RETAIL MANAGEMENT APPLICATION USING SALESFORCE

1. INTRODUCTION :

1.1 OVERVIEW

Retail management is a critical aspect of any business that deals with selling goods or services to customers. Managing retail operations can be a daunting task, especially if you have a large customer base or if you have multiple location. Salesforce is a powerful customer relationship management (CRM) platform that can help you manage your retail operations effectively. With its robust set of features and functionality, you can use Salesforce to manage your customer data, track sales, manage inventory, and improve customer service.

1.2 PURPOSE

The purpose of a retail management application using Salesforce is to help retail businesses manage their operations more efficiently and effectively. Salesforce is a cloud-based customer relationship management (CRM) platform that offers a wide range of features and capabilities that can be leveraged by retailers to streamline their sales, marketing, and customer service processes.

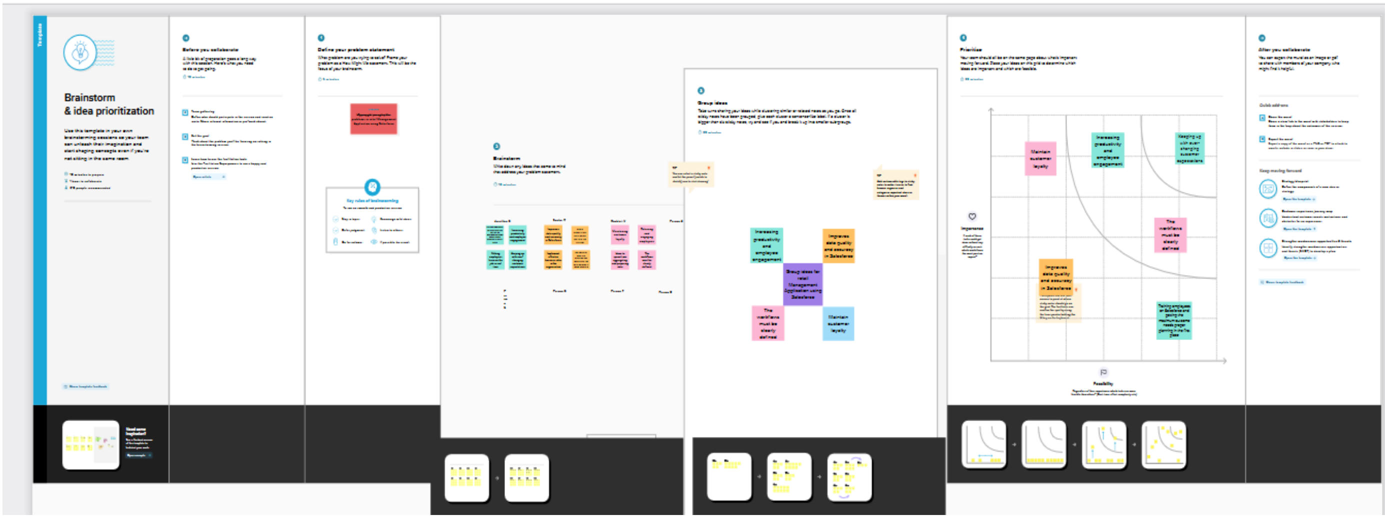
Overall, a retail management application using Salesforce can help retailers improve their operational efficiency, increase sales, and enhance the customer experience.

2. *PROBLEM DEFINITION AND DESIGN THINKING*

2.1 EMPATHY MAP


Template
Empathy map
Use this framework to develop a deep, shared understanding and empathy for other people. An empathy map helps describe the aspects of a user's experience, needs and pain points, to quickly understand your users' experience and mindset.
Build empathy
The information you add here should be representative of the observations and research you've done about your users.
Says
Thinks
Does
Feels
Need some inspiration?

2.2 IDEATION AND BRAINSTORMING MAP



3. *RESULT*

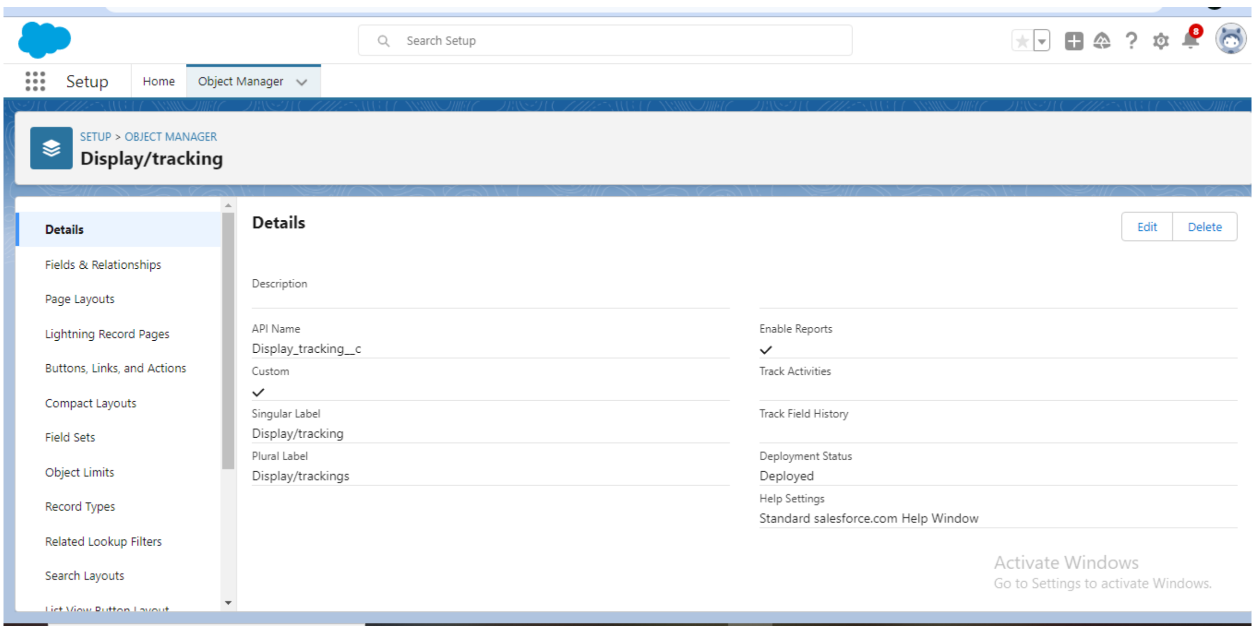
3.1 DATA MODEL:

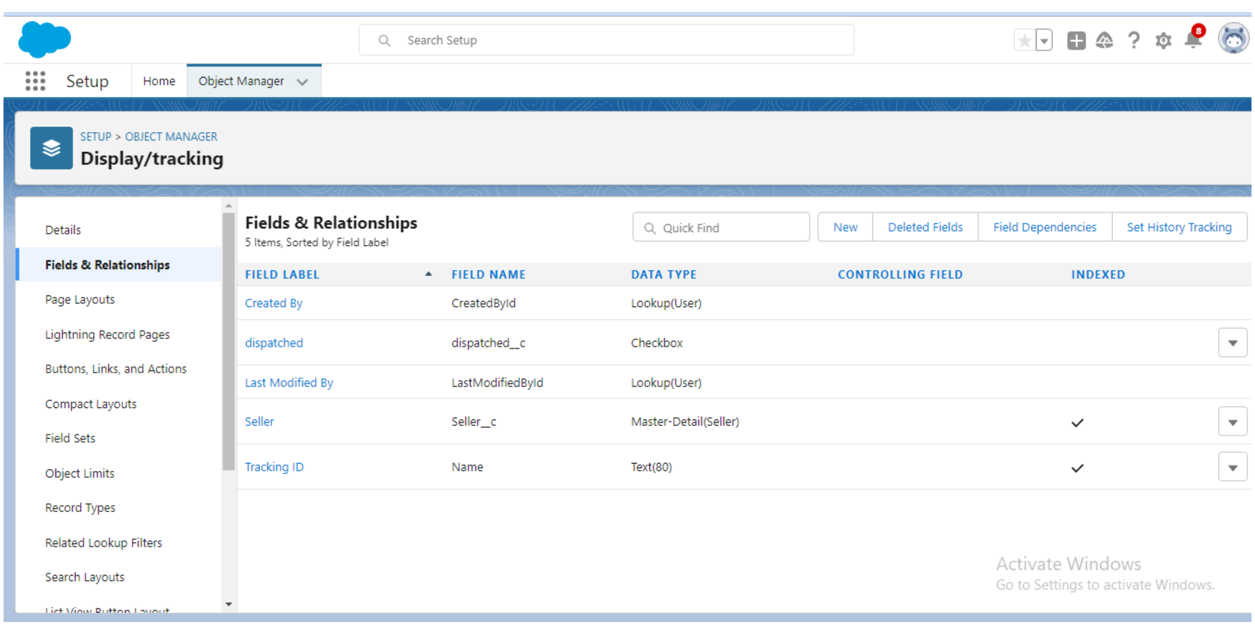
OBJECT	FIELD OF THE OBJECT	
	FIELD LABEL	DATA TYPE
Dispatch/Tracking	Created by	Lookup (User)
	Dispatched	Checkbox
	Last modified by	Lookup(User)
	Seller	Master-detail(seller)
	Tracking ID	Text(80)
Customer	Customer status type	Picklist
	Name	Text(225)
	Party	Lookup(individual)
	Total life time value	Number(9.0)
Account	Account Name	Name
	Account Number	Text(40)
	Account Owner	Lookup(User)
	Account site	Text(80)

	Account Source	Picklist
Contact	Account Name	Lookup(Account)
	Account Website	Formula(Text)
	Contact Owner	Lookup(User)
	Created by	Lookup(user)

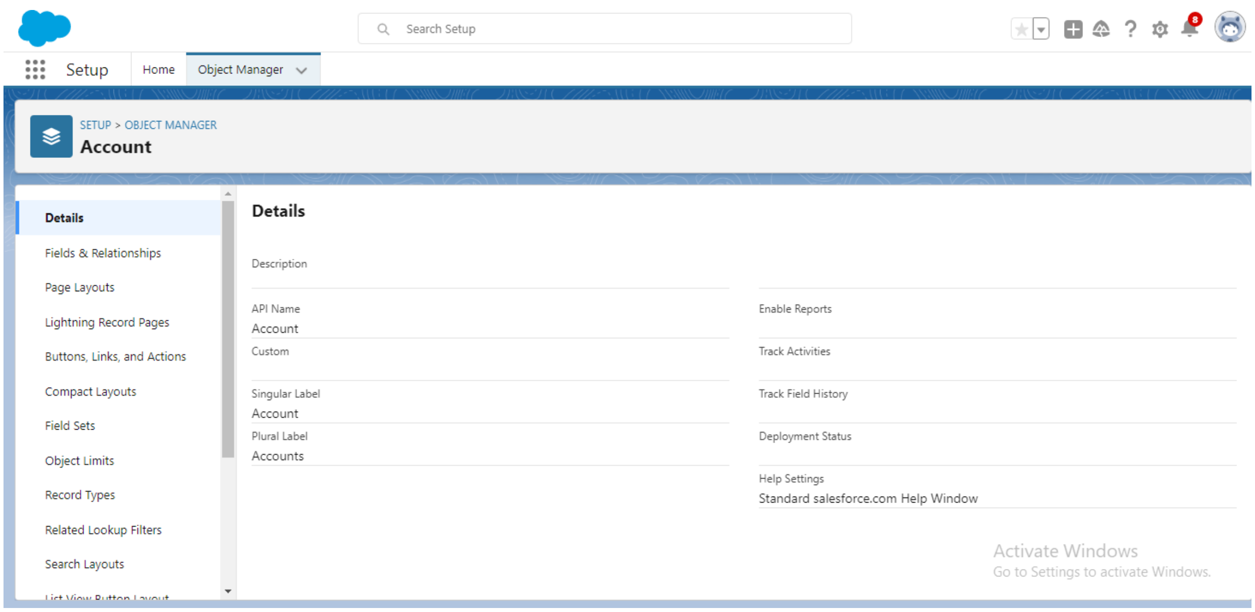
<u>ACTIVITY AND SCREENSHOT</u>:

DISPATCH/TRACKING:

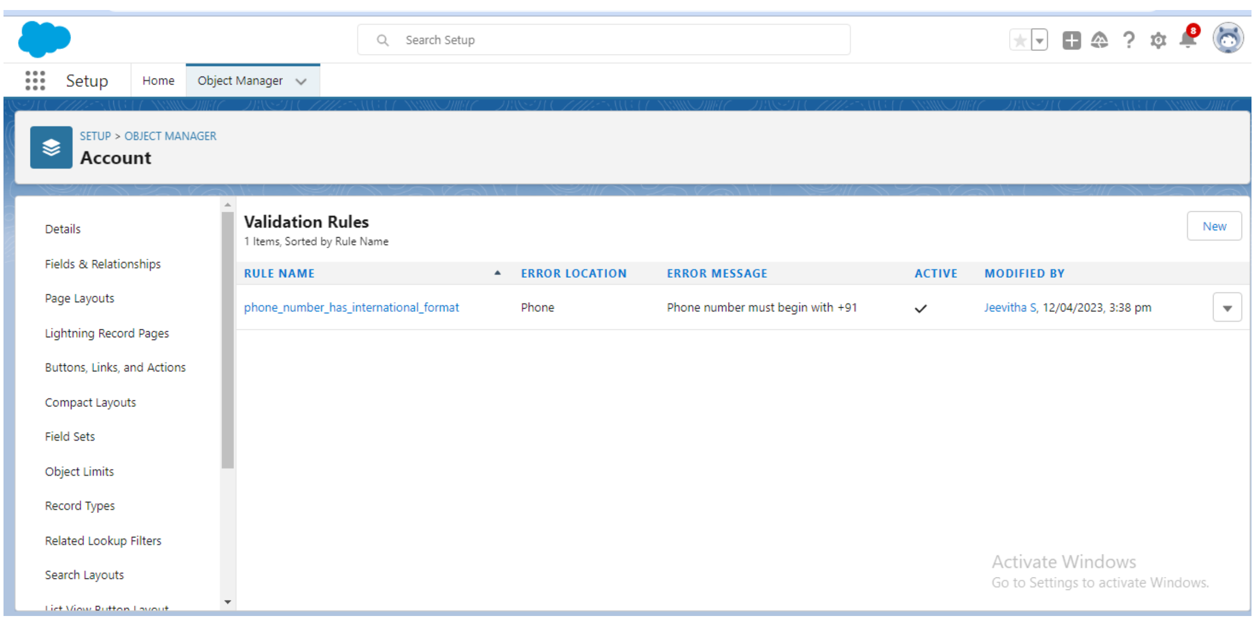




ACCOUNT:



Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Account
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
Details
Description
API Name
Account
Custom
Singular Label
Account
Plural Label
Accounts
Enable Reports
Track Activities
Track Field History
Deployment Status
Help Settings
Standard salesforce.com Help Window
Activate Windows
Go to Settings to activate Windows.



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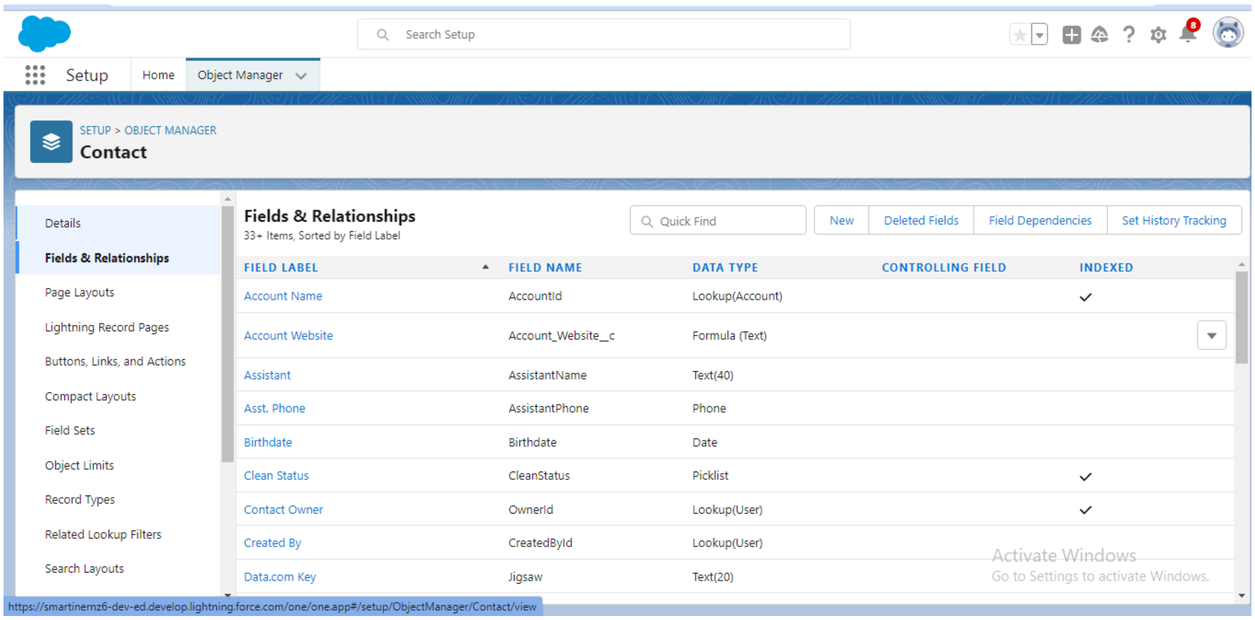
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
Validation Rules
1 Items, Sorted by Rule Name
New
RULE NAME
ERROR LOCATION
ERROR MESSAGE
ACTIVE
MODIFIED BY
phone_number_has_international_format
Phone
Phone number must begin with +91
Jeevitha S, 12/04/2023, 3:38 pm
Activate Windows
Go to Settings to activate Windows.

CONTACT: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Object Manager
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
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)
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Go to Settings to activate Windows.
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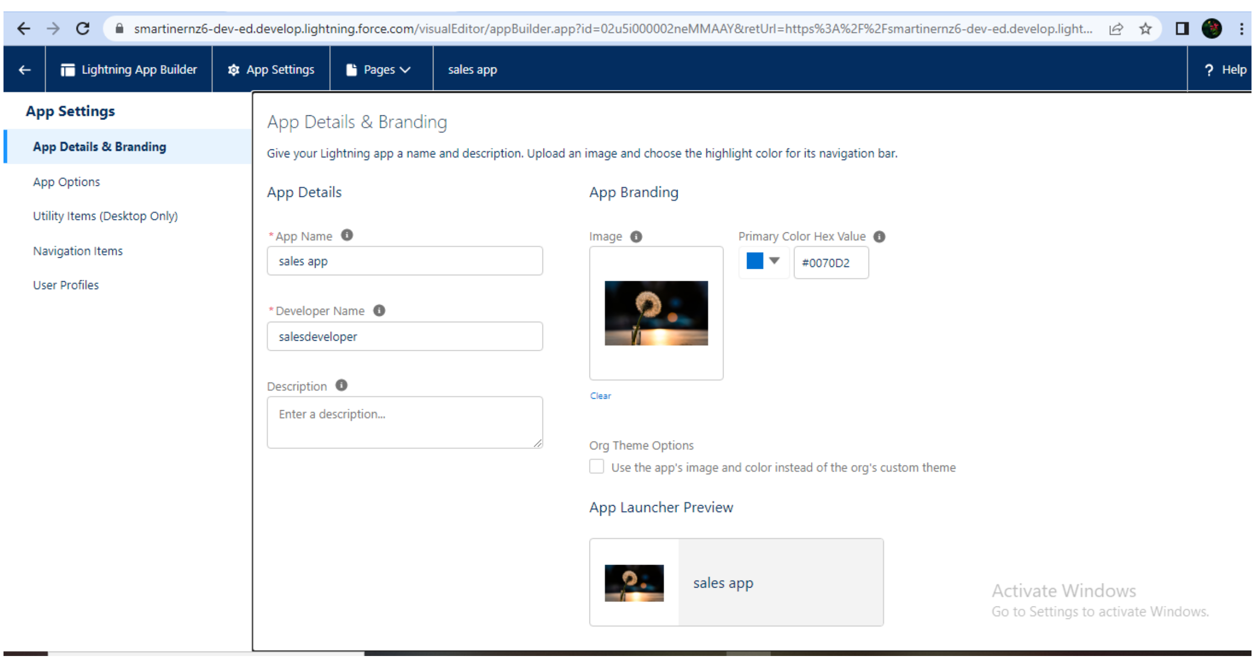
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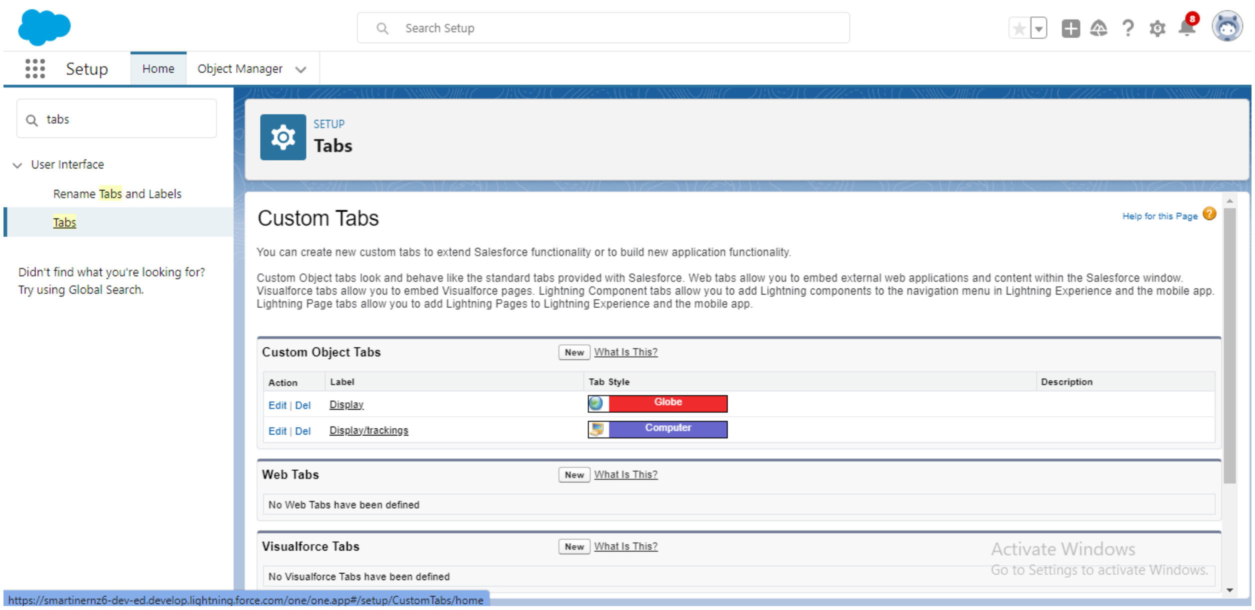
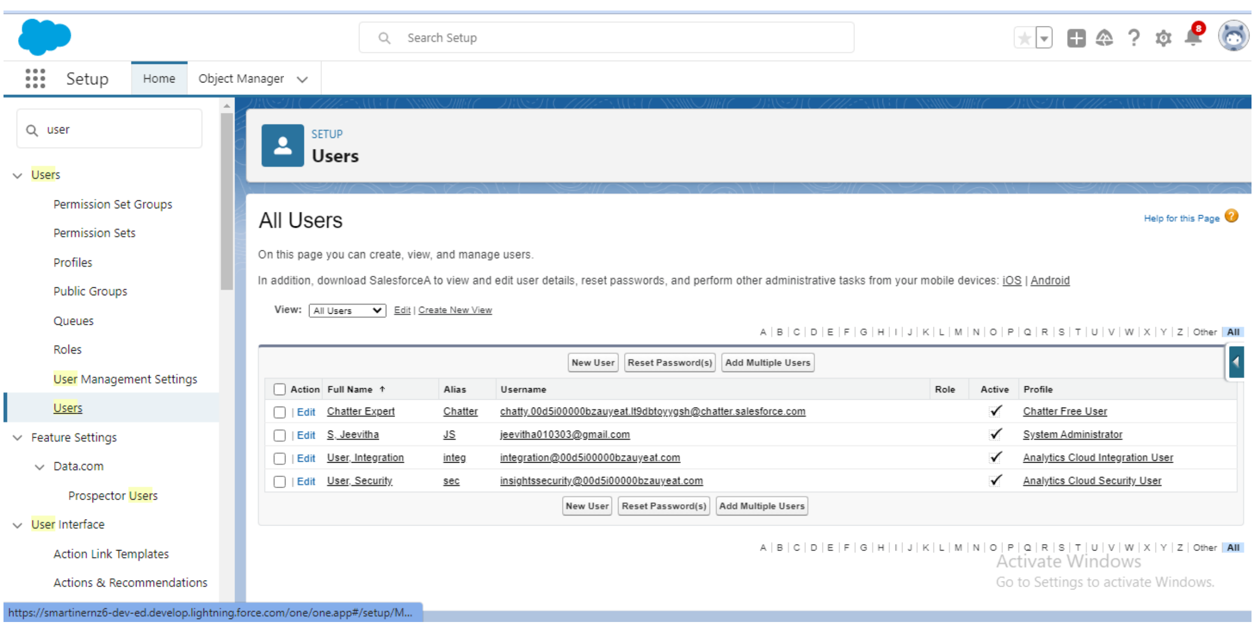
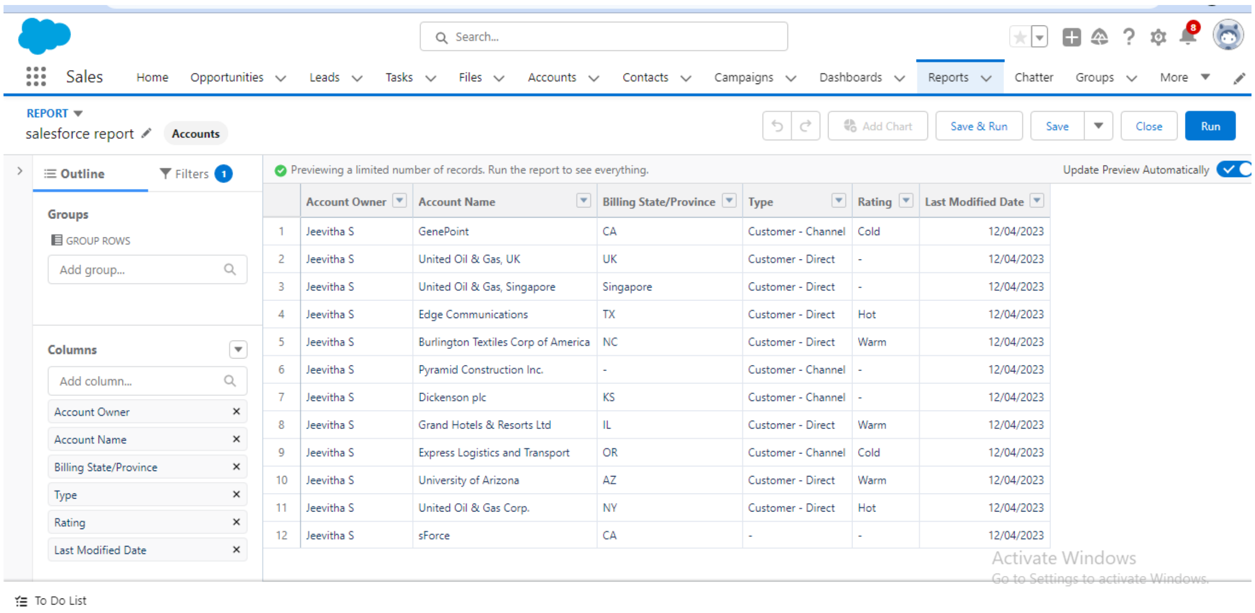
Lightning App Builder
App Settings
Pages
sales app
Help
App Settings
App Details & Branding
App Options
Utility Items (Desktop Only)
Navigation Items
User Profiles
App Details & Branding
Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.
App Details
App Branding
* App Name
sales app
Image
Primary Color Hex Value
#0070D2
* Developer Name
salesdeveloper
Clear
Description
Enter a description...
Org Theme Options
Use the app's image and color instead of the org's custom theme
App Launcher Preview
sales app
Activate Windows
Go to Settings to activate Windows.

CUSTOM TAB:


Search Setup
Setup
Home
Object Manager
tabs
User Interface
Rename Tabs and Labels
Tabs
Didn't find what you're looking for?
Try using Global Search.
SETUP
Tabs
Custom Tabs
Help for this Page
You can create new custom tabs to extend Salesforce functionality or to build new application functionality.
Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.
Custom Object Tabs
New
What Is This?
Action
Label
Tab Style
Description
Edit | Del
Display
Globe
Edit | Del
Display/trackings
Computer
Web Tabs
No Web Tabs have been defined
Visualforce Tabs
No Visualforce Tabs have been defined
Activate Windows
Go to Settings to activate Windows.
https://smartinernz6-dev-ed.develop.lightning.force.com/one/one.app#/setup/CustomTabs/home


Search Setup
Setup
Home
Object Manager
user
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
User Interface
Action Link Templates
Actions & Recommendations
SETUP
Users
All Users
Help for this Page
On this page you can create, view, and manage users.
In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: iOS | Android
View: All Users
Edit | Create New View
New User
Reset Password(s)
Add Multiple Users
Action
Full Name
Alias
Username
Role
Active
Profile
Edit
Chatter Expert
Chatter
chatty.00d5i00000bzauyeat.lt9dbtoyygsh@chatter.salesforce.com
Chatter Free User
Edit
S, Jeevitha
JS
jeevitha010303@gmail.com
System Administrator
Edit
User, Integration
integ
integration@00d5i00000bzauyeat.com
Analytics Cloud Integration User
Edit
User, Security
sec
insightssecurity@00d5i00000bzauyeat.com
Analytics Cloud Security User
Activate Windows
Go to Settings to activate Windows.
https://smartinernz6-dev-ed.develop.lightning.force.com/one/one.app#/setup/M...

REPORT:



	Account Owner	Account Name	Billing State/Province	Type	Rating	Last Modified Date
1	Jeevitha S	GenePoint	CA	Customer - Channel	Cold	12/04/2023
2	Jeevitha S	United Oil & Gas, UK	UK	Customer - Direct	-	12/04/2023
3	Jeevitha S	United Oil & Gas, Singapore	Singapore	Customer - Direct	-	12/04/2023
4	Jeevitha S	Edge Communications	TX	Customer - Direct	Hot	12/04/2023
5	Jeevitha S	Burlington Textiles Corp of America	NC	Customer - Direct	Warm	12/04/2023
6	Jeevitha S	Pyramid Construction Inc.	-	Customer - Channel	-	12/04/2023
7	Jeevitha S	Dickenson plc	KS	Customer - Channel	-	12/04/2023
8	Jeevitha S	Grand Hotels & Resorts Ltd	IL	Customer - Direct	Warm	12/04/2023
9	Jeevitha S	Express Logistics and Transport	OR	Customer - Channel	Cold	12/04/2023
10	Jeevitha S	University of Arizona	AZ	Customer - Direct	Warm	12/04/2023
11	Jeevitha S	United Oil & Gas Corp.	NY	Customer - Direct	Hot	12/04/2023
12	Jeevitha S	sForce	CA	-	-	12/04/2023

4. *TRAILHEAD PROFILE PUBLIC URL*

Team lead - https://trailblazer.me/id/jeevitha010303

Team Member 1 - https://trailblazer.me/id/snekarajendiran0906

Team Member 2 - https://trailblazer.me/id/roshini007

5. *ADVANTAGES AND DISADVANTAGES*

✓ ADVANTAGES

- Customer Relationship Management: Salesforce provides a centralized platform to manage all customer data, including purchase history, preferences, and interactions.

- ➢ Inventory Management: Salesforce can be used to track inventory levels in real-time, enabling retailers to optimize their stock levels, reduce waste, and ensure that popular items are always in stock.

- ➢ Order Management: Salesforce can be used to manage the entire order process, from order placement to delivery. This allows retailers to streamline their operations, improve order accuracy, and reduce order processing times.

- ➢ Mobile Access: This enables retailers to manage their operations from anywhere, at any time, and respond quickly to changing business needs.

✓ DISADVANTAGES

- ➢ Complexity: Salesforce can be complex, and configuring it to meet your specific retail management needs may require extensive customization. This can be time-consuming and costly.

- ➢ Cost: Salesforce can be expensive, particularly if you need to customize it extensively or add multiple features. Small retail businesses may not be able to afford the investment

- ➢ Learning Curve: Users who are new to Salesforce may require training to use it effectively, which can take time and resources.

- ➢ Limited Customization: While Salesforce does offer some customization options, it may not be possible to customize it to meet all of your unique retail management needs.

6. *APPLICATION:*

- Customer Relationship Management: Salesforce can help retailers to manage customer relationships more effectively, by tracking customer interactions across all channels and touchpoints. This can help retailers to identify customer needs, preferences, and behavior patterns, and to provide more personalized and targeted customer experiences.

- Marketing Automation: Salesforce can be used to automate marketing campaigns, including email marketing, social media marketing, and digital advertising. This can help retailers to reach customers more effectively, and to drive higher levels of engagement and conversion.

- Data Analytics: Salesforce can provide retailers with powerful data analytics capabilities, allowing them to analyze customer behavior, sales trends, and other key metrics. This can help retailers to identify opportunities for growth and optimization, and to make data-driven decisions.

7. *CONCLUSION:*

Salesforce offers a wide range of tools and functionalities that can help retailers manage their operations effectively. These include customer relationship management (CRM), inventory management, marketing automation, and analytics, among others.One of the main benefits of using Salesforce is its scalability and flexibility. The platform can be customized to meet the specific needs of a retail business, from a small boutique to a large chain of stores. Additionally, Salesforce's cloud-based architecture enables retailers to access their data and applications from anywhere, at any time, using any device.

8. ***<u>FUTURE SCOPE:</u>***

Here are some potential future scopes for retail management applications using Salesforce:

- Integration with AI and Machine Learning: Salesforce's Einstein AI platform can help retailers predict customer behavior, optimize pricing, and personalize marketing campaigns. Integrating AI and machine learning into retail management applications can help retailers make better decisions based on data analysis.

- Enhancing Customer Experience: Retailers can use Salesforce's customer relationship management (CRM) tools to personalize their customer interactions, provide targeted marketing campaigns, and optimize their customer journeys. Future retail management applications can use this technology to enhance the customer experience and increase customer loyalty.

- Mobile-First Approach: With the rise of mobile devices, retailers need to develop applications that are optimized for mobile devices. Future retail management applications can use Salesforce's mobile application development tools to develop mobile-first applications that provide a seamless user experience across all devices.