

**MUTHURANGAM GOVT ARTS AND SCIENCE COLLEGE  
VELLORE**

**RETAIL MANAGEMENT APPLICATION USING SALESFORCE**

PROJECT SUBMITTED BY

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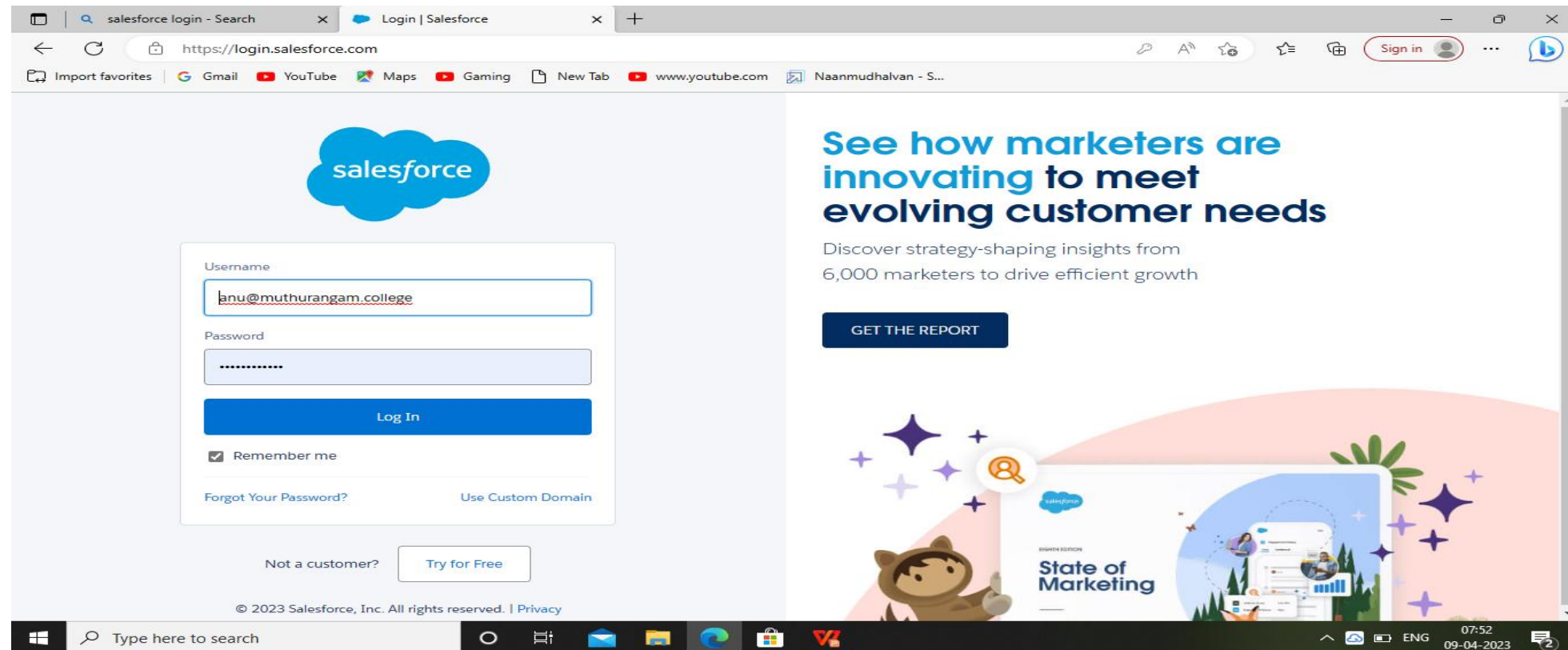
Creation of dashboard

## MILESTONE 1

creations of developer account

1. Go to developers.salesforce.com
2. Click on sign up
3. Enter the newly created user name and password

Fig 1



## ACCOUNT ACTIVATION

Go to the inbox of the email that you used while signing up.click on the verify account to activate your account,the email may take 5 to 10 min

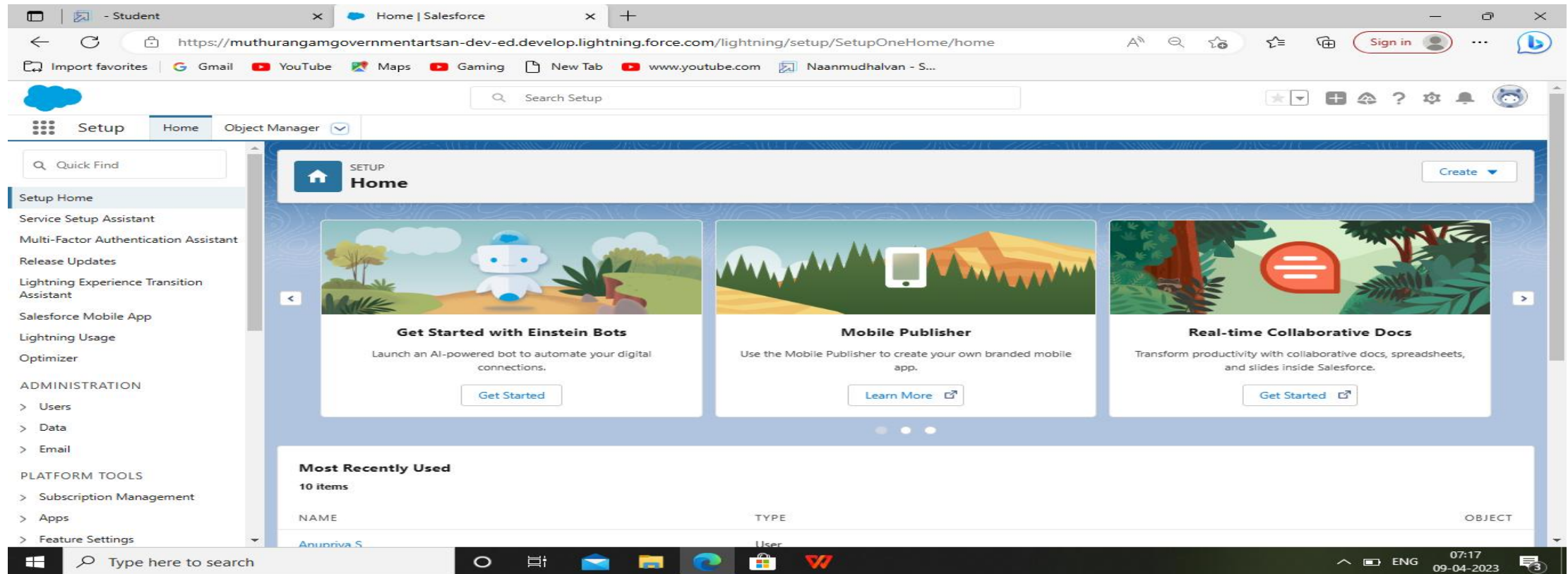
.Fig 2



# ACCOUNT ACTIVATION

After activating account , the home page of the salesforce is in fig 3

Fig 3



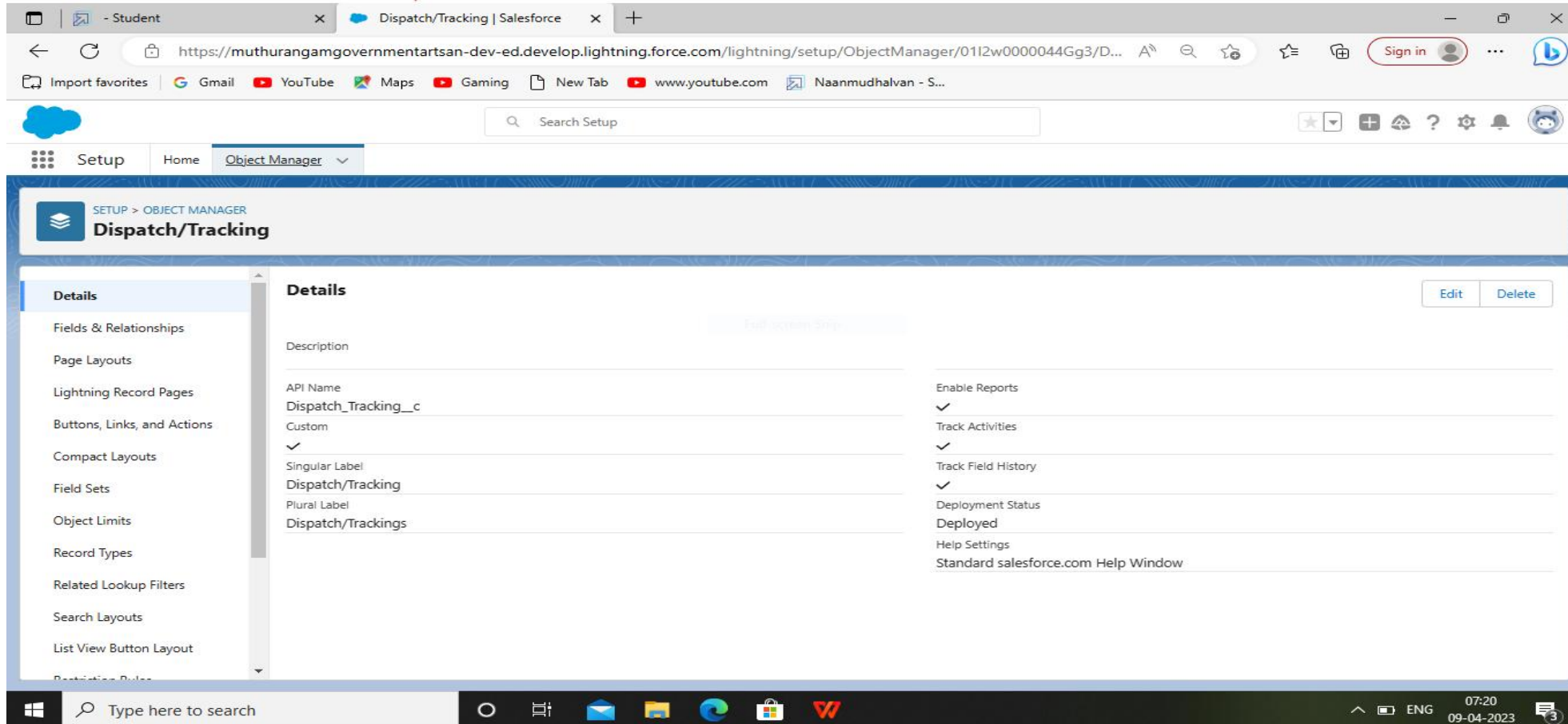
## Milestone-2 OBJECT

Creation of object dispatch/tracking

Navigate custom object and edit the object name

The screenshot shows the Salesforce 'New Custom Object' setup page in a web browser. The browser's address bar displays the URL: `https://muthurangamgovernmentartsan-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new`. The page title is 'New Custom Object'. A yellow banner at the top states: 'Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)'. Below this is the 'Custom Object Definition Edit' section with buttons for 'Save', 'Save & New', and 'Cancel'. The 'Custom Object Information' section includes fields for 'Label' (with example 'Account'), 'Plural Label' (with example 'Accounts'), 'Starts with vowel sound' (checkbox), 'Object Name' (with example 'Account'), and a 'Description' text area. At the bottom, there are radio buttons for 'Context-Sensitive Help Setting' (selected: 'Open the standard Salesforce.com Help & Training window') and a 'Content Name' dropdown menu set to 'None'.

## Creation of field of dispatch and tracking



The screenshot shows the Salesforce Object Manager interface for a custom object named "Dispatch/Tracking". The browser address bar indicates the URL: `https://muthurangamgovernmentartsan-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w0000044Gg3/D...`. The page title is "SETUP > OBJECT MANAGER Dispatch/Tracking".

The left sidebar contains a navigation menu with the following items:

- Details
- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules

The main content area is titled "Details" and includes a "Full screen tips" button. It displays the following configuration details:

Field	Value
Description	
API Name	Dispatch_Tracking__c
Custom	✓
Singular Label	Dispatch/Tracking
Plural Label	Dispatch/Trackings
Enable Reports	✓
Track Activities	✓
Track Field History	✓
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Buttons for "Edit" and "Delete" are located in the top right corner of the details section. The Windows taskbar at the bottom shows the time as 07:20 on 09-04-2023.



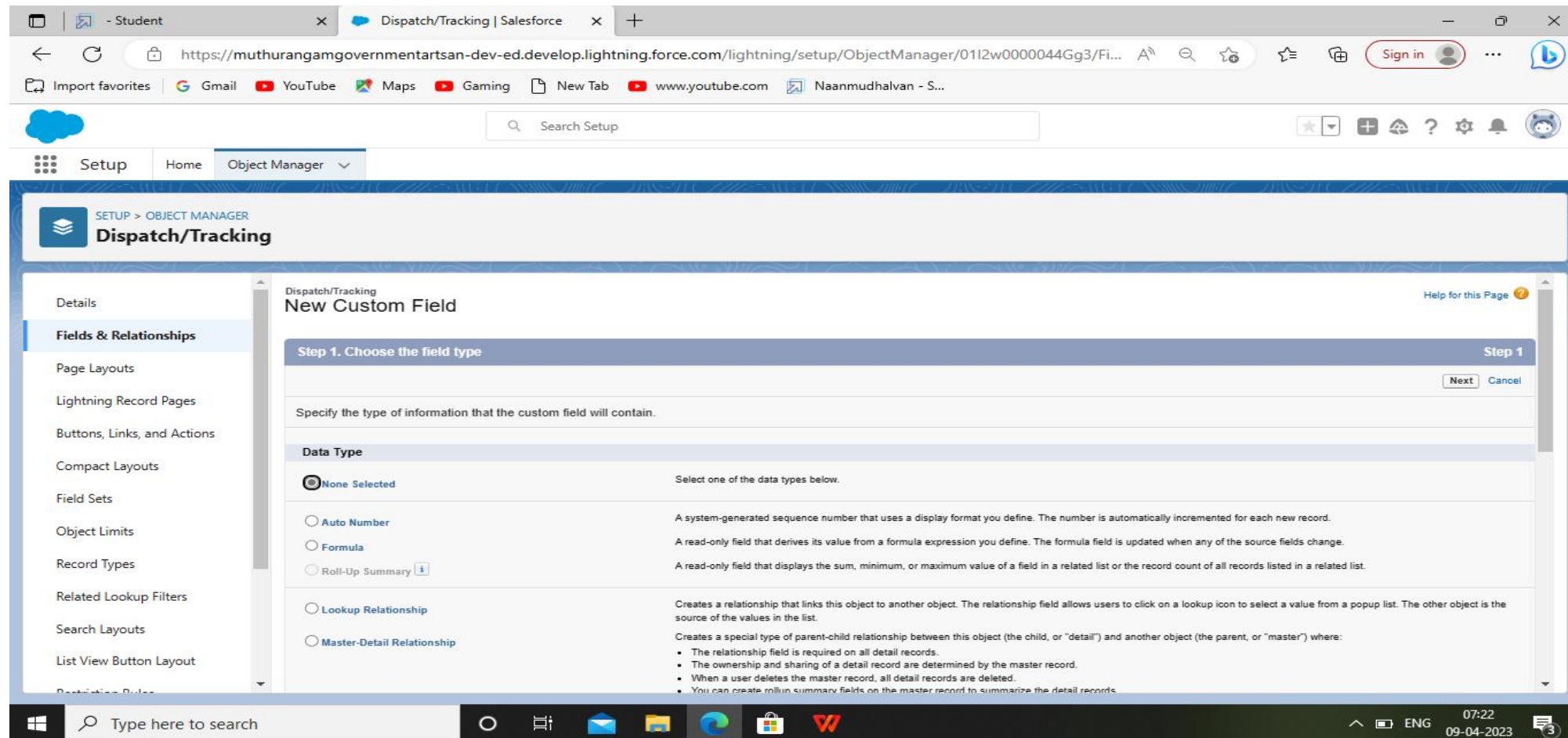
1. Select your object from object selection has dispatch/tracking
2. And select the option fields and relationship.
3. At the top right side you can find a new select that option
4. Now you have to select data type, checkbox has datatype
5. It give the label name as dispatched

The screenshot shows the Salesforce Object Manager interface for the 'Dispatch/Tracking' object. The left sidebar contains a navigation menu with options like 'Details', 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', 'Record Types', 'Related Lookup Filters', 'Search Layouts', and 'List View Button Layout'. The 'Fields & Relationships' section is selected, showing a table of 8 items sorted by Field Label. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are: Created By (CreatedById, Lookup(User)), Dispatch/Tracking Name (Name, Text(80)), Dispatched (Dispatched\_\_c, Checkbox), Expected date of delivery (Expected\_date\_of\_delivery\_\_c, Checkbox), Last Modified By (LastModifiedById, Lookup(User)), sale (sale\_\_c, Master-Detail(sale)), Sales order (Sales\_order\_\_c, Checkbox), and Tracking Id (Tracking\_Id\_\_c, Checkbox).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Dispatch/Tracking Name	Name	Text(80)		✓
Dispatched	Dispatched__c	Checkbox		
Expected date of delivery	Expected_date_of_delivery__c	Checkbox		
Last Modified By	LastModifiedById	Lookup(User)		
sale	sale__c	Master-Detail(sale)		✓
Sales order	Sales_order__c	Checkbox		
Tracking Id	Tracking_Id__c	Checkbox		

## Milestone 3: Relationship between objects

1. Go to the setup option from the home page and click on it
2. Go to the object manager and select dispatch/tracking object from the list
3. And select fields and relationships and click on new



4. Select the data type as master detail relationship
5. And select related to the object as sales order, and click on next
6. You will navigate to the label name page where you give the label name for the field , give it has sales order and click next

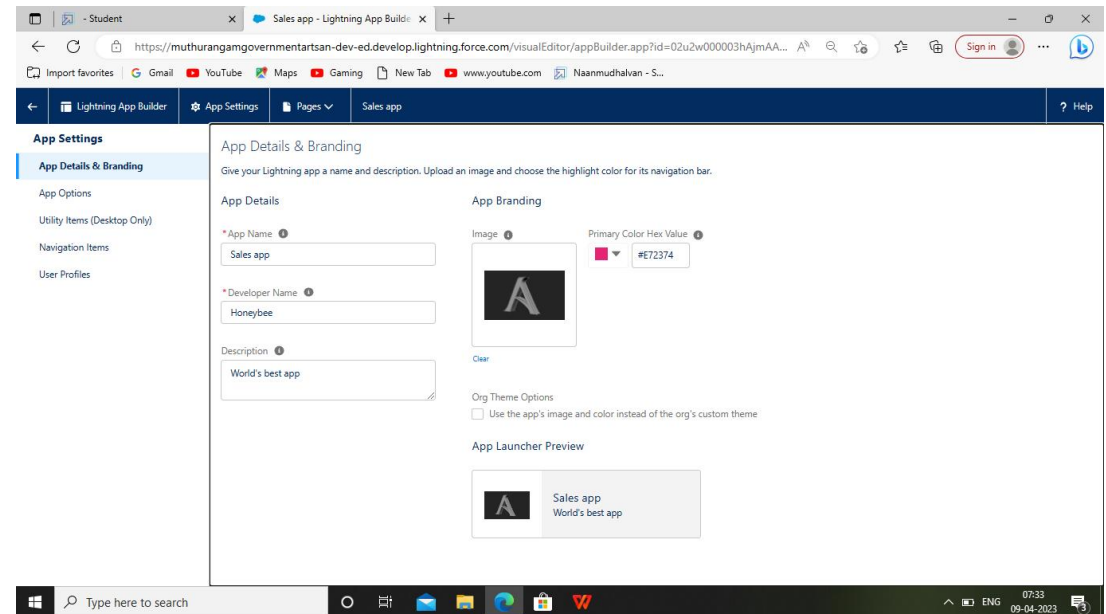
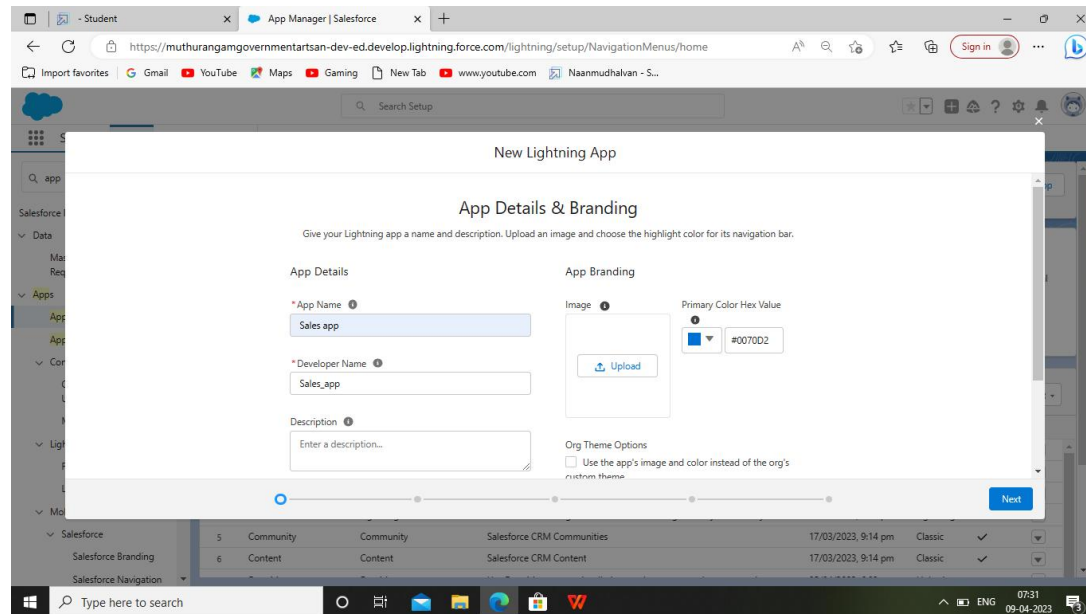
The screenshot displays the Salesforce Setup interface for the 'Dispatch/Tracking' object. The page is titled 'Edit Dispatch/Tracking Custom Field sale'. The 'Field Information' section shows the following details:

- Field Label: Sales\_order
- Field Name: Sales\_order
- Description: (Empty text box)
- Help Text: (Empty text box)
- Data Owner: User
- Field Usage: --None--
- Data Sensitivity Level: --None--
- Compliance Categorization: Available (PII, HIPAA, GDPR, PCI) and Chosen (Empty list)

The left sidebar shows the navigation menu with 'Fields & Relationships' selected. The top navigation bar shows 'Setup > OBJECT MANAGER' and 'Dispatch/Tracking'.

# Milestone-4 APPLICATION

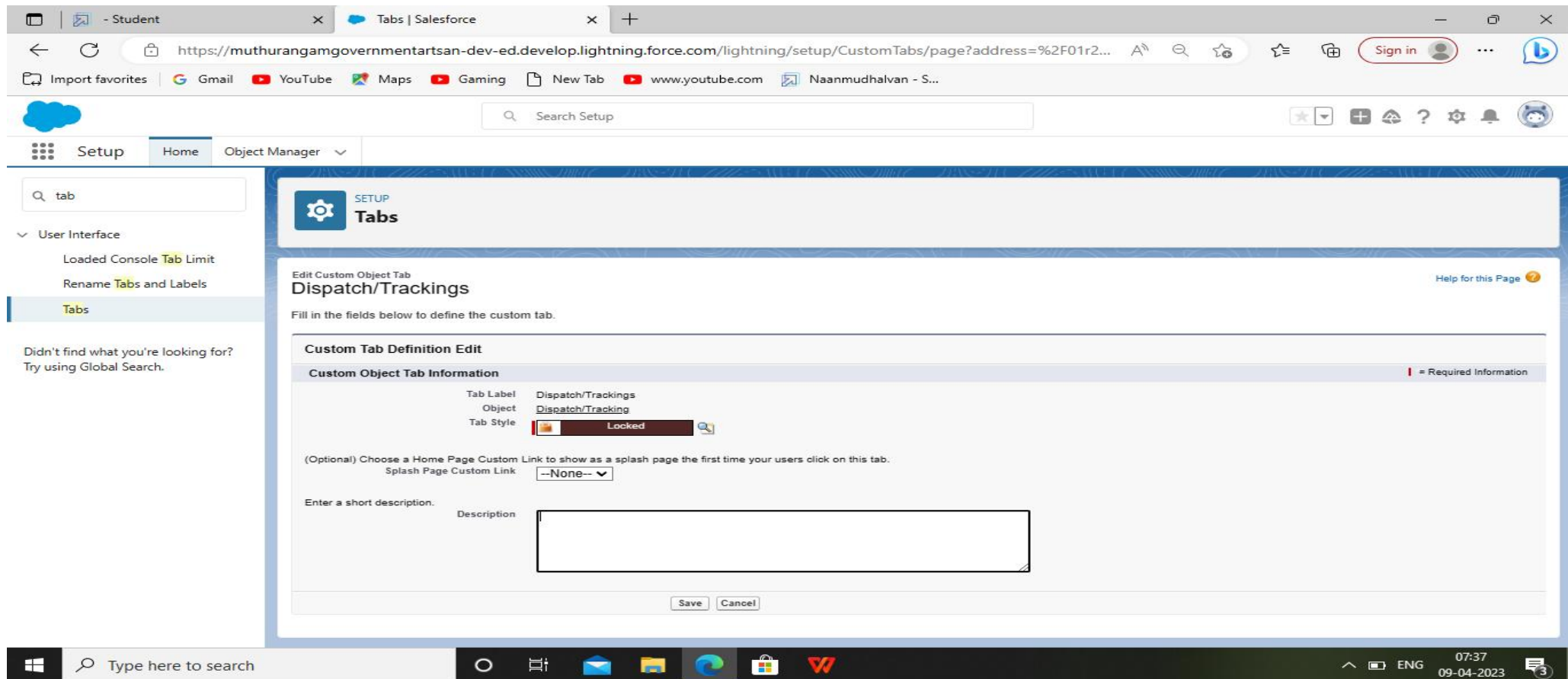
1. Creation of application by selecting an option for new lightning app
2. Upload the picture and choose the navigation style



## Milestone-5:Layout

### Creation of custom tabs

- 1 .Click the Home tab, Enter tabs in quick find and select tabs
- 2 ,Under custom object tabs click new
3. For object select warehouse
- 4 .For tab style select any icon





## Milestone-6: Users

### Creations of users

The screenshot displays the Salesforce 'Users' management interface. The left sidebar shows the navigation menu with 'Users' selected. The main content area is titled 'User Edit' and shows the details for a user named 'Anupriya S'. The form is divided into two main sections: 'General Information' and 'User License'. The 'General Information' section includes fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. The 'User License' section includes fields for Role, User License, Profile, 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, and Data.com Monthly Addition Limit. The 'Role' field is set to '<None Specified>'. The 'User License' field is set to 'Salesforce'. The 'Profile' field is set to 'System Administrator'. The 'Active' checkbox is checked. The 'Marketing User' checkbox is checked. The 'Offline User' checkbox is checked. The 'Knowledge User' checkbox is unchecked. The 'Flow User' checkbox is unchecked. The 'Service Cloud User' checkbox is checked. The 'Site.com Contributor User' checkbox is unchecked. The 'Site.com Publisher User' checkbox is unchecked. The 'WDC User' checkbox is unchecked. The 'Data.com User Type' field is set to '--None--'. The 'Data.com Monthly Addition Limit' field is set to '300'. The 'Save' button is visible at the top of the form.

Browser tabs: - Student, Users | Salesforce

URL: <https://muthurangamgovernmentartsan-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005...>

Search Setup

Setup Home Object Manager

user

Users

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users

Feature Settings

- Data.com
- Prospector Users

User Interface

- Action Link Templates
- Actions & Recommendations
- App Menu
- Custom Labels

User Edit

Anupriya S

Save Save & New Cancel

General Information

First Name: Anupriya

Last Name: S

Alias: Apriy

Email: anusaravanakumar2002@

Username: anu@muthurangam.college

Nickname: anu

Title:

Company: muthurangam government

Department: physics

Division: electronics

Role: <None Specified>

User License: Salesforce

Profile: System Administrator

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

Type here to search

07:39 09-04-2023

## Milestone-7: validation rules

### creation of validation rule and cross object formula

The screenshot displays the Salesforce Setup interface for the 'Dispatch/Tracking' object. The left sidebar lists various setup options, including Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Validation Rules. The main content area is titled 'Dispatch/Tracking Validation Rule' and includes a 'Validation Rule Edit' section with fields for Rule Name (set to 'Account'), Active status (checked), and Description. Below this is the 'Error Condition Formula' section, which contains an example formula and a text area for the user-defined formula. The formula text area shows the formula: `LEFT( $User.Phone , 1) <> "+"`. A 'Functions' dropdown menu is open, showing a list of functions including ABS, ACOS, ADDMONTHS, AND, ASCII, and ASIN. The bottom of the screen shows the Windows taskbar with the search bar and various application icons.

Dispatch/Tracking Validation Rule

Define a validation rule by specifying an error condition and a corresponding error message. The error condition is written as a Boolean formula expression that returns true or false. When the formula expression returns true, the save will be aborted and the error message will be displayed. The user can correct the error and try again.

**Validation Rule Edit** [Save] [Save & New] [Cancel]

Rule Name:

Active: ☒

Description:

**Error Condition Formula** [More Examples...]

Example: `Discount_Percent__c > 0.30`  
Display an error if Discount is more than 30%  
If this formula expression is true, display the text defined in the Error Message area

[Insert Field] [Insert Operator]

`LEFT( $User.Phone , 1) <> "+"`

**Functions**  
-- All Function Categories --  
ABS  
ACOS  
ADDMONTHS  
AND  
ASCII  
ASIN  
[Insert Selected Function]  
ABS(number)

Quick Tips  
• [Operators & Functions](#)

! = Required Information

# Milestone -8: Reports

## Creation of report

1. Click on the app launcher and search for reports
2. select new report for the record type category select other reports
3. Give the label name products with stock availability
4. Click on save and run for saving the report

The screenshot shows the Salesforce Report Builder interface. The report is titled "Product with stock availability" and is based on the "Accounts" object. The report is in preview mode, displaying a table of record counts by industry and ownership, a donut chart showing a total of 13 records, and a details table for the first 13 rows.

**Report Summary:**

Industry	Ownership	Public	Private	Other	Total
-	Record Count	2	0	0	2
Apparel	Record Count	0	1	0	1
Biotechnology	Record Count	0	0	1	1
Construction	Record Count	0	1	0	1
Consulting	Record Count	0	0	1	1
Education	Record Count	0	0	1	1
Electronics	Record Count	0	1	0	1

**Details (13 Rows):**

Last Activity	Billing State/Province	Type	Rating	Last Modified Date	Account Name
-	CA	-	-	17/03/2023	sForce
-	-	-	-	17/03/2023	Sample Account for Entitlements
-	NC	Customer - Direct	Warm	17/03/2023	Burlington Textiles Corp of America
-	CA	Customer - Channel	Cold	17/03/2023	GenePoint



## Milestone-9: Dashboard

### Creation of dashboard

1. Ensure that value is record count and sliced by product name
2. Leave the default value
3. Click on add
4. And save the dashboard

The screenshot shows the Salesforce Lightning Developer interface. The browser address bar indicates the URL: <https://muthurangamgovernmentartsan-dev-ed.develop.lightning.force.com/lightning/r/Dashboard/01Z2w000000006IWEAS/view?...>. The dashboard is titled 'products with stock availability'. The 'Add Component' dialog is open, showing the 'Report' section with 'Product with stock availability' selected. The 'Display As' section shows a donut chart icon selected, with a value of 123. The 'Value' section has 'Record Count' selected. The 'Preview' section shows a donut chart titled 'Product with stock availability' with a total record count of 13, broken down by industry: Apparel (2), Biotechnology (1), Construction (1), Consulting (1), and Education (1). The background shows the dashboard grid with a similar chart.

Industry	Record Count
Apparel	2
Biotechnology	1
Construction	1
Consulting	1
Education	1
<b>Total</b>	<b>13</b>

Trail head url

Team leader:

<https://trailblazer.me/id/apriya202>

# END

OUR SINCERE GRATITUDE TO

➤ **SALESFORCE**

➤ **SMARTBRIDGE(SMART  
INTERNZ)**