

Project Report Template

Retail Management Application Using Sales force

1. Introduction :

Salesforce is the world's largest cloud Customer Relationship Management (CRM), designed to help you build client interactions, develop apps, and integrate with other systems. If you're an IT professional looking for a way to specialize in a particular field with promising career possibilities, Salesforce is a go-to choice today.

1.1 Overview:

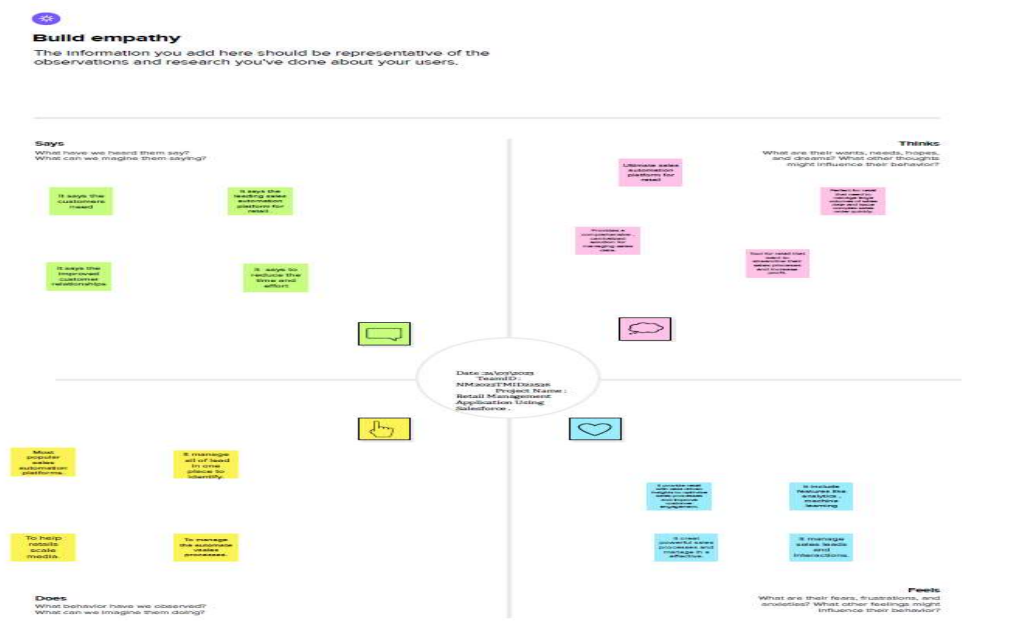
Customer Engagement: Salesforce provides a unified platform for managing customer interactions, which enables retailers to deliver personalized shopping experiences. With features like Einstein AI and Live Agent, retailers can provide real-time assistance and support to customers, resulting in increased customer loyalty.

1.2 Purpose :

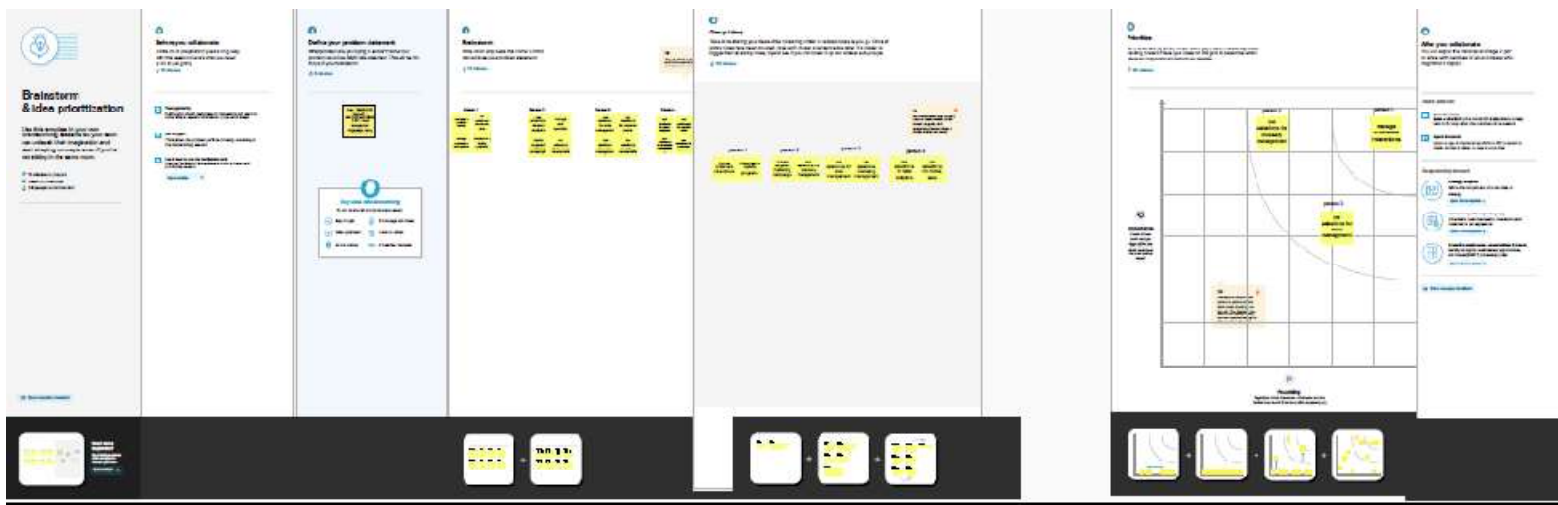
- **Automated Sales Processes:** With Salesforce, you can automate your sales processes and make them more efficient. ...
- **Improved Customer Relationships:** With Salesforce, you can keep track of your customers' movements and interactions in a centralized location.

1. Problem Definition & Design Thinking :

1.1 Empathy Map :



1.2 Ideation & Brainstorming Map :



3.Result :

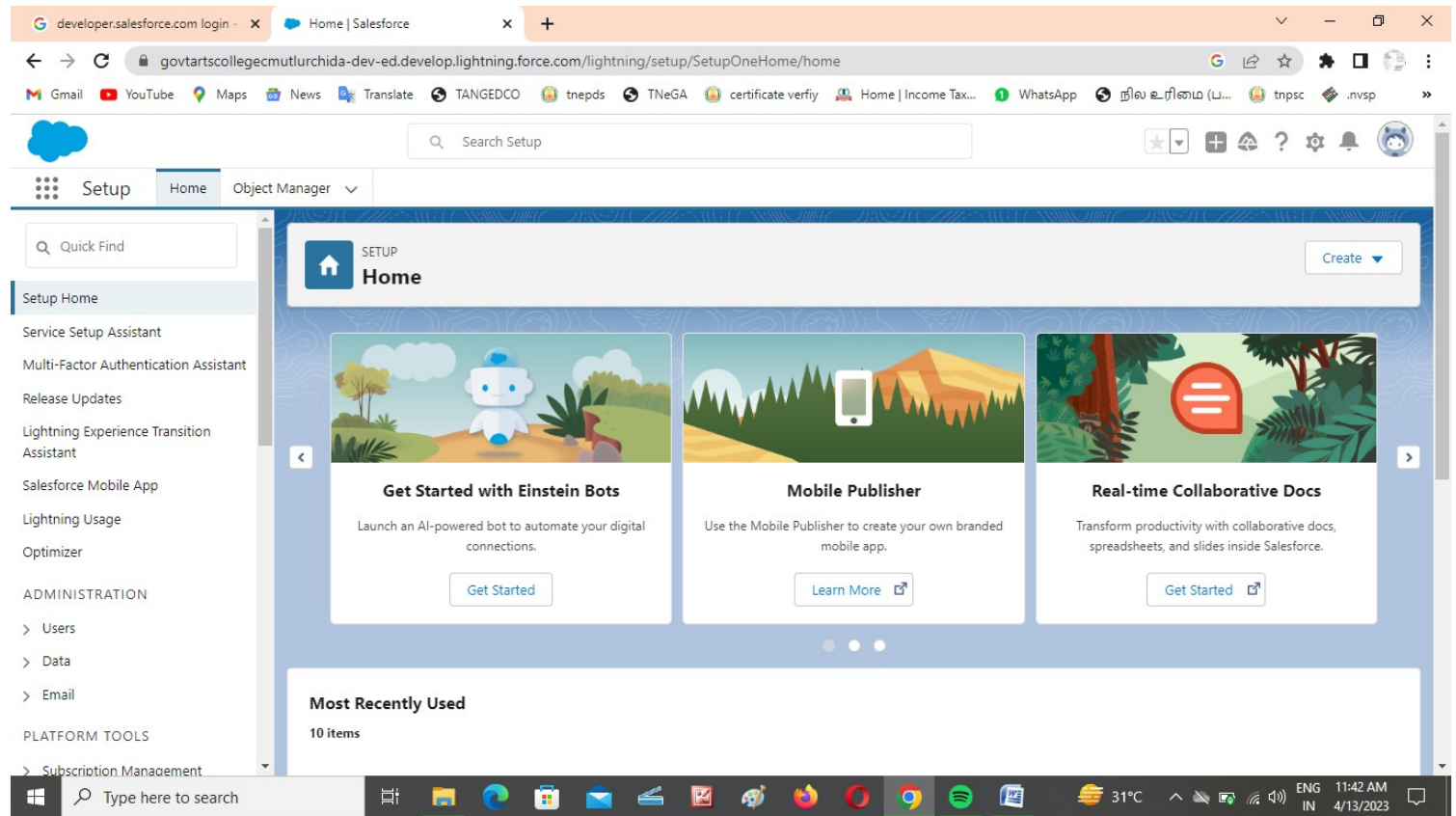
3.1 Data Model :

| Object Name | Fields in the Object | |
|--------------------|----------------------|--------------|
| Dispatch \Tracking | Field Label | Data Type |
| | Dispatch \Tracking | Checkbox |
| | Dispatch \Tracking | Text |
| Warehouses | Field Label | Data Type |
| | Warehouses | Product Name |
| Contact | Field Label | Data Type |
| | Contact | Formula |

3.2 Activity& Screenshot :

Milestone-1 :

Activity 1 :



Milestone-2 :

Actitivity-1 :

Creation of Object Dispatch/ Tracking

Dispatch\Tracking | Salesforce x New Tab x +

govtartscollegemutlurchida-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003ox5J/Details/view

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Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Dispatch\Tracking

Details Edit Delete

Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts

Details

Description

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

Type here to search

30°C ENG IN 10:36 AM 4/12/2023

Activity-2 :

Creation of Fields on Dispatch/Tracking :

Dispatch\Tracking | Salesforce x New Tab x +

govtartscollegemutlurchida-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003ox5J/FieldsAndRelationships/view

Gmail YouTube Maps News Translate TANGEDCO tnepts TNeGA certificate verify Home | Income Tax... WhatsApp நிலை உரிமை (ப... tnpSC .nvsp

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Dispatch\Tracking

Fields & Relationships 6 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|------------------------|-----------------|-------------------------|-------------------|---------|
| checkbox | account__c | Master-Detail(checkbox) | | ✓ |
| Conversation | Conversation__c | Master-Detail(Contact) | | ✓ |
| Created By | CreatedById | Lookup(User) | | |
| Dispatch\Tracking Name | Name | Text(80) | | ✓ |

Milestone-3 :

Activity-1

Creation of Relationship Between Object :

The screenshot shows the Salesforce Setup interface for the 'Dispatch\Tracking' object. The 'Fields & Relationships' section is active, displaying a list of 6 fields sorted by Field Label. The fields are:

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|------------------------|------------------|-------------------------|-------------------|---------|
| checkbox | account__c | Master-Detail(checkbox) | | ✓ |
| Conversation | Conversation__c | Master-Detail(Contact) | | ✓ |
| Created By | CreatedById | Lookup(User) | | |
| Dispatch\Tracking Name | Name | Text(80) | | ✓ |
| Dispatched | Dispatched__c | Checkbox | | |
| Last Modified By | LastModifiedById | Lookup(User) | | |

The interface includes a sidebar with navigation options like Details, Fields & Relationships, Page Layouts, and Lightning Record Pages. The top navigation bar shows 'Setup' and 'Object Manager'. The bottom status bar displays system information like temperature (31°C) and time (12:00 PM).

Milestone-4 :

Activity-1 :

Creation of Application :

Setup | Home | Object Manager

Search Setup

Lightning Experience App Manager

New Lightning App | New Connected App

Clone Apps(Beta)

Quickly create new Lightning apps by cloning existing apps. To use the beta feature, indicate that you've read all legal requirements and agree to participate by toggling Enable App Cloning. See additional details and terms in the [Winter '23 release notes](#)

Enable App Cloning ☐ Disabled

23 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

| | App Name ↑ | Developer Na... | Description | Last Modified ... | Ap... | Vi... |
|---|------------------|-----------------|--|----------------------|-----------|-------|
| 1 | All Tabs | AllTabSet | | 28/03/2023, 12:13 pm | Classic | |
| 2 | Analytics Studio | Insights | Build CRM Analytics dashboards and apps | 28/03/2023, 12:13 pm | Classic | ✓ |
| 3 | App Launcher | AppLauncher | App Launcher tabs | 28/03/2023, 12:13 pm | Classic | ✓ |
| 4 | Bolt Solutions | LightningBolt | Discover and manage business solutions designed for your industry. | 28/03/2023, 12:15 pm | Lightning | ✓ |

Milestone-5:

Activity-1:

Creation of Custom Tab :

Setup | Home | Object Manager

Search Setup

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

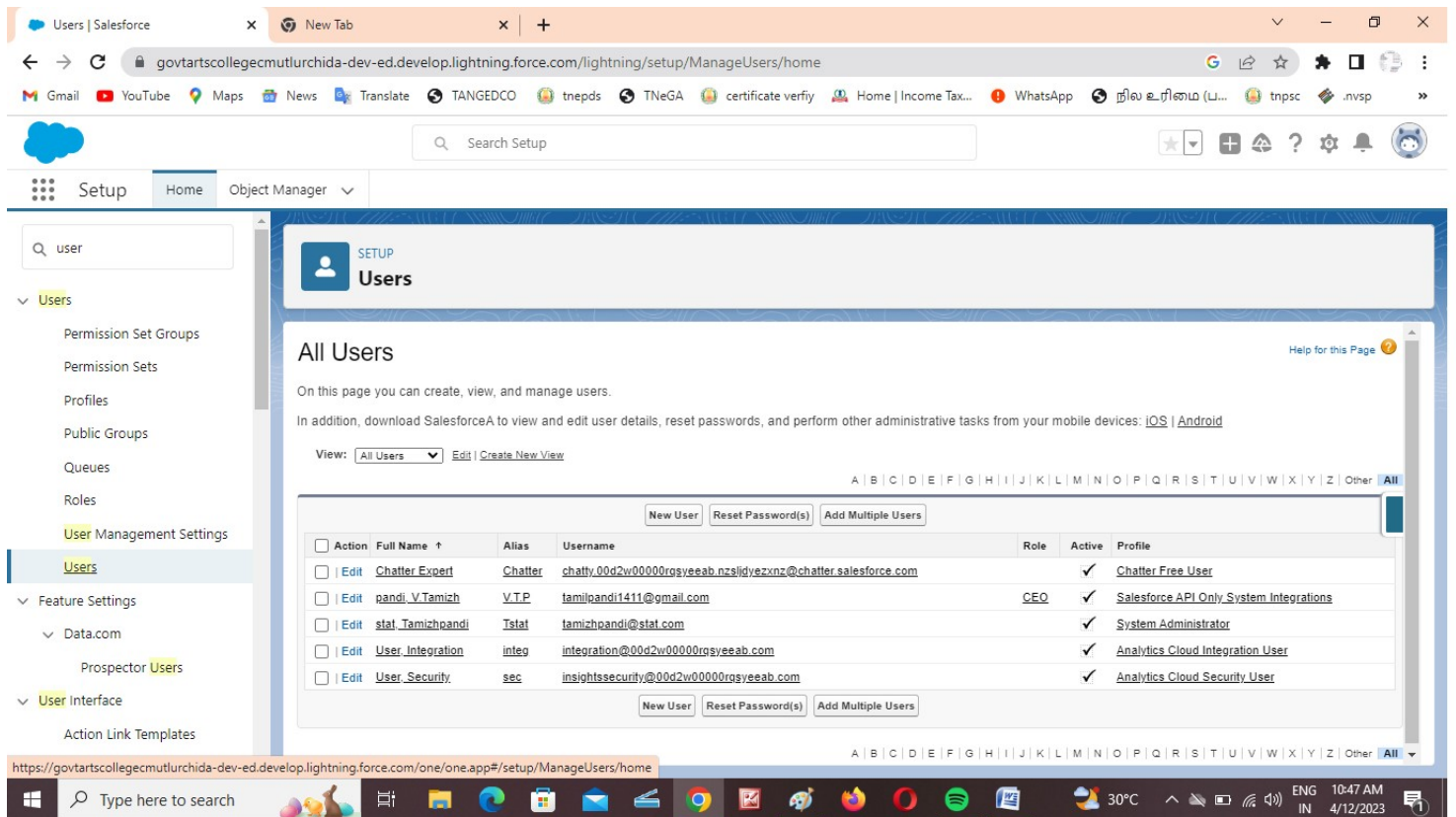
Custom Object Tabs

| Action | Label | Tab Style | Description |
|------------|---------------|-------------|-------------|
| Edit Del | checkboxboxes | Alarm clock | |
| Edit Del | Disposables | Bank | |
| Edit Del | parents | Can | |
| Edit Del | phones | Building | |
| Edit Del | students | Circle | |
| Edit Del | warehouses | Bell | |
| Edit Del | warehouses | Books | |

Milestone-6 :

Activity 1:

Creation of User :



The screenshot displays the Salesforce 'Users' management interface. The left sidebar shows the navigation menu with 'Users' selected. The main content area, titled 'All Users', provides instructions on how to manage users and includes links for mobile app downloads. Below this, there is a table listing existing users with columns for Action, Full Name, Alias, Username, Role, Active status, and Profile. The table contains five entries, including 'Chatter Expert', 'pandi_V.Tamizh', 'stat_Tamizhpandi', 'User_Integration', and 'User_Security'. At the bottom of the page, a Windows taskbar is visible with various application icons and system information.

| Action | Full Name | Alias | Username | Role | Active | Profile |
|---------------------------------|------------------|---------|---|------|--------|---|
| <input type="checkbox"/> Edit | Chatter Expert | Chatter | chatty.00d2w00000rqsyeeab.nzsljdyezxnz@chatter.salesforce.com | | ✓ | Chatter Free User |
| <input type="checkbox"/> Edit | pandi_V.Tamizh | V.T.P. | tamilpandi1411@gmail.com | CEO | ✓ | Salesforce API Only System Integrations |
| <input type="checkbox"/> Edit | stat_Tamizhpandi | Tstat | tamizhpandi@stat.com | | ✓ | System Administrator |
| <input type="checkbox"/> Edit | User_Integration | integ | integration@00d2w00000rqsyeeab.com | | ✓ | Analytics Cloud Integration User |
| <input type="checkbox"/> Edit | User_Security | sec | insightssecurity@00d2w00000rqsyeeab.com | | ✓ | Analytics Cloud Security User |

Milestone-7 :

Activity-1:

Creation of Validation Rule :

account | Salesforce

govtartscollegecmutlurchida-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003orgn/ValidationRules/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

account

Validation Rules

0 Items, Sorted by Rule Name

NEW

| RULE NAME | ERROR LOCATION | ERROR MESSAGE | ACTIVE | MODIFIED BY |
|----------------------|----------------|---------------|--------|-------------|
| No items to display. | | | | |

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Type here to search

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Activity-2 :

Creation of Cross Object :

Contact | Salesforce

govtartscollegecmutlurchida-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Contact/Details/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Contact

Details

Description

API Name

Contact

Custom

Singular Label

Contact

Plural Label

Contacts

Enable Reports

Track Activities

Track Field History

Deployment Status

Help Settings

Standard salesforce.com Help Window

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Type here to search

30°C


ENG IN 10:50 AM 4/12/2023

Creation of Report :

Creation of Activity :

product with stock availability

Record Count



product name

- air conditioner
- fan
- refrigerator
- washing machine

4

View Report (product with stock availability)

4.Trailhead Profile Public URL :

Team Lead - <https://trailblazer.me/id/tstat12>

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

Team Member 2- <https://trailblazer.me/id/subashinip22092003>

Team Member 3- <https://trailblazer.me/id/svasu133>

5. ADVANTAGES&DISADVANTAGE :

For Salesforce users, your database is likely the hub of most of your daily activities. Between tracking data, running reports, and managing communications, it often seems like your Salesforce system can do it all.

6.APPLICATIONS :

Streamline virtual events with landing pages, registration, video production, on-demand content and hosting - all in one plac

Boost attendee turnout with timely reminders and automated calendar blocks.

Automate your event workflows

7. CONCLUSION :

Salesforce for Retail, Salesforce offers a set of solutions specifically tailored to the unique challenges and opportunities facing retailers. These solutions include tools for managing inventory, automating retail operations, personalizing the shopping experience, and analyzing customer data to drive sales and marketing decisions. Some examples of Salesforce products that can be useful for retail include Salesforce Commerce Cloud, Salesforce Marketing Cloud, and Salesforce Service Cloud.

8.FUTURE SCOPE :

Salesforce is the world's largest cloud Customer Relationship Management (CRM), designed to help you build client interactions, develop apps, and integrate with other systems. If you're an IT professional looking for a way to specialize in a particular field with promising career possibilities, Salesforce is a go-to choice today.

Salesforce certifications are an excellent approach to developing technical knowledge and skills in the world's most popular CRM platform. Because the number of end-users on the Salesforce platform is growing, getting started with Salesforce now feels more appropriate and essential than ever. There is a scarcity of highly skilled Salesforce professionals in enterprises and multinational companies.

While exploring what's in it for me in the Salesforce ecosystem, look at the [Salesforce Admin Career Path](#) because that is usually the first step for any newcomer.