

RETAIL MANAGEMENT APPLICATION

1 INTRODUCTION

Overview

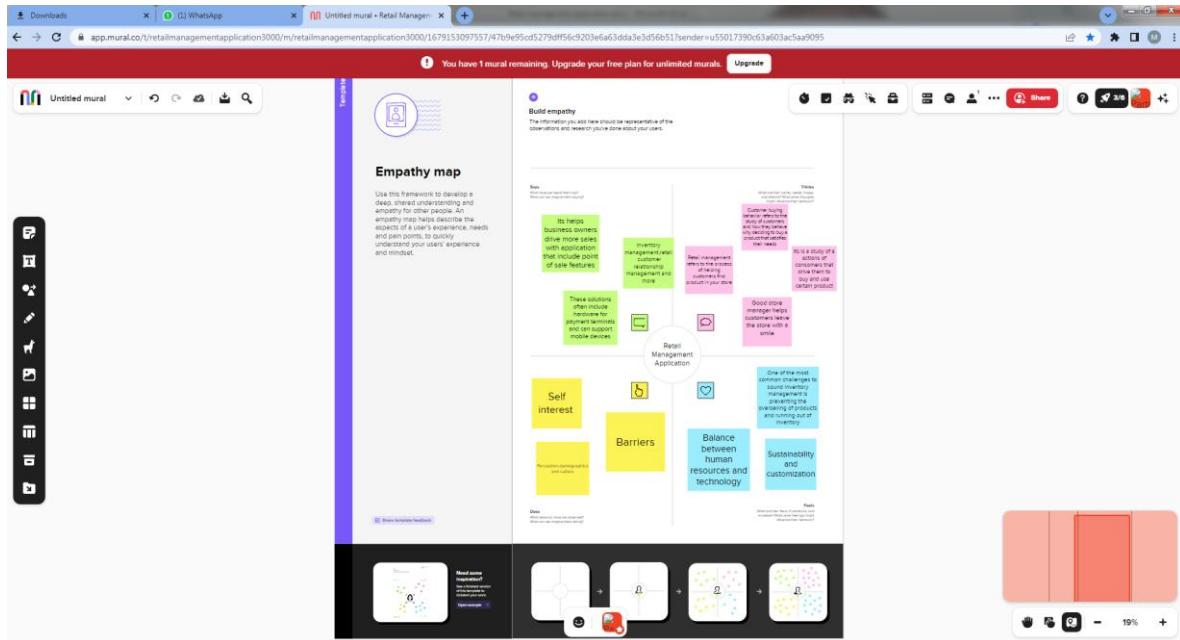
Retail management optimizes internal processes such as inventory management, offline and online storefronts, warehouse operations, payment and accounting, and human resources. Retail management improves overall company cohesion.

Purpose

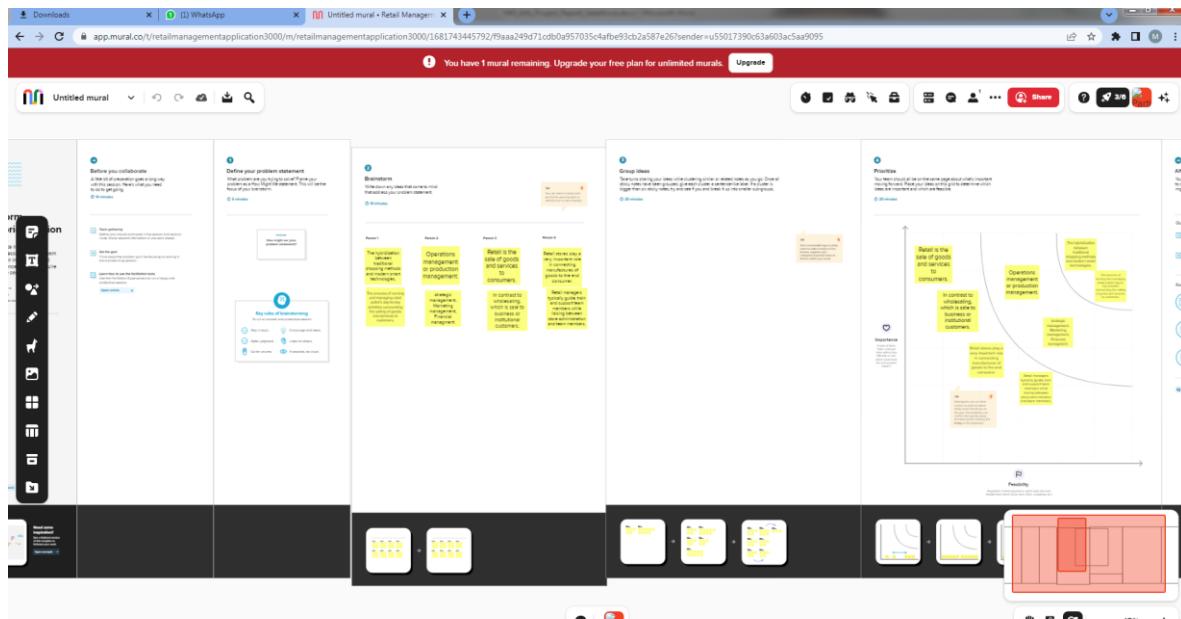
Retail management refers to the process of helping customers find products in your store. It includes everything from increasing your customer pool to how products are presented, and how you fulfill a customer's needs. A good store manager helps customers leave the store with a smile.

2 Problem Definition & Design Thinking

Empathy Map



Ideation & Brainstorming Map



3 RESULT

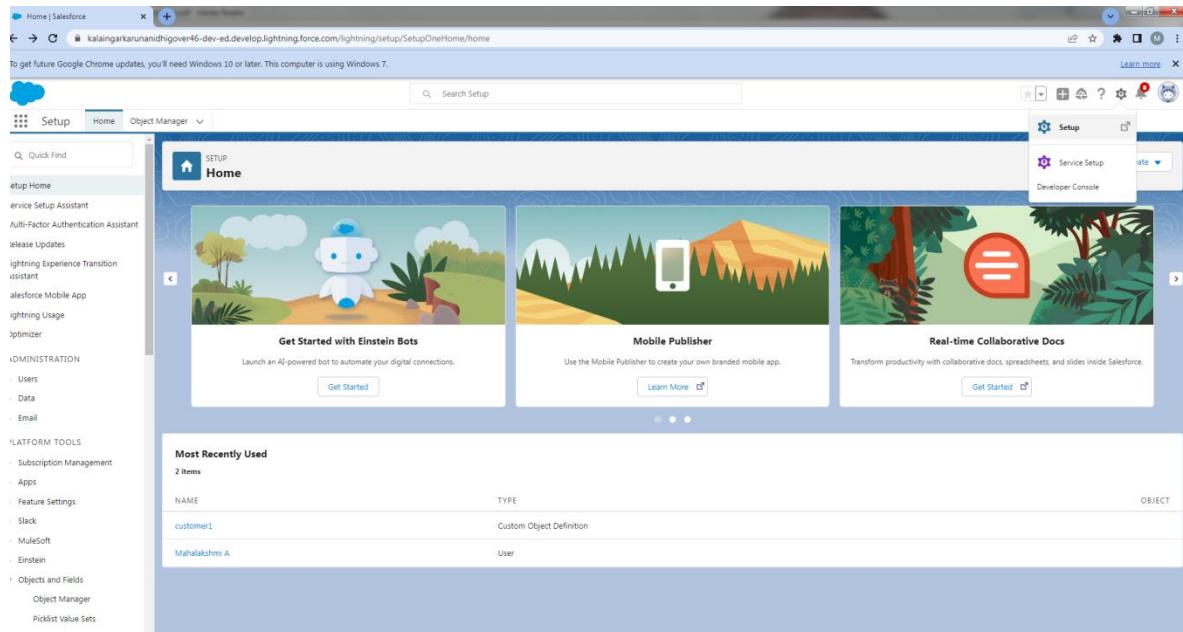
Data Model:

Object name	Fields in the Object	
obj1		
	Field label	Data type
	Standard object	Standard field
obj2		
	Field label	Data type
	Custom object	Custom field

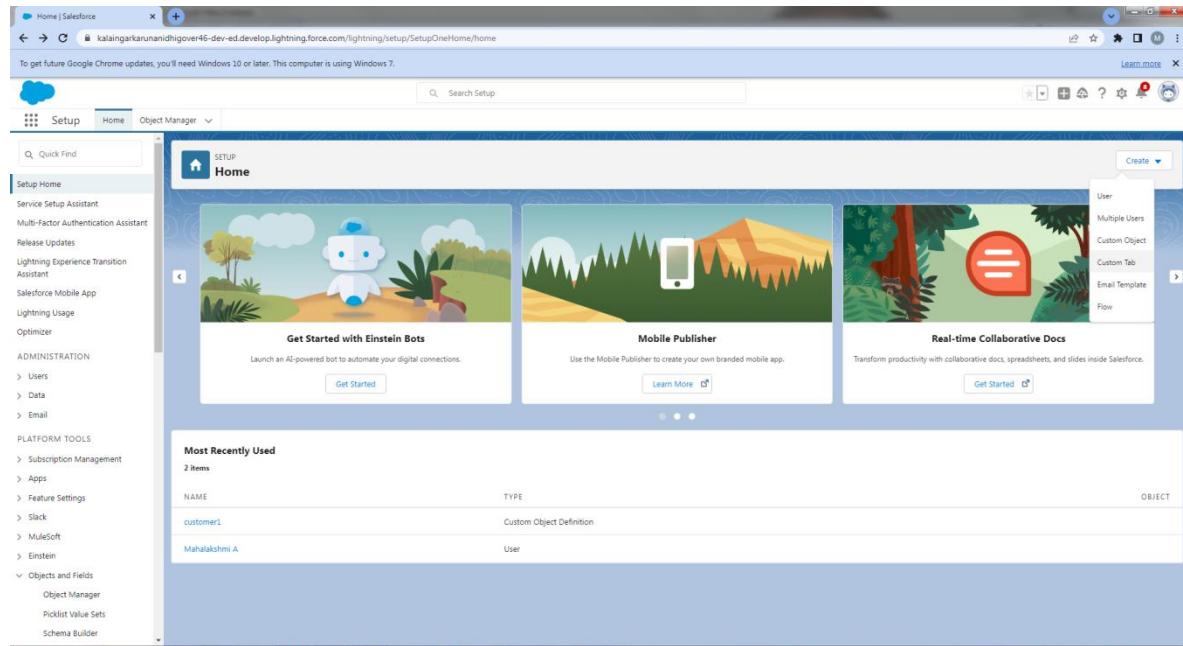
Activity & Screenshot

Milestone-1

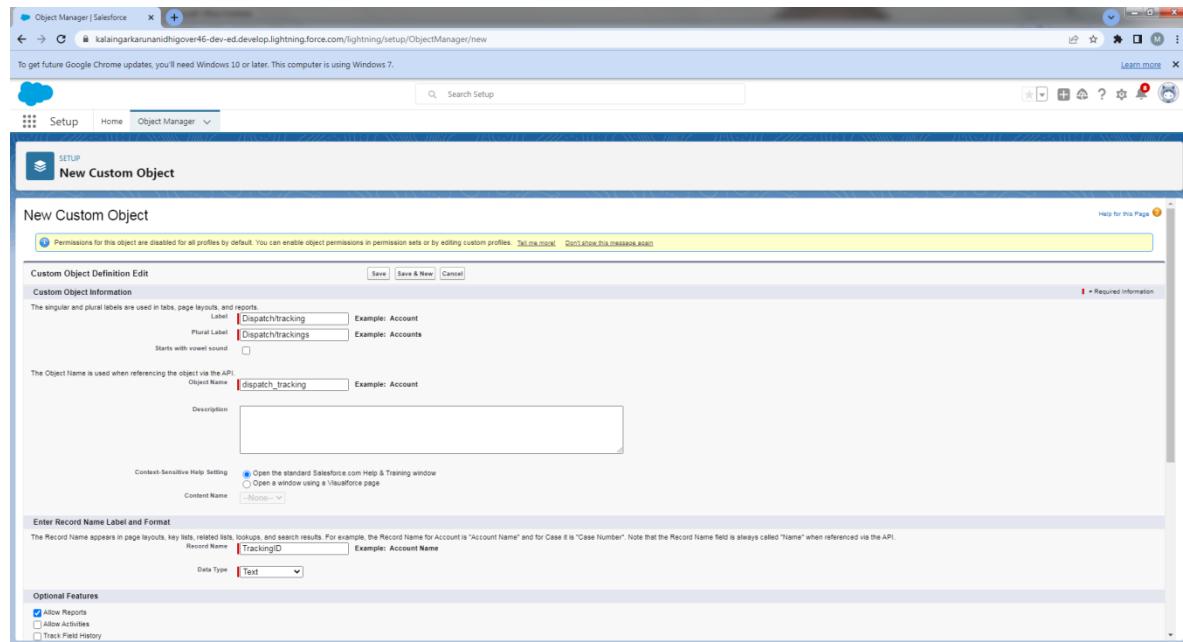
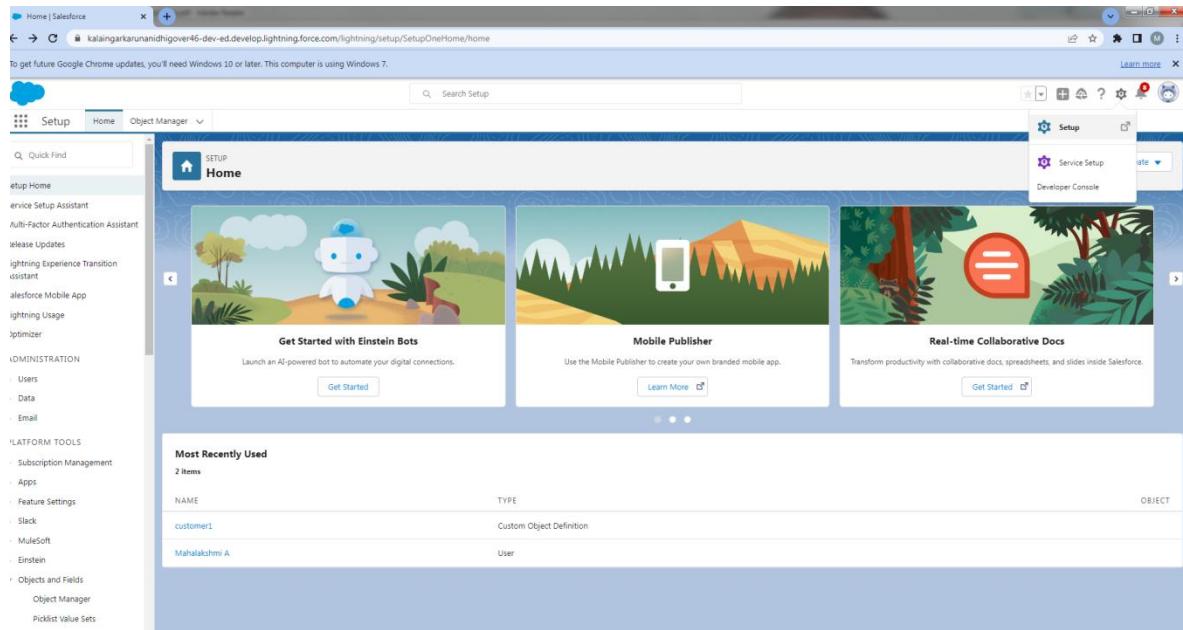
Project Report Template



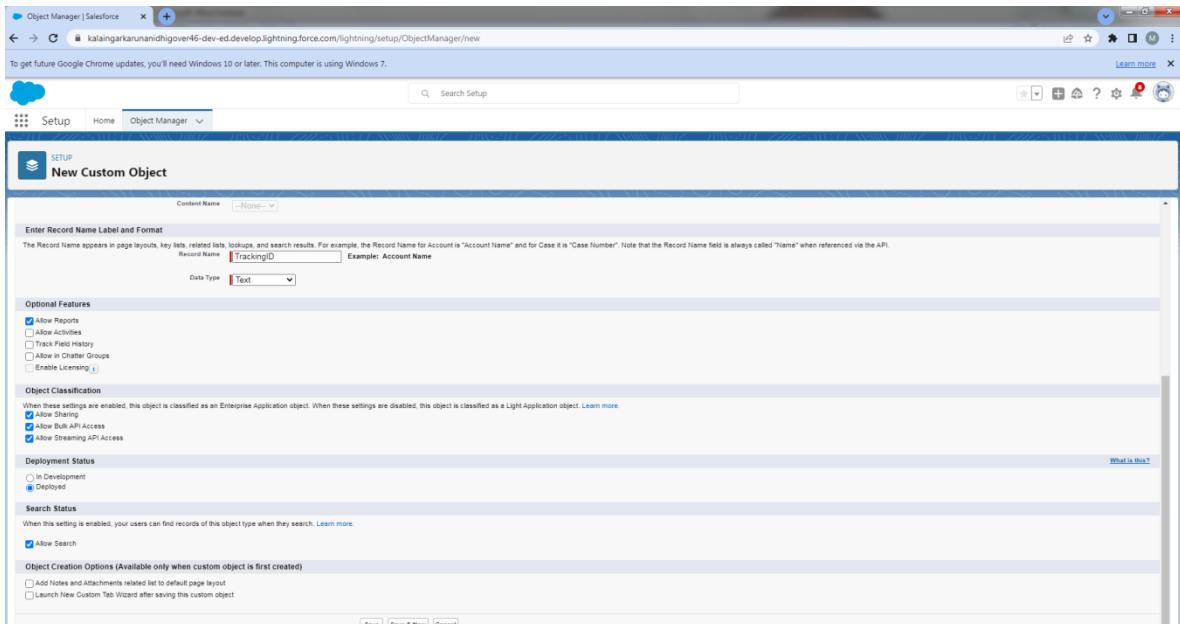
Milestone-2



Project Report Template

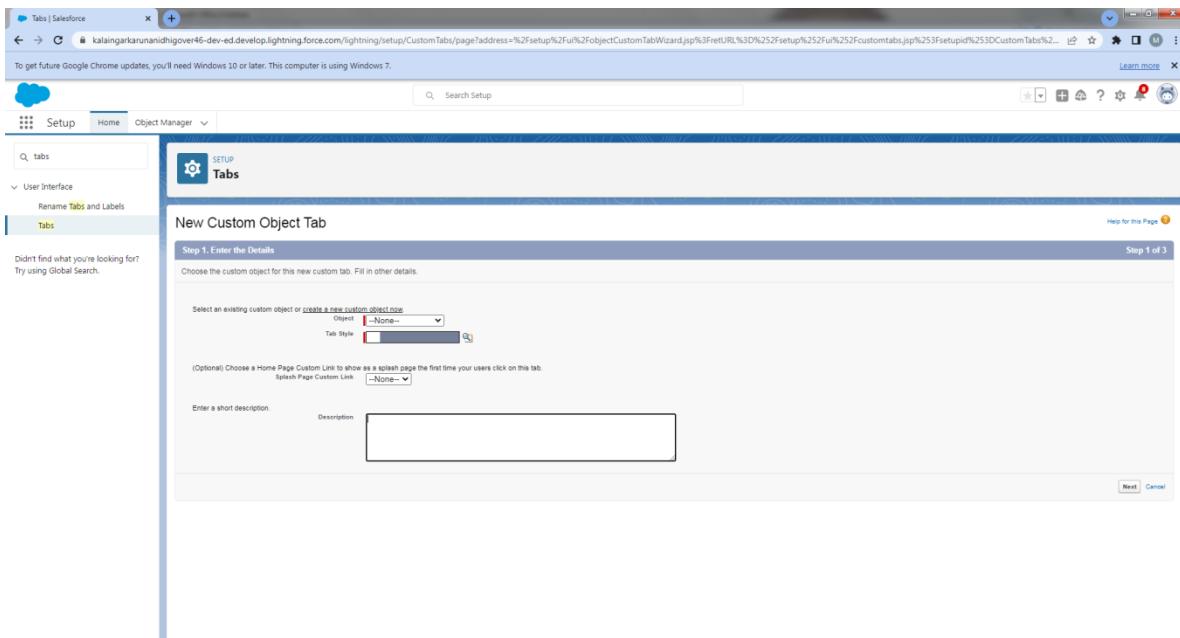


Project Report Template



The screenshot shows the Salesforce Object Manager interface. A new custom object is being created with the following details:

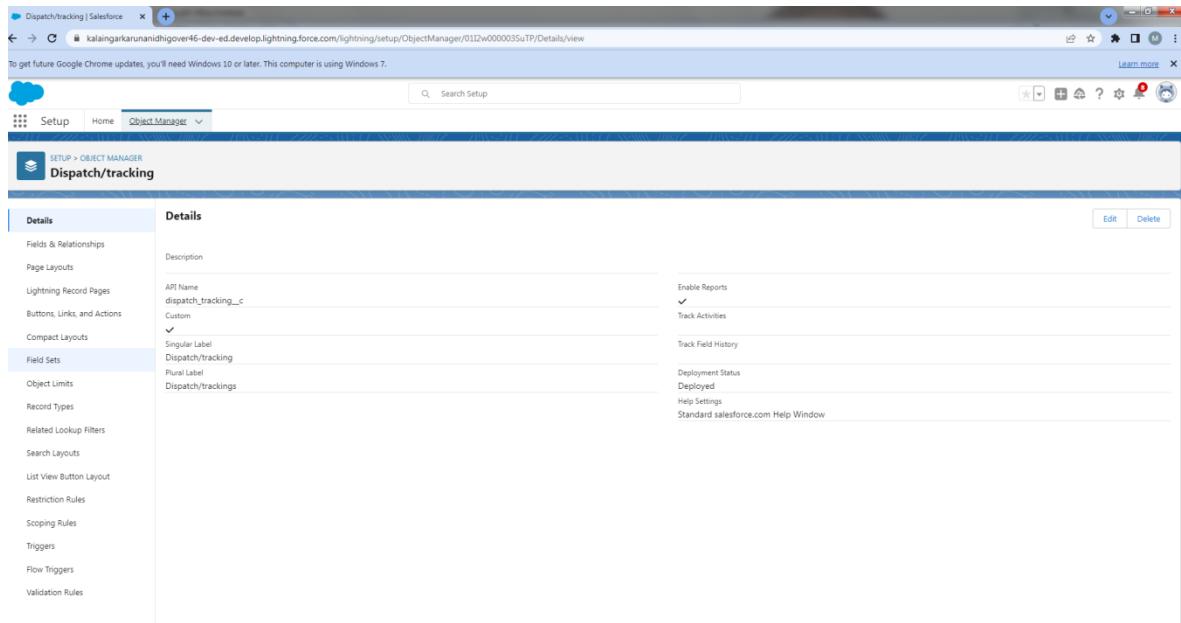
- Content Name:** TrackingID
- Record Name:** TrackingID
- Data Type:** Text
- Optional Features:**
 - Allow Reports
 - Allow Activities
 - Fast Field Entry
 - Available in Chatter Groups
 - Events Licensing
- Object Classification:** When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. Learn more.
- Allow Shared
- Allow Bulk API Access
- Allow Streaming API Access
- Deployment Status:** Deployed
- Search Status:** Allow Search
- Object Creation Options (Available only when custom object is first created):**
 - Add Notes and Attachments related list to default page layout
 - Launch New Custom Tab Wizard after saving this custom object



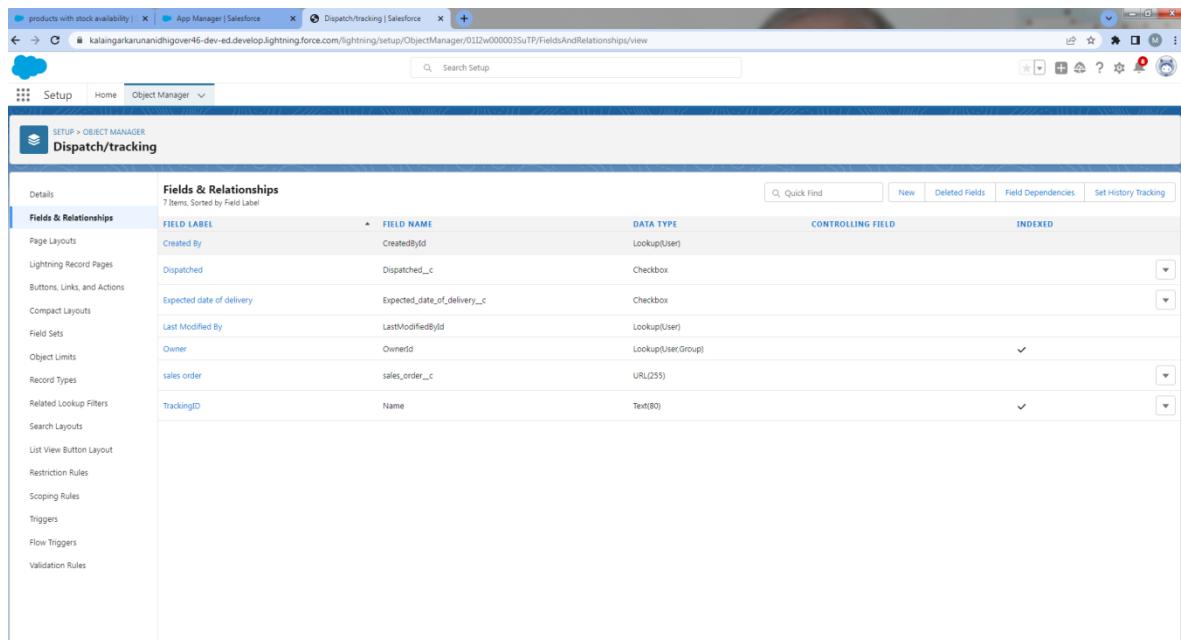
The screenshot shows the Salesforce Tabs setup wizard. A new custom object tab is being created with the following details:

- Step 1. Enter the Details:**
 - Select an existing custom object or [create a new custom object now](#).
 - Object:** None
 - Tab Style:** Standard
 - (Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab. Splash Page Custom Link: None
 - Description:** (Empty text area)
- Step 1 of 3**

Project Report Template



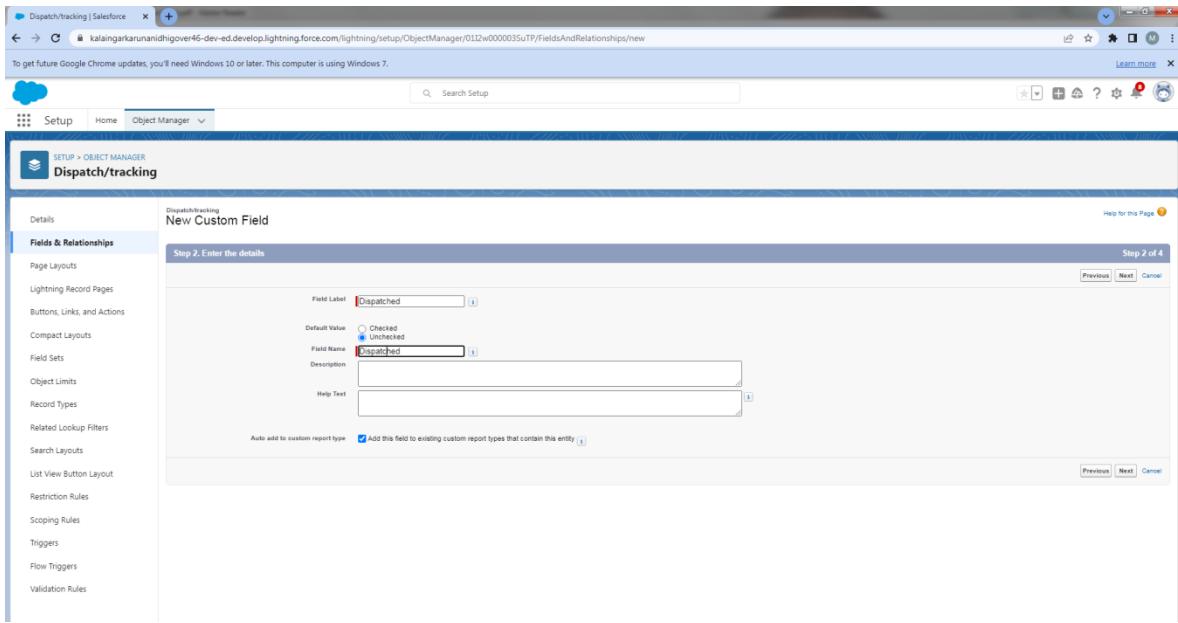
The screenshot shows the Salesforce Object Manager interface for the 'Dispatch/tracking' object. The left sidebar lists various configuration tabs: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, Triggers, Flow Triggers, and Validation Rules. The main content area displays the 'Details' tab for the 'Dispatch/tracking' object. It includes fields for API Name (dispatch_tracking_c), Singular Label (Dispatch/tracking), Plural Label (Dispatch/trackings), and Description. On the right, there are sections for Reports (Enable Reports checked), Activities (Track Activities checked), History (Track Field History checked), Deployment Status (Deployed), Help Settings (Standard salesforce.com Help Window), and a 'Help' button.



The screenshot shows the 'Fields & Relationships' section of the Salesforce Object Manager for the 'Dispatch/tracking' object. The left sidebar is identical to the previous screenshot. The main content area shows a table titled 'Fields & Relationships' with 7 items, sorted by Field Label. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data is as follows:

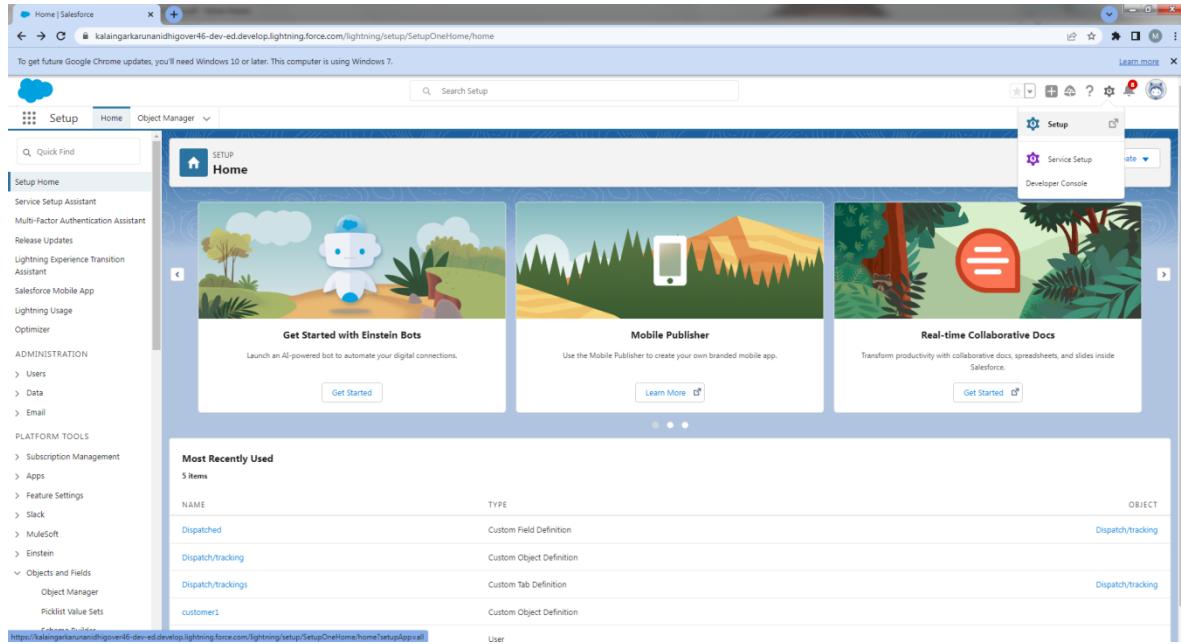
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Dispatched	Dispatched_c	Checkbox		
Expected date of delivery	Expected_date_of_delivery_c	Checkbox		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		<input checked="" type="checkbox"/>
sales order	sales_order_c	URL(255)		
TrackingID	Name	Text(80)		<input checked="" type="checkbox"/>

Project Report Template



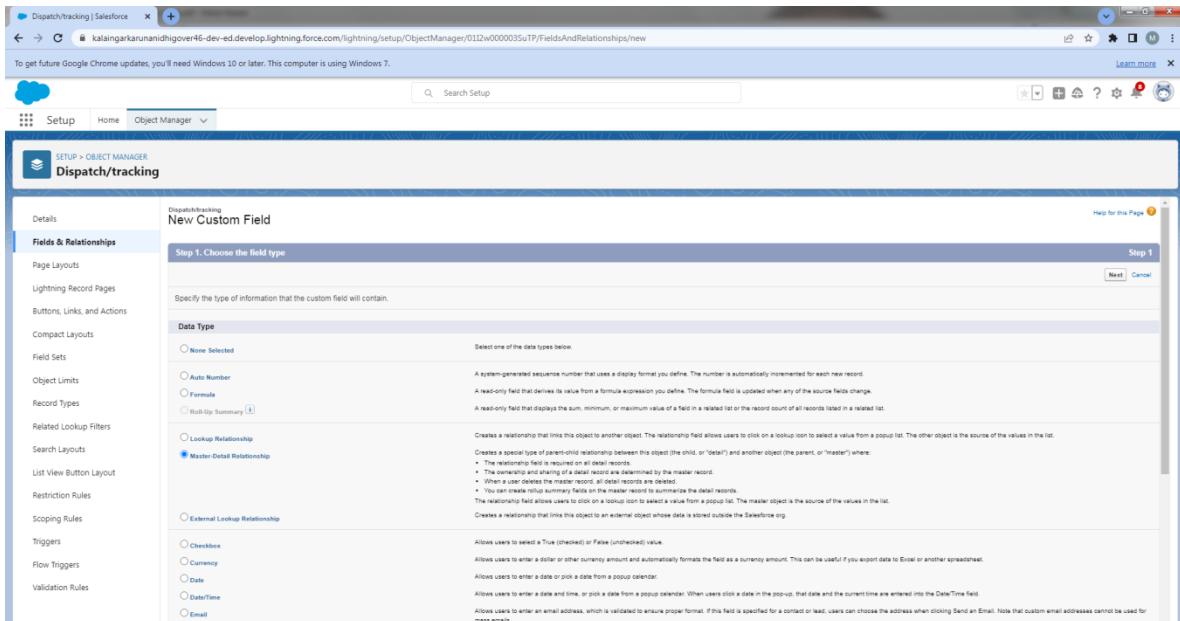
The screenshot shows the Salesforce Object Manager setup page for creating a new custom field. The object being created is 'Dispatch/tracking'. The field name is 'Dispatched', and it is defined as a checkbox type ('Unchecked' is selected). The field label is also 'Dispatched'. There is a description and help text section, but they are currently empty. A note at the bottom indicates that the field can be added to existing report types. Navigation buttons for 'Previous', 'Next', and 'Cancel' are visible at the bottom right.

Milestone-3



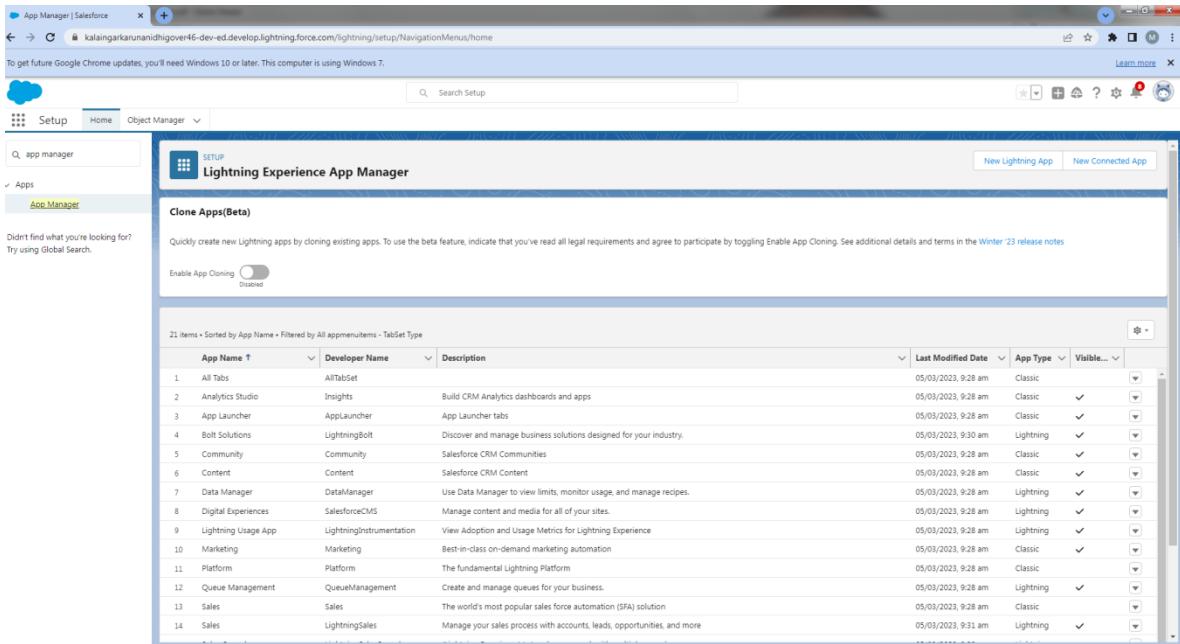
The screenshot shows the Salesforce Setup Home page. It features three main promotional cards: 'Get Started with Einstein Bots', 'Mobile Publisher', and 'Real-time Collaborative Docs'. Below these cards is a section titled 'Most Recently Used' which lists five items: 'Dispatched' (Custom Field Definition), 'Dispatch/tracking' (Custom Object Definition), 'Dispatch/tracking' (Custom Tab Definition), 'customer1' (Custom Object Definition), and 'User'. The URL in the browser bar is <https://kalaignarkarunandighover46-dev-ed.lightning.force.com/lightning/setup/SetupOneHome/home#setupApps>.

Project Report Template



The screenshot shows the Salesforce Setup interface under the Object Manager. A new custom field is being created for the 'Dispatch/tracking' object. The 'Data Type' section is open, showing various options like None Selected, Auto Number, Formula, Roll-Up Summary, Lookup Relationship, Master-Detail Relationship, External Lookup Relationship, Checkbox, Currency, Date, DateTime, and Email. The 'Master-Detail Relationship' option is selected. The 'Description' field contains the placeholder 'Specify the type of information that the custom field will contain.' and the 'Help for this Page' link is visible.

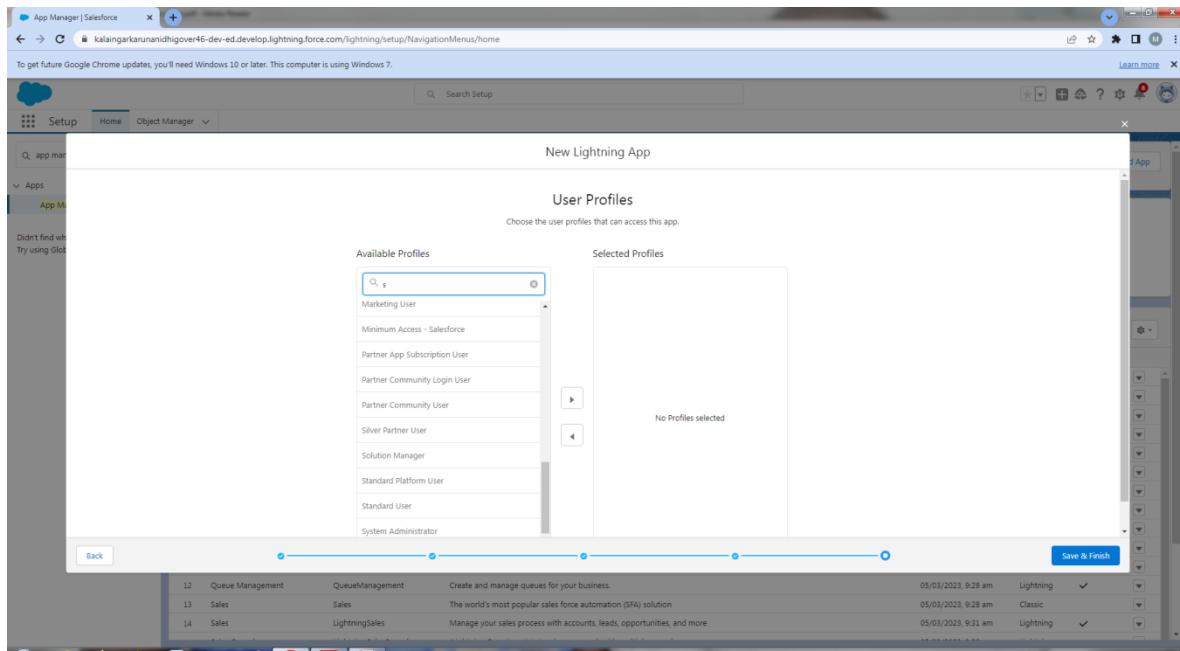
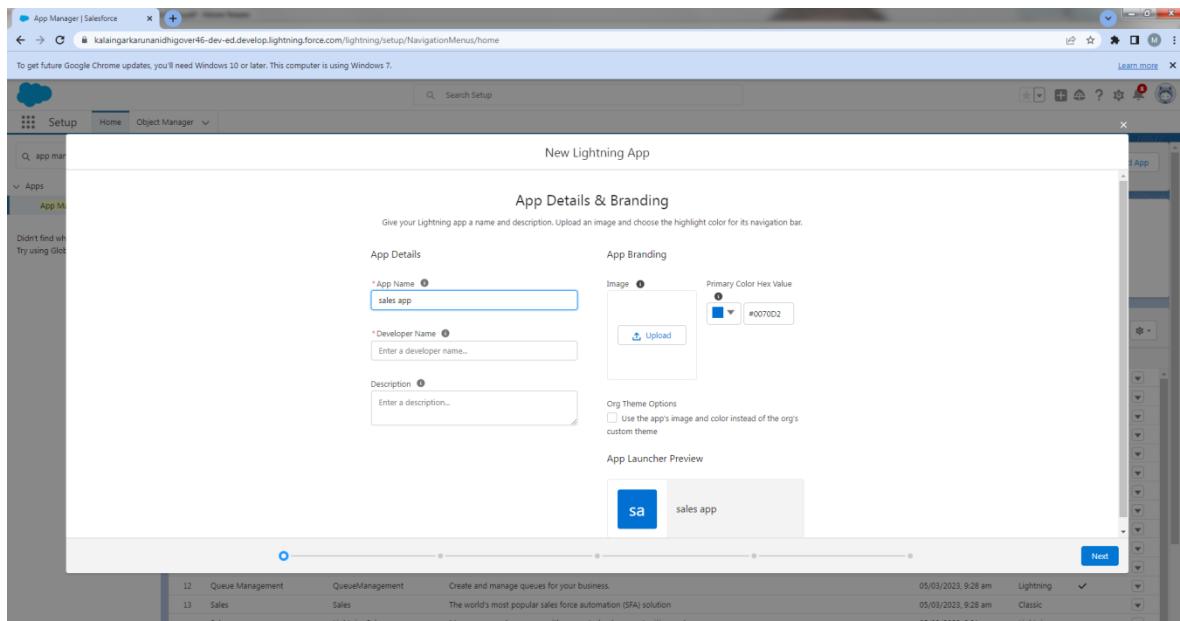
Milestone-4



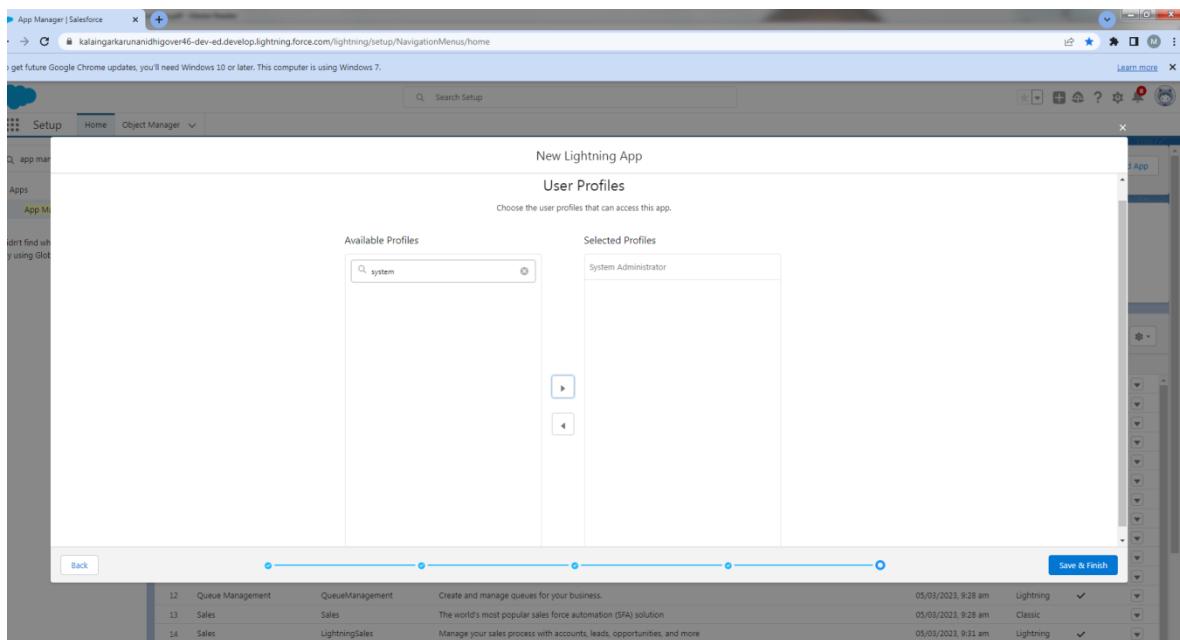
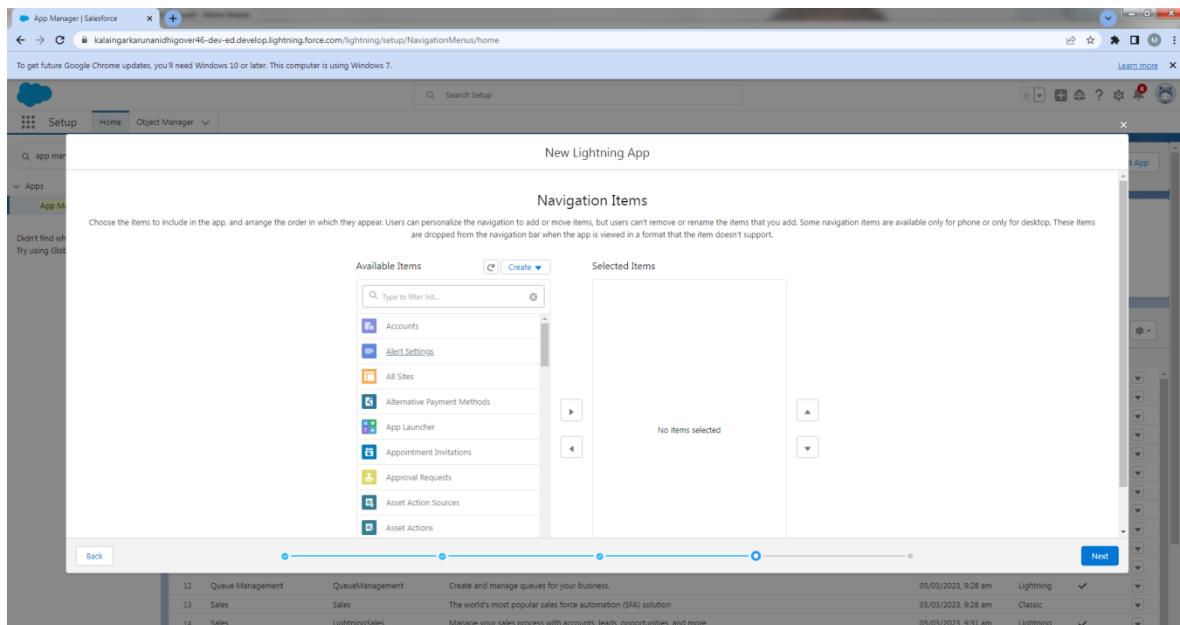
The screenshot shows the Lightning Experience App Manager. The 'Clone Apps(Beta)' section is displayed, with a note about enabling app cloning. A table lists 21 items, sorted by App Name, filtered by TabSet Type. The columns include App Name, Developer Name, Description, Last Modified Date, App Type, and Visibility. The table lists various Salesforce apps such as All Tabs, Analytics Studio, App Launcher, Bolt Solutions, Community, Content, Data Manager, Digital Experiences, Lightning Usage App, Marketing, Platform, Queue Management, Sales, and Sales.

App Name	Developer Name	Description	Last Modified Date	App Type	Visible...
1 All Tabs	AllTabSet	Build CRM Analytics dashboards and apps	05/03/2023, 9:28 am	Classic	✓
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	05/03/2023, 9:28 am	Classic	✓
3 App Launcher	AppLauncher	App Launcher tabs	05/03/2023, 9:28 am	Classic	✓
4 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	05/03/2023, 9:30 am	Lightning	✓
5 Community	Community	Salesforce CRM Communities	05/03/2023, 9:28 am	Classic	✓
6 Content	Content	Salesforce CRM Content	05/03/2023, 9:28 am	Classic	✓
7 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	05/03/2023, 9:28 am	Lightning	✓
8 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	05/03/2023, 9:28 am	Lightning	✓
9 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	05/03/2023, 9:28 am	Lightning	✓
10 Marketing	Marketing	Best-in-class on-demand marketing automation	05/03/2023, 9:28 am	Classic	✓
11 Platform	Platform	The fundamental Lightning Platform	05/03/2023, 9:28 am	Classic	✓
12 Queue Management	QueueManagement	Create and manage queues for your business.	05/03/2023, 9:28 am	Lightning	✓
13 Sales	Sales	The world's most popular sales force automation (SFA) solution	05/03/2023, 9:28 am	Classic	✓
14 Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	05/03/2023, 9:31 am	Lightning	✓

Project Report Template

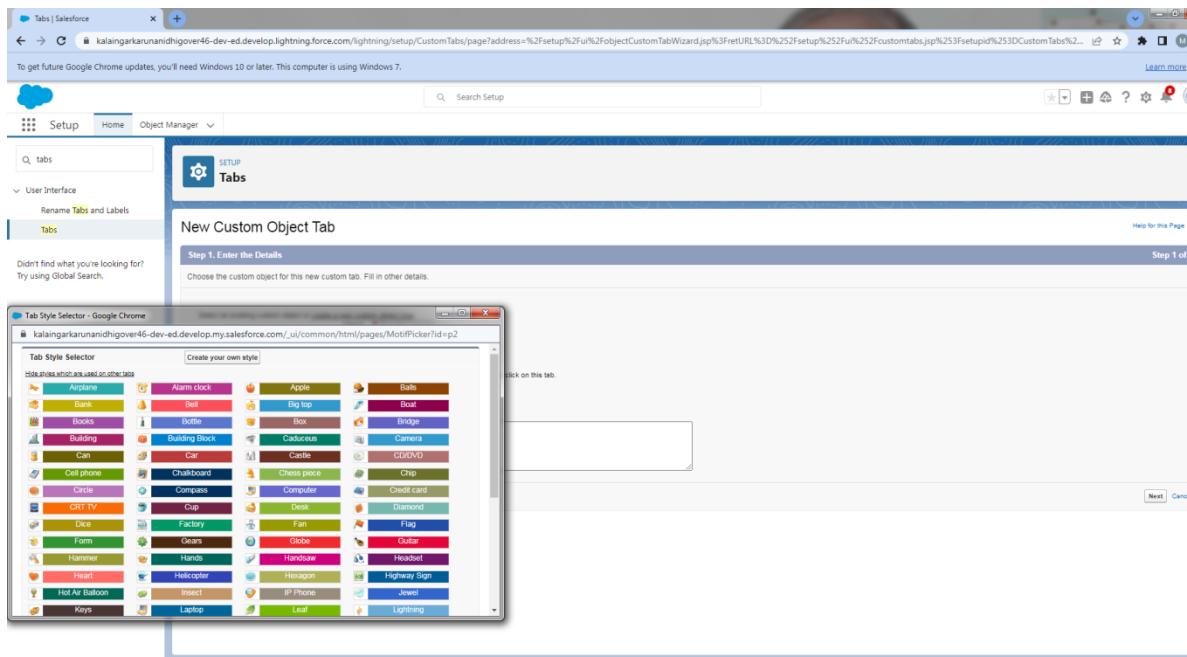


Project Report Template

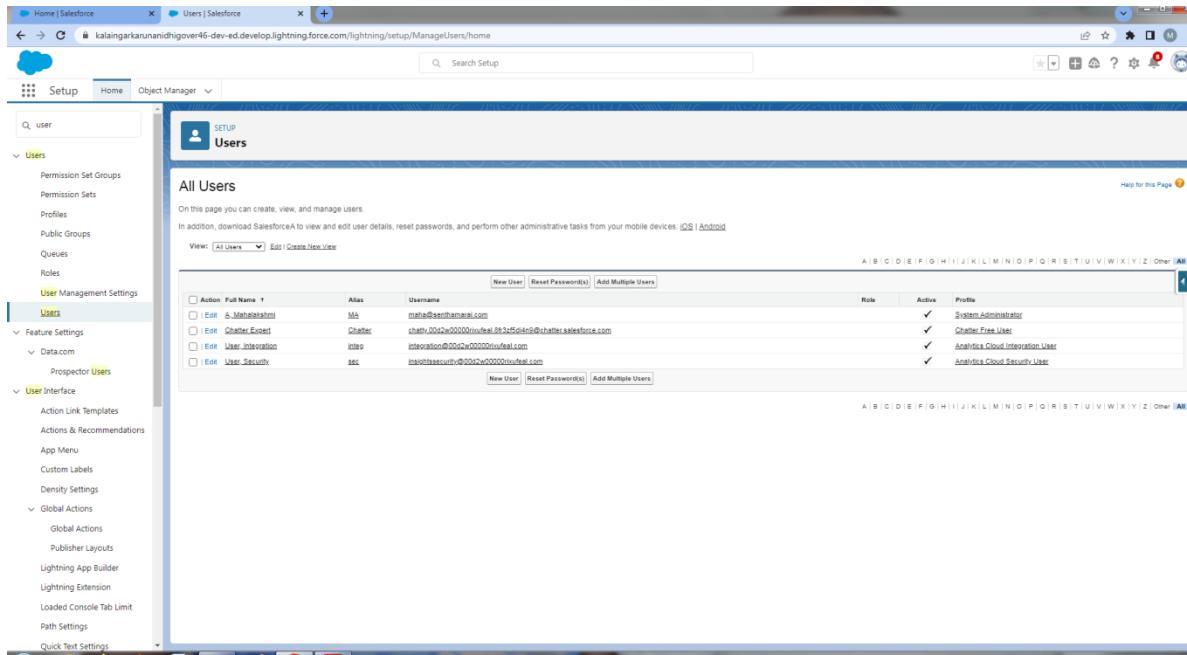


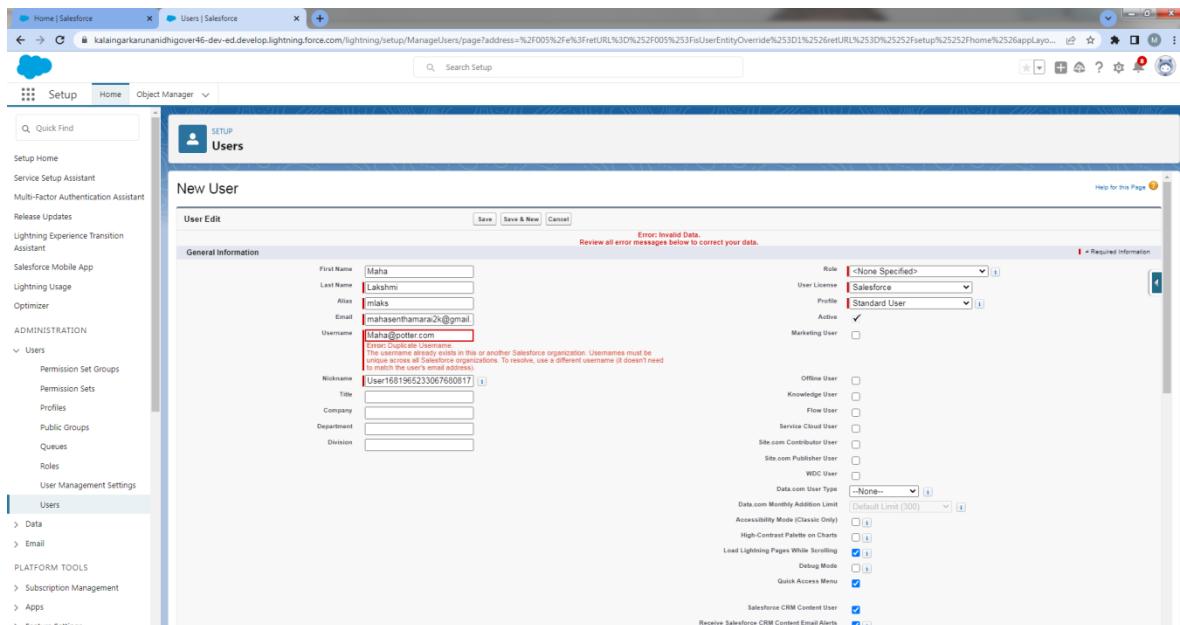
Milestone-5

Project Report Template



Milestone-6





New User

User Edit

General Information

Error: Invalid Data. Review all error messages below to correct your data.

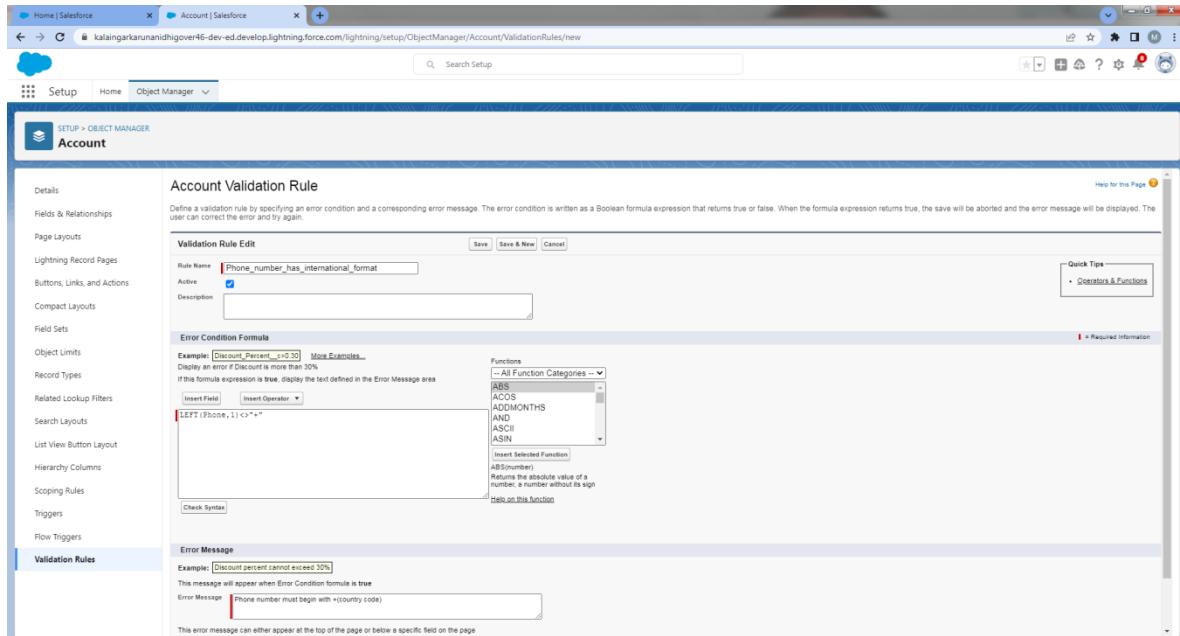
First Name: Maha
Last Name: Lakshmi
Alias: miks
Email: mahasentharamai2@gmail.com
Username: Maha@dotter.com (highlighted in red)
Nickname: User1681965233067680017
Title:
Company:
Department:
Division:

Role: <None Specified>
User License: Salesforce
Profile: Standard User
Active:
Marketing User:

Offline User:
Knowledge User:
Flow User:
Service Cloud User:
Site.com Contributor User:
Site.com Publisher User:
WCC User:

Data.com User Type: <None>
Data.com Monthly Addition Limit: Default Limit (100)
Accessibility Mode (Classic Only):
High-Contrast Palette on Change:
Lead Lightning Pages While Scrolling:
Debug Mode:
Quick Access Menu:
Salesforce CRM Content User:
Receive Salesforce CRM Content Email Alerts:

Milestone-7



Account Validation Rule

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Hierarchy Columns
Scoping Rules
Triggers
Flow Triggers
Validation Rules

Validation Rule Edit

Validation Rule Name: Phone_number_has_international_format
Active:
Description:

Error Condition Formula

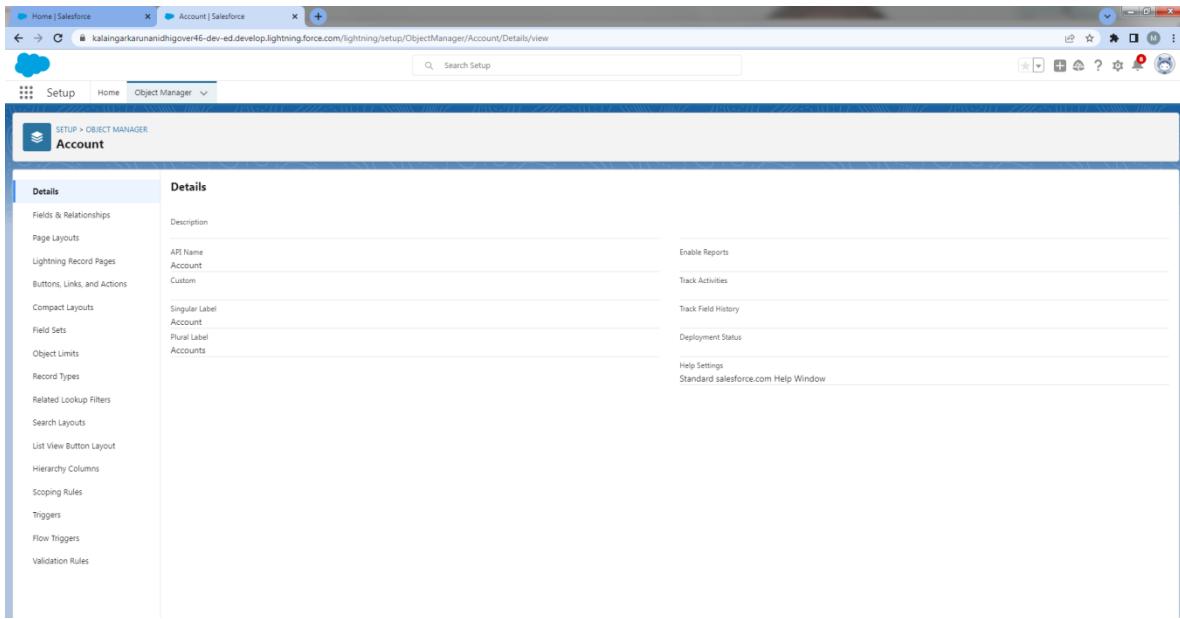
Example: Discount_Percent <> 0.50 More Examples...
Display an error if Discount is more than 30%
If this formula expression is true, display the text defined in the Error Message area

Functions: All Function Categories
ABS
ACOS
ADDMONTHS
BIN
ASCII
ASIN
Insert Field
Insert Operator
LEFT(Phone, 1) <> "+"
Check Syntax
Help on this Function

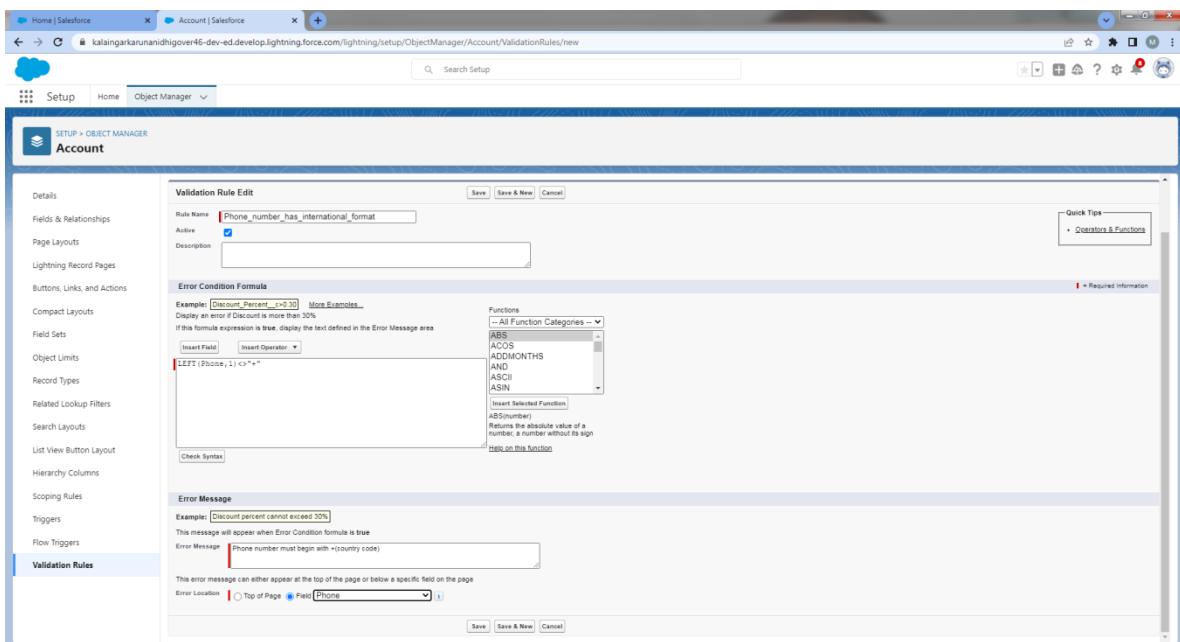
Error Message

Example: Discount percent cannot exceed 30%
This message will appear when Error Condition formula is true
Error Message: Phone number must begin with +country code

Project Report Template

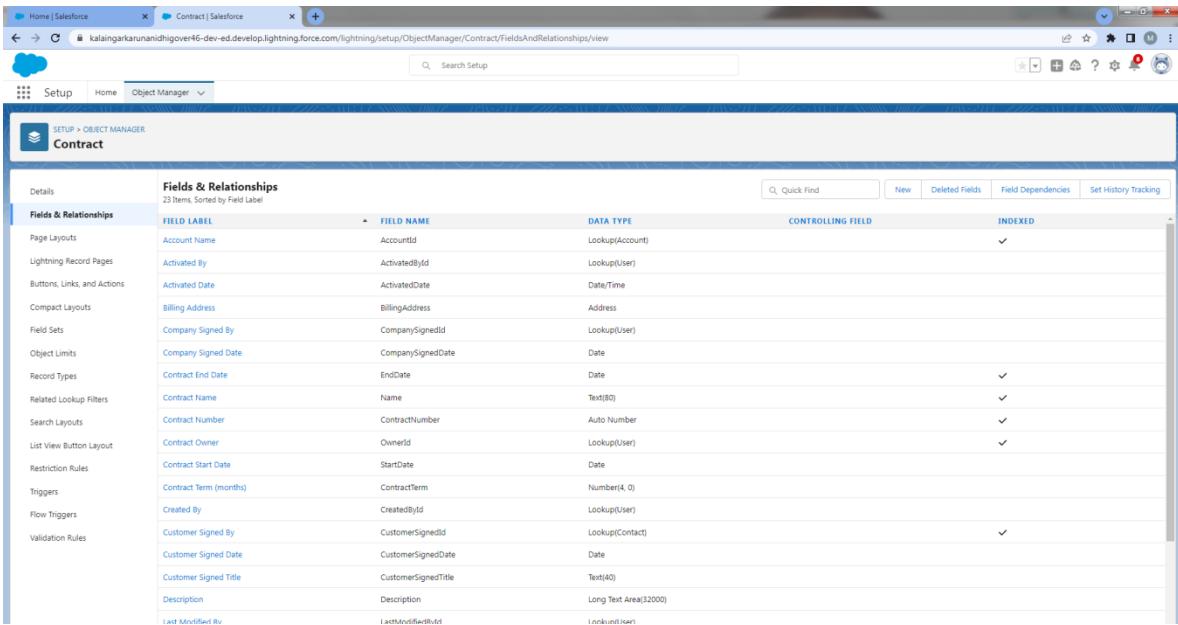


This screenshot shows the Salesforce Object Manager interface for the 'Account' object. The left sidebar lists various configuration tabs: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Hierarchy Columns, Scoping Rules, Triggers, Flow Triggers, and Validation Rules. The main pane displays the 'Details' tab for the 'Account' object, which includes fields for Description, API Name (Account), Singular Label (Account), Plural Label (Accounts), Enable Reports, Track Activities, Track Field History, Deployment Status, Help Settings, and Standard salesforce.com Help Window.

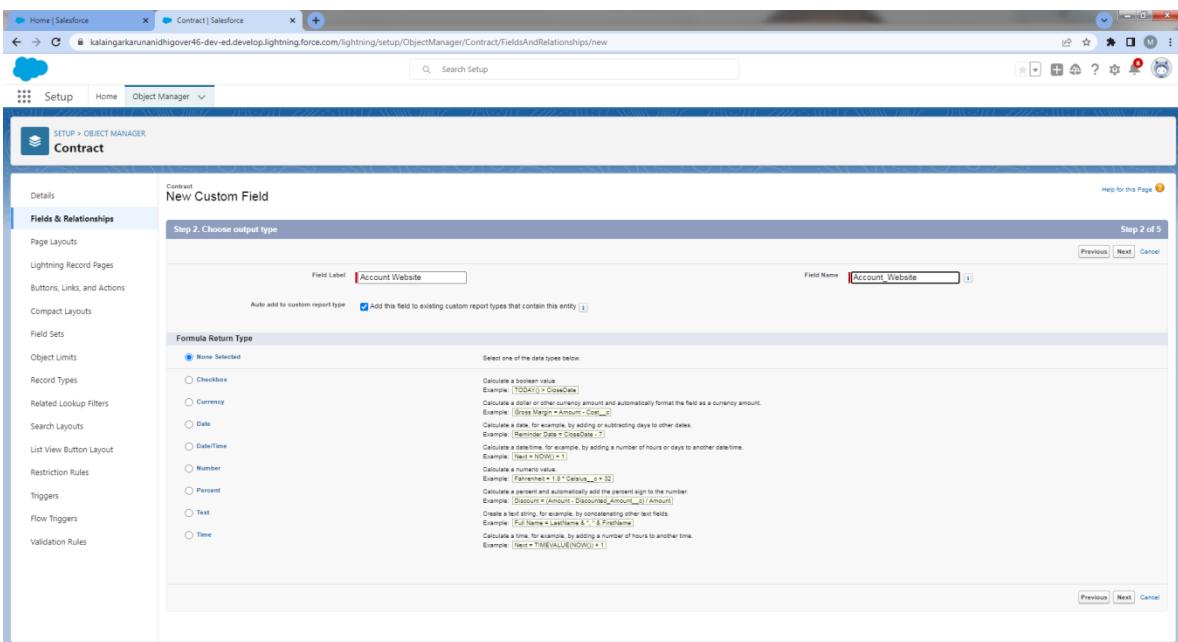


This screenshot shows the 'Validation Rule Edit' screen for the 'Account' object. The left sidebar shows the 'Validation Rules' tab is selected. The main area contains fields for Rule Name ('Phone_number_has_international_format'), Active status (checked), and Description. The 'Error Condition Formula' section contains the formula 'LEFT(Phone,1) <> "+"'. A dropdown menu for functions is open, showing options like ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN, etc. The 'Error Message' section contains the message 'Phone number must begin with +<country code>'. The 'Save' and 'Save & New' buttons are at the bottom.

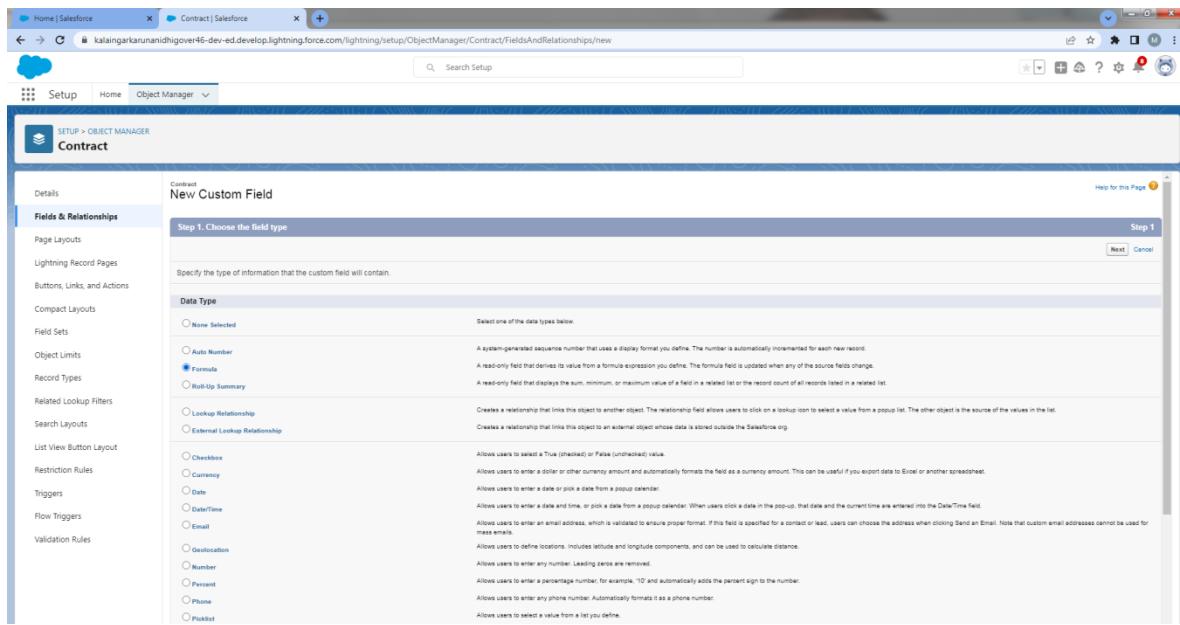
Project Report Template



The screenshot shows the Salesforce Object Manager interface for the 'Contract' object. The left sidebar lists various setup categories like Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, etc. The main content area is titled 'Fields & Relationships' and displays a table of 23 items, sorted by Field Label. The columns include FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. Key fields listed include Account Name (AccountID), Activated By (ActivatedByID), Activated Date (ActivatedDate), Billing Address (BillingAddress), Company Signed By (CompanySignedID), Company Signed Date (CompanySignedDate), Contract End Date (EndDate), Contract Name (Name), Contract Number (ContractNumber), Contract Owner (OwnerId), Contract Start Date (StartDate), Contract Term (months) (ContractTerm), Created By (CreatedByID), Customer Signed By (CustomerSignedID), Customer Signed Date (CustomerSignedDate), Customer Signed Title (CustomerSignedTitle), Description (Description), and Last Modified By (LastModifiedByID).



The screenshot shows the 'New Custom Field' creation wizard for the 'Contract' object. The top navigation bar includes 'Setup > OBJECT MANAGER' and 'Contract'. The left sidebar lists setup categories. The main form is titled 'Contract New Custom Field' and is on 'Step 2. Choose output type'. It shows 'Field Label' set to 'Account Website' and 'Field Name' set to 'Account_Website'. A checkbox 'Add this field to existing custom report types that contain this entity' is checked. Below this, the 'Formula Return Type' section is visible, with 'None Selected' selected. Other options include Checkbox, Currency, Date, Date/Time, Number, Percent, Text, and Time. Each option has a brief description and example formula. The bottom right of the form shows 'Step 2 of 5' with 'Previous', 'Next', and 'Cancel' buttons.



Contract New Custom Field

Step 1. Choose the field type

Specify the type of information that the custom field will contain.

Data Type

Formula

Select one of the data types below.

A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Creates a relationship that links this object to another object. The Relationship field allows users to click on a lookup icon to select a value from a pop-up list. The other object is the source of the values in the list.

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Allows users to select a True (checked) or False (unchecked) value.

Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Allows users to enter a date or pick a date from a pop-up calendar.

Allows users to enter a date and time, or pick a date from a pop-up calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.

Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

Allows users to define locations, includes latitude and longitude components, and can be used to calculate distance.

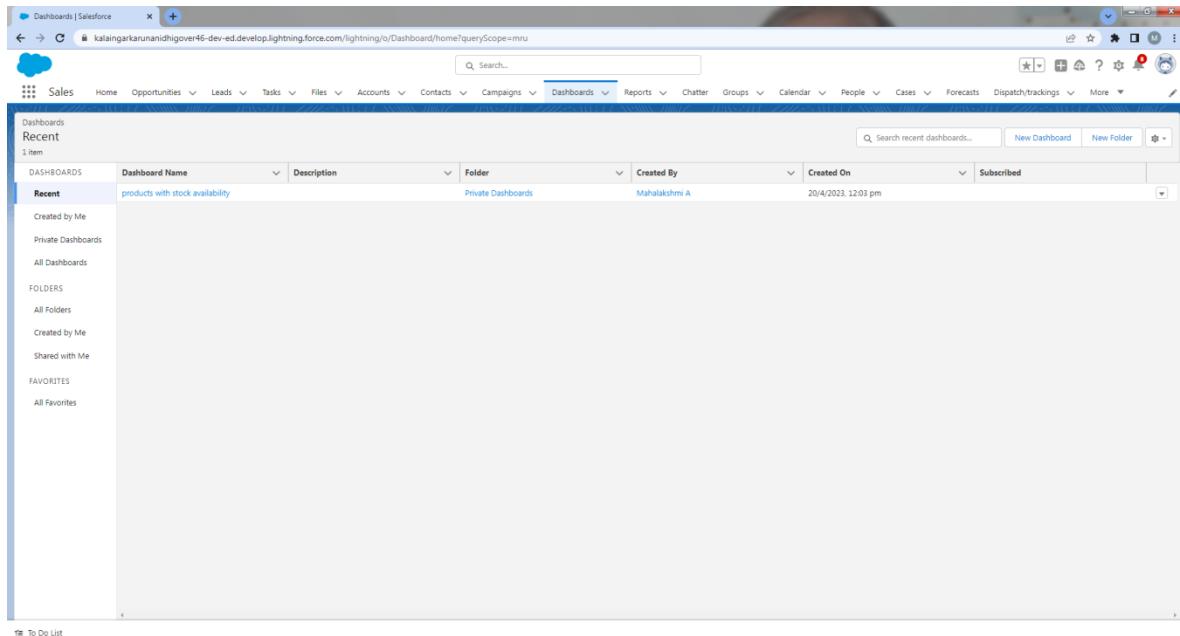
Allows users to enter any number. Leading zeros are removed.

Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.

Allows users to enter any phone number. Automatically formats it as a phone number.

Allows users to select a value from a list you define.

Milestone-7 Reports



DASHBOARD	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	products with stock availability		Private Dashboards	Mahalakshmi A	20/4/2023, 12:03 pm	

Dashboards

Recent

1 item

DASHBOARDS

- Recent
- Created by Me
- Private Dashboards
- All Dashboards

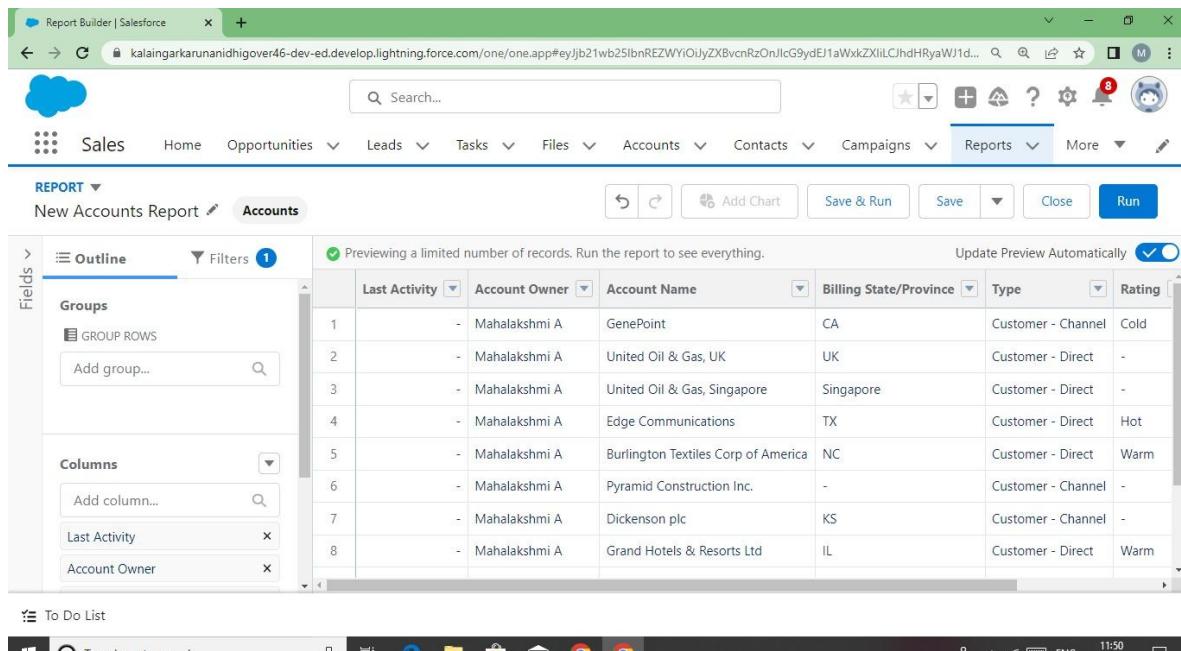
FOLDERS

- All Folders
- Created by Me
- Shared with Me

FAVORITES

- All Favorites

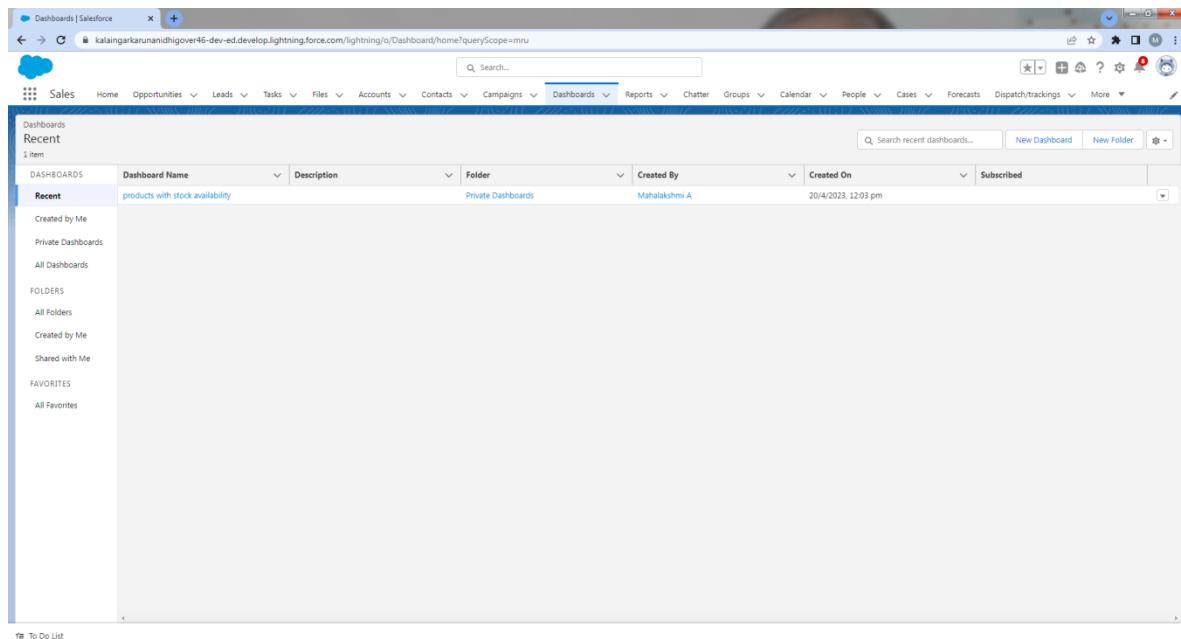
Project Report Template



The screenshot shows the Salesforce Report Builder interface. The title bar says "Report Builder | Salesforce". The main area is titled "REPORT" and "New Accounts Report". The navigation bar includes Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Reports, and More. The report preview shows a table with columns: Last Activity, Account Owner, Account Name, Billing State/Province, Type, and Rating. The table contains 8 rows of account data.

	Last Activity	Account Owner	Account Name	Billing State/Province	Type	Rating
1	-	Mahalakshmi A	GenePoint	CA	Customer - Channel	Cold
2	-	Mahalakshmi A	United Oil & Gas, UK	UK	Customer - Direct	-
3	-	Mahalakshmi A	United Oil & Gas, Singapore	Singapore	Customer - Direct	-
4	-	Mahalakshmi A	Edge Communications	TX	Customer - Direct	Hot
5	-	Mahalakshmi A	Burlington Textiles Corp of America	NC	Customer - Direct	Warm
6	-	Mahalakshmi A	Pyramid Construction Inc.	-	Customer - Channel	-
7	-	Mahalakshmi A	Dickenson plc	KS	Customer - Channel	-
8	-	Mahalakshmi A	Grand Hotels & Resorts Ltd	IL	Customer - Direct	Warm

Milestone-8



The screenshot shows the Salesforce Dashboards page. The title bar says "Dashboards | Salesforce". The main area lists "Recent" dashboards. The table columns are: Dashboard Name, Description, Folder, Created By, Created On, and Subscribed. There is one item listed: "products with stock availability" created by Mahalakshmi A on 20/4/2023, 12:03 pm.

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	products with stock availability		Private Dashboards	Mahalakshmi A	20/4/2023, 12:03 pm	

Project Report Template

Sales Home Opportunities Leads Tasks Files Accounts Contacts Dashboards More

product with stock availability

Last Name	First Name	Account Name	Billing City	Type
- Mahalakshmi A	GenePoint	CA	Customer	
- Mahalakshmi A	United Oil & Gas, UK	UK	Customer	
- Mahalakshmi A	United Oil & Gas, Singapore	Singapore	Customer	

+ Component + Filter Save Done

[View Report \(Product with stock availability\)](#)

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar People Cases Forecasts Dispatch/trackings More

products with stock availability

Add Component

Report: products with stock availability

Use chart settings from report

Display As:

Groups: Add group...

Columns: Add column...

Warehouse: Warehouse Name:

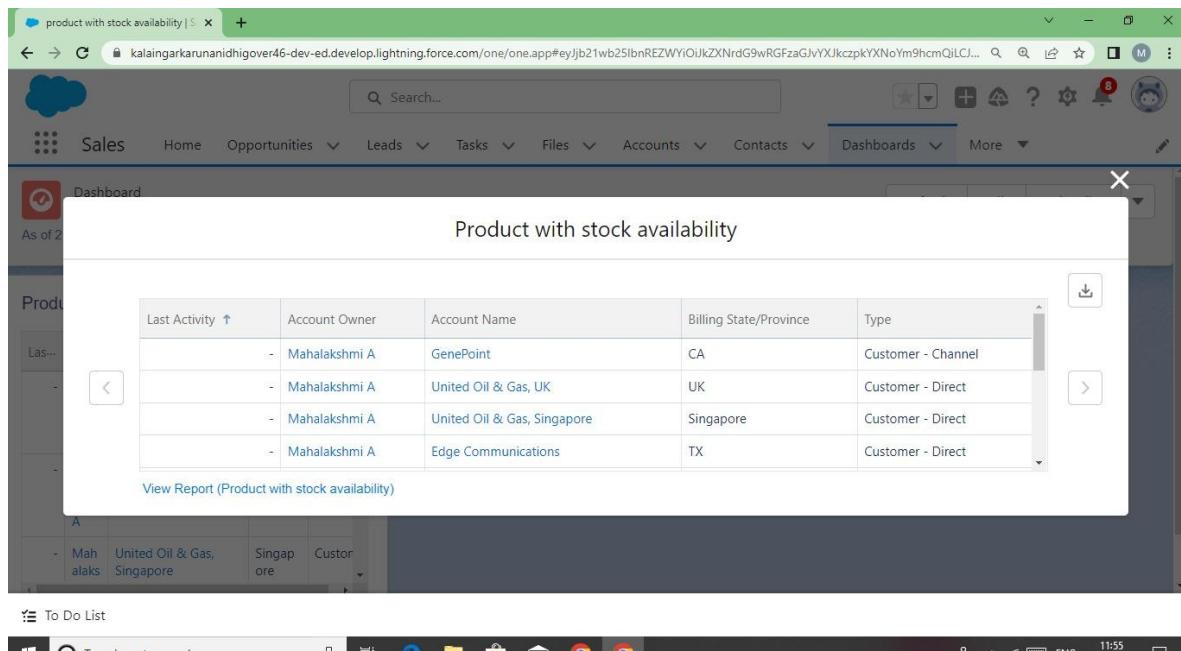
Sort By: Warehouse: Warehouse Name

Display Units

Preview: products with stock availability

We can't draw this chart because there is no data.

[View Report \(products with stock availability\)](#)



The screenshot shows a Salesforce report titled "Product with stock availability". The report displays a list of accounts, each with the following columns: Last Activity, Account Owner, Account Name, Billing State/Province, and Type. The data is as follows:

Last Activity	Account Owner	Account Name	Billing State/Province	Type
-	Mahalakshmi A	GenePoint	CA	Customer - Channel
-	Mahalakshmi A	United Oil & Gas, UK	UK	Customer - Direct
-	Mahalakshmi A	United Oil & Gas, Singapore	Singapore	Customer - Direct
-	Mahalakshmi A	Edge Communications	TX	Customer - Direct

4 Trailhead Profile Public URL

Team Lead – A.Mahalakshmi

<https://trailblazer.me/id/msenthamarai>

Team Member 1 – K.Madhumitha

<https://trailblazer.me/id/mmadhumitha3>

Team Member 2 – R.Nagalakshmi

<http://trailblazer.me/id/nagar527>

Team Member 3 – G.Narmatha Sri

<http://trailblazer.me/id/nasri50>

5 ADVANTAGES & DISADVANTAGE

Advantages:

- Easy Shopping Experience.
- Customer Engagement
- Personalization
- Instant Gratification
- Greater Inventory Options
- Targeted Discounts

Disadvantages:

One of the biggest disadvantages is the long hours. Retail management can be a very demanding job and require long working hours. Another disadvantage is dealing with difficult customers. Some customers can be very demanding and challenging to deal with.

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.

7 CONCLUSION

Retail management refers to the process of helping customers find products in your store. It includes everything from increasing your customer pool to how products are presented, and how you fulfill a customer's needs. A good store manager helps customers leave the store with a smile.

8 FUTURE SCOPE

Retail marketing encompasses all of the ways a consumer business attracts customers and generates sales of its goods and services.