

PROJECT NAME : RETAIL MANAGEMENT SYSTEM USING  
SALES FORCE

TEAM ID : CC31165BCA19B1283DC4B3E

TEAM LEADER : P.MURUGAN

TEAM MEMBERS : A.SURYA

RAJALAKSHMI

A.DEEPAN RAJ

## 1 INTRODUCTION

### 1.1 Overview

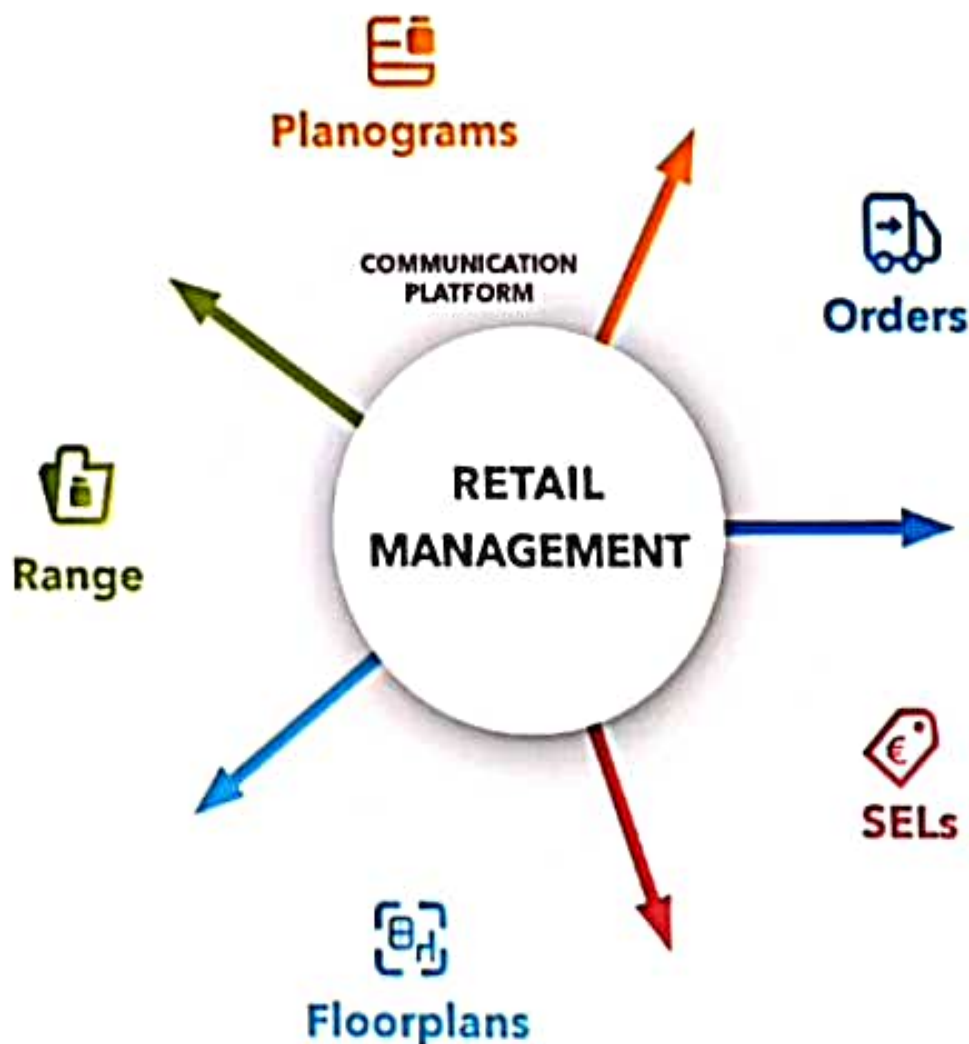
Retailing encompasses the business activities involved in selling goods and services to consumers for their personal, family, or household etc. A CRM product owner has requested to create two applications, one is a sales app for sales reps to use this application and store customers data, and the second 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.

### 1.2 Purpose

Retail management saves time and ensures the customers easily locate their desired merchandise and return home satisfied.

## 2 PROBLEM DEFINITION & DESING THINKING

### 2.1 Empathy Map



## INTRODUCTION

Sales force management is the **soul of the company**. Establishing a world recognize brand does not only require marketing and advertise efforts, but it also requires the sales representatives or in simple words sale force along with all other promotional activities.

- Sales force • Division of a business **responsible** for **selling products** or services.
- Sales force is **linking** between **companies** and **customer**. Therefore, companies have to be careful in designing and structuring sales force.

# Steps for handling complaints

At the organization's level, there is the need for a complaint handling system which will involve the following steps as a minimum;

**Acknowledge receipt of the complaint**

It is important that you acknowledge the receipt of all complaints, verbal or written. Preferably allocate a complaint reference number and provide the customer with a contact point for further correspondence.

**Accurately record complaint information and make it accessible**

Make sure that your recorded version of the complaint matches exactly what the customer said. Also make sure that the complaint record is accessible by any branch of the organization that the customer may contact.

**Attach timeframes for resolution of complaint**

The company should attempt to resolve complaints on first contact, but if this is not possible, then a complaint should be finalized within a specific number of days eg. 30 days.

## Common sales force structures:

- **Territorial structure** is used where every sales representative is assigned specific geographical area. This structure is preferred for building relationships with locals.
- **Product structure** is used for complex and un- related product portfolio. Here the sales people are directly associated with research and development of the products.

## ■ Recruitment process follows five stages:

1. Preparation of job description and personnel specifications
2. Identification of source of requirement and method of communication
3. Design of application form
4. Interview
5. Supplementary selection aids



## How to Handle Customer Complaints

- Listen Repeat
- Apologize
- Acknowledge
- Explain action
- Thank
- Follow up



- Remember not to take it personally
- Remain calm
- Focus on the problem and not person
- Turn unhappy people into happy customers



Search Setup



Setup

Home

Object Manager



SETUP > OBJECT MANAGER

Dispatch

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

List View Button Layout

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

Fields

Quick Find

5 Items, containing 1 new record

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL



FIELD NAME

DATA TYPE

CONTROLLING FIELD

INDEXED

Created By

CreatedById

Lookup(User)

Dispatch Name

Name

Text(80)



Last Modified By

LastModifiedById

Lookup(User)

Sales Order

SalesOrder\_\_c

Master-Detail(Order)



Tracking ID

Tracking\_ID\_\_c

Text(40)







Search Setup



Setup

Home

Object Manager



SETUP > OBJECT MANAGER

Warehouse

Edit

Delete

### Details

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Flow Triggers

Validation Rules

### Details

Description

API Name

Warehouse\_\_c

Custom

✓

Singular Label

Warehouse

Plural Label

Warehouses

Enable Reports

✓

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window



## Step 3. Add to Custom Apps

Step 3 of 3

Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.

Custom App	<input checked="" type="checkbox"/> Include Tab
Platform (standard__Platform)	<input checked="" type="checkbox"/>
Sales (standard__Sales)	<input checked="" type="checkbox"/>
Service (standard__Service)	<input checked="" type="checkbox"/>
Marketing (standard__Marketing)	<input checked="" type="checkbox"/>
Sample Console (standard__ServiceConsole)	<input checked="" type="checkbox"/>
High Volume Customer Portal User	<input checked="" type="checkbox"/>
Authenticated Website User	<input checked="" type="checkbox"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>
Community (standard__Community)	<input checked="" type="checkbox"/>
Site.com (standard__Sites)	<input checked="" type="checkbox"/>
Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>
Content (standard__Content)	<input checked="" type="checkbox"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>
Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>
Service Console (standard__LightningService)	<input checked="" type="checkbox"/>
Sales (standard__LightningSales)	<input checked="" type="checkbox"/>
Lightning Usage App (standard__LightningInstrumentation)	<input checked="" type="checkbox"/>
Digital Experiences (standard__SalesforceCMS)	<input checked="" type="checkbox"/>
Queue Management (standard__QueueManagement)	<input checked="" type="checkbox"/>
Data Manager (standard__DataManager)	<input checked="" type="checkbox"/>
Subscription Management (standard__RevenueCloudConsole)	<input checked="" type="checkbox"/>
Salesforce Scheduler Setup (standard__LightningScheduler)	<input checked="" type="checkbox"/>
Bolt Solutions (standard__LightningBolt)	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Append tab to users' existing personal customizations	

Previous

Save

Cancel



SETUP  
Tabs



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

List View Button Layout

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

Details

Description

API Name

Dispatch\_\_c

Custom

✓

Singular Label

Dispatch

Plural Label

Dispatches

Enable Reports

✓

Track Activities

Track Field History

Deployment Status

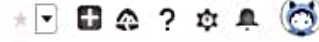
Deployed

Help Settings

Standard salesforce.com Help Window

Edit

Delete



Search Setup



## Tracking

### Details

### Details

Edit Delete

Fields & Relationships

Page Layouts

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Restriction Rules

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Flow Triggers

Validation Rules

Description

API Name

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Custom

✓

Singular Label

Tracking

Plural Label

Trackings

Enable Reports

✓

Track Activities

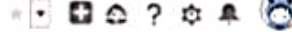
Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window



Search Setup



Setup

Home

Object Manager

Tab

Feature Settings

Analytics

Tableau

Tableau Embedding

User Interface

Loaded Console Tab Limit

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
<a href="#">Edit</a> / <a href="#">Del</a>	Warehouses	Building	

## Web Tabs

New What Is This?

No Web Tabs have been defined

## Visualforce Tabs

New What Is This?

No Visualforce Tabs have been defined

## Lightning Component Tabs

New What Is This?

No Lightning component tabs have been defined

## Lightning Page Tabs

New What Is This?

No Lightning Page Tabs have been defined



SETUP

Tabs

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[Help for this Page](#)

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### Custom Object Tabs

[New](#) [What Is This?](#)

Action	Label	Tab Style	Description
<a href="#">Edit</a>   <a href="#">Del</a>	Dispatches	 Boat	
<a href="#">Edit</a>   <a href="#">Del</a>	Trackings	 Trophy	
<a href="#">Edit</a>   <a href="#">Del</a>	Warehouses	 Building	

### Web Tabs

[New](#) [What Is This?](#)

No Web Tabs have been defined

### Visualforce Tabs

[New](#) [What Is This?](#)

No Visualforce Tabs have been defined

### Lightning Component Tabs

[New](#) [What Is This?](#)

No Lightning component tabs have been defined

### Lightning Page Tabs

[New](#) [What Is This?](#)

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