Build a Retail Management System using Salesforce

INTRODUCTION:

OVERVIEW

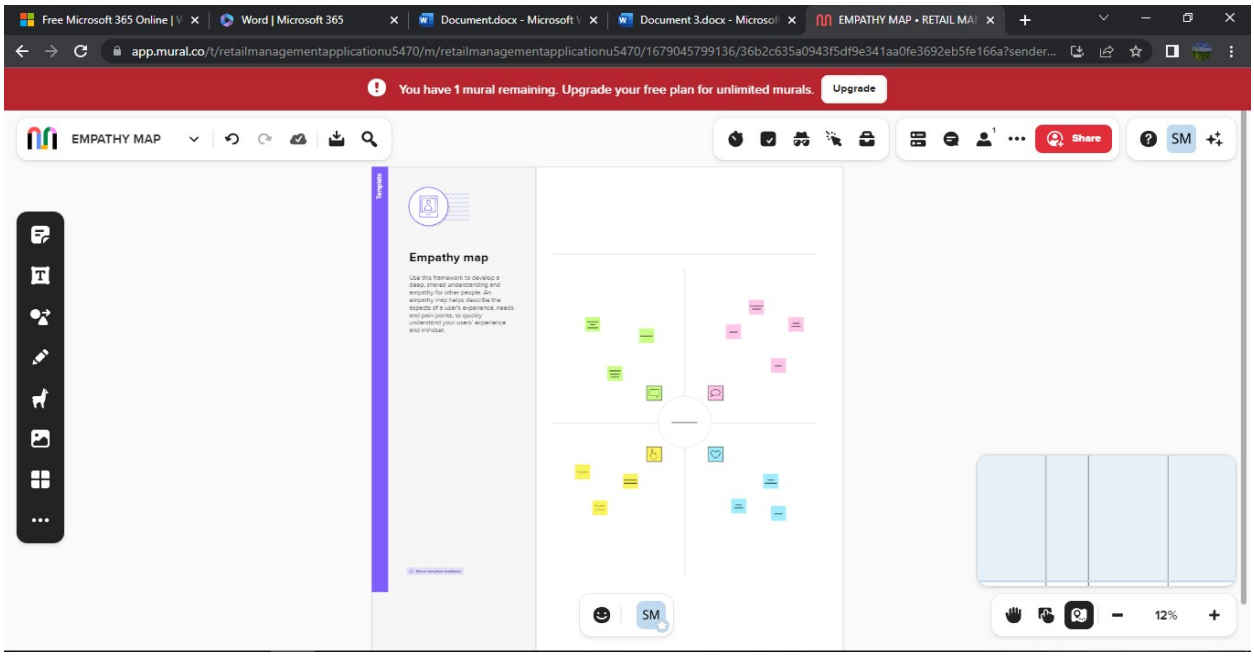
This project helps to develop a retail management system using salesforce. Salesforce is customer relationship management application which is being used in almost all companies to have a friendly relationship with the customer.in our project. We have created a retail management system for the customers.

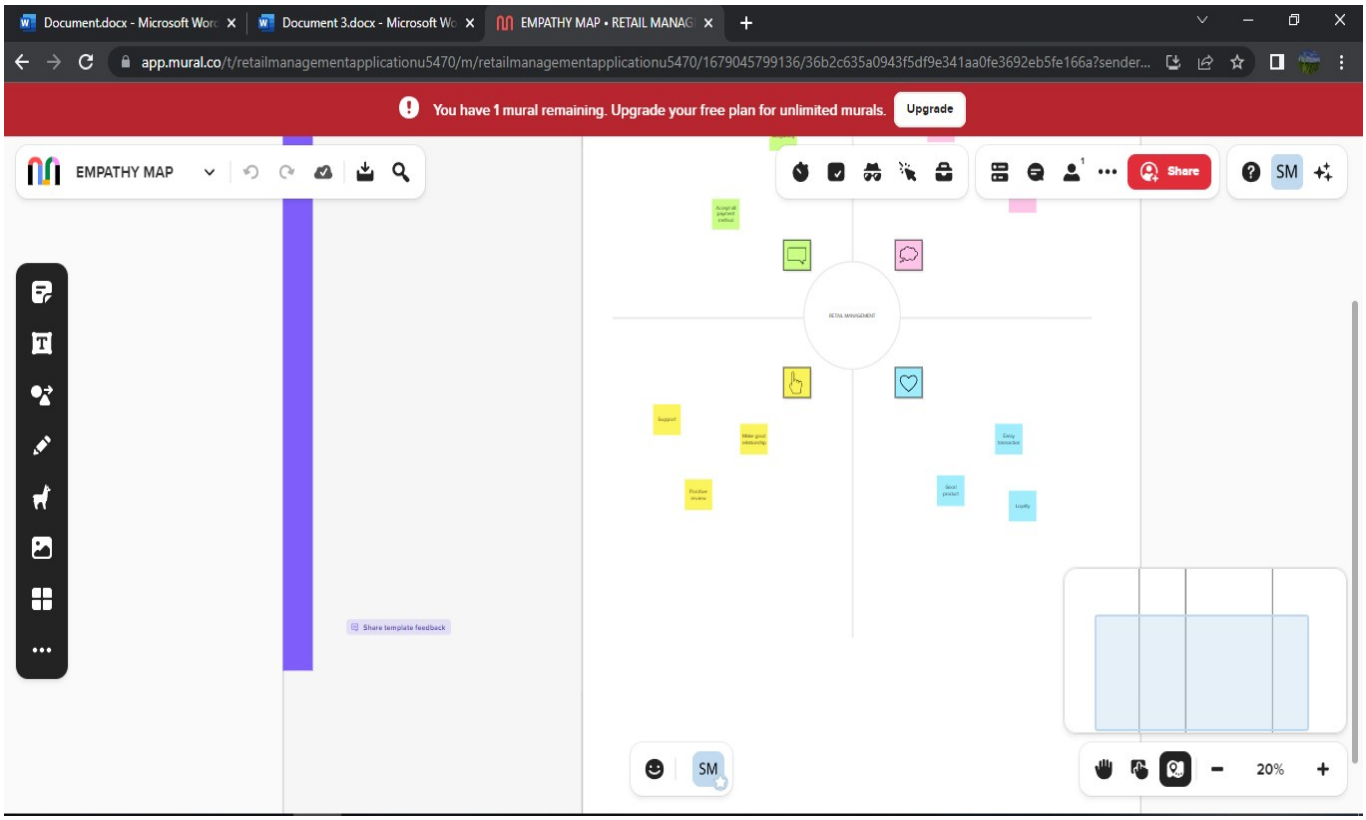
PURPOSE

It aims to produce real time knowledge of the salesforce and how we can build an app using salesforce. In this project we do promotions by using object, we capture customers data, we capture leads here, employees data of customer, SMB sales orders data, we store product details, we capture stocks data, this is an actual order which has invoice details, orders , we store product details, we capture stocks data, this is an actual order which has invoice details, orders , we store product details, we capture stocks , we store product details, we capture stocks, order dispatch related info will be stored here, historical problem of customers will be stored here.

DEFINITION AND PROBLEM DESIGN THINKING

EMPATHY MAP

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EMPATHY MAP • RETAIL MANAG
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You have 1 mural remaining. Upgrade your free plan for unlimited murals.
Upgrade
EMPATHY MAP
Share
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Share template feedback
SM
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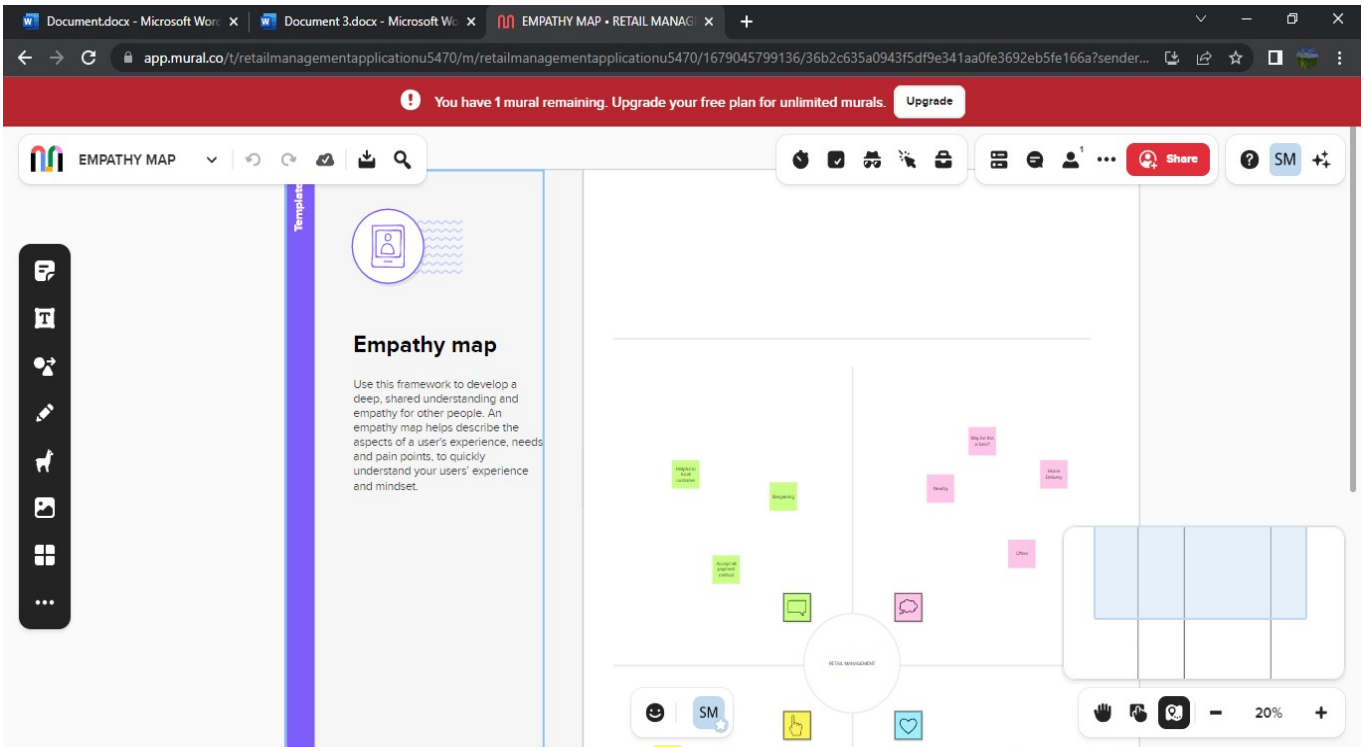
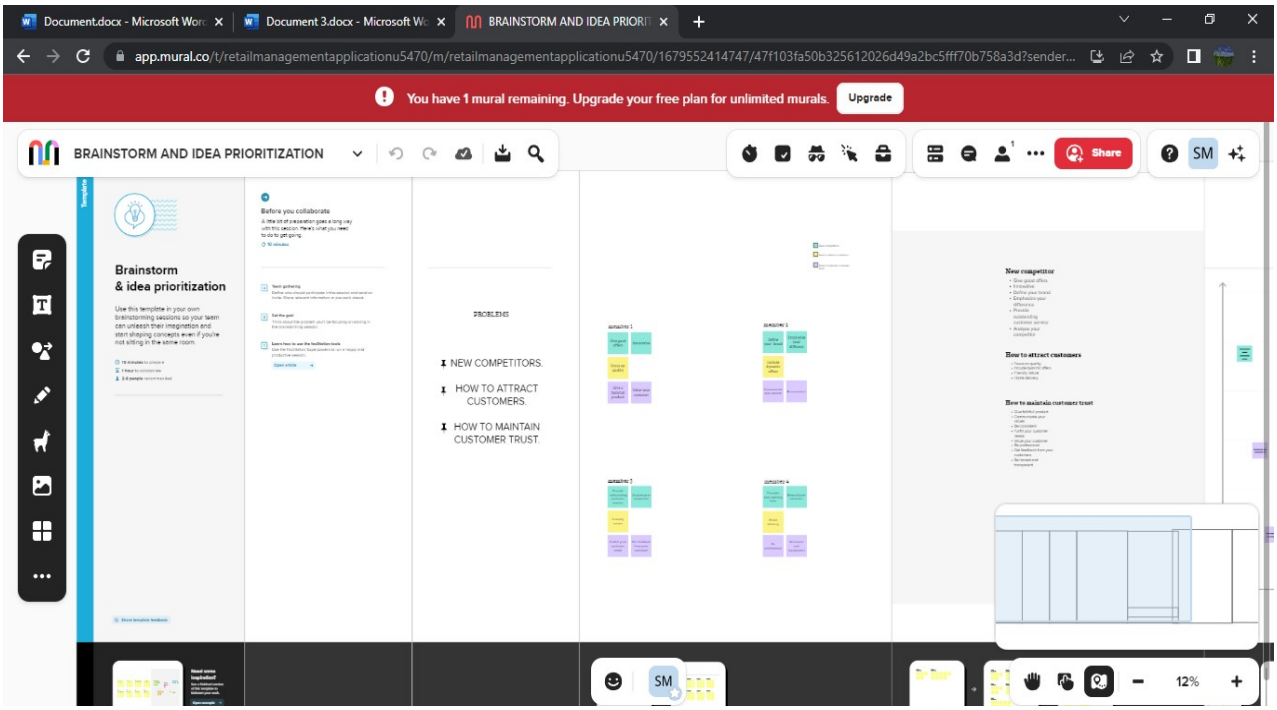
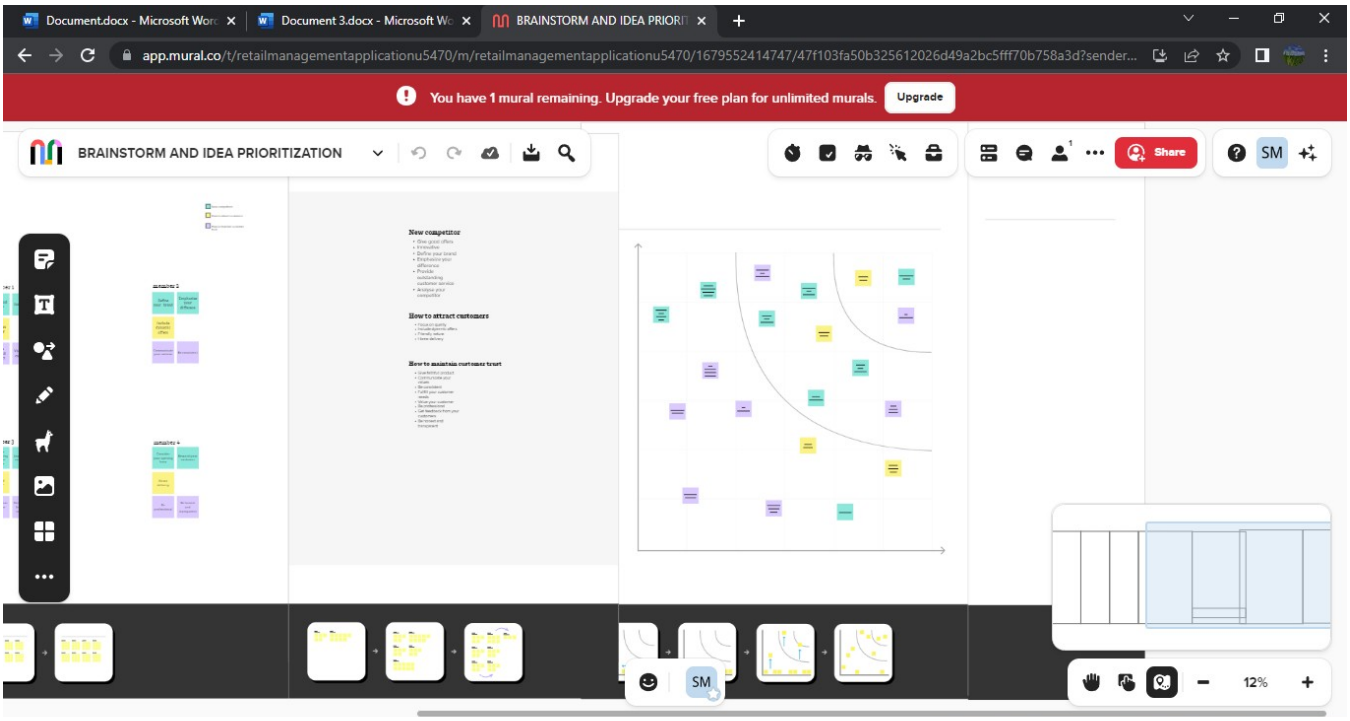


BRAINSTORMING AND IDEA PRIORITATION

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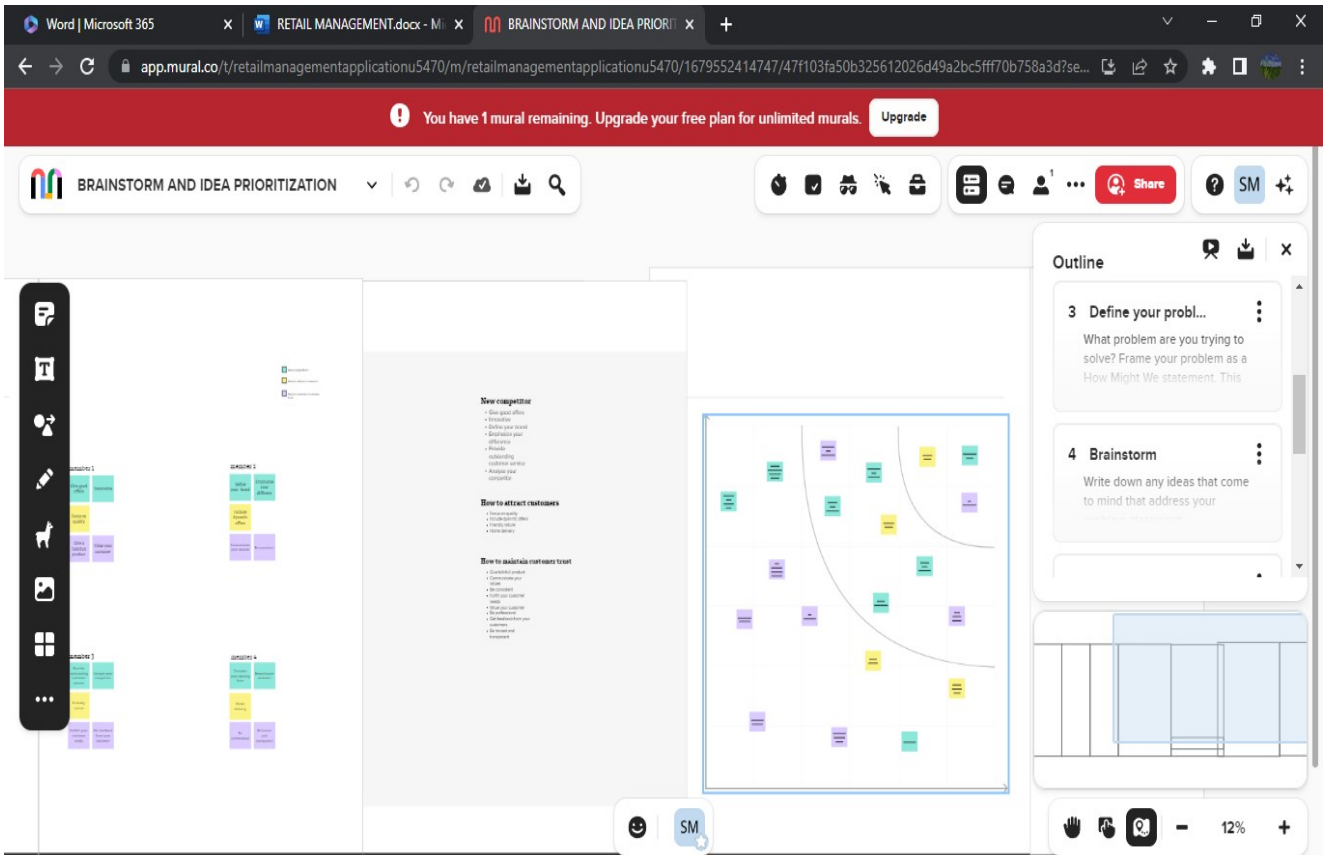
BRAINSTORM AND IDEA PRIORIT
app.mural.co/t/retailmanagementapplicationu5470/m/retailmanagementapplicationu5470/1679552414747/47f103fa50b325612026d49a2bc5fff70b758a3d?sender...
You have 1 mural remaining. Upgrade your free plan for unlimited murals.
Upgrade
BRAINSTORM AND IDEA PRIORITIZATION
Share
SM
New competitor
How to attract customers
How to maintain customer trust
12%



RESULT:

DATA MODEL

Object Name	Fields in the Object	
	Field label	Data type
Dispatch/Tracking	Dispatched	Checkbox
	sales order	Master details

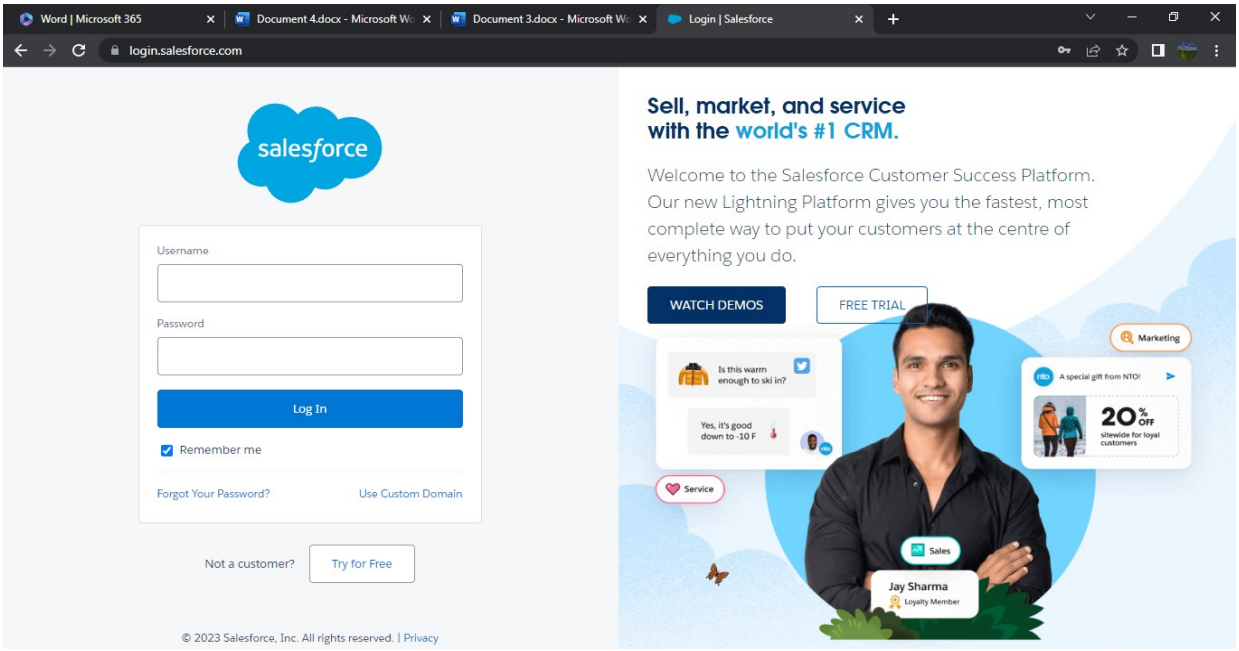
ACTIVITY AND SCREENSHOT

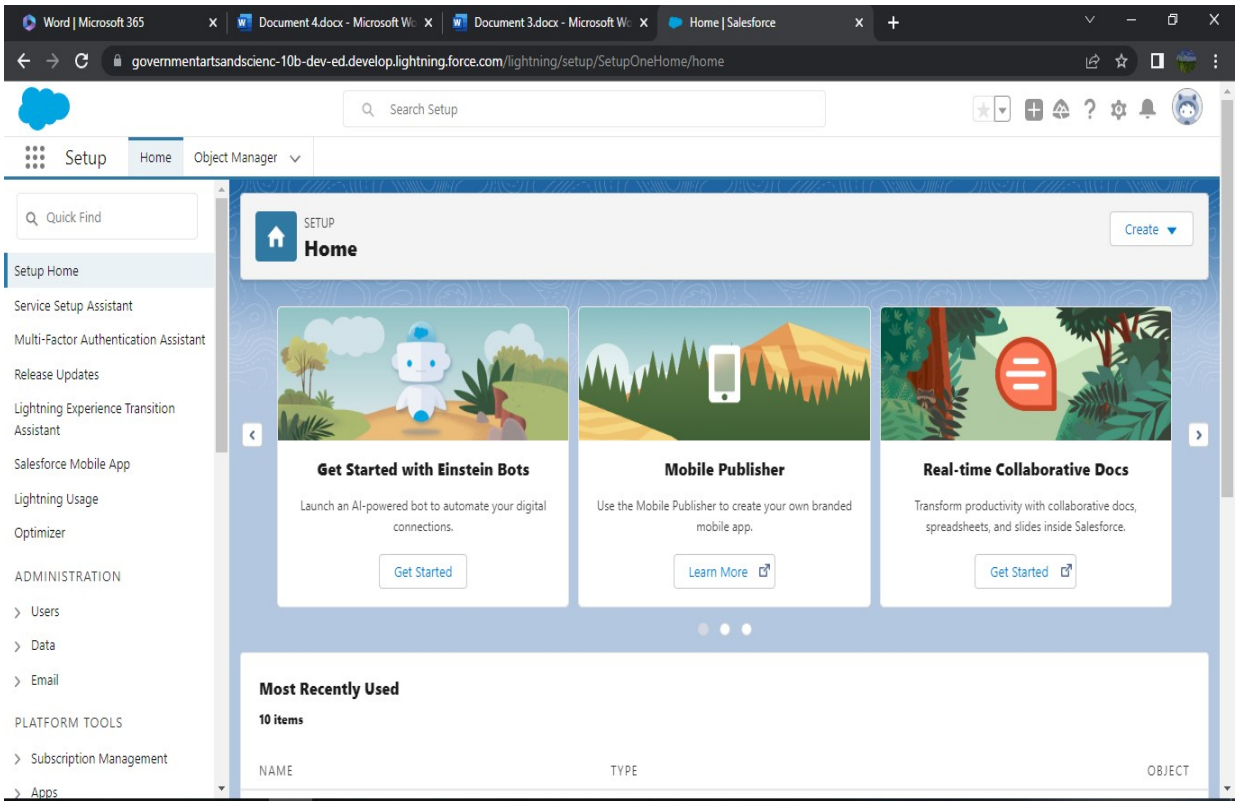
1.CREATING AN SALESFORCE ACCOUNT

we went to the website developers.salesforce.com and signed up by giving our details

LOGIN TO SALESFORCE ACCOUNT

We gave our username and password which we created in the last step and logged in the salesforce account.

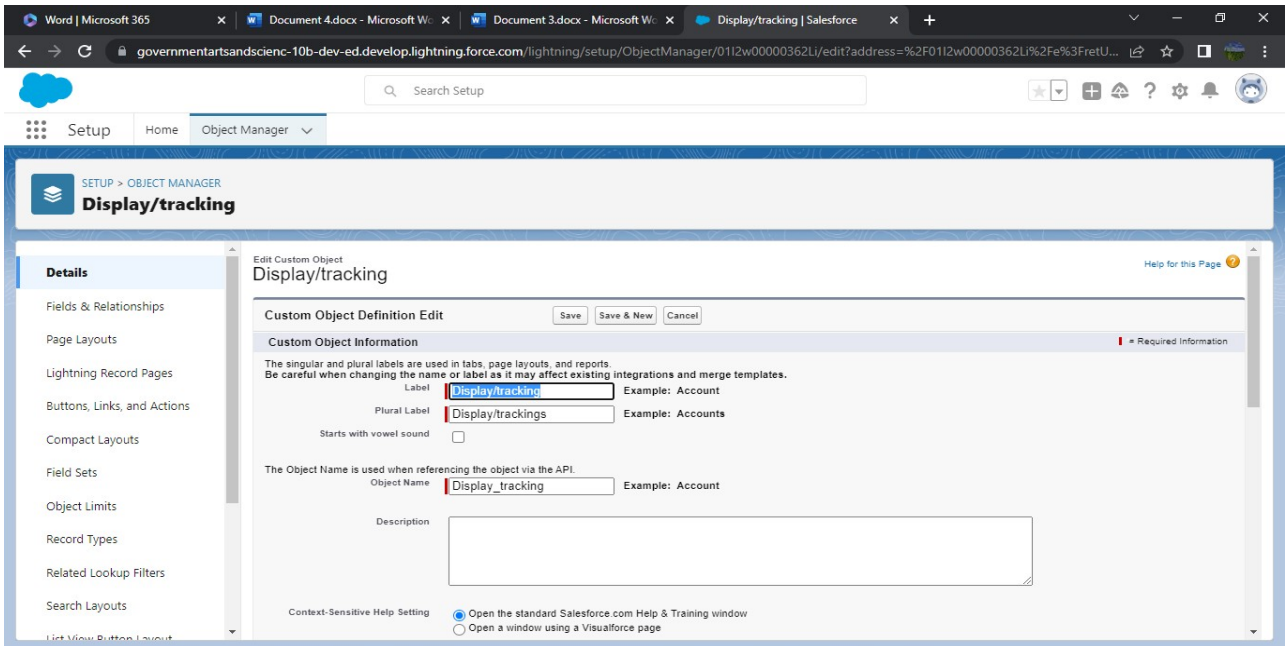




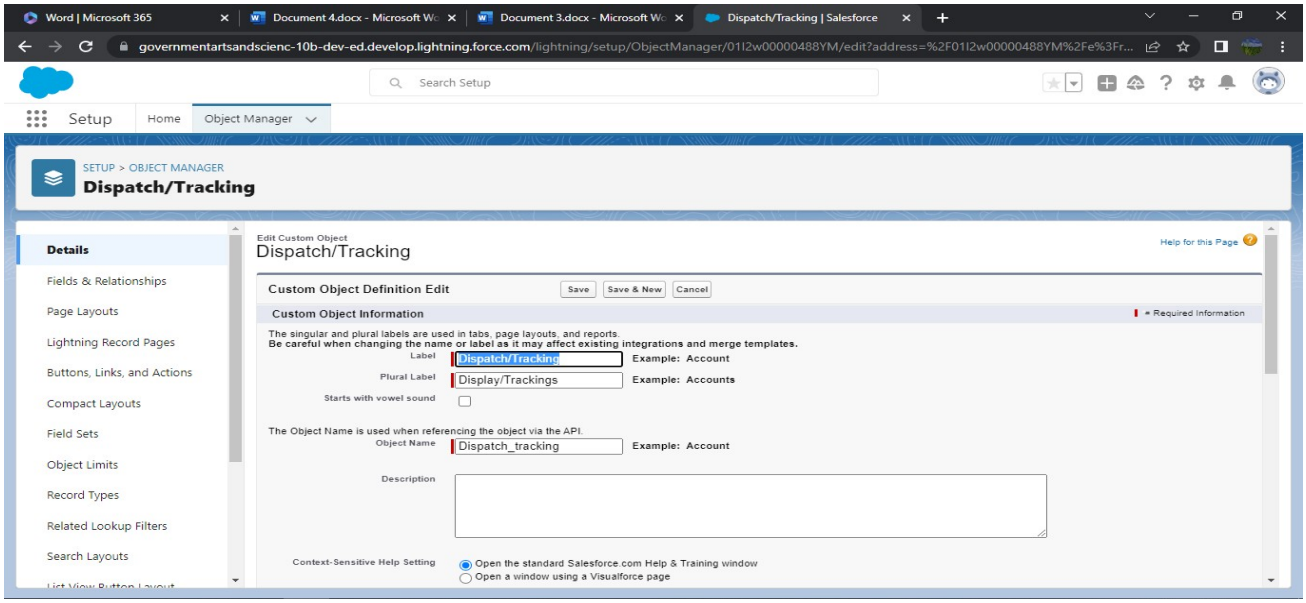
OBJECT CREATION

For this Sales app, we created five objects namely,

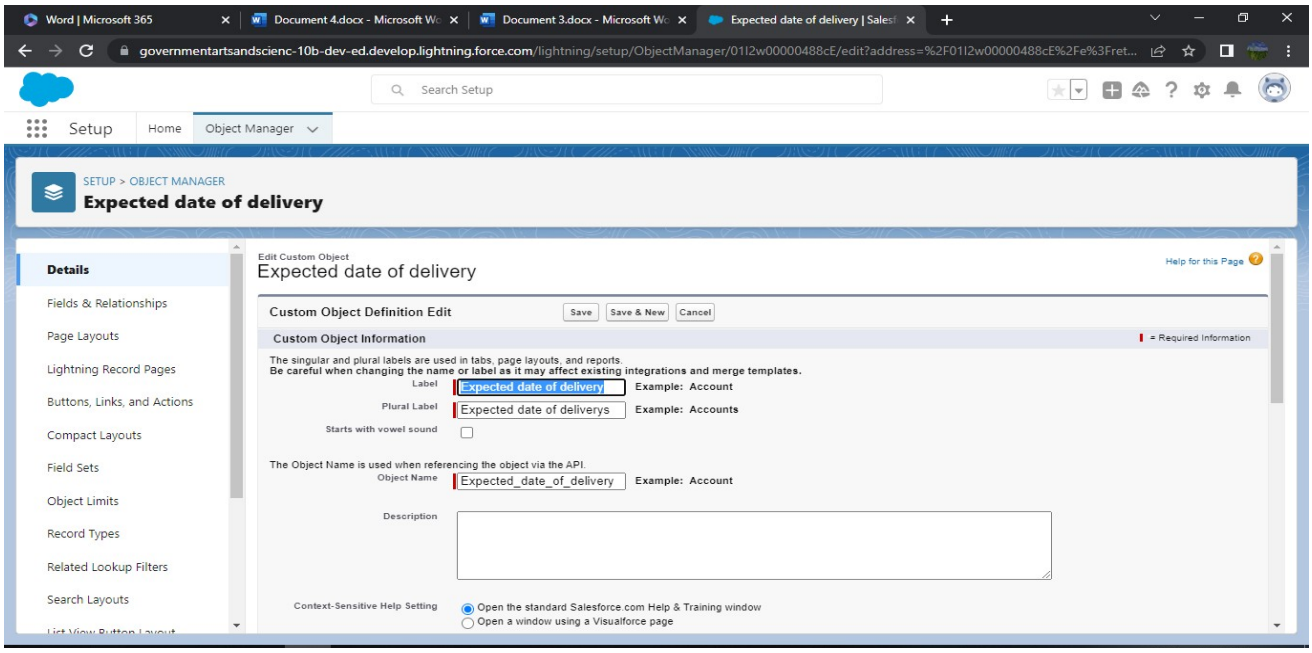
Display/tracking



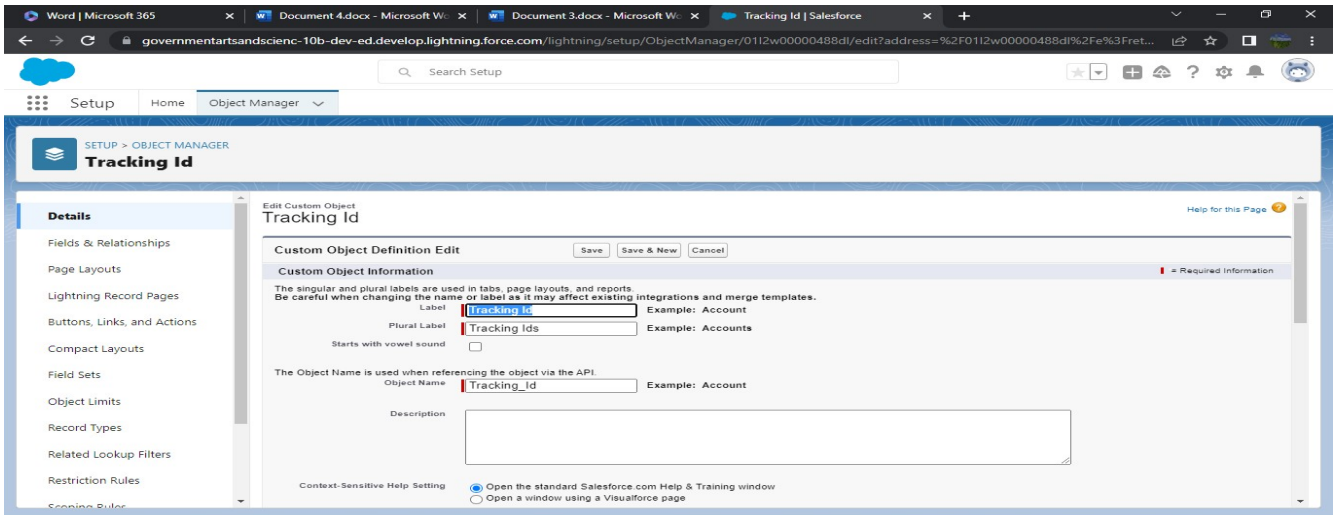
Dispatch/tracking



Expected date of delivery



Tracking Id


Word | Microsoft 365
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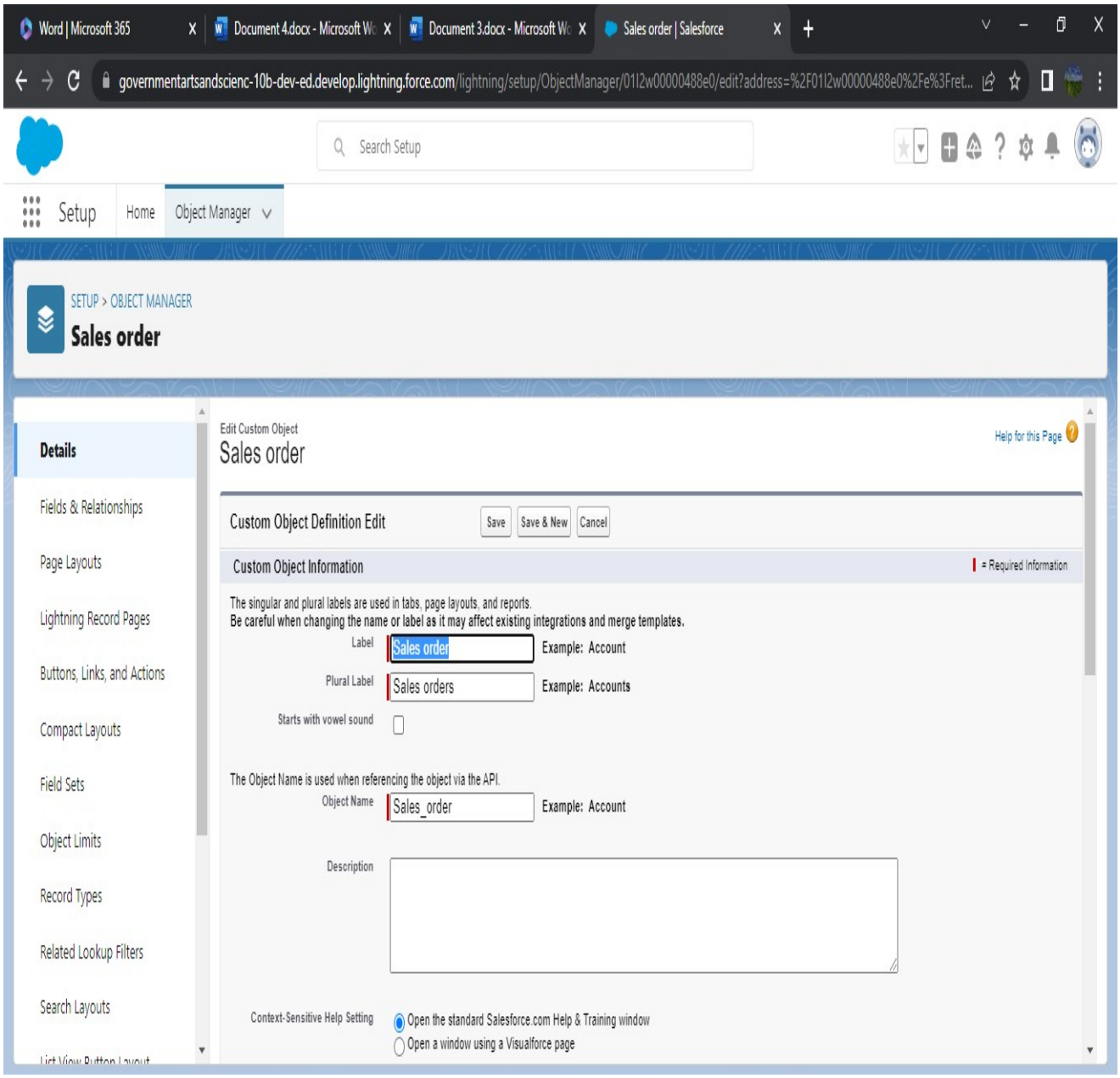
Tracking Id | Salesforce
governmentartsandscienc-10b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w00000488dI/edit?address=%2F01I2w00000488dI%2Fe%3Fret...
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Tracking Id
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Edit Custom Object
Tracking Id
Help for this Page
Custom Object Definition Edit
Save
Save & New
Cancel
Custom Object Information
= Required Information
The singular and plural labels are used in tabs, page layouts, and reports.
Be careful when changing the name or label as it may affect existing integrations and merge templates.
Label
Tracking Ic
Example: Account
Plural Label
Tracking Ids
Example: Accounts
Starts with vowel sound
The Object Name is used when referencing the object via the API.
Object Name
Tracking_Id
Example: Account
Description
Context-Sensitive Help Setting
Open the standard Salesforce.com Help & Training window
Open a window using a Visualforce page

Sales order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Sales order | Salesforce
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Search Setup
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Sales order
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Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
Edit Custom Object
Sales order
Help for this Page
Custom Object Definition Edit
Save
Save & New
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= Required Information
The singular and plural labels are used in tabs, page layouts, and reports.
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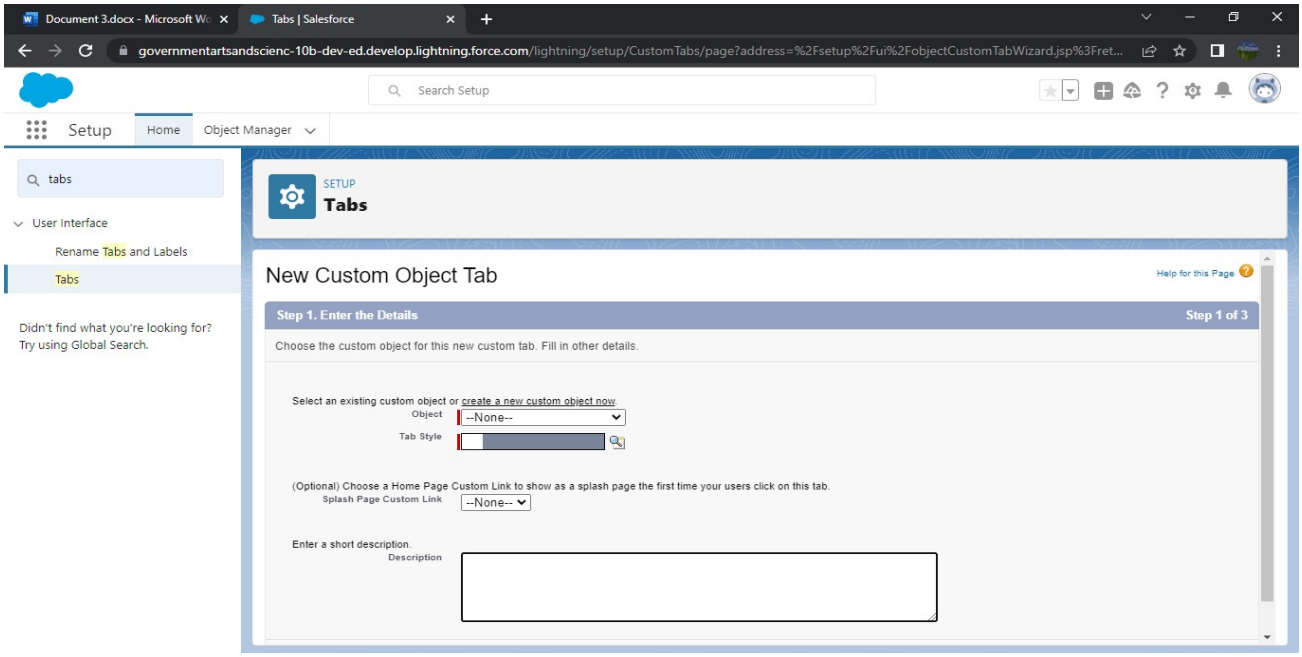
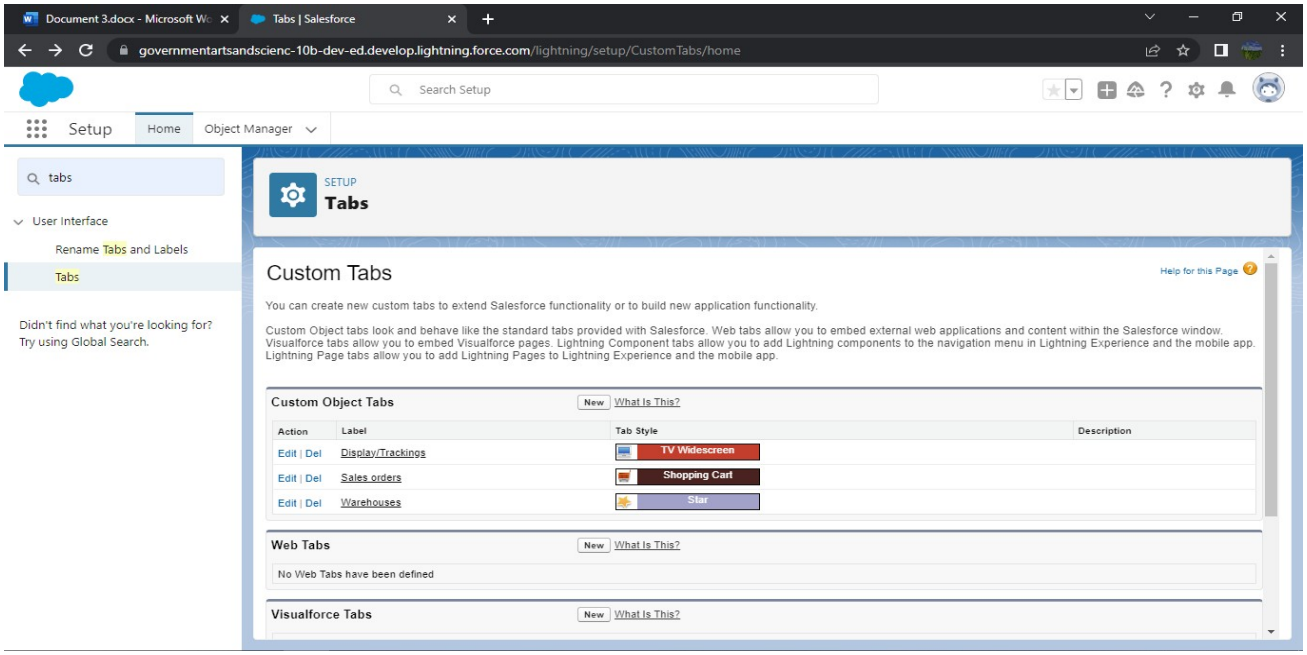
Label
Sales order
Example: Account
Plural Label
Sales orders
Example: Accounts
Starts with vowel sound
The Object Name is used when referencing the object via the API.
Object Name
Sales_order
Example: Account
Description
Context-Sensitive Help Setting
Open the standard Salesforce.com Help & Training window
Open a window using a Visualforce page

TAB CREATION

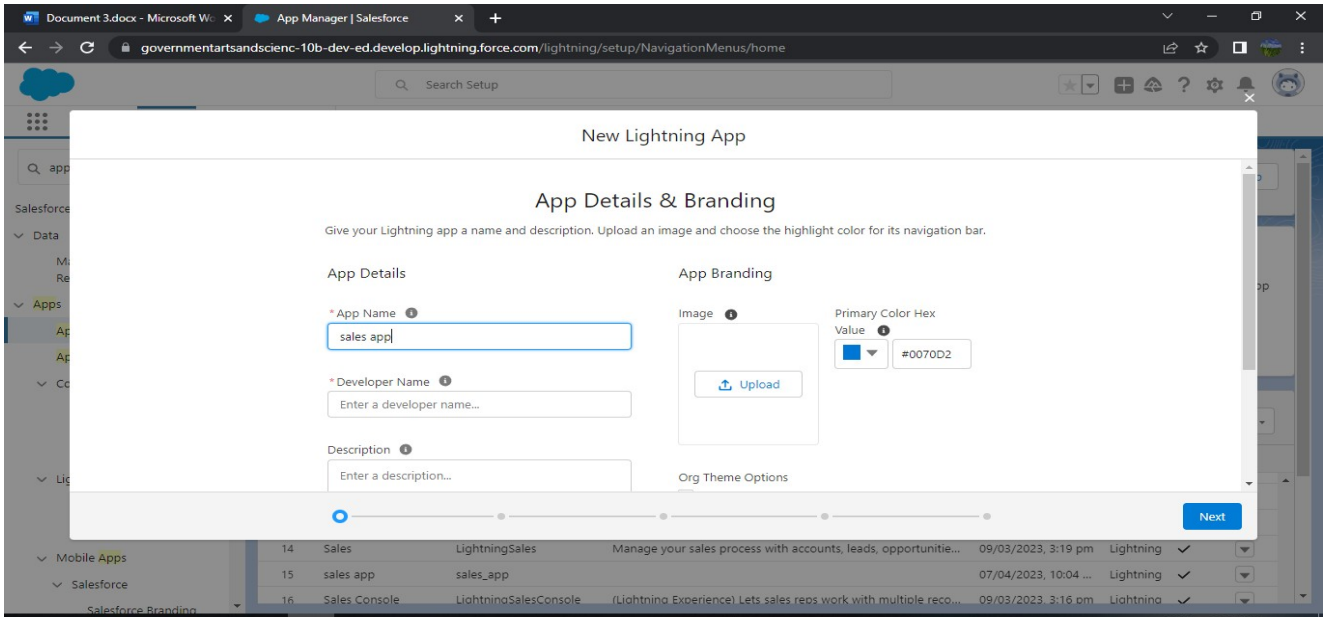
In the quick find box, we typed tabs and went inside it and clicked new and we gave the required details to create three tabs (Display/tracking, sales order, warehouse).

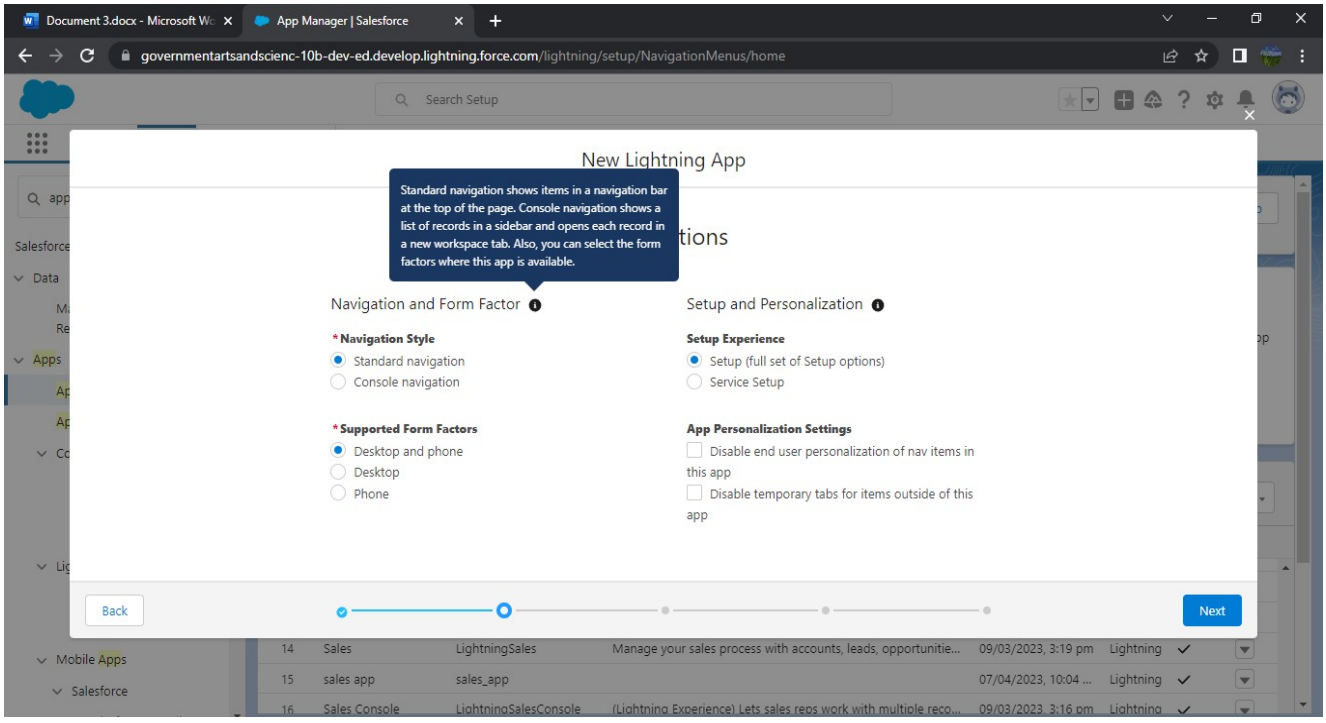


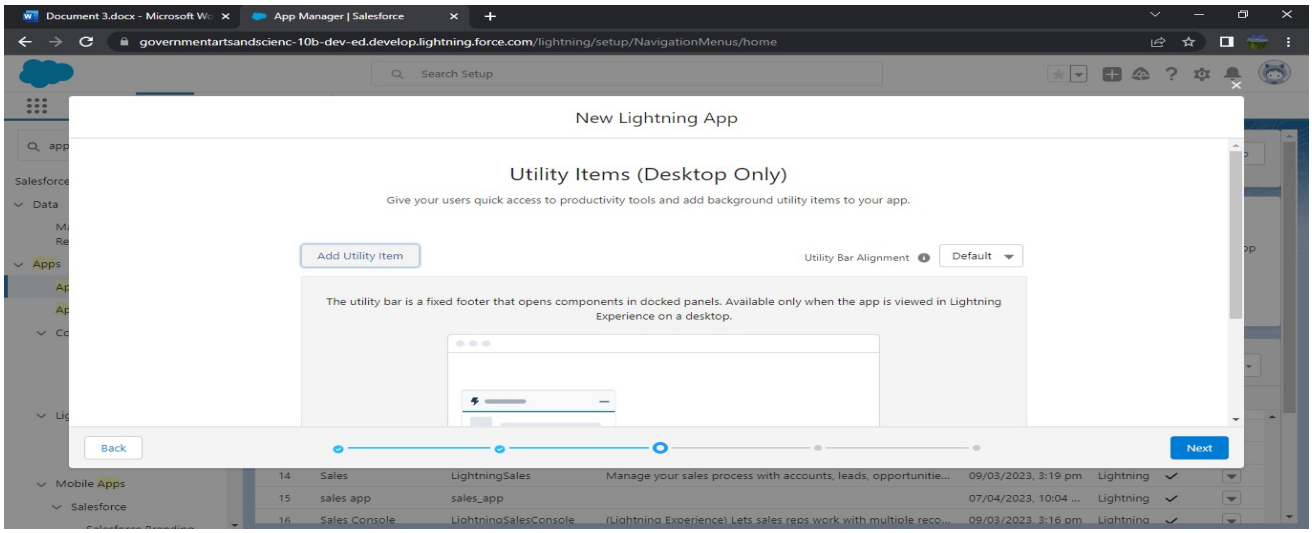


CREATING THE RETAIL MANAGEMENT APPLICATION

In the quick find box, we typed app manager and went inside it and new lightning app and created an event management application by giving the details.



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App Manager | Salesforce
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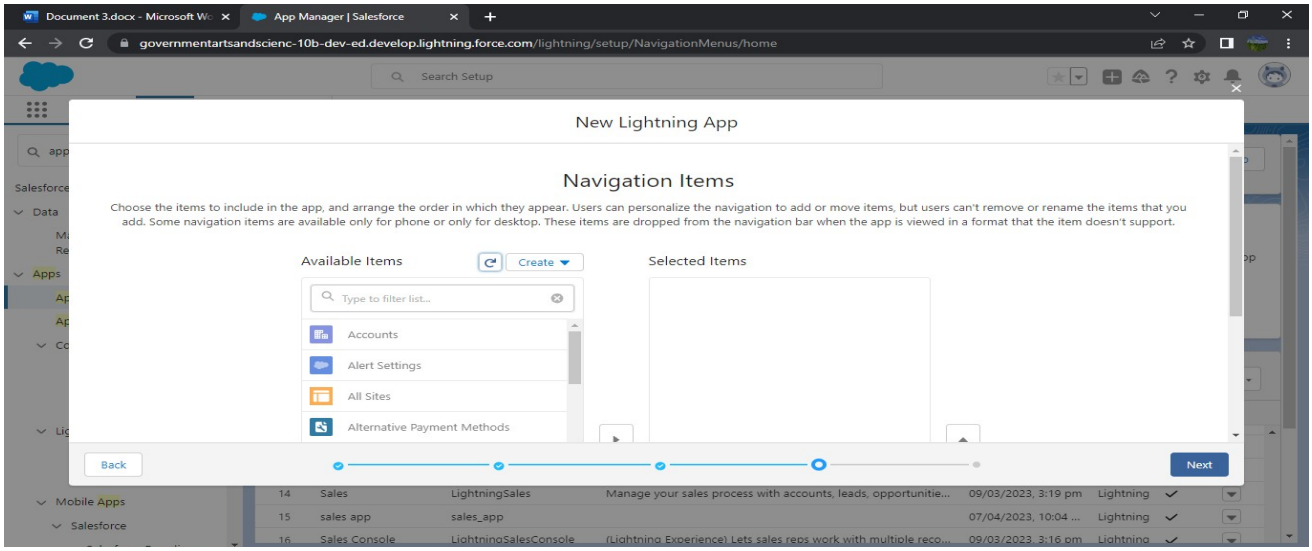
Search Setup
New Lightning App
Utility Items (Desktop Only)
Give your users quick access to productivity tools and add background utility items to your app.
Add Utility Item
Utility Bar Alignment
Default
The utility bar is a fixed footer that opens components in docked panels. Available only when the app is viewed in Lightning Experience on a desktop.
Back
Next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App Manager | Salesforce
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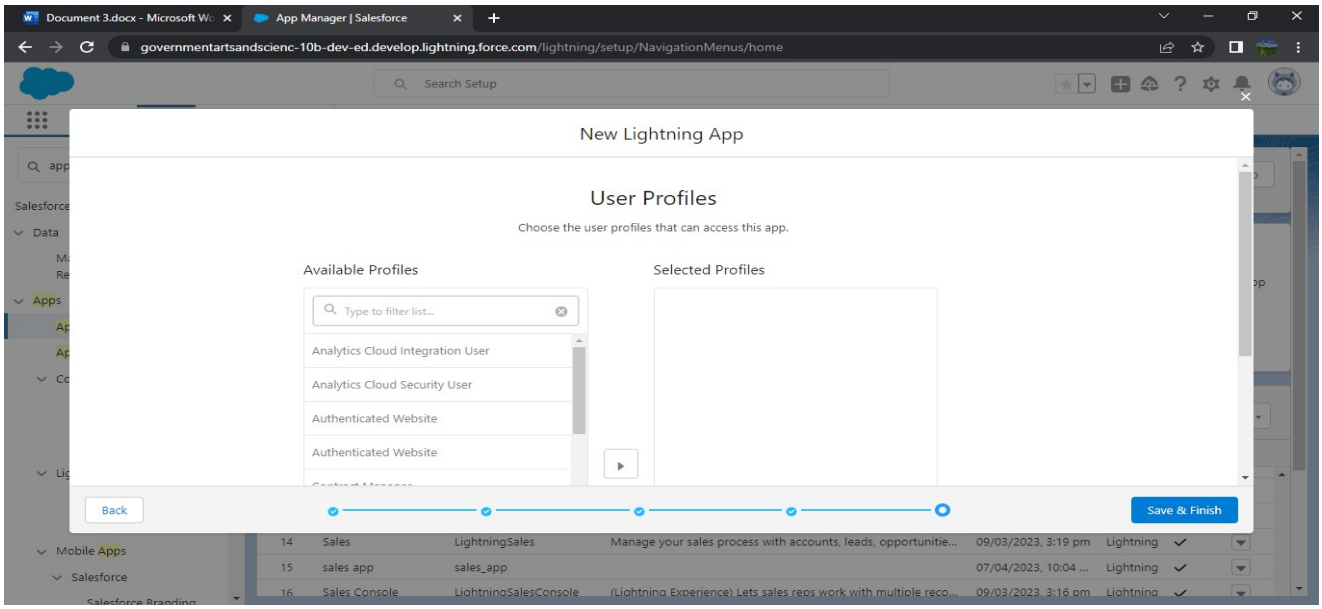
Search Setup
New Lightning App
Navigation Items
Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.
Available Items
Create
Selected Items
Type to filter list...
Accounts
Alert Settings
All Sites
Alternative Payment Methods
Back
Next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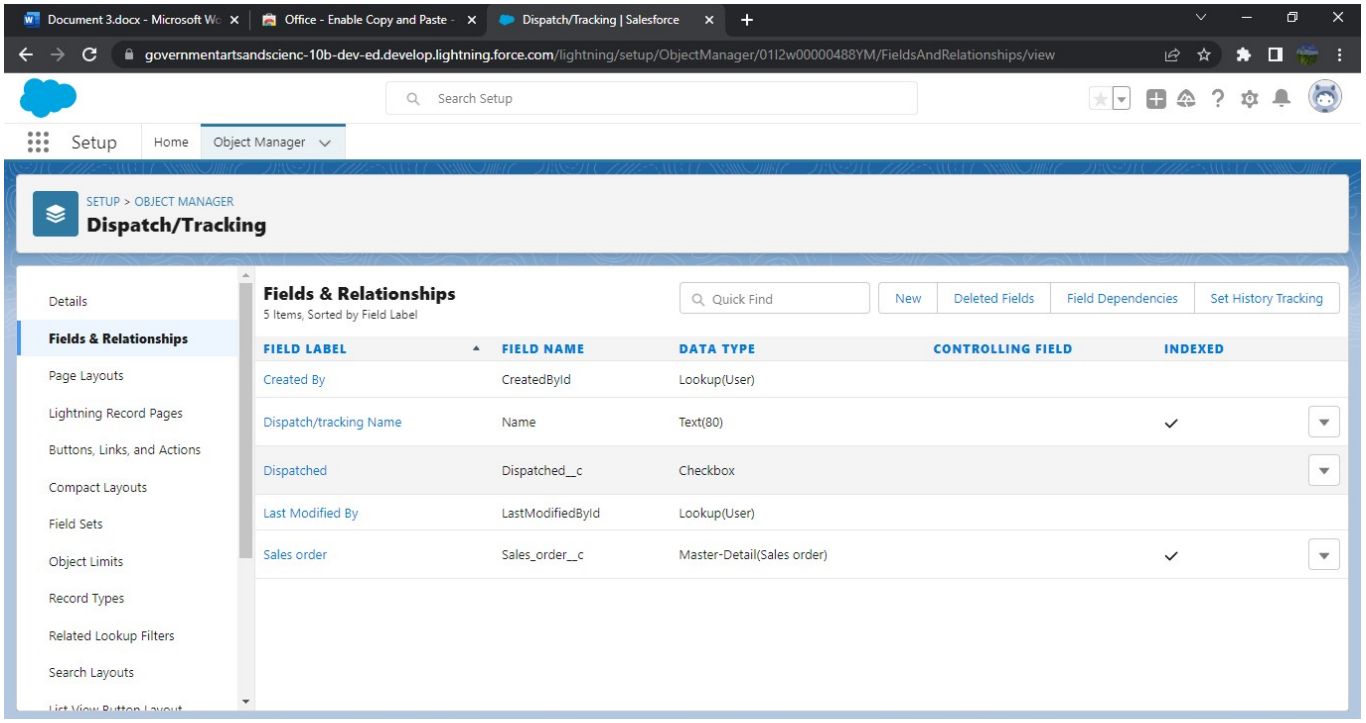
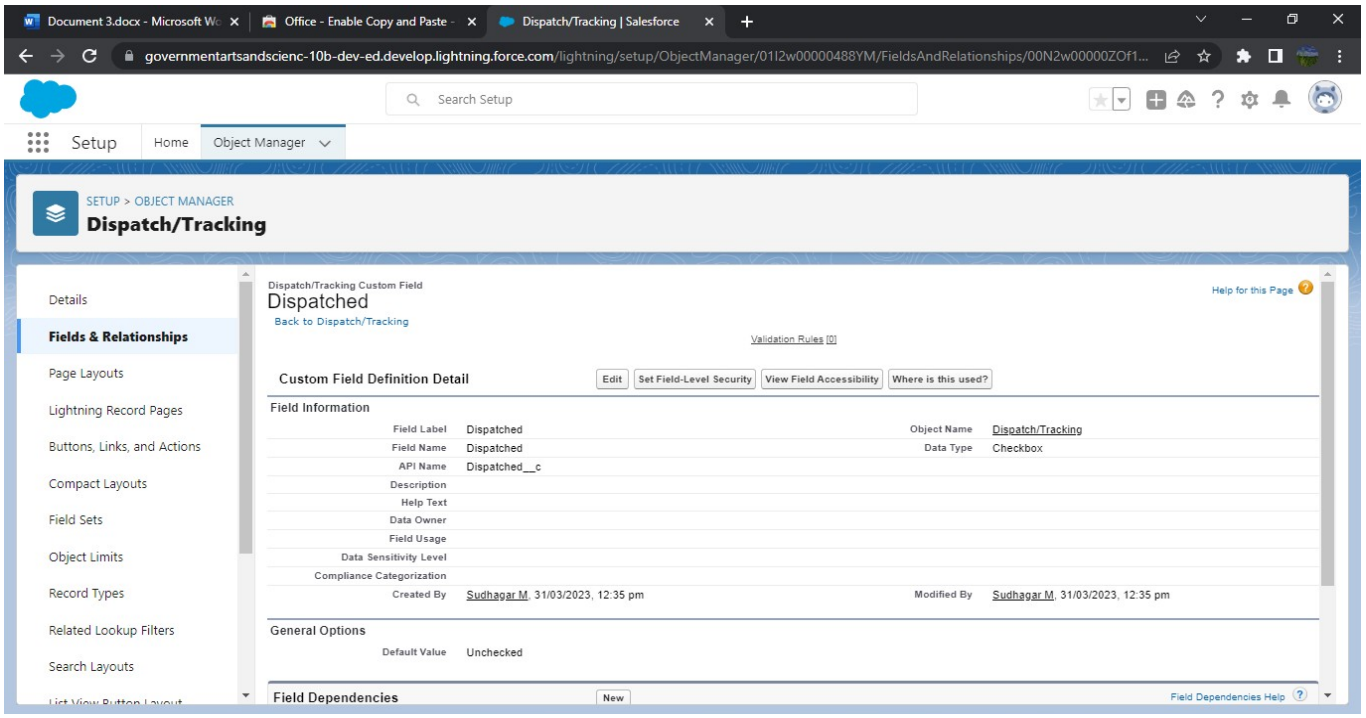
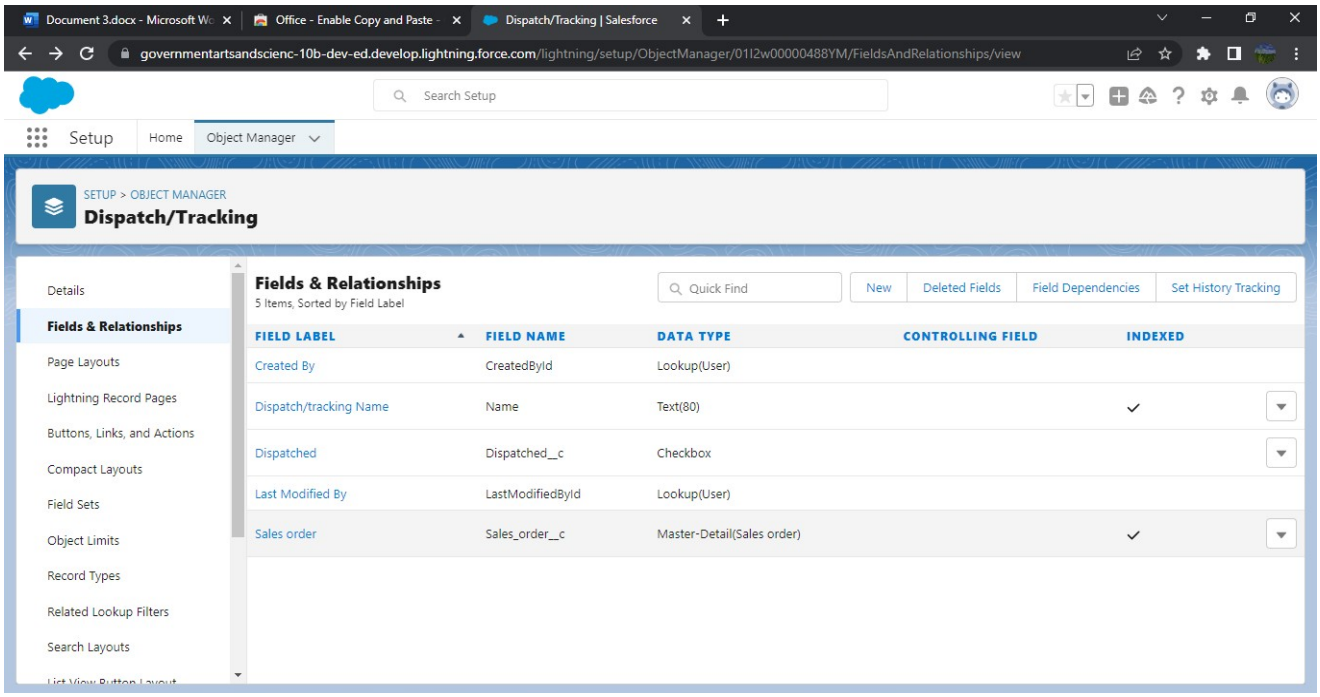
Search Setup
New Lightning App
User Profiles
Choose the user profiles that can access this app.
Available Profiles
Selected Profiles
Type to filter list...
Analytics Cloud Integration User
Analytics Cloud Security User
Authenticated Website
Authenticated Website
Back
Save & Finish
Salesforce
Data
Apps
Mobile Apps
Salesforce
14 Sales LightningSales Manage your sales process with accounts, leads, opportunitie... 09/03/2023, 3:19 pm Lightning
15 sales app sales_app 07/04/2023, 10:04 ... Lightning
16 Sales Console LightningSalesConsole (Lightning Experience) Lets sales reps work with multiple reco... 09/03/2023, 3:16 pm Lightning

FIELD AND RELATIONSHIP CREATION

In fields and relationship creation we created 1 field in the event management object.



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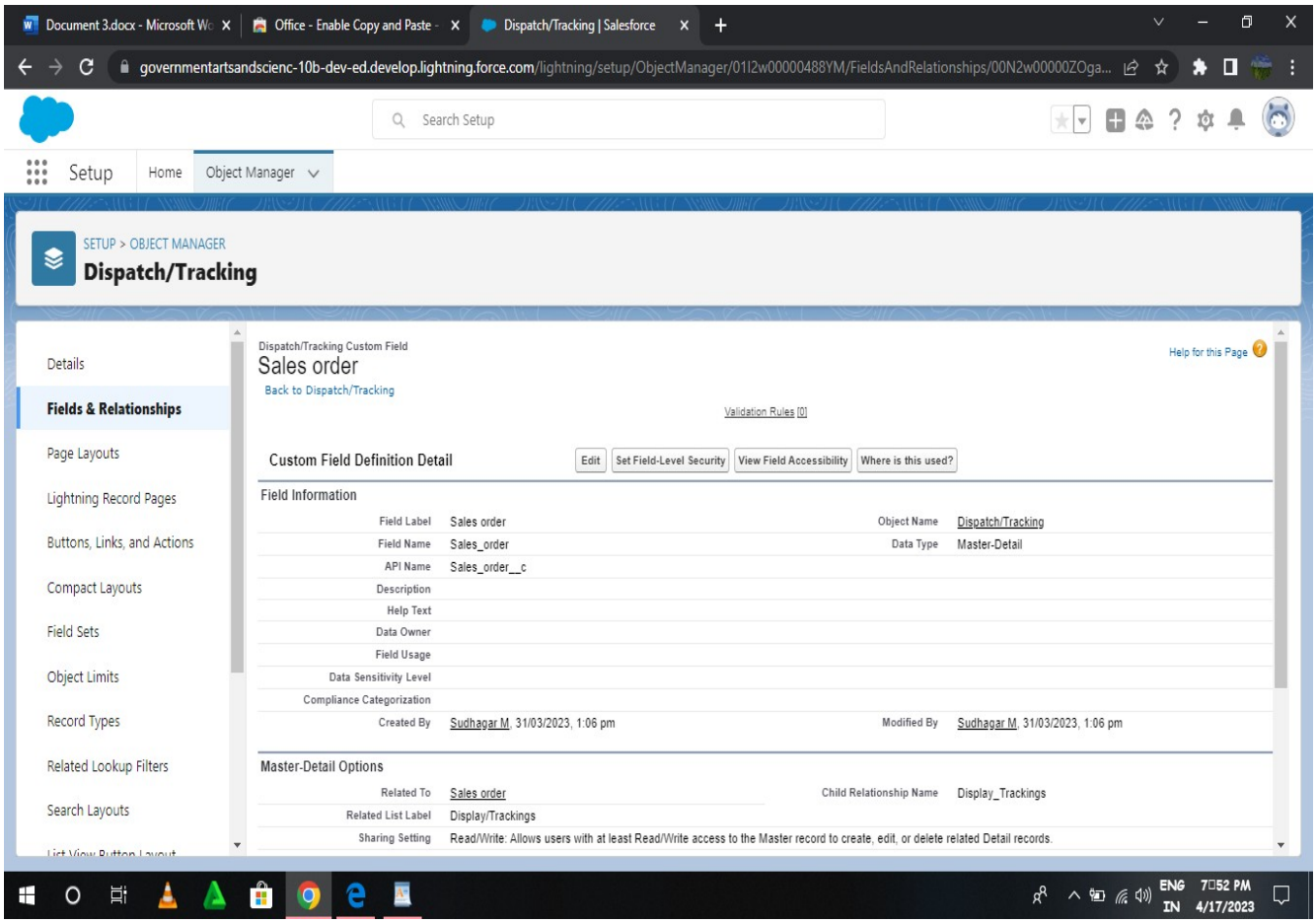
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
Fields & Relationships
5 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Created By
CreatedById
Lookup(User)
Dispatch/tracking Name
Name
Text(80)
Dispatched
Dispatched__c
Checkbox
Last Modified By
LastModifiedById
Lookup(User)
Sales order
Sales_order__c
Master-Detail(Sales order)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Object Limits
Record Types
Related Lookup Filters
Search Layouts
Dispatch/Tracking Custom Field
Sales order
Back to Dispatch/Tracking
Help for this Page
Validation Rules [0]
Custom Field Definition Detail
Edit
Set Field-Level Security
View Field Accessibility
Where is this used?
Field Information
Field Label
Sales order
Object Name
Dispatch/Tracking
Field Name
Sales_order
Data Type
Master-Detail
API Name
Sales_order__c
Description
Help Text
Data Owner
Field Usage
Data Sensitivity Level
Compliance Categorization
Created By
Sudhagar M, 31/03/2023, 1:06 pm
Modified By
Sudhagar M, 31/03/2023, 1:06 pm
Master-Detail Options
Related To
Sales order
Child Relationship Name
Display_Trackings
Related List Label
Display/Trackings
Sharing Setting
Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.
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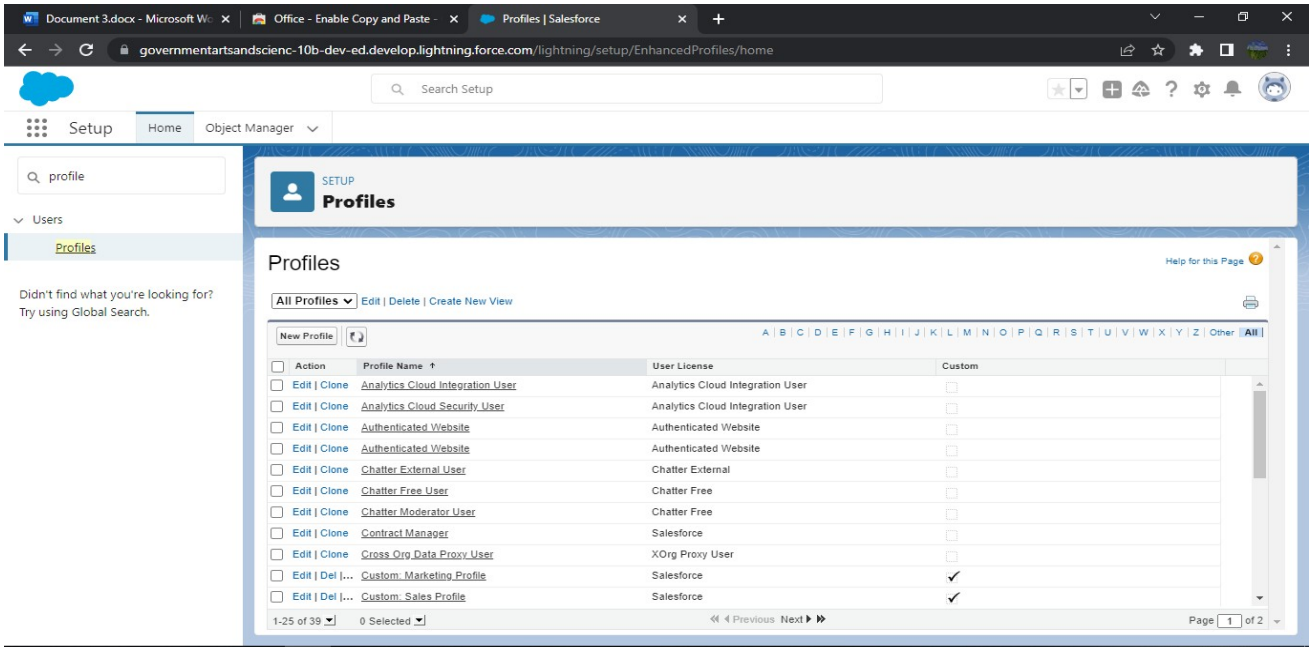
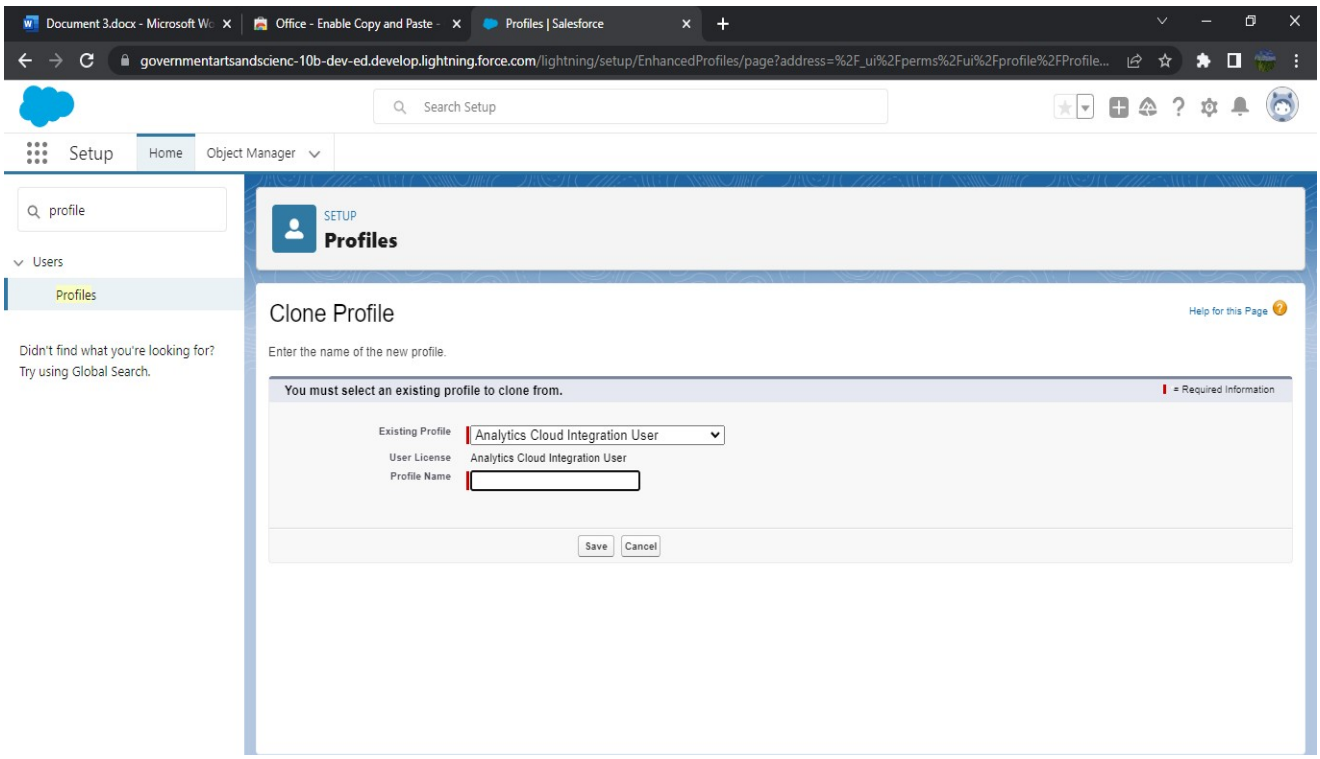
PROFILE CREATION

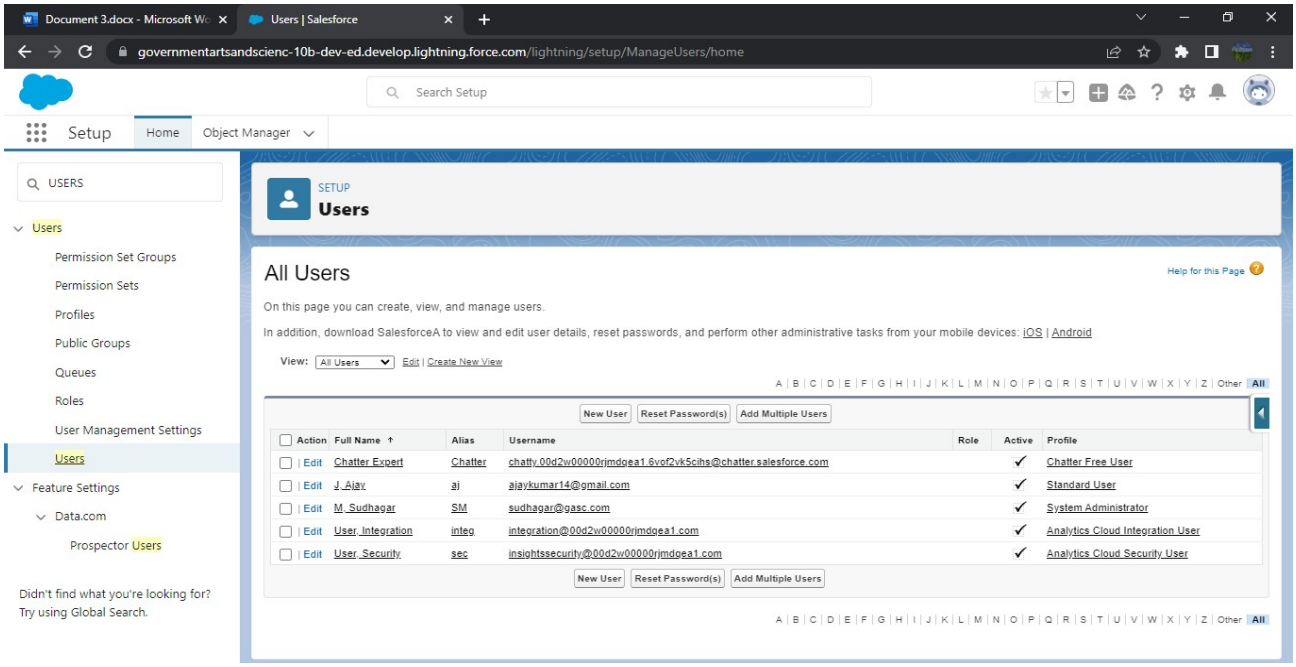
We created a profile. A profile can be assigned to many users, but the user can be assigned a single profile at a time.

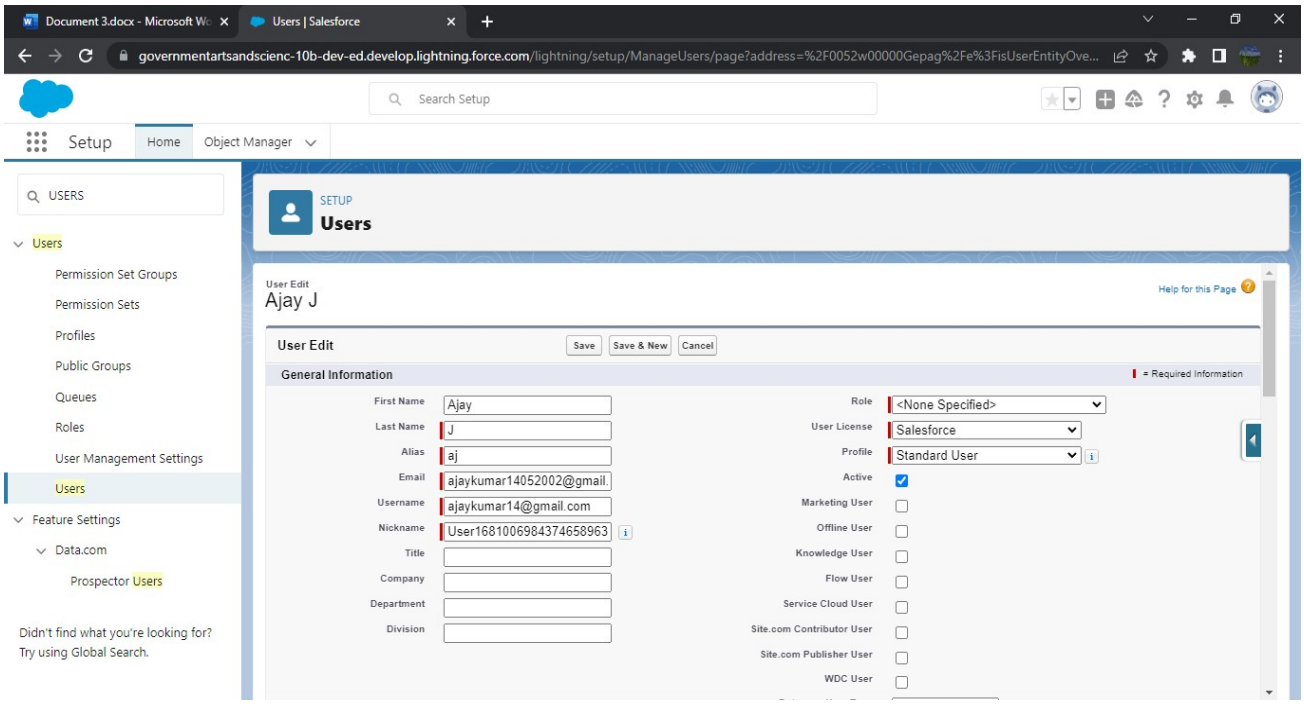




CREATION OF USERS

The user account identifies the user, and the user account settings determine what features and records the user can access.





TRAILHEAD PROFILE PUBLIC URL

TEAM LEADER : M.SUDHAGAR ; https://trailblazer.me/id/sudhm31

TEAM MEMBER 1: J.AJAY

TEAM MEMBER 2: S.ESAKKILAKSHMI

TEAM MEMBER 3: M.VANITHA

ADVANTAGES

- Requires less capital.
- More profit margin than wholesalers.
- Better customer relations.
- Credit facility.
- Make it easy to pay.

DISADVANTAGES

- Requires more marketing costs.
- Good selling skills are required.
- High competition.
- No benefit of bulk buying.
- Lack of initiative.

APPLICATION

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.

CONCLUSION

We have explored the meaning of the terms retailing, marketing and marketing communications. We have also considered the importance of the marketing mix and identified the different communication tools that a retailer might use to interact and communicate with their target customers. You have been introduced to a few theoretical concepts and ideas, which have been illustrated using real world examples and cases in retailing. You have been introduced to some of the key areas of marketing communications – message, the media and the communication tools.

SCOPES

Retail management has become one of the fastest-growing occupations in the industry as the economy has grown significantly. The retail industry in India is the most appealing and fastest growing in the world, demanding an increase in competent expertise in this discipline.