

# PROJECT REPORT TEMPLATE

## 1 INTRODUCTION

### 1.1 Overview

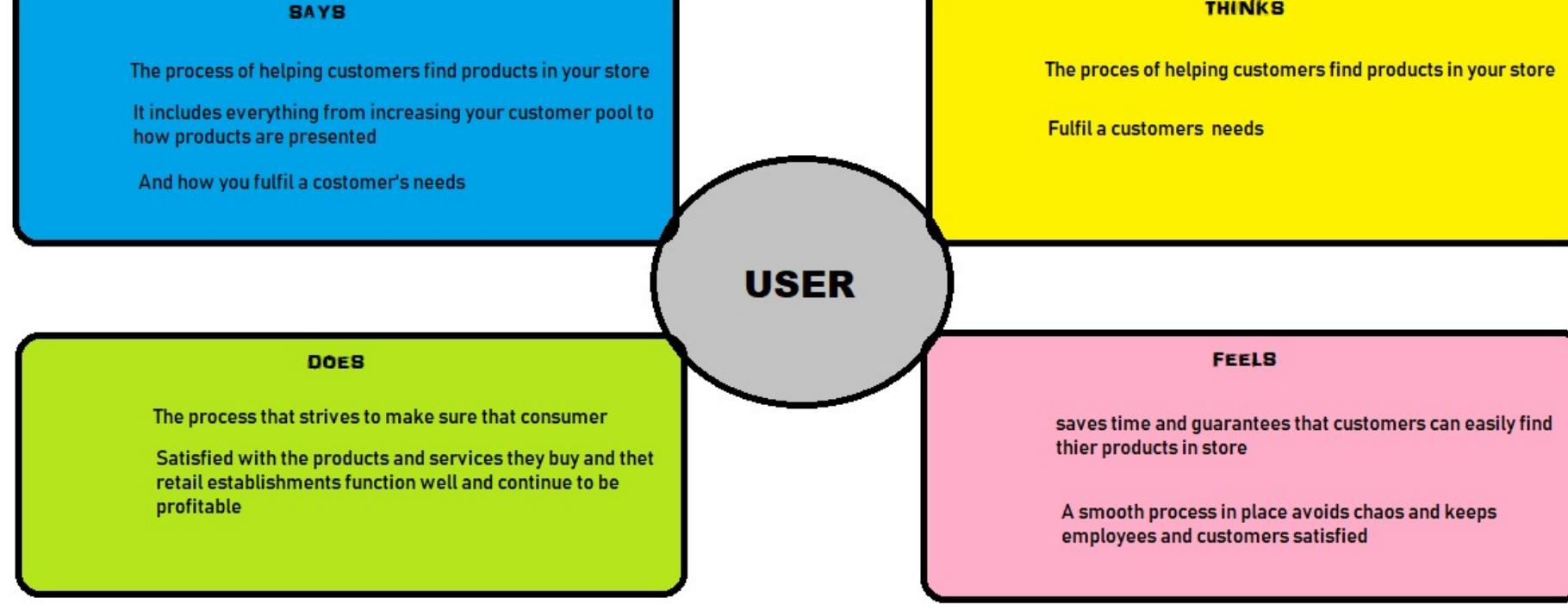
Retailing encompasses the business activities involved in selling goods and services to consumers for their personal, family, or household etc. A CRM product owner has requested to create two applications, one is a sales app for sales reps to use this application and store customers data, and the second application is a service app for service reps/agents to provide support to customers in dealing cases. To generate business on top of the customers.

### 1.2 Purpose

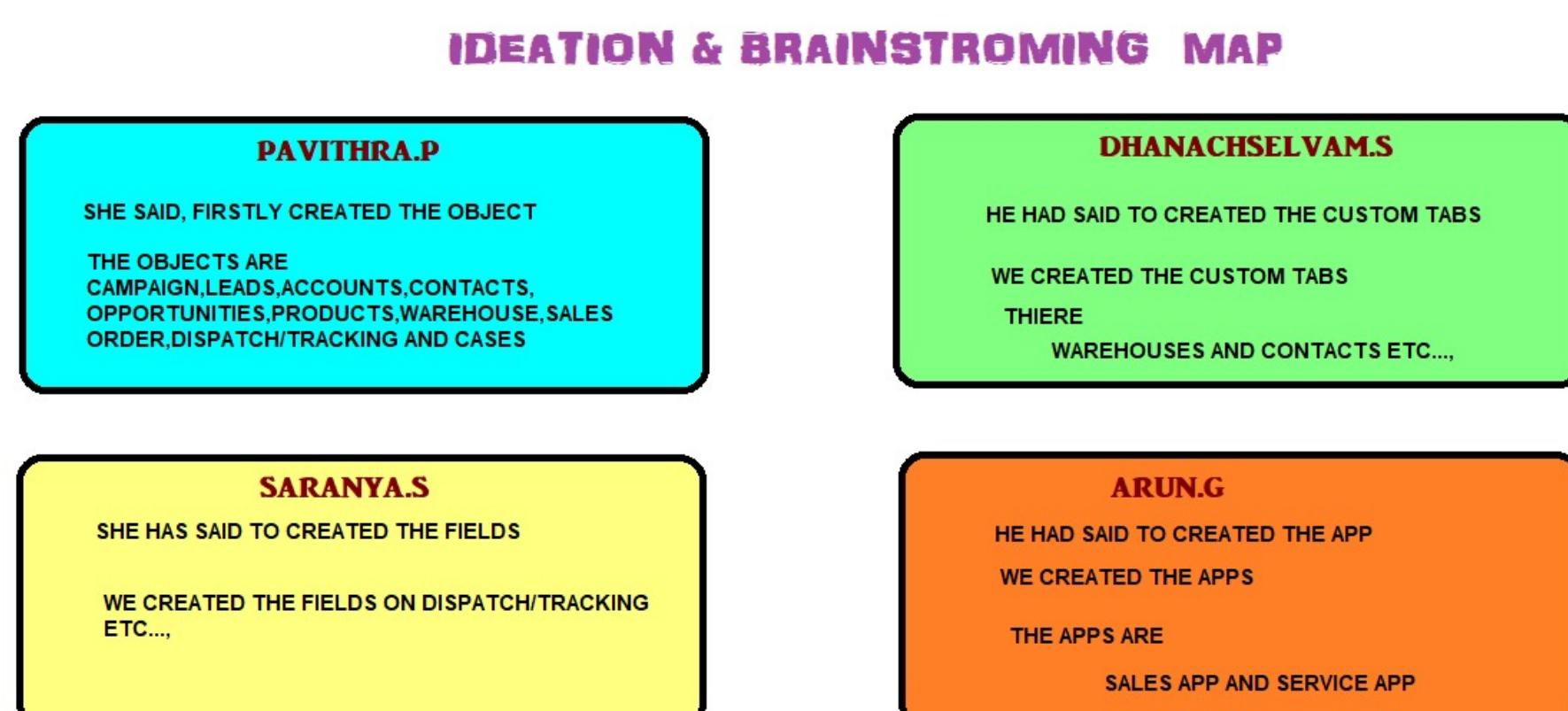
Retail management optimizes internal processes such as inventory management, offline and online storefronts, warehouse operations, payment and accounting, and human resources. Retail management improves overall company cohesion. Retail store management improves customer experience and boosts customer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

## 2 Problem Definition & Design Thinking

### 2.1 Empathy Map



## 2.2 Ideation & Brainstorming Map



## 3 RESULT

### 3.1 Data Model:

#### Objects:

##### 1. Campaign

Field Label	Data type
Active	- Checkbox
Campaign Name	- Text(80)
Campaign Owner	- Lookup(user)
parent Campaign	- Lookup(Campaign)

##### 2. Leads

Field Label	Data type
Lead name	- Text(80)
Owner	- Lookup(User, group)

##### 3.Accounts

Field Label	Data type
Account Name	- Text(80)
Owner	- Lookup (User, Group)

## 4.Contacts

Field Label	-	Data type
Contact Name	-	Text(80)
Owner	-	Lookup (User,Group)

## 5.Opportunities

Field Label	-	Data type
Opportunities Name	-	Text(80)
Owner	-	Lookup(User,Group)

## 6.Products

Field Label	-	Data type
Product Name	-	Text(80)
Owner	-	Lookup(User, Group)

## 7.Warehouse

Field Label	-	Data type
Warehouse Name	-	Text(80)
Owner	-	Lookup(User,Group)

## 8.Sales Order

Field Label	-	Data type
Sales Order Name	-	Text(80)
Owner	-	Lookup(User, Group)

## 9.Dispatch/Tracking

Field Label	-	Data type
Dispatch/Tracking Name	-	Text(80)
Dispatch/Tracking	-	Master-Detail(sales order)

# 10.Cases

## Field Label

Cases Name  
Owner

## Data type

Text(80)  
Lookup(User,Group)

## 3.2 Activity & Screenshot

The screenshot shows the Salesforce Setup Home interface. On the left, there's a sidebar with links like 'Setup Home', 'Service Setup Assistant', 'Multi-Factor Authentication Assistant', etc. The main area features three cards: 'Get Started with Einstein Bots', 'Mobile Publisher', and 'Real-time Collaborative Docs'. Below these cards is a section titled 'Most Recently Used'.

The screenshot shows the 'New Custom Object' page. It has sections for 'Custom Object Definition Edit', 'Custom Object Information' (Label: 'dispatch/tracking', Plural Label: 'dispatch/trackings'), and 'Object Name' ('Object Name: dispatch\_tracking'). There are also fields for 'Description', 'Context-Sensitive Help Setting' (set to 'Open the standard Salesforce.com Help & Training window'), and 'Content Name' ('None'). A note at the bottom says 'Enter Record Name Label and Format'.

The screenshot shows the 'Fields & Relationships' page for the 'dispatch/tracking' object. It lists four fields: 'Created By' (Lookup(User)), 'dispatch/tracking' (Master-Detail(sales order)), 'dispatch/tracking Name' (Text(80)), and 'Last Modified By' (Lookup(User)). The page includes a sidebar with links like 'Page Layouts', 'Lightning Record Pages', etc.

dispatch/tracking | Salesforce dispatch/tracking: New Custom F

governmentartsandscienc-1f9-dev-ed.develop.my.salesforce.com/p/setup/field/NewCustomFieldStageManager

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New Custom Field

Step 2. Enter the details Step 2 of 4

Field Label: dispatched

Default Value: Unchecked

Field Name: dispatched

Description:

Help Text:

Auto add to custom report type  Add this field to existing custom report types that contain this entity

Previous Next Cancel

App Manager | Salesforce

governmentartsandscienc-1f9-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

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New Lightning App

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

\* App Name: Name your app...

\* Developer Name: Enter a developer name...

Description:

App Branding

Image:  Upload

Primary Color Hex: #0070D2

Next

Users | Salesforce

governmentartsandscienc-1f9-dev-ed.develop.my.salesforce.com/005?isUserEntityOverride=1&appLayout=setup&noS1Redirect=true

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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](#)

New User Reset Password(s) Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
<a href="#">Edit</a>	balaji_bala	bbala	arun@ganesan3.com		<input checked="" type="checkbox"/>	Standard User
<a href="#">Edit</a>	Chatter Expert	Chatter	chatty.00d2w00000rkcmxe1.em0az6v5yel@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<a href="#">Edit</a>	GANESAN_ARUN	AGANE	arun@ganesan.com		<input checked="" type="checkbox"/>	System Administrator
<a href="#">Edit</a>	ganesan_arun	agane	arunganesan0310@gmail.com		<input checked="" type="checkbox"/>	Identity User
<a href="#">Edit</a>	User_Integration	integ	integration@00d2w00000rkcmxe1.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User

Users | Salesforce New User ~ Salesforce - Develop

governmentartsandscienc-1f9-dev-ed.develop.my.salesforce.com/005/e?retURL=%2F005%3FisUserEntityOverride%3D1%26appLayout%3Dsetup%26noS1Redirect%3Dtrue

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salesforce 23

Search... Search

Switch to Lightning Experience ARUN GANESAN Setup Help Content

Home Chatter Libraries Content Subscriptions warehouses dispatch/trackings sales orders accountss campaigns contactss leadss casess opportunities productss +

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Tell Me More Check Readiness

Quick Find / Search... Help for this Page

Expand All Collapse All

Lightning Experience Transition Assistant  
Move to the new, more productive Salesforce.  
Get Started

Salesforce Mobile Quick Start

Home

User Edit Save Save & New Cancel

General Information = Required Information

First Name		Role	<None Specified>
Last Name	balaji	User License	Identity
Alias	bala	Profile	Identity User
Email	arunganesan0310@gmail.co	Active	<input checked="" type="checkbox"/>
Username	arunganesan0310@gmail.co	Marketing User	<input type="checkbox"/>
Nickname	User1681918123669275608	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>

New Dashboard | Salesforce

governmentartsandscienc-1f9-dev-ed.develop.lightning.force.com/one/one.app#eyJhb21wb25lbnREZWYiOjkZXNrdG9wRGFzaGJvYXJkcspkYXNoYm9hcmQiLCJhdH...

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

New Dashboard

\* Name

Description

Folder Private Dashboards Select Folder

Cancel Create

Dashboards | Salesforce

governmentartsandscienc-1f9-dev-ed.develop.lightning.force.com/lightning/o/Dashboard/home?queryScope=mr

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

Recent

1 item

DASHBOARDS

Dashboard Name	Description	Folder	Created By	Created On	Subscribed
products with stock availability	Private Dashboards	ARUN GANESAN	18/4/2023, 8:51 pm		

Recent

Created by Me

Private Dashboards

All Dashboards

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

To Do List

## 4 Trailhead Profile Public URL

Team Lead - <https://trailblazer.me/id/arun0310>  
Team Member1- <https://trailblazer.me/id/pperumal24>  
Team Member 2 -<https://trailblazer.me/id/saranyaj55>  
Team Member3-<https://trailblazer.me/id/ssdhanachselvam>

## Project Report Template

### 5 ADVANTAGES

#### 1 . Less Capital Requirement

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

#### 2. 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.

#### 3. 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.

#### 4. Better Customer Relation

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

# **DISADVANTAGE**

## **1. Selling Skill Required**

It requires good selling skill to attract customers. Retailers should possess the art of good communication and convincing power to influence consumers.

## **2. 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.

## **3. No Economies Of Buying**

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

## **4. It Requires Proper Location**

It is difficult to find out proper location to start retail store. It requires highly dense area with fewer competitors.

## **6 APPLICATIONS**

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

## 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.

## 8 FUTURE SCOPE

The career opportunities are in the areas of Store Operations, Retail Marketing, Visual Merchandising, Buying & Merchandising, Brand Management, Store Location & Design, MIS in Retail, Human Resource Management, E-Tailing and Digital Retailing.