

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:

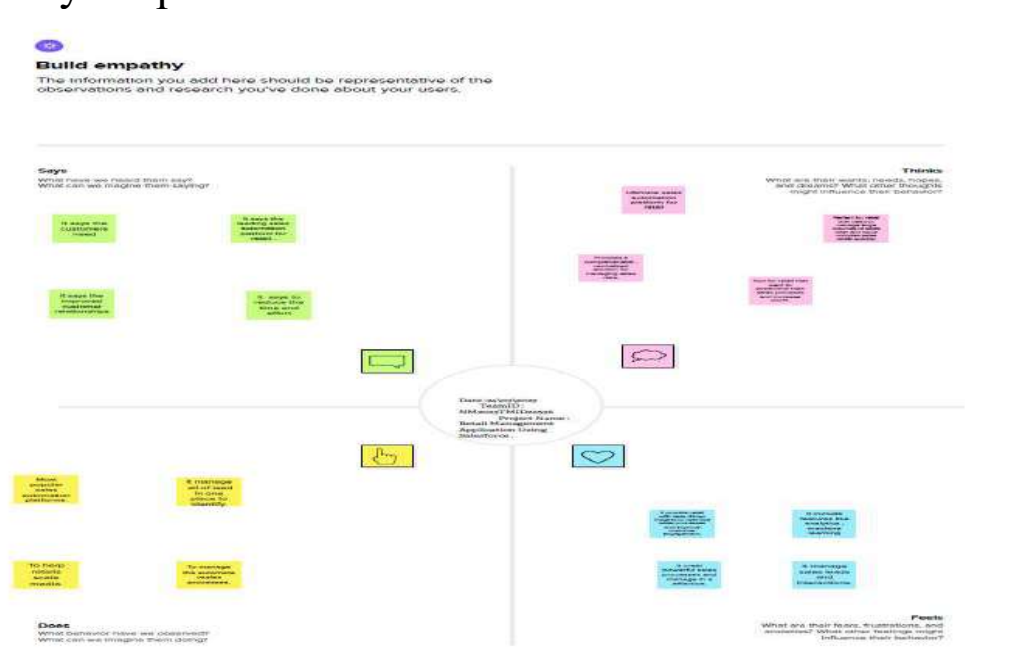
Customer Engagement: Salesforce provides a unified platform for managing customer interactions, which enables retailers to deliver personalized shopping experiences. With features like Einstein AI and Live Agent, retailers can provide real-time assistance and support to customers, resulting in increased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

1.2 Purpose :

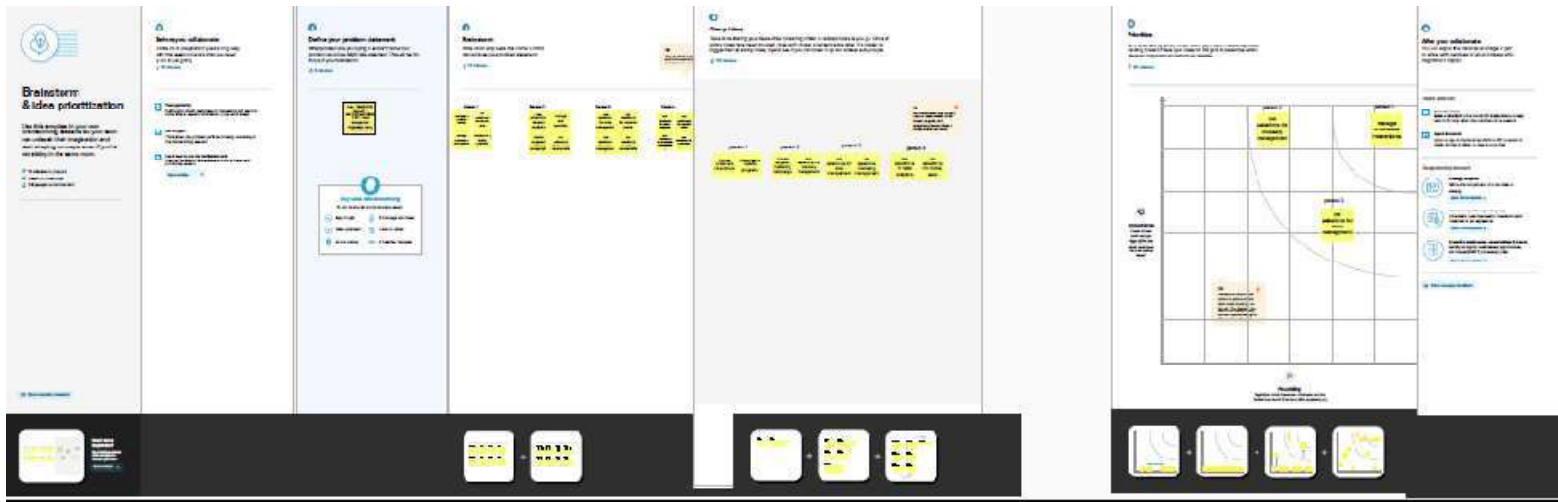
- **Automated Sales Processes:** With Salesforce, you can automate your sales processes and make them more efficient. ...
- **Improved Customer Relationships:** With Salesforce, you can keep track of your customers' movements and interactions in a centralized location.

1. Problem Definition & Design Thinking :

1.1 Empathy Map :



1.2 Ideation & Brainstorming Map :



3.Result :

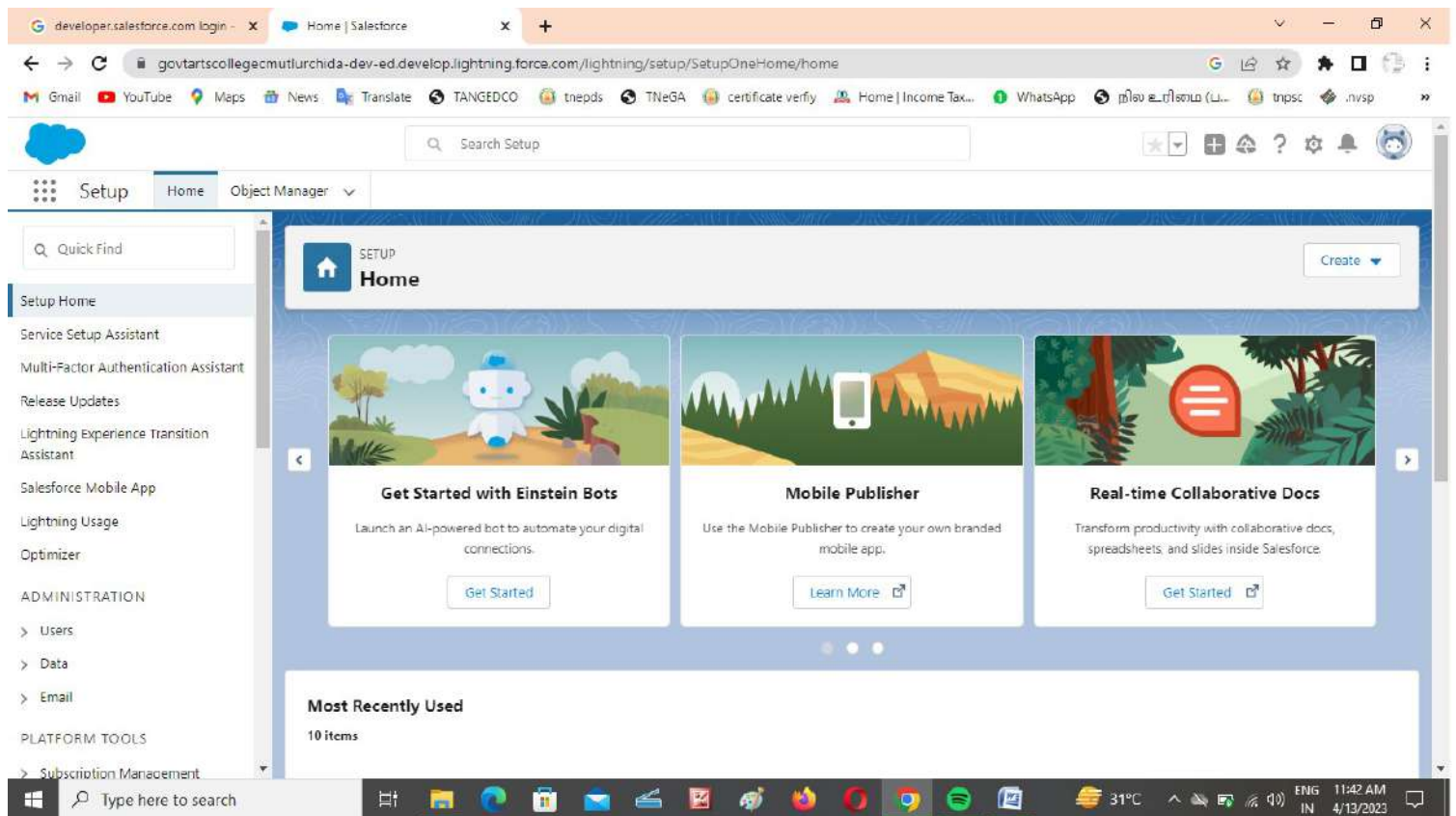
3.1 Data Model :

| 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 :

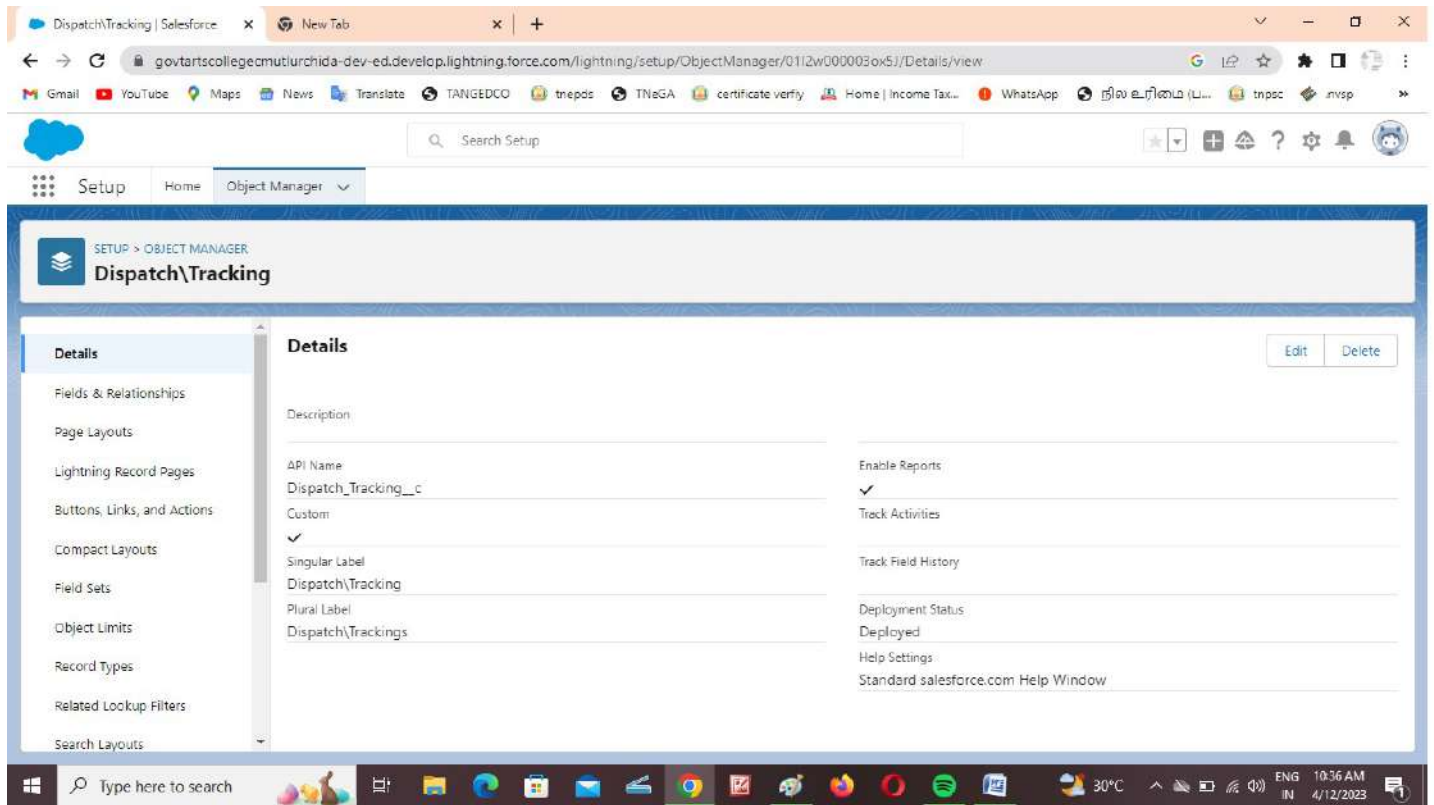
Activity 1 :



Milestone-2 :

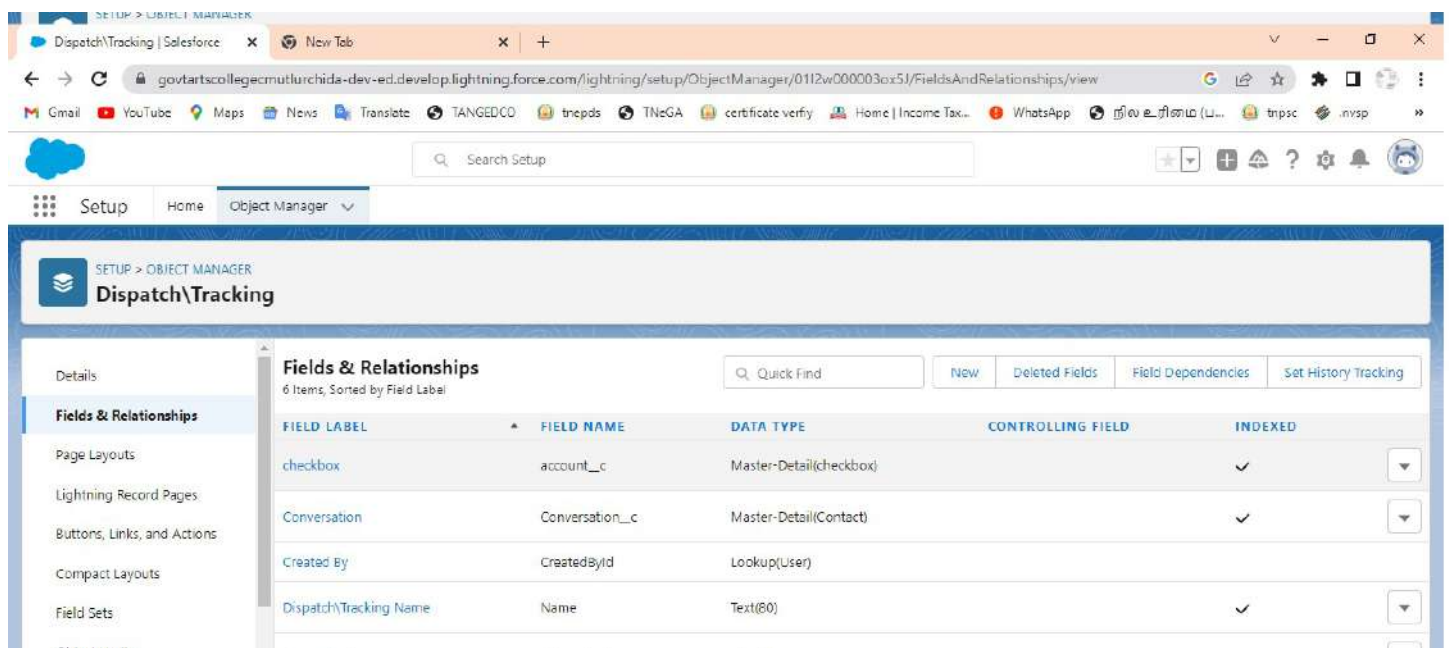
Actitivity-1 :

Creation of Object Dispatch/ Tracking



Activity-2 :

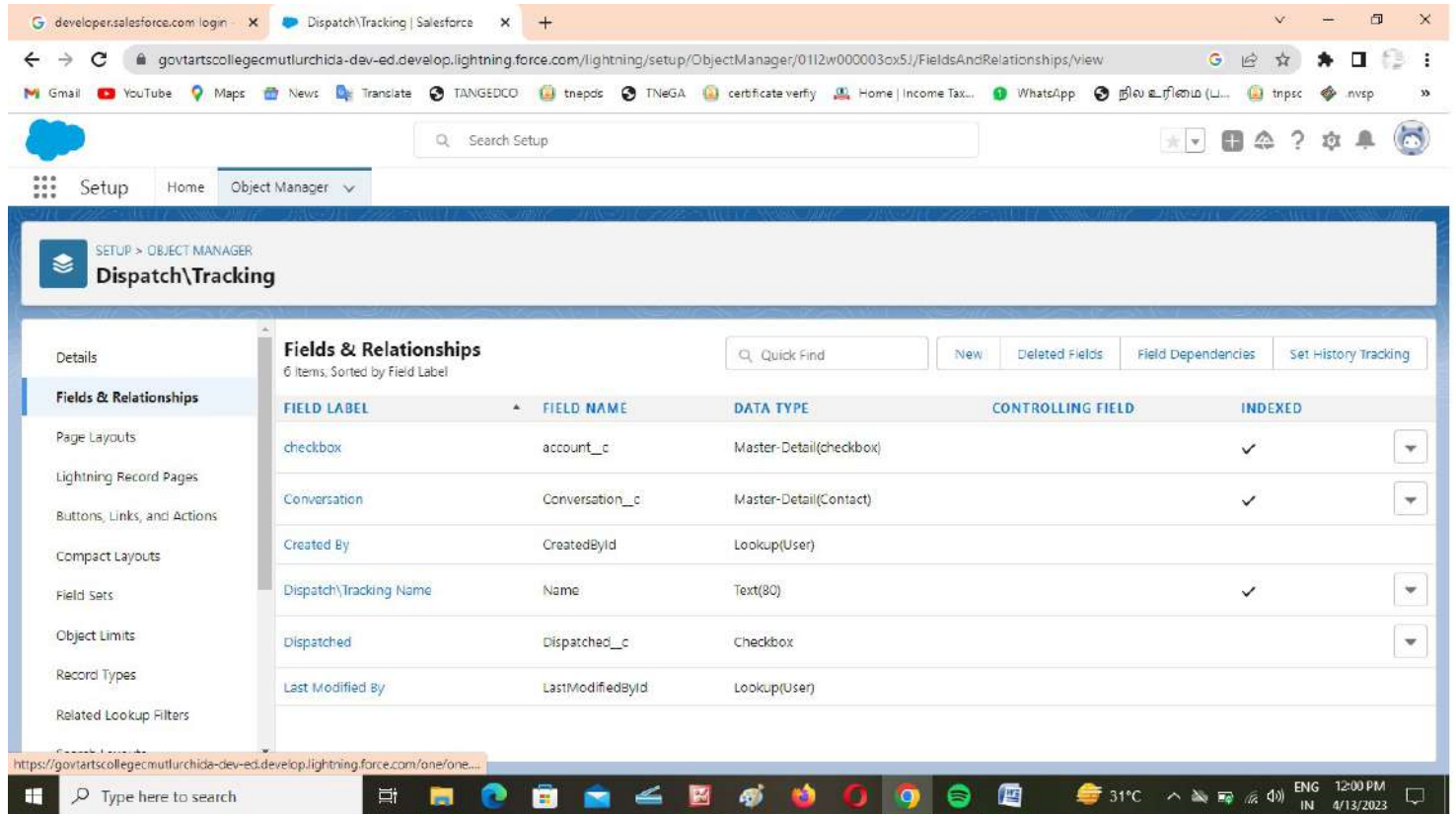
Creation of Fields on Dispatch/Tracking :



Milestone-3 :

Activity-1

Creation of Relationship Between Object :



The screenshot shows the Salesforce Object Manager interface for the 'Dispatch\Tracking' object. The left sidebar lists various setup options, with 'Fields & Relationships' selected. The main area displays a table of fields and their relationships.

| 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) | | |

Milestone-4 :

Activity-1 :

Creation of Application :

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 app menu items - TabSet Type

| | App Name | Developer Name | Description | Last Modified | App Type | Visibility |
|---|------------------|----------------|--|----------------------|-----------|------------|
| 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 Tabs

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 | checkboxes | Alarm clock | |
| Edit Del | Dispatches | Blank | |
| Edit Del | parents | Can | |
| Edit Del | phones | Building | |
| Edit Del | students | Circle | |
| Edit Del | warehouses | Ball | |
| Edit Del | warehouse | Books | |

Milestone-6 :

Activity 1:

Creation of User :

The screenshot shows the Salesforce 'Users' management page. The left sidebar contains a navigation menu with options like 'Setup', 'Home', 'Object Manager', and 'Users'. The main content area is titled 'All Users' and includes a search bar, a 'View' dropdown set to 'All Users', and buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'. Below these is a table listing existing users with columns for Action, Full Name, Alias, Username, Role, Active status, and Profile. The table contains five entries: Chatter Expert, pandi V.Tamilh, staj Tamizhpani, User Integration, and User Security. The bottom of the image shows the Windows taskbar with various application icons and the system clock indicating 10:47 AM on 4/12/2023.

| Action | Full Name | Alias | Username | Role | Active | Profile |
|-------------------------------|------------------|---------|---|------|-------------------------------------|---|
| <input type="checkbox"/> Edit | Chatter Expert | Chatter | chatter.0002w00000rsveab.nzslidvexnc@chatter.salesforce.com | | <input checked="" type="checkbox"/> | Chatter Free User |
| <input type="checkbox"/> Edit | pandi V.Tamilh | V.T.P. | tamilpandi1411@gmail.com | CEO | <input checked="" type="checkbox"/> | Salesforce API Only System Integrations |
| <input type="checkbox"/> Edit | staj Tamizhpani | Tstaj | tamizhpani@staj.com | | <input checked="" type="checkbox"/> | System Administrator |
| <input type="checkbox"/> Edit | User Integration | inteu | integration@0002w00000rns/eeab.com | | <input checked="" type="checkbox"/> | Analytics Cloud Integration User |
| <input type="checkbox"/> Edit | User Security | sec | insightssecurity@0002w00000rns/eeab.com | | <input checked="" type="checkbox"/> | 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

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

Validation Rules

0 Items. Sorted by Rule Name

[New](#)

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

Type here to search

30°C

ENG 10:49 AM 4/12/2023

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

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

Contact

Custom

Singular Label

Contact

Plural Label

Contacts

Enable Reports

Track Activities

Track Field History

Deployment Status

Help Settings

Standard salesforce.com Help Window

Type here to search

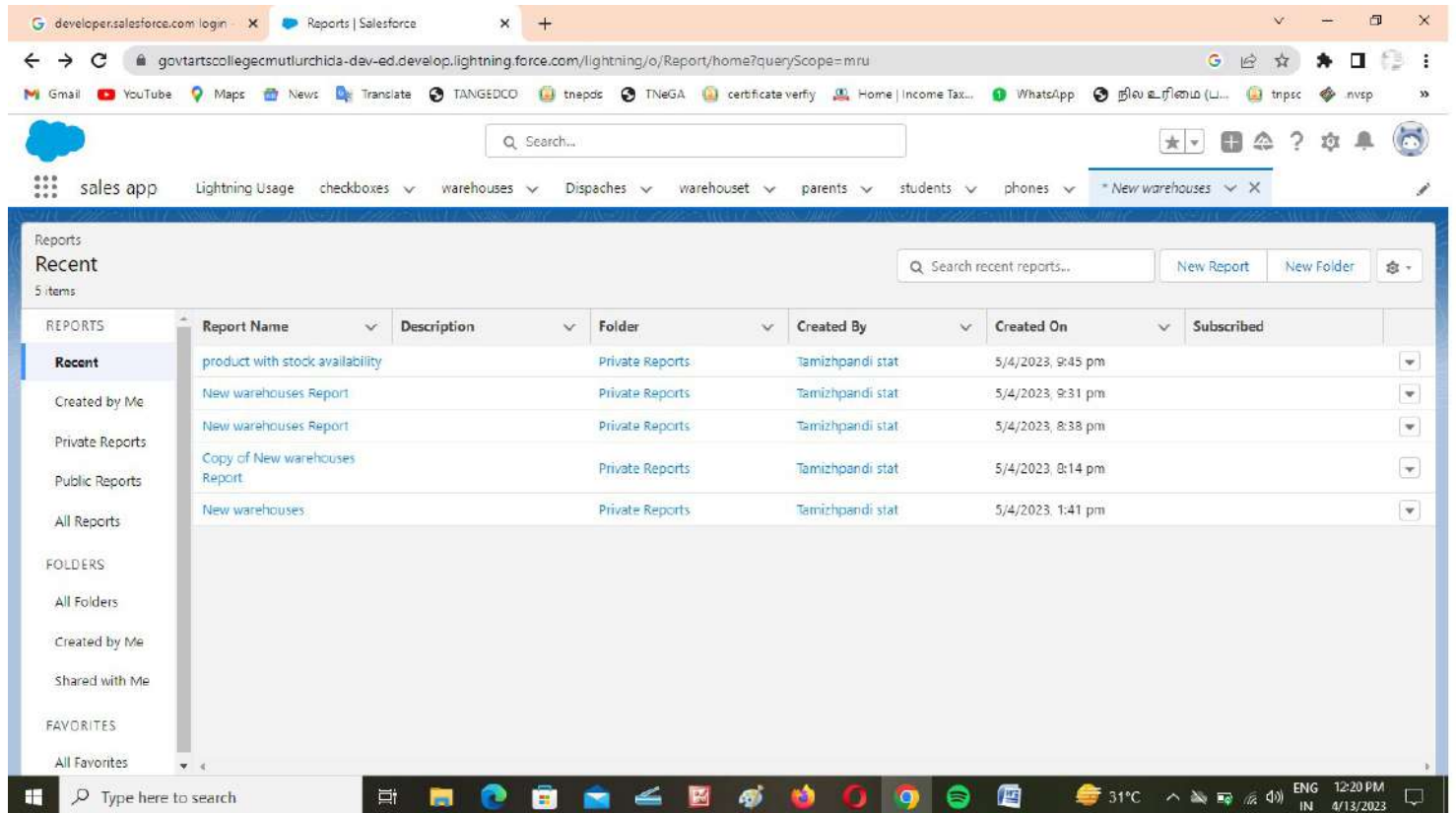
30°C

ENG 10:50 AM 4/12/2023

Milestone-8 :

Activity :

Creation of Report :



The screenshot displays the Salesforce Reports page. The left sidebar shows the 'Reports' section with 'Recent' selected. The main area shows a table of recent reports. The table has columns for Report Name, Description, Folder, Created By, Created On, and Subscribed. The reports listed are:

| Report Name | Description | Folder | Created By | Created On | Subscribed |
|---------------------------------|-------------|-----------------|------------------|-------------------|------------|
| product with stock availability | | Private Reports | Tamizhpandi stat | 5/4/2023, 9:45 pm | |
| New warehouses Report | | Private Reports | Tamizhpandi stat | 5/4/2023, 9:31 pm | |
| New warehouses Report | | Private Reports | Tamizhpandi stat | 5/4/2023, 8:38 pm | |
| Copy of New warehouses Report | | Private Reports | Tamizhpandi stat | 5/4/2023, 8:14 pm | |
| New warehouses | | Private Reports | Tamizhpandi stat | 5/4/2023, 1:41 pm | |

Milestone-9 :

Activity

Creation of Activity :

The screenshot displays a Salesforce Lightning App Page. At the top, there's a navigation bar with a search bar and several tabs: 'sales-app', 'lightning stage', 'checkboxes', 'warehouses', 'Dispatches', 'warehouse', 'parents', 'students', 'phones', and 'Dashboards'. Below the navigation bar, the main content area shows a dashboard titled 'Dashboard'. The dashboard features a donut chart titled 'product with stock availability'. The chart displays a total record count of 4, divided into four categories: 'air conditioner' (1), 'fan' (1), 'refrigerator' (1), and 'washing machine' (1). The dashboard also includes a 'View Report' link and a 'product with stock.png' image.

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.