

# **RETAIL MANAGEMENT APPLICATION USING SALESFORCE**

## **1.INTRODUCTION**

### **OVERVIEW:**

Salesforce is the ultimate sales automation platform for retailers. Retailers can use Salesforce to manage customer relationships, track inventory, and automate sales processes. Salesforce is an extremely powerful platform that can help retailers streamline their sales processes and improve their overall performance.

### **PURPOSE:**

Salesforce provides a unified platform for managing customer interactions, which enables retailers to deliver personalized shopping experiences. Salesforce provides a centralized repository for managing customer, product, and sales data. Salesforce provides a seamless omnichannel experience for customers, allowing them to shop on any device and in any location.

## **2.PROBLEM DEFINITION AND DESIGN THINKING**

### **EMPHATHY MAP**



## IDEATION & BRAINSTROMING MAP:

2

## Brainstorm

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

🕒 10 minutes

### TIP

You can select a sticky note and hit the pencil (switch to sketch) icon to start drawing!

#### M.Durga Devi

Marketing	Supply chain	Store Management
Human Resource	Store Operations	Sales
Accounting and Finance	Store Design	Marketing

#### L.Sakkiammal Karthika

Identify needs of staff and train staff better	Flexibility for customers	easy access to services
provide early warning about availability	provide personalized ideas and creating online	understand the customer service principles
presentation of items and identifying strategy	flexible free shipping	proper accounting

#### N.Petchiammal

Customer Services	Stock Ledger	Invoices and Bill
Purchase Module	Stock Inventory	Online Management
Business Analysis	Stock Management	Inventory

#### K.Ramu

Types of Retail Management	Super market	Discount Retailers
Warehouse Retailers	Partnership	Gifts and Shipping services
Online Retailing	Catalog Retailing	Warehouse Retailing

#### M.Subaltha Perzane

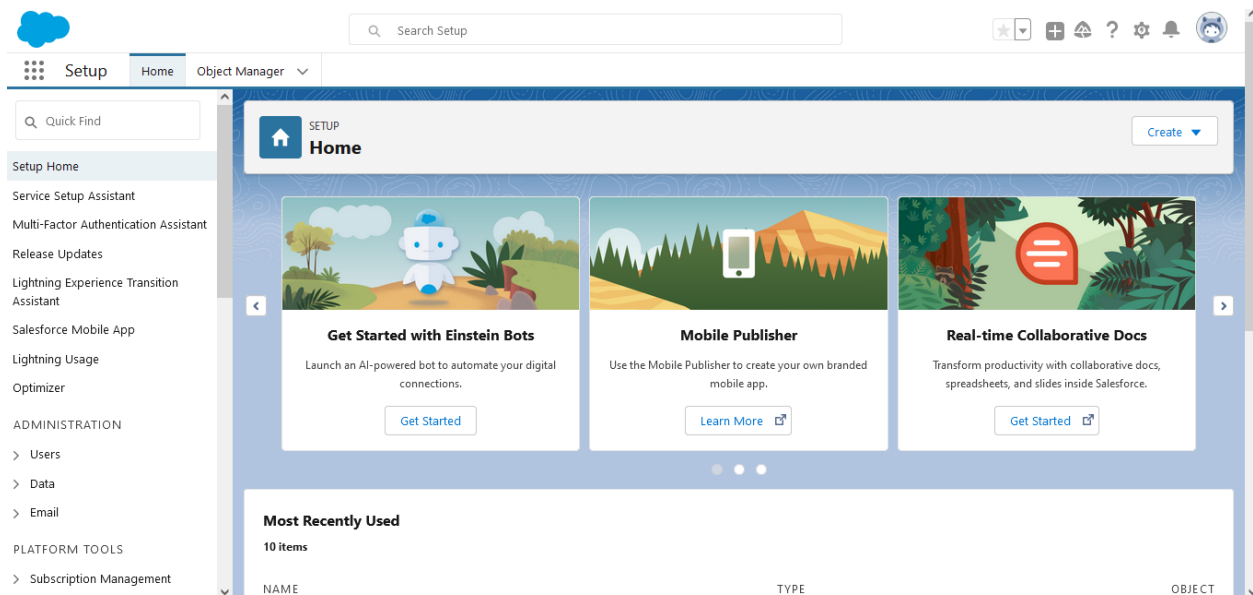
Motivating employees	Developing strategies to increase the turnover rate	Drawing more traffic
Meeting sales goal	Providing customer satisfaction	Improving profitability
Preventing shrinking	Speed	Convenience



Dispatched		
	Field label	Data type
	Dispatch/trackings	Text
	Dispatched	Checkbox
Salesorder		
	Field lable	Data type
	Sales order	Master detail relationship

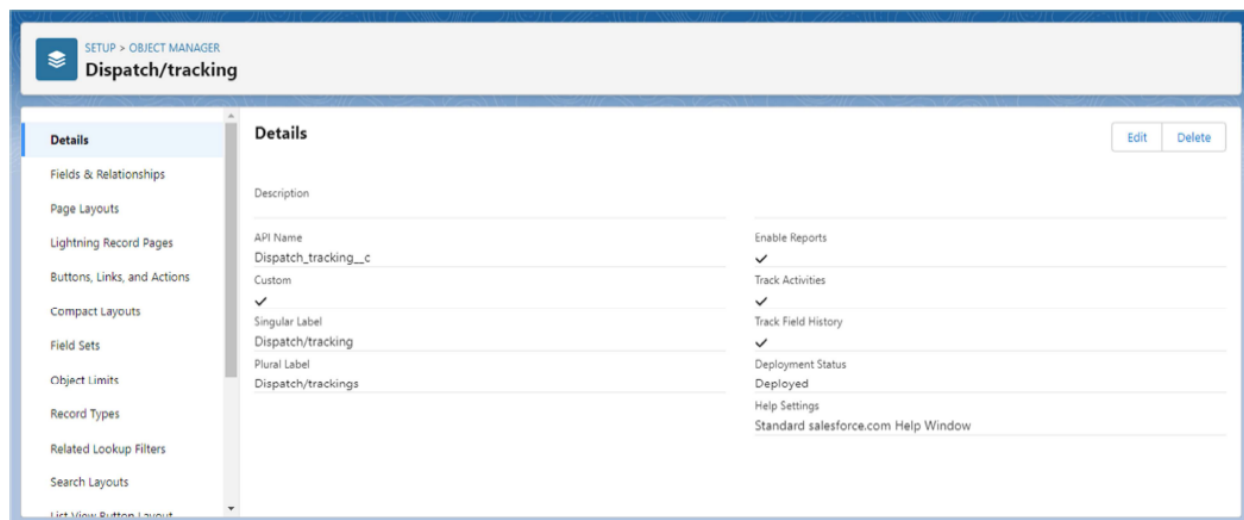
### 3.2 ACTIVITY & SCREENSHOTS

1. Created a Salesforce Developer Org through the website [developer.salesforce.com](https://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.

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

Fields & Relationships

5 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD
Created By	CreatedById	Lookup(User)	
Dispatched	Dispatched__c	Checkbox	
Last Modified By	LastModifiedById	Lookup(User)	
Owner	OwnerId	Lookup(User,Group)	
Tracking ID	Name	Text(80)	

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

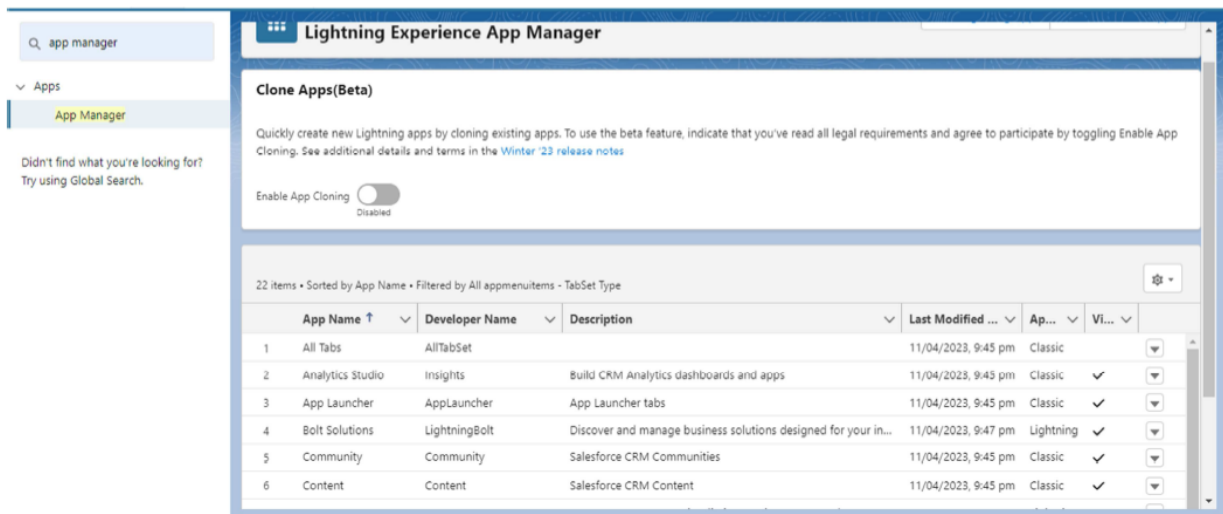
5 Items, Sorted by Field Label

Quick Find

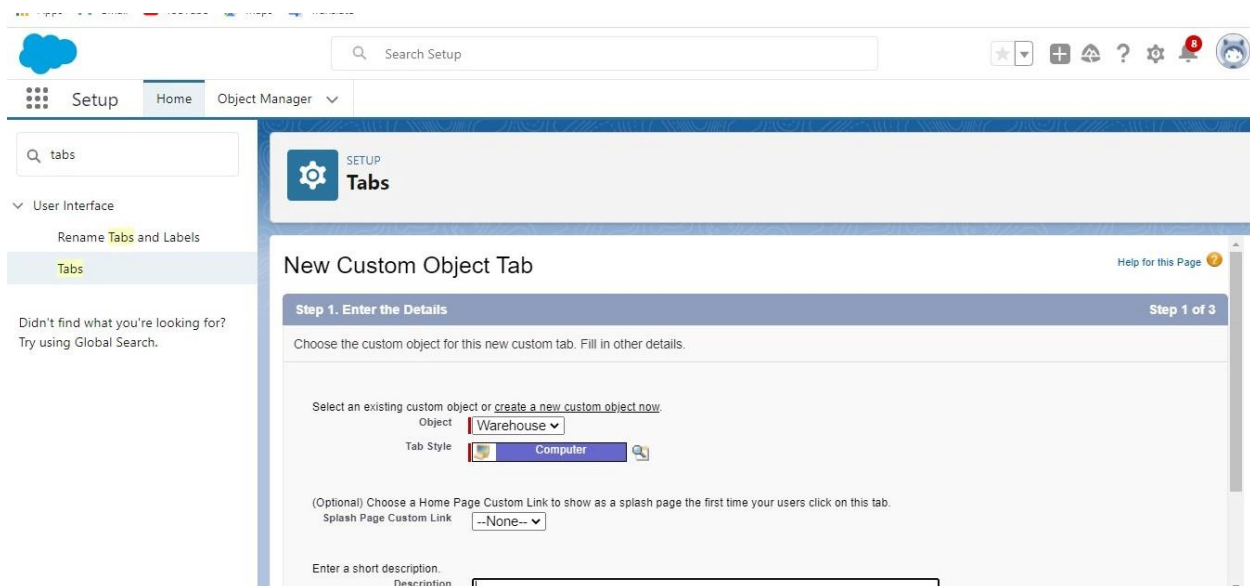
NewDeleted FieldsField DependenciesSet History Tracking

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.



5. Custom Object Tabs was created.



6. Users was created



**Setup** Home Object Manager

Search Setup

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

**Users**

Feature Settings

Data.com

Prospector Users

**SETUP Users**

User **Esakkiammal Karthika**

Permission Set Assignments (0) | Permission Set Assignments Activation Required (0) | Permission Set Group Assignments (0) | Permission Set License Assignments (0) | Personal Groups (0) | Public Group Membership (0) | Queue Membership (0) | Team (0) | Managers in the Role Hierarchy (0) | OAuth Connected Apps (0) | Third-Party Account Links (0) | Installed Mobile Apps (0) | Authentication Settings for External Systems (0) | Login History (0+) | User Provisioning Accounts (0)

**User Detail** Edit Sharing Reset Password Freeze

Name	Esakkiammal Karthika	Role	
Alias	L	User License	Salesforce
Email	karthikalakshmanan67@gmail.com	Profile	Standard User
Username	karthikalakshmanan67@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User16812951161374541503	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address	1	Site.com Contributor User	<input type="checkbox"/>

## 7. Activity 1: Validation rules was created using Account Object

**salesforce** Search... Switch to Lightning Experience Esakkiammal kart... Setup Help Content

Home Chatter Libraries Content Subscriptions Trackings Warehouses Students Parents

**It's Better in Lightning**  
Move to Lightning Experience and give your users a productivity boost.

Tell Me More Check Readiness

Quick Find / Search... Expand All Collapse All

**Lightning Experience Transition Assistant**  
Move to the new, more productive Salesforce.  
Get Started

**Salesforce Mobile Quick Start**

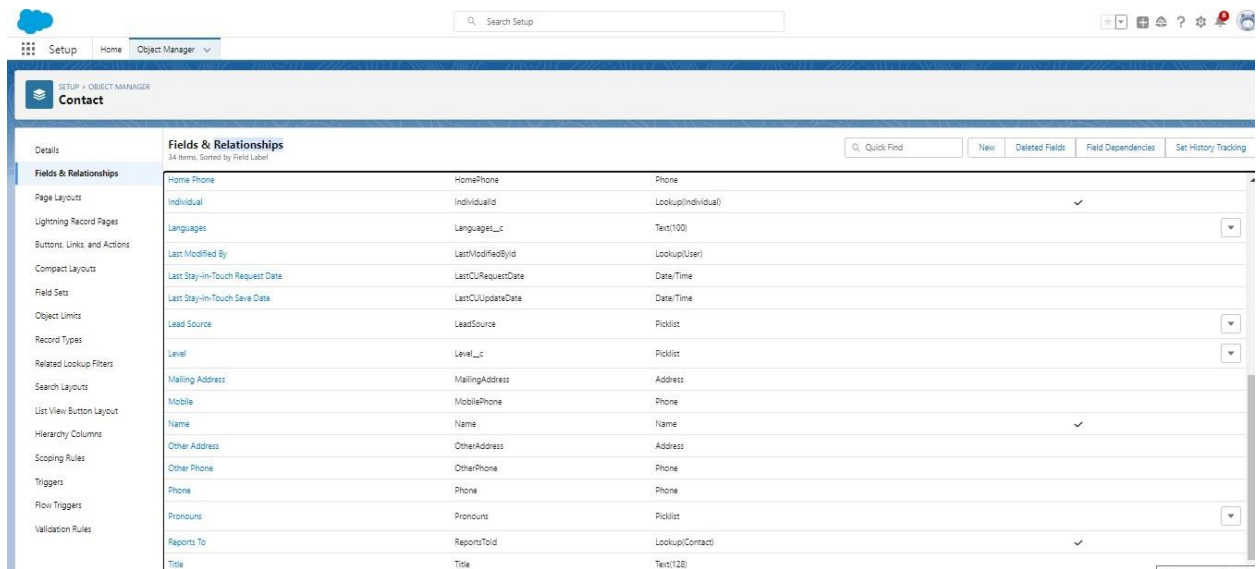
**Account Validation Rule**  
Back to Account Validation Rules

**Validation Rule Detail** Edit Clone

Rule Name	Phone_number_has_international_format	Active	<input checked="" type="checkbox"/>
Error Condition Formula	LEFT(Phone, 1) <> "+"		
Error Message	+91	Error Location	Phone
Description	LEFT(Phone, 1) <> "+"		
Created By	Esakkiammal karthika L, 12/04/2023, 4:36 pm	Modified By	Esakkiammal karthika L, 12/04/2023, 4:36 pm

Edit Clone

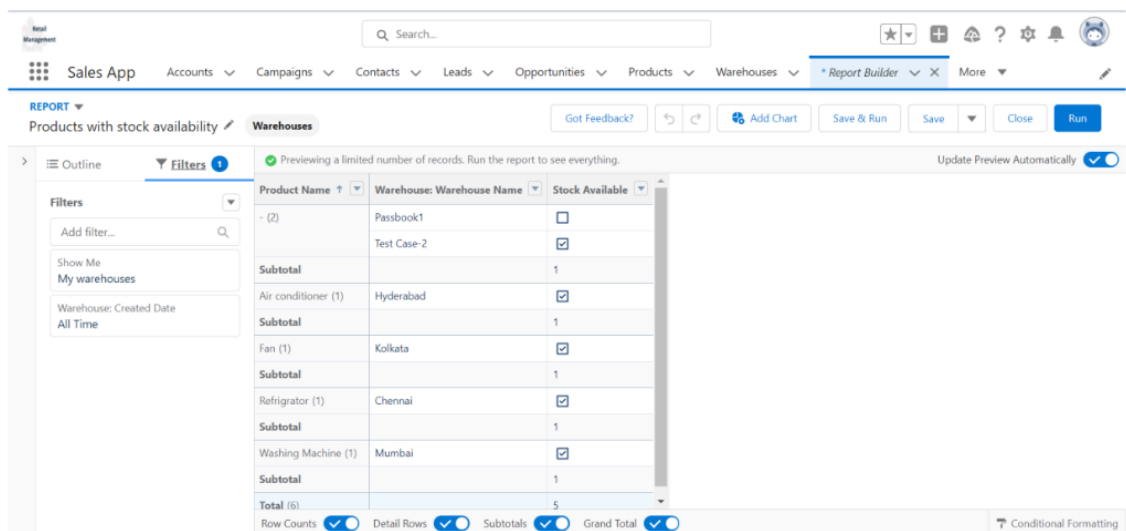
## Activity 2: Cross Object was created using Contact Object



**Fields & Relationships**  
34 Items, Sorted by Field Label

Field Label	Field Name	Field Type	Relationship
Home Phone	HomePhone	Phone	
Individual	IndividualId	Lookup(Individual)	✓
Languages	Languages_c	Text(100)	
Last Modified By	LastModifiedById	Lookup(User)	
Last Stay-in-Touch Request Date	LastCURequestDate	Date/Time	
Last Stay-in-Touch Save Date	LastCUUpdateDate	Date/Time	
Lead Source	LeadSource	Picklist	
Level	Level_c	Picklist	
Mailing Address	MailingAddress	Address	
Mobile	MobilePhone	Phone	
Name	Name	Name	✓
Other Address	OtherAddress	Address	
Other Phone	OtherPhone	Phone	
Phone	Phone	Phone	
Pronouns	Pronouns	Picklist	
Reports To	ReportsToId	Lookup(Contact)	✓
Title	Title	Text(128)	

8.Report was created using Warehouse.



**REPORT**  
Products with stock availability / Warehouses

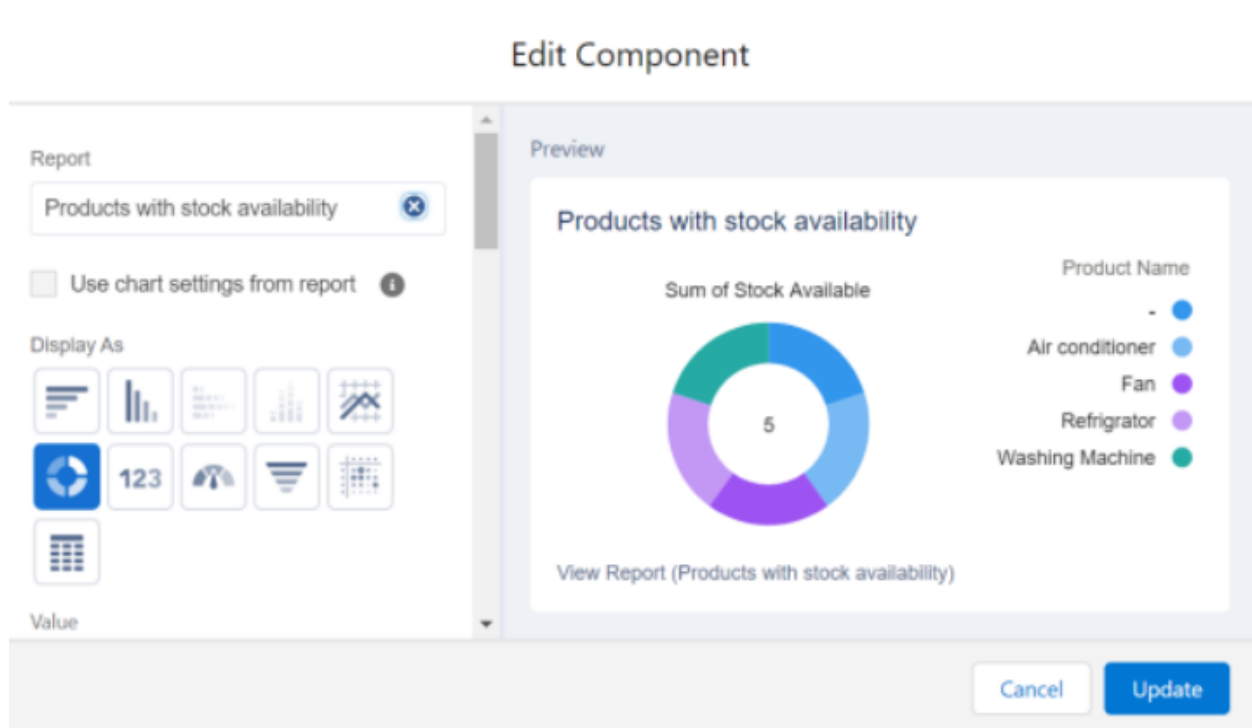
Got Feedback? Add Chart Save & Run Save Close Run

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

Product Name	Warehouse: Warehouse Name	Stock Available
- (2)	Passbook1	<input type="checkbox"/>
	Test Case-2	<input checked="" type="checkbox"/>
<b>Subtotal</b>		1
Air conditioner (1)	Hyderabad	<input checked="" type="checkbox"/>
<b>Subtotal</b>		1
Fan (1)	Kolkata	<input checked="" type="checkbox"/>
<b>Subtotal</b>		1
Refrigerator (1)	Chennai	<input checked="" type="checkbox"/>
<b>Subtotal</b>		1
Washing Machine (1)	Mumbai	<input checked="" type="checkbox"/>
<b>Subtotal</b>		1
<b>Total (6)</b>		5

Row Counts ☒ Detail Rows ☒ Subtotals ☒ Grand Total ☒ Conditional Formatting

9.Dashboards was created using reports.



<https://trailblazer.me/id/ramuk10>

Team Member 4-

<https://trailblazer.me/id/sfarzana7>

## **ADVANTAGES AND 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 process

### **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 fastestgrowing 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.