

URBAN COLOR MANAGEMENT SYSTEM

Empowering Colorful Cities

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Abstract

Urban Color Management System is a specialized Customer Relationship Management (CRM) application designed to manage and coordinate color schemes within urban environments. With the growing emphasis on aesthetic appeal in city planning, managing the diversity of colors across various urban structures—such as buildings, public spaces, and street furniture—has become a complex task. This system provides a comprehensive solution for city planners, architects, and urban developers to maintain and update color schemes effectively.

The system offers features like color palette management, project tracking, and stakeholder communication, all within an intuitive interface. By integrating with existing urban planning tools, the Urban Color Management System enhances collaboration between different teams and ensures consistent color application across projects.

Key benefits include improved efficiency in project management, better communication among stakeholders, and the ability to maintain a cohesive visual identity across urban spaces. This system aims to contribute to the creation of visually appealing cities that reflect a harmonious blend of tradition and modernity.

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1. Creating a Developer Account in Salesforce

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: Indian
 - 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.

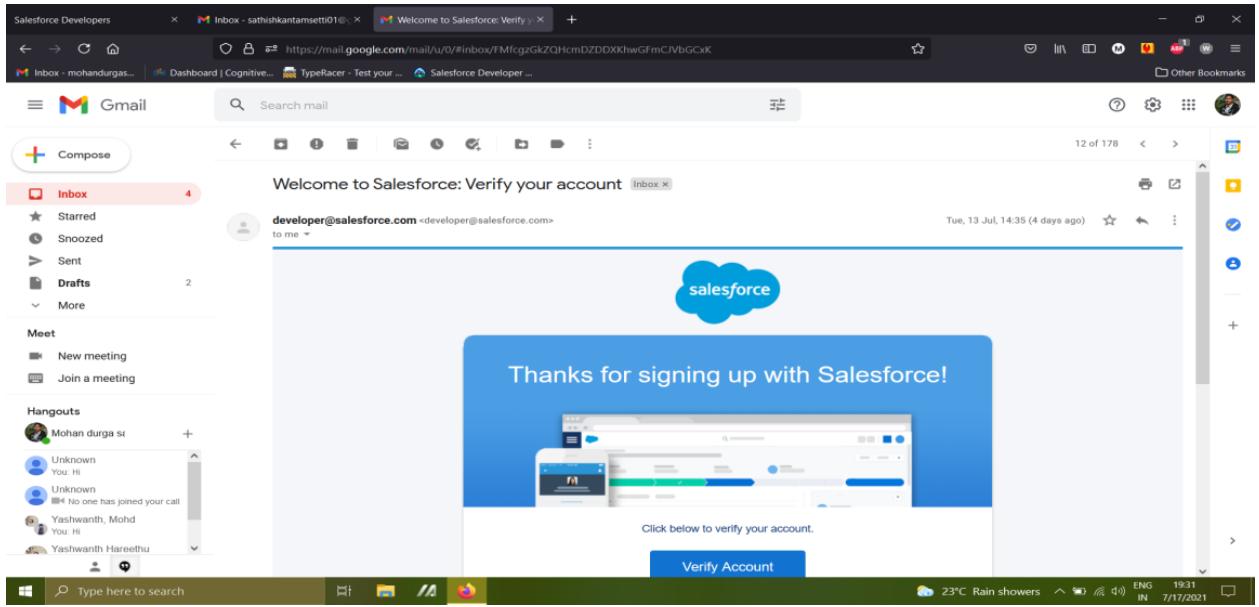
The image consists of two side-by-side screenshots. The left screenshot shows a dark-themed landing page for the Lightning Platform, featuring a monitor displaying a complex dashboard with various charts and data points. Text on the page includes: 'Explore Lightning Platform, the fastest way to create enterprise cloud apps', 'Build apps Lightning fast with drag and drop tools', 'Customize your data model with clicks', 'Go further with Apex code', 'Integrate with anything using powerful APIs', 'Stay protected with enterprise-grade security', and 'Customize UI with clicks or use Lightning Web Components'. The right screenshot shows a light-themed sign-up form titled 'Get your very own Developer Edition'. It includes fields for 'Name' (First and Last), 'Email' (Your email address), 'Role' (Your job role), 'Company' (Company Name), 'Country' (United States), and 'Postal Code'. At the bottom of the form, there is a link 'I'm ready to go'.

Step 2: Account Activation

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.Salesforce Objects

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 Urban Color Management System, examples of custom objects include **Our Customers, Consultants, Retailers, and Others.**

2.1.Creating Objects for Urban Color Management

In the Urban Color Management 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:
 - **Label:** Our Customer
 - **Plural Label:** Our Customers

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

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

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

2.2.Creating the Consultants Object

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

Step 1: Access Setup

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

Step 2: Open Object Manager

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

Step 3: Create a Custom Object

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

Step 4: Create "Consultants" Object

1. On the **Custom Object Definition page**, enter the following details:
 - **Label:** Consultant
 - **Plural Label:** Consultants

■ **Record Name:** Consultant

2. **Check the following boxes:**

■ **Allow Reports**

■ **Allow Search**

3. **Click "Save"** to create the object.

Step 5: Create a Custom Tab for "Consultants"

1. Click the "**Home**" tab and enter "**Tabs**" in the Quick Find search bar.

2. Select "**Tabs**" from the search results.

3. Under **Custom Object Tabs**, click **New**.

4. For **Object**, select Consultants.

5. For **Tab Style**, select any icon that represents your object.

6. Leave all other settings as defaults and **click Next**.

7. **Click "Next"** again, then **Save**.

2.3.Creating the Retailers Object

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

Step 1: Access Setup

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

Step 2: Open Object Manager

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

Step 3: Create a Custom Object

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

Step 4: Create "Retailers" Object

1. **On the Custom Object Definition** page, enter the following details:

- **Label:** Retailer
- **Plural Label:** Retailers
- **Record Name:** Retailer

2. **Check the following boxes:**

- **Allow Reports**
- **Allow Search**

3. Click "**Save**" to create the object.

Step 5: Create a Custom Tab for "Retailers"

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

2.4.Creating the Others Object

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

Step 1: Access Setup

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

Step 2: Open Object Manager

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

Step 3: Create a Custom Object

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

Step 4: Create "Others" Object

1. On the **Custom Object Definition page**, enter the following details:

- **Label:** Other
- **Plural Label:** Others
- **Record Name:** Other

2. Check the following boxes:

- **Allow Reports**
- **Allow Search**

3. **Click** "Save" to create the object.

Step 5: Create a Custom Tab for "Others"

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

3. Fields and Relationships

In Salesforce, an object relationship is a two-way association between two objects, allowing users to connect and interact with related data across different objects. This relationship is established by creating custom relationship fields on an object. These relationship fields enable users to view records and seamlessly access related information, providing a comprehensive view of data across the Salesforce environment.

By using relationships, Salesforce ensures that all related data is interconnected, making it easier for users to navigate between related records, improving data consistency, and enhancing the overall user experience.

3.1. Fields in the "Our Customers" Object

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

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

3.2.Fields in Consultants objects

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

S No	Field Label	Data Type
1	Customer id	Auto Number
2	Customer Name	Text
3	Mobile Number	Phone
4	Email id	Email
5	Delivery Type 1)Self Pickup 2)Courier	Picklist
6	Products 1)Lipstick	
	2)Compact 3)EyeLiner 4)FacePack 5)Lip Balm 6)Nail Polish	Multi-Picklist
7	Payment 1)Debit 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	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)

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 for the 'Consultant' object. The left sidebar has a 'Page Layouts' link highlighted with a red box and the number '1'. The main 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 'PAGE LAYOUT NAME' column shows 'Consultant Layout', the 'CREATED BY' column shows 'Hazari Ajay Kumar, 4/1/2023, 7:25 AM', and the 'MODIFIED BY' column shows 'Hazari Ajay Kumar, 6/18/2023, 10:30 PM'. A red box highlights the 'Consultant Layout' row, and the number '2' is placed below it. The URL at the bottom of the page is 'thesmartbridgecom2-dev-ed.develop.lightning.force.com/lightning/../view'.

4. Click and drag the Delivery Type and Address fields below the Phone field

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

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields

Quick Find Field Name

Section	Created By	Owner	Products
Blank Space	Customer Id	Payment	
Address	Delivery Type	Phone	
Consultant Name	Last Modified By	Preferred Item	

Information (Header visible on edit only)

Customer id	GEN-2004-001234	Owner	Sample Text
Consultant Name	Sample Text		
Phone	1-415-555-1212		
Preferred Item	Sample Text		
Products	Sample Text		
Payment	Sample Text		
Delivery Type	Sample Text		
Address	Sample Text		

5. Click on Save.

Setup Home Object Manager

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

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields

Quick Find Field Name

Section	Created By	Owner	Products
Blank Space	Customer Id	Payment	
Address	Delivery Type	Phone	
Consultant Name	Last Modified By	Preferred Item	

Information (Header visible on edit only)

Customer id	GEN-2004-001234	Owner	Sample Text
Consultant Name	Sample Text		
Phone	1-415-555-1212		
Delivery Type	Sample Text		1
Address	Sample Text		
Preferred Item	Sample Text		
Products	Sample Text		
Payment	Sample Text		

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 **Urban Color** 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. At the top, there's a search bar with 'Search Setup' and a magnifying glass icon. Below it is a navigation bar with 'Setup' and 'Home' tabs, followed by 'Object Manager'. A red arrow points to the 'App Manager' button in the search bar. Another red arrow points to the 'New Lightning App' button in the top right corner. A third red arrow points to the 'Clone Apps(Beta)' link below the search bar. The main area displays a table of 35 items, sorted by app name, with columns for 'App Name', 'Developer Name', 'Description', 'Last Modified', 'App Type', and 'V...'. The table includes rows for various standard Salesforce apps like 'All Tabs', 'Analytics Studio', 'App Launcher', etc.

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**.

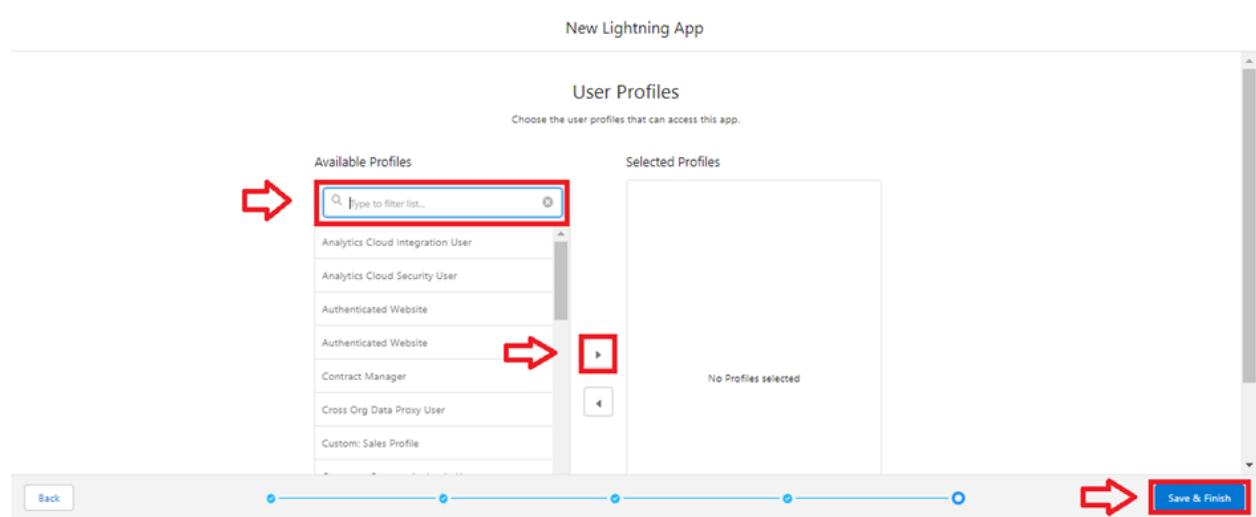
The screenshot shows the 'New Lightning App' configuration page. At the top, it says 'New Lightning App'. Below that is a section titled 'App Details & Branding' with the sub-instruction 'Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.' The form contains several fields:

- App Name:** A required field with the placeholder 'Name your app...' (highlighted with a red arrow).
- Developer Name:** A required field with the placeholder 'Enter a developer name...'.
- Description:** An optional field with the placeholder 'Enter a description...'.
- Image:** A section for uploading an image, featuring a 'Upload' button and a preview area.
- Primary Color Hex Value:** A color picker set to '#0070D2'.
- Org Theme Options:** A checkbox labeled 'Use the app's image and color instead of the org's custom theme'.

 At the bottom right of the page is a large red arrow pointing to the 'Next' button.

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.**

The screenshot shows the Salesforce Setup interface. In the top navigation bar, 'Setup' is selected. The main search bar contains 'prof'. On the left sidebar, 'Profiles' is selected under the 'Users' category. The main content area is titled 'Profiles' and shows a 'Clone Profile' dialog. The dialog has a message: 'You must select an existing profile to clone from.' It lists 'Existing Profile' as 'Standard User' and 'User License' as 'Salesforce'. The 'Profile Name' field is filled with 'Store Supervisor'. At the bottom of the dialog are 'Save' and 'Cancel' buttons. A help link 'Help for this Page' is visible in the top right corner of the dialog.

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 Urban Color.

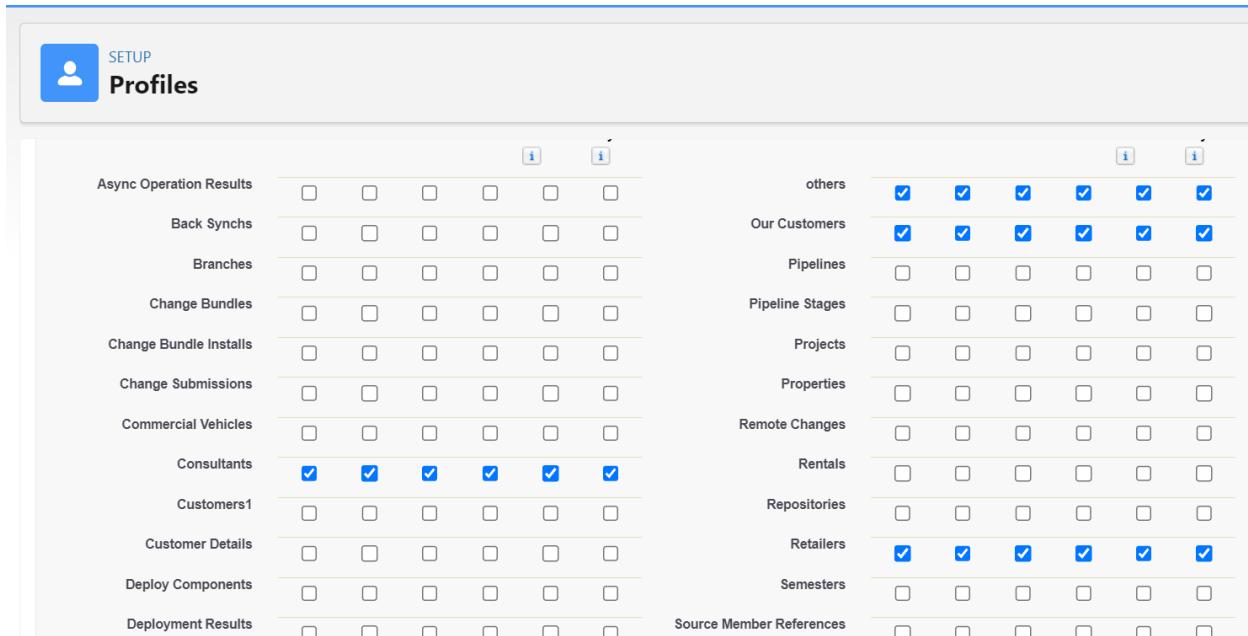
9. Click on Save.

To Create a New Profile:

1. Go to Setup.
2. Type Profiles in the Quick Find box.
3. Click on Profiles.
4. Clone the desired profile (Standard User is preferable).
5. Enter the Profile Name.

6. Click Save.

7. While still on the profile page, click Edit.



The screenshot shows the Salesforce Setup Profiles page. The top navigation bar includes 'SETUP' and 'Profiles'. Below the navigation, there are two large tables of checkboxes representing profile access to various objects.

Left Table (Access to Objects):

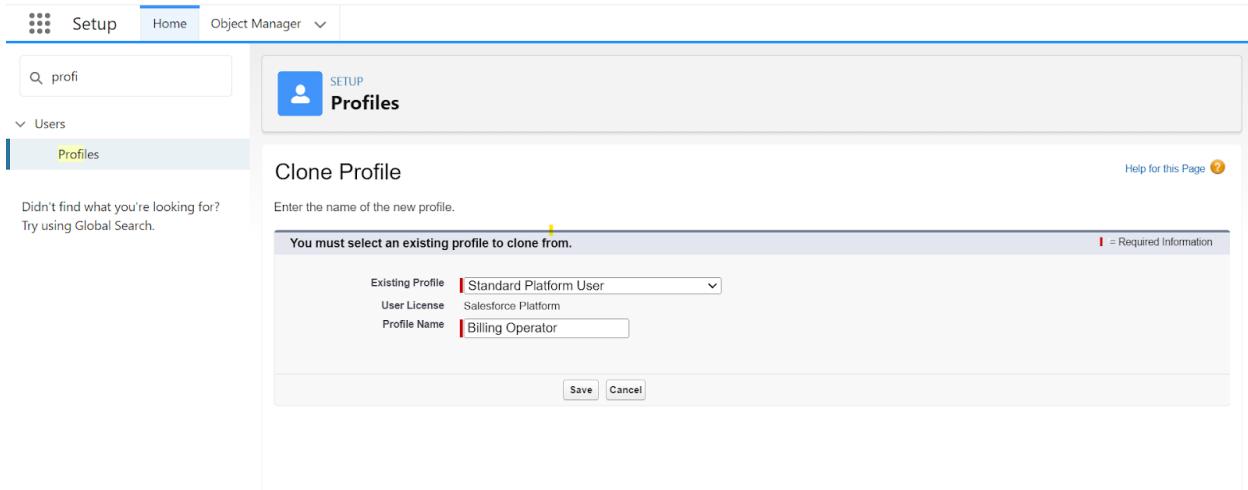
	Async Operation Results	Back Synchs	Branches	Change Bundles	Change Bundle Installs	Change Submissions	Commercial Vehicles	Consultants	Customers1	Customer Details	Deploy Components	Deployment Results
others	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>						
Our Customers	<input checked="" type="checkbox"/>											
Pipelines	<input type="checkbox"/>											
Pipeline Stages	<input type="checkbox"/>											
Projects	<input type="checkbox"/>											
Properties	<input type="checkbox"/>											
Remote Changes	<input type="checkbox"/>											
Rentals	<input type="checkbox"/>											
Repositories	<input type="checkbox"/>											
Retailers	<input checked="" type="checkbox"/>											
Semesters	<input type="checkbox"/>											
Source Member References	<input type="checkbox"/>											

Right Table (Access to Objects):

	others	Our Customers	Pipelines	Pipeline Stages	Projects	Properties	Remote Changes	Rentals	Repositories	Retailers	Semesters	Source Member References
others	<input checked="" type="checkbox"/>											
Our Customers	<input checked="" type="checkbox"/>											
Pipelines	<input type="checkbox"/>											
Pipeline Stages	<input type="checkbox"/>											
Projects	<input type="checkbox"/>											
Properties	<input type="checkbox"/>											
Remote Changes	<input type="checkbox"/>											
Rentals	<input type="checkbox"/>											
Repositories	<input type="checkbox"/>											
Retailers	<input checked="" type="checkbox"/>											
Semesters	<input type="checkbox"/>											
Source Member References	<input type="checkbox"/>											

Similarly, Create an Operator Profile:

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



The screenshot shows the 'Clone Profile' page in the Salesforce Setup. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar shows 'Users' and 'Profiles' (which is selected). A global search bar at the top left contains 'prof'. The main content area has a title 'Clone Profile' and a note 'Enter the name of the new profile.' Below this is a message 'You must select an existing profile to clone from.' followed by a required information indicator (a red exclamation mark) and the text '= Required Information'. A form section contains three fields: 'Existing Profile' (set to 'Standard Platform User'), 'User License' (set to 'Salesforce Platform'), and 'Profile Name' (set to 'Billing Operator'). At the bottom are 'Save' and 'Cancel' buttons.

SETUP

Profiles

Profile Edit
Billing Operator

Set the permissions and page layouts for this profile.

Profile Edit

Name: Billing Operator

User License: Salesforce

Description:

Custom Profile:

Save **Save & New** **Cancel**

SETUP

Profiles

Allow OAuth for employees [i](#)

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Lockout effective period: 15 minutes

Obscure secret answer for password resets

Require a minimum 1 day password lifetime

Don't immediately expire links in forgot password emails [i](#)

Save **Save & New** **Cancel**

3. Click on Save.

7. Setup Roles

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

Setup Roles

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

10. **Click** on **Save**.

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

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup' (which is selected), 'Home', and 'Object Manager'. A search bar contains the text 'roles'. On the left, a sidebar menu is open under 'Users', showing 'Roles' (which is selected and highlighted in yellow). Other options include 'Feature Settings', 'Sales' (with 'Contact Roles on Contracts' and 'Contact Roles on Opportunities'), 'Service', 'Case Teams' (with 'Case Team Roles'), and 'Contact Roles on Cases'. The main content area is titled 'Role Edit' and shows a 'New Role' form. The form fields are as follows:

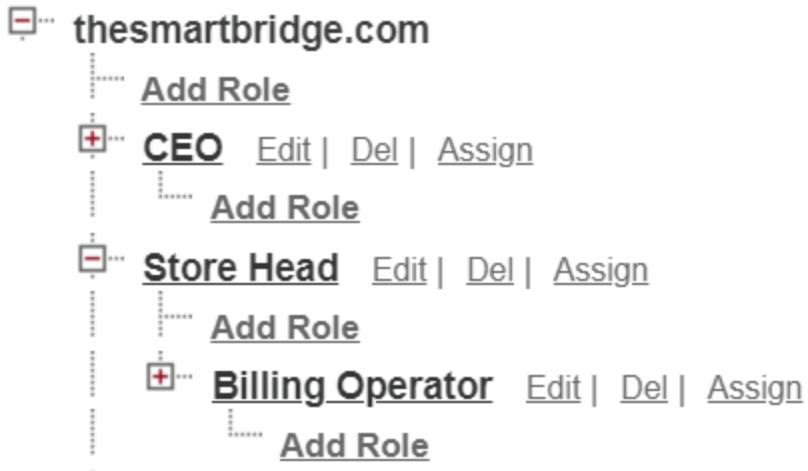
Role Edit	
Label	Store Head
Role Name	Store_Head
This role reports to	thesmartbridge.com
Role Name as displayed on reports	(empty field)

At the bottom of the form are three buttons: 'Save', 'Save & New', and 'Cancel'.

The screenshot shows the Salesforce Setup interface. The left sidebar has 'Setup' selected. Under 'Users', 'Roles' is selected. The main area shows a 'Role Edit' screen for a new role named 'Billing Operator'. The 'Label' field contains 'Billing Operator', the 'Role Name' field contains 'Billing_Operator', and the 'This role reports to' dropdown is set to 'Store Head'. Buttons at the bottom include 'Save', 'Save & New', and 'Cancel'. A help link 'Help for this Page' is in the top right.

Your Organization's Role Hierarchy

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



8. Users

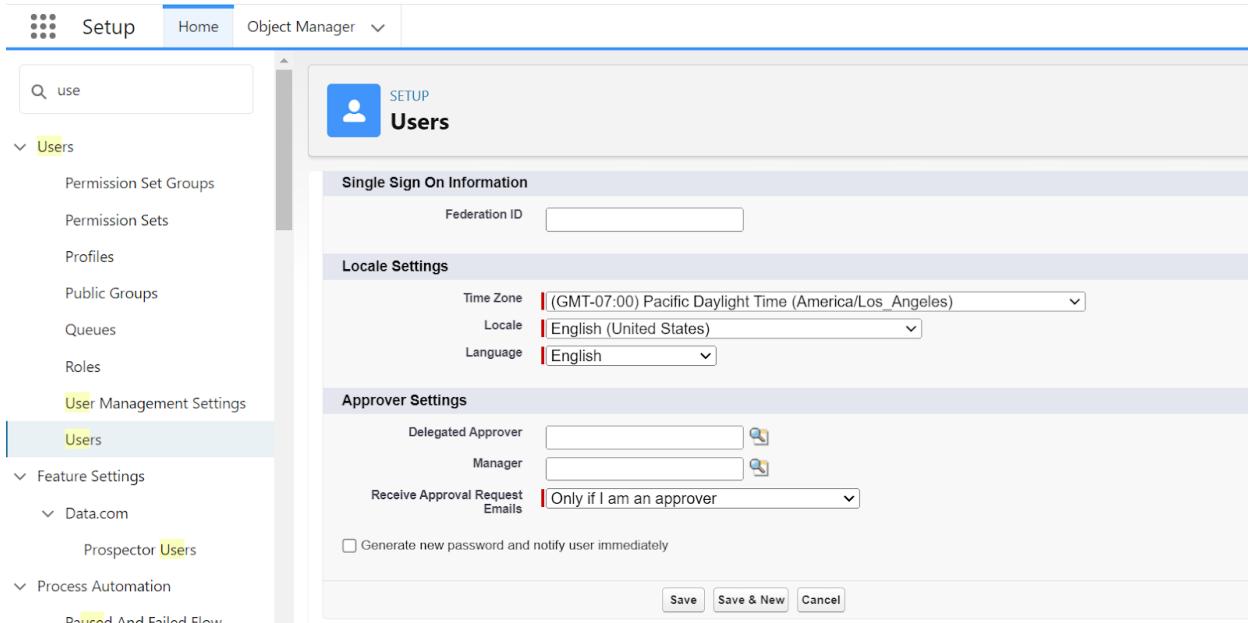
A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account.

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 Amar K 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**.

The screenshot shows the Salesforce Setup interface with the following details:

- Header:** Setup, Home, Object Manager
- Search Bar:** Q use
- Left Sidebar:** Users (selected), Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings (selected), Users (selected), Feature Settings, Data.com, Prospector (Users), Process Automation, Paused And Failed Flow.
- Current Screen:** SETUP -> Users -> User Edit
- User Edit Form:**
 - General Information:** First Name: Amar, Last Name: k, Alias: ak, Email: mailid@gmail.com, Username: amark2133@salesforce.com, Nickname: User167161323313747430, Title: Store Supervisor, Company: (empty), Department: (empty), Division: (empty).
Role: Store Head, User License: Salesforce, Profile: Store Supervisor, Active: checked.
Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Data.com User Type: --None--.



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 John Teddy 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 **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.
8. Fill in the fields (**First Name**, **Last Name**, **Alias**, **Email ID**, **Username**, **Nickname**, **Role**, **User License**, **Profile**).
9. Click **Save**.

User Edit

General Information

First Name	John	Role	Billing Operator
Last Name	Teddy	User License	Salesforce Platform
Alias	Tedd	Profile	Billing Operator
Email	teddyjohn@gmail.com	Active	<input checked="" type="checkbox"/>
Username	johnteddy@salesforce.com	Marketing User	<input type="checkbox"/>
Nickname	User167160299867441831	Offline User	<input type="checkbox"/>
Title	Vehicle Manager	Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>

Data.com Monthly Addition Limit: 300

Accessibility Mode (Classic Only):

High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling:

Debug Mode:

Make Setup My Default Landing Page:

Single Sign On Information

Federation ID: []

Locale Settings

Time Zone: (GMT-07:00) Pacific Daylight Time (America/Los_Angeles)

Locale: English (United States)

Language: English

Approver Settings

Delegated Approver: []

Manager: []

Receive Approval Request Emails: Only if I am an approver

Generate new password and notify user immediately

Buttons

Save | Save & New | Cancel

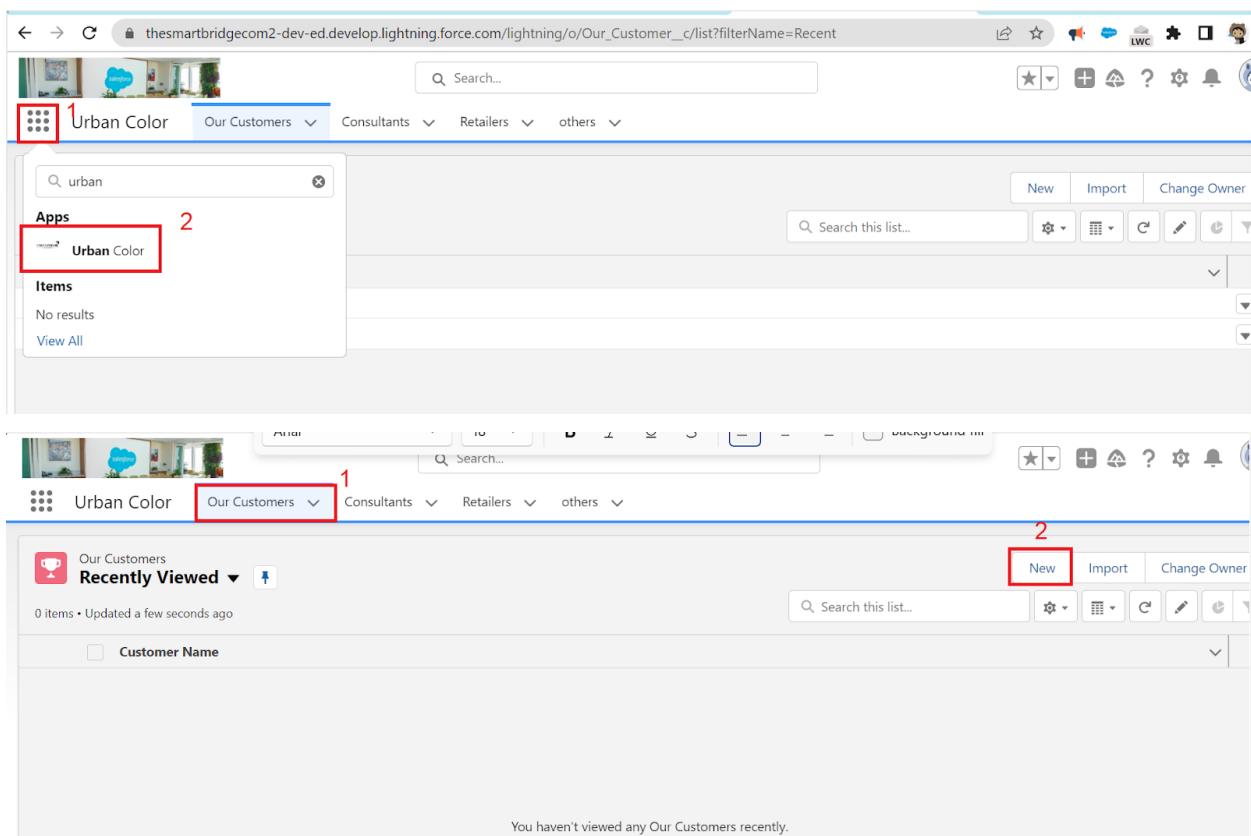
9. User Adoption

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:

1. Click on the **App Launcher** on the left side of the screen.
2. Search for **Urban Color** 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 **Urban Color** 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**.

The screenshot shows two main sections of the Salesforce application.

Top Section (Record Creation):

- Information Tab:** A red box highlights the "Customer Name" field, which is empty. A red number "1" is placed above the field.
- Owner:** Shows Hazari Ajay Kumar.
- Customer id:** Placeholder text.
- *Phone:** Placeholder text.
- Email id:** Placeholder text.

Bottom Section (List View):

- Tab Navigation:** The "Our Customers" tab is selected, highlighted by a red box and a red number "1". Other tabs include Consultants, Retailers, and others.
- Recently Viewed List:** Shows a list of 2 items: Suresh (highlighted by a red box and a red number "2") and Kamal.
- Buttons:** New, Import, Change Owner, Save & New, and Save.

 Our Customer
Suresh

Related	Details
Customer Name	
Suresh	
Customer id	
5	
Phone	
97583873728	
Email id	
suresh@gmail.com	
Address	
Hyderabad	
Additional Information	
Customer	

Delete Record (Our Customer)

1. Click on the App Launcher on the left side of the screen.
2. Search for Urban Color 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.

1

2

3

Our Customers

Recently Viewed

Customer Name

Suresh

Kamal

New Import Change Owner

Search this list...

Edit

Delete

Change C Delete

Our Customers

Recently Viewed

Customer Name

Suresh

Kamal

New Import Change Owner

Search this list...

Delete Our Customer

Are you sure you want to delete this Our Customer?

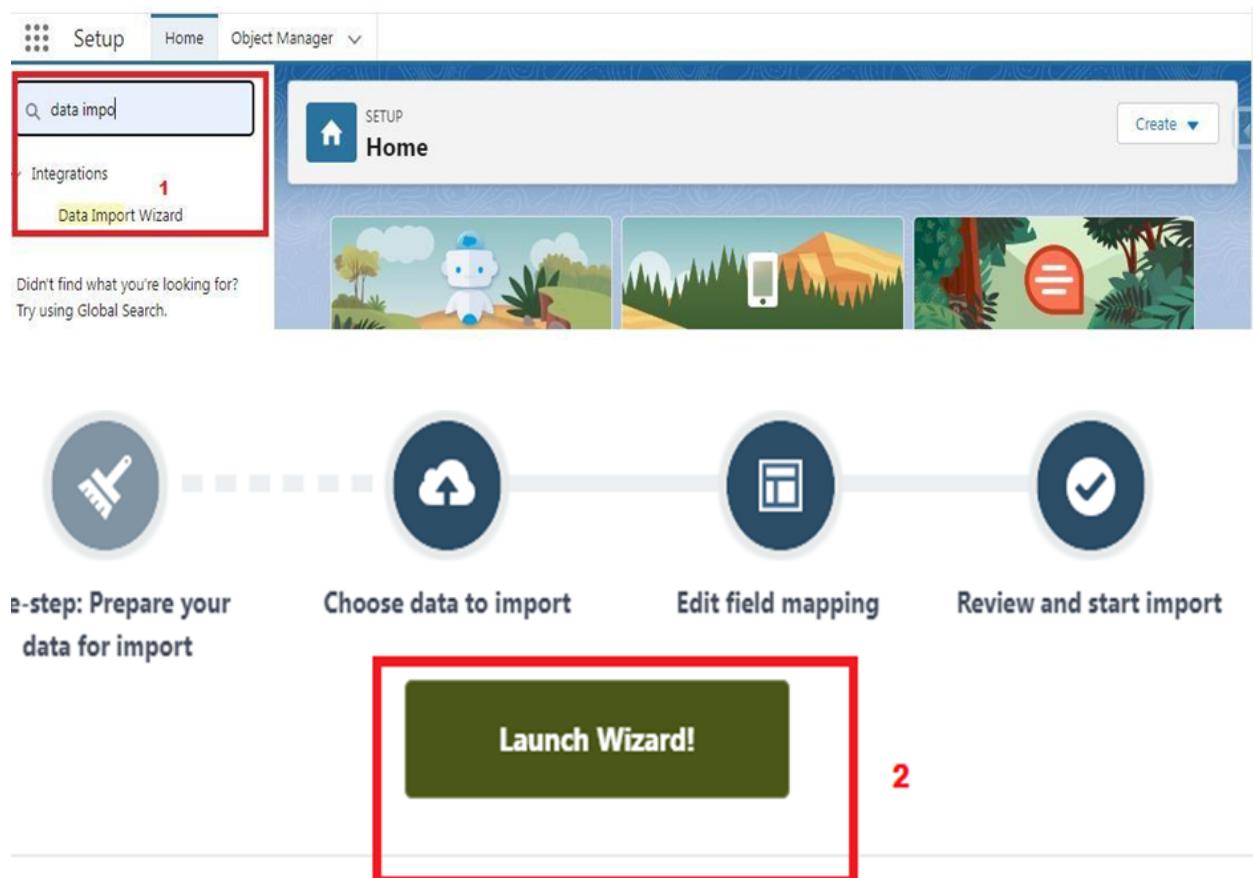
Cancel Delete

10. Import Data

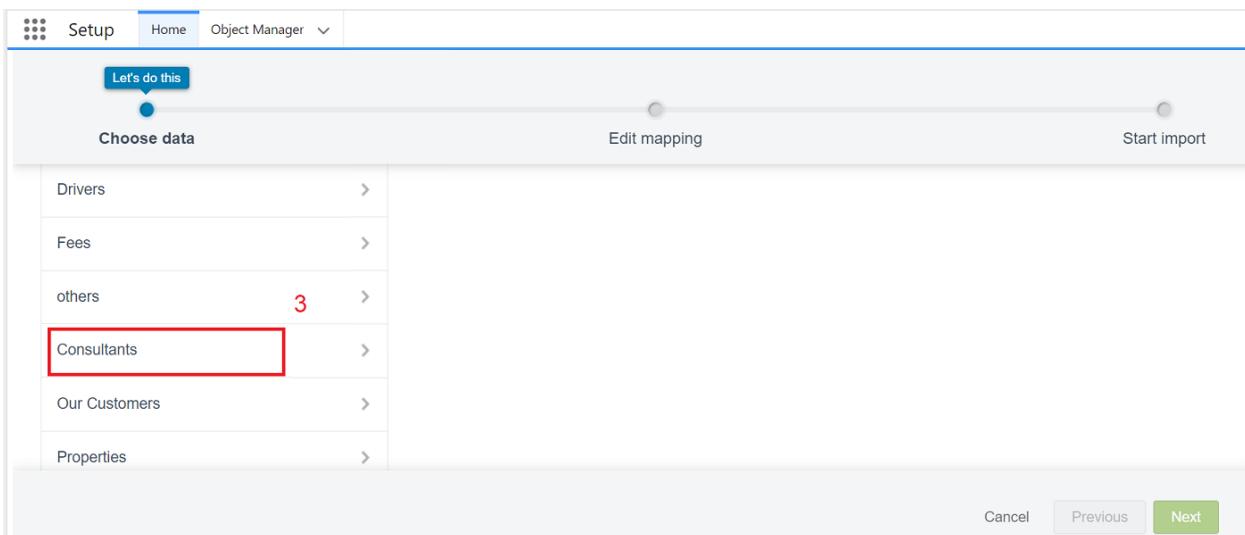
Data Import Wizard—This tool, accessible through the Setup menu, allows you to import data into common standard objects such as Contacts, Leads, Accounts, as well as data into custom objects.

To Import Data

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



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



5. Select Add New Records.

Import your Data into Salesforce

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

What kind of data are you importing? ?

Standard objects

Custom objects

Attendees

Buyers

What do you want to do? ?

Add new records

4

Update existing records

Add new and update existing records

Where is your data located? ?

6. Click CSV and choose the file **Consultant_CSV** which was created earlier. Click Next.

Choose data

What kind of data are you importing? ?

Standard objects Custom objects

- Attendees
- Buyers
- Customers
- Departments**

What do you want to do? ?

Add new records ✓

Match by: ?
--None--

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

Trigger workflow rules and processes? ?
 Trigger workflow rules and processes for new and updated records

Where is your data located? ?

Drag CSV file here to upload

CSV

5

Cancel Previous **Next**

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

Setup Home Object Manager ?

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	Example
Change	Consultant Name	Consultant 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		Hyderabad	
Change	Products	Products	Lipstick	Compact	Face Pack
Change	Payment	Payment	Cash	UPI	Credit Card
Change	Email	Email		ajith@gmail.com	Babu34@gmail.com

Cancel Previous **Next**

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

Choose data

Edit mapping

Great job

Start import

Help for this page ⓘ

Review & Start Import

Review your import information and click Start Import.

Your selections:

- Consultants ✓
- Add new records ✓
- Consultants - Sheet1 (2).csv ✓

Your import **will include:**

Mapped fields **7**

Your import **will not include:**

Unmapped fields **0**

Cancel Previous **Start Import**

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.

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
View Request	View Result	7512w00000Xqrar	6/19/2023, 11:05 PM	6/19/2023, 11:05 PM	103	52	0	9	0

11. Make sure you have **0 records** under the Records Failed column.

Note: Perform **Field Mapping carefully**. Here is the formatted text for your document.

11.What are 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 Urban Color App.
3. Click the Reports tab.

The screenshot shows the Salesforce Setup Home page. On the left, there's a sidebar with various links like Setup, Home, Object Manager, and a search bar. The main area has a heading 'SETUP Home' and three cards: 'Get Started with Einstein Bots', 'Mobile Publisher', and 'Real-time Collaborative Docs'. Below these cards is a section titled 'Most Recently Used' with a table showing 'Customer Details' under 'NAME' and 'Custom Field Definition' under 'TYPE'. A red box labeled '2' highlights the 'Urban Color' app in the sidebar's 'Apps' list.

4. Click New Report.

The screenshot shows the Salesforce Reports page. At the top, there are navigation tabs: 'Urban Color', 'Our Customers', 'Consultants', 'Retailers', 'others', 'Reports' (which is highlighted with a red box and labeled '1'), and 'Dashboards'. Below the tabs is a search bar and a 'New Report' button (also highlighted with a red box and labeled '2'). The main area shows a table with columns: 'REPORTS', 'Report Name', 'Description', 'Folder', 'Created By', 'Created On', and 'Subscribed'.

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**.

REPORT ▾

New Consultants Report ▾ Consultants

Fields > 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.

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

Update Preview Automatically

7. Click the drop-down option on the Payment column and select Bucket This Column.

REPORT ▾

New Consultants Report ▾ Consultants

Fields > 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.

1 Sort Ascending
2 Sort Descending
3 Group Rows by This Field
4 Group Columns by This Field
5 Bucket This Column 2
6 Show Unique Count
7 Move Left
8 Move Right
9 Remove Column

Update Preview Automaticall

8. Name the bucket Payment Type.

Edit Bucket Column

* Field

* Bucket Name

All Values (4)	Search Values	
Unbucketed Values (4)	VALUE	BUCKET
	<input type="checkbox"/> Credit Card	
	<input type="checkbox"/> Debit Card	
	<input type="checkbox"/> Upi	
	<input type="checkbox"/> Cash	

Bucket remaining values as Other

9. Click Add Bucket and name it NetBanking.

10. Click Add Bucket and name it Cash.

Edit Bucket Column

* Field * Bucket Name

Payment	X	Payment type
---------	---	--------------

All Values (4)	Search Values
Bucket Name	<input type="text"/>
Unbucketed Values (4)	<input type="checkbox"/> VALUE BUCKET <input type="checkbox"/> Credit Card <input type="checkbox"/> Debit Card <input type="checkbox"/> Upi <input type="checkbox"/> Cash
<input type="checkbox"/> Bucket remaining values as Other	

1 Add Bucket **2** Move To ▾

Cancel **Apply**

11. Click on All Values, select Credit Card, Debit Card, UPI, and move them to NetBanking.

Edit Bucket Column

* Field * Bucket Name

Payment	X	Payment type
---------	---	--------------

All Values (4)	Search Values
Net Banking (0)	<input type="checkbox"/> VALUE BUCKET
Cash (0)	<input type="checkbox"/> Credit Card <input type="checkbox"/> Debit Card <input type="checkbox"/> Upi <input type="checkbox"/> Cash
<input type="checkbox"/> Bucket remaining values as Other	

Unbucketed Values (4)

Add Bucket Move To ▾

Cancel **Apply**

Edit Bucket Column

* Field * Bucket Name

All Values (4)	Search Values
Net Banking (0)	<input type="checkbox"/> Credit Card
Cash (0)	<input type="checkbox"/> Debit Card
Unbucketed Values (4)	<input type="checkbox"/> Upi
	<input type="checkbox"/> Cash

Bucket remaining values as Other

Add Bucket Move To ▾

Edit Bucket Column

* Field * Bucket Name

All Values (4)	Search Values
Net Banking (0)	<input type="checkbox"/> Credit Card
Cash (0)	<input type="checkbox"/> Debit Card
Unbucketed Values (4)	<input type="checkbox"/> Net Banking
	Cash
	Unbucketed Values
	New Bucket

Bucket remaining values as Other

Add Bucket Move To ▾

Cancel Apply

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.

The screenshot shows the configuration interface for a report titled "New Consultants Report". The interface has two main sections: "Fields" on the left and a report preview on the right.

Fields Section:

- Groups:** Contains "GROUP ROWS" and "Payment type". Both are highlighted with red boxes.
- Columns:** Contains "Add column...", "Consultant: Consultant Name", "Delivery Type", "Products", and "Payment".

Report Preview Section:

- Header:** Shows "Previewing a limited number of records. Run the report to see everything." and sorting icons for "Payment type" (up), "Consultant: Consultant Name" (down), "Delivery Type" (down), "Products" (down), and "Payment" (down).
- Data:** The report displays data grouped by payment type:
 - Net Banking (7):** Ajith (Courier, Compact, Upi), Babu (Self Pickup, Face Pack, Credit Card), Chitra (Courier, Eye Liner, Debit Card), Swathi (Courier, Nail Polish, Upi), Prasad (Self Pickup, Eye Liner, Upi), Ajay Kumar (Courier, Lip Balm, Debit Card), Sandeep (Courier, Eye Liner, Upi).
 - Cash (2):** Dev Raj (Self Pickup, Lipstick, Cash), Shankar (Self Pickup, Face Pack, Cash).
- Subtotal:** Total (9) rows.

15.**Click Refresh.**

16.**Click Save and Run.**

17.Give the report a name, e.g., Consultant Report.

Save Report

1

* Report Name Consultants Report

Report Unique Name ⓘ
Consultants_Report_hvb

Report Description

2

Folder Private Reports	Select Folder
---------------------------	---------------

3

Cancel Save

11.2. View Report

1. Click on the **App Launcher** on the left side of the screen.
2. Search for **Urban Color App** and click on it.

The screenshot shows the Salesforce App Launcher interface. A red box labeled '1' highlights the 'Setup' icon at the top left. A red box labeled '2' highlights the search bar where 'Urban Color' has been typed. The search results list the 'Urban Color' app under the 'Apps' category. The main content area displays three featured apps: 'Get Started with Einstein Bots', 'Mobile Publisher', and 'Real-time Collaborative Docs'. Below these is a section titled 'Most Recently Used' which lists 'Customer Details' as the most recent item.

3. Click the Reports tab.
4. Click on the **Urban Color Report** to view the records.

Urban Color Our Customers Consultants Retailers others Reports Dashboards

Reports Recent 4 items

REPORTS Recent Report Name Description Folder Created By Created On Subscribed

Report Name	Description	Folder	Created By	Created On	Subscribed
Consultants Report	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Private Reports	Hazari Ajay Kumar	12/17/2022, 7:50 PM	
Sample Flow Report: Screen Flows		Public Reports	Automated Process	4/12/2023, 11:46 PM	
Opportunities Details		Private Reports	Hazari Ajay Kumar	2/2/2023, 10:39 PM	
Rental New 1		Public Reports	Hazari Ajay Kumar		

Recent Created by Me Private Reports Public Reports All Reports

FOLDERS All Folders Created by Me Shared with Me

FAVORITES All Favorites

3 4

Search recent reports... New Report New Folder

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 Urban Color application:

2. Open the Urban Color Application: Launch the application and navigate to the Dashboards tab.

3. Create a New Dashboard:

- Click on the "New Dashboard" button.

4. Name Your Dashboard:

- Enter "**Consultant Dashboard**" in the name field.
- Click "Create."

The screenshot shows the Urban Color application interface. At the top, there is a navigation bar with links: Urban Color, Our Customers, Consultants, Retailers, others, Reports, and Dashboards. The Dashboards link is highlighted with a red box and has a dropdown arrow. Below the navigation bar, there is a search bar labeled "Search recent dashboards..." and a "New Dashboard" button, both of which are also highlighted with red boxes. A "New Folder" button and a refresh icon are also visible. The main area is titled "New Dashboard". It contains fields for "Name" (with "Consultant Dashboard" entered), "Description" (empty), "Folder" (set to "Private Dashboards"), and "Select Folder" (button). At the bottom, there are "Cancel" and "Create" buttons, with the "Create" button highlighted with a red box.

5. Add Components to the Dashboard:

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

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...

Consultants Report
Hazari Ajay Kumar - [REDACTED] 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

6. Choose Data Visualization:

- Pick a **visualization type** (e.g., chart, table) that best suits your data and needs.
- Click "Add."

Add Component

Report

Consultants Report X

Use chart settings from report i

Display As

Payment type

X-Axis

Record Count

Preview

Consultants Report

Record Count

0 2 4 6 8

Net Banking 7

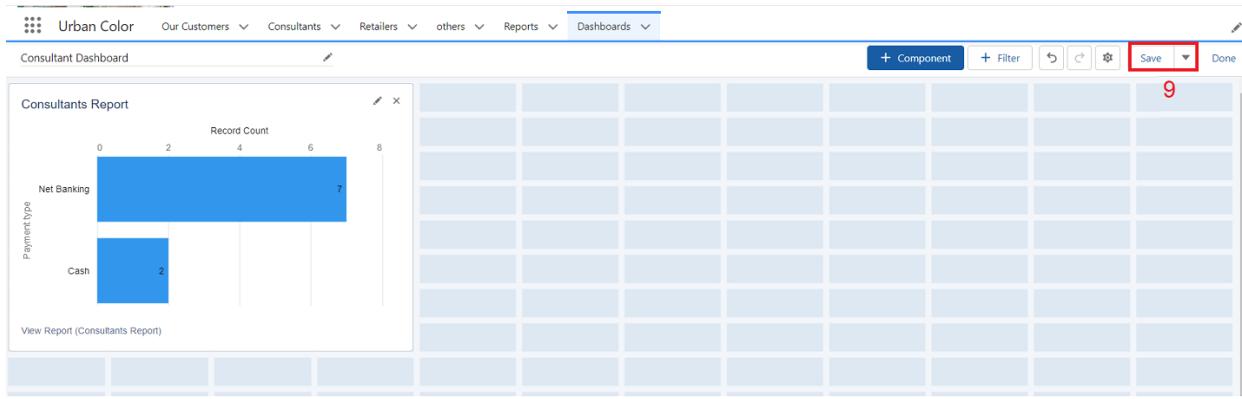
Cash 2

View Report (Consultants Report)

Cancel Add

7. Save Your Dashboard:

- After configuring the components and visualizations, click "Save" to finalize your dashboard.



12.2. View Dashboard

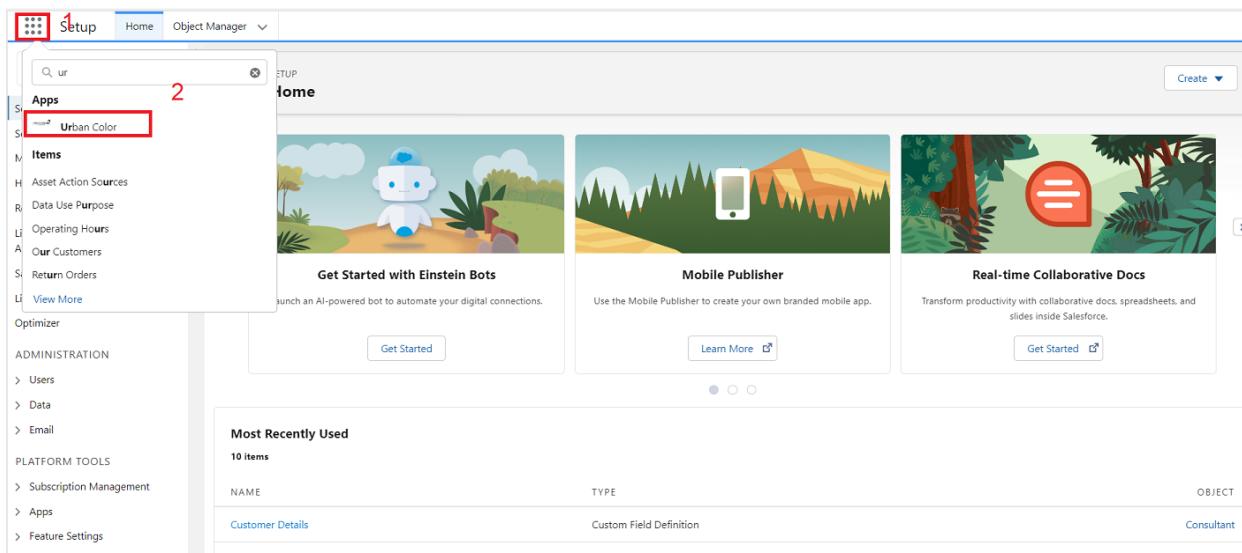
To view the dashboard, follow these steps:

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.

The screenshot shows a user interface for managing dashboards. At the top, there is a navigation bar with links: Urban Color, Our Customers, Consultants, Retailers, others, Reports, Dashboards (which is highlighted with a red box and has a red number '3' above it), and a search bar. Below the navigation is a section titled "Dashboards Recent" with a count of "3 items". A table lists the dashboards:

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Consultant Dashboard		Private Dashboards	Hazari Ajay Kumar	6/20/2023, 10:46 PM	
	Opportunities Details		Private Dashboards	Hazari Ajay Kumar	4/12/2023, 11:57 PM	
	Oppurtunity details		Private Dashboards	Hazari Ajay Kumar	4/12/2023, 11:48 PM	

On the left side, there are filters for "Created by Me", "Private Dashboards", and "All Dashboards". At the bottom, there is a section labeled "FOLDERS".