

RETAIL MANAGEMENT APPLICATION USING SALESFORCE

1.INTRODUCTION

OVERVIEW:

Salesforce for Retail is a set of solutions built on the Salesforce platform designed to help retail companies manage their operations and customer relationships. These solutions include tools for managing inventory, sales, customer data, marketing, and more. Retail Management is the study of promoting and selling products and services while increasing customer satisfaction and brand loyalty.

PURPOSE:

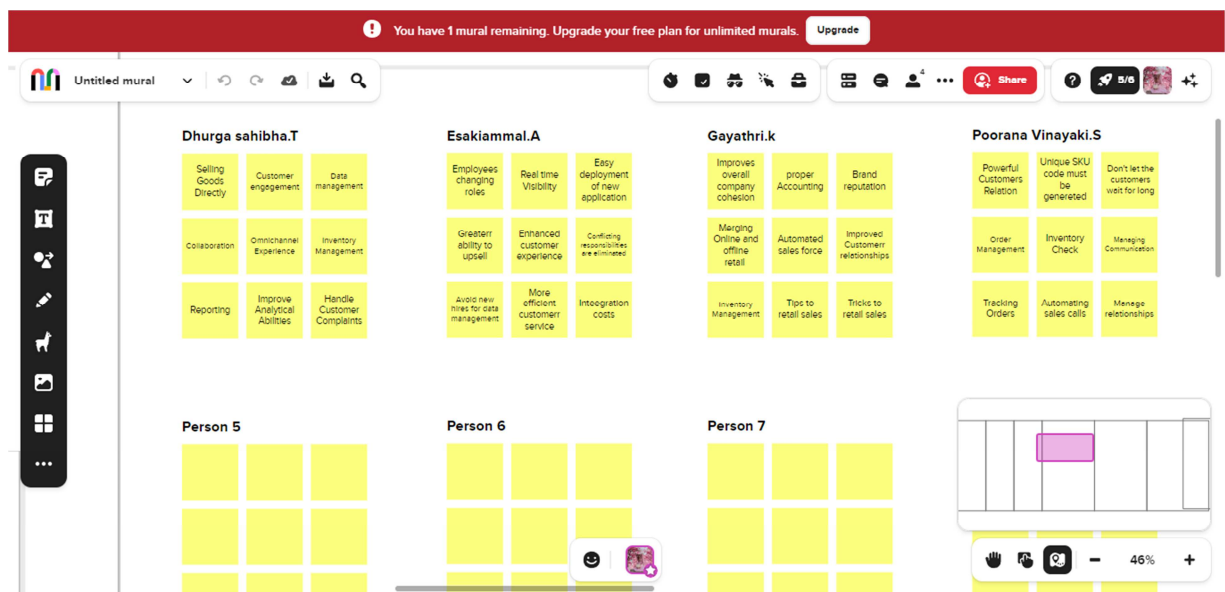
Retail management optimizes internal processes such as inventory management, offline and online storefronts, warehouse operations, payment and accounting, and human resources. Retail management improves overall company cohesion. Retail store management improves customer experience and boosts customer satisfaction. Retail management is a very good stream to choose as a career as the retail industry is growing with pace. Since the retail store chains such as Walmart, Big Bazaar, D Mart, etc. are expanding their networks, hence it is obvious that they will create many job opportunities in this sector.

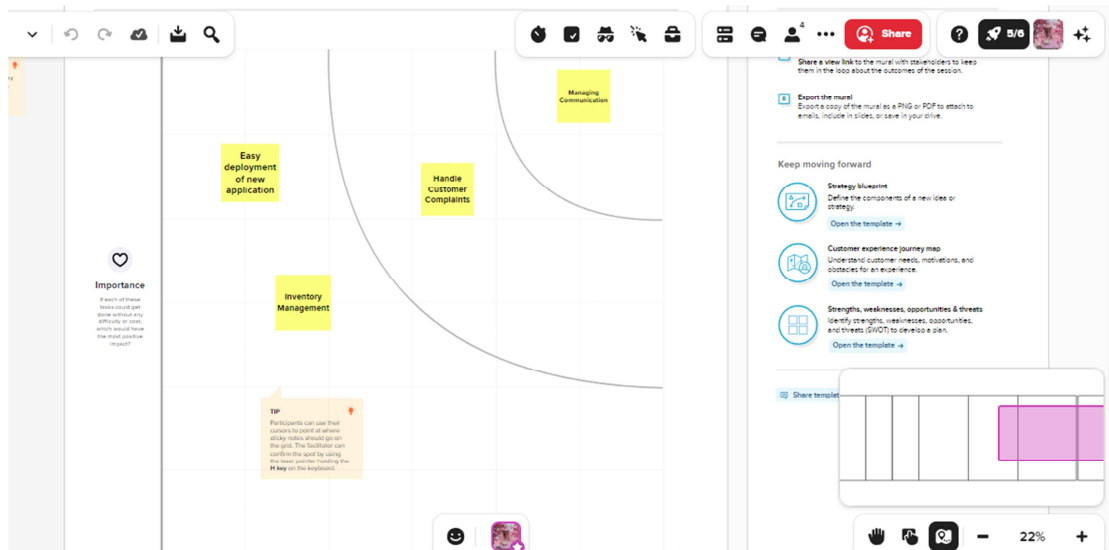
2. PROBLEM DEFINITION & DESIGN THINKING

EMPATHY MAP:



IDEATION & BRAINSTORMING MAP:





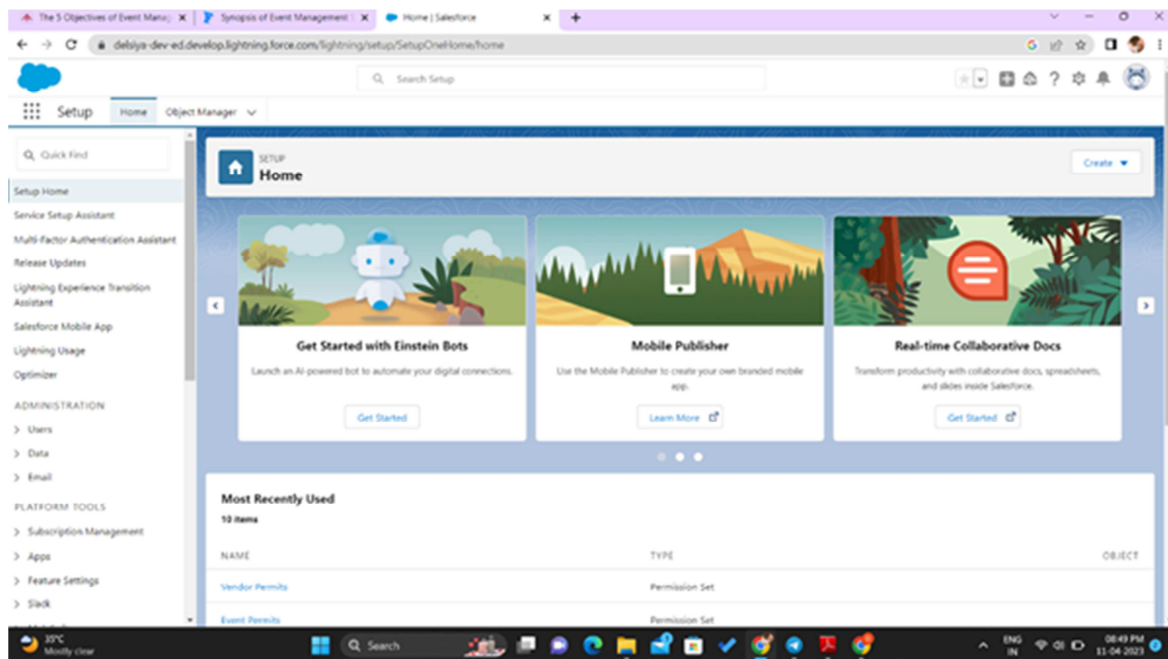
3. RESULT

3.1 DATA MODEL

Object name	Fields in the object	
Dispatched	Field lable	Data type
	Dispatch/trackings	Text
	Dispatched	checkbox
Salesorder	Field lable	Data type
	Salesorder	Master detail relationship

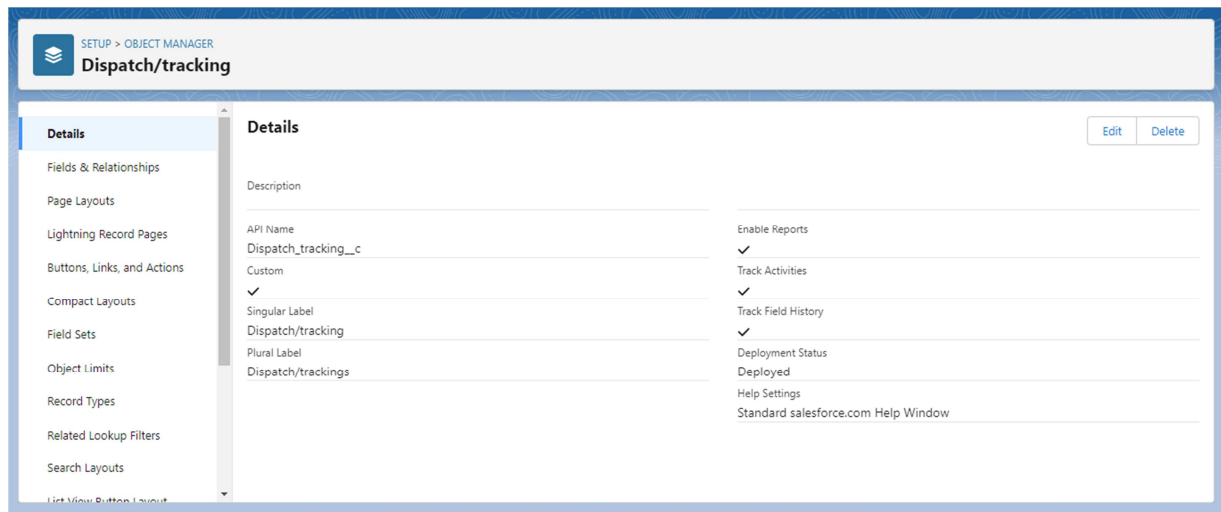
3.2 ACTIVITY & SCREENSHOTS

1. Created a Salesforce Developer Org through the website developer.salesforce.com and the setup page appeared.

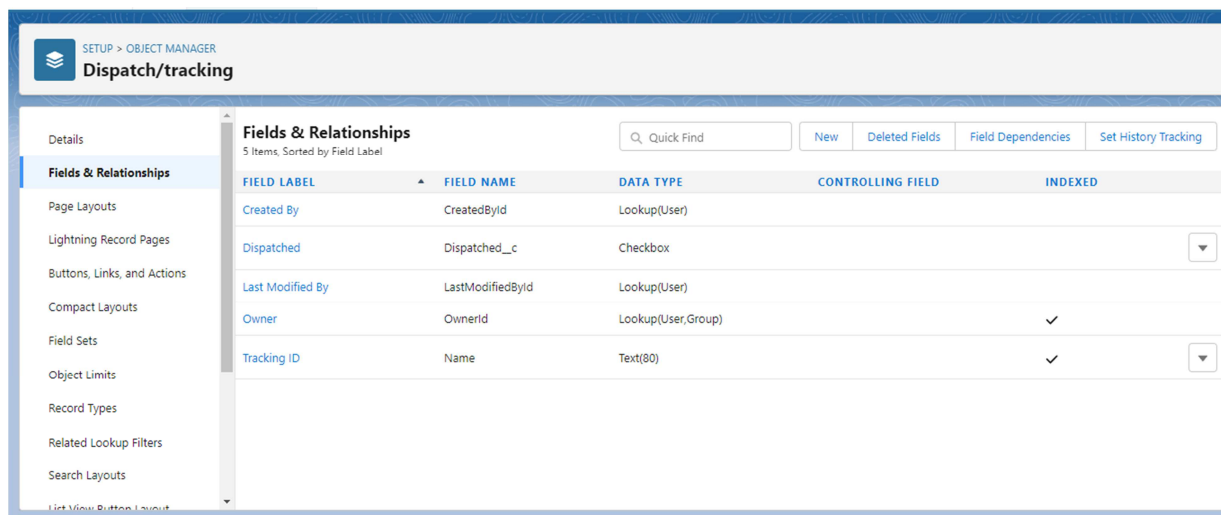


2. Custom Object i.e, Dispatch/trackings and sales order created.

Activity 1: Object Dispatch/tracking is created



Activity 2: Object Sales order created.



3. Relationship between objects created i.e, Created a relationship between Master Detail relationship & Dispatch/trackings, Sales order.

SETUP > OBJECT MANAGER

Dispatch/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

Fields & Relationships

5 Items, Sorted by Field Label

Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Dispatched	Dispatched__c	Checkbox		
Last Modified By	LastModifiedById	Lookup(User)		
sales order	sales_order__c	Master-Detail(Seller)		✓
Tracking ID	Name	Text(80)		✓

4. Lightning app was created.

app manager

Apps
App Manager

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

Lightning Experience App Manager

Clone Apps(Beta)

Quickly create new Lightning apps by cloning existing apps. To use the beta feature, indicate that you've read all legal requirements and agree to participate by toggling Enable App Cloning. See additional details and terms in the [Winter '23 release notes](#)

Enable App Cloning ☐ Disabled

22 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

	App Name	Developer Name	Description	Last Modified ...	Ap...	Vi...
1	All Tabs	AllTabSet		11/04/2023, 9:45 pm	Classic	
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	11/04/2023, 9:45 pm	Classic	✓
3	App Launcher	AppLauncher	App Launcher tabs	11/04/2023, 9:45 pm	Classic	✓
4	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your in...	11/04/2023, 9:47 pm	Lightning	✓
5	Community	Community	Salesforce CRM Communities	11/04/2023, 9:45 pm	Classic	✓
6	Content	Content	Salesforce CRM Content	11/04/2023, 9:45 pm	Classic	✓

5. Custom Object Tabs was created.

SETUP

Object Manager

Account Validation Rule

Back to Account Validation Rules

Help for this Page

Validation Rule Detail

Edit

Clone

Rule Name

Phone_number_has_international_format

Active

✓

Error Condition Formula

LEFT(Phone, 1)<>"+"

Error Location

Phone

Error Message

Phone number must begin with + (country code)

Description

Created By

Dhuroa.sahibha.T

11/04/2023, 10:33 pm

Modified By

Dhuroa.sahibha.T

11/04/2023, 10:33 pm

Edit

Clone

Activity 2: Cross Object was created using Contact Object.

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

Fields & Relationships

33 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Account Name	Accountid	Lookup(Account)		✓
Account Website	Account_Website__c	Formula (Text)		
Assistant	AssistantName	Text(40)		
Asst. Phone	AssistantPhone	Phone		
Birthdate	Birthdate	Date		
Clean Status	CleanStatus	Picklist		✓
Contact Owner	Ownerid	Lookup(User)		✓
Created By	CreatedById	Lookup(User)		
Data.com Key	Jigsaw	Text(20)		

8. Report was created using Warehouse.

Sales App Accounts Campaigns Contacts Leads Opportunities Products Warehouses Report Builder More

REPORT Products with stock availability Warehouses

Previewing a limited number of records. Run the report to see everything. Update Preview Automatically

Product Name	Warehouse: Warehouse Name	Stock Available
- (2)	Passbook1	
	Test Case-2	
Subtotal		1
Air conditioner (1)	Hyderabad	
Subtotal		1
Fan (1)	Kolkata	
Subtotal		1
Refrigrator (1)	Chennai	
Subtotal		1
Washing Machine (1)	Mumbai	
Subtotal		1
Total (6)		5

Row Counts Detail Rows Subtotals Grand Total Conditional Formatting

9. Dashboards was created using reports.

Edit Component

Max Values Displayed

6

Title

Products with stock availability

Subtitle

Footer

Legend Position

Right

Preview

Products with stock availability

Sum of Stock Available

5

View Report (Products with stock availability)

Product Name

-
- Air conditioner
- Fan
- Refrigrator
- Washing Machine

Cancel Update

4. TRAILHEAD PROFILE PUBLIC URL:

Team Lead-

<https://trailblazer.me/id/dsahibha>

Team Member 1-

<https://trailblazer.me/id/esaka23>

Team Member 2-

<https://trailblazer.me/id/gayak202>

Team Member 3-

<https://trailblazer.me/id/pvinayakia>

ADVANTAGES & DISADVANTAGES

Advantages:

1. Selling goods on credit.
2. Helps customers to make purchase decision.
3. Optimises all store processes.
4. Simple Account Planning.
5. To manage customer relationships, track inventory, and automate sales processes.

Disadvantages:

1. Inadequate capital.
2. Lower Profit Margin.
3. No room for expansion due to lack of enough capital.
4. Inability to enjoy economies of scale.
5. Do not easily obtain loan.

APPLICATIONS

IT helps to store customer data, which the retailer can then use to reach out **to** customers. Through email with personalized offers or with mail offers. And when at the check-out process, retailers can search up the customer's information to make their experience efficient and quick. Information technology is the enabler in the retail industry. It improves the customer experience and offers a personalized buying

experience to customers. It also speeds up the processes and increases sales. As well as improves the customer retention rate, and offers cost-saving benefits to the company.

CONCLUSION:

In this course we have explored the meaning of the terms retailing, marketing and marketing communications. We have also considered the importance of the marketing mix and identified the different communication tools that a retailer might use to interact and communicate with their target customers. You have been introduced to a few theoretical concepts and ideas, which have been illustrated using real world examples and cases in retailing.

FUTURE SCOPE:

The retail sector in the country is currently booming, providing plenty of career prospects for people with a passion for sales marketplaces, business diversification, campaigning, advertising, market research, and segmentation. With the continuous expansion of the retail industry, there is a growing demand for retail courses that will prepare students to cope with the tactics, procedures, and methods that will help them generate more sales and customer satisfaction. Retail management has become one of the fastest-growing occupations in the industry as the economy has grown significantly. The retail industry in India is the most appealing and fastest-growing in the world, demanding an increase in competent expertise in this discipline. It intends to create a new generation of international-caliber smart retail experts by providing them with global best practices.

