Dr KALAIGNAR GOVERNMENT ARTS COLLEGE

KULITHALAI -639120

DEPARTMENT OF PHYSICS

NAAN MUDHALVAN – SMART BRIDGE PROJECT

PROJECT TITLE : RETAIL MANAGEMENT APPLICATION USING SALESFORCE

SUBMITTED BY

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INTRODUCTION

you should start on your learning journey? If you've answered yes to any of these questions,

then you're in the right place. This module is for you.

Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster.

As you work toward

your badge for this module, we'll take you through these features and answer the question,

"What is Salesforce, anyway?"

What Is Salesforce?

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up

tasks, and prospective deals might have been organized something like this:

OVER VIEW :

In this project,

- Build a Lightning app, add tabs, and customize page layouts.
- Create custom objects and fields for the app.
- Define relationships between objects.
- Import data and test the app.

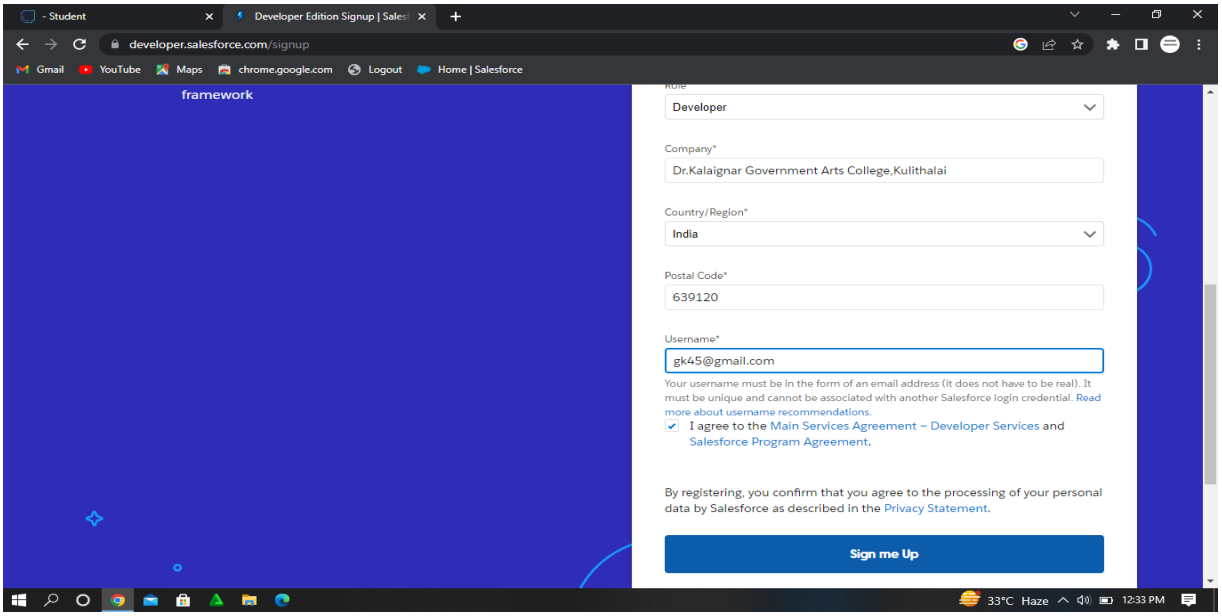
EMPATHY MAP

What does she/he think or feel?
What does really count for her / him?
What is in her / his mind?
What worries and wishes does she / he have?
What does she/he hear?
What do friends, family, and other influencers say to her / him that affects thinking?
What does she/he see?
Which elements of her / his environment influences her / him?
Which competitors does she / he see?
What does she / he see friends doing?
What does she/he say or do?
What is her / his attitude towards others?
What does she / he do in public?
How has her / his behavior changed?
PAIN
What fears, frustrations or obstacles does she / he see?
GAIN
What is she hoping to get? What does success look like?

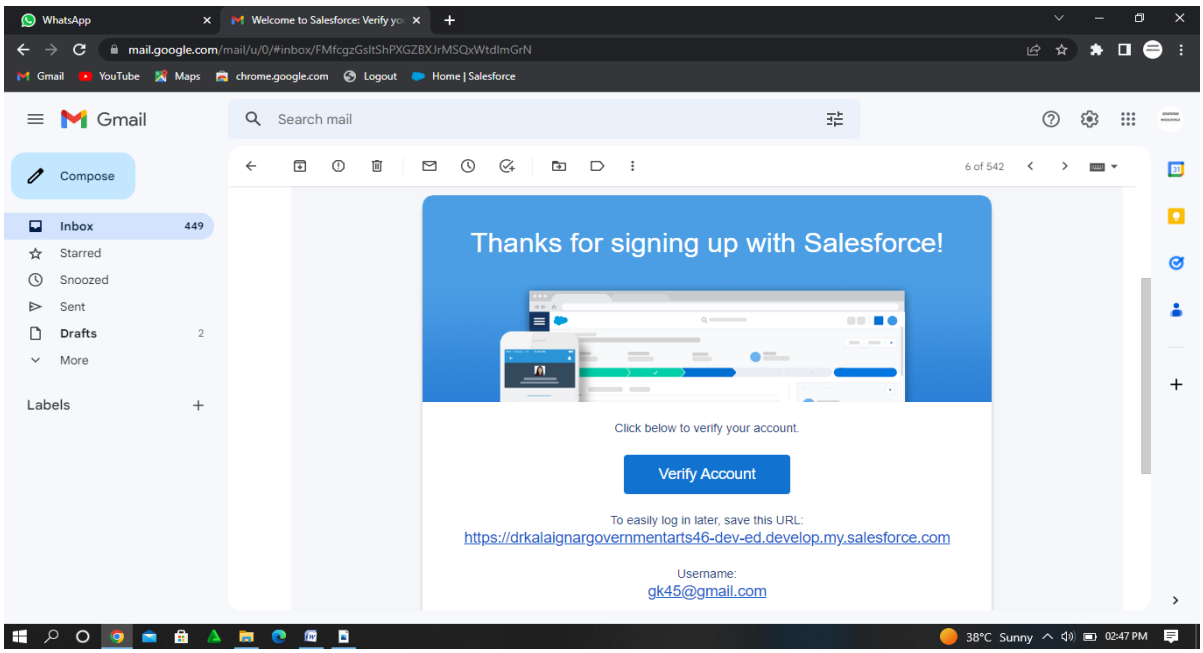
BRAIN STORMING MAP

Milestone 1- Create Salesforce Org:

Creating Developer Account Creating a developer org in salesforce.



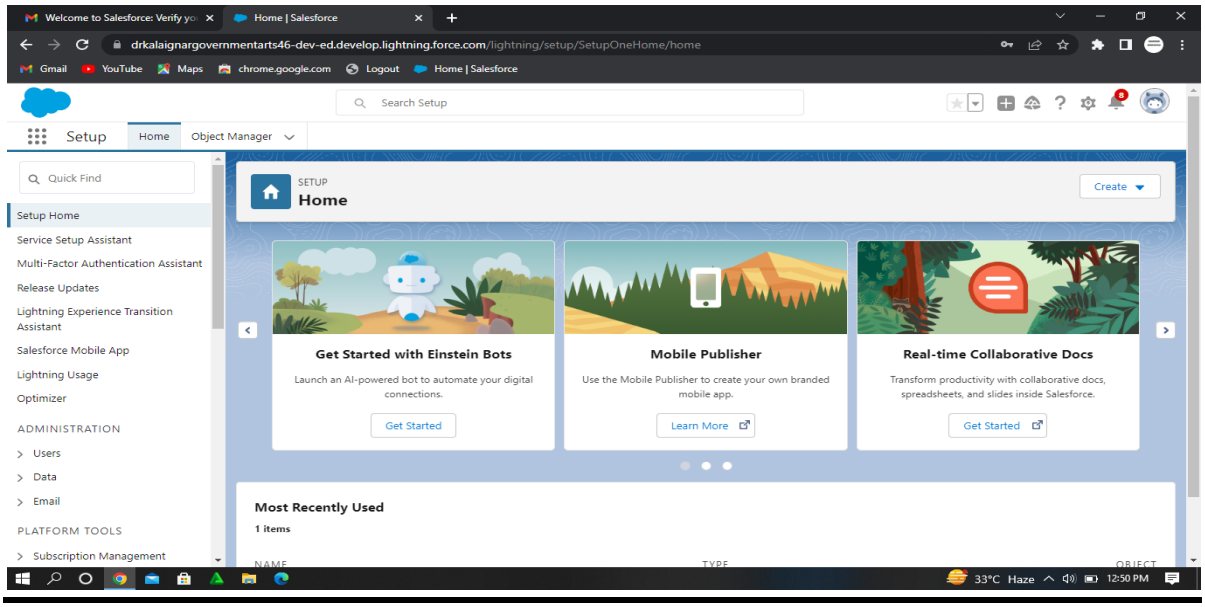
Account Activation.

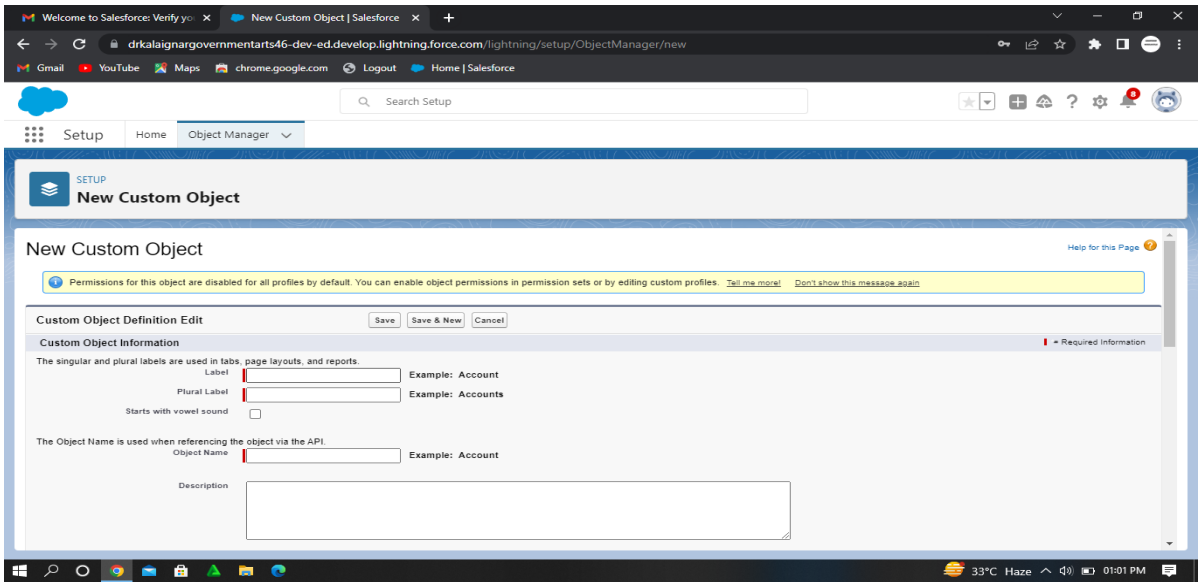


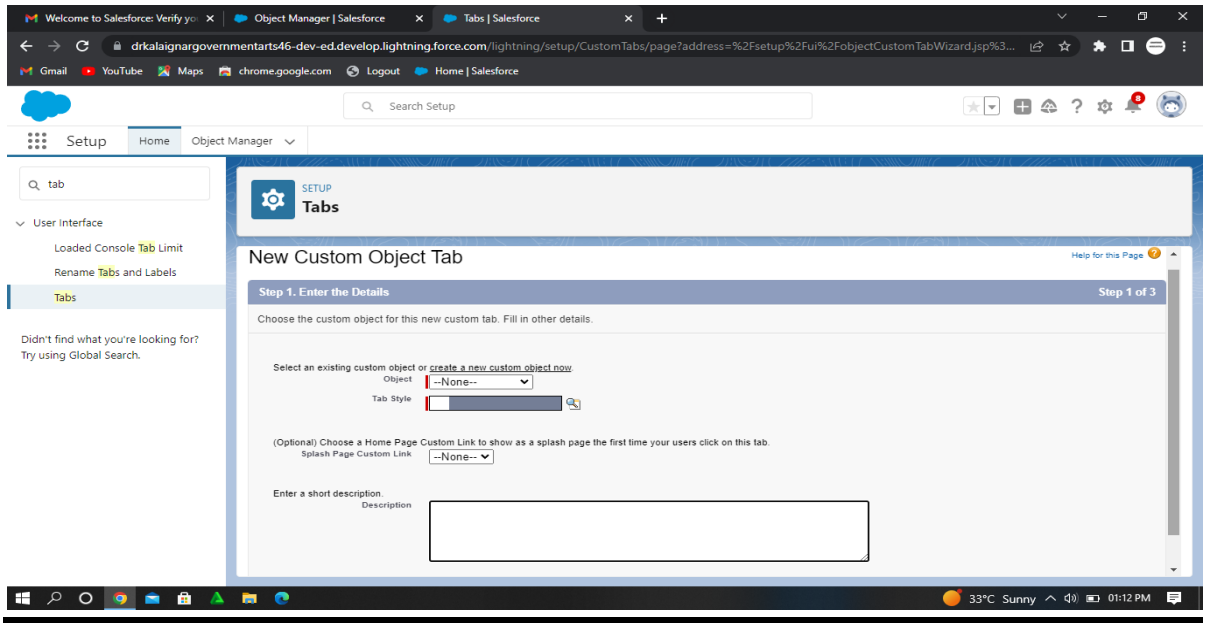
Milestone 2 Object:

Activity-1

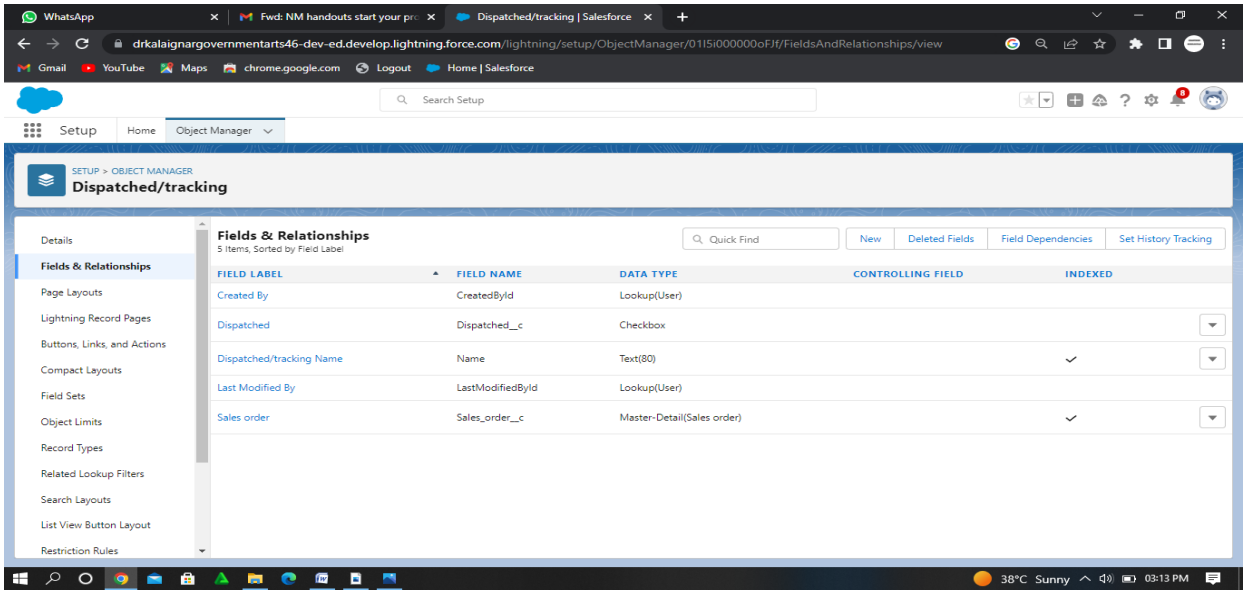
Creation of object Dispatch/Tracking

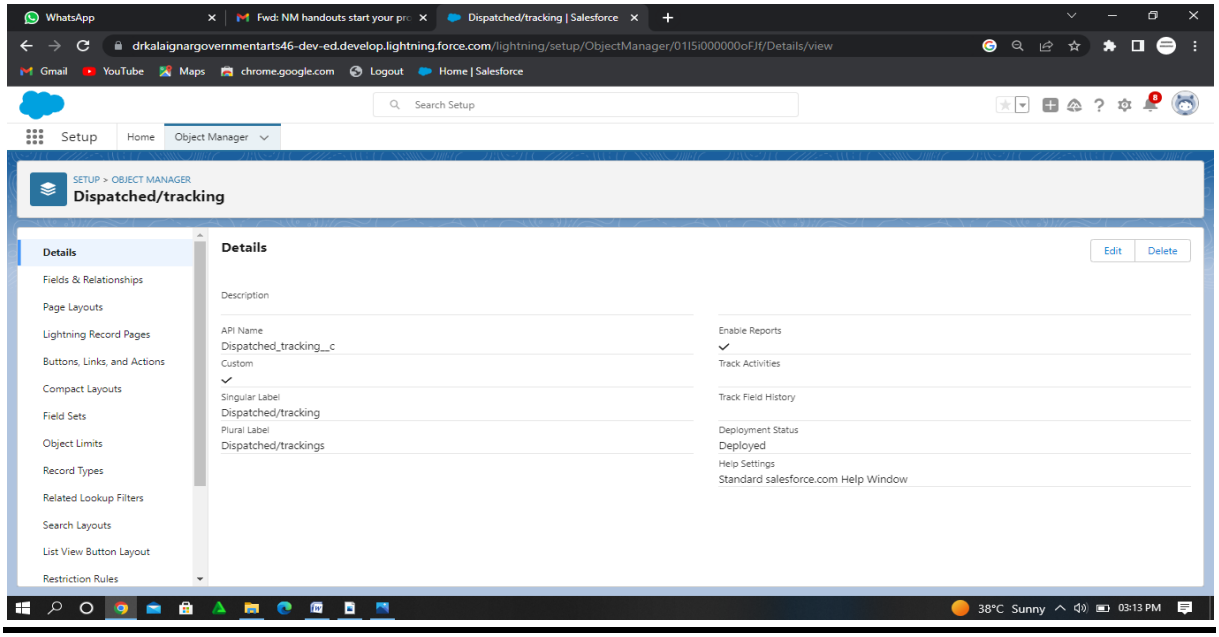


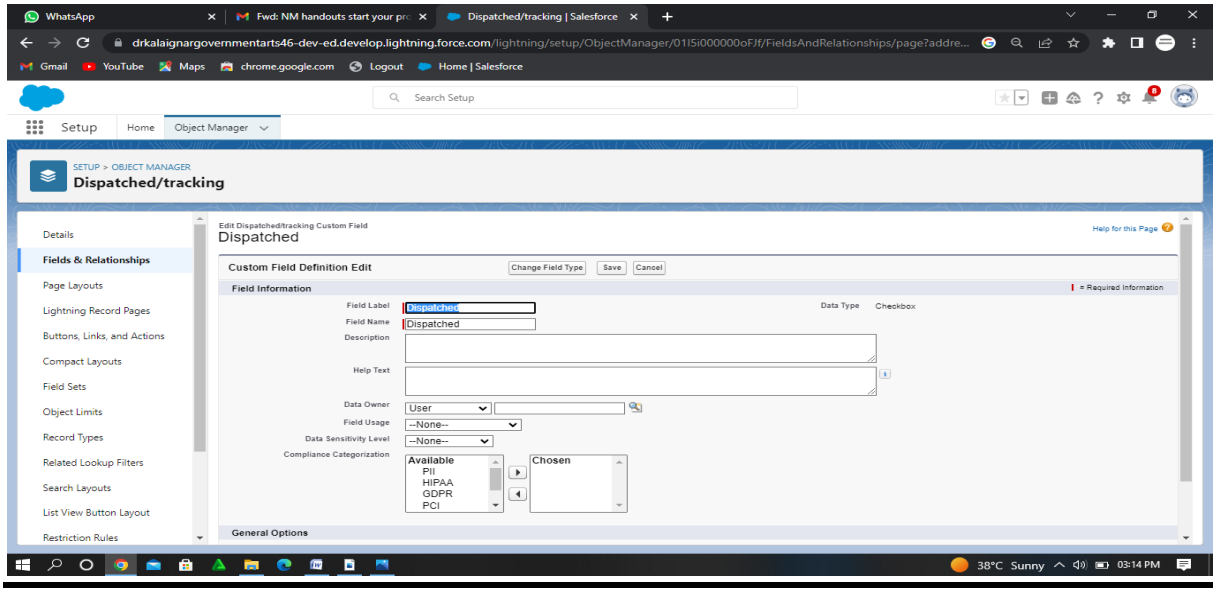

Welcome to Salesforce: Verify yo
New Custom Object | Salesforce
drkalaignargovernmentarts46-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new
Gmail
YouTube
Maps
chrome.google.com
Logout
Home | Salesforce
Search Setup
Setup
Home
Object Manager
SETUP
New Custom Object
New Custom Object
Help for this Page
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
Custom Object Definition Edit
Save
Save & New
Cancel
Custom Object Information
= Required Information
The singular and plural labels are used in tabs, page layouts, and reports.
Label
Example: Account
Plural Label
Example: Accounts
Starts with vowel sound
The Object Name is used when referencing the object via the API.
Object Name
Example: Account
Description
33°C Haze
01:01 PM


Welcome to Salesforce: Verify yo
Object Manager | Salesforce
Tabs | Salesforce
drkalaignargovernmentarts46-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3...
Gmail
YouTube
Maps
chrome.google.com
Logout
Home | Salesforce
Search Setup
Setup
Home
Object Manager
tab
User Interface
Loaded Console Tab Limit
Rename Tabs and Labels
Tabs
Didn't find what you're looking for?
Try using Global Search.
SETUP
Tabs
New Custom Object Tab
Help for this Page
Step 1. Enter the Details
Step 1 of 3
Choose the custom object for this new custom tab. Fill in other details.
Select an existing custom object or create a new custom object now.
Object
--None--
Tab Style
(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.
Splash Page Custom Link
--None--
Enter a short description.
Description
33°C Sunny
01:12 PM

Activity-2 Fields available on Dispatch/tracking

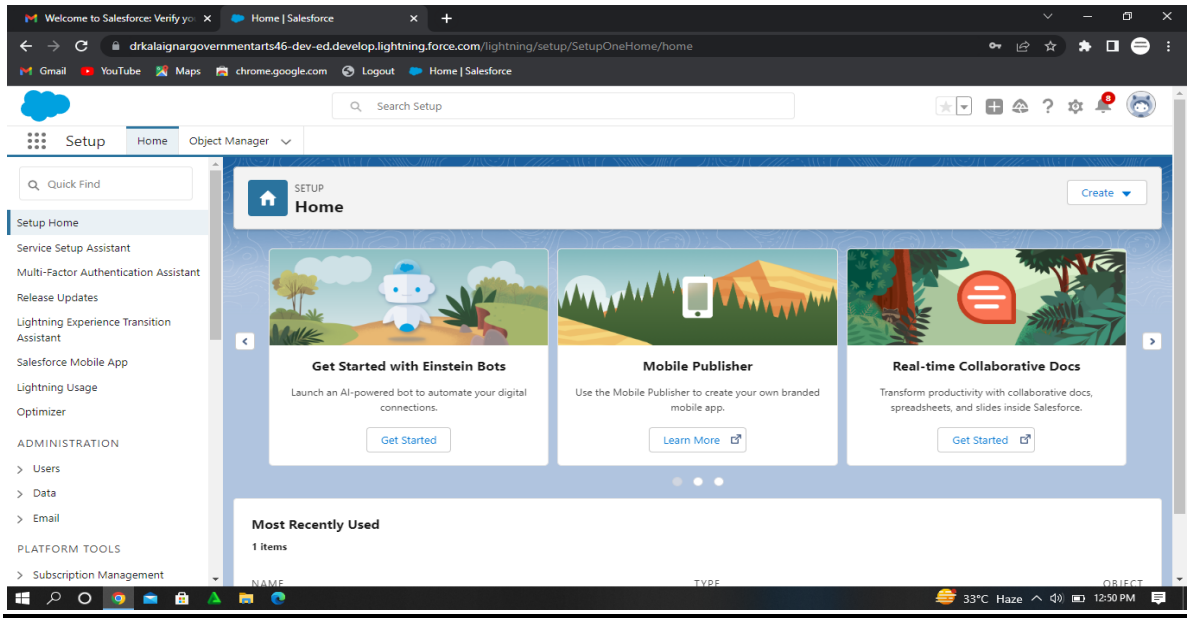


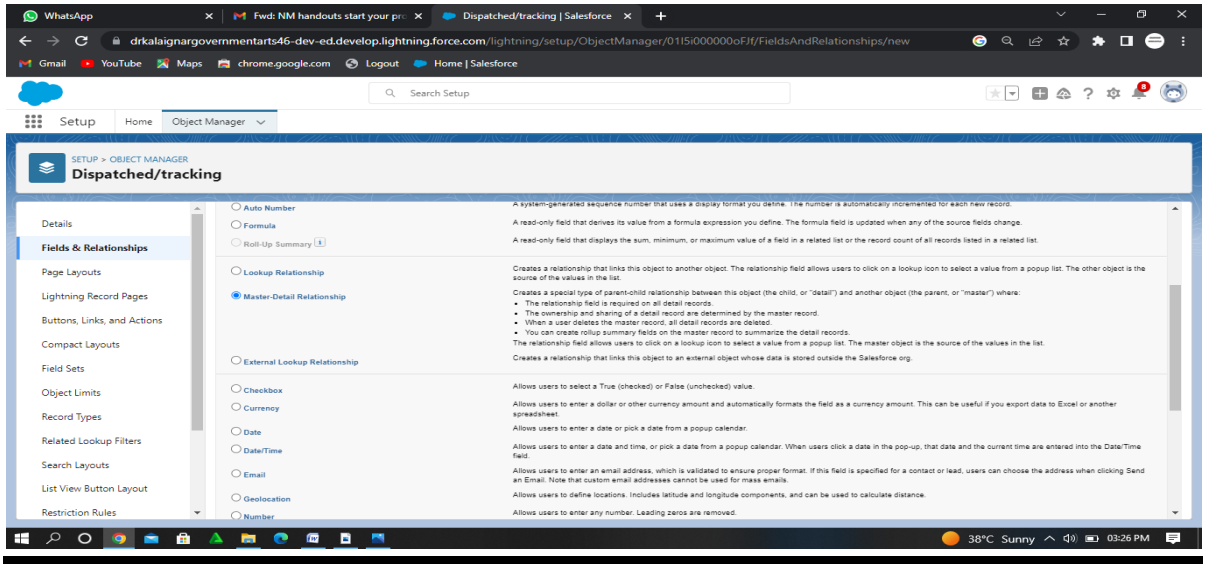




Milestone 3 -: Relationship b/w objects

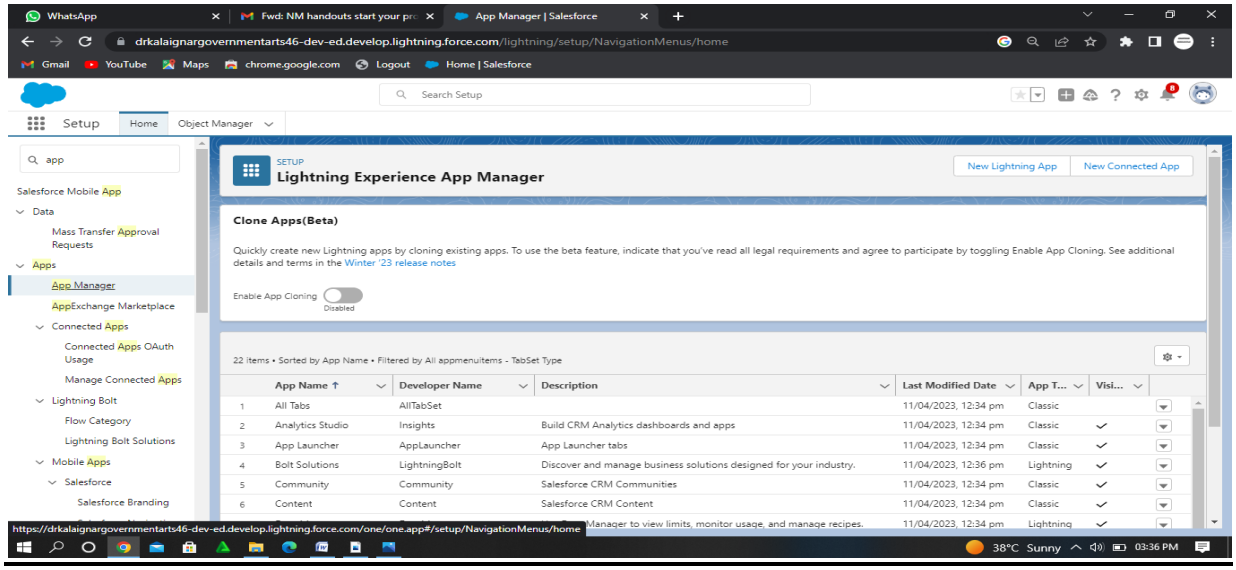
Activity-1

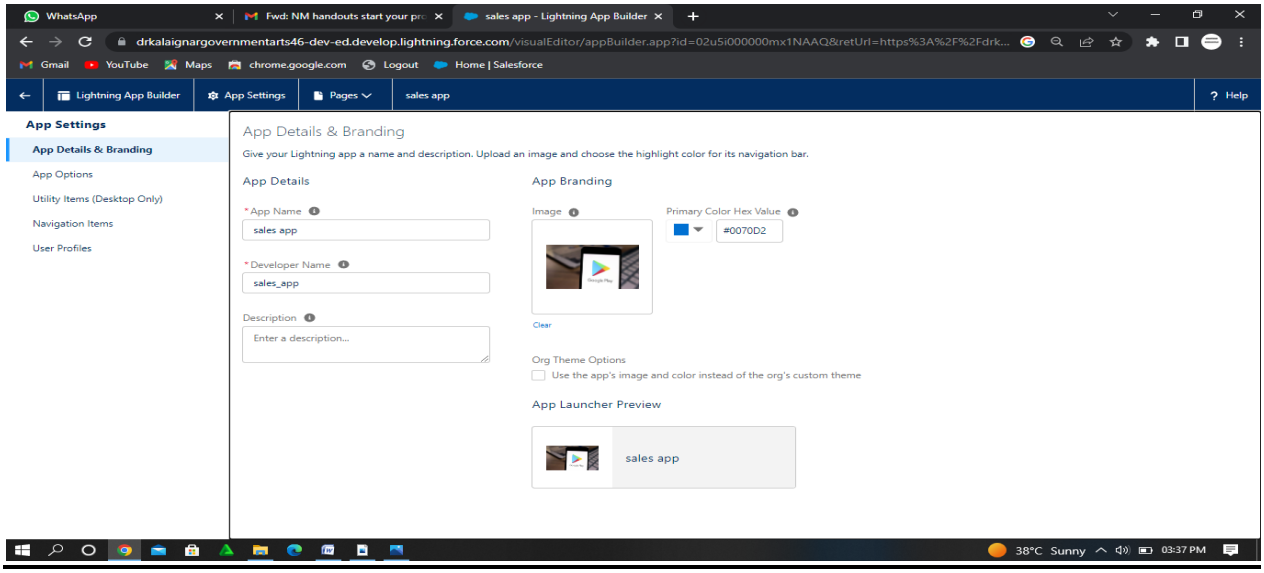




Milestone 4-Application:

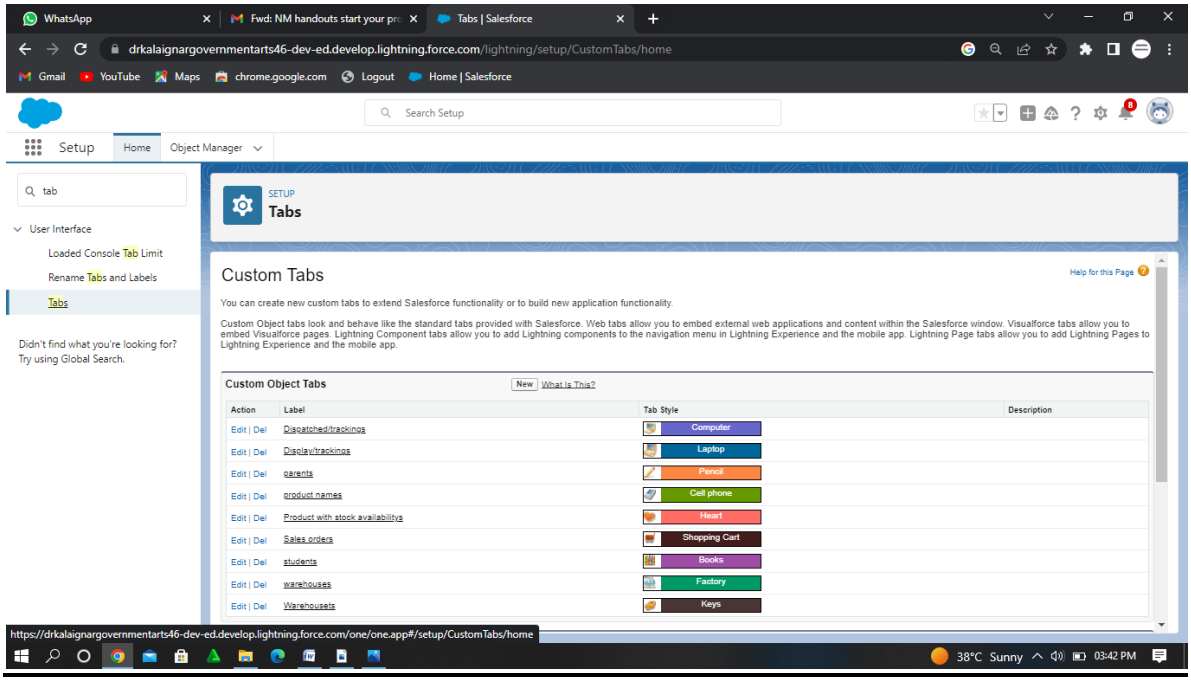
Activity-1

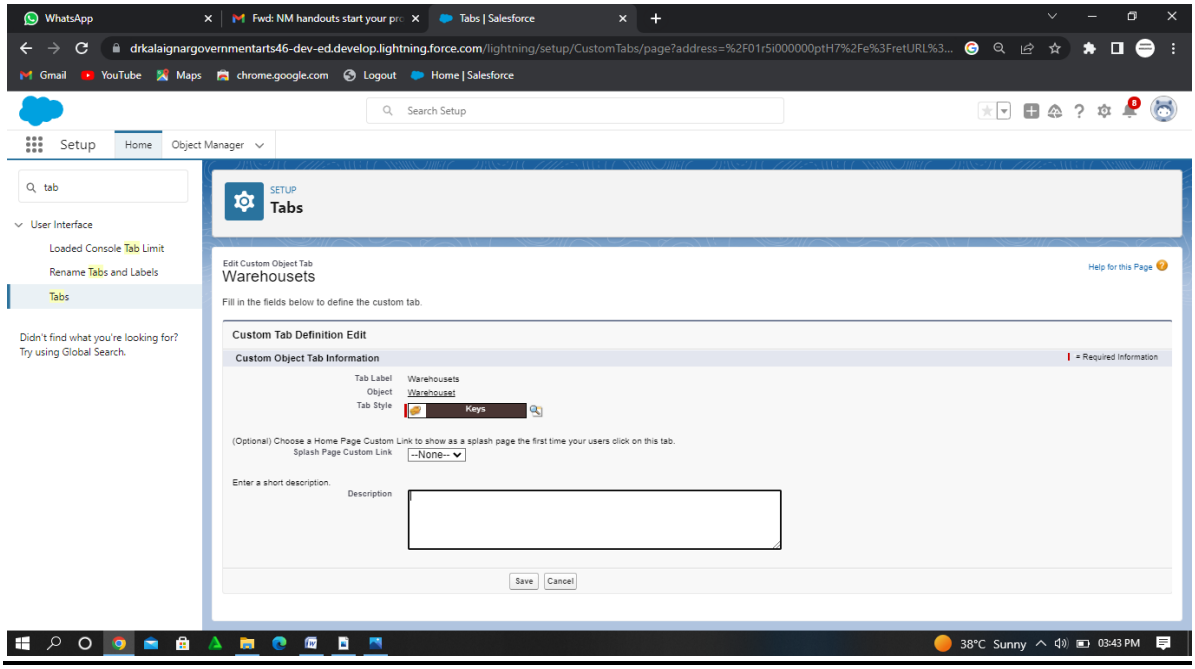




Milestone 5-Layouts:

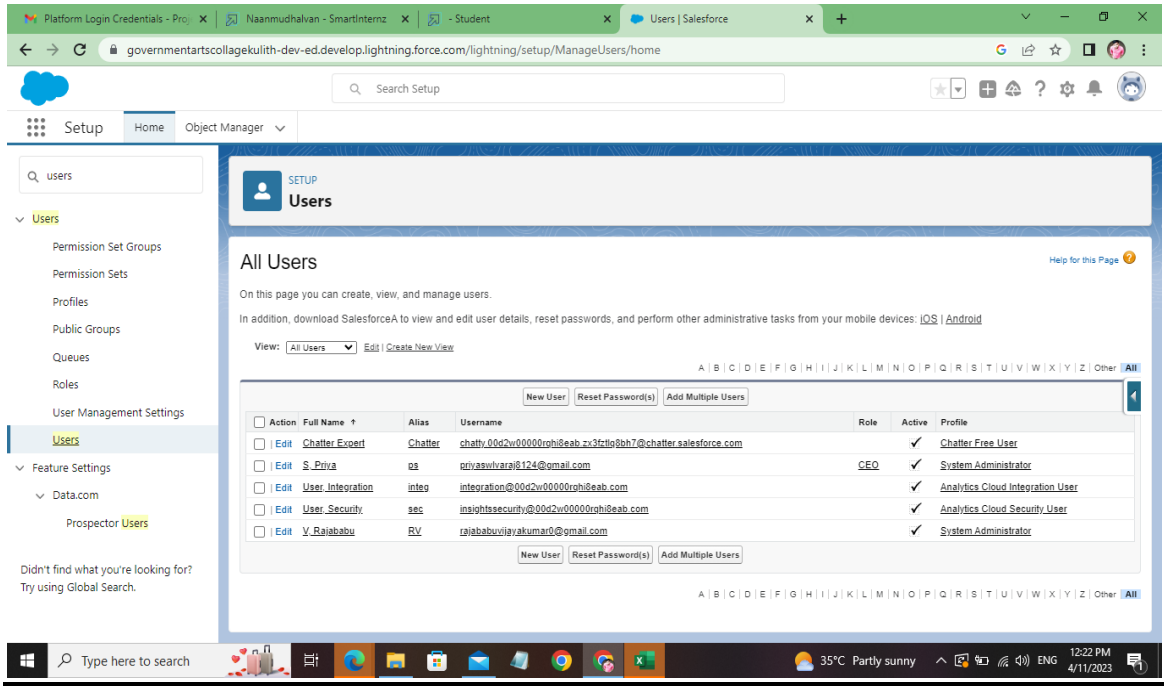
Activity-1

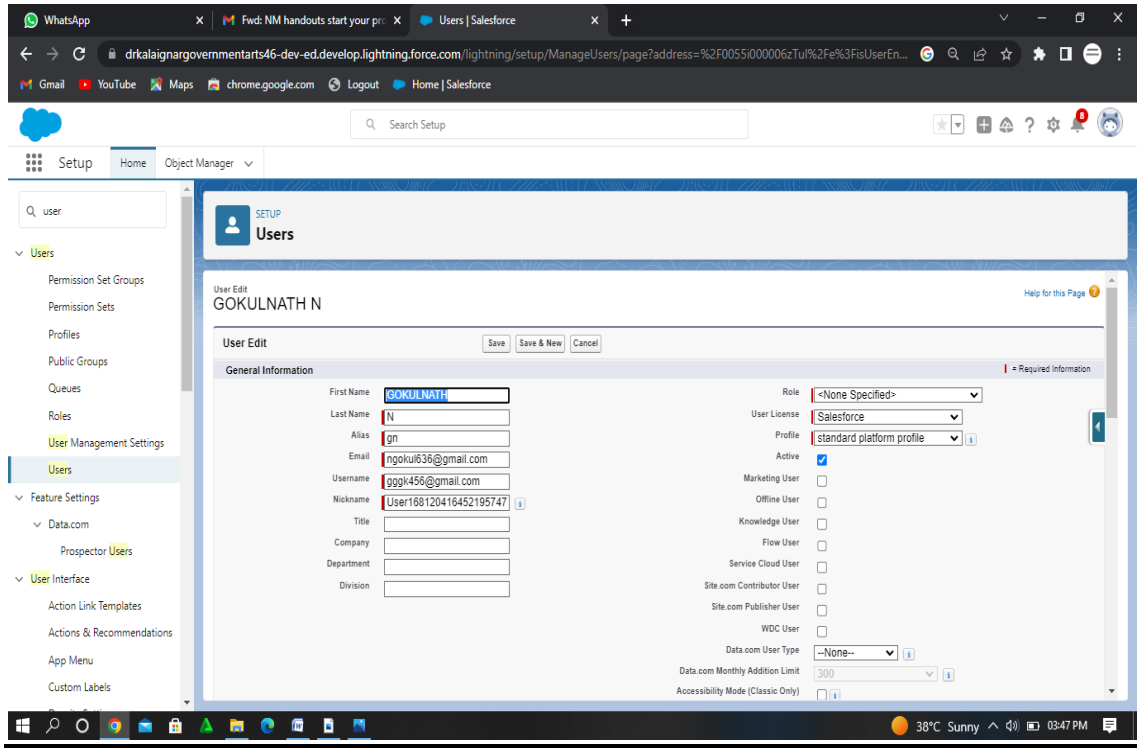




Milestone 6-User:

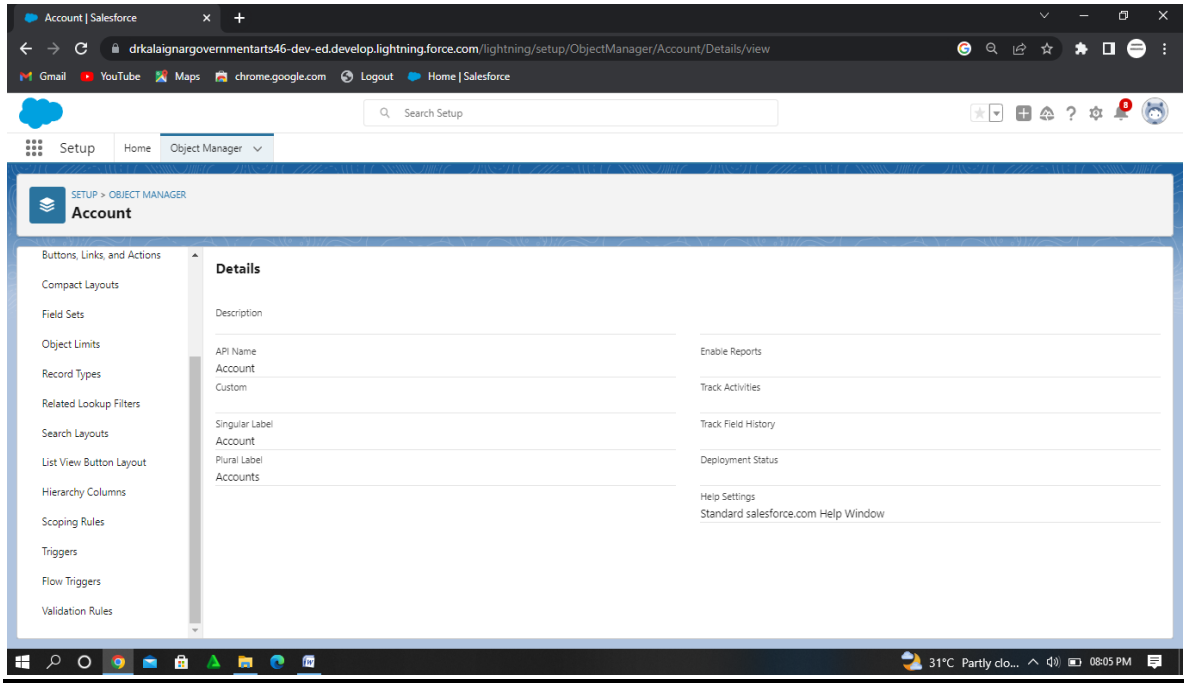
Activity-1

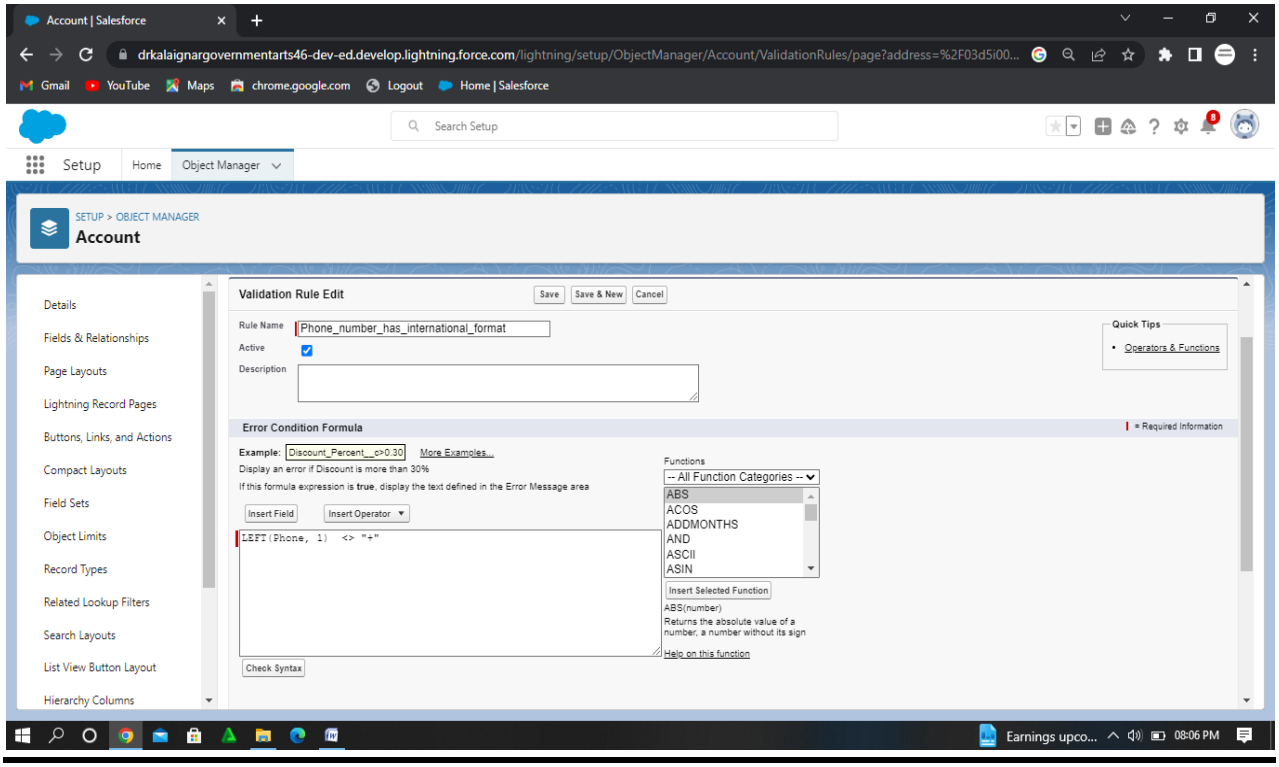




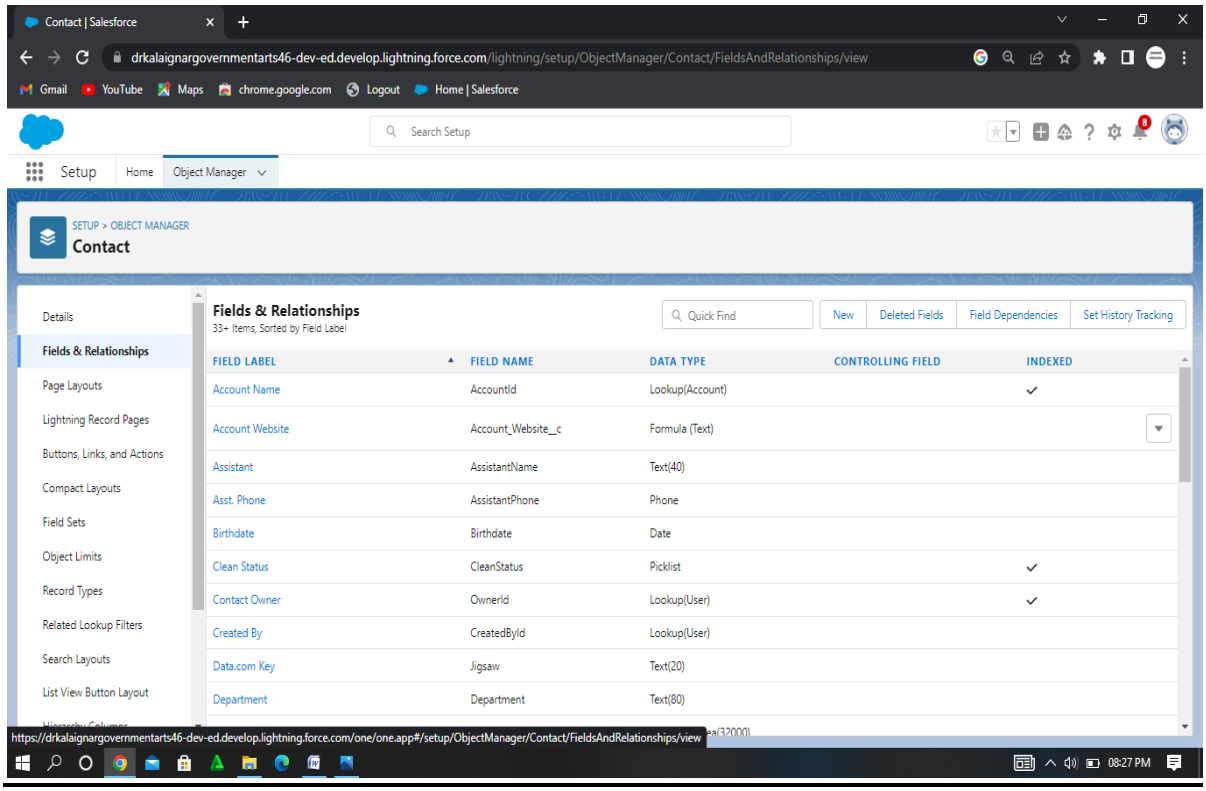
Milestone 7- Validation Rules:

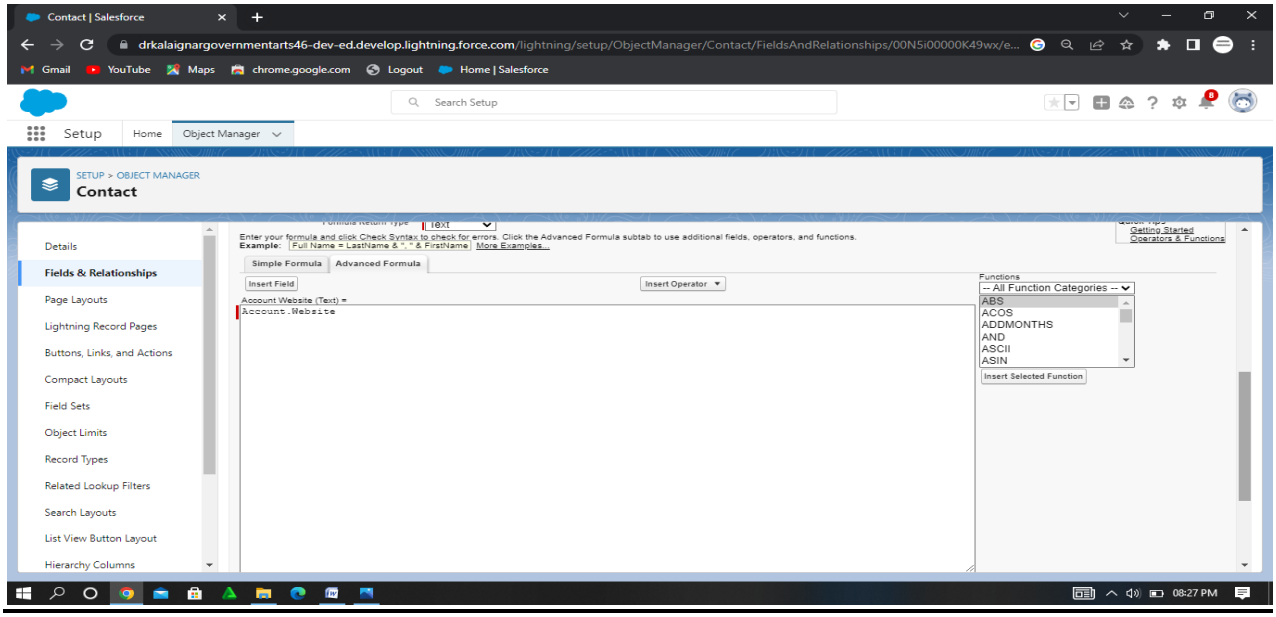
Activity -1



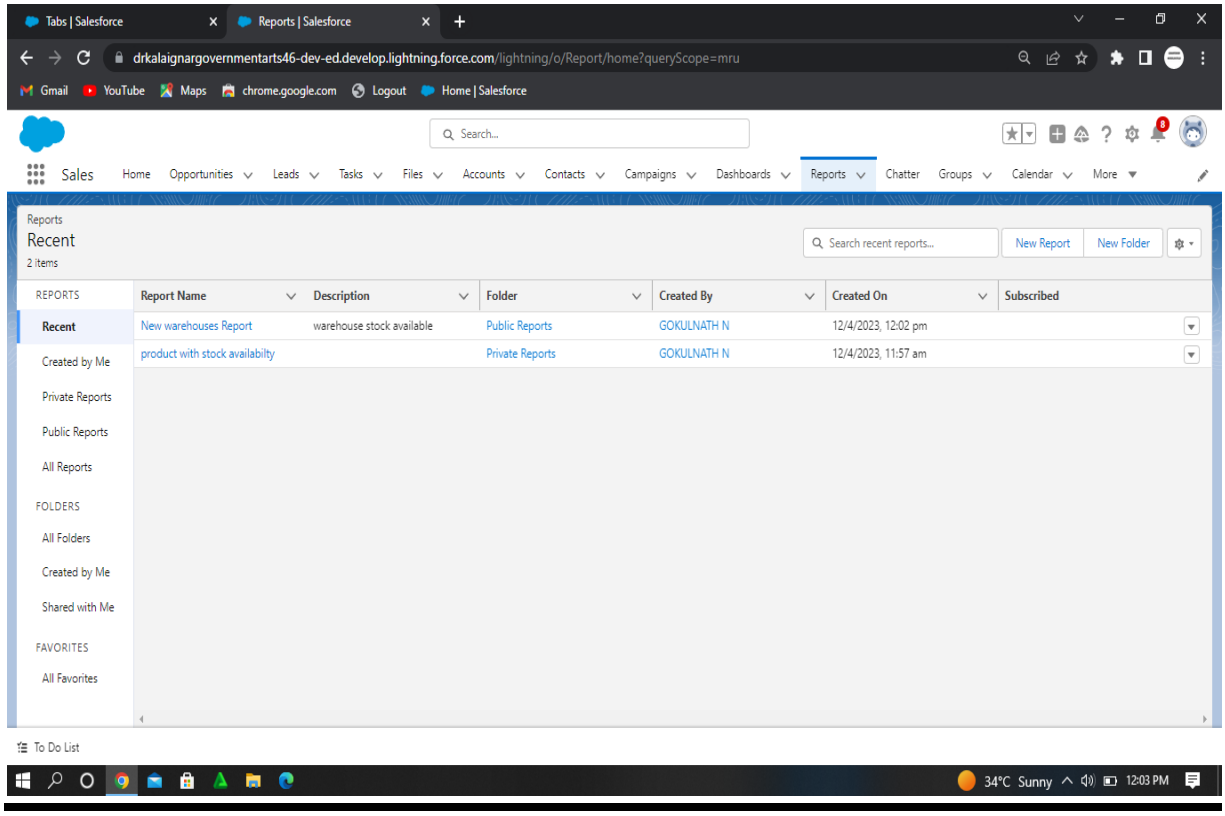

Account | Salesforce
drkalaignargovernmentarts46-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Account/ValidationRules/page?address=%2F03d5i00...
Gmail
YouTube
Maps
chrome.google.com
Logout
Home | Salesforce
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Account
Details
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
Hierarchy Columns
Validation Rule Edit
Save
Save & New
Cancel
Rule Name
Phone_number_has_international_format
Active
Description
Quick Tips
Operators & Functions
Error Condition Formula
= Required Information
Example:
Discount_Percent__c>0.30
More Examples...
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(Phone, 1) <> "+"
Functions
-- All Function Categories --
ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN
Insert Selected Function
ABS(number)
Returns the absolute value of a number, a number without its sign
Help on this function
Check Syntax
Earnings upco...
08:06 PM

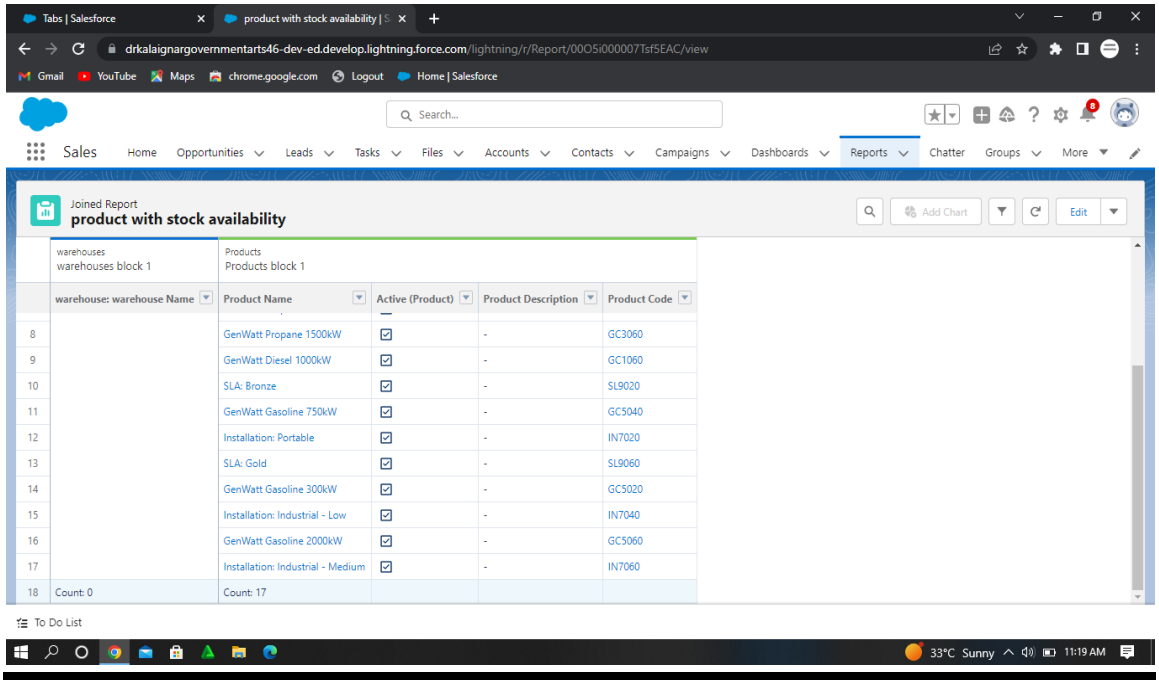
Activity-2:

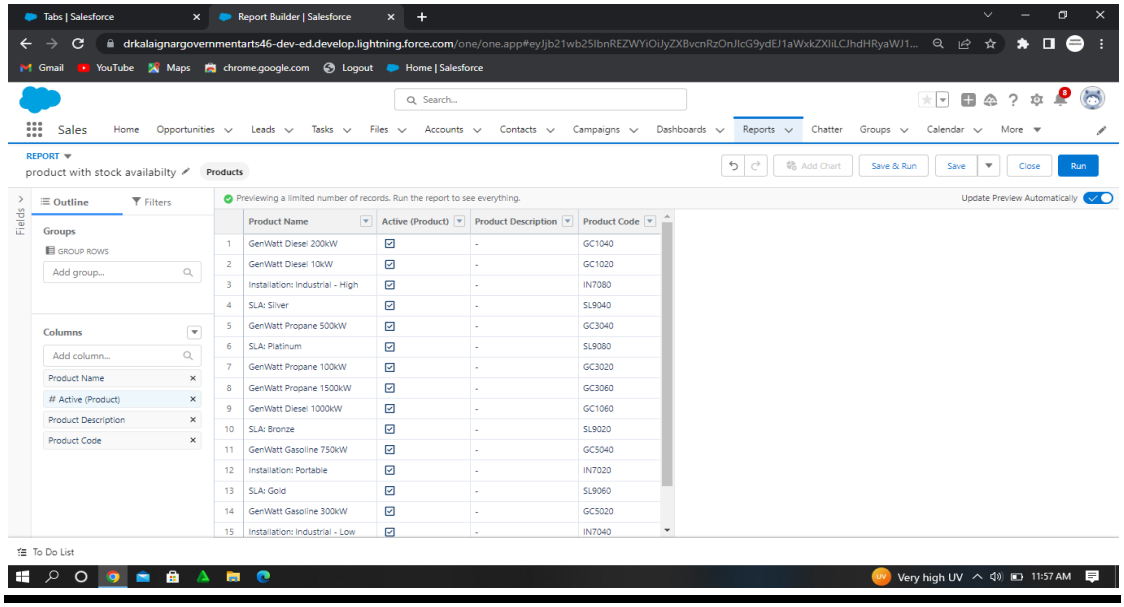

Contact | Salesforce
drkalaignargovernmentarts46-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Contact/FieldsAndRelationships/view
Gmail
YouTube
Maps
chrome.google.com
Logout
Home | Salesforce
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Contact
Details
Fields & Relationships
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
Fields & Relationships
33+ Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Account Name
AccountId
Lookup(Account)
Account Website
Account_Website__c
Formula (Text)
Assistant
AssistantName
Text(40)
Asst. Phone
AssistantPhone
Phone
Birthdate
Birthdate
Date
Clean Status
CleanStatus
Picklist
Contact Owner
OwnerId
Lookup(User)
Created By
CreatedById
Lookup(User)
Data.com Key
Jigsaw
Text(20)
Department
Department
Text(80)
https://drkalaignargovernmentarts46-dev-ed.develop.lightning.force.com/one/one.app#/setup/ObjectManager/Contact/FieldsAndRelationships/view
08:27 PM



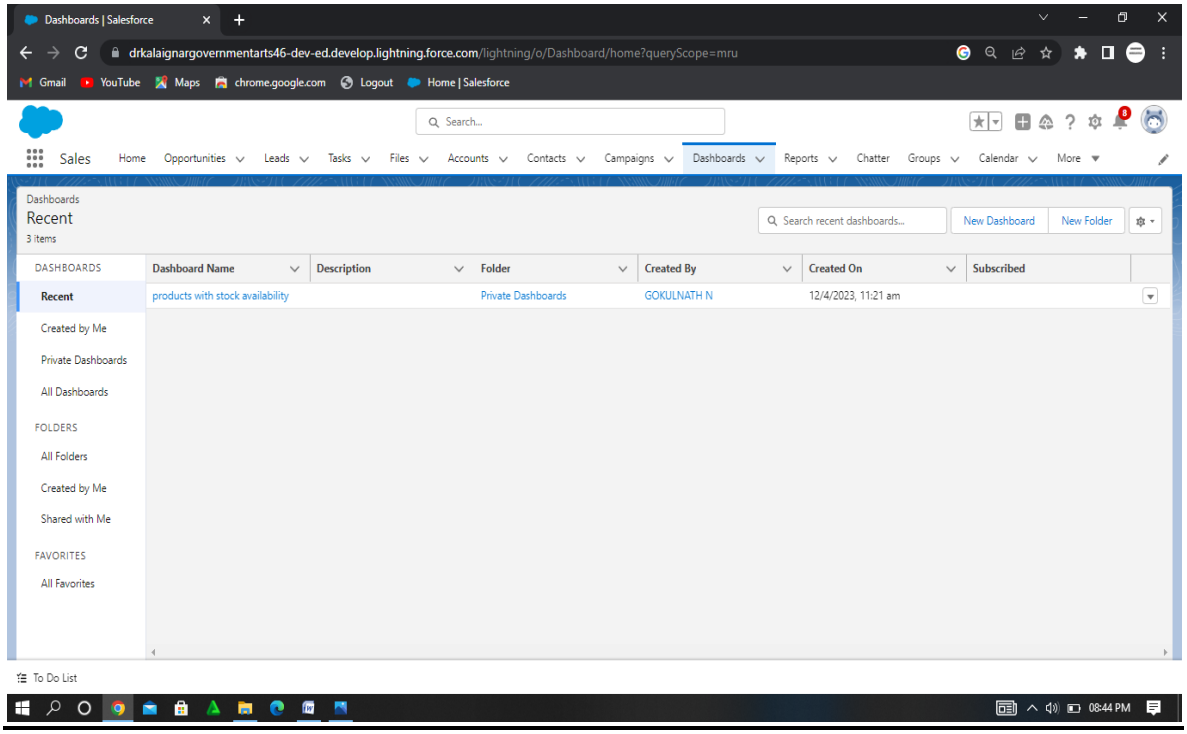
Milestone-7 Reports

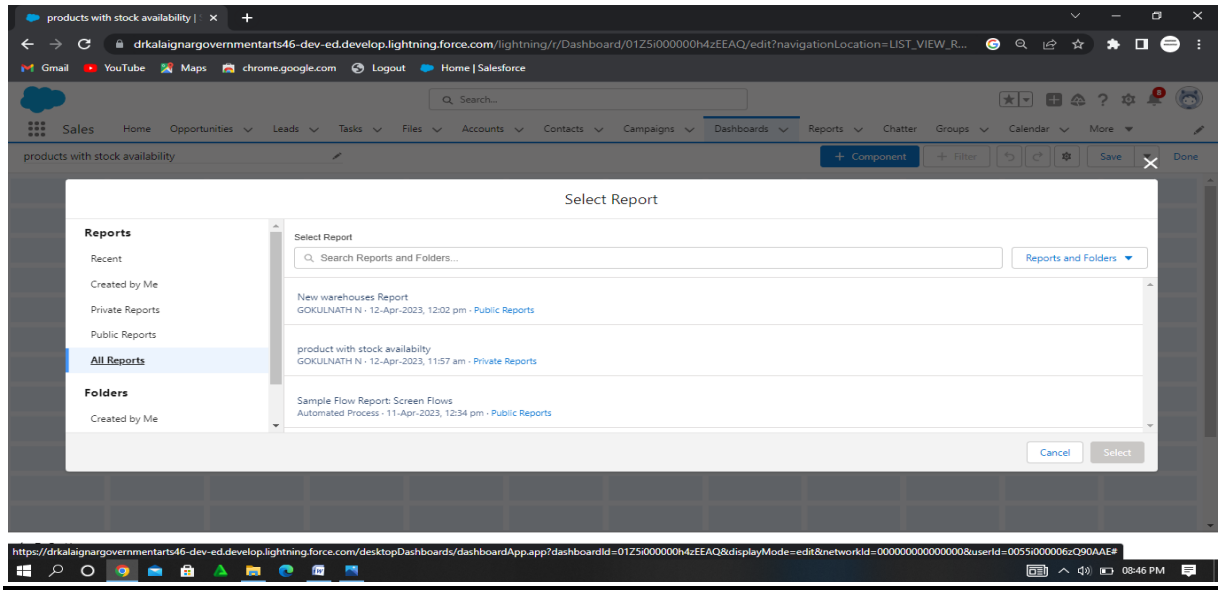



Tabs | Salesforce
product with stock availability | S
drkalaignargovernmentarts46-dev-ed.develop.lightning.force.com/lightning/r/Report/00O5i000007Tsf5EAC/view
Gmail
YouTube
Maps
chrome.google.com
Logout
Home | Salesforce
Search...
Sales
Home
Opportunities
Leads
Tasks
Files
Accounts
Contacts
Campaigns
Dashboards
Reports
Chatter
Groups
More
Joined Report
product with stock availability
Add Chart
Edit
warehouses
warehouses block 1
Products
Products block 1
warehouse: warehouse Name
Product Name
Active (Product)
Product Description
Product Code
8 GenWatt Propane 1500kW GC3060
9 GenWatt Diesel 1000kW GC1060
10 SLA: Bronze SL9020
11 GenWatt Gasoline 750kW GC5040
12 Installation: Portable IN7020
13 SLA: Gold SL9060
14 GenWatt Gasoline 300kW GC5020
15 Installation: Industrial - Low IN7040
16 GenWatt Gasoline 2000kW GC5060
17 Installation: Industrial - Medium IN7060
18 Count: 0
Count: 17
To Do List
33°C Sunny
11:19 AM


Tabs | Salesforce
Report Builder | Salesforce
drkalaignargovernmentarts46-dev-ed.develop.lightning.force.com/one/one.app#eyJjb21wb25lbnREZWYiOiJyZXBvcnRzOnJlcG9ydEJ1aWxkZXIiLCJhdHRyaWJ1...
Gmail
YouTube
Maps
chrome.google.com
Logout
Home | Salesforce
Search...
Sales
Home
Opportunities
Leads
Tasks
Files
Accounts
Contacts
Campaigns
Dashboards
Reports
Chatter
Groups
Calendar
More
REPORT
product with stock availabilty
Products
Add Chart
Save & Run
Save
Close
Run
Outline
Filters
Fields
Groups
GROUP ROWS
Add group...
Columns
Add column...
Product Name
Active (Product)
Product Description
Product Code
Previewing a limited number of records. Run the report to see everything.
Update Preview Automatically
Product Name
Active (Product)
Product Description
Product Code
1 GenWatt Diesel 200kW GC1040
2 GenWatt Diesel 10kW GC1020
3 Installation: Industrial - High IN7080
4 SLA: Silver SL9040
5 GenWatt Propane 500kW GC3040
6 SLA: Platinum SL9080
7 GenWatt Propane 100kW GC3020
8 GenWatt Propane 1500kW GC3060
9 GenWatt Diesel 1000kW GC1060
10 SLA: Bronze SL9020
11 GenWatt Gasoline 750kW GC5040
12 Installation: Portable IN7020
13 SLA: Gold SL9060
14 GenWatt Gasoline 300kW GC5020
15 Installation: Industrial - Low IN7040
To Do List
Very high UV
11:57 AM

Milestone-8 Dashboard





Trailhead Profile Public URL

Team leader - https://trailblazer.me/id/a1795c632a53a21a9f746bab4218a816
Team Member 1 - https://trailblazer.me/id/a87ced34ad2e8f03abdb45b0da11d225f
Team Member 2 - https://trailblazer.me/id/a30ce14500f4870880ff4339840189059
Team Member 3 - https://trailblazer.me/id/a08e2011b3569721a56545ff328bb8f8c

ADVANTAGES & DISADVANTAGES

The main advantages of retailers can be described as follows:

1. **Less Capital Requirement**

It does not require huge investment to start retail business. Retailers buy goods from wholesalers in small quantity and sell to ultimate customers. It does not need large space to store goods. So, retailing can be commenced with little investment.

2**. More Profit Margin**

There is fixed margin of profit for wholesalers. Generally they earn 3% to 8% profit on sale. But there is no fixed margin for retailers, shopkeepers may fix profit margin up to 20% in some cases.

Drawbacks Or Disadvantages Of Retailers:

The main disadvantages of retailers can be described as follows:

1:High Marketing Cost

Retailers should make investment in decoration of shop and display of goods to attract more customers. So, it requires more marketing or advertising cost than wholesalers.

2:Selling Skill Required

It requires good selling skill to attract customers. Retailers should possess the art of good communication and convincing power to influence consumers.

3. Very High Competition

Another disadvantage of retailing is that there is tough competition in the market because several retailers sell similar types of products. So, it is difficult to remain in the competitive environment.

4. No Economies Of Buying

Retailers buy small volume of products from wholesalers. So, they miss the opportunity to enjoy he benefit of economies of buying.

APPLICATIONS

1.Home: This object helps to share post which can have event or document in an organisations.Also I can check how many approvals are pending and their details as well as my organizational calendar and coming task which need my attentions.

2.campaign:It helps to extend opportunity list as Dunnes get the chance to do publicity of their product in different campaigns.

3.lead:It is a child object which generates from different campaigns.

4.Opportunity:If lead is able to get qualify then it gets chance to convert into opportunity.In this application qualification criteria is annual revenue which need to be more than 10k euros.

5.Accounts: Every customer is associated with particular account to process order .

6.Contacts: Contact and account is having master child relation as every account is related to contact in Salesforce application.

7.Dunnes Task: Daily basis takes will be mentioned in this area which is having people associated with that particular task and other respective datails.Campaign is differentiated with Dunnes task based on duration and weightage of event.

8.Dunnes Order: Order contains, information regarding product which is going to sold and contact details with relevant calculation for payment process .

9.Dunnes Invoice: Invoice helps to make track for all transaction done and it is dependent on Dunnes order as it uses lookup data type to fetch respective order details.

10. Groups: This objective his having multiple groups enrolled with multiple internal departments.

11. Products:Dunnes product list contains a particular product code with specific description.

12.Reports & Dashboard : Analysis on sales .

CONCLUSION

In this course we have explored the meaning of the terms retailing, marketing and marketing communications. We have also considered the importance of the marketing mix and identified the different communication tools that a retailer might use to interact and communicate with their target customers. You have been introduced to a few theoretical concepts and ideas, which have been illustrated using real world examples and cases in retailing.

You have been introduced to some of the key areas of marketing communications – the message, the media and the communication tools. You have considered the basics of the communication model that underpins the development of marketing

communication messages. You have also explored what it takes to develop a communication message, how to use communications to build a brand and the characteristics of the different media that might carry marketing communications. In addition, you have identified a range of communication tools which make up the marketing communication mix.

The course has also aimed to introduce the importance of marketing and communication from a retail perspective.

FUTURE SCOPE

Retailing has a very wide scope. It is one of the fastest growing industries in India and is providing employment opportunities to many people. Retailing provides employment in two ways. Firstly, it provides entrepreneurship opportunities to the people and secondly, it provides employment to so many people who cannot own the retail stores.

With the increase in the purchasing power of the people and the rural reach of the retailers, the scope of retailing has increased manifold. The scope of retailing can be viewed from the two viewpoints. One from the retailer's, i.e., the entrepreneur's perspective and the other from the employee's perspective.

1. Retailer's Perspective:

From the retailer's perspective, retailing can include anything that the retailer wishes to sell. It may be goods or services. These may include goods such as mobiles, computers, electronics, readymade garments, textiles and clothing, jewellery, books, paintings, medicines, stationery, watches, or may include services such as catering, hospitality, hospitals etc.

However, in certain cases permission in form of license is required to be obtained from the government. In such cases the retailer will have to comply with all the legal formalities before starting a business. For example, a license is required to operate a chemist's shop. Hence, the retailer must possess the required qualifications and hence may apply for the license.

2. Employee's Perspective:

Retailing has provided tremendous opportunities of employment. The retailers operating at a small level required small number of employees to help them in business. These employees were appointed as salesmen, cleaners, cashiers, etc. by the retailers. But with the increase in the scope of operations and the growth of retailing, there has been tremendous change in the industry.

Now the retailers operate at bigger levels having separate departments for everything such as finance, marketing, advertising and sales, human resource development, etc. Hence, the retailers provide enormous opportunities to the employees.