

Project Report Template

INTRODUCTION:

1.1 Overview

Sales force can be used to create and manage beat plans for field sales teams. This includes scheduling store visits and tracking the results of those visits. Sales force for retail can also be used to track the performance of field sales teams, including metrics such as sales and customer satisfaction.

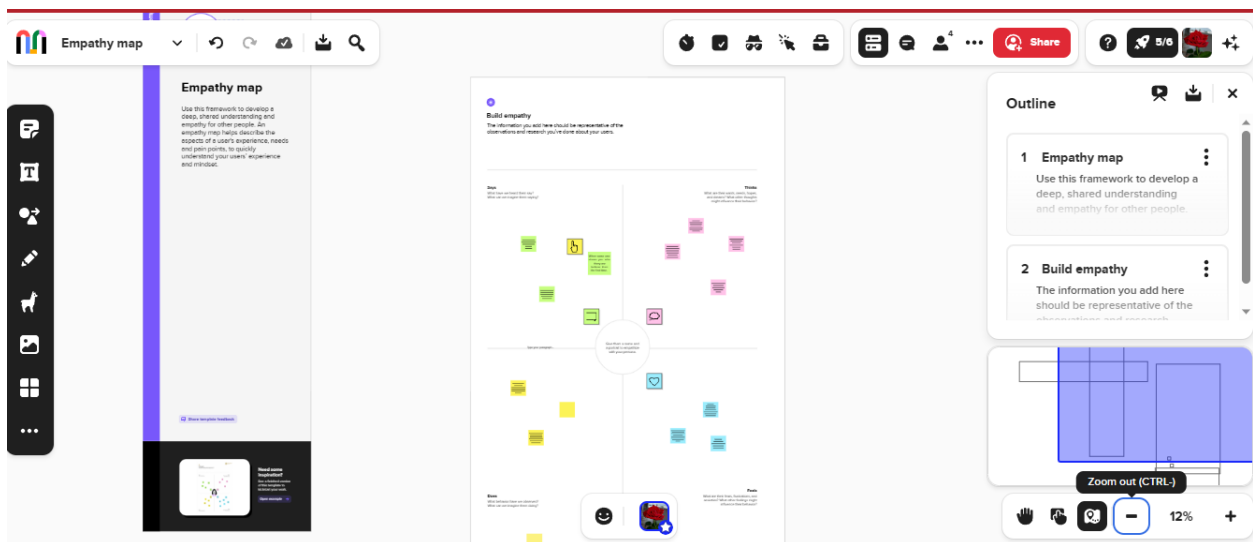
1.2 Purpose

Sales force management's purpose is to execute sales and marketing plans successfully, as well as to teach or train employees. It necessitates a well- trained sales team, versed with the ins and outs of the product or service, as well as the ability to answer all customer queries without hesitation.

Retail Management system can help retailers streamline all the process of running a store, from procurement to sales and back-office activities such as accounting and human resources.

2. Problem Definition and Design Thinking:

2.1 Empathy Map



2.2 Ideation and Brainstorming map Screenshot:



Brainstorm & idea prioritization

Use this template in your own brainstorming sessions so your team can unleash their imagination and start shaping concepts even if you're not sitting in the same room.

- 🕒 10 minutes to prepare
- 🕒 1 hour to collaborate
- 👤 2-8 people recommended



Before you collaborate

A little bit of preparation goes a long way with this session. Here's what you need to do to get going.

🕒 10 minutes



A Team gathering

Define who should participate in the session and send an invite. Share relevant information or pre-work ahead.



B Set the goal

Think about the problem you'll be focusing on solving in the brainstorming session.



C Learn how to use the facilitation tools

Use the Facilitation Superpowers to run a happy and productive session.

[Open article](#) →



Define your problem statement

What problem are you trying to solve? Frame your problem as a How Might We statement. This will be the focus of your brainstorm.

🕒 5 minutes

PROBLEM
How might we (you) manage problem statement?



Key rules of brainstorming

To run a smooth and productive session



Stay in topic.



Encourage wild ideas.



Defer judgment.



Listen to others.



Go for volume.



If possible, be visual.

Person 1

During an interview, many interviewers like to ask the questions about the company.

Make sure to highlight the reason it is beneficial for the people to work for the company.

Every employee probably has different ideas of what is best about the company.

Person 2

Employees ask this question for a variety of reasons.

They might want to know that you are organized and can do all of your work in the allotted time.



Person 3

Steady: A moderate pace that offers consistency work.

Peak: A fast pace in which clients or management require every task from you.

Slow: A release pace in which you have little or no current tasks.

Person 4

Effective communication is the most important part of team work.

Questioning is key when creating, that each team member has an idea of they looking within the greater team.

All workplace people challenges that being strong team member is given on act as a support reactions to staff members.

Retail Management In Different Questions

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TIP



Add customizable tags to sticky notes to make it easier to find, browse, organize, and categorize important ideas as themes within your mural.



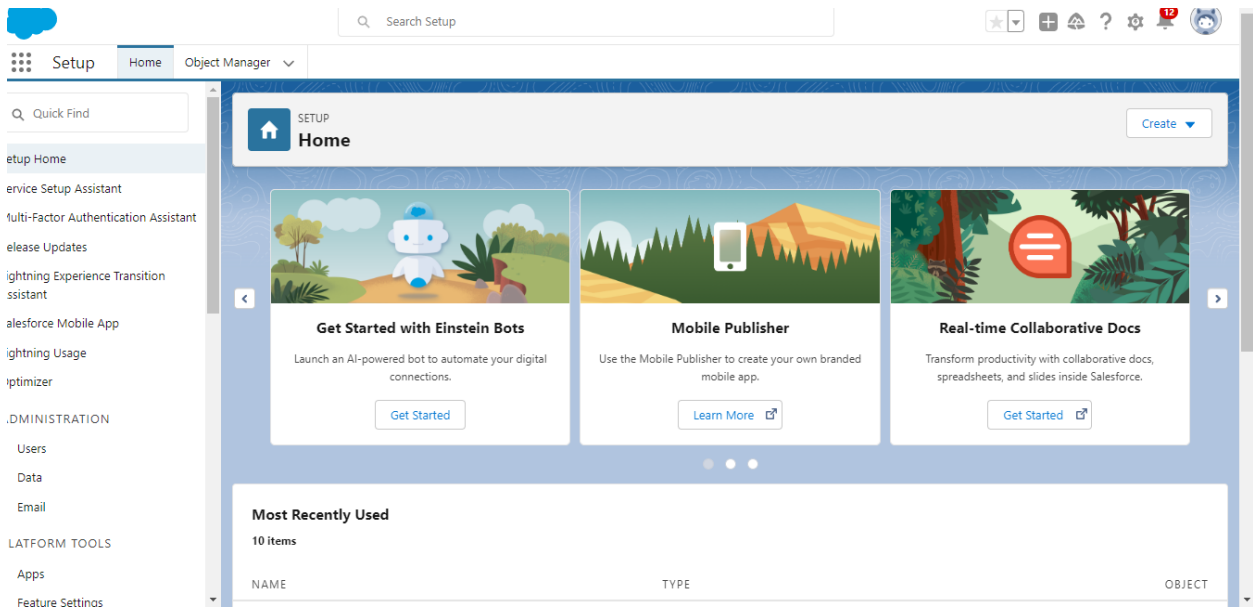
3.RESULT:

3.1 Data Model

Object Name	Fields In the Object
Object -1	Field label : Area Code Data Type : Phone
Object - 2	Field label : Active Data Type : Picklist
Object - 3	Field label: Close Date Data Type : Date

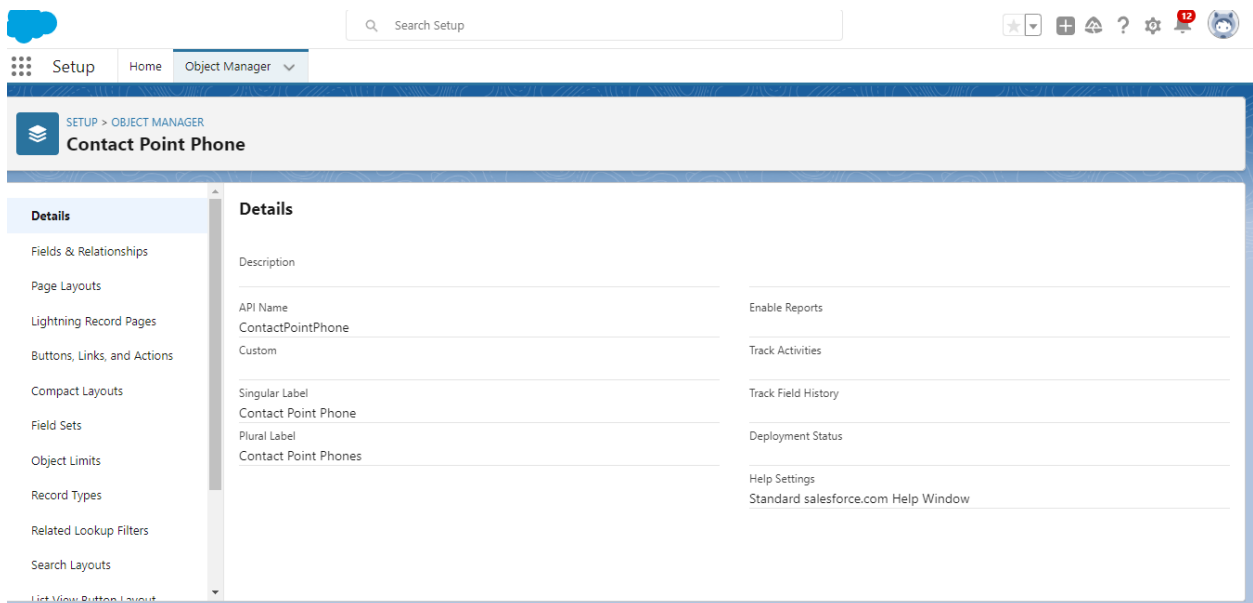
3.2 Activity and Screenshot:

Create sales force Org-creating Developer Account

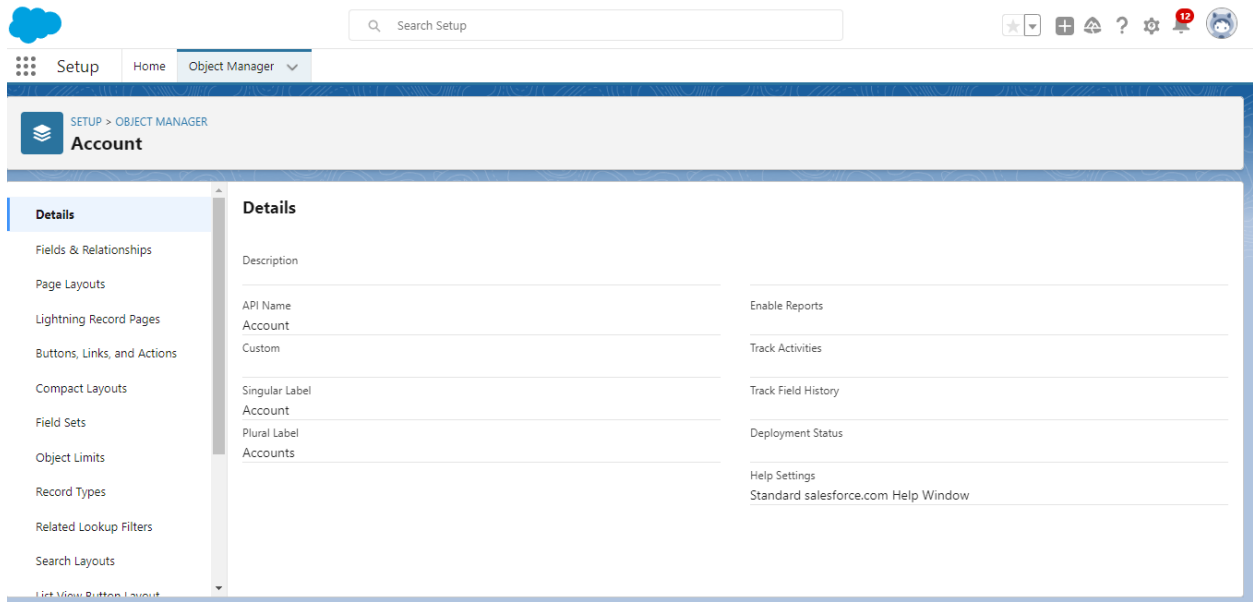


Object:

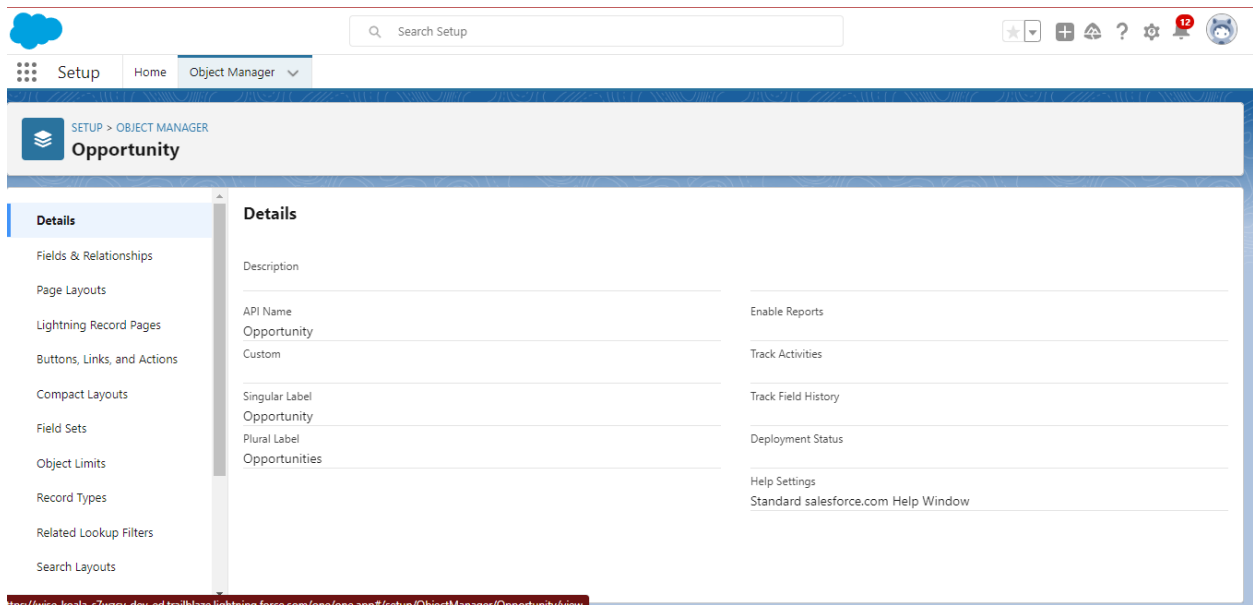
Creation of Contact Point Phone Object



Creation of Account Object:

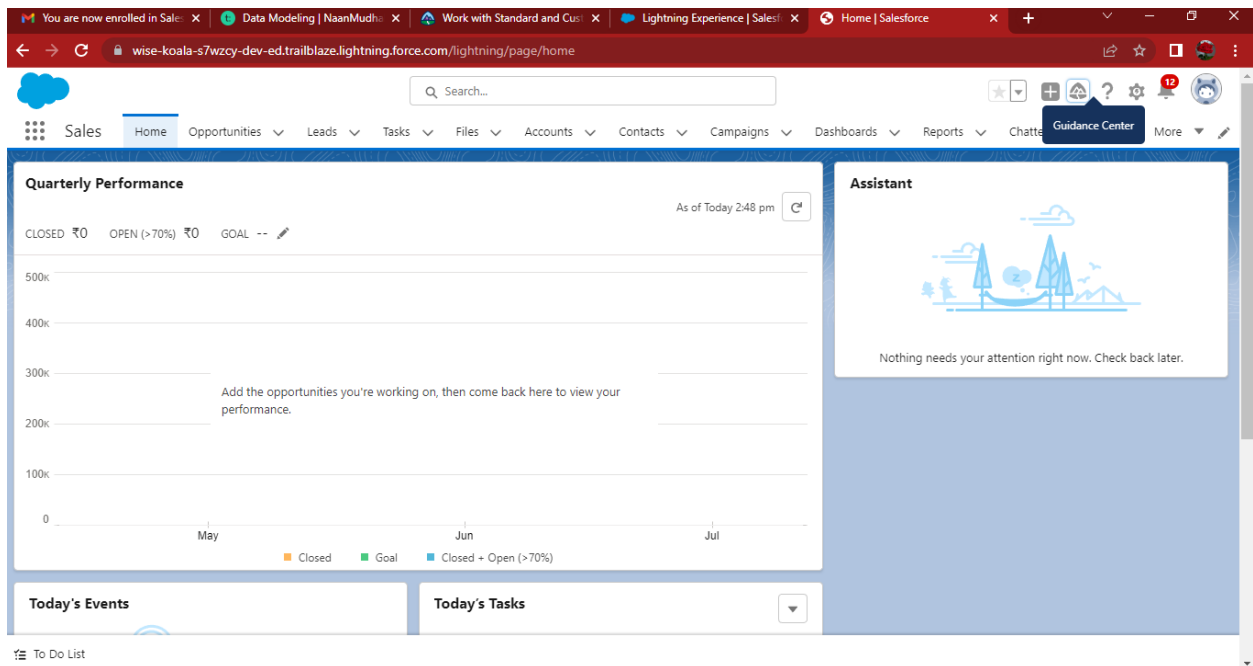


Creation of Opportunity Object:



Lighting App

Create The Sales App



Field and Relationship

Creation Field for The Contact Point Phone Objects

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Active from Date	ActiveFromDate	Date		
Active to Date	ActiveToDate	Date		
Area code	AreaCode	Text(30)		
Best time to contact end time	BestTimeToContactEndTime	Time		
Best time to contact start time	BestTimeToContactStartTime	Time		
Best time to contact time zone	BestTimeToContactTimezone	Picklist		
Extension number	ExtensionNumber	Text(30)		
Formatted international phone number	FormattedInternationalPhoneNumber	Text(250)		
Formatted national phone number	FormattedNationalPhoneNumber	Text(250)		
Is business phone	IsBusinessPhone	Checkbox		

Creation of Fields for The Account Objects

Setup Home Object Manager

SETUP > OBJECT MANAGER

Account

Details

Fields & Relationships

34+ Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Account Name	Name	Name		✓
Account Number	AccountNumber	Text(40)		
Account Owner	OwnerId	Lookup(User)		✓
Account Record Type	RecordTypeId	Record Type		✓
Account Site	Site	Text(80)		
Account Source	AccountSource	Picklist		
Active	Active__c	Picklist		
Annual Revenue	AnnualRevenue	Currency(18, 0)		
Billing Address	BillingAddress	Address		

Link Below Button Layout

Creation of Fields for The Opportunity Objects

Setup Home Object Manager

SETUP > OBJECT MANAGER

Opportunity

Details

Fields & Relationships

26+ Items, Sorted by Field Label

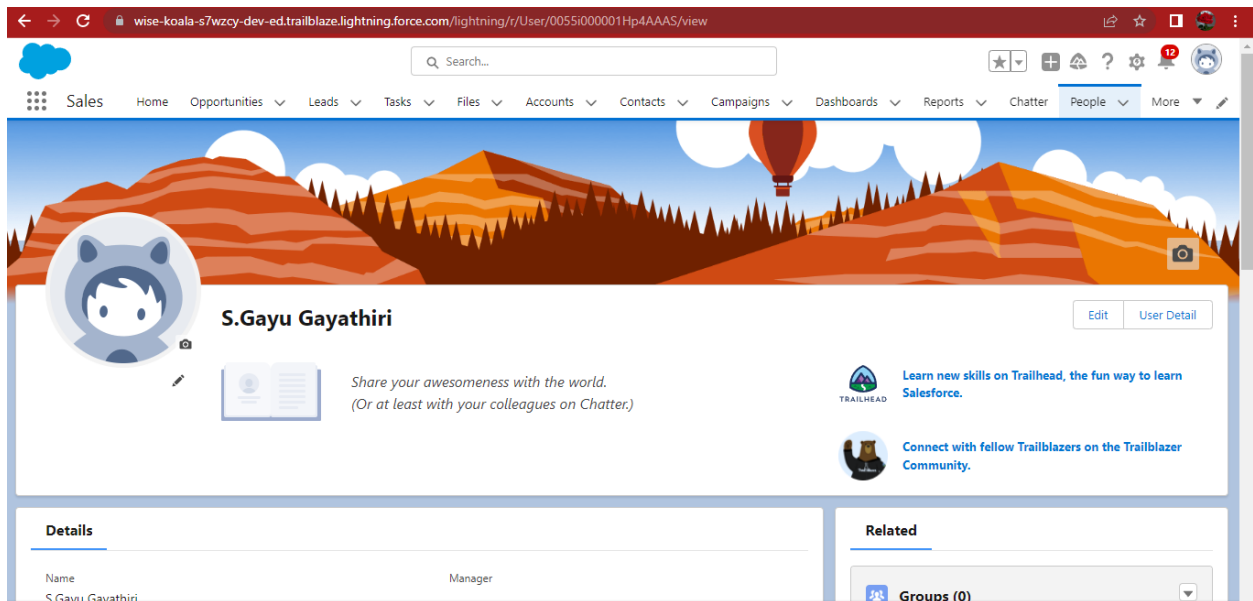
Quick Find

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Account Name	Accountid	Lookup(Account)		✓
Amount	Amount	Currency(16, 2)		
Close Date	CloseDate	Date		✓
Commission	Commission__c	Formula (Currency)		
Contract	Contractid	Lookup(Contract)		✓
Created By	CreatedByid	Lookup(User)		
Current Generator(s)	CurrentGenerators__c	Text(100)		
Delivery/Installation Status	DeliveryInstallationStatus__c	Picklist		

Text Area(32000)

Profile



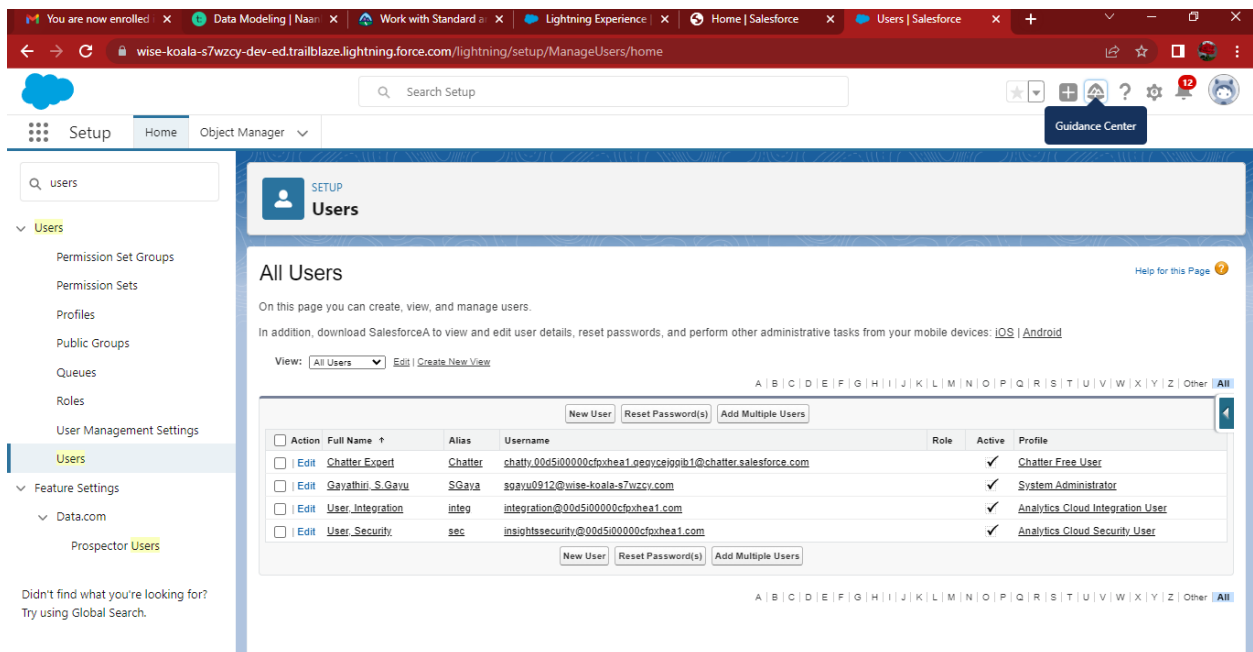
The screenshot shows a Salesforce user profile for S.Gayu Gayathiri. The profile includes a header with navigation tabs (Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, People, More) and a search bar. The main content area features a profile picture, name, and a bio: "Share your awesomeness with the world. (Or at least with your colleagues on Chatter.)". There are also links to Trailhead and the Trailblazer Community. Below the profile, there are sections for "Details" and "Related".

Details

Name	Manager
S.Gayu Gayathiri	

Related

Groups (0)



The screenshot shows the Salesforce Setup page for Users. The left sidebar contains navigation options: Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Feature Settings, Data.com, and Prospector Users. The main content area is titled "All Users" and includes a search bar, a "View" dropdown (set to "All Users"), and a "Create New View" button. Below this is a table of users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists four users: Chatter Expert, Gayathiri S.Gayu, User Integration, and User Security. At the bottom, there are buttons for "New User", "Reset Password(s)", and "Add Multiple Users".

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](#)

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatv.00d5i00000cfpxhea1_govscelgpb1@chatter.salesforce.com		✓	Chatter Free User
Edit	Gayathiri S.Gayu	SGayu	sgayu0912@wise-koala-s7wzcy.com		✓	System Administrator
Edit	User Integration	integ	integration@00d5i00000cfpxhea1.com		✓	Analytics Cloud Integration User
Edit	User Security	sec	insightsssecurity@00d5i00000cfpxhea1.com		✓	Analytics Cloud Security User

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

Permission Sets

Permission 1

wise-koala-s7wzcy-dev-ed.trailblaze.lightning.force.com/lightning/setup/PermSets/page?address=%2F0P55i000001NB5b

Setup Home Object Manager

perm

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

Didn't find what you're looking for?
Try using Global Search.

Permission Sets

Permission Set: Buyer Manager

Find Settings... Clone Manage Assignments

Permission Set Overview

Description	Includes all Buyer capabilities, and allows access to manage calls and orders related to their account. Also lets users manage contacts and reports.	API Name	B2BBuyerManager
License	B2B Buyer Manager Permission Set One Seat	Namespace Prefix	force
Session Activation Required	<input type="checkbox"/>	Created By	salesforce.com, inc., 12/04/2023, 7:08 pm
Last Modified By	salesforce.com, inc., 12/04/2023, 7:11 pm		

Apps

Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform [Learn More](#)

- Object Settings**
Permissions to access objects and fields, and settings such as tab availability
- Flow Access**
Permissions to execute Flows
- Custom Metadata Types**
Permissions to access custom metadata types
- Custom Setting Definitions**
Permissions to access custom settings

Permission 2

wise-koala-s7wzcy-dev-ed.trailblaze.lightning.force.com/lightning/setup/PermSets/page?address=%2F0P55i000001NB5b

Setup Home Object Manager

perm

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

Didn't find what you're looking for?
Try using Global Search.

Permission Sets

Permission Set: Sales Cloud User

Find Settings... Clone Manage Assignments

Permission Set Overview

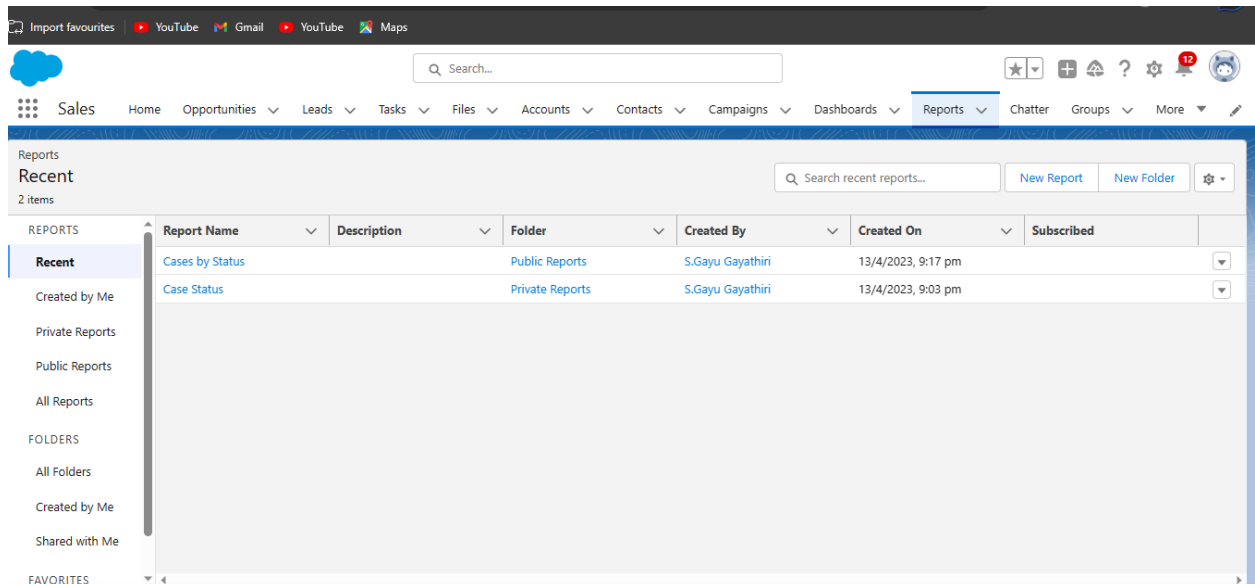
Description	Denotes that the user is a Sales Cloud user.	API Name	SalesUserPsi
License	Sales User	Namespace Prefix	force
Session Activation Required	<input type="checkbox"/>	Created By	salesforce.com, inc., 12/04/2023, 7:08 pm
Last Modified By	salesforce.com, inc., 12/04/2023, 7:11 pm		

Apps

Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform [Learn More](#)

- Object Settings**
Permissions to access objects and fields, and settings such as tab availability
- App Permissions**
Permissions to perform app-specific actions, such as "Manage Call Centers"
- Flow Access**
Permissions to execute Flows
- Custom Metadata Types**
Permissions to access custom metadata types
- Custom Setting Definitions**

Reports



4.Trailhead Profile Public URL

Team Lead-[https://trailblazer .me/id/gayu143](https://trailblazer.me/id/gayu143)

Team Member 1-<https://trailblazer.me/id/dlakshmi123>

Team Member 2-<https://trailblazer.me/id/elavm1>

Team Member 3-<https://trailblazer.me/id/harvs10>

5. ADVANTAGES &DISADVANTAGES :

1. Customization

Advantages

Salesforce is designed to not only provide a significant number of features out of the box, but is also highly customizable. Using point-and-click tools, built-in UI/UX features, and automation, Sales force can quickly be tailored and implemented to meet many use cases, streamline business process, and help organizations become more efficient. But the platform also supports complex code, integrations with other systems, and much more.

Disadvantages

With such a flexible, customizable platform, it can be easy to build in too much customization, and some integrations come with limitations. Additionally, it can be easy for organizations taking on new implementations to try to do too much, too soon, overwhelming users with too many features and processes to learn and fully utilize. Working with an implementation partner like Higher Echelon can help

your organization determine how to prioritize needs and get the most out of your Sales force org at a pace and level of customization that is most effective.

2. Cloud-Based Functionality

Advantages

Implementing cloud-based solutions is all the rage these days, and with good reason. CRMs that run on physical, on-site servers can limit connectivity and make it difficult for employees to access company data off site in a secure manner. Salesforce runs on the cloud, meaning that it operates out of data centers available to users over the internet. Cloud-native software provides more **flexibility and accessibility to users and makes it easier to scale to support** a growing team. As a result, organizations gain access to on-demand computing resources and can optimize business without worrying about provisioning and maintaining physical infrastructure.

Disadvantages

Generally, though there are tools available to help address specific needs, accessing a cloud-based tool like Salesforce requires an internet connection. For physical locations without the internet or a stable connection, accessing resources can be challenging.

3.Overall Cost and Pricing

Advantages

The Salesforce pricing model allows organizations to pay per license, ensuring the correct number of licenses can be purchased, maintained, and scaled. Additionally, licenses aren't one-size-fits-all; different license types provide flexibility based on the access and features different users need to have available.

Disadvantages

Although Salesforce has a wide range of capabilities and offers a scalable pricing model, additional users come with an additional cost, as does ongoing customization, particularly if code is involved. This can lead to higher costs compared to other CRMs. However, partnering with a Salesforce implementation specialist can help your organization identify cost-effective, long-term solutions to optimize your investment.

APPLICATION

Sales and customer management :

Salesforce can manage customer relationships, track sales, and handle customer support and service requests. This can help manufacturing companies improve their sales processes and improve customer service.

Inventory and supply chain management :

Salesforce can manage inventory levels, track orders, and monitor the supply chain. This can help manufacturing companies ensure they have the right products in stock and can quickly and efficiently fulfil orders.

Look for References and Case Studies :

A good way to evaluate potential implementation partners is to look for references and case studies from their previous clients. This can provide insight into the quality of their work and the results they have delivered for other businesses.

Consider The Cost :

Cost is an essential factor to consider when choosing Salesforce partner companies. It is vital to get quotes from multiple partners and compare the costs and services offered to ensure that you are getting value for your money.

CONCLUSION:

In conclusion, Salesforce is a powerful platform that can help retailers meet the demands of the rapidly changing retail landscape. With its advanced customer engagement, data management, inventory management, omnichannel experience, and collaboration capabilities, Salesforce is a must-have for any retail business looking to stay ahead of the competition.

FUTRUE SCOPE:

Growth is considered invertible in the Salesforce sector. It is taken as the best CRM system available so far and ranked #1 for a consecutive decade. There are millions of Salesforce customers worldwide and definitely require Salesforce Developers for the implementation of the platform. As a Salesforce Developer ,you have to work in the complex environments sometimes that demand a depth of knowledge of JAVA ,APEX, or similar programming languages . If you belong to a technical background then Salesforce can be an amazing platform to develop.

