

<b>Date</b>	<b>12<sup>th</sup> April 2023</b>
<b>Team ID</b>	<b>NM2023TMID11513</b>
<b>Project Name</b>	<b>RETAIL MANAGEMENT USING SALESFORCE</b>
<b>Team Leader</b>	<b>SHANMUGA PIRIYAN .R</b>
<b>Team Member</b>	<b>RAJAGURU .V</b>
	<b>JABARALI .S</b>
	<b>MARIYAPPAN. R</b>

## 1 INTRODUCTION

### Overview

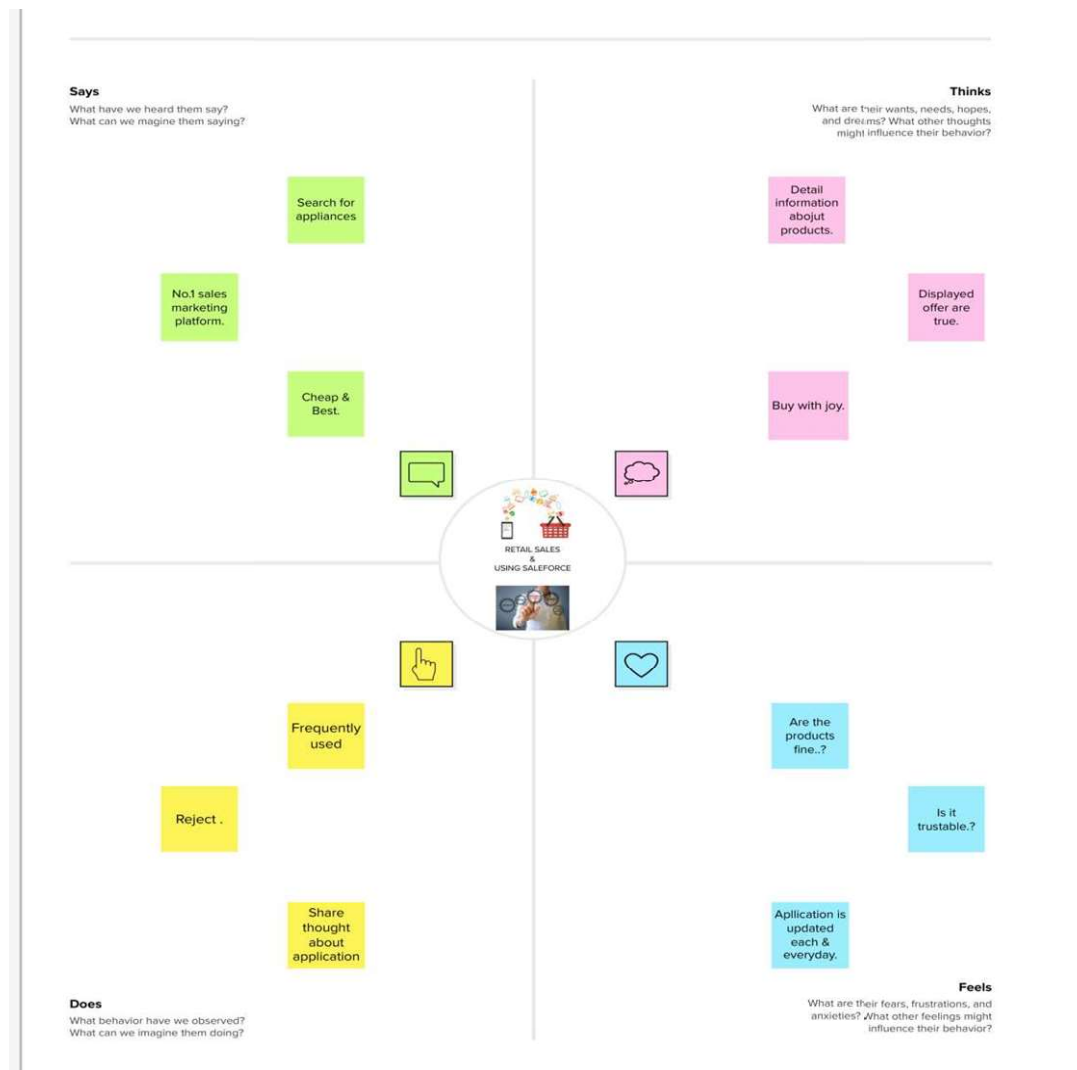
A CRM product owner has requested to create two applications, one is a sales app for sales reps to use this application and store customers data, and the second application is a service app for service reps/agents to provide support to customers in dealing cases. To generate business on top of the customer.

### Purpose

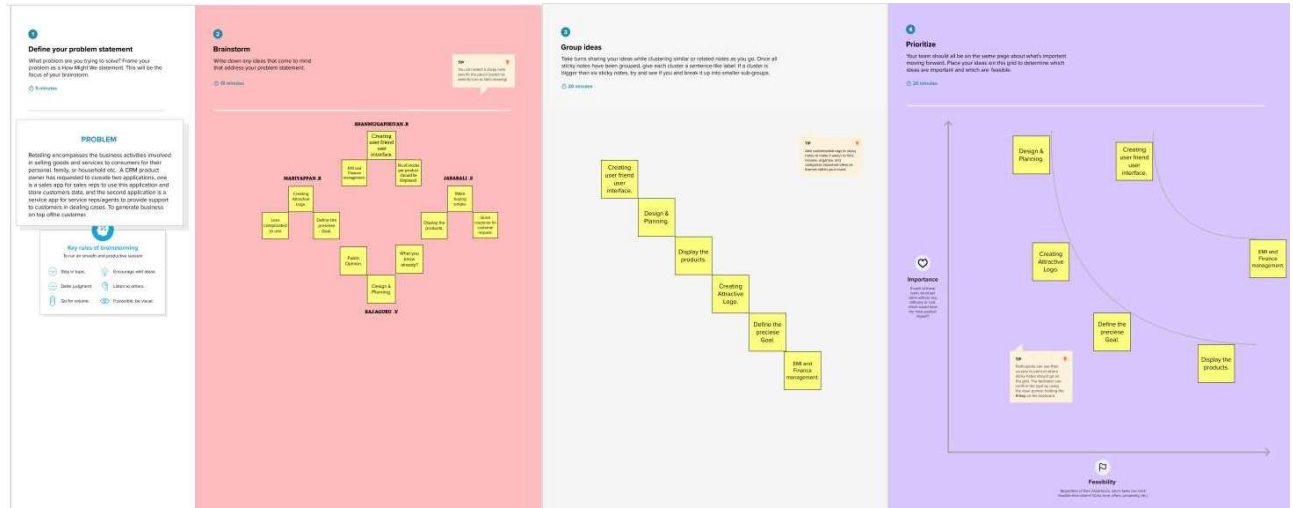
Retailing encompasses the business activities involved in selling goods and services to consumers for their personal, family, or household etc.

## 2 Problem Definition & Design Thinking

### Empathy Map



## Ideation & Brainstorming Map



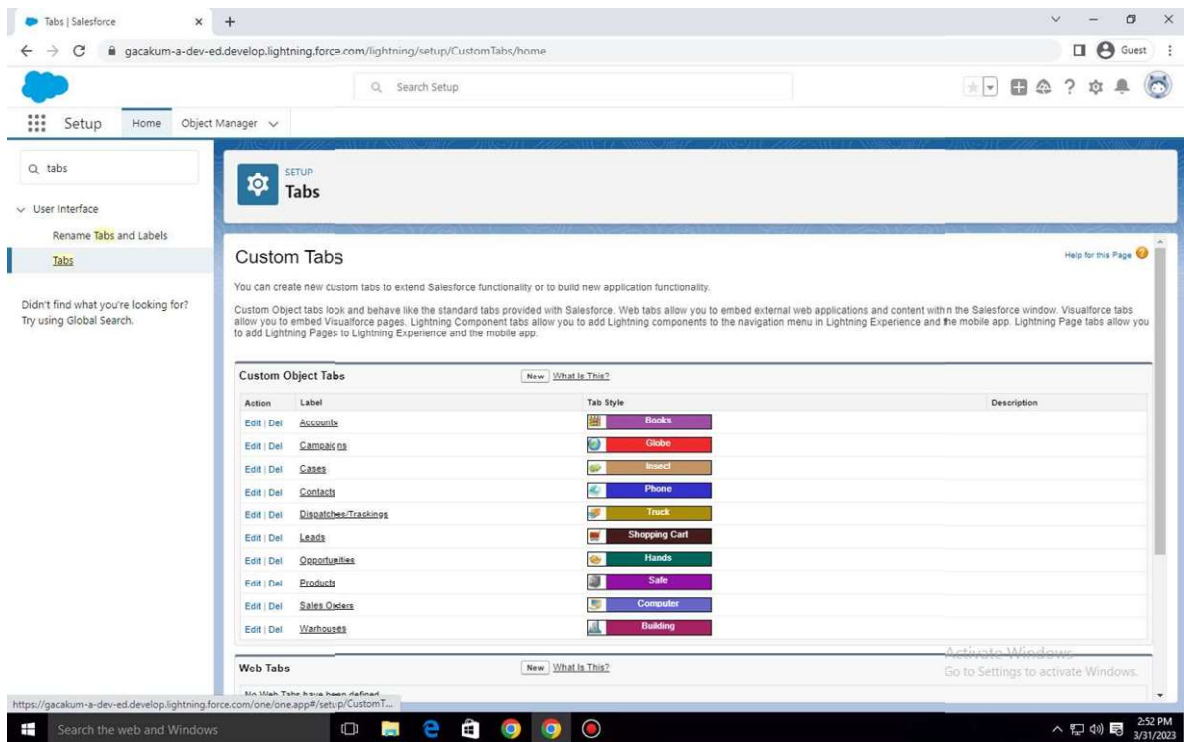
### 3. Result

#### Data Model:

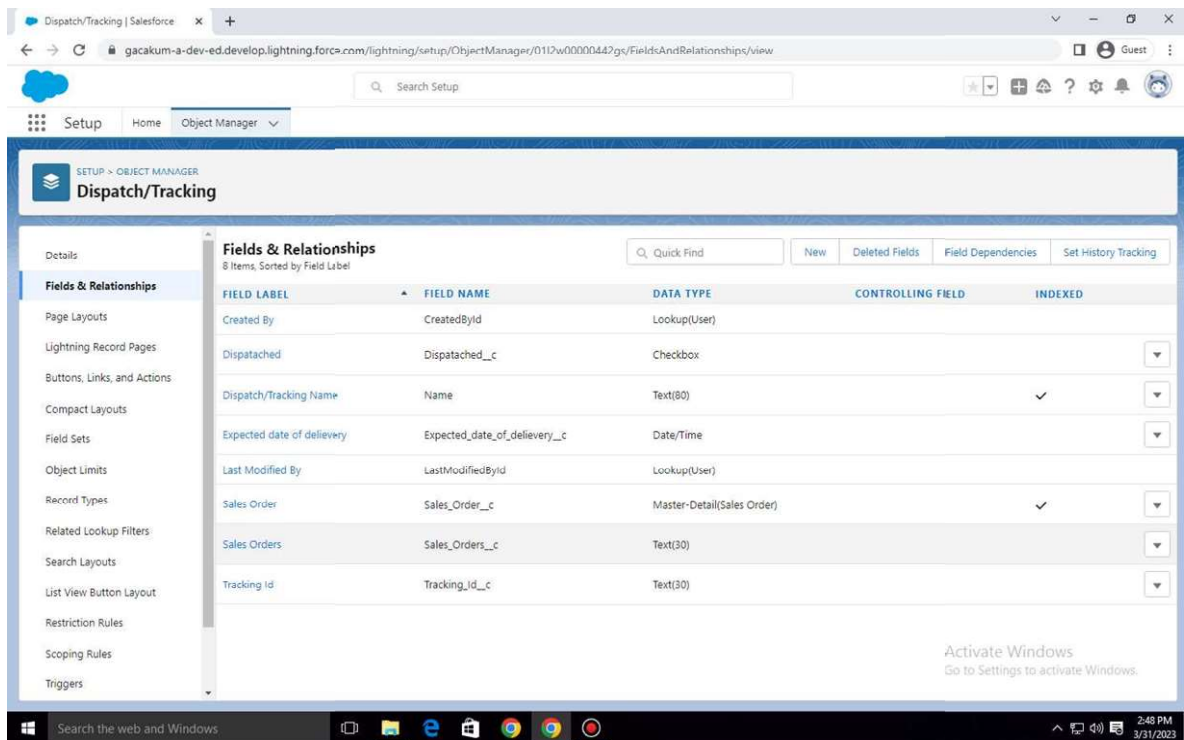
Object name	Fields in the Object	
Campaign	-	
Leads	-	
Accounts	-	
Contacts	-	
Opportunities	-	
Products	-	
Warehouse	-	
Sales order	-	
Dispatch/Tracking	Field Name	Data Type
	Dispatched	Checkbox
	Expected date of delivery	Date/Time
	Trackng Id	Text
	Sales Order	Text
Cases		

## Activity & Screenshot

### Milestone-1

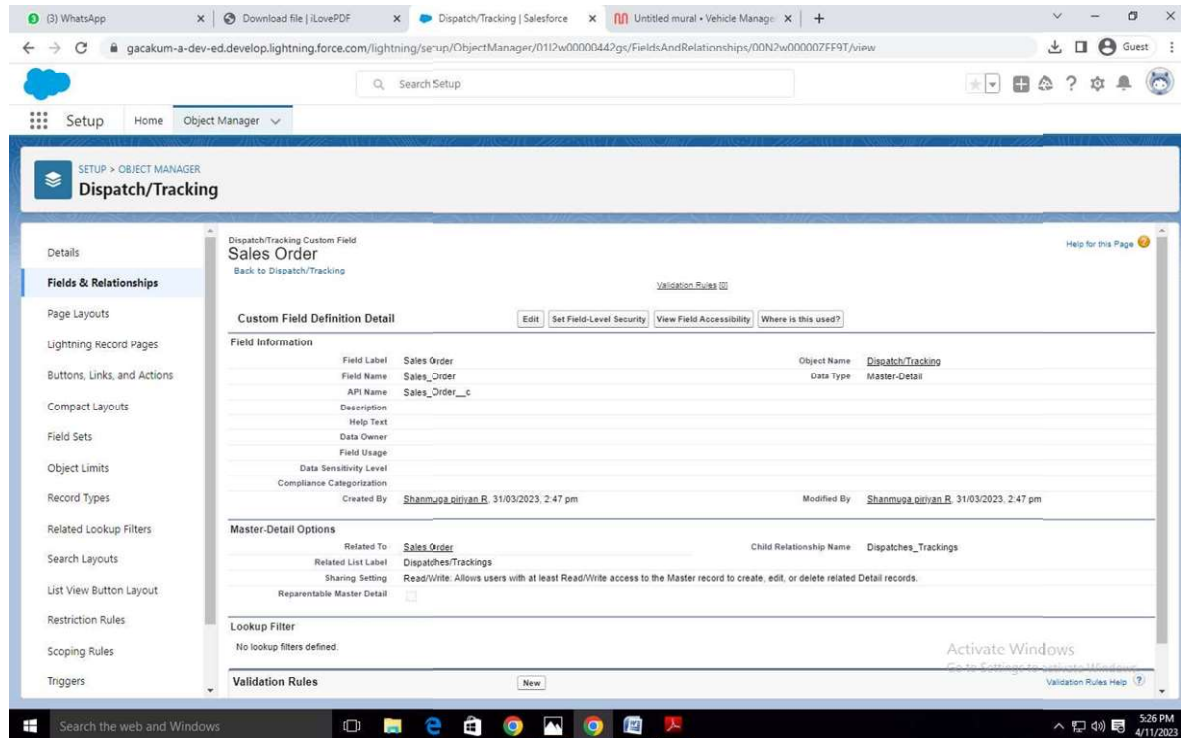


## Creation of object



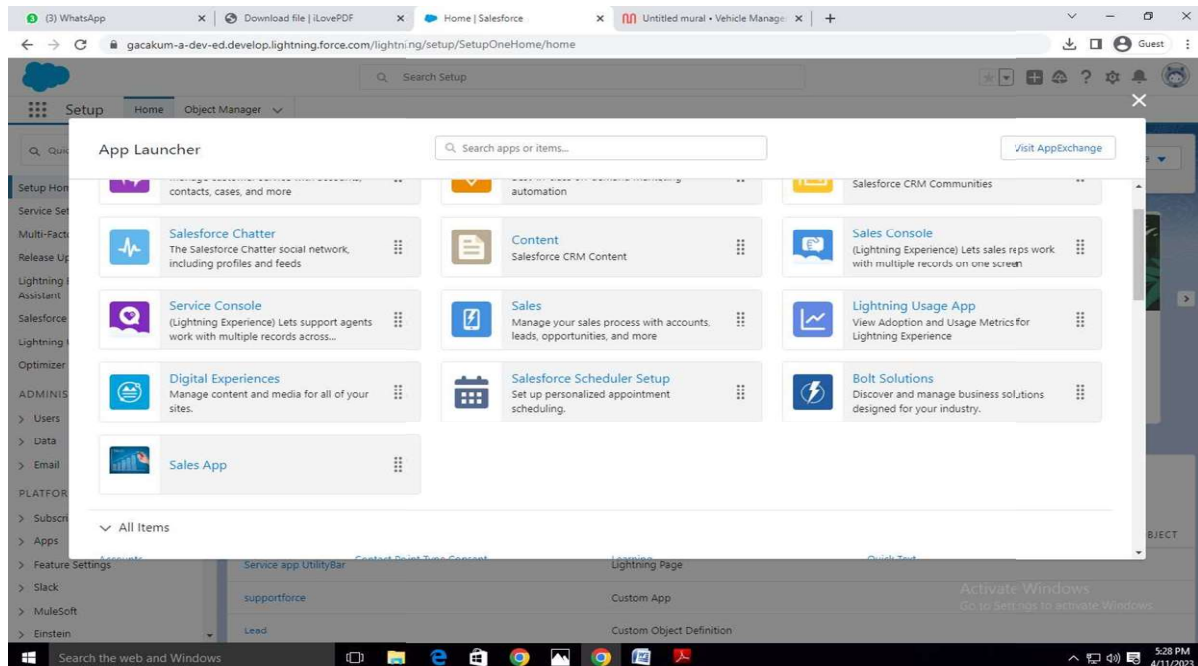
## Creation of fields in Dispatch/Tracking object

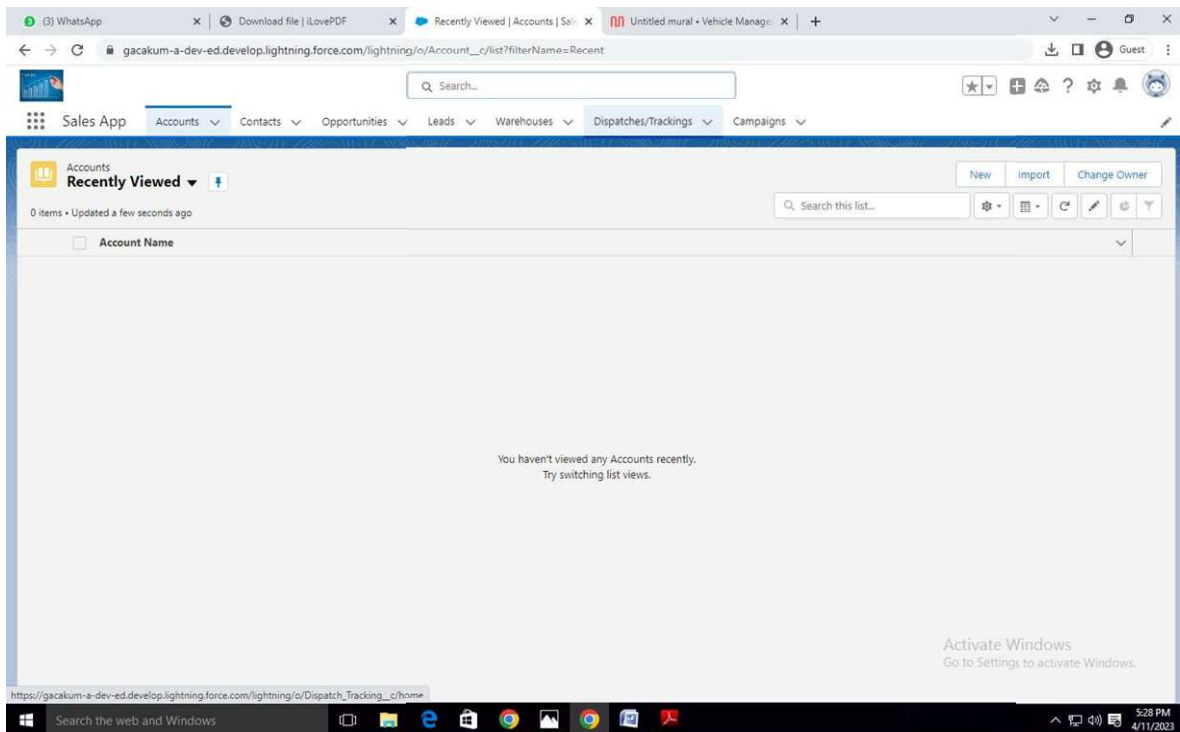
## Milestone-2



## Creation of Master Detail Relationship

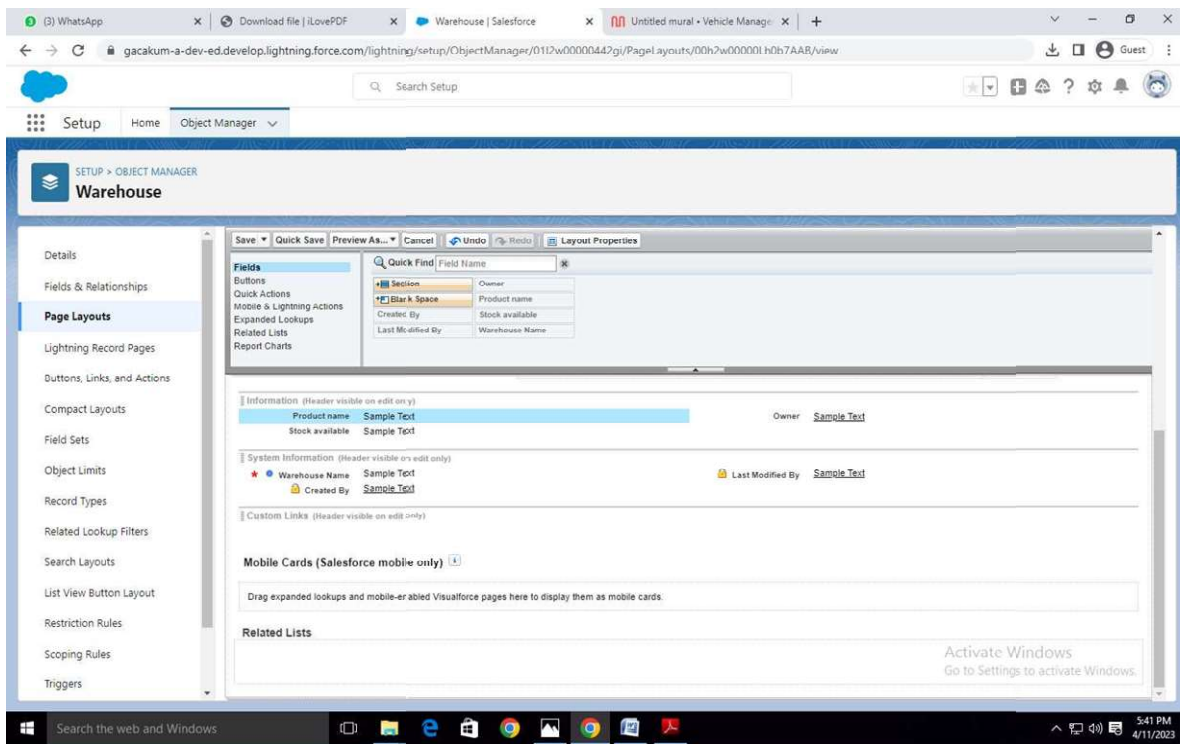
## Milestone-3





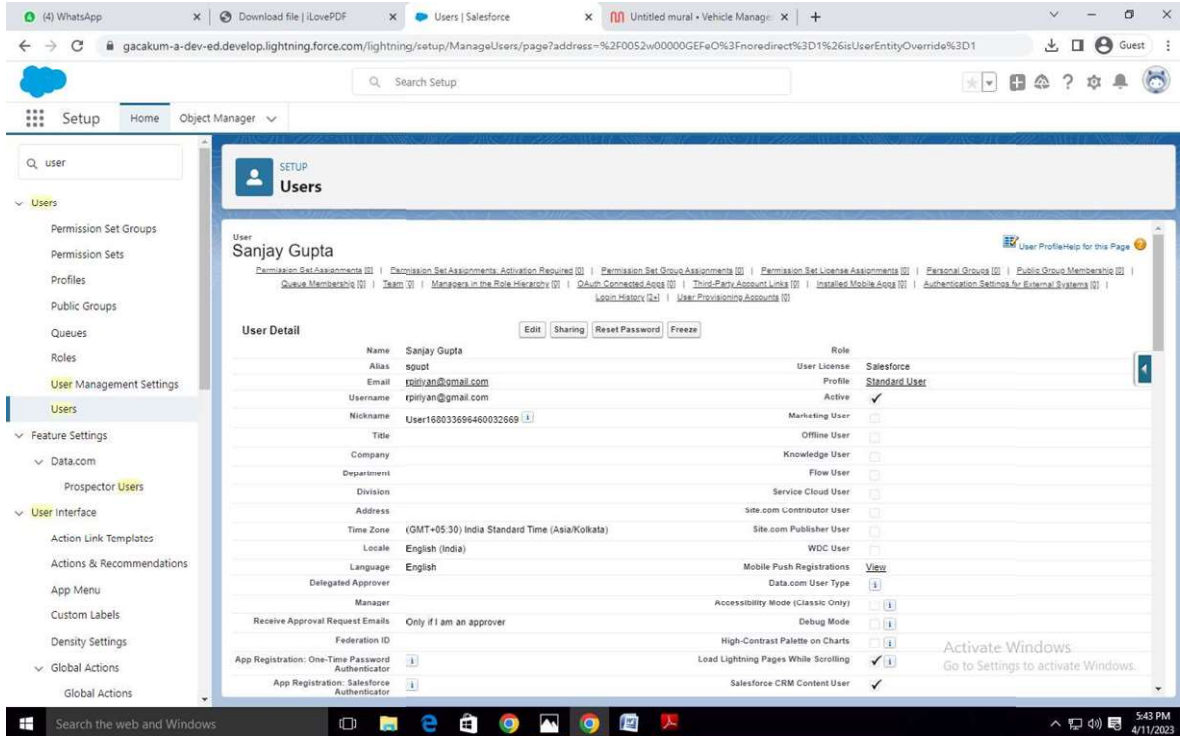
## Creation of sales application

### Milestone-4



## Creation of pagelayout

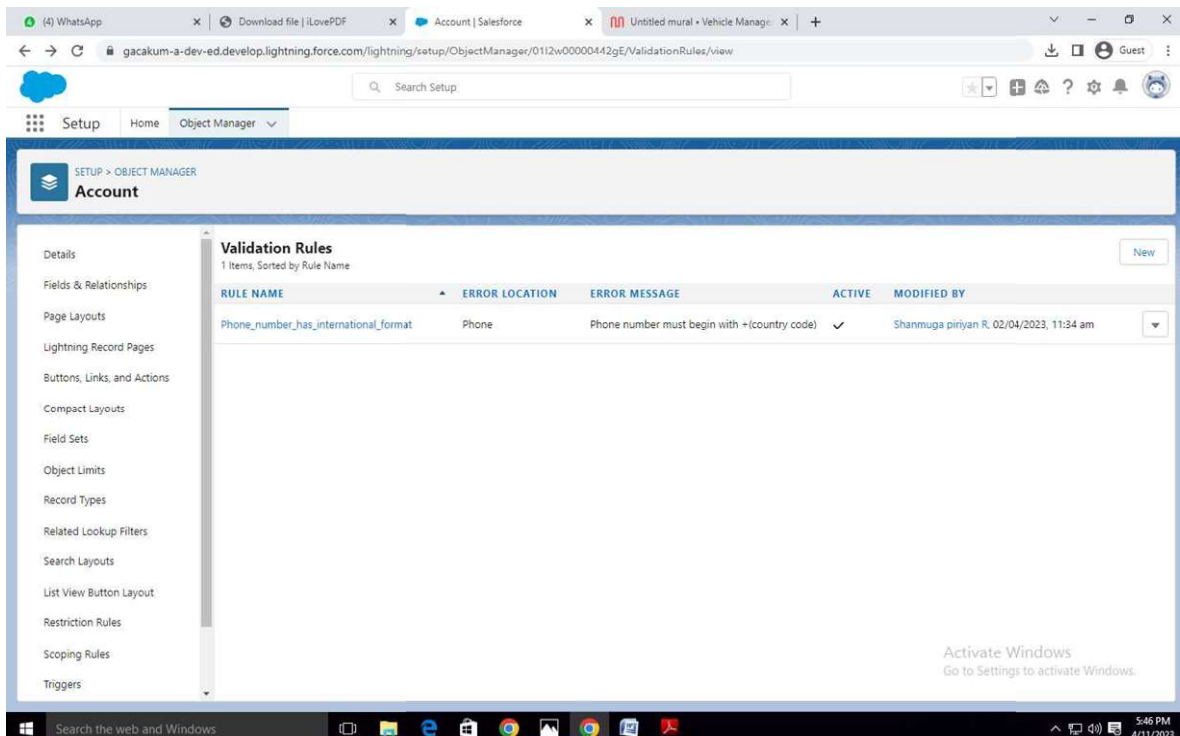
## Milestone-5



The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. The user details for Sanjay Gupta are displayed, including Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, and Delegated Approver. The 'Role' section shows the user is assigned the 'Standard User' profile and is active. The 'User License' is 'Salesforce'. The 'Marketing User' checkbox is checked. The 'Offline User' checkbox is unchecked. The 'Knowledge User' checkbox is unchecked. The 'Flow User' checkbox is unchecked. The 'Service Cloud User' checkbox is unchecked. The 'Site.com Contributor User' checkbox is unchecked. The 'Site.com Publisher User' checkbox is unchecked. The 'WDC User' checkbox is unchecked. The 'Mobile Push Registrations' checkbox is checked. The 'Data.com User Type' is set to 'Standard User'. The 'Accessibility Mode (Classic Only)' is set to 'Standard'. The 'Debug Mode' checkbox is unchecked. The 'High-Contrast Palette on Charts' checkbox is unchecked. The 'Load Lightning Pages While Scrolling' checkbox is checked. The 'Salesforce CRM Content User' checkbox is checked. The 'Receive Approval Request Emails' checkbox is checked. The 'Federation ID' is set to 'Only if I am an approver'. The 'App Registration: One-Time Password Authenticator' is set to 'Standard'. The 'App Registration: Salesforce Authenticator' is set to 'Standard'. The 'Salesforce CRM Content User' checkbox is checked.

## Creation of user

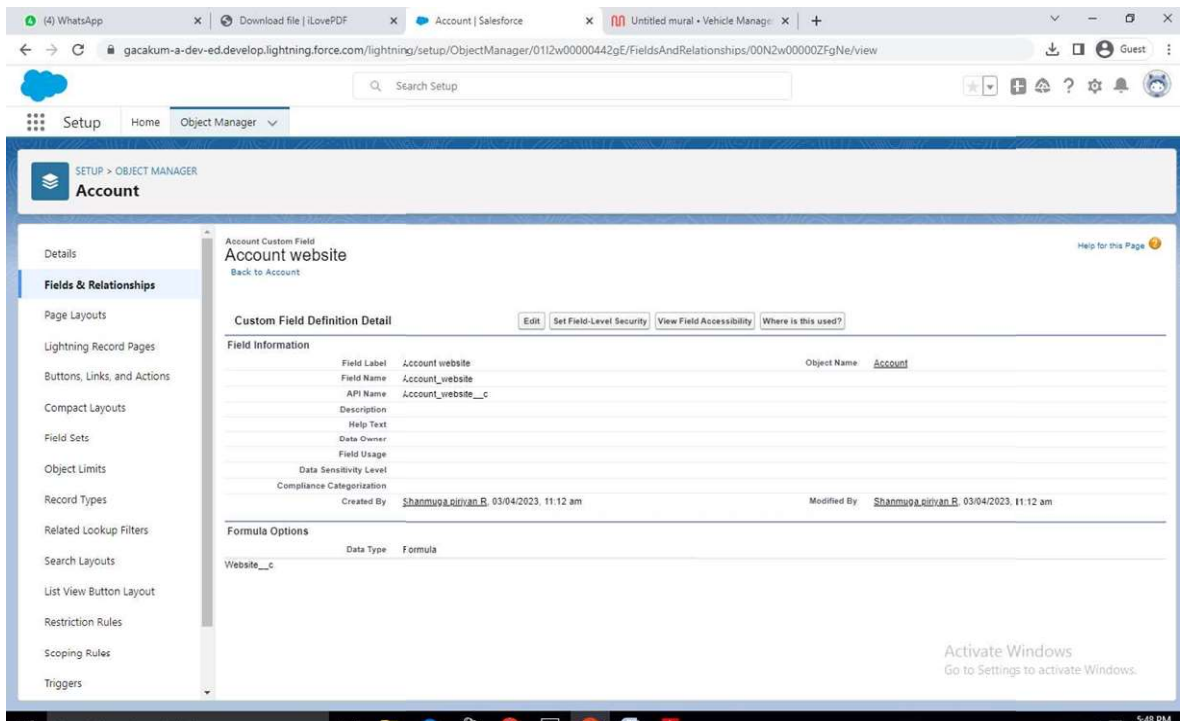
## Milestone-6



The screenshot shows the Salesforce Setup interface with the 'Validation Rules' tab selected. The validation rule 'Phone\_number\_has\_international\_format' is displayed. The rule is active and was modified by Shanmuga priyan R. on 02/04/2023 at 11:34 am. The rule name is 'Phone\_number\_has\_international\_format', the error location is 'Phone', and the error message is 'Phone number must begin with +(country code)'. The rule is active and was modified by Shanmuga priyan R. on 02/04/2023 at 11:34 am.

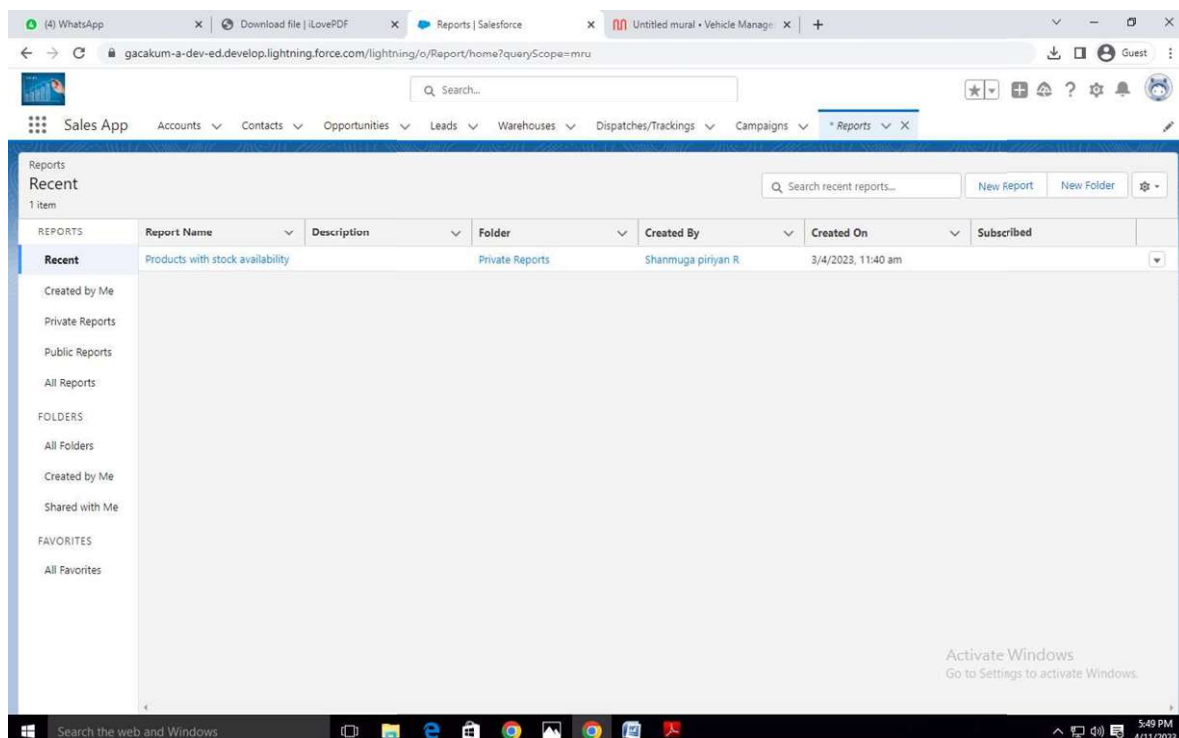
## Creation of validation rules





## Creation of cross object formula

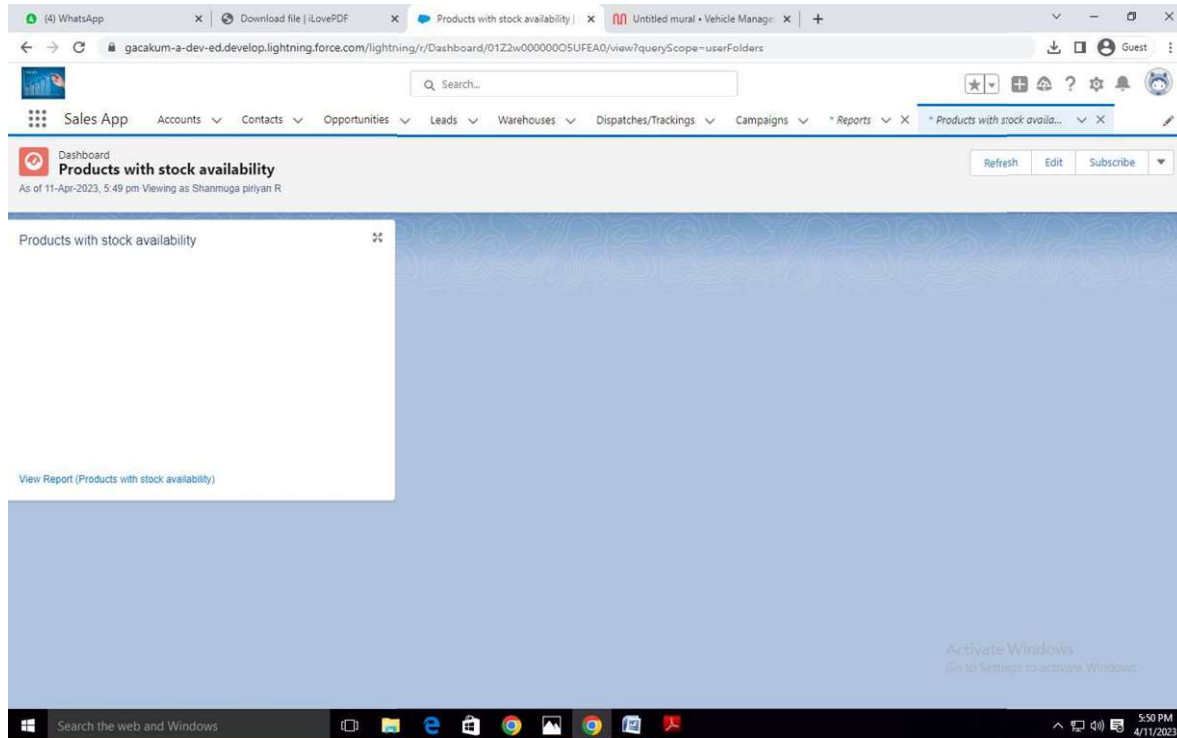
### Milestone-7



## Creating report



## Milestone-8



### Creation of dashboard

## 4 Trailhead Profile Public URL

Team Lead – <https://trailblazer.me/id/shanr51>

Team Member 1 - <https://trailblazer.me/id/marir45>

Team Member 2 –<https://trailblazer.me/id/rvairavasundharam>

Team Member 3 –<https://trailblazer.me/id/jshaikhussain>

## 5 Advantages & Disadvantages

- ❖ This application is easy to access
- ❖ It gives better service
- ❖ Easily track status or orders
- ❖ It may have some errors

### 6 APPLICATIONS

- ❖ Bill the new stock ordered
- ❖ Track the stock
- ❖ Invoice printing
- ❖ Vendor management

### 7 CONCLUSION

This system will be an absolute solution for any retail since it covers all main system requirements any retail has. Since one of the main goals of any retail is to make profit the computer based system which will make that happen without any complex setups.

### 8 FUTURE SCOPE

In the 21<sup>st</sup> century each and every field is computerized and all works are done by using the modern technologies so it has a good future.