



# GOVERNMENT OF TAMILNADU

**Naan Muthalvan - Project-Based Experiential Learning  
RETAIL MANAGEMENT APPLICATION USING SALESFORCE**

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**M.V.MUTHIAH GOVERNMENT ARTS COLLEGE FOR WOMEN**

**DINDIGUL-624001.**

**B(Affiliated To Mother Teresa Women's University Kodaikanal)**

**Reaccredited with "A" Grade by NAAC**

**DINDIGUL-624001.**

**APRIL - 2023**



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**M.V.MUTHIAH GOVERNMENT ARTS COLLEGE FOR WOMEN**  
**(Affiliated to Mother Teresa Women's University, Kodaikanal)**  
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**Dindigul - 624 001**



**PG & RESEARCH DEPARTMENT OF MATHEMATICS**

**BONAFIDE CERTIFICATE**

This is to certify that this is a bonafide record of the project entitled, "RETAIL MANAGEMENT APPLICATION USING SALESFORCE". This is submitted in partial fulfillment for the award of Mr.S. MALLIKA (20321TR019), Mr.K. MOHANAPRIYA (20321TR020), Mr.S. NALINADEVI (20321TR021), Mr.C. NISHA JENIFER (20321TR022) the degree of Bachelor of Science in Mathematics in M.V.MUTHIAH GOVERNMENT ARTS COLLEGE FOR WOMEN,DINDIGUL during the period of December 2022 to April 2023.

*T. Enve*

*BD*

**Project Mentor(s)**  
**Department**

**Head of the**



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Submitted for viva-voce Examination held on \_12-04-2023\_\_\_\_\_

## **RETAIL MANAGEMENT APPLICATION USING SALESFORCE INTRODUCTION**

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.

### **1.1 Overview**

**Salesforce management is the soul of the company, establishing a word recognize brand does not only require marketing and advertise efforts ,but it also requires the sales representatives or in simple words salesforce along with all other promotional activities. Salesforce – Division of a business responsible for selling products or services.**

**Salesforce is linking between companies and customer. Therefore, companies must be careful in designing and structuring salesforce**

**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**



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**you fulfill a customer's needs.**

**A good store manager helps customers leave the store with a smile. They also are responsible for:**

- **Developing strategies to the customer pool**
- **Growing store traffic**
- **Motivating employees**

## **1.2 Purpose**

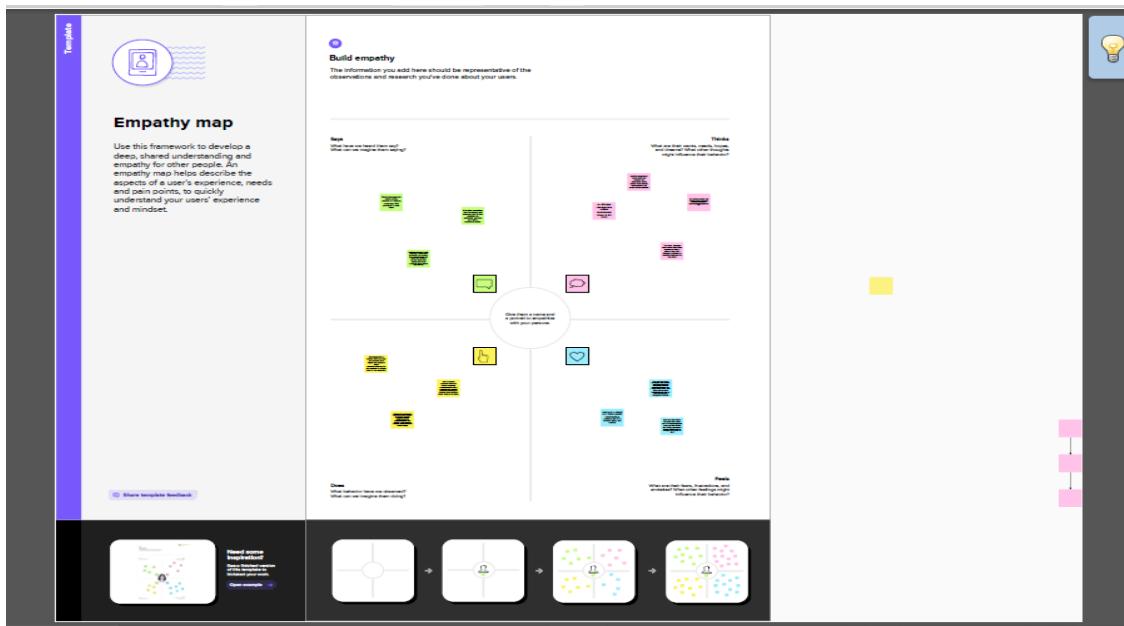
**Salesforce can be used to manage orders from retail stores and distributors, including tracking orders, processing payments, and managing inventory levels. This can help field sales teams ensure that orders are fulfilled quickly and accurately and that inventory levels are maintained at optimal levels.**

# **2 Problem Definition & Design Thinking**

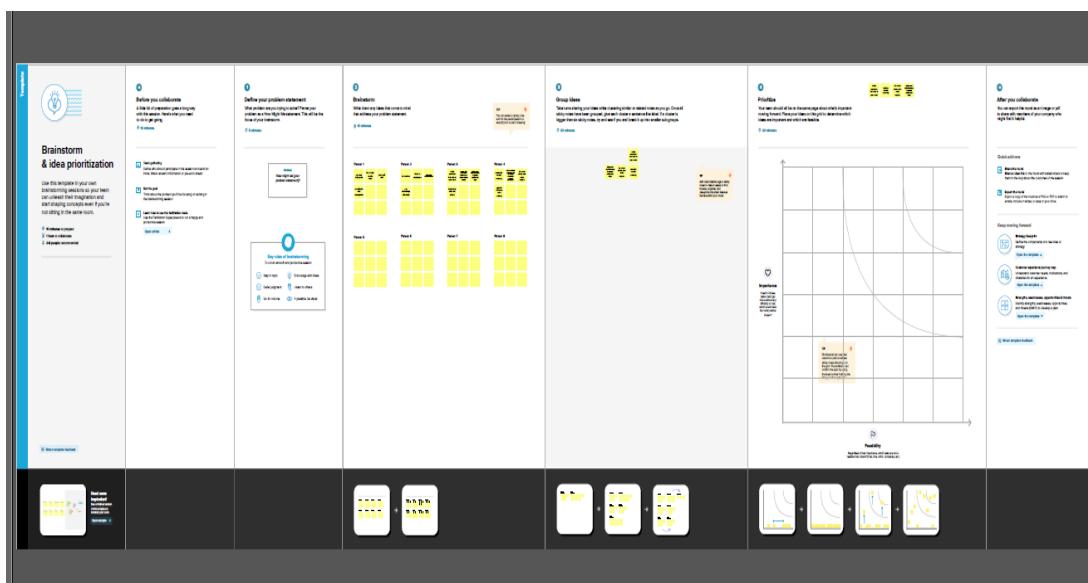
## **2.1 Empathy Map**



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## 2.2 Ideation & Brainstorming Map



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### **3 RESULT**

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

<b>Object name</b>	<b>Fields in the object</b>	
Dispatch/tracking	<b>Field label</b>	<b>Data type</b>
	Display/tracking	text
Dispatch/tracking	<b>Field label</b>	<b>Data type</b>
	Dispatched	Check box
	Expected date of delivery	Check box
	Tracking ID	Check box
	Sales order	Check box

#### **3.2 Activity & screenshot**

##### **Activity-1**

**Creating Developer Account**

**Creating a developer org in salesforce.**

- 1. Go to [developers.salesforce.com/](https://developer.salesforce.com/)**
- 2. Click on sign up.**
- 3. On the sign-up form, enter the following details:**
  - 1. First name & Last name**
  - 2. Email**
  - 3. Role: Developer**
  - 4. Company: College Name**
  - 5. County: India**
  - 6. Postal Code: pin code**
  - 7. Username: should be a combination of your name and company**  
**This need not be an actual email id; you can give anything in the format:**  
**username@organization.com**



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**Click on sign up after filling these.**

The screenshot shows the Salesforce sign-up page with the URL developer.salesforce.com/signup?d=70130000000rd6N. The page has a blue header with the text "bring your ideas to life". On the left, there's a sidebar with a blue background and white text listing features: "Build apps fast with drag and drop tools", "Customize your data model with clicks", "Go further with Apex code", "Integrate with anything using powerful APIs", "Stay protected with enterprise-grade security", and "Customize UI with clicks or any leading-edge web framework". The main form on the right contains the following fields:

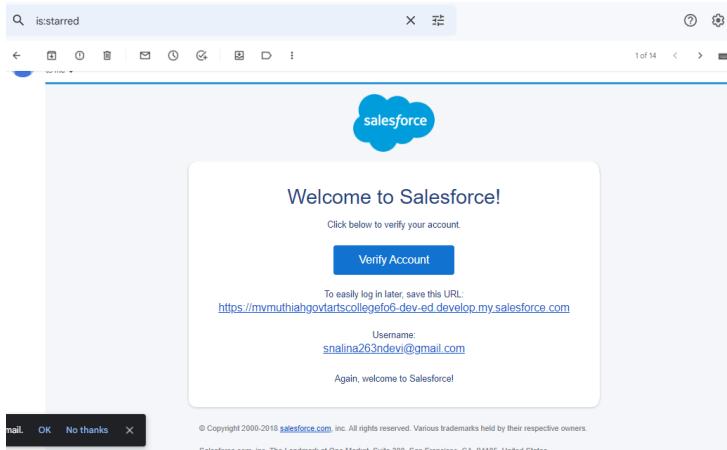
- First Name\*: Nalina
- Last Name\*: devi
- Email\*: snalina263@gmail.com
- Role\*: Developer
- Company\*: M.V.Muthiah Government Arts College for women
- Country/Region\*: India
- Postal Code\*: 624001
- Username\*: snalina263@gmail.com

Below the form, there's a note: "Your username must be in the form of an email address (it does not have to be real). It must be unique and cannot be associated with another Salesforce login credential. [Read more about username recommendations.](#)" There's also a checkbox for "I agree to the Main Services Agreement – Developer Services and [Salesforce Privacy Statement](#)".

## 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 5-10mins, as**

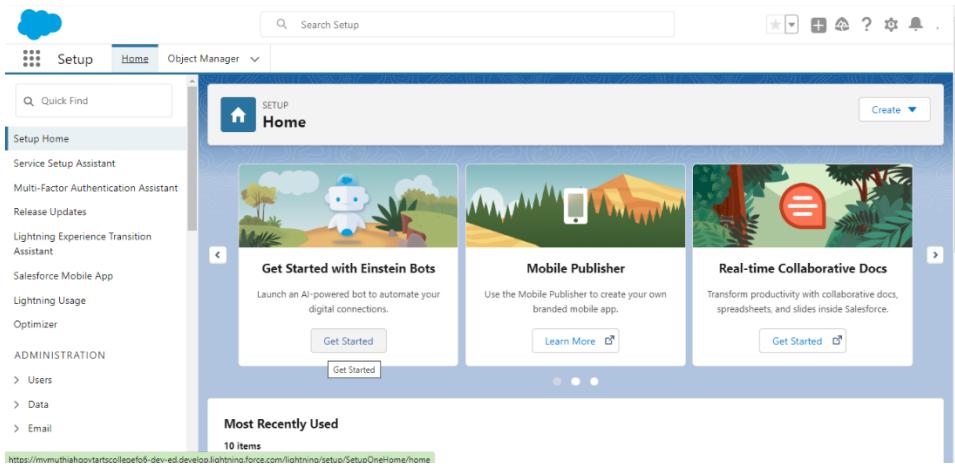


## Login To Your Salesforce Account

- 1.Go to salesforce.com and click on login.**
- 2.Enter the username and password that you just created.**
- 3.After login this is the home page which you will see.**



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## Salesforce Login

<https://login.salesforce.com>

## Milestone-2 Objects:

**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**

### Objects involved in retail management

Application	Object	Description
Sales app	Campaign	We do promotions by using this object
	Leads	We capture leads here
	Accounts	We capture customer data
	Contacts	Employees data of customer
	Opportunities	SMB sales order 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



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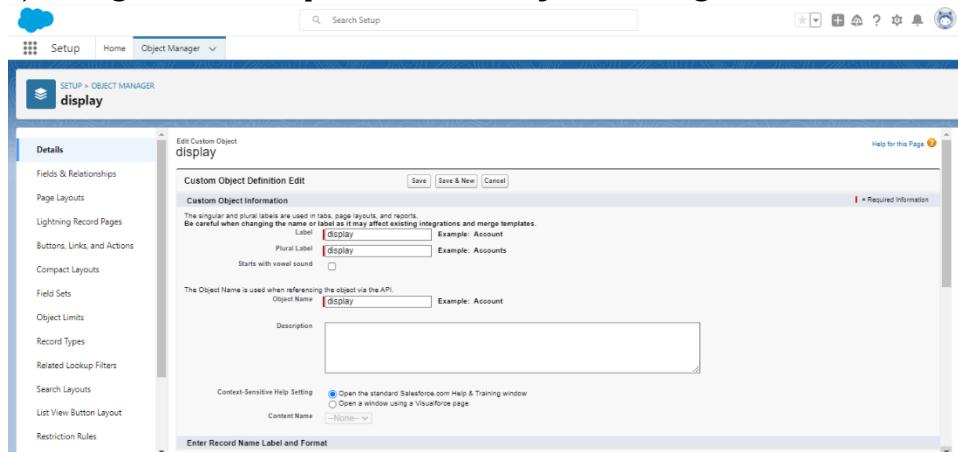
	<b>Dispatch/tracking</b>	<b>Orders dispatch related info will be stored here</b>
--	--------------------------	---

<b>Application</b>	<b>objects</b>	<b>Description</b>
<b>Service app</b>	<b>Cases</b>	<b>Historical problems of customer will be stored here</b>
	<b>Accounts</b>	<b>We capture customer data</b>

## Activity-1

### Creation of object Dispatch/Tracking

#### 1) Navigate to setup and select object manager.



#### 2) At the top of the right side there you can find create custom object.

#### 3) You will navigate to custom object definition edit where you have to give the object name.

#### 4) The label name has Display/tracking and Plural label has Display/trackings.

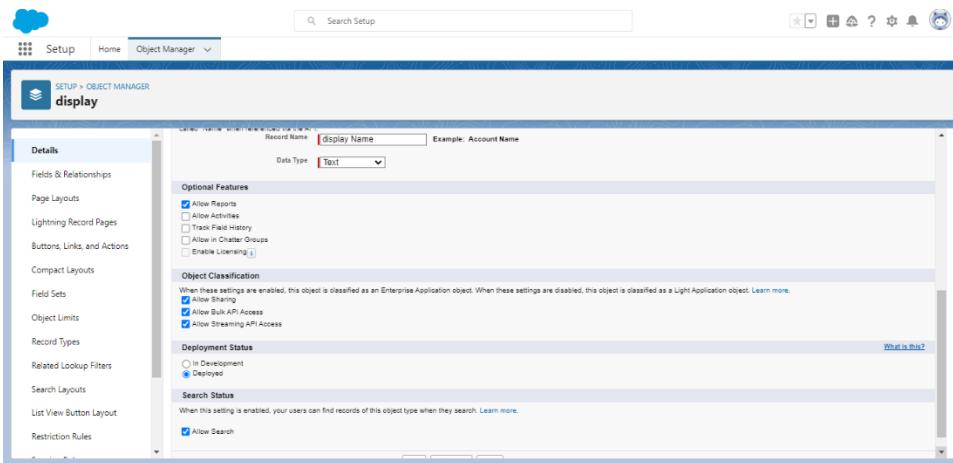
#### 5) In enter record name label and format enter name record name has Tracking ID.

#### 6) And the data type has text.

#### 7) In deployment status select deployed option.



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**8) Ensure that you have to select at least one option in the object creation option; it is**

**available only once when a custom object is created.**

**9) Then click on next you will navigate to the new custom object tab where you have to**

**select tab style and click on next.**

**10) After tab selection you will be navigated to add to profiles select default on click on next.**

**11) Thereafter you have to select a custom app select include tab so that object will be**

**available in all objects and select save option.**

## **Activity-2 Fields available on Dispatch/tracking**

**1) Dispatched**

**2) Expected date of delivery**

**3) Tracking Id**

**4) Sales order**

### **Creation of fields on Dispatch/tracking**

**1) Select your object from object selection has Dispatch/Tracking.**



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**2) And select the option fields and relationships.**

**3) At the top right side you can find a new select that option**

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
dispatched	dispatched__c	Checkbox		
dispatched Name	Name	Text(80)		
Last Modified By	LastModifiedById	Lookup(User)		
sales order	sales_order__c	Master-Detail(sales order)		

**4) Now you have to select data type, Checkbox Has data type.**



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**5) And you will navigate to enter the details page where you give the field label.**

**6) And give the label name has Dispatched**

**7) At the bottom of the object you can find options like required, unique, external id select**

**required option so that always require a value in this field to save.**

**8) Click next you will navigate to field level security click on visible checkbox so that it is**

**visible to all profiles.**

**9) Select the next option, select the page layout and save it.**

### **Milestone-3 Relationship b/w objects:**

**It's time to take things to the next level with object relationships. Object relationships are special**

**field types that connect two objects. As a com product owner create relationships to link objects**

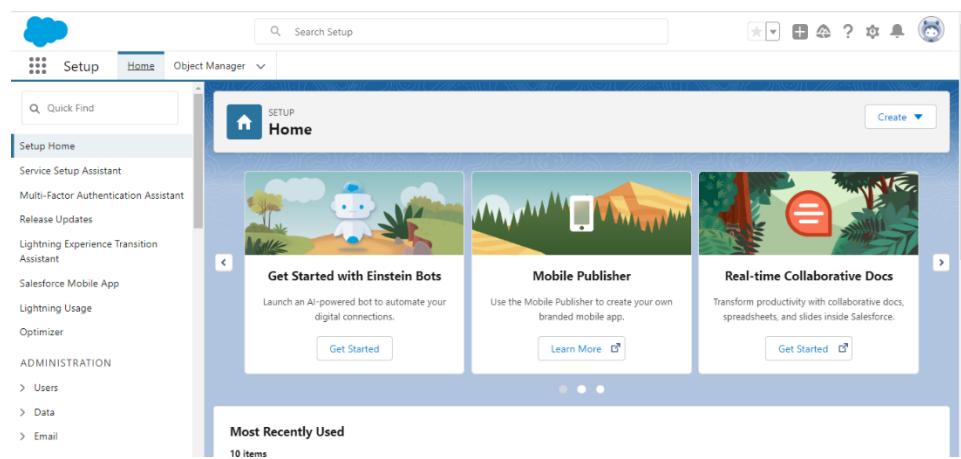
**with each other, so that when users view records, they can also see related data.**

### **Activity-1:**

#### **Creation of relationships between objects**

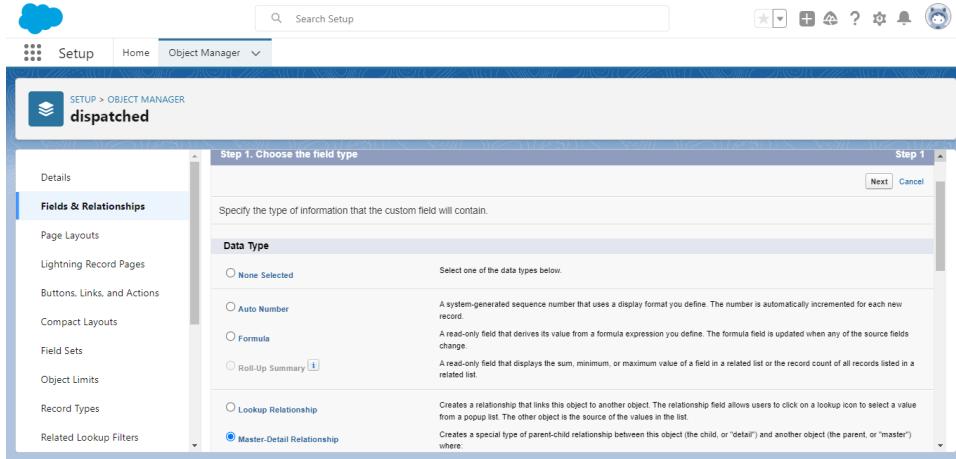
**To create a Master Detail relationship between Dispatch/tracking and sales order.**

**1) Go to the Set Up option from the Home Page and click on it.**



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- 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 has Master detail relationship**



- 5) And select related to the object has 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.**
- 7) Select visible for all profiles in field level security and select page layout in next page and save it.**

### **Milestone-4 Application:**

**Apps in Salesforce are a group of tabs that help the application function by working together as a unit. It**

**has a name, a logo, and a particular an app is a collection of items that work together to serve a**

**function. Salesforce apps come in two flavors: Classic and Lightning.**

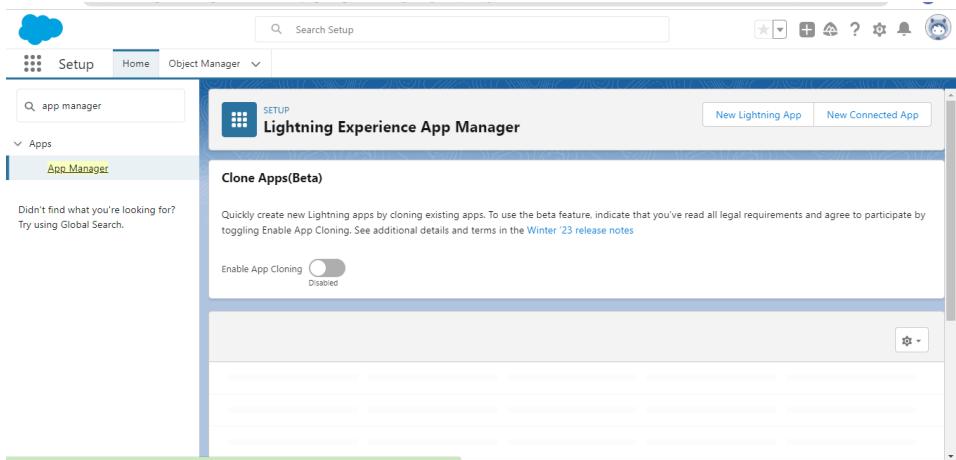
### **Activity-1**

#### **Creation of Application**

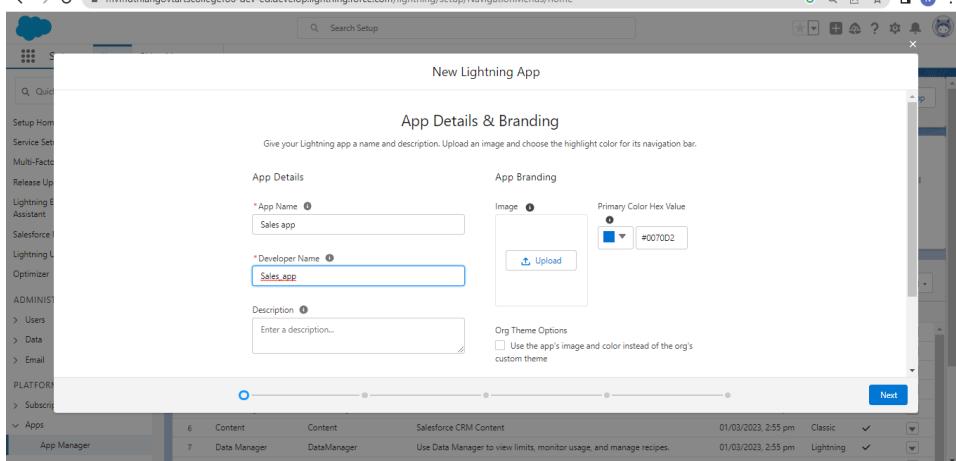
- 1) Navigate to setup and search for app manager**



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## 2) And select an option for a new lightning app.

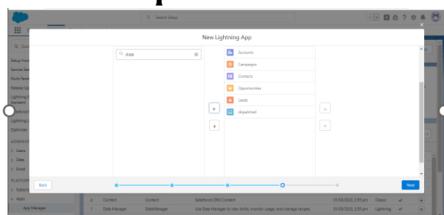


3) Give the app name has sales app

4) Upload the picture and click next.

5) Choose the app option as navigation style- standard navigation, support from factors-desktop & mobile and select next. 4) Upload the picture and click next.

5) Choose the app option as navigation style- standard navigation, support factors-desktop & mobile and select next.



6) And move the objects from available items to selected items.



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7)

**Accounts, contacts, opportunities, Leads, warehouse, dispatch/tracking, campaign to**

**selected items.**



## **Milestone-5 Layouts:**

**Page layouts control the layout of an object. As a crm product owner create custom page layouts**

**which defines which fields the user can view and edit while entering data in objects. And must**

**contain different sets of fields and related lists.**

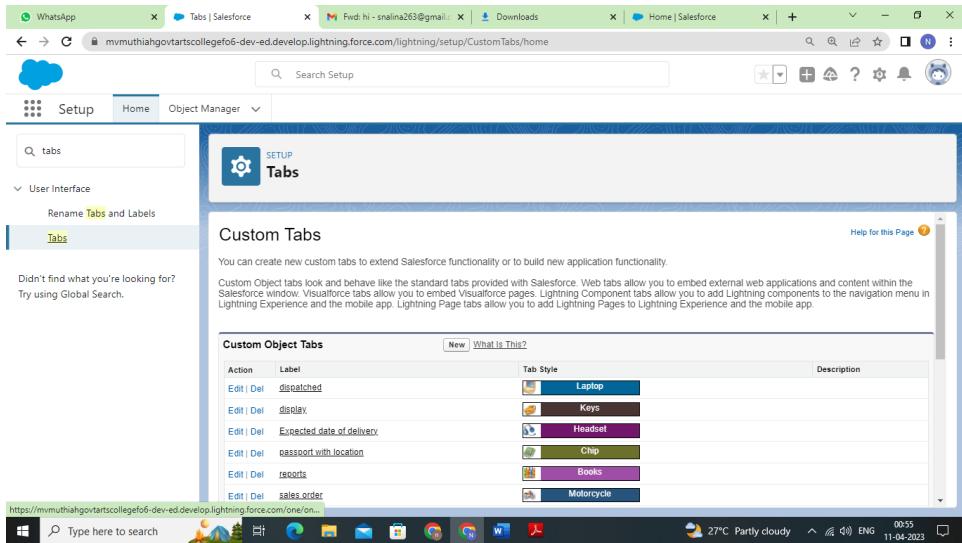
## Custom Page layouts

- 1) Warehouse page layout
  - 2) Sales order layout
  - 3) Dispatch/Tracking layout

## **Activity-1:**

## **Creation of custom Tabs**

- 1) Now create a custom tab. 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.



**5) Leave all defaults as is. Click Next, Next, and Save**

**6) In the same way create other objects such as students and parents.**

## Milestone-6 User:

**So, what is a user? A user is anyone who logs in to Salesforce. Users are employees at your**

**company, such as sales reps, managers, and IT specialists, who need access to the company's**

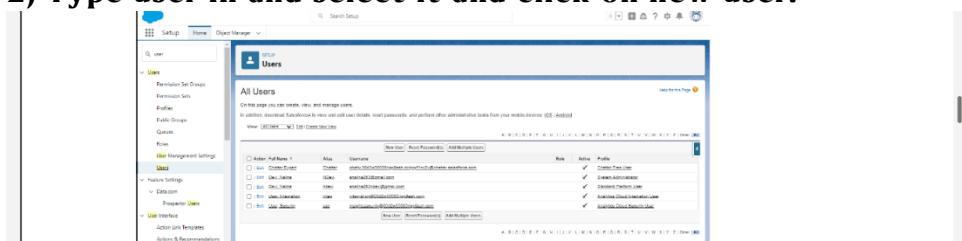
**records. Every user in Salesforce has a user account**

### Activity-1:

#### Creation of user

**1) Navigate to setup in quick find search bar**

**2) Type user in and select it and click on new user.**



**3) Give the first name and last name.**

**4) Enter your email in the email field.**

**5) Enter username; it must be unique.**



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- 6) Select the user license of salesforce.**
- 7) In the profile field select standard platform profile.**
- 8) At the bottom of the page check the box to generate a new password and notify the user immediately.**

## **Milestone-7 Validation Rules:**

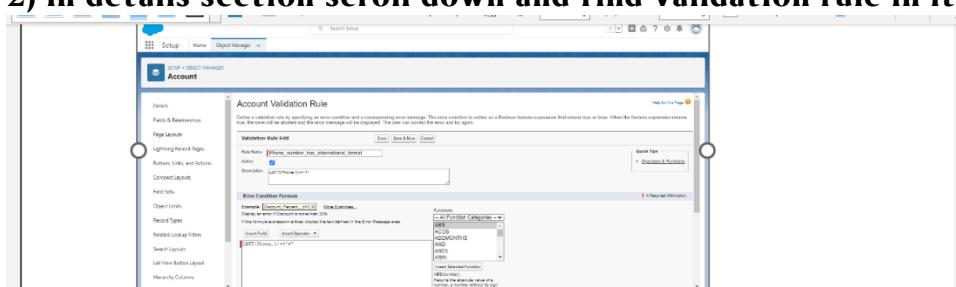
**Validation rules verify that the data a user enters in a record meets the standards you specify**

**before the user can save the record. As a crm product owner they requested to create a validation rule on account object on the phone field.**

### **Activity-1:**

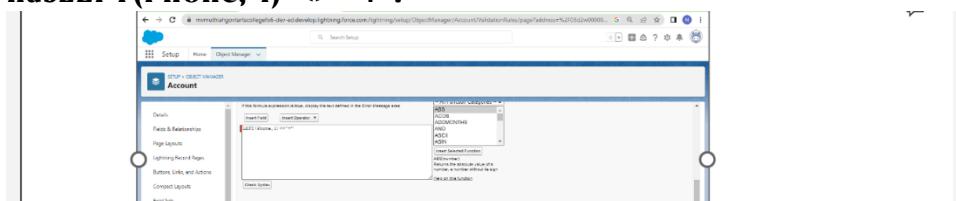
**Creation of validation rule**

- 1) Navigate to object manager and select Account object.**
- 2) In details section scroll down and find validation rule in it.**



- 3) Click new, give the label name and in edit error conditional formula give the formula**

**hasLEFT(Phone, 1) <> "+".**



- 4) And in error message give the description has Phone number must begin with + (country code).**



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**5) In error location select top of the field.**



## Activity-2:

### Cross Object Formula

**Using an object formula lets you reference merge fields on a master object from a master detail**

**relationship on the detail object. As a crm product owner they wants to save user's clicks and**

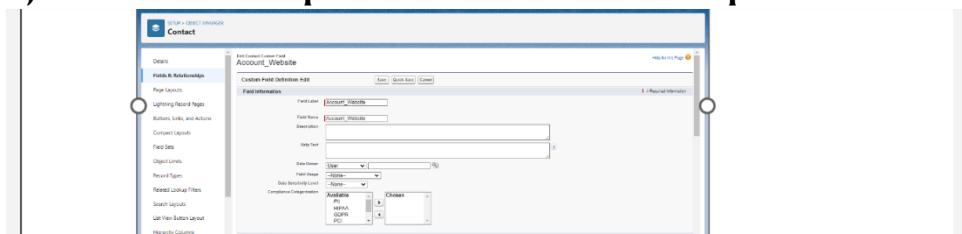
**displays contacts' parent accounts website value on the contact record so users do not have to**

**click on the account to find the website.**

### Creation of cross object

**1) Select your object from object selection has Contact.**

**2) And select the option fields and relationships.**



**3) At the top right side you can find a new select that option.**

**4) Now you have to select data type, formula Has data type.**

**5) And you will navigate to enter the details page where you give the field label.**

**6) And give the label name has Account Website**

**7) In the formula field enter this formula Account. Website**

**8) At the bottom of the object you can find options like required, unique, external id select**

**required option so that always require a value in this field in order to save.**

**9) Click next you will navigate to field level security click on visible checkbox so that it is**



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**visible to all profiles.**

**10) Select the next option, select the page layout and save it.**

## **Milestone-7 Reports :**

**A report is a list of records that meet the criteria you define. It's displayed in Salesforce in rows**

**and columns, and can be filtered, grouped, or displayed in a graphical chart. Every report is**

**stored in a folder. Folders can be public, hidden, or shared, and can be set to read-only or**

**read/write.**

## **Activity:**

### **Creation of report**

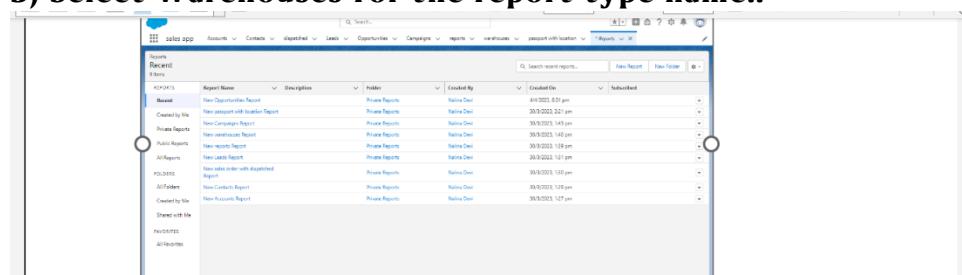
**Note- While creation of report ensure that update preview automatically is selected which is**

**available at the right side of the report page.**

**1) Click on the app launcher and search for reports.**

**2) And select a new report, for the record type category select other reports.**

**3) Select Warehouses for the report type name..**



**4) Select the start button to create a new report.**

**5) At the left side of the report you can find an outline pane.**

**6) In the group rows select Product name.**

**7) And in columns warehouse:warehouse name and stock available.**

**8) Now navigate to the filter pane available next to the outline pane and ensure in the show me section all my warehouses is selected**

**me section all my warehouses is selected.**

**9) And in the warehouse created date select all time. 10) And give the label**



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**name products with stock availability.**

**11) Click on save and run for saving the report.**

## **Milestone-8 Dashboards:**

**Dashboards in Salesforce are a graphical representation of Reports. It shows data from source**

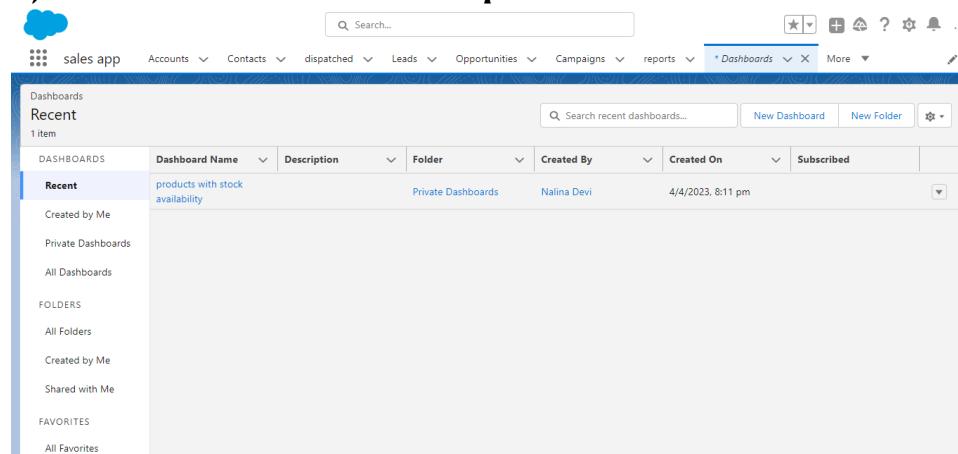
**reports as visual components.**

## **Activity**

### **Creation of Dashboard**

**1) Click on the app launcher and search for dashboards.**

**2) Select the new dashboard option.**



The screenshot shows the Salesforce Dashboards page. At the top, there's a navigation bar with various tabs like Accounts, Contacts, Leads, Opportunities, Campaigns, reports, and Dashboards. Below the navigation is a search bar labeled "Search...". The main area is titled "Dashboards" and shows a "Recent" section with one item. The dashboard details are as follows:

DASHBOARD	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	products with stock availability		Private Dashboards	Nalina Devi	4/4/2023, 8:11 pm	

On the left side, there are sidebar categories: Dashboards (Recent, Created by Me, Private Dashboards, All Dashboards), Folders (All Folders, Created by Me, Shared with Me), and Favorites (All Favorites).

**3) Name the**

**dashboard has a products with stock availability.**

**4) And select create option.**

**5) Now click on Add component and for report select passport with locations.**

**6) Select the donut chart in display as section**

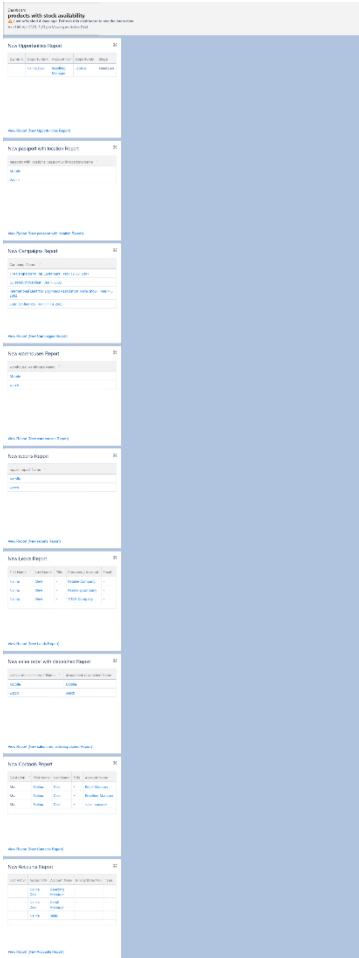
**7) Ensure that value is record count and sliced by product name.**

**8) Leave the default values.**

**9) Click on add.**



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10) And save the dashboard.

#### 4.Trailhead profile public URL

Team Lead-<https://trailblazer.me/id/hgahlot3>

Team Member1-

Team Member2-

Team Member3-

#### 5.ADVANTAGES&DISADVANTAGE

##### ADVANTAGES

Retail management saves time and ensures the customers easily locate their desired merchandise and return home satisfied.

- The retailer must keep a record of all the products coming into the store.
- The products must be well arranged on the assigned shelves according to size, colour, gender, pattern etc..



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## **DISADVANTAGE**

- **Expensive**
- **You must pay for add-ons to get the most out of the software.**
- **Configuration and setup are complex and time-consuming.**
- **Cluttered interface makes navigation and simple tasks unnecessarily complex.**
- **The learning curve never seems to end.**

## **6. APPLICATIONS**

**Information technology is the enabler in the retail industry. It improves the customer experience and offers a personalized buying experience to customers. It also speeds up the processes and increases sales. As well as improves the customer retention rate, and offers cost-saving benefits to the company.**

## **7. CONCLUSION**

**Salesforce is one of the most popular sales automation platforms on the market, and for good reason. It provides retailers with a comprehensive solution that can help them automate their sales processes, track customer data, and create powerful marketing campaigns. With Salesforce, retailers can maximize their efficiency and productivity while improving customer engagement.**

## **8 .FUTURE SCOPE**

**According to Statistics, the requirement for database administrators, especially Salesforce administrators, is anticipated to increase by 11% by 2026. The scope and opportunities for a Salesforce administrator have grown as a result of their undeniable role in carrying out a successful business.**



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