

PROJECT REPORT

Retail Management Application using Salesforce

1. INTRODUCTION

1.1 Overview

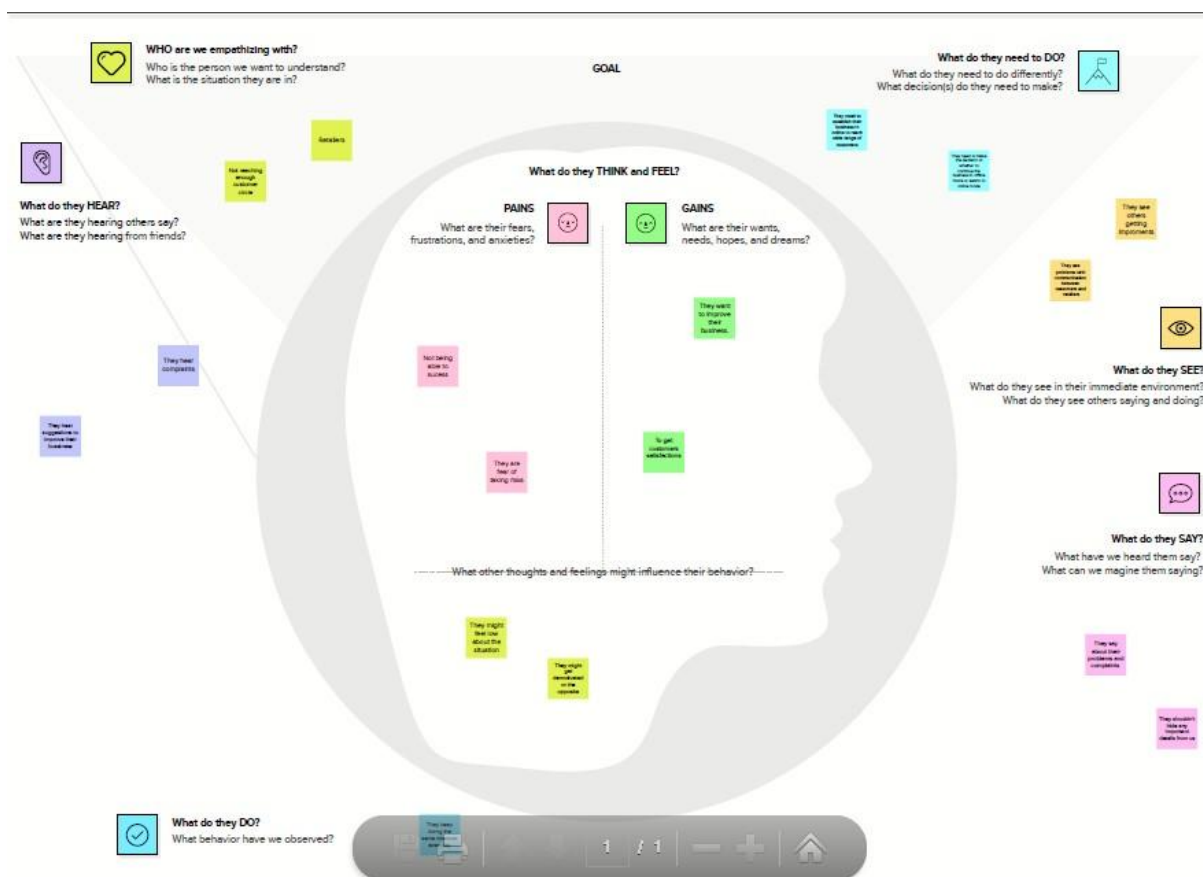
Retail management involves various activities such as inventory management, sales application using Salesforce can automate and streamline these activities, making them more efficient and effective.

1.2 Purpose

The purpose of this project is to create a retail management application using Salesforce that can help retail businesses manage their operations more efficiently. The application will automate various tasks, such as tracking inventory, sales, and customer data, to help save time and reduce errors.

2. PROBLEM DEFINITION & DESIGN THINKING

2.1 Empathy Map



2.2 Ideation & Brainstorming Map



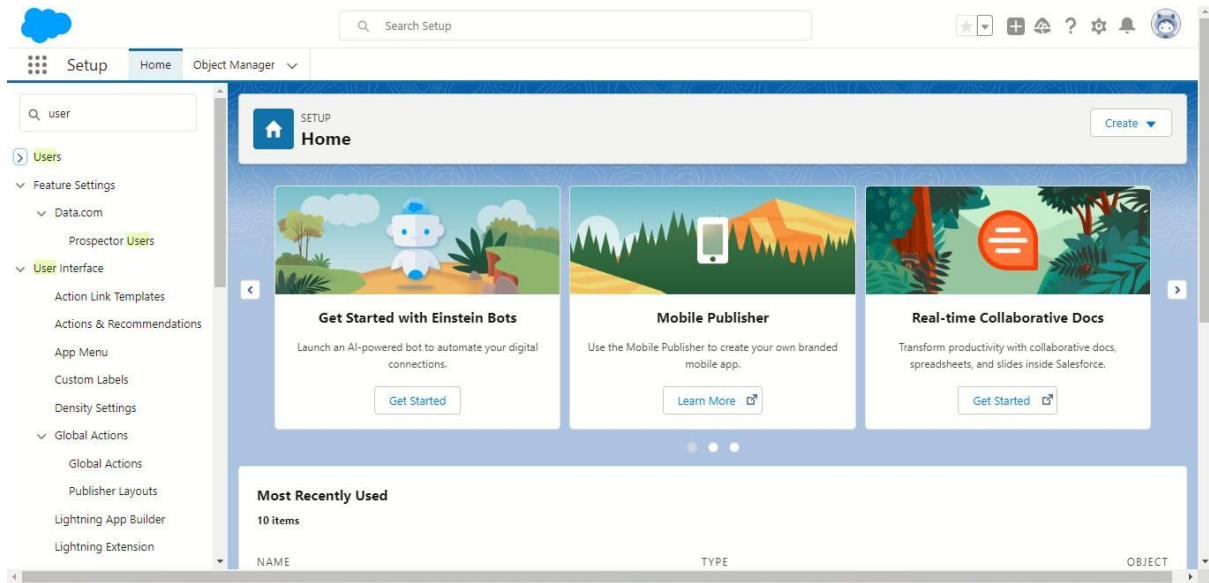
3. RESULT

3.1 Data Model:

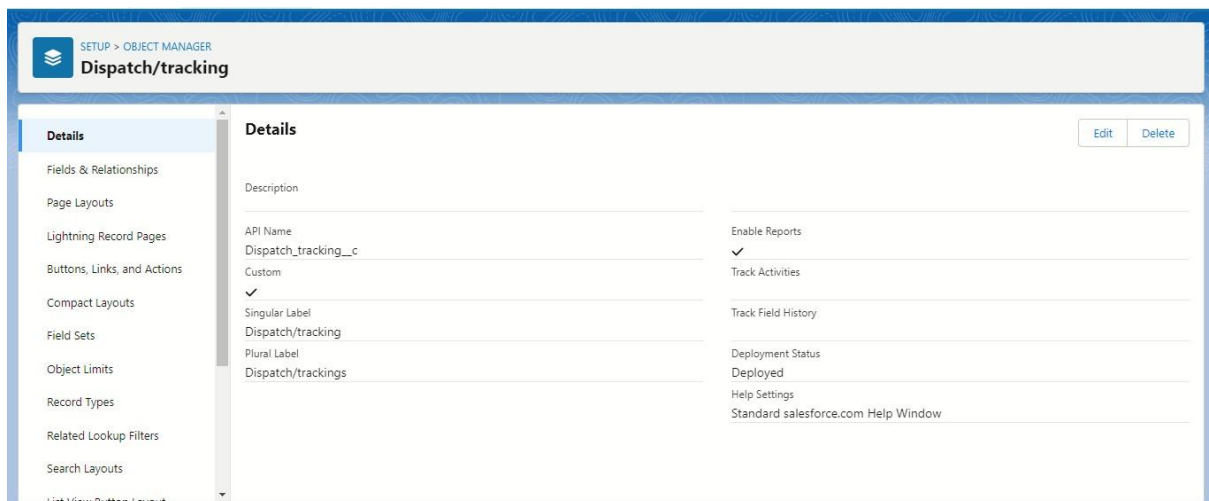
Object name	Fields in the Object	
Sales app	Field label	Data type
	Campaign	We do promotions by using this object
	Leads	We capture leads here
	Accounts	We capture customers data
	contacts	Employees data of customer
	opportunities	SMB sales orders data
	products	Here we store product details i.e electronic 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
Service app	Field label	Data type
	Cases	Historical problems of customers will be stored here
	Accounts	We captures customers data

3.2 Activity and Screenshot

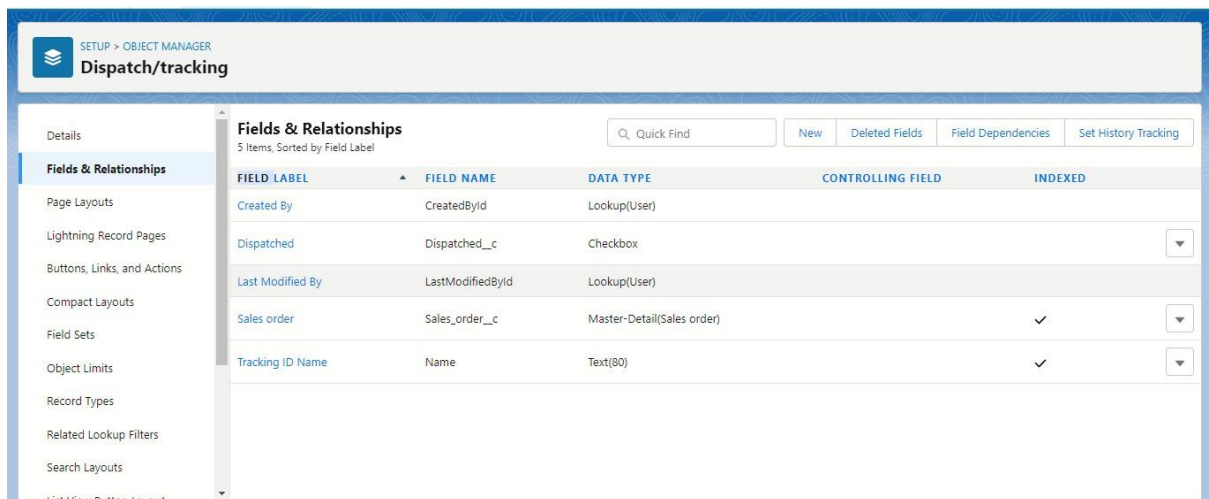
Milestone 1



Milestone 2



Milestone 3



Milestone 4

The screenshot shows the Salesforce interface with the 'Accounts' tab selected. The 'Recently Viewed' section is active, displaying a message: 'You haven't viewed any Accounts recently. Try switching list views.' The page includes a search bar at the top, a navigation menu with options like 'sales order', 'Accounts', 'Contacts', etc., and a table header with columns: 'Account Name', 'Account Site', 'Phone', and 'Account Owner Alias'. There are also buttons for 'New' and 'Import'.

Milestone 5

The screenshot shows the Salesforce Setup page. The 'Setup' tab is selected, and the 'Most Recently Used' list is displayed. The list contains 10 items, showing the name, type, and object of each item. The items are:

NAME	TYPE	OBJECT
Warehouse	Custom Object Definition	
warehouseset	Custom Object Definition	
Languages	Custom Field Definition	Contact
Account Website	Custom Field Definition	Contact
Level	Custom Field Definition	Contact
Phone_number_has_international_format	Validation Rule	Account
Gnanaprakash SV	User	
System Administrator	Profile	
Dispatched	Custom Field Definition	Dispatch/tracking
Sales order	Custom Field Definition	Dispatch/tracking

The left sidebar shows the 'Setup' menu with 'User Interface' expanded, and 'Rename Tabs and Labels' and 'Tabs' options. A search bar at the top of the sidebar contains the text 'tabs'. A message at the bottom of the sidebar says: 'Didn't find what you're looking for? Try using Global Search.'

The screenshot shows the Salesforce Setup interface. On the left, a sidebar contains navigation links: Setup, Home, Object Manager, Users, Feature Settings, Data.com, and User Interface. The 'Users' link is highlighted. The main content area is titled 'Users' and shows a 'User Detail' section for a user named Gnanaprakash SV. The detail section includes fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Delegated Approver, Manager, Receive Approval Request Emails, Federation ID, App Registration, and SSO Registration. The right side of the detail section shows the user's Role (Salesforce), License (Standard User), Profile (Marketing User), and various permissions (Active, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Push Registrations, Data.com User Type, Accessibility Mode, Debug Mode, High-Contrast Palette on Charts, Load Lightning Pages While Scrolling, and Salesforce CRM Content User).

Team Lead – <https://trailblazer.me/id/gnasv>
Team member 1 - <https://trailblazer.me/id/sangth>
Team member 2 - <https://trailblazer.me/id/pravku>
Team member 3 - <https://trailblazer.me/id/sigaa>

The retail management process will be more streamlined, saving retailers time and effort. The application will help retailers reduce errors and ensure that all operations are properly managed.

Automated reminders and notifications will ensure that retailers are aware of low stock levels, upcoming sales, and other important events.

The application will allow retailers to better track and manage their operations, increasing their operational efficiency.

6. APPLICATIONS

The application can be used by retail businesses of all sizes to help manage their operations.

The system can be customized to fit the specific needs of the business, allowing for greater flexibility.

The application can also be used by individual store owners to manage their own operations

7. CONCLUSION

A retail management application using Salesforce can greatly improve the efficiency and effectiveness of retail businesses. With automated tasks and reminders, retailers can focus on the most important aspects of their job, such as maintaining customer satisfaction and managing their operations effectively.

8. FUTURE SCOPE

The application can be expanded to include additional features, such as integration with accounting software, to create a complete retail management system.

Additionally, the system can be integrated with other retail software to create a comprehensive retail management system. This application can also be used to manage other types of businesses such as restaurants or service-based businesses.