



# RETAIL MANAGEMENT APPLICATION USING SALESFORCE

PROJECT BASED EXPERIENTIAL LEARNING PLATFORM

AMARNATH B AND TEAM

## PROJECT REPORT TEMPLATE

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.

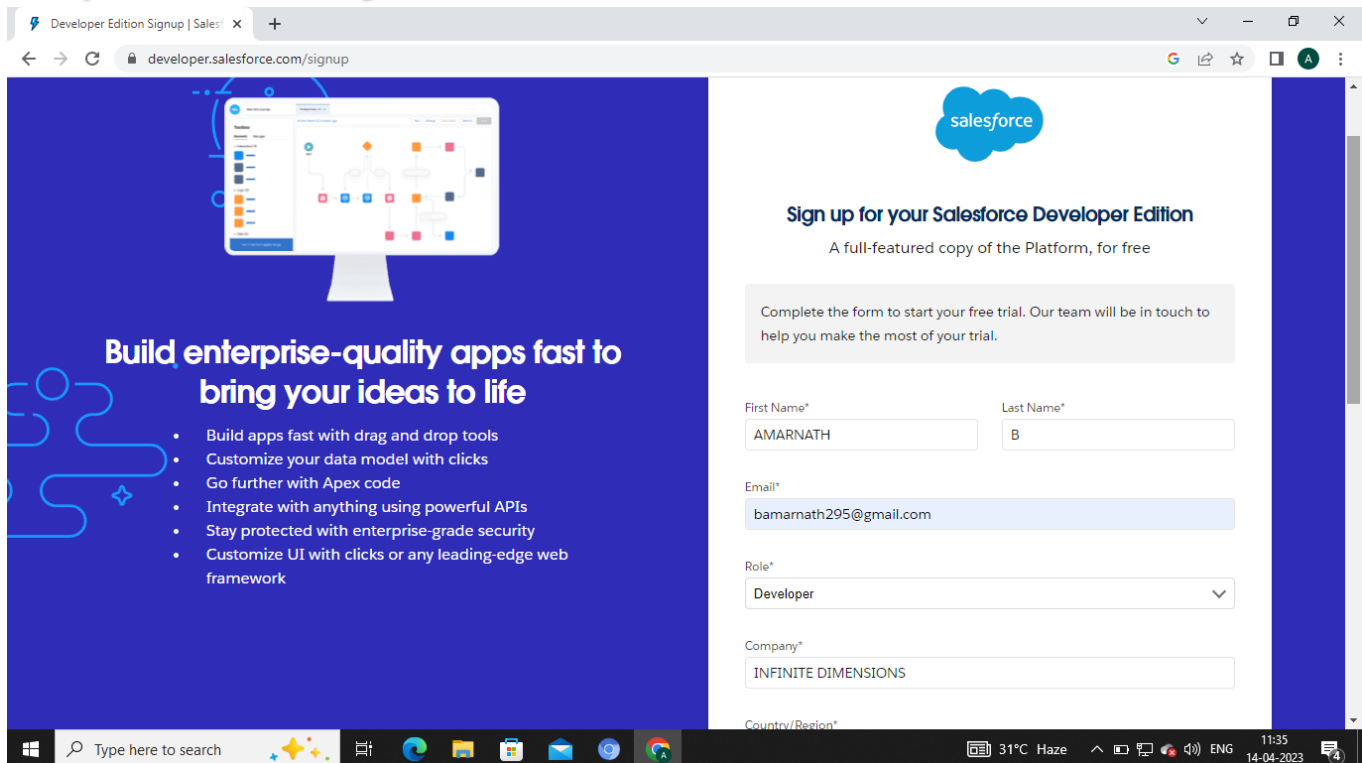
### Milestone-1 :

#### Introduction

Salesforce is a Bridge that links the Customer, Manufacturer And Retailer In A Way Which Is Easy To Use.

#### Creating Developer Account

IN <https://salesforce.com/signup>



The screenshot shows the Salesforce Developer Edition Signup page. The left side features a blue background with a diagram of a cloud-based application architecture and the text "Build enterprise-quality apps fast to bring your ideas to life". The right side is a white form area with the Salesforce logo and the heading "Sign up for your Salesforce Developer Edition". Below the heading is a sub-heading "A full-featured copy of the Platform, for free". A message states "Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial." The form fields are as follows:

- First Name\*: AMARNATH
- Last Name\*: B
- Email\*: bamarnath295@gmail.com
- Role\*: Developer (dropdown menu)
- Company\*: INFINITE DIMENSIONS
- Country/Region\*: (dropdown menu)

The bottom of the image shows a Windows taskbar with the search bar, task view button, and several application icons. The system tray shows the date and time as 11:35 on 14-04-2023.

## **INTRODUCTION:**

A NUMBER OF MILESTONES TO COMPLETE A PROJECT, IT'S A VERY USEFUL WAY TO KNOW ABOUT THE OWNERSHIP AS WELL AS CUSTOMER RELATIONSHIP.

### **1.1 OVERVIEW:**

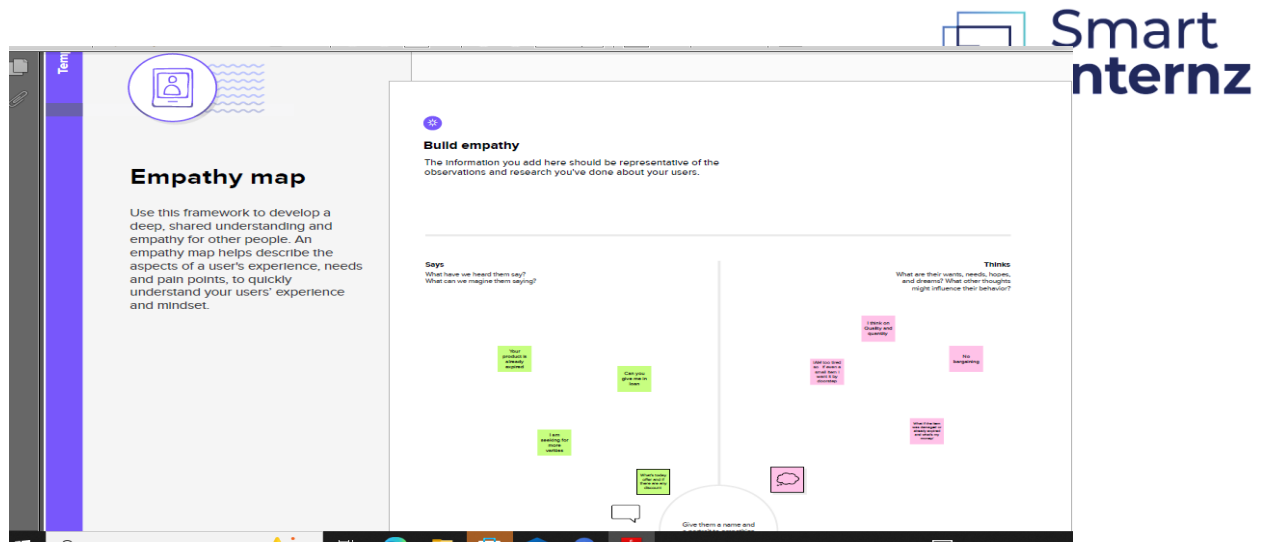
The Overall Packages Of customer Handling,Account Management,Group And Team Work.

### **1.2 PURPOSE:**

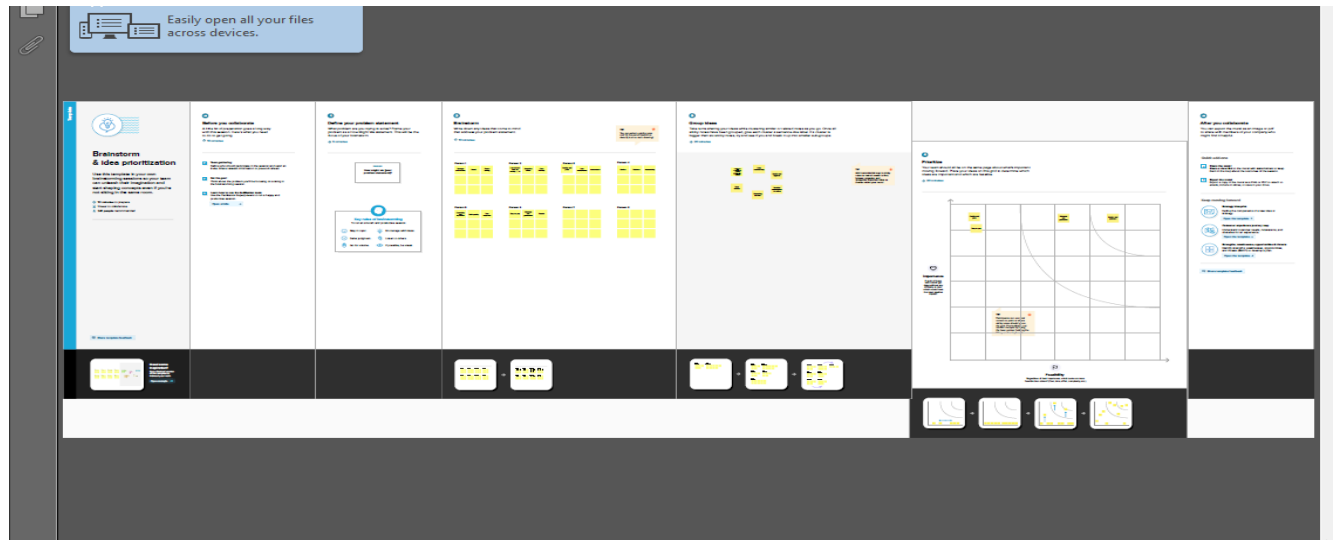
To Notice And Manage The Queries Regarding Product,Labour Patience In Online And Creating A Products,Warehouses,Custom Objects,Validation rules,And Dashboards With The Reports.

## **2 Milestone-1 Empathy Map In Various Dimensions**

### **2.1 EMPATHY MAP CREATION:**



## 2.2 IDEATION AND BRAIN STORMING MAP CREATION:



## 3. RESULTS AND TABULATION:

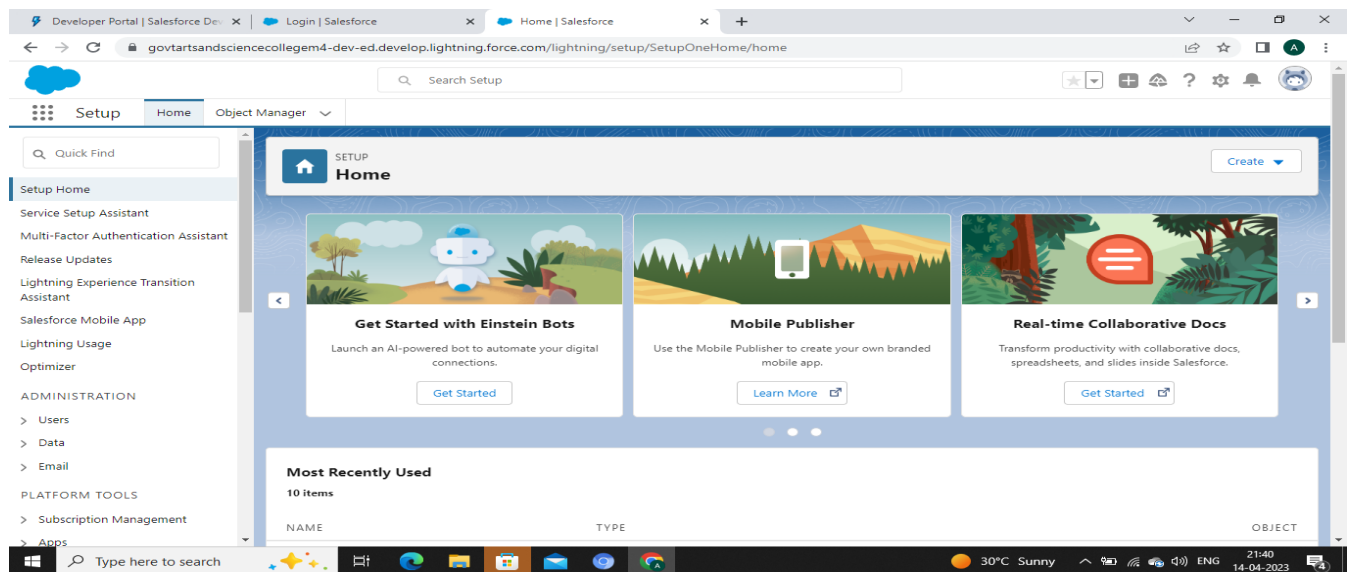
### 3.1 TABLE:

CUSTOMER RELATED QUERIES	GRAPHICAL BOXES	EMPATHY MAP AND RELATED	NO OF BOXES FILLED IN IDEATION AND BRAINSTORMING	

1 . LISTED IN THE BRAIN STORM AND EMPATHY MAP SESSION	DONE SUCCESSFULLY WITH NECESSARY POINTS	COMPLETED WITH ESSENTIAL ITEMS	18 BOXES ARE FILLED WITH NECESSARY ITEMS	
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## 3.2 ACTIVITY AND SCREENSHOTS :

### CREATING DEVELOPER ACCOUNT:



## MILESTONE 2:

### 1.CREATE OBJECT:

The screenshot shows the Salesforce Setup Home interface. On the left is a navigation menu with categories like 'Setup Home', 'ADMINISTRATION', and 'PLATFORM TOOLS'. The main area displays a 'Most Recently Used' list of 10 items. The table below represents the data shown in this list.

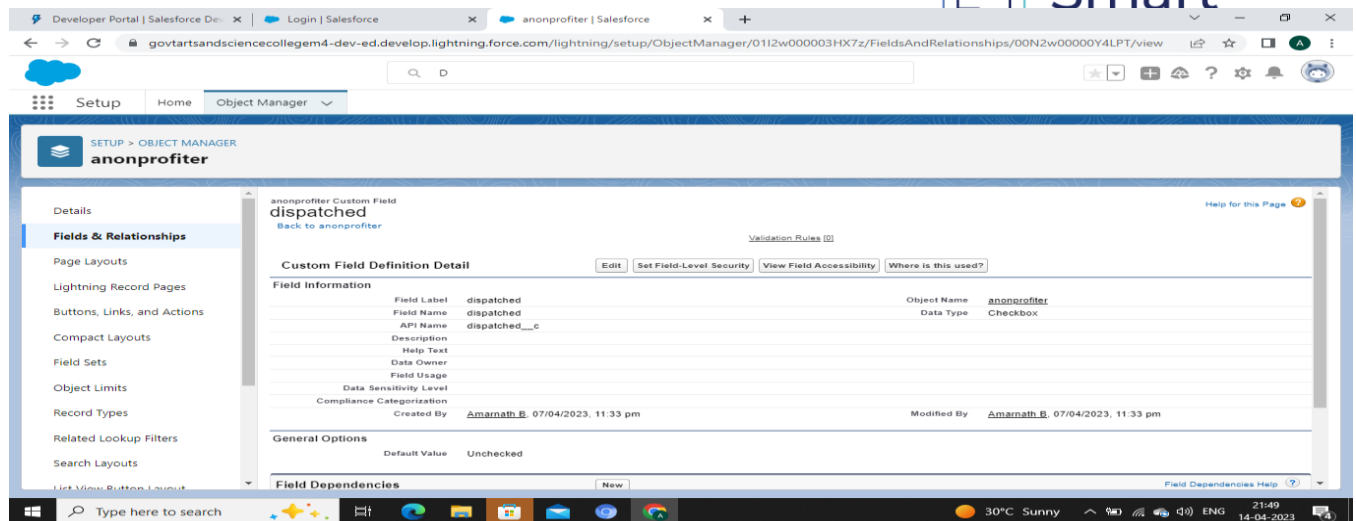
NAME	TYPE	OBJECT
Amarnath B	User	
anonprofiter	Custom Object Definition	
Contact	Custom Object Definition	
Company	Custom Object Definition	
parent	Custom Object Definition	
Phone	Custom Object Definition	
Management	Custom Object Definition	
Labour	Custom Object Definition	
Manufacturer	Custom Object Definition	
warehouset	Custom Object Definition	

## 2.FIELDS AVAILABLE ON OBJECT ANONPROFITER:

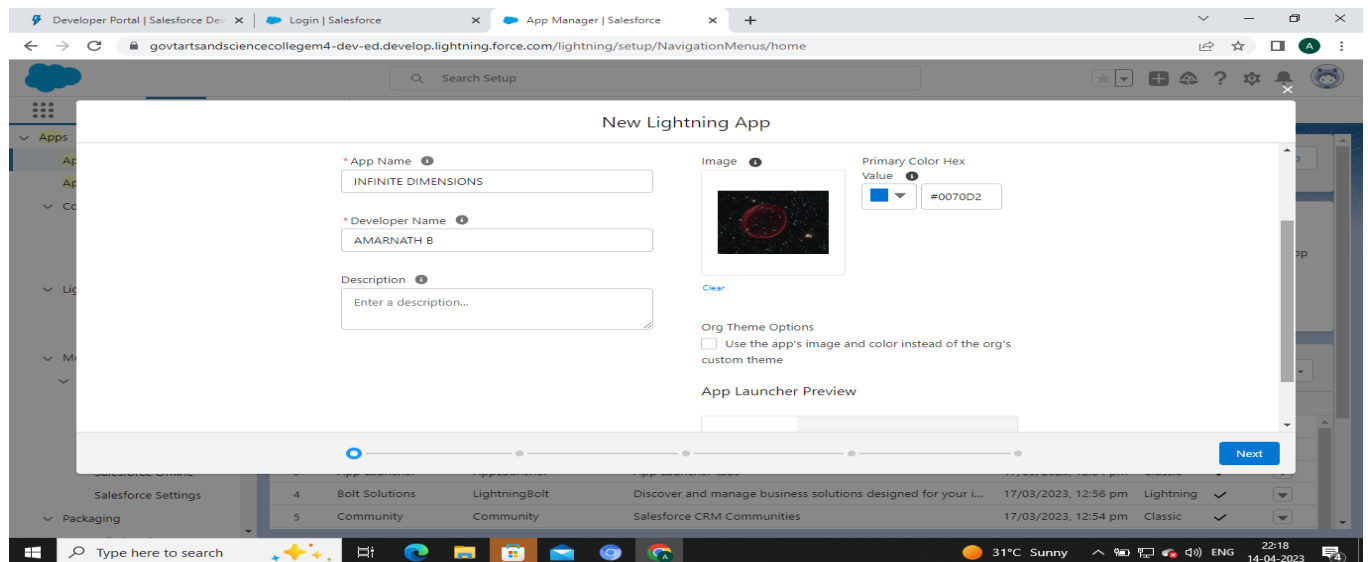
The screenshot shows the 'Details' page for the 'anonprofiter' object in the Salesforce Setup interface. The left sidebar contains a navigation menu for the object's configuration. The main area displays the object's details, including its API Name, Singular and Plural Labels, and various settings like 'Enable Reports' and 'Track Activities'.

Field	Value
API Name	anonprofiter__c
Custom	Custom
Singular Label	anonprofiter
Plural Label	anonprofiter
Enable Reports	<input checked="" type="checkbox"/>
Track Activities	<input checked="" type="checkbox"/>
Track Field History	<input checked="" type="checkbox"/>
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

## MILESTONE-3: RELATIONSHIP B/W OBJECTS:



## MILESTONE-4 APPLICATION:



## MILESTONE- 5:LAYOUTS:

## CREATION OF CUSTOM TABS:





Developer Portal | Salesforce Dev | Login | Salesforce | Phone | Salesforce

govtartsandsciencecollegem4-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003HXV8/ValidationRules/view

ph

Setup Home Object Manager

SETUP > OBJECT MANAGER  
**Phone**

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

List View Button Layout

**Validation Rules**  
1 Items, Sorted by Rule Name

New

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Phone_number_has_international_format	Phone	Phone number must begin with +(country code).	✓	Amarnath B, 15/04/2023, 10:27 am

Type here to search

33°C Sunny 22:38 14-04-2023

## 2- CROSS OBJECT FORMULA:

Developer Portal | Salesforce Dev | Login | Salesforce | Warehouse | Salesforce

govtartsandsciencecollegem4-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003HXm4/FieldsAndRelationships/view

WAR

Setup Home Object Manager

SETUP > OBJECT MANAGER  
**Warehouse**

Details

**Fields & Relationships**  
4 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Warehouse Name	Name	Text(80)		✓

Type here to search

33°C Sunny 22:44 14-04-2023

MILESTONE:7

# CREATION OF OBJECT:



Developer Portal | Salesforce Dev | Login | Salesforce | My Accounts | Accounts | Salesforce

govtartsandsciencecollegem4-dev-ed.develop.lightning.force.com/lightning/o/Account/list?filterName=00B2w00000dwY0LEAU

Search...

Infinite dimensions Accounts Contacts Opportunities Leads Work Plan Templates anonprofiters Campaigns warehousesets More

Accounts  
**My Accounts**

15 items • Sorted by Account Name • Filtered by My accounts • Updated a few seconds ago

Search this list...

	Account Name	Account Site	Billing State/Province	Phone	Type	Account Own...
1	Amarnath and team			8056966378		AB
2	Burlington Textiles Corp of America		NC	(336) 222-7000	Customer - Direct	AB
3	Dickenson plc		KS	(785) 241-6200	Customer - Channel	AB
4	Edge Communications		TX	(512) 757-6000	Customer - Direct	AB
5	Express Logistics and Transport		OR	(503) 421-7800	Customer - Channel	AB
6	GenePoint		CA	(650) 867-3450	Customer - Channel	AB
7	Grand Hotels & Resorts Ltd		IL	(312) 596-1000	Customer - Direct	AB
8	INFINITE DIMENSIONS			8056966378		AB
9	INFINITE DIMENSIONS			8056966378		AB
10	Pyramid Construction Inc.			(014) 427-4427	Customer - Channel	AB
11	sForce		CA	(415) 901-7000		AB
12	United Oil & Gas Corp.		NY	(212) 842-5500	Customer - Direct	AB
13	United Oil & Gas, Singapore		Singapore	(650) 450-8810	Customer - Direct	AB
14	United Oil & Gas, UK		UK	+44 191 4956203	Customer - Direct	AB

Type here to search

INR/USD -0.25%

22:53  
14-04-2023

Developer Portal | Salesforce Dev | Login | Salesforce | Recently Viewed | Opportunities | Salesforce

govtartsandsciencecollegem4-dev-ed.develop.lightning.force.com/lightning/o/Opportunity/list?filterName=Recent

Search...

Infinite dimensions Accounts Contacts Opportunities Leads Work Plan Templates anonprofiters Recently Viewed warehousesets More

Opportunities  
**Recently Viewed**

3 items • Updated a few seconds ago

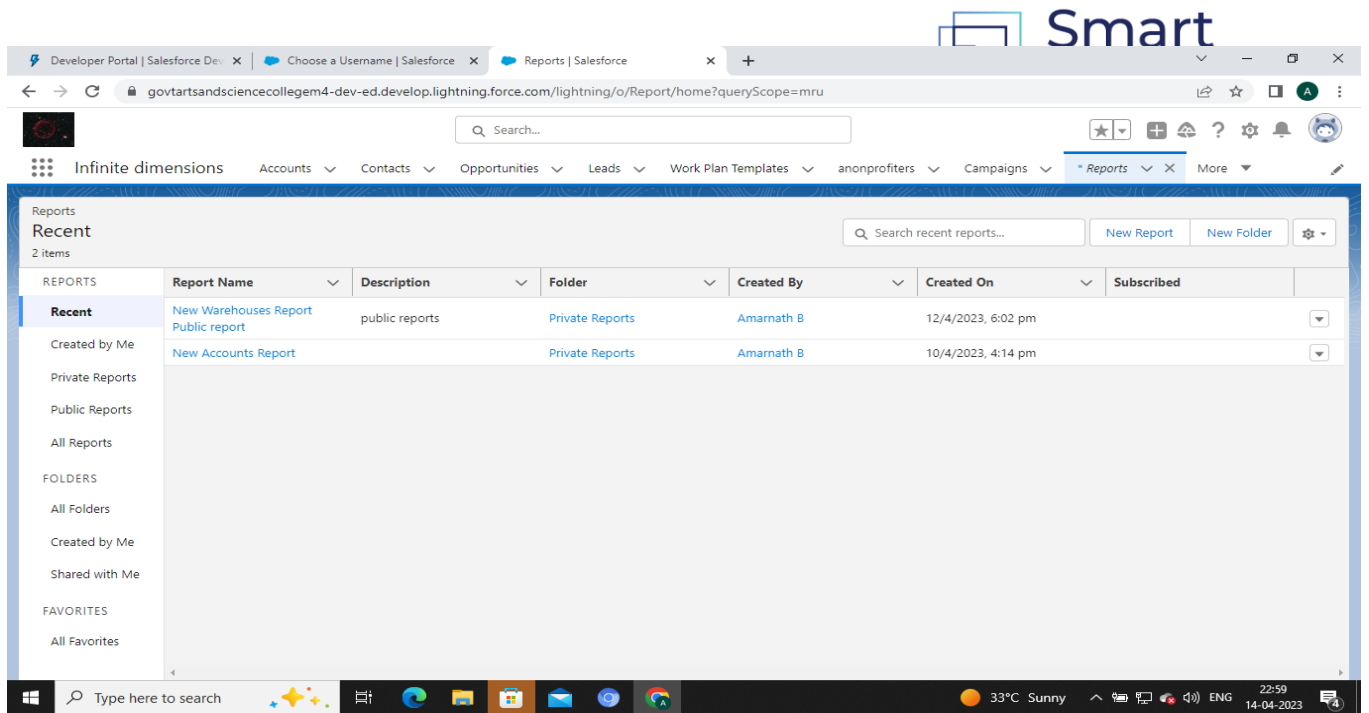
Search this list...

	Opportunity Name	Account Name	Account Site	Stage	Close Date	Opportunity O...
1	INFINITE DIMENSIONS-	INFINITE DIMENSIONS		Prospecting	30/06/2023	AB
2	INFINITE DIMENSIONS-	INFINITE DIMENSIONS		Closed Won	13/04/2023	AB
3	ULTIMATE IN RETAILATION	Amarnath and team		Closed Won	13/04/2023	AB

Type here to search

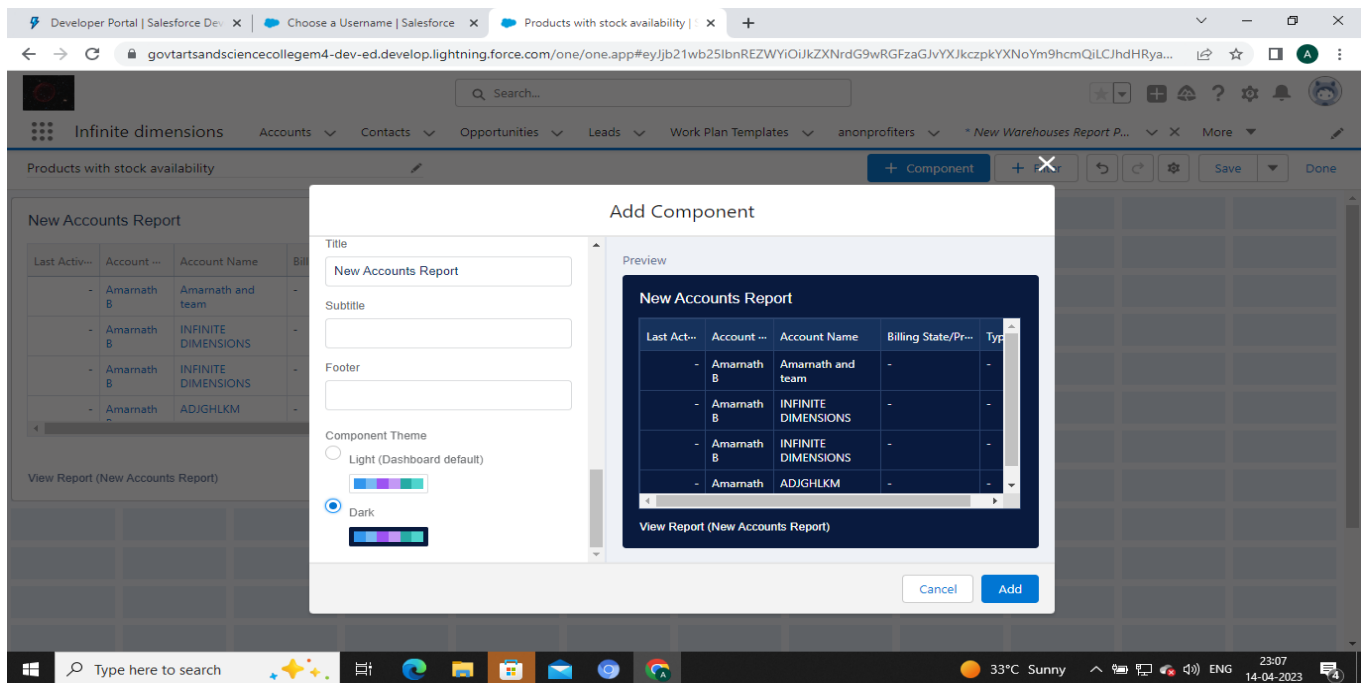
INR/USD -0.25%

22:54  
14-04-2023



## MILESTONE-8:

## DASHBOARDS:



## 4.TRIALHEAD PROFILE PUBLIC URL:

TEAM LEADER : <https://trailblazer.me/id/amarb40>

TEAM MEMBER 1 : <https://trailblazer.me/id/cponraj>

TEAM MEMBER 2 : <https://trailblazer.me/id/skaniskha>

TEAM MEMBER 3 : <https://trailblazer.me/id/sshajitha>

TEAM MEMBER 4 : <https://trailblazer.me/id/ysree>

TEAM MEMBER 5 : <https://trailblazer.me/id/vijav24>

#### 4. ADVANTAGES AND DISADVANTAGES:

##### ADVANTAGES OF THE PROJECT:

- 1.A Cooperated Team Work
- 2.Fun Learning And Easy Way To Learn
- 3.Value For Time
- 4.Knowledge Gaining
- 5.Increases confidences on IT Field Work
- 6.It Paves The Way For More Oppurtunities

##### DISADVANTAGES OF THE PROJECT:

- 1.Affects Leadership
- 2.Requirement Of More Learning Sources
- 3.Very Short Span Of Time
- 4.Low Doubt Clearance Percentage
- 5.Some Steps Are Stagnant And Empty

6.Lacking More Time For Not-working Milestones(Example: milestone 7,  
validation rule Error Formula,Report And Dashboard).

THANK YOU