

# RETAIL MANAGEMENT APPLICATION USING SALESFORCE

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PROJECT REPORT

# RETAIL MANAGEMENT APPLICATION USING SALESFORCE

## 1) INTRODUCTION:

### 1.1 OVERVIEW:

Retailing encompasses the business activities involved in selling goods and services to consumers for their personal, family, or household etc. A CRM product owner has requested to create two applications, one is a sales app for sales reps to use this application and store customers data, and the second application is a service app for service reps/agents to provide support to customers in dealing cases. To generate business on top of the customers.

#### ❖ CREATE DEVELOPER ACCOUNT:

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers. Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

#### ❖ CREATION OF OBJECTS AND FIELDS:

Objects are database tables that permit you to store data that is specific to an organization. Salesforce objects are of two types:

- 1) Standard objects
- 2) Custom objects

#### ❖ CREATING RELATIONSHIPS BETWEEN OBJECTS:

Object relationships are special field types that connect two objects. As a crm product owner create relationships to link objects with each other, so that when users view records, they can also see related data.

#### ❖ CREATION OF APPLICATION:

Apps in Salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo, and a particular An app is a collection of items that work together to serve a particular function. Salesforce apps come in two flavors: Classic and Lightning.

#### ❖ CREATION OF PAGE LAYOUTS:

Page layouts control the layout of an object, As a CRM product owner create custom page layouts which defines which fields the user can view and edit while entering data in objects and must contain different sets of fields and related lists.

Custom Page layouts

- 1) Warehouse page layout
- 2) Sales order layout
- 3) Dispatch/Tracking layout.

#### ❖ CREATING USER:

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account.

#### ❖ CREATION OF VALIDATION RULES:

Validation rules verify that the data a user enters in a record meets the standards you specify before the user can save the record. As a CRM product owner they requested to create a validation rule on account object on the phone field.

#### ❖ CREATION OF CROSS OBJECTS:

Using an object formula lets you reference merge fields on a master object from a master detail relationship on the detail object. As a CRM product owner they wants to save user's clicks and displays contacts' parent accounts website value on the contact record so users do not have to click on the account to find the website.

#### ❖ CREATION OF REPORTS:

A report is a list of records that meet the criteria you define. It's displayed in Salesforce in rows and columns, and can be filtered, grouped, or displayed in a graphical chart. Every report is stored in a folder. Folders can be public, hidden, or shared, and can be set to read-only or read/write.

#### ❖ CREATION OF DASHBOARDS:

Dashboards in Salesforce are a graphical representation of Reports. It shows data from source reports as visual components.

### 1.2 PURPOSE:

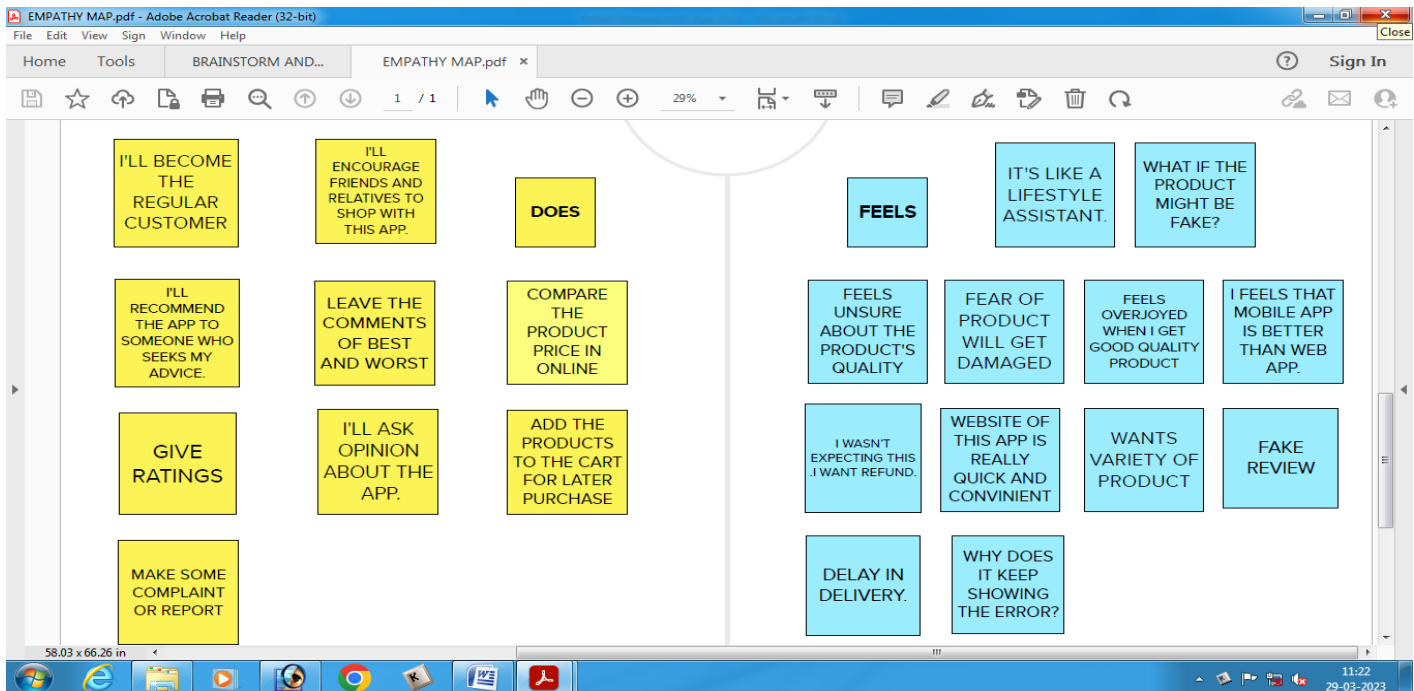
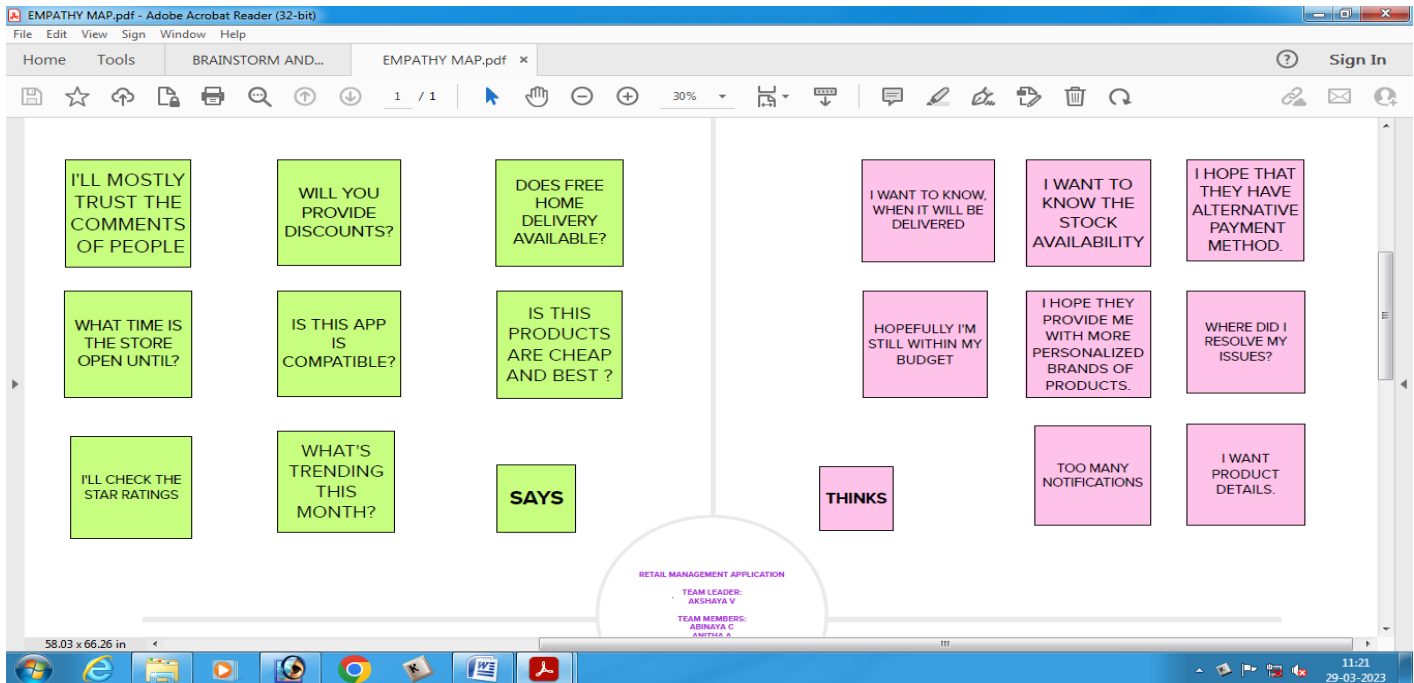
These apps help sellers build great customer relationships, stay up-to-date with important information, and respond to their customers faster.

It helps sellers with the right data anywhere, anytime, and lets them log and share information quickly.

Sales apps allow reps to save time, simplify daily workflow, and access up-to-date data no matter where they are or what device they're using. With more time available to focus on sales, agents can actually, you know, sell.

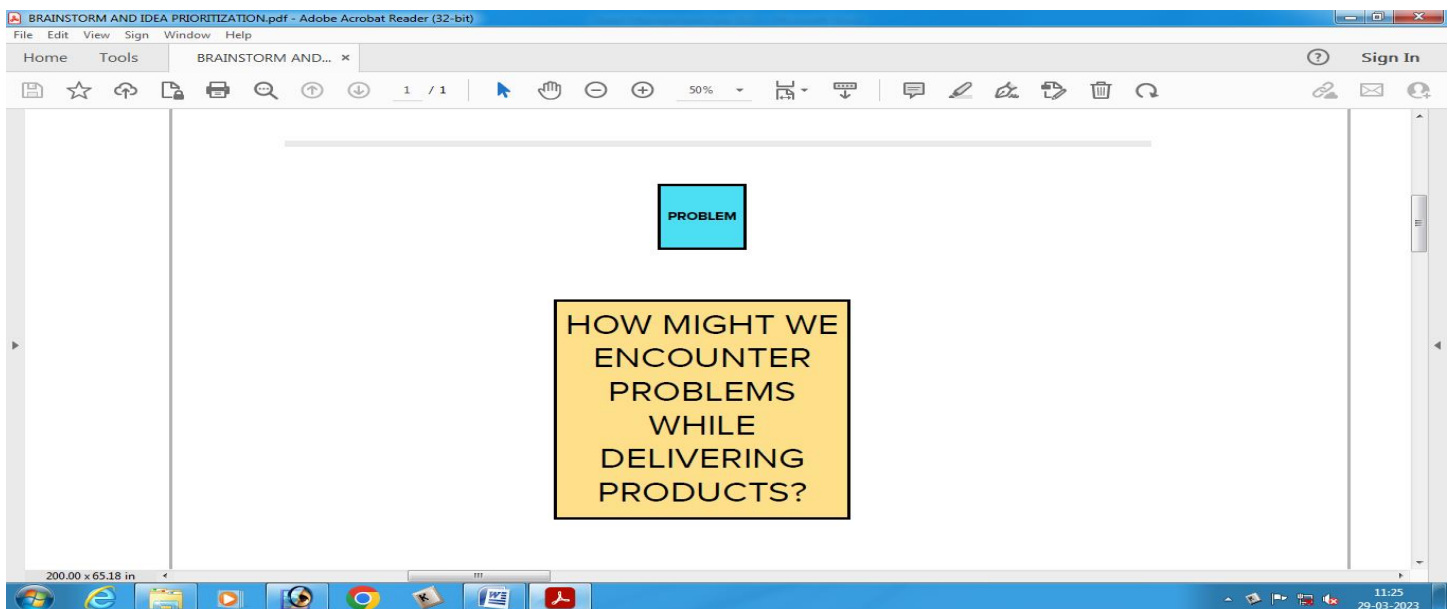
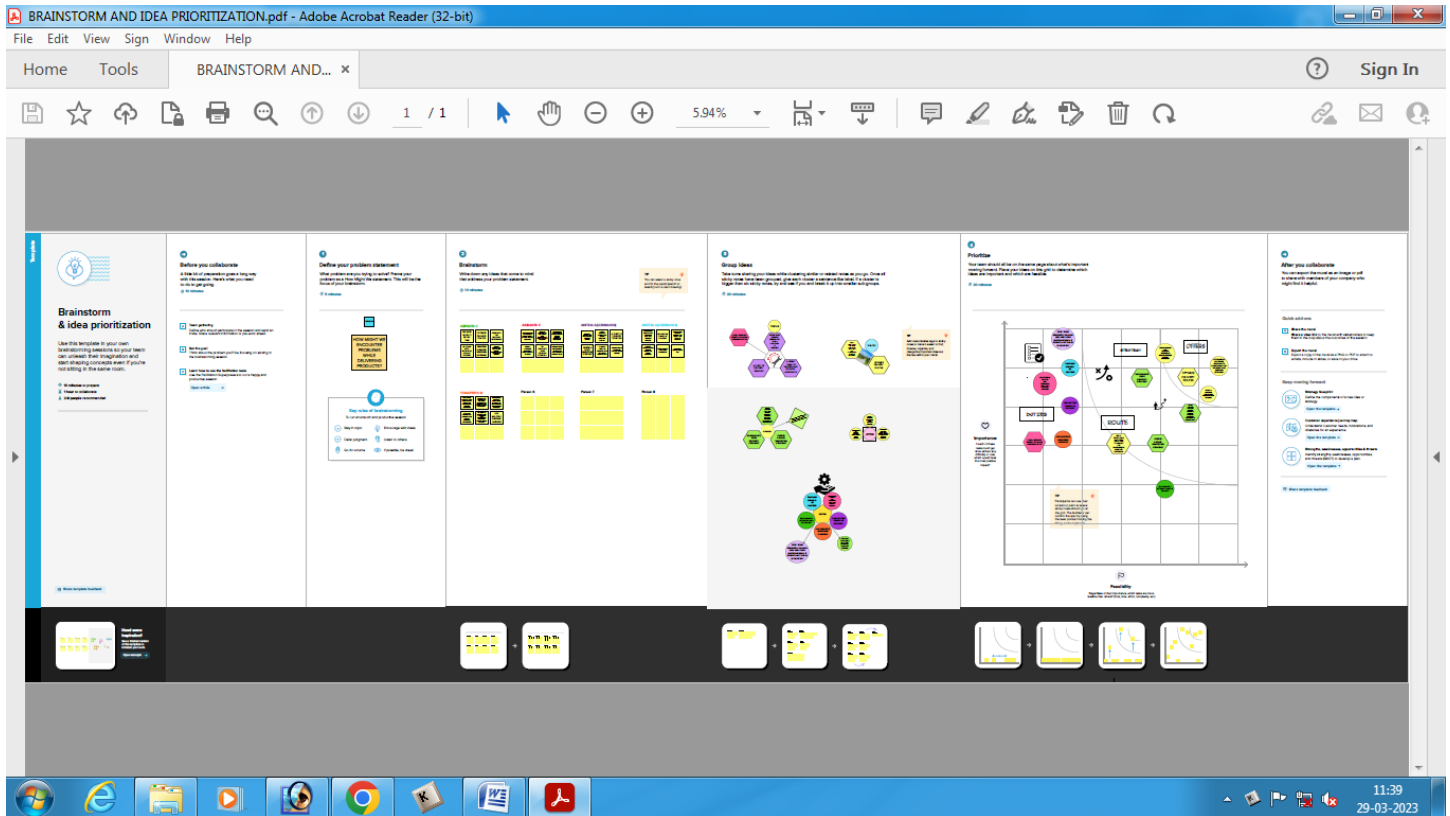
## 2) PROBLEM DEFINITION AND DESIGN THINKING:

### 2.1 EMPATHY MAP:





## 2.2 IDEATION AND BRAINSTORMING MAP:



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**ABINAYA C**

- PACKAGE SHOULD BE ON-TIME
- OPTIMIZE DELIVERY ROUTES
- PERSONIFY THE DELIVERY EXPERIENCE
- BE CLEAR WITH ESTIMATED DATA OF DELIVERY
- PROVIDE CONCISE SHIPPING OPTIONS
- OUTDATED ADDRESSES THAT LEAD TO FAILED DELIVERY ATTEMPTS, ASK THEM FOR REGULAR UPDATION

**AKSHAYA V**

- OFFER FREE ONE DAY DELIVERY MAKING IMPACT IN THEIR FUTURE DECISIONS
- KEEP THEM INFORMED VIA MAIL, SMS AND PUSH NOTIFICATIONS, IF THERE'S ANY DELAY IN DELIVERY
- ASSESS SHIPPING COST AND BUDGET SUPPORTS SHIPPING STRATEGY INITIATIVES ACCORDING TO FIXED METRICS
- OFFER A SUPERIOR EXPERIENCE POST-SHIPMENT DELIVERY
- RE-EVALUATE YOUR DELIVERY STRATEGY
- PROVIDE TOOLS FOR CHASEUP THE ISSUE TO THE CUSTOMER COURIER TEAM

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**ANITHA A(U20MA003)**

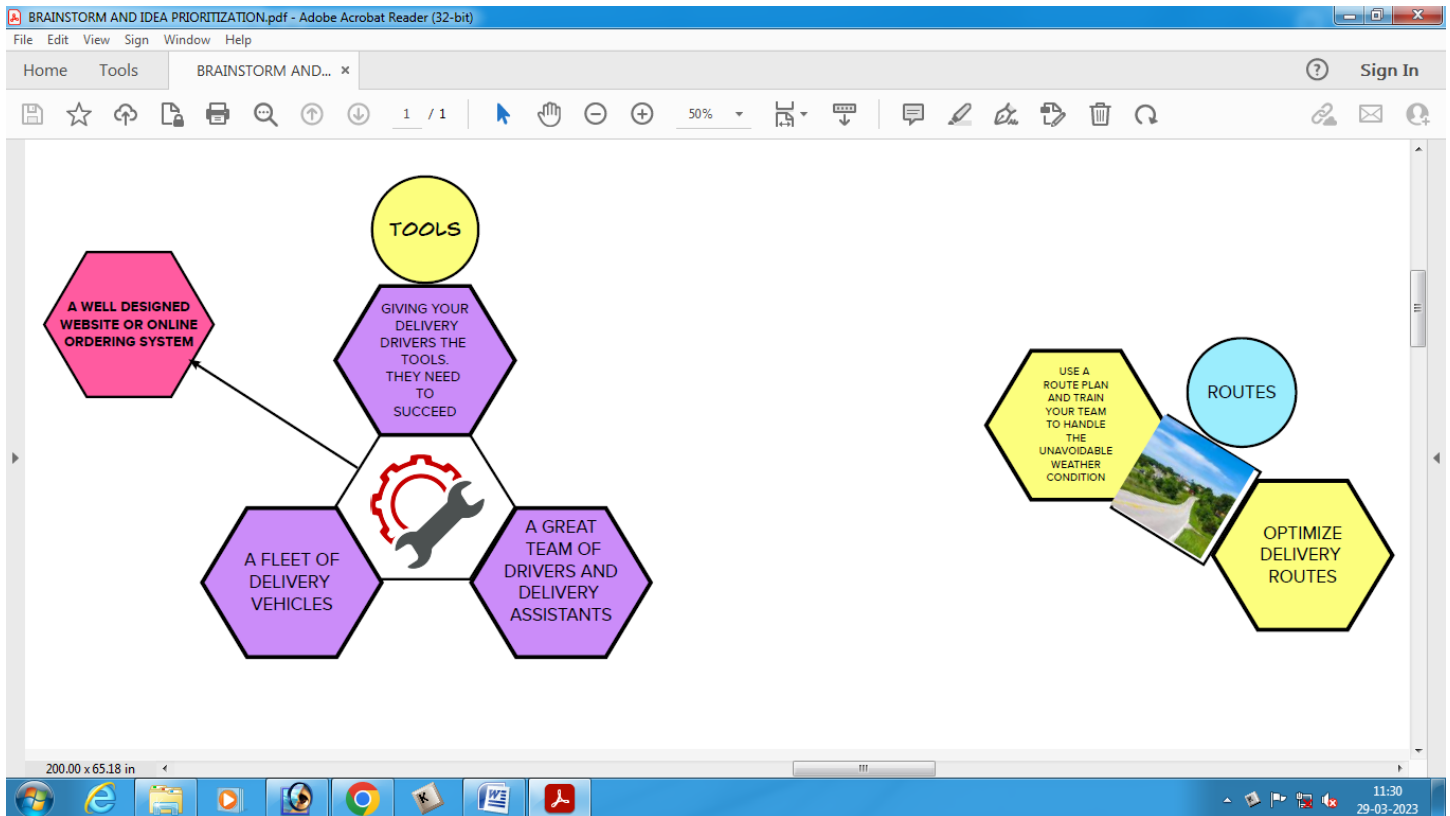
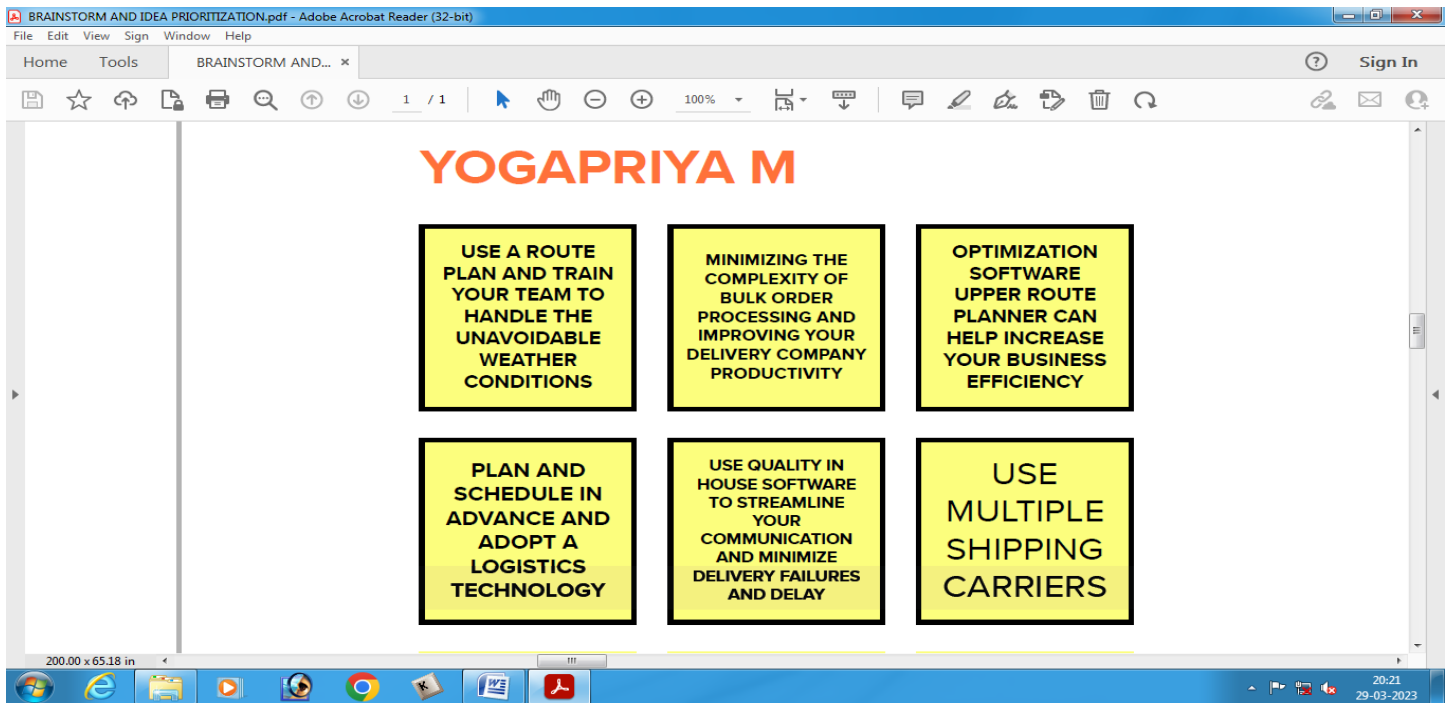
- PROVIDE A RELIABLE AND FAST WORKING DELIVERY SERVICE
- A WELL DESIGNED WEBSITE OR ONLINE ORDERING SYSTEM
- A FLEET OF DELIVERY VEHICLES
- PREFER A SOLID MARKETING STRATEGY
- A GREAT TEAM OF DRIVERS AND DELIVERY ASSISTANTS
- A COMMITMENT TO QUALITY AND CUSTOMER SERVICE

**ANITHA A(U20MA004)**

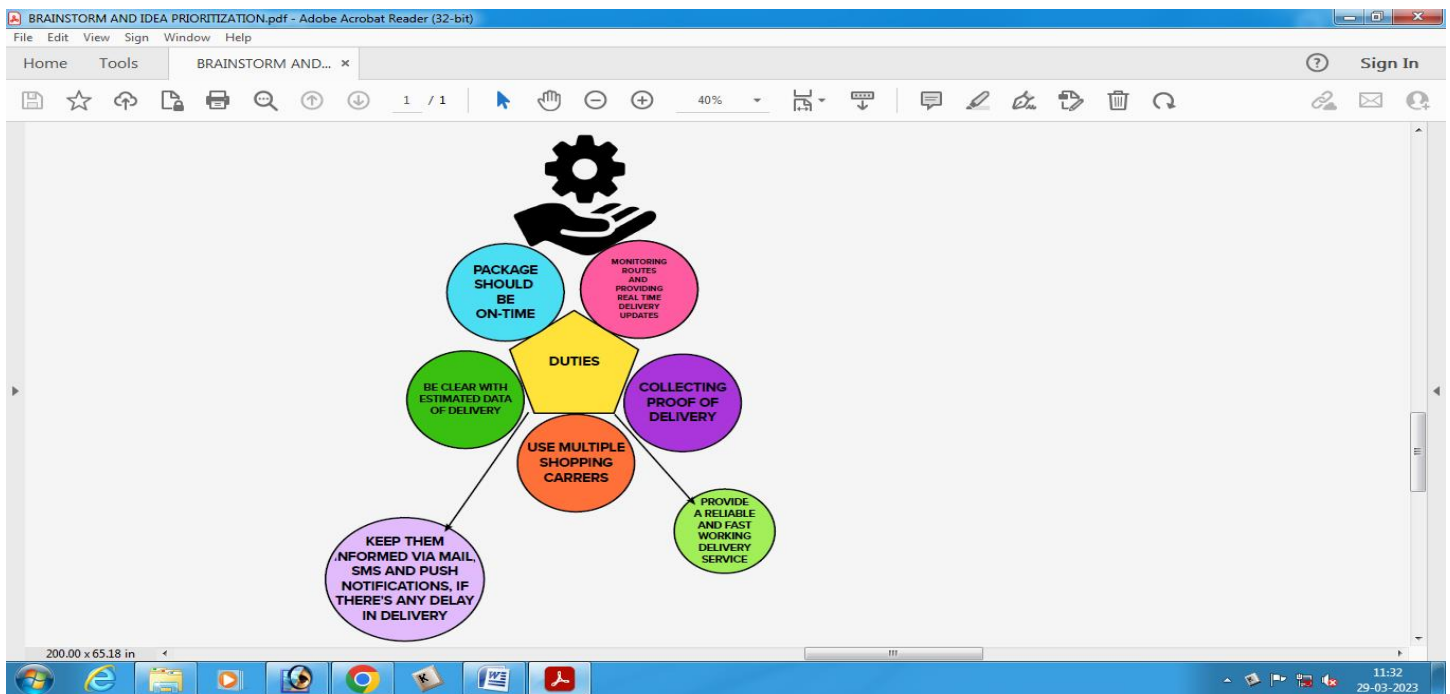
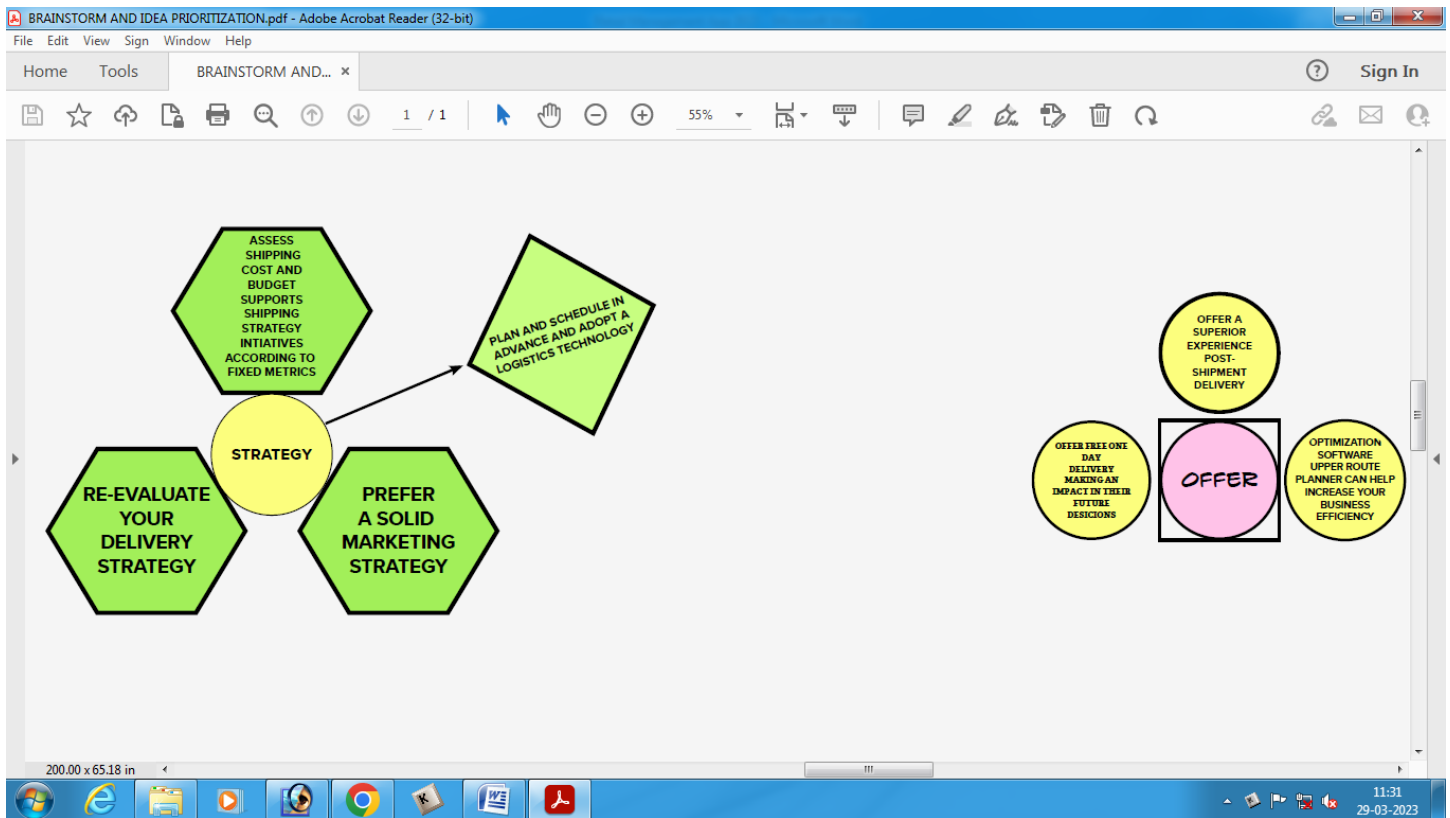
- MONITORING ROUTES AND PROVIDING REAL TIME DELIVERY UPDATES
- COLLECTING PROOF OF DELIVERY
- GIVING YOUR DELIVERY DRIVERS. THE TOOLS THEY NEED TO SUCCEED
- ALWAYS DISPATCH YOUR ORDERS BEFORE THE PUBLIC HOLIDAYS.
- COMMUNICATE WITH YOUR CUSTOMERS
- SET MINIMUM / MAXIMUM DELIVERY TIME

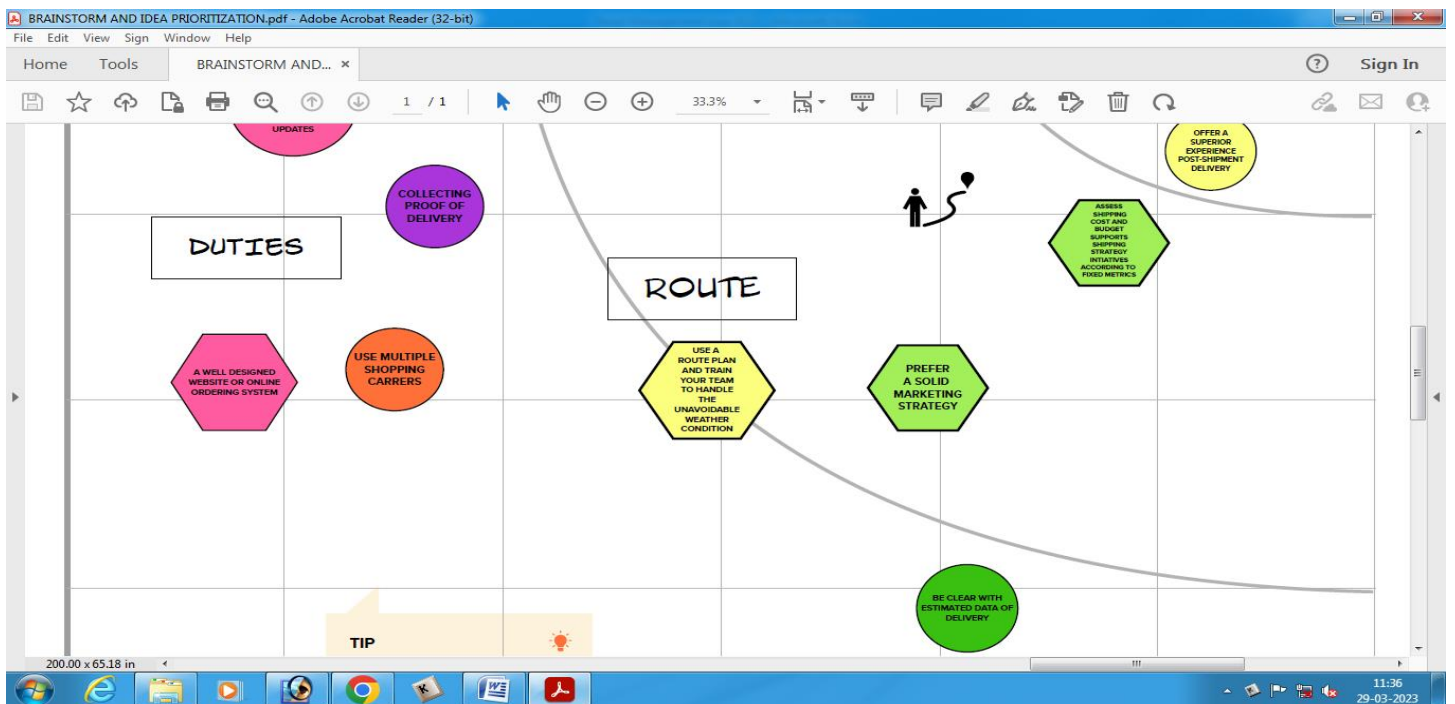
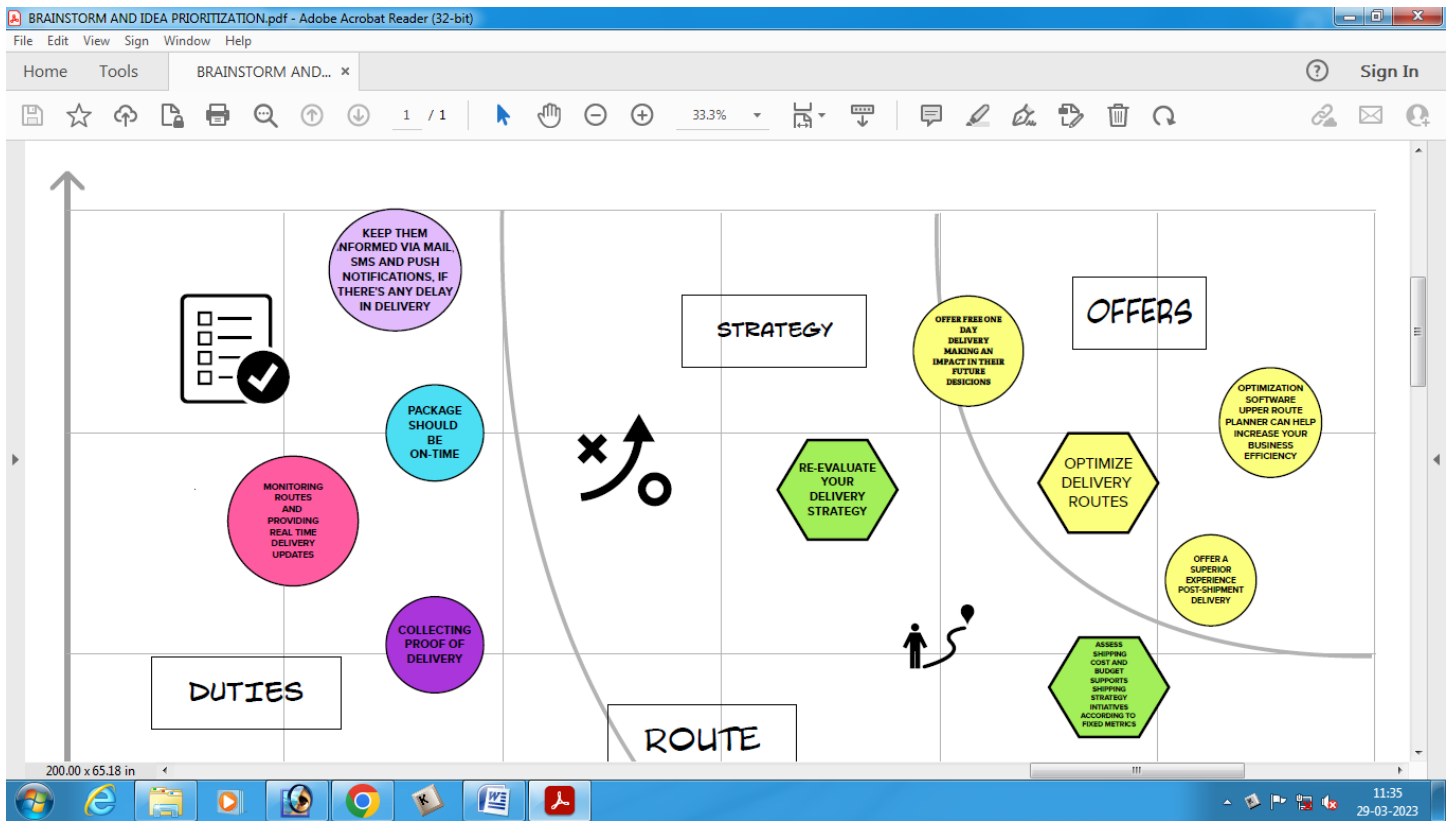
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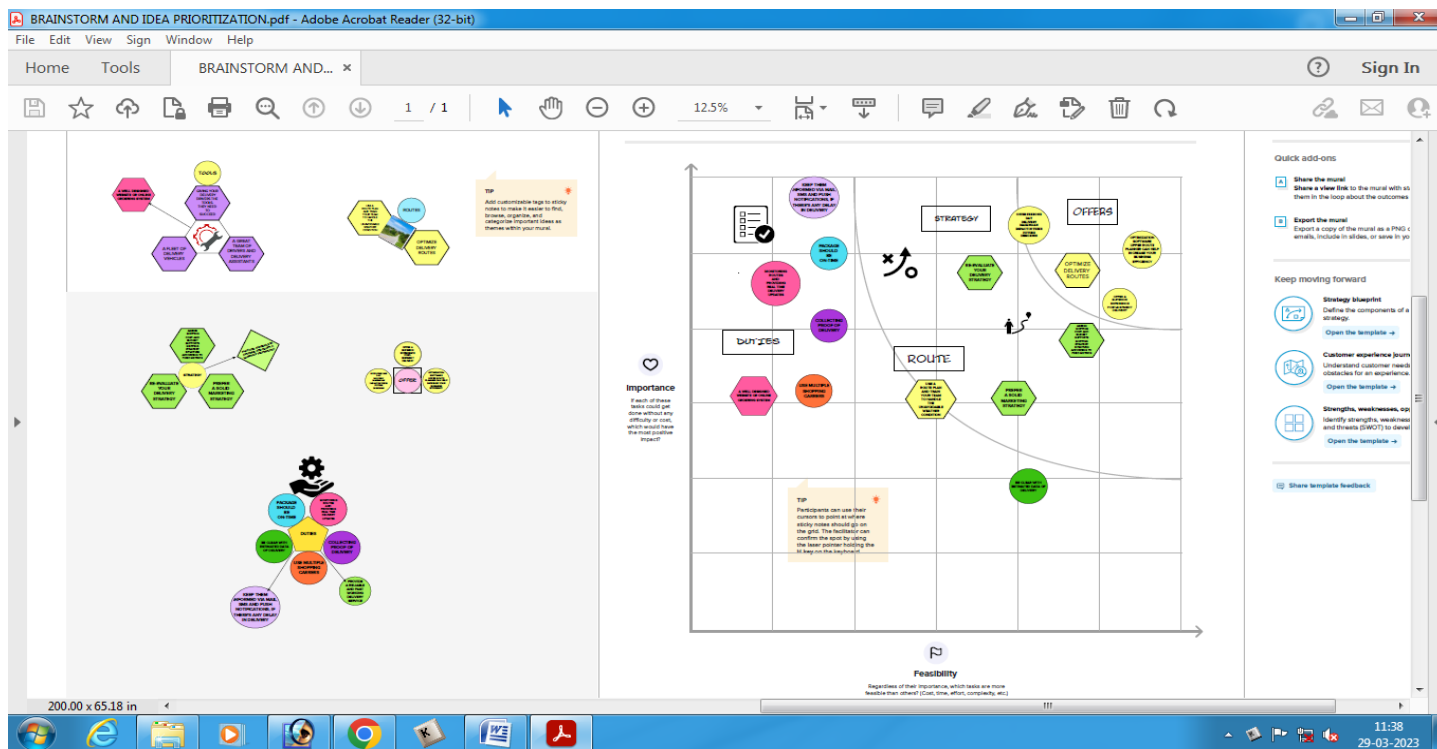
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### 3) RESULT:

## PRODUCTS WITH STOCK AVAILABILITY(REPORT):

Report: Products with Warehouses		
Products with stock availability		
Total Records	Total Stock available	
6	5	
Products Product Name	Warehouse Warehouse Name	Stock available
- (2)	Passbook1	<input type="checkbox"/>
	Test Case-2	<input checked="" type="checkbox"/>
Subtotal		1
Air Conditioner (1)	Hyderabad	<input checked="" type="checkbox"/>
Subtotal		1
Fan (1)	Kolkata	<input checked="" type="checkbox"/>
Subtotal		1
Refrigerator (1)	Chennai	<input checked="" type="checkbox"/>
Subtotal		1
Washing Machine (1)	Mumbai	<input checked="" type="checkbox"/>
Subtotal		1
Total (6)		5

## PRODUCTS WITH STOCK AVAILABILITY(DASHBOARD):



## 4) ADVANTAGES AND DISADVANTAGES:

### ADVANTAGES:

- + **Plan your day:** Before you start your day, you want to see what it has in store. You can immediately see reminders about your customer meetings or insights for the day.
- + **Do post-meeting work:** After you're out of a meeting, you can quickly add notes, create contacts, and update data in relevant records.
- + **Find required information and act accordingly:** Find a contact you want to reach out to with ease, or find the recent records you worked on.
- + **The mobile app allows your sales team to address customer needs quickly.**
- + **A Sales app boosts inventory:** Sales representatives can use real-time inventory data to determine where things are at any time. Suppose the rep can show the customer that your company can deliver desired items promptly. In that case, the customer can take the next step to place the order confidently.
- + **It provides instant access to product information.**
- + **It allows your sales team to do business from anywhere.**

- ✚ **Staff interaction** – information can be passed quickly and easily to staff whether for those accessing an internal company portal or people working in remote locations.
- ✚ **Productivity** – app-based interactions can streamline communications with staff and outside contractors. And then you can ditch labour intensive paper-based reporting.
- ✚ You can add/remove features to suit your needs
- ✚ As the most popular CRM platform, it's easy to find sales reps who know how to use the software

## DISADVANTAGES:

- ✚ **Lack of focus** – Simply 'having an app' for the sake of it could prove counter-productive and a waste of financial resources: it's vital to know exactly what you want your app to achieve and have a business case to support
- ✚ **Updating** – your app will require regular updates in line with revisions from platform providers
- ✚ Configuration and setup is complex and time-consuming
- ✚ Customer support has a poor reputation.
- ✚ It is expensive and has implicit costs.

## 5) APPLICATIONS:

- ✚ Sales apps save time. Whatever it's primary function — whether it's task management, expense tracking, or customer relationship management — a sales app's ultimate purpose is to make room in your day so you can make more sales and maintain strong customer relationships.
- ✚ **Quick Access to Company's Data:** Accessing information is one of the major challenges sales reps face while on the field. Although most businesses now make use of sales CRM, getting real-time data is yet a challenge as the CRM system is typically stored in the office. How do you juggle information about several clients, business inventory, updated price, and proposals outside the office? That is where sales rep apps like mobile CRMs come into play. With this app, your sales reps can gain uninterrupted access to every info on your database, making it so much easier to win prospects and close deals while on the field.
- ✚ **Better Customer Relationship:** Customers today no longer want to be bought. They want you to prove you are worth dealing with. Are you reliable? Do you care about your customers? How is your customer service? Thanks to sales rep apps, you now have a log of customer's history on your phone. You can quickly check the details of your last meeting, what the customer needs, the product or services he is interested in, and maybe

the challenges he is facing at the time. So, you do not go there unprepared, asking funny questions or looking literally dumb to the client.

- ✚ **Insightful Planning:** Following up with prospects and clients can be pretty overwhelming. There is a lot to keep track of. In fact, it may seem impossible for your sales team to keep tabs on prospects and clients as the firm grows. Well, it doesn't have to be a soul-wrenching task. Mobile CRM apps are equipped with a function that allows sales reps to easily plan their day and track their clients. The app helps you to maximize your time and resources by telling you who to visit and where to visit them. You can follow through with as many prospects as possible with the automated planner.
- ✚ **Stronger Team Relationship:** Communication among members of a sales team is very critical to the success of any project. And having everyone dispatched to different locations/ tasks can make it really difficult for sales reps to stay in touch. Fortunately, sales rep apps are designed to mitigate this pitfall by providing team members with the opportunity to communicate with others right on the field. Better communication has been proven to greatly minimize errors while maximizing the team's effectiveness.
- ✚ **Increased Productivity:** This point sums up all the individual benefits of sales rep apps – increased productivity. Having easy access to customers' data, calendar, schedules, reminders, automated plans, etc., all contribute to enhancing the productivity of your sales team. You will be amazed at how much faster and easier it is to push prospects through the sales funnel with these life-saving apps. Give it a try!

## 6) CONCLUSION:

The sales report app is a useful app for sales directors to review performance across different criteria. The app user can see the monthly performance by product, sales person and the overall sales performance by month and quarter. The user can also filter items out of the chart for a drill-down view by month or product. The app uses Deck View as a "Table of Contents" to link to Stock Available and Product Name. This helps users to better navigate apps that have list of products. The app also sends out scheduled emails on the whole team's quarterly sales data and on a specific sales rep's performance.

## 7) FUTURE SCOPE:

- ✚ The future of mobile app development is exciting and full of potential. **With the rise of AI and ML, cross-platform development, progressive web apps, the Internet of Things, and 5G,** developers have the tools they need to create truly innovative and transformative mobile apps that can change the way we live and work.
- ✚ **Mobile payment Support:** A mobile-based payment facility or mobile wallets is a great demand in the online shopping process. It creates maximum convenience for buyers and retailer owners in two ways. It helps customers to pay for their purchased goods immediately without any cash shortage at mortar and brick stores or



via online shopping by integrating their credit card information through the app. It can support retailer business revenue growth by providing the ability for their customers to purchase products instantly through apps with in-built mobile payment technology.

- ✚ Sales applications provide a great platform for the retailers and e-Commerce company owners to expand their business.
- ✚ One more benefit that Sales application offers is the advertisement opportunity. It is quite sensible to spend more money on ecommerce app development than to spend on any other billboard.
- ✚ Personalization is an effective way to boost sales as it makes a customer feel valued. The customer feels that the service provider really cares for what they are purchasing.

## 8) APPENDIX:



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PROJECT MANUAL-