

Cosmetic Store Management

Description :

Cosmetics Store Management in Salesforce is a solution that helps cosmetic 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 Catalogue:** Maintain an up-to-date catalogue 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 analyse 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:

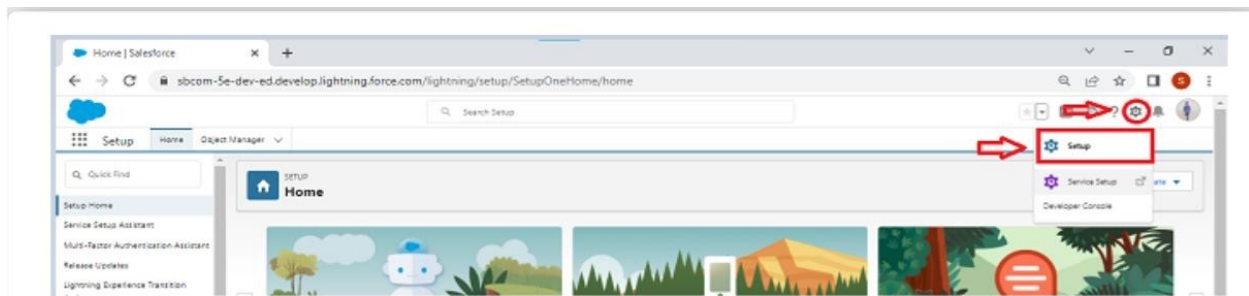
Creation of Objects for Urban Colour,For this Urban Colour, we need to create 3 objects i.e .,Our Customers,Consultants,Retailers,others.

The below steps will assist you in creating those objects.

1. Click on the gear icon and then selectSetup.
2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a CreateDropdown click on that and select Custom Object.
4. Creation of Our CustomerObject

On the CustomObject Definition page, create the object as follows:

1. Label: Our Customer
2. Plural Label: Our Customers
3. Record Name: Our Customer
4. Check the Allow Reports check box
5. Check the Allow Search checkbox
6. ClickSave.
7. Now create a custom tab. Click the Home tab, enter Tabs in QuickFind and select Tabs.
8. UnderCustom Object Tabs, click New.
9. ForObject, select Our Customer.
- 10.ForTab Style, select any icon.
- 11.Leave all defaults as is. ClickNext, Next, and Save.



We need to create 4 objects named Our customer, Consultant, Retailer, Others.
For creating the other 3 objects, we need to follow the same procedure

as mentioned above. After the completion of the object creation task,

We'll move on to further steps.

Task2 : Creating Fields and Relationship :

1. 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:

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 Retailersobjects

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)

Fields in Others objects

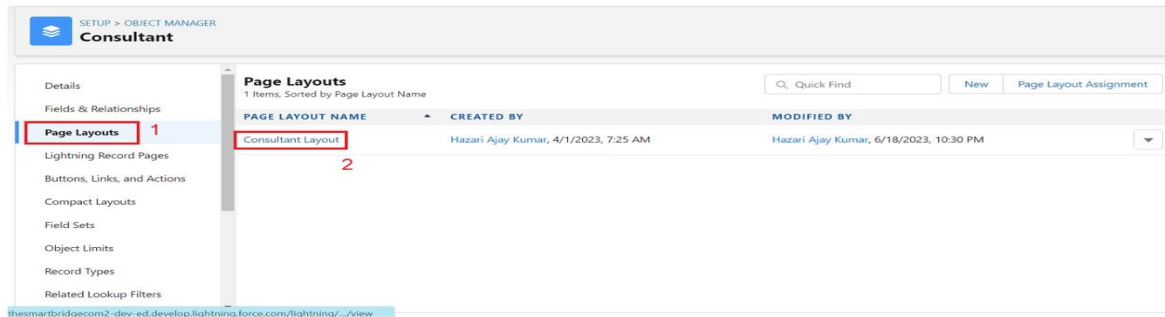
Fields in Other objects follow below data types:

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

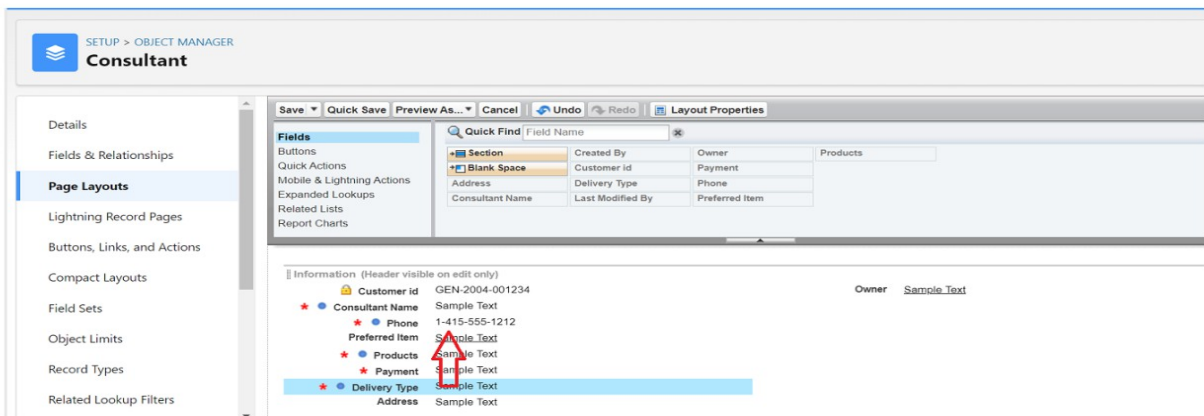
In the CosmeticStore Management System built onSalesforce, fields and relationships are designed to streamline operations and enhance data management. Key fields include customer details (e.g., contact information and purchase history), product specifics (e.g., SKU, price, and inventory levels), order 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.

Task 3: Page Layout creation:

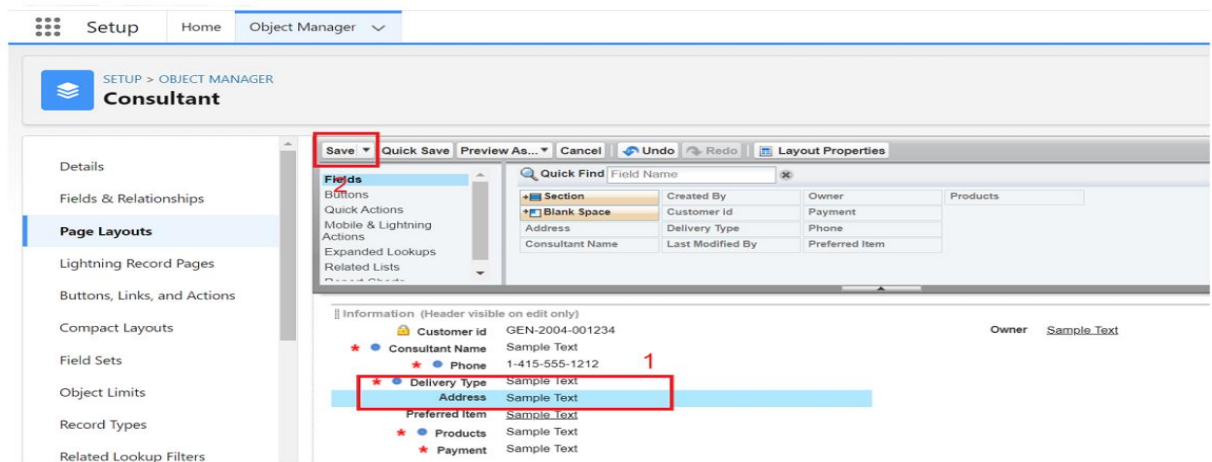
1. From the Salesforce setup menu, go to "Object Manager" and select the Consultants object.
2. Click on "Page Layouts" in the left sidebar. This will display a list of available page layouts for the selected object.
3. Select the Consultant Layout page layout.



4. Click And Drag Deliverytype and AddressFields Below Phone field.



5. Click on Save



Creating a page layout in Salesforce involves navigating to the object manager, selecting the relevant

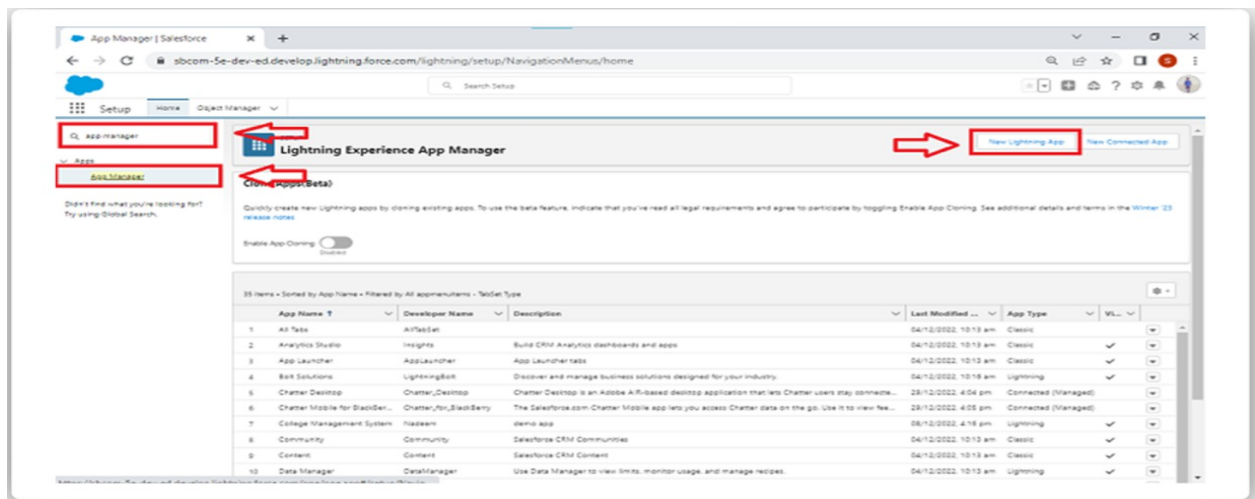
object, and either creating a new layout or editing an existing one. You can design the layout by dragging and dropping fields, adding sections and related lists, and including buttons or links as needed. Customize field properties and section settings to suit user needs, then save and assign the layout to specific profiles or record types. Finally, preview and test the layout to ensure it is functional and meets user requirements.

Task 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.



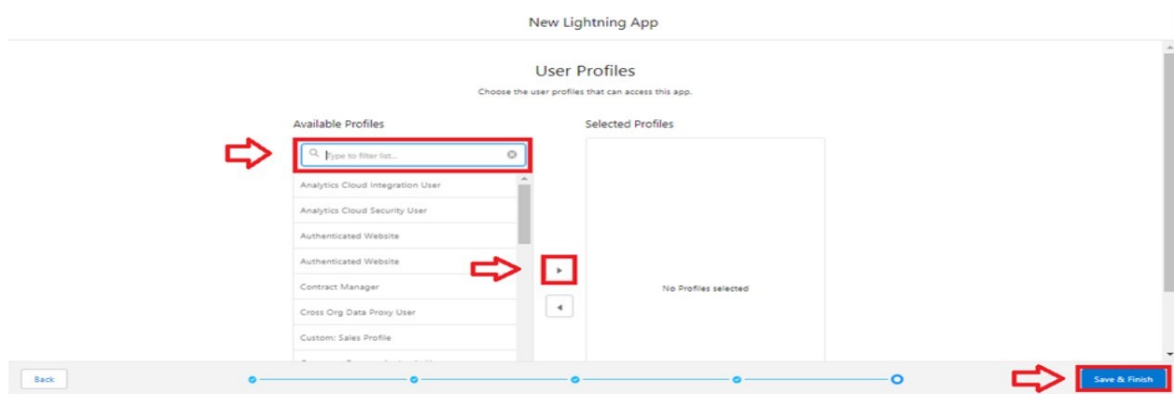
2. Fill the app name as Urban Colour in app details and branding -->Next --> (App option page) keep it as default--> Next -

-> (UtilityItems) keep it as default--> Next.

3. ToAdd Navigation Items:

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

5. ToAdd User Profiles:



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

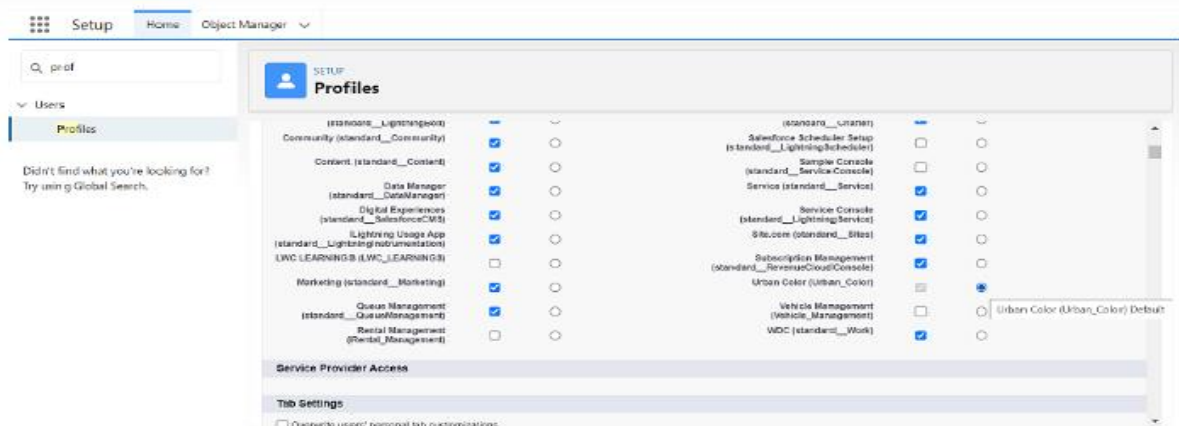
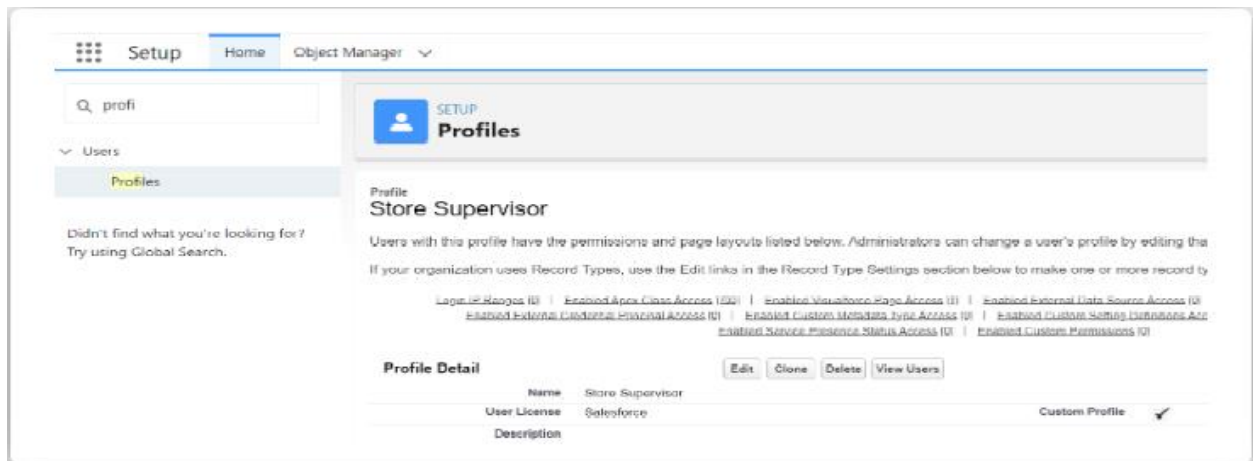
► **Task 5: Creating Profiles:**

- a. 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, Visual force page access, Page layouts, Record Types, Login hours & Login IP ranges.

Creating 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.

- b. From Setup enter Profiles in the Quick Find box, and selectProfiles.
 - c. From the list of profiles, find Standard User.
 - d. ClickClone.
 - e. ForProfile Name, enterStore Supervisor.
 - f. ClickSave.
 - g. While still on the Store Supervisor profile page, then click Edit.
 - h. 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.
 - i. Scroll down to Custom App Settings and give access for Urban Colour. 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 ,CloneSalesforce Platform user and give access only for BillingOperator.

Task 6: Setting up Roles :

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

->Click on the Gear Icon
 >Click "Setup"
 >In the Quick Find box, enter "Roles"
 >Click "Roles"
 >Click on "Set Up Roles"
 >Click "Expand All"
 >Under the CEO, click on "Add Role"
 >Fill up the Label as Store Head, Role Name Store_Head.

>Enter a Role name that will be displayed on Reports.

The first screenshot shows the Salesforce Setup interface with the 'Roles' section selected in the left sidebar. The 'New Role' form is displayed, showing fields for 'Label' (Store Head), 'Role Name' (Store Head), 'This role reports to' (thesmartbridge.com), and 'Role Name as displayed on reports'. The 'Save' button is highlighted.

The second screenshot shows the same 'New Role' form, but with the 'Role Name' field set to 'Billing Operator' and 'This role reports to' set to 'Store Head'. The 'Save' button is highlighted.

The third screenshot shows the 'Your Organization's Role Hierarchy' diagram. The hierarchy is as follows:

- thesmartbridge.com
 - Add Role
 - CEO Edit | Del | Assign
 - Add Role
 - Store Head Edit | Del | Assign
 - Add Role
 - Billing Operator Edit | Del | Assign
 - Add Role

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 License As Salesforce.
6. Select a profile as Store Supervisor.
7. Check Generate new password and notify the user immediately to have the user's login name and a temporary password emailed to your email.

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

Setup Home Object Manager

use

Users

Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
Process Automation
Paused And Failed Flow

SETUP Users

User Edit Save Save & New Cancel

General Information

First Name Amar
Last Name k
Alias ak
Email mailid@gmail.com
Username amark2133@salesforce.cor
Nickname User167161323313747430
Title Store Supervisor
Company
Department
Division

Role Store Head
User License Salesforce
Profile Store Supervisor
Active ☒
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

use

Users

Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
Process Automation
Paused And Failed Flow

SETUP Users

Single Sign On Information

Federation ID

Locale Settings

Time Zone (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:

Navigate to the ObjectTab:

- >Log in to Salesforce and go to the relevant object tab (e.g., Accounts,Contacts, Opportunities).
- >Click "New":
- >On the object's home page or list view, click the "New" button to initiate the creation of a new record.
- >Enter RecordInformation:

>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.

>Save the Record:

>Once all necessary information is entered, click “Save” to create and store the new record in Salesforce.

Steps to Modify Record:

Find the Record:

>Locate the record you want to modify by using the object’s list view, search function, or related lists.

>Open the Record:

>Click on the record’s name to open it and view its details.

>Click “Edit”:

In the record’s detail view, click the “Edit”button to enable editing mode.

Update RecordInformation:

Make the necessary changes to the fields as required. Ensure all required fields are correctly filled out.

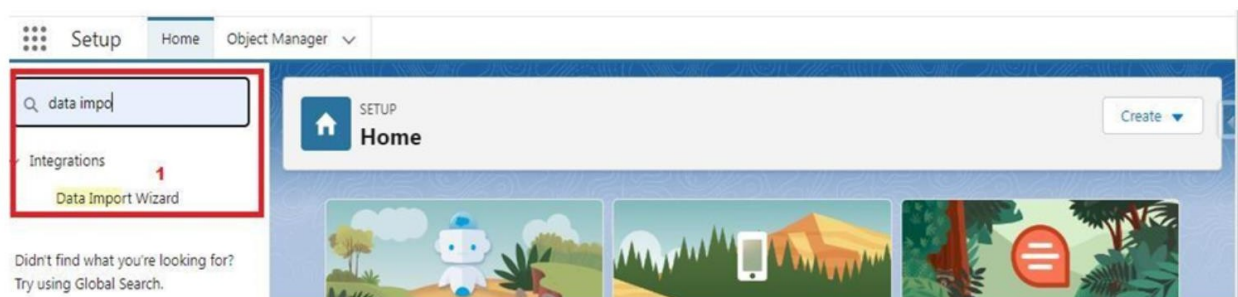
Save the Changes:After making the updates,click “Save” to apply and store the modifications.

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

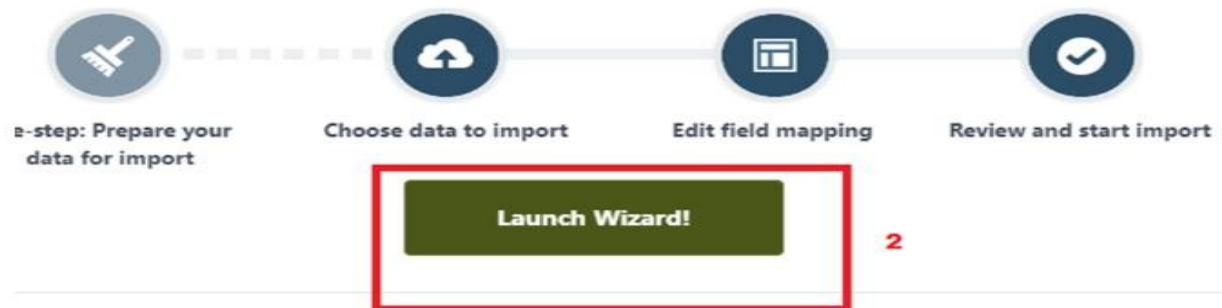
► Task 9: Importing Data :

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. ClickLaunch 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.

Choose data

Edit mapping

Start import

What kind of data are you importing?

Standard objects Custom objects

Attendees

Buyers

Customers

Departments

What do you want to do?

Add new records

Match by: --None--

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

Trigger workflow rules and processes?

Where is your data located?

Drag CSV file here to upload

CSV

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

Choose data

Edit mapping

Start import

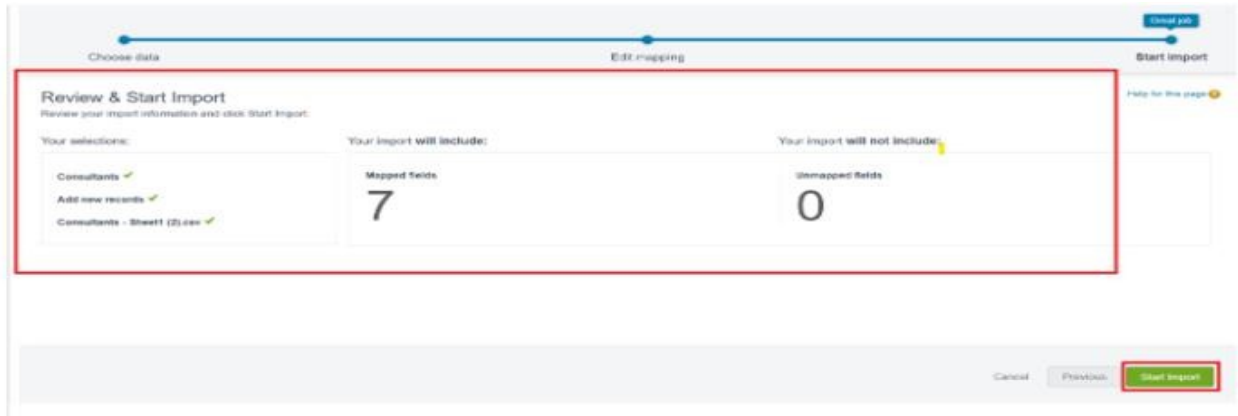
Edit Field Mapping: Consultants

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	Apb	Bbiv
Change	Mobile Number	Mobile Number	984036732	78403673	90203673
Change	Delivery Type	Delivery Type	Self Pickup	Counter	Self Pickup
Change	Address	Address		Hyderabad	
Change	Products	Products	Lipstick	Compact	Face Pack
Change	Payment	Payment	Cash	Upi	Credit Card
Change	Email	Email	apb@gsat.com	bbiv@gsat.com	

Cancel Previous **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.

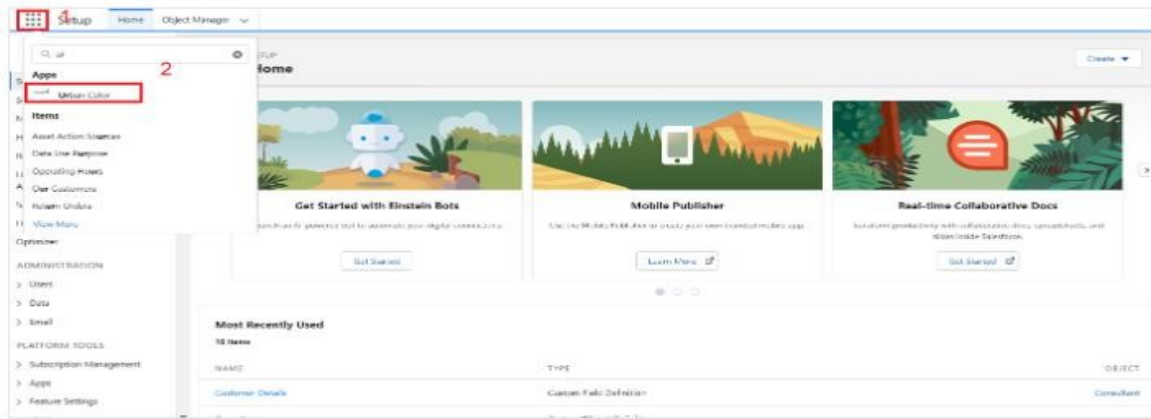
11. Make sure you have 0 records under the records failed column.

Note - Do Field mapping carefully.

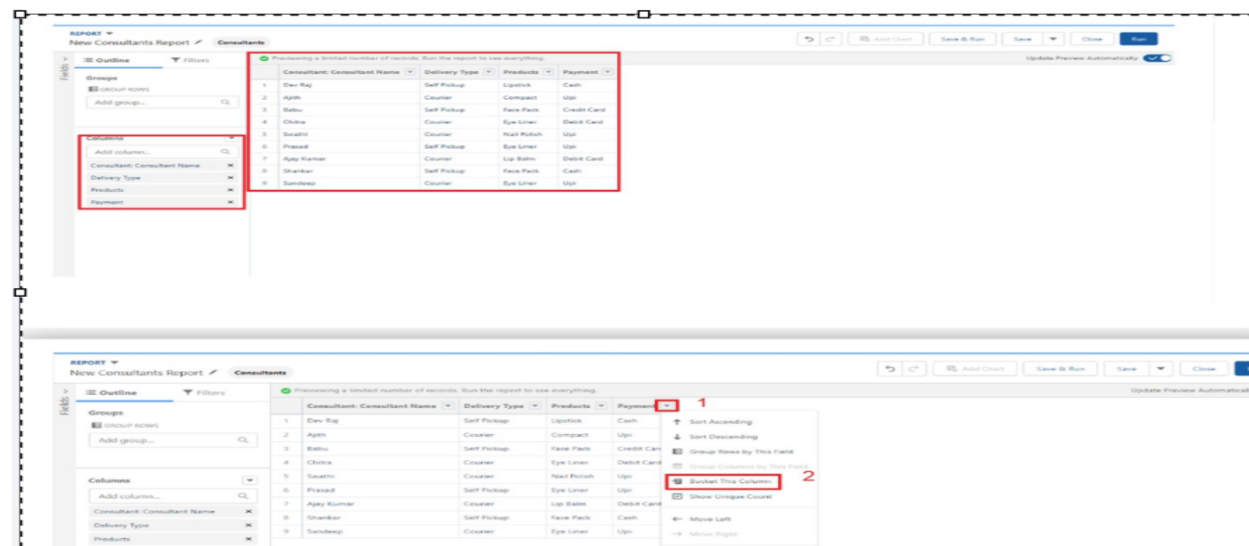
► Task 10 :Accessing Reports :

Creating Report :

- >Click App Launcher
- >Select UrbanColor App
- >Click the reports tab
- >Click New Report.
- >Click the report type as Consultants Click Start report.
- >Customize your report; in Columns select- ConsultantName,Delivery type,Products,Payment.
- >Click on the drop down option on the payment column and selectBucket this column.
- >Bucket Name as Payment type
 - >Click on Add Bucket and name it as NetBanking
 - >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 selectCash and Move to Cash.



Click on Apply



Edit Bucket Column

* Field

Payment



* Bucket Name

Payment type

All Values (4)

Search Values



Unbucketed Values (4)



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

Unbucketed Values (4)

Search Values

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

☐ Bucket remaining values as Other

Add Bucket

Move To

Cancel

Apply

Edit Bucket Column

* Field
Payment

* Bucket Name
Payment type

All Values (4)

Net Banking (0)

Cash (0)

Unbucketed Values (4)

Search Values

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

☐ Bucket remaining values as Other

Add Bucket

Move To

Cancel

Apply

Edit Bucket Column

* Field
Payment

* Bucket Name
Payment type

All Values (4)

Net Banking (0)

Cash (0)

Unbucketed Values (4)

Search Values

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

☐ Bucket remaining values as Other

Add Bucket

Move To

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

Search Values
🔍

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

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)

☐ Bucket remaining values as Other

Search Values
🔍

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

Add Bucket

Move To
▼

Cancel

Apply

- >In Group Rows, Add Payment Type Bucket Field.
- >Click refresh
- >Click Save and Run
- >Give report name – Consultant report
- >Click Save

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_Urb

Report Description

2

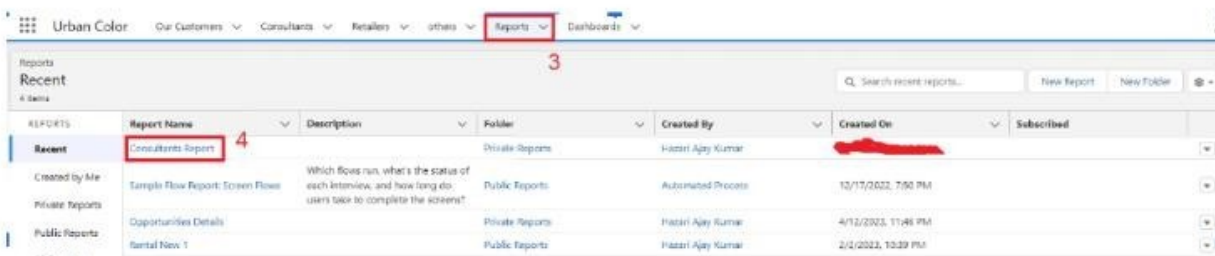
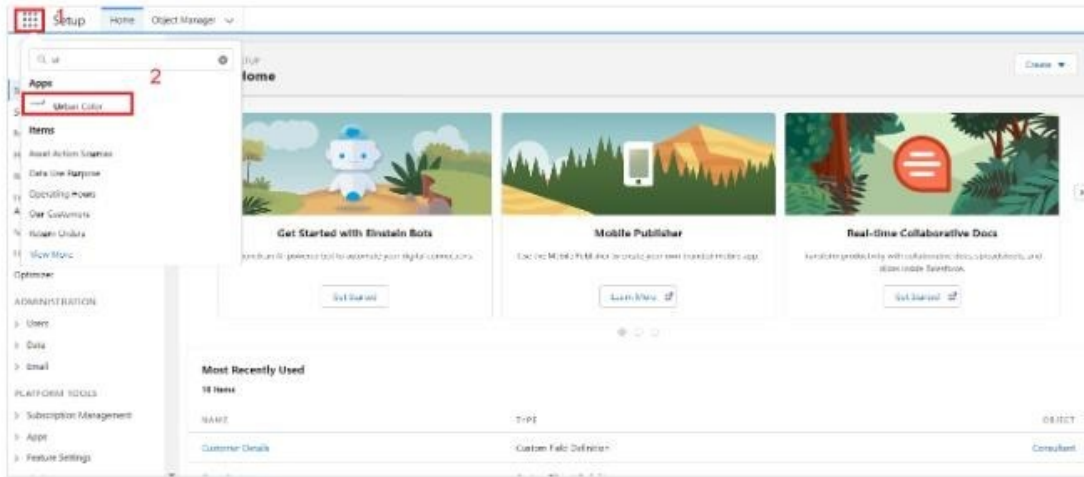
Folder
Private Reports

3

Cancel Save

View Reports:

- >Click on App Launcher on the left side of the screen.
- >Search Urban Colour App & click on it.
- >Click on the Reports Tab.
- >Click on Urban Colour Report and see records.



► **Task 11 : Working with dashboards :**

Create Dashboard :

1. Click on the Dashboards tab from the Urban Colour 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

Dashboard Recent 2 items

Search recent dashboards... New Dashboard New Folder

Subscribed

New Dashboard

Name **3**

Consultant Dashboard

Description

Folder

Private Dashboards Select Folder

Cancel Create **4**

Urban Color | Our Customers | Consultants | Retailers | others | Reports | Dashboards

Consultant Dashboard

+ Component **5**

Select Report

Select Report

Search Reports and Folders

Reports and Folders

Recent

Created by Me

Private Reports

Public Reports

All Reports

Folders

Created by Me

Shared with Me

All Folders

Consultants Report
Hiten Ajay Kumar Private Reports **6**

Sample Hire Report Screen Flow
Automated Process - Dec 17, 2022, 7:30 PM - Public Reports

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

Rental Item 1
Hiten 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**

Payment type

X-Axis

Record Count

Preview

Consultants Report

Record Count

0 2 4 6 8

Net Banking 7

Cash 2

View Report (Consultants Report)

Cancel Add **8**

