A CRM APPLICATION ON E-COMMERCE ACTIVITIES

NAAN MUDHALVAN PROJECT REPORT

Submitted by

NAVEENA.R	**(620120104069)**
PAVITHRA.K	**(620120104073)**
SIVAPRIYA.B	**(620120104092)**
TAMILVANI.S	**(620120104104)**

In partially fulfillment for the award of the degree

of

BACHELOR OF ENGINEERING

in

COMPUTER SCIENCE AND ENGINEERING

AVS ENGINEERING COLLEGE, SALEM -636 003

ANNA UNIVERSITY : CHENNAI -600 025

BONAFIDE CERTIFICATE

Certified that this project report titled **"CRM APPLICATION OF E-COMMERCE ACTIVITIES"** is the Bonafide work of **"NAVEENA R (620120104069), PAVITHRA K (620120104073), SIVAPRIYA B (620120104092), TAMILVANI S (620120104104)"** who carried out the project work under my supervision.

SIGNATURE

Prof. S. DHAMODARAN M.E.,

ASSISTANT PROFESSOR

FACULTY MENTOR

Department of CSE,
AVS Engineering College, Salem-
636003.

SIGNATURE

Dr.R.VISHWANATHAN M.E., Ph.D.,

ASSISTANT PROFESSOR

SPOC FACULTY

Department of CSE,
AVS Engineering College, Salem-
636003.

SPOC

HEAD OF THE DEPARTMENT

ACKNOWLEDGEMENT

I thank my god for providing me with everything that I required in completing this project successfully.

My most sincere salutations go to ANNA UNIVERSITY that gave me an opportunity to have sound base of Computer Science and Engineering.

I acknowledge with deep sense of gratitude to our Chairman Shri.K.KAILASAM, secretary Mr.K.RAJAVINAYAKAM M.B.A., and our Correspondent Mr.K.SENTHIL KUMAR B.Tech., for providing all the necessary facilities to do this project.

I thank our Vice Principal’s **Dr.R.VISHWANATHAN M.E., Ph.D.,** and **Dr.D.R.JOSHUA M.E., Ph.D.,** for his timely advice and encouragement.

I offer my sincere thanks to **Dr.M.VILASHINI M.E., Ph.D.,** Dean and **Prof .V.MEENA M.E.,** Head of The Department, for giving his constant support and motivation.

I am indebted to my guide **Prof. S. DHAMODARAN M.E.,** Assistant professor for my constant guidance and encouragement throughout the project work. I Also express my thanks to all faculty members and friends for their support towards the successful; completion of the project.

TABLE OF CONTENTS

LIST OF FIGURES

LIST OF ABBREVIATION

CRM	Customer Relationship Management
UI	User Interface
UX	User Experience
OWD	Org – Wide Default
CSV	Comma – Separated Values
API	Application Programming Interface

CHAPTER – 1 PROJECT SPECIFICATION

1.1 Project Goal

The goal of developing a CRM application for E-commerce activities is to create a comprehensive system that helps businesses effectively manage their customer relationships, sales, and marketing efforts within the context of E-commerce. Centralize customer data, including contact information, purchase history, and communication preferences. Segment customers based on various criteria for targeted marketing and personalized interactions. Provide a 360-degree view of each customer to improve engagement and customer service.

Integrate with E-commerce platforms to manage orders, inventory, and product catalogs. Streamline order processing and fulfilment. Ensure accurate product availability information. Integrate with various data sources, including E-commerce platforms, payment gateways, and third-party applications. Ensure real-time data synchronization to keep information up to date. Enable mobile access to the CRM for users on the go.

The ultimate goal of a CRM application for E-commerce activities is to improve customer relationships, drive sales growth, and enhance the overall E-commerce experience for both customers and the business itself. The CRM project should contribute to cost savings, increased sales, and improved customer satisfaction, resulting in a positive return on investment.

1.2 Project Scope

The scope of a CRM application for E-commerce activities can be quite extensive, as it involves managing various aspects of customer interactions, sales, marketing, and service within the context of an E-commerce business. Design and execute marketing campaigns, including email marketing, social media marketing, and content marketing. Integrate with E-commerce platforms to manage orders, inventory levels, and product catalogs. Monitor order status and shipping information. Provide real-time product availability information to customers. Integrate with E-commerce platforms, payment gateways, accounting systems, and third-party applications.

Design the system to scale as the business grows. Accommodate an increasing number of customers, products, and transactions. Provide training and documentation for users to effectively use the CRM. Encourage user adoption through user-friendly interfaces. Collect feedback from users to identify areas for improvement. Regularly update and enhance the CRM based on user input and evolving business needs.

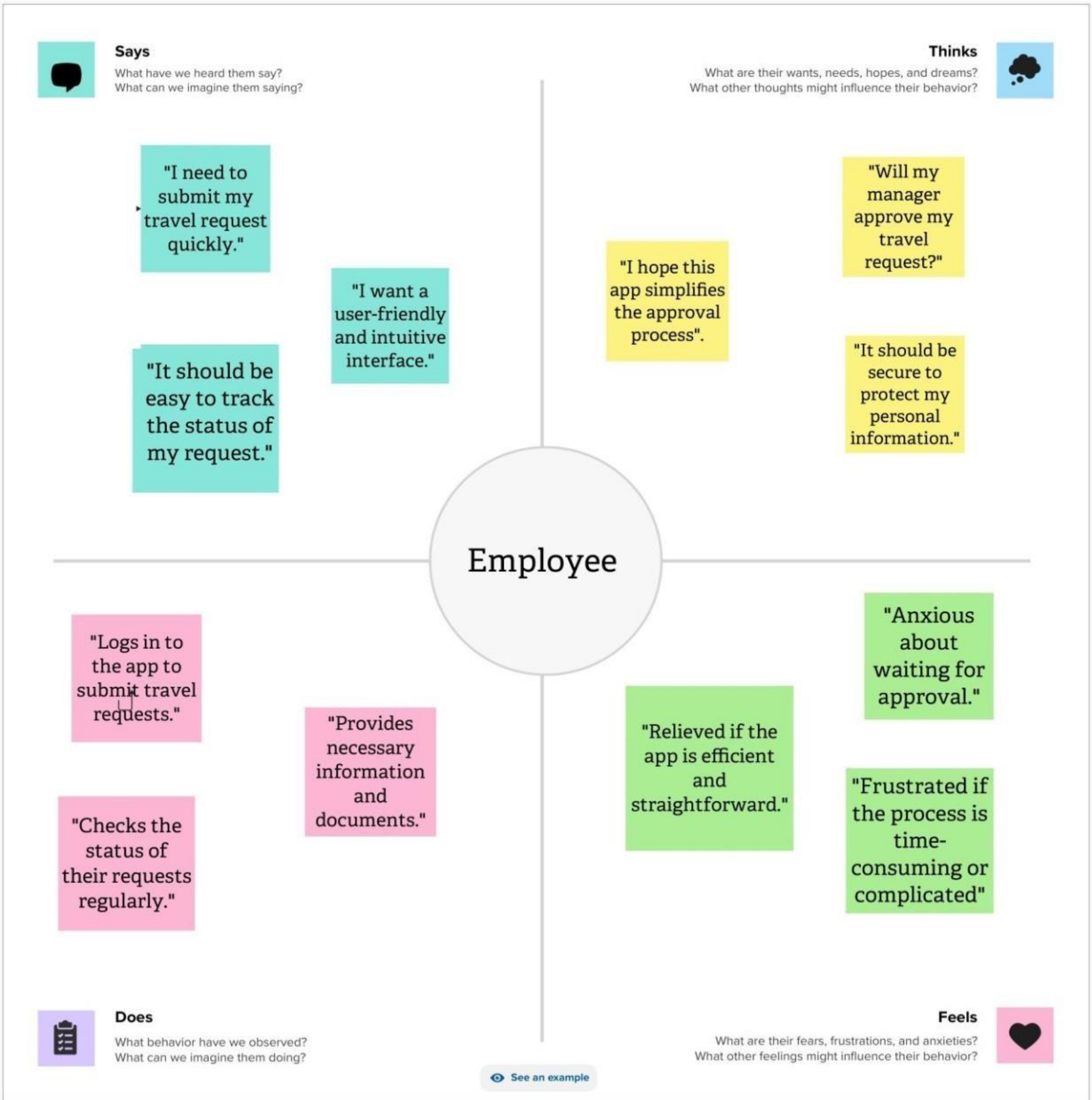
The scope of a CRM application for E-commerce activities should be well-defined, but it can evolve as the business grows and adapts to changing customer needs and market dynamics. A well-planned and executed CRM project can lead to improved customer relationships, increased sales, and enhanced customer satisfaction in the E-commerce sector.

1.3 Problem Statement Definition

Problem Statement (PS)	**I am**	**I'm trying to**	**But**	**Because**	**Which make me feel**
PS	Employee	I am trying to streamline and simplify the process of submitting, and providing e-commerce requests to ensure a smoother activities experience	But the current process is manual, timeconsuming, and lacks transparency , resulting in delays and confusion.	Because this inefficiency in the product delivery process creates frustration, adds unnecessary administrative work, and can lead to financial discrepancies	Which makes me feel frustrated, anxious about e-commerce plans, and often uncertain about the status of my request, ultimately affecting my overall job satisfaction and productivity

1.4 Empathy Map Canvas

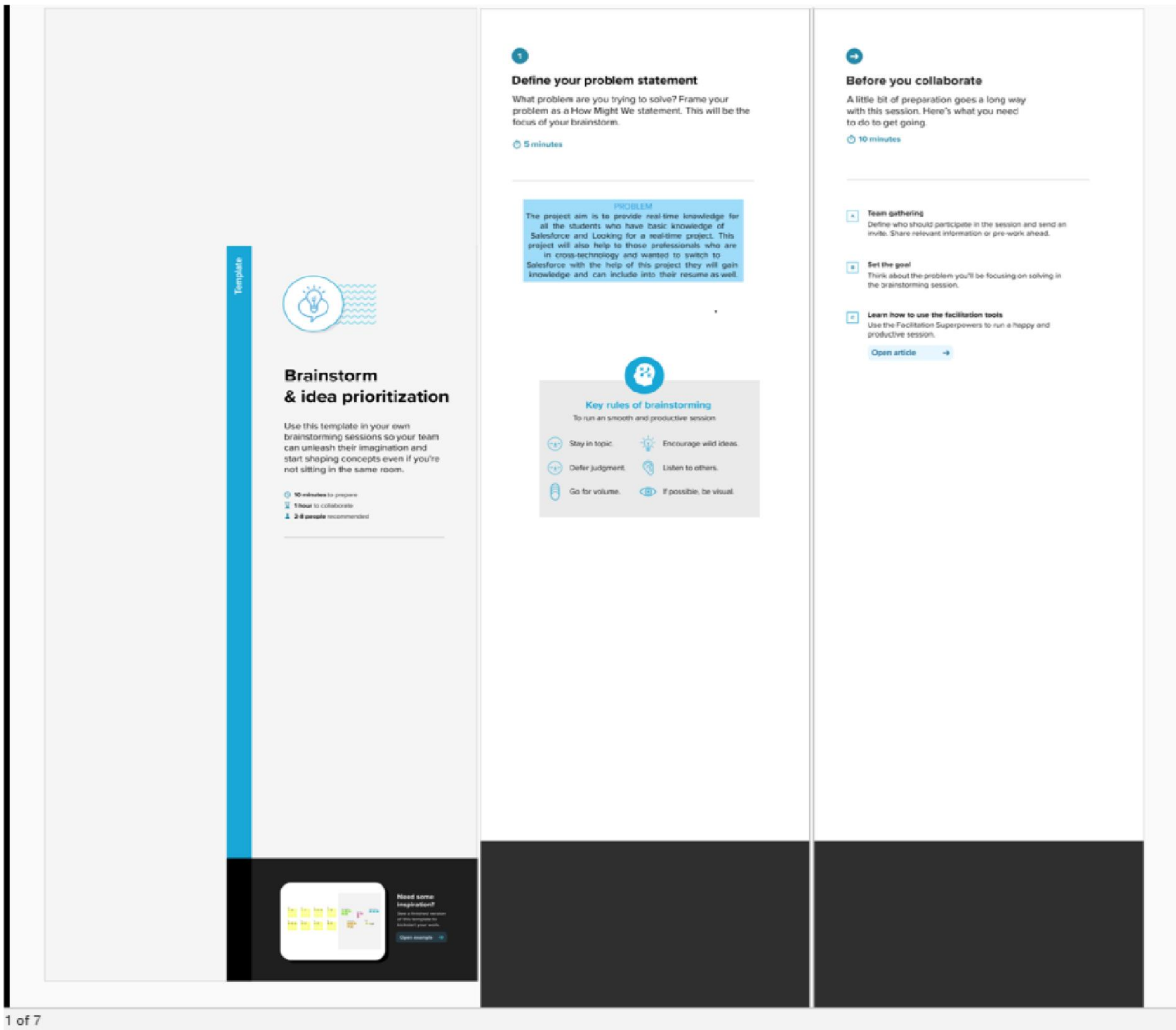
An empathy map is a simple, easy-to-digest visual that captures knowledge about a user's behavior and attitudes.



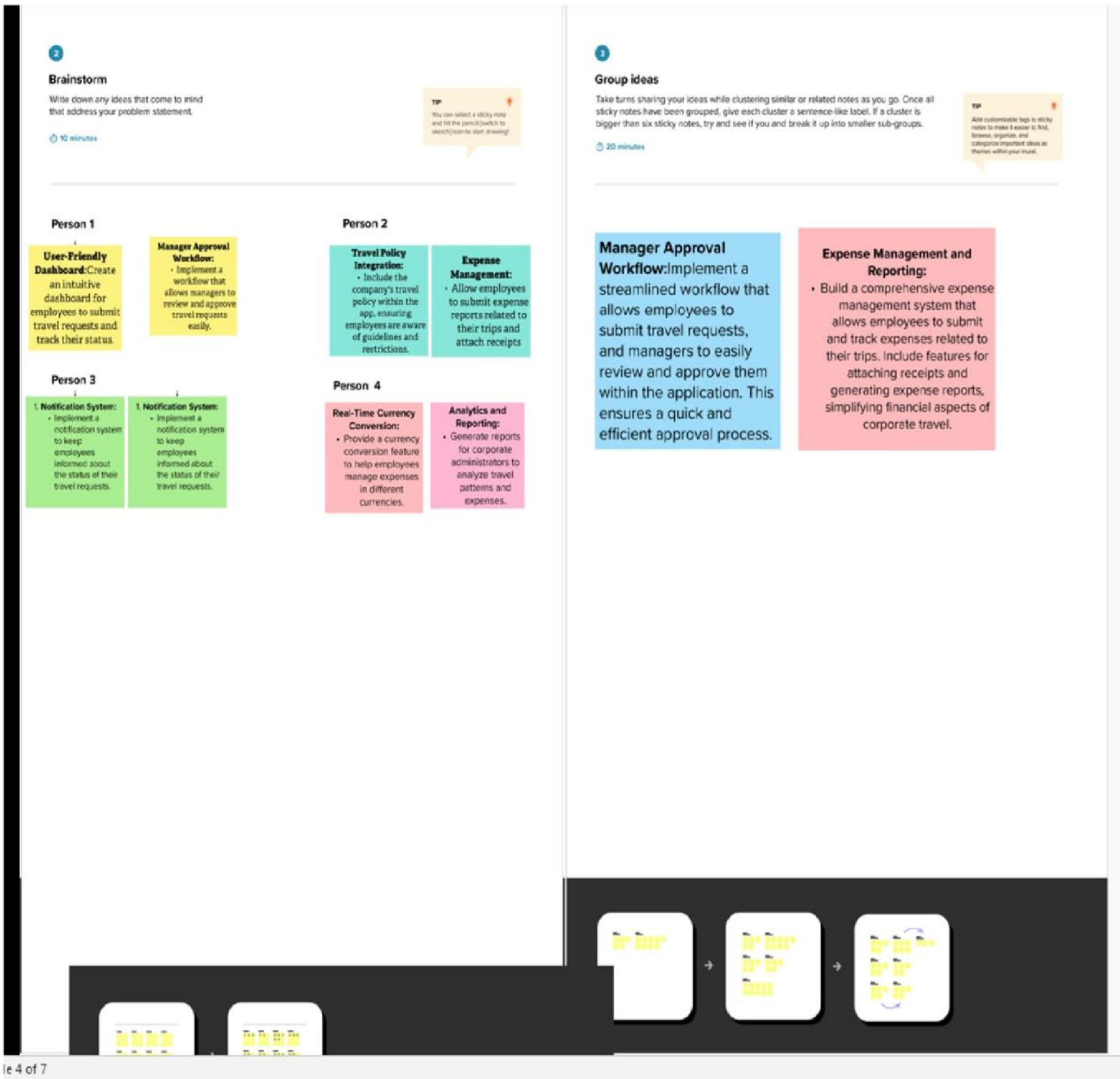
1.5 Ideation & Brainstorming

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.

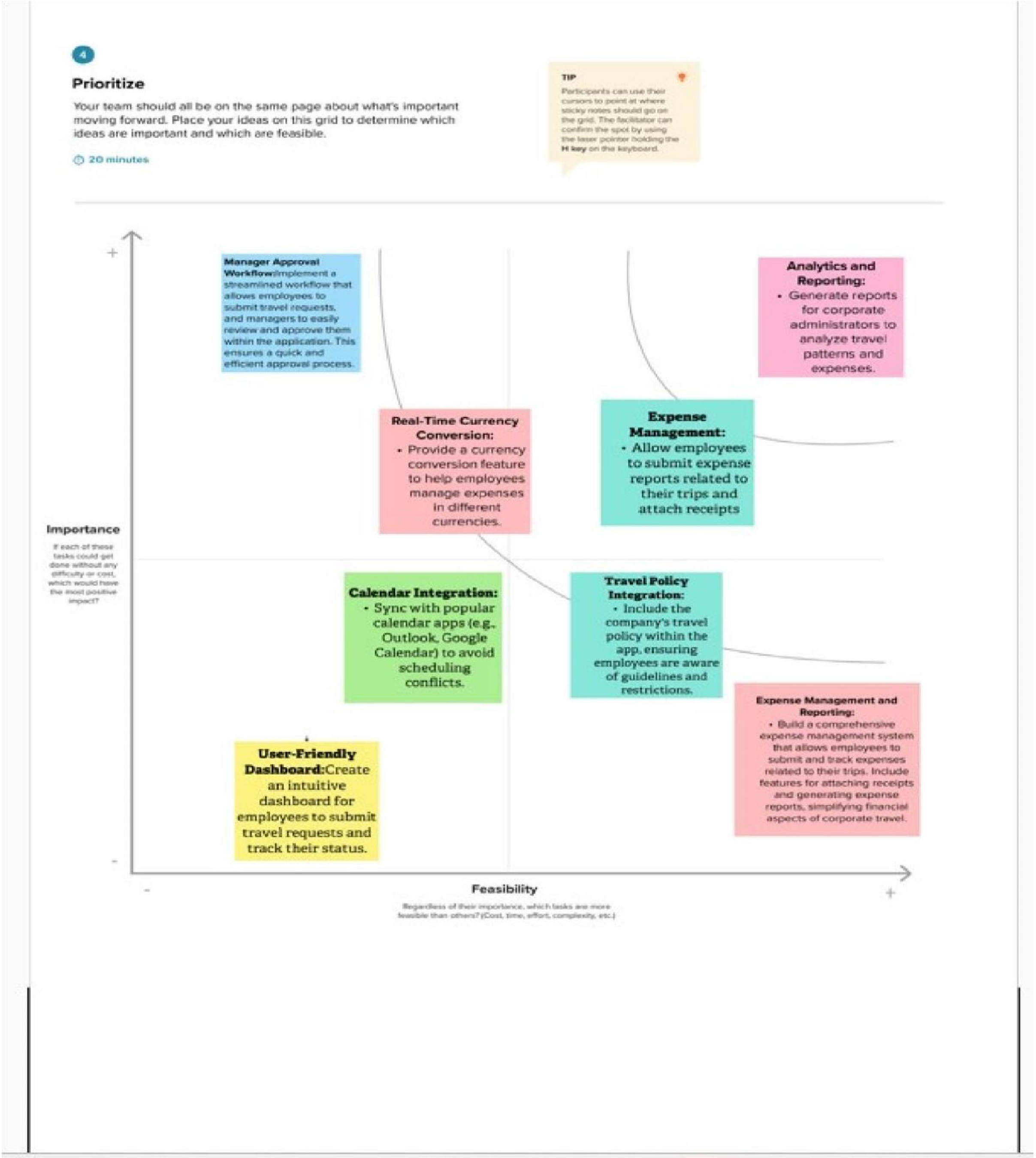
Step-1: Team Gathering, Collaboration and Select the Problem Statement:



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)	In the highly competitive E-commerce industry, businesses face the challenge of effectively managing customer relationships, sales, marketing, and service operations. As Ecommerce activities continue to grow and customer expectations rise, there is a pressing need for a comprehensive CRM (Customer Relationship Management) application tailored to the unique demands of this sector.
2.	Idea / Solution description	This CRM application will address the unique challenges faced by E-commerce companies in managing customer relationships, sales, marketing, and service operations. Data-Driven Decision-Making Detailed reporting and analytics provide valuable insights into customer behavior and marketing campaign performance.Businesses can better understand and engage with their customers, leading to improved customer loyalty and retention.
3.	Novelty / Uniqueness	What sets our solution apart is the innovative use of Salesforce, a highly customizable and powerful platform, to streamline corporate travel management. The automation of approval workflows and integration with external systems will significantly reduce manual work and errors. The mobile app component will provide users with the flexibility and convenience of on-the-go access. Furthermore, the incorporation of robust reporting and analytics tools will enable datadriven decision-making and offer insights into travel expenses, setting our solution apart from conventional methods.

4.	Social Impact / Customer Satisfaction	Ensuring compliance with data protection regulations, such as GDPR, demonstrates a commitment to protecting customer data. This safeguards customer privacy and sets a positive example for data handling practices in the industry. well-managed CRM system can help optimize supply chains and reduce unnecessary waste in E-commerce operations. This contributes to sustainability and reduced environmental impact.

1.7 Functional & Technical Requirements

1.7.1 Functional Requirements

FR No.	Functional Requirement (Epic)	Sub Requirement (Story / Sub-Task)
FR 1	Customer Management	**Customer Profiles:** Create and maintain detailed customer profiles with information such as contact details, purchase history, and communication preferences. **Lead Management:** Capture and manage leads from multiple sources, including website inquiries, email, and social media. **Contact and Account Management:** Track individual contacts and accounts associated with customers, including roles and affiliations.

FR 2	Sales Management	**Opportunity Tracking:** Manage sales opportunities, including stages, close dates, and sales team assignments. **Sales Pipeline:** Visualize and report on the sales pipeline, allowing for revenue forecasting and monitoring sales performance. **Quote and Proposal Generation:** Generate quotes, proposals, and sales documents within the CRM application.
FR 3	Market Automation	**Customer Segmentation:** Segment the customer base based on demographics, purchase history, and behavior for targeted marketing. **Lead Nurturing:** Automate lead nurturing processes, such as email sequences, to move leads through the sales funnel. **Email Marketing:** Manage email marketing campaigns, including email templates, scheduling, and tracking
FR 4	Order and Inventory Integration	**E-commerce Platform Integration**: Integrate with E-commerce platforms to sync order data, inventory levels, and product catalogs in real-time. **Order Tracking:** Provide real-time order tracking for customers to monitor the status of their orders. **Inventory Management:** Ensure accurate product availability information, prevent overselling, and track stock levels.

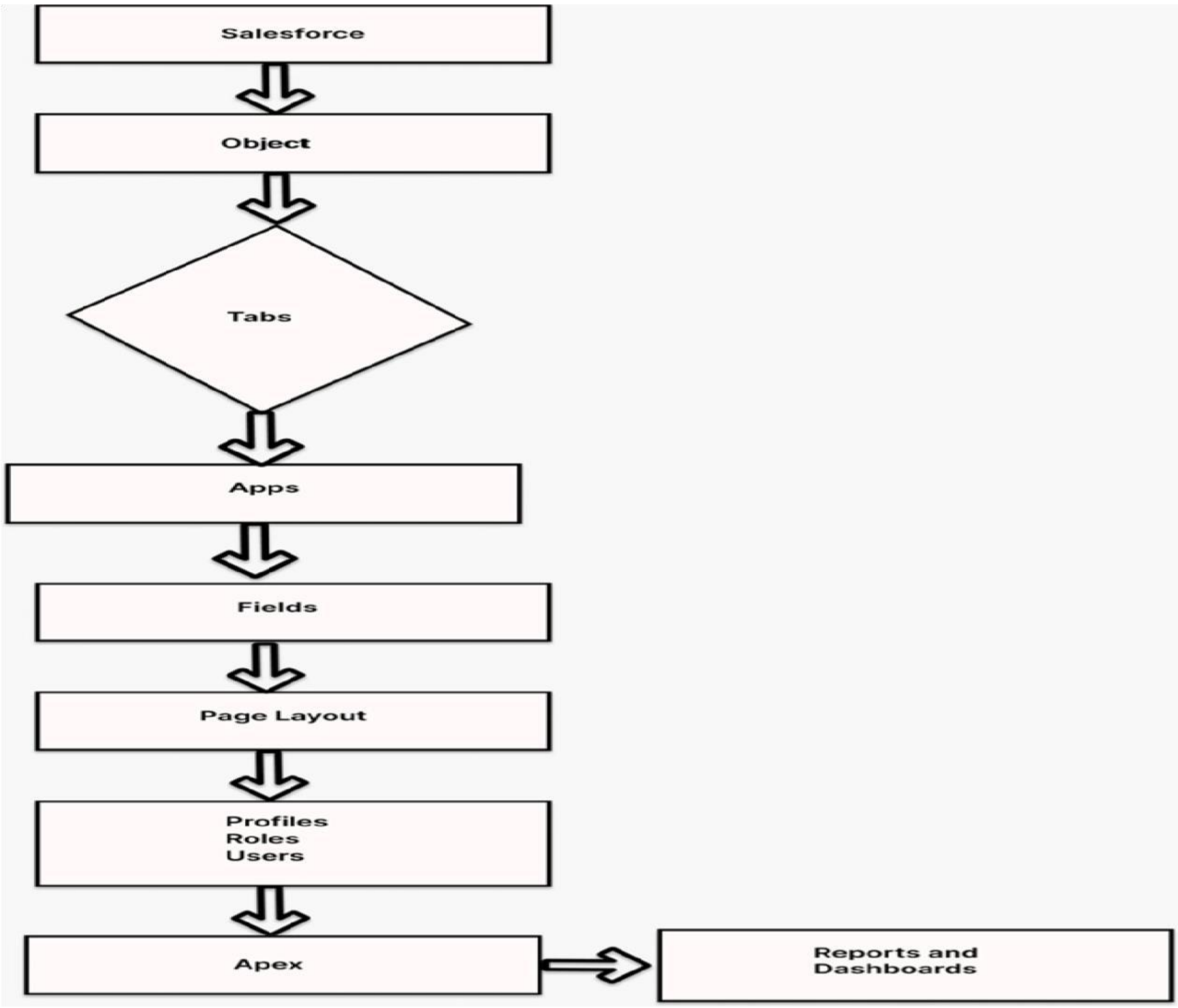
FR 5	Reporting and Analytics	**Report Generation:** Create custom reports and dashboards to track sales performance, customer behavior, and marketing campaign effectiveness. **Key Performance Indicators (KPIs):** Define and monitor KPIs to make data-driven decisions and assess the health of the business. **Analytics:** Implement analytics features for advanced insights into customer behavior and trends.
FR 6	User Access and Permissions	**User Roles and Profiles:** Define user roles and profiles with specific permissions to control data access and system functionality.

1.7.2 Technical Requirements

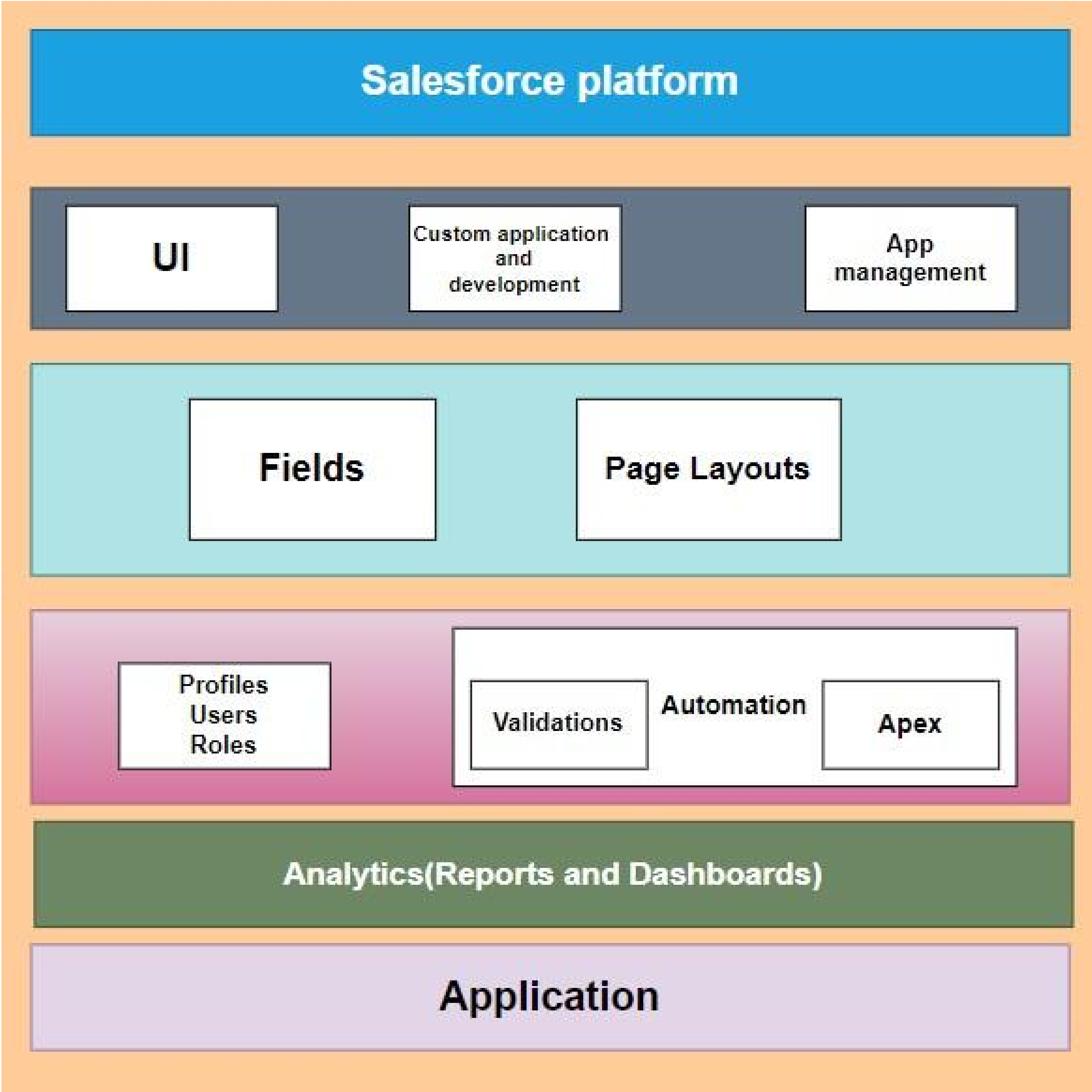
TR No.	Technical Requirement	Description
TR-1	Salesforce Environment	Utilize Salesforce's Enterprise or Unlimited edition to ensure scalability and access to advanced features.
TR-2	Development language	Develop using Salesforce's proprietary programming language, Apex, for server side logic.
TR-3	Security	• Implement role-based access control (RBAC) to control who can access and modify data. • Encrypt sensitive data both in transit and at rest. • Utilize Salesforce Shield for enhanced security, including event monitoring and field-level encryption.

TR-4	Integration	• Use REST and SOAP APIs for integration with external systems, such as finance and expense management tools. • Implement Single Sign-On (SSO) solutions for seamless and secure access.
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



1.8.2 Technical Archictecture

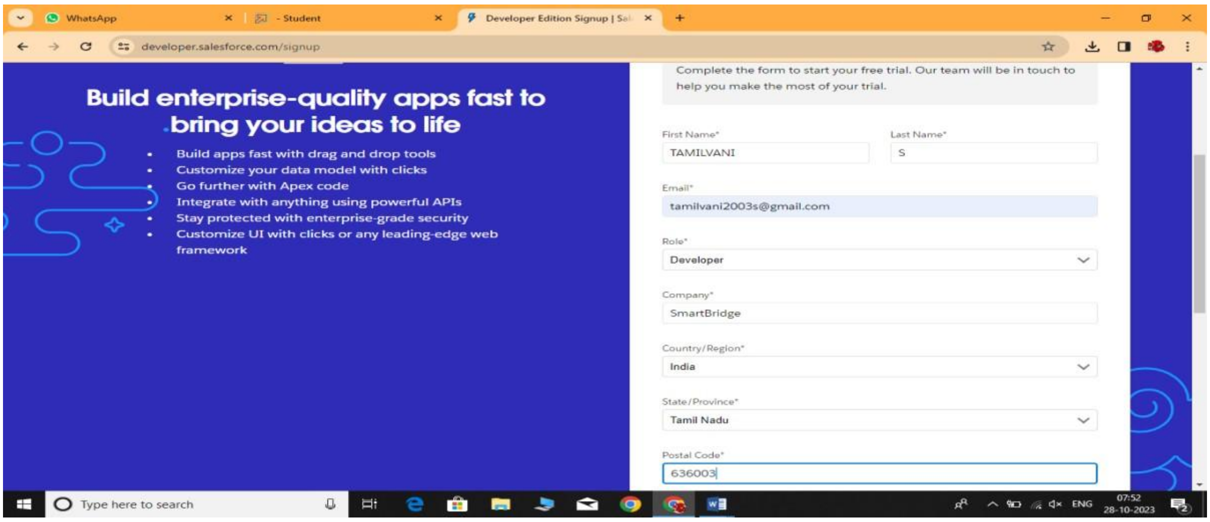

Salesforce platform
UI
Custom application
and
development
App
management
Fields
Page Layouts
Profiles
Users
Roles
Validations
Automation
Apex
Analytics(Reports and Dashboards)
Application

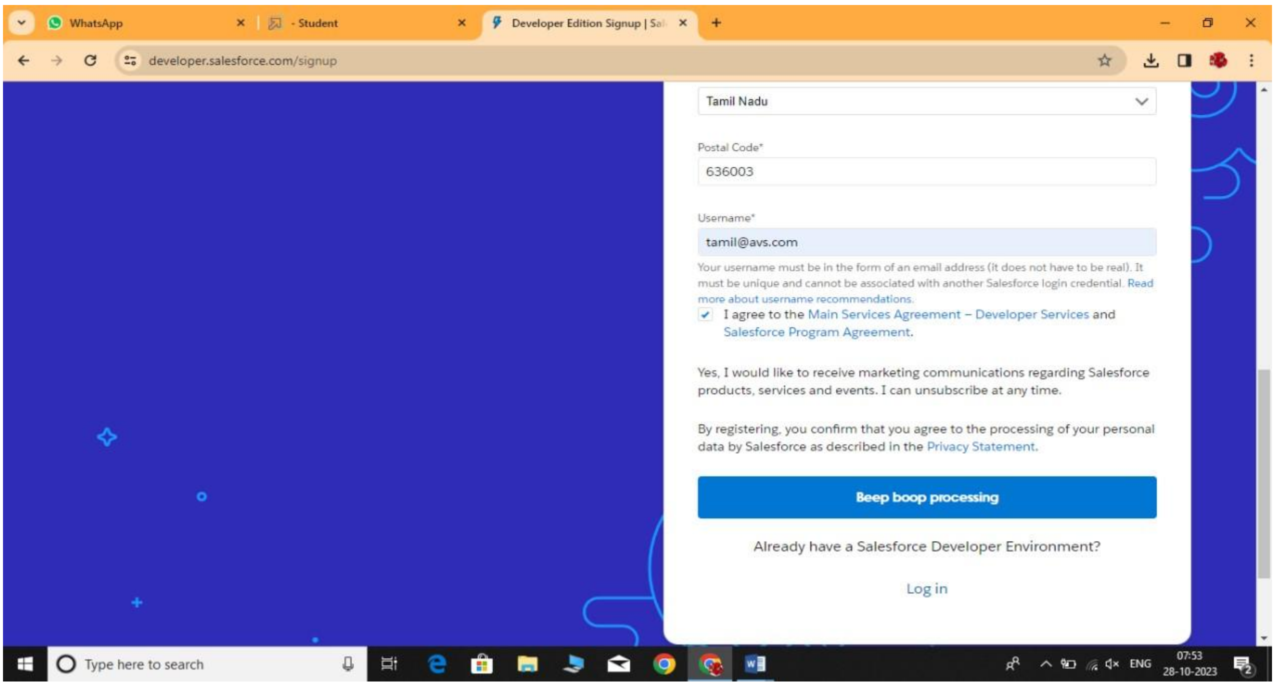
CHAPTER-2

PREPARATION DATA MODELING

2.1 Salesforce Developer Org

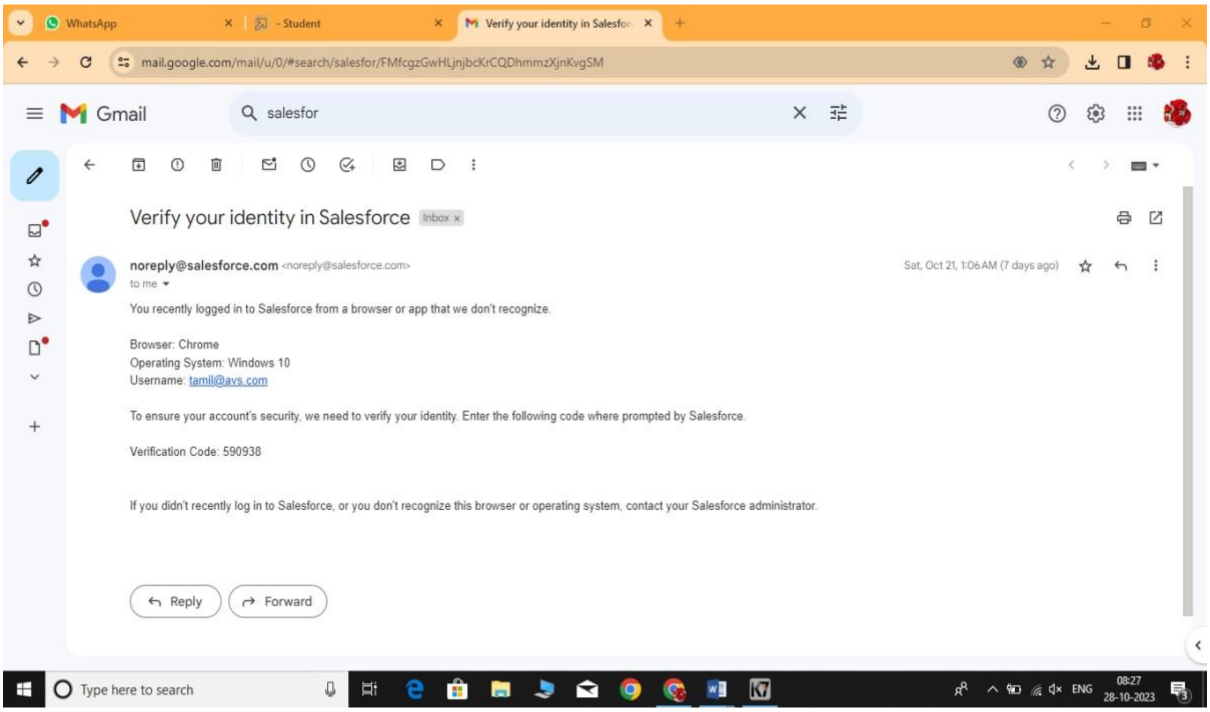
In Salesforce, a Developer Sign Up or Developer Edition is a special type of Salesforce environment that is primarily used for development, testing, and learning purposes.

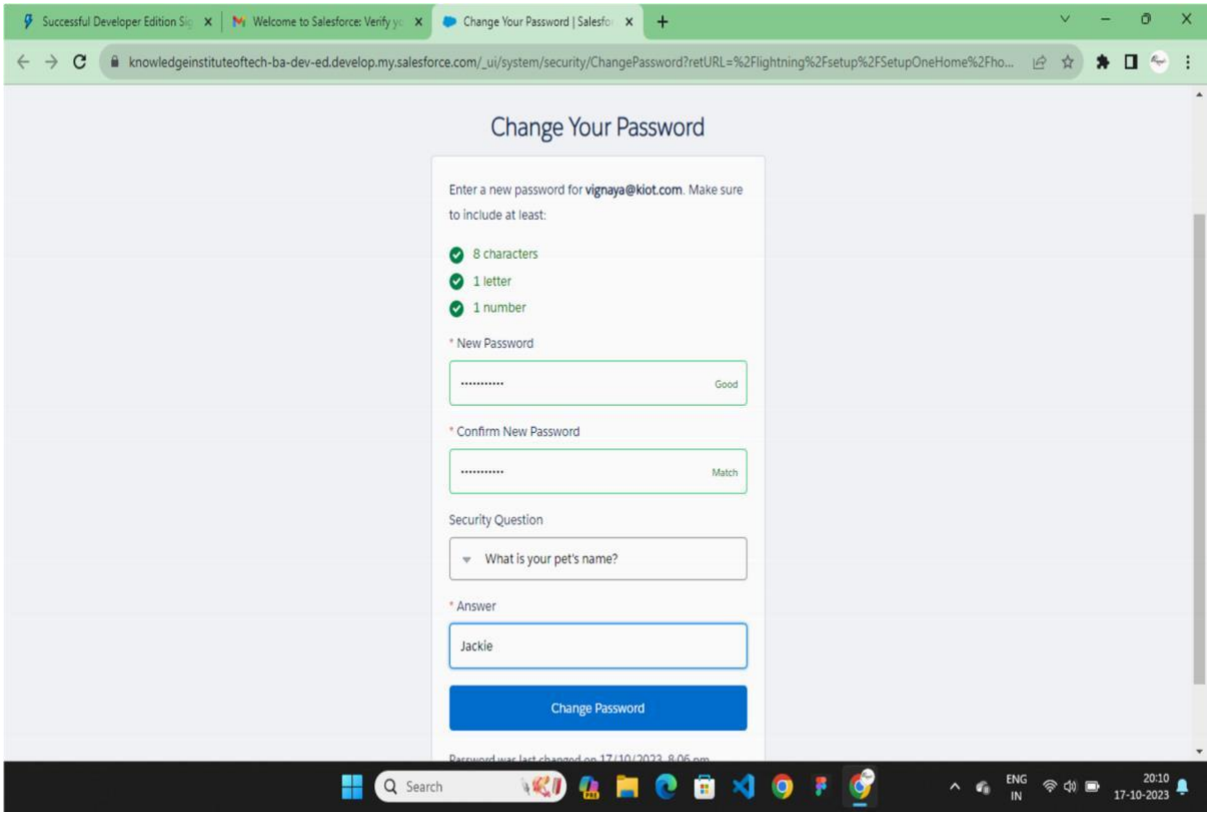




Account Activation

Activation tracks information about devices from which users have verified their identity.





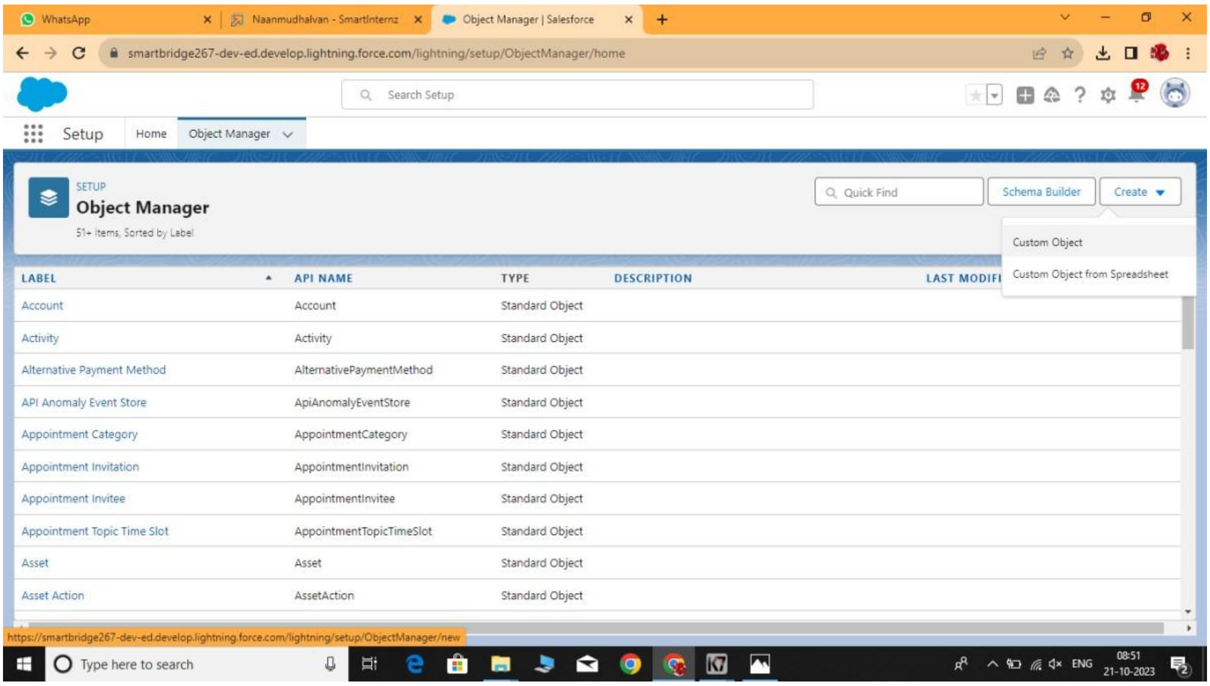
2.2 Custom Object Creation & Tabs

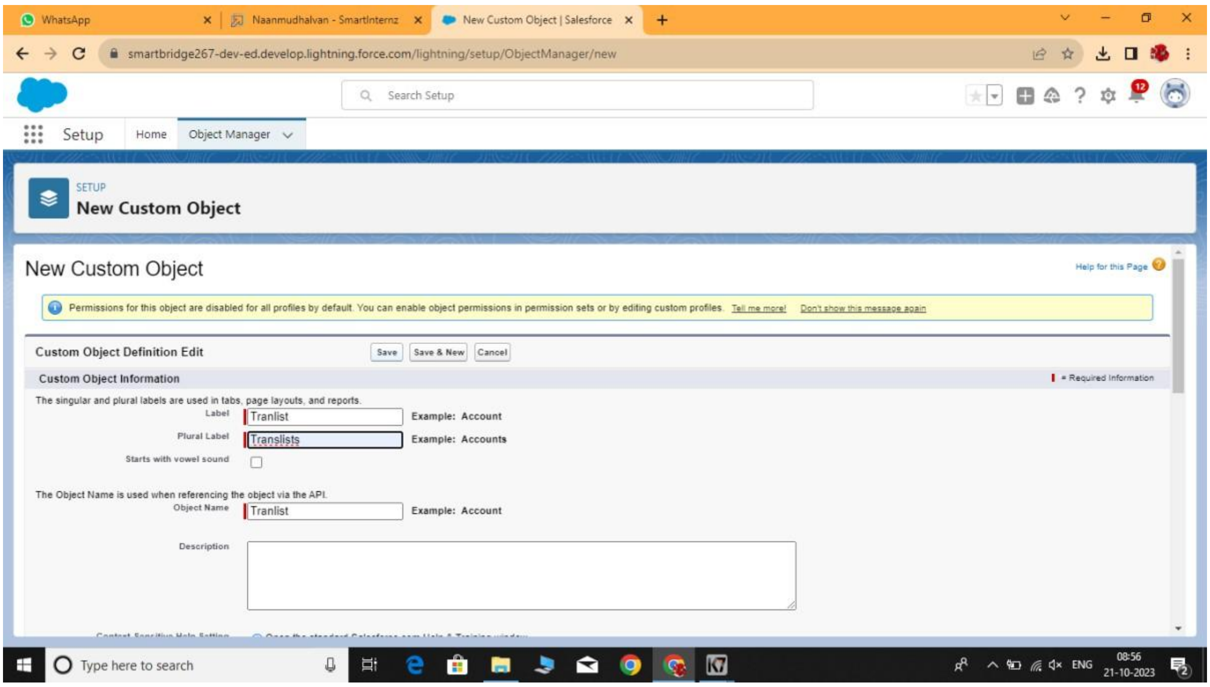
Custom Object Creation

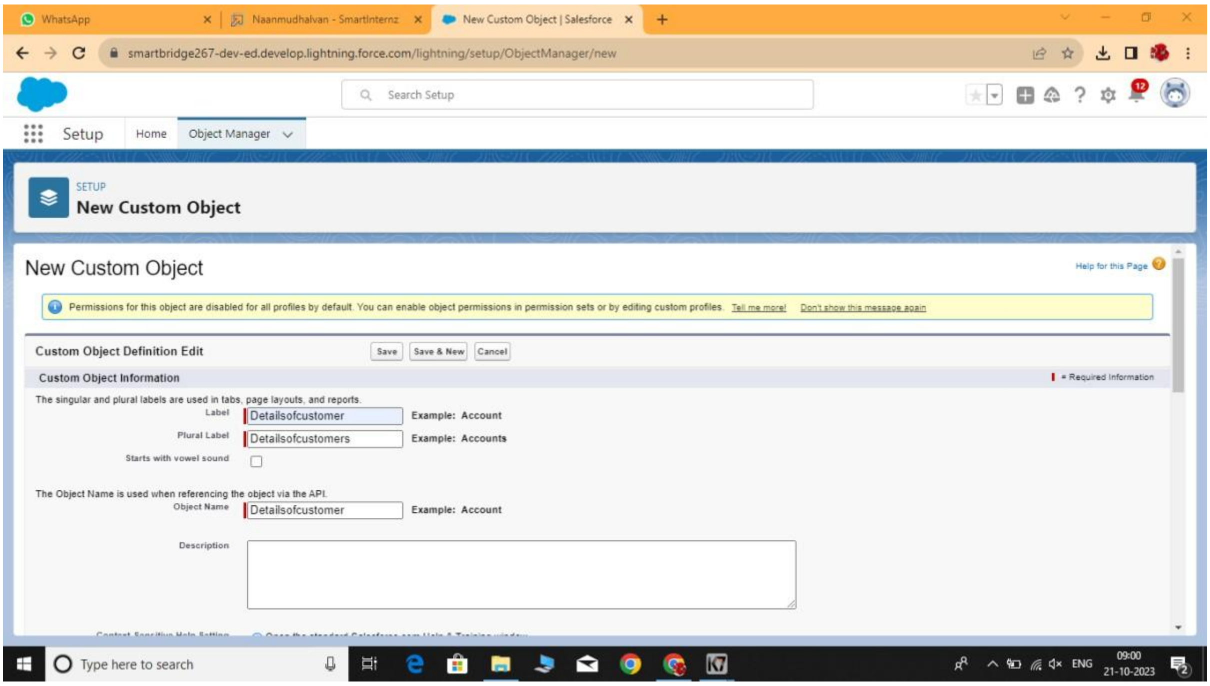
Objects are containers for your information, but they also give you special functionality.

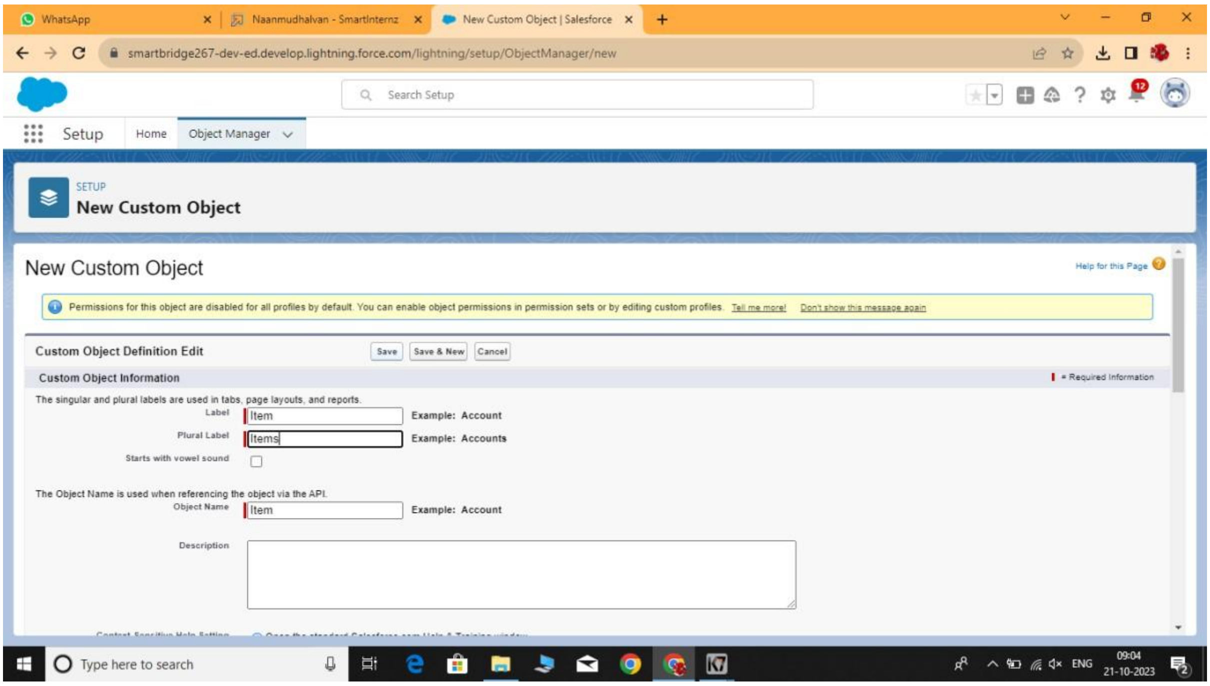
Custom objects are create to store information that's specific to your company or industry.

Custom Objects in CRM App :



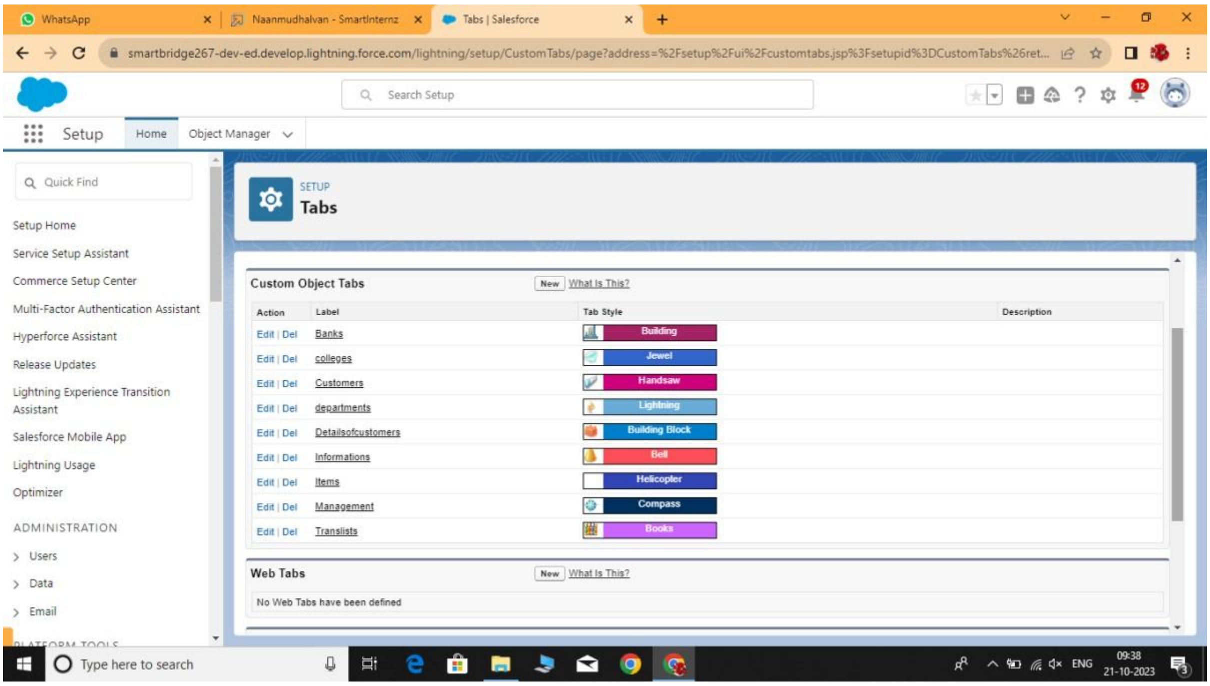




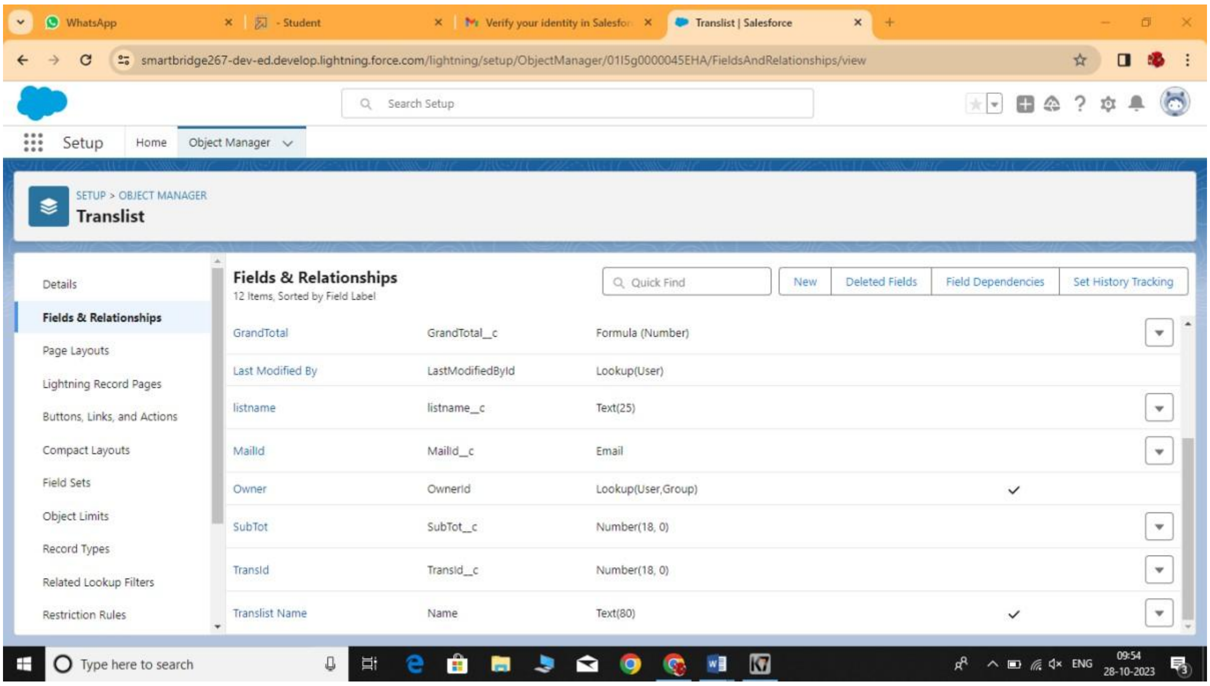


Tabs for Created Objects:

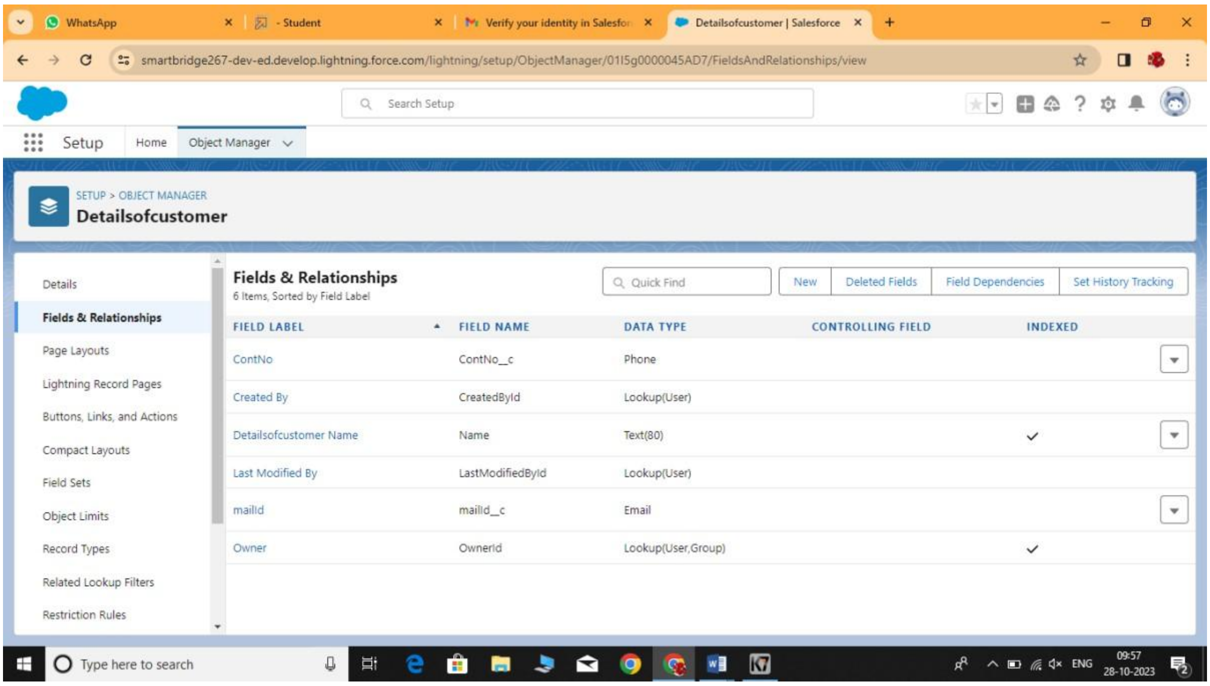
Salesforce Tabs are like the menu options in a software application. They allow you to access specific functions, objects, or data.



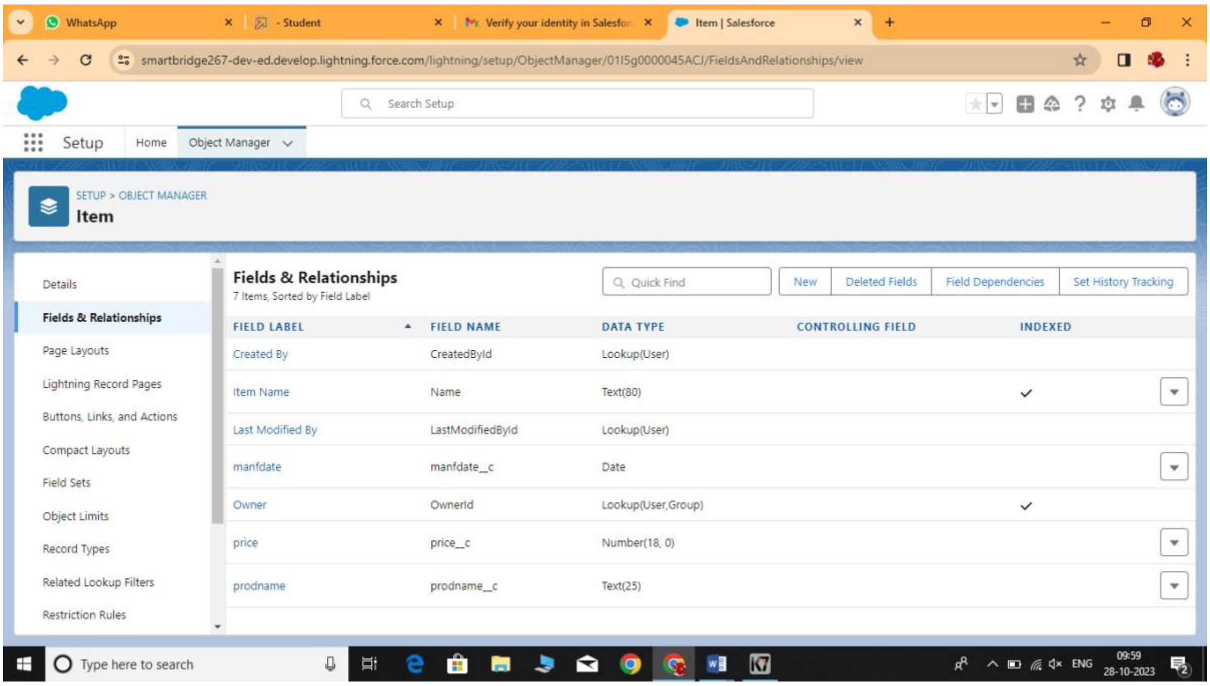
Fields in Translist Object:



Fields in DetaisOfCustomer Object:



Fields of Item Object:

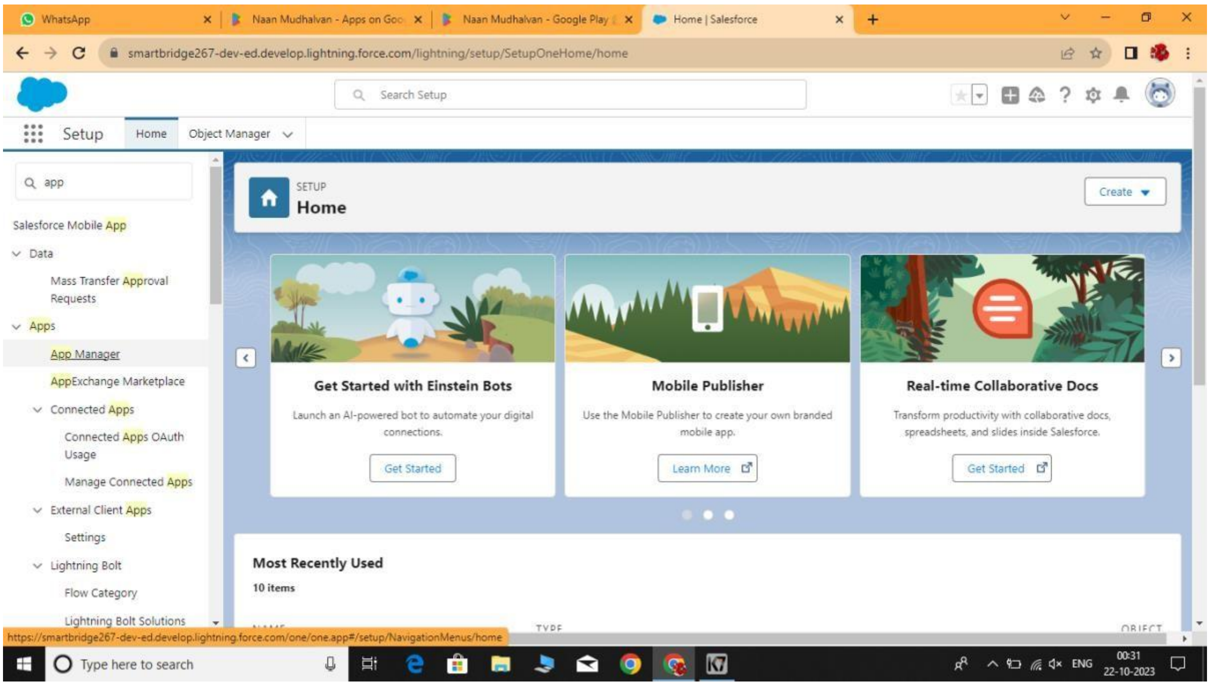


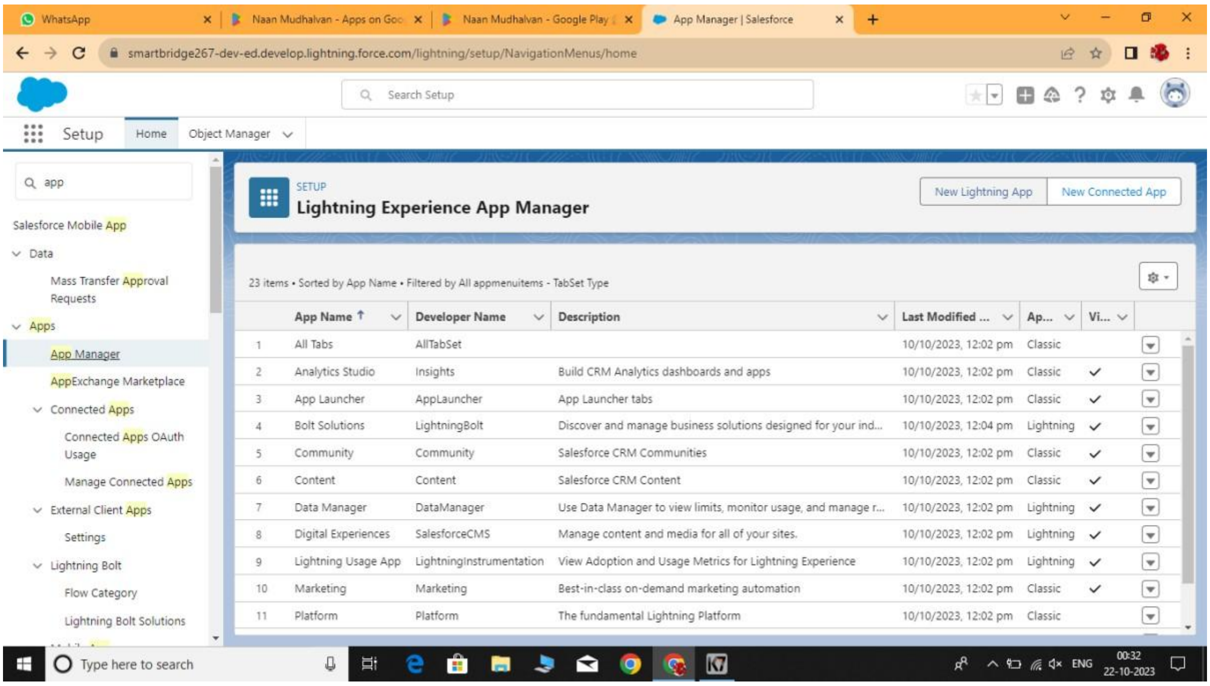
2.3 Lightning App

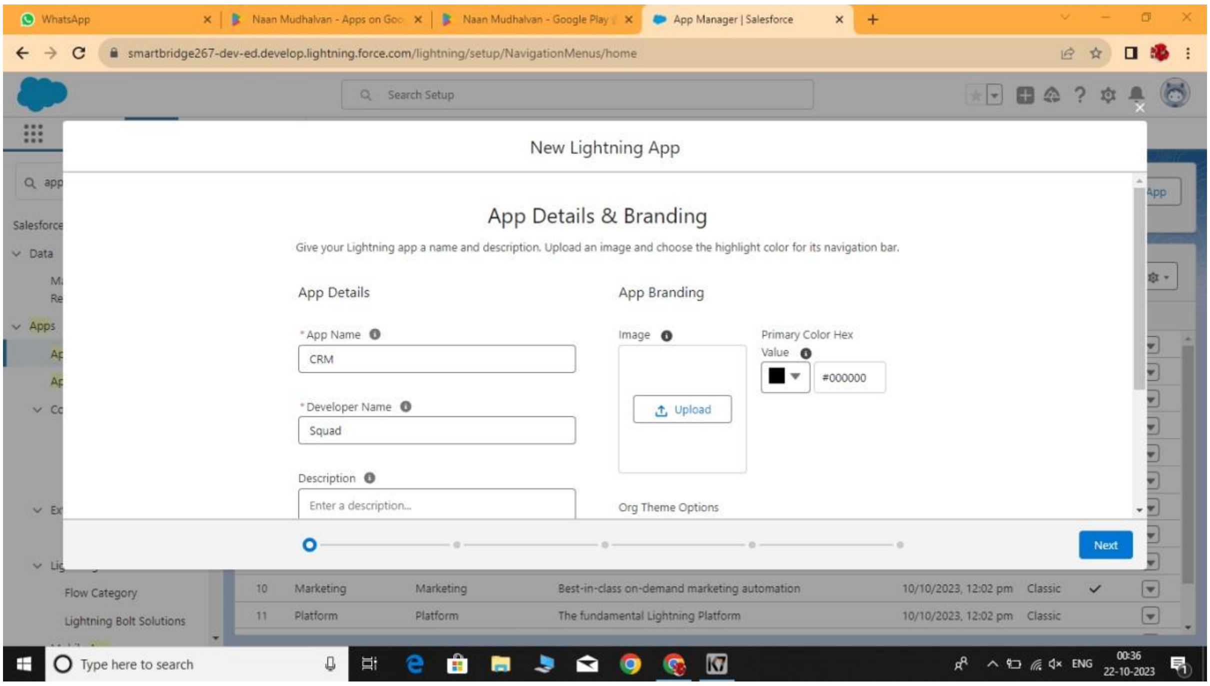
The Lightning App Builder is a point-and-click tool that makes it easy to create custom pages for the Salesforce mobile app and Lightning Experience, giving your users what they need all in one place.

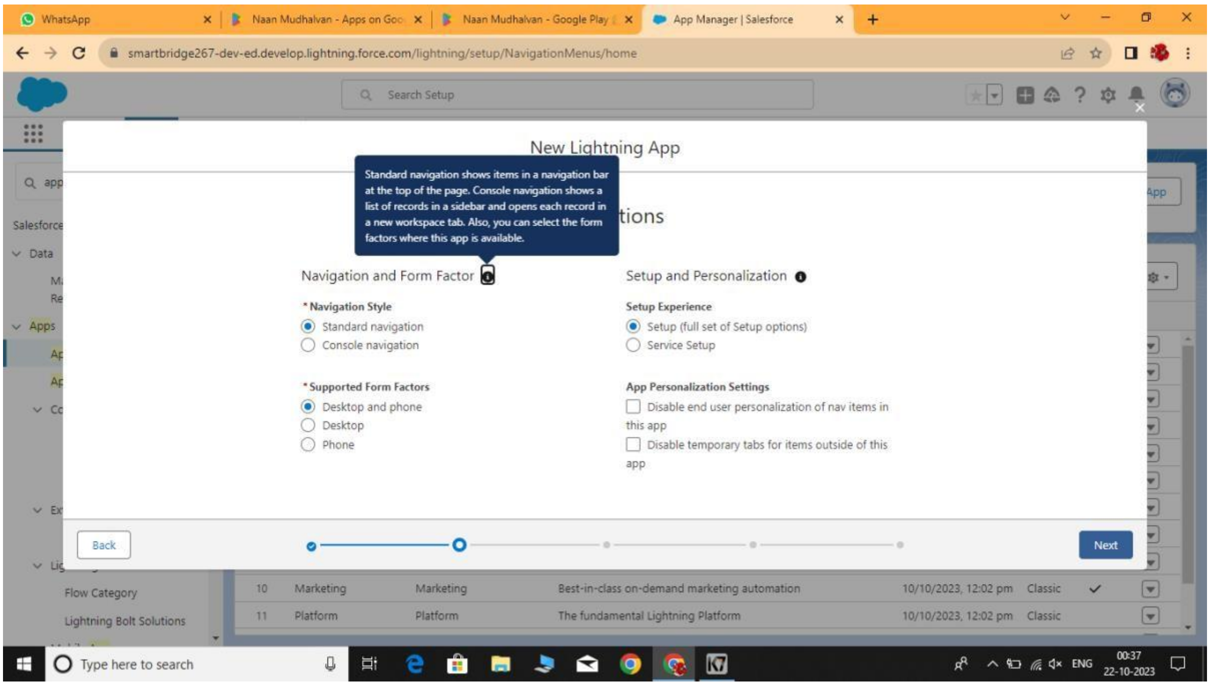
Create a CRM Lightning App

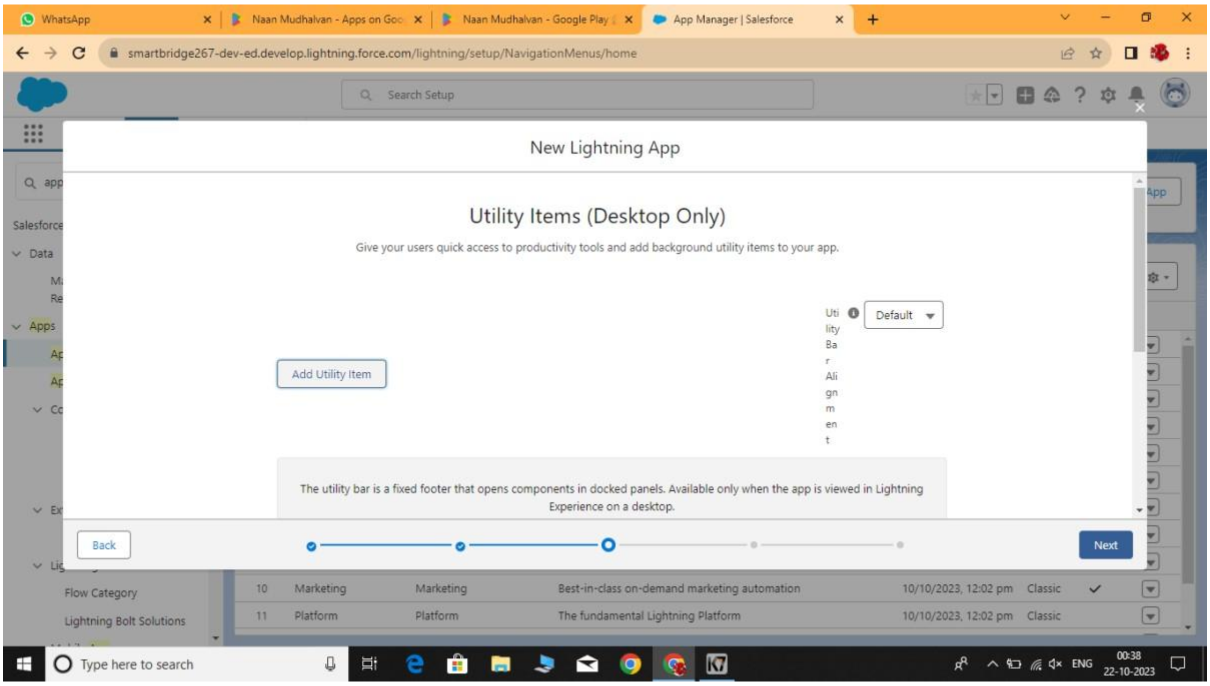
- Build a Lightning app, add tabs, and customize page layouts.
- Create custom objects and fields for the app.
- Define relationships between objects.
- Import data and test the app.

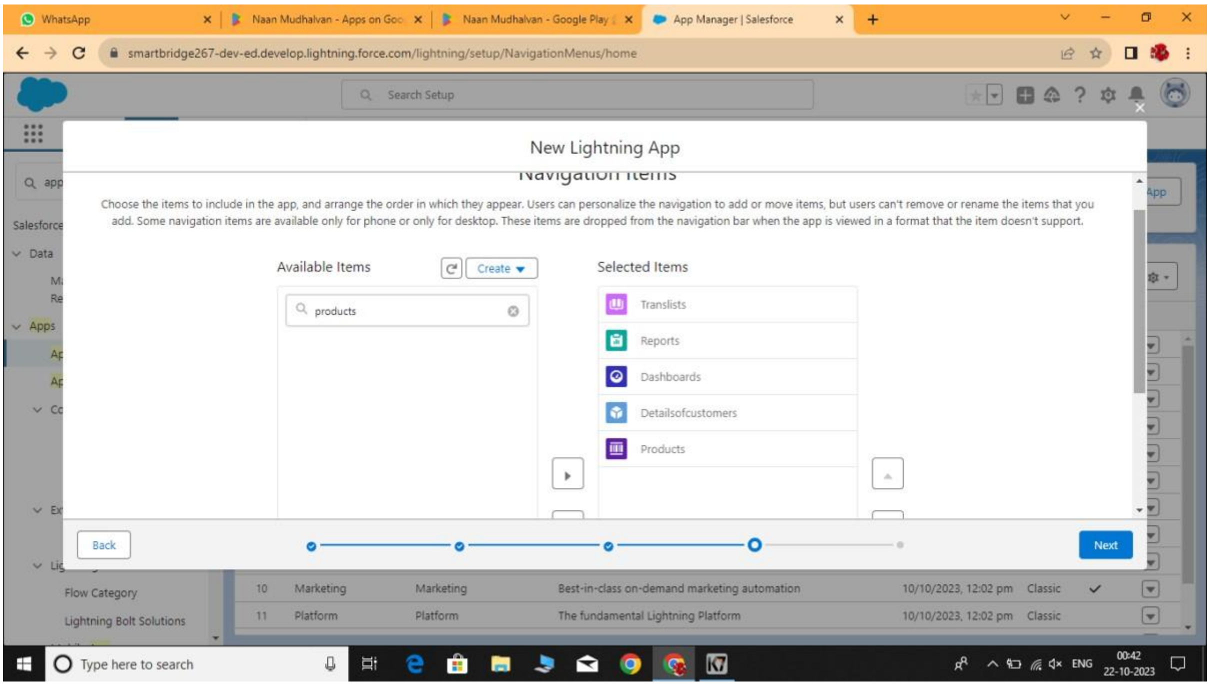


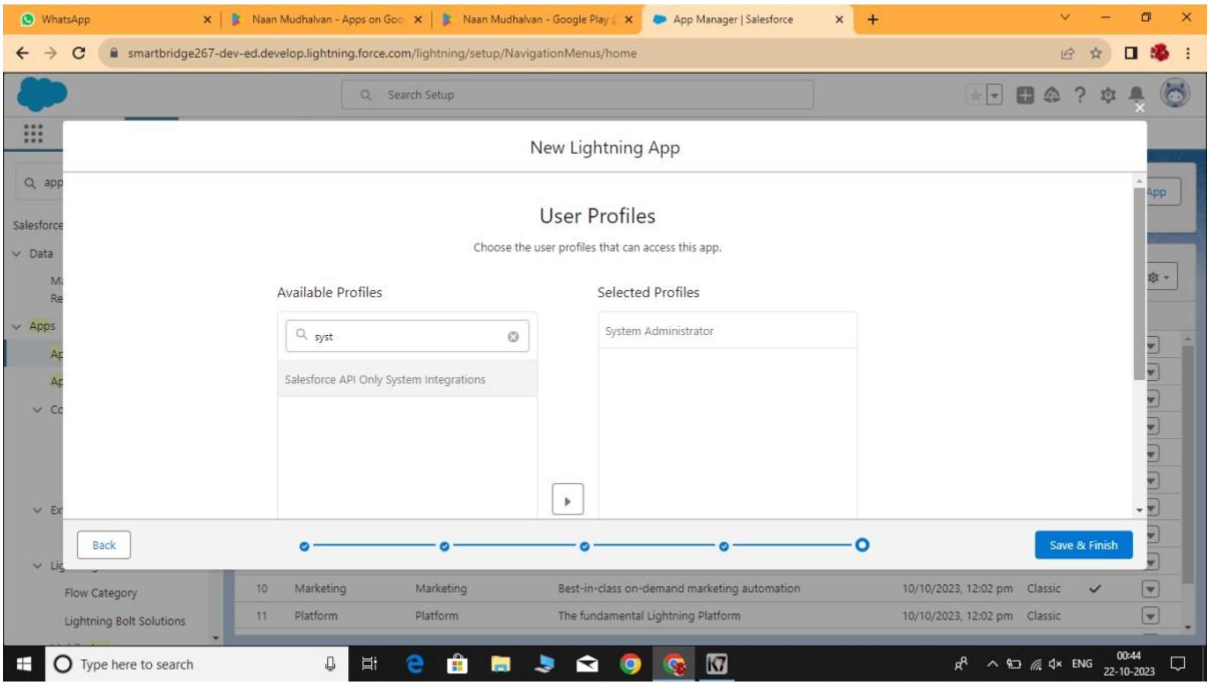

WhatsApp
Naan Mudhalvan - Apps on Goo
Naan Mudhalvan - Google Play
App Manager | Salesforce
smartbridge267-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home
Search Setup
Setup
Home
Object Manager
app
Salesforce Mobile App
Data
Mass Transfer Approval Requests
Apps
App Manager
AppExchange Marketplace
Connected Apps
Connected Apps OAuth Usage
Manage Connected Apps
External Client Apps
Settings
Lightning Bolt
Flow Category
Lightning Bolt Solutions
SETUP
Lightning Experience App Manager
New Lightning App
New Connected App
23 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type
App Name
Developer Name
Description
Last Modified ...
Ap...
Vi...
1 All Tabs AllTabSet 10/10/2023, 12:02 pm Classic
2 Analytics Studio Insights Build CRM Analytics dashboards and apps 10/10/2023, 12:02 pm Classic
3 App Launcher AppLauncher App Launcher tabs 10/10/2023, 12:02 pm Classic
4 Bolt Solutions LightningBolt Discover and manage business solutions designed for your ind... 10/10/2023, 12:04 pm Lightning
5 Community Community Salesforce CRM Communities 10/10/2023, 12:02 pm Classic
6 Content Content Salesforce CRM Content 10/10/2023, 12:02 pm Classic
7 Data Manager DataManager Use Data Manager to view limits, monitor usage, and manage r... 10/10/2023, 12:02 pm Lightning
8 Digital Experiences SalesforceCMS Manage content and media for all of your sites. 10/10/2023, 12:02 pm Lightning
9 Lightning Usage App LightningInstrumentation View Adoption and Usage Metrics for Lightning Experience 10/10/2023, 12:02 pm Lightning
10 Marketing Marketing Best-in-class on-demand marketing automation 10/10/2023, 12:02 pm Classic
11 Platform Platform The fundamental Lightning Platform 10/10/2023, 12:02 pm Classic
Type here to search
ENG
00:32
22-10-2023

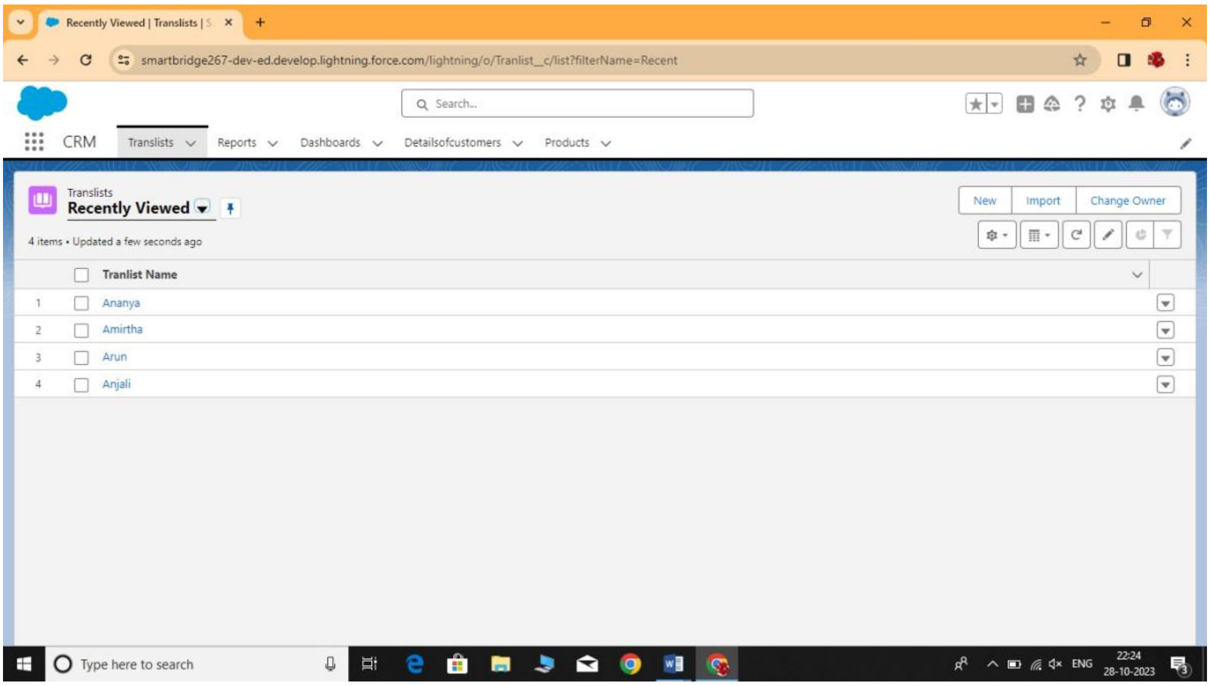

WhatsApp
Naan Mudhalvan - Apps on Goo
Naan Mudhalvan - Google Play
App Manager | Salesforce
smartbridge267-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home
Search Setup
New Lightning App
App Details & Branding
Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.
App Details
App Branding
* App Name
CRM
* Developer Name
Squad
Description
Enter a description...
Image
Upload
Primary Color Hex Value
#000000
Org Theme Options
Next
Flow Category
Lightning Bolt Solutions
10 Marketing Marketing Best-in-class on-demand marketing automation 10/10/2023, 12:02 pm Classic
11 Platform Platform The fundamental Lightning Platform 10/10/2023, 12:02 pm Classic
Type here to search
ENG
00:36
22-10-2023


New Lightning App
Standard navigation shows items in a navigation bar at the top of the page. Console navigation shows a list of records in a sidebar and opens each record in a new workspace tab. Also, you can select the form factors where this app is available.
Navigation and Form Factor
* Navigation Style
Standard navigation
Console navigation
* Supported Form Factors
Desktop and phone
Desktop
Phone
Setup and Personalization
Setup Experience
Setup (full set of Setup options)
Service Setup
App Personalization Settings
Disable end user personalization of nav items in this app
Disable temporary tabs for items outside of this app
Back
Next


New Lightning App
Utility Items (Desktop Only)
Give your users quick access to productivity tools and add background utility items to your app.
Add Utility Item
Utility Bar Alignment
Default
The utility bar is a fixed footer that opens components in docked panels. Available only when the app is viewed in Lightning Experience on a desktop.
Back
Next


New Lightning App
Navigation Items
Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.
Available Items
Create
products
Selected Items
Translists
Reports
Dashboards
Detailsofcustomers
Products
Back
Next

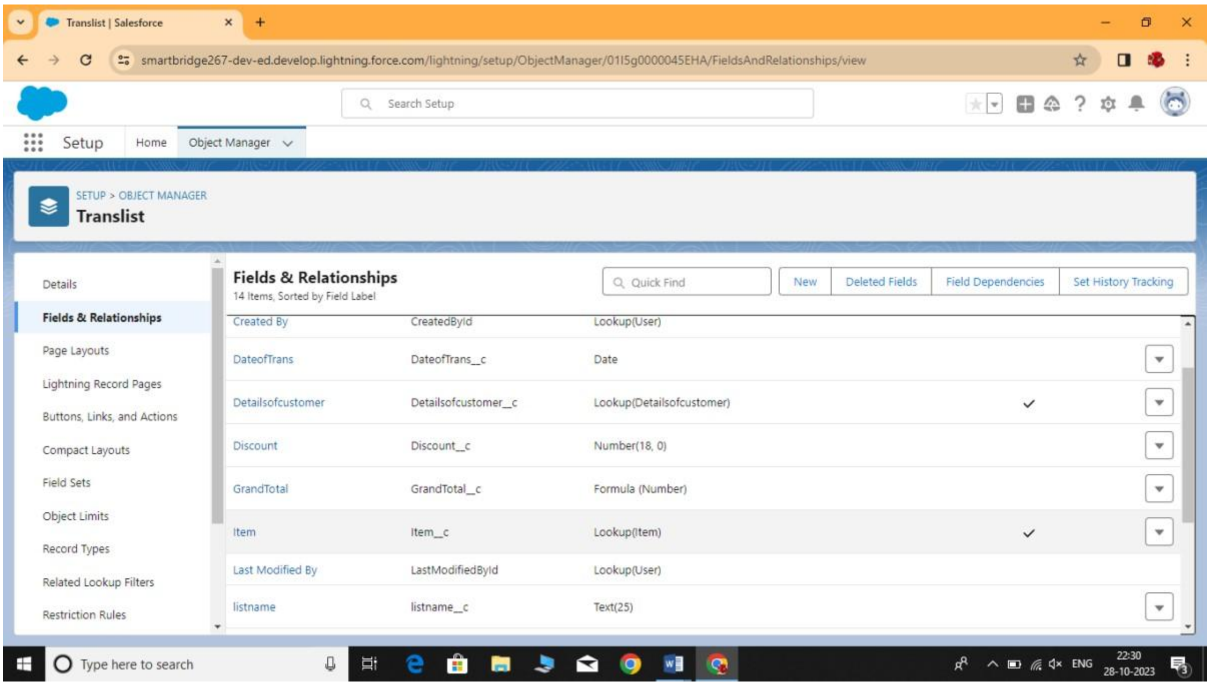

New Lightning App
User Profiles
Choose the user profiles that can access this app.
Available Profiles
syst
Salesforce API Only System Integrations
Selected Profiles
System Administrator
Back
Save & Finish



2.4 Relationship between Objects

Look up Relationship

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

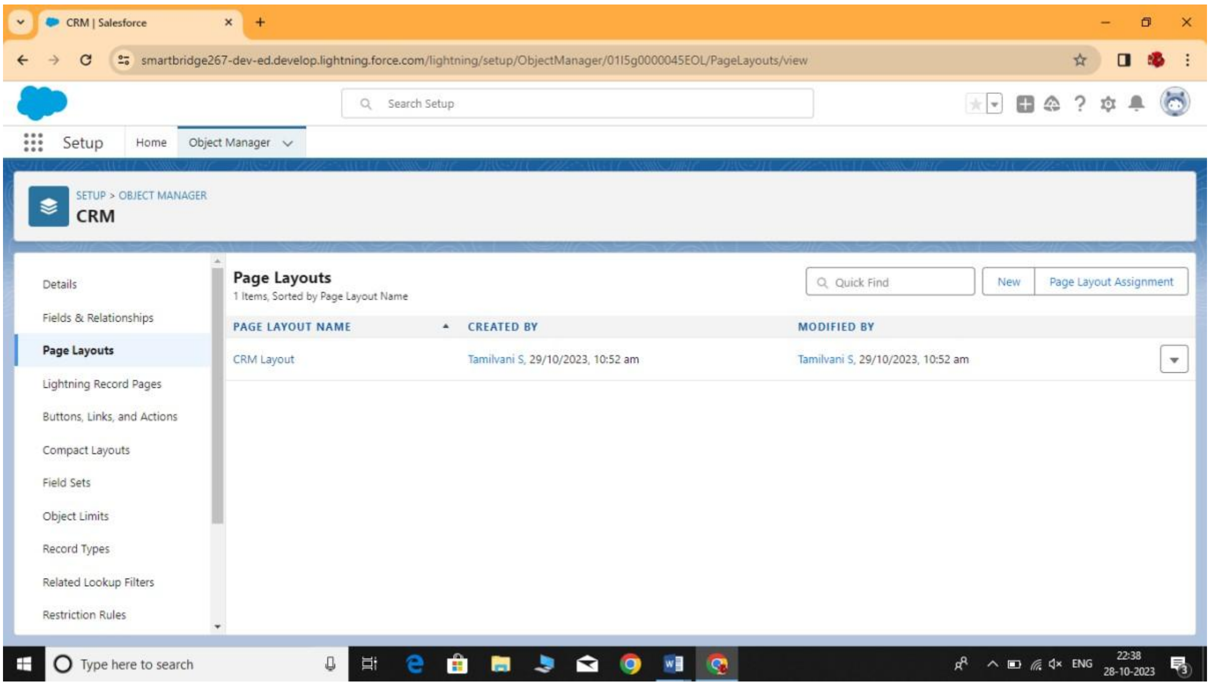


2.5 Customize User Interface

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.



2.6 Business Logic

Validation Rules

Validation rules let you set up business-specific criteria to prevent users from saving invalid data in one or more fields.

A validation rule evaluates a formula when a record is saved.

If a rule's criteria aren't met, users see a custom error message and the record doesn't save.

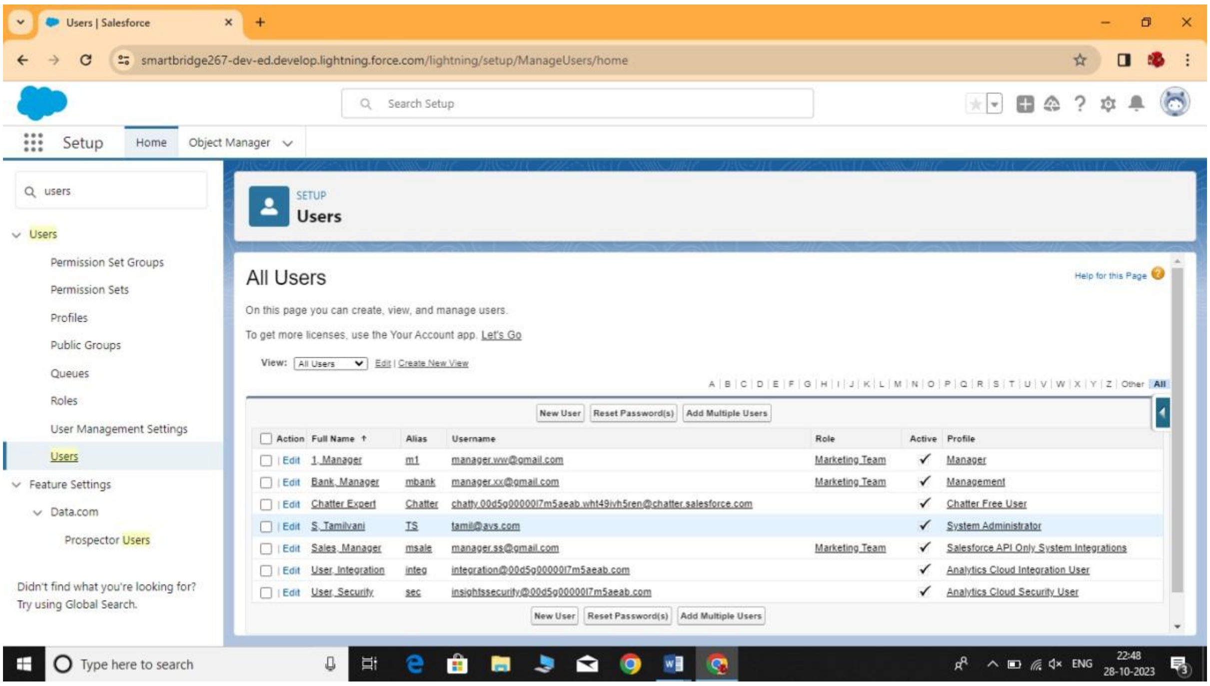
Use validation rules to improve data quality by applying conditions, ensuring proper formatting, and enforcing consistency.

CHAPTER-3

USERS & DATA SECURITY

3.1 User Creation & Setup Approvals

Before customizing the travel app, first create a new user, Eric Executive, and set him up as manager. This involves assigning roles and profiles so that Eric has the correct permissions to approve travel requests.

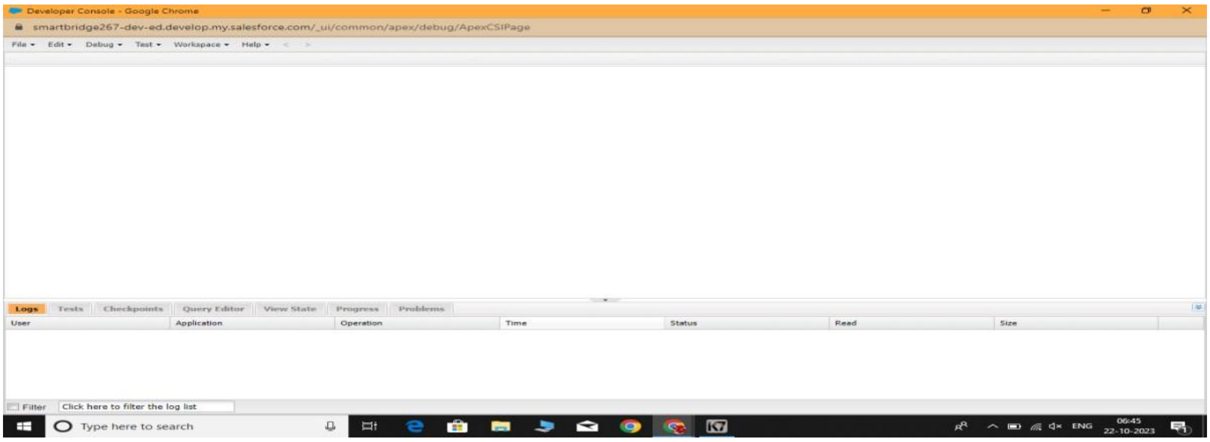


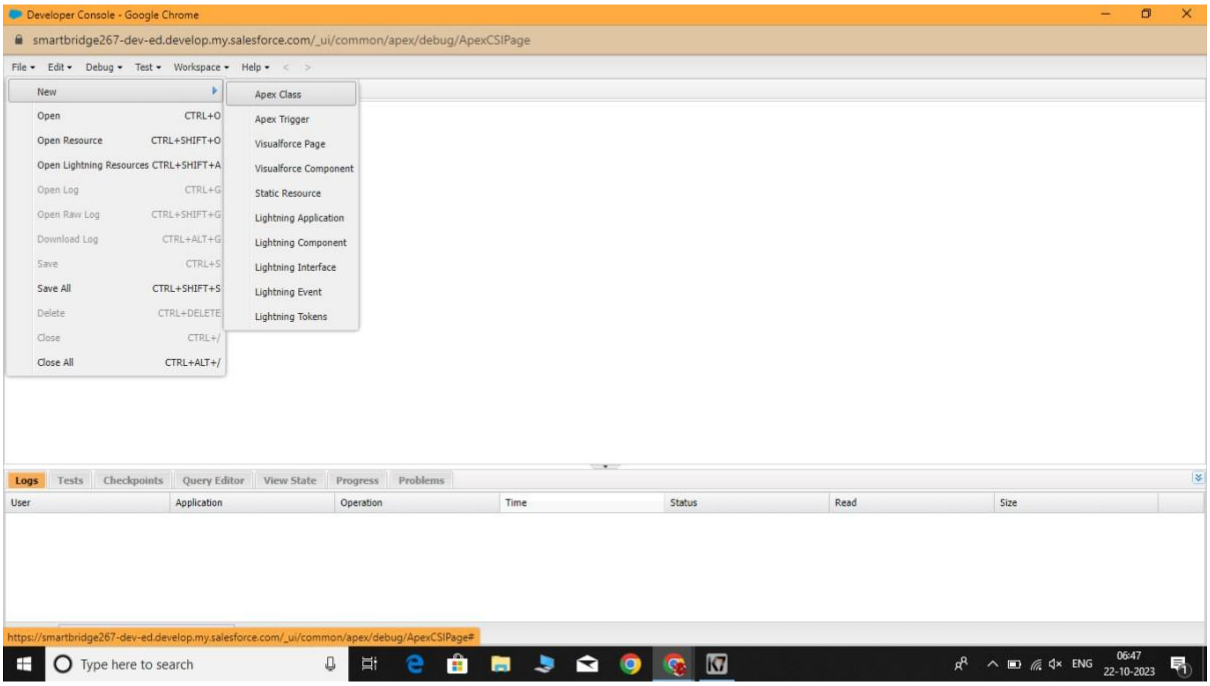
CHAPTER-4 APEX & THEIR SCHEDULERS

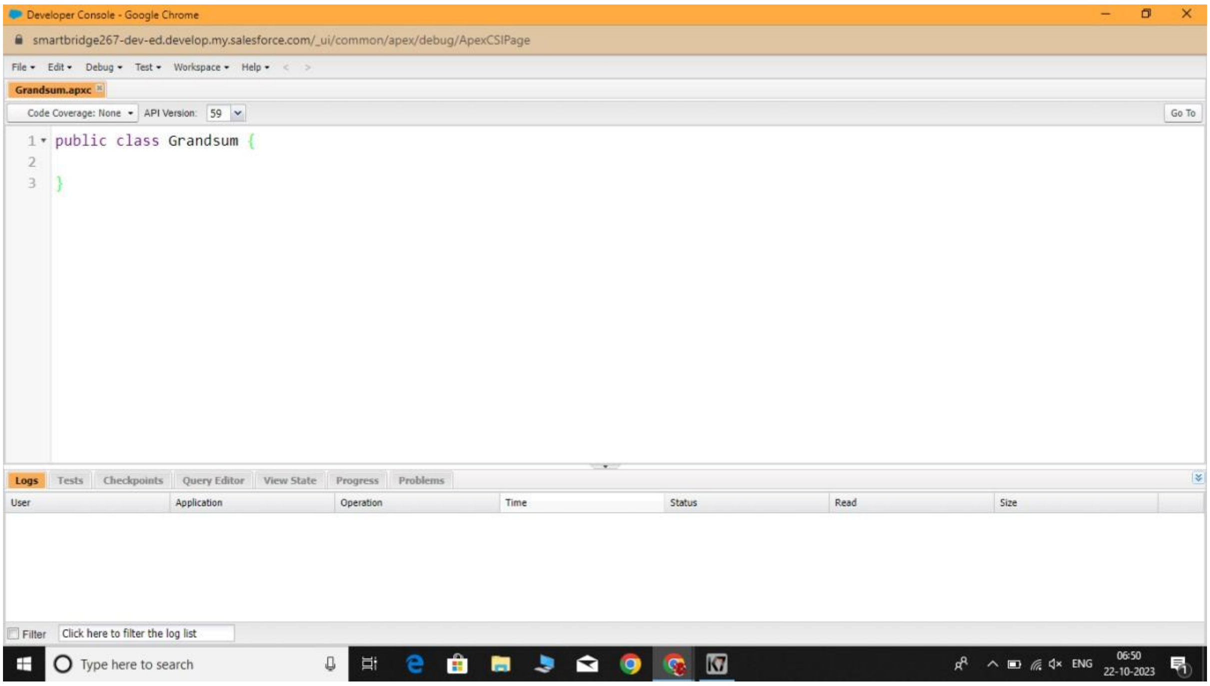
4.1 Apex Creation

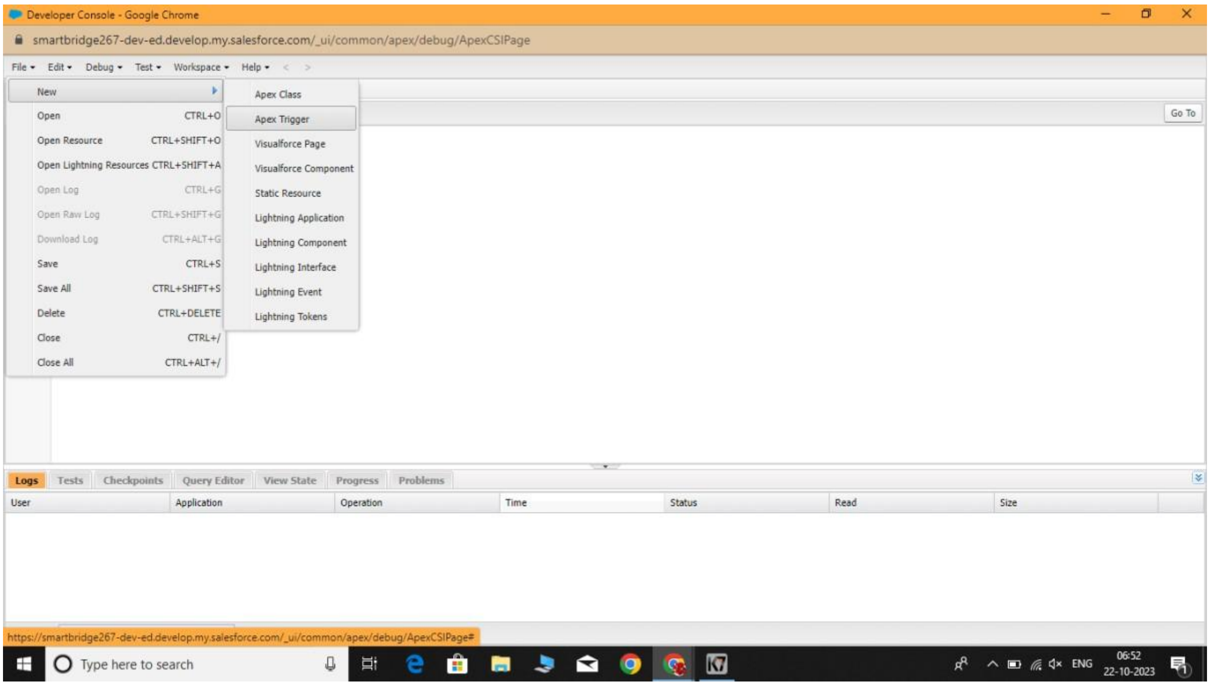
Apex is a programming language that's used within the Salesforce platform for developing custom functionality and automating business processes.

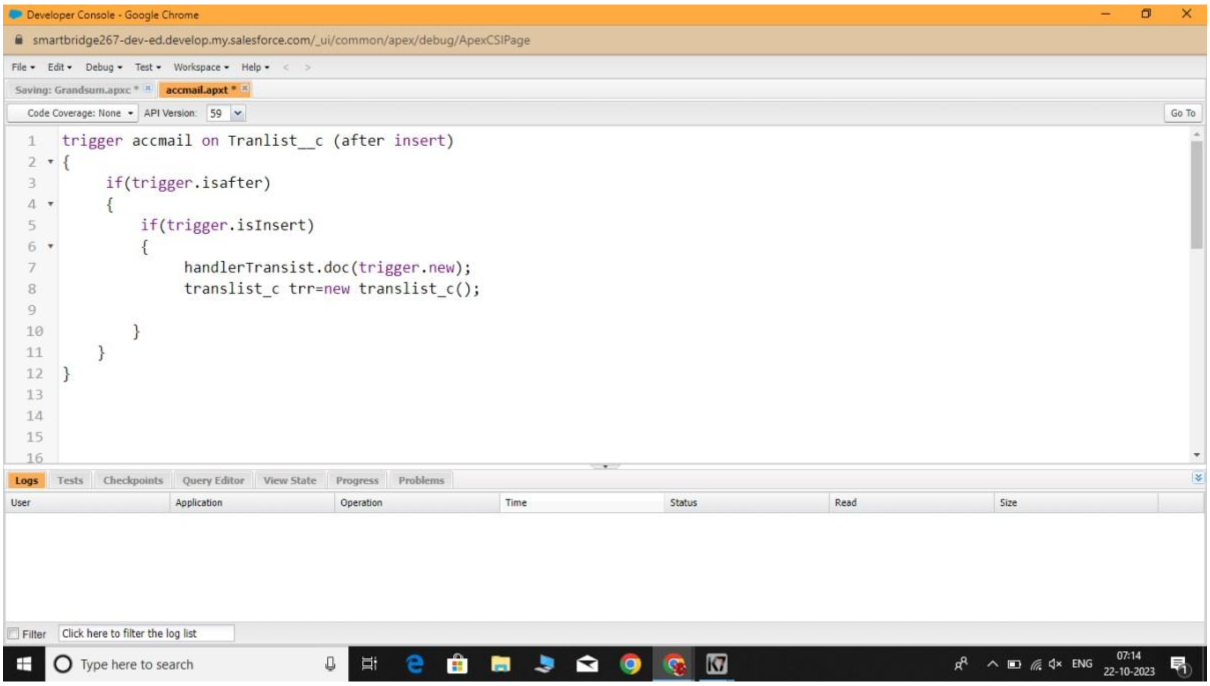
Apex is used to add custom code to Salesforce applications. It allows you to create complex business processes, automate workflows, and extend the functionality of your Salesforce organization.

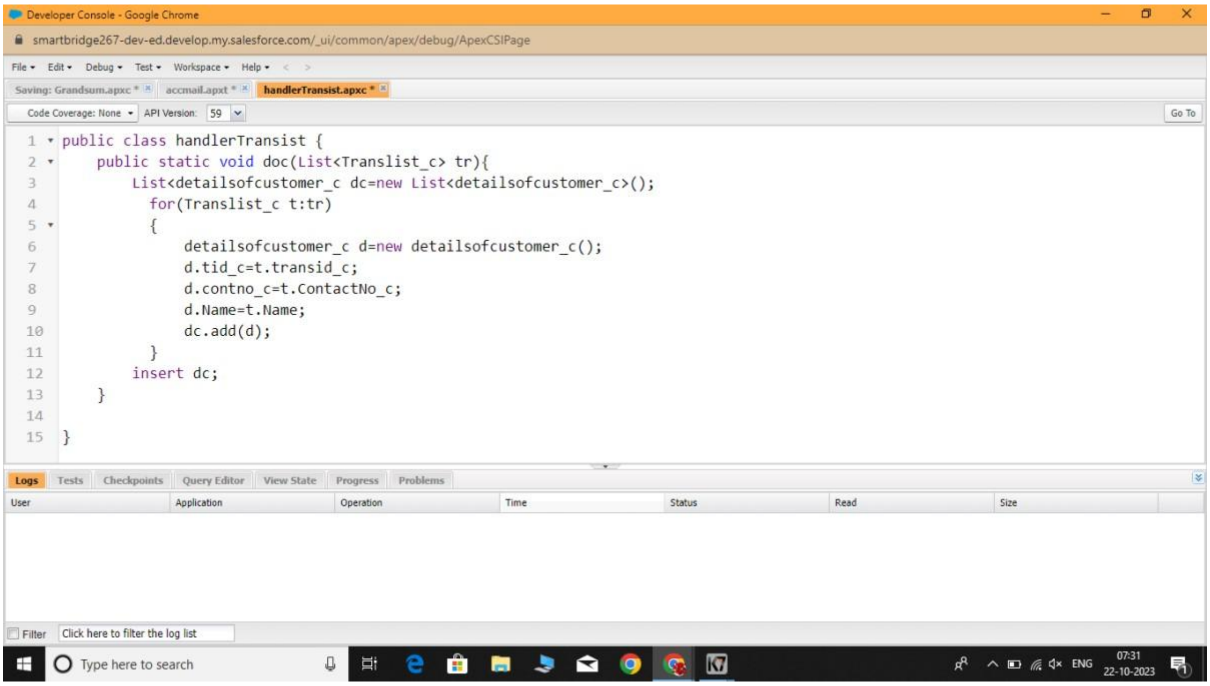


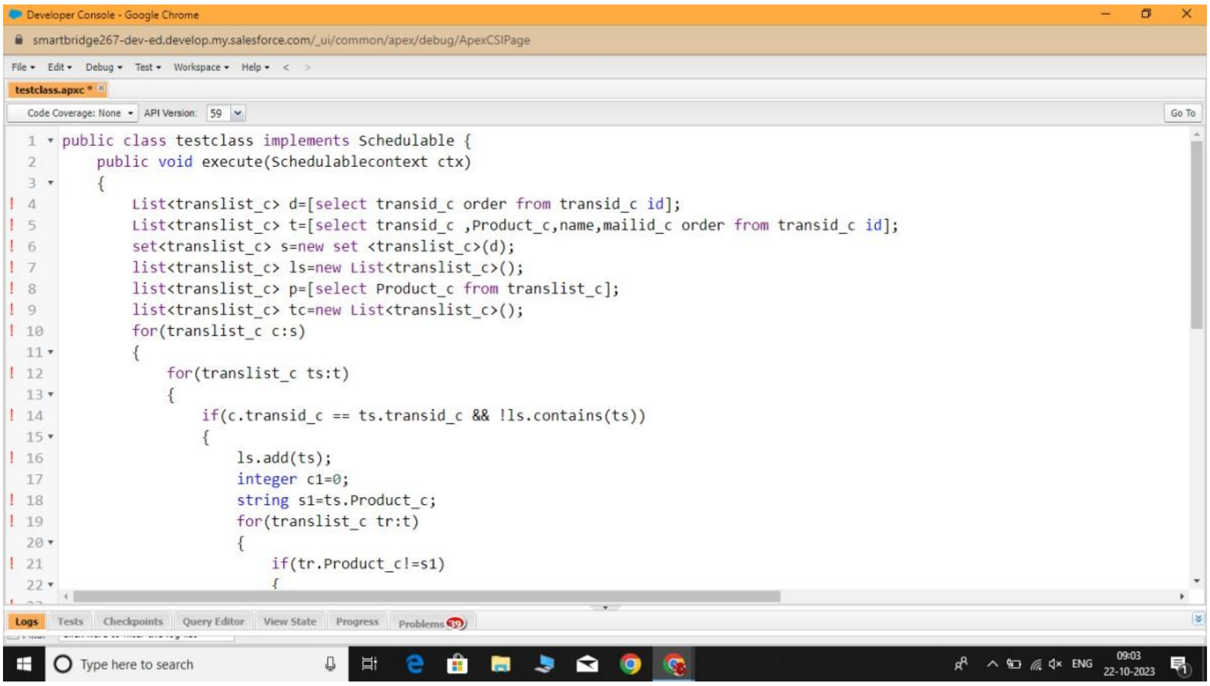



Developer Console - Google Chrome
smartbridge267-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage
File Edit Debug Test Workspace Help
Grandsum.apxc
Code Coverage: None API Version: 59
Go To
public class Grandsum {
}
Logs Tests Checkpoints Query Editor View State Progress Problems
User Application Operation Time Status Read Size
Filter Click here to filter the log list
Type here to search
ENG 06:50 22-10-2023


Developer Console - Google Chrome
smartbridge267-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage
File Edit Debug Test Workspace Help
New
Open CTRL+O
Open Resource CTRL+SHIFT+O
Open Lightning Resources CTRL+SHIFT+A
Open Log CTRL+G
Open Raw Log CTRL+SHIFT+G
Download Log CTRL+ALT+G
Save CTRL+S
Save All CTRL+SHIFT+S
Delete CTRL+DELETE
Close CTRL+/
Close All CTRL+ALT+/
Apex Class
Apex Trigger
Visualforce Page
Visualforce Component
Static Resource
Lightning Application
Lightning Component
Lightning Interface
Lightning Event
Lightning Tokens
Go To
Logs Tests Checkpoints Query Editor View State Progress Problems
User Application Operation Time Status Read Size
https://smartbridge267-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage#
Type here to search
ENG 06:52 22-10-2023

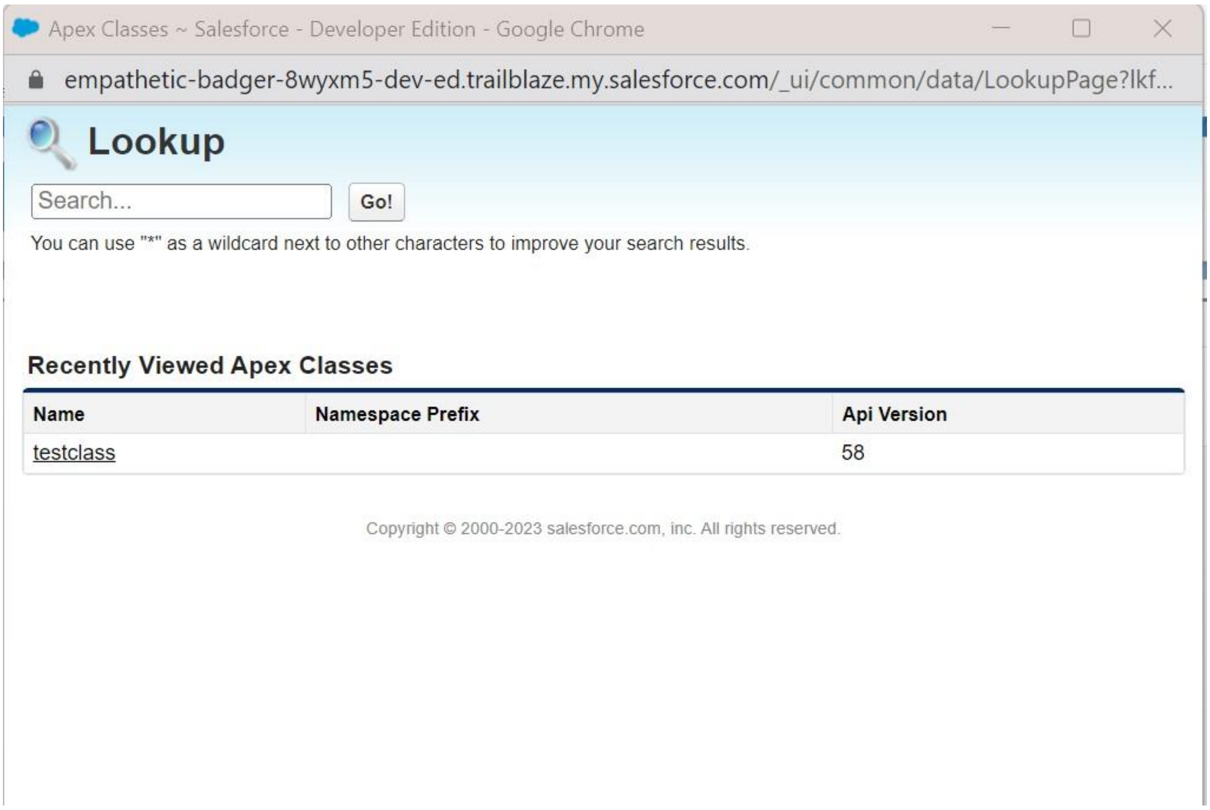

Developer Console - Google Chrome
smartbridge267-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage
File Edit Debug Test Workspace Help
Saving: Grandsum.apxc * accmail.apxt *
Code Coverage: None API Version: 59 Go To
trigger accmail on Tranlist__c (after insert)
{
if(trigger.isafter)
{
if(trigger.isInsert)
{
handlerTransist.doc(trigger.new);
translist_c trr=new translist_c();
}
}
}
Logs Tests Checkpoints Query Editor View State Progress Problems
User Application Operation Time Status Read Size
Filter Click here to filter the log list
Type here to search
ENG 07:14 22-10-2023


Developer Console - Google Chrome
smartbridge267-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage
File Edit Debug Test Workspace Help
Saving: Grandsum.apxc * accmail.apxt * handlerTransist.apxc *
Code Coverage: None API Version: 59 Go To
public class handlerTransist {
public static void doc(List<Translist_c> tr){
List<detailsofcustomer_c dc=new List<detailsofcustomer_c>();
for(Translist_c t:tr)
{
detailsofcustomer_c d=new detailsofcustomer_c();
d.tid_c=t.transid_c;
d.contno_c=t.ContactNo_c;
d.Name=t.Name;
dc.add(d);
}
insert dc;
}
}
Logs Tests Checkpoints Query Editor View State Progress Problems
User Application Operation Time Status Read Size
Filter Click here to filter the log list
Type here to search
ENG 07:31 22-10-2023

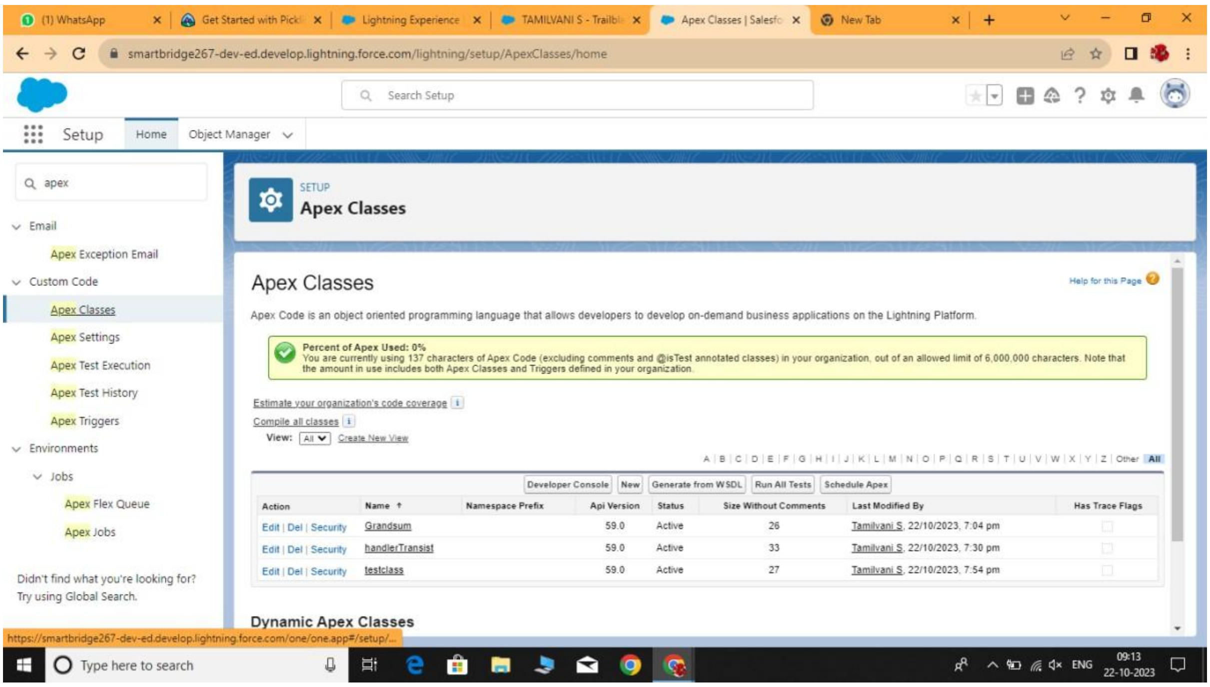


4.2 Apex Schedulers

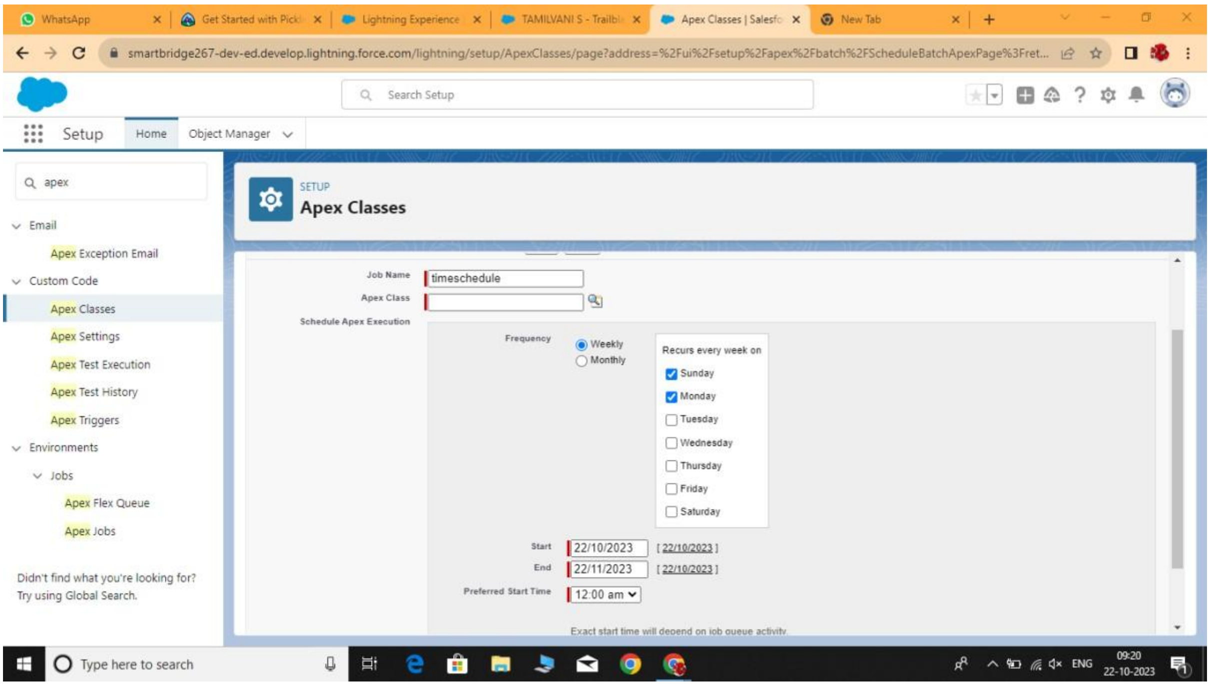
Apex schedulers in Salesforce are a way to automate the execution of Apex code at specified intervals. This allows you to perform tasks or processes on a scheduled basis without manual intervention. Apex schedulers are used to define scheduled jobs. These jobs consist of Apex code that you want to run at specific intervals.

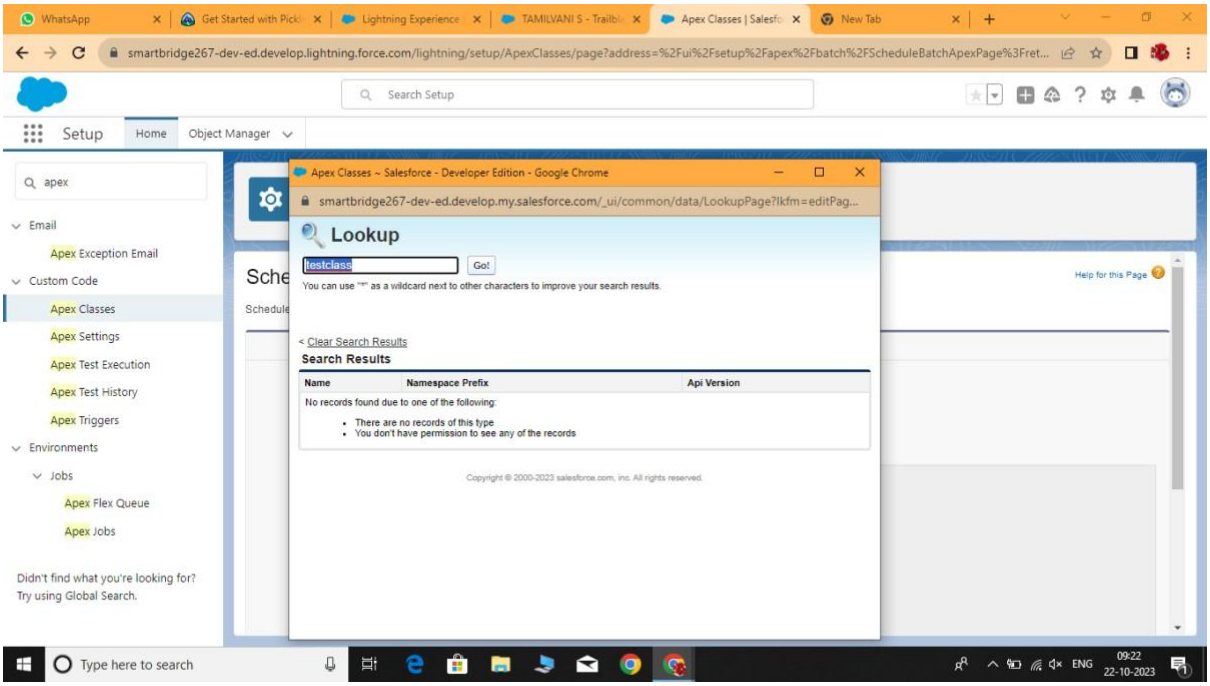


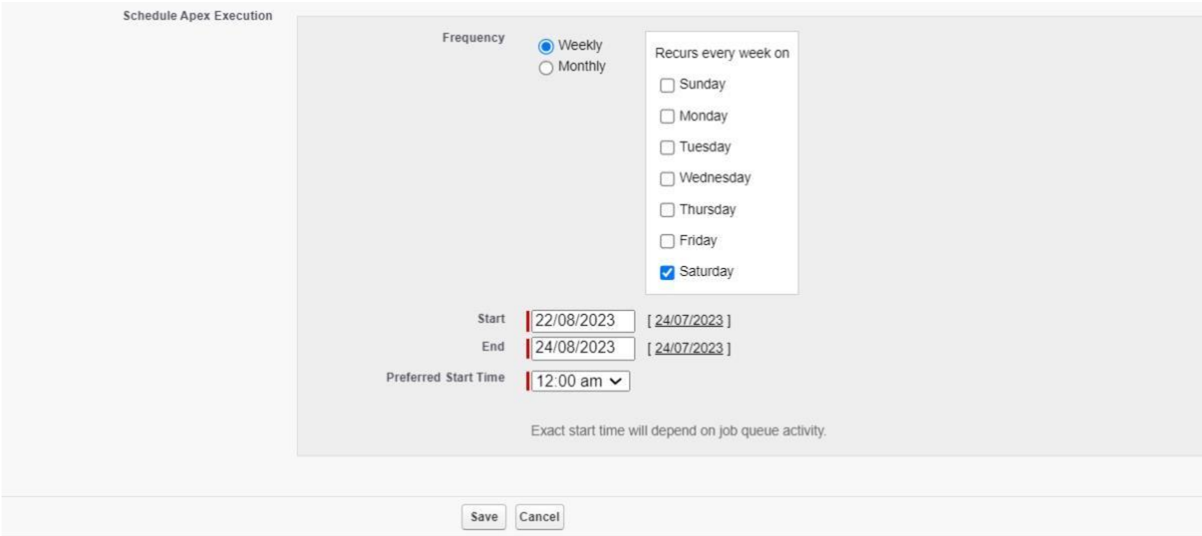
Apex Classes ~ Salesforce - Developer Edition - Google Chrome
empathetic-badger-8wyxm5-dev-ed.trailblaze.my.salesforce.com/_ui/common/data/LookupPage?lkf...
Lookup
Search...
Go!
You can use "*" as a wildcard next to other characters to improve your search results.
Recently Viewed Apex Classes
Name
Namespace Prefix
Api Version
testclass
58
Copyright © 2000-2023 salesforce.com, inc. All rights reserved.

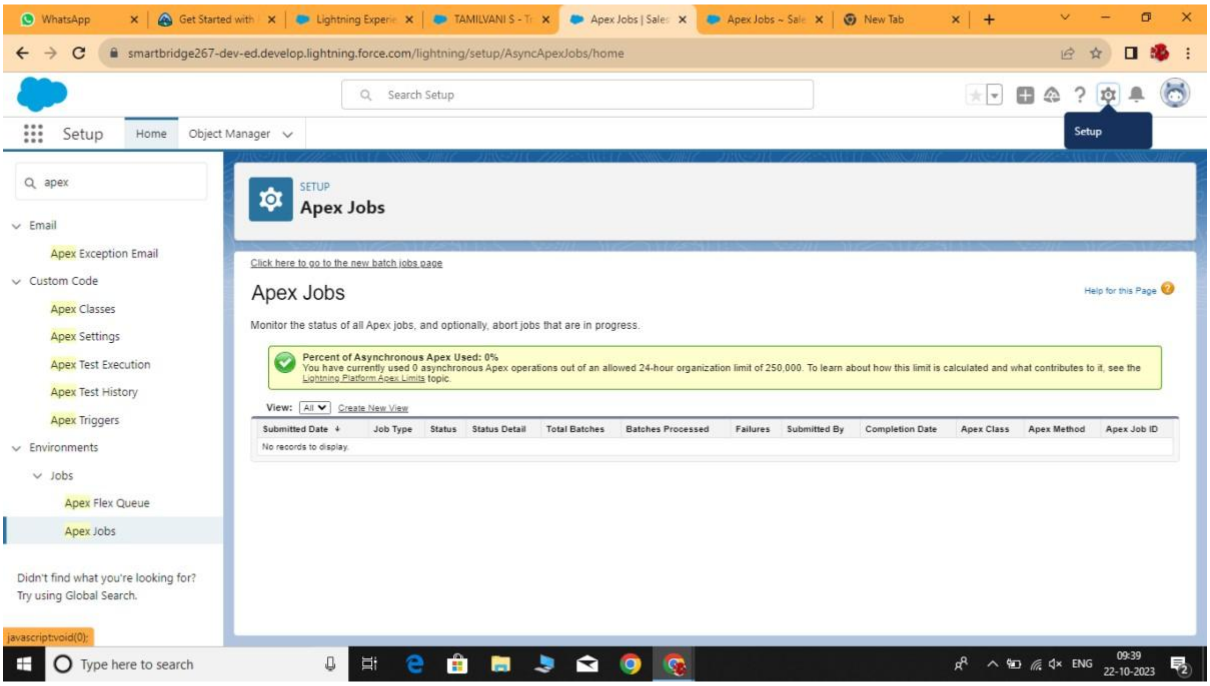


(1) WhatsApp
Get Started with Pickl
Lightning Experience
TAMILVANI S - Trailbl
Apex Classes | Salesfo
New Tab
smartbridge267-dev-ed.develop.lightning.force.com/lightning/setup/ApexClasses/home
Search Setup
Setup
Home
Object Manager
apex
Email
Apex Exception Email
Custom Code
Apex Classes
Apex Settings
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 Classes
Apex Classes
Help for this Page
Apex Code is an object oriented programming language that allows developers to develop on-demand business applications on the Lightning Platform.
Percent of Apex Used: 0%
You are currently using 137 characters of Apex Code (excluding comments and @isTest annotated classes) in your organization, out of an allowed limit of 6,000,000 characters. Note that the amount in use includes both Apex Classes and Triggers defined in your organization.
Estimate your organization's code coverage
Compile all classes
View: All
Create New View
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All
Developer Console
New
Generate from WSDL
Run All Tests
Schedule Apex
Action | Name | Namespace Prefix | Api Version | Status | Size Without Comments | Last Modified By | Has Trace Flags
Edit | Del | Security | Grandsum | 59.0 | Active | 26 | Tamilvani S, 22/10/2023, 7:04 pm
Edit | Del | Security | handlerTransist | 59.0 | Active | 33 | Tamilvani S, 22/10/2023, 7:30 pm
Edit | Del | Security | testclass | 59.0 | Active | 27 | Tamilvani S, 22/10/2023, 7:54 pm
Dynamic Apex Classes
https://smartbridge267-dev-ed.develop.lightning.force.com/one/one.app#/setup/...
Type here to search
ENG
09:13
22-10-2023

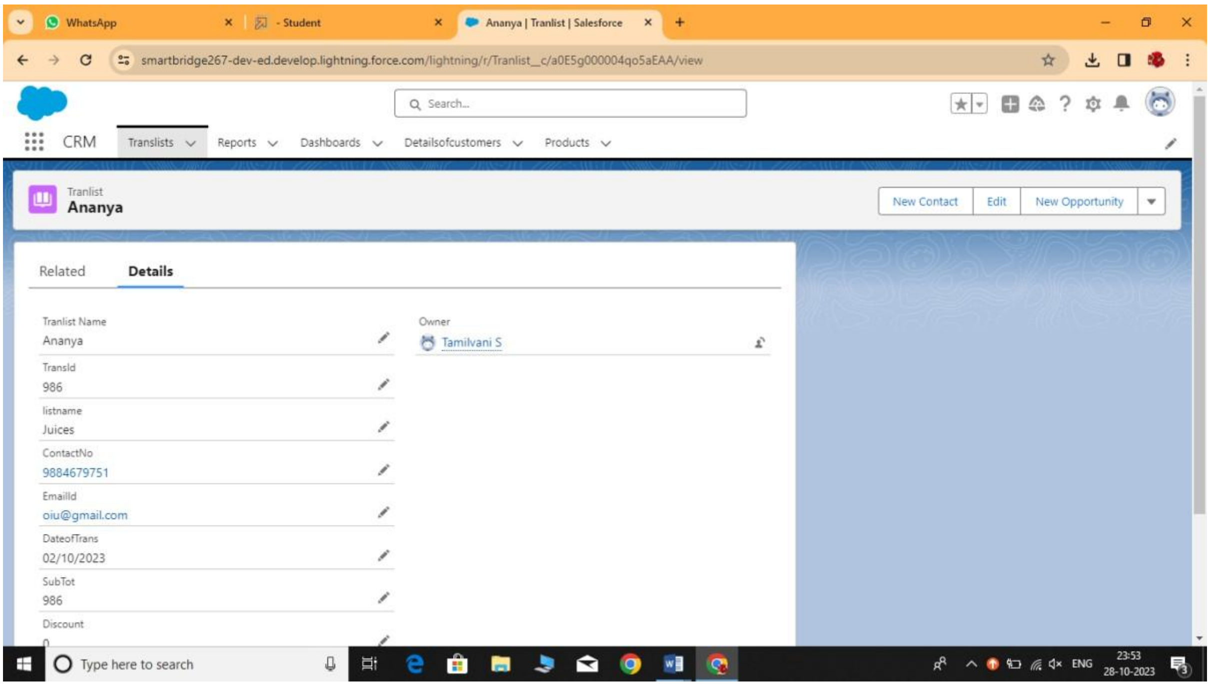

smartbridge267-dev-ed.develop.lightning.force.com/lightning/setup/ApexClasses/page?address=%2Fui%2Fsetup%2Fapex%2Fbatch%2FScheduleBatchApexPage%3Fret...
Setup
Apex Classes
Job Name
timeschedule
Apex Class
Schedule Apex Execution
Frequency
Weekly
Monthly
Recurs every week on
Sunday
Monday
Tuesday
Wednesday
Thursday
Friday
Saturday
Start
22/10/2023
End
22/11/2023
Preferred Start Time
12:00 am

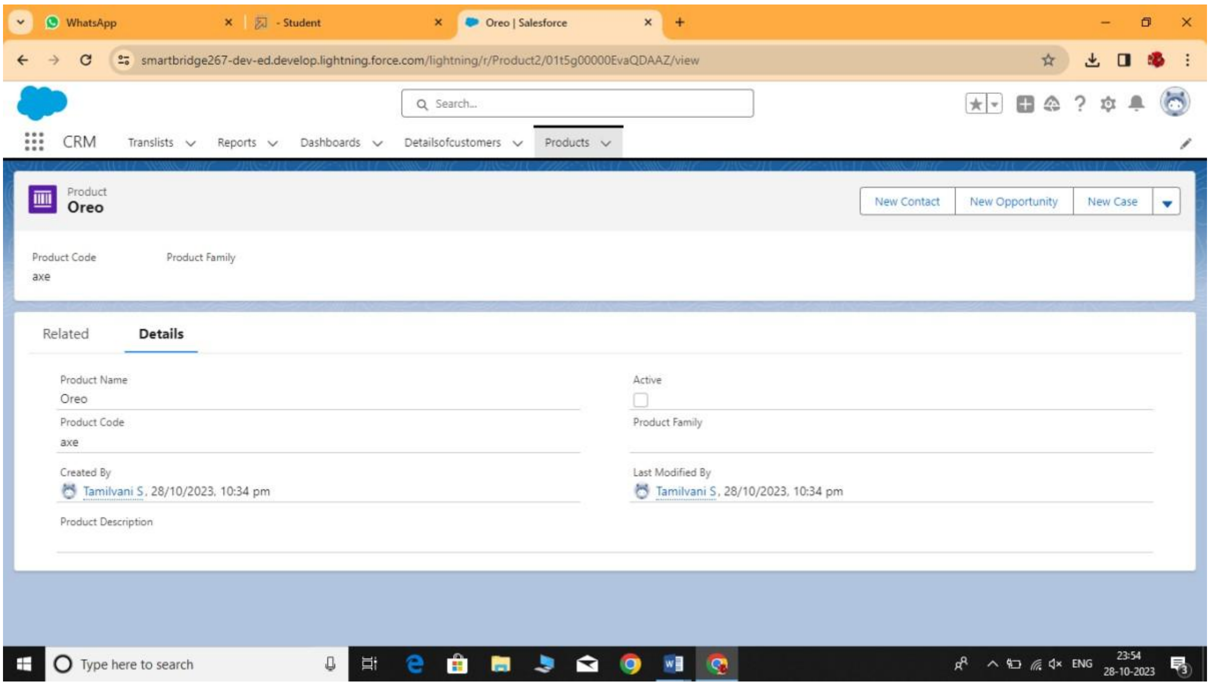

Apex Classes ~ Salesforce - Developer Edition - Google Chrome
smartbridge267-dev-ed.develop.my.salesforce.com/_ui/common/data/LookupPage?lkfm=editPag...
Lookup
testclass
Go!
You can use "*" as a wildcard next to other characters to improve your search results.
Clear Search Results
Search Results
Name
Namespace Prefix
Api Version
No records found due to one of the following:
There are no records of this type
You don't have permission to see any of the records

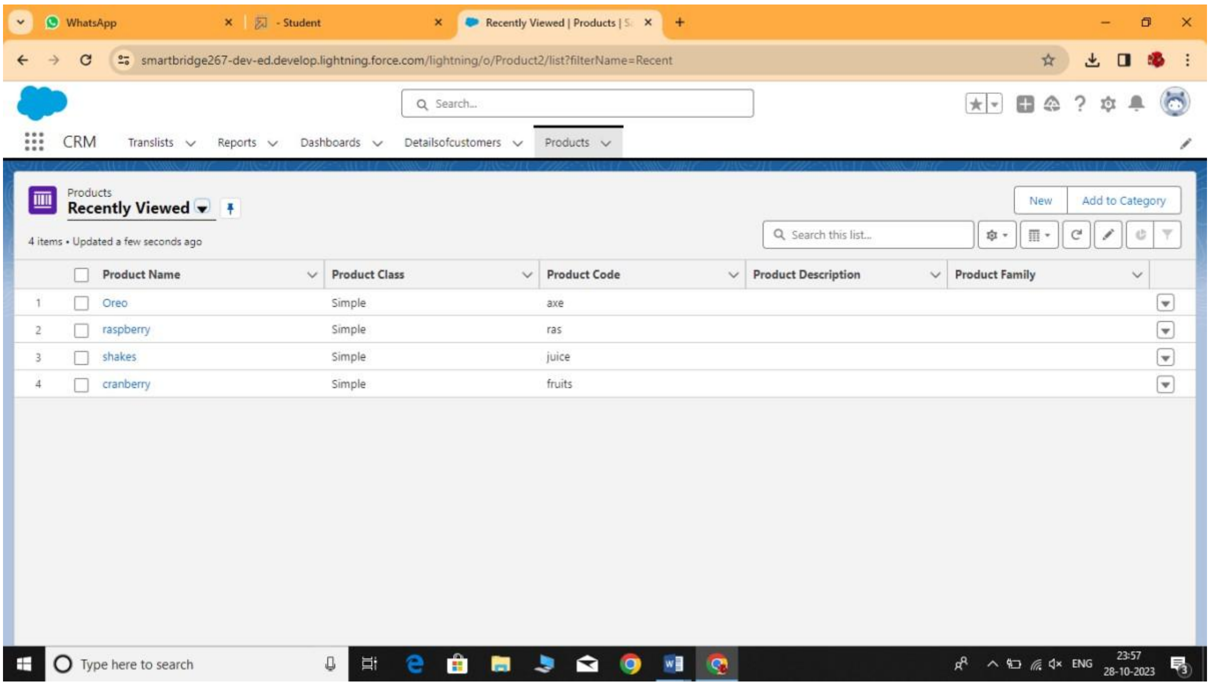

Schedule Apex Execution
Frequency
Weekly
Monthly
Recurs every week on
Sunday
Monday
Tuesday
Wednesday
Thursday
Friday
Saturday
Start
22/08/2023
[24/07/2023]
End
24/08/2023
[24/07/2023]
Preferred Start Time
12:00 am
Exact start time will depend on job queue activity.
Save
Cancel

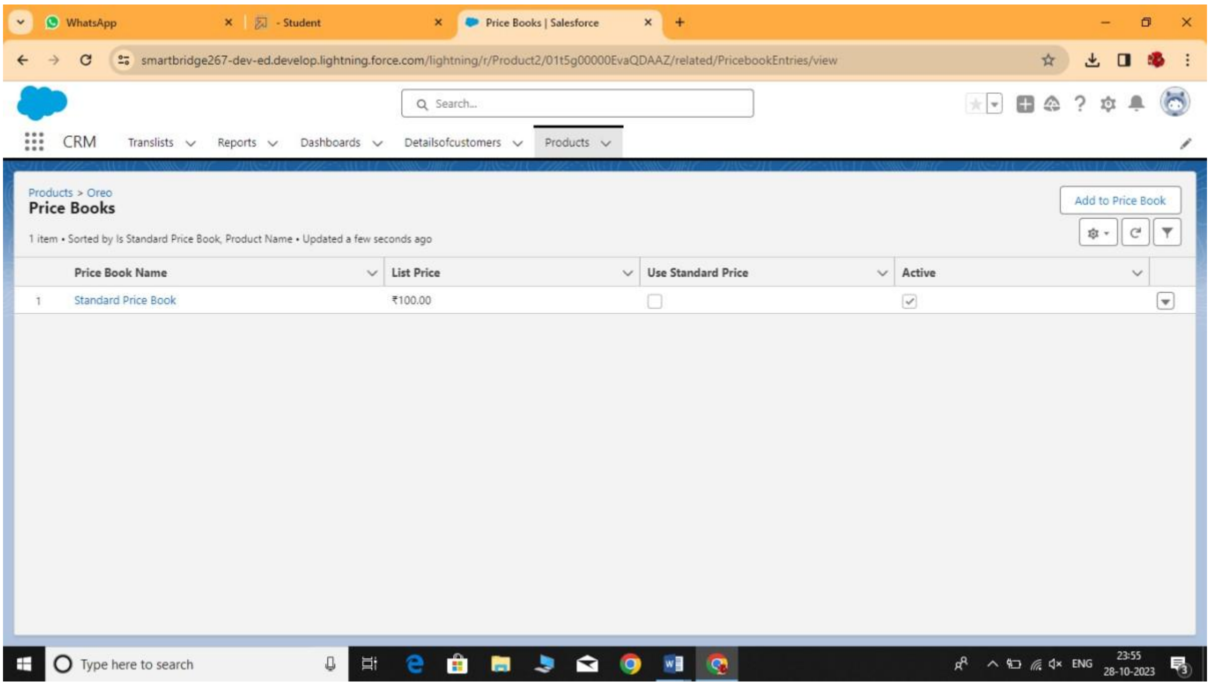

WhatsApp
New Tab
smartbridge267-dev-ed.develop.lightning.force.com/lightning/setup/AsyncApexJobs/home
Search Setup
Setup
Home
Object Manager
apex
Email
Apex Exception Email
Custom Code
Apex Classes
Apex Settings
Apex Test Execution
Apex Test History
Apex Triggers
Environments
Jobs
Apex Flex Queue
Apex 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%
You have currently used 0 asynchronous Apex operations out of an allowed 24-hour organization limit of 250,000. To learn about how this limit is calculated and what contributes to it, see the Lightning Platform Apex Limits topic.
View: All
Create New View
Submitted Date
Job Type
Status
Status Detail
Total Batches
Batches Processed
Failures
Submitted By
Completion Date
Apex Class
Apex Method
Apex Job ID
No records to display.
Type here to search
ENG
09:39
22-10-2023

Final Views


WhatsApp
- Student
Ananya | Tranlist | Salesforce
smartbridge267-dev-ed.develop.lightning.force.com/lightning/r/Tranlist__c/a0E5g000004qo5aEAA/view
Search...
CRM
Translists
Reports
Dashboards
Detailsofcustomers
Products
Tranlist
Ananya
New Contact
Edit
New Opportunity
Related
Details
Tranlist Name
Ananya
Owner
Tamilvani S
TransId
986
listname
Juices
ContactNo
9884679751
EmailId
oiu@gmail.com
DateofTrans
02/10/2023
SubTot
986
Discount
Type here to search
ENG
23:53
28-10-2023


WhatsApp
- Student
Oreo | Salesforce
smartbridge267-dev-ed.develop.lightning.force.com/lightning/r/Product2/01t5g00000EvaQDAAZ/view
Search...
CRM
Translists
Reports
Dashboards
Detailsofcustomers
Products
Product
Oreo
New Contact
New Opportunity
New Case
Product Code
axe
Product Family
Related
Details
Product Name
Oreo
Active
Product Code
axe
Product Family
Created By
Tamilvani S, 28/10/2023, 10:34 pm
Last Modified By
Tamilvani S, 28/10/2023, 10:34 pm
Product Description
Type here to search
ENG
23:54
28-10-2023


smartbridge267-dev-ed.develop.lightning.force.com/lightning/o/Product2/list?filterName=Recent
Products
Recently Viewed
4 items • Updated a few seconds ago
New
Add to Category
Product Name
Product Class
Product Code
Product Description
Product Family
Oreo
Simple
axe
raspberry
Simple
ras
shakes
Simple
juice
cranberry
Simple
fruits


smartbridge267-dev-ed.develop.lightning.force.com/lightning/r/Product2/01t5g00000EvaQDAAZ/related/PricebookEntries/view
Products > Oreo
Price Books
1 item • Sorted by Is Standard Price Book, Product Name • Updated a few seconds ago
Add to Price Book
Price Book Name
List Price
Use Standard Price
Active
Standard Price Book
₹100.00

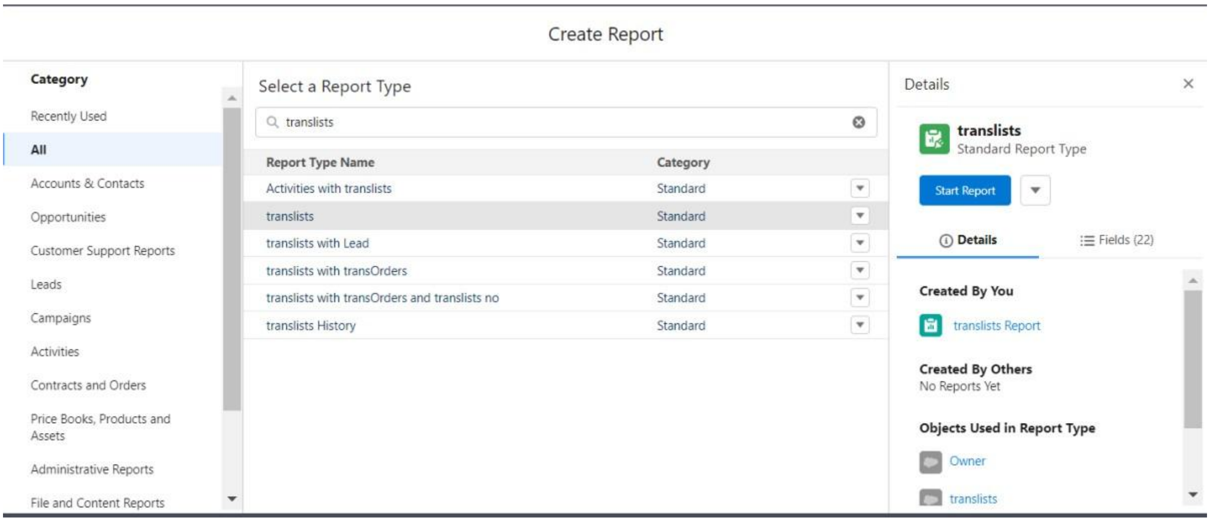
CHAPTER-5

REPORTS & DASHBOARD

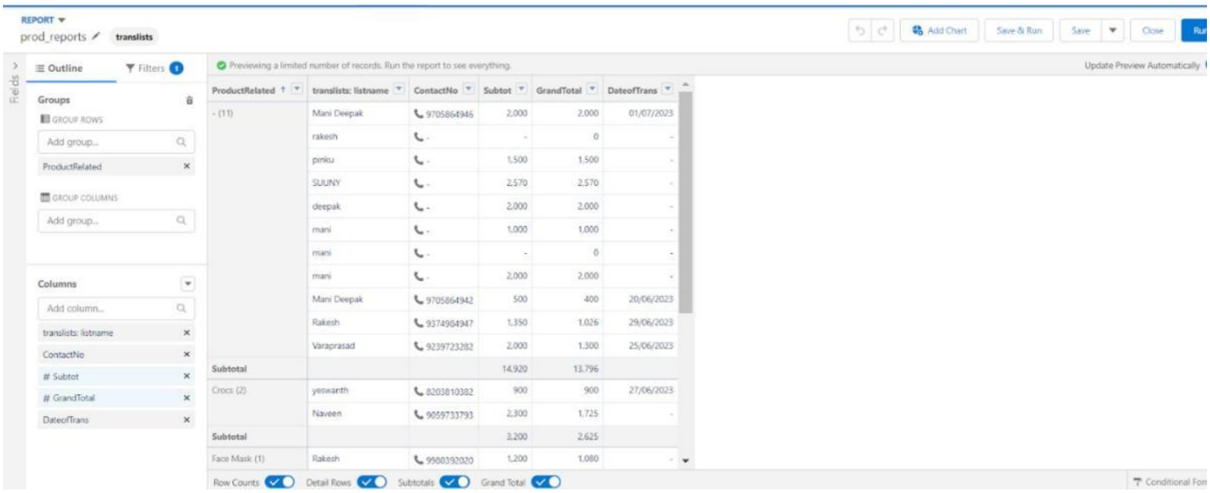
5.1 Reports

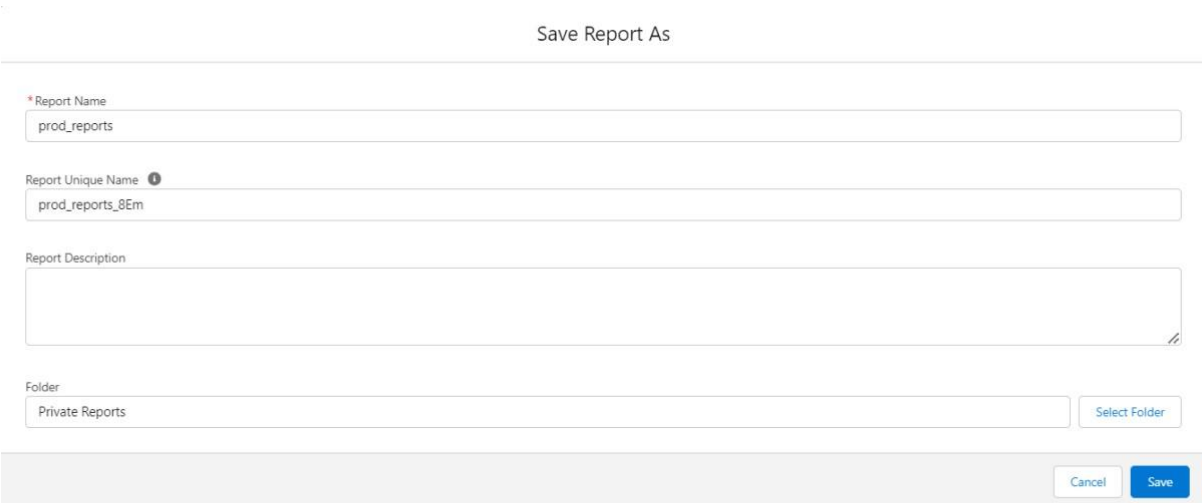
A Salesforce report is a list of data generated based on filter criteria. Salesforce Reports helped us predict trends and gives us the advantage to increase profits.

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



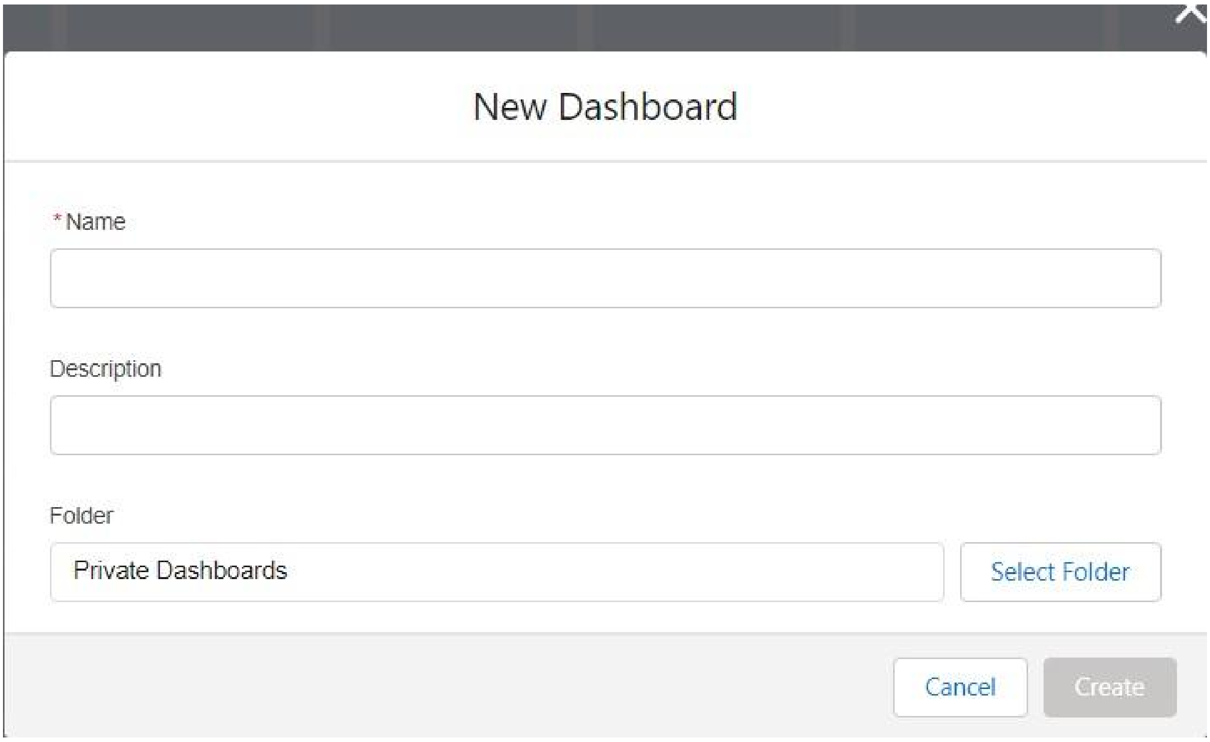

Save Report
* Report Name
translists Report
Report Unique Name
translists_Report_L2W
Report Description
Folder
Private Reports
Select Folder
Cancel
Save

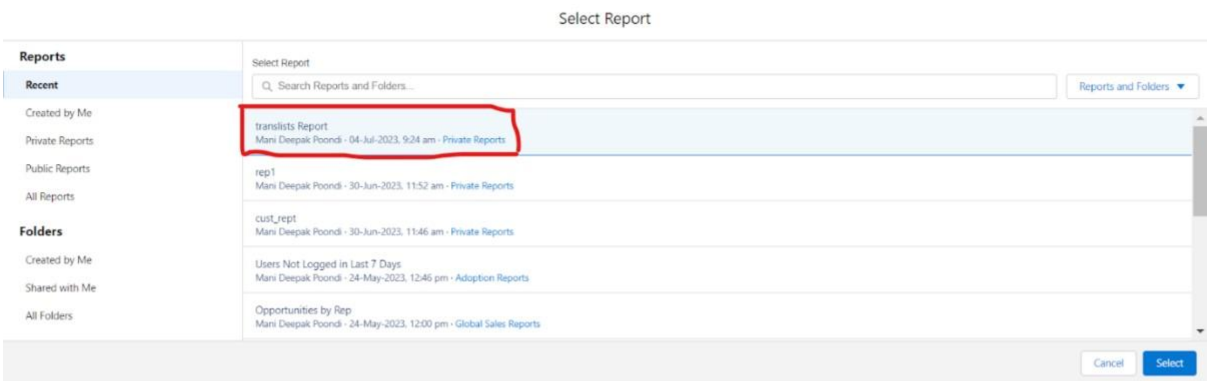

REPORT
prod_reports
translists
Add Chart
Save & Run
Save
Close
Outline
Filters 1
Previewing a limited number of records. Run the report to see everything.
Update Preview Automatically
Groups
GROUP ROWS
Add group...
ProductRelated
GROUP COLUMNS
Add group...
Columns
Add column...
translists: listname
ContactNo
Subtot
GrandTotal
DateofTrans
ProductRelated | translists: listname | ContactNo | Subtot | GrandTotal | DateofTrans
- (11) | Mani Deepak | 9705864946 | 2,000 | 2,000 | 01/07/2023
rakesh | - | - | 0 | -
pinku | - | 1,500 | 1,500 | -
SUUNY | - | 2,570 | 2,570 | -
deepak | - | 2,000 | 2,000 | -
mani | - | 1,000 | 1,000 | -
mani | - | - | 0 | -
mani | - | 2,000 | 2,000 | -
Mani Deepak | 9705864942 | 500 | 400 | 20/06/2023
Rakesh | 9374984947 | 1,350 | 1,026 | 29/06/2023
Varaprasad | 9239723282 | 2,000 | 1,300 | 25/06/2023
Subtotal | 14,920 | 13,796
Crocs (2) | yeswanth | 8203810382 | 900 | 900 | 27/06/2023
Naveen | 9059733793 | 2,300 | 1,725 | -
Subtotal | 3,200 | 2,625
Face Mask (1) | Rakesh | 9980392020 | 1,200 | 1,080 | -
Row Counts
Detail Rows
Subtotals
Grand Total
Conditional Fon

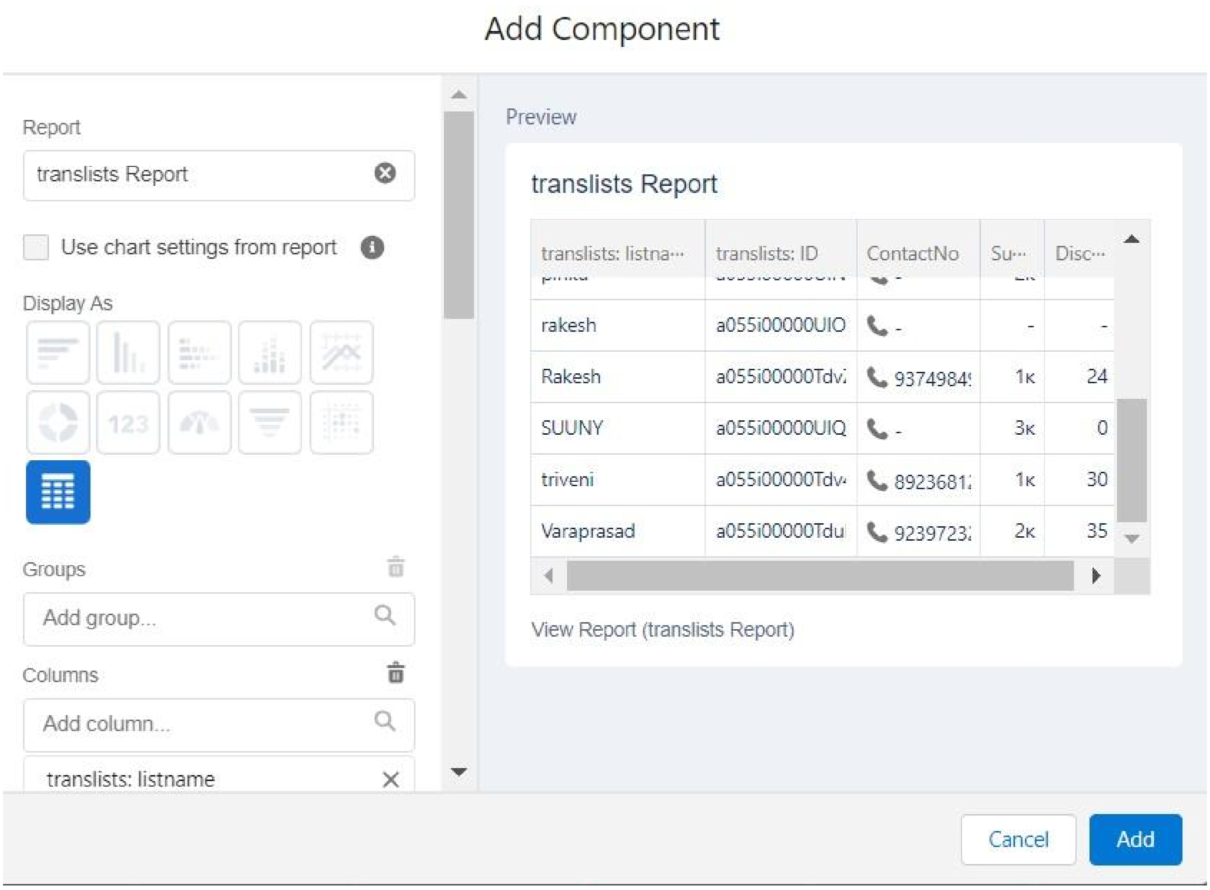

Save Report As
* Report Name
prod_reports
Report Unique Name
prod_reports_8Em
Report Description
Folder
Private Reports
Select Folder
Cancel
Save

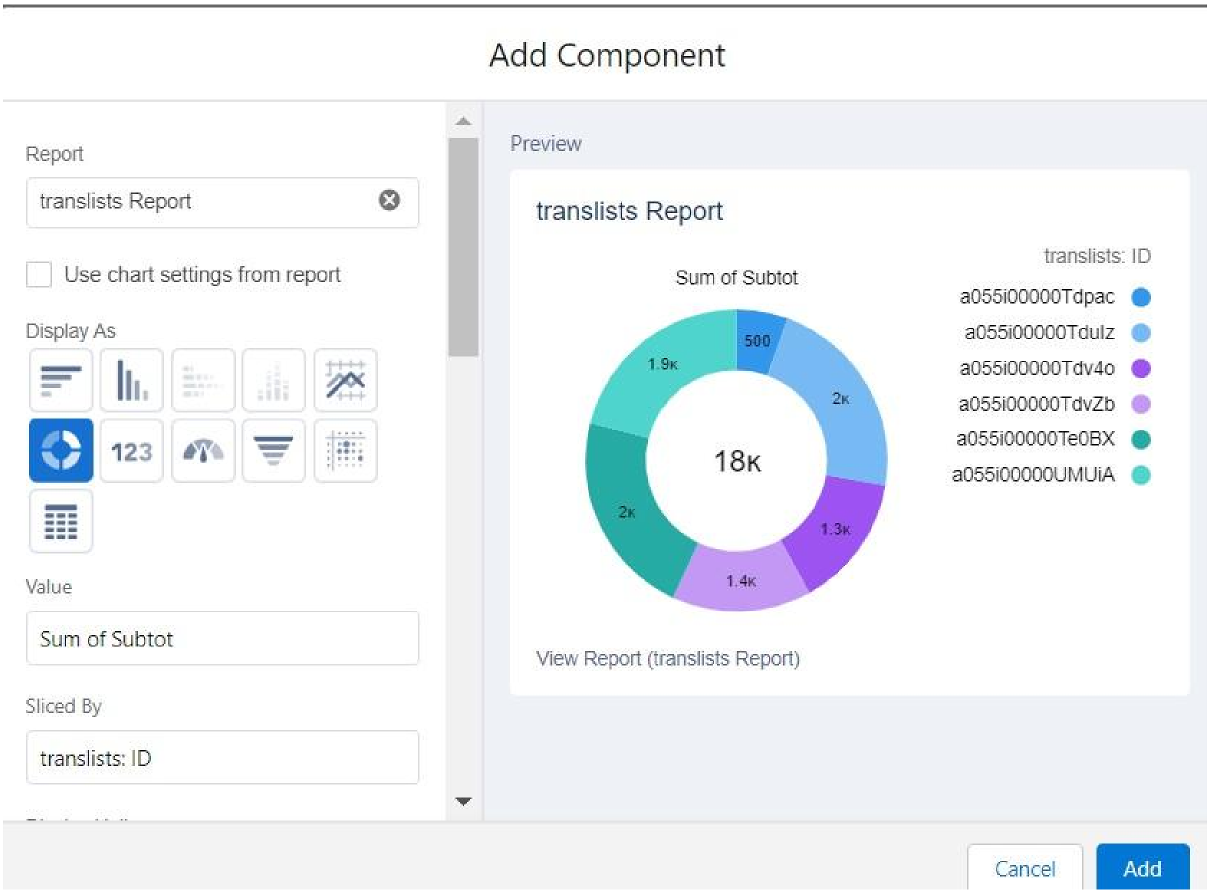
5.2 Dashboard

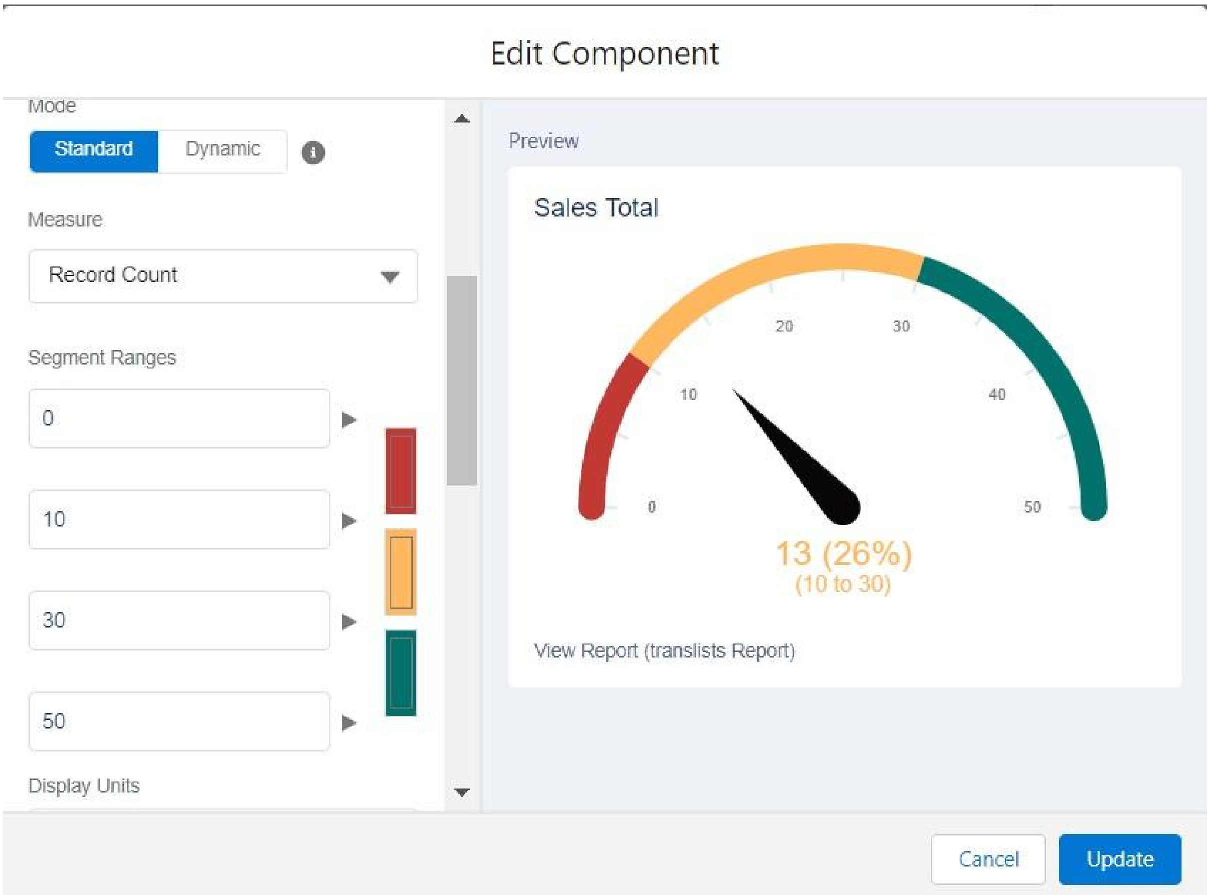
A dashboard provides an interactive visual display of key metrics and trends. Multiple dashboard components can be shown together on a single dashboard layout, creating rich visual displays of multiple reports that have a common theme. **Dashboard on Translist object**



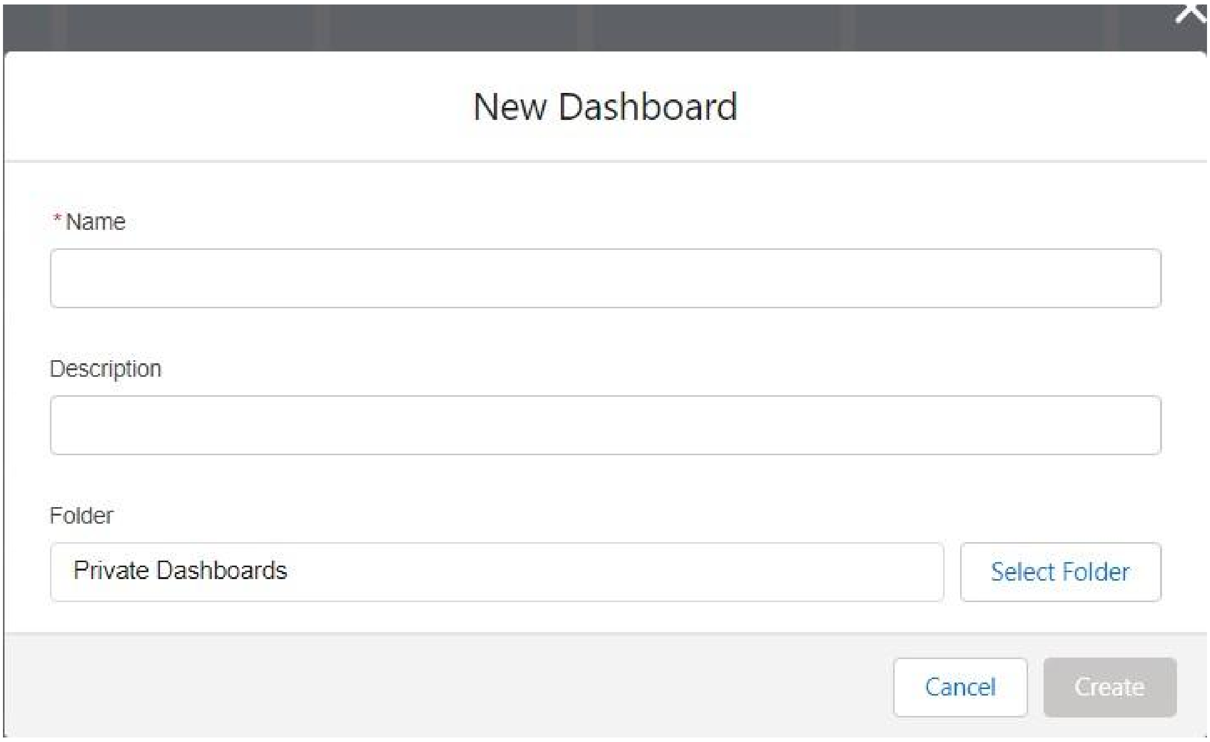


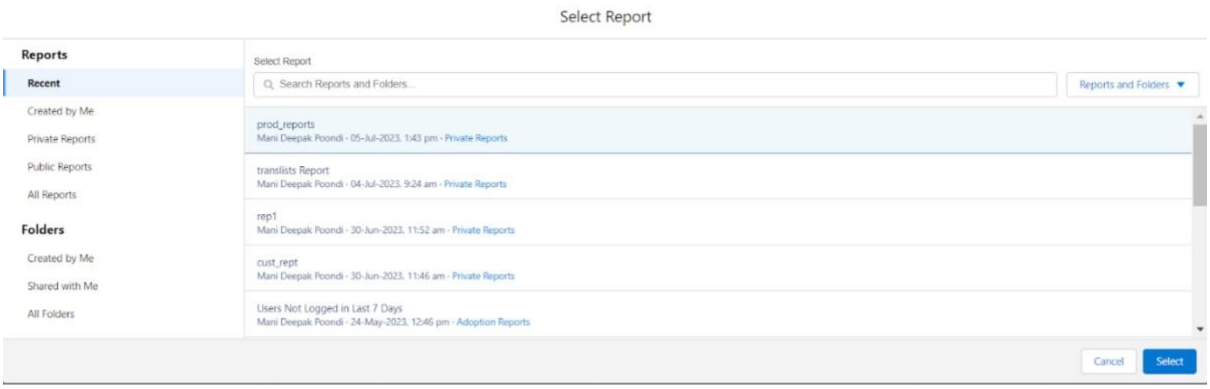

Add Component
Report
translists Report
Use chart settings from report
Display As
123
Groups
Add group...
Columns
Add column...
translists: listname
Preview
translists Report
translists: listna···
translists: ID
ContactNo
Su···
Disc···
rakesh
a055i00000UIO
Rakesh
a055i00000Tdv.
9374984!
1K
24
SUUNY
a055i00000UIQ
3K
0
triveni
a055i00000Tdv·
8923681.
1K
30
Varaprasad
a055i00000Tdu
9239723.
2K
35
View Report (translists Report)
Cancel
Add

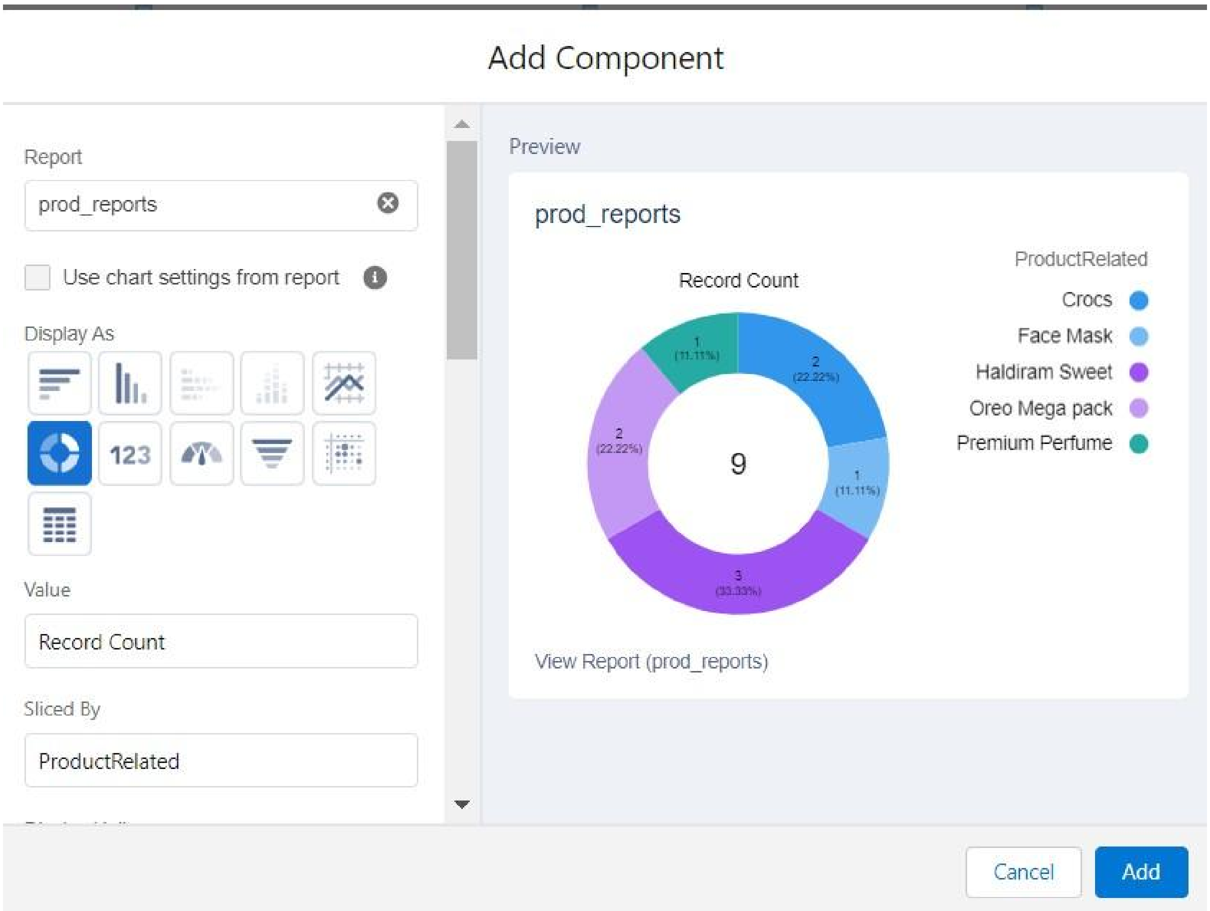

Add Component
Report
translists Report
Use chart settings from report
Display As
123
Value
Sum of Subtot
Sliced By
translists: ID
Preview
translists Report
Sum of Subtot
500
2K
1.3K
1.4K
2K
1.9K
18K
translists: ID
a055i00000Tdpac
a055i00000Tdulz
a055i00000Tdv4o
a055i00000TdvZb
a055i00000Te0BX
a055i00000UMUiA
View Report (translists Report)
Cancel
Add

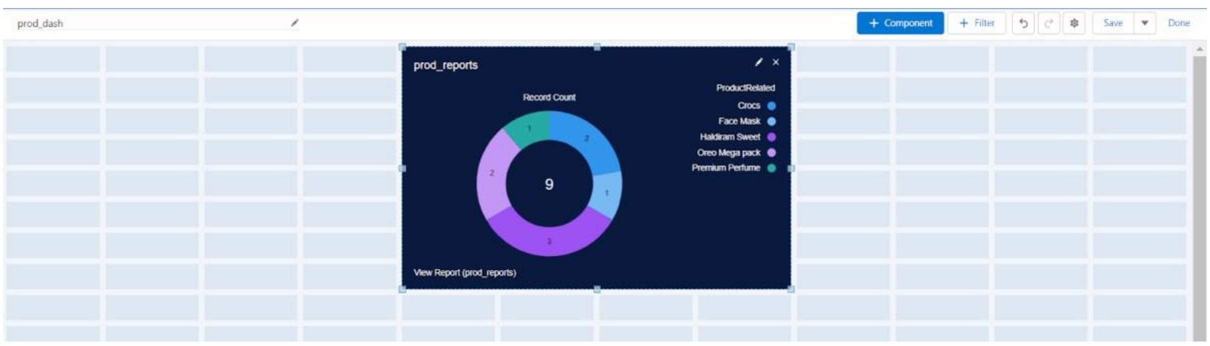


Dashboard on Item Object




Select Report
Reports
Recent
Created by Me
Private Reports
Public Reports
All Reports
Folders
Created by Me
Shared with Me
All Folders
Select Report
Search Reports and Folders...
Reports and Folders
prod_reports
Mani Deepak Poondi · 05-Jul-2023, 1:43 pm · Private Reports
translists Report
Mani Deepak Poondi · 04-Jul-2023, 9:24 am · Private Reports
rep1
Mani Deepak Poondi · 30-Jun-2023, 11:52 am · Private Reports
cust_rept
Mani Deepak Poondi · 30-Jun-2023, 11:46 am · Private Reports
Users Not Logged in Last 7 Days
Mani Deepak Poondi · 24-May-2023, 12:46 pm · Adoption Reports
Cancel
Select


Add Component
Report
prod_reports
Use chart settings from report
Display As
123
Value
Record Count
Sliced By
ProductRelated
Preview
prod_reports
Record Count
ProductRelated
Crocs
Face Mask
Haldiram Sweet
Oreo Mega pack
Premium Perfume
9
View Report (prod_reports)
Cancel
Add


prod_dash
+ Component
+ Filter
Save
Done
prod_reports
Record Count
ProductRelated
Crocs
Face Mask
Haldiram Sweet
Oreo Mega pack
Premium Perfume
9
View Report (prod_reports)

CHAPTER 6

CONCLUSION

In conclusion, the development of an employee CRM applications for corporates is a critical step towards streamlining and enhancing the E-Commerce management process within organizations. This application serves as a centralized, efficient, and user-friendly tool for managing employee requests, approvals, and associated processes.

In building an employee CRM application, it's essential to engage relevant stakeholders, including HR, finance, and IT teams, to ensure that the application aligns with organizational goals and requirements. Furthermore, thorough testing and training should be conducted to guarantee a smooth and successful implementation.

By addressing these key points and creating a tailored CRM application that aligns with the unique needs and policies of the corporate, organizations can enhance their E-Commerce management processes, improve cost control, and provide a more satisfying experience for employees and administrators alike.

PROJECT DEMONSTRATION

Github:

https://github.com/Tamil0101/NMPROJECT

Demo link:

https://youtube.com/@pavithrakannan3897?si=quN6OeA0nxv74cbp