A CRM Application on E-Commerce Activities

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PROJECT REPORT

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SALEM – 637504.

ANNA UNIVERSITY : CHENNAI 600025

BONAFIDE CERTIFICATE

Certified that this the project report titled **"A CRM Application on E-Commerce Activities"** is the bonafide work of **"SANJAI P (611220205030), KANESHK P.M (611220205014), BOOPATHI S (611220205001),** and **SRIRAM R (611220205037)"** who carried out the project work under my supervision.

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ACKNOWLEDGEMENT

At the outset, we express our heartfelt gratitude to god, who has been our strength to bring this project to light.

At this pleasing moment of having successfully completed our project, we wish to convey our sincere thanks and gratitude to our beloved president **Mr.C.BALAKRISHNAN,** who has provided all the facilities to us.

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LIST OF FIGURES

LIST OF ABBREVIATION

CRM	Customer Relationship Management
ESP	Email Service Provider
UI	User Interface
UX	User Experience
OWD	Org - Wide Default
CTA	Call To Action
CSV	Comma - Separated Values
SLA	Service Level Agreement
API	Application Programming Interface
SaaS	Software as a Service
PaaS	Platform as a Service

CHAPTER-1

PROJECT SPECIFICATION

1.1 Project Goal

The goal of a Salesforce CRM application for e-commerce activities is to streamline and enhance the management of customer relationships within the e-commerce ecosystem. This includes the tracking of customer interactions, order history, and preferences, allowing for personalized marketing and customer support. By centralizing customer data, the project aims to improve customer engagement, drive sales, and ultimately boost the e-commerce business's profitability.

Furthermore, the project seeks to leverage Salesforce's robust features for automation, reporting, and analytics to optimize sales and marketing efforts. This entails implementing lead and opportunity management, email marketing, and customer service solutions, all within the Salesforce platform, to drive higher conversion rates and deliver a seamless and satisfying e-commerce experience for customers. In summary, the project's primary goal is to leverage Salesforce CRM to maximize efficiency and revenue in e-commerce operations through superior customer relationship management.

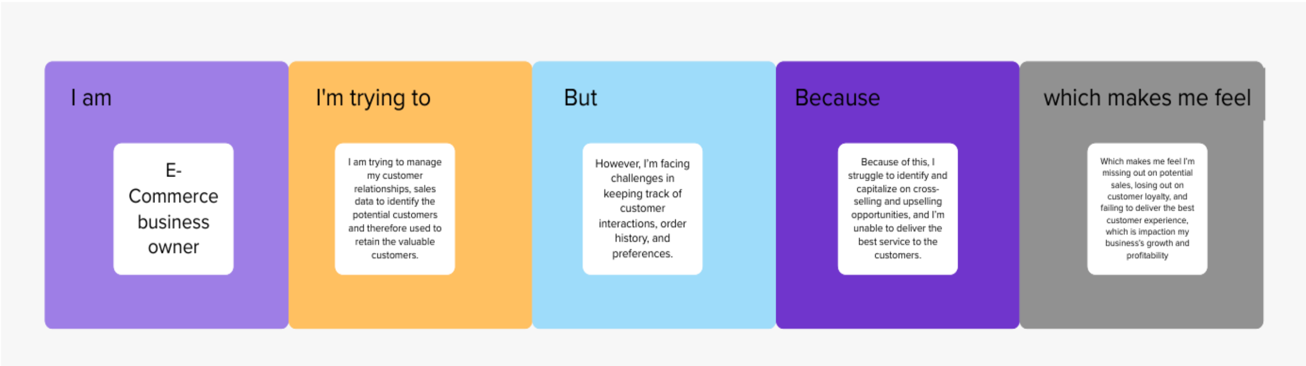
1.2 Project Scope

Developing a CRM application for e-commerce activities within the Salesforce ecosystem involves a multifaceted project scope. This initiative is focused on creating a robust platform that enables businesses to effectively manage and optimize customer interactions and transactions in the e-commerce domain. It includes features such as customer profile management, order processing, inventory tracking, and integration with customer support functions, all seamlessly integrated with Salesforce's CRM capabilities.

Moreover, the project scope encompasses the implementation of advanced CRM features, including lead and opportunity management, email marketing automation, and customer segmentation. This empowers businesses to personalize marketing strategies, boost customer engagement, and enhance the overall e-commerce experience. The project also necessitates data synchronization between the e-commerce platform and Salesforce CRM to provide real-time insights into customer behavior and sales trends, enabling data-driven decision-making and ultimately improving customer acquisition, retention, and overall business success.

To ensure the successful deployment of this CRM application, the project involves user training, system customization, and ongoing support. This comprehensive approach ensures that the Salesforce CRM solution becomes a central and indispensable component of the e-commerce ecosystem, facilitating businesses in achieving their sales and customer relationship management objectives.

1.3 Problem Statement Definition

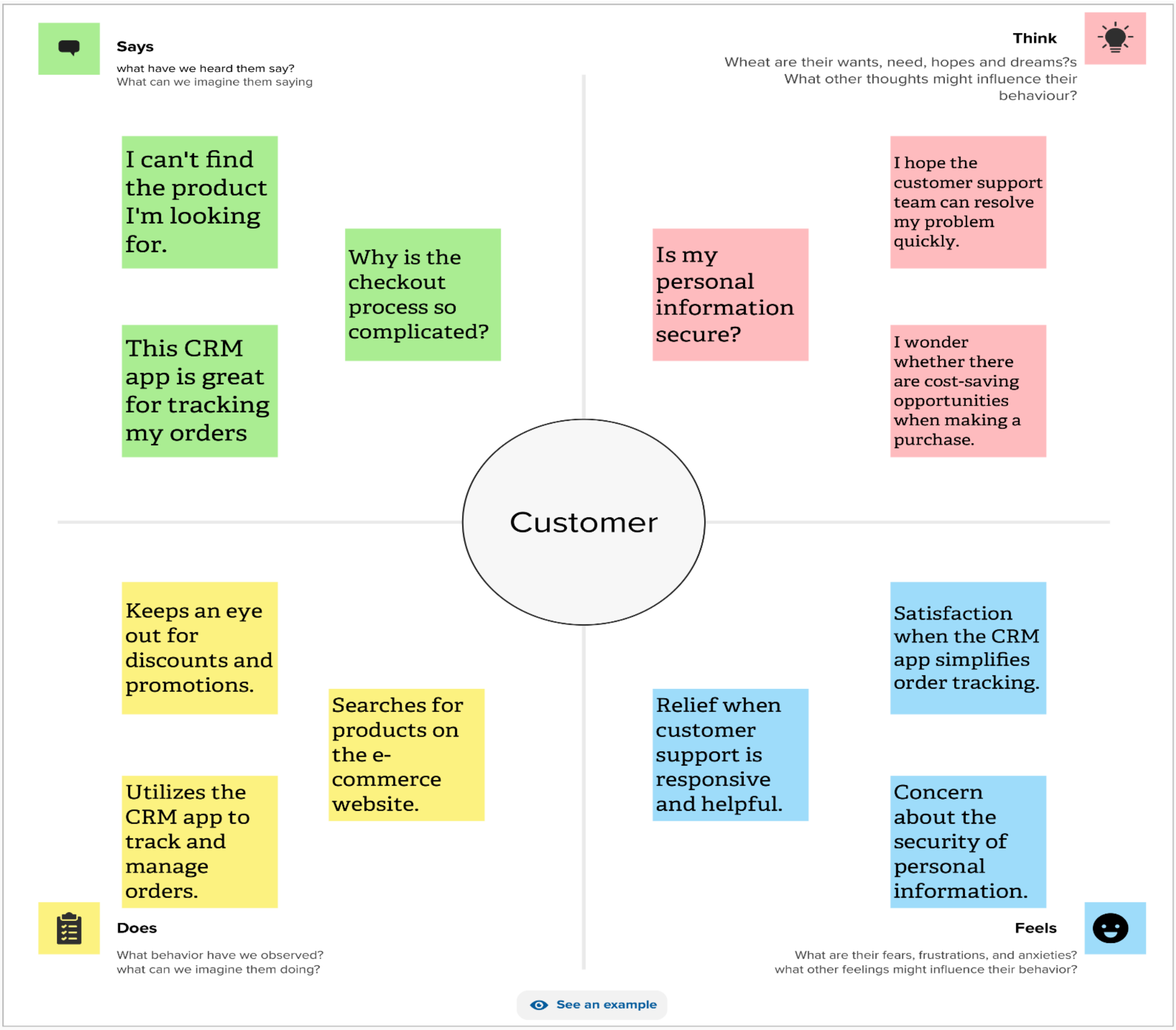


Problem Statement (PS)	**I am (E-Commerce business owner)**	**I'm trying to**	**But**	**Because**	**Which makes me feel**
PS	E-Commerce business owner	I am trying to manage my customer relationships, sales data to identify the potential customers and therefore used to retain the valuable customers.	However, I'm facing challenges in keeping track of customer interactions, order history, and preferences.	Because of this, I struggle to identify and capitalize on cross-selling and upselling opportunities, and I'm unable to deliver the best service to the customers.	Which makes me feel I'm missing out on potential sales, losing out on customer loyalty, and failing to deliver the best customer experience, which is impaction my business's growth and profitability

1.4 Empathy Map Canvas

An empathy map is a simple, easy-to-digest visual that captures knowledge about a user's behavior and attitudes.

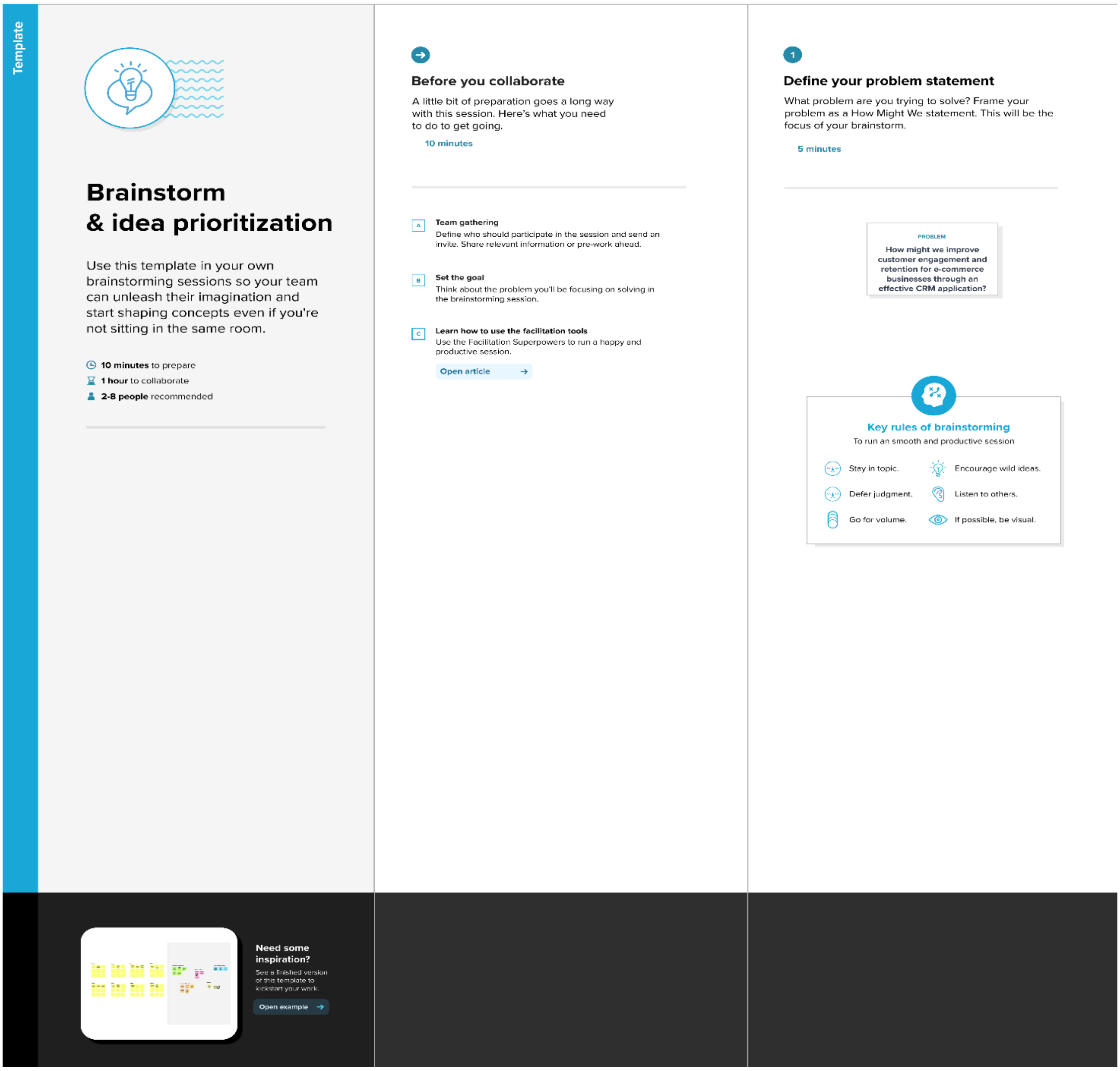
It is a useful tool to helps teams better understand their users. Creating an effective solution requires understanding the true problem and the person who is experiencing it. The exercise of creating the map helps participants consider things from the user's perspective along with his or her goals and challenges.



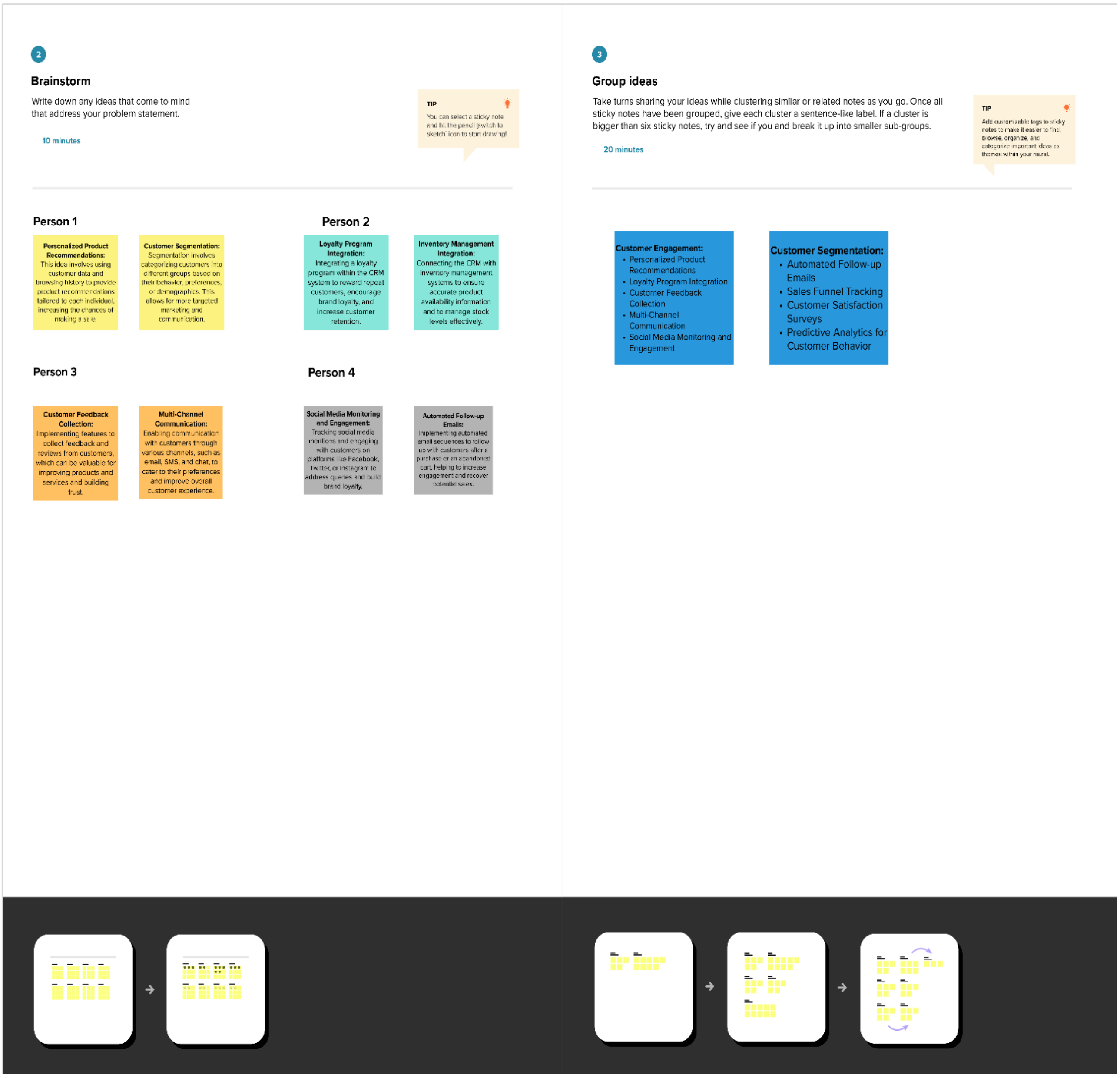
1.5 Ideation & Brainstorming

Brainstorming provides a free and open environment that encourages everyone within a team to participate in the creative thinking process that leads to problem solving, Prioritizing volume over value, out-of-the-box ideas are welcome and built upon, and all participants are encouraged to collaborate, helping each other develop a rich amount of creative solutions.

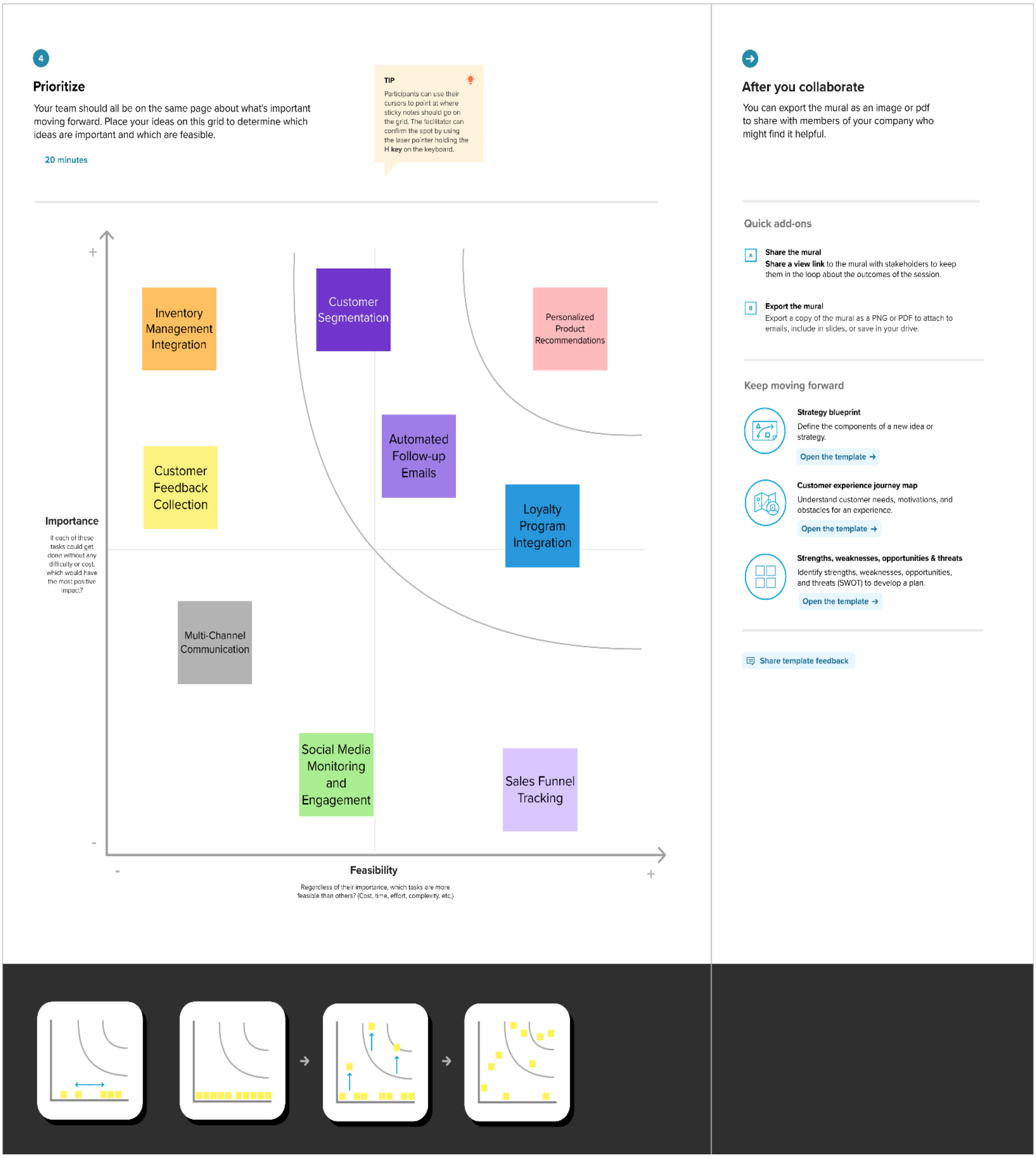
Step-1: Team Gathering, Collaboration and Select the Problem Statement:



Step-2: Brainstorm, Idea Listing and Grouping:



Step-3: Idea Prioritization:



1.6 Proposed Solution

S. No	Parameter	Description
1.	Problem Statement (Problem to be solved)	The problem to be solved with the implementation of a CRM (Customer Relationship Management) application in e-commerce activities is the inefficient management of customer relationships, data, and interactions. E-commerce businesses often struggle to centralize and effectively utilize customer information, including order history and preferences. This lack of a comprehensive CRM system hampers their ability to provide personalized marketing, targeted promotions, and efficient customer support. As a result, they miss out on potential sales, customer loyalty, and the ability to deliver a superior shopping experience, which can significantly impact their competitiveness and profitability in the e-commerce market.
2.	Idea / Solution description	Our proposed solution for the problem in e-commerce activities involves integrating a customized CRM application, such as Salesforce, into the existing infrastructure to centralize and manage customer data, allowing for personalized marketing, efficient customer support, and enhanced cross-selling and upselling opportunities, ultimately improving customer satisfaction, increasing sales, and bolstering the e-commerce business's competitive edge.

3.	Novelty / Uniqueness	The novelty and uniqueness of implementing a CRM application in e-commerce activities stem from its ability to transform and enhance customer relationship management in the online retail space. Unlike traditional CRM applications used in various industries, the uniqueness of this solution lies in its adaptability to the specific needs of e-commerce businesses. It centralizes complex customer data, including order history and preferences, and tailors it for personalized marketing and efficient customer support within the e-commerce context. This innovation provides a competitive edge by improving customer engagement, increasing sales, and elevating the e-commerce shopping experience, making it distinctive and valuable in the e-commerce industry.
4.	Social Impact / Customer Satisfaction	Our application will have a substantial social impact by centralizing and optimizing customer data management, this solution empowers e-commerce businesses to deliver a superior shopping experience. This, in turn, enhances customer satisfaction, fostering stronger brand loyalty and trust. Improved customer engagement and personalized marketing lead to more relevant product recommendations and promotions, ultimately increasing customer satisfaction. Additionally, efficient customer support and quicker issue resolution contribute to happier customers. Altogether, this solution not only benefits individual consumers but also positively impacts the e-commerce industry as a whole by promoting positive customer relationships and driving long-term customer retention, thereby strengthening the social reputation of e-commerce businesses.

1.7 Functional & Technical Requirements

1.7.1 Functional Requirements

FR No.	Functional Requirement (Epic)	Sub Requirement (Story / Sub-Task)
FR-1	Customer Data Management	**Data Capture:** The system should capture and store customer information, including contact details and purchase history. **Data Validation:** Ensure that customer data is accurate and complete by validating entries and correcting errors. **Data Privacy:** Comply with data privacy regulations to protect customer information.
FR-2	Sales Lead Tracking	**Lead Assignment:** Assign leads to sales representatives based on predefined criteria, such as geography or product interest. **Lead Progress Monitoring:** Track the progress of leads through the sales funnel, from initial contact to conversion. **Lead Scoring:** Assign scores to leads based on their likelihood to convert, enabling prioritization.
FR-3	Customer Communication	**Email Integration:** Allow for the sending and tracking of email communications directly within the CRM system. **Automated Messaging:** Implement automated messages for order confirmations, shipping updates, and customer feedback requests. **Personalized Messaging:** Enable the personalization of messages based on customer data and behavior.
FR-4	Order and Inventory Management	**Order Tracking**: Monitor and update order status in real-time, providing customers with accurate information. **Inventory Sync:** Synchronize inventory levels with the CRM to prevent over-selling and backorders. **Returns and Refunds Handling:** Manage the returns and refunds process efficiently and update customer records accordingly.

FR-5	Customer Support and Service	**Ticketing System:** Implement a customer support ticketing system to manage and prioritize customer inquiries. **Knowledge Base Integration:** Provide access to a knowledge base with FAQs and resources for self-service support. **Service Level Agreements (SLAs):** Define and track SLAs for response and resolution times for support requests.
FR-6	Reporting and Analytics	**Sales Performance Analytics:** Generate reports on sales performance, revenue, and customer acquisition. **Customer Segmentation:** Segment customers based on their behaviors and demographics to tailor marketing efforts. **Predictive Analytics:** Utilize predictive analytics to forecast customer behavior and trends for proactive decision-making.

1.7.2 Technical Requirements

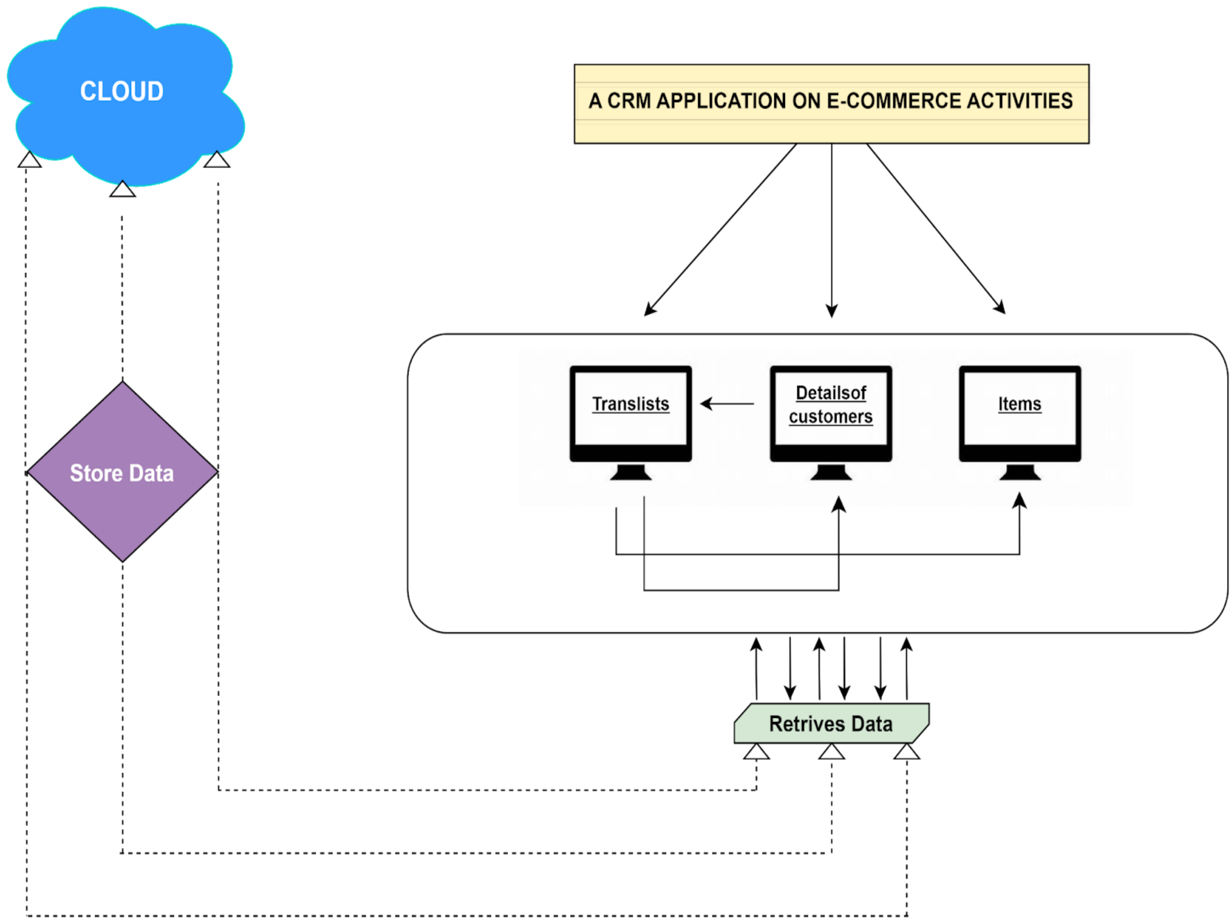
TR No.	Technical Requirement	Description
TR-1	Salesforce Environment	Utilize Salesforce's Enterprise or Unlimited edition to ensure scalability and access to advanced features.
TR-2	Development language	Develop using Salesforce's proprietary programming language, Apex, for server-side logic.
TR-3	Security and Compliance	The CRM system should implement robust security measures to protect sensitive customer data. This includes encryption, access control, and compliance with relevant data protection regulations, such as GDPR or CCPA, to ensure data privacy and legal compliance.
TR-4	Integration	The CRM application should offer a well-documented API and integration framework to allow developers to extend its functionality and connect it to other systems or services. This flexibility supports customization and the integration of third-party tools or plugins.
TR-5	Customization	Allow administrators to customize and configure the application, including approval workflows, fields, and user profiles.
TR-6	Mobile Accessibility	• Ensure that the application is accessible via the Salesforce mobile app for on-the-go request submission and tracking. • Develop a custom mobile app using Salesforce Mobile SDK for more tailored mobile functionality.

1.8 Project Road Map

1.8.1 Project Flow

Project Description:

CRM Application on E-Commerce Activities is about fetching and gathering of all the related data from the Commerce websites, outdoor retail shops and performing operations on that data .This operations are of type : Inserting a new data, updating the already existing data or deleting the data. Additional to these, we also need to do an effective CRM i.e via communicating through email with the potential customers identified.



1.8.2 Technical Archictecture

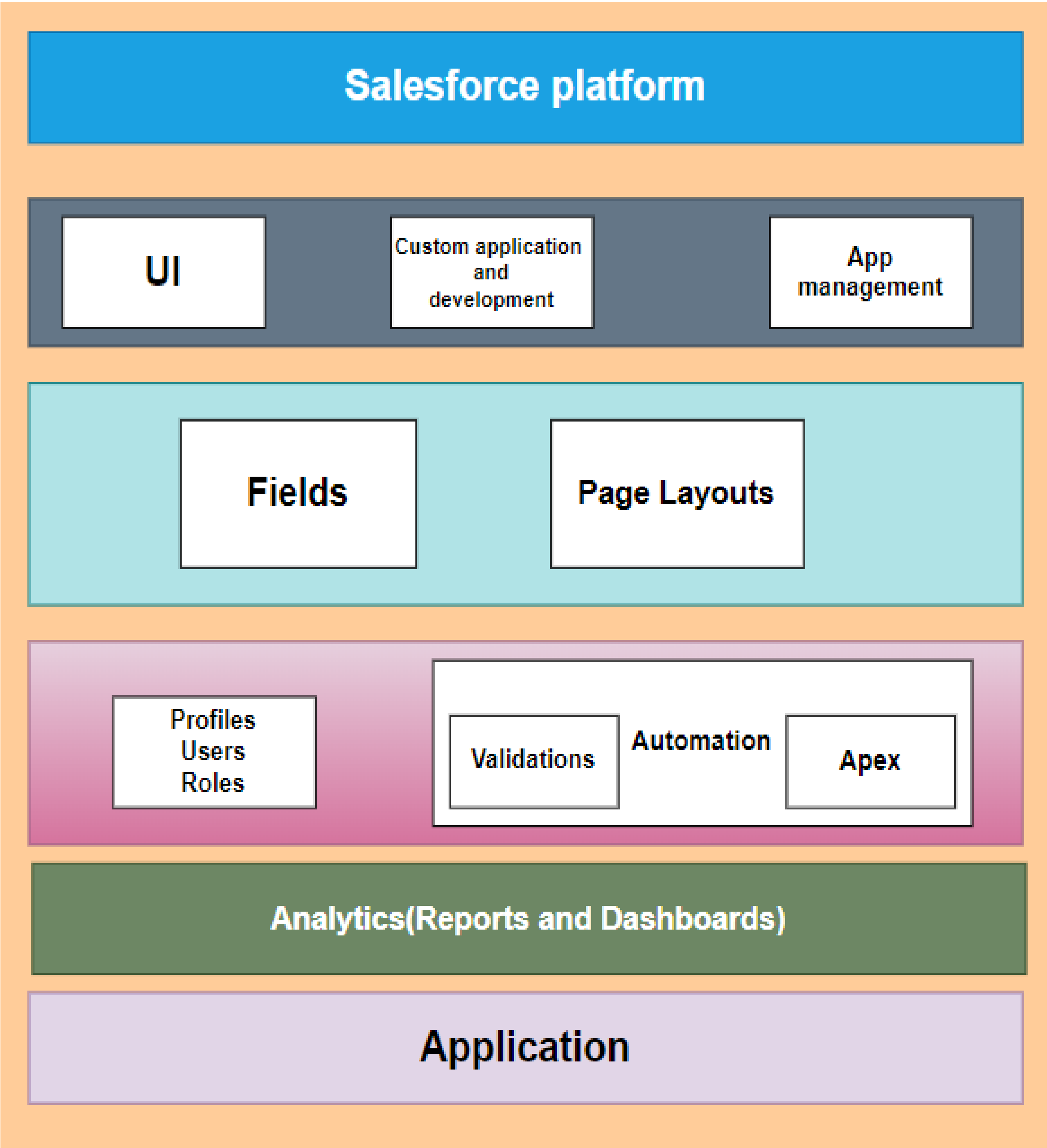


TABLE-1: Component and Technologies:

S.No	Component	Description	Technology
1.	User Interface	**Lightning Components**: Use Salesforce Lightning components to design the user interface for employees, managers, and administrators. **Custom Pages:** Create custom Visualforce pages for more tailored and complex UI elements	Salesforce
2.	Data Model	**Custom Objects:** Define custom objects in Salesforce to represent entities like travel requests, expenses, and approvals. **Master-Detail and Lookup Relationships:** Establish relationships between objects to maintain data integrity. **Custom Fields:** Create custom fields tocapture specific information, such as travel dates, expenses, and approval status.	Salesforce
3.	Customer Data Storage and Retrieval	Salesforce provides a robust API and query language (SOQL) for accessing and retrieving customer data within the platform.	Salesforce API and SOQL
4.	Reporting and Analytics	Salesforce offers built-in reporting and analytics capabilities. You can create custom reports and dashboards to track e-commerce activities and generate insights.	Salesforce Reporting and Analytics tools

5.	Security	**Role-Based Access Control (RBAC):** Configure RBAC to control who can access and modify data. **Data Encryption:** Encrypt sensitive data both in transit and at rest. Salesforce comes with robust security features, including user authentication, role-based access control, and data encryption, to ensure the security of customer data.	Salesforce
6.	Salesforce Development	**Apex:** Use Salesforce's proprietary programming language, Apex, for server-side logic and data manipulation. **Visualforce:** Develop custom user interfaces with Visualforce pages and components. **Lightning Web Components:** Create modern, component-based UIs using Lightning Web Components for a more responsive and dynamic user experience	Salesforce

Table-2: Application Characteristics:

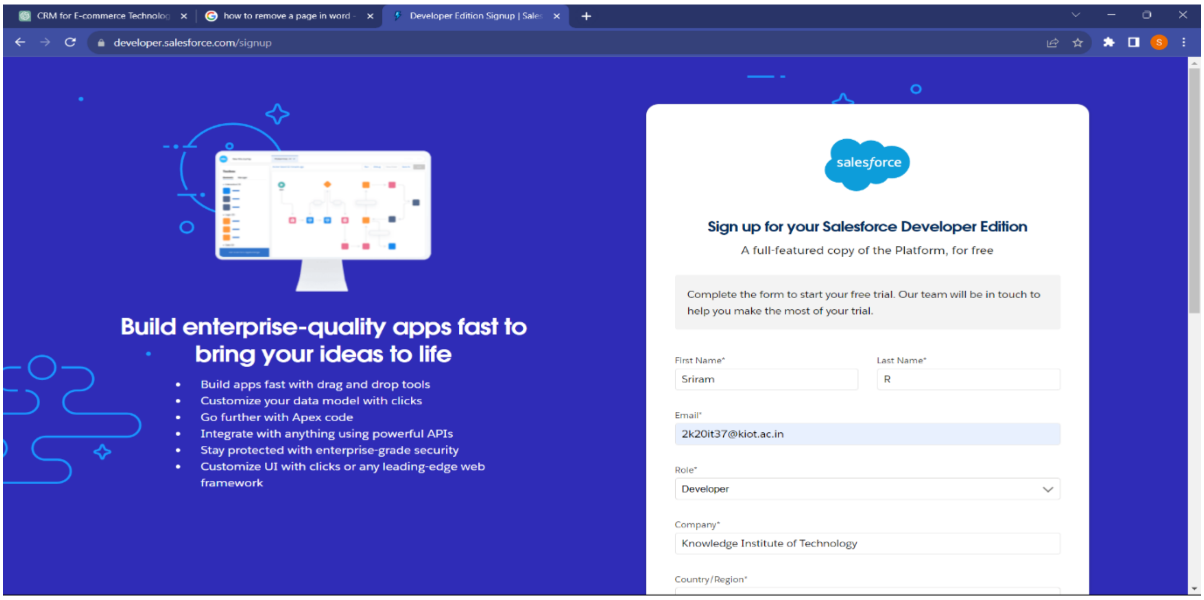
S. No	Characteristics	Description	Technology
1.	Customer Data Centralization	The CRM application should centralize all customer-related data, including contact information, purchase history, preferences, and interactions. This centralized data repository ensures that all employees have access to a complete and up-to-date customer profile.	salesforce
2.	Integration Capabilities	The CRM should seamlessly integrate with other e-commerce systems and tools, such as the e-commerce platform, email marketing software, payment gateways, and inventory management systems. Integration ensures a consistent and holistic view of customer data and streamlines operations.	salesforce
3.	User-friendly	The application should have an intuitive and user-friendly interface to make it easy for customers, managers, and administrators to navigate and use the system without extensive training.	Salesforce
4.	Scalability	The application should be able to scale with the growing number of users and data, accommodating increasing demands without significant performance degradation.	salesforce
5.	Performance	Ensure the application's performance meets or exceeds user expectations, with rapid response times for actions such as submitting requests or generating reports.	salesforce
6.	Reporting and Analytics	Robust analytics and reporting capabilities are vital for understanding customer behavior, tracking e-commerce performance, and making data-driven decisions. The CRM should provide dashboards and reports to monitor KPIs and generate insights.	salesforce

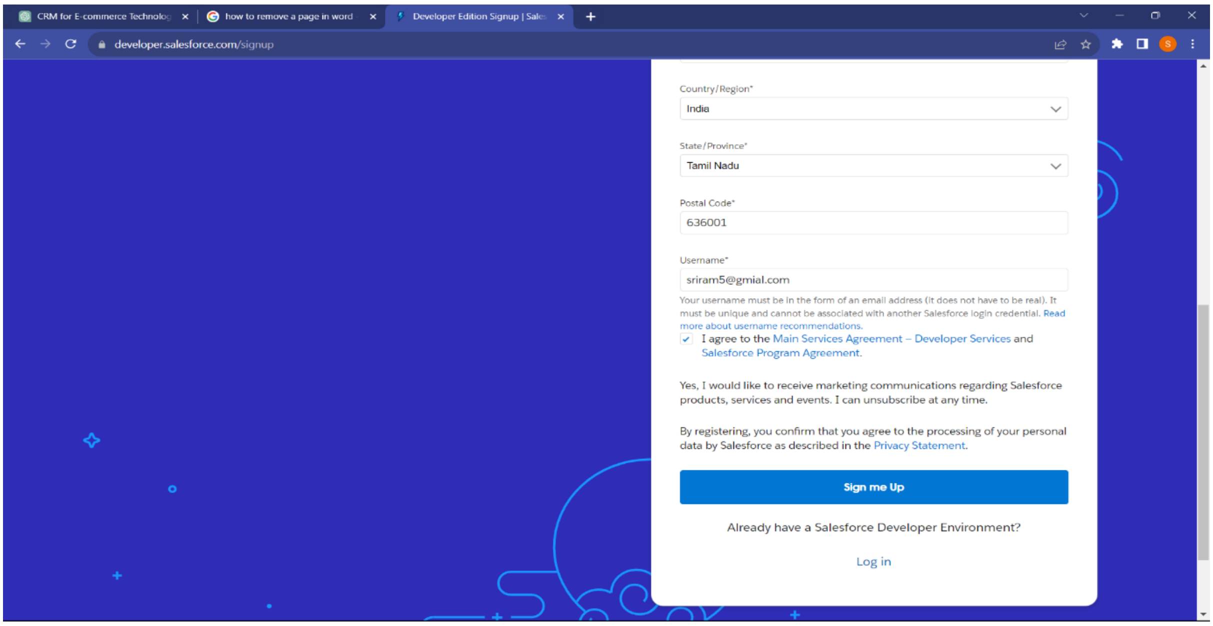
CHAPTER-2

PREPARATION DATA MODELING

2.1 Salesforce Developer Org

In Salesforce, a Developer Sign Up or Developer Edition is a special type of Salesforce environment that is primarily used for development, testing, and learning purposes.





2.2 Custom Object Creation & Tabs

Custom Object Creation

Create translists Object:

1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.

1) Enter the label name>> Translist

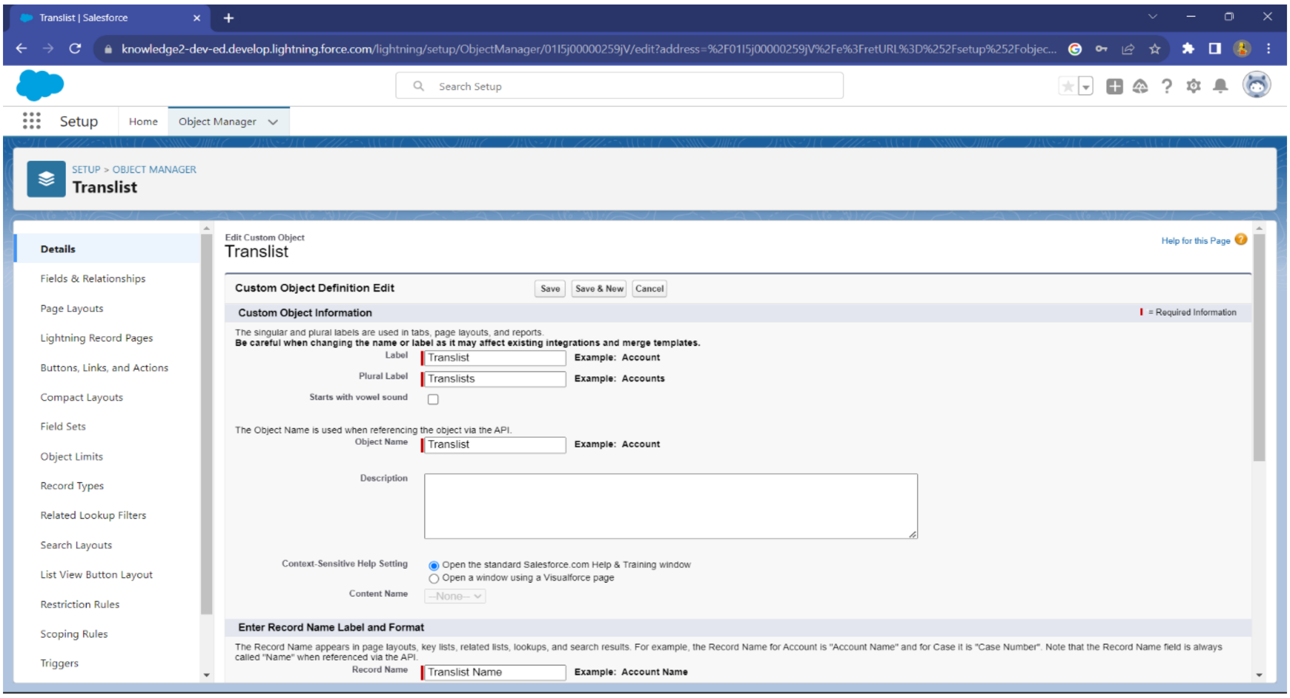
2) Plural label name>> Translists

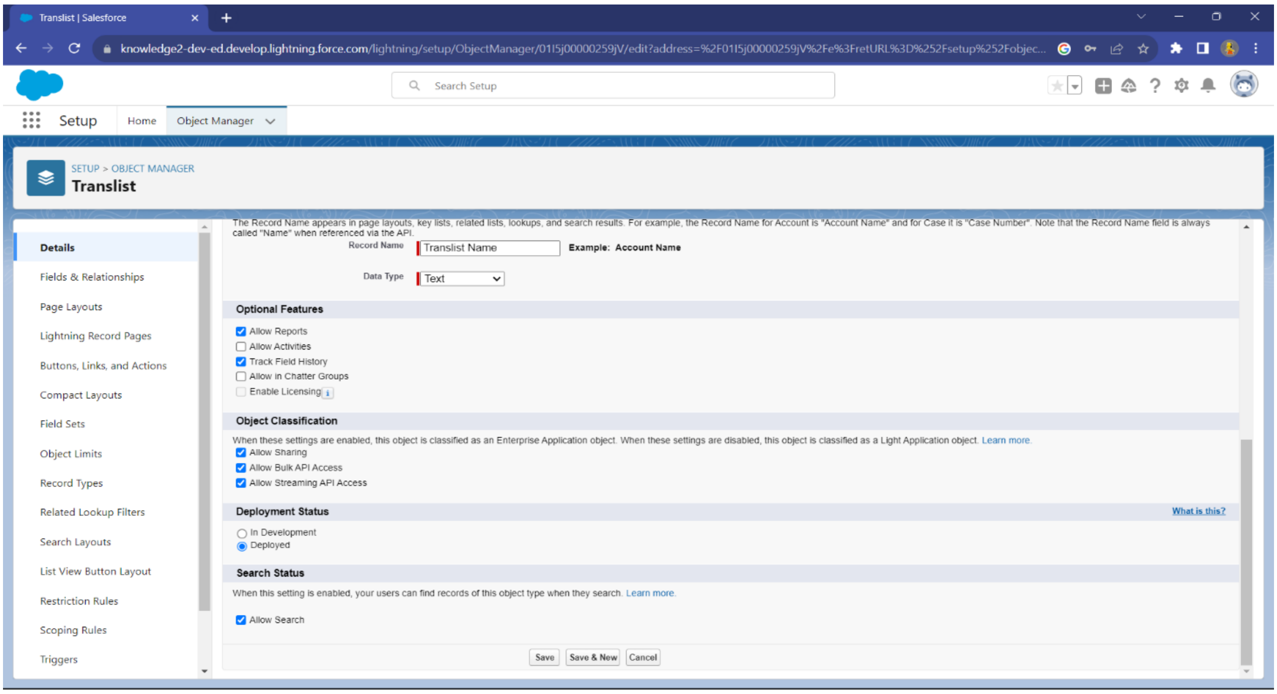
3) Enter Record Name Label and Format

   >> Record Name >> Translists Name

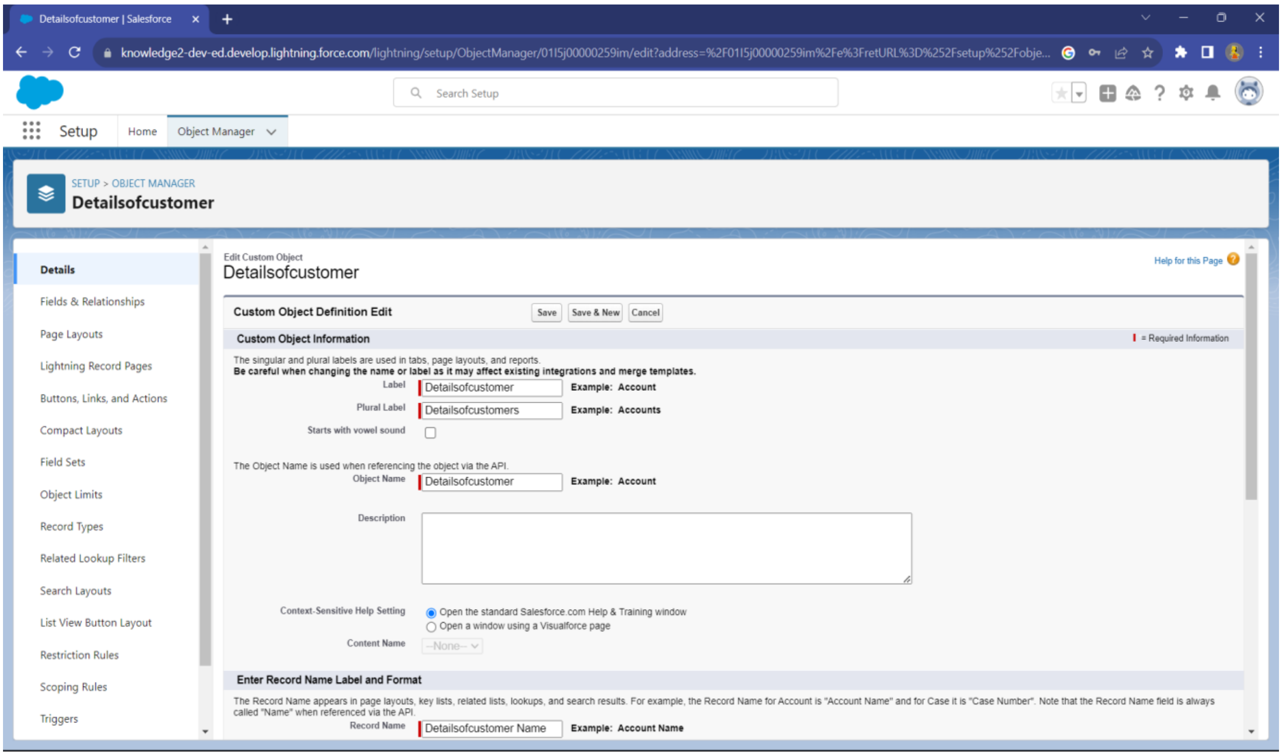
   >> Data Type >> Name

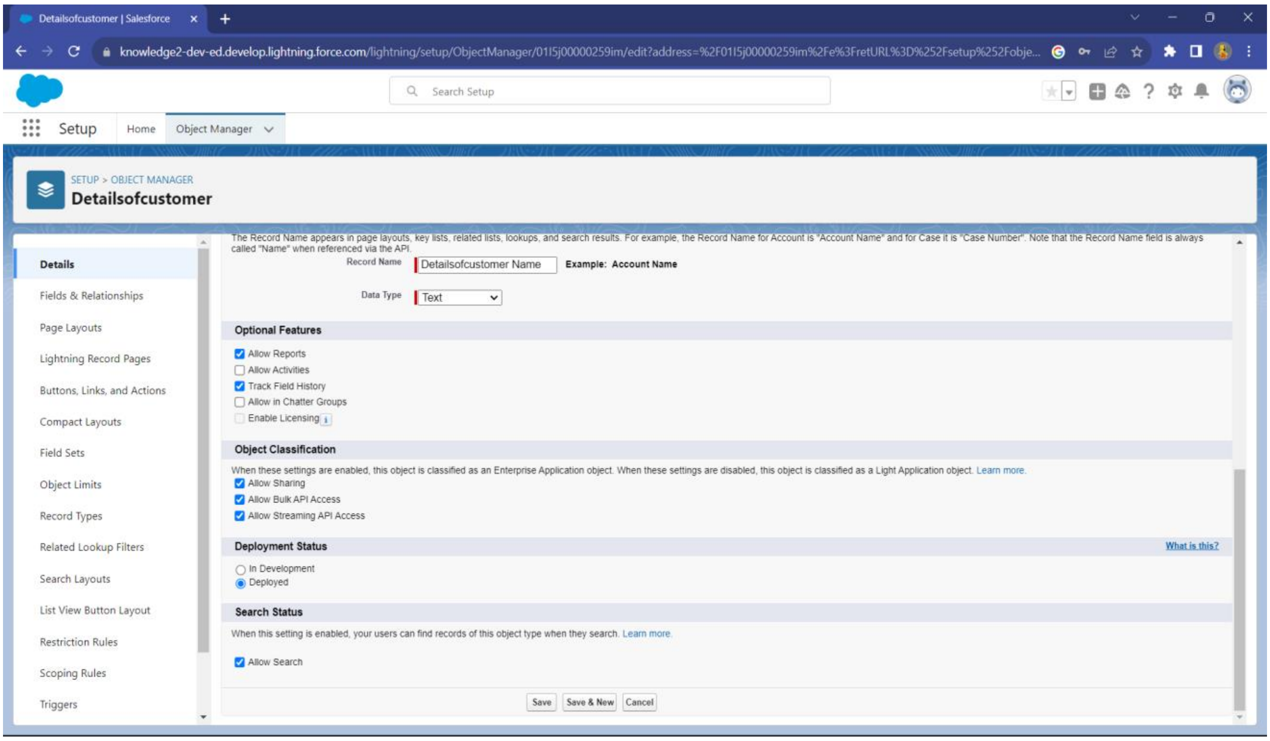
2. Click on Allow reports and Track Field History,
3. Allow Search ? **Save**.

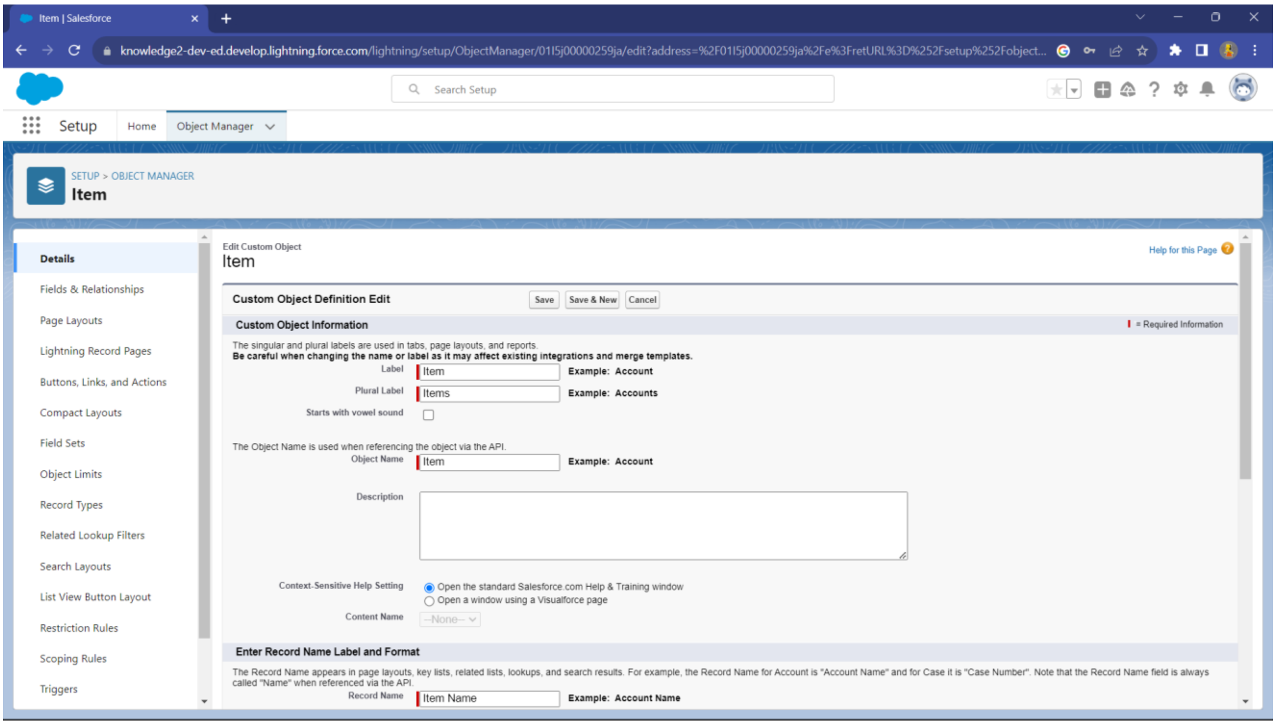




Similarly, create objects for Details of customer and Item:



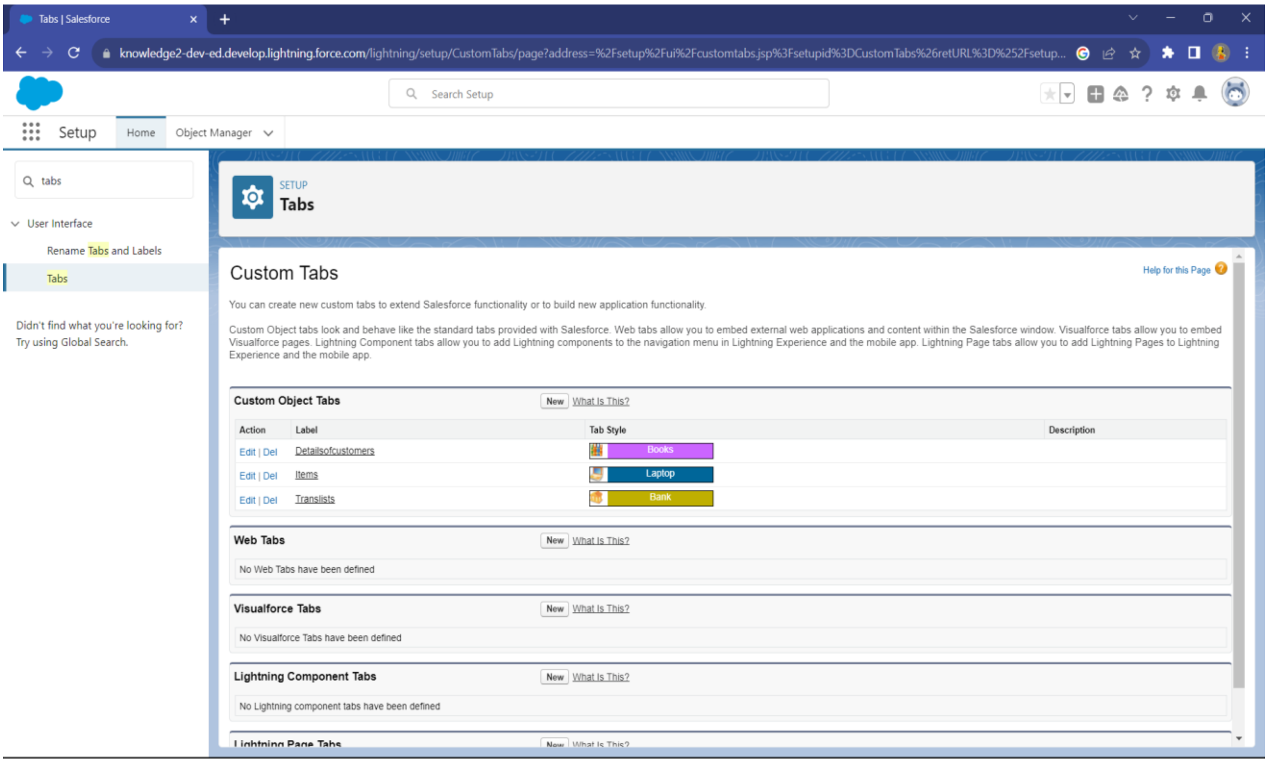




Tabs

Salesforce Tabs are like the menu options in a software application. They allow you to access specific functions, objects, or data.

1. Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab).
2. Select Object >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) uncheck the include tab >> **Save**.
3. Make sure that append tab to users' existing personal customizations is checked.

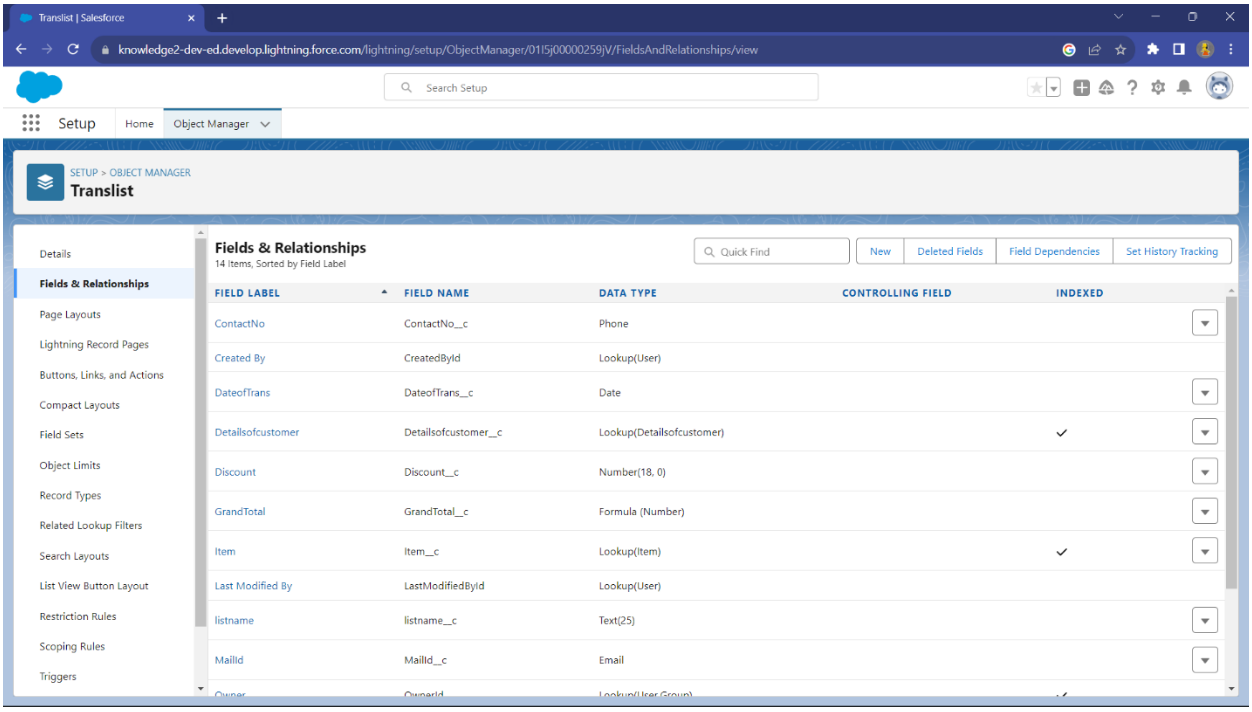


2.3 Fields

Steps to Create a Field in an Object:

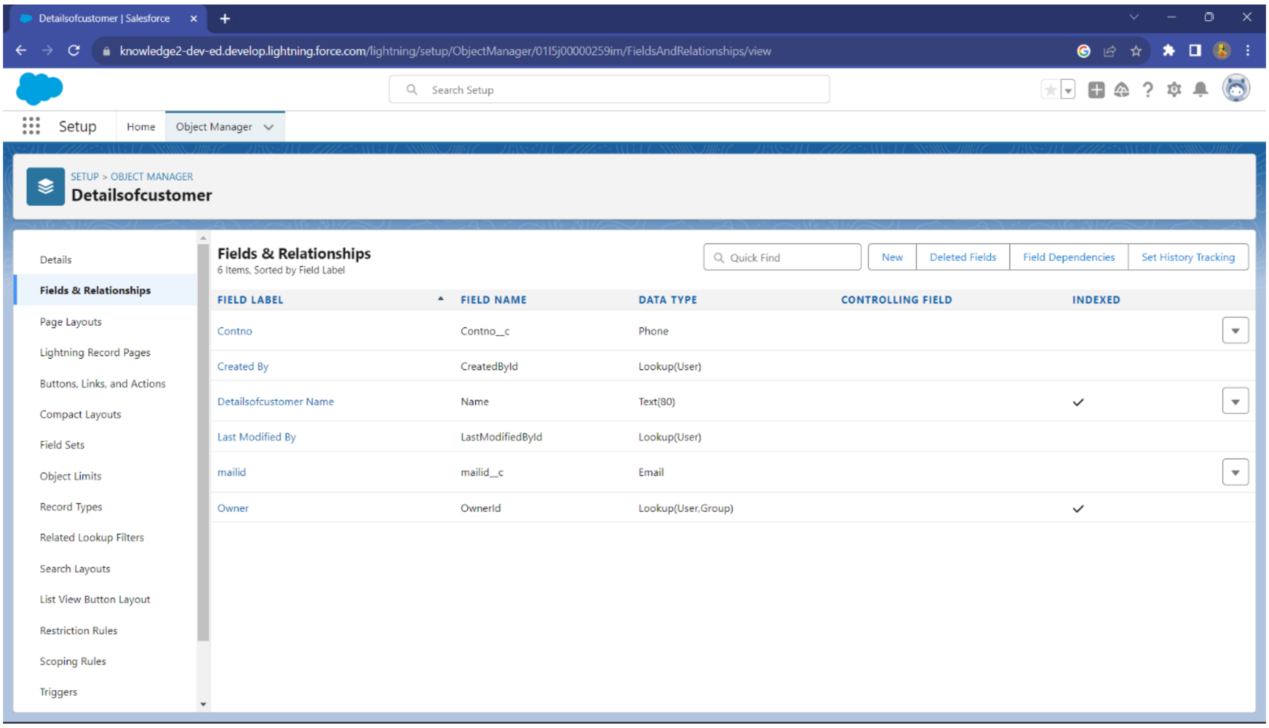
1. While still on your salesforce account, navigate to the gear icon present in the top right corner. You will notice Setup and click on setup.
2. You will now be navigated to the setup page, and click on object manager and search for object "translists".
3. Click on "Fields & Relationships" in the left panel.
4. Click on New and choose the data type that is required by the field you need.
5. Click next and fill the following details in the mentioned.
6. Click Next, Next and click on "**Save and New**".

Fields in Translists Object

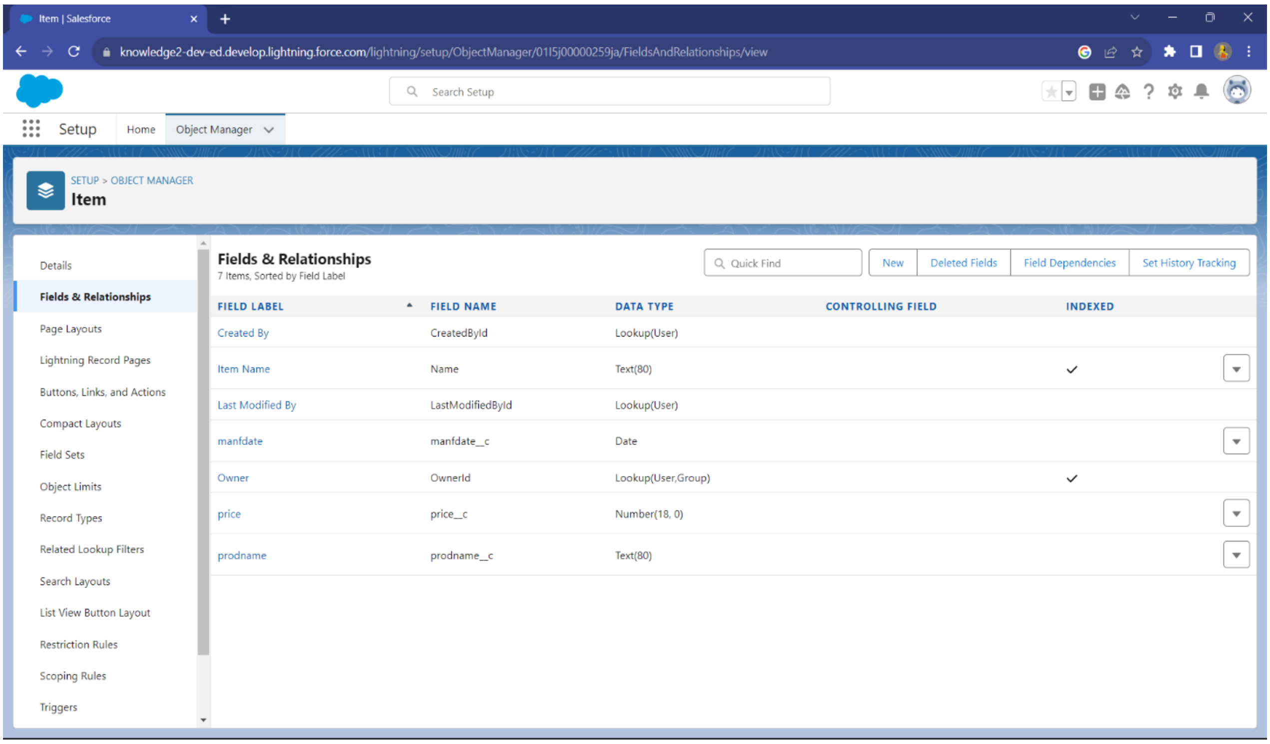


Formula Fields

Fields in Details Of Customer Object



Fields in Item Object



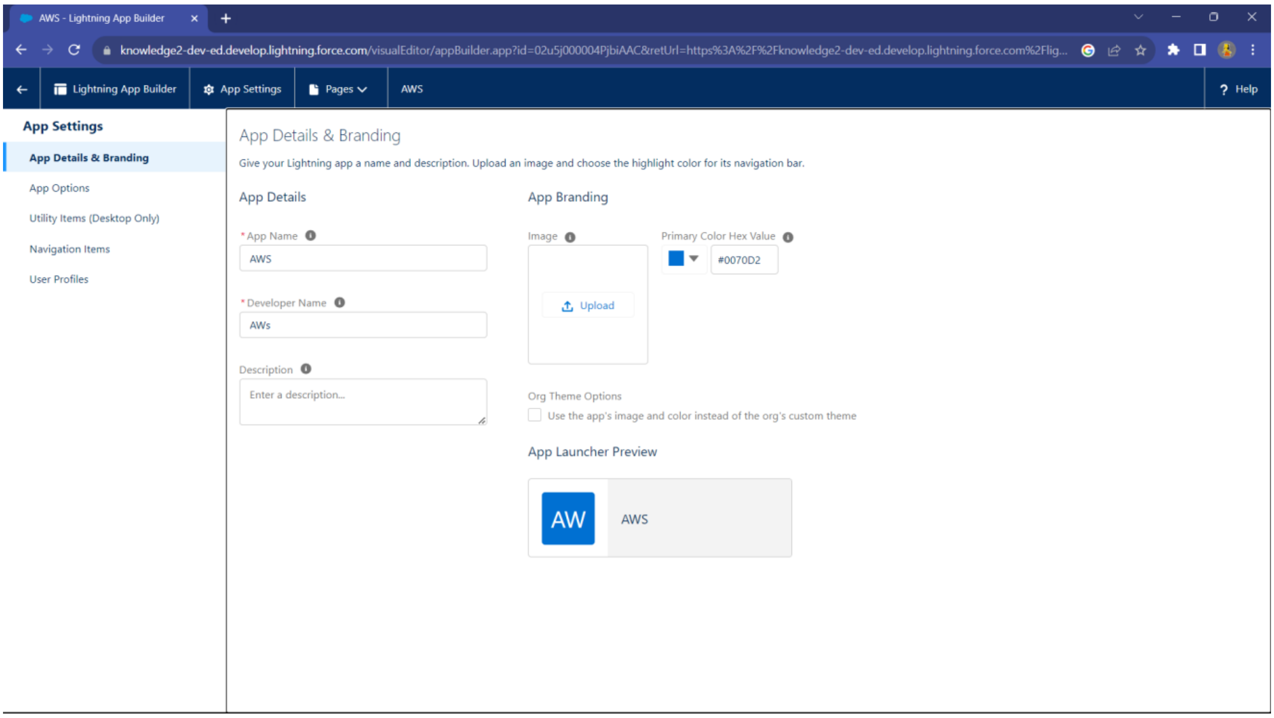
2.4 Lightning App

The Lightning App Builder is a point-and-click tool that makes it easy to create custom pages for the Salesforce mobile app and Lightning Experience, giving your users what they need all in one place.

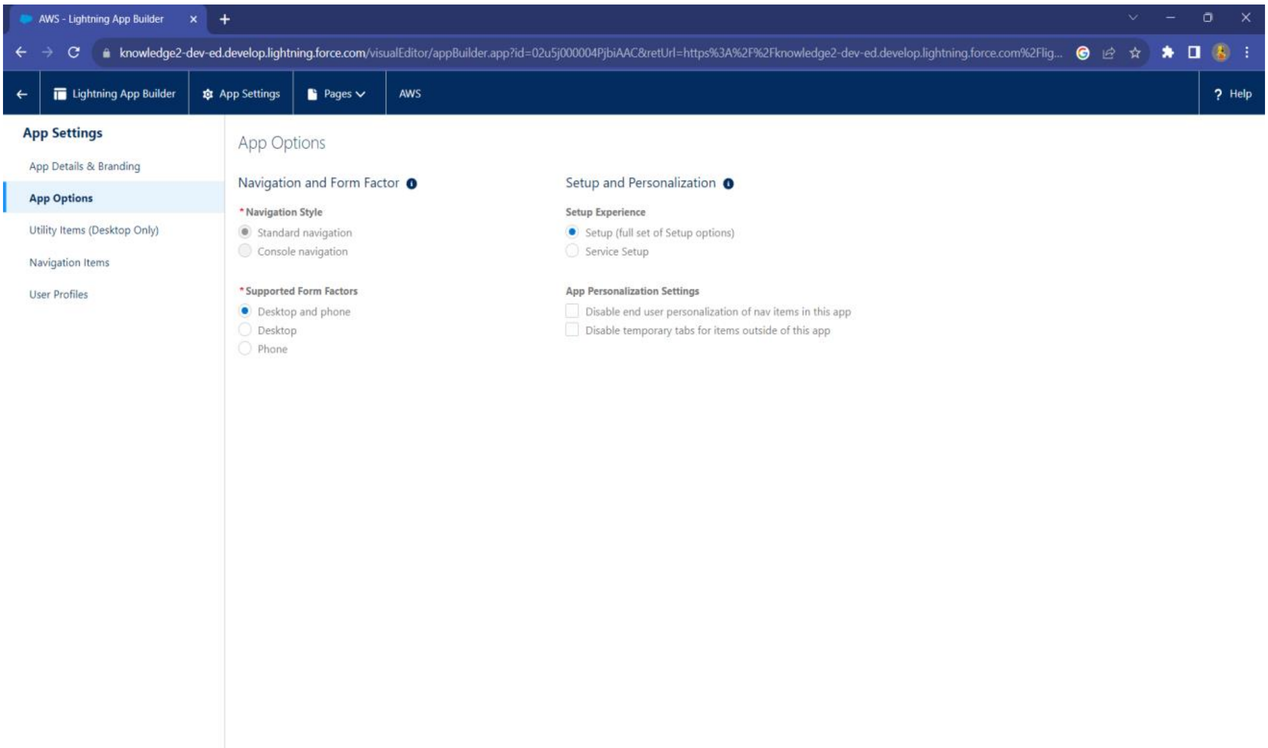
Create a Lightning App

- Build a Lightning app, add tabs, and customize page layouts.
- Create custom objects and fields for the app.
- Define relationships between objects.
- Import data and test the app.

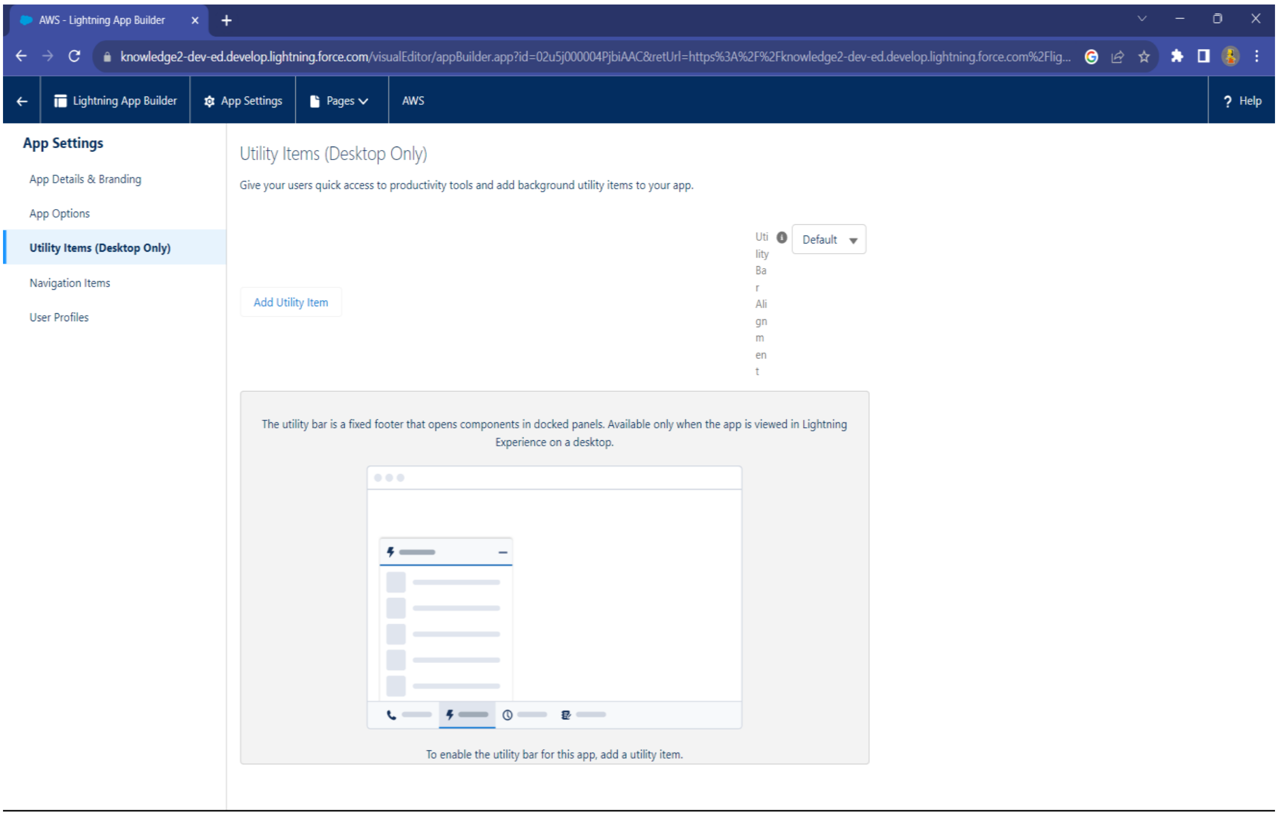
App Details & Branding:



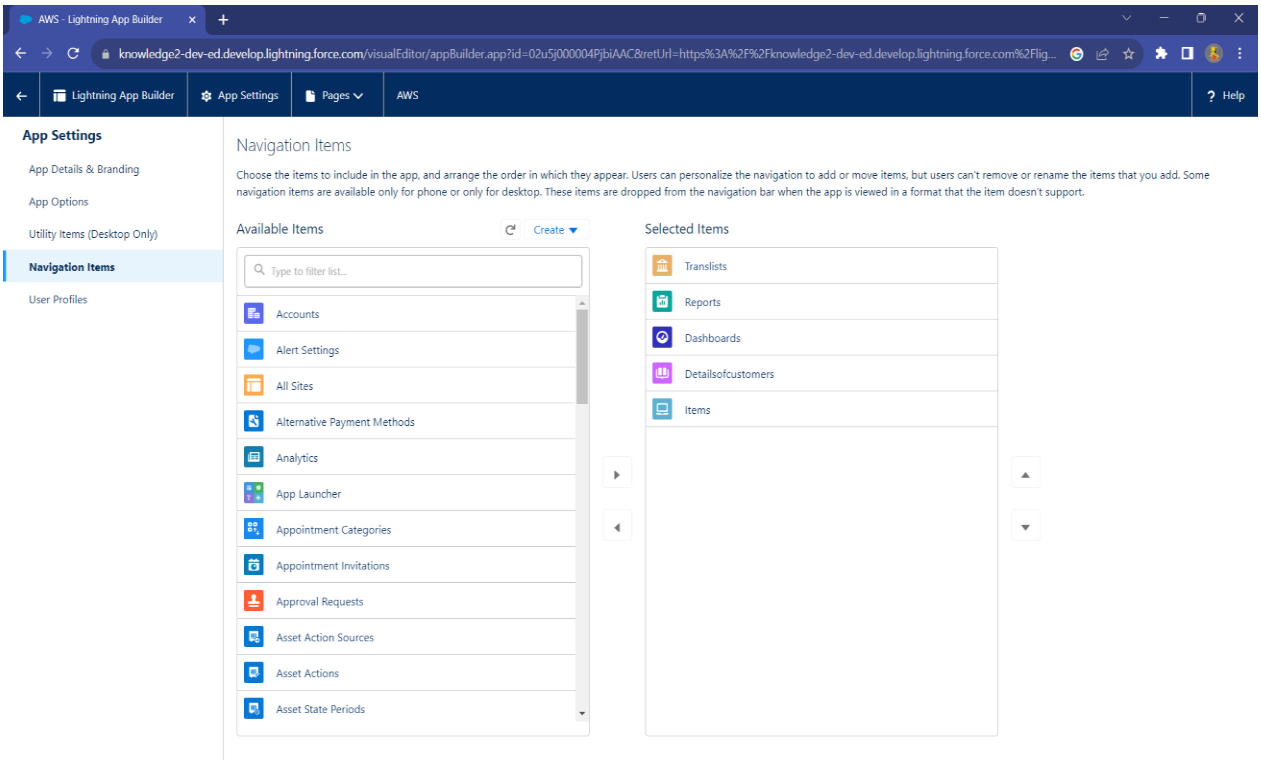
Add Options:



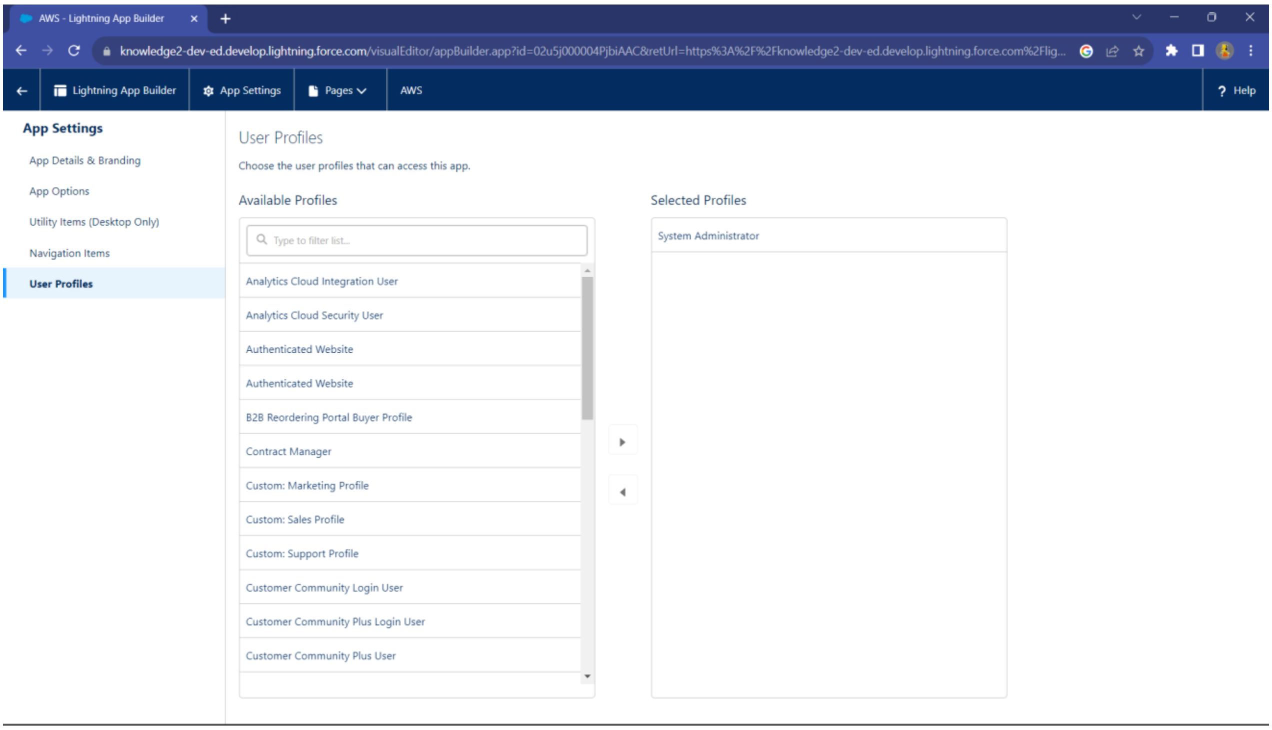
Utility Items:



Navigation Items:



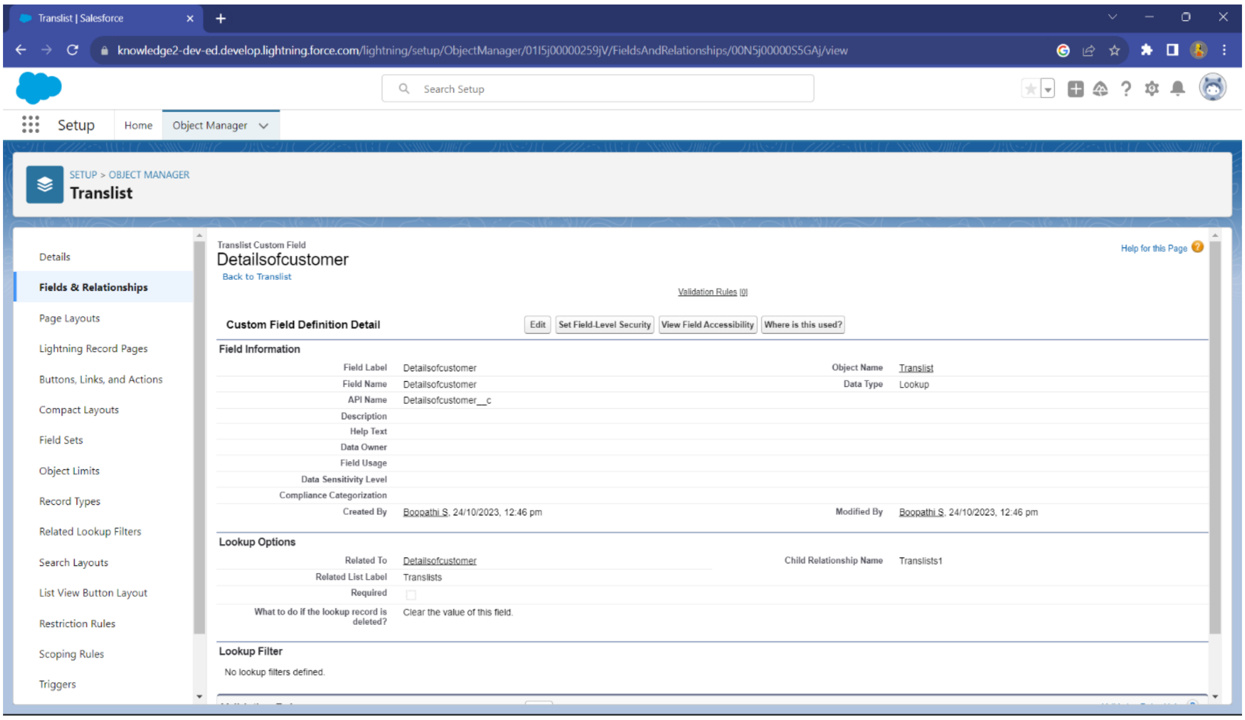
User Profile:

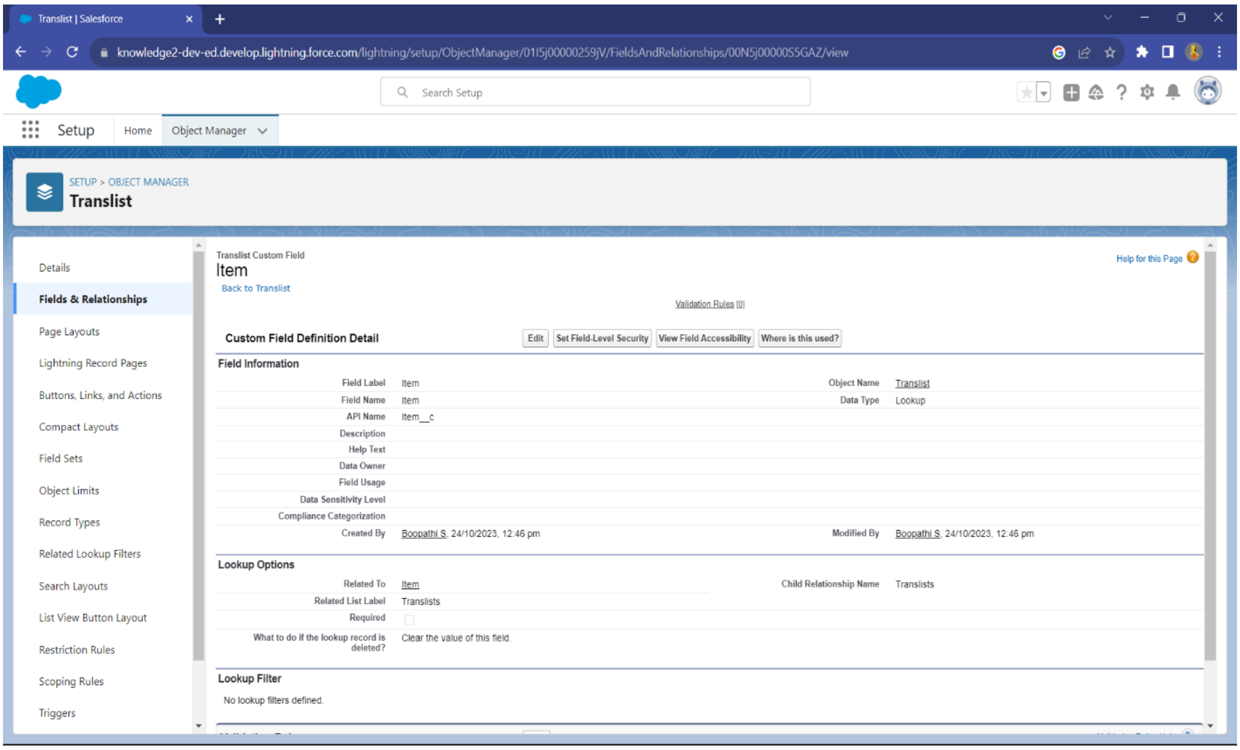


2.5 Relationship between Objects

Look up Relationship

Lookup Relationship in Salesforce relates two objects together but does not affect deletion (cascade delete functionality) or security.



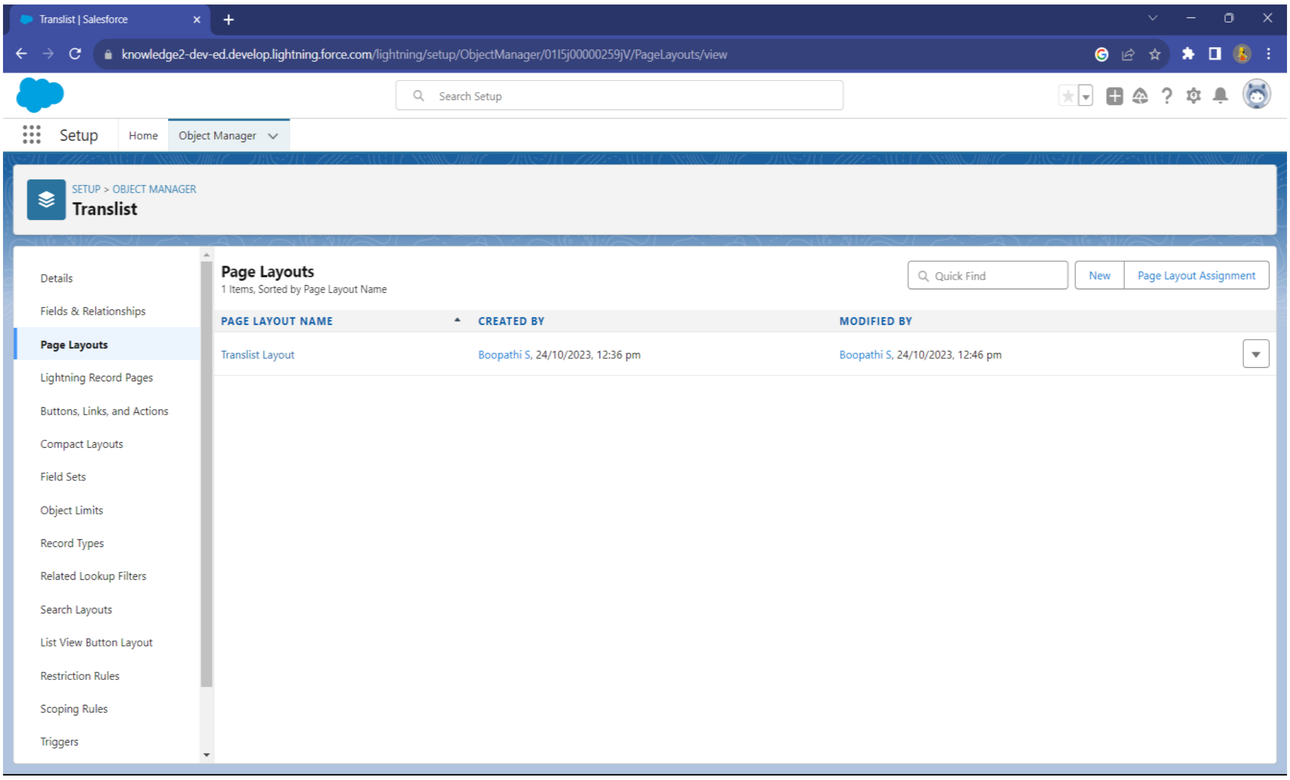


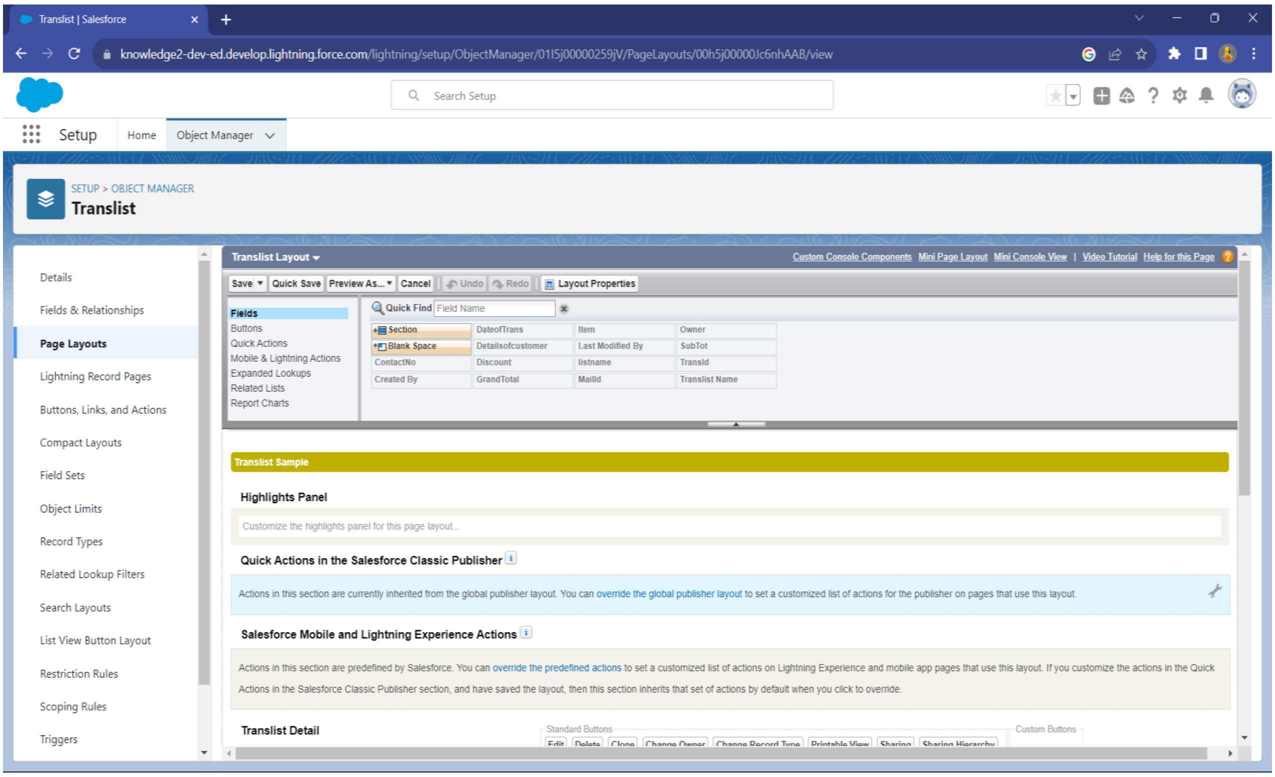
2.6 Customize User Interface

Customize your app's page layouts, compact layouts, and actions.

Page Layout

A page layout determines the fields, sections, related lists, and buttons that appear when users view or edit a record. You can modify an object’s default page layout or create a custom page layout.




Translist | Salesforce
knowledge2-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5j00000259jV/PageLayouts/00h5j00000Jc6nhAAB/view
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Translist
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
Restriction Rules
Scoping Rules
Triggers
Translist Layout
Save
Quick Save
Preview As...
Cancel
Undo
Redo
Layout Properties
Fields
Buttons
Quick Actions
Mobile & Lightning Actions
Expanded Lookups
Related Lists
Report Charts
Quick Find
Section
Blank Space
ContactNo
Created By
DateofTrans
Detailsofcustomer
Discount
GrandTotal
Item
Last Modified By
listname
MailId
Owner
SubTot
TransId
Translist Name
Translist Sample
Highlights Panel
Customize the highlights panel for this page layout...
Quick Actions in the Salesforce Classic Publisher
Actions in this section are currently inherited from the global publisher layout. You can override the global publisher layout to set a customized list of actions for the publisher on pages that use this layout.
Salesforce Mobile and Lightning Experience Actions
Actions in this section are predefined by Salesforce. You can override the predefined actions to set a customized list of actions on Lightning Experience and mobile app pages that use this layout. If you customize the actions in the Quick Actions in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.
Translist Detail
Standard Buttons
Custom Buttons

CHAPTER-3

USERS & DATA SECURITY

3.1 User Adaption

Create A Record For Items Object:

Go to the App Launcher present in the top left corner in the trailhead page.

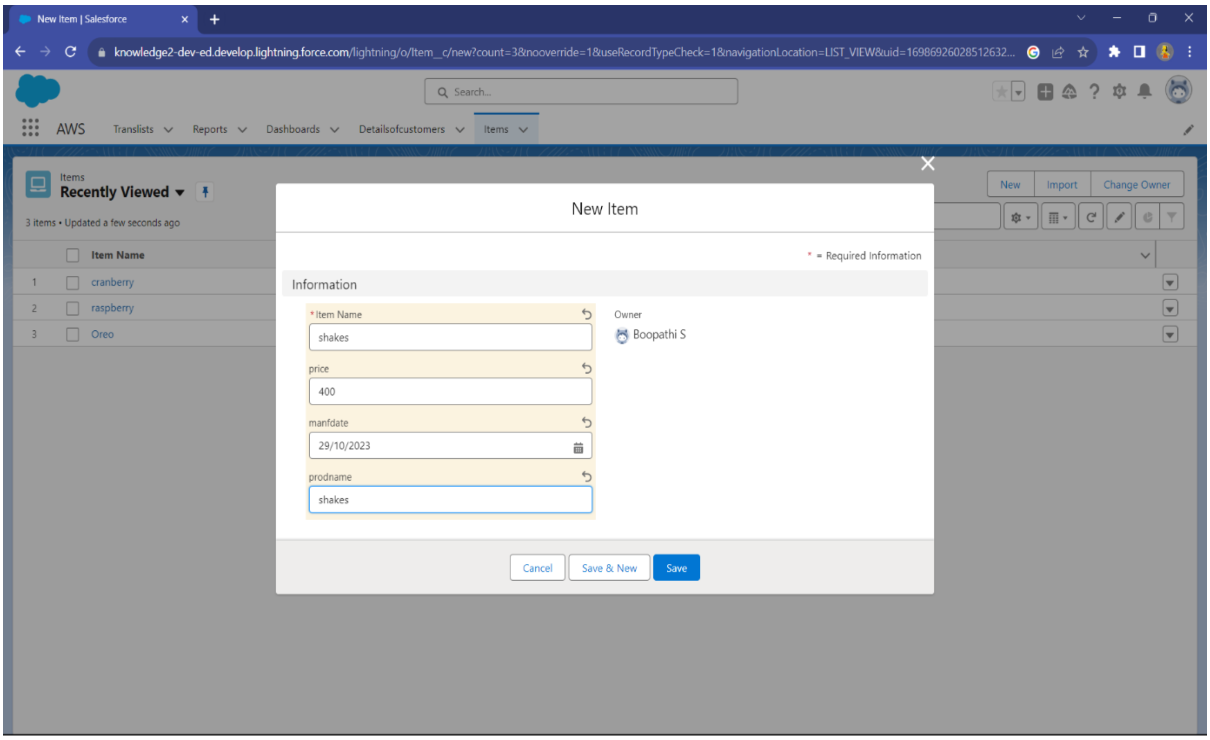
1. We will find many apps present in the app launcher, visit any app present in the app launcher.
2. You will find the products tab present in the app page, click on the tab.
3. Then click on NEW to insert a new record into the products object.
4. Create a Item Record – Prodname : Oreo

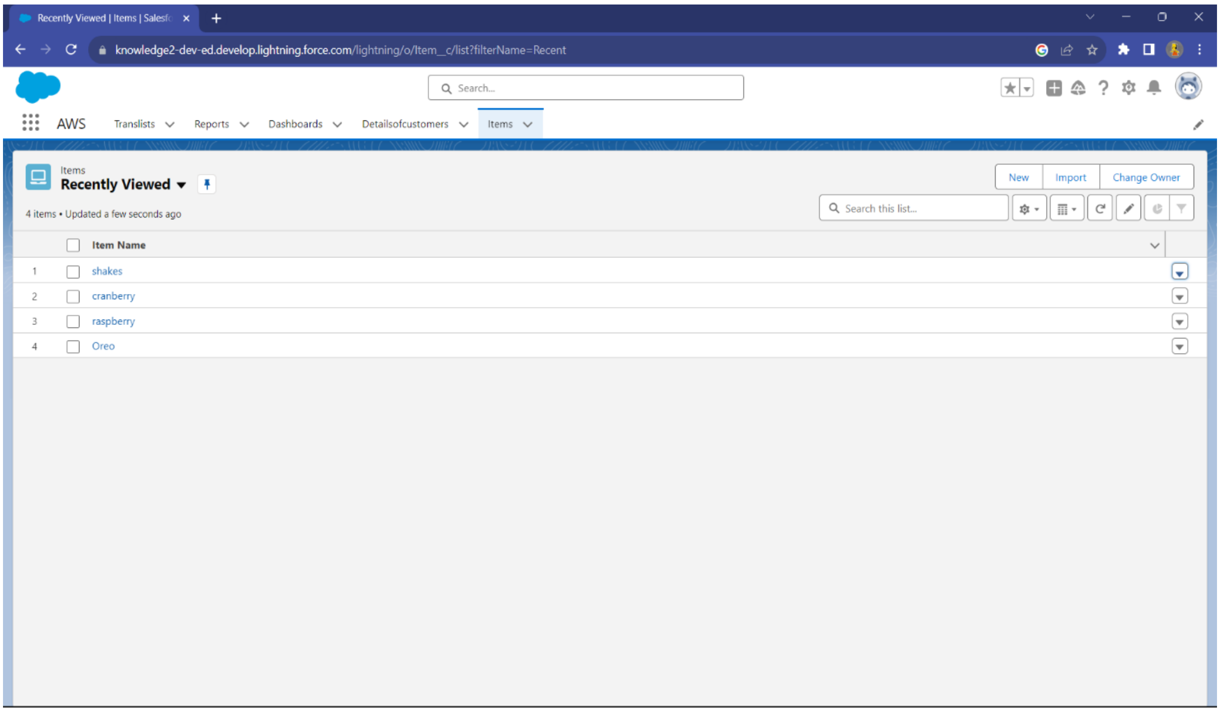
   Price : 100
5. Create a Item Record - prodname : raspberry

   Price : 200
6. Create a Item Record – prodname : cranberry

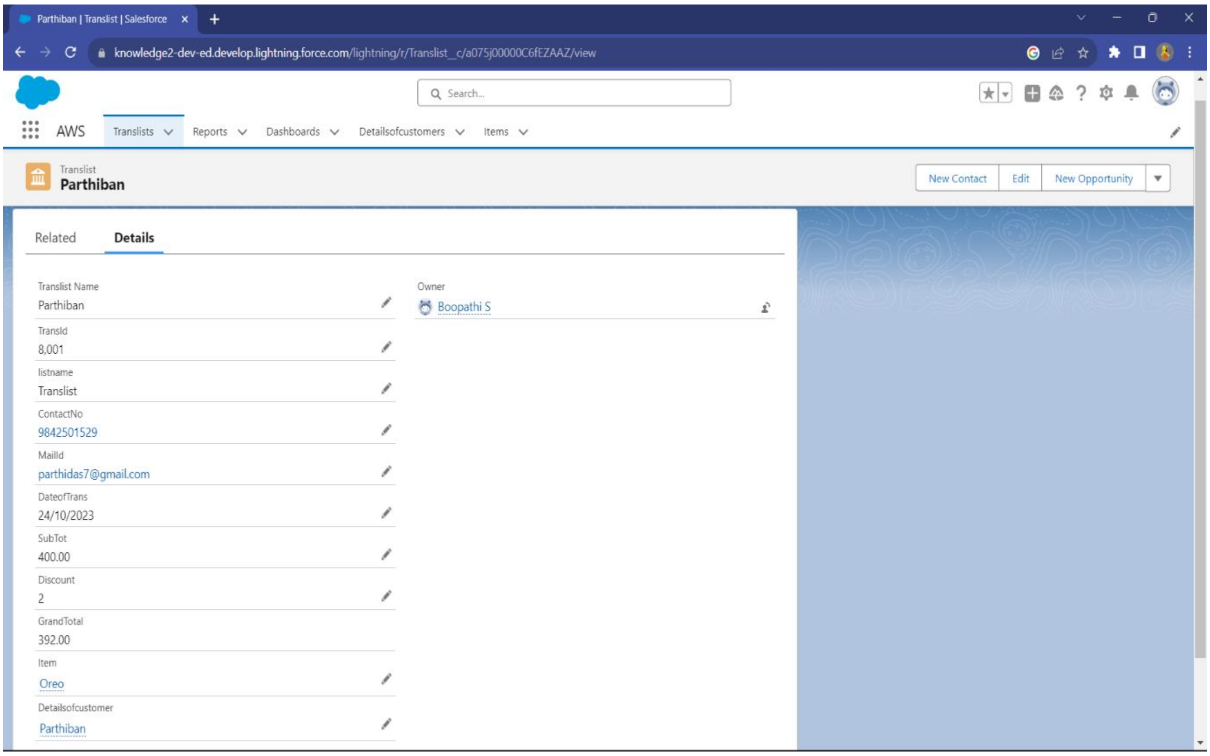
   Price : 300
7. Create a Item Record - prodname : shakes

   Price : 400





Create A Record For Translists Object:



CHAPTER-4
AUTOMATION

4.1 Apex

Apex is a strongly typed, object-oriented programming language that allows developers to execute flow and transaction control statements on the Lightning platform server in conjunction with calls to the Lightning Platform? API. Using syntax that looks like Java and acts like database stored procedures, Apex enables developers to add business logic to most system events, including button clicks, related record updates, and Visualforce pages. Apex code can be initiated by Web service requests and from triggers on objects.

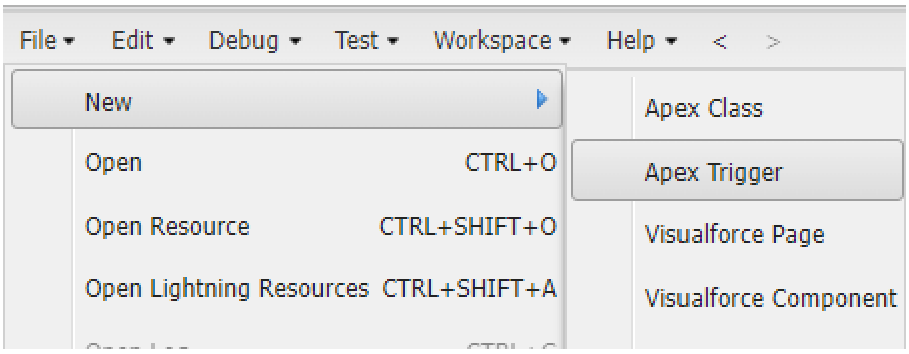
It is as similar as java i.e, it also supports OOP (Object oriented programming) like Classes, objects, methods.

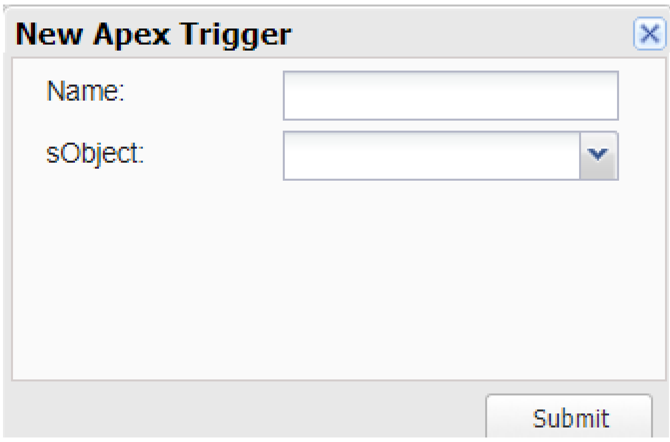
4.2 Identifying Potential Customers

Triggers:

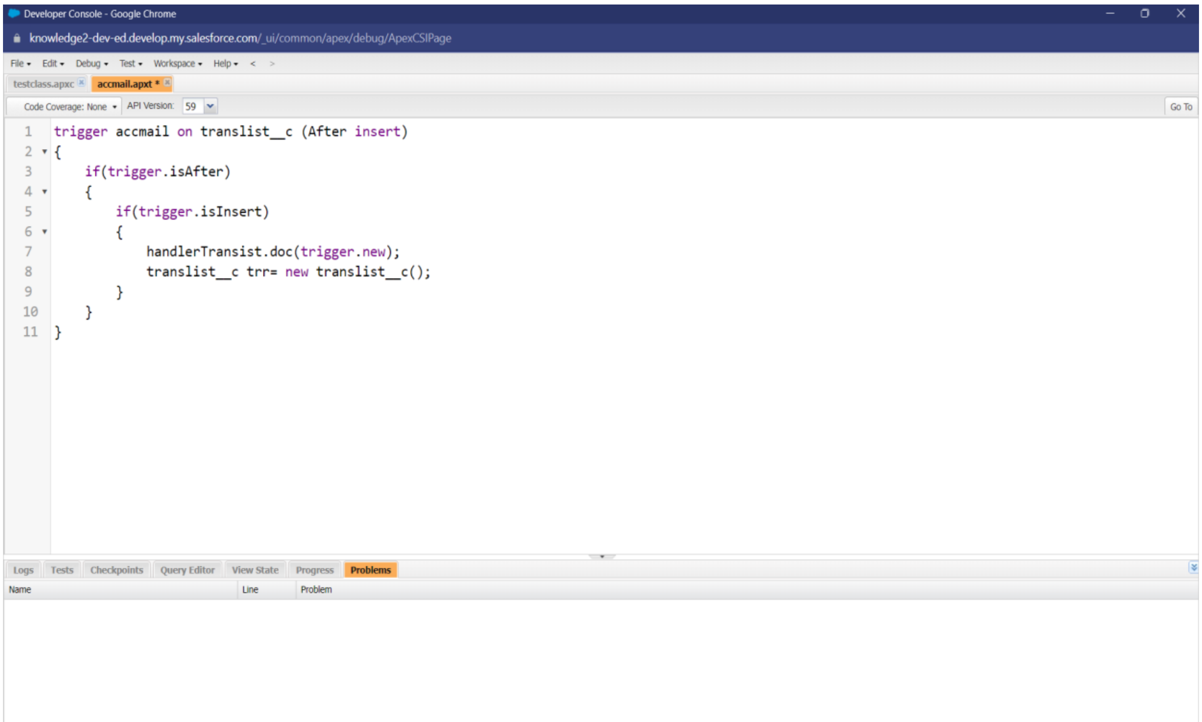
How to create a new trigger:

1. While still in the trailhead account, navigate to the gear icon in the top right corner.
2. Click on developer console and you will be navigated to a new console window.
3. Click on File menu in the tool bar, and click on new>>Trigger.
4. Enter the trigger name and the object to be triggered.

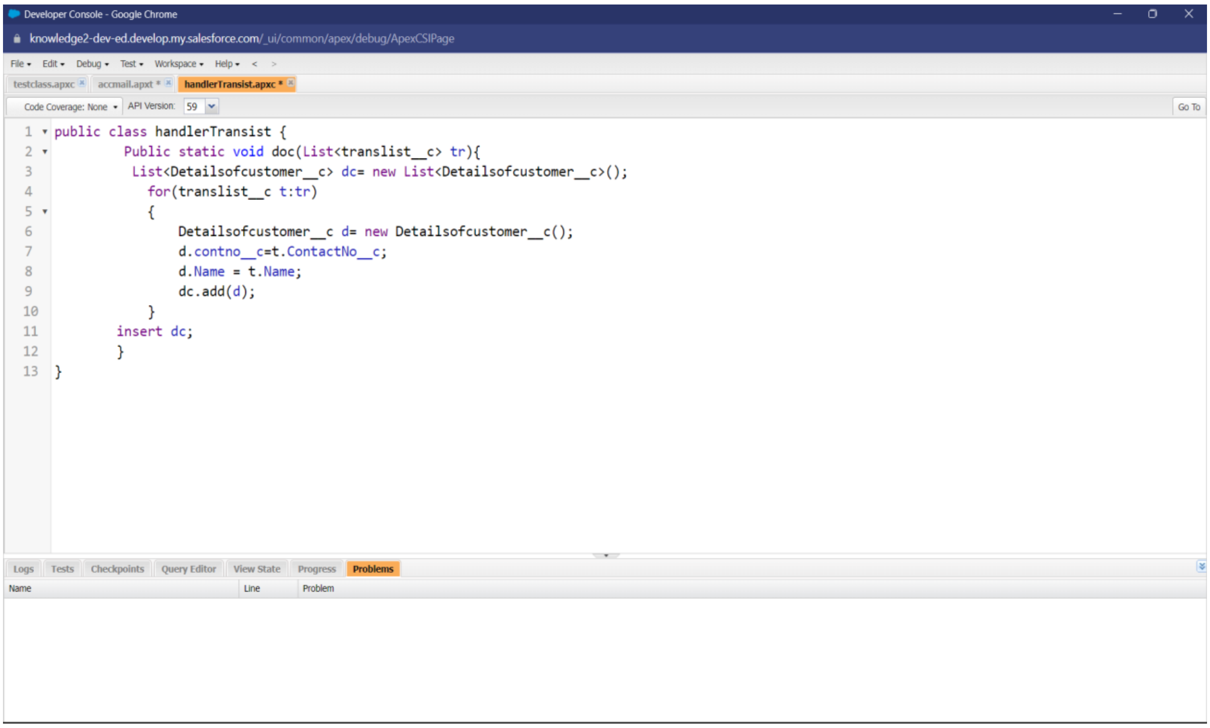




Trigger code:



Handler Class:



4.3 Apex Schedulers

The Apex Scheduler lets you delay execution so that you can run Apex classes at a specified time. This is ideal for daily or weekly maintenance tasks using Batch Apex. To take advantage of the scheduler, write an Apex class that implements the Schedulable interface, and then schedule it for execution on a specific schedule.

Schedulable Apex Syntax:

To invoke Apex classes to run at specific times, first implement the Schedulable interface for the class. Then, schedule an instance of the class to run at a specific time using the System.schedule() method. After you implement a class with the Schedulable interface, use the System.schedule() method to execute it. The System.schedule() method uses the user's timezone for the basis of all schedules, but runs in system mode—all classes are executed, whether or not the user has permission to execute the class.

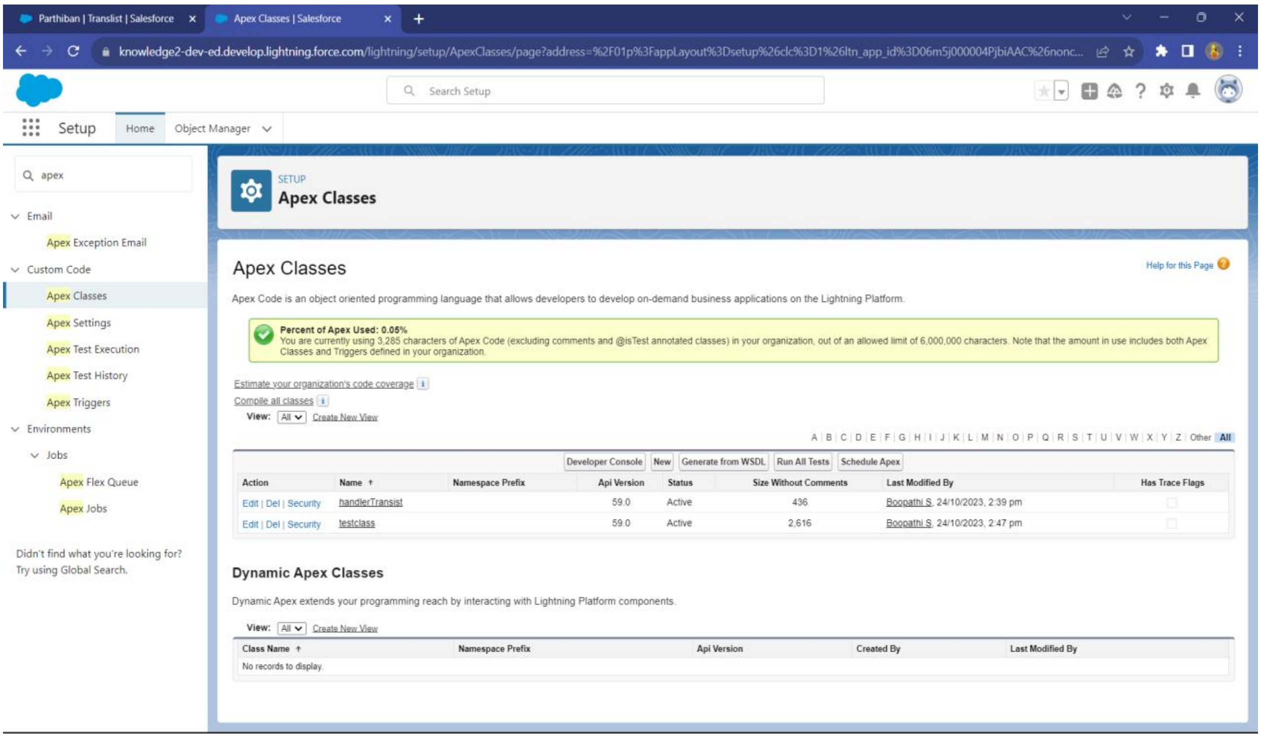
```
public class SomeClass implements Schedulable {
  public void execute(SchedulableContext ctx) {
        // awesome code here
  }
}
```

```
public class testclass implements Schedulable {
        public void execute(SchedulableContext ctx)
      {
        List<translist__c> d = [select transid__c from translist__c order by transid__c desc];
        List<translist__c> t = [select transid__c,item__c,name,mailid__c from translist__c order by transid__c desc];
        Set<translist__c> s = new set<translist__c>(d);
        list<translist__c> ls= new List<translist__c>();
        list<translist__c> p = [ select item__c from translist__c];
        list<translist__c> tc = new list<translist__c>();
        for (translist__c c : s)
        {
             for (translist__c ts : t)
             {
                    if (c.transid__c == ts.transid__c && !ls.contains(ts))
                    {
                        ls.add(ts);
                        integer c1=0;
                        string s1=ts.item__c;
                        for(translist__c tr:t)
                        {
                            if(tr.item__c!=s1 )
                            {
                                tc.add(tr);
                            }
                        }
                    Id relatedRecordId = tc[0].item__c;
                    string id1 = tc[0].item__c;
                    string id2 = tc[1].item__c;
```

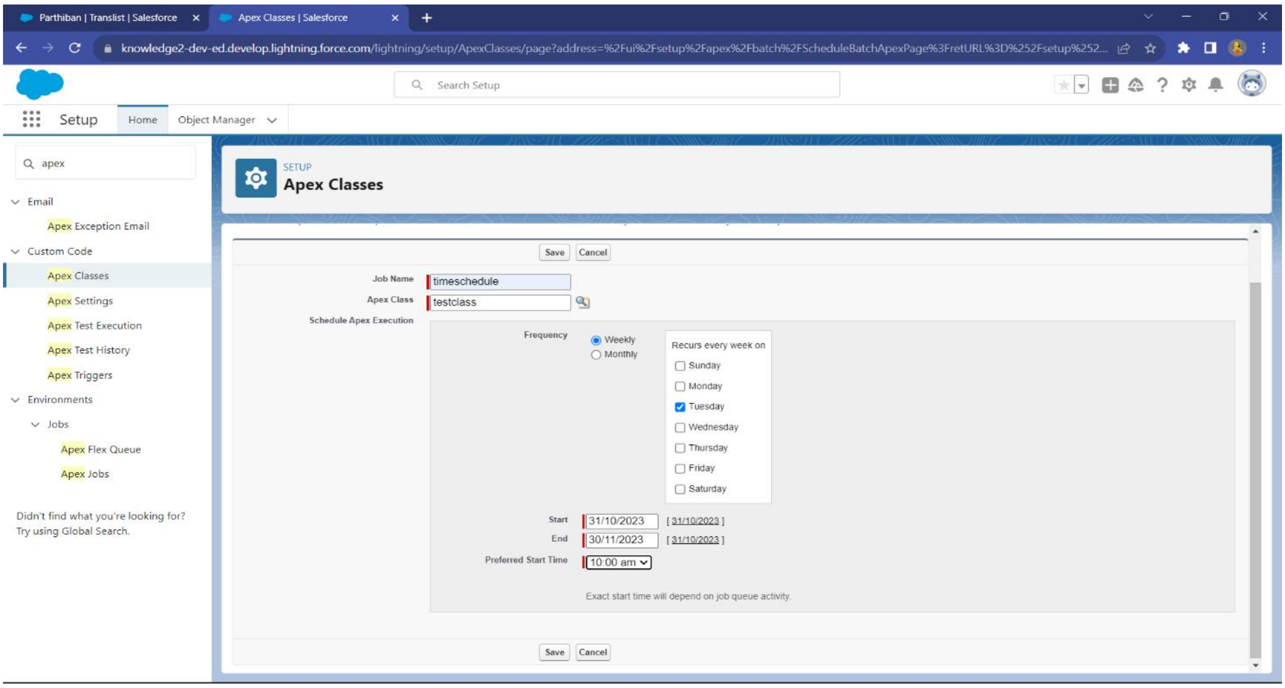
```
                            if(tr.item__c!=s1 )
                            {
                                tc.add(tr);
                            }
                        }
                    Id relatedRecordId = tc[0].item__c;
                    string id1 = tc[0].item__c;
                    string id2 = tc[1].item__c;
                    string id3 = tc[2].item__c;
                    item__C s2 = [SELECT  Name FROM item__c WHERE Id = :id1];
                    item__C s3  = [SELECT  Name FROM item__c WHERE Id = :id2];
                    item__C s4 = [SELECT  Name FROM item__c WHERE Id = :id3];
                    system.debug(s4);
                    Messaging.SingleEmailMessage email = new Messaging.SingleEmailMessage();
                    email.setToAddresses( new List<String>{ts.mailid__c});
                    email.setSubject('Welcome to our company');
                    email.setPlainTextBody('Dear ' + ts.name + ' '+ ',\n\nWelcome to our company!'+'You have been seen as a valuable customer to us
                                           'We are proud to associate with valuable customers like you and we look forward to collaborate with you
                                           +'So why taking a step back, take a leap of faith and shop with us more, while we provide with the valua
                                            Messaging.sendEmail(new List<Messaging.SingleEmailMessage>{email});
                    system.debug(s4);
                    break;
                }
                break;
            }
        }
      }
}
```

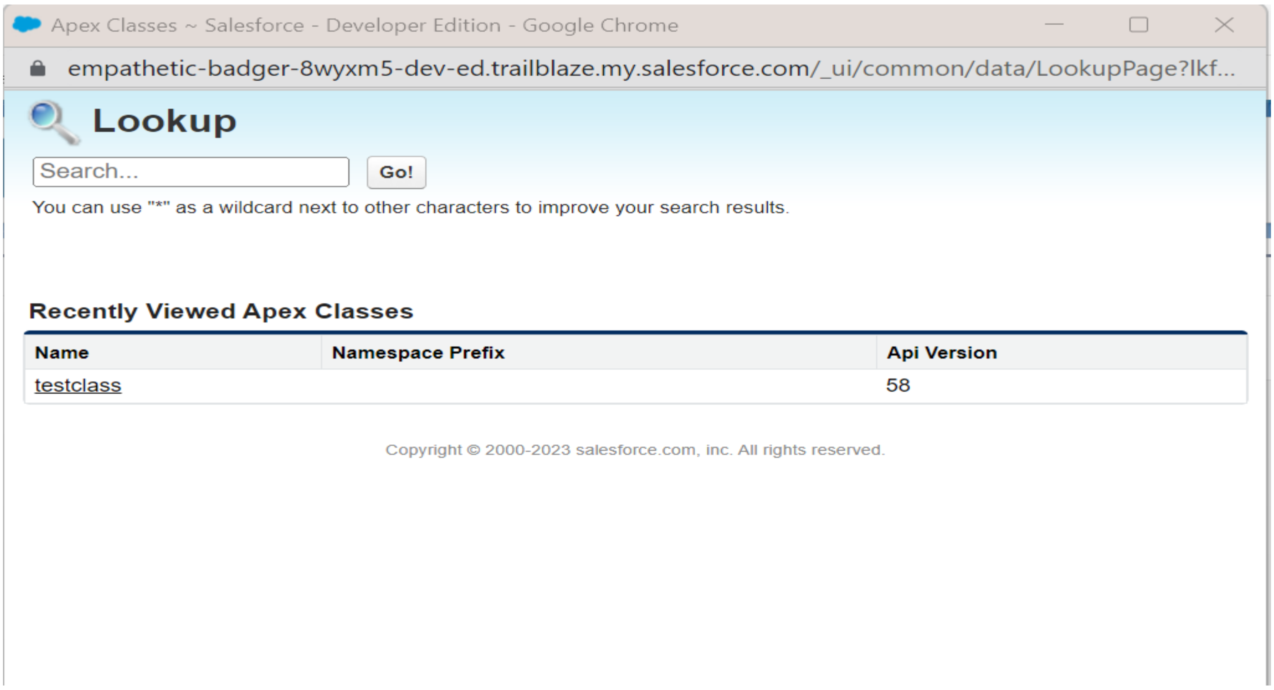
Schedule the Apex class:

1. Go to Home page in your salesforce account.
2. In the search bar, enter Apex and click on Apex Classes.



3. Click on Schedule Apex and enter the Job name.




Apex Classes ~ Salesforce - Developer Edition - Google Chrome
empathetic-badger-8wyxm5-dev-ed.trailblaze.my.salesforce.com/_ui/common/data/LookupPage?lkf...
Lookup
Search...
Go!
You can use "*" as a wildcard next to other characters to improve your search results.
Recently Viewed Apex Classes
Name
Namespace Prefix
Api Version
testclass
58
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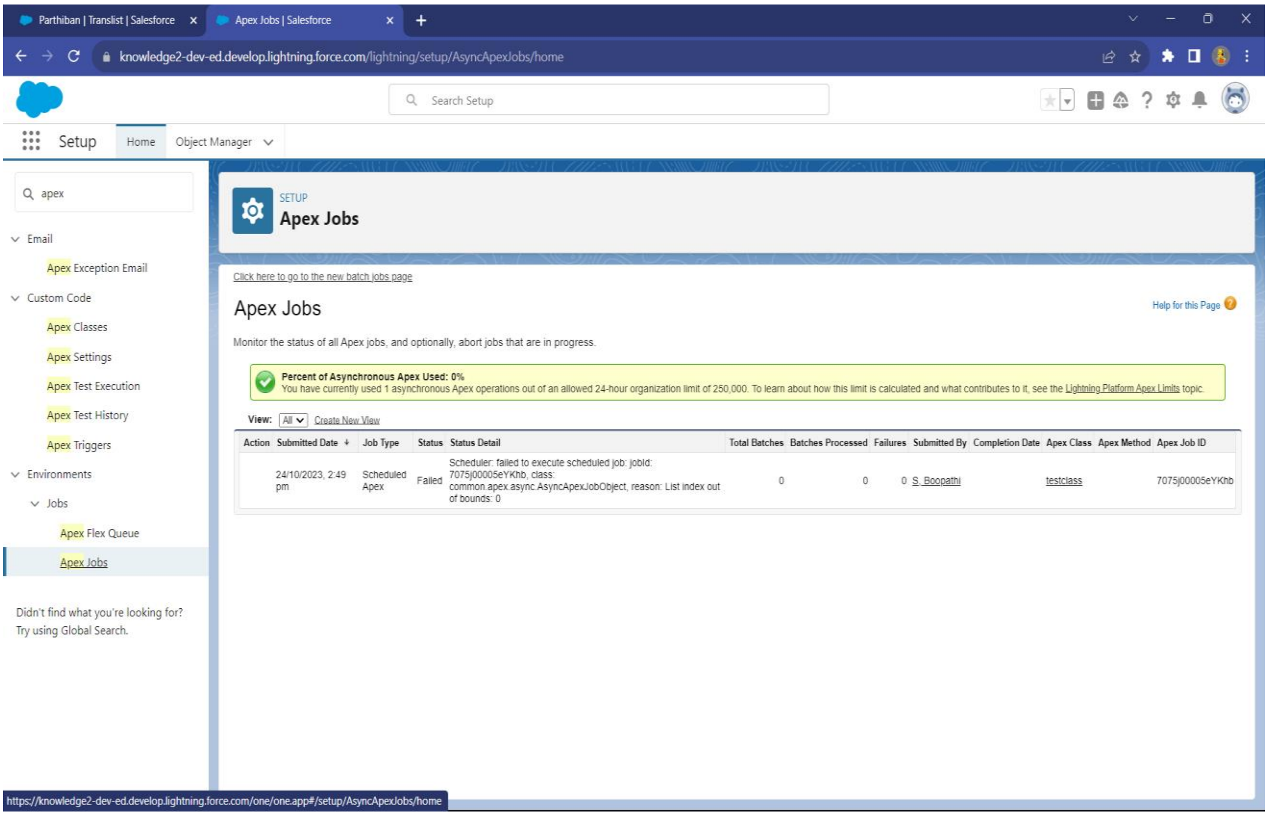

Parthiban | Translist | Salesforce
Apex Jobs | Salesforce
knowledge2-dev-ed.develop.lightning.force.com/lightning/setup/AsyncApexJobs/home
Search Setup
Setup
Home
Object Manager
apex
Email
Apex Exception Email
Custom Code
Apex Classes
Apex Settings
Apex Test Execution
Apex Test History
Apex Triggers
Environments
Jobs
Apex Flex Queue
Apex Jobs
Didn't find what you're looking for? Try using Global Search.
SETUP
Apex Jobs
Click here to go to the new batch jobs page
Apex Jobs
Help for this Page
Monitor the status of all Apex jobs, and optionally, abort jobs that are in progress.
Percent of Asynchronous Apex Used: 0%
View: All
Create New View
Action
Submitted Date
Job Type
Status
Status Detail
Total Batches
Batches Processed
Failures
Submitted By
Completion Date
Apex Class
Apex Method
Apex Job ID
24/10/2023, 2:49 pm
Scheduled Apex
Failed
0
0
0
S. Boopathi
testclass
7075j00005eYKhb
https://knowledge2-dev-ed.develop.lightning.force.com/one/one.app#/setup/AsyncApexJobs/home

CHAPTER-5

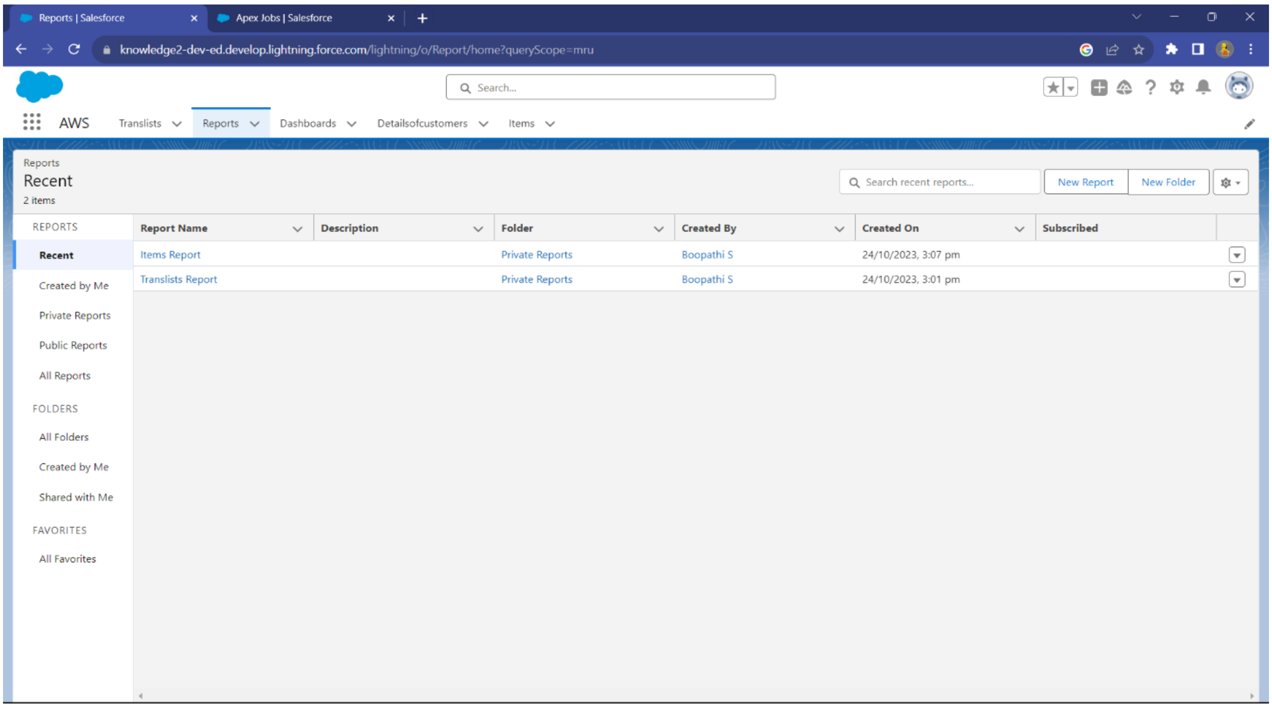
REPORTS & DASHBOARD

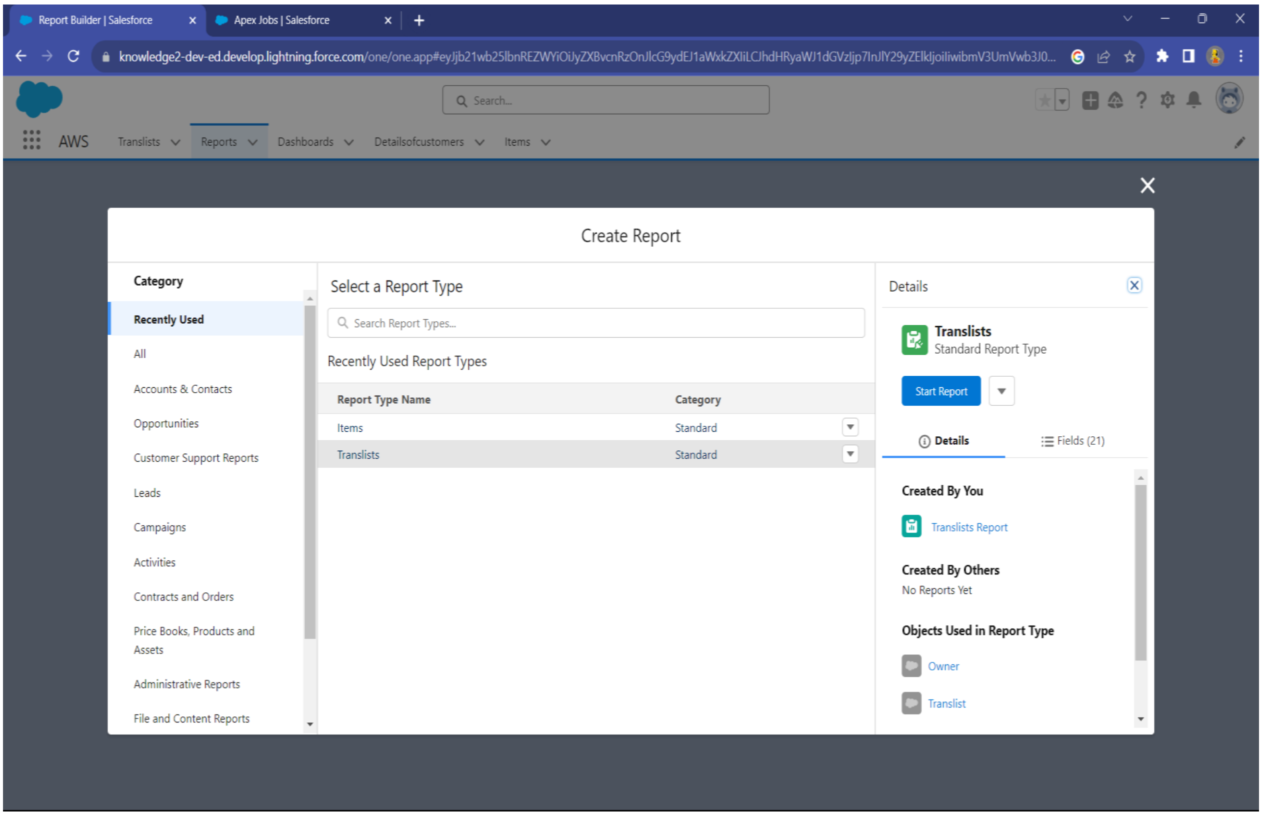
5.1 Reports

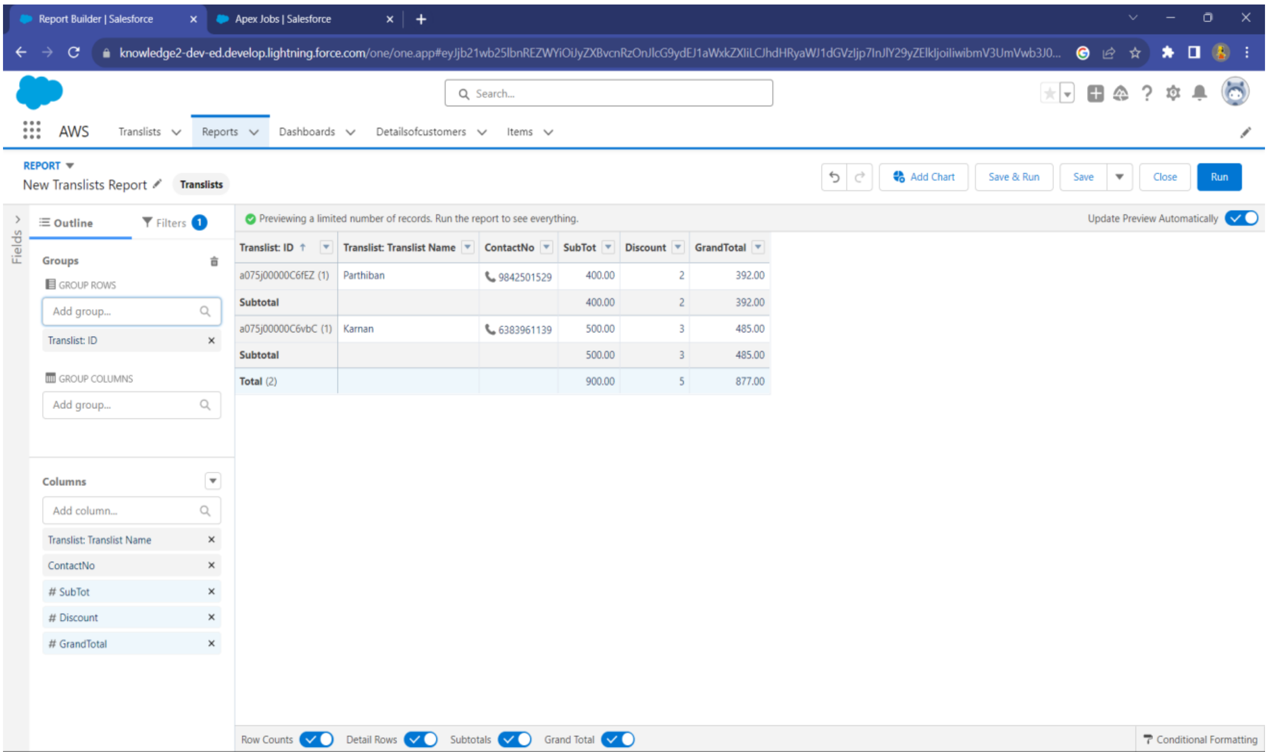
Report for Translists:

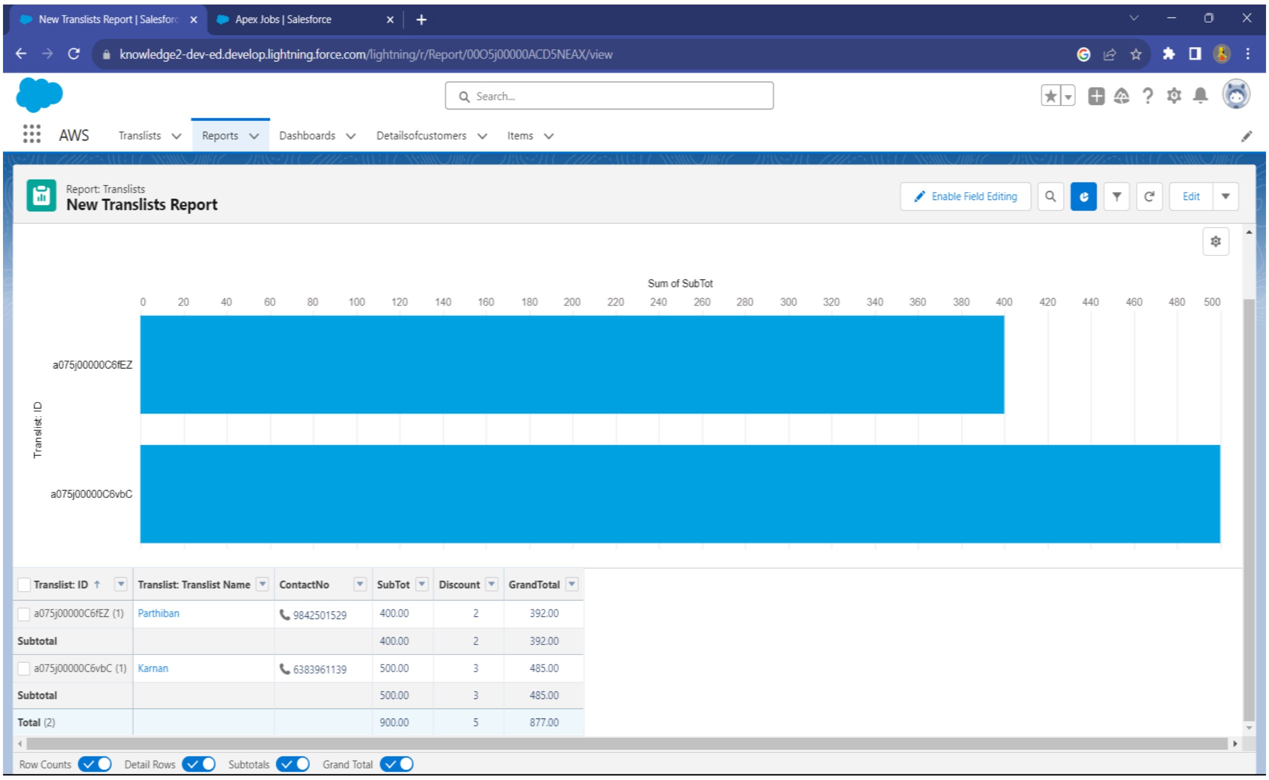
A Salesforce report is a list of data generated based on filter criteria. Salesforce Reports helped us predict trends and gives us the advantage to increase profits.

The report builder provides a drag-and-drop interface to easily build and customize your reports.

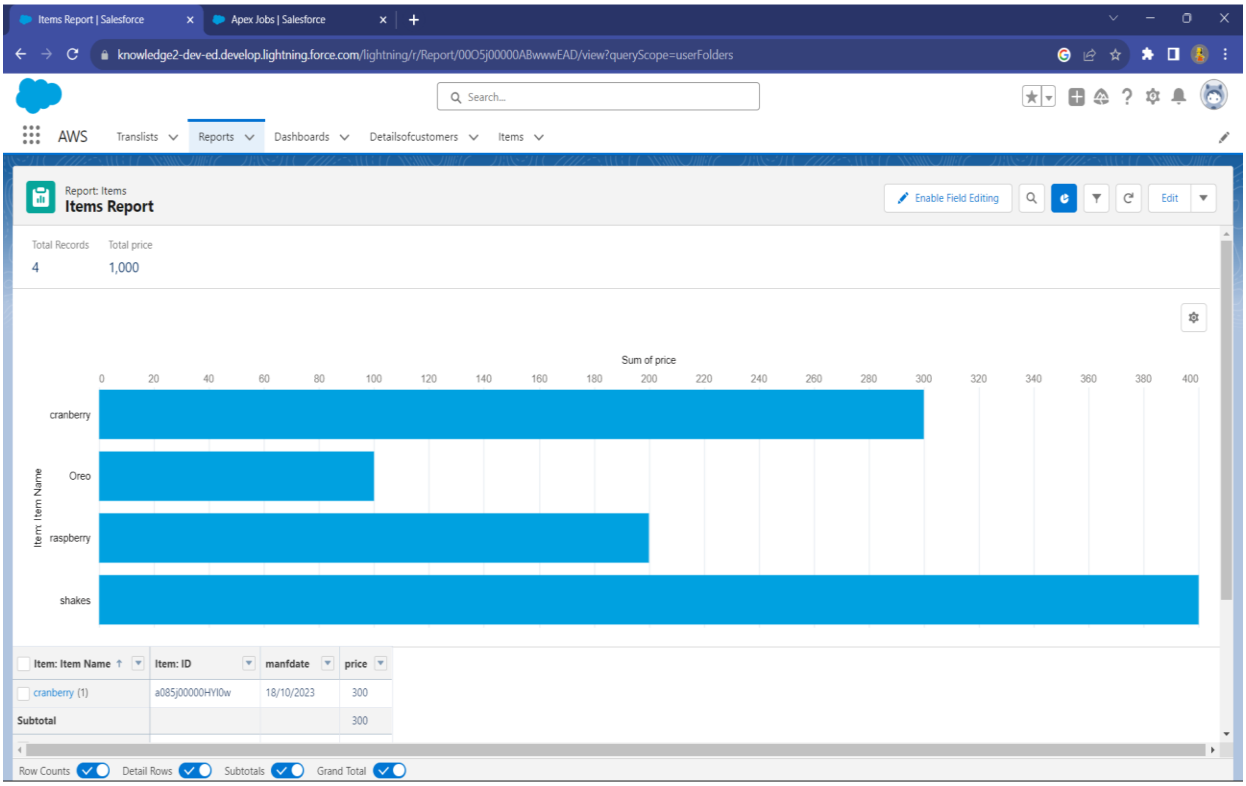



Create Report
Category
Recently Used
All
Accounts & Contacts
Opportunities
Customer Support Reports
Leads
Campaigns
Activities
Contracts and Orders
Price Books, Products and Assets
Administrative Reports
File and Content Reports
Select a Report Type
Recently Used Report Types
Report Type Name
Category
Items
Standard
Translists
Standard
Details
Translists
Standard Report Type
Start Report
Details
Fields (21)
Created By You
Translists Report
Created By Others
No Reports Yet
Objects Used in Report Type
Owner
Translist


REPORT
New Translists Report
Translists
Add Chart
Save & Run
Save
Close
Run
Outline
Filters
Groups
GROUP ROWS
Translist: ID
GROUP COLUMNS
Columns
Translist: Translist Name
ContactNo
SubTot
Discount
GrandTotal
Previewing a limited number of records. Run the report to see everything.
Update Preview Automatically
Translist: ID
Translist: Translist Name
ContactNo
SubTot
Discount
GrandTotal
a075j00000C6fEZ (1)
Parthiban
9842501529
400.00
2
392.00
Subtotal
400.00
2
392.00
a075j00000C6vbC (1)
Karnan
6383961139
500.00
3
485.00
Subtotal
500.00
3
485.00
Total (2)
900.00
5
877.00
Row Counts
Detail Rows
Subtotals
Grand Total
Conditional Formatting

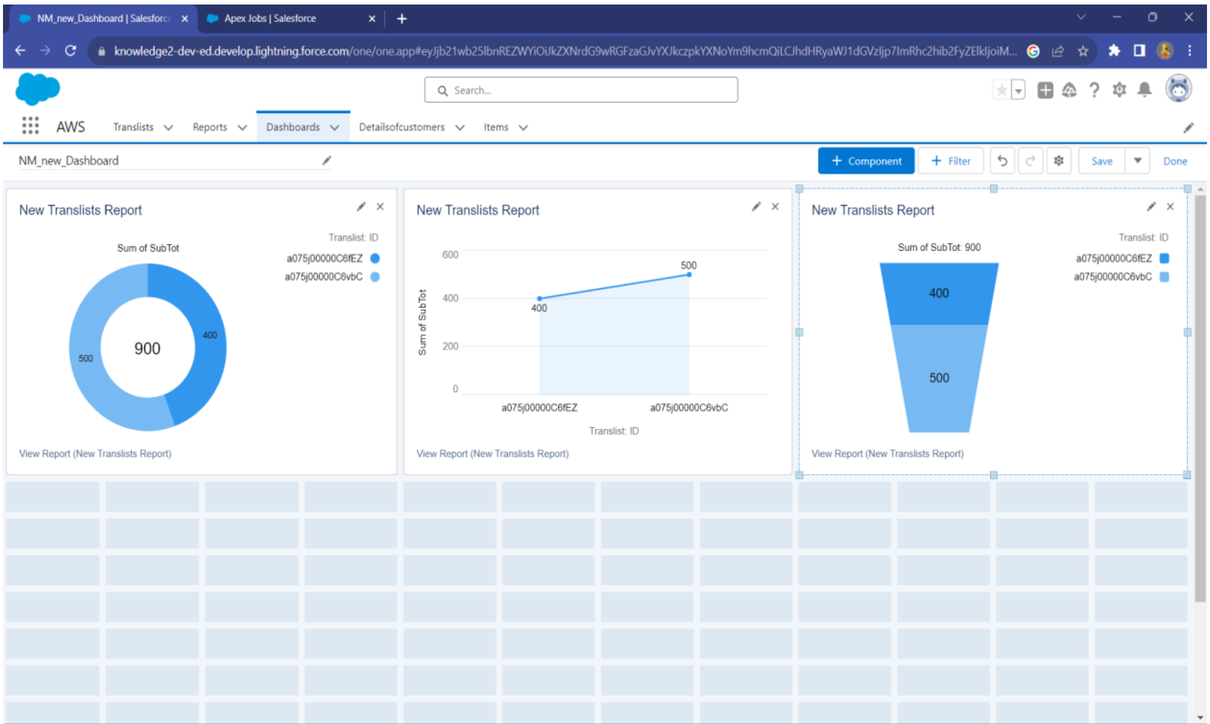


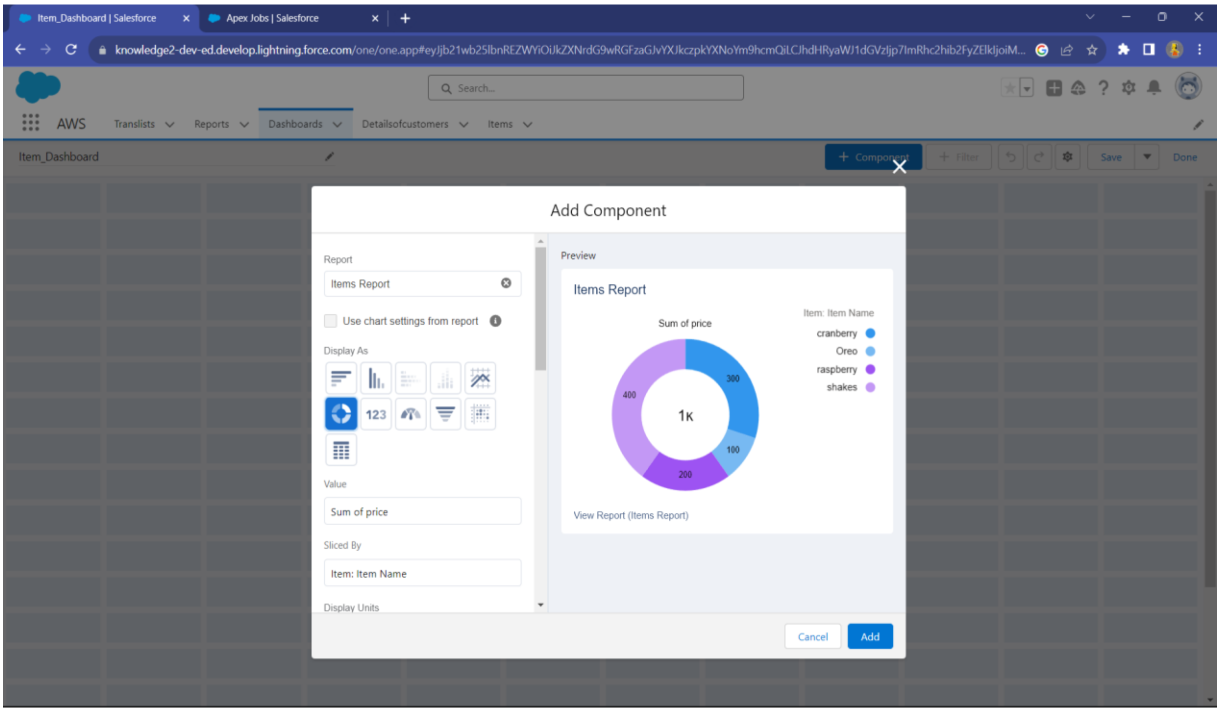
Report for Items:



5.2 Dashboard

A dashboard provides an interactive visual display of key metrics and trends. Multiple dashboard components can be shown together on a single dashboard layout, creating rich visual displays of multiple reports that have a common theme.





CHAPTER-6

CONCLUSION

In conclusion, the CRM application designed for e-commerce activities serves as a strategic cornerstone in the continued growth and success of e-commerce enterprises. This project report has emphasized the critical components and features that underpin an effective CRM system, including data centralization, integration capabilities, personalization, automation, analytics, and multi-channel communication.

This project represents not just a technological achievement, but a fundamental shift in how e-commerce businesses manage and nurture customer relationships. By harnessing the power of a well-crafted CRM application, companies can optimize their operations, increase customer satisfaction, and boost revenue through personalized experiences.

As we wrap up this project, it is essential to stress the importance of ongoing maintenance, data security, and continuous training to ensure the longevity and relevance of the CRM system. The dynamic nature of the e-commerce industry requires adaptability, making the CRM application a critical asset for achieving and sustaining a competitive advantage in the ever-evolving e-commerce landscape.

CHAPTER-7

PROJECT DEMONSTRATION

Github:

https://github.com/Sanjai26/naanmudhalvan-Salesforce-NM2023TMID01805-kiot.git

Demo Link:

https://drive.google.com/file/d/1MrTMycAoWmCiN_ySdOdJ5c9XP3f0EEb1/view?usp=drive_link