



RETAIL MANAGEMENT APPLICATION USING SALESFORCE

1. INTRODUCTION

1.1 Overview:

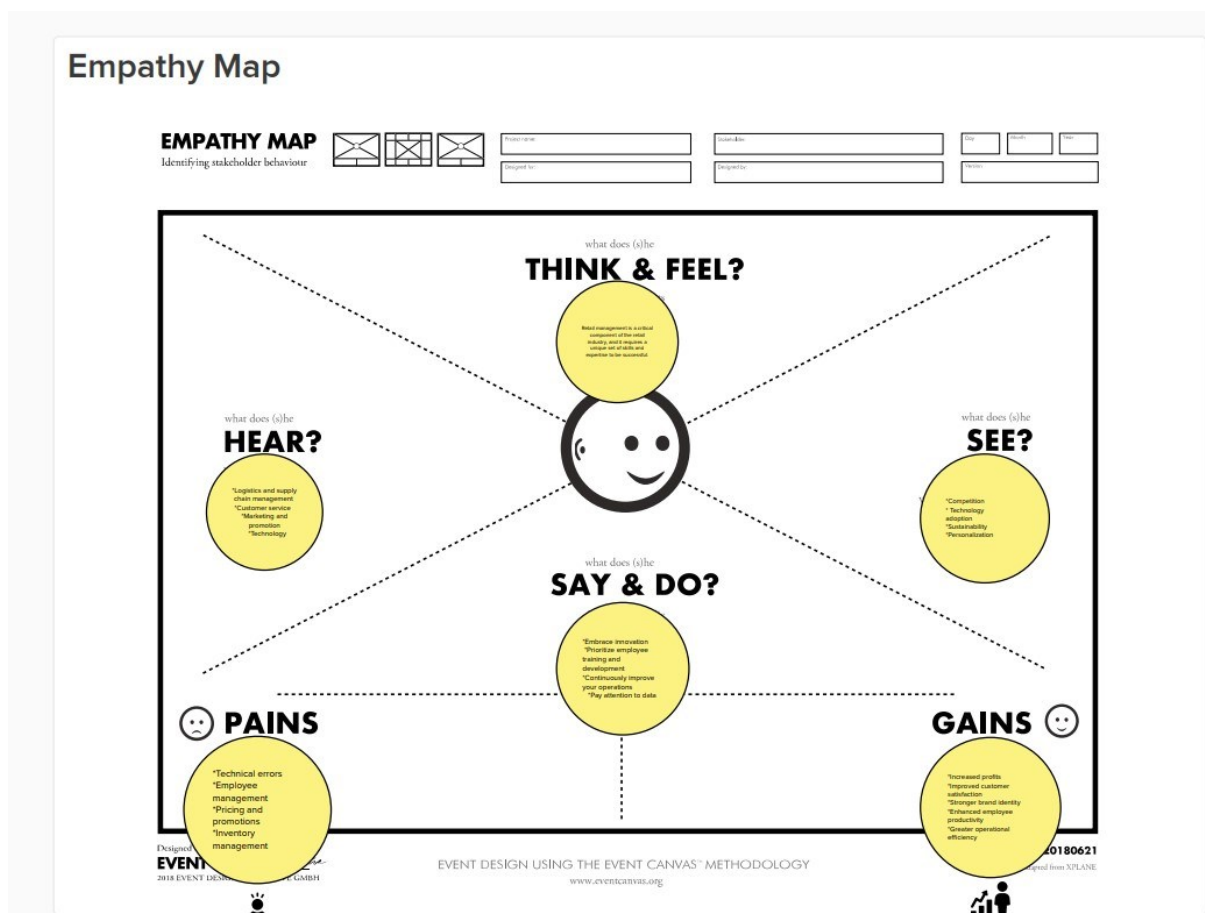
Retail management refers to the process that consumers are satisfied with the products and services. They buy the products and the retail establishments function well and continue the business to be more profitable.

1.2 Purpose:

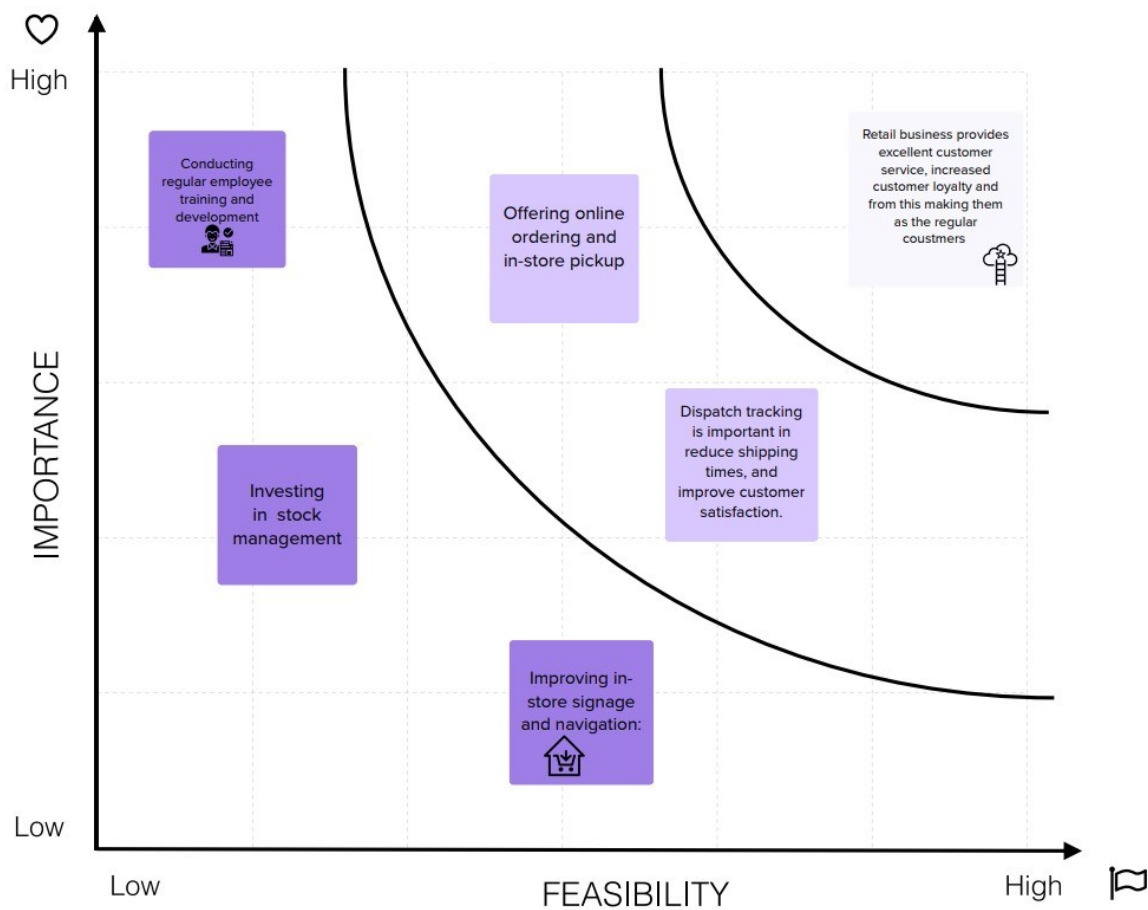
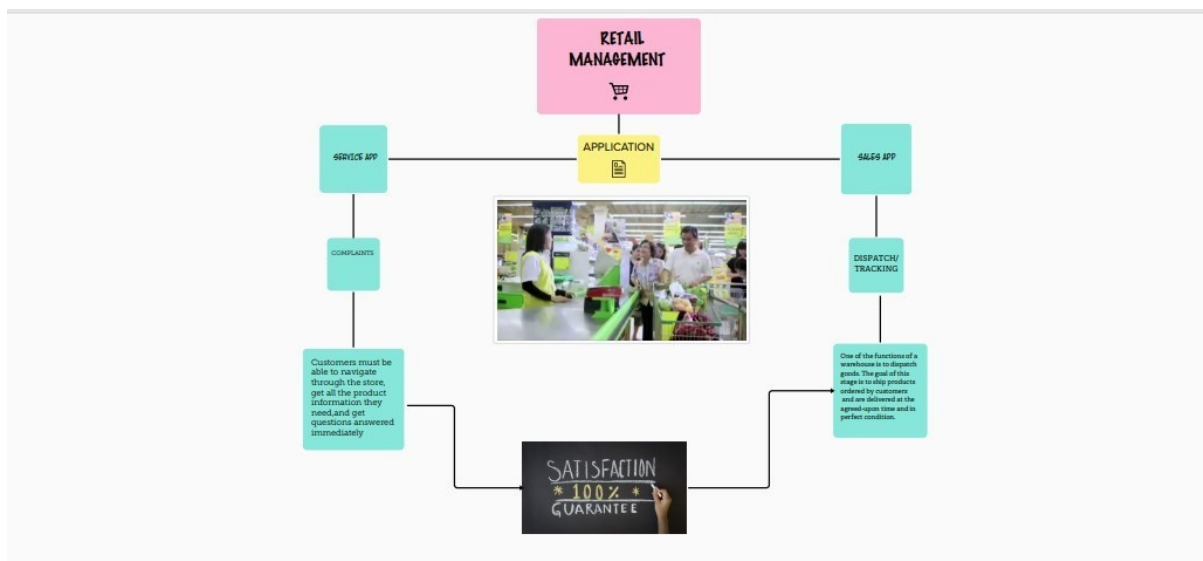
Retail management optimizes internal processes such as inventory management offline and online storefronts, warehouse operations, payment and accounting.

2. PROBLEM DEFINITION & DESIGN THINKING

2.1 Empathy Map



2.2 Ideation & Brainstorming Map



3.RESULT

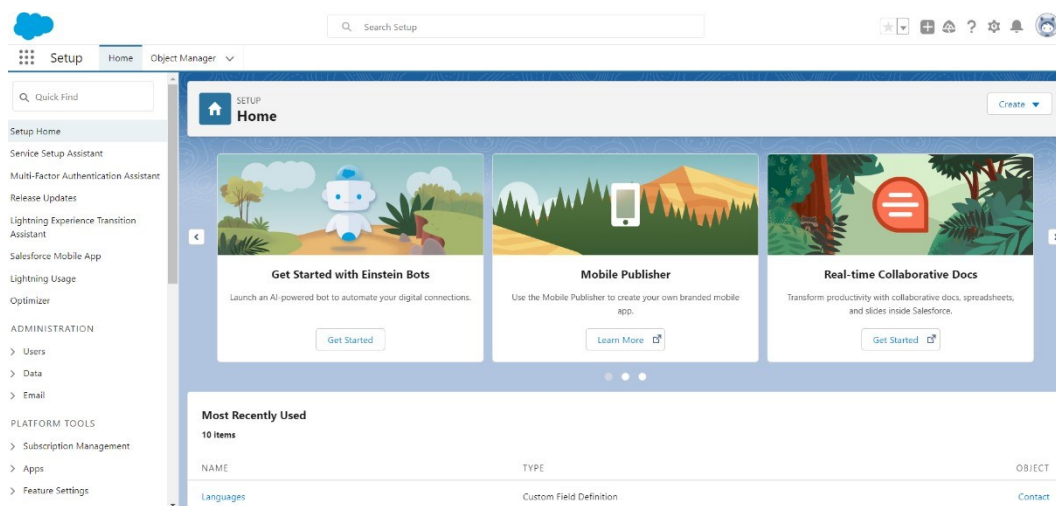
3.1 Data Model:

Object name	Fields in the Object	Data typen the Object
Dispatch and Tracking	Dispatch Expected Date of Delivery Tracking id	Checkbox Date Auto Number
Sales order	Sales order	Master-Detail (\$ales order)
Warehouse	Warehouse	Checkbox

3.2 Activity & Screenshot

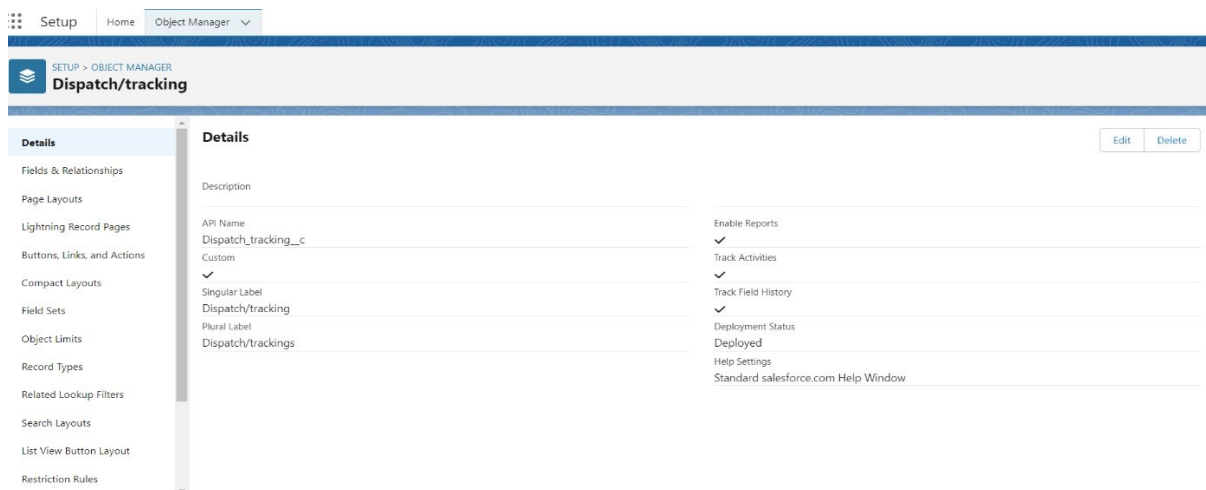
Activity: 1

Salesforce Account Login.



Activity: 2

Creation of object (Dispatch/ tracking).



Activity: 3

Fields available on Dispatch / Tracking.

1. Expected Date of Delivery.
2. Dispatched
3. Tracking Id

SETUP > OBJECT MANAGER
Dispatch/tracking

Details

Fields & Relationships
7 Items, Sorted by Field Label

Q 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		
Expected Date of delivery	Expected_Date_of_delivery__c	Date		
Last Modified By	LastModifiedById	Lookup(User)		
Sales order	Sales_order__c	Master-Detail(Sales order)		✓
Tracking id	Tracking_id__c	Auto Number (External ID)		✓

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

Activity: 4

Master Detail relationship b/w Dispatch/tracking and sales order.

SETUP > OBJECT MANAGER
Dispatch/tracking

Details

Fields & Relationships

Dispatch/tracking Custom Field
Sales order
[Back to Dispatch/tracking](#)

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	thulasi.petri/asamy, 4/11/2023, 9:12 AM	Modified By	thulasi.petri/asamy, 4/11/2023, 9:12 AM

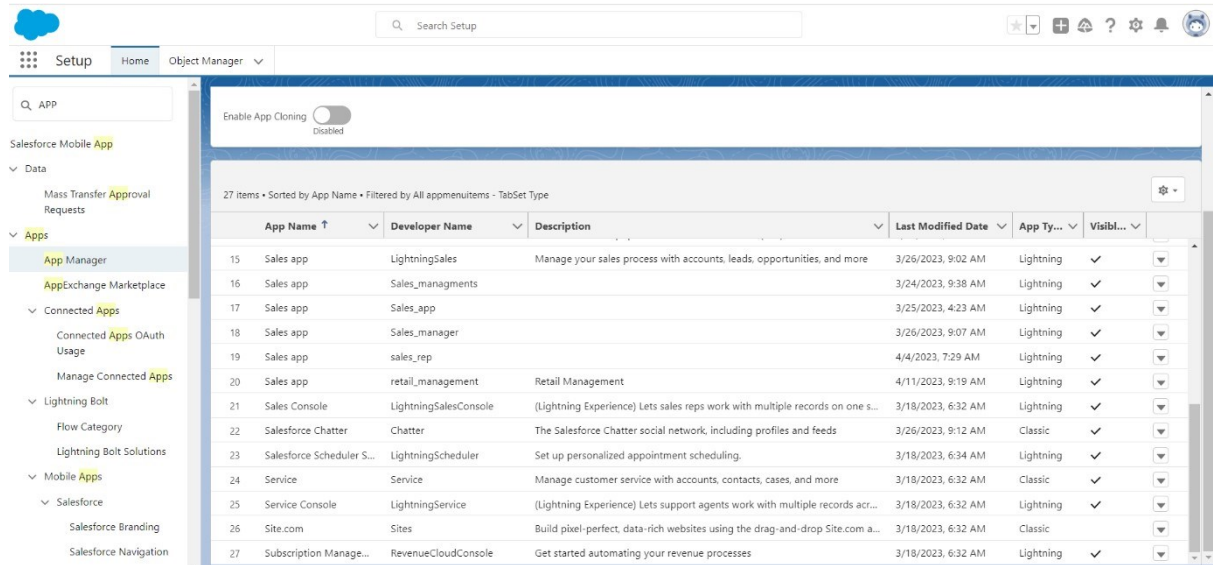
Master-Detail Options

Related To	Sales_order	Child Relationship Name	Dispatch_trackings
Related List Label	Dispatch/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.		
Reparentable Master Detail	<input type="checkbox"/>		

Location Editor

Activity: 5

Creation of Application Using Lightning App.



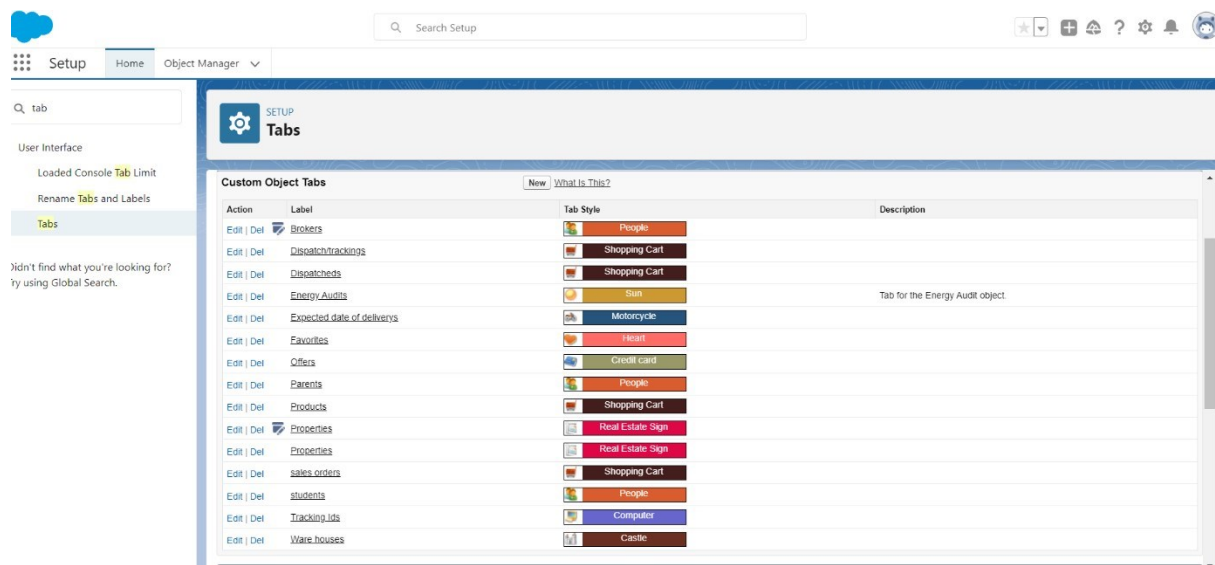
The screenshot shows the Salesforce Setup interface with the 'App Manager' page selected. The left sidebar shows the navigation menu with 'Apps' expanded. The main content area displays a table of 27 apps, sorted by App Name. The table includes columns for App Name, Developer Name, Description, Last Modified Date, App Type, and Visibility. The 'Enable App Cloning' toggle is set to 'Disabled'.

	App Name	Developer Name	Description	Last Modified Date	App Ty...	Visibl...
15	Sales app	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	3/26/2023, 9:02 AM	Lightning	✓
16	Sales app	Sales_managements		3/24/2023, 9:38 AM	Lightning	✓
17	Sales app	Sales_app		3/25/2023, 4:23 AM	Lightning	✓
18	Sales app	Sales_manager		3/26/2023, 9:07 AM	Lightning	✓
19	Sales app	sales_rep		4/4/2023, 7:29 AM	Lightning	✓
20	Sales app	retail_management	Retail Management	4/11/2023, 9:19 AM	Lightning	✓
21	Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one s...	3/18/2023, 6:32 AM	Lightning	✓
22	Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and feeds	3/26/2023, 9:12 AM	Classic	✓
23	Salesforce Scheduler S...	LightningScheduler	Set up personalized appointment scheduling.	3/18/2023, 6:34 AM	Lightning	✓
24	Service	Service	Manage customer service with accounts, contacts, cases, and more	3/18/2023, 6:32 AM	Classic	✓
25	Service Console	LightningService	(Lightning Experience) Lets support agents work with multiple records acr...	3/18/2023, 6:32 AM	Lightning	✓
26	Site.com	Sites	Build pixel-perfect, data-rich websites using the drag-and-drop Site.com a...	3/18/2023, 6:32 AM	Classic	✓
27	Subscription Manage...	RevenueCloudConsole	Get started automating your revenue processes	3/18/2023, 6:32 AM	Lightning	✓

Activity: 6

Creation of custom Tabs for Layout.

1. Warehouse
2. Sales order
3. Dispatch/Tracking
4. Students
5. Parents

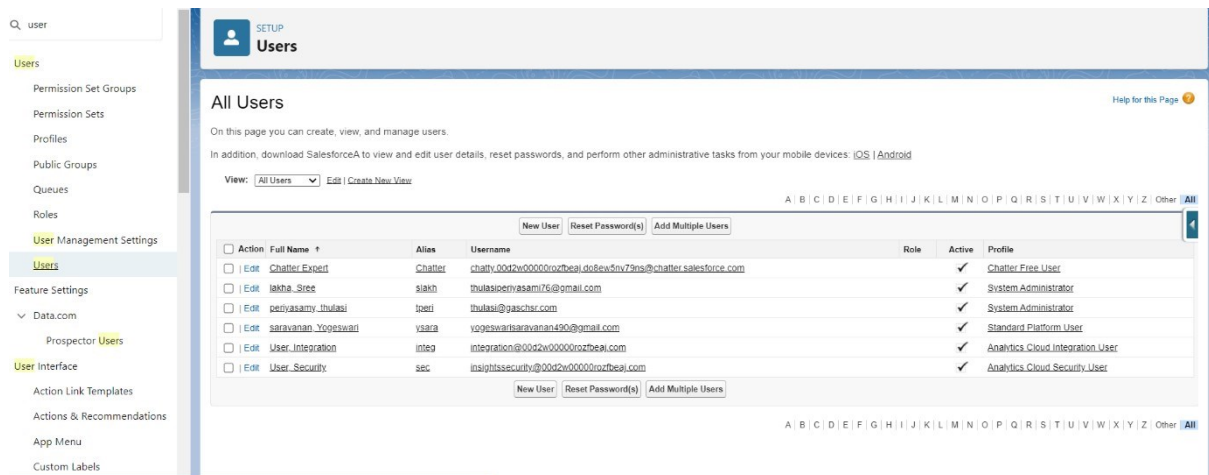


The screenshot shows the Salesforce Setup interface with the 'Custom Object Tabs' page selected. The left sidebar shows the navigation menu with 'User Interface' expanded. The main content area displays a table of custom tabs, sorted by Label. The table includes columns for Action, Label, Tab Style, and Description. The 'New' button is visible at the top right of the table.

Action	Label	Tab Style	Description
Edit Del	Brokers	People	
Edit Del	Dispatch/Trackings	Shopping Cart	
Edit Del	Dispatched	Shopping Cart	
Edit Del	Energy Audits	Sun	Tab for the Energy Audit object
Edit Del	Expected date of deliveries	Motorcycle	
Edit Del	Favorites	Heart	
Edit Del	Offers	Credit Card	
Edit Del	Parents	People	
Edit Del	Products	Shopping Cart	
Edit Del	Properties	Real Estate Sign	
Edit Del	Properties	Real Estate Sign	
Edit Del	sales orders	Shopping Cart	
Edit Del	students	People	
Edit Del	Tracking ids	Computer	
Edit Del	Warehouses	Castle	

Activity: 7

Creation of User (Sree lakha)

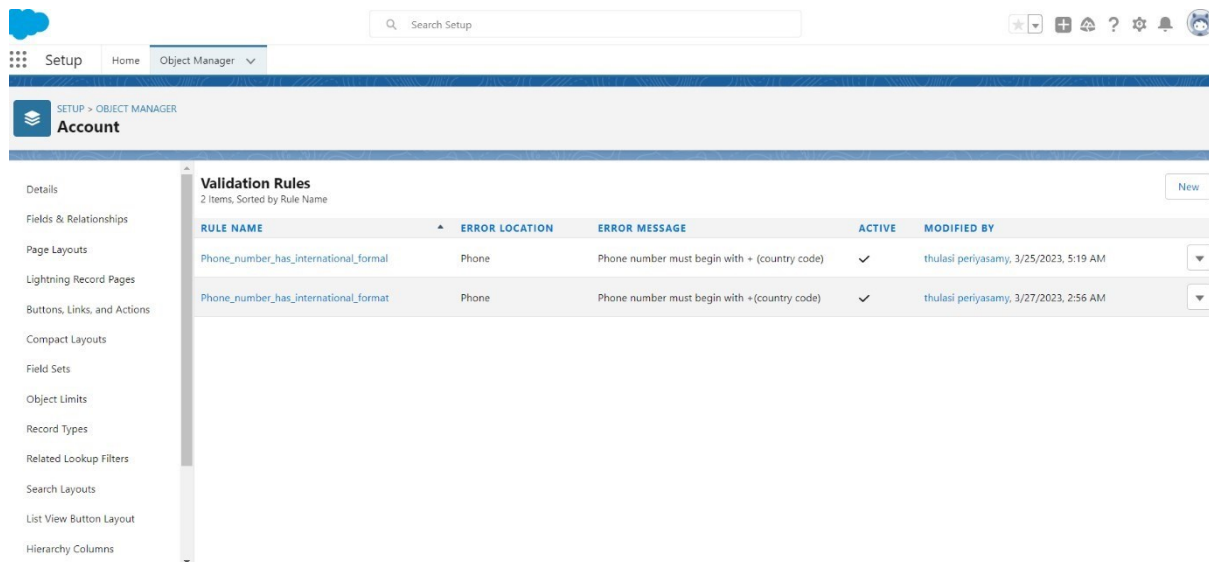


The screenshot shows the Salesforce Setup interface for the 'Users' section. The left sidebar contains navigation links for Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and User Interface. The main content area is titled 'All Users' and includes instructions on how to manage users. Below the instructions, there is a table listing existing users with columns for Action, Full Name, Alias, Username, Role, Active status, and Profile. The table contains six users, including 'Sree lakha'.

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatter.0042v00000rozbeaj.d08w5ny7ns@chatter.salesforce.com		✓	Chatter Free User
Edit	Sree lakha	slakha	thulasiemvasam76@gmail.com		✓	System Administrator
Edit	periyasamy thulasi	test	thulasi@gascher.com		✓	System Administrator
Edit	saravanan Yogeswari	ysara	yogeswari.saravanan490@gmail.com		✓	Standard Platform User
Edit	User Integration	integ	integration@00d2v00000rozbeaj.com		✓	Analytics Cloud Integration User
Edit	User Security	sec	insightsecurity@00d2v00000rozbeaj.com		✓	Analytics Cloud Security User

Activity: 8

Validation Rule (Account Object)



The screenshot shows the Salesforce Setup interface for the 'Validation Rules' section under the 'Account' object. The left sidebar contains navigation links for 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, and Hierarchy Columns. The main content area is titled 'Validation Rules' and shows a list of two validation rules for the 'Phone' field.

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Phone_number_has_international_format	Phone	Phone number must begin with + (country code)	✓	thulasi periyasamy, 3/25/2023, 5:19 AM
Phone_number_has_international_format	Phone	Phone number must begin with + (country code)	✓	thulasi periyasamy, 3/27/2023, 2:56 AM

Activity: 9

Cross Object Formula (Contact)

SETUP > OBJECT MANAGER

Contact

Details

Fields & Relationships

33 • Items, Sorted by Field Label

Q Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Account Name	AccountId	Lookup(Account)		✓
Account Website	Account_Website_c	Formula (Text)		
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)		

Activity: 10

Report Using Warehouse

Sales app

Home

Opportunities

Leads

Tasks

Files

Accounts

Contacts

Campaigns

Dashboards

Reports

Chatter

Groups

Calendar

More

Reports

Recent

3 items

Q Search recent reports...

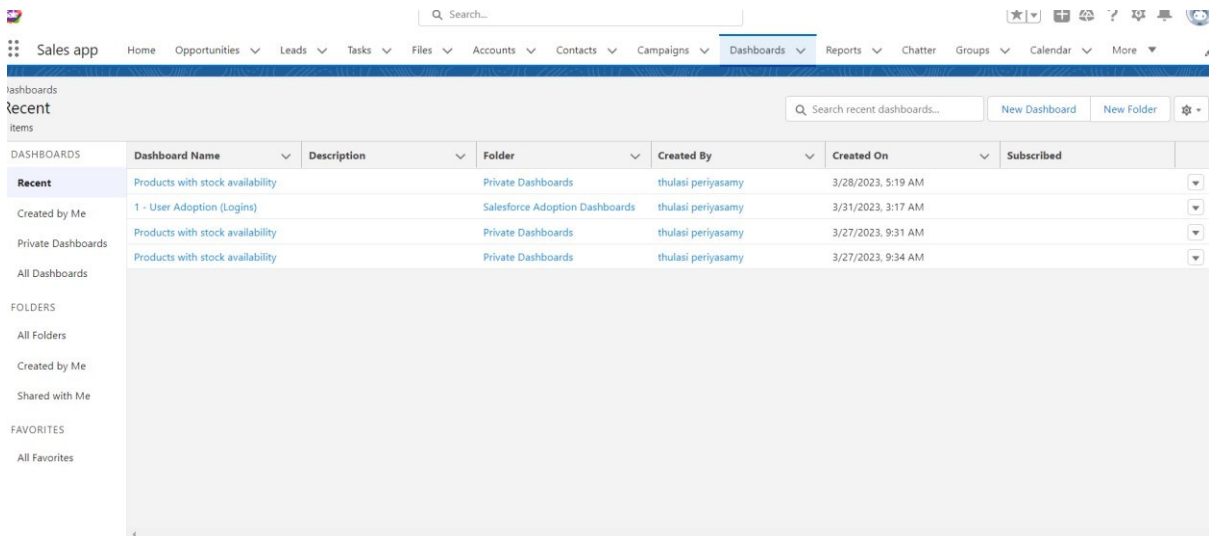
New Report

New Folder

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	DB-Adoption: CAMPAIGNS by Status	Status of all campaigns on a monthly basis	DB - Adoption	thulasi periyasamy	3/31/2023, 3:17 AM	
Created by Me	New Ware houses Report		Private Reports	thulasi periyasamy	3/28/2023, 5:18 AM	
Private Reports	New Ware houses Report		Private Reports	thulasi periyasamy	3/27/2023, 3:03 AM	
Public Reports						
All Reports						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						

Activity: 11

Dashboard (Products with stock availability)



The screenshot shows the Salesforce Sales app interface. The top navigation bar includes a search bar and various app icons. The left sidebar shows the 'Dashboards' menu. The main content area displays a list of recent dashboards. The dashboard 'Products with stock availability' is highlighted.

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Products with stock availability		Private Dashboards	thulasi periyasamy	3/28/2023, 5:19 AM	
Created by Me	1 - User Adoption (Logins)		Salesforce Adoption Dashboards	thulasi periyasamy	3/31/2023, 3:17 AM	
Private Dashboards	Products with stock availability		Private Dashboards	thulasi periyasamy	3/27/2023, 9:31 AM	
All Dashboards	Products with stock availability		Private Dashboards	thulasi periyasamy	3/27/2023, 9:34 AM	

4.Trailhead Profile Public URL:

Team Lead : <https://trailblazer.me/id/ravi07>

Team member 1 : <https://trailblazer.me/id/tdharanya1>

Team member 2 : <https://trailblazer.me/id/ppasupathi1>

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

5.ADVANTAGES

1.Salesforce can be used to manage orders from retail stores and distributors, including tracking orders, processing payments, and managing inventory levels.

2. This can help field sales teams ensure that orders are fulfilled quickly and accurately and that inventory levels are maintained at optimal levels.

- Customer Engagement
- Data Management
- Inventory Management
- Inventory Management

DISADVANTAGE

- We spent more cost for the software.
- High Competition between retailers.
- More Expensive.

6.APPLICATIONS

The retail sectors are prominently divided into **Food, Clothing & Textiles, Consumer Durables, Footwear, Jewellery, Stationary & Gift Articles.**

7.CONCLUSION

First, we create a developer account using salesforce platform. After that we create custom object for our retail management projects. Custom objects are objects that we create to store information on database tables that permit you to store data and in the page layout we generate some page layout for the purpose of customize the design, detail and edit pages of records in retail management. The next step we done relationship between two objects so that when users view records, they can also see and access related data. From there we create Lightning app named on Sales App. In Validation rule we launch a lightning app and it contain a formula or expression that evaluates the date in one or more fields and returns a value of "True" or "False". We construct a report a list of records that meet the criteria. It displayed in row and columns and we can be filtered, grouped in graphical chart. In dashboard we represent our products with stock availability in donut chart.

8.FUTURE SCOPE

With the continuous expansion of the retail industry, there is a growing demand for retail courses that will prepare students to scope with the tactics, procedures, and methods that will help them to develop the new software's and it made the usage of the apps are easy for customer.
