

# COSMETIC STORE MANAGEMENT

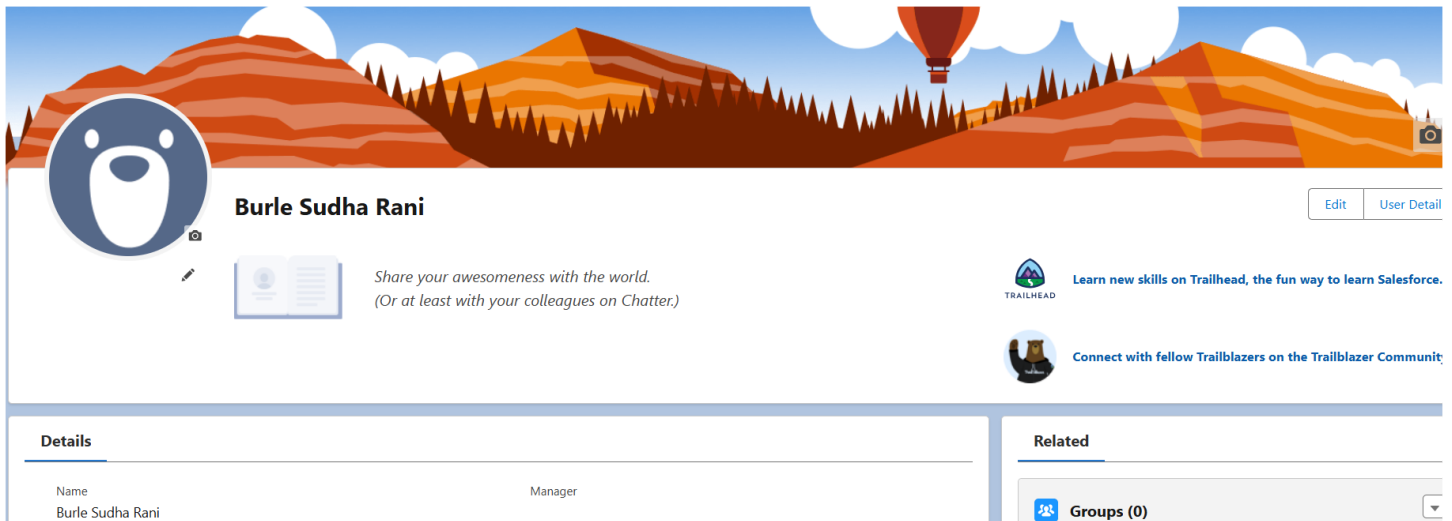
Cosmetic Store Management in Salesforce is a solution that helps cosmetics stores manage their operations efficiently and manage their operations efficiently and effectively . The Solution is built on the Salesforce platform for managing customer relationships, sales, and inventory cosmetics stores improve their operational efficiency enhance customer engagement and drive growth.

Step 1: Sign up free salesforce developer org

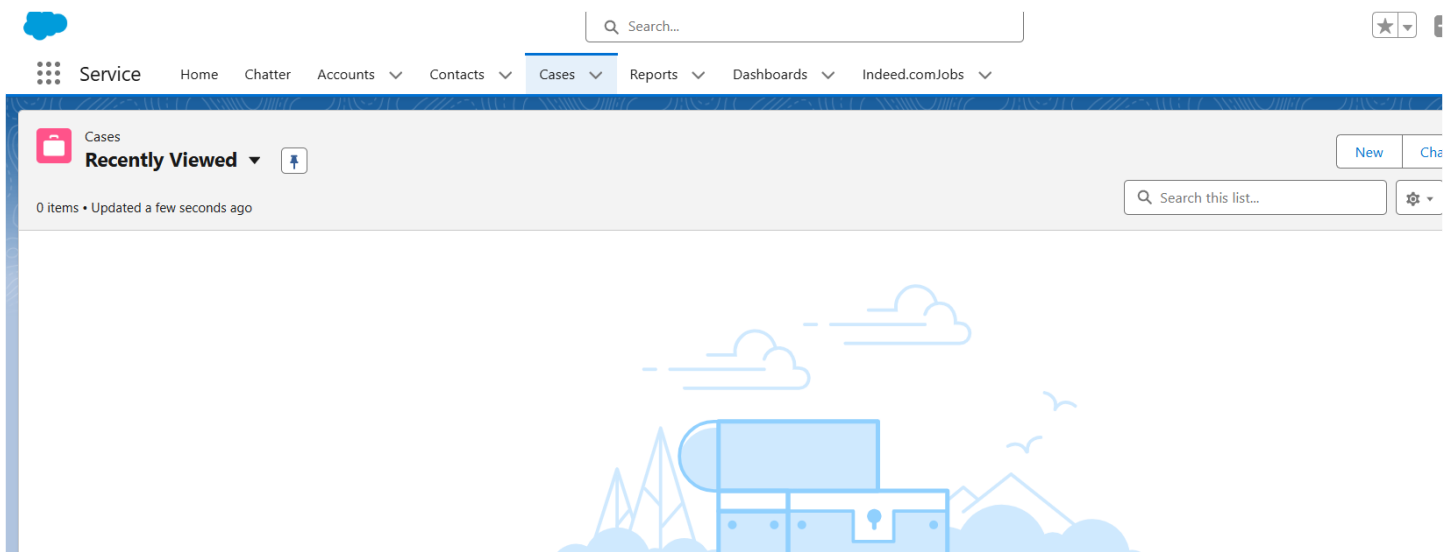
Register :

Name, Company Name, User ID, Email

After few mins check email and verify the account login with user id and password



Step 2: Open Salesforce org



OBJECTS: - Salesforce objects are database tables that permit you to to store data that is specific

# COSMETIC STORE MANAGEMENT

to an organisation.

Create custom objects to model the cosmetics store management

Go to setup > object manager > create > custom object

## 1. Our Customer Object

SETUP > OBJECT MANAGER

Our Customer

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

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

EditDelete

## 2. Consultants Object

SETUP > OBJECT MANAGER

Consultant

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Sharing Rules

Details

Description

API Name

Consultant\_\_c

Custom

✓

Singular Label

Consultant

Plural Label

Consultants

Enable Reports

✓

Track Activities

✓

Track Field History

✓

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

EditDelete

# COSMETIC STORE MANAGEMENT

## 3. Retailers object

SETUP > OBJECT MANAGER

Retailer

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Details

Description

API Name  
Retailer\_\_c

Custom  
✓

Singular Label  
Retailer

Plural Label  
Retailers

Enable Reports  
✓

Track Activities  
✓

Track Field History  
✓

Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

EditDelete

## 4. Others Object

SETUP > OBJECT MANAGER

Other

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Details

Description

API Name  
Other\_\_c

Custom  
✓

Singular Label  
Other

Plural Label  
Others

Enable Reports  
✓

Track Activities  
✓

Track Field History  
✓

Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

### Step 3:- Fields and Relationships

Add fields to each object using appropriate data types.

#### 1. Our Customer

# COSMETIC STORE MANAGEMENT

SETUP > OBJECT MANAGER

Our Customer

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Fields & Relationships

9 Items, Sorted by Field Label

Q Quick Find

NewDeleted FieldsField DependenciesSet History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Additional Information	Additional_Information__c	Text Area(255)		
Address	Address__c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
Customer id	Customer_id__c	Auto Number		
Email id	Email_id__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Mobile Number	Mobile_Number__c	Phone		
Our Customer Name	Name	Text(80)		✓
Owner	OwnerId	Lookup(User,Group)		✓

## 2. Consultants

SETUP > OBJECT MANAGER

Consultant

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Details

Description

API Name

Consultant\_\_c

Custom

✓

Singular Label

Consultant

Plural Label

Consultants

Enable Reports

✓

Track Activities

✓

Track Field History

✓

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

## 3. Retailers

# COSMETIC STORE MANAGEMENT

SETUP > OBJECT MANAGER

## Retailer

Details

**Fields & Relationships**

11 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

Customer Details	Customer_Details__c	Master-Detail(Our Customer)	✓	▼
Customer id	Customer_id__c	Auto Number		▼
Customer Name	Customer_Name__c	Text(20)		▼
Delivery Type	Delivery_Type__c	Picklist		▼
Email id	Email_id__c	Email		▼
Last Modified By	LastModifiedById	Lookup(User)		▼
Mobile Number	Mobile_Number__c	Phone		▼
Payment	Payment__c	Picklist		▼
Products	Products__c	Picklist (Multi-Select)		▼
Retailers Name	Name	Text(80)	✓	▼

## 4. Others

SETUP > OBJECT MANAGER

## Other

Details

**Fields & Relationships**

8 Items, Sorted by Field Label

Quick Find New Deleted Fields

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD
Coupon	Coupon__c	Text(10)	
Created By	CreatedById	Lookup(User)	
Employee	Employee__c	Picklist	
Last Modified By	LastModifiedById	Lookup(User)	
Name	Name__c	Text(20)	
Other Name	Name	Text(80)	
Owner	OwnerId	Lookup(User,Group)	
Products	Products__c	Picklist (Multi-Select)	

## Step 5 : The Lightning App

# COSMETIC STORE MANAGEMENT

## App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

### App Details

\* App Name ⓘ

Urban Color

\* Developer Name ⓘ

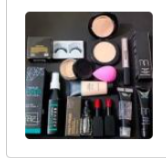
Urban\_Color

Description ⓘ

"Perfect makeup. Perfect mood. Perfect day."  
"Smile, sparkle, shine."

### App Branding

Image ⓘ



[Clear](#)

Primary Color Hex Value ⓘ

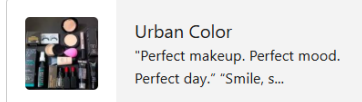


#121110

Org Theme Options

☒ Use the app's image and color instead of the org's custom theme

### App Launcher Preview



← Lightning App Builder

⚙ App Settings

📄 Pages ▾

Urban Color

?

Help

App Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items

🔄 Create ▾

🔍 Type to filter list...

📁 Accounts

📁 All Sites

📁 Alternative Payment Methods

📁 Analytics

📁 App Launcher

📁 Appointment Categories

📁 Appointment Invitations

📁 Approval Requests

📁 Approval Submission Details

📁 Approval Submissions

📁 Approval Work Items

▶

◀

Selected Items

👤 Our Customers

👤 Consultants

👤 Retailers

👤 Others

📊 Reports

📊 Dashboards

▲

▼


## Step 6:- Profile Create

A Profile is a group/ collection of settings and permissions that define what a user can do in

# COSMETIC STORE MANAGEMENT

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 and Login IP ranges.

1. Create a Store Supervisor Profile - Go to Profiles>Search Standard user in profiles>Click on Clone>Create New Clone profile> Store Supervisor

 **SETUP**  
**Profiles**

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.

[Login IP Ranges \[0\]](#) | [Enabled Apex Class Access \[0\]](#) | [Enabled Visualforce Page Access \[0\]](#) | [Enabled External Data Source Access \[0\]](#) | [Enabled Named Credential Access \[0\]](#) | [Enabled Custom Metadata Type Access \[0\]](#) | [Enabled Custom Setting Definitions Access \[0\]](#) | [Enabled Flow Access \[0\]](#) | [Enabled Service Presence Status Access \[0\]](#) |

**Profile Detail**

EditCloneDeleteView Users

Name	Store Supervisor		
User License	Salesforce Platform	Custom Profile	<input checked="" type="checkbox"/>
Description			
Created By	Burle Sudha Rani, 22/07/2025, 6:50 pm	Modified By	Burle Sudha Rani,

**Page Layouts**

<b>Standard Object Layouts</b>			
Global	<a href="#">Global Layout</a> [ View Assignment ]	Lead	<a href="#">Lead Layout</a> [ View Assignment ]
Email Application	Not Assigned [ View Assignment ]	Location	<a href="#">Location Layout</a> [ View Assignment ]
Home Page Layout	Home Page Default [ View Assignment ]	Location Group	<a href="#">Location Group La</a> [ View Assignment ]
Account	<a href="#">Account Layout</a> [ View Assignment ]	Location Group Assignment	<a href="#">Location Group As</a> [ View Assignment ]
Alternative Payment Method	<a href="#">Alternative Payment Method Layout</a> [ View Assignment ]	Object Milestone	<a href="#">Object Milestone L</a> [ View Assignment ]
Appointment Invitation	<a href="#">Appointment Invitation Layout</a> [ View Assignment ]	Operating Hours	<a href="#">Operating Hours L</a> [ View Assignment ]

2. Billing Operator - Go to profiles>search salesfroce platform>click on clone>Create Give Name profile> Billing Operator

# COSMETIC STORE MANAGEMENT



## Profiles

## 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

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 your organization.

[Login IP Ranges \[0\]](#) | [Enabled Apex Class Access \[0\]](#) | [Enabled Visualforce Page Access \[0\]](#) | [Enabled External Data Source Access \[0\]](#) | [Enabled Custom Metadata Type Access \[0\]](#) | [Enabled Custom Setting Definitions Access \[0\]](#) | [Enabled Flow Access \[0\]](#) | [Enabled](#)

### Profile Detail

Clon

View

View Users

Name	Billing Operator
User License	Salesforce Platform
Description	
Created By	Burle Sudha Rani, 22/07/2025, 12:29 am

## Page Layouts

## Standard Object Layouts

Global	Global Layout [ <a href="#">View Assignment</a> ]	
Email Application	Not Assigned [ <a href="#">View Assignment</a> ]	
Home Page Layout	Home Page Default [ <a href="#">View Assignment</a> ]	L
Account	<a href="#">Account Layout</a>	Location Group

### Step 7:- ROLES

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

Roles>Setup role>Click on expand all> Add roleafter CEO or Assistant CEO >New role is Store Headr>and then Create Add Another role>Billing Operator



# COSMETIC STORE MANAGEMENT



SETUP

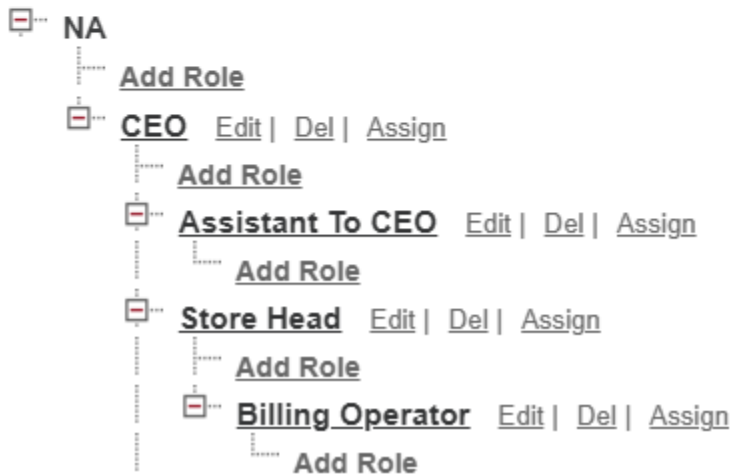
**Roles**

## Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role

### Your Organization's Role Hierarchy

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



### Step 8:- Import Data

Data Import Wizard - this tool accessible through the Setup menu, lets you import data in common standard objects such as contacts leads, accounts, as well as data in custom objects.




# COSMETIC STORE MANAGEMENT

The screenshot shows the Microsoft Excel interface with the 'Home' tab selected. The formula bar displays 'Consultant Name' for cell A1. The spreadsheet contains the following data:

	A	B	C	D	E	F	G	H
1	Consultant	Customer	Mobile Nu	Delivery Ty	Address	Email id	Products	Payment
2	Pandu	Pandu	9.87E+09	Courier	koti, rajast	pandu@gn	Eyeliners;N	UPI
3	raju	raju	5.65E+09	Self Pickup	Kochi	raju@gma	Compact;f	
4								
5								
6								

CLICK ON launch Wizard

# COSMETIC STORE MANAGEMENT



Search Setup


SetupHomeObject Manager

your data...


Using the Data Import Wizard, import up to 50,000 records at a time. Importing too many records can slow down your org for all users, especially during periods of peak usage.

## Import your data in 3 easy steps!


Launch the Data Import Wizard to import your data.




Pre-step: Prepare your data for import



Choose data to import



Edit field mapping



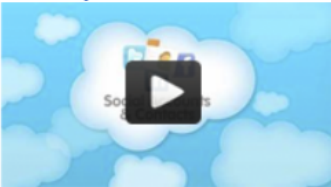
Review and start import

Launch Wizard!

### FAQ

- [How do I prepare my data for import?](#)
- [How many records can I import?](#)
- [What kind of objects can I import?](#)
- [Can I do simultaneous imports?](#)

### Data Import video series



### Additional Resources

- [Find import templates and other helpful tools](#)
- [Learn how to use the Data Import Wizard](#)

dwu00000f0ki92ab-dev-ed.develop.my.salesforce.com/ui/.../DataImporterAdminLandingPag

Choose Custom object > Consultant>add new records>Upload the Csv file

# COSMETIC STORE MANAGEMENT

Getting closer...

Choose data

Edit mapping

Start import

## Import your Data into Salesforce

You can import up to 50,000 records at a time.

[Help for this page](#)

### What kind of data are you importing?

Standard objects

Custom objects

Candidates	>
Consultants	>
Customers	>
Drop-Off Points	>

### What do you want to do?

Add new records

Match by: 

--None--

Which User field in your file designates record owners? 

--None--

Which Our Customer field in your file do you want to match against to set the Our Customer lookup field? 

--None--

### Where is your data located?

Drag CSV file here to upload

CSV

File

Choose file No file chosen

Character Code 

ISO-8859-1 (General US & Western European, ISO-LATIN-1)

Values Separated By 

Comma

Mapping All fields without error>click on next

Setup

Home

Object Manager

Search Setup

Star

Plus

Cloud

Help

Settings

Notifications

User

Almost done

Choose data

Edit mapping

Start import

## Edit Field Mapping: Consultants

Your file has been auto-mapped to existing Salesforce fields, but you can edit the mappings if you wish. Unmapped fields will not be imported.

[Help for this page](#)

Edit	Mapped Salesforce Object	CSV Header	Example	Example
<a href="#">Change</a>	Consultant Name	Consultant Name	Pandu	raju
<a href="#">Change</a>	Customer Name	Customer Name	Pandu	raju
<a href="#">Change</a>	Mobile Number	Mobile Number	9874563210	5647891256
<a href="#">Change</a>	Delivery Type	Delivery Type	Courlerr	Self Pickup
<a href="#">Change</a>	Address	Address	koti, rajasthan, gn nagar 53542	Kochi
<a href="#">Change</a>	Email id	Email id	pandu@gmail.com	raju@gmail.com

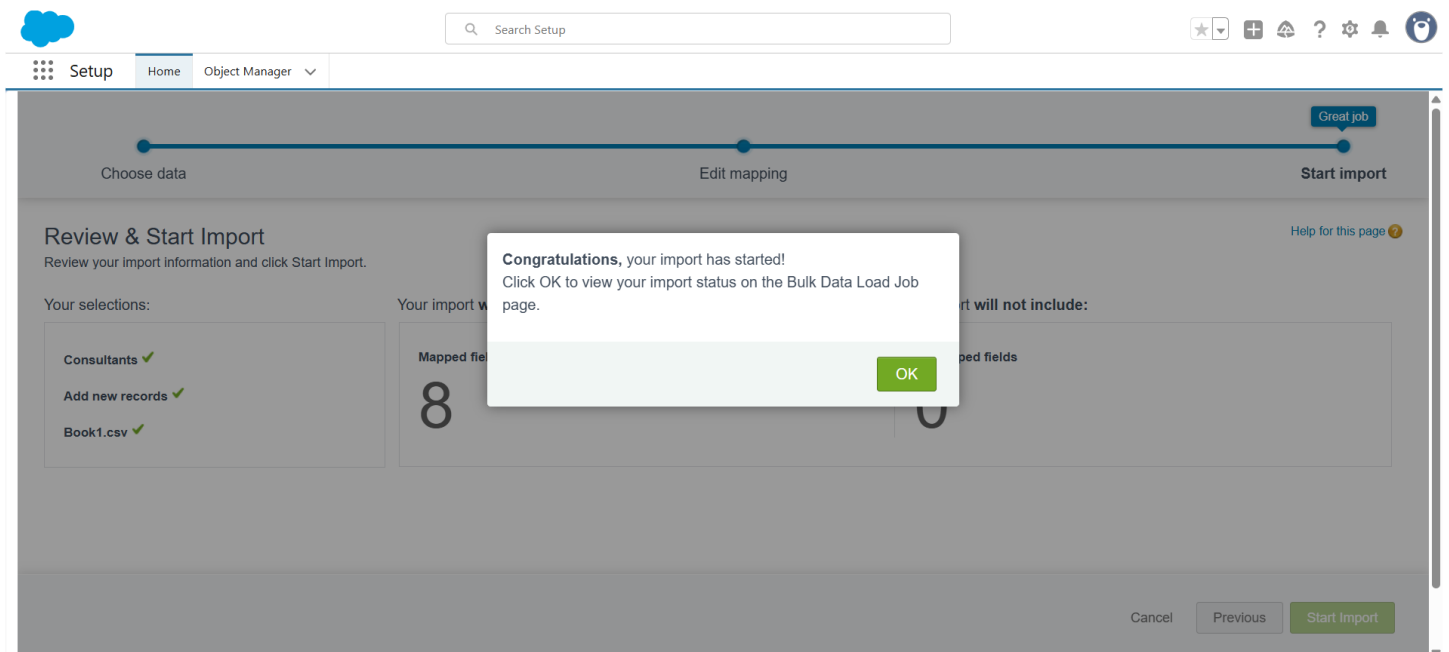
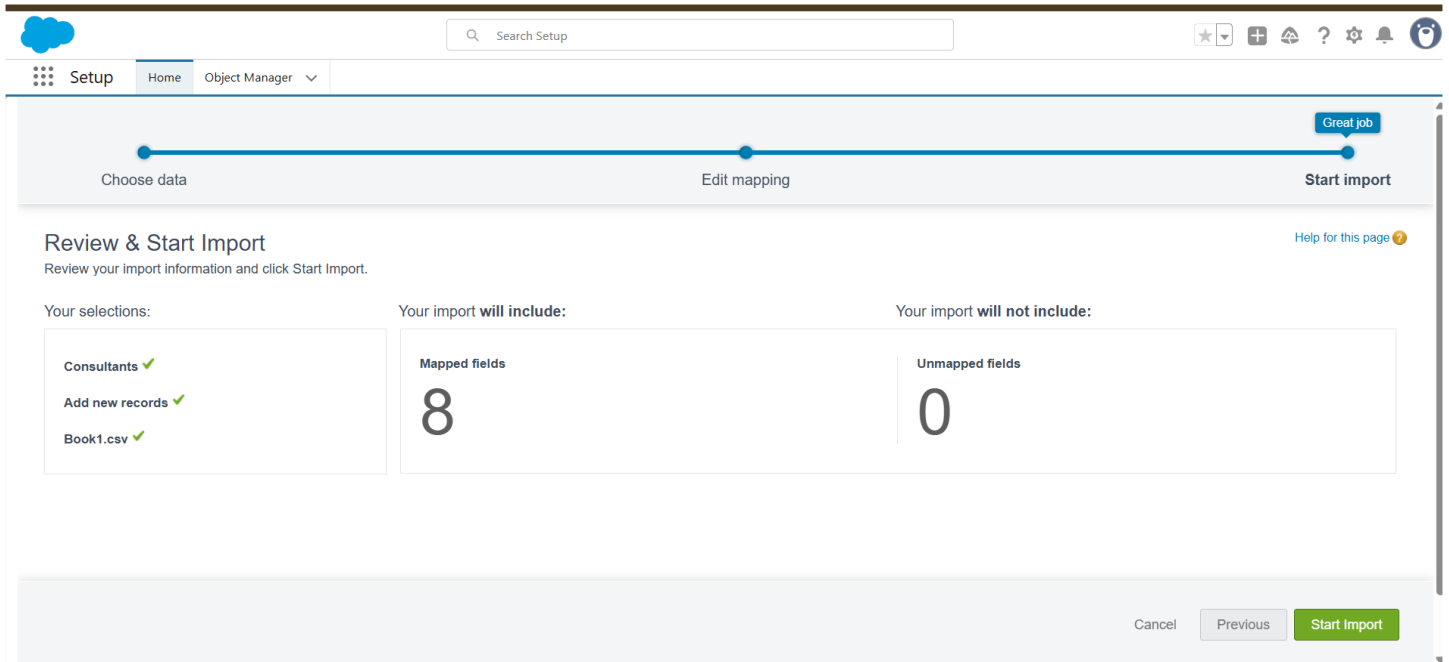
Cancel

Previous


Next

It shows 0 unmapped files click on import button

# COSMETIC STORE MANAGEMENT



# COSMETIC STORE MANAGEMENT

 **SETUP**  
**Bulk Data Load Jobs**

View the details of a bulk data load job.

[◀ Back to List: Bulk Data Load Jobs](#)

**Bulk Data Load Job Detail** Reload

Job ID	750WU00000QnZYn	Job Type	Bulk V1	Status	Closed
Submitted By	<a href="#">Burle Sudha Rani</a>	Operation	Insert	Total Processing Time (ms)	197
Start Time	01/08/2025, 9:28 am IST	Queued Batches	0	API Active Processing Time (ms)	104
End Time	01/08/2025, 9:28 am IST	In Progress Batches	0	Apex Processing Time (ms)	0
Time to Complete ((hh:mm:ss))	00:06	Completed Batches	1		
Object	Consultant	Failed Batches	0		
External ID Field		Progress	100%		
Content Type	CSV	Records Processed	2		
Concurrency Mode	Parallel	Records Failed	1		
API Version	64.0	Retries	0		

Reload

Successfully completed the import the file .

## Step 9:- Reports

Reports in salesforce is a list of records that meet a particular criterion which gives an answer to a particular question. these records are displayed as a table that can be filtered or grouped based on any field.

Reports>new report>Choose object>add filters and groupings

# COSMETIC STORE MANAGEMENT

[Urban Color](#)[Our Customers](#) ▾[Consultants](#) ▾[Retailers](#) ▾[Others](#) ▾[Reports](#) ▾[Dashboards](#) ▾

Report: Consultants

## Consultants Report

[Enable Field Editing](#)

Total Records

3

	Consultant: Consultant Name ▾	Delivery Type ▾	Products ▾	Payment ▾	Payment type ▾	Payment Type ▾
1	raju	Self Pickup	Compact; Face Pack; Nail Polish	Credit Card	Credit Card	Net Banking
2	Pandu	Courier	Eyeliner; Nail Polish	UPI	UPI	Net Banking
3	raju	Self Pickup	Compact; Face Pack; Nail Polish	Credit Card	Credit Card	Net Banking


## Step 10:- Dashboards

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

Dashboard > New Dashboard> Add Components



# COSMETIC STORE MANAGEMENT



Urban Color

Our Customers


Consultants

Retailers

Others

Reports

Dashboards



Dashboard

Consultant Dashboard

As of 22-Jul-2025, 10:51 pm - Viewing as Burle Sudha Rani

Consultants Report

Consultant: Consulta...	D...	Products	Pa...	Pa...
Pandu	Cour	Eyeliners; Nail Polish	UPI	UPI
raju	Self f	Compact; Face Pack; Ne	Credi	Credit Card
raju	Self f	Compact; Face Pack; Ne	Credi	Credit Card

SUDHARANI BURLE

burlesudharani277@gmail.com

01-08-2025