

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.

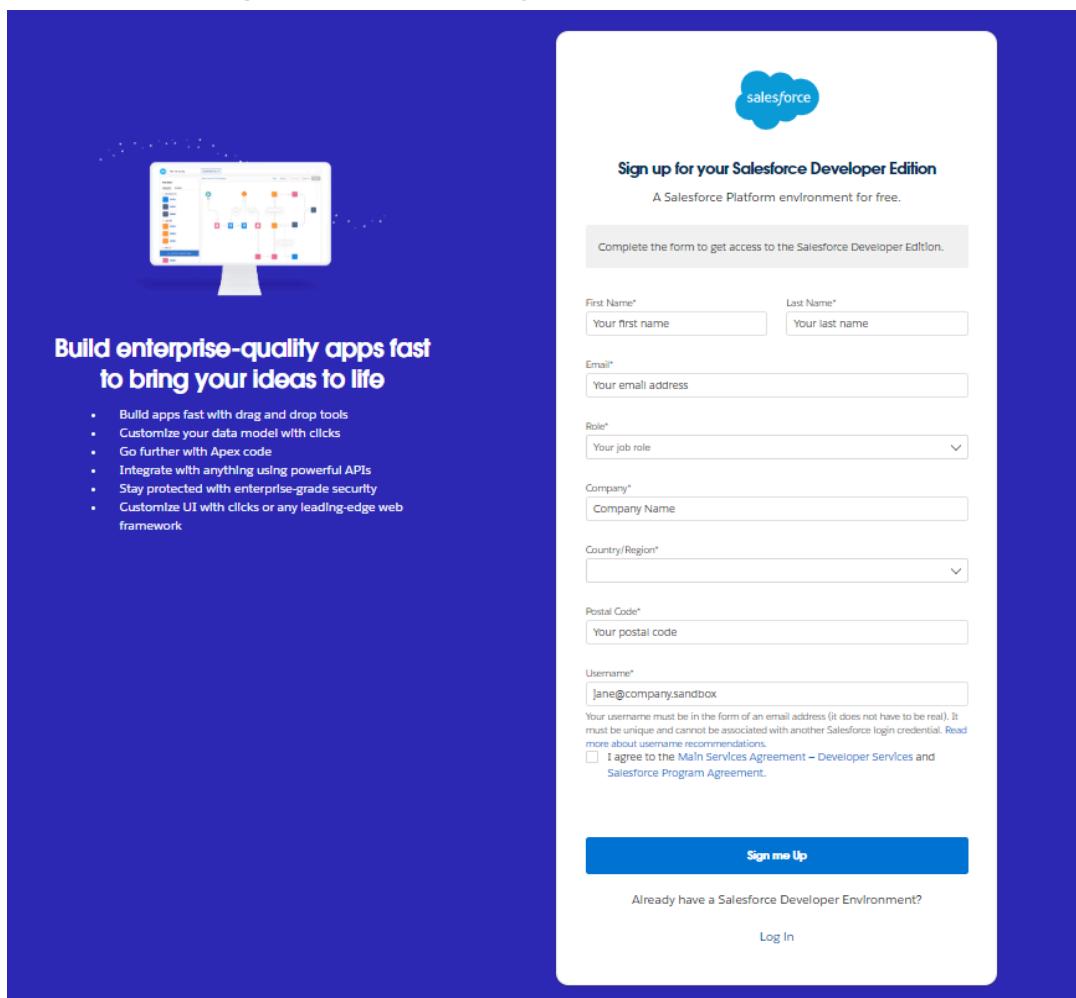
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1. Creation of Salesforce Org

Step 1: Sign Up for a Developer Org

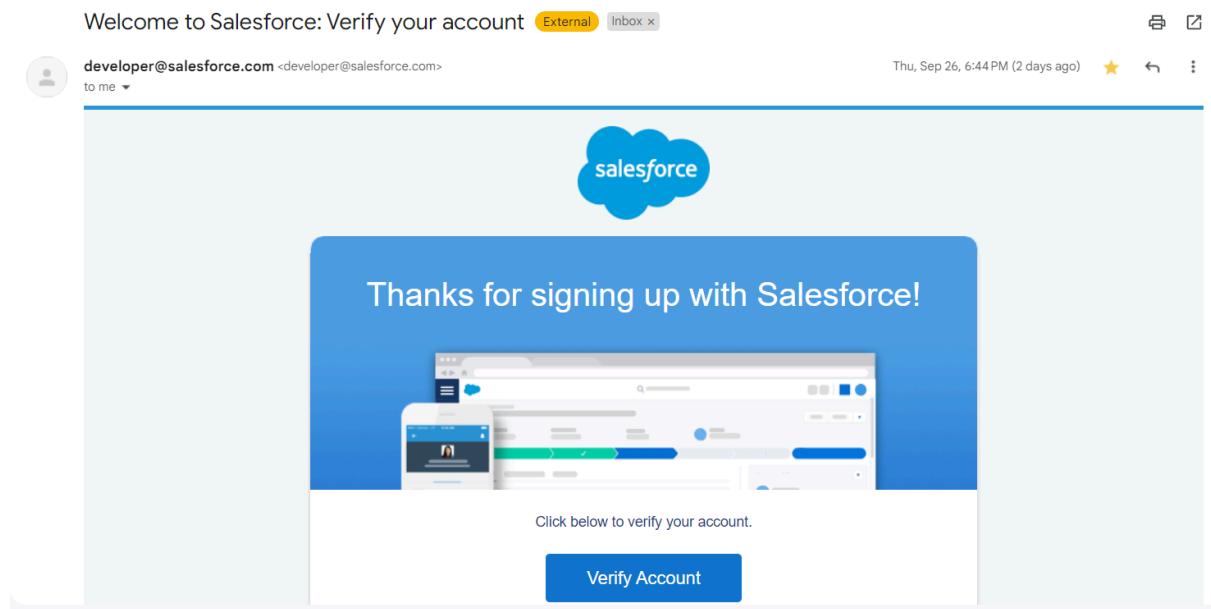
1. Go to developers.salesforce.com/signup.
2. Click on "Sign Up."
3. Fill out the Sign-Up Form with the following details:
 - **First Name & Last Name**
 - **Email**
 - **Role:** Developer
 - **Company:** [Your College Name]
 - **Country:** India
 - **Postal Code:** [Your Pin Code]
 - **Username:** Create 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.



The image shows a screenshot of the Salesforce Developer Edition sign-up page. The page has a white background with a blue header featuring the Salesforce logo. The main heading is "Sign up for your Salesforce Developer Edition" followed by the subtext "A Salesforce Platform environment for free." Below this, there is a form with various input fields: "First Name*" and "Last Name*", both with placeholder text "Your first name" and "Your last name". There is also an "Email*" field with placeholder "Your email address". The "Role*" field is a dropdown menu with "Your job role" as the placeholder. The "Company*" field has "Company Name" as the placeholder. The "Country/Region*" field is a dropdown menu. The "Postal Code*" field has "Your postal code" as the placeholder. The "Username*" field contains "jane@company.sandbox". A small note below it says: "Your username must be in the form of an email address (it does not have to be real). It must be unique and cannot be associated with another Salesforce login credential. Read more about username recommendations." There is a checkbox for "I agree to the [Master Services Agreement – Developer Services](#) and [Salesforce Program Agreement](#)". At the bottom of the form is a large blue "Sign me Up" button. Below the button, there is a link "Already have a Salesforce Developer Environment?" and a "Log In" link.

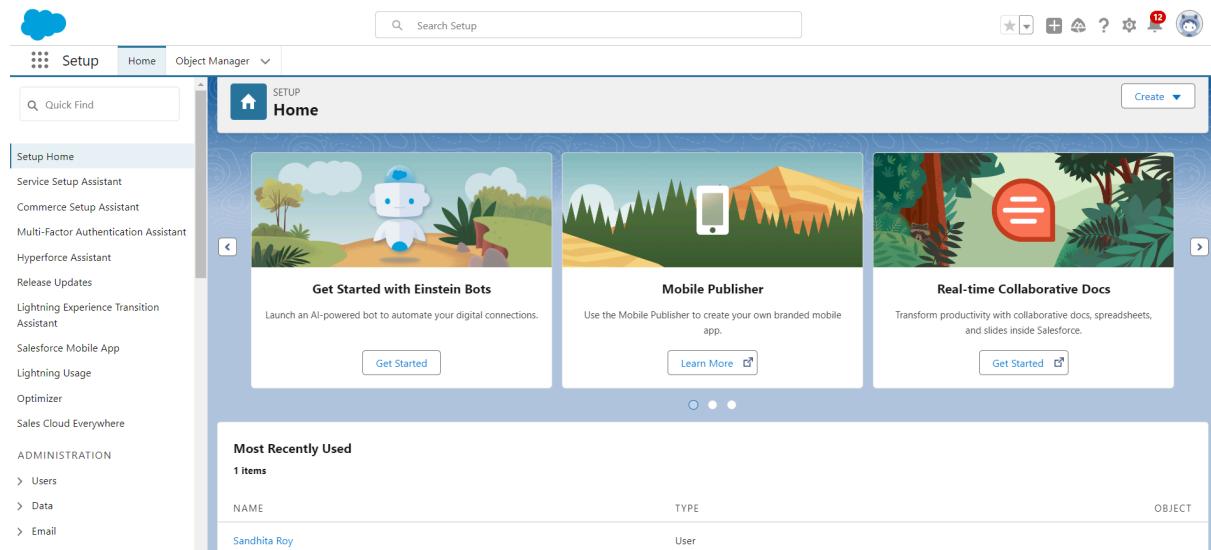
Step 2: Sign Up for a Developer Org

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.

Object Manager
Our Customer

Details

Description

API Name
Our_Customer__c

Custom
✓

Singular Label
Our Customer

Plural Label
Our Customers

Enable Reports
✓

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

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**.

SETUP

Tabs

Custom Object Tab
Our Customers

Custom Tab Definition Detail

	Tab Label	Object	Tab Style
Edit	Our Customers	Our Customer	People
Description	Sandhita Roy, 28/09/2024, 9:23 pm	Splash Page Custom Link	Modified By Sandhita Roy, 28/09/2024, 9:23 pm
Created By	Sandhita Roy		

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

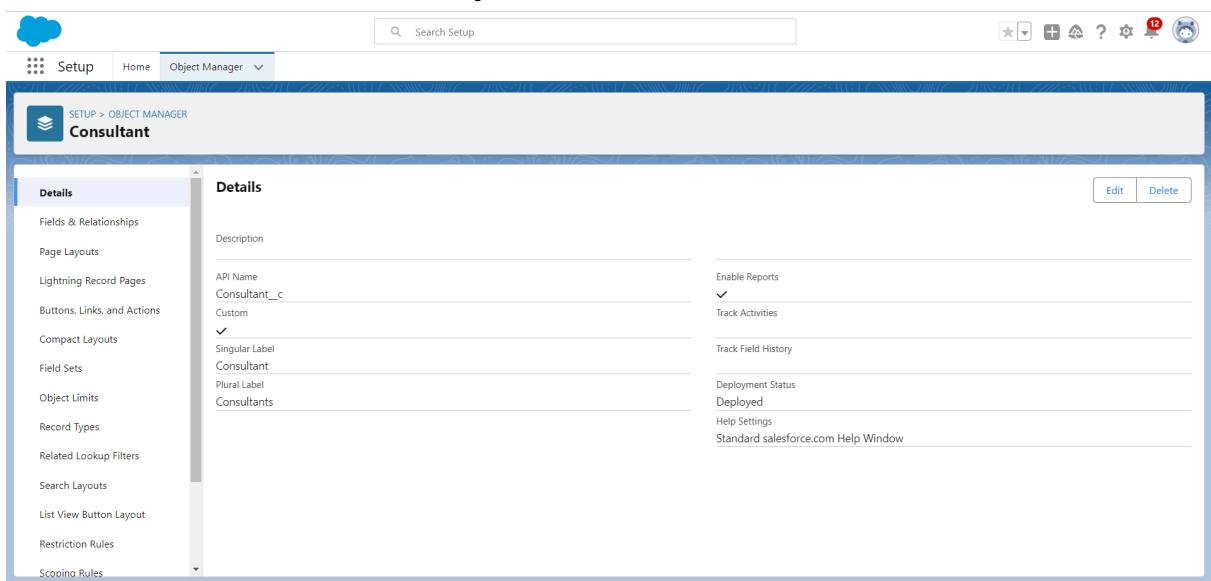
1. Click on the "**Object Manager**" tab located next to the Home tab.

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**.

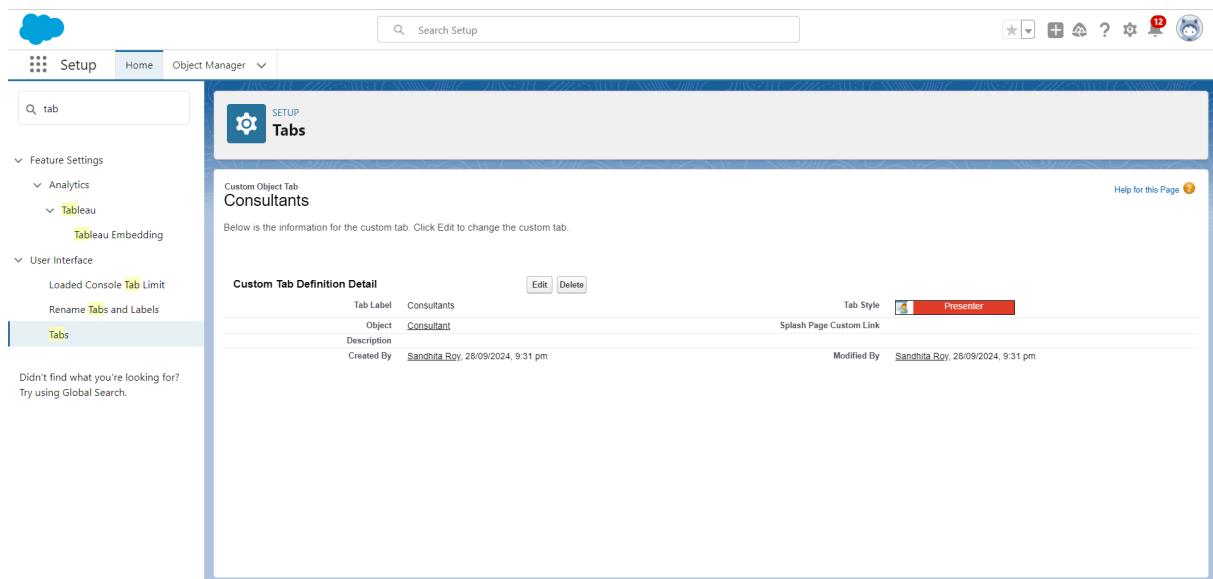
Step 4: Create "Consultants" Object

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

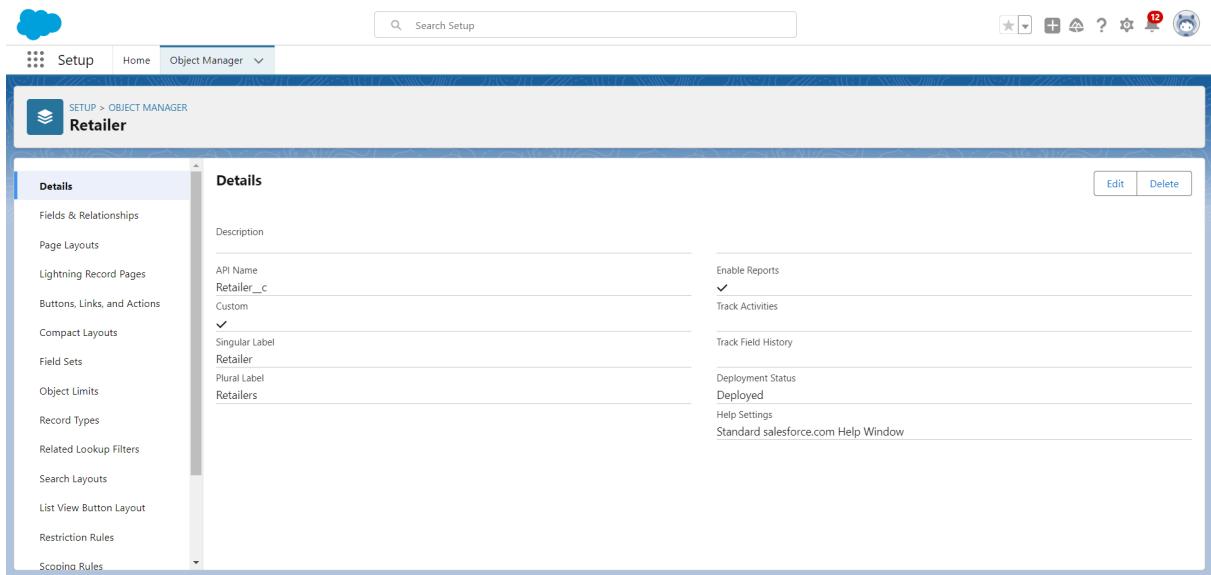
1. Click on the "**Object Manager**" tab located next to the Home tab.

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**.

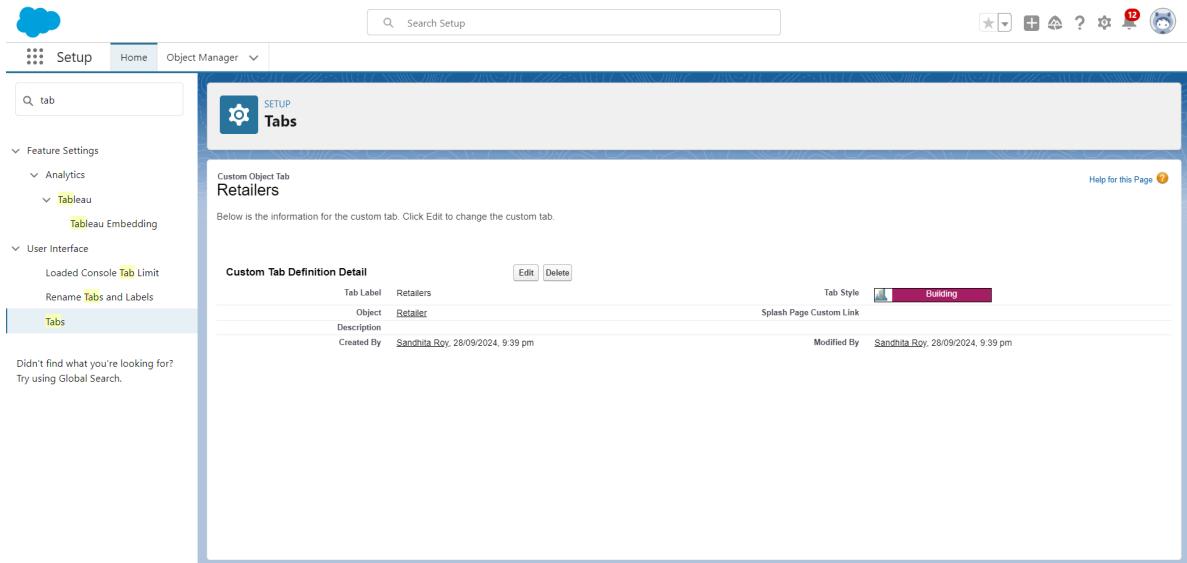
Step 4: Create "Retailers" Object

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.

The screenshot shows the Salesforce Setup interface under the Object Manager. A sidebar on the left lists various object configuration options like Fields & Relationships, Page Layouts, and Buttons. The main panel displays the 'Details' for the 'Other' object. The API Name is set to 'Other__c'. Under the 'Custom' section, the Singular Label is 'Other' and the Plural Label is 'Others'. On the right, there are sections for Reports, Activities, Field History, Deployment Status, and Help Settings.

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**.

The screenshot shows the Salesforce Setup interface under the 'Tabs' section. A search bar on the left finds 'tab'. The main area shows a 'Custom Object Tab' for 'Others'. The tab label is 'Others', the object is 'Other', and the tab style is 'Cell phone'. It was created by Sandhita.Roy on 28/09/2024 at 9:46 pm.

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.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main area is titled 'SETUP > OBJECT MANAGER Consultant'. On the left, a sidebar lists various configuration options under 'Page Layouts'. The central area displays a table titled 'Page Layouts' with one item: 'Consultant Layout'. The table has columns for 'PAGE LAYOUT NAME', 'CREATED BY', and 'MODIFIED BY'. The 'Consultant Layout' row shows it was created by 'Sandhita Roy' on '28/09/2024, 9:28 pm' and modified by 'Sandhita Roy' on '29/09/2024, 10:36 am'. A 'Quick Find' search bar and 'New' and 'Page Layout Assignment' buttons are at the top right of the table area.

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

The screenshot shows the Salesforce Page Layout editor for the 'Consultant' object. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main area is titled 'SETUP > OBJECT MANAGER Consultant'. On the left, a sidebar lists various configuration options under 'Page Layouts'. The central area shows the 'Fields' section of the layout editor. Fields listed include 'Customer id', 'Customer name', 'Mobile Number', 'Delivery Type', 'Address', 'Email id', 'Products', 'Payment', 'Customer Details', 'Owner', and 'Last Modified By'. The 'Address' field is highlighted with a yellow background. At the bottom of the editor, there are tabs for 'Information', 'System Information', and 'Custom Links', each with their respective header visible on edit only.

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:

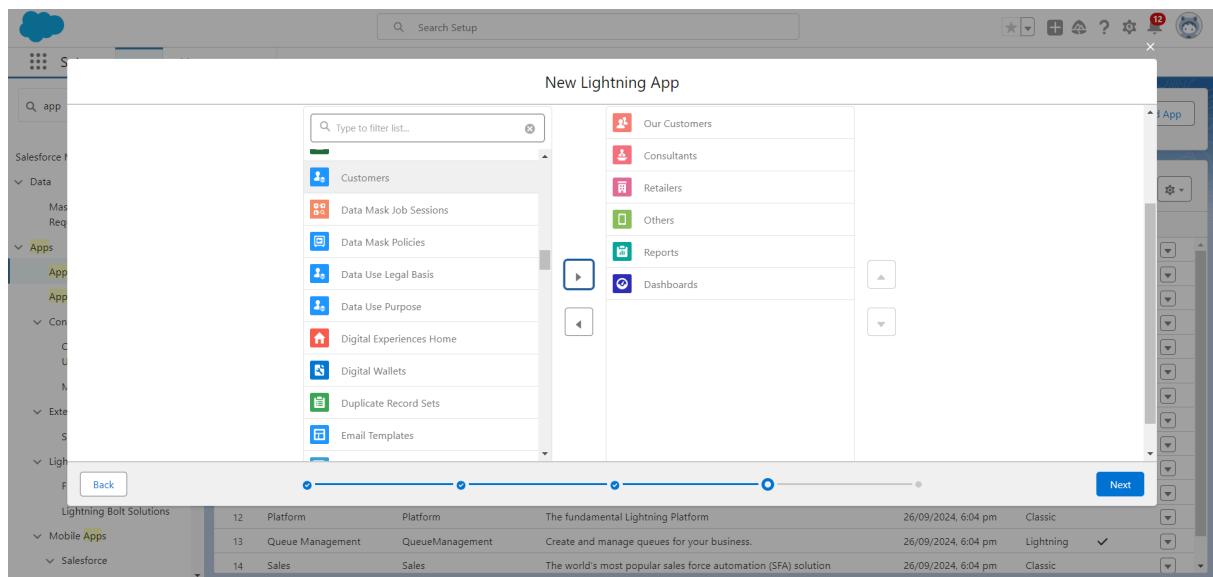
1. Go to the **Setup** page.
2. In the Quick Find search bar, type “App Manager” and select “**App Manager**.”
3. Click on **New Lightning App**.
 - Fill the app name as **BeautySphere** in App Details and Branding.
 - Click **Next**.
 - On the App Options page, keep the settings as default.
 - Click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

The screenshot shows the Salesforce App Manager interface. The left sidebar has a tree view with categories like Apps, Connected Apps, External Client Apps, and Mobile Apps. The 'Apps' section is expanded, showing 'App Manager' which is selected. The main content area is titled 'Lightning Experience App Manager' and displays a table of 22 items. The table columns are: App Name, Developer Name, Description, Last Modified Date, App Type, and Visibility. The table shows various apps like All Tabs, Analytics Studio, App Launcher, Automation, Bolt Solutions, Community, Content, Data Manager, Digital Experiences, Lightning Usage App, Marketing CRM Classic, Platform, Queue Management, and Sales. Most apps are listed as 'Classic' type, except for a few like Bolt Solutions, Marketing CRM Classic, and Platform which are 'Lightning' type. The 'Last Modified Date' column shows all entries were modified on 26/09/2024, 6:04 pm.

App Name	Developer Name	Description	Last Modified Date	App Type	Visibility
All Tabs	AllTabSet		26/09/2024, 6:04 pm	Classic	✓
Analytics Studio	Insights	Build CRM Analytics dashboards and apps	26/09/2024, 6:04 pm	Classic	✓
App Launcher	AppLauncher	App Launcher tabs	26/09/2024, 6:04 pm	Classic	✓
Automation	FlowsApp	Automate business processes and repetitive tasks.	26/09/2024, 6:07 pm	Lightning	✓
Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	26/09/2024, 6:06 pm	Lightning	✓
Community	Community	Salesforce CRM Communities	26/09/2024, 6:04 pm	Classic	✓
Content	Content	Salesforce CRM Content	26/09/2024, 6:04 pm	Classic	✓
Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	26/09/2024, 6:04 pm	Lightning	✓
Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	26/09/2024, 6:04 pm	Lightning	✓
Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	26/09/2024, 6:04 pm	Lightning	✓
Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	26/09/2024, 6:04 pm	Classic	✓
Platform	Platform	The fundamental Lightning Platform	26/09/2024, 6:04 pm	Classic	✓
Queue Management	QueueManagement	Create and manage queues for your business.	26/09/2024, 6:04 pm	Lightning	✓
Sales	Sales	The world's most popular sales force automation (SFA) solution	26/09/2024, 6:04 pm	Classic	✓

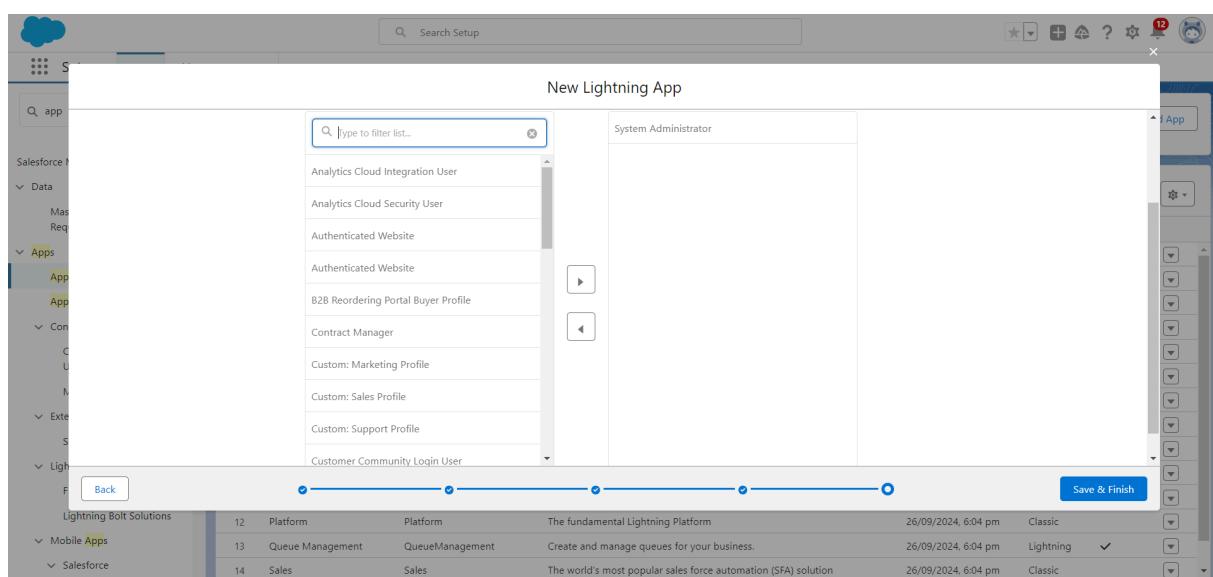
To Add Navigation Items:

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**.



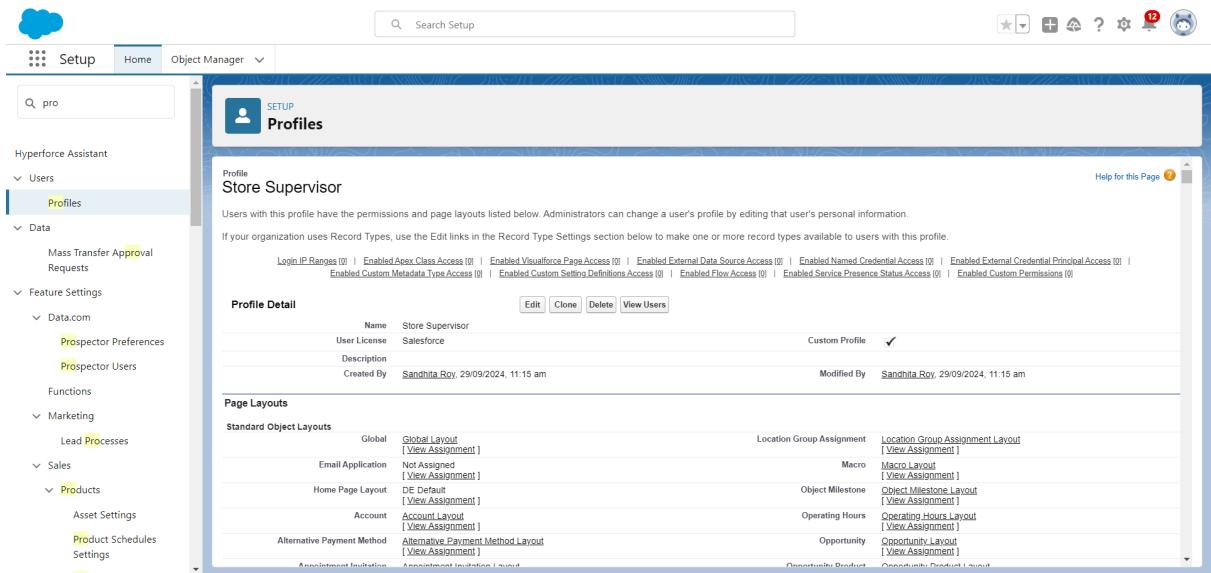
6.Profile

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**.

Profiles

Custom Object Permissions

	Basic Access	Create	Edit	Delete	View All	Modify All	Basic Access	Create	Edit	Delete	View All	Modify All
Consultants	<input checked="" type="checkbox"/>											
Others	<input checked="" type="checkbox"/>											

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Custom App Settings

App	Visible	Default	App	Visible	Default
All Tabs (standard_AllTabSet)	<input checked="" type="checkbox"/>	<input type="radio"/>	Queue Management (standard_QueueManagement)	<input checked="" type="checkbox"/>	<input type="radio"/>
Analytics Studio (standard_Insights)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard_LightningSales)	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard_AppLauncher)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard_Sales)	<input checked="" type="checkbox"/>	<input type="radio"/>
Automation (standard_FlowsApp)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales Console (standard_LightningSalesConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>
BeautySphere (BeautySphere)	<input type="checkbox"/>	<input checked="" type="radio"/>	Salesforce Chatter (standard_Chatter)	<input checked="" type="checkbox"/>	<input type="radio"/>
Bolt Solutions (standard_LightningBolt)	<input checked="" type="checkbox"/>	<input type="radio"/>	Salesforce Scheduler Setup (standard_LightningScheduler)	<input type="checkbox"/>	<input type="radio"/>
Community (standard_Community)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sample Console (standard_ServiceConsole)	<input type="checkbox"/>	<input type="radio"/>
Content (standard_Content)	<input checked="" type="checkbox"/>	<input type="radio"/>	Service (standard_Service)	<input checked="" type="checkbox"/>	<input type="radio"/>
Data Manager (standard_DataManager)	<input checked="" type="checkbox"/>	<input type="radio"/>	Service Console (standard_LightningService)	<input checked="" type="checkbox"/>	<input type="radio"/>
Digital Experiences (standard_SalesforceCMS)	<input checked="" type="checkbox"/>	<input type="radio"/>	Site.com (standard_Sites)	<input checked="" type="checkbox"/>	<input type="radio"/>
Lightning Usage App (standard_LightningInstrumentation)	<input checked="" type="checkbox"/>	<input type="radio"/>	Subscription Management (standard_RevenueCloudConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>
Marketing CRM Classic (standard_Marketing)	<input checked="" type="checkbox"/>	<input type="radio"/>	WDC (standard_Work)	<input checked="" type="checkbox"/>	<input type="radio"/>

Similarly, Create an Operator Profile:

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

Billing Operator

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Profile Detail

Name	Billing Operator	Custom Profile	
User License	Salesforce	<input checked="" type="checkbox"/>	
Description			
Created By	Sandhita Roy, 29/09/2024, 11:36 am	Modified By	Sandhita Roy, 29/09/2024, 11:40 am

Page Layouts

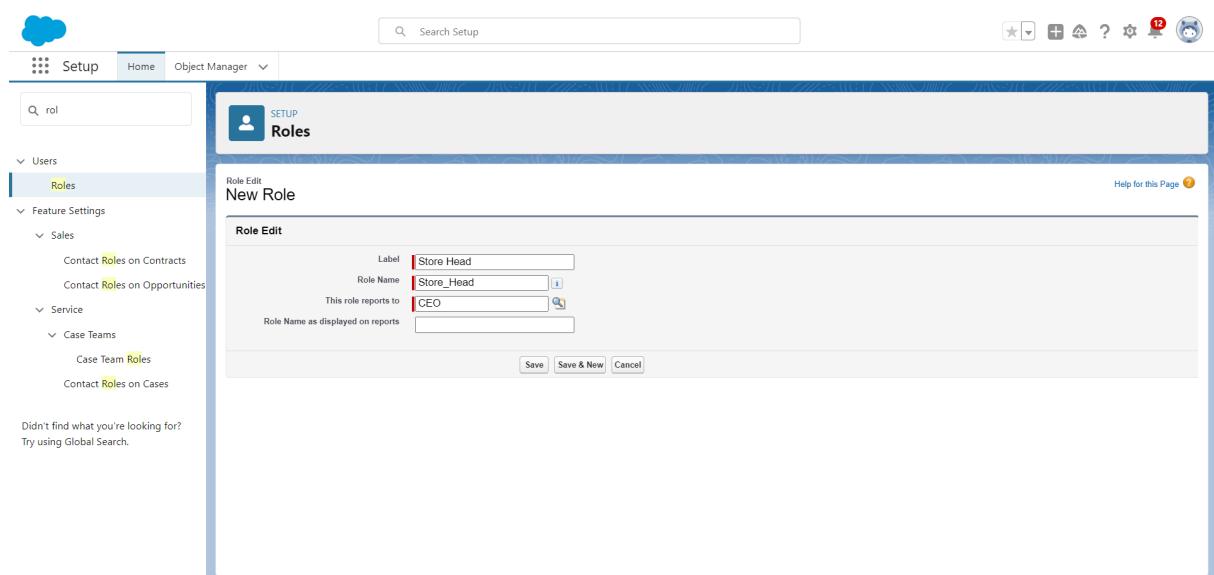
Standard Object Layouts	Global	Location Group Assignment
Email Application	Not Assigned [View Assignment]	Macro [View Assignment]
Home Page Layout	DE Default [View Assignment]	Object Milestone [View Assignment]
Account	Account Layout [View Assignment]	Operating Hours [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Opportunity [View Assignment]

7. Setup Roles

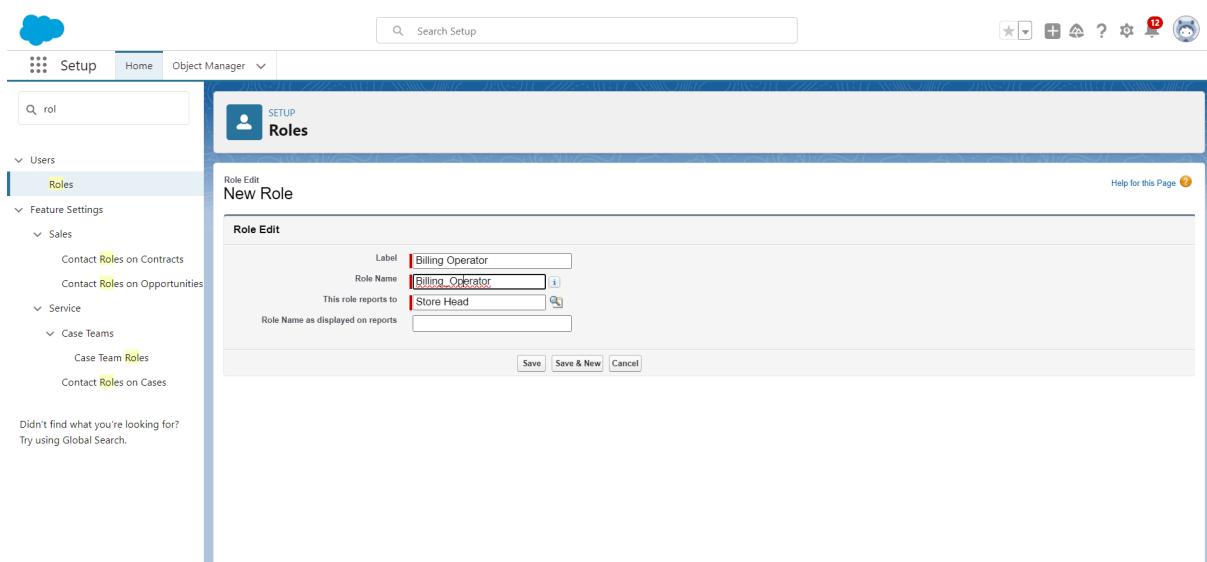
Roles are record-level access controls that define what data a user can see in Salesforce.

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**.

User Sam J

User Detail

Name	Sam J	Role	Store Head
Alias	SJ	User License	Salesforce
Email	sj@gmail.com [Verify]	Profile	Store Supervisor
Username	sj567@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User17275908377822567300	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<input type="checkbox"/> View
Delegated Approver		Data.com User Type	<input type="checkbox"/>
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> <input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> <input type="checkbox"/>
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/>

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**.

User Jay Shaw

User Detail

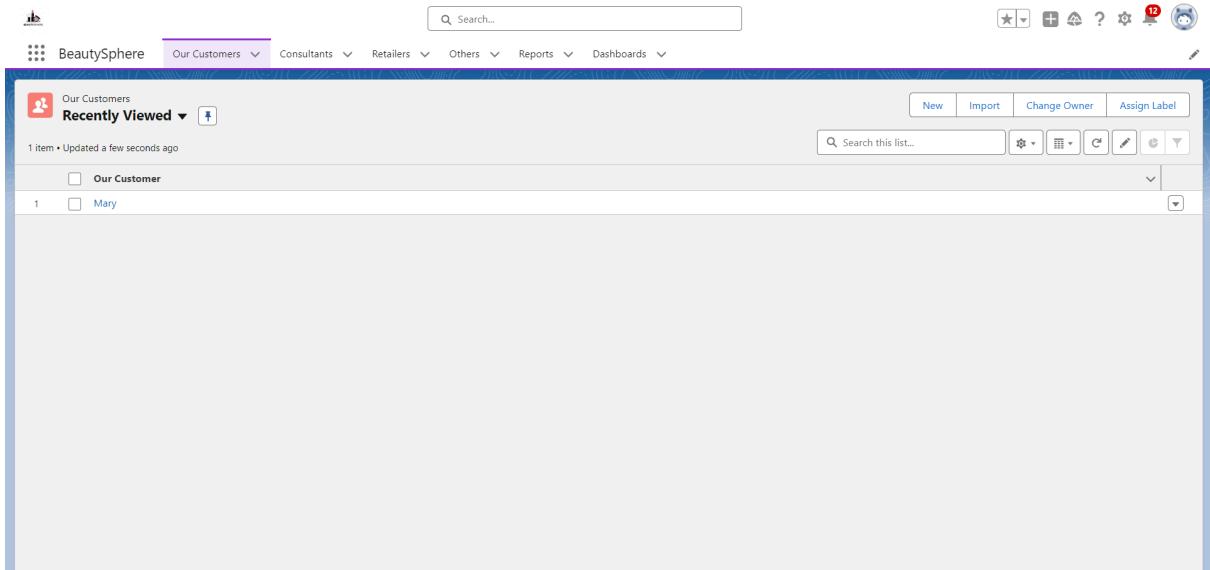
Name	Jay Shaw	Role	Billing Operator
Alias	jshaw	User License	Salesforce Platform
Email	jshaw@gmail.com [Verify]	Profile	Standard Platform User
Username	jshaw12345@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User17275911388704481669	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<input type="checkbox"/> View
Delegated Approver		Data.com User Type	<input type="checkbox"/>
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> <input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> <input type="checkbox"/>
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/>

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.

BeautySphere

Our Customers

Our Customer
Mary

Related Details

Owner: Sandhita Roy

Customer id: C-0001

Customer name: Mary Smith

Mobile Number: 3344556612

Email id: msmith@gmail.com

Address: Texas, US

Additional Information

Created By: Sandhita Roy, 29/09/2024, 12:03 pm

Last Modified By: Sandhita Roy, 29/09/2024, 12:04 pm

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.

BeautySphere

Our Customers

Recently Viewed

2 items + Updated a minute ago

Our Customer

1 Jim

2 Mary

Delete Our Customer

Are you sure you want to delete this Our Customer?

Cancel Delete

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!**

The screenshot shows the Data Import Wizard interface. At the top, there's a search bar labeled "Search Setup". Below it, a navigation bar with tabs: "Setup" (selected), "Home", and "Object Manager". On the right side of the header are various icons for account management. The main area is titled "Data Import Wizard" with a "Recent Import Jobs" section showing columns for Status, Object, Records Created, Records Updated, Records Failed, Start Date, and Processing Time (ms). A prominent button at the bottom left says "Launch Wizard!". Above this button, there are three sections of advice: "Before you import your data...", "Import your data in 3 easy steps!", and a "Bulk API Monitoring" section.

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**.

This screenshot shows the "Choose data" step of the wizard. It has three main sections: "What kind of data are you importing?", "What do you want to do?", and "Where is your data located?".
- In the first section, under "Standard objects", "Consultants" is selected.
- In the second section, "Add new records" is selected.
- In the third section, a CSV file named "Consultant_CSV.csv" is uploaded, and its character code is set to "ISO-8859-1 (General US & Western European, ISO-LATIN-1)". The "Values Separated By" option is set to "Comma".
A progress bar at the top indicates "Getting closer...".

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**.

Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	Customer name	Customer 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	Mumbai	Hyderabad	Delhi
Change	Payment	Payment	Cash	UPI	Credit Card
Change	Email id	Email id		ajith@gmail.com	Babu34@gmail.com
Change	Products	Products	Lipstick	Compact	FacePack

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

Review & Start Import
Review your import information and click Start Import.

Your selections:
Consultants ✓
Add new records ✓
Consultant_CS1.csv ✓

Your import will include:
Mapped fields 7

Your import will not include:
Unmapped fields 0

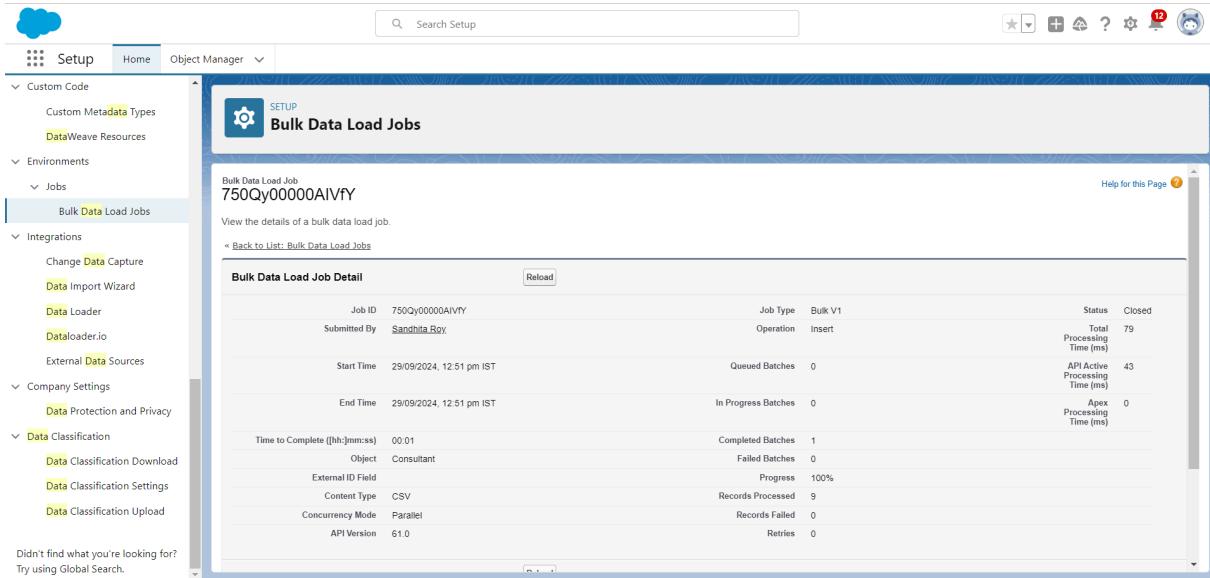
Great job!

9. Click **OK** on the popup.

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

OK

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



The screenshot shows the Bulk Data Load Jobs page in the Salesforce Setup. The left sidebar is expanded, showing the Bulk Data Load Jobs section under the Jobs category. The main content area displays a table for the Bulk Data Load Job with Job ID 750Qy00000AIVFY. The job was submitted by Sanchita Roy and started at 29/09/2024, 12:51 pm IST. It completed at 29/09/2024, 12:51 pm IST, taking 00:01. The job type is Bulk V1 Operation Insert, and the status is Closed. The total processing time was 79 ms. The table also shows 0 queued batches, 0 in progress batches, 1 completed batch, 0 failed batches, 100% progress, 9 records processed, 0 records failed, and 0 retries.

Job ID	Submitted By	Job Type	Status
750Qy00000AIVFY	Sanchita Roy	Bulk V1 Operation Insert	Closed
Start Time	End Time	In Progress Batches	Total Processing Time (ms)
29/09/2024, 12:51 pm IST	29/09/2024, 12:51 pm IST	0	79
Time to Complete ([hh:]mm:ss)	Object	Completed Batches	API Active Processing Time (ms)
00:01	Consultant	1	43
External ID Field	Content Type	Failed Batches	Apex Processing Time (ms)
	CSV	0	0
Concurrency Mode	Records Processed	Progress	
Parallel	9	100%	
API Version	Records Failed	Retries	
61.0	0	0	

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:

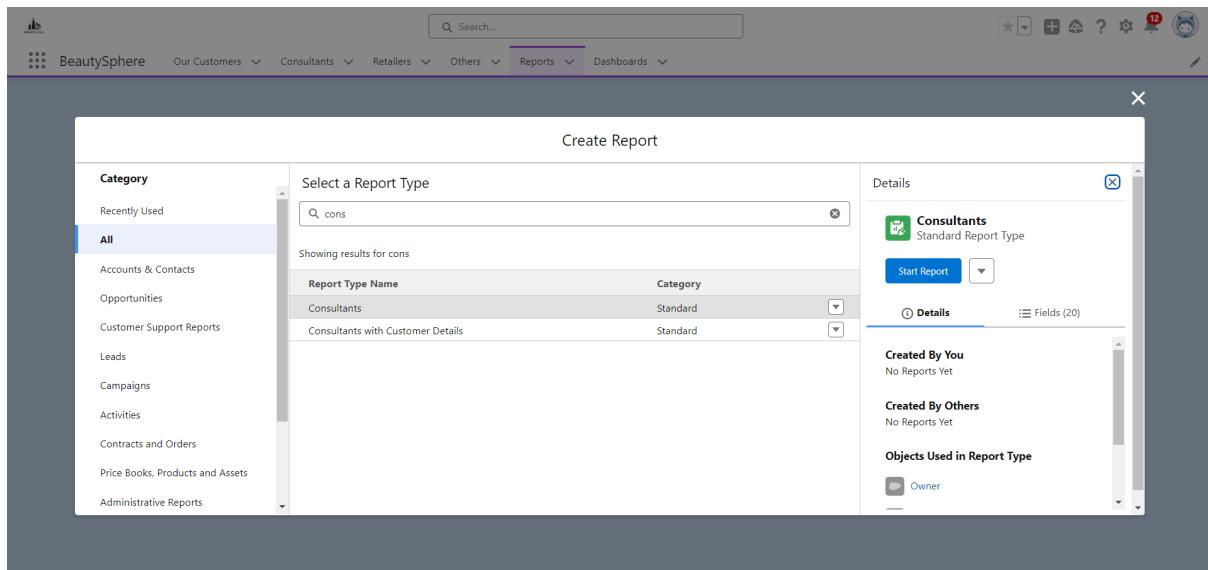
- Users can view and modify the reports and move them to/from any other folders they have access to as Editor or Manager.

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**.

	Customer name	Delivery Type	Products	Payment
NetBanking (7)	Ajith	Courier	Compact	UPI
	Babu	Self Pickup	FacePack	Credit Card
	Chitra	Courier	Eyeliner	Card
	Swathi	Courier	Nail Polish	UPI
	Prasad	Self Pickup	Eyeliner	UPI
	Ajay Kumar	Courier	Lip Balm	Card
	Sandeep	Courier	Eyeliner	UPI
Subtotal				
Cash (2)	Dev Raj	Self Pickup	Lipstick	Cash
	Shankar	Self Pickup	FacePack	Cash
Subtotal				
Total (9)				

	Customer name	Delivery Type	Products	Payment
NetBanking (7)	Ajith	Courier	Compact	UPI
	Babu	Self Pickup	FacePack	Credit Card
	Chitra	Courier	Eyeliner	Card
	Swathi	Courier	Nail Polish	UPI
	Prasad	Self Pickup	Eyeliner	UPI
	Ajay Kumar	Courier	Lip Balm	Card
	Sandeep	Courier	Eyeliner	UPI
Subtotal				
Cash (2)	Dev Raj	Self Pickup	Lipstick	Cash
	Shankar	Self Pickup	FacePack	Cash
Subtotal				
Total (9)				

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.

The screenshot shows the BeautySphere application's interface. At the top, there is a navigation bar with links for 'Our Customers', 'Consultants', 'Retailers', 'Others', 'Reports' (which is currently selected), and 'Dashboards'. Below the navigation bar is a search bar labeled 'Search...'. On the far right of the header are various icons for account management and notifications. The main content area is titled 'Reports' and 'Recent'. It displays a table with one item: 'Consultant Report' under 'Report Name', 'Private Reports' under 'Folder', 'Sandhita Roy' under 'Created By', and '29/9/2024, 1:23 pm' under 'Created On'. To the left of the table is a sidebar with categories: 'RECENT' (which is selected), 'Created by Me', 'Private Reports', 'Public Reports', 'All Reports', 'FOLDERS' (with 'All Folders'), 'Created by Me', 'Shared with Me', 'FAVORITES' (with 'All Favorites').

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:

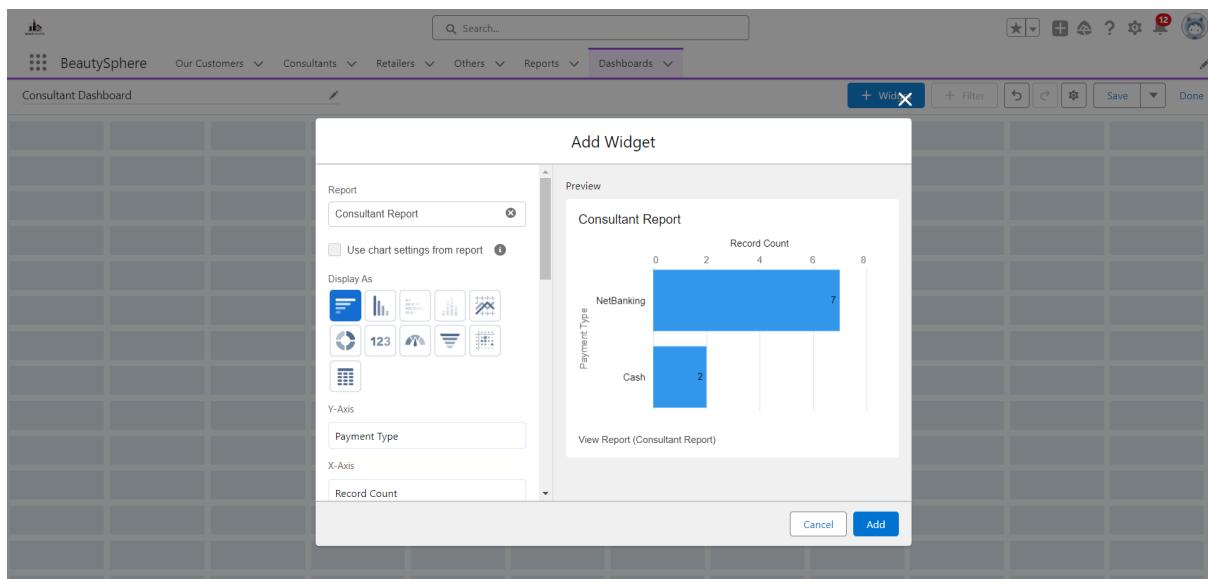
1. **Open the BeautySphere Application:** Launch the application and navigate to the **Dashboards** tab.
2. **Create a New Dashboard:**
 - Click on the "New Dashboard" button.
3. **Name Your Dashboard:**
 - Enter "**Consultant Dashboard**" in the name field.
 - Click "**Create.**"

4. Add Components to the Dashboard:

- Click on "+ Component" to add a new component.
- Select the "Consultants Report" you created earlier.

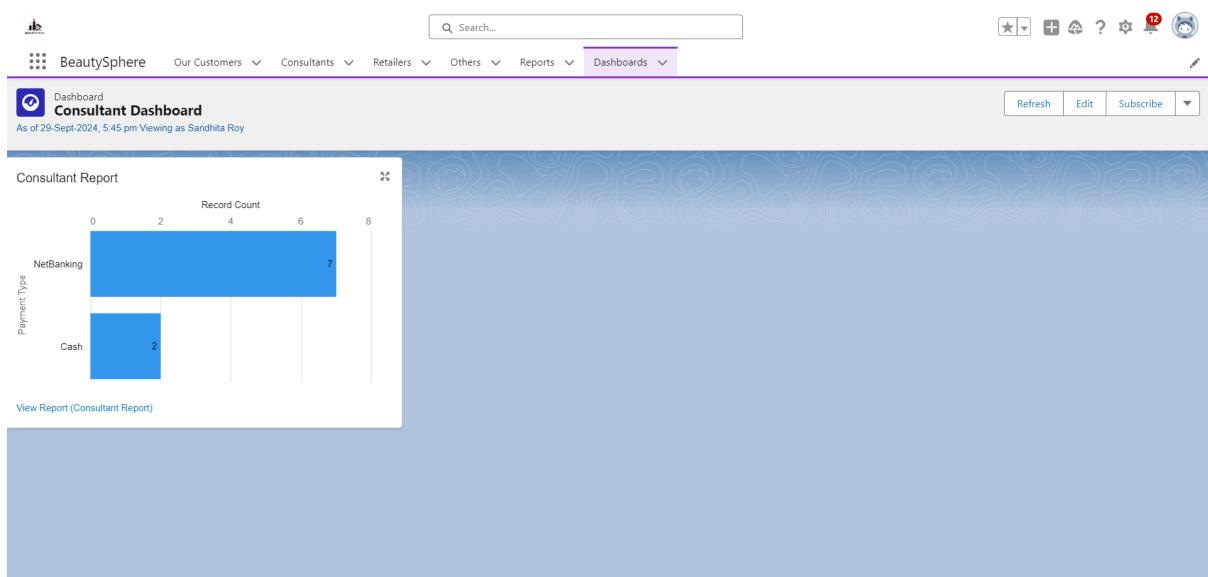
5. Choose Data Visualization:

- 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:

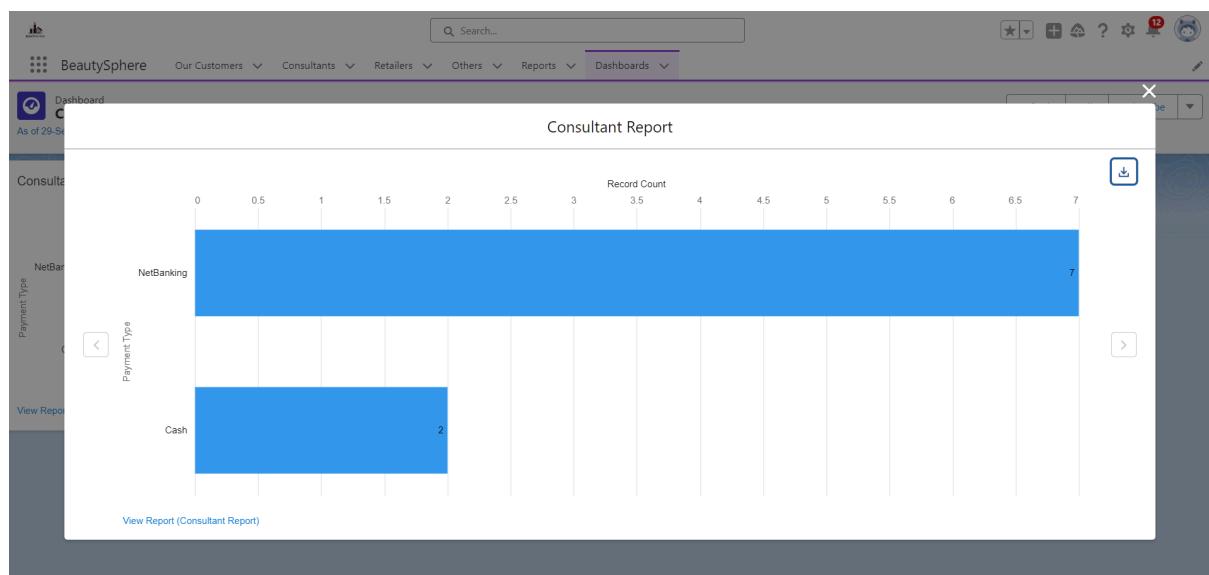
- Type "Candidate Internal Result Card" into the search bar.
- Click on the "**Candidate Internal Result Card**" option that appears.

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.