

## **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

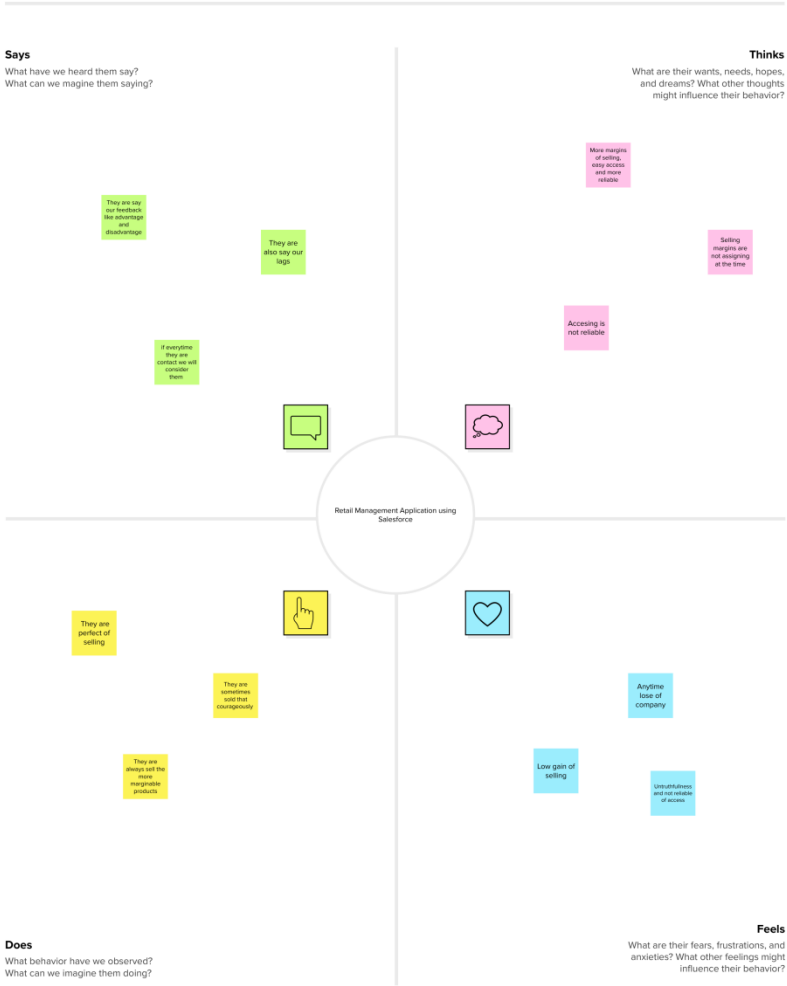
Use this framework to develop a deep, shared understanding and empathy for other people. An empathy map helps describe the aspects of a user's experience, needs and pain points, to quickly understand your users' experience and mindset.


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### Build empathy


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



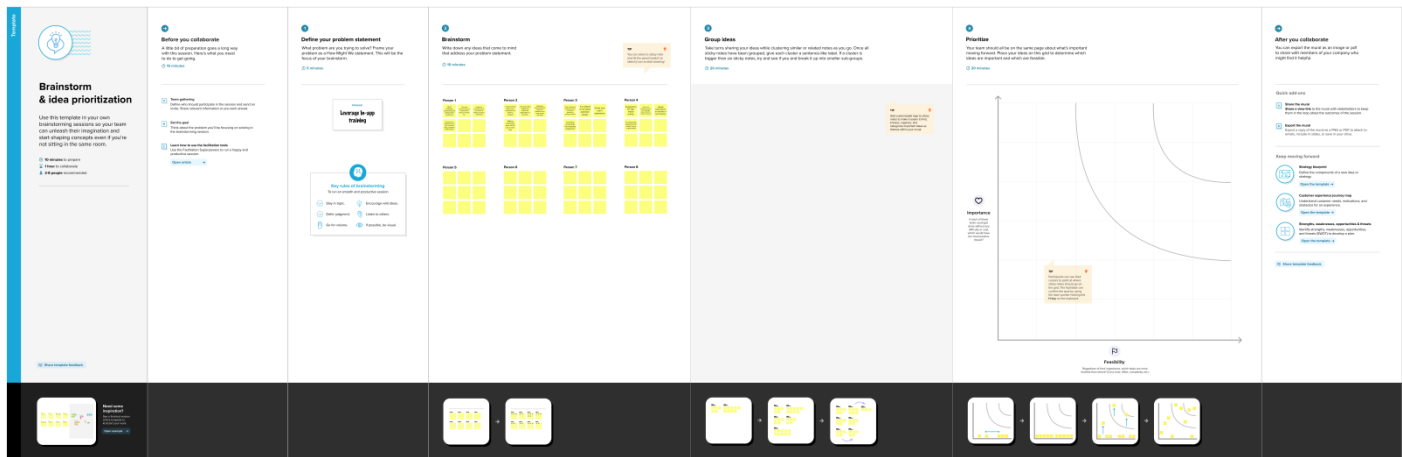


**Need some inspiration?**  
See a finished version of this template to kickstart your work.

[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 'Fields & Relationships' section is active, displaying a list of 4 items sorted by Field Label. The table below represents the data shown in the screenshot.

| 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 x +

← → ↻ 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 x +

← → ↻ 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

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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

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 |
|------------------|------------------|--------------------|-------------------|---------|
| 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

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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

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🔍 Quick Find

New

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| 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 :

The screenshot shows the Salesforce Custom Tabs configuration page. The left sidebar contains navigation links: Home, Chatter, Libraries, Content, Subscriptions, Display/trackings, Warehouses, contacts, Leads, and a plus icon. Below these are sections for 'Lightning Experience Transition Assistant', 'Salesforce Mobile Quick Start', 'Home', and 'Administer' (with links for Release Updates, Manage Users, and Manage Apps). The main content area is titled 'Custom Tabs' and includes a 'Help for this Page' link. It explains that custom tabs can extend Salesforce functionality or build new application functionality. Below this, there are two sections: 'Custom Object Tabs' and 'Web Tabs'. The 'Custom Object Tabs' section has a table with columns: Action, Label, Tab Style, and Description. It lists four tabs: 'contacts' (Bell style), 'Display/trackings' (Bank style), 'Leads' (Chalkboard style), and 'Warehouses' (Books style). The 'Web Tabs' section indicates that no web tabs have been defined.

| 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> | Warehouses        | Books      |             |

| Action                        | Label | Tab Style | Description |
|-------------------------------|-------|-----------|-------------|
| No Web Tabs have been defined |       |           |             |

## USERS :

The screenshot shows the Salesforce 'All Users' page. The left sidebar is identical to the previous screenshot. The main content area is titled 'All Users' and includes a 'Help for this Page' link. It explains that on this page, users can create, view, and manage users. It also mentions that users can download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from their mobile devices. Below this, there is a 'View' dropdown set to 'All Users' and links for 'Edit' and 'Create New View'. A table lists the current users with columns: Action, Full Name, Alias, Username, Role, Active, and Profile. The table includes buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users' at the top and bottom. The user list includes: Chatter Expert (Chatter role), P. Yuvaraj (YP alias, System Administrator profile), User Integration (integration@00d2w00000rqr4eaj.com, Analytics Cloud Integration User profile), User Security (sec alias, Analytics Cloud Security User profile), and Yuvaraj (no alias, CEO role, Partner App Subscription User profile).

| Action               | Full Name        | Alias   | Username   | Role | Active | Profile                          |
|----------------------|------------------|---------|--|------|--------|----------------------------------|
| <a href="#">Edit</a> | Chatter Expert   | Chatter | chatty.00d2w00000rqr4eaj.2ytisedikuno@chatter.salesforce.com |      | ✓      | Chatter Free User                |
| <a href="#">Edit</a> | P. Yuvaraj       | YP      | yuvaraj@stat.com   |      | ✓      | System Administrator             |
| <a href="#">Edit</a> | User Integration | integ   | integration@00d2w00000rqr4eaj.com                            |      | ✓      | Analytics Cloud Integration User |
| <a href="#">Edit</a> | User Security    | sec     | insightsecurity@00d2w00000rqr4eaj.com                        |      | ✓      | Analytics Cloud Security User    |
| <a href="#">Edit</a> | Yuvaraj          | no      | ragavan@stat.com   | CEO  | ✓      | Partner App Subscription User    |

## 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 :

Reports | Salesforce

All Users ~ Salesforce - Deve

Home | Salesforce

Retail\_Management\_Applica

New Tab

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

Search...

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Sales

Home

Opportunities

Leads

Tasks

Files

Accounts

Contacts

Campaigns

Dashboards

Reports

Chatter

Groups

More

Reports

Private Reports

1 item

Search private reports...

New Report

New Folder

⚙️

| 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 :

Retail | Salesforce

All Users ~ Salesforce - Deve

Home | Salesforce

Retail\_Management\_Applica

New Tab

rsgc-b-dev-ed.develop.lightning.force.com/lightning/r/Dashboard/01Z2w000000fBtoEAE/view

Search...

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Sales

Home

Opportunities

Leads

Tasks

Files

Accounts

Contacts

Campaigns

Dashboards

Reports

Chatter

Groups

More

Dashboard

Retail

Viewing as Yuvaraj P

Refresh

Edit

Subscribe

▼

This dashboard has no components.

To Do List

#### 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/bharp81>

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.**