

# **PROJECT REPORT TEMPLATE**

## **RETAIL MANAGEMENT APPLICATION USING SALESFORCE VIEW**

### **1:- INTRODUCTION**

#### **1.1 Overview**

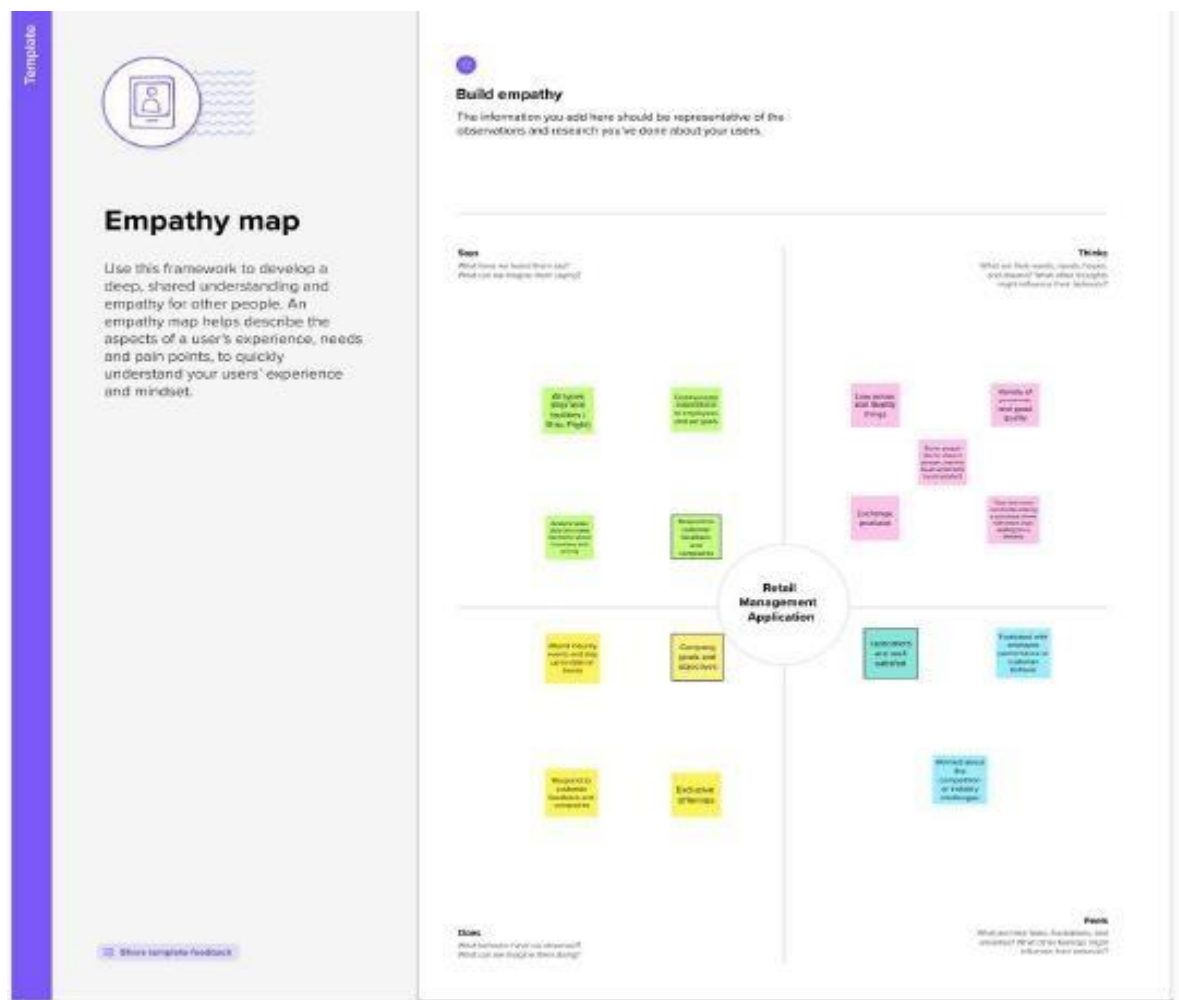
A **retail CRM**, on the other hand, is optimized to help support the high frequency, repeat purchasing of a business-to-consumer (B2C) model. Good retail CRM software will provide insights on when it's best to reach out to a specific customer again and what the customer is likely looking for. For example, Endear's CRM solution informs its users about a customer's lifetime spend and their average order value (AOV), along with a thorough omnichannel order history so that sales associates know what to focus on in their outreach.

#### **1.2 Purpose**

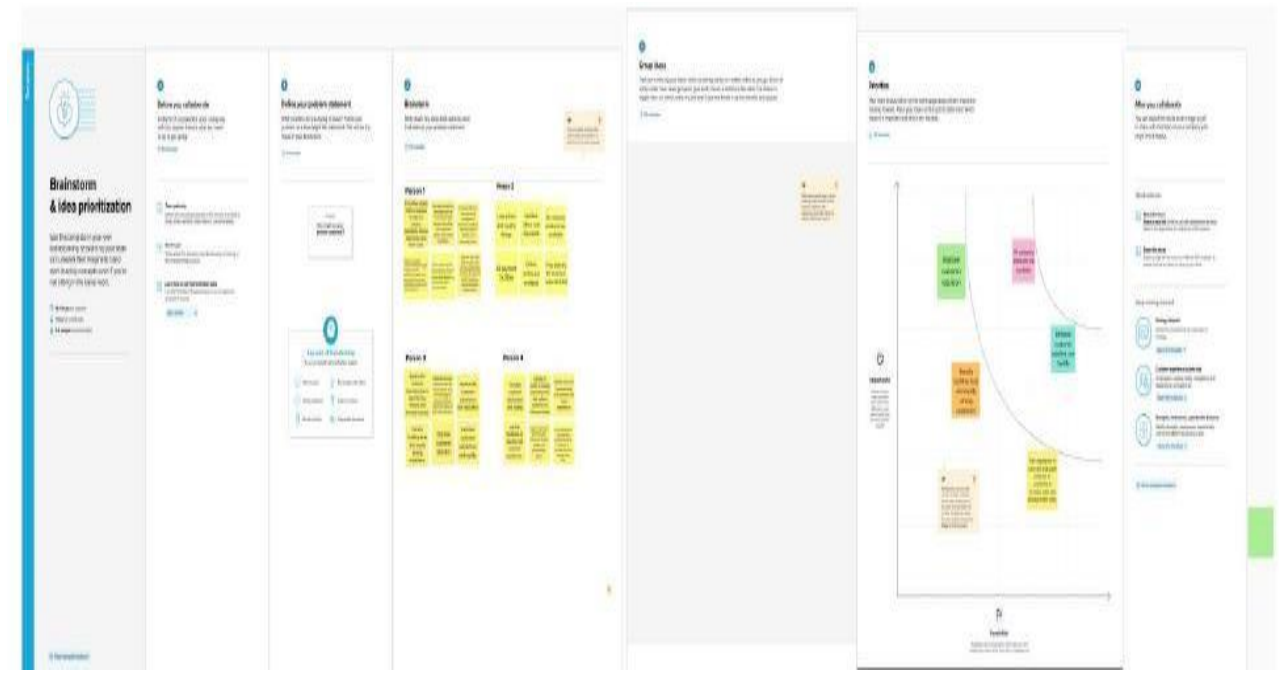
A retail management system (RMS) is a platform that combines several modules to aid in the day-to-day operation of a retail store or chain, such as managing and buying inventory, checking out customers, scheduling employee shifts, keeping track of finances, etc.

## 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		
1)Display Tracking	S.NO	FIELD LABEL	DATA TYPE
	1	Field Label	Data Type
	2	Dispatched	Checkbox
	3	Expected date of delivery	Date/Time
	4	Tracking Id	Text
2)Warehouse	1	Field Label	Data Type
	2	Product Name	Text
	3	Stock Available	Number

### 3.2 ACTIVITY & SCREENSHOT

The image displays two screenshots of the Salesforce Setup interface, specifically the 'Object Manager' section. Both screenshots show the 'Fields & Relationships' tab for a specific object, with a sidebar on the left containing navigation links like 'Details', 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Units', 'Record Types', 'Related Lookup Filters', and 'Search Layouts'.

**Top Screenshot: Display/Tracking Object**

The top screenshot shows the 'Display/Tracking' object. The 'Fields & Relationships' section lists 7 items, sorted by Field Label. The table below shows the details of these fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Creation of object Name	Name	Text(255)		✓
Dispatched	Dispatched_c	Checkbox		
Expected date of delivery	Expected_date_of_delivery_c	Date/Time		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		✓
Tacking id	Tacking_id_c	Text(255) (External ID)		✓

**Bottom Screenshot: Warehouse Object**

The bottom screenshot shows the 'Warehouse' object. The 'Fields & Relationships' section lists 6 items, sorted by Field Label. The table below shows the details of these fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		✓
Product Name	Product_Name_c	Text(255)		
stock available	stock_available_c	Number(18, 0)		
Warehouse Name	Name	Text(255)		✓

#### **4:- TRAILHEAD PROFILE PUBLIC URL**

Team Lead - <http://trailblazer.me/id/kmadhankumar20>  
Team Member 1- <https://trailblazer.me/id/anish33>  
Team Member 2- <trailblazer.me/id/Dhanush0703>  
Team Member 3- <trailblazer.me/id/mmohan726>

#### **5:- ADVANTAGES**

1. Increased Sales: Effective retail management can lead to an increase in sales through effective inventory management, merchandising, and sales techniques.
2. Customer Satisfaction: Retail management helps in creating a positive customer experience maintaining the quality of the products and services offered, and providing.
3. Cost Control: Effective retail management can lead to cost savings through efficient inventory management, staffing, and operational practices.
4. Improved Brand Image: Successful retail management can improve the brand image and reputation of a business, leading to increased customer loyalty and trust.
5. Better Decision Making: Retail management provides informed decisions about pricing, promotions, and product offering.

## **DISADVANTAGE**

1. High Competition: Retail management operates in a highly competitive e challenging to stand out from the competition.
2. High Staff Turnover: Retail management has high staff turnover rates, which can impact productivity and customer service.
3. Technological Challenges: Keeping up with the latest technology can be costly, and retail management may struggle to keep up with the fast
4. Seasonal Fluctuations: Retail management is affected by seasonal fluctuations, which can sales and profitability.
5. External Factors: Retail management is vulnerable to external factors such as economic conditions, natural disasters, and changes in consumer behavior, which can impact sales and profitability

## **6: - APPLICATIONS**

1. Inventory Management: Retail management helps businesses manage their inventory by tracking stock levels, monitoring sales trends, and identifying slow reduce waste, increase sales, and improve customer satisfaction.
2. Point of Sale (POS) Systems: POS systems are an essential tool in retail management. They allow businesses to process sales transactions, track sales data, manage inventory, and generate reports. POS systems can also integrate with other retail management tools, such as customer relationship management (CRM) software.
3. Customer Relationship Management (CRM): Retail management involves managing customer relationships through CRM systems. These systems allow businesses to t and purchase history, and use that information to personalize marketing efforts and improve customer satisfaction.
4. Staff Management: Retail management includes managing staff, including scheduling, training performance management. Effective staff management can improve productivity, reduce turnover, and enhance the customer experience.
5. Overall, the applications of retail management are essential for businesses to streamline their operations, improve efficiency, and increase profitability.

## **7:- CONCLUSION**

Businesses in the retail industry need to implement effective retail management strategies to remain competitive and profitable in today's fast changing retail environment.

## **8:- FUTURE SCOPE**

The future of retail management is exciting and challenging. Retailers must adapt to changing consumer behavior and new technologies to remain competitive and profitable in the fast-paced retail environment.