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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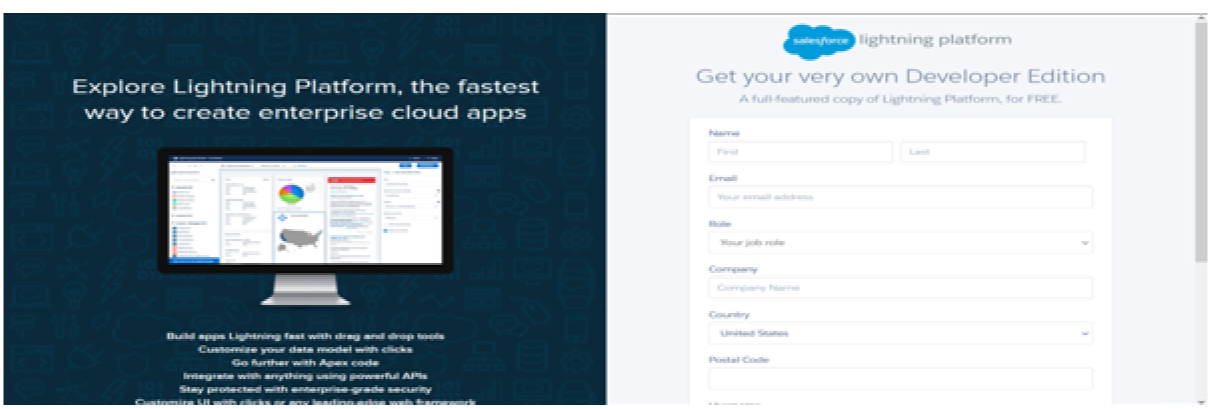
1.Creating a Developer Account in Salesforce

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.

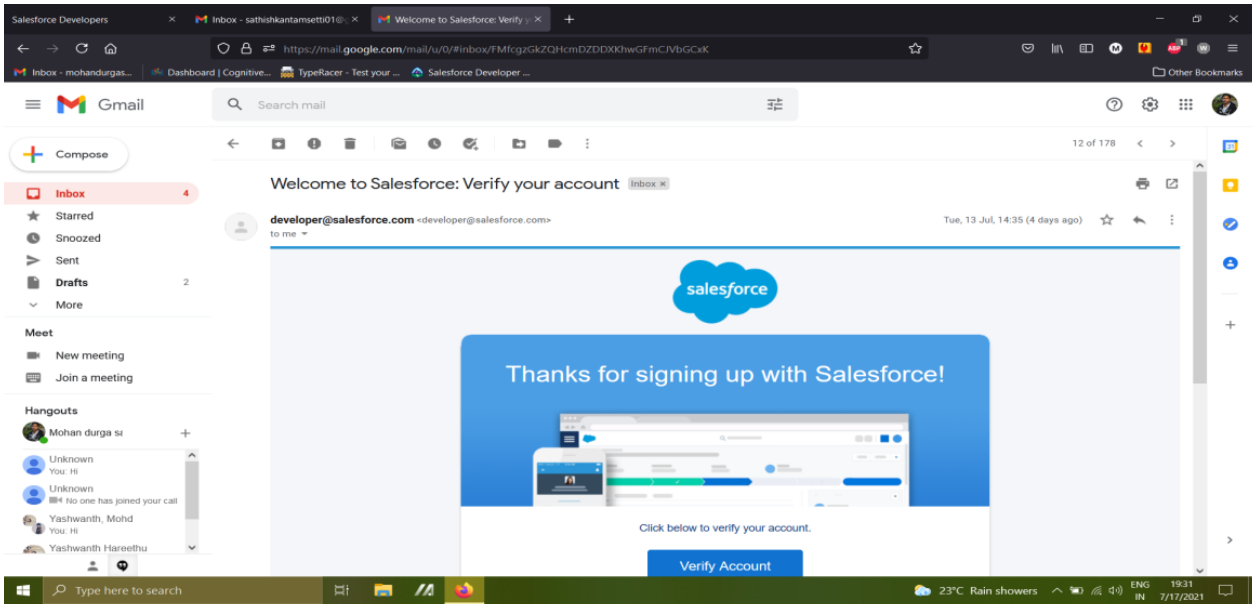


Step 2: Account Activation

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.](login.salesforce.com)
2. **Enter your username and password** created during the sign-up process.
3. **Login to a**ccess 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 6)Nail Polish	Multi-Picklist
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:

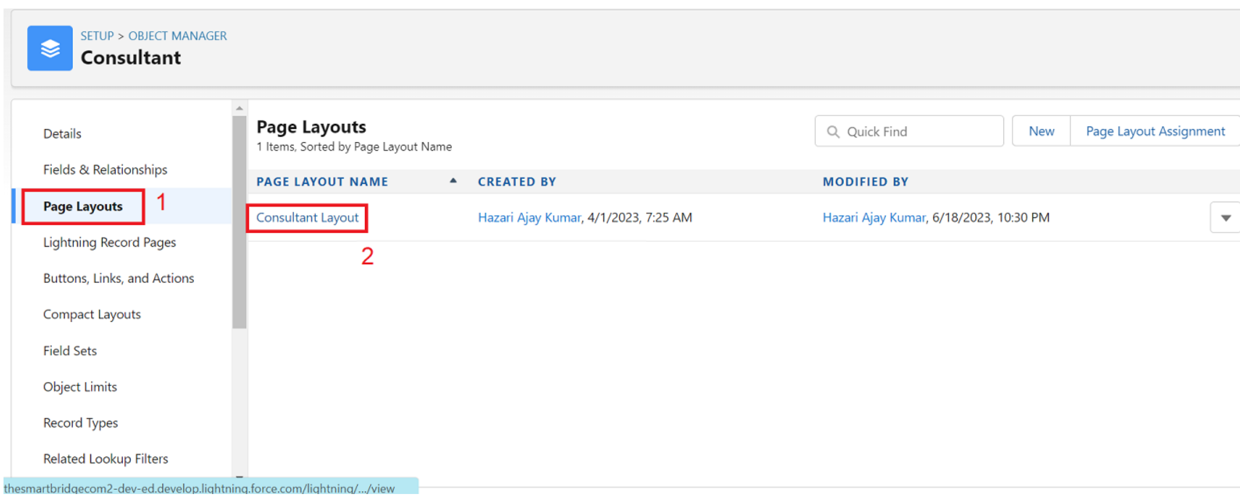
S No	Field Label	Data Type
1	Name	Text
2	Employee 1)Company Employee 2)Staff 3)Special Reference	Picklist
3	Coupon	Text
4	Products 1)Lipstick 2)Compact 3)EyeLiner 4)FacePack 5)Lip Balm 6)Nail Polish	Multi-Picklist

4.Page Layouts

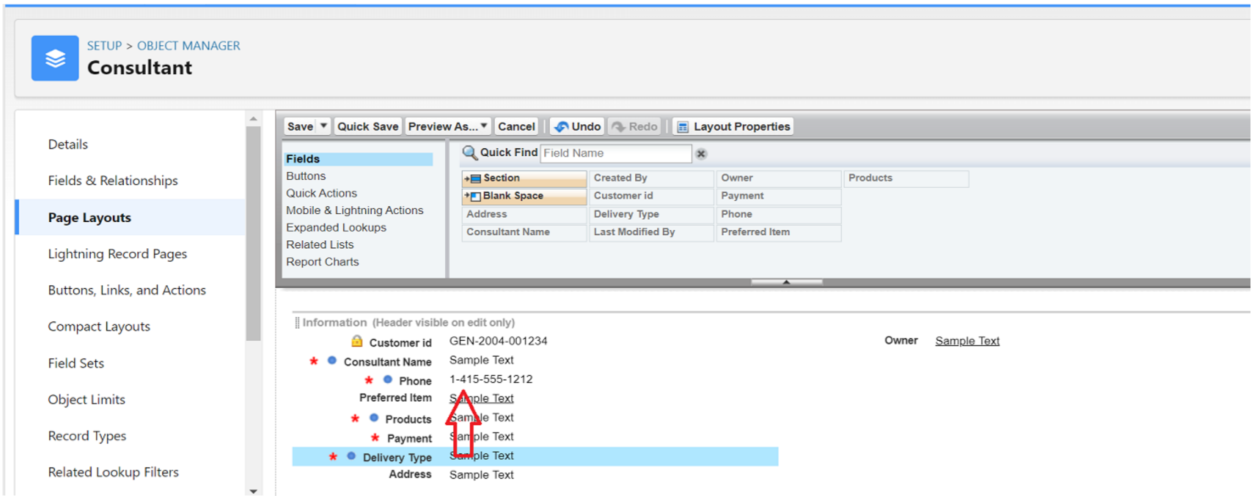
In Salesforce, page layouts define the organization and arrangement of fields, buttons, related lists, and other components on an object's detail and edit pages. They allow you to control the user interface and tailor it to meet the specific needs of your organization.

Page Layout Creation

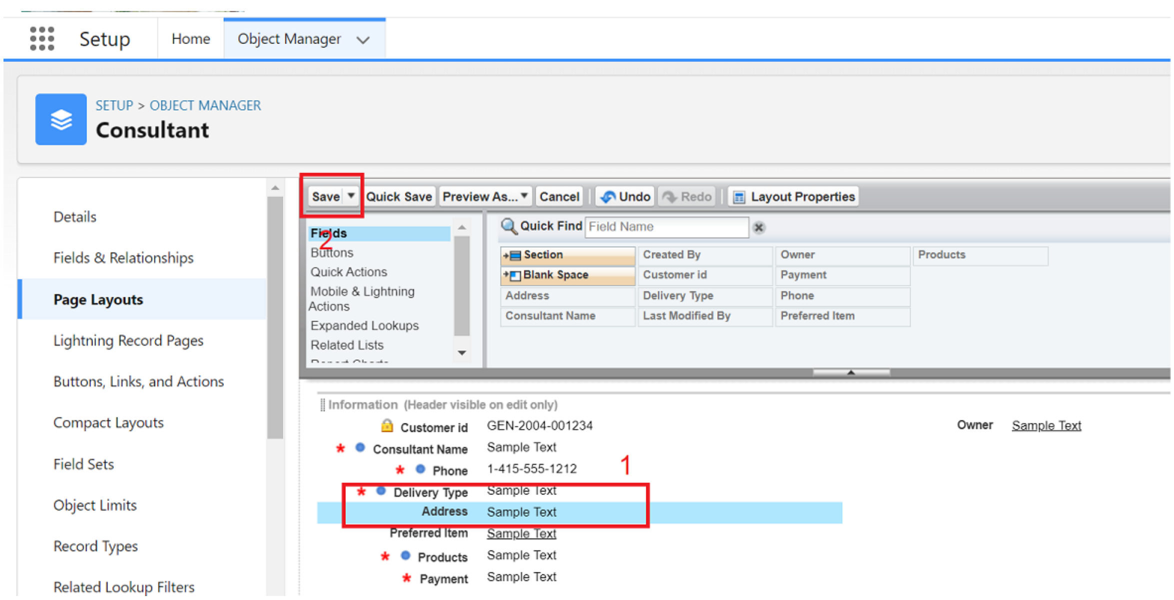
1. From the Salesforce setup menu, go to "Object Manager" and select the Consultants object.
2. Click on "Page Layouts" in the left sidebar. This will display a list of available page layouts for the selected object.
3. Select the Consultant Layout page layout.



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



5. Click on Save.



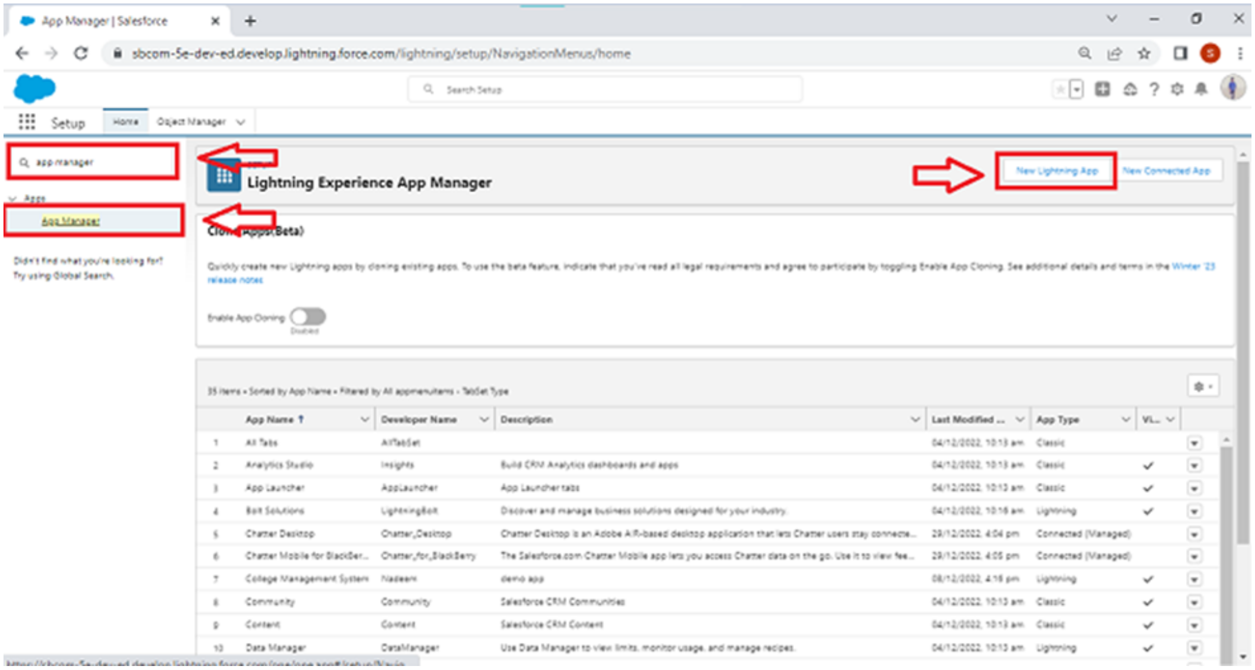
5.The Lightning App

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

5.1.Create a Lightning App

To create a Lightning app page:

1. Go to the Setup page.
2. In the Quick Find search bar, type “App Manager” and select “App Manager.”
3. Click on New Lightning App.
    - Fill the app name as **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.**

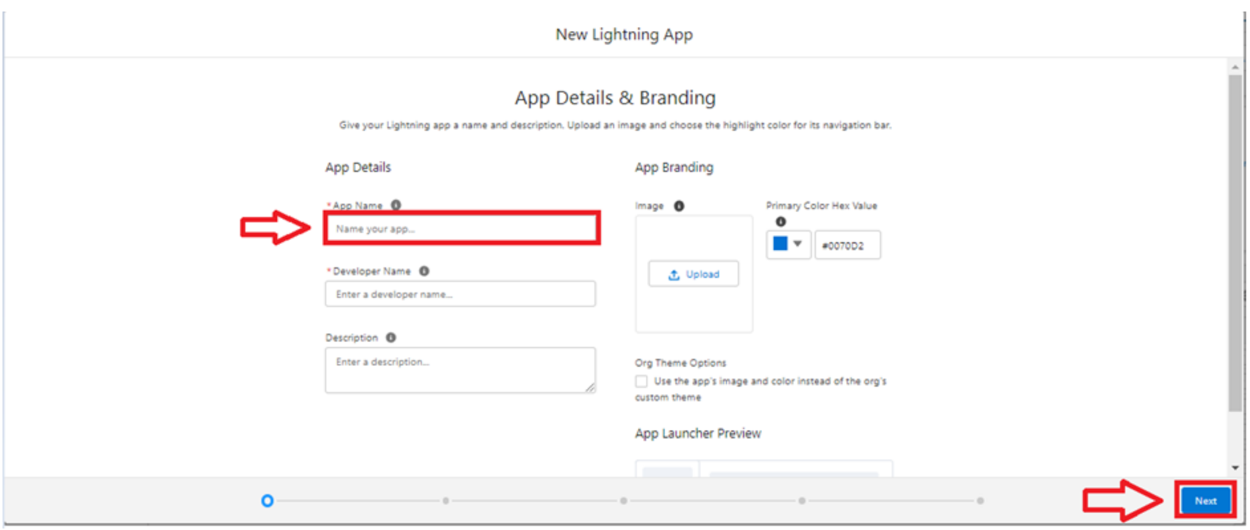


To Add Navigation Items:

1. Select the items (Our Customers, Consultants, Retailers, Others, Reports, Dashboards)

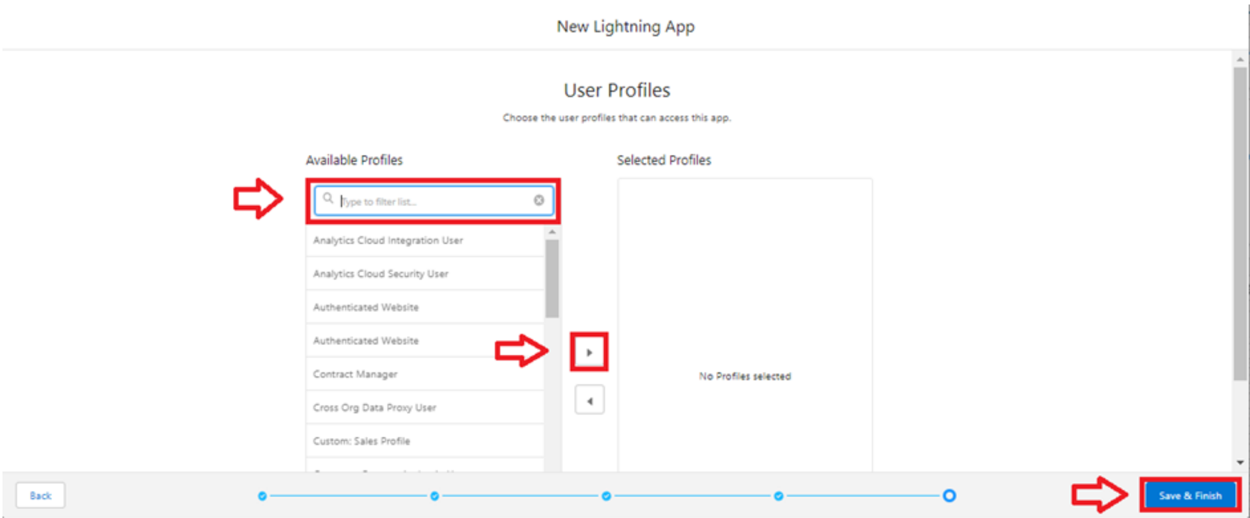
from the search bar and move them using the arrow button.

2. Click **Next.**



To Add User Profiles:

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



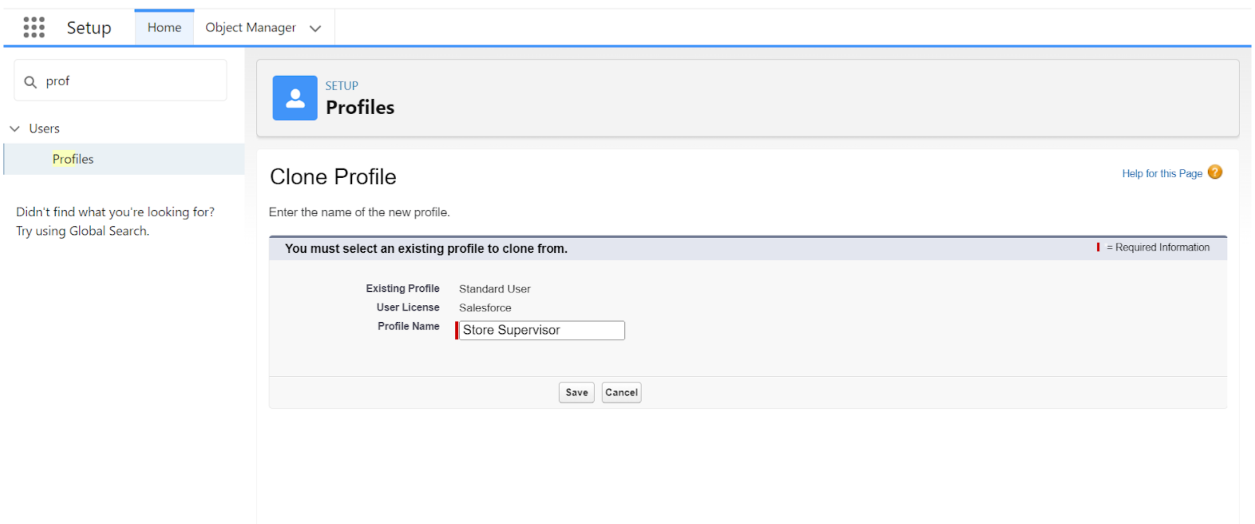
6.Profile

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

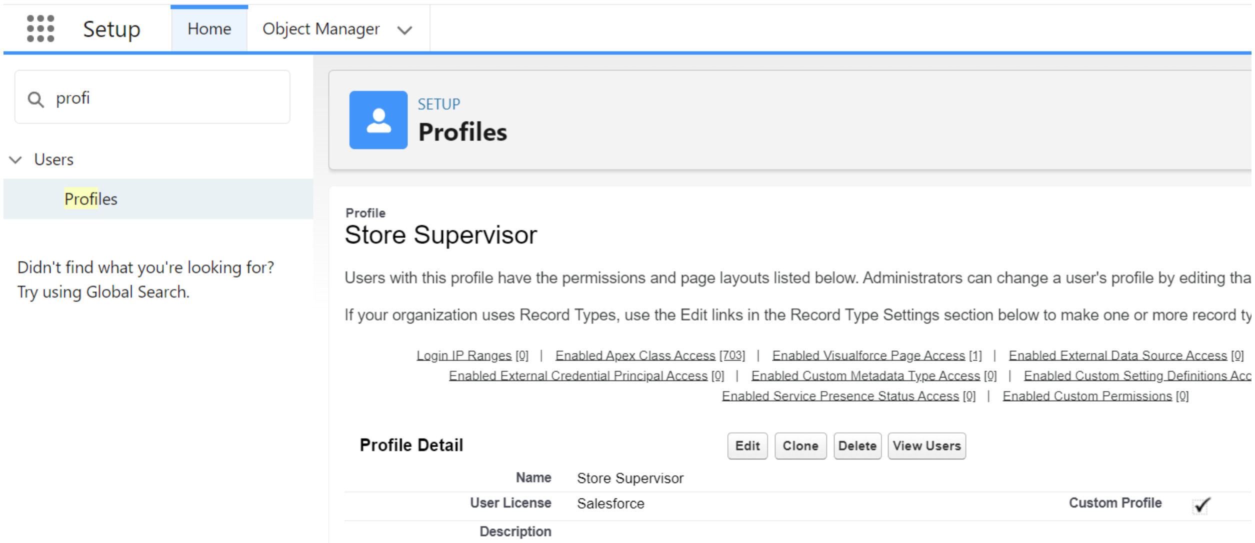
6.1.**Creating a Profile**

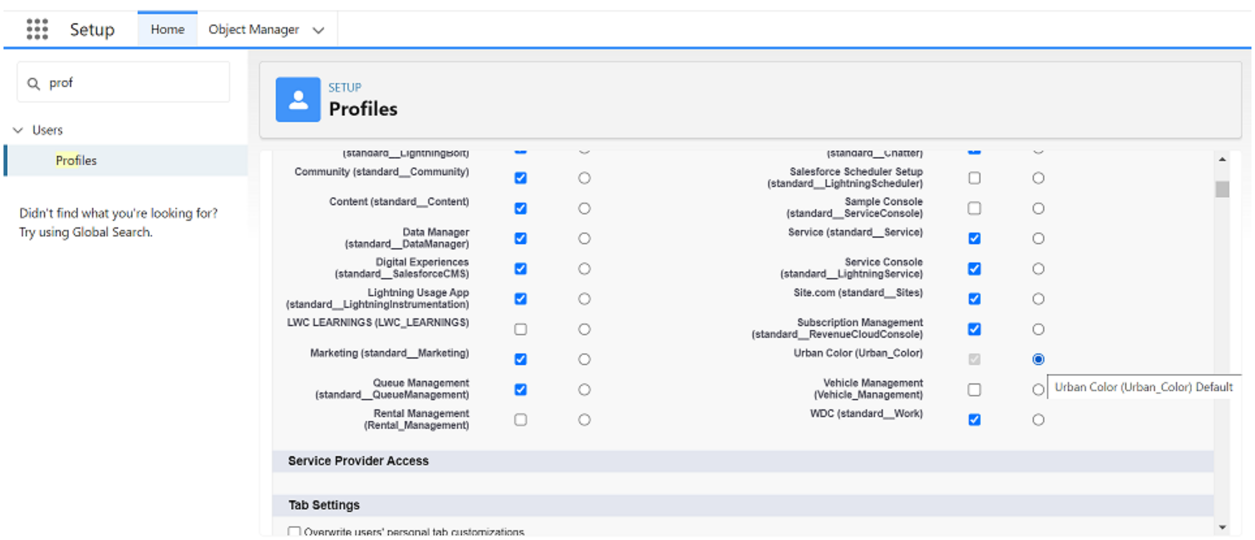
Creating a Store Supervisor Profile and Setting Object Permissions:

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



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





8. Scroll down to Custom App Settings and give access to Urban Color.

9. Click on Save.

To Create a New Profile:

1. Go to Setup.

2. Type Profiles in the Quick Find box.

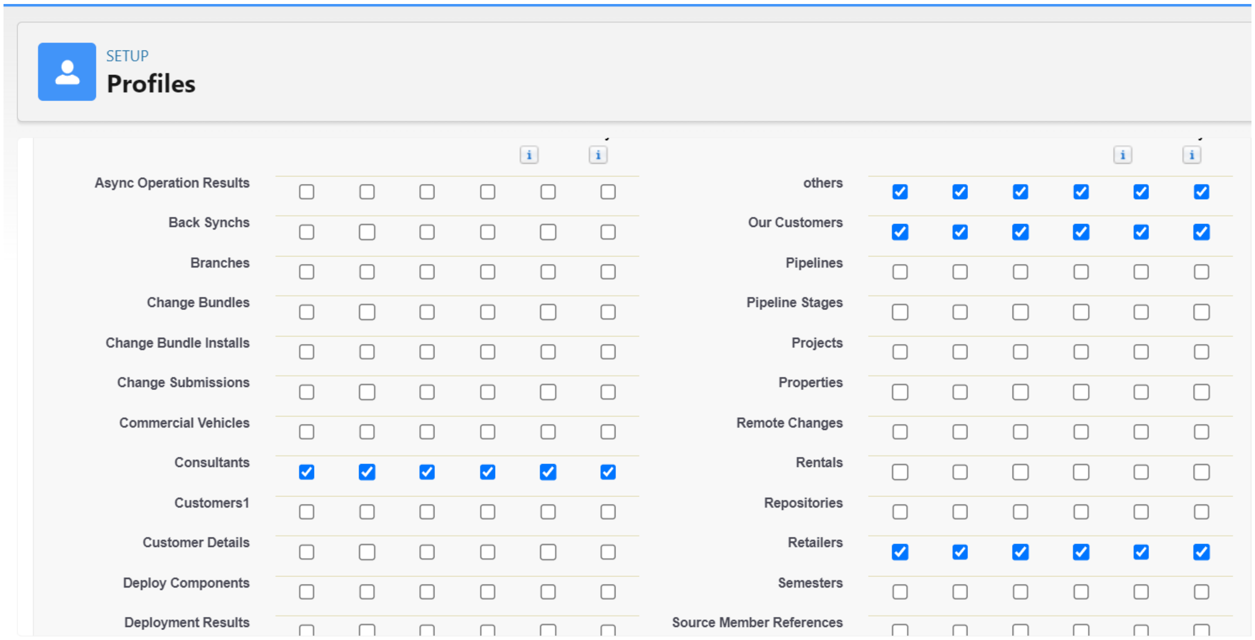
3. Click on Profiles.

4. Clone the desired profile (Standard User is preferable).

5. Enter the Profile Name.

6. Click Save.

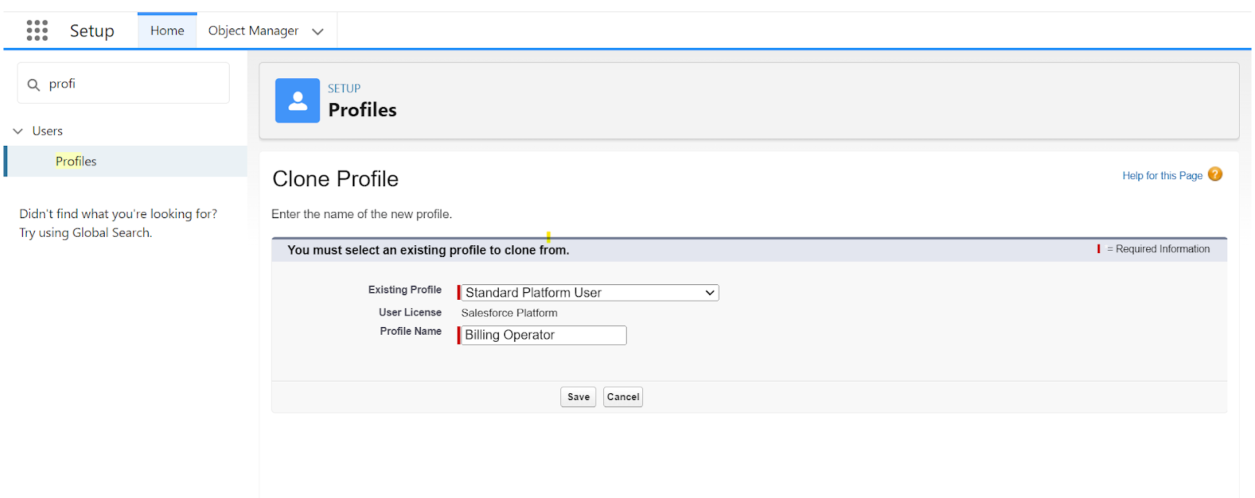
7. While still on the profile page, click Edit.

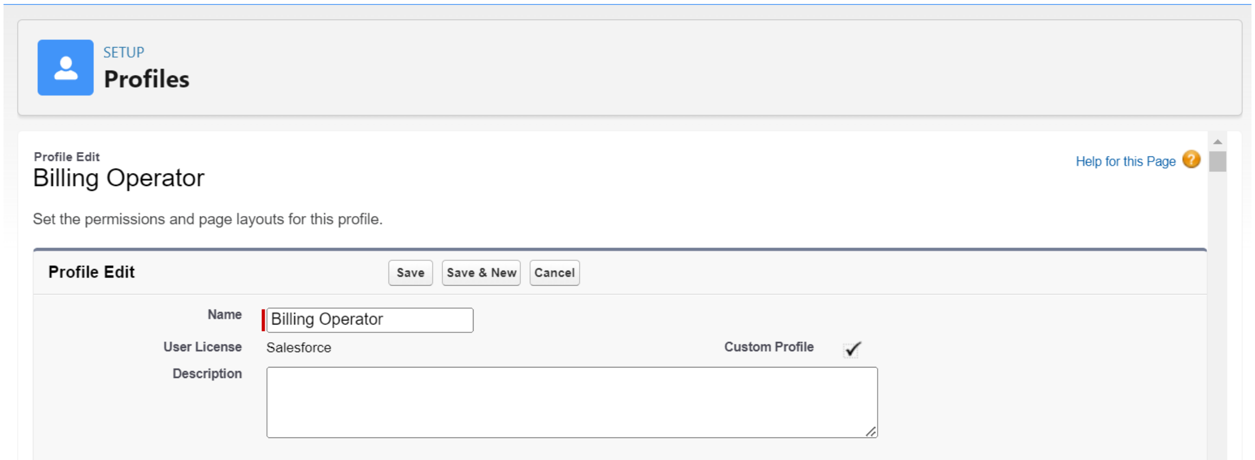


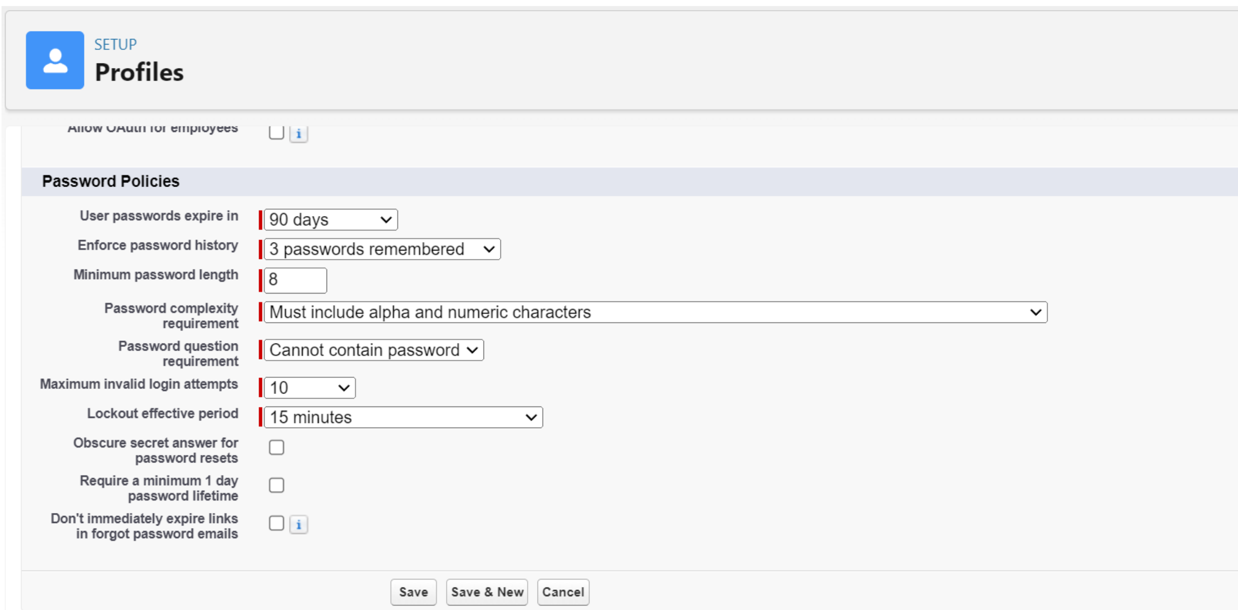
Similarly, Create an Operator Profile:

1. Clone the Salesforce Platform user profile.

2. Give access only for **Billing Operator.**







3. **Click on Save.**

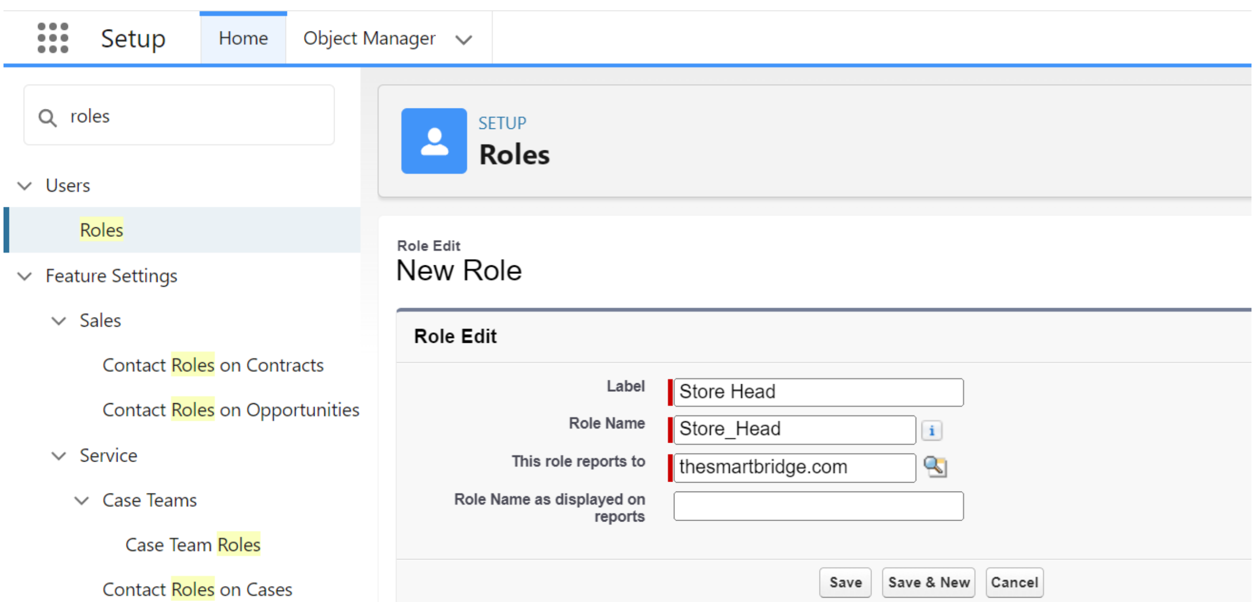
7.Setup Roles

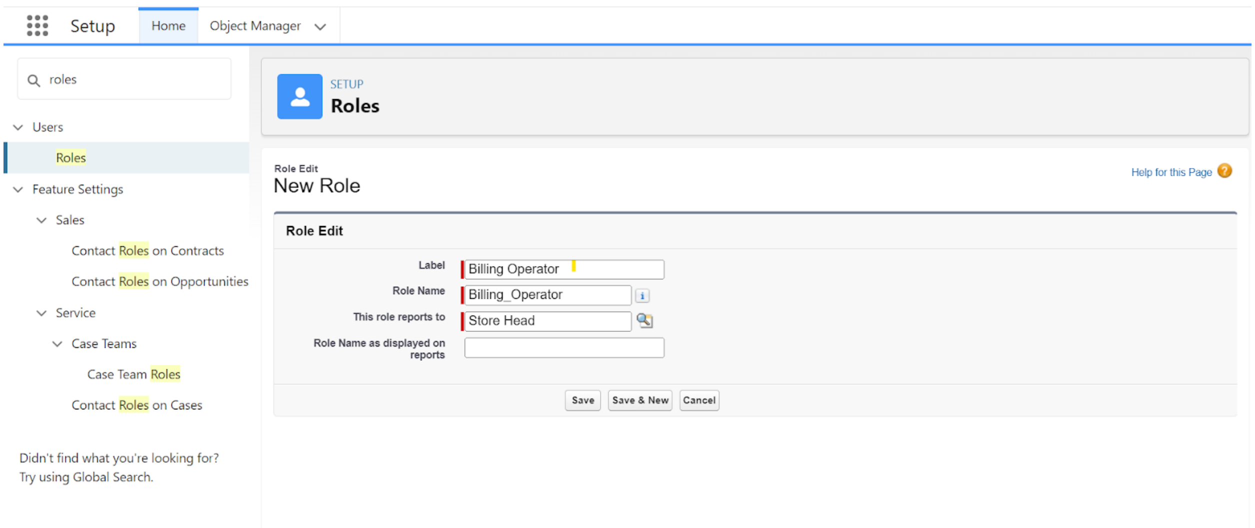
Roles are record-level access controls that define what data a user can see in Salesforce.

Setup Roles

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

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




Setup
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Contact Roles on Contracts
Contact Roles on Opportunities
Service
Case Teams
Case Team Roles
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Didn't find what you're looking for?
Try using Global Search.
SETUP
Roles
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New Role
Help for this Page
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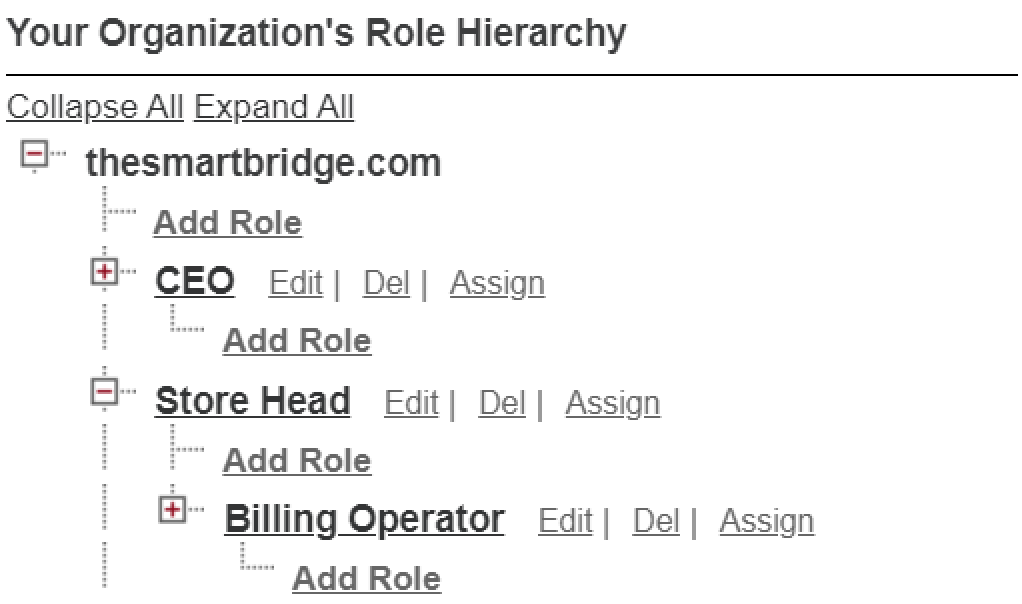
Your Organization's Role Hierarchy
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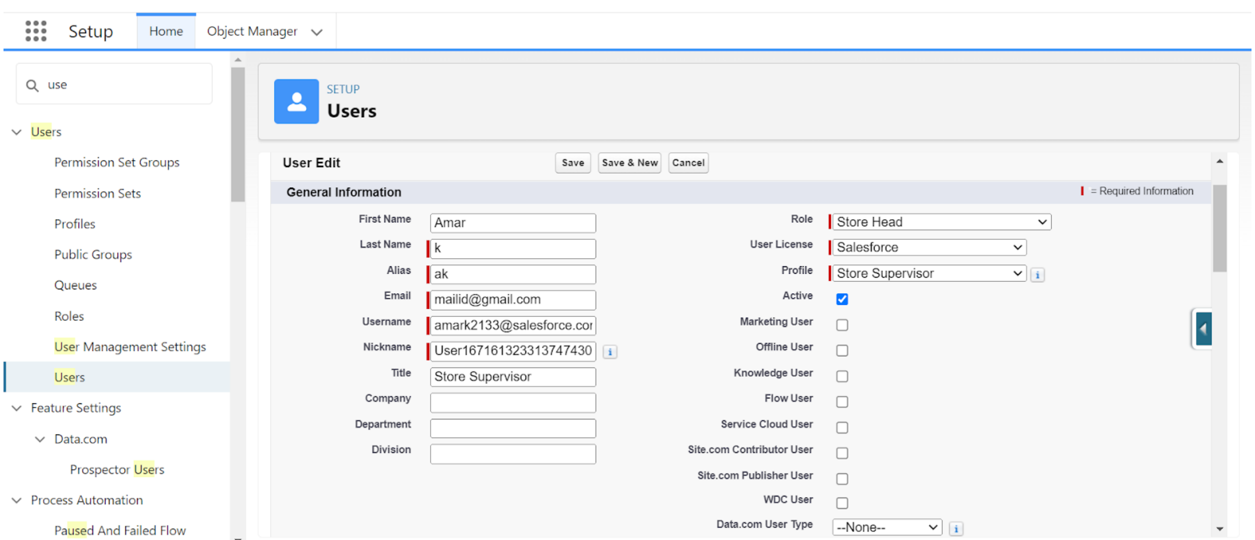
Add Role
CEO Edit | Del | Assign
Add Role
Store Head Edit | Del | Assign
Add Role
Billing Operator Edit | Del | Assign
Add Role

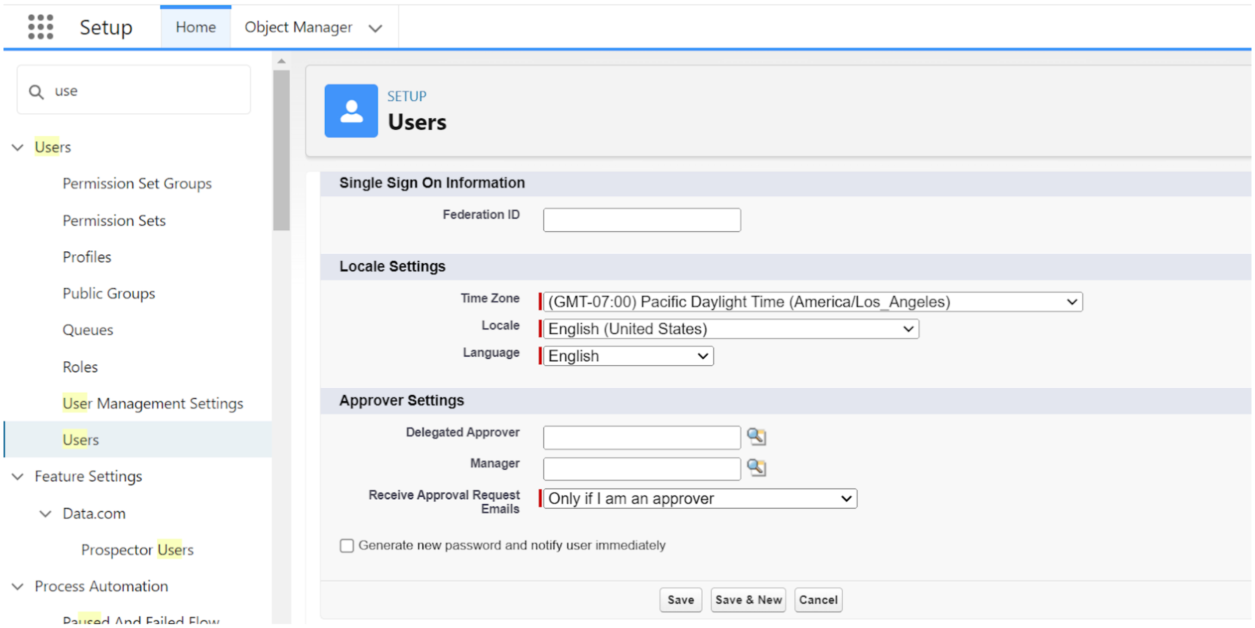
8.Users

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:

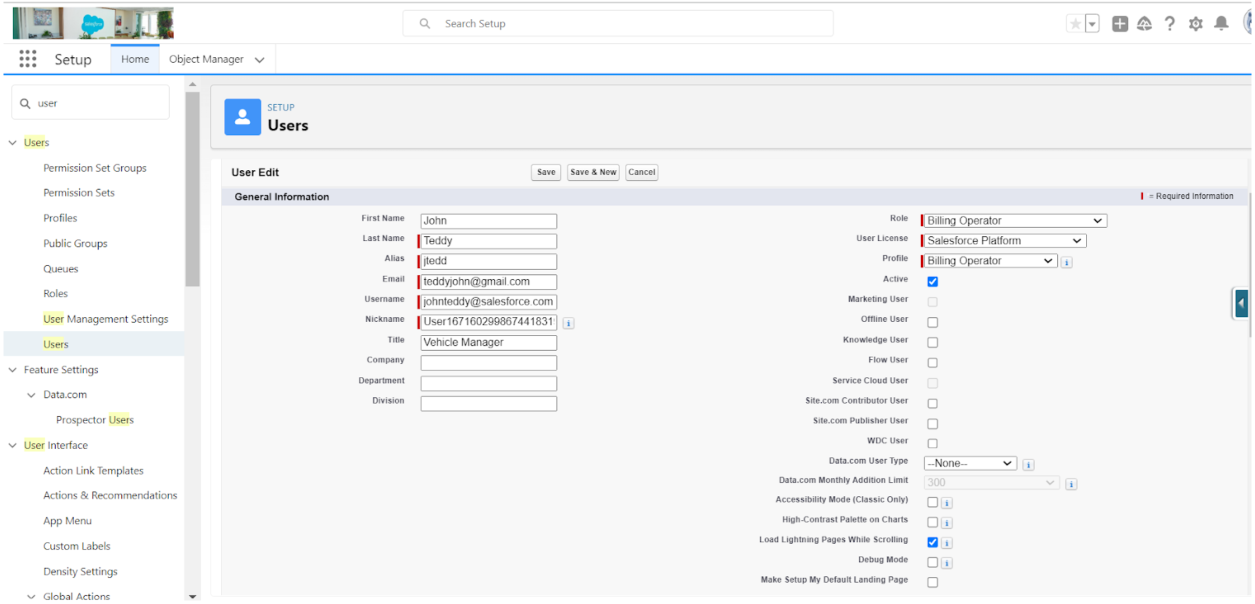
1. From **Setup**, in the **Quick Find box,** enter Users, and then select Users.
2. Click **New User.**
3. Enter the user's name as Amar K and your email address, and create a unique username in the form of an email address. By default, the username is the same as the email address.
4. **Select a Role** 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.**





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.**


Search Setup
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Feature Settings
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Prospector Users
User Interface
Action Link Templates
Actions & Recommendations
App Menu
Custom Labels
Density Settings
Global Actions
SETUP
Users
User Edit
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Cancel
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Last Name Teddy
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Username johnteddy@salesforce.com
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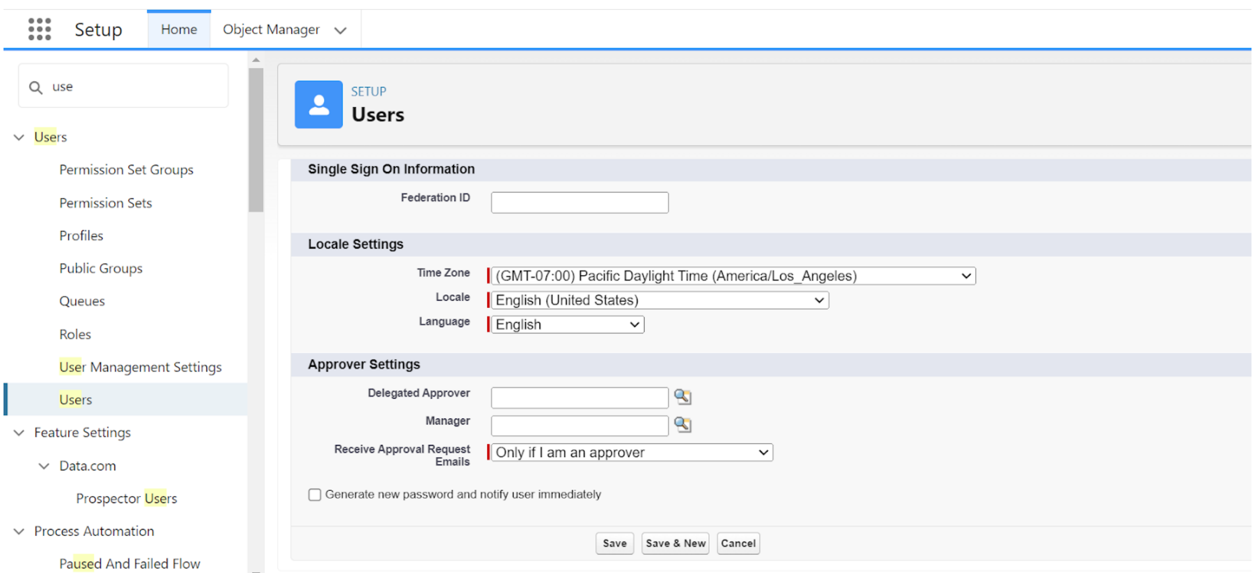
Title Vehicle Manager
Company
Department
Division
Role Billing Operator
User License Salesforce Platform
Profile Billing Operator
Active
Marketing User
Offline User
Knowledge User
Flow User
Service Cloud User
Site.com Contributor User
Site.com Publisher User
WDC User
Data.com User Type --None--
Data.com 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


Setup
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Profiles
Public Groups
Queues
Roles
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Users
Feature Settings
Data.com
Prospector Users
Process Automation
Paused And Failed Flow
SETUP
Users
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
Save
Save & New
Cancel

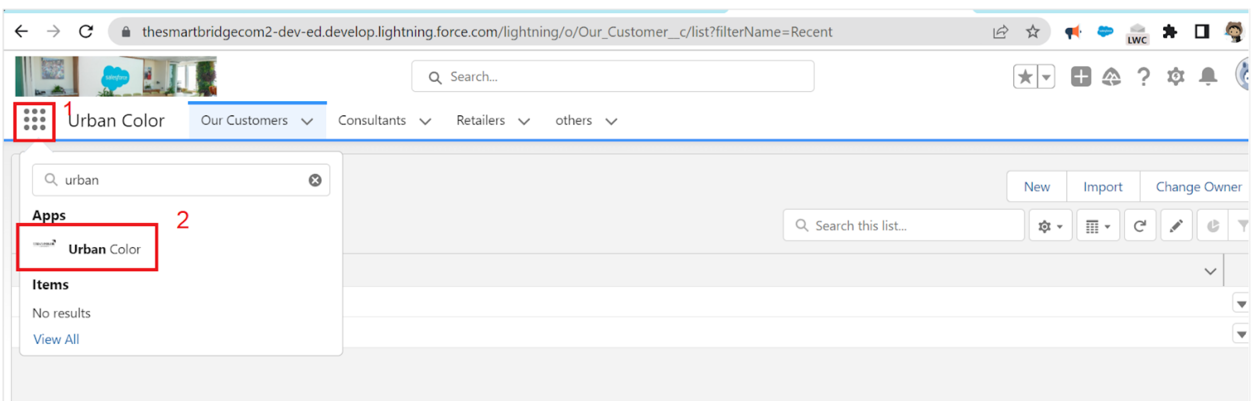
9.User Adoption

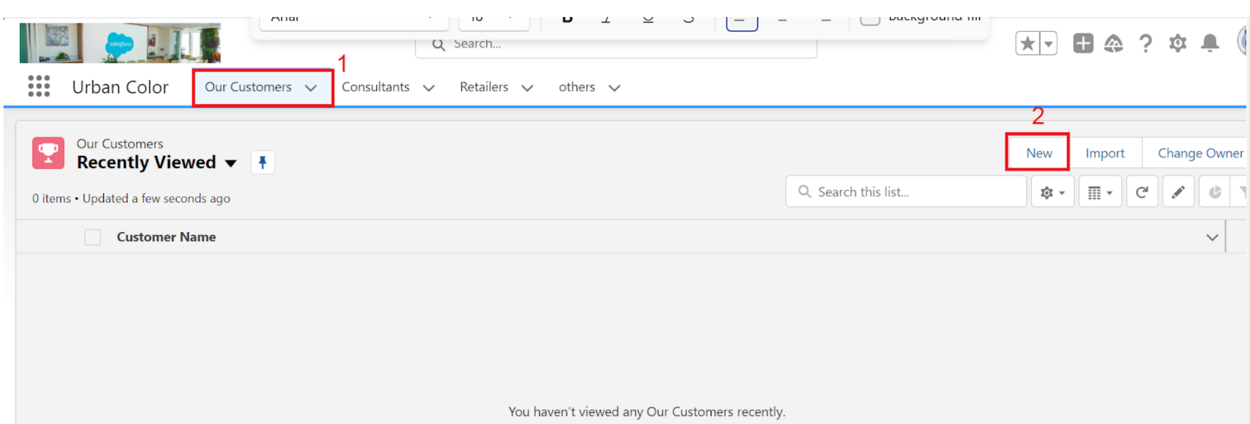
We need to understand user adoption and navigation. How to interact with database and their records.

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:

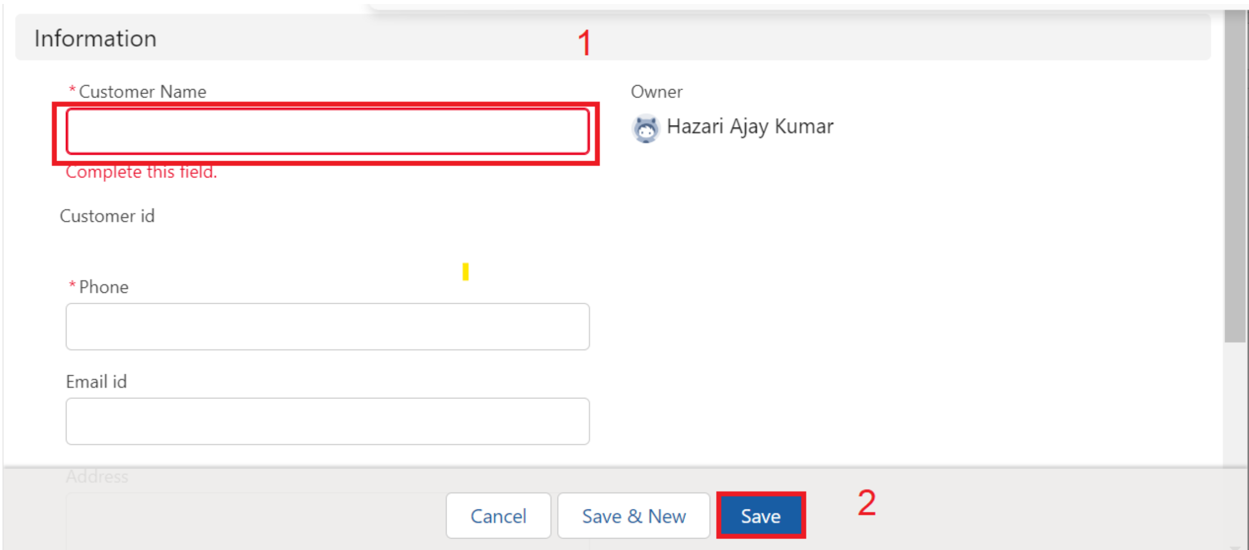
1. Click on the **App Launcher** on the left side of the screen.
2. Search for **Urban Color** and click on it.
3. **Click on the Our Customer tab.**
4. **Click** the New button.
5. Fill in all the **Our Customer record** details.
6. Click on the **Save button.**

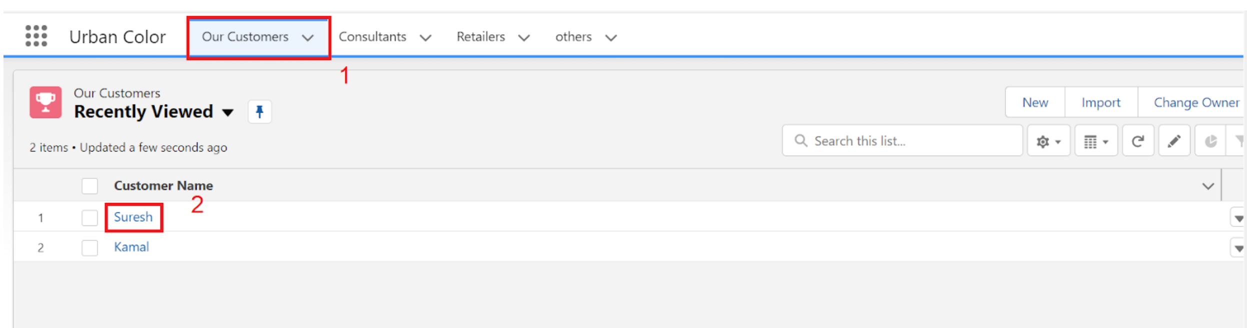


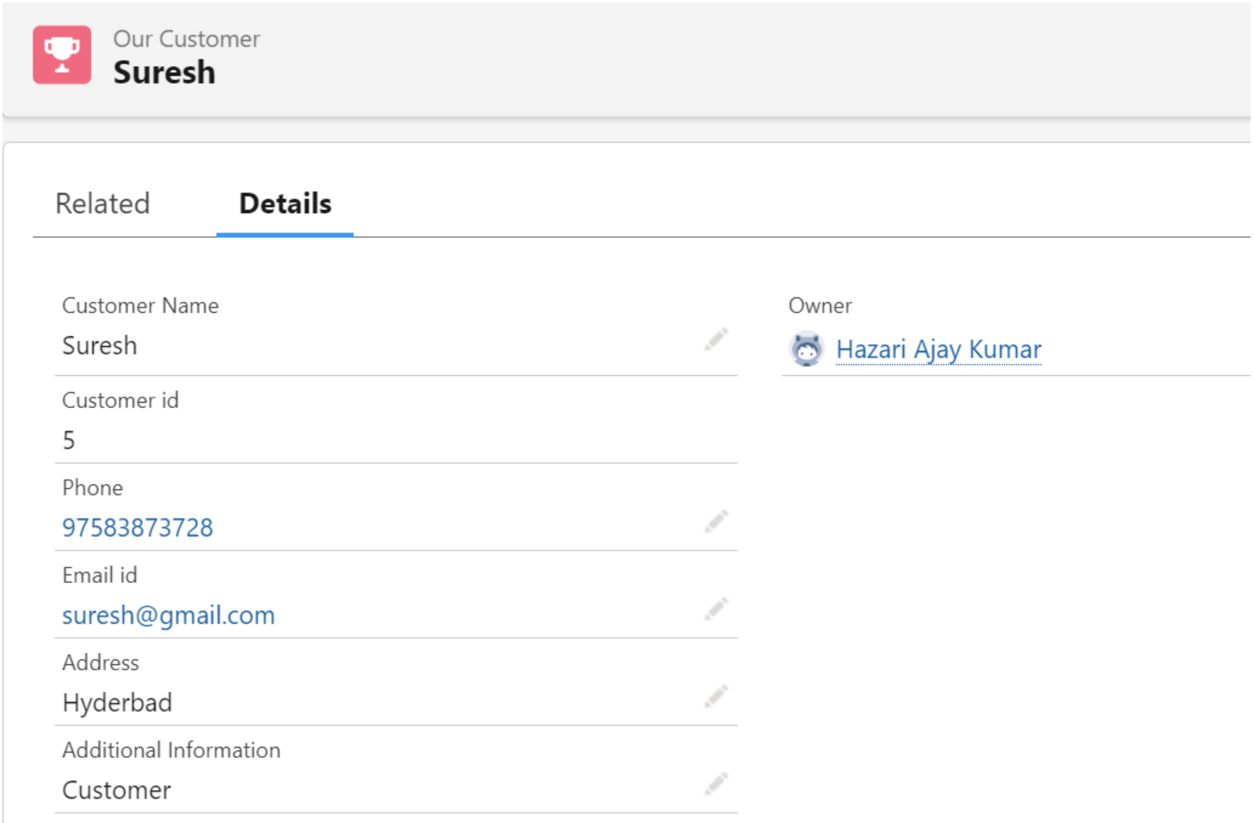


View Record (Our Customer)

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.**

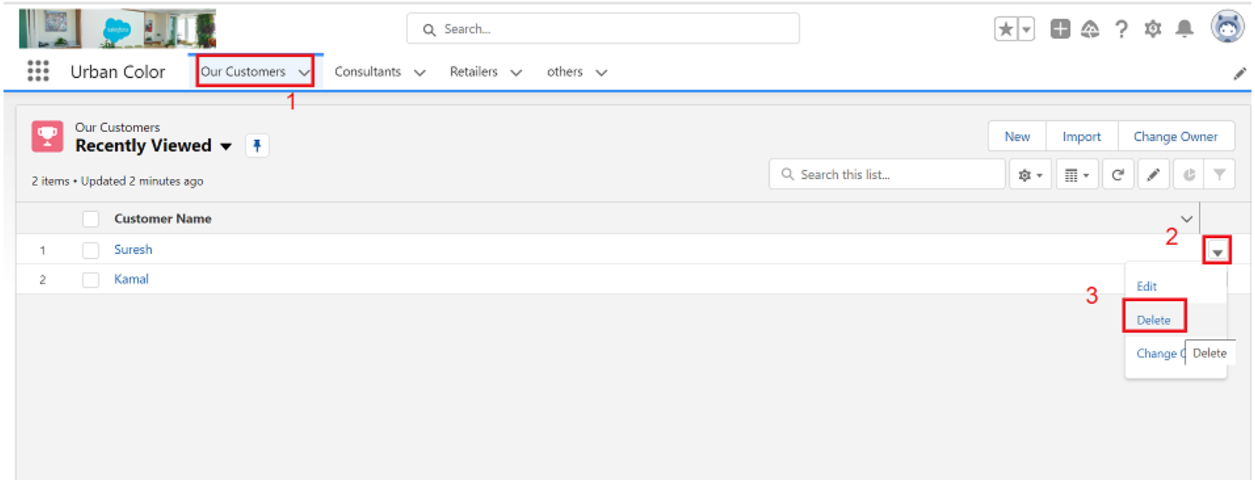




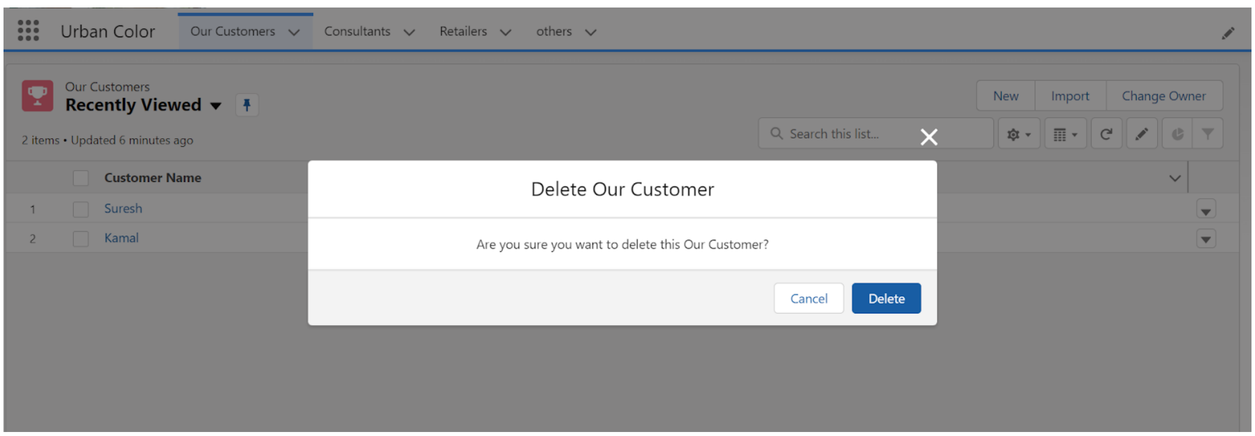


Delete Record (Our Customer)

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.



Search...
Urban Color
Our Customers
1
Consultants
Retailers
others
Our Customers
Recently Viewed
2 items • Updated 2 minutes ago
New
Import
Change Owner
Search this list...
Customer Name
2
1 Suresh
2 Kamal
Edit
3
Delete
Change
Delete



Urban Color
Our Customers
Consultants
Retailers
others
Our Customers
Recently Viewed
2 items • Updated 6 minutes ago
New
Import
Change Owner
Search this list...
Customer Name
1 Suresh
2 Kamal
Delete Our Customer
Are you sure you want to delete this Our Customer?
Cancel
Delete

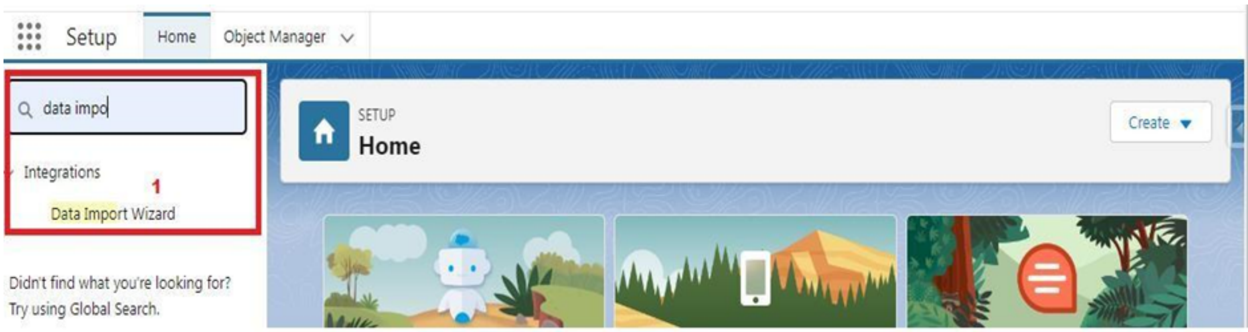
10. Import Data

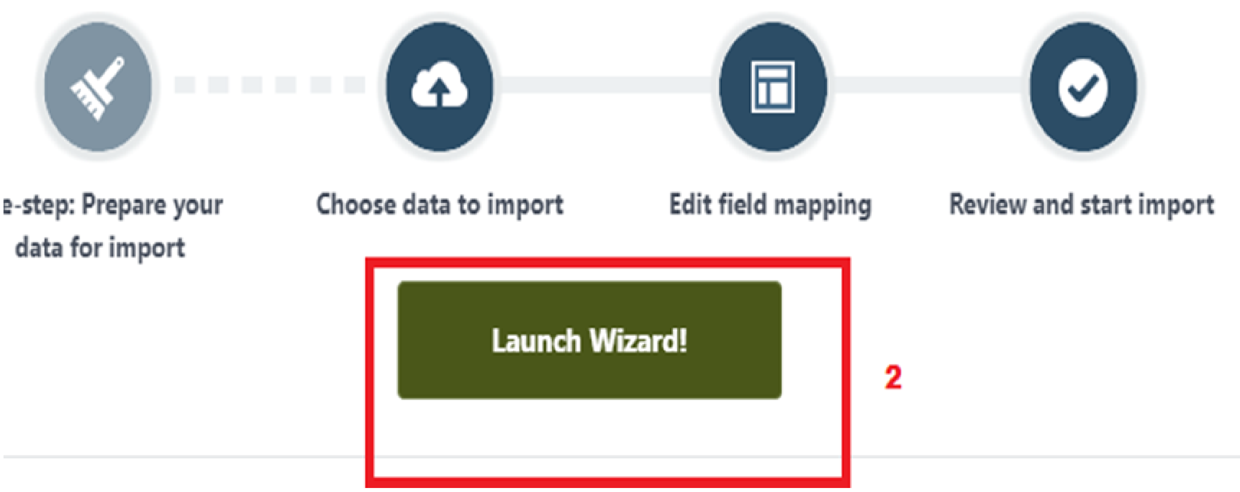
Data Import Wizard—This tool, accessible through the Setup menu, allows you to import data into common standard objects such as Contacts, Leads, Accounts, as well as data into custom objects.

To Import Data

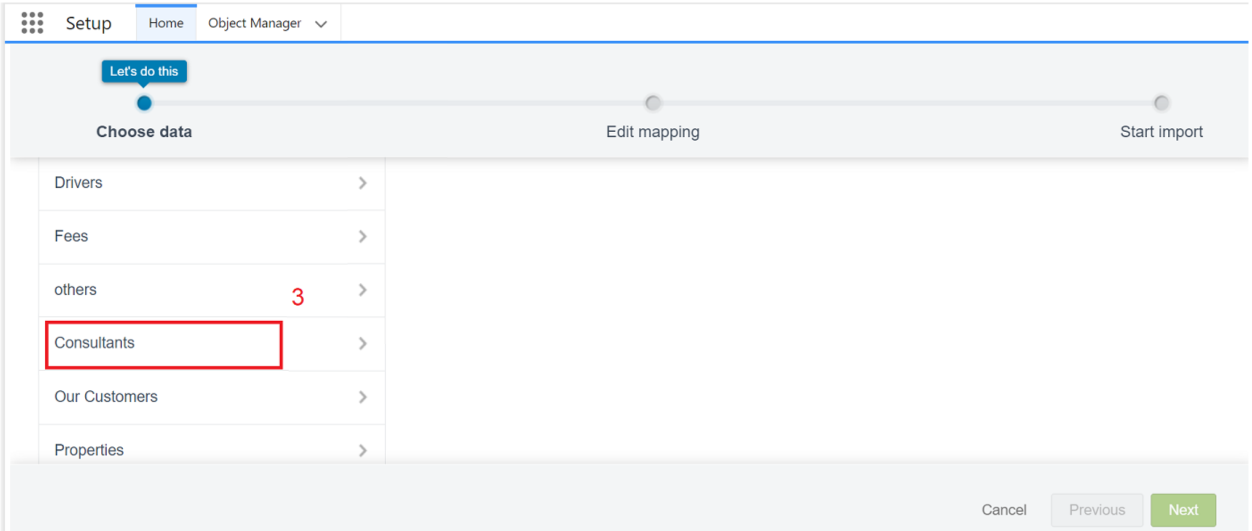
1. From **Setup,** click the **Home tab.**

2. In the **Quick Find box,** enter **Data Import** and select **Data Import Wizard.**

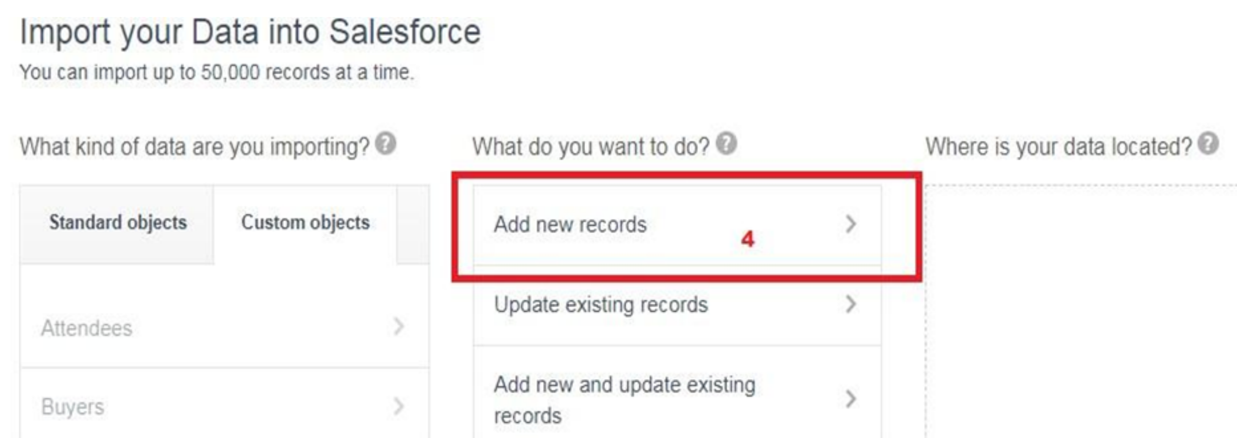




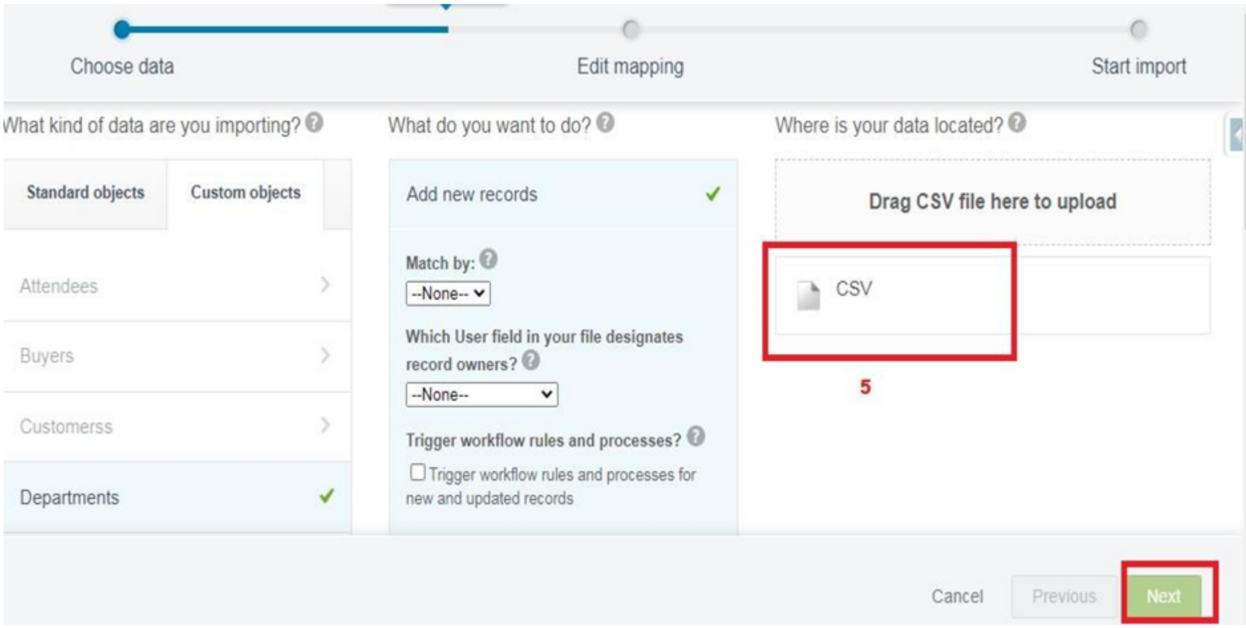
4. Click the **Custom Objects tab** and select the **Consultant object.**



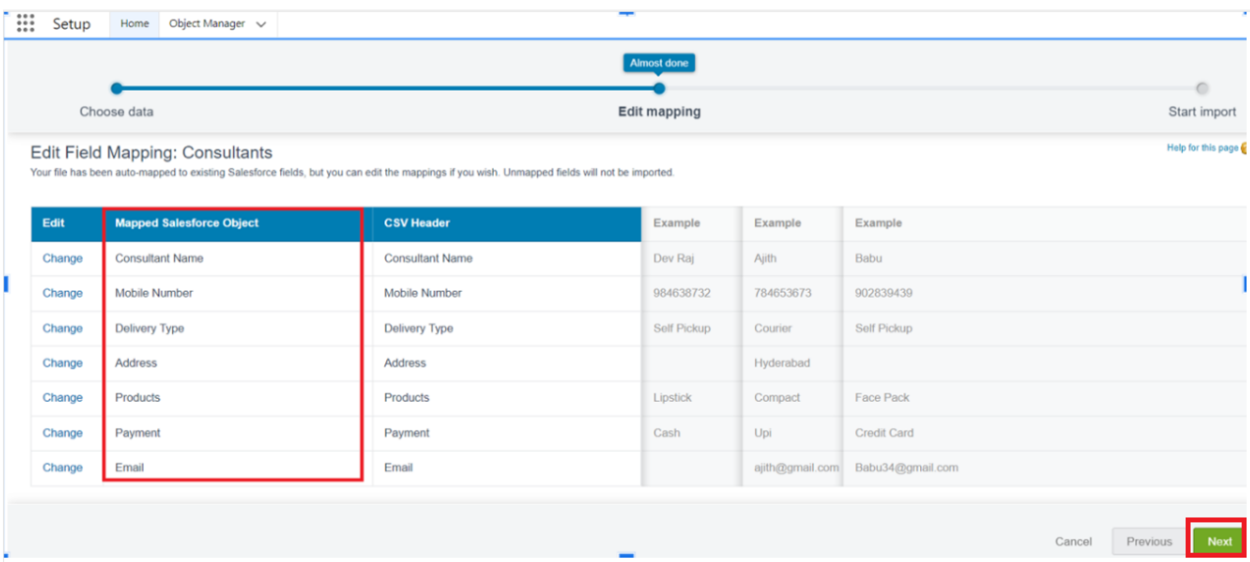
5. Select Add New Records.



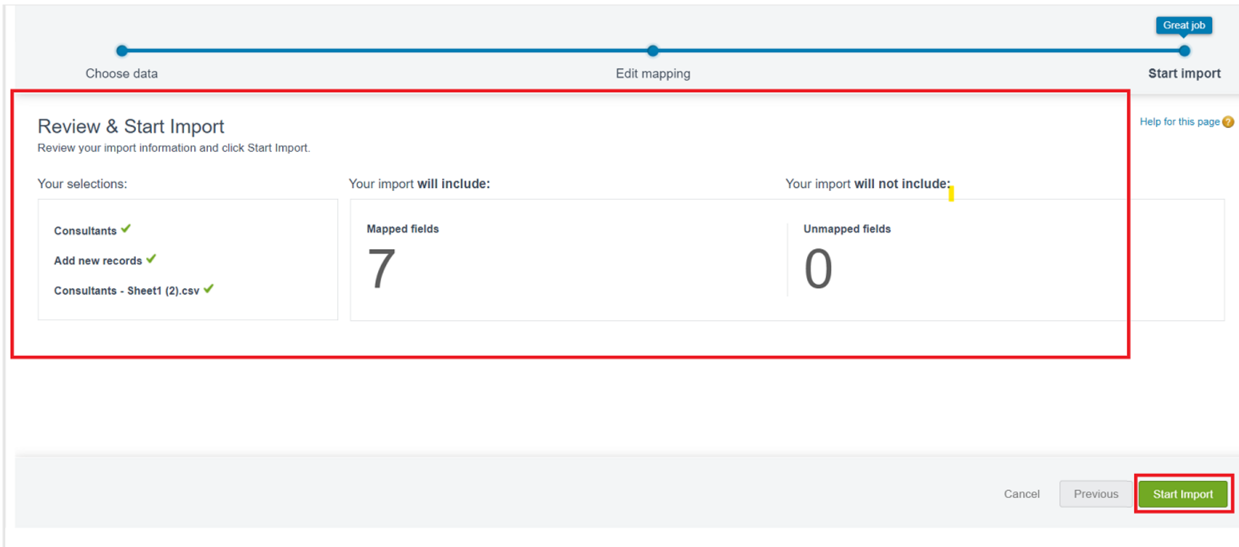
6. **Click CSV** and choose the **file Consultant_CSV** which was created earlier. **Click Next.**



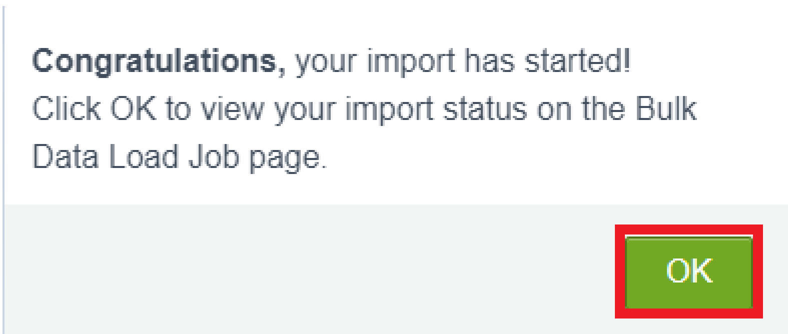
7. Since the field names in the CSV file (**CSV Header**) are the same as the field names in your object (**Mapped Salesforce Object**), the fields are automatically mapped. **Click Next.**



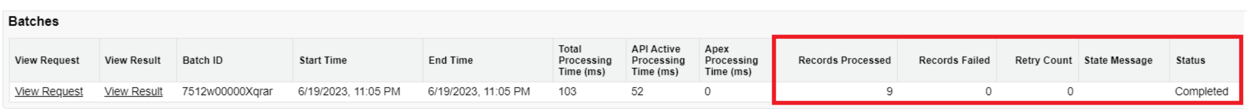
8. The next screen gives you a summary of your data import. **Click Start Import.**



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



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



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: 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.

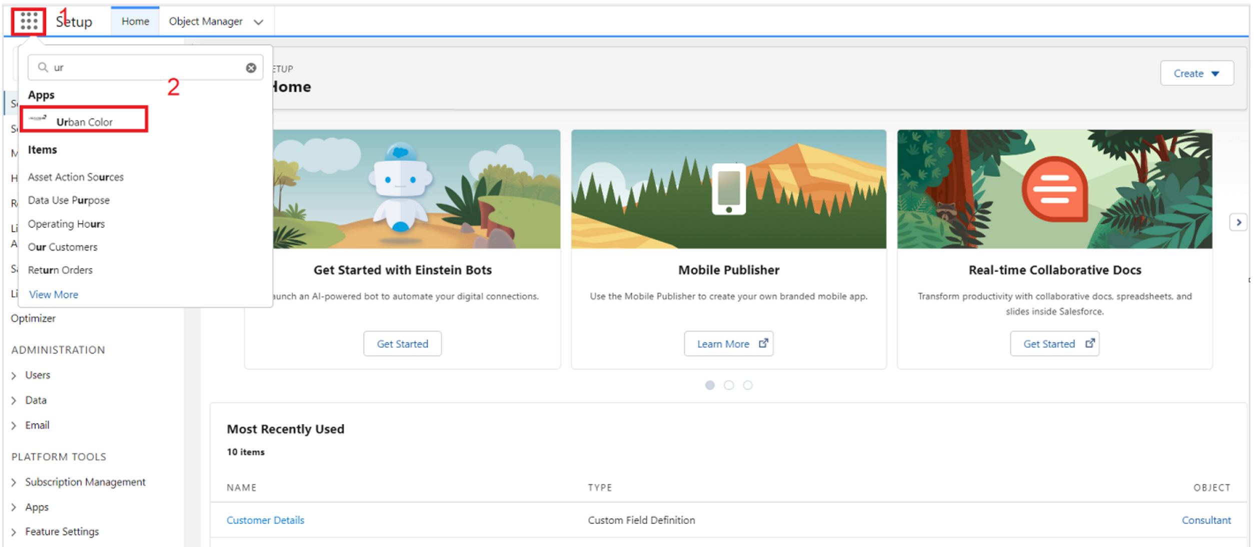
■ Managers can also delete the report.

11.1. Create Report

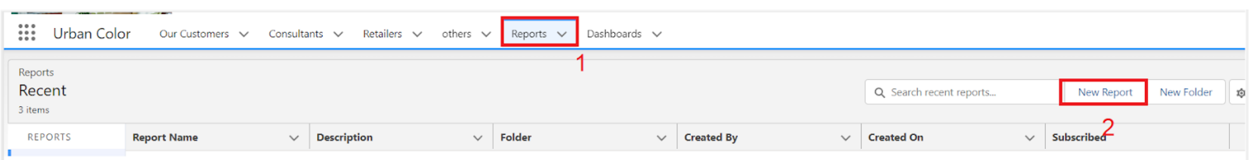
1. **Click** App Launcher.

2. Select **Urban Color App**.

3. **Click the Reports tab.**

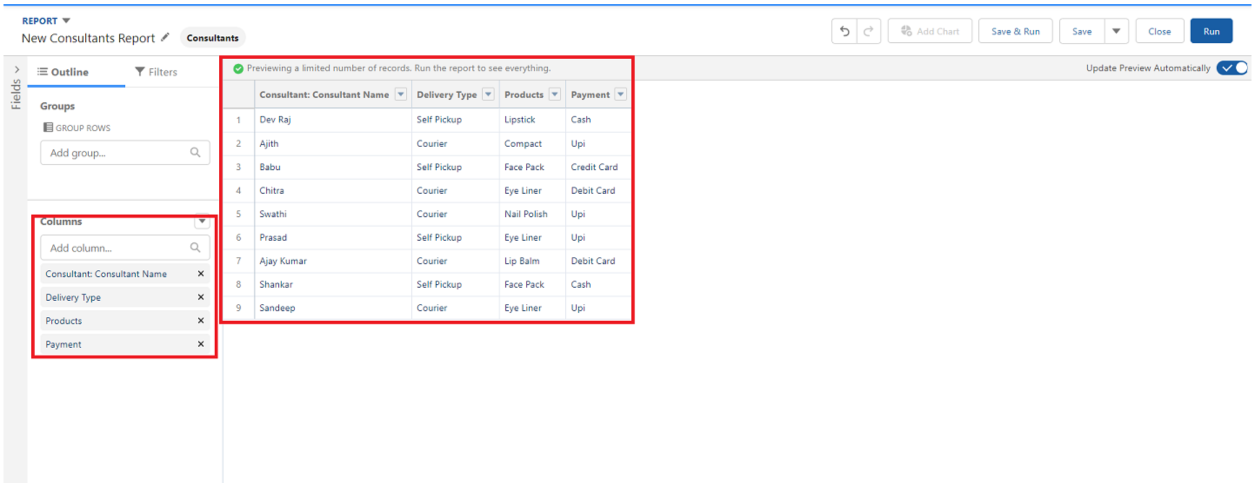


4. Click New Report.

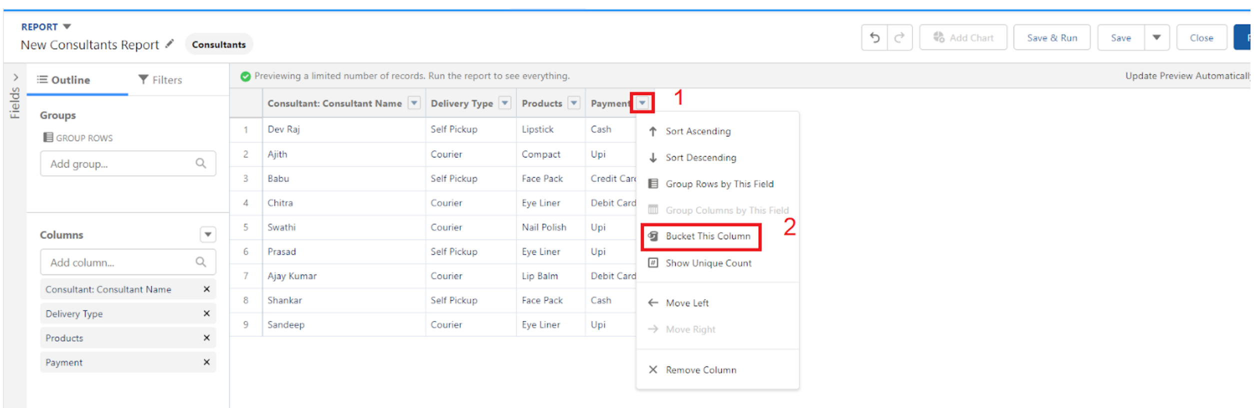


5. Select the report type as **Consultants and click Start Report.**

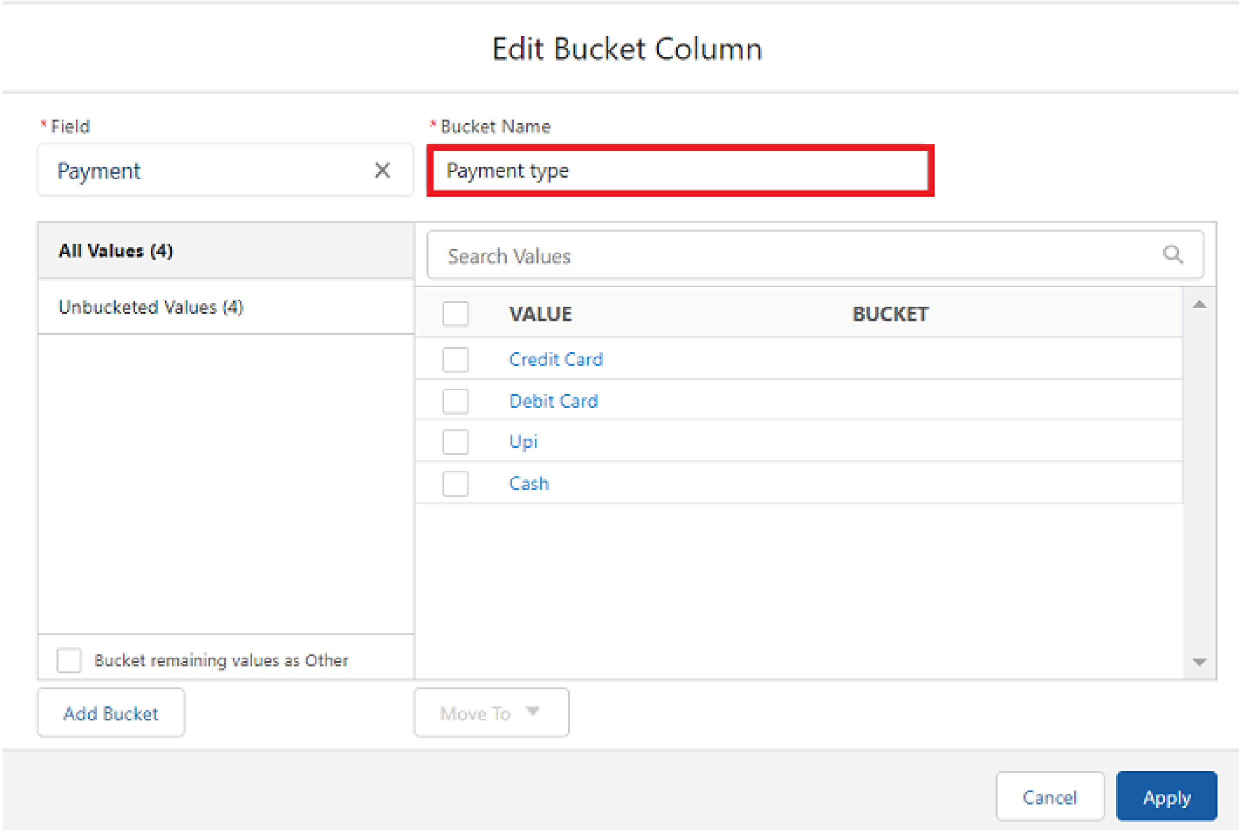
6. Customize your report by selecting the following columns: **Consultant Name, Delivery Type, Products, Payment.**



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

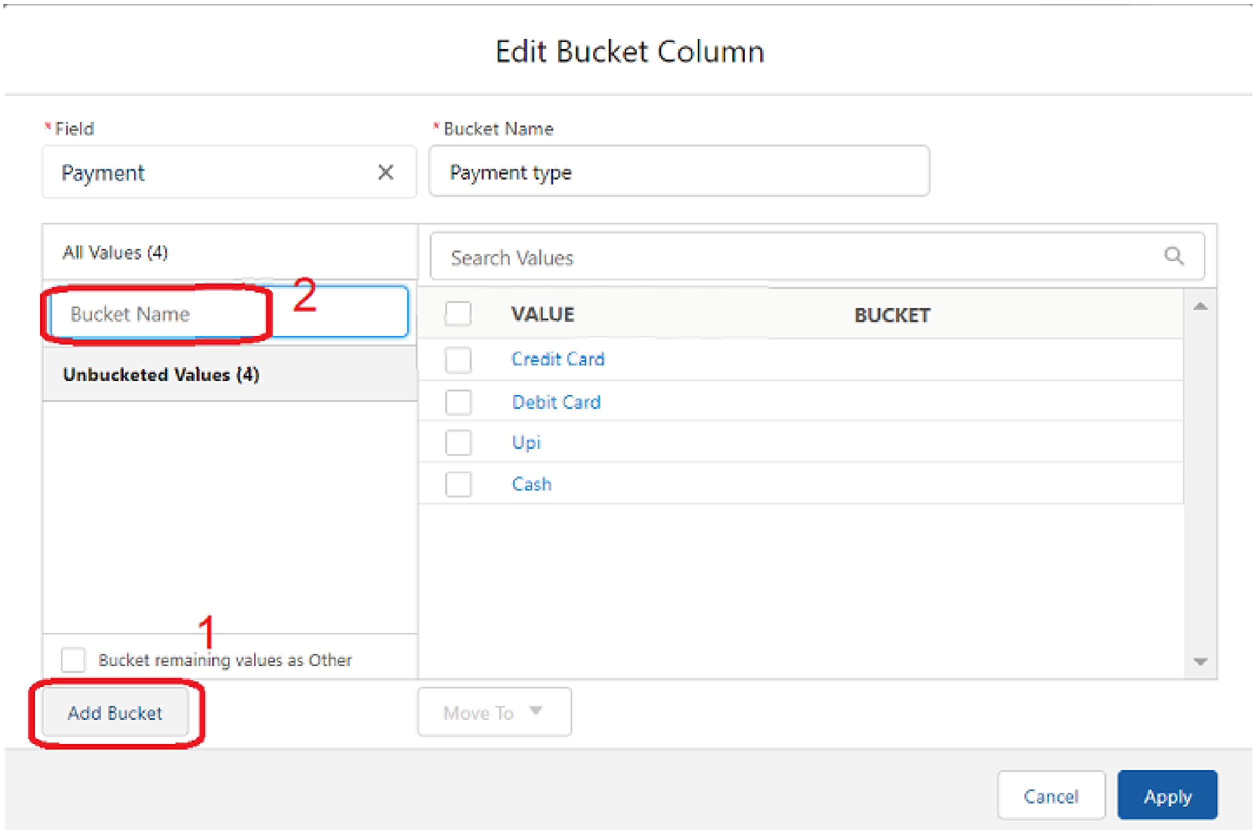


8. Name the bucket Payment Type.

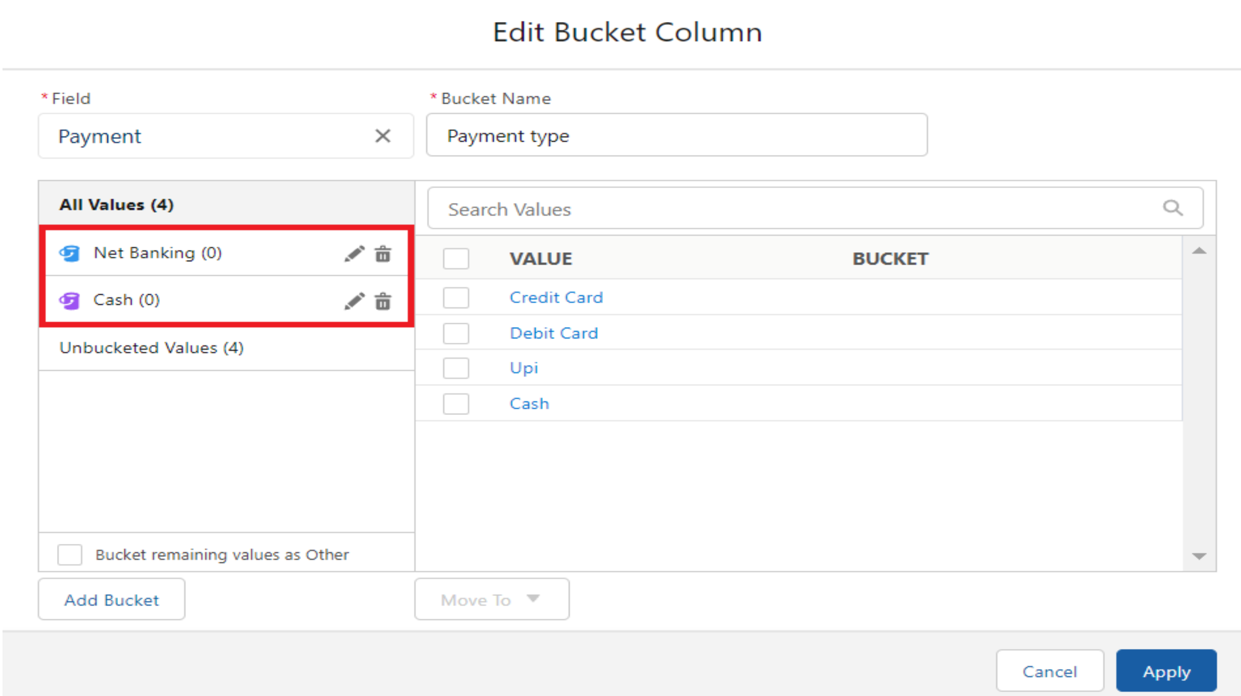


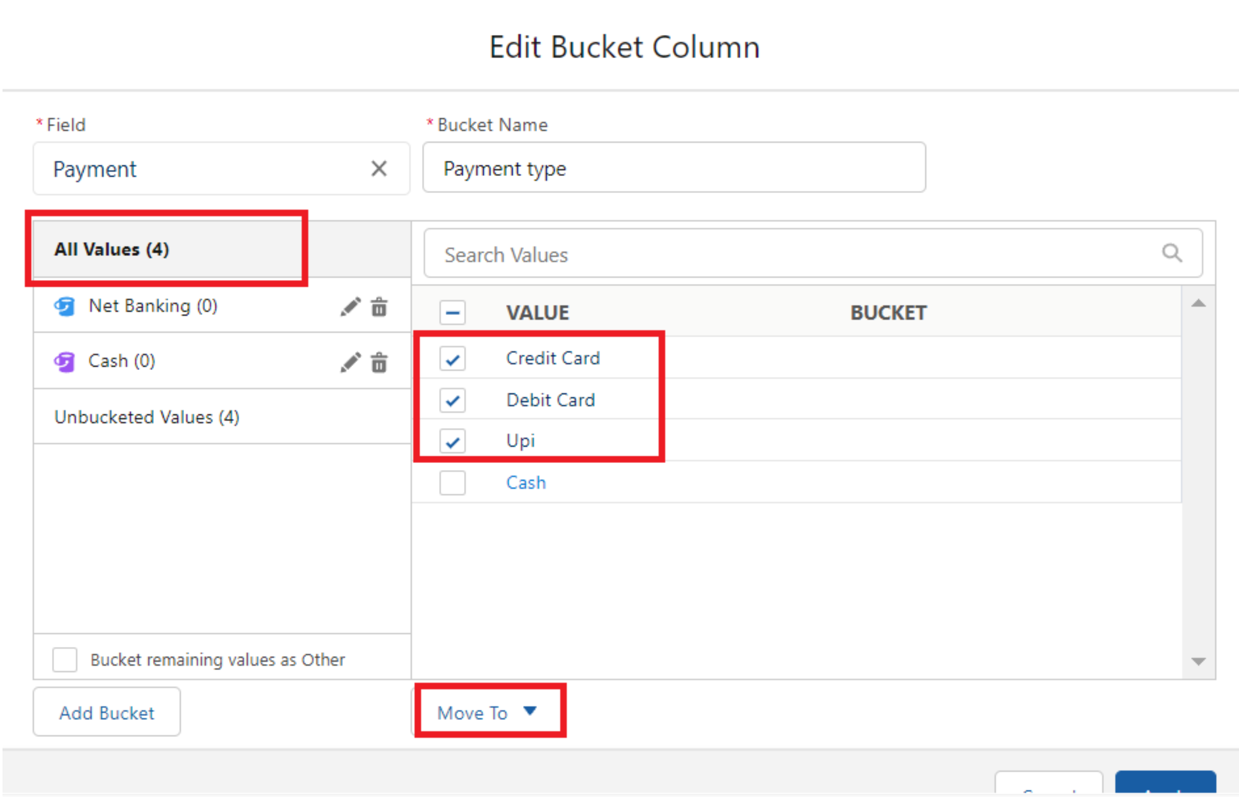
9. **Click Add Bucket** and name it **NetBanking.**

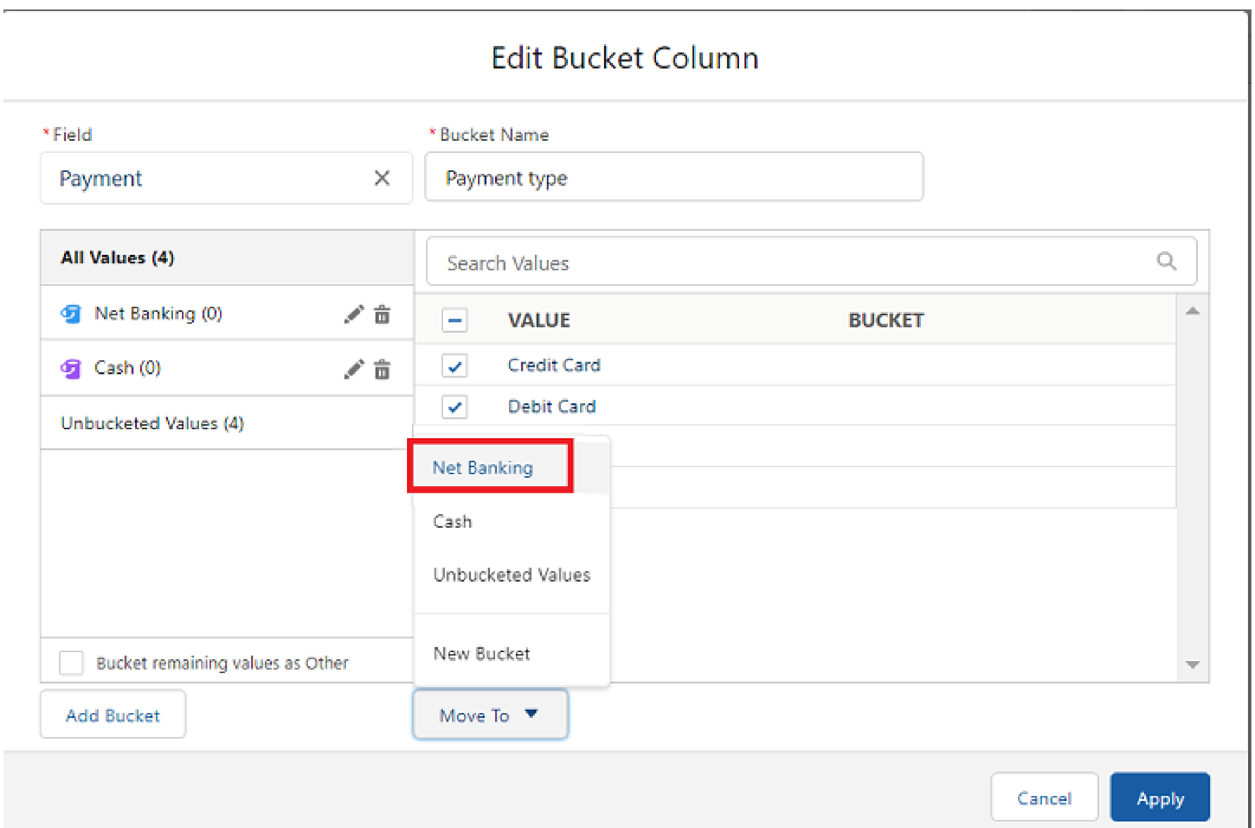
10.**Click Add Bucket** and name it **Cash.**



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



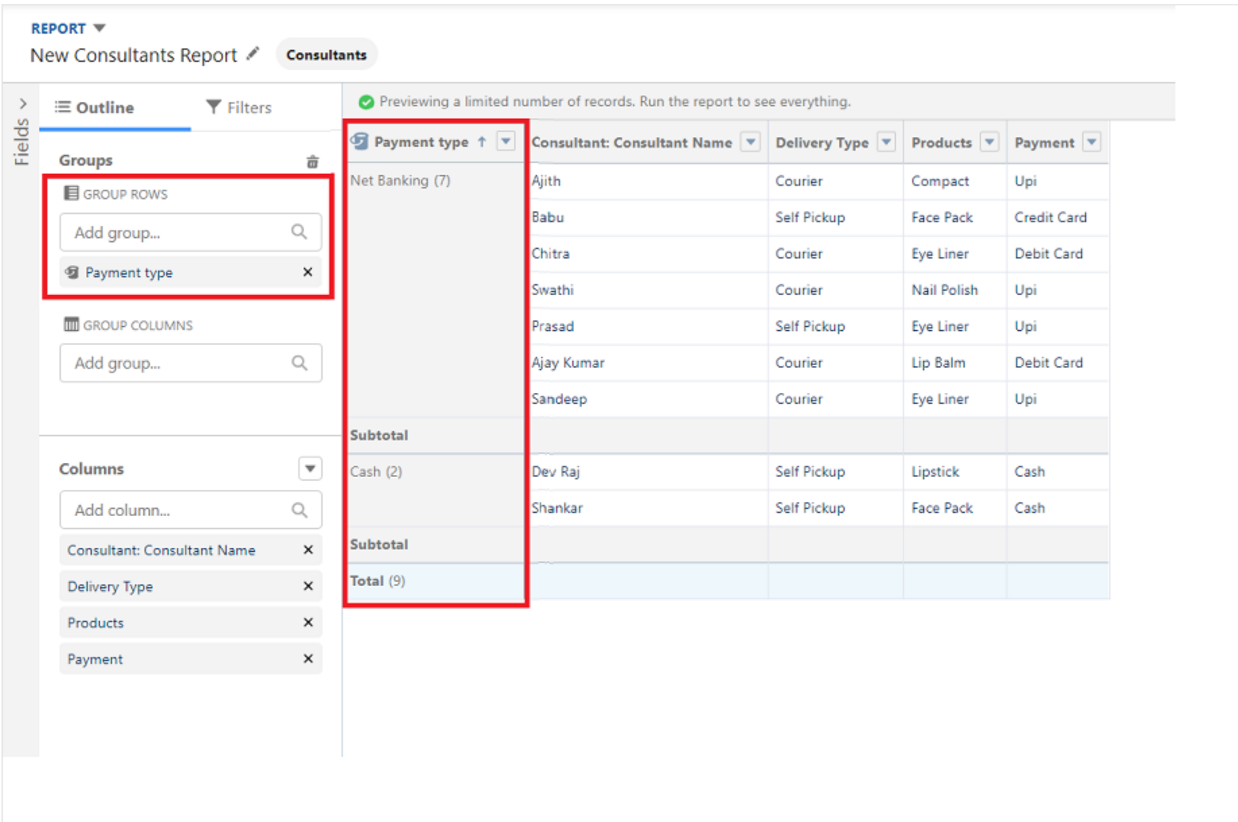

Edit Bucket Column
* Field
Payment
* Bucket Name
Payment type
All Values (4)
Net Banking (0)
Cash (0)
Unbucketed Values (4)
Bucket remaining values as Other
Add Bucket
Search Values
VALUE
BUCKET
Credit Card
Debit Card
Upi
Cash
Move To


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

12.Click on **All Values** again, select Cash, and move it to Cash.

13.**Click Apply.**

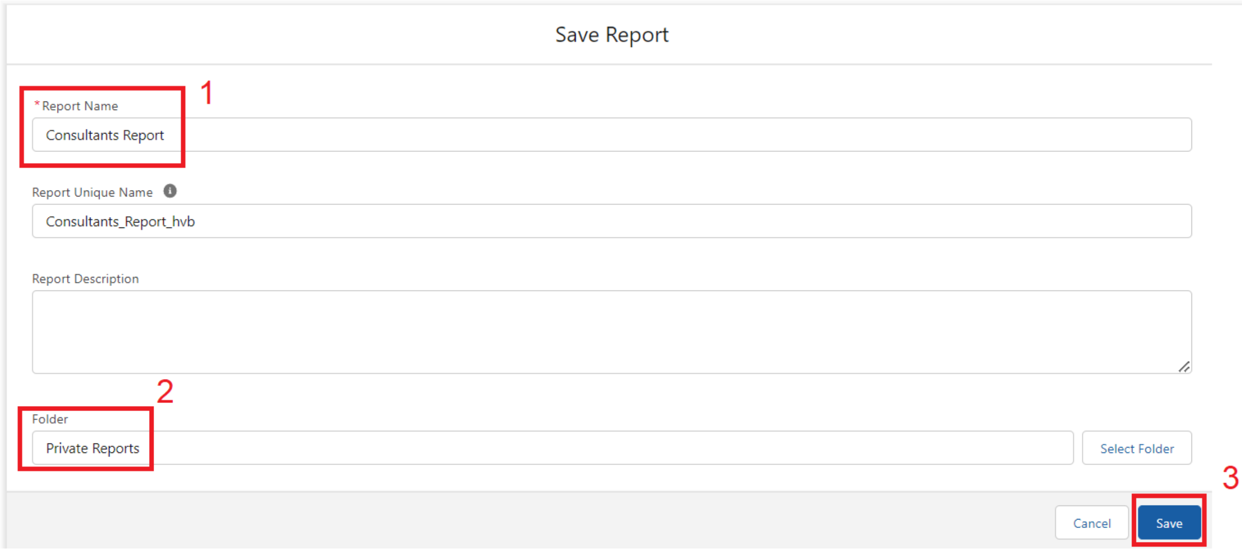
14.In **Group Rows, add the Payment Type Bucket field.**



15.**Click Refresh.**

16.**Click Save** and **Run.**

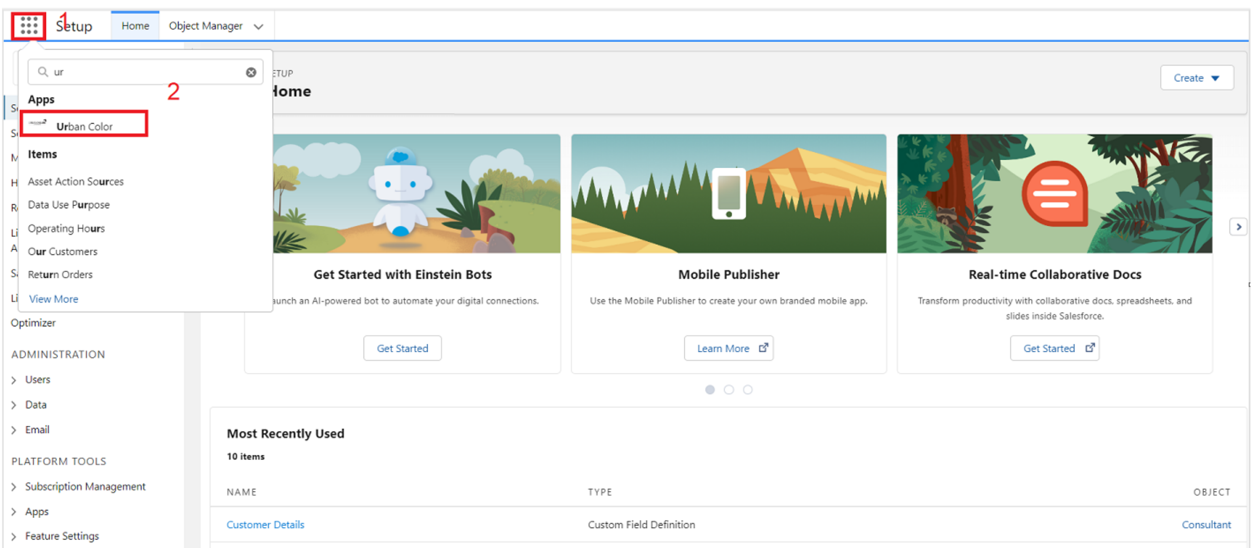
17.Give the report a name, e.g., Consultant Report.



11.2. **View Report**

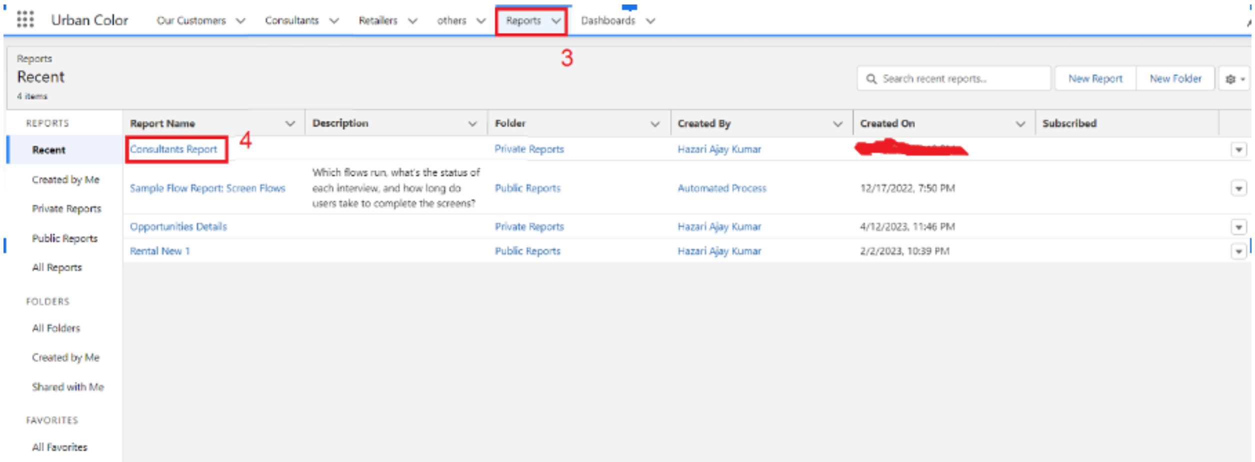
1. Click on the **App Launcher** on the left side of the screen.

2. Search for **Urban Color App** and click on it.



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
3
Reports
Recent
4 items
Search recent reports...
New Report
New Folder
REPORTS
Recent
Created by Me
Private Reports
Public Reports
All Reports
FOLDERS
All Folders
Created by Me
Shared with Me
FAVORITES
All Favorites
Report Name
Description
Folder
Created By
Created On
Subscribed
Consultants Report
4
Private Reports
Hazari Ajay Kumar
Sample Flow Report: Screen Flows
Which flows run, what's the status of each interview, and how long do users take to complete the screens?
Public Reports
Automated Process
12/17/2022, 7:50 PM
Opportunities Details
Private Reports
Hazari Ajay Kumar
4/12/2023, 11:46 PM
Rental New 1
Public Reports
Hazari Ajay Kumar
2/2/2023, 10:39 PM

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.

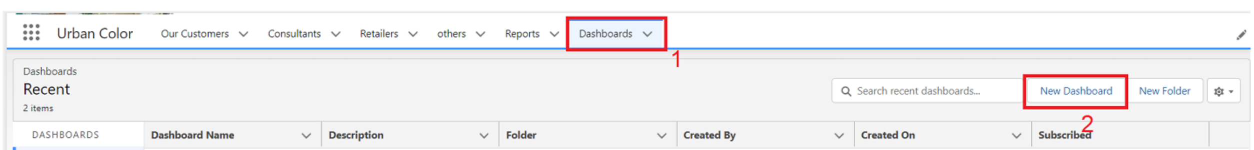
3. **Create a New Dashboard:**

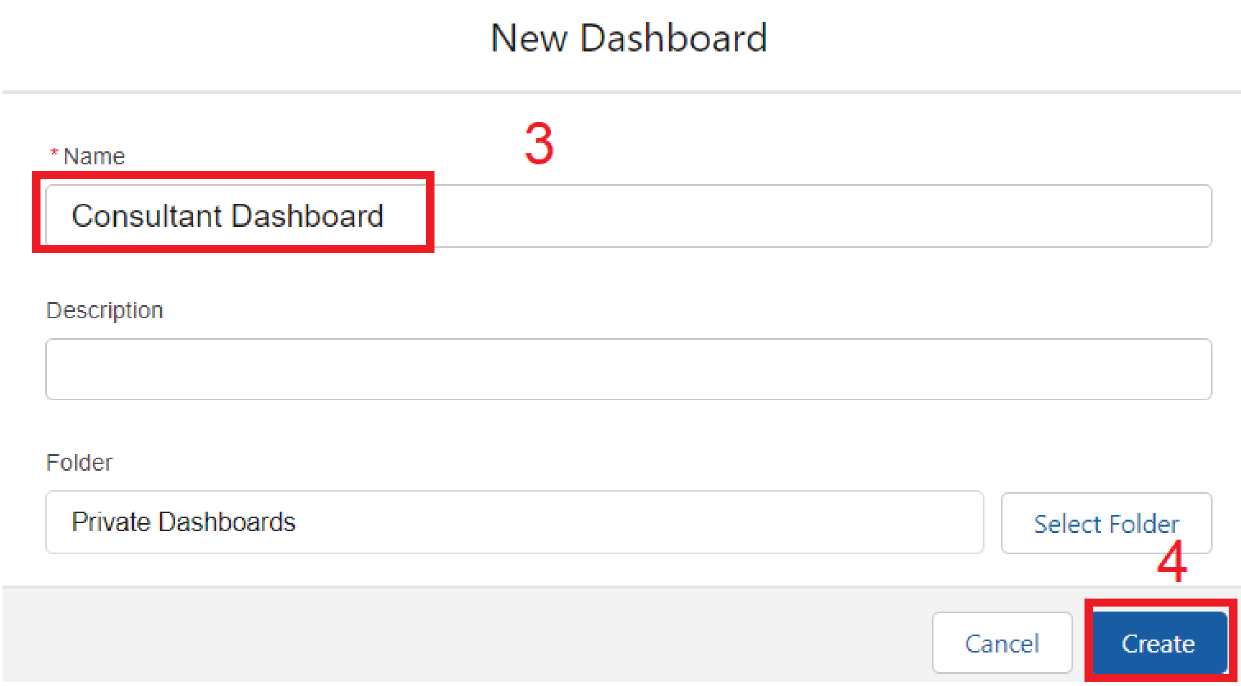
   ■ Click on the "**New Dashboard**" button.

4. Name Your Dashboard:

   ■ Enter "**Consultant Dashboard**" in the name field.

   ■ Click "**Create.**"

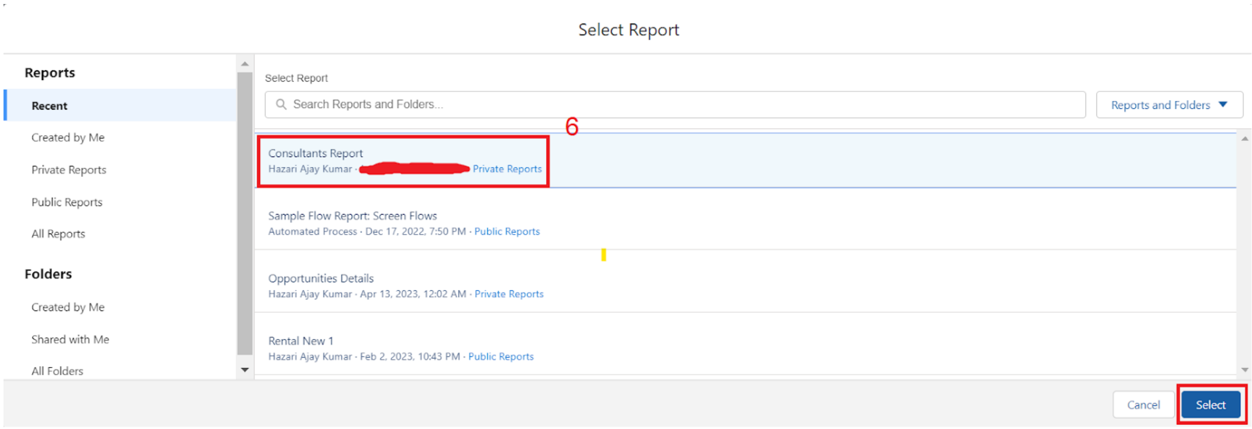




5. **Add Components to the Dashboard:**

■ **Click on "+ Component"** to add a new component.

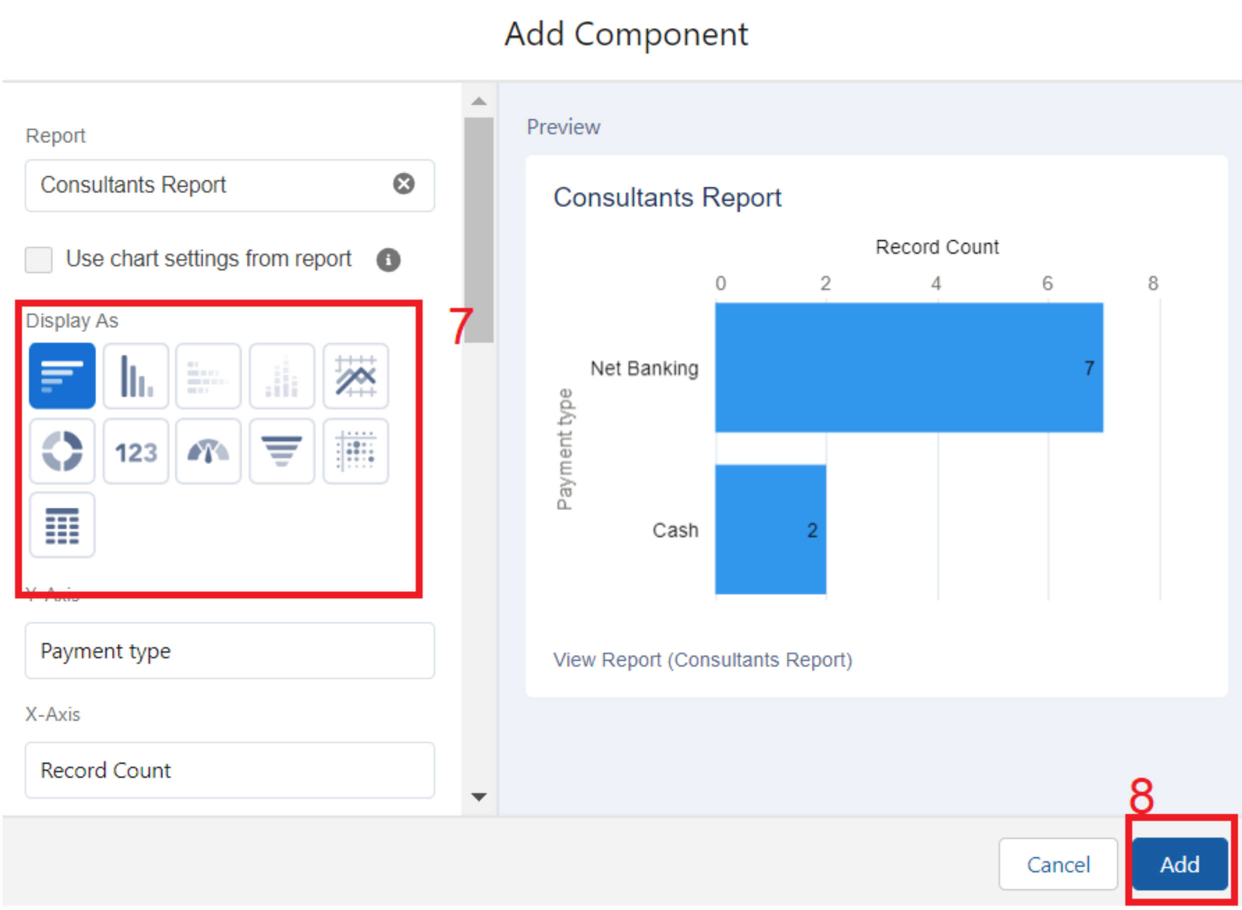
■ Select the **"Consultants Report"** you created earlier.



6. **Choose Data Visualization:**

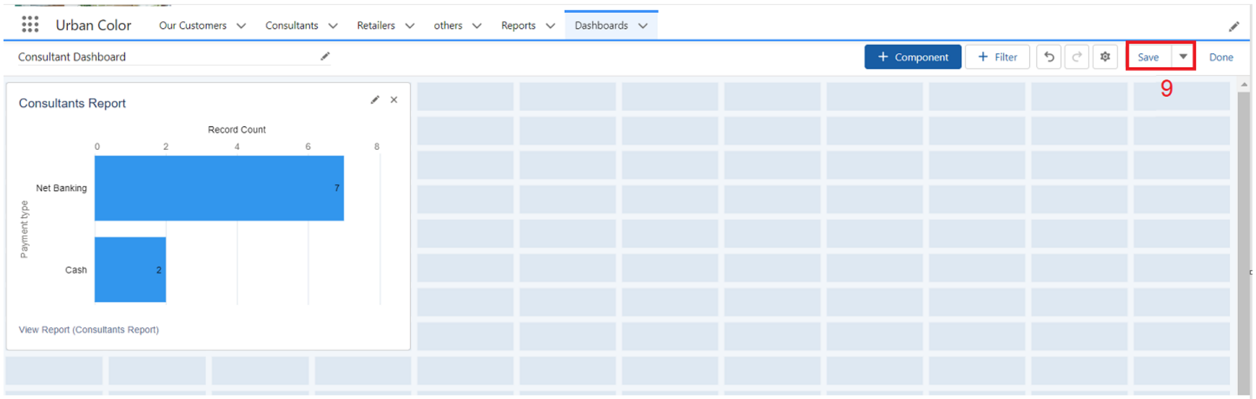
■ Pick a **visualization type** (e.g., chart, table) that best suits your data and needs.

■ **Click "Add."**



7. **Save Your Dashboard:**

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



12.2. **View Dashboard**

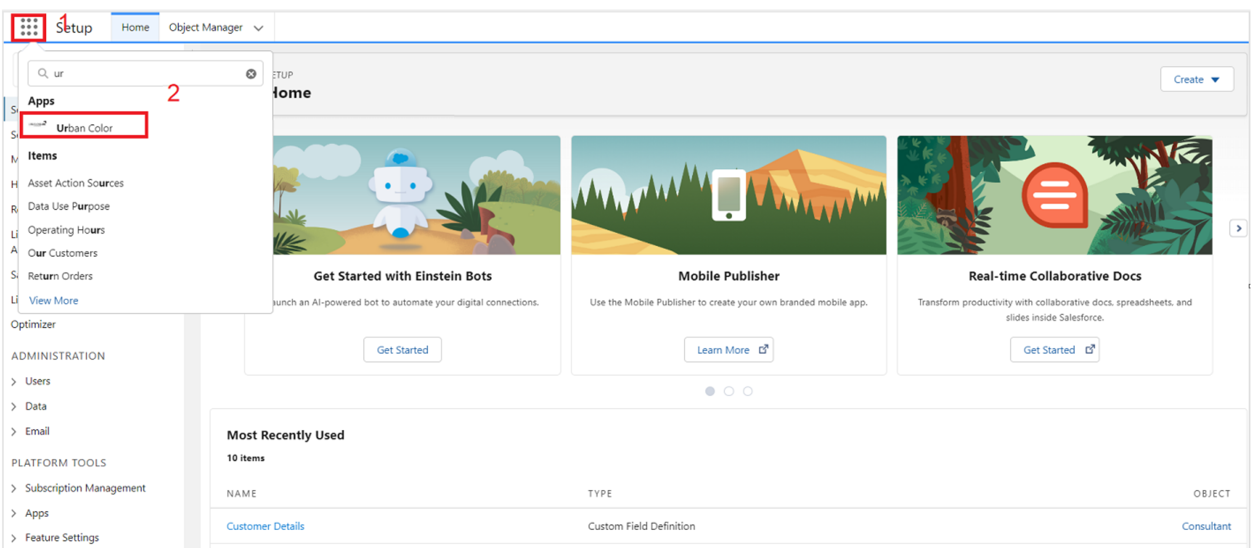
To view the dashboard, follow these steps:

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.