Project Report Template

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 fulfil a customer's needs.

1.2 Purpose

Salesforce can be used **to manage**

. **Relationships with distributors and retailers, Including tracking orders and managing Communication and collaboration**.

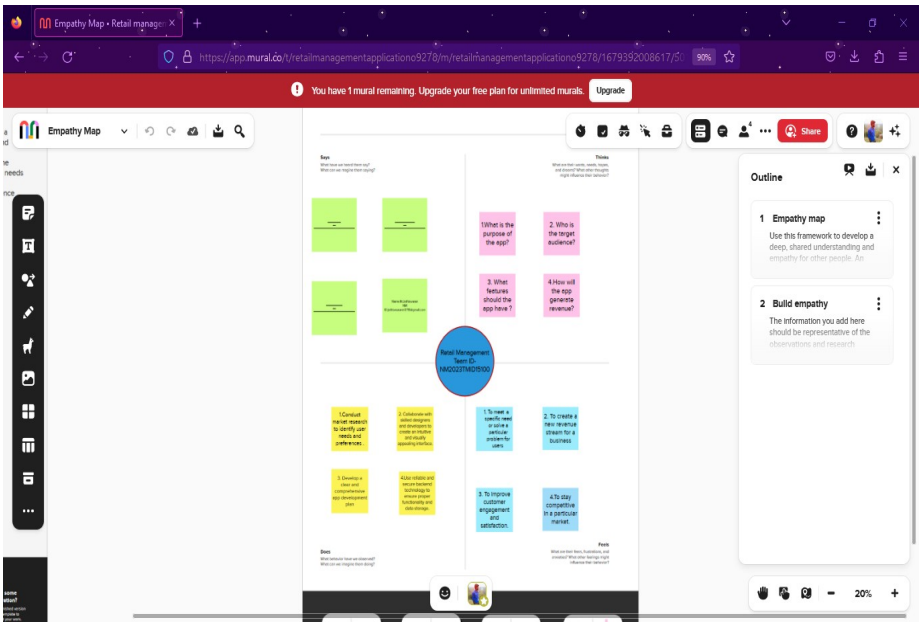
This can help field sales teams ensure that

. They are providing the best possible service to .

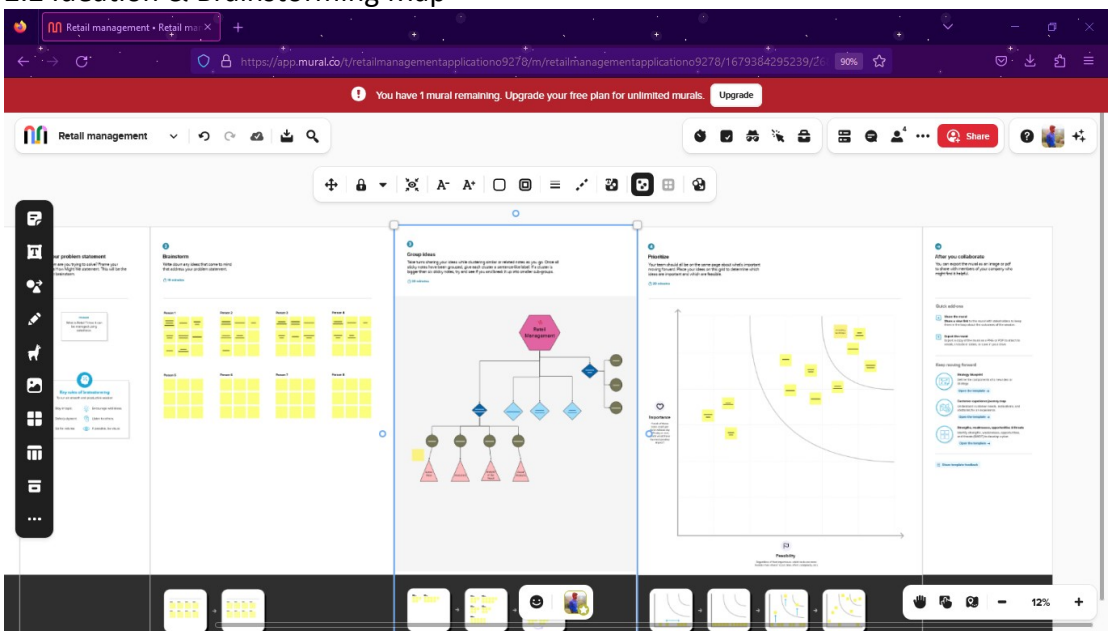
. Their customers.

2 Problem Definition & Design Thinking

2.1 Empathy Map



2.2 Ideation & Brainstorming Map

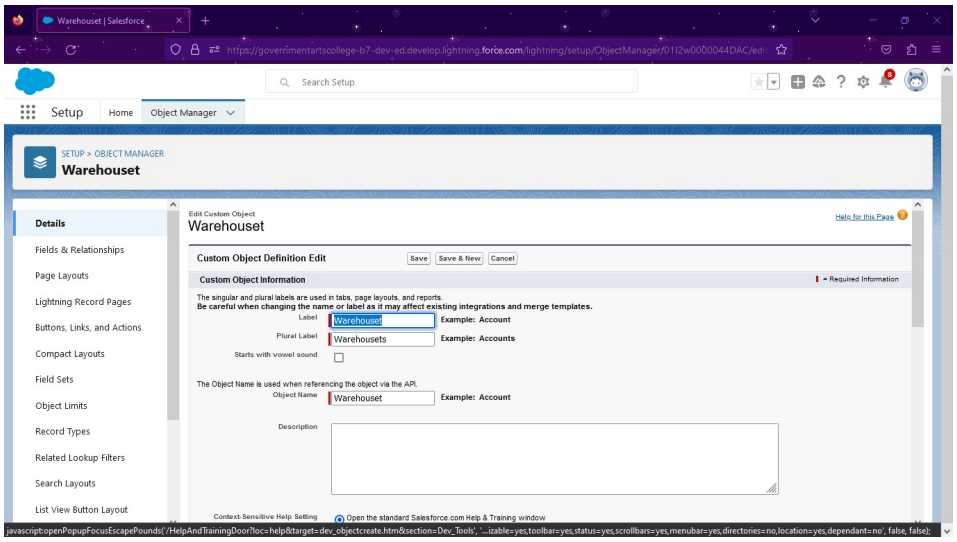


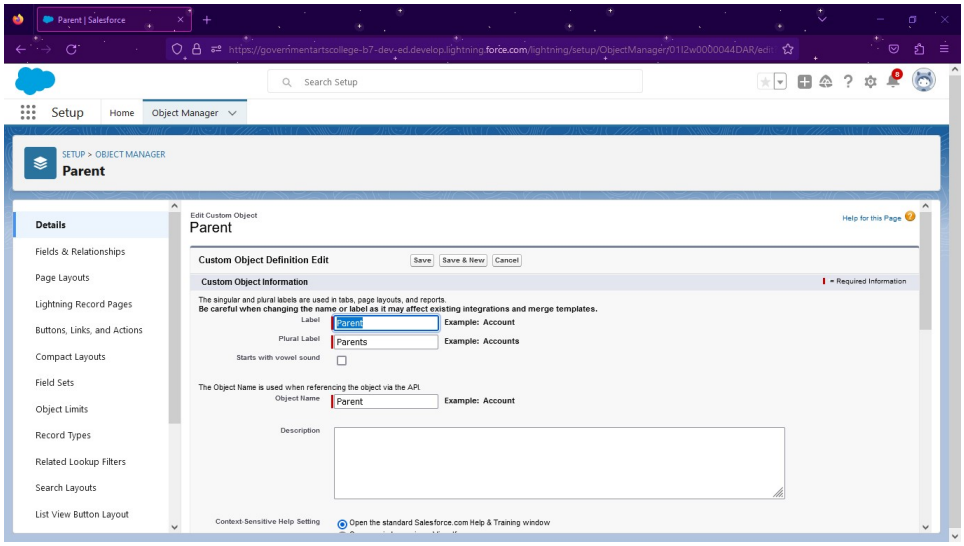
3 RESULT

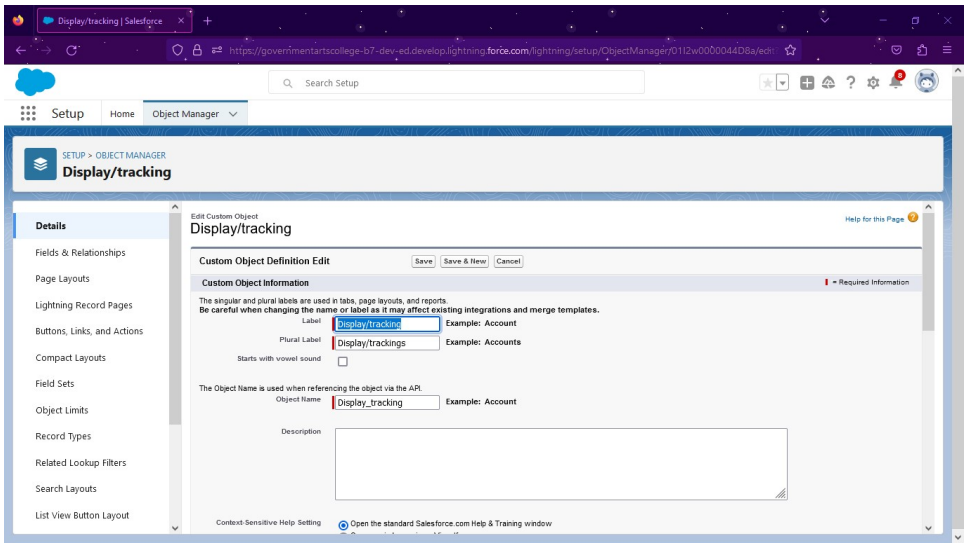
3.1 Data Model:

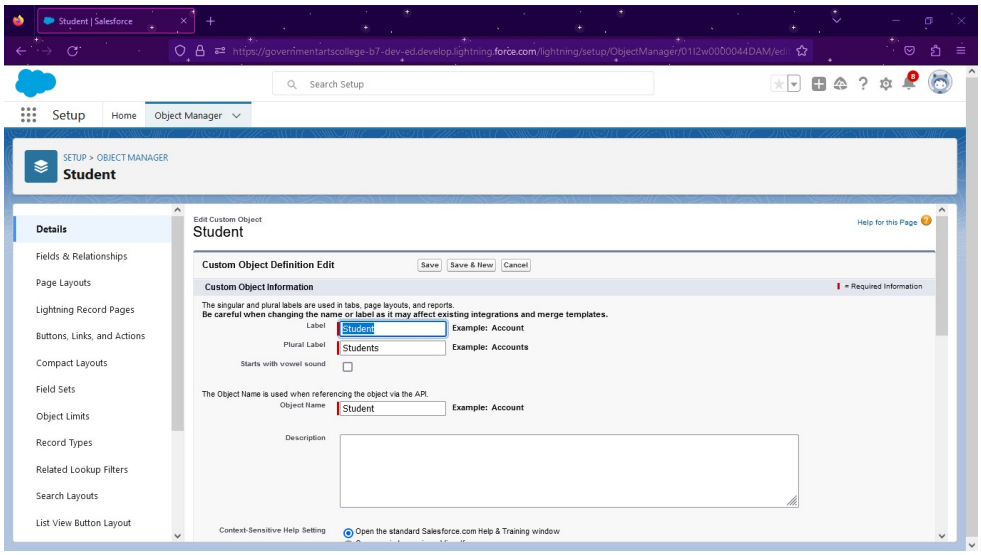
Object name	Fields in the Object
Dispatch/Tracking	Field label: Dispatched — Data type: checkbox Field label: Sales order — Data type: Master detail relationship
Contact	Field label: Account Website — Data type: formula Field label: — Data type:

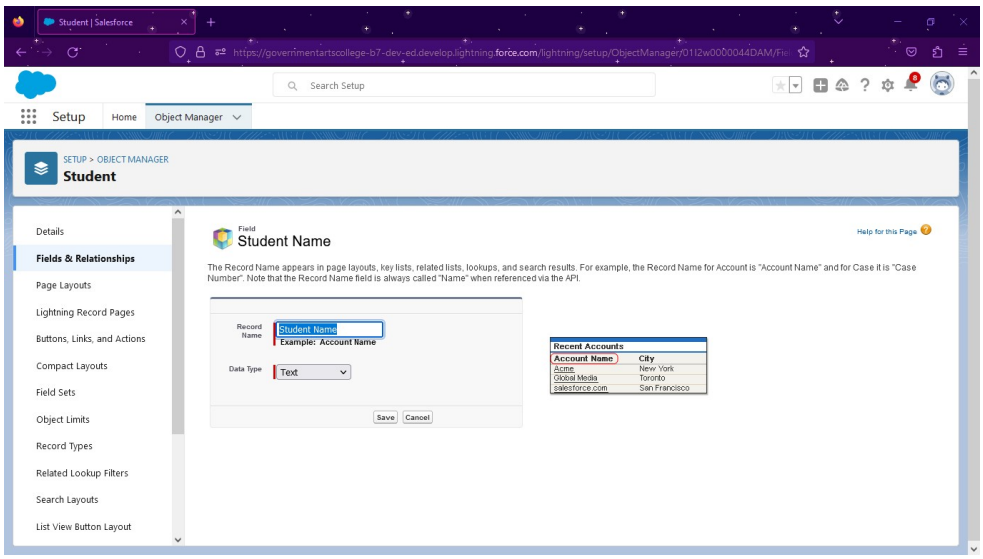
3.2 Activity & Screenshot

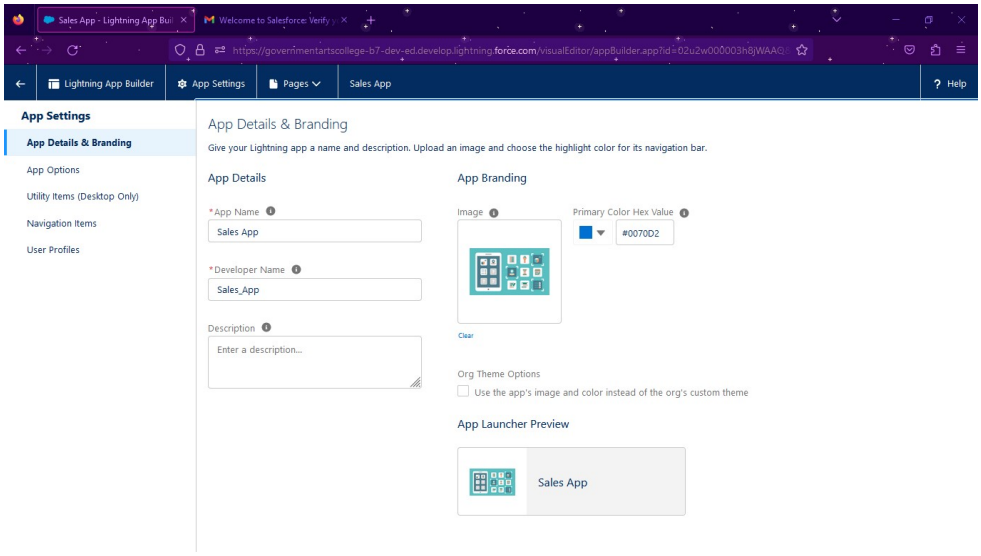


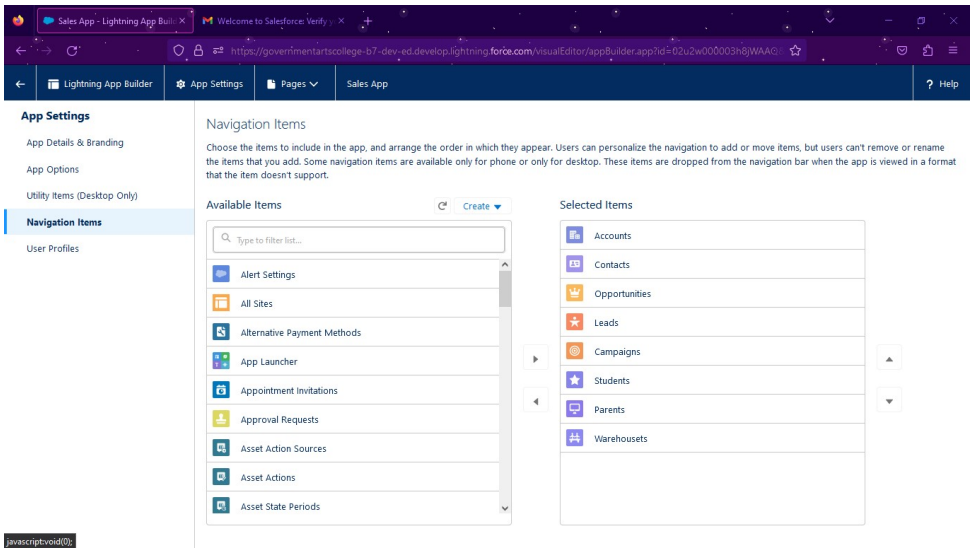


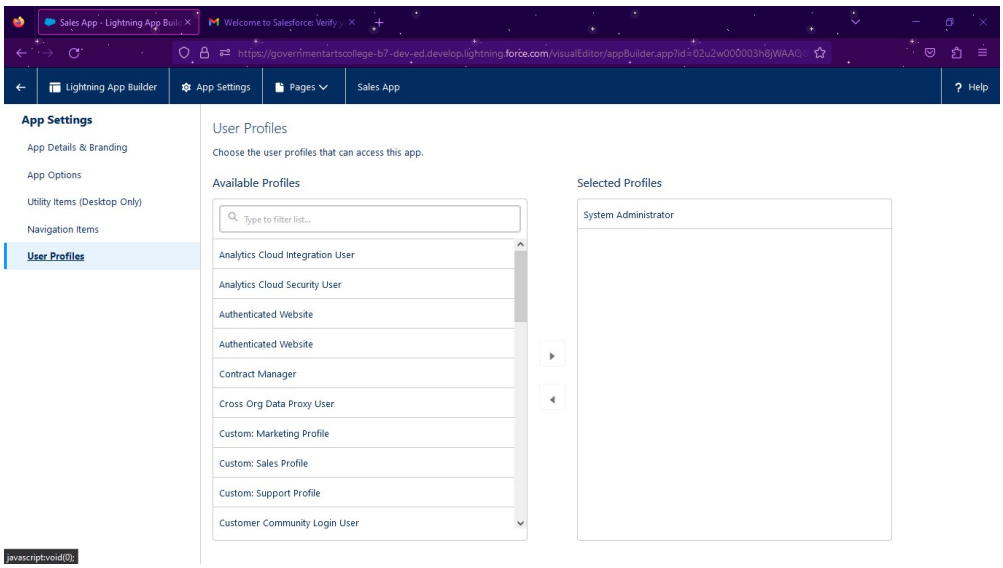

Display/tracking | Salesforce
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Display/tracking
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Edit Custom Object
Display/tracking
Help for this Page
Custom Object Definition Edit
Save
Save & New
Cancel
Custom Object Information
= Required Information
The singular and plural labels are used in tabs, page layouts, and reports.
Be careful when changing the name or label as it may affect existing integrations and merge templates.
Label
Display/tracking
Example: Account
Plural Label
Display/trackings
Example: Accounts
Starts with vowel sound
The Object Name is used when referencing the object via the API.
Object Name
Display_tracking
Example: Account
Description
Context-Sensitive Help Setting
Open the standard Salesforce.com Help & Training window

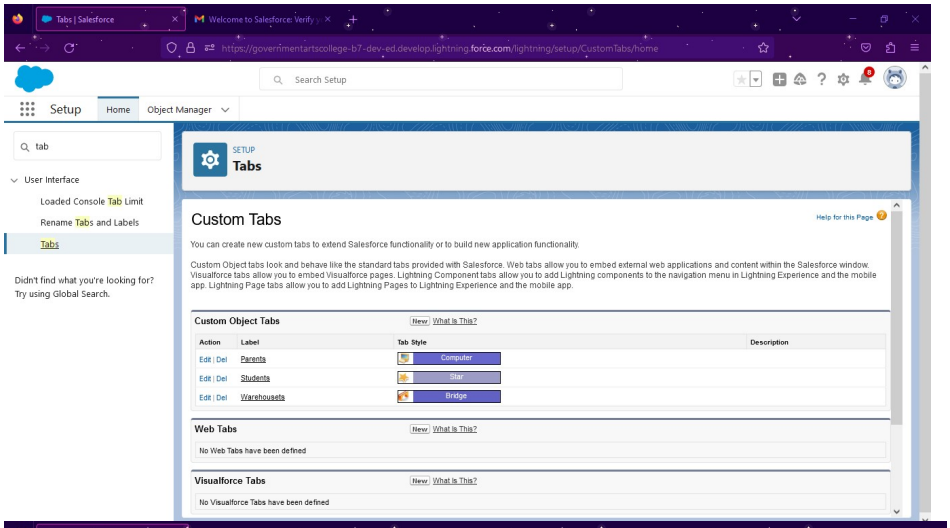

Student | Salesforce
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Student
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Edit Custom Object
Student
Help for this Page
Custom Object Definition Edit
Save
Save & New
Cancel
Custom Object Information
= Required Information
The singular and plural labels are used in tabs, page layouts, and reports.
Be careful when changing the name or label as it may affect existing integrations and merge templates.
Label
Student
Example: Account
Plural Label
Students
Example: Accounts
Starts with vowel sound
The Object Name is used when referencing the object via the API.
Object Name
Student
Example: Account
Description
Context-Sensitive Help Setting
Open the standard Salesforce.com Help & Training window

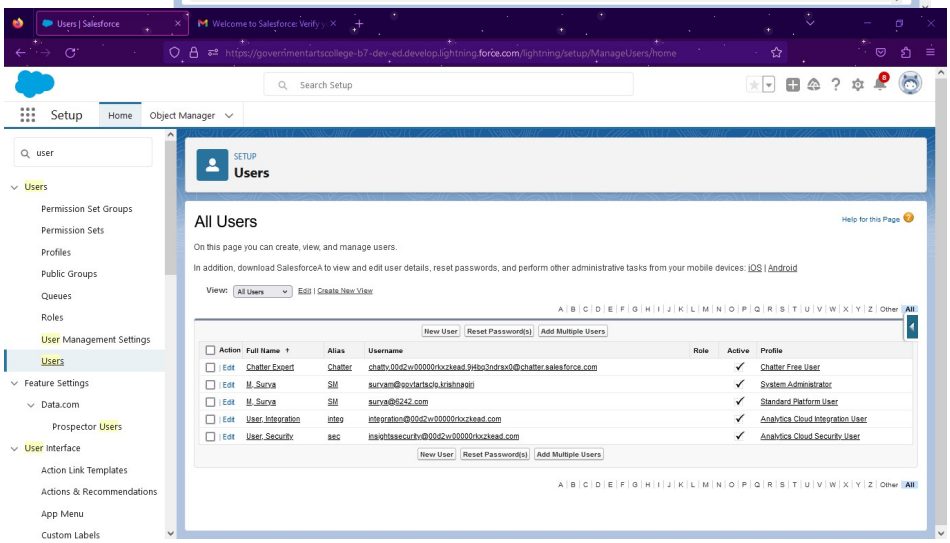

Student | Salesforce
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Student
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Field
Student Name
Help for this Page
The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.
Record Name
Student Name
Example: Account Name
Data Type
Text
Save
Cancel
Recent Accounts
Account Name
City
Acme
New York
Global Media
Toronto
salesforce.com
San Francisco

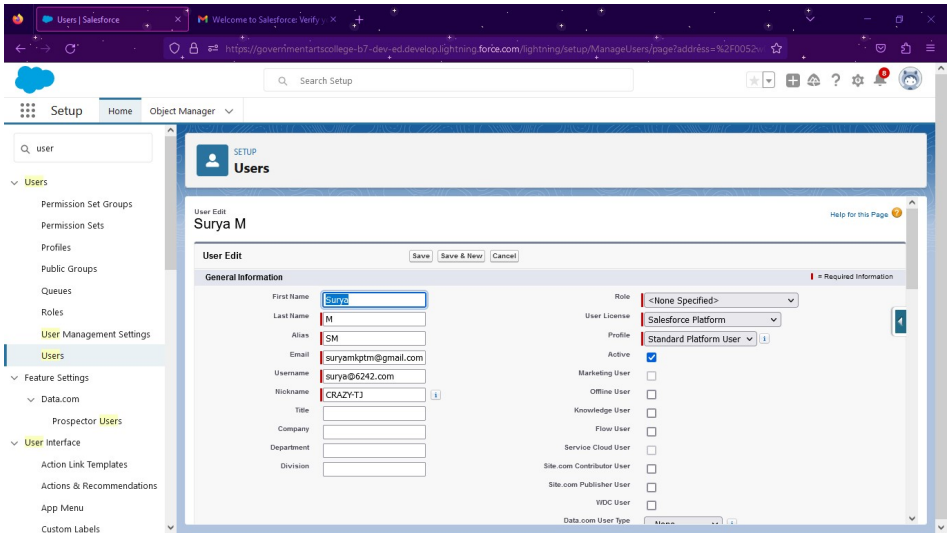

Sales App - Lightning App Bui
Welcome to Salesforce: Verify y
https://governmentartscollege-b7-dev-ed.develop.lightning.force.com/visualEditor/appBuilder.app?id=02u2w000003h8jWAAQ
Lightning App Builder
App Settings
Pages
Sales App
Help
App Settings
App Details & Branding
App Options
Utility Items (Desktop Only)
Navigation Items
User Profiles
App Details & Branding
Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.
App Details
*App Name
Sales App
*Developer Name
Sales_App
Description
Enter a description...
App Branding
Image
Clear
Primary Color Hex Value
#0070D2
Org Theme Options
Use the app's image and color instead of the org's custom theme
App Launcher Preview
Sales App

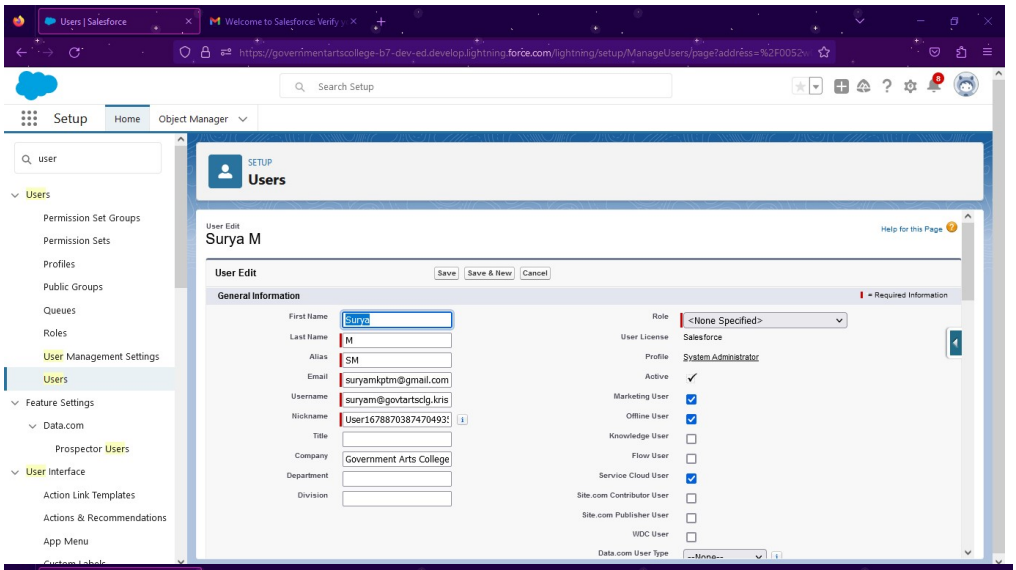

Sales App - Lightning App Bui
Welcome to Salesforce: Verify y
https://governmentartscollege-b7-dev-ed.develop.lightning.force.com/visualEditor/appBuilder.app?id=02u2w000003h8jWAAQ
Lightning App Builder
App Settings
Pages
Sales App
Help
App Settings
App Details & Branding
App Options
Utility Items (Desktop Only)
Navigation Items
User Profiles
Navigation Items
Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.
Available Items
Create
Type to filter list...
Alert Settings
All Sites
Alternative Payment Methods
App Launcher
Appointment Invitations
Approval Requests
Asset Action Sources
Asset Actions
Asset State Periods
Selected Items
Accounts
Contacts
Opportunities
Leads
Campaigns
Students
Parents
Warehousets
javascript:void(0);

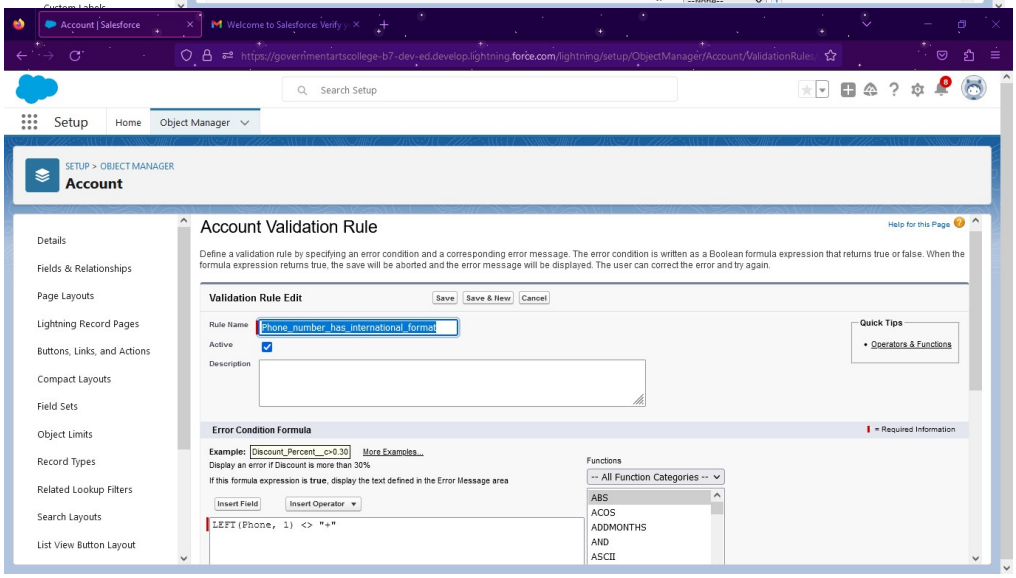

Sales App - Lightning App Bui
Welcome to Salesforce: Verify y
https://governmentartscollege-b7-dev-ed.develop.lightning.force.com/visualEditor/appBuilder.app?id=02u2w000003h8jWAAQ
Lightning App Builder
App Settings
Pages
Sales App
Help
App Settings
App Details & Branding
App Options
Utility Items (Desktop Only)
Navigation Items
User Profiles
User Profiles
Choose the user profiles that can access this app.
Available Profiles
Type to filter list...
Analytics Cloud Integration User
Analytics Cloud Security User
Authenticated Website
Authenticated Website
Contract Manager
Cross Org Data Proxy User
Custom: Marketing Profile
Custom: Sales Profile
Custom: Support Profile
Customer Community Login User
Selected Profiles
System Administrator
javascript:void(0);

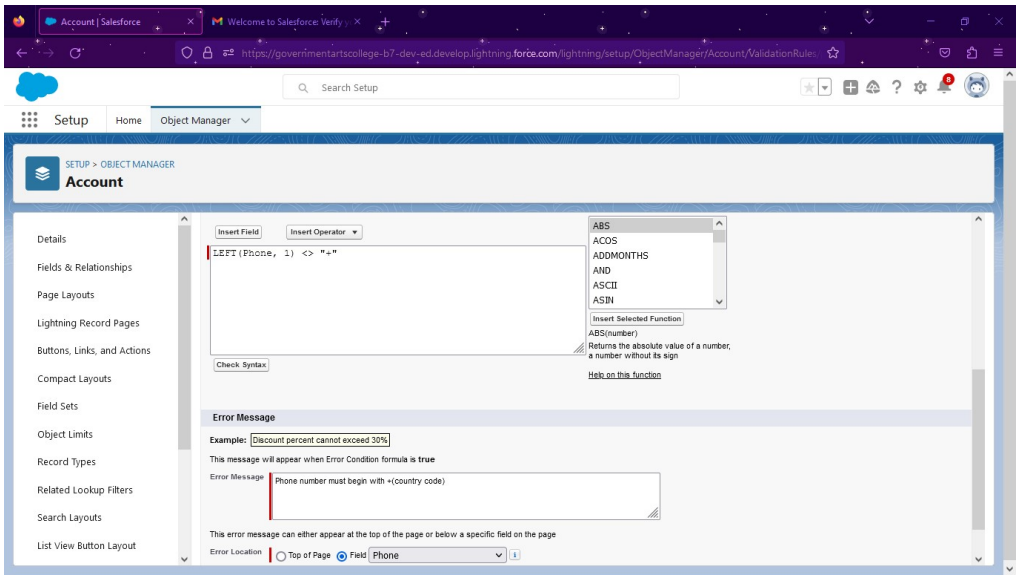

Tabs | Salesforce
Welcome to Salesforce: Verify
https://governmentartscollege-b7-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/home
Search Setup
Setup
Home
Object Manager
tab
User Interface
Loaded Console Tab Limit
Rename Tabs and Labels
Tabs
Didn't find what you're looking for?
Try using Global Search.
SETUP
Tabs
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
Edit | Del
Parents
Computer
Students
Star
Warehousets
Bridge
Web Tabs
No Web Tabs have been defined
Visualforce Tabs
No Visualforce Tabs have been defined

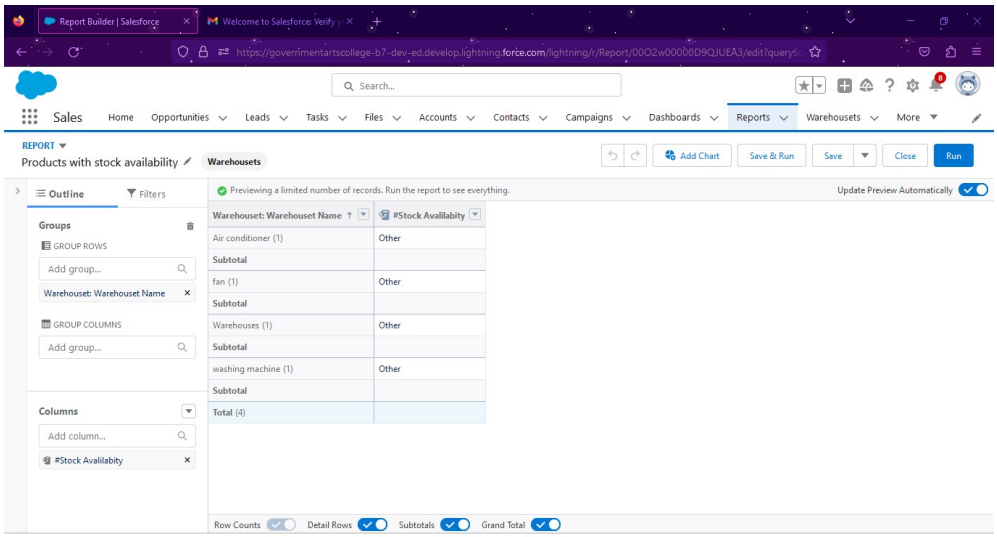

Users | Salesforce
Welcome to Salesforce: Verify
https://governmentartscollege-b7-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home
Search Setup
Setup
Home
Object Manager
user
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
User Interface
Action Link Templates
Actions & Recommendations
App Menu
Custom Labels
SETUP
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
New User
Reset Password(s)
Add Multiple Users
Action
Full Name
Alias
Username
Role
Active
Profile
Chatter Expert
Chatter
chatty.00d2w00000rkxzkead.9j4bo3ndrax0@chatter.salesforce.com
Chatter Free User
M. Surya
SM
suryam@govtartsclg.krishnagiri
System Administrator
M. Surya
SM
surya@6242.com
Standard Platform User
User, Integration
integ
integration@00d2w00000rkxzkead.com
Analytics Cloud Integration User
User, Security
sec
insightssecurity@00d2w00000rkxzkead.com
Analytics Cloud Security User

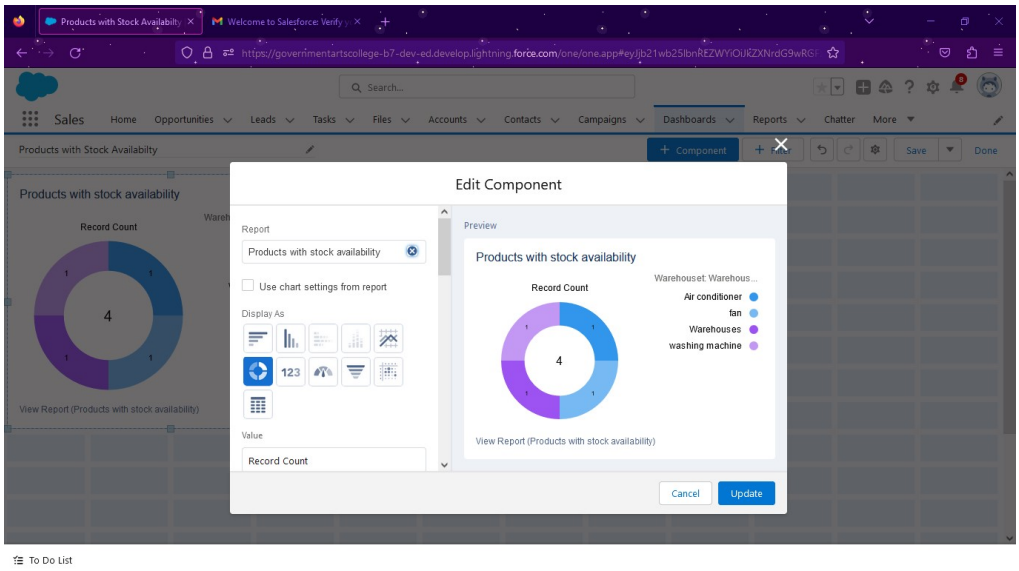

Users | Salesforce
Welcome to Salesforce: Verify
https://governmentartscollege-b7-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F0052v
Search Setup
Setup
Home
Object Manager
user
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
User Interface
Action Link Templates
Actions & Recommendations
App Menu
Custom Labels
SETUP
Users
User Edit
Surya M
Help for this Page
User Edit
Save
Save & New
Cancel
General Information
= Required Information
First Name
Surya
Last Name
M
Alias
SM
Email
suryamkptm@gmail.com
Username
surya@6242.com
Nickname
CRAZY-TJ
Title
Company
Department
Division
Role
<None Specified>
User License
Salesforce Platform
Profile
Standard Platform User
Active
Marketing User
Offline User
Knowledge User
Flow User
Service Cloud User
Site.com Contributor User
Site.com Publisher User
WDC User
Data.com User Type


Users | Salesforce
Welcome to Salesforce: Verify
https://governmentartscollege-b7-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F0052
Search Setup
Setup
Home
Object Manager
user
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
User Interface
Action Link Templates
Actions & Recommendations
App Menu
SETUP
Users
User Edit
Surya M
Help for this Page
User Edit
Save
Save & New
Cancel
General Information
= Required Information
First Name
Surya
Last Name
M
Alias
SM
Email
suryamkptm@gmail.com
Username
suryam@govtartsclg.kris
Nickname
User1678870387470493
Title
Company
Government Arts College
Department
Division
Role
<None Specified>
User License
Salesforce
Profile
System Administrator
Active
Marketing User
Offline User
Knowledge User
Flow User
Service Cloud User
Site.com Contributor User
Site.com Publisher User
WDC User
Data.com User Type
--None--


Account | Salesforce
Welcome to Salesforce: Verify
https://governmentartscollege-b7-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Account/ValidationRules
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Account
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
Account Validation Rule
Help for this Page
Define a validation rule by specifying an error condition and a corresponding error message. The error condition is written as a Boolean formula expression that returns true or false. When the formula expression returns true, the save will be aborted and the error message will be displayed. The user can correct the error and try again.
Validation Rule Edit
Save
Save & New
Cancel
Rule Name
Phone_number_has_international_format
Active
Description
Quick Tips
Operators & Functions
Error Condition Formula
= Required Information
Example:
Discount_Percent__c>0.30
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
Insert Field
Insert Operator
LEFT(Phone, 1) <> "+"
Functions
-- All Function Categories --
ABS
ACOS
ADDMONTHS
AND
ASCII


Account | Salesforce
Welcome to Salesforce: Verify
https://governmentartscollege-b7-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Account/ValidationRules
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Account
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
Insert Field
Insert Operator
LEFT(Phone, 1) <> "+"
Check Syntax
ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN
Insert Selected Function
ABS(number)
Returns the absolute value of a number, a number without its sign
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)
This error message can either appear at the top of the page or below a specific field on the page
Error Location
Top of Page
Field
Phone





Trailhead Profile Public URL

Team Lead : https://trailblazer.me/id/suryam6242
Team Member-1: https://trailblazer.me/id/perum21
TeamMember-2:

https://trailblazer.me/id/jjayaraman10

Team Member-3: https://trailblazer.me/id/jothm4

5 ADVANTAGES & DISADVANTAGE

Advantages	Disadvantages
Real Time Visibility And Reports.	High of cost.
Helps to Improve Business process automation.	Complexity.

Helps to manage inventory.	Integration issues.
Promotion and Loyalty offers.	Dependence on the internet.
Better Customer service.	Requires location.

6 APPLICATIONS

1) It can be used in marketing companies.
2) It can be used by retailers in some agencies.

7 CONCLUSION

Overall, while there are some potential drawbacks to using salesforce for retail management, the platform offers many benefits that can help retailers improve customer engagement, streamline their operations, and grow their business.

8 FUTURE SCOPE

Supervisory, client communication, merchandise shipment, sales, management, and administrative services are all options for candiates with a retail management background.