

# RETAIL MANAGEMENT APPLICATION USING SALESFORCE

## 1.INTRODUCTION

### 1.1 Overview

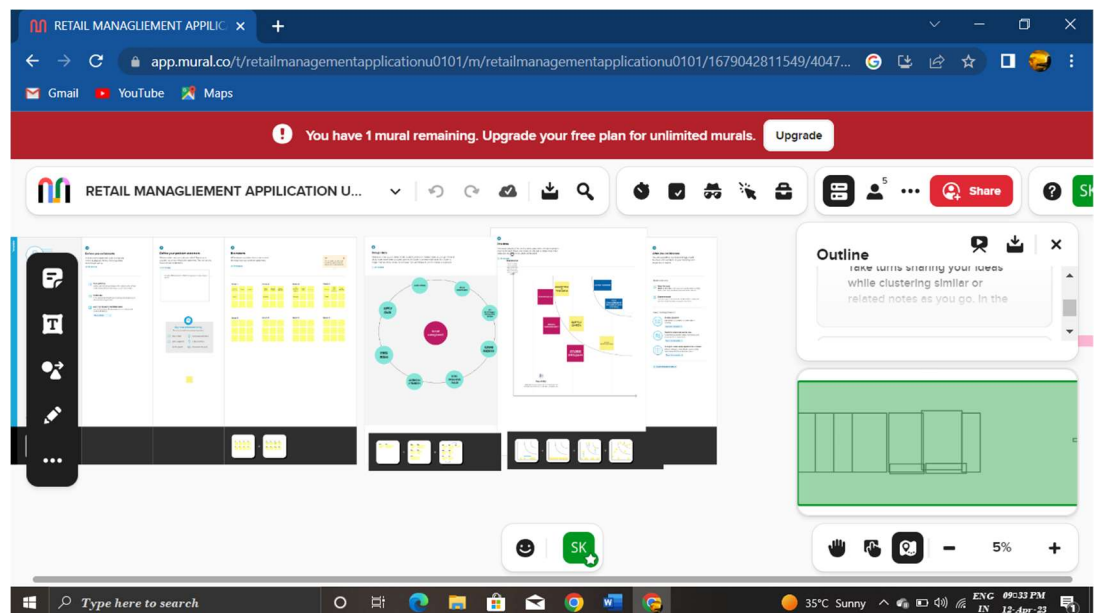
Retailing encompasses the business activities involved in selling goods and services to consumers for their personal, family, or household etc. A CRM product owner has requested to create two applications, one is a sales app for sales reps to use this application and store customers data, and the second 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.

### 1.2 Purpose

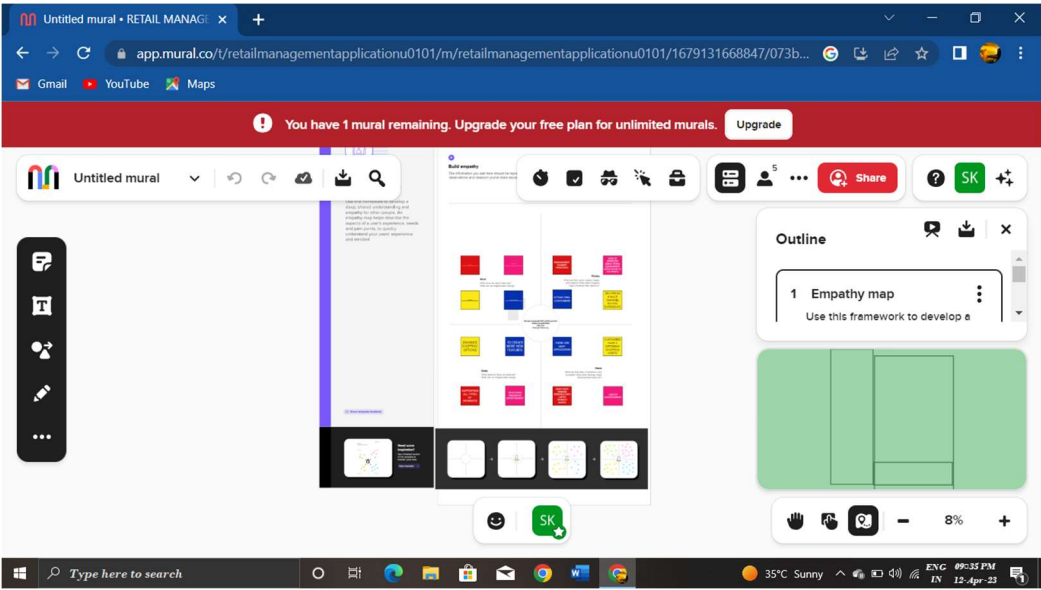
To create CRM application for Retail Management include sales & service.

## 1 Problem Definition & Design Thinking

### 2.1 Empathy Map



2.2 Ideation & Brainstorming Map



3 RESULT

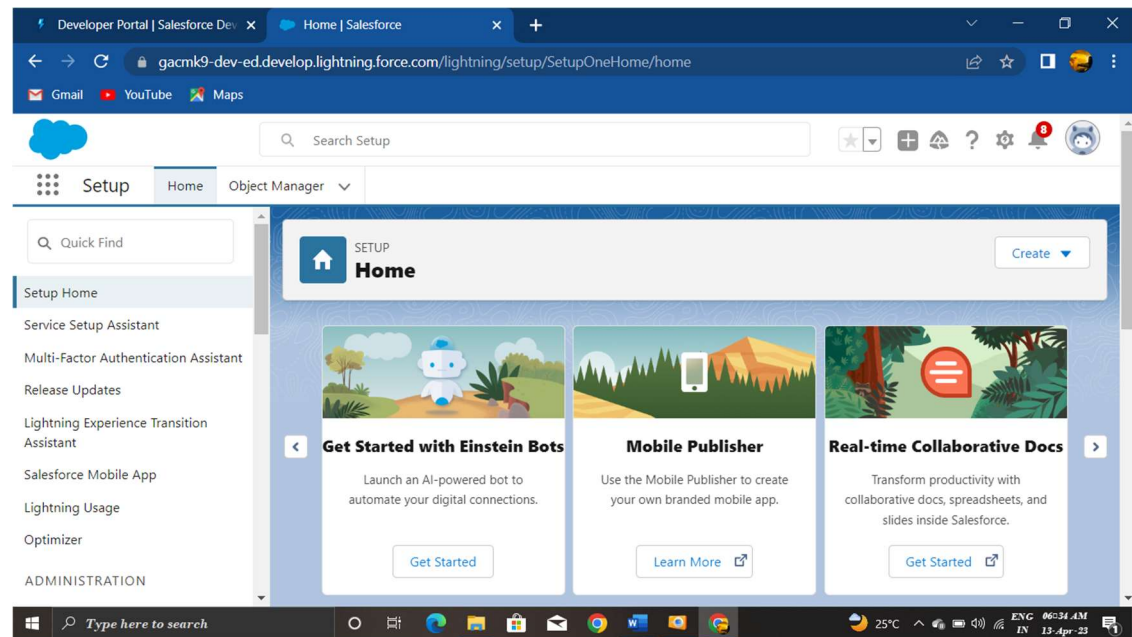
3.1 Data Model:

Object name	Fields in the Object	
obj1 Tracking	Field label	Data type
	Tracking	Checkbox
	Trackings	Checkbox
obj2 Account	Field label	Data type
	Accounts	Formula
	Accounts	Fomula

### 3.2 Activity & Screenshot.

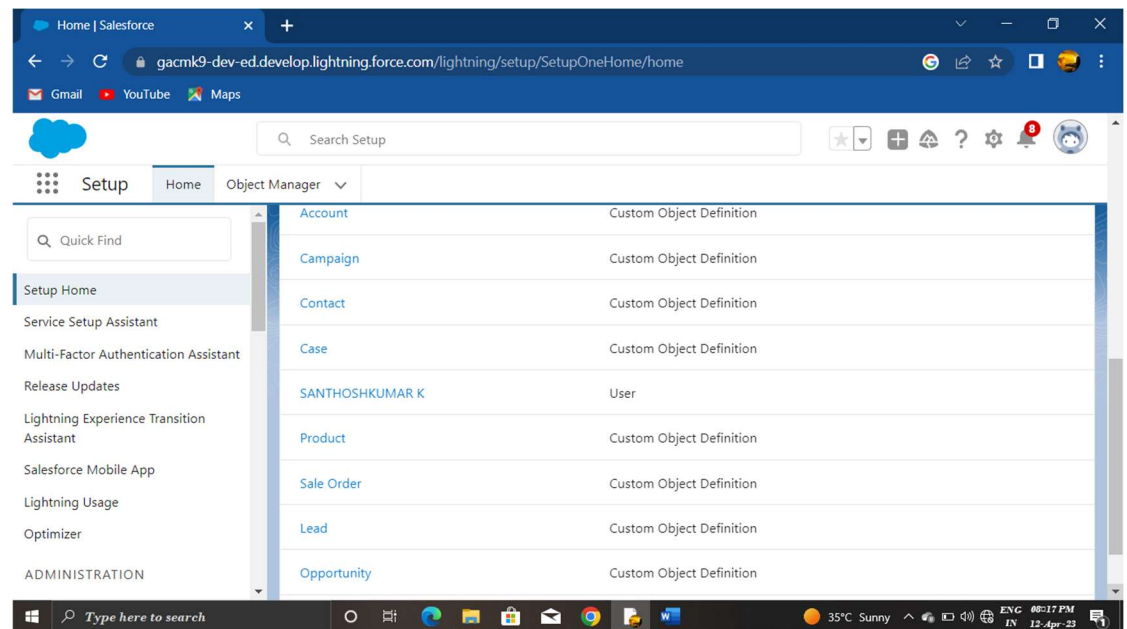
## MILESTONE 1

### ACTIVITY 1 (Creating Developer Account)



## MILESTONE 2 OBJECTS

### ACTIVITY 1



ACTIVITY 2

Tracking | Salesforce

gacmk9-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w0000044HH4/FieldsAndRelationships/...

Search Setup

SetupHomeObject Manager

Tracking

DetailsFields & RelationshipsPage LayoutsLightning Record PagesButtons, Links, and ActionsCompact LayoutsField Sets

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name

Tracking Name

Example: Account Name

Data TypeText

SaveCancel

Recent Accounts

Account Name	City
Acme	New York
Global Media	Toronto
salesforce.com	San Francisco

Type here to search35°C08:28 PM12-Apr-23

MILESTONE 3 Relationship b/w objects  
ACTIVITY 1

Home | SalesforceTracking | Salesforce

gacmk9-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w0000044HH4/FieldsAndRelationships/vi...

Search Setup

SetupHomeObject Manager

Tracking

DetailsFields & RelationshipsPage LayoutsLightning Record PagesButtons, Links, and ActionsCompact LayoutsField Sets

Fields & Relation

5 Items, Sorted by Field Label

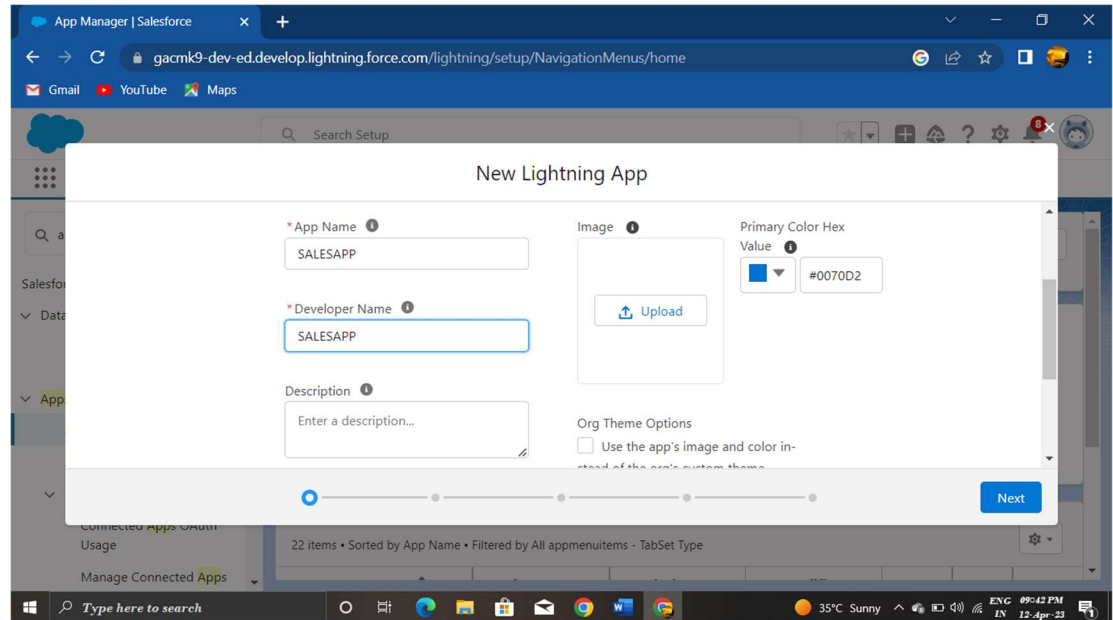
Quick Find

NewDeleted FieldsField DependenciesSet History Tracking

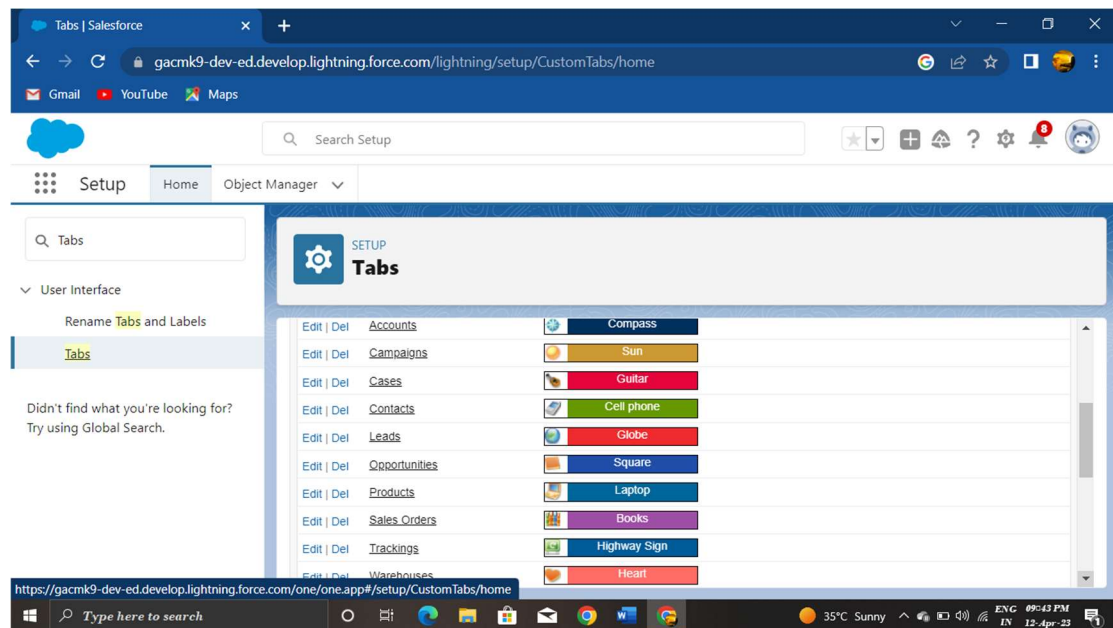
Created by	Createbyuid	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Sale Order	Sale_Order__c	Master-Detail(Sale Order)	✓	
Tracking	Tracking__c	Checkbox		
Tracking Name	Name	Text(80)	✓	

Type here to search35°C Sunny09:06 PM12-Apr-23

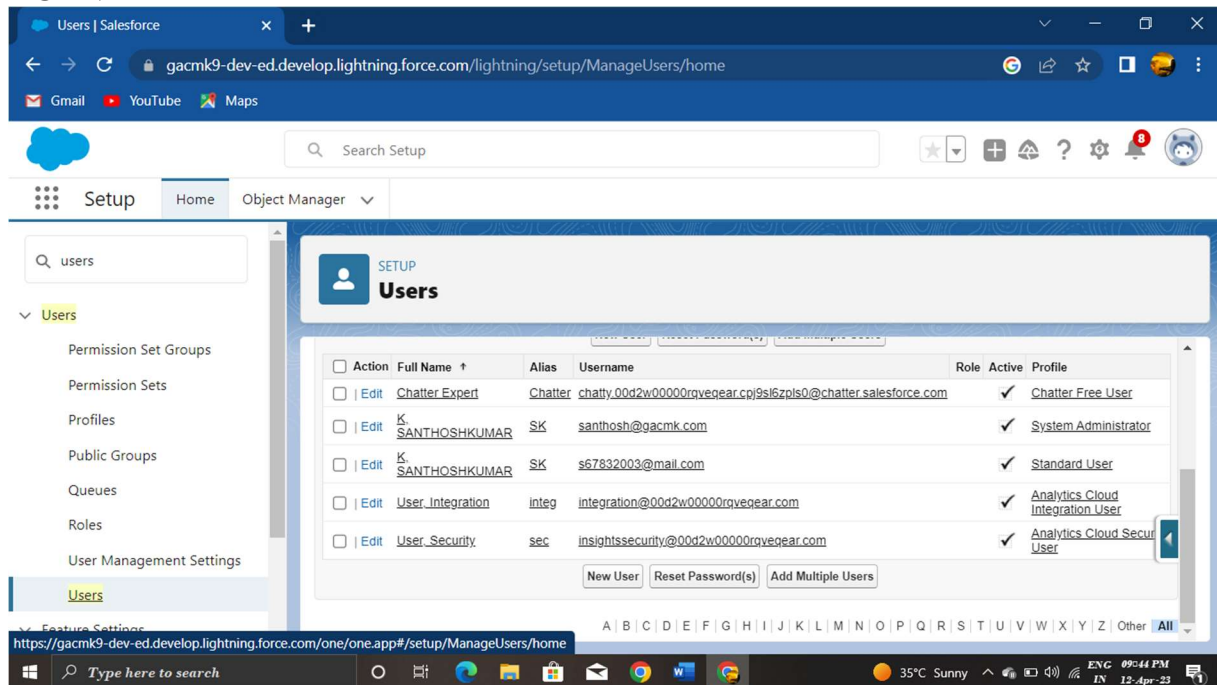
## MILESTONE 4 Application ACTIVITY 1



## MILESTONE 5 LAYOUTS ACTIVITY 1



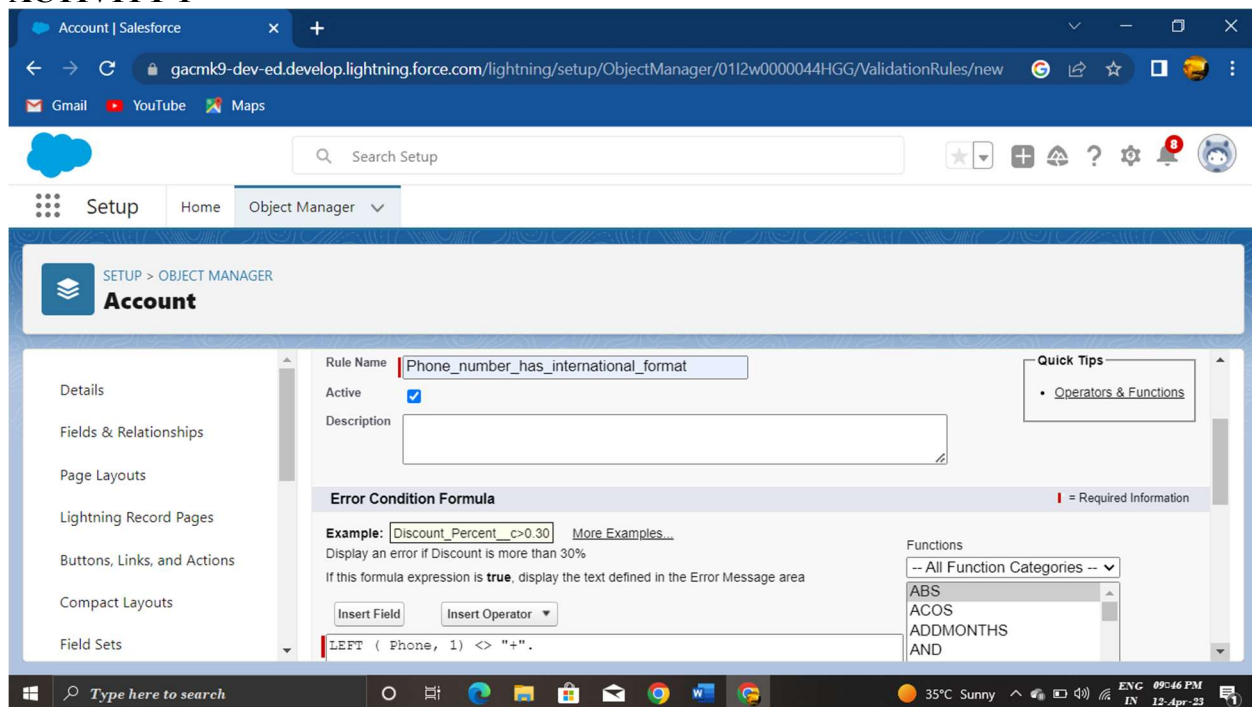
## MILESTONE 6 USERS ACTIVITY 1



The screenshot shows the Salesforce Setup interface for managing users. The left sidebar contains a search bar with 'users' and a list of navigation items: Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, and User Management Settings. The main content area is titled 'SETUP Users' and displays a table of existing users. Below the table are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'. The table lists users with columns for Action, Full Name, Alias, Username, Role, Active status, and Profile.

Action	Full Name	Alias	Username	Role	Active	Profile
<a href="#">Edit</a>	Chatter Expert	Chatter	chatty.00d2w00000rvegear.cpj9s16zpls0@chatter.salesforce.com		✓	Chatter Free User
<a href="#">Edit</a>	K SANTHOSHKUMAR	SK	santhosh@gacmk.com		✓	System Administrator
<a href="#">Edit</a>	K SANTHOSHKUMAR	SK	s67832003@mail.com		✓	Standard User
<a href="#">Edit</a>	User Integration	integ	integration@00d2w00000rvegear.com		✓	Analytics Cloud Integration User
<a href="#">Edit</a>	User Security	sec	insightssecurity@00d2w00000rvegear.com		✓	Analytics Cloud Security User

## MILESTONE 7 VALIDATION RULES ACTIVITY 1



The screenshot shows the Salesforce Setup interface for creating a new validation rule. The left sidebar contains a search bar and navigation items: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, and Field Sets. The main content area is titled 'SETUP > OBJECT MANAGER Account' and displays the 'New Validation Rule' form. The form includes fields for Rule Name, Active status, and Description. Below these is the 'Error Condition Formula' section, which includes an example formula and a list of functions.

Rule Name:

Active: ☒

Description:

Example: `Discount_Percent__c > 0.30`  
Display an error if Discount is more than 30%  
If this formula expression is **true**, display the text defined in the Error Message area

Functions: 

- ABS
- ACOS
- ADDMONTHS
- AND



## ACTIVITY 2

The screenshot shows the Salesforce Object Manager setup for the 'Contact' object. The left sidebar lists navigation options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, and Field Sets. The main content area is titled 'Step 2. Choose output type' and includes a 'Previous' button, a 'Next' button, and a 'Cancel' button. The 'Field Label' is 'Account Website' and the 'Field Name' is 'Account\_Website'. The 'Auto add to custom report type' checkbox is checked, with the text 'Add this field to existing custom report types that contain this entity'. The 'Formula Return Type' section has two options: 'None Selected' (selected) and 'Checkbox' (Calculate a boolean value). The bottom status bar shows the system time as 09:48 PM on 12-Apr-23.

Setup > OBJECT MANAGER  
**Contact**

Details  
**Fields & Relationships**  
Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets

Step 2. Choose output type Step 2 of 5

Field Label: Account Website Field Name: Account\_Website

Auto add to custom report type: ☒ Add this field to existing custom report types that contain this entity

Formula Return Type

☒ None Selected Select one of the data types below.

☐ Checkbox Calculate a boolean value

## MILESTONE 8 REPORTS ACTIVITY

The screenshot shows the Salesforce Reports page. The left sidebar lists navigation options: Reports (selected), Recent (1 item), Created by Me, Private Reports, Public Reports, All Reports, FOLDERS, and All Folders. The main content area shows a table of reports. The table has columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. The table contains one report: 'New Warehouses Report' by 'SANTHOSHKUMAR K' created on '12/4/2023, 11:35 am'. The bottom status bar shows the system time as 09:52 PM on 12-Apr-23.

Reports | Salesforce

Lightning Usage App Lightning Usage Accounts Campaigns Cases Contacts Report Builder

Reports  
Recent  
1 item

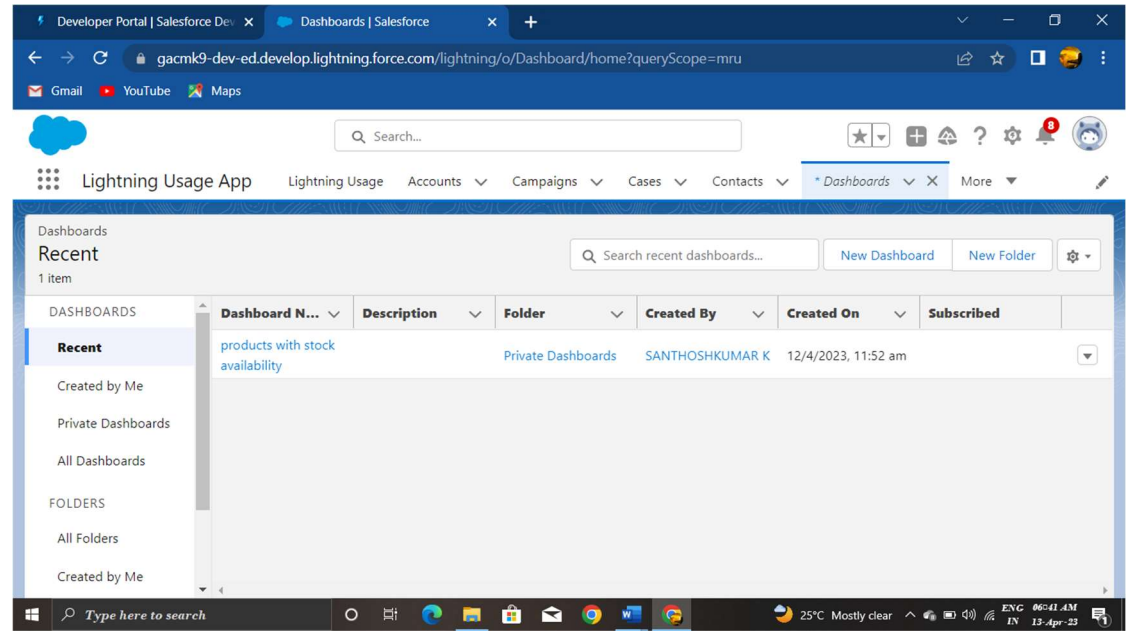
Search recent reports... New Report New Folder

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Warehouses Report		Private Reports	SANTHOSHKUMAR K	12/4/2023, 11:35 am	

Created by Me  
Private Reports  
Public Reports  
All Reports

FOLDERS  
All Folders

## MILESTONE 9 DASHBOARD ACTIVITY



Attach the screenshots of your project activity along with the description.

4

**Trailhead Profile Public URL**

**TEAM LEAD :** <https://trailblazer.me/id/s10053>

**Team Member 1:** <https://trailblazer.me/id/anatm3>

**Team Member 2:**  
<https://trailblazer.me/id/vjagan15>

**TeamMember3:**  
<https://trailblazer.me/id/ggowtham33>



## Project Re

### 5      **ADVANTAGES & DISADVANTAGE**

#### **ADVANTAGE**

1. Less Capital requirement,
2. More Profit Margin,
3. credit Facility,
4. Better Customer Relation,
5. No Liability.

#### **DISADVANTAGE**

1. High Marketing Cost,
2. selling Skill Required,
3. Very High Competition,
4. No economies Of Buying,
5. It Requires proper Location.

### 6      **APPLICATIONS**

- Saves Time And Money
- Easy Generating Reports
- Inventory Management
- Better Customer Relationship.

### 7      **CONCLUSION**

- From this study it is clear that simple approach to successful store location consist the following:
- Know who the specific retail customer is,
- Know where they live and
- Locate in a position to capture their Sales.

## 8 FUTURE SCOPE

- ❖ Supervisory, client communication, merchandise shipment, sales, management and administrative services are all options for candidates with a retail management background.
- ❖ More than **2millions** jobs are available in retail management around the world.