

## Project report template

### 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. A Retail Manager is expected to address consumers' problems, monitor retail orders, handle merchandising, manage HR and also supervise the stocks/inventory and supply chain management.

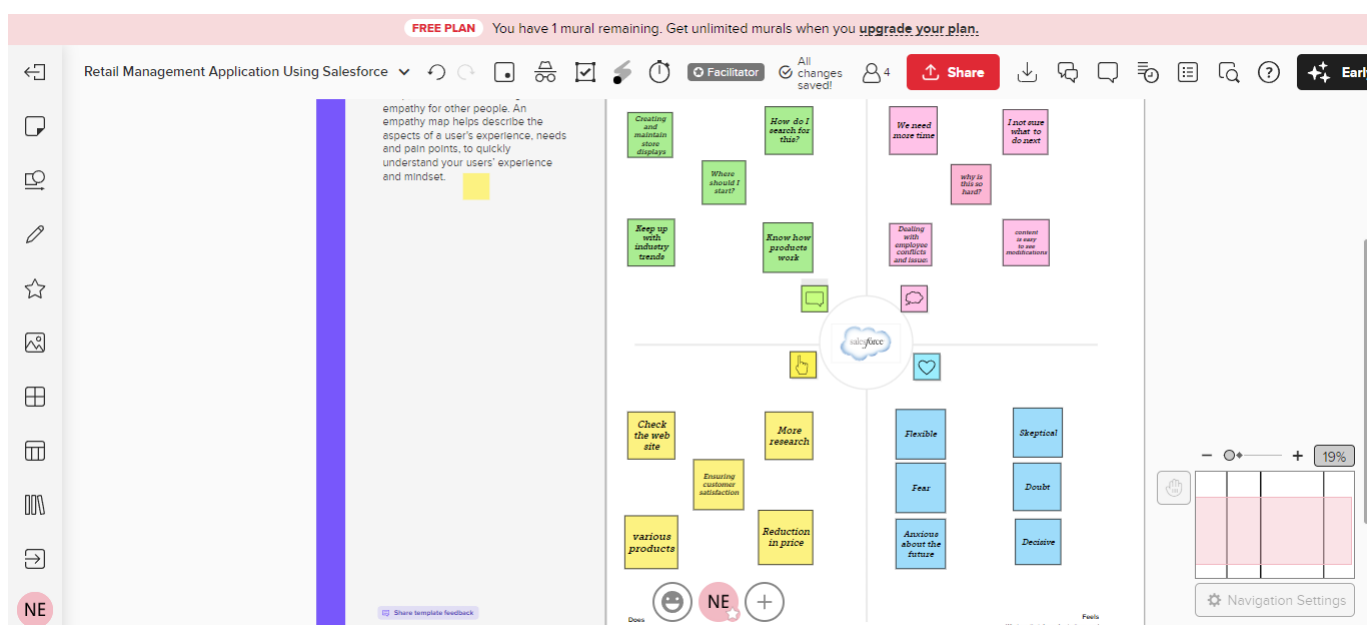
#### 1.2 Purpose

Retail management optimizes internal processes such as inventory management, offline and online storefronts, warehouse operations, payment and accounting, and human resources. Retail management improves overall company cohesion. Retail store management improves customer experience and boosts customer satisfaction.

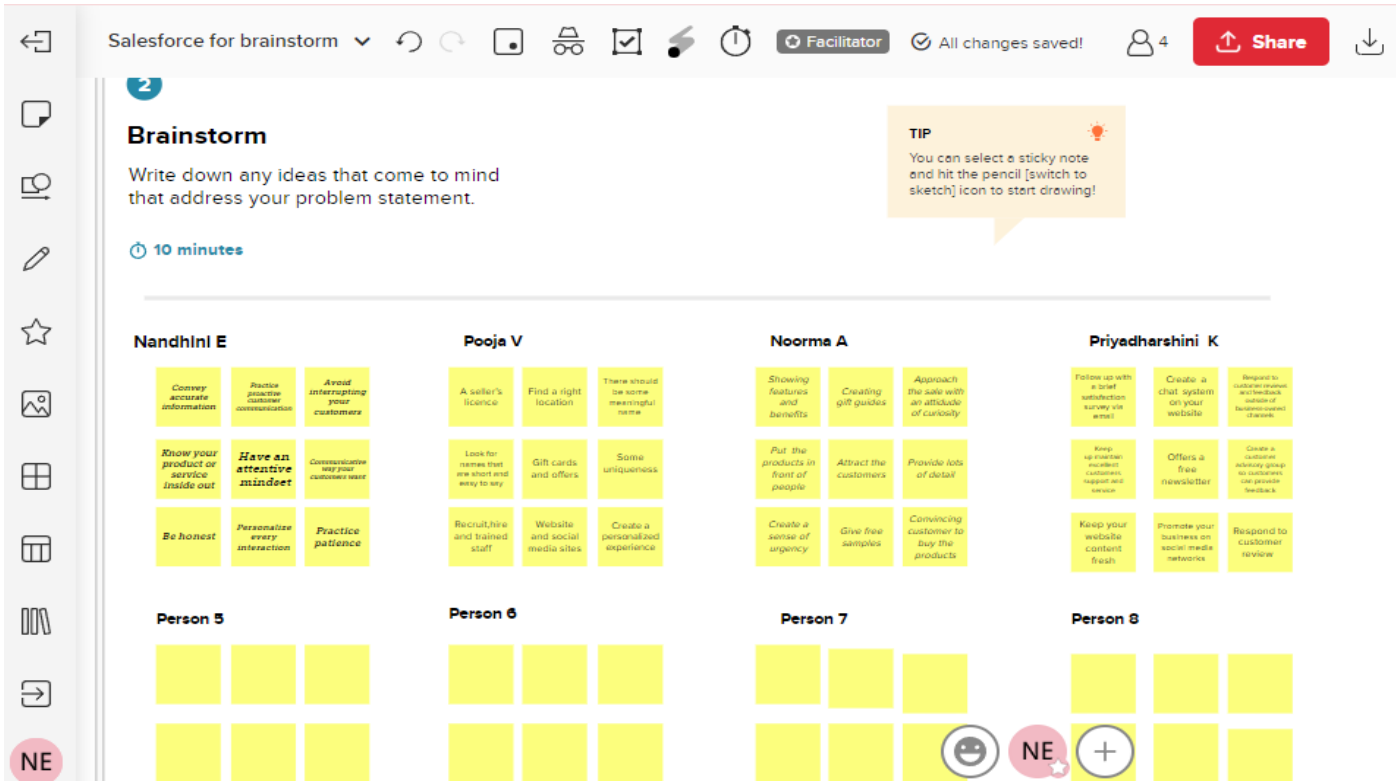
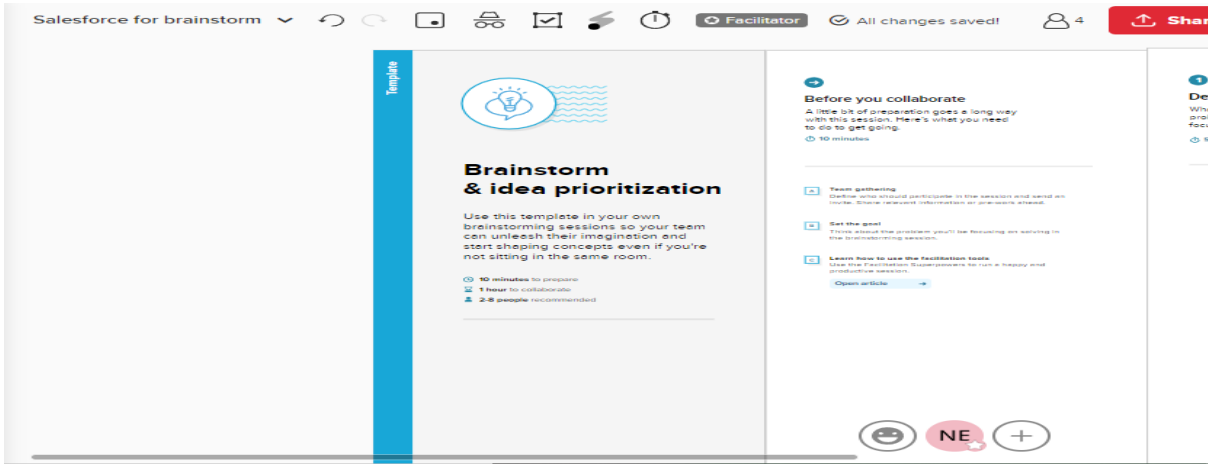
A retail management CRM ( Customer Relations Management) software is a tool to automate the customer interactions data in the retails store. This software stores information about the customer purchase history and the coupon utilisation. This could help us in predicting the buying tendency and the requirement of customer in near future and send personalised information about particular product offers to customer.

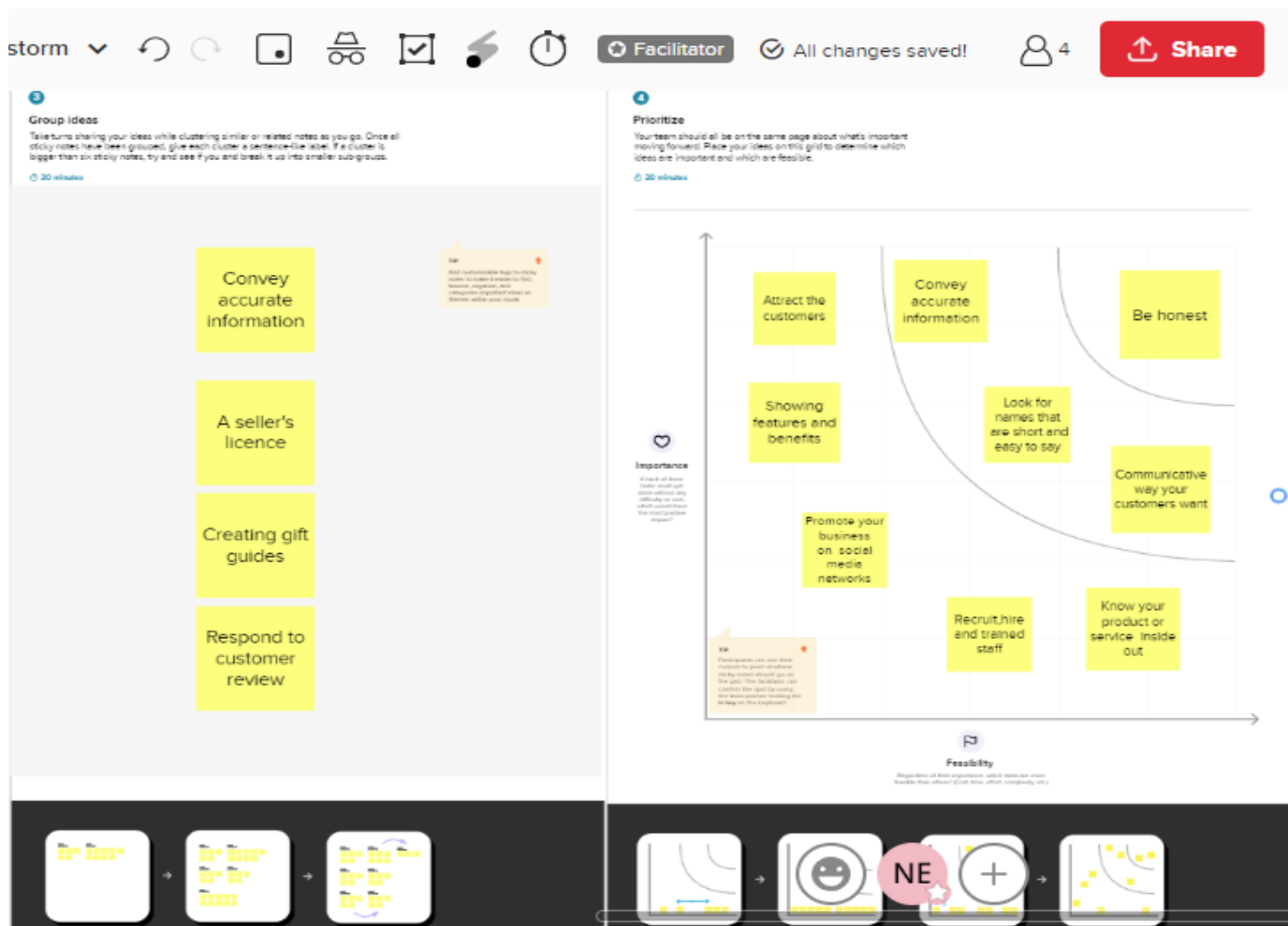
### 2. PROBLEM DEFINITION & DESIGN THINKING :

#### 2.1 Empathy Map



2.2 Ideation & Brainstorming Map





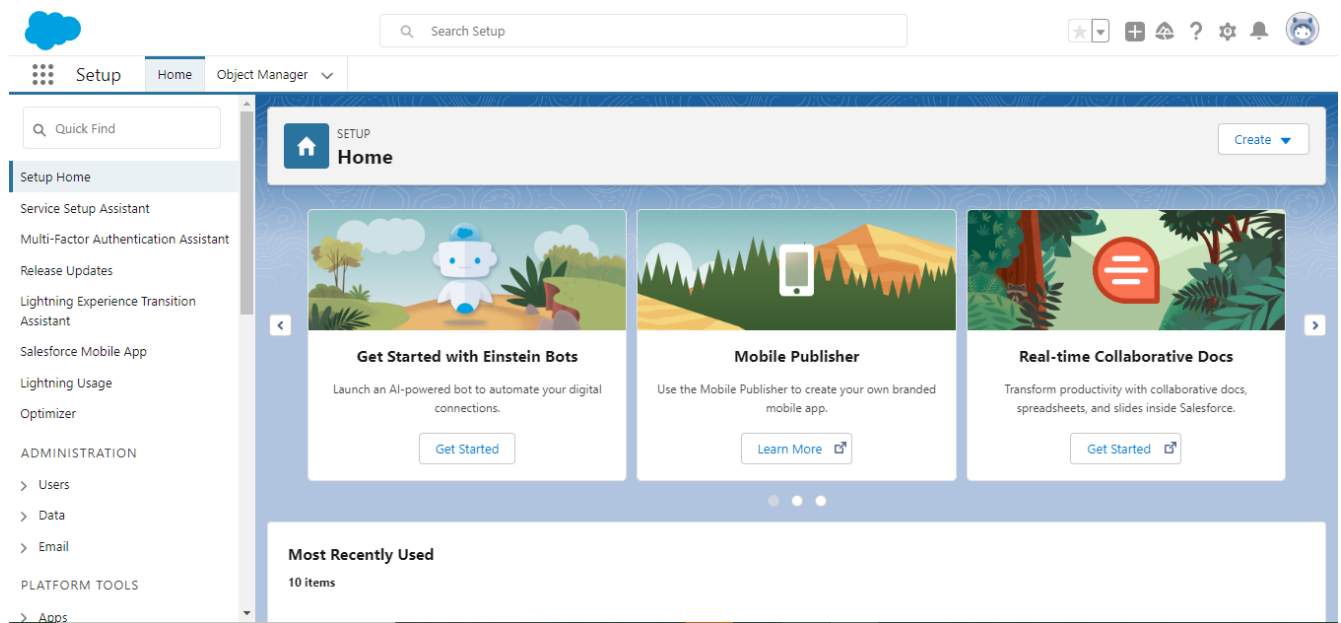
### 3. Result:

#### 3.1 Data Model

Object Name	Fields in the object	
Object 1	Field label	Data type
	Account name	Name
Object 2	Field label	Data type
	Contact Owner	Lookup (user)

#### 3.2 Activity & Screenshot

## Create Salesforce Org-creating Developer account



## Object Manager:

The screenshot shows the Salesforce Object Manager page. The top navigation bar is identical to the Setup Home page. The "Object Manager" tab is active in the sub-navigation. The left sidebar shows the "Object Manager" section with a "Quick Find" search bar and buttons for "Schema Builder" and "Create". The main content area displays a table of objects, sorted by label. The table has columns for LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The "Applicant" object is highlighted, showing it is a Custom Object last modified on 10/04/2023 and is deployed.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Account	Standard Object			
Account Team Member	AccountTeamMember	Standard Object			
Activity	Activity	Standard Object			
Alternative Payment Method	AlternativePaymentMethod	Standard Object			
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object			
Applicant	Applicant_c	Custom Object		10/04/2023	✓
Asset	Asset	Standard Object			
Asset Action	AssetAction	Standard Object			
Asset Action Source	AssetActionSource	Standard Object			
Asset Relationship	AssetRelationship	Standard Object			

➤ Account object

Cloud logo

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

### Account

**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	Account
Custom	
Singular Label	Account
Plural Label	Accounts
Enable Reports	
Track Activities	
Track Field History	
Deployment Status	
Help Settings	Standard salesforce.com Help Window

## ➤ Contact object

Cloud logo

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

### Contact

**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

**Details**

Description	
API Name	Contact
Custom	
Singular Label	Contact
Plural Label	Contacts
Enable Reports	
Track Activities	
Track Field History	
Deployment Status	
Help Settings	Standard salesforce.com Help Window

## ➤ Energy object

You are now enrolled x Dependent PL Report x Create a Simple Cust x Home | Salesforce x Energy Audit | Salesforce x Reports | Salesforce x

mindful-koala-8q5v0d-dev-ed.trailblaze.lightning.force.com/lightning/setup/ObjectManager/0112w00000400KJ/Details/view

Cloud logo

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

### Energy Audit

**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

**Details**

Description	
API Name	Energy_Audit_c
Custom	✓
Singular Label	Energy Audit
Plural Label	Energy Audits
Enable Reports	✓
Track Activities	✓
Track Field History	✓
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

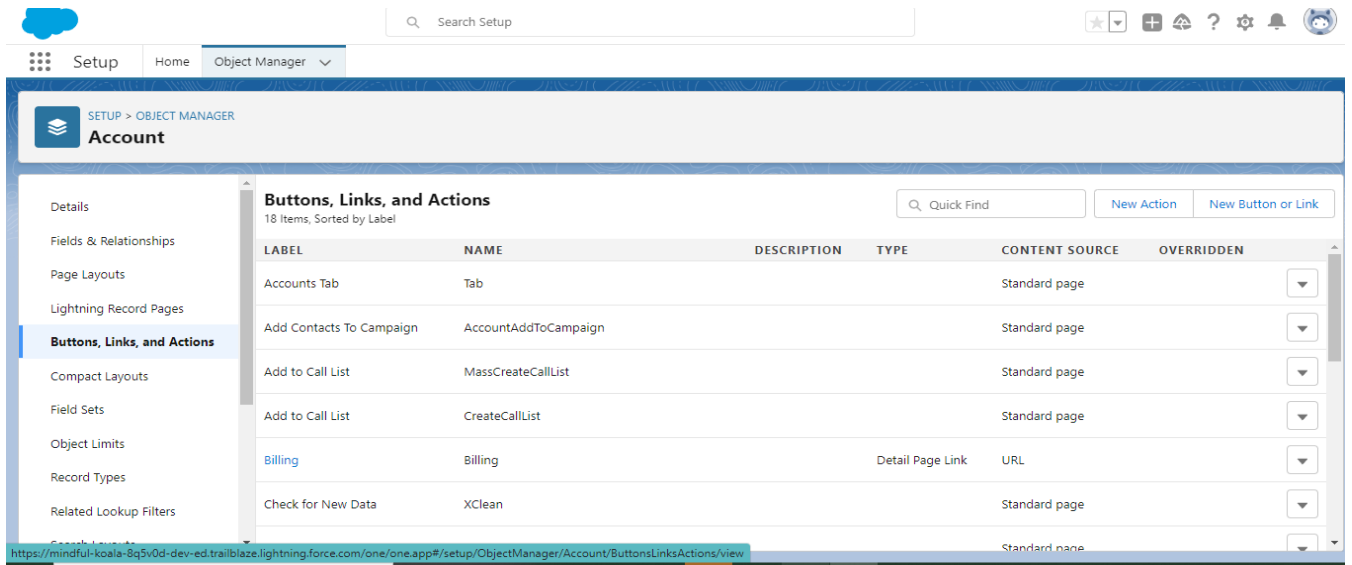
Edit Delete

https://mindful-koala-8q5v0d-dev-ed.trailblaze.lightning.force.com/one/one.app#/setup/ObjectManager/0112w00000400KJ/CompactLayouts/view

Type here to search

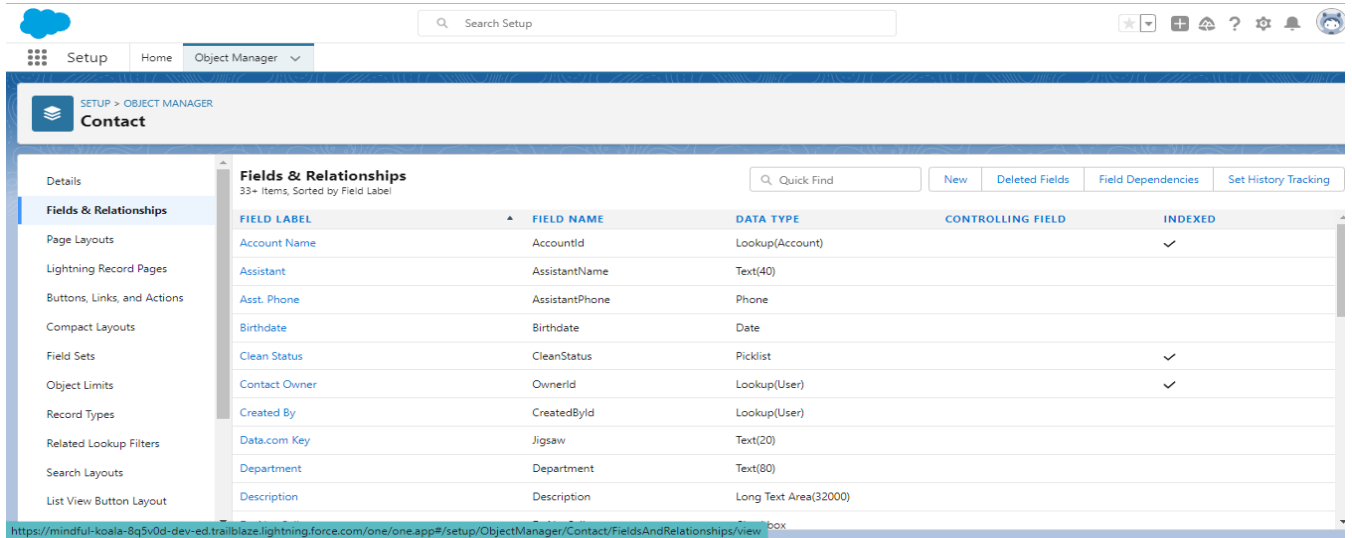
19:58 12-04-2023

## Creation of Fields & Relationship



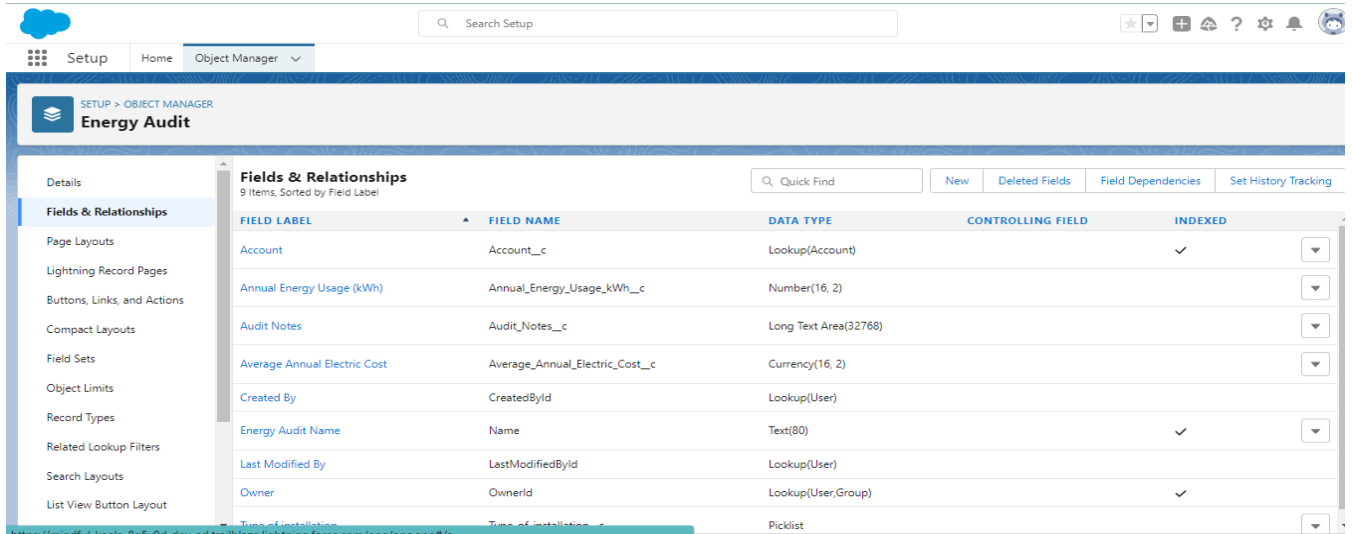
This screenshot shows the 'Buttons, Links, and Actions' configuration page for the 'Account' object in Salesforce Setup. The left sidebar lists various setup options, with 'Buttons, Links, and Actions' selected. The main content area displays a table of 18 items, sorted by label. The table has columns for Label, Name, Description, Type, Content Source, and Overridden. The 'Billing' link is highlighted in blue.

LABEL	NAME	DESCRIPTION	TYPE	CONTENT SOURCE	OVERRIDDEN
Accounts Tab	Tab			Standard page	
Add Contacts To Campaign	AccountAddToCampaign			Standard page	
Add to Call List	MassCreateCallList			Standard page	
Add to Call List	CreateCallList			Standard page	
Billing	Billing		Detail Page Link	URL	
Check for New Data	XClean			Standard page	
				Standard page	



This screenshot shows the 'Fields & Relationships' configuration page for the 'Contact' object in Salesforce Setup. The left sidebar lists various setup options, with 'Fields & Relationships' selected. The main content area displays a table of 33+ items, sorted by field label. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The 'Account Name' field is highlighted in blue.

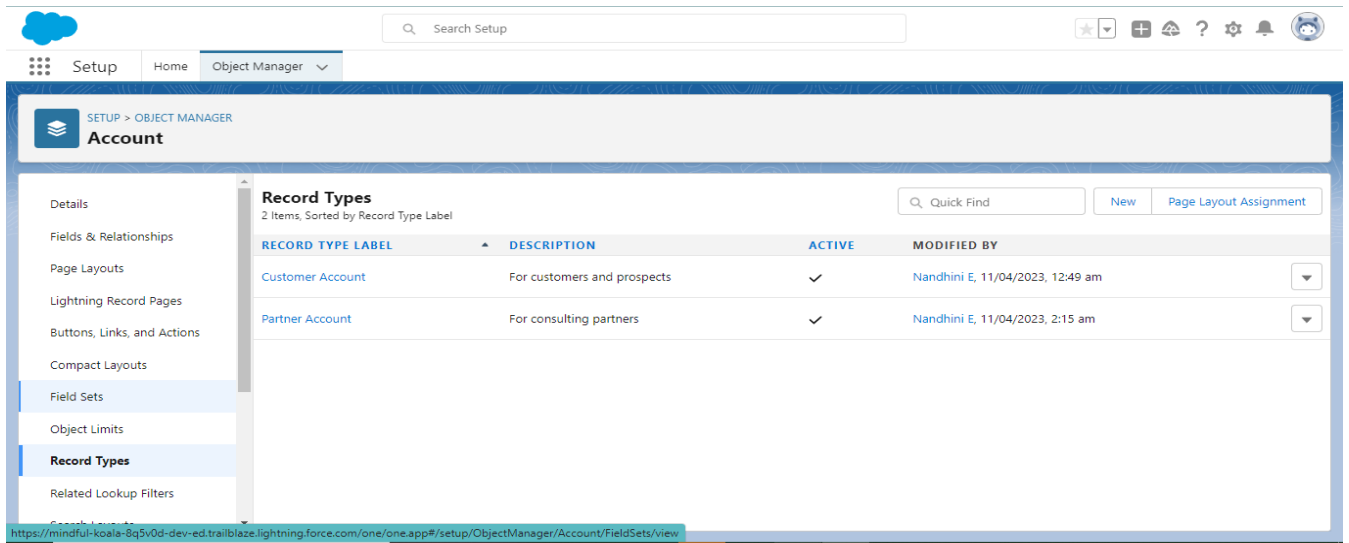
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Account Name	Accountid	Lookup(Account)		✓
Assistant	AssistantName	Text(40)		
Asst. Phone	AssistantPhone	Phone		
Birthdate	Birthdate	Date		
Clean Status	CleanStatus	Picklist		✓
Contact Owner	OwnerId	Lookup(User)		✓
Created By	CreatedById	Lookup(User)		
Data.com Key	Jigsaw	Text(20)		
Department	Department	Text(80)		
Description	Description	Long Text Area(32000)		



This screenshot shows the 'Fields & Relationships' configuration page for the 'Energy Audit' object in Salesforce Setup. The left sidebar lists various setup options, with 'Fields & Relationships' selected. The main content area displays a table of 9 items, sorted by field label. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The 'Account' field is highlighted in blue.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Account	Account__c	Lookup(Account)		✓
Annual Energy Usage (kWh)	Annual_Energy_Usage_kWh__c	Number(16, 2)		
Audit Notes	Audit_Notes__c	Long Text Area(32768)		
Average Annual Electric Cost	Average_Annual_Electric_Cost__c	Currency(16, 2)		
Created By	CreatedById	Lookup(User)		
Energy Audit Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Time of Installation	Time_of_installation__c	Picklist		

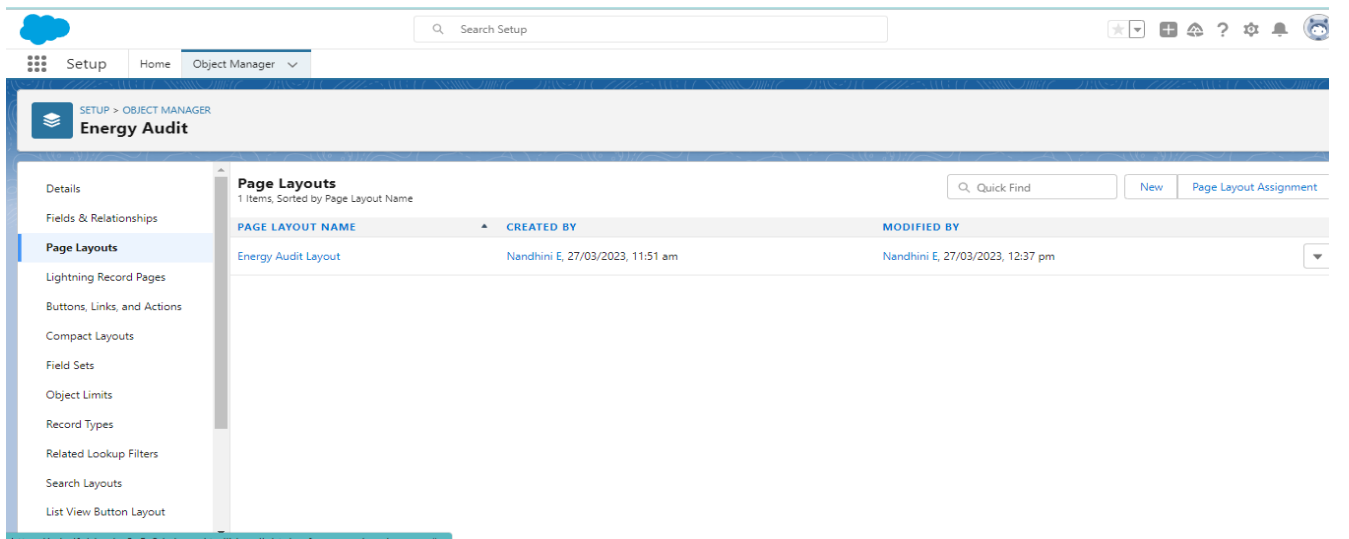
## Creation of page layouts



This screenshot shows the 'Record Types' page for the 'Account' object in Salesforce Setup. The left sidebar lists navigation options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types (selected), and Related Lookup Filters. The main content area shows a table of record types with columns: RECORD TYPE LABEL, DESCRIPTION, ACTIVE, and MODIFIED BY. There are 2 items listed.

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Customer Account	For customers and prospects	✓	Nandhini E, 11/04/2023, 12:49 am
Partner Account	For consulting partners	✓	Nandhini E, 11/04/2023, 2:15 am

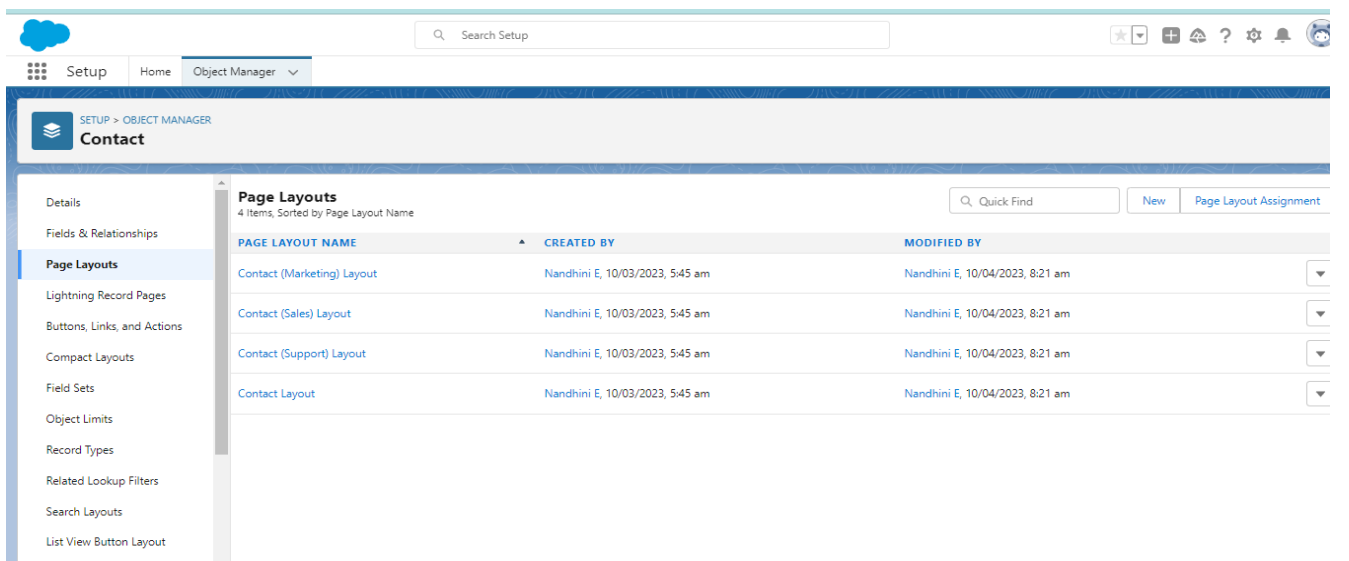
URL: <https://mindful-koala-8q5v0d-dev-ed.trailblaze.lightning.force.com/one/one.app#/setup/ObjectManager/Account/FieldSets/view>



This screenshot shows the 'Page Layouts' page for the 'Energy Audit' object in Salesforce Setup. The left sidebar lists navigation options: Details, Fields & Relationships, Page Layouts (selected), 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. The main content area shows a table of page layouts with columns: PAGE LAYOUT NAME, CREATED BY, and MODIFIED BY. There is 1 item listed.

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Energy Audit Layout	Nandhini E, 27/03/2023, 11:51 am	Nandhini E, 27/03/2023, 12:37 pm

URL: <https://mindful-koala-8q5v0d-dev-ed.trailblaze.lightning.force.com/one/one.app#/setup/ObjectManager/EnergyAudit/PageLayouts/view>



This screenshot shows the 'Page Layouts' page for the 'Contact' object in Salesforce Setup. The left sidebar lists navigation options: Details, Fields & Relationships, Page Layouts (selected), 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. The main content area shows a table of page layouts with columns: PAGE LAYOUT NAME, CREATED BY, and MODIFIED BY. There are 4 items listed.

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Contact (Marketing) Layout	Nandhini E, 10/03/2023, 5:45 am	Nandhini E, 10/04/2023, 8:21 am
Contact (Sales) Layout	Nandhini E, 10/03/2023, 5:45 am	Nandhini E, 10/04/2023, 8:21 am
Contact (Support) Layout	Nandhini E, 10/03/2023, 5:45 am	Nandhini E, 10/04/2023, 8:21 am
Contact Layout	Nandhini E, 10/03/2023, 5:45 am	Nandhini E, 10/04/2023, 8:21 am

# Creation of Record Type

Congratulations, Nandhini - xTrailhead | The fun way to learn xCreate a Simple Custom Rep xHome | Salesforce xAccount | Salesforce x

mindful-koala-8q5v0d-dev-ed.trailblaze.lightning.force.com/lightning/setup/ObjectManager/Account/RecordTypes/view

GmailYouTubeMapsProfile - Student

Search Setup

SetupHomeObject Manager

SETUP > OBJECT MANAGER

Account

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

Visual Builder

Record Types

2 Items, Sorted by Record Type Label

Quick Find

New

Page Layout Assignment

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Customer Account	For customers and prospects	✓	Nandhini E, 11/04/2023, 12:49 am
Partner Account	For consulting partners	✓	Nandhini E, 11/04/2023, 2:15 am

Type here to search

07:2313-04-2023

# Creation of Validation Rules

Congratulations, Nandhini - xTrailhead | The fun way to learn xCreate a Simple Custom Rep xHome | Salesforce xAccount | Salesforce x

mindful-koala-8q5v0d-dev-ed.trailblaze.lightning.force.com/lightning/setup/ObjectManager/Account/ValidationRules/view

GmailYouTubeMapsProfile - Student

Search Setup

SetupHomeObject Manager

SETUP > OBJECT MANAGER

Account

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

Visual Builder

Validation Rules

1 Items, Sorted by Rule Name

New

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Support_plan_expiration_date_required	Support Plan Expiration Date	You must enter an expiration date when an account has a support plan	✓	Nandhini E, 11/04/2023, 2:49 am

Type here to search

07:2313-04-2023



Cloud logo Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER  
Contact

Validation, Error, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Hierarchy Columns

Scoping Rules

Triggers

Flow Triggers

Validation Rules

**Validation Rules**  
1 Items, Sorted by Rule Name

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Contact_must_be_in_Account_ZIP_Code	Top of Page	no errors	✓	Nandhini E, 11/04/2023, 7:27 am

https://mindful-koala-8q5v0d-dev-ed.trailblaze.lightning.force.com/one/one.app#...

## Creation of Sales

Cloud logo Search...

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

**Quarterly Performance**

CLOSED ₹36,45,000 OPEN (>70%) ₹7,65,000 GOAL --

Legend: Closed (Orange), Goal (Green), Closed + Open (>70%) (Blue)

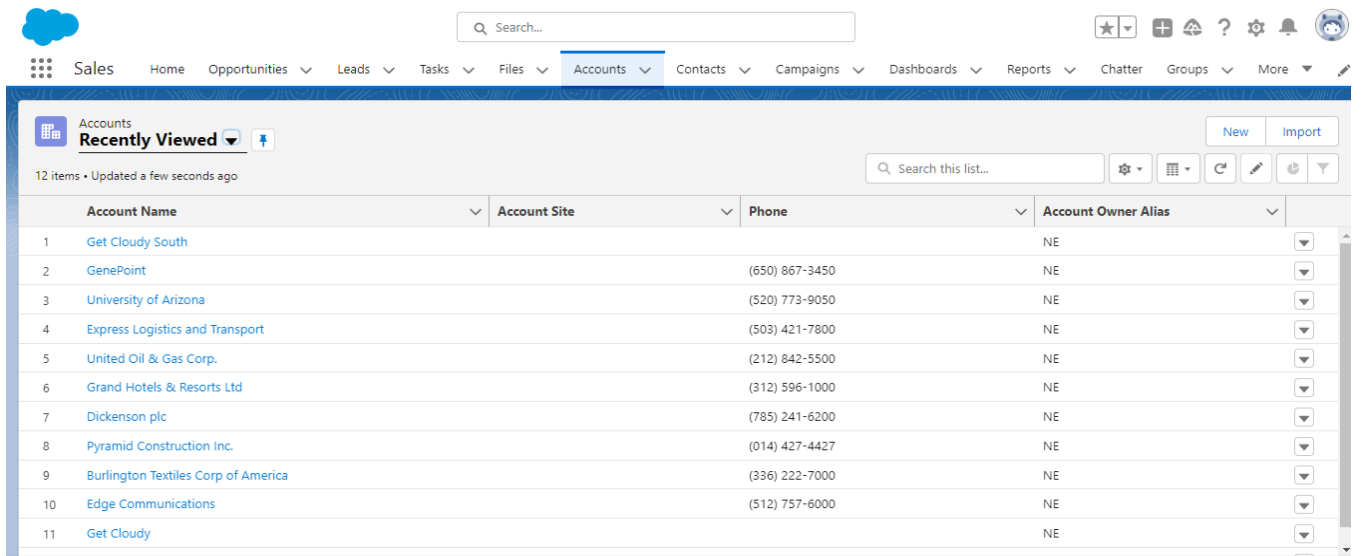
**Assistant**

- > 30 days without any activity  
[Dickenson Mobile Generators](#)
- > 30 days without any activity  
[United Oil Office Portable Generators](#)
- > 30 days without any activity  
[Grand Hotels Kitchen Generator](#)
- > 30 days without any activity  
[United Oil Refinery Generators](#)
- > 30 days without any activity  
[Grand Hotels Guest Portable Generators](#)
- > 30 days without any activity  
[Pyramid Emergency Generators](#)
- > 30 days without any activity  
[Express Logistics Portable Truck Generators](#)

Today's Events To Do List

Today's Tasks

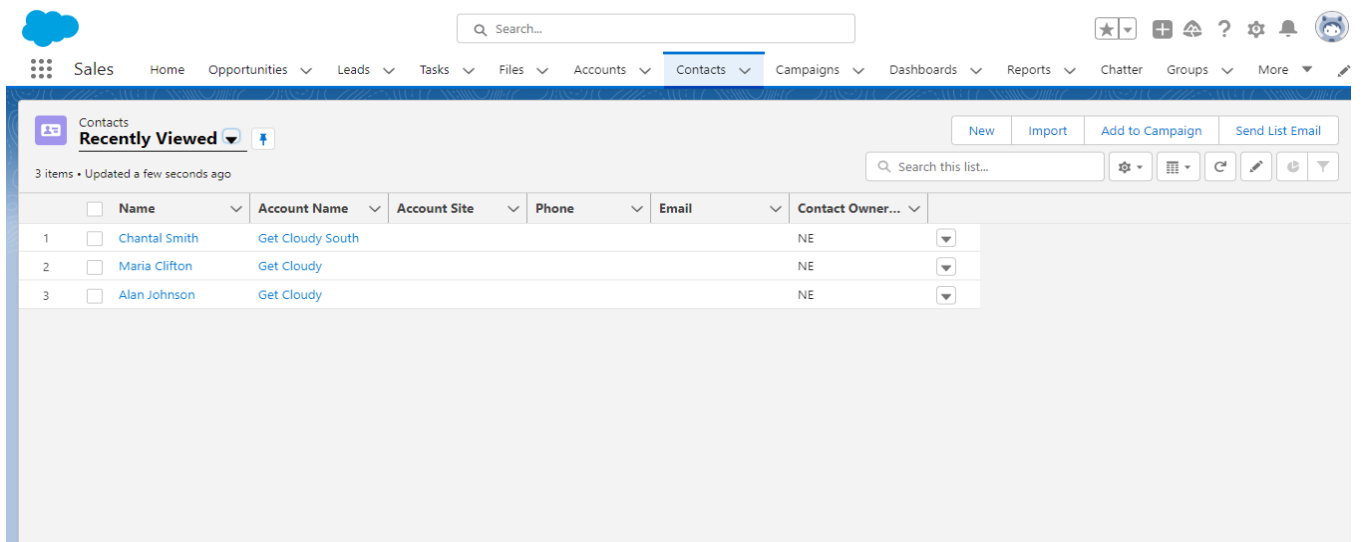
## Creation of Accounts in Sales



This screenshot shows the 'Accounts' page in Salesforce. The top navigation bar includes 'Sales', 'Home', 'Opportunities', 'Leads', 'Tasks', 'Files', 'Accounts' (selected), 'Contacts', 'Campaigns', 'Dashboards', 'Reports', 'Chatter', 'Groups', and 'More'. The 'Accounts' section is titled 'Recently Viewed' and shows a list of 12 accounts. The table columns are 'Account Name', 'Account Site', 'Phone', and 'Account Owner Alias'. The accounts listed are: Get Cloudy South, GenePoint, University of Arizona, Express Logistics and Transport, United Oil & Gas Corp., Grand Hotels & Resorts Ltd, Dickenson plc, Pyramid Construction Inc., Burlington Textiles Corp of America, Edge Communications, and Get Cloudy.

	Account Name	Account Site	Phone	Account Owner Alias
1	Get Cloudy South			NE
2	GenePoint		(650) 867-3450	NE
3	University of Arizona		(520) 773-9050	NE
4	Express Logistics and Transport		(503) 421-7800	NE
5	United Oil & Gas Corp.		(212) 842-5500	NE
6	Grand Hotels & Resorts Ltd		(312) 596-1000	NE
7	Dickenson plc		(785) 241-6200	NE
8	Pyramid Construction Inc.		(014) 427-4427	NE
9	Burlington Textiles Corp of America		(336) 222-7000	NE
10	Edge Communications		(512) 757-6000	NE
11	Get Cloudy			NE

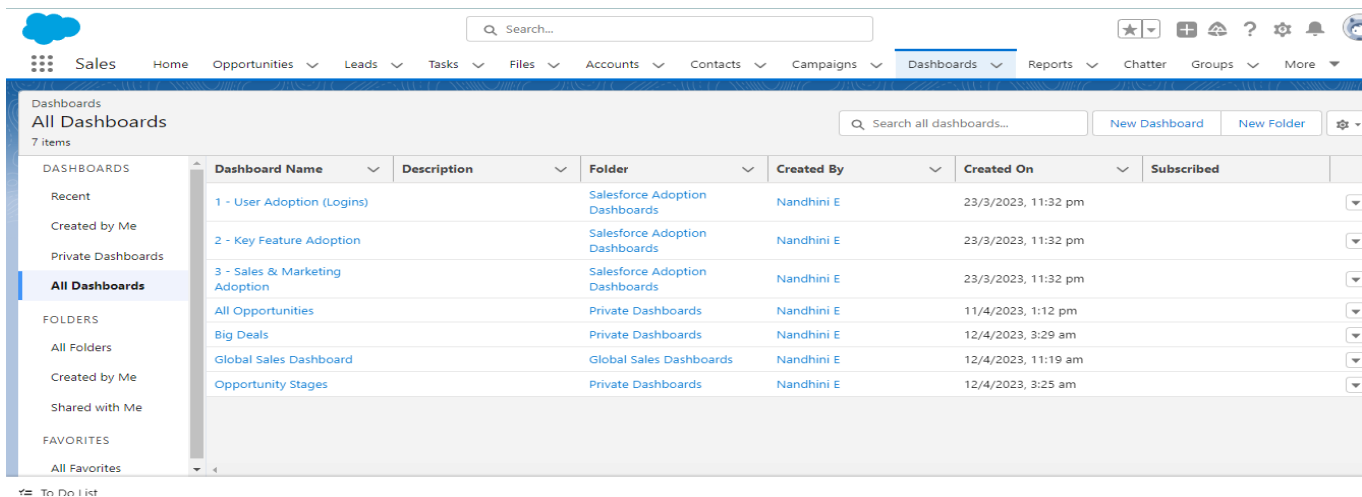
## Creation of Contacts in Sales



This screenshot shows the 'Contacts' page in Salesforce. The top navigation bar is the same as the Accounts page. The 'Contacts' section is titled 'Recently Viewed' and shows a list of 3 contacts. The table columns are 'Name', 'Account Name', 'Account Site', 'Phone', 'Email', and 'Contact Owner...'. The contacts listed are: Chantal Smith (Get Cloudy South), Maria Clifton (Get Cloudy), and Alan Johnson (Get Cloudy).

	Name	Account Name	Account Site	Phone	Email	Contact Owner...
1	Chantal Smith	Get Cloudy South				NE
2	Maria Clifton	Get Cloudy				NE
3	Alan Johnson	Get Cloudy				NE

## Creation of Dashboards in Sales



This screenshot shows the 'Dashboards' page in Salesforce. The top navigation bar is the same as the previous pages. The 'Dashboards' section is titled 'All Dashboards' and shows a list of 7 dashboards. The table columns are 'Dashboard Name', 'Description', 'Folder', 'Created By', 'Created On', and 'Subscribed'. The dashboards listed are: 1 - User Adoption (Logins), 2 - Key Feature Adoption, 3 - Sales & Marketing Adoption, All Opportunities, Big Deals, Global Sales Dashboard, and Opportunity Stages.

	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
1	1 - User Adoption (Logins)		Salesforce Adoption Dashboards	Nandhini E	23/3/2023, 11:32 pm	
2	2 - Key Feature Adoption		Salesforce Adoption Dashboards	Nandhini E	23/3/2023, 11:32 pm	
3	3 - Sales & Marketing Adoption		Salesforce Adoption Dashboards	Nandhini E	23/3/2023, 11:32 pm	
4	All Opportunities		Private Dashboards	Nandhini E	11/4/2023, 1:12 pm	
5	Big Deals		Private Dashboards	Nandhini E	12/4/2023, 3:29 am	
6	Global Sales Dashboard		Global Sales Dashboards	Nandhini E	12/4/2023, 11:19 am	
7	Opportunity Stages		Private Dashboards	Nandhini E	12/4/2023, 3:25 am	

Creation of Reports in Sales

Sales

Home

Opportunities

Leads

Tasks

Files

Accounts

Contacts

Campaigns

Dashboards

Reports

Chatter

Groups

More

Q Search...

★

+

🔍

?

⚙️

🔔

👤

Reports

All Reports

55 items

Q Search all reports...

New Report

New Folder

⚙️

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	case status		Private Reports	Nandhini E	11/4/2023, 1:24 pm	
Created by Me	Cases by Status		Public Reports	Nandhini E	11/4/2023, 1:36 pm	
Private Reports	Central and Eastern Target Accounts	Who are our important customers in the Central and Eastern states?	Marketing Reports	Nandhini E	12/4/2023, 9:39 am	
Public Reports	DB-Adoption: New LEADS Last 30 Days	New leads created in the last 30 Days	DB - Adoption	Nandhini E	23/3/2023, 11:32 pm	
All Reports	DB-Adoption: ACCOUNTS w/o Fields Pop	Show me how many accounts do not have key fields populated	DB - Adoption	Nandhini E	23/3/2023, 11:32 pm	
FOLDERS	DB-Adoption: Active User LOGINS	# of Active Users that have logged in the last 14 days	DB - Adoption	Nandhini E	23/3/2023, 11:32 pm	
All Folders	DB-Adoption: Active USERS	# of Active Users	DB - Adoption	Nandhini E	23/3/2023, 11:32 pm	
Created by Me	DB-Adoption: CAMPAIGNS by	Status of all campaigns on a	DB - Adoption	Nandhini E	23/3/2023, 11:32 pm	
Shared with Me						
FAVORITES						

To Do List

Profile

Creation on Profile

Sales

Home

Opportunities

Leads

Tasks

Files

Accounts

Contacts

Campaigns

Dashboards

Reports

Chatter

Groups

People

More

Q Search...

★

+

🔍

?

⚙️

🔔

👤

Nandhini E

Edit

User Detail

Share your awesomeness with the world.  
(Or at least with your colleagues on Chatter.)

TRAILHEAD

Learn new skills on Trailhead, the fun way to learn Salesforce.

Connect with fellow Trailblazers on the Trailblazer Community.

Details

Name

Nandhini E

Title

Manager

Company Name

Related

Groups (0)

Creation of Users

App Launcher

Energy Audits

Users

Favorites

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

Permission Sets

Permission Set Groups

User Management Settings

Profiles

All Users

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	admin_quest	questadm	nandhuquestadmin@abc.com		<input type="checkbox"/>	System Administrator
<input type="checkbox"/>   Edit	Chatter Expert	Chatter	chatty.00d2w00000rjzzmeal.fqugdxf2vtfi@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>   Edit   Login	Daniels, Amy	adani	nandhini@gokul.com	Sales Engineer	<input checked="" type="checkbox"/>	Standard Profile - No Acct Delete
<input type="checkbox"/>   Edit	E. Nandhini	NE	enandhini2003@mindful-koala-8g5v0d.com	CEO	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>   Edit	questadmin	quest	quest0002@admin@gmail.com		<input type="checkbox"/>	System Administrator
<input type="checkbox"/>   Edit   Login	Jackson, Eric Jackson	ejack	jackson@1111gmail.com		<input checked="" type="checkbox"/>	Minimum Access - Salesforce
<input type="checkbox"/>   Edit	Kim, Ted	tkim	nandhu@nandu04.com	Recruiter	<input type="checkbox"/>	Standard Profile - No Acct Delete
<input type="checkbox"/>   Edit   Login	Larkin, Noah	nlark	sumathi@nandhu.com	VP of Services	<input checked="" type="checkbox"/>	Standard Profile - No Acct Delete
<input type="checkbox"/>   Edit	Lorette, Maya	mlorr	nandhu@nandhini20.com	Accounts Receivable	<input type="checkbox"/>	Standard Profile - No Acct Delete
<input type="checkbox"/>   Edit   Login	Singh, Anuj Singh	asing	singh@1111gmail.com		<input checked="" type="checkbox"/>	Force.com - Free User
<input type="checkbox"/>   Edit	User Integration	integ	integration@00d2w00000rjzzmeal.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>   Edit	User Security	sec	insightssecurity@00d2w00000rjzzmeal.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Show me fewer records per list page

New User

Reset Password(s)

Add Multiple Users

## Creation of Permission Sets

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

Permission Sets

Permission Set Groups

User Management Settings

Permission Sets

On this page you can create, view, and manage permission sets.

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

All | Edit | Delete | Create New View

New

f

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

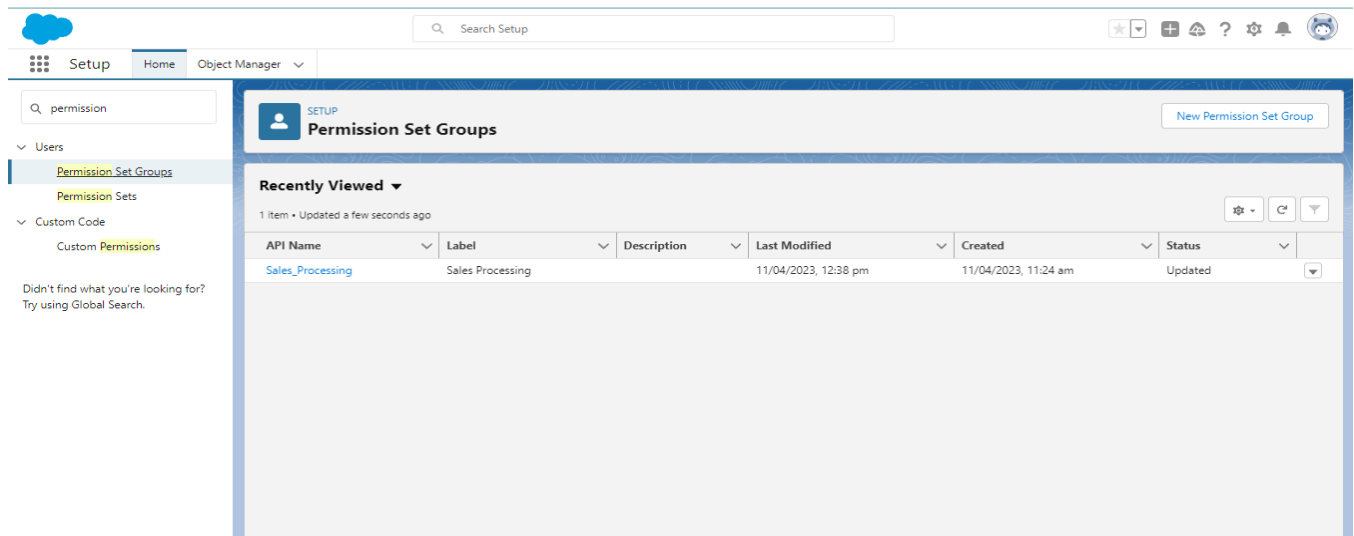
Action	Permission Set Label	Description	License
<input type="checkbox"/> Clone	Buyer	Allows access to the store. Lets users see products and c...	B2B Buyer Permission Set One Seat
<input type="checkbox"/> Clone	Buyer Manager	Includes all Buyer capabilities, and allows access to man...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/> Clone	CRM User	Denotes that the user is a Sales Cloud or Service Cloud ...	CRM User
<input type="checkbox"/> Clone	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
<input type="checkbox"/> Del   Clone	Delete Accounts	Grants Delete Accounts permission	Salesforce Platform
<input type="checkbox"/> Clone	FieldServiceMobileStandardPermSet	Give your mobile workforce access to the Field Service m...	Field Service Mobile
<input type="checkbox"/> Del   Clone	Knowledge LSF Permission Set	Grants CRUD permission for Knowledge, as well as Kno...	
<input type="checkbox"/> Clone	Merchandiser	Allow access to commerce merchandising features.	Commerce Merchandiser User Permission Set License S...
<input type="checkbox"/> Del   Clone	Rating		Salesforce
<input type="checkbox"/> Clone	Sales Cloud User	Denotes that the user is a Sales Cloud user.	Sales User
<input type="checkbox"/> Del   Clone	Sales Contracts		

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## Creation of permission Sets Group



## Creation of Company information

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- Holidays
- Language Settings
- Data Protection and Privacy

**Company Information**  
**Salesforce associates**

The organization's profile is below.

[User Licenses \(10+\)](#) | [Permission Set Licenses \(10+\)](#) | [Feature Licenses \(13\)](#) | [Usage-based Entitlements \(10+\)](#)

**Organization Detail** [Edit](#) [Deactivate Org](#)

Organization Name	Salesforce associates	Phone	
Primary Contact	Nandhini E	Fax	
Division		Default Locale	English (United States)
Address	123 Secret Street Baltimore 21201 Maryland US	Default Language	English
Fiscal Year Starts In	February	Default Time Zone	(GMT-07:00) Mountain Standard Time (America/Phoenix)
Activate Multiple Currencies	<input type="checkbox"/>	Improve DATEVALUE() accuracy for DST	<input type="checkbox"/>
Enable Data Translation	<input type="checkbox"/>	Currency Locale	English (India) - INR
Newsletter	<input checked="" type="checkbox"/>	Used Data Space	406 KB (8%) <a href="#">View</a>
Admin Newsletter	<input checked="" type="checkbox"/>	Used File Space	22 KB (0%) <a href="#">View</a>
Hide Notices About System Maintenance	<input type="checkbox"/>	API Requests, Last 24 Hours	82 (15,000 max)
Hide Notices About System Downtime	<input type="checkbox"/>	Streaming API Events, Last 24 Hours	0 (10,000 max)
		Restricted Logins, Current Month	0 (0 max)
		Salesforce.com Organization ID	00D2v00000RJzZm
		Organization Edition	Developer Edition
		Instance	AP16
		Modified By	Nandhini E, 07/04/2023, 10:07 am

Created By [Nandhini E](#), 10/03/2023, 5:45 am [Edit](#) [Deactivate Org](#)

## 4. Trailhead Profile public URL:

Team Lead- <https://trailblazer.me/id/poojv9>

Team member 1- <https://trailblazer.me/id/nandu186>

Team member 2- <https://trailblazer.me/id/noorma>

Team member 3- <https://trailblazer.me/id/pdharshinik>

## 5. ADVANTAGES & DISADVANTAGES:

### ➤ **Less Capital Requirement**

It does not require huge investment to start retail business. Retailers buy goods from wholesalers in small large space to store goods. So, retailing can be commenced with little investment.

### ➤ **More Profit Margin**

There is fixed margin of profit for wholesalers. Generally they earn 3% to 8% profit on sale. But there is no fixed margin for retailers, shopkeepers may fix profit margin up to 20% in some cases.

### ➤ **Credit Facility**

Another benefit of retailers is that they get credit facility from wholesalers or dealers. But they sell products on cash which helps to maintain adequate liquidity in the business.

### ➤ **Better Customer Relation**

Retailing is directly linked with the customers. Retailers can understand the interests, preferences and buying behaviour of customers. It helps to build better customer relation and loyalty.

### ➤ **No Liability**

In case of faulty or defective products, they do not need to bear the loss.

## Disadvantages of Retailers

### ➤ **High Marketing Cost**

Retailers should make investment in decoration of shop and display of goods to attract more customers. So, it requires more marketing or advertising cost than wholesalers.

### ➤ **Very High Competition**

Another disadvantage of retailing is that there is tough competition in the market because several retailers sell similar types of products. So, it is difficult to remain in the competitive environment.

### ➤ **No Economics of Buying**

Retailers buy small volume of products from wholesalers, So, they miss the opportunity to enjoy the benefit of economics of buying.

## 6. APPLICATION

Retail management software is technology that helps business owners drive more sales with applications that include point of sale features, inventory management, retail customer relationship management and more. These solutions often include hardware for payment terminals and can support mobile devices.

## 7. CONCLUSION

In this course we have explored the meaning of the terms retailing, marketing and marketing communications. We have also considered the importance of the marketing mix and identified the different communication tools that a retailer might use to interact and communicate with their target customers. You have been introduced to a few theoretical concepts and ideas, which have been illustrated using real world examples and cases in retailing.

You have been introduced to some of the key areas of marketing communications – the message, the media and the communication tools. You have considered the basics of the communication model that underpins the development of marketing communication messages. You have also explored what it takes to develop a communication message, how to use communications to build a brand and the characteristics of the different media that might carry marketing communications. In addition, you have identified a range of communication tools which make up the marketing communication mix.

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

## 8. FUTURE SCOPE

### ➤ Functions of Retailers

Retailer provides the goods that customer need, in a desired form, at a required time and place.

- A retailer does not sell raw material. He sells finished goods or services in the form that customer wants.

- A retailers buys a wide range of products form different wholesalers and offers the best products under one roof. Thus, the retailer performs the functions of both buying and selling.

- A retailer keeps the products or services within easy reach of the customer by making them available at appropriate location.

### ➤ Scope

- Store management
- Category management
- Customer Relationship Management
- Vendor Management
- Inventory Management
- Supply Chain Management

