

RETAIL MANAGEMENT APPLICATION USING SALESFORCE

1 INTRODUCTION

1.1 overview:

Retail management refers to the process of helping customers including tracking orders, processing payments, and Salesforce is the ultimate sales automation platform for retailers.

Retailers can use Salesforce to manage customer relationships, track inventory, and automate sales processes. The small business we'll be discussing uses Salesforce to manage customer relationships, track inventory, and automate sales processes. managing inventory levels. This can help field sales teams ensure that orders are fulfilled quickly and accurately and that find products in your store. It includes everything from increasing your customer pool to how products d how you fulfill a customer's needs. A good store manager helps customers leave the store with a smile.

Salesforce can be used to manage orders from retail stores and distributors, inventory levels are maintain.

Retailing, the selling of merchandise and certain services to consumers. It ordinarily involves the selling of individual units or small lots to large numbers of customers by a business set up for that specific purpose.

Emphasize the name and address of the business. Tell the reader how it started and what products or services it offers. Stress the benefits of using the products or services. If there is an opening event, invite the recipient to attend.

Retail management is the process of promoting sales and customer satisfaction by gaining a better understanding of the consumers of goods and services produced by the company. Retail managers are responsible for every aspect of day-to-day supervision of retail outlets, including sales, staff, stock resource management.

Retail management skills are the abilities that help managers sell products to consumers, oversee a sales team and work in an environment based on customer service. Retail managers typically guide, train and support team members while liaising between store administration and team members

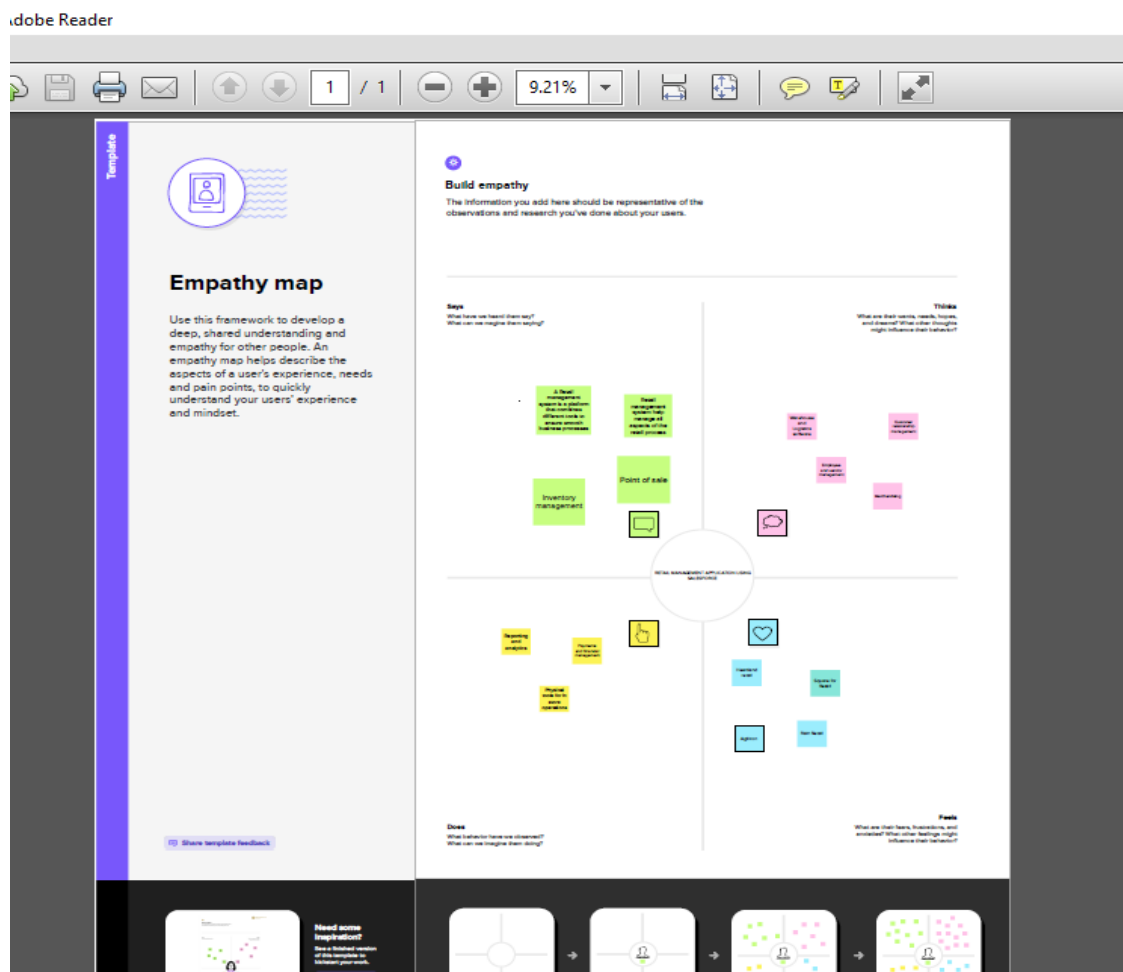
Salesforce Consumer Goods Cloud helps to optimize store visits, create collaborative relationships across the entire value chain, and accelerate in-store productivity. Moreover, it will take you a step ahead of your competitors by leveraging artificial intelligence to improve audit accuracy and skyrocket your business growth.

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.

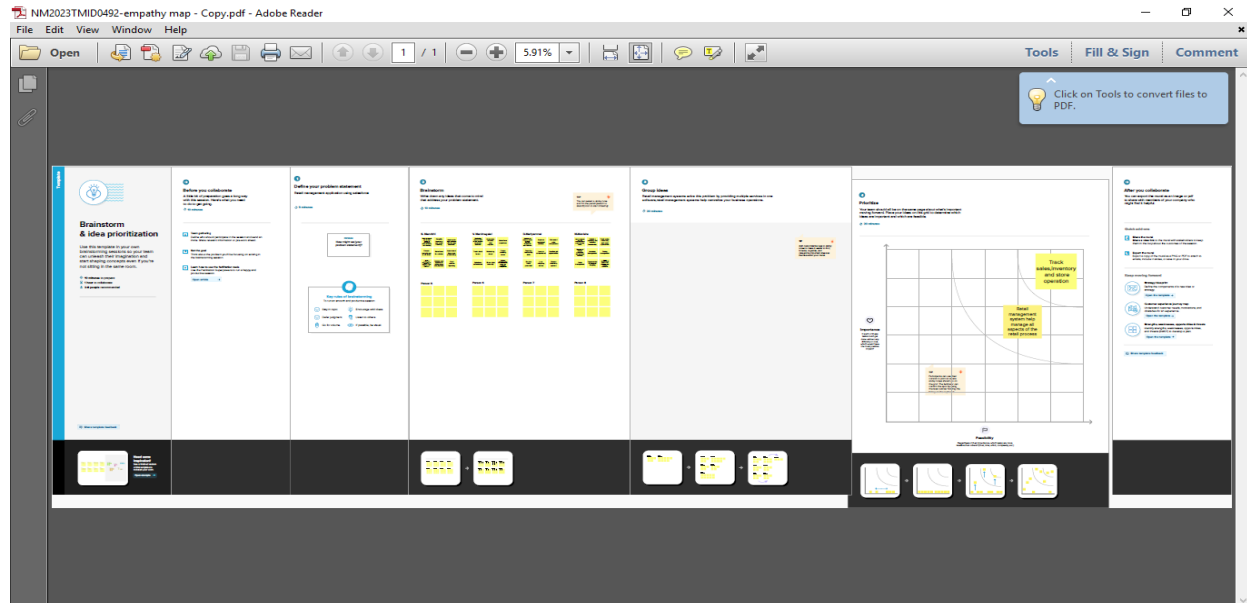
A retail management system (RMS) is a platform that combines several modules to aid in the day-to-day operation of a retail store or chain, such as managing and buying inventory, checking out customers, scheduling employee shifts, keeping track of finances,

2 PROBLEM DEFINITION & DESIGN THINKING:

2.1 Empathy Map



2.2 Ideation & Brainstorming map



3 RESULT

3.1 Data Model:

Object Name	Field in the Object	
Display/Tracking	Field Label	Data Type
	Created by	Lookup(user)
	d Name	Text(80)
	dispatched	Checkbox
	Last modified by	Lookup(user)
	Owner	Lookup(user,group)
Warehouse	Field Label	Data Type
	Created by	Lookup(user)
	Last modified by	Lookup(user)
	Owner	Lookup(user,group)
	Warehouse Name	Text(80)
Account	FieldLabel	Data Type
	Account name	Text(80)
	Created by	Lookup(user)
	Last modified by	Lookup(user)
	owner	Lookup(user,group)
Accounts	Field Label	Data Type
	Account name	Text(80)
	Created by	Lookup(user)
	Last modified by	Lookup(user)
	OwnerText	Lookup(user,group)

3.2 Activity and Screenshot

Milestone 1: Creating developer org.

Activity 1: Creating Developer Account

The screenshot shows the Salesforce Developer Edition Signup page. The browser's address bar displays 'developer.salesforce.com/signup'. The page features a blue sidebar on the left with the heading 'Build enterprise-quality apps fast to bring your ideas to life' and a bulleted list of features. The main content area on the right contains a form titled 'Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.' The form includes fields for First Name, Last Name, Email, Role (a dropdown menu), Company, Country/Region (a dropdown menu), Postal Code, and Username. The Username field has a note below it: 'Your username must be in the form of an email address (it does not have to be real). It'.

Build enterprise-quality apps fast to bring your ideas to life

- Build apps fast with drag and drop tools
- Customize your data model with clicks
- Go further with Apex code
- Integrate with anything using powerful APIs
- Stay protected with enterprise-grade security
- Customize UI with clicks or any leading-edge web framework

Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.

First Name*
manvizhi

Last Name*
s

Email*
manvizhi.shankar16@gmail.com

Role*
Developer

Company*
DR,M.G.R.Govt.Arts and science college for women

Country/Region*
India

Postal Code*
605 602

Username*
jane@company.sandbox

Your username must be in the form of an email address (it does not have to be real). It

Milestone 2: Objects

Activity 1: Creation of objects Dispatch/Tracking

Display/tracking | Salesforce x Developer Edition Signup | Sales | +

dmgrartsandsciencecollege8-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/012w000003oXKD/Details/view

Gmail YouTube Maps

Search Setup

Setup Home Object Manager

Display/tracking

Details Edit Delete

Description

API Name	Display_tracking__c	Enable Reports	✓
Custom	✓	Track Activities	
Singular Label	Display/tracking	Track Field History	
Plural Label	Display/trackings	Deployment Status	Deployed
		Help Settings	Standard salesforce.com Help Window

Flow Trainers

https://dmgrartsandsciencecollege8-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/012w000003oXKD/Details/view

Activity 2: Fields available on Dispatch/Tracking

Display/tracking | Salesforce x Developer Edition Signup | Sales | +

dmgrartsandsciencecollege8-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/012w000003oXKD/Details/view

Gmail YouTube Maps

Search Setup

Setup Home Object Manager

Display/tracking

Details Edit Delete

Description

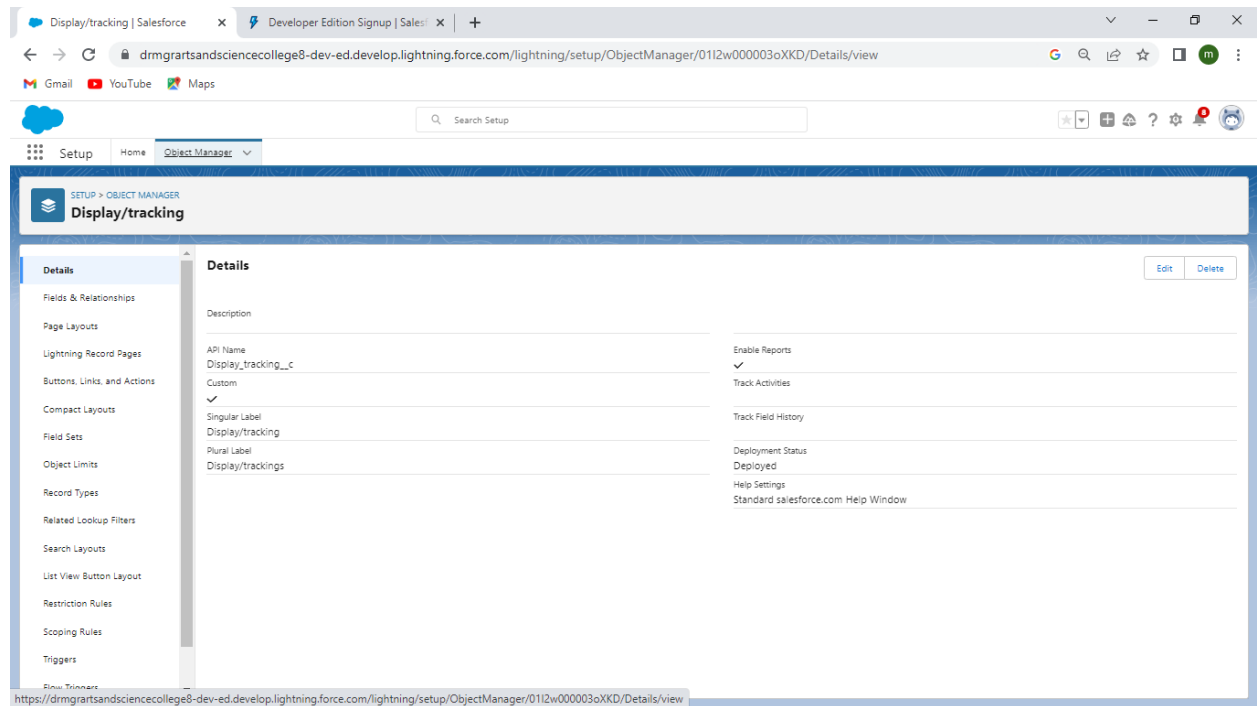
API Name	Display_tracking__c	Enable Reports	✓
Custom	✓	Track Activities	
Singular Label	Display/tracking	Track Field History	
Plural Label	Display/trackings	Deployment Status	Deployed
		Help Settings	Standard salesforce.com Help Window

Flow Trainers

https://dmgrartsandsciencecollege8-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/012w000003oXKD/Details/view

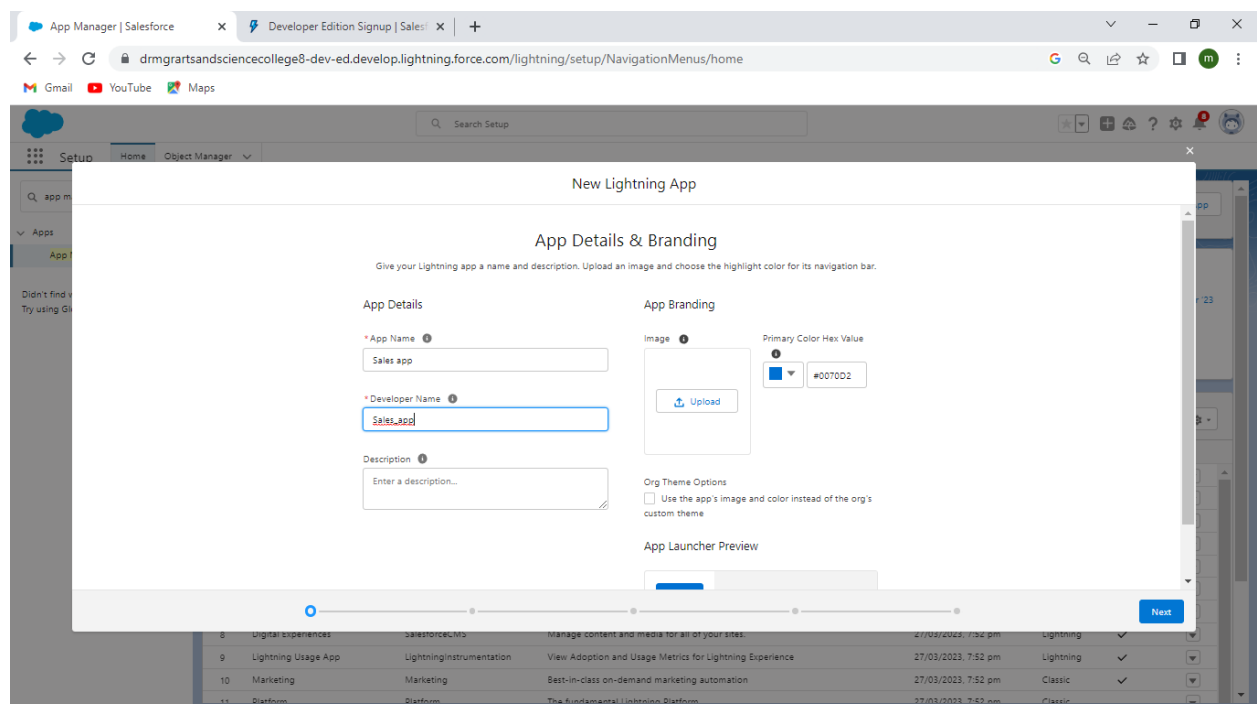
Milestone 3 : Relation between objects

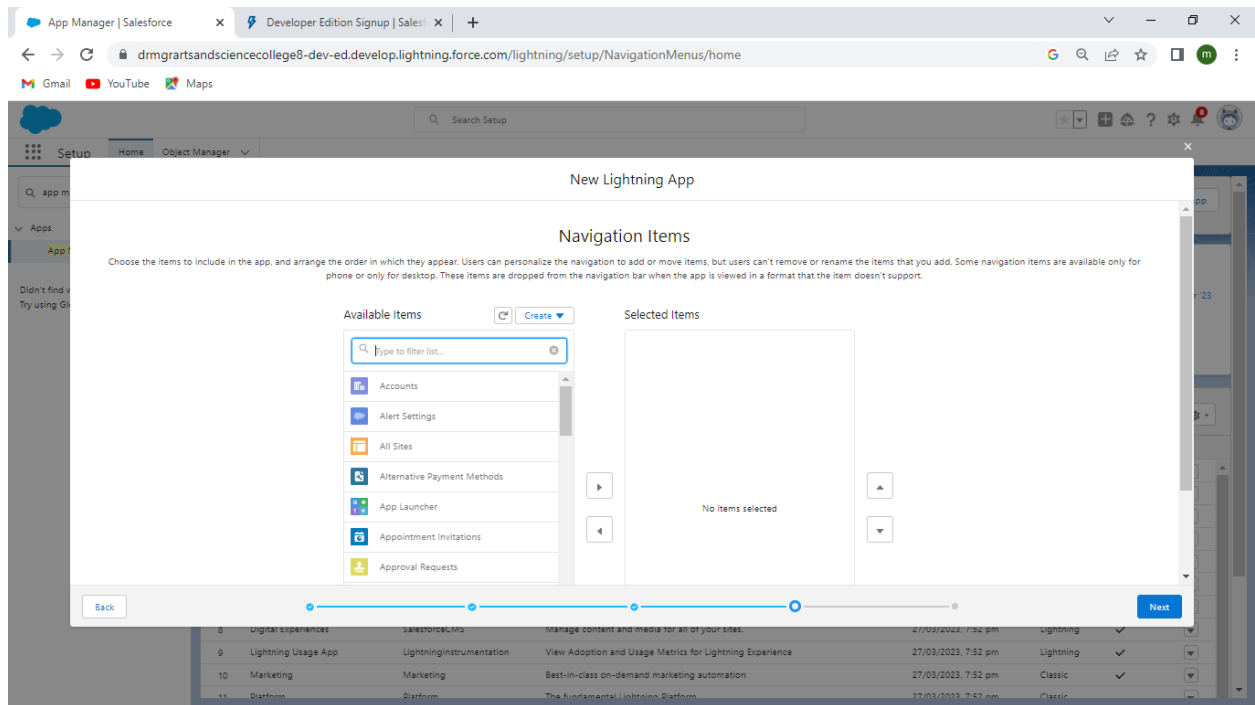
Activity 1: Creation of relationship between objects



Milestone 4 :Application

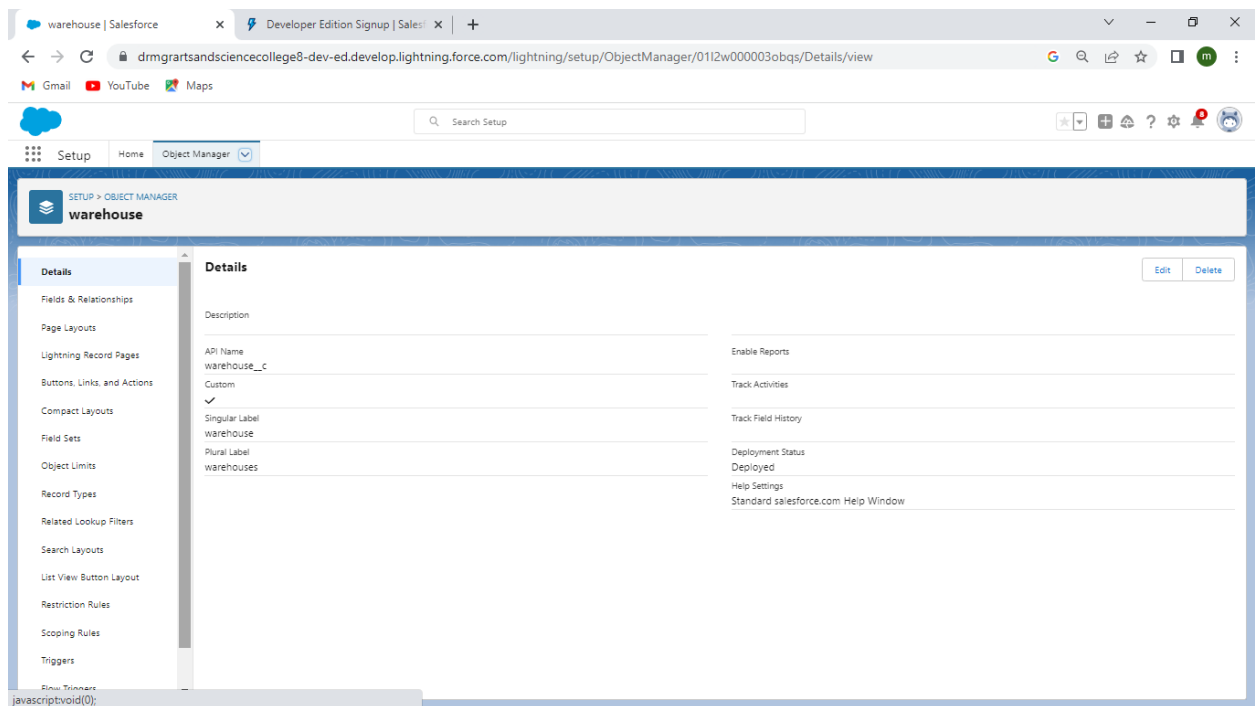
Activity 1: Creation of application





Milestone 5 : Layouts

Activity 1: Creation of custom Tabs



Milestone 6: Users

Activity 1 : Creation of users

The screenshot shows the Salesforce 'Users' setup page for a user named 'Manvizhi S'. The page is divided into two main sections: 'User Detail' and 'User License'. The 'User Detail' section contains a table of user information, including Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Delegated Approver, Manager, Federation ID, App Registration, and Security Key. The 'User License' section contains a table of user licenses, including User License, Profile, Active, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Push Registrations, Data.com User Type, Accessibility Mode (Classic Only), Debug Mode, High-Contrast Palette on Charts, Load Lightning Pages While Scrolling, Send Apex Warning Emails, Salesforce CRM Content User, and Receive Salesforce CRM Content Email Alerts.

User Detail	
Name	Manvizhi S
Alias	MS
Email	manvizhi.shankar19@gmail.com
Username	manvizhi@dmgr.com
Nickname	User10796290710793283578
Title	
Company	Dr.MGR arts and science collage for women
Department	
Division	
Address	IN
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Locale	English (India)
Language	English
Delegated Approver	
Manager	
Receive Approval Request Emails	Only if I am an approver
Federation ID	
App Registration: One-Time Password Authenticator	[Connect]
App Registration: Salesforce Authenticator	[Connect]
Security Key (U2F or WebAuthn)	[Key]
Lightning Login	[Enroll]

User License	
User License	Salesforce
Profile	System Administrator
Active	<input checked="" type="checkbox"/>
Marketing User	<input checked="" type="checkbox"/>
Offline User	<input checked="" type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input checked="" type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>
Site.com Publisher User	<input type="checkbox"/>
WDC User	<input type="checkbox"/>
Mobile Push Registrations	<input type="checkbox"/>
Data.com User Type	<input type="checkbox"/>
Accessibility Mode (Classic Only)	<input type="checkbox"/>
Debug Mode	<input type="checkbox"/>
High-Contrast Palette on Charts	<input type="checkbox"/>
Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
Send Apex Warning Emails	<input type="checkbox"/>
Salesforce CRM Content User	<input checked="" type="checkbox"/>
Receive Salesforce CRM Content Email Alerts	<input checked="" type="checkbox"/>

Milestone 7: Validation rules

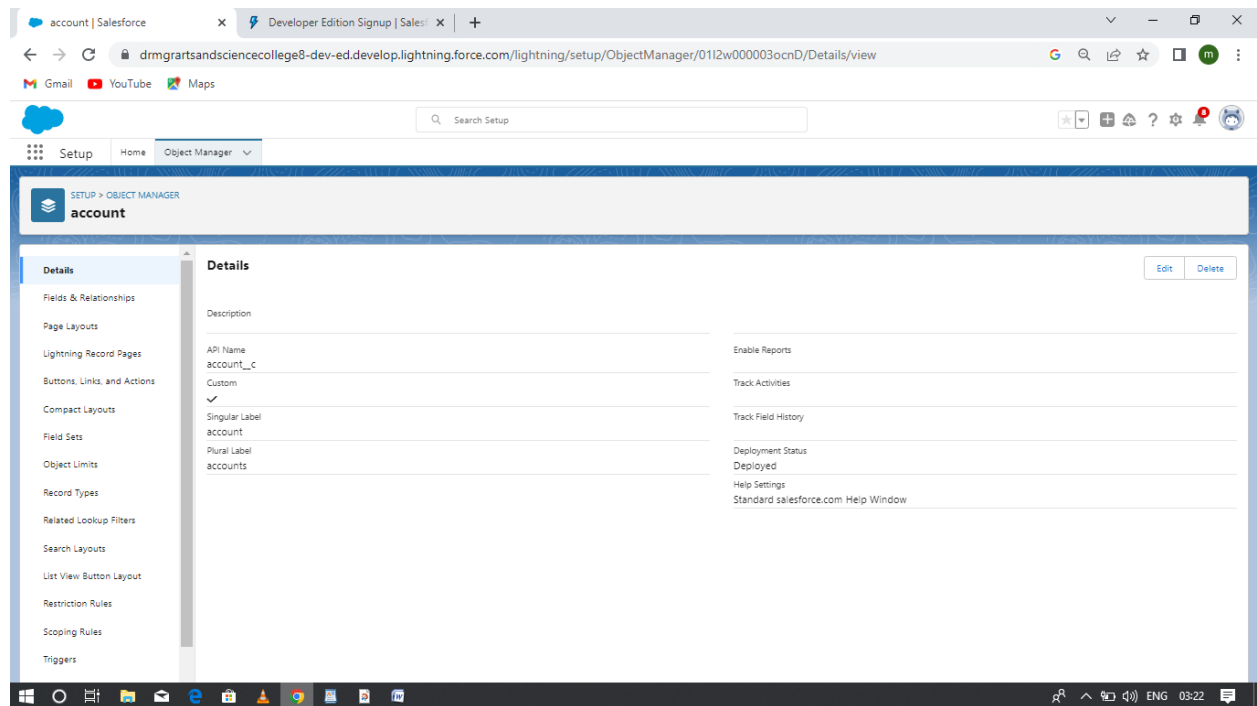
Activity 1 :Creation of validation rules

The screenshot shows the Salesforce 'Object Manager' page for the 'account' object. The page is divided into two main sections: 'Details' and 'Validation Rules'. The 'Details' section contains a table of object information, including Description, API Name, Custom, Singular Label, Plural Label, and Object Limits. The 'Validation Rules' section contains a table of validation rules, including Enable Reports, Track Activities, Track Field History, Deployment Status, Help Settings, and Standard salesforce.com Help Window.

Details	
Description	
API Name	account__c
Custom	<input checked="" type="checkbox"/>
Singular Label	account
Plural Label	accounts
Object Limits	

Validation Rules	
Enable Reports	
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Activity 2 : Cross object Formula



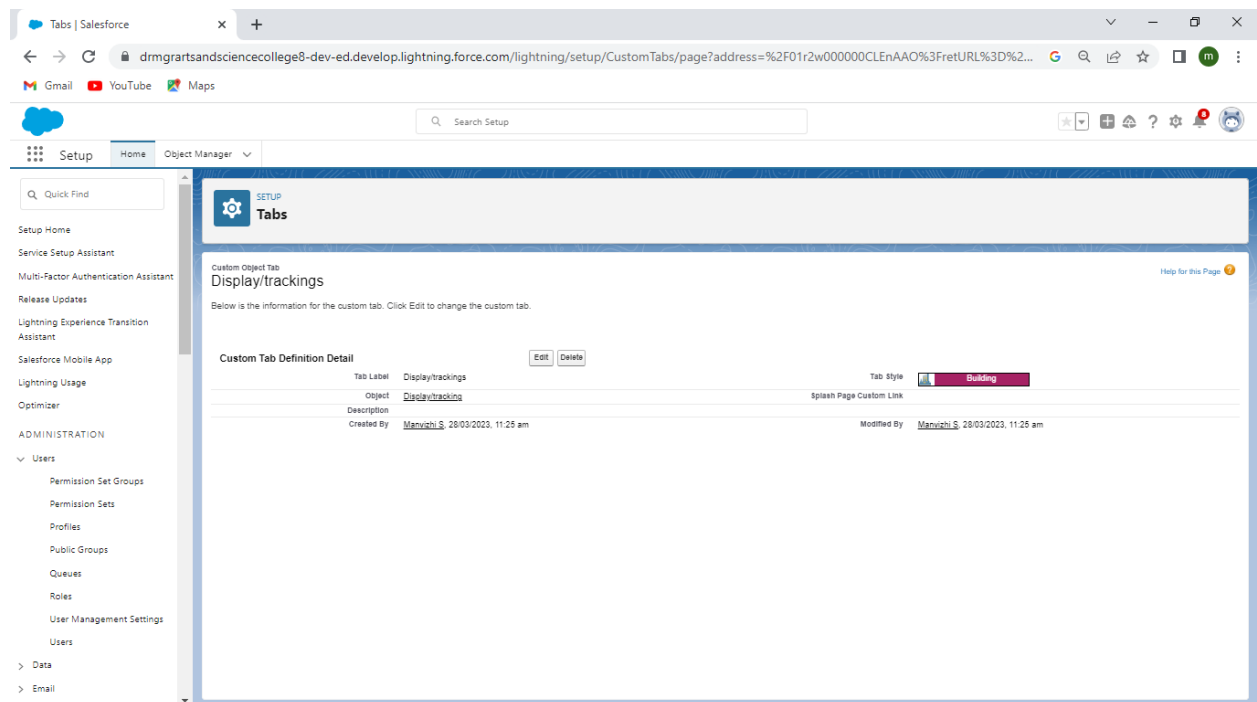
The screenshot shows the Salesforce Object Manager interface for the 'account' object. The left sidebar lists various configuration options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, and Triggers. The 'Details' section is active, showing the following information:

- Description:** API Name: account__c, Custom: ☒, Singular Label: account, Plural Label: accounts
- Enable Reports:** ☐
- Track Activities:** ☐
- Track Field History:** ☐
- Deployment Status:** Deployed
- Help Settings:** Standard salesforce.com Help Window

Buttons for 'Edit' and 'Delete' are visible in the top right corner of the details section.

Milestone 7: Reports

Activity 1: Creation of report



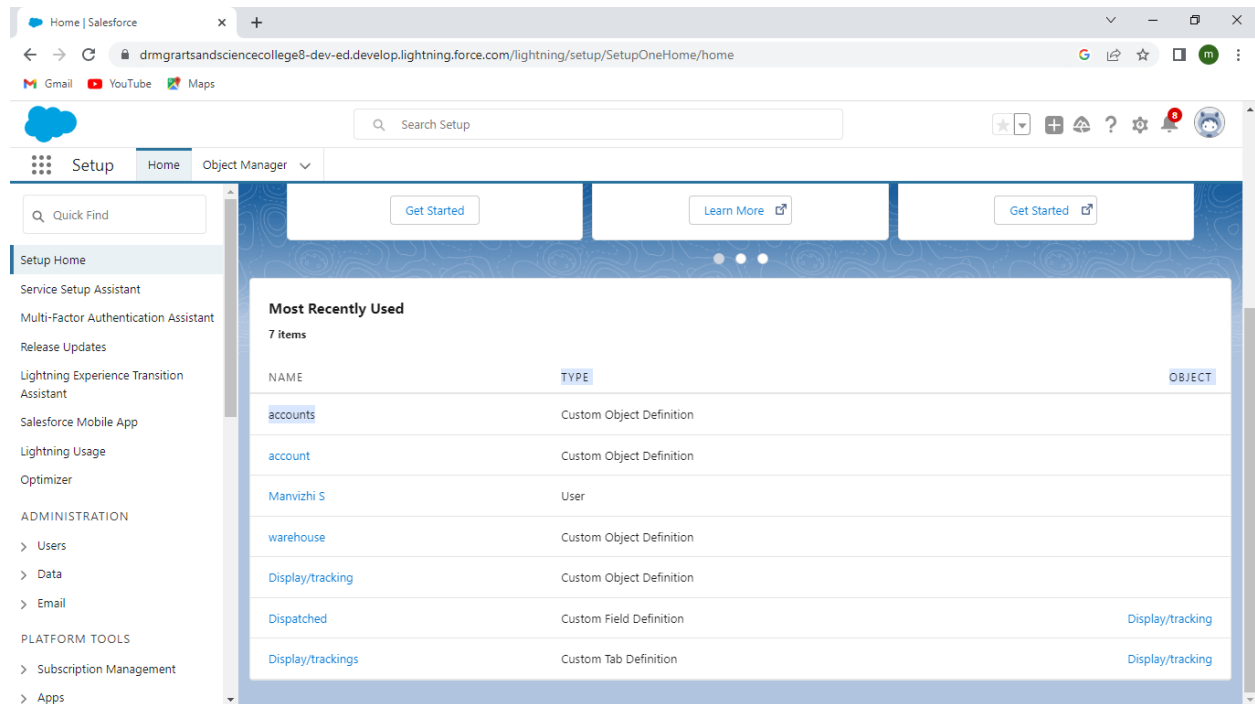
The screenshot shows the Salesforce Setup interface for Custom Tabs. The left sidebar lists various setup options: Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION, Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Users, Data, and Email. The 'Custom Tab Definition Detail' section is active, showing the following information:

- Custom Object Tab:** Display/trackings
- Below is the information for the custom tab. Click Edit to change the custom tab.**
- Custom Tab Definition Detail:** Tab Label: Display/trackings, Object: Display/trackings, Description: , Created By: Manojhi S, 28/03/2023, 11:25 am, Modified By: Manojhi S, 28/03/2023, 11:25 am
- Tab Style:** Building
- Splash Page Custom Link:**

Buttons for 'Edit' and 'Delete' are visible in the top right corner of the custom tab definition detail section.

Milestone 8 : Dashboards

Activity : Creation of Dashboards



4 TRAILHEAD PROFILE PUBLICURL

Team lead - <https://trailblazer.me/id/mvizhi3>

Team member 1 - <https://trailblazer.me/id/marul29>

Team member 2 – <https://trialblazer.me/id/mari13>

Team member 3 - <https://trailblazer.me/id/monim47>

5 ADAVANTAGES AND DISADVANTAGES

List of Advantages

1. Customer satisfaction

The biggest advantage of retail management is customer satisfaction. Efficacious planning and management prevent the situation where the customers need to be kept waiting. Even if there are a lot of people in the store, as in the case of festivities, managing the orders is the key to success.

It is the task of the retail manager to ensure that the customer executives assist the customers and attend to everyone properly.

2. Hassle-free shopping

It helps the customers to find all the products easily in the store. All the products are arranged properly by categorizing them according to their price, quantity, brand, etc, so the customers can easily find the desired products in no time. The retailers won't even need to get up and fetch the product for their customers. Just the way a customer feels satisfied after a good shopping experience, it also helps in saving the retailer's time.

3. Prevents unnecessary chaos and shoplifting activities

Proper Retail Management prevents a lot of unnecessary crowding and chaos in the shop. The customers enter, pick up their favorite products, pay the bills and leave with a smile. That's an example of effective retail management. This kind of management also keeps a check on the shoplifters.

List of Disadvantages

1. High Marketing Cost

Retailers should make investment in decoration of shop and display of goods to attract more customers. So, it requires more marketing or advertising cost than wholesalers.

2. Selling Skill Required

It requires good selling skill to attract customers. Retailers should possess the art of good communication and convincing power to influence consumers.

3. Very High Competition

Another disadvantage of retailing is that there is tough competition in the market because several retailers sell similar types of products. So, it is difficult to remain in the competitive environment.

4. No Economies Of Buying

Retailers buy small volume of products from wholesalers. So, they miss the opportunity to enjoy the benefit of economies of buying.

6 APPLICATIONS

The term "retail", it refers to the sale of items to the general population in modest amounts for usage or consumption. The curriculum of Retail Management at Acharya Nagarjuna University is designed to provide broad knowledge covering sales and promotional techniques, planning, product and brand management, and international retailing. Because this profession will always have openings in the ever-changing business world, here are the top five advantages of pursuing an online degree in retail management.

Enhanced Sales Competence

To satisfy the sales expertise needed in the fast paced industries, the curriculum of retail management diploma program will educate aspirants on how to connect with customers, sell products, and build consumer loyalty. These are talents that can be applied in a variety of different domains of work.

Develop Leadership Skills

To ensure that aspirants have a firm grasp on management, administration, and leadership abilities, the tailored retail management studies cover topics such as sales and promotional techniques, international retailing, and planning. Such skills are welcomed in every prospective job industry and are highly beneficial for career advancement.

Improve Analytical Abilities

Gain professional characteristics that include the capacity to think critically, evaluate facts, make tough decisions, and solve complicated situations. At Acharya Nagarjuna University, besides retail process management studies, gain such crucial skill sets that entail drawing in additional knowledge and cognitively processing it in a relevant manner.

Learn To Comprehend

Every aspect of our lives requires comprehension. Industries highly value employees who know how to comprehend with the consumer to deliver the exact product and communicate to convince

and represent a brand's value. An individual who knows to comprehend would never fail to negotiate even when it comes to their career growth.

7 CONCLUSION

In this course 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 – the message, the media and the communication tools.

You have considered the basics of the communication model that underpins the development of marketing communication messages. You have also explored what it takes to develop a communication message, how to use communications to build a brand and the characteristics of the different media that might carry marketing communications.

In addition, you have identified a range of communication tools which make up the marketing communication mix.

The course has also aimed to introduce the importance of marketing and communication from a retail perspective.

8 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.s