

## RETAIL MANAGEMENT APPLICATION USING SALESFORCE

### Introduction

#### **Overview**

Salesforce can be used to manage orders from retail stores and distributors, including tracking orders, processing payments and managing inventory levels. This can help field sales teams ensure that orders are fulfilled quickly and accurately and that inventory levels are maintained at optimal levels.

#### **Purpose**

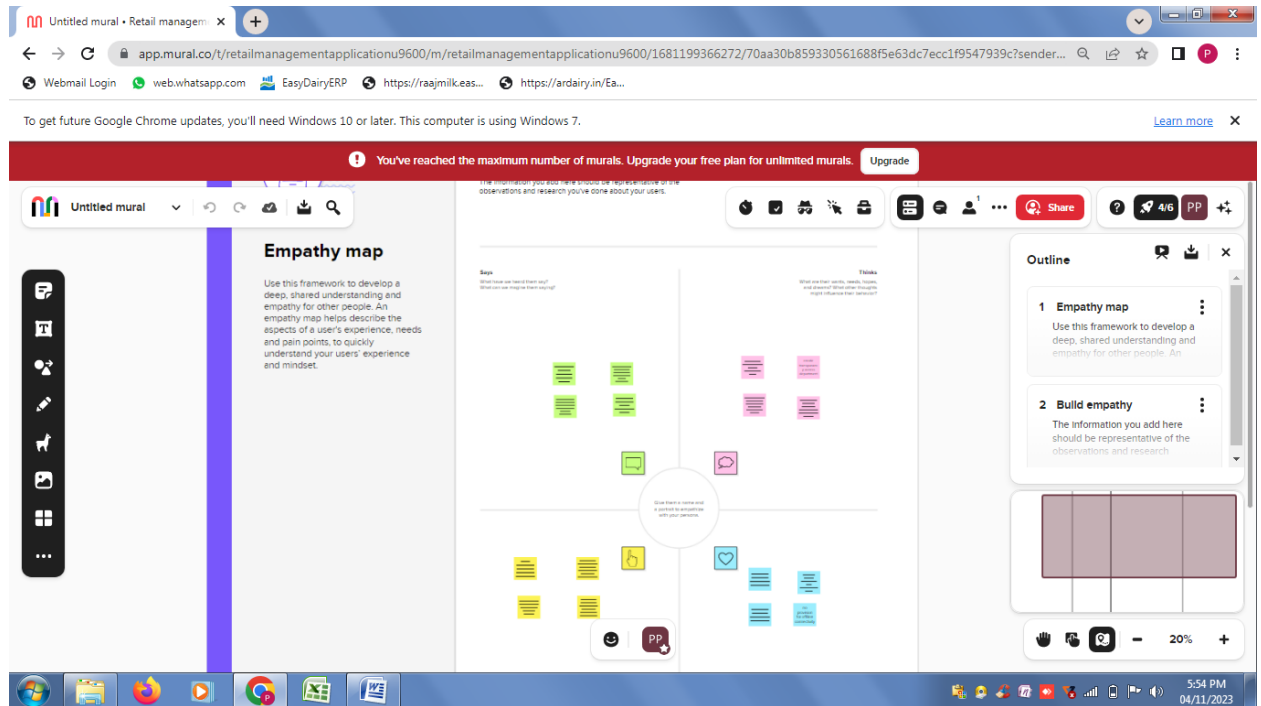
Retail management optimizes internal processes such as inventory management, offline and online storefronts, warehouse operations, payment and accounting and human resources. Retail management improves overall company cohesion. Retail store management improves customer experience and boosts customer satisfaction.

### **Problem definition & Design Thinking**

#### **Empathy Map**

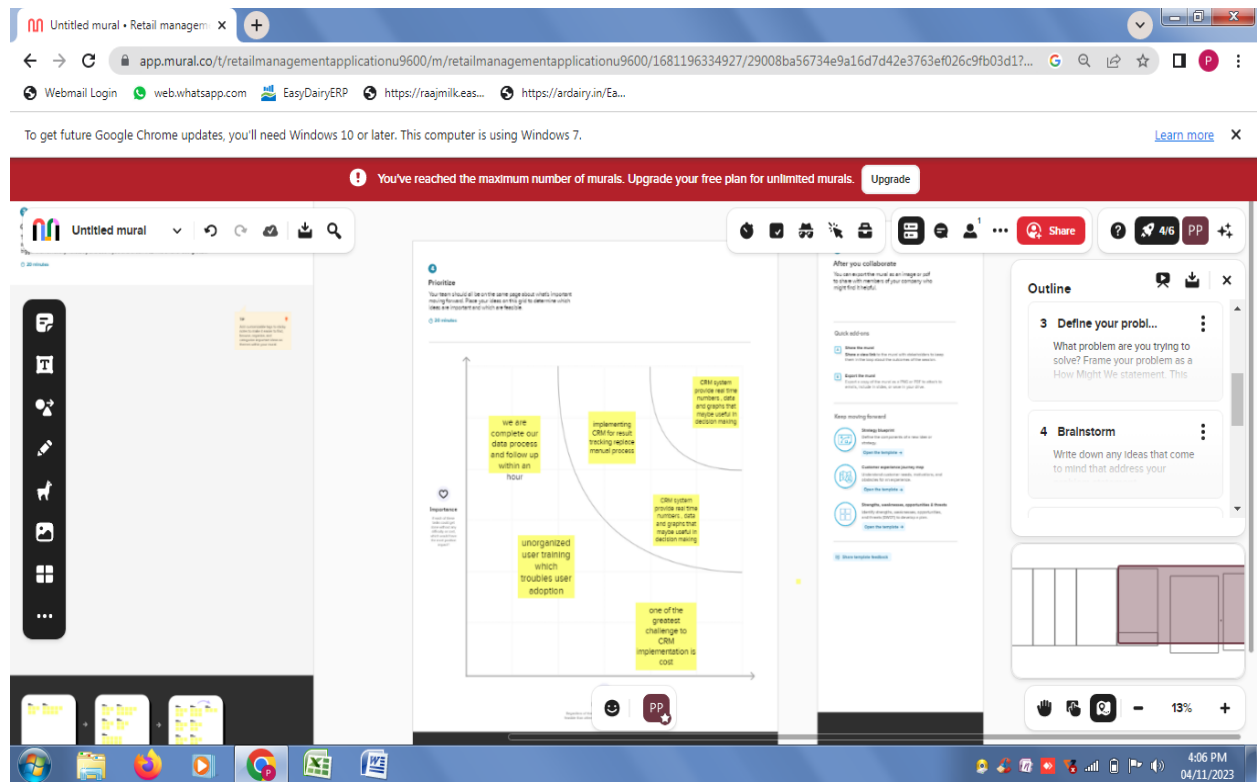
An empathy map helps to map what a design team knows about the potential audience. This tool helps to understand the reason behind some actions a user takes deeply. This tool helps build Empathy towards users and helps design teams shift

focus from the product to the users who are going to use the product.



## Ideation & Brainstorming Map

- ❖ Its helps you remember and recall information.
- ❖ It helps you learn new concepts
- ❖ It's a fun way of learning
- ❖ It makes complex ideas easier to understand
- ❖ It improves your presenting
- ❖ It boots your creativity
- ❖ It improves productivity



## RESULT

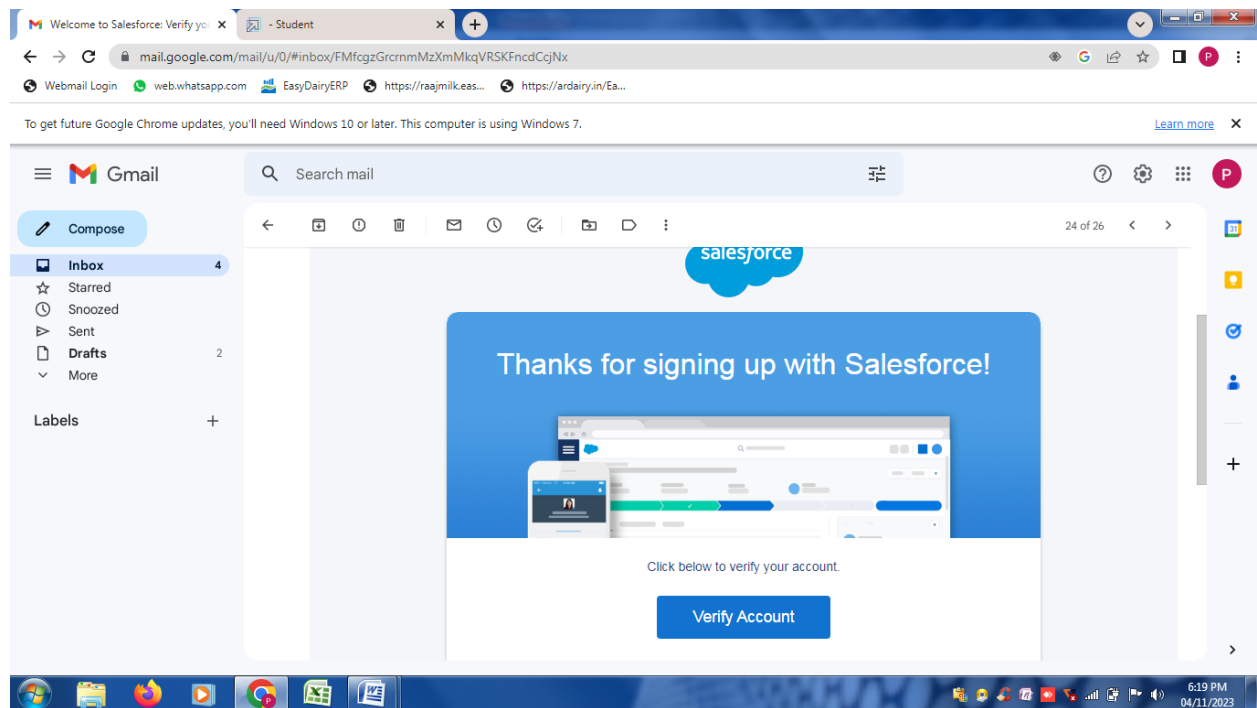
### Data Model:

Object name	Fields in the Object
Dispatch/Tracking	Object Manager
Relationship between objects	Data type – master retail relationship Field name – sales app
Application	App manager App name – Sales app
Custom tabs	Tabs
User	Field – standard platform profile
Validation rule	Object manager – Account object field – validation rule

Cross Object	Contact filed – filed and relationships
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## Activity & Screenshot

### Salesforce



## Object

Welcome to Salesforce: Verify your identity

Custom Objects ~ Salesforce - Dev

Profile - Student

karudakutty5-dev-ed.develop.my.salesforce.com/p/setup/custom/CustomObjectsPage?setupid=CustomObjects&retURL=%2Fui%2Fsetup%2FSetup%3FSetupid%3...

Webmail Login | web.whatsapp.com | EasyDairyERP | https://raajmilk.eas... | https://ardairy.in/Ea...

App Launcher | Sales order | students | parents | Warehouses

Quick Find / Search...

Expand All | Collapse All

Lightning Experience Transition Assistant

Move to the new, more productive Salesforce.

Get Started

Salesforce Mobile Quick Start

Home

Administer

Release Updates

Manage Users

Manage Apps

Manage Territories

Company Profile

Data Classification

Privacy Center

Security Controls

Domain Management

## Custom Objects

Custom objects are database tables that allow you to store data specific to your organization in Salesforce. You can use custom objects to extend Salesforce functionality or to build new application functionality.

Once you have created a custom object, you can create a custom tab, custom related lists, reports, and dashboards for users to interact with the custom object data. You can also access custom object data through the API.

New Custom Object | Schema Builder

Action	Label	Master Object	Deployed	Description
Edit   Del	Dispatched	Sales order	<input type="checkbox"/>	
Edit   Del	Display		<input type="checkbox"/>	
Edit   Del	Expected date of delivery		<input type="checkbox"/>	
Edit   Del	Sales order		<input type="checkbox"/>	
Edit   Del	Tracking Id		<input type="checkbox"/>	
Edit   Del	Warehouse		<input checked="" type="checkbox"/>	
Edit   Del	parent		<input checked="" type="checkbox"/>	
Edit   Del	student		<input checked="" type="checkbox"/>	
Deleted Objects (4)				

4:18 PM 04/11/2023

## Relationship b/w object

Welcome to Salesforce: Verify your identity

Custom Object: Dispatched ~ Dev

Student

Reports and DB 2 | NaanMudi

Object Manager | Salesforce

karudakutty5-dev-ed.develop.my.salesforce.com/0112w000003Ebx0?setupid=CustomObjects

Webmail Login | web.whatsapp.com | EasyDairyERP | https://raajmilk.eas... | https://ardairy.in/Ea...

App Launcher | Sales order | students | parents | Warehouses

Quick Find / Search...

Expand All | Collapse All

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## Custom Object Dispatched

Standard Fields (3) | Custom Fields & Relationships (1) | Validation Rules (0) | Page Layouts (1) | Field Sets (0) | Compact Layouts (1) | Search Layouts (4) | Buttons, Links, and Actions (8) | Record Types (0) | Object Limits (10)

### Custom Object Definition Detail

Edit | Delete

Singular Label	Plural Label	Object Name	API Name	Description
Dispatched	Dispatcheds	Dispatched	Dispatched__c	Enable Reports <input checked="" type="checkbox"/>
				Track Activities <input type="checkbox"/>
				Allow in Chatter Groups <input type="checkbox"/>
				Allow Sharing <input checked="" type="checkbox"/>
				Allow Bulk API Access <input checked="" type="checkbox"/>
				Allow Streaming API Access <input checked="" type="checkbox"/>
				Track Field History <input type="checkbox"/>
				Enable Licensing <input type="checkbox"/>
				Deployment Status: In Development
				Allow Search <input checked="" type="checkbox"/>
				Help Settings: Standard salesforce.com Help Window
				Modified By: Poovina P 08/04/2023, 11:23 am

Created By: Poovina P 10/03/2023, 3:04 pm

### Standard Fields

Standard Fields Help

Action	Field Label	Field Name	Data Type	Controlling Field	Indexed
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4:28 PM 04/11/2023

# Application

The screenshot shows the Salesforce Lightning Experience App Manager interface. The browser address bar displays the URL: `resilient-raccoon-t7xmw0-dev-ed.trailblaze.lightning.force.com/lightning/setup/NavigationMenus/home`. The page title is "Lightning Experience App Manager". The left sidebar contains a navigation menu with the following items: "Setup", "Home", "Object Manager", "Salesforce Mobile App", "Data", "Mass Transfer Approval Requests", "Apps", "App Manager", "AppExchange Marketplace", "Connected Apps", "Connected Apps OAuth Usage", "Manage Connected Apps", "Lightning Bolt", "Flow Category", "Lightning Bolt Solutions", "Mobile Apps", and "Salesforce". The main content area is titled "Clone Apps(Beta)" and includes a toggle switch for "Enable App Cloning" which is currently disabled. Below this, there is a table with 29 items, sorted by App Name. The table has the following columns: "App Name", "Developer Name", "Description", "Last Modified", "App Type", and "Visibility". The table contains the following data:

App Name	Developer Name	Description	Last Modified	App Type	Visibility
18 Sales	Sales	The world's most popular sales force automation (S...	2/28/2023, 6:26 A...	Classic	
19 Sales	LightningSales	Manage your sales process with accounts, leads, op...	2/28/2023, 6:28 A...	Lightning	✓
20 sales app	sales_app		4/11/2023, 7:02 A...	Lightning	✓
21 Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with mul...	2/28/2023, 6:26 A...	Lightning	✓

# Layouts

resilient-raccoon-t7xmw0-dev-ed.trailblaze.lightning.force.com/lightning/setup/CustomTabs/home

Setup Home Object Manager

tab

User Interface

- Loaded Console Tab Limit
- Rename Tabs and Labels
- Tabs**

Didn't find what you're looking for? Try using Global Search.

### Custom Tabs

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

Action	Label	Tab Style	Description
<a href="#">Edit</a>   <a href="#">Del</a>	Applicant	Castle	
<a href="#">Edit</a>   <a href="#">Del</a>	Energy Audits	Balls	
<a href="#">Edit</a>   <a href="#">Del</a>	Knowledge	Books	

#### Web Tabs

No Web Tabs have been defined

## User

resilient-raccoon-t7xmw0-dev-ed.trailblaze.lightning.force.com/lightning/setup/ManageUsers/home

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

### All Users

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

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> <a href="#">Edit</a>	Chatter Expert	Chatter	chatter_0069v000001pccmuaas.nolottdiaet@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> <a href="#">Edit</a>	Daniels, Amy	alorr	oqovina324@gmail.com	Sales Engineer	<input type="checkbox"/>	Identity User
<input type="checkbox"/> <a href="#">Edit</a>	Kim, Ted	tkim	oradeso324@gmail.com	Western Sales Team	<input type="checkbox"/>	Standard Profile - No Acct Delete
<input type="checkbox"/> <a href="#">Edit</a>   <a href="#">Login</a>	Kim, Ted	tkim	oradeso324@gmail.com	Western Sales Team	<input checked="" type="checkbox"/>	Standard Profile - No Acct Delete
<input type="checkbox"/> <a href="#">Edit</a>	Larkin, Noah	nlerk	vinotbe0033@gmail.com	Customer Support - International	<input type="checkbox"/>	Standard Profile - No Acct Delete
<input type="checkbox"/> <a href="#">Edit</a>   <a href="#">Login</a>	Larkin, Noah	nlerk	kavi324@gmail.com	Customer Support - International	<input checked="" type="checkbox"/>	Salesforce API Only System Integrations
<input type="checkbox"/> <a href="#">Edit</a>	Lorette, Maya	mlorr	oradeso0033@gmail.com	Western Sales Team	<input type="checkbox"/>	Standard Profile - No Acct Delete
<input type="checkbox"/> <a href="#">Edit</a>   <a href="#">Login</a>	Lorette, Maya	mlorr	oradeso324@gmail.com	Western Sales Team	<input checked="" type="checkbox"/>	Standard Profile - No Acct Delete

# Validation Rules

The screenshot shows the Salesforce Setup interface. The breadcrumb trail is: SETUP > OBJECT MANAGER > Account. The left sidebar contains a list of setup categories: 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 main content area is titled 'Validation Rules' and shows '1 Items, Sorted by Rule Name'. A table lists the validation rules:

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Karudakutty0036	Top of Page	+919097654328	✓	Poovina P, 4/11/2023, 7:12 AM

At the bottom right of the table, there is a 'New' button and a dropdown arrow. The browser's taskbar at the bottom shows the time as 4:43 PM on 04/11/2023.

# Cross Object Formula



Browser tabs: Welcome to Salesforce: Verify, Custom Object: Dispatched, Student, Reports and DB 2 | NaanMudi, Contact | Salesforce

Address bar: resilient-raccoon-t7xmw0-dev-ed.trailblaze.lightning.force.com/lightning/setup/ObjectManager/Contact/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER  
Contact

Details

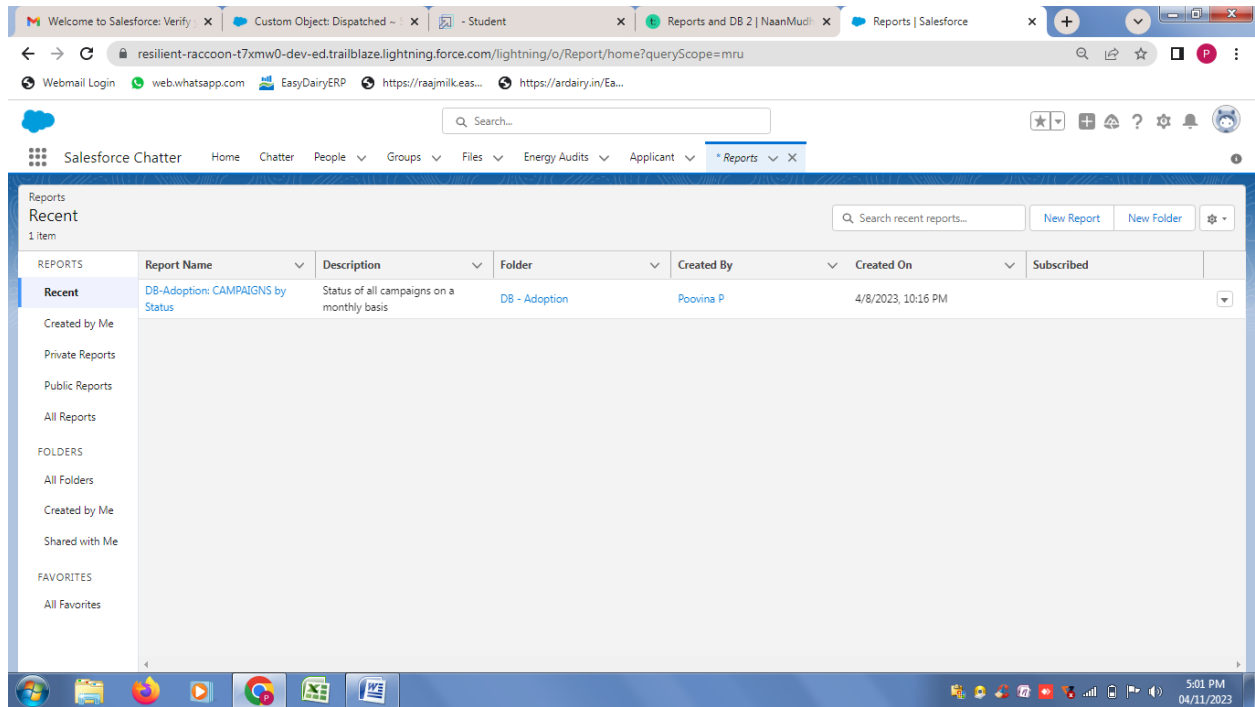
**Fields & Relationships**  
33+ Items, Sorted by Field Label

Quick Find: [ ] New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Account Name	AccountId	Lookup(Account)		✓
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)		
Department	Department	Text(80)		
Description	Description	Long Text Area(32000)		
Do Not Call	DoNotCall	Checkbox		

Windows taskbar: 4:58 PM 04/11/2023

## Reports



## Trailhead Profile Public URL

Team Lead – <https://trailblazer.me/id/kavik58>

Team member 1- <https://trailblazer.me/id/muthurm6>

Team member 2- <https://trailblazer.me/id/karuda3>

Team member 3- <https://trailblazer.me/id/ptharshini1>

## Project Report Template

### Advantages:

The customer gets instant satisfaction and the customer move off with their purchases immediately. In the retails sector the staff also plays a major role in building customer loyalty with the assurance that customers return often.

- ❖ Requires less capital
- ❖ More profit margin than wholesalers
- ❖ Better customer relation
- ❖ Credit facility
- ❖ No liability towards the buyers

### **Disadvantages:**

- ❖ Requires more marketing costs
- ❖ Good selling skill is required
- ❖ High competition
- ❖ No benefits of bulk buying

### **Applications**

Retail management includes all the steps required to bring the customers into the store and fulfill their buying needs. Retail management makes shopping a pleasurable experience and ensures the customers leave the store with a smile. In simpler words, retail management helps customers shop without any difficulty.

### **Conclusion**

Retailing, thus enjoys many unique features. Inefficiency in retailing leads to lower profitability of the retailers and lower service outputs for the consumers. Steps to strengthen the position of the retailing industry must be taken. Such steps may include establishment of retailers co-operatives, merger and buyout, use of technology to the greatest possible extent, setting up of non-store retailing centers and increase in franchisee network.

## **Future scope**

Supervisory, client communication, merchandise shipment, sales, management, and administrative services are all options for candidates with a retail management background. More than 2 million jobs are available in retail management around the world.