Cosmetics Store Management

Project Description:

The Cosmetics Store Management project aims to design and implement a comprehensive system for managing daily operations of a cosmetics store.This system will streamline inventory management, sales tracking, customer relationships.

The system will provide real-time reporting and analytics for informed decision-making.A user-friendly interface will ensure ease of use for store staff.The project will utilize [database] to ensure scalability and reliability.The goal is to enhance operational efficiency, customer satisfaction, and overall business performance.

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.

Project Flow:

In this project you can do hands on practice the configuration as well as customization with the Data modelling,App building,User Adaption & Apex Code.

1.Creation of Salesforce org
2.Object Creation
3.Fields And Relationship
4.Page Layout
5.Lightning App
6.Creating Profiles
7.Setup Roles
8.Creation of Users
9.User Adoption
10.Importing Data
11.Accessing Reports
12.Working With Dashboards

1.Creation Of Salesforce org

Creating a developer org in salesforce.

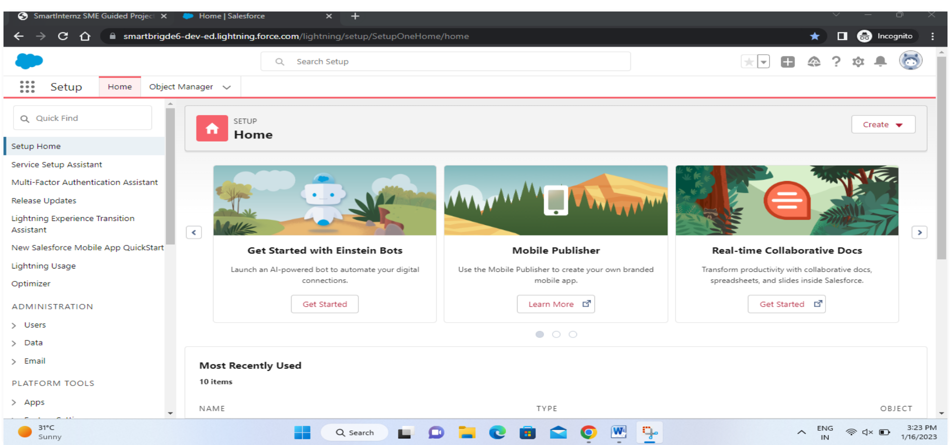
1. Go to developers.salesforce.com/signup.
2. Click on sign up.
3. On the sign up form, enter the following details :
1. First name & Last name
2. Email
3. Role : Developer
4. Company : College Name
5. County : India
6. Postal Code : pin code
7. Username

Account Activation

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

Login To Your Salesforce Account

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



Salesforce Login

htttps://login.salesforce.com

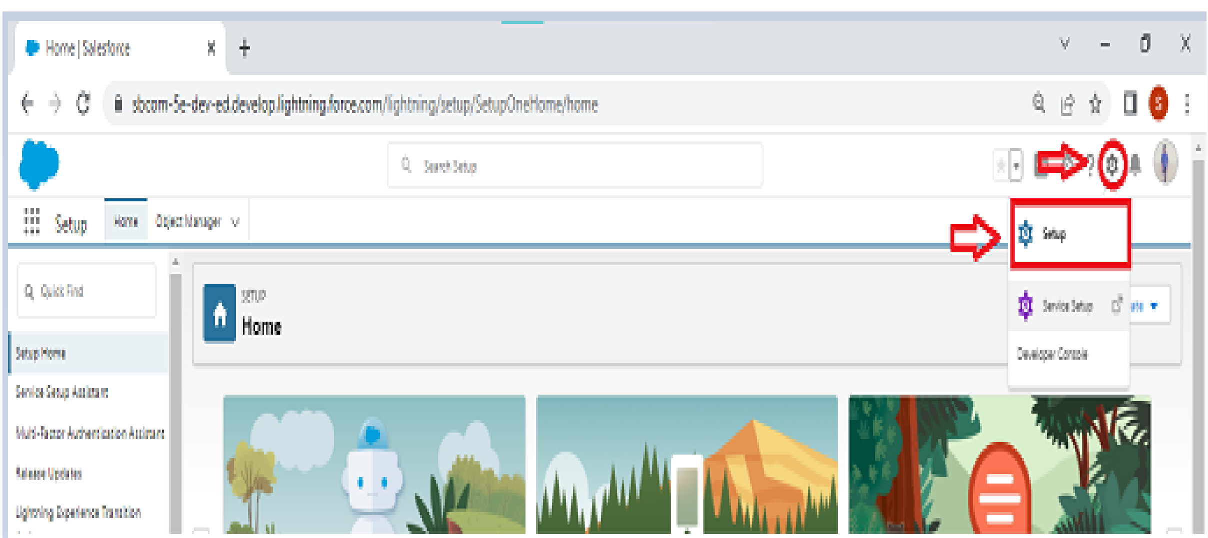
2.Object Creation

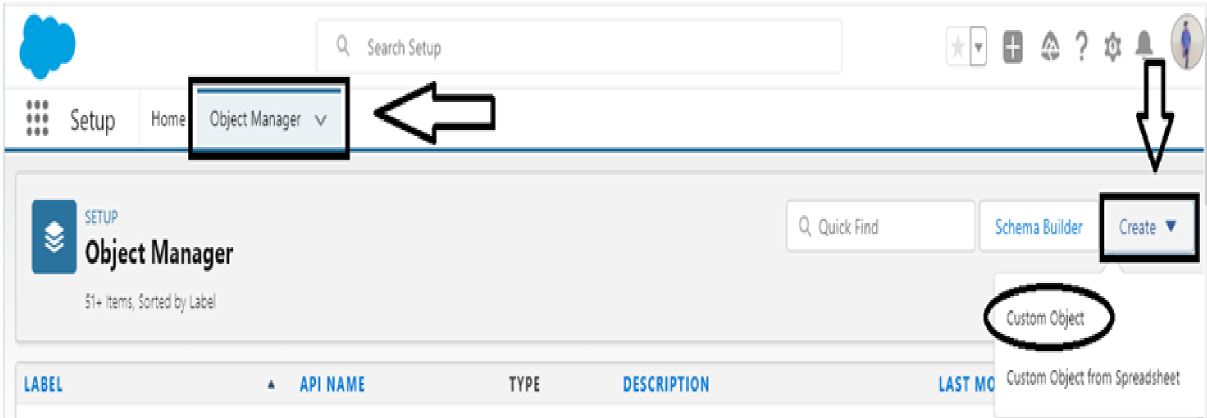
Creation of Objects for Urban Color, For this Urban Color we need to create 3 objects i.e.,Our Customers,Consultants,Retailers,others.
The below steps will assist you in creating those objects.

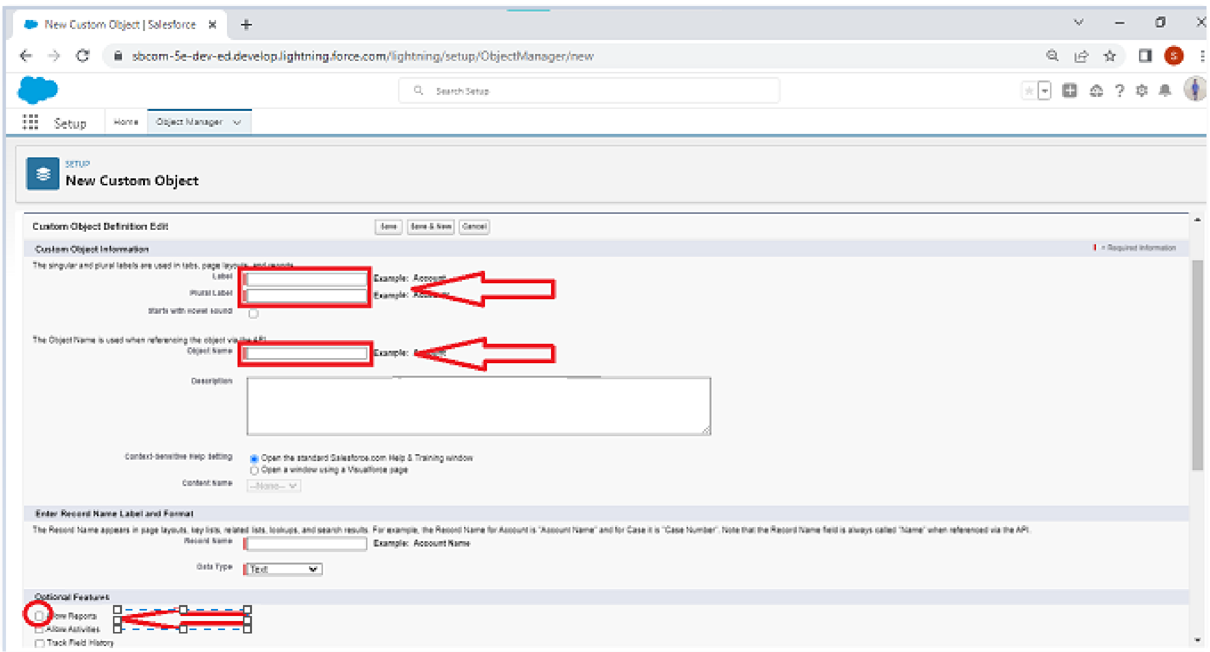
- Click on the gear icon and then select Setup.
- Click on the object manager tab just beside the home tab.
- After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
- Creation of Our Customer Object

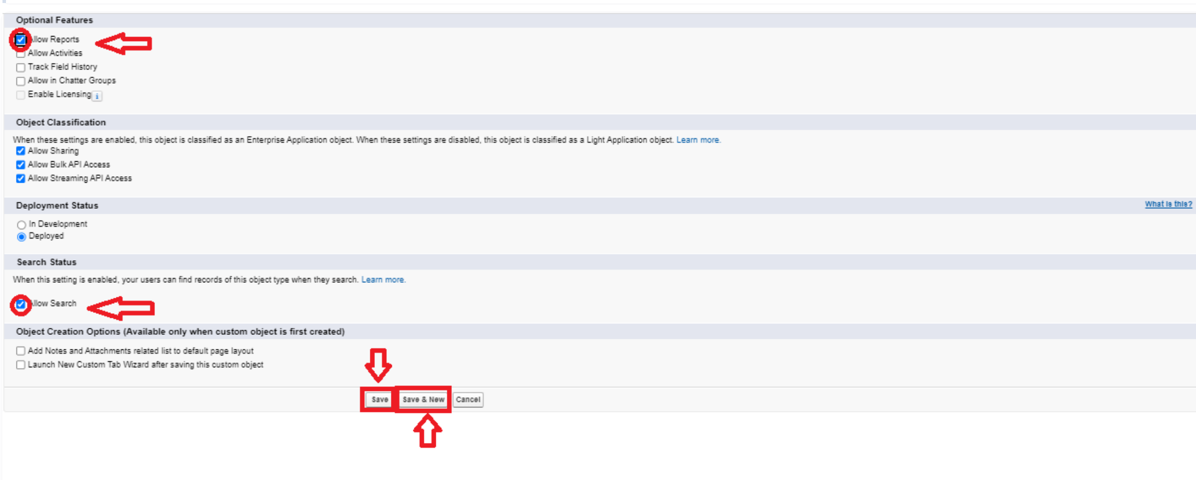
On the Custom Object Definition page, create the object as follows:

- Label: Our Customer
- Plural Label: Our Customers
- Record Name: Our Customer
- Check the Allow Reports checkbox
- Check the Allow Search checkbox
- Click Save.
- Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs.
- Under Custom Object Tabs, click New.
- For Object, select Our Customer.
- For Tab Style, select any icon.
- Leave all defaults as is. Click Next, Next, and Save.




Search Setup
Setup
Home
Object Manager
SETUP
Object Manager
51+ Items, Sorted by Label
Quick Find
Schema Builder
Create
Custom Object
Custom Object from Spreadsheet
LABEL
API NAME
TYPE
DESCRIPTION
LAST MO


New Custom Object | Salesforce
sbcom-5e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new
Search Setup
Setup
Home
Object Manager
SETUP
New Custom Object
Custom Object Definition Edit
Save
Save & New
Cancel
Custom Object Information
Label
Plural Label
Example: Account
Object Name
Description
Context-Sensitive Help Setting
Open the standard Salesforce.com Help & Training window
Open a window using a Visualforce page
Content Name
Enter Record Name Label and Format
Record Name
Example: Account Name
Data Type
Text
Optional Features
Allow Activities
Track Field History


Optional Features
Allow Reports
Allow Activities
Track Field History
Allow in Chatter Groups
Enable Licensing
Object Classification
When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. Learn more.
Allow Sharing
Allow Bulk API Access
Allow Streaming API Access
Deployment Status
What is this?
In Development
Deployed
Search Status
When this setting is enabled, your users can find records of this object type when they search. Learn more.
Allow Search
Object Creation Options (Available only when custom object is first created)
Add Notes and Attachments related list to default page layout
Launch New Custom Tab Wizard after saving this custom object
Save
Save & New
Cancel

3.Fields And Relationship

Fields in Our Customers objects follow below data types:

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

Fields in Consultants objects follow below data types:

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

Fields in Others objects follow below data types:

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

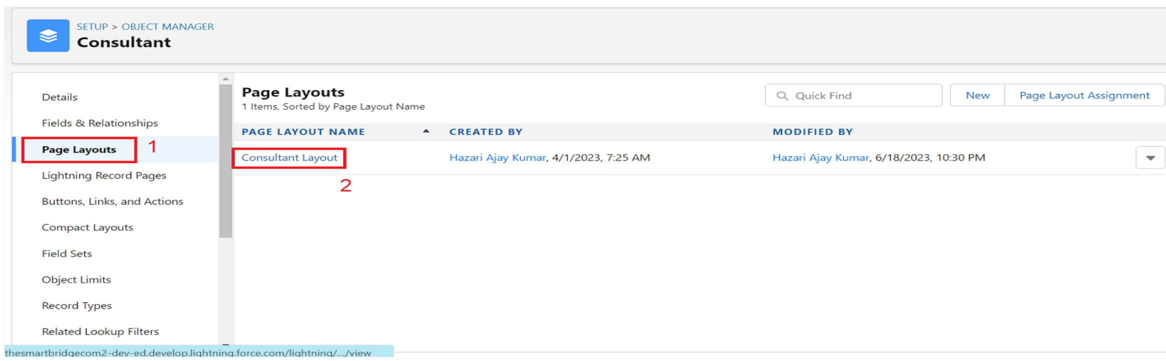
Fields in Retailers objects follow below data types:

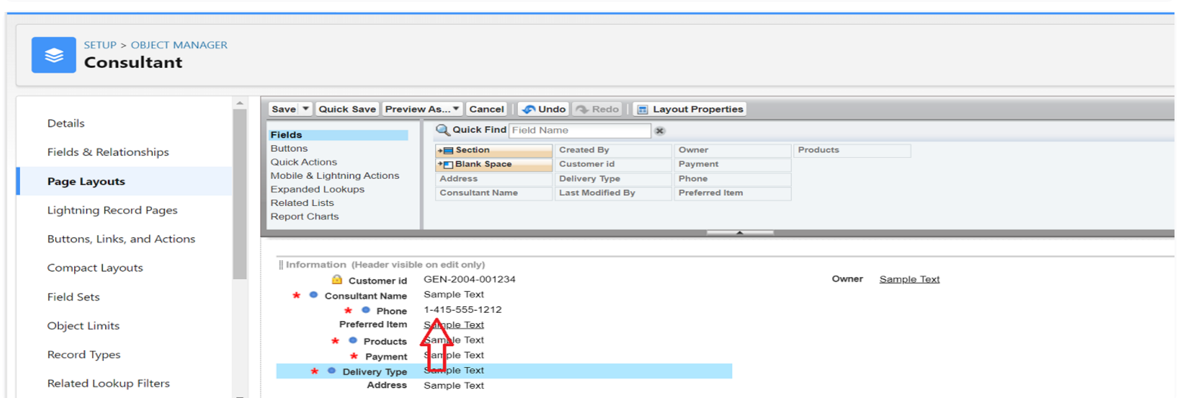
S No	Field Label	Data Type
1	Customer id	Auto Number
2	Customer Name	Text
3	Mobile Number	Phone
4	Email id	Email
5	Delivery Type 1)Self Pickup 2)Courier	Picklist
6	Products 1)Lipstick 2)Compact 3)EyeLiner 4)FacePack 5)Lip Balm	Multi-Picklist
	6)Nail Polish	
7	Payment 1)Debit Card 2)Credit Card 3)UPI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

In the Cosmetic Store Management System built on Salesforce, 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.

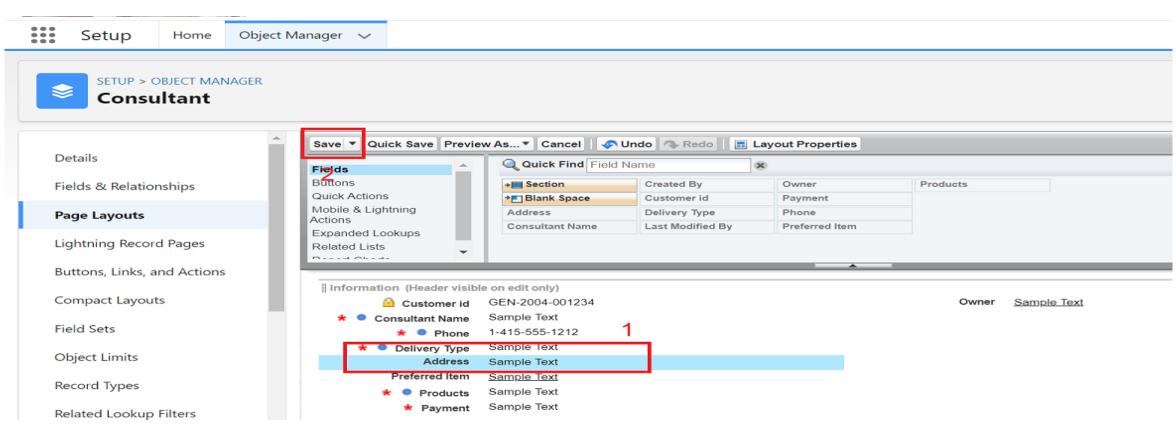
4.Page Layout

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 Delivery type and Address Fields Below Phone field.





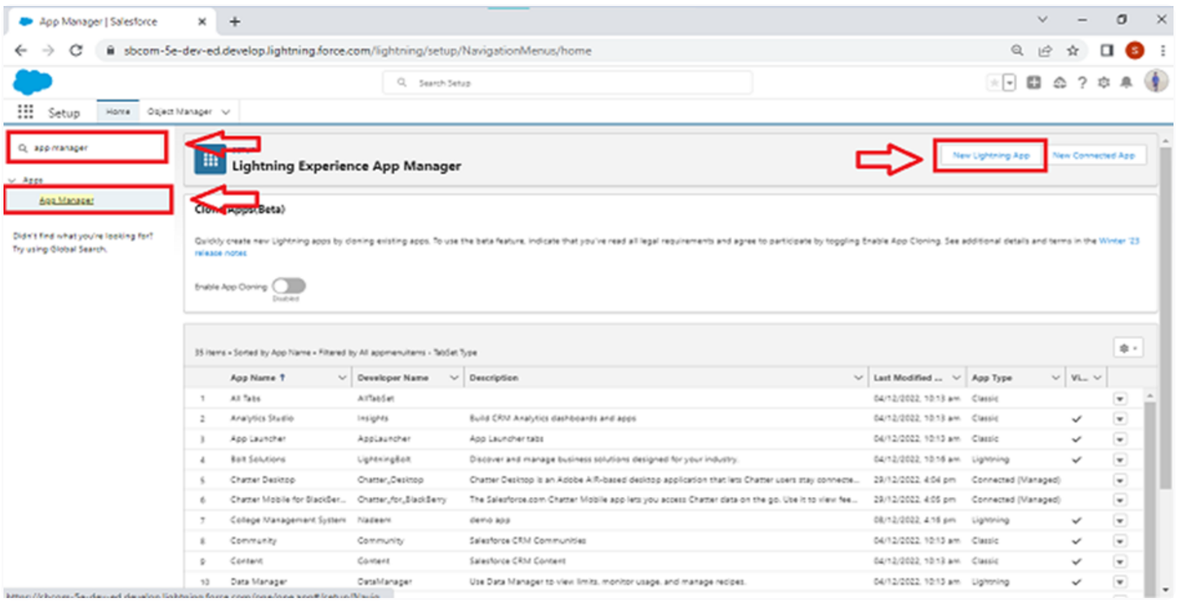
5.Click on Save



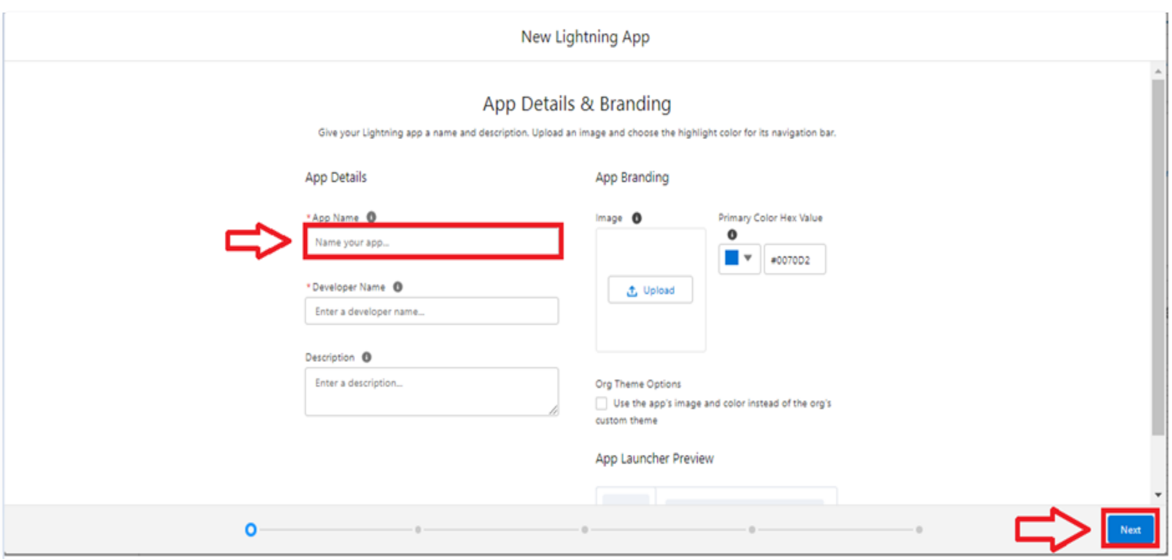
5.Lightning App

To create a lightning app page:

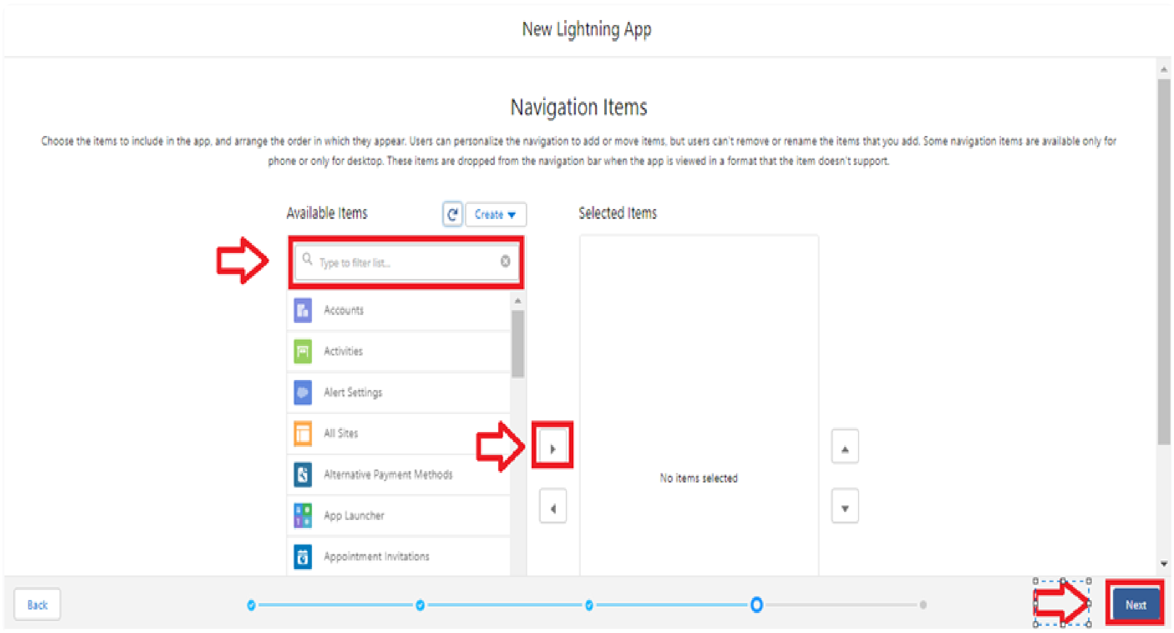
1. Go to setup page --> search “app manager” in quick find --> select “app manager” --> click on New lightning App.



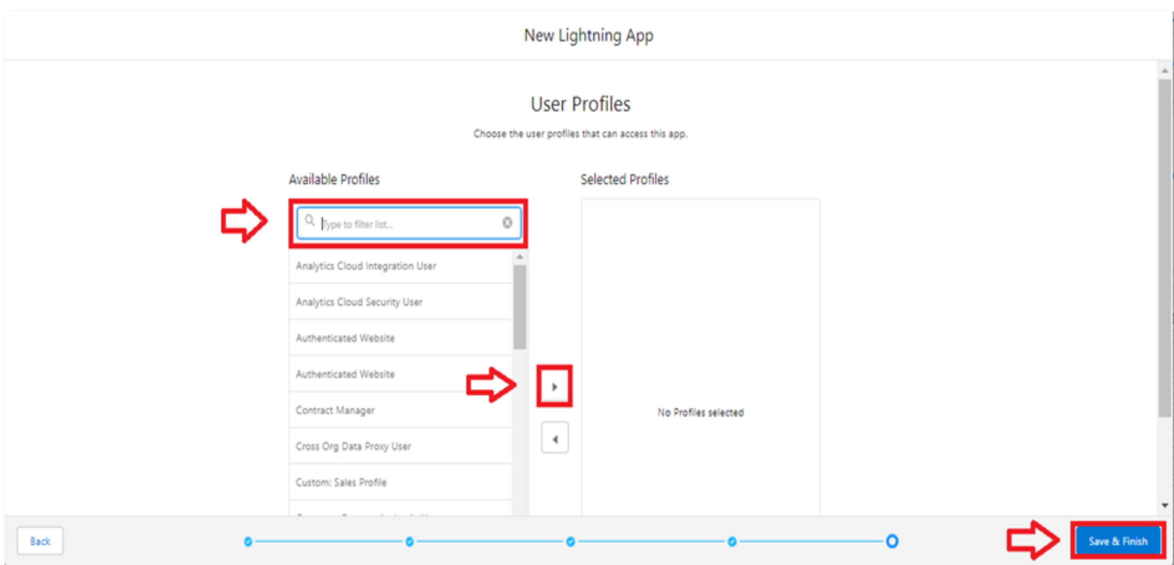
2. Fill the app name as Urban Color in app details and branding --> Next --> (App option page) keep it as default --> Next --> (Utility Items) keep it as default --> Next.



3. To Add Navigation Items:



4. Select items Our Customers,Consultants,Retailers,Others,Reports,Dashboards from the search bar and move it using the arrow button --> Next.
5. To Add User Profiles:



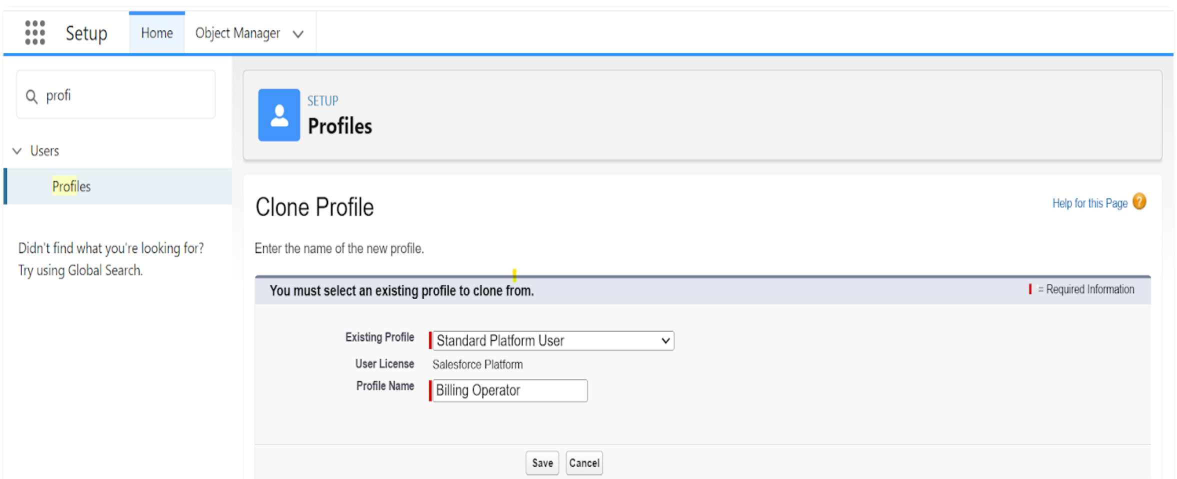
6. Search profiles (System administrator) in the search bar --> click on the arrow button --> save & finish.

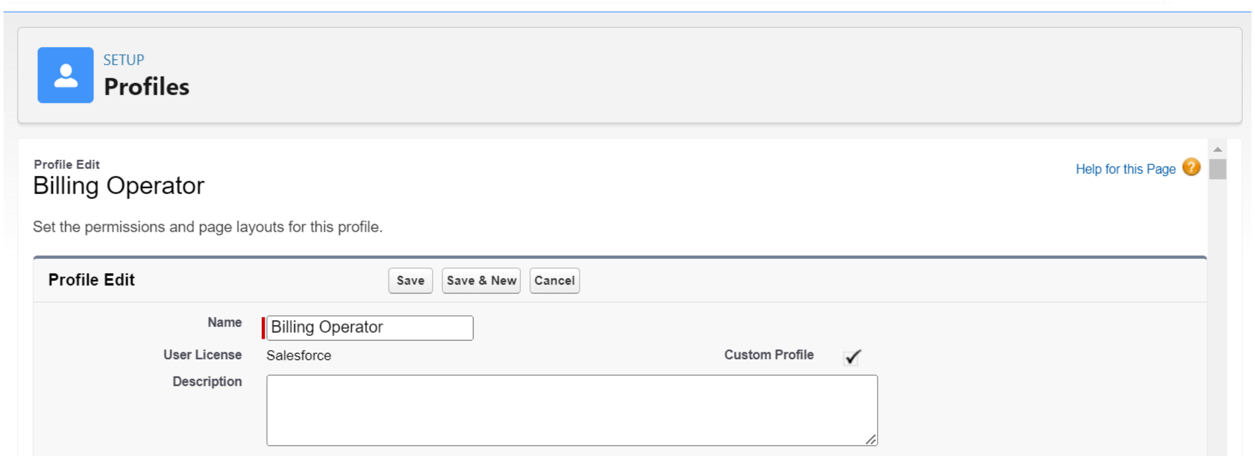
6.Creating Profiles

Creating a 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.

- From Setup enter Profiles in the Quick Find box, and select Profiles.
- From the list of profiles, find Standard User.
- Click Clone.
- For Profile Name, enter Store Supervisor.
- Click Save.
- While still on the Store Supervisor profile page, then click Edit.
- Scroll down to Custom Object Permissions and give access for Create,Read,Edit,Delete,View all and modify all for Our Customers,Consultants,Retailers,Others.
- Scroll down to Custom App Settings and give access for Urban Color.

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



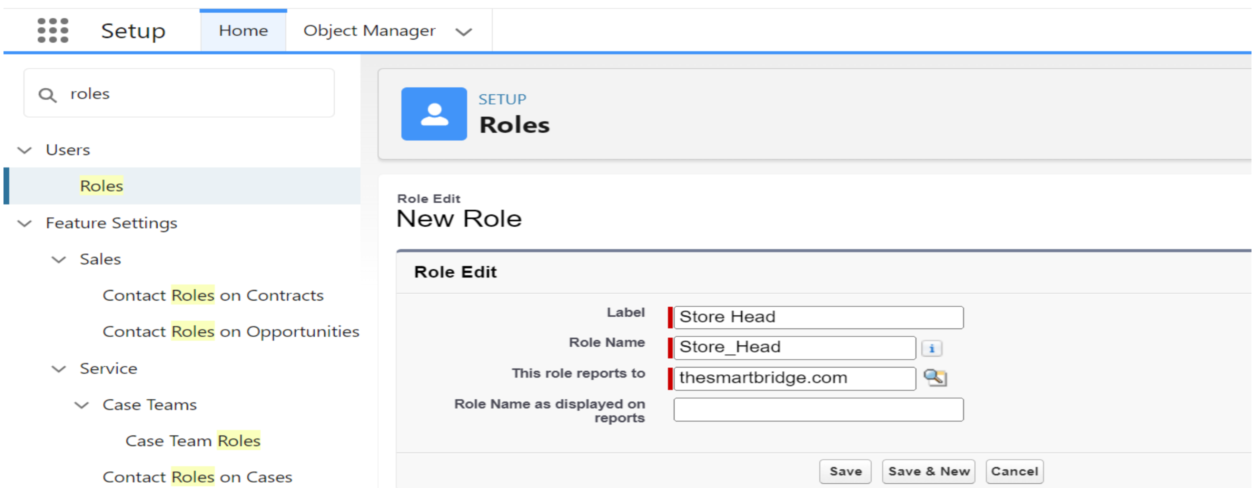


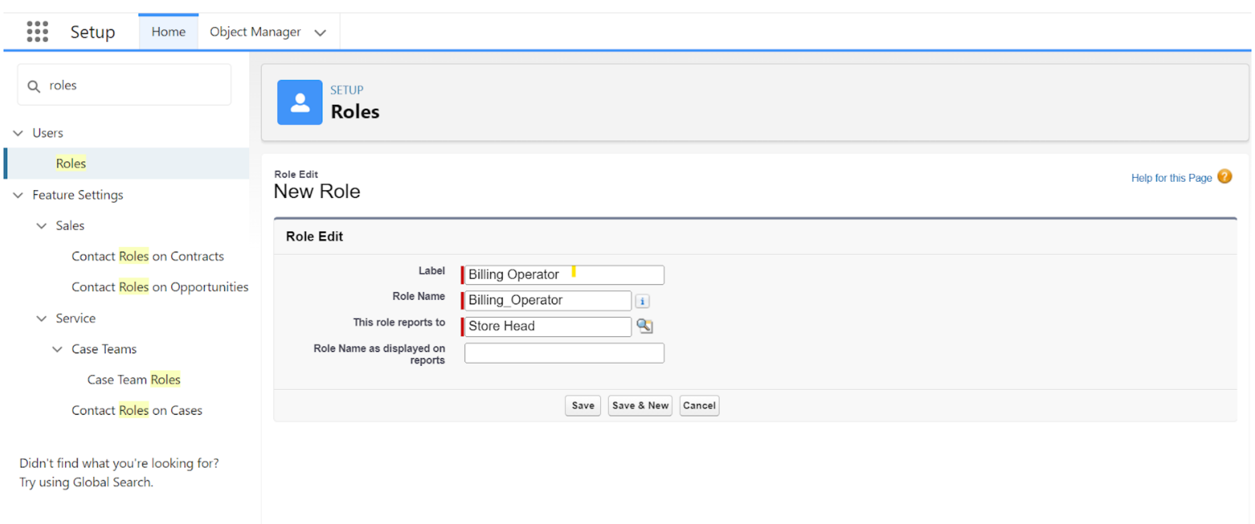
Click On Save.

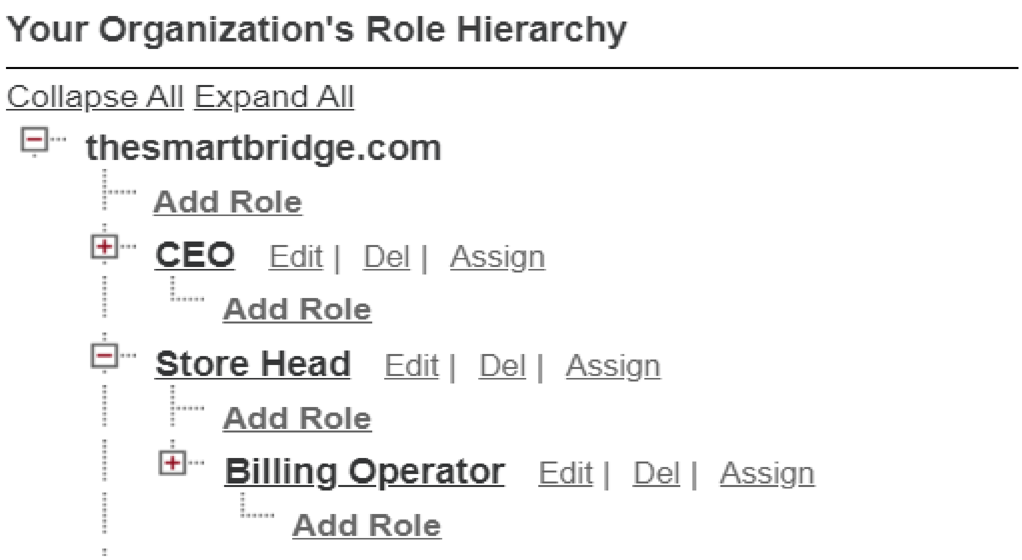
7.Setup Roles

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 up the Label as Store Head, Role Name Store_Head.
9. Enter a Role name that will be displayed on Reports,Click on Save .

Similarly create One Roles under Store Head as Billing Operator.



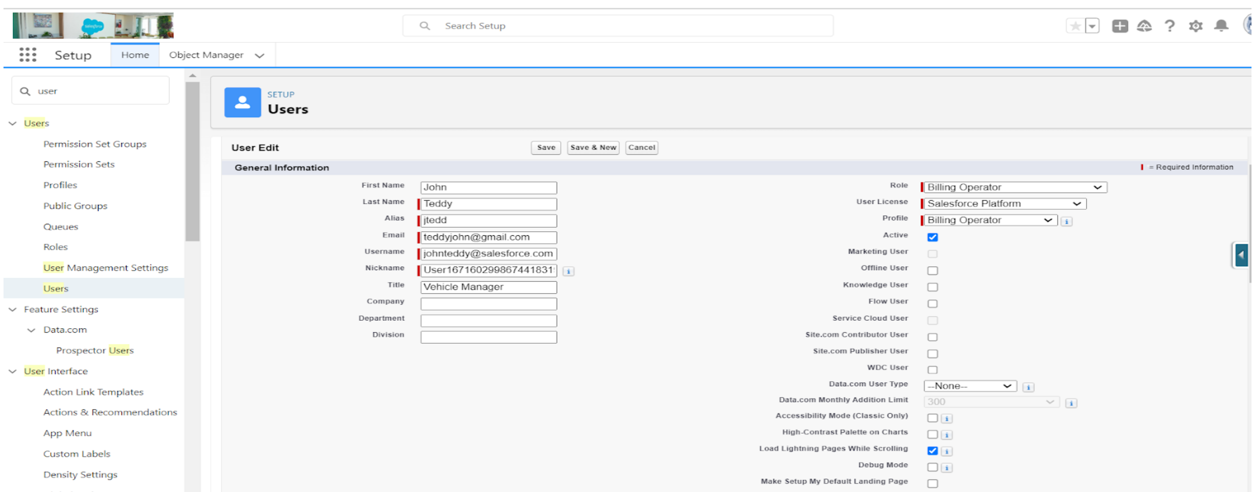




In Salesforce, roles define the hierarchy and access levels for users within an organization. Roles determine the visibility of records and data sharing based on an employee's position and responsibilities. By establishing a role hierarchy, Salesforce allows users to access and manage records owned by 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.

8.Creation of Users

1. From Setup, in the Quick Find box, enter Users, and then select Users.
2. Click New User.
3. Enter the user's name Amar K and (Your) email address and a unique username in the form of an email address. By default, the username is the same as the email address.
4. Select a Role(Store Head)
5. Select a User Licence As Salesforce.
6. Select a profile as Store Supervisor.
7. Check Generate new password and notify the user immediately to have the user's login name and a temporary password emailed to your email.



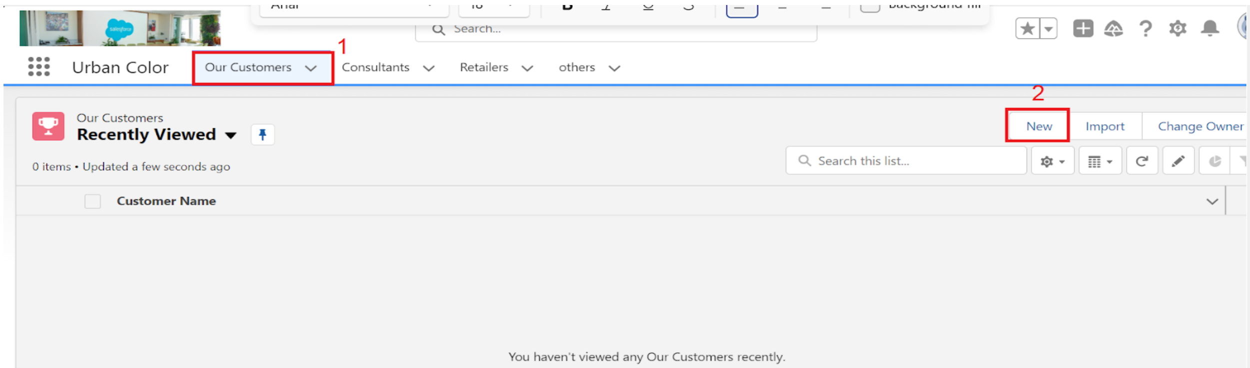
Second User Creation

1. From Setup, in the Quick Find box, enter Users, and then select Users.
2. Click New User.
3. Enter the user's name John Teddy and (Your) email address and a unique username in the form of an email address. By default, the username is the same as the email address.
4. Select a Role(Billing Operator)
5. Select a User Licence As Salesforce Platform.
6. Select a profile as Billing Operator.
7. Check Generate new password and notify the user immediately to have the user's login name and a temporary password emailed to your email.

9.User Adoption

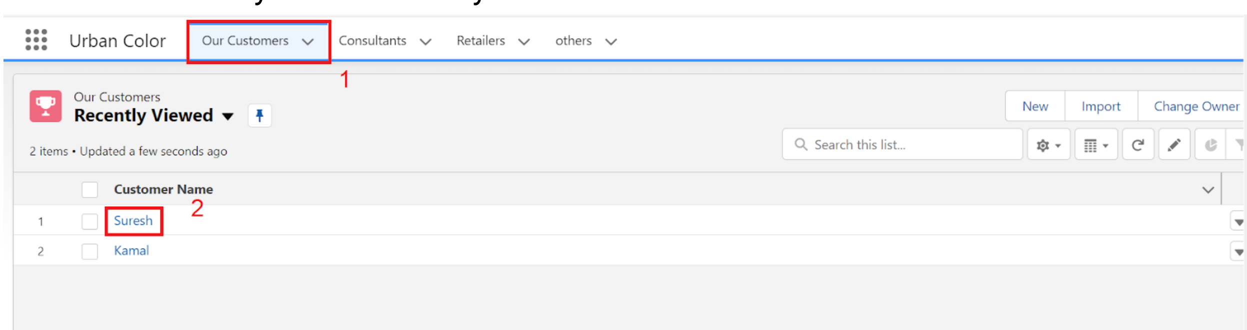
Create Our Customer Record

1. Click on App Launcher on left side of screen.
2. Search Urban Color & click on it.
3. Click on Our Customer tab.
4. Click new button
5. Fill all Our Customer record details.
6. Click on Save Button



View Record (Our Customer):

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

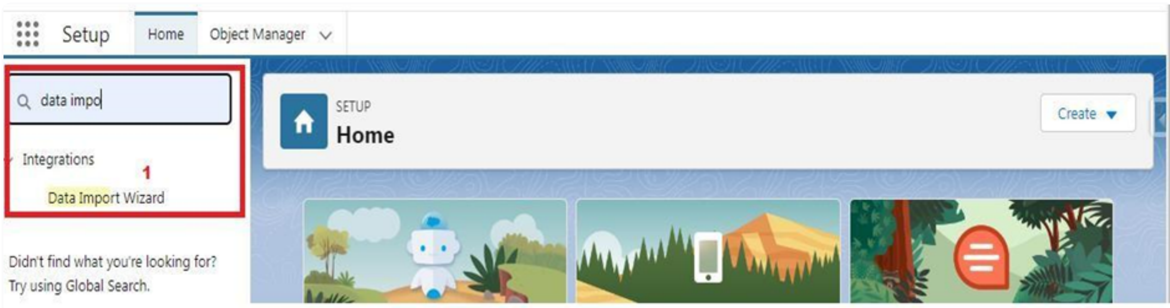


Delete Record (Our Customer):

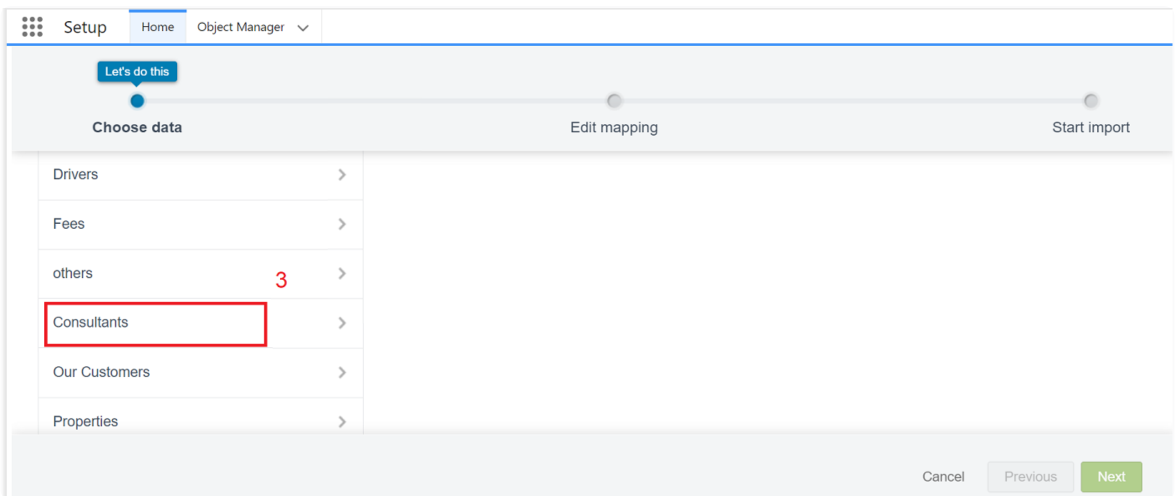
1. Click on App Launcher on the left side of the screen.
2. Search Urban Color & click on it.
3. Click on Our Customer Tab.
4. Click on Arrow at right hand side on that Particular record.
5. Click delete and delete again.

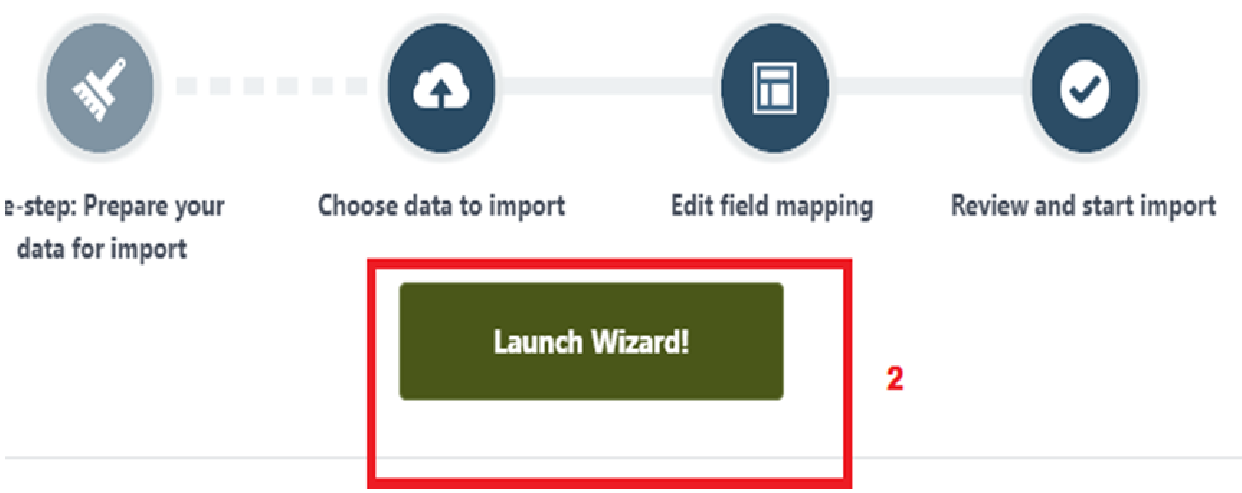
10.Importing Data

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



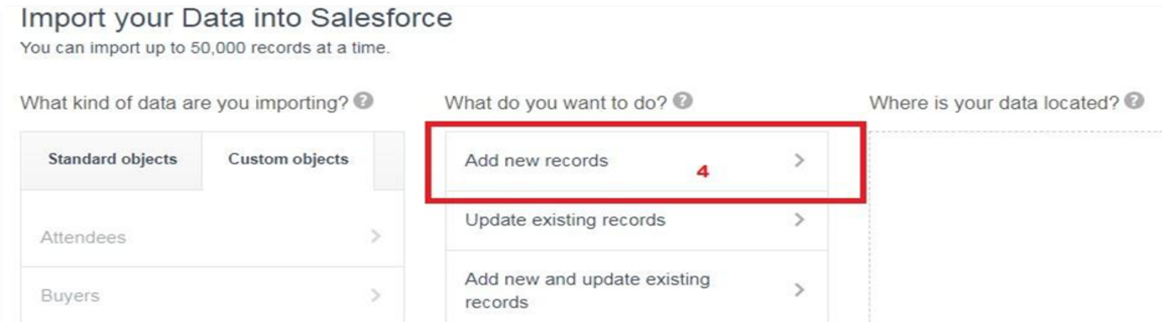
3. Click Launch Wizard!



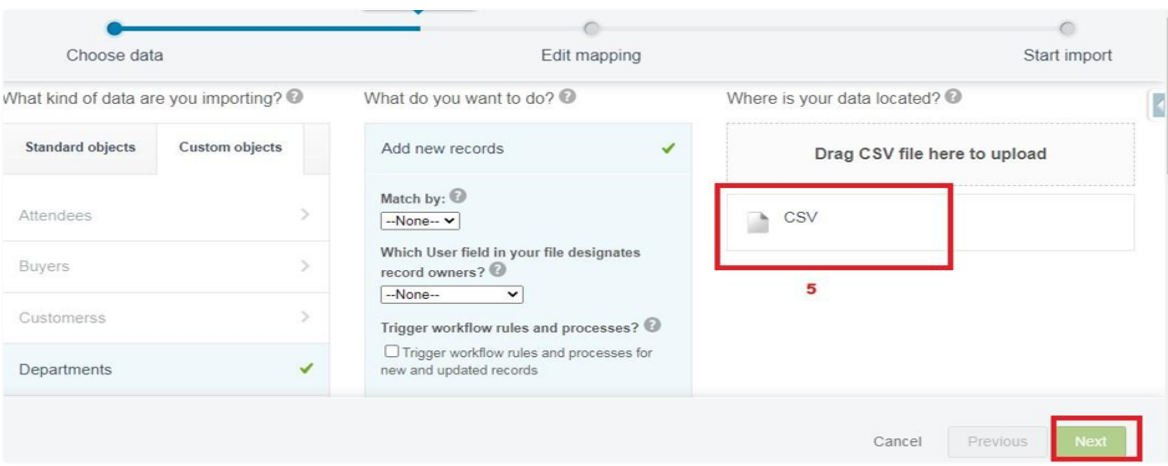


4. Click the Custom Objects tab and select the Consultant object.

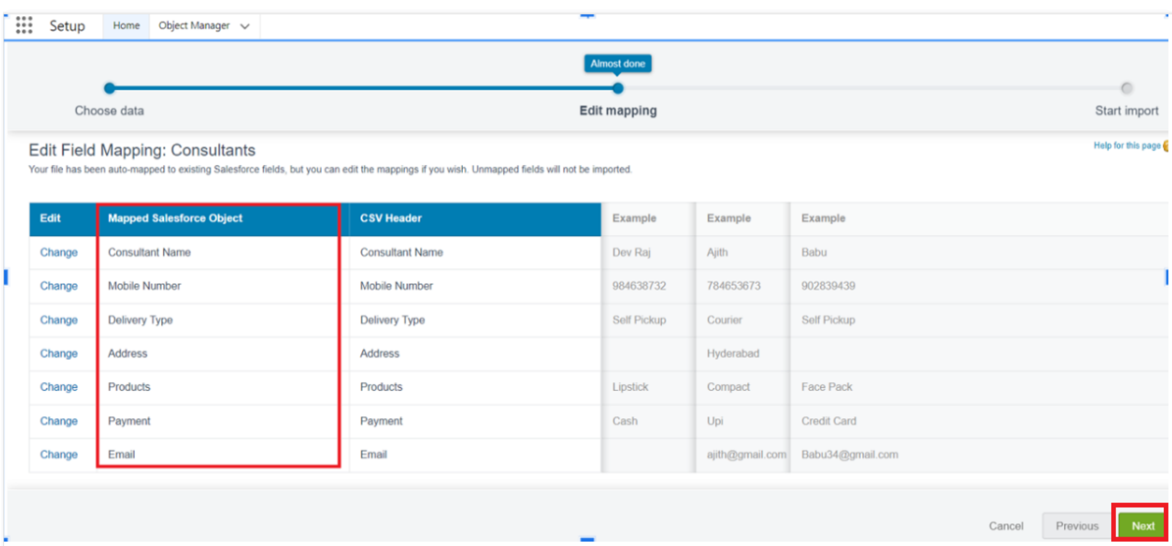
5. Select Add new records.



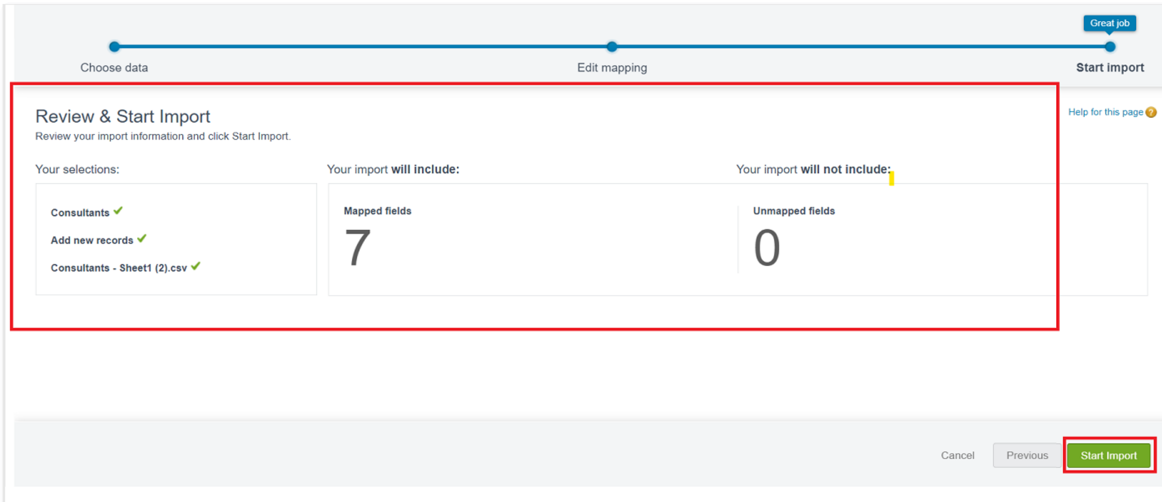
6. Click CSV and choose file Consultant_CSV which we made earlier. Click Next.



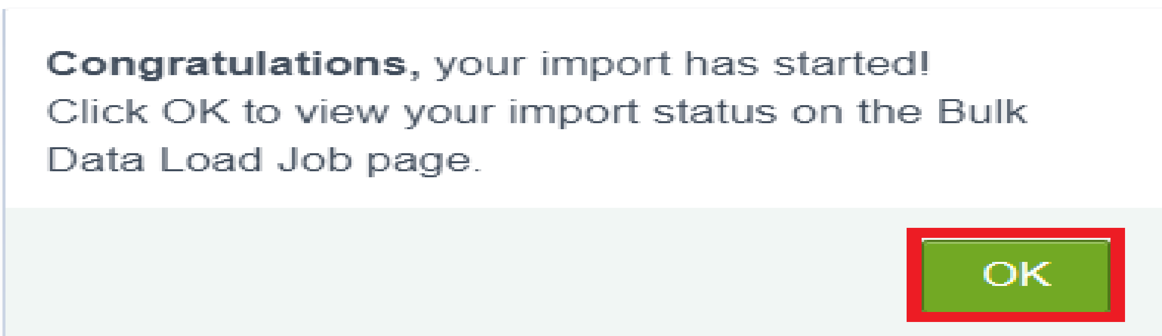
7. Since the field names in the CSV file (CSV Header) are the same as the field names in your object (Mapped Salesforce Object), the fields are automatically mapped. Click Next.



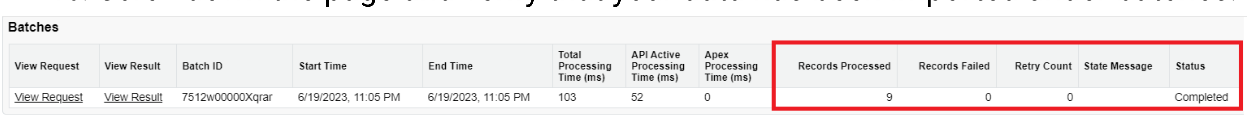
8. The next screen gives you a summary of your data import. Click Start Import.



9. Click OK on the popup.



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


Batches

View Request	View Result	Batch ID	Start Time	End Time	Total Processing Time (ms)	API Active Processing Time (ms)	Apex Processing Time (ms)	Records Processed	Records Failed	Retry Count	State Message	Status
View Request	View Result	7512w00000Xqrar	6/19/2023, 11:05 PM	6/19/2023, 11:05 PM	103	52	0	9	0	0		Completed

11. Make sure you have 0 records under the records failed column. **Note** - Do Field mapping carefully.

11.Accessing Reports

Create Report:

1.Click App Launcher

2.Select Urban Color App

3.Click reports tab

4.Click New Report.

5.Click the report type as Consultants Click Start report.

6.Customize your report, in Columns select - ConsultantName,Delivery type,Products,Payment.

7.Click on the drop down option on the payment column and select Bucket this column.

8.Bucket Name as Payment type

9.Click on Add Bucket and name it as NetBanking

10.Click on Add Bucket and name it as Cash

11.Now Click on All Values and select Credit card,Debit card,Upi and Move to Net Banking.

12.Now Click on All Values again and select Cash and Move to Cash.

13.Click on Apply.

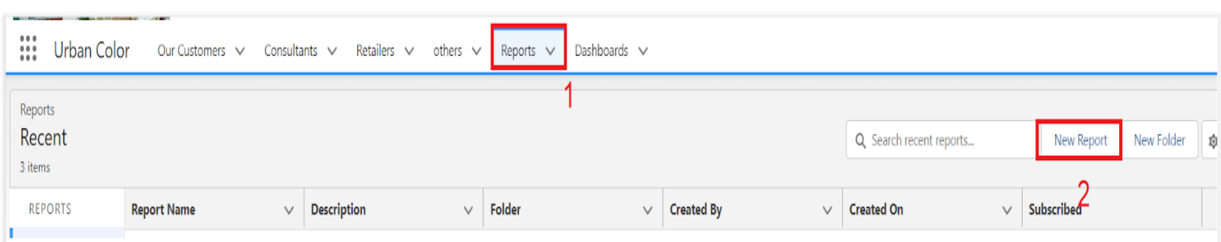
14.In Group Rows Add Payment Type Bucket Field.

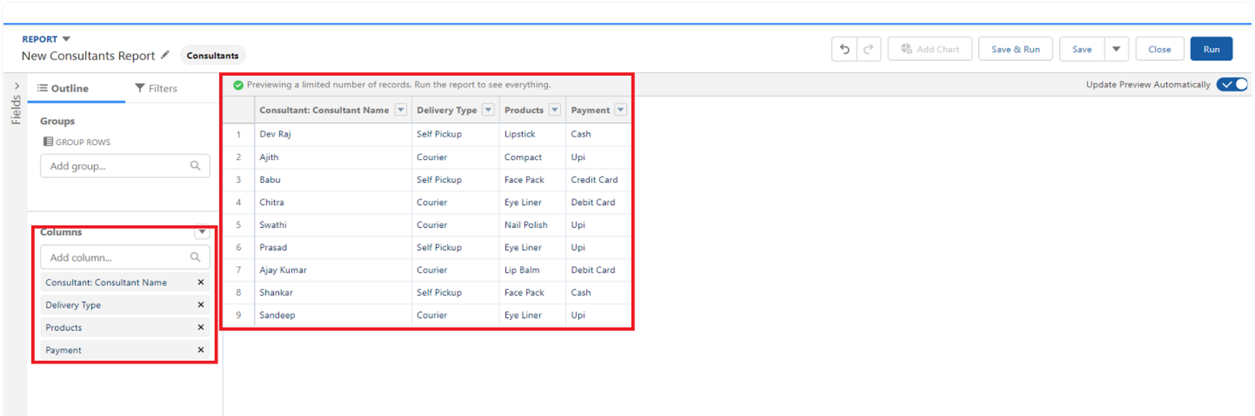
15.Click refresh

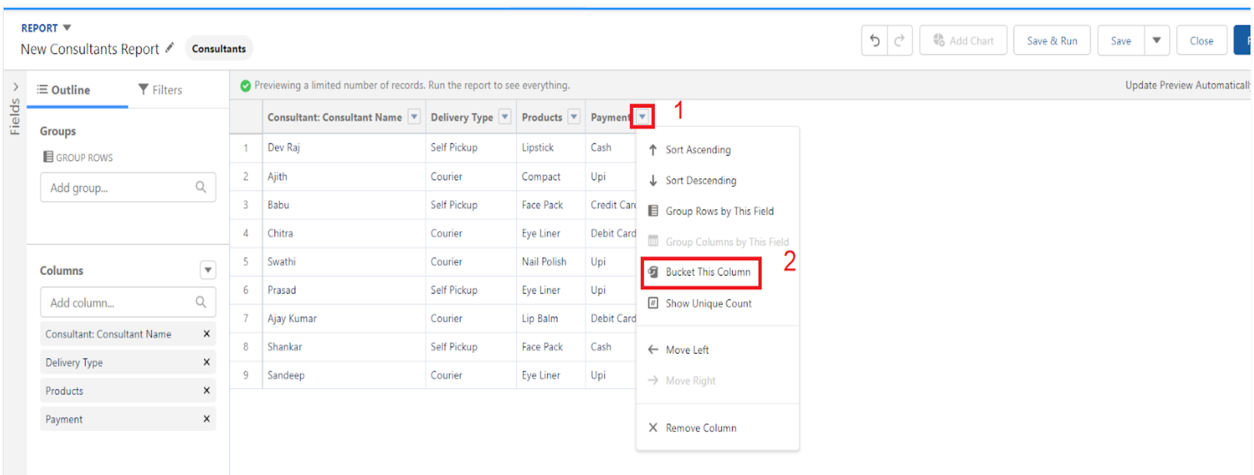
16.Click Save and Run

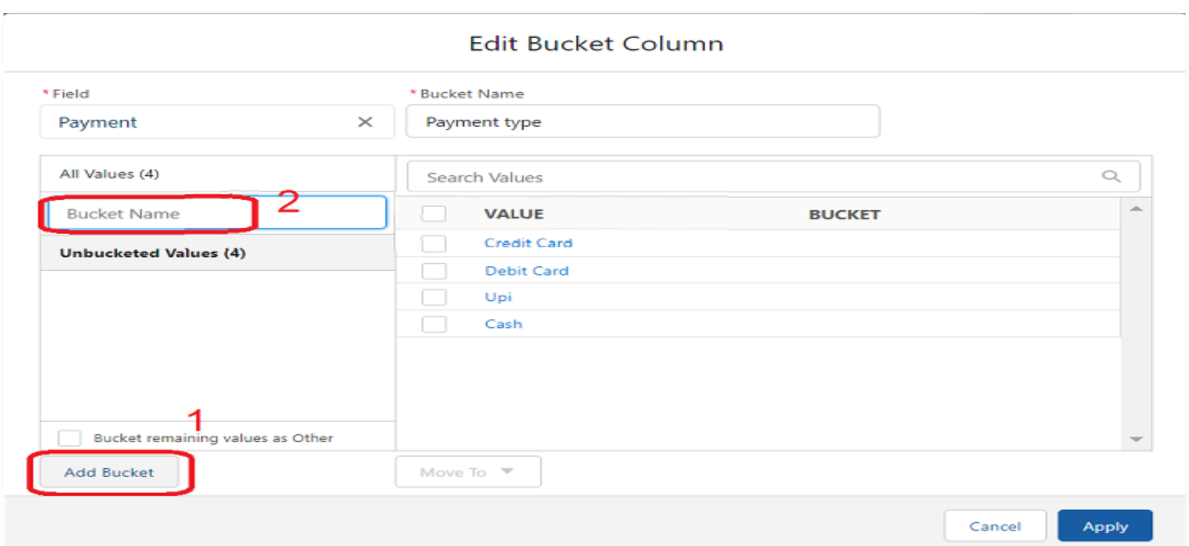
17.Give report name – Consultant report

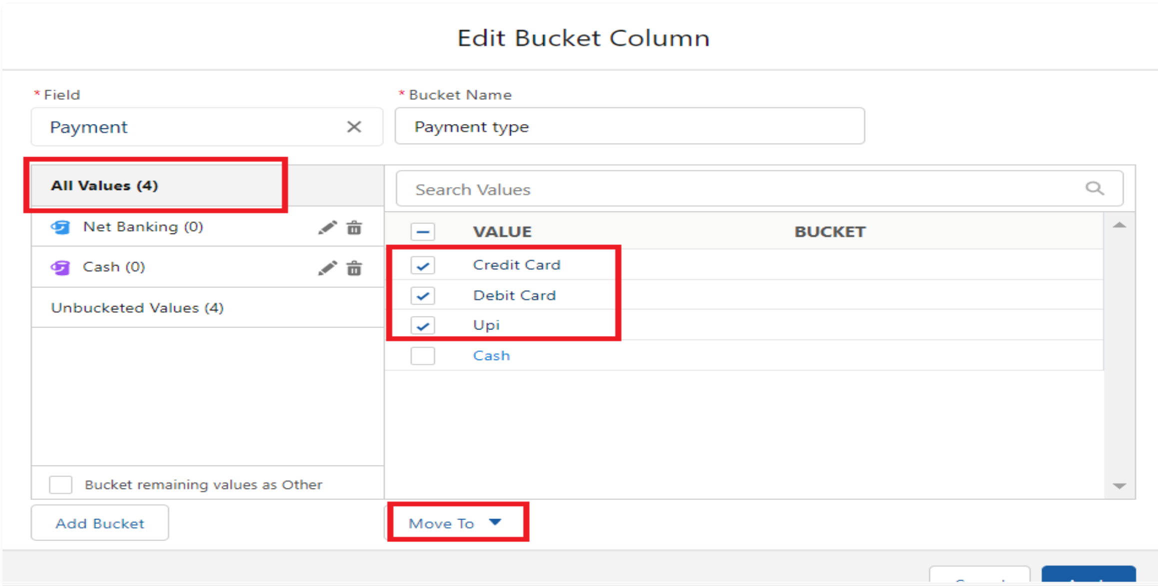
18.Click Save

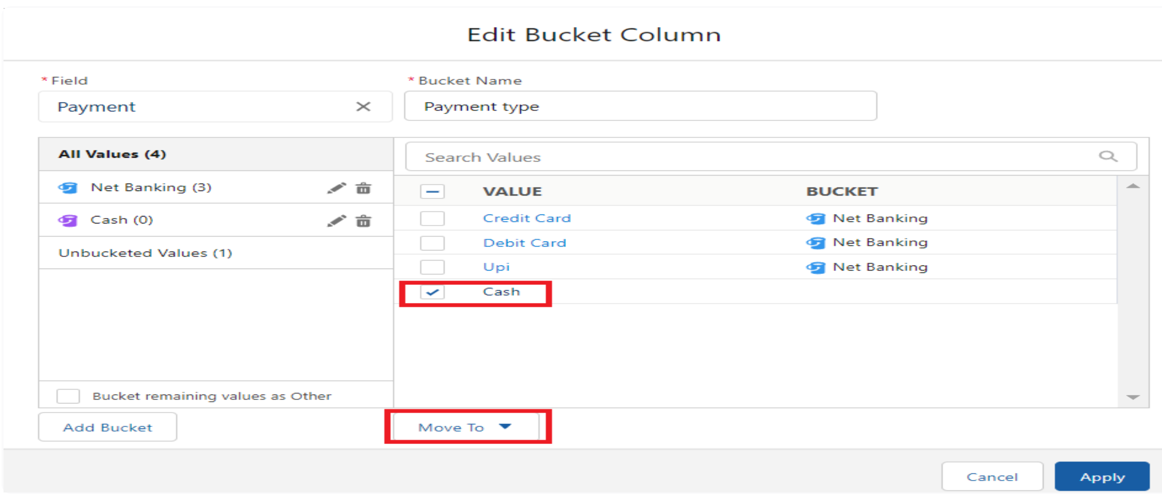


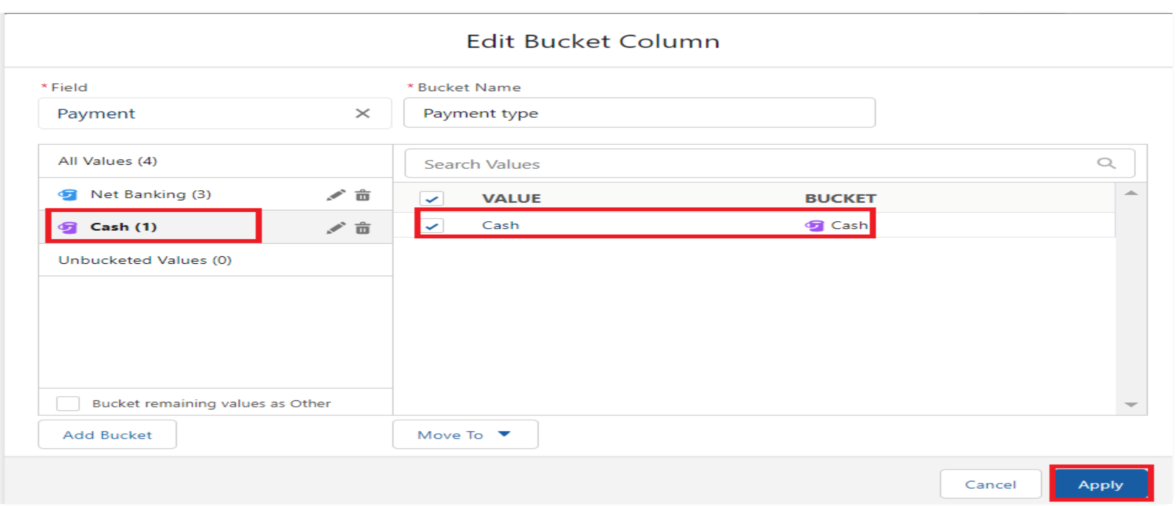

REPORT
New Consultants Report
Consultants
Add Chart
Save & Run
Save
Close
Run
Outline
Filters
Groups
GROUP ROWS
Add group...
Columns
Add column...
Consultant: Consultant Name
Delivery Type
Products
Payment
Previewing a limited number of records. Run the report to see everything.
Update Preview Automatically
Consultant: Consultant Name
Delivery Type
Products
Payment
1 Dev Raj Self Pickup Lipstick Cash
2 Ajith Courier Compact Upi
3 Babu Self Pickup Face Pack Credit Card
4 Chitra Courier Eye Liner Debit Card
5 Swathi Courier Nail Polish Upi
6 Prasad Self Pickup Eye Liner Upi
7 Ajay Kumar Courier Lip Balm Debit Card
8 Shankar Self Pickup Face Pack Cash
9 Sandeep Courier Eye Liner Upi

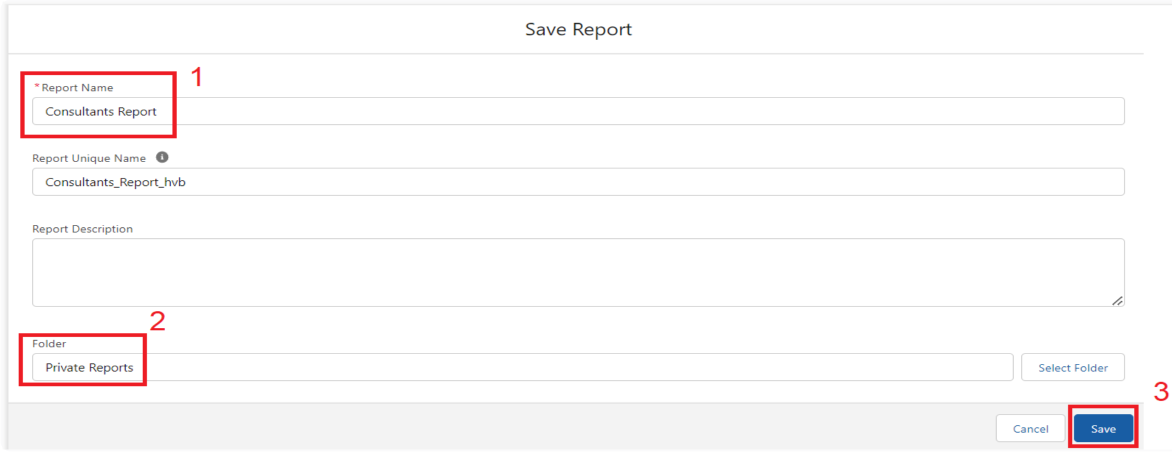

REPORT
New Consultants Report
Consultants
Add Chart
Save & Run
Save
Close
Outline
Filters
Groups
GROUP ROWS
Add group...
Columns
Add column...
Consultant: Consultant Name
Delivery Type
Products
Payment
Previewing a limited number of records. Run the report to see everything.
Update Preview Automaticall
1
Sort Ascending
Sort Descending
Group Rows by This Field
Group Columns by This Field
Bucket This Column
2
Show Unique Count
Move Left
Move Right
Remove Column


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


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

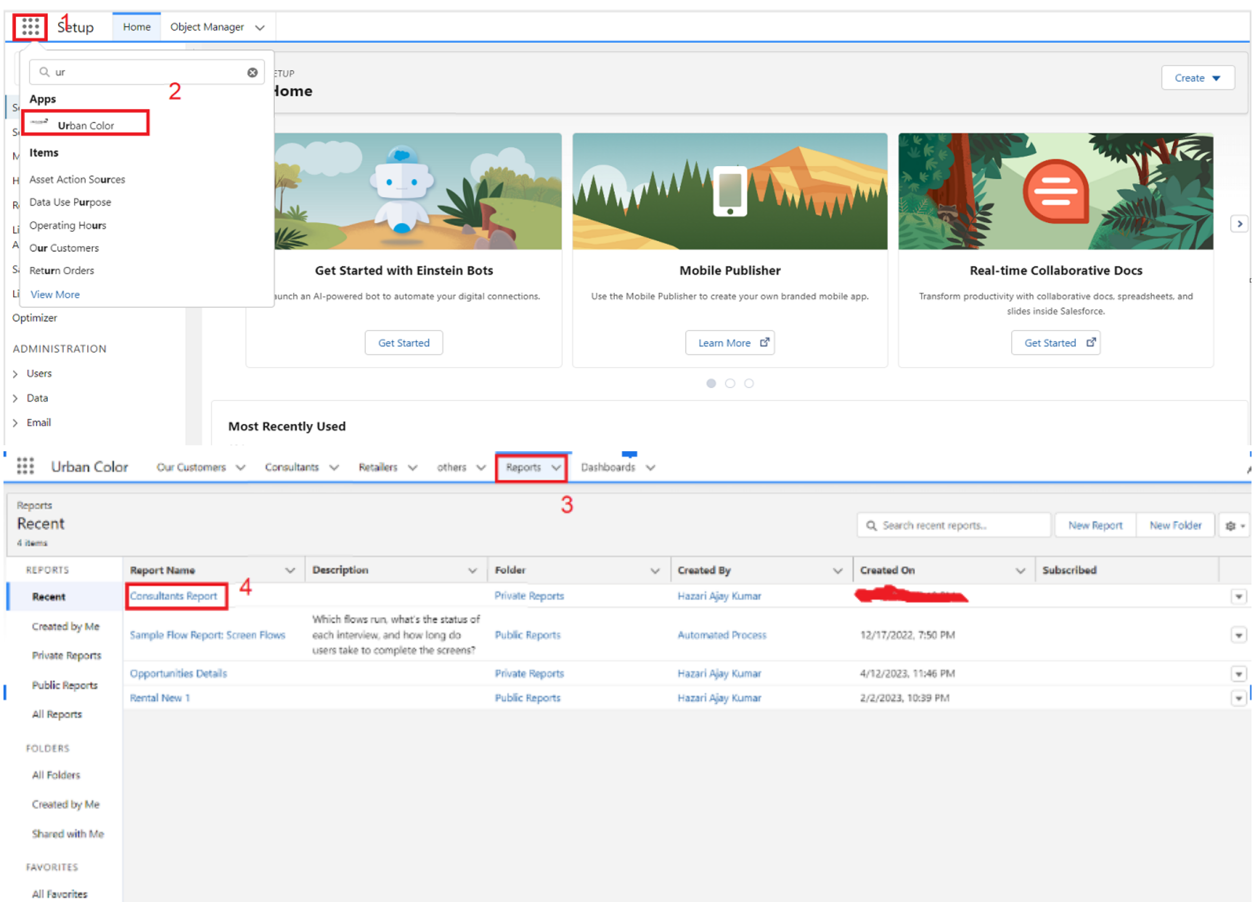

Edit Bucket Column
* Field
Payment
* Bucket Name
Payment type
All Values (4)
Net Banking (3)
Cash (0)
Unbucketed Values (1)
Search Values
VALUE
BUCKET
Credit Card
Net Banking
Debit Card
Net Banking
Upi
Net Banking
Cash
Bucket remaining values as Other
Add Bucket
Move To
Cancel
Apply


Edit Bucket Column
* Field
Payment
* Bucket Name
Payment type
All Values (4)
Net Banking (3)
Cash (1)
Unbucketed Values (0)
Search Values
VALUE
BUCKET
Cash
Cash
Bucket remaining values as Other
Add Bucket
Move To
Cancel
Apply



View Report

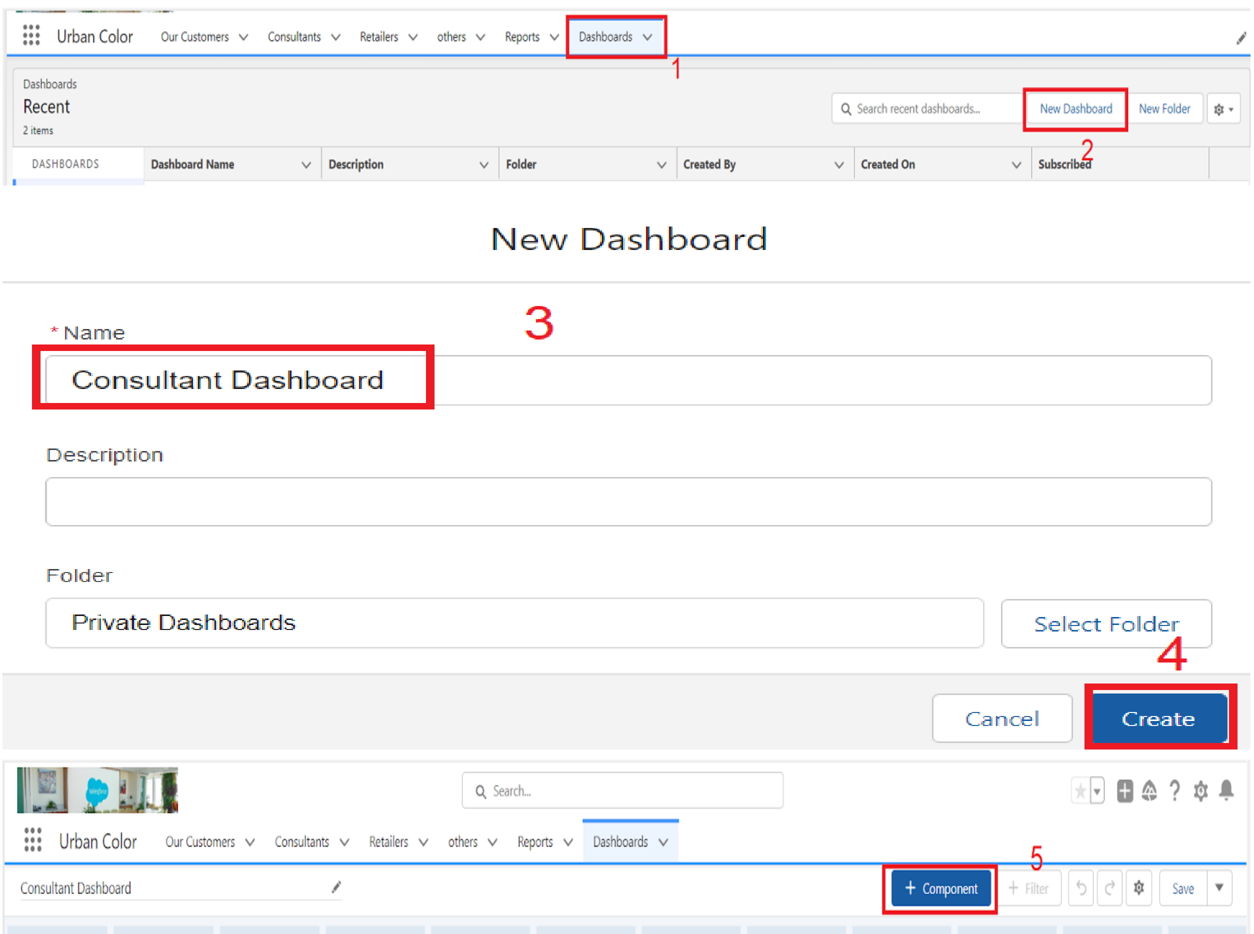
1. Click on App Launcher on the left side of the screen.
2. Search Urban Color App & click on it.
3. Click on Reports Tab.
4. Click on Urban Color Report and see records

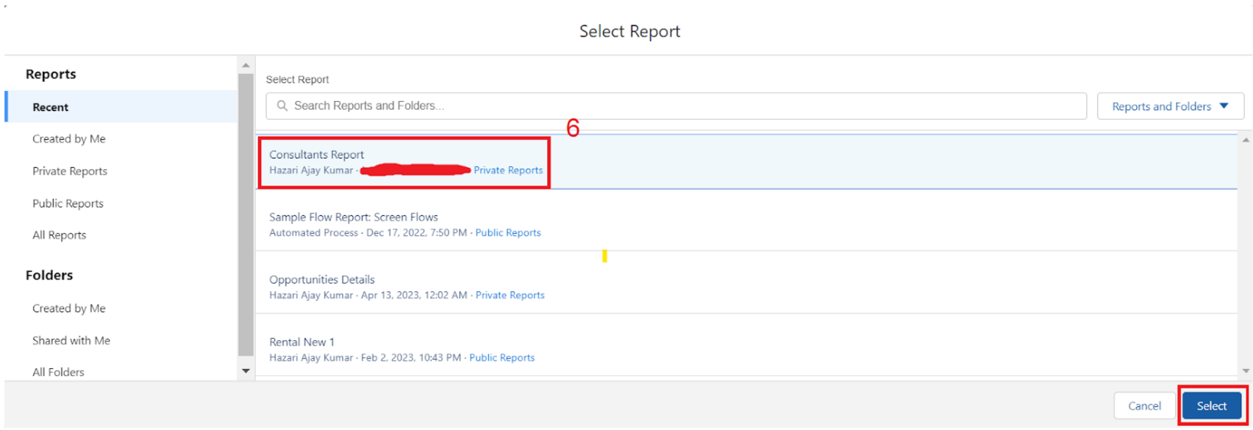


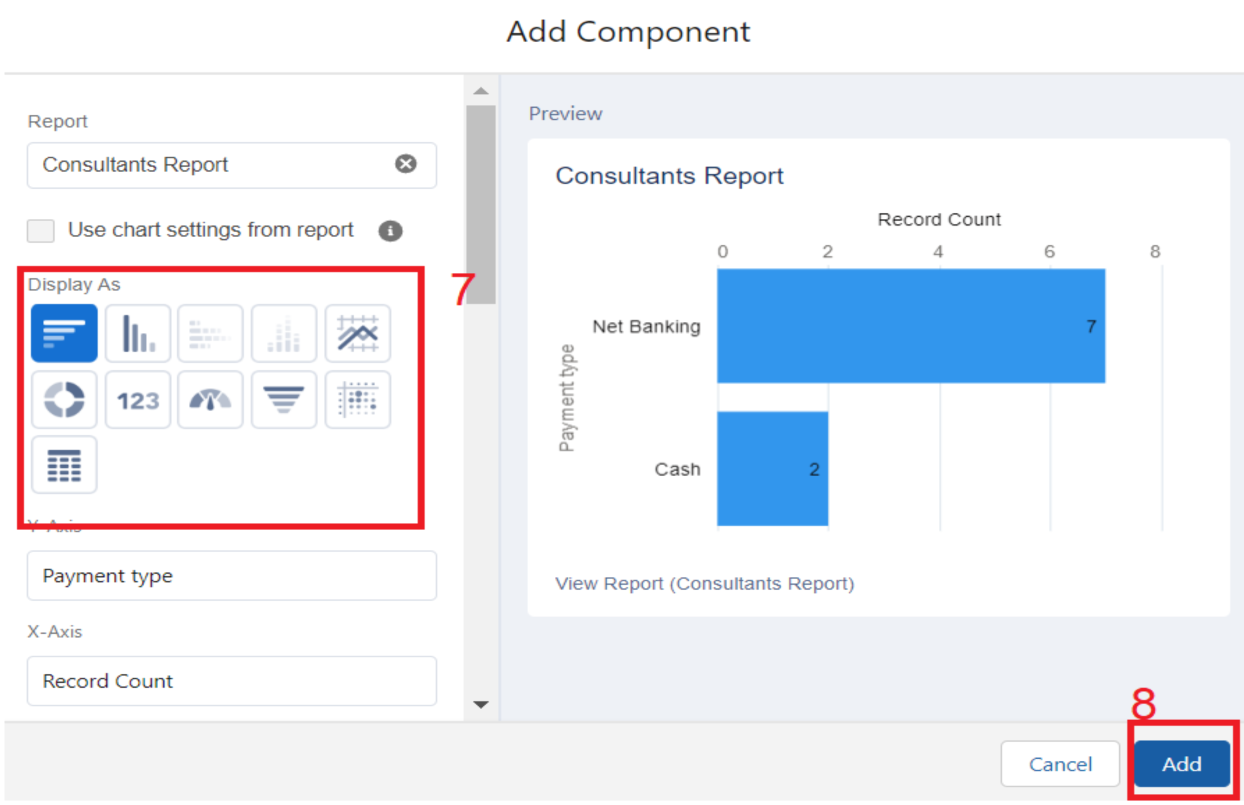
12.Working With Dashboards

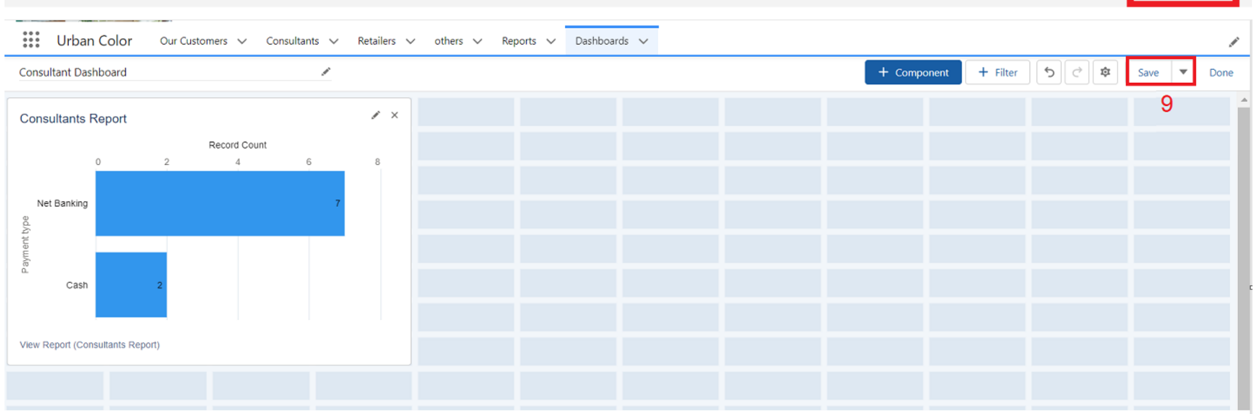
Create Dashboard:

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




Select Report
Reports
Recent
Created by Me
Private Reports
Public Reports
All Reports
Folders
Created by Me
Shared with Me
All Folders
Select Report
Search Reports and Folders...
Reports and Folders
6
Consultants Report
Hazari Ajay Kumar · Private Reports
Sample Flow Report: Screen Flows
Automated Process · Dec 17, 2022, 7:50 PM · Public Reports
Opportunities Details
Hazari Ajay Kumar · Apr 13, 2023, 12:02 AM · Private Reports
Rental New 1
Hazari Ajay Kumar · Feb 2, 2023, 10:43 PM · Public Reports
Cancel
Select


Add Component
Report
Consultants Report
Use chart settings from report
Display As
7
123
Y-Axis
Payment type
X-Axis
Record Count
Preview
Consultants Report
Record Count
0
2
4
6
8
Payment type
Net Banking
7
Cash
2
View Report (Consultants Report)
8
Cancel
Add


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

View Dashboard:

1. Click on App Launcher on the left side of the screen.
2. Search Candidate Internal Result Card & click on it.
3. Click on Dashboard Tab.
4. Click on Candidate Internal Result Card see graph view of records