

NM SMART INTERNZ PROJECT

RETAIL MANAGEMENT

APPLICATION USING

SALESFORCE

*Created by III B.Sc. Physics
students of Government Arts
College Udumalpet*

Team:

- 1. Pradeep. C (lead)*
- 2. Prasith. P*
- 3. Rishigash. S*
- 4. Santhoshkumar. B*

RETAIL MANAGEMENT APPLICATION USING SALESFORCE

1. INTRODUCTION

1.1. OVERVIEW

The project aims to provide real time knowledge for all students who have basic idea of salesforce. This project will also help professionals who are in cross-technology and want to switch to salesforce. It helps to educate about salesforce and to slack up their portfolio. 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.

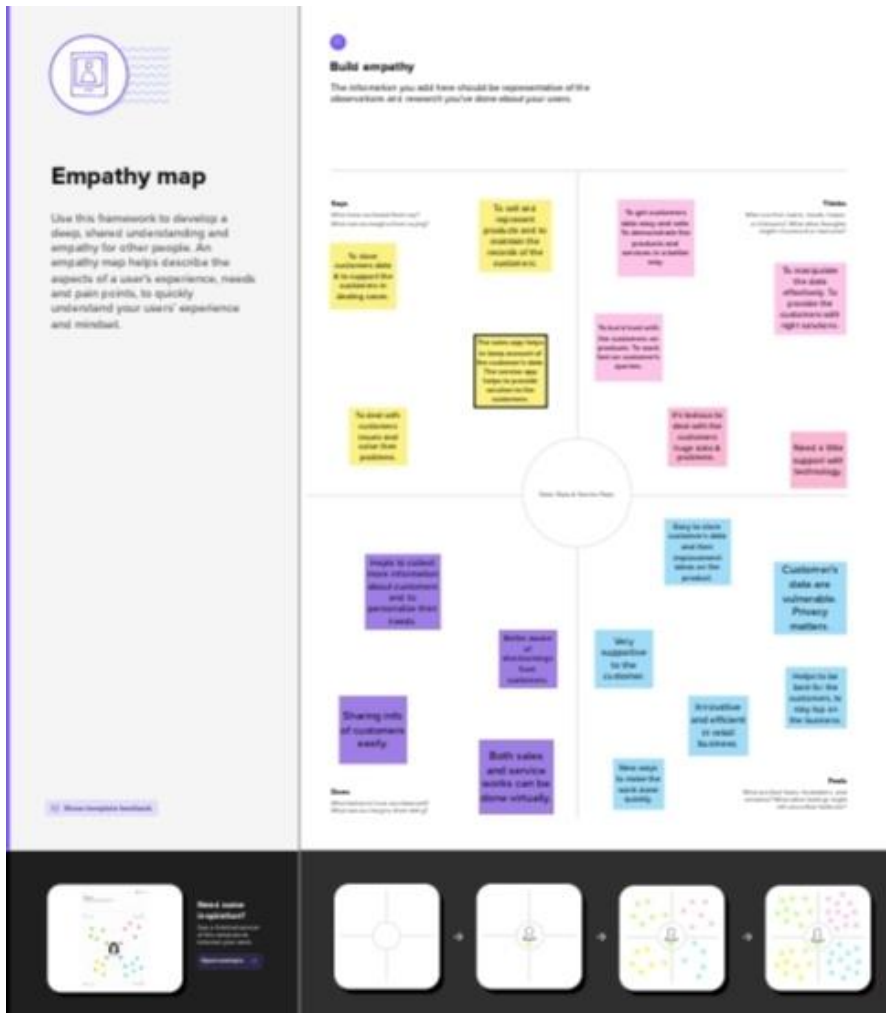
1.2. PURPOSE

- What is real time salesforce project?
- Object and Relationships.

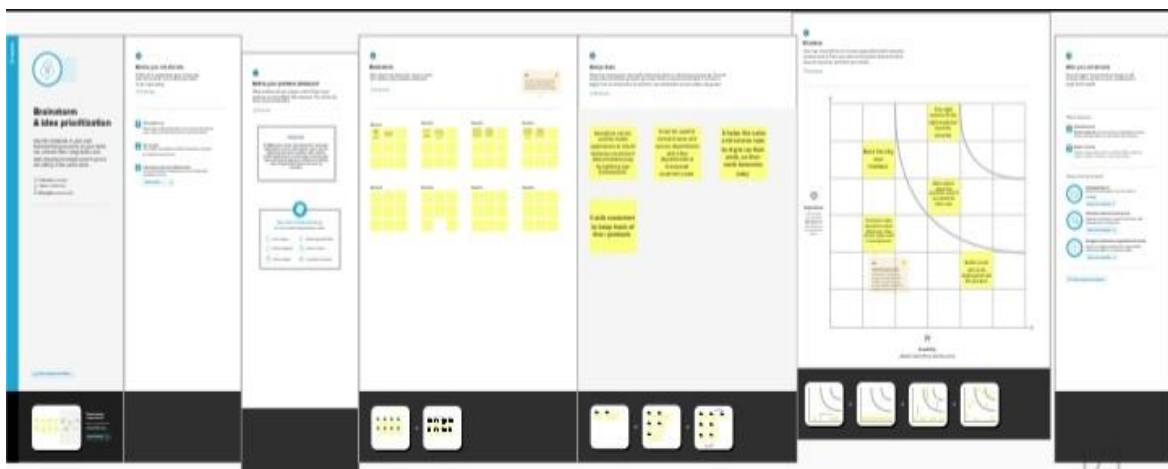
- Profile.
- Application.
- Layouts.
- Users.
- Validation Rules.
- Reports.
- Dashboard.

2. PROBLEM DEFINITION & DESIGN THINKING

2.1 Empathy Map



2.2 Brainstorming Map



3. RESULT

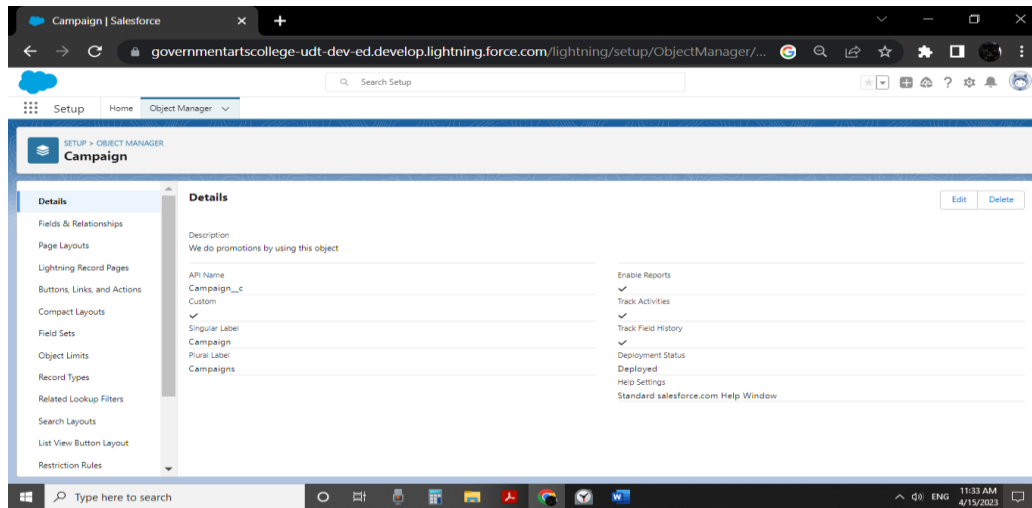
3.1 Data Model

Object Name	Fields in the object	
	Field Label	Data Type
Campaign	Campaign Name	Text (80)
	Owner	Lookup (User, Group)
Leads	Leads Name	Text (80)
	Owner	Lookup (User, Group)
Accounts	Accounts Name	Text (80)
	Owner	Lookup (User, Group)
Contacts	Contact Name	Text (80)
	Owner	Lookup (User, Group)
Opportunities	Opportunities Name	Text (80)
	Owner	Lookup (User, Group)
Products	Product Name	Text (80)
	Owner	Lookup (User, Group)
Warehouse	Warehouse Name	Text (80)
	Owner	Lookup (User, Group)
	Product Name	Text (80)
	Stocks Available	Checkbox
Sales Order	Sales Order Name	Text (80)
	Owner	Lookup (User, Group)
Dispatch/Tracking	Dispatch/Tracking Name	Text (80)
	Sales Order	Master-Detail(sales order)
Case	Case Name	Text (80)
	Owner	Lookup (User, Group)

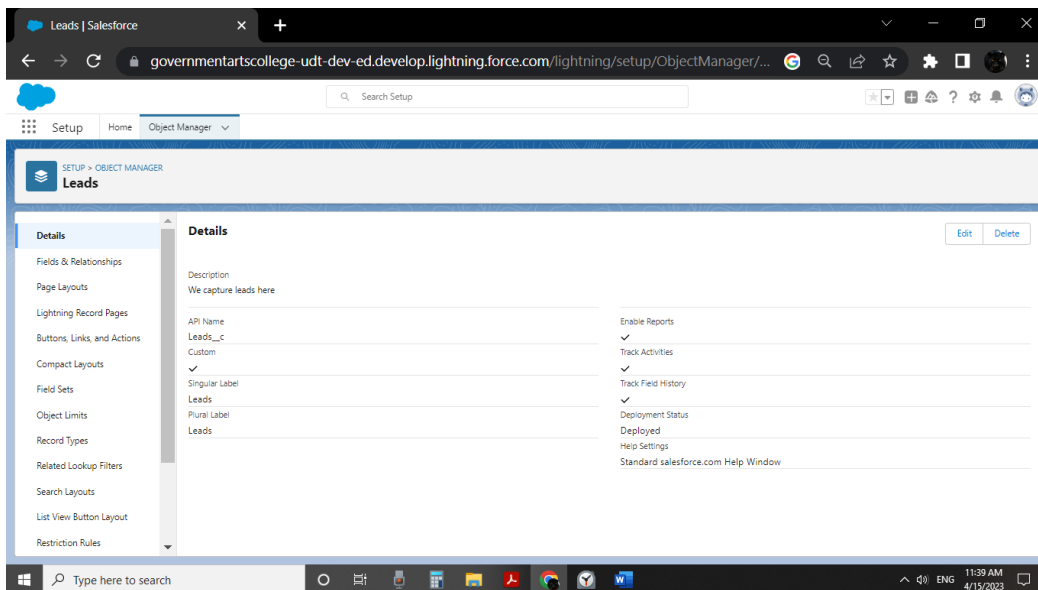
3.2 Activity & Screenshot

Objects:

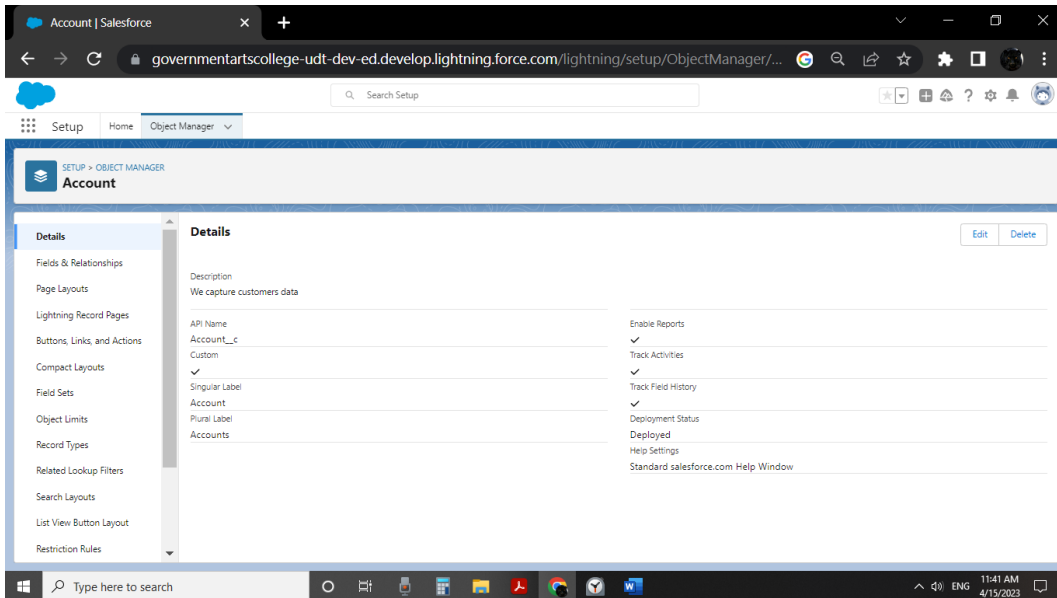
Campaign



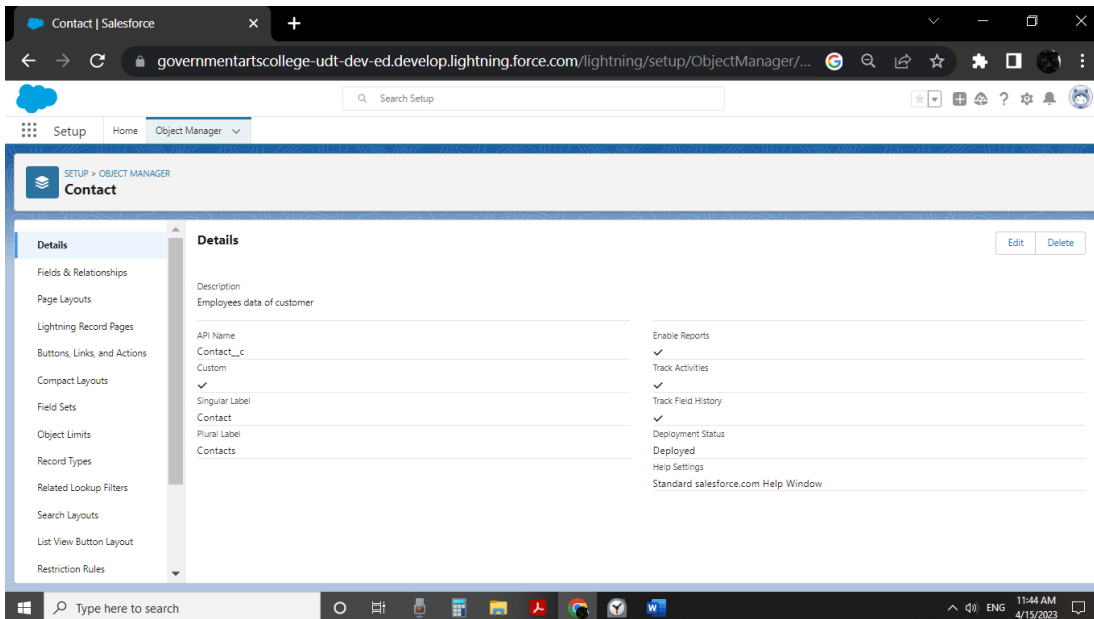
Leads



Accounts



Contacts



Opportunities

This screenshot shows the Salesforce Setup interface for the 'Opportunity' object. The browser address bar indicates the URL: `governmentartscollege-udt-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/...`. The page title is 'Opportunity | Salesforce'. The left sidebar contains a 'Details' menu with options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules. The main content area is titled 'Details' and includes an 'Edit' button and a 'Delete' button. The 'Description' field is set to 'SMB sales orders data'. The 'API Name' is 'Opportunity__c'. The 'Singular Label' is 'Opportunity' and the 'Plural Label' is 'Opportunities'. The 'Enable Reports' checkbox is checked. The 'Track Activities' checkbox is checked. The 'Track Field History' checkbox is checked. The 'Deployment Status' is 'Deployed'. The 'Help Settings' link points to 'Standard salesforce.com Help Window'.

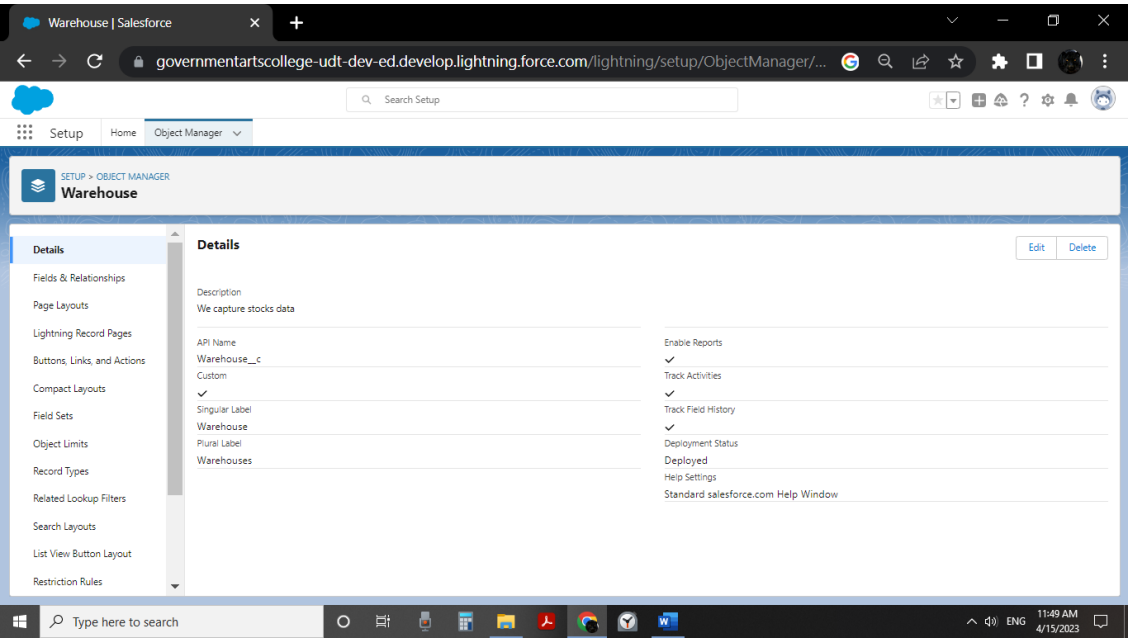
Field	Value
Description	SMB sales orders data
API Name	Opportunity__c
Custom	Custom
Singular Label	Opportunity
Plural Label	Opportunities
Enable Reports	✓
Track Activities	✓
Track Field History	✓
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Product

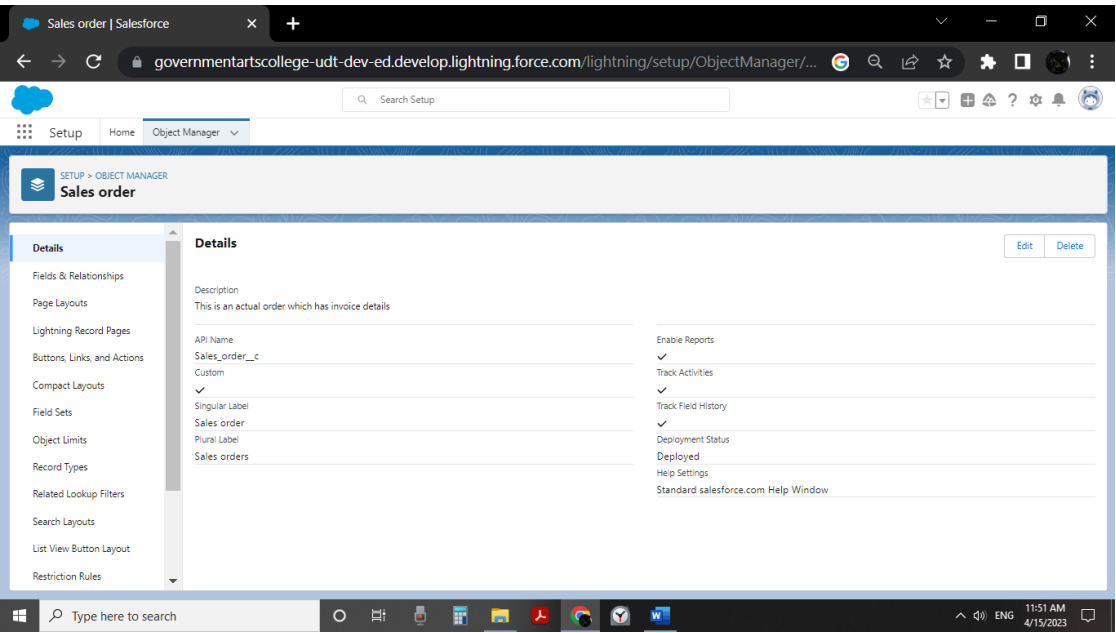
This screenshot shows the Salesforce Setup interface for the 'Product' object. The browser address bar indicates the URL: `governmentartscollege-udt-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/...`. The page title is 'Product | Salesforce'. The left sidebar contains a 'Details' menu with options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules. The main content area is titled 'Details' and includes an 'Edit' button and a 'Delete' button. The 'Description' field is set to 'Here we store product details i.e. electronic types'. The 'API Name' is 'Product__c'. The 'Singular Label' is 'Product' and the 'Plural Label' is 'Products'. The 'Enable Reports' checkbox is checked. The 'Track Activities' checkbox is checked. The 'Track Field History' checkbox is checked. The 'Deployment Status' is 'Deployed'. The 'Help Settings' link points to 'Standard salesforce.com Help Window'.

Field	Value
Description	Here we store product details i.e. electronic types
API Name	Product__c
Custom	Custom
Singular Label	Product
Plural Label	Products
Enable Reports	✓
Track Activities	✓
Track Field History	✓
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Warehouse



Sales Order



Dispatch/Tracking

The screenshot shows the Salesforce Setup interface for the 'Dispatch/Tracking' object. The browser address bar displays the URL: `governmentartcollege-udt-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/...`. The page title is 'Dispatch/Tracking'. The left sidebar contains a 'Details' menu with options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules. The main content area, titled 'Details', shows the following information:

Field	Value
Description	Orders dispatch related info will be stored here
API Name	Dispatch_Tracking__c
Custom	✓
Singular Label	Dispatch/Tracking
Plural Label	Dispatches/Tracking
Enable Reports	✓
Track Activities	✓
Track Field History	✓
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

The bottom of the screen shows the Windows taskbar with the search bar and system clock indicating 11:52 AM on 4/15/2023.

Cases

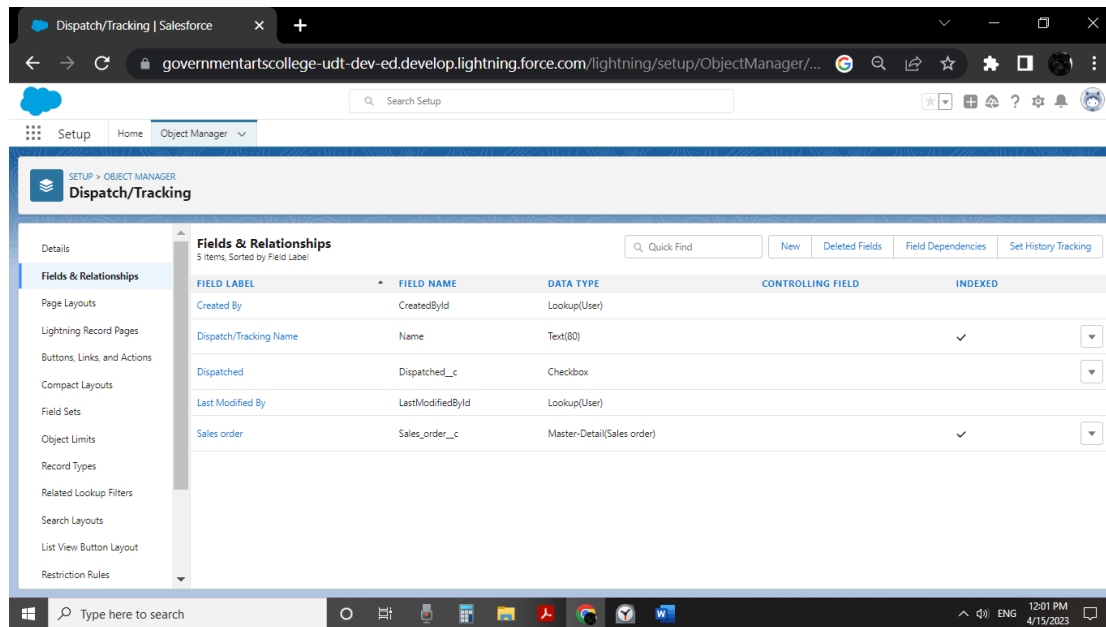
The screenshot shows the Salesforce Setup interface for the 'Case' object. The browser address bar displays the URL: `governmentartcollege-udt-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/...`. The page title is 'Case'. The left sidebar contains a 'Details' menu with options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules. The main content area, titled 'Details', shows the following information:

Field	Value
Description	Historical problems of customers will be stored here
API Name	Case__c
Custom	✓
Singular Label	Case
Plural Label	Cases
Enable Reports	✓
Track Activities	✓
Track Field History	✓
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

The bottom of the screen shows the Windows taskbar with the search bar and system clock indicating 11:53 AM on 4/15/2023.

Fields:

Dispatch/Tracking

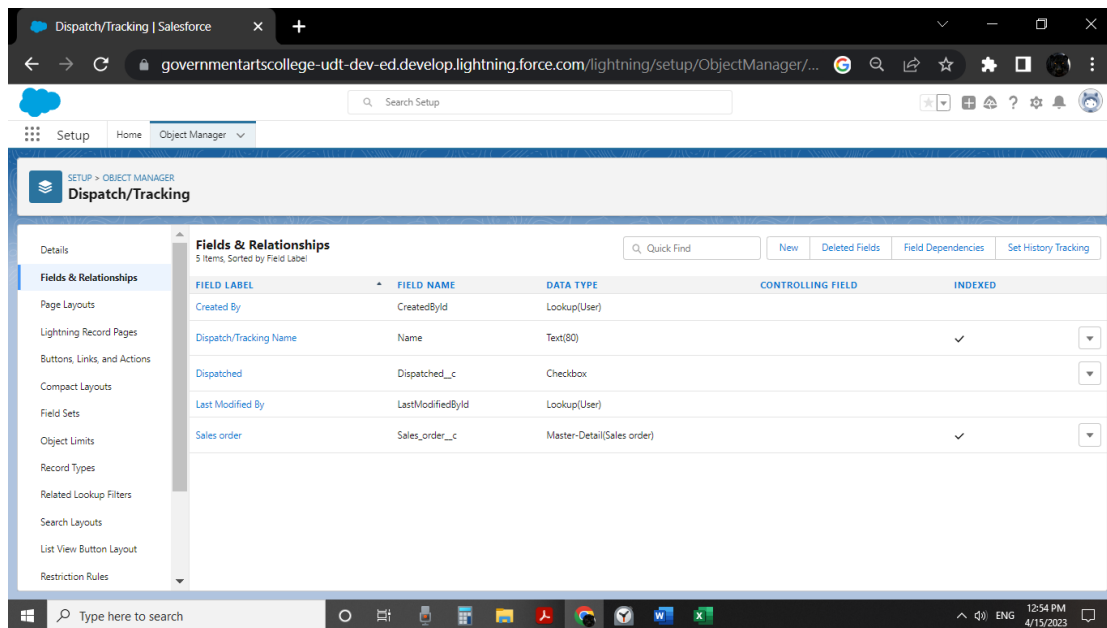


The screenshot shows the Salesforce Object Manager interface for the 'Dispatch/Tracking' object. The 'Fields & Relationships' tab is selected, displaying a list of 5 fields. The fields are sorted by Field Label. The table includes columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Dispatch/Tracking Name	Name	Text(80)		✓
Dispatched	Dispatched__c	Checkbox		✓
Last Modified By	LastModifiedById	Lookup(User)		
Sales order	Sales_order__c	Master-Detail(Sales order)		✓

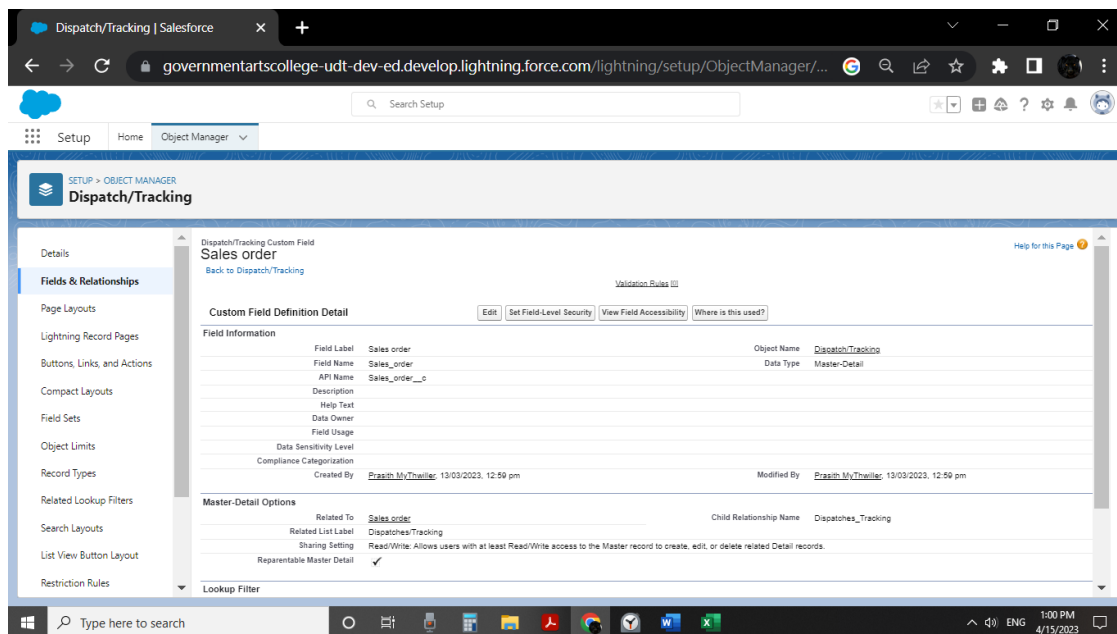
Fields available on Dispatching/Tracking

1. Dispatched.
2. Expected date of delivery.
3. Tracking Id.
4. Sales Order



Relationship b/w objects

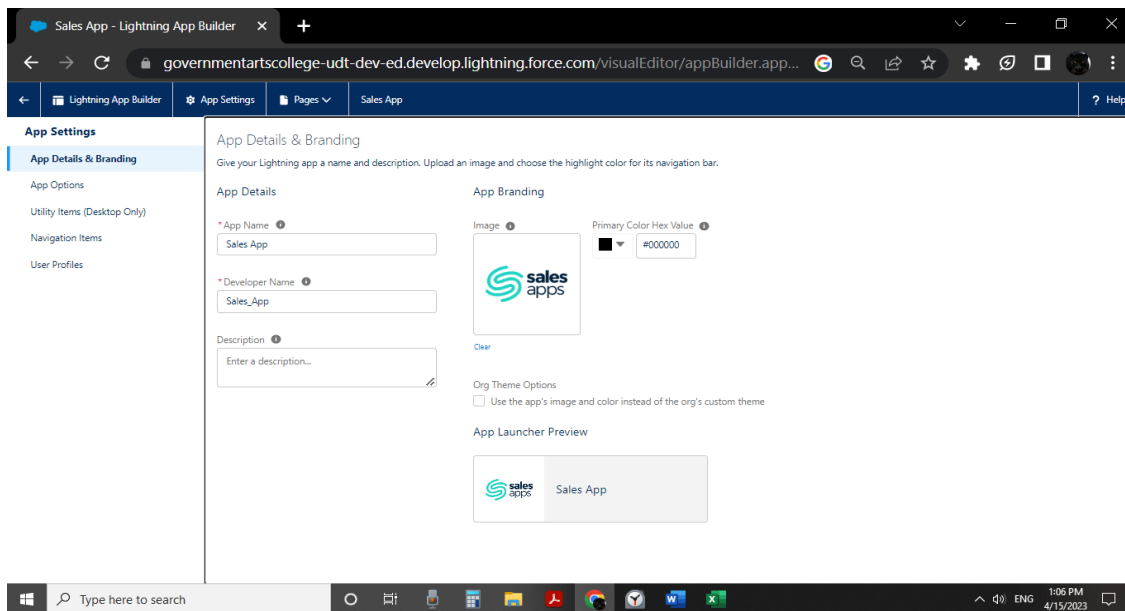
Object relationships are special field types that connect two objects. As a CRM product owner create relationships to link objects with each other.



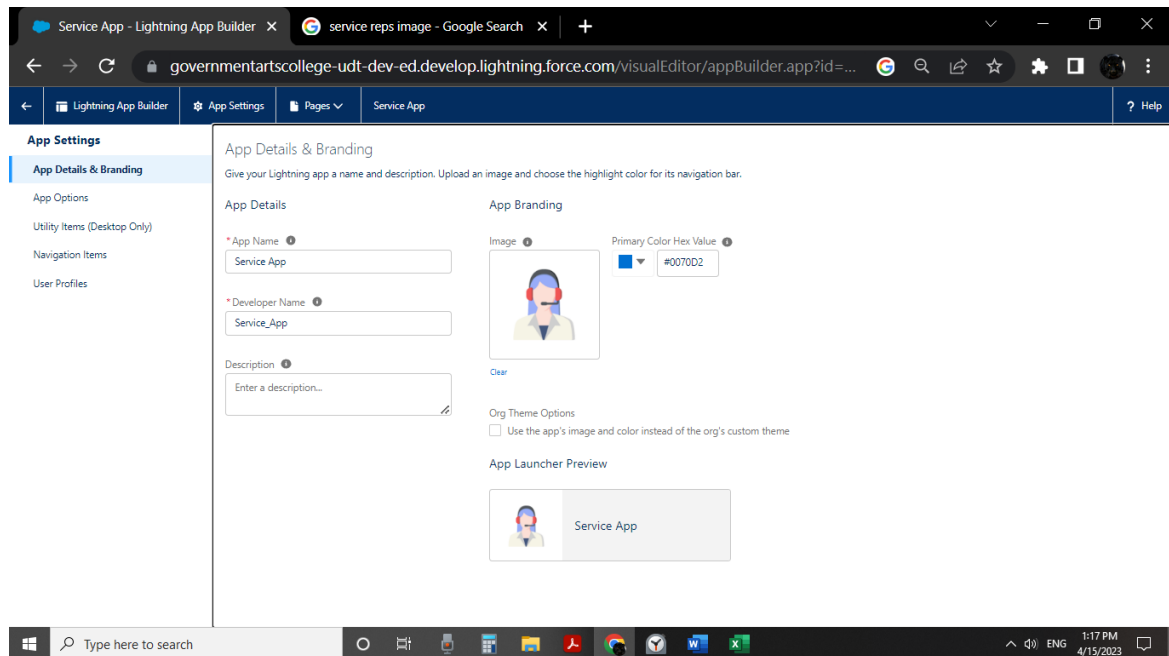
Creation of Application

Apps in salesforce are a group of tabs that help the application function by working together as a unit it has name, a logo, and a particular.

Sales App



Service App

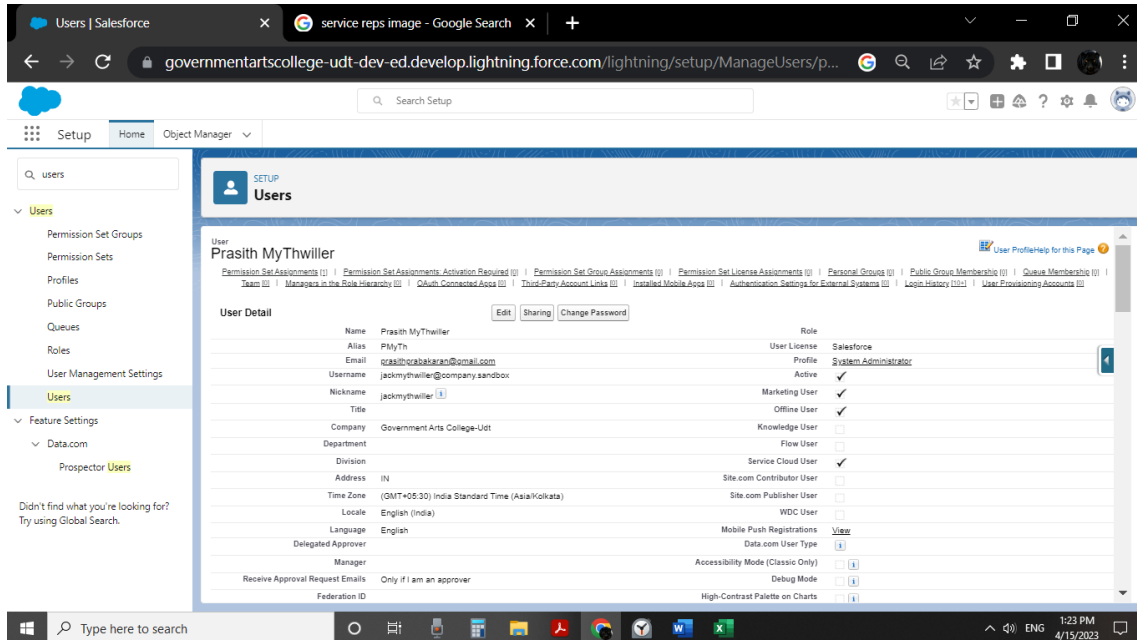


Layouts

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

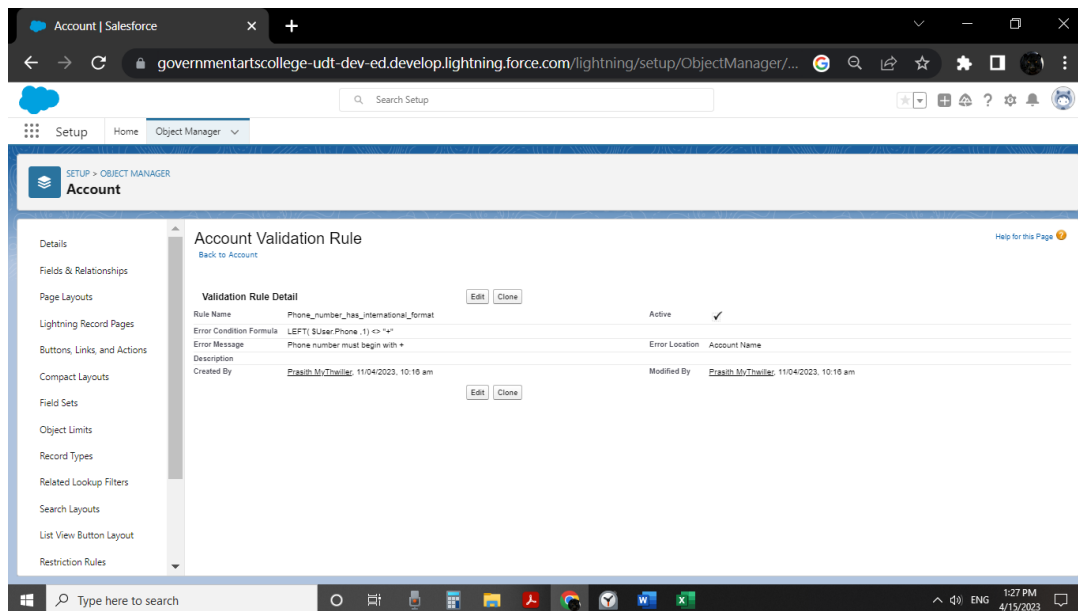
User

A user is anyone who logs in to Salesforce.



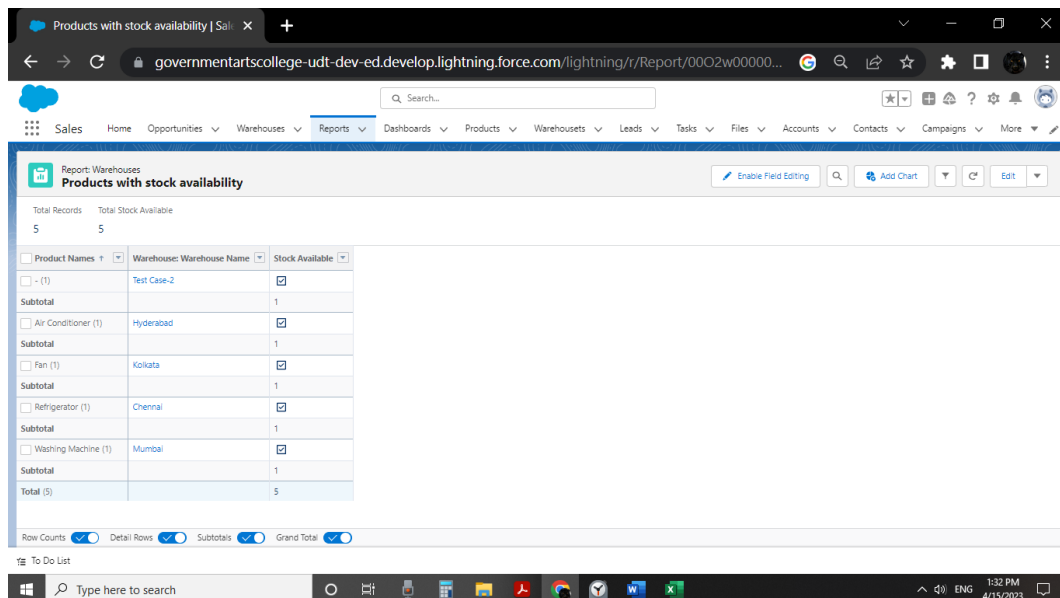
Validation Rules

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



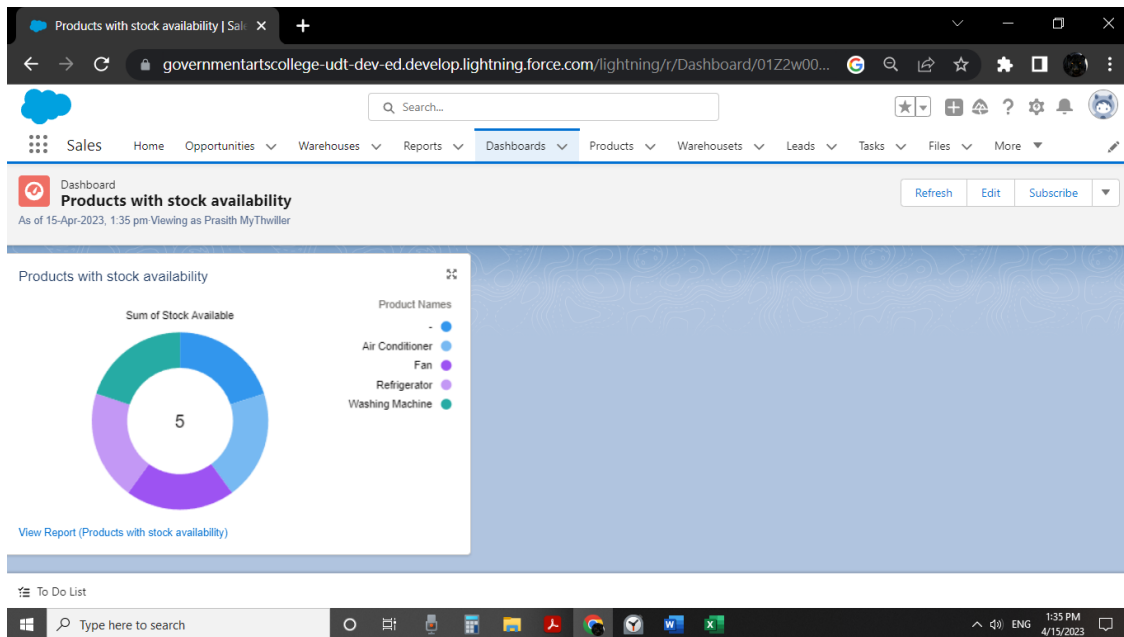
Reports

A report is a list of records that meet the criteria you define.



Dashboard

Dashboards in salesforce are graphical representation of reports.



4. Trailhead Profile Public URL

Team Lead - <https://trailblazer.me/id/pradc8>

Team Member 1 -

<https://trailblazer.me/id/jkmythwiller>

Team Member 2 - <https://trailblazer.me/id/srdev9>

Team Member 3 -

<https://trailblazer.me/id/skumar8937>

5. Advantage & Disadvantages

Advantages

- Optimizes all store processes.
- Enhances a work environment.
- Improves customer retention.
- Increases a company's overall revenue.

Disadvantages

- High marketing cost.
- Selling skill required.
- Very high competition.
- No economics of buying.
- Requires proper location.

6. Applications

Salesforce can be used to manage orders from retail stores and distributors, including tracking orders, processing payments and managing inventory levels.

7. Conclusion

We have created two applications for sales reps and service reps to sales reps and service reps as per the CRM product owner request.

8. Future Scopes

Supervisory, client communication, merchandize shipment, sales, management and administrative services.