

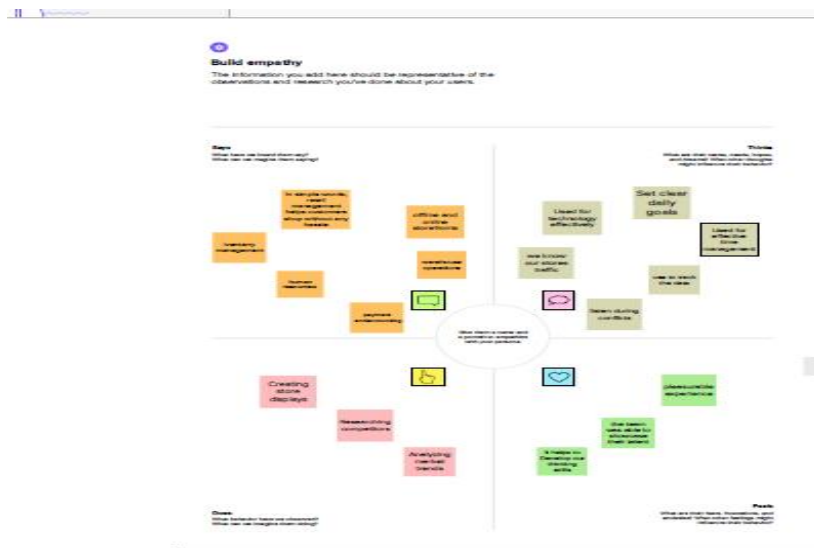
1. INTRODUCTION

❖ Overview

The process of helping customers find products in your store.

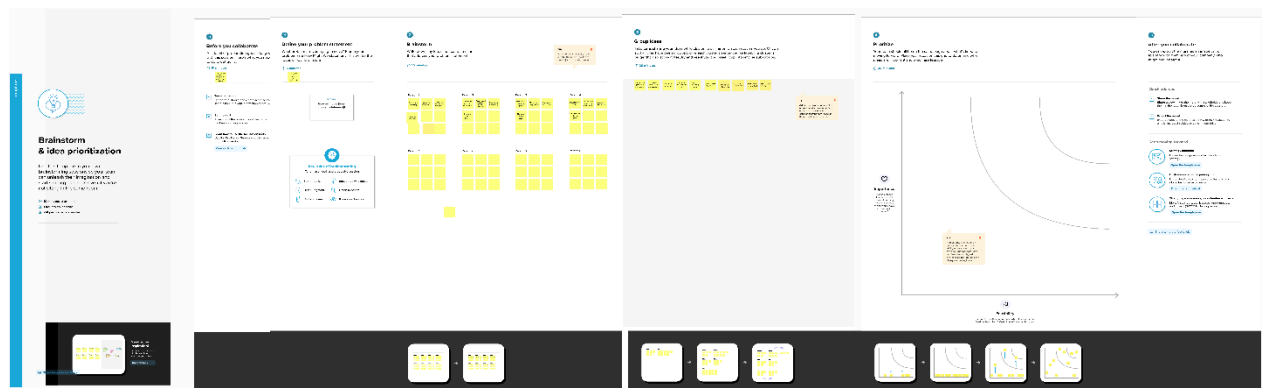
❖ Purpose

The use of this Retail Management. Come up with new idea that improved things.



2. Problem Definition & Design Thinking

Ideation and Brainstome map



3. RESULT

➤ Data Model:

Object name	Fields in the Object	
Customer	Field label	Data Type
	Customer	Auto Number
Tracking	Field Label	Data Type
	Tracking	Text
Warehouse	Field Label	Data Type
	Warehouse	Text

4. Activity & Screenshot

4.1 Creation of object Tracking

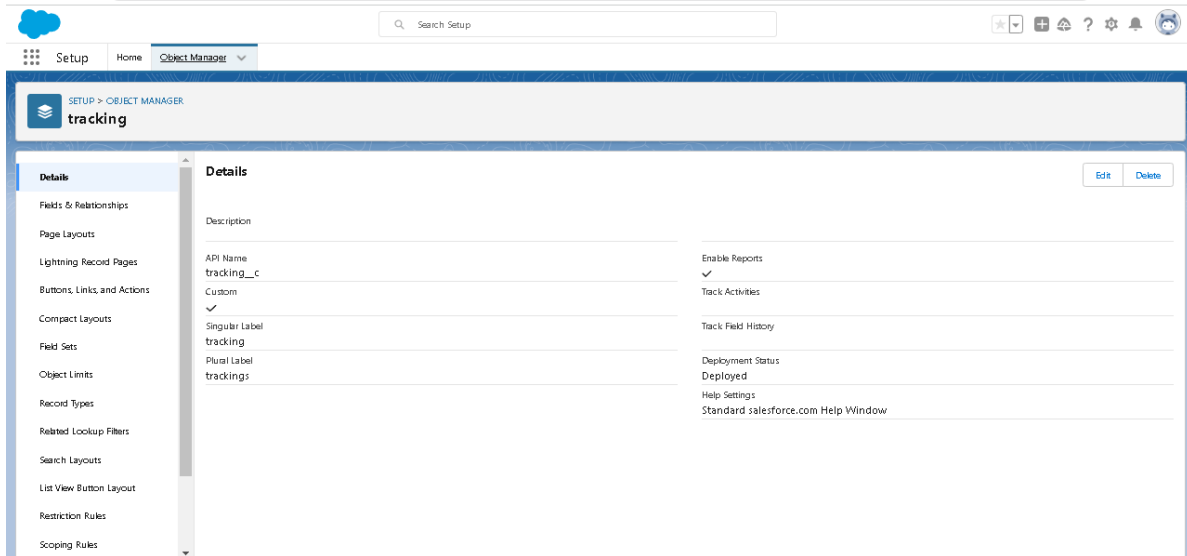
The screenshot shows the Salesforce Setup page, specifically the Object Manager section. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main content area is titled 'customer' and contains the following configuration details:

- Label:** customer (Example: Account)
- Plural Label:** customers (Example: Accounts)
- Starts with vowel sound:** ☐
- The Object Name is used when referencing the object via the API:** customer (Example: Account)
- Description:** MY NAME IS VISHWA
- Context-Sensitive help setting:** ☐ Open the standard Salesforce.com Help & Training window ☐ Open a window using a Visualforce page
- Context Name:** [None]
- Enter Record Name Label and Format:**
 - 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:** customer Name (Example: Account Name)
 - Data Type:** Auto Number
 - Display Format:** V-0000 (Example: A-0000 What Is This?)

1. Navigate to setup and select object manager.
2. At the top of the right side there you can find create custom object.
3. You will navigate to custom object definition edit where you have to give the object name.
4. The label name has Display/tracking and Plural label has Display/tracking.
5. The label name has Display/tracking and Plural label has Display/trackings.
6. In enter record name label and format enter name record name has Tracking ID.
7. And the data type has text.
8. In deployment status select deployed option.

9. Ensure that you have to select at least one option in the object creation option; it is available only once when a custom object is created.
10. Then click on next you will navigate to the new custom object tab where you have to select tab style and click on next.
11. After tab selection you will be navigated to add to profiles select default on click on next.
12. Thereafter you have to select a custom app select include tab so that object will be available in all objects and select save option.

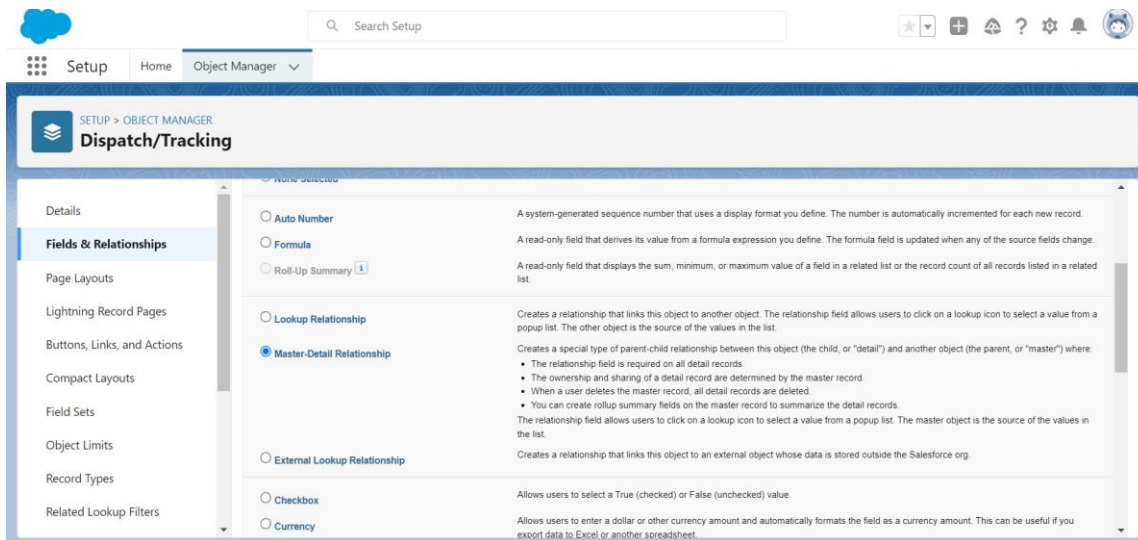
4.2 Creation of fields on Tracking



The screenshot shows the Salesforce Object Manager interface for the 'tracking' object. The left sidebar contains a 'Details' section with a list of configuration options: 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, and Scoping Rules. The main content area is titled 'tracking' and shows the 'Details' tab. It includes a 'Description' field, an 'API Name' field with the value 'tracking__c', a 'Custom' checkbox, and 'Singular Label' (tracking) and 'Plural Label' (trackings) fields. On the right, there are checkboxes for 'Enable Reports' (checked), 'Track Activities', and 'Track Field History'. Below these are 'Deployment Status' (Deployed) and a 'Help Settings' link pointing to 'Standard salesforce.com Help Window'. 'Edit' and 'Delete' buttons are in the top right corner.

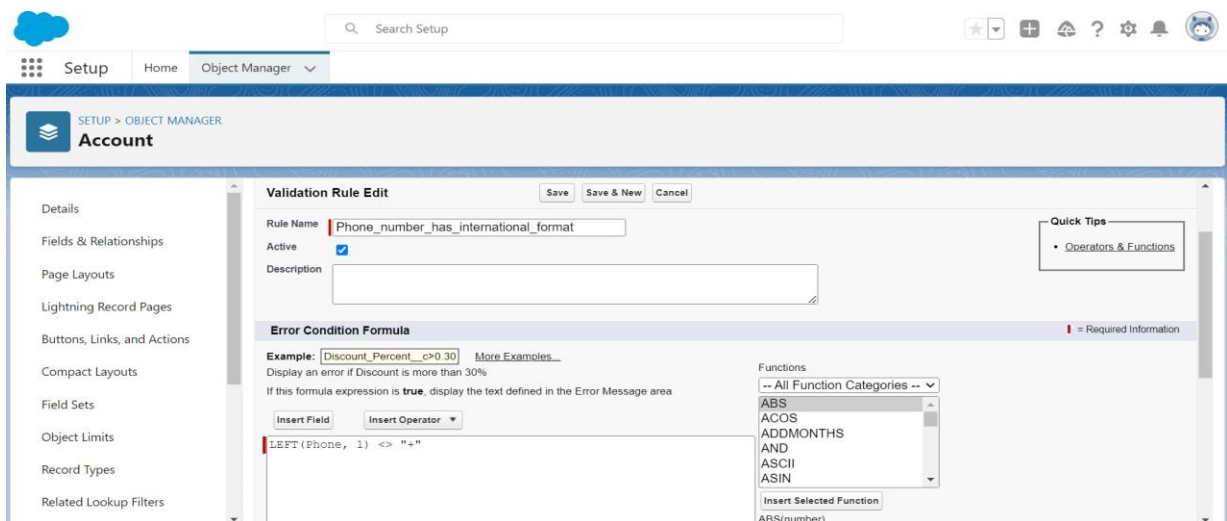
- 1) Select your object from object selection has Dispatch/Tracking.
- 2) And select the option fields and relationships.
- 3) Now you have to select data type, Checkbox Has data type.
- 4) And give the label name has Dispatched.
- 5) At the bottom of the object you can find options like required, unique, external id select required option so that always require a value in this field in order to save.
- 6) Click next you will navigate to field level security click on visible checkbox so that it is visible to all profiles
- 7) Select the next option, select the page layout and save it.

4.3 Creation of relation between objects



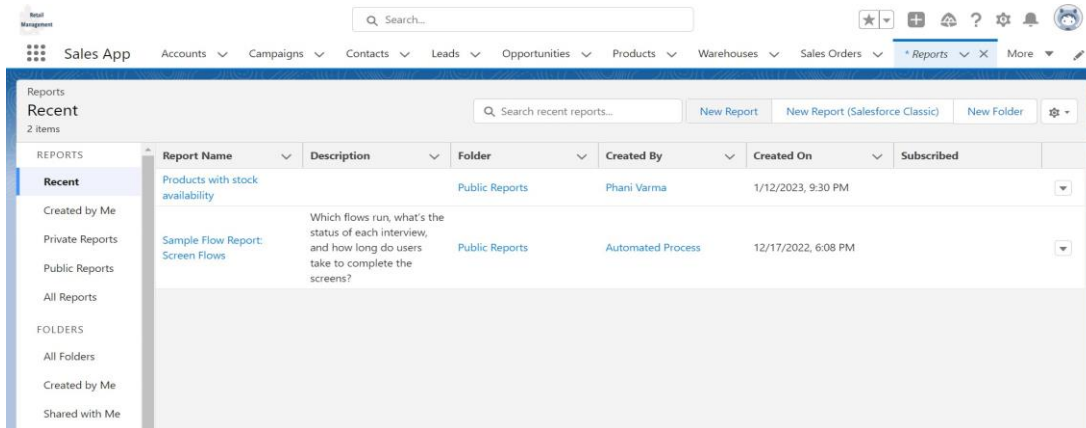
- 1) Go to the object manager and select 'Dispatch/tracking' object from the list.
- 2) And select fields and relationships and click on new.
- 3) Select the data type has Master detail relationship.
- 4) And select related to the object has sales order, and click on next.
- 5) You will navigate to the label name page where you give the label name for the field, give it has sales order and click next.
- 6) Select visible for all profiles in field level security and select page layout in next page and save

4.4 Creation of Validation rule

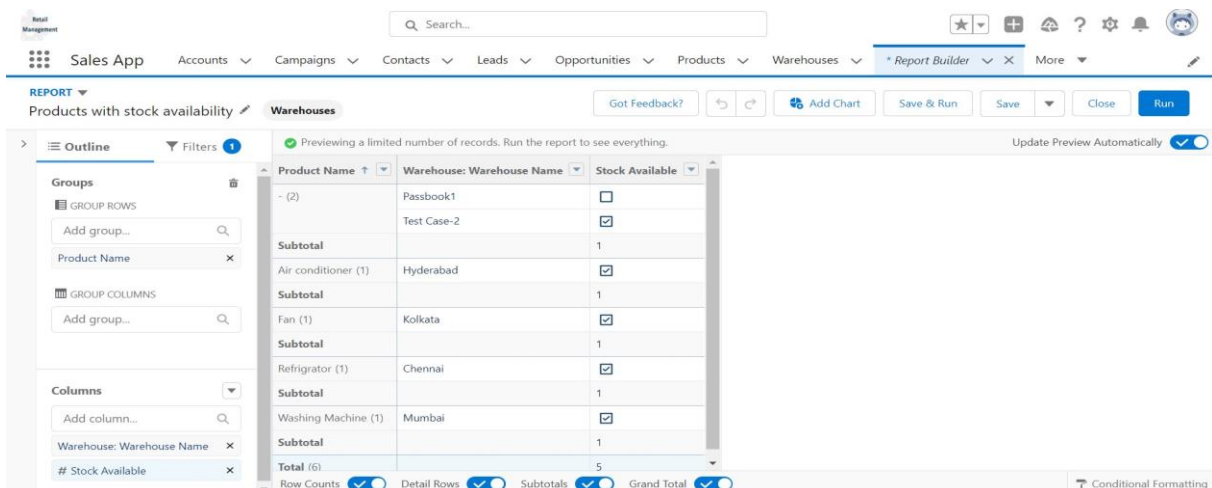


- 1) Click new, give the label name and in edit error conditional formula give the formula as `LEFT(Phone, 1) <> "+"`.
- 2) And in error message give the description as Phone number must begin with + (countrycode).
- 3) In error location select top of the field.

Reports

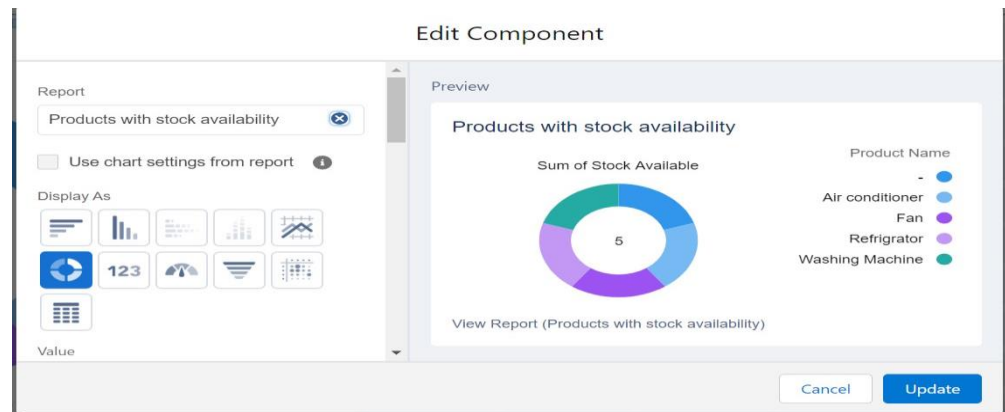


- 1) Click on the app launcher and search for reports.
- 2) And select a new report, for the record type category select other reports.
- 3) Select Warehouses for the report type name.
- 4) Select the start button to create a new report.



- 5) At the left side of the report you can find an outline pane.
- 6) In the group rows select Product name.
- 7) And in columns warehouse:warehouse name and stock available. Now navigate to the filter pane available next to the outline pane and ensure in the show me section all my warehouses is selected.
- 8) And in the warehouse created date select all time.
- 9) And give the label name products with stock availability.
- 10) Click on save and run for saving the report.

Dashboards



- 1) Name the dashboard has a products with stock availability.
- 2) And select create option.
- 3) Now click on Add component and for report select passport with locations.
- 4) Select the donut chart in display as section.

5. Trailhead Profile Public URL

Team Lead – <https://trailblazer.me/id/vishwa2004>

Team Member 1 - <https://trailblazer.me/id/yoga2003>

Team Member 2 - <https://trailblazer.me/id/vinothini2003>

Team Member 3 - <https://trailblazer.me/id/shruthi2002>

Team Member 4 - <https://trailblazer.me/id/vijila2002>

ADVANTAGES

- The retailer must keep a record of all the products coming into the store.
- The products must be well arranged on the assigned shelves according to size, colour, gender, patterns etc.

DISADVANTAGES

- You have to pay for add ons to get the most out of the software.
- Configuration and setup is complex and time-consuming.

- Cluttered inference makes navigation and simple tasks unnecessarily complex.
- Customer support has a poor reputation.

APPLICATIONS

- Unify marketing commerce, service and IT data on one connected retail platform.
- Engage customers, win loyalty and support associatives.
- Use commerce cloud to turn shoppers into buyers, faster.
- Personalise every path-to-purchase with marketing cloud.

CONCLUSION

- Salesforce for retail is a set of solutions. Build on the salesforce platform designed to help retail companies manage their operations and customer relationship.

FUTURE SCOPE

- The retail sector in the country is currently booming, providing plenty of career prospects for people with passion for sales marketplaces, business diversification, campaigning, advertising, market research and segmentation.
- Retail Management has become one of the fastest growing occupations in the industry as the economy has grown significantly.