

RETAIL MANAGEMENT APPLICATION USING SALESFORCE

DATE	APR
TEAM ID	NM2023TMID03864
PROJECT NAME	Retail Management Application Using Salesforce
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TEAM MEMBER	THARA B SANTHOSH B SOWMIYA G

Retail Management Application Using Salesforce

1. INTRODUCTION

1.1 Overview

Retailing encompasses the business activities involved in selling goods and services to

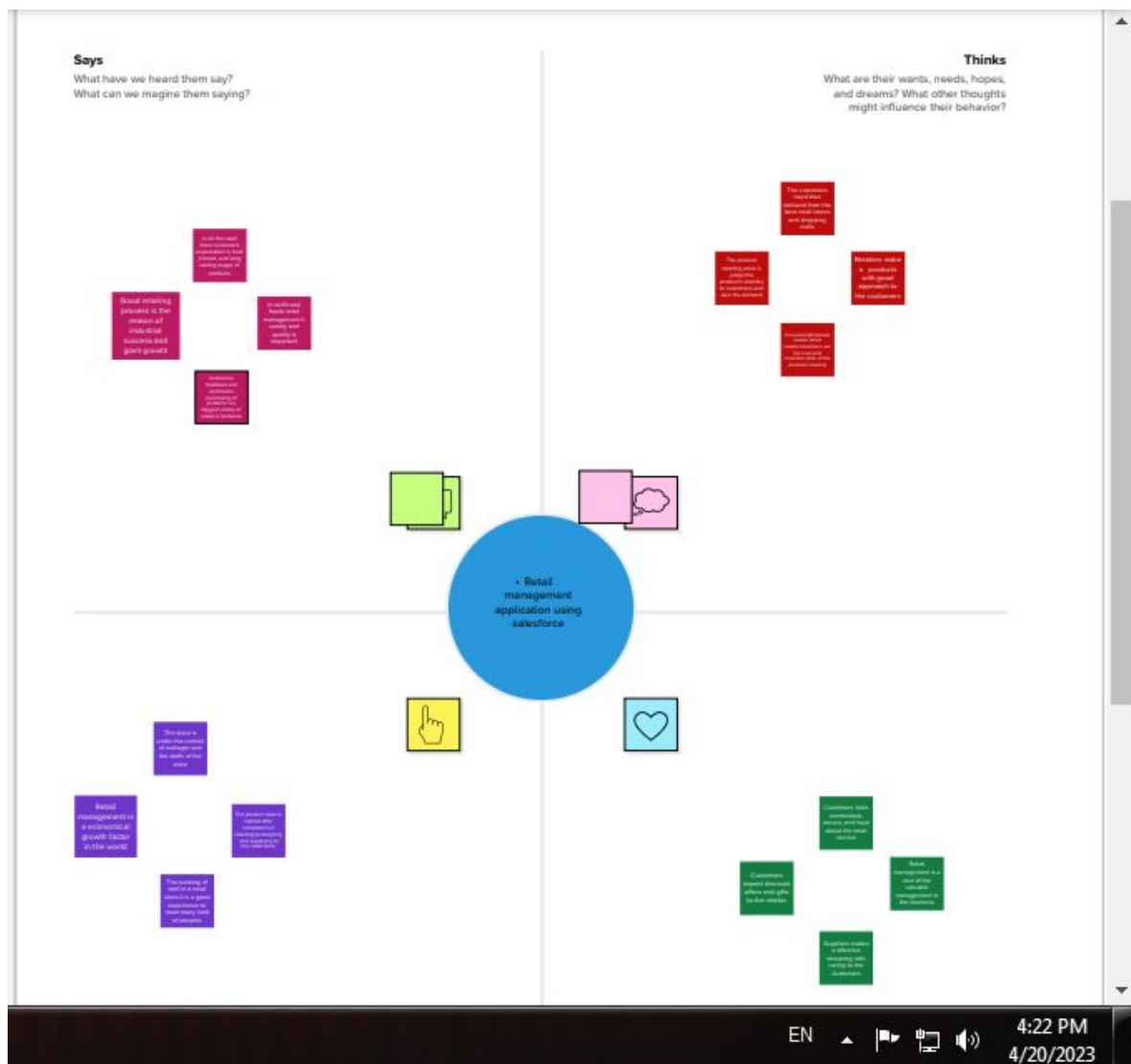
consumers for their personal, family, or household etc. A CRM product owner has requested to

create two applications, one is a sales app for sales reps to use this application and store customer data.

1.2 PURPOSE

Help retailers streamline all the processes of running a store, from procurement to sales and back-office activities such as accounting and human resources. Such an integrated platform provides a single source of truth for all retail data and can improve collaboration between various departments

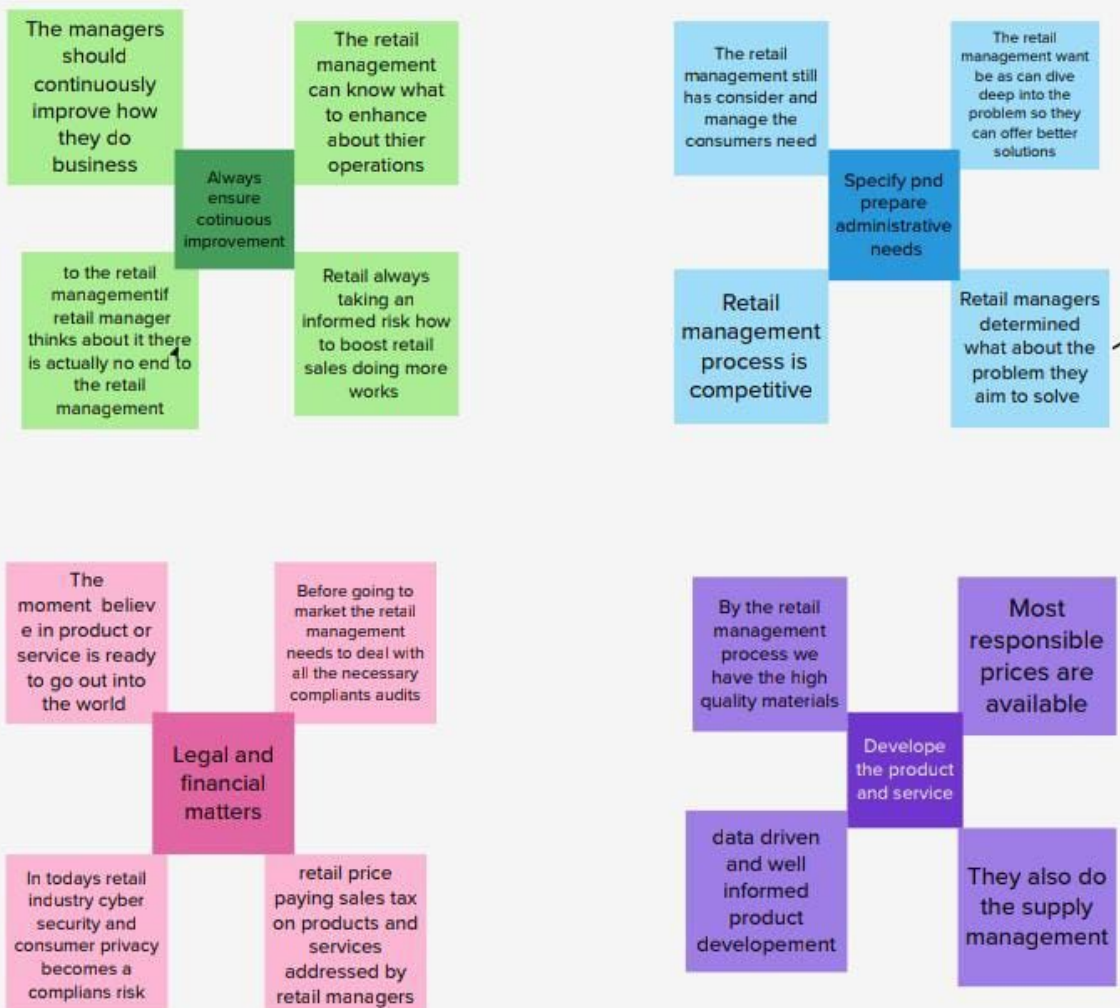
EMPATHY MAP



Group ideas

Take turns sharing your ideas while clustering similar or related notes sticky notes have been grouped, give each cluster a sentence-like label bigger than six sticky notes, try and see if you can break it into smaller

🕒 20 minutes



RESULT

3.1 Data Model

Object Name	Fields in the Object	
	Field Label	Date Type
Job Posting Site	Status	URL
	Technical Site	URL
	Description	URL
	Job Posting Site URL	URL
	Phone Number	Phone
Review	-	-

ACTIVITY AND SCREENSHOT

MILESTONE 1

Create a new repository

A repository contains all project files, including the revision history. Already have a project repository elsewhere?
[Import a repository.](#)

Owner * thowfika-rani03 / nanagement application use salas ✓

Great repository names are short. Your new repository will be created as retail-management-application-use-salas.

Description (optional)

☒ Public
Anyone on the internet can see this repository. You choose who can commit.

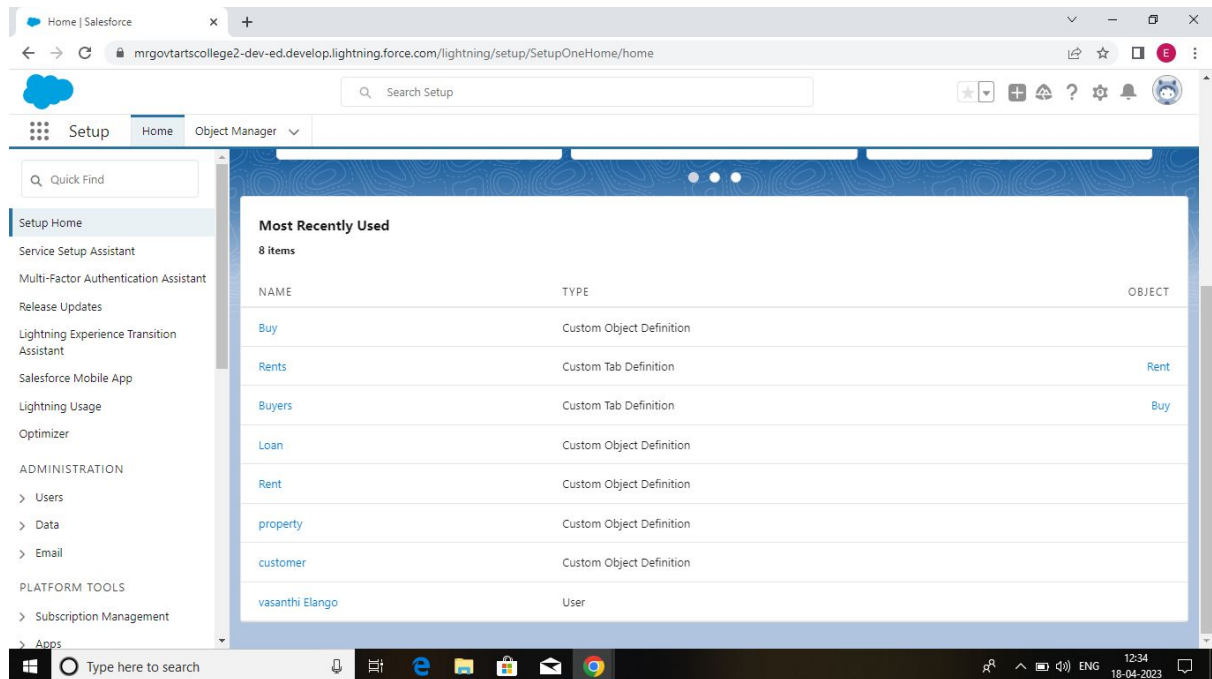
☐ Private
You choose who can see and commit to this repository.

Initialize this repository with:
Skip this step if you're importing an existing repository.

☐ Add a README file
This is where you can write a long description for your project. [Learn more.](#)

Add additional files

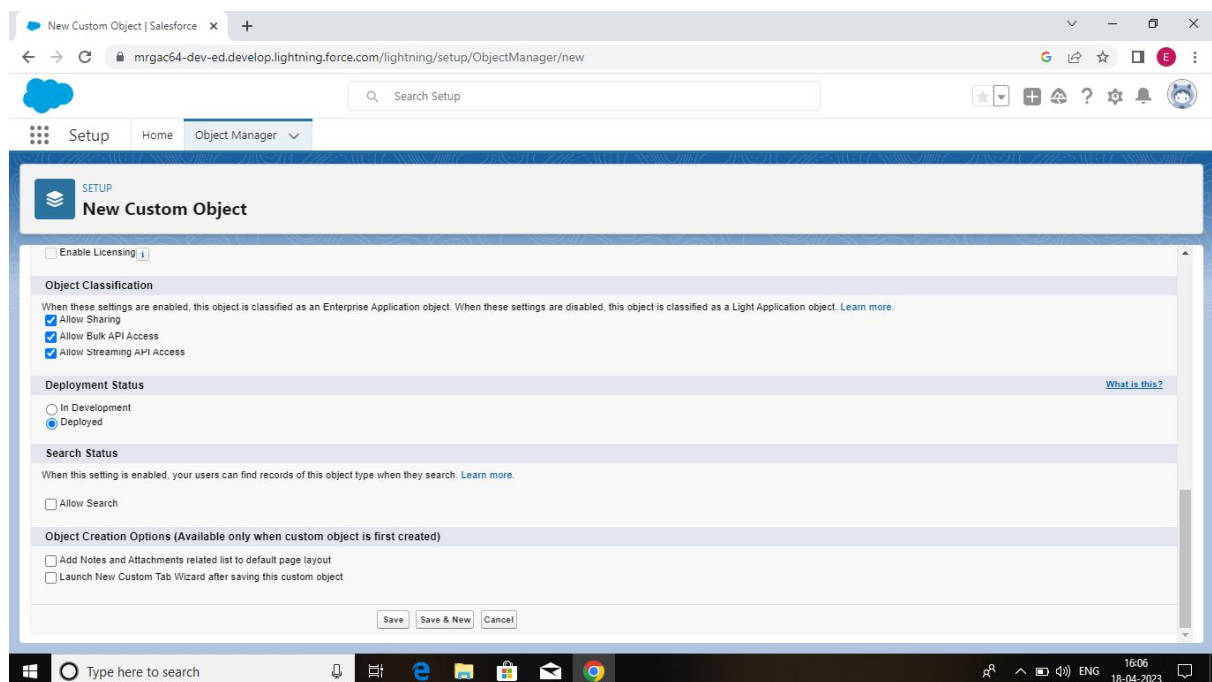
MILESTONE 2



The screenshot shows the Salesforce Setup Home page. The left sidebar contains a 'Quick Find' search bar and a list of setup categories: Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION (Users, Data, Email), PLATFORM TOOLS (Subscription Management, Apps), and a search bar. The main content area is titled 'Most Recently Used' and lists 8 items in a table.

NAME	TYPE	OBJECT
Buy	Custom Object Definition	
Rents	Custom Tab Definition	Rent
Buyers	Custom Tab Definition	Buy
Loan	Custom Object Definition	
Rent	Custom Object Definition	
property	Custom Object Definition	
customer	Custom Object Definition	
vasanthi Elango	User	

MILESTONE 3



The screenshot shows the 'New Custom Object' page in Salesforce Setup. The page is titled 'New Custom Object' and contains several sections for configuring the object.

Enable Licensing

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more.](#)

- ☒ Allow Sharing
- ☒ Allow Bulk API Access
- ☒ Allow Streaming API Access

Deployment Status

[What is this?](#)

- ☐ In Development
- ☒ Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more.](#)

- ☐ Allow Search

Object Creation Options (Available only when custom object is first created)

- ☐ Add Notes and Attachments related list to default page layout
- ☐ Launch New Custom Tab Wizard after saving this custom object

Buttons: Save, Save & New, Cancel

MILESTONE 4

The screenshot shows the Salesforce Setup interface for the 'dispatch/tracking' object. The left sidebar contains a navigation menu with 'Details' selected. The main content area is titled 'Step 5. Add reference field to Page Layouts' and shows a table with the following details:

Field Label	Seller
Data Type	Master-Detail
Field Name	Seller
Description	

Below the table, a message states: 'These are the page layouts that will include this field. Because this is a Master-Detail relationship, the field is required.' A table below this message shows the 'Add Field' and 'Page Layout Name' columns, with a checked box for 'dispatch/tracking Layout'.

The bottom of the screen shows a Windows taskbar with the search bar and various application icons.

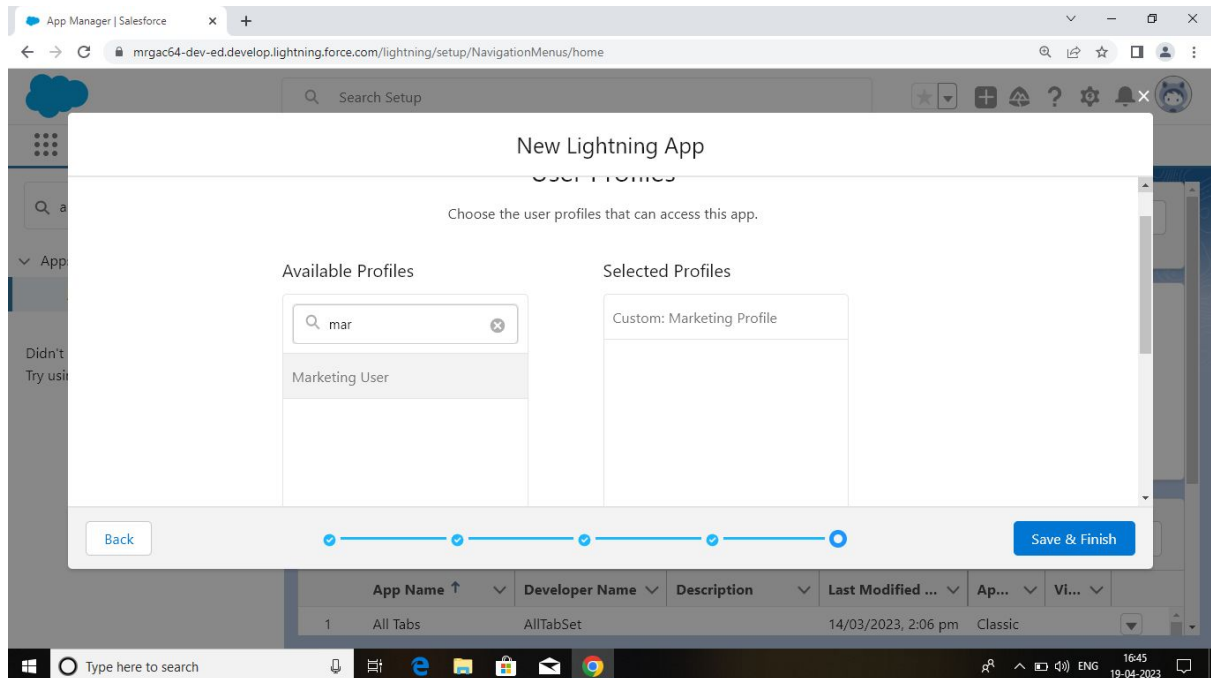
MILESTONE 5

The screenshot shows the Salesforce Setup interface for the 'Display/tracking' object. The left sidebar contains a navigation menu with 'Fields & Relationships' selected. The main content area is titled 'Fields & Relationships' and shows a table with the following details:

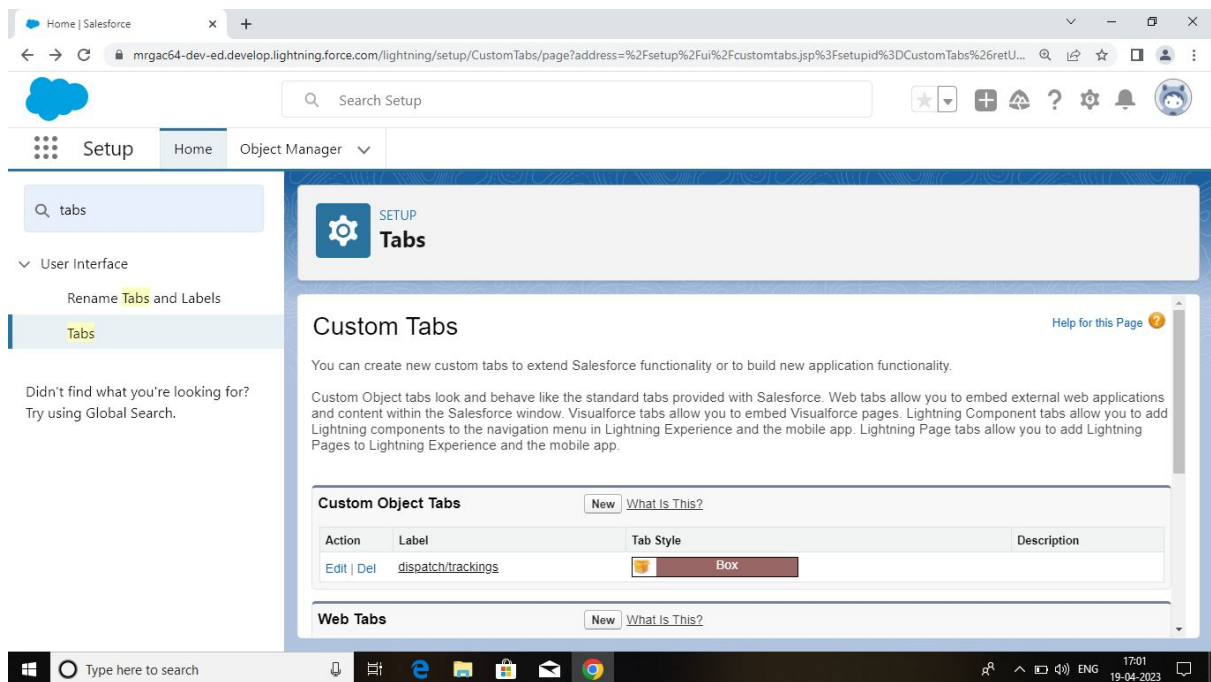
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Display/tracking Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

The bottom of the screen shows a Windows taskbar with the search bar and various application icons.

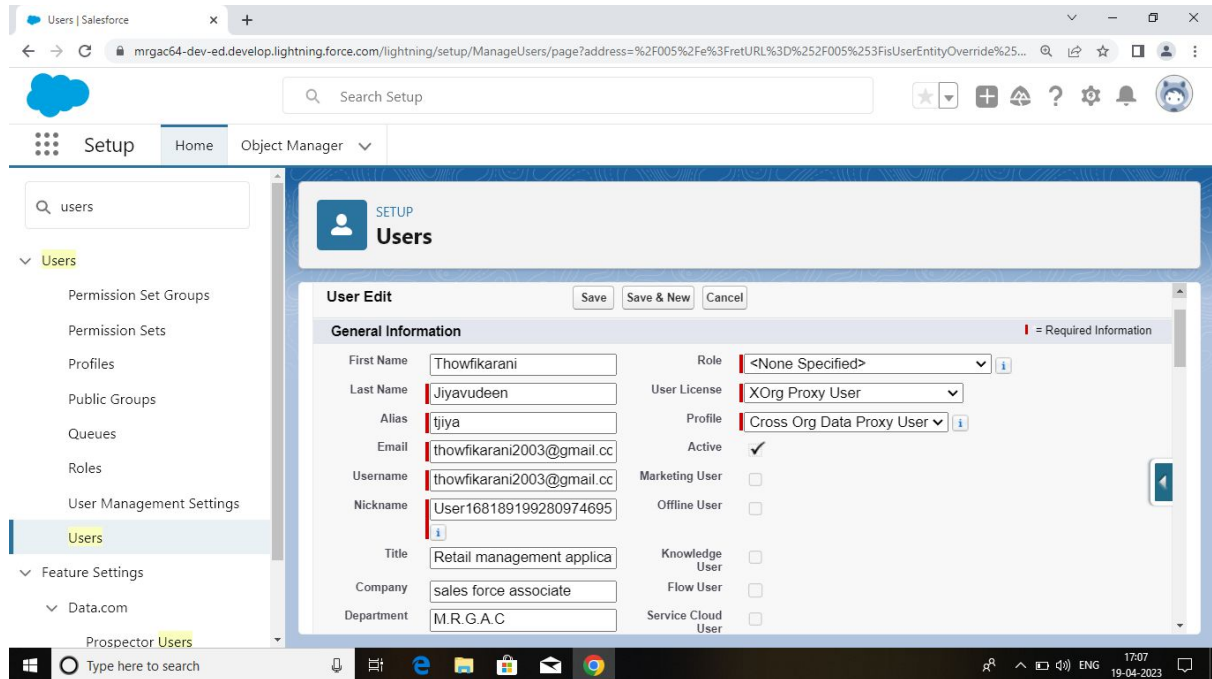
MILESTONE 6



MILESTONE 7



MILESTONE 8



This screenshot shows the Salesforce Setup interface for managing users. The left sidebar contains a navigation menu with options like 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', 'Users', 'Feature Settings', and 'Data.com'. The 'Users' section is selected. The main content area is titled 'Users' and includes a 'User Edit' form. The form has tabs for 'General Information', 'Permissions', and 'Advanced'. The 'General Information' tab is active, showing fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, and Department. It also includes dropdowns for Role, User License, and Profile, and checkboxes for Active, Marketing User, Offline User, Knowledge User, Flow User, and Service Cloud User. The 'Save' button is visible at the top of the form.

Users | Salesforce

mrgac64-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2Fe%3FretURL%3D%252F005%253FisUserEntityOverride%25...

Search Setup

Setup Home Object Manager

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Type here to search

Setup Users

User Edit

Save Save & New Cancel

General Information

First Name Thowfikanani

Last Name Jiyavudeen

Alias tjiya

Email thowfikanani2003@gmail.cc

Username thowfikanani2003@gmail.cc

Nickname User168189199280974695

Title Retail management applica

Company sales force associate

Department M.R.G.A.C

Role <None Specified>

User License XOrg Proxy User

Profile Cross Org Data Proxy User

Active ☒

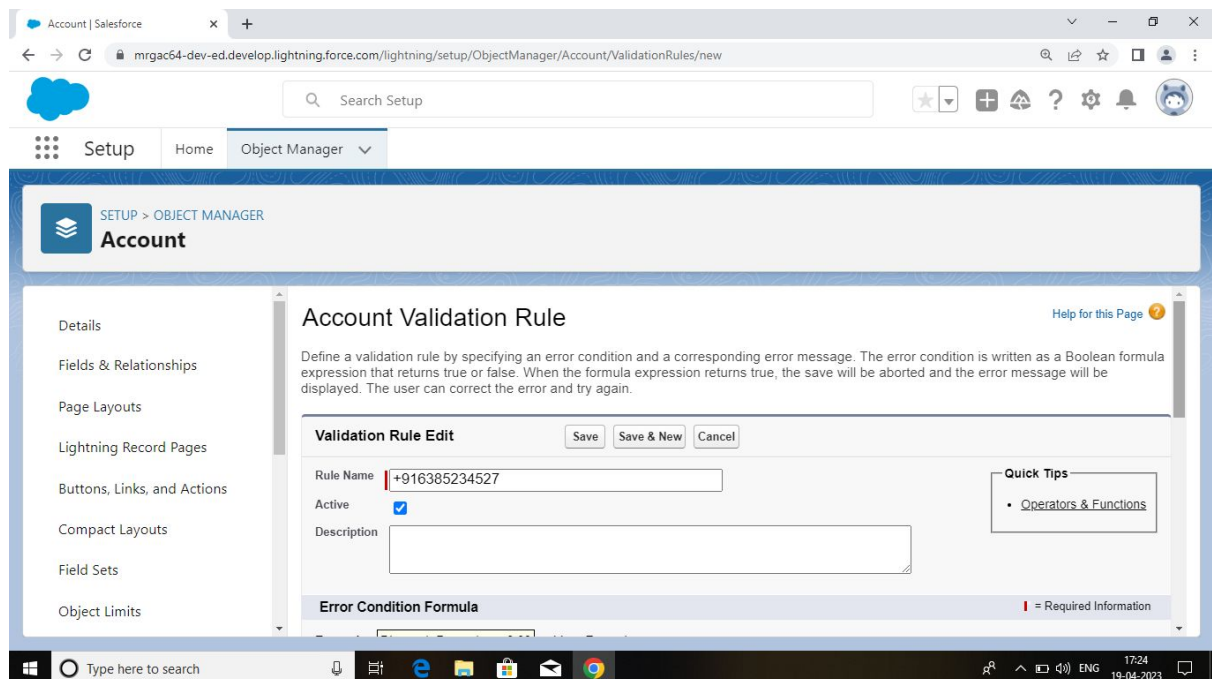
Marketing User ☐

Offline User ☐

Knowledge User ☐

Flow User ☐

Service Cloud User ☐



This screenshot shows the Salesforce Setup interface for creating a new Account Validation Rule. The left sidebar contains a navigation menu with options like 'Details', 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', and 'Object Limits'. The 'Details' section is selected. The main content area is titled 'Account Validation Rule' and includes a 'Validation Rule Edit' form. The form has tabs for 'Details', 'Formula', and 'Advanced'. The 'Details' tab is active, showing fields for Rule Name, Active, and Description. The 'Save' button is visible at the top of the form.

Account | Salesforce

mrgac64-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Account/ValidationRules/new

Search Setup

Setup Home Object Manager

Account

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Account Validation Rule

Define a validation rule by specifying an error condition and a corresponding error message. The error condition is written as a Boolean formula expression that returns true or false. When the formula expression returns true, the save will be aborted and the error message will be displayed. The user can correct the error and try again.

Validation Rule Edit

Save Save & New Cancel

Rule Name +916385234527

Active ☒

Description

Quick Tips

Operators & Functions

Error Condition Formula

Salesforce

mrgac64-dev-ed.develop.lightning.force.com/one/app/eyJjb2w2S1bnREZmVlOiJyZXBvcnRzOnJlcG9ydE1aWxkZXIiLCJhdHRyaWJ1dGVzJjIp7InJlY29yZEIkjoilwiibm...

Search...

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups More

Report: Accounts
New Accounts Report

Enable Field Editing Add Chart Edit

Total Records: 12

	Last Activity	Account Name	Billing State/Province	Type	Rating	Last Modified Date	Account Owner
1	-	GenePoint	CA	Customer - Channel	Cold	14/03/2023	Thowfikarani.Jiyavudeen.A
2	-	United Oil & Gas, UK	UK	Customer - Direct	-	14/03/2023	Thowfikarani.Jiyavudeen.A
3	-	United Oil & Gas, Singapore	Singapore	Customer - Direct	-	14/03/2023	Thowfikarani.Jiyavudeen.A
4	-	Edge Communications	TX	Customer - Direct	Hot	14/03/2023	Thowfikarani.Jiyavudeen.A
5	-	Burlington Textiles Corp of America	NC	Customer - Direct	Warm	14/03/2023	Thowfikarani.Jiyavudeen.A
6	-	Pyramid Construction Inc.	-	Customer - Channel	-	14/03/2023	Thowfikarani.Jiyavudeen.A
7	-	Dickenson plc	KS	Customer - Channel	-	14/03/2023	Thowfikarani.Jiyavudeen.A
8	-	Grand Hotels & Resorts Ltd	IL	Customer - Direct	Warm	14/03/2023	Thowfikarani.Jiyavudeen.A
9	-	Express Logistics and Transport	OR	Customer - Channel	Cold	14/03/2023	Thowfikarani.Jiyavudeen.A
10	-	University of Arizona	AZ	Customer - Direct	Warm	14/03/2023	Thowfikarani.Jiyavudeen.A
11	-	United Oil & Gas Corp.	NY	Customer - Direct	Hot	14/03/2023	Thowfikarani.Jiyavudeen.A
12	-	sforce	CA	-	-	14/03/2023	Thowfikarani.Jiyavudeen.A

To Do List

TRAIL HEAD PROFILE PUBLIC URL

TEAM LEADER - <https://trailblazer.me/id/ajiyavudeen>

TEAM MEMBER –<https://trailblazer.me/id/sbalasubramanian45>

TEAM MEMBER –<https://trailblazer.me/id/ttharab>

TEAM MEMBER –<https://trailblazer.me/id/sgunasekarans>

Retail Management Application Using Salesforce

Advantages and Disadvantages

!Enhanced Sales Competence.

!Develop Leadership Skills.

!High Marketing Cost

!Selling Skill Required

APPLICATIONS

store customer data, which the retailer can then use to reach out to customers via email with personalized offers

CONCLUSION

- ✓ To enhance the efficiency of the app.

FUTURE SCOPE

- ✓ In the 21st century each and every field is computerized and all works are done by using the modern technologies so it has a good future.