

Build a Retail Management System using Salesforce

INTRODUCTION:

OVERVIEW

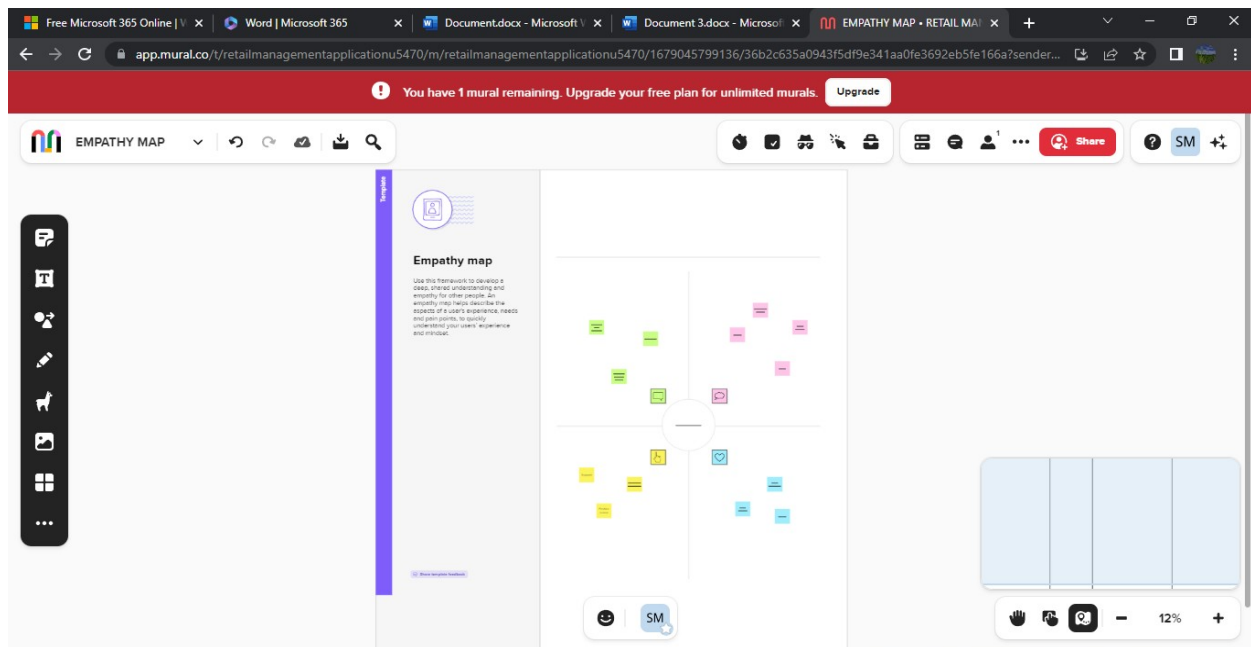
This project helps to develop a retail management system using salesforce. Salesforce is customer relationship management application which is being used in almost all companies to have a friendly relationship with the customer.in our project. We have created a retail management system for the customers.

PURPOSE

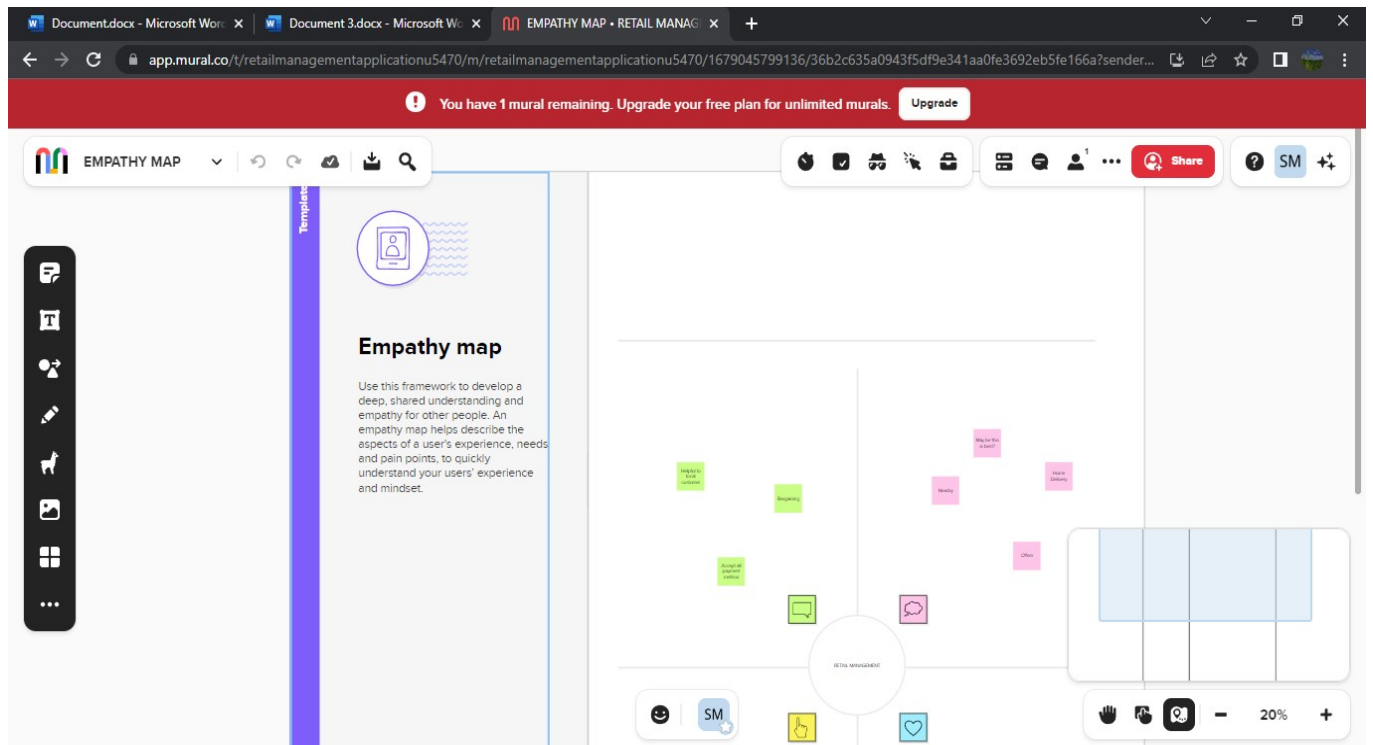
It aims to produce real time knowledge of the salesforce and how we can build an app using salesforce. In this project we do promotions by using object, we capture customers data, we capture leads here, employees data of customer, SMB sales orders data, we store product details, we capture stocks data, this is an actual order which has invoice details, orders , we store product details, we capture stocks data, this is an actual order which has invoice details, orders , we store product details, we capture stocks , we store product details, we capture stocks, order dispatch related info will be stored here, historical problem of customers will be stored here.

DEFINITION AND PROBLEM DESIGN THINKING

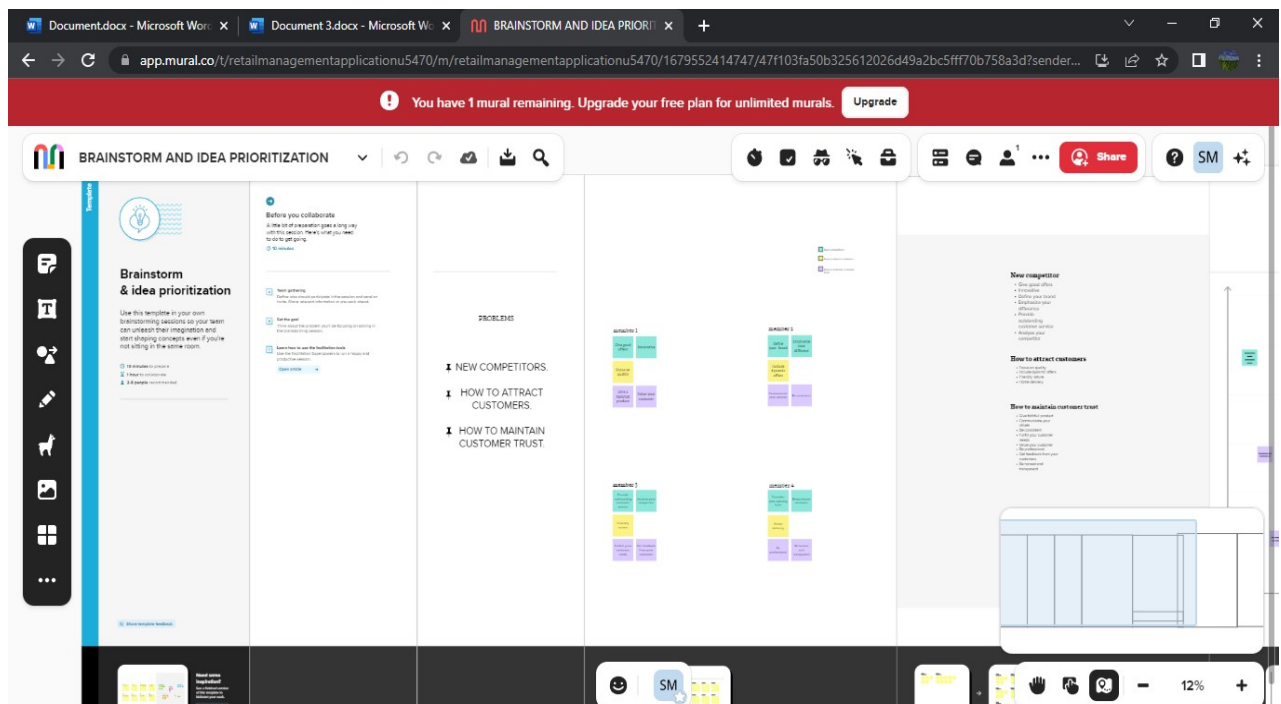
EMPATHY MAP

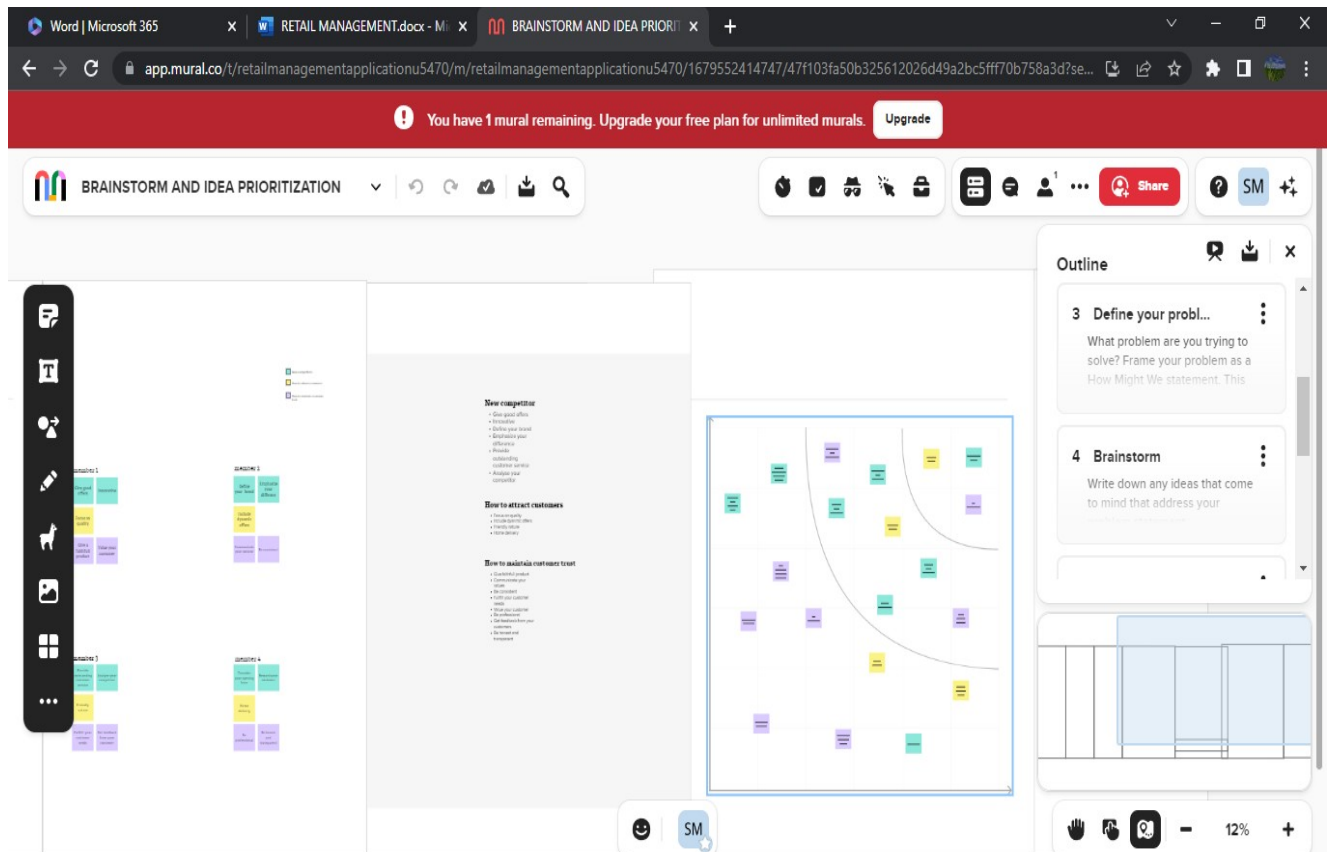


The screenshot displays the Mural workspace interface. At the top, a red banner indicates a free trial status: "You have 1 mural remaining. Upgrade your free plan for unlimited murals." The main workspace area shows a diagram titled "RETAIL MANAGEMENT" with a central circle and several surrounding sticky notes. The sticky notes include: "Create an online presence", "Offer great customer service", "Product quality", "Price your products right", "Stock products properly", "Strong relationships", and "Loyal". The interface also features a sidebar with various icons for collaboration, a top navigation bar with "EMPATHY MAP" and search, and a bottom toolbar with a "Share" button and a "SM" icon.



BRAINSTORMING AND IDEA PRIORITIZATION





RESULT:

DATA MODEL

Object Name	Fields in the Object	
	Field label	Data type
Dispatch/Tracking	Dispatched	Checkbox
	sales order	Master details

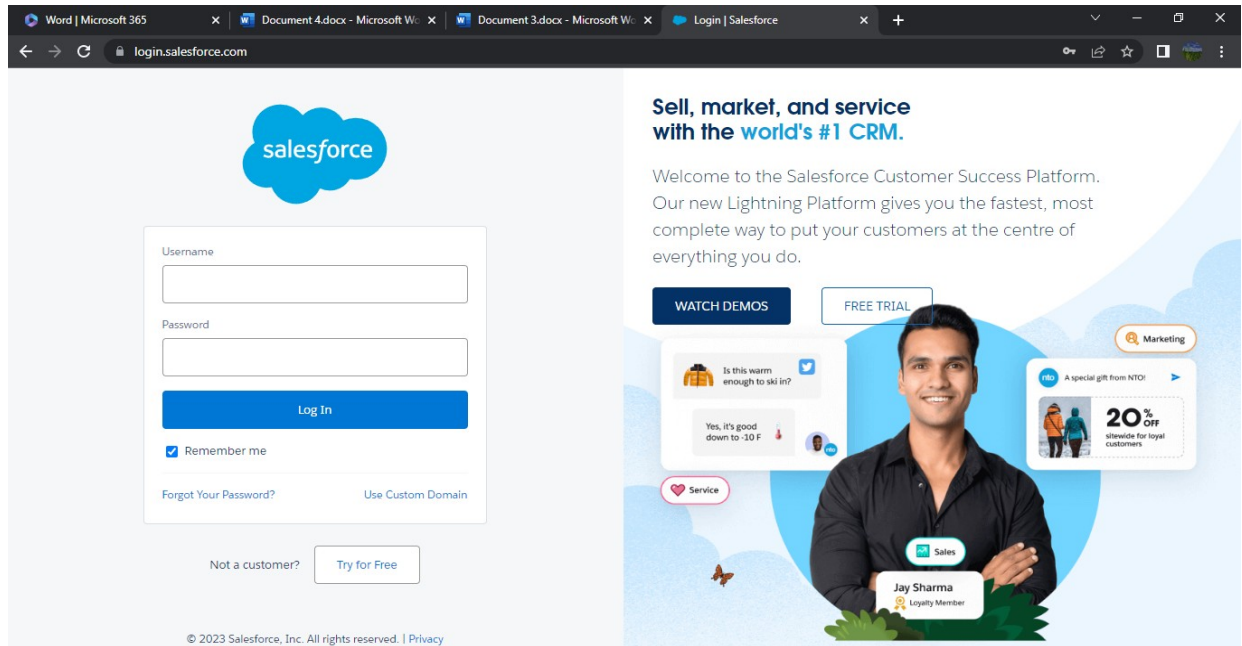
ACTIVITY AND SCREENSHOT

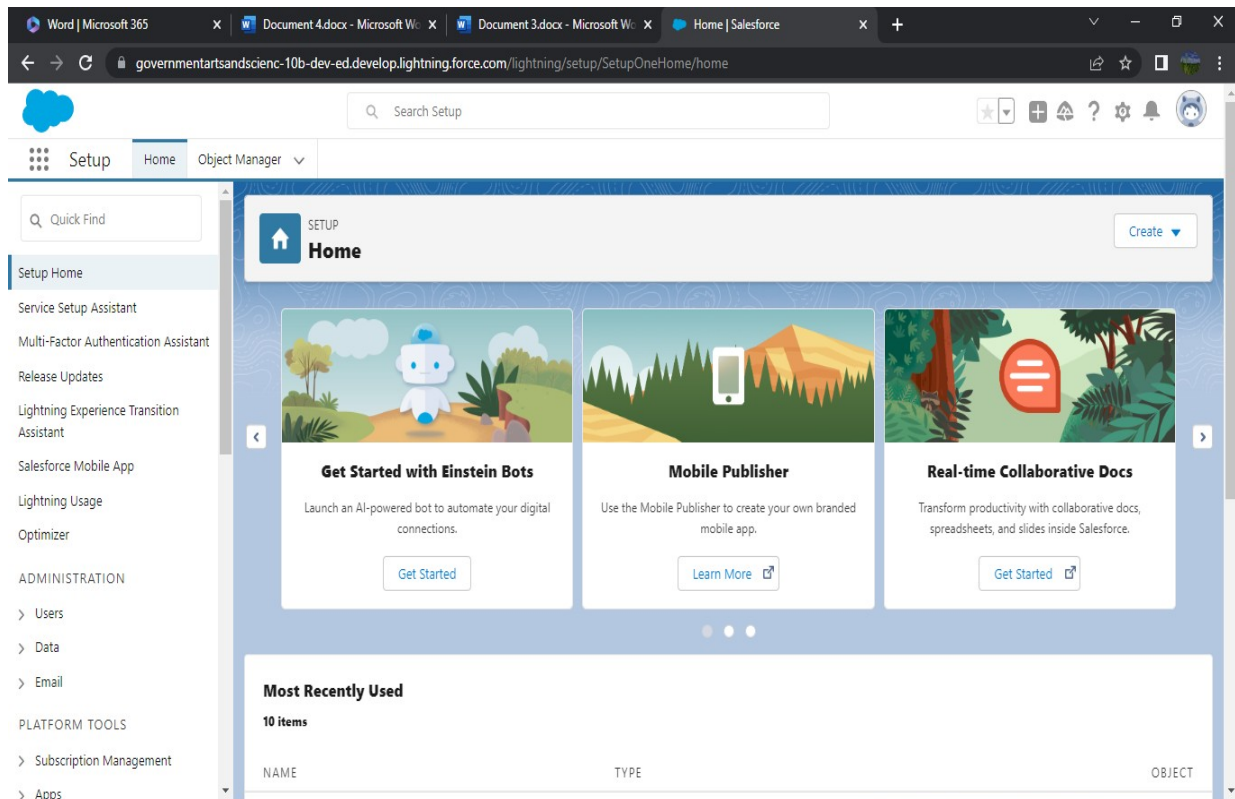
1.CREATING AN SALESFORCE ACCOUNT

we went to the website
developers.salesforce.com and signed up by giving our details

LOGIN TO SALESFORCE ACCOUNT

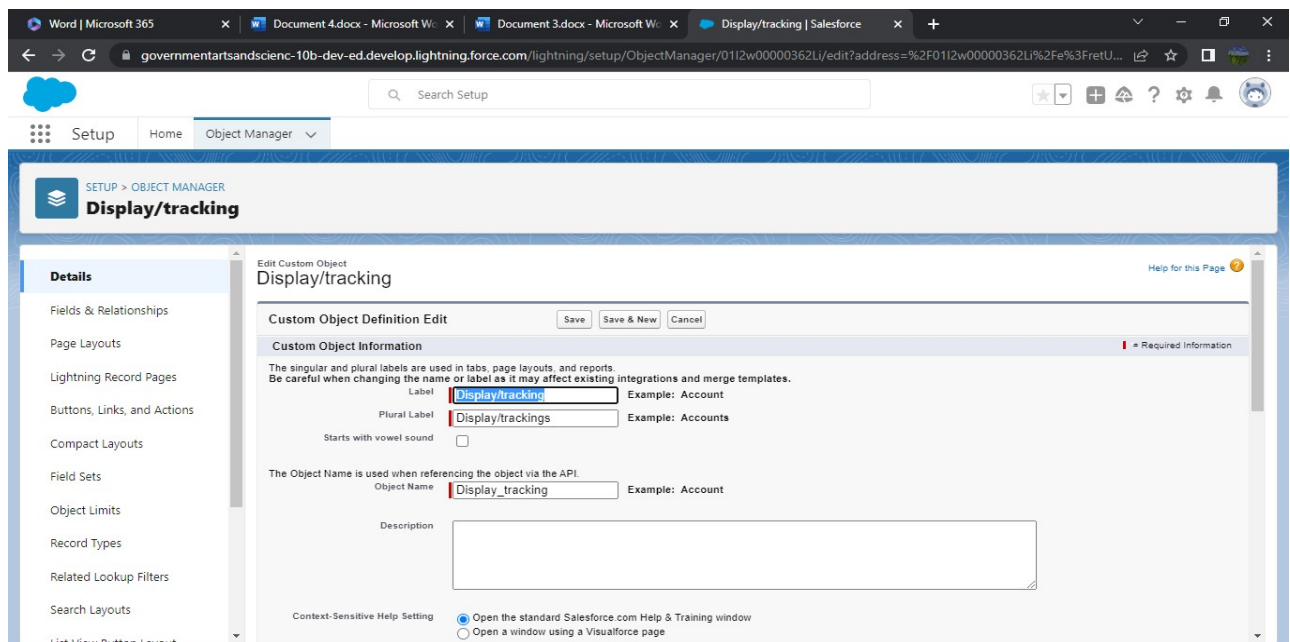
We gave our username and password which we created in the last step and
logged in the salesforce account.





OBJECT CREATION

For this Sales app, we created five objects namely,
Display/tracking



Dispatch/tracking

The screenshot shows the Salesforce Setup interface for editing a custom object named "Dispatch/Tracking". The browser address bar indicates the URL: `governmentartsandscienc-10b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w00000488YM/edit?address=%2F0112w00000488YM%2Fe%3F...`. The left sidebar contains a "Details" menu with options like "Fields & Relationships", "Page Layouts", "Lightning Record Pages", "Buttons, Links, and Actions", "Compact Layouts", "Field Sets", "Object Limits", "Record Types", "Related Lookup Filters", and "Search Layouts". The main content area is titled "Edit Custom Object Dispatch/Tracking" and includes a "Custom Object Definition Edit" section with "Save", "Save & New", and "Cancel" buttons. Below this is the "Custom Object Information" section, which contains the following fields:

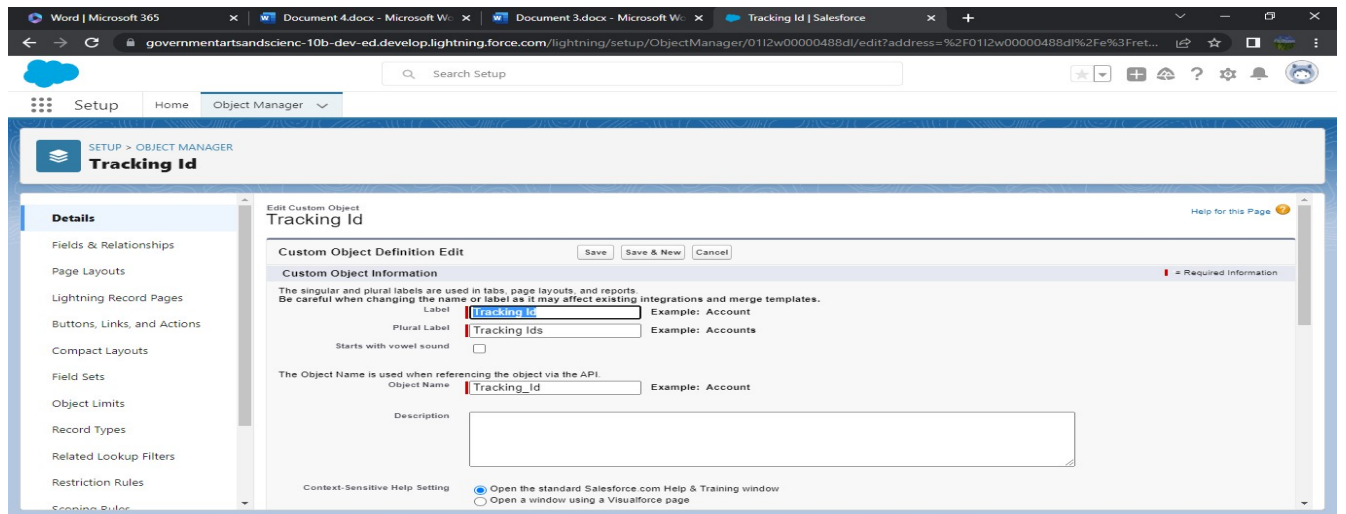
- Label:** Dispatch/Tracking (Example: Account)
- Plural Label:** Display/Trackings (Example: Accounts)
- Starts with vowel sound:** ☐
- Object Name:** Dispatch_tracking (Example: Account)
- Description:** (Empty text area)
- Context-Sensitive Help Setting:** ☒ Open the standard Salesforce.com Help & Training window (Selected), ☐ Open a window using a Visualforce page

Expected date of delivery

The screenshot shows the Salesforce Setup interface for editing a custom object named "Expected date of delivery". The browser address bar indicates the URL: `governmentartsandscienc-10b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w00000488cE/edit?address=%2F0112w00000488cE%2Fe%3F...`. The left sidebar contains a "Details" menu with options like "Fields & Relationships", "Page Layouts", "Lightning Record Pages", "Buttons, Links, and Actions", "Compact Layouts", "Field Sets", "Object Limits", "Record Types", "Related Lookup Filters", and "Search Layouts". The main content area is titled "Edit Custom Object Expected date of delivery" and includes a "Custom Object Definition Edit" section with "Save", "Save & New", and "Cancel" buttons. Below this is the "Custom Object Information" section, which contains the following fields:

- Label:** Expected date of delivery (Example: Account)
- Plural Label:** Expected date of deliveries (Example: Accounts)
- Starts with vowel sound:** ☐
- Object Name:** Expected_date_of_delivery (Example: Account)
- Description:** (Empty text area)
- Context-Sensitive Help Setting:** ☒ Open the standard Salesforce.com Help & Training window (Selected), ☐ Open a window using a Visualforce page

Tracking Id



Sales order

SETUP > OBJECT MANAGER

Sales order

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

List View Button Layout

Edit Custom Object

Sales order

Help for this Page

Custom Object Definition Edit

Save Save & New Cancel

Custom Object Information

= Required Information

The singular and plural labels are used in tabs, page layouts, and reports.
Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label

Sales order

Example: Account

Plural Label

Sales orders

Example: Accounts

Starts with vowel sound

☐

The Object Name is used when referencing the object via the API.

Object Name

Sales_order

Example: Account

Description

Context-Sensitive Help Setting

☒ Open the standard Salesforce.com Help & Training window

☐ Open a window using a Visualforce page

TAB CREATION

In the quick find box, we typed tabs and went inside it and clicked new and we gave the required details to create three tabs (Display/tracking, sales order, warehouse).

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with "tabs" entered. Under "User Interface", the "Tabs" link is highlighted. The main content area is titled "New Custom Object Tab" and shows "Step 1 of 3: Enter the Details". The form includes a dropdown for "Object" (set to "--None--"), a "Tab Style" selector, an optional "Splash Page Custom Link" dropdown (also set to "--None--"), and a text area for "Description".

The screenshot shows the "Custom Tabs" page in Salesforce Setup. It lists three custom object tabs: "Display/Trackings", "Sales orders", and "Warehouses". Each tab has a "Tab Style" (TV Widescreen, Shopping Cart, and Star respectively) and a "Description". Below the list, there are sections for "Web Tabs" and "Visualforce Tabs", both of which are currently empty.

Action	Label	Tab Style	Description
Edit Del	Display/Trackings	TV Widescreen	
Edit Del	Sales orders	Shopping Cart	
Edit Del	Warehouses	Star	

Web Tabs
No Web Tabs have been defined

Visualforce Tabs

CREATING THE RETAIL MANAGEMENT APPLICATION

In the quick find box, we typed app manager and went inside it and new lightning app and created an event management application by giving the details.

The screenshot shows the 'New Lightning App' setup screen in Salesforce. The 'App Details & Branding' section is active, with the following fields and options:

- App Name:** sales app
- Developer Name:** Enter a developer name...
- Description:** Enter a description...
- Image:** Upload button
- Primary Color Hex Value:** #0070D2
- Org Theme Options:** A slider bar with a blue circle indicating the current selection.
- Next:** A blue button at the bottom right.

The background shows a list of existing Lightning apps:

ID	Name	Label	Description	Created Date	Created By	Status
14	Sales	LightningSales	Manage your sales process with accounts, leads, opportunitie...	09/03/2023, 3:19 pm	Lightning	✓
15	sales app	sales_app		07/04/2023, 10:04 ...	Lightning	✓
16	Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple reco...	09/03/2023, 3:16 pm	Lightning	✓

The screenshot shows the 'New Lightning App' setup screen in Salesforce, with the 'Navigation and Form Factor' section active. A tooltip explains the navigation styles:

Standard navigation shows items in a navigation bar at the top of the page. Console navigation shows a list of records in a sidebar and opens each record in a new workspace tab. Also, you can select the form factors where this app is available.

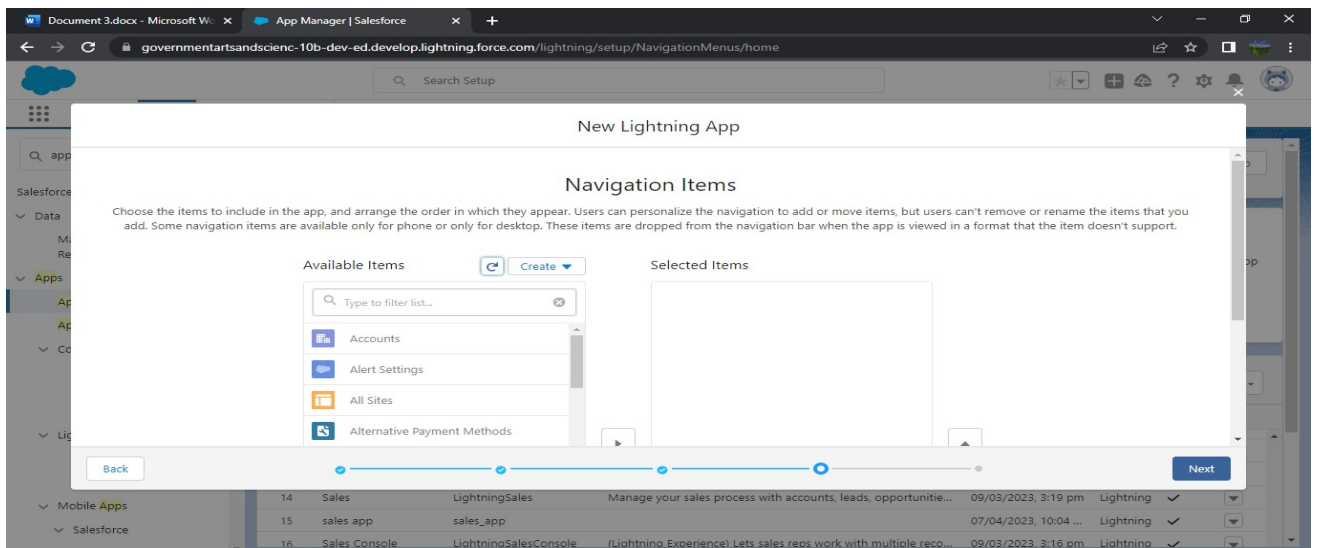
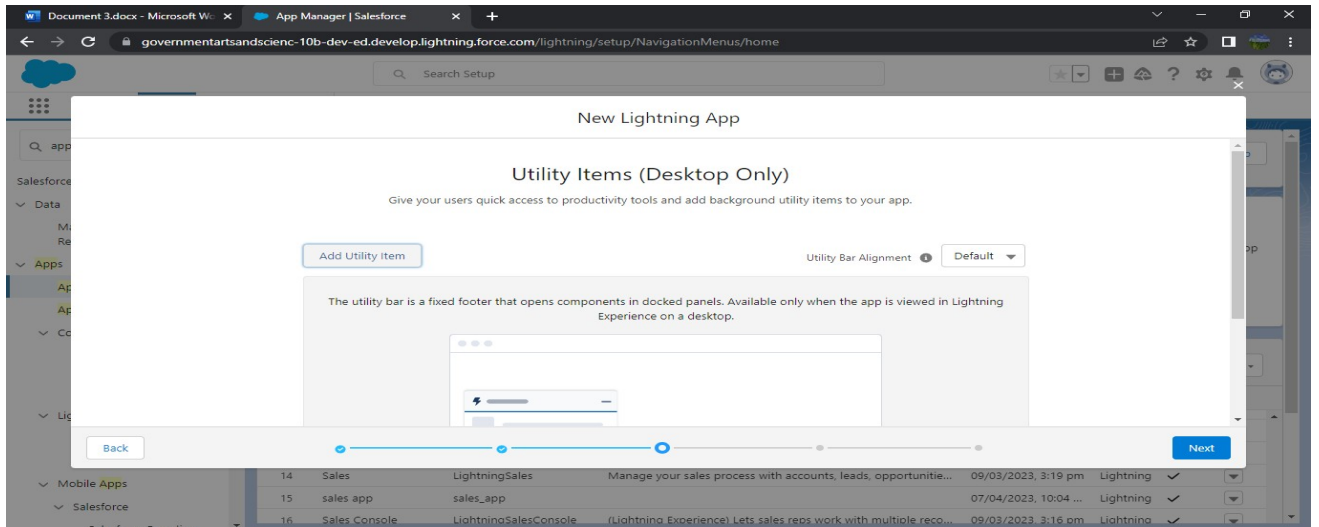
The 'Navigation and Form Factor' section includes the following options:

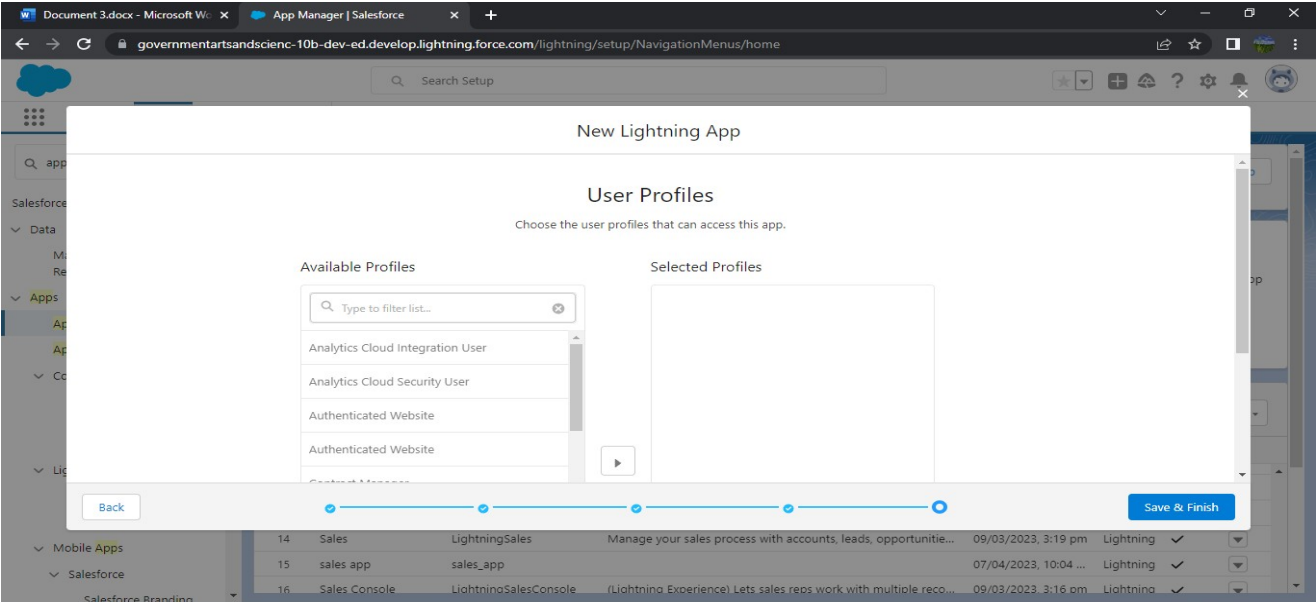
- Navigation Style:**
 - ☒ Standard navigation
 - ☐ Console navigation
- Supported Form Factors:**
 - ☒ Desktop and phone
 - ☐ Desktop
 - ☐ Phone

The 'Setup and Personalization' section includes the following options:

- Setup Experience:**
 - ☒ Setup (full set of Setup options)
 - ☐ Service Setup
- App Personalization Settings:**
 - ☐ Disable end user personalization of nav items in this app
 - ☐ Disable temporary tabs for items outside of this app

The background shows the same list of existing Lightning apps as the previous screenshot.





FIELD AND RELATIONSHIP CREATION

In fields and relationship creation we created 1 field in the event management object.

The screenshot shows the Salesforce Setup interface for the 'Dispatch/Tracking' object. The 'Fields & Relationships' section is active, displaying a list of 5 fields. The left sidebar contains navigation links for various setup areas. The main content area shows a table of fields with columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Dispatch/tracking Name	Name	Text(80)		✓
Dispatched	Dispatched__c	Checkbox		
Last Modified By	LastModifiedById	Lookup(User)		
Sales order	Sales_order__c	Master-Detail(Sales order)		✓

The screenshot shows the configuration page for the 'Dispatched' custom field. The page title is 'Dispatch/Tracking Custom Field Dispatched'. The 'Custom Field Definition Detail' section is active, showing field information and general options. The 'Field Information' section includes fields for Field Label, Field Name, API Name, Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, and Compliance Categorization. The 'General Options' section includes a Default Value field. The 'Field Dependencies' section is at the bottom.

Field Information

Field Label	Dispatched	Object Name	Dispatch/Tracking
Field Name	Dispatched	Data Type	Checkbox
API Name	Dispatched__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Sudhagar M.	Modified By	Sudhagar M.
	31/03/2023, 12:35 pm		31/03/2023, 12:35 pm

General Options

Default Value	Unchecked
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Field Dependencies

Document 3.docx - Microsoft W... Office - Enable Copy and Paste - Dispatch/Tracking | Salesforce +

governmentartsandscienc-10b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w00000488YM/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Dispatch/Tracking

Details

Fields & Relationships
5 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Dispatch/tracking Name	Name	Text(80)		✓
Dispatched	Dispatched__c	Checkbox		
Last Modified By	LastModifiedById	Lookup(User)		
Sales order	Sales_order__c	Master-Detail(Sales order)		✓

Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout

Document 3.docx - Microsoft W... Office - Enable Copy and Paste - Dispatch/Tracking | Salesforce +

governmentartsandscienc-10b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w00000488YM/FieldsAndRelationships/00N2w00000Z0ga...

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Dispatch/Tracking

Details

Fields & Relationships

Dispatch/Tracking Custom Field
Sales order
[Back to Dispatch/Tracking](#)

[Validation Rules \(0\)](#)

Custom Field Definition Detail

Edit Set Field-Level Security View Field Accessibility Where is this used?

Field Information

Field Label	Sales order	Object Name	Dispatch/Tracking
Field Name	Sales_order	Data Type	Master-Detail
API Name	Sales_order__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Sudhagar M. 31/03/2023, 1:06 pm	Modified By	Sudhagar M. 31/03/2023, 1:06 pm

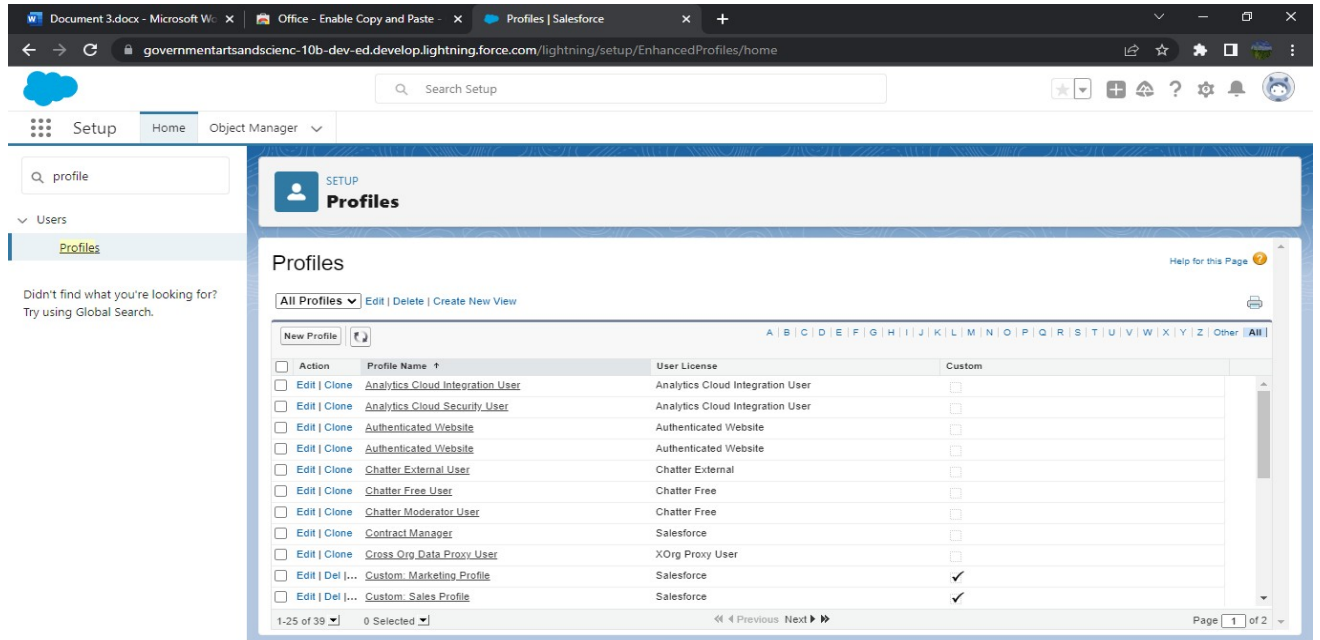
Master-Detail Options

Related To	Sales_order	Child Relationship Name	Display_Trackings
Related List Label	Display/Trackings		
Sharing Setting	Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.		

Windows Taskbar: ENG 7:52 PM IN 4/17/2023

PROFILE CREATION

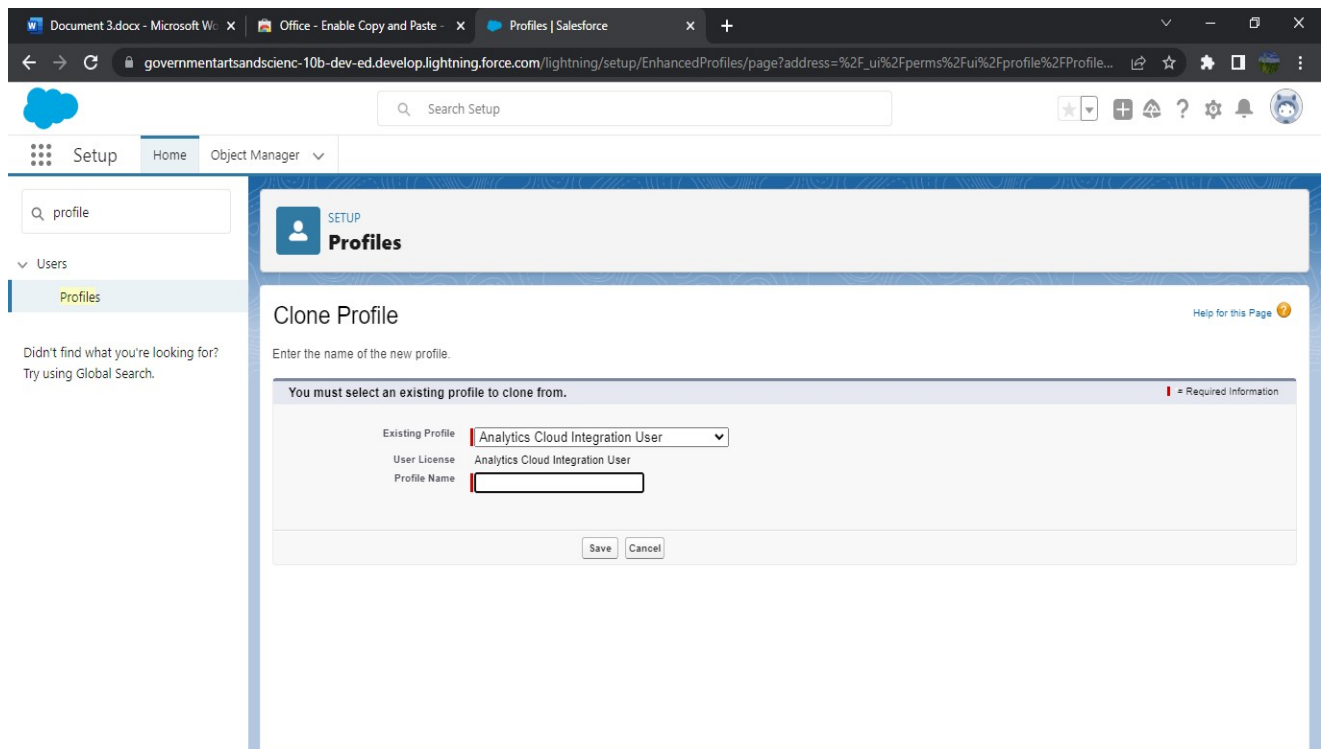
We created a profile. A profile can be assigned to many users, but the user can be assigned a single profile at a time.



The screenshot shows the Salesforce Setup interface for Profiles. The left sidebar contains a search bar with "profile" and a list of navigation items: Users, Profiles, and a message "Didn't find what you're looking for? Try using Global Search." The main content area is titled "Profiles" and includes a "New Profile" button. Below this is a table of existing profiles.

Action	Profile Name	User License	Custom
Edit Clone	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
Edit Clone	Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
Edit Clone	Chatter External User	Chatter External	<input type="checkbox"/>
Edit Clone	Chatter Free User	Chatter Free	<input type="checkbox"/>
Edit Clone	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
Edit Clone	Contract Manager	Salesforce	<input type="checkbox"/>
Edit Clone	Cross Org Data Proxy User	XOrg Proxy User	<input type="checkbox"/>
Edit Del ...	Custom_Marketing_Profile	Salesforce	<input checked="" type="checkbox"/>
Edit Del ...	Custom_Sales_Profile	Salesforce	<input checked="" type="checkbox"/>

At the bottom of the table, it says "1-25 of 39" and "0 Selected".



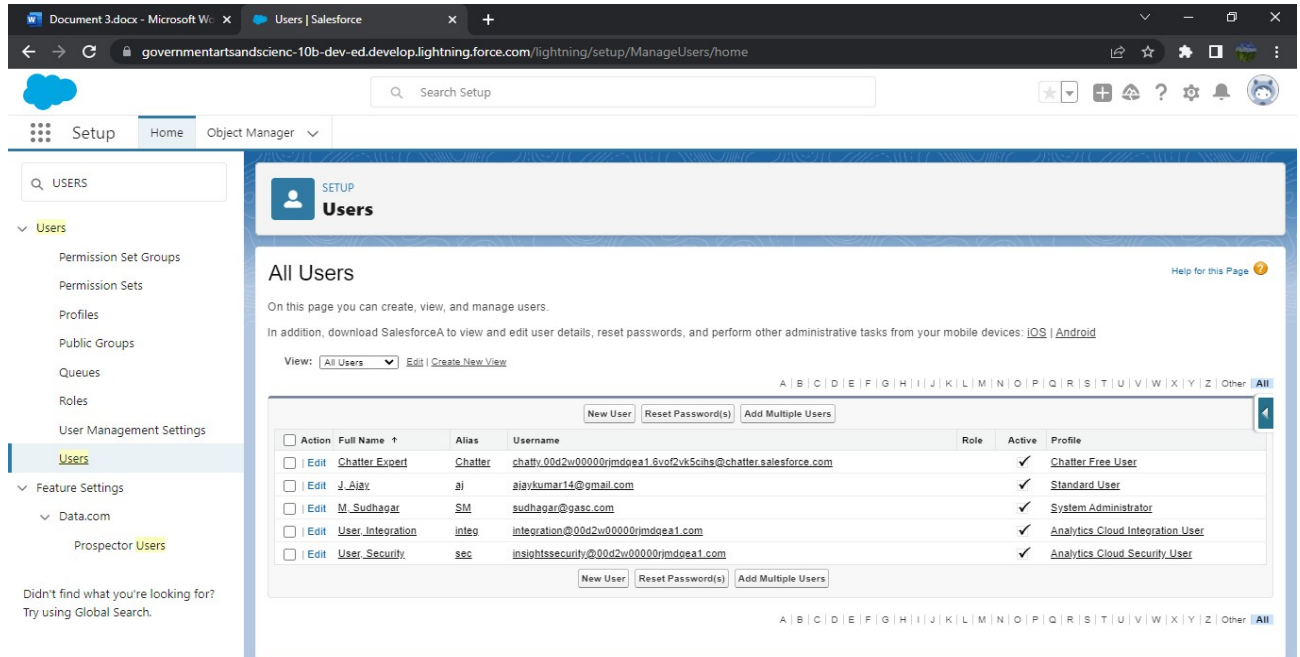
The screenshot shows the "Clone Profile" dialog in the Salesforce Setup interface. The dialog prompts the user to "Enter the name of the new profile." and states "You must select an existing profile to clone from." Below this, there is a form with the following fields:

- Existing Profile: Analytics Cloud Integration User (selected from a dropdown)
- User License: Analytics Cloud Integration User
- Profile Name: (empty text input field)

At the bottom of the dialog are "Save" and "Cancel" buttons.

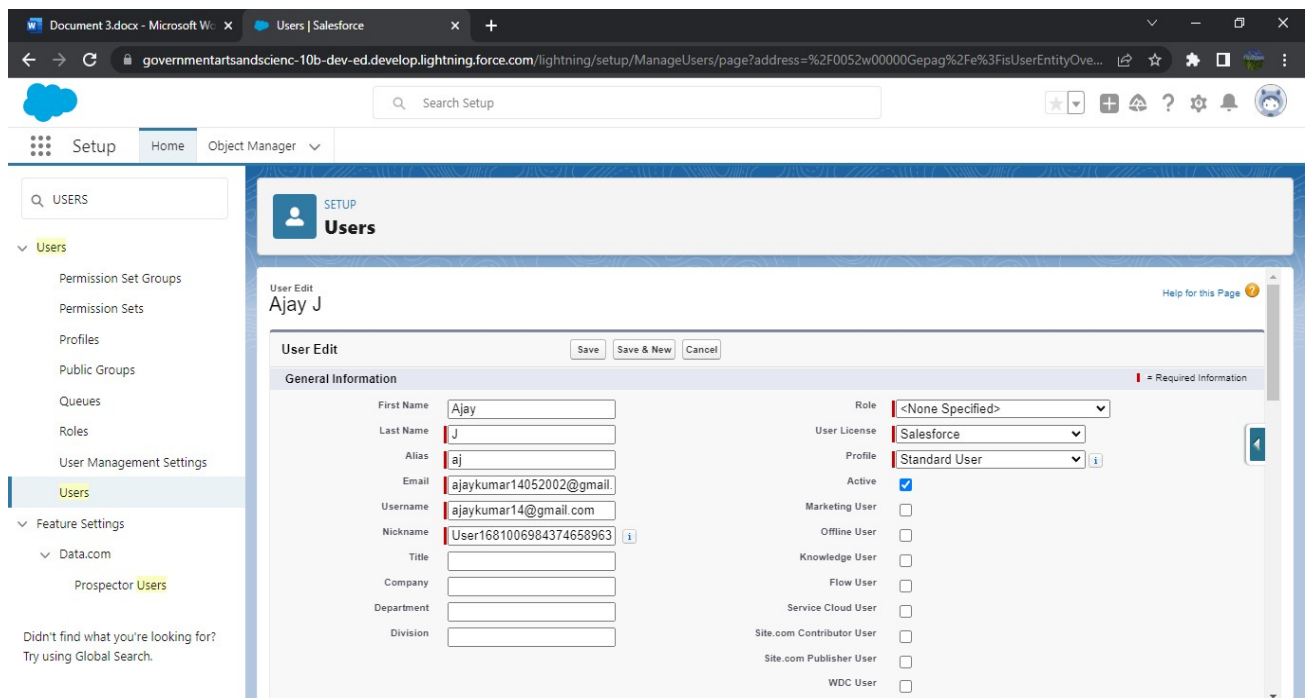
CREATION OF USERS

The user account identifies the user, and the user account settings determine what features and records the user can access.



This screenshot shows the 'All Users' page in the Salesforce Setup menu. The left sidebar contains navigation options like 'Users', 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', and 'User Management Settings'. The main content area is titled 'All Users' and includes a search bar, a 'View' dropdown set to 'All Users', and a table of users. The table has columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The users listed are Chatter Expert, J. Jay, M. Sudhagar, User Integration, and User Security. Below the table are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'.

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatter.00d2w00000rmdoea1.6vof2v5cihs@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
Edit	J. Jay	aj	ajaykumar14@gmail.com		<input checked="" type="checkbox"/>	Standard User
Edit	M. Sudhagar	SM	sudhagar@gasc.com		<input checked="" type="checkbox"/>	System Administrator
Edit	User Integration	inteo	integration@00d2w00000rmdoea1.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Edit	User Security	sec	insightssecurity@00d2w00000rmdoea1.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User



This screenshot shows the 'User Edit' page for a user named 'Ajay J'. The left sidebar is the same as the previous screenshot. The main content area is titled 'User Edit' and includes a 'General Information' section with fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. The 'Role' dropdown is set to '<None Specified>', 'User License' is 'Salesforce', and 'Profile' is 'Standard User'. The 'Active' checkbox is checked. There are buttons for 'Save', 'Save & New', and 'Cancel' at the top of the form.

Field	Value
First Name	Ajay
Last Name	J
Alias	aj
Email	ajaykumar14052002@gmail.com
Username	ajaykumar14@gmail.com
Nickname	User1681006984374658963
Title	
Company	
Department	
Division	
Role	<None Specified>
User License	Salesforce
Profile	Standard User
Active	<input checked="" type="checkbox"/>
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>
Site.com Publisher User	<input type="checkbox"/>
WDC User	<input type="checkbox"/>

TRAILHEAD PROFILE PUBLIC URL

TEAM LEADER : M.SUDHAGAR ; <https://trailblazer.me/id/sudhm31>

TEAM MEMBER 1: J.AJAY

TEAM MEMBER 2: S.ESAKKILAKSHMI

TEAM MEMBER 3: M.VANITHA

ADVANTAGES

- Requires less capital.
- More profit margin than wholesalers.
- Better customer relations.
- Credit facility.
- Make it easy to pay.

DISADVANTAGES

- Requires more marketing costs.
- Good selling skills are required.
- High competition.
- No benefit of bulk buying.
- Lack of initiative.

APPLICATION

A retail management system (RMS) is a platform that combines several modules to aid in the day-to-day operation of a retail store or chain, such as managing and buying inventory, checking out customers, scheduling employee shifts, keeping track of finances.

CONCLUSION

We have explored the meaning of the terms retailing, marketing and marketing communications. We have also considered the importance of the marketing mix and identified the different communication tools that a retailer might use to interact and communicate with their target customers. You have been introduced to a few theoretical concepts and ideas, which have been illustrated using real world examples and cases in retailing. You have been introduced to some of the key areas of marketing communications – message, the media and the communication tools.

SCOPES

Retail management has become one of the fastest-growing occupations in the industry as the economy has grown significantly. The retail industry in India is the most appealing and fastest growing in the world, demanding an increase in competent expertise in this discipline.