

Project Report Template

1 INTRODUCTION

1.1 Overview

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationship with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

1.2 Purpose

Salesforce helps businesses keep track of customer interactions and sales data. It can manage leads, contacts, opportunities, and cases. Salesforce also offers several features to help businesses automate their sales and marketing processes, such as email marketing, lead capture, and lead scoring.

2 Problem Definition & Design Thinking

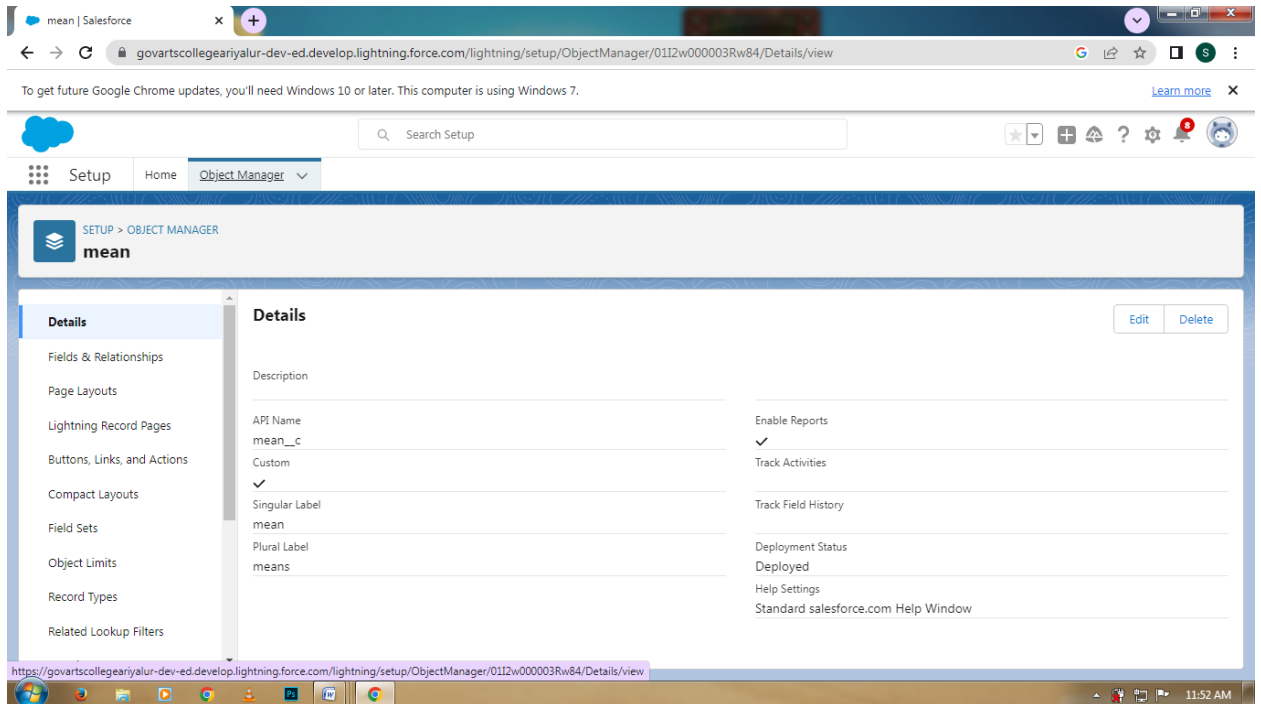
2.1 Empathy Map

3 Result

3.1 Data Model:

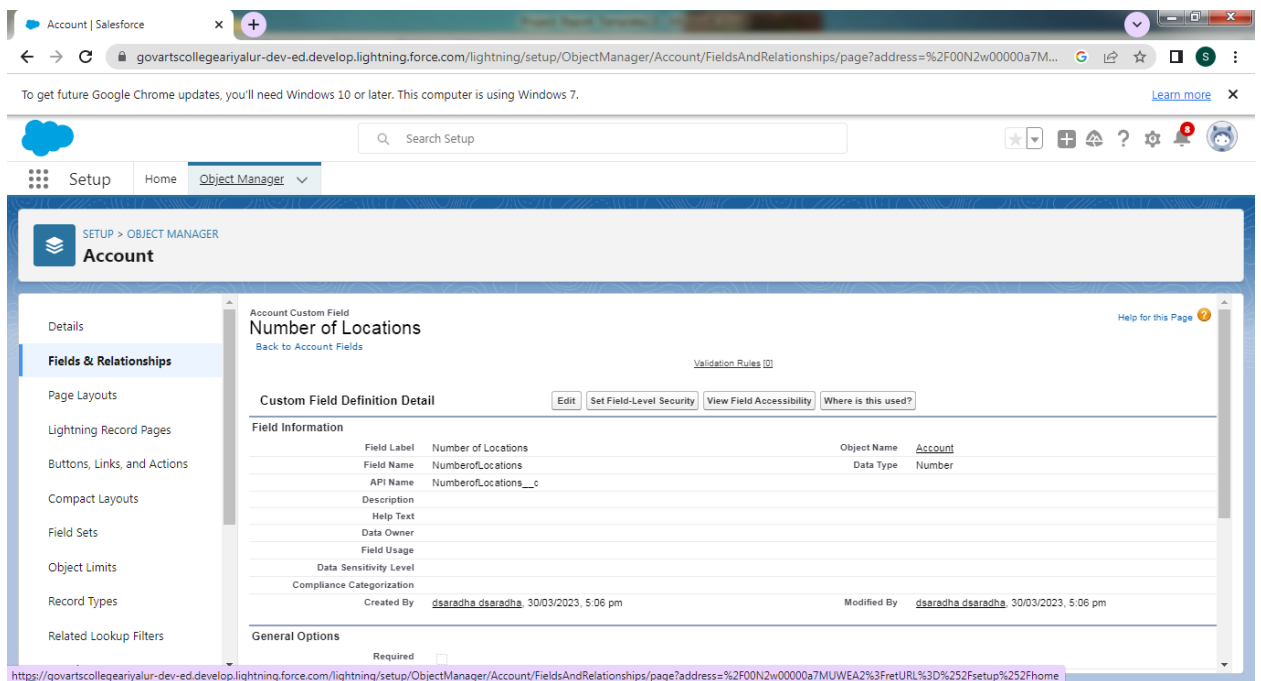
Object Name	Fields in the object	
Field & Relationship		
	Field label	Data type
	Dispatched	Checkbox
Field & Relationship		
	Field label	Data type
	Tracking Id	Auto Number

3.2 Activity & Screenshot



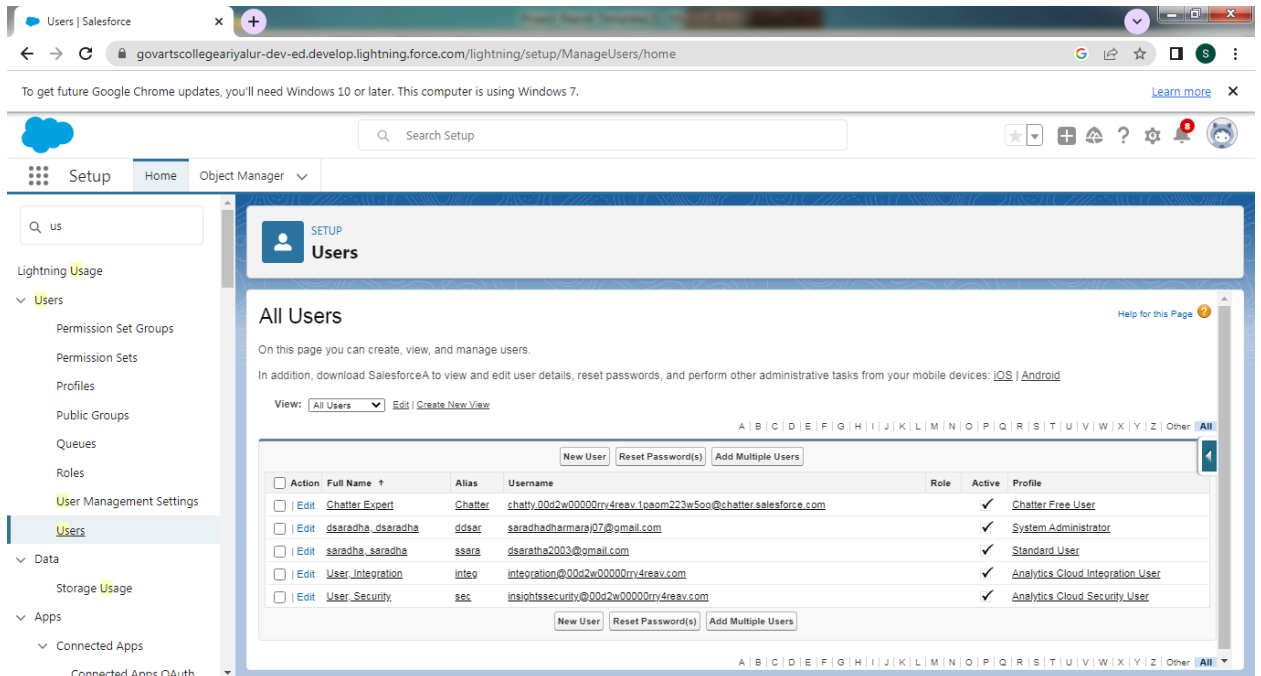
Description:

The following activity was very interesting and very easy.



Description:

The following activity account create in very easy.



The screenshot shows the Salesforce Setup page for managing users. The left sidebar contains a navigation menu with options like 'Users', 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', 'Data', 'Storage Usage', 'Apps', and 'Connected Apps OAuth'. The main content area is titled 'All Users' and includes a search bar, a view selector (set to 'All Users'), and a table of users. The table has columns for Action, Full Name, Alias, Username, Role, Active, and Profile. Below the table are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty00g2w00000rv4reav.1pao0m223w50g@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	dsaradha dsaradha	dsar	saradhaharmara07@gmail.com		✓	System Administrator
<input type="checkbox"/> Edit	saradha saradha	ssara	dsaratha2003@gmail.com		✓	Standard User
<input type="checkbox"/> Edit	User Integration	integ	integration@00g2w00000rv4reav.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightsecurity@00g2w00000rv4reav.com		✓	Analytics Cloud Security User

Description:

The user activity is very easy and but more then problems of this activity.

Reports | Salesforce

govartscollegeariyalur-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru

To get future Google Chrome updates, you'll need Windows 10 or later. This computer is using Windows 7. [Learn more](#)

Search...

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

Reports

Recent

1 item

Search recent reports... [New Report](#) [New Folder](#) [Settings](#)

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	warehouse		Private Reports	dsaradha dsaradha	5/4/2023, 1:52 pm	

Created by Me

Private Reports

Public Reports

All Reports

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

To Do List

Description:

The following report activity is very difficult task of the project.

Dashboards | Salesforce

govartscollegeariyalur-dev-ed.develop.lightning.force.com/lightning/o/Dashboard/home?queryScope=mru

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Search...

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

Dashboards

Recent

2 items

Search recent dashboards... [New Dashboard](#) [New Folder](#) [Settings](#)

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	new premium		Private Dashboards	dsaradha dsaradha	11/4/2023, 11:28 am	
Created by Me	new dashboards		Private Dashboards	dsaradha dsaradha	5/4/2023, 1:54 pm	

Private Dashboards

All Dashboards

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

To Do List

Description:

The following activity dashboard is not visible .

4 Trailhead Profile Public URL

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

Team member 1 - <https://trailblazer.me/id/sophy7>

Team member 2 - <https://trailblazer.me/id/sjaisankar3>

Team member 3 - <https://trailblazer.me/id/smalar13>

5 ADVANTAGES & DISADVANTAGE

1. Improved Customer Relationship Management- Retail management using Sales Force enables retailers to manage customer relationships effectively by storing customer data and transaction history in a central system. This helps retailers to understand customer preferences and buying patterns, allowing them to provide personalized services.

2. Enhanced Efficiency- By automating sales, retailers can significantly reduce the time and cost involved in manually managing sales processes. Sales Force helps in managing inventory levels, automating promotional campaigns, and reducing order processing errors, leading to improved efficiency.

3. Increased Sales- Sales Force provides a comprehensive view of customer data and insights that enable retailers to make informed decisions. With improved targeting and personalized experiences,

retailers can increase customer satisfaction and loyalty, leading to increased sales.

DISADVANTAGE:

1. Costly- Retail management system using Sales Force can be expensive in terms of upfront costs of installation, integration, and customization. As the platform is cloud-based, ongoing charges are incurred to maintain the system.

2. Complex Implementation- Setting an efficient retail management system using Sales Force can be complicated and requires technical expertise. It can be challenging to customize the system according to the retailer's specific requirements.

3. Security Concerns- Sales Force stores sensitive customer data in the cloud, and there may be concerns about the security of the data. Breaches in security could lead to confidential data leaks, which can damage brand reputation and customer trust.

6 APPLICATIONS

1. Inventory Management- Retailers can use Sales Force to manage inventory levels in real-time, enabling them to restock products before they run out.

2. Marketing- Sales Force can be used to automate marketing campaigns by segmenting the customer base according to demographics, buying history, and preferences.

3. Reporting and Analytics- Sales Force provides reporting and analytics tools that enable retailers to gain insights into sales trends, customer behavior, and inventory analysis.

7 CONCLUSION

Retail management using Sales Force is advantageous as it improves customer relationship management, increases efficiency, and boosts sales. However, there are some disadvantages such as the high cost of implementation, complexity, and security concerns. Retailers can use Sales Force for inventory management, marketing, and reporting and analysis.

8 FUTURE SCOPE

The future of retail management lies in the use of Artificial Intelligence and Machine Learning technologies to analyze customer data and provide personalized experiences. Sales Force is investing heavily in these areas, and retailers can leverage these advancements to improve customer engagement and profitability. With the increasing demand for a seamless customer experience, Sales Force and other retail management platforms will continue to evolve to meet the needs of retailers and consumers.