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Salesforce for Retail

management Application

Introduction:

Retail management is a crucial aspect of any business that involves the selling of goods and services to customers. A retail management application can help businesses streamline their operations, manage inventory, and increase sales. Salesforce, a cloud-based customer relationship management (CRM) platform, can be used to build a retail management application that is efficient and user-friendly.

Body:

Salesforce provides several features that are helpful for building a retail management application. These features include a customizable interface, automation tools, and integrations with other software. With Salesforce, businesses can create a dashboard that displays key metrics such as sales, inventory levels, and customer information. They can also automate tasks such as ordering inventory and sending marketing emails.

Additionally, Salesforce can integrate with other software such as point of sale (POS) systems and accounting software. This integration allows for a seamless flow of data between systems, eliminating the need for manual data entry and reducing errors.

Salesforce also offers mobile access, which is essential for businesses that have employees working in the field or on the go. Employees can use their mobile devices to access customer information, check inventory levels, and place orders.

Conclusion:

In conclusion, building a retail management application using Salesforce can provide businesses with a comprehensive solution for managing their operations. The customizable interface, automation tools, and integrations with other software make Salesforce an ideal platform for building a retail management application. By utilizing Salesforce, businesses can increase their efficiency, reduce errors, and improve their customer service.

Empathy Map:



Empathy map

Use this framework to develop a deep, shared understanding of empathy for other people. An empathy map helps describe aspects of a user's experience and pain points, to quickly understand your users' experience and mindset.



Build empathy

The information you add here should be representative of the observations and research you've done about your users.

Says

What have we heard them say?
What can we imagine them saying?

The goal of this project is to develop a retail management application using sales force that will help the retailers to manage their operations effectively.

The target audience for this application are retailers who are looking for an efficient way to manage their inventory, sales, customer data and reporting.

Retailers think about how to differentiate their products and services, increase efficiency, and improve customer satisfaction.

The retail management application will enable store owners and managers to efficiently manage their operations and improve their sales performance.



Give them a name and a portrait to empathize with your persona.



The project requires identifying the challenges faced by the retailers, customers, employees, and shareholders in the retail industries and developing the solutions.

Shareholders focus that they would face issues and they could not find a sustainable business model.

The project requires creative thinking to develop innovative solutions that differentiate the retail management application from other similar applications in the market.

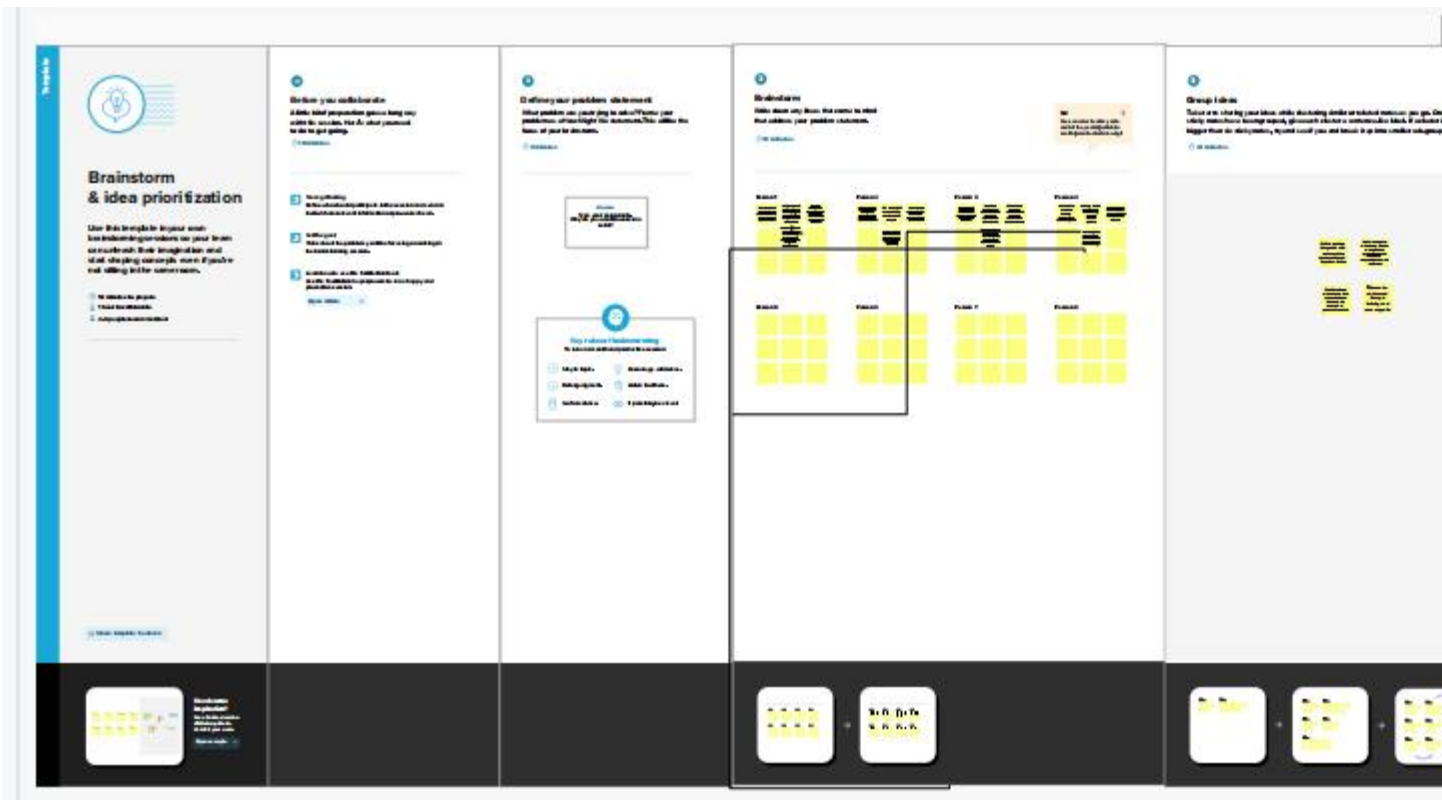
Does

What behavior have we observed?
What can we imagine them doing?

Share template feedback



Ideation and Brainstorming Map:



RESULT

Data model:

Application	Object	Description
	Campaign	We do promotions by using this object
	Leads	We capture leads here
	Accounts	We capture customers data
	Contacts	Employees data of customer
Sales app	Opportunities	SMB sales orders data
	products	Here we store product details I.e electronic types
	Warehouse	We capture stocks data
	Sales order	This is an actual order which has

		invoice details
	Dispatch/Tracking	Orders dispatch related info will be stored here

Application	Object	Description
Service app	Cases	Historical problems of customers will be stored here
	Accounts	We captures customers data

Creation of object Dispatch/Tracking



Search Setup



Setup

Home

Object Manager

Quick Find

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

> Users

> Data

> Email

PLATFORM TOOLS

> Subscription Management

> Apps

> Feature Settings



SETUP

Home



Get Started with Einstein Bots

Launch an AI-powered bot to automate your digital connections.

Get Started



Mobile Publisher

Use the Mobile Publisher to create and manage mobile content.

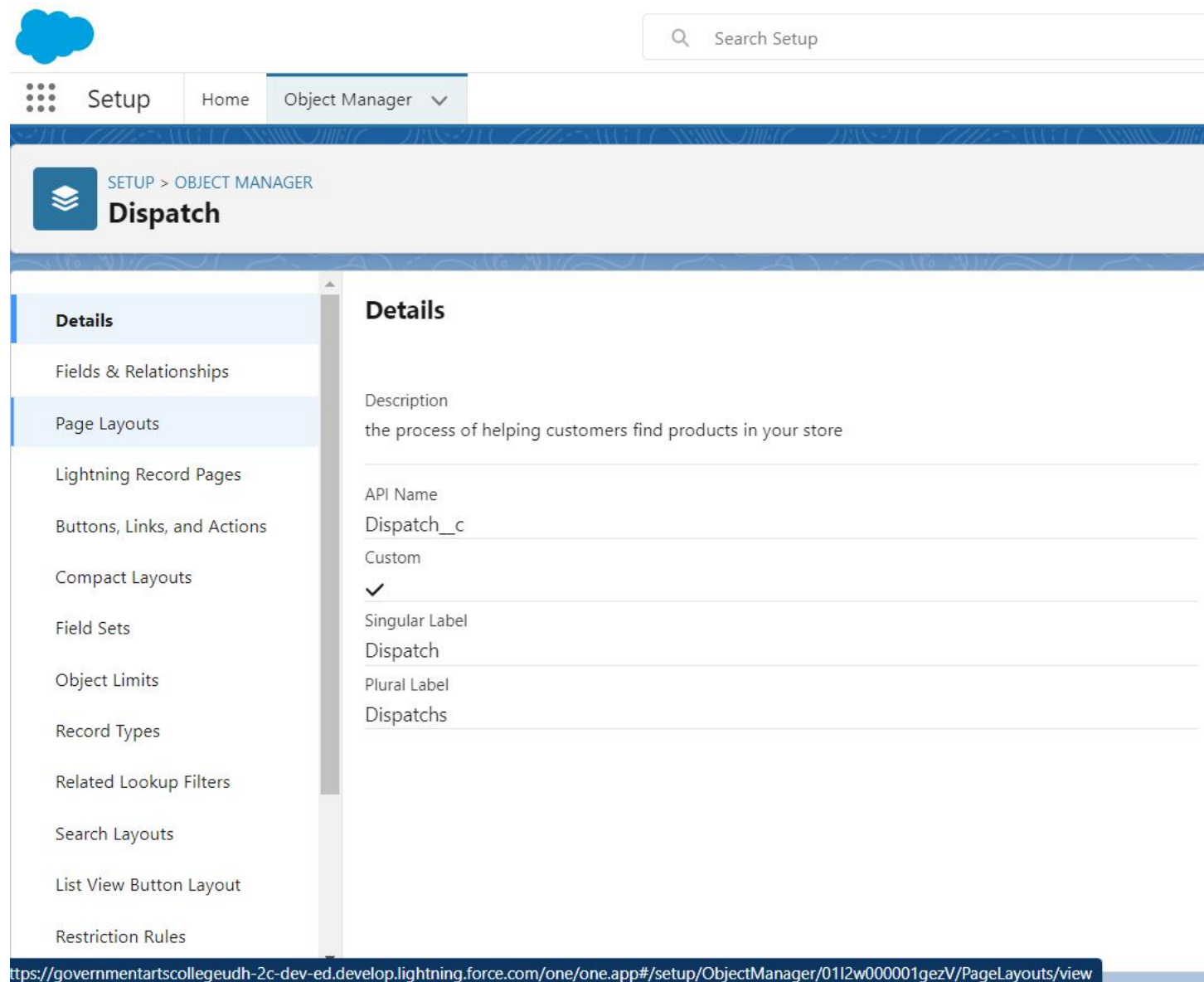
Most Recently Used

10 items

NAME

account

Creation of fields on Dispatch/tracking

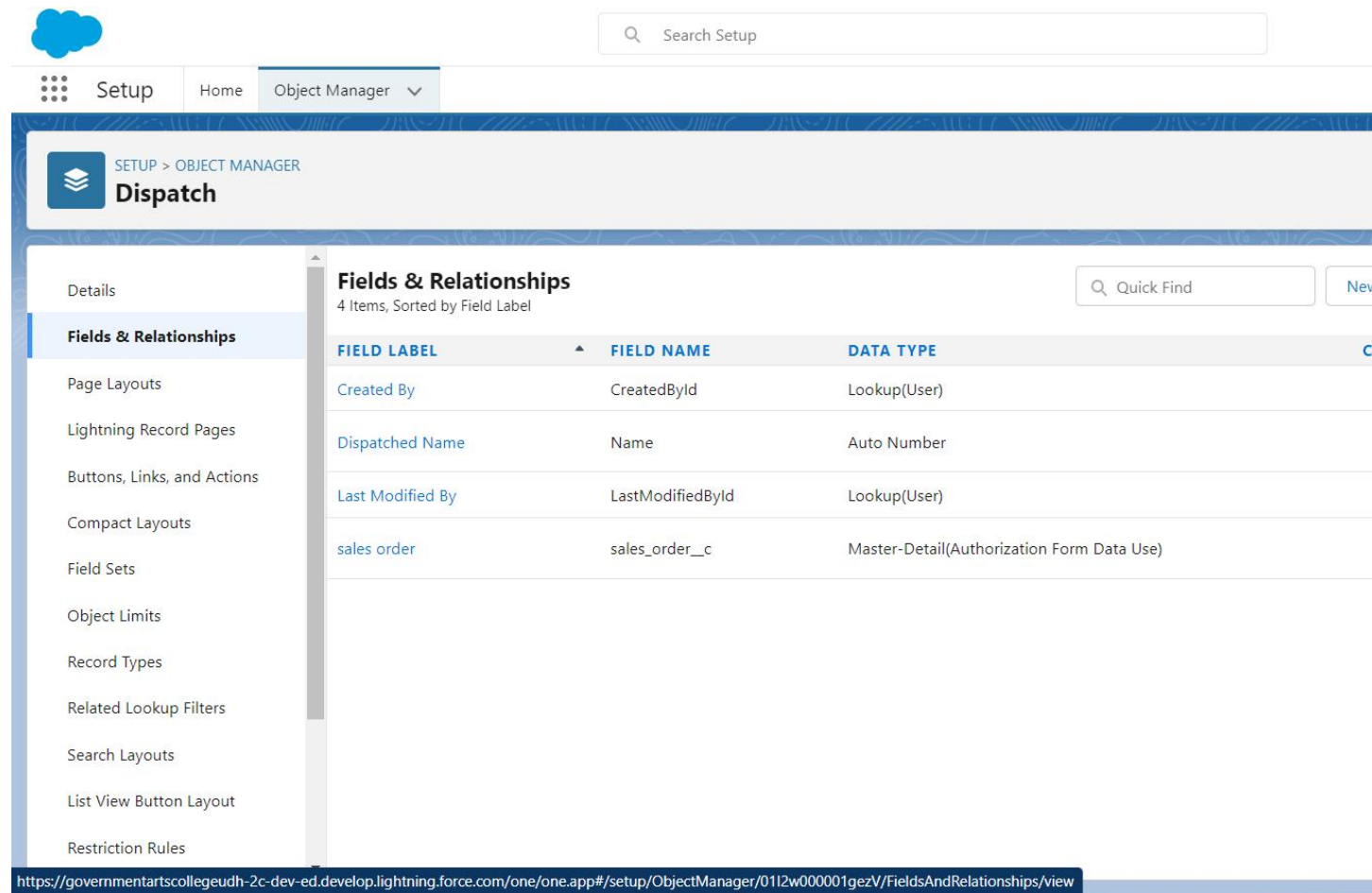


The screenshot shows the Salesforce Setup interface. At the top, there is a blue cloud icon and a search bar labeled "Search Setup". Below this is a navigation bar with "Setup", "Home", and "Object Manager" (with a dropdown arrow). The main header area displays "SETUP > OBJECT MANAGER" and "Dispatch" with a stack icon. A left sidebar lists various configuration options: Details, Fields & Relationships, Page Layouts (highlighted), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules. The main content area, titled "Details", shows the following information:

- Description: the process of helping customers find products in your store
- API Name: Dispatch__c
- Custom: ☒
- Singular Label: Dispatch
- Plural Label: Dispatches

The URL at the bottom of the page is: <https://governmentartscollegeudh-2c-dev-ed.develop.lightning.force.com/one/one.app#/setup/ObjectManager/0112w000001gezV/PageLayouts/view>

Creation of relationships between objects




The screenshot displays the Salesforce Setup interface. At the top, there is a search bar labeled 'Search Setup'. Below it, the navigation menu includes 'Setup', 'Home', and 'Object Manager'. The 'Object Manager' tab is selected, showing a breadcrumb trail 'SETUP > OBJECT MANAGER' and the object name 'Dispatch'. On the left, a sidebar lists various configuration options: Details, Fields & Relationships (selected), 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, and Restriction Rules. The main content area is titled 'Fields & Relationships' and indicates '4 Items, Sorted by Field Label'. It contains a table with the following data:

FIELD LABEL	FIELD NAME	DATA TYPE
Created By	CreatedById	Lookup(User)
Dispatched Name	Name	Auto Number
Last Modified By	LastModifiedById	Lookup(User)
sales order	sales_order__c	Master-Detail(Authorization Form Data Use)

At the bottom of the page, the URL is visible: <https://governmentartscollegeudh-2c-dev-ed.develop.lightning.force.com/one/one.app#/setup/ObjectManager/0112w000001gezV/FieldsAndRelationships/view>

Creation of Application



Search Setup

SetupHomeObject Manager


Q tabs

▼ User Interface

Rename Tabs and Labels

Tabs

Didn't find what you're looking for?
Try using Global Search.

SETUP
Tabs



Custom Tabs

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 extend Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in the Salesforce Experience and the mobile app.

Custom Object Tabs

NewWhat Is This?

Action	Label	Tab Style
Edit Del	Customers	 Compass
Edit Del	retail managements	 Computer

Web Tabs

NewWhat Is This?

No Web Tabs have been defined

Visualforce Tabs

NewWhat Is This?


No Visualforce Tabs have been defined

Lightning Component Tabs

NewWhat Is This?

https://governmentartscollegeudh-2c-dev-ed.develop.lightning.force.com/one/one.app#/set...

Creation of user



Search Setup

SetupHomeObject Manager

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings


Users

Feature Settings

Data.com

Prospector Users

Didn't find what you're looking for?
Try using Global Search.

SETUP
Users

All Users

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.


View: All Users [Edit](#) | [Create New View](#)

New UserReset Password(s)Add Multiple Users

<input type="checkbox"/>	Action	Full Name ↑	Alias	Username
<input type="checkbox"/>	Edit	B. Dhanush	DB	dhanush@gacooty.com
<input type="checkbox"/>	Edit	B. Dhanush	db	dhanushbabu486@gmail.com
<input type="checkbox"/>	Edit	Chatter Expert	Chatter	chatty.00d2w00000rjtdtead.oc6pzyezetap@chatter.salesforce.com
<input type="checkbox"/>	Edit	User, Integration	integ	integration@00d2w00000rjtdtead.com
<input type="checkbox"/>	Edit	User, Security	sec	insightssecurity@00d2w00000rjtdtead.com

New UserReset Password(s)Add Multiple Users

Creation of validation rule




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

Hierarchy Columns

Details

Description

API Name

Account

Custom

Singular Label


Account

Plural Label

Accounts

<https://governmentartscollegeudh-2c-dev-ed.develop.lightning.force.com/one/one.app#/setup/ObjectManager/Account/view>

Creation of cross object




Search Setup

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Contact

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

Hierarchy Columns

Fields & Relationships

33+ Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE
Account Name	AccountId	Lookup
Account Website	Account_Website__c	Formula
Assistant	AssistantName	Text(40)
Asst. Phone	AssistantPhone	Phone
Birthdate	Birthdate	Date
Clean Status	CleanStatus	Picklist
Contact Owner	OwnerId	Lookup
Created By	CreatedBy	Lookup
Data.com Key	Jigsaw	Text(20)
Department	Department	Text(80)
Description	Description	Long Text

https://governmentartscollegeudh-2c-dev-ed.develop.lightning.force.com/one/one.app#/setup/ObjectManager/Contact/FieldsAndRelationships/view

Creation of Report



Search...



Sales

Home

Opportunities

Leads

Tasks

Files

Accounts

Contacts

Campaigns

Reports

Recent

1 item

REPORTS

Report Name



Description



Folder



Created

Recent

Reports

product with stock availability

Dhanush

Created by Me

Private Reports

Public Reports

All Reports

FOLDERS

All Folders

Created by Me


Shared with Me

FAVORITES

All Favorites

To Do List

Creation of Dashboards



Sales
Home
Opportunities
Leads
Tasks
Files
Accounts
Contacts
Campaigns

Dashboards

Recent

1 item

DASHBOARDS	Dashboard Name	Description	Folder	Create
Recent	products with stock availability		Private Dashboards	Dhanu
Created by Me				
Private Dashboards				
All Dashboards				
FOLDERS				
All Folders				
Created by Me				
Shared with Me				
FAVORITES				
All Favorites				

To Do List

Trailhead profile public URL

Team Lead -<https://trailblazer.me/id/dababu99>

Team Member 1 -<https://trailblazer.me/id/ddhanush19>

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

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

Advantages and disadvantage of retail management application using Salesforce

Advantages:

Streamlined processes: Salesforce can help retail businesses streamline their processes and workflows, from inventory management to customer service.

Improved customer engagement: Salesforce's CRM capabilities can help retailers improve customer engagement by allowing them to better understand customer needs and preferences and provide personalized experiences.

Real-time data: Retail management applications using Salesforce can provide real-time data on sales, inventory, and customer behavior, enabling retailers to make data-driven decisions and respond quickly to changing market conditions.

Integration with other systems: Salesforce can integrate with other systems and applications, such as point-of-sale systems, marketing automation tools, and accounting software, providing a comprehensive solution for retail businesses.

Scalability: Salesforce's cloud-based architecture enables retailers to scale up or down as needed, making it a flexible solution for businesses of all sizes.

However, there are also some potential disadvantages of using retail management applications using Salesforce, including:

Disadvantages:

Cost: Salesforce can be an expensive solution, particularly for small businesses with limited budgets.

Complexity: The complexity of Salesforce can be overwhelming for some users, particularly those who are not familiar with the platform.

Customization: Customizing Salesforce to meet the specific needs of a retail business can be time-consuming and require specialized expertise.

Integration challenges: Integrating Salesforce with other systems and applications can be complex and require additional development work.

Training: Salesforce requires specialized training and expertise to use effectively, which may require additional time and resources.

Application

Inventory Management: The retail management application can help retailers keep track of their inventory levels in real-time. This will ensure that they don't run out of stock, and they can easily manage their inventory by monitoring sales and restocking when necessary.

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- **Marketing and Promotion Management:** Retailers can use the Salesforce Marketing Cloud to design and launch marketing campaigns targeted at specific customer segments. They can also analyze the effectiveness of their campaigns and adjust them as needed.
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- **Point of Sale:** The application can integrate with a retailer's point of sale system to streamline the checkout process. This will help retailers process transactions faster, reduce errors, and improve customer satisfaction.
-
- **Analytics and Reporting:** The application can provide retailers with real-time analytics and reporting capabilities. This will allow them to monitor key performance indicators such as sales, inventory levels, and customer satisfaction. They can also use this data to identify trends and make informed business decisions.
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Overall, a retail management application using Salesforce can help retailers streamline their operations, improve customer engagement and loyalty, and make data-driven business decisions

Conclusion

In conclusion, a retail management application using Salesforce can provide significant benefits to retailers, including improved customer engagement, increased efficiency, and better data management. Salesforce provides a comprehensive platform that can support various retail management functions, such as customer relationship management, inventory management, and sales management.

Future scope

The future scope of a retail management application using Salesforce is promising, as retailers continue to prioritize customer experience and data-driven decision-making. Retailers can use Salesforce's advanced analytics and artificial intelligence capabilities to gain insights into customer behavior, optimize inventory levels, and improve sales performance. Additionally, with the growth of e-commerce and omnichannel retailing, a retail management application using Salesforce can help retailers integrate their online and offline operations, providing a seamless shopping experience for customers.

Overall, a retail management application using Salesforce has significant potential to enhance retailers' operations and improve their bottom line. As retailers continue to adapt to changing market trends and customer expectations, the use of Salesforce can help them stay competitive and drive growth.