

PROJECT REPORT ON
RETAIL MANAGEMENT APPLICATION USING
SALESFORCE (DEVELOPER) - (LONG-TERM)

Introduction:

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 customer.

Milestone-01 : Introduction & Creation Salesforce Org

➔ Creating a developer org in salesforce

- Go to developers.salesforce.com/Signup
- Click on sign up.
- On the sign up form, enter the following details :
- First name & Last name : T & Sreeja
- Email : gopiy910@gmail.com
- Role : Developer
- Company : Gayatri degree college
- County : India
- Postal Code : 517501
- Username : sreeja@gdcproject.com
- Click on sign up after filling this

The screenshot shows the Salesforce Developer Edition signup page. On the left, a blue banner features a monitor displaying a Salesforce interface and the text: "Build enterprise-quality apps fast to bring your ideas to life". Below this, a list of features is provided: "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". On the right, the Salesforce logo is at the top, followed by the heading "Sign up for your Salesforce Developer Edition" and the subtext "A full-featured copy of the Platform, for free". A grey box contains the instruction: "Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial." The form fields are: "First Name*" (filled with 'T'), "Last Name*" (filled with 'Sreeja'), "Email*" (filled with 'goply910@gmail.com'), "Role*" (a dropdown menu with 'Administrator' selected), and "Company*" (filled with 'Gayatri Degree College'). A "Verify Account" button is located at the bottom right of the form. A Windows watermark is visible in the bottom right corner.

developer.salesforce.com/signup

salesforce

Sign up for your Salesforce Developer Edition

A full-featured copy of the Platform, for free

Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.

First Name*
T

Last Name*
Sreeja

Email*
goply910@gmail.com

Role*
Administrator

Company*
Gayatri Degree College

Activate Windows
Go to Settings to activate Windows.

➤ Account Activation

The screenshot shows a Gmail inbox. The left sidebar displays the standard Gmail navigation menu: "Compose", "Inbox" (13), "Starred", "Snoozed", "Sent", "Drafts" (10), and "More". Below these are "Labels" and "[imap]/Sent". The main content area shows an email from Salesforce. The email header includes the subject "Click below to verify your account." and a "Verify Account" button. The body of the email contains the text: "To easily log in later, save this URL: https://gayatridegreecollege106-dev-ed.develop.my.salesforce.com", "Username: sreeja@gdcproject.com", and "Again, welcome to Salesforce!". A notification bar at the bottom of the email asks to "Enable desktop notifications for Gmail." with "OK", "No, thanks", and "X" options. A Windows watermark is visible in the bottom right corner.

mail.google.com/mail/u/0/#inbox/FMfcgzGxSISxSBMjJbZRTWvSthCwcvCQ

Gmail

Search mail

Compose

Inbox 13

Starred

Snoozed

Sent

Drafts 10

More

Labels

[imap]/Sent

Click below to verify your account.

Verify Account

To easily log in later, save this URL:
<https://gayatridegreecollege106-dev-ed.develop.my.salesforce.com>

Username:
sreeja@gdcproject.com

Again, welcome to Salesforce!

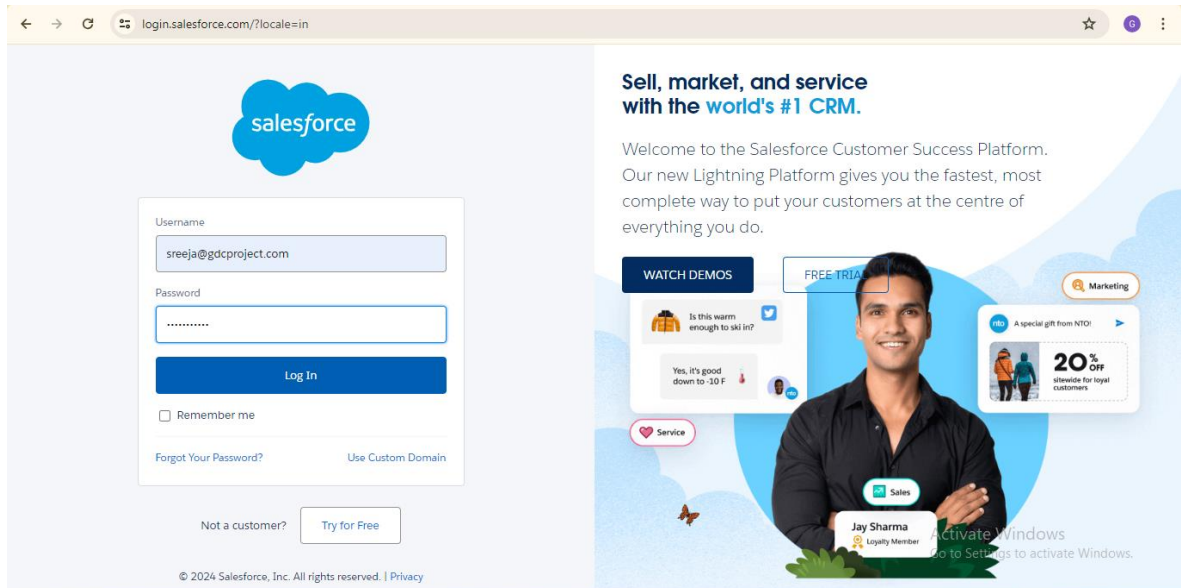
Enable desktop notifications for Gmail. OK No, thanks X

Activate Windows
Go to Settings to activate Windows.

➤ Login to your Salesforce Org

➤ *Salesforce Login:*

<https://login.salesforce.com>



Milestone-02 : Object

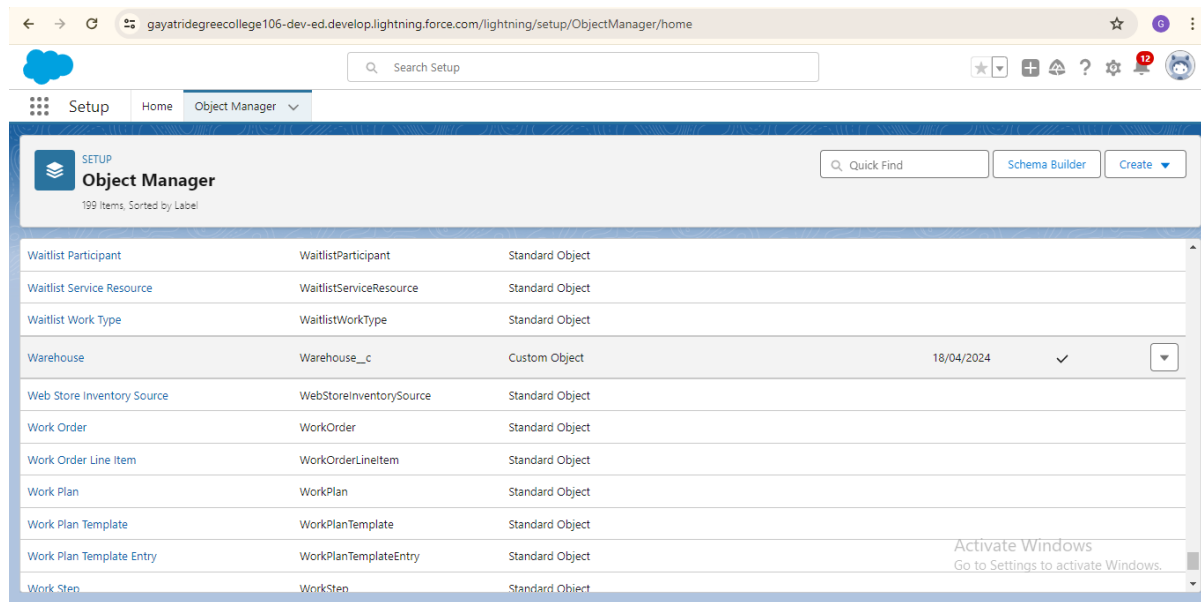
1. Click on the gear icon and then select Setup.
 2. Click on the object manager tab just beside the home tab.
 3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
 4. On the Custom Object Definition page, create the object as follows:
 5. Label: Warehouse
 6. Plural Label: Warehouses
 7. Record Name: Warehouse Name
 8. Check the Allow Reports checkbox
 9. Check the Allow Search checkbox
 10. Click Save
- In the same way create **2** more objects as Sales order, Dispatch/Tracking.
- **Creation of object : Sales order**
1. Click on the gear icon and then select Setup.

2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
4. On the Custom Object Definition page, create the object as follows:
5. Label: Sales order
6. Plural Label: Sales orders
7. Record Name: Sales order Number
8. Check the Allow Reports checkbox
9. Check the Allow Search checkbox
10. Click Save

➤ **Creation of Object : Dispatch/Tracking**

1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
4. On the Custom Object Definition page, create the object as follows:
5. Label: Warehouse
6. Plural Label: Dispatch/Trackings
7. Record Name: Tracking Name
8. Check the Allow Reports checkbox
9. Check the Allow Search checkbox
10. Click Save.

OBJECTS CREATED:



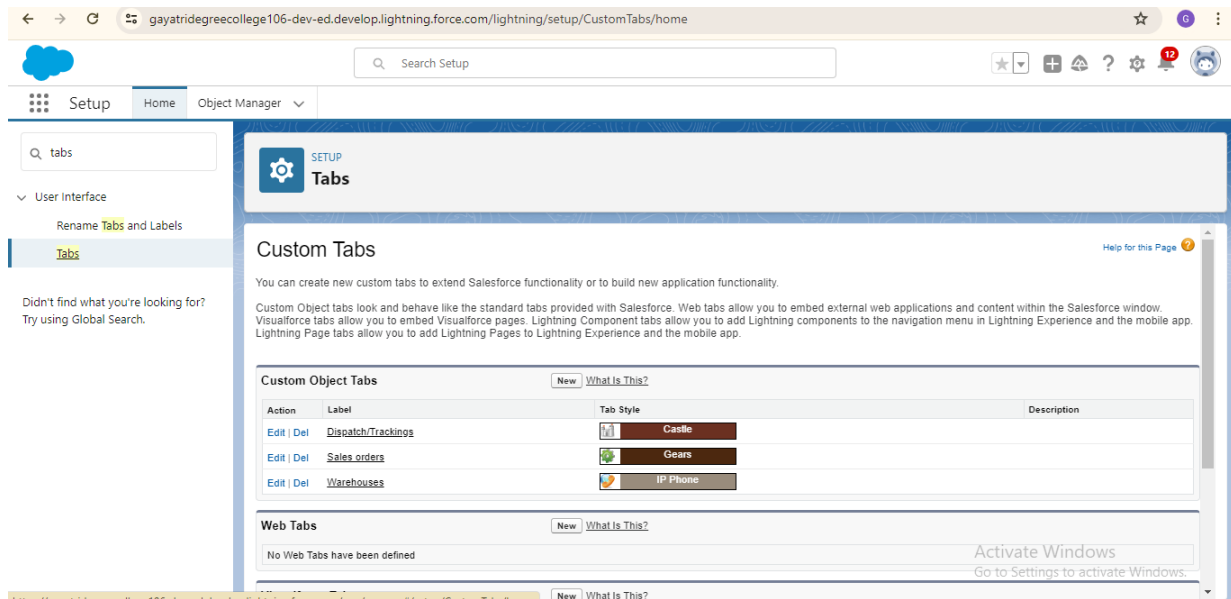
Milestone-03 : What Is A Tab?

Tabs in Salesforce help users view the information at a glance. It displays the data of objects and other web content in the application.

Create A Tab For Warehouse Object

1. 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

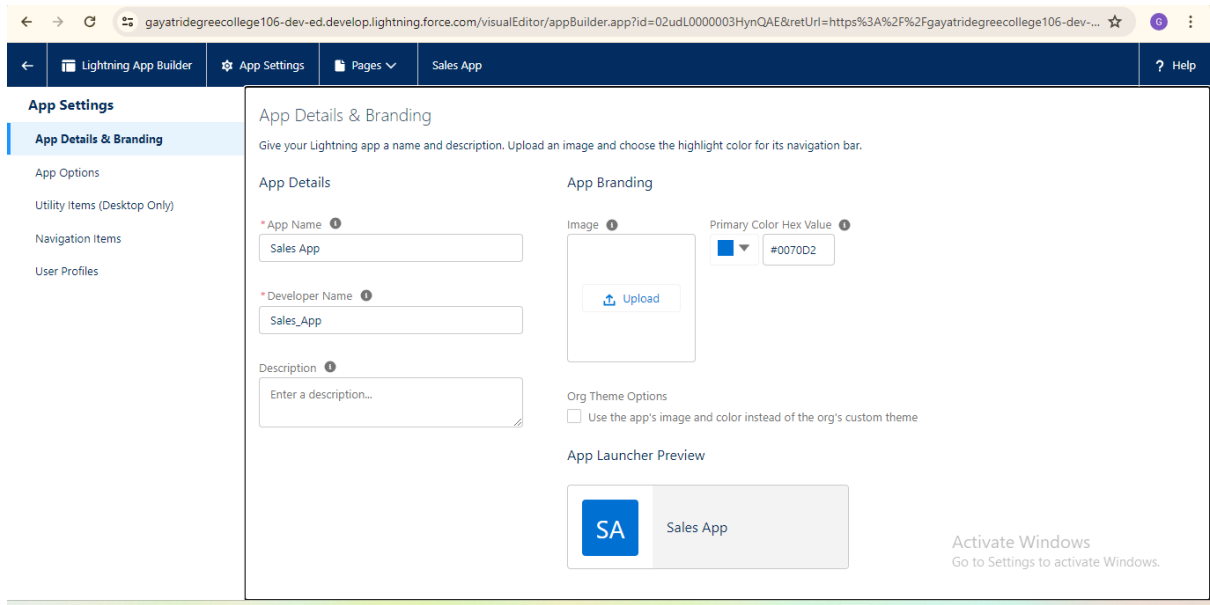
A Tab For Sales order Object,Dispatch/Tracking,Warehouse



Milestone-04 : What Is An App

❖ Create The Sales App

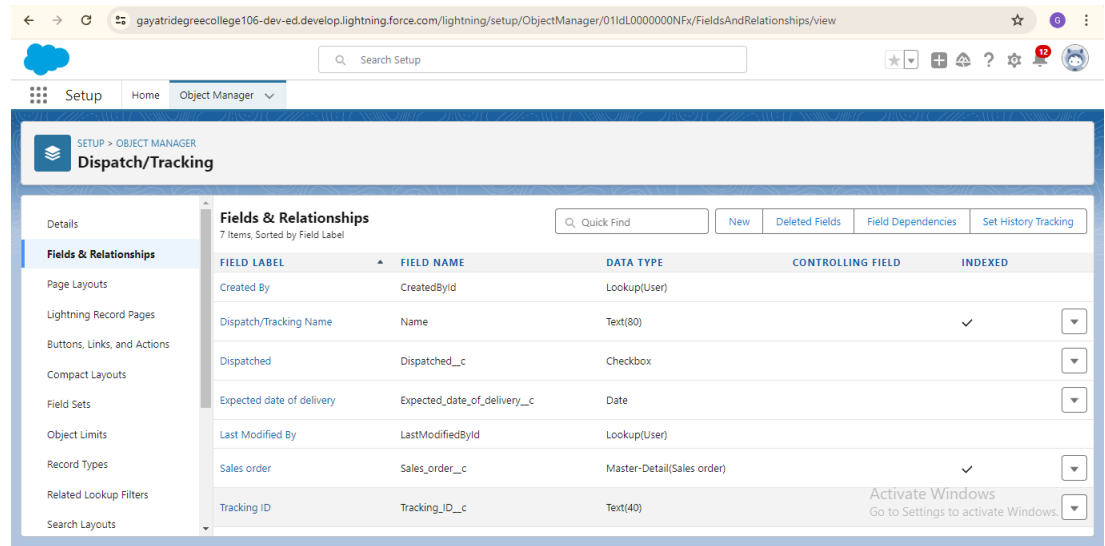
1. From Setup, enter App Manager in the Quick Find and select App Manager.
2. Click New Lightning App.
3. Enter Sales App as the App Name, then click Next
4. Under App Options, leave the default selections and click Next.
5. Under Utility Items, leave as is and click Next.
6. From Available Items, select Campaign, Leads, Accounts, Contacts, Opportunities, Products, Warehouse, Sales order, Dispatch/Tracking, Reports, and Dashboards and move them to Selected Items. Click Next.
7. From Available Profiles, select System Administrator and move it to Selected Profiles. Click Save & Finish.



Milestone- 05 : Fields And Relationship

❖ Creation Of Fields For The Dispatch/Tracking Object

1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Dispatch/Tracking
4. Select Fields & Relationships from the left navigation
5. Click New
6. Select the Text as the Data Type, click Next.
7. For Field Label, enter Tracking ID & length = 40.
8. Click Next, Next, then Save & New.



❖ Create A Master-Detail Relationship On Dispatch/Delivery Object

1. Select Master-Detail Relationship as the Data Type and click Next.
2. For Related to, enter Sales order.
3. Click Next.
4. For Field Label, enter Sales order.
5. Click Next, Next, Next and Save.

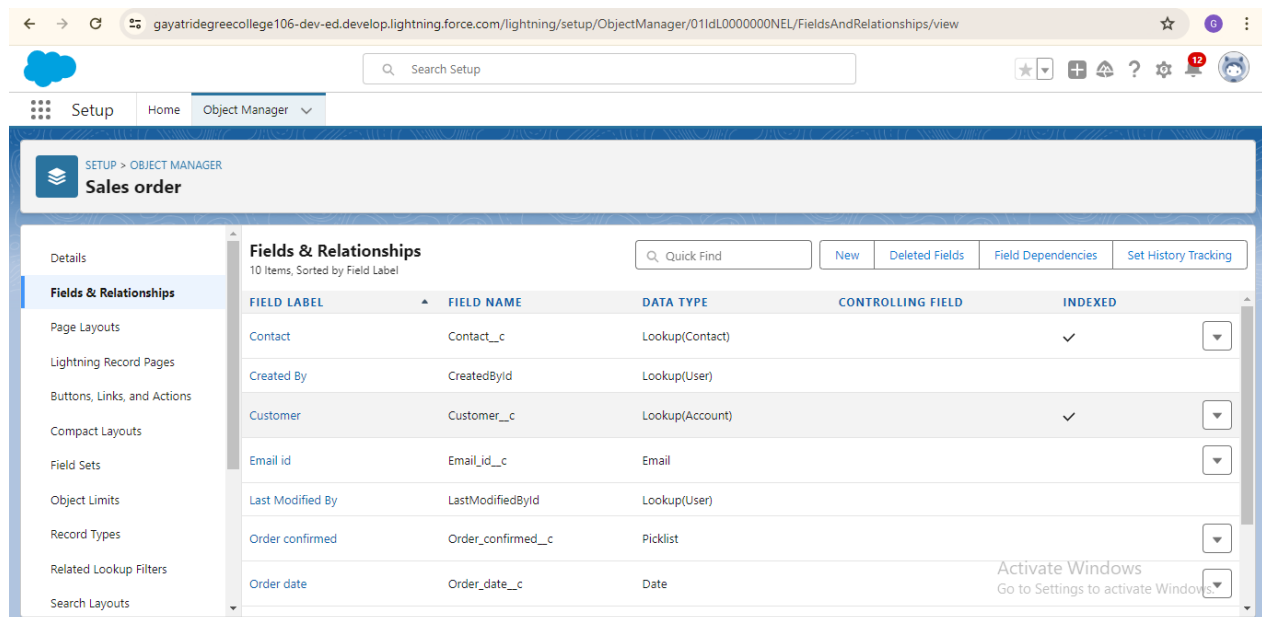
❖ Create A Pick-List Field On Sales Order

1. From Setup, click Object Manager and select Sales order.
2. Click Fields & Relationships, then New.
3. Select Picklist as the Data Type and click Next.
4. For Field Label enter Status
5. Select Enter values, with each value separated by a new line and enter these values:
 6. Open
 7. Hold
 8. Shipped
 9. Returned

10. Click Next, Next, then Save & New.

❖ Create A Lookup Relationship On Sales Order Object With Account Object

1. Follow steps 1 to 5 of field creation then follow below steps.
2. Select look up Relationship as the Data Type and click Next.
3. For Related to, enter Account.
4. Click Next.
5. For Field Label, enter Customer.
6. Click Next, Next, Next and Save.



❖ Create A Lookup Relationship On Sales Order Object With Contact Object

With Use Of Lookup Filter.

1. Select look up Relationship as the Data Type and click Next.
2. For Related to, enter Contact.
3. Click Next.
4. For Field Label, enter Contact.
5. Click lookup filter.
6. Provide filter as given below & also refer picture (Screenshot of Step 6)

7. Contact: Account ID equals Sales Order: Customer
8. Click Next, Next, Next and Save.

❖ **Create Order Date Field On Sales Order**

1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Sales Order
4. Select Fields & Relationships from the left navigation
5. Click New
6. Select the Date as the Data Type, click Next.
7. For Field Label, enter Order date.
8. Click Next, Next, then Save & New.

❖ **Cross-Object Formula Field**

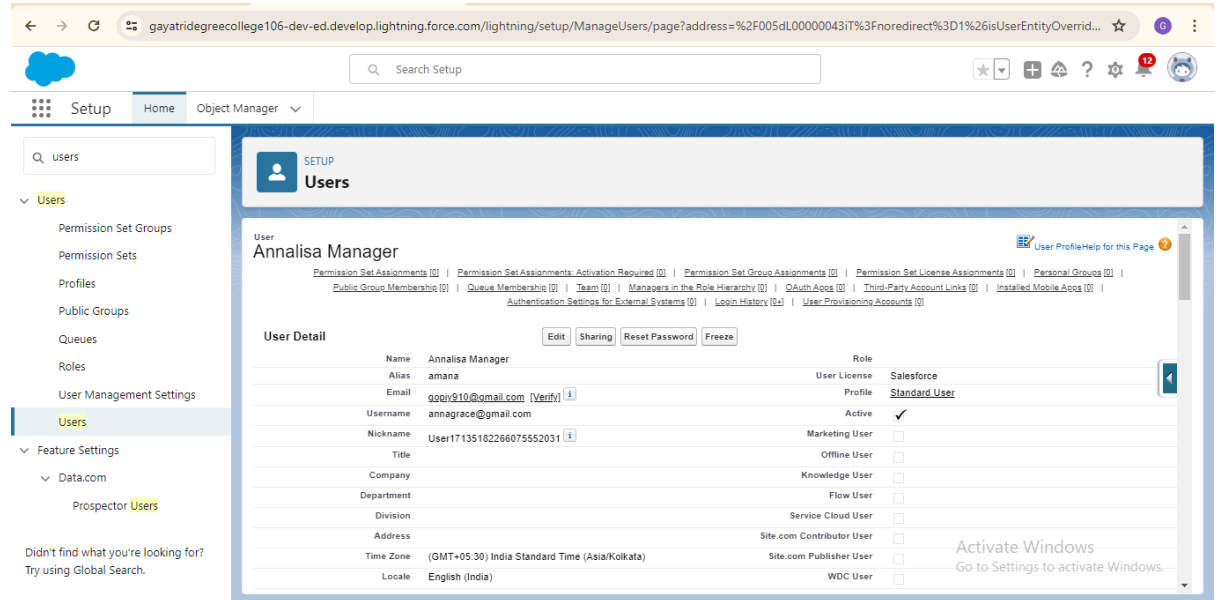
1. Select your object from object selection has Contact.
2. And select the option fields and relationships.
3. At the top right side you can find a new select that option.
4. Now you have to select data type as formula.
5. At the top right side you can find a new select that option.
6. Now you have to select data type as formula.
7. At the top right side you can find a new select that option.
8. Now you have to select data type as formula.

Milestone-06 : User

❖ **Creating A User**

1. From Setup, in the Quick Find box, enter Users.
2. Select Users.
3. Click New User.
4. Enter the First Name and Last Name manager and (Your) email address and a unique username in the form of an email address. By default, the username is the same as the email address.
5. Select a User License as Salesforce

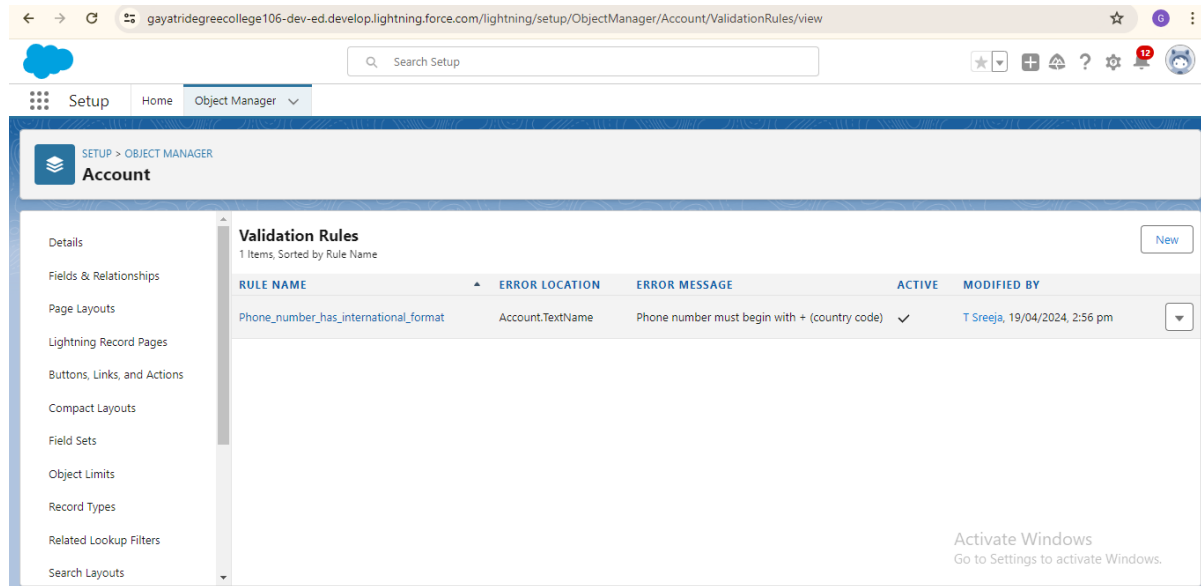
6. Select Standard User profile.
7. Check Generate new password and notify the user immediately to have the user's login name and a temporary password emailed to your email.



Milestone-07 : Validation Rules

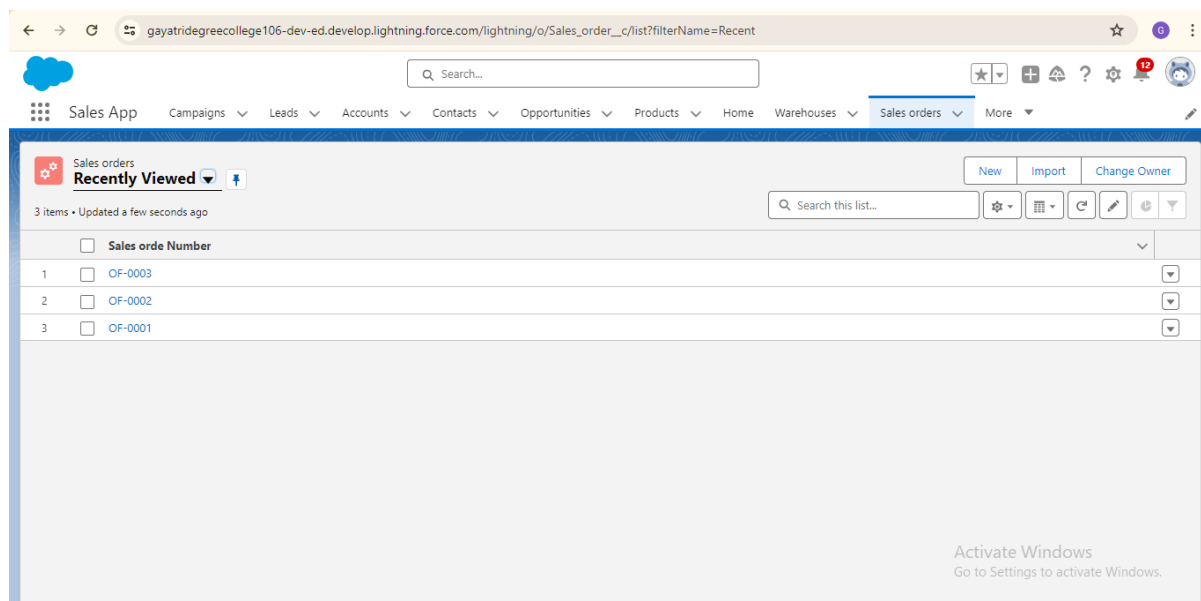
❖ Creation Of Validation Rule

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
 - `LEFT(Phone, 1) <> "+"` .
4. And in error message give the description has Phone number must begin with + (country code).
5. In error location select field.
6. Save



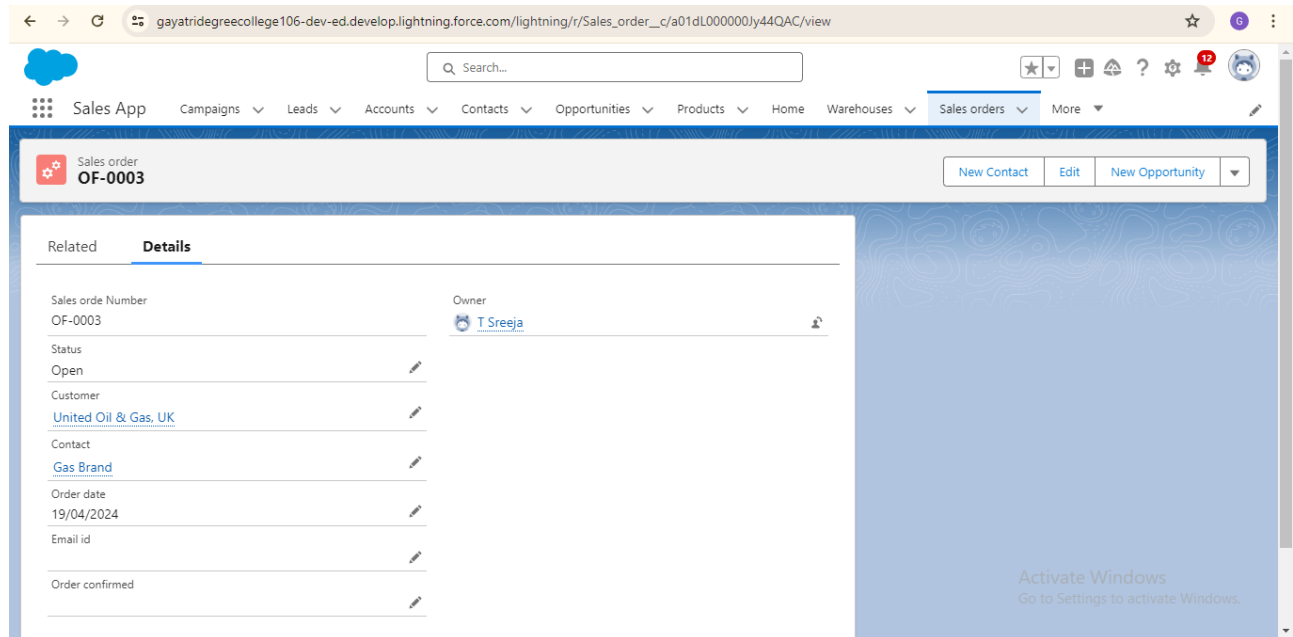
Milestone-08 : User Adoption

- **Create Record (Sales Order)**
 1. Click on App Launcher on left side of screen.
 2. Search Sales App & click on it.
 3. Click on Sales Order tab.
 4. Click new button
 5. Fill all Sales Order record details.
 6. Click on Save Button



- **View Record (Sales Order)**

1. Click on App Launcher on left side of screen.
2. Search Sales App & click on it.
3. Click on Sales Order Tab.
4. Click on any record name. you can see the details of the Sales Order



- **Delete Record (Sales Order)**

1. Click on App Launcher on left side of screen.
2. Search Sales App & click on it.
3. Click on Sales Order Tab.
4. Click on Arrow at right hand side on that Particular record.
5. Click delete and delete again.

Milestone-09 : Reports

- **Create Report**

1. Click App Launcher and
2. Select Sales App
3. Click reports tab
4. Click New Report.
5. Click the report type as Sales order with customer Click Start report.

6. Customize your report, in group rows select - Customer Account Name
7. Click refresh
8. Click save and run
9. Give report name – New Sales orders with Customer Report
10. Click Save

Report: Sales orders with Customer
New Sales orders with Customer Report

Total Records
3

Customer: Account Name	Sales order: Sales order Number
United Oil & Gas, Singapore (1)	OF-0002
Subtotal	
United Oil & Gas, UK (1)	OF-0003
Subtotal	
United Oil & Gas Corp. (1)	OF-0001
Subtotal	
Total (3)	

Activate Windows
Go to Settings to activate Windows.

Row Counts ☒ Detail Rows ☒ Subtotals ☒ Grand Total ☒

• View Report

1. Click on App Launcher on left side of screen.
2. Search “Sales App” & click on it.
3. Click on Reports Tab.
4. Click on New Sales orders with Customer Report and see records.

Milestone-10 : Dashboards

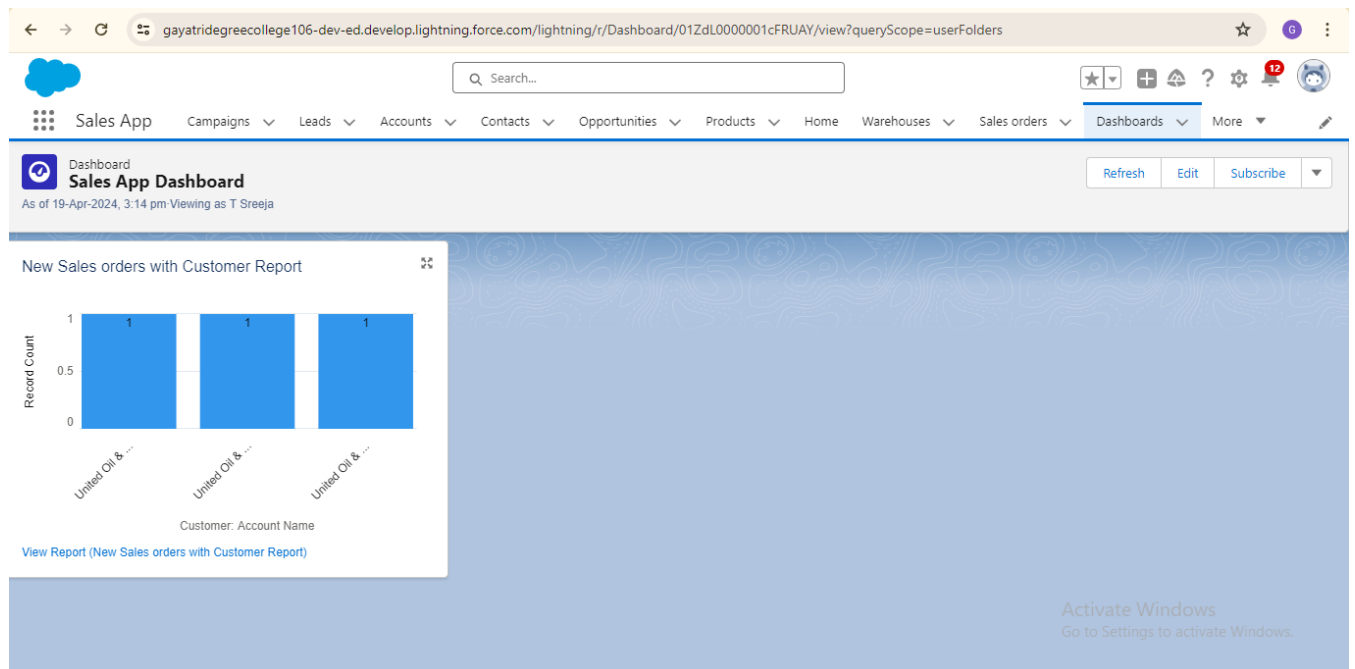
❖ Create Dashboard

1. Click on Dashboards tab from the “Sales App” application,
2. Click on new dashboard
3. Give name- Sales App Dashboard
4. Click create

5. Give your dashboard a name and click on +component.
6. Select the New Sales orders with Customer Report which you created.
7. For the data visualization select any of the chart, table etc as your wish.
8. Click add
9. Click save

❖ View Dashboard

1. Click on App Launcher on left side of screen.
2. Search Sales App & click on it.
3. Click on Dashboard Tab.
4. Click on Sales App Dashboard and see graph view of records



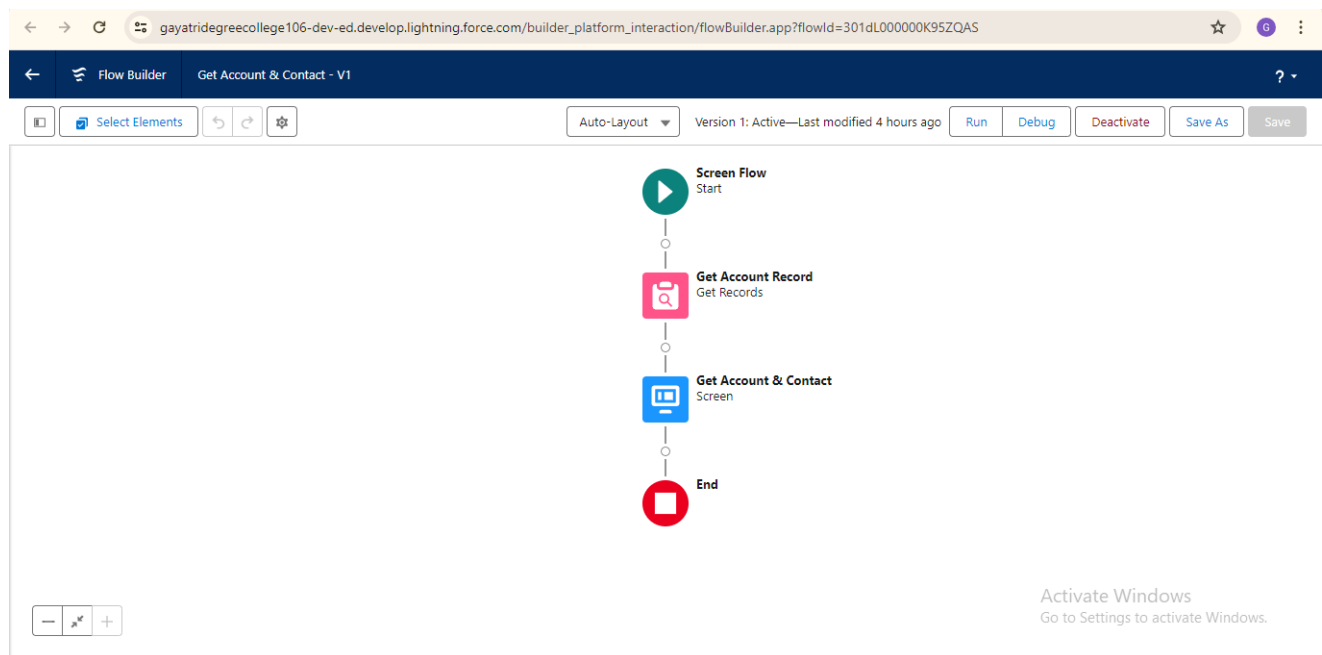
Milestone-11 : Flows

❖ Create Flow

1. Click on setup gear
2. In quick find search for Flows
3. Choose new flow option at right side of the page
4. Now select screen flow as a new flow

5. Left side corner of the page you can find a toggle click on that and select a new resource
6. and select resource type has variable
7. Give api name as Recordid
8. and select data type as Text
9. At bottom for Availability outside the flow check the box as Available for Input
10. Click on done
1. Now below the start button click on add element and choose Get Records
 - a. Now give the label name as Get Account Record
 - b. For Get record of object choose object as - Account
 - c. For Filter account records condition requirements are - All conditions are met
 - d. Field- Account id Operator- equals Value- Recordid (variable which we had created)
 - e. For how many records to share - Only the first record
 - f. How to store record data- Automatically stores all fields.
 - g. Click on done.
 - h. Now again add the element below the Get account record and select Screen as your element
 - i. Give the label name as Get Account & Contacts
 - j. Left side in the component section search for Name and drag it to the screen
 - k. Give the api name as Name
 - l. Now drag Email from component section and move it to the screen
 - m. Give the Api name- Email
 - n. Required - `!$GlobalConstant.True`
 - o. Now drag the Phone from component to screen below the email
 - p. Give the Api name as - Phone
 - q. Required- `!$GlobalConstant.True`

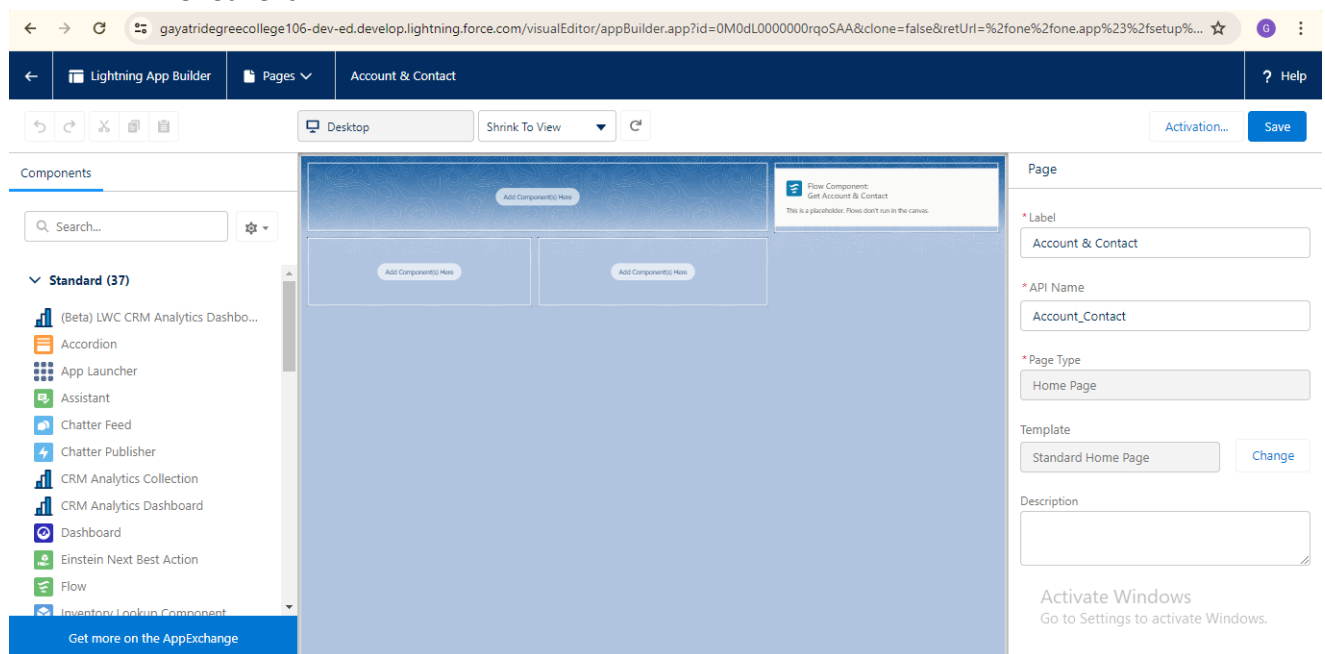
- r. Now Drag Address from component section to screen
- s. Give the Api name as - Address
 - i. City Value- `{!Get_Account_Record.ShippingCity}`
 - ii. Country Value- `{!Get_Account_Record.BillingCountry}`
 - iii. Postal code- `{!Get_Account_Record.ShippingPostalCode}`
 - iv. State/province value- `{!Get_Account_Record.ShippingState}`
 - v. Street Value- `{!Get_Account_Record.ShippingStreet}`
 - vi. Click on done and save it. Give the label name as Get Account & Contact



❖ To Create Lightning Home Page

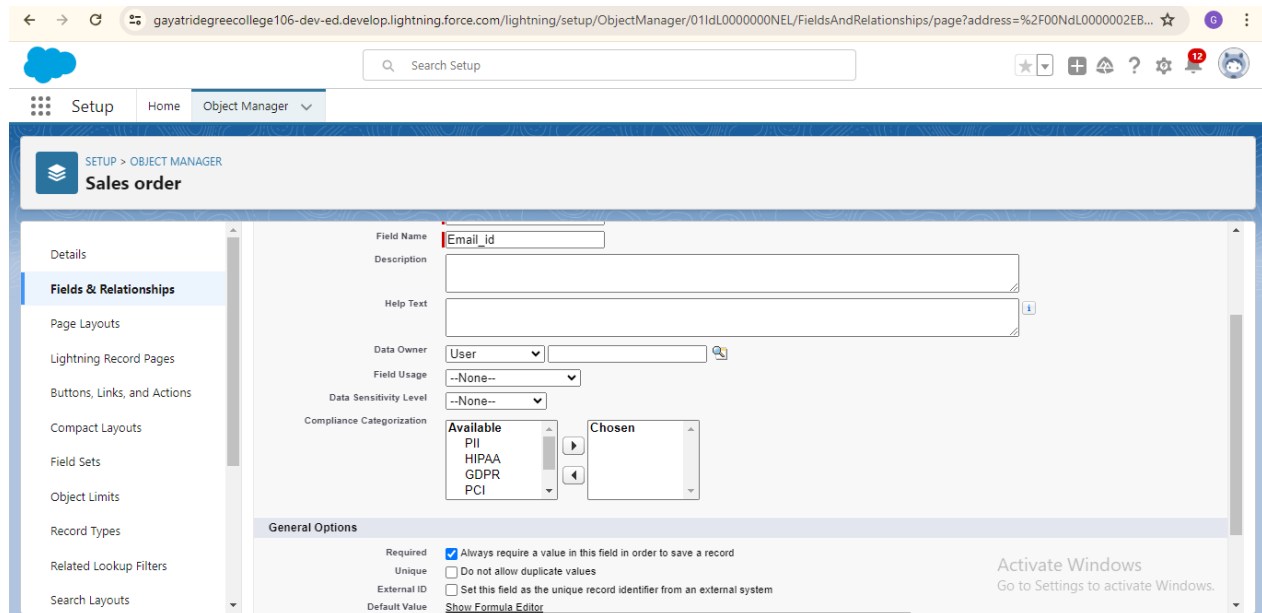
1. Click on setup gear.
2. Now search for lightning App builder.
3. And select New option
4. In create a new lightning page select Home page.
5. Select Next
6. Give the label name - Account & Contact
7. Choose a standard home page.

8. Now in the component section select flow and drag down it to Corner of the page.
9. At the right side select the flow Get Account & Contact
10. at the right side top of the page click on Save.
11. You will get the populate notification and click on activate.
12. you will get an activation pop up select App and profile.
13. Select Sales app in lightning app selection.
14. In profiles select System administrator, Standard user, Standard platform user.
15. Save it.



❖ To Send An Email Alert To The Customer Once Order Is Confirmed

- a. Navigate to setup click on object manager
- b. Select sales order as object
- c. click on fields and relationships
- d. Select Email id field and click on edit
- e. Than in general options select Required Field
- f. Save it.

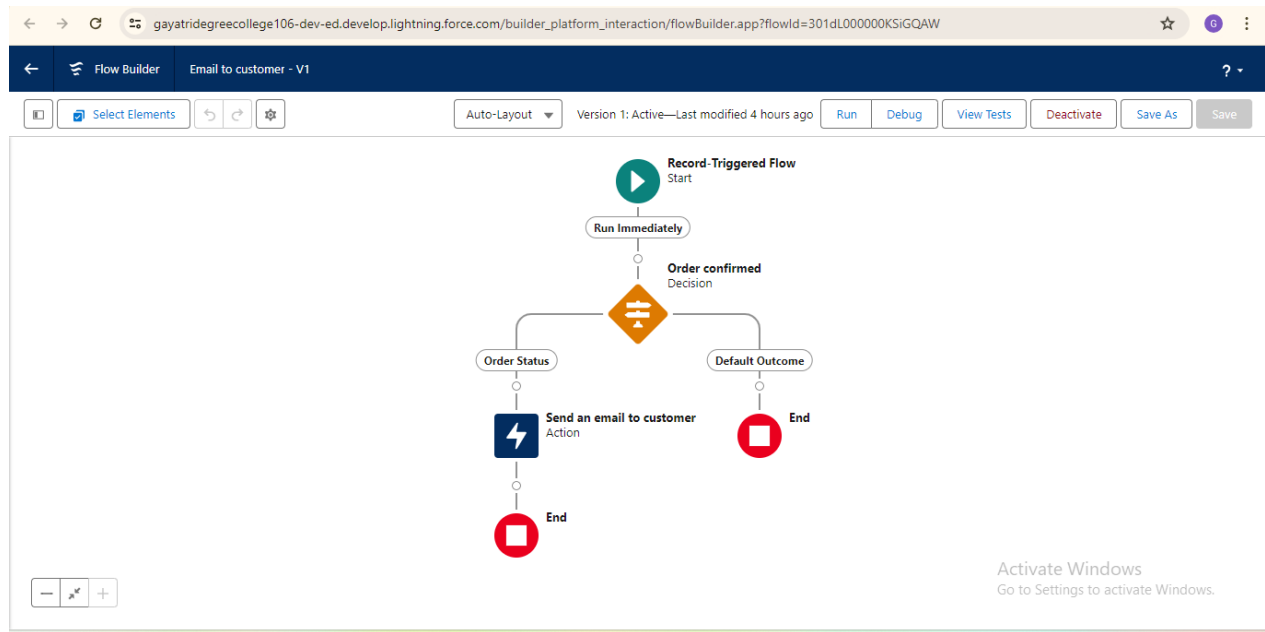


- g. Now Create a new field Order confirmed
- h. On the same object sales order create a Picklist field.
- i. Give the label name as Order confirmed.
- j. And in Values give 1) Yes
2) No
- k. Make it as Required field.

❖ To Create Record Trigger Flow

- i. Click on setup and search for flows.
- ii. Then click on new flow
- iii. Select Record Trigger flow as your flow
- iv. In Object search for Sales order
- v. In Configure Trigger select A record is created
- vi. In set entry conditions All conditions are Met
- vii. In fields search for Order confirmed
- viii. Operator - Equals
- ix. In values select - Yes
- x. In optimize the flow for Select Action and related Records
- xi. Now click on add element and in Logic section select Decision element
- xii. Give the element name as Is Order confirmed

- xiii. In Outcome Details Label as Order Status
- xiv. In condition requirement All Conditions are Met
- xv. In resource select \$Record than field as Order confirmed
- xvi. Operator - Equals
- xvii. Value as Yes
- xviii. Click on done
 - xix. Now Below the Order status Click on add element and select Action as your element.
 - xx. Now in action select Send email
 - xxi. Give the label as Send an email to customer
 - xxii. Now in body select \$Record and then select Id
 - xxiii. Now in body select \$Record and then select Id
 - xxiv. Move your cursor to front before \$record and give the text as Hi Your order with than comes \$record is confirmed
 - xxv. In recipients email address list - select Record and then Email id as your field
 - xxvi. In subject give it as - Order confirmed.
 - xxvii. Click on done.
 - xxviii. Save the flow as Email to customer
 - xxix. And activate the flow.



Milestone-12 : Triggers

❖ Trigger On Account To Prevent Duplicate Name

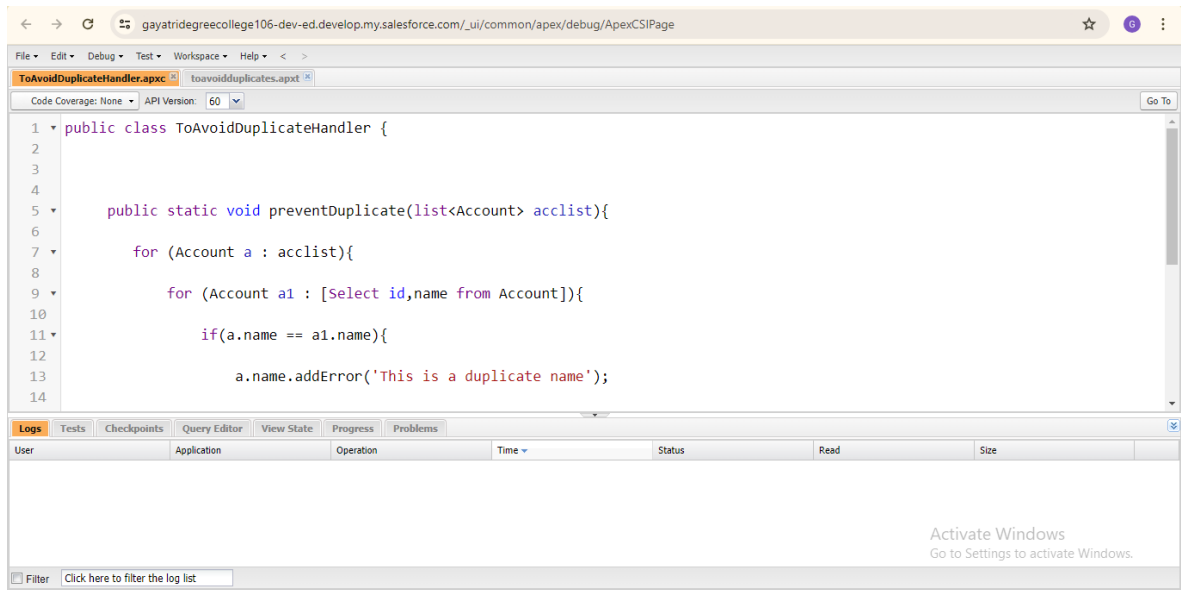
1. Click on Setup and select developer console
2. Click on file and then New
3. Select Apex Class give the name

CODE:

```

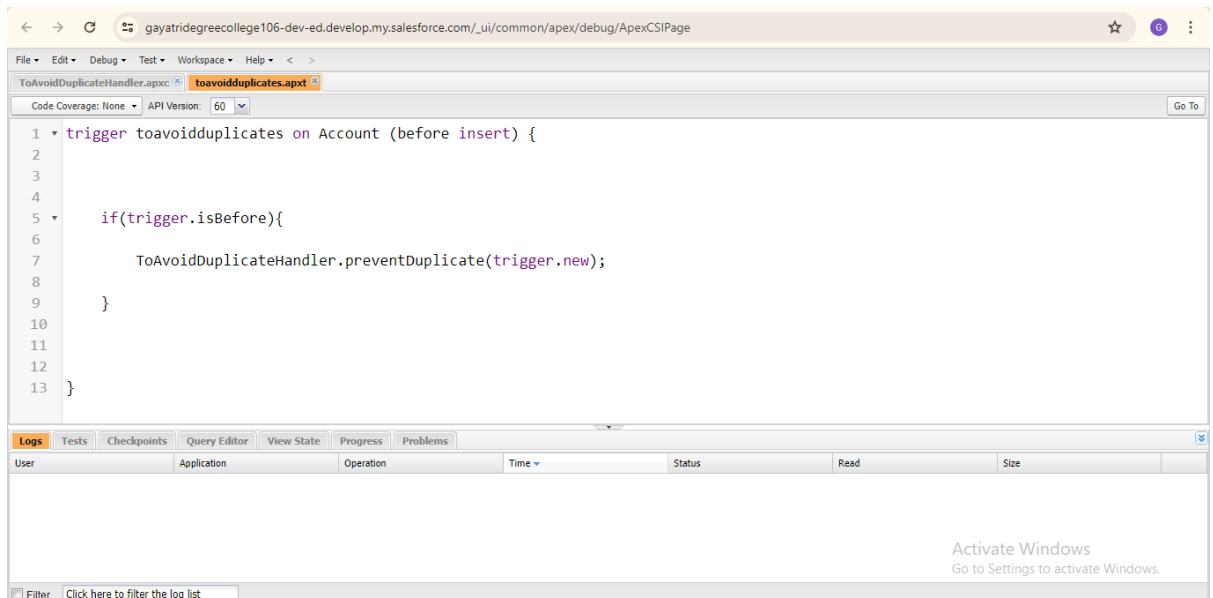
public static void preventDuplicate(list<Account> acclist){
    for (Account a : acclist){
        for (Account a1 : [Select id,name from Account]){
            if(a.name == a1.name){
                a.name.addError('This is a duplicate name');
            }
        }
    }
}

```



❖ Trigger

1. Click on Setup and select developer console
2. Click on file and then New
3. Select Apex trigger give the name as Toavoidduplicates
4. Subject as Account.



CODE:

```

trigger toavoidduplicates on Account (before insert) {
    if(trigger.isBefore){
        ToAvoidDuplicateHandler.preventDuplicate(trigger.new);
    }
}

```

THE END