

# **PROJECT REPORT TEMPLATE**

## **RETAIL MANAGEMENT APPLICATION USING SALESFORCE**

### **1.INTRODUCTION**

#### **1.1 Overview**

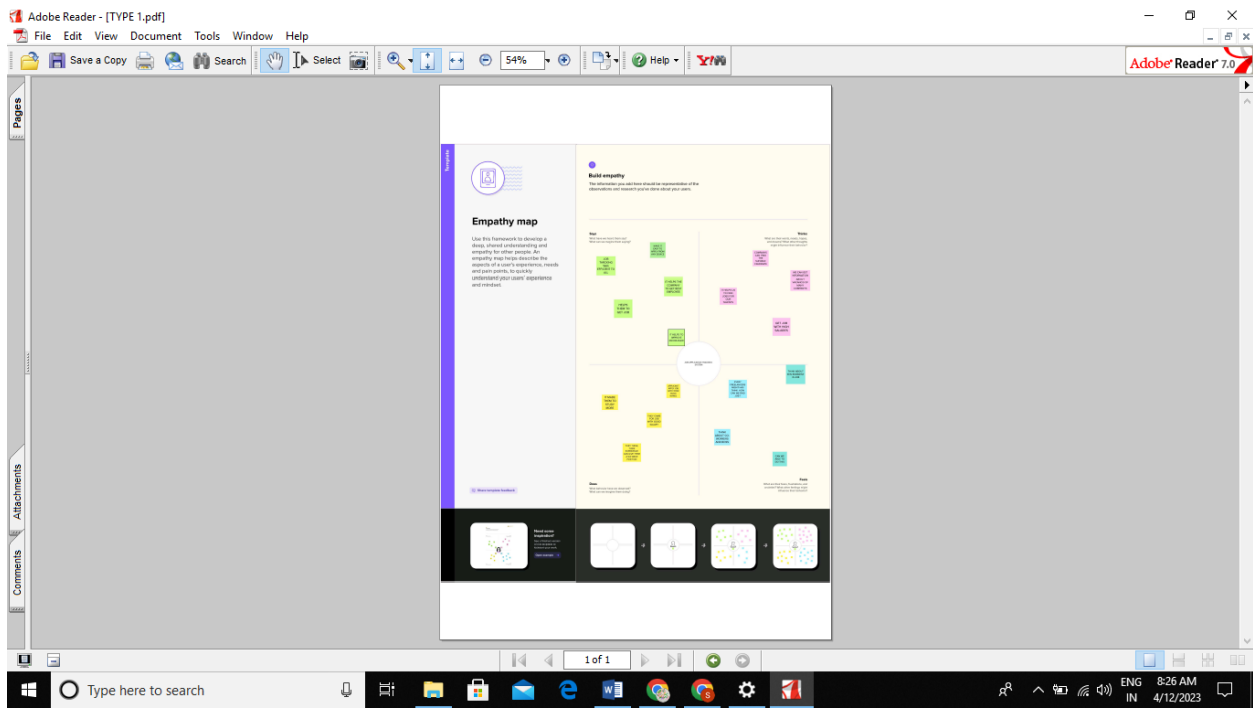
Retail Management deals with selling of goods and services to consumers. It involves a direct interaction with the customer and coordinating business activities from designing of a product to its delivery and post-delivery service. Those who are specialists in retail management are generally known as Retail Managers.

#### **1.2 Purpose**

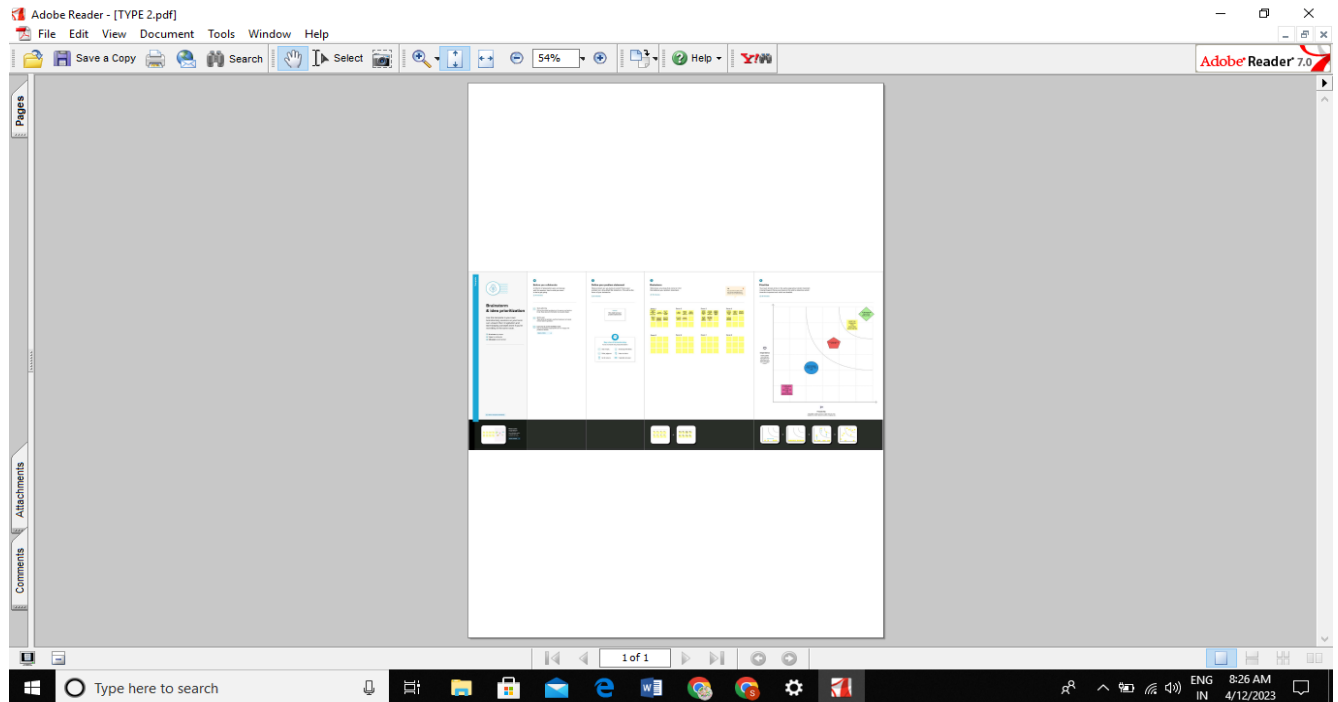
- ❖ **Manage employees**
- ❖ **Handle customer complaints**
- ❖ **Monitor store performance**
- ❖ **Mitigate shrinkage**

### **2.Problem definition &Design thinking**

#### **2.1 Empathy Map**



## 2.2 IDEATION & BRAINSTORMING MAP



## 3. RESULT

### 3.1 DATA MODEL:

OBJECT NAME	FIELD IN THE OBJECT	TYPE
Object 1	FIELD LABEL	DATA TYPE
	Customer name	text
	Customer mobile no	number
	Campaign	text
	Lends	text

	<b>Accounts</b>	<b>text</b>
	<b>contacts</b>	<b>number</b>
	<b>opportunities</b>	<b>text</b>
	<b>products</b>	<b>text</b>
	<b>warehouse</b>	<b>text</b>
	<b>Sales order</b>	<b>text</b>
	<b>Dispatch/tracking</b>	<b>text</b>
	<b>Cases</b>	<b>text</b>
	<b>accounts</b>	<b>text</b>

<b>OBJECT 2</b>	<b>S.NO</b>	<b>FIELD NAME</b>	<b>DATA TYPE</b>
	<b>1</b>	<b>Customer name</b>	<b>text</b>
	<b>2</b>	<b>License no</b>	<b>text</b>
	<b>3</b>	<b>Mobile no</b>	<b>Number</b>
	<b>4</b>	<b>Fair per hour</b>	<b>text</b>
	<b>5</b>	<b>Retail</b>	<b>Lookup(retail)</b>

## 3.2 ACTIVITY & SCREENSHOT

The screenshot shows the Salesforce Custom Tabs configuration page. The browser address bar displays the URL: `thiruvalluvargovernmentar-c-dev-ed.develop.my.salesforce.com/setup/ui/customtabs.jsp?setupid=CustomTabs&appLayout=setup&noS1Redirect=true`. The Salesforce header includes the logo, a search bar, and navigation links like "Switch to Lightning Experience", "PANTHAKUMAR K", "Setup", "Help", and "Content". The left sidebar contains navigation options: Home, Chatter, Libraries, Content, Subscriptions, Dispatch/tracking, warehouse, students, and parents. Below these are sections for "Lightning Experience Transition Assistant", "Salesforce Mobile Quick Start", "Home", and "Administer" (with sub-links for Release Updates, Manage Users, Manage Apps, Manage Territories, Company Profile, and Data Classification).

### Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

#### Custom Object Tabs

Action	Label	Tab Style	Description
Edit   Del	<a href="#">Dispatch/tracking</a>	Heart	
Edit   Del	<a href="#">parents</a>	Safe	
Edit   Del	<a href="#">students</a>	Books	
Edit   Del	<a href="#">warehouse</a>	Building	

#### Web Tabs

No Web Tabs have been defined

#### Visualforce Tabs

No Visualforce Tabs have been defined

The bottom of the image shows the Windows taskbar with the search bar, task icons, and system tray showing the date and time as 9:21 AM on 4/12/2023.

Home | Salesforce

Dispatch/tracking | Salesforce

+

thiruvalluvargovernmentar-c-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003RtNb/Details/view?0.source=alohaHeader

- Student Gmail YouTube Maps Get Started with th...

Search Setup

Setup Home Object Manager

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

Search Layouts

Details

Description

API Name

Dispatch\_tracking\_\_c

Custom

✓

Singular Label

Dispatch/tracking

Plural Label

Dispatch/tracking

Enable Reports

✓

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

EditDelete

https://thiruvalluvargovernmentar-c-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003RtNb/Details/view?0.source=alohaHeader

Type here to search

ENG IN 9:00 AM 4/12/2023

Dispatch/tracking | Salesforce

thiruvalluvargovernmentar-c-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003RtNb/FieldsAndRelationships/view

- Student Gmail YouTube Maps Get Started with th...

Search Setup

Setup

Home

Object Manager

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

Fields & Relationships

5 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

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(Order)		✓

https://thiruvalluvargovernmentar-c-dev-ed.develop.lightning.force.com/one/one.app#/setup/ObjectManager/0112w000003RtNb/FieldsAndRelationships/view

Type here to search

ENG

8:06 PM

4/12/2023



App Manager | Salesforce

thiruvalluvargovernmentar-c-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

- Student Gmail YouTube Maps Get Started with th...

Search Setup

Setup Home Object Manager

app manager

Apps

App Manager

Didn't find what you're looking for?  
Try using Global Search.

Enable App Cloning Disabled

22 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

	App Name	Developer Name	Description	Last Modified	Ap...	Vi...	
10	Marketing	Marketing	Best-in-class on-demand marketing automation	10/03/2023, 1:01 pm	Classic	✓	
11	Platform	Platform	The fundamental Lightning Platform	10/03/2023, 1:01 pm	Classic		
12	Queue Management	QueueManagement	Create and manage queues for your business.	10/03/2023, 1:01 pm	Lightning	✓	
13	Sales	Sales	The world's most popular sales force automation (SFA) solution	10/03/2023, 1:01 pm	Classic		
14	Sales	LightningSales	Manage your sales process with accounts, leads, opportunitie...	10/03/2023, 1:05 pm	Lightning	✓	
15	sales app	panthal_k		31/03/2023, 2:04 pm	Lightning	✓	
16	Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple reco...	10/03/2023, 1:01 pm	Lightning	✓	
17	Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and f...	10/03/2023, 1:01 pm	Classic	✓	
18	Salesforce Schedul...	LightningScheduler	Set up personalized appointment scheduling.	10/03/2023, 1:04 pm	Lightning	✓	
19	Service	Service	Manage customer service with accounts, contacts, cases, and ...	10/03/2023, 1:01 pm	Classic	✓	

Type here to search

ENG 9:23 AM 4/12/2023



Custom Tabs ~ Salesforce - Deve

thiruvalluvargovernmentar-c-dev-ed.develop.my.salesforce.com/setup/ui/customtabs.jsp?setupid=CustomTabs&appLayout=setup&noS1Redirect=true

StudentGmailYouTubeMapsGet Started with th...

salesforce

23

Search...Search

Switch to Lightning ExperiencePANTHALKUMAR KSetupHelpContent

HomeChatterLibrariesContentSubscriptionsDispatch/trackingwarehousestudentsparents

Quick Find / Search...Expand AllCollapse All

Lightning Experience Transition Assistant

Move to the new, more productive Salesforce.

Get Started

Salesforce Mobile Quick Start

Home

Administer

Release UpdatesManage UsersManage AppsManage TerritoriesCompany ProfileData Classification

Custom Tabs

Help for this Page

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

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Custom Object Tabs

NewWhat Is This?

Action	Label	Tab Style	Description
Edit   Del	Dispatch/tracking	Heart	
Edit   Del	parents	Safe	
Edit   Del	students	Books	
Edit   Del	warehouse	Building	

Web Tabs

NewWhat Is This?

No Web Tabs have been defined

Visualforce Tabs

NewWhat Is This?

No Visualforce Tabs have been defined

Type here to search

Taskbar icons: File Explorer, Mail, Edge, Word, Chrome

System tray: Network, Volume, ENG IN, 9:21 AM, 4/12/2023

Users | Salesforce

All Users ~ Salesforce - Develop

thiruvalluvargovernmentar-c-dev-ed.develop.my.salesforce.com/005?isUserEntityOverride=1&appLayout=setup&noS1Redirect=true

Student Gmail YouTube Maps Get Started with th...

salesforce

'23

Search...

Search

Switch to Lightning Experience PANTHALKUMAR K Setup Help Content

Home Chatter Libraries Content Subscriptions Dispatch/tracking warehouse students parents +

Quick Find / Search...

Expand All Collapse All

Lightning Experience Transition Assistant

Move to the new, more productive Salesforce.

Get Started

Salesforce Mobile Quick Start

Home

Administer

Release Updates

Manage Users

Users

Mass Email Users

Roles

All Users

Help for this Page

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

View: All Users Edit Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

New User Reset Password(s) Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty_00d2w00000rjwpead.qvls3oqgfrwt@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	K. PANTHALKUMAR	PK	panthalkumar@tpac.com		✓	System Administrator
<input type="checkbox"/> Edit	K. panthalkumar	pk	panthalkumar55@gmail.com		✓	System Administrator
<input type="checkbox"/> Edit	User Integration	integ	integration@00d2w00000rjwpead.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightssecurity@00d2w00000rjwpead.com		✓	Analytics Cloud Security User

New User Reset Password(s) Add Multiple Users

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Type here to search

ENG IN

9:26 AM

4/12/2023

Account | Salesforce

Account Validation Rule ~ Salesf

thiruvalluvargovernmentar-c-dev-ed.develop.my.salesforce.com/03d2w000000W6AmAAK?appLayout=setup&noS1Redirect=true

- Student Gmail YouTube Maps Get Started with th...

salesforce

'23

Search...

Search

Switch to Lightning Experience

PANTHALKUMAR K

Setup

Help

Content

Home Chatter Libraries Content Subscriptions Dispatch/tracking warehouse students parents

Quick Find / Search...  
Expand All | Collapse All

Lightning Experience Transition Assistant

Move to the new, more productive Salesforce.

Get Started

Salesforce Mobile Quick Start

Home

Administer

- Release Updates
- Manage Users
- Manage Apps
- Manage Territories
- Company Profile
- Data Classification

Account Validation Rule

Back to Account Validation Rules

Help for this Page

Validation Rule Detail

Edit Clone

Rule Name	Phone_number_has_international_format	Active	✓
Error Condition Formula	LEFT(Phone, 1) <> "+"		
Error Message	6383460234+(91)	Error Location	Phone
Description			
Created By	PANTHALKUMAR K, 01/04/2023, 1:45 pm	Modified By	PANTHALKUMAR K, 01/04/2023, 1:45 pm

Edit Clone

Type here to search

ENG 9:14 AM

IN 4/12/2023



Reports | Salesforce

thiruvalluvargovernmentar-c-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru

Student Gmail YouTube Maps Get Started with th...

Search...

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

Recent

1 item

Search recent reports... New Report New Folder

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Accounts Report		Private Reports	PANTHAKUMAR K	1/4/2023, 2:22 pm	
Created by Me						
Private Reports						
Public Reports						
All Reports						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						

To Do List

Type here to search

9:46 PM 4/12/2023

Dashboards | Salesforce

thiruvalluvargovernmentar-c-dev-ed.develop.lightning.force.com/lightning/o/Dashboard/home?queryScope=mru

Student Gmail YouTube Maps Get Started with th...

Search...

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

Recent

1 item

Search recent dashboards... New Folder

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Product with stock availability		Private Dashboards	PANTHAKUMAR K	1/4/2023, 2:24 pm	
Created by Me						
Private Dashboards						
All Dashboards						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						

https://thiruvalluvargovernmentar-c-dev-ed.develop.lightning.force.com/lightning...

Type here to search

9:47 PM 4/12/2023

#### **4. TRAILHEAD PROFILE PUBLIC URL:**

- ❖ TEAM LEADER-<https://trailblazer.me/id/pantk2>
- ❖ TEAM LEADER 1- <https://trailblazer.me/id/moult3>
- ❖ TEAM LEADER 2- <https://trailblazer.me/id/elumg>
- ❖ TEAM LEADER 3- <https://trailblazer.me/id/gowtd5>
- ❖ TEAM LEADER 4- <https://trailblazer.me/id/dinek26>

#### **5. ADVANTAGES & DIS ADVANTAGES:**

- ❖ Store-Based Retailing
- ❖ Non-store bases retailing
- ❖ Service retailing
- ❖ Ownership and merchandise
- ❖ Banks and retail service and contracts
- ❖ Direct selling, online telemarketing orders, mechanized vending

#### **6. APPLICATION:**

A retail management system (RMS) is a platform that combines several modules to aid in the day-to-day operation of a retail store or chain, such as managing and buying inventory, checking out customers, scheduling employee shifts, keeping track of finances, etc.

#### **7. CONCLUSION:**

The course has also aimed to introduce the importance of marketing and communication from a retail perspective.

#### **8. FUTURE SCOPE:**

Retail management has become one of the fastest-growing occupations in the industry as the economy has grown significantly. The retail industry in India is the most appealing and fastest-growing in the world, demanding an increase in competent expertise in this discipline

