

Project Report Template

1. INTRODUCTION

1.1 Overview

The retail management application using salesforce is the project title of that we are done. We given a detailed report that we are done by a team.

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

1.2 Purpose

- * Retailing encompasses the business activities involved in selling goods and services to consumers for their personal, family, or household etc.
- * 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
- * Salesforce can be used to manage orders from retail including tracking orders, processing payments

2. Problem Definition & Design Thinking

2.1 Empathy Map

An empathy map is a collaborative tool teams .It can use to gain a deeper insight into their customers .The empathy map was originally created by Dave Gray and has gained much popularity within the agile community

Template

Empathy map

Use this framework to develop a deep, shared understanding and empathy for other people. An empathy map helps describe the aspects of a user's experience, needs and pain points, to quickly understand your users' experience and mindset.

Says
What does she/he say?
What does she/he think/say?

This app uses to know stocks of the products to buy

It is in low prices and high quality

They needs to home delivery the buying products

They thoughts the products are good to use and products are easy to buy

Thinks
What does she/he wants, needs, expect, and consider? What other things influence her/his behavior?

The daily need products are in front to the app to buy easily

Does
What individual can do/demand?
What does she/he do?

retail management app is very easy to use to buy products

They buys the quality products in low prices

The app does helping customers to find the products in the stores

The people wants to buy the brand products

They feels about the products price but your regular customer you have a discount for that product

They fear about the products expiry date and about warranty card of the products

Feels
What does she/he feel, like, think, and selected? What she/he has been influenced by?

Share template feedback

Need some inspiration?
See a finished version of this template to illustrate your work.
[Open example →](#)

→ → → →

2.2 Ideation & Brainstorming Map

Brainstorming is a group solving method that involves the spontaneous contribution of creative ideas and solutions.

1 Define your problem statement

What problem are you trying to solve? Frame your problem as a How Might We statement. This will be the focus of your brainstorm.

⌚ 5 minutes

2 Brainstorm

Write down any ideas that come to mind that address your problem statement.

⌚ 10 minutes

TIP
You can select a sticky note and hit the pencil (edit) or sketch (icon) icon to start drawing!

The User and benefits for Retail Management Application Using salesforce

Key rules of brainstorming
To run a smooth and productive session

- Stay in topic.
- Defer judgment.
- Go for volume.
- Encourage wild ideas.
- Listen to others.
- If possible, be visual.

Premkumar S

The retail Management application uses to increase the customer satisfaction and to sell more products to the customers but it also increases the profits of the app users.

Depending on your needs, you need to solve problems if you have a strong working technical background. You can gain more technical knowledge from team members with additional coursework, training or practice.

Such sessions also help the team think from a different perspective from different team members within the organization.

Rajkumar B

The app is easy to install and use in retail Management for the retailers to control their inventories in the marketplace, shoppe etc.

monitor the status of the stock and have decided to push through, if it does not work, you can always ones you have in hand and search for positive results.

Dhanush P

Such sessions also help the team think from a different perspective from different team members within the organization.

Try to pinpoint the affected areas and come up with the necessary solutions

Such sessions also help the team think from a different perspective from different team members within the organization.

you can use your sales knowledge and experience to train your sales associates and help them develop better sales techniques

Lokesh S

Idea to make sure the best product is in the market to buy in the app

A framework consists of all the potential solutions to the problem that you and your employees face

you can use your sales knowledge and retail experience to train your sales associates and help them develop better sales techniques

If you are genuinely interested in the company's products or services before you can start selling them, use the Employees value proposition to keep them highly motivated and successful employees.

Dhanush A

Such sessions also help the team think from a different perspective from different team members within the organization.

This exercise trains people to take up responsibilities that were beyond my job description

Try to pinpoint the affected areas and come up with the necessary solutions

The app gives the customers services if any problems faced by products.

3 Group Ideas

Take turns sharing your ideas while clustering similar or related notes as you go. Once all sticky notes have been grouped, glue each cluster to a sentence-like label. If a cluster is bigger than six sticky notes, try and see if you can break it up into smaller sub-groups.

⌚ 20 minutes

4 Prioritize

Your team should all be on the same page about what's important moving forward. Patch your ideas on the grid to determine which ideas are important and which are feasible.

⌚ 20 minutes

TIP
And make sure that the ideas are aligned with the mission and vision of the company.

After you collaborate

You can export the mural as an image or pdf to share with members of your company who might find it helpful.

Quick add-ons

- Show the mural**
Share a view link to the mural with stakeholders to keep them in the loop about the decisions of the business.
- Export the mural**
Export a copy of the mural as a PNG or PDF to attach to emails, documents, or save it for later.

Keep moving forward

- Design blueprint**
Define the components of a new idea or plan.
Open the template →
- Customer experience journey map**
Map out the customer's touchpoints, interactions, and obstacles to an experience.
Open the template →
- Strengths, weaknesses, opportunities & threats**
SWOT analysis for strengths, weaknesses, opportunities, and threats (SWOT) to develop a plan.
Open the template →

TIP
Importing the mural into a mural editor like Mural or Miro can help you quickly identify and fix any issues that may arise during the process.

Importance

Importance
Rank all the ideas based on how important they are to the company and what would have the most impact?

Feasibility

Feasibility
Determine if the ideas are feasible and how likely they are to succeed. Consider the resources available and the timeline required.

3. RESULT

3.1 Data Model:

Object name	Fields in the Object												
Display/tracking	<table border="1"><thead><tr><th>Field label</th><th>Data type</th></tr></thead><tbody><tr><td>Display/tracking Name</td><td>Text (80)</td></tr><tr><td>Dispatched</td><td>Checkbox</td></tr><tr><td>Expected date of delivery</td><td>Date</td></tr><tr><td>Sales order</td><td>Master- Detail(Sales order)</td></tr><tr><td>Tracking id</td><td>Auto Number</td></tr></tbody></table>	Field label	Data type	Display/tracking Name	Text (80)	Dispatched	Checkbox	Expected date of delivery	Date	Sales order	Master- Detail(Sales order)	Tracking id	Auto Number
Field label	Data type												
Display/tracking Name	Text (80)												
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Sales order Name	Text (80)												

Warehouse	<table border="1"> <thead> <tr> <th>Field label</th><th>Data type</th></tr> </thead> <tbody> <tr> <td>Product Name</td><td>Text (25)</td></tr> <tr> <td>Stock Available</td><td>Checkbox</td></tr> <tr> <td>Warehouse Name</td><td>Text (80)</td></tr> </tbody> </table>	Field label	Data type	Product Name	Text (25)	Stock Available	Checkbox	Warehouse Name	Text (80)
Field label	Data type								
Product Name	Text (25)								
Stock Available	Checkbox								
Warehouse Name	Text (80)								
Account	<table border="1"> <thead> <tr> <th>Field label</th><th>Data type</th></tr> </thead> <tbody> <tr> <td>Phone number has International format</td><td>Phone number must begin with + (country code)</td></tr> <tr> <td></td><td></td></tr> </tbody> </table>	Field label	Data type	Phone number has International format	Phone number must begin with + (country code)				
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Warehouse	<table border="1"> <thead> <tr> <th>Field label</th><th>Data type</th></tr> </thead> <tbody> <tr> <td>Account Website</td><td>Formula(text)</td></tr> </tbody> </table>	Field label	Data type	Account Website	Formula(text)				
Field label	Data type								
Account Website	Formula(text)								

3.2 Activity & Screenshot

ACTUVITY:1 [Dispatch/tracking]

Dispatch/ tracking is created for users to track the packages they order the product

The screenshot shows the Salesforce Setup interface with the following details:

Object Manager: Dispatch/tracking

Details (Left sidebar):

- 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

Details (Main pane):

Description	
API Name	Dispatch_tracking__c
Custom	✓
Singular Label	Dispatch/tracking
Plural Label	Dispatch/trackings
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Edit and **Delete** buttons are located at the top right of the main pane.

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Object Manager: Dispatch/tracking

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- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout

Fields & Relationships (Main pane):

7 items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
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)		✓
Treaking_Id	Treaking_Id__c	Auto Number		

ACTIVITY 2: [Dispatched]

Object Manager

Dispatched

Details

Description

API Name
Dispatched__c

Custom
✓

Singular Label
Dispatched

Plural Label
Dispatcheds

Enable Reports
✓

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings

Standard salesforce.com Help Window

Edit **Delete**

Object Manager

Dispatched

Fields & Relationships

4 Items, Sorted by Field Label

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

ACTIVITY 3: [Expected date of delivery]

Object Manager

Expected date of delivery

Details

Description

API Name
Expected_date_of_delivery__c

Custom
✓

Singular Label
Expected date of delivery

Plural Label
Expected date of deliveries

Enable Reports
✓

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings

Standard salesforce.com Help Window

Edit **Delete**

SETUP > OBJECT MANAGER

Expected date of delivery

Details

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

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Expected date of delivery	Expected_date_of_delivery_c	Date		
Expected date of delivery Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

ACTIVITY 4: [Tracking ID]

SETUP > OBJECT MANAGER

Tracking Id

Details

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

Description	API Name Tracking_Id_c Custom ✓ Singular Label Tracking Id Plural Label Tracking Ids	Enable Reports ✓ Track Activities
Track Field History		
Deployment Status Deployed		
Help Settings Standard salesforce.com Help Window		

Edit Delete

The screenshot shows the Salesforce Setup interface with the following details:

- Header:** Includes links for Home, Object Manager, and various system icons.
- Breadcrumbs:** SETUP > OBJECT MANAGER > Tracking Id
- Left Sidebar:** Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout.
- Table:** Fields & Relationships (4 items, Sorted by Field Label).

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

Activity 5: [sales order]

The screenshot shows the Salesforce Setup interface with the following details:

- Header:** Includes links for Home, Object Manager, and various system icons.
- Breadcrumbs:** SETUP > OBJECT MANAGER > Sales Order
- Left Sidebar:** Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout.
- Form:** Details for the Sales Order object.

Description	Enable Reports ✓
API Name Sales_Order__c	Track Activities
Custom ✓	Track Field History
Singular Label Sales Order	Deployment Status Deployed
Plural Label Sales Orders	Help Settings Standard salesforce.com Help Window

Sales Order

Fields & Relationships
4 Items, Sorted by Field Label

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

Activity 6: [warehouse]

warehouse

Details

Description	Enable Reports
API Name warehouse__c	✓
Custom	✓
Singular Label warehouse	✓
Plural Label warehouses	✓
Deployment Status Deployed	
Help Settings	
Standard salesforce.com Help Window	

warehouse

Fields & Relationships
6 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)	✓	
Product name	Product_name__c	Text(25)	▼	
Stock available	Stock_available__c	Checkbox	▼	
warehouse Name	Name	Text(80)	✓	▼

Activity 7: [Account]

The screenshot shows the Salesforce Setup interface for the Account object. The left sidebar lists various configuration options like Details, Fields & Relationships, Page Layouts, etc. The main content area is titled 'Validation Rules' and displays one item: 'Phone_number_has_internation_format' (Rule Name), 'Phone' (Error Location), 'Phone number must begin with + (country code)' (Error Message), Active (checked), and modified by 'prem kumar, 31/03/2023, 7:08 am'.

Activity 8: [Contact]

The screenshot shows the Salesforce Setup interface for the Contact object. The left sidebar lists various configuration options like Details, Fields & Relationships, Page Layouts, etc. The main content area is titled 'Fields & Relationships' and displays a list of fields: Account Name (Accountid, Lookup(Account)), Account Website (Account_Website__c, Formula (Text)), Assistant (AssistantName, Text(40)), Asst. Phone (AssistantPhone, Phone), Birthdate (Birthdate, Date), Clean Status (CleanStatus, Picklist), Contact Owner (Ownerid, Lookup(User)), Created By (CreatedById, Lookup(User)), Data.com Key (Jigsaw, Text(20)), Department (Department, Text(20)).

Activity 9: [User]

The screenshot shows the Salesforce Setup interface with the following details:

- Setup** button in the top left.
- Search bar: Search Setup.
- Top right icons: Home, Object Manager, and various system status indicators.
- Left sidebar navigation under **Users**:
 - Permission Set Groups
 - Permission Sets
 - Profiles
 - Public Groups
 - Queues
 - Roles
 - User Management Settings**
 - Users** (selected)
 - Feature Settings
 - Data.com
 - Prospector **Users**
 - User Interface
 - Action Link Templates
 - Actions & Recommendations
- Main content area: **SETUP Users**. The **User Detail** section shows the following information for a user named Premkumar S:

	Name	Premkumar S	Role
Alias	ps	User License	Salesforce
Email	premsivakumar007@gmail.com	Profile	Standard User
Username	007spk@123.com	Active	<input checked="" type="checkbox"/>
Nickname	User1680194616734595947	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	<input type="checkbox"/>
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/>
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/>
App Registration: One-Time Password Authenticator	<input type="checkbox"/>	Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>

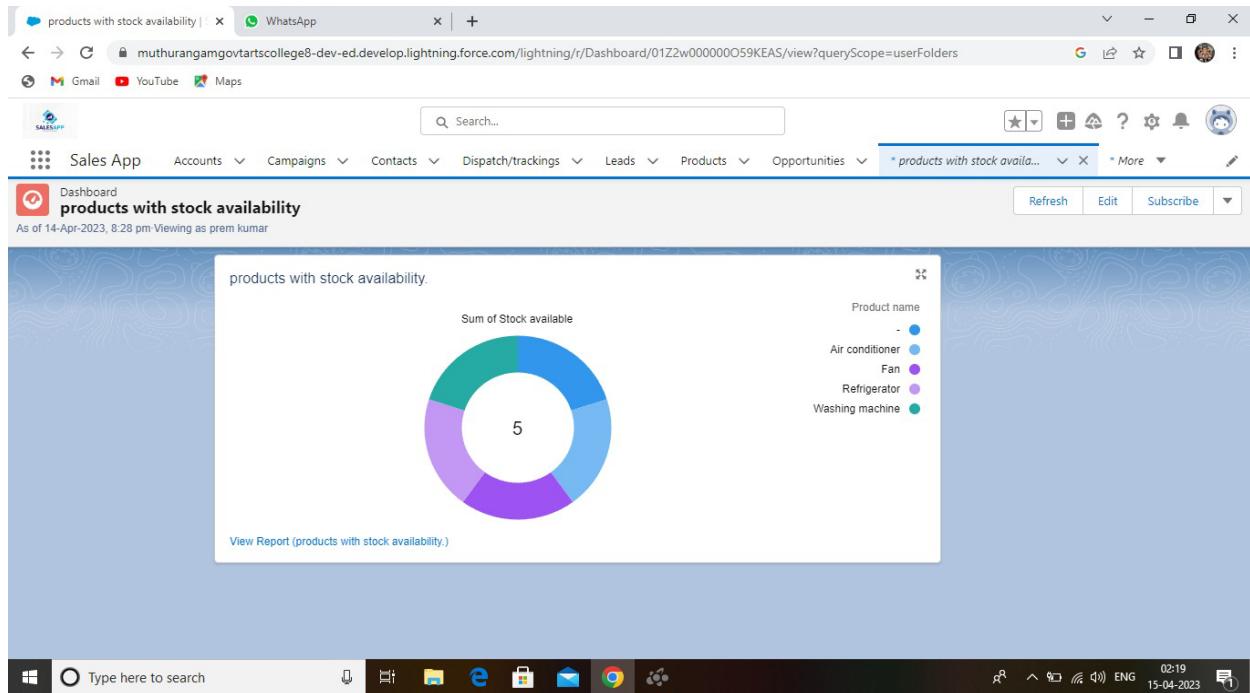
Activity 10: [Reports]

The screenshot shows the Salesforce Sales App interface with the following details:

- Sales App** button in the top left.
- Search bar: Search...
- Top right icons: Home, Object Manager, and various system status indicators.
- Left sidebar navigation under **Sales App**:
 - Accounts
 - Campaigns
 - Contacts
 - Dispatch/tracking
 - Leads
 - Products
 - Opportunities
 - * products with stock availa...
 - More
- Main content area: Report titled "Report: warehouses products with stock availability." The report table shows the following data:

Product name	warehouse: warehouse Name	Stock available
Pastry	Pasbook	<input type="checkbox"/>
	Test Case 2	<input checked="" type="checkbox"/>
Subtotal		1
Air conditioner	Hyderabad	<input checked="" type="checkbox"/>
Subtotal		1
Fan	Kolkata	<input checked="" type="checkbox"/>
Subtotal		1
Refrigerator	Chennai	<input checked="" type="checkbox"/>
Subtotal		1
Washing machine	Mumbai	<input checked="" type="checkbox"/>
Subtotal		1
Total (6)		5
- Bottom controls: Row Counts, Detail Rows, Subtotals, Grand Total.

Activity 11: [Dashboard]



4. Trailhead Profile Public URL

Team Lead - <https://trailblazer.me/id/pkumars64>

Team Member 1 - <https://trailblazer.me/id/rajbalaraman04012003>

Team Member 2 - <https://trailblazer.me/id/lokesh1227626>

Team Member 3 - <https://trailblazer.me/id/dhanush132>

Team Member 4- <http://trailblazer.me/id/dhanushmass9944@gmailcom>

5. ADVANTAGES & DISADVANTAGE

- * Retail management saves time and ensures the customers easily locate their desired merchandise and return home satisfied.
- * The products must be well arranged on the assigned shelves according to size, colour, gender, patterns etc.
- * The retailer must keep a record of all the products coming into the store.

6. DISADVANTAGE

- * **Dealing With Customers** - You are dealing with a lots of customers, so you should put a lot of effort in to the service quality, to be sure that clients are happy
- * **Unpredictable** -There are many factors in retailing so it's hard to predict all of them
- * **Lower Profit Margin**-A large retailer can essentially tell a manufacturer, "We'll buy your product at this price only." The price the retailer sets often results in a lower-than-average profit margin for the manufacturer, which enables the retailer to sell the product for less than smaller retailers.
- * **It's risky** - Because you are buying products in a bulk and you usually can't be sure that you will sell all the products

7. APPLICATIONS

- * Salesforce can be used 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.
- * Salesforce is the world's #1 customer relationship management (CRM) platform.
- * We help your marketing, sales, commerce, service and IT teams work as one from anywhere,so you can keep your customers happy everywhere.

8. CONCLUSION

- * Salesforce for Retail is a set of solutions built on the Salesforce platform designed to help retail companies manage their operations and customer relationships. These solutions include tools for managing inventory, sales, customer data, marketing, and more.

9. FUTURE SCOPE

- * Improvement customer relationship
- * Salesforce Everywhere
- * Big Campanies Hiring
- * Autosales process
- * Better Carrer
- * Better job opportunities.

