NAAN MUDHALVAN

PROJECT REPORT

on

[SALESFORCE]

Retail Management Application Using Salesforce

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Developer (Short Term)

Introduction:

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.

Project Goals:

- Improve customer satisfaction and loyalty by providing a seamless shopping experience.
- Increase sales revenue and conversion rates.
- Ensure that employees are proficient in using the system, leading to high user adoption rates.

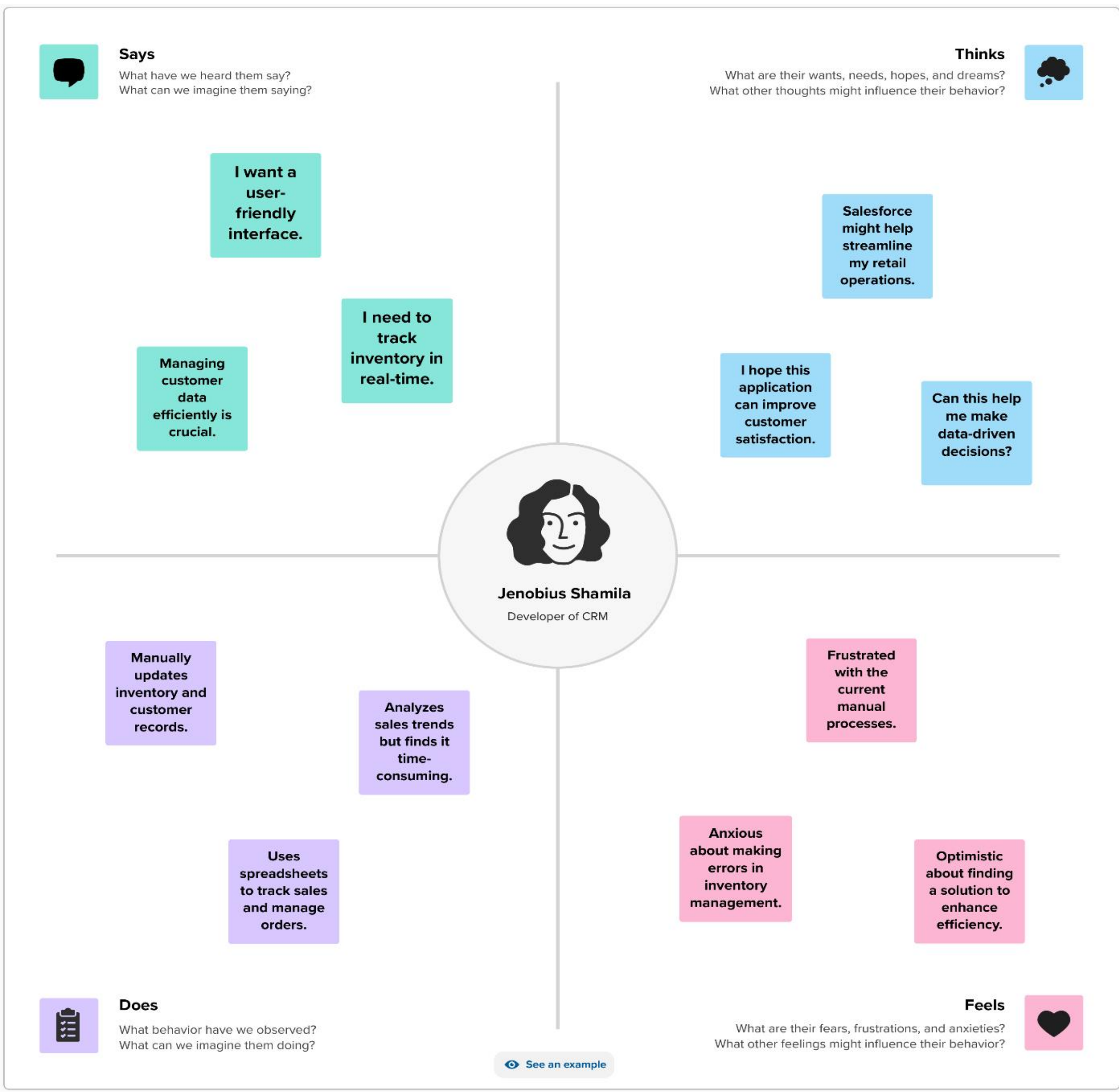
Scope:

- Develop customer management, inventory tracking, and sales processing modules within the Salesforce platform.
- Enable integration with online stores and various sales channels for unified inventory and sales management.
- Implement real-time sales reports, customer behavior analytics, and inventory turnover analysis tools for data-driven decision-making.

Problem Definition & Design Thinking:

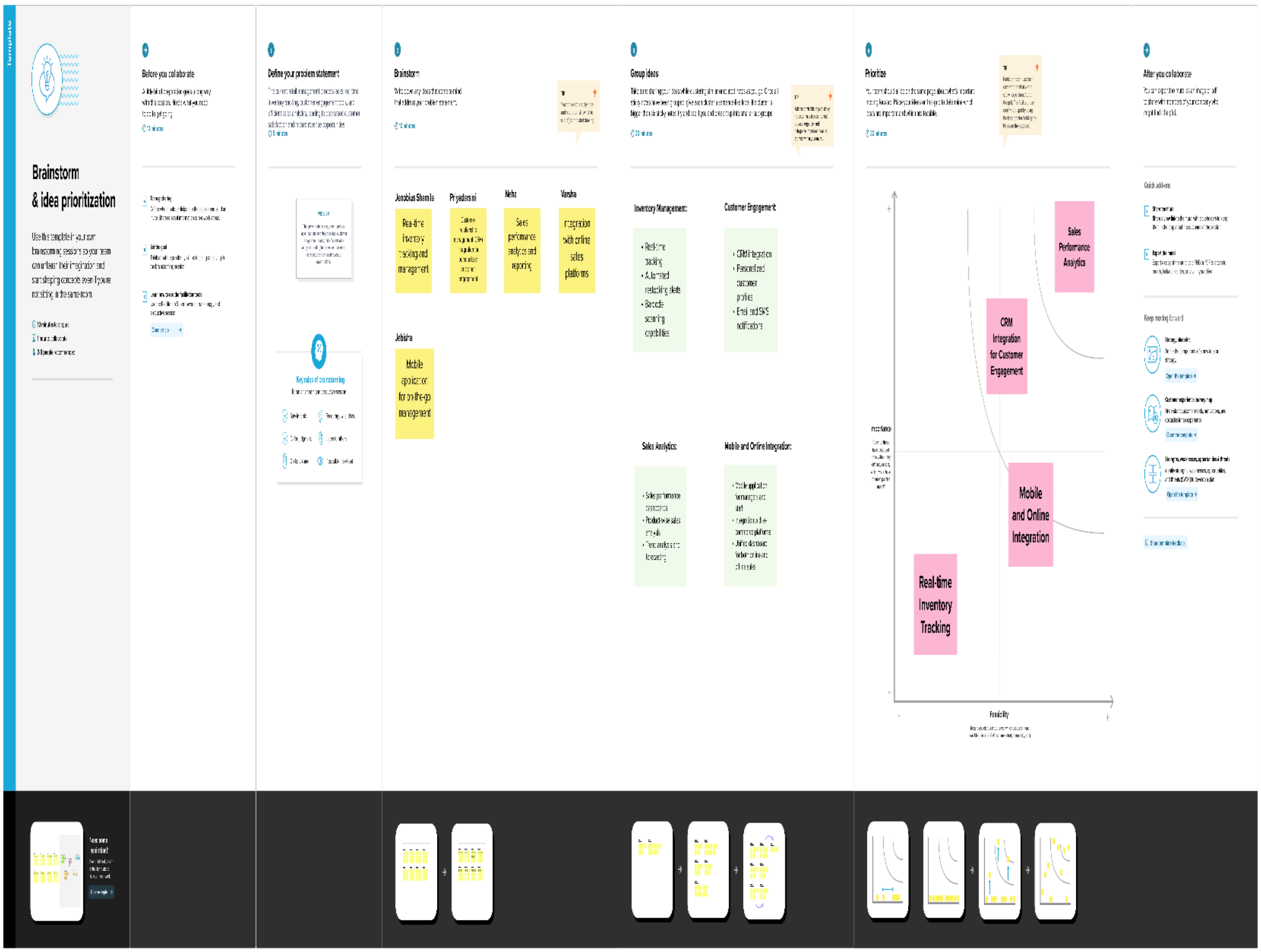
Empathy Map:

An empathy map is a tool used to gain a deeper understanding of users or customers by exploring their thoughts, feelings, actions, and experiences related to a particular situation or context.



Ideation & Brainstorming:

Generating creative solutions to address the identified challenges, using brainstorming and collaboration.



Milestone- 01 [Creation of developer account]

1.Go to developer.salesforce.com/signup

2.Click on sign up.

3.On the sign up form, enter the following details:

a) First name: **Jenobius Shamila**

b) Last name: **J**

c) Email: **jenobiusjsj@gmail.com**

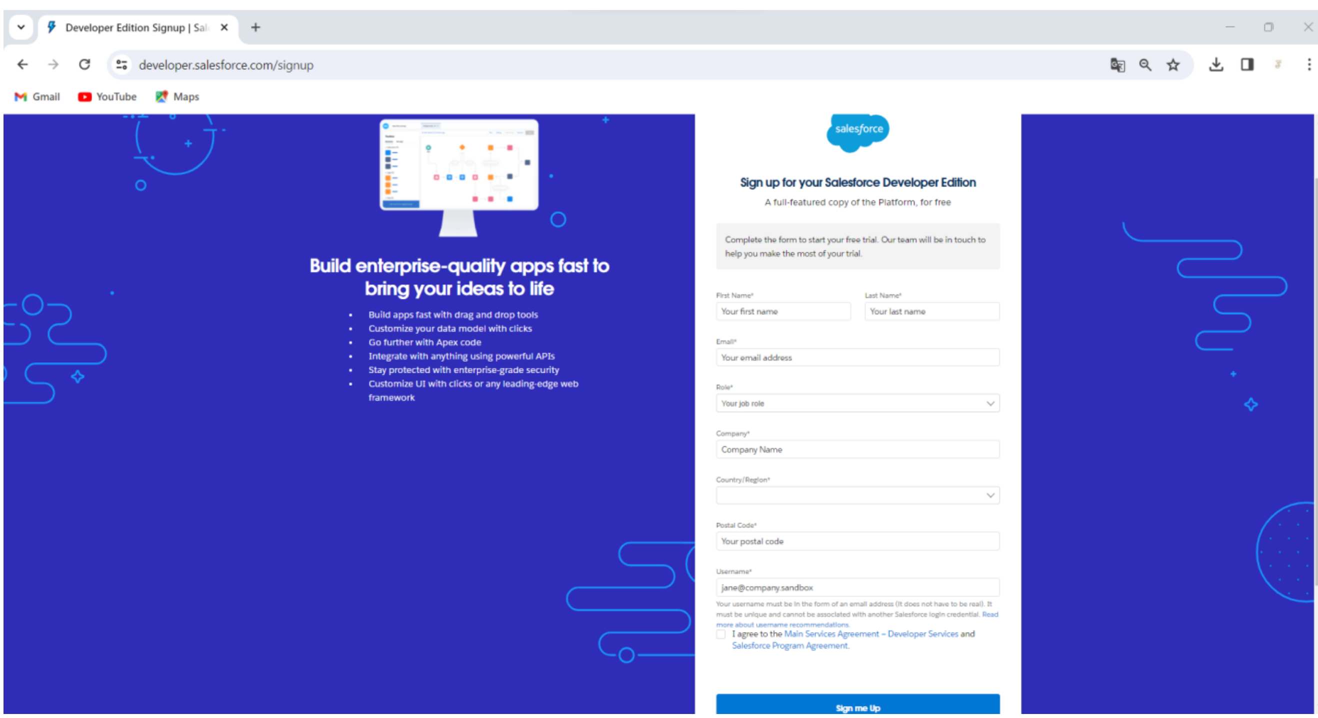
d) Role: **Developer**

e) Company: **Ponjesly College of Engineering**

f) County: **India**

g) Postal Code: **629180**

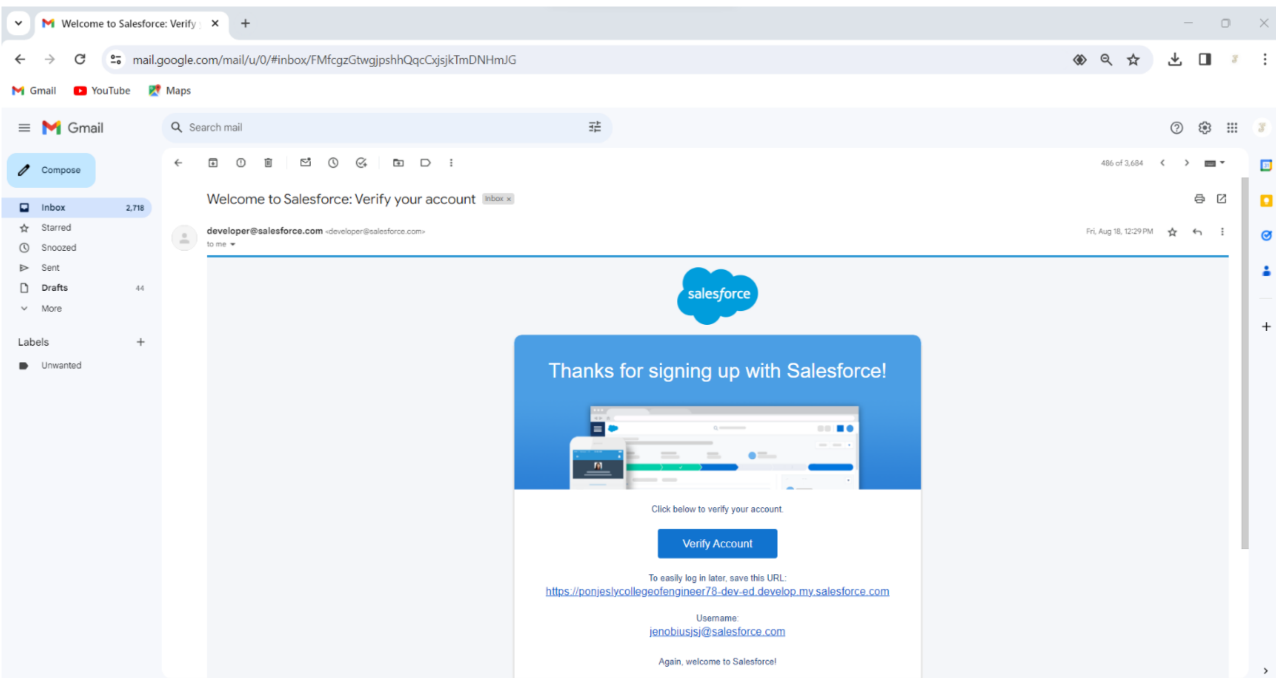
h) Username: **jenobiusjsj@salesforce.com**



Account Activation

Go to the inbox of the email that you used while signing up.

Click on the verify account to activate your account.

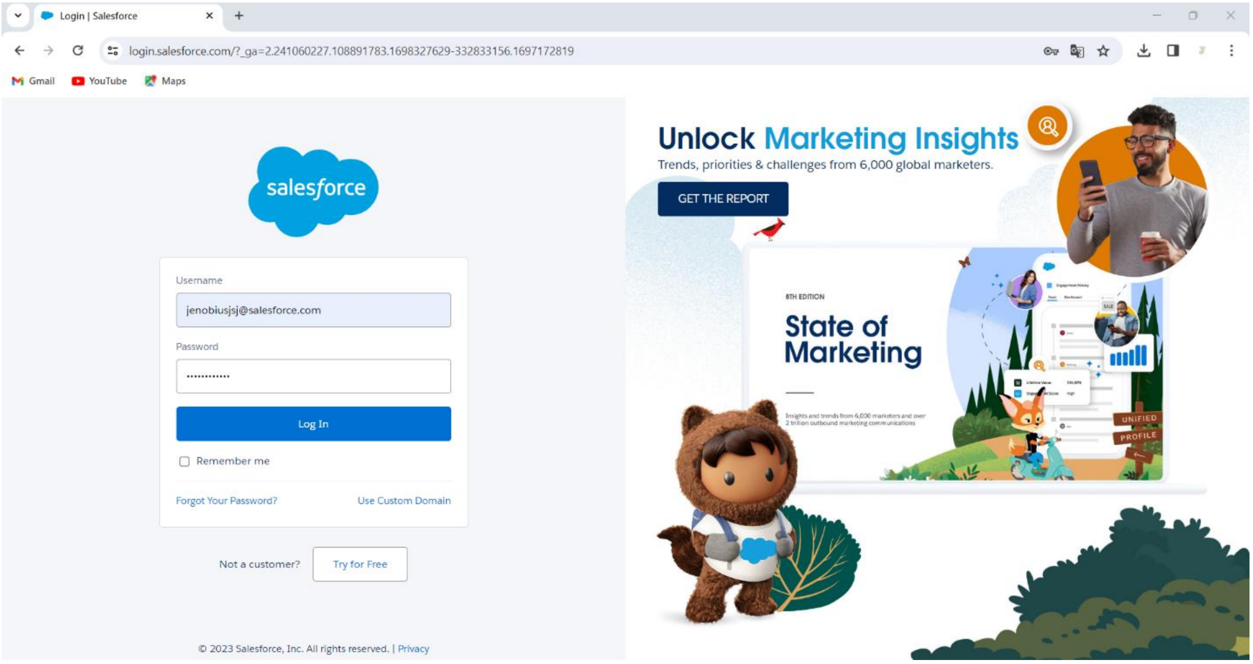


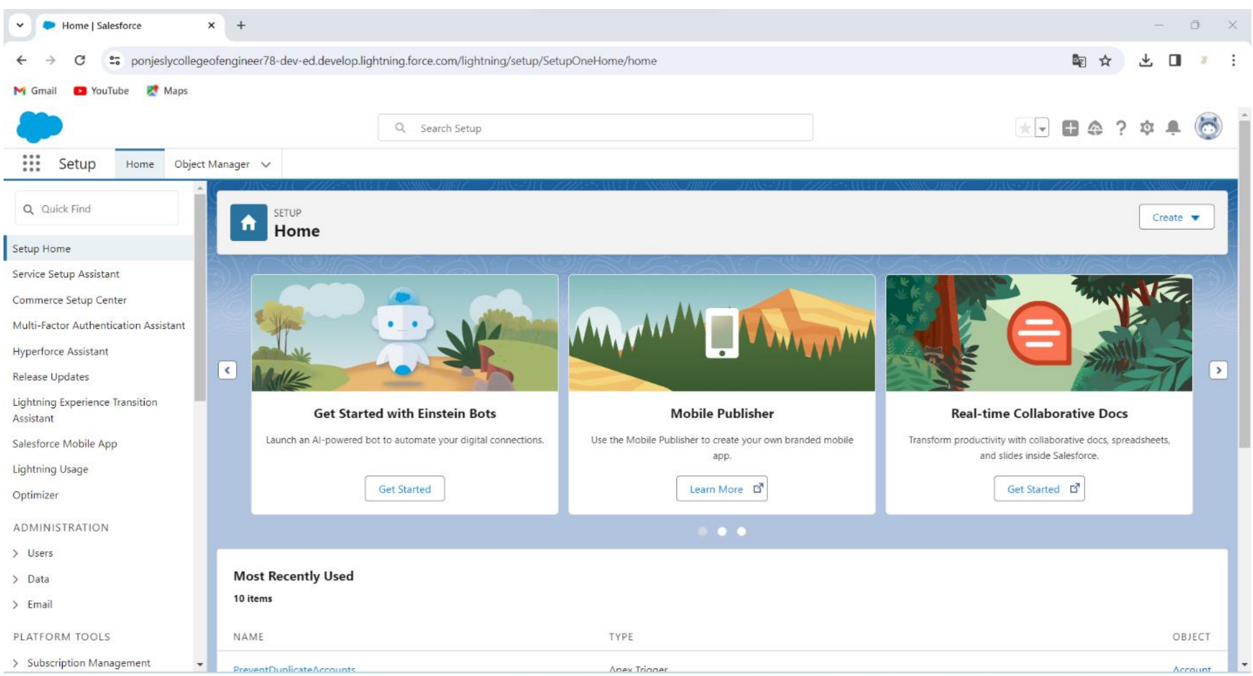
Login to Your Salesforce Account

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.


Login | Salesforce
login.salesforce.com/?_ga=2.241060227.108891783.1698327629-332833156.1697172819
Gmail
YouTube
Maps
salesforce
Username
jenobiusjsj@salesforce.com
Password
Log In
Remember me
Forgot Your Password?
Use Custom Domain
Not a customer?
Try for Free
© 2023 Salesforce, Inc. All rights reserved. | Privacy
Unlock Marketing Insights
Trends, priorities & challenges from 6,000 global marketers.
GET THE REPORT
8TH EDITION
State of Marketing
UNIFIED
PROFILE


Home | Salesforce
ponjeslycollegeofengineer78-dev-ed.develop.lightning.force.com/lightning/setup/SetupOneHome/home
Gmail
YouTube
Maps
Search Setup
Setup
Home
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Commerce Setup Center
Multi-Factor Authentication Assistant
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Data
Email
PLATFORM TOOLS
Subscription Management
SETUP
Home
Create
Get Started with Einstein Bots
Launch an AI-powered bot to automate your digital connections.
Get Started
Mobile Publisher
Use the Mobile Publisher to create your own branded mobile app.
Learn More
Real-time Collaborative Docs
Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.
Get Started
Most Recently Used
10 items
NAME
TYPE
OBJECT

Milestone- 02 [Object Creation]

Creation of Warehouse Object:

1. Click on the gear icon and then select Setup.

2. Click on the object manager tab just beside the home tab.

3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.

4. On the Custom Object Definition page, create the object as follows:

5. Label: **Warehouse**

6. Plural Label: **Warehouses**

7. Record Name: Warehouse Name

8. **Check** the **Allow Reports**

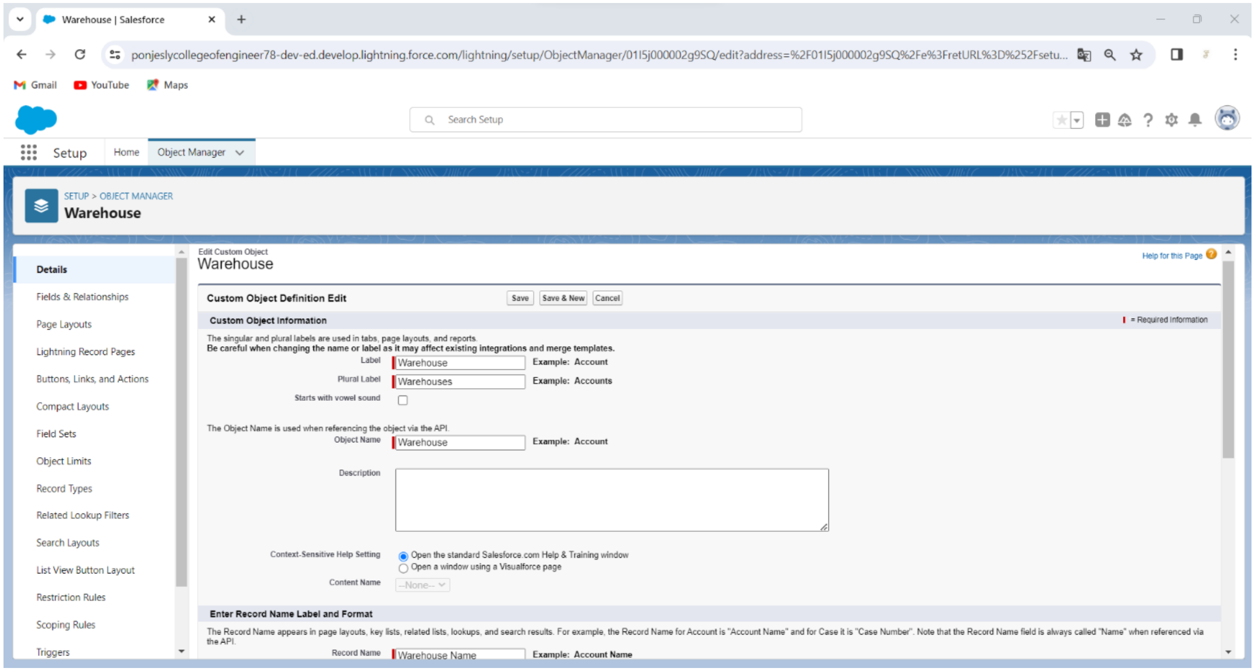
9.Check the **Allow Search**

10.Click Save.

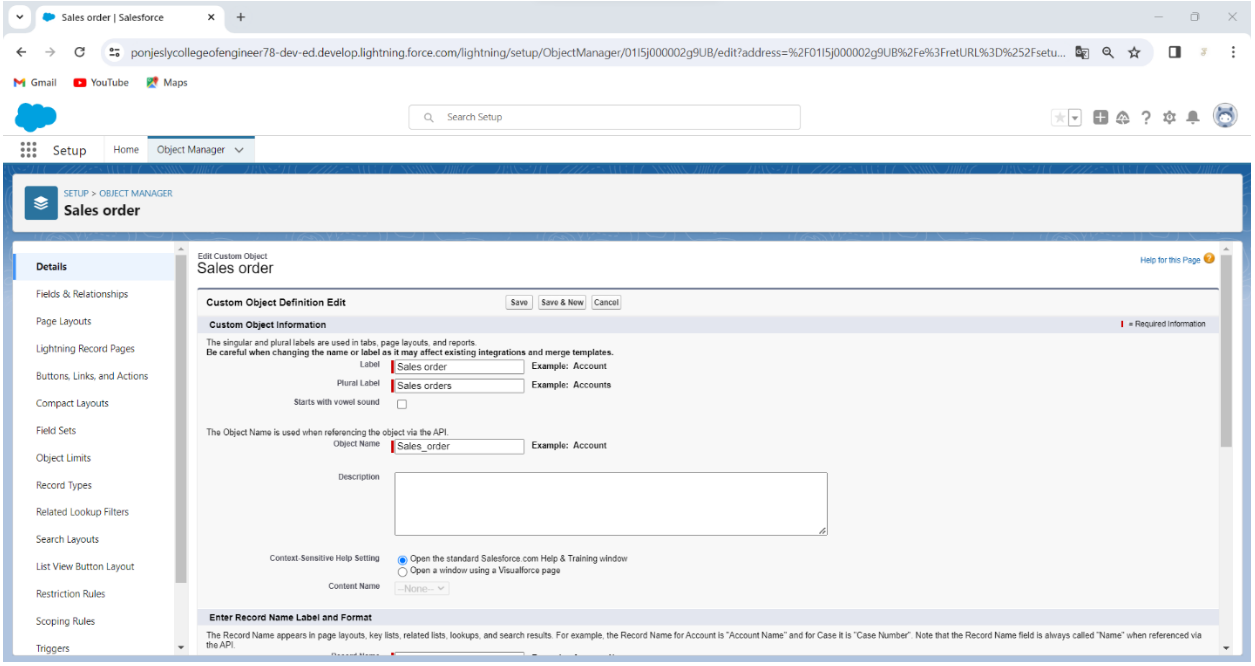
In the same way create **2** more objects as Sales order, Dispatch/Tracking.

Note – While making **Sales order** Object select data type "**Auto Number**" & Record Name- "Sales order Number" in "Enter Record Name Label and Format" Section.

Object Name - Warehouse

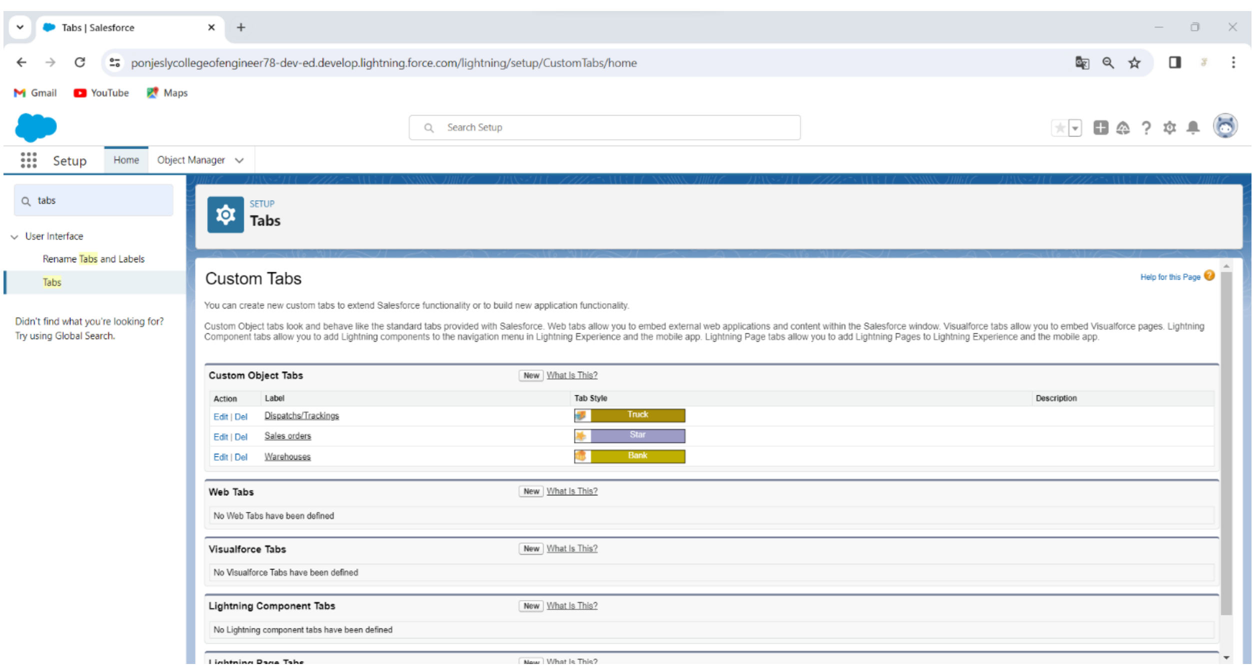


Object Name – Sales Order



Milestone- 03 [Tabs Creation]

1. Enter Tabs in Quick Find and select Tabs.
2. Under Custom Object Tabs, click New.
3. For Object, select Warehouse.
4. For Tab Style, select any icon.
5. Leave all defaults as is. Click Next, Next, and Save
6. In the same way create Tabs for all Custom Objects – Sales order, Dispatch /Tracking.



Milestone- 04 [Lightning App]

1. From Setup, enter App Manager in the Quick Find and select App Manager.

2. Click New Lightning App.

3. Enter **Sales App** as the App Name, then click Next

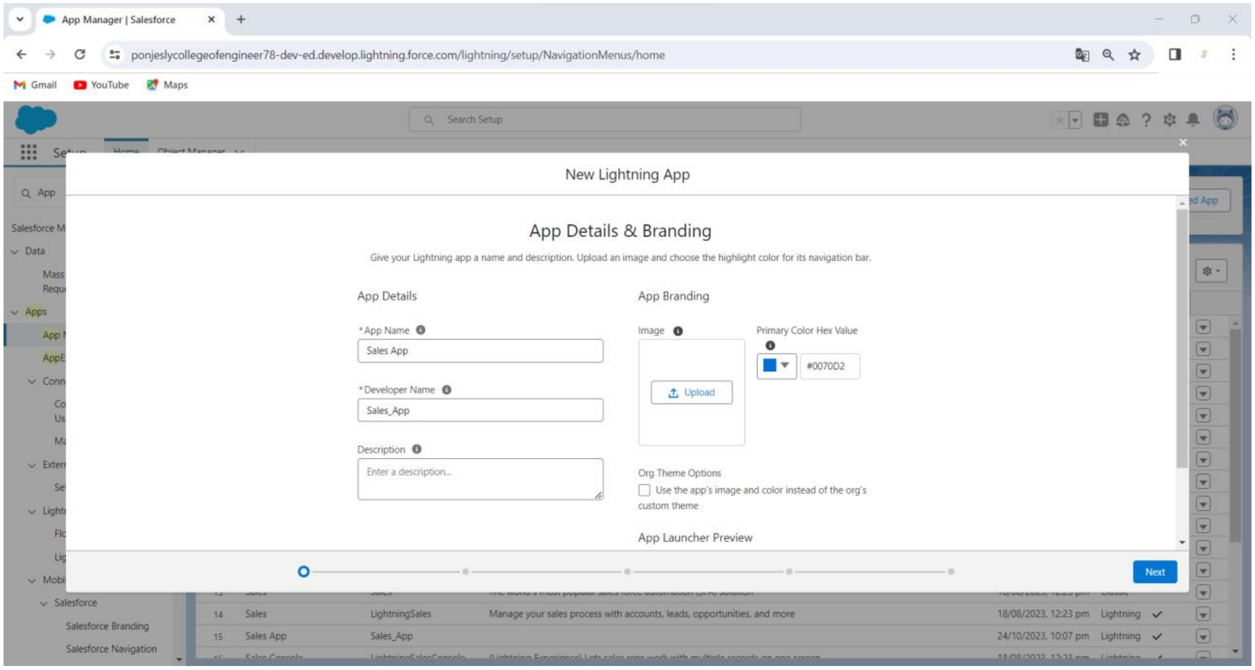
4. Under App Options, leave the default selections and click Next.

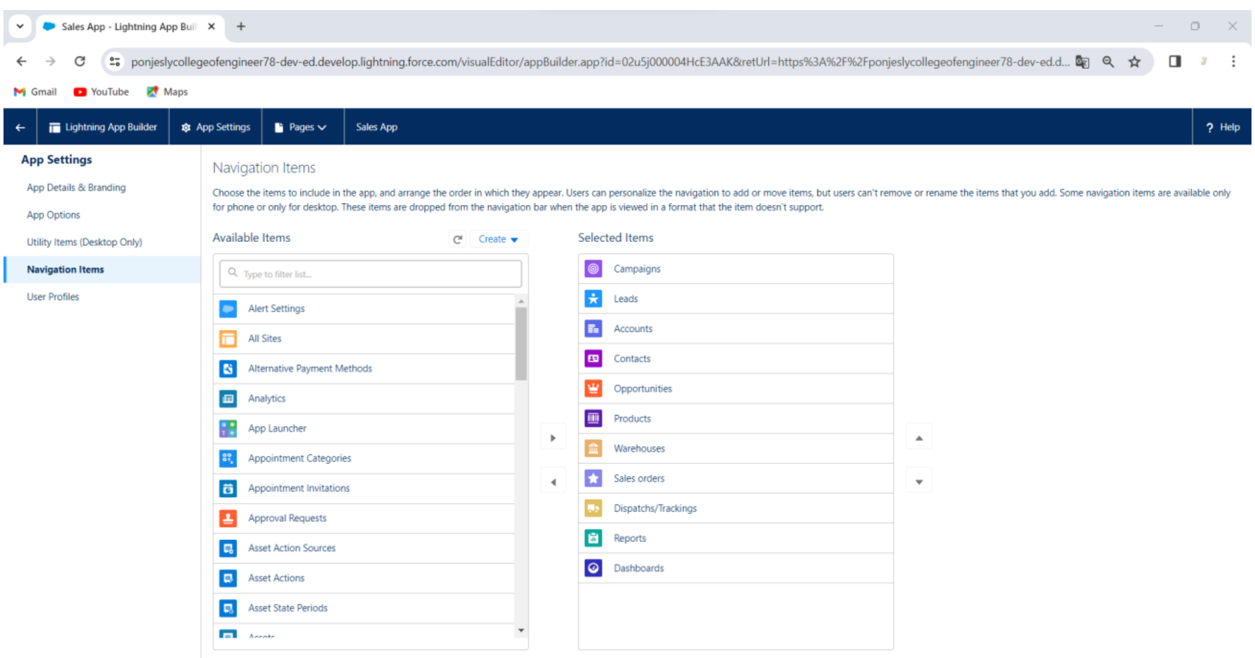
5. Under Utility Items, leave as is and click Next.

6. From Available Items, select **Campaign, Leads, Accounts, Contacts, Opportunities, Products, Warehouse, Sales order, Dispatch/Tracking**, **Reports, and Dashboards** and move them to Selected Items. Click Next.

7. From Available Profiles, select System Administrator and move it to Selected Profiles. Click Save & Finish.

Note – Similarly create **Service App.**

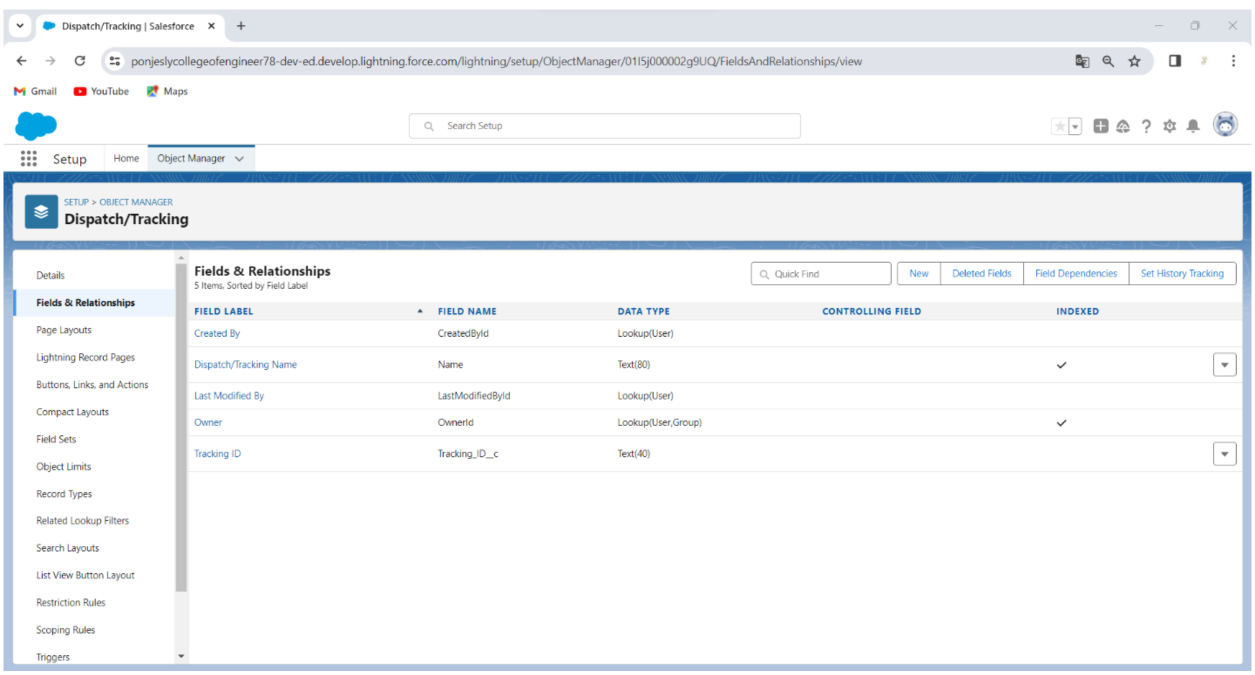

App Manager | Salesforce
ponjeslycollegeofengineer78-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home
New Lightning App
App Details & Branding
Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.
App Details
App Branding
* App Name
Sales App
* Developer Name
Sales_App
Description
Enter a description...
Image
Upload
Primary Color Hex Value
#0070D2
Org Theme Options
Use the app's image and color instead of the org's custom theme
App Launcher Preview
Next


Sales App - Lightning App Builder
Lightning App Builder
App Settings
Pages
Sales App
Help
App Settings
App Details & Branding
App Options
Utility Items (Desktop Only)
Navigation Items
User Profiles
Navigation Items
Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.
Available Items
Create
Alert Settings
All Sites
Alternative Payment Methods
Analytics
App Launcher
Appointment Categories
Appointment Invitations
Approval Requests
Asset Action Sources
Asset Actions
Asset State Periods
Selected Items
Campaigns
Leads
Accounts
Contacts
Opportunities
Products
Warehouses
Sales orders
Dispatchs/Trackings
Reports
Dashboards

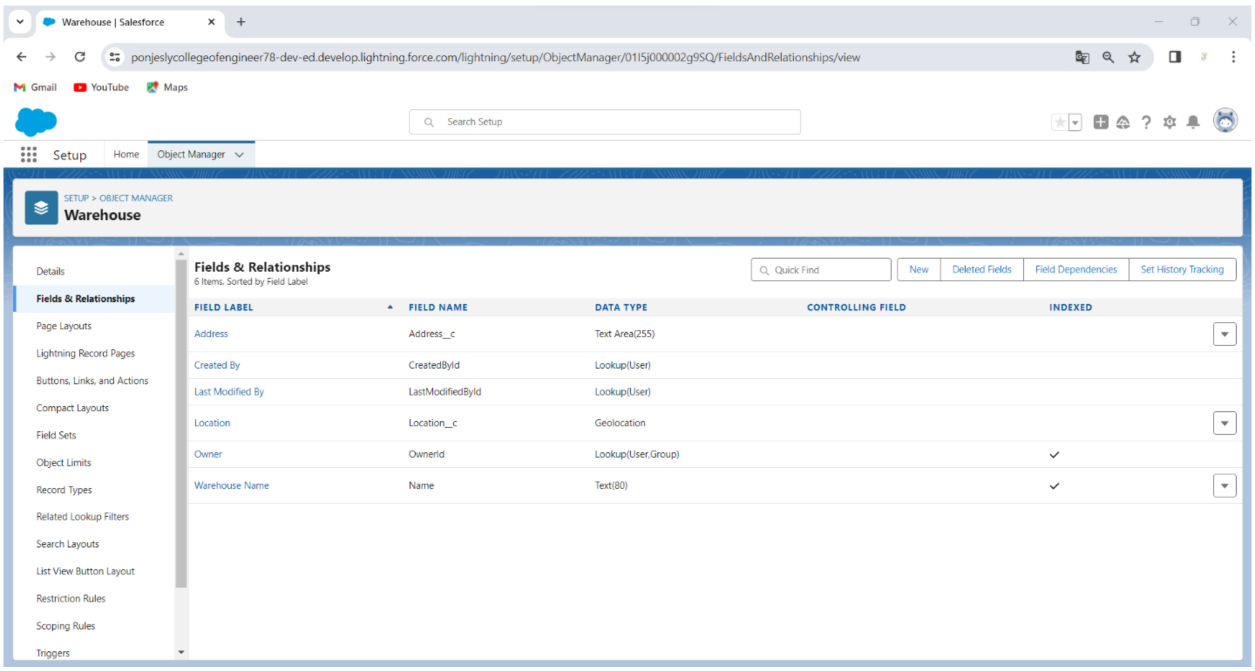
Milestone- 05 [Fields & Relationships]

Creation Of Fields For The Dispatch/Tracking Object

1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select **Dispatch/Tracking**
4. Select Fields & Relationships from the left navigation
5. Click New
6. Select the Text as the Data Type, click Next.
7. For Field Label, enter Tracking ID & length = 40.
8. Click Next, Next, then Save & New.



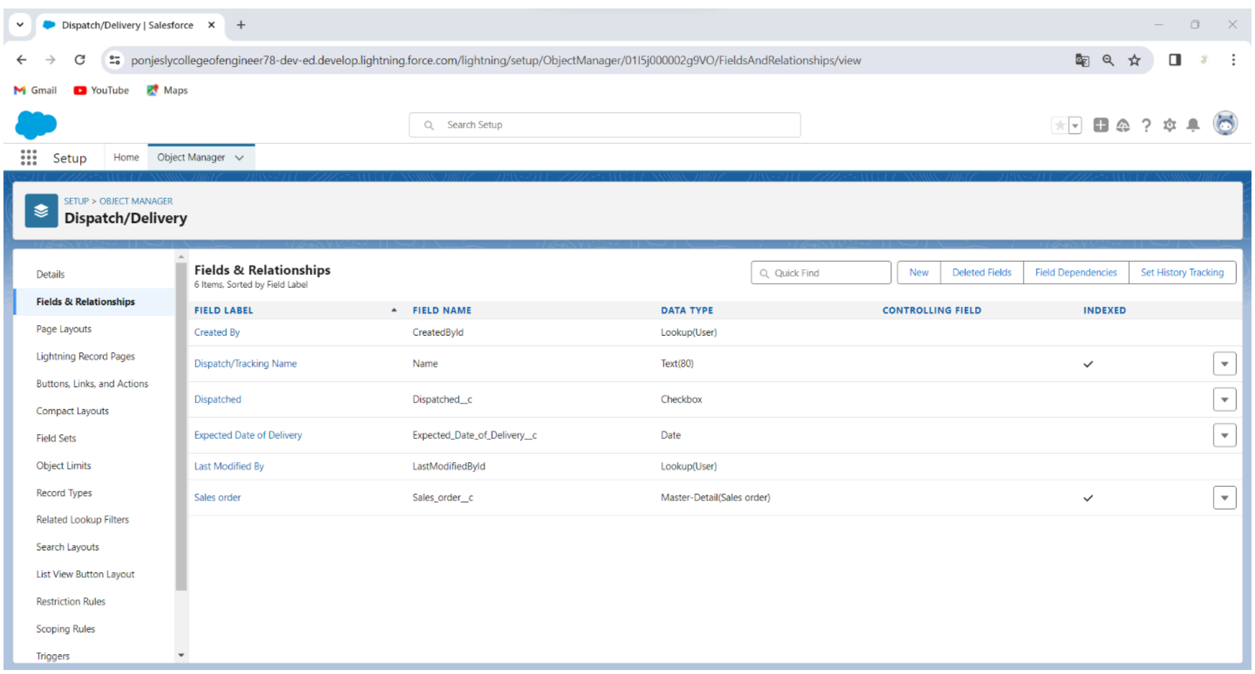
Creation of fields for **Warehouse** object- Address, Location select datatype according table.



Creation fields for **Dispatch/Delivery** object- Dispatched, Expected date of delivery select datatype according table.

Master-Detail Relationship On Dispatch/Delivery

1. Select Master-Detail Relationship as the Data Type and click Next.
2. For Related to, enter **Sales order.**
3. Click Next.
4. For Field Label, enter **Sales order**.
5. Click Next, Next, Next and Save.



Let’s Create A Pick-List Field On Sales Order

1. From Setup, click Object Manager and select Sales order.
2. Click Fields & Relationships, then New.
3. Select Picklist as the Data Type and click Next.
4. For Field Label enter **Status**
5. Select Enter values, with each value separated by a new line and enter these values:
6. Open
7. Hold
8. Shipped
9. Returned
10. Click Next, Next, then Save & New

Lookup Relationship

Let's create a **Lookup relationship** on **Sales Order** object with **Account** object Follow steps 1 to 5 of field creation then follow below steps.

1.Select look up Relationship as the Data Type and click Next.

2.For Related to, enter **Account.**

3. Click Next.
4. For Field Label, enter **Customer**.
5. Click Next, Next, Next and Save.

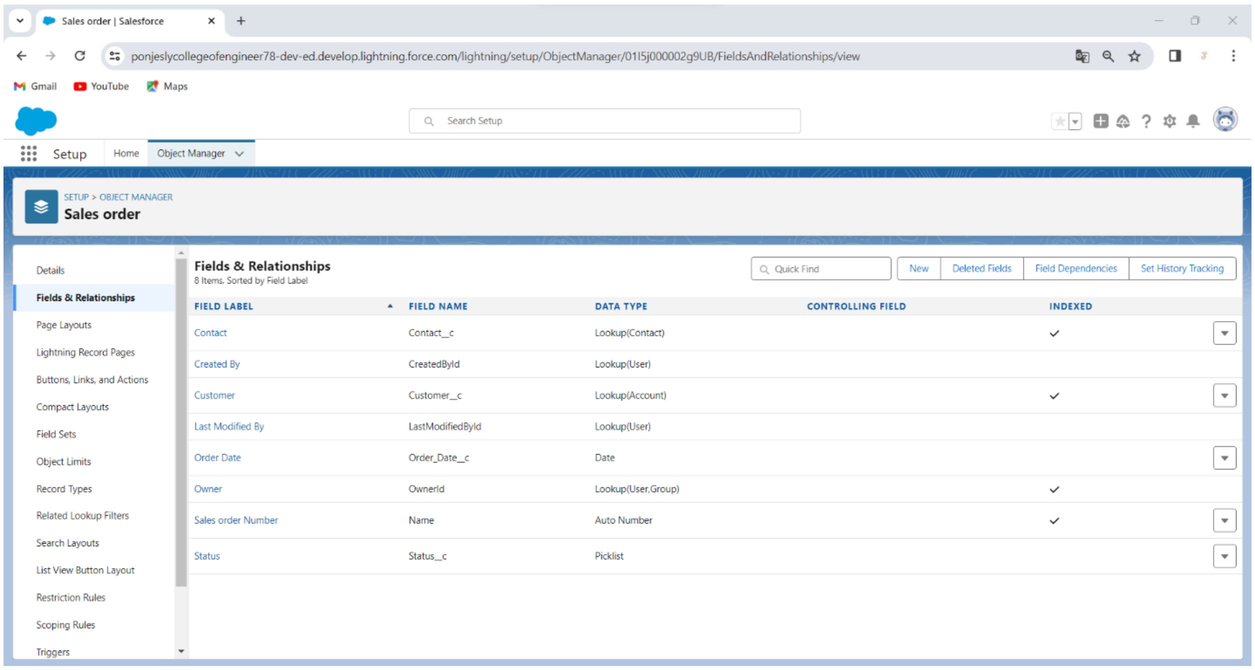
Lookup Relationship On Sales Order

Let's create a **Lookup relationship** on **Sales Order** object with **Contact** object with use of Lookup Filter.
Follow steps 1 to 5 of field creation from activity 1 then follow below steps.

1. Select look up Relationship as the Data Type and click Next.
2. For Related to, enter **Contact.**
3. Click Next.
4. For Field Label, enter **Contact**.
5. Click **lookup filter**.
6. Provide filter as given below & also refer picture (Screenshot of Step 6) Contact: Account ID equals Sales Order: Customer
7. Click Next, Next, Next and Save.

Create Order Date Field

Create **Order date** field on Sales Order

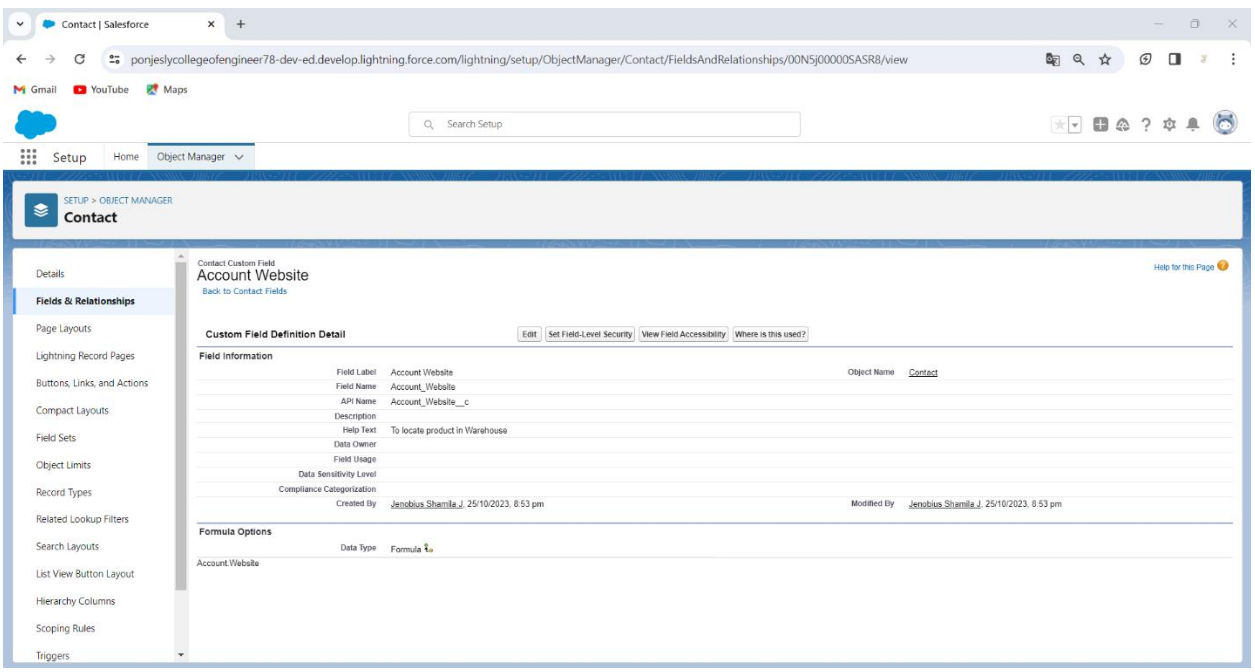


Cross-Object Formula Field

Creation of cross object formula field

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

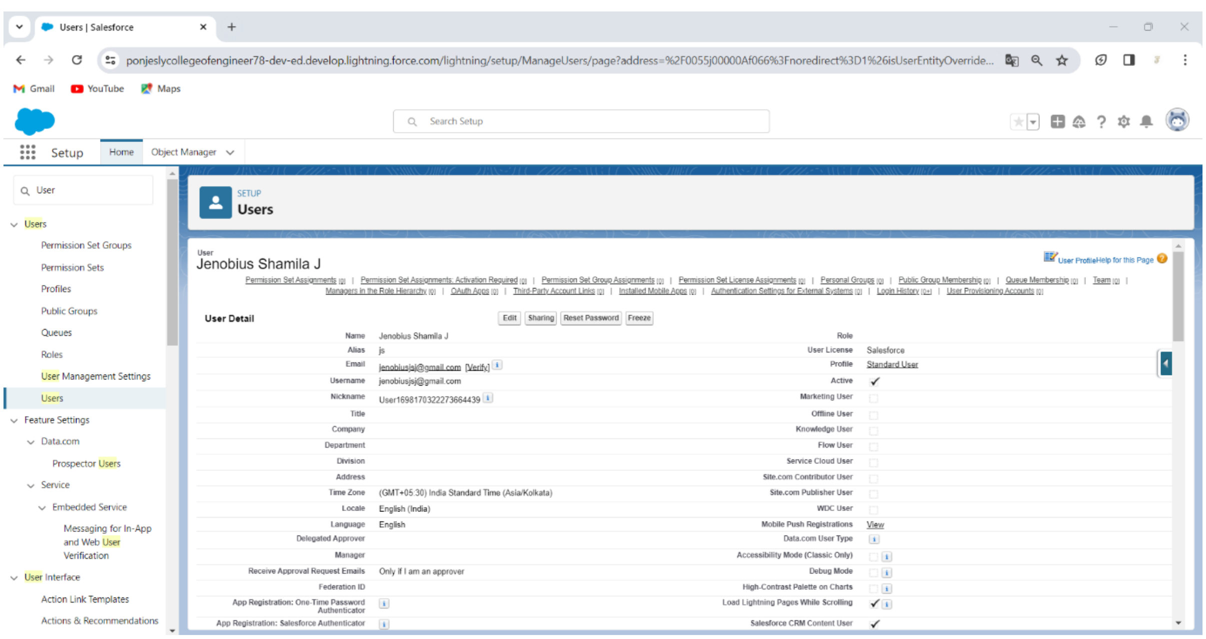
6. And give the label name has Account Website
7. Select formula return type **Text**
8. In the formula field enter this formula Account. Website.
9. Click next you will navigate to field level security click on visible checkbox so that it is visible to all profiles.
10. Select the next option, select the page layout and save it.



Milestone- 06[User]

Creating A User:

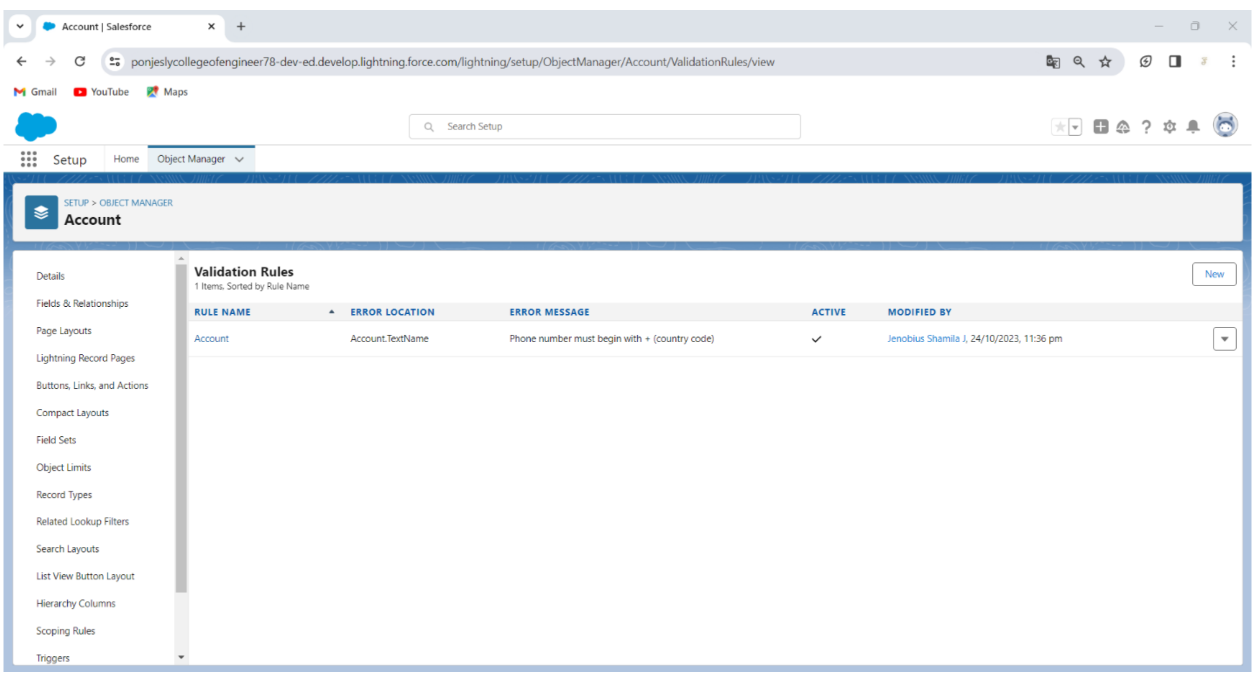
1. From Setup, in the Quick Find box, enter Users.
2. Select Users.
3. Click New User.
4. Enter the First Name and Last Name manager and (Your) email address and a unique username in the form of an email address. By default, the username is the same as the email address.
5. Select a User License as **salesforce**
6. Select **Standard platform** profile.
7. Check Generate new password and notify the user immediately to have the user’s login name and a temporary password emailed to your email.



Milestone- 07[Validation Rule]

Creation Of Validation Rule

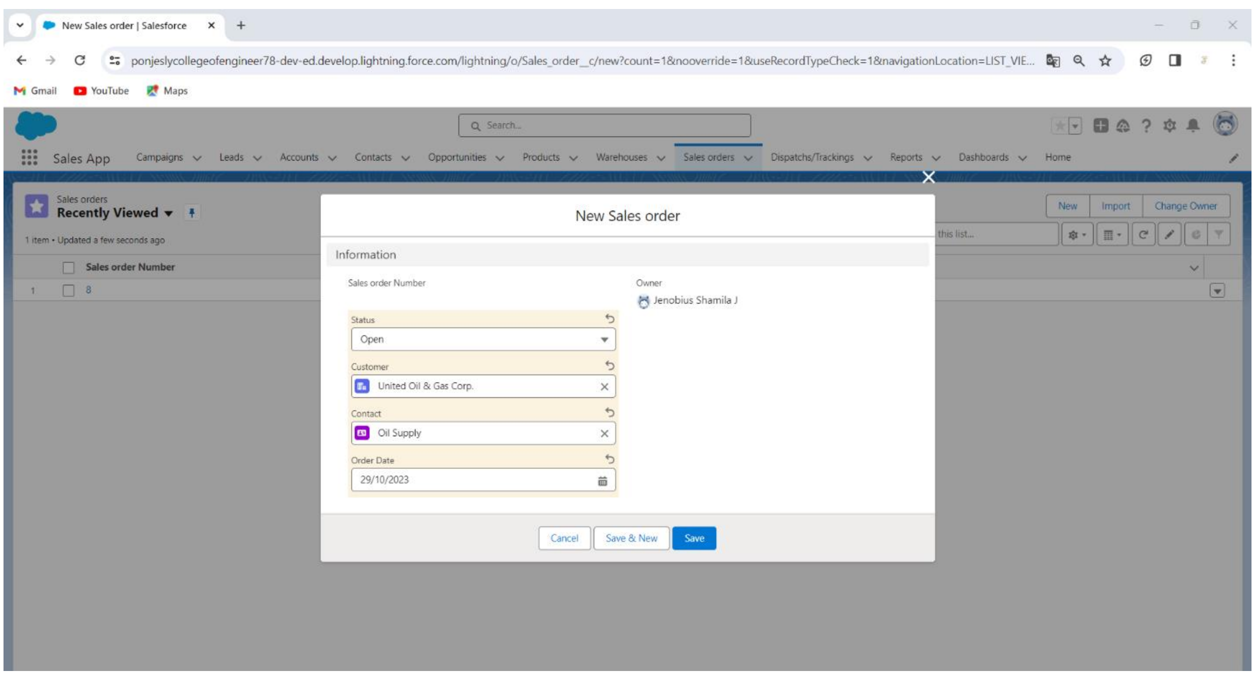
1. Navigate to object manager and select Account object.
2. In details section scroll down and find validation rule in it.
3. Click new, give the label name and in edit error conditional formula give the formula - LEFT(Phone, 1) < > "+".
4. And in error message give the description has Phone number must begin with + (country code).
5. In error location select field.



Milestone- 08[User Adoption]

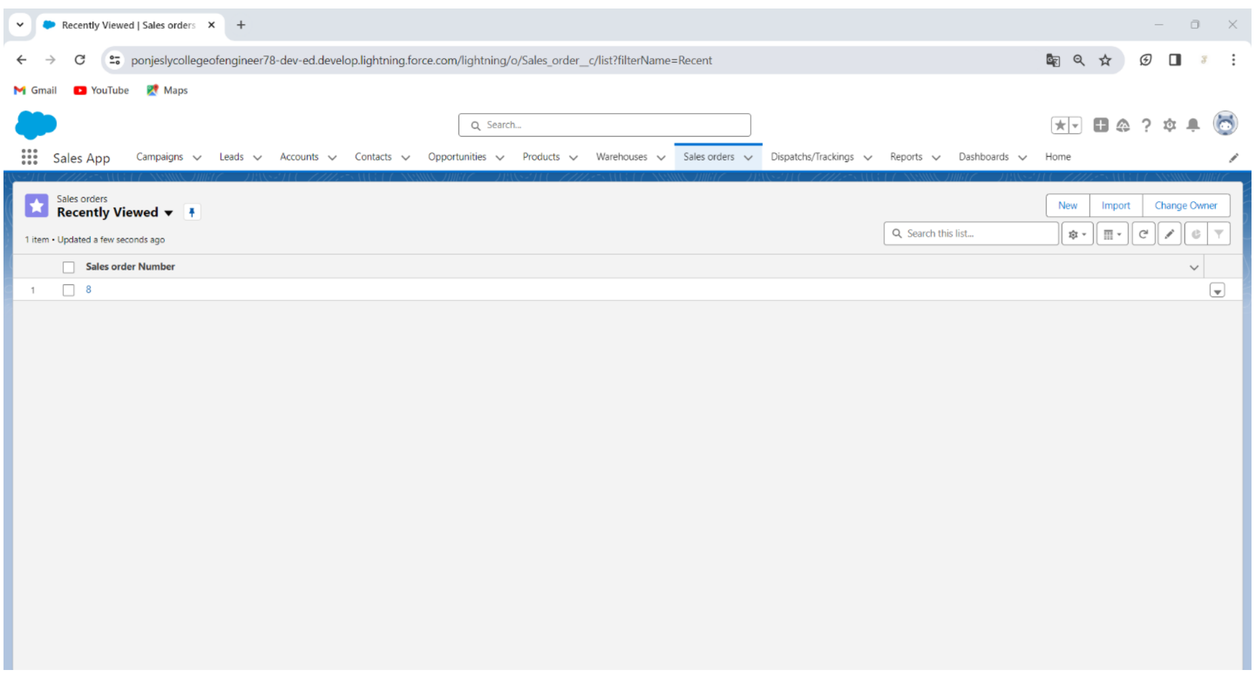
Create Record (Sales Order)

1. Click on App Launcher on left side of screen.
2. Search **Sales App** & click on.
3. Click on **Sales Order** tab.
4. Click new button
5. Fill all **Sales Order** record details.
6. Click on Save Button.



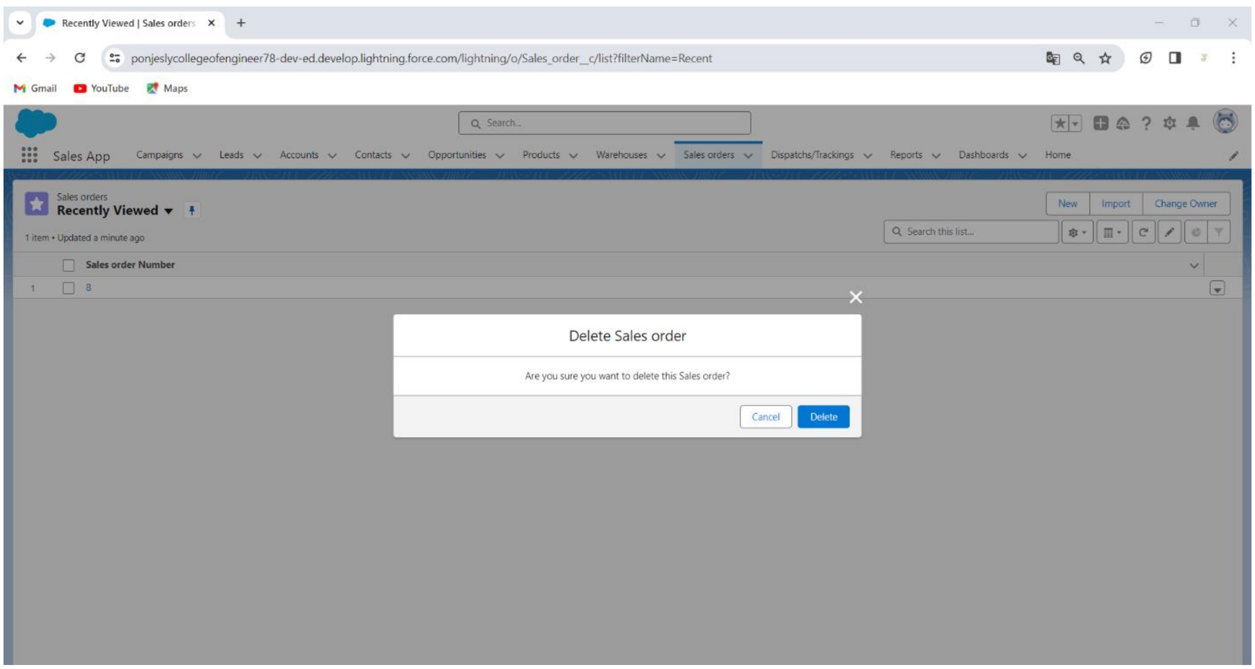
View Record (Sales Order)

1. Click on App Launcher on left side of screen.
2. Search **Sales App** & click on it.
3. Click on **Sales Order** Tab.
4. Click on any record name. you can see the details of the Sales Order



Delete Record (Sales Order)

1. Click on App Launcher on left side of screen.
2. Search **Sales App** & click on it.
3. Click **on Sales Order** Tab.
4. Click on Arrow at right hand side on that Particular record.
5. Click delete and delete again.



Milestone- 09[Reports]

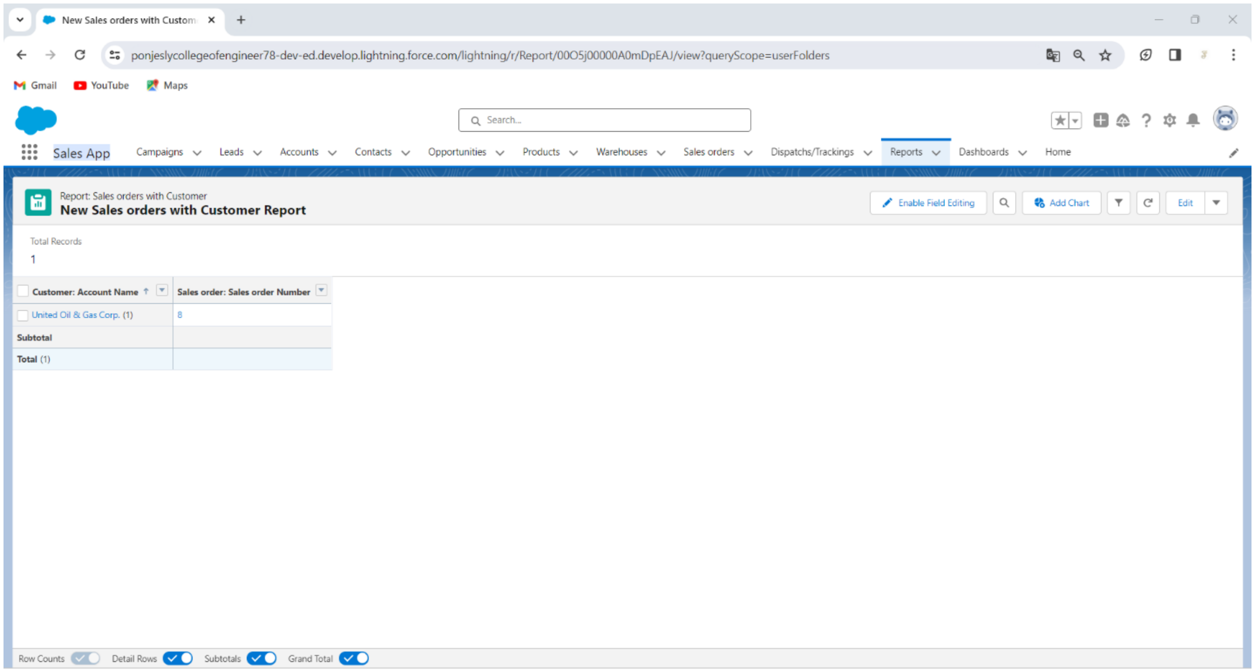
Create Report

1. Click App Launcher and
2. Select **Sales App**
3. Click reports tab
4. Click New Report.
5. Click the report type as Sales order with customer Click **Start report.**
6. Customize your report, in group rows select - Customer Account Name
7. Click refresh
8. Click save and run
9. Give report name – **New Sales orders with Customer Report**
10. Click Save

View Report

1. Click on App Launcher on left side of screen.
2. Search "**Sales App**" & click on it.
3. Click on Reports Tab.

4. Click on **New Sales orders with Customer Report** and see records.



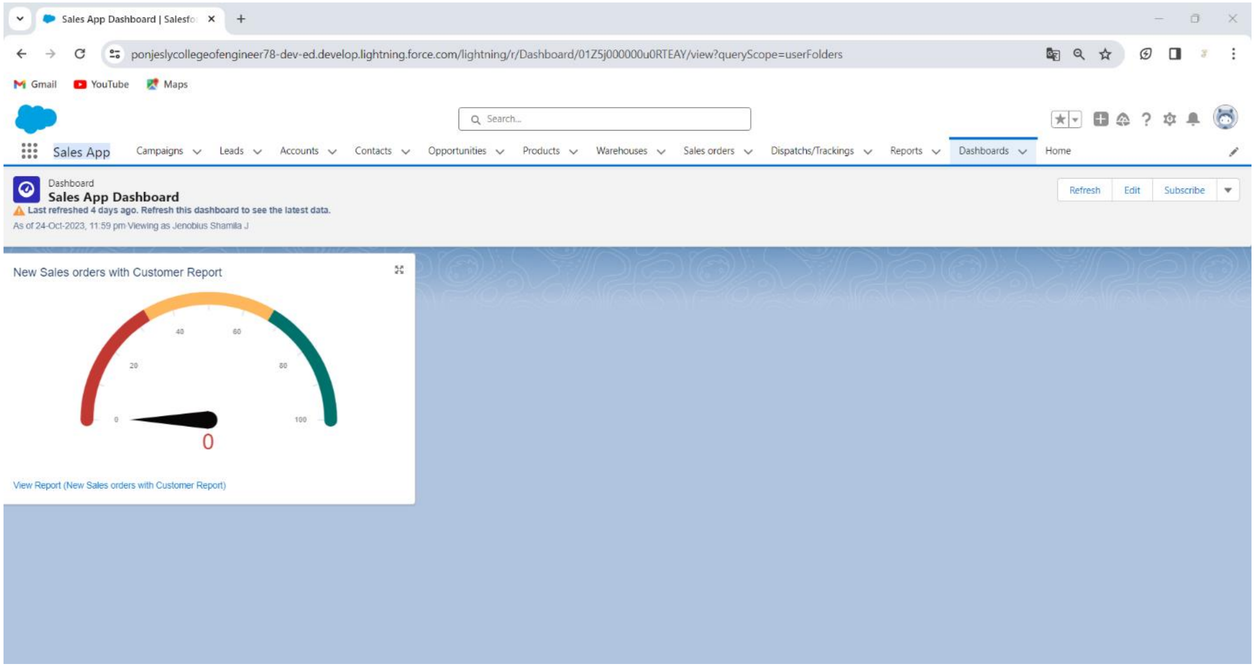
Milestone- 10[Dashboards]

Create Dashboard

1. Click on Dashboards tab from the “Sales App” application,
2. Click on new dashboard
3. Give name- Sales App Dashboard
4. Click create
5. Give your dashboard a name and click on +component,
6. Select the New Sales orders with Customer Report which you created.
7. For the data visualization select any of the chart, table etc as your wish.
8. Click add
9. Click save

View Dashboard

1. Click on App Launcher on left side of screen.
2. Search Sales App & click on it.
3. Click on Dashboard Tab.
4. Click on Sales App Dashboard and see graph view of records


Sales App Dashboard | Salesfo
ponjeslycollegeofengineer78-dev-ed.develop.lightning.force.com/lightning/r/Dashboard/01Z5j000000u0RTEAY/view?queryScope=userFolders
Gmail
YouTube
Maps
Search...
Sales App
Campaigns
Leads
Accounts
Contacts
Opportunities
Products
Warehouses
Sales orders
Dispatchs/Trackings
Reports
Dashboards
Home
Dashboard
Sales App Dashboard
Last refreshed 4 days ago. Refresh this dashboard to see the latest data.
As of 24-Oct-2023, 11:59 pm·Viewing as Jenobius Shamila J
Refresh
Edit
Subscribe
New Sales orders with Customer Report
0
20
40
60
80
100
0
View Report (New Sales orders with Customer Report)

Milestone- 11[Flow]

Create A Flow

1. Click on setup gear
2. In quick find search for Flows
3. Choose new flow option at right side of the page
4. Now select screen flow as a new flow

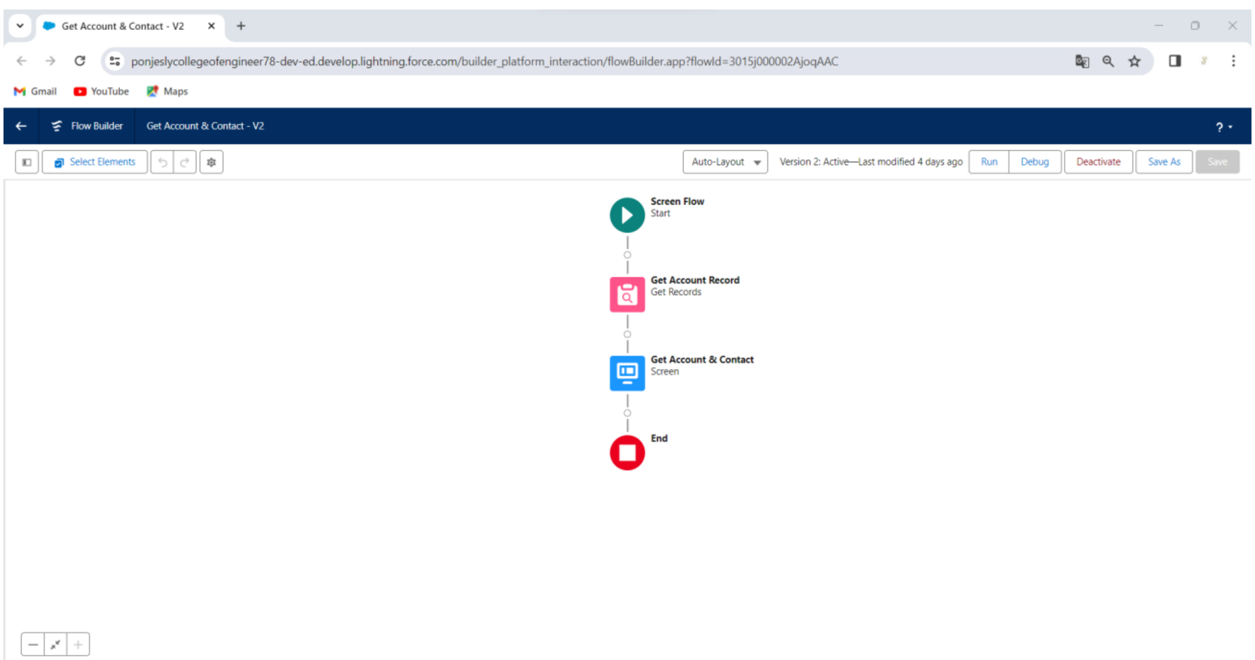
1. Left side corner of the page you can find a toggle click on that and select a new resource.
2. and select resource type has variable
3. Give api name as Recordid
4. and select data type as Text
5. At bottom for Availability outside the flow check the box as Available for Input
6. Click on done
7. Now below the start button click on add element and choose Get Records
8. Now give the label name as Get Account Record
9. For Get record of object choose object as – Account
10. For Filter account records condition requirements are - All conditions are met Field-

Account id Operator- equals Value- Recordid (variable which we had created)

11. For how many records to share - Only the first record
12. How to store record data- Automatically stores all fields.
13. Click on done.
14. Now again add the element below the Get account record and select Screen as your element
15. Give the label name as Get Account & Contact
16. Left side in the component section search for Name and drag it to the screen
17. Give the api name as Name
18. Now drag Email from component section and move it to the screen
19. Give the Api name- Email
    Required - {!$GlobalConstant.True}
20. Now drag the Phone from component to screen below the email
21. Give the Api name as - Phone
    Required- {!$GlobalConstant.True}
22. Now Drag Address from component section to screen
23. Give the Api name as - Address
    City Value- {!Get_Account_Record.ShippingCity}

Country Value-
{!Get_Account_Record.BillingCountry}
Postal code-
{!Get_Account_Record.ShippingPostalCode}
State/province value-
{!Get_Account_Record.ShippingState}
Street Value-
{!Get_Account_Record.ShippingStreet}

24. Click on done and save it. Give the label name as Get Account & Contact.



Milestone- 12[Apex Trigger]

Create An Apex Trigger

1. Click on setup gear
2. Below the setup gear you can find developer console click on that.
3. Click on file and select new and select **Apex trigger**.

   Copy this code

   ```
   trigger PreventDuplicateAccounts on Account (before insert) {
    Set<String> accountNames = new Set<String>();
   for (Account acc : Trigger.new) {
   if (accountNames.contains(acc.Name)) {
   acc.addError('A duplicate account with this name already exists.');
   } else {
   accountNames.add(acc.Name);
   }
   }
   }
   ```

4. Save it.

Demo Video Link:

https://drive.google.com/file/d/1DCPJOHkqBYBlggVGZ5hhpvwVrJrIqRbL/view?usp=sharing

Trailhead Url:

Team Leader: Jenobius Shamila J

https://www.salesforce.com/trailblazer/jenobiusshamilaj

Team Member 1: Priyadarsini P K

https://www.salesforce.com/trailblazer/priyadarsinipk

Team Member 2: Varsha M

https://www.salesforce.com/trailblazer/varsham9046

Team Member 3: Neha V

https://www.salesforce.com/trailblazer/nehav5984

Team Member 4: Jebisha M

https://www.salesforce.com/trailblazer/jebisham