

PROJECT REPORT ON

RETAIL MANAGEMENT AND SALESFORCE

1. INTRODUCTION

1.1 Overview

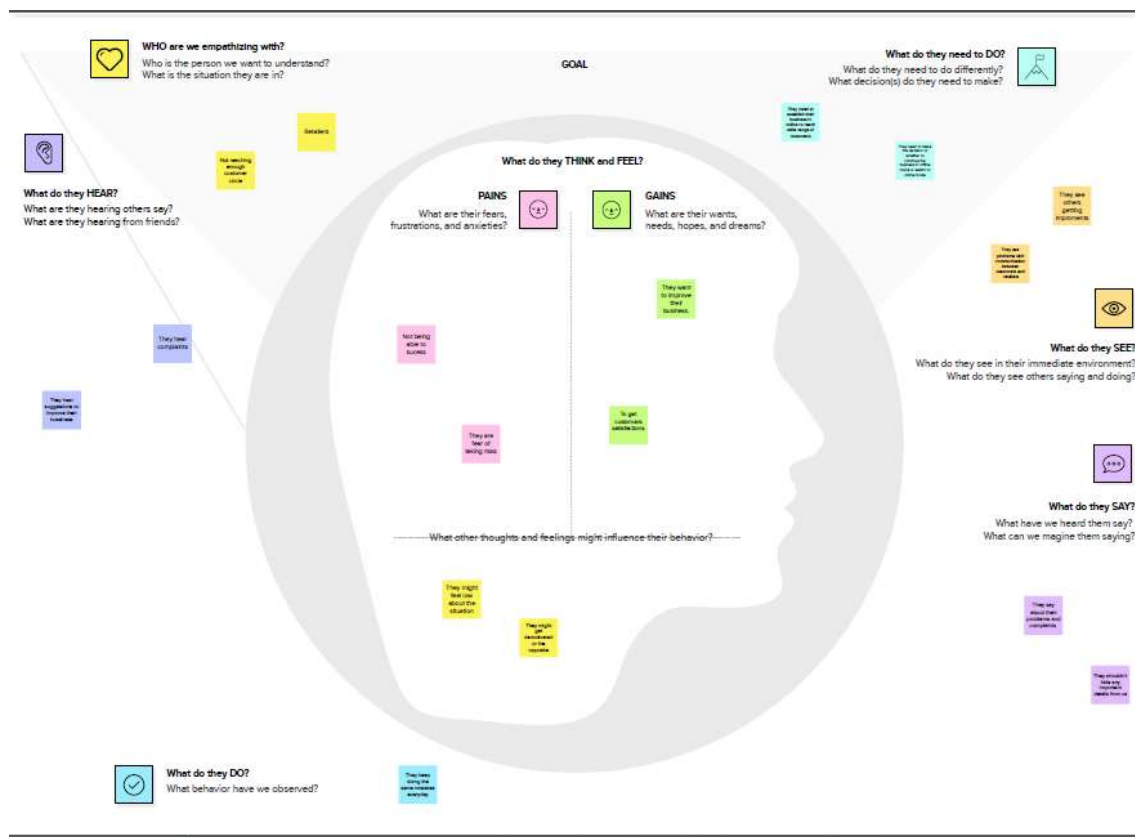
Retail management involves various activities such as inventory management, sales application using Salesforce can automate and streamline these activities, making them more efficient and effective

1.2 Purpose

The purpose of this project is to create a retail management application using Salesforce that can help retail businesses manage their operations more efficiently. The application will automate various tasks, such as tracking inventory, sales, and customer data, to help save time and reduce errors.

2. PROBLEM DEFINITION & DESIGN THINKING

2.1 Empathy Map



2.2 Ideation & Brainstorming Map

2.2 Ideation & Brainstorming Map



3. RESULT

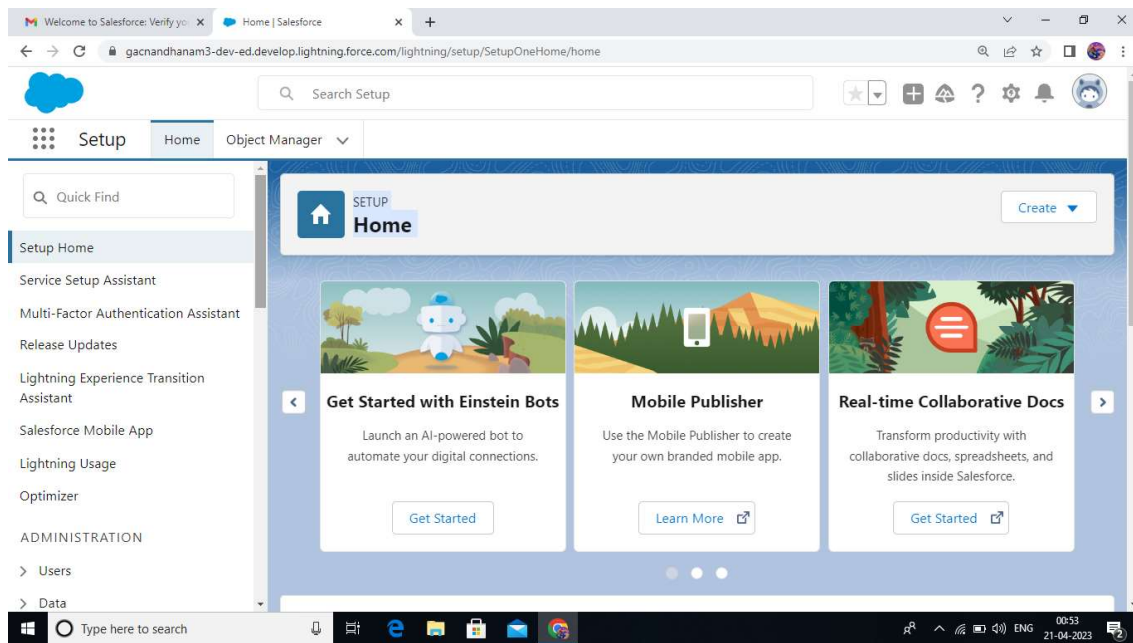
3.1 Data Model:

Object name	Fields in the Object	
Object 1		
	Field label	Data type
	campaign	We do promotions by using this object
	Leads	We capture leads here
	accounts	We capture leads here

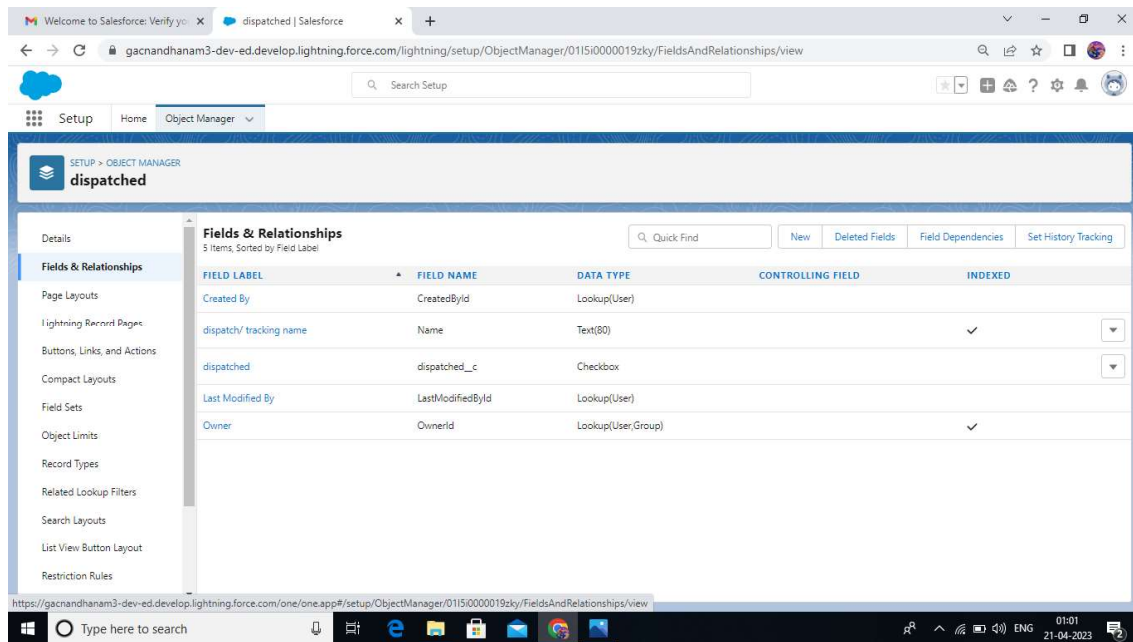
	contacts	Employee data of coustemer
	opportunities	Smb sales orders data
	products	Here was store product details
	warehouse	We capture stocks data
	Sales order	This is an actual order which has invoice details
	Dispatch/tracking	Orders dispatch related info will be stored here
Object 2		
	Field label	Data type
	cases	Historical problems of customers will be stored here
	accounts	We capture coustomers data

3.2 Activity and Screenshot

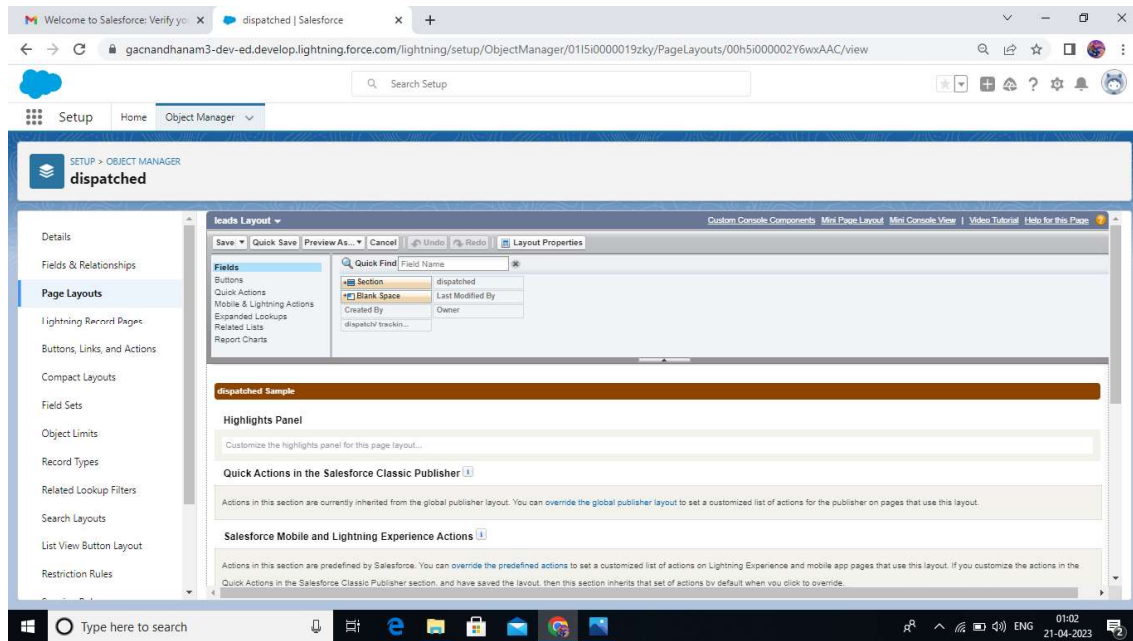
Milestone 1



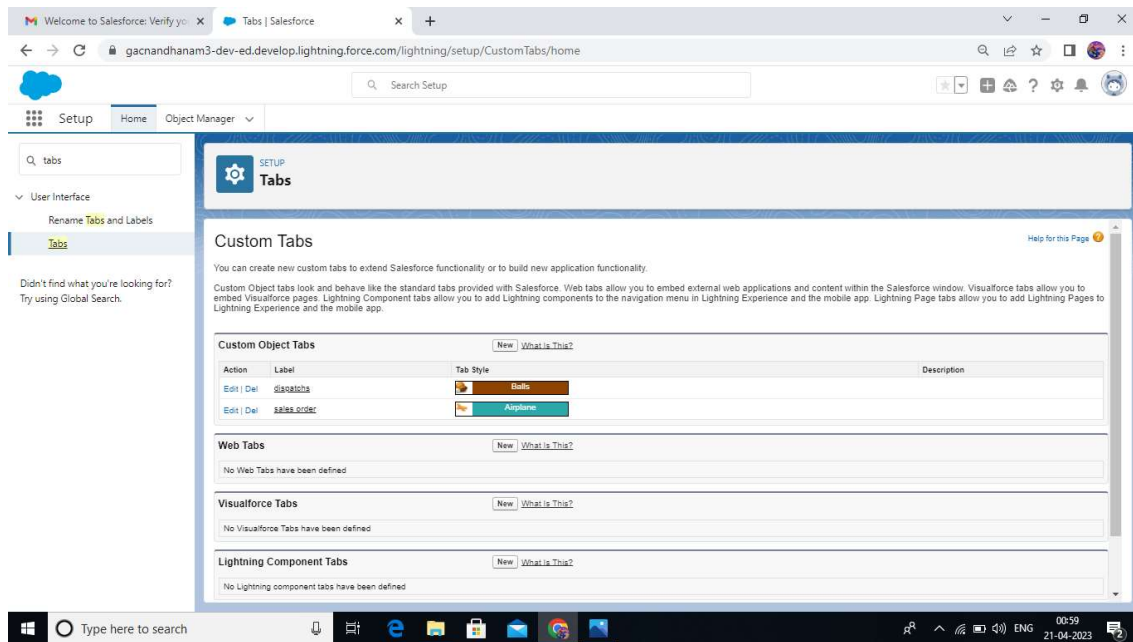
Milestone 2



Milestone 3



Milestone 4



Milestone 5

Welcome to Salesforce: Verify yo... x Users | Salesforce x +

gacnandhanam3-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home

Search Setup

Setup Home Object Manager

user

Users

Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users

Feature Settings
Data.com
Prospector Users
User Interface
Action Link Templates
Actions & Recommendations
App Menu
Custom Labels
Density Settings

SETUP
Users

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	Chatter Euser	Chatter	ghatty.00d50000000000000000000000000000@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	M. Santhosh	SM	santhosh@pocmrodev.com		✓	System Administrator
<input type="checkbox"/> Edit	M. santhosh	sm	santhosh@pocmrodev.com		✓	Custom Roles Profile
<input type="checkbox"/> Edit	User Integration	intso	integration@00d50000000000000000000000000000@feast.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sso	insightsecurity@00d50000000000000000000000000000@feast.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

00:57
21-04-2023

Milestone 6

Welcome to Salesforce: Verify yo... x App Manager | Salesforce x +

gacnandhanam3-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

Search Setup

Setup Home Object Manager

app

Salesforce Mobile App

Data
Mass Transfer Approval Requests
Apps
App Manager
AppExchange Marketplace
Connected Apps
Connected Apps OAuth Usage
Manage Connected Apps
Lightning Bolt
Flow Category
Lightning Bolt Solutions
Mobile Apps
Salesforce
Salesforce Branding
Salesforce Navigation
Salesforce Notifications

SETUP
Lightning Experience App Manager

New Lightning App New Connected App

Clone Apps(Beta)

Quickly create new Lightning apps by cloning existing apps. To use the beta feature, indicate that you've read all legal requirements and agree to participate by toggling Enable App Cloning. See additional details and terms in the [Winter '23 release notes](#).

Enable App Cloning Disabled

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

	App Name	Developer Name	Description	Last Modified D...	App	Visi...
1	All Tabs	AllTabSet		13/04/2023, 10:27 am	Classic	
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	13/04/2023, 10:27 am	Classic	✓
3	App Launcher	AppLauncher	App Launcher tabs	13/04/2023, 10:27 am	Classic	✓
4	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	13/04/2023, 10:30 am	Lightning	✓
5	Community	Community	Salesforce CRM Communities	13/04/2023, 10:27 am	Classic	✓
6	Content	Content	Salesforce CRM Content	13/04/2023, 10:27 am	Classic	✓
7	Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	13/04/2023, 10:27 am	Lightning	✓
8	Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	13/04/2023, 10:27 am	Lightning	✓

Type here to search

00:56
21-04-2023

Milestone 7

gacnandhanam3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Account/ValidationRules/03d5i00000115VIAA/view

Setup Home 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

Account Validation Rule

[Back to Account Validation Rules](#)

Validation Rule Detail

Rule Name	phone_number_has_international_format	Active	✓
Error Condition Formula	left(Phone,1)<>"+"		
Error Message	phone number must begin with+(countrycode)	Error Location	Phone
Description			
Created By	Santhosh M. 20/04/2023, 2:50 pm	Modified By	Santhosh M. 20/04/2023, 2:50 pm

Type here to search

Milestone 8

gacnandhanam3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Account/FieldsAndRelationships/Phone/view

Setup Home 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

Phone

[Back to Account Fields](#)

Field Information

Field Label	Phone	Field Name	Phone
Data Type	Phone		
Help Text			
Description			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Validation Rules

Action	Rule Name	Error Message	Active	Modified By
Edit Del	phone_number_has_international_format	phone number must begin with+(countrycode)	✓	Santhosh M. 20/04/2023, 2:50 pm

Type here to search

Milestone 9

Report: Accounts
RETAIL MANGEMENT AND SALESFORCE

Total Records: 12

Website →	http://dickenson-consulting.com	http://edgecomm.com	http://www.uos.com	http://www.burlington.com						
Account Owner Alias	Account Site	Customer Priority →	Low	Subtotal	Medium	Subtotal	High	Subtotal	-	Subtotal
SM	-	Record Count	1	1	1	1	3	3	1	1

Details (12 Rows)

Last Activity	Account Owner	Account Name	Billing State/Province	Type	Rating	Last Modified Date
-	Santhosh M	Dickenson plc	KS	Customer - Channel	-	13/04/2023
-	Santhosh M	Edge Communications	TX	Customer - Direct	Hot	13/04/2023

Row Counts: ☒ Detail Rows: ☒ Subtotals: ☒ Grand Total: ☒ Stacked Summaries: ☒

Milestone 10

RETAIL MANGEMENT AND SALESFO...

Record Count: 12

Account Owner Alias: SM

View Report (RETAIL MANGEMENT AND SALESFORCE)

4. TRAILHEAD PROFILE PUBLIC URL

Team Lead – <https://trailblazer.me/id/ssweetosh>

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

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

Team member 3 - <https://trailblazer.me/id/sure8838>

5.

6. ADVANTAGES AND DISADVANTAGES

The retail management process will be more streamlined, saving retailers time and effort.

The application will help retailers reduce errors and ensure that all operations are properly managed.

Automated reminders and notifications will ensure that retailers are aware of low stock

levels, upcoming sales, and other important events.

The application will allow retailers to better track and manage their operations, increasing their operational efficiency.

Implementing the system may require significant time and resources.

There may be a learning curve for retail staff and other users.

The system may require ongoing maintenance and updates.

7. APPLICATIONS

The application can be used by retail businesses of all sizes to help manage their operations.

The system can be customized to fit the specific needs of the business, allowing for greater flexibility.

The application can also be used by individual store owners to manage their own operations

8. CONCLUSION

A retail management application using Salesforce can greatly improve the efficiency and effectiveness of retail businesses. With automated tasks and reminders, retailers can focus on the most important aspects of their job, such as maintaining customer satisfaction and managing their operations effectively.

9. FUTURE SCOPE

The application can be expanded to include additional features, such as integration

with accounting software, to create a complete retail management system.

Additionally, the system can be integrated with other retail software to create a comprehensive retail management system. This application can also be used to manage other types of businesses such as restaurants or service-based businesses