

PROJECT REPORT TEMPLATES

OVERVIEW

A retail management application built using Salesforce is a software solution that helps retailers manage their operations, including sales, inventory, customer relationships, and marketing. The application is built on the Salesforce platform, which provides a centralized location for data storage and management, as well as tools for customization, automation, and integration with other systems

PURPOSE

retail management application built using Salesforce can help retailers to improve their operations, increase efficiency, and provide better customer service.

PROBLEM DEFINE DESIGN THINKING

EMPATHY MAP



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.

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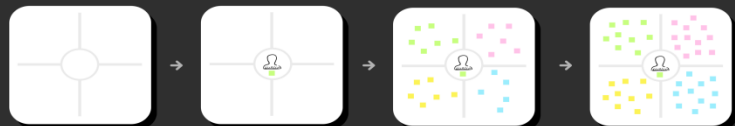
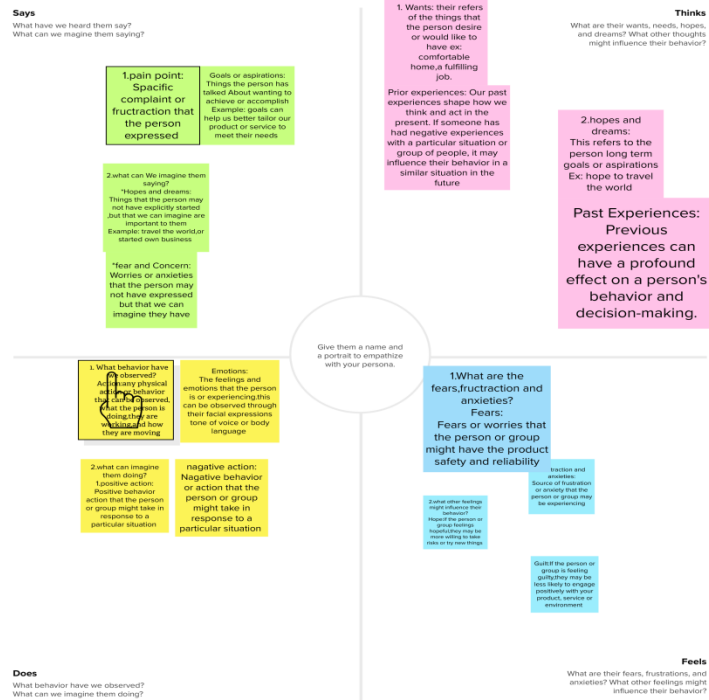


Need some inspiration?
See a finished version of this template to kickstart your work.
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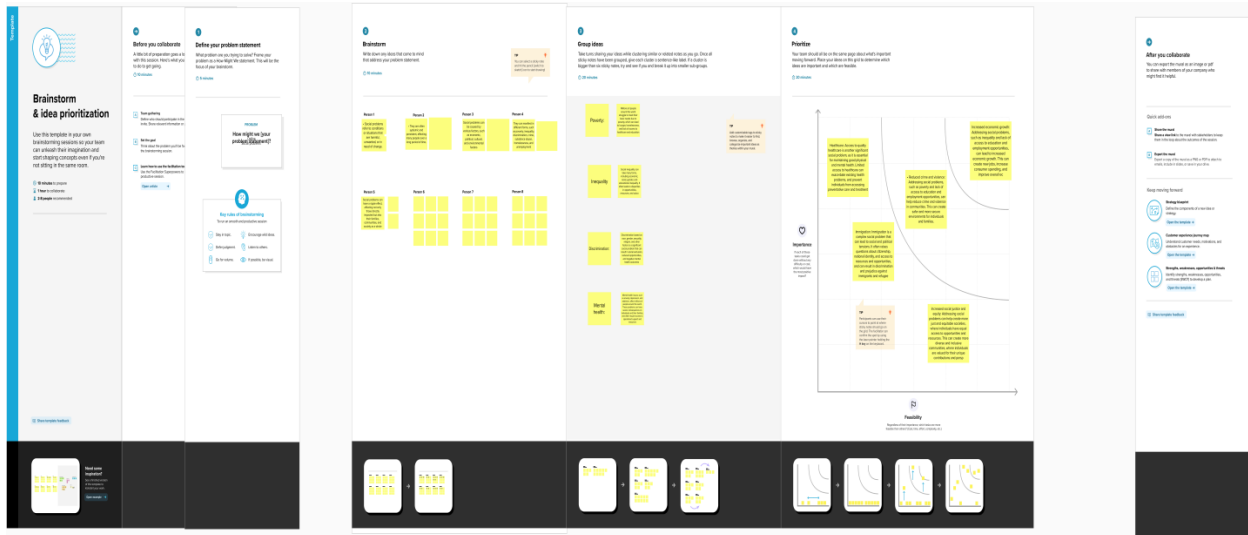
3

Build empathy

The information you add here should be representative of the observations and research you've done about your users.



IDEATION & BRAINSTORMING MAP



RESULT

Data model

Object name

filed in object

custom object.

Display/tracking

text.

1) Dispatched

2) Expected date of delivery

3) Tracking Id

4) Sales order

Application

app manager

new lightning app.

desktop & mobile

Custom Page layouts

1) Warehouse page layout

2) Sales order layout

3) Dispatch/Tracking layout

Creation of user

new user

user license of salesforce

.

standard platform profile

check the box

Validation Rule

Account object.

LEFT(Phone, 1) <> "+".

Phone number + (country code).

Report

Warehouses

warehouse name and stock available

stock availability.

.

Dashboard

stock availability

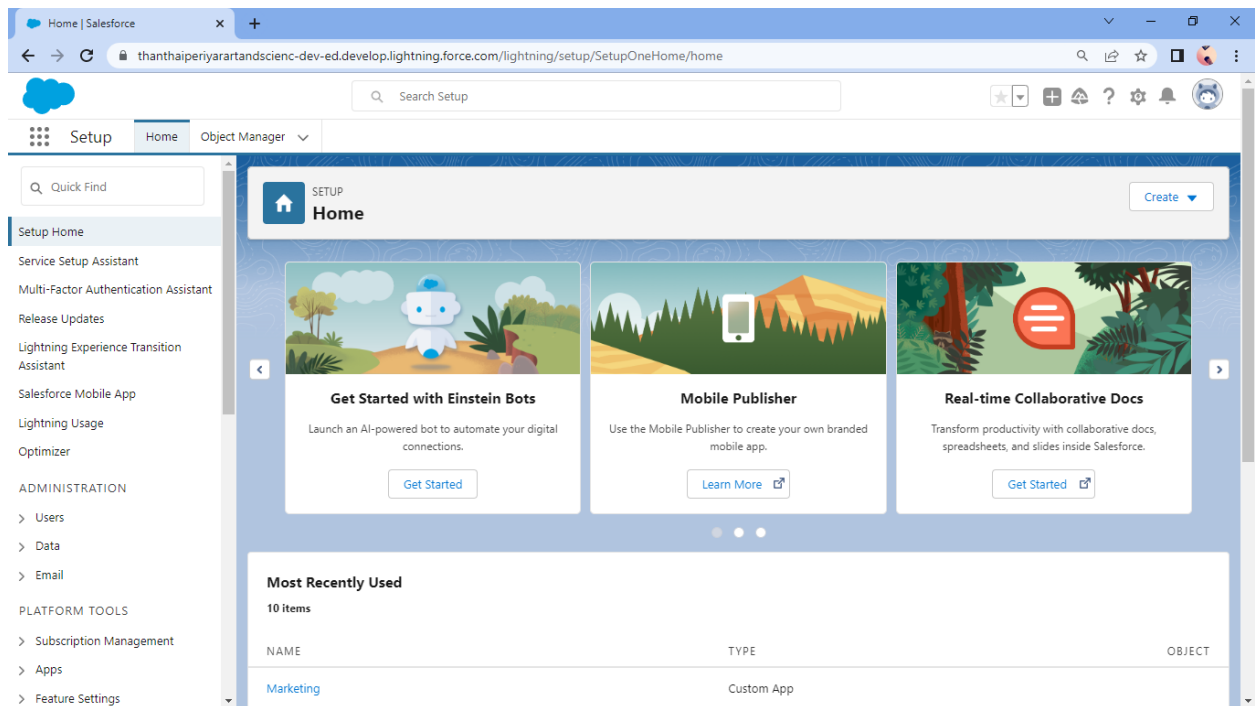
donut chart

default values.

ACTIVITY AND SCREEN SHOT

MILESTONE-1

CREATION OF SALES FORCE DEVELOPER ACCOUNT



DESCRIPTION

- TO CREATE AN ACCOUNT ON SALES FORCE ORG
- AFTER LOGIN TO SALES FORCE ACCOUNT ENTER USER NAME & PASSWORD

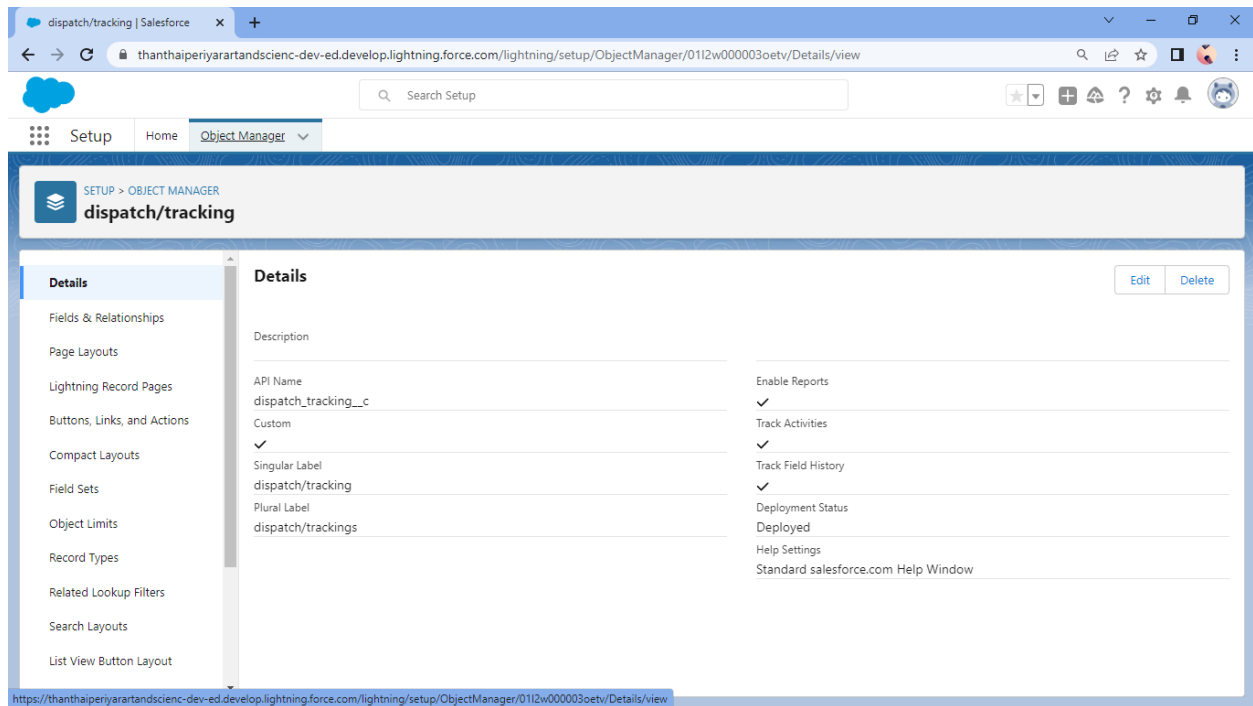
- AFTER LOGIN THIS HOME PAGE YOU WILL START THE PROJECT

MILE STONE -2

OBJECTS

ACTIVITY-1

CREATION OF OBJECT DISPATCH / TRACKING



ACTIVITY-2

FIELDS AVAILABLE ON DISPATCH/TRACKING

MILESTONE-3

RELATIONSHIP B/W OBJECT

ACTIVITY-1

CREATION OF RELATIONSHIP B/W OBJECT

MILESTONE-4

APPLICATION

ACTIVITY -1

CREATION OF APPLICATION

The screenshot shows the Salesforce Lightning Experience App Manager interface. The browser address bar indicates the URL: `thanthaperiyarantandscienc-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home`. The page title is "App Manager | Salesforce". The left sidebar contains a search bar with "app" and a navigation menu with categories like "Salesforce Mobile App", "Data", "Apps", "App Manager", "AppExchange Marketplace", "Connected Apps", "Lightning Bolt", "Mobile Apps", and "Salesforce". The main content area is titled "Lightning Experience App Manager" and includes buttons for "New Lightning App" and "New Connected App". Below this, there is a section for "Clone Apps(Beta)" with a toggle switch for "Enable App Cloning" (currently disabled). The main part of the interface displays a table of 23 items, sorted by App Name, filtered by All appmenuitems - TabSet Type. The table has columns for App Name, Developer Name, Description, Last Modified, App..., Vi..., and a dropdown menu.

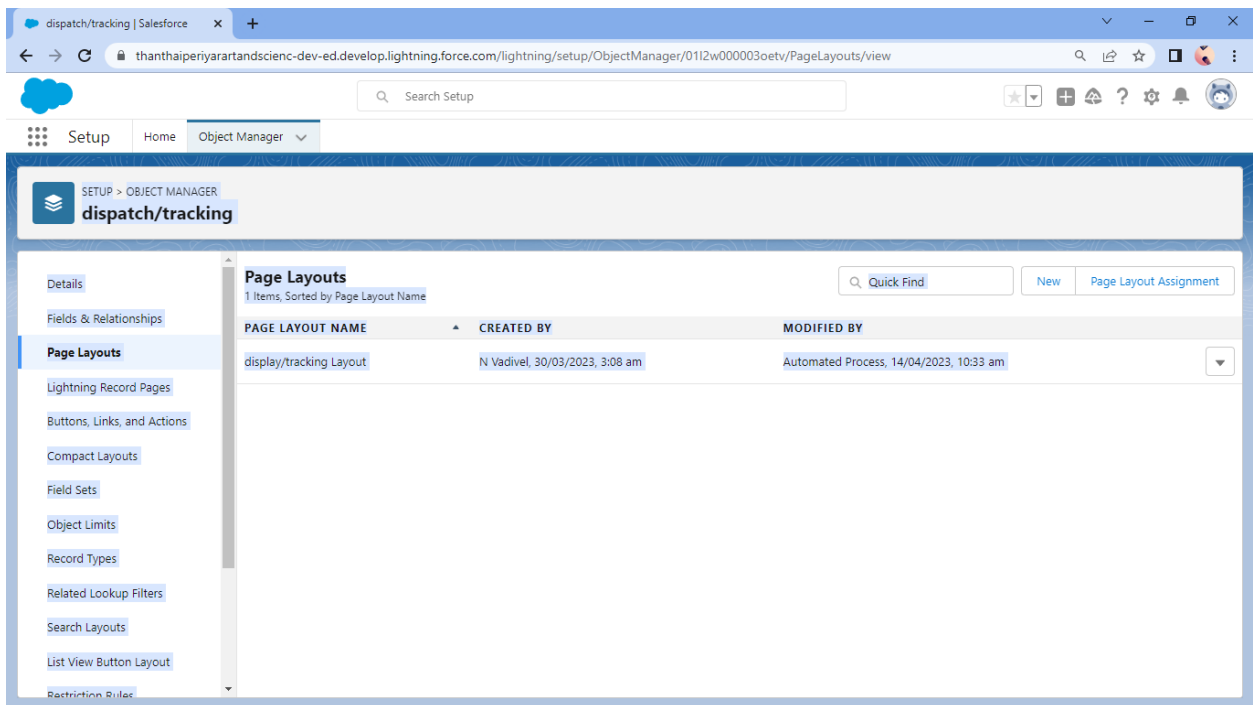
	App Name	Developer Name	Description	Last Modified	App...	Vi...
1	All Tabs	AllTabSet		29/03/2023, 3:42 pm	Classic	
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	29/03/2023, 3:42 pm	Classic	✓
3	App Launcher	AppLauncher	App Launcher tabs	29/03/2023, 3:42 pm	Classic	✓
4	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your in...	29/03/2023, 3:44 pm	Lightning	✓
5	Community	Community	Salesforce CRM Communities	29/03/2023, 3:42 pm	Classic	✓
6	Content	Content	Salesforce CRM Content	29/03/2023, 3:42 pm	Classic	✓

MILESTONE-5

LAYOUT

ACTIVITY -1

CREATION OF CUSTOM TAB



The screenshot shows the Salesforce Setup interface for the 'dispatch/tracking' object. The left sidebar contains a navigation menu with the following items: 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, List View Button Layout, and Restriction Rules. The main content area is titled 'Page Layouts' and shows a table with one item. The table has columns for 'PAGE LAYOUT NAME', 'CREATED BY', and 'MODIFIED BY'. The item listed is 'display/tracking Layout', created by 'N Vadivel' on 30/03/2023 at 3:08 am, and modified by 'Automated Process' on 14/04/2023 at 10:33 am. There are buttons for 'Quick Find', 'New', and 'Page Layout Assignment' at the top right of the table.

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
display/tracking Layout	N Vadivel, 30/03/2023, 3:08 am	Automated Process, 14/04/2023, 10:33 am

MILESTONE-6

USER

ACTIVITY-1

CREATION OF USER

The screenshot displays the Salesforce Setup interface for creating or editing a user. The left sidebar shows the navigation menu with categories like Feature Settings, Service, Einstein, Objects and Fields, User Interface, and Global Actions. The main content area is titled 'Users' and shows the details for a user named 'N Vadivel'. The user's profile is 'System Administrator' and they are currently 'Active'. The 'User Detail' section includes fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Delegated Approver, Manager, Role, User License, Profile, Active, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Push Registrations, Data.com User Type, and Accessibility Mode (Classic Only). The user's email is 'styleali1204@gmail.com' and their username is 'nm20rse26vadivel@gmail.com'. The user's title is 'User16800847244137351100'.

Users | Salesforce

thanthaperiyartandscienc-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F0052w00000GrinyAAB%3FnoRedirect%3D1%26i...

Search Setup

Setup Home Object Manager

Q layout

Feature Settings

- Chatter
 - Feed Item [Layouts](#)
- Groups
 - Group [Layouts](#)
- Service
 - Call Center
 - Softphone [Layouts](#)
- Einstein
 - Einstein Search
 - Search [Layouts](#)
- Objects and Fields
 - Object Manager
- User Interface
 - Global Actions
- Global Actions
 - Publisher [Layouts](#)

User Profile Help for this Page

User: N Vadivel

[Permission Set Assignments \(1\)](#) | [Permission Set Assignments: Activation Required \(0\)](#) | [Permission Set Group Assignments \(0\)](#) | [Permission Set License Assignments \(0\)](#) | [Personal Groups \(0\)](#) | [Public Group Membership \(0\)](#) | [Queue Membership \(0\)](#) | [Team \(0\)](#) | [Managers in the Role Hierarchy \(0\)](#) | [OAuth Connected Apps \(1\)](#) | [Third-Party Account Links \(0\)](#) | [Installed Mobile Apps \(0\)](#) | [Authentication Settings for External Systems \(0\)](#) | [Login History \(104\)](#) | [User Provisioning Accounts \(0\)](#)

User Detail

Edit Sharing Change Password

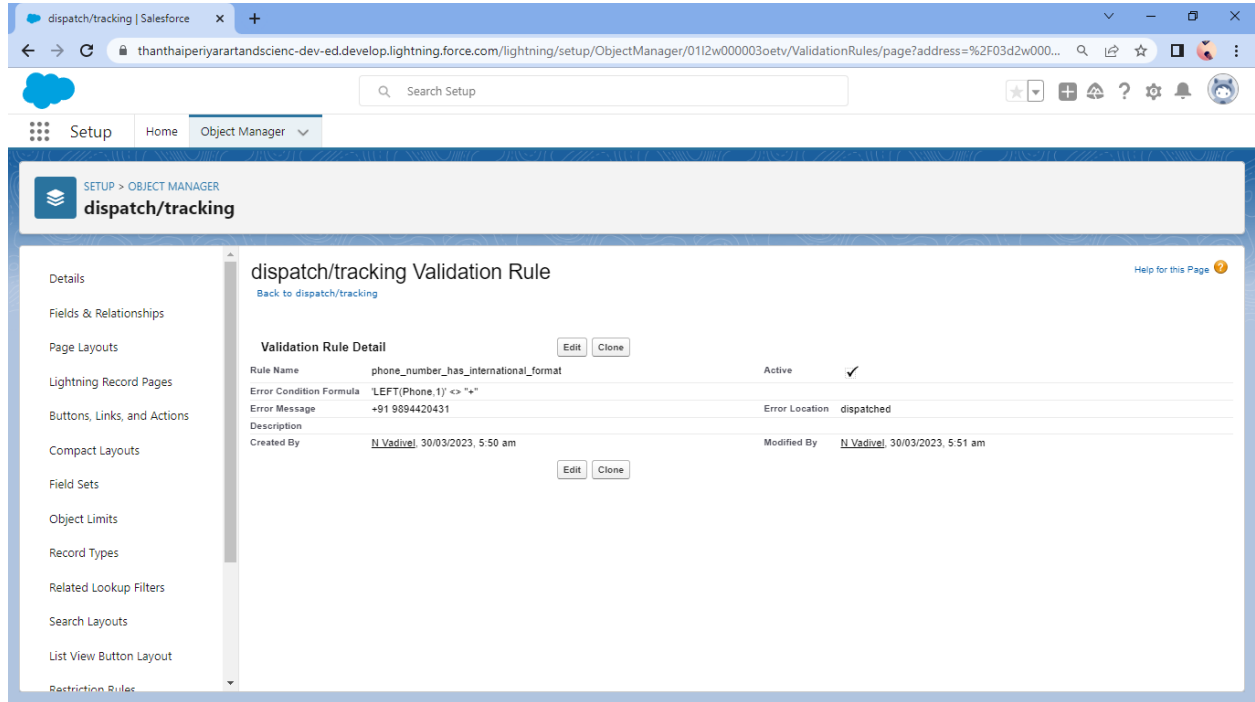
Name	N Vadivel	Role	
Alias	Vel N	User License	Salesforce
Email	styleali1204@gmail.com	Profile	System Administrator
Username	nm20rse26vadivel@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User16800847244137351100	Marketing User	<input checked="" type="checkbox"/>
Title		Offline User	<input checked="" type="checkbox"/>
Company	Thanthai periyar art and science college	Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input checked="" type="checkbox"/>
Address	IN	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	i
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> i

MILESTONE-7

VALIDATION RULE

ACTIVITY-1

CREATION VALIDATION RULE



ACTIVITY-2

CREATION OF CROOSE OBJECT

MILESTONE-7

ACTIVITY-1

CREATION OF REPORT

Report: Accounts
retail management

Total Records
12

<input type="checkbox"/> Account Name ↑	Last Activity	Account Owner	Billing State/Province	Type	Rating	Last Modified Date	Phone	Fax
<input type="checkbox"/> Burlington Textiles Corp of America (1)	-	N Vadivel	NC	Customer - Direct	Warm	29/03/2023	📞 (336) 222-7000	📞 (336) 222-8000
Subtotal								
<input type="checkbox"/> Dickenson plc (1)	-	N Vadivel	KS	Customer - Channel	-	29/03/2023	📞 (785) 241-6200	📞 (785) 241-6201
Subtotal								
<input type="checkbox"/> Edge Communications (1)	-	N Vadivel	TX	Customer - Direct	Hot	29/03/2023	📞 (512) 757-6000	📞 (512) 757-9000
Subtotal								
<input type="checkbox"/> Express Logistics and Transport (1)	-	N Vadivel	OR	Customer - Channel	Cold	29/03/2023	📞 (503) 421-7800	📞 (503) 421-7801
Subtotal								
<input type="checkbox"/> GenePoint (1)	-	N Vadivel	CA	Customer - Channel	Cold	29/03/2023	📞 (650) 867-3450	📞 (650) 867-9895
Subtotal								
<input type="checkbox"/> Grand Hotels & Resorts Ltd (1)	-	N Vadivel	IL	Customer - Direct	Warm	29/03/2023	📞 (312) 596-1000	📞 (312) 596-1500
Subtotal								
<input type="checkbox"/> Pyramid Construction Inc. (1)	-	N Vadivel	-	Customer - Channel	-	29/03/2023	📞 (014) 427-4427	📞 (014) 427-4428

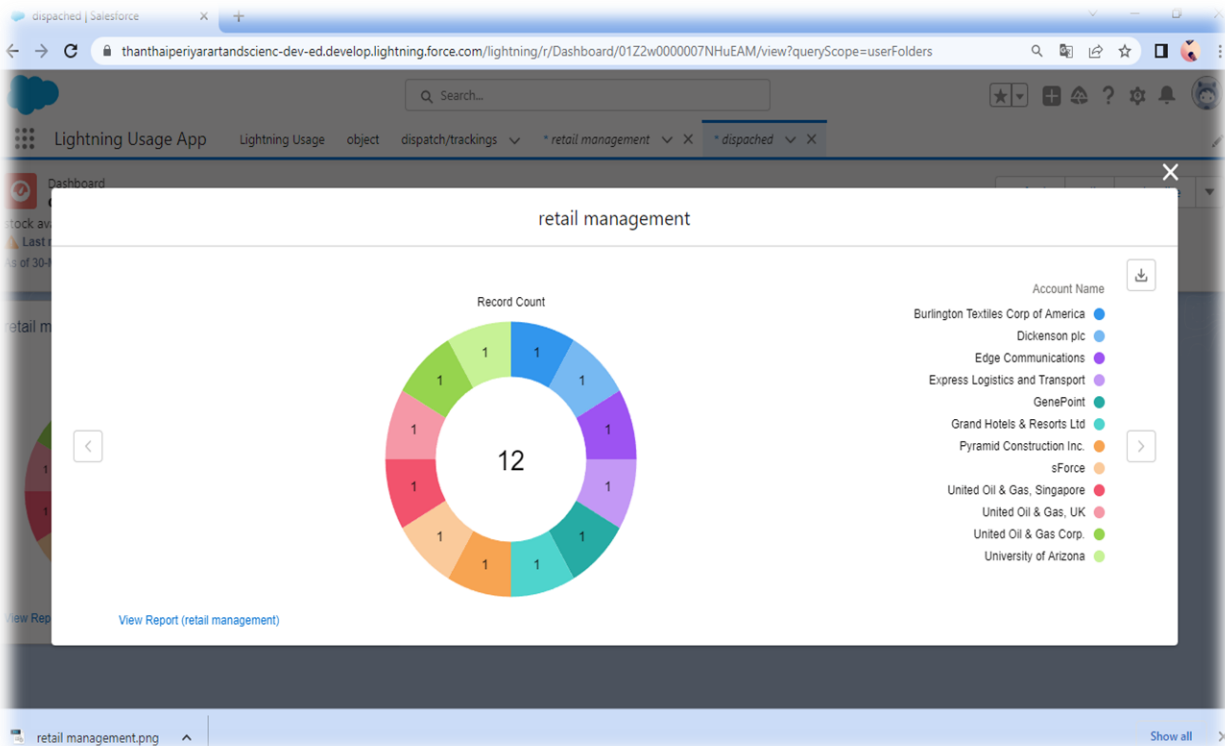
Row Counts ☒ Detail Rows ☒ Subtotals ☒ Grand Total ☒

MILESTONE-8

DASHBOARDS

ACTIVITY-1

CREATION OF DASHBOARDS



TRAILHEAD PROFILE PUBLIC URL:

Team leader : <https://trailblazer.me/id/hsrirangan>

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

Team member-2: <https://trailblazer.me/id/gkrishnan2325>

Team member-3: <https://trailblazer.me/id/kavim47>

Team member-4: <https://trailblazer.me/id/pavi14>

Salesforce for retail management applications can help retailers to improve

their sales performance, enhance customer engagement, streamline their operations, and make data-driven decisions.

Disadvantages:

One potential disadvantage of using Salesforce for retail management applications is that it can be a complex and sophisticated platform, which may require significant training and expertise to use effectively. This can make it challenging for smaller retailers with limited resources to implement and maintain Salesforce solutions

Application:

retail management application using Salesforce can help retailers to improve their sales performance, enhance customer engagement, streamline their operations, and make data-driven decisions.

Conclusion:

a retail management application using Salesforce can provide several benefits to retailers, including efficient sales management, enhanced customer engagement,

streamlined inventory management, improved reporting and analytics, and integration with other systems. However, it may also have some potential disadvantages, such as high costs and complexity. Despite these challenges, retailers can leverage the power of Salesforce to optimize their operations, drive sales, and improve customer satisfaction.

Future scope:

the future scope of a retail management application using Salesforce is bright, as the platform continues to innovate and provide retailers with new tools and capabilities to optimize their operations, drive sales, and improve customer satisfaction.