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 4th 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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MENTOR

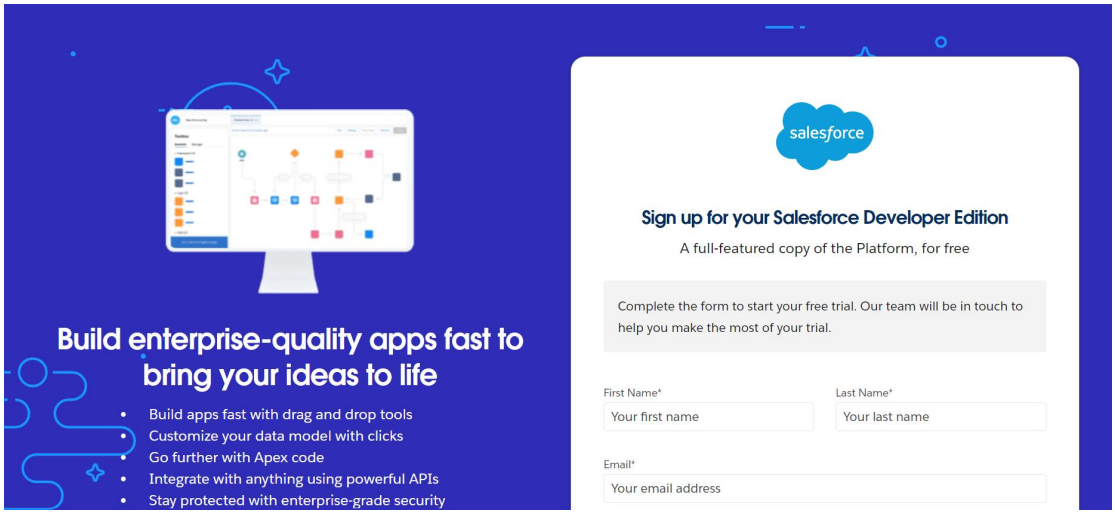
Smartinternz Team

Index

CONTENTS :

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	Obje -ct	Descr iption
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/Tracki ng	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

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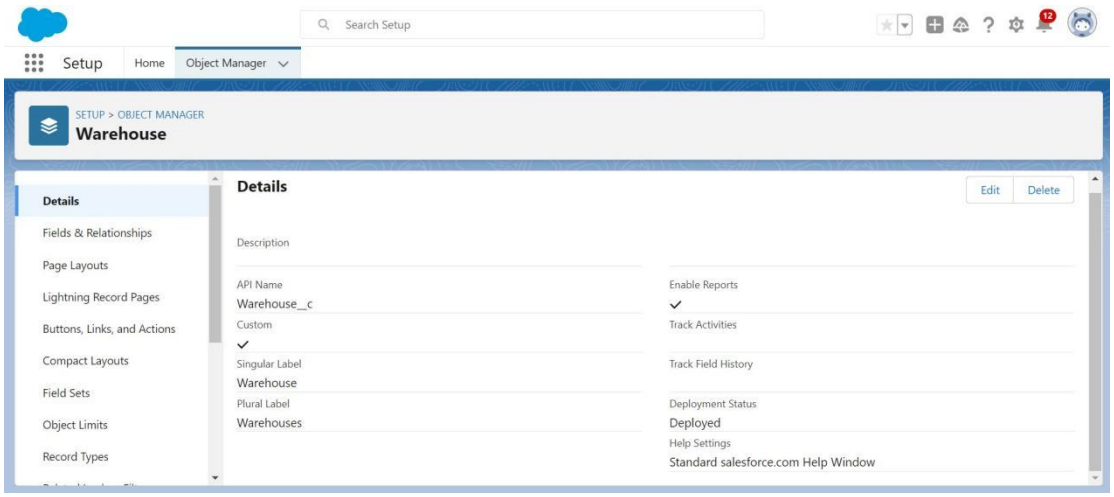
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Home
Object Manager
SETUP > OBJECT MANAGER
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Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Details
Edit
Delete
Description
API Name
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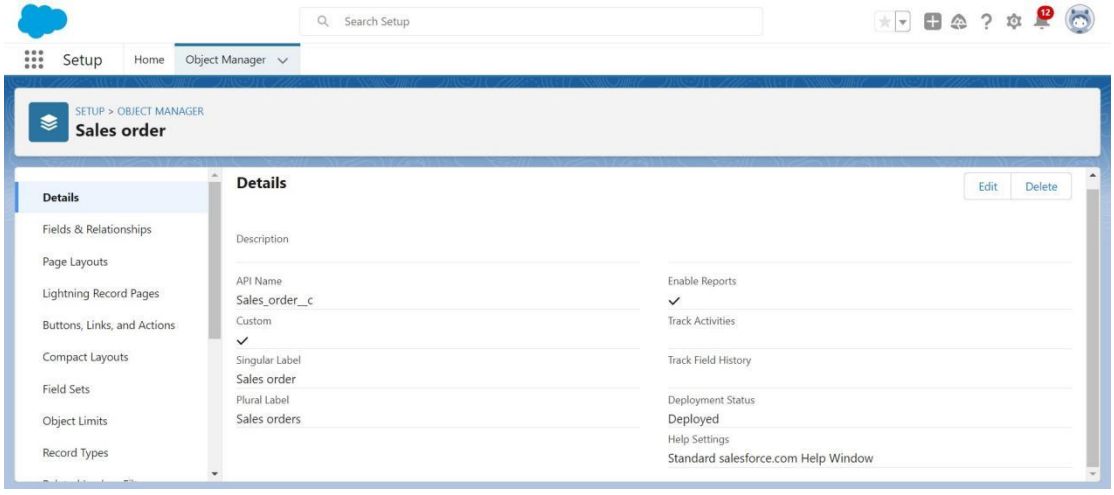
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Buttons, Links, and Actions
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Field Sets
Object Limits
Record Types
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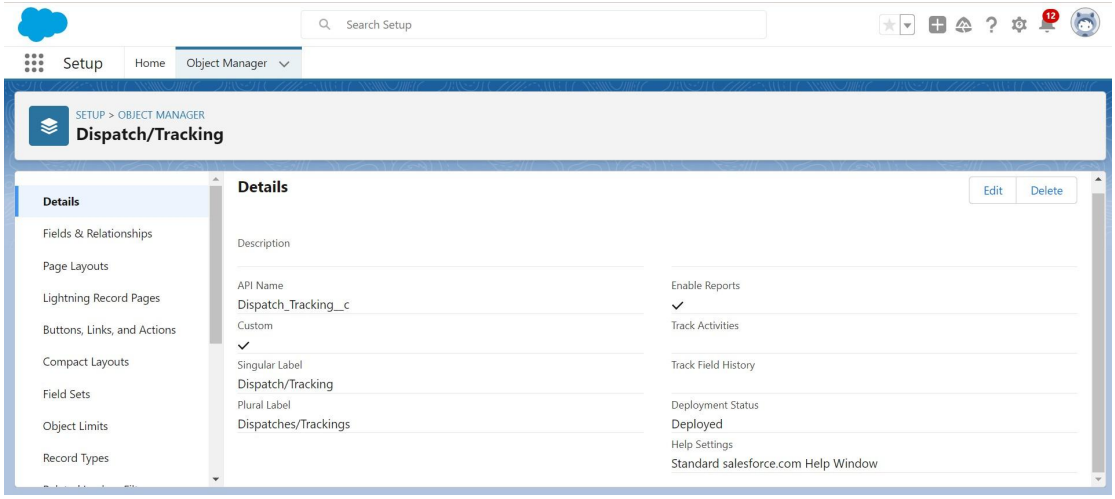
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Home
Object Manager
SETUP > OBJECT MANAGER
Dispatch/Tracking
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Details
Edit
Delete
Description
API Name
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

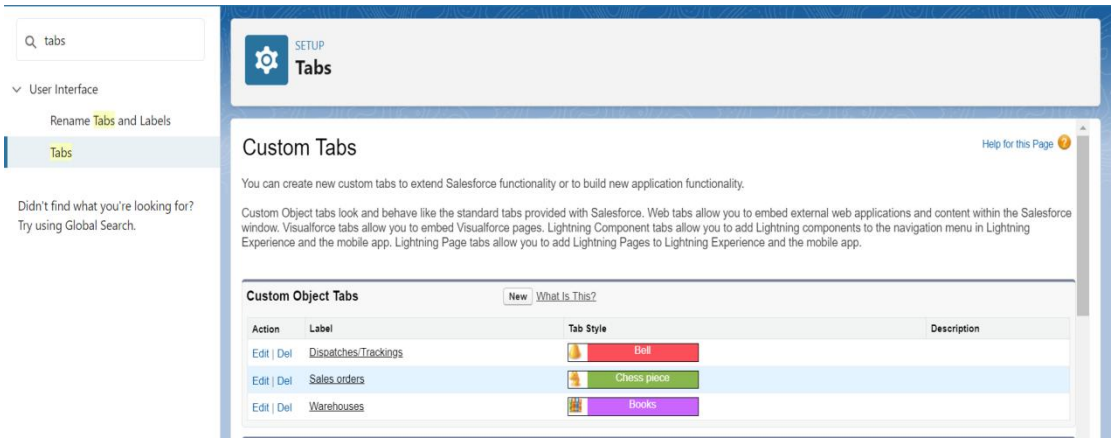
3.Creating a custom tab.

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:

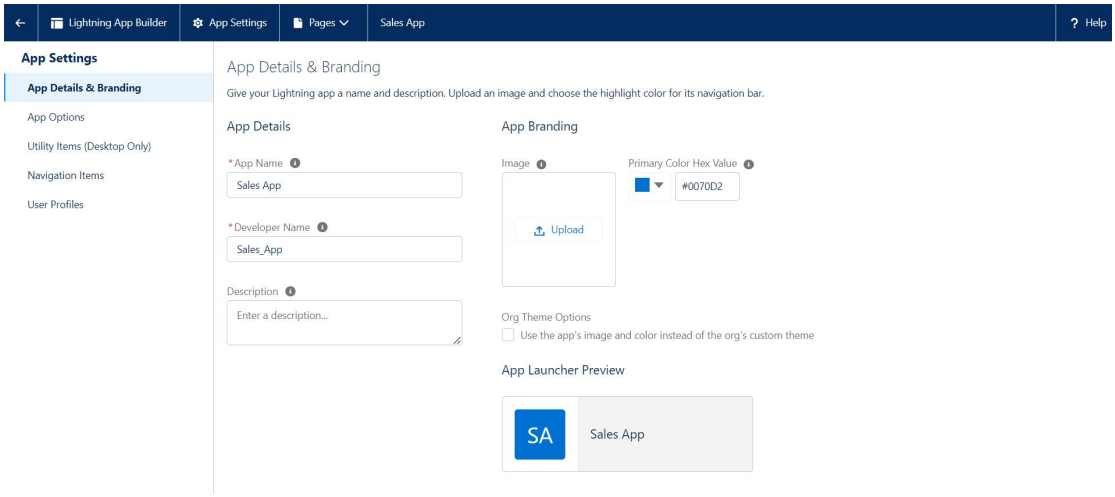
1. Standard Object Tabs: Standard object tabs display data related to standard objects
2. Custom Object Tabs: Custom object tabs displays data related to custom objects.
3. Web Tabs: Web Tabs display any external Web-based application or Web page in a Salesforce tabs.
4. Visualforce Tabs: Visualforce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



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.



5.Creating Fields & Relationships

Fields And Relationship

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

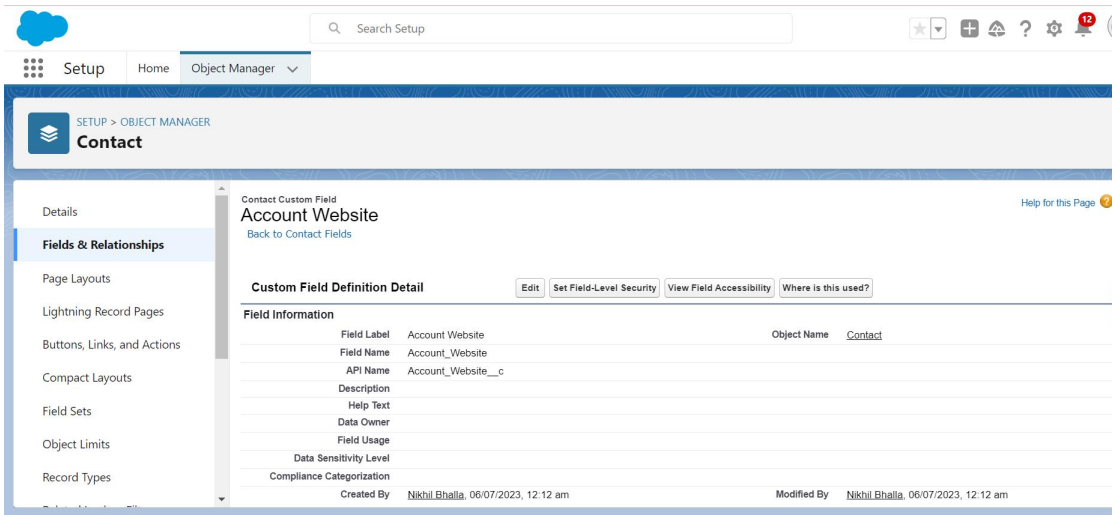
An object relationship in Salesforce is **a two-way association between two objects.** Relationships are created by creating custom relationship fields on an object. This is done so that when users view records, they can also see and access related data.

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

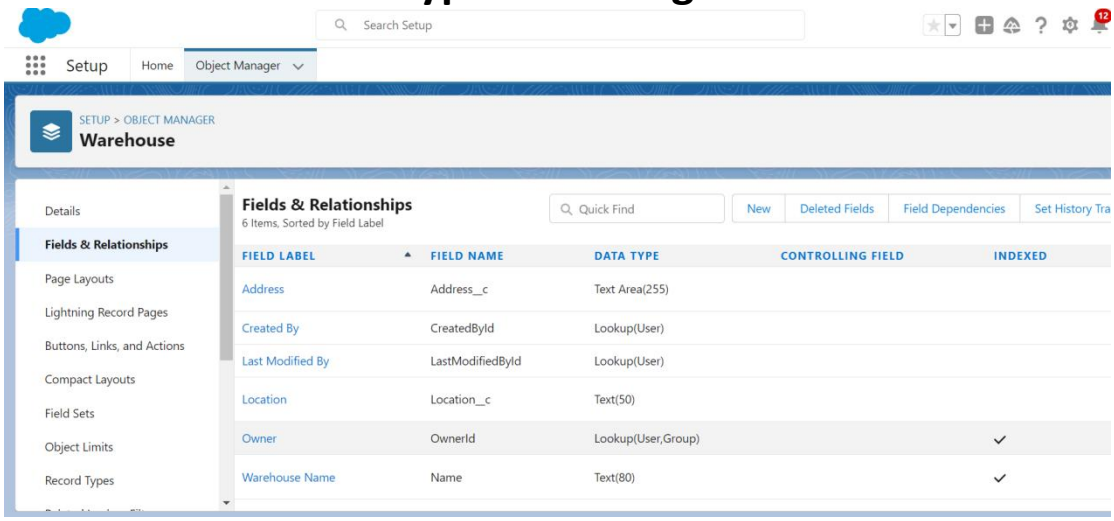
Object	Fields	Datatype
Contact	Account website	Lookup (Cross Object Formula field)
Warehouse	Address	Text Area
	Location	Text (50)
Sales Order	Status	Picklist
	Customer	Lookup (Account)
	Contact	Lookup (contact)
	Order date	Date
Dispatch/Tracking	Dispatched	Checkbox
	Tracking ID	Text
	Sales Order	Master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

Creating a Cross-Object Formula Field

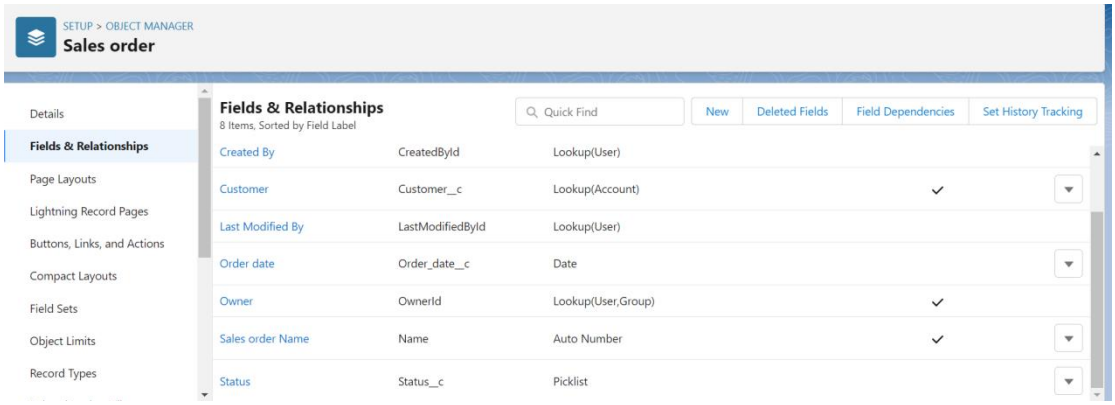
A cross-object formula field is basically a formula field.
A cross-object formula can reference merge fields from a master (“parent”) object if an object is on the detail side of a master-detail relationship.
A cross-object formula works with Lookup relationships as well as in Master detail relationship. You can reference fields from objects that are up to 10 relationships away.



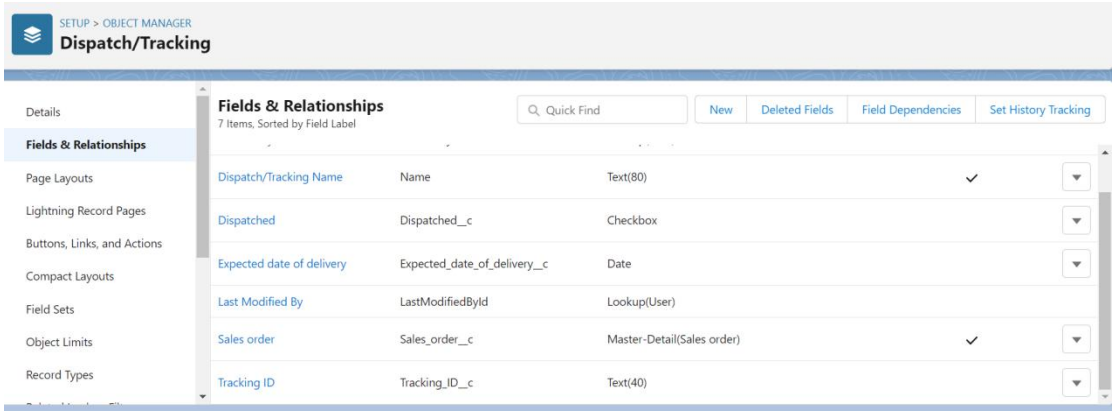
Similarly creating fields for Warehouse object- Address, Location select datatype according table.



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



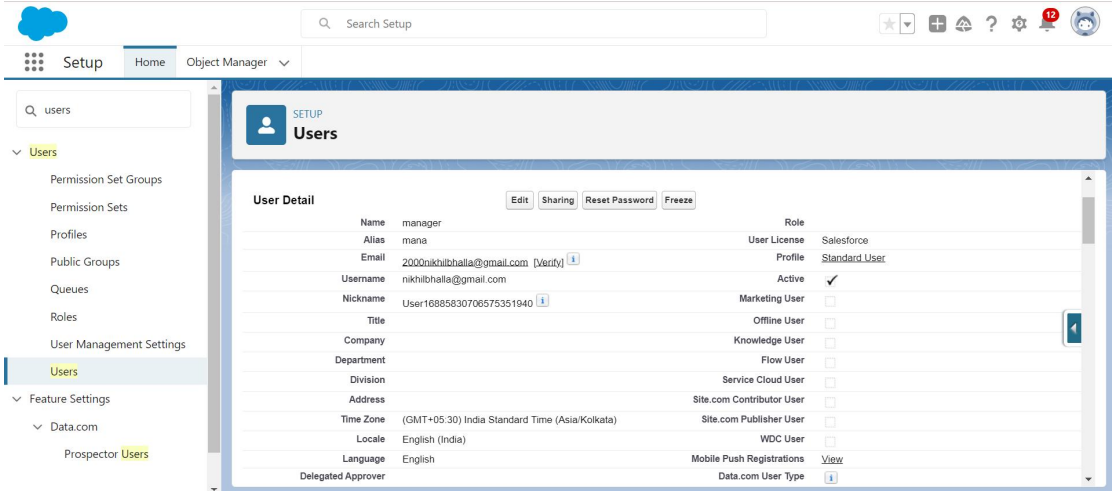
Creation Of Fields For The Dispatch/Tracking Object & Create A Master-Detail Relationship On Dispatch/Delivery Object



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.

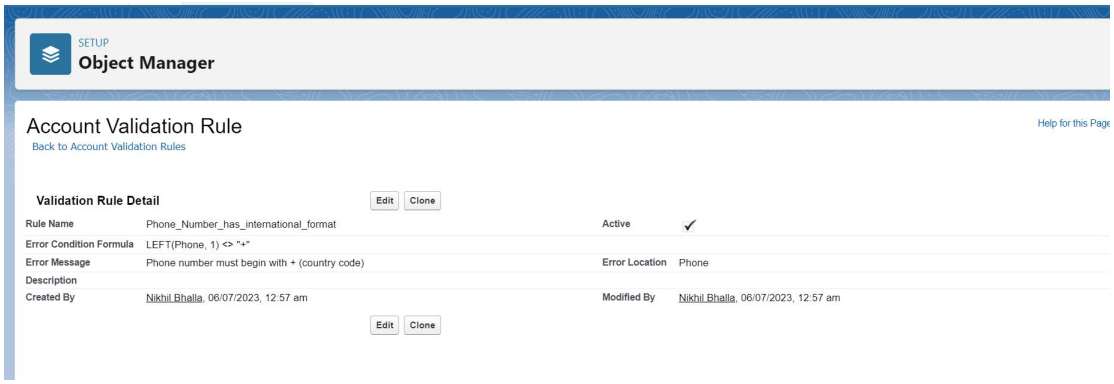


7. Creating Validation rules

Validation Rules

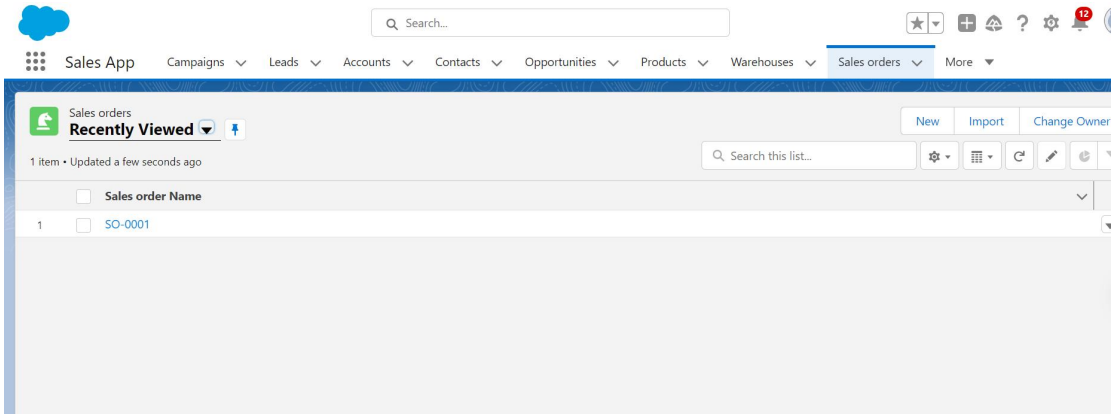
Validation rules verify that the data a user enters in a record meets the standards you specify before the user can save the

record. As a CRM product owner they requested to create a validation rule on account object on the phone field.

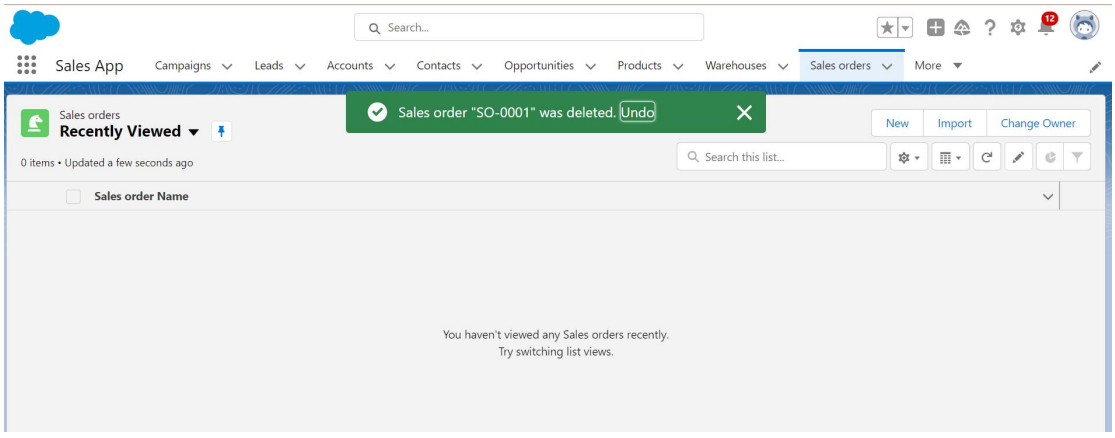


8.1 User Adoption

Creating & viewing a Record (Sales Order)



Deleting a Record (Sales Order)



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.

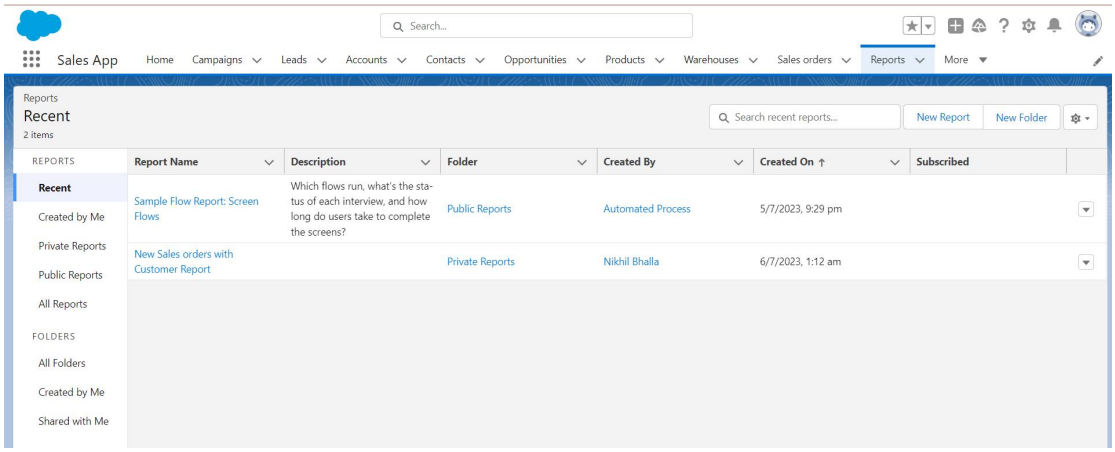
   In custom report types we can specify objects which will be available in a particular report. The primary object must have a relationship with other objects present in a report type either directly or indirectly.

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

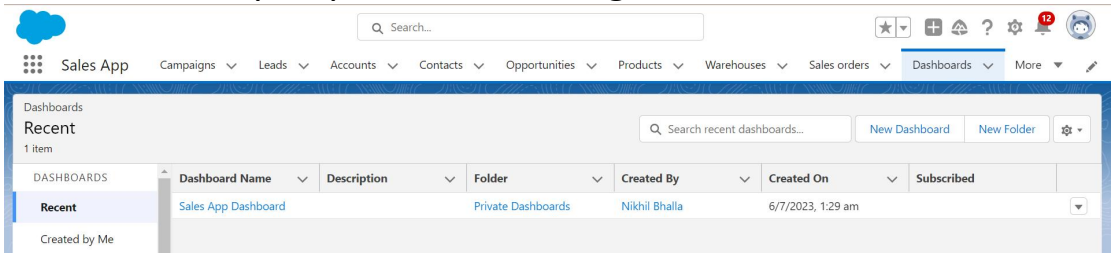


10. Creating Dashboard

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.

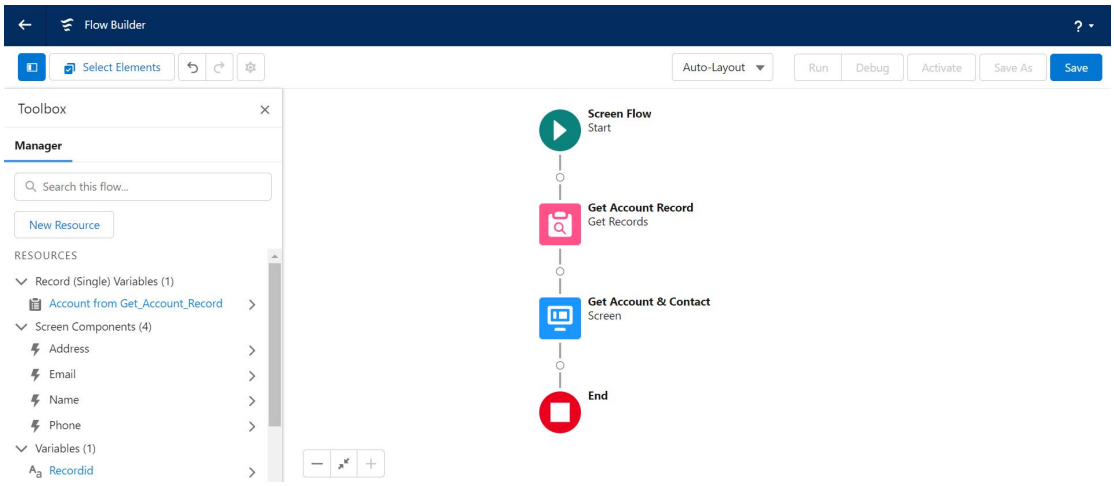


11.Creating different types of flows

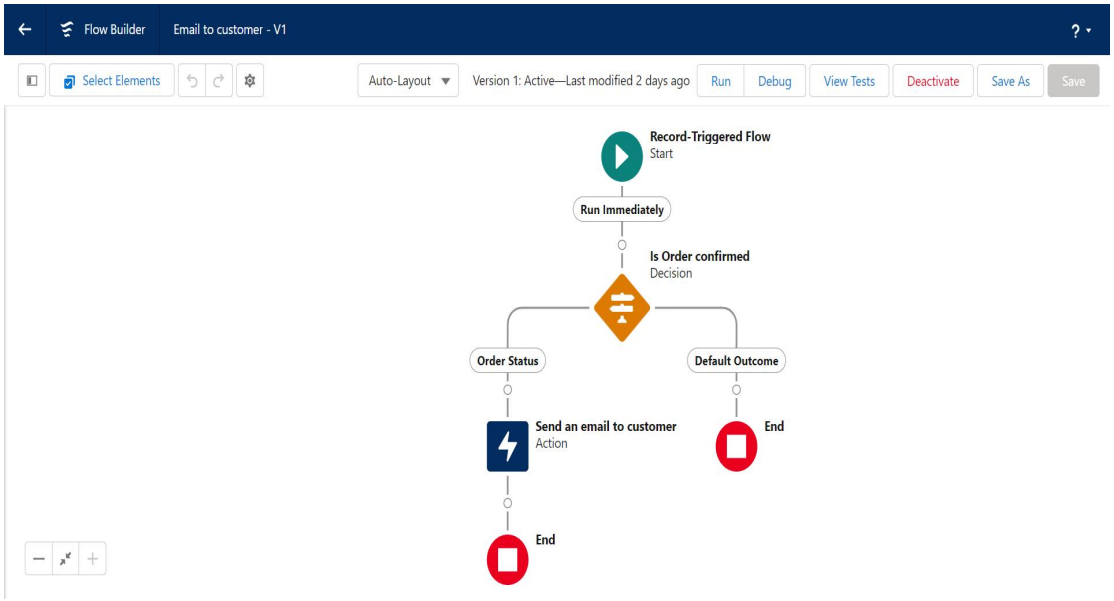
Flows

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.

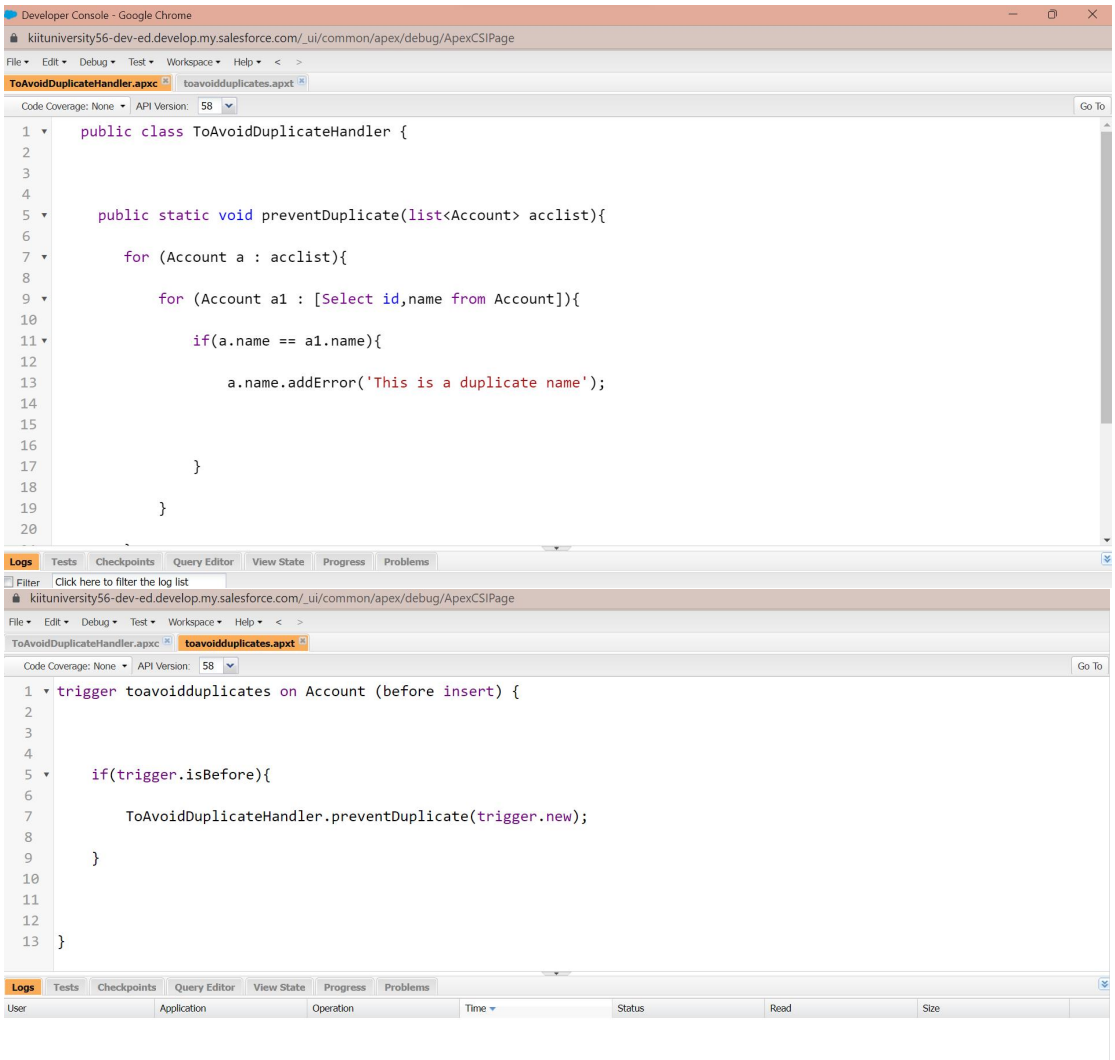
They are Before Triggers and After Triggers. Triggers allow modification of another record of the same type or different type.

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.



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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