

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.

3. RESULT:

3.1 Data Model:

Object name	Fields in the Object
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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)
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:

The first screenshot shows the 'Details' page for the 'Dispatch' object in the Salesforce Setup interface. The left sidebar contains a navigation menu with options like 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', 'Object Limits', 'Record Types', 'Related Lookup Filters', 'Search Layouts', and 'List View Button Layout'. The main content area displays the 'Details' for the 'Dispatch' object, including a description, API Name, Custom, Singular Label, Plural Label, and various settings like 'Enable Reports', 'Track Activities', 'Track Field History', 'Deployment Status', 'Help Settings', and 'Standard salesforce.com Help Window'.

The second screenshot shows the 'Fields & Relationships' page for the 'Dispatch' object. The left sidebar is the same as the first screenshot. The main content area displays a table of fields and relationships, sorted by field label. The table has columns for 'FIELD LABEL', 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED'. The table lists four items: 'Created By', 'Dispatched/Tracking', 'Last Modified By', and 'Owner'.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Dispatched/Tracking	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User Group)		✓

Dispatch Field: Dispatched/Tracking

Field Information

Field Label	Dispatched/Tracking	Field Name	Name
Data Type	Text(50)		
Description			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Validation Rules

No validation rules defined.

Dispatch Field: Owner

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

No validation rules defined.

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

https://governmentartsandscienc265-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/012w0000048Ugs/Details/view

Setup Home Object Manager

SETUP > OBJECT MANAGER

Student

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

Details [Edit](#) [Delete](#)

Description

API Name	Student__c	Enable Reports	✓
Custom	✓	Track Activities	✓
Singular Label	Student	Track Field History	✓
Plural Label	Students	Deployment Status	Deployed
		Help Settings	Standard salesforce.com Help Window

https://governmentartsandscienc265-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/012w0000048Ugs/FieldsAndRelation...

Setup Home Object Manager

SETUP > OBJECT MANAGER

Student

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Related Lookup Filters
Restriction Rules
Scoping Rules

Student Custom Field
Contact
[Back to Student](#)

[Validation Rules \(0\)](#)

[Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Custom Field Definition Detail

Field Label	Contact	Object Name	Student
Field Name	Contact	Data Type	Master-Detail
API Name	Contact__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Harish B. 09/04/2023, 1:11 pm	Modified By	Harish B. 09/04/2023, 1:22 pm

Master-Detail Options

Related To	Contact	Child Relationship Name	Students
Related List Label	Students		
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	<input type="checkbox"/>		

https://governmentartsandscienc265-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/012w0000048Ugs/FieldsAndRelation...

Setup Home Object Manager

SETUP > OBJECT MANAGER

Student

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Related Lookup Filters
Restriction Rules
Scoping Rules

Student Field
Student Name
[Back to Student](#)

[Set Field-Level Security](#) [View Field Accessibility](#)

Field Information

Field Label	Student 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.

This is student object . It is created for students.

https://governmentartsandscienc265-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/012w0000048U1/Details/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Warehouse

Details

Fields & Relationships

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Buttons, Links, and Actions

Compact Layouts

Field Sets

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Related Lookup Filters

Search Layouts

List View Button Layout

Details

Description

API Name
Warehouse__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

Edit Delete

https://governmentartsandscienc265-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/012w0000048U1/FieldsAndRelation...

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Warehouse

Details

Fields & Relationships

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Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Warehouse Field Owner

Back to Warehouse

Edit Set Field-Level Security View Field Accessibility

Field Information

Field Label	Owner	Field Name	Owner
Date Type	Lookup(User Group)		
Help Text			
Description			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Validation Rules

No validation rules defined.

New Validation Rules Help

https://governmentartsandscienc265-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/012w0000048U1/FieldsAndRelation...

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Warehouse

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

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Search Layouts

List View Button Layout

Restriction Rules

Warehouse Custom Field Product name

Back to Warehouse

Validation Rules (0)

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		
API Name	Product_name__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Created By Harish B. 11/04/2023, 1:49 pm Modified By Harish B. 11/04/2023, 1:49 pm

General Options

Required ☒

Unique ☐

Case Sensitive ☐

External ID ☐

Default Value

Warehouse Custom Field

Stock available

Back to Warehouse

Validation Rules (0)

Custom Field Definition Detail

Edit | Set Field-Level Security | View Field Accessibility | Where is this used?

Field Information

Field Label	Stock available	Objr'd Name	Warehouse
Field Name	Stock_avaiabl	Data Type	Checkbox
API Name	Stock_avaiabl__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Harish B.	Modified By	Harish B.
	11/04/2023, 2:00 pm		11/04/2023, 2:00 pm

General Options

Default Value: Unchecked

Field Dependencies

No dependencies defined.

Warehouse Field

Warehouse

Back to Warehouse

Set Field-Level Security | View Field Accessibility

Field Information

Field Label	Warehouse	Field Name	Name
Data Type	Text(80)		
Description			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Validation Rules

No validation rules defined.

Warehouses

Recently Viewed

6 items • Updated a few seconds ago

Search this list...

<input type="checkbox"/>	Warehouse	
1	<input type="checkbox"/> Mumbai	
2	<input type="checkbox"/> Test case-2	
3	<input type="checkbox"/> Chennai	
4	<input type="checkbox"/> Hyderabad	
5	<input type="checkbox"/> Kolkata	
6	<input type="checkbox"/> Passport	

This is warehouse object. We capture stocks data

https://governmentartsandscienc265-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/012w0000048UVQ/Details/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Customer

Details

Fields & Relationships

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Buttons, Links, and Actions

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Related Lookup Filters

Search Layouts

List View Button Layout

Details

Description

API Name
Customer__c

Custom

Singular Label
Customer

Plural Label
Customers

Enable Reports

Track Activities

Track Field History

Deployment Status
In Development

Help Settings
Standard salesforce.com Help Window

Edit Delete

https://governmentartsandscienc265-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/012w0000048UVQ/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Customer

Details

Fields & Relationships

Page Layouts

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Search Layouts

List View Button Layout

Restriction Rules

Customer Field

Account Name

Back to Customer

Set Field-Level Security View Field Accessibility

Field Information

Field Label	Account Name	Field Name	Name
Date Type	Text(80)		
Description			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Validation Rules

No validation rules defined.

Validation Rules Help

https://governmentartsandscienc265-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/012w0000048UVQ/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Customer

Details

Fields & Relationships

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List View Button Layout

Restriction Rules

Customer Custom Field

Dispatch

Back to Customer

Validation Rules (0)

Custom Field Definition Detail

Edit Set Field-Level Security View Field Accessibility Where is this used?

Field Information

Field Label	Dispatch	Object Name	Customer
Field Name <td>Dispatch<td>Data Type<td>Checkbox</td></td></td>	Dispatch <td>Data Type<td>Checkbox</td></td>	Data Type <td>Checkbox</td>	Checkbox
API Name <td>Dispatch__c</td> <td></td> <td></td>	Dispatch__c		
Description <td></td> <td></td> <td></td>			
Help Text <td></td> <td></td> <td></td>			
Data Owner <td></td> <td></td> <td></td>			
Field Usage <td></td> <td></td> <td></td>			
Data Sensitivity Level <td></td> <td></td> <td></td>			
Compliance Categorization <td></td> <td></td> <td></td>			
Created By <td>Harish B. 09/04/2023, 8:33 pm</td> <td>Modified By<td>Harish B. 09/04/2023, 11:40 am</td></td>	Harish B. 09/04/2023, 8:33 pm	Modified By <td>Harish B. 09/04/2023, 11:40 am</td>	Harish B. 09/04/2023, 11:40 am

General Options

Default Value Unchecked

Field Dependencies

No dependencies defined.

Field Dependencies Help

Setup > OBJECT MANAGER

Customer

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

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Search Layouts

List View Button Layout

Restriction Rules

Customer Custom Field

Order

Back to Customer

Validation Rules (0)

Custom Field Definition Detail

Field Information

Field Label	Order	Object Name	Customer
Field Name	Order	Data Type	Picklist
API Name	Order__c	Global Value Set	order
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization	PII, HIPAA, GDPR, PCI, COPPA, CCPA		
Created By	Harish B.	Modified By	Harish B.
Created Date	10/04/2023, 8:19 pm	Modified Date	10/04/2023, 8:27 pm

General Options

Required ☒

Default Value

Picklist Options

Restrict picklist to the values ☒

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

Restriction Rules

Customer Custom Field

Order_date

Back to Customer

Validation Rules (0)

Custom Field Definition Detail

Field Information

Field Label	Order_date	Object Name	Customer
Field Name	Order_date	Data Type	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 B.	Modified By	Harish B.
Created Date	08/04/2023, 8:59 pm	Modified Date	08/04/2023, 8:59 pm

General Options

Required ☐

Default Value TODAY()

Validation Rules

New

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

Restriction Rules

Customer Custom Field

Warehouse

Back to Customer

Validation Rules (0)

Custom Field Definition Detail

Field Information

Field Label	Warehouse	Object Name	Customer
Field Name	Warehouse	Data Type	Master-Detail
API Name	Warehouse__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Harish B.	Modified By	Harish B.
Created Date	10/04/2023, 8:13 pm	Modified Date	10/04/2023, 8:13 pm

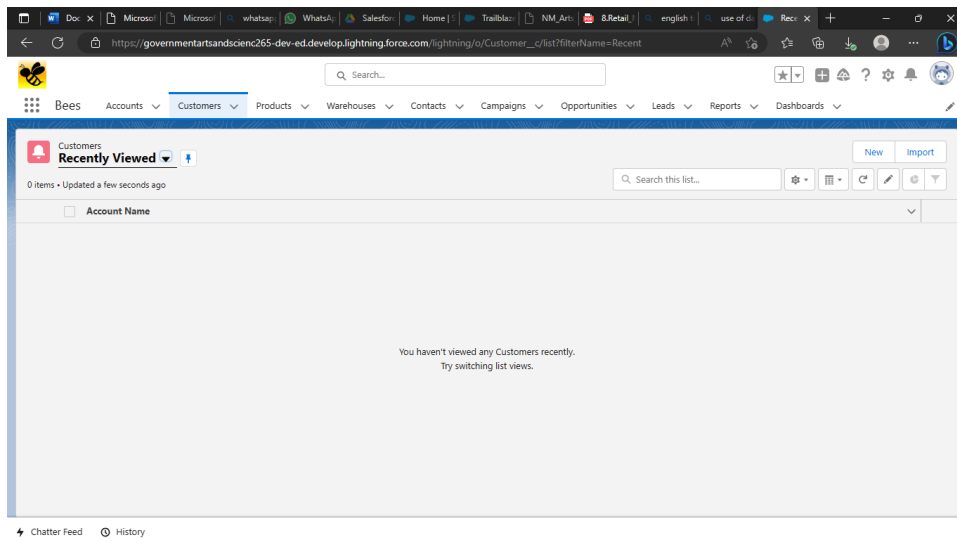
Master-Detail Options

Related To Warehouse

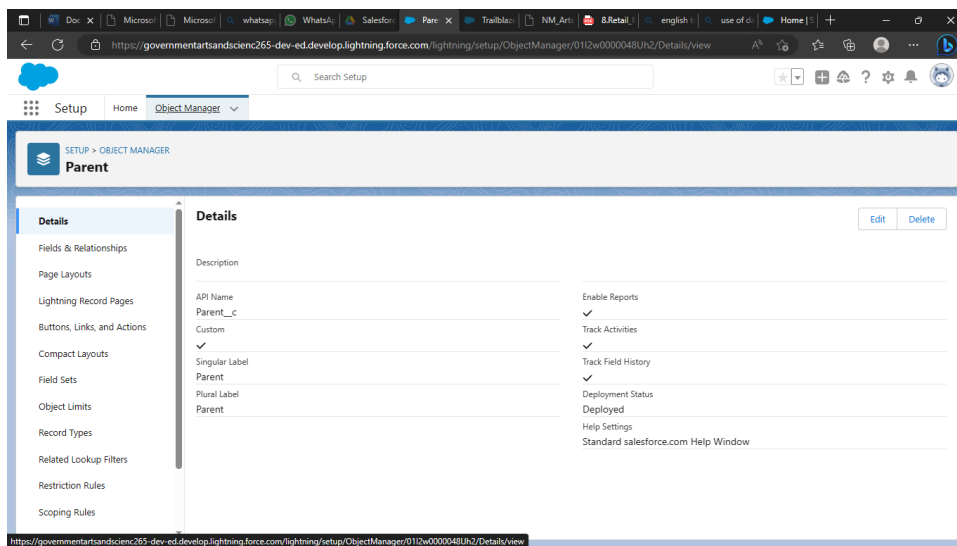
Child Relationship Name Customers

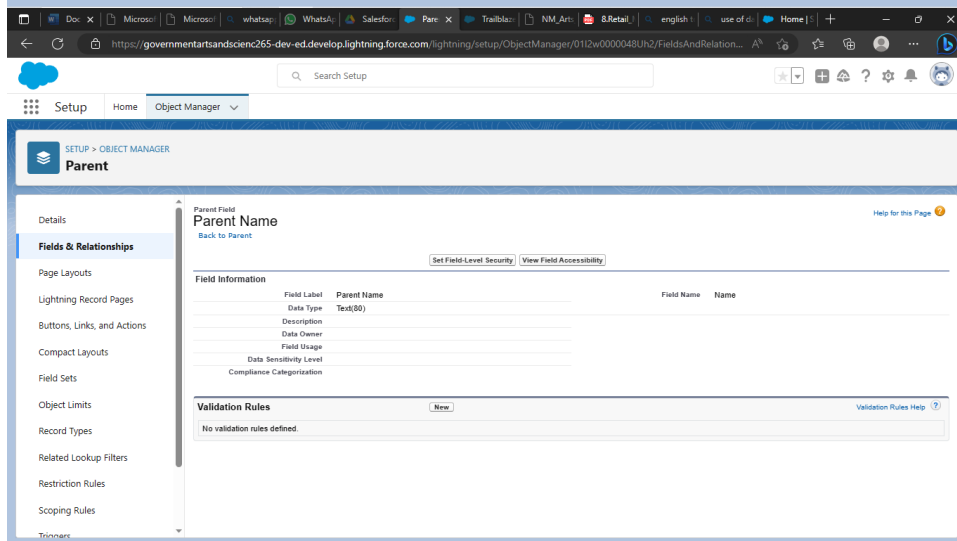
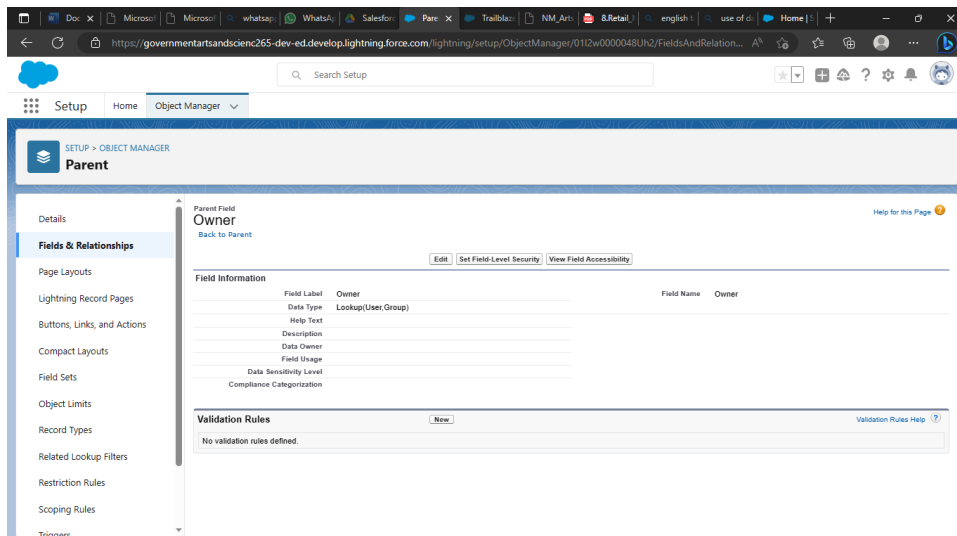
Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.

Shareable Master Detail ☐



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





This is a parent object .

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

Details

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

Edit Delete

Setup > OBJECT MANAGER

Product

Details

Fields & Relationships

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Buttons, Links, and Actions

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Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Product Custom Field
Contract Line Item

Back to Product

Validation Rules (0)

Custom Field Definition Detail

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 B. 11/04/2023, 6:09 am

Modified By
Harish B. 11/04/2023, 6:09 am

Object Name
Product

Data Type
Master-Detail

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

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

Product Field
Products Name

Back to Product

Set Field-Level Security View Field Accessibility

Field Information

Field Label
Products Name

Data Type
Text(80)

Description

Data Owner

Field Usage

Data Sensitivity Level

Compliance Categorization

Field Name
Name

Validation Rules

New

No validation rules defined.

Validation Rules Help

Product Custom Field

products_in_warehouse

Back to Product

Custom Field Definition Detail

Field Information

Field Label	products_in_warehouse	Object Name	Product
Field Name	products_in_warehouse		
API Name	products_in_warehouse__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Harish B.	Modified By	Harish B.
	09/04/2023, 3:56 pm		09/04/2023, 3:56 pm

Formula Options

Data Type	Formula
-----------	---------

Warehouse__Name

Product Custom Field

Warehouse

Back to Product

Validation Rules (0)

Custom Field Definition Detail

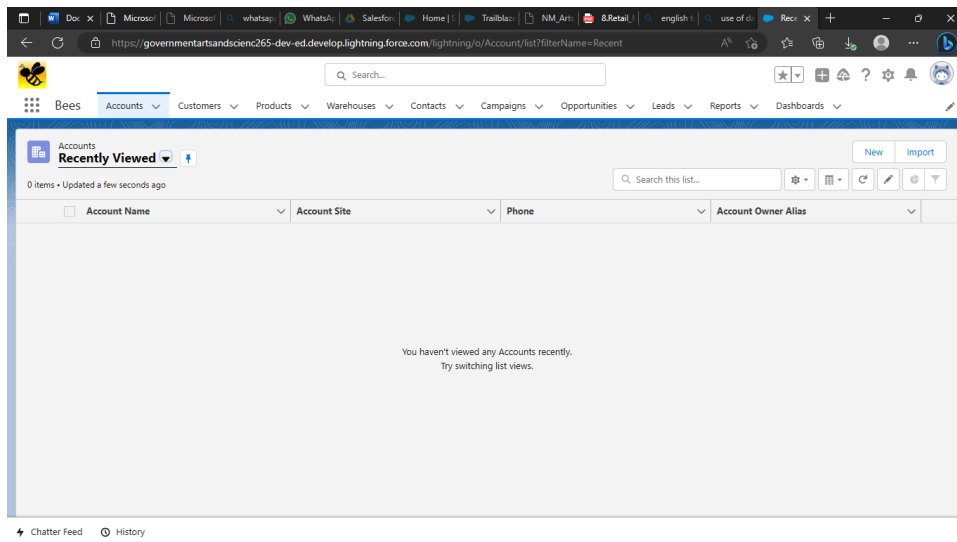
Field Information

Field Label	Warehouse	Object Name	Product
Field Name	Warehouse	Data Type	Master-Detail
API Name	Warehouse__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Harish B.	Modified By	Harish B.
	09/04/2023, 3:51 pm		09/04/2023, 3:51 pm

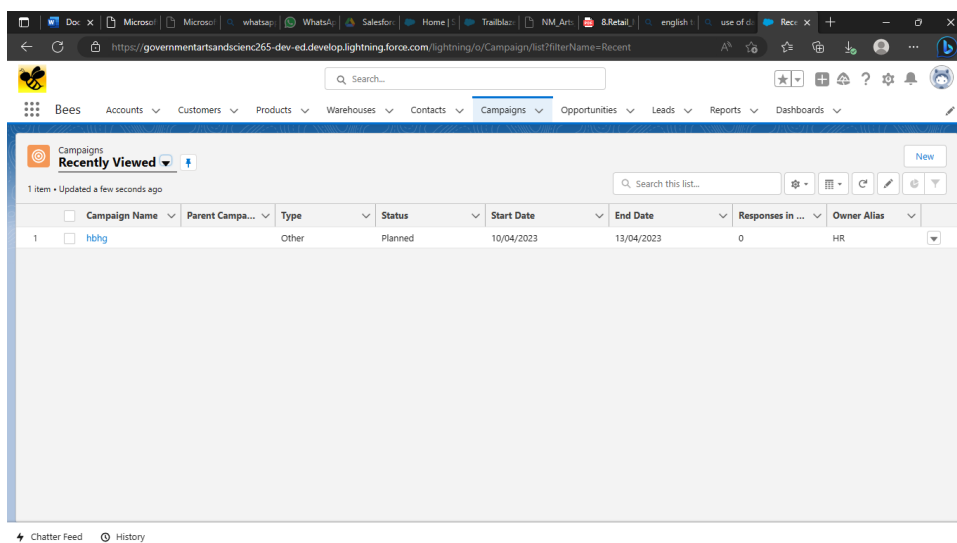
Master-Detail Options

Related To	Warehouse	Child Relationship Name	Products
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	<input type="checkbox"/>		

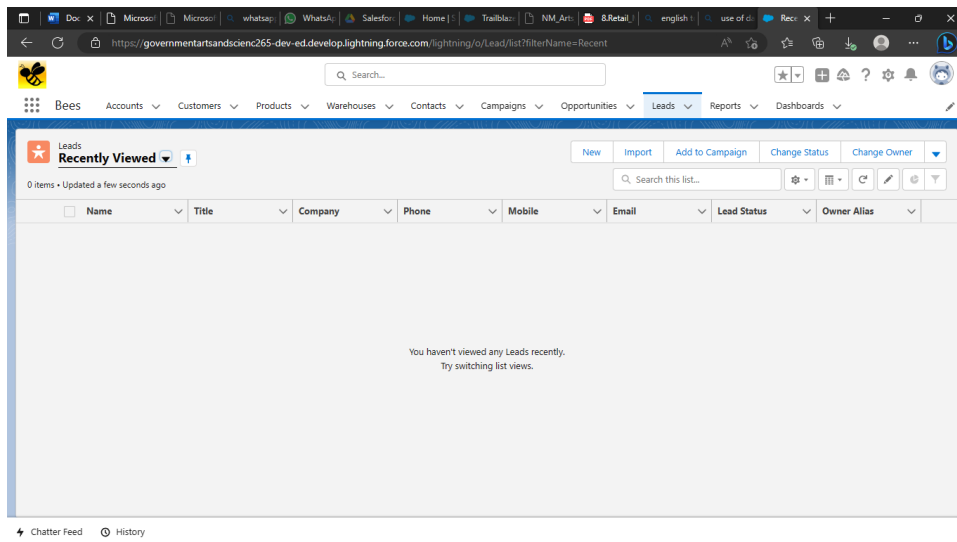
This is product object. Here we store product details i.e electronic types



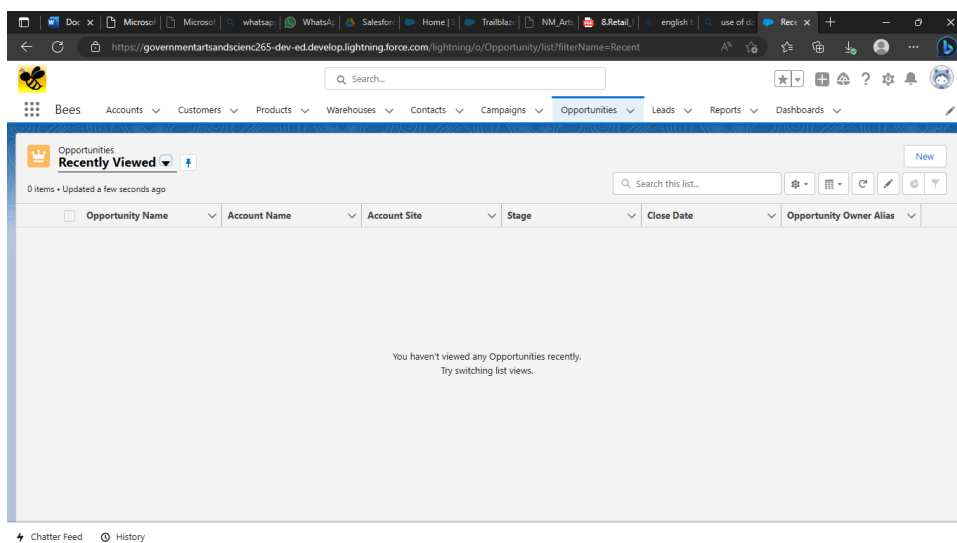
This is account object. We capture customers data.



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

Bees Accounts Customers Products Warehouses Contacts Campaigns Opportunities Leads Reports Dashboards

Reports

Recent

1 item

Search recent reports...

New Report New Folder

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Products with stock availability		Private Reports	Harish R	11/4/2023, 2:07 pm	

Created by Me

Private Reports

Public Reports

All Reports

FOLDERS

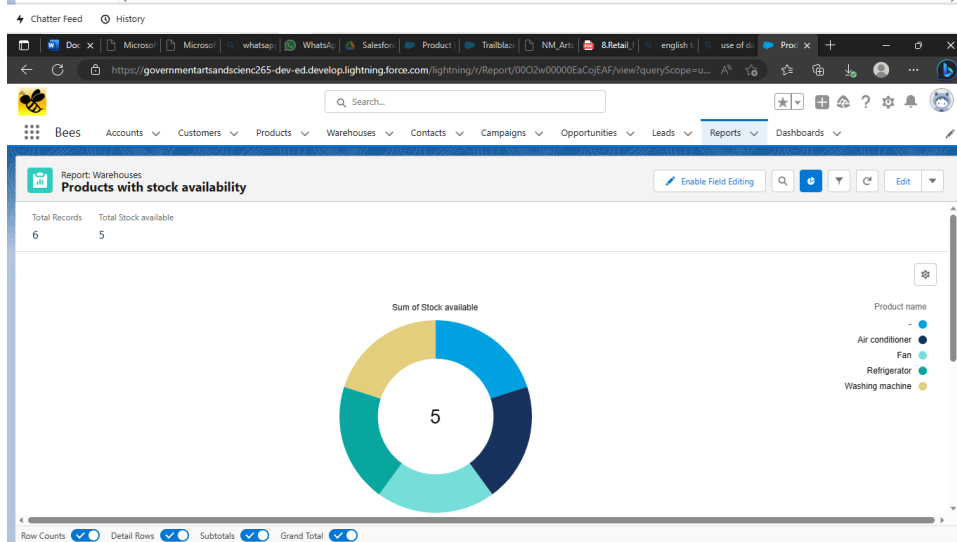
All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites



Report: Warehouses

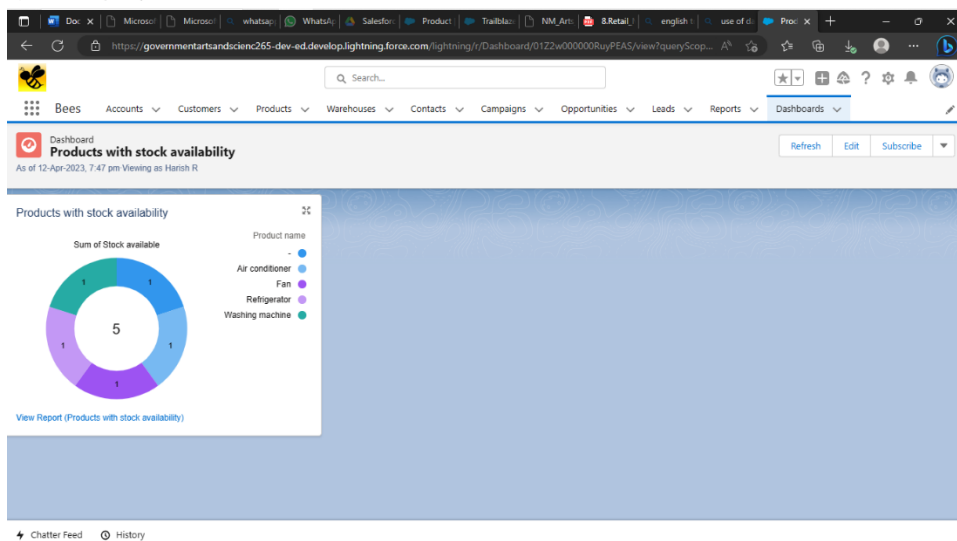
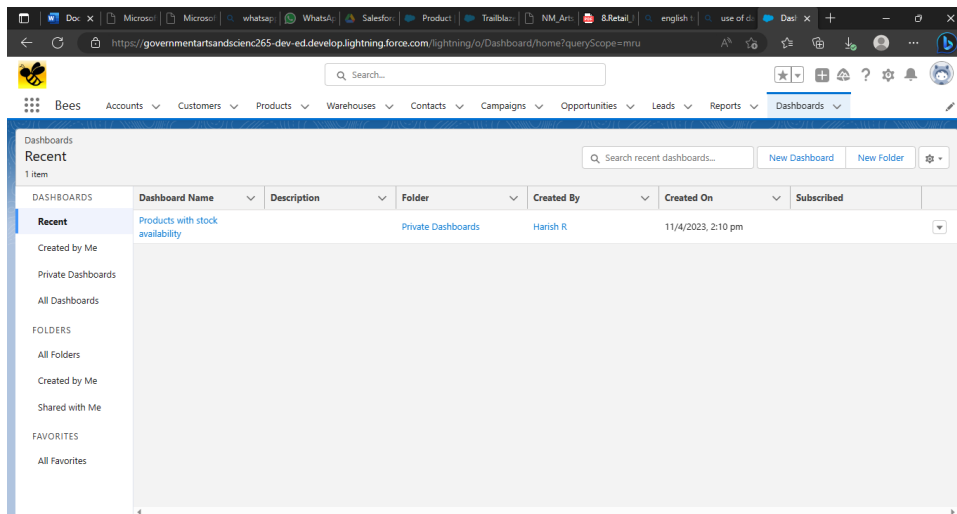
Products with stock availability

Enable Field Editing

Product name	Warehouse: Warehouse	Stock available
- (2)	Passbook	<input type="checkbox"/>
	Test case-2	<input checked="" type="checkbox"/>
Subtotal		1
Air conditioner (1)	Hyderabad	<input checked="" type="checkbox"/>
Subtotal		1
Fan (1)	Kolkata	<input checked="" type="checkbox"/>
Subtotal		1
Refrigerator (1)	Chennai	<input checked="" type="checkbox"/>
Subtotal		1
Washing machine (1)	Mumbai	<input checked="" type="checkbox"/>
Subtotal		1
Total (6)		5

Row Counts: ☒ Detail Rows: ☒ Subtotals: ☒ Grand Total: ☒

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.