



# RETAIL MANAGEMENT APPLICATION USING SALESFORCE

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.

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Type

## Retail Management Application Using Salesforce

Milestone:1

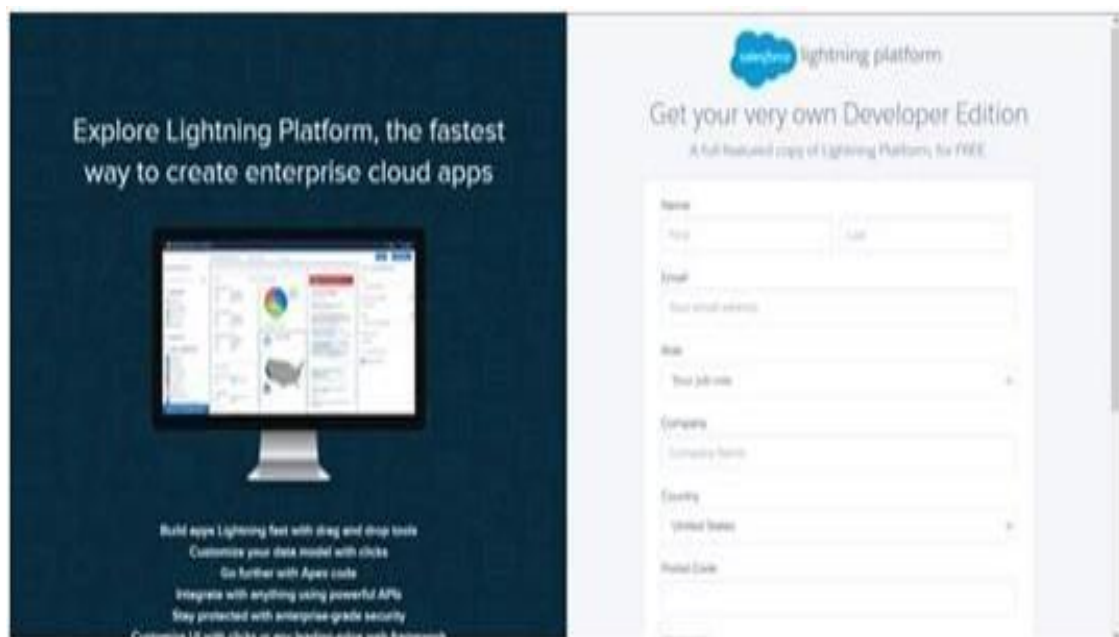
Activity:1

Create a Developer salesforce.com

1. Go to [developers.salesforce.com](https://developers.salesforce.com)
2. click on sign up.
3. On the sign up form, enter the following details :

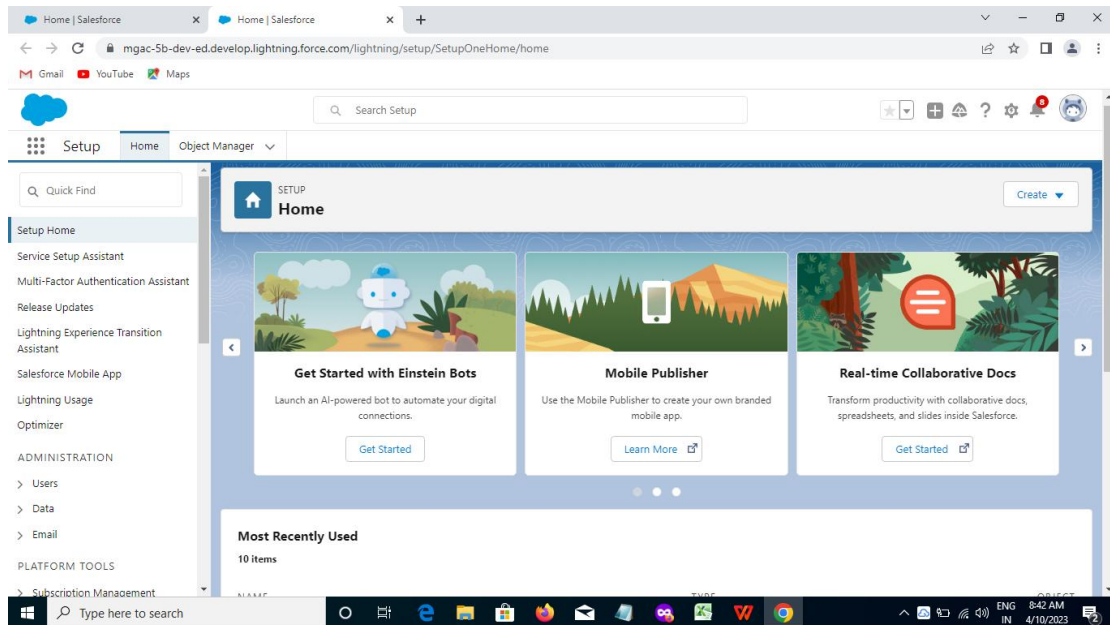
- 1.First name&Last name
- 2.Email
- 3.Role:Developer
- 4.Company: CollegeName
- 5.Counter:India
- 6.PostalCode:pin code
- 7.Username:should be a combination of your name and company This need not be an actual email id you can give the format:  
[username@organisation.com](mailto:username@organisation.com)

Click On Sign Up After Filling These.



## Login To Your Salesforce Account

1. Go to salesforce .com and click on login.
2. Enter the username and password that you just created.
3. After login this is the home page which you will see.



## Milestone:2 Objects:

### Activity:1

## Creation of object Dispatch/tracking

1. Navigate to setup and select and select object manager.

Home | Salesforce x Object Manager | Salesforce x +

mgac-5b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home

Gmail YouTube Maps

Search Setup

Setup Home Object Manager

SETUP  
**Object Manager**  
51+ Items, Sorted by Label

Quick Find Schema Builder Create

Custom Object  
Custom Object from Spreadsheet

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED
Account	Account_c	Custom Object		06/04/2023
Account	Account	Standard Object		
Activity	Activity	Standard Object		
Alternative Payment Method	AlternativePaymentMethod	Standard Object		
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object		
Appointment Invitation	AppointmentInvitation	Standard Object		
Appointment Invitee	AppointmentInvitee	Standard Object		
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object		
Asset	Asset	Standard Object		

javascript:void(0);

Type here to search

ENG 8:43 AM 4/10/2023

Home | Salesforce x New Custom Object | Salesforce x +

mgac-5b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new

Gmail YouTube Maps

Search Setup

Setup Home Object Manager

SETUP  
**New Custom Object**

Custom Object Definition Edit Save Save & New Cancel

Custom Object Information # Required Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label Example: Account

Plural Label Example: Accounts

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

Object Name Example: Account

Description

Context-Sensitive Help Setting

☒ Open the standard Salesforce.com Help & Training window

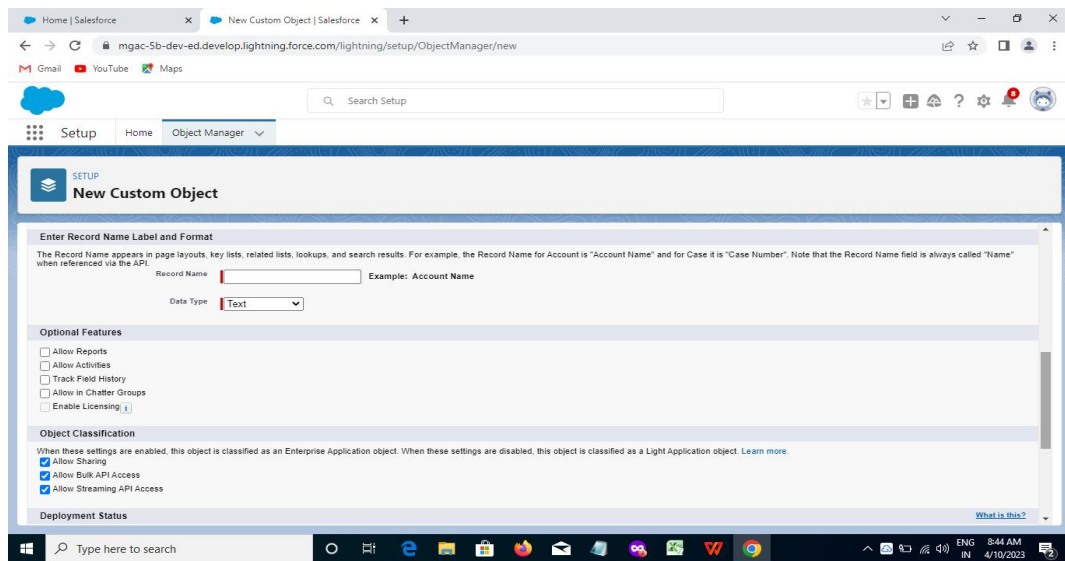
☐ Open a window using a Visualforce page

Content Name --None--

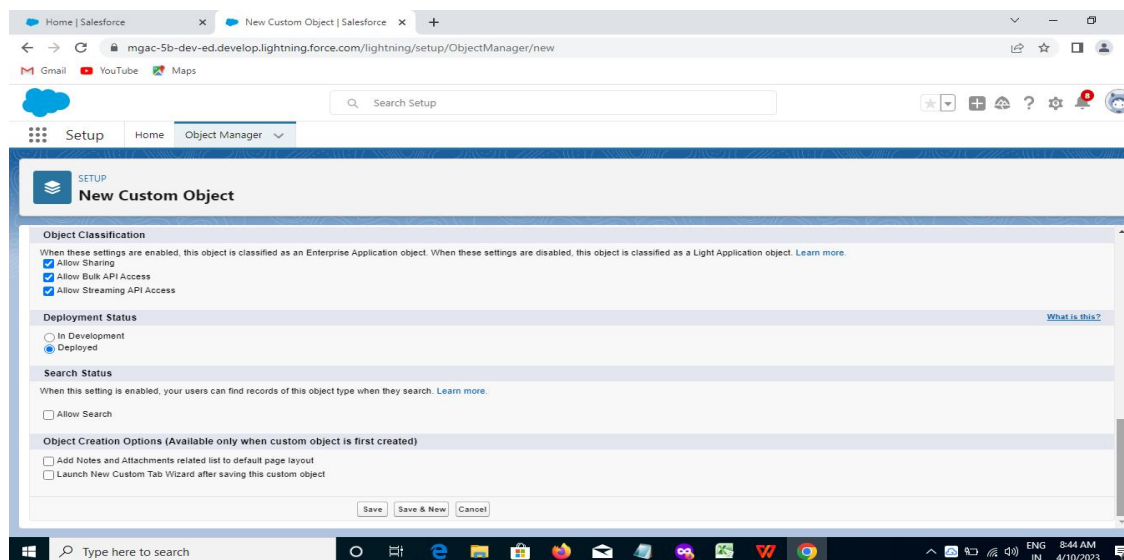
Type here to search

ENG 8:44 AM 4/10/2023

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



3. You will navigate custom object definition edit where you have to this object.



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

6) And the data type has text.

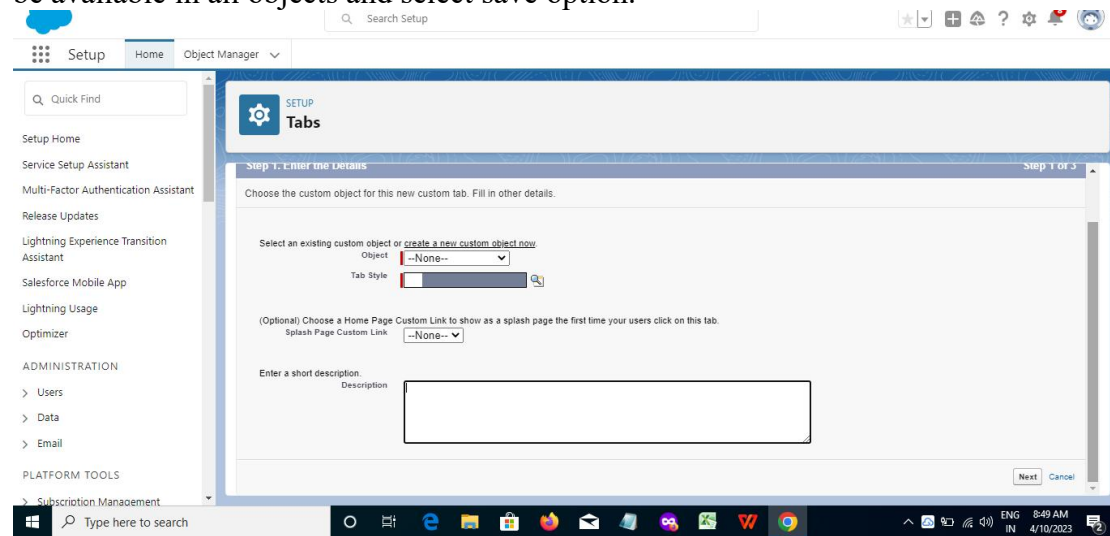
7) In deployment status select deployed option.

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 text.

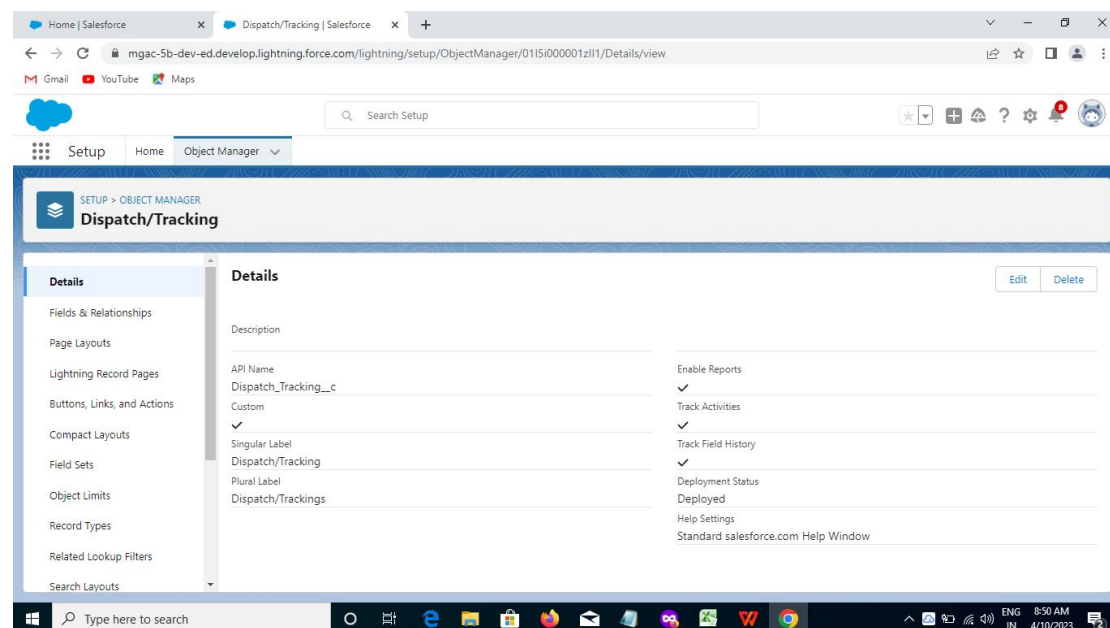
10) After tab selection you will be navigated to add to profiles select default on click on next.

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.

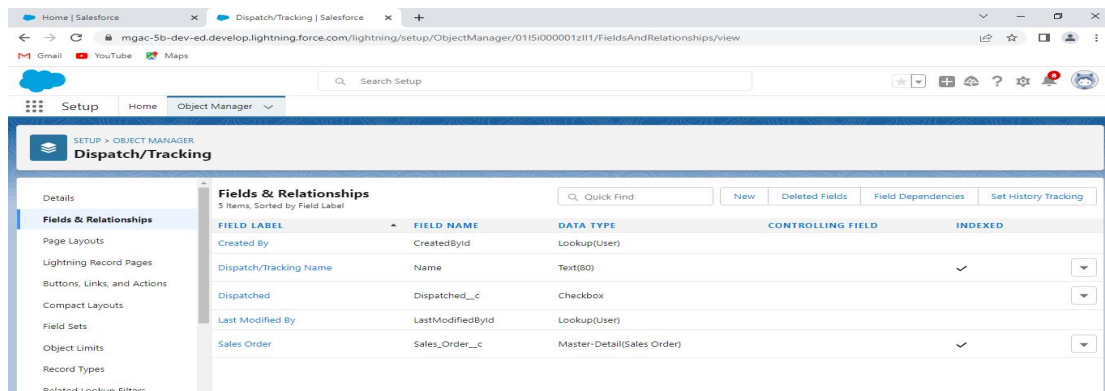


## Activity:2

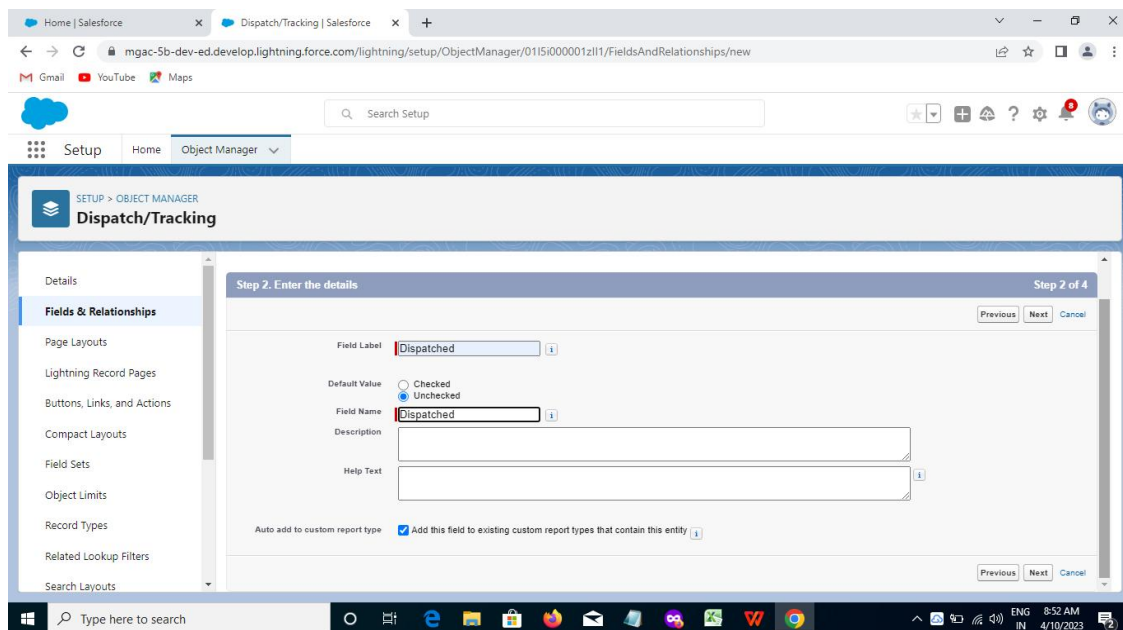
### Creation of Fields available on Dispatch/Tracking



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 so that always require a value in this field in order to save.
- 8) Click next and then click on visible checkbox.
- 9) Click next and save it.



## Milestone : 3 Relationship between objects

### Activity-1:

- 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) Add select fields and relationship and click on new.



- 4) Data type has Master detail relationship.
- 5) And select related to the objects has sales order, click on next.
- 6) You will navigate to the label name it has sales order and click on next.
- 7) select visible for all profiles in field level security and click next and save it.

The screenshot shows the Salesforce Setup interface for the 'Dispatch/Tracking' object. The left sidebar contains a navigation menu with the following items: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Dispatch/Tracking' and contains the following fields and options:

- Field Label:** Sales Order
- Field Name:** Sales\_Order
- Description:** (empty text area)
- Help Text:** (empty text area)
- Child Relationship Name:** Dispatch\_Trackings
- Sharing Setting:** Select the minimum access level required on the Master record to create, edit, or delete related Detail records.
  - ☐ Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.
  - ☒ Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.
- Allow reparenting:** ☐ Child records can be reparented to other parent records after they are created
- Auto add to custom report type:** ☒ Add this field to existing custom report types that contain this entity

At the bottom right of the main content area, there are buttons for 'Previous', 'Next', and 'Cancel'.

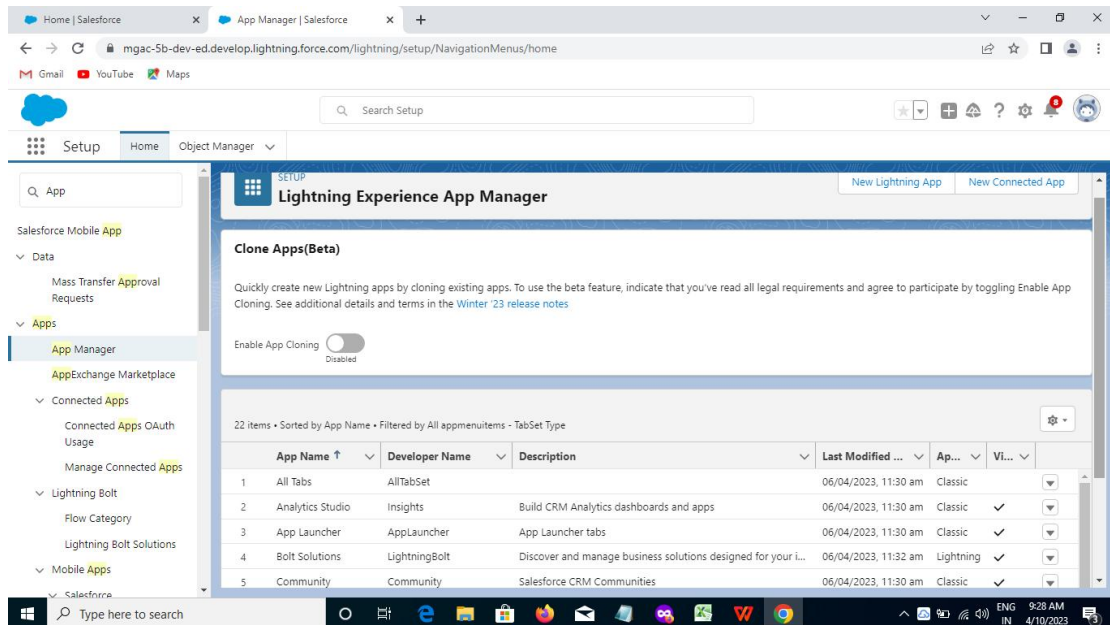


## Milestone - 4 Application :

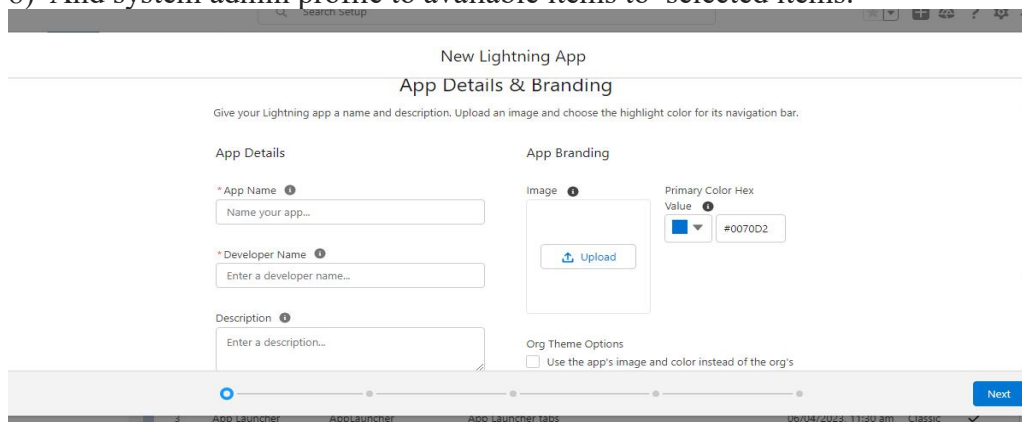
### Activity-1

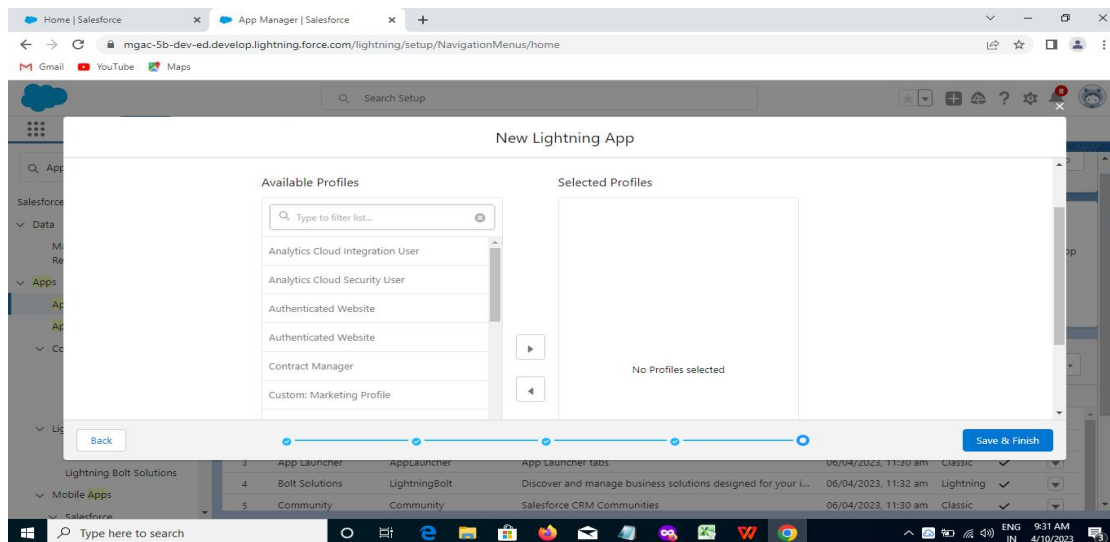
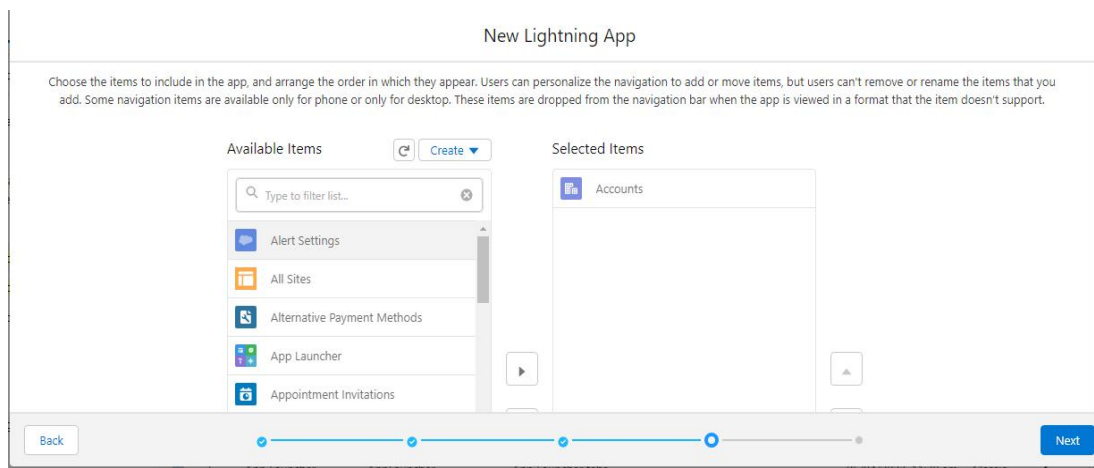
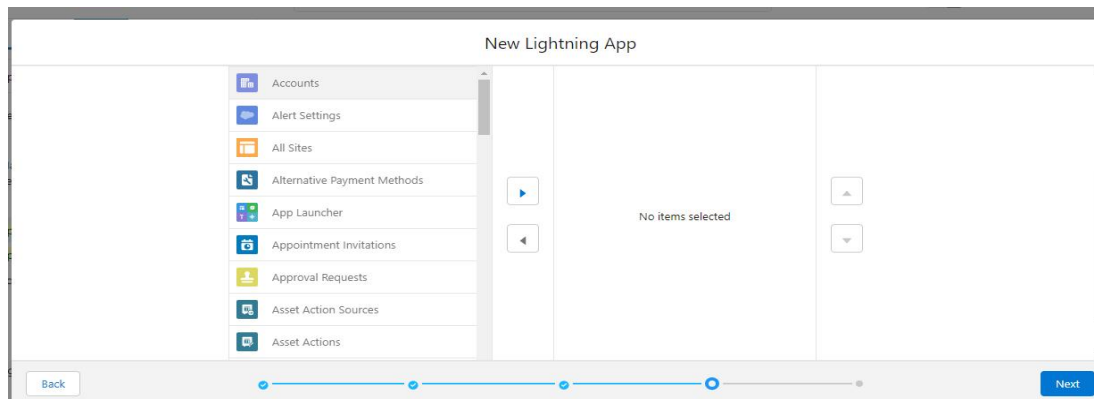
#### Creation of Application

1) Navigate to setup and search for appmanager.



- 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 a navigationstyle-standard navigation ,support from factors desktop @ and select next.
- 6) And move the objects from available items to selected items.
- 7) Accounts ,Contacts,opportunities,Leads,warehouse,dispatch/tracking,to select items.
- 8) And system admin profile to available items to selected items.



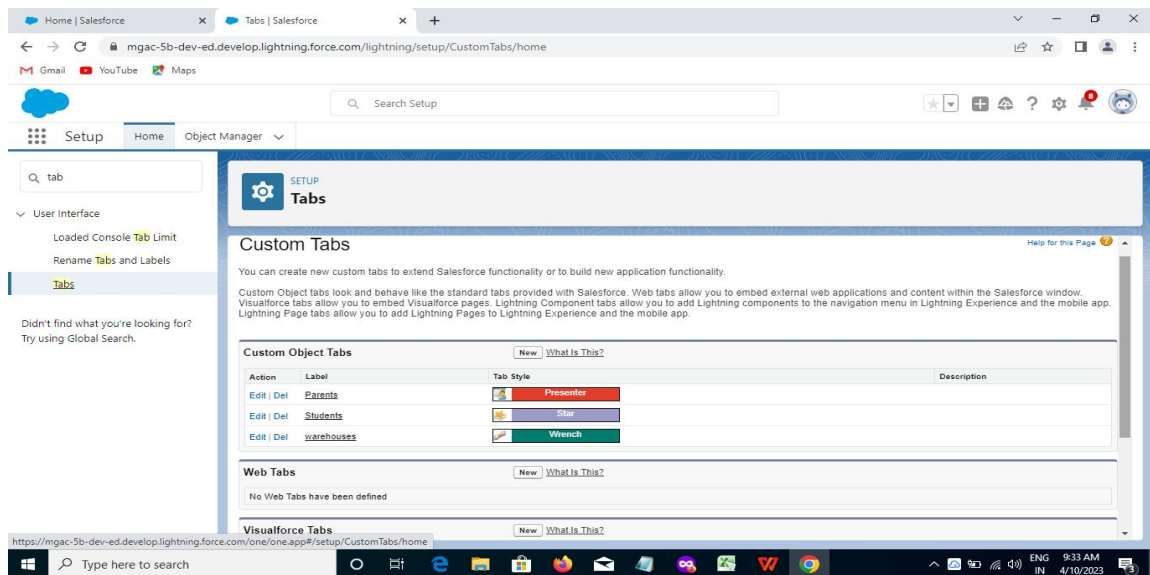


## Milestone-5 Layouts

### Activity-1 :

#### 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 now.
- 3) For object , select warehouses.
- 4) For Tab style,select any icon.
- 5) Leave all defaults as is click Next,then Next ,and Save.
- 6) In the same way create other objects such as students and parents.

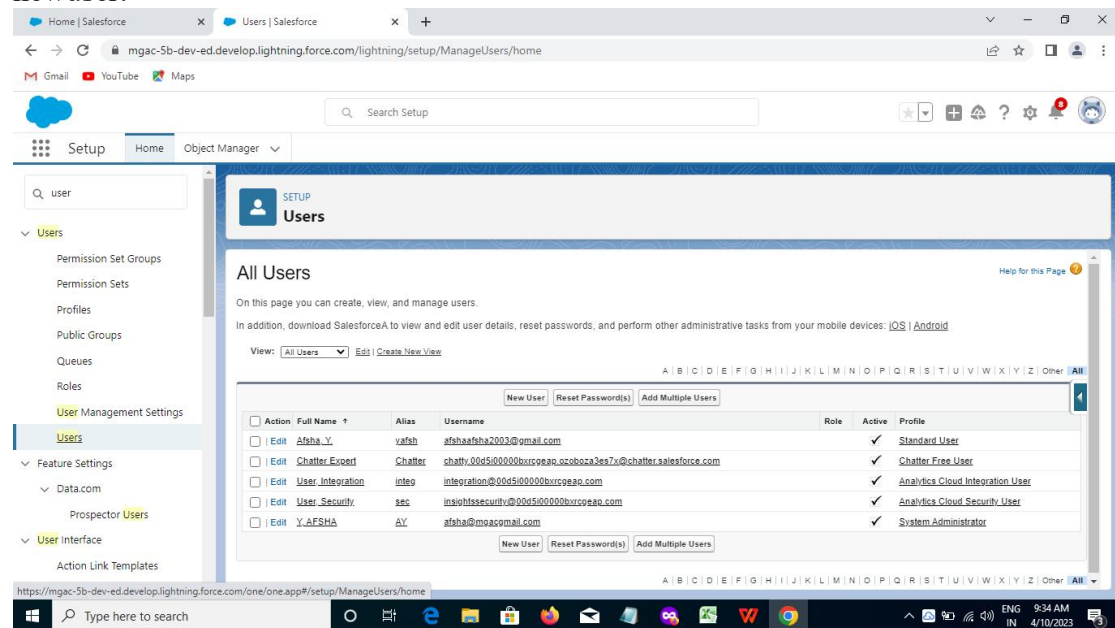


### Milestone-6 User:

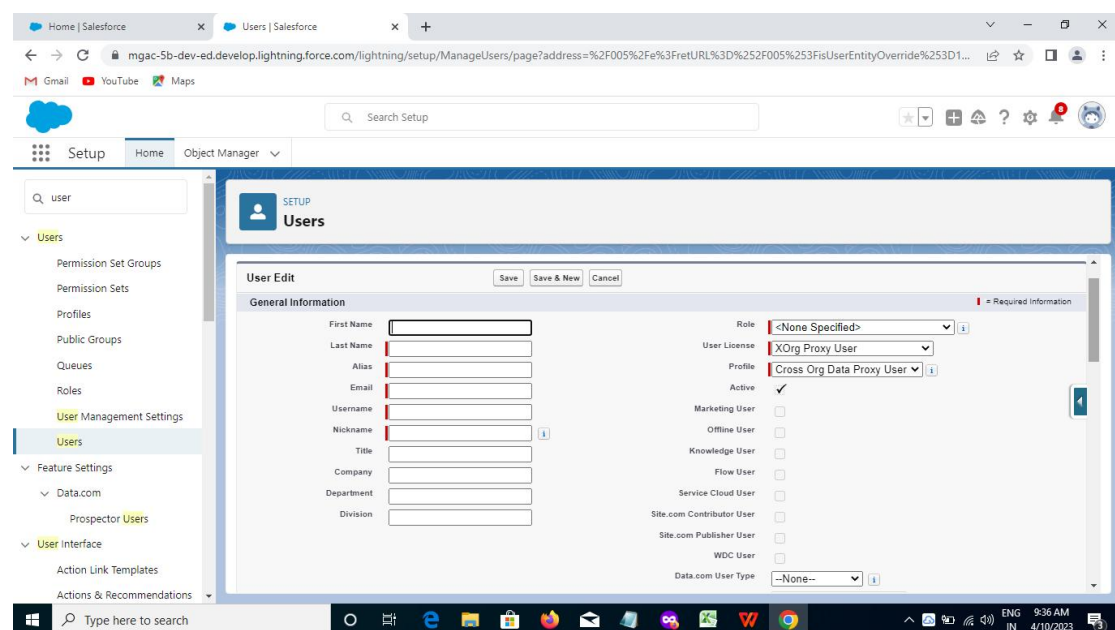
#### Activity-1

- 1) Navigate to setup in quick find search bar

2) Type user in and select it and click on newuser.



- 3) Give the first name and last name.
- 4) Enter your email in the email field .
- 5) Enter username ; it must be unique.(ex:dhiya)
- 6) Select the user licence of salesforce.
- 7) In the profile field select standard platformprofile.
- 8) At the bottom of the page check the boxto generate a new password and notify the user immediatly.

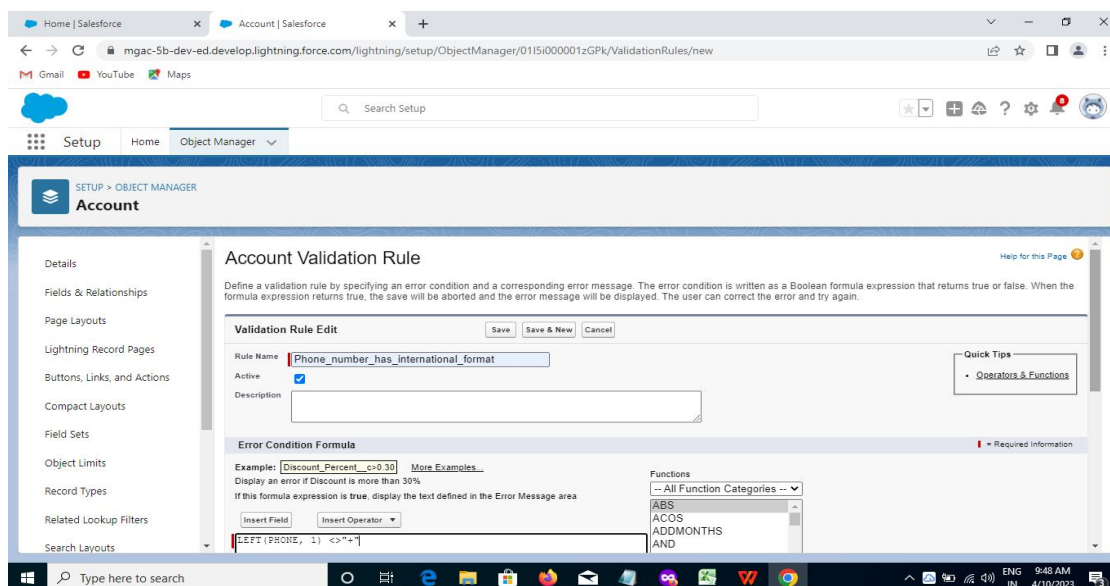
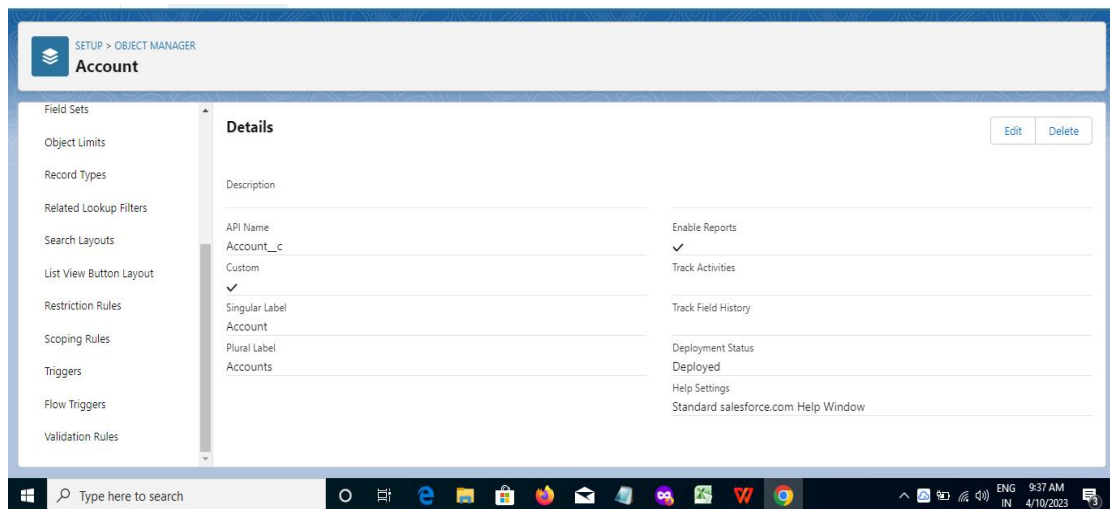


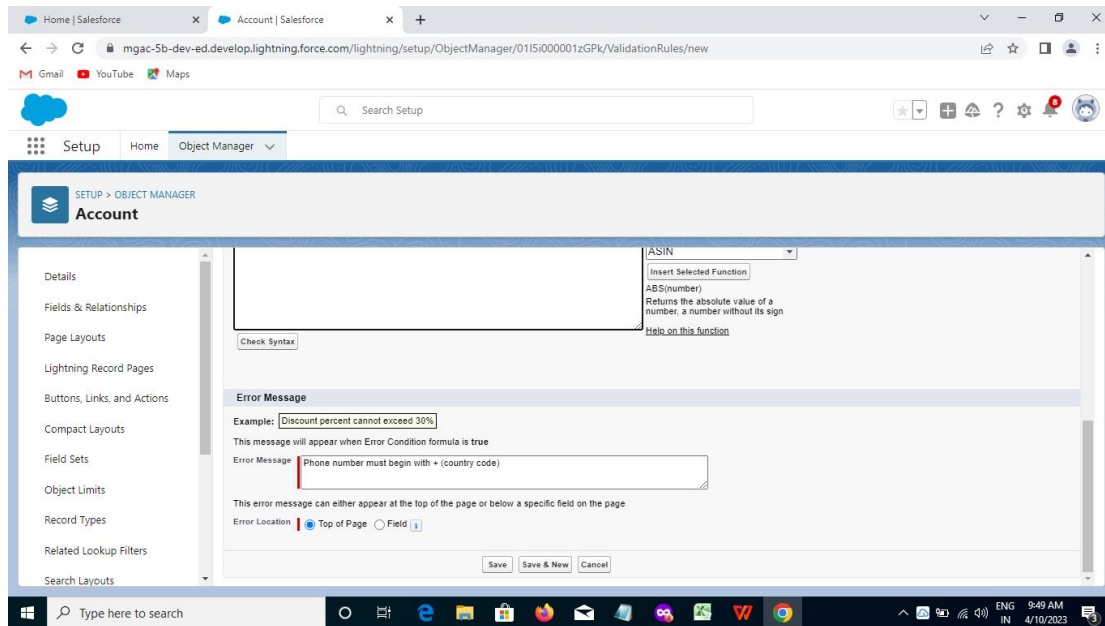
## Milestone-7 Validation Rule

### Activity-1 :

#### 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 lable name and in edit error condition formula give the formula has LEFT(phone,1)<>"+".
- 4) And in error message give the description has phone number must begin with +(countrycode).
- 5) In error location select top of the field and then Save it.

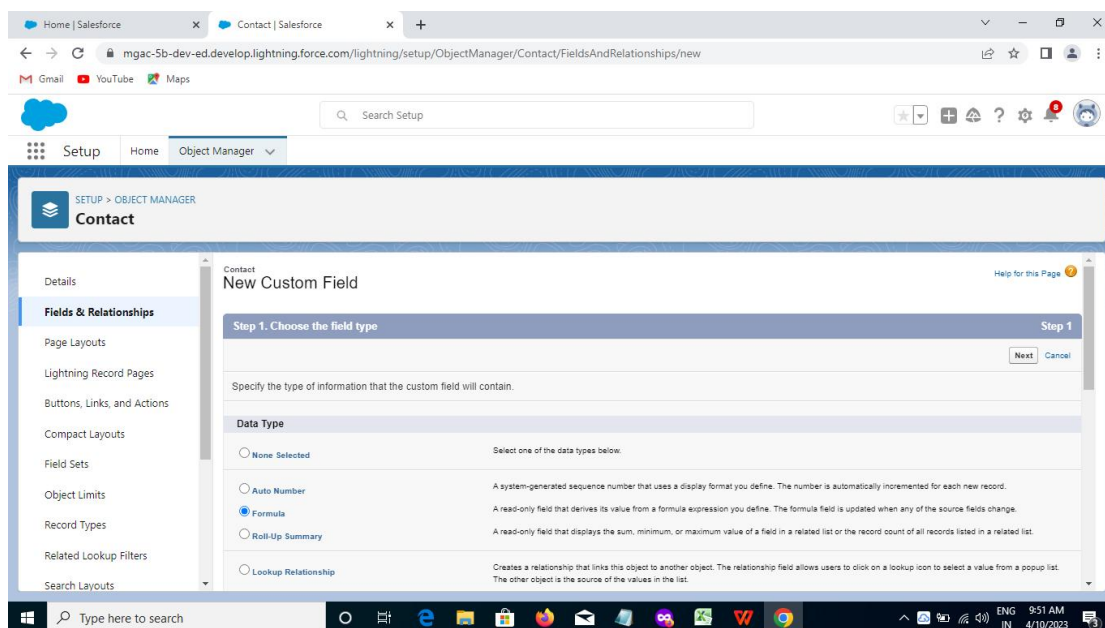




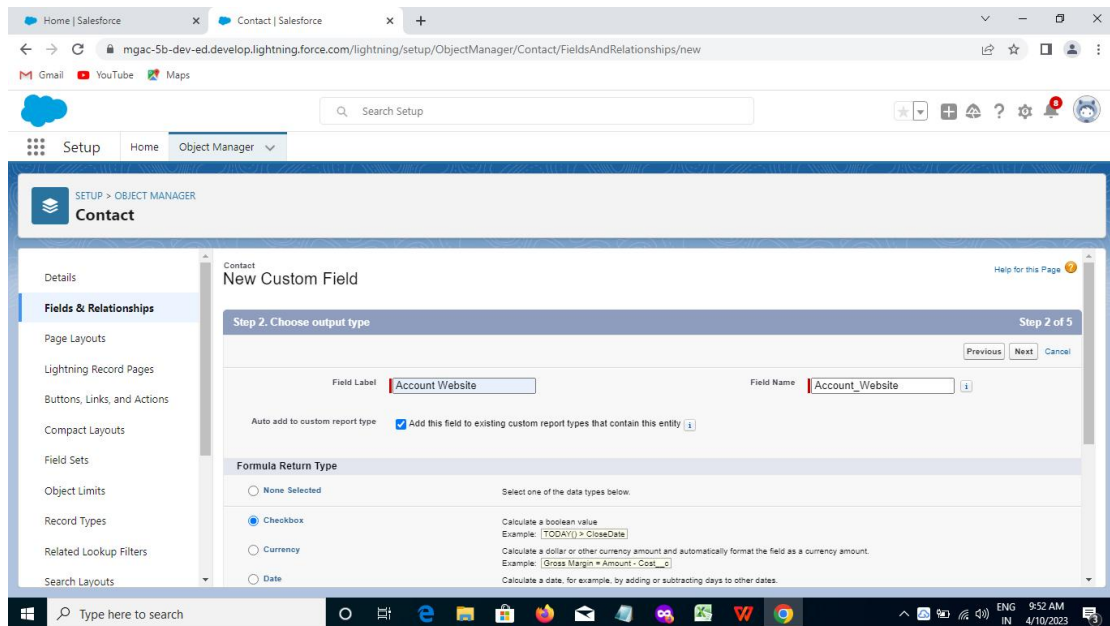
## Activity-2 :

### 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 select data type, formula has datatype.



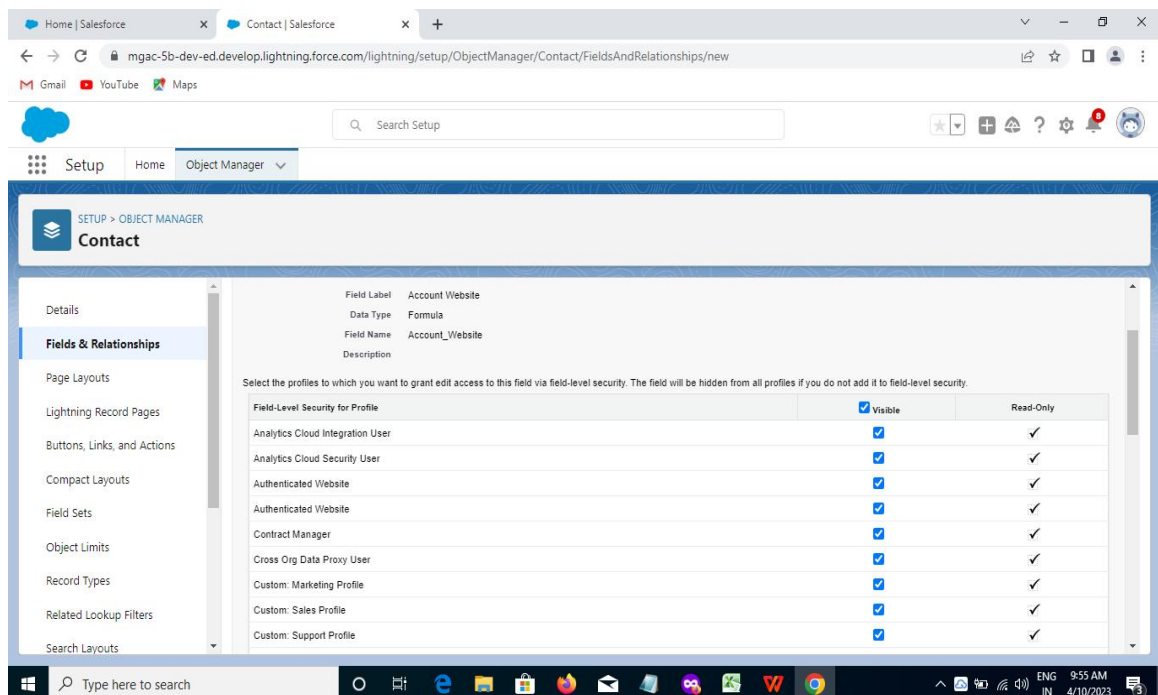




5) And you will navigate to enter the details page where you give the field label.

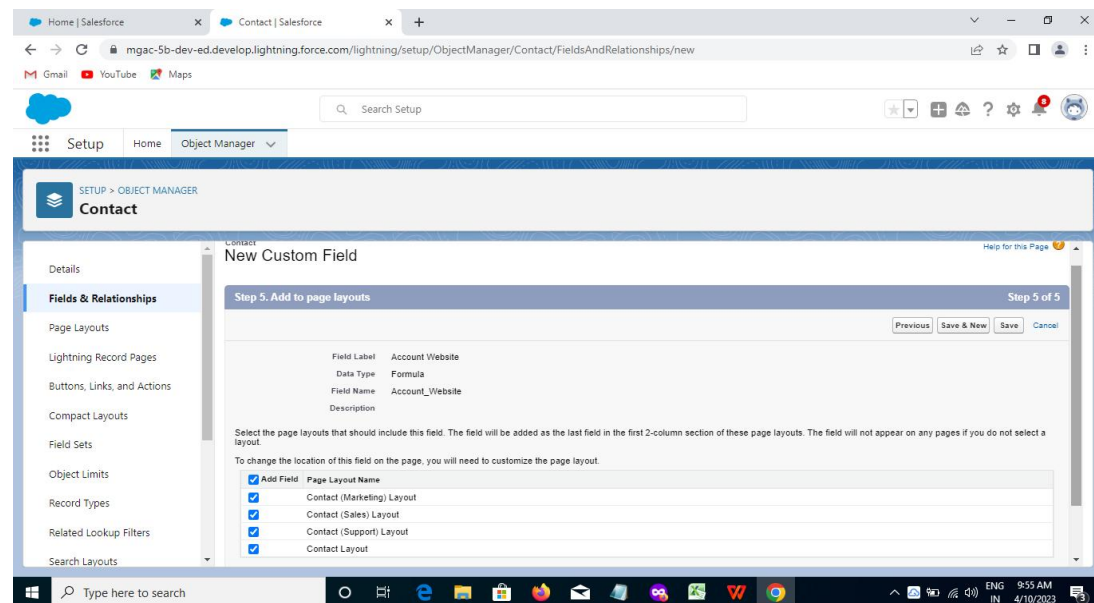
6) And give the label name has Account Website

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





- 9) At the bottom of the object you can field options like required option so that always require a value in this field in order to save.
- 10) Click next you will navigate to field level security click on visible check box so that it is visible to all profiles.
- 11) Select the next option, and then save it.



## Milestone-8 Reports:

### Activity-1

#### Creation of report

- 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 warehouse 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 filter pane available next to the outline in the show me section all my warehouses is selected.
- 9) And in the warehouse created date select date select all time.
- 10) And give the label name products with stock availability.
- 11) Click on save and run for saving the report.

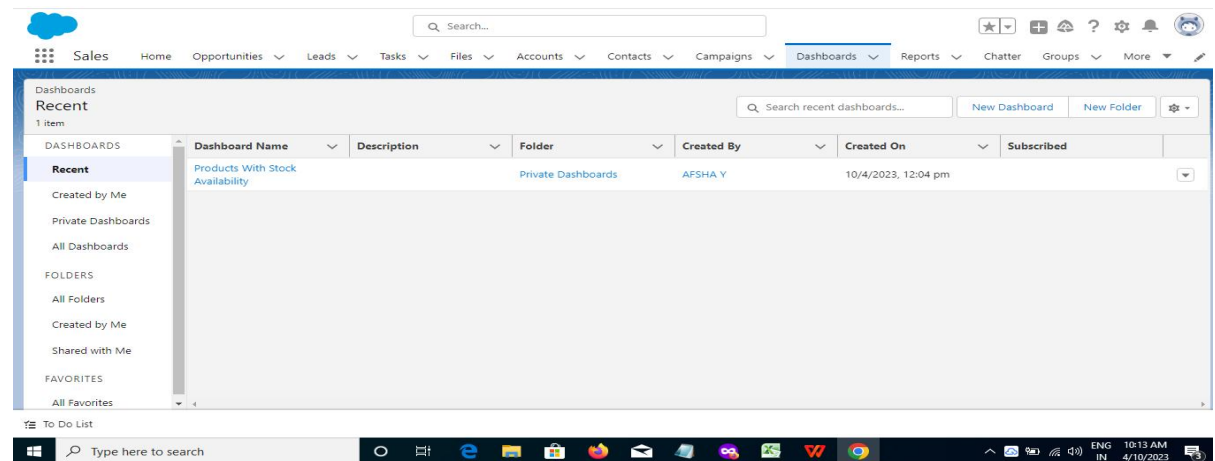


## Milestone-9 Dashboards :

### Activity-1

#### Creation of dashboard

- 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 the report select passport with locations.
- 6) Select the donut chart in display as section.
- 7) Ensure that value is recorded count and sliced by product name.
- 8) Leave the default values.click on add and then save it.

