

Project Report Template

RETAIL MANAGEMENT APPLICATION USING SALESFORCE

1.Introduction

1.1 Overview

- ❖ First, we had finished empathy map and ideation and brainstorming and submit it on GitHub.
- ❖ We had created account in salesforce. then we create objects, tabs, application, field, validation rules, user and reports, dashboard.
- ❖ **Object creation**
We Click on the gear icon and Click on the object manager tab and Find a Create Dropdown click on that and select Custom Object.
- ❖ **Application creation**
We enter App Manager in the quick Find and select App Manager and Under app options, we leave the default selections and click next and Under Utility Items, we leave as is and click next and from Available Items, select Account , contacts, opportunities, leads, warehouse, dispatch tracking, campaign and move them to selected Items and we click next and from available Profiles, we select System Administrator and move it to selected profiles and we click save & finish.
- ❖ **Field creation**
We click the object manager tab next to select the dispatch/tracking and select fields & relationships from the left navigation, and click new and then select the data type and click new, new, and save. same procedure to we created the other fields expected data of delivery, tracking id, sales order, dispatched.
- ❖ **User creation**
We enter user in quick find box and select to continue to give the details.
- ❖ **Validation rules**
We click on object manager tab next to select the account object and in details select on the validation rules and click on new, give the label name and enter the formula and save it. Create the cross object.
- ❖ **Reports creation**
From the reports tab, we click new report and select the report type attendees with events for the report, and we click create and we include all fields, then save or run it.

❖ *Dashboard creation*

From the Dashboard tab, we click New Dashboard and select the products and stock availability report and select the create and add components, select the type of chart and click on add and save the dashboard.

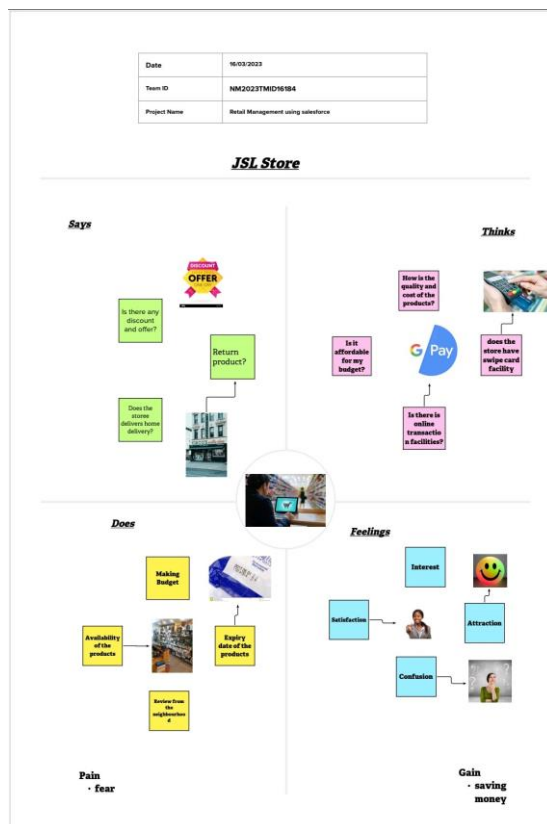
1.2 Purpose

- ❖ Salesforce helps businesses keep track of customer interactions and sales data. It can manage leads, contacts, opportunities, and cases.
- ❖ Salesforce can be used to manage orders from retail stores and distributors, including tracking orders, processing payments, and managing inventory levels.
- ❖ ***Increase Skills Used in Entrepreneurship***

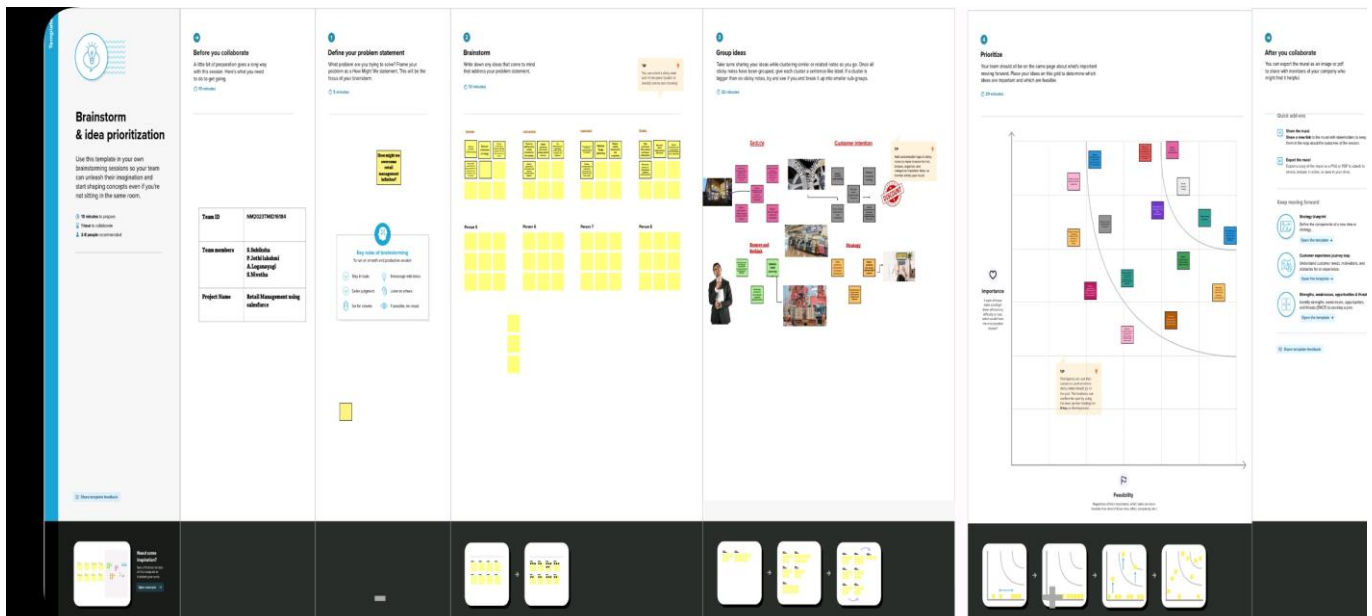
If you're interested in becoming an entrepreneur in the future, sales and marketing are likely to be two key pieces of your business. Knowing the different applications and uses Salesforce can have within your business can help you propel your company to success!

2. Problem definition & design thinking

2.1 Empathy map



2.2 Ideation & Brainstorming



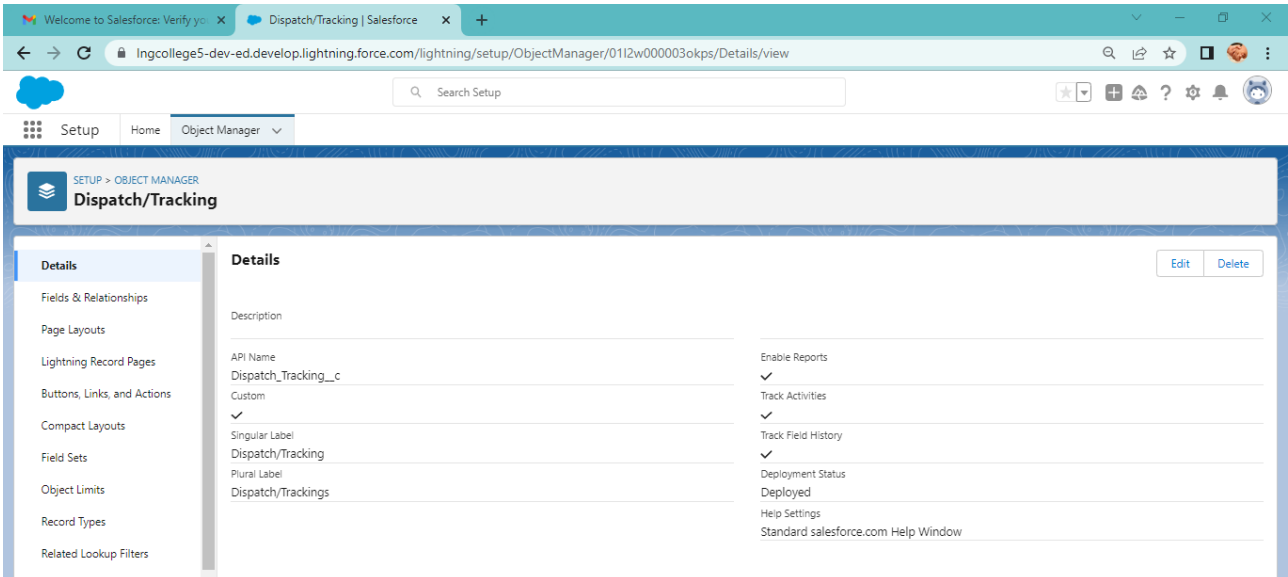
3.Result

3.1 Data Model:

Object name	Field in the object	
Dispatch / Tracking	Field label	Data type
	Dispatched	Check box
	Expected date of delivery	Date
	Tracking id	Auto number
Warehouse	Field label	Data type
	Product name	Text
	Warehouse name	Text
	Stock availability	number
Master-details	Field label	Data type
	Sales order	Master-detail relationships

3.2 Activity and screenshot

◆ OBJECT CREATION

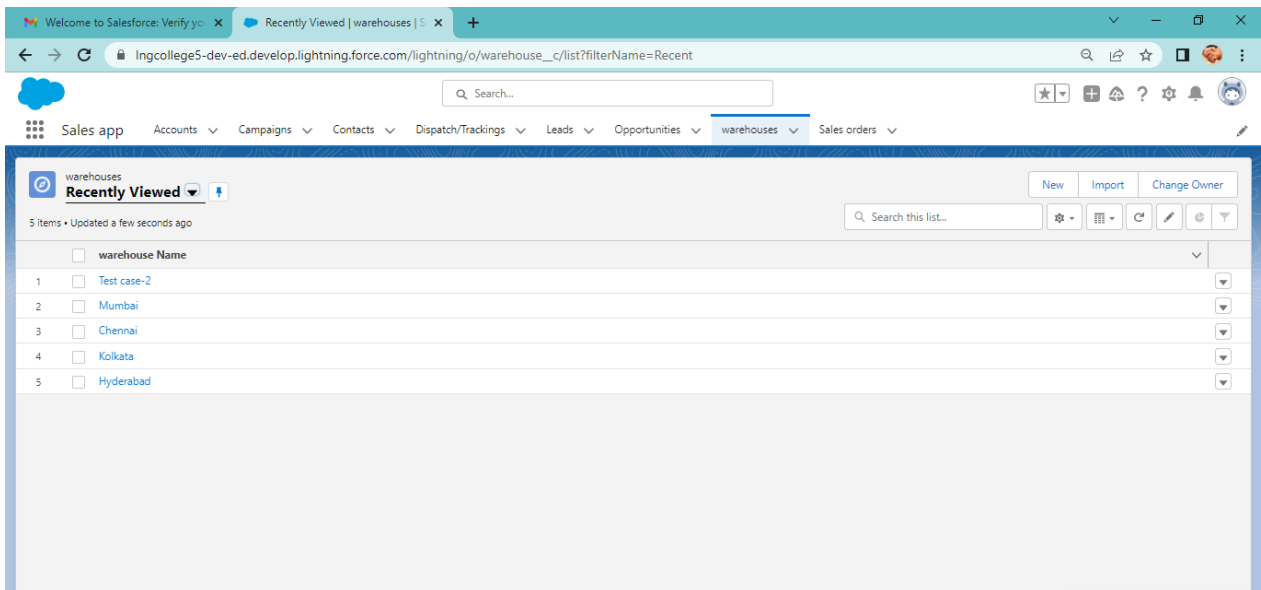


The screenshot shows the Salesforce Object Manager setup page for the 'Dispatch/Tracking' object. The browser address bar indicates the URL: `ingcollege5-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003okps/Details/view`. The page title is 'Dispatch/Tracking'. The left sidebar contains a 'Details' section with a list of configuration options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Details' and contains a form with the following fields:

- Description: (empty)
- API Name: Dispatch_Tracking__c
- Custom: ☒
- Singular Label: Dispatch/Tracking
- Plural Label: Dispatch/Trackings
- Enable Reports: ☒
- Track Activities: ☒
- Track Field History: ☒
- Deployment Status: Deployed
- Help Settings: Standard salesforce.com Help Window

Buttons for 'Edit' and 'Delete' are located in the top right corner of the form.

◆ APPLICATION



The screenshot shows the Salesforce application page for the 'warehouses' object. The browser address bar indicates the URL: `ingcollege5-dev-ed.develop.lightning.force.com/lightning/o/warehouse__c/list?filterName=Recent`. The page title is 'warehouses'. The left sidebar contains a 'Sales app' section with a list of navigation items: Accounts, Campaigns, Contacts, Dispatch/Trackings, Leads, Opportunities, warehouses, and Sales orders. The main content area is titled 'warehouses' and contains a 'Recently Viewed' section. The 'Recently Viewed' section shows a list of 5 items, updated a few seconds ago. The list is filtered by 'warehouse Name' and contains the following items:

	warehouse Name	
1	<input type="checkbox"/> Test case-2	
2	<input type="checkbox"/> Mumbai	
3	<input type="checkbox"/> Chennai	
4	<input type="checkbox"/> Kolkata	
5	<input type="checkbox"/> Hyderabad	

Buttons for 'New', 'Import', and 'Change Owner' are located in the top right corner of the list. A search bar is also present in the top right corner of the list.

◆ FILED CREATION

The screenshot shows the Salesforce Lightning Setup interface for the 'Dispatch/Tracking' object. The left sidebar contains navigation links: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Fields & Relationships' and shows a table of 6 items, sorted by Field Label. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Dispatched	Dispatched__c	Checkbox		
Expected date of Delivery	Expected_date_of_Delivery__c	Date		
Last Modified By	LastModifiedById	Lookup(User)		
sales order	sales_order__c	Master-Detail(sales order)		✓
Tracking ID	Name	Auto Number		✓

◆ USER CREATION

The screenshot displays the Salesforce Lightning Setup interface for user management. The sidebar on the left contains a search bar and a list of navigation items: Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and User Interface. The 'Users' item is selected and highlighted. The main content area is titled 'All Users' and includes a sub-header 'On this page you can create, view, and manage users.' Below this, there is a 'View:' dropdown set to 'All Users' and a link to 'Create New User'. A table lists the current users, with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table contains four entries: Chatter_Eveget, S_Subiksha, User_Integration, and User_Security. Each entry has an 'Edit' link and a checkmark in the 'Active' column. At the bottom of the table, there are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'. A alphabetical navigation bar is located at the bottom right of the table.

Action	Full Name ↑	Alias	Username	Role	Active	Profile
Edit	Chatter_Eveget	Chatter	chathv00g2w00000r4coeaj_ebsoscul4fr4@chatter.salesforce.com		✓	Chatter Free User
Edit	S_Subiksha	SS	sublikshasusest@tppco.com		✓	System Administrator
Edit	User_Integration	intep	integration@00g2w00000r4coeaj.com		✓	Analytics Cloud Integration User
Edit	User_Security	ssq	insightsssecurity@00g2w00000r4coeaj.com		✓	Analytics Cloud Security User

◆ VALIDATION RULES

The screenshot shows the Salesforce Setup interface for the 'Account' object. The left sidebar lists various setup options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Validation Rules' and shows 1 item, sorted by Rule Name. The table below lists the validation rule.

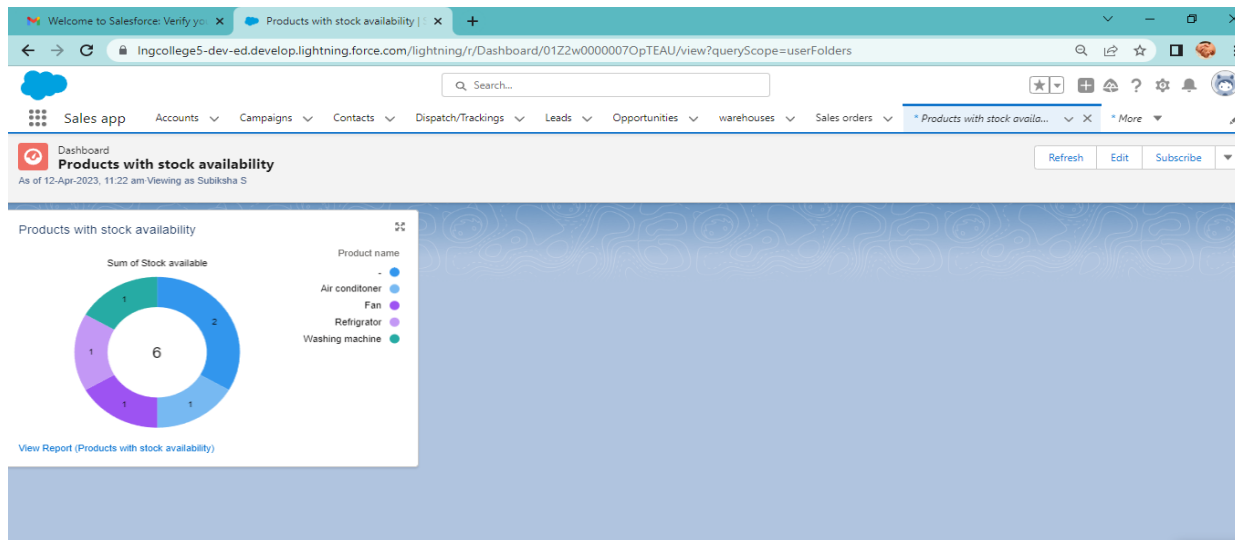
RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
phone_number_has_international_format	Phone	Phone number must begin with +(country code)	✓	Subiksha S, 02/04/2023, 8:19 am

◆ REPORT CREATION

The screenshot shows a Salesforce report titled 'Products with stock availability'. The report displays a table with columns for Product name, warehouse: warehouse Name, and Stock available. The table shows 5 records and a total stock available of 6. The report is filtered by 'Products with stock available'.

Product name	warehouse: warehouse Name	Stock available
- (1)	Test case-2	2
Subtotal		2
Air conditioner (1)	Hyderabad	1
Subtotal		1
Fan (1)	Kolkata	1
Subtotal		1
Refrigerator (1)	Chennai	1
Subtotal		1
Washing machine (1)	Mumbai	1
Subtotal		1
Total (5)		6

◆ DASHBOARD



4.Trailhead profile public URL

Team Leader - <https://trailblazer.me/id/subi07>

Team member 1 - <https://trailblazer.me/id/nive54>

Team member 2 - <https://trailblazer.me/id/logaa4>

Team member 3 - <https://trailblazer.me/id/jothp2>

5.Advantages and disadvantages

Advantage of Retailers	Disadvantage of Retailers
<ul style="list-style-type: none"> ➤ Requires less capital ➤ More profit margin than wholesales ➤ Better customer relation ➤ Credit facility ➤ No liability towards the buyers 	<ul style="list-style-type: none"> ➤ Require more marketing costs ➤ Good selling skills is required ➤ High competition ➤ No benefit of bulk buying

6.Applications

- ❖ Salesforce provides users comprehensive tools to manage customer data, automate processes, analyze data and insights, and create personalized customer experiences. Salesforce also offers a variety of solutions for customer service, marketing automation, commerce, app development, and more.
- ❖ Salesforce can be used to manage orders from retail stores and distributors, including tracking orders, processing payments, and managing inventory levels. This can help field sales teams ensure that orders are fulfilled quickly and accurately and that inventory levels are maintained at optimal levels.

7.Conclusion

- ❖ Salesforce helps businesses keep track of customer interactions and sales data. It can manage leads, contacts, opportunities, and cases. Salesforce also offers several features to help businesses automate their sales and marketing processes, such as email marketing, lead capture, and lead scoring.
- ❖ Retail management refers to the process of helping customers find products in your store. It includes everything from increasing your customer pool to how products are presented, and how you fulfill a customer's needs. A good store manager helps customers leave the store with a smile.

8.Future scope

- ❖ The future of Salesforce looks bright as the demand for Salesforce professionals continues to grow. With the increasing adoption of cloud technology and the growth of customer relationship management (CRM) systems, there will be a growing need for Salesforce expertise in the coming years.