

H.H THE RAJAH'S COLLEGE
PUDUKKOTTAI – 622 001

DEPARTMENT OF MATHEMATICS

NAAN MUDHALVAN – SMART BRIDGE PROJECT

PROJECT TITLE

**RETAIL MANAGEMENT APPLICATION USING
SALESFORCE**

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INTRODUCTION

Retailing encompasses the business activities involved in selling goods and services to consumers for their personal, family, or household etc. A CRM product owner has requested to create two applications, one is a sales app for sales reps to use this application and store customers data, and the second application is a service app for service reps/agents to provide support to customers in dealing cases. To generate business on top of the customers.

1.1 OVERVIEW

Salesforces retail management application provides retailers with reporting and analytics capabilities. It allows retailers to track their key performance indicators (KPIs,) analyse trends, and make data-driven decisions. This helps retailers to optimize their operations and improve their business performance.

1.2 PURPOSE


Retail management application using salesforce allows retailers to manage customer information effectively. It helps retailers to create a 360-degree view of their customers by tracking customer interactions, purchases, and preferences. This helps retailers to provide personalized experiences to their customers.

Salesforce retail management application helps retailers to manage their inventory effectively. It allows retailers to track inventory levels, receive alerts for low inventory, and create purchase orders when needed. This helps retailers to ensure that they always have the right products in stock.

PROBLEM DEFINITION & 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.

[Share template feedback](#)



Build empathy

The information you add here should be representative of the observations and research you've done about your users.

Says

What have we heard them say?
What can we imagine them saying?

what's the problem

current solution

generate ideas

benefit customer service

marketing efforts

customer behavior

Give them a name and a portrait to empathize with your persona.

what's the problem

current solution

generate ideas

benefit customer service

marketing efforts

customer behavior

Does

What behavior have we observed?
What can we imagine them doing?

what's the problem

current solution

generate ideas

benefit customer service

marketing efforts

customer behavior

Thinks

What are their wants, needs, hopes, and dreams? What other thoughts might influence their behavior?

what's the problem

current solution

generate ideas

benefit customer service

marketing efforts

customer behavior

Feels

What are their fears, frustrations, and anxieties? What other feelings might influence their behavior?

what's the problem


current solution

generate ideas

benefit customer service

marketing efforts


customer behavior



Need some inspiration?

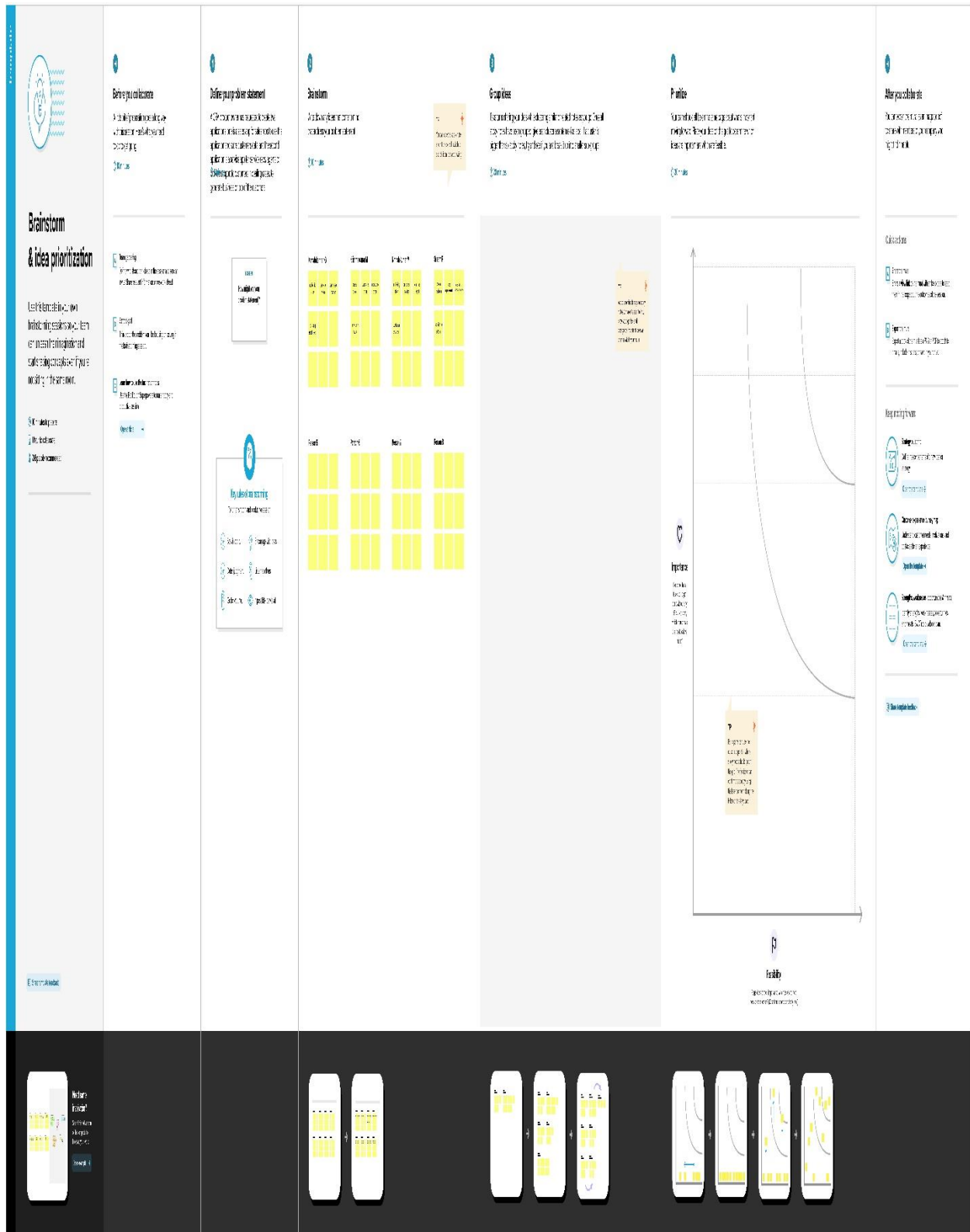
See a finished version of this template to kickstart your work.

[Open example](#)



4

2.2 IDEATION & BRAIN STORMING MAP :



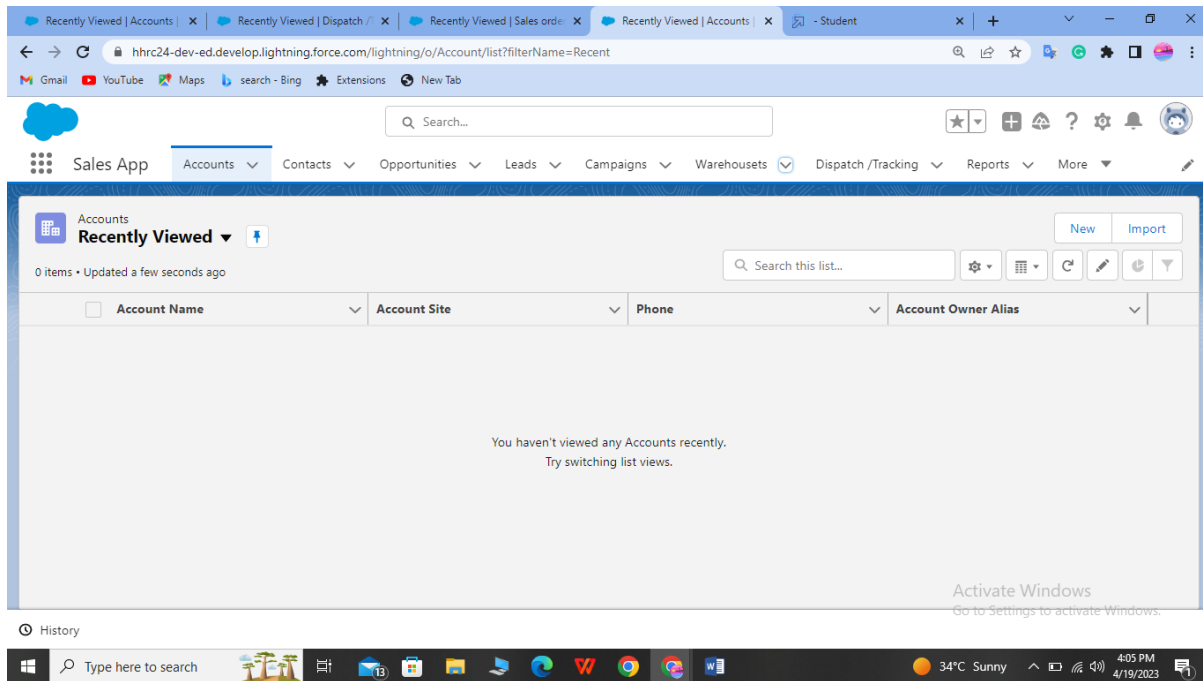
3. RESULT :

DATA MODEL :

Object Name	Fields in the object	
Object 1 Warehouse	Field Label	Data Type
	warehouse	Text
Object 2 Dispatch/Tracking	Field Label	Data Type
	Dispatched	Checkbox
	Expected date of delivery	Date
	Tracking ID	Auto number
	Sales order	Master-Detail
Object 3 Sales orders	Field Label	Data Type
	Sales order name	Text

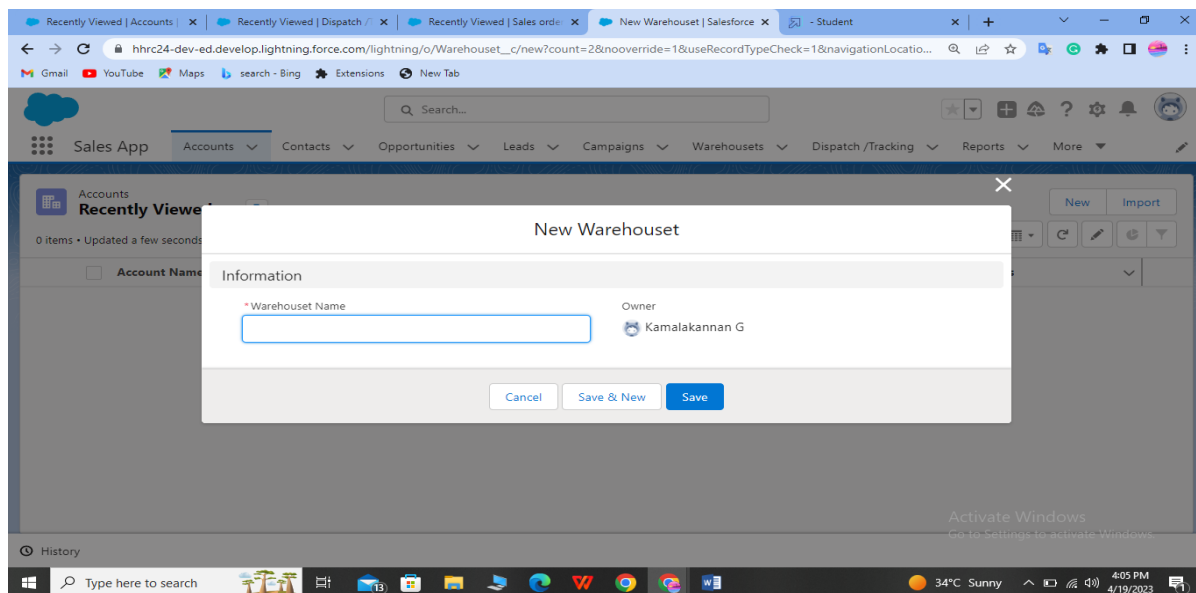
3.2 Activity & Screenshot

Sales app



Overall

Object 1: Warehouses



Warehouses are used to distribute product to retail stores.

Object 2: Dispatched/Tracking

Recently Viewed | Accounts | Recently Viewed | Dispatch | Recently Viewed | Sales order | New Dispatch/ Tracking | Student

hhr24-dev-ed.develop.lightning.force.com/lightning/o/Dispatch_Tracking__c/new?count=3&nooverride=1&useRecordTypeCheck=1&navigationL...

Gmail YouTube Maps search - Bing Extensions New Tab

Sales App

Accounts Recently Viewed

0 items • Updated a few seconds ago

Account Name

New Dispatch/ Tracking

Information

* Dispatch/ Tracking Name

Dispatched

* Engagement Channel Type

Search Sellers...

Expected date of delivery

Tracking id

* Sales order

Cancel Save & New Save

Activate Windows
Go to Settings to activate Windows.

History

Type here to search

34°C Sunny 4:05 PM 4/19/2023

Recently Viewed | Accounts | Recently Viewed | Dispatch | Recently Viewed | Sales order | New Dispatch/ Tracking | Student

hhr24-dev-ed.develop.lightning.force.com/lightning/o/Dispatch_Tracking__c/new?count=3&nooverride=1&useRecordTypeCheck=1&navigationL...

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Sales App

Accounts Recently Viewed

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Search Sales orders...

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Go to Settings to activate Windows.

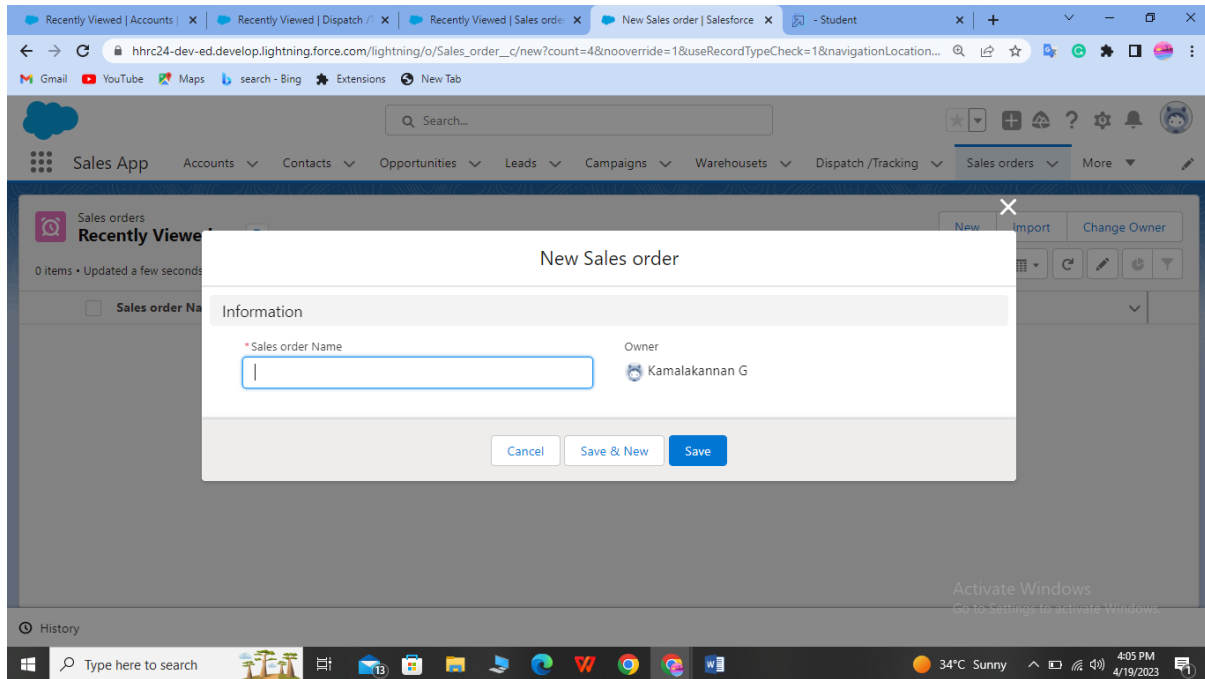
History

Type here to search

34°C Sunny 4:05 PM 4/19/2023

By leveraging these tools effectively, retailers can streamline their processes, reduce costs, and build stronger relationships with their customer.

Object 3: Sales Order



They are used for a variety of purpose that help retailers run their business more effectively.

4 Trailhead Profile Public URL

Team Lead - <https://trailblazer.me/id/kamag10>

Team member 1- <https://trailblazer.me/id/krism74>

Team Member 2- <https://trailblazer.me/id/mkumar2939>

Team Member 3- <https://trailblazer.me/id/srrip5>

5 ADVANTAGE & DISADVANTAGE

Advantages:

There are many advantages to using a retail management application built on the Salesforce platform. Here are some key benefits:

- ❖ **Increased Sales:** Salesforce provides a 360-degree view of your customers and allows you to create personalized marketing campaigns to increase customer engagement and drive sales.
- ❖ **Improved Customer Experience:** With a retail management application on Salesforce, you can provide a seamless and personalized shopping experience to your customers. You can track customer interactions across all channels, including social media, email, and in-store visits, and use that data to create personalized recommendations and promotions.
- ❖ **Efficient Inventory Management:** Salesforce's retail management application allows you to track inventory levels in real-time across all your locations. You can set up automatic alerts for low inventory levels and reorder products as needed to prevent stockouts. **Better Data Analysis:** With Salesforce, you can generate reports and analyze data to gain insights into customer behavior, sales trends, and inventory levels. This information can help you make data-driven decisions to optimize your business operations and improve profitability.
- ❖ **Enhanced Team Collaboration:** Salesforce's retail management application allows your team members to collaborate and share information in real-time. You can set up workflows to automate tasks and streamline processes, freeing up your team to focus on more strategic tasks.

Disadvantages:

- ❖ **Limited expertise:** One disadvantage of retail management of applications using Salesforce could be the cost. Salesforce is a powerful and comprehensive platform, but it can also be expensive. Depending on the size of the retail business, the cost of licensing and implementing Salesforce could be a significant investment.
 - ❖ **Require disadvantage:** Another disadvantage could be the complexity of the system. While Salesforce is designed to be user-friendly, it is still a sophisticated system that requires training and expertise to use effectively. Retail businesses may need to invest in additional training for their employees or hire outside experts to manage the system.
 - ❖ **Inventory management:** Additionally, retail businesses may face integration challenges when using Salesforce. Retailers may need to integrate Salesforce with other systems such as inventory management, shipping, and payment processing. Integration can be complex and time-consuming, and if not done properly, it can lead to data inconsistencies and errors.
- Salesforce offers several solutions for retail management, including Customer Relationship Management (CRM), Marketing Cloud, Commerce Cloud, and Service Cloud. These solutions can be used individually or combined to create a comprehensive retail management system.

APPLICATIONS

- ❖ **CRM:** Salesforce CRM provides a complete view of customer interactions, including their purchase history, preferences, and feedback. This data can be used to personalize the shopping experience, improve customer engagement, and increase sales.
- ❖ **MARKETING CLOUD:** This solution allows retailers to create personalized marketing campaigns that target specific customer segments based on their interests, behavior, and demographics. Retailers can use Marketing Cloud to send email, SMS, and push notifications, as well as to manage social media campaigns.
- ❖ **COMMERCE CLOUD:** This solution provides a complete e-commerce platform that allows retailers to create an online store, manage product catalogs, process payments, and handle fulfillment. Commerce Cloud also offers built-in AI capabilities that can recommend products to customers based on their purchase history and behavior.
- ❖ **SERVICE CLOUD:** This solution allows retailers to provide excellent customer service by managing customer inquiries, complaints, and feedback across multiple channels, including email, phone, social media, and chat. Service Cloud also provides tools for self-service support, such as knowledge bases and community forums.

CONCLUSION

Retail management application using Salesforce can be an effective solution for retailers to manage their operations and improve their customer experience. Some of the benefits of using Salesforce for retail management are: Salesforce can automate various retail operations such as inventory management, order processing, and customer service, which can help retailers save time and improve efficiency. Salesforce can provide retailers with a 360-degree view of their customers, allowing them to personalize the shopping experience, offer targeted promotions, and resolve customer issues quickly. Enhanced sales and marketing: Retailers can leverage Salesforce's robust sales and marketing tools to drive revenue growth and expand their customer base. Real-time data analysis: Salesforce's reporting and analytics capabilities allow retailers to track their performance in real-time and make data-driven decisions to improve their

business. In conclusion, retail management application using Salesforce can help retailers improve their operations, enhance their customer experience, and drive revenue growth.

FUTURE SCOPE

- ❖ **INVENTORY MANAGEMENT:** Retail businesses can use Salesforce to manage their inventory in real-time, track stock levels, and monitor sales trends. With Salesforce, businesses can automate their inventory management processes and make data-driven decisions to optimize their inventory levels.
- ❖ **Customer Relationship Management:** Salesforce can help businesses manage their customer interactions, including sales, marketing, and customer service. Retailers can use Salesforce to capture customer data, analyze customer behavior, and personalize their marketing messages to improve customer engagement.
- ❖ **POINT OF SALE (POS) SYSTEM:** Salesforce can be integrated with a retailer's POS system to streamline the checkout process and enable faster and more accurate transactions. This can lead to improved customer satisfaction and increased sales.
- ❖ **ANALYTICS AND REPORTING:** Salesforce provides powerful analytics and reporting capabilities, which can help retailers gain insights into their business performance. With real-time data, retailers can make informed decisions and identify areas for improvement.
- ❖ **MOBILE APPS:** Retailers can build custom mobile apps using Salesforce, which can be used by employees to manage inventory, process transactions, and communicate with customers. Mobile apps can also be used by customers to browse products, place orders, and receive notifications.