

Cosmetics Store Management

Description:

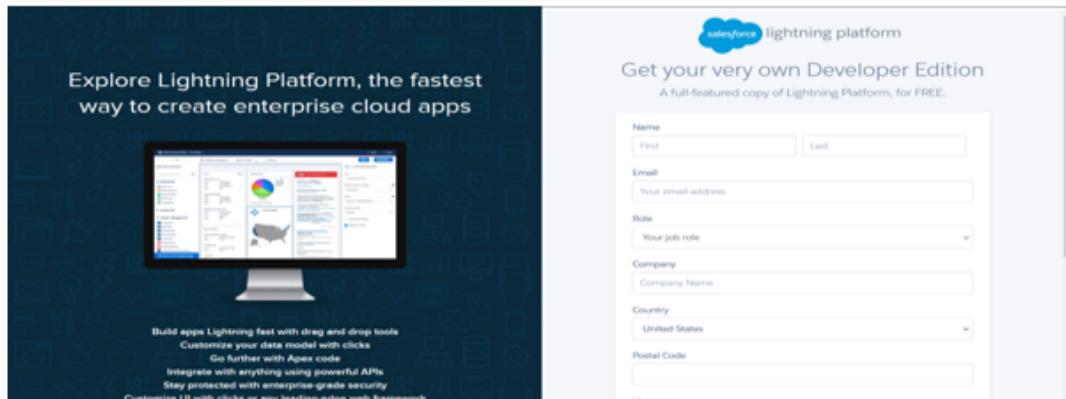
This Cosmetics store management project aims to design and implement a seamless and powerful application for managing and enhancing customer experience along with organization through creation of various objects and reports that helps to organize and boost up the sales of Cosmetic stores. It includes 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 access 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 :

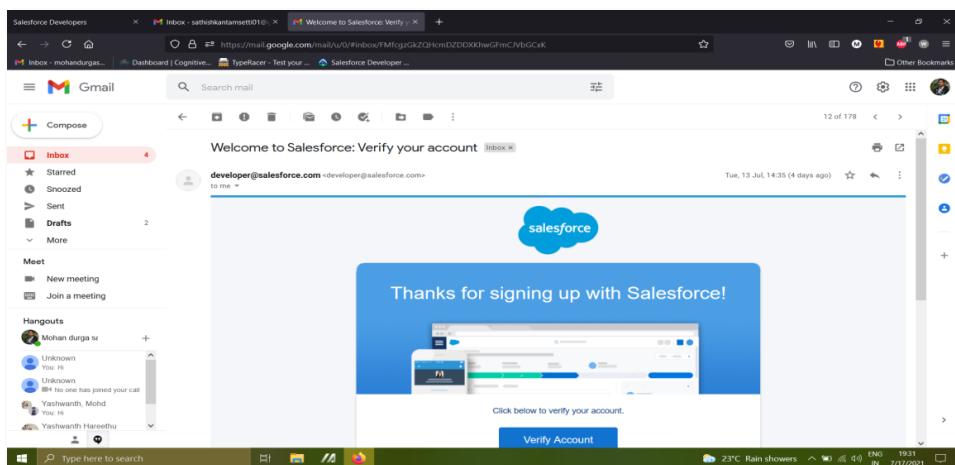
Task 1 : Creation of Salesforce Org

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.

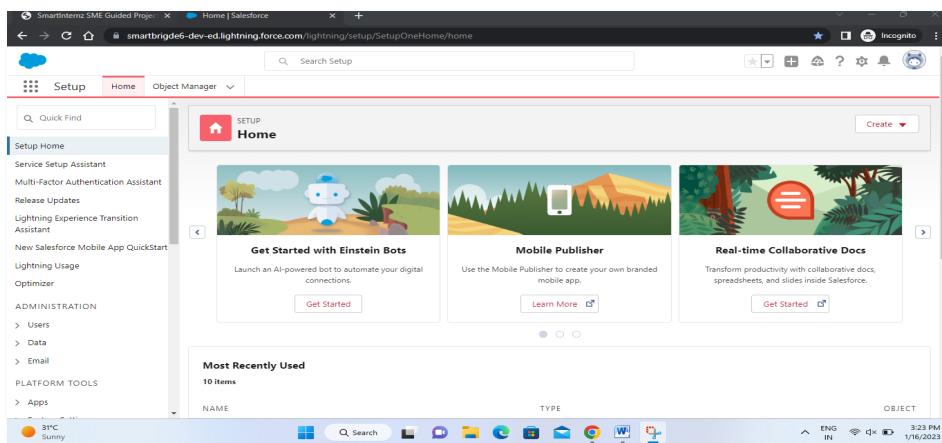


Account Activation: Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins, as



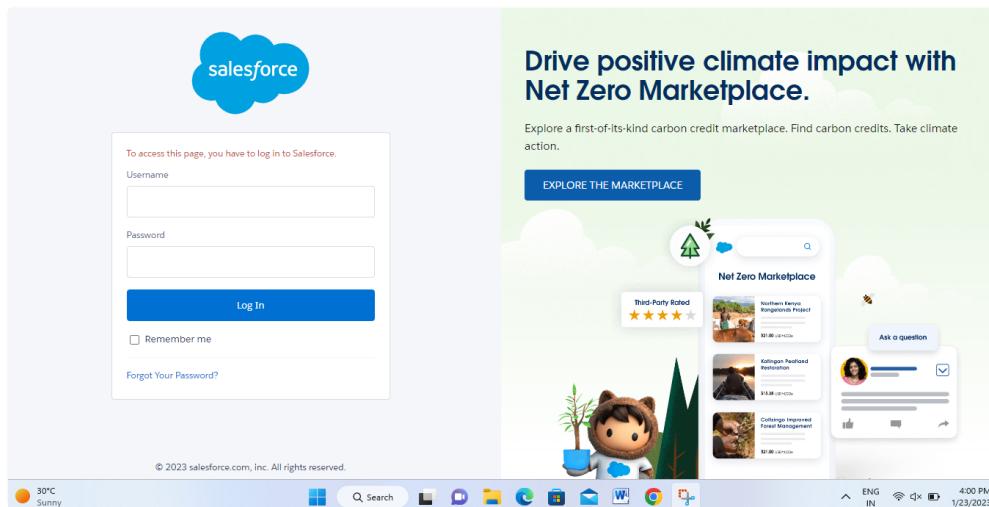
Login To Your Salesforce Account:

Go to [salesforce.com](https://www.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

<https://login.salesforce.com>



Task 2 : Creation of Objects

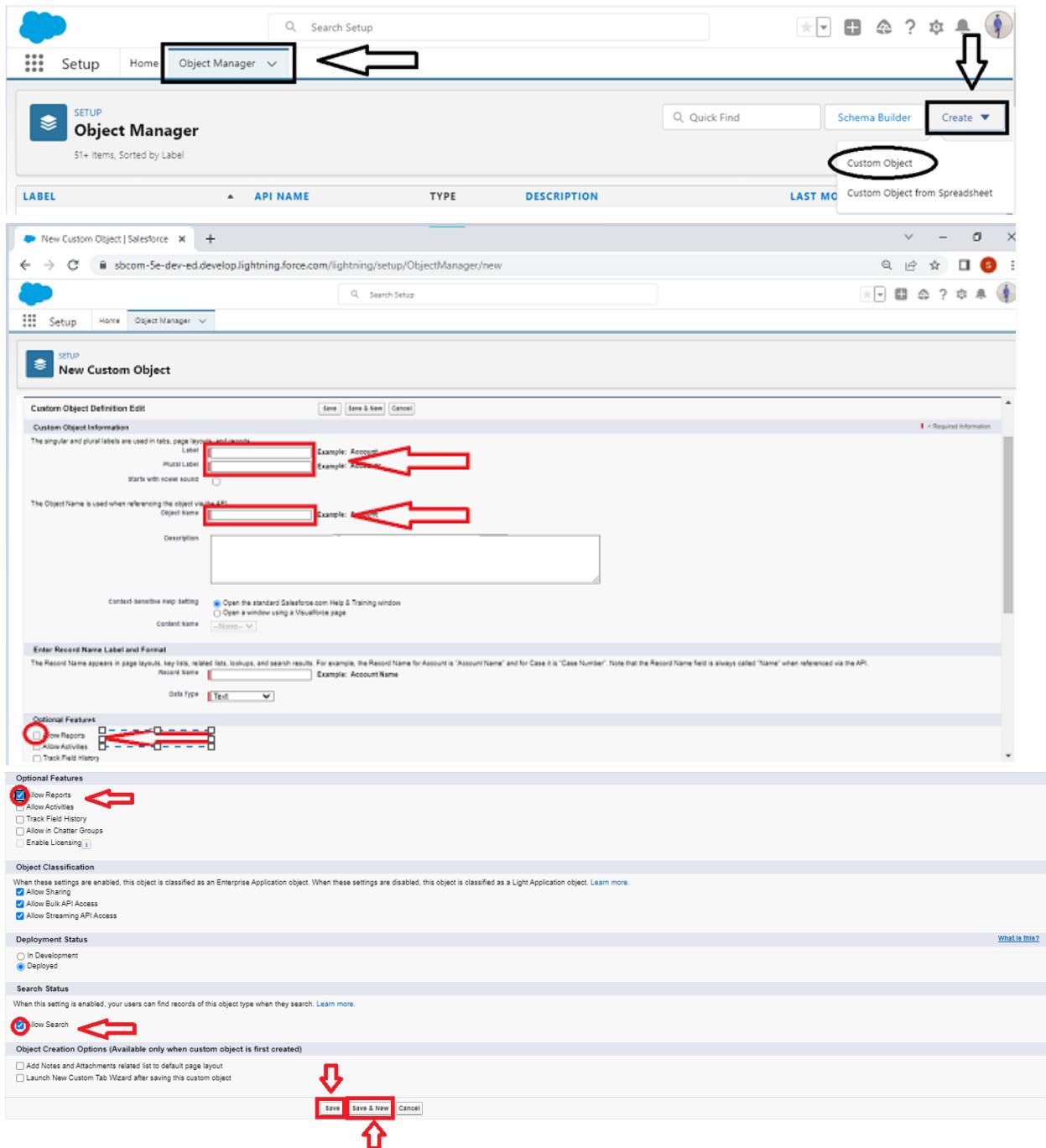
Creation of Objects for Urban Color, For this Urban Color we need to create 3 objects i.e., Our Customers, Consultants, Retailers, others.

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	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)

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.

The screenshot shows the Salesforce Object Manager interface for the 'Consultant' object. On the left, there is a sidebar with various tabs: Details, Fields & Relationships, Page Layouts (which is highlighted with a red box and has a red number '1' next to it), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main area is titled 'Page Layouts' and shows a table with one item: 'Consultant Layout'. The table columns are 'PAGE LAYOUT NAME', 'CREATED BY', and 'MODIFIED BY'. The 'PAGE LAYOUT NAME' column contains 'Consultant Layout'. The 'CREATED BY' column shows 'Hazari Ajay Kumar, 4/1/2023, 7:25 AM'. The 'MODIFIED BY' column shows 'Hazari Ajay Kumar, 6/18/2023, 10:30 PM'. There are also 'Quick Find', 'New', and 'Page Layout Assignment' buttons at the top right of the table. A red number '2' is placed near the bottom center of the table area.

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

Fields

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

Information (Header visible on edit only)

	Value	Owner	Text
Customer id	GEN-2004-001234		
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		

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

Fields

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

Information (Header visible on edit only)

	Value	Owner	Text
Customer id	GEN-2004-001234		
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		

- 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:

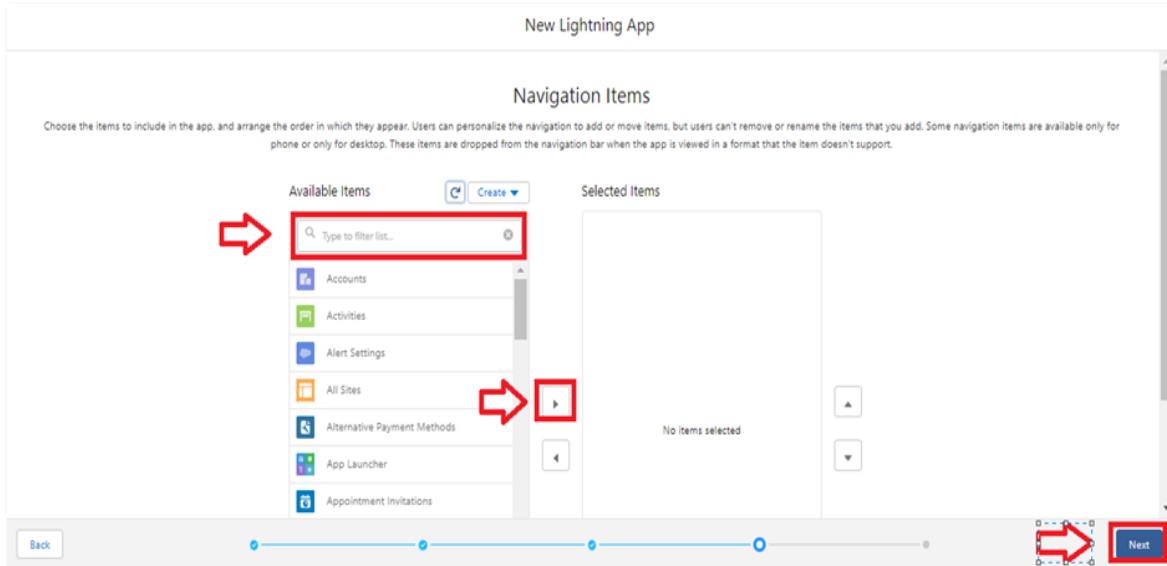
- Go to setup page --> search “app manager” in quick find --> select “app manager” --> click on New lightning App.

The screenshot shows the 'App Manager | Salesforce' interface. At the top, there are tabs for 'Setup', 'Home', and 'Object Manager'. Below the tabs, there are two search bars: one for 'Search Setup' and another for 'Search App'. A red box highlights the 'App Manager' tab. On the left, there's a sidebar with 'Clone (Beta)' and 'Clone (Appx Beta)'. A red arrow points to the 'New Lightning App' button at the top right of the main content area.

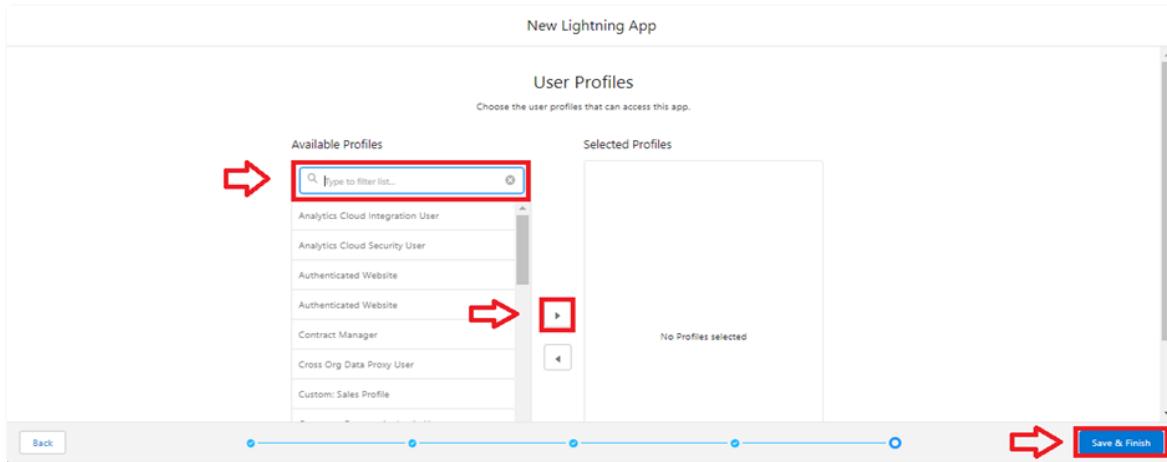
- Fill the app name as Urban Color in app details and branding --> Next --> (App option page) keep it as default --> Next --> (Utility Items) keep it as default --> Next.

The screenshot shows the 'New Lightning App' configuration page. It has two main sections: 'App Details' and 'App Branding'. In the 'App Details' section, the 'App Name' field is highlighted with a red arrow. In the 'App Branding' section, there's a 'Primary Color Hex Value' input field containing '#007002'. At the bottom right, a red arrow points to the 'Next' button.

- 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.

The screenshot shows the Salesforce Setup interface under the Profiles section. A search bar at the top left contains the text "prof". The main area displays a list of profiles categorized into "Service Provider Access" and "Tab Settings". Each profile has checkboxes for various permissions. A tooltip "Urban Color (Urban_Color) Default" points to a checked checkbox for the "Urban Color (Urban_Color)" profile.

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

The screenshot shows the Salesforce Setup interface under the Profiles section. It displays a grid of checkboxes for giving permissions to various objects. The objects listed include Async Operation Results, Back Synchs, Branches, Change Bundles, Change Bundle Installs, Change Submissions, Commercial Vehicles, Consultants, Customers1, Customer Details, Deploy Components, Deployment Results, others, Pipelines, Pipeline Stages, Projects, Properties, Remote Changes, Rentals, Repositories, Retailers, Semesters, and Source Member References. Most checkboxes for these objects are checked, except for some specific ones like "Deploy Components" which are unchecked.

The screenshot shows the Salesforce Setup interface under the Password Policies section. It includes fields for setting password expiration (90 days), history (3 passwords remembered), minimum length (8), complexity (must include alpha and numeric characters), and question requirements (cannot contain password). Other settings include maximum invalid logins (10), lockout period (15 minutes), obscure secret answers, require a minimum 1 day password lifetime, and a note about forgot password links.

4. Click on Save.

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

The image consists of three vertically stacked screenshots from the Salesforce Setup interface:

- Screenshot 1: Clone Profile**
This screenshot shows the "Clone Profile" page. It has a search bar at the top with "prof" entered. Below it, under "Profiles", there is a note: "Didn't find what you're looking for? Try using Global Search." The main area is titled "Clone Profile" and contains the instruction "Enter the name of the new profile." A message "You must select an existing profile to clone from." is displayed above a form. The form includes fields: "Existing Profile" (set to "Standard Platform User"), "User License" (set to "Salesforce Platform"), and "Profile Name" (set to "Billing Operator"). At the bottom are "Save" and "Cancel" buttons.
- Screenshot 2: Profile Edit - Billing Operator**
This screenshot shows the "Profile Edit" page for the "Billing Operator" profile. The title is "Billing Operator". It says "Set the permissions and page layouts for this profile." The "Profile Edit" form has fields: "Name" (set to "Billing Operator"), "User License" (set to "Salesforce"), and "Custom Profile" (checkbox checked). There is also a large "Description" text area which is empty. At the top right are "Save", "Save & New", and "Cancel" buttons.
- Screenshot 3: Profiles - Password Policies**
This screenshot shows the "Password Policies" section of the "Profiles" page. It includes settings for password expiration, history, length, complexity, and other security features. Key settings include:
 - User passwords expire in: 90 days
 - Enforce password history: 3 passwords remembered
 - Minimum password length: 8
 - Password complexity requirement: Must include alpha and numeric characters
 - Password question requirement: Cannot contain password
 - Maximum invalid login attempts: 10
 - Lockout effective period: 15 minutes
 - Obscure secret answer for password resets: (checkbox)
 - Require a minimum 1 day password lifetime: (checkbox)
 - Don't immediately expire links in forgot password emails: (checkbox)
 At the bottom are "Save", "Save & New", and "Cancel" buttons.

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.

The image consists of two screenshots of the Salesforce Setup interface, demonstrating the creation of two new roles: 'Store Head' and 'Billing Operator'.

Screenshot 1: Creating the 'Store Head' Role

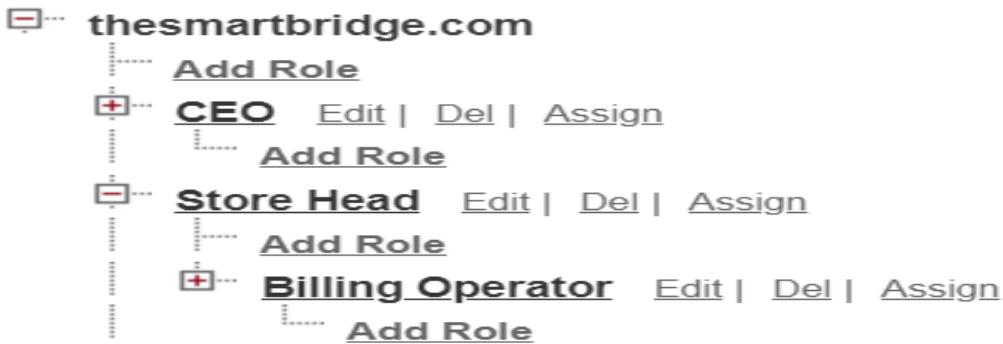
In the top-left corner, the 'Setup' icon is highlighted. The 'Home' tab is selected. In the top-right, there's a 'Object Manager' dropdown. A search bar contains the text 'roles'. On the left sidebar, under 'Users', the 'Roles' section is expanded, showing 'Feature Settings' (Sales and Service), 'Case Teams', and 'Contact Roles on Cases'. The 'Sales' section is currently active. In the main area, a 'SETUP Roles' page is shown with a 'Role Edit' form titled 'New Role'. The 'Label' field is set to 'Store Head', the 'Role Name' field is set to 'Store_Head', and the 'This role reports to' field is set to 'thesmartbridge.com'. The 'Role Name as displayed on reports' field is empty. At the bottom right of the form are 'Save', 'Save & New', and 'Cancel' buttons.

Screenshot 2: Creating the 'Billing Operator' Role

The interface is identical to the first screenshot, but the 'Role Name' field in the 'Role Edit' form is now set to 'Billing_Operator'. The 'This role reports to' field is set to 'Store Head'. The rest of the fields and buttons are the same.

Your Organization's Role Hierarchy

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



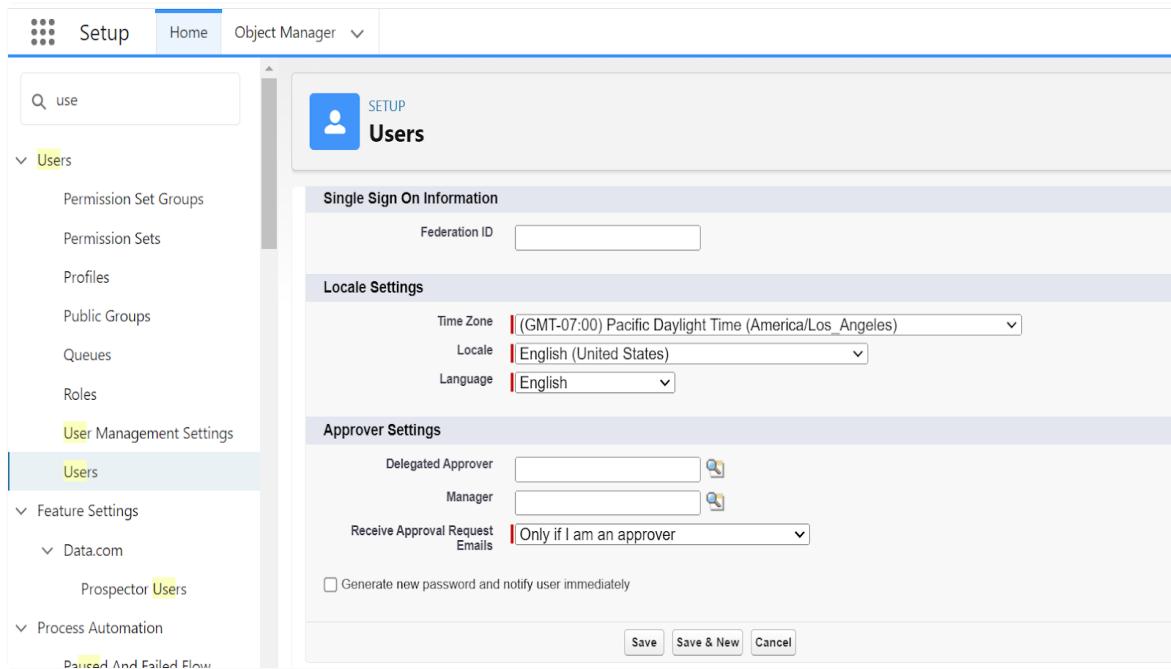
Task 8 : Creation of Users

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.

The screenshot shows the 'User Edit' page in the Salesforce Setup. The left sidebar is collapsed, showing 'Users' is selected under 'User Management Settings'. The main area displays the 'General Information' section of the 'User Edit' form. The fields filled are:

Field	Value
First Name	Amar
Last Name	K
Alias	ak
Email	mailid@gmail.com
Username	amarak2133@salesforce.com
Nickname	User167161323313747430
Title	Store Supervisor
Company	(empty)
Department	(empty)
Division	(empty)
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--



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.

The image displays two screenshots of the Salesforce Setup interface, specifically focusing on User Management.

Screenshot 1: User Edit - General Information

- General Information:**
 - First Name: John
 - Last Name: Teddy
 - Alias: tedd
 - Email: teddyjohn@gmail.com
 - Username: johnneddy@salesforce.com
 - Nickname: User16716029967441831
 - Title: Vehicle Manager
 - Company:
 - Department:
 - Division:
- Role:** Billing Operator
- User License:** Salesforce Platform
- Profile:** Billing Operator
- 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:** 300
- Accessibility Mode (Classic Only):**
- High-Contrast Palette on Charts:**
- Load Lightning Pages While Scrolling:**
- Debug Mode:**
- Make Setup My Default Landing Page:**

Screenshot 2: 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

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

The image consists of three vertically stacked screenshots of the Salesforce Lightning interface, illustrating the process of creating a new customer record.

Screenshot 1: Shows the App Launcher on the left with "Urban Color" selected (marked with red box 1). The search bar at the top contains "urban". The "Apps" section shows "Urban Color" listed (marked with red box 2).

Screenshot 2: Shows the "Our Customers" tab selected (marked with red box 1). The "New" button is highlighted with a red box (marked with red box 2).

Screenshot 3: The "Information" tab is active. The "Customer Name" field is required and highlighted with a red box (marked with red box 1). The "Save" button is highlighted with a red box (marked with red box 2).

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

Urban Color

Our Customers

Recently Viewed

Customer Name

1 Suresh

2 Kamal

Related Details

Customer Name: Suresh

Owner: Hazari Ajay Kumar

Customer id: 5

Phone: 97583873728

Email id: suresh@gmail.com

Address: Hyderabad

Additional Information: 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.

Urban Color

Our Customers

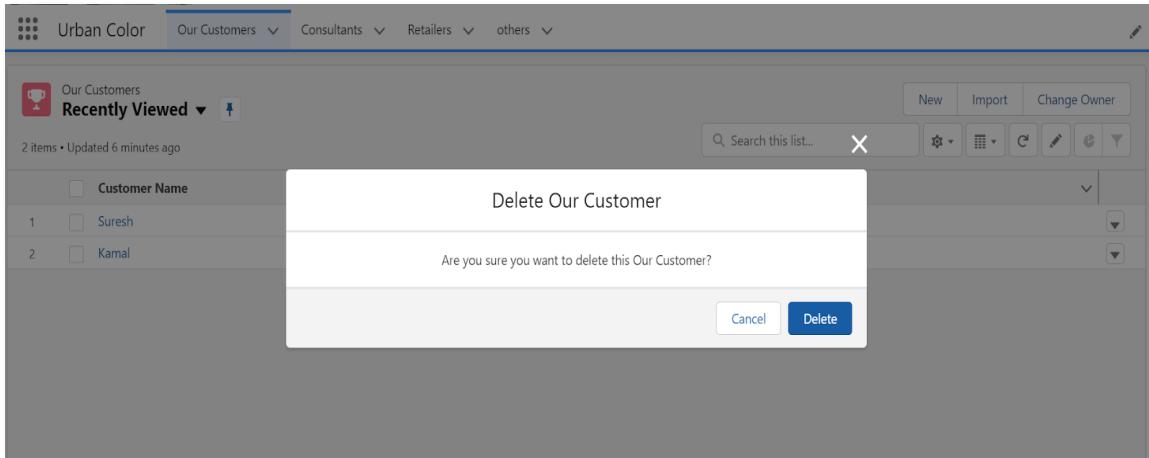
Recently Viewed

Customer Name

1 Suresh

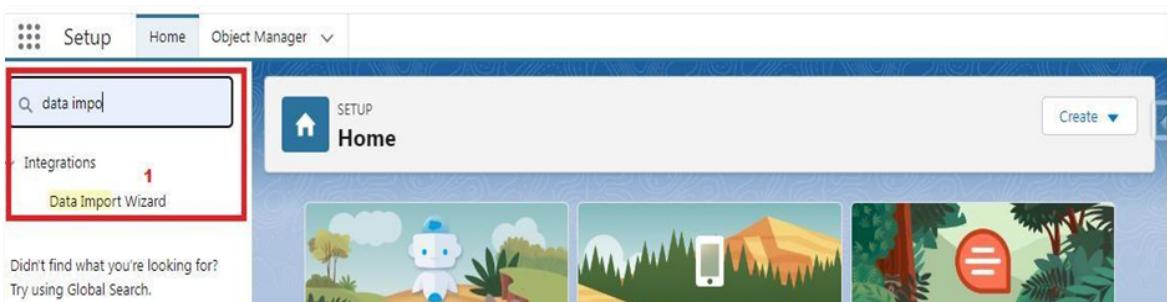
2 Kamal

3 Delete

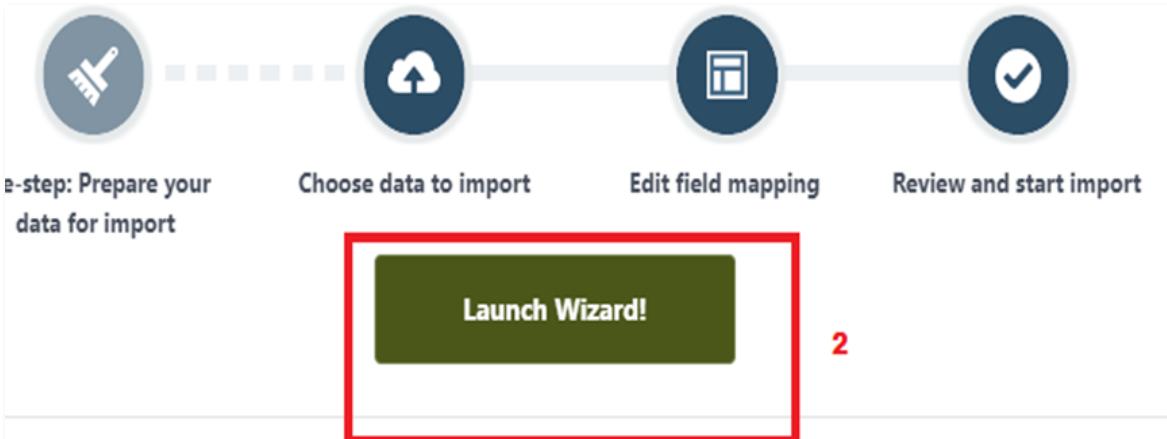


Task 10 : Import Data

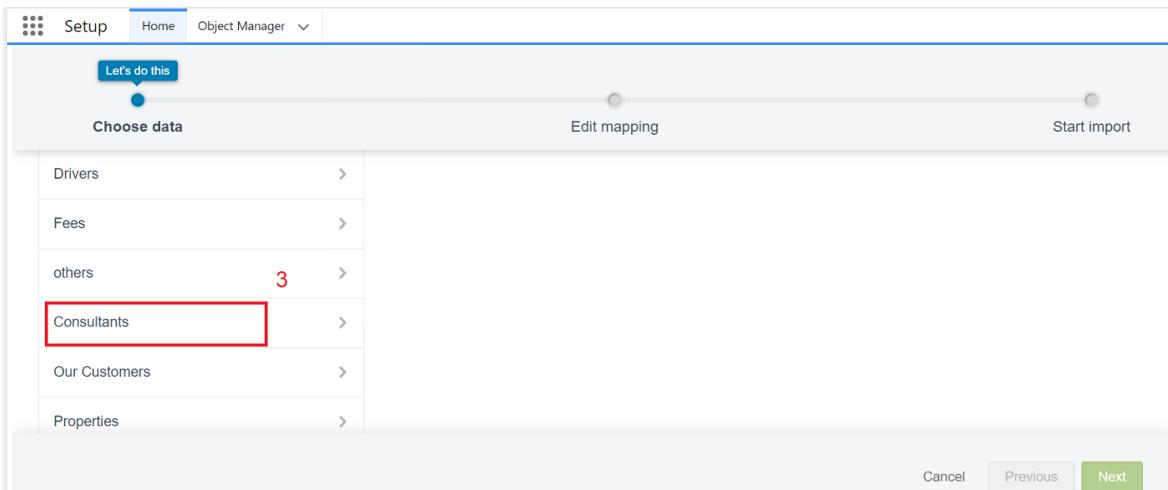
1. From Setup, click the Home tab.
2. In the Quick Find box, enter Data Import and select Data Import Wizard



3. Click Launch Wizard!



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



5. Select Add new records.

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 file Consultant_CSV which we made earlier. Click Next.

Choose data Edit mapping Start import

What kind of data are you importing? [?](#)

Standard objects Custom objects

Attendees >

Buyers >

Customers >

Departments > [5](#)

What do you want to do? [?](#)

Add new records [4](#)

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

Where is your data located? [?](#)

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.

The screenshot shows the 'Edit Field Mapping' step of the Data Import Wizard. At the top, there's a progress bar with 'Almost done' in the center. Below it, a table lists field mappings:

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	

At the bottom right, there are 'Cancel', 'Previous', and a green 'Next' button.

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

The screenshot shows the 'Review & Start Import' step. It displays a summary of the import settings:

- Your selections:** Shows 'Consultants' selected.
- Your import will include:** Shows 7 Mapped fields.
- Your import will not include:** Shows 0 Unmapped fields.

At the bottom right, there are 'Cancel', 'Previous', and a green 'Start Import' button.

9. Click OK on the popup.

The screenshot shows a confirmation message:

Congratulations, your import has started!
Click OK to view your import status on the Bulk Data Load Job page.

A large green 'OK' button is highlighted with a red box.

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

The screenshot shows a table of import batches:

Batches							Records Processed	Records Failed	Retry Count	State Message	Status	
View Request	View Result	Batch ID	Start Time	End Time	Total Processing Time (ms)	API Active Processing Time (ms)	App 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 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.

The screenshot shows the Salesforce Setup Home page. On the left, there's a sidebar with various links like 'Setup', 'Home', 'Object Manager', 'Apps', 'Items', etc. A red box highlights the 'Urban Color' app icon under the 'Apps' section. The main area has three cards: 'Get Started with Einstein Bots', 'Mobile Publisher', and 'Real-time Collaborative Docs'. Below these is a section titled 'Most Recently Used' with a table showing 'Customer Details' as the most recent item. The top navigation bar has tabs for 'Setup', 'Home', 'Object Manager', and a red-highlighted 'Reports' tab.

The screenshot shows the Salesforce Reports page. The top navigation bar includes 'Urban Color', 'Our Customers', 'Consultants', 'Retailers', 'others', 'Reports' (highlighted with a red box), 'Dashboards', and search/filter options. A red box highlights the 'Reports' tab. In the top right, there are buttons for 'Search recent reports...', 'New Report' (highlighted with a red box), 'New Folder', and other options. The main area shows a table of recent reports with columns for 'Report Name', 'Description', 'Folder', 'Created By', 'Created On', and 'Subscribed'.

The screenshot shows the Salesforce Report builder interface for 'New Consultants Report'. On the left, there's a 'Fields' sidebar with 'Groups' (GROUP ROWS) and 'Columns' (with 'Add column...' button). A red box highlights the 'Columns' section. The main area shows a table with columns: 'Consultant: Consultant Name', 'Delivery Type', 'Products', and 'Payment'. The table rows contain data for 9 consultants, including Dev Raj, Ajith, Babu, Chitra, Swathi, Prasad, Ajay Kumar, Shankar, and Sandeep, with details like Self Pickup, Courier, Face Pack, Eye Liner, etc. The top navigation bar includes 'REPORT', 'New Consultants Report', 'Consultants', and various report preview and save buttons.

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

Fields > Groups Columns

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

	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

Update Preview Automatical

Fields > Groups Columns

1 Sort Ascending
2 Sort Descending
3 Group Rows by This Field
4 Group Columns by This Field
5 Bucket This Column
6 Show Unique Count
7 Move Left
8 Move Right
9 Remove Column

Edit Bucket Column

* Field: Payment

* Bucket Name: Payment type

All Values (4)		Search Values
Unbucketed Values (4)		
<input type="checkbox"/> Credit Card	<input type="checkbox"/> Debit Card	BUCKET
<input type="checkbox"/> Upi	<input type="checkbox"/> Cash	

Bucket remaining values as Other

Add Bucket Move To Cancel Apply

Edit Bucket Column

* Field: Payment

* Bucket Name: Payment type

All Values (4)		Search Values
Unbucketed Values (4)		
<input type="checkbox"/> Credit Card	<input type="checkbox"/> Debit Card	BUCKET
<input type="checkbox"/> Upi	<input type="checkbox"/> Cash	

Bucket remaining values as Other

1 Add Bucket 2 Bucket Name Move To Cancel Apply

Edit Bucket Column

* Field: Payment * Bucket Name: Payment type

All Values (4)		Search Values
		VALUE BUCKET
<input checked="" type="checkbox"/> Net Banking (0)		<input type="checkbox"/> Credit Card
<input checked="" type="checkbox"/> Cash (0)		<input type="checkbox"/> Debit Card
		<input type="checkbox"/> Upi
		<input type="checkbox"/> Cash

Unbucketed Values (4)

Bucket remaining values as Other

Add Bucket Move To ▾

Cancel Apply

Edit Bucket Column

* Field: Payment * Bucket Name: Payment type

All Values (4)		Search Values
		VALUE BUCKET
<input checked="" type="checkbox"/> Net Banking (0)		<input checked="" type="checkbox"/> Credit Card
<input checked="" type="checkbox"/> Cash (0)		<input checked="" type="checkbox"/> Debit Card
		<input checked="" type="checkbox"/> Upi
		<input type="checkbox"/> Cash

Unbucketed Values (4)

Bucket remaining values as Other

Add Bucket Move To ▾

Edit Bucket Column

* Field: Payment * Bucket Name: Payment type

All Values (4)		Search Values
		VALUE BUCKET
<input checked="" type="checkbox"/> Net Banking (0)		<input checked="" type="checkbox"/> Credit Card
<input checked="" type="checkbox"/> Cash (0)		<input checked="" type="checkbox"/> Debit Card
		Cash
		Unbucketed Values
		New Bucket

Unbucketed Values (4)

Bucket remaining values as Other

Add Bucket Move To ▾

Cancel Apply

Edit Bucket Column

* Field Payment	* Bucket Name Payment type										
All Values (4) Net Banking (3) Cash (0) Unbucketed Values (1)	Search Values <table border="1"> <thead> <tr> <th>VALUE</th> <th>BUCKET</th> </tr> </thead> <tbody> <tr> <td>Credit Card</td> <td>Net Banking</td> </tr> <tr> <td>Debit Card</td> <td>Net Banking</td> </tr> <tr> <td>Upi</td> <td>Net Banking</td> </tr> <tr> <td><input checked="" type="checkbox"/> Cash</td> <td><input checked="" type="checkbox"/> Cash</td> </tr> </tbody> </table>	VALUE	BUCKET	Credit Card	Net Banking	Debit Card	Net Banking	Upi	Net Banking	<input checked="" type="checkbox"/> Cash	<input checked="" type="checkbox"/> Cash
VALUE	BUCKET										
Credit Card	Net Banking										
Debit Card	Net Banking										
Upi	Net Banking										
<input checked="" type="checkbox"/> Cash	<input checked="" type="checkbox"/> Cash										
<input type="checkbox"/> Bucket remaining values as Other <input type="button" value="Add Bucket"/> <input type="button" value="Move To"/>											
<input type="button" value="Cancel"/> <input type="button" value="Apply"/>											

Edit Bucket Column

* Field Payment	* Bucket Name Payment type				
All Values (4) Net Banking (3) <input checked="" type="checkbox"/> Cash (1) Unbucketed Values (0)	Search Values <table border="1"> <thead> <tr> <th>VALUE</th> <th>BUCKET</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/> Cash</td> <td><input checked="" type="checkbox"/> Cash</td> </tr> </tbody> </table>	VALUE	BUCKET	<input checked="" type="checkbox"/> Cash	<input checked="" type="checkbox"/> Cash
VALUE	BUCKET				
<input checked="" type="checkbox"/> Cash	<input checked="" type="checkbox"/> Cash				
<input type="checkbox"/> Bucket remaining values as Other <input type="button" value="Add Bucket"/> <input type="button" value="Move To"/>					
<input type="button" value="Cancel"/> <input type="button" value="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

REPORT ▾
New Consultants Report

Fields	Groups	Columns	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

Save Report

1. Report Name: Consultants Report (highlighted by a red box)

Report Unique Name: Consultants_Report_hvb

Report Description:

2. Folder: Private Reports (highlighted by a red box)

3. Save button (highlighted by a red box)

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

Recent							
REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed	
Recent	Consultants Report	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Private Reports	Hazari Ajay Kumar	12/17/2022, 7:50 PM		
Created by Me	Sample Flow Report: Screen Flows	Public Reports	Automated Process				
Private Reports	Opportunities Details	Private Reports	Hazari Ajay Kumar	4/12/2023, 11:46 PM			
Public Reports	Rental New 1	Public Reports	Hazari Ajay Kumar	2/2/2023, 10:39 PM			
All Reports							
FOLDERS							
All Folders							
Created by Me							
Shared with Me							
FAVORITES							
All Favorites							

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.

Recent							
DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed	

New Dashboard

* Name
Consultant Dashboard

Description

Folder
Private Dashboards Select Folder

Cancel Create

Urban Color Consultant Dashboard

5 + Component

Select Report

6

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...

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

7

Display As

8

Payment type

X-Axis

Record Count

Preview

Consultants Report

Record Count

Payment type	Record Count
Net Banking	7
Cash	2

View Report (Consultants Report)

Cancel Add

Urban Color Consultant Dashboard

+ Component + Filter Save Done

9

Consultants Report

Record Count

Payment type	Record Count
Net Banking	7
Cash	2

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

The screenshot shows the Salesforce App Launcher interface. A red box labeled '1' highlights the 'Setup' icon at the top left. A red box labeled '2' highlights the search bar where 'Urban Color' has been typed. The sidebar on the left lists various categories like Setup, Home, Object Manager, Apps, Items, etc. The main area displays three cards: 'Get Started with Einstein Bots', 'Mobile Publisher', and 'Real-time Collaborative Docs'. Below these is a section titled 'Most Recently Used' with a table showing 'Customer Details' as the most recent item. At the bottom, there's a navigation bar with tabs for Dashboards, Reports, and others, with 'Dashboards' highlighted by a red box labeled '3'. The main content area shows a list of dashboards under the 'Recent' tab, with 'Consultant Dashboard' highlighted by a red box labeled '4'.

Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Consultant Dashboard		Private Dashboards	Hazari Ajay Kumar	6/20/2023, 10:46 PM	
Opportunities Details		Private Dashboards	Hazari Ajay Kumar	4/12/2023, 11:57 PM	
Opportunity details		Private Dashboards	Hazari Ajay Kumar	4/12/2023, 11:48 PM	

