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.

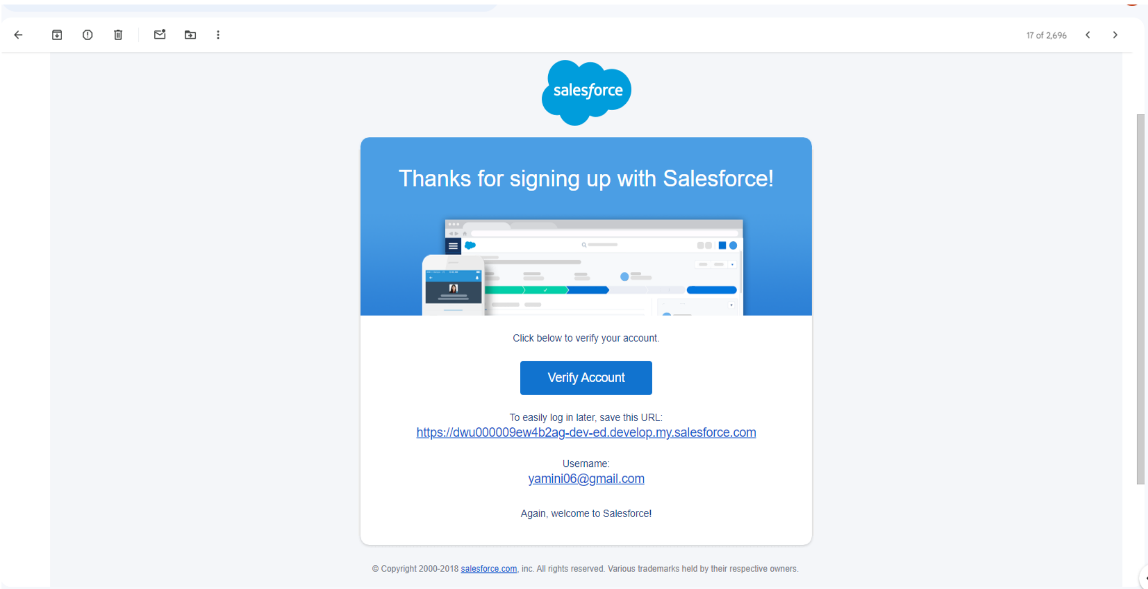
TASK-1: CREATION OF SALESFORCE ORG

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:

0Go 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.

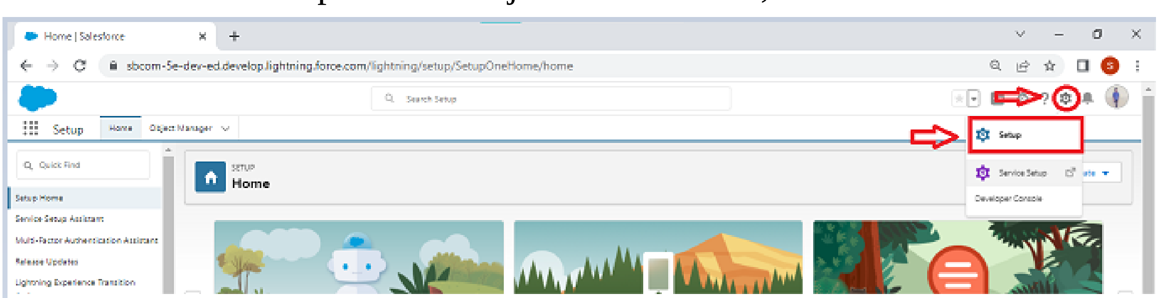
● Under Custom Object Tabs, click New.

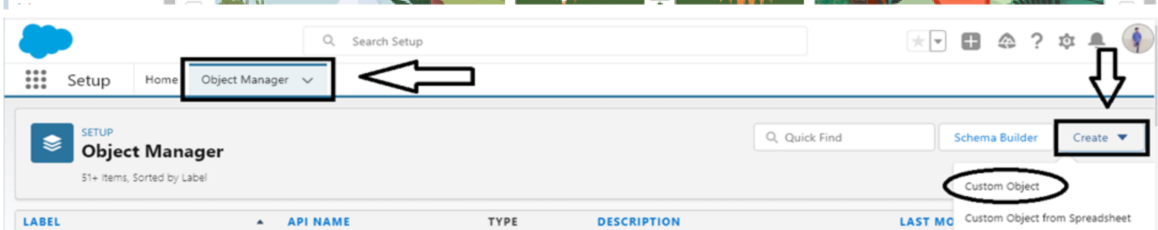
●For Object, select Our Customer.

● 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	
	2)Compact 3)EyeLiner 4)FacePack 5)Lip Balm 6)Nail Polish	Multi-Picklist
7	Payment 1)Debit Card 2)Credit Card 3)UPI 4)Cash	Picklist
8	Customer details	Lookup(Our Customers Object)
9	Address	Text Long

* Fields in 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 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)

* 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

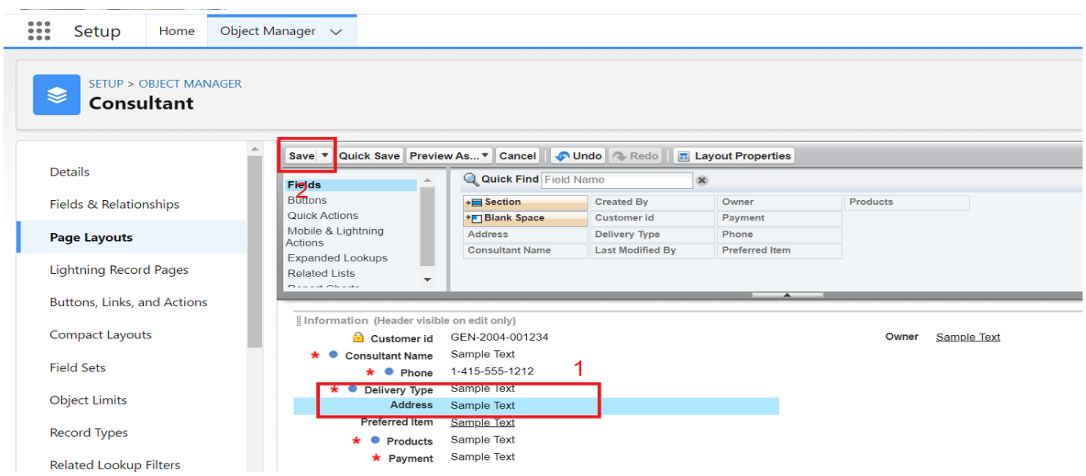
In the Cosmetic Store Management System built on Salesforce, fields and relationships are designed to streamline operations and enhance data management. Key fields include customer details (e.g., contact information and purchase history), product specifics (e.g., SKU, price, and inventory levels), order 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:<u>Page Layouts</u>

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.
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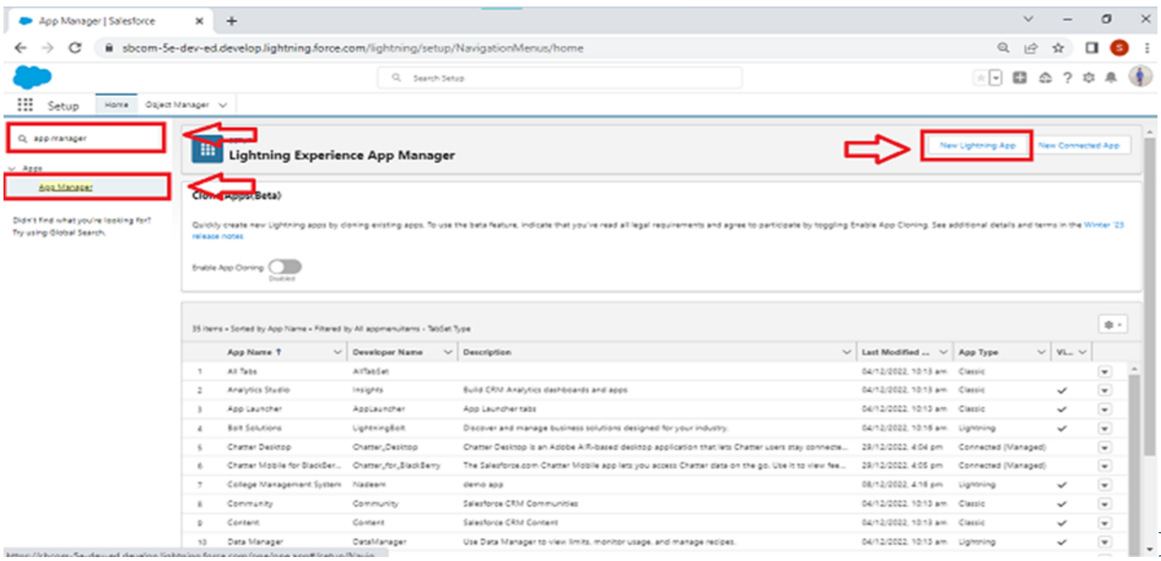
TASK-5:<u>The Lightning App</u>

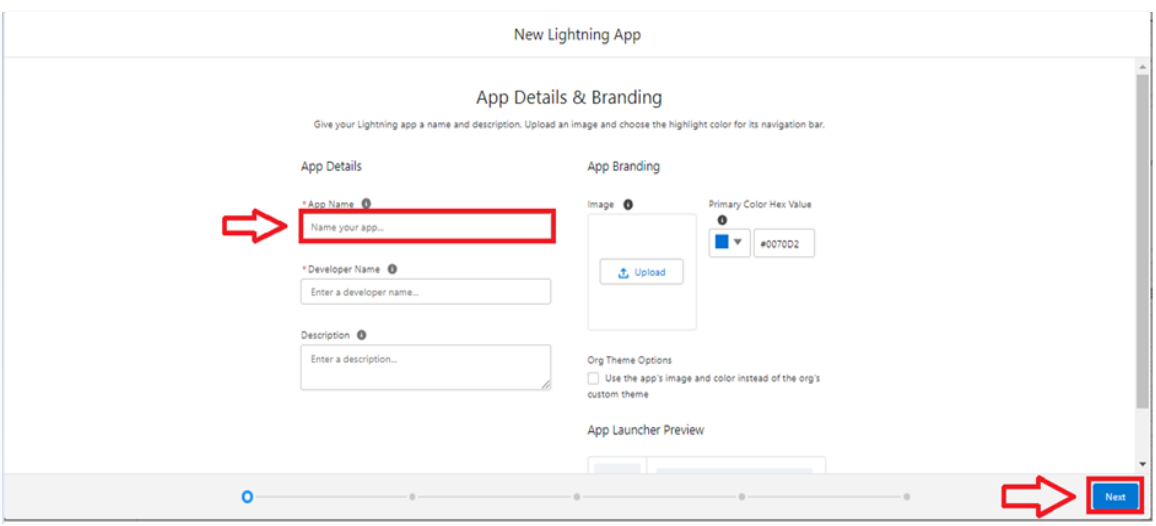
An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

To create a lightning app page:

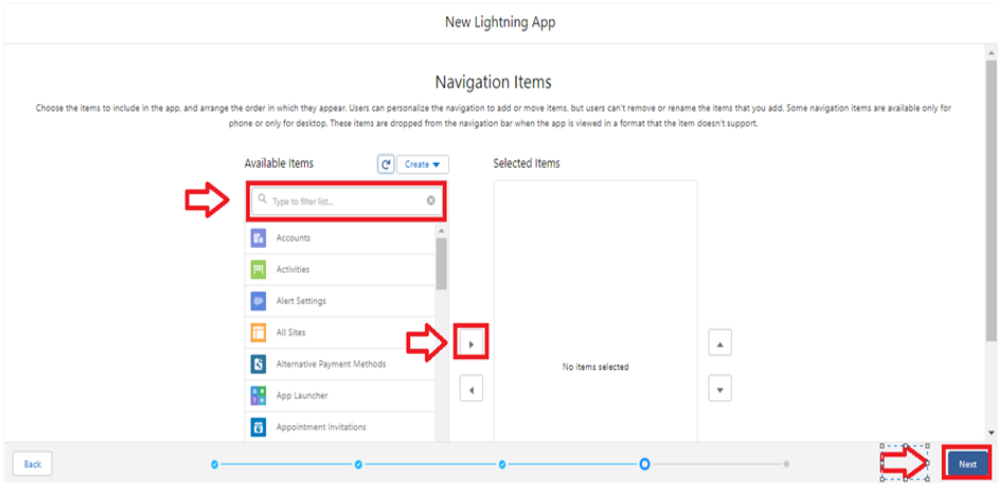
Go to setup page --> search “app manager” in quick find --> select “app manager” --> click on New lightning App.



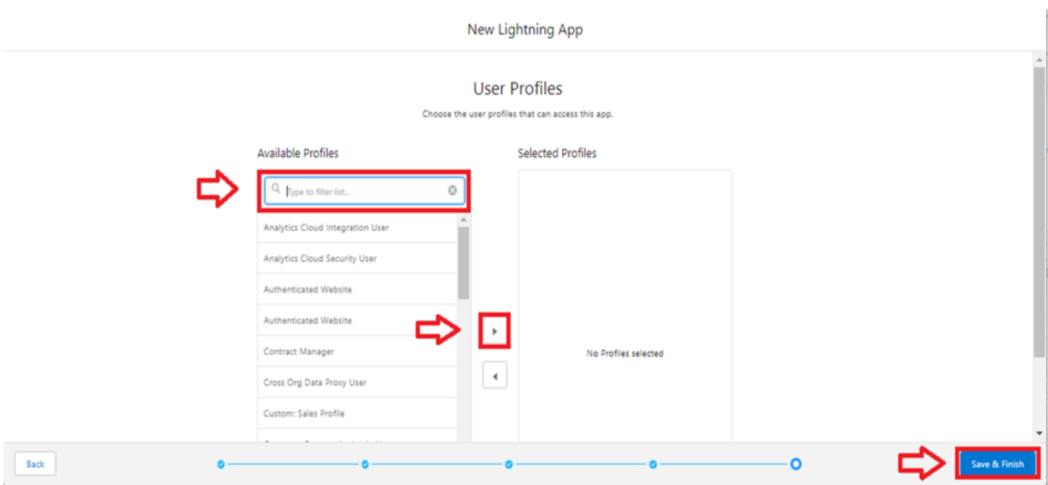
Fill the app name as Urban Color in app details and branding --> Next --> (App option page) keep it as default --> Next --> (Utility Items) keep it as default --> Next.



- 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

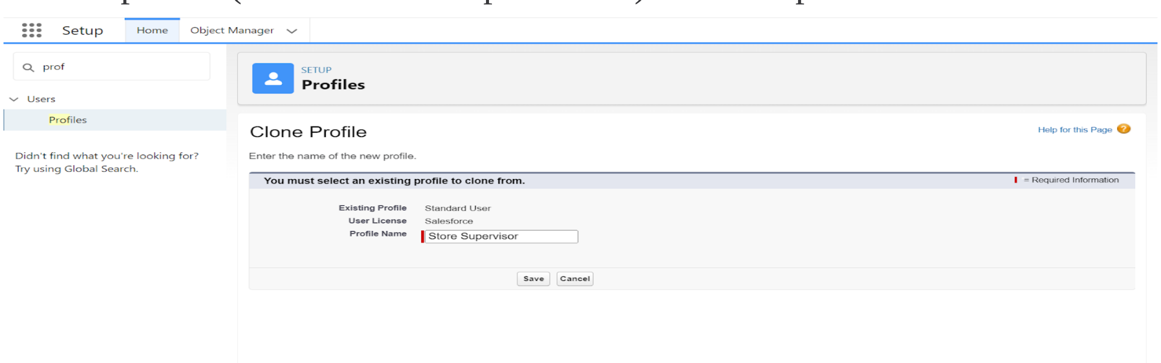
A profile is a group/collection of settings and permissions that define what a user can do in salesforce. A profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login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

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

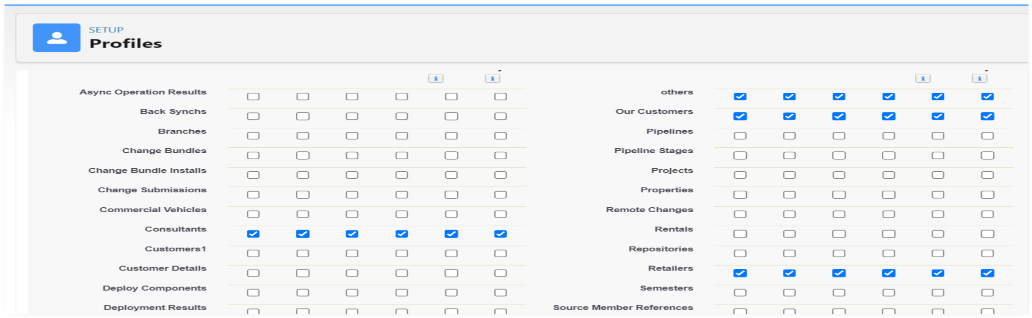
- From Setup enter Profiles in the Quick Find box, and select Profiles.
- From the list of profiles, find Standard User.
- Click Clone.
- For Profile Name, enter Store Supervisor.
- Click Save.
- While still on the Store Supervisor profile page, then click Edit.
- Scroll down to Custom Object Permissions 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.

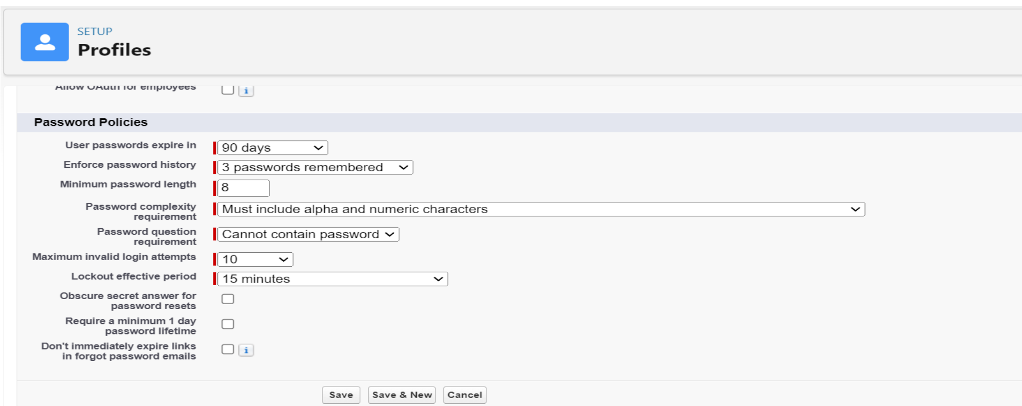
To create a new profile:

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



- 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.





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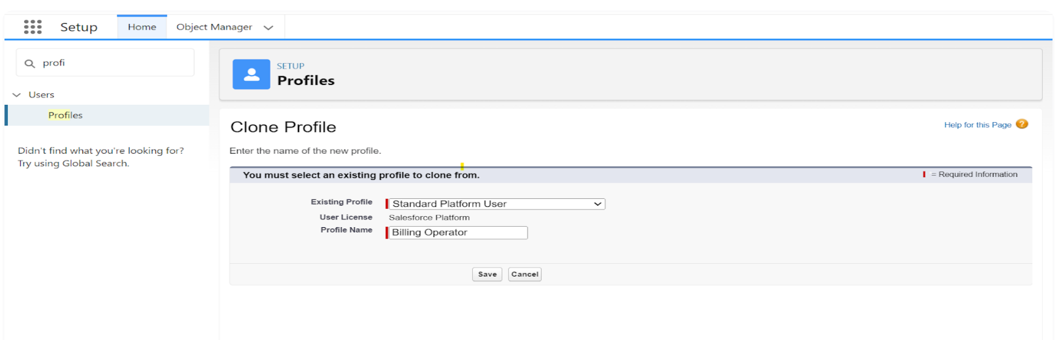
- Click on Save.
- Similarly Create operator profile ,Clone Salesforce Platform user and give access only for Billing Operator.

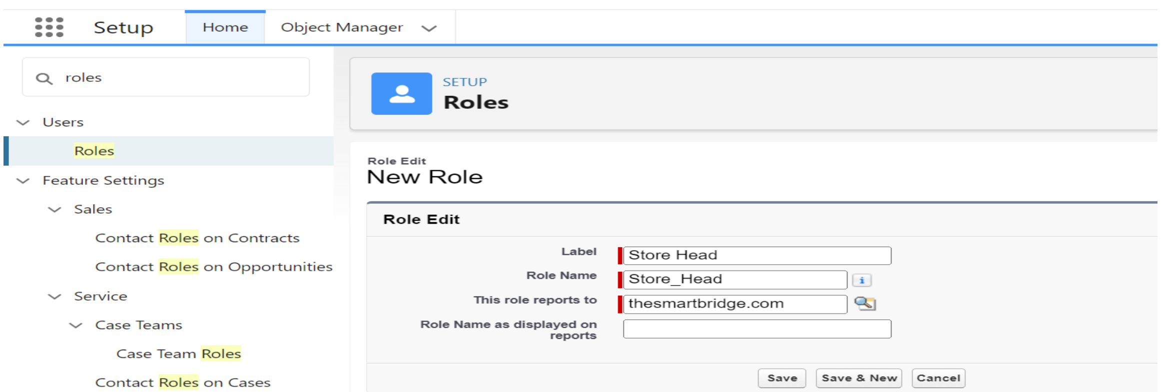


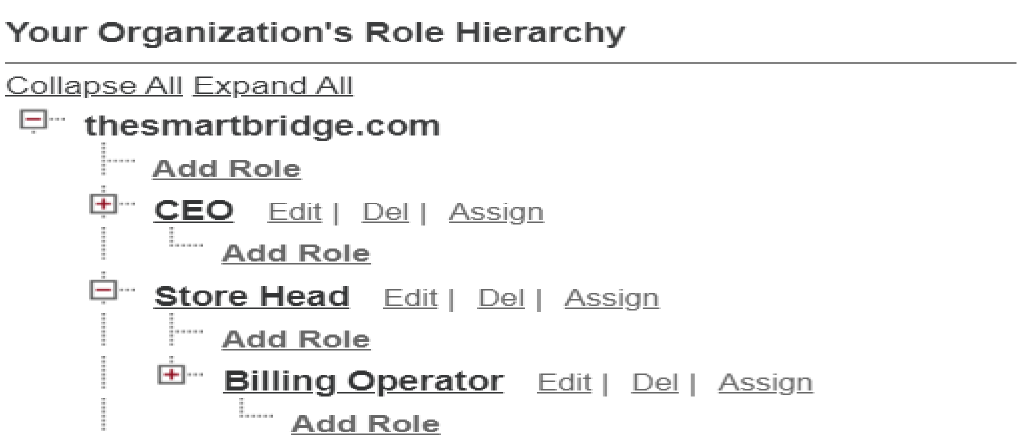
- Click on save

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.

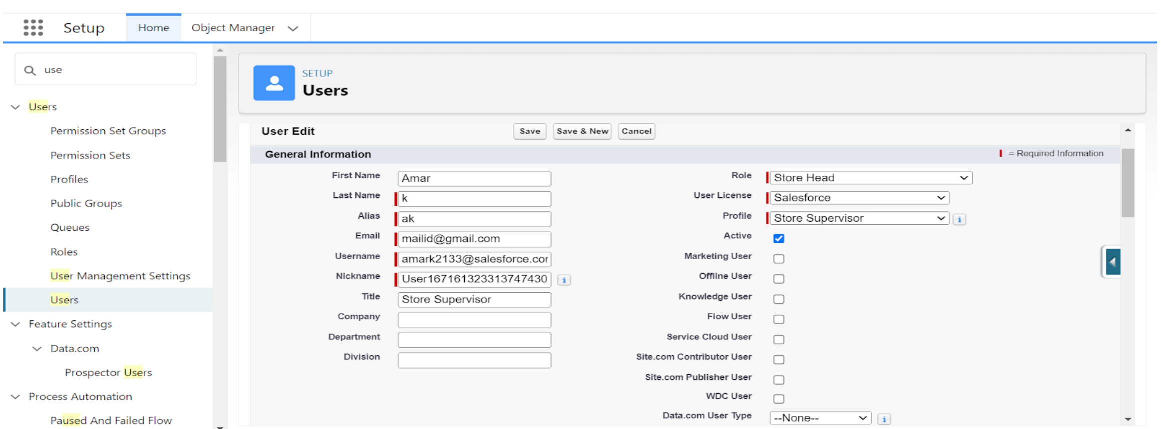




TASK-8: Creation of an User

• 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.



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.

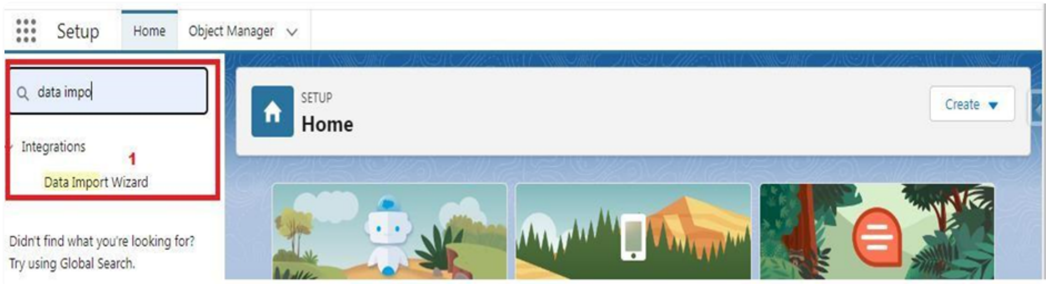
Click “Edit”: ▪ In the record’s detail view, click the “Edit” button to enable editing mode.

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

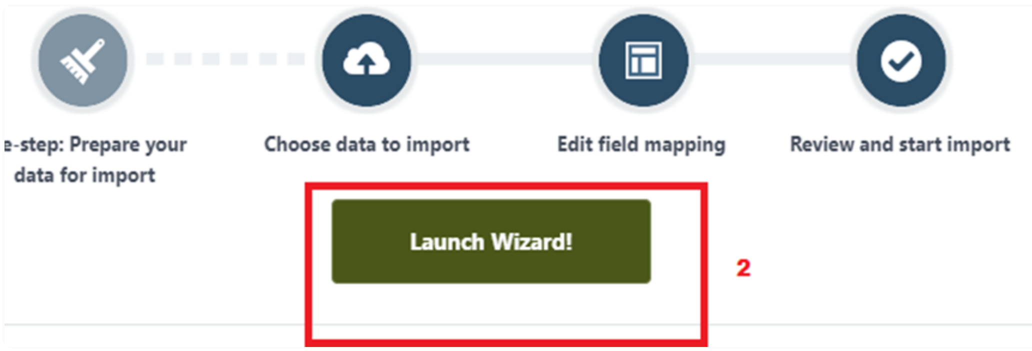
Save the Changes: ▪ After making the updates, click “Save” to apply and store the modifications. These steps ensure that records are properly created and updated, maintaining accurate and current data in Salesforce.

TASK-10:Importing Data

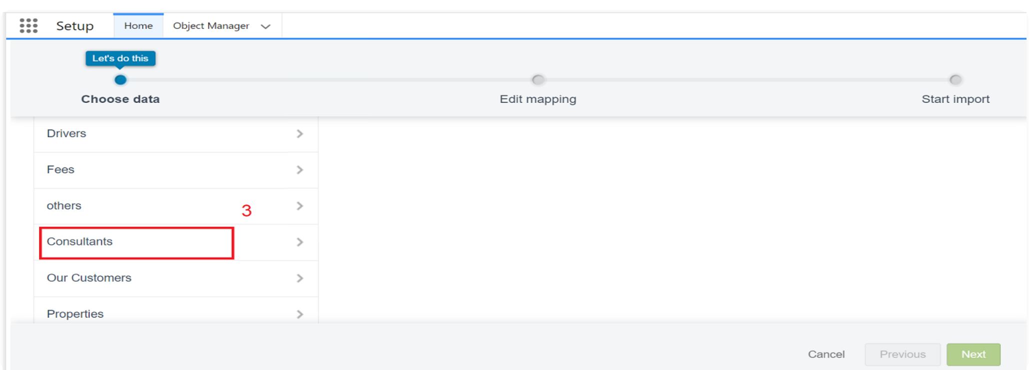
- From Setup, click the Home tab.
- In the Quick Find box, enter Data Import and select Data Import Wizard



- Click Launch Wizard!



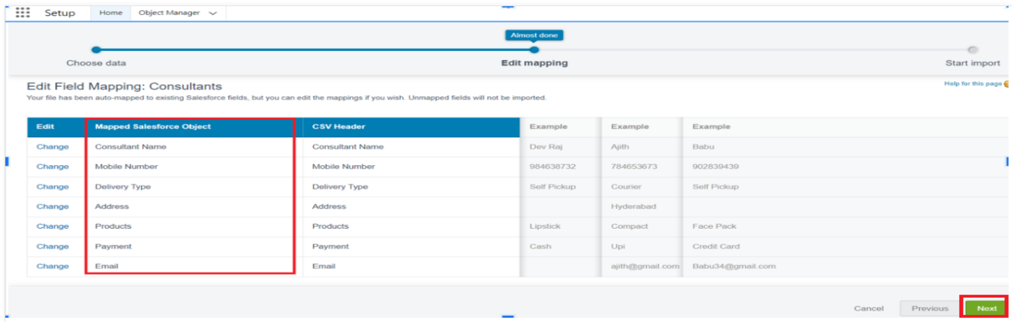
- Click the Custom Objects tab and select the Consultant object.



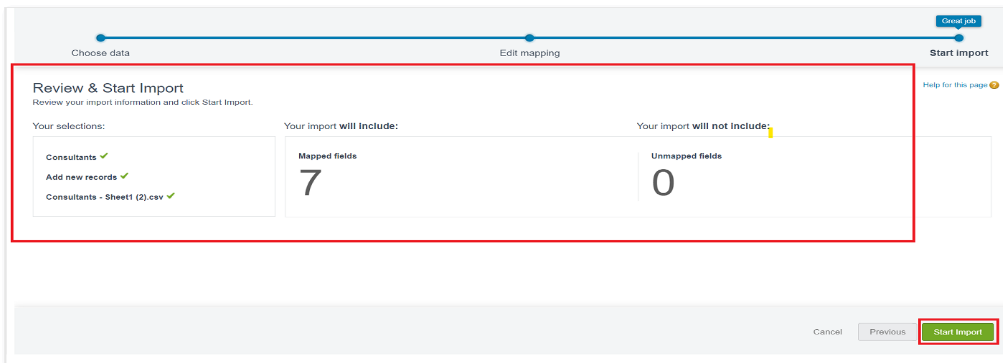
- Select Add new records.

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

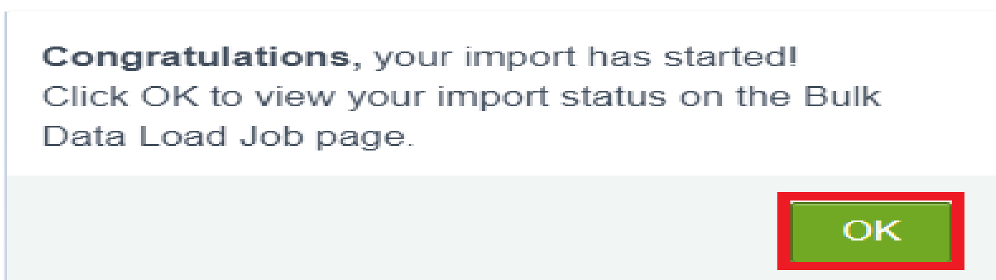
- Since the field names in the CSV file (CSV Header) are the same as the field names in your object (Mapped Salesforce Object), the fields are automatically mapped. Click Next.



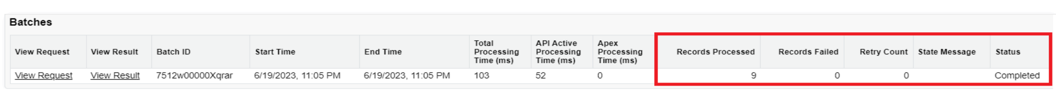
- The next screen gives you a summary of your data import. Click Start Import.



- Click OK on the popup.



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



- 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

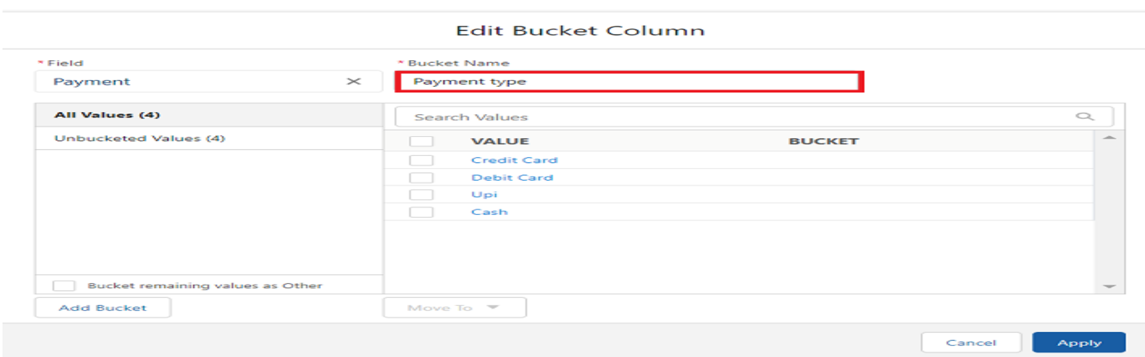
9.Click on Add Bucket and name it as NetBanking

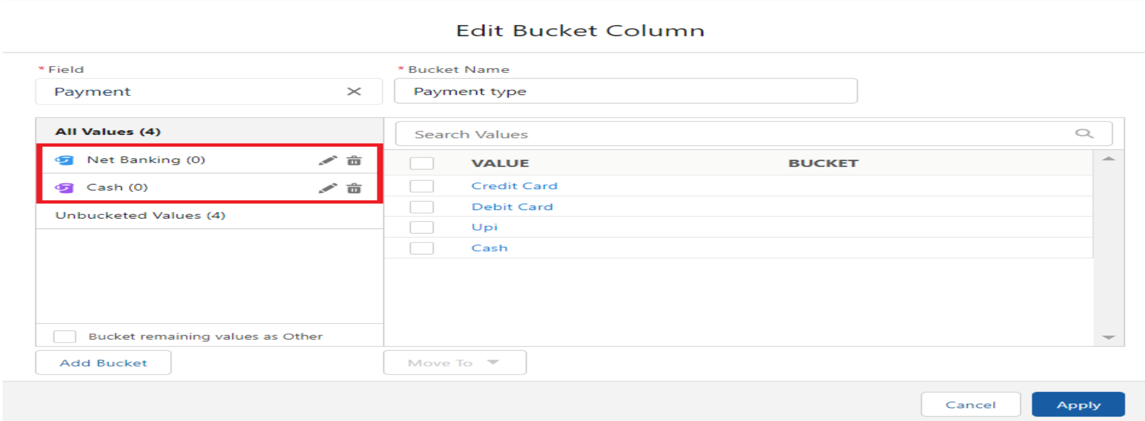
10.Click on Add Bucket and name it as Cash

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.





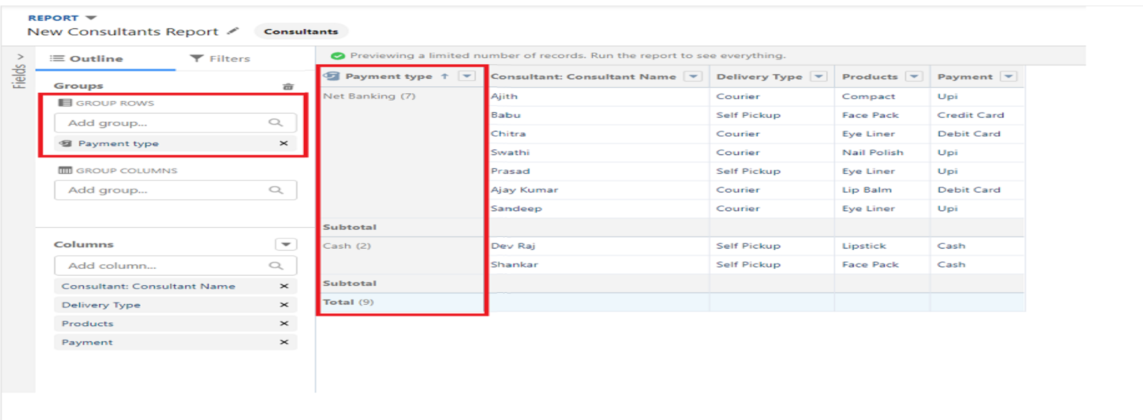
14.In Group Rows Add Payment Type Bucket Field.

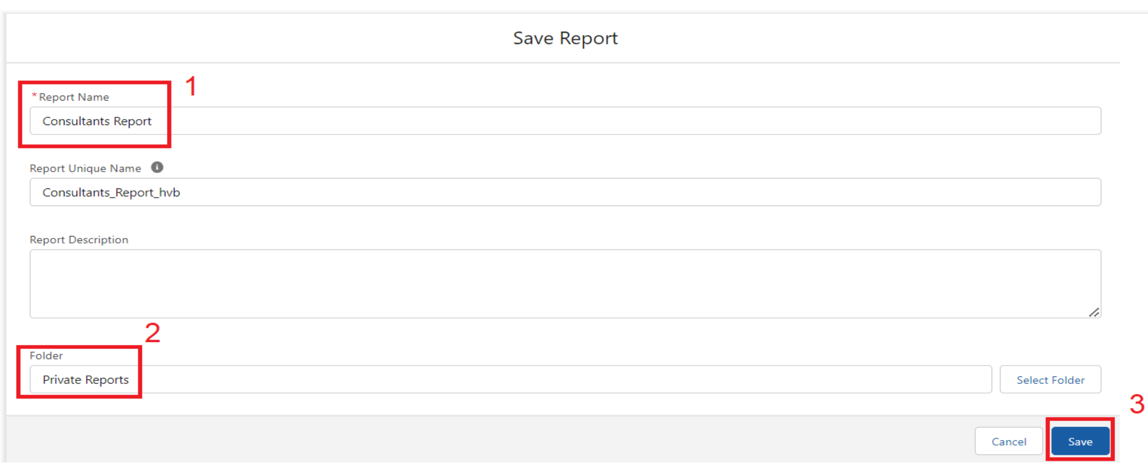
15.Click refresh

16.Click Save and Run

17.Give report name – Consultant report

18.Click Save





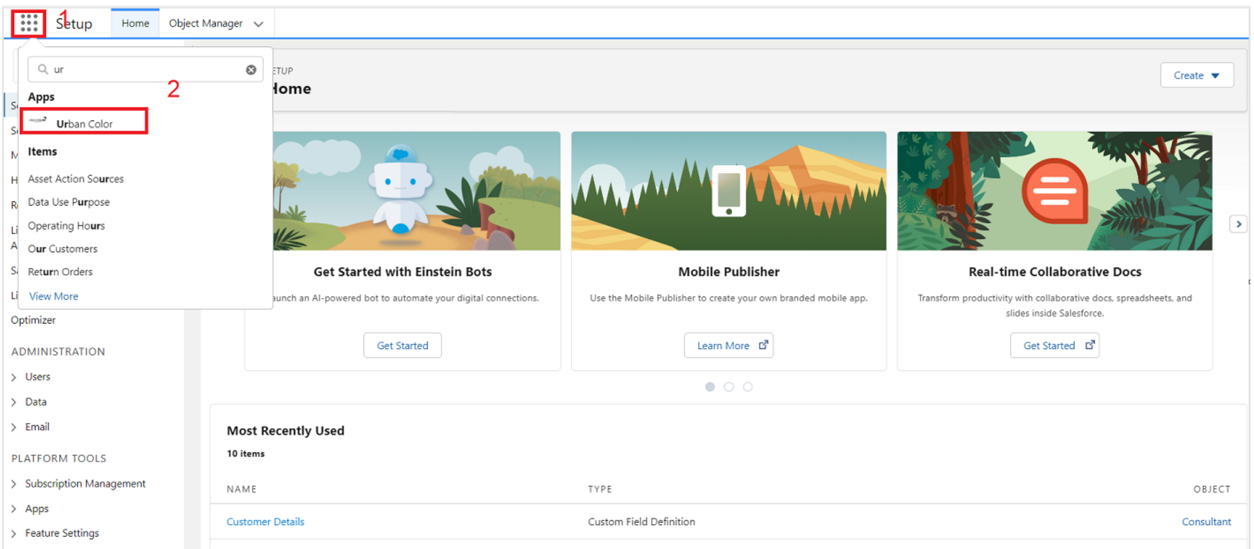
View Reports :

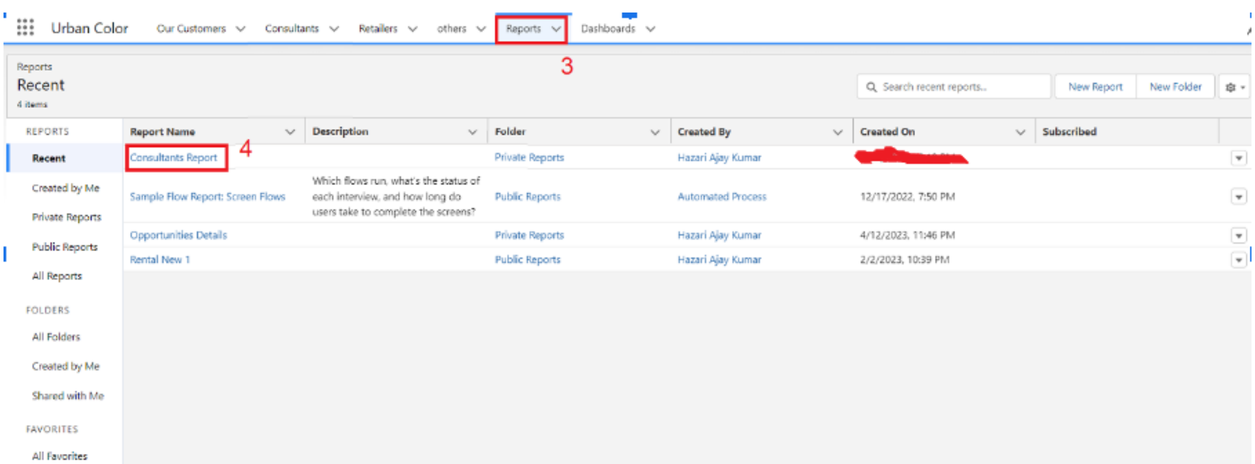
Click on App Launcher on the left side of the screen.

Search Urban Color App & click on it.

Click on Reports Tab.

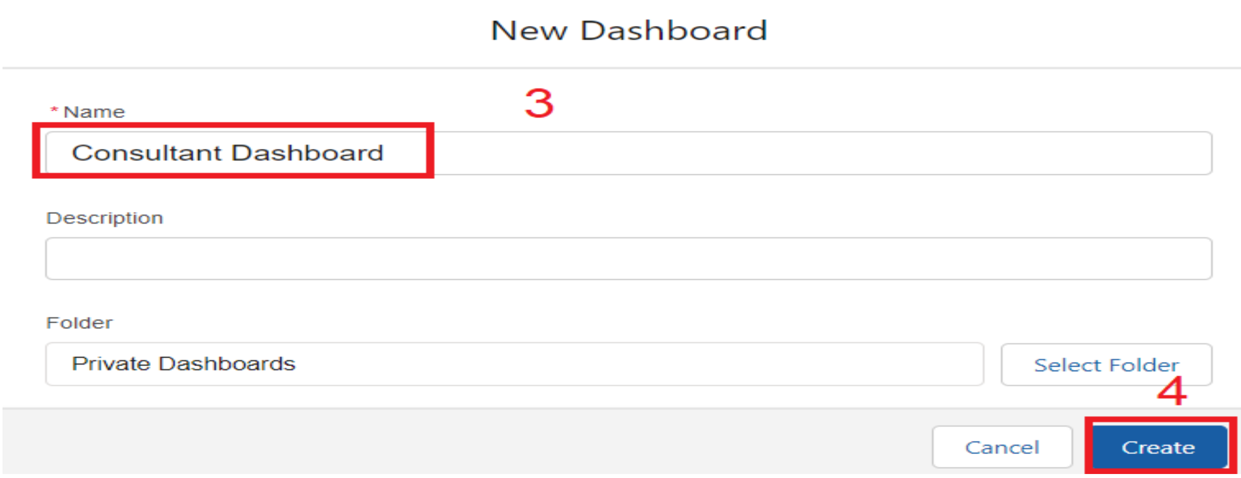
Click on Urban Color Report and see records

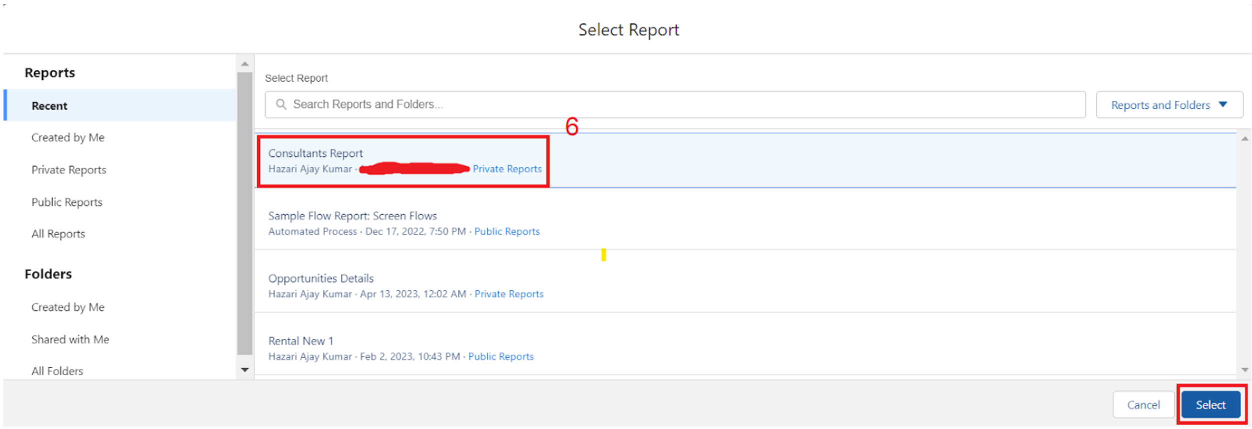


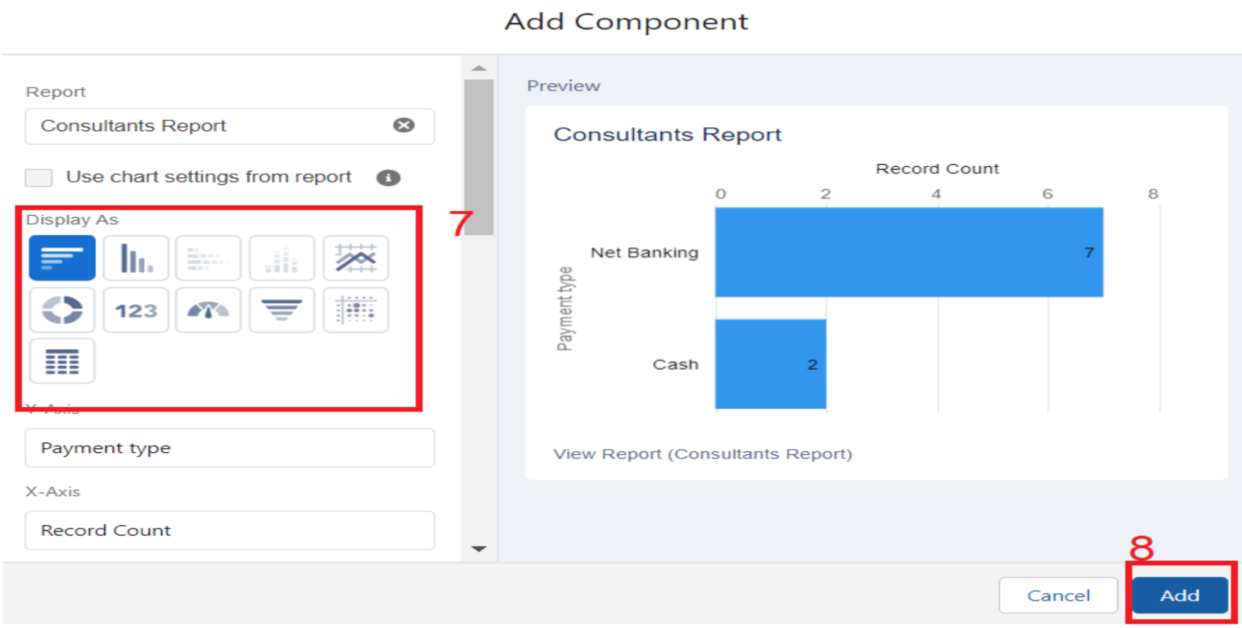


Task 11 : Working with dashboards

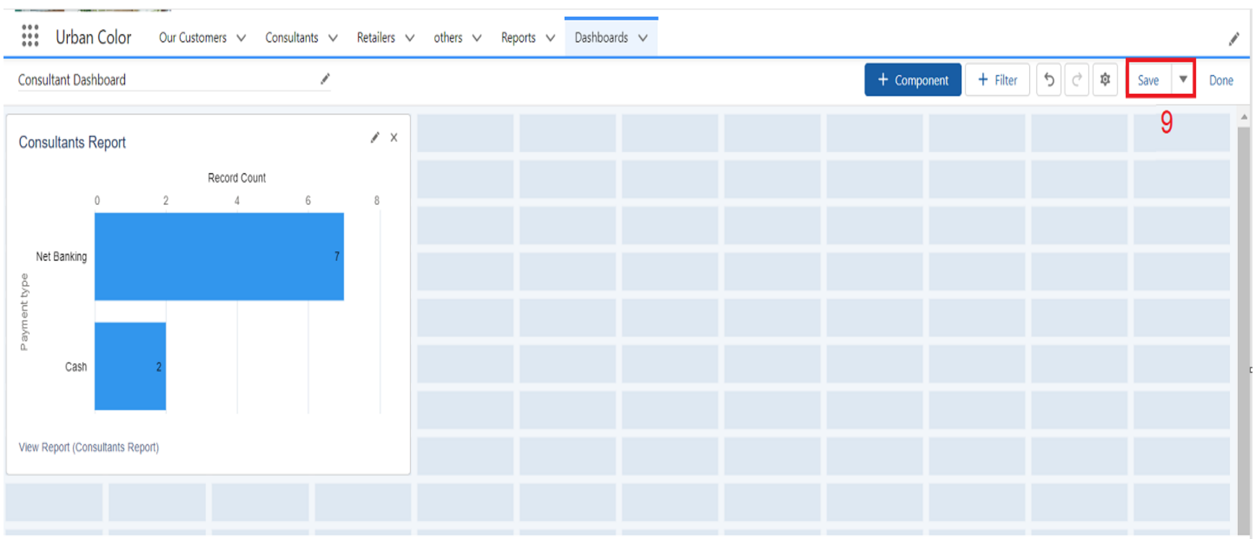
1. Click on the Dashboards tab from the Urban Color application.
2. Click on the new dashboard.
3. Give name- Consultant Dashboard
4. Click create
5. Give your dashboard a name and click on +component
6. Select the Consultants Report which you created.
7. For the data visualization select any of the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







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



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

View Dashboard :

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