RETAIL MANAGEMENT APPLICATION USING SALSEFORCE

Bees

1. INTRODUCTION:

1.1 Overview:

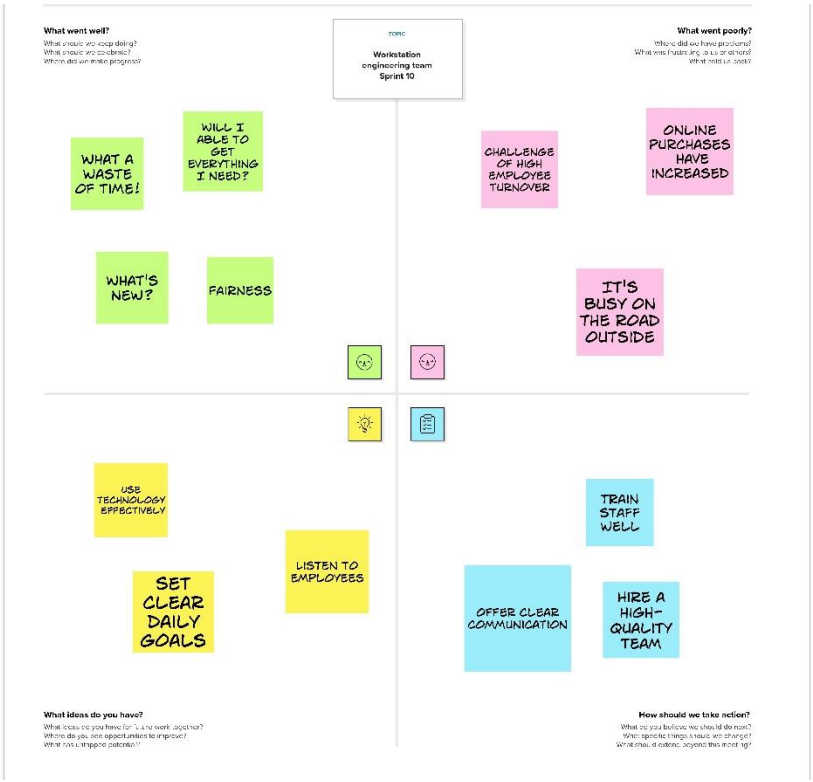
Our Bees retail store app is a digital software solution that helps business owners and store managers streamline their daily processes straight from their mobile devices. It can include a variety of features for managing your employees, inventory, customer relations, and point of sale (POS) activities.

1.2 Purpose:

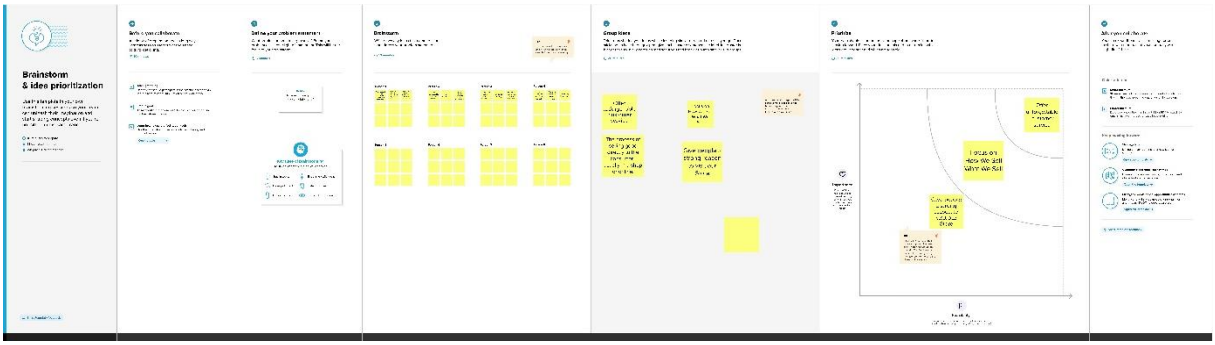
New stores are popping up fast. To succeed in this environment, you need to give customers exactly what they want, fast, and provide a great shopping experience. That’s where retail management comes in.

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

Dispatch

Field label	Data type
Created By	Lookup(User)
Dispatched/Tracking	Text(80)
Last Modified By	Lookup(User)
Owner	Lookup(User,Group)

Customer

Field label	Data type
Account Name	Text(80)
Created By	Lookup(User)
Dispatch	Checkbox
Last Modified By	Lookup(User)
Order	Picklist
Order_date	Date
Warehouse	Master-Detail(Warehouse)

Parent

FIELD LABEL	DATA TYPE
Created By	Lookup(User)
Last Modified By	Lookup(User)
Owner	Lookup(User,Group)
Parent Name	Text(80)

Product

FIELD LABEL	DATA TYPE
Contract Line Item	Master-Detail(Contract Line Item)
Created By	Lookup(User)
Last Modified By	Lookup(User)
Products Name	Text(80)
products_in_warehouse	Formula (Text)
Warehouse	Master-Detail(Warehouse)

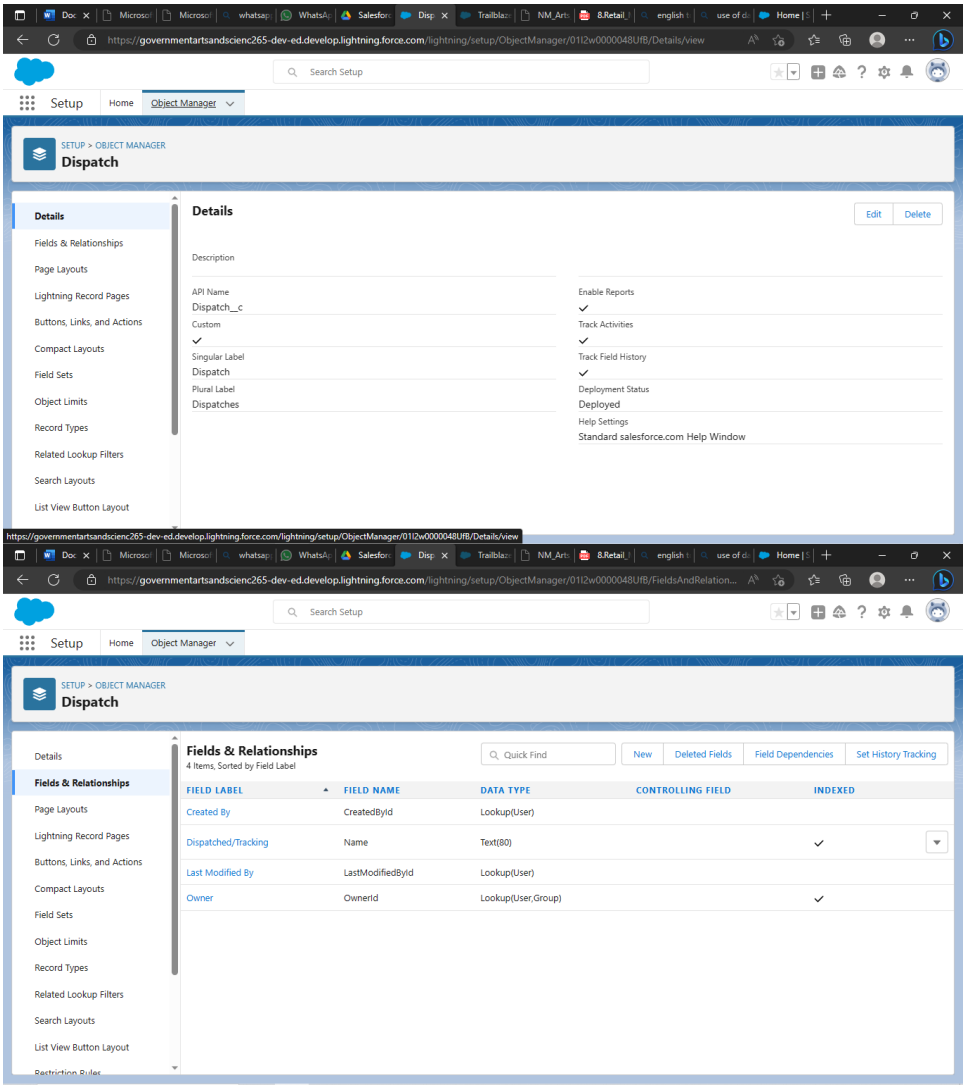
Student

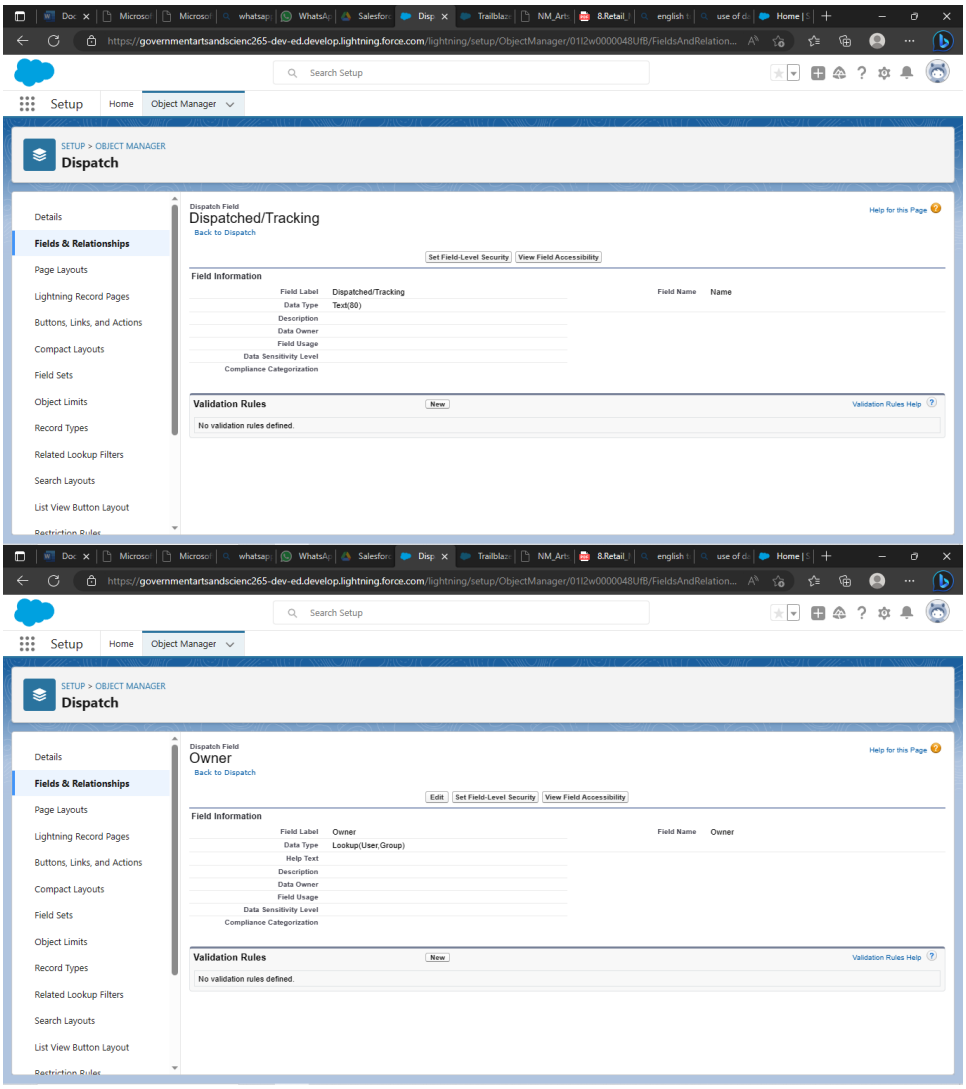
FIELD LABEL	DATA TYPE
Account_Website	Formula (Text)
Contact	Master-Detail(Contact)
Created By	Lookup(User)
Last Modified By	Lookup(User)
Student Name	Text(80)

Warehouse

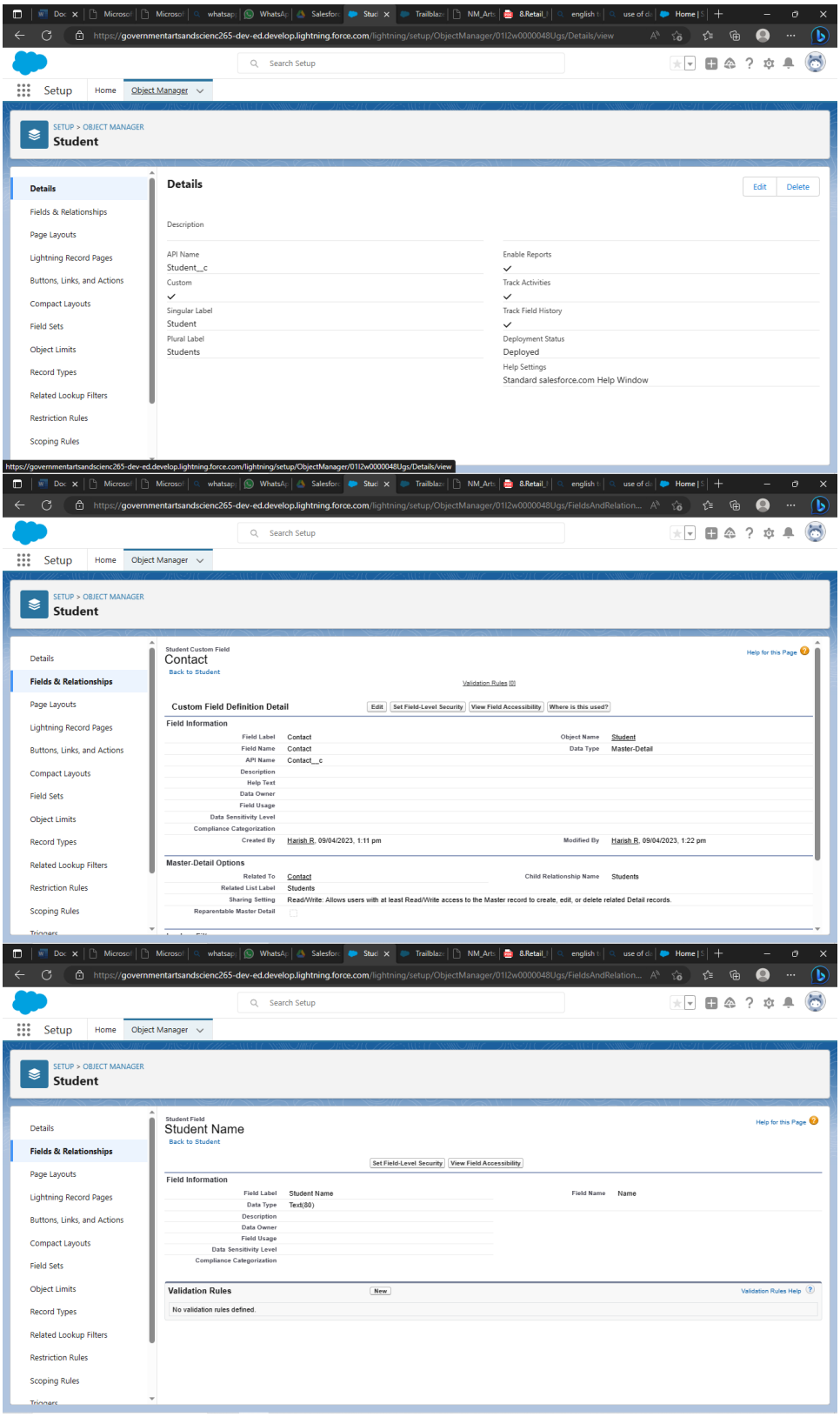
FIELD LABEL	DATA TYPE
Created By	Lookup(User)
Last Modified By	Lookup(User)
Owner	Lookup(User,Group)
Product name	Text(250)
Stock available	Checkbox
Warehouse	Text(80)

3.2 Activity & Screenshot:

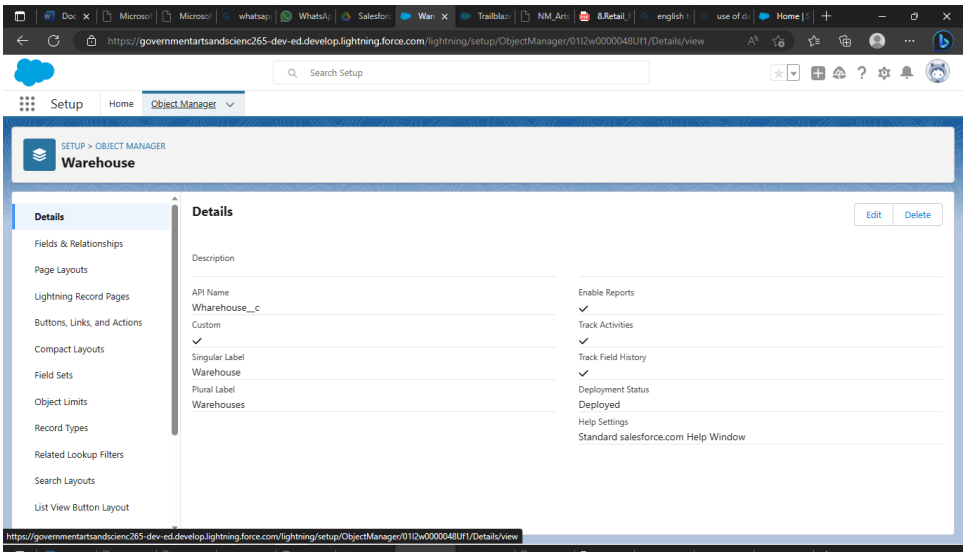


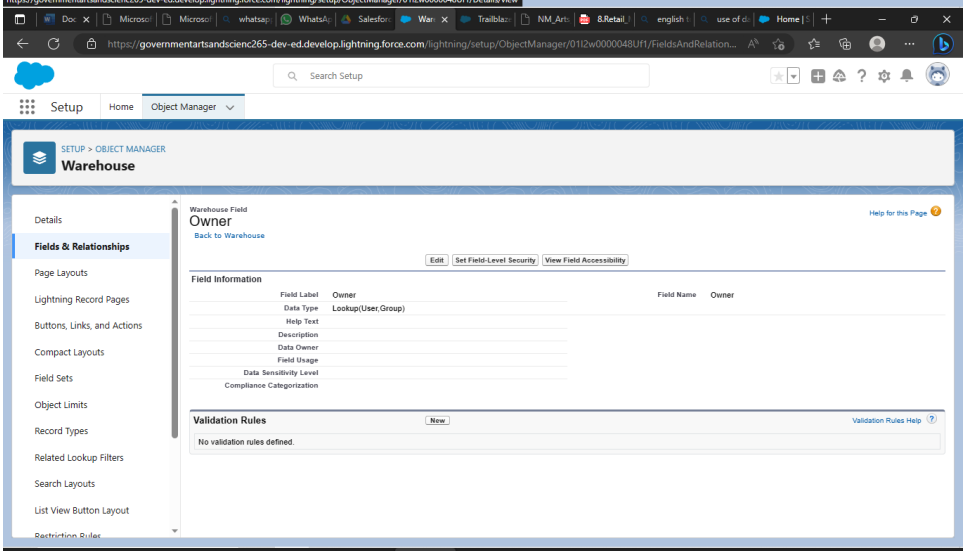


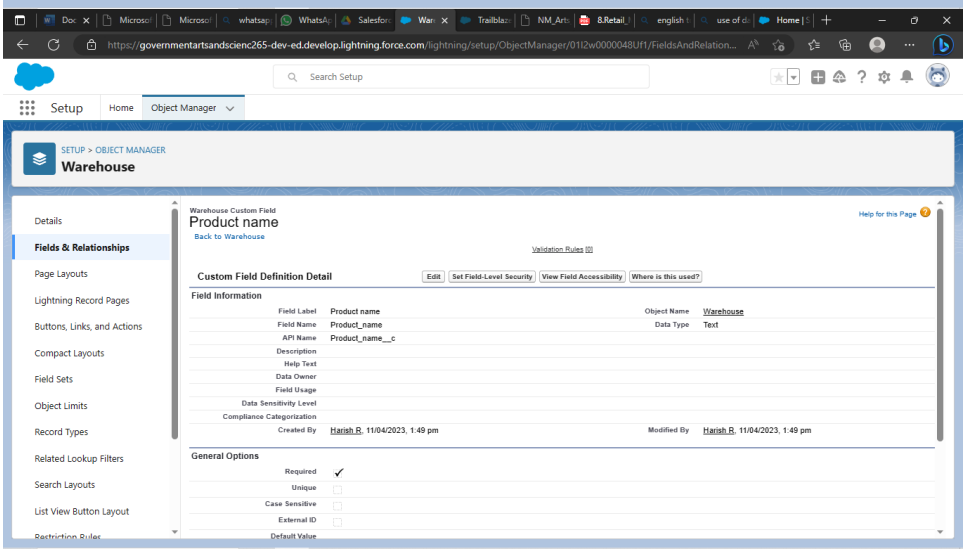
This is dispatch object. Orders dispatch related info will be stored here.

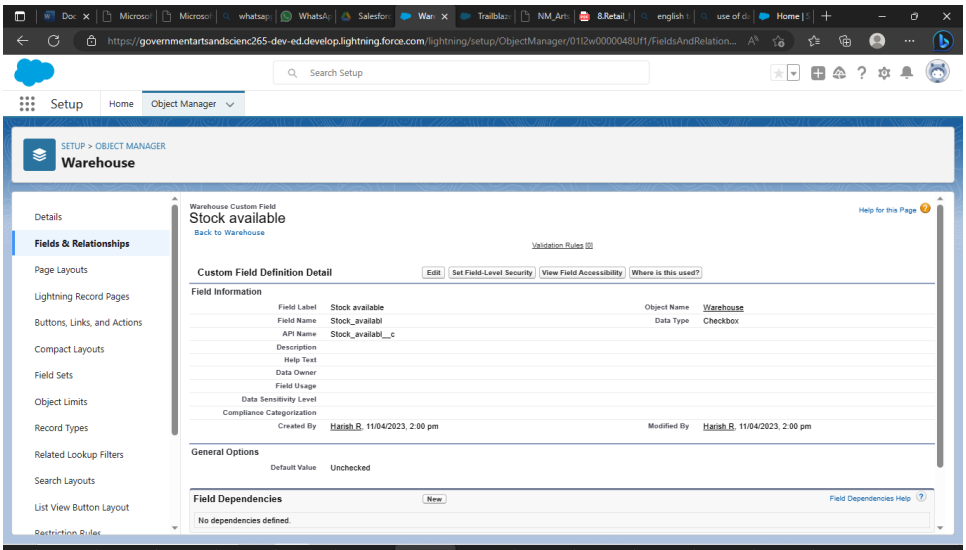


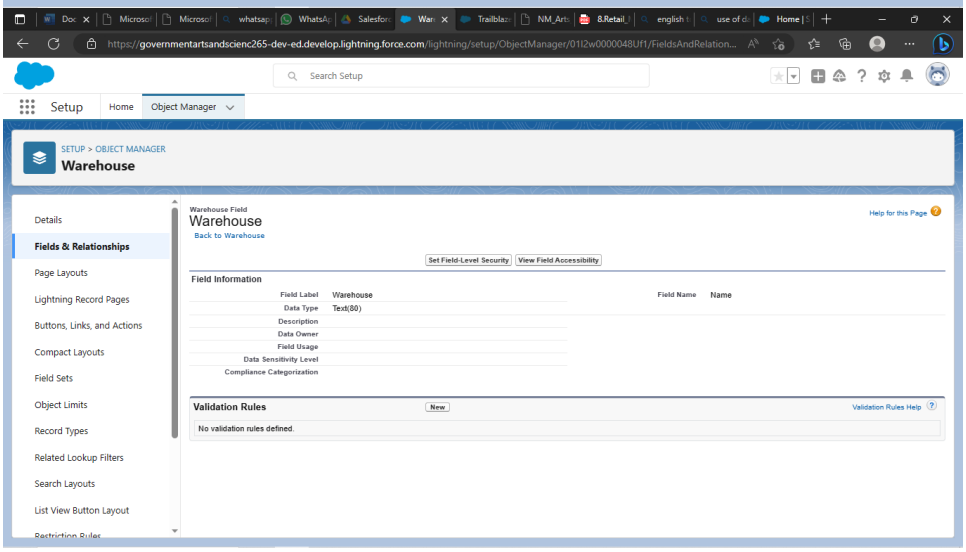
This is student object . It is created for students.

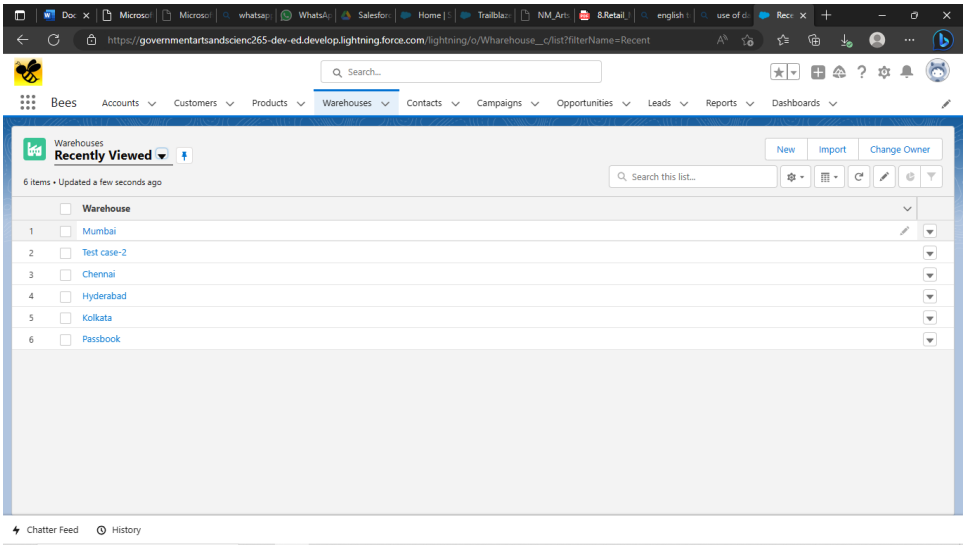

Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Warehouse
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Details
Edit
Delete
Description
API Name
Wharehouse__c
Custom
Singular Label
Warehouse
Plural Label
Warehouses
Enable Reports
Track Activities
Track Field History
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window


Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Warehouse
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
Warehouse Field
Owner
Back to Warehouse
Help for this Page
Edit
Set Field-Level Security
View Field Accessibility
Field Information
Field Label
Owner
Field Name
Owner
Data Type
Lookup(User,Group)
Help Text
Description
Data Owner
Field Usage
Data Sensitivity Level
Compliance Categorization
Validation Rules
New
Validation Rules Help
No validation rules defined.

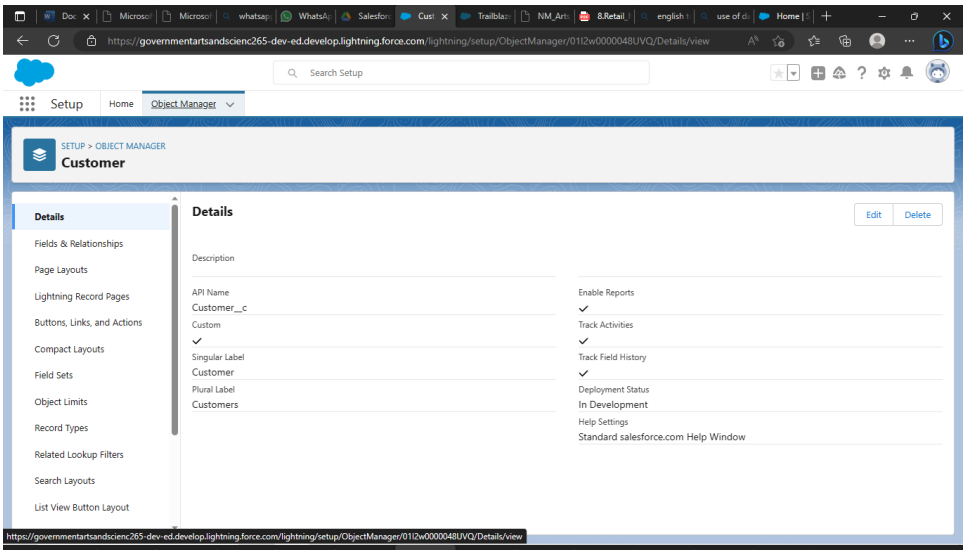

Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Warehouse
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Warehouse Custom Field
Product name
Back to Warehouse
Help for this Page
Validation Rules
Custom Field Definition Detail
Edit
Set Field-Level Security
View Field Accessibility
Where is this used?
Field Information
Field Label
Product name
Object Name
Warehouse
Field Name
Product_name
Data Type
Text
API Name
Product_name__c
Description
Help Text
Data Owner
Field Usage
Data Sensitivity Level
Compliance Categorization
Created By
Harish R, 11/04/2023, 1:49 pm
Modified By
Harish R, 11/04/2023, 1:49 pm
General Options
Required
Unique
Case Sensitive
External ID
Default Value







This is warehouse object. We capture stocks data


Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Customer
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
Details
Edit
Delete
Description
API Name
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Plural Label
Customers
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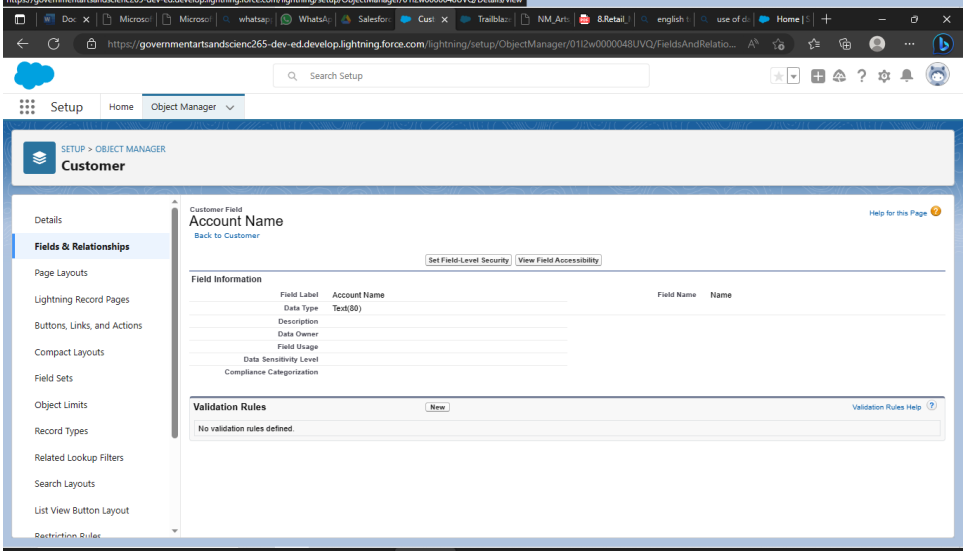
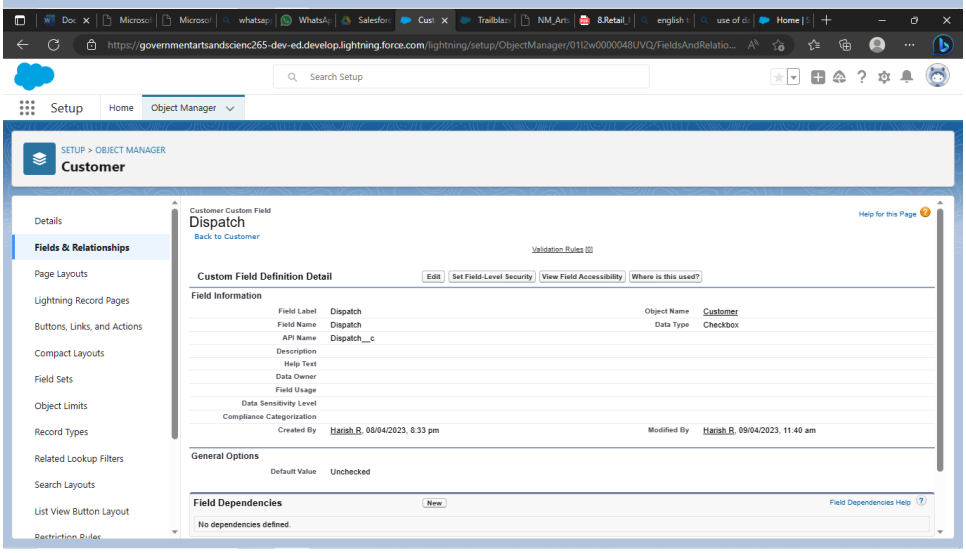
Track Activities
Track Field History
Deployment Status
In Development
Help Settings
Standard salesforce.com Help Window


Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Customer
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
Customer Field
Account Name
Back to Customer
Help for this Page
Set Field-Level Security
View Field Accessibility
Field Information
Field Label
Account Name
Field Name
Name
Data Type
Text(80)
Description
Data Owner
Field Usage
Data Sensitivity Level
Compliance Categorization
Validation Rules
New
Validation Rules Help
No validation rules defined.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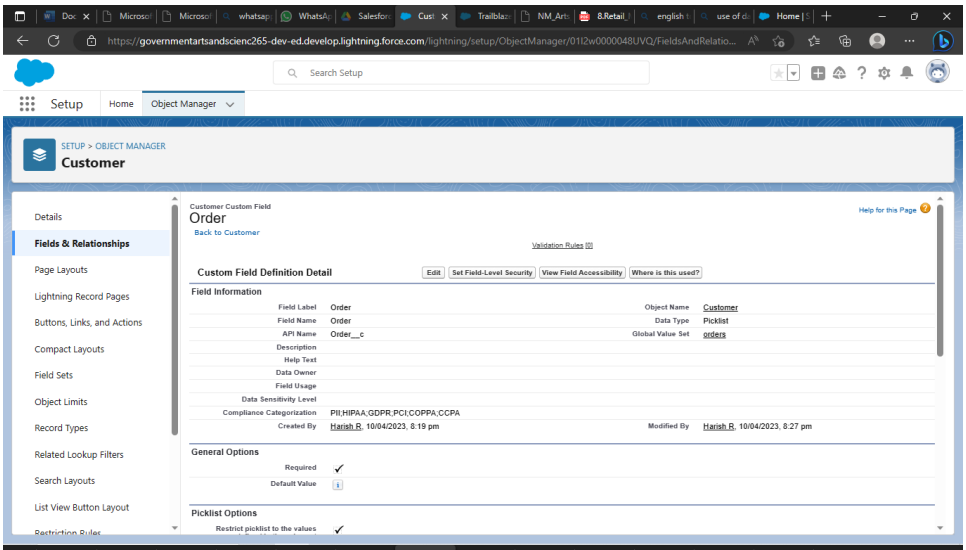
Home
Object Manager
SETUP > OBJECT MANAGER
Customer
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Customer Custom Field
Dispatch
Back to Customer
Help for this Page
Validation Rules
Custom Field Definition Detail
Edit
Set Field-Level Security
View Field Accessibility
Where is this used?
Field Information
Field Label
Dispatch
Field Name
Dispatch
API Name
Dispatch__c
Description
Help Text
Data Owner
Field Usage
Data Sensitivity Level
Compliance Categorization
Created By
Harish R, 08/04/2023, 8:33 pm
Object Name
Customer
Data Type
Checkbox
Modified By
Harish R, 09/04/2023, 11:40 am
General Options
Default Value
Unchecked
Field Dependencies
New
Field Dependencies Help
No dependencies defined.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Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Customer
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
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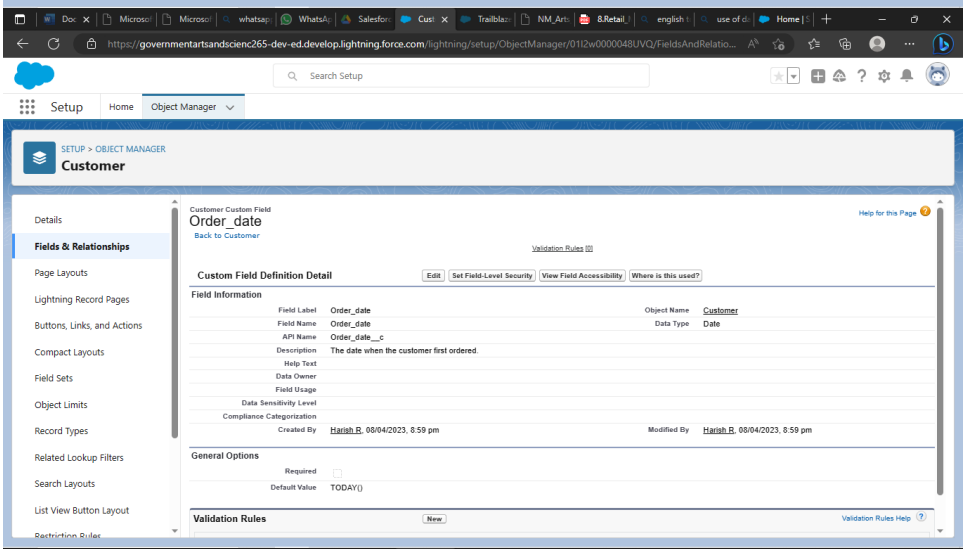
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Customer Custom Field
Order
Back to Customer
Help for this Page
Validation Rules
Custom Field Definition Detail
Edit
Set Field-Level Security
View Field Accessibility
Where is this used?
Field Information
Field Label Order
Field Name Order
API Name Order__c
Description
Help Text
Data Owner
Field Usage
Data Sensitivity Level
Compliance Categorization PII;HIPAA;GDPR;PCI;COPPA;CCPA
Created By Harish R, 10/04/2023, 8:19 pm
Object Name Customer
Data Type Picklist
Global Value Set orders
Modified By Harish R, 10/04/2023, 8:27 pm
General Options
Required
Default Value
Picklist Options
Restrict picklist to the values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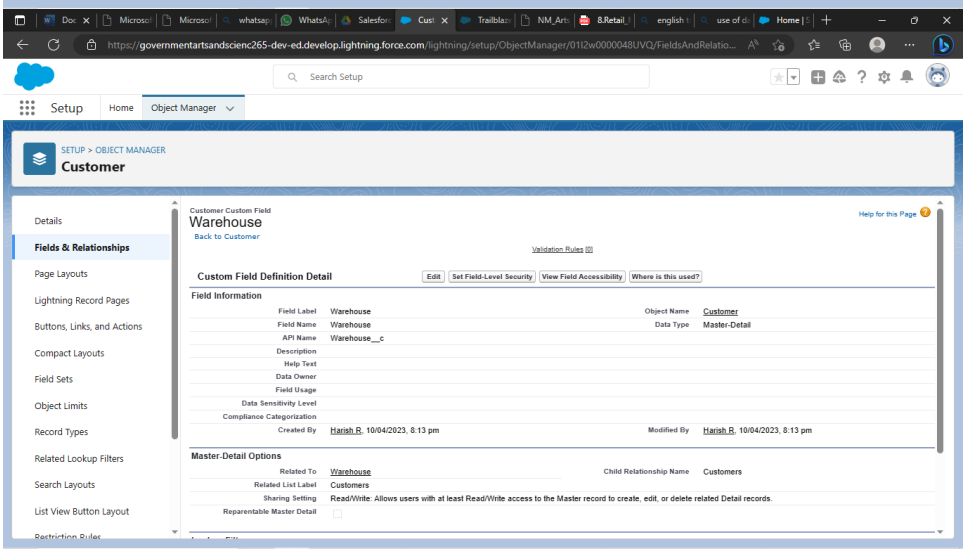
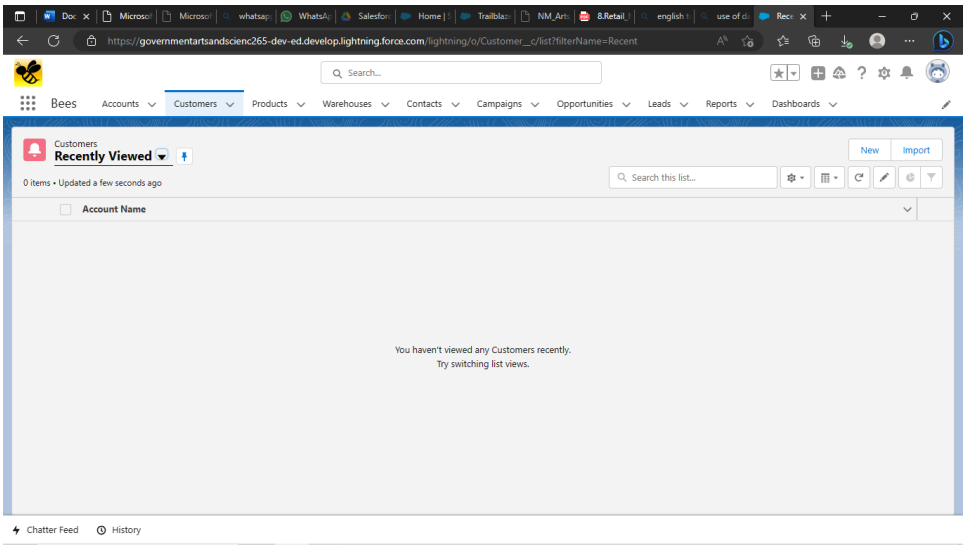
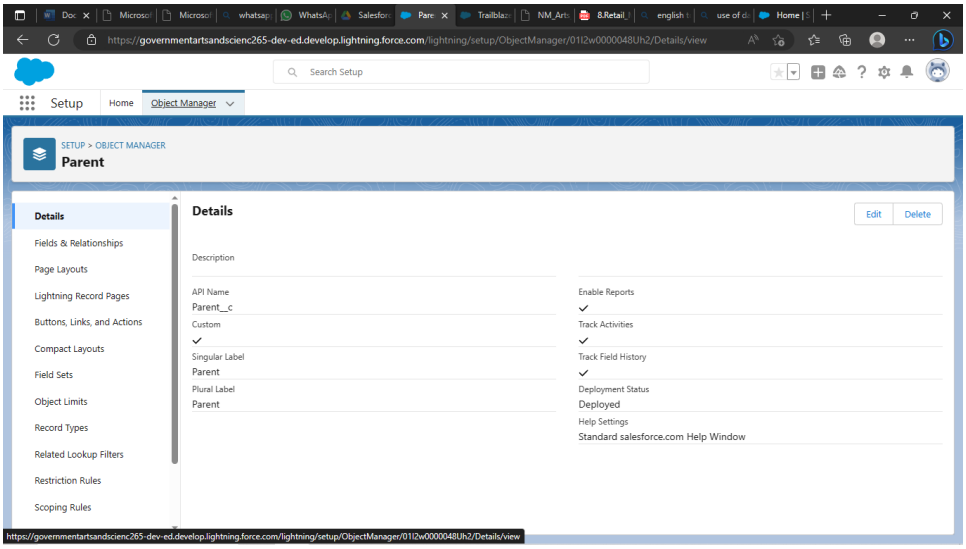
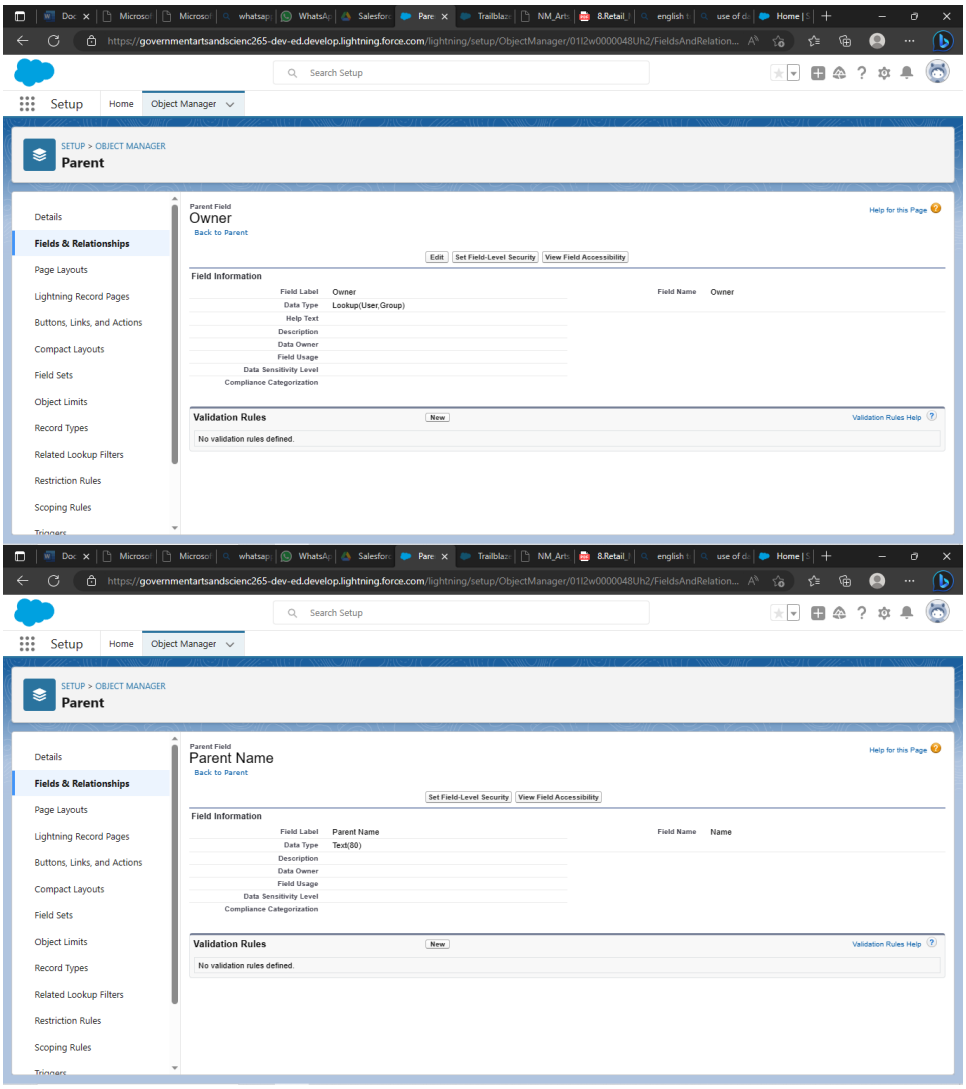
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Customer
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Customer Custom Field
Order_date
Back to Customer
Help for this Page
Validation Rules
Custom Field Definition Detail
Edit
Set Field-Level Security
View Field Accessibility
Where is this used?
Field Information
Field Label Order_date
Field Name Order_date
API Name Order_date__c
Description The date when the customer first ordered.
Help Text
Data Owner
Field Usage
Data Sensitivity Level
Compliance Categorization
Created By Harish R, 08/04/2023, 8:59 pm
Object Name Customer
Data Type Date
Modified By Harish R, 08/04/2023, 8:59 pm
General Options
Required
Default Value TODAY()
Validation Rules
New
Validation Rules Help


Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Customer
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
Customer Custom Field
Warehouse
Back to Customer
Help for this Page
Validation Rules
Custom Field Definition Detail
Edit
Set Field-Level Security
View Field Accessibility
Where is this used?
Field Information
Field Label Warehouse
Field Name Warehouse
API Name Warehouse__c
Description
Help Text
Data Owner
Field Usage
Data Sensitivity Level
Compliance Categorization
Created By Harish R, 10/04/2023, 8:13 pm
Object Name Customer
Data Type Master-Detail
Modified By Harish R, 10/04/2023, 8:13 pm
Master-Detail Options
Related To Warehouse
Related List Label Customers
Sharing Setting Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.
Reparentable Master Detail
Child Relationship Name Customers

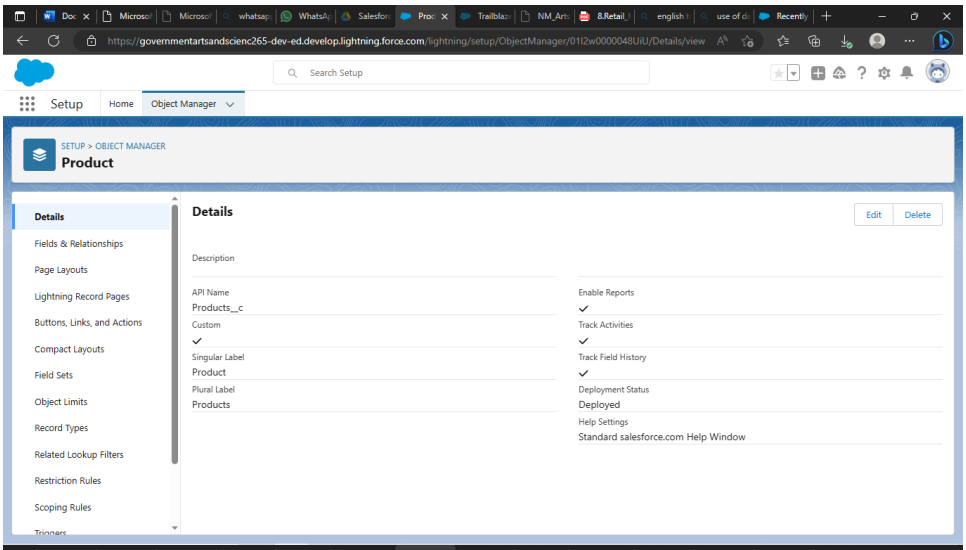


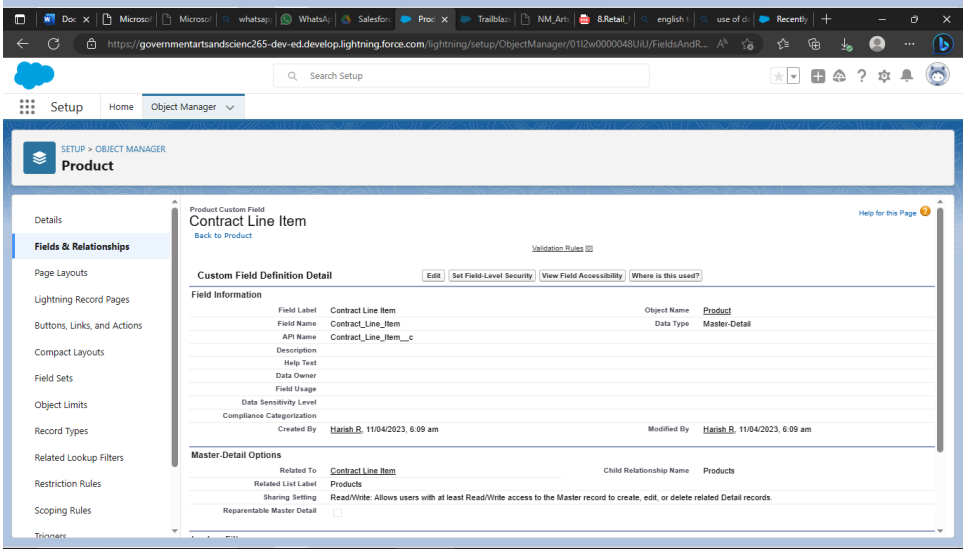
These are customer object and page. We see the customers.

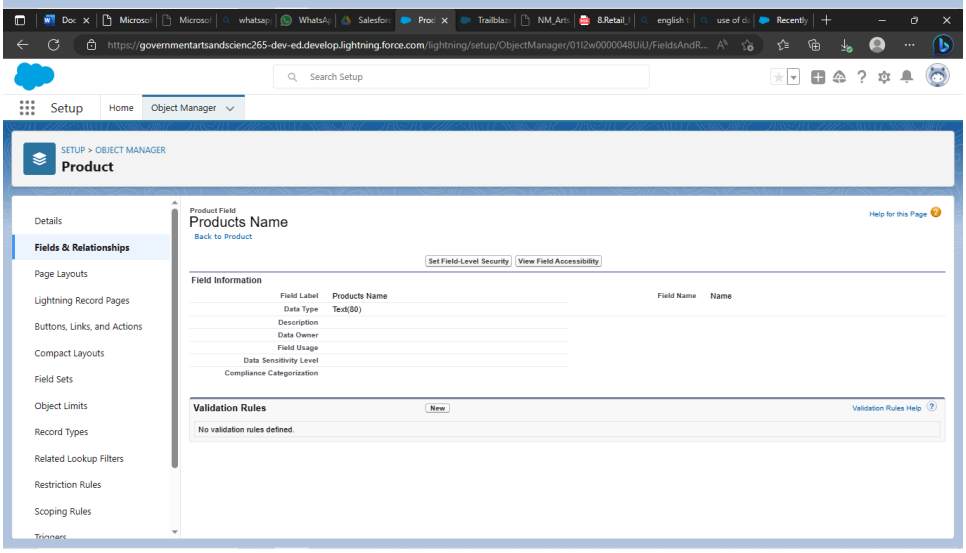




This is a parent object .


Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Product
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Details
Edit
Delete
Description
API Name
Products__c
Custom
Singular Label
Product
Plural Label
Products
Enable Reports
Track Activities
Track Field History
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window


Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Product
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Product Custom Field
Contract Line Item
Back to Product
Help for this Page
Validation Rules [0]
Custom Field Definition Detail
Edit
Set Field-Level Security
View Field Accessibility
Where is this used?
Field Information
Field Label
Contract Line Item
Field Name
Contract_Line_Item
API Name
Contract_Line_Item__c
Description
Help Text
Data Owner
Field Usage
Data Sensitivity Level
Compliance Categorization
Created By
Harish R, 11/04/2023, 6:09 am
Object Name
Product
Data Type
Master-Detail
Modified By
Harish R, 11/04/2023, 6:09 am
Master-Detail Options
Related To
Contract Line Item
Related List Label
Products
Sharing Setting
Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.
Reparentable Master Detail
Child Relationship Name
Products


Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Product
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Product Field
Products Name
Back to Product
Help for this Page
Set Field-Level Security
View Field Accessibility
Field Information
Field Label
Products Name
Data Type
Text(80)
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Data Owner
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Data Sensitivity Level
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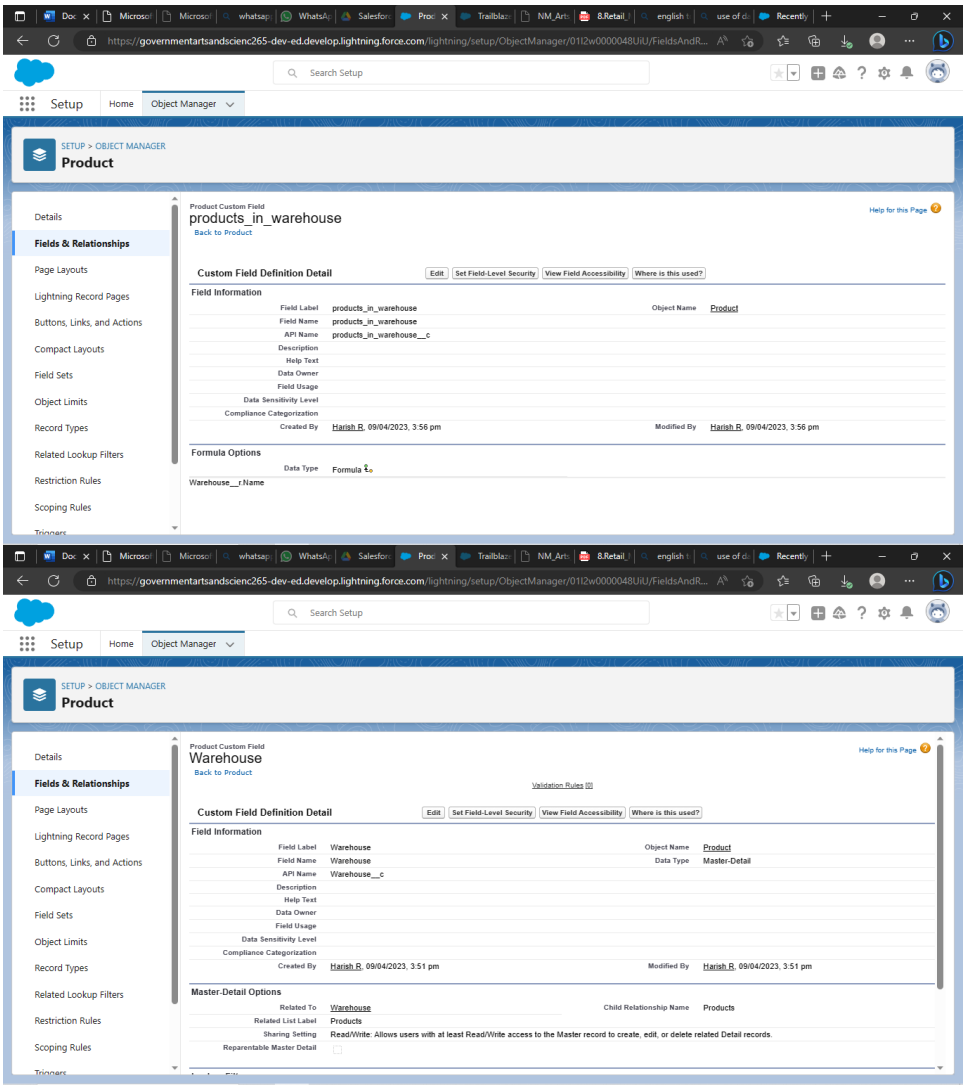
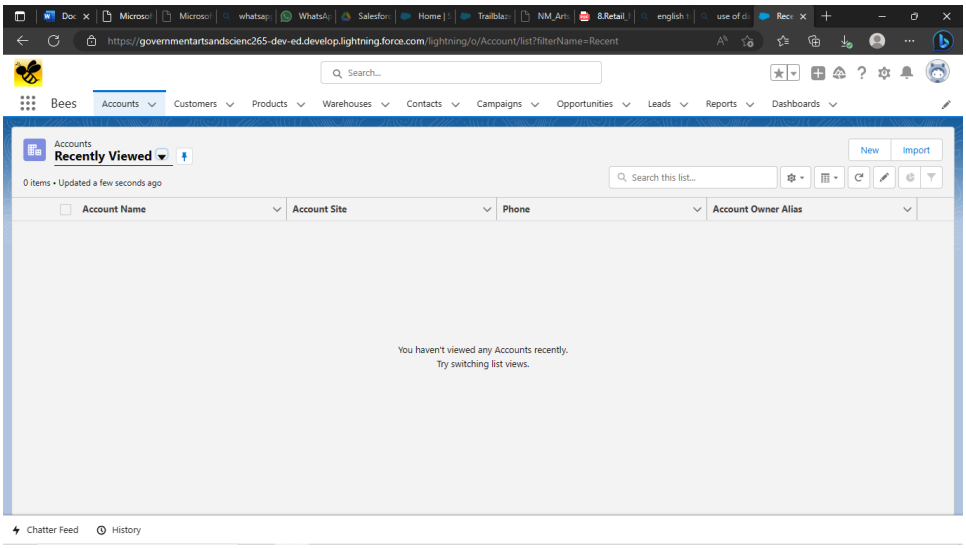
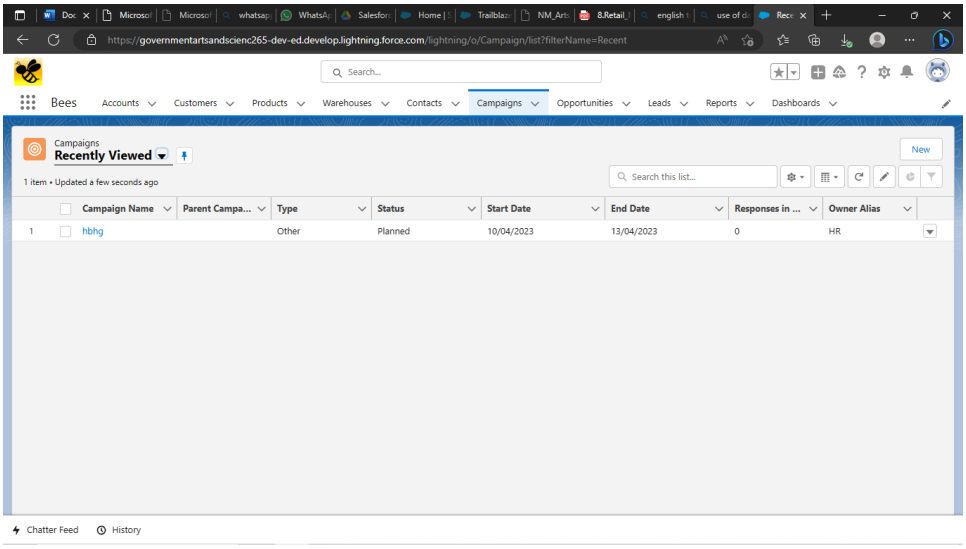
Field Name
Name
Validation Rules
New
Validation Rules Help
No validation rules defined.



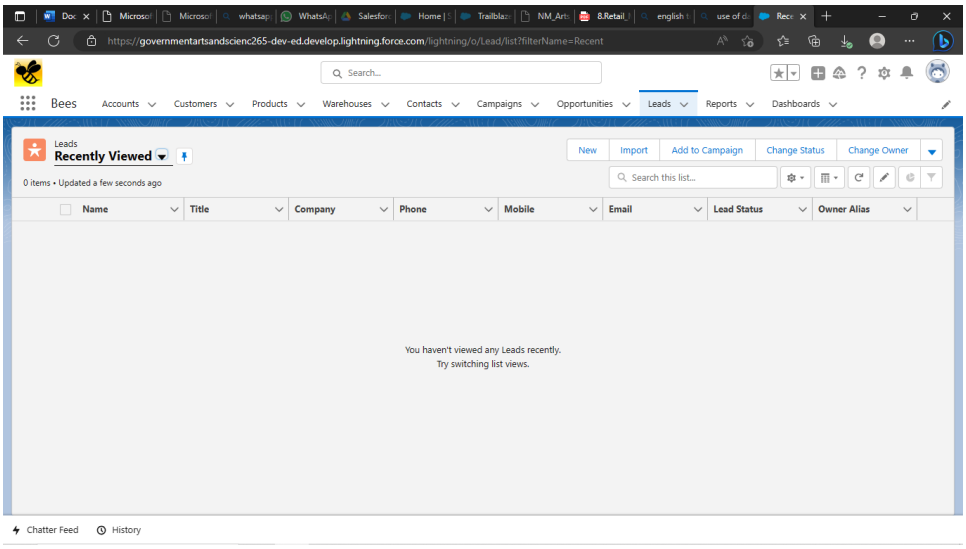
This is product object. Here we store product details i.e electronic types



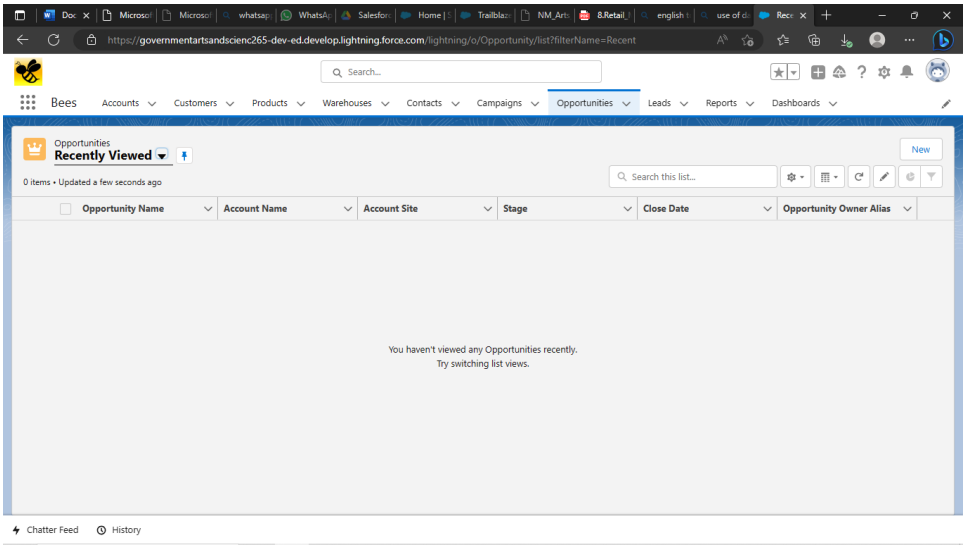
This is account object. We capture customers data.



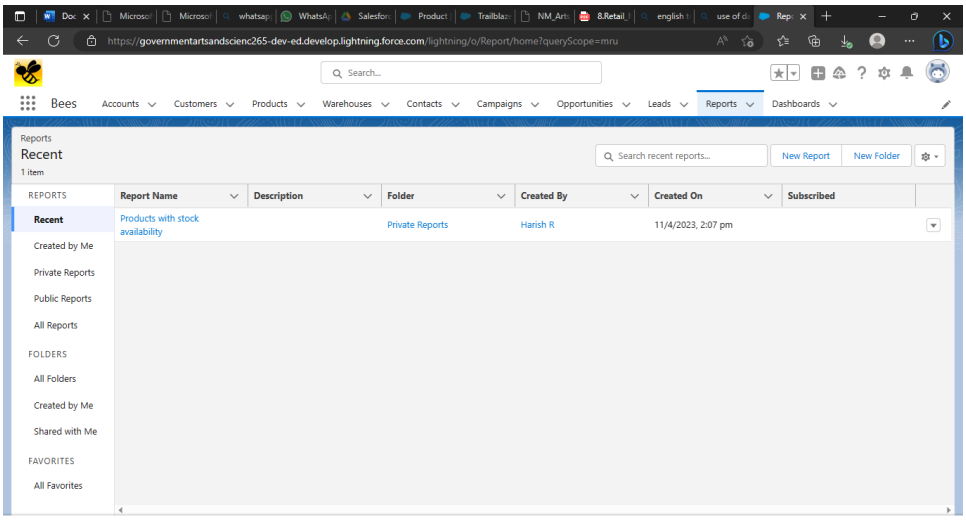
This is campaign object. We do promotions by using this object.

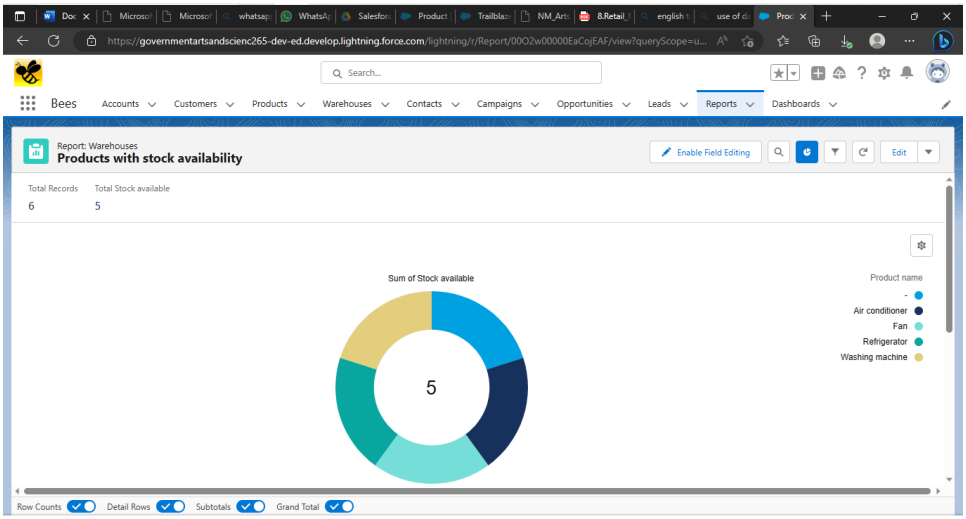


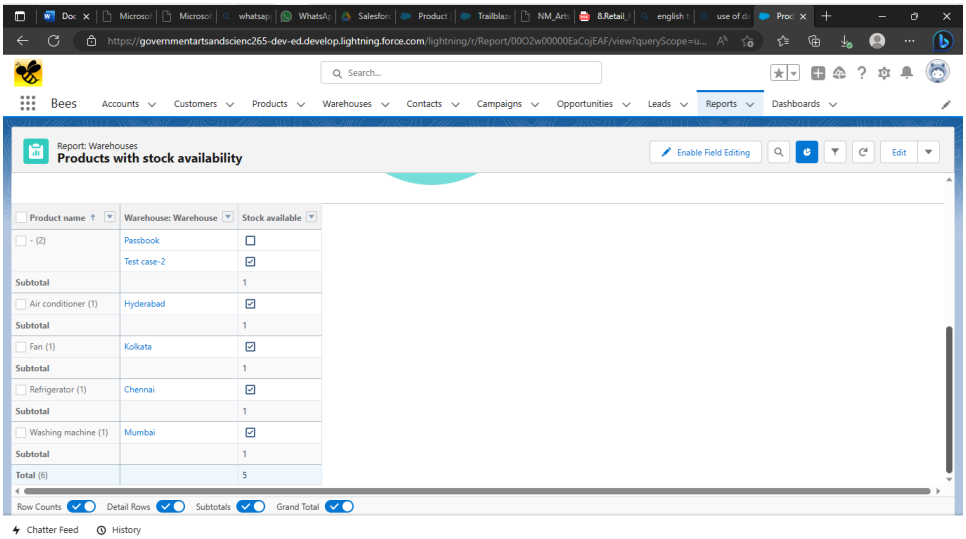
This is leads object. We capture leads here



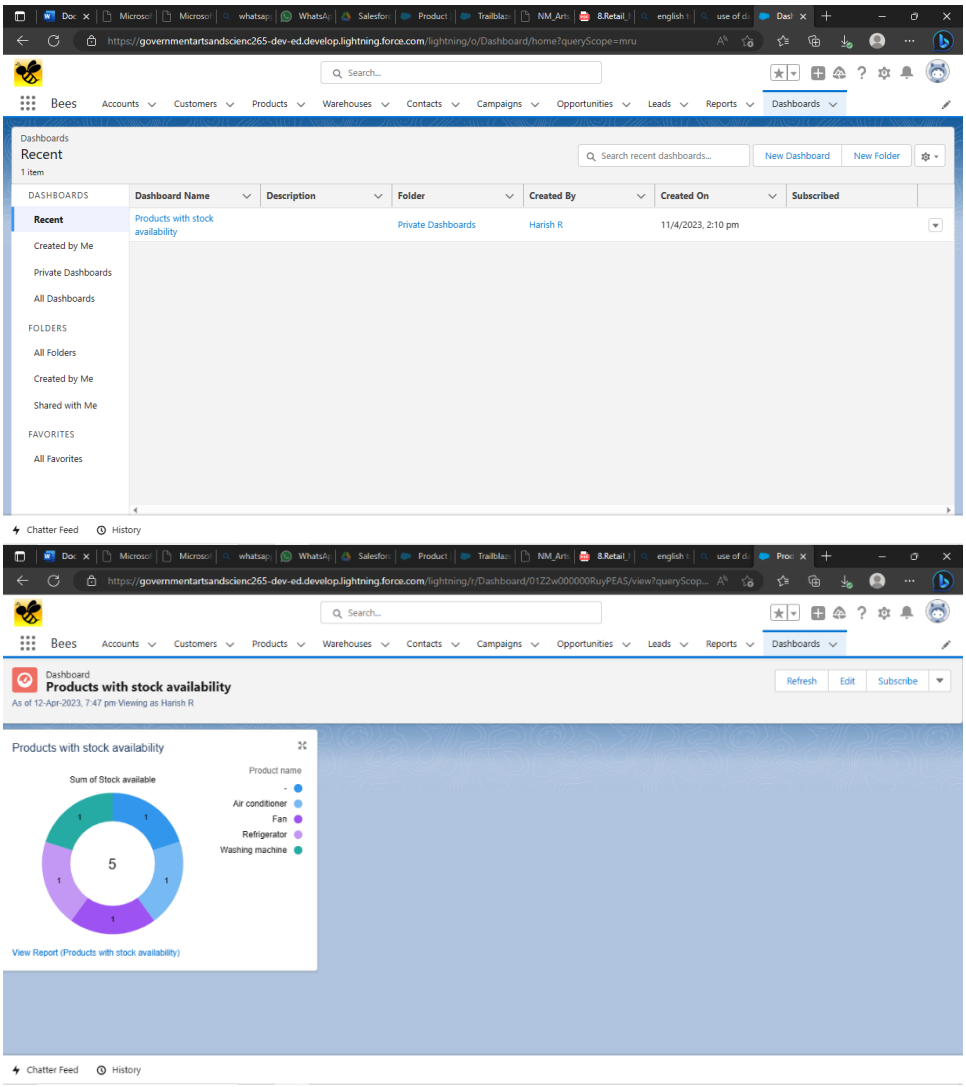
This is opportunity object. We see sales orders data







This is report page. we see the reports.



This is dashboard page.

Trailhead Profile Public URL:

HARISH.R	Team Lead	- https://trailblazer.me/id/harishknight43
KIRUTHIKA.K	Team Member 1	- https://trailblazer.me/id/kiruthi25
SUJITHA.R	Team Member 2	- https://trailblazer.me/id/sujir11
SWETHA.S	Team Member 3	– https://trailblazer.me/id/spalanisamy38

5. ADVANTAGES & DISADVANTAGE:

5.1 ADVANTAGES:

- Real-time Visibility and Reports are the Real Benefits of our Bees APP.
- Helps to Improve Business Process Automation.
- Retail Management Software helps to Manage Inventory.
- Multi-store and Omni-channel.
- Asset Tracking and Management.
- Centralized Reports and Dashboard

5.2 DISADVANTAGE :

- Lack of focus.
- Not updating.

6. APPLICATIONS:

Our Bees app helps centralize your business operations. Utilizing an RMS can streamline sales, mitigate errors, reduce costs, and ensure your business runs as smoothly as possible. But before you commit to a new platform, you need to find the best retail management solution for your business.

7. CONCLUSION:

As with every industry, retail is not immune to many changes. In order to mitigate them, the retail industry is craving a comprehensive retail management solution that offers scalability and increases customer satisfaction. Bees Retail Management Software is the best bet to solve all your retail management woes. It offers significant benefits to many advanced features that make it the best retail management solution to date in the market.

8. FUTURE SCOPE:

A retail report cited in an article on the Minneapolis Star Tribune's website predicts that over the next decade consumers will shop closer to home and make more frequent purchases rather than one weekly trip to a big department store. Retail management software is the key moving forward.

When it comes to smaller stores, it's easier for shoppers find what they need and get out quickly without having to deal with long lines and difficult parking. Granted, the downside of smaller retail stores is that they lack room for a wide breadth of products.

These smaller stores can offer convenience, speed and personalized customer service without needing to stock every item. However, since shoppers know that the odds of these retailers carrying everything they want are low, store owners and managers need to make the shopping experience convenient, easy, simple and pleasurable.