RETAIL MANAGEMENT APPLICATION USING SALESFORCE

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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.

<u>Milestone-1 :</u>

Introduction

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:

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Activity-1

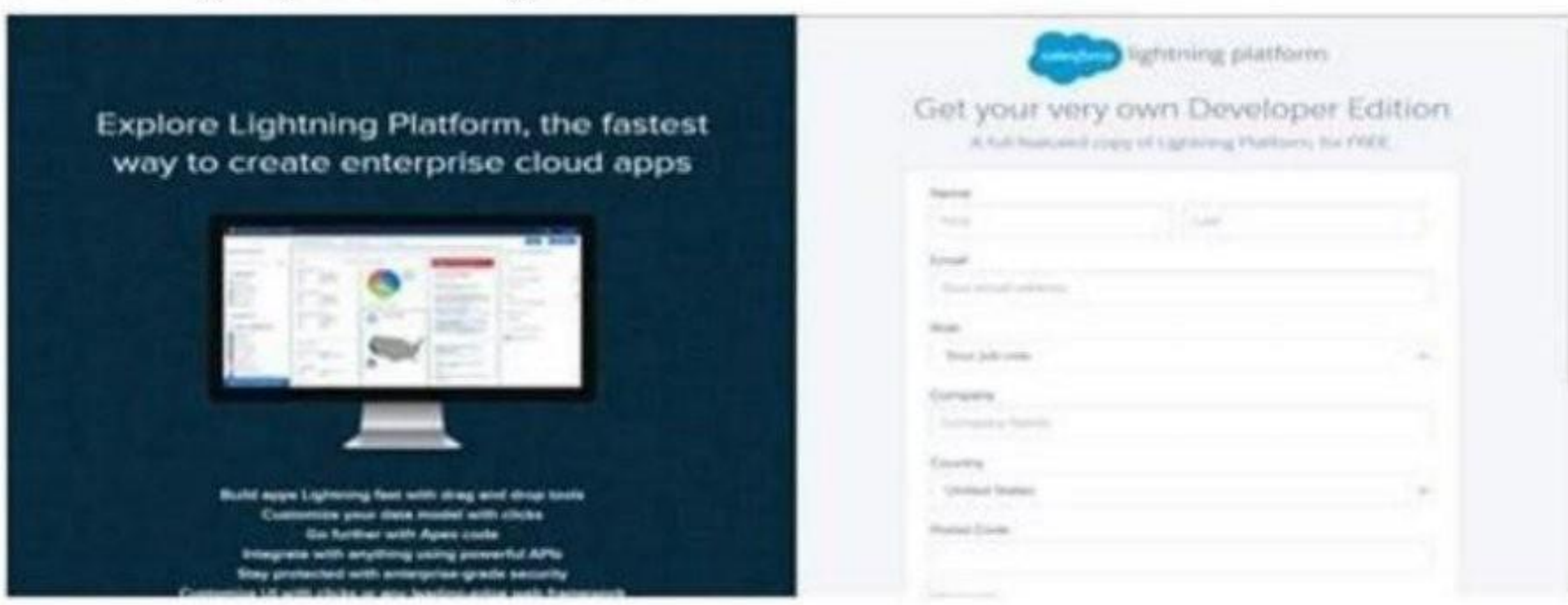
Creating Developer Account

Creating a developer org in salesforce.

1. Go to 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 : College Name
    5. County : India
    6. Postal Code : pin code
    7. Username : should be a combination of your name and company
       This need not be an actual email id, you can give anything in the format :

    username@organization.com

Click on sign up after filling these.



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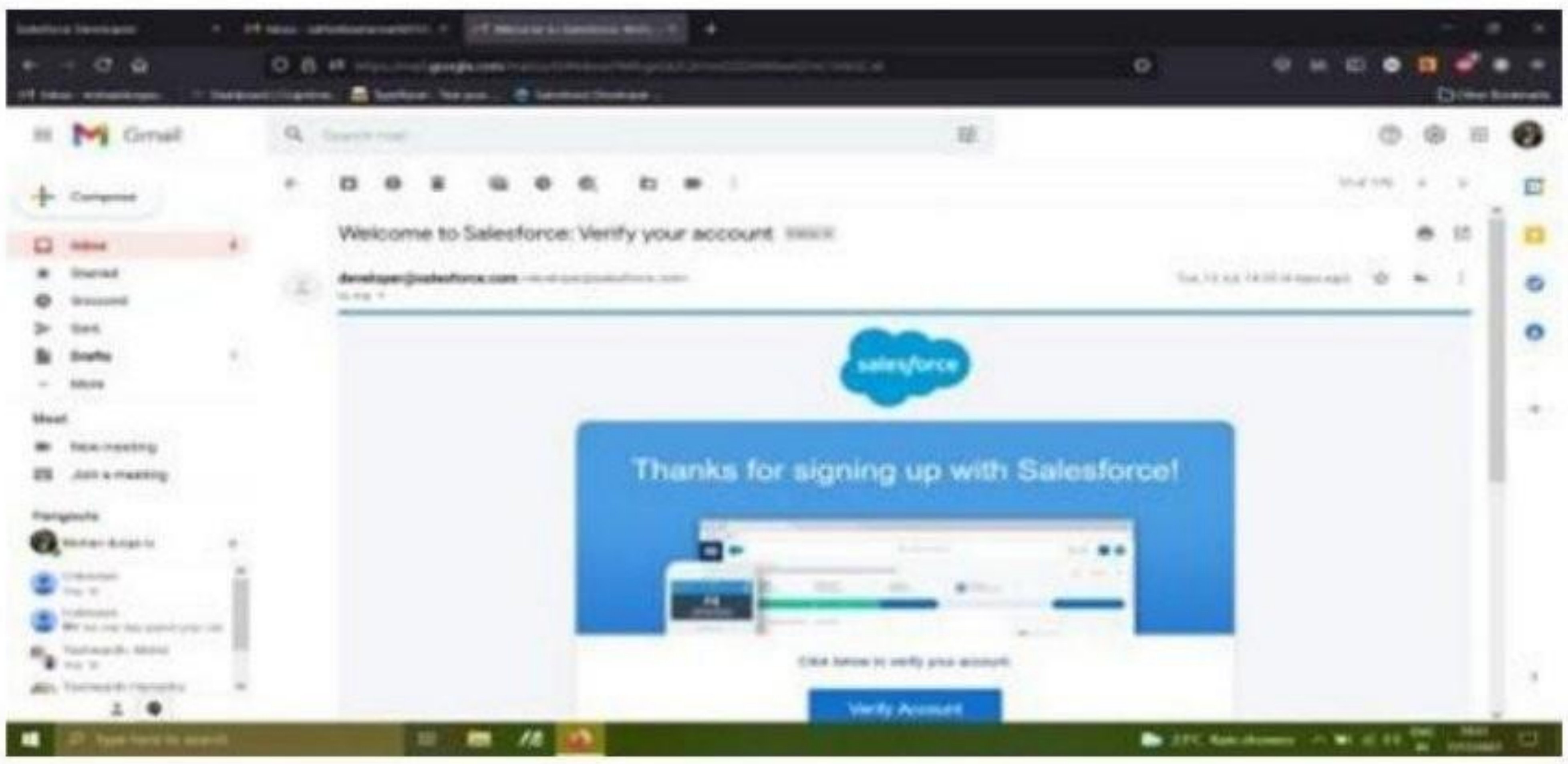
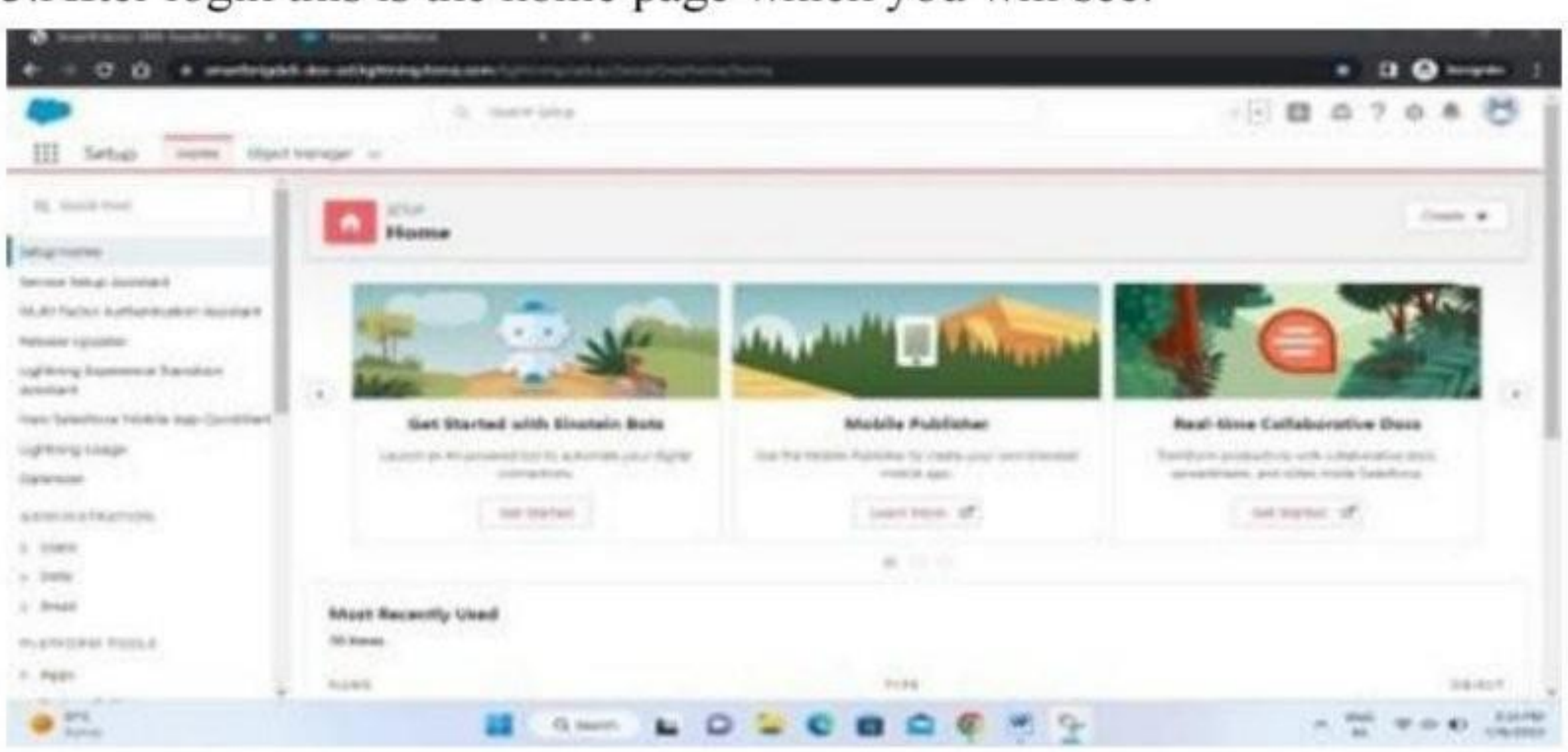
Account Activation

Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins, as



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.



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Milestone-2 Objects:

Objects are database tables that permit you to store data that is specific to an organization.Salesforce objects are of two types: 1) Standard objects,2) Custom objects

Objects involved in retail management are

Application	Object	Description
Sales app	Campaign	We do promotions by using this object
	Leads	We capture leads here
	Accounts	We capture customers data
	contacts	Employees data of customer
	opportunities	SMB sales orders data
	products	Here we store product details i.e electronic types
	Warehouse	We capture stocks data
	Sales order	This is an actual order which has invoice details
	Dispatch/Tracking	Orders dispatch related info will be stored here

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

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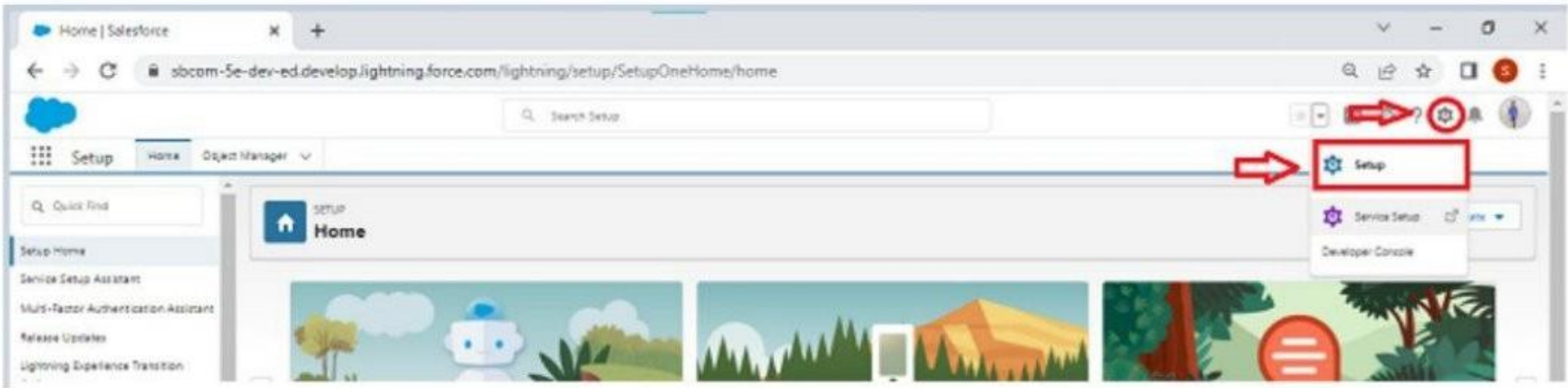
Activity-1

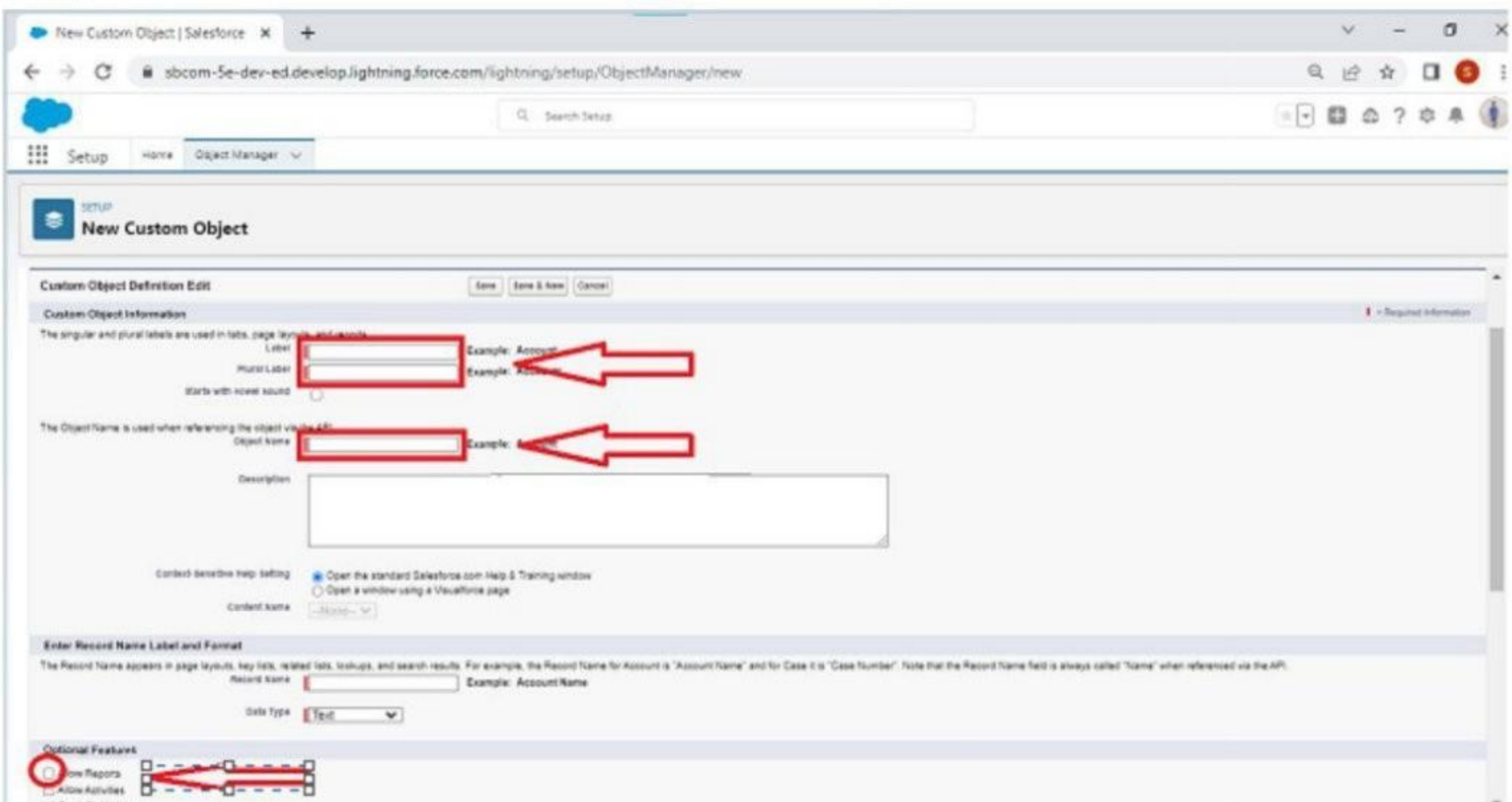
Creation of object Dispatch/Tracking

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.



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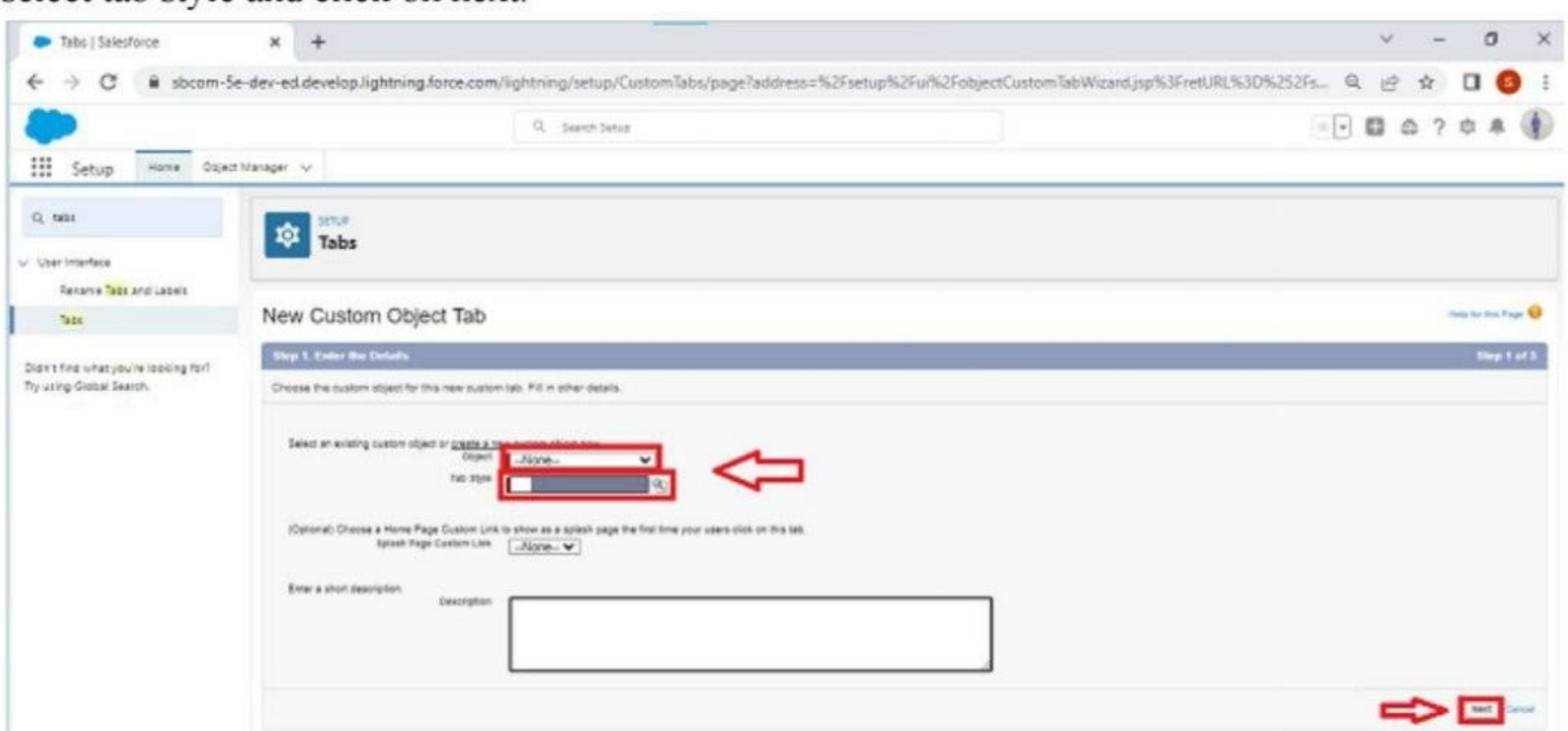
4) The label name has Display/tracking and Plural label has Display/trackings.
5) In enter record name label and format enter name record name has Tracking ID.
6) And the data type has text.
7) In deployment status select deployed option.

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.

Activity-2 Fields available on Dispatch/tracking

1) Dispatched

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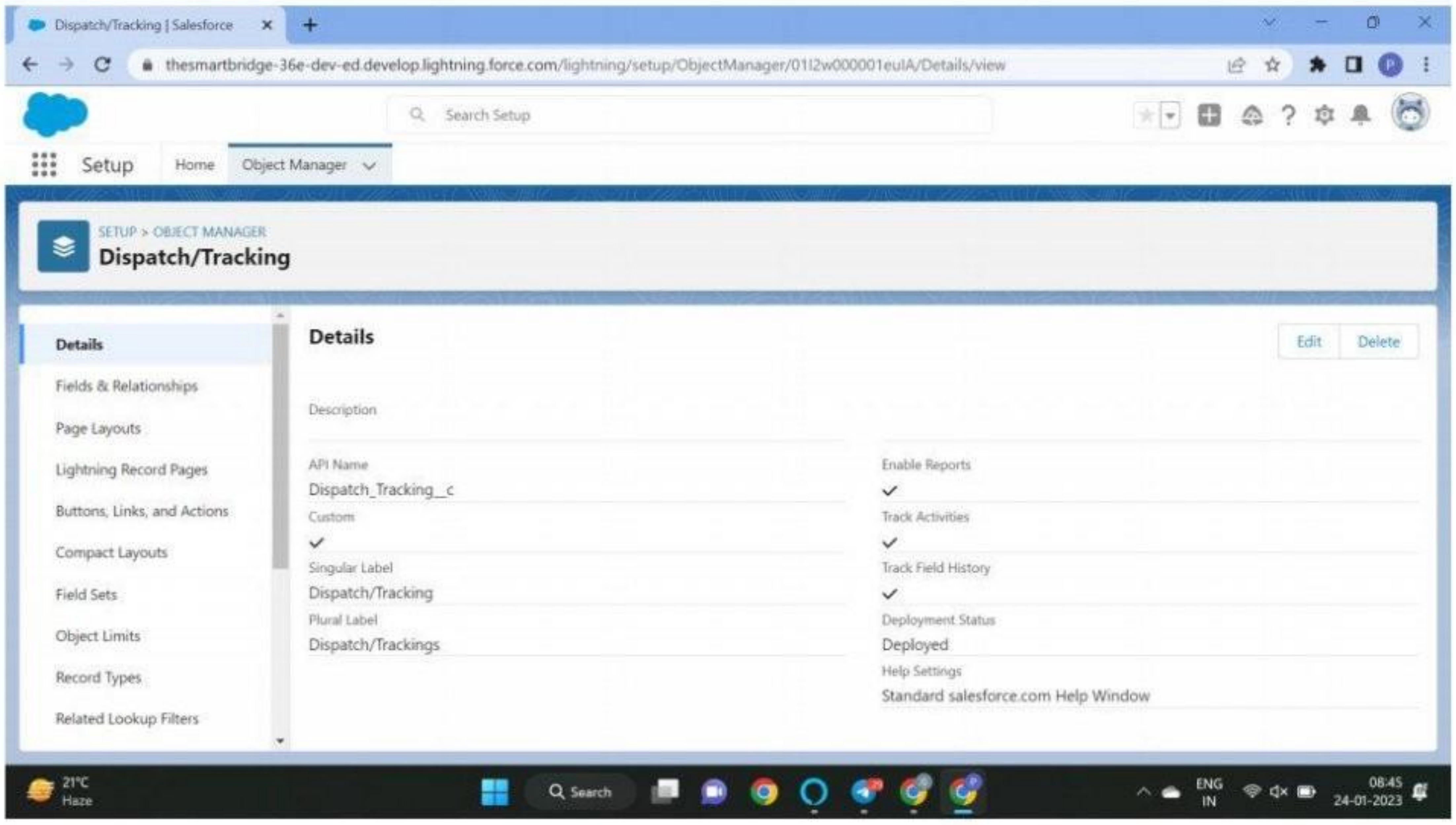
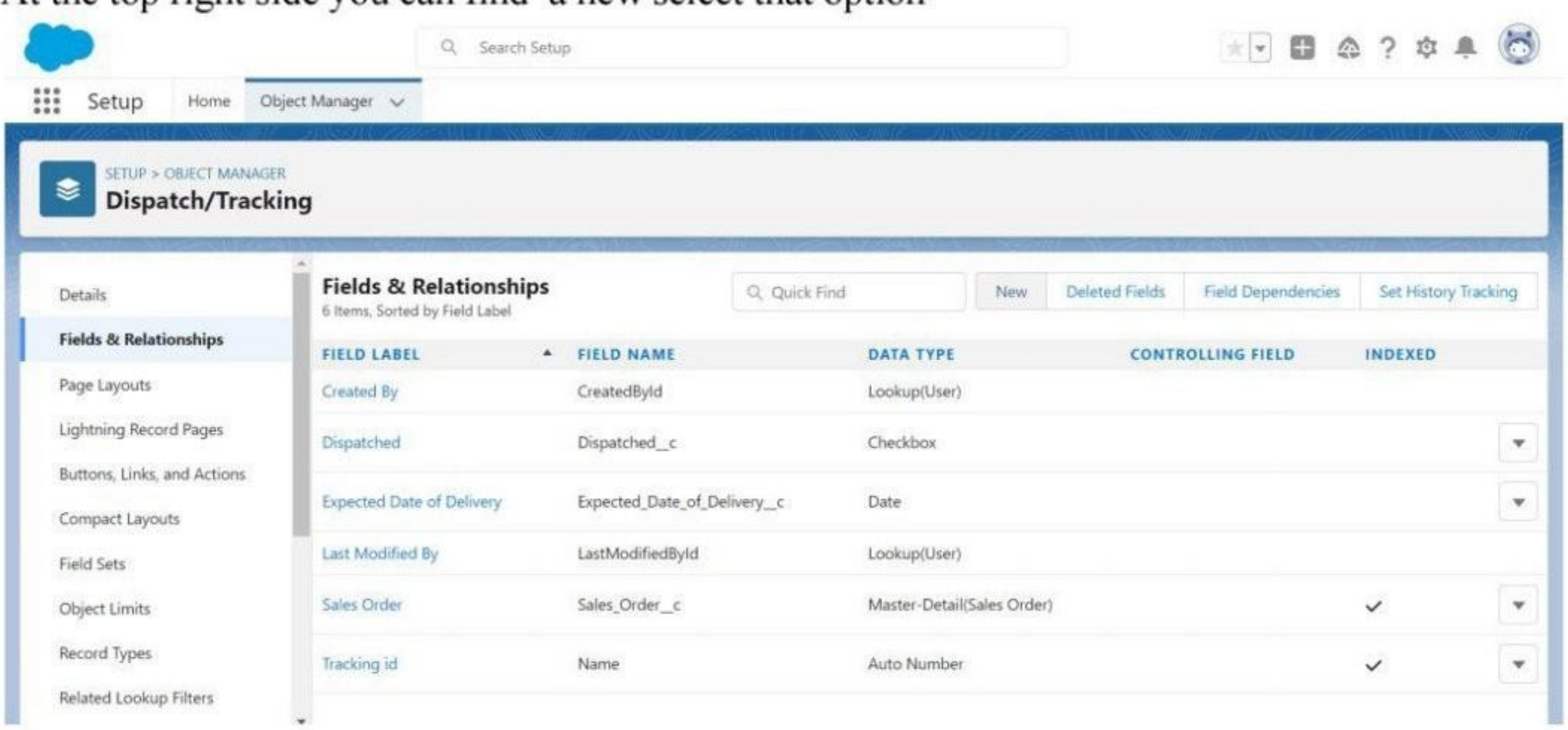
2) Expected date of delivery
3) Tracking Id
4) Sales order

Creation of fields 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



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

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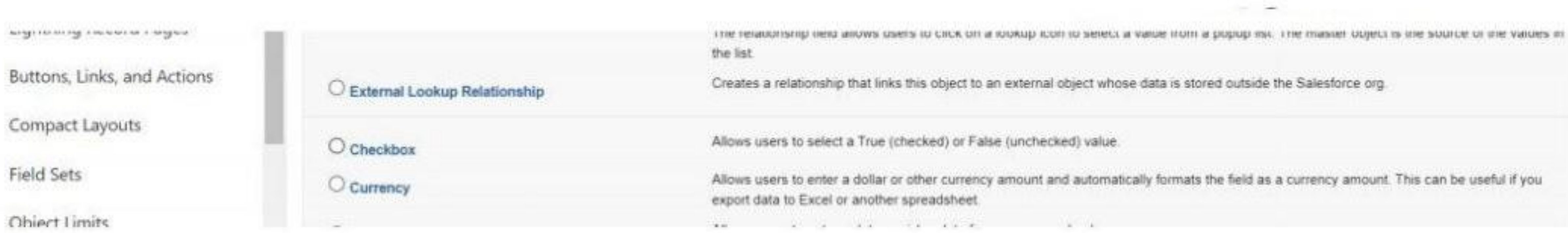
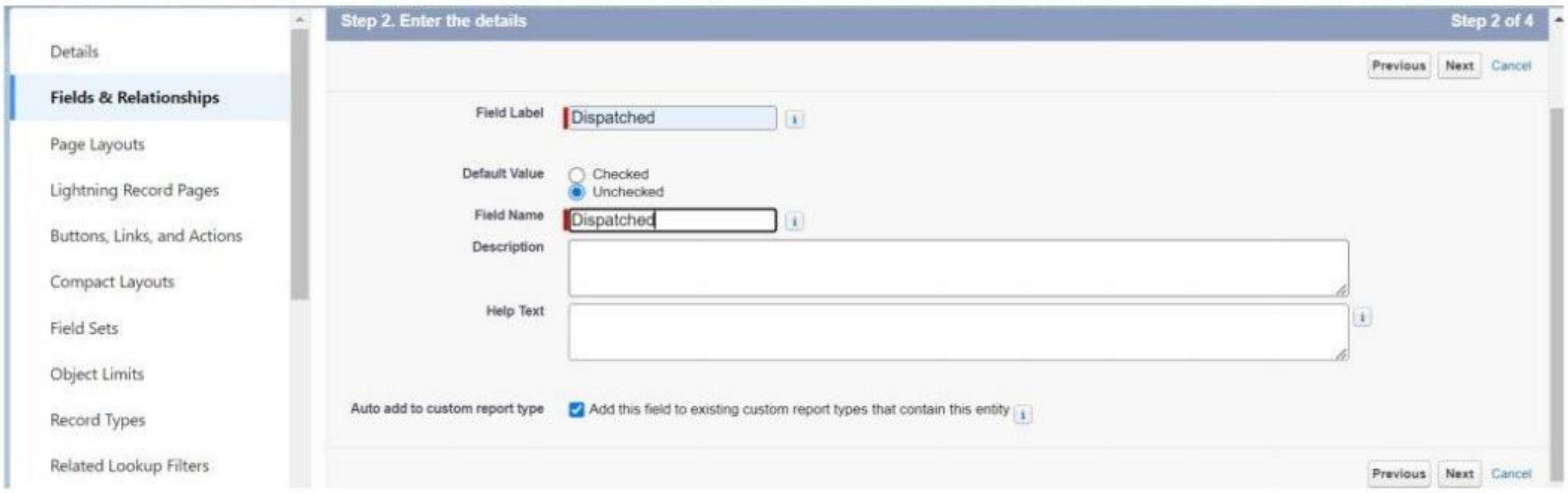


5) And you will navigate to enter the details page where you give the field label.



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 it.

<u>Milestone-3 Relationship b/w objects:</u>

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.

Activity-1:

Creation of relationships between objects

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

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

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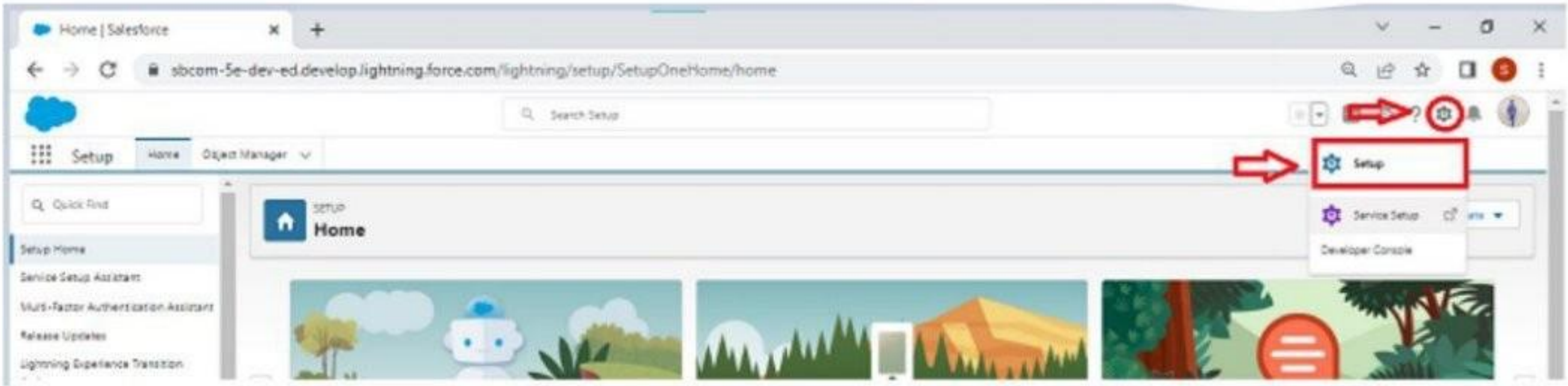
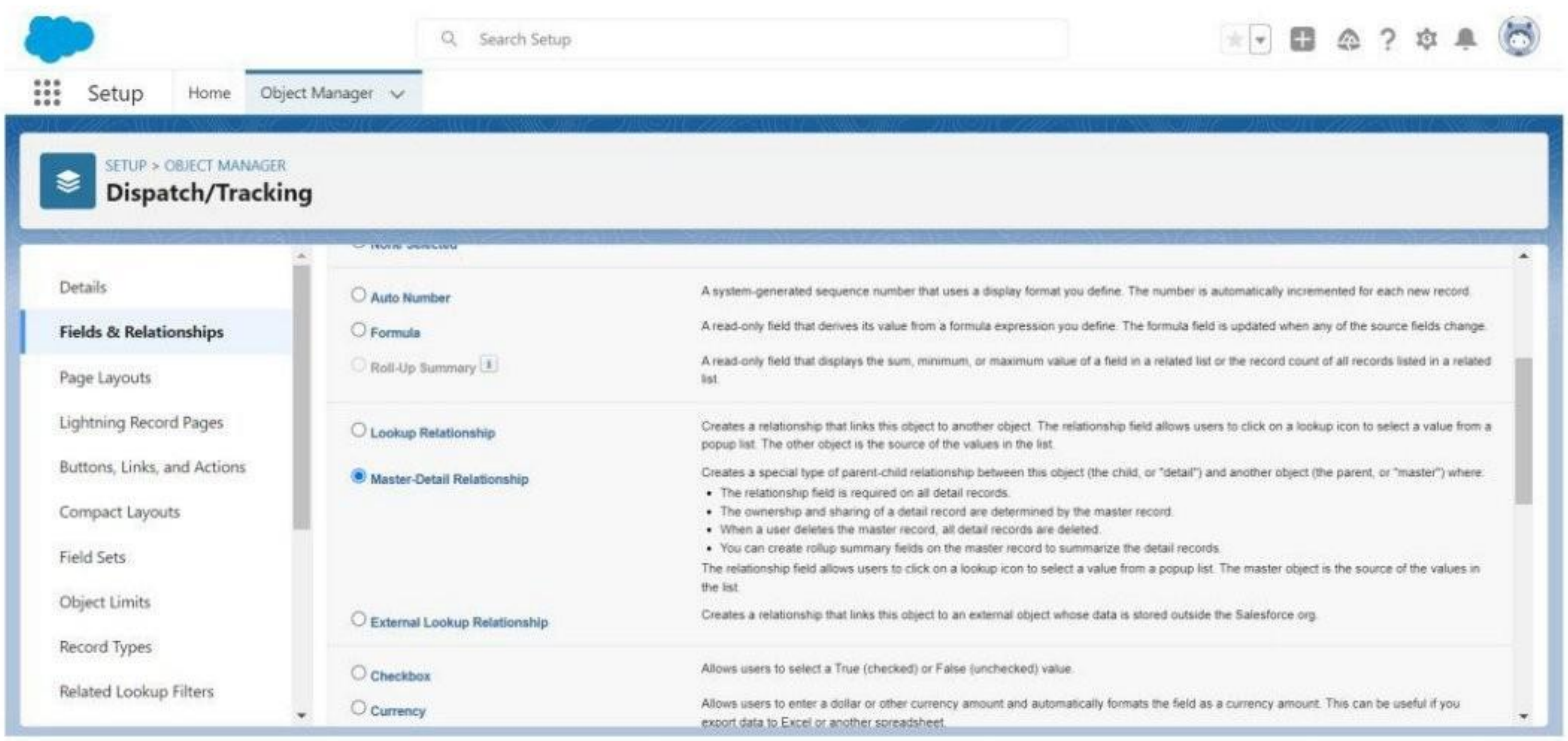


2) Go to the object manager and select 'Dispatch/tracking' object from the list
3) And select fields and relationships and click on new.
4) Select the data type has Master detail relationship



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.

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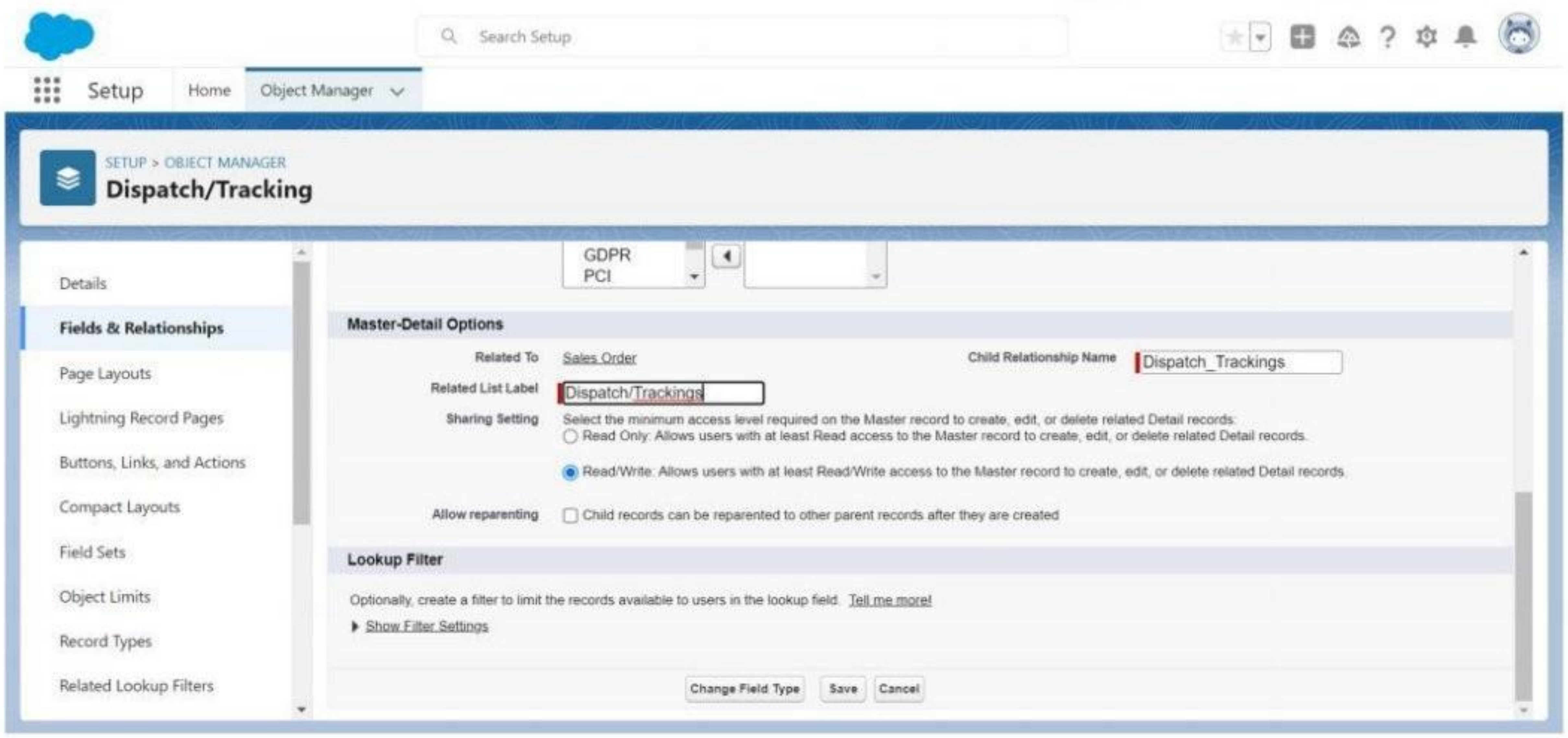

7) Select visible for all profiles in field level security and select page layout in next page and save it.

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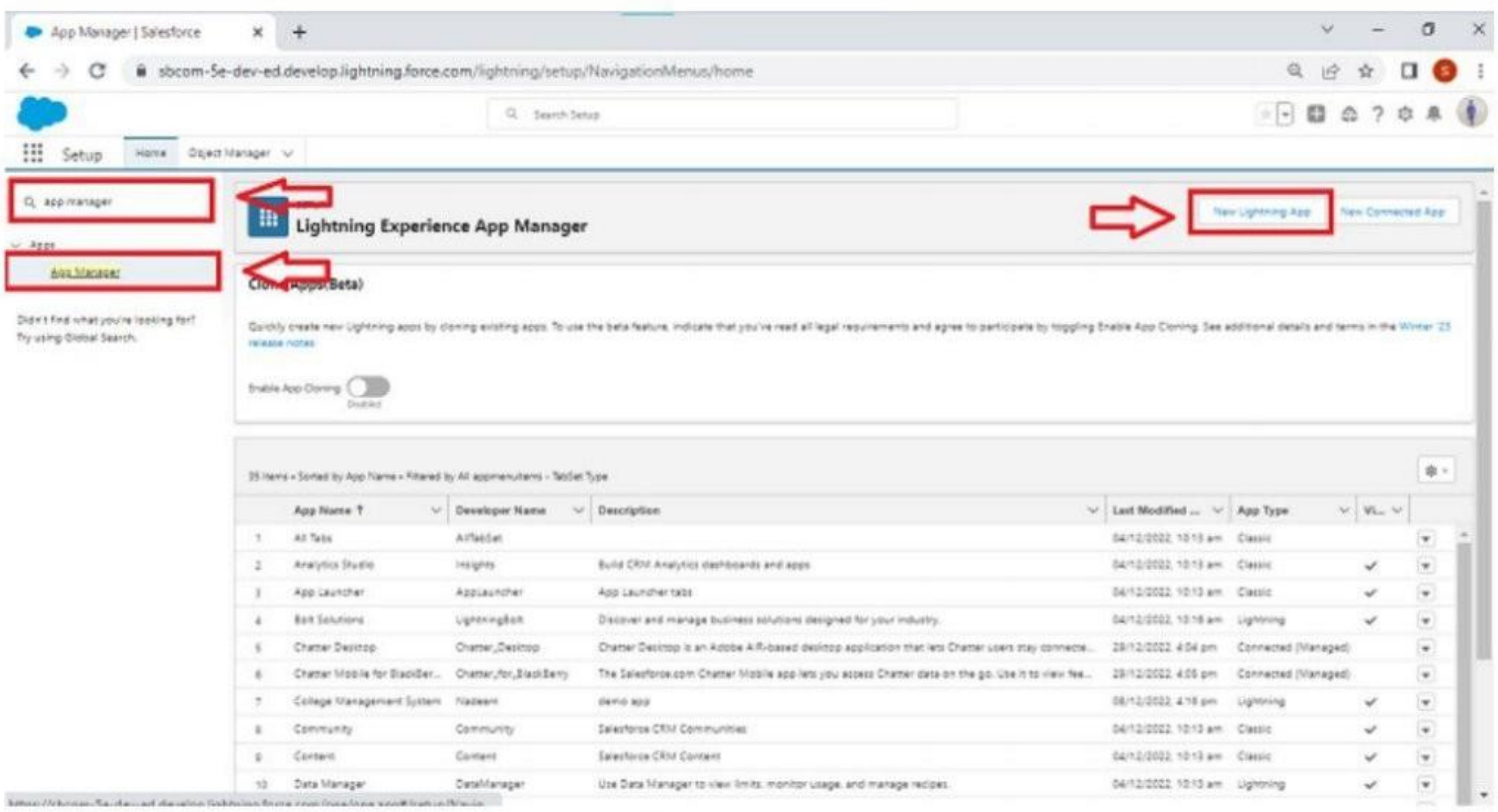
Milestone-4 Application:

Apps in Salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo, and a particular An app is a collection of items that work together to serve a particular function. Salesforce apps come in two flavors: Classic and Lightning.

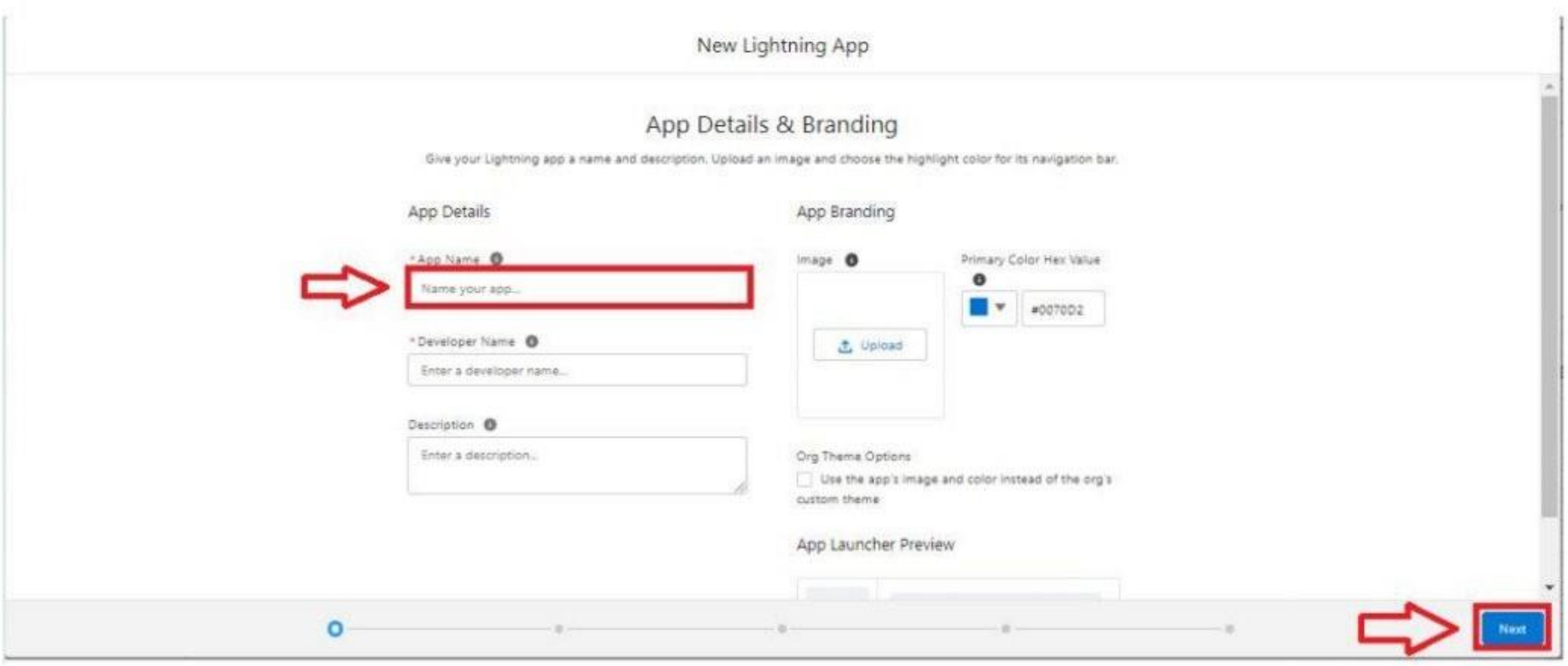
Activity-1

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.

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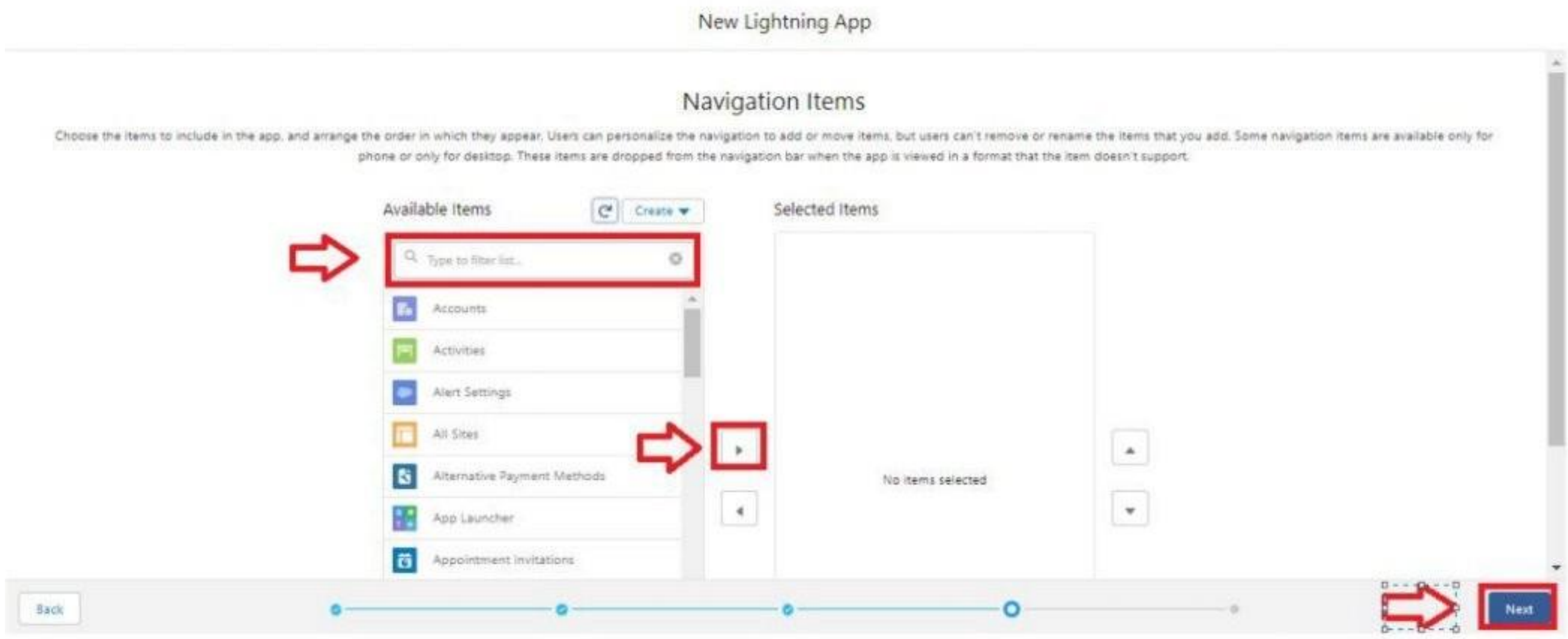
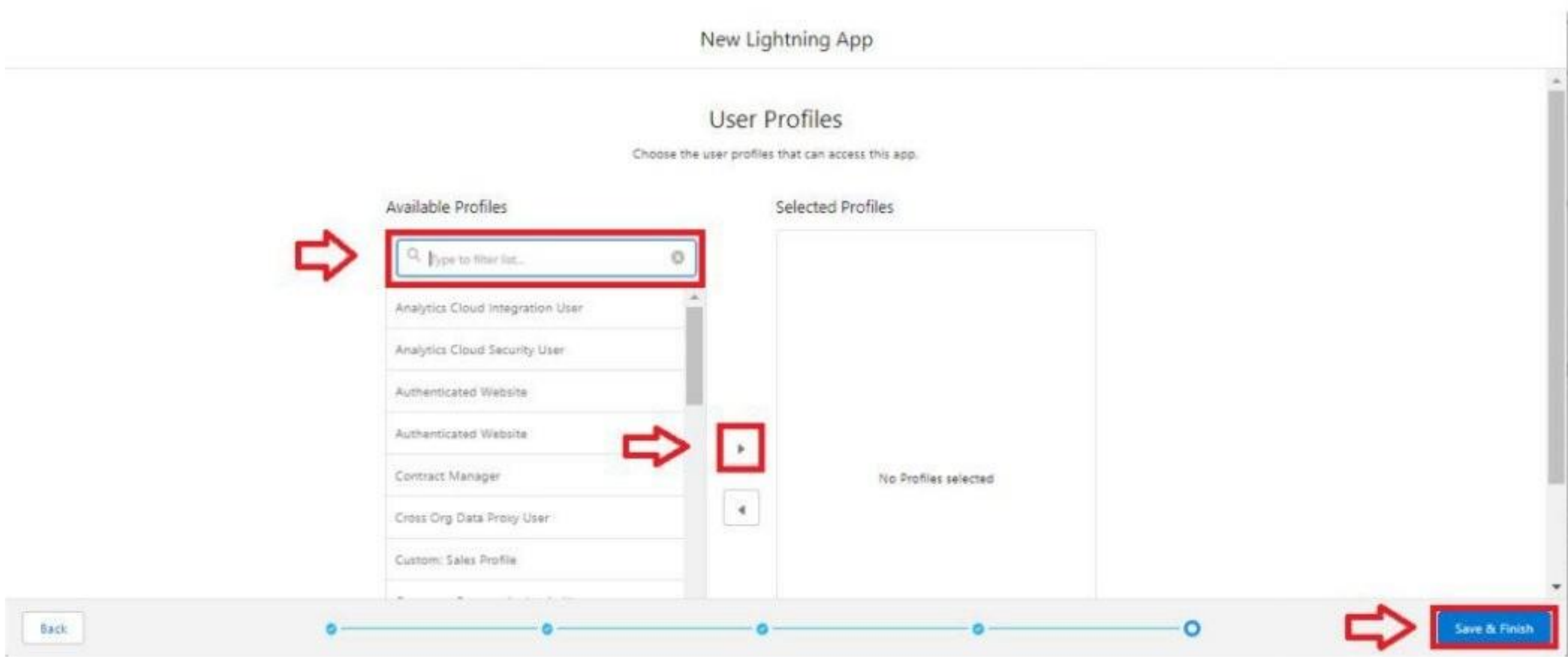
4) Upload the picture and click next.
5) Choose the app option as navigation style- standard navigation, support from factors-desktop & mobile and select next.



6) And move the objects from available items to selected items.
7) Accounts,contacts,opportunities,Leads,warehouse,dispatch/tracking,campaign to selected items.
8) And system admin profile to available items to selected items.



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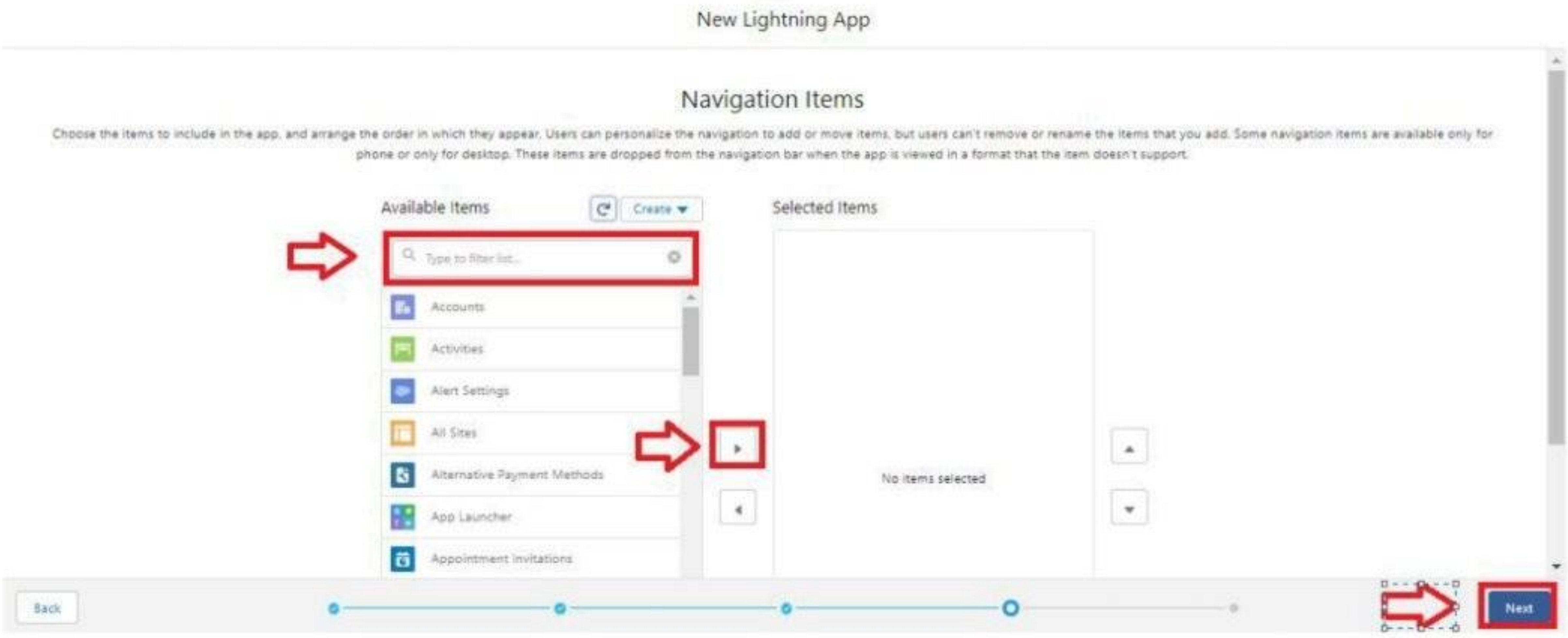

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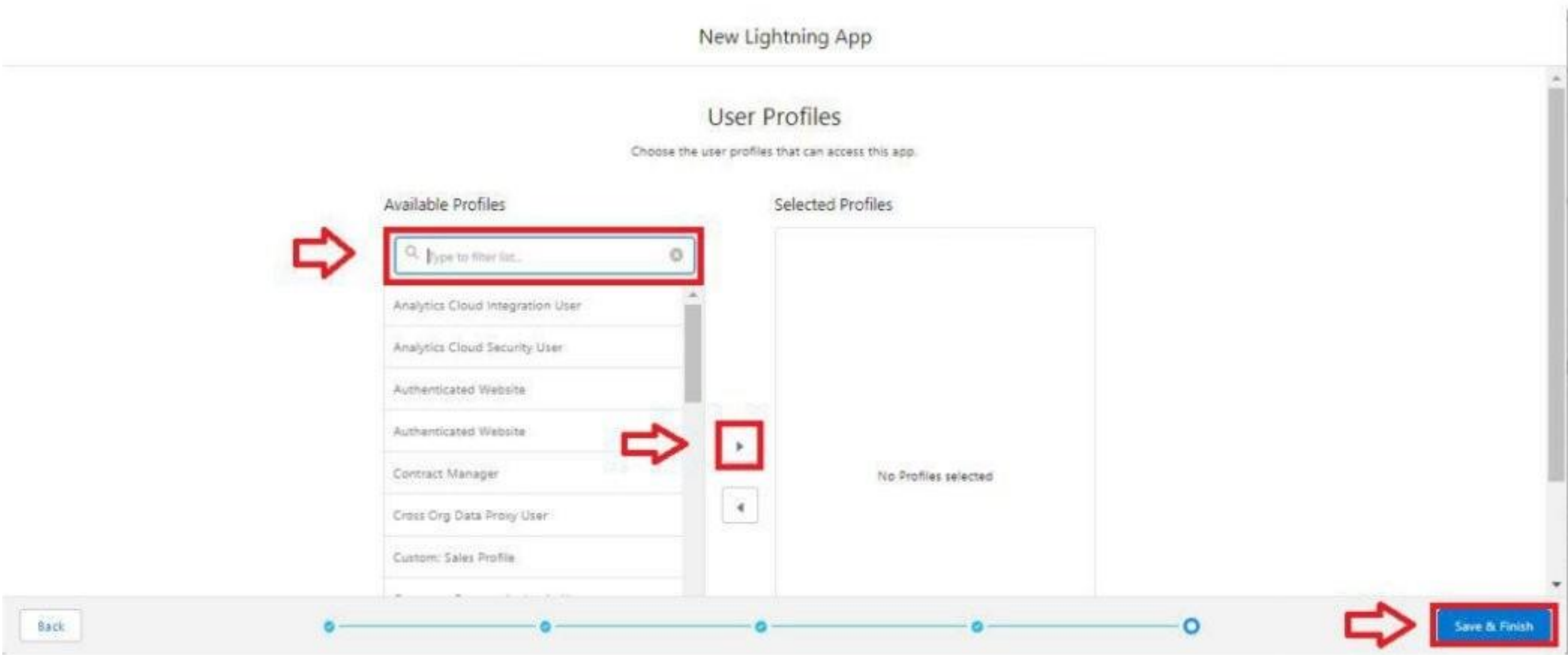

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Milestone-5 Layouts:

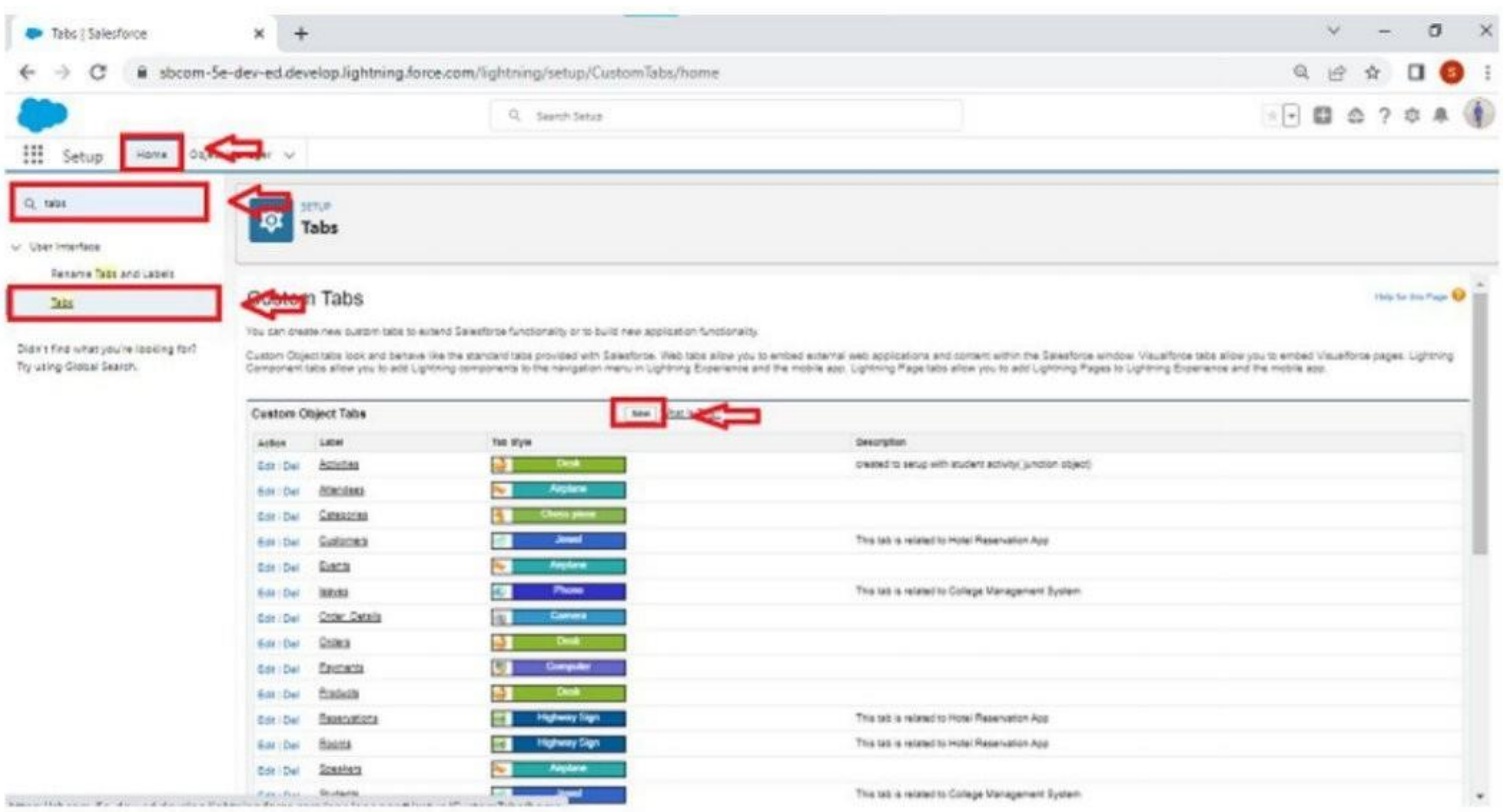
Page layouts control the layout of an object, As a crm product owner create custom page layouts which defines which fields the user can view and edit while entering data in objects. And must contain different sets of fields and related lists.

Custom Page layouts
1) Warehouse page layout
2) Sales order layout
3) Dispatch/Tracking layout

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 New.
3) For Object, select Warehouset.
4) For Tab Style, select any icon.



5) Leave all defaults as is. Click Next, Next, and Save.
6) In the same way create other objects such as students and parents.

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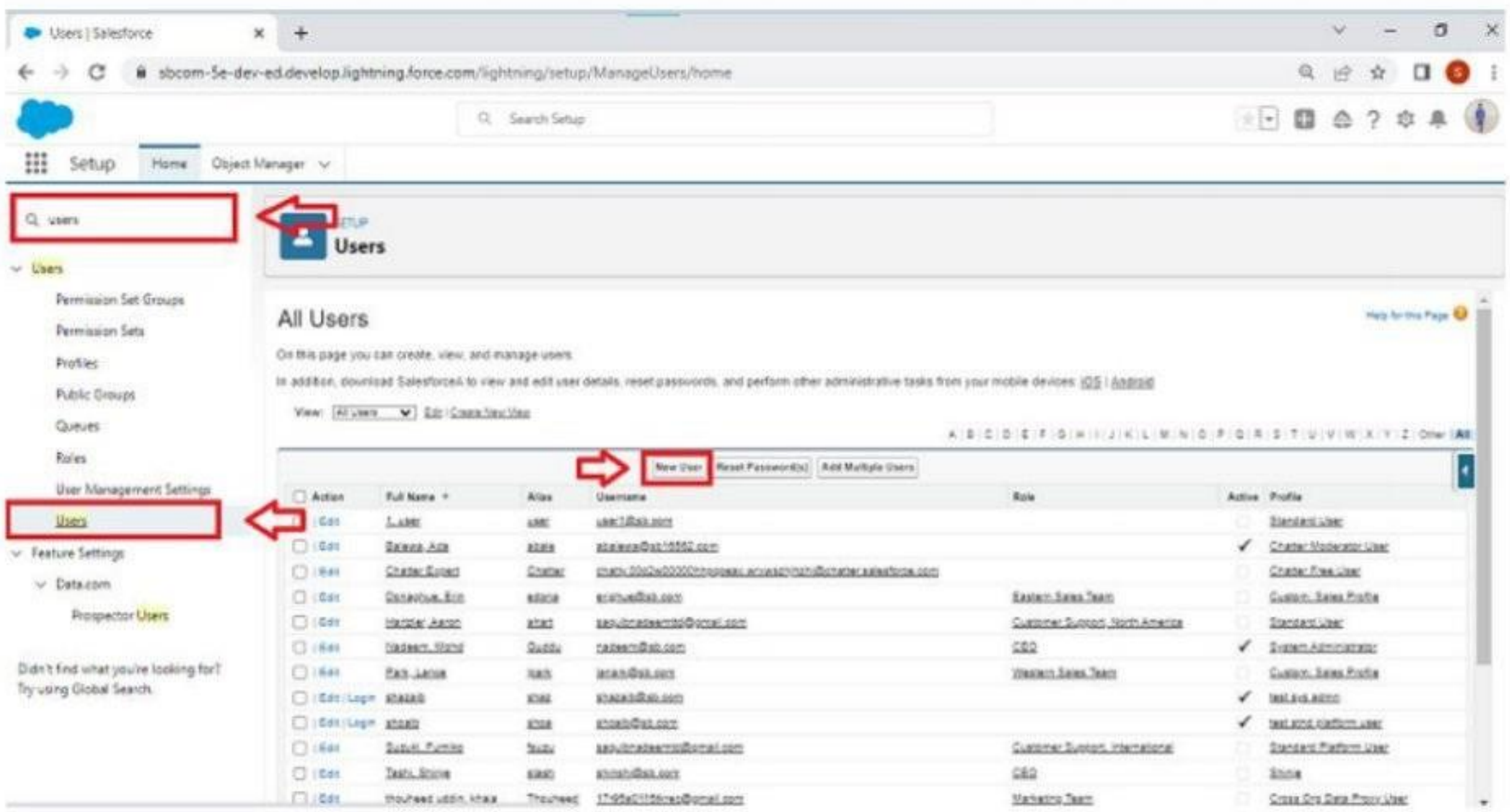
Milestone-6 User:

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

Activity-1:

Creation of user

1) Navigate to setup in quick find search bar
2) Type user in and select it and click on new user.



3) Give the first name and last name.
4) Enter your email in the email field.
5) Enter username; it must be unique.
6) Select the user license of salesforce.
7) In the profile field select standard platform profile.

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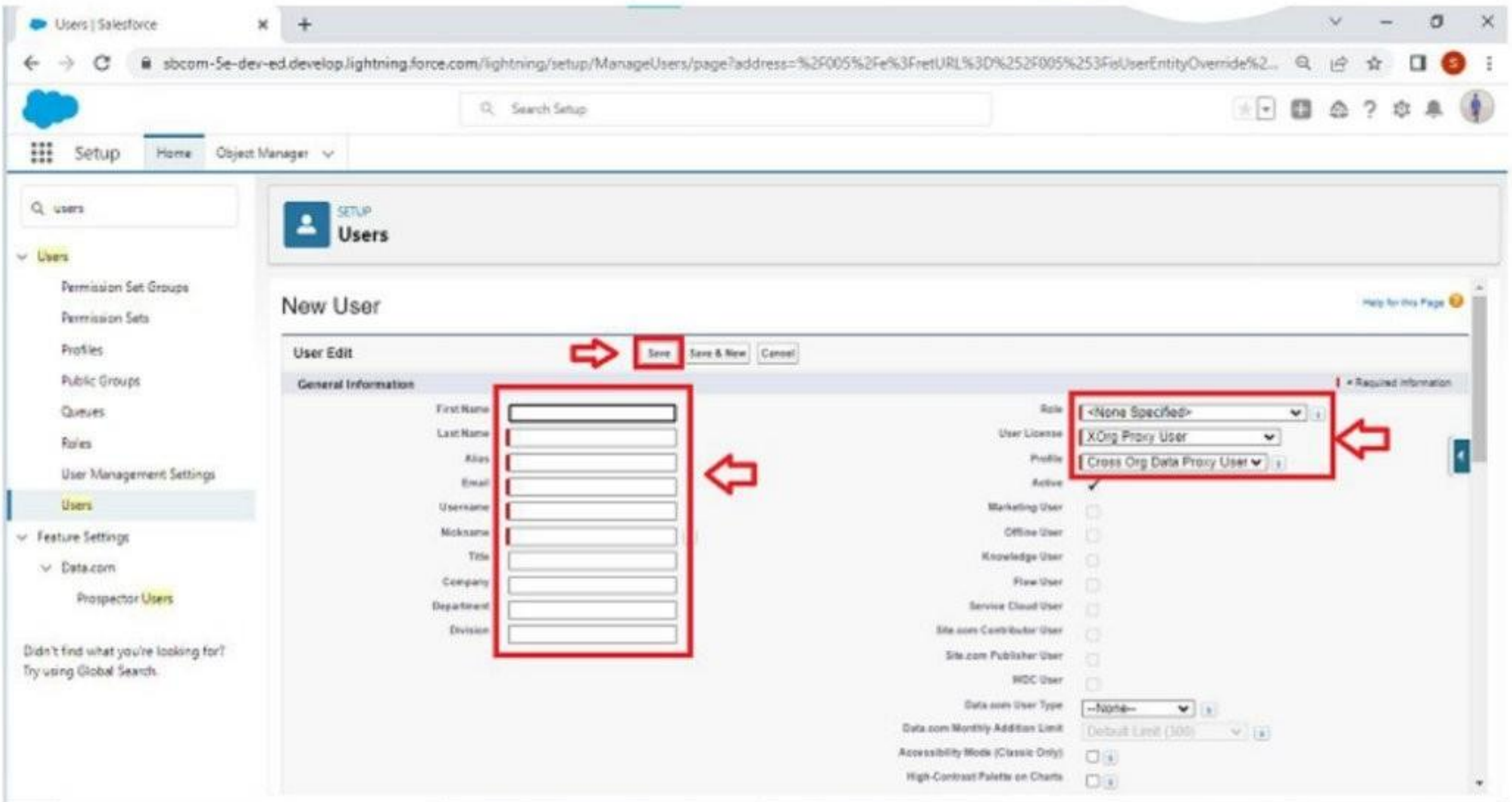

8) At the bottom of the page check the box to generate a new password and notify the user immediately.

Milestone-7 Validation Rules:

Validation rules verify that the data a user enters in a record meets the standards you specify before the user can save the record. As a crm product owner they requested to create a validation rule on account object on the phone field.

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.

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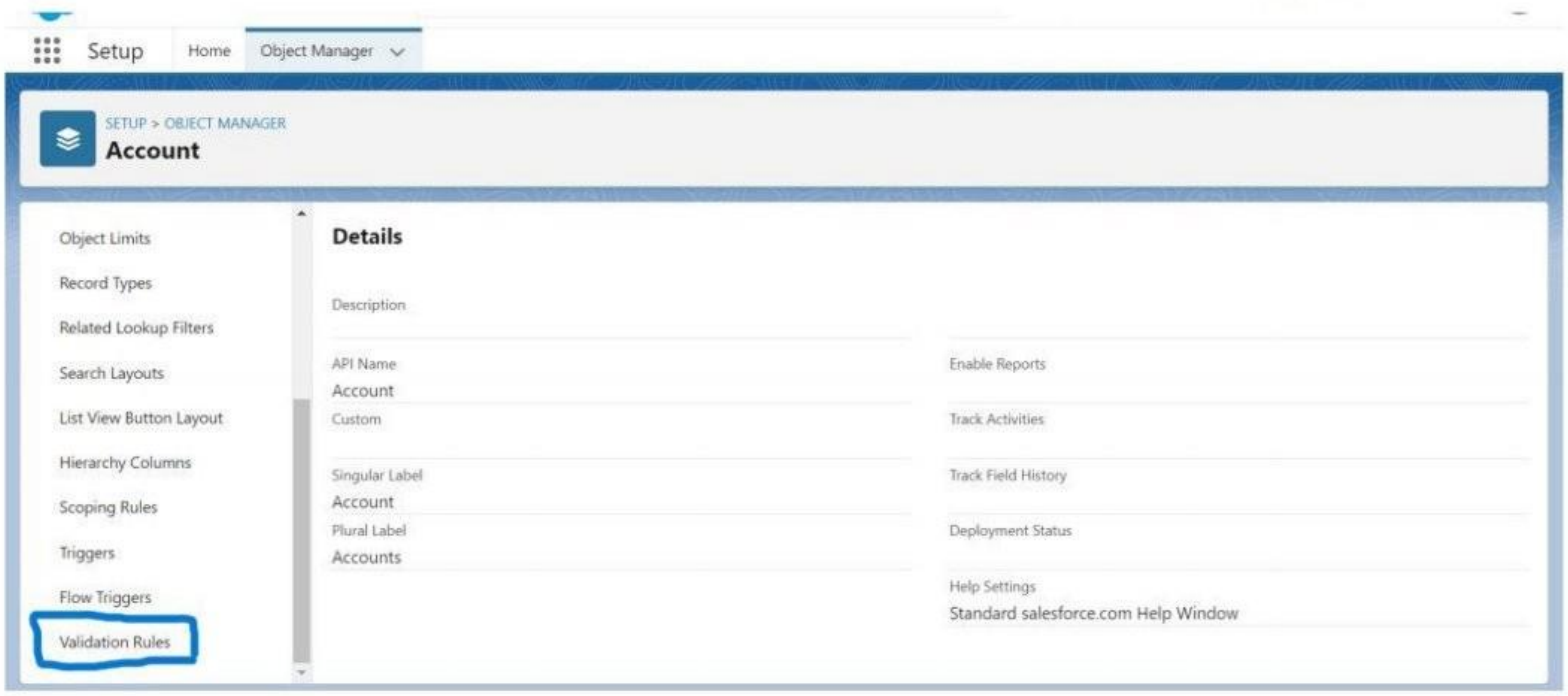
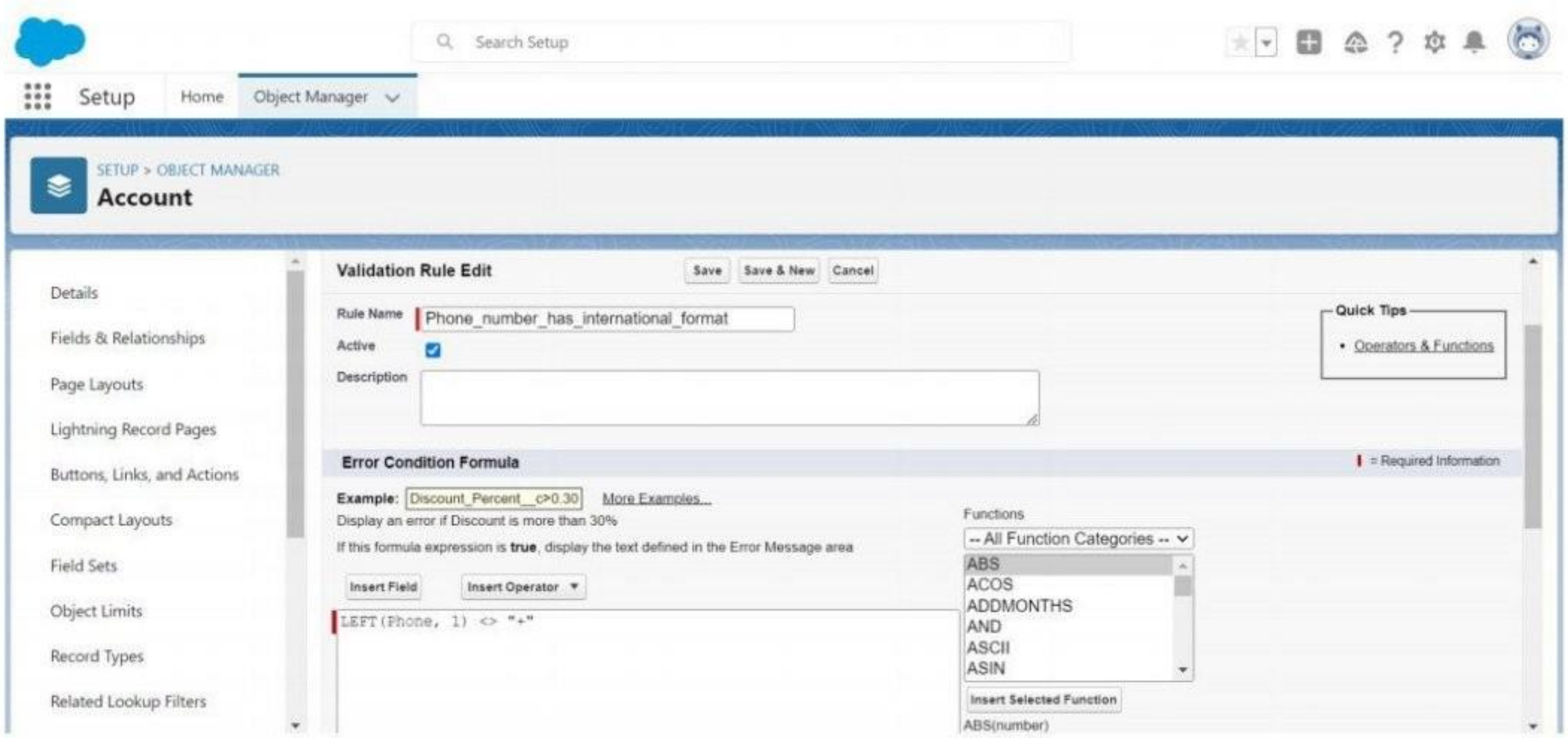


3) Click new, give the label name and in edit error conditional formula give the formula hasLEFT(Phone, 1) <> "+".



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.

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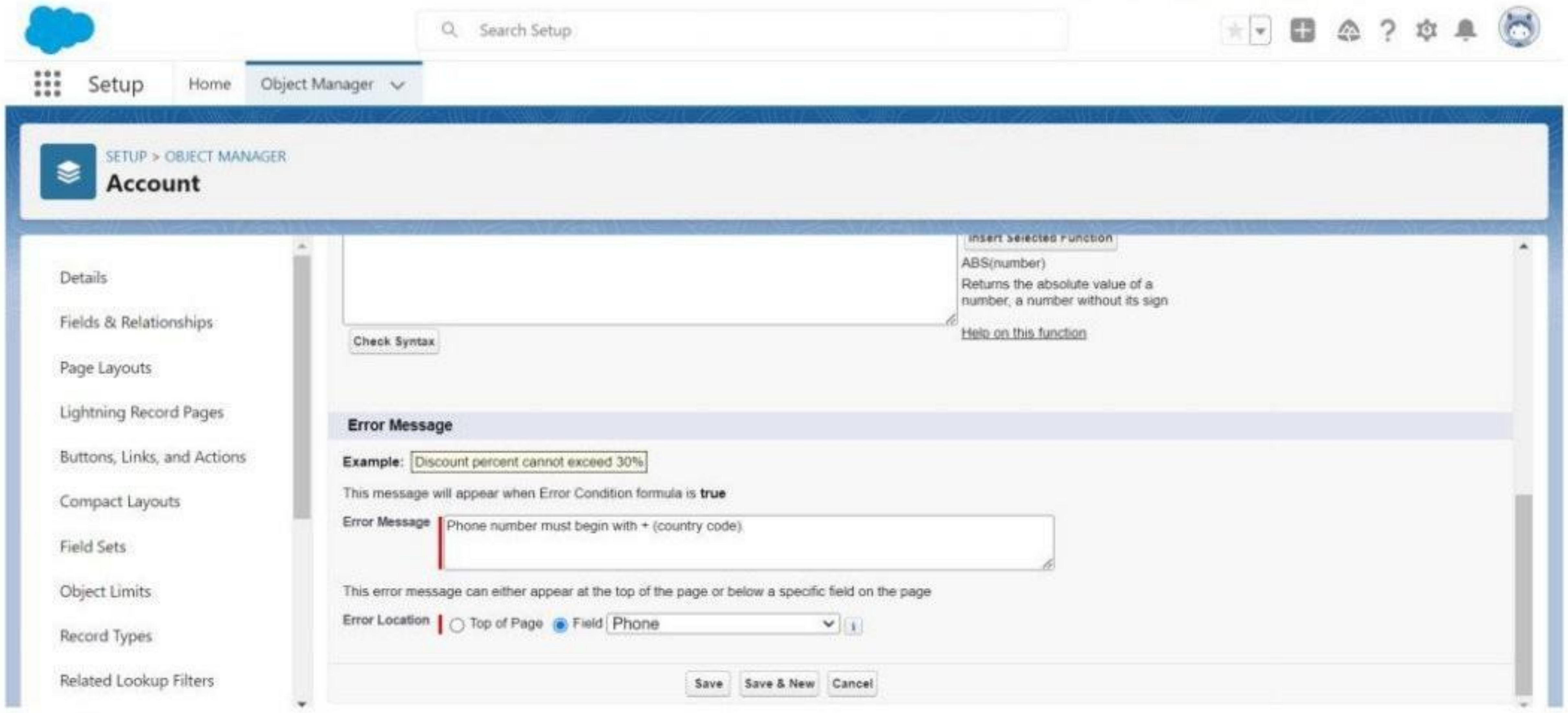


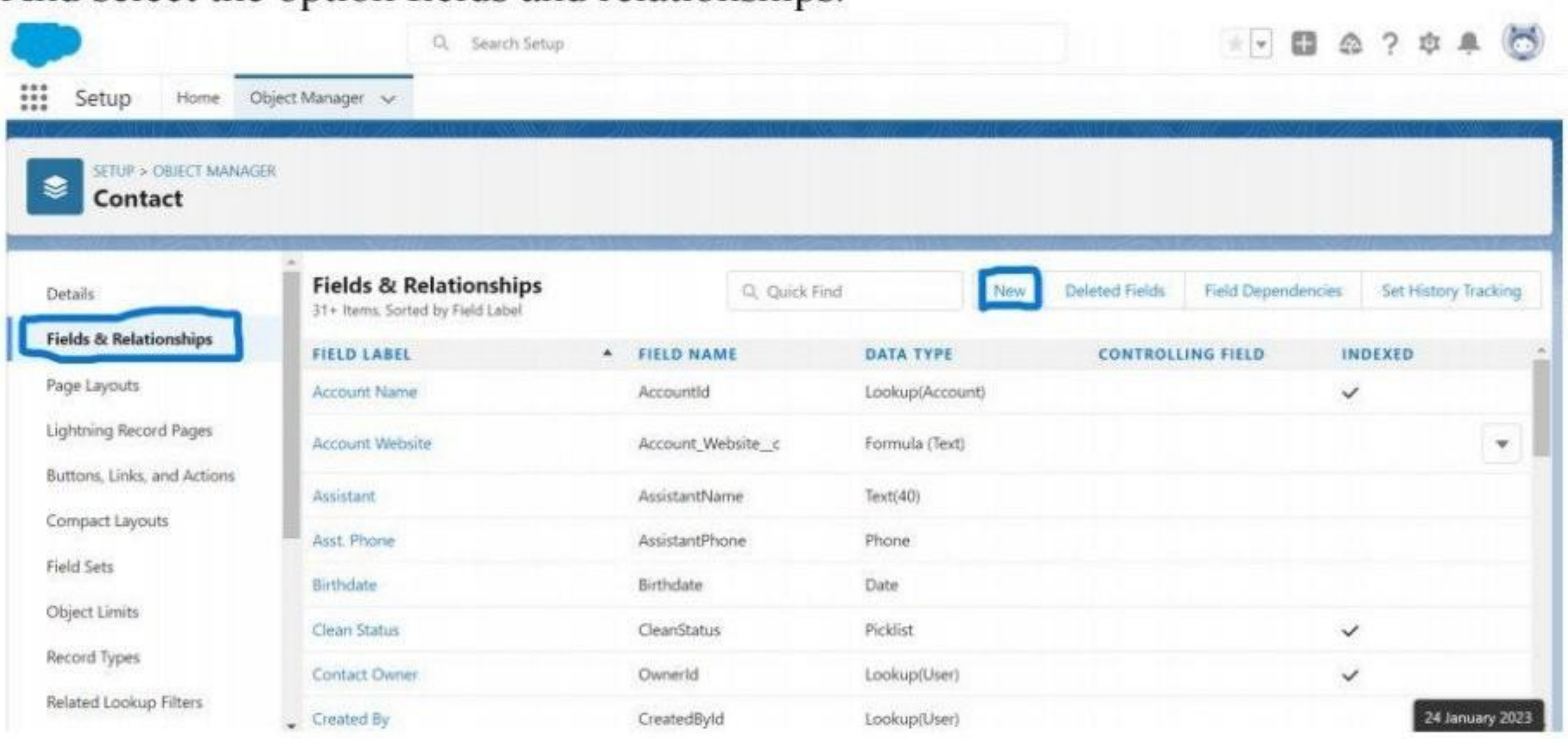
Activity-2 :

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.



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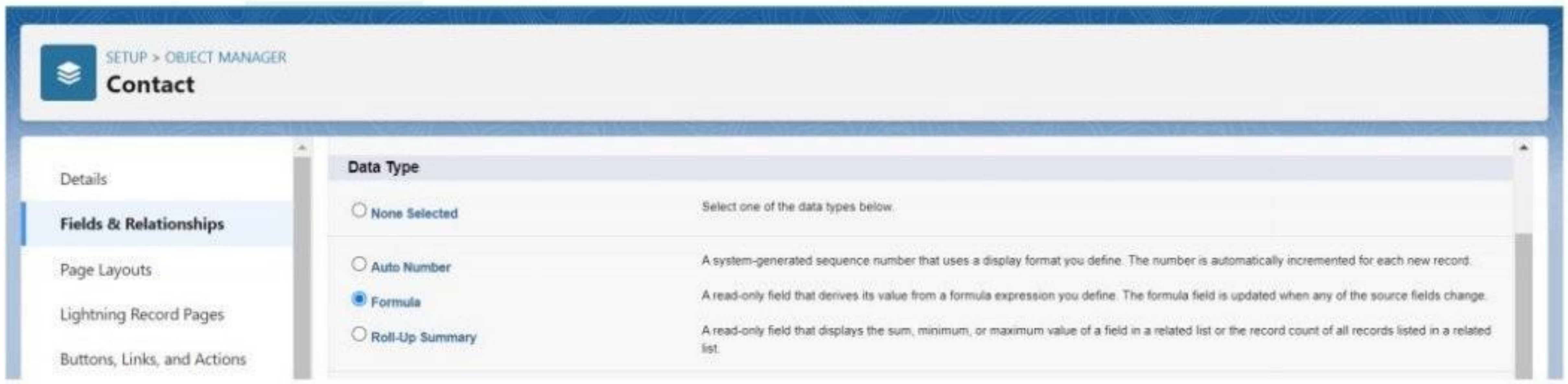
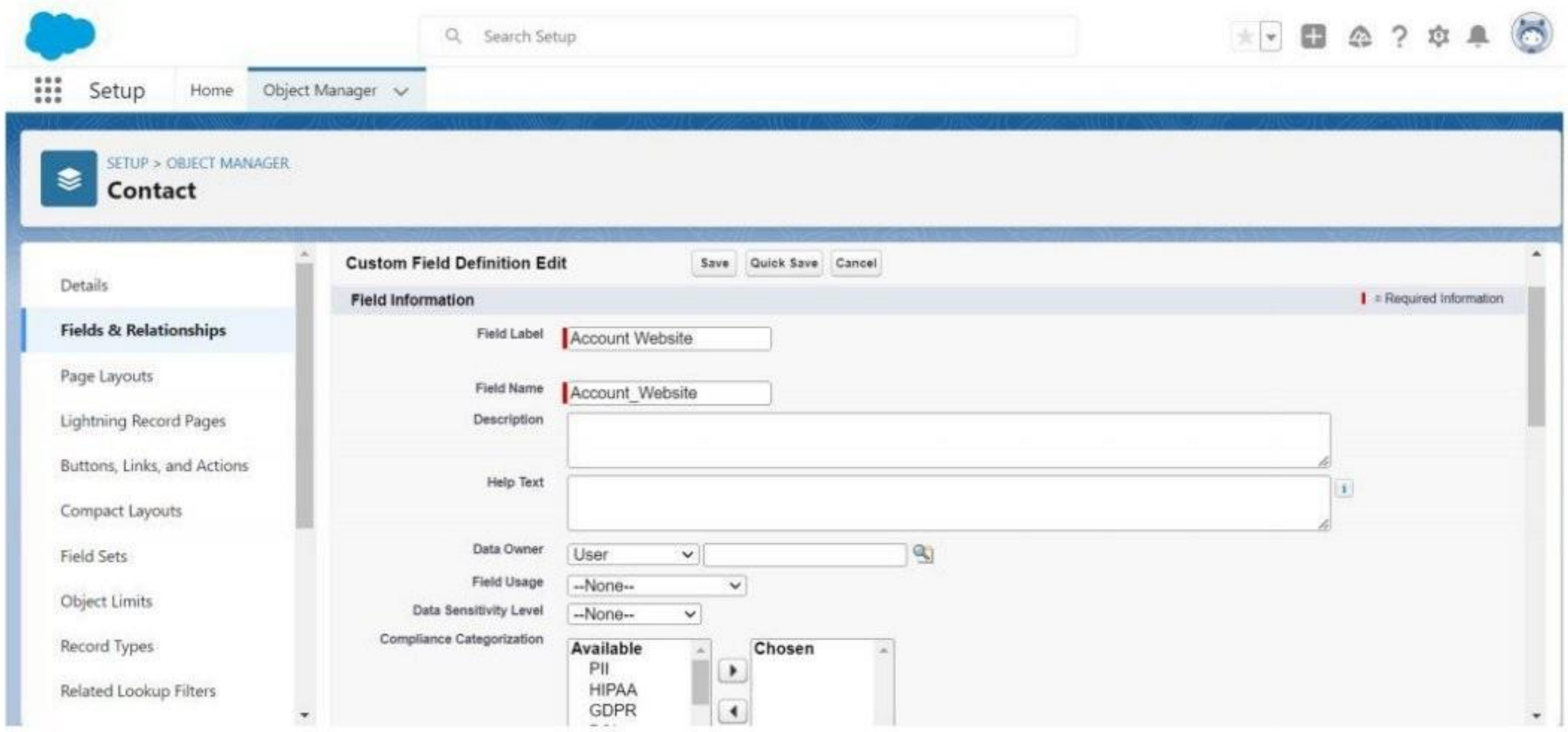
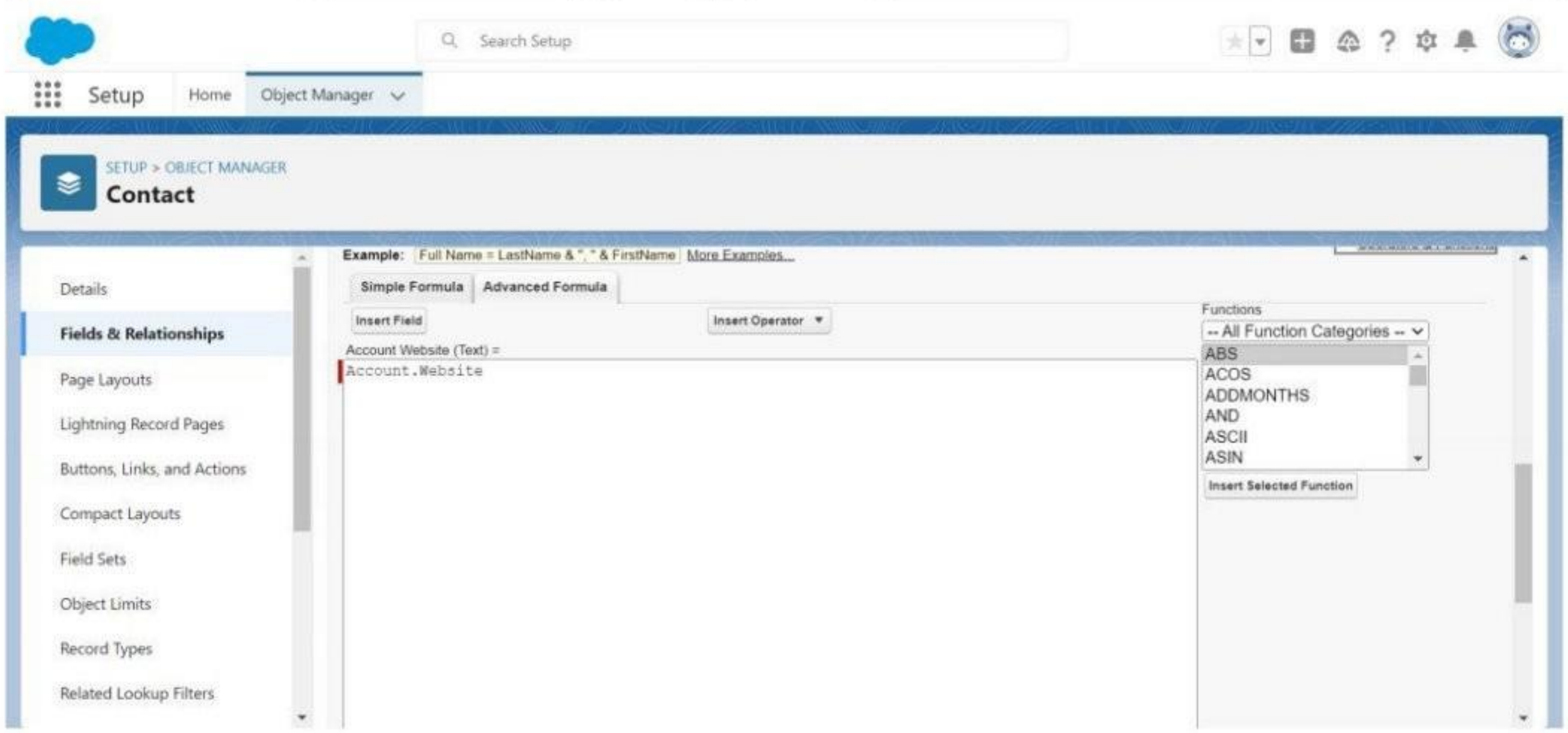
3) At the top right side you can find a new select that option.
4) Now you have to select data type, formula Has data type.



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.





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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.

Milestone-7 Reports :

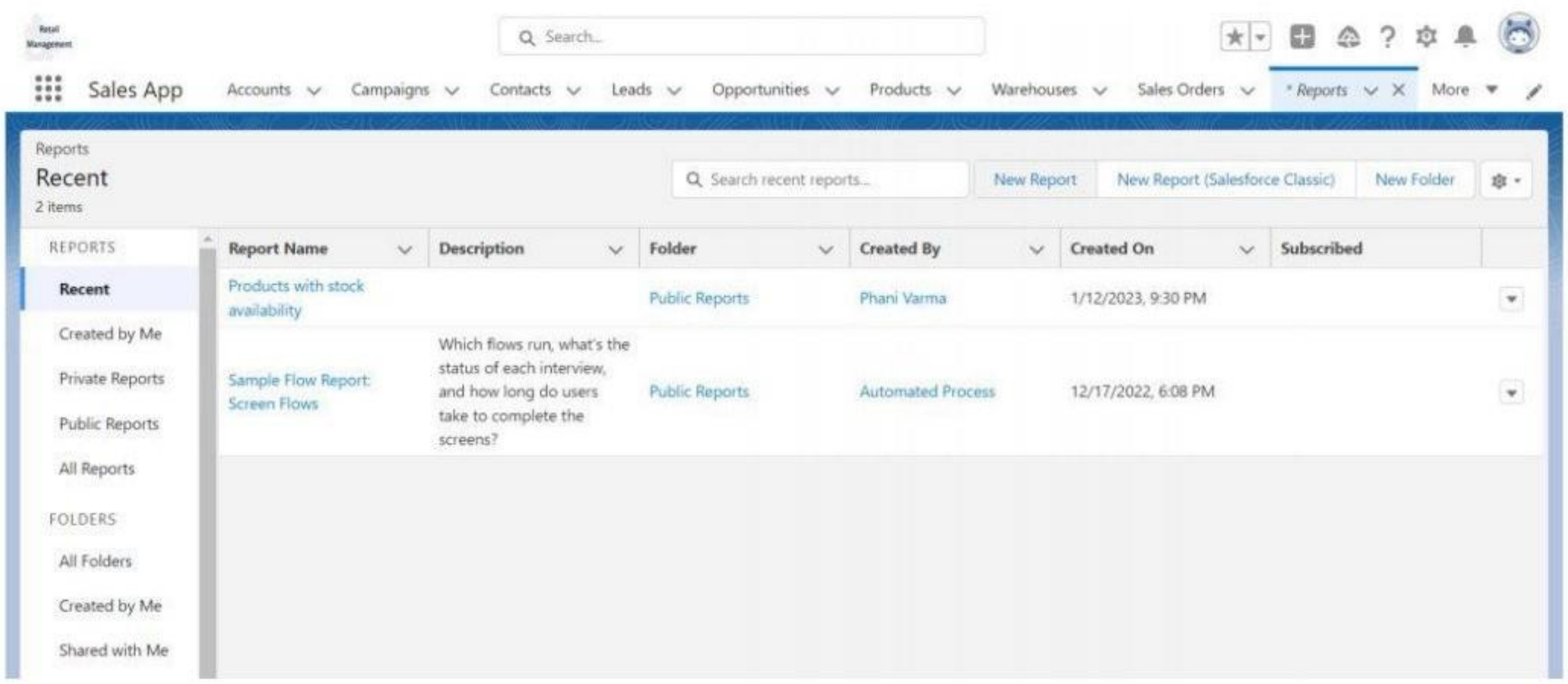
A report is a list of records that meet the criteria you define. It's displayed in Salesforce in rows and columns, and can be filtered, grouped, or displayed in a graphical chart. Every report is stored in a folder. Folders can be public, hidden, or shared, and can be set to read-only or read/write.

Activity:

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.

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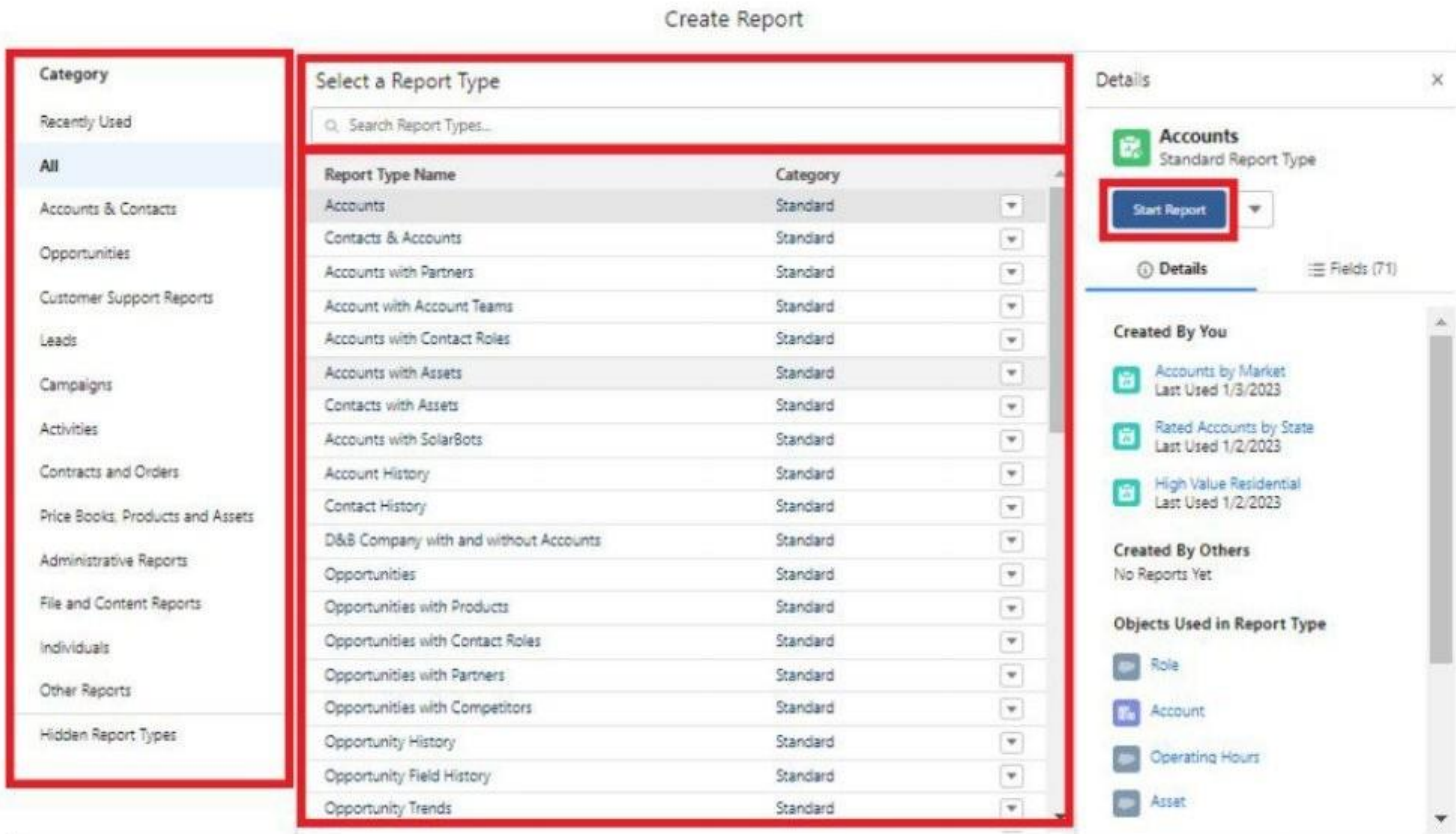
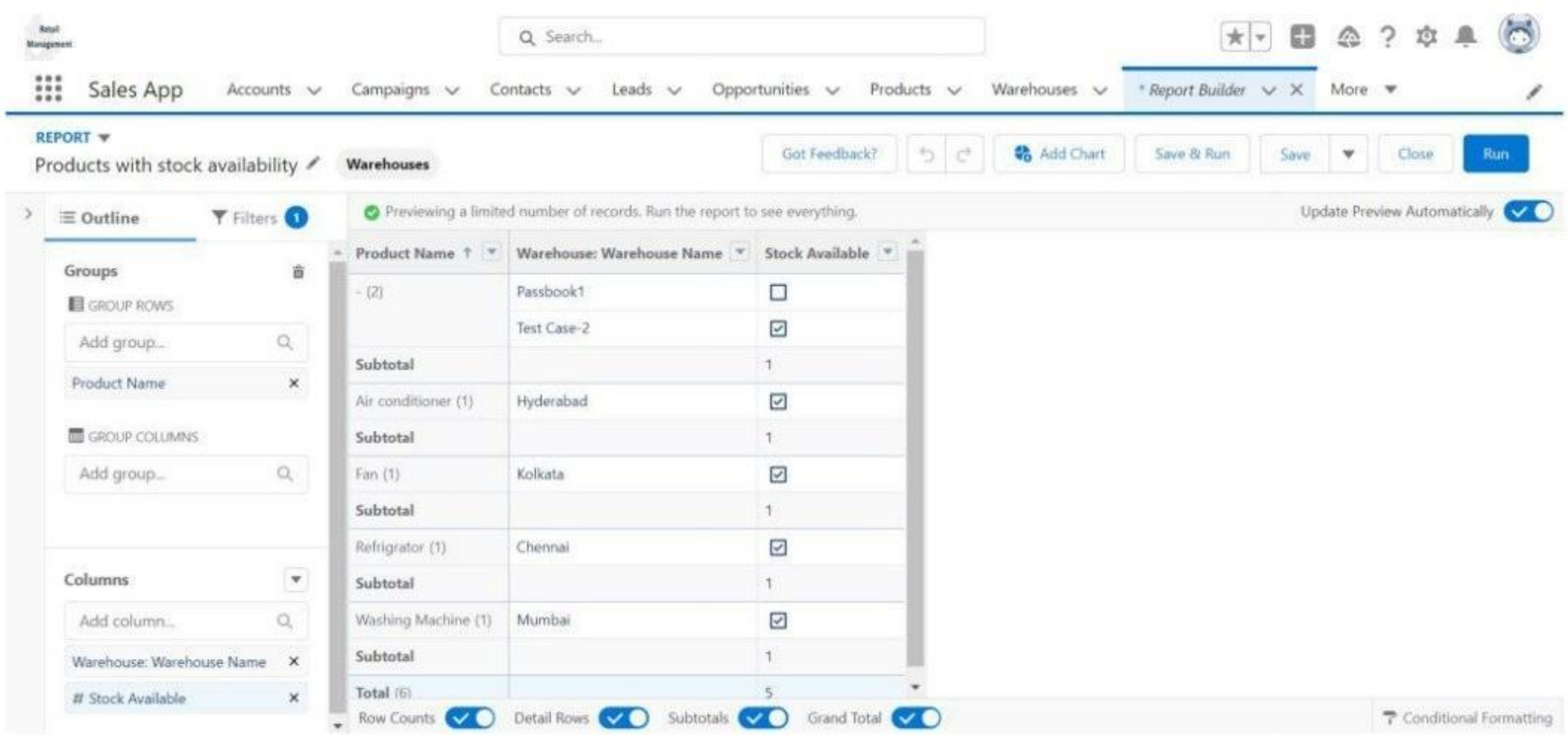


4) Select the start button to create a new report.



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.

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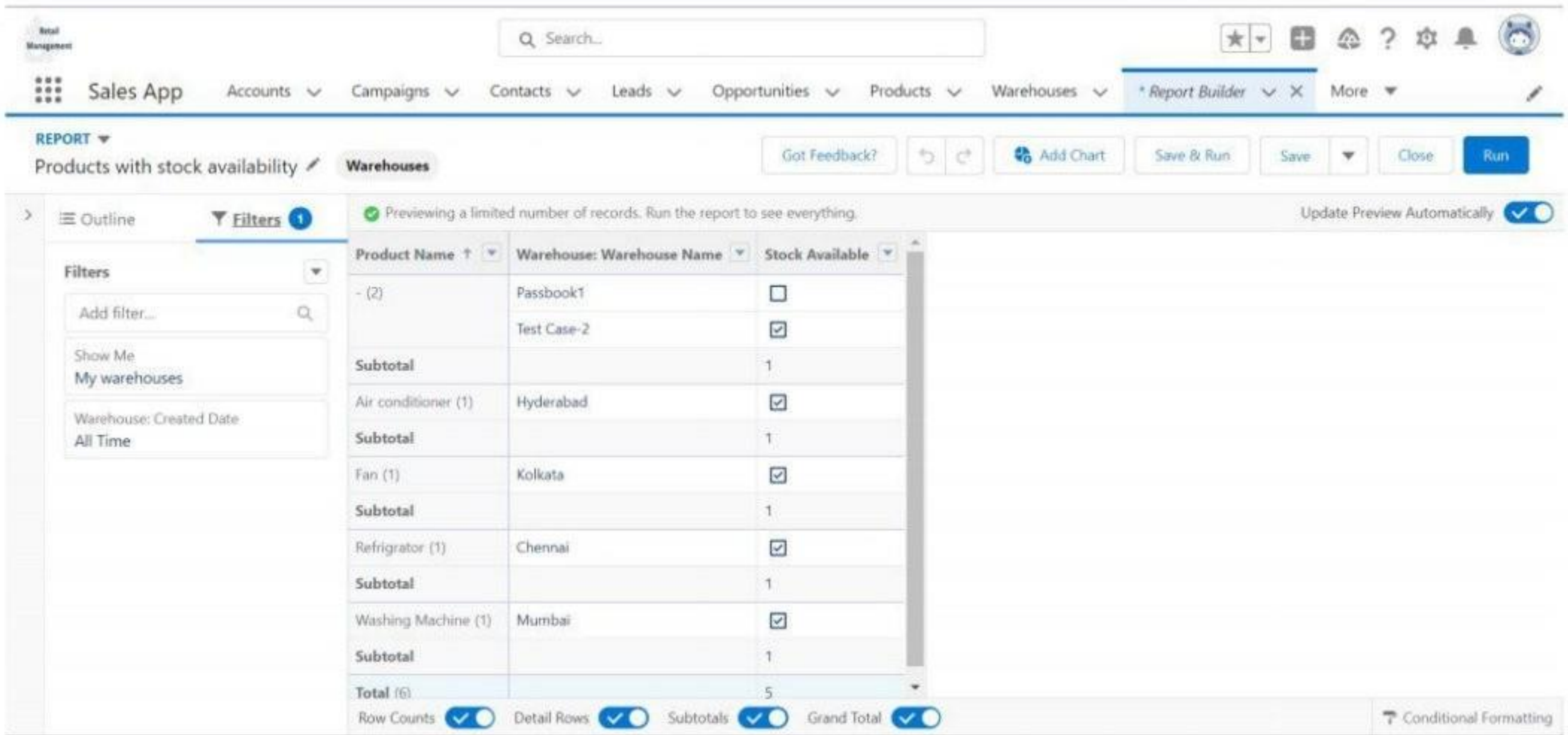

10) And give the label name products with stock availability.
11) Click on save and run for saving the report.

Milestone-8 Dashboards:

Dashboards in Salesforce are a graphical representation of Reports. It shows data from source reports as visual components.

Activity

Creation of Dashboard

1) Click on the app launcher and search for dashboards.
2) Select the new dashboard option.

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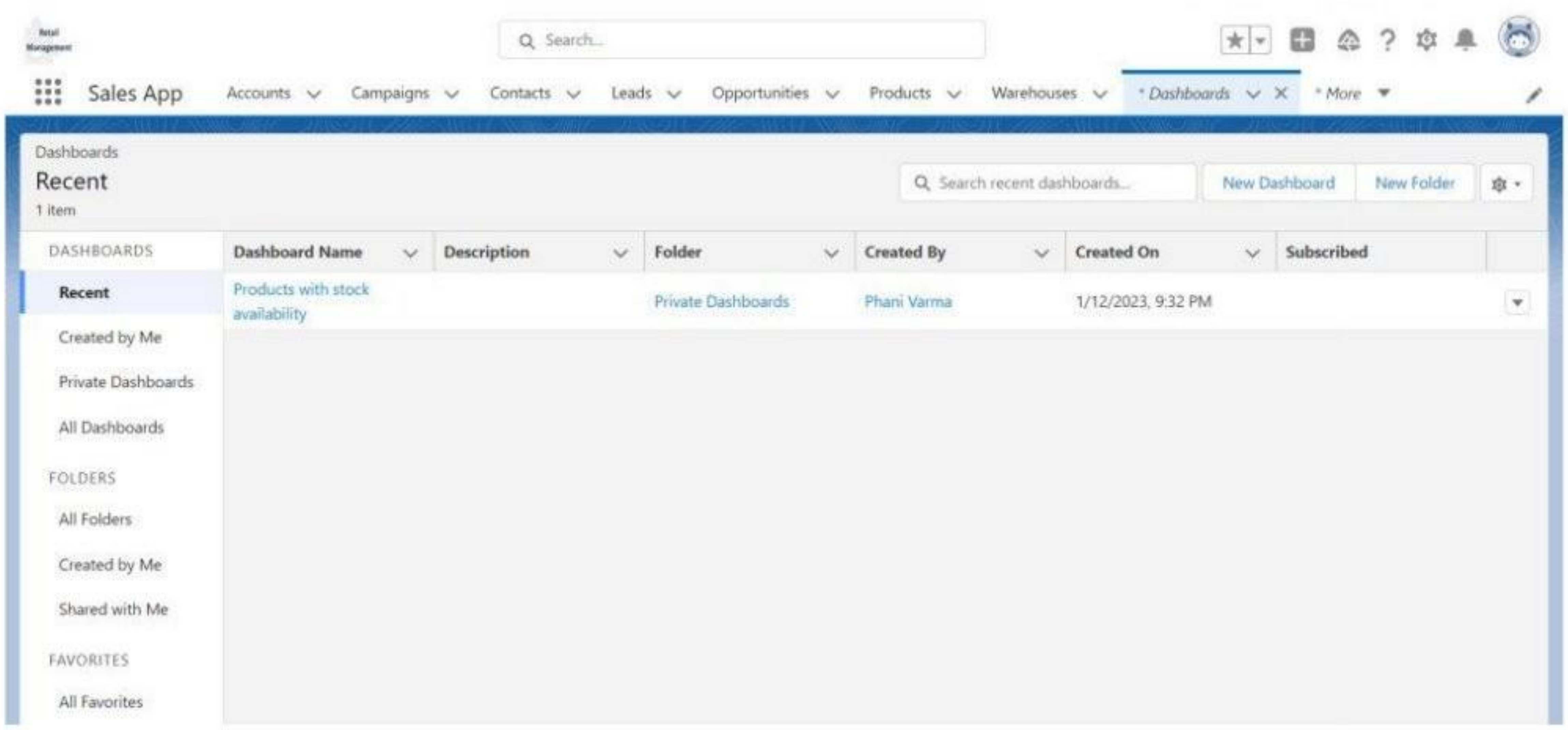
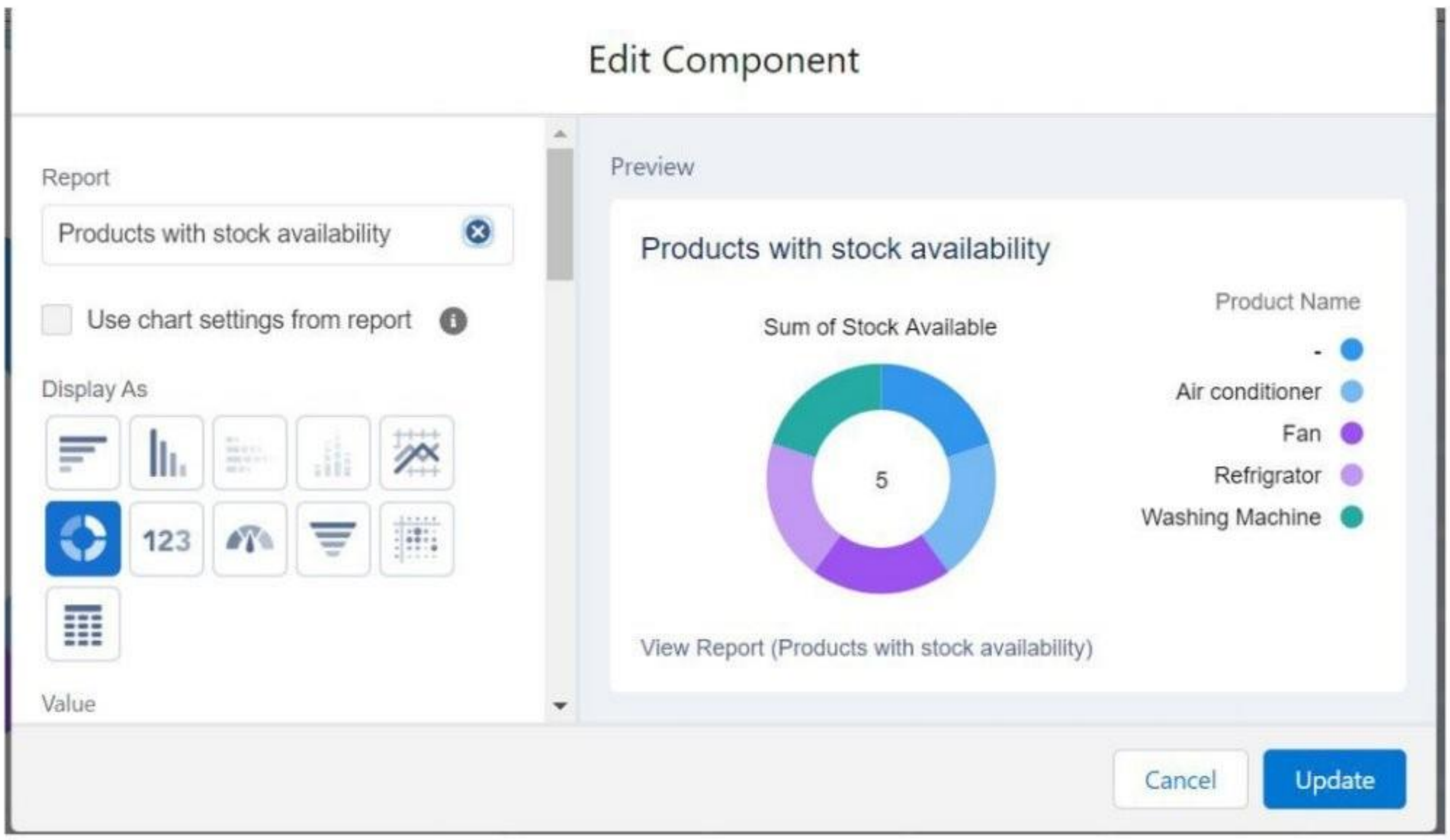


3) Name the dashboard has a products with stock availability.
4) And select create option.
5) Now click on Add component and for report select passport with locations.
6) Select the donut chart in display as section.



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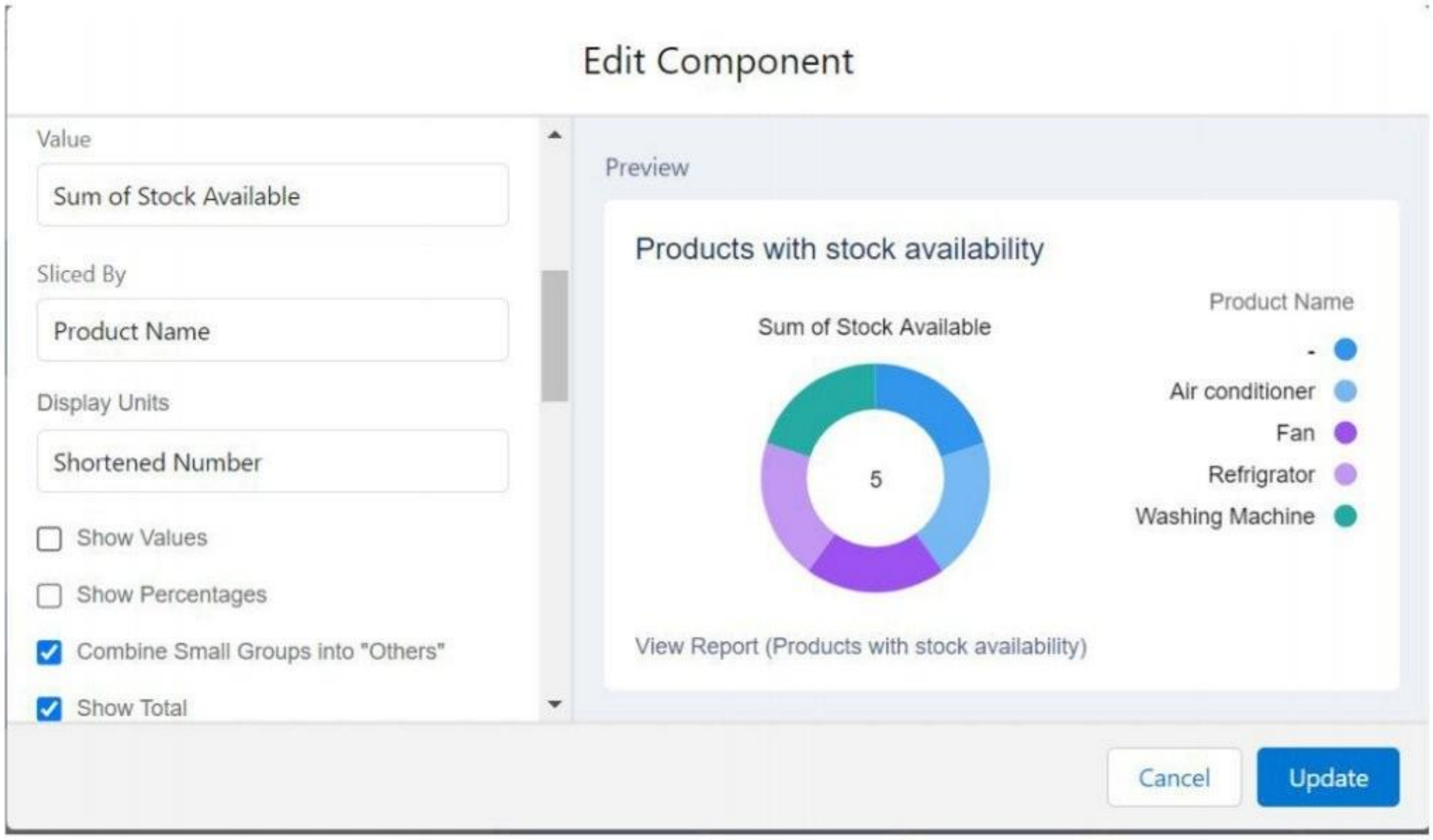
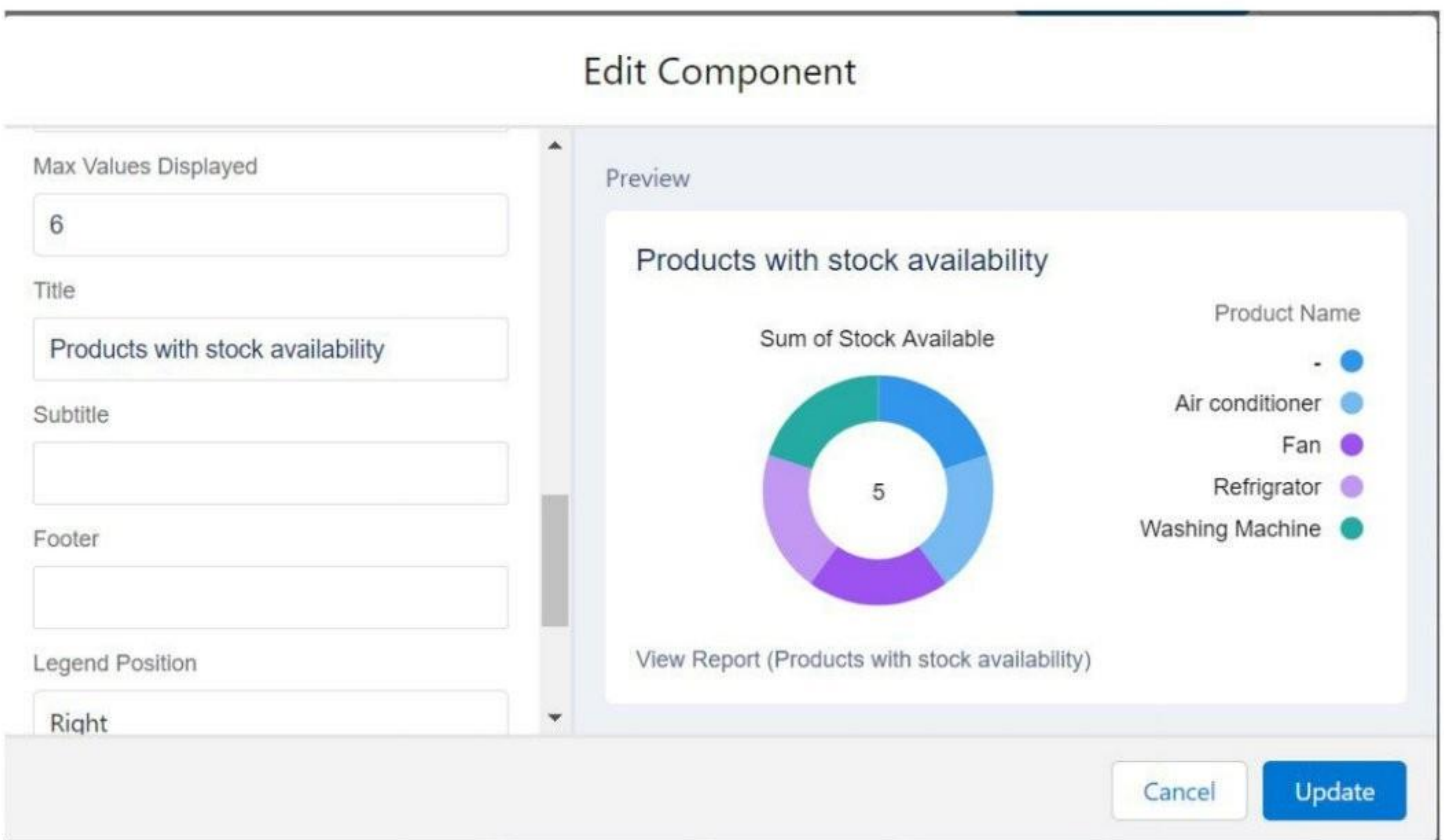


7) Ensure that value is record count and sliced by product name.



8) Leave the default values.
9) Click on add.
10) And save the dashboard.

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