

CHIKKANNA GOVERNMENT ARTS COLLEGE TIRUPPUR-641602

(AFFILIATED TO BHARATHIYAR UNIVERSITY)



BACHELOR OF SCIENCE IN PHYSICS

Naan mudhalvan project title: **RETAIL MANEAGEMENT
APPLICATION USING SALESFORCE**

Submitted by

TEAM LEADER:

VEERAMANI S (2022C0027)

TEAM MEMBERS:

- 1.SANJAY P (2022C0023)
- 2.SOUNDHAR M (2022C0024)
- 3.SRIDHAR R (2022C0025)
- 4.VALLARASU A (2022C0026)

NAAN MUDHALVAN PROJECT WORK

**TITLE: RETAIL MANEGEMENT APPLICATION
USING SALESFORCE**

This is to certify that this is a Bonafide record of work done by the above students of III B.Sc. PHYSICS Degree NAAN MUDHALVAN PROJECT during the year 2023

Submitted for the Naan Mudhalvan project work held
on 21.04.2023

MENTOR

INDEX

S.NO	CONTENTS
1.	INTRODUCTION
2.	PROBLEM DEFINITION & DESIGN THINKING
3.	RESULT
4.	TRAILDHEAD PROFILE PUBLIC URL
5.	ADVANTAGES & DISADVANTAGE
6.	APPLICATION
7.	CONCLUSION
8.	FUTURE SCOPE

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 products owner has requested to create two applications, one is a sales app for sales reps to use this applications and store customers data, and the second applications 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 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:



2.2 IDEATION & BRAINSTORMING MAP:

1

Define your problem statement
What problem are you trying to solve? Frame your problem as a How Might We statement. This will be the focus of your brainstorm.
⌚ 5 minutes

PROBLEM

How might we [your problem statement]?

Key rules of brainstorming

To run an smooth and productive session

Stay in topic.

Defer judgment.

Go for volume.

Encourage wild ideas.

Listen to others.

If possible, be visual.

2

Brainstorm
Write down any ideas that come to mind that address your problem statement.
⌚ 10 minutes

TIP

You can select a sticky note and hit the pencil (switch to sketch) icon to start drawing!

VEERAMANI S

INCLUDE MORE PRODUCTS

VARIETY OF OPTIONS AND SECURES

EASY ACCESSIBILITY

PAIDMENTS ASSISTANCE

EASY PAYMENT

OFFLINE COURSE PLACING

EASY SHOP DELIVERY

AVAILABLE IN VARIOUS AREAS

ONLINE DELIVERY

CASHBACK OFFER

LOW PRICE

HIGH QUALITY

VALLARASU A

IMPROVED PRODUCT AVAILABILITY

FESTIVAL OFFERS

PERSONALIZED RECOMMENDATIONS

Person 6

Person 7

Person 8

→

3. RESULT:

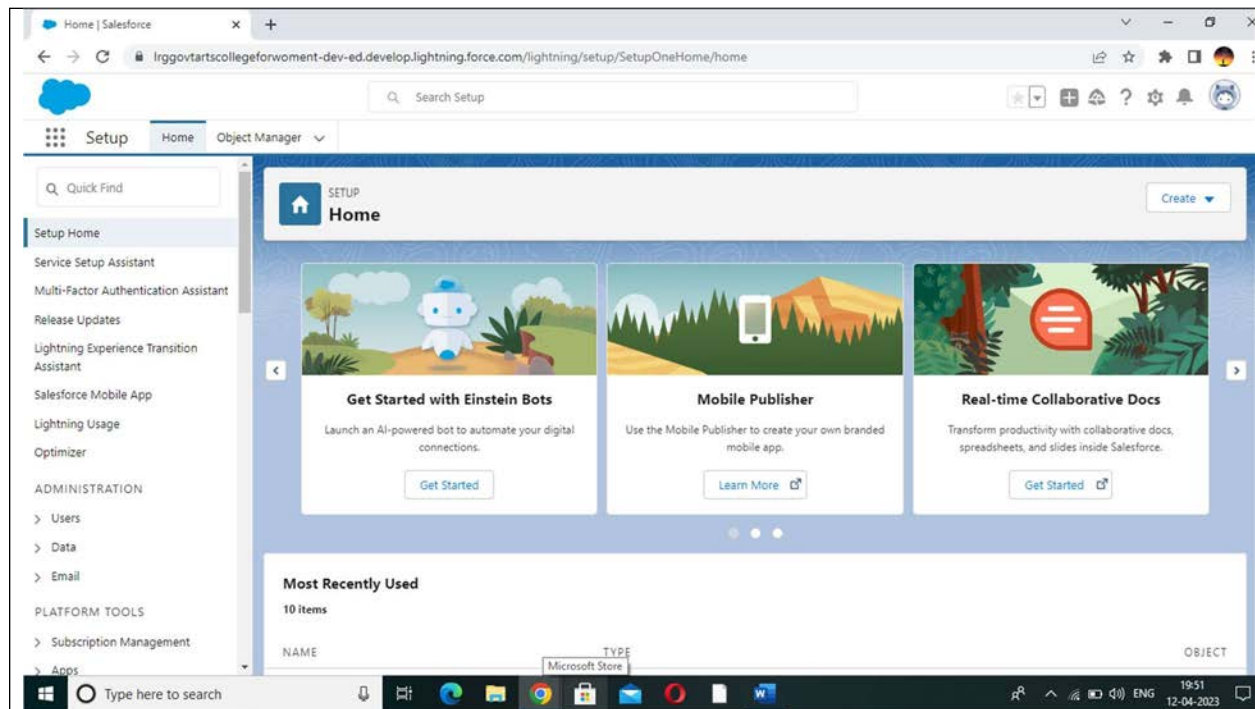
3.1. Object and fields:

OBJECT NAME	FIELDS IN THE OBJECT	
STOCKS AVAILABLES	FIELD LABLES	DATA TYPES
	Product name	Master detail (Product)
	Warehouse	Master detail (Warehouse)
WAREHOUSE	FIELD LABLES	DATA TYPES
	Warehouse name	Text (80)
	Stocks available	Master detail (Stocks available)
CONTACT	FIELD LABLES	DATA TYPES
	Account website	Formula (Text)
	Contact name	Text (80)

3.2 ACTIVITY & SCREENSHOT:

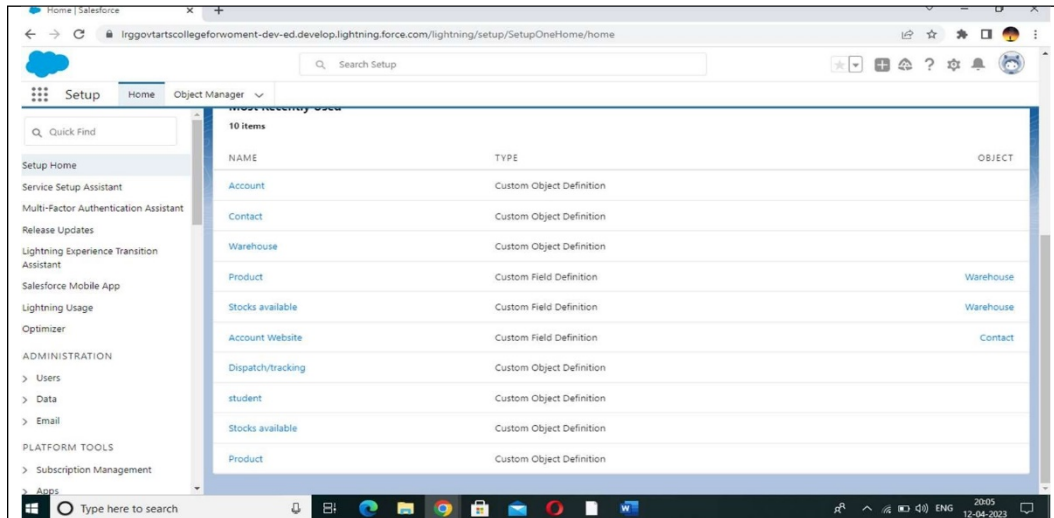
Milestone 1:

Create a developer account.

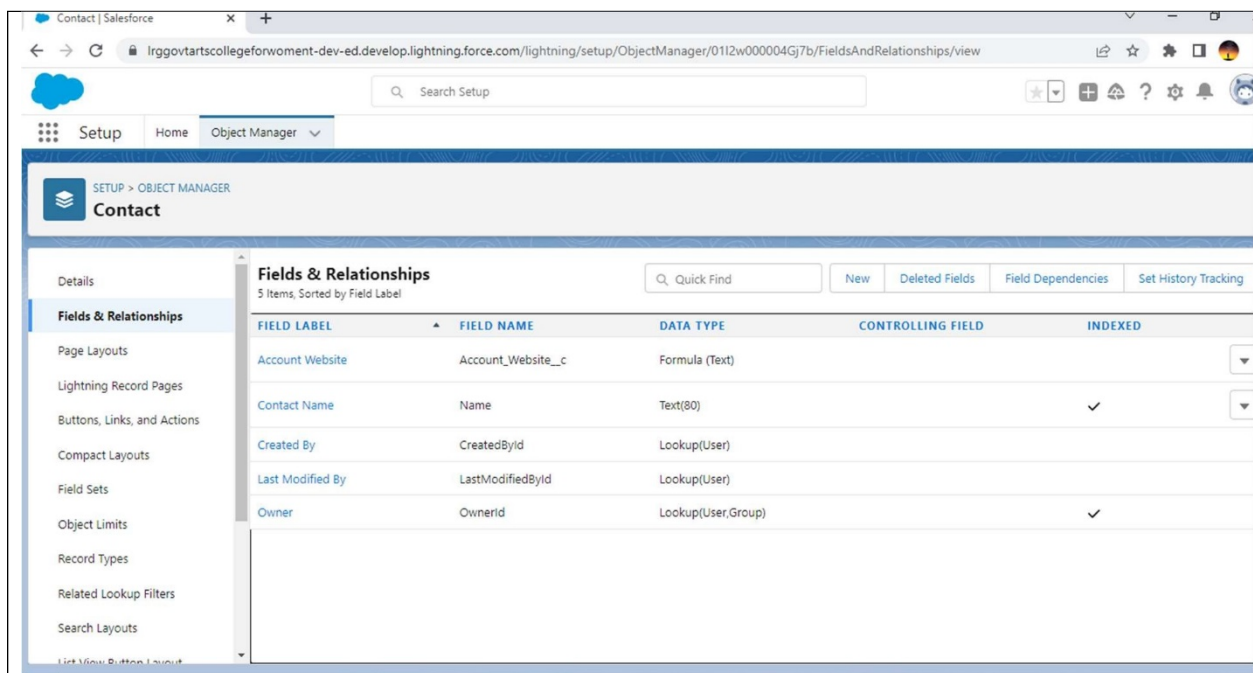


Milestone 2:

1. Create objects.

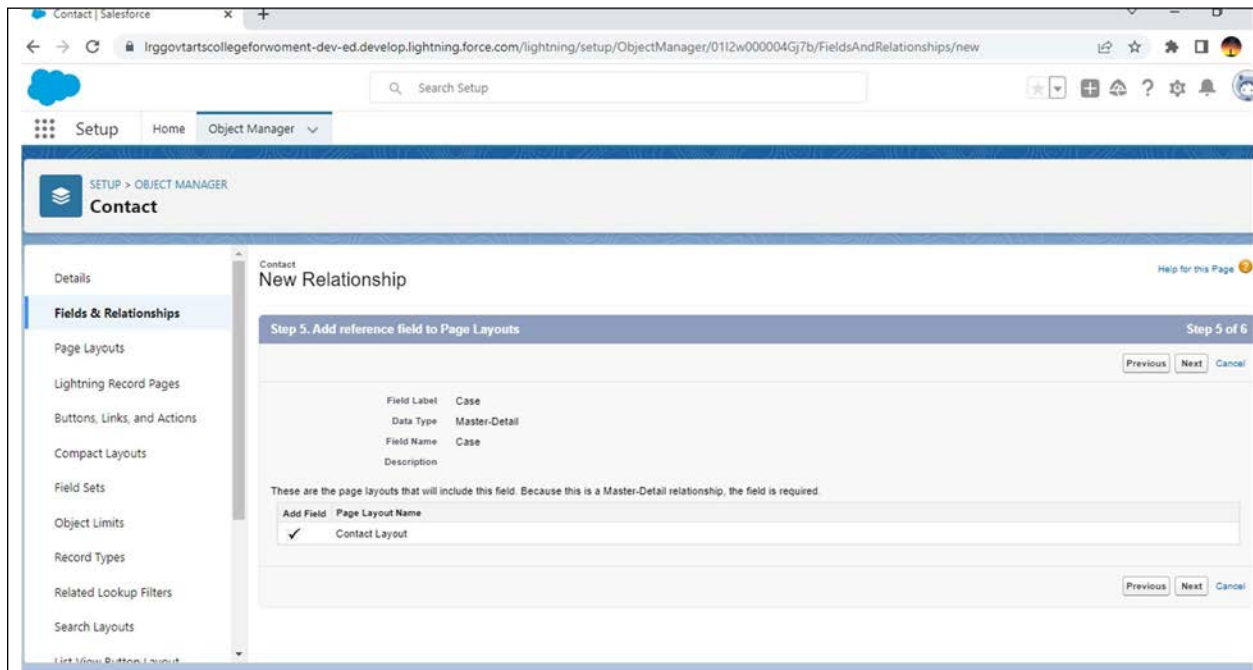


2. Fields available on object (contact).



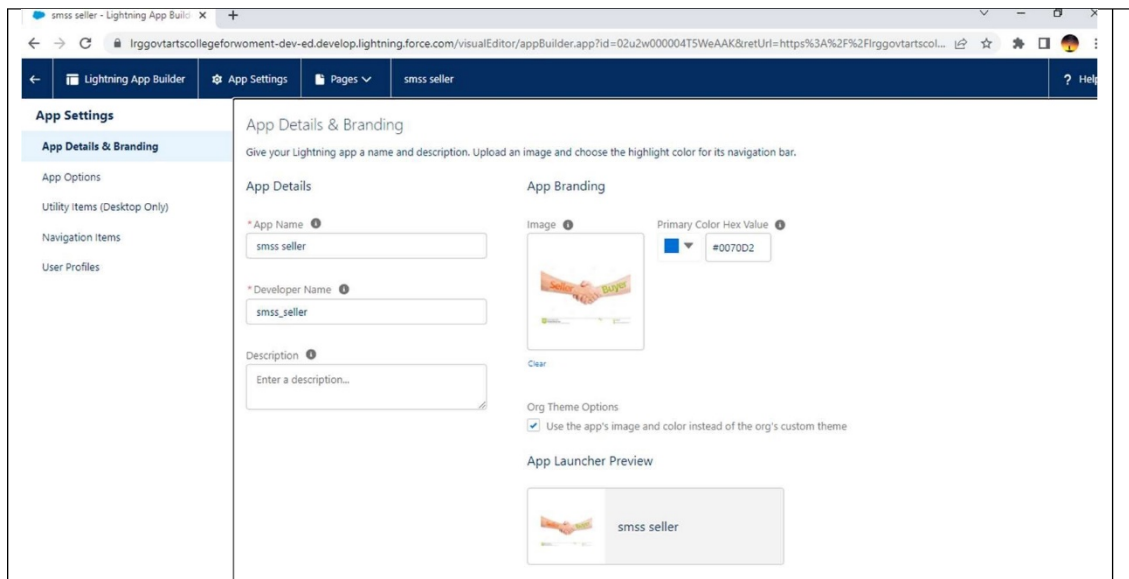
Milestone 3:

Relation between objects.



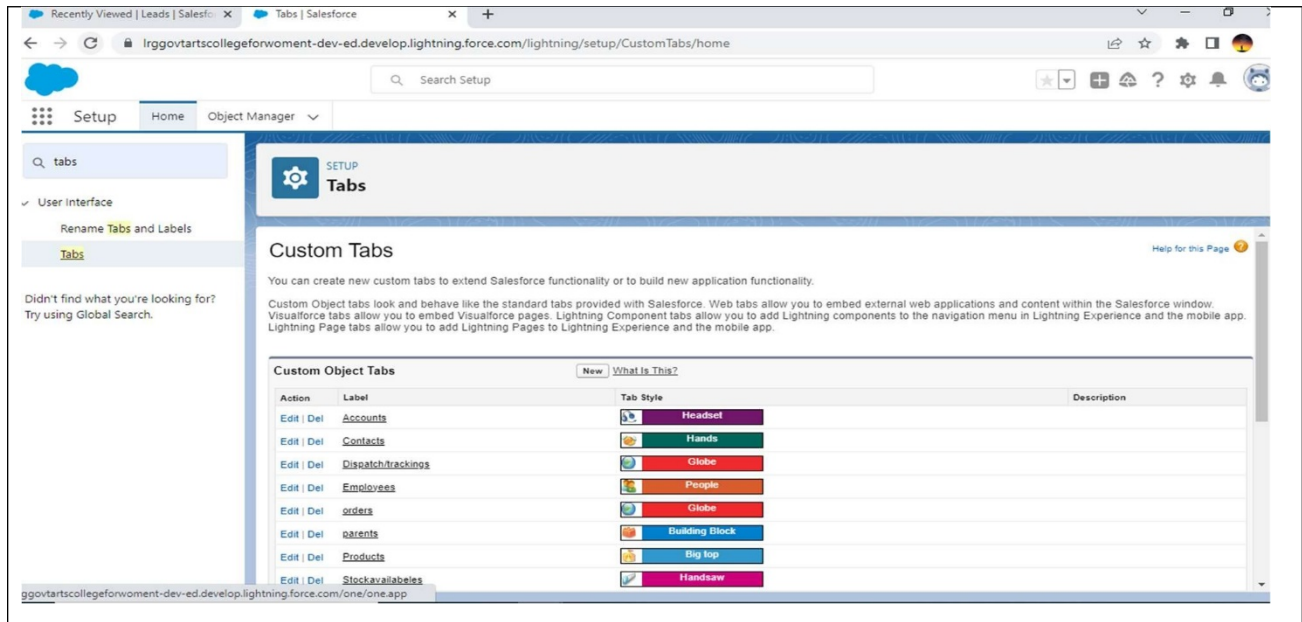
Milestones 5:

1. Creation of Application.



Milestone 5: Layouts

1. Creation of custom tabs

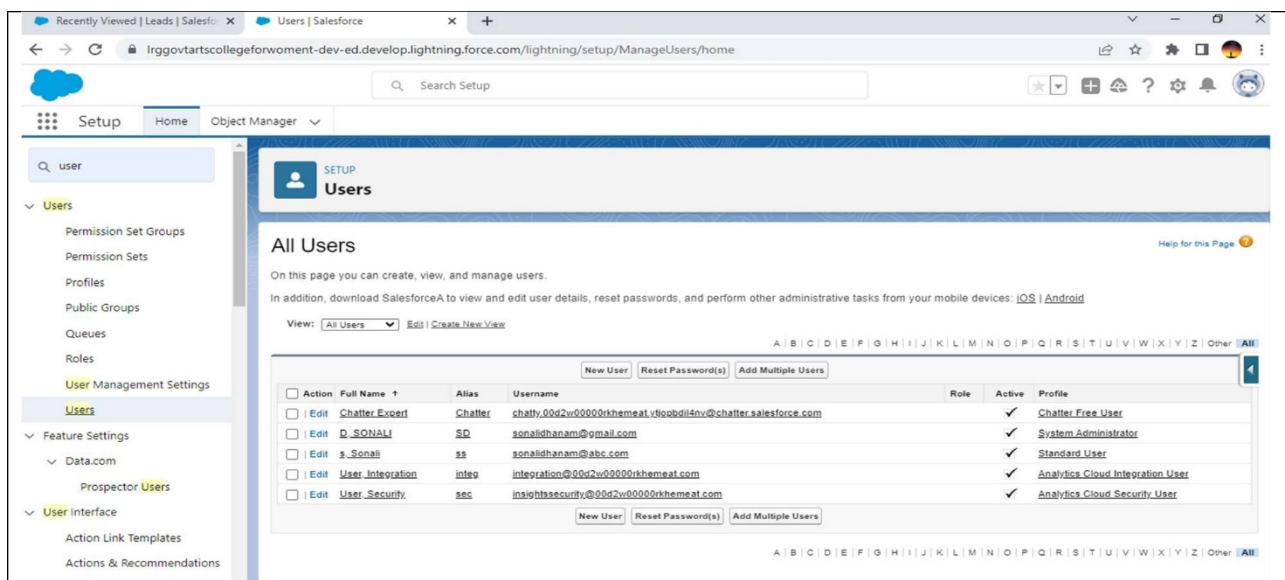


The screenshot shows the Salesforce Setup page for Custom Tabs. The left sidebar contains a search bar with 'tabs' entered and a list of navigation items: 'User Interface', 'Rename Tabs and Labels', and 'Tabs'. The main content area is titled 'Custom Tabs' and includes a 'New' button and a 'What is This?' link. Below this is a table of Custom Object Tabs.

Action	Label	Tab Style	Description
Edit Del	Accounts	Headset	
Edit Del	Contacts	Hands	
Edit Del	Dispatch/trackings	Globe	
Edit Del	Employees	People	
Edit Del	orders	Globe	
Edit Del	parents	Building Block	
Edit Del	Products	Big top	
Edit Del	Stockavailabilities	Hand saw	

Milestone 6: user

Creation of user



The screenshot shows the Salesforce Setup page for Users. The left sidebar contains a search bar with 'user' entered and a list of navigation items: 'Users', 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', 'Users', 'Feature Settings', 'Data.com', 'Prospector Users', 'User Interface', 'Action Link Templates', and 'Actions & Recommendations'. The main content area is titled 'All Users' and includes a 'View' dropdown set to 'All Users' and a 'Create New User' link. Below this is a table of users.

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatter.00d2v00000khemeat@chatter.salesforce.com		✓	Chatter Free User
Edit	D. SONALI	SD	sonalidhanam@gmail.com		✓	System Administrator
Edit	s. Sonali	ss	sonalidhanam@abc.com		✓	Standard User
Edit	User Integration	integ	integration@00d2v00000khemeat.com		✓	Analytics Cloud Integration User
Edit	User Security	sec	insightsecurity@00d2v00000khemeat.com		✓	Analytics Cloud Security User

Milestone 7:

Validation Rules

The screenshot shows the Salesforce Object Manager interface for an Account Validation Rule. The rule is named "Phone_number_has_international_format" and is active. The error condition formula is "LEFT(Name, 1) <> '+'". The error message is "Phone number must begin with + (country code)". The error location is "Top of Page". The rule was created by "SONALI.D." on 12/04/2023 at 8:55 pm and was modified by the same user at the same time.

Validation Rule Detail

Field	Value
Rule Name	Phone_number_has_international_format
Active	<input checked="" type="checkbox"/>
Error Condition Formula	LEFT(Name, 1) <> '+'
Error Message	Phone number must begin with + (country code)
Error Location	Top of Page
Description	
Created By	SONALI.D. 12/04/2023, 8:55 pm
Modified By	SONALI.D. 12/04/2023, 8:55 pm

Creation of cross object

The screenshot shows the Salesforce Object Manager interface for the Warehouse object, specifically the "Fields & Relationships" section. The table lists 5 items, sorted by Field Label. The fields are: Created By (Lookup(User)), Last Modified By (Lookup(User)), Product (Master-Detail(Product)), Stocks available (Master-Detail(Stocks available)), and Warehouse Name (Text(80)).

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Product	Product__c	Master-Detail(Product)		<input checked="" type="checkbox"/>
Stocks available	Stocks_available__c	Master-Detail(Stocks available)		<input checked="" type="checkbox"/>
Warehouse Name	Name	Text(80)		<input checked="" type="checkbox"/>

Milestone 7:

Creation of report.

The screenshot displays the Salesforce Report Builder interface. The report is titled "Product with stock availability" and is grouped by "Warehouses". The report preview shows a table with columns for product name, warehouse name, and stock available. The data is grouped by warehouse, with subtotals for each group. The report is currently in preview mode, showing a limited number of records.

Report Details:

- Report Title:** Product with stock availability
- Grouping:** Warehouses
- Columns:** product name, Warehouse: Warehouse Name, stock available
- Row Counts:** 4

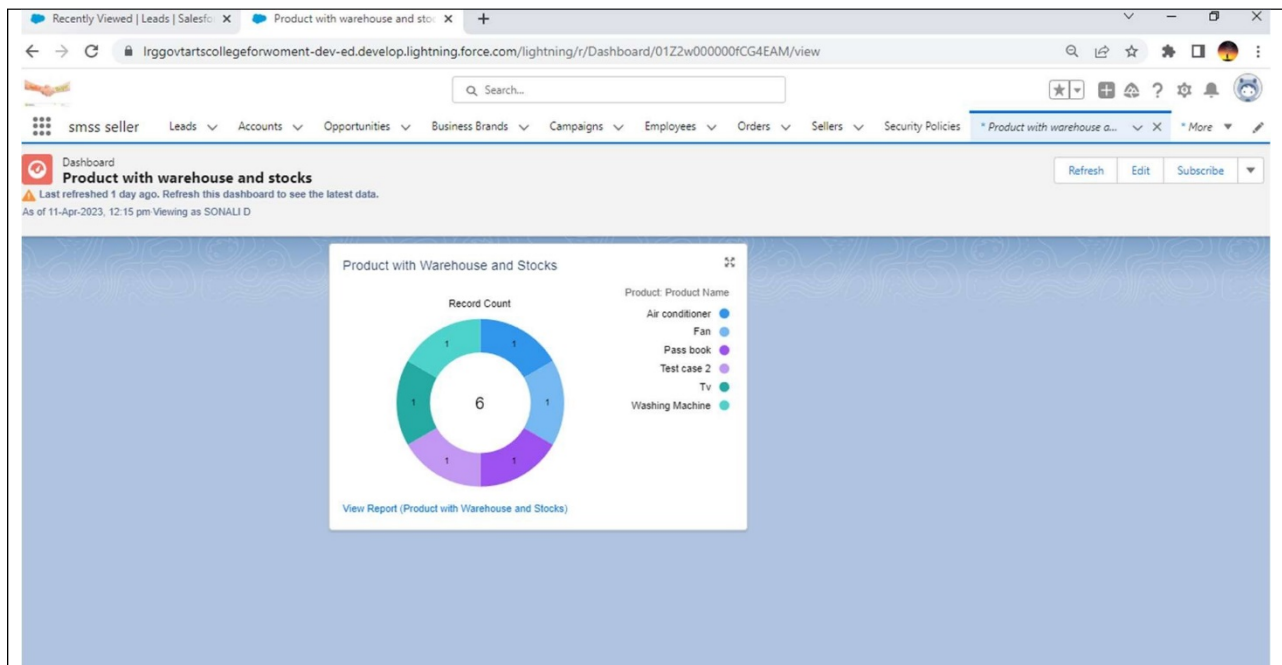
product name	Warehouse: Warehouse Name	stock available
air conditioner (1)	Chennai	4
Subtotal		
Fan (1)	Hyderabad	3
Subtotal		
Refrigrator (1)	Mumbai	6
Subtotal		
washing machine (1)	Kolkata	2
Subtotal		
Total (4)		

Report Builder Interface:

- Outline:** Shows the report structure with groups and columns.
- Filters:** 1 filter applied.
- Columns:** Warehouse: Warehouse Name, stock available.
- Row Counts:** 4.
- Detail Rows:** 4.
- Subtotals:** 4.
- Grand Total:** 4.

Milestone 8: Dashboard

Creation of dashboards



4. TRAILHEAD PROFILE PUBLIC URL:

Team leader - <https://trailblazer.me/id/veers20>

Team Member 1 - <https://trailblazer.me/id/sanjay110>

Team Member 2 - <https://trailblazer.me/id/sou2002>

Team Member 3 - <https://trailblazer.me/id/sridr17>

Team Member 4 - <https://trailblazer.me/id/valla106>

5. ADVNTANGES & DISADVANTAGES:

Advantages of the project:

- Trustworthy reporting.
- Dashboards that visually showcase data.
- Improved messaging with automation.
- Proactive service.
- Efficiency enhanced by automation.
- Simplified collaboration.
- Better customer retention.

Disadvantages of the project:

- Discount expectation by small investors.
- Require culture change among the consumers.
- Changing Preference.
- False rumors.

6.APPLICATIONS:

- ❖ This article is for small business owners and marketers who want to learn about the benefits of CRM software for small businesses.
- ❖ CRM software is used to gather customer interactions in one central place to improve customer experience and satisfaction.
- ❖ CRM is one of the world's fastest-growing industries, expected to grow at a rate of 14% between 2021 and 2027.
- ❖ The benefits of CRM include better customer retention, increased sales and detailed analytics.

7.CONCLUSION:

The project is completed successfully as per the given topic requirement. This will facilitate the small vendors go for online business and simplification of the business process. In depth analysis of the current system was done. Information gathering tools such as interviews, observation and questionnaires were used to understand the current system and identify requirements. Context diagrams, and data flow diagrams were used to analysis the processes of the current system. A use case diagram was used to determine the system functional requirements of the proposed system. System requirements and user requirements will be used to determine more detailed specifications of the functionalities of the system and how the system operates.

FUTURE WORKS

- ❖ This will facilitate the small business venders go for online business and simplification of the business process. This will be upgraded with more features and option in the future so that the retail management will have more business growth and hence profits.

- ❖ It will be further upgraded for online delivery access and similar methods like Internet of Things.
