


RETAIL MANAGEMENT APPLICATION USING SALESFORCE

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Team Size: 4

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Retail Management Application Using Salesforce

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 to 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.

Milestone-1 :

Introduction

Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don't know where 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:

<https://youtu.be/r9EX3IGde5k>

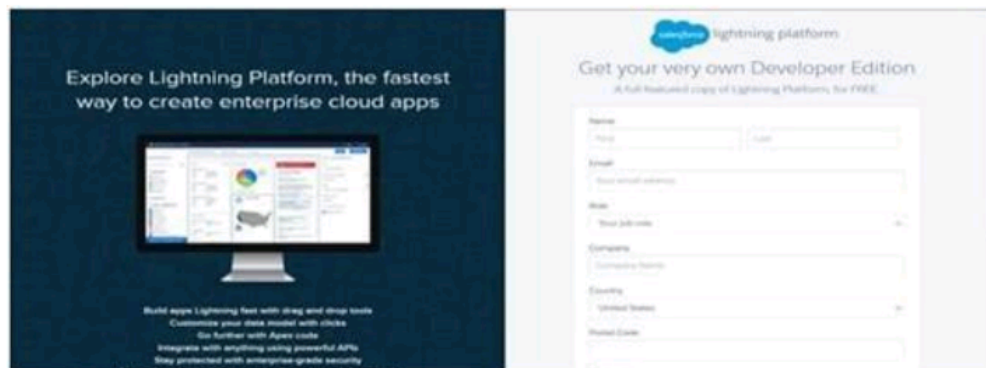
Activity-1

Creating Developer Account

Creating a developer org in salesforce.

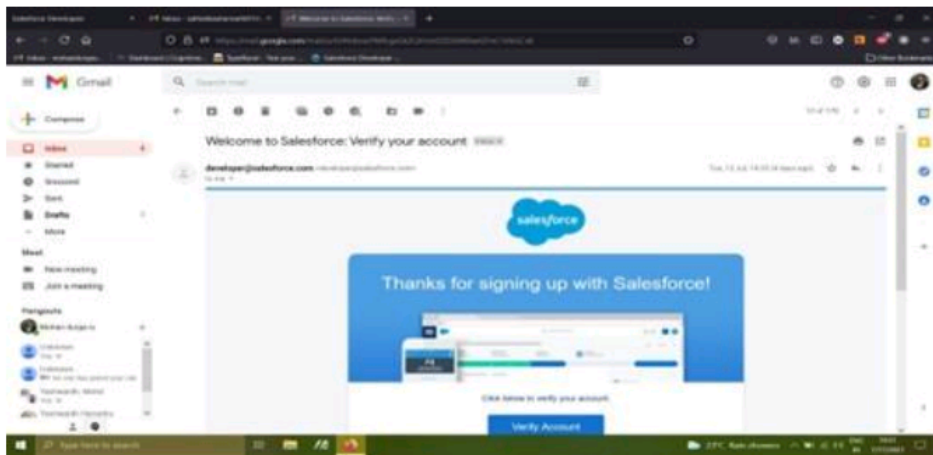
1. Go to developers.salesforce.com/
2. Click on sign up.
3. On the sign up form, enter the following details :
 - 1.First name & Last name
 - 2.Email
 3. Role : Developer
 4. Company : College Name
 5. County : India
 6. Postal Code : pin code
 7. Username : should be a combination of your name and company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

Click on sign up after filling these.



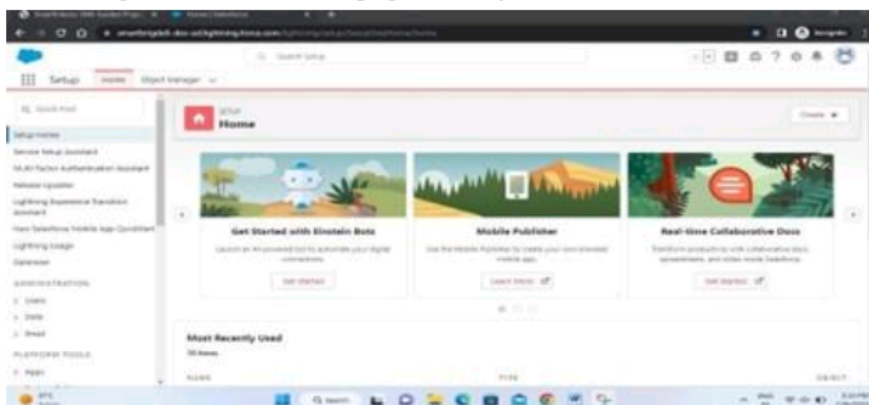
Account Activation

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.



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 are

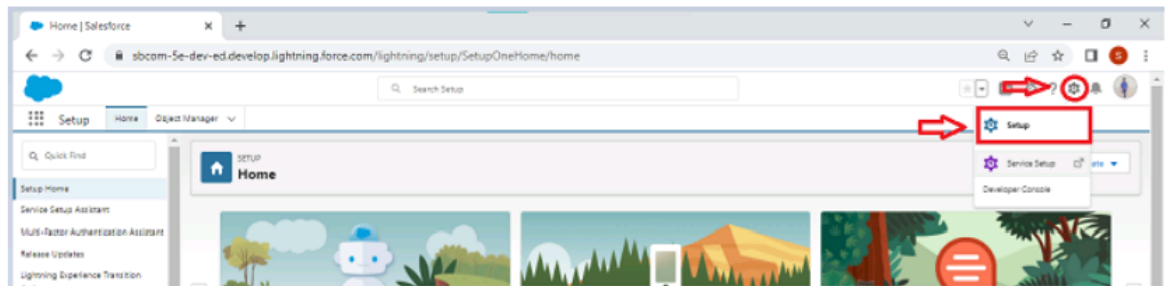
Application	Object	Description
Sales app	Campaign	We do promotions by using this object
	Leads	We capture leads here
	Accounts	We capture customers data
	contacts	Employees data of customer
	opportunities	SMB sales orders data
	products	Here we store product details i.e electronic types
	Warehouse	We 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

Activity-1

Creation of object Dispatch/Tracking

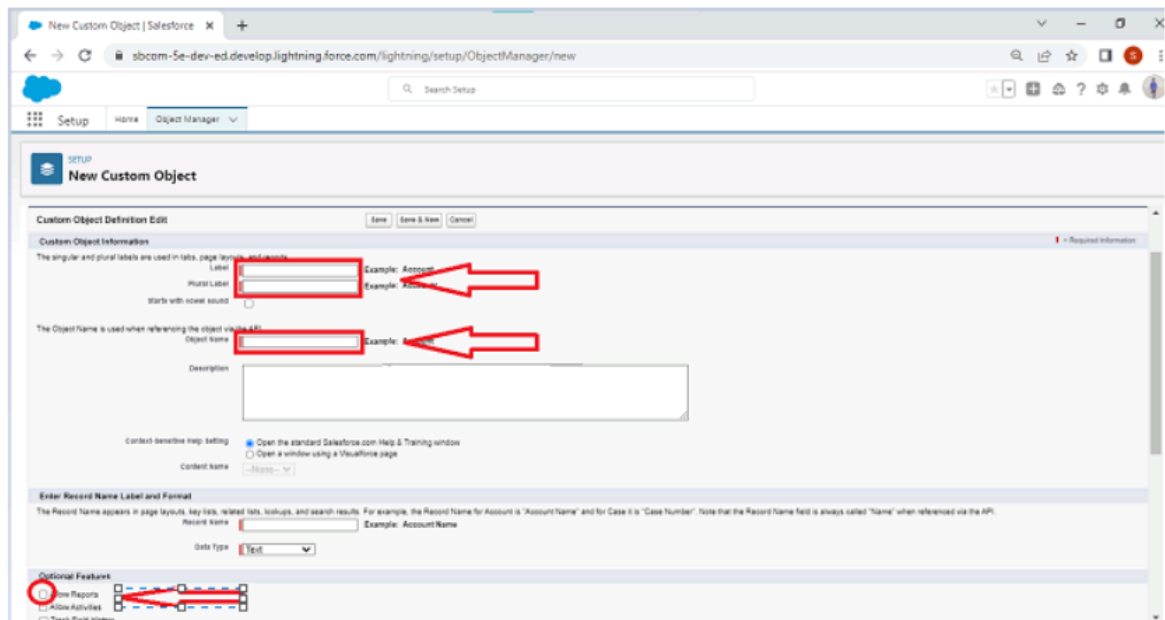
- 1) Navigate to setup and select object manager.



- 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.

The screenshot shows the 'Optional Features' section with the following settings:

- ☒ Allow Reports
- ☐ Allow Activities
- ☐ Track Field History
- ☐ Allow in Chatter Groups
- ☐ Enable Licensing

The 'Object Classification' section shows:

- ☒ Allow Sharing
- ☒ Allow Bulk API Access
- ☒ Allow Streaming API Access

The 'Deployment Status' section shows:

- ☐ In Development
- ☒ Deployed

The 'Search Status' section shows:

- ☒ Allow Search

The 'Object Creation Options' section shows:

- ☐ Add Notes and Attachments related list to default page layout
- ☐ Launch New Custom Tab Wizard after saving this custom object

At the bottom, there are buttons: 'Save', 'Save & Next', and 'Cancel'. Red arrows point to the 'Save & Next' button and the 'Allow Search' checkbox.

- 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.

The screenshot shows the 'New Custom Object Tab' wizard with the following details:

- Step 1: Enter the Details.**
- Choose the custom object for this new custom tab. Fill in other details.**
- Select an existing custom object or create a new custom object.**
 - Object: (Red arrow points to this dropdown)
 - Tab style: (Red arrow points to this dropdown)
- (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: (Red arrow points to this dropdown)
- Enter a short description.**
 - Description:

At the bottom right, there are buttons: 'Next' and 'Cancel'. A red arrow points to the 'Next' button.

- 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.

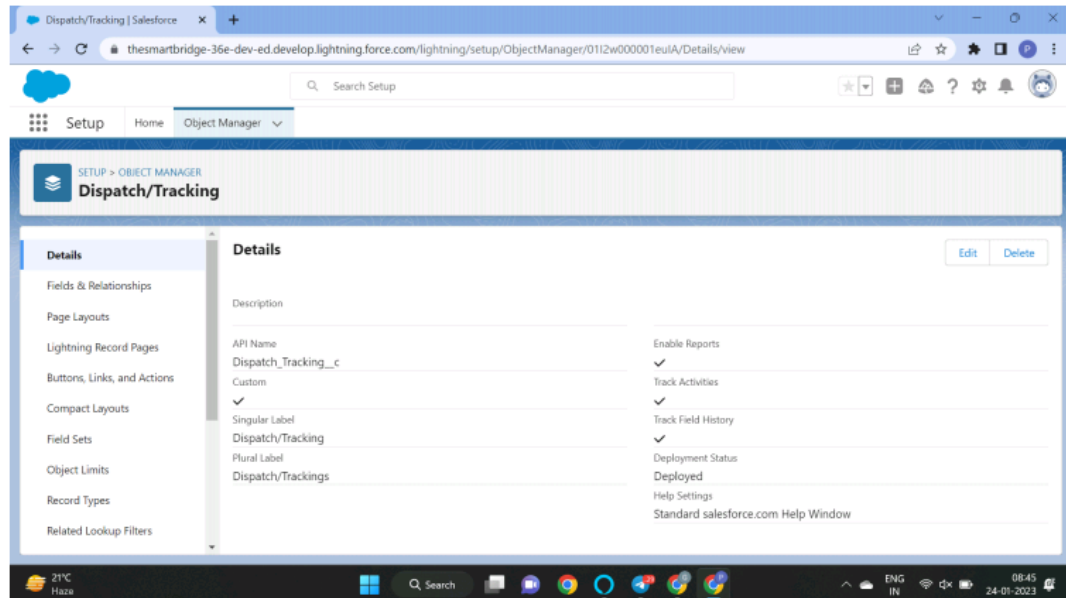
Activity-2 Fields available on Dispatch/tracking

- 1) Dispatched

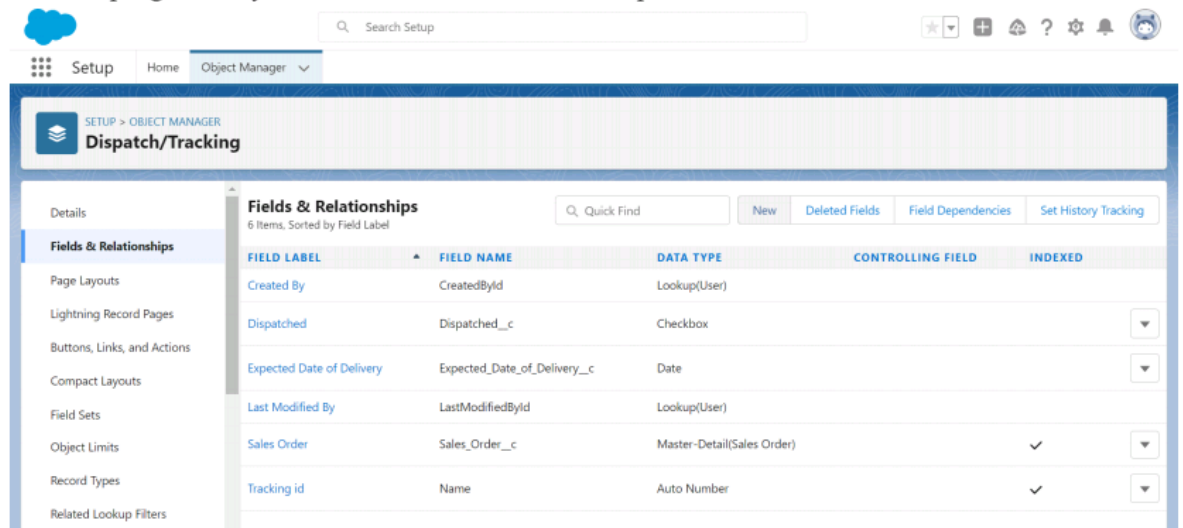
- 2) Expected date of delivery
- 3) Tracking Id
- 4) Sales order

Creation of fields on Dispatch/tracking

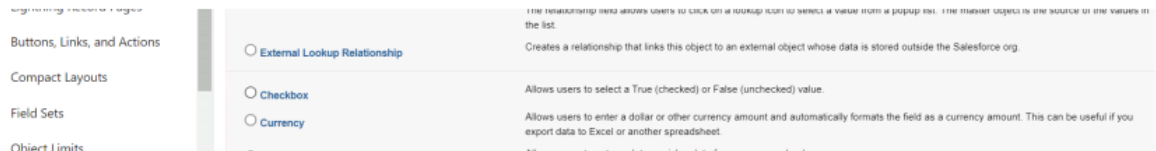
- 1) Select your object from object selection has Dispatch/Tracking.



- 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, Checkbox 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 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 in order 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:

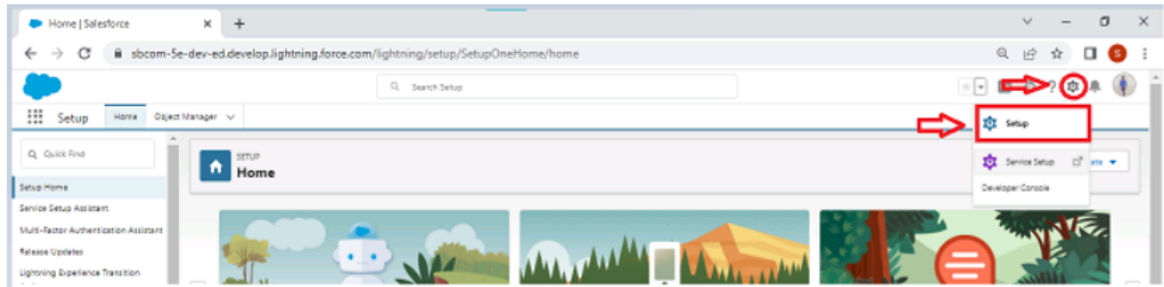
It's time to take things to the next level with object relationships. Object relationships are special field types that connect two objects. As a crm product owner create relationships to link objects with each other, so that when users view records, they can also see related data.

Activity-1:

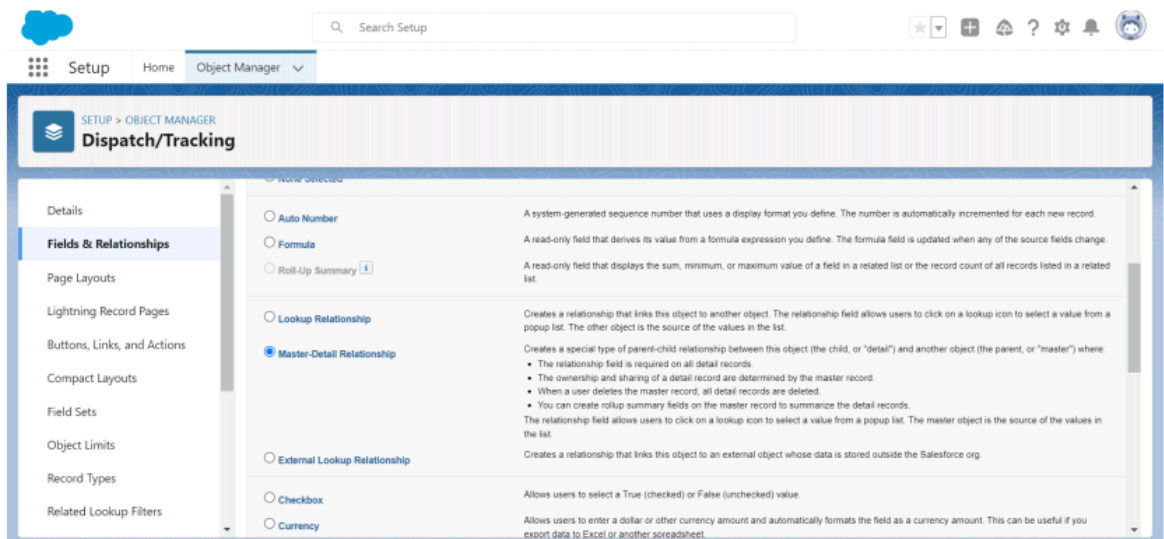
Creation of relationships between objects

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.



- 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.

The screenshot shows the Salesforce Setup interface for configuring the 'Dispatch/Tracking' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Dispatch/Tracking' and includes a 'Master-Detail Options' section. In this section, 'Related To' is set to 'Sales Order', 'Child Relationship Name' is 'Dispatch_Trackings', and 'Related List Label' is 'Dispatch/Trackings'. The 'Sharing Setting' is 'Read/Write', which allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records. The 'Allow reparenting' checkbox is unchecked. Below this is a 'Lookup Filter' section with a link to 'Show Filter Settings'. At the bottom of the main content area are buttons for 'Change Field Type', 'Save', and 'Cancel'.

Setup > OBJECT MANAGER
Dispatch/Tracking

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

GDPR
PCI

Master-Detail Options

Related To: Sales Order Child Relationship Name: Dispatch_Trackings

Related List Label: Dispatch/Trackings

Sharing Setting: Select the minimum access level required on the Master record to create, edit, or delete related Detail records:
☐ Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.
☒ Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.

Allow reparenting: ☐ Child records can be reparented to other parent records after they are created

Lookup Filter

Optionally, create a filter to limit the records available to users in the lookup field. [Tell me more!](#)
[Show Filter Settings](#)

Change Field Type Save Cancel

- 7) Select visible for all profiles in field level security and select page layout in next page and save it.

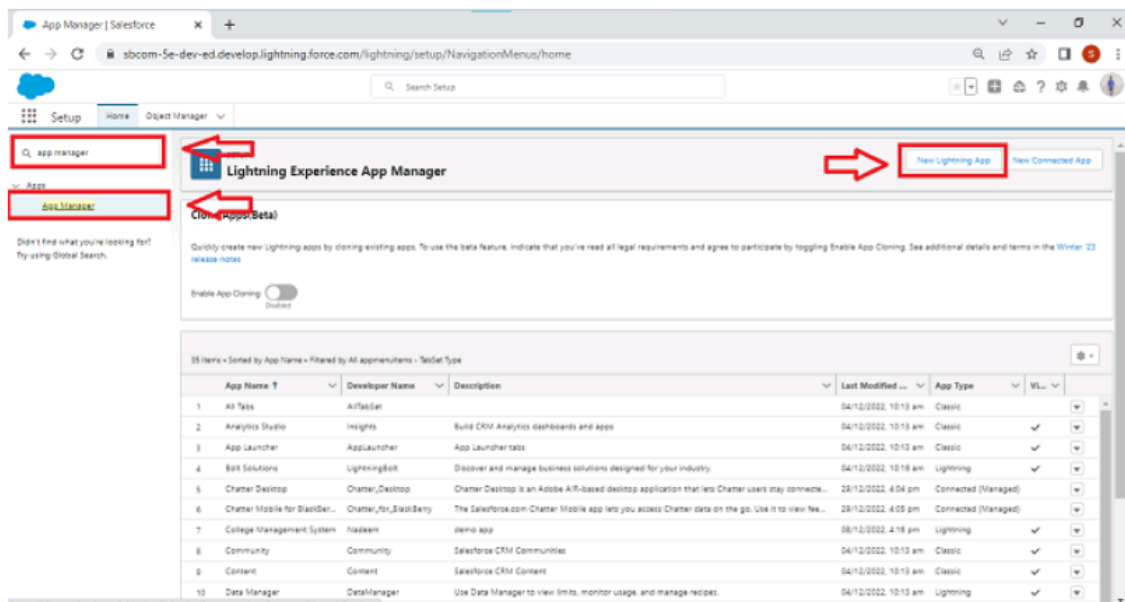
Milestone-4 Application:

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

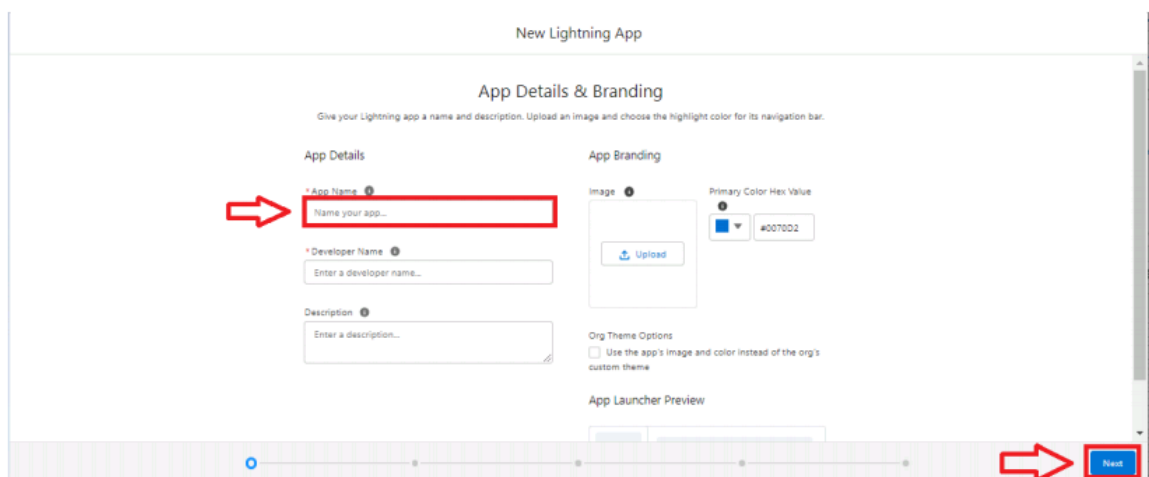
Activity-1

Creation of Application

- 1) Navigate to setup and search for app manager

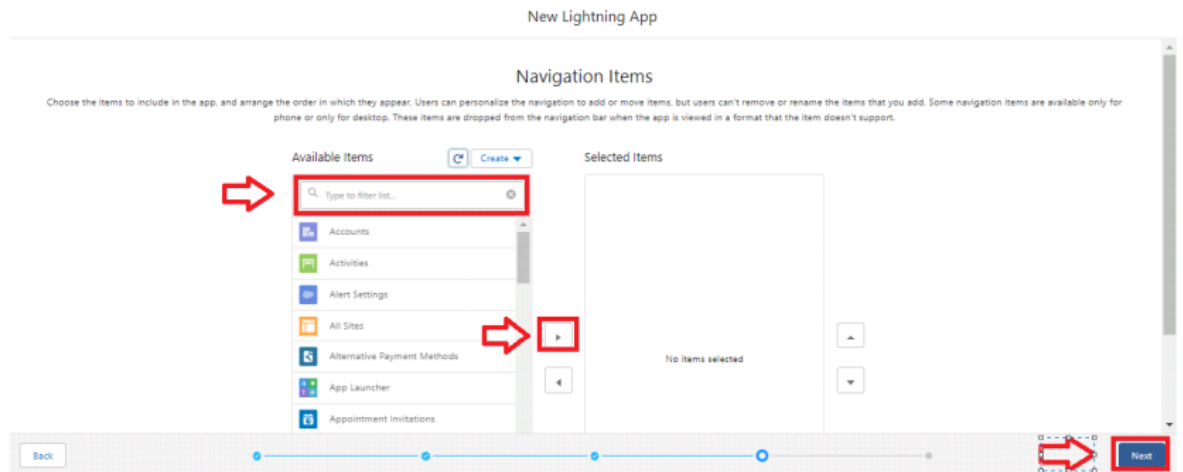


- 2) And select an option for a new lightning app.

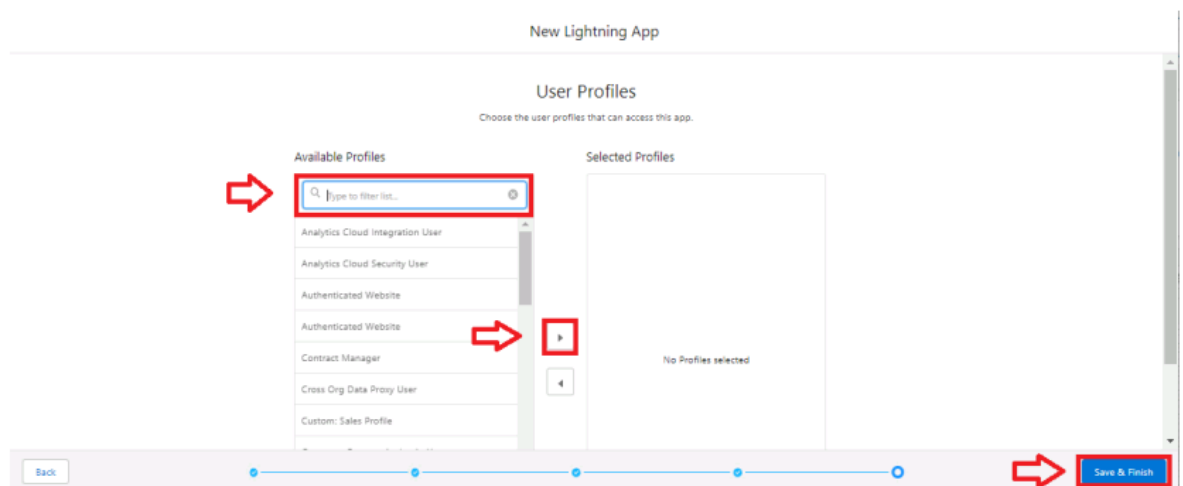


- 3) Give the app name has sales app.

- 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.



- 6) And move the objects from available items to selected items.
- 7) Accounts,contacts,opportunities,Leads,warehouse,dispatch/tracking,campaign to selected items.
- 8) And system admin profile to available items 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.

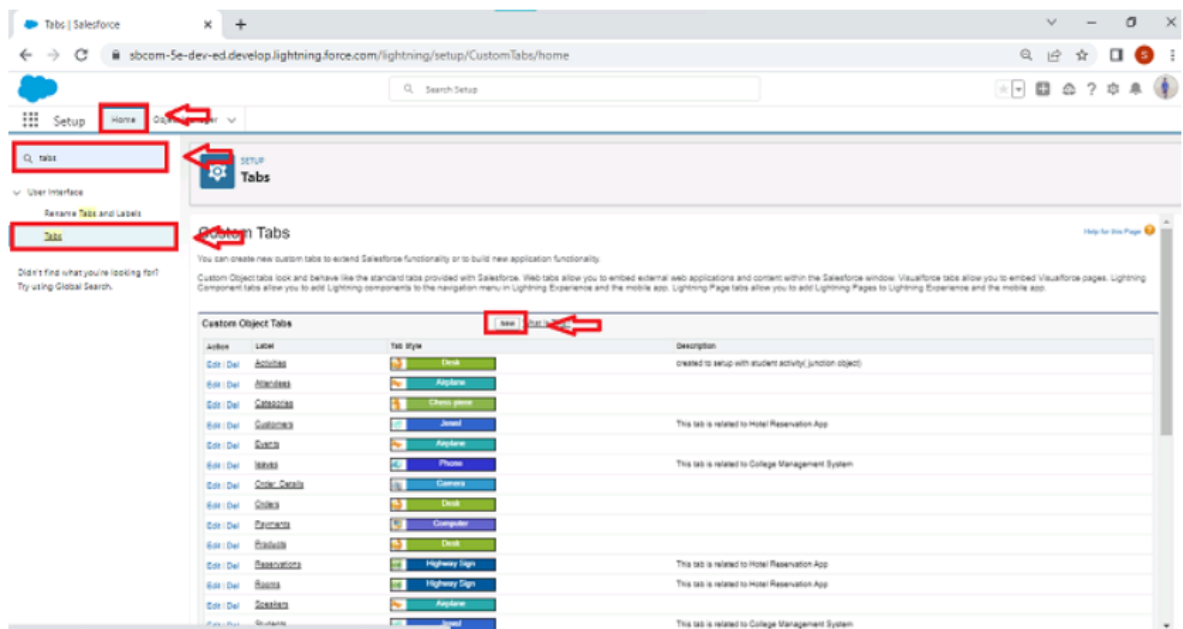
Custom Page layouts

- 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.

- 3) Give the first name and last name.
- 4) Enter your email in the email field.
- 5) Enter username; it must be unique.
- 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.

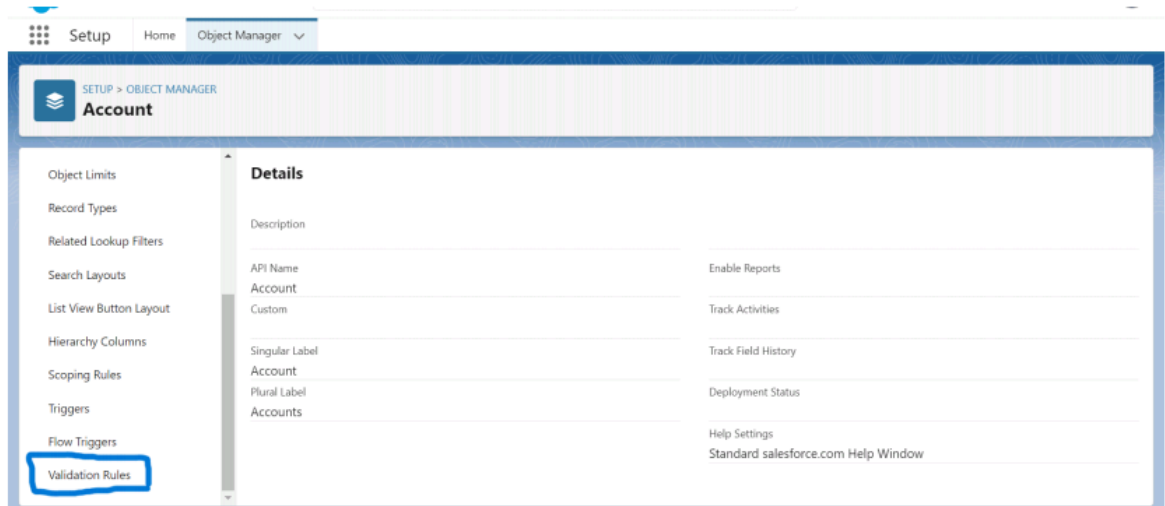
Milestone-7 Validation Rules:

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.

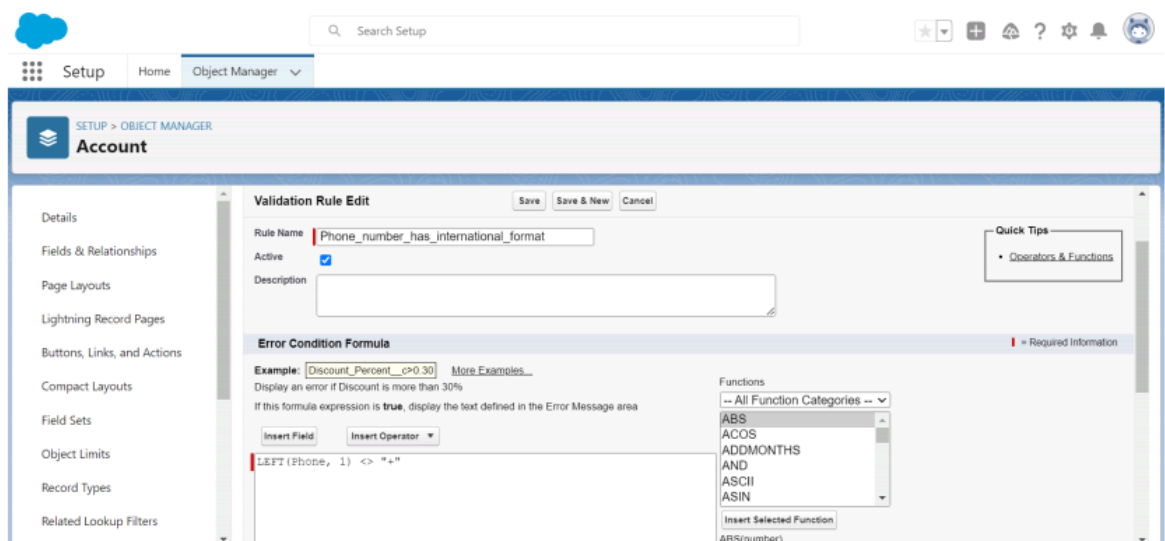
Activity-1:

Creation of validation rule

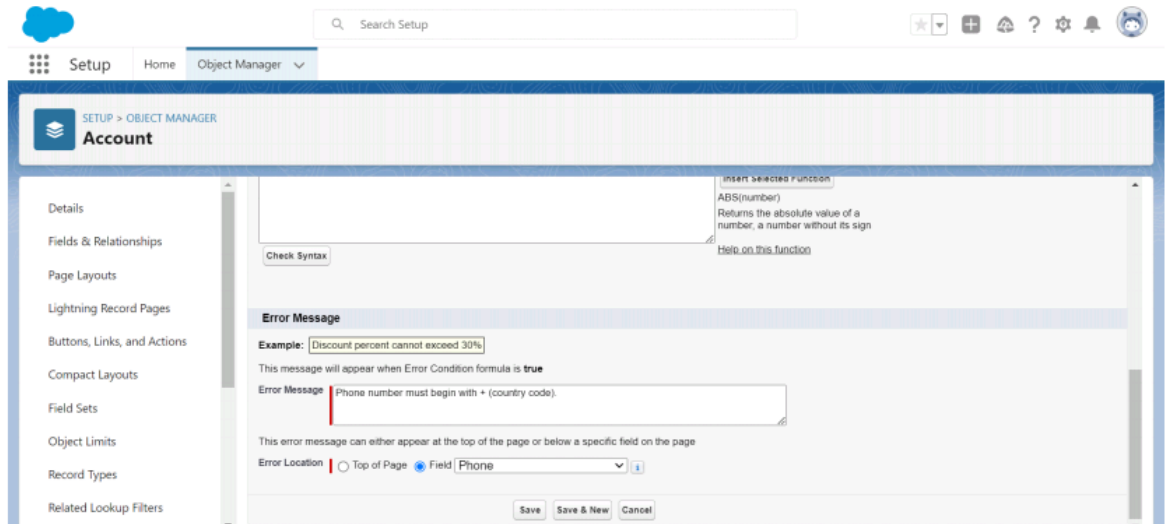
- 1) Navigate to object manager and select Account object.
- 2) In details section scroll down and find validation rule in it.



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



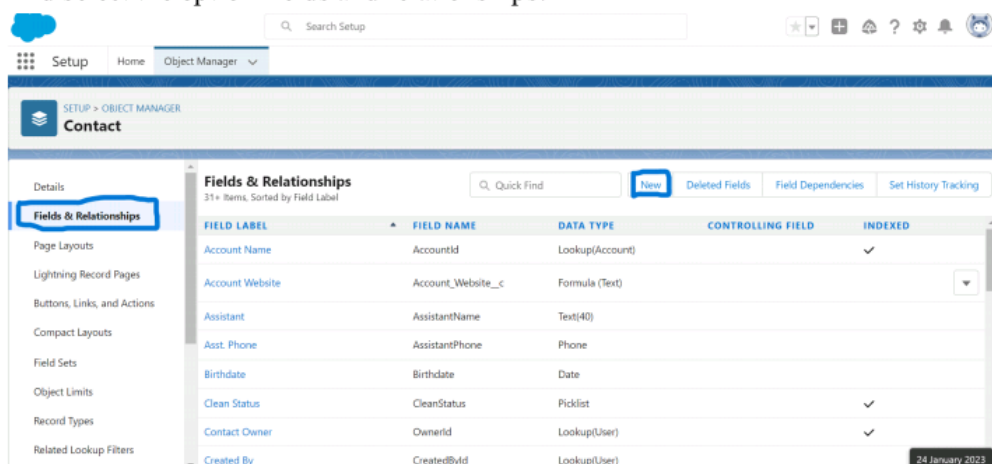
Activity-2 :

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.

SETUP > OBJECT MANAGER
Contact

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions

Data Type

☐ None Selected Select one of the data types below.

☐ Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

☒ 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.

- 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.

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

Custom Field Definition Edit Save Quick Save Cancel

Field Information ⓘ Required Information

Field Label Account Website

Field Name Account_Website

Description

Help Text ⓘ

Data Owner User

Field Usage --None--

Data Sensitivity Level --None--

Compliance Categorization Available Chosen

PII
HIPAA
GDPR

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

Custom Field Definition Edit Save Quick Save Cancel

Field Information ⓘ Required Information

Field Label Account Website

Field Name Account_Website

Description

Help Text ⓘ

Data Owner User

Field Usage --None--

Data Sensitivity Level --None--

Compliance Categorization Available Chosen

PII
HIPAA
GDPR

Simple Formula Advanced Formula

Example: Full Name = LastName & ", " & FirstName More Examples

Insert Field

Account Website (Text) =

Account.Website

Insert Operator

Functions

-- All Function Categories --

ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN

Insert Selected Function

- 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 visible to all profiles.
- 10) Select the next option, select the page layout and save it.

Milestone-7 Reports :

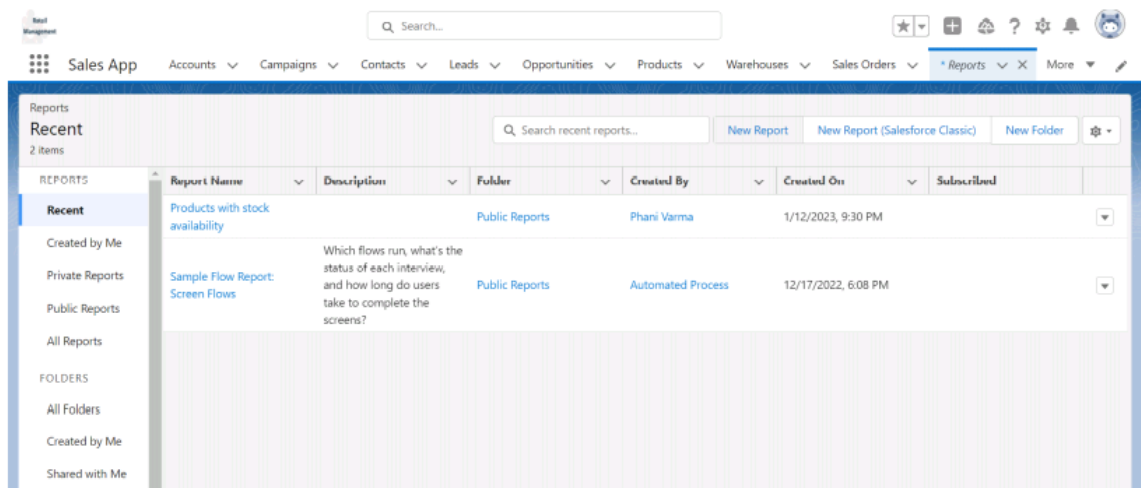
A report is a list of records that meet the criteria you define. It's displayed in Salesforce in rows and columns, and can be filtered, grouped, or displayed in a graphical chart. Every report is stored in a folder. Folders can be public, hidden, or shared, and can be set to read-only or read/write.

Activity:

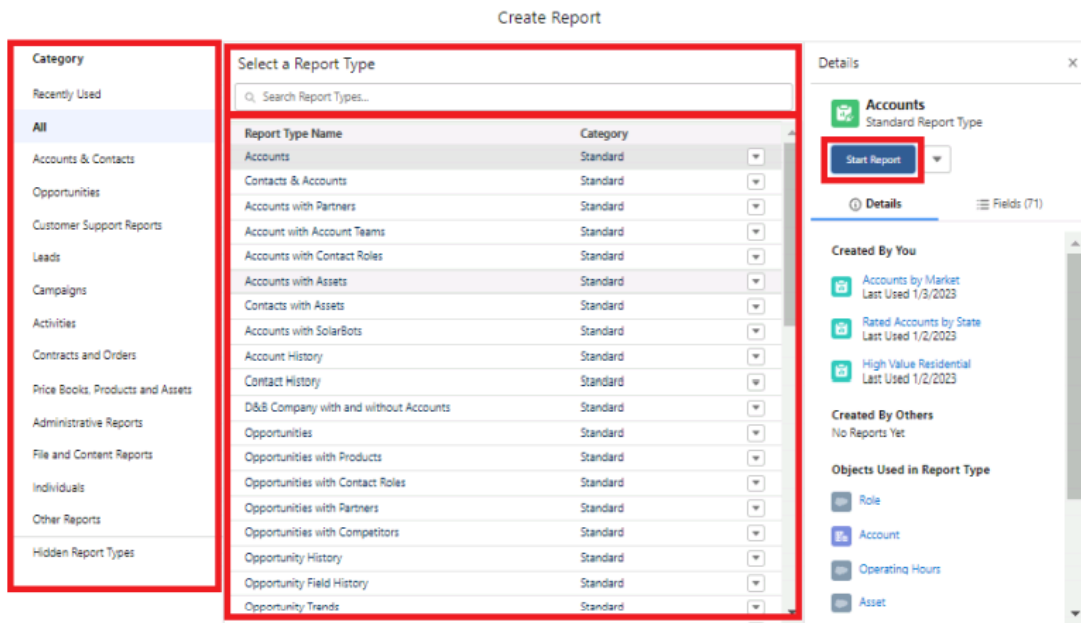
Creation of report

Note- While creation of report ensure that update preview automatically is selected which is available at the right side of the report page.

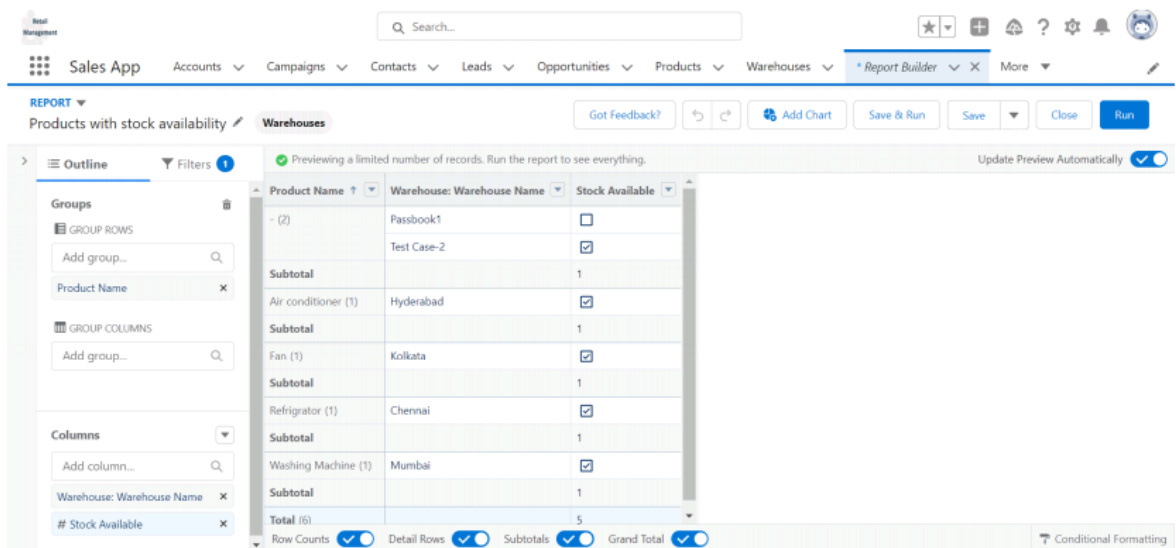
- 1) Click on the app launcher and search for reports.
- 2) And select a new report, for the record type category select other reports.



- 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.
- 9) And in the warehouse created date select all time.

The screenshot shows the Salesforce Report Builder interface. The report is titled "Products with stock availability" and is filtered by "Warehouses". The report table displays the following data:

Product Name	Warehouse: Warehouse Name	Stock Available
(2)	Passbook1	<input type="checkbox"/>
	Test Case-2	<input checked="" type="checkbox"/>
Subtotal		1
Air conditioner (1)	Hyderabad	<input checked="" type="checkbox"/>
Subtotal		1
Fan (1)	Kolkata	<input checked="" type="checkbox"/>
Subtotal		1
Refrigerator (1)	Chennai	<input checked="" type="checkbox"/>
Subtotal		1
Washing Machine (1)	Mumbai	<input checked="" type="checkbox"/>
Subtotal		1
Total (6)		5

At the bottom of the report, there are checkboxes for "Row Counts", "Detail Rows", "Subtotals", and "Grand Total", all of which are currently checked. There is also a "Conditional Formatting" button on the right.

10) And give the label name products with stock availability.

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

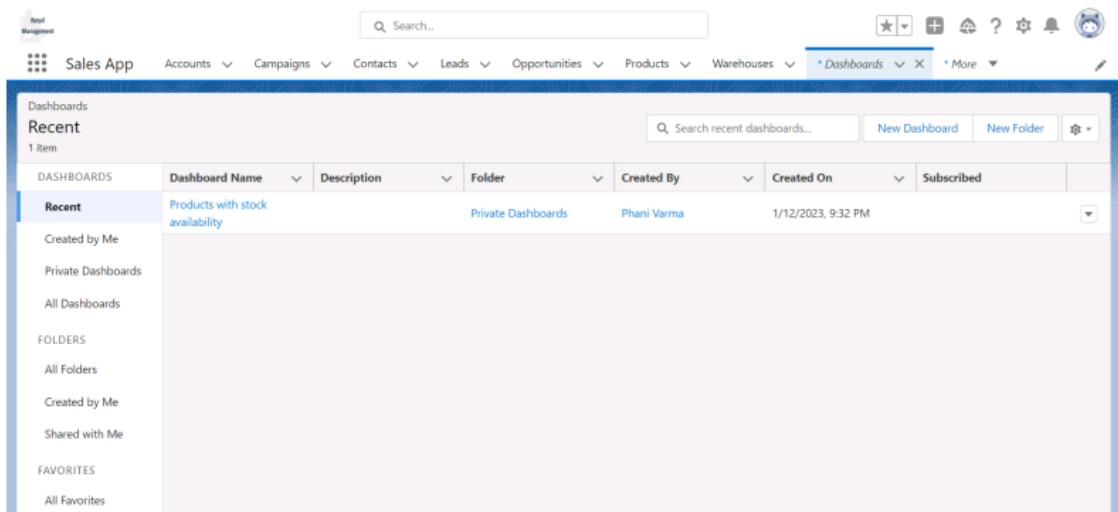
Milestone-8 Dashboards:

Dashboards in Salesforce are a graphical representation of Reports. It shows data from source reports as visual components.

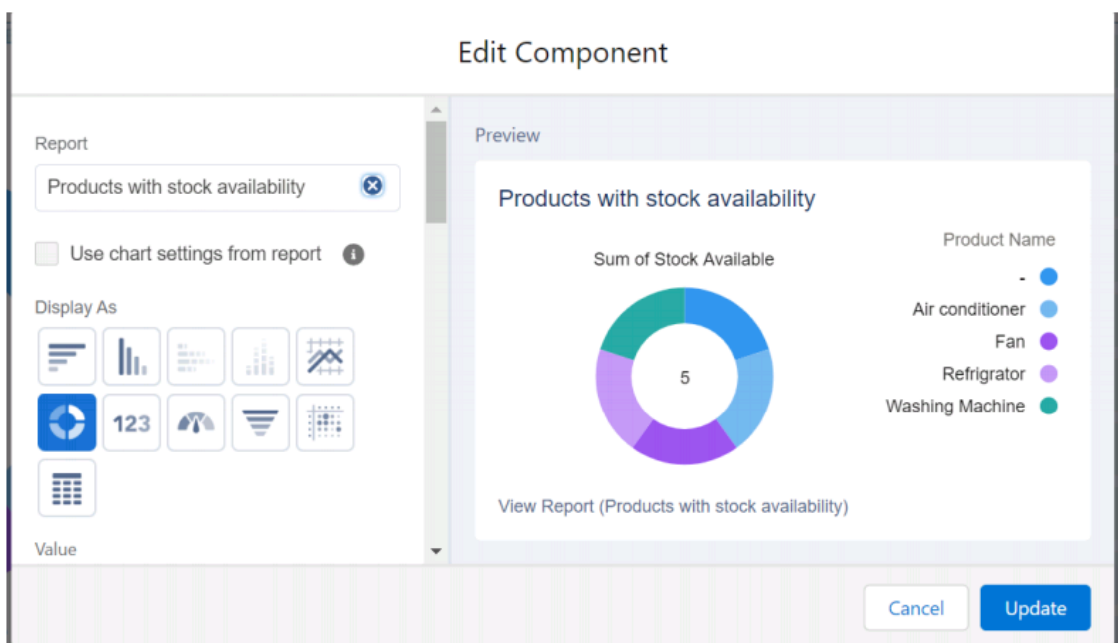
Activity

Creation of Dashboard

- 1) Click on the app launcher and search for dashboards.
- 2) Select the new dashboard option.



- 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.



Edit Component

Value

Sliced By

Display Units

☐ Show Values
☐ Show Percentages
☒ Combine Small Groups into "Others"
☒ Show Total

Preview

Products with stock availability

Sum of Stock Available

View Report (Products with stock availability)

Product Name

-
- Air conditioner
- Fan
- Refrigrator
- Washing Machine

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

Edit Component

Max Values Displayed

Title

Subtitle

Footer

Legend Position

Preview

Products with stock availability

Sum of Stock Available

View Report (Products with stock availability)

Product Name

-
- Air conditioner
- Fan
- Refrigrator
- Washing Machine

- 8) Leave the default values.
 9) Click on add.
 10) And save the dashboard.