

# REPORT ON THE PROJECT

## Retail Management Application

### Using Salesforce

## Introduction:

### **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.

### **Overview -**

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.

**Purpose-**

To manage orders from retail stores and distributors, including tracking orders processing payments, and managing inventory levels. This can help field sales teams ensure that orders are fulfilled quickly and accurately and that inventory levels are maintained at optimal levels.

## **Certificate**

This is to certify that this is a Bonafide record of work done by the student of Computer Science and System Engineering B.Tech Degree 4<sup>th</sup> year during the year 2023 Submitted for the Industry Use Case Development project work held on 03.07.2023.

Submitted by

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**Smartinternz Team**

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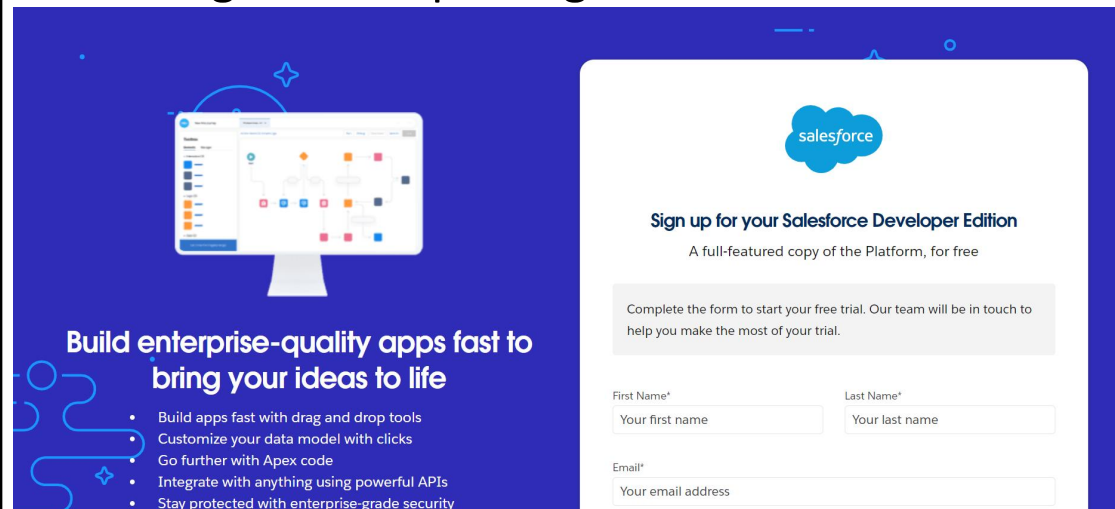
**5.APPLICATION**

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# Activity&Screenshot:

## 1. Creating a developer org in salesforce.



## 2. Creating Custom Objects.

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

1. Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
2. Custom Objects: Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

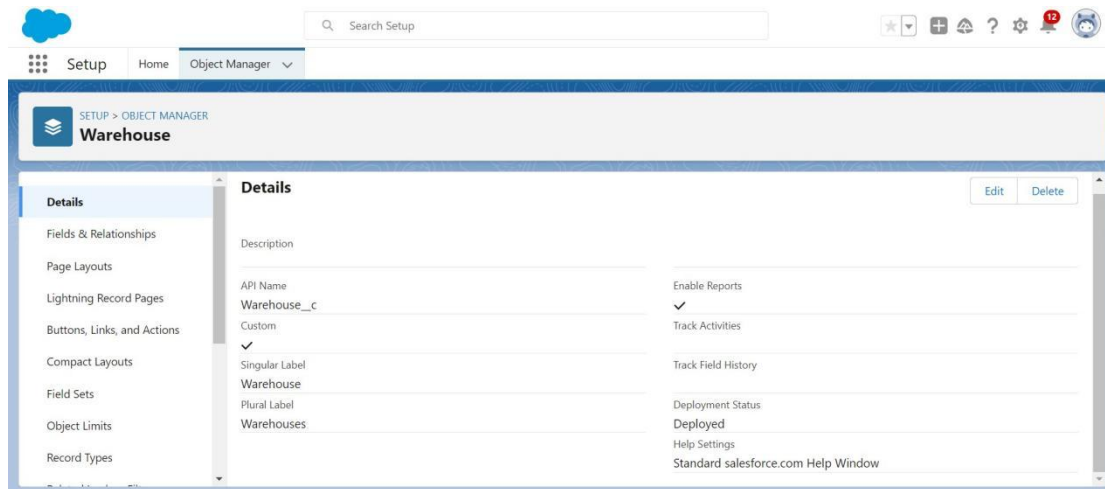
Objects involved in retail management are:

| Application | Object            | Description  |
|-------------|-------------------|--|
| Sales app   | Campaign          | We do promotions by using this object                |
|             | Lead              | We capture leads here                                |
|             | Account           | We capture customers data                            |
|             | Contact           | Employees data of customer                           |
|             | Opportunity       | SMB sales orders data                                |
|             | Product           | 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     |
| Service app | Case              | Historical problems of customers will be stored here |
|             | Account           | We captures customers data                           |

We need to create these objects -

1. Warehouse
2. Sales order
3. Dispatch/Tracking

1.

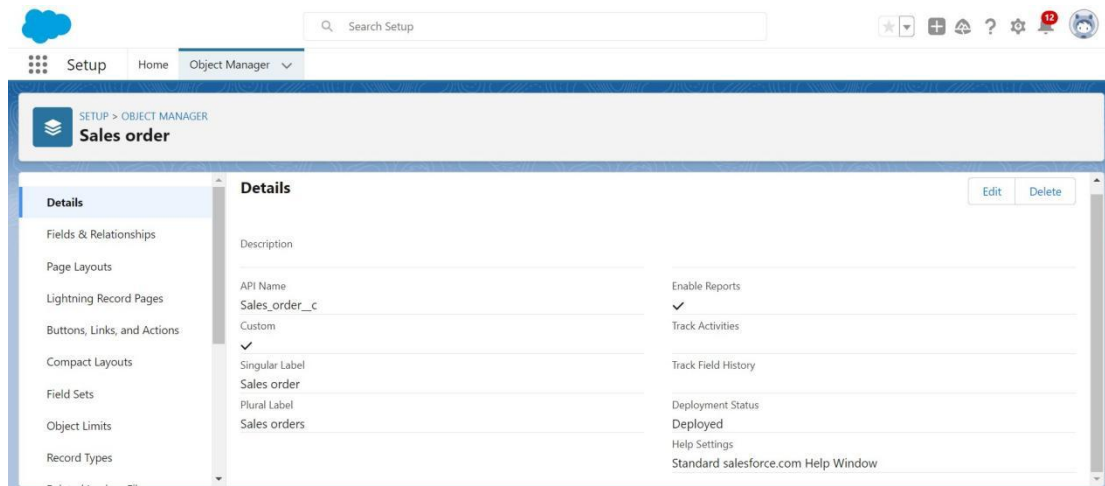


This screenshot shows the Salesforce Setup interface for the 'Warehouse' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, and Record Types. The main content area is titled 'Warehouse' and includes a 'Details' section with the following fields:

| Field               | Value                               |
|---------------------|-------------------------------------|
| Description         |                                     |
| API Name            | Warehouse__c                        |
| Custom              | ✓                                   |
| Singular Label      | Warehouse                           |
| Plural Label        | Warehouses                          |
| Enable Reports      | ✓                                   |
| Track Activities    |                                     |
| Track Field History |                                     |
| Deployment Status   | Deployed                            |
| Help Settings       | Standard salesforce.com Help Window |

Buttons for 'Edit' and 'Delete' are located in the top right corner of the details section.

2.

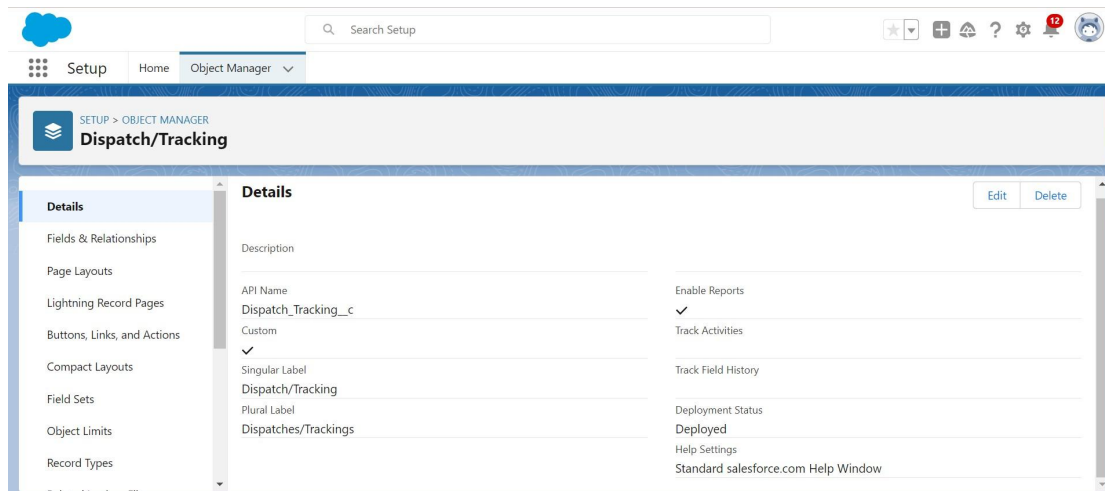


This screenshot shows the Salesforce Setup interface for the 'Sales order' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, and Record Types. The main content area is titled 'Sales order' and includes a 'Details' section with the following fields:

| Field               | Value                               |
|---------------------|-------------------------------------|
| Description         |                                     |
| API Name            | Sales_order__c                      |
| Custom              | ✓                                   |
| Singular Label      | Sales order                         |
| Plural Label        | Sales orders                        |
| Enable Reports      | ✓                                   |
| Track Activities    |                                     |
| Track Field History |                                     |
| Deployment Status   | Deployed                            |
| Help Settings       | Standard salesforce.com Help Window |

Buttons for 'Edit' and 'Delete' are located in the top right corner of the details section.

3.



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

| Field               | Value                               |
|---------------------|-------------------------------------|
| Description         |                                     |
| API Name            | Dispatch_Tracking__c                |
| Custom              | ✓                                   |
| Singular Label      | Dispatch/Tracking                   |
| Plural Label        | Dispatches/Trackings                |
| Enable Reports      | ✓                                   |
| Track Activities    |                                     |
| Track Field History |                                     |
| Deployment Status   | Deployed                            |
| Help Settings       | Standard salesforce.com Help Window |

Buttons for 'Edit' and 'Delete' are located in the top right corner of the details section.

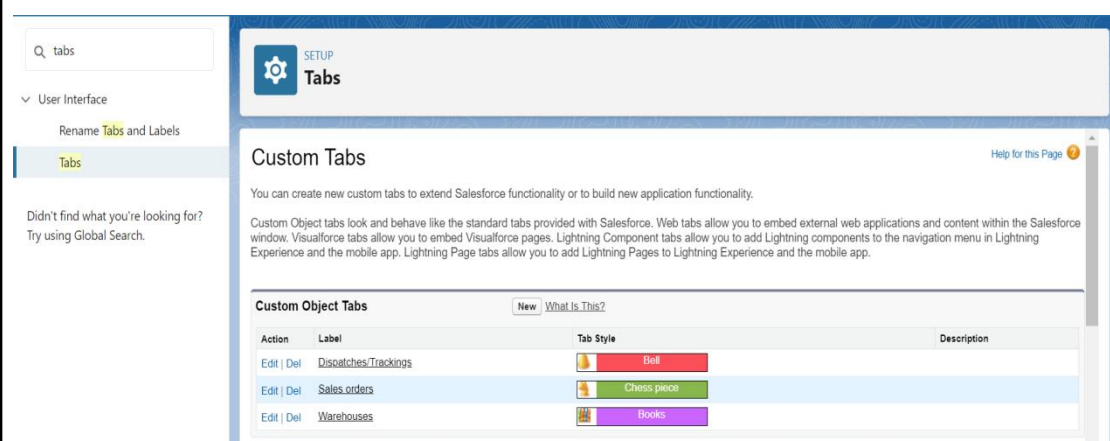
### 3. Creating a custom tab.

#### What Is A Tab?

Tabs in Salesforce help users view the information at a glance. It displays the data of objects and other web content in the application.

There are mainly 4 types of tabs:

1. Standard Object Tabs: Standard object tabs display data related to standard objects
2. Custom Object Tabs: Custom object tabs displays data related to custom objects.
3. Web Tabs: Web Tabs display any external Web-based application or Web page in a Salesforce tabs.
4. Visualforce Tabs: Visualforce Tabs display data from a Visualforce Page.



The screenshot shows the Salesforce Setup interface for Custom Tabs. On the left, a sidebar contains a search bar with 'tabs' entered, a 'User Interface' section with 'Rename Tabs and Labels' and 'Tabs' links, and a message: 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Custom Tabs' with a 'Help for this Page' link. Below the title, a text block explains: 'You can create new custom tabs to extend Salesforce functionality or to build new application functionality. Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.' Below this is a table titled 'Custom Object Tabs' with columns for 'Action', 'Label', 'Tab Style', and 'Description'. The table lists three tabs: 'Dispatches/Trackings' with a 'Bell' style, 'Sales orders' with a 'Chess piece' style, and 'Warehouses' with a 'Books' style. Each row has 'Edit' and 'Del' links.

| Action                                     | Label                | Tab Style   | Description |
|--|----------------------|-------------|-------------|
| <a href="#">Edit</a>   <a href="#">Del</a> | Dispatches/Trackings | Bell        |             |
| <a href="#">Edit</a>   <a href="#">Del</a> | Sales orders         | Chess piece |             |
| <a href="#">Edit</a>   <a href="#">Del</a> | Warehouses           | Books       |             |

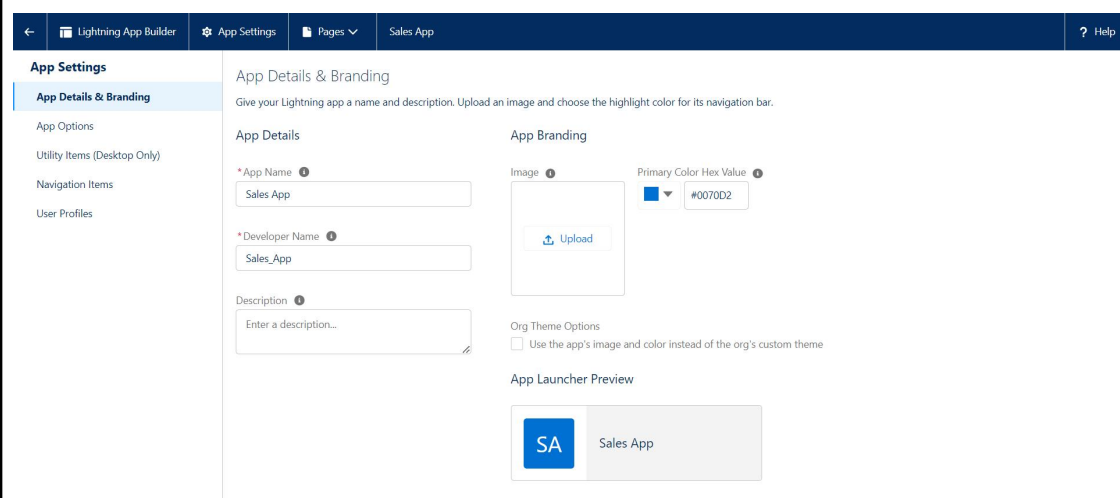


## 4. Creating The Sales App

### What Is An App ?

**Custom Apps:** Custom apps are created according to need of user. Custom Apps are made by using standard and custom tabs together.

**Note: Logos for Custom Apps can be changed.**



The screenshot shows the 'App Settings' page in the Lightning App Builder. The left sidebar lists 'App Settings' with sub-items: 'App Details & Branding' (selected), 'App Options', 'Utility Items (Desktop Only)', 'Navigation Items', and 'User Profiles'. The main content area is titled 'App Details & Branding' and includes instructions: 'Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.' It is divided into two columns: 'App Details' and 'App Branding'. Under 'App Details', there are input fields for '\*App Name' (filled with 'Sales App'), '\*Developer Name' (filled with 'Sales\_App'), and 'Description' (with a placeholder 'Enter a description...'). Under 'App Branding', there is an 'Image' upload section with an 'Upload' button, and a 'Primary Color Hex Value' field (filled with '#0070D2'). Below these is the 'Org Theme Options' section with a checkbox 'Use the app's image and color instead of the org's custom theme' which is currently unchecked. At the bottom, the 'App Launcher Preview' shows a blue square icon with 'SA' and a label 'Sales App'.

## 5. Creating Fields & Relationships

### Fields And Relationship

**Fields** - Fields store data values that are required for a particular object in a record.

An object relationship in Salesforce is a **two-way association between two objects**. Relationships are created by creating custom relationship fields on an object. This is done so that when users view records, they can also see and access related data.

These are fields and their data types we need to create make them one by one –

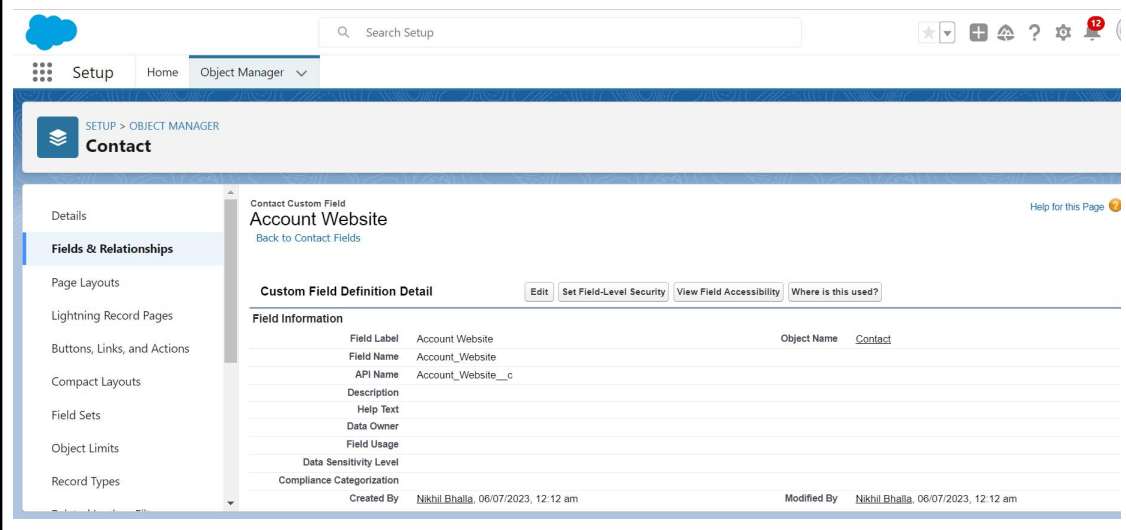
| Object            | Fields                    | Datatype                            |
|-------------------|---------------------------|-------------------------------------|
| Contact           | Account website           | Lookup (Cross Object Formula field) |
| Warehouse         | Address                   | Text Area                           |
|                   | Location                  | Text (50)                           |
| Sales Order       | Status                    | Picklist                            |
|                   | Customer                  | Lookup (Account)                    |
|                   | Contact                   | Lookup (contact)                    |
|                   | Order date                | Date                                |
| Dispatch/Tracking | Dispatched                | Checkbox                            |
|                   | Tracking ID               | Text                                |
|                   | Sales Order               | Master Detail (Sales Order)         |
|                   | Expected date of delivery | Date                                |

## Creating a Cross-Object Formula Field

A cross-object formula field is basically a formula field.

A cross-object formula can reference merge fields from a master (“parent”) object if an object is on the detail side of a master-detail relationship.

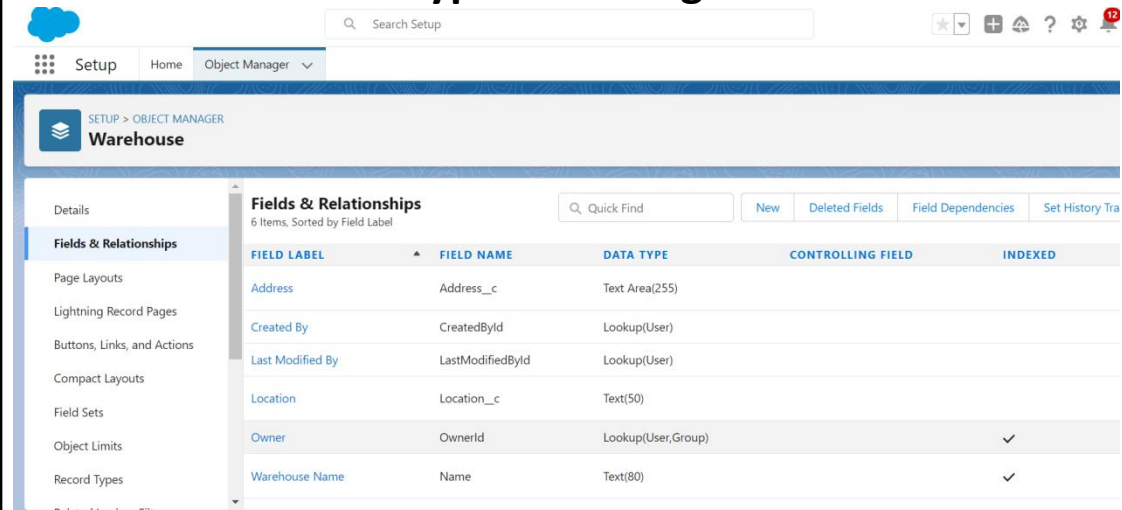
A cross-object formula works with Lookup relationships as well as in Master detail relationship. You can reference fields from objects that are up to 10 relationships away.



The screenshot shows the Salesforce Setup interface. The top navigation bar includes the Setup icon, a search bar, and various utility icons. The main navigation menu on the left lists options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, and Record Types. The main content area is titled 'Contact Custom Field' and 'Account Website'. It includes a 'Back to Contact Fields' link and a 'Custom Field Definition Detail' section with tabs for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' table shows the following details:

| Field Label               | Account Website                     | Object Name | Contact                             |
|---------------------------|-------------------------------------|-------------|-------------------------------------|
| Field Name                | Account_Website                     |             |                                     |
| API Name                  | Account_Website__c                  |             |                                     |
| Description               |                                     |             |                                     |
| Help Text                 |                                     |             |                                     |
| Data Owner                |                                     |             |                                     |
| Field Usage               |                                     |             |                                     |
| Data Sensitivity Level    |                                     |             |                                     |
| Compliance Categorization |                                     |             |                                     |
| Created By                | Nikhil Bhalla, 06/07/2023, 12:12 am | Modified By | Nikhil Bhalla, 06/07/2023, 12:12 am |

Similarly creating fields for Warehouse object- Address, Location select datatype according table.



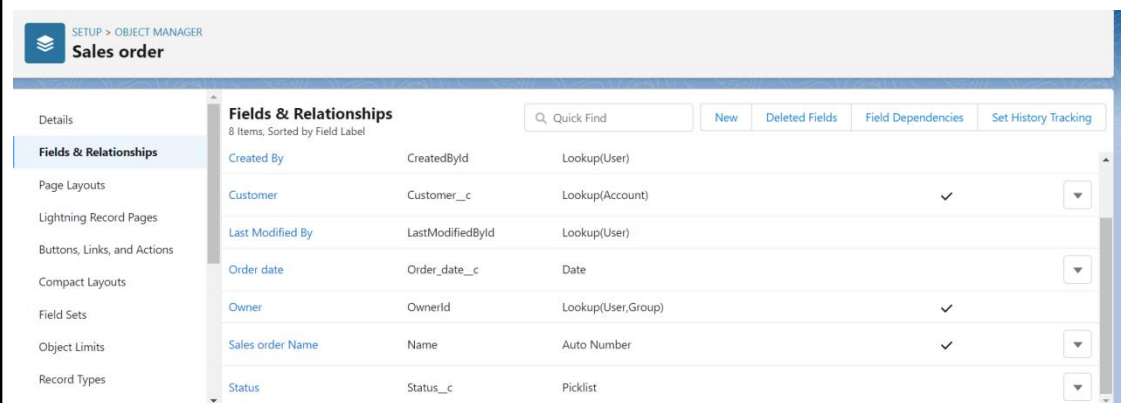
Setup > OBJECT MANAGER  
Warehouse

Details

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

| FIELD LABEL      | FIELD NAME       | DATA TYPE          | CONTROLLING FIELD | INDEXED |
|------------------|------------------|--------------------|-------------------|---------|
| Address          | Address__c       | Text Area(255)     |                   |         |
| Created By       | CreatedById      | Lookup(User)       |                   |         |
| Last Modified By | LastModifiedById | Lookup(User)       |                   |         |
| Location         | Location__c      | Text(50)           |                   |         |
| Owner            | OwnerId          | Lookup(User,Group) |                   | ✓       |
| Warehouse Name   | Name             | Text(80)           |                   | ✓       |

Create A Pick-List Field On Sales Order ,Creating A Lookup Relationship On Sales Order Object With Account Object, Create A Lookup Relationship On Sales Order Object With Contact Object With Use Of Lookup Filter & Create Order Date Field On Sales Order



Setup > OBJECT MANAGER  
Sales order

Details

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

| FIELD LABEL      | FIELD NAME       | DATA TYPE          | CONTROLLING FIELD | INDEXED |
|------------------|------------------|--------------------|-------------------|---------|
| Created By       | CreatedById      | Lookup(User)       |                   |         |
| Customer         | Customer__c      | Lookup(Account)    | ✓                 |         |
| Last Modified By | LastModifiedById | Lookup(User)       |                   |         |
| Order date       | Order_date__c    | Date               |                   |         |
| Owner            | OwnerId          | Lookup(User,Group) | ✓                 |         |
| Sales order Name | Name             | Auto Number        | ✓                 |         |
| Status           | Status__c        | Picklist           |                   |         |

## Creation Of Fields For The Dispatch/Tracking Object & Create A Master-Detail Relationship On Dispatch/Delivery Object

The screenshot shows the 'Fields & Relationships' page for the 'Dispatch/Tracking' object in Salesforce Setup. The left sidebar lists various setup options, with 'Fields & Relationships' selected. The main area displays a table of fields with columns for Name, Field Label, and Data Type. The fields listed are:

| Field Name                | Field Label                  | Data Type                  | Relationship |
|---------------------------|------------------------------|----------------------------|--------------|
| Dispatch/Tracking Name    | Name                         | Text(80)                   |              |
| Dispatched                | Dispatched__c                | Checkbox                   |              |
| Expected date of delivery | Expected_date_of_delivery__c | Date                       |              |
| Last Modified By          | LastModifiedById             | Lookup(User)               |              |
| Sales order               | Sales_order__c               | Master-Detail(Sales order) | ✓            |
| Tracking ID               | Tracking_ID__c               | Text(40)                   |              |

## 6. Creating a User

### 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.

The screenshot shows the 'Users' page in Salesforce Setup. The left sidebar lists various setup options, with 'Users' selected. The main area displays the 'User Detail' for a user named 'manager'. The details include:

| Field                     | Value  |
|---------------------------|--|
| Name                      | manager  |
| Alias                     | mana   |
| Email                     | 200nikhithalla@gmail.com                       |
| Username                  | nikhithalla@gmail.com                          |
| Nickname                  | User16885830706575351940                       |
| Title                     |  |
| Company                   |  |
| Department                |  |
| Division                  |  |
| Address                   |  |
| Time Zone                 | (GMT+05:30) India Standard Time (Asia/Kolkata) |
| Locale                    | English (India)                                |
| Language                  | English  |
| Delegated Approver        |  |
| Role                      | Salesforce                                     |
| User License              | Standard User                                  |
| Profile                   | Standard User                                  |
| Active                    | ✓  |
| Marketing User            | <input type="checkbox"/>                       |
| Offline User              | <input type="checkbox"/>                       |
| Knowledge User            | <input type="checkbox"/>                       |
| Flow User                 | <input type="checkbox"/>                       |
| Service Cloud User        | <input type="checkbox"/>                       |
| Site.com Contributor User | <input type="checkbox"/>                       |
| Site.com Publisher User   | <input type="checkbox"/>                       |
| WDC User                  | <input type="checkbox"/>                       |
| Mobile Push Registrations | <a href="#">View</a>                           |
| Data.com User Type        | <a href="#">i</a>                              |

## 7. Creating Validation rules

### 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.

The screenshot shows the 'Object Manager' interface in Salesforce. The main heading is 'Account Validation Rule'. Below it, there's a 'Validation Rule Detail' section with fields for Rule Name, Error Condition Formula, Error Message, Description, Created By, and Modified By. The Rule Name is 'Phone\_Number\_has\_international\_format'. The Error Condition Formula is 'LEFT(Phone, 1) <> "+"'. The Error Message is 'Phone number must begin with + (country code)'. The Error Location is 'Phone'. The Description is empty. The Created By is 'Nikhil Bhalla, 06/07/2023, 12:57 am'. The Modified By is 'Nikhil Bhalla, 06/07/2023, 12:57 am'. There are 'Edit' and 'Clone' buttons for both the rule and the error message.

| Validation Rule Detail  |   |
|-------------------------|---|
| Rule Name               | Phone_Number_has_international_format         |
| Error Condition Formula | LEFT(Phone, 1) <> "+"                         |
| Error Message           | Phone number must begin with + (country code) |
| Description             |   |
| Created By              | Nikhil Bhalla, 06/07/2023, 12:57 am           |
| Modified By             | Nikhil Bhalla, 06/07/2023, 12:57 am           |

## 8.1 User Adoption

### Creating & viewing a Record (Sales Order)

The screenshot shows the 'Sales App' interface in Salesforce. The main heading is 'Sales orders'. Below it, there's a 'Recently Viewed' section with a search bar and a list of records. The list contains one record: 'Sales order Name' with ID 'SO-0001'. There are 'New', 'Import', and 'Change Owner' buttons at the top right.

| Sales orders                       |                  |
|------------------------------------|------------------|
| Recently Viewed                    |                  |
| 1 item • Updated a few seconds ago |                  |
| <input type="checkbox"/>           | Sales order Name |
| 1                                  | SO-0001          |

### Deleting a Record (Sales Order)

The screenshot shows the 'Sales App' interface in Salesforce. The main heading is 'Sales orders'. Below it, there's a 'Recently Viewed' section with a search bar and a list of records. The list is empty. A green confirmation message is displayed at the top: 'Sales order "SO-0001" was deleted. Undo'. There are 'New', 'Import', and 'Change Owner' buttons at the top right.

| Sales orders  |  |
|---|--|
| Recently Viewed   |  |
| 0 items • Updated a few seconds ago                                     |  |
| You haven't viewed any Sales orders recently. Try switching list views. |  |

## 9. Creating Report

## Reports

Reports in Salesforce is a list of records that meet a particular criterion which gives an answer to 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:

1. 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 be used in Dashboards. They are mainly used to generate a simple list or a list with a grand total.

2. Summary Reports:

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

3. 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.

4. Joined Reports:

These types of reports let us create different views of data from multiple report types. The data is joined reports are organized in blocks. Each block acts as a subreport with its own fields, columns, sorting, and filtering. They are used to group and show data from multiple report types in different views.

Report types:

Report type determines which set of records will be available in a report. Every report is based on a particular report type. The report type is selected first when we create a report. Every report type has a primary object and one or more related objects. All these objects must be linked together either directly or indirectly.

A report type cannot include more than 4 objects.

Once a report is created its report type cannot be changed.

There are 2 types of report types:

1. Standard Report Types:

Standard Report Types are automatically included with standard objects and also with custom objects where “Allow Reports” is checked.

Standard report types cannot be customized and automatically include standard and custom fields for each object within the report type. Standard report types get created when an object is created, also when a relationship is created.

Note: Standard report types always have inner joins.

2. Custom Report Types:

Custom report types are reporting templates created to streamline the reporting process. Custom Reports are created by an administrator or User with “Manage Custom Report Types” permission. Custom report types are created when standard report types cannot specify which records will be available on reports.

In custom report types we can specify objects which will be available in a particular report. The primary object must have a relationship with other objects present in a report type either directly or indirectly.

There are 3 types of access levels of folders:

1. Viewer:

With this access level, users can see the data in a report but cannot make any changes except cloning it into a new report.

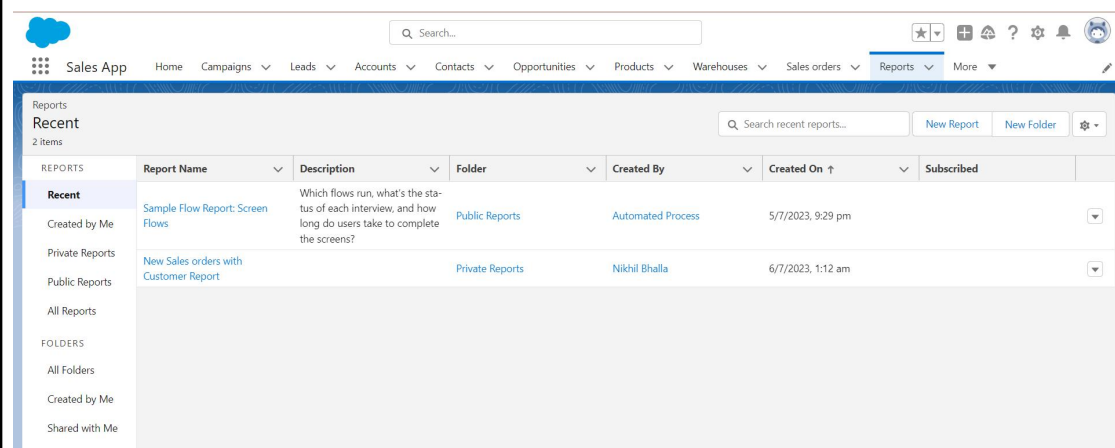
2. Editor:

With this access level, users can view and modify the reports it contains and can also move them to/from any other folders they have access level as Editor or Manager.

3. Manager:

With this access level, users can do everything Viewers & Editors can do, plus they can also control other user's access levels to this folder. Also, users with Manager Access levels can delete the report.

From this milestone we are going to import the data and create the reports and dashboards for datavisualization in the application



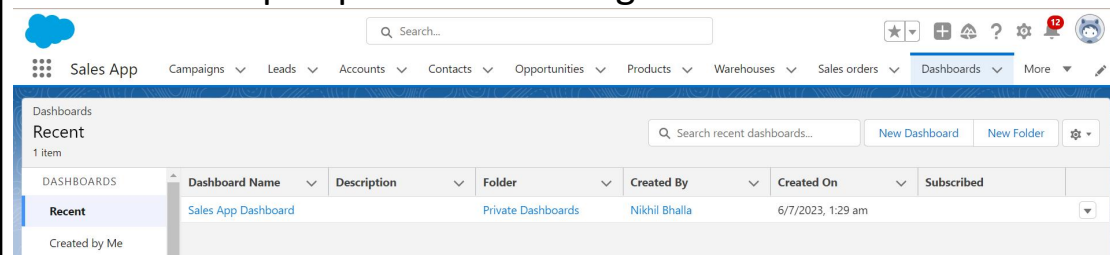
## 10. Creating Dashboard

### Dashboards

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



then they're able to view your dashboard's data-supplying reports. Dashboard filters make it easy for users to apply different data perspectives to a single dashboard.

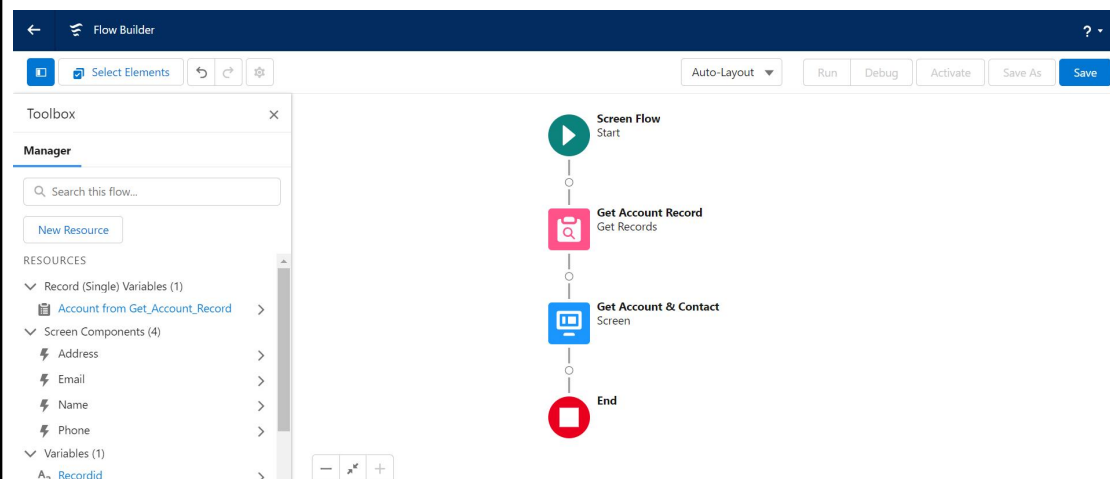


## 11. Creating different types of flows

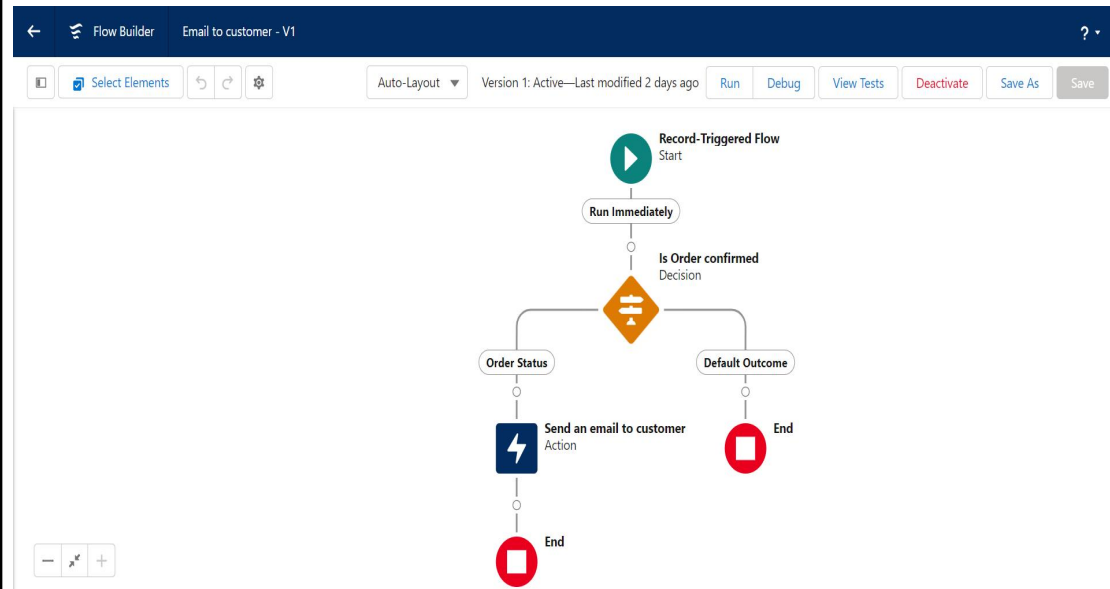
### Flows

Flows are an automation tool provided by Salesforce which can be used to perform various tasks like, Sending an Email, Posting a chatter, Sending custom Notifications &, etc. Flow is the most powerful automation tool provided by Salesforce. It can be trigger for record insert, update and record delete and it can be run for both after and before events.

### To Create Lightning Home Page



## To Send An Email Alert To The Customer Once Order Is Confirmed creating a Record Trigger Flow



## 12.1 Trigger On Account To Prevent Duplicate Name

### Triggers

A Trigger is a segment of Apex code which executes before or after inserting or modifying a Salesforce record based on the condition provided. There are different types of triggers based on the action going to be performed.

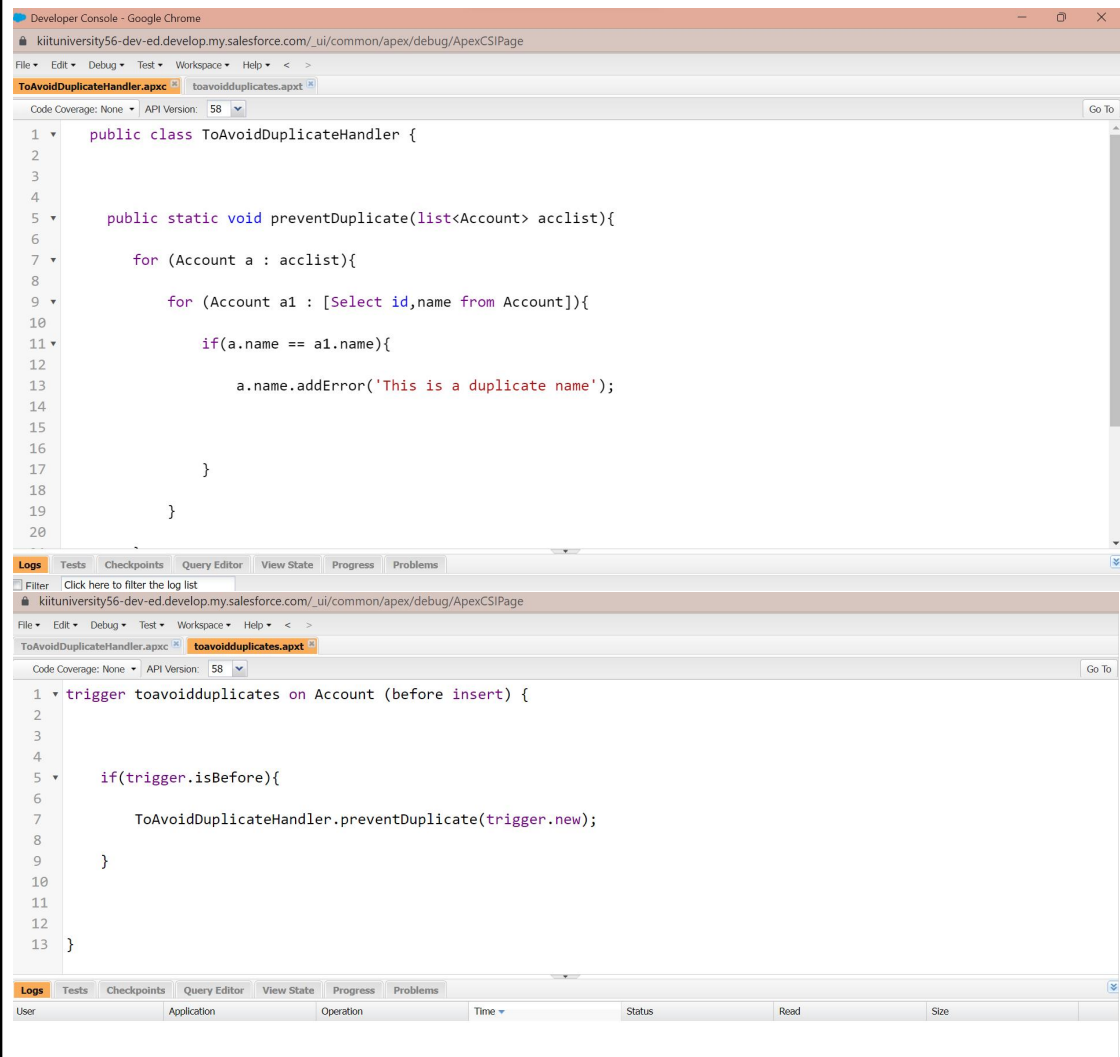
They are Before Triggers and After Triggers. Triggers allow modification of another record of the same type or different type.

There are two different types of Apex triggers within Salesforce:

**“Before” Apex Triggers.** These are used to update or validate the value in a record before you save it to your

Salesforce database.

**“After” Apex Triggers.** These are used to access the values contained within a record and use that value to make changes to other records in your Salesforce database. Unlike “Before” triggers, “After” triggers are read-only.



The screenshot displays the Salesforce Developer Console interface. The top pane shows the Apex class `ToAvoidDuplicateHandler` with a static method `preventDuplicate` that iterates through a list of accounts and checks for duplicates. The bottom pane shows a before insert trigger `toavoidduplicates` that calls the `preventDuplicate` method. The interface includes a menu bar, a toolbar, and a status bar.

```
public class ToAvoidDuplicateHandler {  
  
    public static void preventDuplicate(list<Account> acclist){  
  
        for (Account a : acclist){  
  
            for (Account a1 : [Select id,name from Account]){  
  
                if(a.name == a1.name){  
  
                    a.name.addError('This is a duplicate name');  
  
                }  
  
            }  
  
        }  
  
    }  
  
}
```

```
trigger toavoidduplicates on Account (before insert) {  
  
    if(trigger.isBefore){  
  
        ToAvoidDuplicateHandler.preventDuplicate(trigger.new);  
  
    }  
  
}
```

## Advantages of the project:

- Trustworthy reporting.
- Dashboards that visually showcase data.
- Improved messaging with automation.
- Proactive service.
- Efficiency enhanced by automation.
- Simplified collaboration.
- Better customer retention.

## **APPLICATIONS:**

-This article is for small business owners and marketers who want to learn about the benefits of CRM software for small businesses.

-CRM software is used to gather customer interactions in one central place to improve customer experience and satisfaction.

-CRM is one of the world's fastest-growing industries, expected to grow at a rate of 14% between 2021 and 2027.

-The benefits of CRM include better customer retention, increased sales and detailed analytics.

## **CONCLUSION:**

**The project is completed successfully as per the given topic requirement. This will facilitate the small venders go for online business and simplification of the business process.** In depth analysis of the current system was done. Information gathering tools such as interviews, observation and questionnaires were used to understand the current system and identify requirements. Context diagrams, and data flow diagrams were used to analysis the processes of the current system. A use case diagram was used to determine the system functional requirements of the proposed system. System requirements and user requirements will be used to determine more detailed specifications of the functionalities of the system and how the system operates.

## **FUTURE WORKS**

-This will facilitate the small business venders go for

online business and simplification of the business process. This will be upgraded with more features and option in the future so that the retail management will have more business growth and hence profits.

-It will be further upgraded for online delivery access and similar methods like Internet of Things.

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