

## **Project Report Template**

### **TITLE: RETAIL MANAGEMENT APPLICATION USING SALESFORCE**

## **1. INTRODUCTION**

### **1.1.Overview**

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.

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. They also are responsible for:

- Motivating Employees
- Developing strategies to increase the customer pool
- Growing store traffic
- Meeting sales goals
- Ensuring customer satisfaction
- Improving profitability
- Preventing shoplifting

### **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


Template



## Empathy map

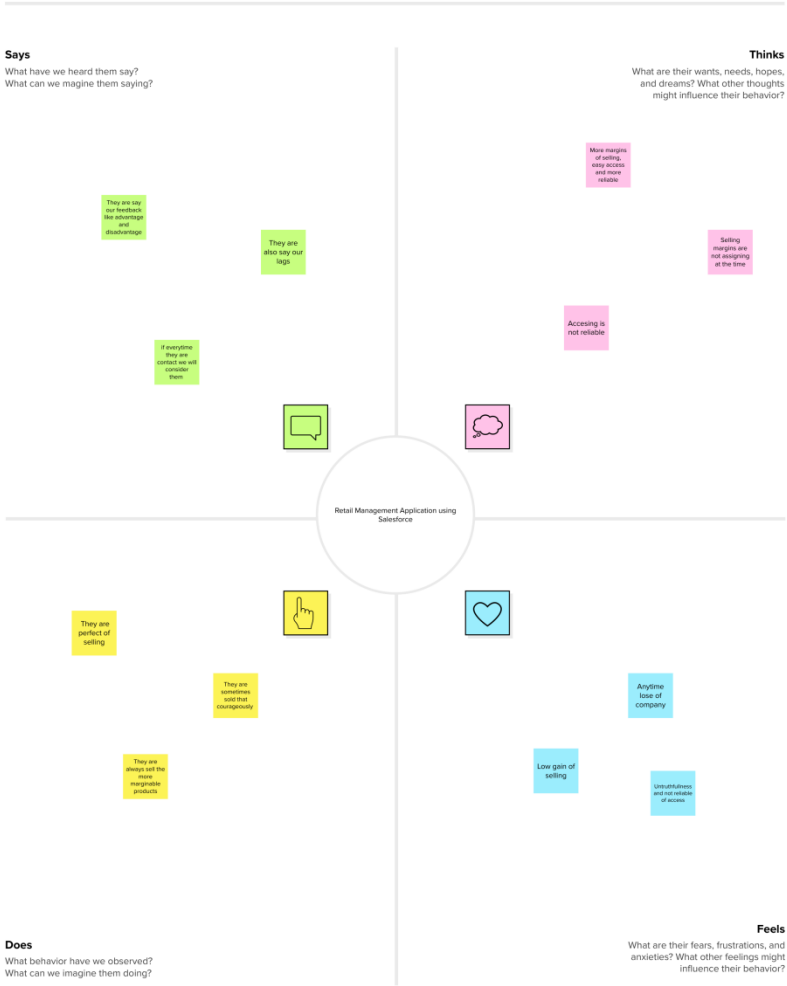
Use this framework to develop a deep, shared understanding and empathy for other people. An empathy map helps describe the aspects of a user's experience, needs and pain points, to quickly understand your users' experience and mindset.

[Share template feedback](#)



### Build empathy

The information you add here should be representative of the observations and research you've done about your users.



**Says**  
What have we heard them say?  
What can we imagine them saying?


**Thinks**  
What are their wants, needs, hopes, and dreams? What other thoughts might influence their behavior?

**Does**  
What behavior have we observed?  
What can we imagine them doing?

**Feels**  
What are their fears, frustrations, and anxieties? What other feelings might influence their behavior?


Observations and research notes:

- They are our feedback like encourage and discourage
- They are also very our tags
- If everyone they are correct we will consider them
- They are perfect of selling
- They are always sell the most appropriate products
- They are sometimes used that inappropriate
- More margins of selling, only access and more reliable
- Selling margins are not emerging at the time
- Accessing is not reliable
- Anytime lose of company
- Low gain of selling
- Specialization and our relation of service

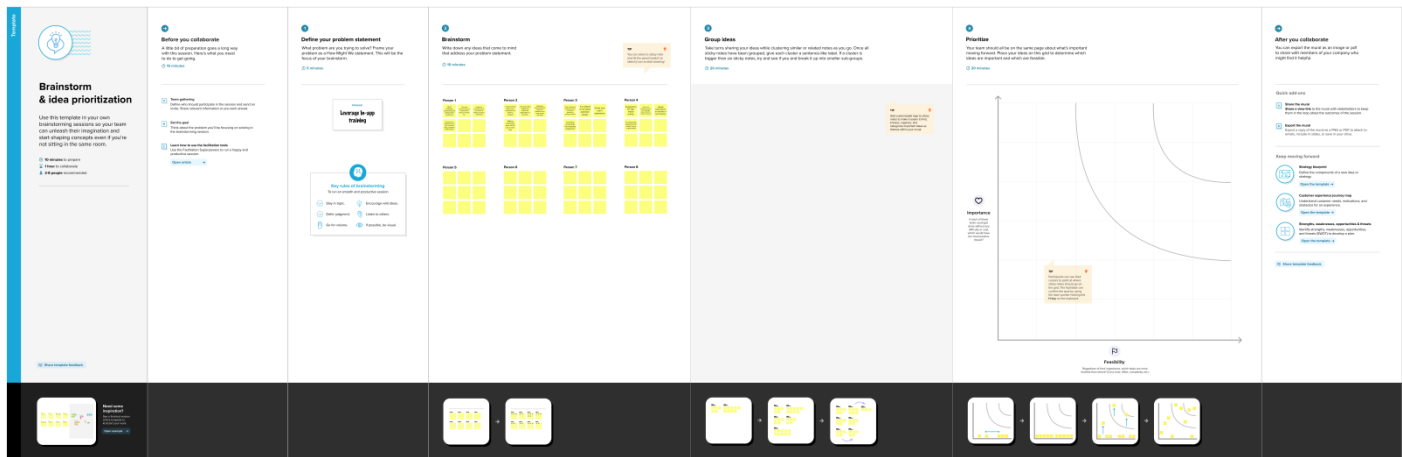


**Need some inspiration?**  
See a finished version of this template to kickstart your work.

[Open example](#)



## 2.2 Ideation & Brainstorming Map



## 3. RESULT

### 3.1 Data Model:

Object Name	Field in the Object	
Warehouset	Field Label	Data Type
	Warehouset Name	Text(80)
Contact	Field Label	Data Type
	Contact Name	Text(80)
Lead	Field Label	Data Type
	Lead Name	Text(80)

Display/Tracking	<table><tr><th>Field Label</th><th>Data Type</th></tr><tr><td>Disapatched</td><td>Checkbox</td></tr><tr><td>Expexted date of delivery</td><td>Date</td></tr><tr><td>Retail</td><td>Master detail</td></tr><tr><td>Tracking ID</td><td>Text(80)</td></tr></table>	Field Label	Data Type	Disapatched	Checkbox	Expexted date of delivery	Date	Retail	Master detail	Tracking ID	Text(80)
	Field Label	Data Type									
	Disapatched	Checkbox									
	Expexted date of delivery	Date									
	Retail	Master detail									
Tracking ID	Text(80)										
Retail	<table><tr><th>Field Label</th><th>Data Type</th></tr><tr><td>Retail Name</td><td>Text(80)</td></tr></table>	Field Label	Data Type	Retail Name	Text(80)						
Field Label	Data Type										
Retail Name	Text(80)										

## 3.2 Activity & Screenshot :

### Object Creation :

#### 1.Warehouset

The screenshot shows the Salesforce Object Manager interface for the 'Warehouse' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), 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, and Restriction Rules. The main content area is titled 'Fields & Relationships' and shows 4 items, sorted by Field Label. The table below lists the fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Warehouse Name	Name	Text(80)		✓

## 2.Contact

contact | Salesforce x Retail\_Management\_Application x New Tab

rsgc-b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000004GgzE/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

**contact**

Details

**Fields & Relationships**

4 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
contact Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

## 3.Display/tracking

Display/tracking | Salesforce x Retail\_Management\_Application x New Tab

rsgc-b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000004Gg5L/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

**Display/tracking**

Details

**Fields & Relationships**

6 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Dispatched	Dispatched__c	Checkbox		
Expected date of delivery	Expected_date_of_delivery__c	Date		
Last Modified By	LastModifiedById	Lookup(User)		
Retail	Retail__c	Master-Detail(Retail)		✓
Tracking ID	Name	Text(80)		✓

4.Lead

Lead | Salesforce

Retail\_Management\_Application\_

New Tab

↩

→

↻

rsgc-b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000004Ggzl/FieldsAndRelationships/view

🔍

Search Setup

★

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⚙️

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👤

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Lead

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

4 Items, Sorted by Field Label

🔍 Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Lead Name	Name	Text(80)		✓
Owner	OwnerId	Lookup(User,Group)		✓

5.RETAIL

Retail | Salesforce

Retail\_Management\_Application\_

New Tab

↩

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rsgc-b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000004Ggu9/FieldsAndRelationships/view

🔍

Search Setup

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👤

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Retail

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

4 Items, Sorted by Field Label

🔍 Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Retail Name	Name	Text(80)		✓

TABS :

Tabs | Salesforce

Custom Tabs ~ Salesforce - Deve

Retail\_Management\_Application

New Tab

← → ↻

rsgc-b-dev-ed.develop.my.salesforce.com/setup/ui/customtabs.jsp?setupid=CustomTabs&appLayout=setup&noS1Redirect=true

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salesforce

23

Search...

Search

Switch to Lightning Experience

Yuvaraj P

Setup

Help

Content

Home

Chatter

Libraries

Content

Subscriptions

Display/trackings

Warehousesets

contacts

Leads

+

It's Better in Lightning

Move to Lightning Experience and give your users a productivity boost.

Tell Me More

Check Readiness

Quick Find / Search...

Expand All | Collapse All

Lightning Experience Transition Assistant

Move to the new, more productive Salesforce.

Get Started

Salesforce Mobile Quick Start

Home

Administer

Release Updates

Manage Users

Manage Apps

Custom Tabs

Help for this Page

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs

New

What Is This?

Action	Label	Tab Style	Description
<a href="#">Edit</a>   <a href="#">Del</a>	contacts	Bell	
<a href="#">Edit</a>   <a href="#">Del</a>	Display/trackings	Bank	
<a href="#">Edit</a>   <a href="#">Del</a>	Leads	Chalkboard	
<a href="#">Edit</a>   <a href="#">Del</a>	Warehousesets	Books	

Web Tabs

New

What Is This?

No Web Tabs have been defined

USERS :

Users | Salesforce

All Users ~ Salesforce - Deve

Manage Users : Developer Ed

Retail\_Management\_Application

New Tab

← → ↻

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

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salesforce

23

Search...

Search

Switch to Lightning Experience

Yuvaraj P

Setup

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Home

Administer

Release Updates

Manage Users

Users

All Users

Help for this Page

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

<input type="checkbox"/> Action	Full Name +	Alias	Username	Role	Active	Profile
<input type="checkbox"/> <a href="#">Edit</a>	Chatter Expert	Chatter	chatty.00d2w00000rqrr4eaj.2ytisedikuno@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> <a href="#">Edit</a>	P.Yuvaraj	YP	yuvaraj@stat.com		✓	System Administrator
<input type="checkbox"/> <a href="#">Edit</a>	User_Integration	integ	integration@00d2w00000rqrr4eaj.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> <a href="#">Edit</a>	User_Security	sec	insightsecurity@00d2w00000rqrr4eaj.com		✓	Analytics Cloud Security User
<input type="checkbox"/> <a href="#">Edit</a>	Yuvaraj	no	ragavan@stat.com	CEO	✓	Partner App Subscription 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

## Application :

The screenshot shows the Salesforce Lightning App Builder interface. The top navigation bar includes 'Lightning App Builder', 'App Settings', 'Pages', and 'Sales app'. The left sidebar lists 'App Settings' with sub-items: 'App Details & Branding' (selected), 'App Options', 'Utility Items (Desktop Only)', 'Navigation Items', and 'User Profiles'.

The main content area is titled 'App Details & Branding' and contains the following sections:

- App Details:**
  - \* App Name:** Sales app
  - \* Developer Name:** Sales\_app
  - Description:** Enter a description...
- App Branding:**
  - Image:** A placeholder box with an 'Upload' button.
  - Primary Color Hex Value:** #35D7F4
  - Org Theme Options:** ☐ Use the app's image and color instead of the org's custom theme
- App Launcher Preview:** A preview of the app launcher showing a blue square with 'Sa' and the text 'Sales app'.

## Validation Rule :

The screenshot shows a Microsoft Word document titled 'Project Report - Yuvaraj P (Last saved by user) - Microsoft Word'. The document is in the 'Page Layout' view. The 'App Details & Branding' settings from the previous screenshot are embedded within the document, showing the same configuration for the 'Sales app'.

The document's status bar at the bottom indicates 'Page: 6 of 9', 'Words: 402', and 'English (India)'.



## Reports :

The screenshot displays the Salesforce Reports page. The top navigation bar includes the Salesforce logo, a search bar, and various utility icons. The main navigation menu on the left lists Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports (selected), Chatter, Groups, and More. The Reports section is active, showing a sub-header 'Private Reports' with a search bar and buttons for 'New Report' and 'New Folder'. A table lists reports, with one report visible: 'New Warehouses Report' by 'Yuvaraj P' created on '6/4/2023, 10:39 pm'. The left sidebar shows a list of report categories: REPORTS (Recent, Created by Me, Private Reports (selected), Public Reports, All Reports), FOLDERS (All Folders, Created by Me, Shared with Me), and FAVORITES (All Favorites).

Reports | Salesforce

All Users ~ Salesforce - Dev... | Home | Salesforce | Retail\_Management\_Applic... | New Tab

rsgc-b-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mine

Search...

Star, Plus, Cloud, Help, Settings, Bell, Profile

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

Reports

Private Reports

Search private reports... New Report New Folder

1 item

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Warehouses Report		Private Reports	Yuvaraj P	6/4/2023, 10:39 pm	

Created by Me

Private Reports

Public Reports

All Reports

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

To Do List

## Dashboards :

The screenshot displays a Salesforce Lightning Developer interface. At the top, several browser tabs are open, including 'Retail | Salesforce', 'All Users ~ Salesforce - Developer', 'Home | Salesforce', 'Retail\_Management\_Application', and 'New Tab'. The address bar shows the URL 'rsgc-b-dev-ed.develop.lightning.force.com/lightning/r/Dashboard/01Z2w00000fBtoEAE/view'. The Salesforce navigation bar is visible, featuring a search bar and a menu with options like Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, and More. The main content area shows a custom dashboard titled 'Retail' with the subtitle 'Viewing as Yuvaraj P'. The dashboard is currently empty, displaying the message 'This dashboard has no components.' The dashboard header includes buttons for 'Refresh', 'Edit', and 'Subscribe'.

#### 4. Trailhead Profile Public URL :

Team Lead – YUVARAJ P - <https://trailblazer.me/id/pyuvaraj113>

Team Member 1 – RAGAVAN S- <https://trailblazer.me/id/ralex122>

Team Member 2 – BHARATHI P- <https://trailblazer.me/id/hgahlot3>

Team Member3 – ABINESH M - <https://trailblazer.me/id/mabinesh123>

#### 5. ADVANTAGES & DISADVANTAGE :

##### Advantages:

###### Optimises all store processes:

A company can increase the efficiency of each process and better ensure a high-quality standard for employees.

As a result, executives may accomplish their goals at faster rates.

##### Disadvantages:

- Difficult to Sell To
- Lower Profit Margin
- Impersonal
- Competition

#### 6. APPLICATIONS:

IT helps to store customer data, which the retailer can then use to reach out to customers.

#### 7. CONCLUSION:

we have explored the meaning of the terms retailing, marketing and marketing communications.

#### 8. FUTURE SCOPES:

The future of retail will feature **a high level of online penetration.**