

Project Report Template

RETAIL MANAGEMENT APPLICATION USING SALESFORCE

1.Introduction

1.1 Overview

- ✚ First, we had finished empathy map and ideation and brainstorming and submit it on GitHub.
- ✚ We had created account in salesforce. then we create objects, tabs, application, field, validation rules, user and reports, dashboard.

✚ **Object creation**

We Click on the gear icon and Click on the object manager tab and Find a Create Dropdown click on that and select Custom Object.

✚ **Application creation**

We enter App Manager in the quick Find and select App Manager and Under app options, we leave the default selections and click next and Under Utility Items, we leave as is and click next and from Available Items, select Account , contacts, opportunities, leads, warehouse, dispatch tracking, campaign and move them to selected Items and we click next and from available Profiles, we select System Administrator and move it to selected profiles and we click save & finish.

✚ **Field creation**

We click the object manager tab next to select the dispatch/tracking and select fields & relationships from the left navigation, and click new and then select the data type and click new, new, and save. same procedure to we created the other fields expected data of delivery, tracking id, sales order, dispatched.

✚ **User creation**

We enter user in quick find box and select to continue to give the details.

✚ **Validation rules**

We click on object manager tab next to select the account object and in details select on the validation rules and click on new, give the label name and enter the formula and save it. Create the cross object.

✚ **Reports creation**

From the reports tab, we click new report and select the report type attendees with events for the report, and we click create and we include all fields, then save or run it.

✚ **Dashboard creation**

From the Dashboard tab, we click New Dashboard and select the products and stock availability report and select the create and add components, select the type of chart and click on add and save the dashboard.

1.2 Purpose

✚ Salesforce helps businesses keep track of customer interactions and sales data. It can manage leads, contacts, opportunities, and cases.

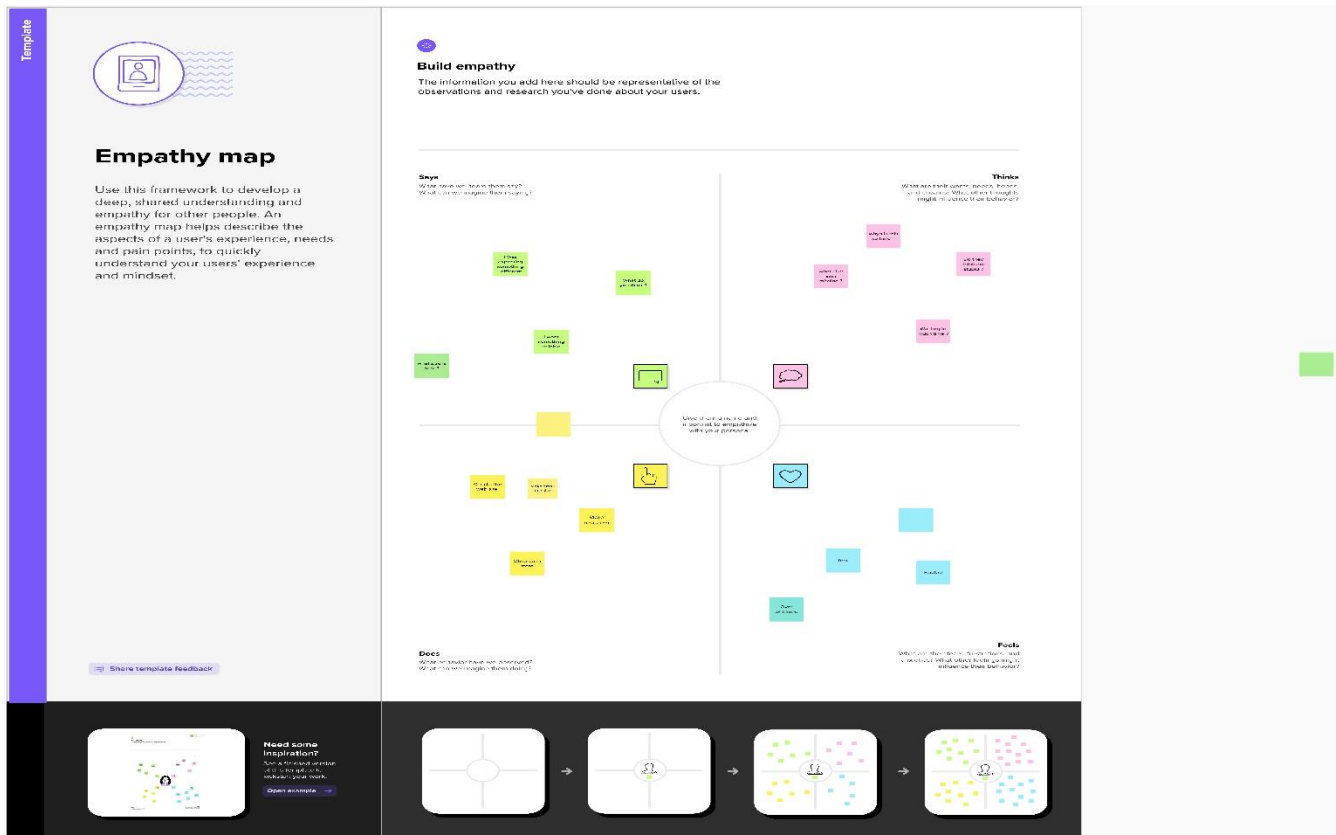
✚ Salesforce can be used to manage orders from retail stores and distributors, including tracking orders, processing payments, and managing inventory levels.

✚ **Increase Skills Used in Entrepreneurship**

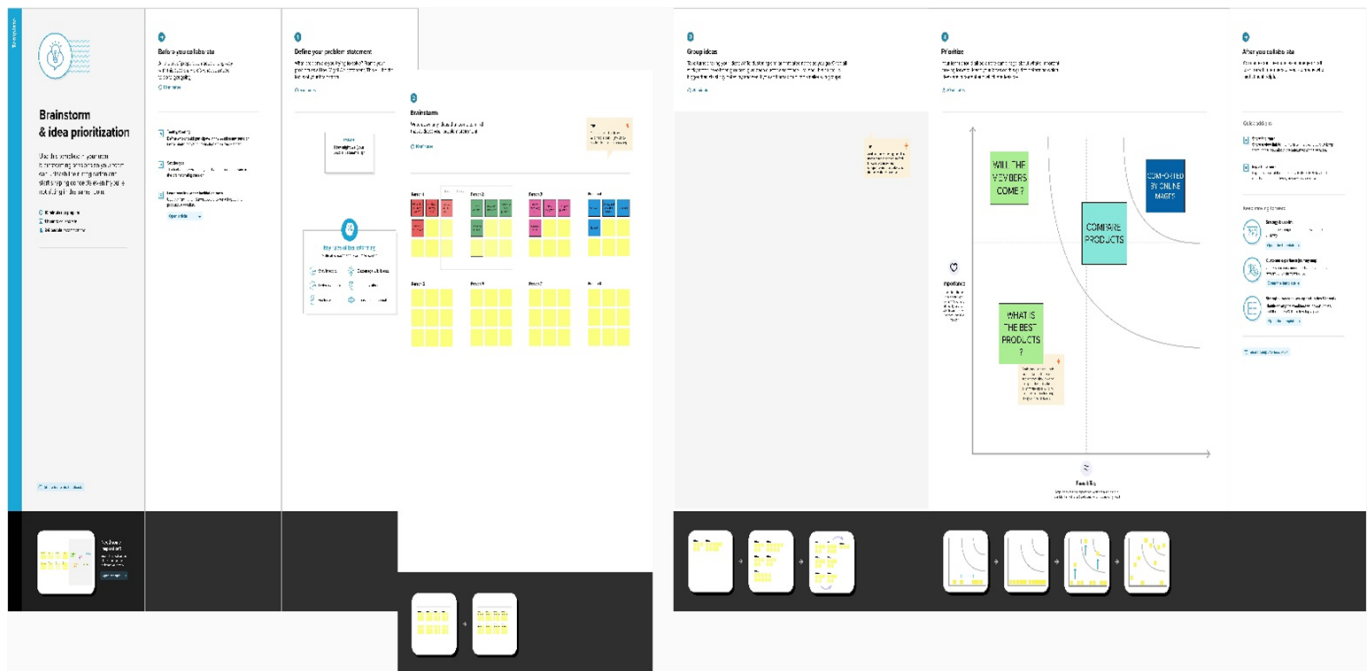
If you're interested in becoming an entrepreneur in the future, sales and marketing are likely to be two key pieces of your business. Knowing the different applications and uses Salesforce can have within your business can help you propel your company to success!

Problem definition & design thinking

Empathy map



2.2 Ideation & Brainstorming



3.Result

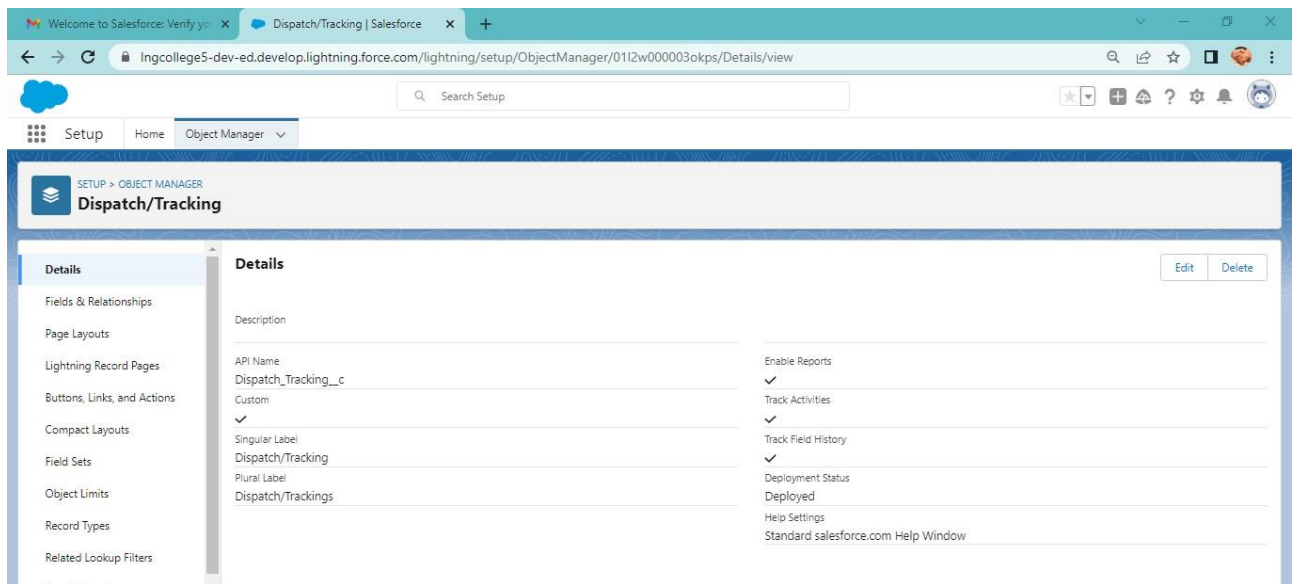
3.1 Data Model:

Object name	Field in the object	
Dispatch / Tracking	Field label	Data type
	Dispatched	Check box
	Expected date of delivery	Date
	Tracking id	Auto number
Warehouse	Field label	Data type
	Product name	Text
	Warehouse name	Text
	Stock availability	number

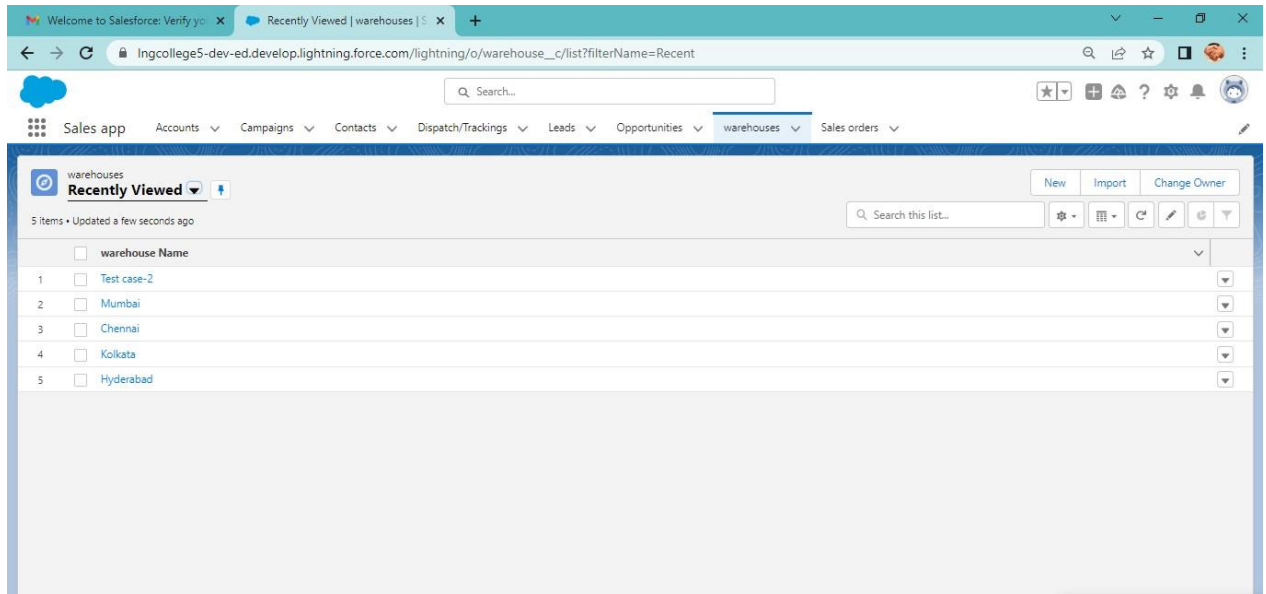
Master-details	Field label	Data type
	Sales order	Master-detail relationships

3.2 Activity and screenshot

OBJECT CREATION



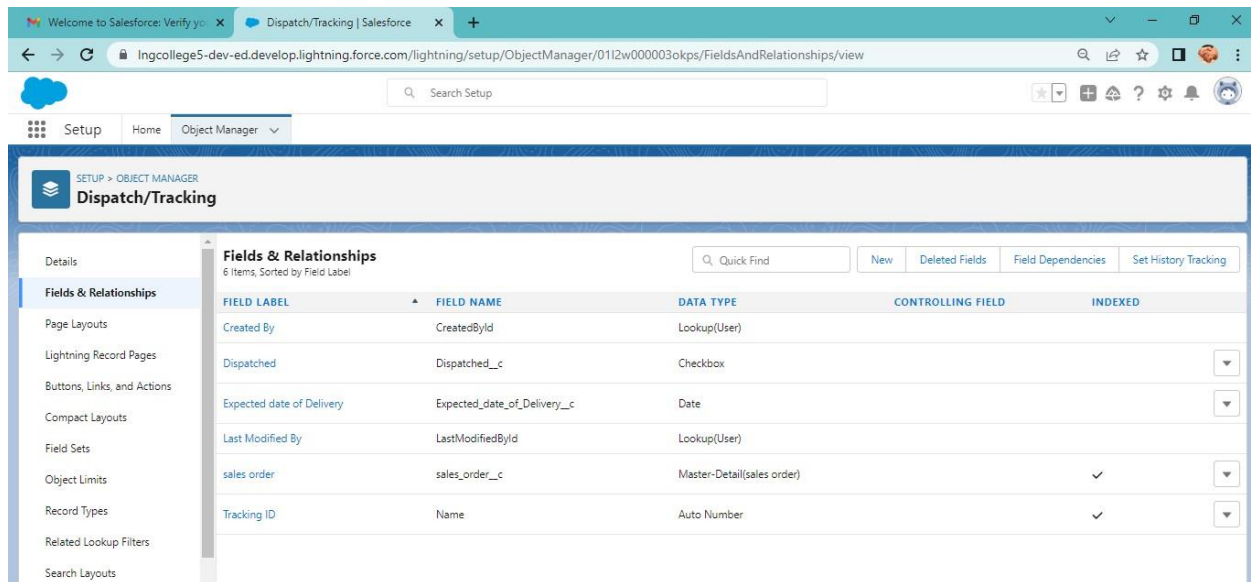
APPLICATION



This screenshot shows the Salesforce interface for the 'warehouses' object. The browser address bar indicates the URL: `ingcollege5-dev-ed.develop.lightning.force.com/lightning/o/warehouse__c/list?filterName=Recent`. The page header includes the Salesforce logo, a search bar, and navigation tabs for Sales app, Accounts, Campaigns, Contacts, Dispatch/Trackings, Leads, Opportunities, warehouses (selected), and Sales orders. The main content area is titled 'warehouses' and 'Recently Viewed'. It displays a list of 5 items, updated a few seconds ago. The list has a search bar and action buttons (New, Import, Change Owner). The table below shows the list of warehouses.

	warehouse Name	
1	Test case-2	
2	Mumbai	
3	Chennai	
4	Kolkata	
5	Hyderabad	

FILED CREATION



This screenshot shows the Salesforce Setup interface for the 'Dispatch/Tracking' object. The browser address bar indicates the URL: `ingcollege5-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003okps/FieldsAndRelationships/view`. The page header includes the Salesforce logo, a search bar, and navigation tabs for Setup, Home, and Object Manager. The main content area is titled 'SETUP > OBJECT MANAGER Dispatch/Tracking'. It displays a list of 6 items, sorted by Field Label. The table below shows the list of fields and relationships.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Dispatched	Dispatched__c	Checkbox		
Expected date of Delivery	Expected_date_of_Delivery__c	Date		
Last Modified By	LastModifiedById	Lookup(User)		
sales order	sales_order__c	Master-Detail(sales order)		✓
Tracking ID	Name	Auto Number		✓

USER CREATION

The screenshot shows the Salesforce Setup interface for managing users. The left sidebar contains a navigation menu with options like Setup, Home, Object Manager, and Users. The main content area is titled 'All Users' and provides instructions on how to create, view, and manage users. It includes a table of existing users with columns for Action, Full Name, Alias, Username, Role, Active status, and Profile. The table lists four users: Chatter_Edward, S_Subiksha, User_Integration, and User_Security. Each user has an 'Edit' link and a checkbox for selection. The 'Active' column shows checkmarks for all listed users. The 'Profile' column lists the roles: Chatter Free User, System Administrator, Analytics Cloud Integration User, and Analytics Cloud Security User. At the bottom of the table, there are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter_Edward	Chatter	chatter0062w00000r0d0ca@labcseu4f0d@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	S_Subiksha	SS	subikshasuresh@trago.com		✓	System Administrator
<input type="checkbox"/> Edit	User_Integration	integ	integration0062w00000r040ca@l.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity0062w00000r0d0ca@l.com		✓	Analytics Cloud Security User

VALIDATION RULES

The screenshot shows the Salesforce Setup interface for managing validation rules. The left sidebar contains a navigation menu with options like Setup, Home, Object Manager, and Account. The main content area is titled 'Validation Rules' and shows a list of validation rules. The table has columns for Rule Name, Error Location, Error Message, Active status, and Modified By. The table lists one validation rule: 'phone_number_has_international_format'. The 'Error Location' is 'Phone', the 'Error Message' is 'Phone number must begin with +(country code)', the 'Active' status is checked, and the 'Modified By' is Subiksha S. The 'Modified By' column also shows the date and time: 02/04/2023, 8:19 am. At the bottom of the table, there is a 'New' button.

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
phone_number_has_international_format	Phone	Phone number must begin with +(country code)	✓	Subiksha S, 02/04/2023, 8:19 am

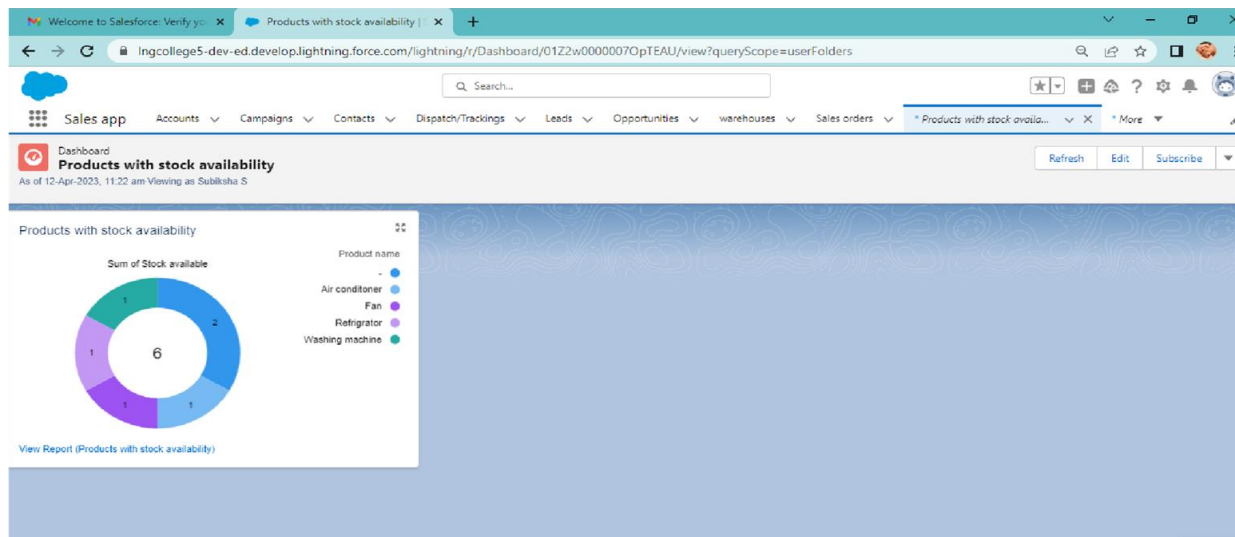
REPORT CREATION

The screenshot shows a Salesforce report titled "Products with stock availability" under the "warehouses" folder. The report displays a table with 5 records and a total stock available of 6. The table columns are Product name, warehouse: warehouse Name, and Stock available. The data is as follows:

Product name	warehouse: warehouse Name	Stock available
- (1)	Test case-2	2
Subtotal		2
Air conditioner (1)	Hyderabad	1
Subtotal		1
Fan (1)	Kolkata	1
Subtotal		1
Refrigerator (1)	Chennai	1
Subtotal		1
Washing machine (1)	Mumbai	1
Subtotal		1
Total (5)		6

At the bottom of the report, there are toggle switches for Row Counts, Detail Rows, Subtotals, and Grand Total, all of which are currently turned on. An "On-Screen Keyboard" is visible in the bottom right corner.

DASHBOARD



4.Trailhead profile public URL

Team Leader - <https://trailblazer.me/id/bbalaraman>

Team member 1 - <https://trailblazer.me/id/dhad>

Team member 2 - <https://trailblazer.me/id/dineg18>

Team member 3 -

5. Advantages and disadvantages

Advantage of Retailers	Disadvantage of Retailers
<ul style="list-style-type: none">○ Requires less capital○ More profit margin than wholesales○ Better customer relation○ Credit facility○ No liability towards the buyers	<ul style="list-style-type: none">○ Require more marketing costs○ Good selling skills is required○ High competition○ No benefit of bulk buying

6. Applications

- ✚ Salesforce provides users comprehensive tools to manage customer data, automate processes, analyze data and insights, and create personalized customer experiences. Salesforce also offers a variety of solutions for customer service, marketing automation, commerce, app development, and more.
- ✚ Salesforce can be used to manage orders from retail stores and distributors, including tracking orders, processing payments, and managing inventory levels. This can help field sales teams ensure that orders are fulfilled quickly and accurately and that inventory levels are maintained at optimal levels.

7. Conclusion

- ✚ Salesforce helps businesses keep track of customer interactions and sales data. It can manage leads, contacts, opportunities, and cases. Salesforce also offers several features to help businesses automate their sales and marketing processes, such as email marketing, lead capture, and lead scoring.
- ✚ Retail management refers to the process of helping customers find products in your store. It includes everything from increasing your customer pool to how products are presented, and how you fulfill a customer's needs. A good store manager helps customers leave the store with a smile.

8.Future scope

- ✚ The future of Salesforce looks bright as the demand for Salesforce professionals continues to grow. With the increasing adoption of cloud technology and the growth of customer relationship management (CRM) systems, there will be a growing need for Salesforce expertise in the coming years.