

Project Title : Retail Management System

- **Industry:** Healthcare / E-commerce
 - **Project Type:** Salesforce CRM Implementation (Sales & Inventory Management)
 - **Target Users:** Shop owner , store manager , workers .
-

Problem Statement

Retail businesses often face challenges in managing stock, tracking sales, and ensuring smooth customer transactions. Manual handling of inventory, invoices, and payments leads to errors, delays, and revenue loss. Customers also expect faster service and transparency in billing.

To solve this, we propose a **Salesforce-based Retail Management System** that will:

☒ Use Cases

1. **Product and Inventory Management**
 - Capture product details - name , category , price , stock quantity.
 - Store reorder levels of product .
 2. **Customer and Order Management**
 - Create and manage orders .
 - Auto generate invoices for sales .
 3. **Payment and Billing**
 - Track payments.
 - Send reminders for pending dues.
 4. **Notifications & Alerts**
 - Payment due reminders to customers.
-

◇ Data Modelling & Relationships

Standard & Custom Objects

Salesforce provides some standard objects (like Users, Accounts, Contacts), but since our project is domain-specific, we will create custom objects to represent Product, order , inventory .

Custom Objects & Fields

1. Product

- **Fields:**
 - Category (Picklist)
 - Price (Currency)
 - Sold Items (Number)

SETUP > OBJECT MANAGER

Product

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
Category	Category__c	Picklist		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Price	Price__c	Currency(10, 2)		
Product Name	Name	Text(80)		✓
Sold Items	Sold_Items__c	Number(18, 0)		

orgfarm-f654c7dd86-dev-ed.develop.lightning.force.com/lightning/r/Donor_c__a01gK00000Km1BDQAZ/view

Search...

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups Donors More

Donor
Ram Patil

New Contact Edit New Opportunity

Related **Details**

Donor Name	Ram Patil	Owner	Vaijayanti Lakhe
Age	35		
Gender	Male		
Blood Group	O+		
Location	Pune		
Last Donation Date	11/29/2024		
Eligible	<input checked="" type="checkbox"/>		
Created By	Vaijayanti Lakhe, 9/17/2025, 5:26 AM	Last Modified By	Vaijayanti Lakhe, 9/17/2025, 5:26 AM

2. Order

- **Fields:**
 - Customer (Lookup ----> Account)
 - Order Date (Date)
 - Product (Lookup ----> Product)
 - Quantity (Number)
 - Total Price (Formula----> Currency)

The top screenshot shows the Salesforce Setup interface for the 'Order' object. The left sidebar contains a list of setup options: 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, Scoping Rules, and Object Access. The main content area is titled 'Details' and includes fields for Description, API Name (Order_c), Custom (checked), Singular Label (Order), Plural Label (Orders), and a list of settings: Enable Reports (checked), Track Activities (checked), Track Field History, Deployment Status (Deployed), Help Settings, and a link to Standard salesforce.com Help Window. There are 'Edit' and 'Delete' buttons in the top right.

The bottom screenshot shows the 'Fields & Relationships' page for the 'Order' object. The left sidebar is the same as the top screenshot. The main content area is titled 'Fields & Relationships' and shows a table of 9 items, sorted by Field Label. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: Created By (CreatedById, Lookup(User)), Customer (Customer_c, Lookup(Account)), Last Modified By (LastModifiedById, Lookup(User)), ORD-(0001) (Name, Text(80)), Order Date (Order_Date_c, Date), Owner (OwnerId, Lookup(User,Group)), Product (Product_c, Lookup(Product)), Quantity (Quantity_c, Number(18, 0)), and Total Price (Total_Price_c, Formula (Currency)).

3. Inventory

- **Fields:**

- Product (Lookup ----> Product)
- Quantity in stock (Number)
- Record Level (Number)

Fields & Relationships
9 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Customer	Customer__c	Lookup(Account)		✓
Last Modified By	LastModifiedById	Lookup(User)		
ORD-(0001)	Name	Text(80)		✓
Order Date	Order_Date__c	Date		
Owner	OwnerId	Lookup(User/Group)		✓
Product	Product__c	Lookup(Product)		✓
Quantity	Quantity__c	Number(18, 0)		
Total Price	Total_Price__c	Formula (Currency)		

Details

Description

API Name: Inventory__c

Custom

Singular Label: Inventory

Plural Label: Inventories

Enable Reports: ✓

Track Activities: ✓

Track Field History

Deployment Status: Deployed

Help Settings: Standard salesforce.com Help Window

Page Layouts

- **Product Compact Layout** → Show Product Name, Price, Category, Quantity in Stock, Reorder Level
- **Inventory Compact Layout** → Show Product, Quantity in Stock, Reorder Level

The image displays two screenshots of the Salesforce Setup interface, specifically the Compact Layouts section under Object Manager.

Top Screenshot: Product Compact Layout

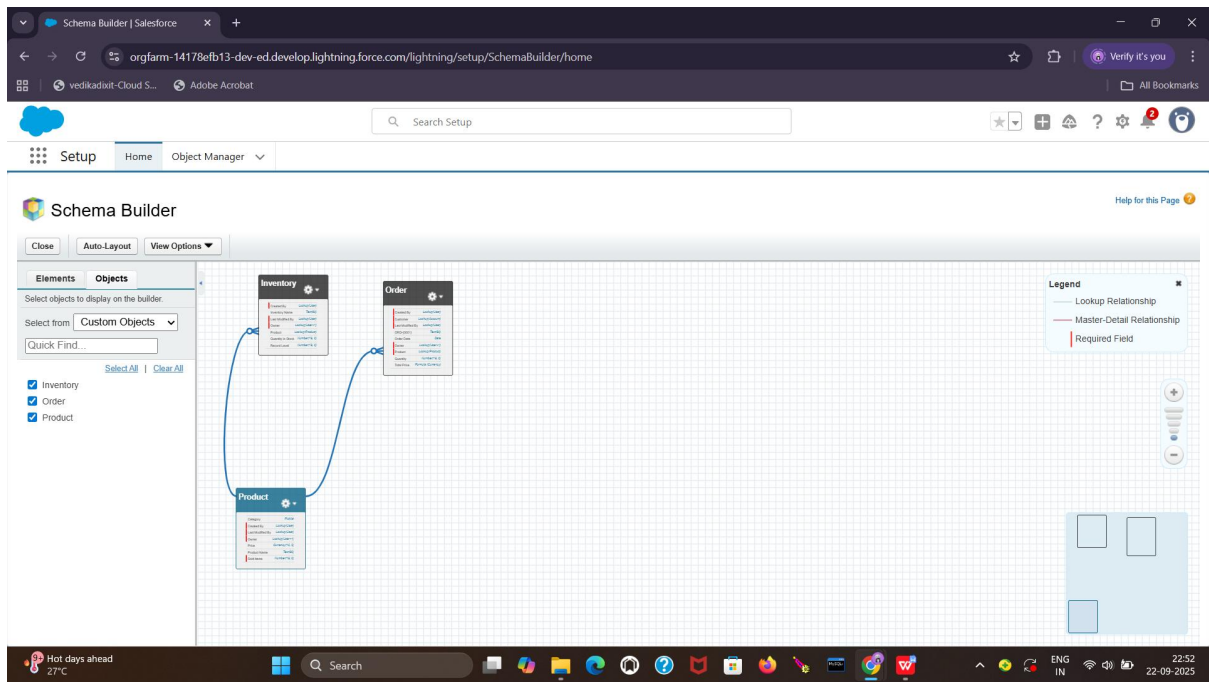
- Page Title:** Product Compact Layout
- Object Name:** Product
- Label:** Product Compact Layout
- API Name:** Product_Compact_Layout
- Included Fields:** Product Name, Price
- Created By:** Vedika Dixit, 9/22/2025, 9:56 AM
- Modified By:** Vedika Dixit, 9/22/2025, 9:56 AM

Bottom Screenshot: Inventory Compact Layout

- Page Title:** Inventory Compact layout
- Object Name:** Inventory
- Label:** Inventory Compact layout
- API Name:** Inventory_Compact_layout
- Included Fields:** Product, Quantity in Stock, Record Level
- Created By:** Vedika Dixit, 9/22/2025, 10:05 AM
- Modified By:** Vedika Dixit, 9/22/2025, 10:05 AM

Schema Builder

- Use Salesforce **Schema Builder** to design the relationships visually.
- Helps stakeholders understand data flow:
 - Product → Inventory → Order



Relationships

- **Product → Inventory:** One product can have multiple inventory records (Lookup)
- **Donor → Donation History:** One donor can donate multiple times. (Lookup)
- **Order → Product:** One order can include multiple products (Lookup or Junction object if using Order Line Items)
- **Volunteer → Donation Camp:** One volunteer organizes multiple camps. (Lookup)
- **Inventory → Order:** One inventory record can be used in multiple orders (Lookup)

Rationale

- **The Product–Order many-to-many relationship ensures flexibility** (one product can be included in multiple orders, and one order can contain multiple products).
- **The Reorder Level formula field ensures timely stock management** (alerts when inventory falls below a set threshold).
- **Separation of Product, Inventory, Customer, and Order objects keeps data organized** and mirrors real-world retail operations.