

RETAIL MANAGEMENT USING SALESFORCE

1 INTRODUCTION

1.1 Overview

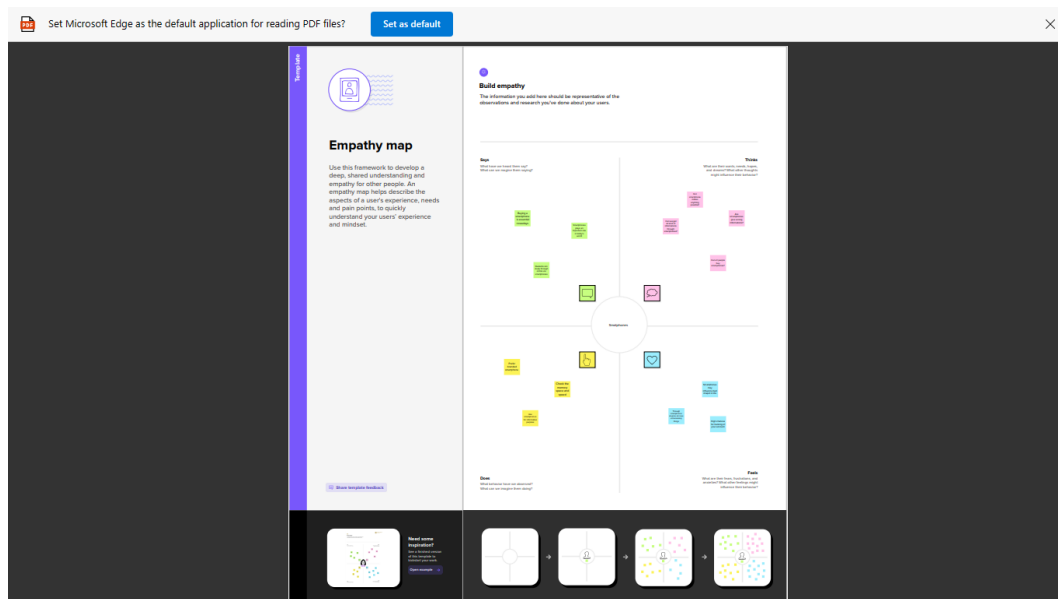
Retailing encompasses the business activities involved selling goods and services to customers for their personal, family, or household etc.

1.1 Purpose

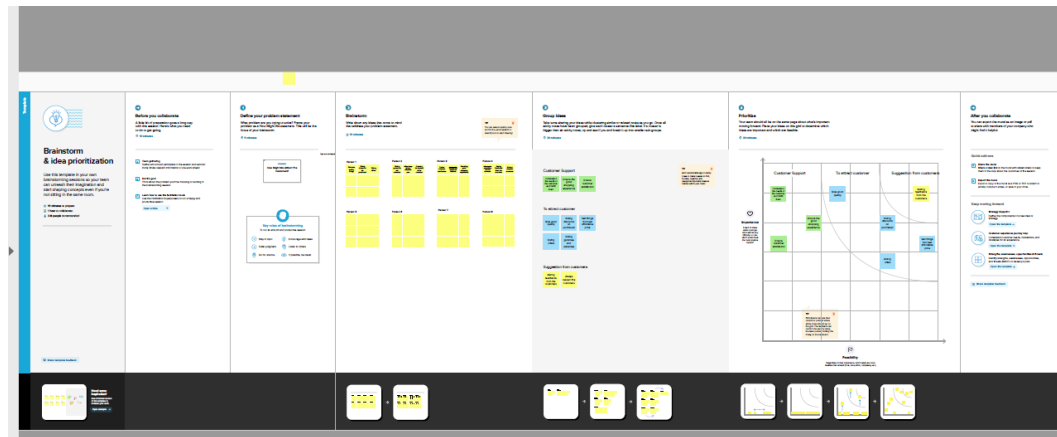
Retail management optimizes internal processes such as inventory management, offline and online storefronts, warehouse operations, payment and accounting, and human resources.

2 Problem Definition & Design Thinking

2.1 Empathy Map



2.2 Ideation & Brainstorming Map



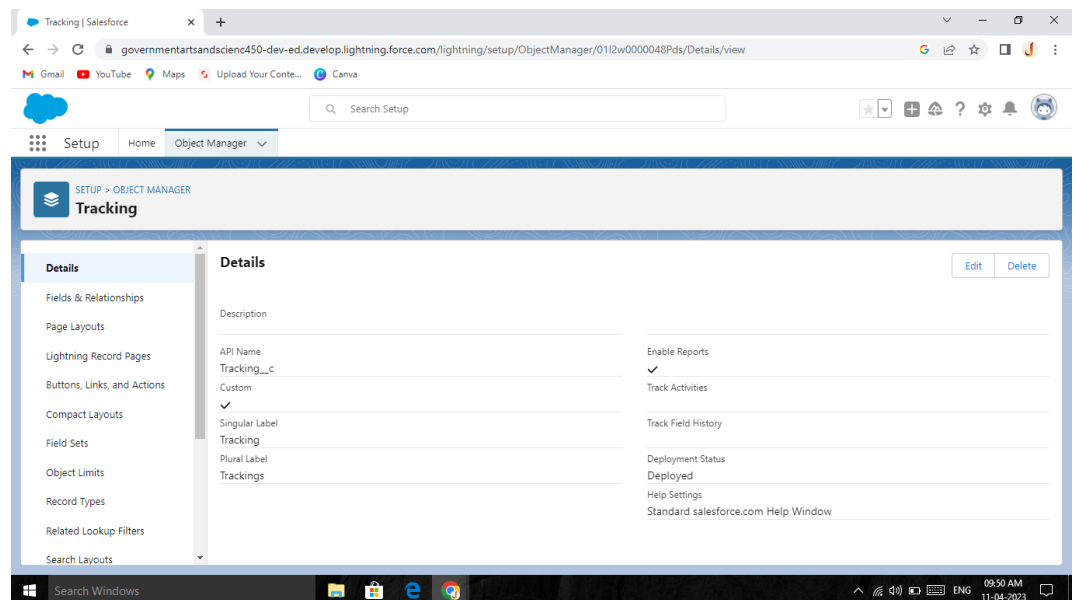
3 RESULT

3.1 Data Model:

Object name	Fields in the Object	
obj1	Field label	Data type
	Tracking/Dispatch	checkbox
obj2	Field label	Data type
	Nil	Nil

3.2 Activity & Screenshot

1.Creation of object - Tracking



Objects are database tables that permits you to store data that is specific to an organisation.

2. Creation of fields on Tracking

The screenshot displays the Salesforce Object Manager interface for a custom field named 'Tracking'. The left sidebar shows the navigation menu with 'Fields & Relationships' selected. The main content area is titled 'Tracking Custom Field' and includes a 'Back to Tracking' link. Below this, there are tabs for 'Custom Field Definition Detail', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Custom Field Definition Detail' tab is active, showing a table of field information. The table includes fields such as Field Label, Field Name, API Name, Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, Compliance Categorization, Created By, and Modified By. The 'Field Information' section shows the following details:

Field Information	Object Name
Field Label: Tracking	Tracking
Field Name: Tracking	Data Type: Checkbox
API Name: Tracking__c	
Description:	
Help Text:	
Data Owner:	
Field Usage:	
Data Sensitivity Level:	
Compliance Categorization:	
Created By: JERAFIN.J. 06/04/2023, 3:49 pm	Modified By: JERAFIN.J. 06/04/2023, 3:49 pm

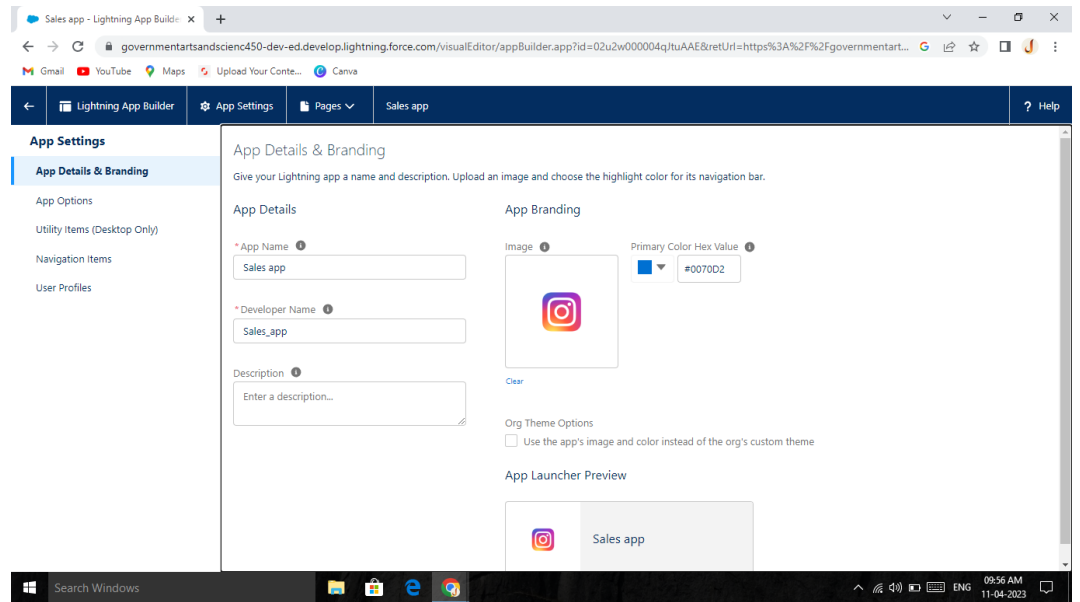
Below the table, the 'General Options' section shows the 'Default Value' as 'Unchecked'.

3. Creation of relationship between objects

This screenshot is identical to the one above, showing the Salesforce Object Manager interface for the 'Tracking' custom field. It displays the 'Custom Field Definition Detail' tab with the same field information table and 'General Options' section.

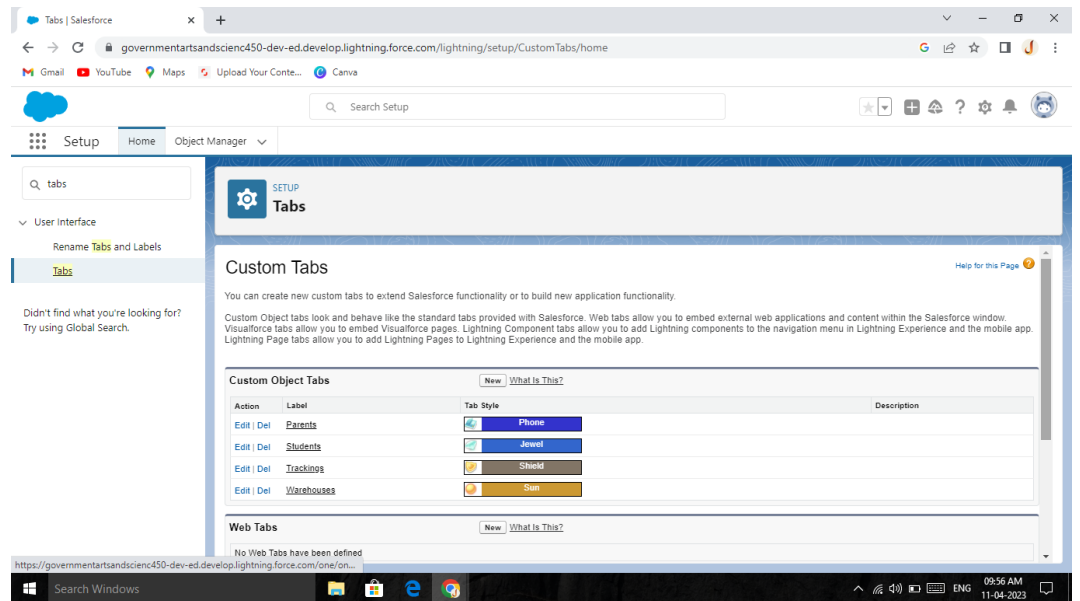
Object relationships are special field types that connect two objects.

4. Creation of application



Apps in salesforce are a group of tabs that help the application by working together as a unit. It has a name, a logo, and a particular. An app is a collection of items that work together to serve a particular function.

5. Creation of custom tabs



6. Creation of User

The screenshot shows the Salesforce 'Users' management page. The page title is 'Users' and it includes a search bar and navigation links. The main content area displays a table of users with columns: Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists several users, including 'Chatter Export', 'J. JERAFIN', 'J. JERAFIN', 'User Integration', and 'User Security'. The left sidebar shows the 'Setup' menu with options like 'Users', 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', and 'User Management Settings'. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'.

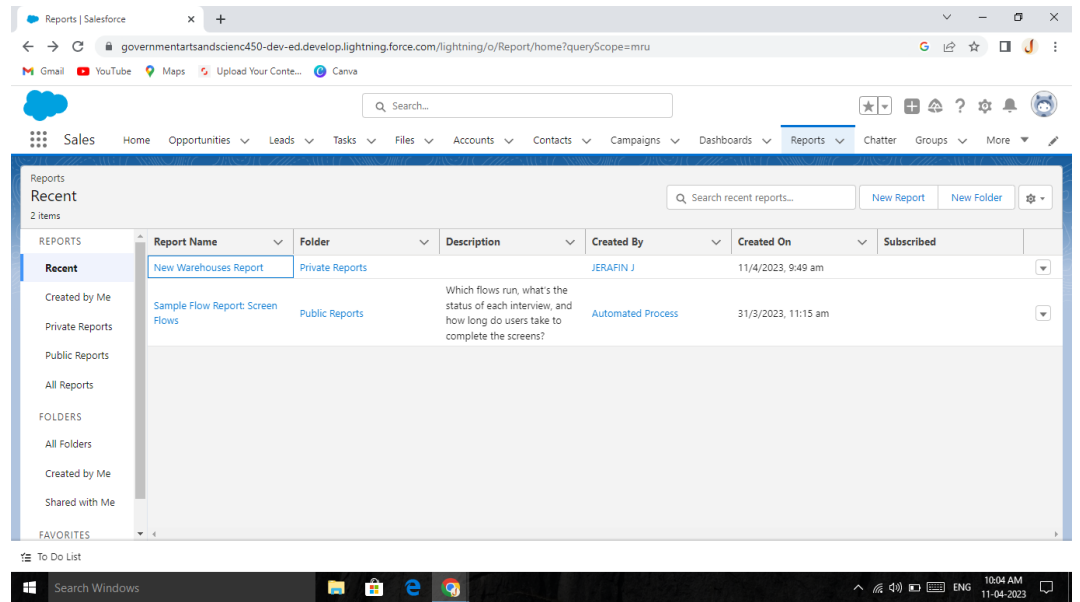
A user is anyone who logs in to salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records.

7. Creation of Validation rules

The screenshot shows the Salesforce 'Account Validation Rule' creation page. The page title is 'Account Validation Rule' and it includes a search bar and navigation links. The main content area displays a form for creating a validation rule. The form has fields for 'Rule Name', 'Active', and 'Error Condition Formula'. The 'Rule Name' is 'Phone_number_has_international_format'. The 'Active' checkbox is checked. The 'Error Condition Formula' field contains the formula 'LEFT(Phone, 1) <> "+"'. The 'Functions' dropdown menu is open, showing options like 'ABS', 'ACOS', 'ADDMONTHS', and 'AND'. The left sidebar shows the 'Setup' menu with options like 'Details', 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', 'Record Types', 'Related Lookup Filters', and 'Search Layouts'. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'.

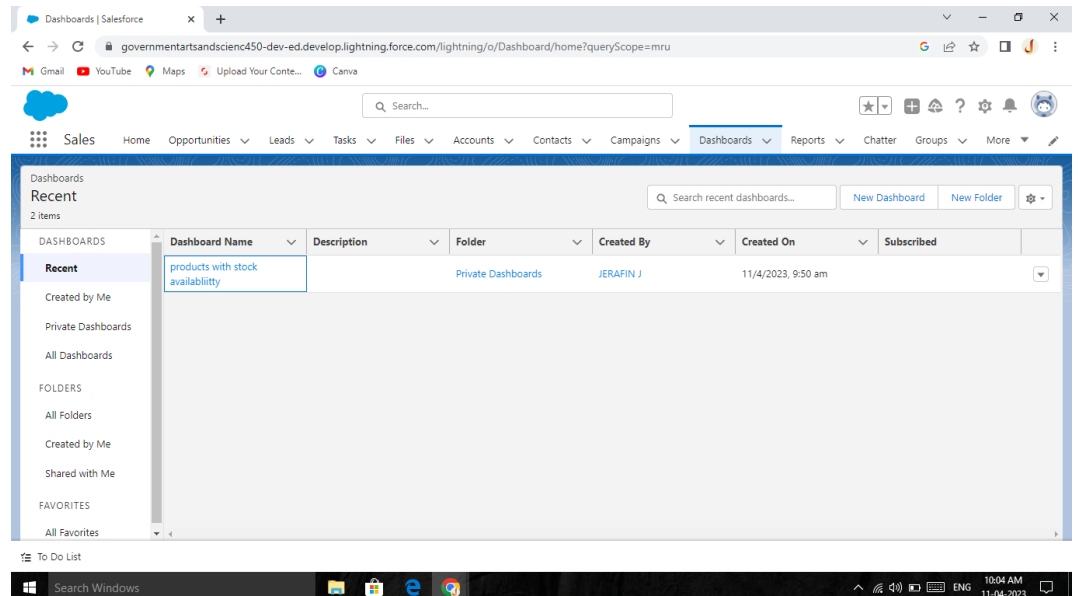
Validation rules verify that the user enters in a record meets the standards you specifies before the user can save the record.

8. Creation of reports



A report is a list of records that meet the criteria you define. It is displayed in salesforce in rows and columns, and can be filtered, grouped, or displayed in a graphical chart.

9. Creation of dashboard



Dashboards in salesforce are the graphical representation of reports. It shows data from source reports as visual components.

4 Trailhead Profile Public URL

Team Lead – <https://trailblazer.me/id/jeraj20>

Team Member 1 - <https://trailblazer.me/id/gokum29>

Team Member 2 – <https://trailblazer.me/id/hariu11>

Team Member 3 – <https://trailblazer.me/id/karug3>

5 ADVANTAGES & DISADVANTAGE

One of the main advantages of retail management is it can optimise all store processes. A company can increase the efficiency of each process and better ensure a high quality standard for employees.

Some of the disadvantages of retail management are it requires more marketing costs, good selling skill is required, high completion, no benefit of bulk buying.

6 APPLICATIONS

Retail is a forward thinking industry with numerous areas. It also houses some of the world's largest corporations. Candidates with a retail management degree can begin their careers in communication, supervision, sales, goods transportation, management, and administrative services.

7 CONCLUSION

In this course we have explored the meaning of the term retailing, marketing, and marketing communications. We have also considered the importance of the marketing mix and identified the different communication tools that the retailer might use to interact and communicate with their target customers.

8 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 diversifications, campaigning, advertising, market research, and segmentation. With the continuous expansion of retail industry, there is a growing demand for retail courses that will prepare students ,to cope the tactics, procedures, and methods that will help them generate more sales and customer satisfaction.