



RETAIL MANAGEMENT APPLICATION USING

SALESFORCE NAAN MUDHALVAN PROJECT REPORT

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BONAFIDE CERTIFICATE

Certified that this project report titled "**RETAIL MANAGEMENT APPLICATION USING SALESFORCE**" is the Bonafide work of "**MENAKA E (611420104301), SOWMIYA P (611420104076), SUJATHA R (611420104079), SUSMITHA P (611420104081), VAITHESWARI M (611420104088)**" who carried out the project work under my supervision.

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ACKNOWLEDGEMENT

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1. INTRODUCTION

Salesforce, a leading cloud-based Customer Relationship Management (CRM) platform, is a pivotal tool for organizations to manage customer data, optimize sales processes, and elevate customer interactions. Its multifaceted features include Sales

Cloud, which enhances sales management through lead tracking, opportunity management, and seamless email integration. Service Cloud focuses on exceptional customer support, featuring case management, knowledge base development, and multi-channel support. Marketing Cloud empowers businesses with marketing automation, email campaigns, social media engagement, and in-depth analytics. Salesforce's hallmark is its customizability, allowing businesses to tailor the platform to meet specific requirements, while robust integration capabilities facilitate seamless connections with other business applications.

The platform equips businesses with powerful reporting and analytics tools, enabling data-driven decisions and insightful, customized reports and dashboards. Salesforce ensures mobile accessibility, enabling users to stay connected and productive while on the move. A paramount emphasis on data security and compliance guarantees data protection and privacy. Whether you're a small start-up or a large enterprise, Salesforce offers scalability to accommodate your evolving needs.

Through Salesforce, organizations foster improved customer relationships, increased sales efficiency, and superior customer support. It empowers businesses to make data-driven decisions, streamline operations, and create impactful, targeted marketing campaigns. This introduction encapsulates Salesforce's capabilities and benefits, offering a concise overview for your project document, allowing for a better understanding of how the platform can contribute to your specific project goals.

2.PROJECT SPECIFICATIONS

2.1 Project Goal 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.

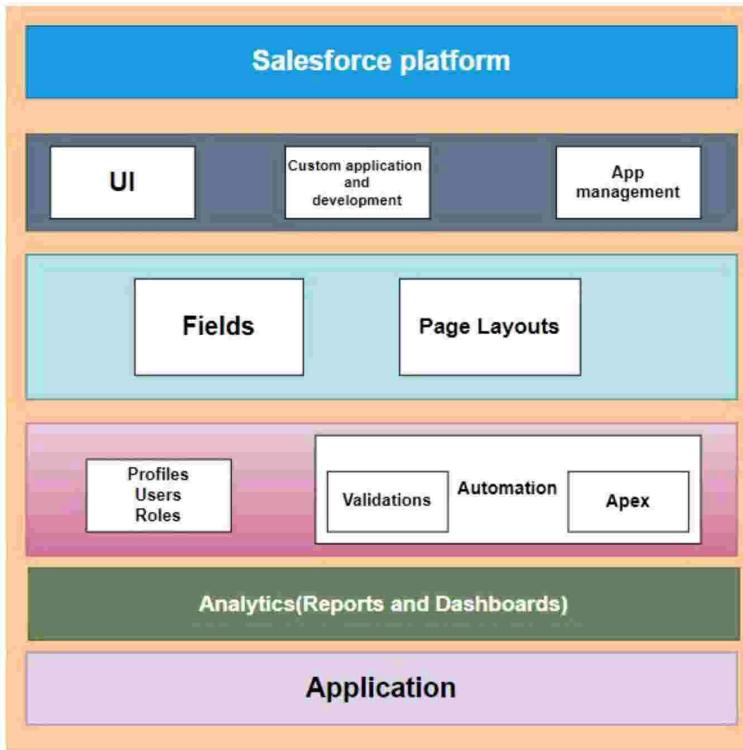
2.2 Project Scope

- **Object Creation (Milestone 1):** Custom objects and relationships will be defined to efficiently store and manage data related to Warehouse, Sales order and other relevant information.
- **Tabs Creation (Milestone 2):** Tabs will be configured to provide user-friendly access to different sections and functionalities within the CRM application.
- **Lightning App (Milestone 3):** The CRM application will be created, and it will serve as the central hub for managing application function by working together as a unit.
- **Fields & Relationships (Milestone 4):** Custom fields and relationships will be established to capture specific data attribute values that are required for a particular object in a record.
- **Users (Milestone 5):** A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account.
- **Validation Rules (Milestone 6):** As a crm product owner they requested to create a validation rule on account object on the phone field. It verify that the data a user enters in a

record meets the standards you specify before the user can save the record

- **User Adoption (Milestone 7):** Strategies and tools will be implemented to encourage user adoption and make the application user-friendly.
- **Reports (Milestone 8):** Custom reports will be created to track and analyse data, providing valuable insights for users.
- **Dashboards (Milestone 9):** Dashboards will be designed to display key performance indicators and visual summaries of application data.
- **Flows (Milestone 10):** Flow is the most powerful automation tool. It can be trigger for record insert, update and. record delete and it can be run for both after and before events
- The project aims to create a 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.

2.3 Technical Requirements



2.4 Functional Requirements

Customer Management: Create and manage customer profiles. Track customer purchase history and preferences. Implement loyalty programs and rewards.

Inventory Management: Maintain a database of products, including descriptions, prices, and quantities. Handle stock levels, reordering, and alerts for low inventory. Integrate with barcode scanners for efficient stock management.

Sales Order Processing: Create and process sales orders. Generate invoices and receipts. Handle returns and refunds.

Point of Sale (POS):

Implement a user-friendly POS system for in-store sales. Process payments, including cash, card, and digital payments. Issue receipts and track real-time sales data.

E-commerce Integration: Integrate with e-commerce platforms for online sales. Synchronize product catalog, pricing, and inventory.

Multi-Channel Sales: Support sales across various channels, including brick-and-mortar stores, online, and mobile apps.

Reporting and Analytics: Generate sales reports, including sales by product, store, and region. Provide real-time analytics to help with decision-making.

Employee Management: Manage employee schedules and time tracking. Track employee performance and incentives.

Supplier Management: Maintain a database of suppliers and their products. Automate purchase order creation.

Customer Support and CRM: Implement customer support features.

Integrate with customer relationship management tools.

Inventory Forecasting: Use data analytics to predict inventory needs.

Minimize overstock and understock situations.

Security and Compliance: Ensure data security and compliance with industry regulations.

Integration with Payment Gateways: Support various payment gateways and ensure secure transactions.

Mobile Accessibility: Provide mobile access for on-the-go management.

User Permissions and Roles: Define roles and permissions for different users to control access to sensitive data.

Marketing and Promotions: Implement marketing campaigns, discounts, and promotions.

Localization: Support multiple languages, currencies, and tax regulations for global retail operations.

Feedback and Reviews: Collect and manage customer feedback and reviews.

Returns and Refunds Management: Handle returns and refunds efficiently, including inventory adjustments.

Third-Party Integrations: Integrate with third-party systems for accounting, shipping, and more

3.PREPARATION DATA MODELING

Objects:

Salesforce objects are database tables that permit you to store data that is specific to an organization. It consists of fields (columns) and records (rows).

Salesforce objects are of two types:

1.Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.

2.Custom Objects: Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

In This Application We Use 4 Custom Objects:

1.Warehouse

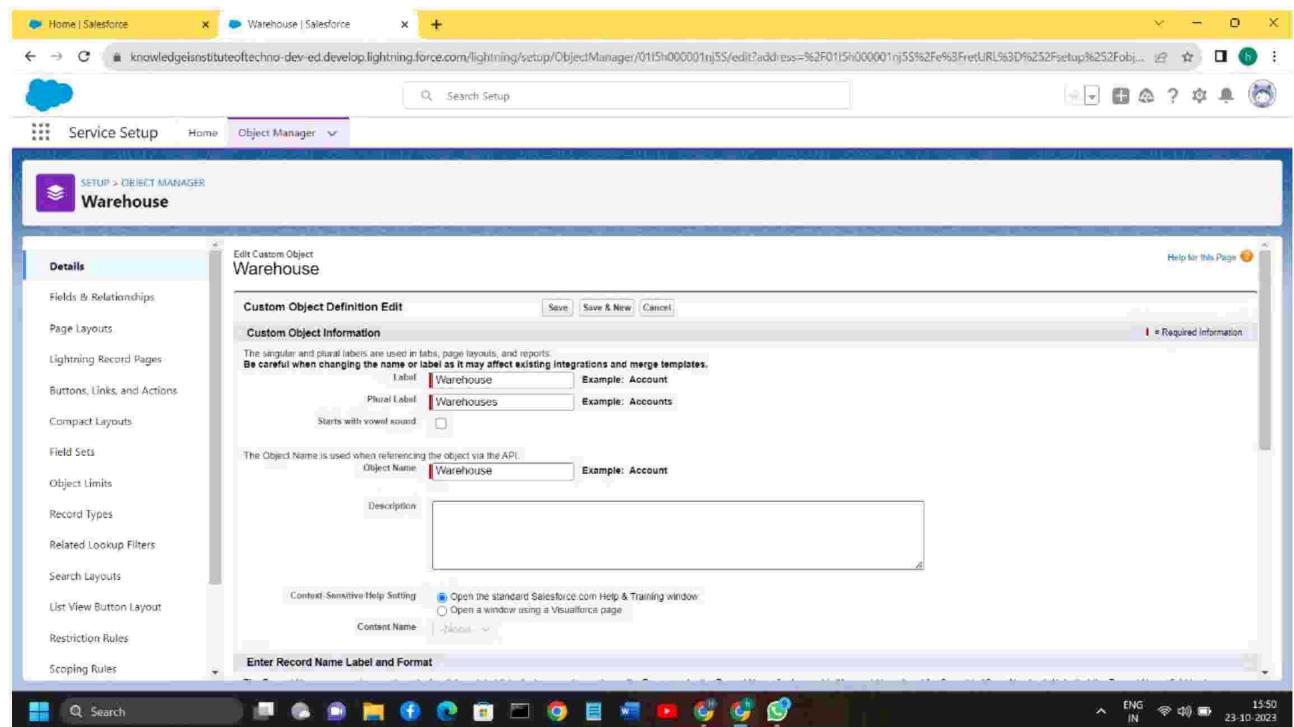
2.Sales order

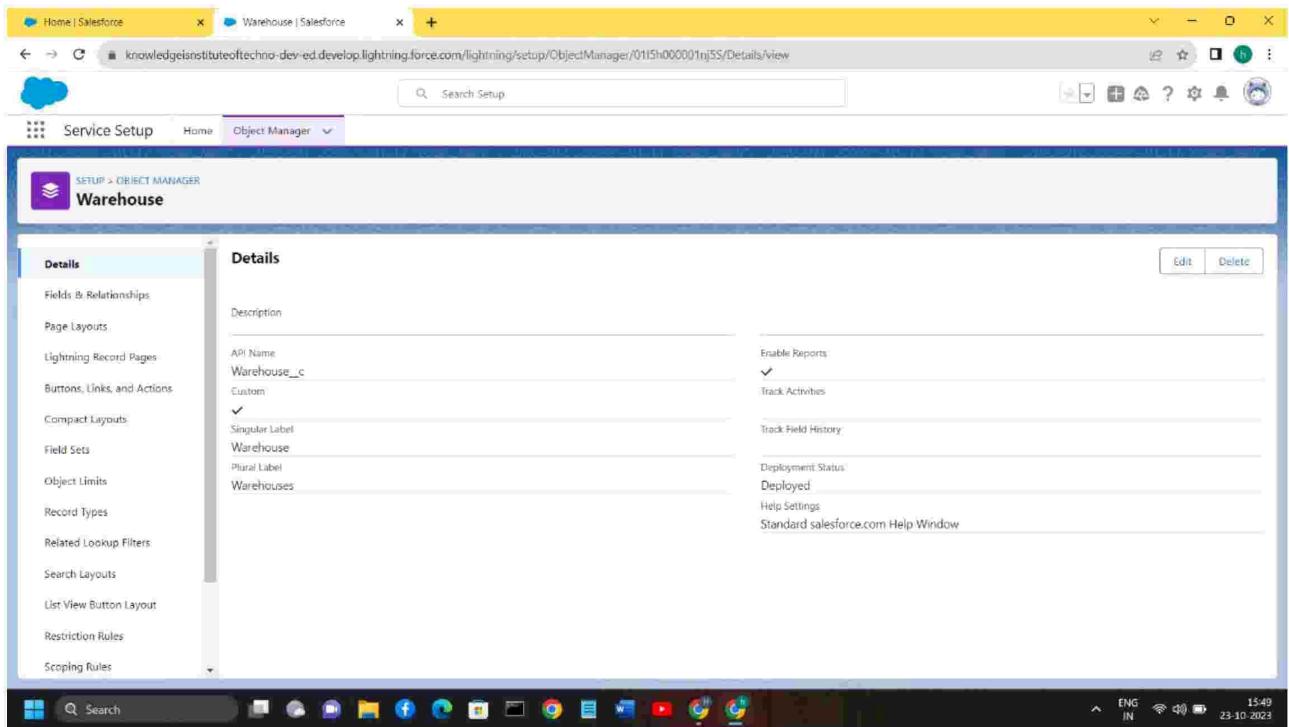
3.Dispatch/Tracking

4.Dispatch/Delivery

1)Create A Custom Object for Warehouse:

- 1.From setup click on object manager.
- 2.Click create, select custom object.
- 3.Fill in the label as " Warehouse ".
- 4.Fill in the plural label as " Warehouses ".
- 5.Record name: " Warehouse Name "
- 6.Select the data type as "Text".
- 7.In the Optional Features section, select Allow Reports .
- 8.In the Search Status section, select Allow Search.
- 9.In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.





10. Leave everything else as is, and click Save.

2) Creation of Jobs Object

1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
4. On the Custom Object Definition page, create the object as follows:
 5. Label: Sales order
 6. Plural Label: Sales orders
 7. Record Name: Sales Name
 8. Select the data type as "Text".
 9. Check the Allow Reports checkbox
 10. Check the Allow Search checkbox

11.In the Object Creation Options section, select Add Notes and Attachments related list to default page layout 12.Click Save.

The image contains two screenshots of the Salesforce Setup interface, both titled "Sales order | Salesforce".

Screenshot 1 (Top): Details Tab

This screenshot shows the "Details" tab of the object configuration. On the left, a sidebar lists various settings like Fields & Relationships, Page Layouts, and Record Types. The main pane displays the following details:

- Description:** API Name: Sales_c, Custom checked.
- Labels:** Singular Label: Sales order, Plural Label: Sales orders.
- Advanced Settings:** Enable Reports (checked), Track Activities, Track Field History, Deployment Status (Deployed), Help Settings, Standard salesforce.com Help Window.

Screenshot 2 (Bottom): Edit Custom Object Tab

This screenshot shows the "Edit Custom Object" screen for the Sales Order object. It includes a "Custom Object Definition Edit" header with "Save", "Save & New", and "Cancel" buttons. The "Custom Object Information" section contains fields for "Label" (Sales order) and "Plural Label" (Sales orders). A note states: "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." Below this are fields for "Object Name" (Sales) and "Description". At the bottom, there are "Context-Sensitive Help Setting" options and a "Content Name" dropdown set to "3 months".

3)Creation of Dispatch/Tracking Object

1.Click on the gear icon and then select Setup.

2.Click on the object manager tab just beside the home tab.

3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.

4. On the Custom Object Definition page, create the object as follows:

5. Label: Dispatch/Tracking

6. PluralLabel:

Dispatches/Trackings

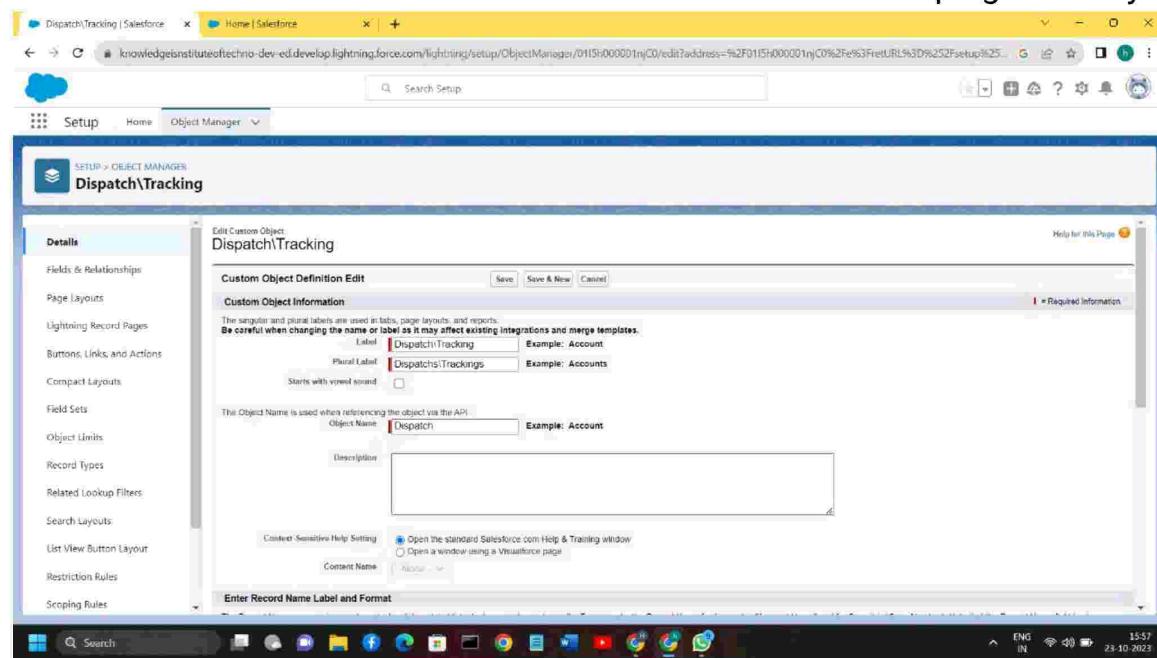
7. Record Name: dispatch Name

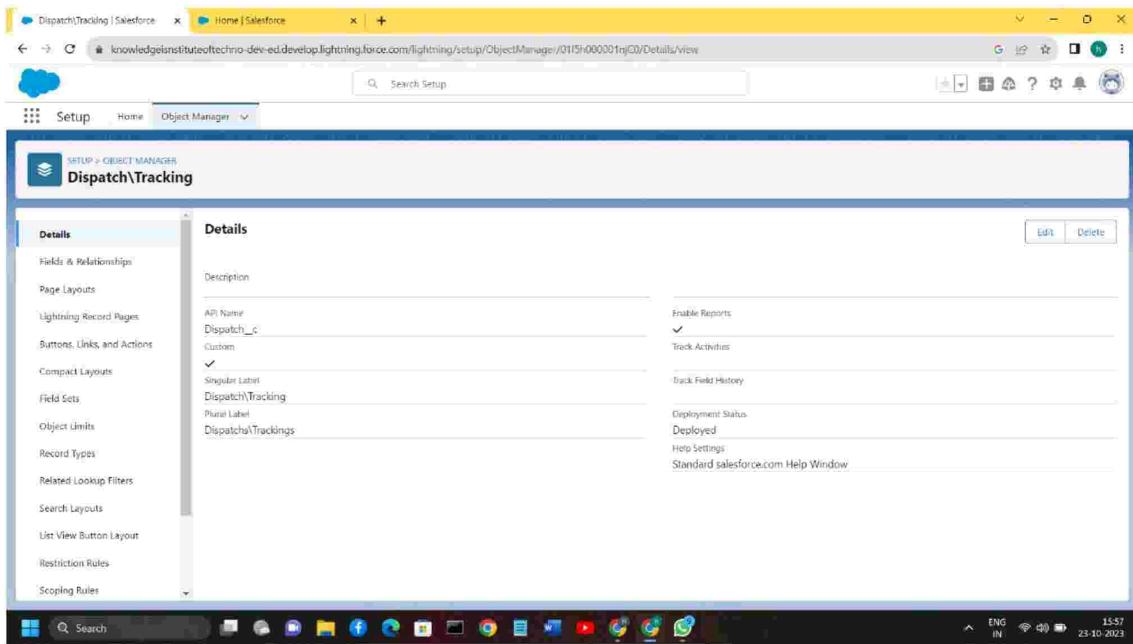
8. Select the data type as "Text".

9. Check the Allow Reports checkbox.

10. Check the Allow Search checkbox.

11. In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.





12.Click Save.

4)Creation of Dispatch/Delivery Object

- 1.Click on the gear icon and then select Setup.
- 2.Click on the object manager tab just beside the home tab.
- 3.After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
- 4.On the Custom Object Definition page, create the object as follows:
 - 5.Label: Dispatch/Delivery
 - 6.Plural Label: Dispatches/Deliveries
 - 7.Record Name: Dispatch/Delivery Number
 - 8.Select the data type as "Auto Number".
 - 9.Under display format enter "JP- {0000}"

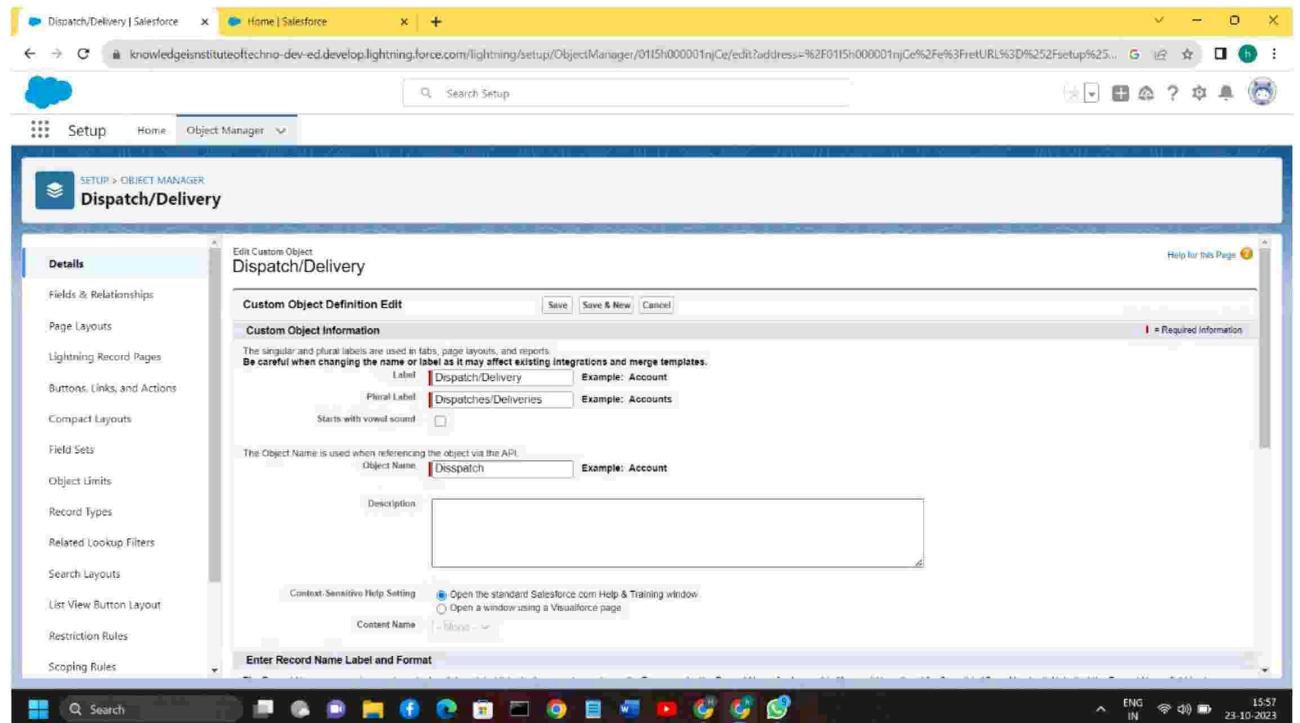
10. Enter starting number as 1

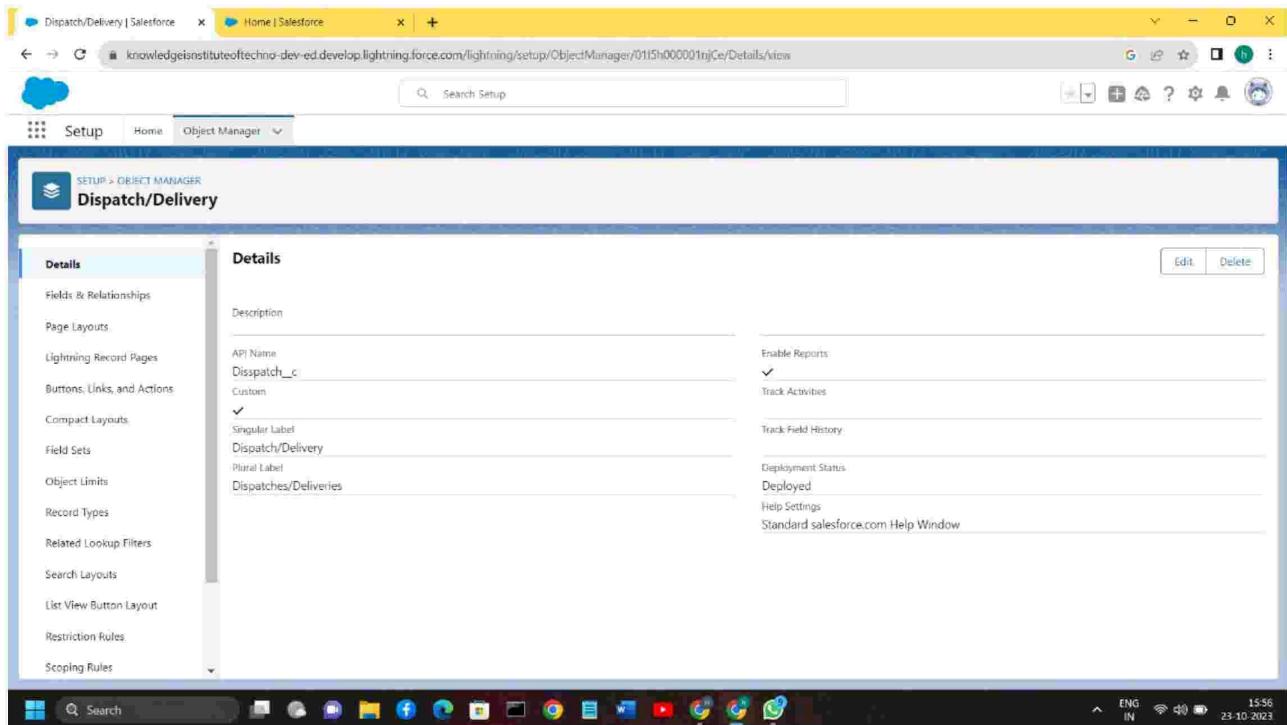
11. Check the Allow Reports checkbox.

12. Check the Allow Search checkbox.

13. In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.

14. Click Save.





Tabs:

Tabs in Salesforce help users view the information at a glance. It displays the data of objects and other web content in the application.

There are mainly 4 types of tabs:

- 1. Standard Object Tabs:** Standard object tabs display data related to standard objects.
- 2. Custom Object Tabs:** Custom object tabs display data related to custom objects. These tabs look and function just like standard tabs.
- 3. Web Tabs:** Web Tabs display any external Web-based application or Web page in a Salesforce tab.
- 4. Visualforce Tabs:** Visualforce Tabs display data from a Visualforce Page.

1) Creation of Tab Warehouse

1. Now create a custom tab.
2. Click on Home tab, enter Tabs in Quick Find and select Tabs.

Under custom object tabs, click New

3. For Object, select Warehouse.

4. For Tab Style, select any icon.

5. Leave all defaults as is. Click Next, Next, and Save.

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. In the 'Custom Object Tabs' section, a new tab for 'Warehouses' has been created, shown with a red 'Car' icon and the label 'Warehouses'. Other tabs listed are 'Dispatches\Tracking' and 'Sales_orders'. Below this, sections for 'Web Tabs', 'Visualforce Tabs', 'Lightning Component Tabs', and 'Lightning Page Tabs' are visible, each with a 'New' button and a 'What Is This?' link. The browser's address bar shows the URL: knowledgeinstituteoftechno-dev-ed.lightning.force.com/lightning/setup/CustomTabs/home. The system status bar at the bottom indicates 'ENG IN' and the date '23-10-2023'.

2) Creation of Sales order Tab

1. Now create a custom tab.

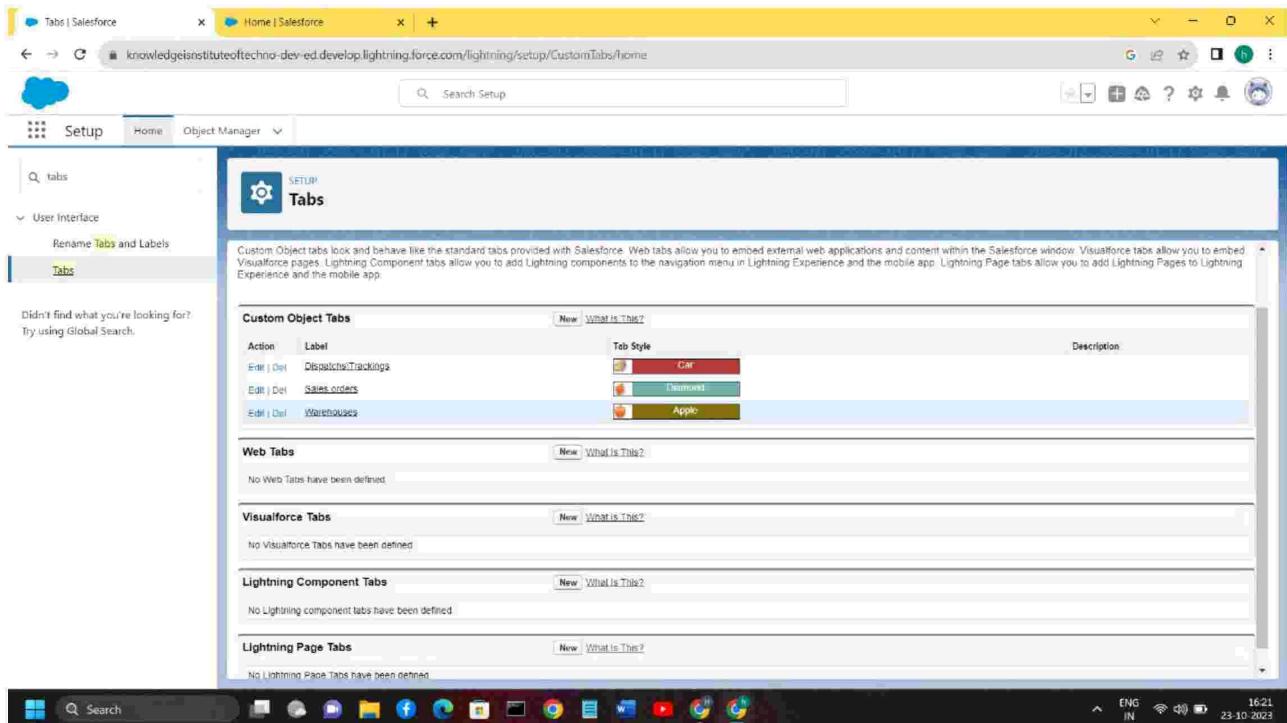
2. Click on Home tab, enter Tabs in Quick Find and select Tabs.

3. Under custom object tabs, click New.

4. For Object, select Sales order.

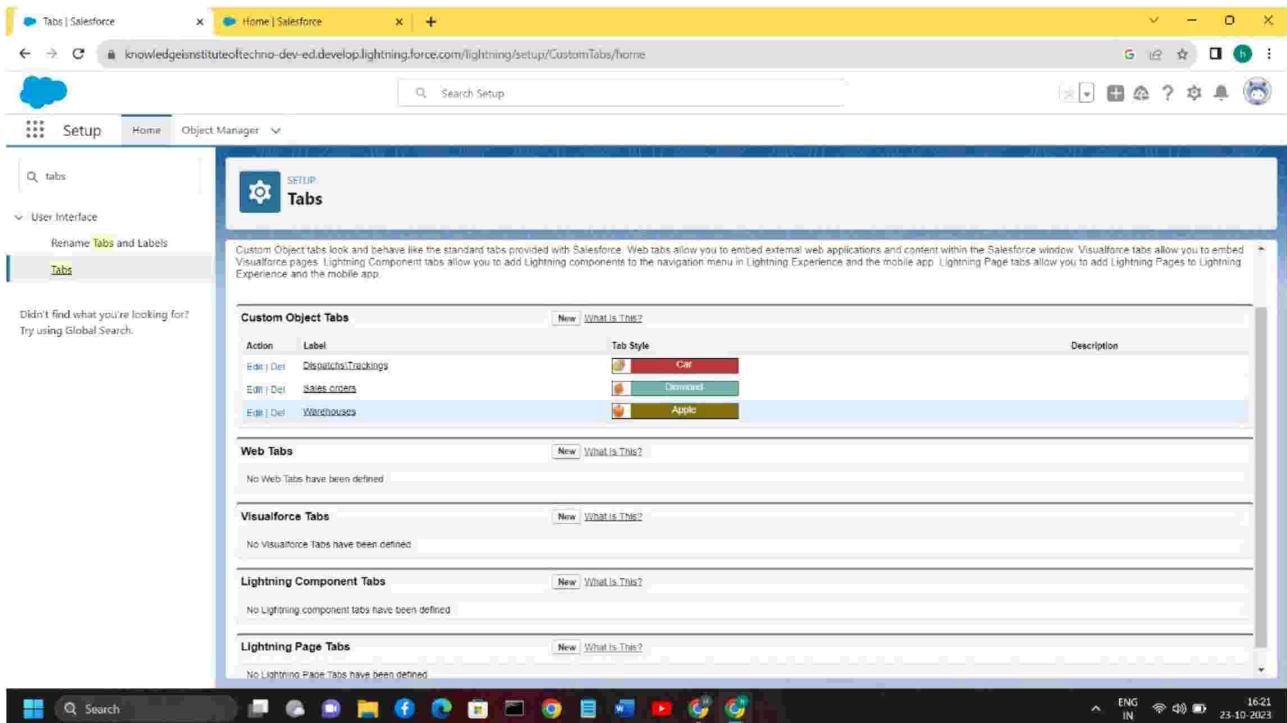
5. For Tab Style, select any icon.

6. Leave all defaults as is. Click Next, Next, and Save.



3) Creation of Dispatch/Tracking Tab

1. Now create a custom tab.
2. Click on Home tab, enter Tabs in Quick Find and select Tabs.
3. Under custom object tabs, click New.
4. For Object, select Dispatch/Tracking.
5. For Tab Style, select any icon.
6. Leave all defaults as is. Click Next, Next, and Save



Lightning App:

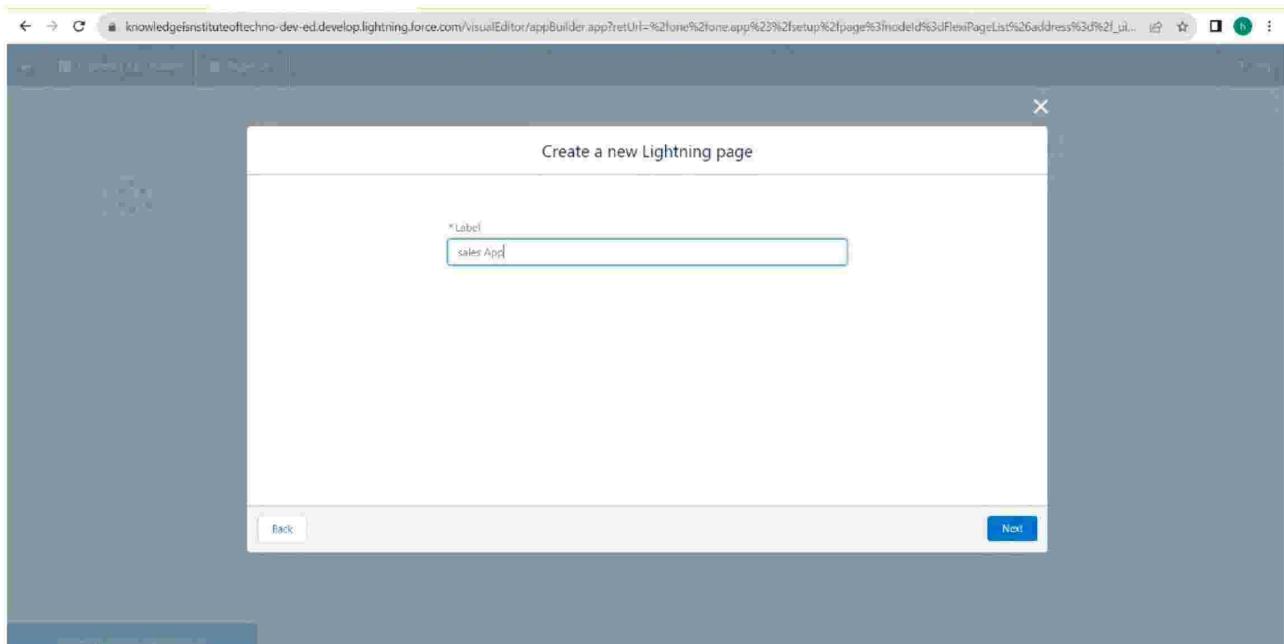
Apps in Salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo, and a particular set of tabs. The simplest app usually has just two tabs.

There are 2 types of Salesforce applications:

Standard apps: these apps come with every occurrence of Salesforce as default. Community, Call Centre, Content, Sales, Marketing, Salesforce Chatter, Site.com, and App Launcher are included in these apps. The description, logo, and label of a standard app cannot be altered.

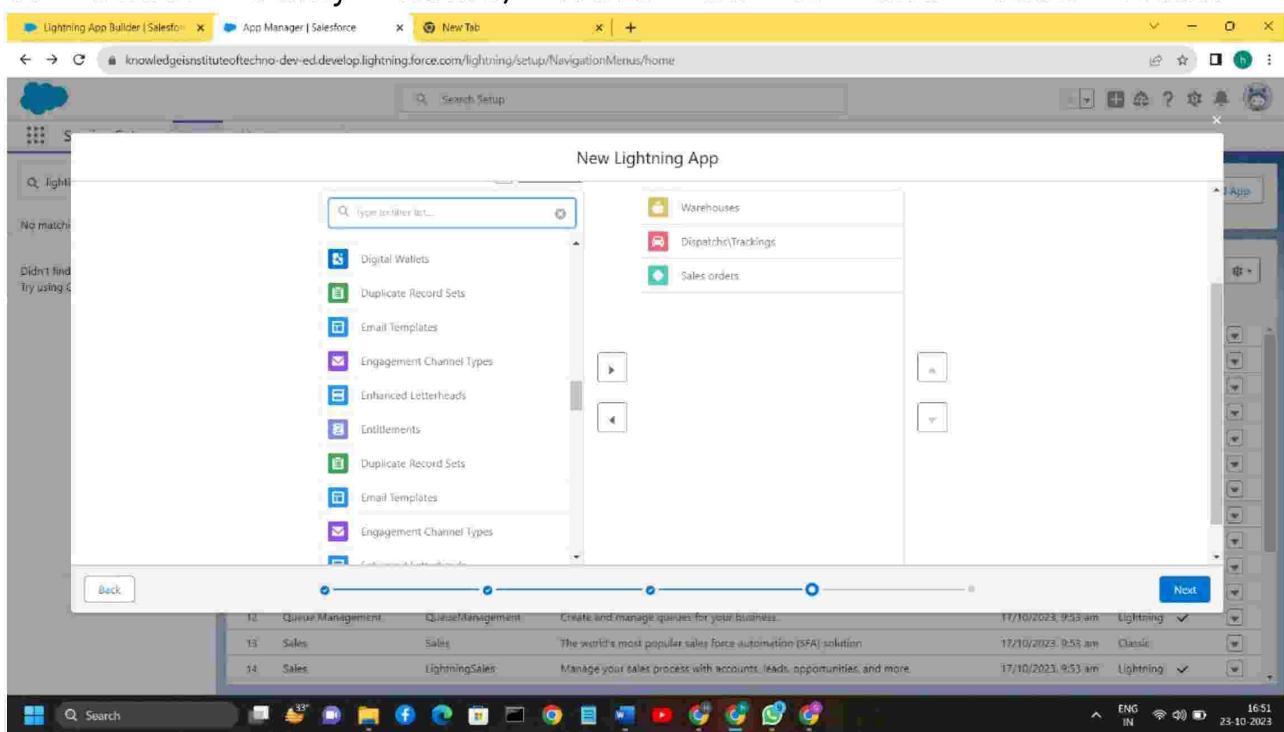
Custom apps: these apps are created according to the needs of a company. They can be made by putting custom and standard tabs together. Logos for custom apps can be changed.

1. Click New Lightning App. Job Application Tracking as the App Name, then click Next

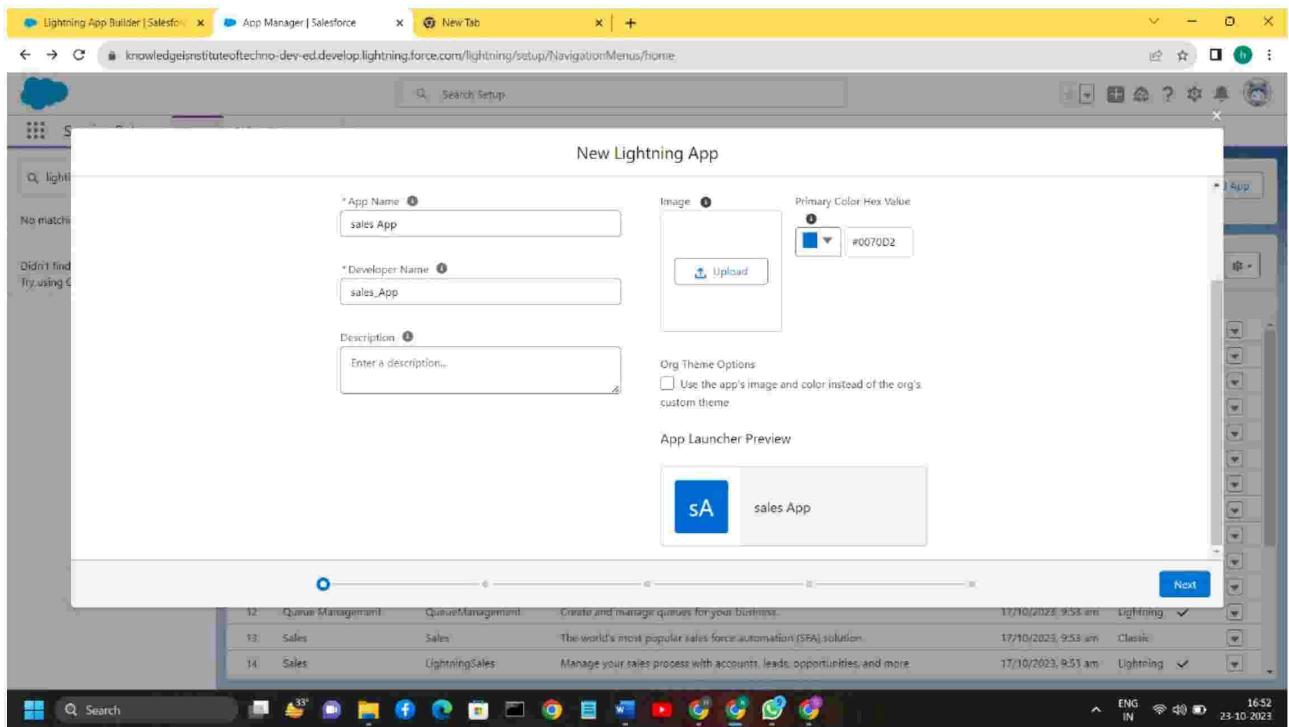


4. Under App Options, leave the default selections and click Next.

5. Under Utility Items, leave as is and click Next.



6. From Available Items, select Campaign, Leads, Accounts, Contacts, Opportunities, Products, Warehouse, Sales order, Dispatch/Tracking, Reports, and Dashboards and move them to Selected Items. Click Next.



7. From Available Profiles, select System Administrator and move it to

Selected Profiles. Click Save & Finish

Fields and Relationship:

Fields in Salesforce represent what the columns represent in relational databases. It can store data values which are required for a particular object in a record.

There are 2 types of fields in salesforce:

Standard fields: There are four standard fields in every custom object that are Created By, Last Modified By, Owner, and the field created at the time of the creation of an object. These fields cannot be deleted or edited and they are always required. For standard objects, the fields which are present by default in them and cannot be deleted from standard objects are standard fields.

Custom fields: The Custom fields which are added by the administrator/developer to meet the business requirements

of any organization. They may or may not be required.

1)Creation of Fields for The Dispatch/Tracking

1.click the gear icon and select Setup. This launches Setup in a new tab.

2.Click the Object Manager tab next to Home.

3.Select Dispatch/Tracking.

4.Select Fields & Relationships from the left navigation, and click New

5.Choose the data type as Text, click next

6.For Field Label, enter Tracking ID & length = 40

7.Next, Next and Click save.

8. Now let's create the other fields and we must choose the data types of the fields carefully. Let's have a look at it. Similarly create fields for Warehouse object- Address, Location select datatype according table. Similarly create fields for Dispatch/Delivery object- Dispatched, Expected date of delivery select datatype according table

9.Click Next, Next, then Save & New.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar has tabs for 'Lightning App Builder | Salesforce', 'Dispatch\Tracking | Salesforce', and 'New Tab'. Below the navigation is a search bar with 'Search Setup'. The main area is titled 'SETUP > OBJECT MANAGER' and shows 'Dispatch\Tracking'. On the left, a sidebar lists various setup categories like Page Layouts, Lightning Record Pages, and Field Sets. The central part of the screen is titled 'Fields & Relationships' and displays a table with the following data:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Dispatch Name	Name	Text(80)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		
Tracking ID	Tracking_ID_c	Text(40)		

The 'Tracking ID' row is highlighted with a yellow background. The bottom of the screen shows the Windows taskbar with various pinned icons and the system tray.

2)Creation of Fields for The Warehouse Objects

- 1.Select the Location as the Data Type, then click Next.
- 2.For Field Label as Address Click Next, Next, then Save & New
- 3.Select the Address as the Data Type, then click Next. For Field Label, Location Description.
- 4.Click Next, Next, then Save & New.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar has tabs for 'Lightning App Builder | Salesforce', 'Warehouse | Salesforce', 'New Tab', and '+'. The URL is 'knowledgeisinstiuteoftechno-dev-ed.lightning.force.com/lightning/setup/ObjectManager/0115h000001njjSS/FieldsAndRelationships/view'. The main header says 'Service Setup' and 'Object Manager'. Below that, it says 'SETUP > OBJECT MANAGER' and 'Warehouse'. On the left sidebar, under 'Fields & Relationships', there are links for 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, and Scoping Rules. The main content area is titled 'Fields & Relationships' and shows a table with 5 items, sorted by Field Label. The columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data in the table is:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Geolocation		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User Group)		✓
Warehouse Name	Name	Text(80)		✓

3)Creation of Dispatch/Delivery for Job Object

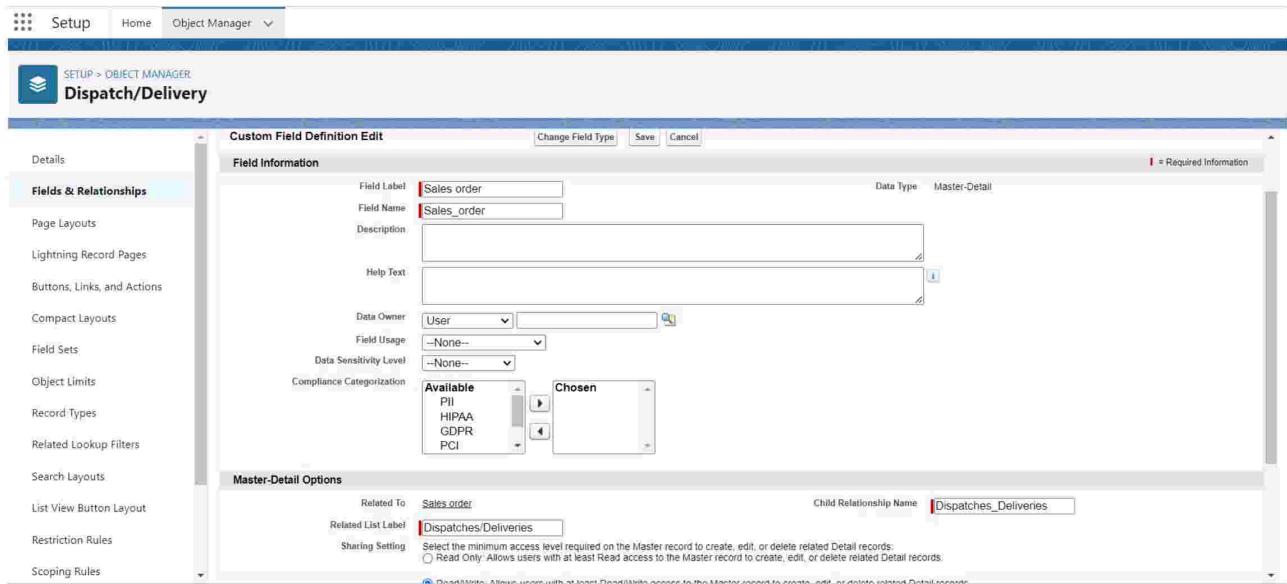
- 1.From Setup, go to Object Manager
- 2.On the sidebar, click Fields & Relationships.
- 3.Click New.
- 4.Choose Dispatch/Delivery and click Next
- 5.Choose the datatype as date and select the label name Expected date.
6. Click Next, Next, then Save

Fields & Relationships					
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Created By	CreatedBy	Lookup(User)		
Lightning Record Pages	Dispatch Name	Name	Text(80)	✓	▼
Buttons, Links, and Actions	Expected	Expected_c	Date		▼
Compact Layouts	Last Modified By	LastModifiedBy	Lookup(User)		
Field Sets	Sales order	Sales_order_c	Master-Detail(Sales order)	✓	▼
Object Limits					
Record Types					
Related Lookup Filters					
Search Layouts					
List View Button Layout					
Restriction Rules					
Scoping Rules					

4)Master detail relationship Dispatch /Delivery

Let's create a master-detail relationship on Dispatch/Delivery object.

1. Select Master-Detail Relationship as the Data Type and click Next.
2. For Related to, enter Sales order.
3. Click Next.
4. For Field Label, enter Sales order.
5. Click Next, Next, Next and Save.



5)Create Picklist Fields on Sales order

- 1.From Setup, click Object Manager and select Sales order.
- 2.Click Fields & Relationships, then New.
- 3.Select Picklist as the Data Type and click Next.
- 4.For Field Label enter Status
- 5.Select Enter values, with each value separated by a new line and enter these values:
Open, Hold, Shipped, Returned
- 6.Open, Hold, Shipped, Returned
- 7.Click Next, Next, then Save & New

The screenshot shows the 'Object Manager' interface in Salesforce. A custom field named 'Status' is being created. The 'Field Label' is set to 'Status'. The 'API Name' is 'Status'. The 'Default' value is 'Assigned dynamically'. The 'Modified By' field shows 'GIRIHRAN S.' and the date '19/10/2023, 3:53 pm'. The 'Field Name' is also 'Status'. The 'Description' and 'Help Text' fields are empty. A table below lists four picklist values: 'Open', 'Hold', 'Shipped', and 'Returned', each with its API name, default status, and modified by information.

Action	Values	API Name	Default	Modified By
<input type="checkbox"/>	Open	Open	Assigned dynamically	GIRIHRAN S., 19/10/2023, 3:53 pm
<input type="checkbox"/>	Hold	Hold	Assigned dynamically	GIRIHRAN S., 19/10/2023, 3:53 pm
<input type="checkbox"/>	Shipped	Shipped	Assigned dynamically	GIRIHRAN S., 19/10/2023, 3:53 pm
<input type="checkbox"/>	Returned	Returned	Assigned dynamically	GIRIHRAN S., 19/10/2023, 3:53 pm

This screenshot shows the 'Edit Sales order Custom Field Status' page. The 'Field Information' section includes the 'Field Label' (Status), 'Field Name' (Status), 'Data Type' (Picklist), 'Description' (empty), 'Help Text' (empty), 'Data Owner' (User), 'Field Usage' (None), 'Data Sensitivity Level' (None), and 'Compliance Categorization' (Available: PII, HIPAA, GDPR, PCI; Chosen: empty). The 'General Options' section includes 'Required' (unchecked), 'Default Value' (empty), and 'Show Formula Editor' (unchecked).

6)Lookup Relationship

1. Select look up Relationship as the Data Type and click Next.
2. For Related to, enter Account.
3. Click Next.
4. For Field Label, enter Customer.
5. Click Next, Next, Next and Save.

The screenshot shows the 'Object Manager' section of the Salesforce setup. A new relationship is being created between 'Sales order' and 'Customer'. The 'Field Label' is set to 'Customer' and the 'Field Name' is also 'Customer'. The 'Child Relationship Name' is 'Sales_orders'. Under 'Required', the 'Clear the value of this field' option is selected. The 'Lookup Filter' section is visible at the bottom.

6.Click lookup filter.

7.Provide filter as given below & also refer picture (Screenshot of Step Contact: Account ID equals Sales Order: Customer)

8.ClickNext,Next,NextandSave

The screenshot shows the 'Custom Field Definition Detail' page for the 'Customer' field. It displays the 'Field Information' and 'Lookup Options' sections. In the 'Field Information' section, the 'Field Label' is 'Contact', 'Field Name' is 'Contact', 'API Name' is 'Contact__c', and 'Data Type' is 'Lookup'. In the 'Lookup Options' section, the 'Related To' is 'Contact', 'Related List Label' is 'Sales orders', and 'Child Relationship Name' is 'Sales_orders'. The 'Lookup Filter' section shows a filter criteria: 'Filter Criteria' is 'Contacts: Account Name ID EQUALS Sales order: Customer ID', 'Filter Type' is 'Required', and 'Error Message' is 'The user-entered value must match filter criteria. Value does not exist or does not match filter criteria.' The 'Lookup Window Text' is 'Active'.

7)Create Field Dependency (On Candidate Object)

1.Create a dependency between these two picklists, so that when a state is selected, only respective Values are available.

2.The below steps will assist you in creating Field Dependencies.

3.Click on the gear icon and then select Setup.

- 4.Click on the object manager tab just beside the home tab.
- 5.After the above steps, Select Candidate Object
- 6.Now Select Fields and relationships from setup menu of the Candidate object.
- 7.Click Field Dependencies.
- 8.Click New.
- 9.Select State as the Controlling Field and select City as the Dependent Field.
- 10.Click Continue.
- 11.Select the appropriate Value in each column by double-clicking them. For Ex. Rajasthan - Jaipur
- 12.Click Include Values. And it is also same for UP, MP & Punjab with its city.
- 13.Click Preview, then test the dependency by selecting different State and viewing the associate Values available for Particular state.
- 14.Click Close to close the preview window.
- 15.Click Save.

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected for the 'Candidate' object. The 'Fields & Relationships' section is active. A table is displayed with the following data:

State	Rajasthan	UP	MP
City	Jaipur Jalandhar Lucknow Bhopal	Jaitpur Jalandhar Lucknow Bhopal	Jepur Jalandhar Locknow Bhopal

A legend indicates that green cells represent 'Included Value' and grey cells represent 'Excluded Value'. The 'Included Value' status is shown for all cells in the table.

8)Cross-Object Formula Field

Cross-object formula field- A cross-object formula field is basically a formula field. A cross-object formula can reference merge fields from a master ("parent") object if an object is on the detail side of a master-detail relationship. A cross-object formula works with Lookup relationships as well as in Master detail relationship. You can reference fields from objects that are up to 10 relationships away. Creation of cross object formula field

- 1.Select your object from object selection has Contact.
- 2.Select the option fields and relationships.
- 3.That will navigate to enter the details page where you give the field label.
4. Give the label name has Account Website
- 5.Select formula return type Text
- 6.In the formula field enter this formula Account. Website.
- 7.Click next you will navigate to field level security click on visible checkbox so that it is visible to all profiles.
- 8.Select the next option, select the page layout and save it.

The screenshot shows the Salesforce Setup interface for managing object fields. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar lists various configuration options under 'Contact' (e.g., Details, Fields & Relationships, Page Layouts). The main content area is titled 'Formula Options' for the 'Contact' object. It shows a 'Simple Formula' editor with the following input:
Selected Field Type: Contact
Formula Return Type: Text
Formula: Account Website (Text) = Account.Rebelite

4.USER & DATA SECURITY

User

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account. The user account

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

1)To Create A User

1.From Setup, enter Users in the Quick Find box, then select Users.

2.Click New User.

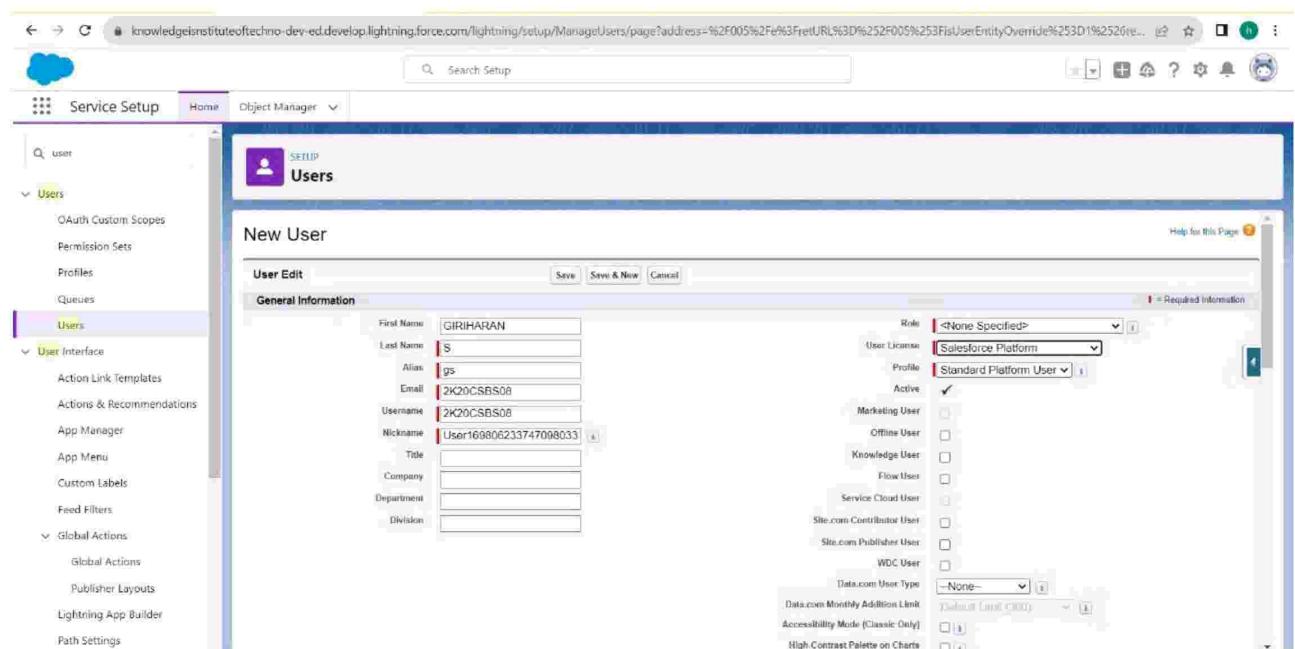
3.Enter First name as Giriharan and last name as S.

4.Enter the user's name and email address and a unique username in the form of an email address. By default, the username is the same as the email address.

5.Select user License as Salesforce Platform User.

7.Select profile (salesforce).

8.Click



Validation Rules

Validation rules verify that the data a user enters in a record meets the standards you specify before the user can save the record. As a CRM product owner they requested to create a

validation rule on account object on the phone field. 5.Then create a new role HR Manager.

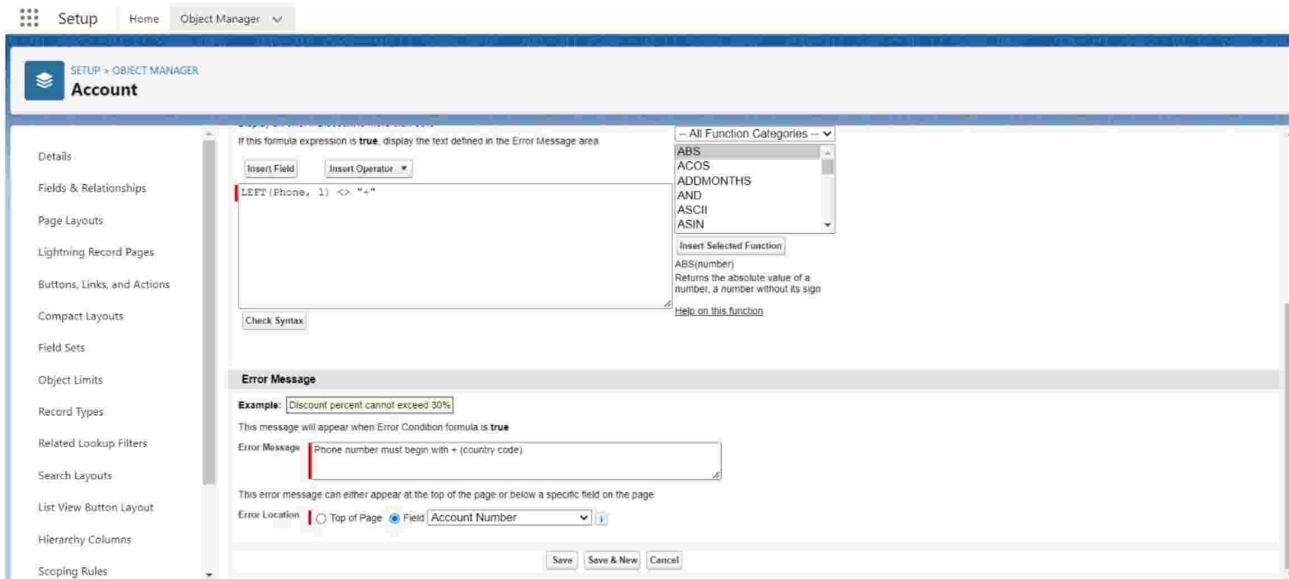
Creation Of Validation Rule

1. Navigate to object manager and select Account object.
2. In details section scroll down and find validation rule in it.
3. Click new, give the label name and in edit error conditional formula give the formula- LEFT(Phone, 1) <> "+" .
4. In error message give the description has Phone number must begin with + (country code).
5. In error location select field.

The screenshot shows the Salesforce Object Manager interface for the Account object. The left sidebar lists various configuration options like Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Hierarchy Columns, Scoping Rules, Triggers, Flow Triggers, and Validation Rules. The Validation Rules section is currently selected. The main content area displays a table titled 'Validation Rules' with one item listed:

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Phone_number_has_International_format	Account Number	Phone number must begin with + (country code).	✓	GIRI HARAN S, 20/10/2023, 12:55 pm

8. Click save



User Adoption

1.Create Record

2.View Record

3.Delete Record

1)Create Record

1.Click on App Launcher on left side of screen.

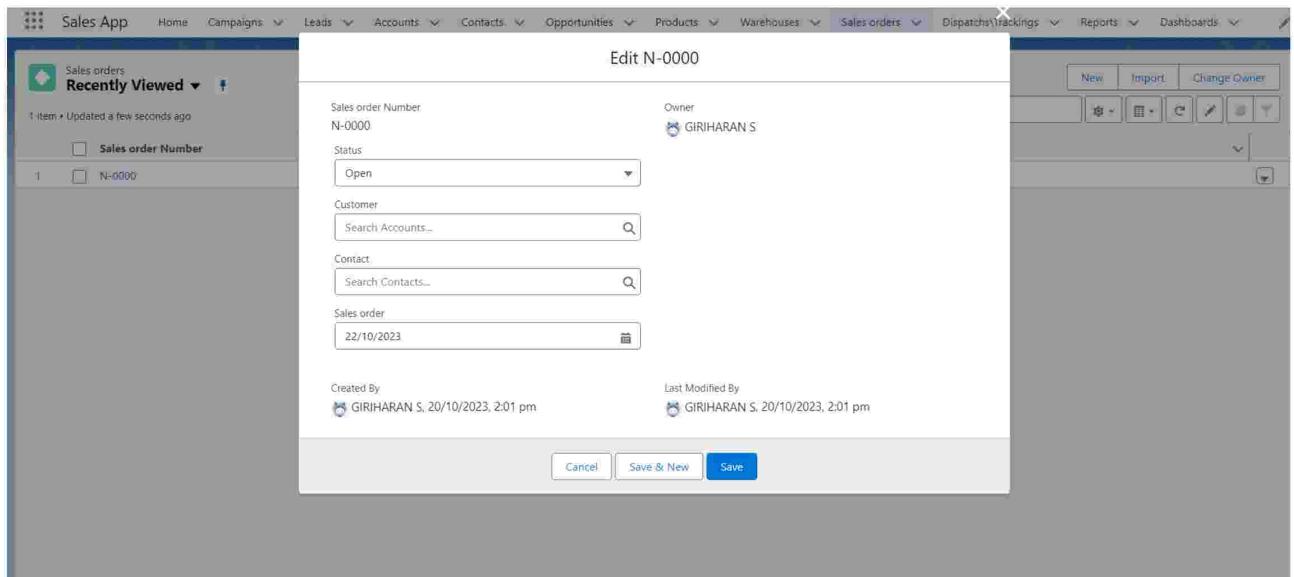
2.Search Sales App & click on it.

3.Click on Sales Order tab.

4.Click new button

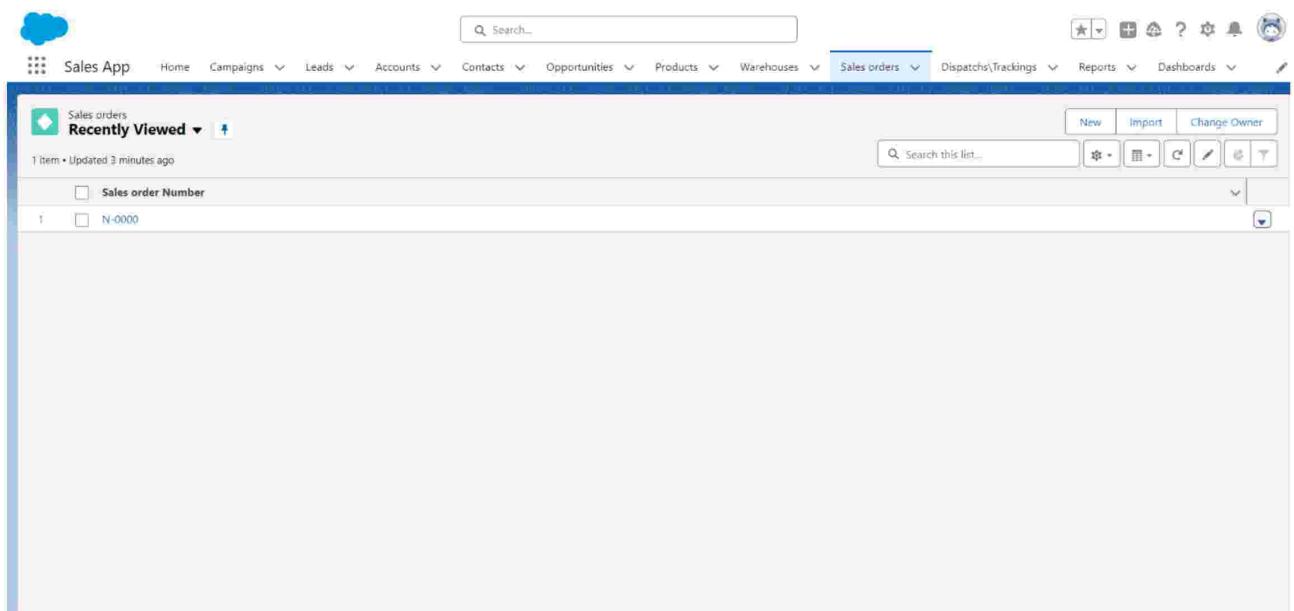
5.Fill all Sales Order record details.

6.Click on Save Button



2)View Record

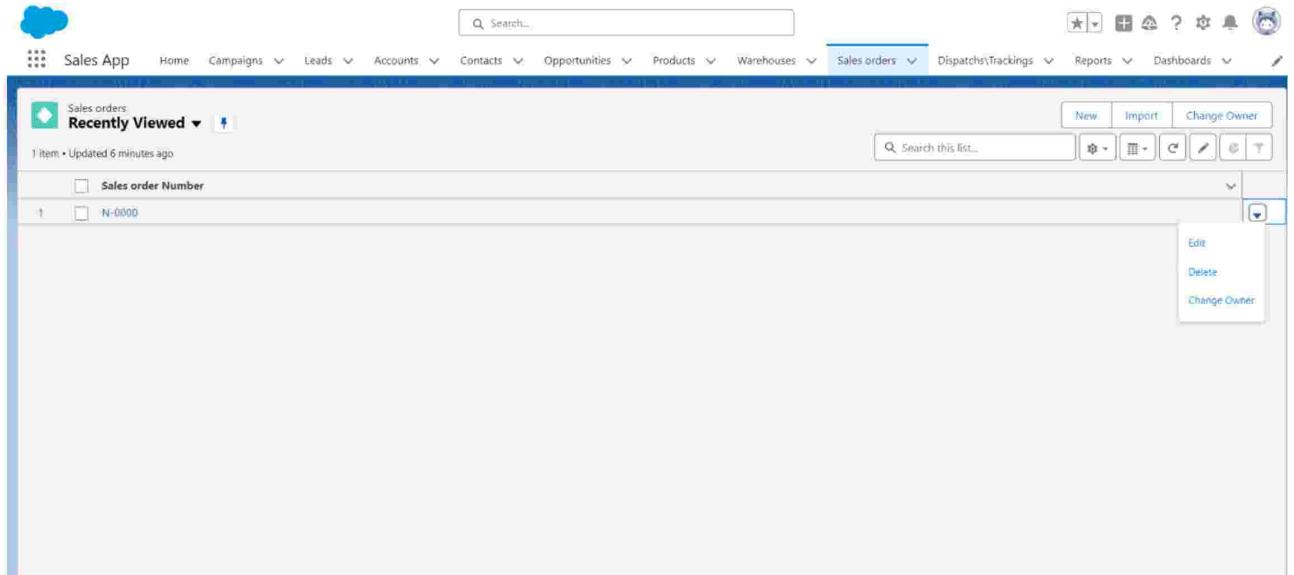
1. Click on App Launcher on left side of screen.
2. Search Sales App & click on it.
3. Click on Sales Order Tab.
4. Click on any record name. you can see the details of the Sales Order



Delete Record

1. Click on App Launcher on left side of screen.

2. Search Sales App & click on it.
3. Click on Sales Order Tab.
4. Click on Arrow at right hand side on that Particular record.
5. Click delete and delete again.



5.AUTOMATION

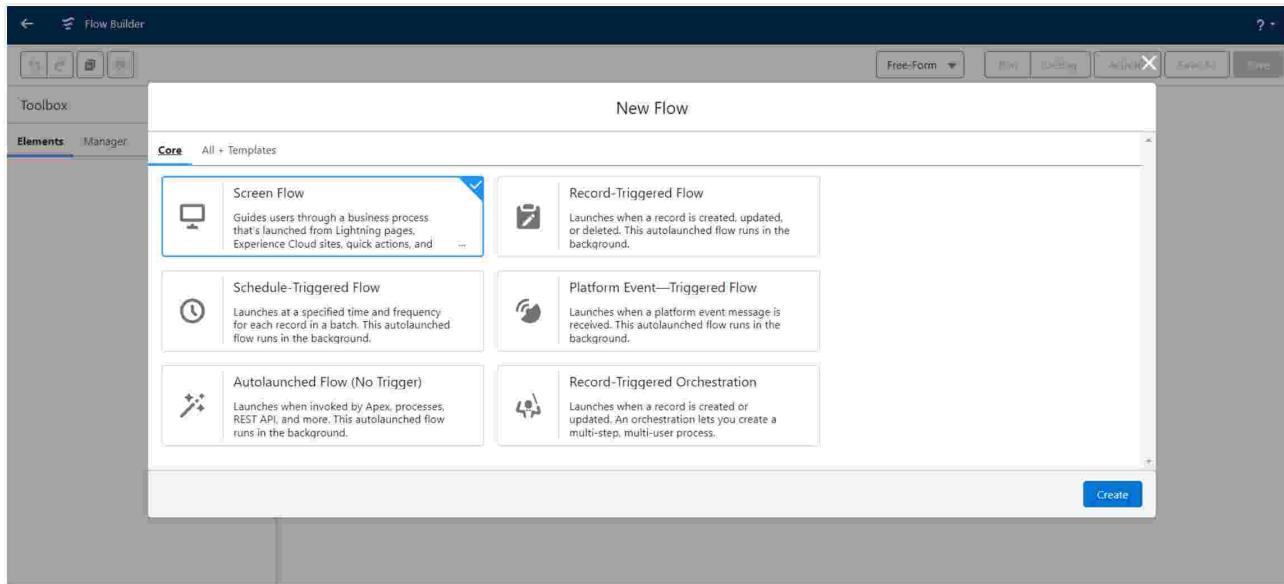
Flow:

Flows in Salesforce, a flow is a tool that automates complex business processes. Simply put, it collects data and then does something with that data. Flow Builder is the declarative interface used to build individual flows. Flow Builder can be used to build code-like logic without using a programming language. Flows fall into five categories:

- 1.Screen Flows
- 2.Schedule-Triggered Flows
- 3.Autolaunched Flows
- 4.Record-Triggered Flows
- 5.Platform Event-Triggered Flows

1)Create A Screen Flow

- 1.Click on Gear icon and select setup
- 2.In Quick find Box enter flow and select the flows
- 3.Click on New flow and Select Screen Flow .



4. Select resource type has variable.

5. Give api name as Recordid.

6. Select data type as Text.

5. At bottom for Availability outside the flow check box as Available for Input.

6. Click on done.

New Resource

* Resource Type
Variable

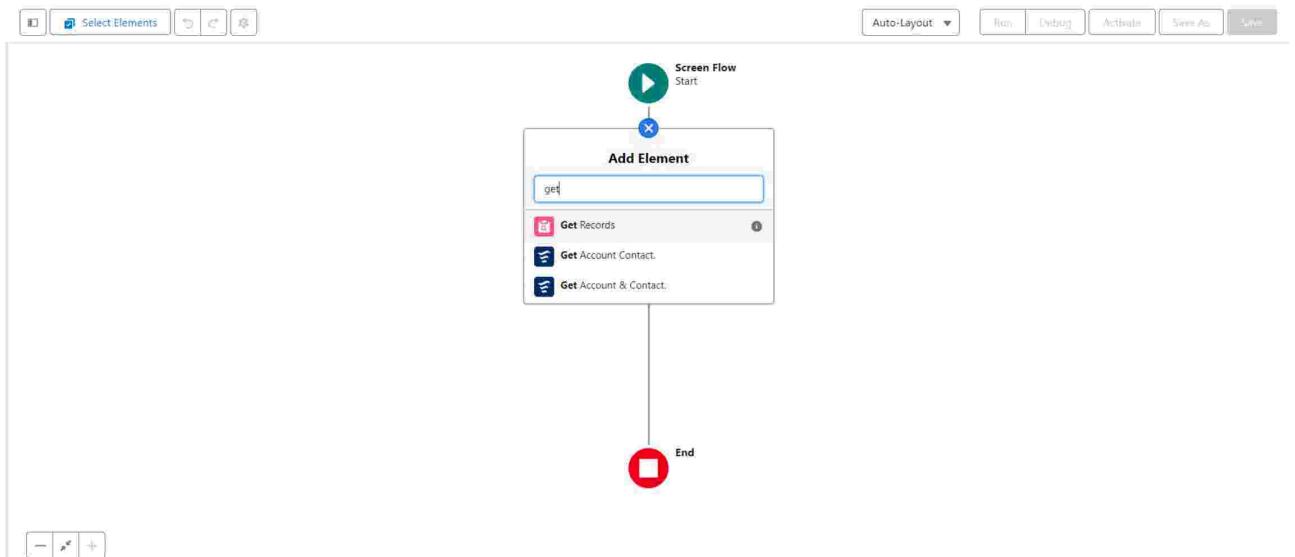
* API Name
Recordid

Description

* Data Type
Text Allow multiple values (collection) ?

Default Value
Enter value or search resources...

7. Now give the label name as Get Account Record



8. For Get record of object choose object as - Account

9. For Filter account records condition requirements are - All conditions are met

10. Field- Account id Operator- equals Value-Recordid
(variable which we had created)

11. For how many records to share - Only the first record

12.How to store record data- Automatically stores all fields.

13.Click on done.

The screenshot shows the 'Store Record Data' configuration screen. At the top, there's a field labeled 'Object' with 'Account' selected. Below that is a section titled 'Filter Account Records' with a dropdown set to 'All Conditions Are Met (AND)'. A condition is defined with 'Field' as 'Id', 'Operator' as 'Equals', and 'Value' as 'Aa Recordid'. There's a button to '+ Add Condition'. Under 'Sort Account Records', the 'Sort Order' is set to 'Not Sorted', with a note: '⚠️ If you store only the first record, filter by a unique field, such as ID.' In the bottom section, 'How Many Records to Store' has 'Only the first record' selected. 'How to Store Record Data' also has 'Automatically store all fields' selected. Both sections have radio buttons for 'Only the first record' and 'All records'.

* Object

Account

Filter Account Records

Condition Requirements

All Conditions Are Met (AND)

Field Operator Value

Id Equals Aa Recordid

+ Add Condition

Sort Account Records

Sort Order

Not Sorted

⚠️ If you store only the first record, filter by a unique field, such as ID.

How Many Records to Store

Only the first record

All records

How to Store Record Data

Automatically store all fields

Choose fields and let Salesforce do the rest

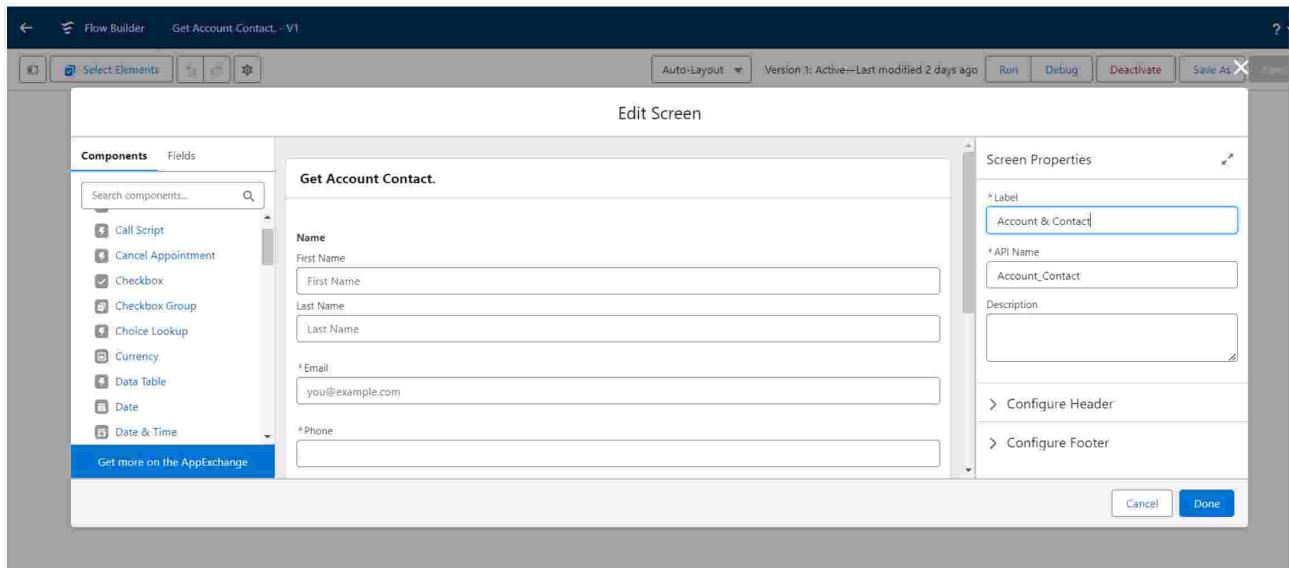
Choose fields and assign variables (advanced)

14.Now again add the element below the Get account record and select Screen as your element

15.Give the label name as Get Account & Contact.

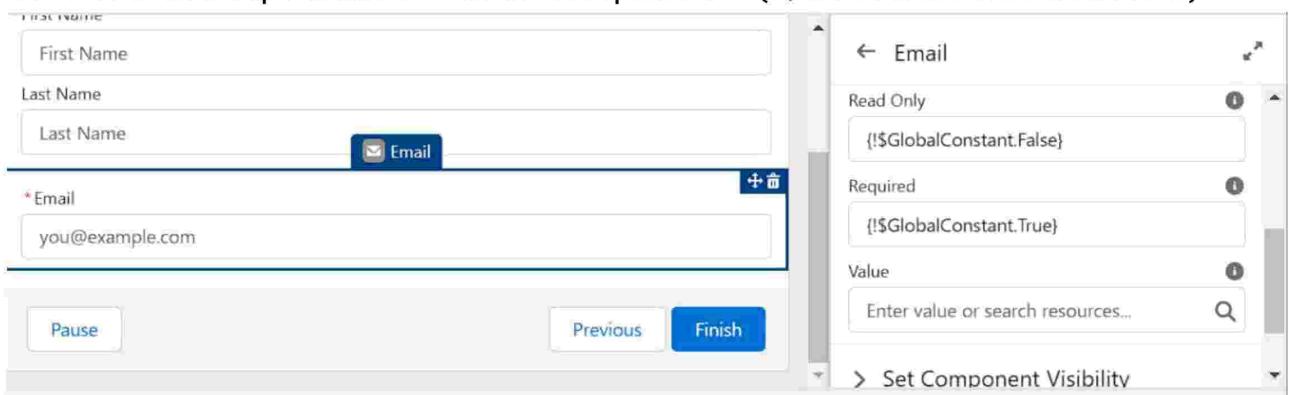
16.Left side in the component section search for Name and drag it to the screen

17. Give the api name as Name



18. Now drag Email from component section and move it to the screen.

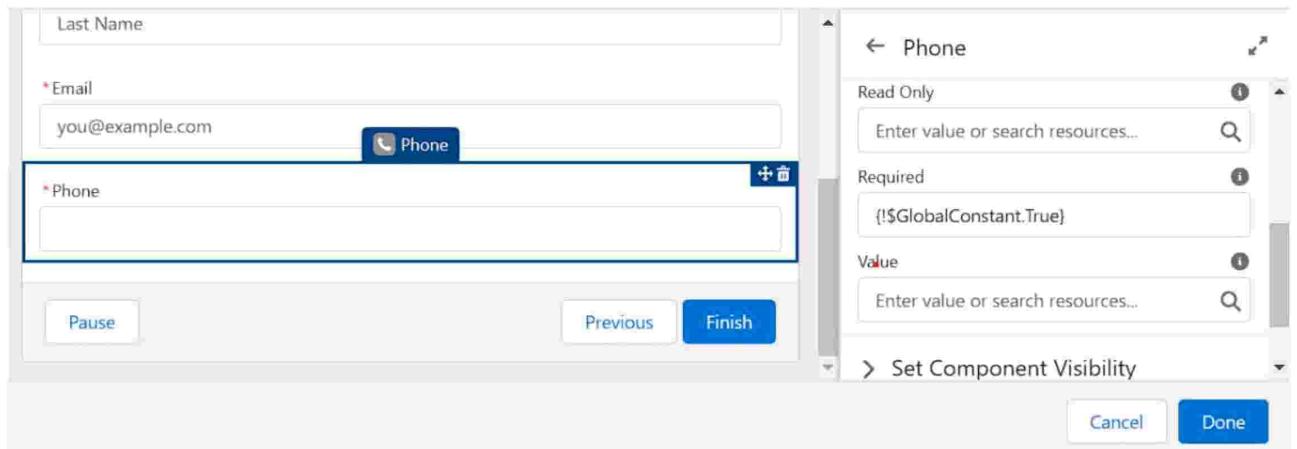
19. Give the Api name- Email Required - {\$GlobalConstant.True}



20. Now drag the Phone from component to screen below the email

21. Give the Api name as - Phone Required- {\$GlobalConstant.True}

New Screen



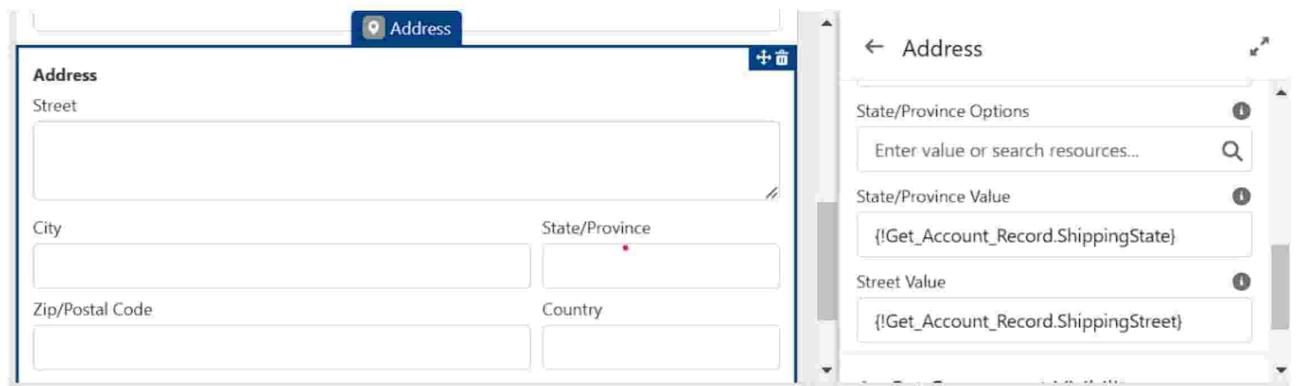
22. Now Drag Address from component section to screen .

23. Give the Api name as -Address City
Value-{!Get_Account_Record.ShippingCity}

Country
Value-{!Get_Account_Record.BillingCountry}

Postalcode-{!Get_Account_Record.ShippingPostalcode}

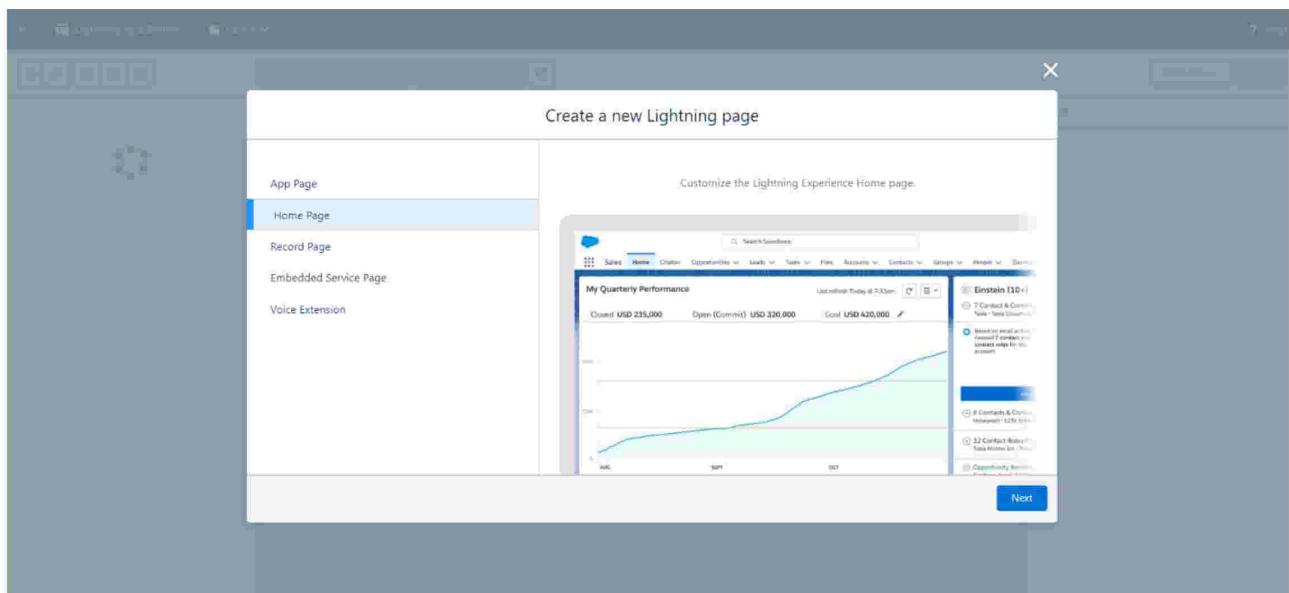
State/province
value-{!Get_Account_Record.ShippingStreet}



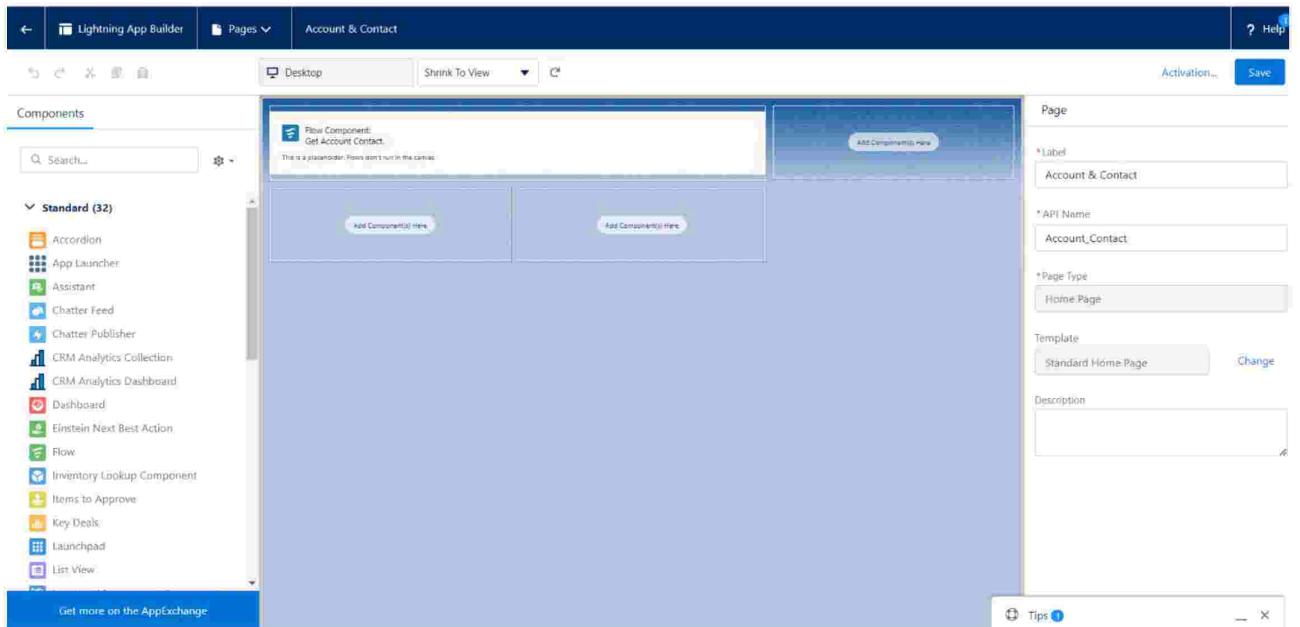
24. Click on done and save it. Give the label name as Get Account & Contact.

To Create Lightning Home Page

1. Click on setup gear.
2. Now search for lightning App builder.
3. And select New option



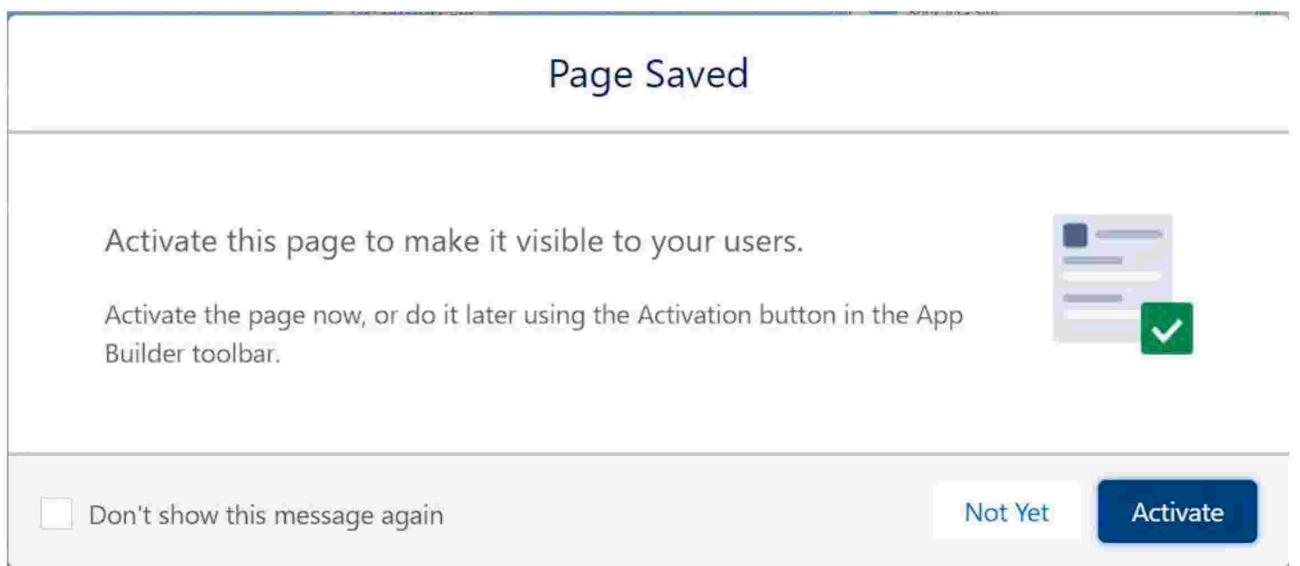
4. In create a new lightning page select Home page.
5. Select Next
6. Give the label name - Account & Contact
7. Choose a standard home page.
8. Now in the component section select flow and drag down it to Corner of the page



9. At the right side select the flow Get Account & Contact.

10. At the right side top of the page click on Save.

11. You will get the populate notification and click on activate.



12. you will get an activation pop up select App and profile.

13. Select Sales app in lightning app selection.

14. In profiles select System administrator, Standard user, Standard platform user.

15. Save it.

Profiles (48)		3 Selected
Profile	Description	
<input type="checkbox"/> Smartbridge Help center Profile		
<input type="checkbox"/> Solution Manager		
<input checked="" type="checkbox"/> Standard Platform User		
<input checked="" type="checkbox"/> Standard User		
<input checked="" type="checkbox"/> System Administrator		
<input type="checkbox"/> Work.com Only User		

16. Now click on app launcher and search for Sales App

17. At the right side corner you can find a Pencil icon to personalize navigation click on that.

18. Click on add more items and in available items click on all and search for home.

19. Move the home page to top and click on save.

Personalize your nav bar for this app. Reorder items, and rename or remove items you've added.
[Learn More](#) 

 1 item added to your list. Save your updates.

NAVIGATION ITEMS (24) [Add More Items](#)

 Home	X
 Accounts	
 Campaigns	
 Contacts	
 . . .	

[Reset Navigation to Default](#) 

[Cancel](#) [Save](#)

Apex Trigger

Apex triggers-Apex can be invoked by using triggers. Apex triggers enable you to perform custom actions before or after changes to Salesforce records, such as insertions, updates, or deletions.

A trigger is Apex code that executes before or after the following types of operations:

- 1.insert
- 2.update
- 3.delete
- 4.merge
- 5.upsert
- 6.undelete

Create An Apex Trigger

Use Case- when we try to create the account with the same name i.e. Preventing the users to create Duplicate Accounts.

- 1.Click on setup gear
- 2.Below the setup gear you can find developer console click on that
- 3.click on file and select new and select Apex trigger.

Copy this code

```
trigger PreventDuplicateAccounts on Account (before insert) {  
    Set<String> accountNames = new Set<String>();  
    for (Account acc : Trigger.new) {  
        if (accountNames.contains(acc.Name)) {  
            acc.addError('A duplicate account with this name  
already exists.');//  
        } else {  
            accountNames.add(acc.Name);  
        }  
    }  
}
```

```

        accountNames.add(acc.Name);

    }

}

}

```

The screenshot shows the Salesforce IDE interface with the file 'PreventDuplicateAccounts.apxt' open. The code is a trigger for the 'Account' object:

```

trigger PreventDuplicateAccounts on Account (before insert) {
    Set<String> accountNames = new Set<String>();
    for (Account acc : Trigger.new) {
        if (accountNames.contains(acc.Name)) {
            acc.addError('A duplicate account with this name already exists.');
        } else {
            accountNames.add(acc.Name);
        }
    }
}

```

6.REPORTS & DASHBOARD

Reports

A report is a list of records that meet the criteria you define. It's displayed in rows and columns, and can be filtered, grouped, or displayed in a graphical chart. Every report is stored in a folder. Folders can be public, hidden, or shared, and can be set to read-only or read/write.

1)Create A Report

1.Create a report that displays rating of the account and which has type and account name.

2.Click on app launcher search for reports.

3. Click the report type as Sales order with customer Click Start report.

4. Customize your report, in group rows select - Customer Account Name

5. Click refresh

6. Click save and run

7. Give report name – New Sales orders with Customer Report

8. Click Save

The screenshot shows the Zoho Sales App report builder. At the top, there's a navigation bar with links for Home, Campaigns, Leads, Accounts, Contacts, Opportunities, Products, Warehouses, Sales orders, Dispatches\Trackings, Reports, and Dashboards. Below the navigation is a search bar and a toolbar with icons for Add Chart, Save & Run, Save, Close, and Run. The main area is titled 'REPORT' and shows the report name 'New Sales orders with Customer Report'. Under 'Fields', there are sections for 'Groups' and 'Columns'. In the 'Groups' section, 'Customer: Account Name' is selected under 'GROUP ROWS'. In the 'Columns' section, 'Sales order: Sales order Number' is selected. A message at the top right says 'Previewing a limited number of records. Run the report to see everything.' It also shows 'Customer: Account Name' and 'Sales order: Sales order Number' as filter options. A note below says 'No records returned. Try editing report filters.' with options to 'Show All sales orders.' or 'Edit other filters in the filter panel.'

Dashboard

Dashboards provide more insights than reports as they combine the data from many reports and show a summarized result. Looking at many reports at a time gives the flexibility of combining the results from them quickly. Also, summaries in dashboards help us decide on action plans quicker. The dashboards can contain charts, graphs and Tabular data.

1) Create A Dashboard

1. Click on Dashboards tab from the "Sales App" application.

2.Click on new dashboard

3.Give name- Sales App Dashboard

4.Click create

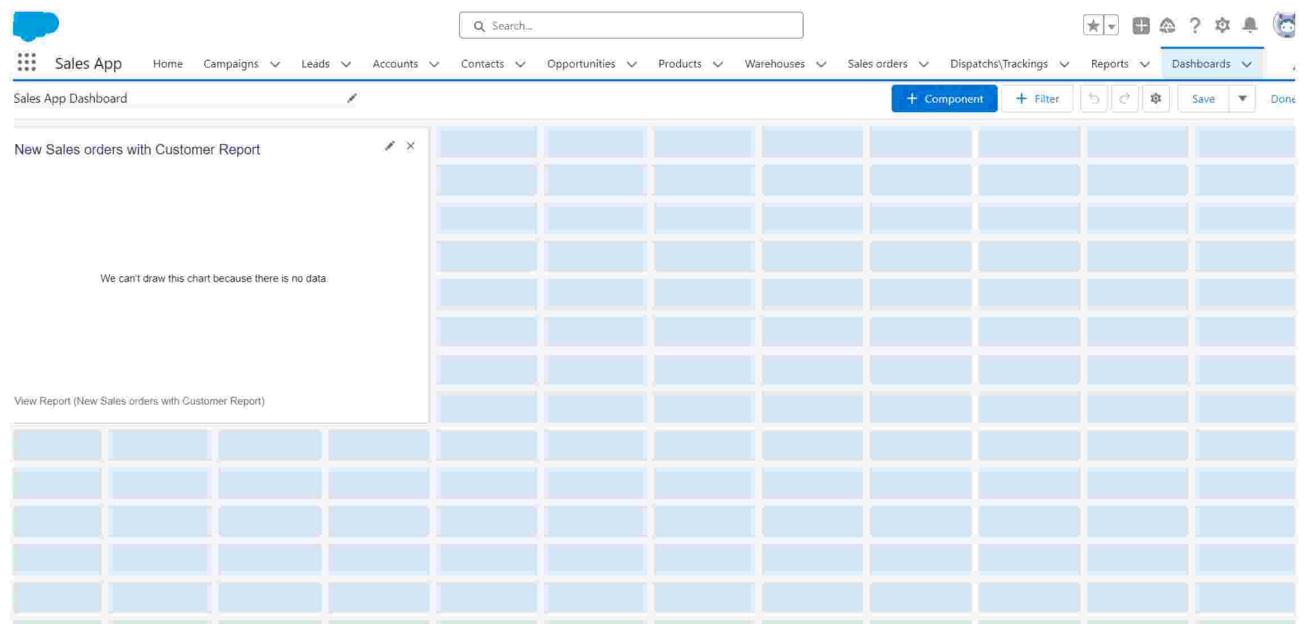
5.Give your dashboard a name and click on +component.

6.Select the New Sales orders with Customer Report which you created.

7.For the data visualization select any of the chart, table etc as your wish.

8.Click add

9.Click save



GitHub & Project Video Demo Link :

GitHub Link :

<https://github.com/Sowmiya2716/Retail-Management-Application-Using-Salesforce.git>

Project Video Link :

https://drive.google.com/file/d/1T-QHPBrUOQD-h0e8gJ_b3bjeczdu5C9s/view?usp=drive_link