

Retail Management System

The Retail Management System is built on the **Salesforce platform** to streamline retail operations. It leverages Salesforce custom objects, flows, dashboards, and role-based access to manage inventory, record customer purchases, generate bills, and update stock automatically after payment—delivering a complete, no-code solution for shop management.

Problem Statement

Small and medium retail shops often rely on manual methods like notebooks, spreadsheets, or basic billing software to manage sales and inventory. These approaches lead to challenges such as:

- **Inaccurate stock tracking** → shop owners don't always know real-time availability.
- **Billing errors** → manual calculation of totals and discounts causes mistakes.
- **Lack of role-based access** → workers may get unrestricted access, risking data inconsistency.
- **No centralized system** → sales, inventory, and payments are scattered across different tools.
- **Limited visibility** → shop owners cannot easily view reports, sales trends, or real-time dashboards.

Stakeholder Analysis

- **Shop Owner** - Manages the shop and inventory, oversees sales, monitors revenue.

- Customers- Provide purchase details, make payments, receive bills.
- Shop Worker - Enter customer purchase details, generate bills.
- Salesforce Admin - Configures Salesforce objects, flows, permissions, dashboards.

Requirement Gathering

- Shop owners must be able to create and manage **item records** with name, price, and available stock.
- Workers should have access to record **customer details** (name, email, phone) and purchased items.
- The system should **automatically calculate bills** based on item price and quantity.
- After a successful payment, the **inventory stock should decrease** accordingly.
- Role-based access must be enforced: **Owner (full control), Worker (limited access)**.
- The system should allow generation of **sales reports and dashboards** for owners.
- Customers must receive an **auto-generated bill/invoice** after purchase.
- Owners should have visibility into **real-time stock levels**.

Business Process Mapping

- Customers give purchase details to Workers.
- Workers enter data in Salesforce.
- The system generates bills, processes payments, updates stock, and provides reports for the Owner.

AppExchange Exploration

- Reviewed retail, inventory, and billing apps on **Salesforce AppExchange**.
- Examples: **Inventory management apps, point-of-sale (POS) solutions, and payment processing packages**.
- Key features observed: **automated stock updates, sales tracking dashboards, real-time billing, and role-based access control**.
- These insights help design a **Salesforce-native, customized retail management system** that streamlines shop operations and improves accuracy.