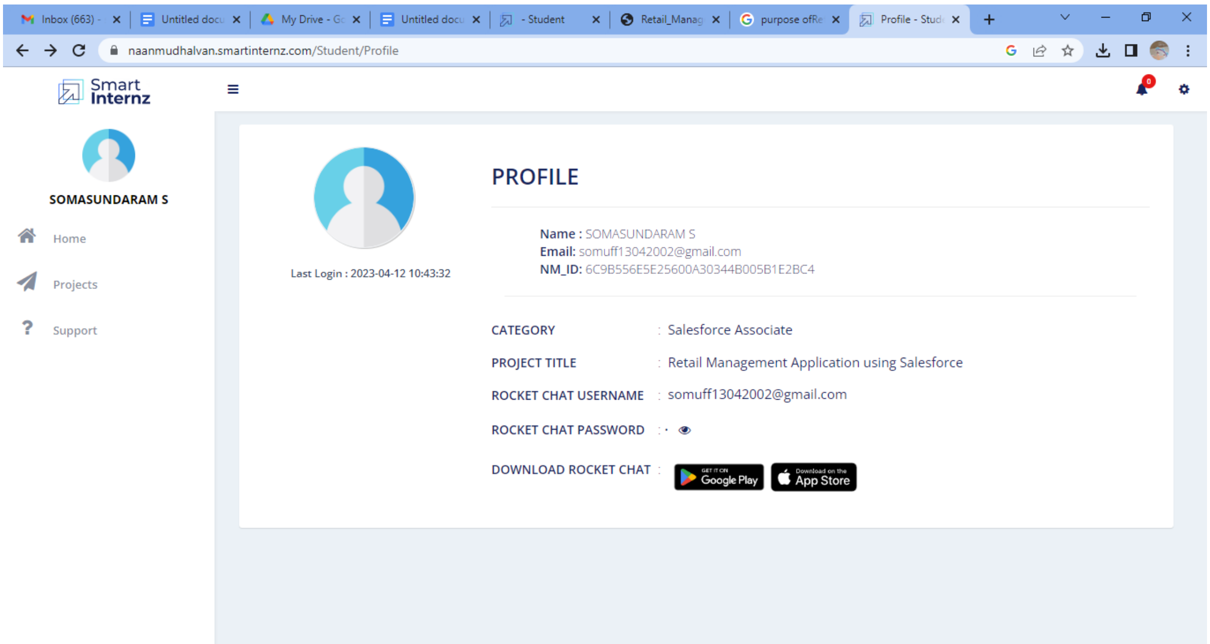
PROJECT MANUAL

Retail Management Application Using Salesforce



1 INTRODUCTION

1. 1 Overview

A brief description about your project

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.

1.2 purpose

The use of this project. What can be achieved using this

Benefits of using a MIS include **making it easier to track items and products in the supply chain, reducing inventory, reducing labor costs, and establish and maintain good customer relationships**.

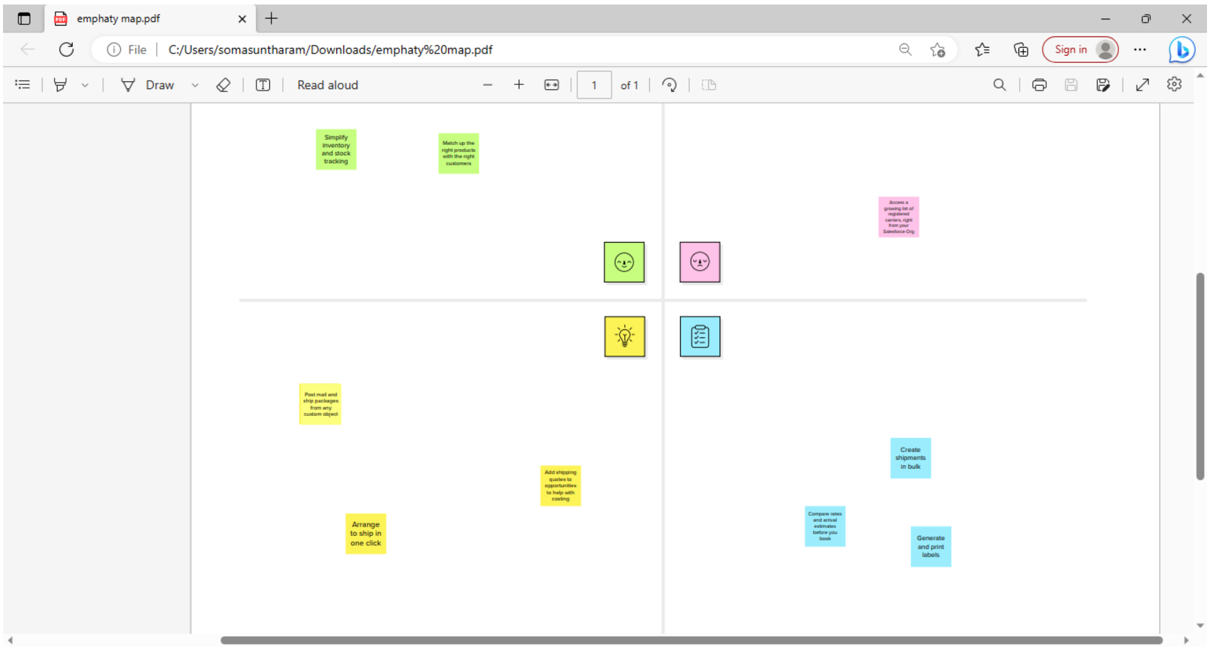
PROJECT MANUAL

Retail Management Application Using Salesforce

.

2 problem definition & Design Thinking

2.1 Empathy Map

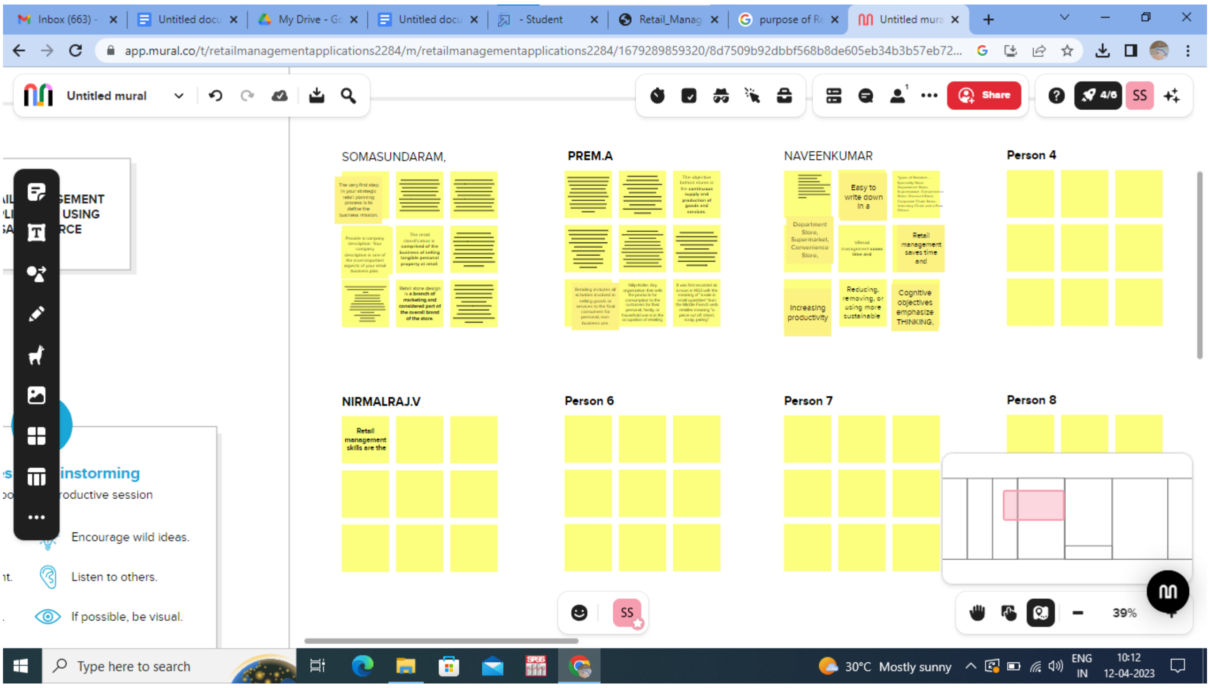


2.2 Ideation & Brainstorming Map

Paste the ideation & brainstorming map screenshot

PROJECT MANUAL

Retail Management Application Using Salesforce



3 RESULT

3.1 Data modal:

Application Object Description Service app Cases Historical problems of customers will be stored here Accounts We captures customers data

Retail Management Application Using Salesforce

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.

ntroduction

PROJECT MANUAL

Retail Management Application Using Salesforce

Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don't know where you should start on your learning journey? If you've answered yes to any of these questions, then you're in the right place. This module is for you.

Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module, we'll take you through these features and answer the question, "What is Salesforce, anyway?"

What Is Salesforce?

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.
Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.
So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this

Objects

Objects are database tables that permit you to store data that is specific to an organization.

Salesforce objects are of two types:
1) Stae
1) Navigate to setup and select object manager.

2) At the top of the right side there you can find create custom object.

3) You will navigate to custom object definition edit where you have to give the object name.

PROJECT MANUAL

Retail Management Application Using Salesforce

4) The label name has Display/tracking and Plural label has Display/trackings.

5) In enter record name label and format enter name record name has Tracking ID.

6) And the data type has text.

7) In deployment status select deployed option.

8) Ensure that you have to select at least one option in the object creation option; it is available only once when a custom object is created.

9) Then click on next you will navigate to the new custom object tab where you have to select tab style and click on next.

10) After tab selection you will be navigated to add to profiles select default on click on next.

11) Thereafter you have to select a custom app select include tab so that object will be available in all objects and select save option.
dard objects 2) Custom objects

Objects involved in retail management are
ields available on Dispatch/tracking

1) Dispatched

2) Expected date of delivery

3) Tracking Id

4) Sales order

Creation of fields on Dispatch/tracking

PROJECT MANUAL

Retail Management Application Using Salesforce

1) Select your object from object selection has Dispatch/Tracking.

2) And select the option fields and relationships.

3) At the top right side you can find a new select that option

4) Now you have to select data type, Checkbox Has data type.

5) And you will navigate to enter the details page where you give the field label.

6) And give the label name has Dispatched

7) At the bottom of the object you can find options like required, unique, external id select required option so that always require a value in this field in order to save.

8) Click next you will navigate to field level security click on visible checkbox so that it is
visible to all profiles.

9) Select the next option, select the page layout and save

Relationship B/W Objects

It's time to take things to the next level with object relationships. Object relationships are special field types that connect two objects. As a crm product owner create relationships to link objects with each other, so that when users view records, they can also see related data

Creation Of Relationships Between Objects

To create a Master Detail relationship between Dispatch/tracking and sales order.

PROJECT MANUAL

Retail Management Application Using Salesforce

1) Go to the Set Up option from the Home Page and click on it.

2) Go to the object manager and select 'Dispatch/tracking' object from the list

3) And select fields and relationships and click on new.

4) Select the data type has Master detail relationship

5) And select related to the object has sales order, and click on next.

6) You will navigate to the label name page where you give the label name for the field, give it has sales order and click next.

7) Select visible for all profiles in field level security and select page layout in next page and
save it.

Creation Of Application

1) Navigate to setup and search for app manager

2) And select an option for a new lightning app.

3) Give the app name has sales app.
4) Upload the picture and click next.

5) Choose the app option as navigation style- standard navigation, support from factors-desktop & mobile and select next.

6) And move the objects from available items to selected items.

User

PROJECT MANUAL

Retail Management Application Using Salesforce

So what is a 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

7) Accounts, contacts, opportunities, Leads, warehouse, dispatch/tracking, campaign to selected items.

Layouts

Page layouts control the layout of an object, As a crm product owner create custom page layouts which defines which fields the user can view and edit while entering data in objects. And must contain different sets of fields and related lists.
Custom Page layouts
1) Warehouse page layout
2) Sales order layout
3) Dispatch/Tracking layout

Creation Of Custom Tabs

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

2) Under Custom Object Tabs, click New.

3) For Object, select Warehouset.

4) For Tab Style, select any icon.

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

PROJECT MANUAL

Retail Management Application Using Salesforce

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
has LEFT(Phone, 1) <> "+".

4) And in error message give the description has Phone number must begin with + (country
code).

5) In error location select top of the field.

Creation Of Cross Object

Cross Object Formula
Using an object formula lets you reference merge fields on a master object from a master detail relationship on the detail object. As a crm product owner they wants to save user's clicks and displays contacts' parent accounts website value on the contact record so users do not have to click on the account to find the website.

Creation of cross object
1) Select your object from object selection has Contact.

2) And select the option fields and relationships.

3) At the top right side you can find a new select that option.

4) Now you have to select data type, formula Has data type.

5) And you will navigate to enter the details page where you give the field label.

6) And give the label name has Account Website

7) In the formula field enter this formula Account Website.

8) At the bottom of the object you can find options like required, unique, external id select required option so that always require a value in this field in order to save.

9) Click next you will navigate to field level security click on visible checkbox so that it is visible to all profiles.

10) Select the next option, select the page layout and save it.

Reports

A report is a list of records that meet the criteria you define. It's displayed in Salesforce 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.

Creation Of Report

Note- While creation of report ensure that update preview automatically is selected which is
available at the right side of the report page.
1) Click on the app launcher and search for reports.

2) And select a new report, for the record type category select other reports.

3) Select Warehouses for the report type name.

4) Select the start button to create a new report.

5) At the left side of the report you can find an outline pane.

6) In the group rows select Product name.

7) And in columns warehouse:warehouse name and stock available.

8) Now navigate to the filter pane available next to the outline pane and ensure in the show me section all my warehouses is selected.

9) And in the warehouse created date select all time.

10) And give the label name products with stock availability.

11) Click on save and run for saving the report.

Dashboards

Dashboards in Salesforce are a graphical representation of Reports. It shows data from so

1) Click on the app launcher and search for dashboards.

2) Select the new dashboard option.

3) Name the dashboard has a products with stock availability.

4) And select create option.

5) Now click on Add component and for report select passport with locations.

Retail Management Application Using Salesforce

6) Select the donut chart in display as section.

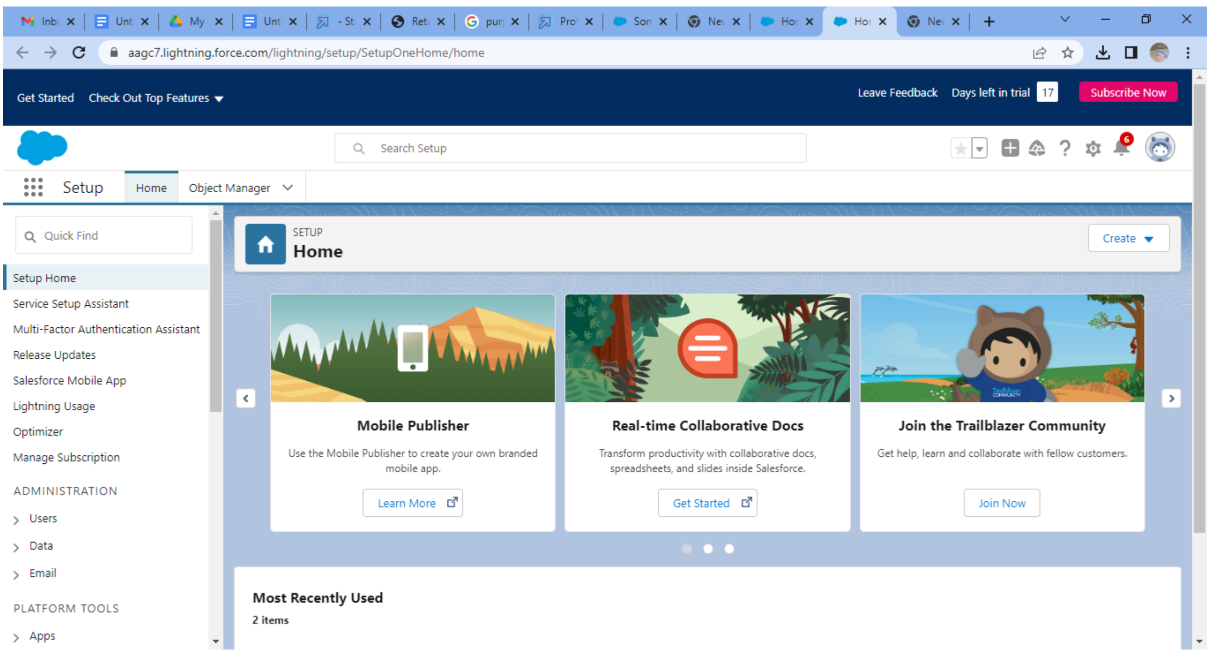
8) Leave the default values.

9) Click on add.

10) And save the dashboard.
urce reports as visual components.

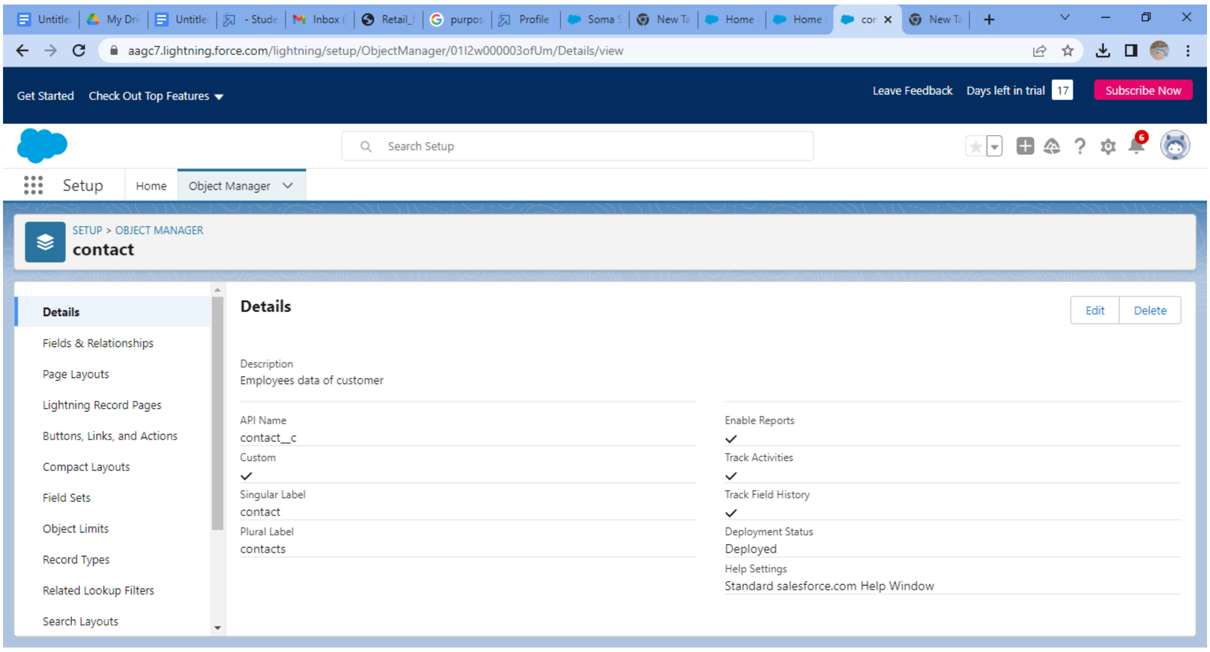
3.2 Activity & screenshot

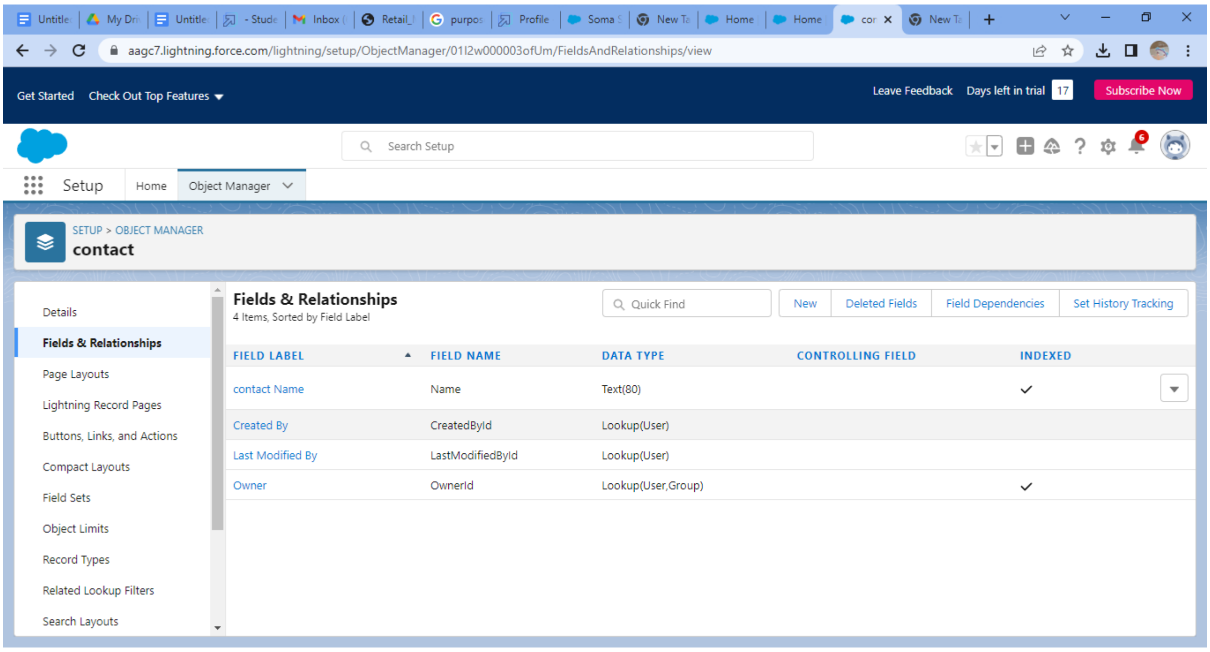
Attach the screenshots of your project activity along with the description.



PROJECT MANUAL

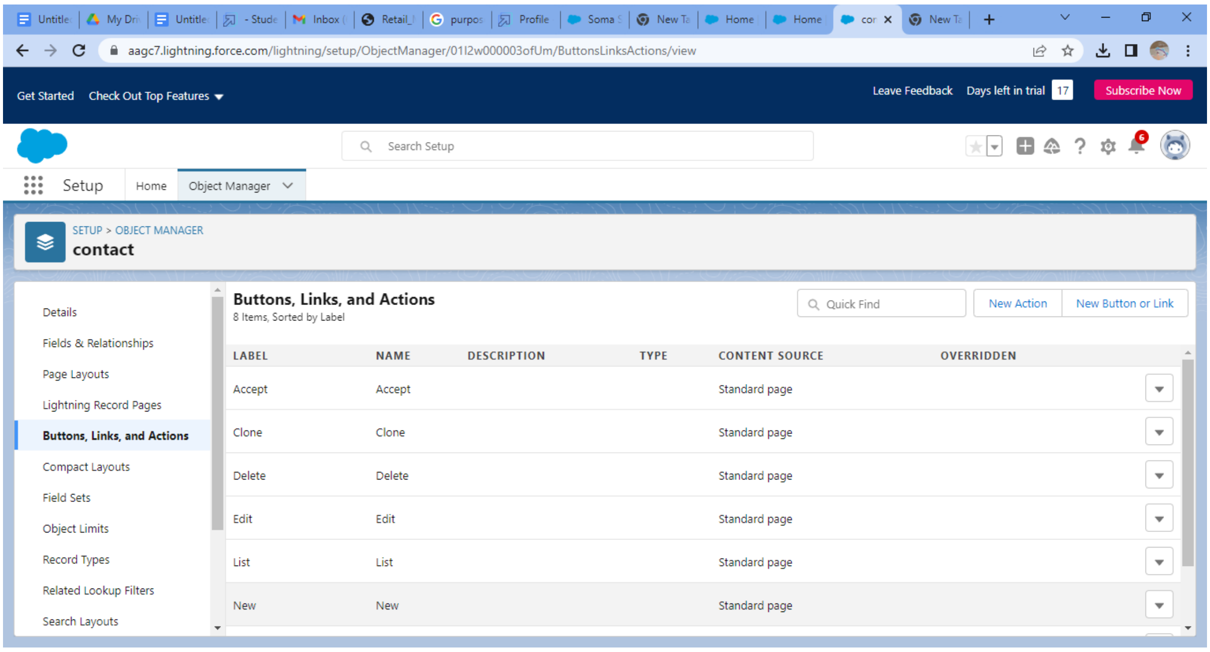
Retail Management Application Using Salesforce





PROJECT MANUAL

Retail Management Application Using Salesforce



4 Trailhead profile public URL

Team lead-https://trailblazer.me/id/ssundaram76

Team Member 1-https://trailblazer.me/id/niraj264

Team Member 2-https://trailblazer.me/id/prem51

Team Member 3-https://trailblazer.me/id/navek41

5 ADVANTAGES & DISADVANTAGES

List of advantages and disadvantages of the proposed solution

ADVANTAGES

PROJECT MANUAL

Retail Management Application Using Salesforce

Better Time Management. Time management is a huge benefit of Salesforce and one of the best ways to allow a business to grow and thrive. ...

- Ultimate Accessibility. ...
- Increased Revenue. ...
- Greater Customer Satisfaction. ...
- Simple Account Planning. ...
- Trusted Reporting. ...
- Improved Team Collaboration.

DISADVANTAGE

Expensive.

- You have to pay for add-ons to get the most out of the software.
- Configuration and setup is complex and time-consuming.
- Cluttered interface makes navigation and simple tasks unnecessarily complex.
- The learning curve never seems to end.
- Customer support has a poor reputation.

6 APPLICATIONS

The areas where this solution can be applied

Salesforce is **a CRM system but it is also a sales app for iPad and a sales app for Android** that make Salesforce not only handy for management to get the data they need, but also convenient for sales reps. And when reps have all the information they need in front of them, marvelous things can happen to the bottom line.

7 CONCLUSION

CoManaging a company's sales force is important because **it may help improve the efficiency and success of the sales team**. This can help increase company revenue and create a positive work environment for sales team members.nclusion summaring the entire work and findings.

PROJECT MANUAL

Retail Management Application Using Salesforce

8 FUTURE SCOP

Enhancements that can be made in the future.

Supervisory, client communication, merchandise shipment, sales, management, and administrative services are all options for candidates with a retail management background. More than 2 million jobs are available in retail management around the world