BeautySphere - A Cosmetics Store Management Platform

Developed by

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ABSTRACT

BeautySphere is a comprehensive Cosmetics Store Management platform designed to streamline store operations, enhance customer experience, and optimize inventory management within the cosmetics retail sector. By integrating a wide range of functionalities such as product management, sales tracking, customer relationship management (CRM), and analytics, BeautySphere enables cosmetics retailers to improve efficiency and effectiveness across all business areas.

The platform empowers store owners to manage inventory effectively, track sales trends, and maintain customer records seamlessly. By implementing an intuitive and user-friendly interface, BeautySphere facilitates easy navigation for both staff and customers, significantly improving operational efficiency and service quality.

Additionally, BeautySphere leverages advanced data analytics, providing real-time insights that support data-driven decision-making, personalized marketing strategies, and enhanced customer satisfaction. Built on a scalable architecture, the platform supports the future growth of businesses by offering tools that streamline customer engagement and optimize sales and inventory management.

In a competitive market, BeautySphere serves as an indispensable solution for cosmetics retailers looking to thrive by delivering an exceptional shopping experience while ensuring operational excellence.

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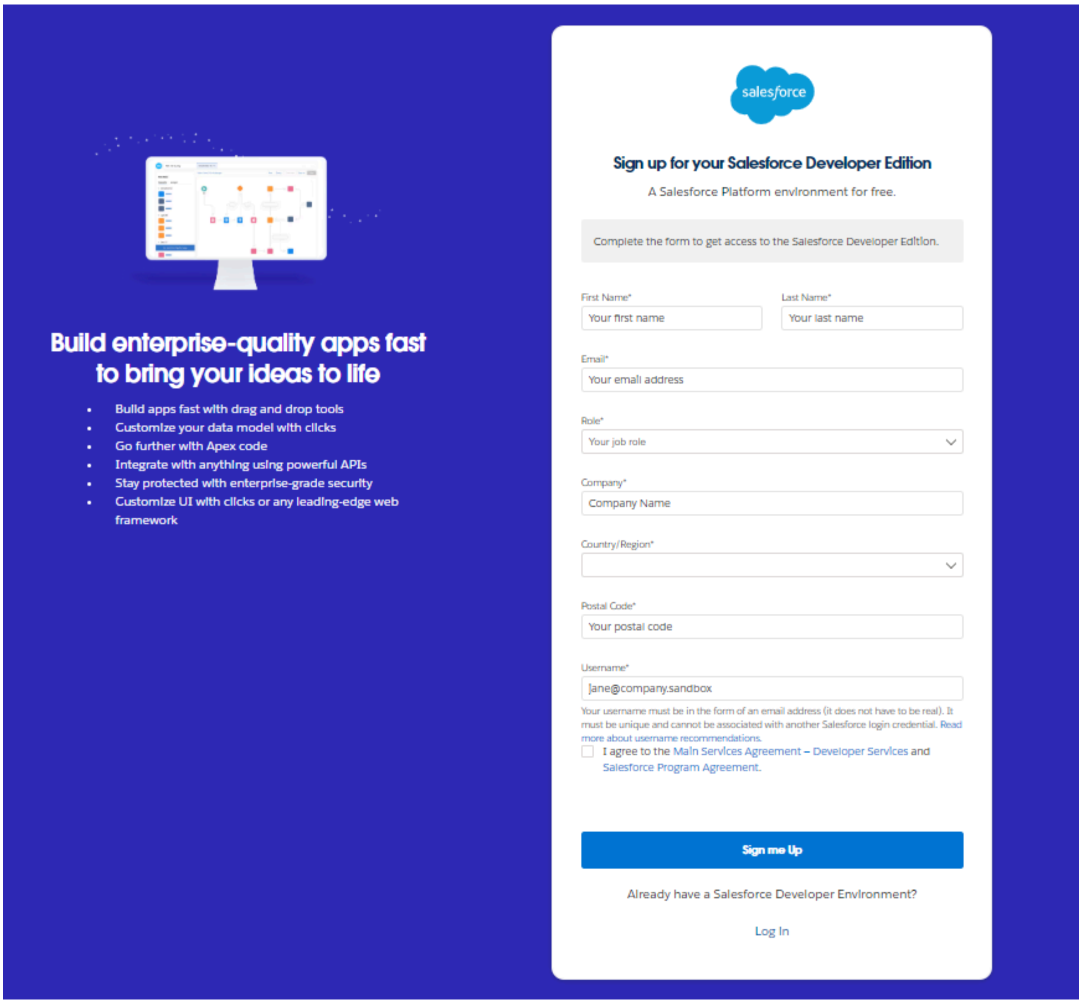
1. Creation of Salesforce Org

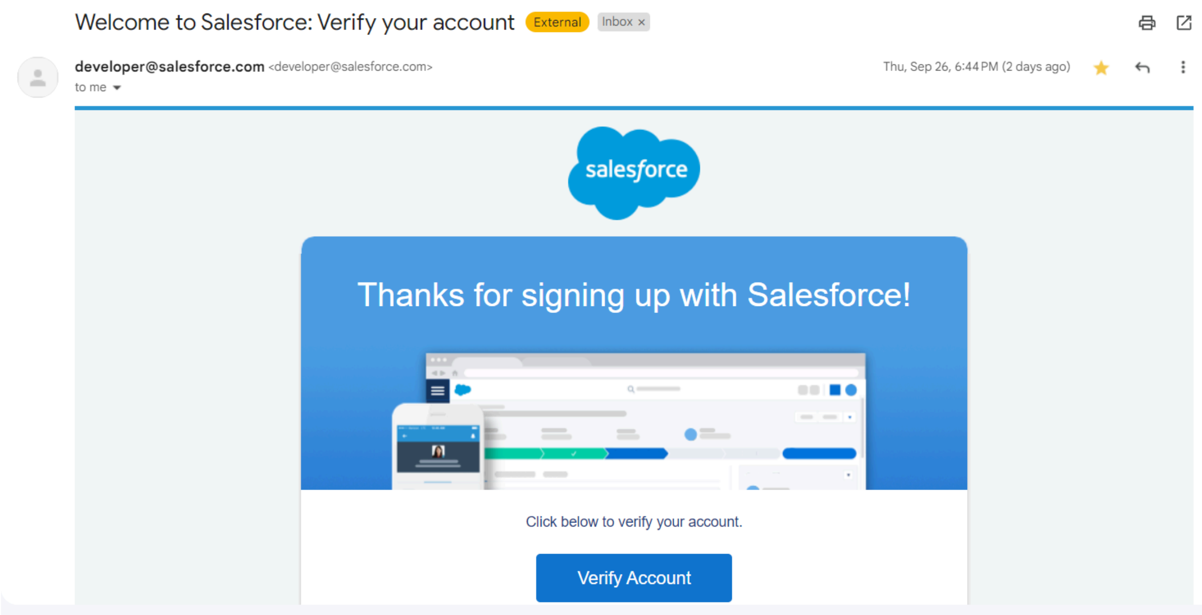
Step 1: Sign Up for a Developer Org

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



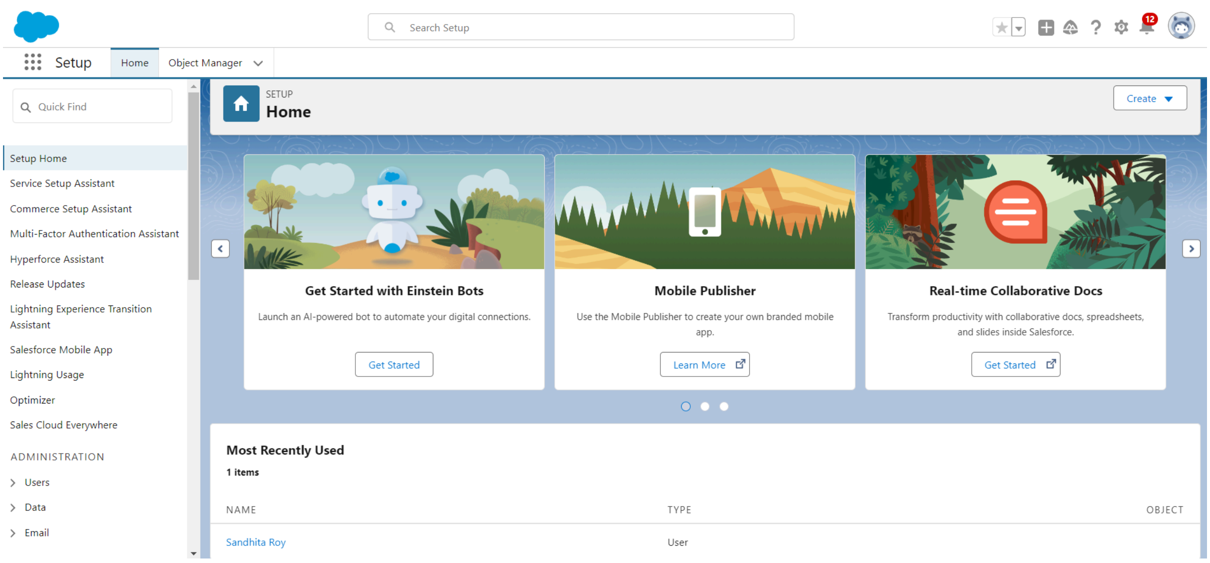
Step 2: Sign Up for a Developer Org

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



Step 3: Login to your Salesforce Account

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



2. Object

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

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

2.1. Creating Objects for BeautySphere

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

Step 1: Access Setup

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

Step 2: Open Object Manager

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

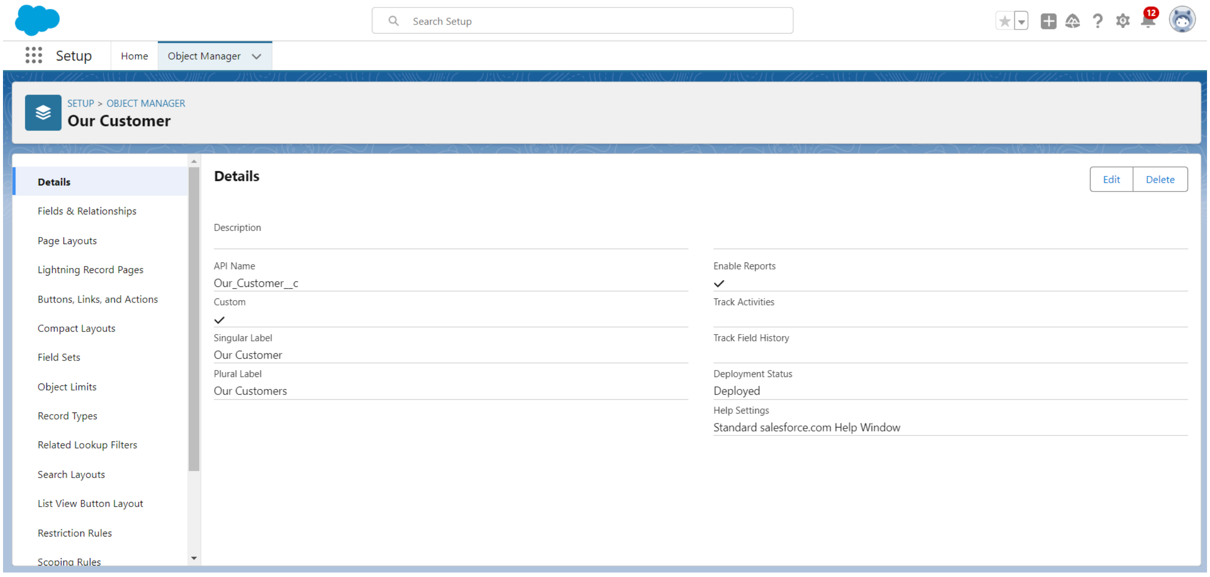
Step 3: Create a Custom Object

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

Step 4: Create "Our Customer" Object

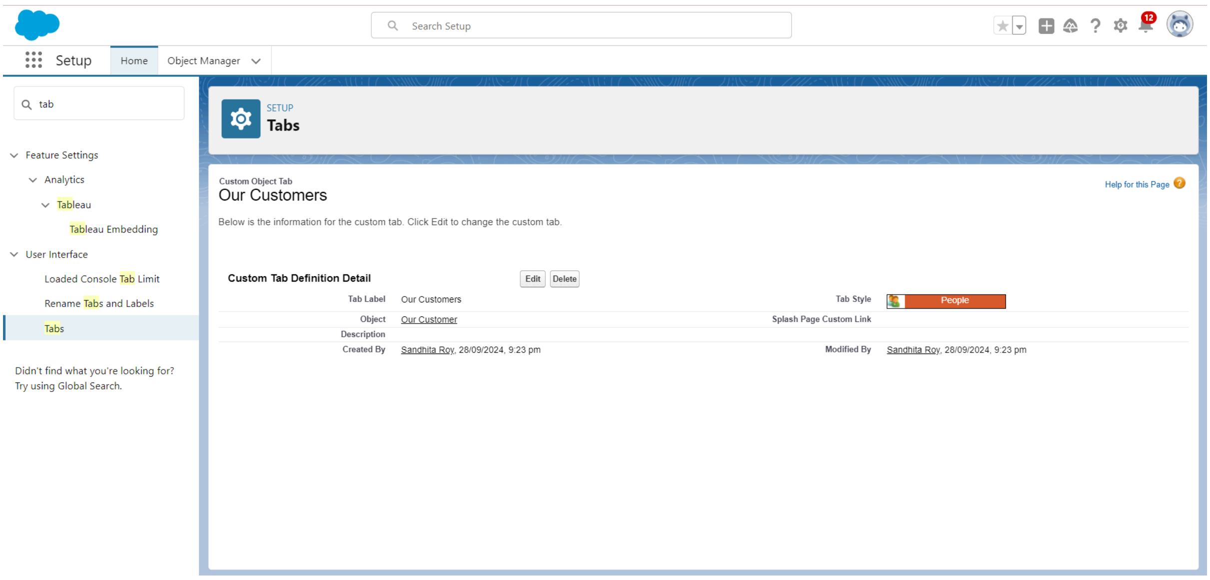
1. On the Custom Object Definition page, enter the following details:
    a. **Label**: Our Customer
    b. **Plural Label**: Our Customers
    c. **Record Name**: Our Customer

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



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

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



2.2. Creating the Consultants Object

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

Step 1: Access Setup

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

Step 2: Open Object Manager

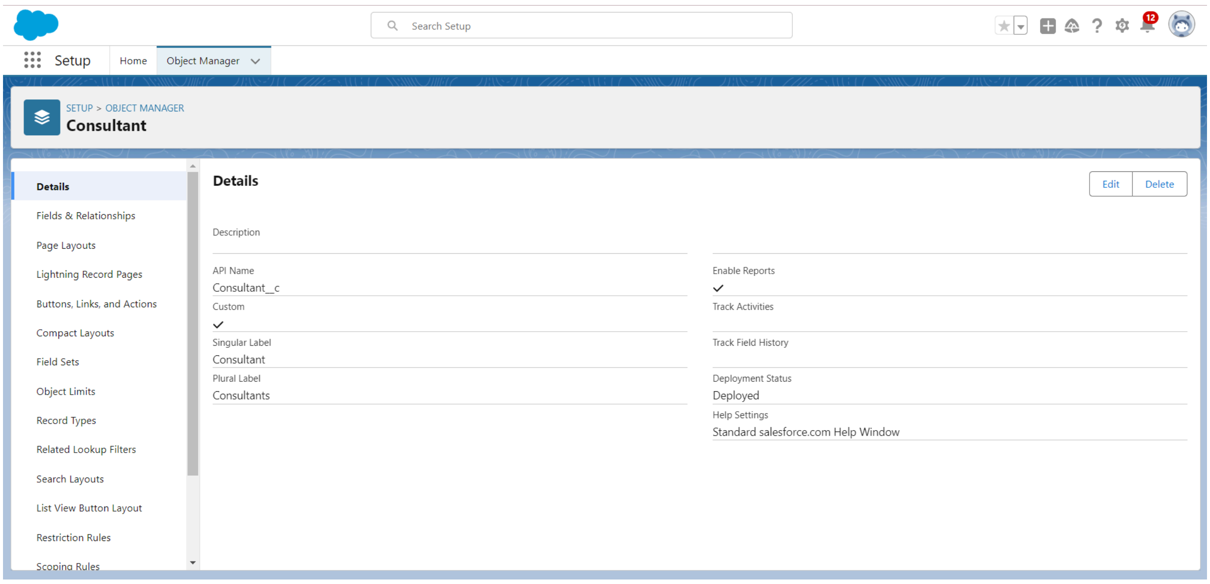
1. Click on the "**Object Manager**" tab located next to the Home tab.

Step 3: Create a Custom Object

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

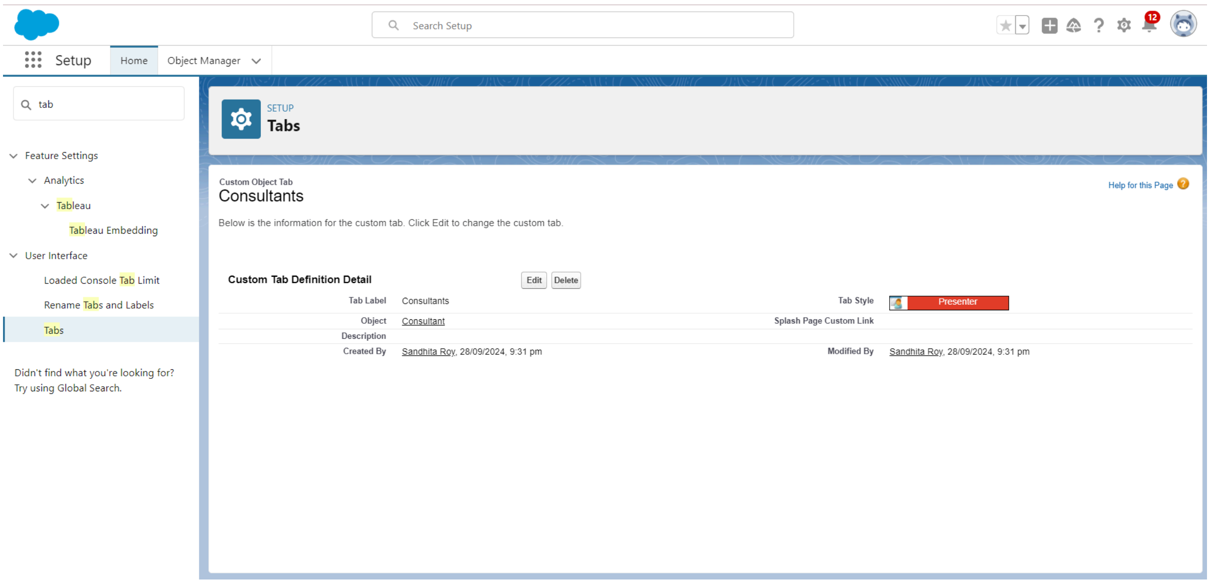
Step 4: Create "Consultants" Object

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



Step 5: Create a Custom Tab for "Consultants"

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



2.3.Creating the Retailers Object

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

Step 1: Access Setup

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

Step 2: Open Object Manager

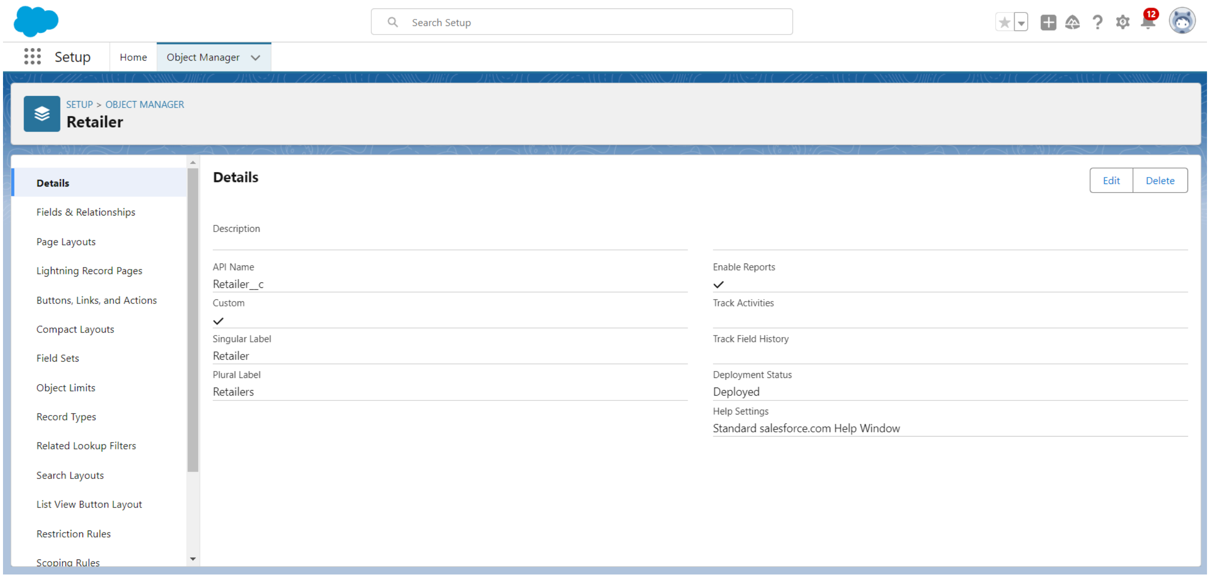
1. Click on the "**Object Manager**" tab located next to the Home tab.

Step 3: Create a Custom Object

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

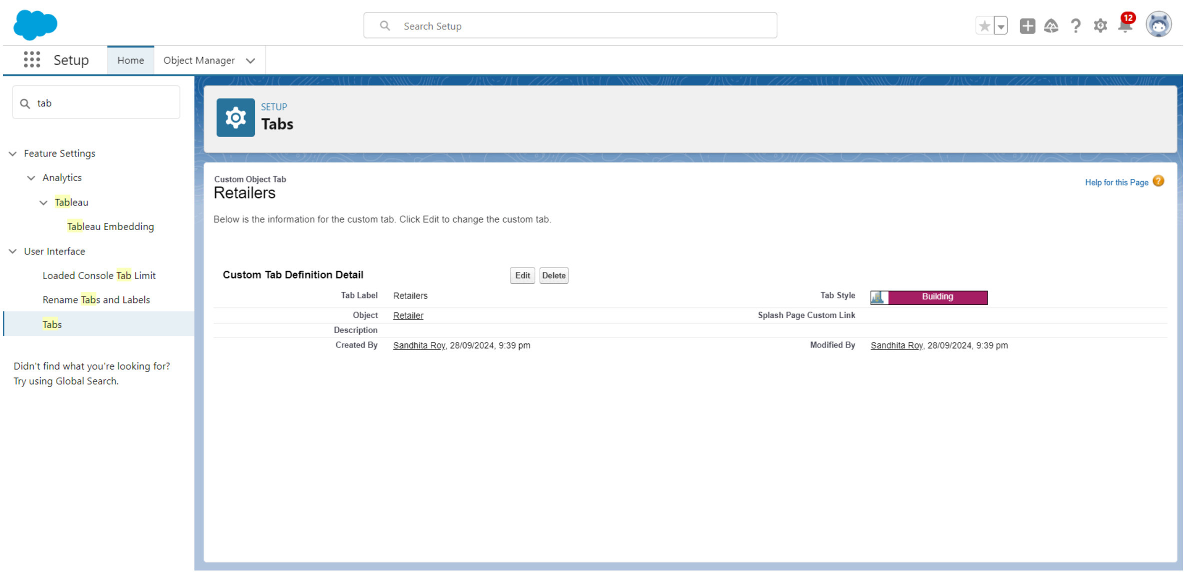
Step 4: Create "Retailers" Object

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



Step 5: Create a Custom Tab for "Retailers"

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



2.4. Creating the Others Object

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

Step 1: Access Setup

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

Step 2: Open Object Manager

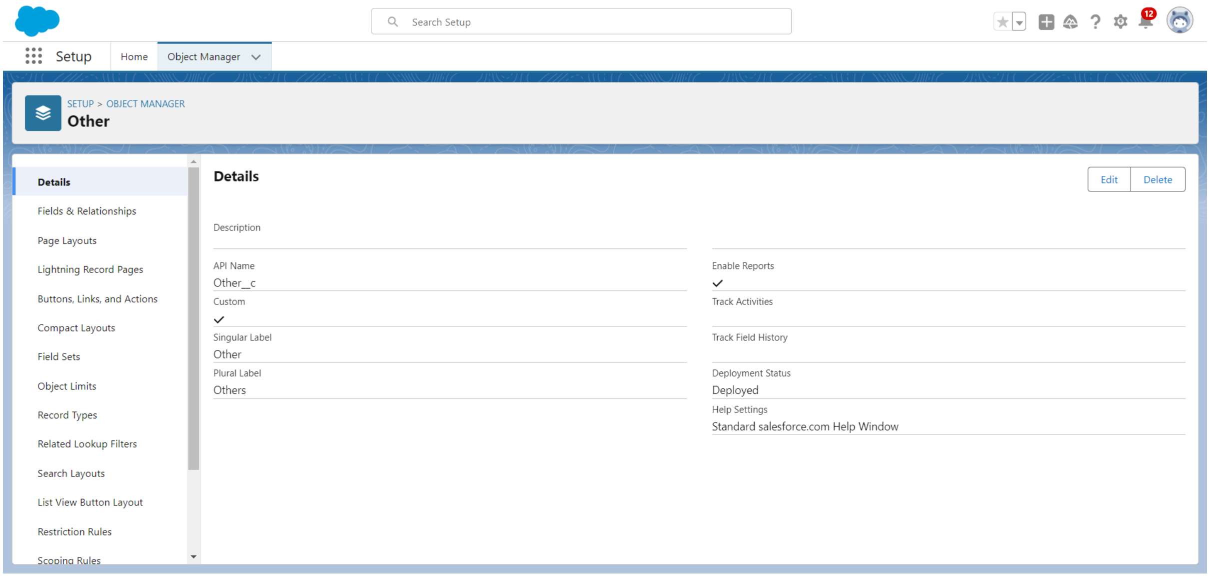
1. Click on the "**Object Manager**" tab located next to the Home tab.

Step 3: Create a Custom Object

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

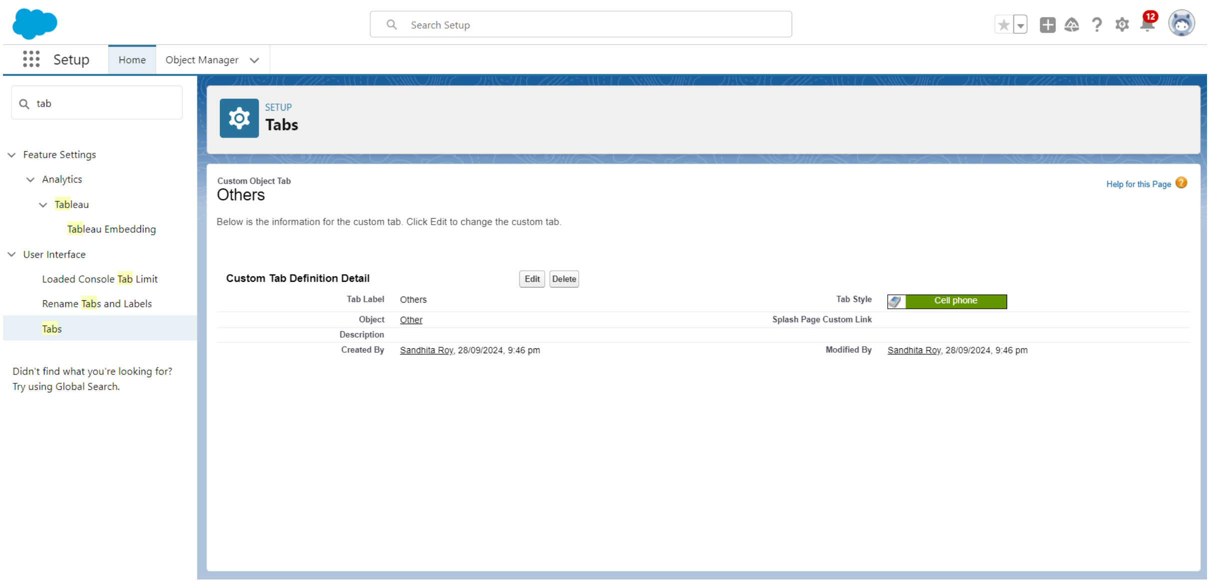
Step 4: Create "Others" Object

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



Step 5: Create a Custom Tab for "Others"

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



3. Fields and Relationships

In Salesforce, an object relationship is a two-way association between two objects, allowing users to connect and interact with related data across different objects. This relationship is established by creating custom relationship fields on an object. These relationship fields enable users to view records and seamlessly access related information, providing a comprehensive view of data across the Salesforce environment. By using relationships, Salesforce ensures that all related data is interconnected, making it easier for users to navigate between related records, improving data consistency, and enhancing the overall user experience.

3.1. Fields in the "Our Customers" Object

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

S No.	**Field Label**	**Data Type**
1	Customer id	Auto Number
2	Customer Name	Text
3	Mobile Number	Phone
4	Email id	Email
5	Address	Text Area
6	Additional Information	Text Area

3.2. Fields in Consultants objects

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

S No.	**Field Label**	**Data Type**
1	Customer id	Auto Number
2	Customer Name	Text

3	Mobile Number	Phone
4	Email id	Email
5	Delivery Type 1) Self Pickup 2) Courier	Picklist
6	Products 1) Lipstick 2) Compact 3) EyeLiner 4) FacePack 5) Lip Balm 6) Nail Polish	Multi-Picklist
7	Payment 1) Card 2) Credit Card 3) UPI 4) Cash	Picklist
8	Customer Details	Lookup (Our Customers Object)
9	Address	Text Long

3.3. Fields in Retailers objects

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

S No.	Field Label	Data Type
1	Customer id	Auto Number
2	Customer Name	Text
3	Mobile Number	Phone
4	Email id	Email
5	Delivery Type 1) Self Pickup 2) Courier	Picklist

6	Products 1) Lipstick 2) Compact 3) EyeLiner 4) FacePack 5) Lip Balm 6) Nail Polish	Multi-Picklist
7	Payment 1) Card 2) Credit Card 3) UPI 4) Cash	Picklist
8	Customer Details	Master-Detail relationship (Our Customers Object)

3.4. Fields in Others objects

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

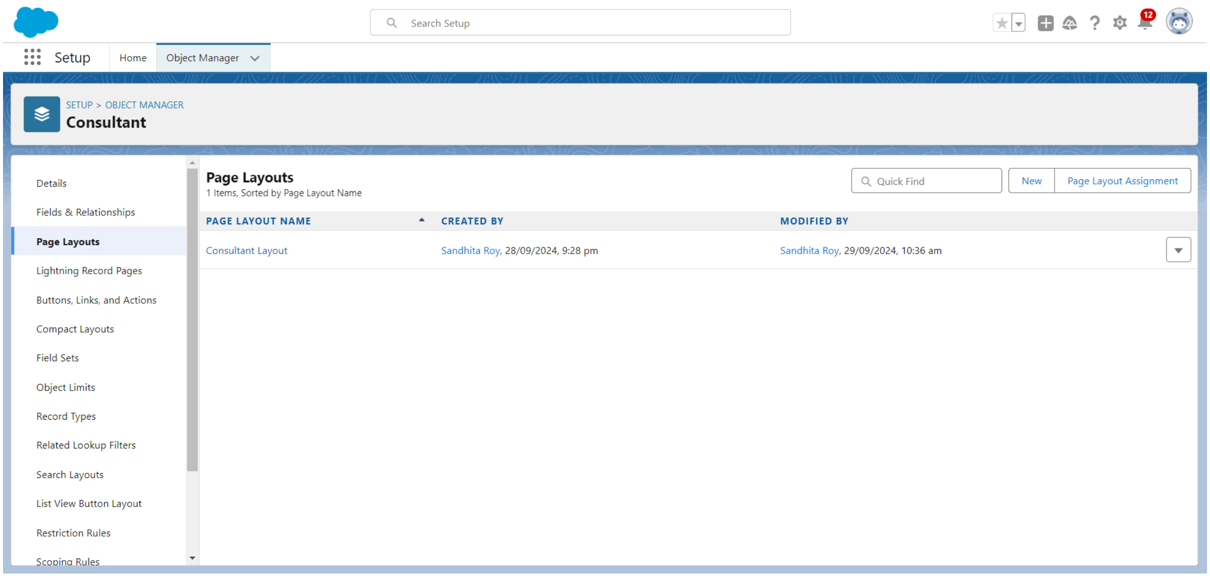
S No.	**Field Label**	**Data Type**
1	Name	Text
2	Employee 1) Company Employee 2) Staff 3) Special Reference	Picklist
3	Coupon	Text
4	Products 1) Lipstick 2) Compact 3) EyeLiner 4) FacePack 5) Lip Balm 6) Nail Polish	Multi-Picklist

4. Page Layouts

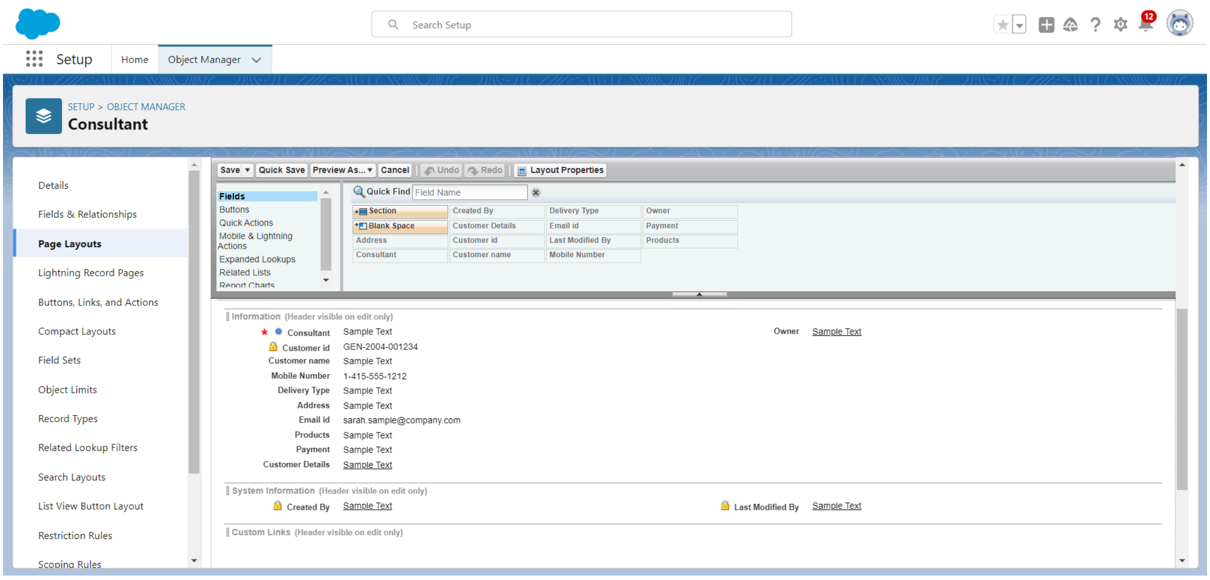
In Salesforce, page layouts define the organization and arrangement of fields, buttons,related lists, and other components on an object's detail and edit pages. They allow you to control the user interface and tailor it to meet the specific needs of your organization.

Page Layout Creation:

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



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



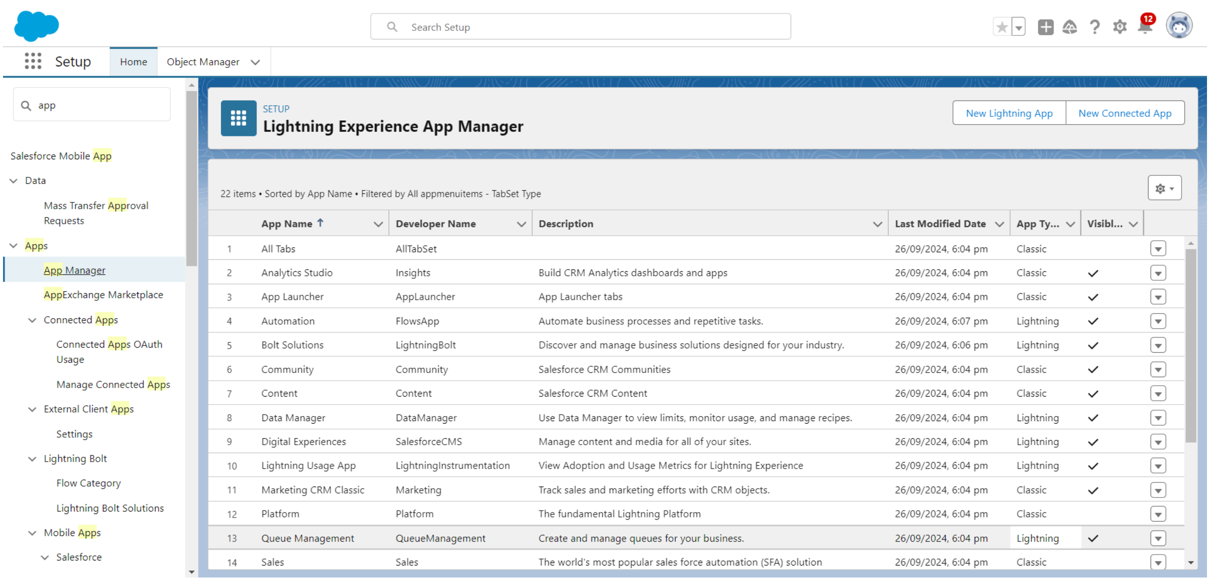
5. The Lightning App

An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar. Lightning apps let you brand your apps with a custom Color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your org can work more efficiently by easily switching between apps.

5.1.Create a Lightning App

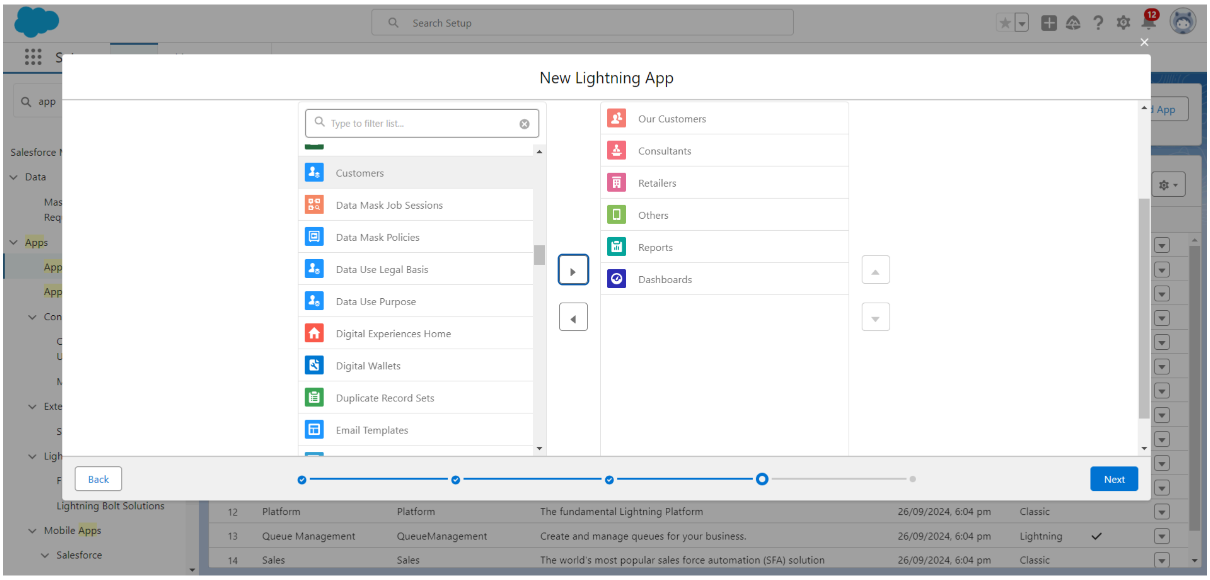
To create a Lightning app page:

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



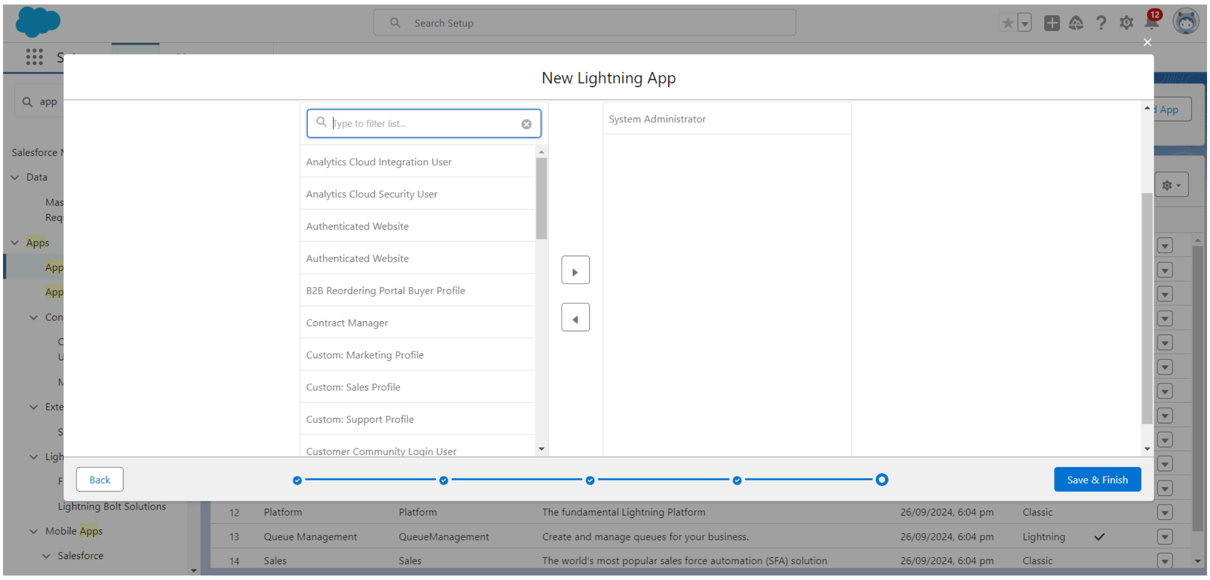
To Add Navigation Items:

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



To Add User Profiles:

1. Search for profiles (**System Administrator**) in the search bar.
2. Click on the arrow button to add the profile.
3. Click **Save & Finish**.



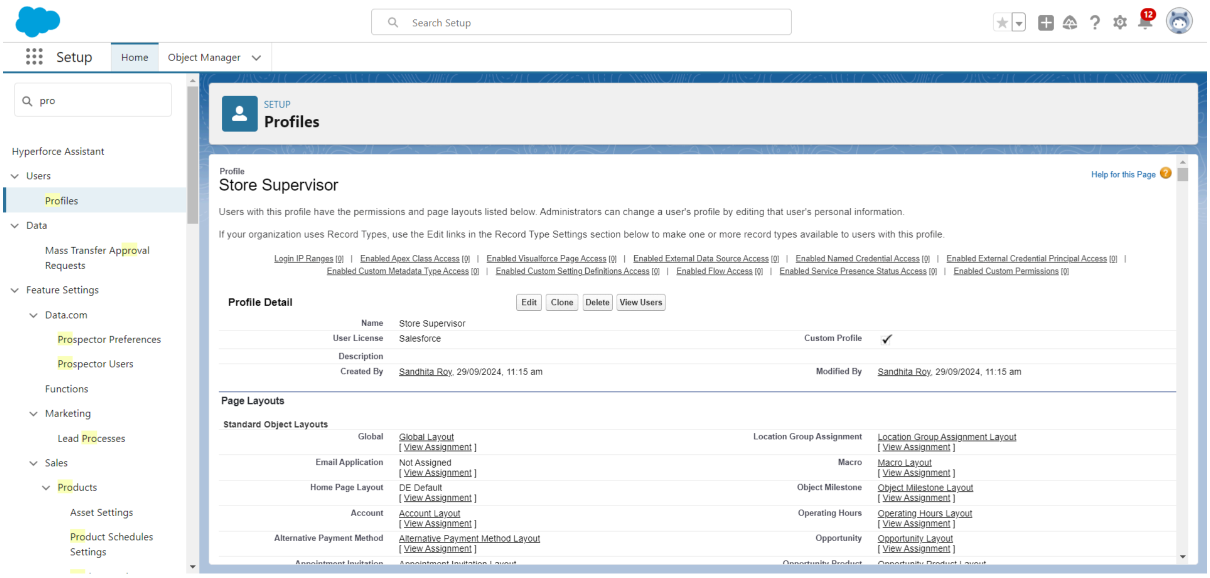
6.Profile

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. A profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges.

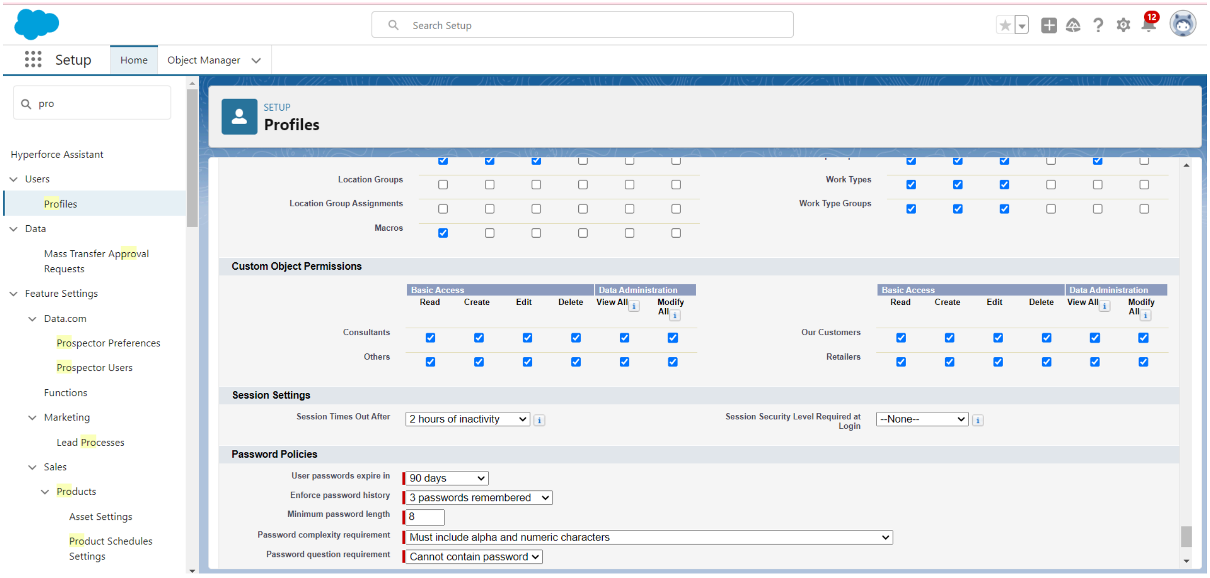
6.1. Creating a Profile

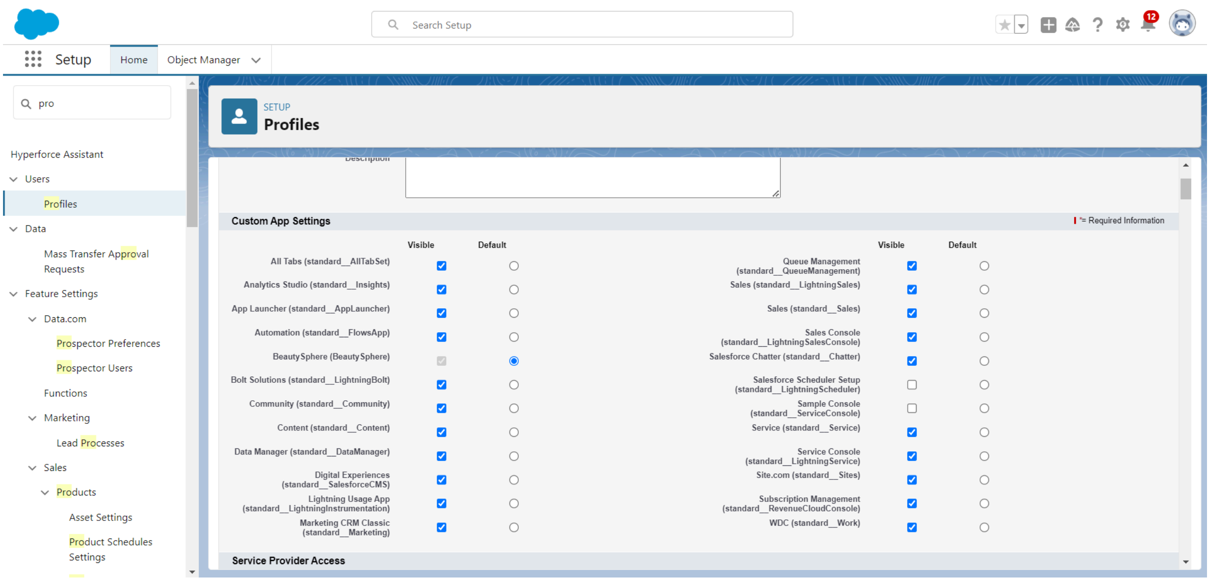
Creating a Store Supervisor Profile and Setting Object Permissions:

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



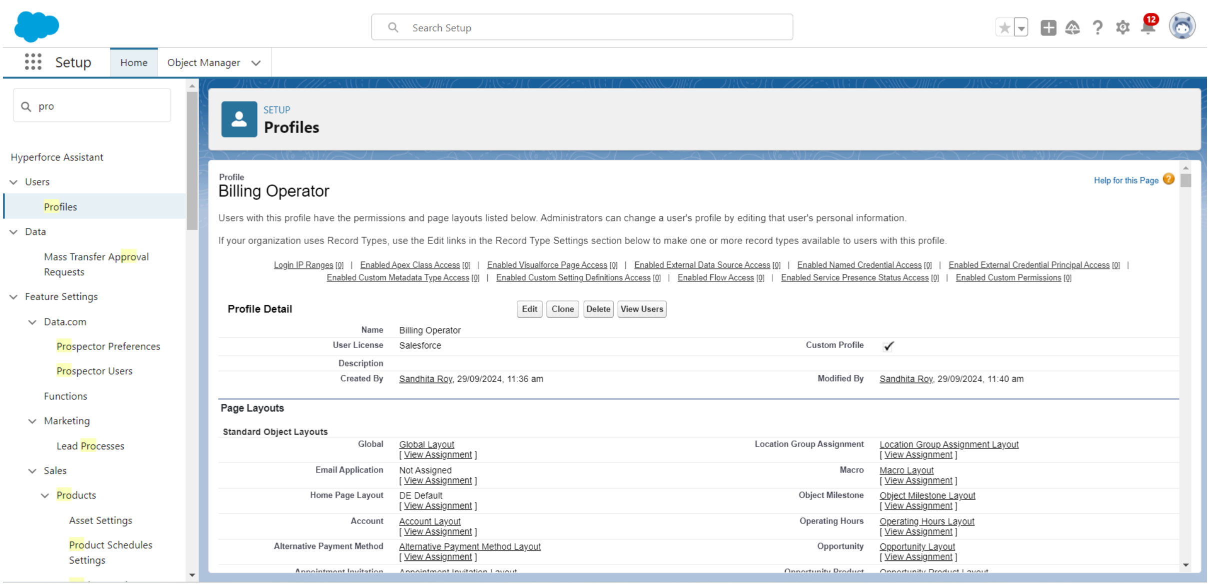
6. While still on the Store Supervisor profile page, click **Edit**.
7. Scroll down to Custom Object Permissions and give access for **Create, Read, Edit, Delete, View All,** and **Modify All** for the **Our Customers, Consultants, Retailers, Others** objects.
8. Scroll down to Custom App Settings and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





Similarly, Create an Operator Profile:

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

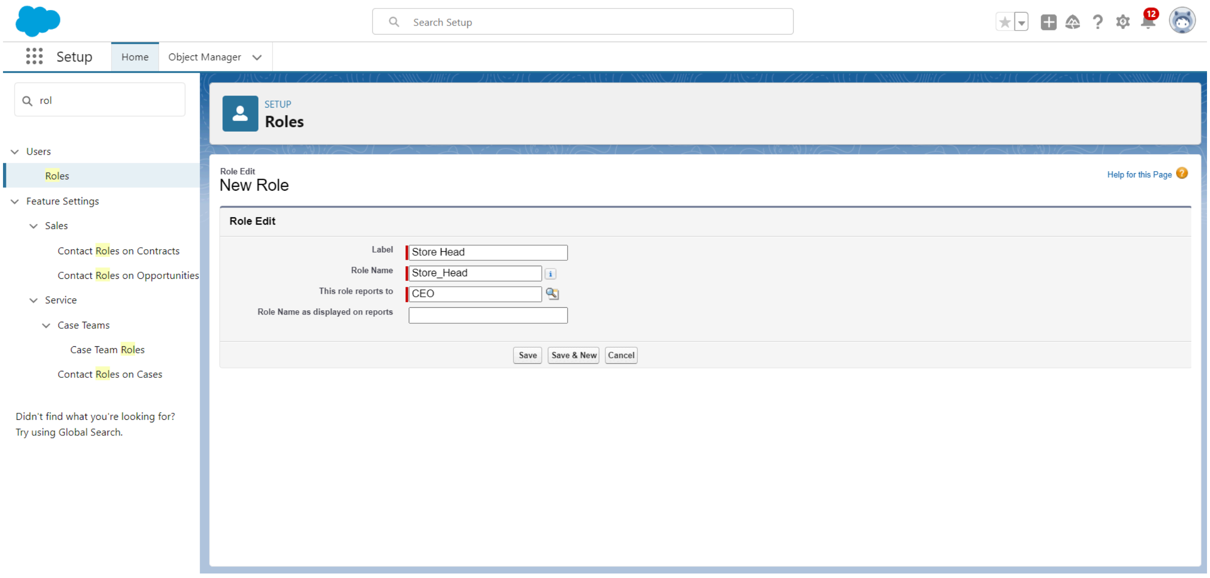


7. Setup Roles

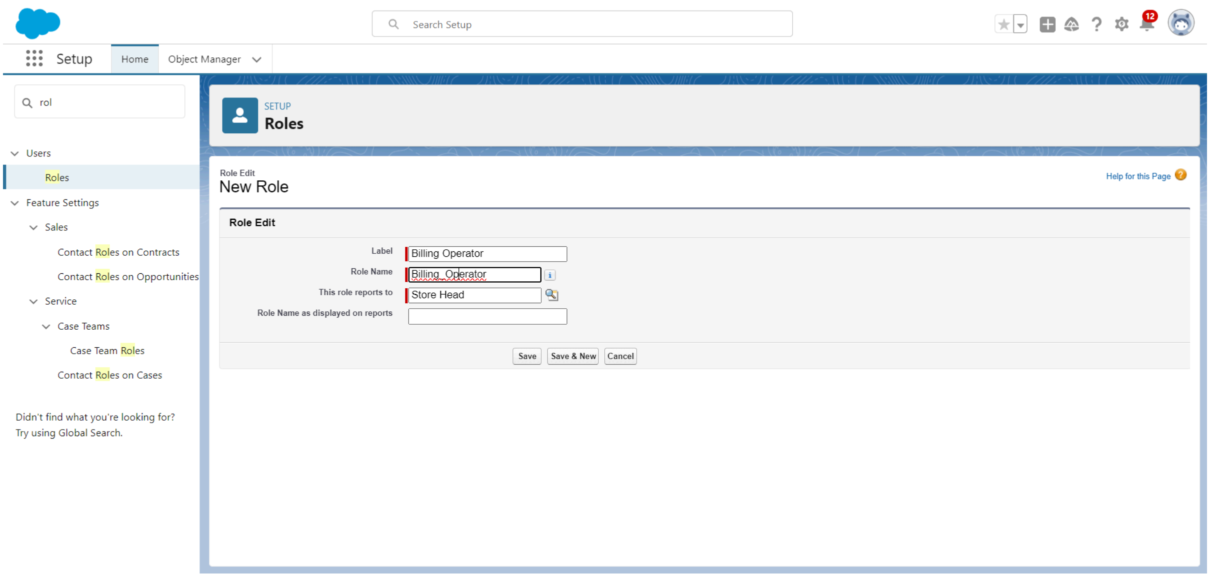
Roles are record-level access controls that define what data a user can see in Salesforce.

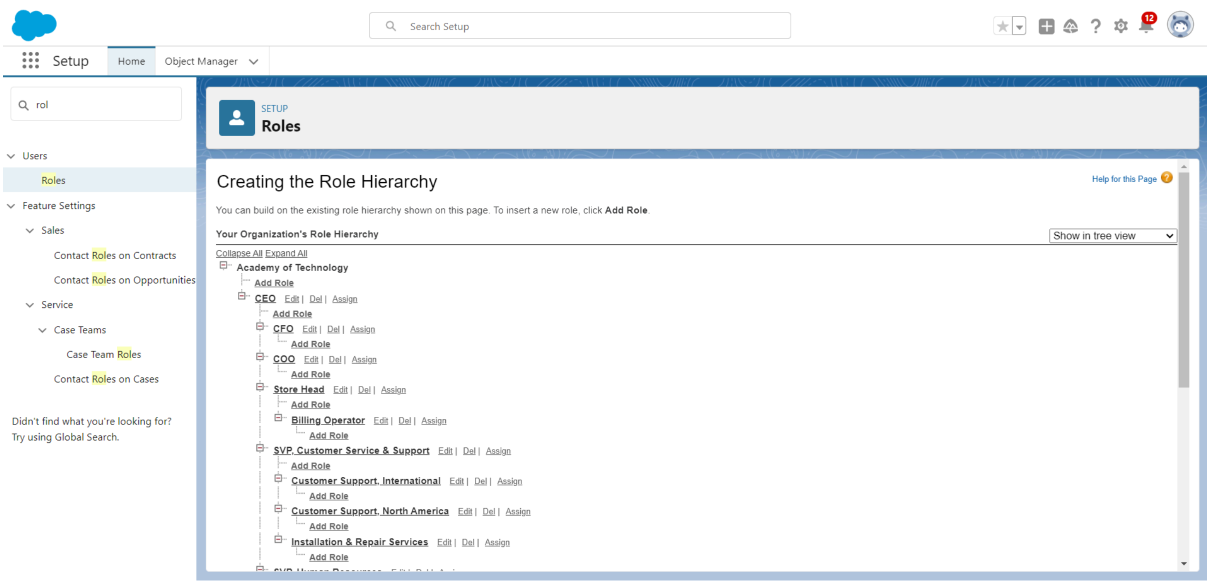
Setup Roles:

1. Click on the **Gear Icon**.
2. Click **Setup**.
3. In the Quick Find box, enter Roles.
4. Click **Roles**.
5. Click on **Set Up Roles**.
6. Click **Expand All**.
7. Under the **CEO**, click on **Add Role**.
8. Fill in the Label as **Store Head**, and the Role Name as **Store_Head**.
9. Enter a Role Name that will be displayed on reports.
10. Click on **Save**.



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



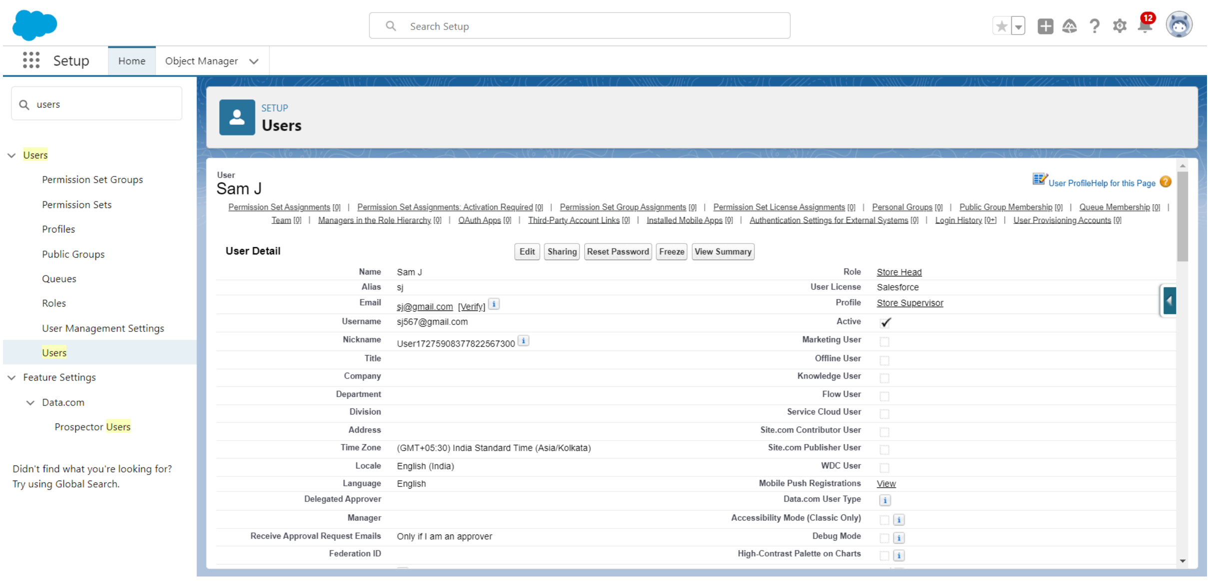


8. Users

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

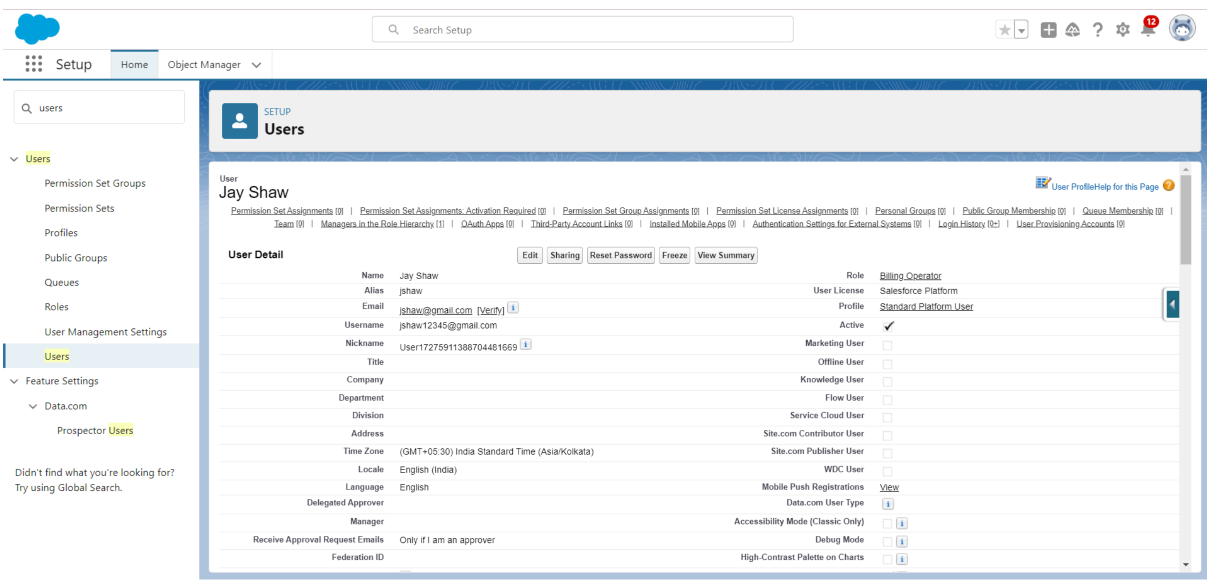
Creating a User:

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



Second User Creation:

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

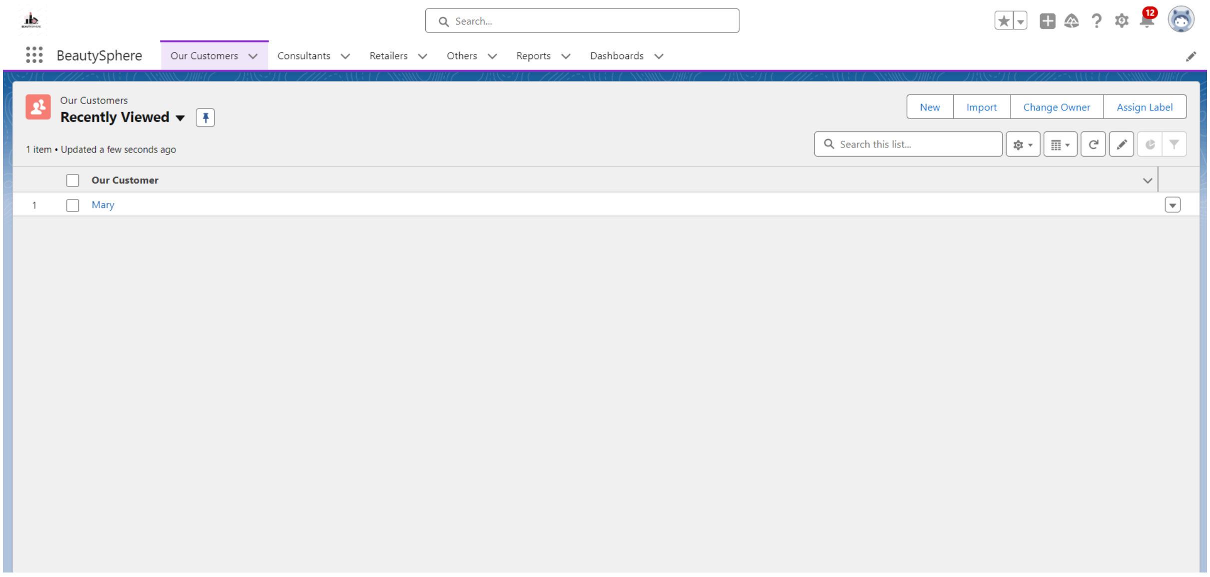


9. User Adoption

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

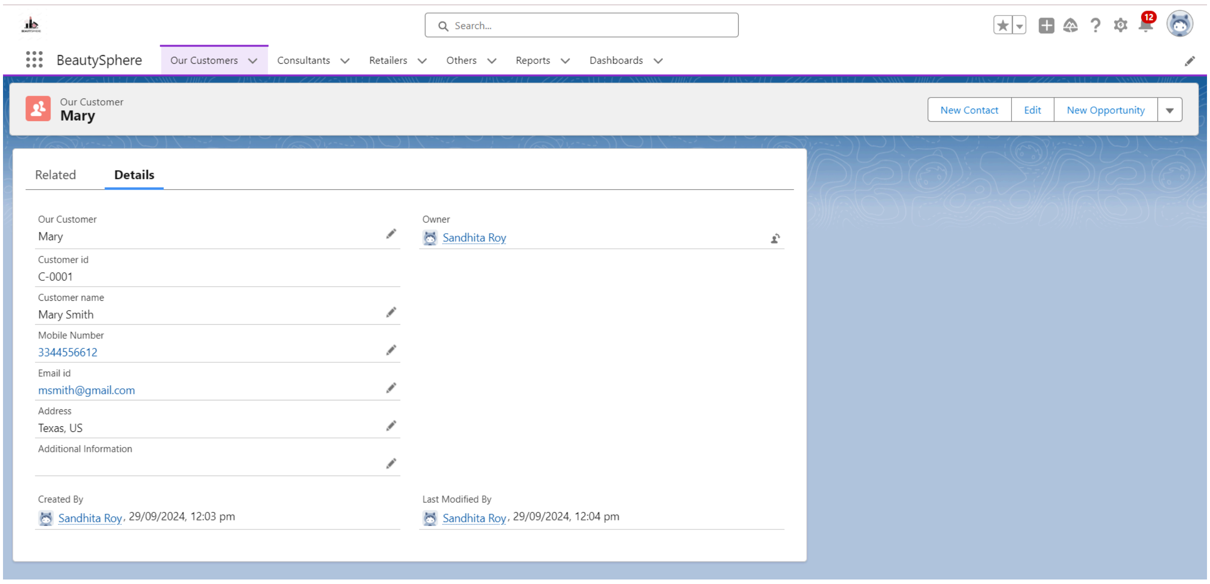
Create Our Customer Record

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



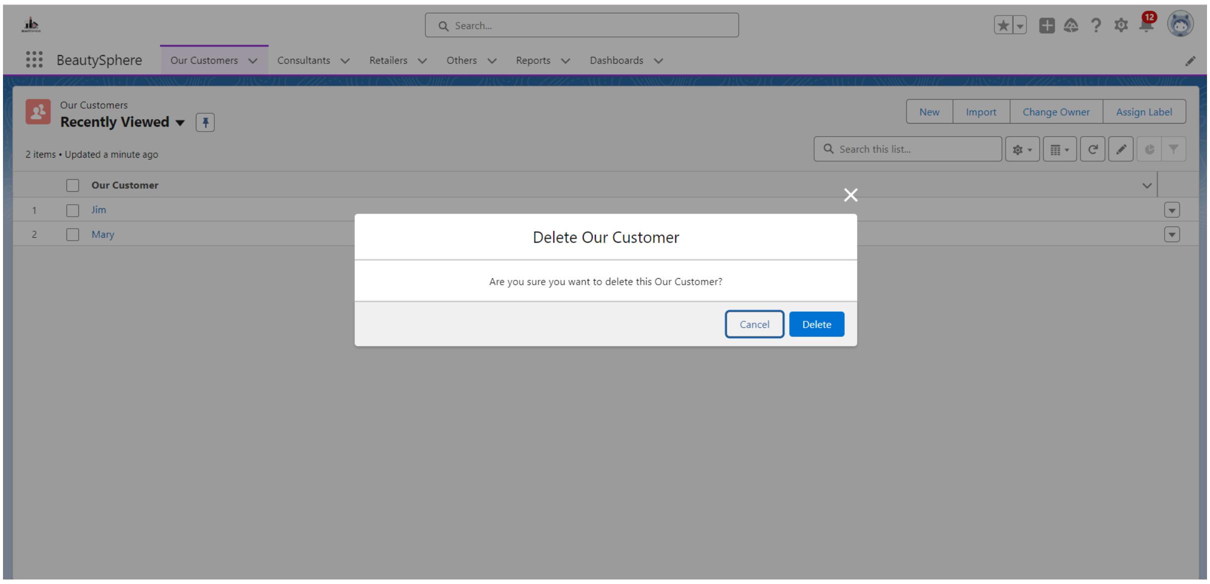
View Record (Our Customer)

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



Delete Record (Our Customer)

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

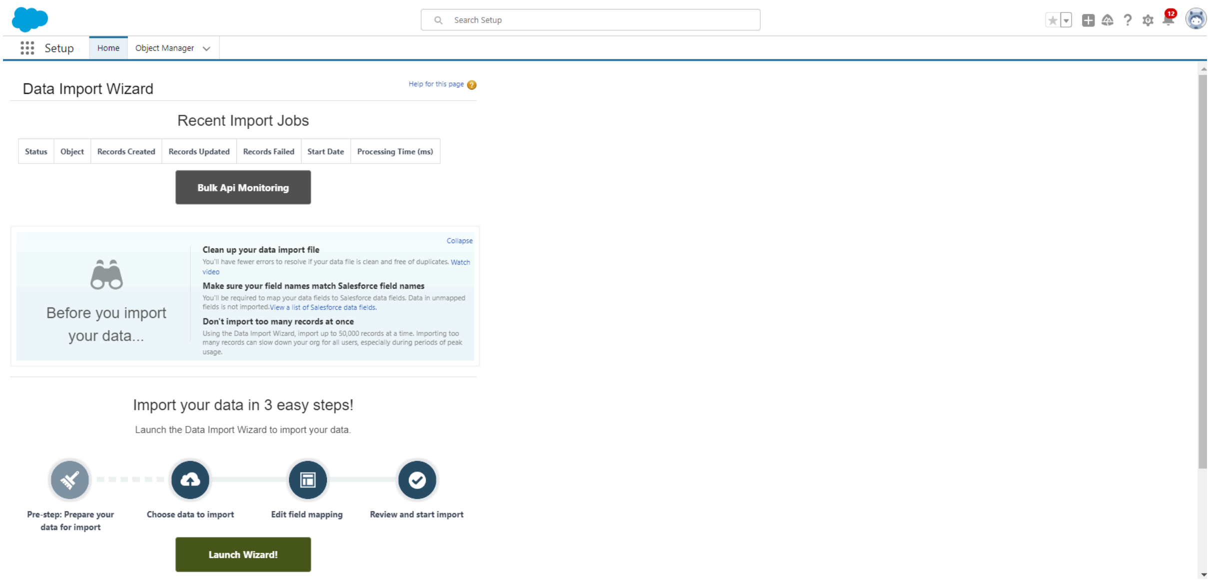


10. Import Data

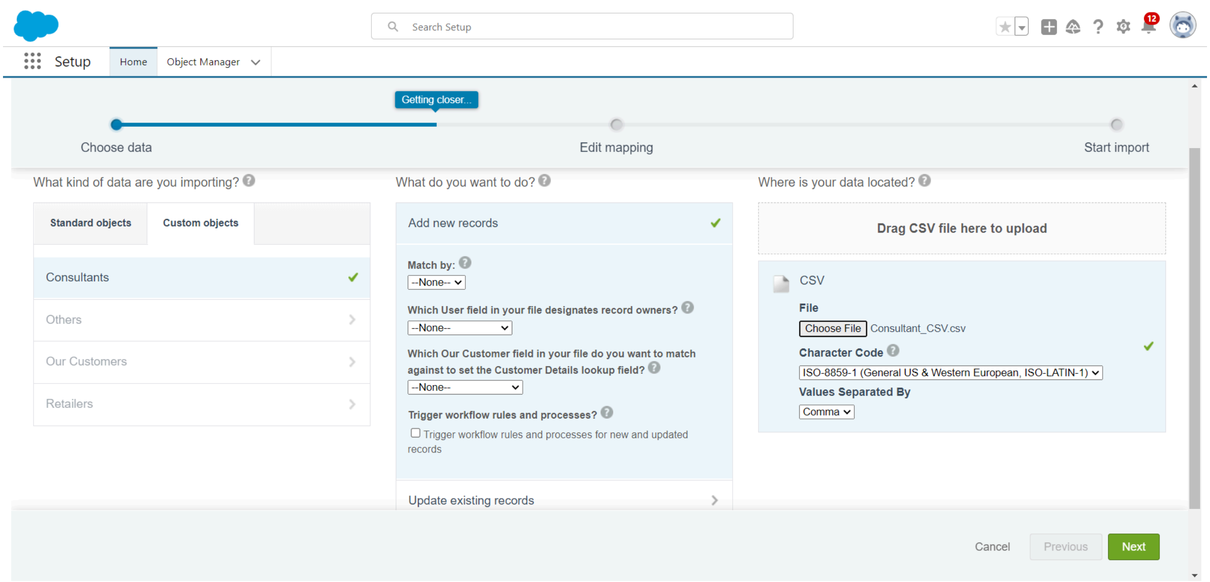
Data Import Wizard—This tool, accessible through the Setup menu, allows you to import data into common standard objects such as Contacts, Leads, Accounts, as well as data into custom objects.

To Import Data

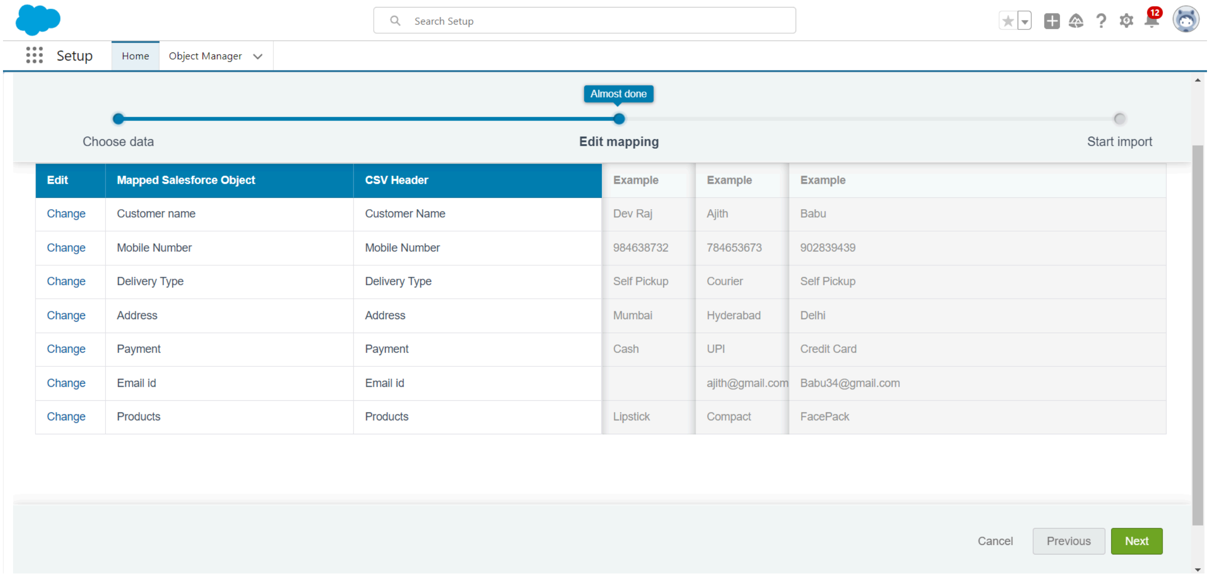
1. From Setup, click the **Home** tab.
2. In the Quick Find box, enter Data Import and select **Data Import Wizard**.
3. Click **Launch Wizard!**



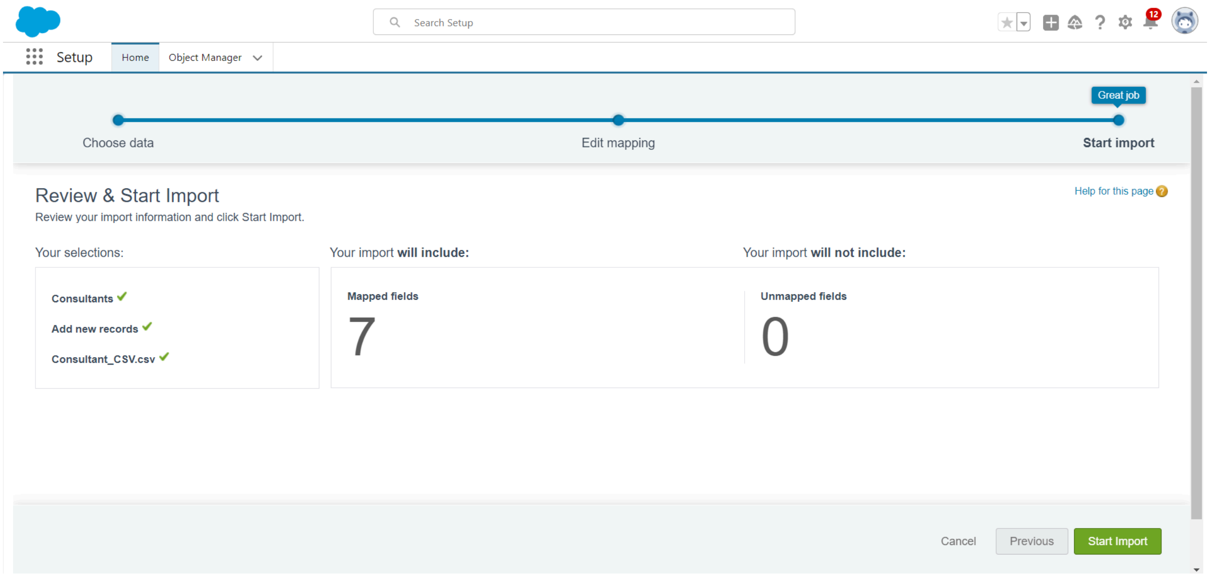
4. Click the Custom Objects tab and select the **Consultant** object
5. Select **Add New Records**.
6. Click **CSV** and choose the file **Consultant_CSV** which was created earlier. Click **Next**.



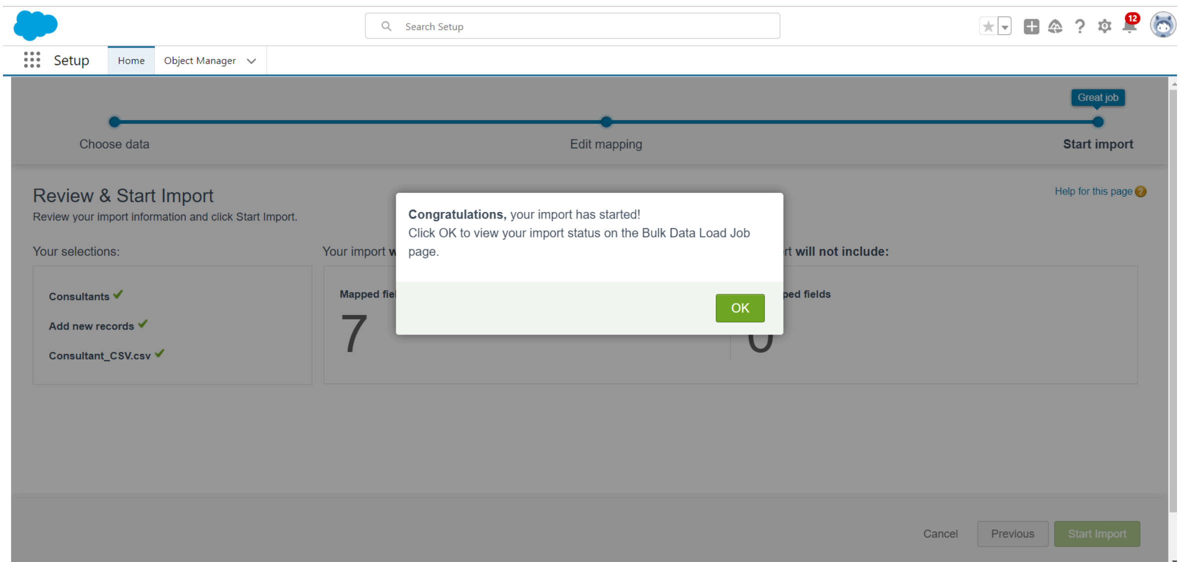
7. Since the field names in the CSV file (CSV Header) are the same as the field names in your object (Mapped Salesforce Object), the fields are automatically mapped. Click **Next**.



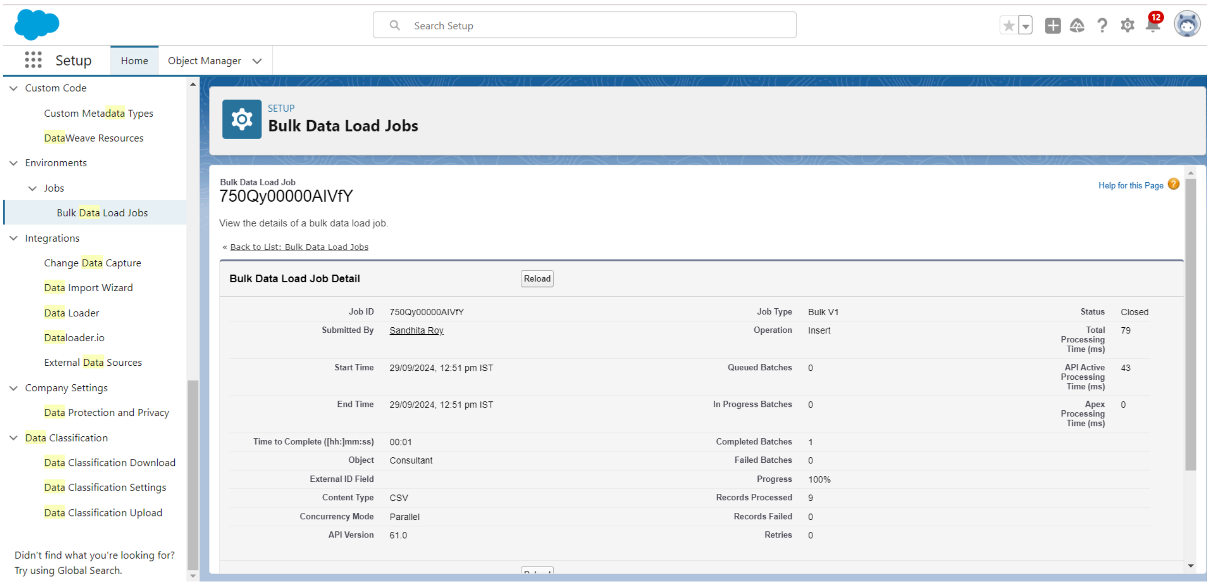
8. The next screen gives you a summary of your data import. Click **Start Import**.



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: Perform Field Mapping carefully.

11. What are Reports?

Reports

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

There are 4 types of report formats in Salesforce:

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

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

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

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

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

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

There are 2 types of report types:

1. **Standard Report Types**:

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

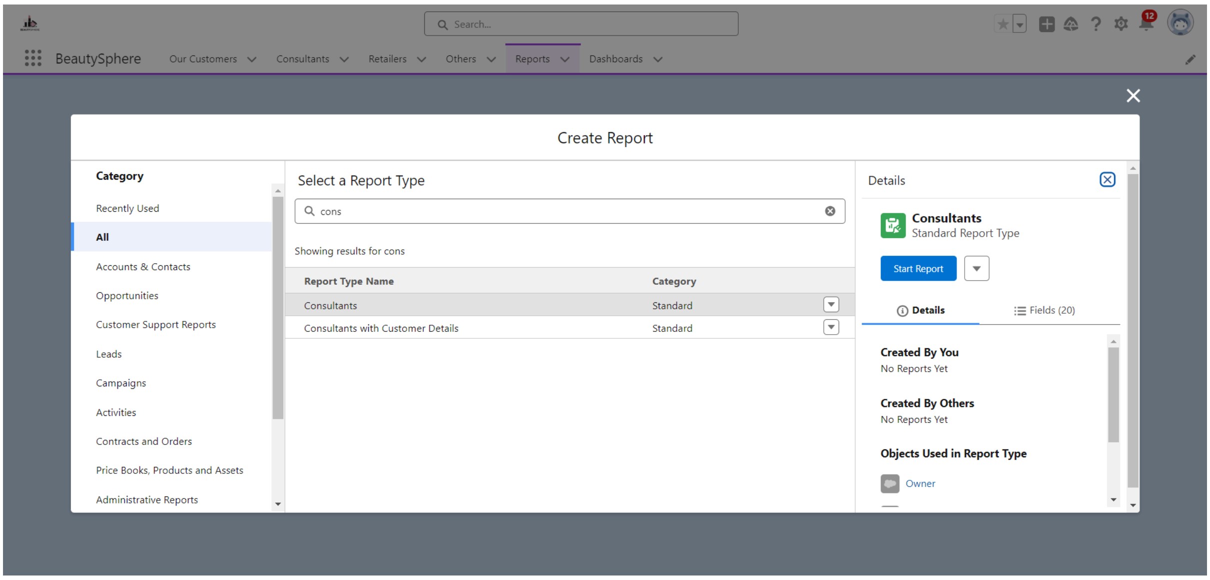
2. **Custom Report Types**:
- Created by an administrator or user with "Manage Custom Report Types" permission when standard report types cannot specify which records will be available in reports.
- Allows specification of objects that will be available in a particular report.
- The primary object must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

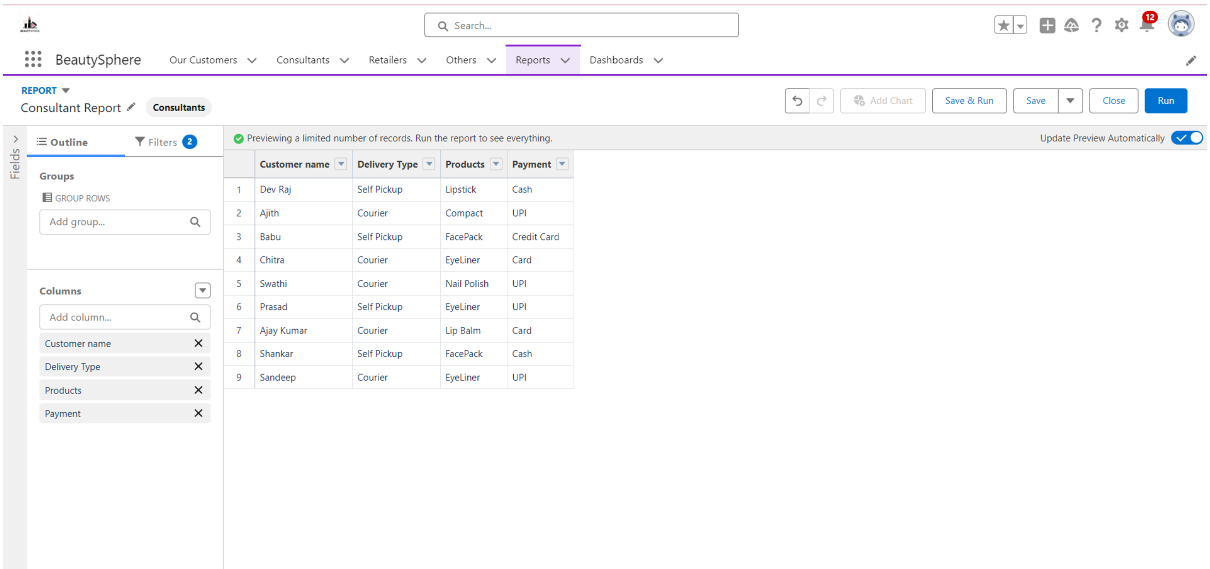
There are 3 types of access levels for folders:

1. **Viewer**:
    - Users can see the data in a report but cannot make any changes except cloning it into a new report.
2. **Editor**:
    - Users can view and modify the reports and move them to/from any other folders they have access to as Editor or Manager.
3. **Manager**:
    - Users can do everything Viewers and Editors can do, plus control other users' access levels to the folder.
    - Managers can also delete the report.

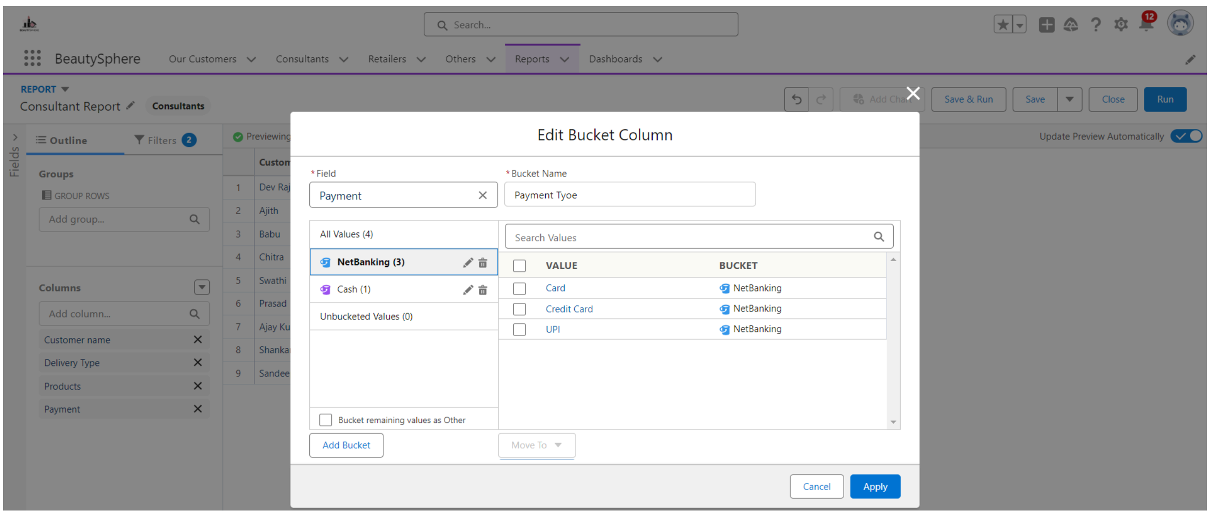
11.1. Create Report

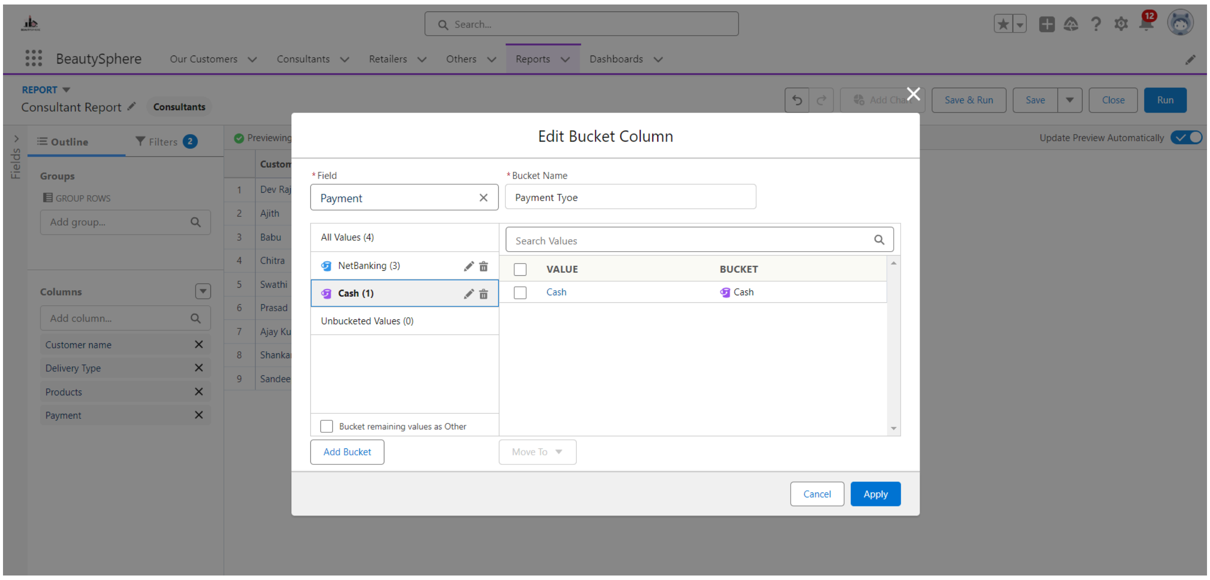
1. Click **App Launcher**.
2. Select **BeautySphere** App.
3. Click the **Reports** tab.
4. Click **New Report**.
5. Select the report type as **Consultants** and click **Start Report**.
6. Customize your report by selecting the following columns: **Consultant Name, Delivery Type, Products, Payment**.
7. Click the drop-down option on the **Payment** column and select **Bucket This Column**.
8. Name the bucket **Payment Type**.



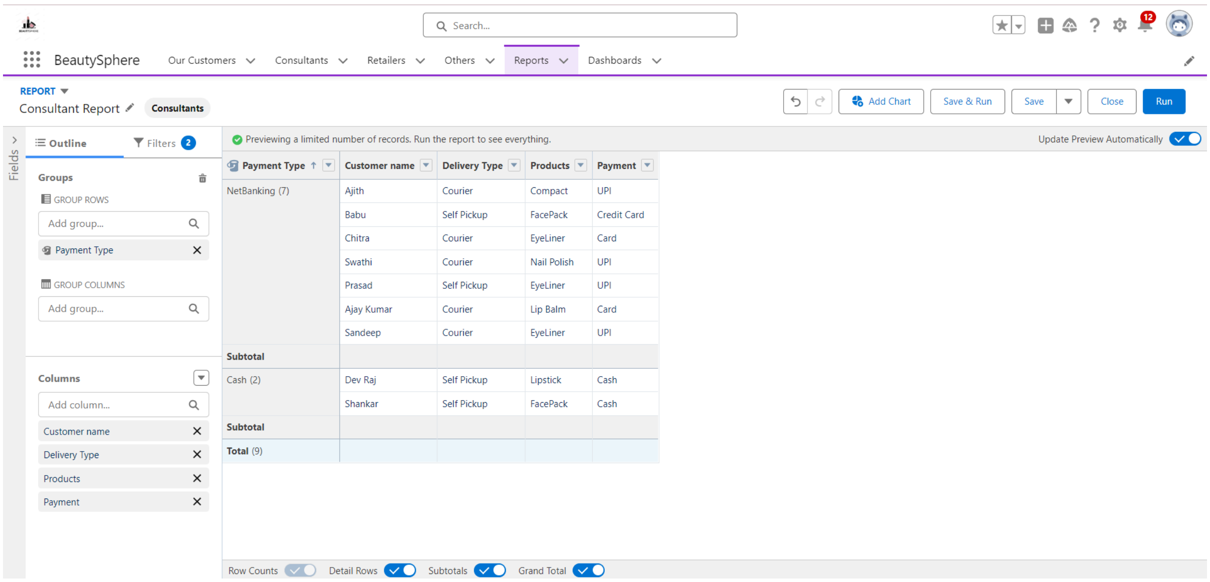


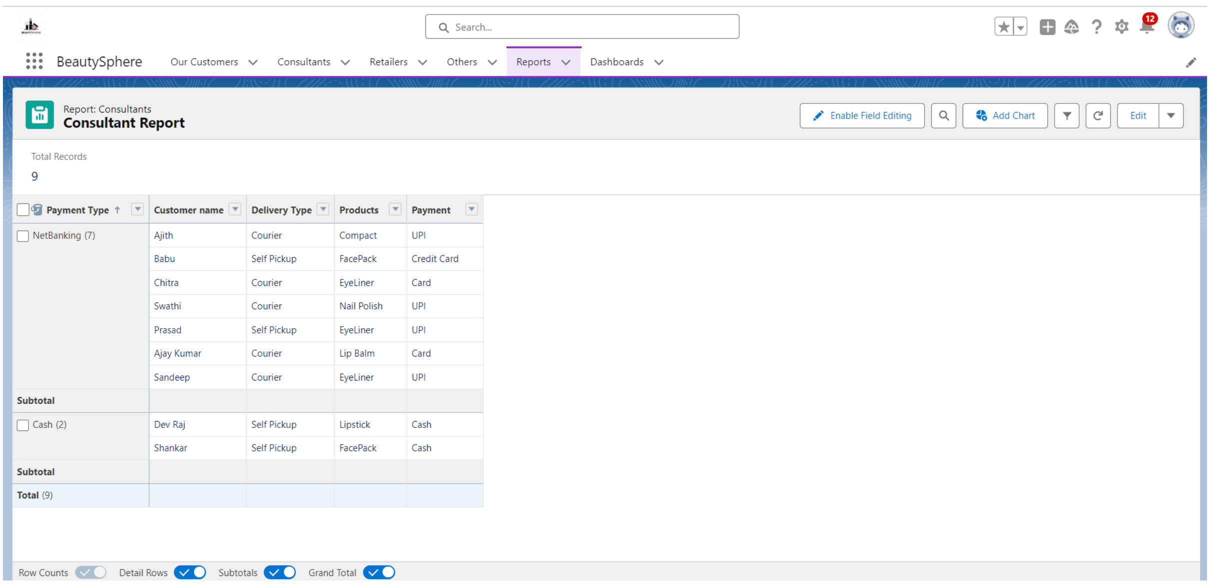
9. Click **Add Bucket** and name it **NetBanking**.
10. Click **Add Bucket** and name it **Cash**.
11. Click on **All Values**, select **Credit Card, Card, UPI**, and move them to **NetBanking**.
12. Click on **All Values** again, select **Cash**, and move it to **Cash**.
13. Click **Apply**.





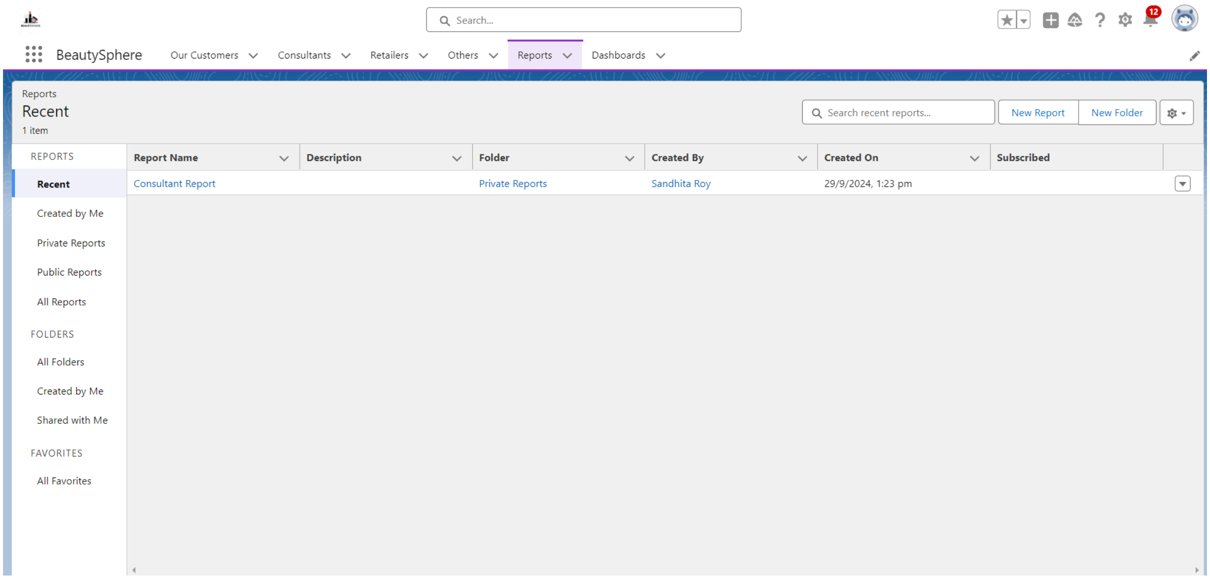
14. In Group Rows, add the **Payment Type** Bucket field.
15. Click **Refresh**.
16. Click **Save and Run**.
17. Give the report a name, e.g., Consultant Report.
18. Click **Save**.





11.2. View Report

1. Click on the **App Launcher** on the left side of the screen.
2. Search for the **BeautySphere** App and click on it.
3. Click the **Reports** tab.
4. Click on the BeautySphere **Report** to view the records.



12. Dashboards

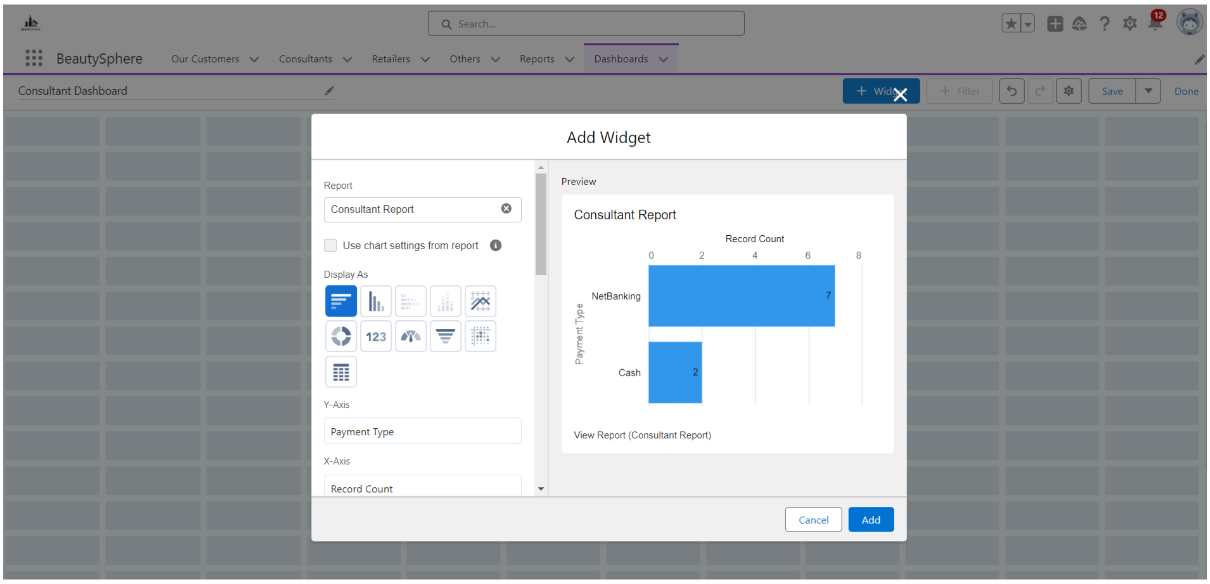
Dashboards let you curate data from reports using charts, tables, and metrics. If your colleagues need more information, then they're able to view your dashboard's data supplying reports. Dashboard filters make it easy for users to apply different data perspectives to a single dashboard.

12.1. Create Dashboard

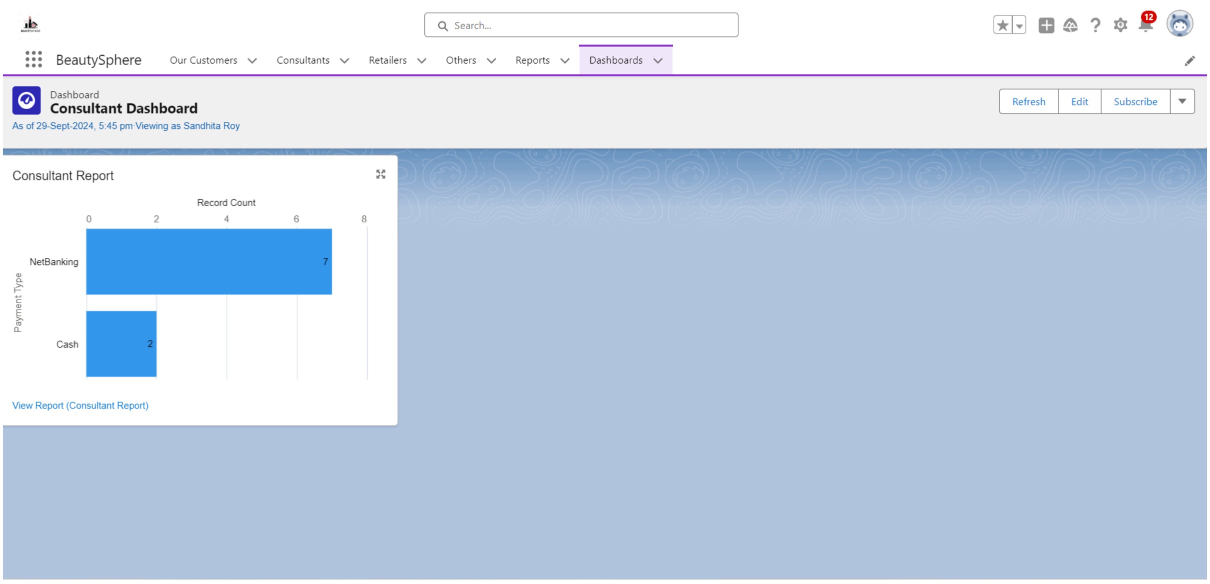
Here’s a step-by-step guide to creating a dashboard in the BeautySphere application:

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

4. **Add Components to the Dashboard**:
    - Click on "**+ Component**" to add a new component.
    - Select the "**Consultants Report**" you created earlier.
5. **Choose Data Visualization**:
    - Pick a visualization type (e.g., chart, table) that best suits your data and needs.
    - Click "**Add.**"



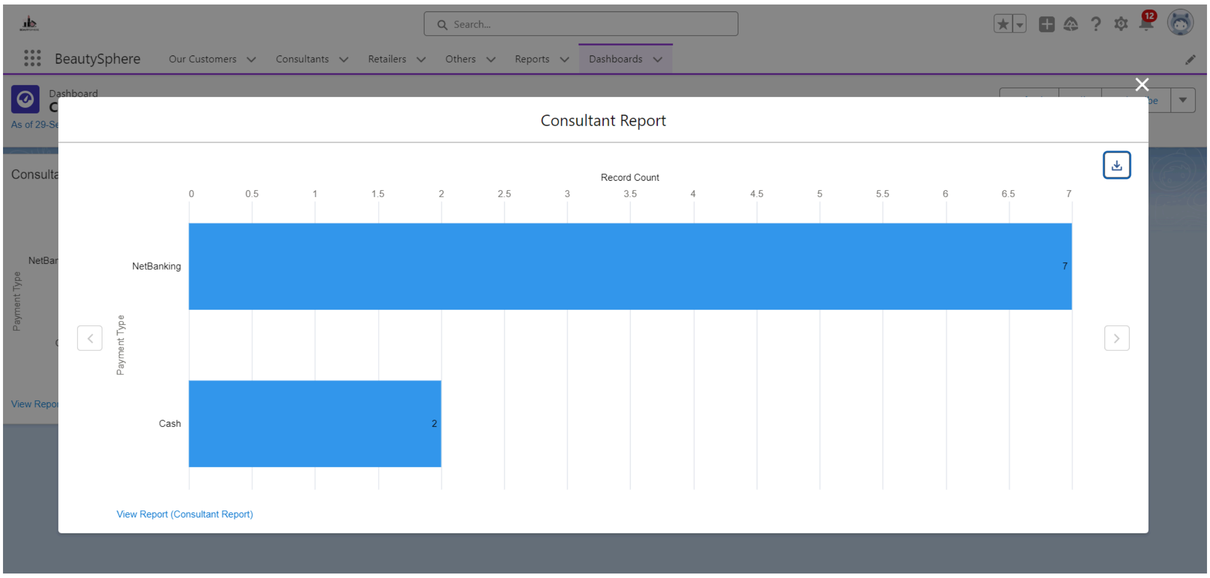
6. **Save Your Dashboard**:
    - After configuring the components and visualizations, click "**Save**" to finalize your dashboard.



12.2. View Dashboard

To view the dashboard, follow these steps:

1. **Open the App Launcher**:
    - Click on the **App Launcher** icon on the left side of the screen.
2. **Search for the Dashboard**:
    - Type "Candidate Internal Result Card" into the search bar.
    - Click on the "**Candidate Internal Result Card**" option that appears.
3. **Navigate to the Dashboard Tab**:
    - Once in the Candidate Internal Result Card view, click on the "**Dashboard**" tab.
4. **View the Graph**:
    - Click on the "**Candidate Internal Result Card**" to see the graph view of the records.



CONCLUSION

The development of the BeautySphere Cosmetics Store Management platform has been a rewarding experience that combined both technical and business knowledge. Understanding the unique needs of cosmetics retailers—such as inventory management, sales tracking, customer relationship management, and data-driven decision-making—was critical to building a comprehensive solution. By focusing on enhancing operational efficiency, customer engagement, and scalability, we were able to deliver a system that not only met but exceeded the requirements of modern cosmetic stores.

Leveraging Salesforce’s core functionalities, including custom objects, workflows, and automation tools, we configured the platform to seamlessly integrate product management, customer interactions, and sales tracking. Moreover, incorporating real-time analytics empowered store owners to make data-driven decisions, improving overall business outcomes. The process of integrating with external systems, such as payment gateways, further added complexity, which was overcome through research, testing, and collaboration with available resources.

This project provided invaluable insights into problem-solving, particularly in configuring intricate relationships between business entities, ensuring accurate inventory management, and streamlining workflows. By fully utilizing Salesforce’s capabilities and applying industry best practices, we successfully developed a solution that can drive growth for cosmetics stores. Ultimately, this project deepened our understanding of cloud-based platforms and their potential to revolutionize retail management.