

RETAIL MANAGEMENT APPLICATION USING SALESFORCE

1.INTRODUCTION

1.1. OVERVIEW

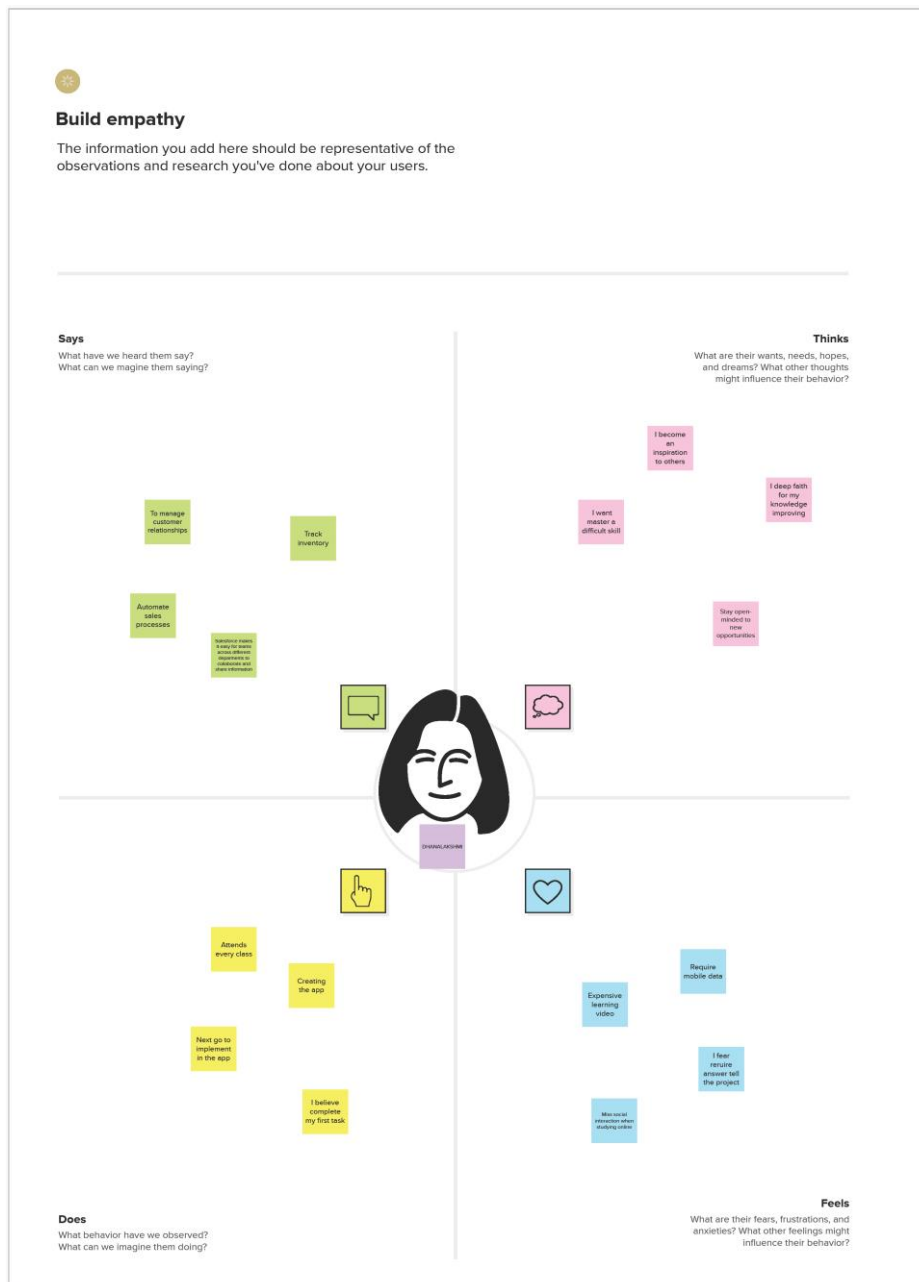
Retailing encompasses the business activities involved in selling goods and services to consumers for their personal, family, or household etc. A CRM product owner has requested to create two applications, one is a sales app for sales reps to use this application and store customers data, and the second 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.

1.2.PURPOSE

Retail management optimizes internal processes such as inventory management, offline and online storefronts, warehouse operations, payment and accounting, and human resources.

2. PROBLEM DEFINING AND DESIGN THINKING

2.1. EMPATHY MAP



2.2. BRAINSTORMING AND IDEATION

1

Define your problem statement

What problem are you trying to solve? Frame your problem as a how might we statement. This will be the focus of your brainstorm.

5 minutes

PROBLEM

How might we create an app for Social Management?

Key rules of brainstorming

To ensure smooth and productive session

Stay on topic.

Encourage wild ideas.

Defer judgment.

Liberty to affirm.

Go for volume.

If possible, be visual.

2

Brainstorm

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

10 minutes

DISCUSS/SHARE P

DISCUSS/SHARE S

MICHAEL/DEB/ANTHONY

EMILY M

3

Group ideas

Use this space to group similar ideas from the brainstorm. Each group should have a title that describes what the ideas have in common. If a group is bigger than six sticky notes, try and see if you can break it up into smaller sub-groups.

20 minutes

ACCOUNTS

COMPLAINTS

ESTABLISH TRUST

LEADS

4

Prioritize

Your team should all be on the same page about what's important moving forward. Place your ideas on this grid to determine which ideas are important and which are feasible.

20 minutes

Importance

Feasibility

72

Keep ideas that represent what is both on time, feasible and desired (Yes, the Affix, certainly, etc.)

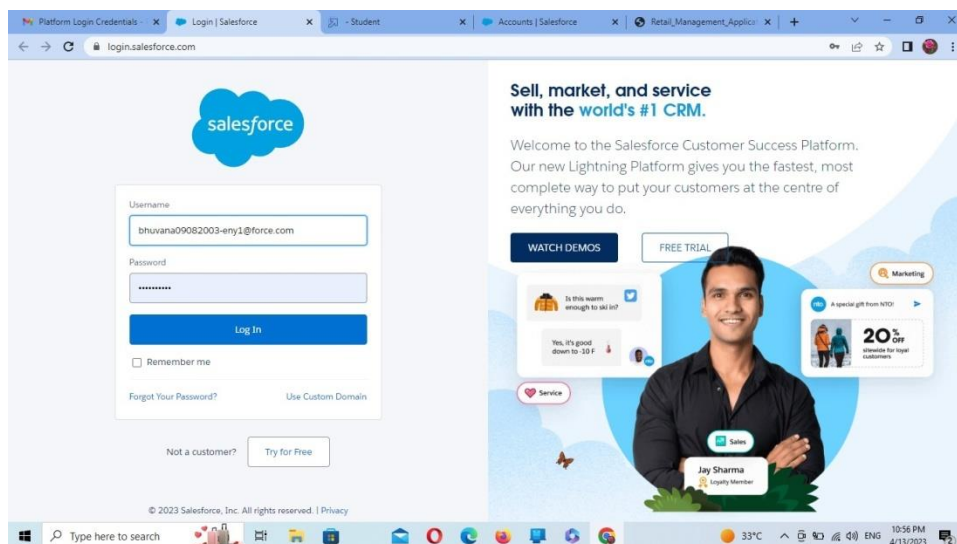
3.RESULTS

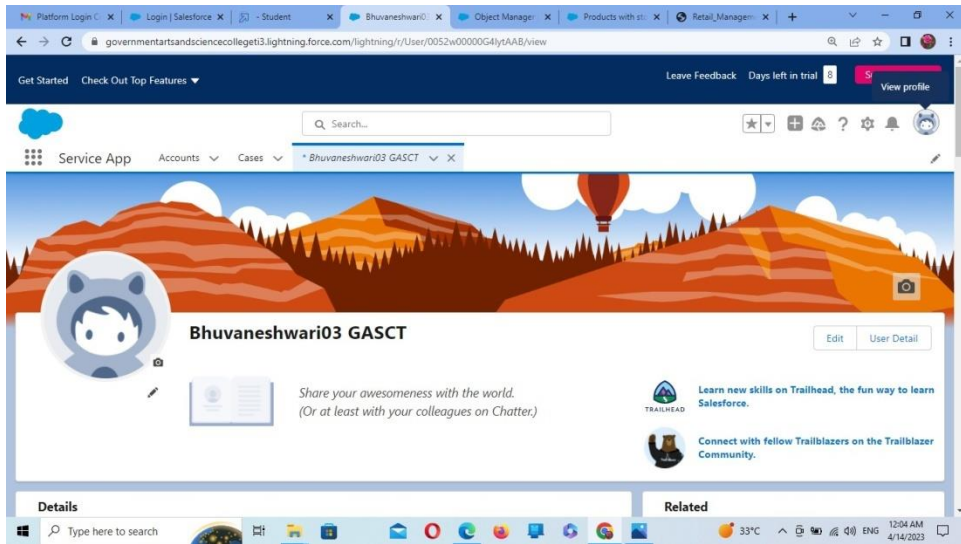
3.1.DATA MODEL

OBJECT	FIELDS IN THE OBJECT	
Campaign	Field	Data type
	Campaign Name	Text
Leads		
Accounts		
contacts	Field	Data type
	Account Website	Formula
opportunities		
products		
Warehouse		
Cases		
Dispatch/Tracking	Field	Data type
	Dispatched	Checkbox
	Date of Delivery	Checkbox
	Tracking ID	Checkbox
	Sales Order	Checkbox

3.2.ACTIVITY AND SCREENSHOTS

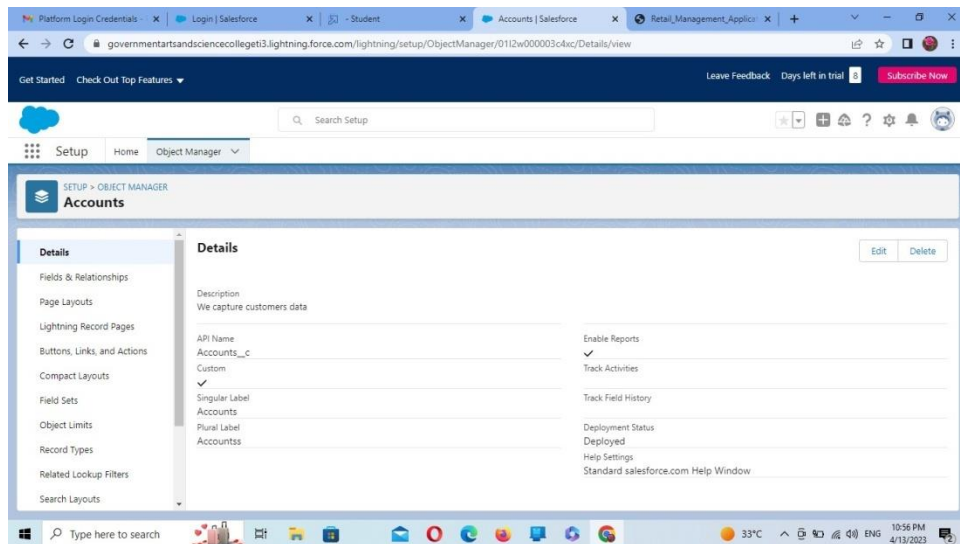
3.2.1.Creating Salesforce Account



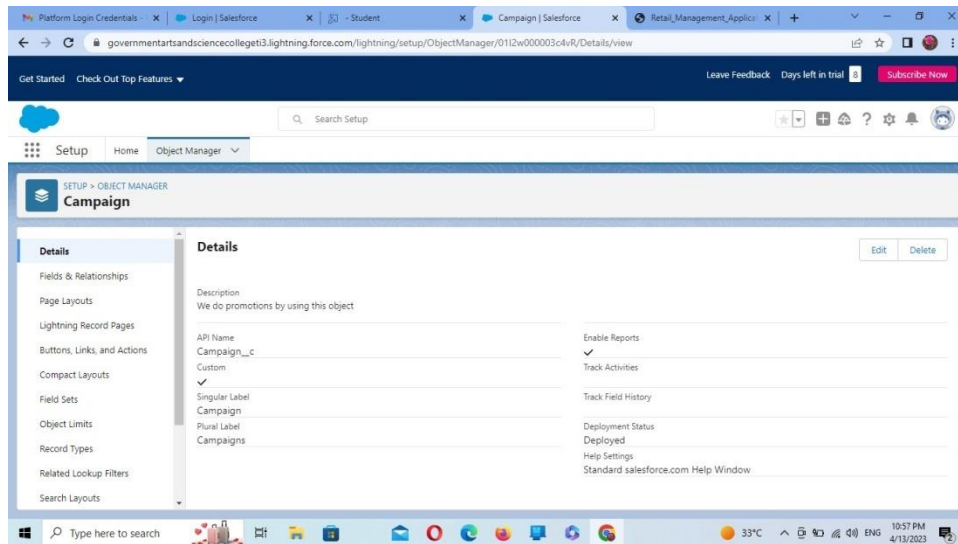


3.2.2. Creating Objects

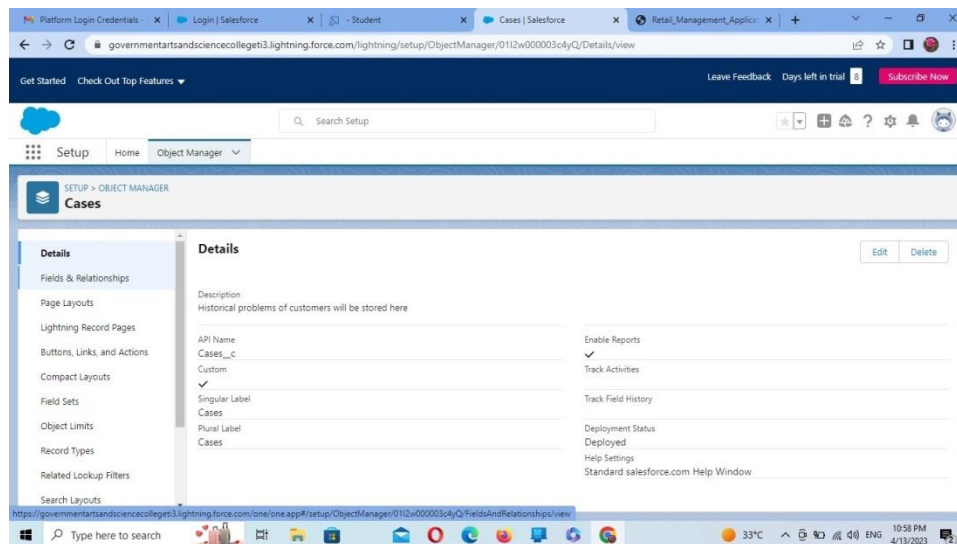
➤ Accounts



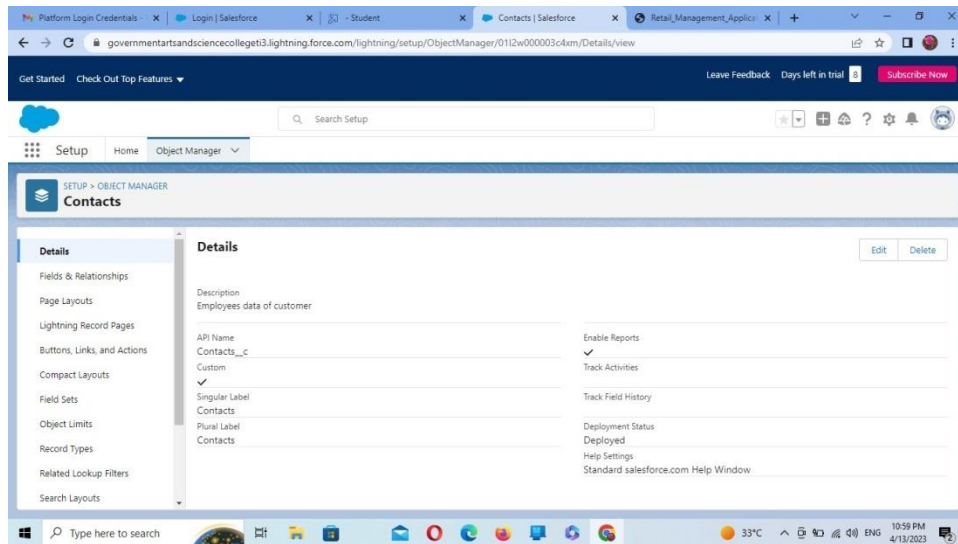
➤ Campaign



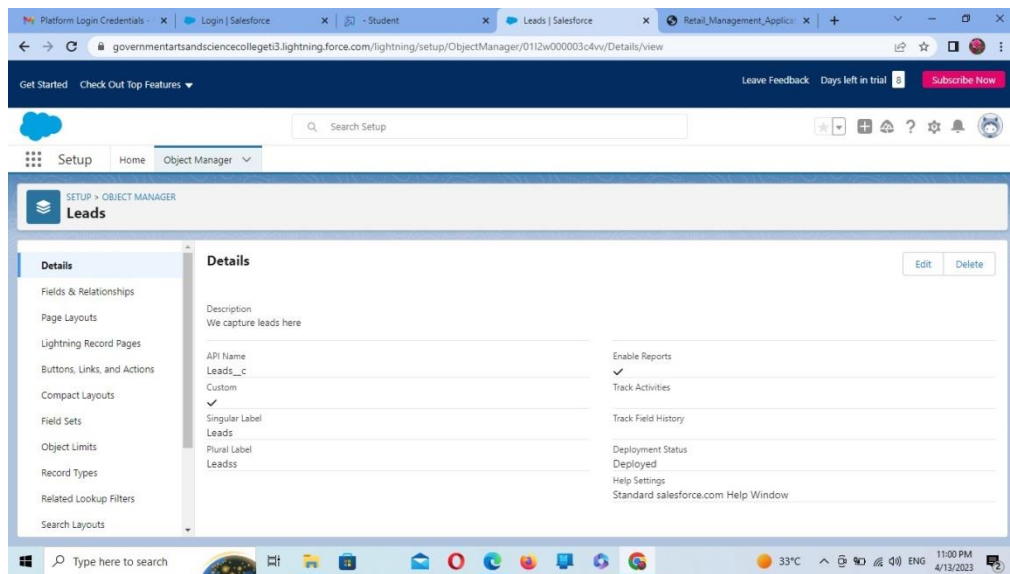
➤ Cases



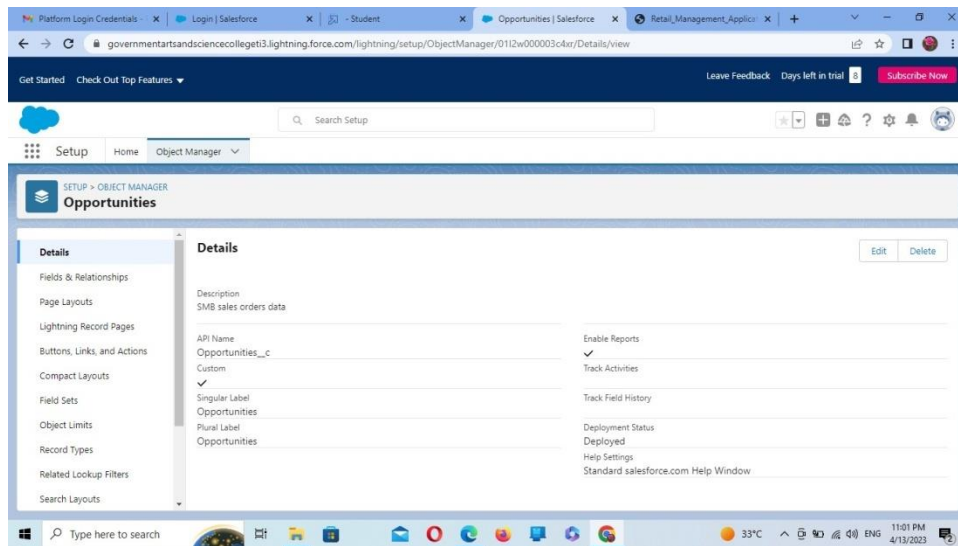
➤ Contacts



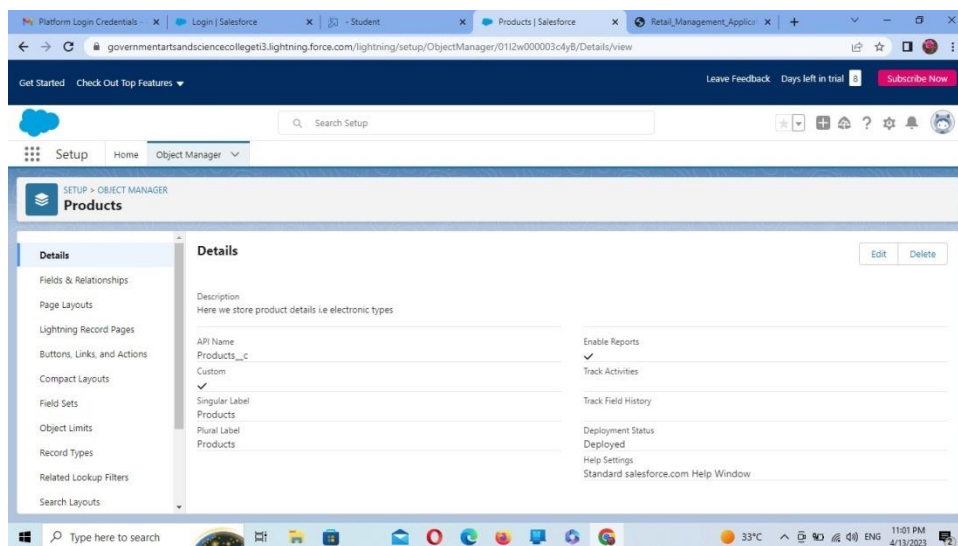
➤ Leads



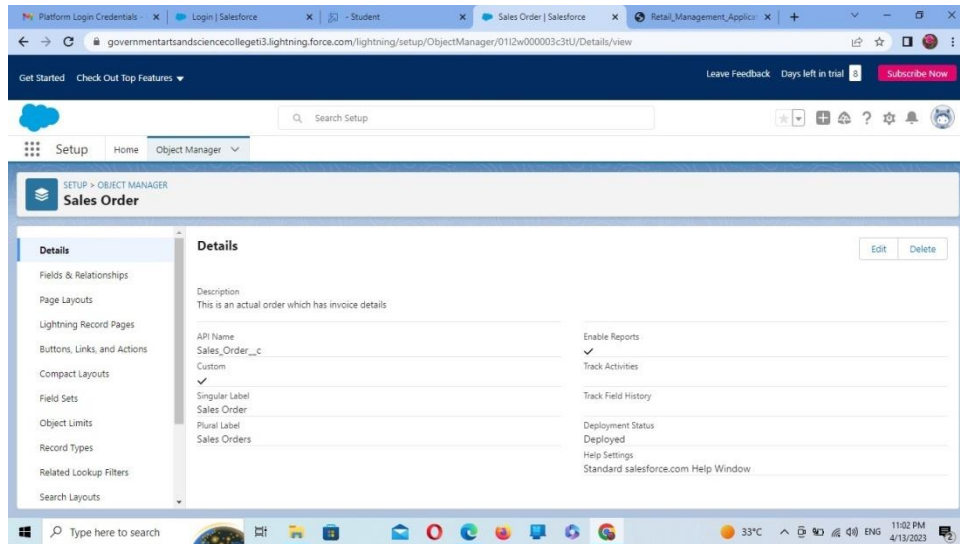
➤ Opportunity



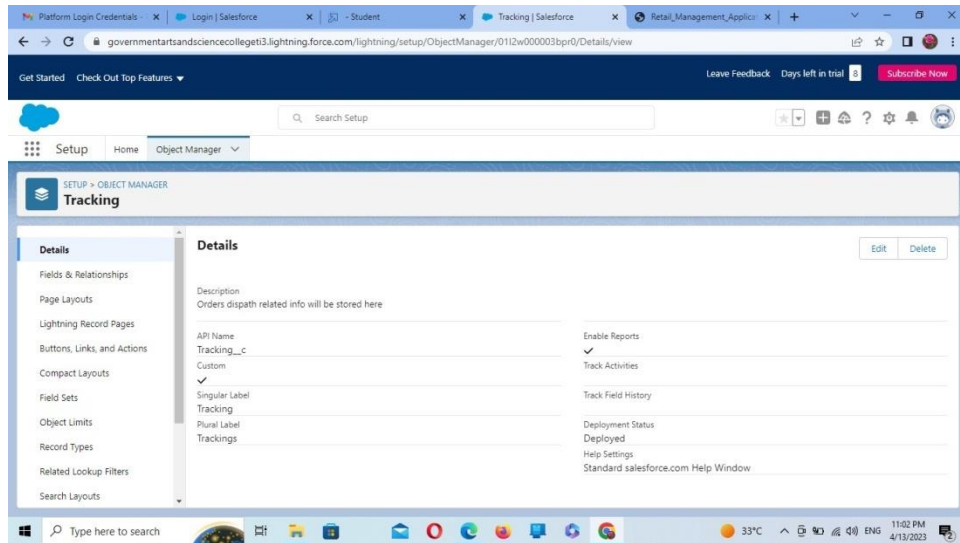
➤ Products



➤ Sales Order

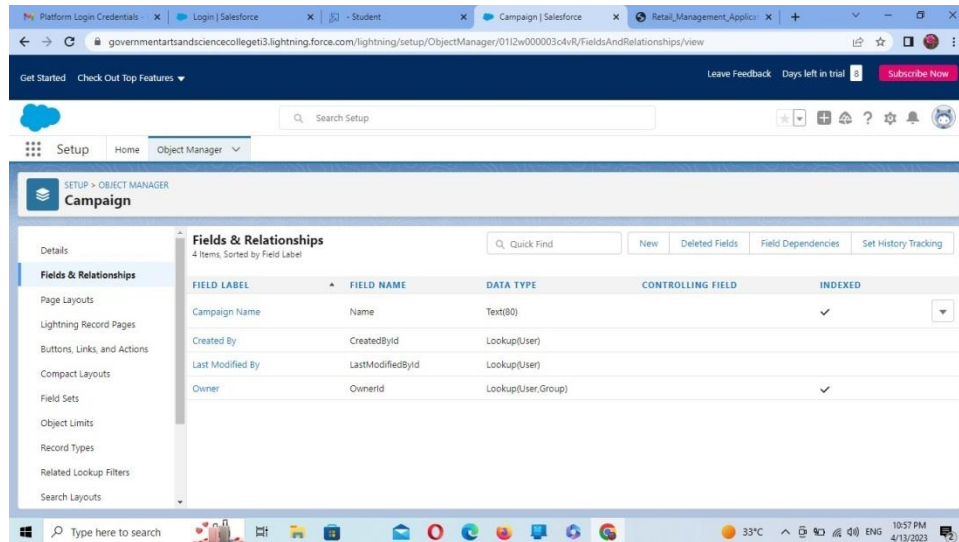


➤ Tracking



3.2.3. Relationship between Object

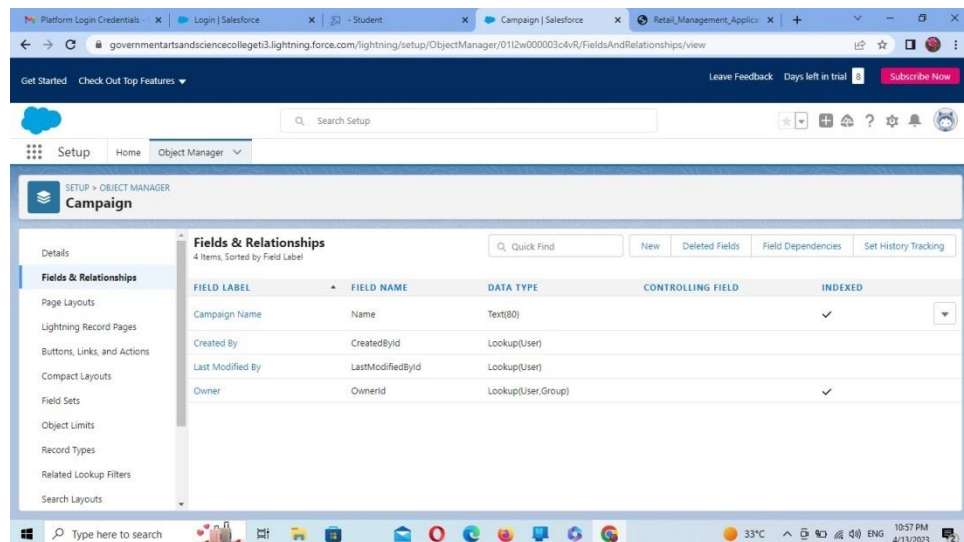
- Campaign(object)
- Campaign Name



The screenshot shows the Salesforce Setup interface for the Campaign object. The left sidebar lists various setup options, with 'Fields & Relationships' selected. The main content area displays a table of fields for the Campaign object, sorted by Field Label. The table includes columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are Campaign Name, Created By, Last Modified By, and Owner.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Campaign Name	Name	Text(80)		✓
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User.Group)		✓

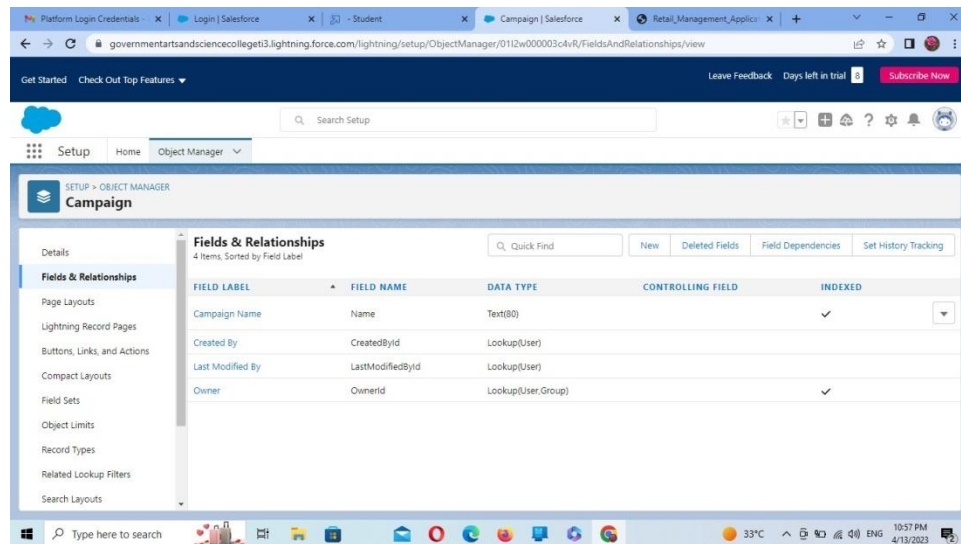
- Contact(object)
- Account Website



This screenshot is identical to the one above, showing the Salesforce Setup interface for the Campaign object. The left sidebar lists various setup options, with 'Fields & Relationships' selected. The main content area displays a table of fields for the Campaign object, sorted by Field Label. The table includes columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are Campaign Name, Created By, Last Modified By, and Owner.

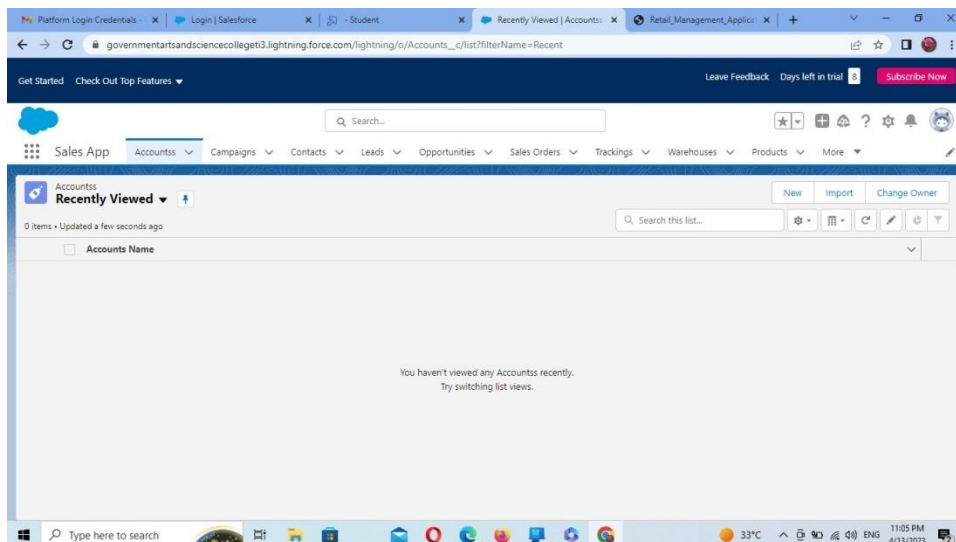
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Campaign Name	Name	Text(80)		✓
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User.Group)		✓

- Tracking/Dispatch(object)
- Dispatch
- Date of Delivery
- Sales order
- Tracking ID

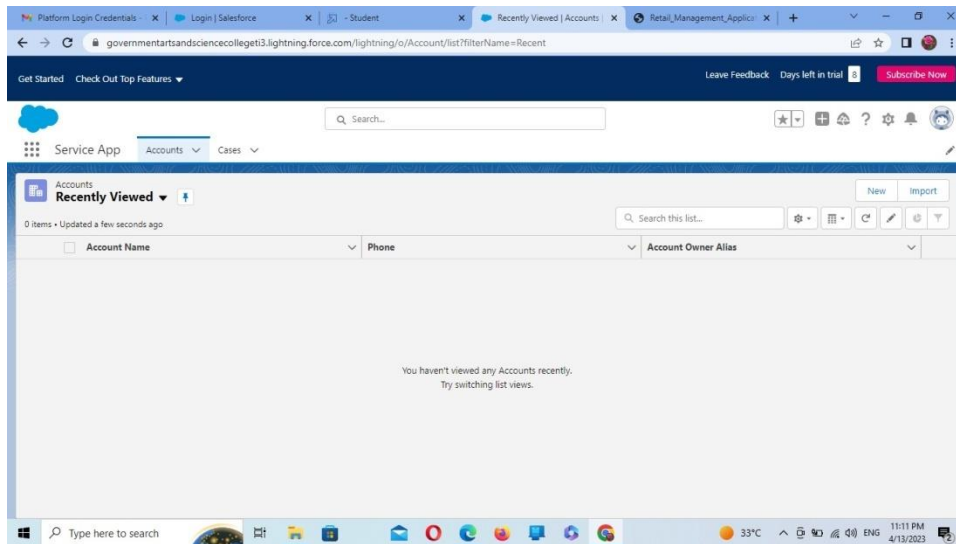


3.2.4. Creation of Application

- Sales App

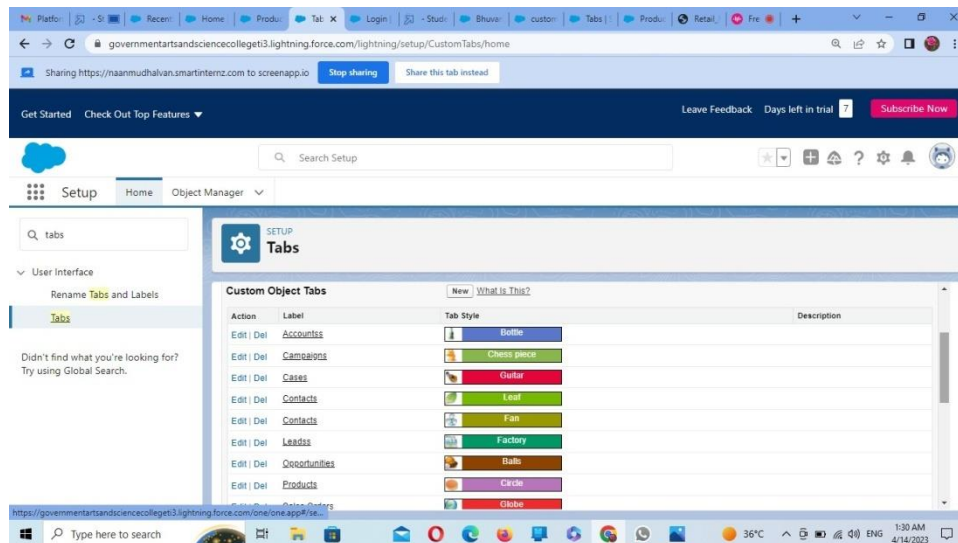


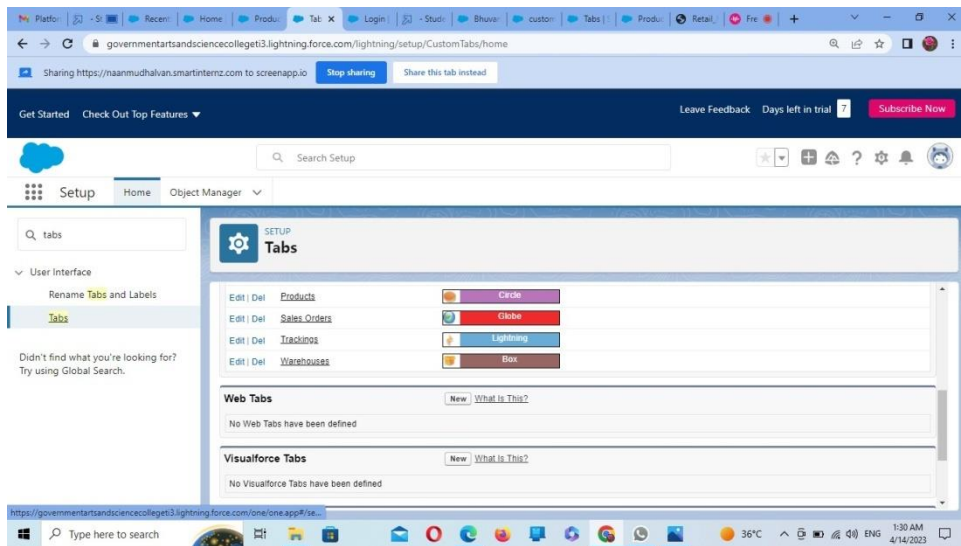
➤ Service App



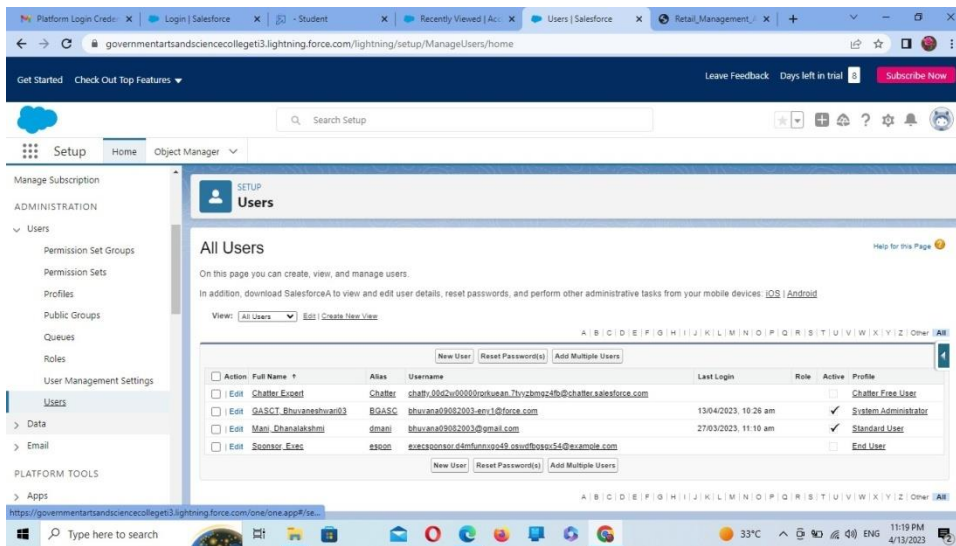
3.2.5.Layouts

Custom Tabs



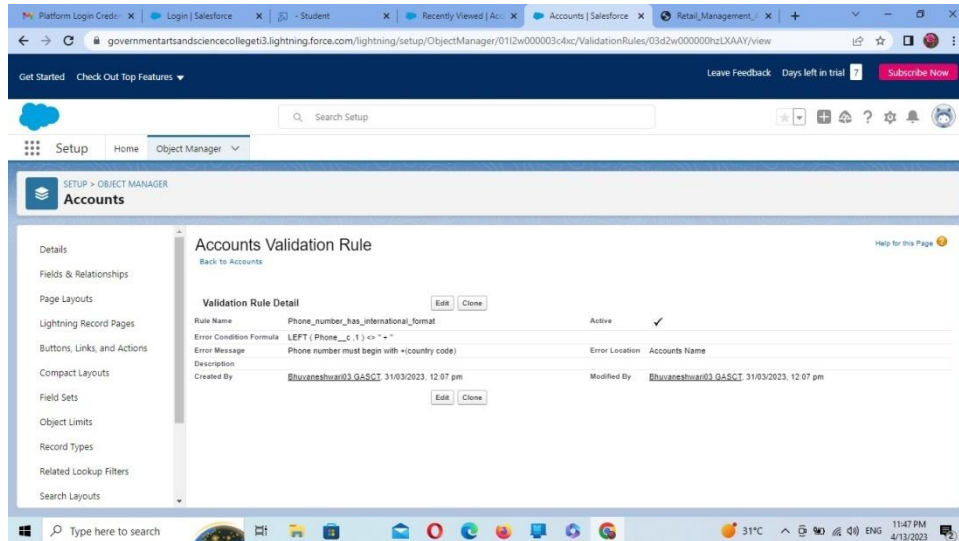


3.2.6. Creation of User

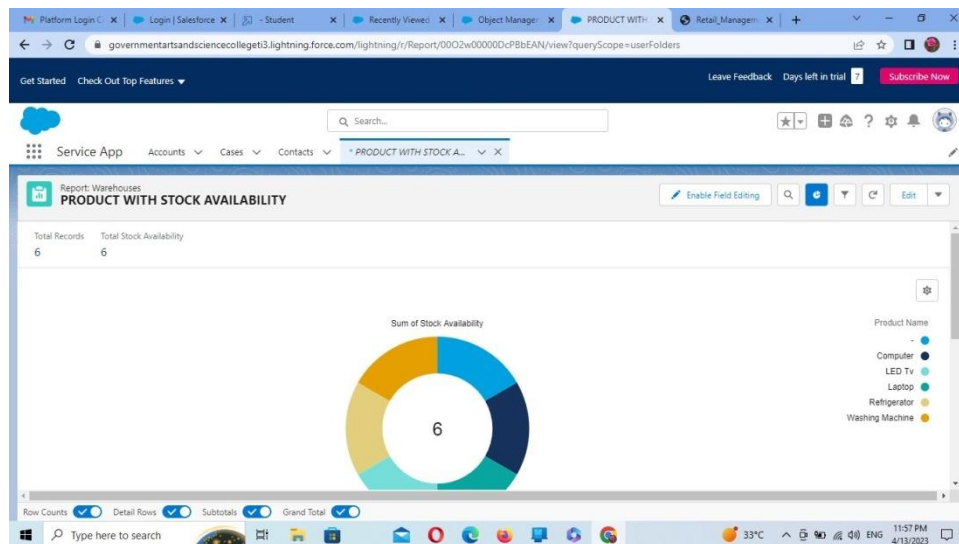


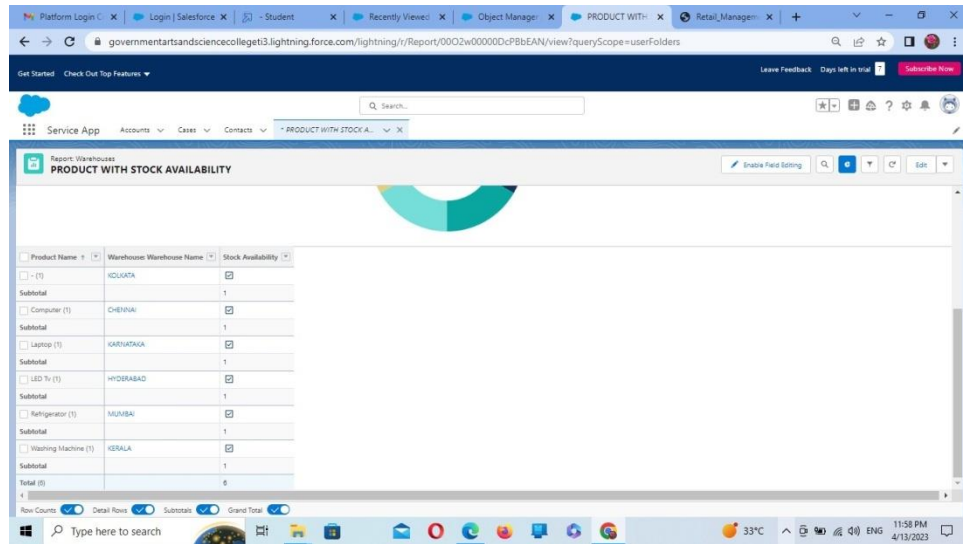
3.2.7.Validation Rules

Accounts

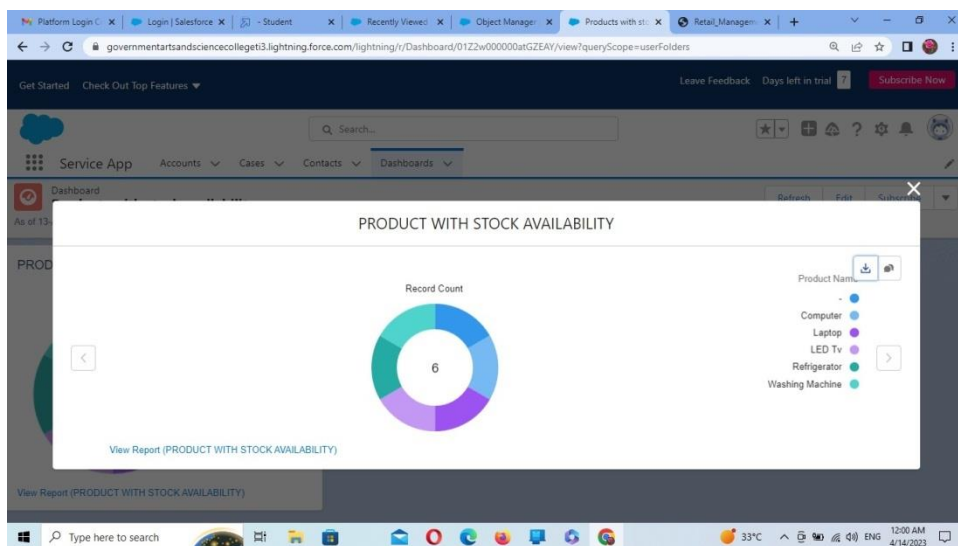


3.2.8. Reports





3.2.9. Dashboard



4. TRAILHEAD PROFILE PUBLIC URL

Team lead – <https://trailblazer.me/id/pwari6>

Team Member – <https://trailblazer.me/id/dheena2111>

Team Member – <https://trailblazer.me/id/rabsc>

Team Member – <https://trailblazer.me/id/mu11n>

5. ADVANTAGES AND DISADVANTAGES

Advantages

- Customer Satisfaction/Empathy.
- Hassle free shopping.
- Prevents unnecessary chaos and shop lifting activities.
- Proper accounting, greater deliver options.
- Well-Organized store and inventory management.

Disadvantages

- High marketing costs.
- Selling skills required.
- Very high competition.
- No economics of buying.
- It requires proper location.

6.APPLICATIONS

Retail management software is technology that helps business owners drive more sales with applications that include point of sale features, inventory management, retail customer relationship management and more. These solutions often include hardware for payment terminals and can support mobile devices.

7.CONCLUSION

Retailing encompasses the business activities involved in selling goods and services to consumers for their personal, family or household etc,...This CRM project created two applications one is sales app for sales reps to use their application and store customers data and the second application is a service app for service reps agents to provide support to customer in dealing cases.This system helps to generate business on top of the customers.

8.FUTURE SCOPE

In near future, the system interface could be improved, with more attractive, interactive and meaningful images; enhance the system with an email and SMS or email notifications when the new product has been arrived for sale.