

INTRODUCTION

1.1 OVERVIEW :

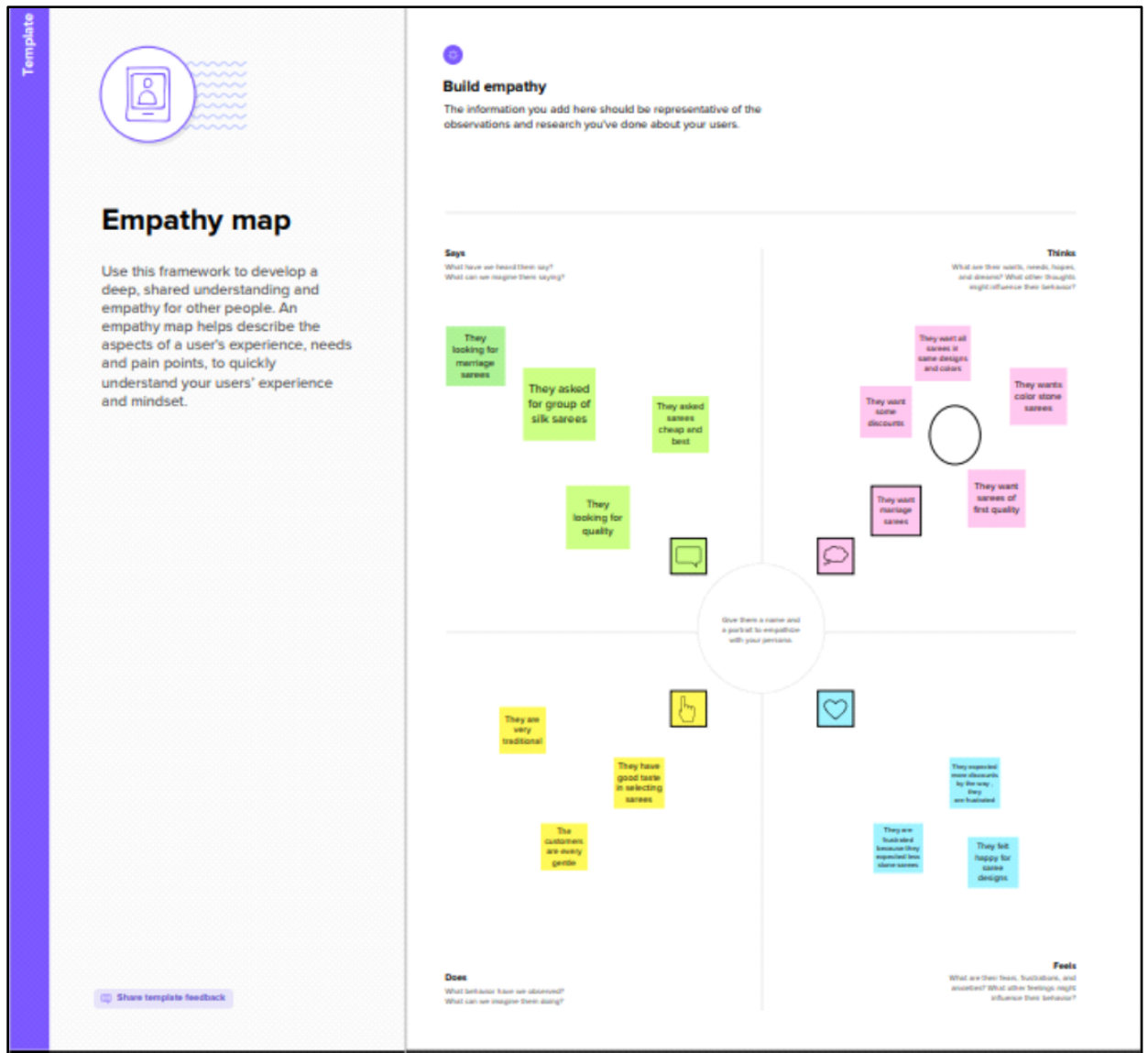
Project descriptions provide the following details to the applicants: the problem the project will address, a set of goals for the project, the overall objectives for the project, as well as a project plan that describes the activities the members will undertake.

1.2 PURPOSE:

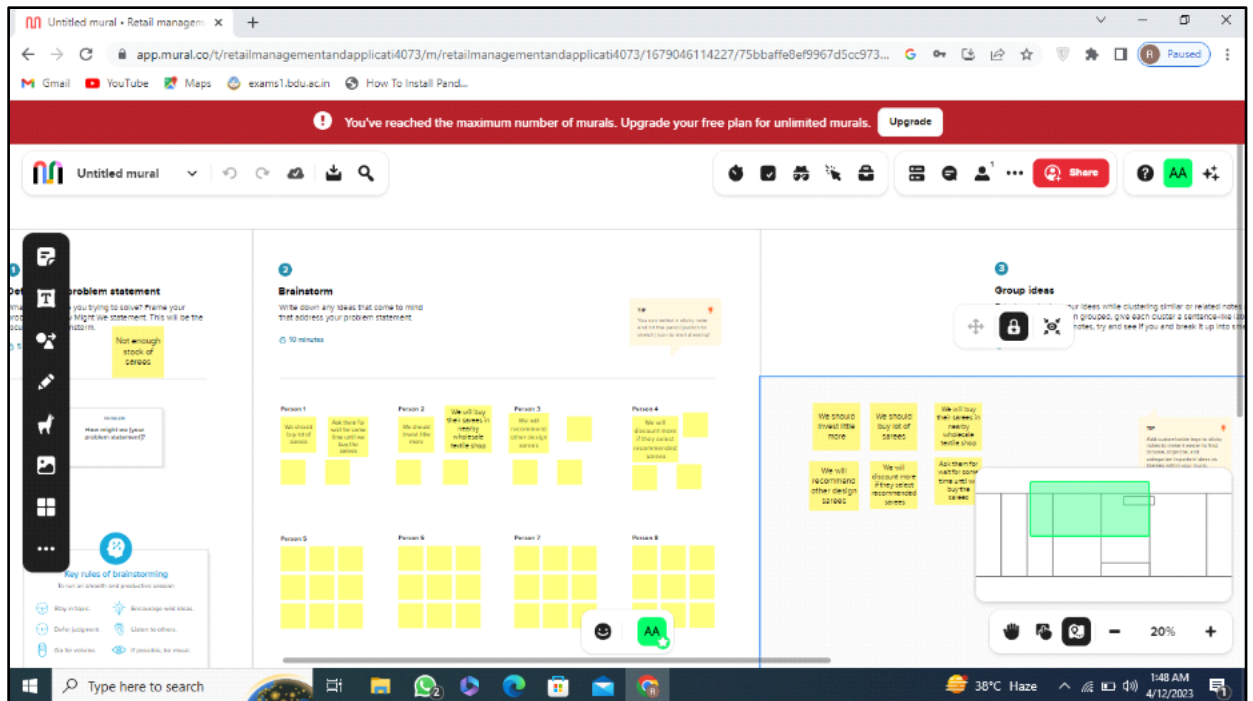
A project's purpose explains the reason for its existence, the meaning of what is done, the ambition or dream pursued by the project or the direction it takes and maintains. The definition of this is essential at three levels: for the project and for all stakeholders.

PROBLEM DEFINITION AND DESIGN THINKING:-

2.1 EMPATHY MAP:



2.2 IDEATION AND BRAIN STORMING MAP:



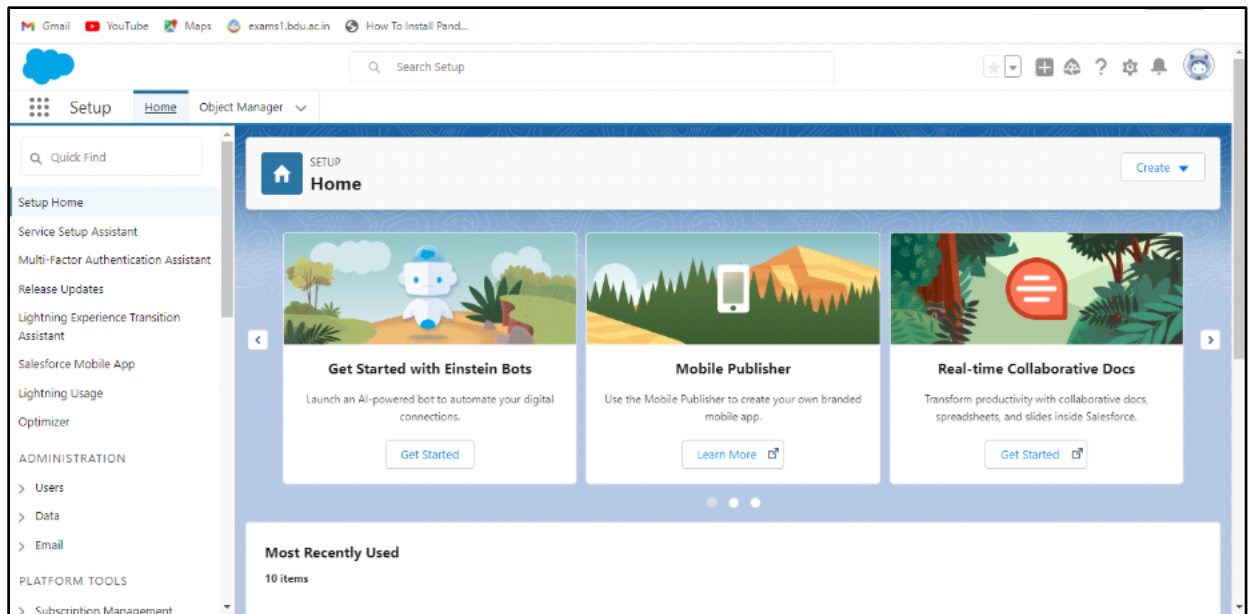
RESULT:-

3.1 DATA MODEL:

Object name	Fields in the object	
Obj 1	Field label	Data type
	Account Name	Text(80)
	Contact Name	Text(80)
Obj 2	Field label	Data type
	Campaign name	Text(80)
	Case Name	Text(80)

3.2 ACTIVITY AND SCREENSHOT:-

MILESTONE-1:-

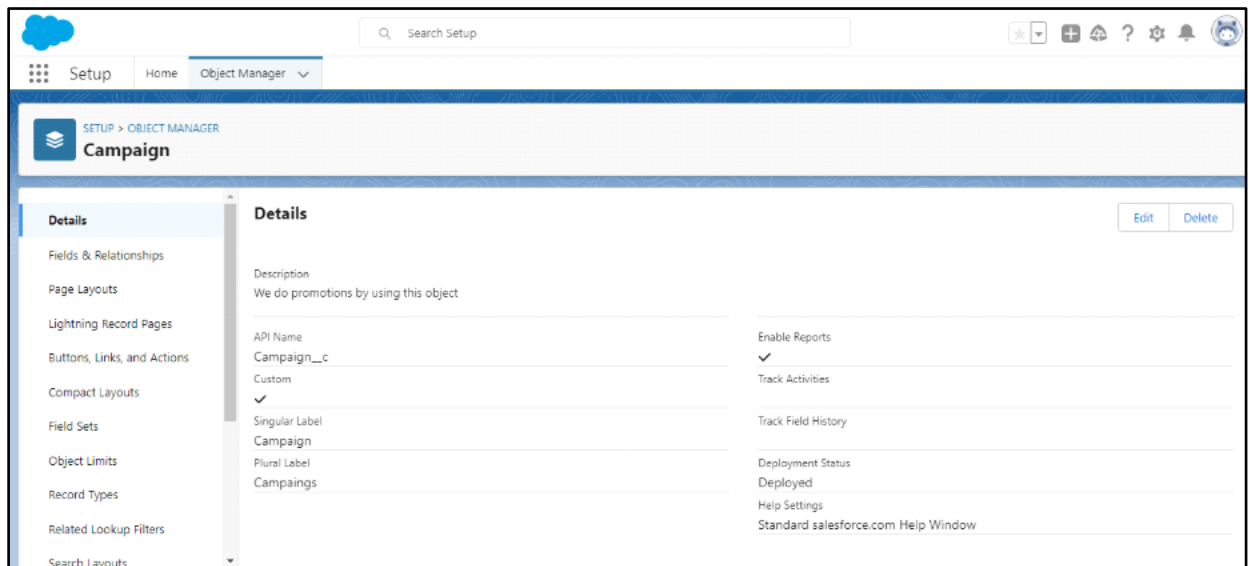


descr:

>>> First of all i open my salesforce account. And goes to HOME page it's shown above.

MILESTONE-2 OBJECTS:-

CAMPAIGN:



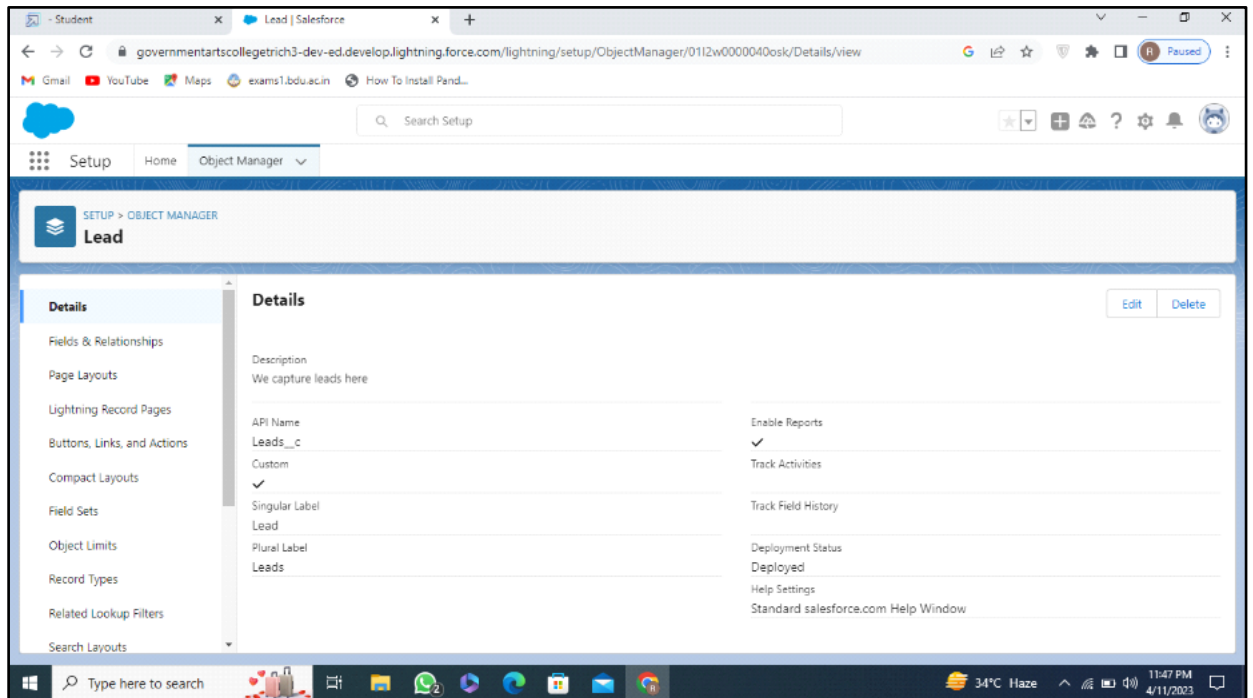
descr:

>>> Navigate to setup and select object manager.

>>> At the top of the right.

>>> We do promotion by using this object

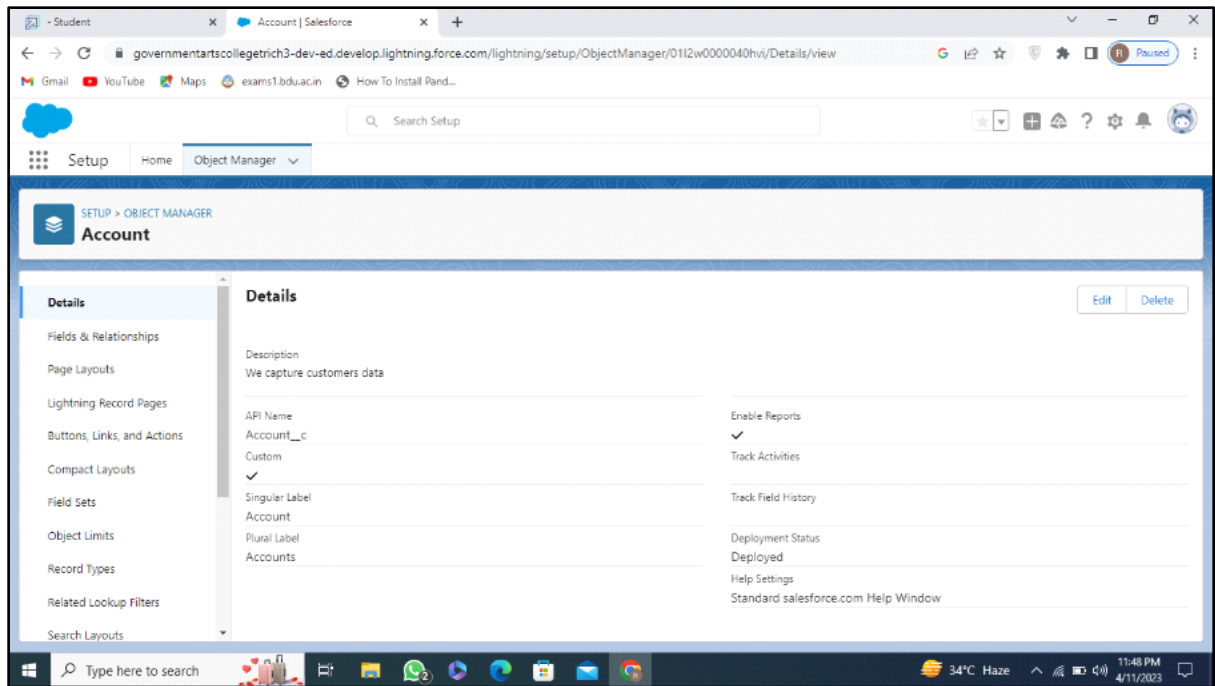
LEADS:-



descr:

>>> We capture leads here.

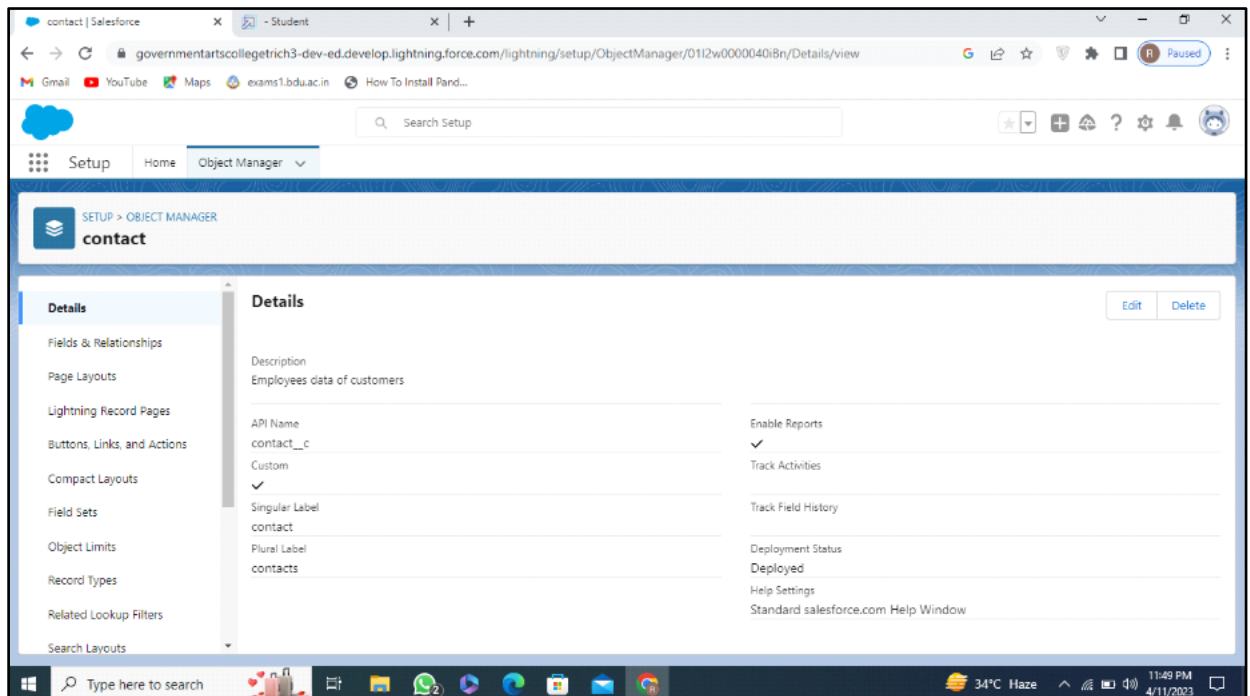
ACCOUNTS:-



descr:

>>> We capture customers data.

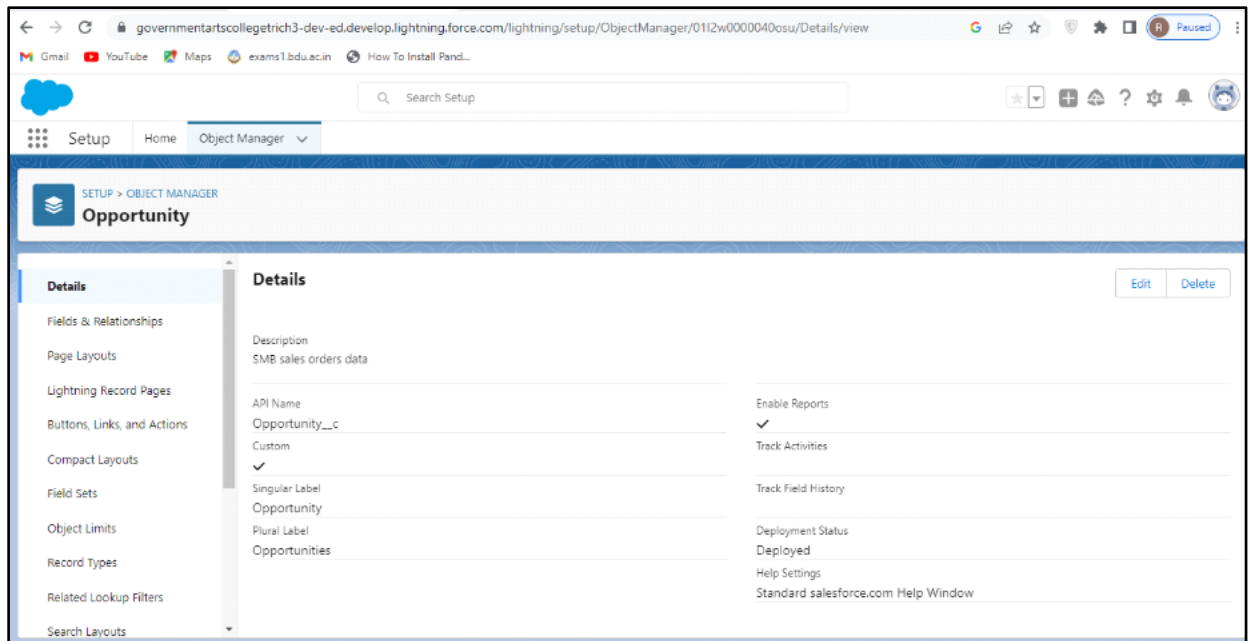
CONTACTS:-



descr:

>>> Employes data of customers.

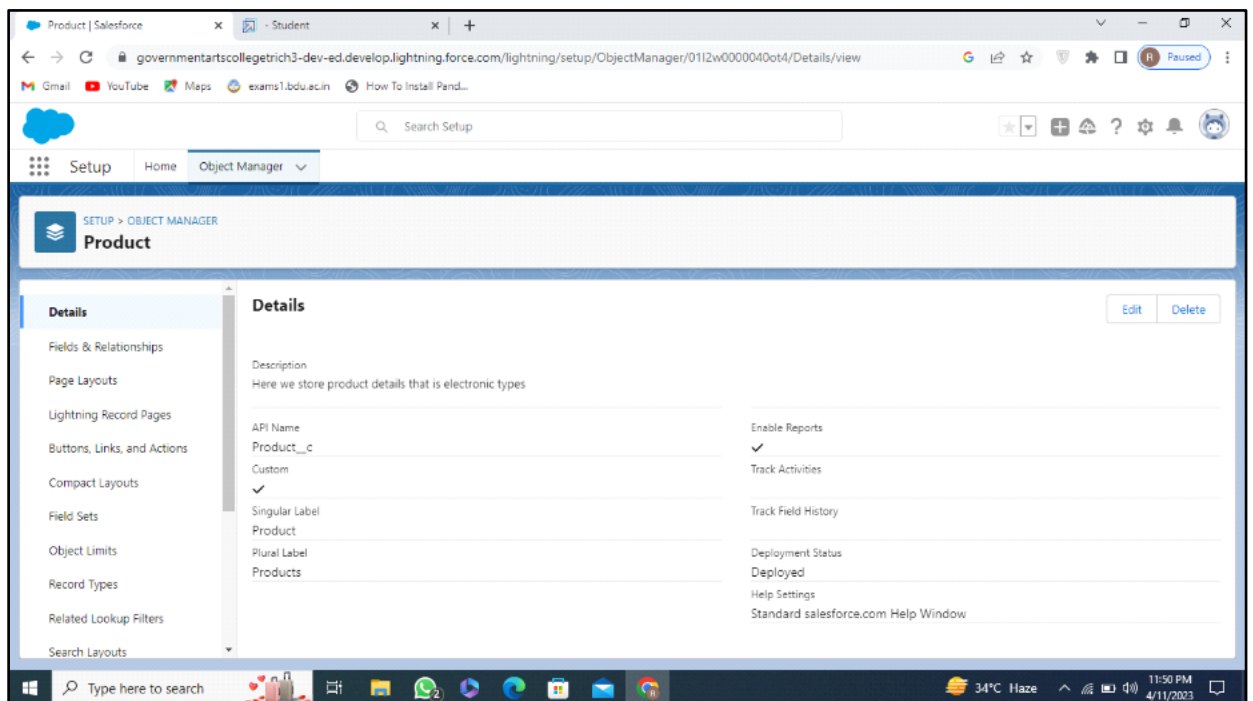
OPPORTUNITIES:-



descr:

>>> SMB sales order of customers.

PRODUCTS:-

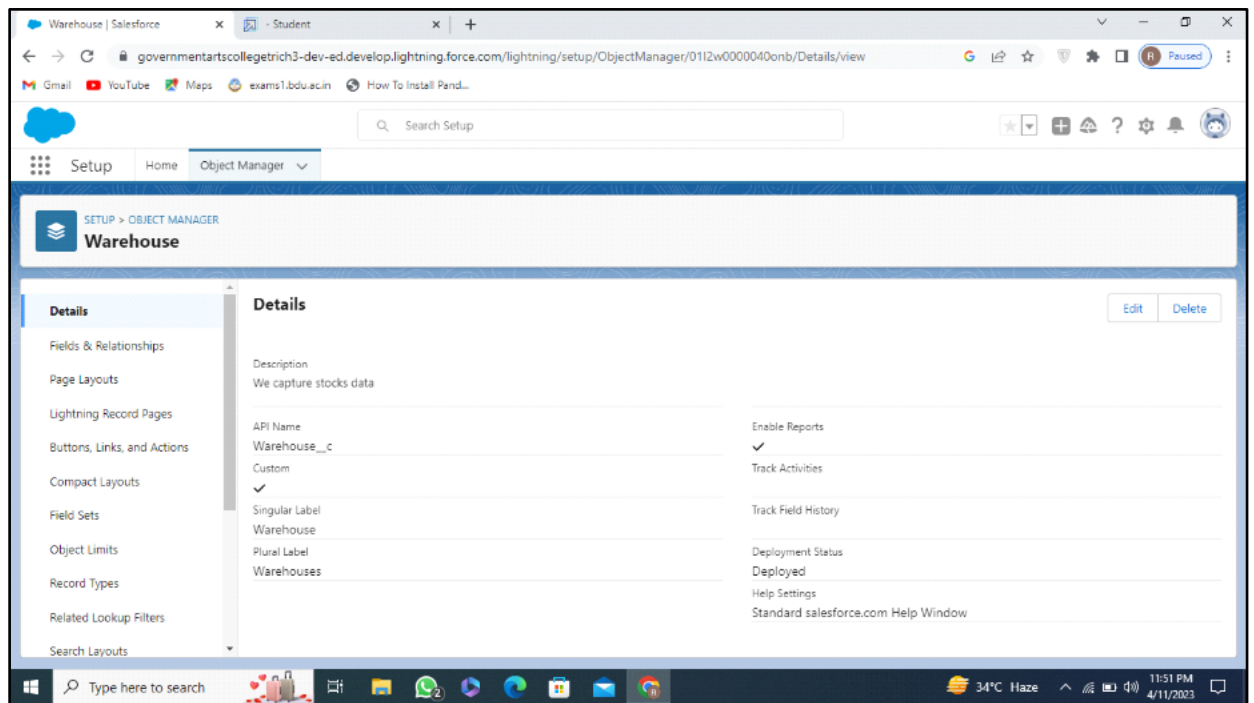


descr:

>>> Here we store product details.

i.e) Electronic types

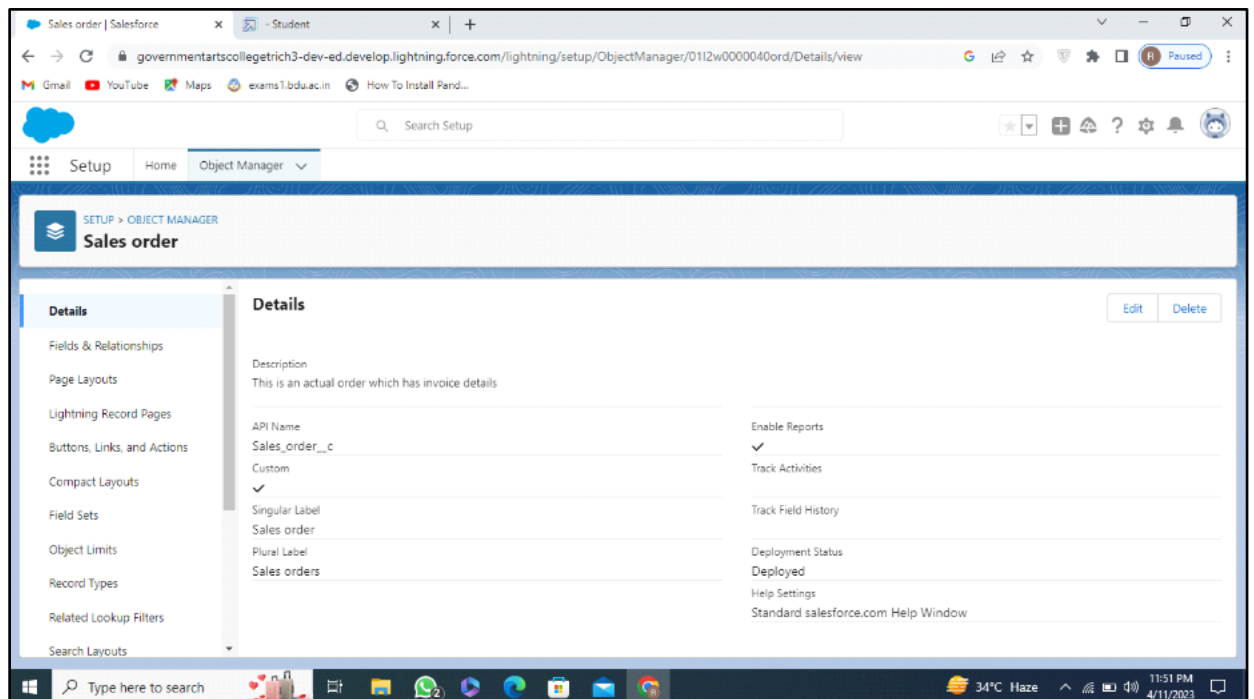
WAREHOUSE:-



descr:

>>> We capture stocks data.

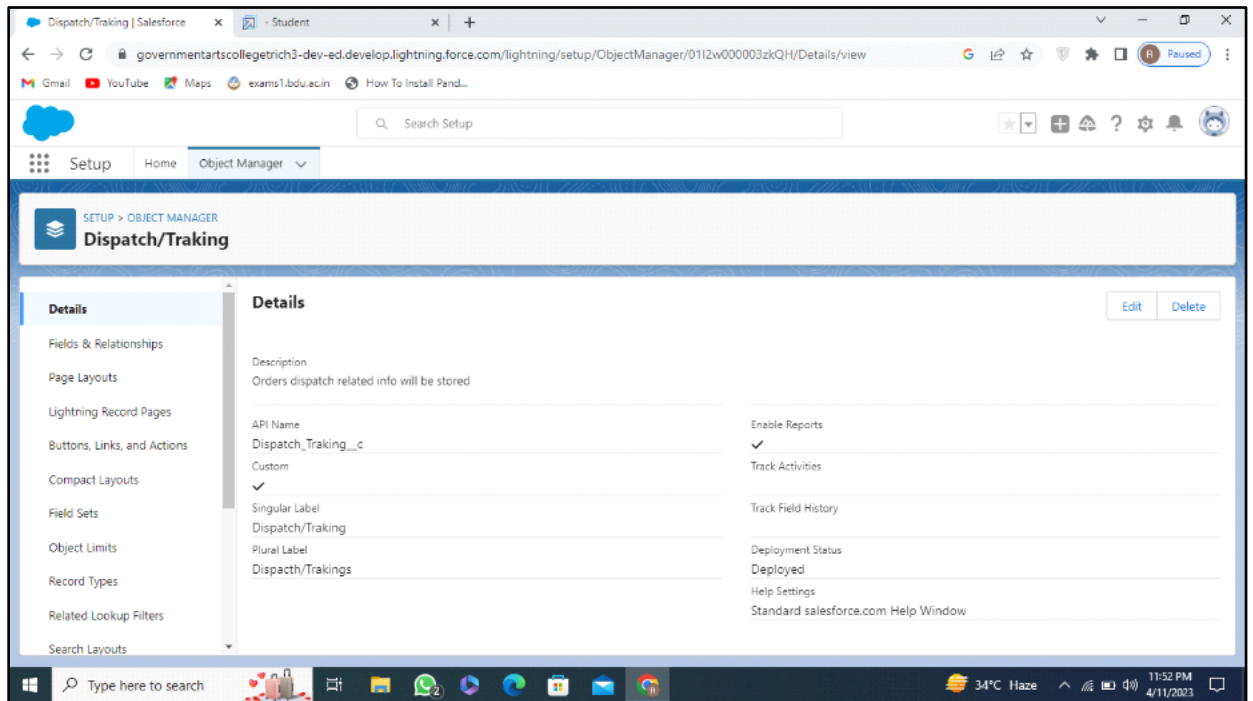
SALES ORDER:-



descr:

>>> This is an actual order which has invoice details.

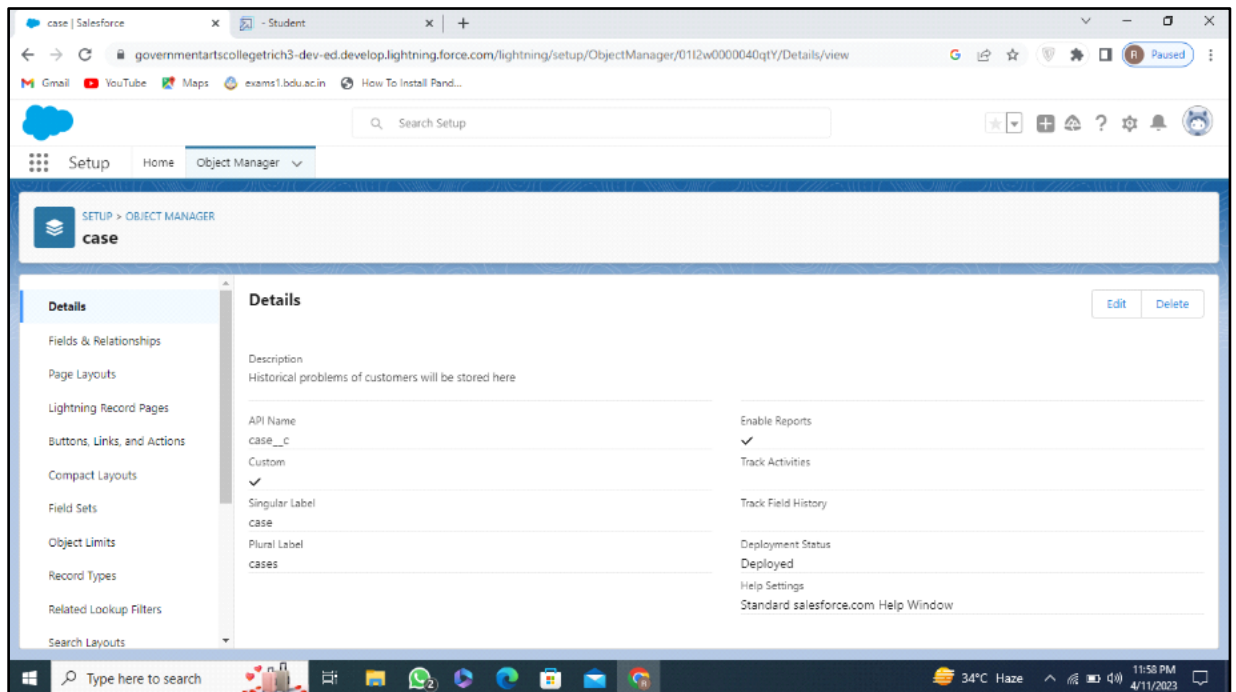
DISPATCH/TRAKING:-



descr:-

>>> Orders dispatch related info will be stored here.

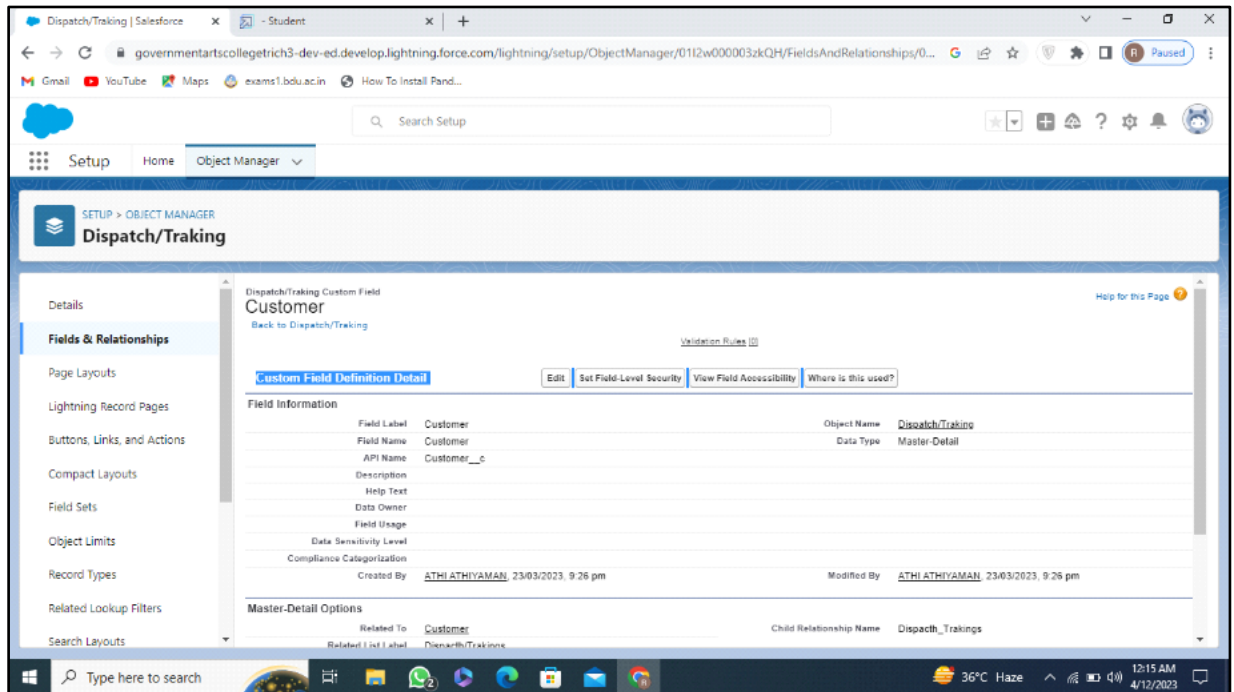
CASES:-



descr:

>>> Historical problems of customers will be stored here.

Milestone-3 Relationship b/w objects:-



descr:

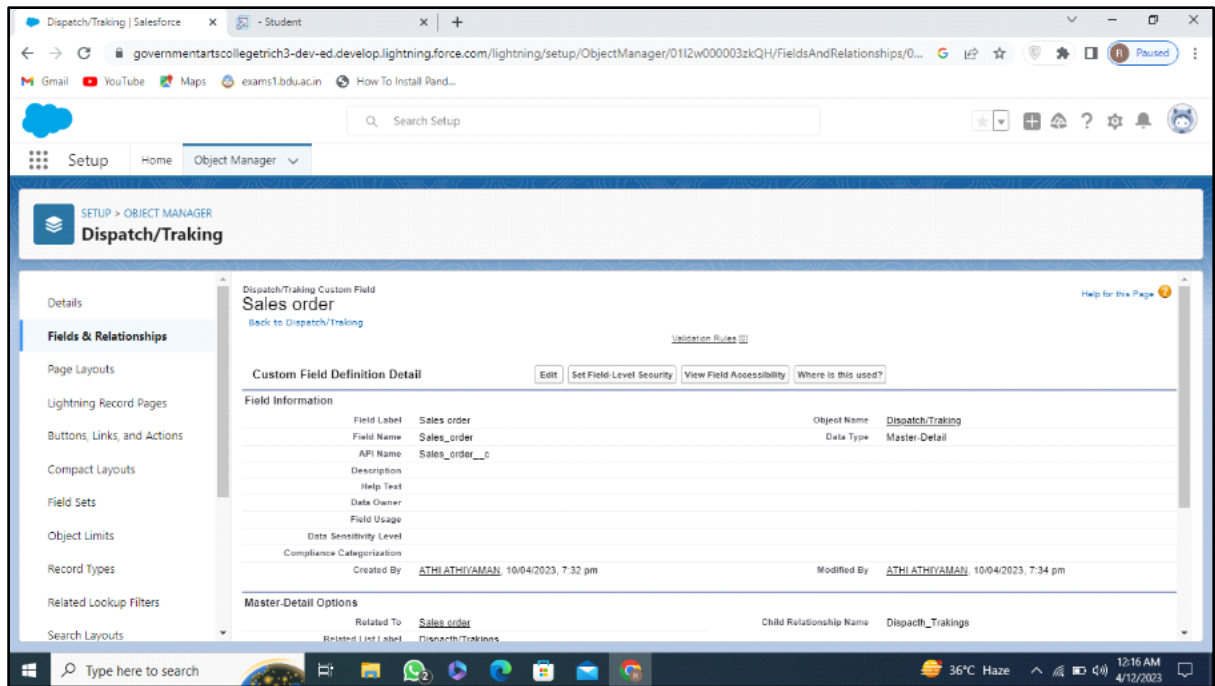
>>> Select your object from object selection has Dispatch/Tracking.

>>> And select the option fields and relationships. At the top right side you can find a new select that option.

>>> Now you have to select data type. Checkbox Has data type.And you will navigate to enter the details page where you give the field label.

>>> And give the label name has Dispatched. 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.

>>> Click next you will navigate to field level security click on visible checkbox so that it is visible to all profiles. Select the next option. select the page layout and save it.



descr:

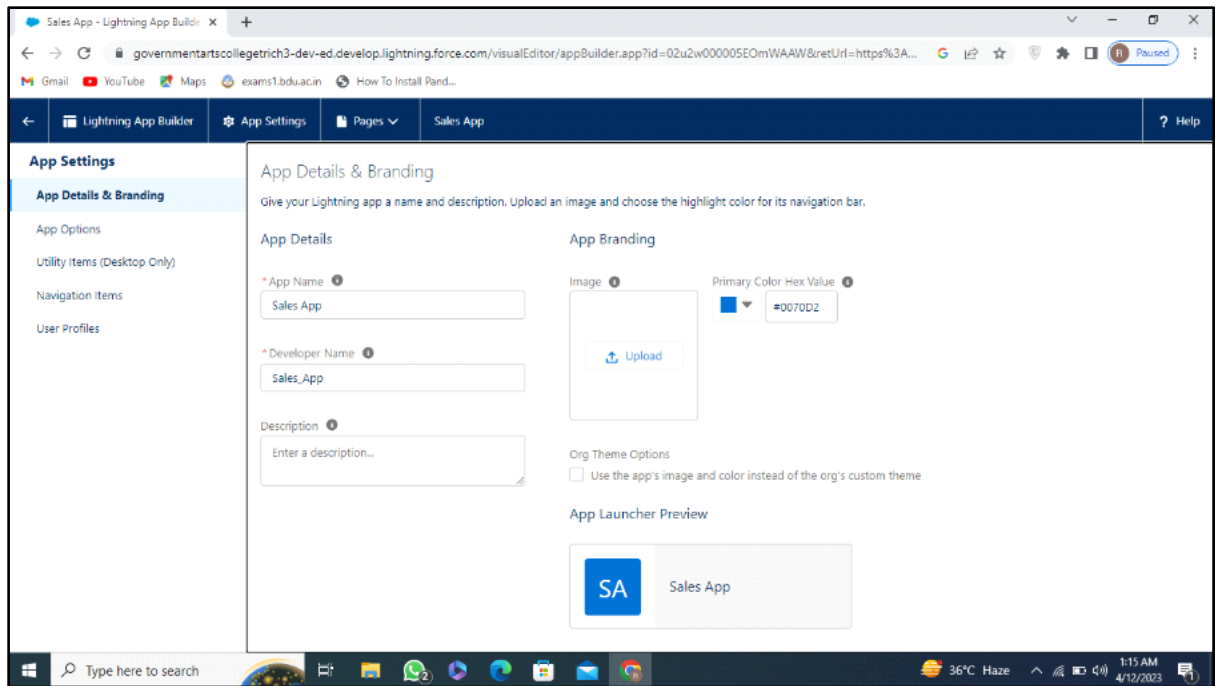
>>> Go to the Set Up option from the Home Page and click on it.

>>> Go to the object manager and select 'Dispatch/tracking' object from the list And select fields and relationships and click on new. Select the data type has Master detail relationship.

>>> And select related to the object has sales order. and click on next. 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.

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

Milestone-4 Application:-



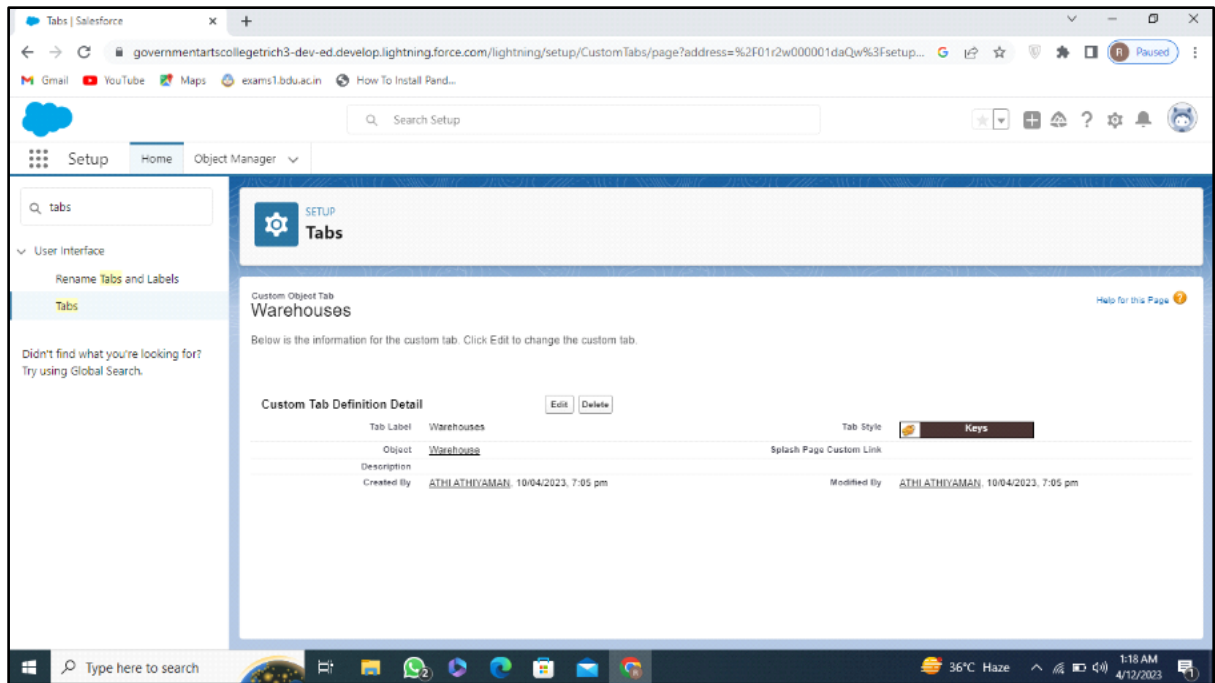
descr:

>>> Navigate to setup and search for app manager. And select an option for a new lightning app. Give the app name has sales app.

>>> Upload the picture and click next. Choose the app option as navigation style- standard navigation. support from factors-desktop & mobile and select next.

>>> And move the objects from available items to selected items. Accounts.contacts.opportunities.Leads.warehouse. dispatch/tracking.campaign to selected items. And system admin profile to available items to selected items.

Milestone-5 Layouts:-



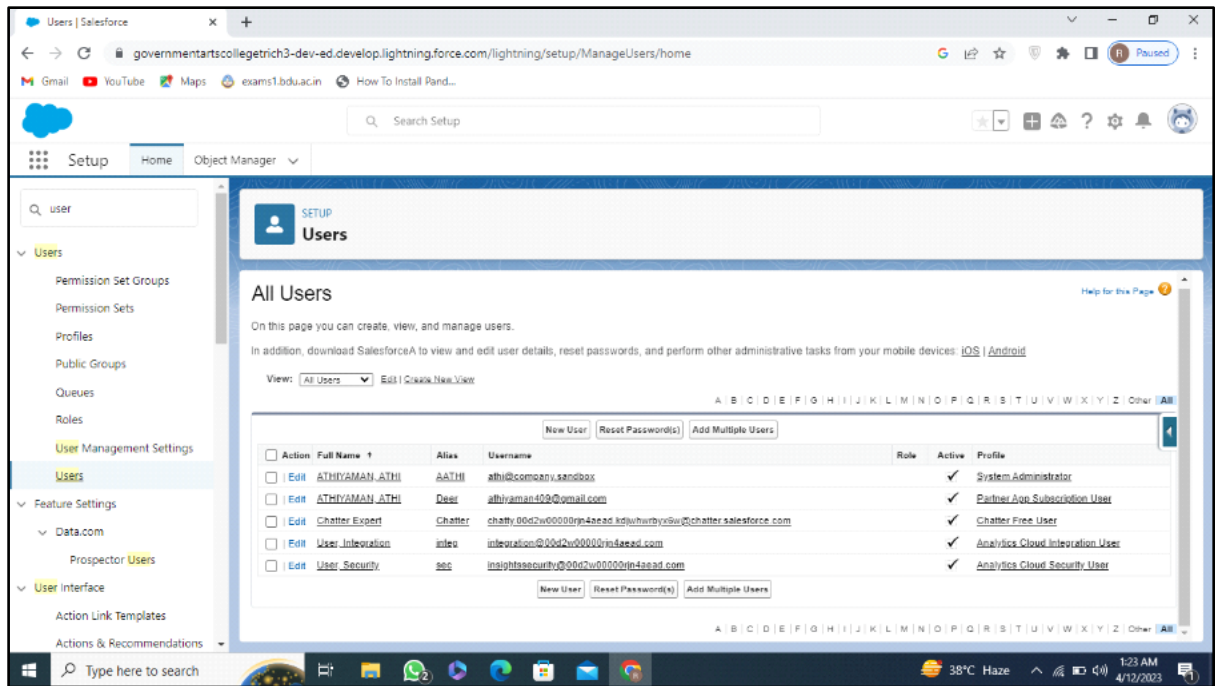
descr:

>>> Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs. Under Custom Object Tabs, click New.

>>> For Object, select Warehouse. For Tab Style, select any icon.

>>> Leave all defaults as is. Click Next. Next, and Save. In the same way create other objects such as students and parents.

Milestone-6 User:-



descr:

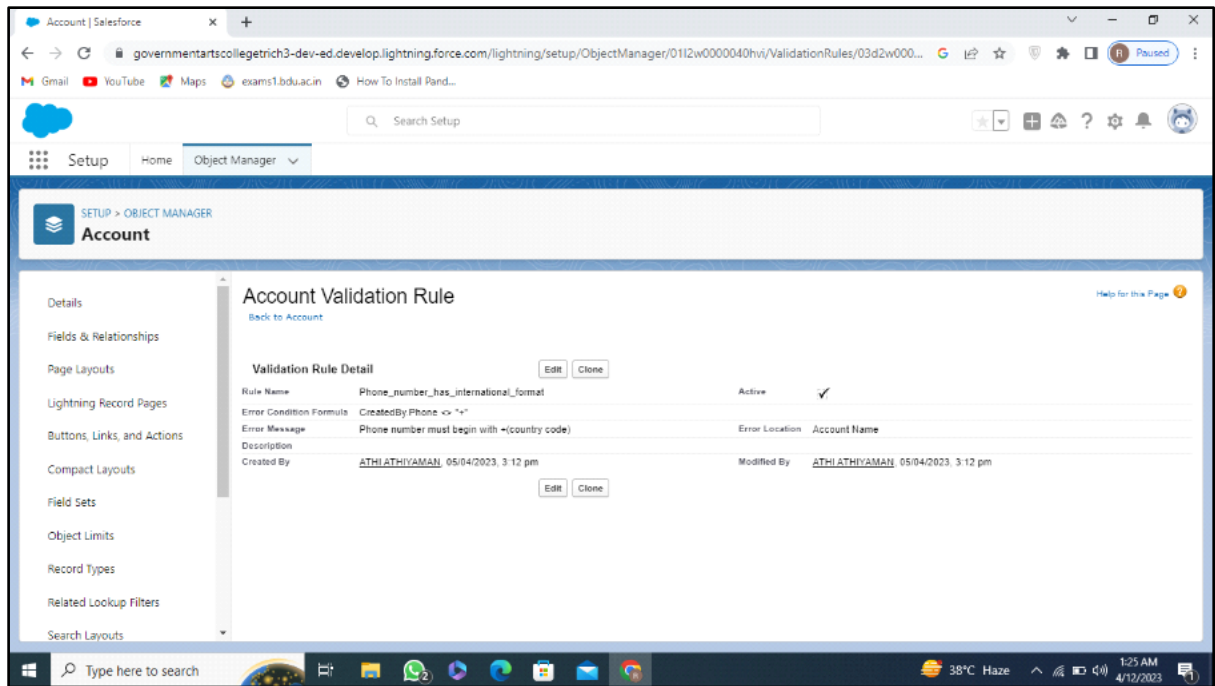
>>> Navigate to setup in quick find search bar.Type user in and select it and click on new user.

>>> Give the first name and last name.Enter your email in the email field.Enter username: it must be unique.

>>> Select the user license of salesforce.In the profile field select standard platform profile.

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

Milestone-7 Validation Rules:-



descr:

>>> Navigate to object manager and select Account object. In details section scroll down and find validation rule in it.

>>> Click new, give the label name and in edit error conditional formula give the formula `hasLEFT(Phone, 1) <> "+"`.

>>> And in error message give the description has Phone number must begin with + (country code). In error location select top of the field.

Milestone-7 Reports :-

Report: Accounts
New Accounts Report

Total Records
4

Account Name	Account Owner	ATHI ATHIVAMAN	Total
<input type="checkbox"/> ATHIYAMAN	Record Count	1	1
<input type="checkbox"/> GURU	Record Count	1	1
<input type="checkbox"/> SANGAR	Record Count	1	1
<input type="checkbox"/> VIMAL	Record Count	1	1

Details (4 Rows) Click an intersection in the table above to filter details.

Created By
1 ATHI ATHIVAMAN
2 ATHI ATHIVAMAN
3 ATHI ATHIVAMAN
4 ATHI ATHIVAMAN

Row Counts ☒ Detail Rows ☒ Grand Total ☒ Stacked Summaries ☒

descr:

>>> Click on the app launcher and search for reports. And select a new report. for the record type category select other reports.

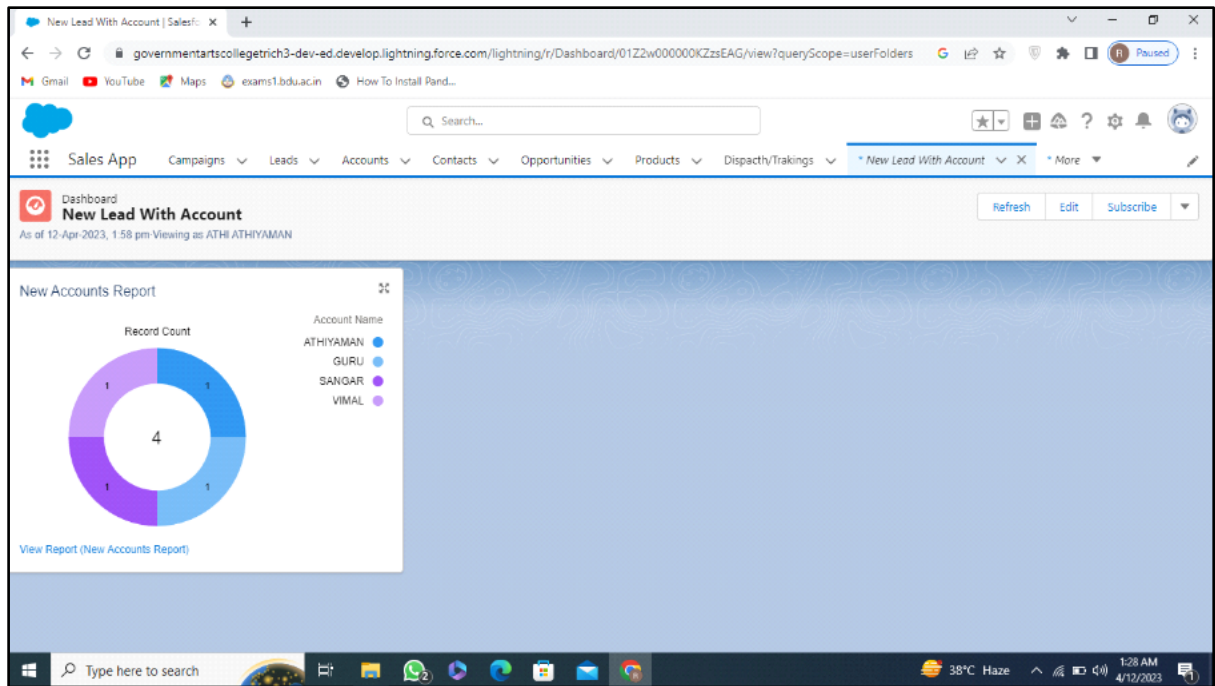
>>> Select Warehouses for the report type name. Select the start button to create a new report.

>>> At the left side of the report you can find an outline pane. In the group rows select Product name.

>>> And in columns warehouse: warehouse name and stock available. Now navigate to the filter pane available next to the outline pane and ensure in the show me section all my warehouses is selected.

>>> And in the warehouse created date select all time. And give the label name products with stock availability. Click on save and run for saving the report.

Milestone-8 Dashboards:-



descr:

>>> Click on the app launcher and search for dashboards. Select the new dashboard option. Name the dashboard has a products with stock availability. And select create option.

>>> Now click on Add component and for report select passport with locations. Select the donut chart in display as section.

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

>>> Leave the default values.

>>> Click on add.

>>> And save the dashboard.

TRAILHEAD PROFILE PUBLIC URL:-

Team lead – <https://trailblazer.me/id/athiyaman>

Team Member 1 – <https://trailblazer.me/id/rsarasurani>

Team Member 2 - <https://trailblazer.me/id/kannaki2003>

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

ADVANTAGES AND DISADVANTAGES:-

ADVANTAGES:

- >>> Requires Less Capital*
- >>> More profit margin than wholesalers*
- >>> Better customer relation*
- >>> Credit facility*
- >>> No liability towards the buyers*

DISADVANTAGES:

- >>> Requires more marketing costs*
- >>> Goods selling skill is required*
- >>> High competition*
- >>> No benefit of bulk buying*

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.

CONCLUSION:-

>>> Retail management refers to the process of helping customers find products in your store. It includes everything from increasing your customers pool to how products are presented. and how you fulfilled a customer's needs.

>>> A good store manager helps customers leave the store with a smile.

FUTURE SCOPE:-

Salesforces 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 includes tools for managing inventory, sales, customer data, marketting, and more.