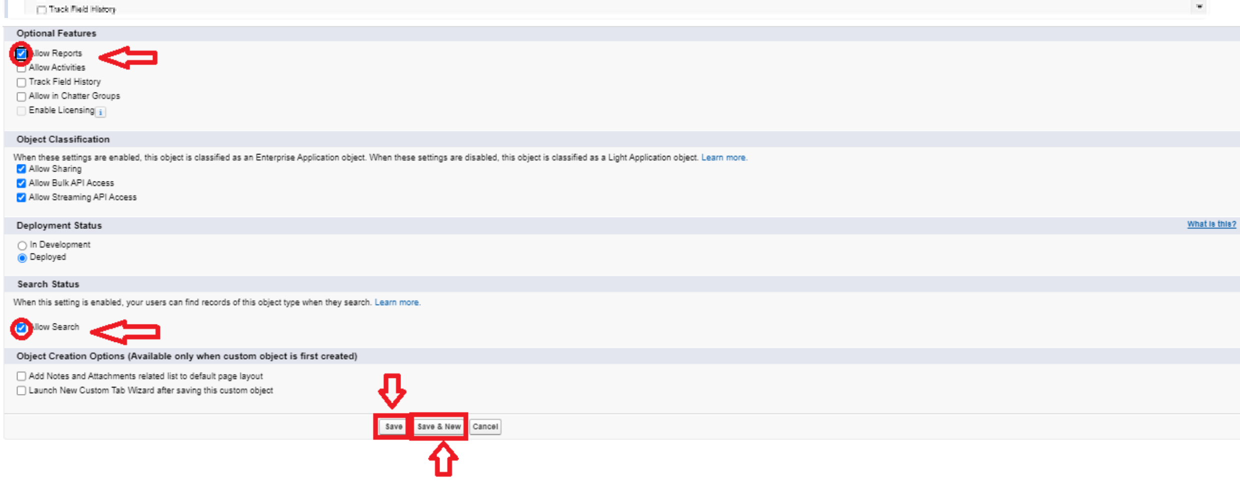
The below steps will assist you in creating those objects.

- 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.





Task 3 : Creating the Fields and Relationships

An object relationship in Salesforce is a two-way association between two objects. Relationships are created by creating custom relationship fields on an object. This is done so that when users view records, they can also see and access related data.

Fields in Our Customers objects 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 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 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 Others objects follow below data types:

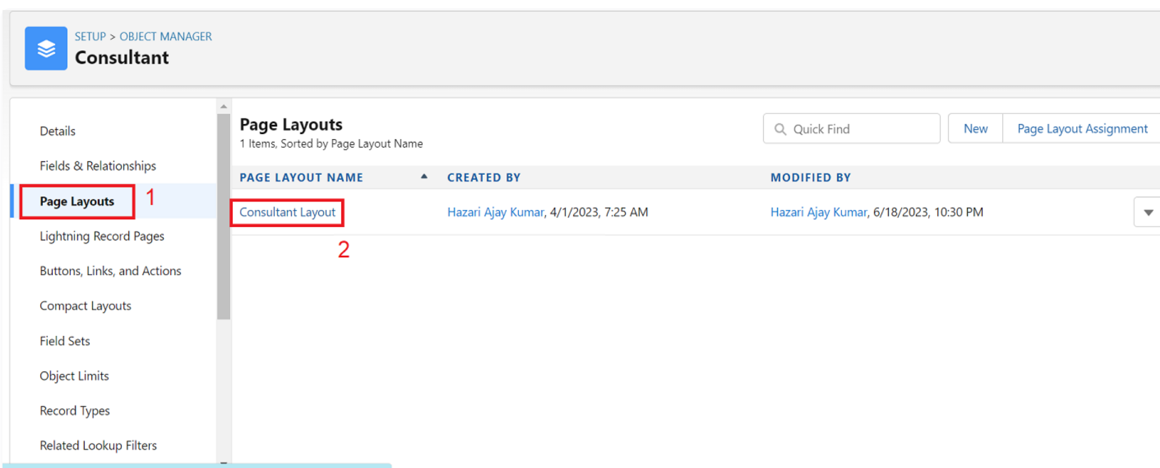
S No	Field Label	Data Type
1	Name	Text
2	Employee 1)Company Employee 2)Staff 3)Special Reference	Picklist
3	Coupon	Text
4	Products 1)Lipstick 2)Compact 3)EyeLiner 4)FacePack 5)Lip Balm 6)Nail Polish	Multi-Picklist

Fields in Retailers objects follow below data types:

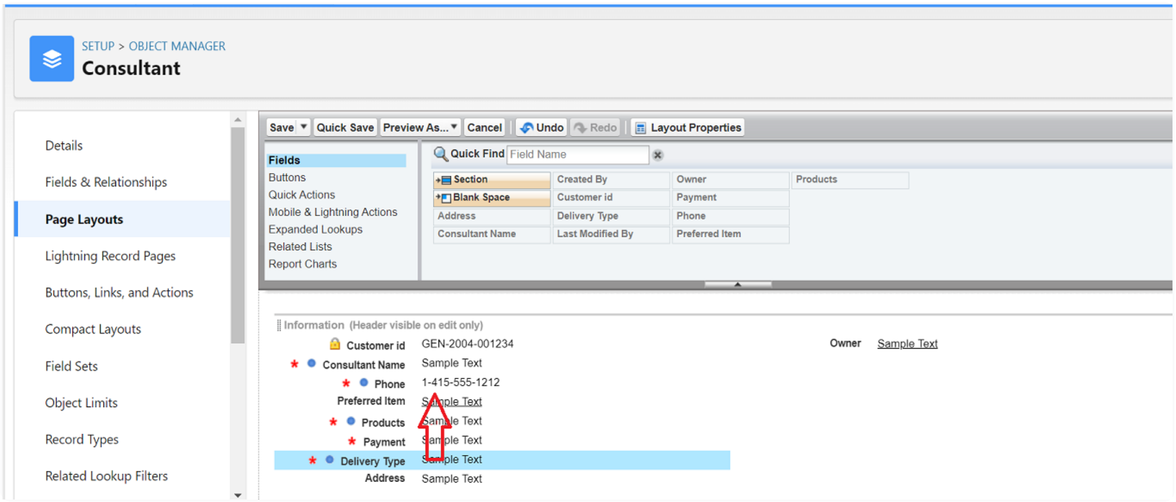
S No	Field Label	Data Type
1	Customer id	Auto Number
2	Customer Name	Text
3	Mobile Number	Phone
4	Email id	Email
5	Delivery Type 1)Self Pickup 2)Courier	Picklist
6	Products 1)Lipstick 2)Compact 3)EyeLiner 4)FacePack 5)Lip Balm 6)Nail Polish	Multi-Picklist
7	Payment 1)Debit Card 2)Credit Card 3)UPI 4)Cash	Picklist
8	Customer Details	Master-Detail Relationship (Our Customers Object)

Task 4 : Page Layout creation

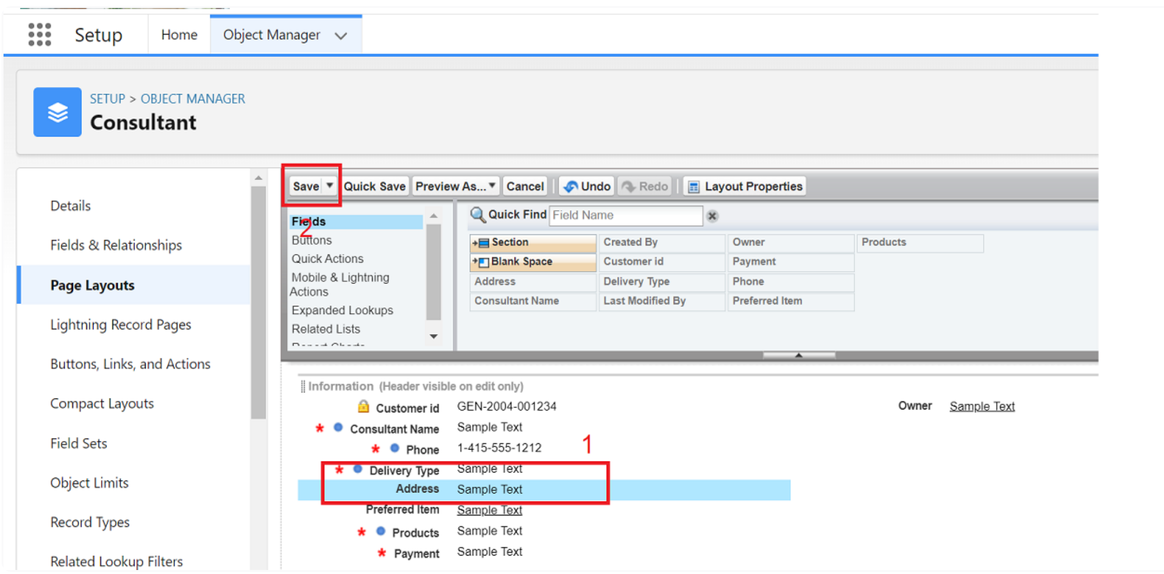
From the Salesforce setup menu, go to "Object Manager" and select the Consultants object.Click on "Page Layouts" in the left sidebar. This will display a list of available page layouts for the selected object.Select the Consultant Layout page layout.



Click And Drag Delivery type and Address Fields Below Phone field.



Click on Save

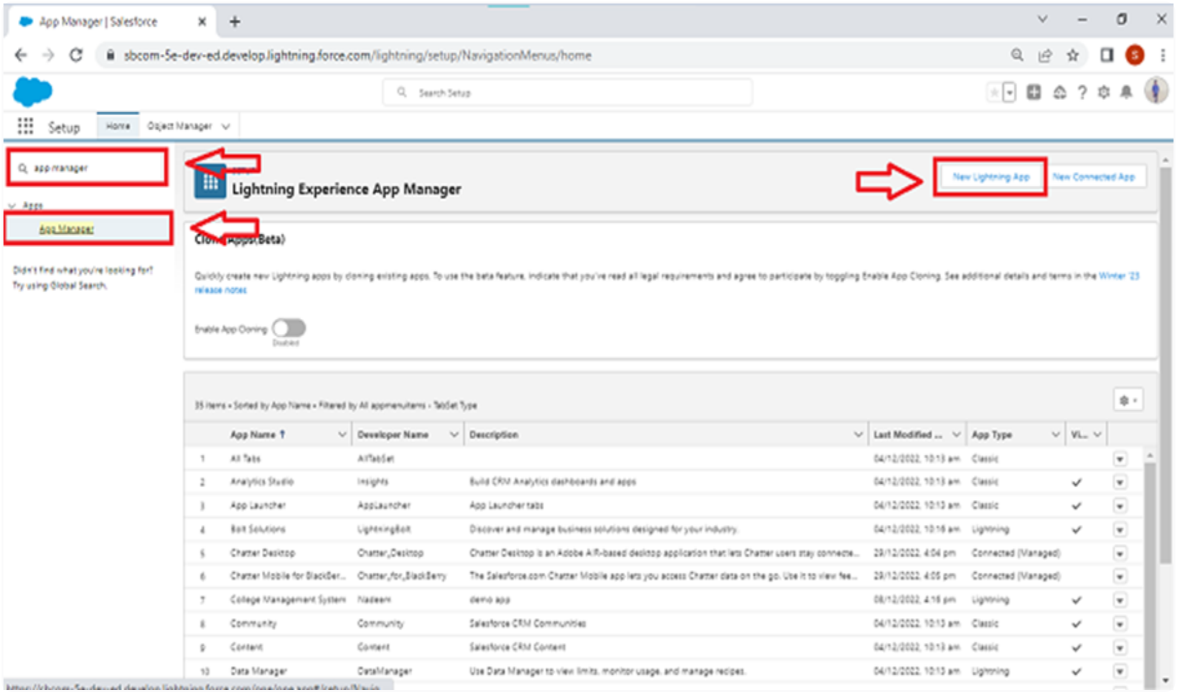


- Creating a page layout in Salesforce involves navigating to the object manager, selecting the relevant object, and either creating a new layout or editing an existing one. You can design the layout by dragging and dropping fields, adding sections and related lists, and including buttons or links as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

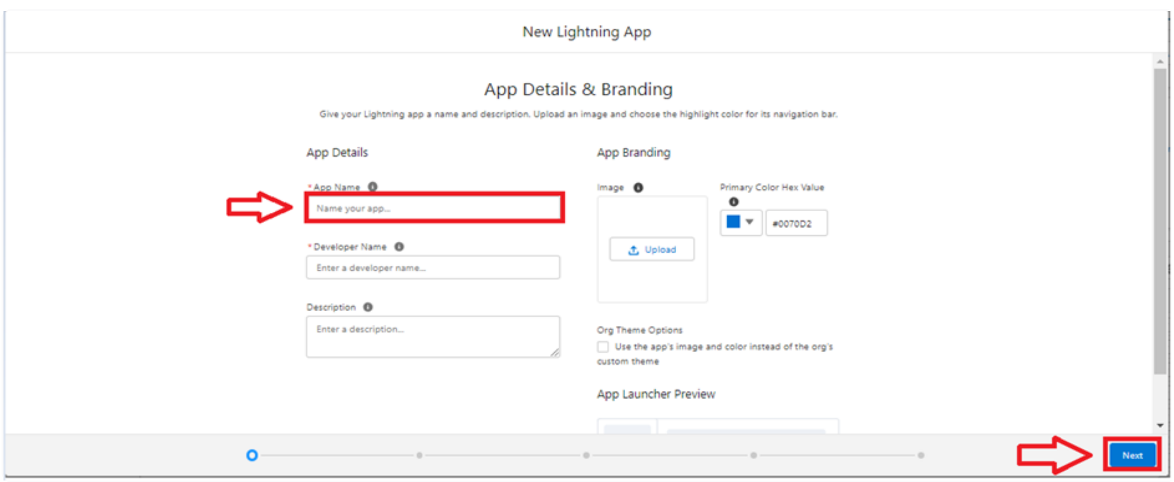
Task 5 : Creation of a Lightning App

To create a lightning app page:

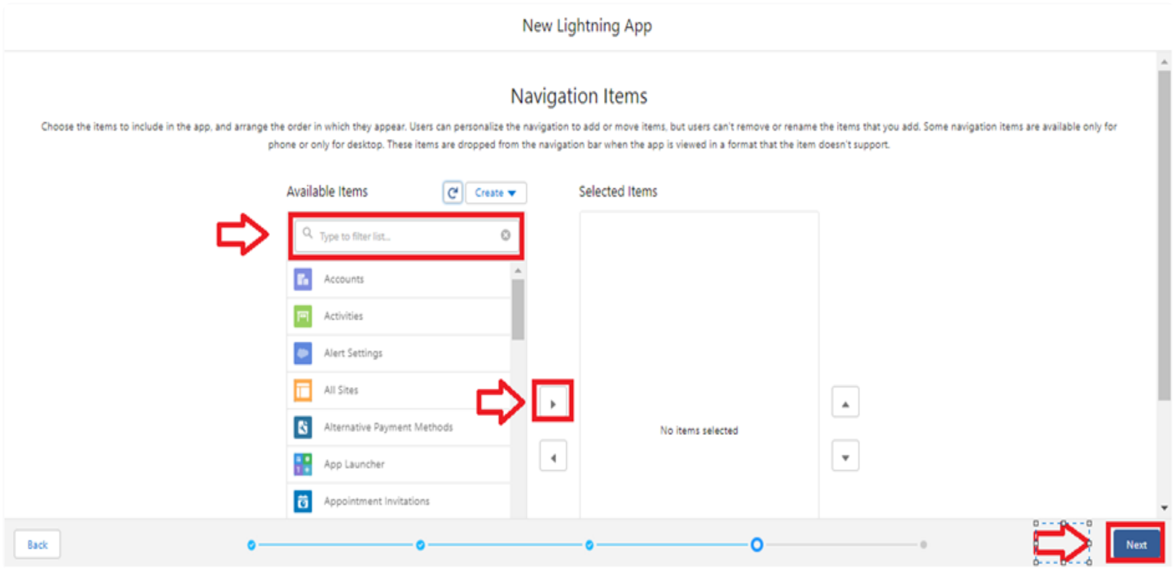
1. Go to setup page --> search “app manager” in quick find --> select “app manager” --> click on New lightning App.



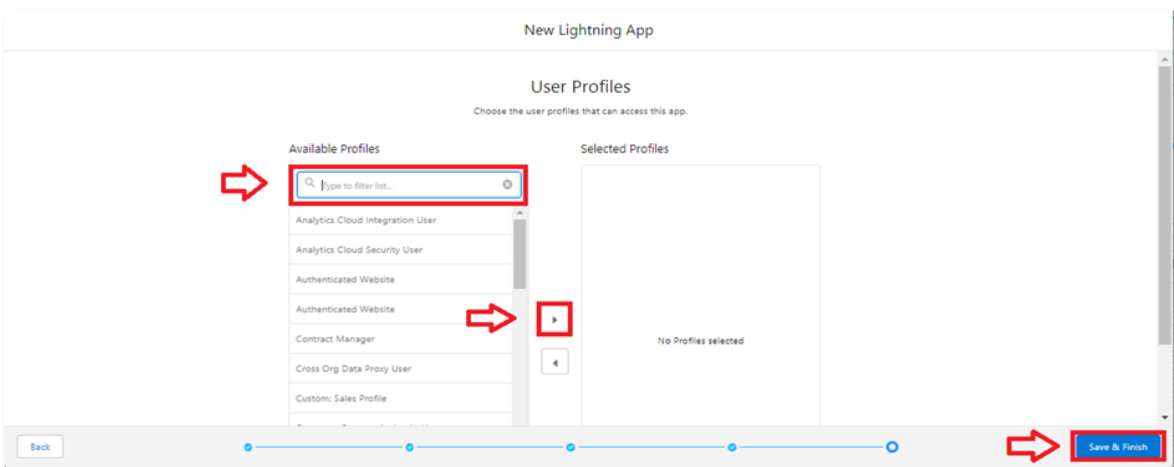
2. Fill the app name as Urban Color in app details and branding --> Next --> (App option page) keep it as default --> Next --> (Utility Items) keep it as default --> Next.



3. To Add Navigation Items:



4. Select 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:



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

Task 6 : Creating Profiles

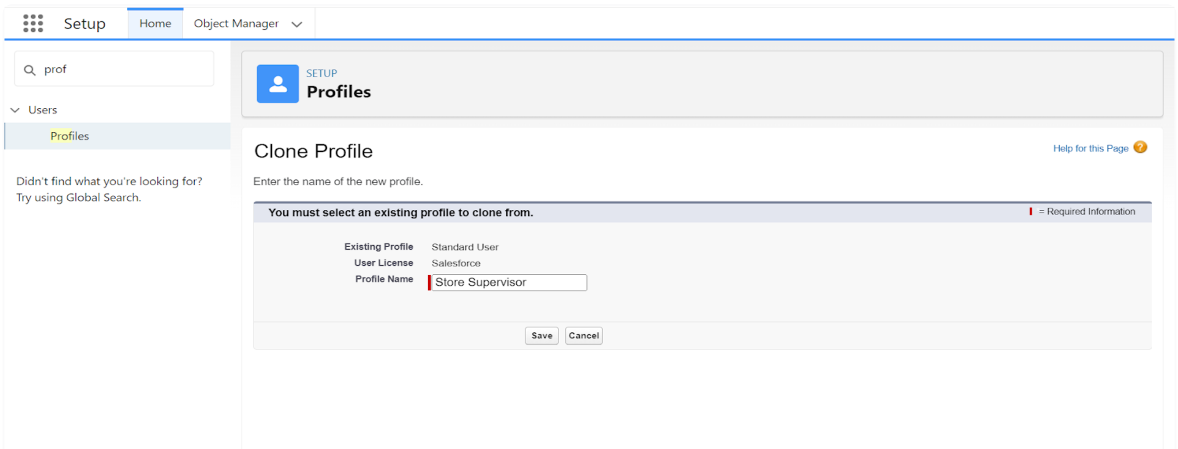
Now create a Store Supervisor profile and set its object permissions.

- 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.

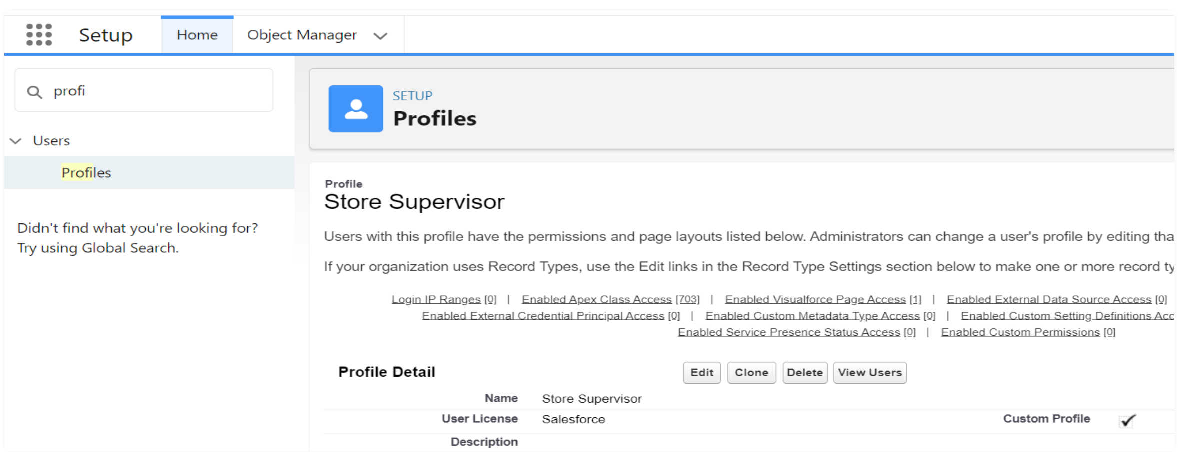
- Click Save.
- While still on the Store Supervisor profile page, then click Edit.
- Scroll down to Custom Object Permissions and give access for Create,Read,Edit,Delete,View all and modify all for Our Customers,Consultants,Retailers,Others.
- Scroll down to Custom App Settings and give access for Urban Color.

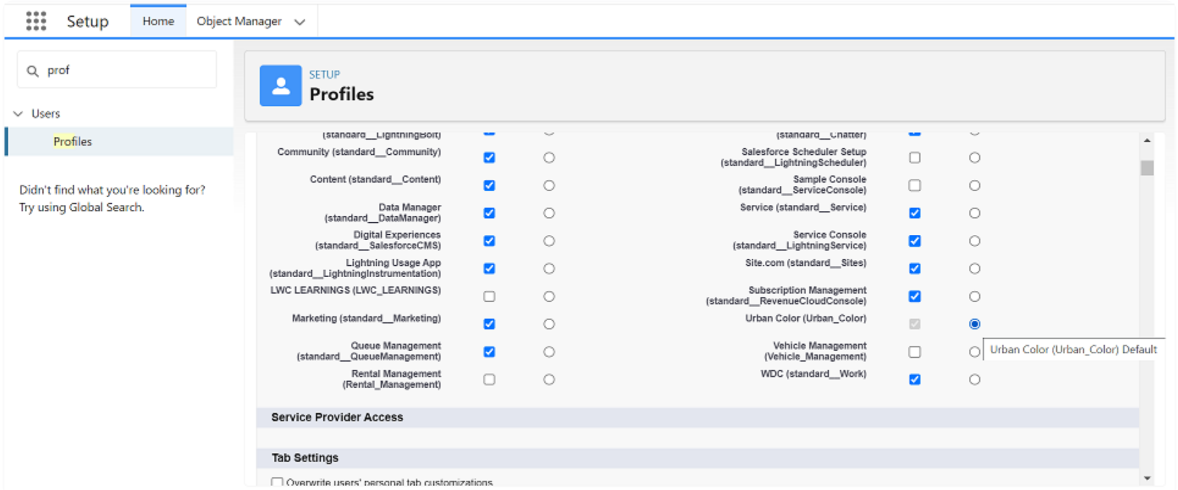
To create a new profile:

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.

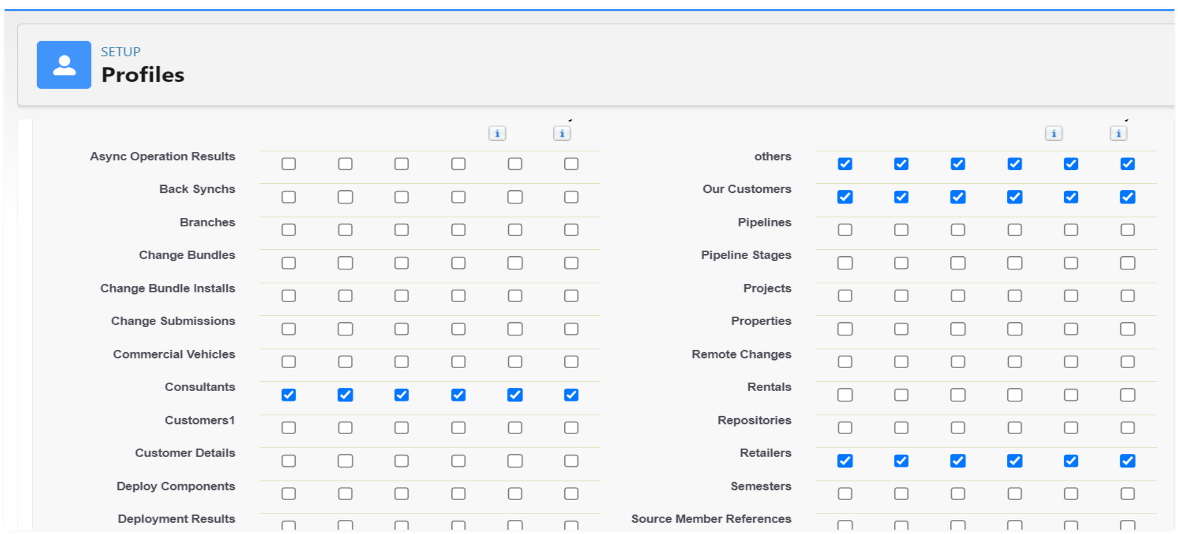


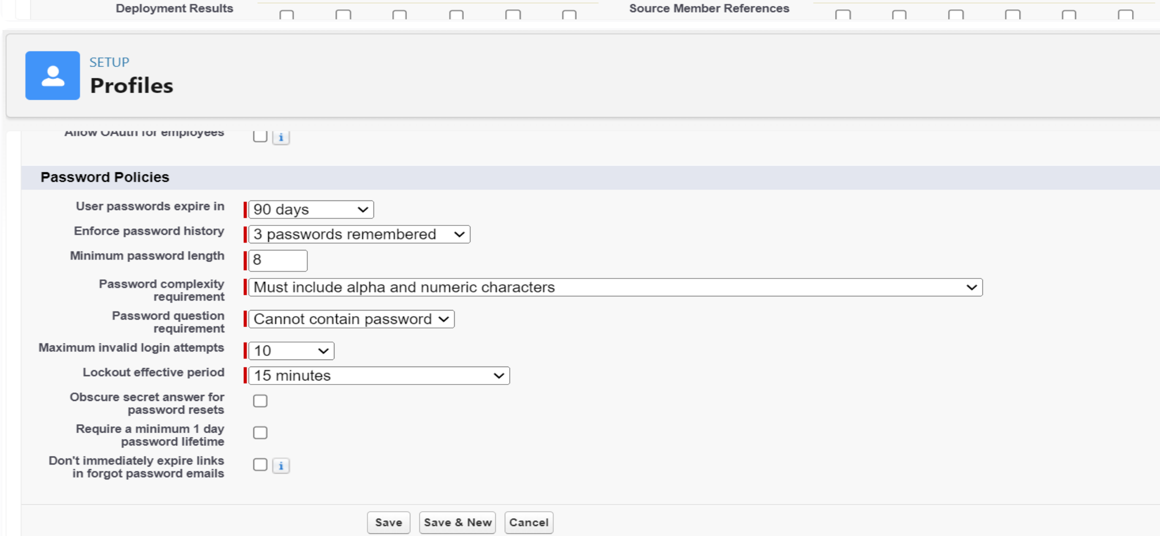
2. While still on the profile page, then click Edit.





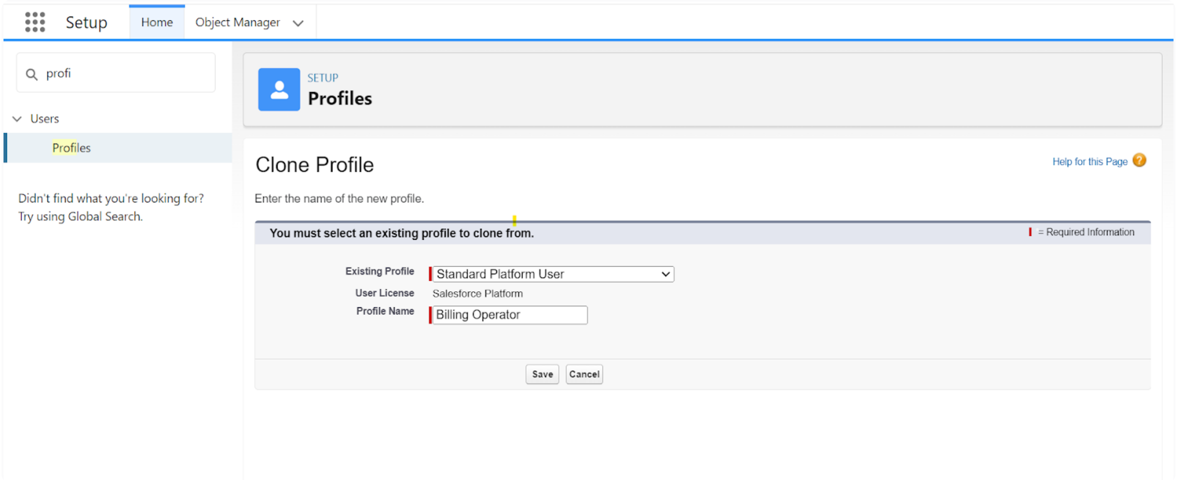
3. Scroll down to the Custom object permission and give all access to the Consultants, Others, Our Customers, Retailers object.

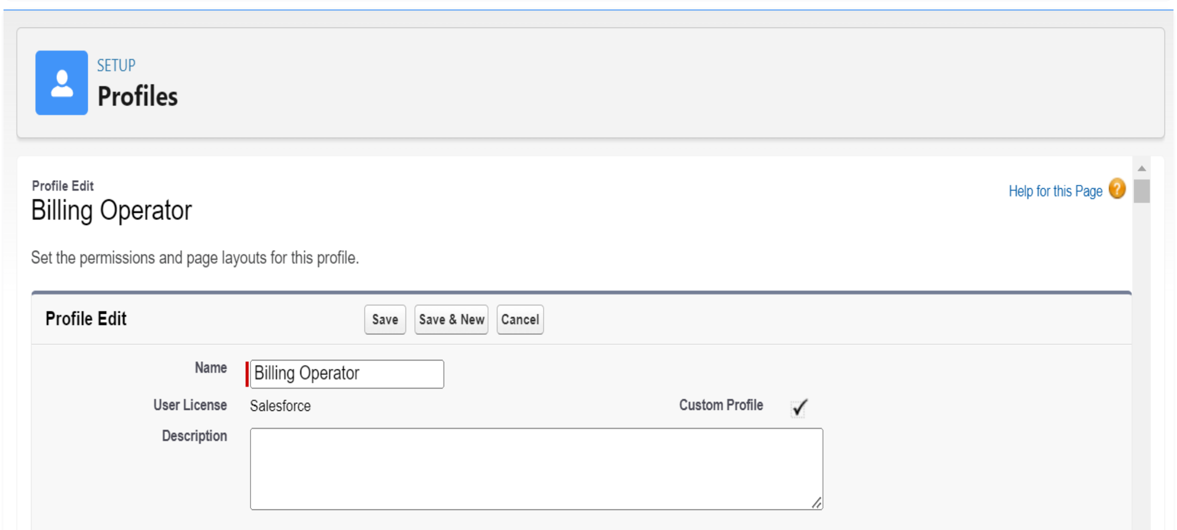


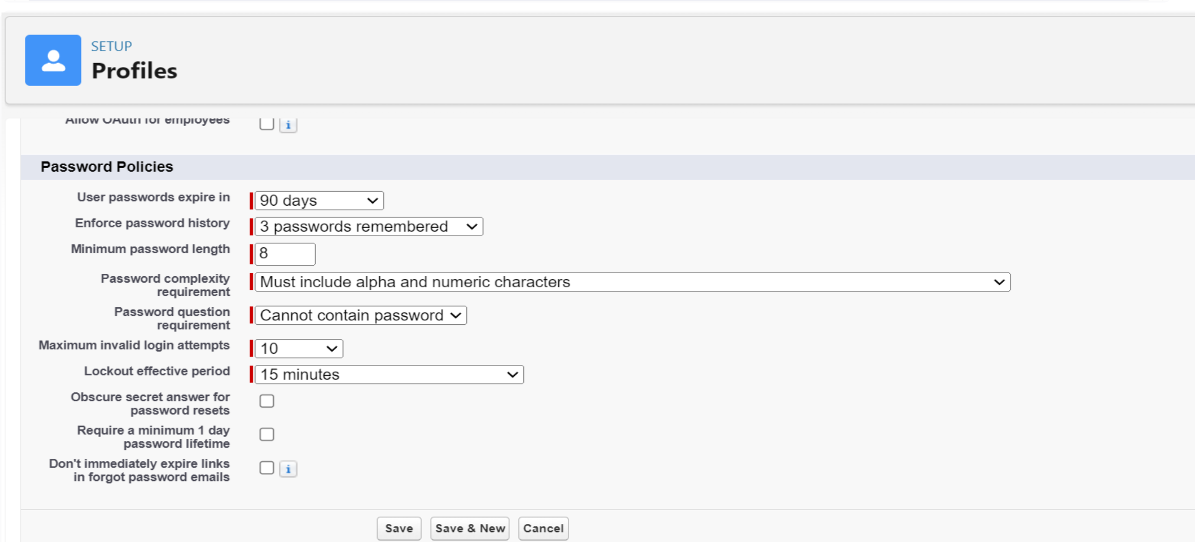


4. Click on Save.

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



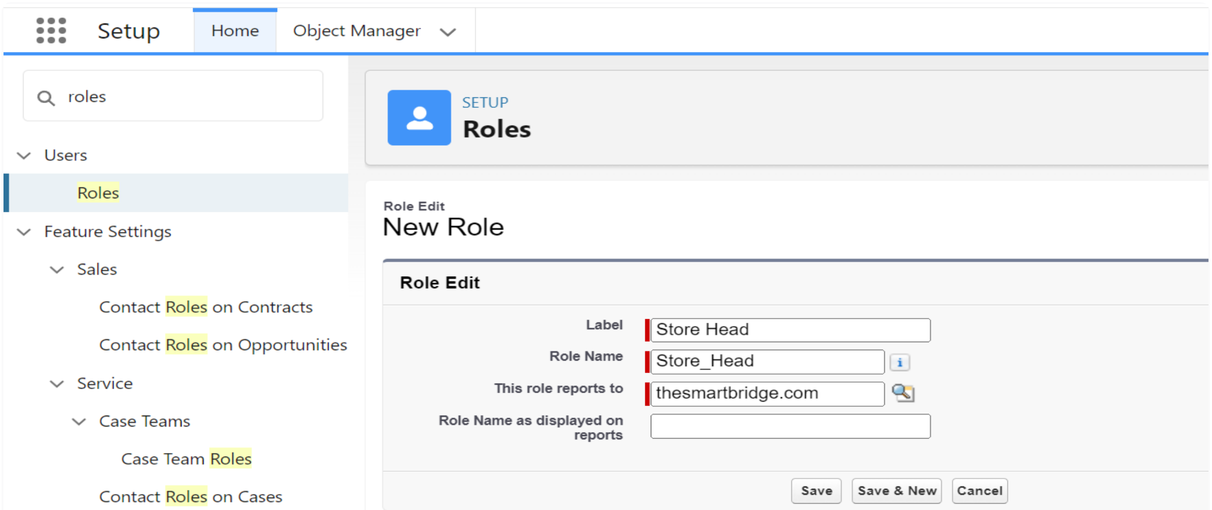


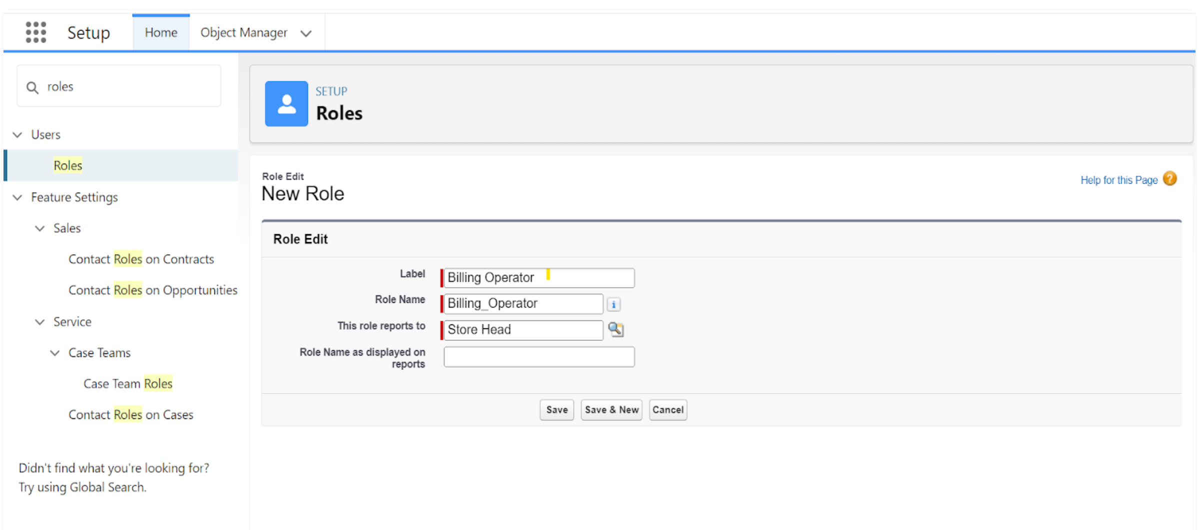


6. Click On save

Task 7 : Setting up Roles

1. Click on the Gear Icon
2. Click "Setup"
3. In the Quick Find box, enter "Roles"
4. Click "Roles"
5. Click on "Set Up Roles"
6. Click "Expand All"
7. Under the CEO, click on "Add Role"
8. Fill up the Label as Store Head, Role Name Store_Head.
9. Enter a Role name that will be displayed on Reports and click save, Similarly create One Roles under Store Head as Billing Operator.

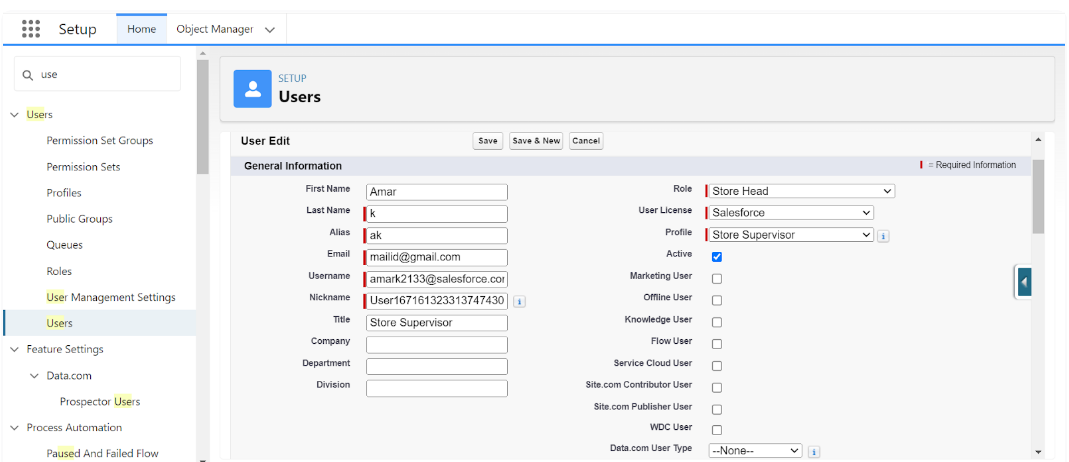


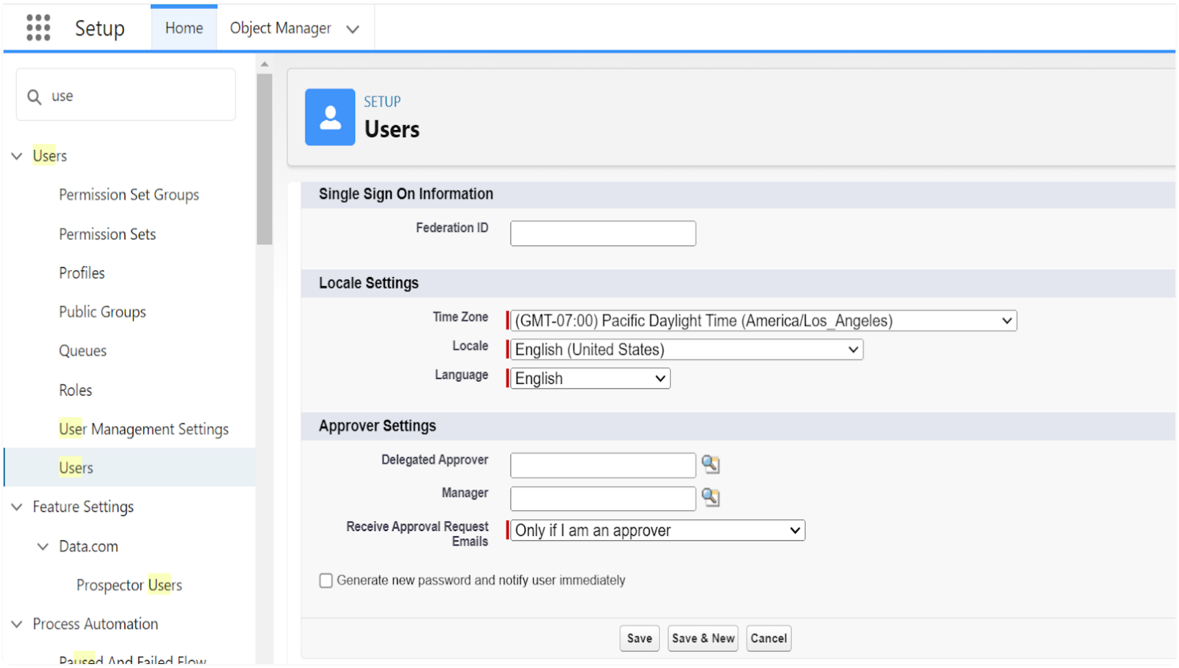


Task 8 : Creation of Users

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.

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



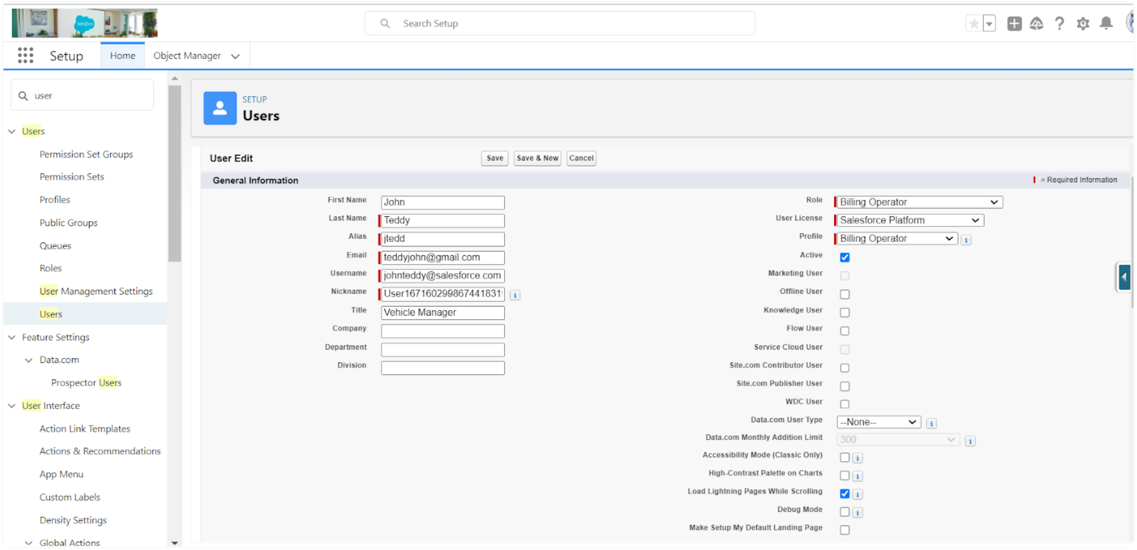


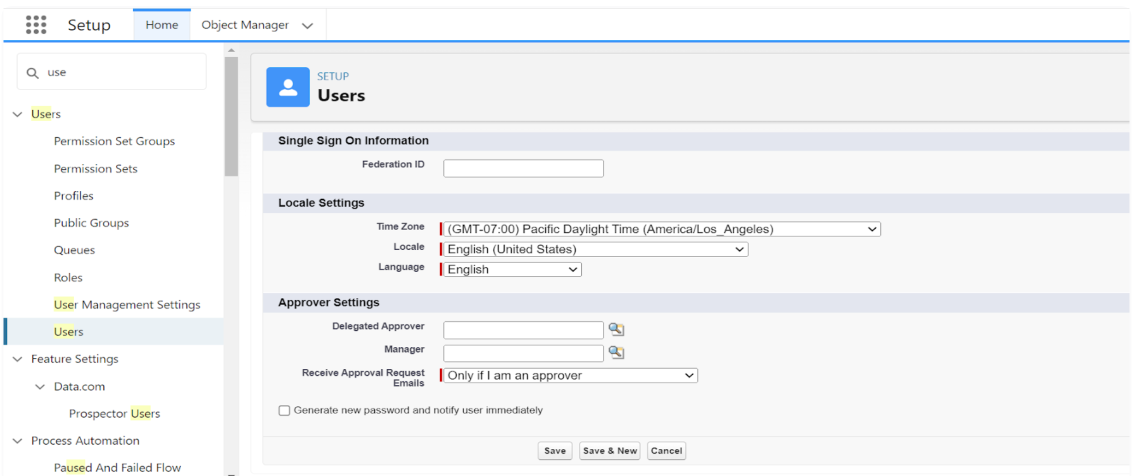
Second User Creation

1. From Setup, in the Quick Find box, enter Users, and then select Users.
2. Click New User.
3. Enter the user's name John Teddy and (Your) email address and a unique username in the form of an email address. By default, the username is the same as the email address.
4. Select a Role(Billing Operator)
5. Select a User Licence 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.

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

- 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.





Task 9 : User Adoption

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

Create Our Customer Record

1.Click on App Launcher on left side of screen.

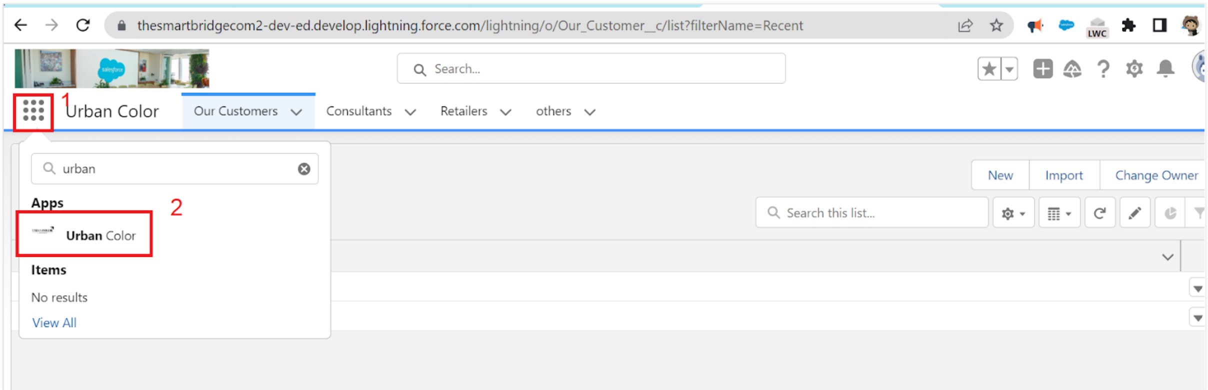
2.Search Urban Color & click on it.

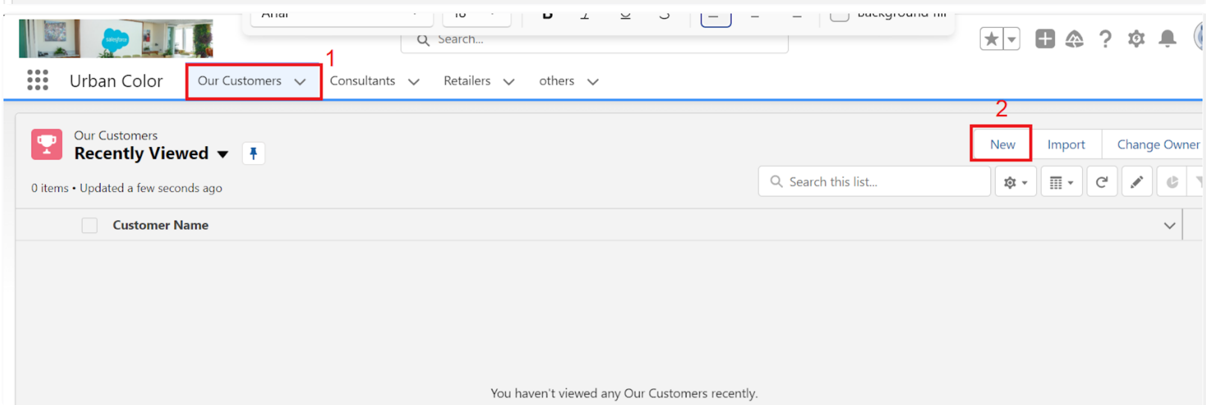
3.Click on Our Customer tab.

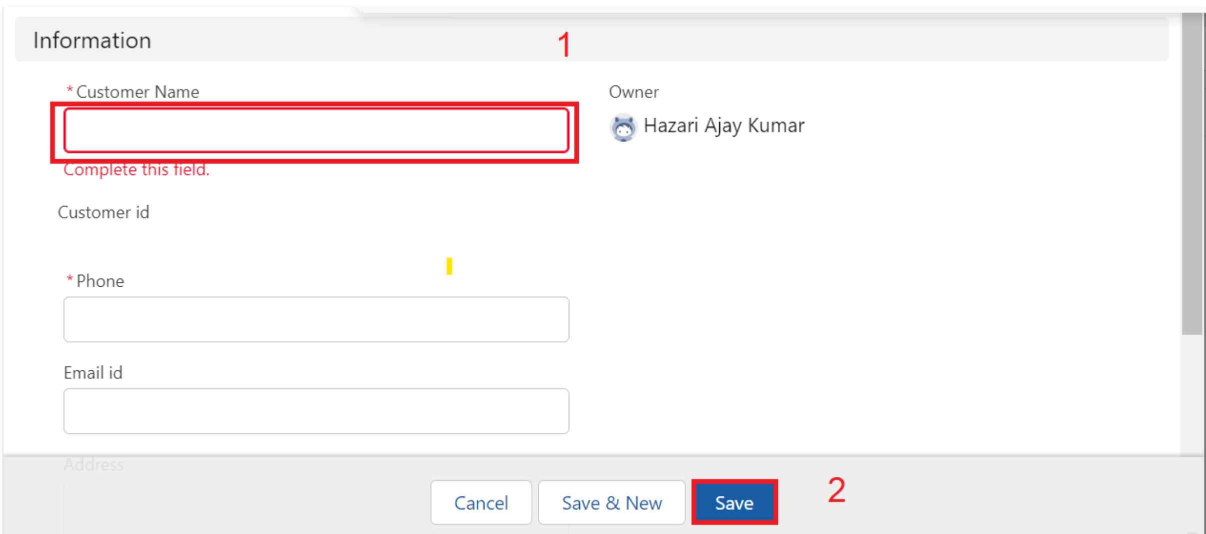
4.Click new button

5.Fill all Our Customer record details.

6.Click on Save Button

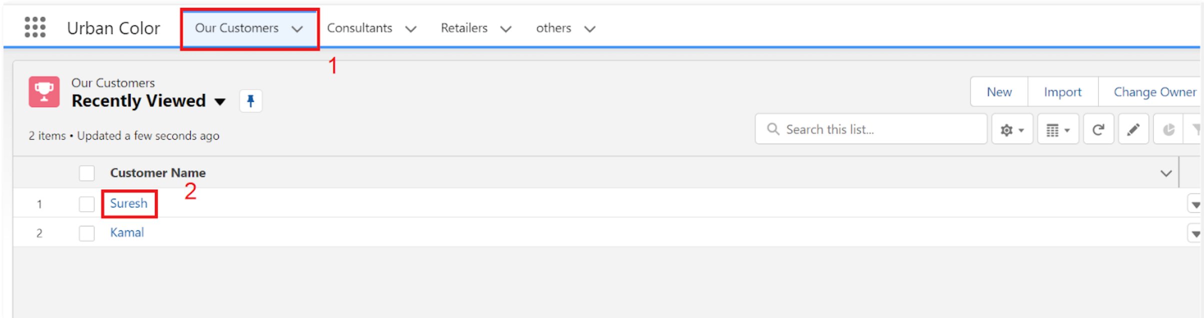


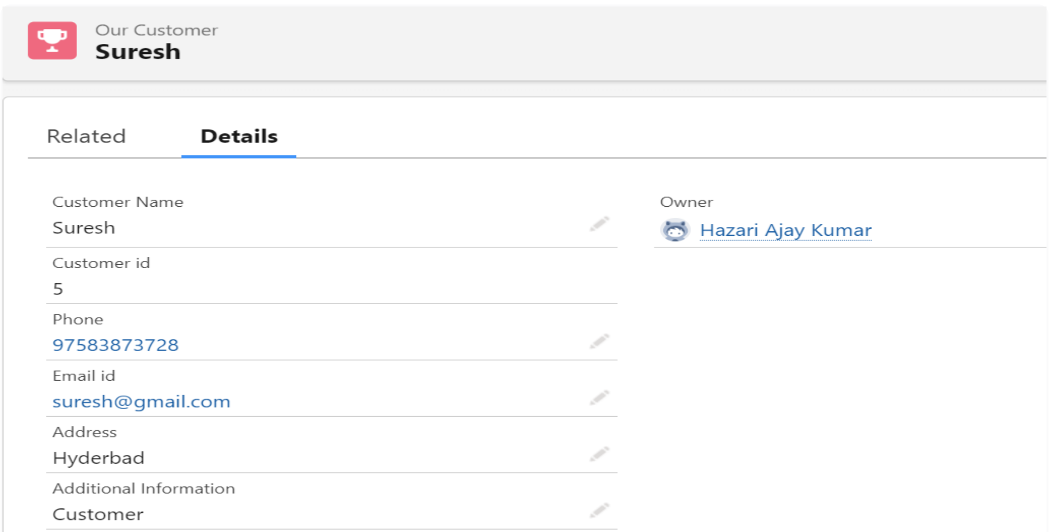




View Record (Our Customer):

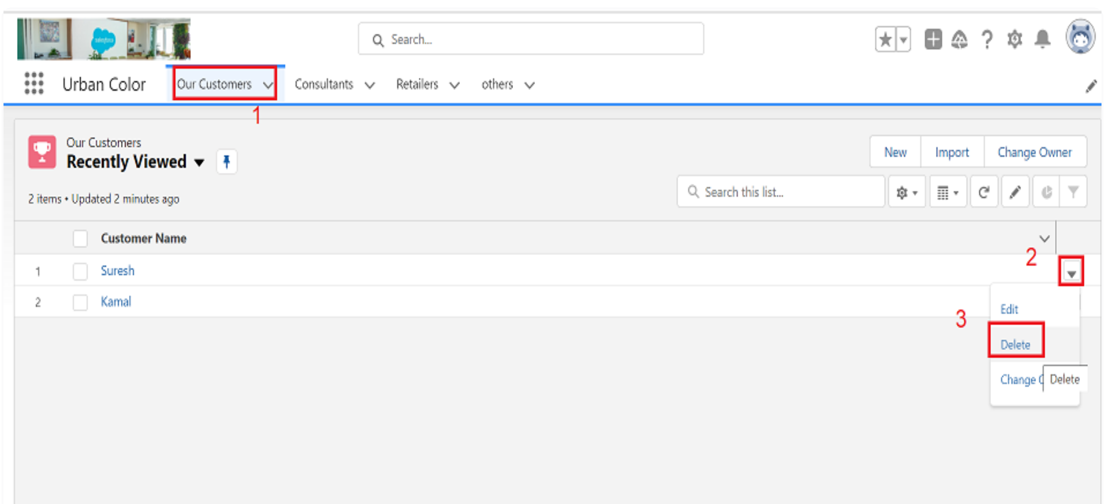
1. Click on App Launcher on the left side of the screen.
2. Search Urban Color & click on it.
3. Click on Our Customer Tab.
4. Click on any record name. you can see the details of the Our Customer

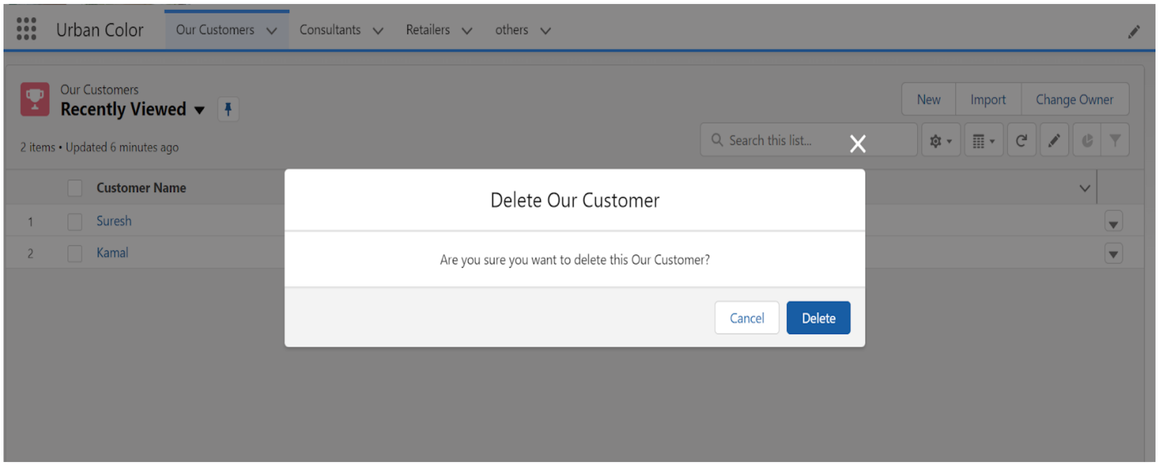




Delete Record (Our Customer):

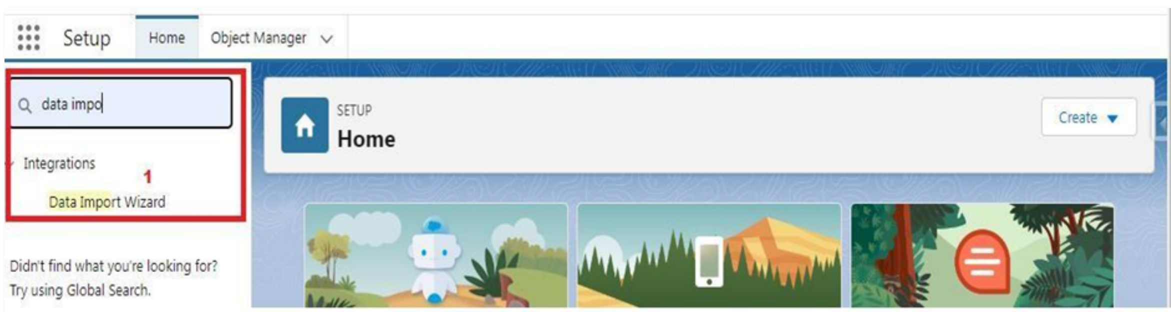
1. Click on App Launcher on the left side of the screen.
2. Search Urban Color & click on it.
3. Click on Our Customer Tab.
4. Click on Arrow at right hand side on that Particular record.
5. Click delete and delete again.



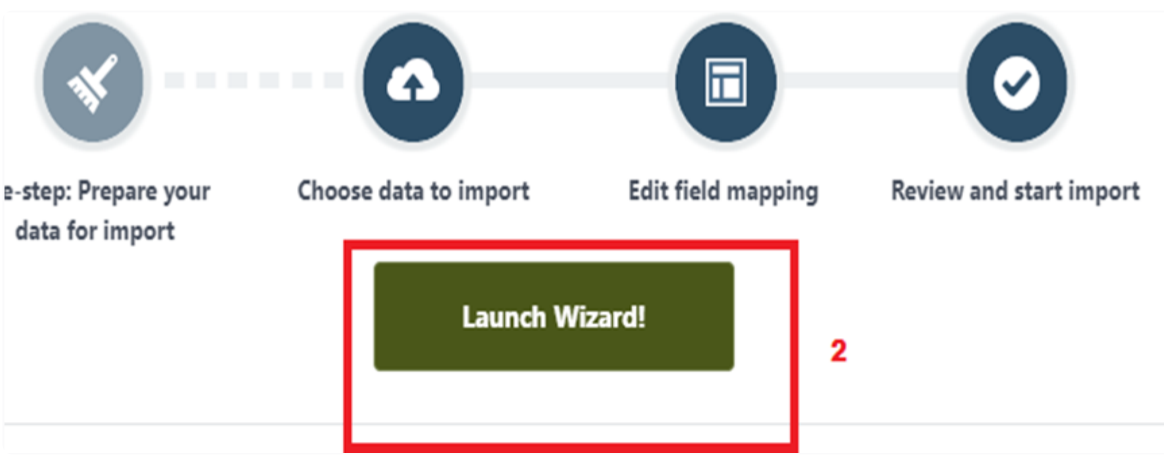


Task 10 : Import Data

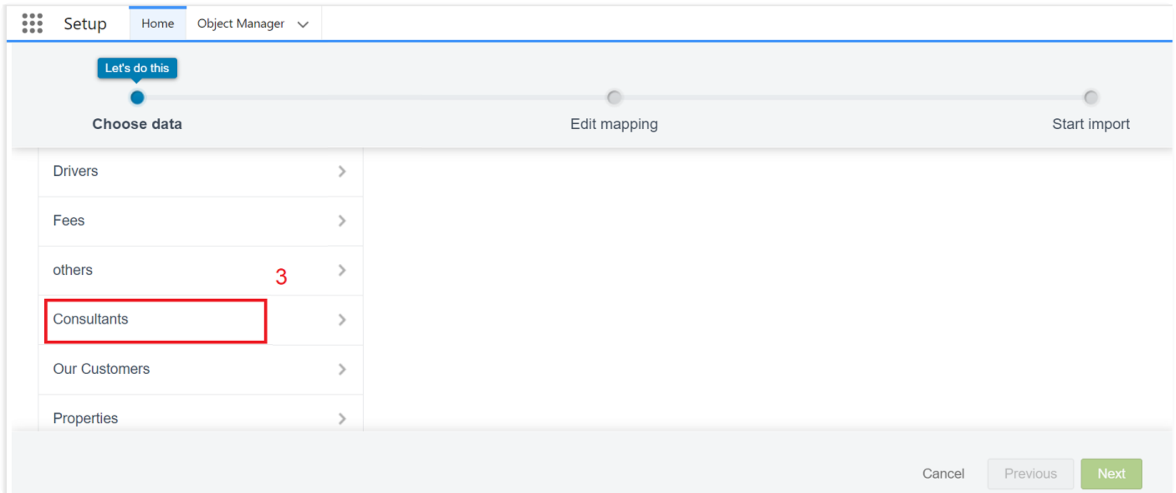
1. From Setup, click the Home tab.
2. In the Quick Find box, enter Data Import and select Data Import Wizard



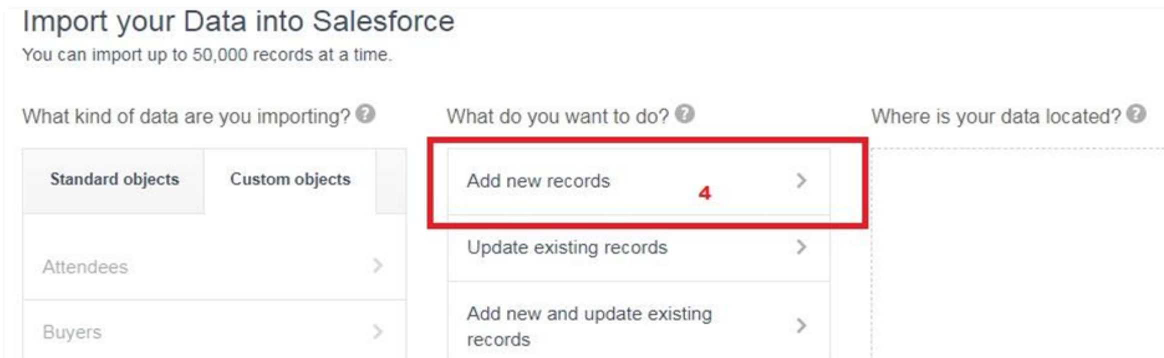
3. Click Launch Wizard!



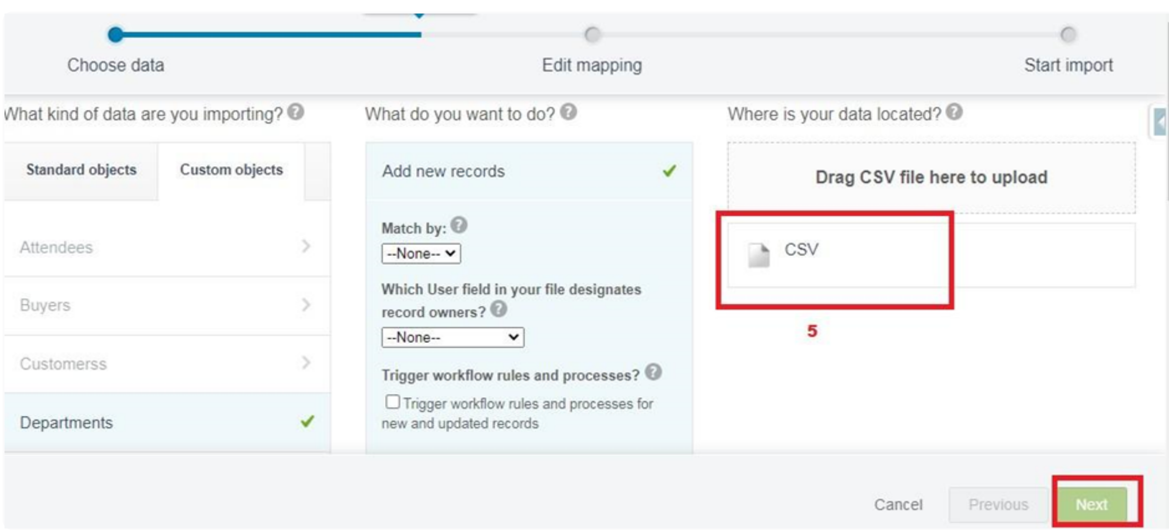
4. Click the Custom Objects tab and select the Consultant object.



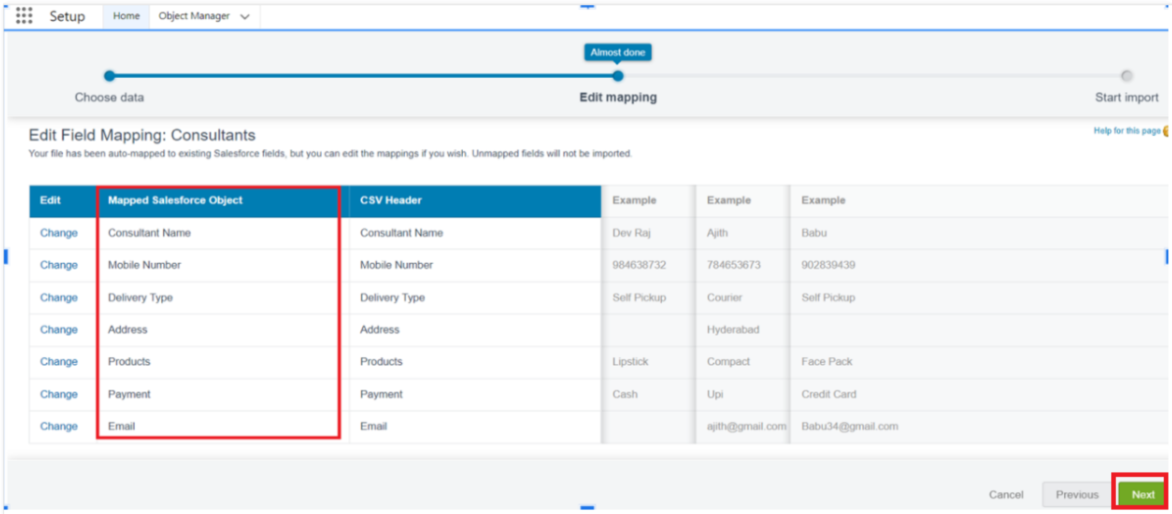
5. Select Add new records.



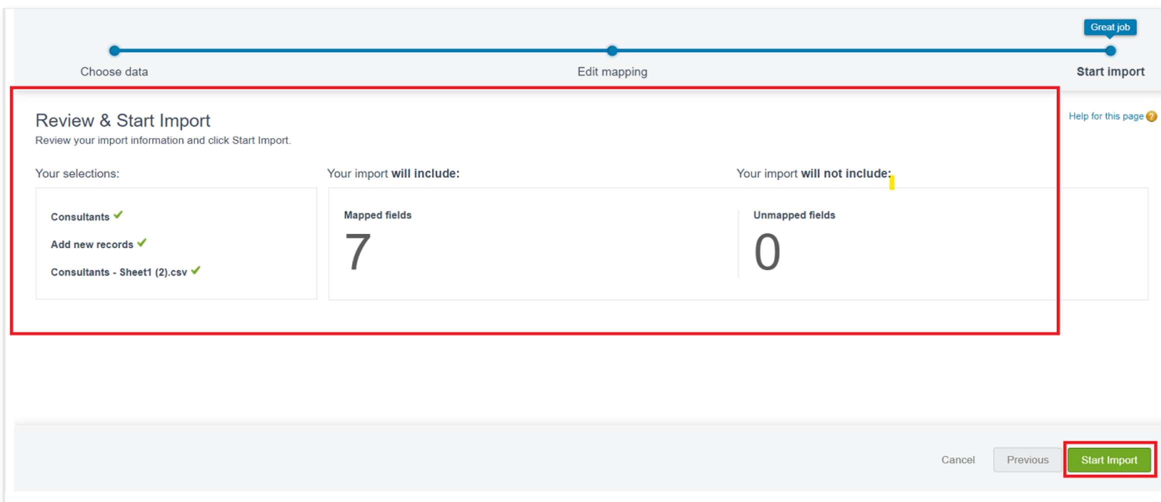
6. Click CSV and choose file Consultant_CSV which we made earlier. Click Next.



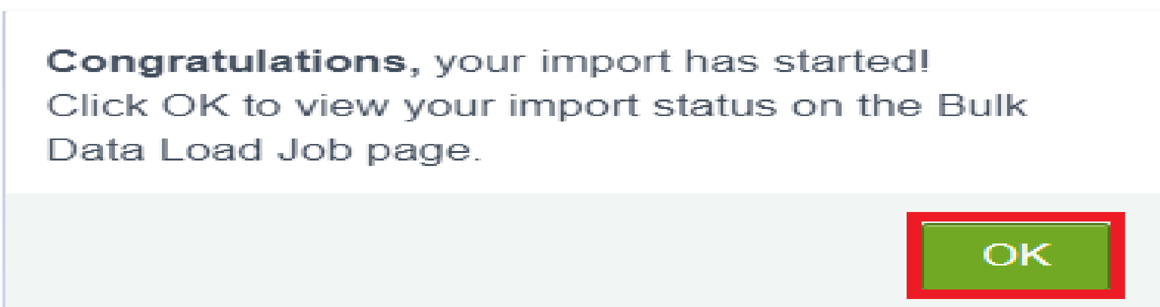
7. Since the field names in the CSV file (CSV Header) are the same as the field names in your object (Mapped Salesforce Object), the fields are automatically mapped. Click Next.



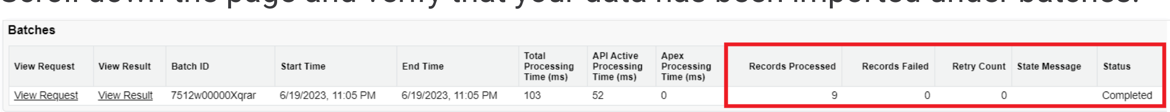
8. The next screen gives you a summary of your data import. Click Start Import.



9. Click OK on the popup.



10. Scroll down the page and verify that your data has been imported under batches.

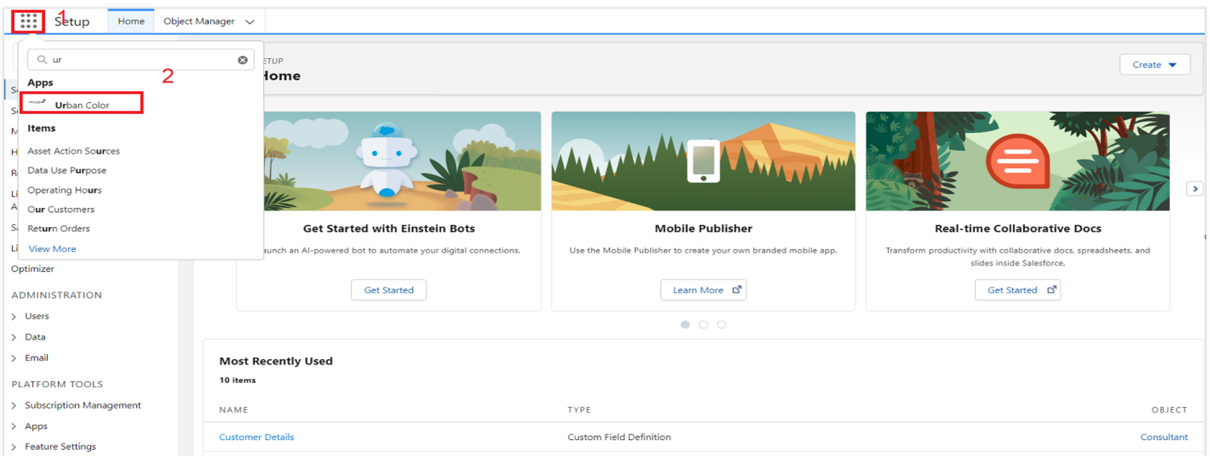


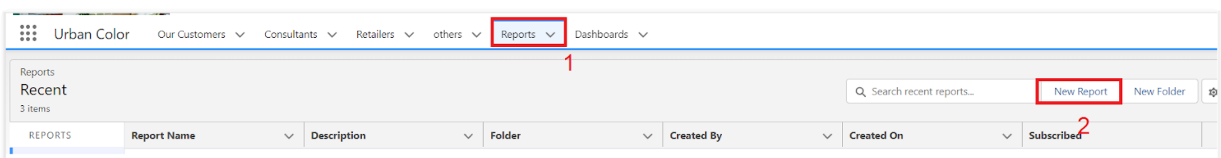
11. Make sure you have 0 records under the records failed column.

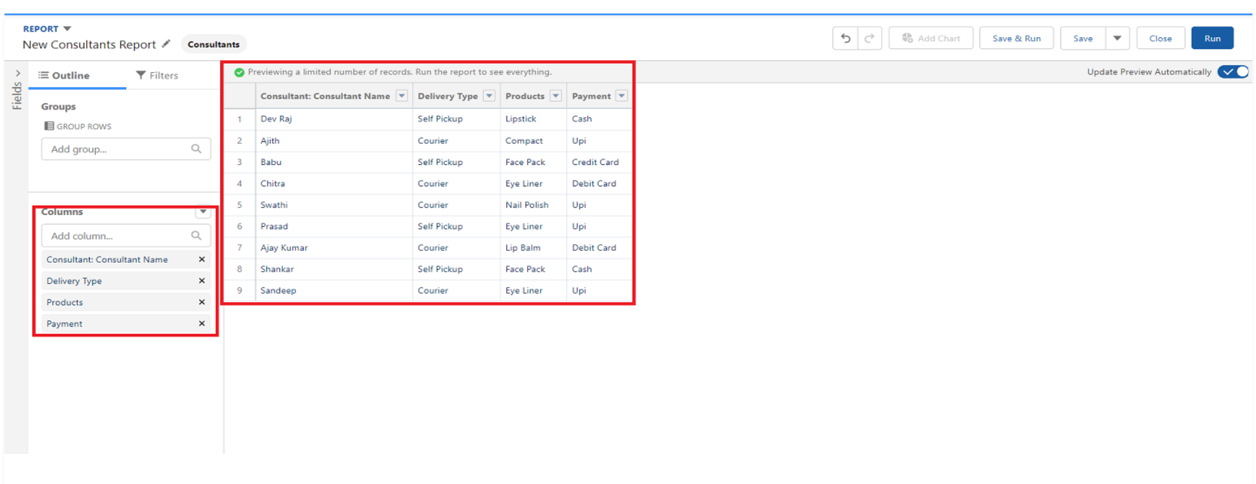
Note - Do Field mapping carefully.

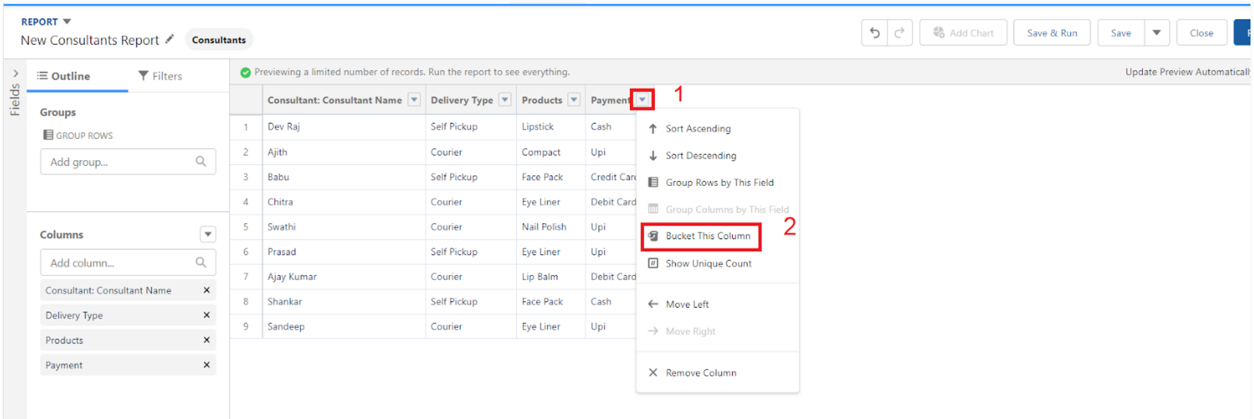
Task 11 : Creation and Accessing of Reports

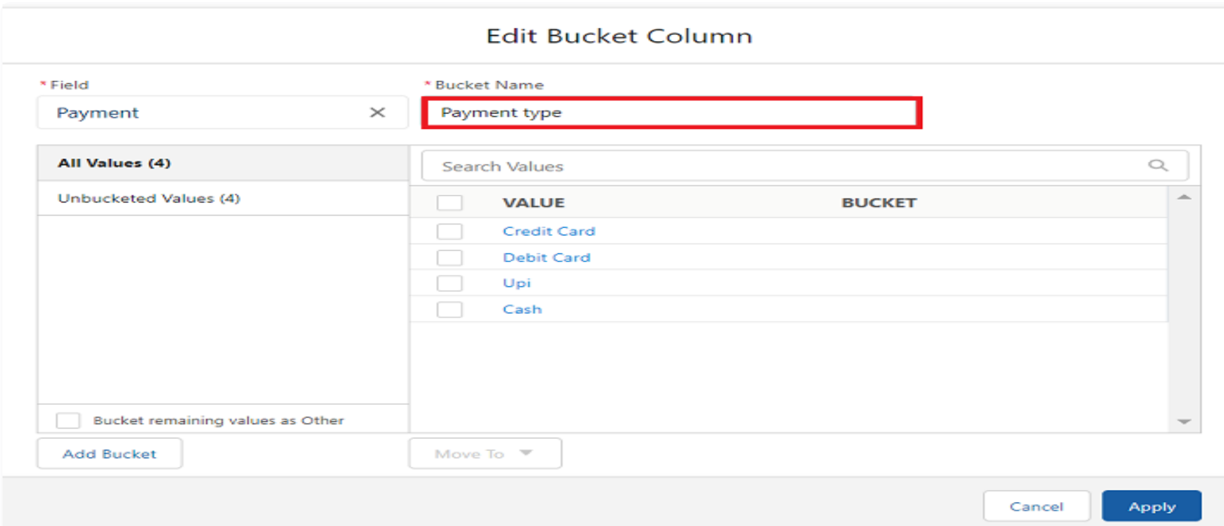
- Click App Launcher and select Urban Color App then click reports tab now click New Report. Click the report type as Consultants Click Start report.Customize your report, in Columns select - ConsultantName,Delivery type,Products,Payment then click on the drop down option on the payment column and select Bucket this column.
- Bucket Name as Payment type and click on Add Bucket and name it as NetBanking then click on Add Bucket and name it as Cash now click on All Values and select Credit card,Debit card,Upi and Move to Net Banking.Now click on All Values again and select Cash and Move to Cash. Finally, click on Apply.

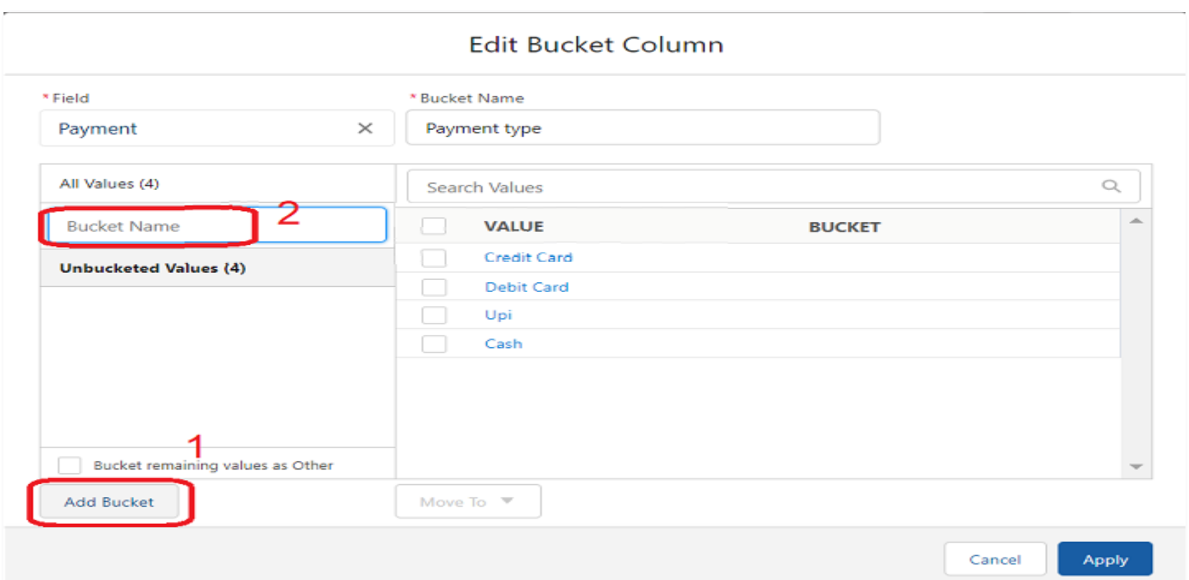


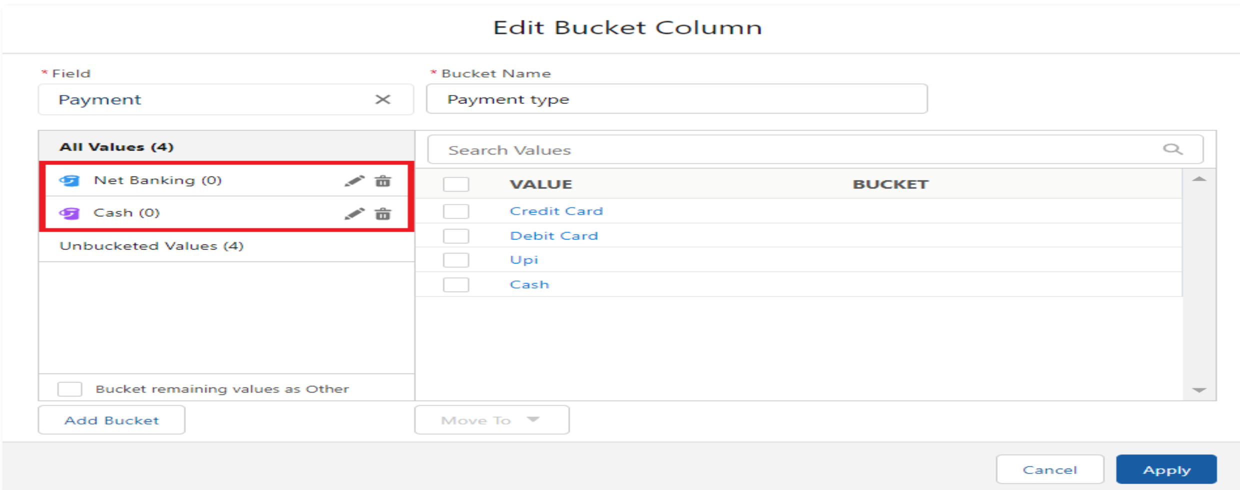


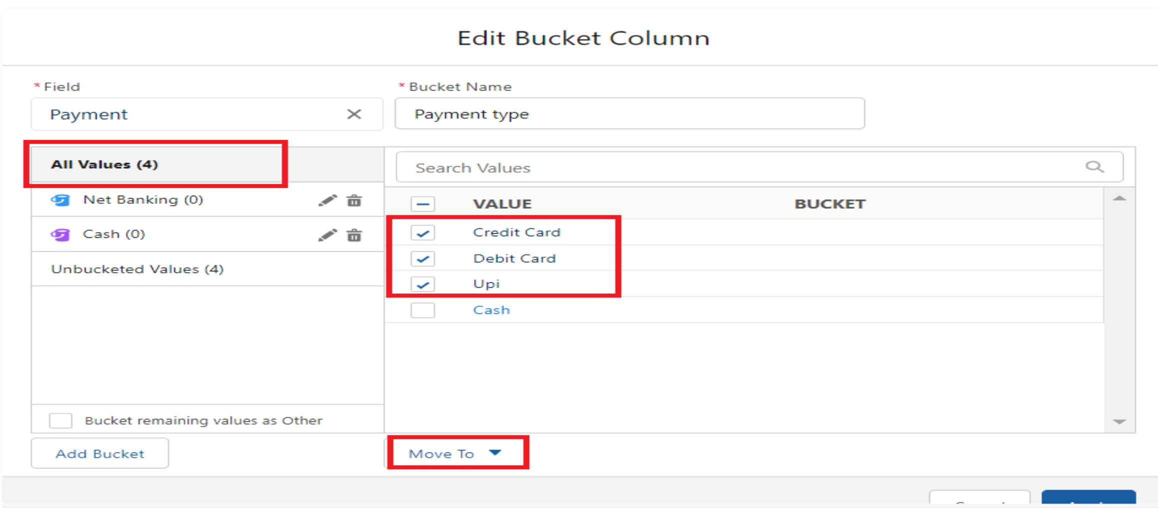


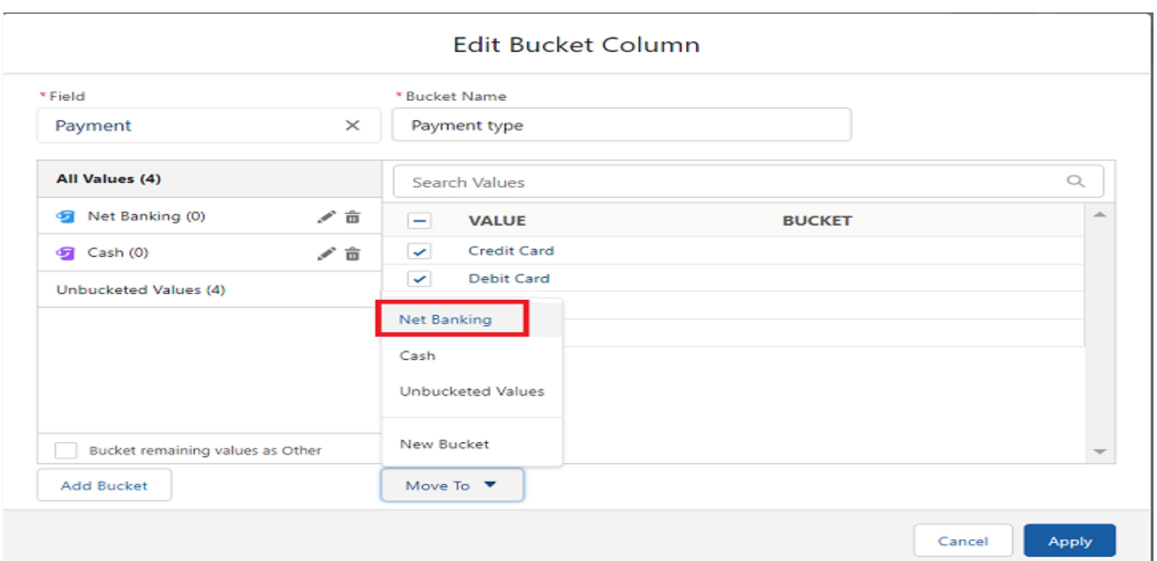

REPORT
New Consultants Report
Consultants
Add Chart
Save & Run
Save
Close
Outline
Filters
Groups
GROUP ROWS
Add group...
Columns
Add column...
Consultant: Consultant Name
Delivery Type
Products
Payment
Previewing a limited number of records. Run the report to see everything.
Update Preview Automaticall
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
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
Sort Ascending
Sort Descending
Group Rows by This Field
Group Columns by This Field
Bucket This Column
2
Show Unique Count
Move Left
Move Right
Remove Column

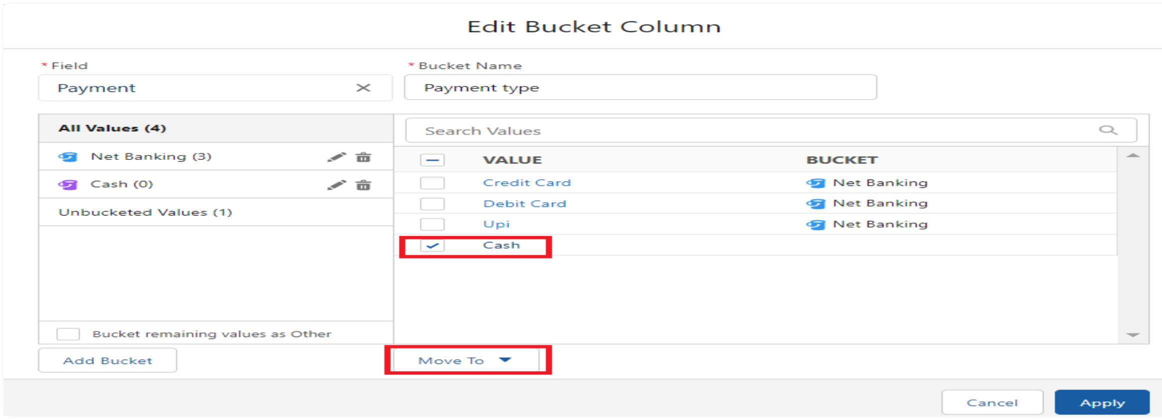

Edit Bucket Column
* Field
Payment
* Bucket Name
Payment type
All Values (4)
Unbucketed Values (4)
Search Values
VALUE
BUCKET
Credit Card
Debit Card
Upi
Cash
Bucket remaining values as Other
Add Bucket
Move To
Cancel
Apply

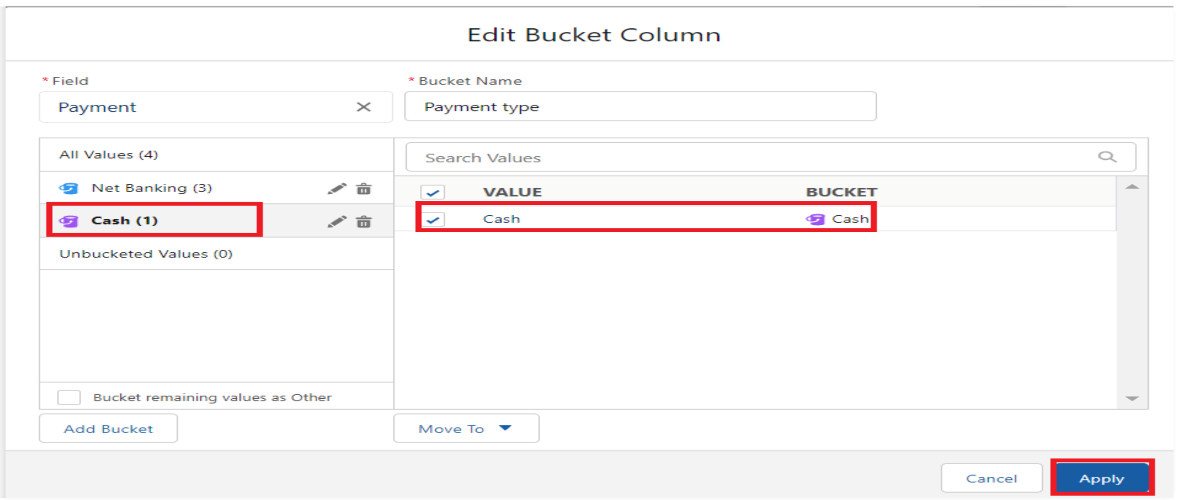

Edit Bucket Column
* Field
Payment
* Bucket Name
Payment type
All Values (4)
Bucket Name
2
Unbucketed Values (4)
Search Values
VALUE
BUCKET
Credit Card
Debit Card
Upi
Cash
1
Bucket remaining values as Other
Add Bucket
Move To
Cancel
Apply


Edit Bucket Column
* Field
Payment
* Bucket Name
Payment type
All Values (4)
Net Banking (0)
Cash (0)
Unbucketed Values (4)
Search Values
VALUE
BUCKET
Credit Card
Debit Card
Upi
Cash
Bucket remaining values as Other
Add Bucket
Move To
Cancel
Apply

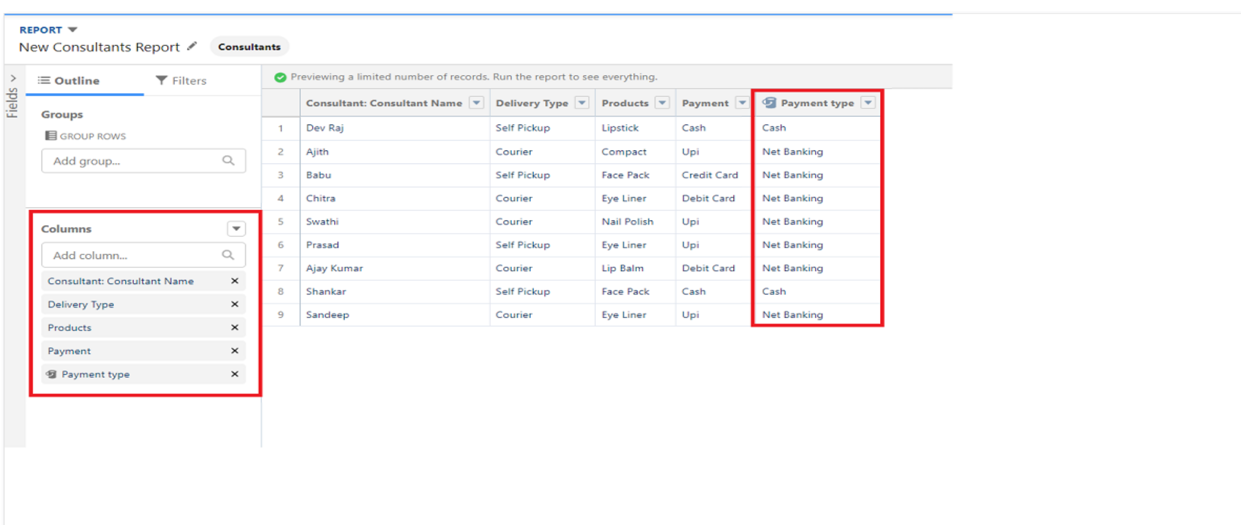

Edit Bucket Column
* Field
Payment
* Bucket Name
Payment type
All Values (4)
Net Banking (0)
Cash (0)
Unbucketed Values (4)
Search Values
VALUE
BUCKET
Credit Card
Debit Card
Upi
Cash
Bucket remaining values as Other
Add Bucket
Move To

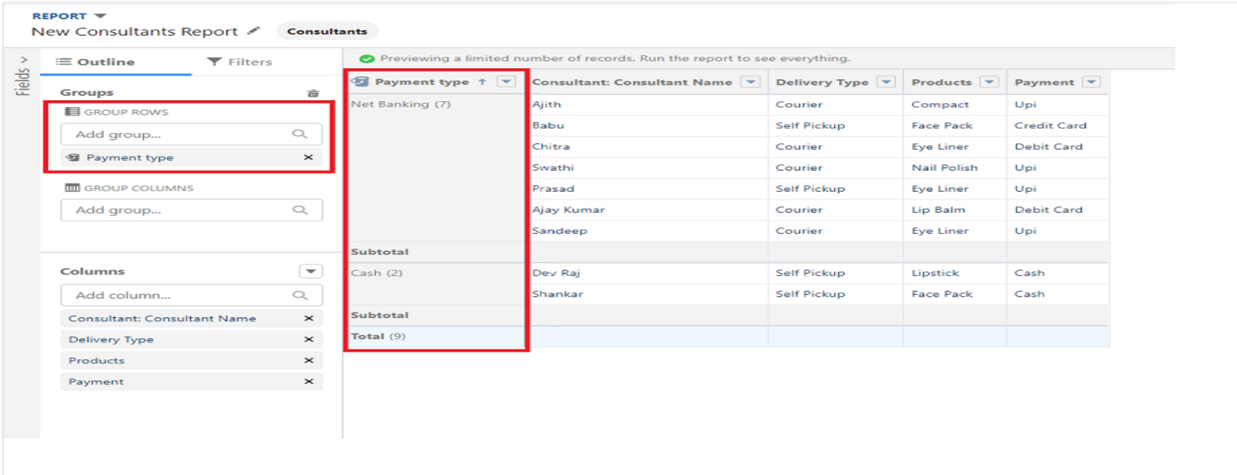

Edit Bucket Column
* Field
Payment
* Bucket Name
Payment type
All Values (4)
Net Banking (0)
Cash (0)
Unbucketed Values (4)
Search Values
VALUE
BUCKET
Credit Card
Debit Card
Net Banking
Cash
Unbucketed Values
New Bucket
Bucket remaining values as Other
Add Bucket
Move To
Cancel
Apply

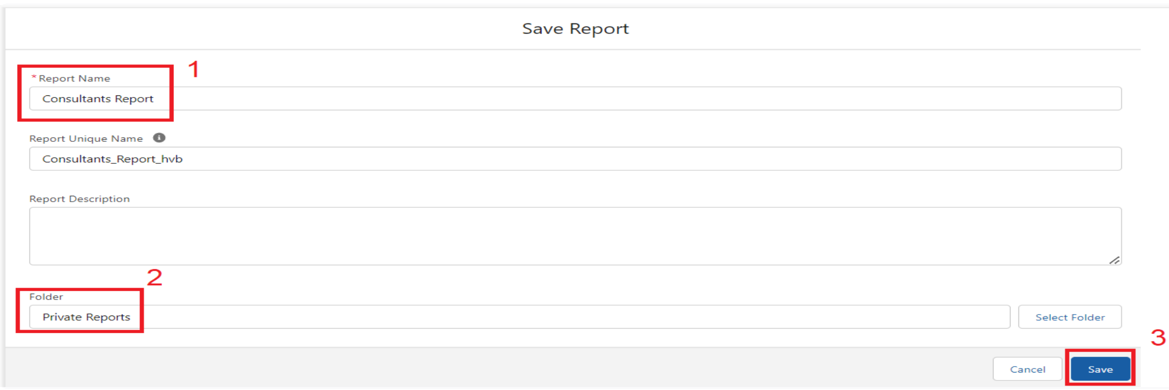




In Group Rows Add Payment Type Bucket Field and click refresh now click Save and Run then give report name – Consultant report and click Save

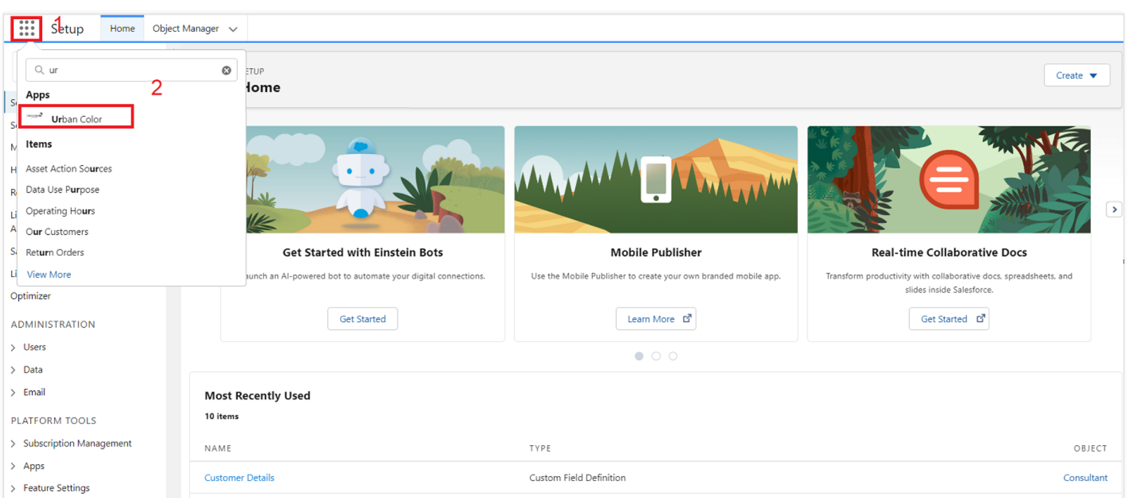


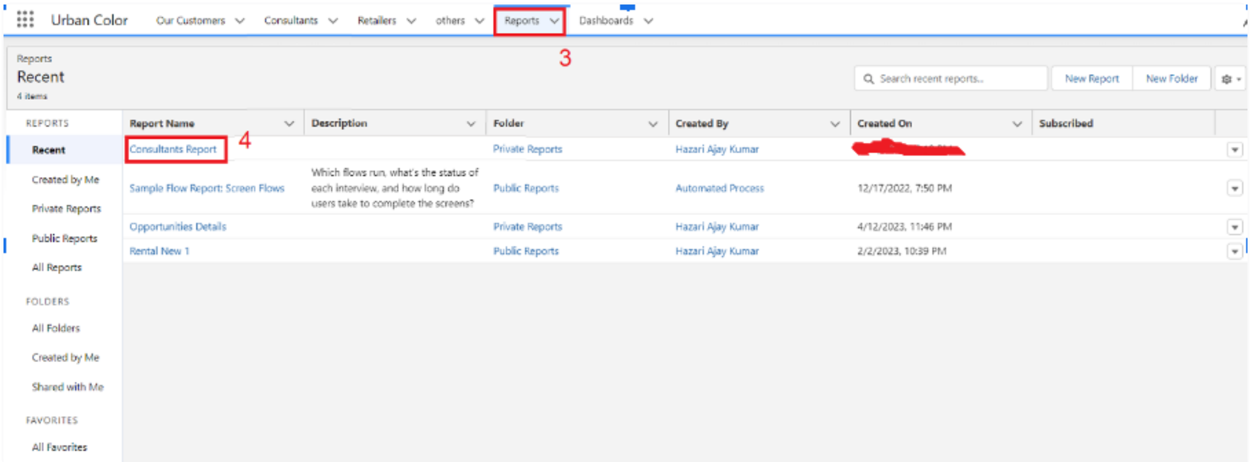




View Report

- Click on App Launcher on the left side of the screen and search Urban Color App & click on it.Then click on Reports Tab and click on Urban Color Report and see records

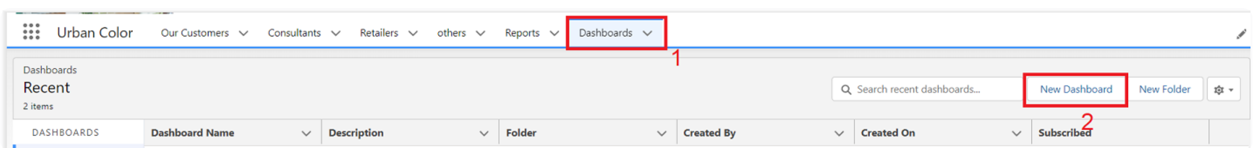


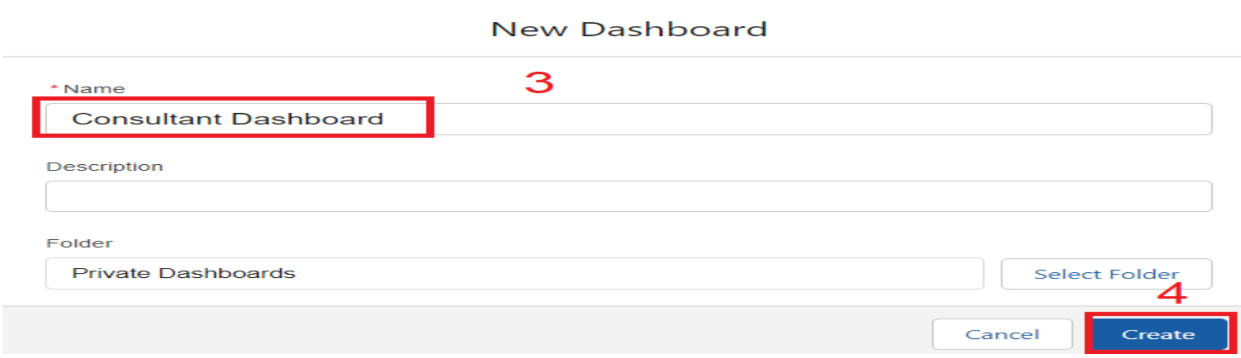


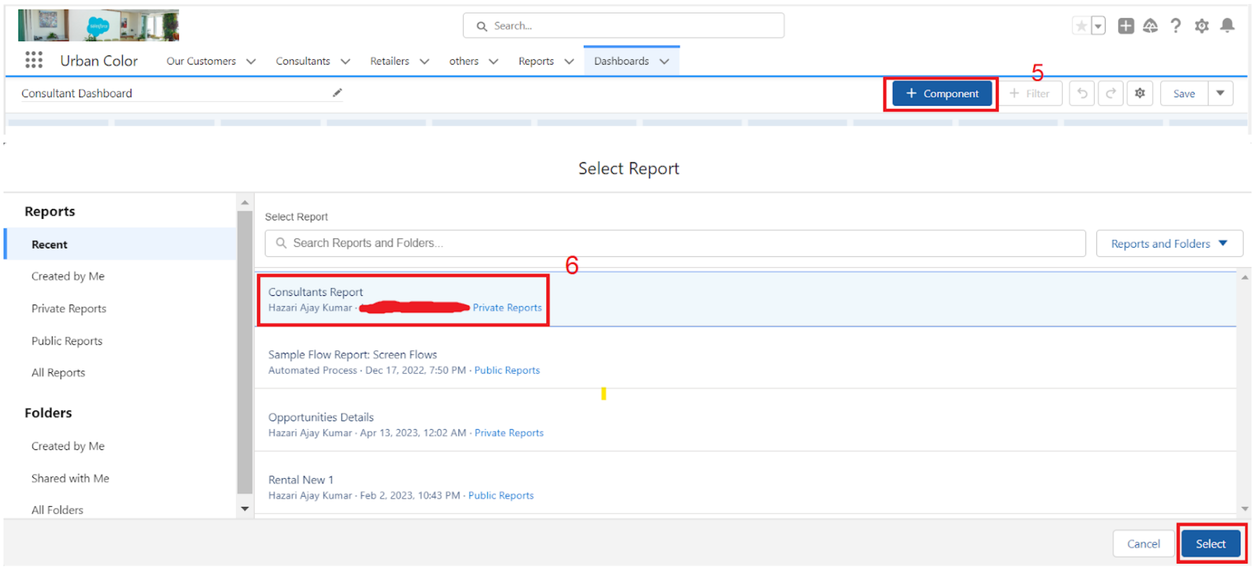
Task 12 : Working with Dashboards

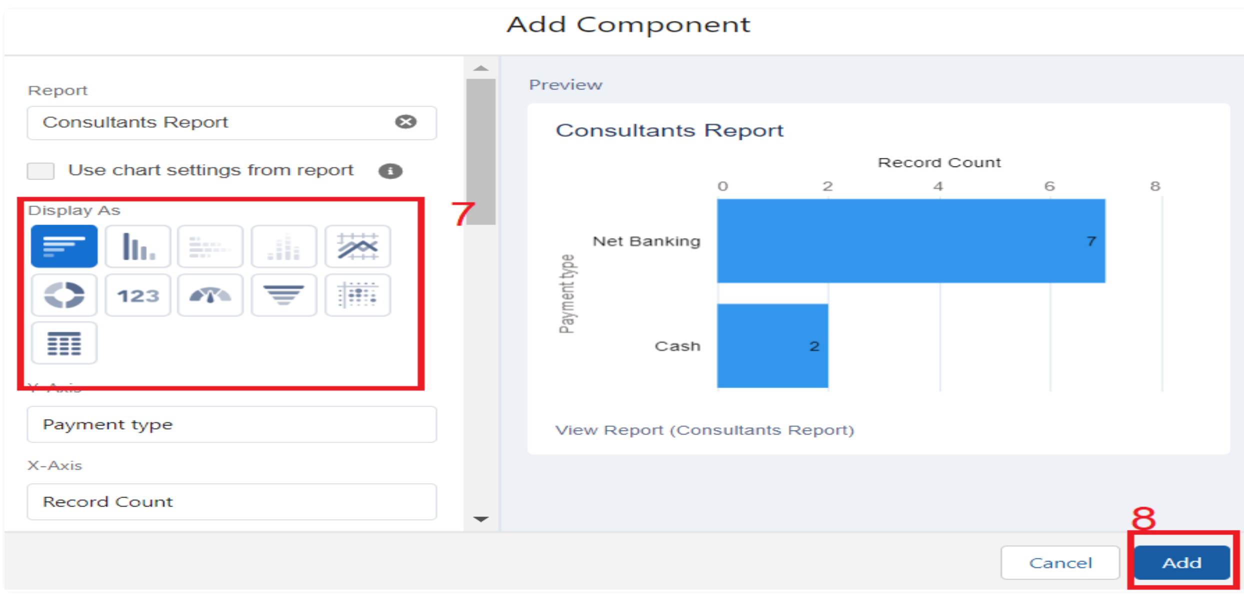
Create Dashboard:

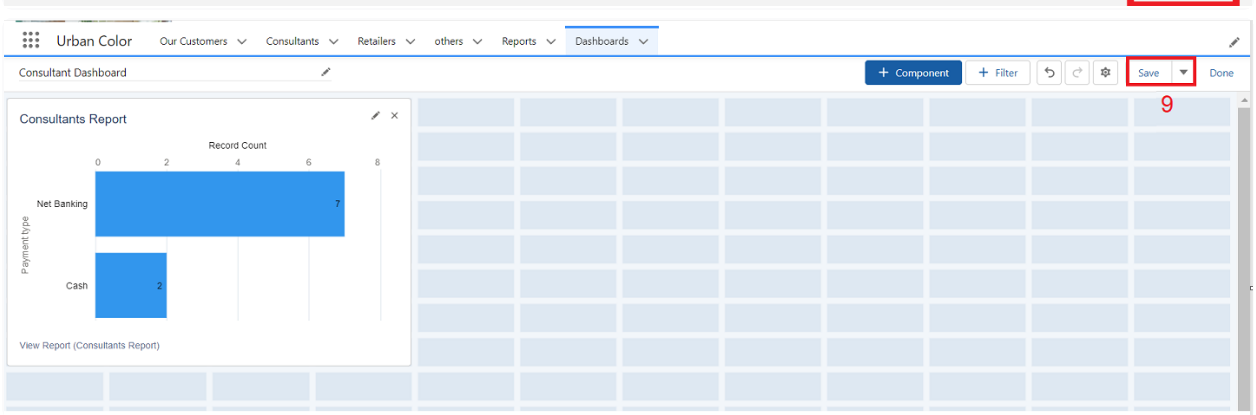
1. Click on the Dashboards tab from the Urban Color application.
2. Click on the new dashboard.
3. Give name- Consultant Dashboard
4. Click create
5. Give your dashboard a name and click on +component
6. Select the Consultants Report which you created.
7. For the data visualization select any of the chart, table etc. as per your choice/requirement.
8. Click add.
9. Click save.






Urban Color
Our Customers
Consultants
Retailers
others
Reports
Dashboards
Consultant Dashboard
+ Component
5
Filter
Save
Select Report
Reports
Recent
Created by Me
Private Reports
Public Reports
All Reports
Folders
Created by Me
Shared with Me
All Folders
Select Report
Search Reports and Folders...
Reports and Folders
6
Consultants Report
Hazari Ajay Kumar · [redacted] · 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
7
123
Y-Axis
Payment type
X-Axis
Record Count
Preview
Consultants Report
Record Count
0 2 4 6 8
Net Banking
7
Cash
2
Payment type
View Report (Consultants Report)
8
Cancel
Add


Urban Color
Our Customers
Consultants
Retailers
others
Reports
Dashboards
Consultant Dashboard
+ Component
+ Filter
Save
Done
9
Consultants Report
Record Count
0 2 4 6 8
Net Banking
7
Cash
2
Payment type
View Report (Consultants Report)

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