

PROJECT REPORT TEMPLATE

1 INTRODUCTION

1.1 Overview

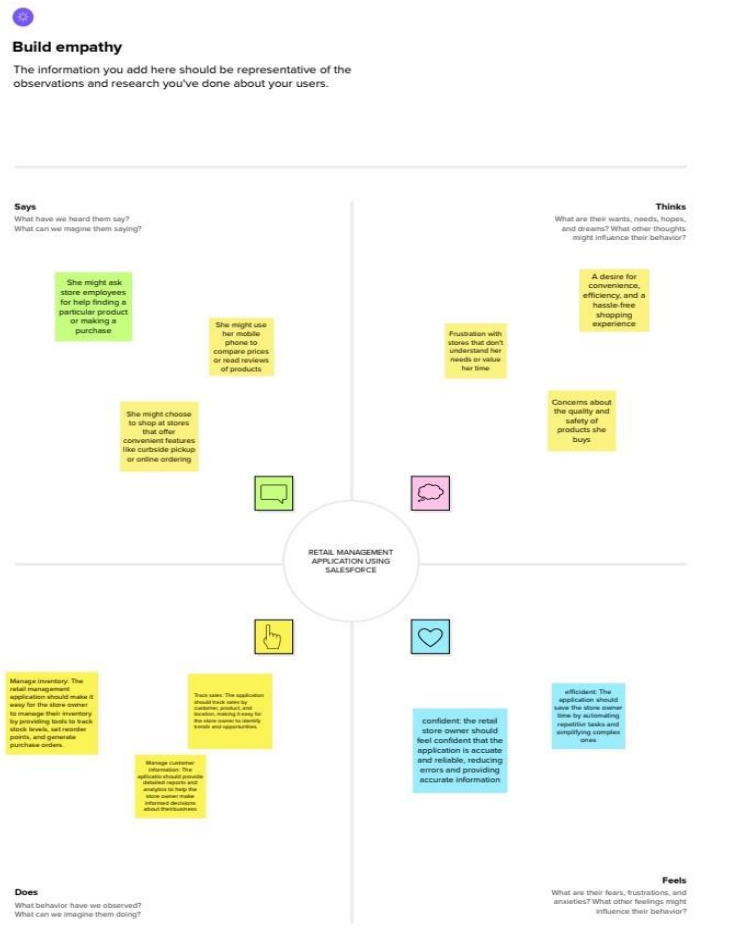
Are you new to salesforce ? not sure exactly what it is, or how to use it? Don't know where you should start on your learning journey? If you've answered yes to any of these questions, then you're in the right place. This module is for you. Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module, we'll take you through these features and answer the question, "What is Salesforce, anyway?"

1.2 Purpose

Salesforce can be used to manage orders from retail stores and distributors, including tracking orders, processing payments and managing inventory levels.

2 PROBLEM DEFINITION & DESIGN THINKING

2.1 Empathy Map



2.2 Ideation & Brainstroming Map

2

Brainstorm

Write down any ideas that come to mind that address your problem statement.

🕒 10 minutes

TIP

You can select a sticky note and hit the pencil [switch to sketch] icon to start drawing!

PRAVEEN P

CREATING
DEVELOPER
ACCOUNT

DISPLAY/
TRACKING

PURAL
LABEL

DISPLAY
/TRACKINGS

RADHA P

FIELD
AVAILABLE
ON
DISPATCH/
TRACKING

DISPATCHED
TRACKING ID
SALES
ORDERS

RELATIONSHIP
BETWEEN
OBJECTS

MASTER
DETAIL
RELATIONSHIP

RATHIKA C

LIGHTNING
EXPERIENCE
APP
MANAGER

ACCOUNT
CONTRACTS
DISPATCHES
DEALS
WAREHOUSES

CUSTOM
OBJECT TABS
WAREHOUSE

USERS
VALIDATION
EMAIL
ACCOUNT
CONTACT

3 RESULT

3.1 Data Modal:

Obeject name	Fields in the Object	
Obj 1	Field label	Data type
	Display/tracking	text
	Dispatch/tracking	Checkbox
Obj 2	Field label	Data label
	Dispatch/tracking	Master-detail relationship
	Contact	Formula

3.2 ACTIVITY AND SCREENSHOT

Milestone-1:

Activity-1

Creating Developer Account

The screenshot shows the Salesforce Developer Edition Sign-up page. On the left, there is a blue banner with the text "Build enterprise-quality apps fast to bring your ideas to life" and a list of features: "Build apps fast with drag and drop tools", "Customize your data model with clicks", "Go further with Apex code", "Integrate with anything using powerful APIs", "Stay protected with enterprise-grade security", and "Customize UI with clicks or any leading-edge web framework". On the right, there is a white sign-up form with the Salesforce logo at the top. The form title is "Sign up for your Salesforce Developer Edition" with the subtitle "A full-featured copy of the Platform, for free". Below the title, it says "Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial." The form fields are: "First Name*" (text input), "Last Name*" (text input), "Email*" (text input), "Role*" (dropdown menu), and "Company*" (text input). The browser's address bar shows "developer.salesforce.com/signup". The Windows taskbar at the bottom shows the date and time as 4:17 PM on 4/13/2023.

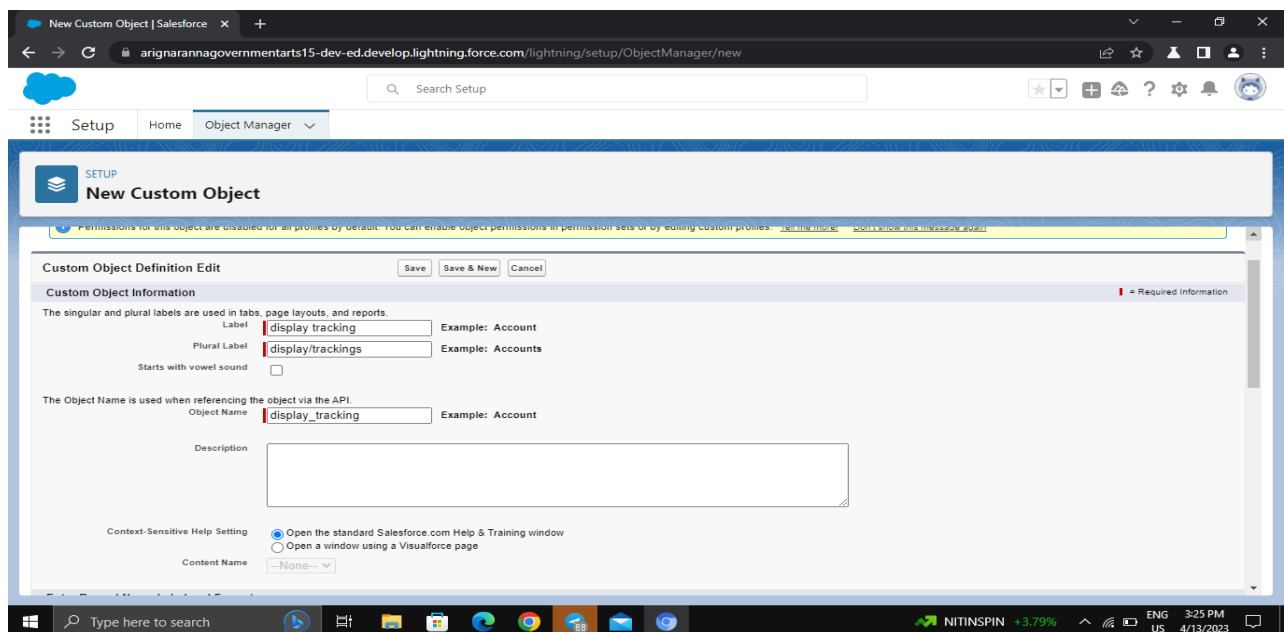
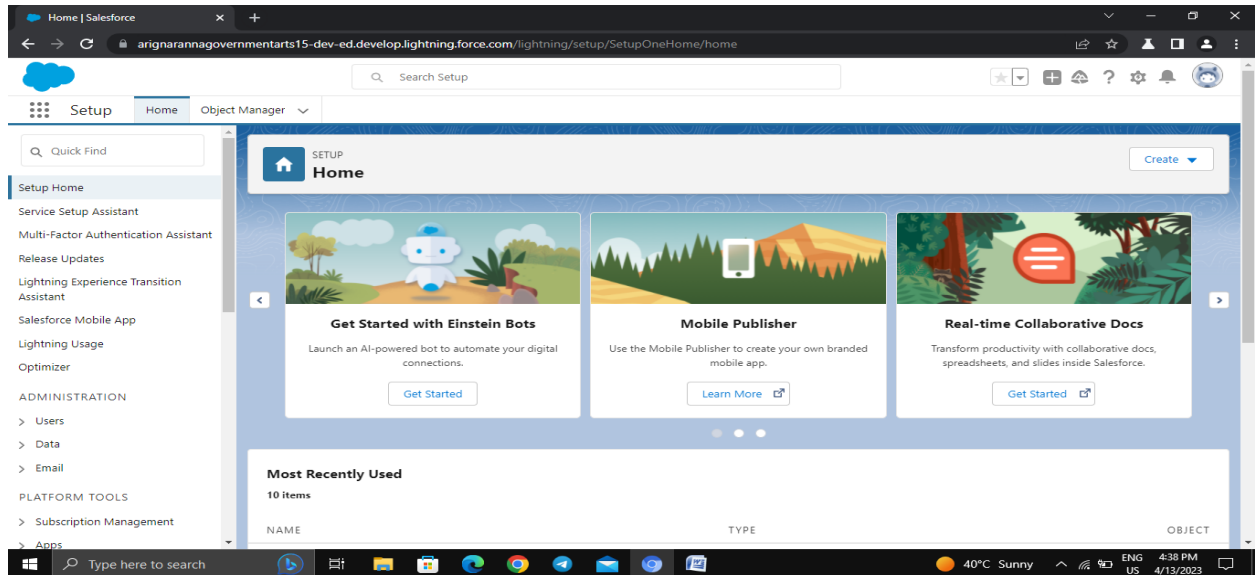
Account Activation

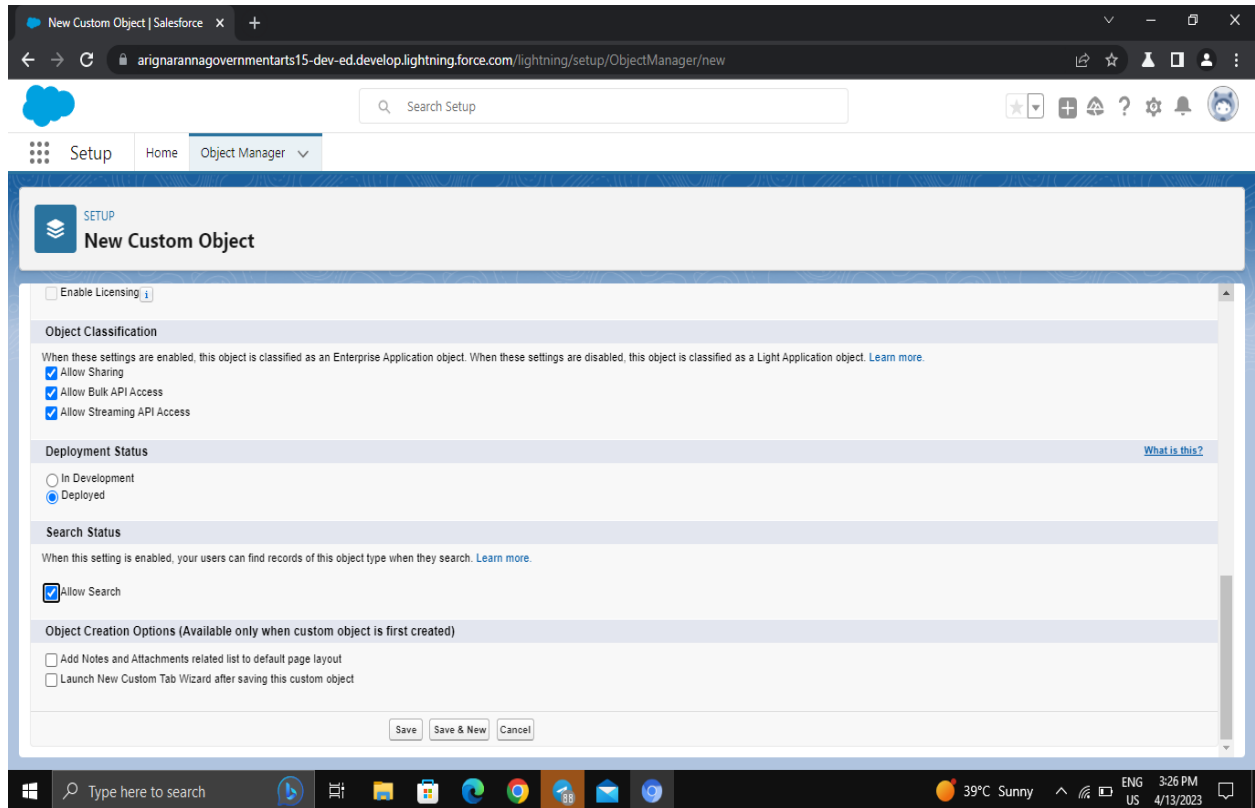
The screenshot shows a Gmail inbox on the left and a Salesforce account verification email on the right. The Gmail inbox lists several emails, including one from "developer@salesforce.com" with the subject "Welcome to Salesforce" and "Thanks for signing up". The Salesforce email on the right has the subject "Thanks for signing up with Salesforce!" and contains a "Verify Account" link. Below the link, it says "To easily log in later, save this URL:" followed by the URL "https://arignarannagovernmentarts15-dev-ed.develop.my.salesforce.com". The Windows taskbar at the bottom shows the date and time as 4:25 PM on 4/13/2023.

Milestone-2 Objects:

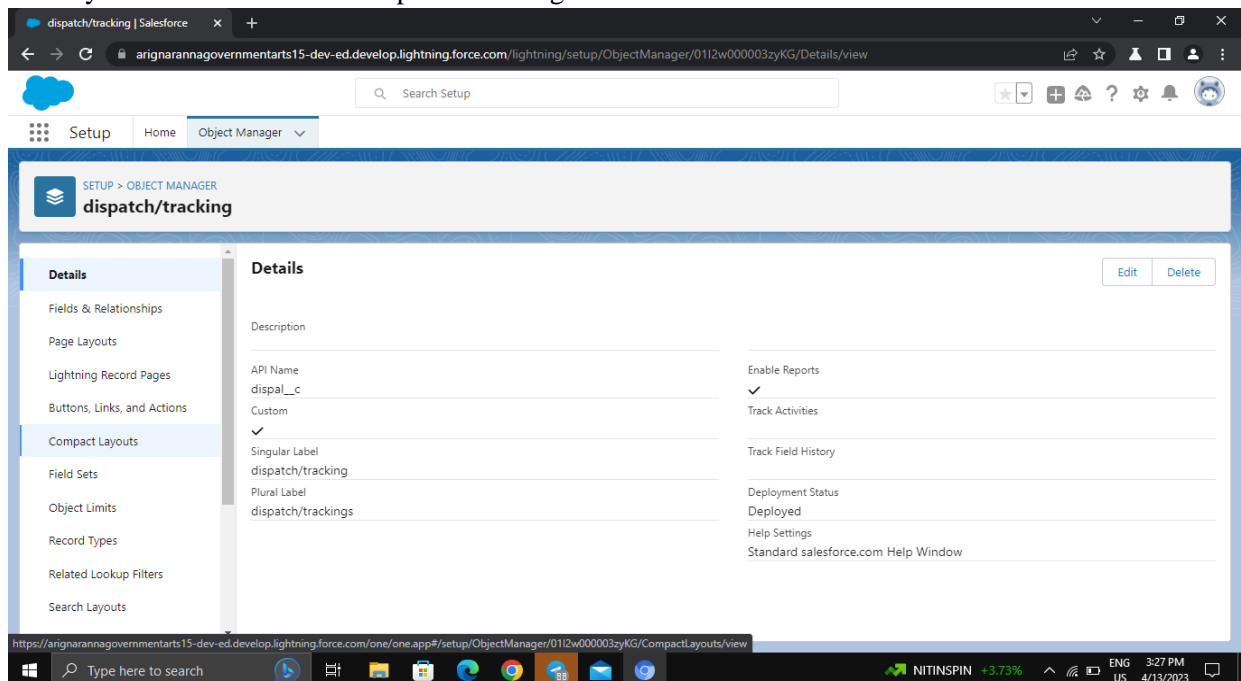
Activity 1

Creation of object Dispatch/Tracking





Activity- 2 Field available on Dispatch/tracking



dispatch/tracking | Salesforce

arignarannagovernmentarts15-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003zyKG/FieldsAndRelationships/view

Search Setup

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

dispatch/tracking

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

Fields & Relationships

5 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	account_c	Master-Detail(Account)		✓	
Contact	Contact_c	Master-Detail(Contact)		✓	
Created By	CreatedById	Lookup(User)			
dispal Name	Name	Text(80)		✓	
Last Modified By	LastModifiedById	Lookup(User)			

Type here to search

NITINSPIN +3.73%

ENG US

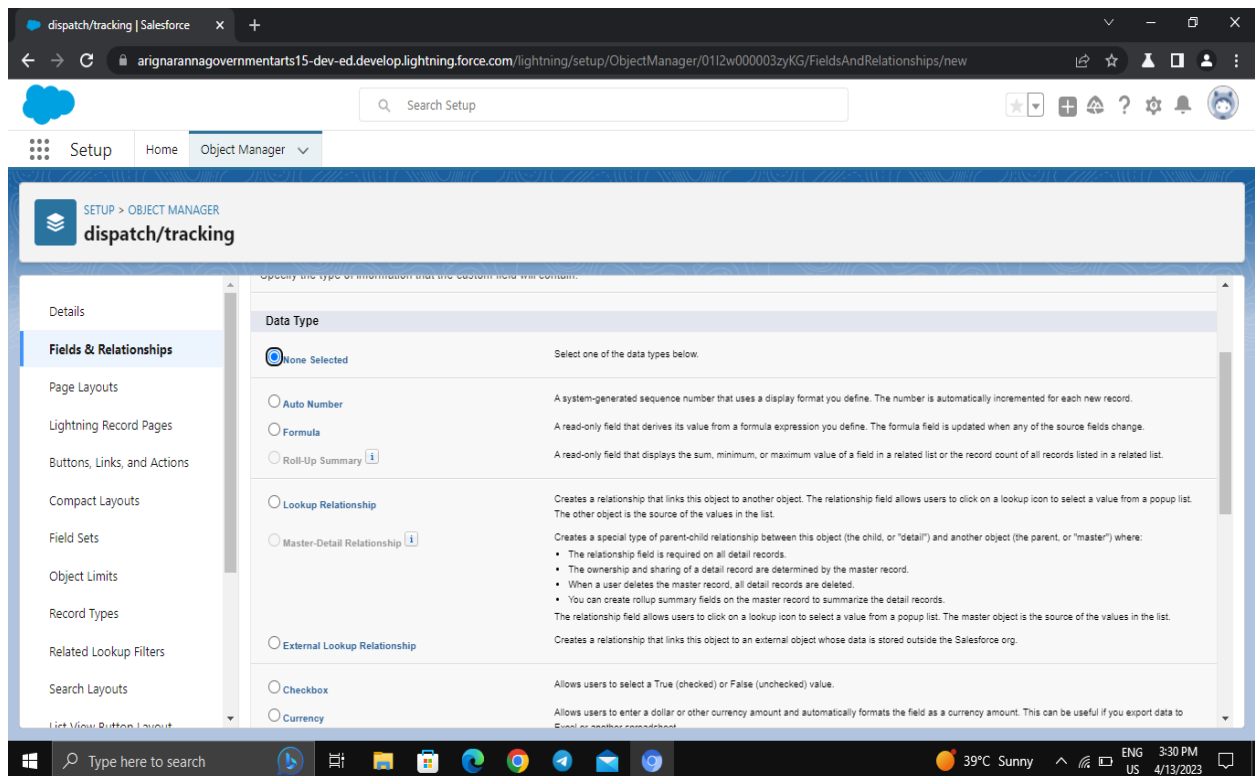
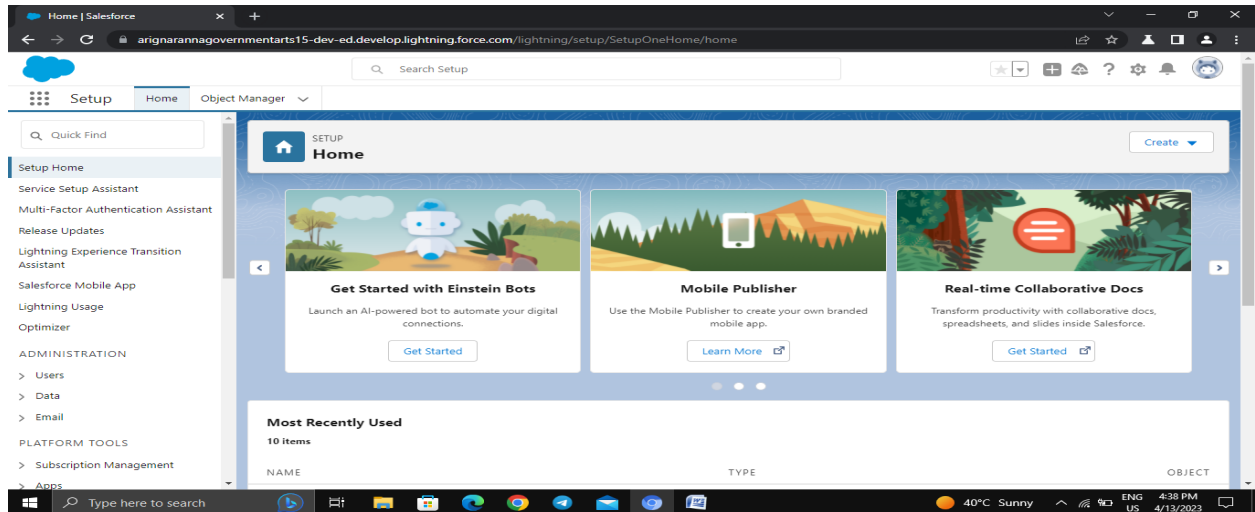
3:28 PM

4/13/2023

Milestone-3 Relationship between objects:

Activity-1

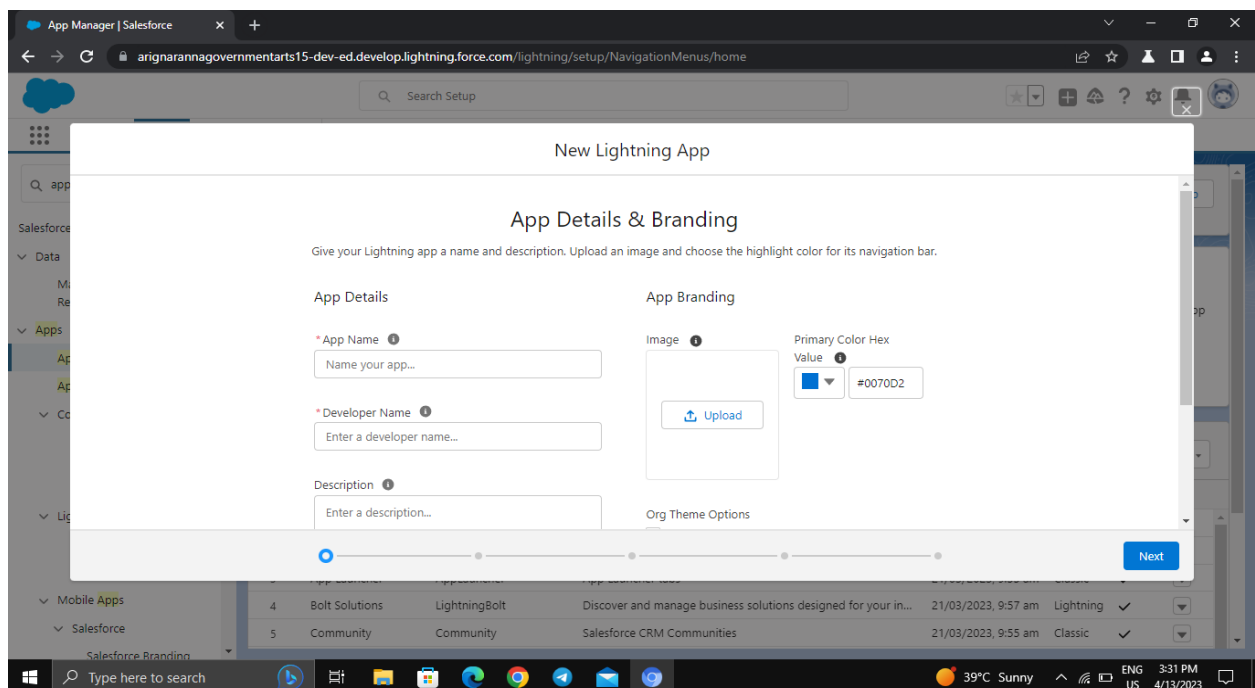
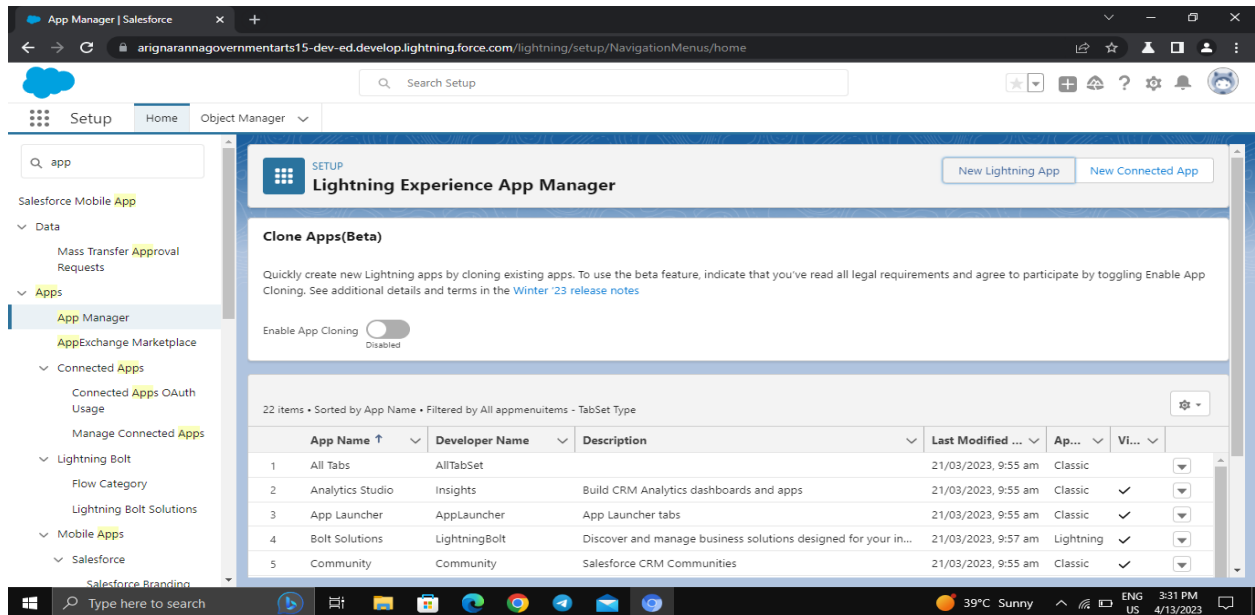
Creation of Relationships between objects



Milestone -4 Application:

Activity-1

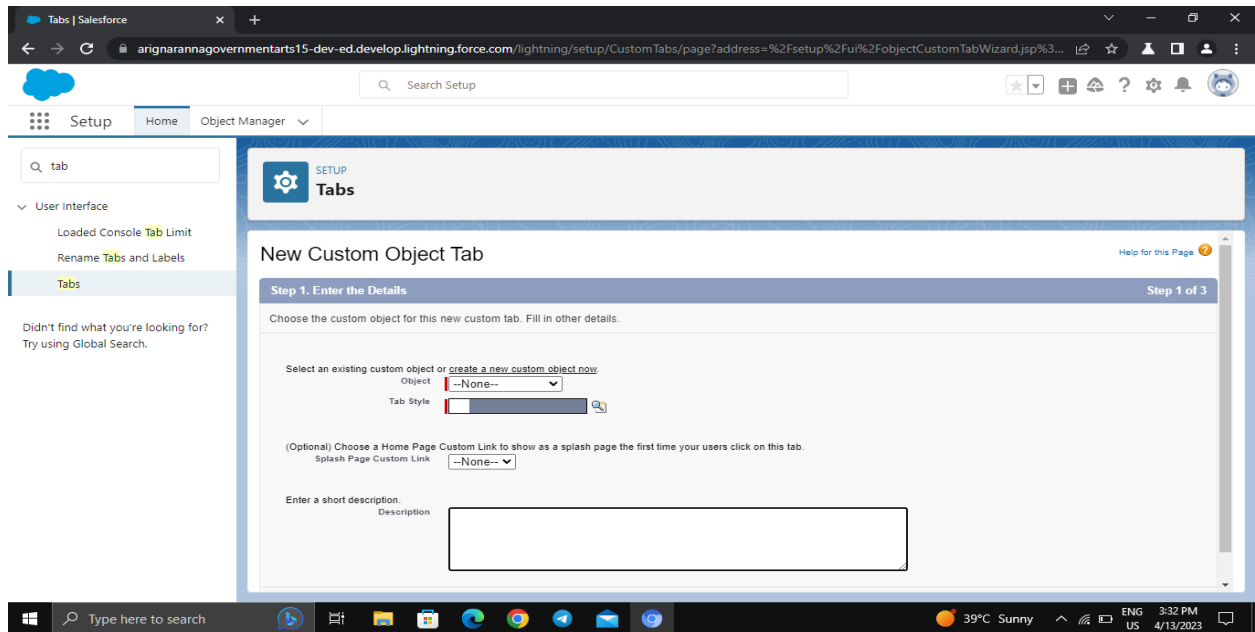
Creation of Application



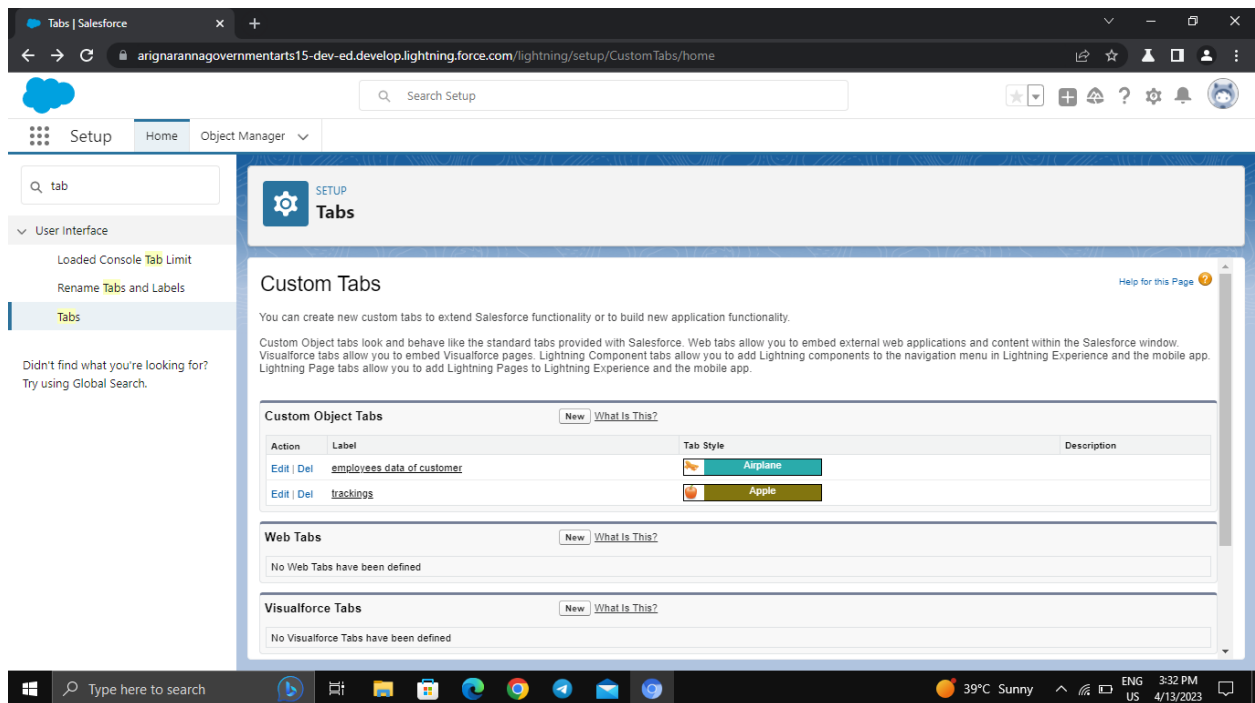
Milestone-5 Layouts:

Activity-1:

Creation of custom Tabs



The screenshot shows the Salesforce Setup interface for creating a new custom object tab. The left sidebar contains a search bar and a navigation menu with 'User Interface' expanded, showing 'Loaded Console Tab Limit', 'Rename Tabs and Labels', and 'Tabs' (selected). The main content area is titled 'New Custom Object Tab' and includes a 'Help for this Page' link. The page is divided into three steps, with 'Step 1. Enter the Details' being the active step. The instructions for Step 1 are: 'Choose the custom object for this new custom tab. Fill in other details.' The form includes a dropdown for 'Object' (currently set to '--None--'), a 'Tab Style' field, an optional 'Splash Page Custom Link' dropdown (also set to '--None--'), and a 'Description' text area. The bottom of the screen shows a Windows taskbar with various application icons and system information: 39°C Sunny, ENG US, 3:32 PM, 4/13/2023.



The screenshot shows the Salesforce Setup interface for managing custom tabs. The left sidebar is identical to the previous screenshot. The main content area is titled 'Custom Tabs' and includes a 'Help for this Page' link. The instructions state: '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.' The page is divided into three sections: 'Custom Object Tabs', 'Web Tabs', and 'Visualforce Tabs'. Each section has a 'New' button and a 'What Is This?' link. The 'Custom Object Tabs' section contains a table with two rows of existing tabs.

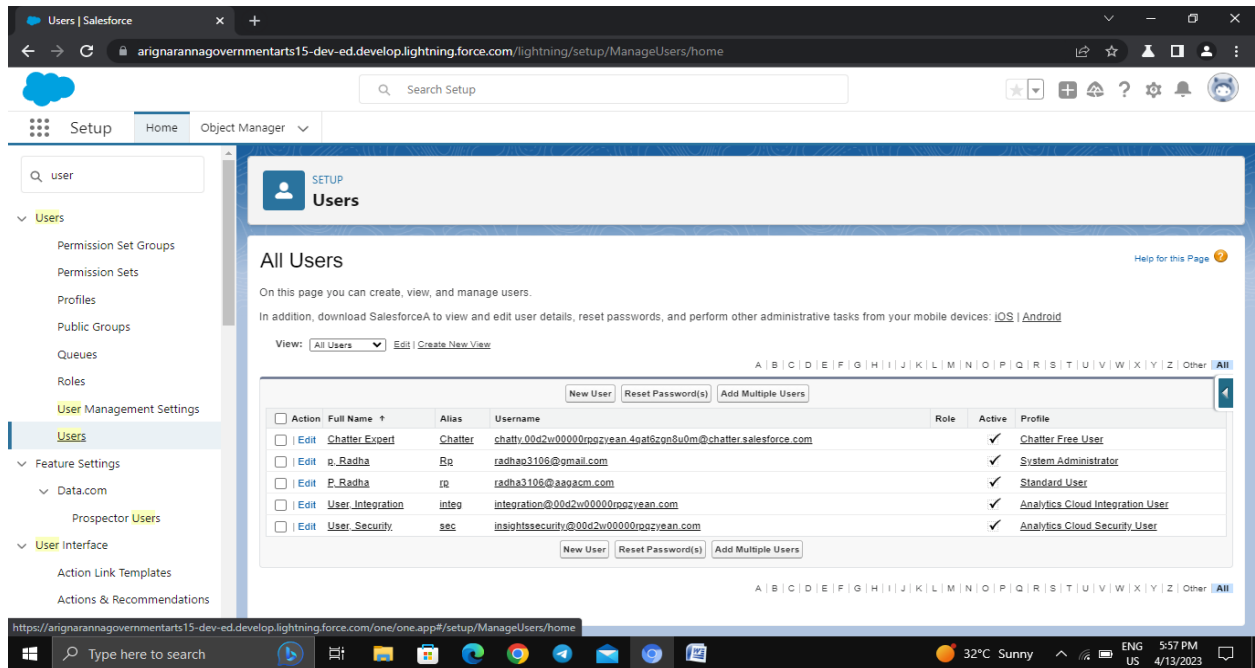
Action	Label	Tab Style	Description
Edit Del	employees data of customer	Airplane	
Edit Del	trackings	Apple	

The 'Web Tabs' section shows 'No Web Tabs have been defined'. The 'Visualforce Tabs' section shows 'No Visualforce Tabs have been defined'.

Milestone-6 User:

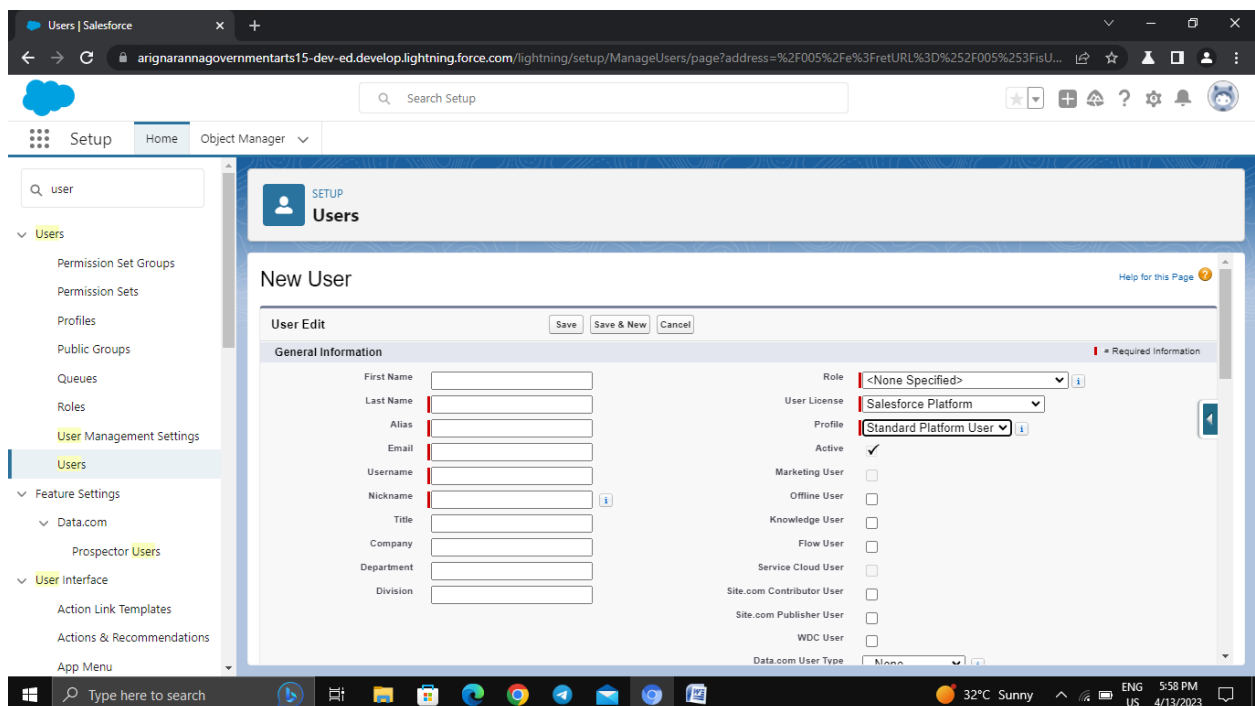
Activity-1

Creation of user



The screenshot shows the Salesforce Setup interface for managing users. The left sidebar contains a navigation menu with options like Setup, Home, Object Manager, and a search bar. The main content area is titled "All Users" and includes a table of existing users. The table has columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The following table represents the data shown in the screenshot:

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatty_00d2w00000ropzyean.4gat6zon8u0m@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
Edit	a_Radha	Ra	radha3106@gmail.com		<input checked="" type="checkbox"/>	System Administrator
Edit	P.Radha	ra	radha3106@aaqacm.com		<input checked="" type="checkbox"/>	Standard User
Edit	User Integration	integ	integration@00d2w00000ropzyean.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Edit	User Security	sec	insightssecurity@00d2w00000ropzyean.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

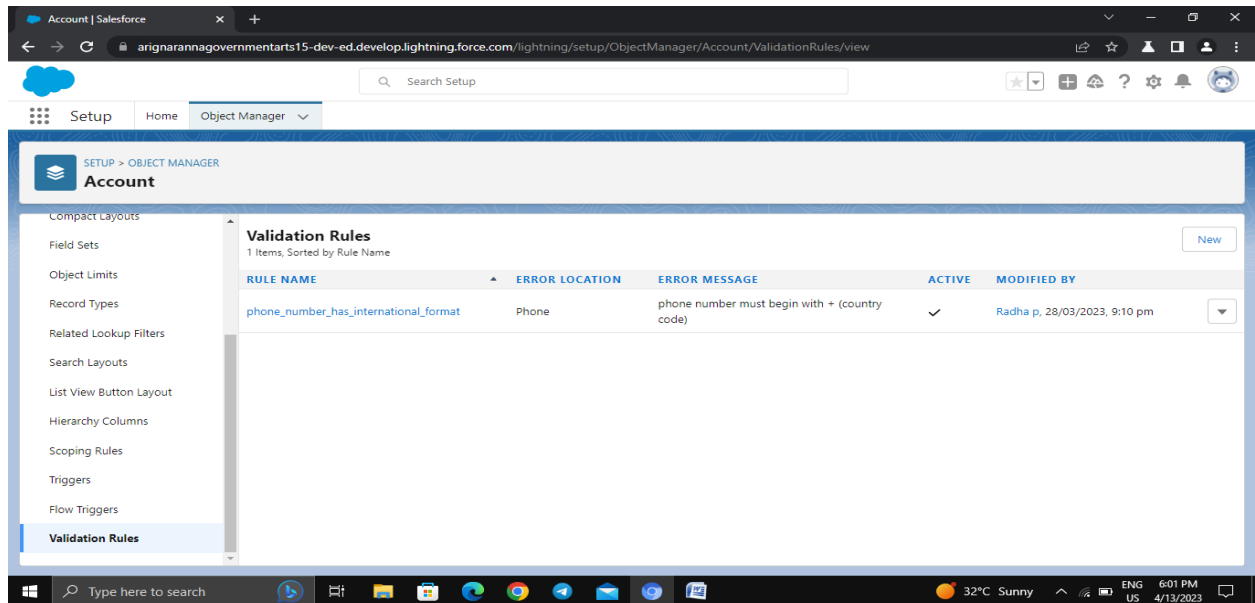


The screenshot shows the Salesforce Setup interface for creating a new user. The left sidebar is the same as the previous screenshot. The main content area is titled "New User" and contains a "User Edit" form. The form has two main sections: "General Information" and "User License/Profile". The "General Information" section includes fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. The "User License/Profile" section includes a dropdown for Role (set to "<None Specified>"), a dropdown for User License (set to "Salesforce Platform"), a dropdown for Profile (set to "Standard Platform User"), and checkboxes for Active, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, and Data.com User Type.

Milestone-7 Validation Rules:

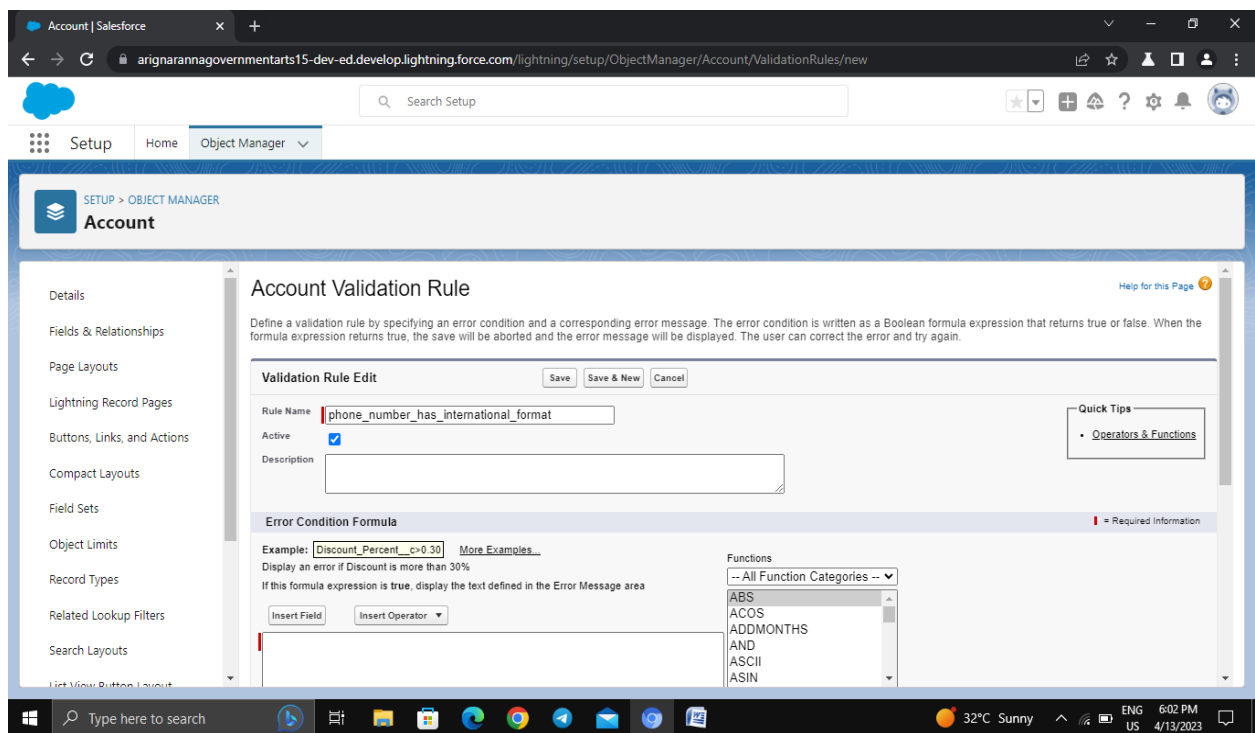
Activity-1

Creation of validation rule



The screenshot shows the Salesforce Setup page for an Account. The left sidebar lists various setup options, with 'Validation Rules' selected. The main content area displays a table of validation rules for the Account object. The table has columns for Rule Name, Error Location, Error Message, Active status, and Modified By. One rule is listed: 'phone_number_has_international_format' with an error location of 'Phone' and an error message of 'phone number must begin with + (country code)'. The rule is active and was modified by 'Radha p.' on 28/03/2023 at 9:10 pm.

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
phone_number_has_international_format	Phone	phone number must begin with + (country code)	✓	Radha p, 28/03/2023, 9:10 pm



The screenshot shows the 'New Validation Rule' form in Salesforce Setup. The form is titled 'Account Validation Rule' and includes a description of how validation rules work. The 'Rule Name' field is populated with 'phone_number_has_international_format'. The 'Active' checkbox is checked. The 'Error Condition Formula' section is visible, showing an example formula: 'Discount_Percent__c > 0.30'. The 'Functions' dropdown menu is open, displaying a list of functions including ABS, ACOS, ADDMONTHS, AND, ASCII, and ASIN.

Validation Rule Edit

Rule Name: phone_number_has_international_format

Active: ☒

Description:

Error Condition Formula

Example: Discount_Percent__c > 0.30

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: ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN

Activity-2:

Cross Object Formula

Creation of cross object

This screenshot shows the Salesforce Setup interface for the 'Contact' object. The 'Fields & Relationships' section is active, displaying a list of 32+ fields. The table below lists the first 10 fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Account Name	Accountid	Lookup(Account)		✓
Assistant	AssistantName	Text(40)		
Asst. Phone	AssistantPhone	Phone		
Birthdate	Birthdate	Date		
Clean Status	CleanStatus	Picklist		✓
Contact Owner	Ownerid	Lookup(User)		✓
Created By	CreatedByid	Lookup(User)		
Data.com Key	Jigsaw	Text(20)		
Department	Department	Text(80)		
Description	Description	Long Text Area(32000)		

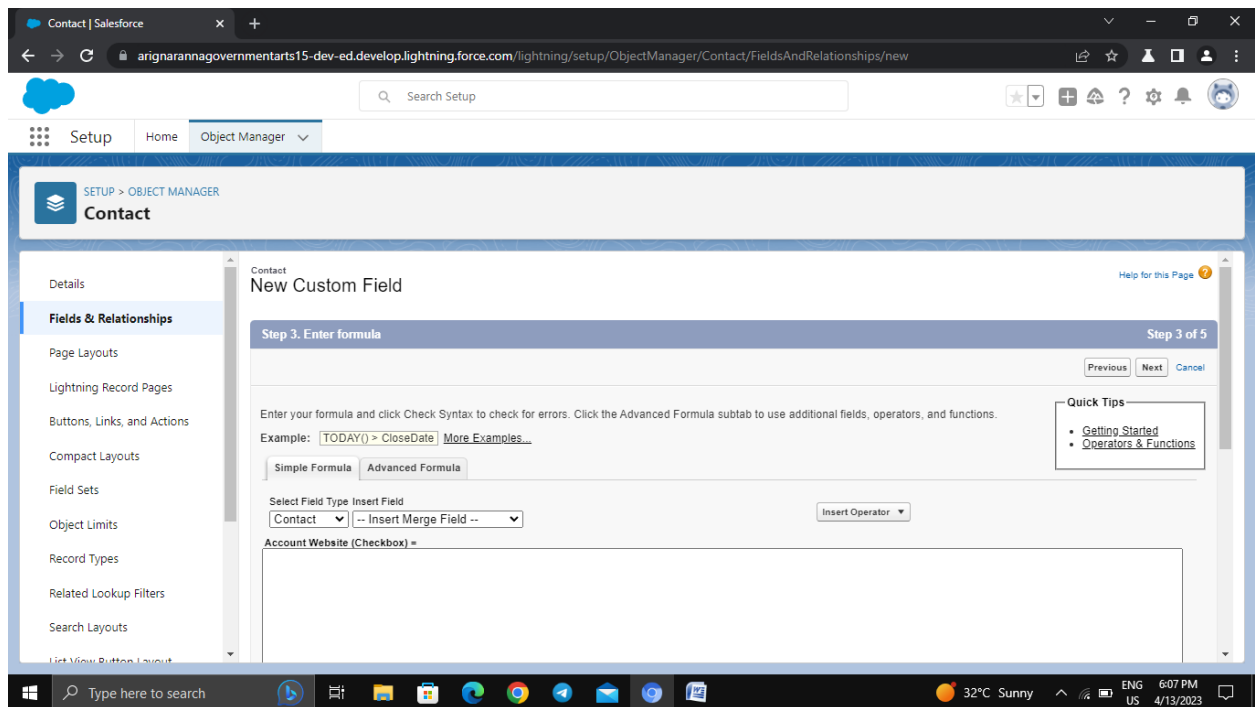
This screenshot shows the 'New Custom Field' wizard for the 'Contact' object. The first step is 'Choose the field type'. The 'Formula' option is selected under the 'Data Type' section.

Step 1. Choose the field type

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

Data Type

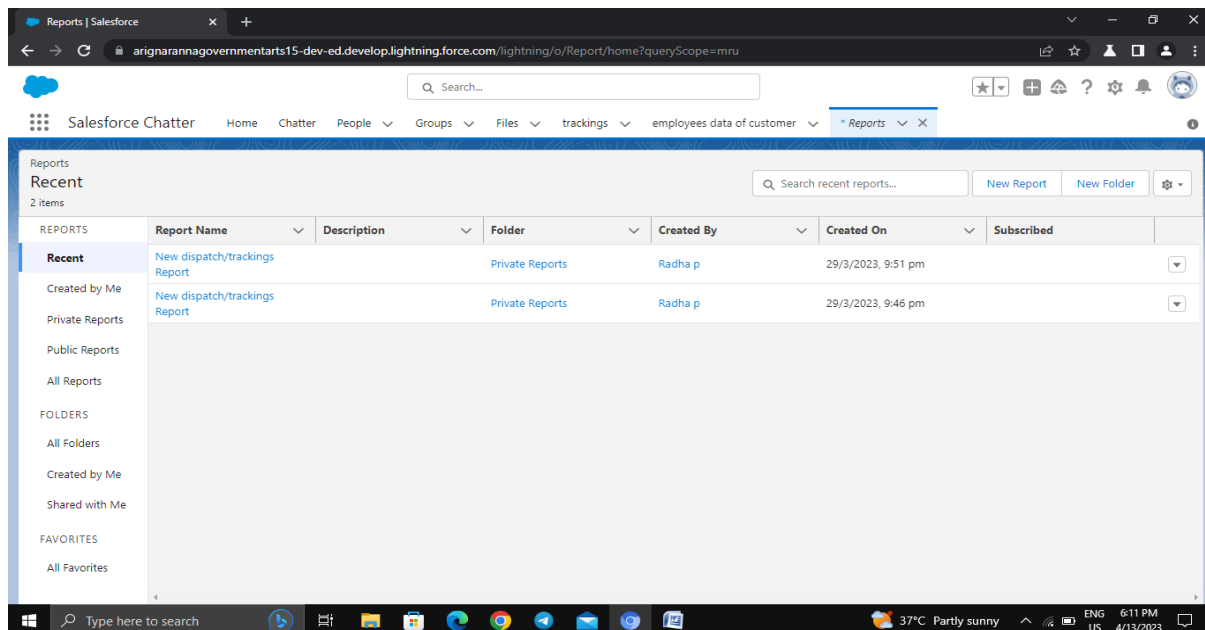
- ☐ None Selected: Select one of the data types below.
- ☐ Auto Number: A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
- ☒ Formula: A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
- ☐ Roll-Up Summary: 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.
- ☐ Lookup Relationship: 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 popup list. The other object is the source of the values in the list.
- ☐ External Lookup Relationship: Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

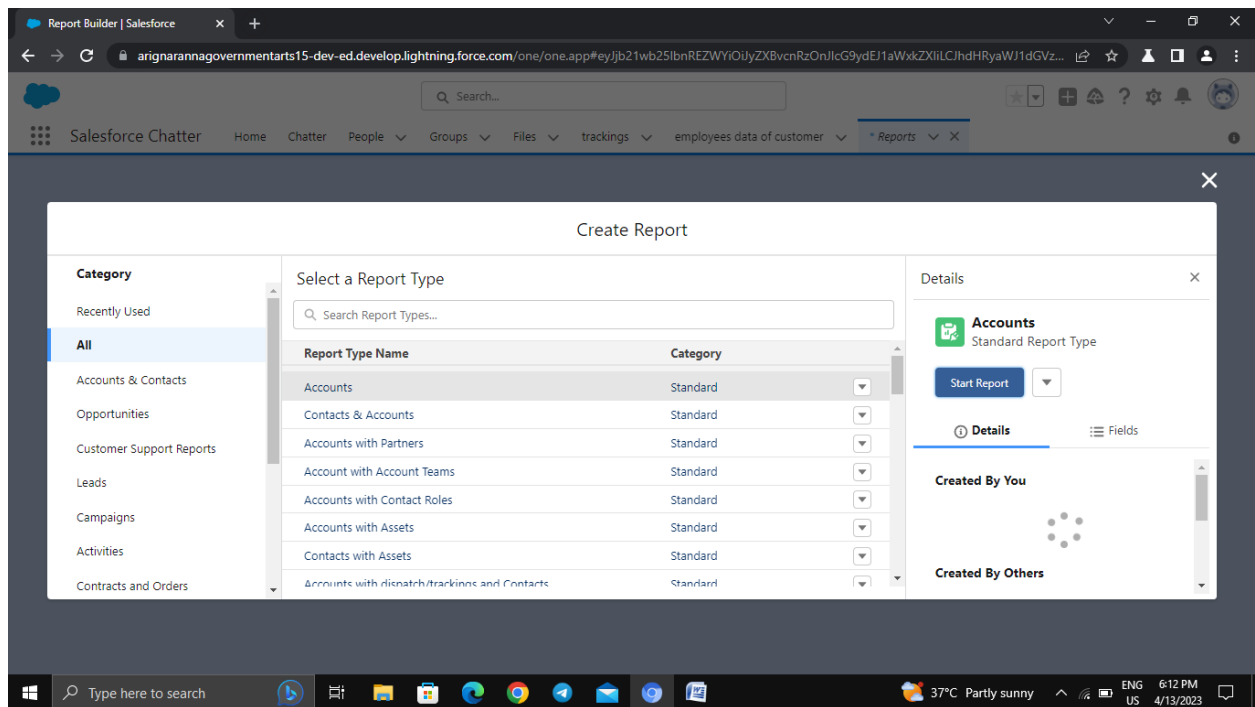


Milestone-7 Reports:

Activity:

Creation of Report

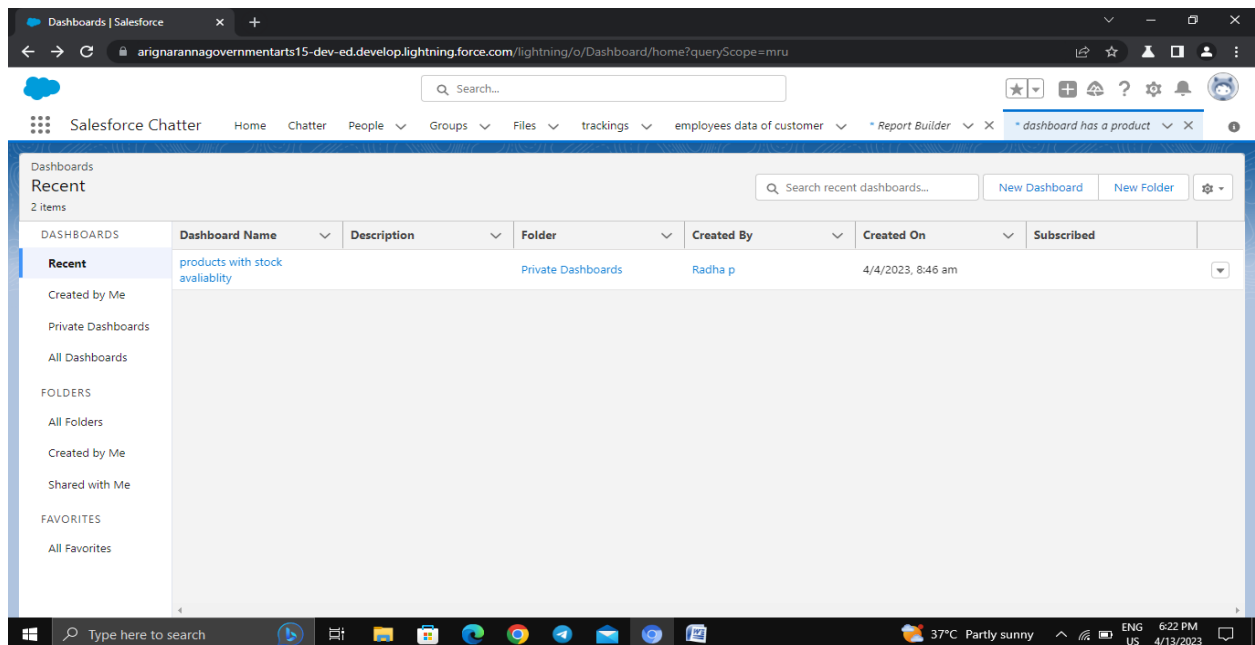


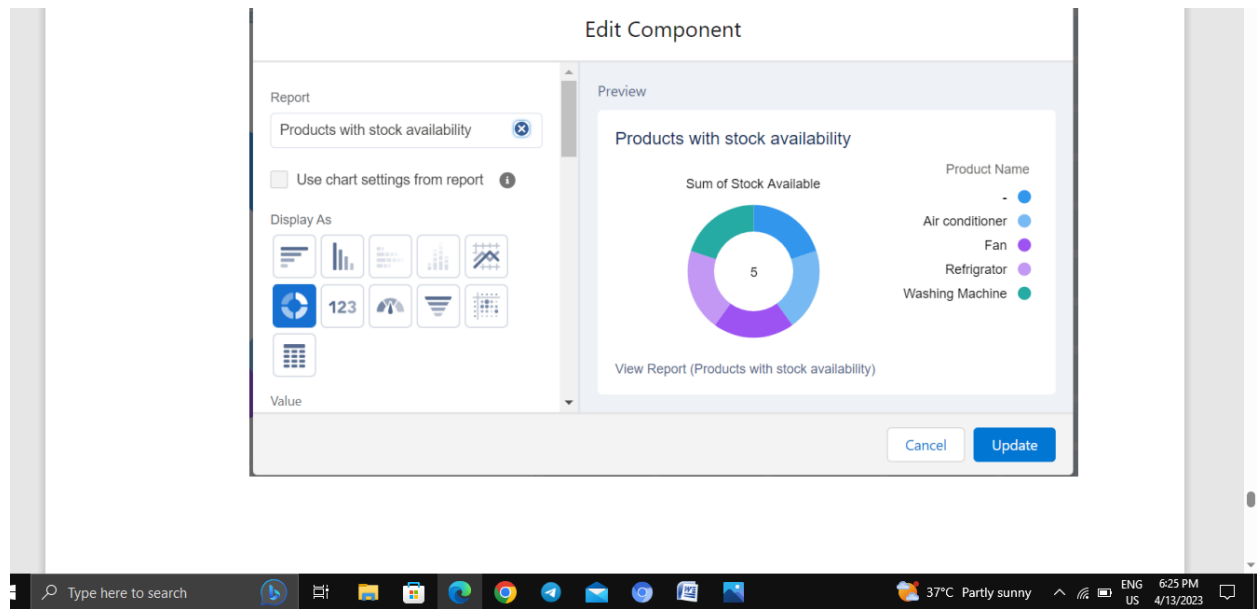


Milestone-8 Dashboards:

Activity

Creation of Dashboard





4 Trailhead Profile Public URL

Team Lead - <http://trailblazer.me/id/praveen2909>

Team Member 1 - <https://trailblazer.me/id/radha06>

Team Member 2 - <https://trailblazer.me/id/rathika10>

Project Report Template

5 ADVANTAGES

1. Customer satisfaction

The biggest advantage of retail management is customer satisfaction. Efficacious planning and management prevent the situation where the customers need to be kept waiting.

Even if there are a lot of people in the store, as in the case of festivities, managing the orders is the key to success. It is the task of the retail manager to ensure that the customer executives assist the customers and attend to everyone properly.

2. Hassle-free shopping

It helps the customers to find all the products easily in the store. All the products are arranged properly by categorizing them according to their price, quantity, brand, etc, so the customers can easily find the desired products in no time.

The retailers won't even need to get up and fetch the product for their customers.

DISADVANTAGES

Fixed Margins and Low Scale of Operations

The biggest problem with retail business is that profit margins of this business is fixed which ranges from 5 to 20 percent depending upon the brand of the product which retailer is selling and also unlike wholesaler who can expand business in order to achieve economies of scale in case of retailing such thing is not possible.

Requires Good Location

Another problem of retail shops is that good location is one of the factors in order to be successful in retail business and if you are the owner of building than it is not much of a problem but if you take shop on rent than you have to pay high rent in order to take shop on rent at good location.

6 APPLICATIONS

intelligent application for business processes including:

- Sales
- Customer Service
- Field Service
- Talent Management
- Finance and Operations
- Project Service Automation
- Marketing
- Customer Insights

According to Microsoft, Dynamics for Retail is an “end-to-end retail solution” for retail channels including brick-and-mortar stores, online stores, and call centers.

7 CONCLUSION

In this course we have explored the meaning of the terms retailing, marketing and marketing communications. We have also considered the importance of the marketing mix and identified the different communication tools that a retailer might use to interact and communicate with their target customers. You have been introduced to a few theoretical concepts and ideas, which have been illustrated using real world examples and cases in retailing.

8 FUTURE SCOPE

The retail sector in the country is currently booming, providing plenty of career prospects for people with a passion for sales marketplaces, business diversification, campaigning, advertising, market research, and segmentation.