



RETAIL MANAGEMENT APPLICATION USING SALESFORCE

TEAM ID: NM2023TMID35195

TEAM SIZE:4

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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.

Milestone-1 :

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:

<https://youtu.be/r9EX3lGde5k>

Activity-1

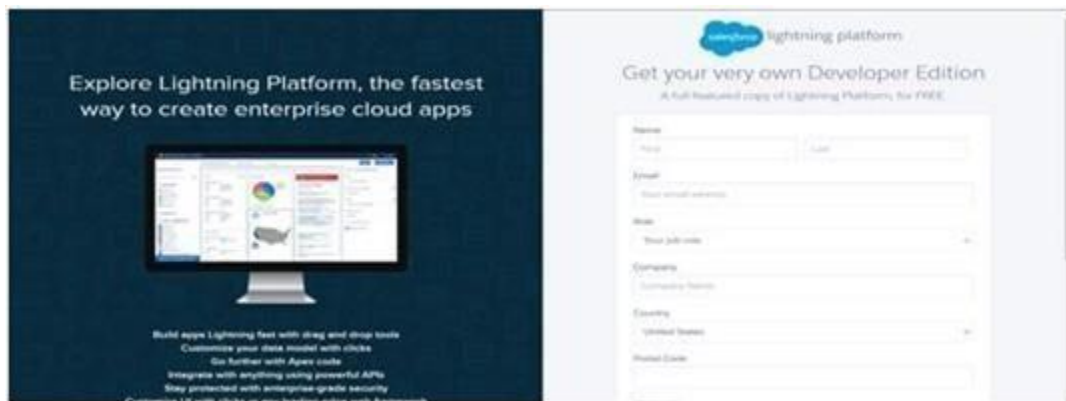
Creating Developer Account

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 :

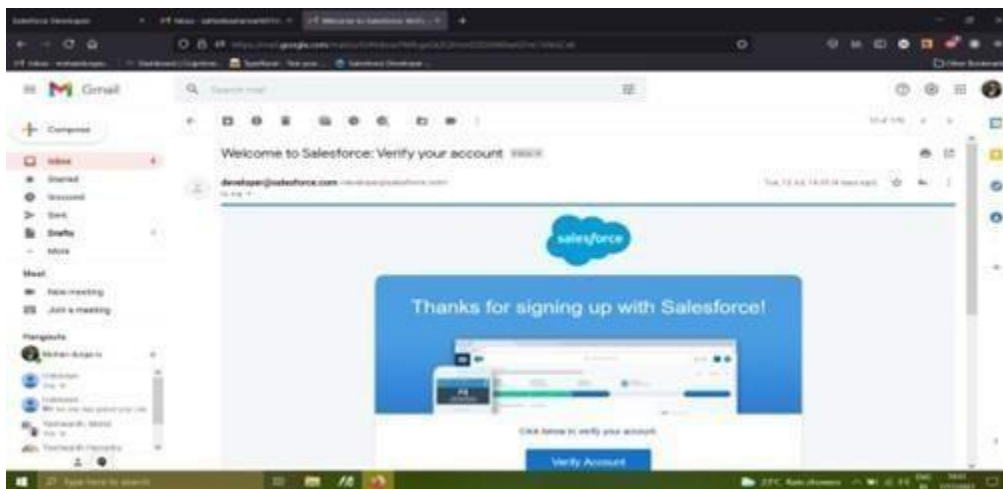
username@organization.com

Click on sign up after filling these.



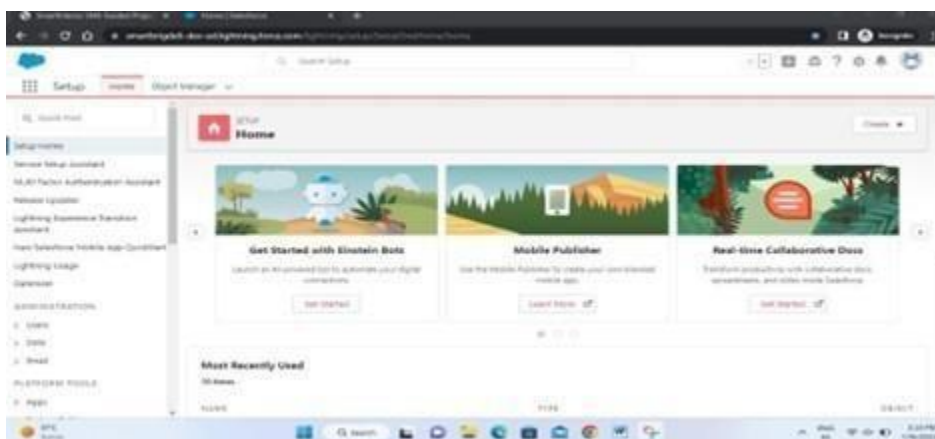
Account Activation

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.



Salesforce Login
<https://login.salesforce.com>

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

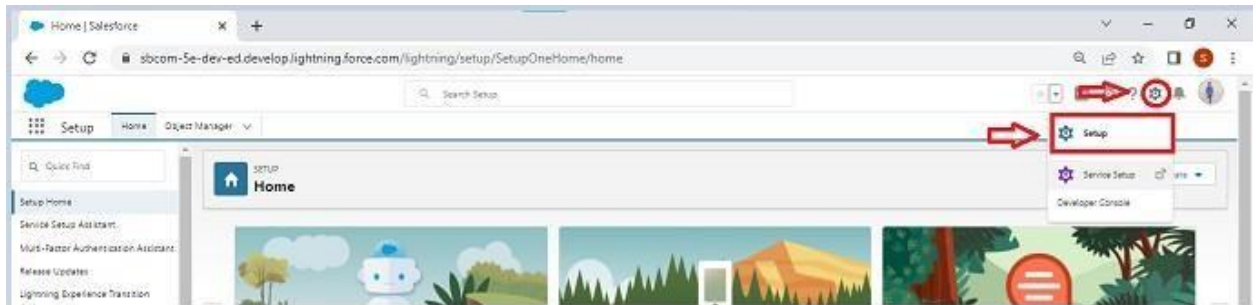
Application	Object	Description
Sales app	Campaign	We do promotions by using this object
	Leads	We capture leads here
	Accounts	We capture customers data
	contacts	Employees data of customer
	opportunities	SMB sales orders data
	products	Here we store product details i.e electronic types
	Warehouse	We 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

Activity-1

Creation of object Dispatch/Tracking

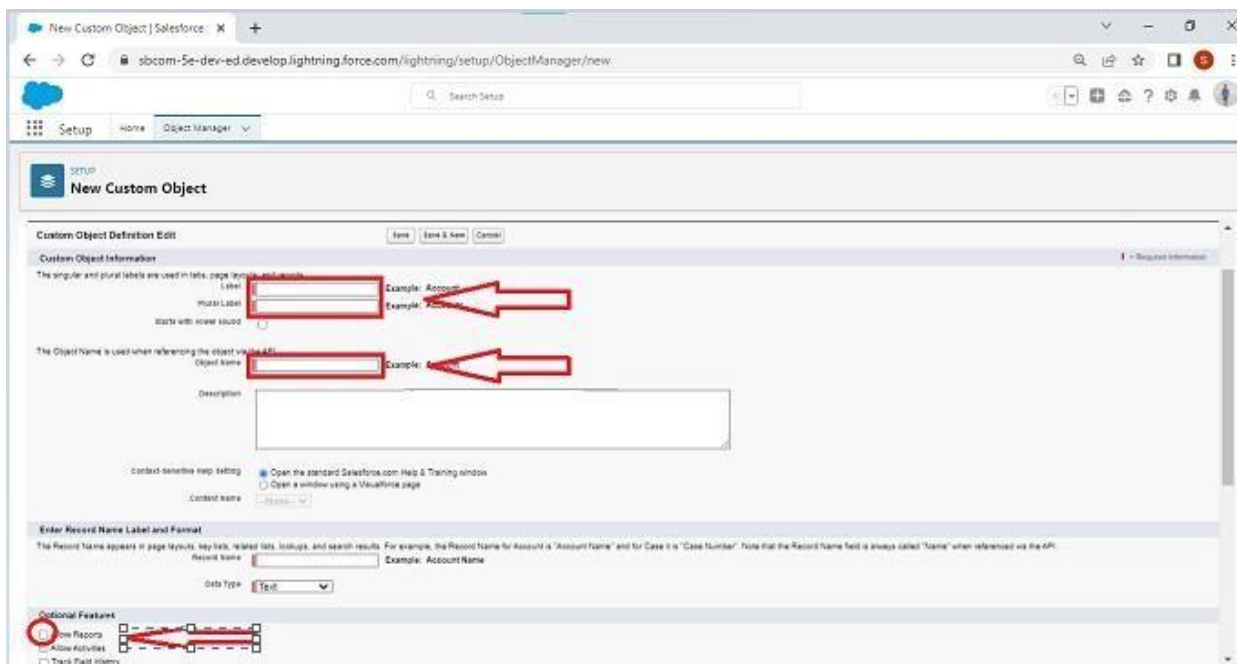
- 1) Navigate to setup and select object manager.



- 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.



- 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.

The screenshot shows the 'Optional Features' section with 'Allow Reports' checked. Below it, the 'Object Classification' section has 'Allow Sharing', 'Allow Bulk API Access', and 'Allow Streaming API Access' checked. The 'Deployment Status' section has 'Deployed' selected. The 'Search Status' section has 'Allow Search' checked. The 'Object Creation Options' section has 'Add Notes and Attachments related list to default page layout' and 'Launch New Custom Tab Wizard after saving this custom object' checked. At the bottom, the 'Save' button is highlighted with a red arrow.

- 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.

The screenshot shows the 'New Custom Object Tab' configuration page. The 'tab style' dropdown menu is highlighted with a red arrow. The 'Next' button at the bottom right is also highlighted with a red arrow.

- 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.

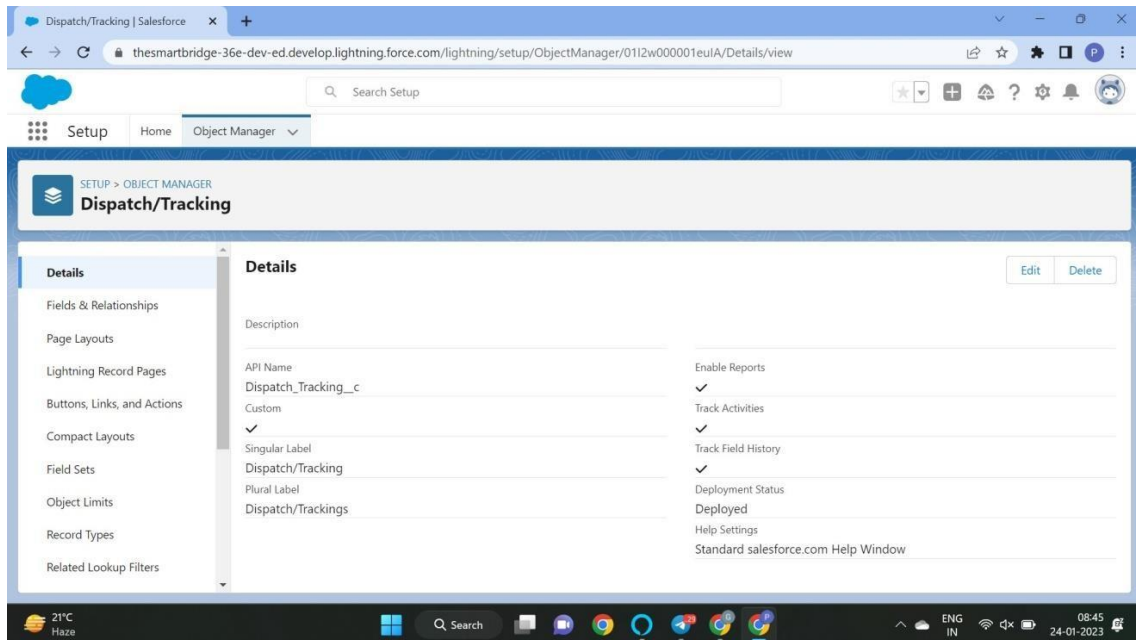
Activity-2 Fields available on Dispatch/tracking

- 1) Dispatched

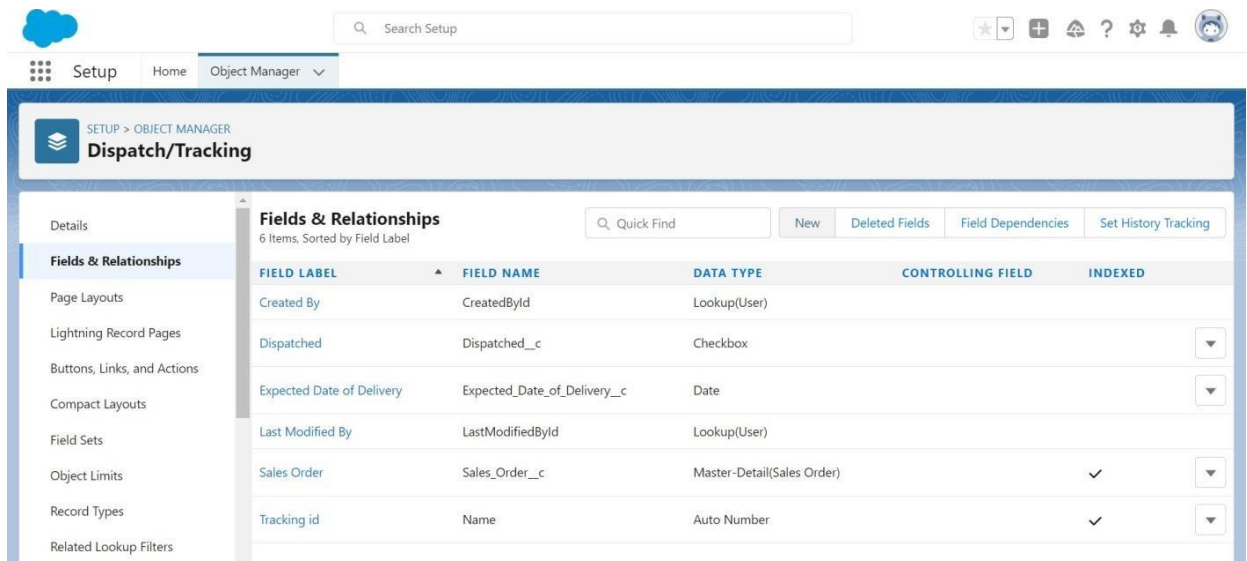
- 2) Expected date of delivery
- 3) Tracking Id
- 4) Sales order

Creation of fields on Dispatch/tracking

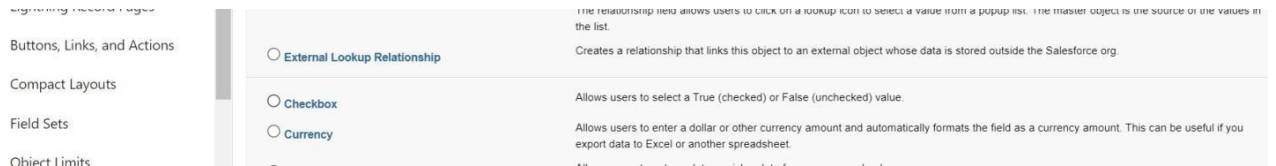
- 1) Select your object from object selection has Dispatch/Tracking.



- 2) And select the option fields and relationships.
- 3) At the top right side you can find a new select that option



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

Milestone-3 Relationship b/w objects:

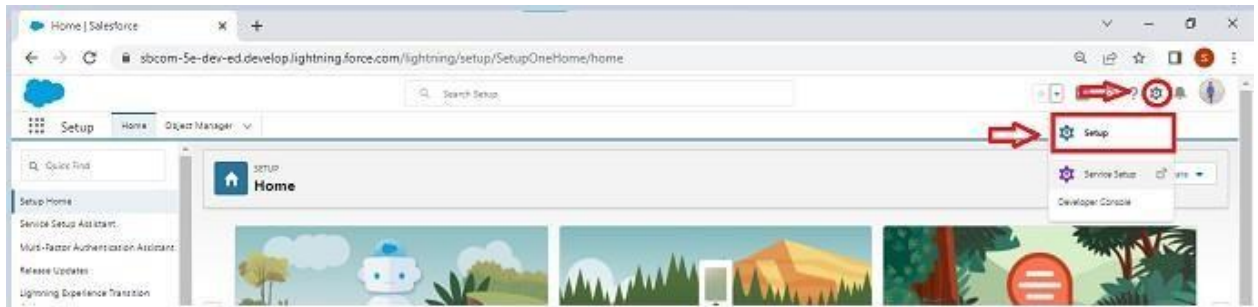
It's time to take things to the next level with object relationships. Object relationships are special field types that connect two objects. As a crm product owner create relationships to link objects with each other, so that when users view records, they can also see related data.

Activity-1:

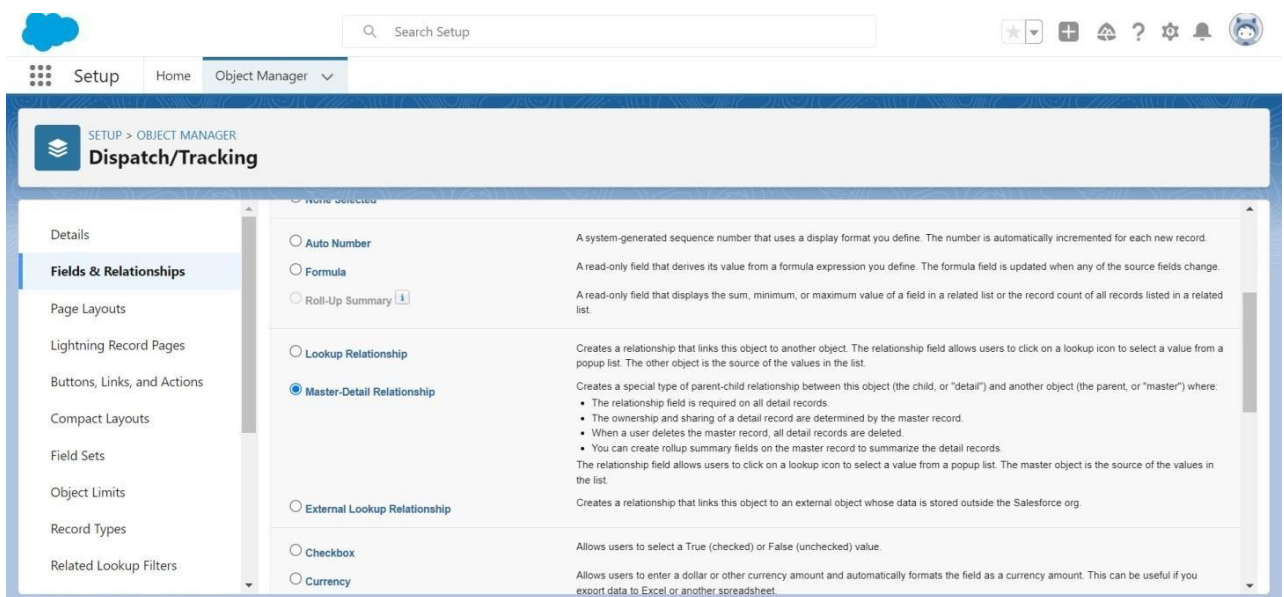
Creation of relationships between objects

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.



- 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.

The screenshot shows the Salesforce Setup interface for configuring the 'Dispatch/Tracking' object. The left sidebar contains a navigation menu with the following items: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Dispatch/Tracking' and includes a search bar at the top. Below the search bar, there are two dropdown menus: 'GDPR' (set to 'PCI') and an empty dropdown. The 'Master-Detail Options' section shows 'Related To' as 'Sales Order' and 'Child Relationship Name' as 'Dispatch_Trackings'. The 'Related List Label' is 'Dispatch/Trackings'. The 'Sharing Setting' section has two radio buttons: 'Read Only' (unselected) and 'Read/Write' (selected). The 'Allow reparenting' checkbox is unchecked. The 'Lookup Filter' section has a link to 'Tell me more!' and a 'Show Filter Settings' link. At the bottom, there are buttons for 'Change Field Type', 'Save', and 'Cancel'.

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

Related Lookup Filters

GDPR
PCI

Master-Detail Options

Related To: Sales Order

Child Relationship Name: Dispatch_Trackings

Related List Label: Dispatch/Trackings

Sharing Setting

Select the minimum access level required on the Master record to create, edit, or delete related Detail records.

☐ Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.

☒ Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.

Allow reparenting ☐ Child records can be reparented to other parent records after they are created

Lookup Filter

Optionally, create a filter to limit the records available to users in the lookup field. [Tell me more!](#)

[Show Filter Settings](#)

Change Field Type Save Cancel

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

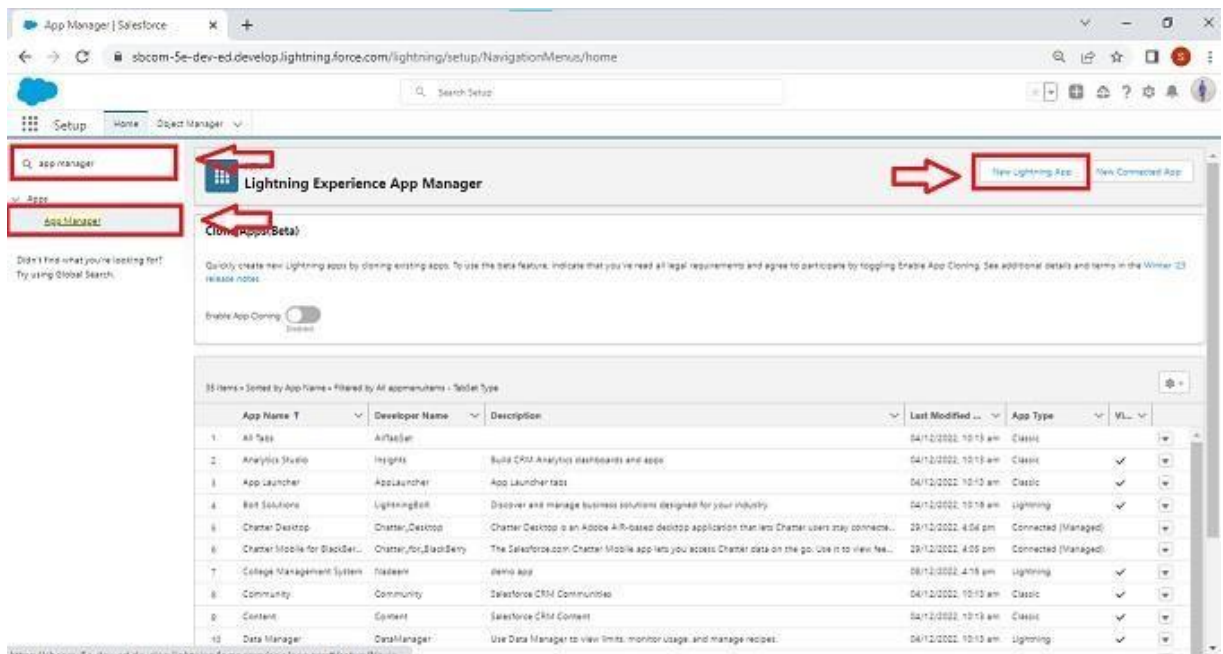
Milestone-4 Application:

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.

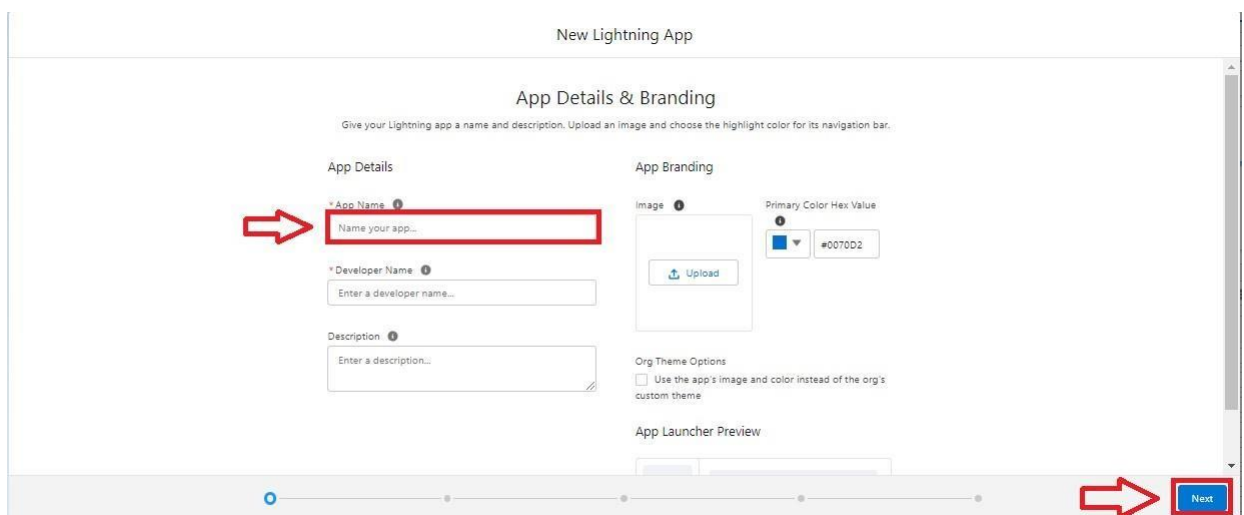
Activity-1

Creation of Application

- 1) Navigate to setup and search for app manager

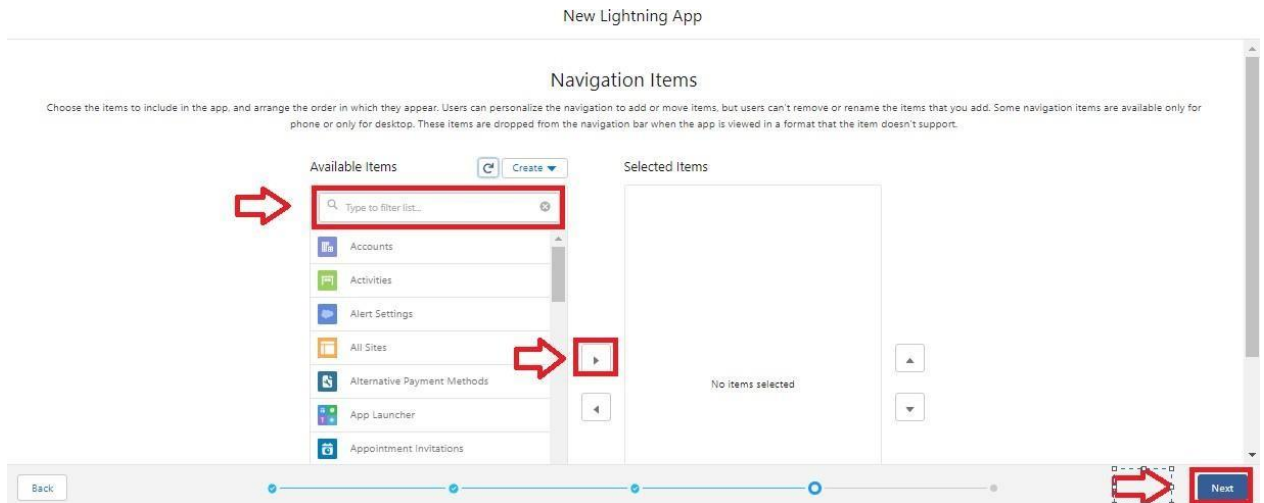


- 2) And select an option for a new lightning app.

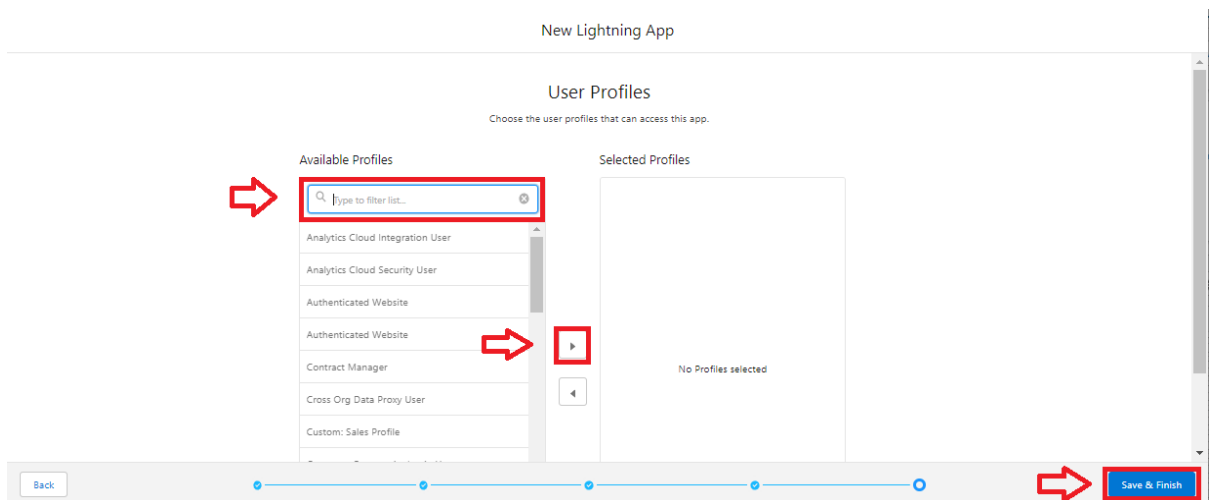


- 3) Give the app name has sales app.

- 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.



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.

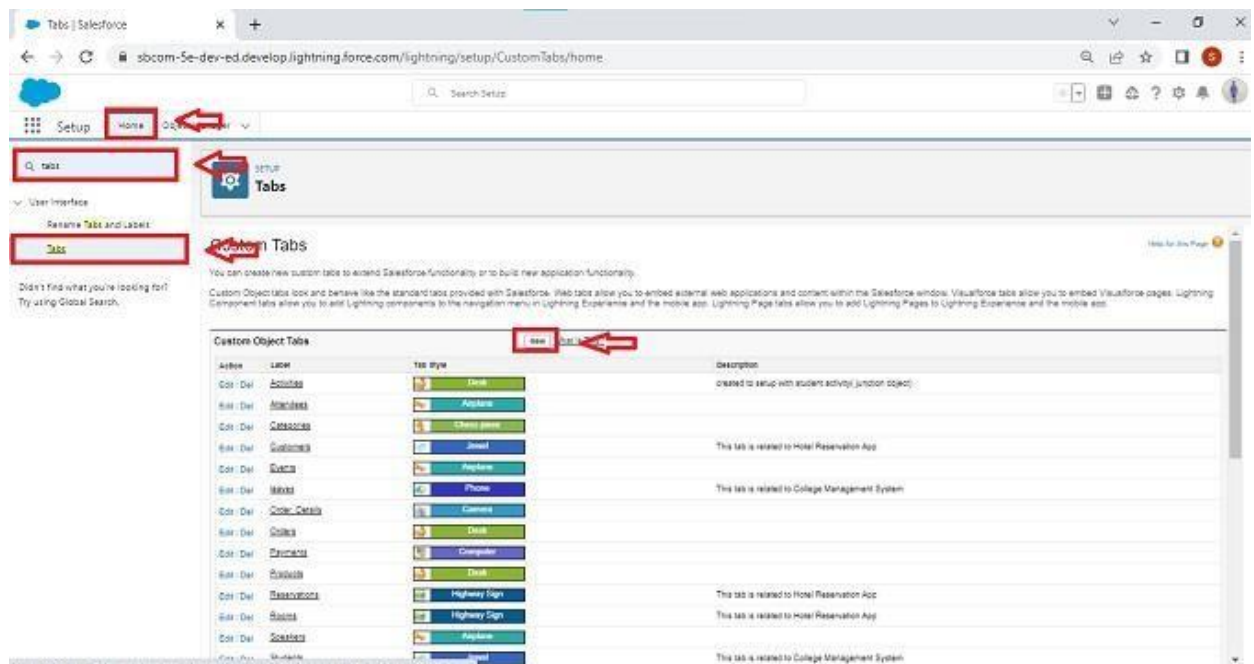
Custom Page layouts

- 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 Warehouse.
- 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.

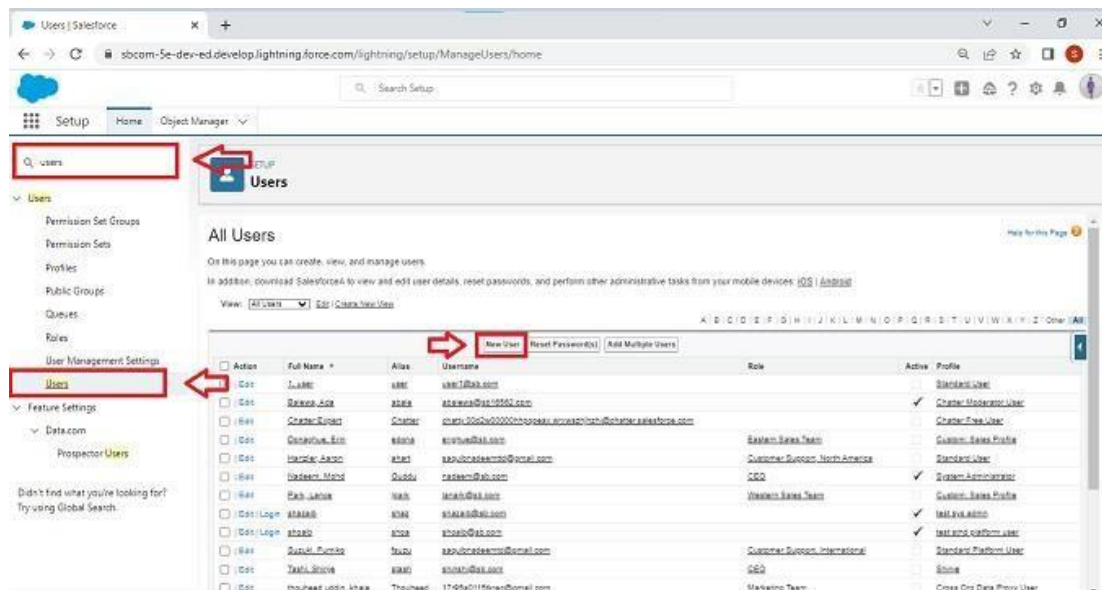
Milestone-6 User:

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.

The screenshot shows the Salesforce 'New User' setup page. The left sidebar contains navigation links for 'Users', 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', 'Feature Settings', 'Data.com', and 'Prospector Users'. The main content area is titled 'New User' and 'User Edit'. It has a 'Save' button at the top. Below it, there are two sections: 'General Information' and 'Role'. The 'General Information' section has fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. The 'Role' section has a dropdown menu for 'Role' with options like 'None Specified', 'XOrg Proxy User', and 'Cross Org Data Proxy User'. There are red arrows pointing to the 'Save' button and the 'Role' dropdown menu. A red box highlights the 'General Information' fields.

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

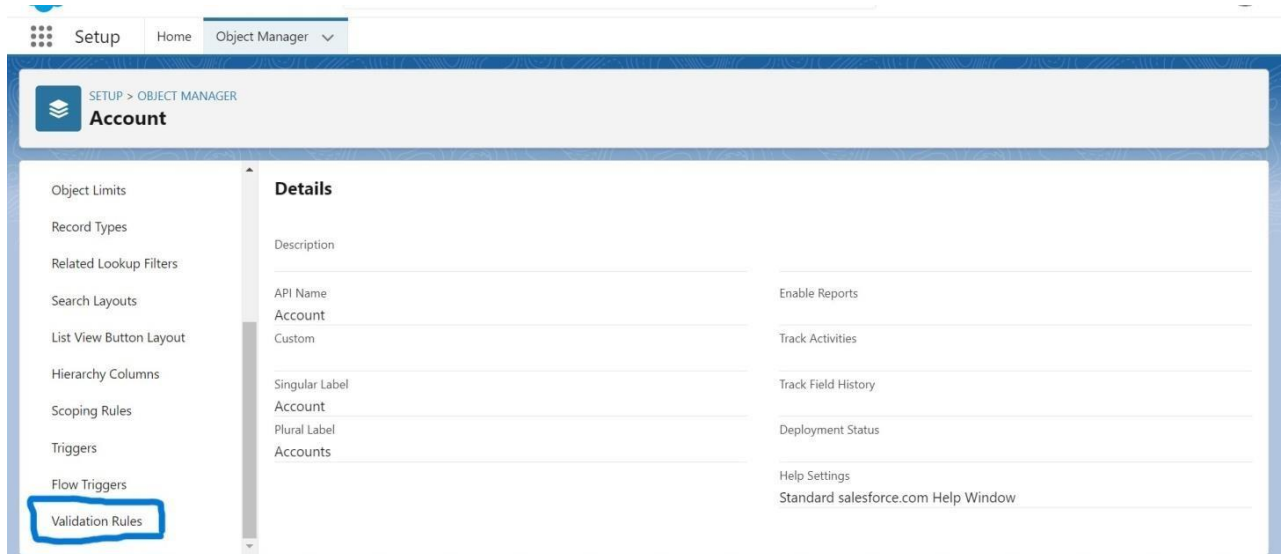
Milestone-7 Validation Rules:

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.

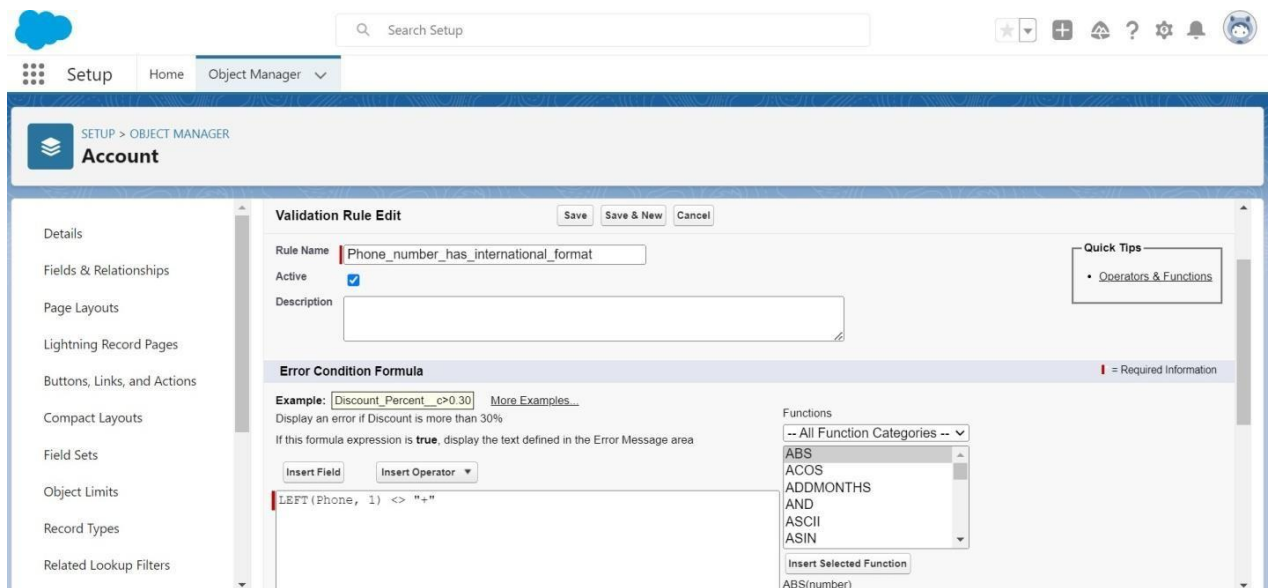
Activity-1:

Creation of validation rule

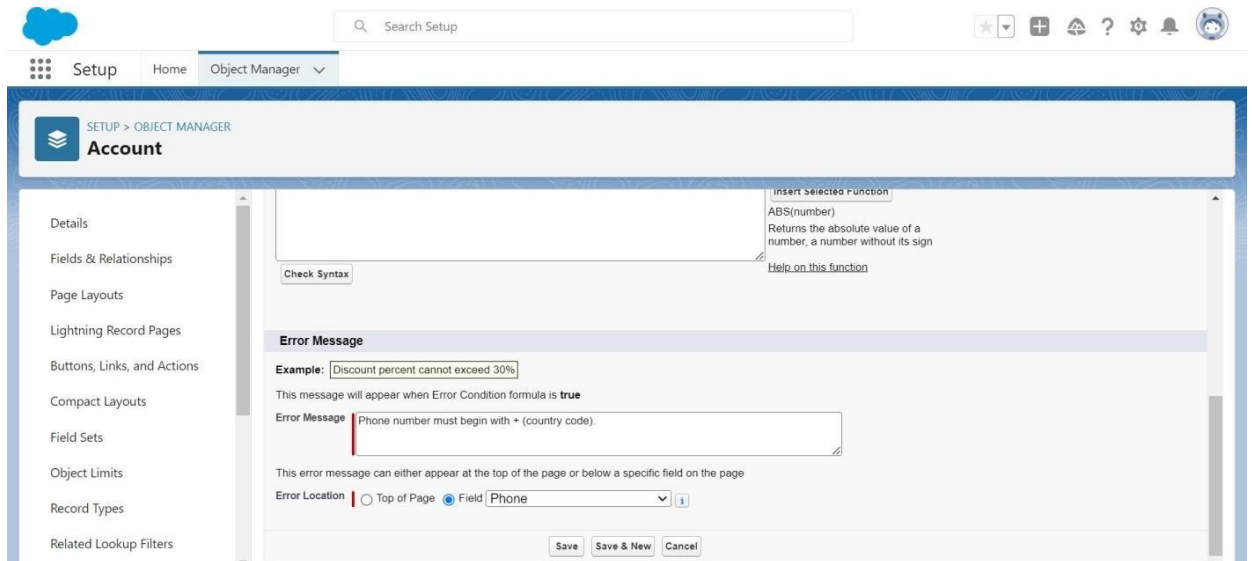
- 1) Navigate to object manager and select Account object.
- 2) In details section scroll down and find validation rule in it.



- 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.



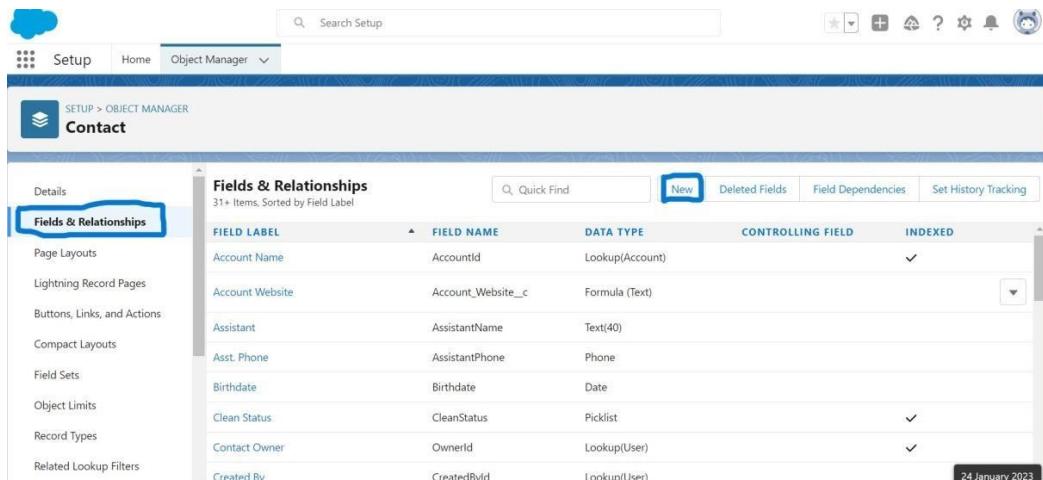
Activity-2 :

Cross Object Formula

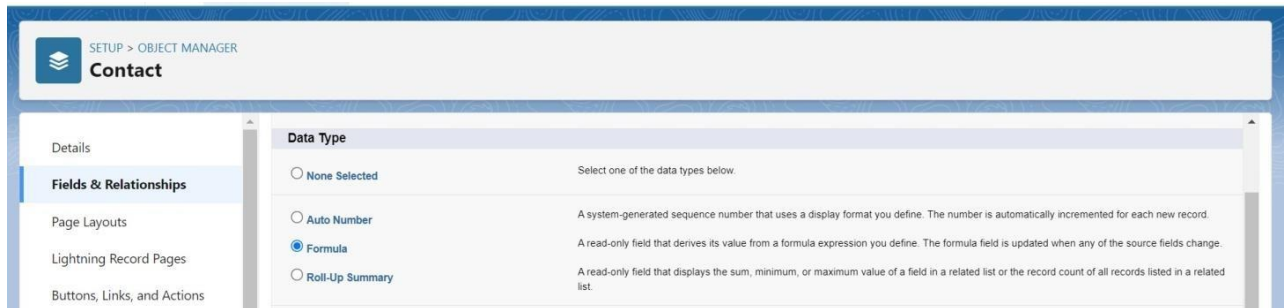
Using an object formula lets you reference merge fields on a master object from a master detail relationship on the detail object. As a crm product owner they wants to save user's clicks and displays contacts' parent accounts website value on the contact record so users do not have to click on the account 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.



- 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.



SETUP > OBJECT MANAGER
Contact

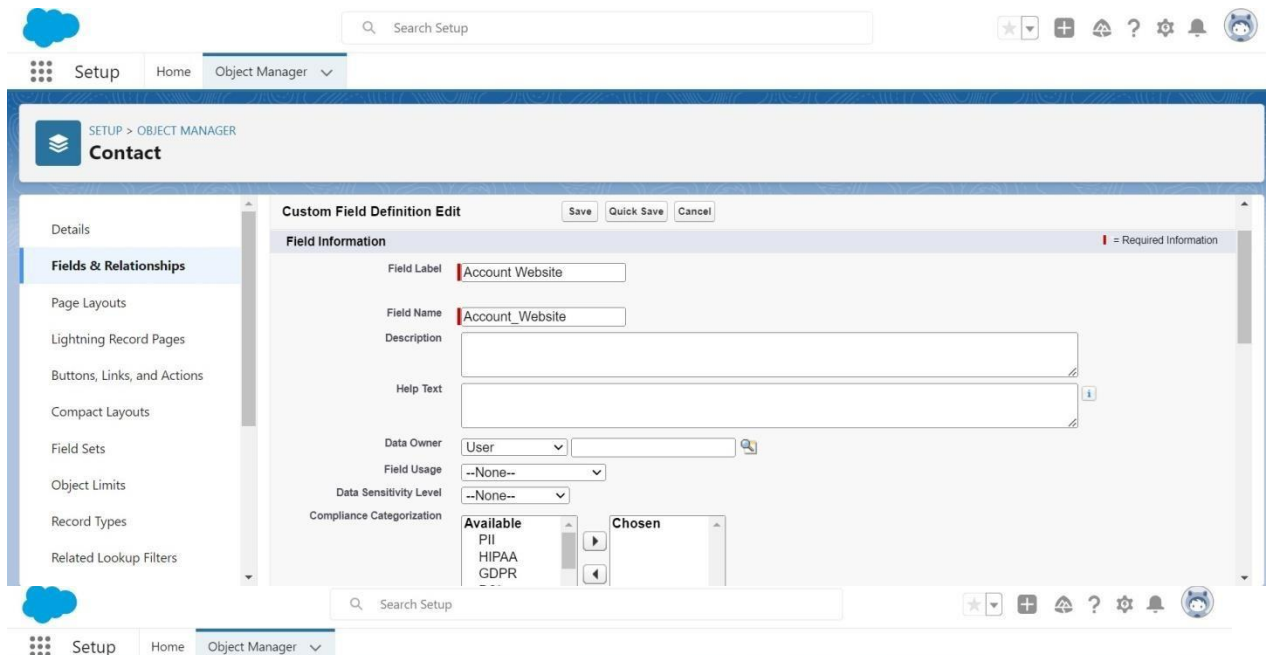
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions

Data Type

Select one of the data types below.

- ☐ None Selected
- ☐ Auto Number
A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
- ☒ **Formula**
A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
- ☐ Roll-Up Summary
A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

- 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.



SETUP > OBJECT MANAGER
Contact

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters

Custom Field Definition Edit Save Quick Save Cancel

Field Information ⓘ = Required Information

Field Label

Field Name

Description

Help Text

Data Owner

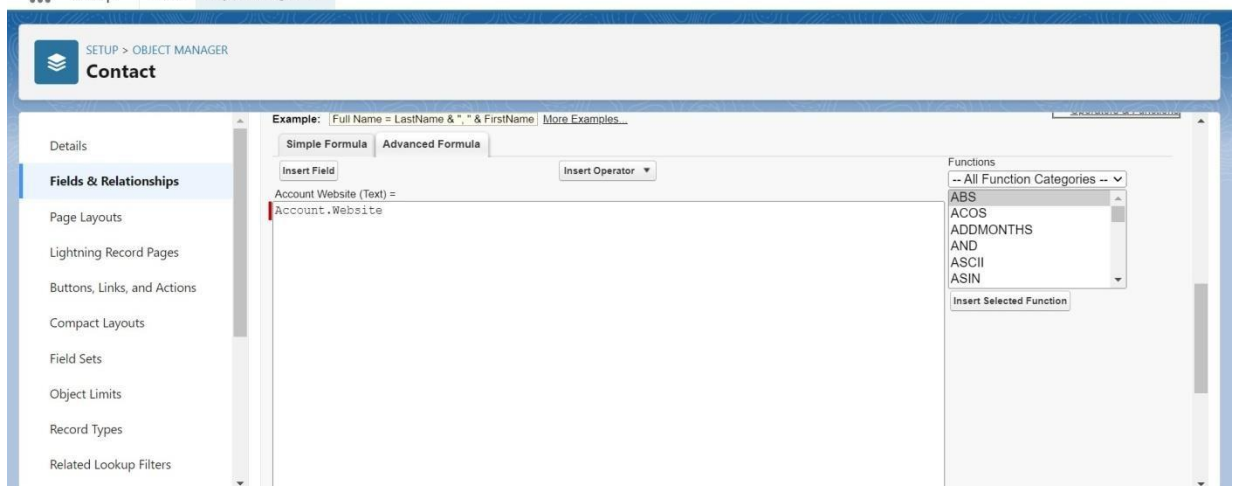
Field Usage

Data Sensitivity Level

Compliance Categorization

Available: PII, HIPAA, GDPR

Chosen:



SETUP > OBJECT MANAGER
Contact

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters

Simple Formula Advanced Formula

Example: Full Name = LastName & ", " & FirstName More Examples

Insert Field
Account.Website

Insert Operator

Functions: -- All Function Categories --
ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN
Insert Selected Function

- 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 :

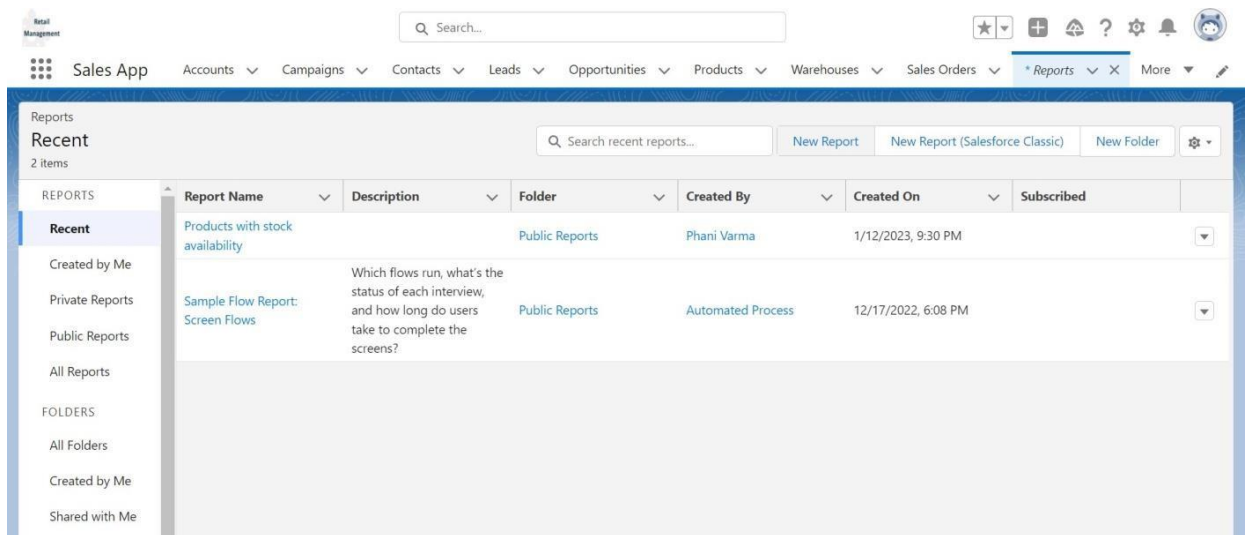
A report is a list of records that meet the criteria you define. It's displayed in Salesforce in rows and columns, and can be filtered, grouped, or displayed in a graphical chart. Every report is stored in a folder. Folders can be public, hidden, or shared, and can be set to read-only or read/write.

Activity:

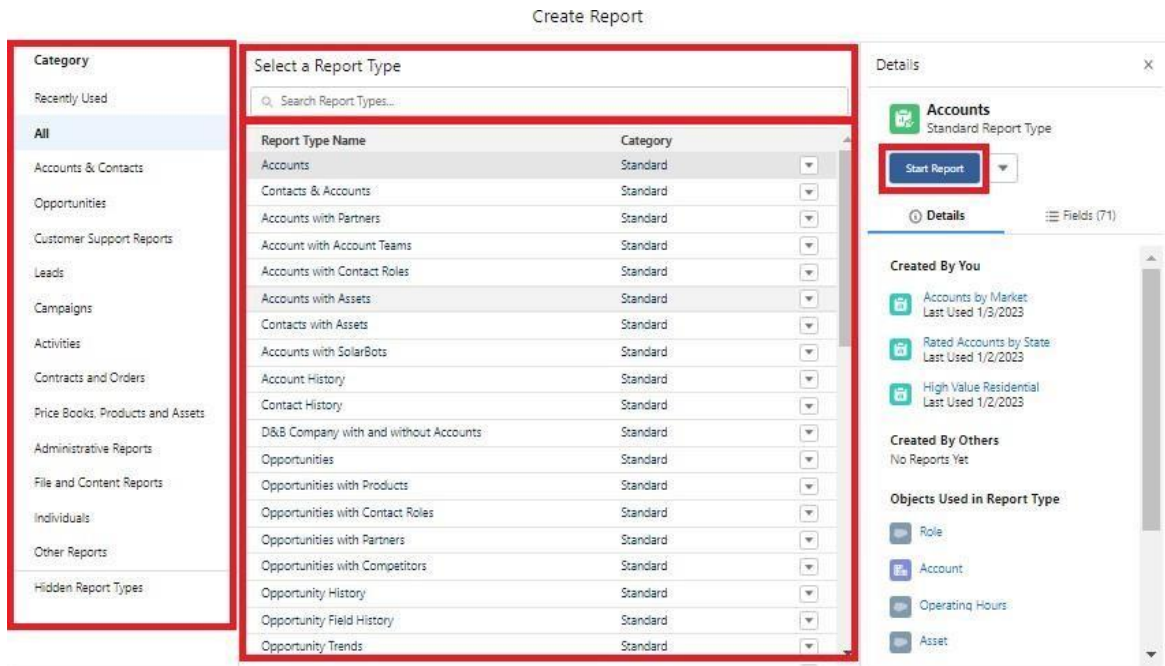
Creation of report

Note- While creation of report ensure that update preview automatically is selected which is available at the right side of the report page.

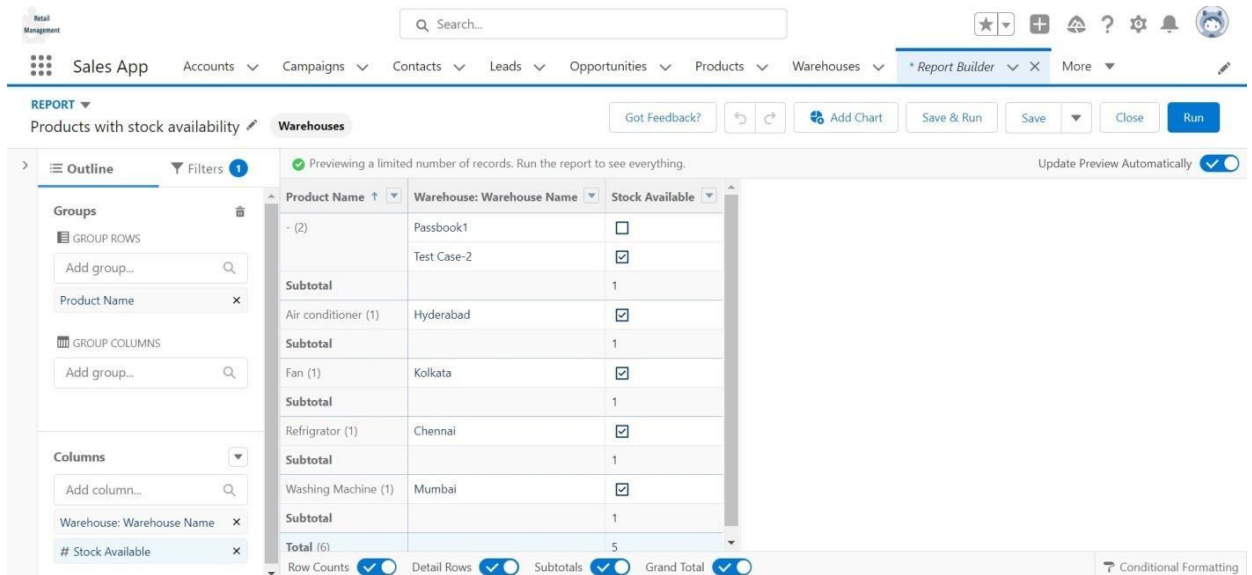
- 1) Click on the app launcher and search for reports.
- 2) And select a new report, for the record type category select other reports.



- 3) Select Warehouses for the report type name.



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.

REPORT
Products with stock availability **Warehouses**

Previewing a limited number of records. Run the report to see everything. Update Preview Automatically

Product Name	Warehouse: Warehouse Name	Stock Available
- (2)	Passbook1	<input type="checkbox"/>
	Test Case-2	<input checked="" type="checkbox"/>
Subtotal		1
Air conditioner (1)	Hyderabad	<input checked="" type="checkbox"/>
Subtotal		1
Fan (1)	Kolkata	<input checked="" type="checkbox"/>
Subtotal		1
Refrigrator (1)	Chennai	<input checked="" type="checkbox"/>
Subtotal		1
Washing Machine (1)	Mumbai	<input checked="" type="checkbox"/>
Subtotal		1
Total (6)		5

Row Counts ☒ Detail Rows ☒ Subtotals ☒ Grand Total ☒ Conditional Formatting

10) And give the label name products with stock availability.

11) Click on save and run for saving the report.

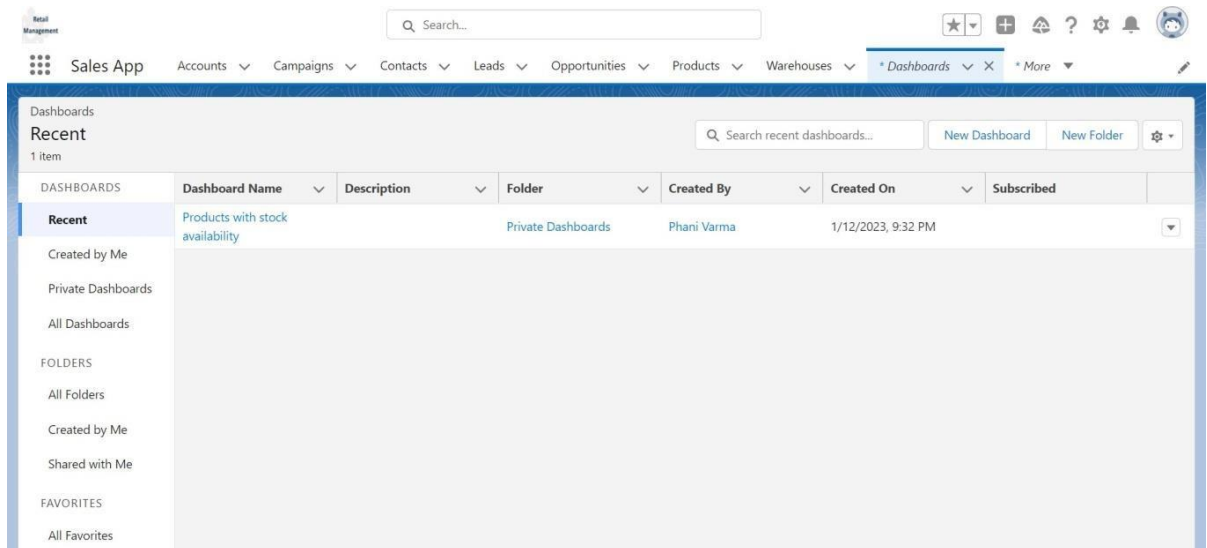
Milestone-8 Dashboards:

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

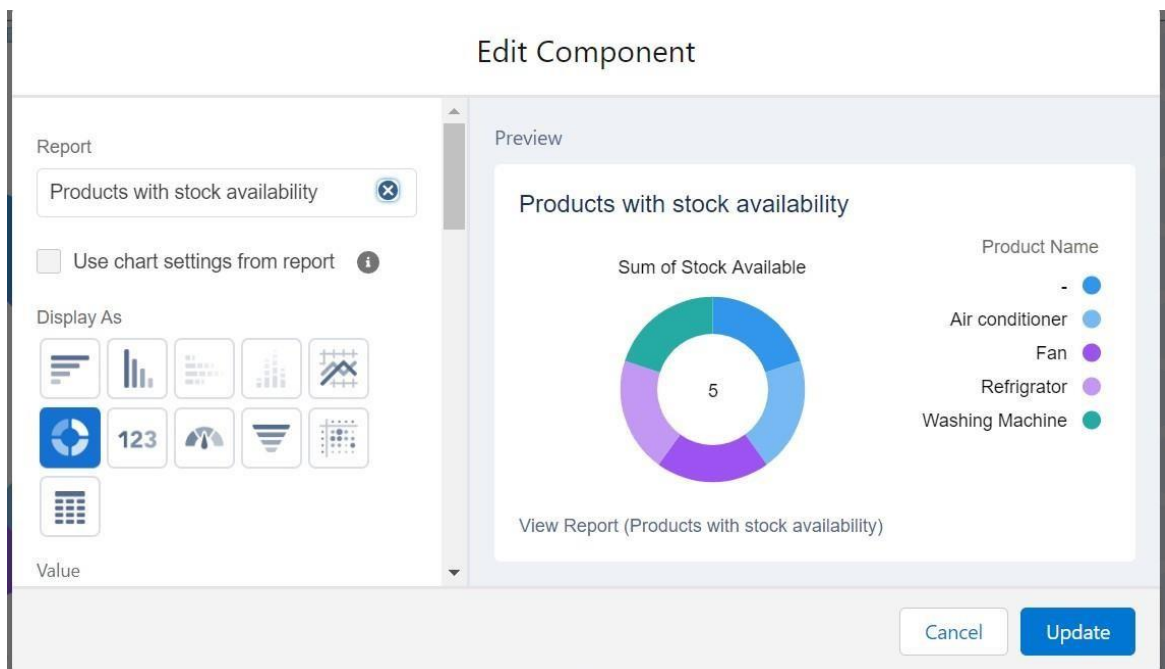
Activity

Creation of Dashboard

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



- 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.



Edit Component

Value

Sliced By


Display Units

☐ Show Values
☐ Show Percentages
☒ Combine Small Groups into "Others"
☒ Show Total

Preview

Products with stock availability

Sum of Stock Available



Product Name

- ●
- Air conditioner ●
- Fan ●
- Refrigrator ●
- Washing Machine ●

View Report (Products with stock availability)

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

Edit Component

Max Values Displayed

Title

Subtitle

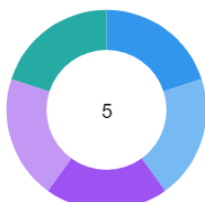
Footer

Legend Position

Preview

Products with stock availability

Sum of Stock Available



Product Name

- ●
- Air conditioner ●
- Fan ●
- Refrigrator ●
- Washing Machine ●

View Report (Products with stock availability)

8) Leave the default values.

9) Click on add.

10) And save the dashboard.

Trailhead Profile Public URL

Team Lead - <https://trailblazer.me/id/rriyas22>

Team Member 1 - <https://trailblazer.me/id/grajam7>

Team Member 2 - <https://trailblazer.me/id/sugu07>

Team Member 3 - <https://trailblazer.me/id/strbh>

CONCLUSION

In conclusion, retail management application using Salesforce is a powerful tool that can help retailers streamline their operations, increase sales, and improve customer satisfaction. It provides a comprehensive view of customer interactions, inventory management, and sales data, enabling retailers to make informed decisions that drive business growth. The application's intuitive interface and customizable features make it easy for retailers to tailor the platform to their specific needs. With Salesforce, retailers can automate manual processes, reduce costs, and improve efficiency. Overall, retail management application using Salesforce is an excellent investment for retailers looking to stay competitive in today's fast-paced retail environment.

FUTURE SCOPE

The future scope of retail management application using Salesforce is promising, as it continues to evolve and adapt to the changing needs of retailers. Here are some potential areas of growth:

1. Artificial Intelligence (AI) and Machine Learning (ML): Retailers can leverage AI and ML to analyze customer data, predict buying behavior, and personalize the shopping experience. Salesforce's Einstein AI already offers these capabilities, and we can expect more advanced features in the future.
2. Mobile-first approach: As mobile devices become the primary mode of shopping for many consumers, retail management applications using Salesforce will need to prioritize mobile functionality. This includes mobile-friendly interfaces, push notifications, and location-based services.
3. Social media integration: Social media has become an essential part of the retail experience, and retailers need to integrate their social media channels with their retail management applications. Salesforce already offers social media integration, but we can expect more advanced features in the future.
4. Omni-channel retailing: Retailers need to provide a seamless shopping experience across all channels, including online, in-store, and mobile. Salesforce's retail management application already supports omni-channel retailing, but we can expect more advanced features in the future.
5. Sustainability: Consumers are increasingly concerned about sustainability, and retailers need to incorporate sustainable practices into their operations. Retail management applications using Salesforce can help retailers track their sustainability initiatives and communicate them to customers.

Overall, the future scope of retail management application using Salesforce is bright, as it continues to innovate and adapt to the changing needs of retailers and consumers.