

COSMETIC STORE MANAGEMENT

BY

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ABSTRACT

In today's competitive retail environment, efficient store management is crucial for success. This project aims to develop a Custom Store Management System (CSMS) tailored to the unique needs of individual retail businesses. The CSMS will integrate various functionalities such as inventory management, sales tracking, customer relationship management (CRM), and employee scheduling into a single, user-friendly platform.

The system will utilize advanced data analytics to provide real-time insights into sales trends, inventory levels, and customer preferences, enabling store managers to make informed decisions. Additionally, the CSMS will feature customizable modules that allow businesses to adapt the system to their specific operational requirements, ensuring flexibility and scalability.

By implementing the CSMS, retail businesses can streamline their operations, reduce costs, and enhance customer satisfaction. The project will involve a comprehensive analysis of existing store management practices, the design and development of the system, and rigorous testing to ensure reliability and efficiency. The ultimate goal is to create a robust tool that empowers store managers to optimize their resources and achieve sustainable growth.

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Description :

A **Cosmetic Store Management** system is a comprehensive solution designed to manage and optimize the operations of a cosmetics retail business. It facilitates inventory tracking, ensuring the timely restocking of beauty products, and monitors expiration dates for items like skincare and makeup. The system enhances customer service by storing purchase histories and preferences, allowing for personalized recommendations and promotions. It simplifies billing, sales transactions, and supports multiple payment methods, while also generating insightful reports on sales, inventory, and customer trends. Additionally, it helps manage suppliers, employee schedules, and security features to ensure smooth, efficient store operations.

TASK-1: CREATION OF SALESFORCE ORG

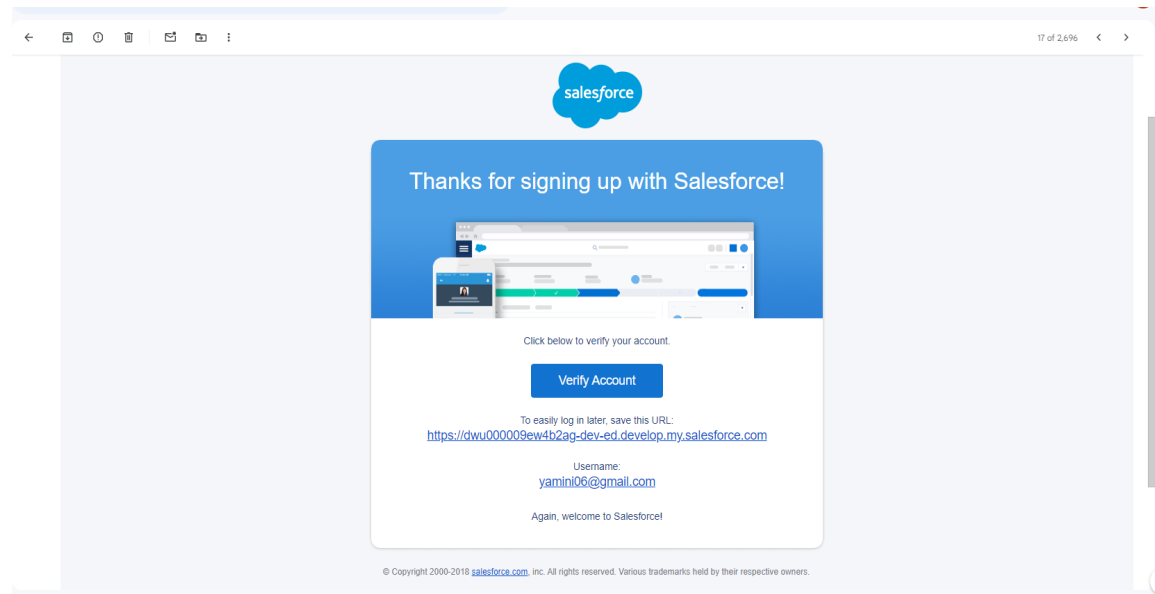
Creating a developer org in salesforce:

- ☆ Go to developers.salesforce.com/signup.
- ☆ Click on sign up. fill the details
- ☆ Username should be in the form of username@organization.com

Account Activation:

Go to the inbox and click on that email and verify account to activate account.

The email may take 5-10mins, as



Login To our Salesforce Account:

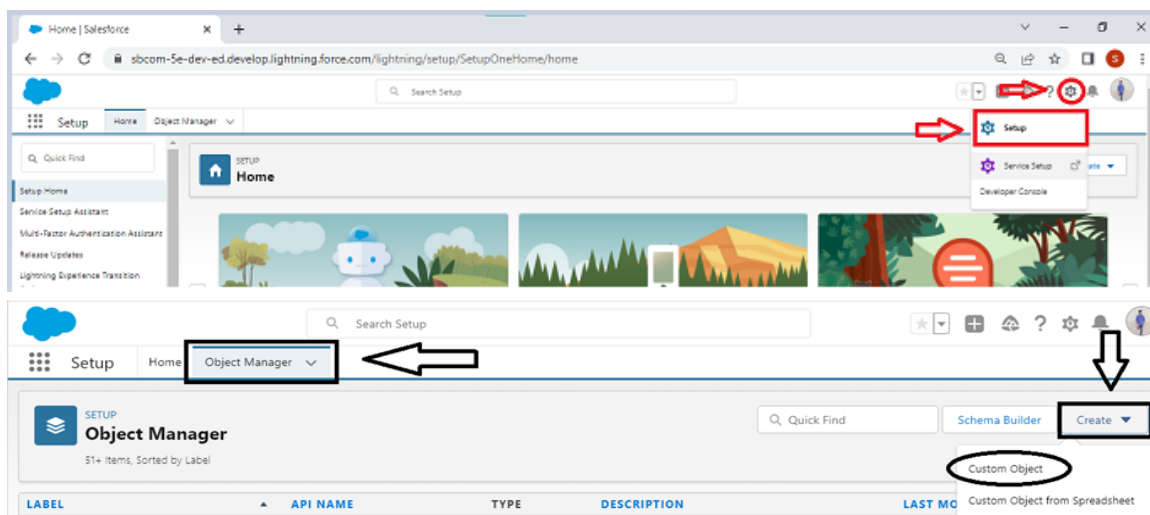
- Go to salesforce.com and click on login.
- Enter the username and password that we just created.

TASK-2: CREATING OBJECTS

Creation of Objects for Urban Color, For this Urban Color we need to create 4 objects i.e .,Our Customers,Consultants,Retailers,others. The below steps will assist you in creating those objects.

- Click on the gear icon and then select Setup.
- Click on the object manager tab just beside the home tab.
- After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
- Creation of Our Customer Object On the Custom Object Definition page, create the object as follows:
 - Label: Our Customer ,Plural Label: Our Customers ,Record Name: Our Customer
 - Check the Allow Reports checkbox
 - Check the Allow Search checkbox and click save. Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs.
 - Under Custom Object Tabs, click New.
 - For Object, select Our Customer.
 - For Tab Style, select any icon.
 - Leave all defaults as is. Click Next, Next, and Save.

We need to create 4 objects named Our customer, Consultant, Retailer, Others. For creating the another 3 objects, we need to follow the same procedure as mentioned above. After the completion of object creation task, We'll move on to further steps.



TASK-3:Fields and Relationship

- An object relationship in Salesforce is a two-way association between two objects. Relationships are created by creating custom relationship fields on an object. This is done so that when users view records, they can also see and access related data.
- Fields in Our Customers objects :
- Fields in Our Customers objects follow below data types:

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

- Fields in Consultants objects :
- Fields in Consultants objects follow below data types:

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

- * Fields in Retailer objects :
- * Fields in Retailer objects follow below data types:

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

- * Fields in others objects :
- * Fields in others objects follow below data types:

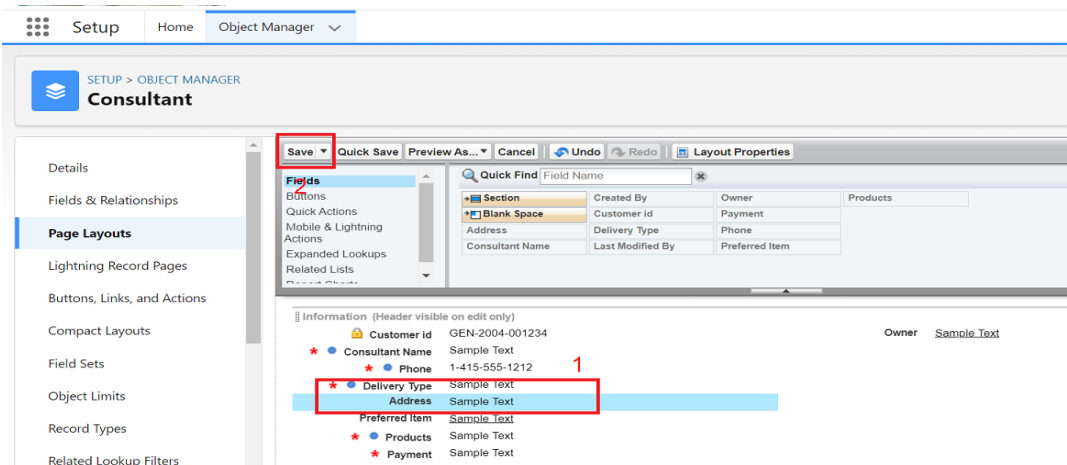
S No	Field Label	Data Type
1	Name	Text
2	Employee 1)Company Employee 2)Staff 3)Special Reference	Picklist
3	Coupon	Text
4	Products 1)Lipstick 2)Compact 3)EyeLiner 4)FacePack 5)Lip Balm 6)Nail Polish	Multi-Picklist

In the Cosmetic Store Management System built on Salesforce, fields and relationships are designed to streamline operations and enhance data management. Key fields include customer details (e.g., contact information and purchase history), product specifics (e.g., SKU, price, and inventory levels), order details (e.g., order status and shipping info), marketing campaign attributes, and case management elements. Relationships are structured to connect these fields efficiently: customers can have multiple orders and cases, each order can include multiple products, and products are linked to inventory and suppliers.

TASK-4:Page Layouts

In Salesforce, page layouts define the organisation 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 organisation.

- From the Salesforce setup menu, go to "Object Manager" and select the Consultants object.
- Click on "Page Layouts" in the left sidebar. This will display a list of available page layouts for the selected object.
- Select the Consultant Layout page layout.
- Click And Drag Delivery type and Address Fields Below Phone field.
- Click on Save



- Creating a page layout in Salesforce involves navigating to the object manager, selecting the relevant object, and either creating a new layout or editing an existing one. You can design the layout by dragging and dropping fields, adding sections and related lists, and including buttons or links as needed. Customize field properties and section settings to suit user needs, then save and assign the layout to specific profiles or record types. Finally, preview and test the layout to ensure it is functional and meets user requirements.

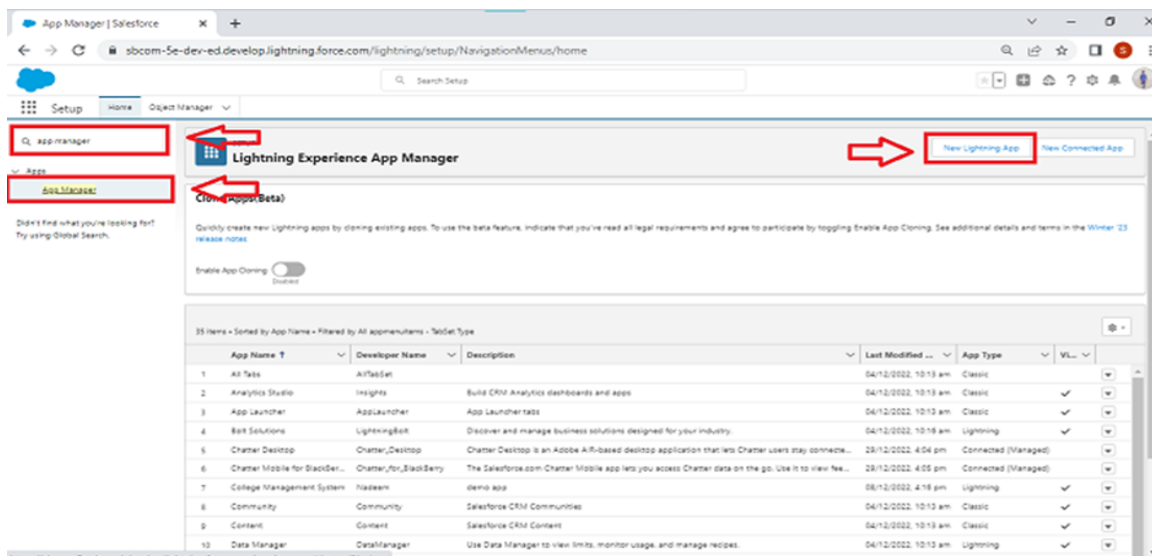
●

TASK-5: The Lightning App

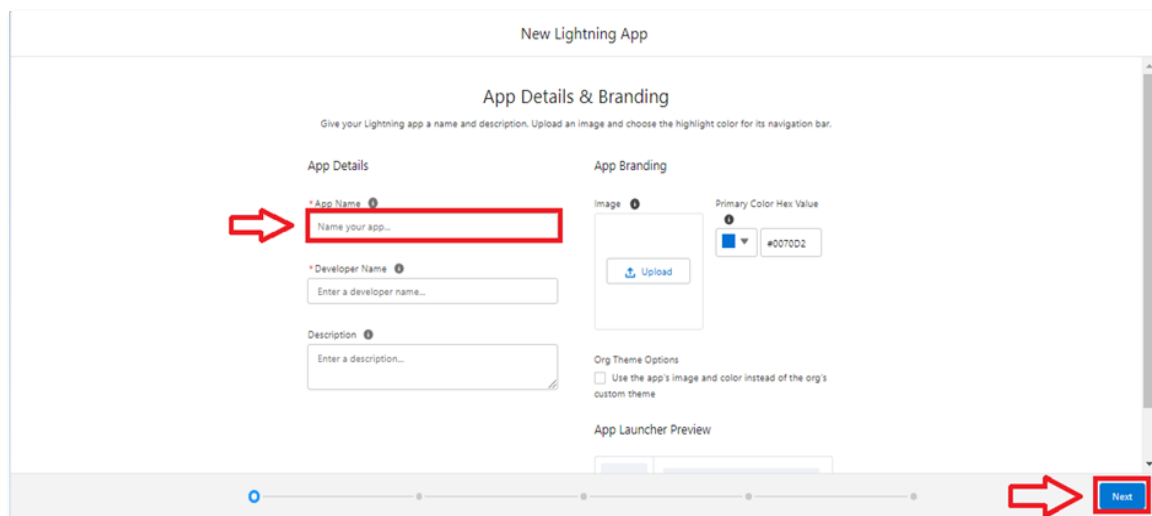
An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

To create a lightning app page:

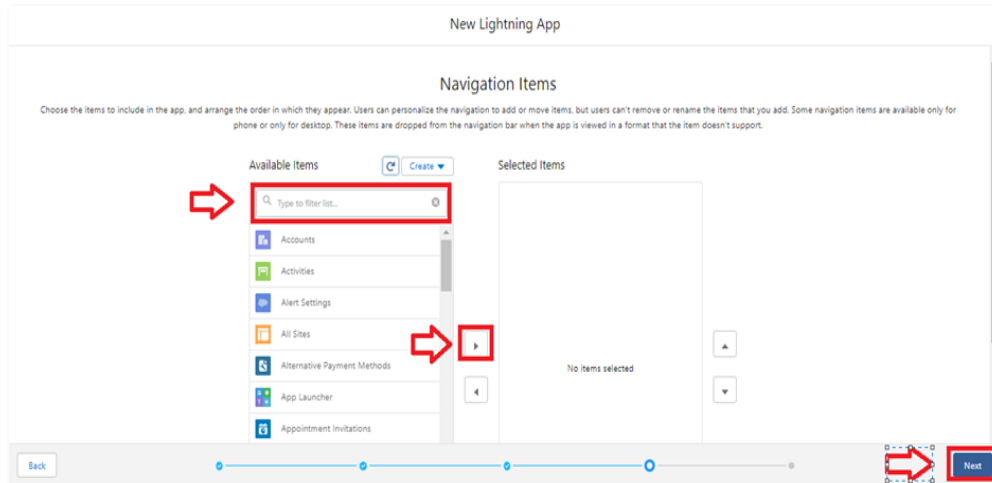
Go to setup page --> search “app manager” in quick find --> select “app manager” --> click on New lightning App.



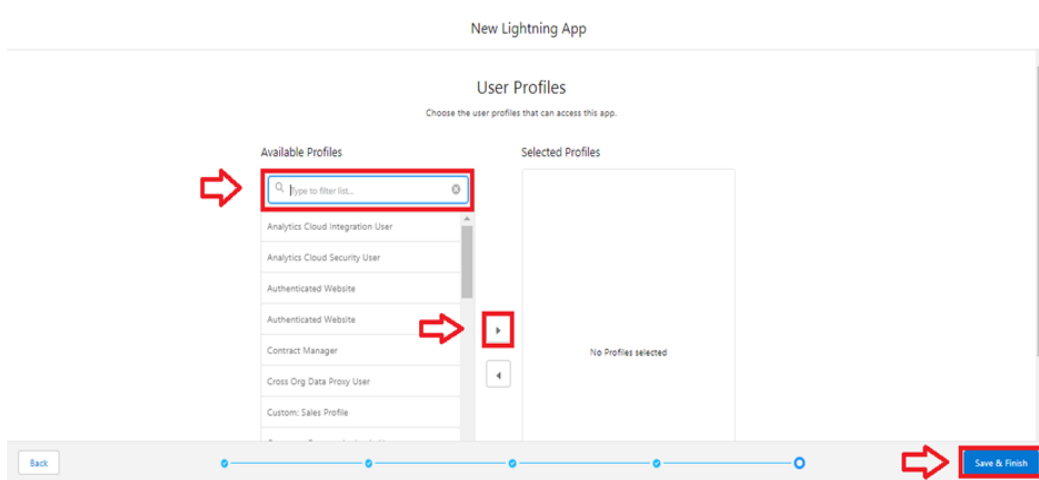
Fill the app name as Urban Color in app details and branding --> Next --> (App option page) keep it as default --> Next --> (Utility Items) keep it as default --> Next.



- To Add Navigation Items:



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



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

TASK-6:Profile

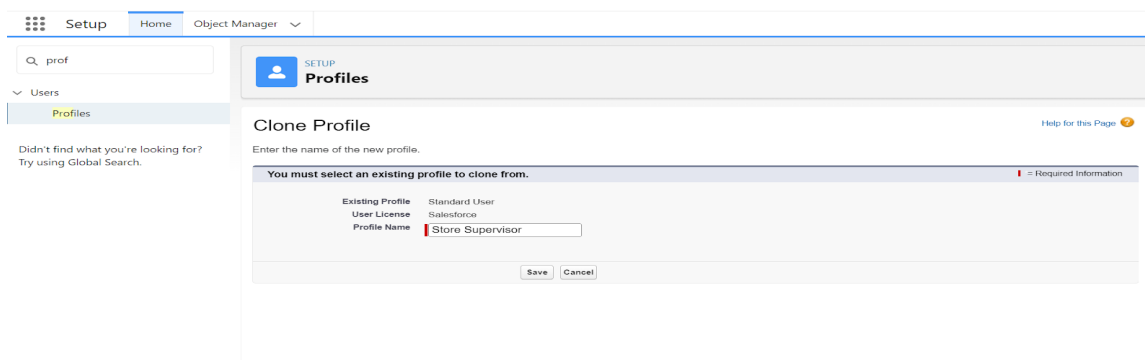
A profile is a group/collection of settings and permissions that define what a user can do in salesforce. A profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login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

Creating a Profiles:Now create a Store Supervisor profile and set its object permissions.

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

To create a new profile:

Go to setup --> type profiles in quick find box --> click on profiles --> clone the desired profile (standard user is preferable) --> enter profile name --> save.



The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar on the left contains 'prof'. The left sidebar shows 'Users' and 'Profiles'. The main content area displays the 'Clone Profile' dialog box. The dialog box has a title bar 'Clone Profile' and a subtitle 'Enter the name of the new profile.' Below this, a message states 'You must select an existing profile to clone from.' A table lists existing profiles: 'Standard User' with 'Salesforce' as the user license. The 'Profile Name' field is set to 'Store Supervisor'. At the bottom of the dialog box are 'Save' and 'Cancel' buttons.

- While still on the profile page, then click Edit.
- Scroll down to the Custom object permission and give all access to the Consultants, Others, Our Customers, Retailers object.

The screenshot shows the 'Profiles' page in the Salesforce Setup interface. It displays a table of permissions for various objects. The 'Consultants' profile is highlighted, and its permissions are shown as checked (blue) for all objects listed. The objects include Async Operation Results, Back Synchs, Branches, Change Bundles, Change Bundle Installs, Change Submissions, Commercial Vehicles, Consultants, Customers1, Customer Details, Deploy Components, Deployment Results, others, Our Customers, Pipelines, Pipeline Stages, Projects, Properties, Remote Changes, Rentals, Repositories, Retailers, Semesters, and Source Member References.

The screenshot shows the 'Password Policies' page in the Salesforce Setup interface. It displays various password policy settings that can be configured. The settings include: 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 (unchecked), Require a minimum 1 day password lifetime (unchecked), and Don't immediately expire links in forgot password emails (unchecked). The 'Save' button is visible at the bottom.

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

The screenshot shows the 'Clone Profile' page in the Salesforce Setup interface. It displays the 'Clone Profile' section where a new profile can be created by cloning an existing one. The 'Existing Profile' is set to 'Standard Platform User' and the 'Profile Name' is 'Billing Operator'. The 'Save' button is visible at the bottom.

- Click on save

TASK-7:Setting up Roles

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

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

Setup Home Object Manager

roles

Users

Roles

Feature Settings

Sales

Contact Roles on Contracts

Contact Roles on Opportunities

Service

Case Teams

Case Team Roles

Contact Roles on Cases

Role Edit

SETUP Roles

Role Edit

New Role

Role Edit

Label Store Head

Role Name Store_Head

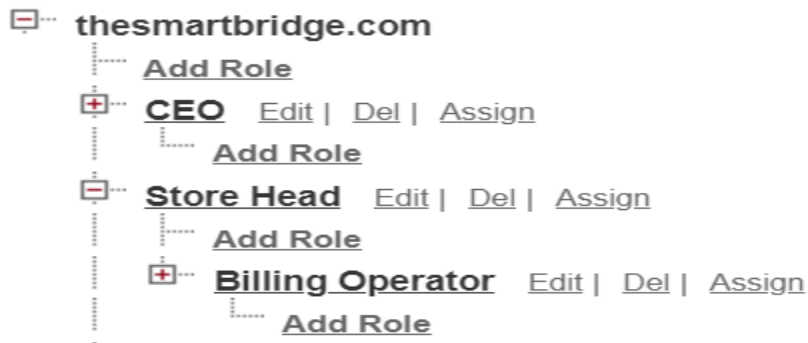
This role reports to thesmartbridge.com

Role Name as displayed on reports

Save Save & New Cancel

Your Organization's Role Hierarchy

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



TASK-8: Creation of an User

- In Salesforce, a user represents an individual who has access to the Salesforce platform and its functionalities. Each user is assigned a unique username, and their access level and permissions are defined by their profile and role within the organization. Users can perform tasks such as managing records, running reports, and collaborating with team members based on their assigned permissions. Salesforce administrators configure user settings, including login credentials, security settings, and access to various features and data, ensuring that users can efficiently and securely perform their job functions.

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

The screenshot shows the Salesforce Setup interface. On the left, the 'Setup' menu is open, and 'Users' is selected under 'User Management Settings'. The main area displays the 'User Edit' form for a new user. The form is divided into two columns. The left column contains fields for 'First Name' (Amar), 'Last Name' (K), 'Alias' (ak), 'Email' (mailid@gmail.com), 'Username' (amark2133@salesforce.com), 'Nickname' (User167161323313747430), 'Title' (Store Supervisor), 'Company', 'Department', and 'Division'. The right column contains fields for 'Role' (Store Head), 'User License' (Salesforce), 'Profile' (Store Supervisor), 'Active' (checked), 'Marketing User' (unchecked), 'Offline User' (unchecked), 'Knowledge User' (unchecked), 'Flow User' (unchecked), 'Service Cloud User' (unchecked), 'Site.com Contributor User' (unchecked), 'Site.com Publisher User' (unchecked), 'WDC User' (unchecked), and 'Data.com User Type' (None--). The 'Save' button is visible at the top right of the form.

TASK-9: Creating/Modifying Records

Creating or modifying records in Salesforce involves navigating to the relevant object tab, clicking “New” to create a record or “Edit” to update an existing one. For creating records, users fill out the necessary fields and click “Save” to store the new data. For modifications, users locate the record, make the desired changes in the editable fields, and then click “Save” to apply the updates. This process ensures accurate and up-to-date information within the Salesforce system.

Steps to Create a Record:

Navigate to the Object Tab:

- Log in to Salesforce and go to the relevant object tab (e.g., Accounts, Contacts, Opportunities).

Click “New”:

- On the object’s home page or list view, click the “New” button to initiate the creation of a new record.

Enter Record Information:

- Complete the fields in the record form with the required and optional data. This may include details like names, addresses, dates, and other relevant information.

Save the Record:

- Once all necessary information is entered, click “Save” to create and store the new record in Salesforce.

Steps to Modify a Record:

Find the Record: ▪ Locate the record you want to modify by using the object’s list view, search function, or related lists.

Open the Record: ▪ Click on the record’s name to open it and view its details.

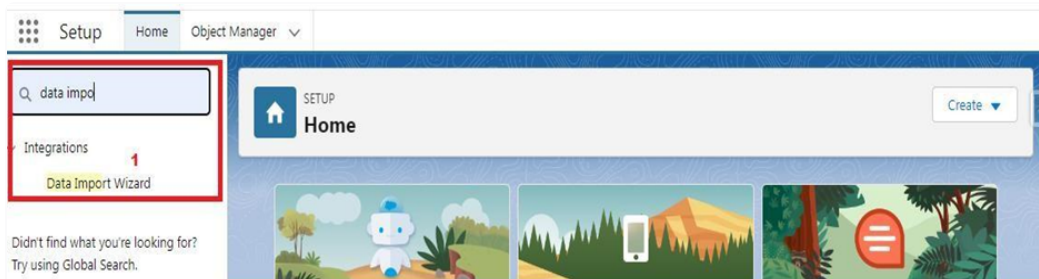
Click “Edit”: ▪ In the record’s detail view, click the “Edit” button to enable editing mode.

Update Record Information: ▪ Make the necessary changes to the fields as required. Ensure all required fields are correctly filled out.

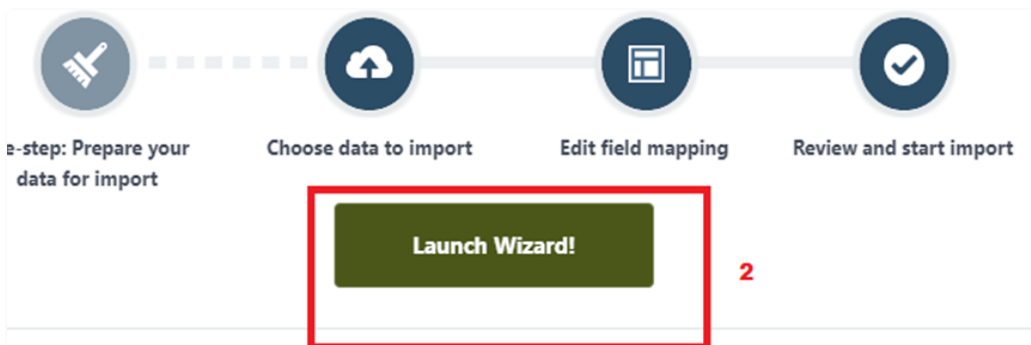
Save the Changes: ▪ After making the updates, click “Save” to apply and store the modifications. These steps ensure that records are properly created and updated, maintaining accurate and current data in Salesforce.

TASK-10: Importing Data

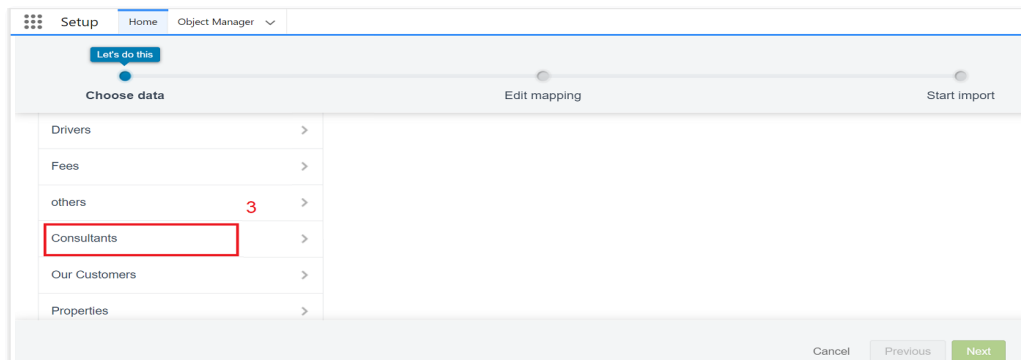
- From Setup, click the Home tab.
- In the Quick Find box, enter Data Import and select Data Import Wizard



- Click Launch Wizard!



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



- Select Add new records.
- Click CSV and choose file Consultant_CSV which we made earlier. Click Next.
- Since the field names in the CSV file (CSV Header) are the same as the field names in your object (Mapped Salesforce Object), the fields are automatically mapped. Click Next.

Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	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		Babuc34@gmail.com

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

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

Your selections:

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

Your import will include:

Mapped fields: 7

Your import will not include:

Unmapped fields: 0

Start Import

- 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

- 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)	Appt Processing Time (ms)	Records Processed	Records Failed	Retry Count	State Message	Status		
View Request	View Result	7512w00000Xqqr	6/19/2023, 11:05 PM	6/19/2023, 11:05 PM	103	52	0	9	0	0		Completed		

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

TASK-11:Accessing Reports :

- 1.Click App Launcher
- 2.Select Urban Color App
- 3.Click reports
- 4.Click New Report.
- 5.Click the report type as Consultants Click Start report.
- 6.Customize your report, in Columns select - ConsultantName,Delivery type,Products,Payment.
- 7.Click on the drop down option on the payment column and select Bucket this column.
- 8.Bucket Name as Payment type
- 9.Click on Add Bucket and name it as NetBanking
- 10.Click on Add Bucket and name it as Cash
- 11.Now Click on All Values and select Credit card,Debit card,Upi and Move to Net Banking.
- 12.Now Click on All Values again and select Cash and Move to Cash.
- 13.Click on Apply.

Edit Bucket Column

* Field: Payment ×

* Bucket Name: Payment type

All Values (4)

Unbucketed Values (4)

Search Values

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

Add Bucket Move To

Cancel Apply

Edit Bucket Column

* Field: Payment ×

* Bucket Name: Payment type

All Values (4)

Unbucketed Values (4)

Search Values

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

Add Bucket Move To

Cancel Apply

14. In Group Rows Add Payment Type Bucket Field.

15. Click refresh

16. Click Save and Run

17. Give report name – Consultant report

18. Click Save

REPORT ▼
New Consultants Report ✎ Consultants

Previewing a limited number of records. Run the report to see everything.

Payment type	Consultant: Consultant Name	Delivery Type	Products	Payment
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
Subtotal				
Cash (2)	Dev Raj	Self Pickup	Lipstick	Cash
	Shankar	Self Pickup	Face Pack	Cash
Subtotal				
Total (9)				

Save Report

Report Name
Consultants Report

Report Unique Name
Consultants_Report_hvb

Report Description

Folder
Private Reports

Select Folder

Cancel Save

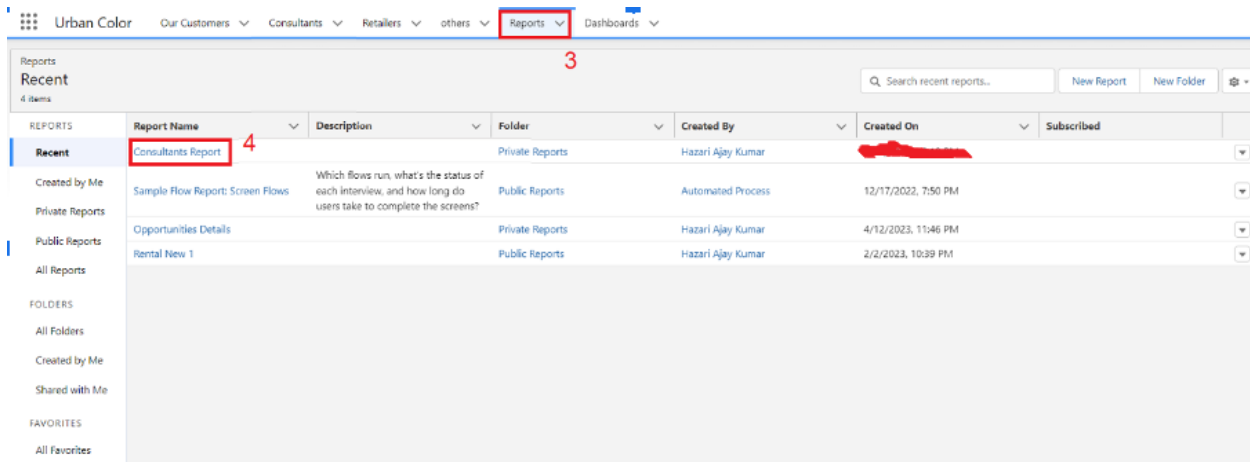
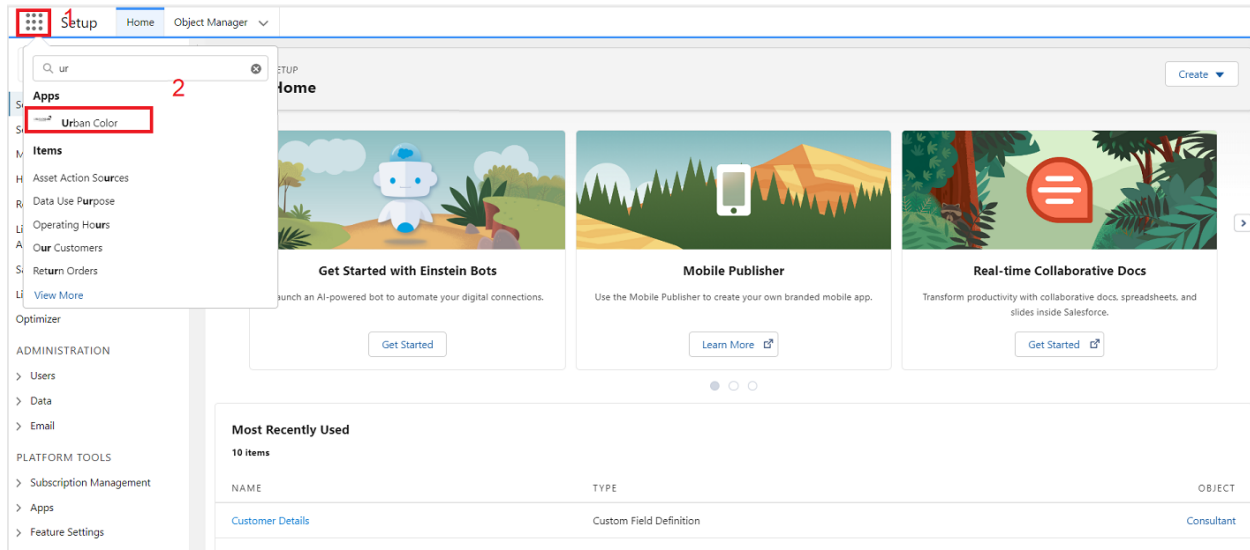
View Reports :

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

Search Urban Color App & click on it.

Click on Reports Tab.

Click on Urban Color Report and see records



Task 11 : Working with dashboards

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

New Dashboard

*** Name** 3

Consultant Dashboard

Description

Folder

Private Dashboards

Select Folder

4

Cancel

Create

Select Report

Reports

Recent

Created by Me

Private Reports

Public Reports

All Reports

Folders

Created by Me

Shared with Me

All Folders

Select Report

Consultants Report
Hazari Ajay Kumar - Private Reports

Sample Flow Report: Screen Flows
Automated Process - Dec 17, 2022, 7:50 PM - Public Reports

Opportunities Details
Hazari Ajay Kumar - Apr 13, 2023, 12:02 AM - Private Reports

Rental New 1
Hazari Ajay Kumar - Feb 2, 2023, 10:43 PM - Public Reports

Cancel

Select

Add Component

Report

Consultants Report

✕

☐ Use chart settings from report ⓘ

Display As

☰

Bar

📊

Line

📈

Area

📉

Waterfall

📊

Table

Y-Axis

Payment type

X-Axis

Record Count

Preview

Consultants Report

Payment type	Record Count
Net Banking	7
Cash	2

View Report (Consultants Report)

Cancel

Add

Urban Color Our Customers ▾ Consultants ▾ Retailers ▾ others ▾ Reports ▾ Dashboards ▾

Consultant Dashboard

+ Component + Filter ↶ ↷ ⚙ **Save ▾** Done

Consultants Report

Payment Type	Record Count
Net Banking	7
Cash	2

View Report (Consultants Report)

View Dashboard :

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

