Project Report On

Implementing A CRM Application On E-Commerce Activities

(DEVELOPER)-(Long-Term)

Milestone -01:Create Salesforce Org

Go to developer.Salesforce.com/Signup

Click on Sign up.

On the Sign-up form,enter the following details:

1.Fist name &Last name -V.THANUSRI

2.Email-krevanth282@gmail.com

3.Role:Developer

4.Company:GAYATRI DEGREE COLLEGE - TIRUPATI

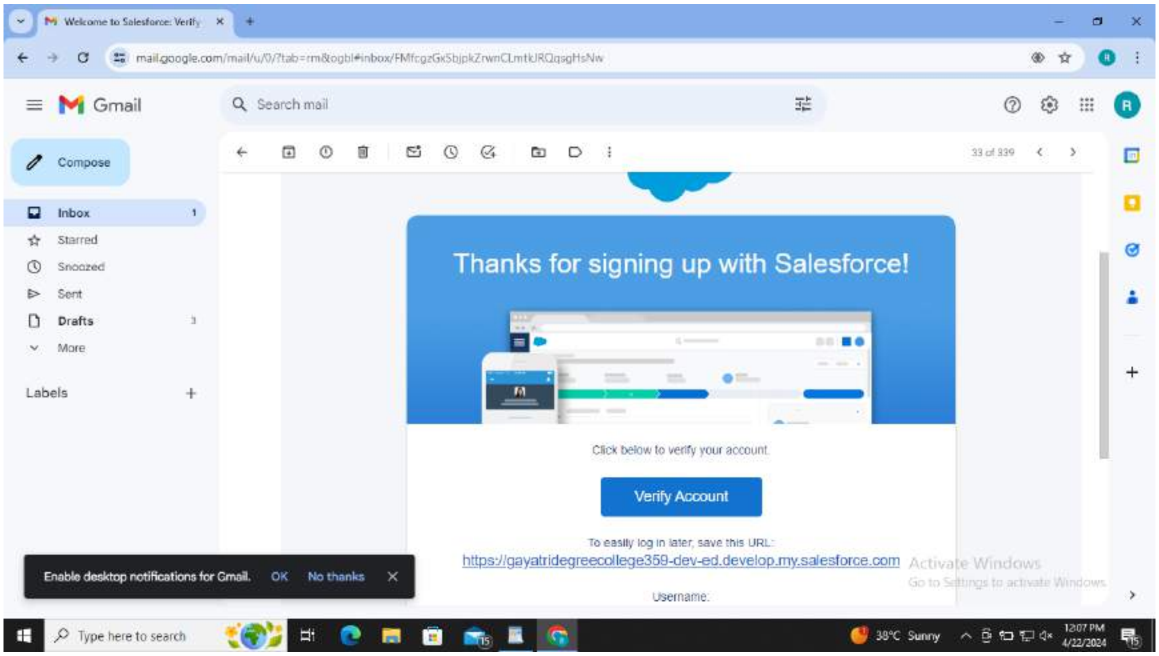
5.County:India

6.Postal Code:517501

7.Username:krevanth@2004.com

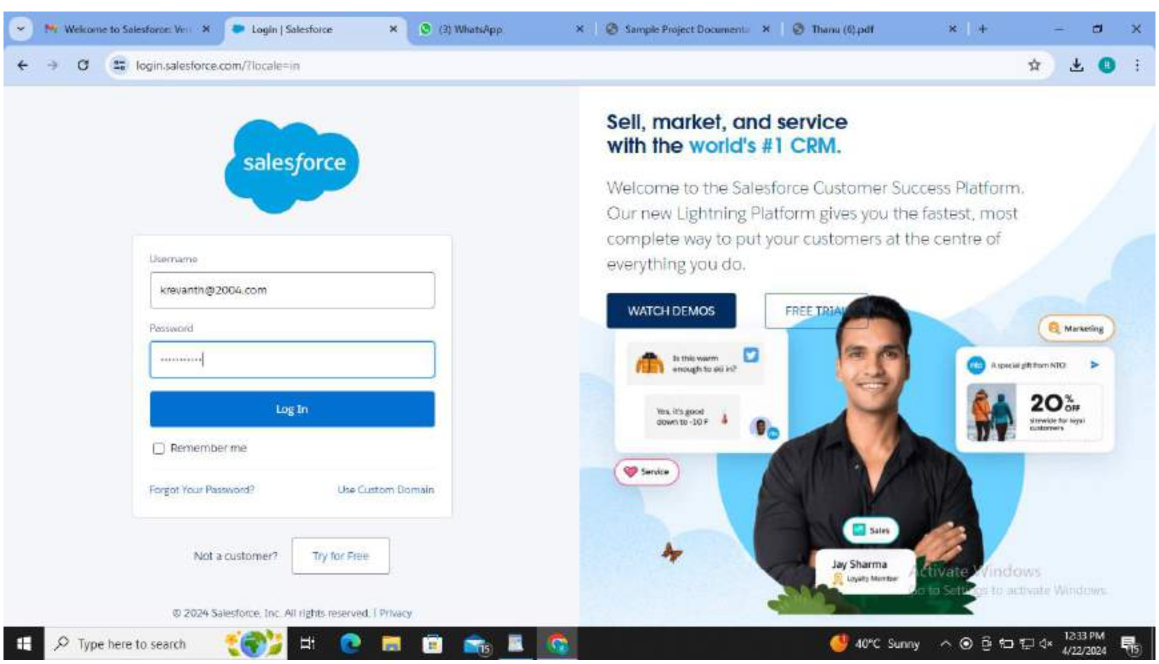
Account Activation

1.Go to the inbox of the email that 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.



Milestone – 02: Creation of Objects

Create Translists Object

1. From the setup page ->Click on Object Manager ->Click

   On Create -> Click on Custom Object.

1) Enter the label name-> Translist

2) Plural label name-> Translists

3) Enter Record Name Label and Format

   Record Name -> Translists Name

   Data Type -> Name

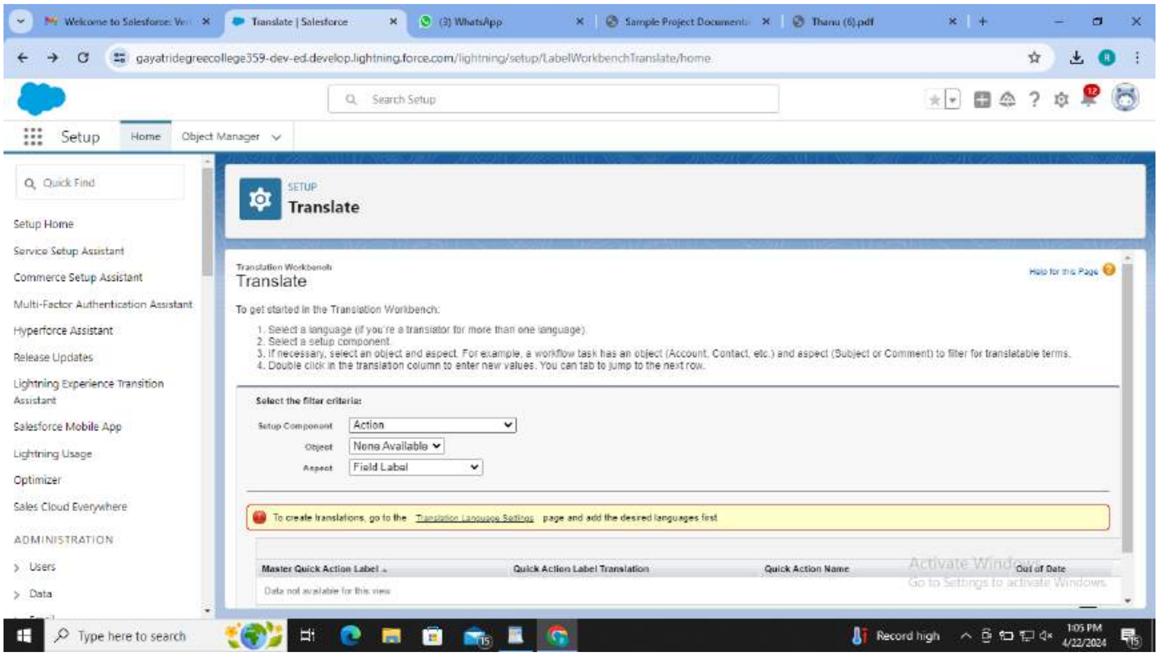
2. Click on Allow reports and Track Field History,

3. Allow Search ->Save.

4. Here we created translists object to store all the transaction data that is done in a praticular commerce site.And this data,that is acquired is useful to identify the potential customers and therefore used to retain the valuable customers.

USE CASE:

By using Translists object, we can store all the transaction records inside this object.And the most important application is we can identify the interested customers and retain them.



Create Details of Details of Customer Object

1) Enter the label name-> Detailsofcustomer

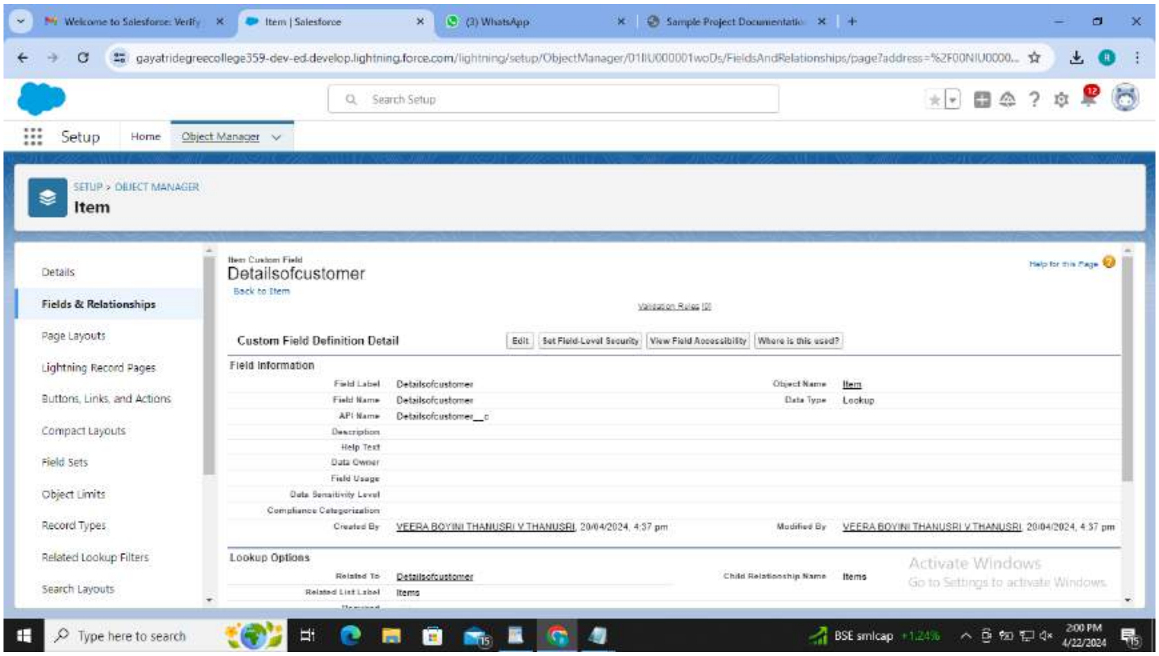
2) Plural label name-> Detailsofcustomers

3) Enter Record Name Label and Format

Record Name ->Detailsofcustomer Name

Data Type -> Name

- Click on Allow reports and Track Field History,
- Allow search -> Save.



USE CASE :

Using the Detailsofcustomers object, we can get the details of customers like Name, contact number, mailid and other personal details and we can effectively communicate with the customers and retain the valuable customers.

Create Item Object:

From the setup page -> Click on Object Manager ->Click on Create ->Click on Custom Object.

1) Enter the label name-> Item

2) Plural label name-> Items

3) Enter Record Name Label and Format

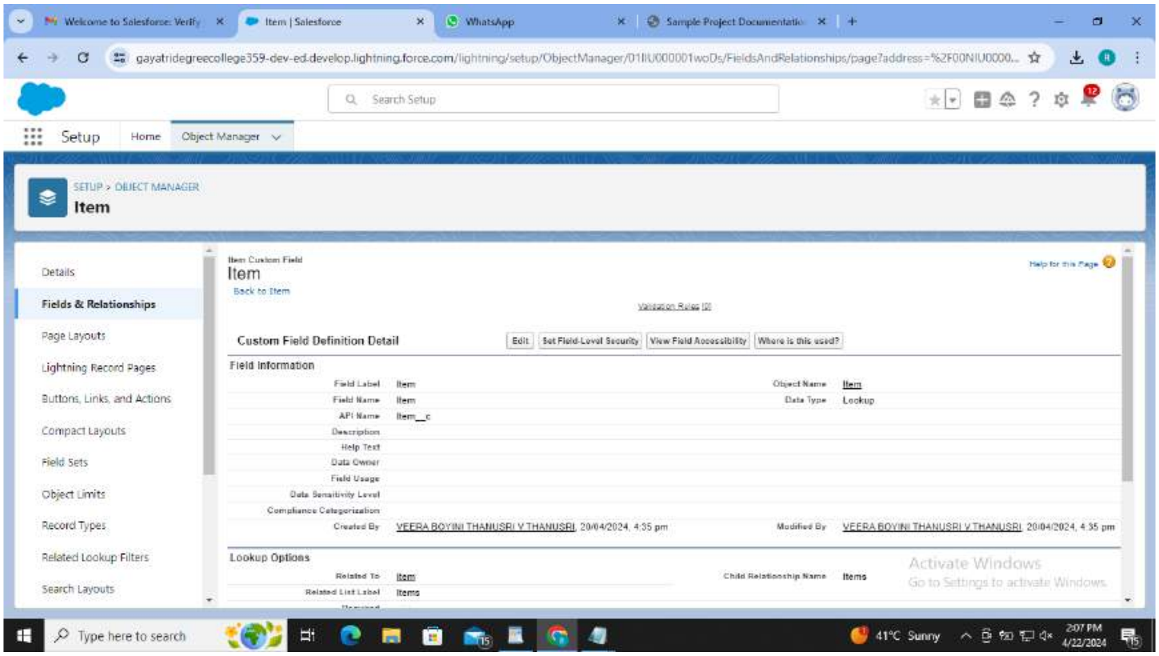
Record Name -> Item Name

Data Type -> Name

- Click on Allow reports and Track Field History,

- Allow search -> Save.

- Here we created translists object to store all the transaction data that is done in a particular commerce site. And this data, that is acquired is useful to identify the potential customers and therefore used to retain the valuable customers.



Creating A Custom Tab For Translists

Go to setup page -> type Tabs in Quick Find bar -> click on tabs -> New (under custom object tab)

Select Object (Translists) -> Select the tab style -> Next (Add to profiles page) keep it as default -> Next (Add to Custom App) uncheck the include tab ->Save.

Make sure that append tab to users' existing personal customizations is checked.

Note : Similarly, create tabs for Items and products.

Creating Fields For Translists Object

Steps to Create a Field in an Object:

While still on your salesforce account, navigate to the gear icon present in the top right corner. You will notice Setup and click on setup.

You will now be navigated to the setup page, and click on object manager and search for object “translists”.

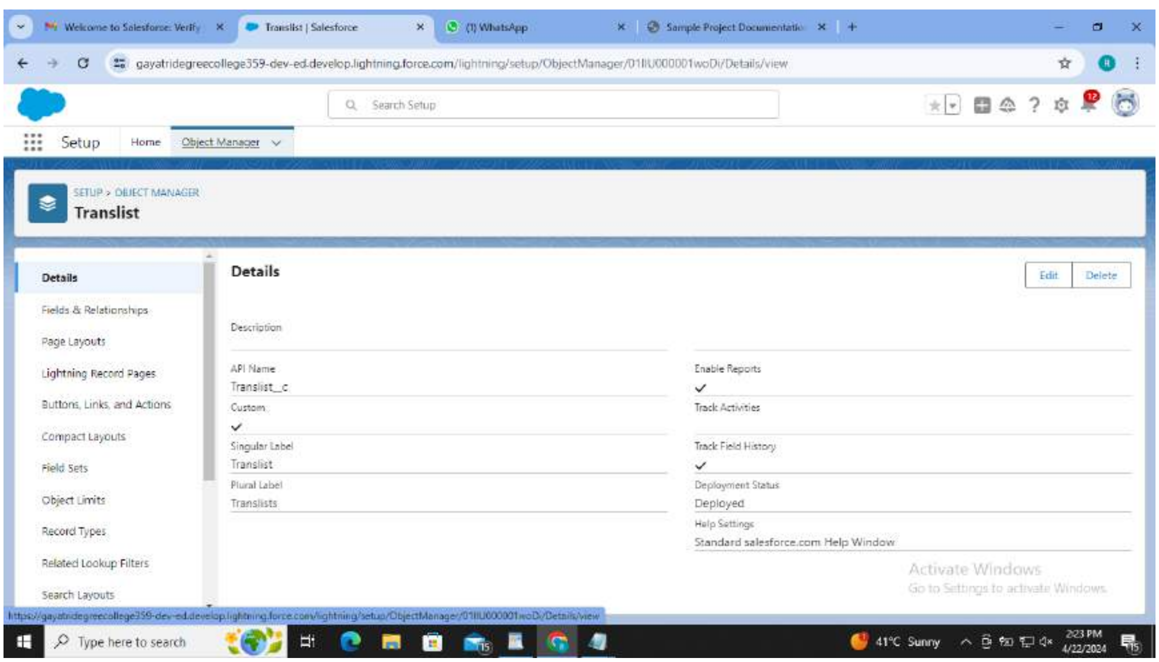
1. Click on “Fields & Relationships” in the left panel.

2. Click on New and choose the data type that is required by the field you need.

3. Click next and fill the following details in the mentioned.

4. Click Next, Next and click on “Save and New”.

Note :Repeat the same steps to create the fields TransId, listname, ContactNo, Mailid, DateofTrans, subTot, discount, grandtot.



Fields in Translists objects follow below data types:

S No

Field Label

Data Type

TransId

Number(18,0)

listname

Text(25)

ContactNo

Phone

MailId

EMail

DateofTrans

Date

SubTot

Number(18,2)

Discount

Number(18,0)

GrandTotal

Formula(Number(18,2))

Lookup Relationship Fields :

Itemrelated

Lookup(Items)

detailsofcustomer

Lookup(detailsofcustomer)

Formula Fields :

1. Formula fields are custom fields that automatically provide results based on records and related records. They are a valuable and powerful tool provided by Salesforce to the Admins as they are updated automatically in real-time whenever a record is accessed.

2. In this project, GrandTotalfield uses formula field as a return type, where GrandTotal field is the total amount , after deduction of discount from total expense.

3.Insert Operator : In this , we use arithmetic and logical operators like Add, Subtract, Multiply, Division, greater than, less than, equals e.t.c.

4. Insert Field: Using this button, we get a list of all the fields of current object and we can use them in the formula.

5.Functions : It contains the basic functionalities which can be used in any formula field, such as ASCII, Today, Abs e.t.c.

Create a formula field for Grand total field:

1.Click on insert field and add Subtot__c field.

2. Click on insert operator and insert the operator (-).

3.In the insert operator , insert “(” and “(”.

4.Add the field subtot__c and add operator “*”.

5.Add other field discount__c and “)”, “)”

6.Add operator “/” and value 100.

7.Click on check syntax and make sure no errors are found.

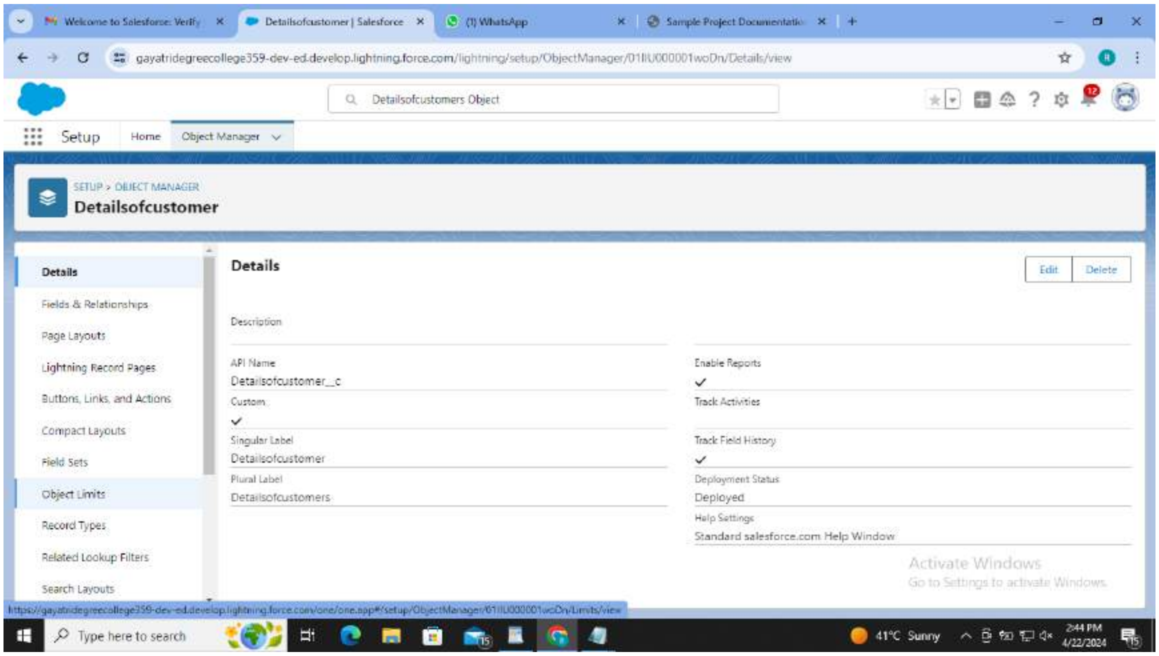
8. Then, click on save.

9. In this , we used the formula :

GrandTotal (Number)

==Subtot__c -((Subtot__c * Discount__c)/100

Creating Fields For Detailsofcustomers Object



1)While still on your salesforce account, navigate to the gear icon present in the top right corner. You will notice Setup and click on setup.

2)You will now be navigated to the setup page, and click on object manager and search for object “Detailsofcustomer”.

3)Click on “Fields & Relationships” in the left panel.

4) Click on New and choose the data type (that is required by the field you need.

5) Click next and fill the following details in the mentioned.

6) Click Next, Next and click on “Save and New”.

Note : Similarly create the fields contno, detailsofcustomer name, mailid and tid.

Field Label Data

Type

Detailsofcustomername text(80)

mailid
Email

Contact no phone

Creating fields for item object

1)While still on your salesforce account, navigate to the gear icon present in the top right corner. You will notice Setup and click on setup.

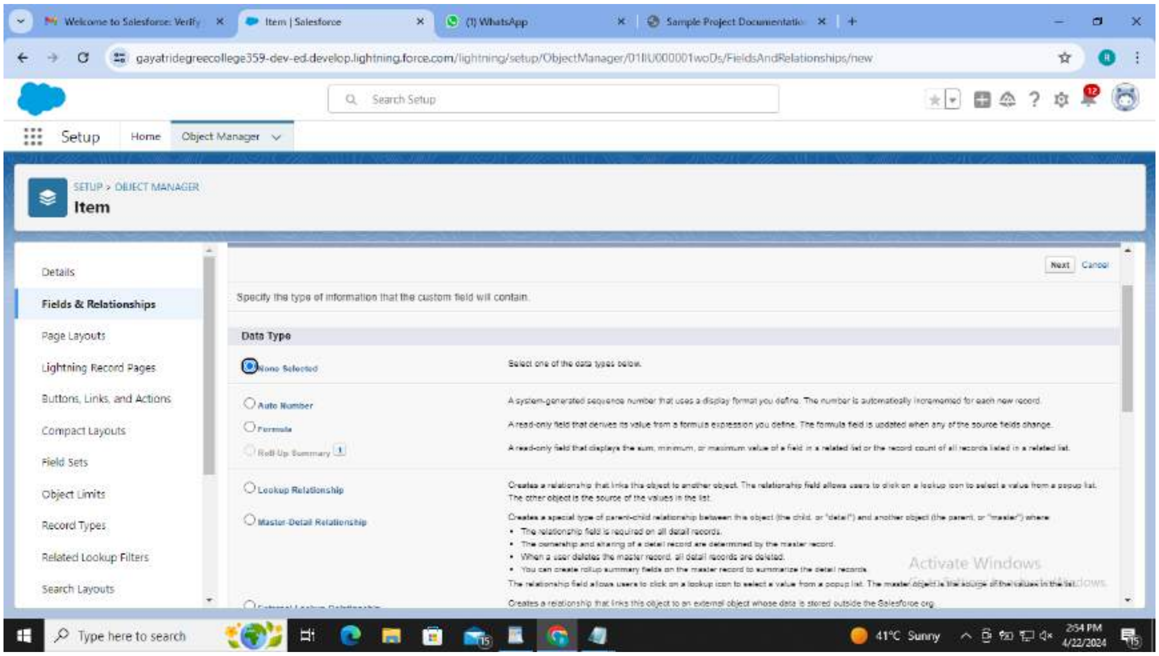
2)You will now be navigated to the setup page, and click on object manager and search for object “Items”.

3)Click on “Fields & Relationships” in the left panel.

4) Click on New and choose the data type (that is required by the field you need)

5) Click next and fill the following details in the mentioned.

6) Click Next, Next and click on “Save and New”.



Milestone – 08: What Are Reports?

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Reports in Salesforce is a list of records that meet a particular criterion which gives an answerto a particular

question. These records are displayed as a table that can be filtered or grouped based on any field.

There are 4 types of report formats in Salesforce:

Tabular Reports:

This is the most basic report format. It just displays the row of records in a table with a grand total. While easy

to set up they can't be used to create groups of data or charts and also cannot beused in Dashboards. They are

mainly used to generate a simple list or a list with a grand total.

Summary Reports:

It is the most commonly used type of report. It allows grouping of rows of data, view subtotal,and create

charts.

Matrix Report:

It is the most complex report format. Matrix report summarizes information in a grid format. It allows records

to be grouped by both columns and rows. It can also be used to generate dashboards. Charts can be added to

this type of report.

Create Report :

1. Click App Launcher

2. Select Candidate Internal Result Card App

3. Click reports tab

4. Click New Report.

5. Click the report type as Semesters with Course Click Start report.

6. Customize your report, in group rows select - Course Name, in group column Select Duration (In this way we

are making a Matrix Report).

7. Click refresh

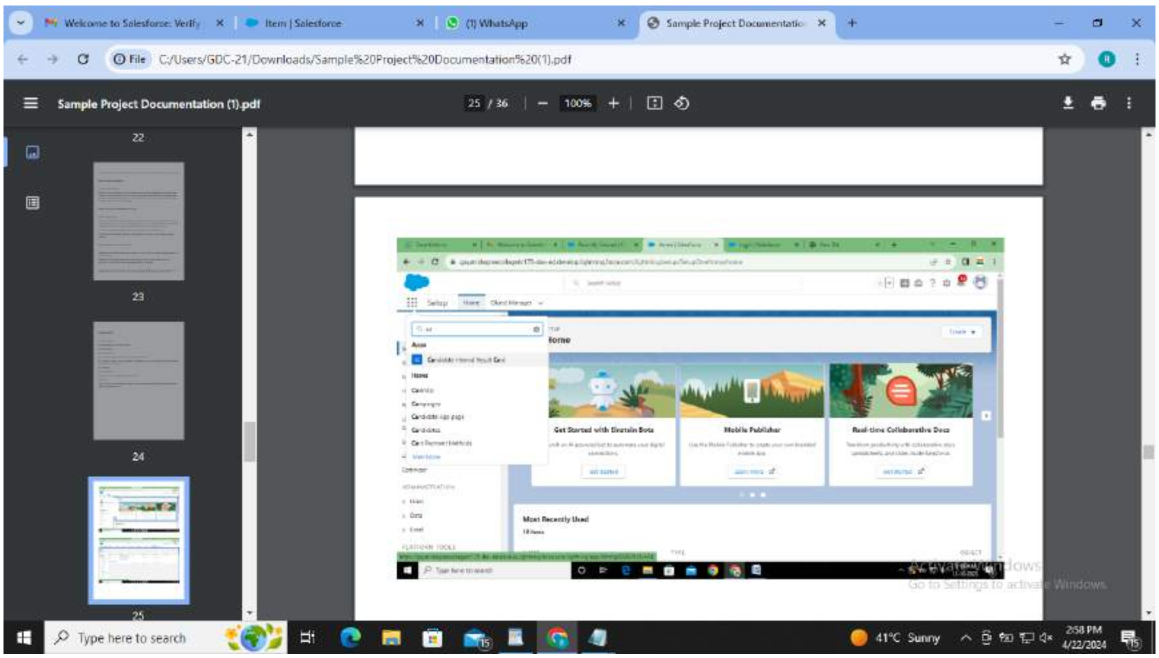
8. Click save and run

9. Give report name – Candidate Internal Result Report

10.Click Save

NOTE: In this report you can see your all record of the object you selected for reporting (What you Selects in

“Select a report type option”).



1 . On the report builder page, locate the "Fields" pane on the left-hand side.

2. Find the field for which you want to create a bucket field and drag it to the report preview section.

3. Click on the field in the report preview to open the field properties.

4. In the field properties, locate the "Summarize" option and click the drop-down arrow.

5. Select "Bucket Field" from the available options.

6. In the bucket field settings, define the buckets based on your requirements. You can specify the bucket

ranges, labels, and groupings.

7. Click "OK" or "Apply" to save the bucket field settings.

8. Customize the report layout and add any additional fields or filters as needed.

9. Once you are satisfied with the report setup, click "Save" to save the report

View Report

Go to the App Launcher present in the top left corner in the trailhead page.

• We will find many apps present in the app launcher, visit any app present in the app launcher.

• You will find the products tab present in the app page, click on the tab.

• Then click on NEW to insert a new record into the products object.

Milestone – 09: Dashboards

Dashboards let you curate data from reports using charts, tables,and metrics. If your colleagues need more

information, then they'reable to view your dashboard's data-supplying reports. Dashboard filters make it easy

for users to apply different data perspectives to asingle dashboard.

Create Dashboard

Go to the app ? click on the reports tab

1) Click New Report.

2) Click on All category and find “Items” object.

3) Click on start Report.

4) On the left panel, you can see Group Rows and Columns. Add the following items shown in the image below.

5) Click on save and you will see there a new window about asking the name of the report. Save the report with a name. Click Run.

Create A Dashboard On Translists Report

Go to the app ? click on the Dashboards tabs.

Click on New Dashboard.

Enter the Name of the dashboard and description(optional).

Upon clicking create, you will notice an empty dashboard. Click on New component.

Click on “+ Component”, and click on translists report.

6)Click on select and in the add

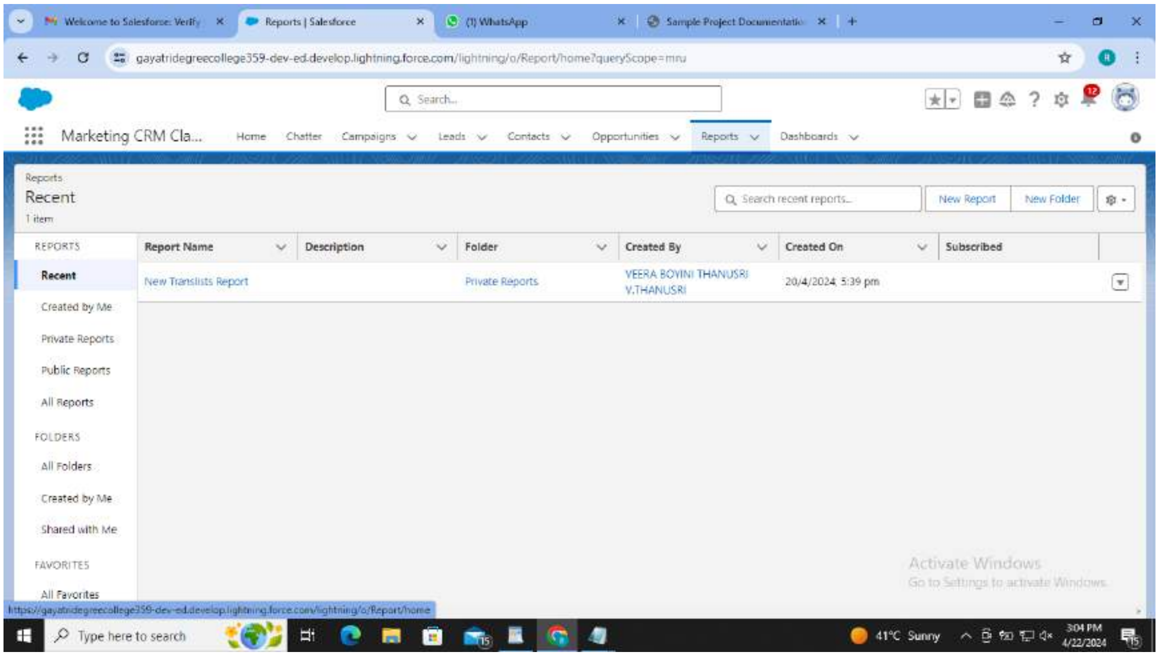
component section, select all the fields required for the dashboard. Click on add component and add display as pie chart view.

7) You will view the translists report on the dashboard page. Click on done and Save.

8)Add another component on translists reports, select Gauge representation and add the component.

9) Select the Measure as Record count(to maintain the number of transaction count) and select the checkboxes Show Percentages, Show Values and Show Ranges.

10)Add segment ranges as 0,10,30,50 and add the component.



View Dashboard

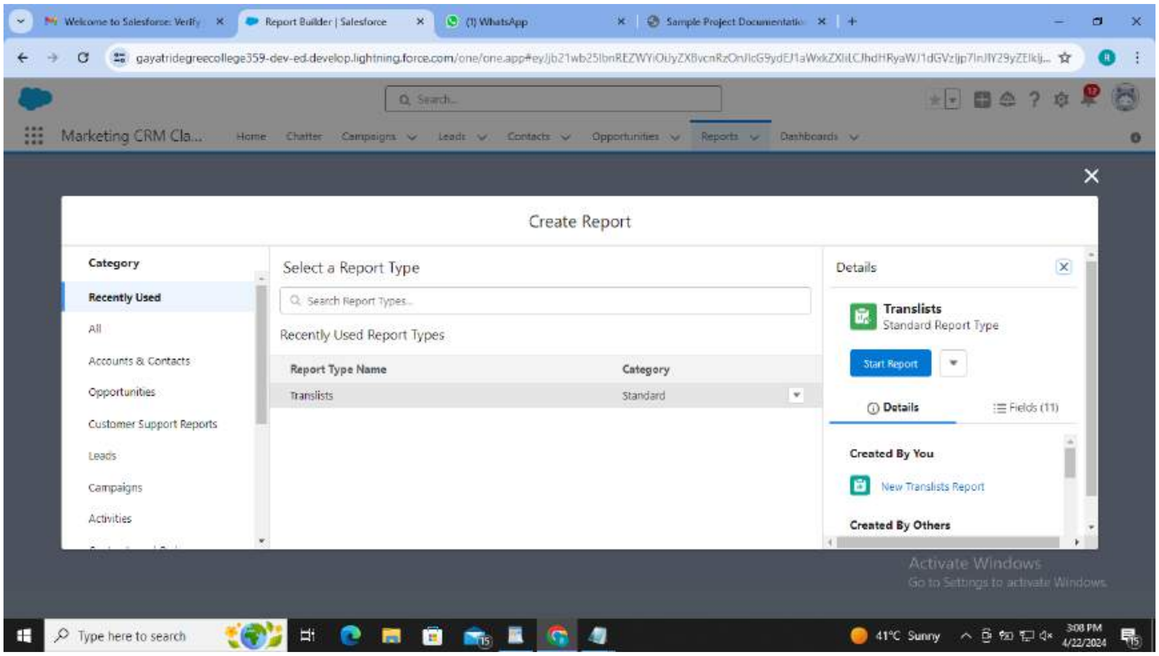
1)Click on new Dashboard.

2)Enter the name of the dashboard. 3)Upon clicking create, you will notice an empty dashboard. Click on New component.

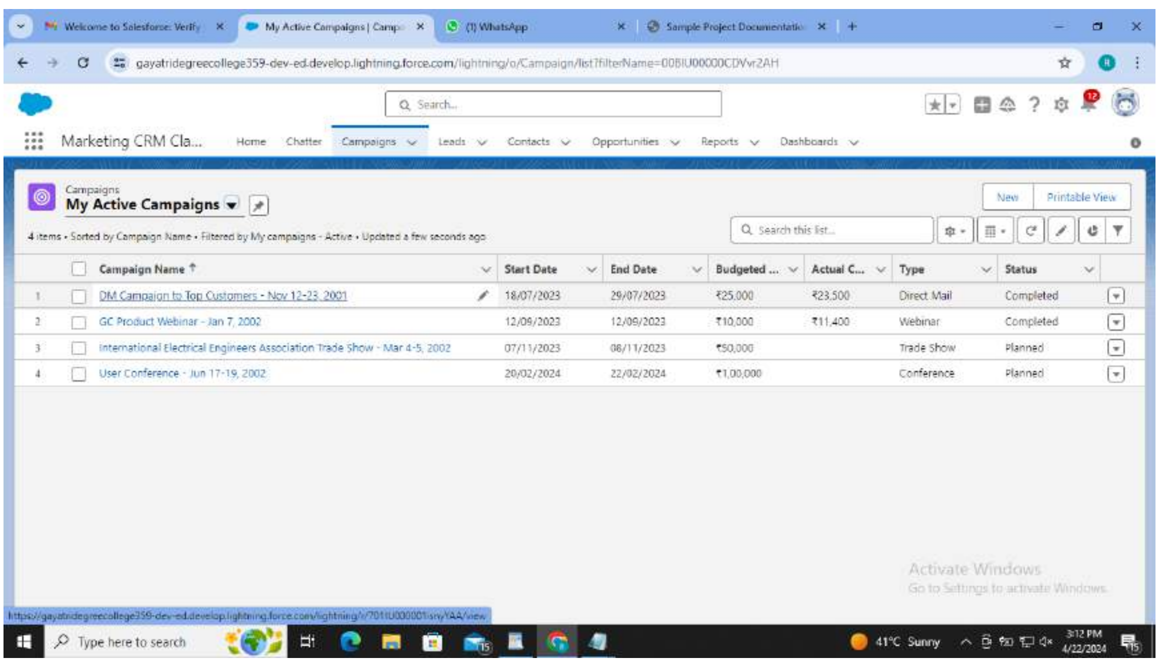
4) Click on "+ Component", and click on translists report.

5) Click on select and in the add component section, select all the fields required for the dashboard. Click on add component and add display as pie chart view.(if possible select dark mode for better experience).

6) Click on add. You can now see the pie chart dashboard of how many of those items are most sold and count of the items.



OUTPUT:



THE END