

# **Retail Management Application Using Salesforce**

## **1.INTRODUCTION**

### **1.1 Overview:**

- Retailing encompasses the business activities involved in selling goods and services to consumers for their personal, family, or household etc.
- A CRM product owner has requested create two applications, one is a sales app for sales reps to use this application and store customers data, and the second application is a service app for service reps/agents to provide support to customers in dealing cases.
- To generate business on top of the customers.  
questions, then you're in the right place
- This module is for you.  
Welcome to Salesforce! Salesforce is game-changing technology, with a productivity-boosting features, that will help you sell smarter and faster.

### **1.2.Purpose:**

- Objects are database tables that permit you to store data that is specific to an organization. Salesforce objects are of two types: 1) Standard objects, 2) Custom objects.

## **3.RESULT**

### **3.1.Data Model:**

Application	Object	Description
Sales app	Campaign	We do promotions by using this object
	Leads	We capture leads here
	Accounts	We capture customers data
	contacts	Employees data of customer
	opportunities	SMB sales orders data
	products	Here we store product details i.e electronic types
	Warehouse	We capture stocks data
	Sales order	This is an actual order which has invoice details
	Dispatch/Tracking	Orders dispatch related info will be stored here

Application	Object	Description
Service app	Cases	Historical problems of customers will be stored here
	Accounts	We captures customers data

### 3.2.Activity and Screenshot:

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SetupHomeObject Manager

SETUP > OBJECT MANAGER

Display/tracking

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

Details

Description

API Name  
Display\_tracking\_\_c

Custom

Singular Label  
Display/tracking

Plural Label  
Display/trackings

Enable Reports  
✓

Track Activities

Track Field History

Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

EditDelete

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Fields & Relationships

5 Items, Sorted by Field Label

Quick Find

NewDeleted FieldsField DependenciesSet History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Dispatched	Dispatched__c	Checkbox		
Display/tracking Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User.Group)		✓

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### SETUP > OBJECT MANAGER

## Display/tracking

Details

**Fields & Relationships**

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☐ Formula

A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

☐ Roll-Up Summary

A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

☐ Lookup Relationship

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

☒ Master-Detail Relationship

Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list. Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

☐ External Lookup Relationship

☐ Checkbox

Allows users to select a True (checked) or False (unchecked) value.

☐ Currency

Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

☐ Date

Allows users to enter a date or pick a date from a popup calendar.

☐ DateTime

Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the DateTime field.

☐ Email

Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the

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### SETUP > OBJECT MANAGER

## Display/tracking

Details

**Fields & Relationships**

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### Display/tracking

## New Relationship

Step 4. Establish field-level security for reference field Step 4 of 6

[Previous](#) [Next](#) [Cancel](#)

Field Label	Order	
Data Type	Master-Detail	
Field Name	Order	
Description		
These are the field-level settings for a Master-Detail relationship. They cannot be changed.		
Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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Step 6. Add custom related lists

Previous Save & New Save Cancel

Field Label	Order
Data Type	Master-Detail
Field Name	Order
Description	

Specify the title that the related list will have in all of the layouts associated with the parent.

Related List Label

These are the page layouts that will include this field. Because this is a Master-Detail relationship, the field is required.

Add Related List	Page Layout Name	Order
<input checked="" type="checkbox"/>	Order Layout	

☒ Append related list to users' existing personal customizations

Previous Save & New Save Cancel

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App Manager | Salesforce

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Apps

App Manager

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Try using Global Search.

SETUP

Lightning Experience App Manager

New Lightning App New Connected App

Clone Apps(Beta)

Quickly create new Lightning apps by cloning existing apps. To use the beta feature, indicate that you've read all legal requirements and agree to participate by toggling Enable App Cloning. See additional details and terms in the [Winter '23 release notes](#)

Enable App Cloning ☐ Disabled

23 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

	App Name	Developer Name	Description	Last Modified	Ap...	Vi...
1	All Tabs	AllTabSet		14/03/2023, 11:49 am	Classic	
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	14/03/2023, 11:49 am	Classic	✓
3	App Launcher	AppLauncher	App Launcher tabs	14/03/2023, 11:49 am	Classic	✓
4	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your i...	14/03/2023, 11:51 am	Lightning	✓

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Q tabs

User Interface

Rename Tabs and Labels

Tabs

Didn't find what you're looking for? Try using Global Search.

### Lightning Experience App Manager

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Enable App Cloning ☐ Disabled

24 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

App Name	Developer Name	Description	Last Modified	Ap...	VI...
1 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	14/03/2023, 11:49 am	Classic	✓
2 App Launcher	AppLauncher	App Launcher tabs	14/03/2023, 11:49 am	Classic	✓
3 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your i...	14/03/2023, 11:51 am	Lightning	✓

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Q tabs

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Rename Tabs and Labels

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### Custom Tabs

Help for this Page

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

#### Custom Object Tabs

New What Is This?

Action	Label	Tab Style	Description
Edit   Del	Brokers	People	
Edit   Del	Properties	Real Estate Sign	

#### Web Tabs

New What Is This?

No Web Tabs have been defined

#### Visualforce Tabs

New What Is This?

Home | Salesforce x Users | Salesforce x +

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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

SETUP Users

Help for this Page

All Users

On this page you can create, view, and manage users.  
In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: iOS | Android

View: All Users Edit Create New View

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

New User Reset Password(s) Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Eveest	Chatter	chattv00g2w00000rkkoest.uto7nknobas@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	Thasna G	GThas	thasnaabtu@gmail.com		✓	System Administrator
<input type="checkbox"/> Edit	User Integration	integ	integration@00g2w00000rkkoest.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightsssecu@00g2w00000rkkoest.com		✓	Analytics Cloud Security User

New User Reset Password(s) Add Multiple Users

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

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Validation Rule Edit

Save Save & New Cancel

Rule Name Phone\_number\_has\_international\_format

Active ☒

Description

Quick Tips

Operators & Functions

Error Condition Formula

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) <> "+"

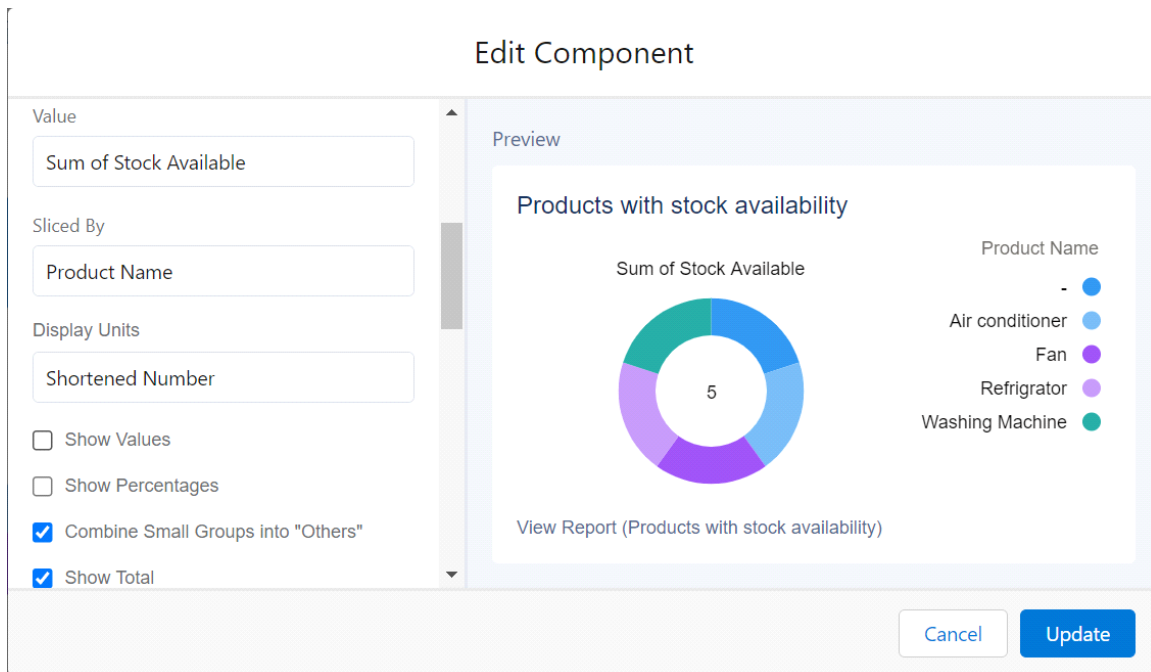
Functions

-- All Function Categories --

ABS  
ACOS  
ADDMONTHS  
AND  
ASCII  
ASIN







## 4.Trailhead Profile Public URL

**Team Lead** -<https://trailblazer.me/id/vini2013>)

**Team Member 1** - <https://trailblazer.me/id/kumtk2>

**Team Member 2** - <https://trailblazer.me/id/suba466>

**Team Member 3** – <https://trailblazer.me/id/gganapathi1>

## 5. ADVANTAGES & DISADVANTAGE :

### ADVANTAGES

- Benefits of having an effective retail management strategy.
- A company can increase the efficiency of each process and better ensure a high-quality standard for employees.
- As a result, executives may accomplish their goals at faster rates.

### DISADVANTAGE

- Inadequate capital is always a big problem to their trade.
- No room for expansion due to lack of enough capital.
- Inability to enjoy economies of scale.

## 6. APPLICATION

- IT helps to store customer data, which the retailer can then use to reach out to customers.
- Through email with personalized offers or with mail offers. And when at the checkout process, retailers can search up the customer's information to make their experience efficient and quick.

## **7. CONCLUSION**

- Whether you have a small shop or a mega store, if you own a retail business, then retail management is a must to run it effectively and efficiently.
- From the above discussion, we can realize the importance of retail management.
- It helps retailers save time and gain customer satisfaction.

## **8. FUTURE SCOPE**

- The retail sector in the country is currently booming, providing plenty of career prospects for people with a passion for sales marketplaces, business diversification, campaigning, advertising, market research, and segmentation.