

## 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 customers data and the second application is service app for service reps/agents to provide support to customers in dealing cases.

I

### 1.2 Purpose

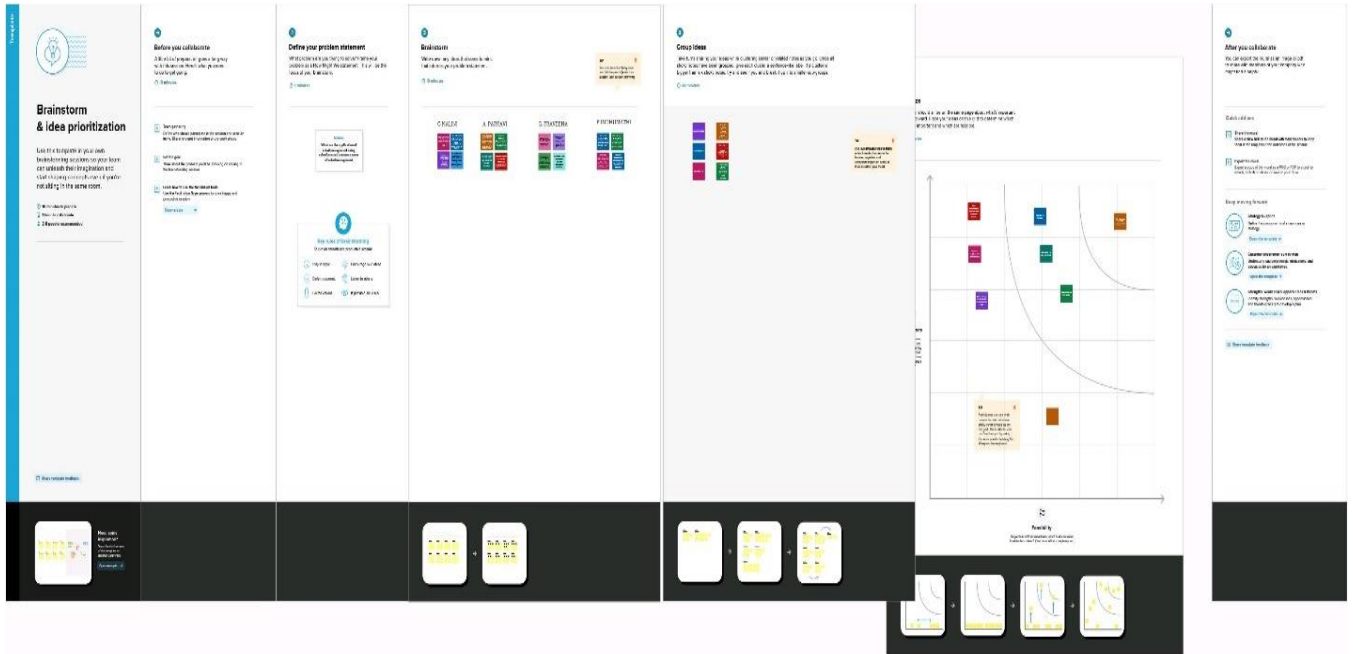
- \* Sales force can be used to manage orders from retail stores and distributors including tracking orders, processing , payments, and managing inventory levels.
- \* We provide a wide range of services that can be tailored around retail sales force management to help organization achieve their goals and focus on custom needs.

## 2 Problem Definition& Design Thinking

### 2.1 EMPATHY MAP



## 2.2 Ideation & Brainstorming Map



PastetheIdeation&brainstormingmapscreenshot

## 3 RESULT

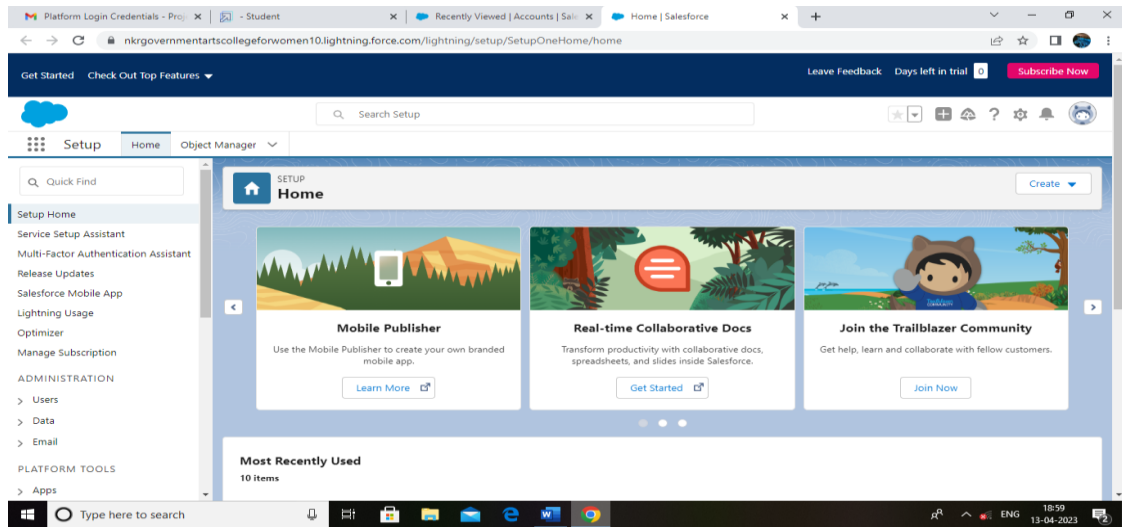
### 2.1 DataModel:

Object name	Fields in the Object	
Dispatch/tracking	Field label	Data type
	Tracking id	Text
	Dispatched	Text
Validation rules	Field label	Data type
	Account	Formula
	Contact	Formula

### 2.2 Activity & Screenshot

## Milestone-1:

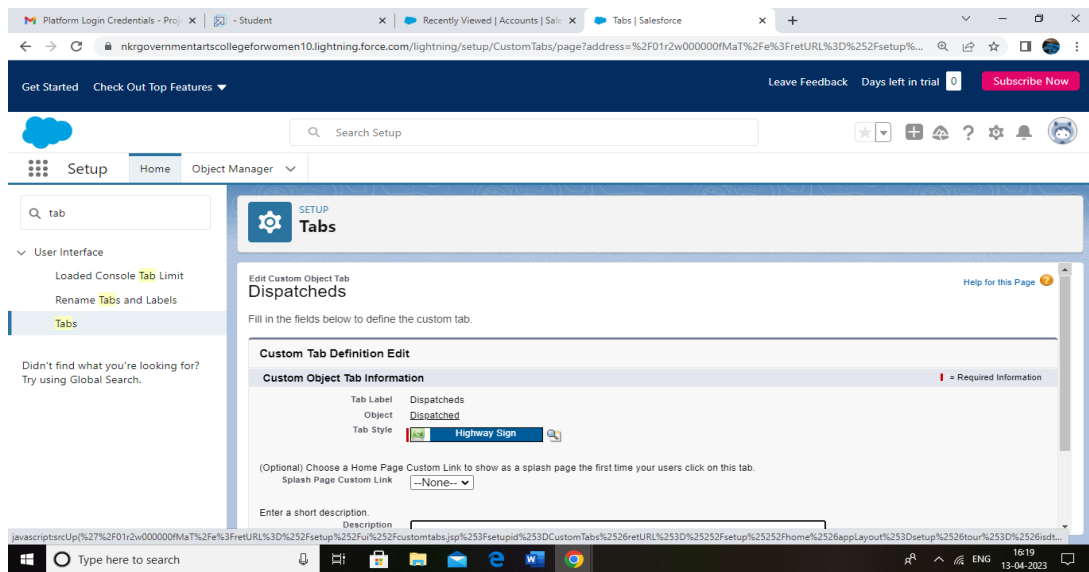
Login to Your Sales force Account



## Milestone-2

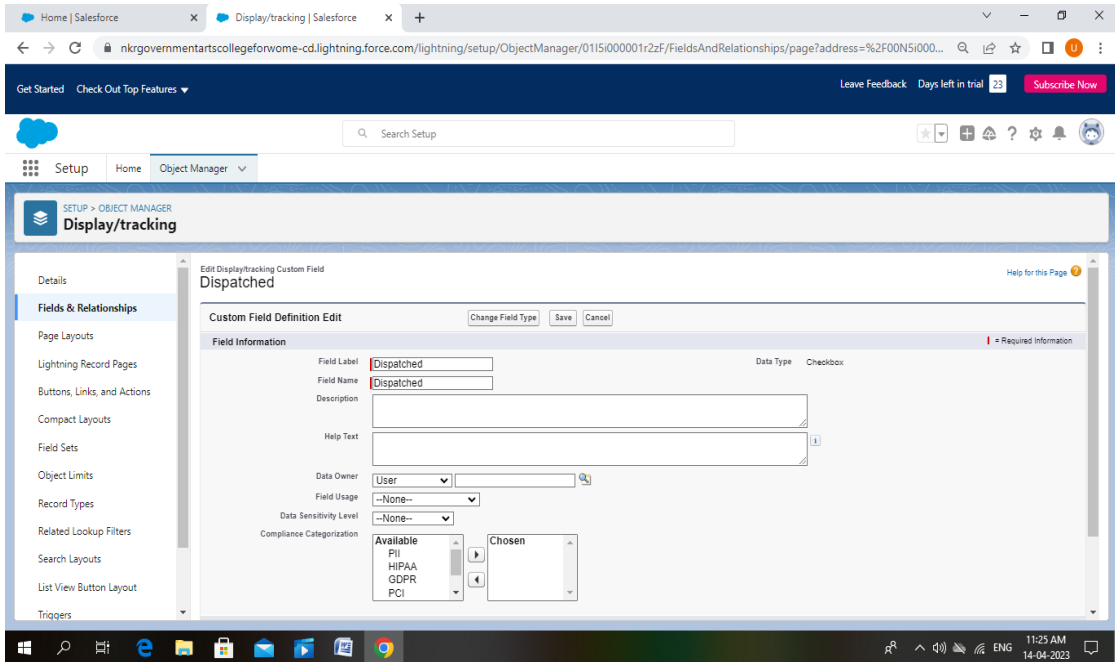
### Activity 1

#### Creation of object Dispatch/Tracking



### Activity-2

#### Fields available on Dispatch/tracking

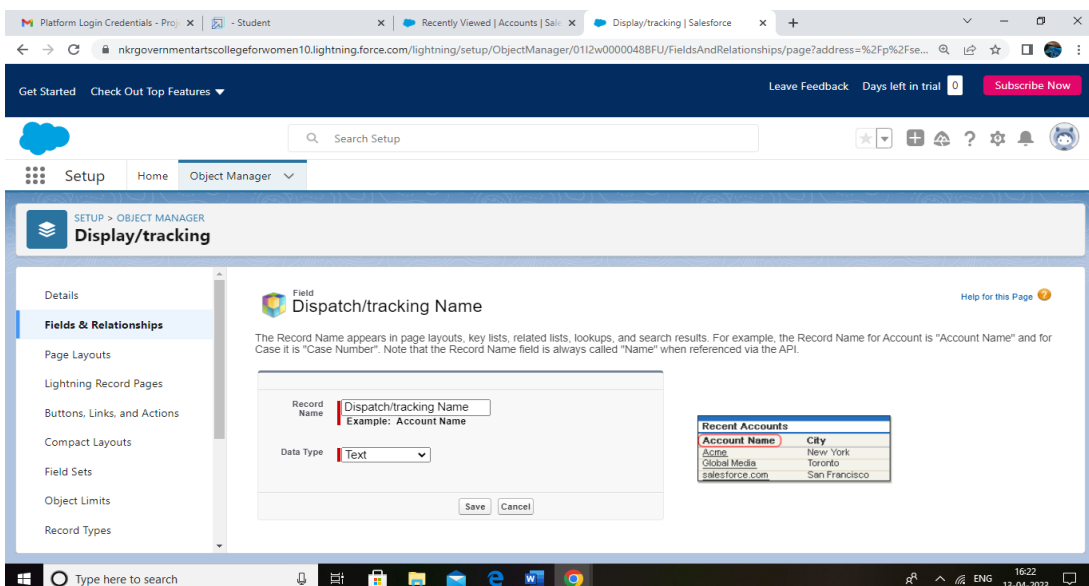


## Milestone-3

Relationship b/w objects:

### Activity-1:

Creation of relation between objects

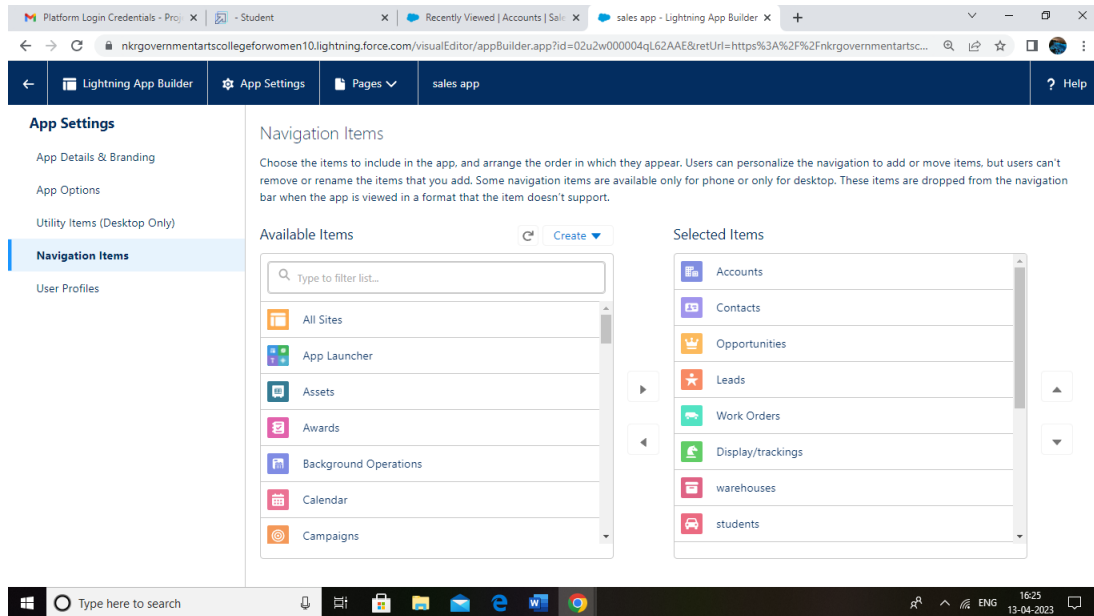


## Milestone-4

## Application:

### Activity-1

#### Creation of application

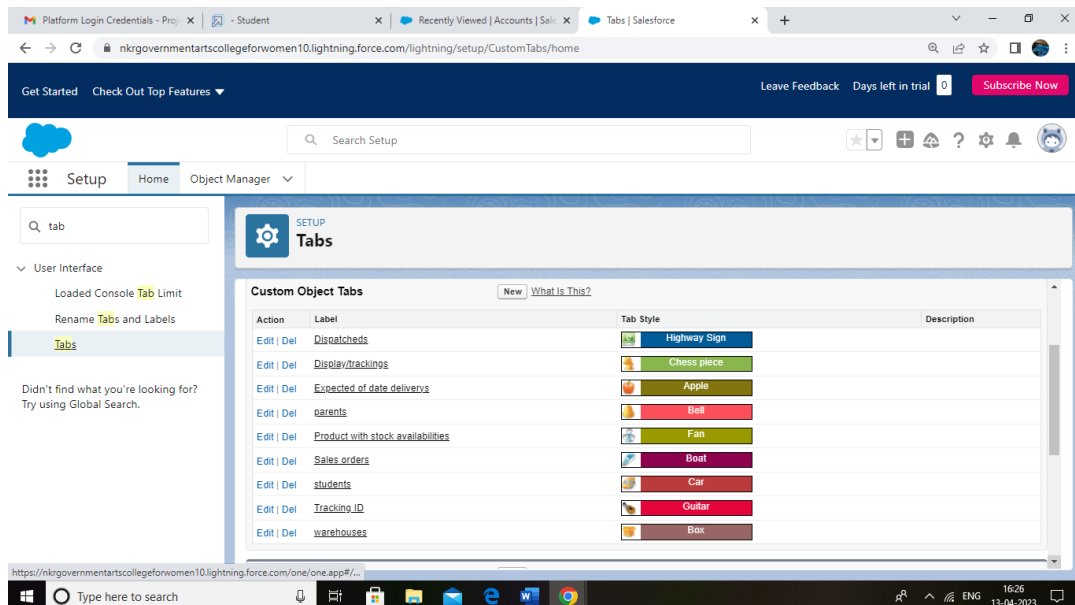


## Milestone-5

### Layouts:

#### Activity-1

#### Creation of custom tabs

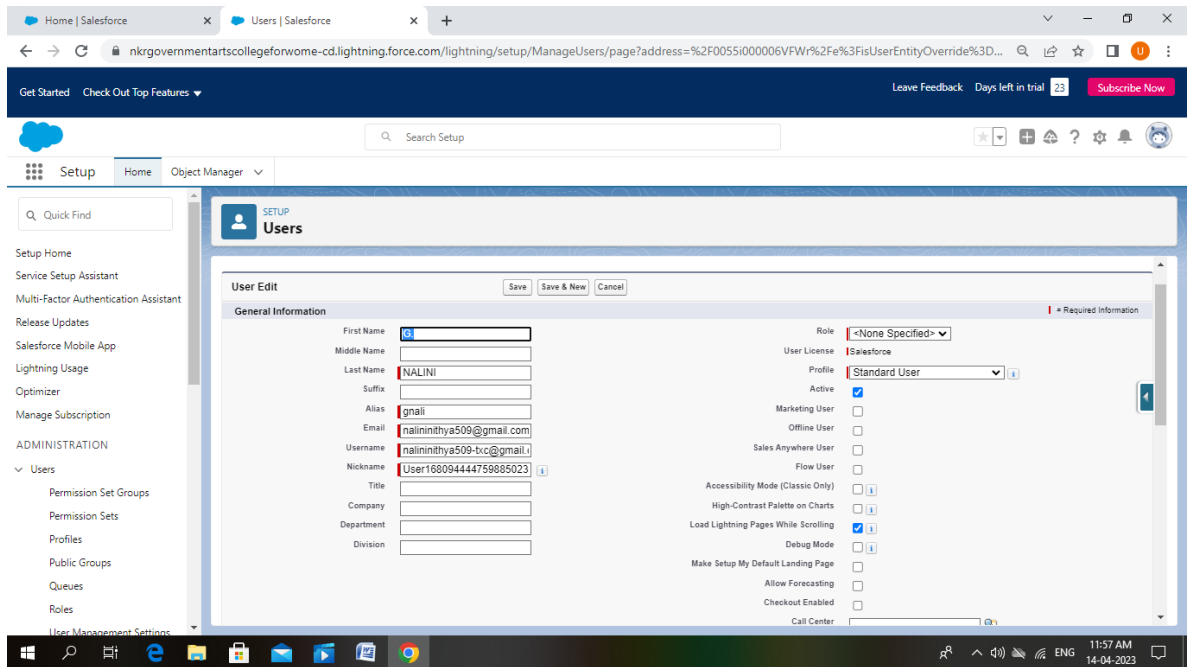


## Milestone-6

### User:

#### Activity-1

#### Creation of user



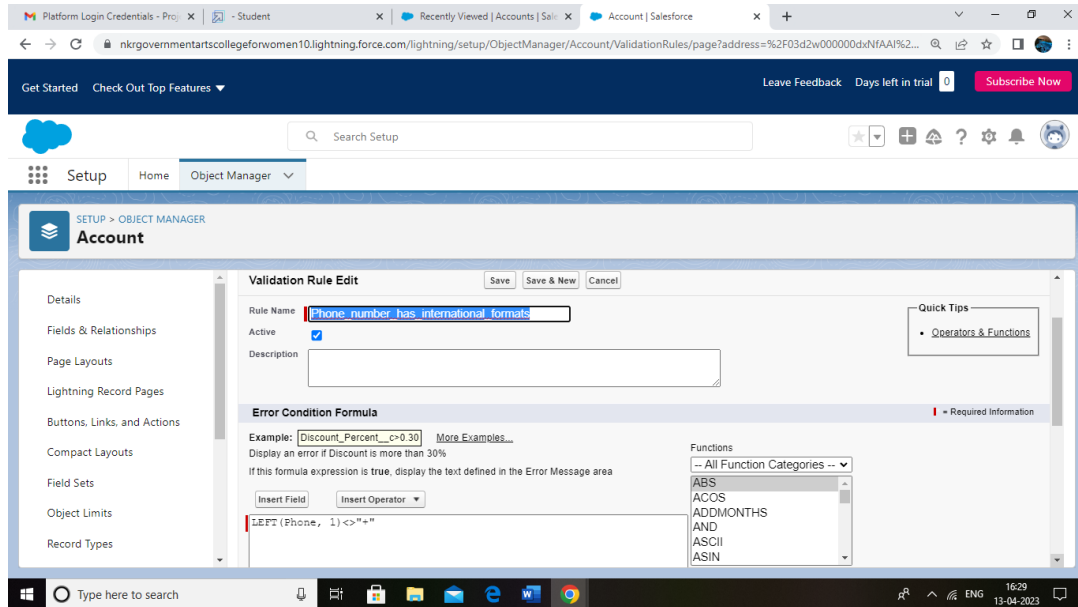
The screenshot shows the Salesforce 'User Edit' page. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area is titled 'Users' and contains a 'User Edit' form. The form is divided into two columns. The left column contains 'General Information' fields: First Name (A), Middle Name, Last Name (NALINI), Suffix, Alias (gnali), Email (nalininithya509@gmail.com), Username (nalininithya509-tcc@gmail.), Nickname (User16809444759885023), Title, Company, Department, and Division. The right column contains 'Role' (None Specified), User License (Salesforce), Profile (Standard User), Active (checked), Marketing User, Offline User, Sales Anywhere User, Flow User, Accessibility Mode (Classic Only), High-Contrast Palette on Charts, Load Lightning Pages While Scrolling (checked), Debug Mode, Make Setup My Default Landing Page, Allow Forecasting, Checkout Enabled, and Call Center. The bottom of the page shows a Windows taskbar with various application icons and a system clock indicating 11:57 AM on 14-04-2023.

## Milestone-7

### Validation Rules:

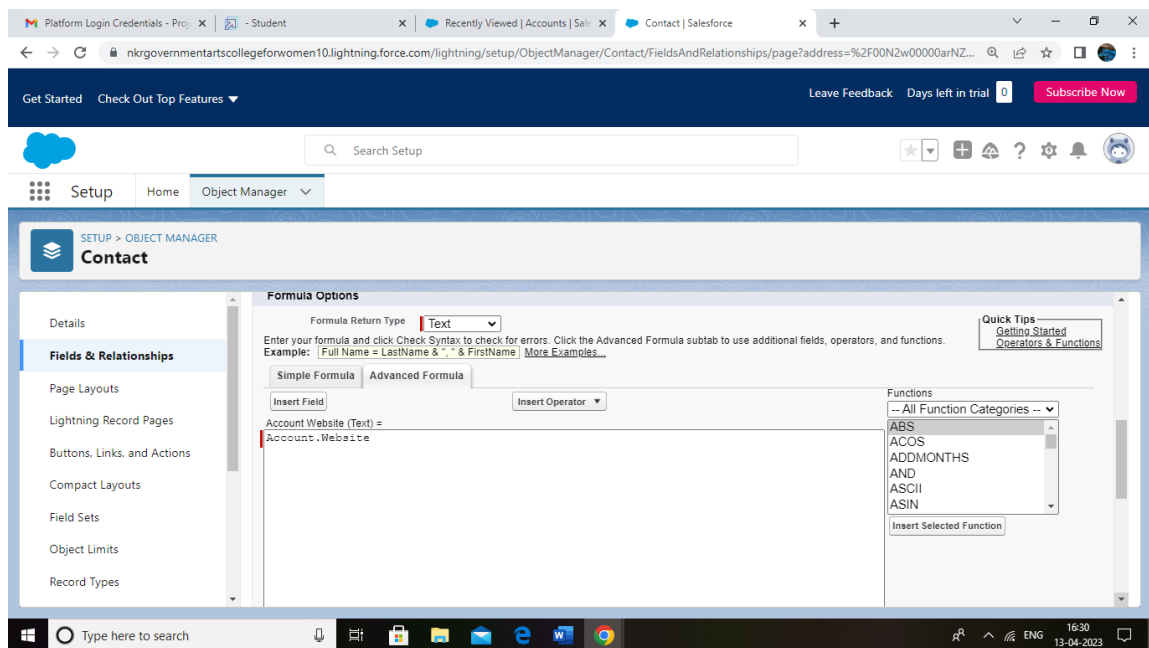
#### Activity-1:

#### Creation of validation rule



## Activity-2:

### Creation of cross object formula

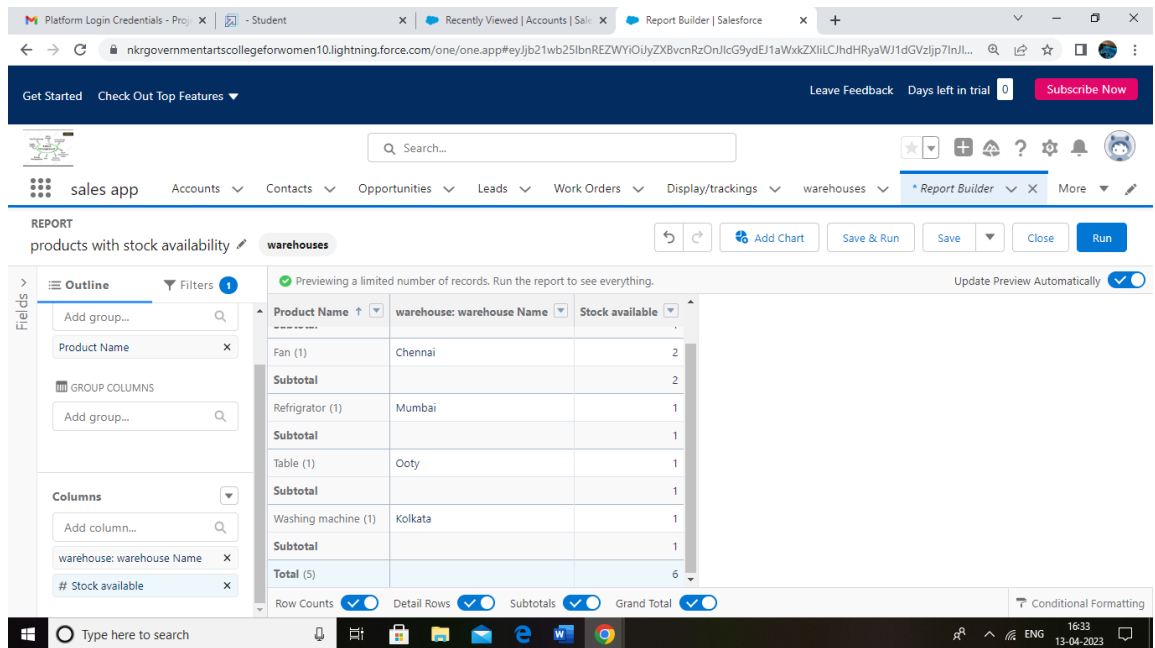


## Milestone-7

### Reports

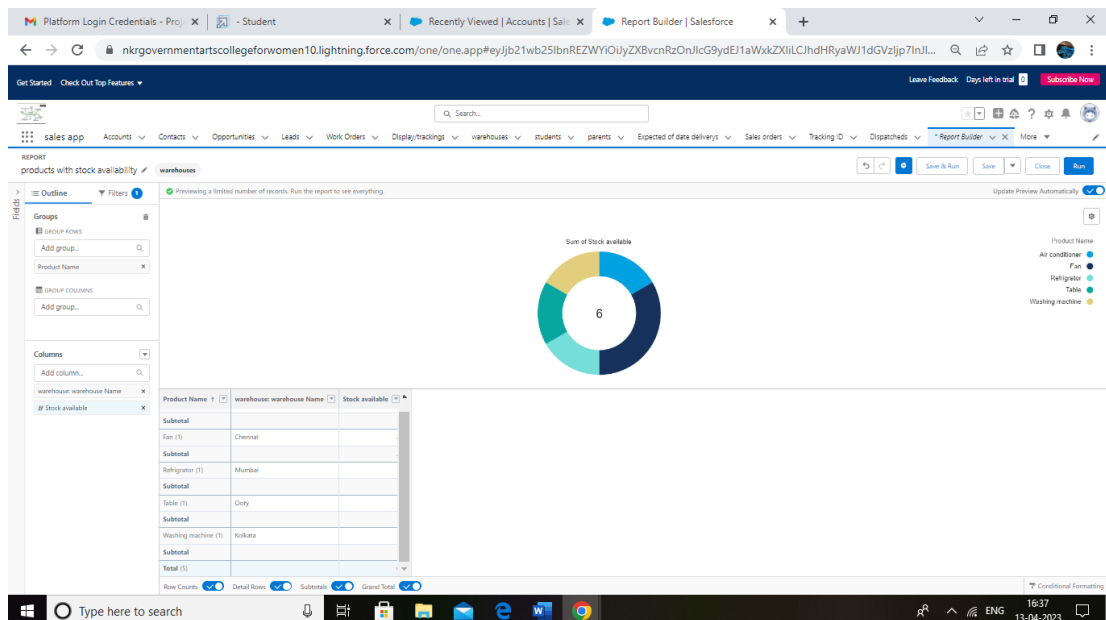
## Activity:

### Creation of report



## Milestone-8 Dashboards:

### Activity Creation of Dashboard





### **3 TrailheadProfilePublicURL**

**Team Leader :<https://trailblazer.me/id/unalinig>**

**Team Member 1:<https://trailblazer.me/id/aparkavi>**

**Team Member 2:<https://trailblazer.me/id/cpravin1>**

**Team Member 3:<https://trailblazer.me/id/pindhumathi>**

## 5 **ADVANTAGES&DISADVANTAGES**

### **ADVANTAGES**

- **Requires less capital**
- **More profit margin than wholesalers**
- **Better customer relation**
- **Credit facility**
- **No liability towards the buyers**

### **DISADVANTAGES**

- **More marketing costs**
- **Requires Good selling skill is required**
- **High competition**
- **No benefit of bulk buying**

## 6 **APPLICATIONS**

\* It helps to store custom data which the retailer can then use to reach out of customers.

\* Through email with personalized offers or with mail offers.

\* When at the check –out process retailers can search up the customers information to make their experience efficient and quick.

## 7 **CONCLUSION**

\* Retailing thus enjoys many unique features inefficiency in retailers leads to lower profitability of the retailers and lower service outputs for consumers.

\* Steps to strengthen the position of the retailing industry must be taken. Such steps may include establishment of retailers cooperatives, merger and buyout.

\* Use of technology to the greatest possible extent , setting up of non-store retailing centers and increase in franchise network.

## 8 **FUTURE SCOPE**

\* The future of retail will feature a high level of online penetration. The best suppliers will establish direct to consumer relationships , where retailers will no longer save as the gatekeeper to the customer.

\* Retailing has a very wide scope. It is one of the fastest growing

# ProjectReportTemplate

industries in India and is providing employment opportunities to many people with the increase purchasing power of the people.