

# Project Title : Retail Management System

- **Project Type:** Salesforce CRM Implementation (Sales & Inventory Management)
  - **Target Users:** Shop owner , store manager , workers .
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## 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)

**Order**

**Details**

Description

API Name: Order\_c

Custom

Singular Label: Order

Plural Label: Orders

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Enable Reports: ☒

Track Activities: ☒

Track Field History

Deployment Status: Deployed

Help Settings

Standard salesforce.com Help Window

**Fields & Relationships**

9 Items, Sorted by Field Label

| FIELD LABEL      | FIELD NAME     | DATA TYPE          | CONTROLLING FIELD | INDEXED                             |
|------------------|----------------|--------------------|-------------------|-------------------------------------|
| Created By       | CreatedBy      | Lookup(User)       |                   |                                     |
| Customer         | Customer_c     | Lookup(Account)    |                   | <input checked="" type="checkbox"/> |
| Last Modified By | LastModifiedBy | Lookup(User)       |                   |                                     |
| ORD-(0001)       | Name           | Text(80)           |                   | <input checked="" type="checkbox"/> |
| Order Date       | Order_Date_c   | Date               |                   |                                     |
| Owner            | OwnerId        | Lookup(User,Group) |                   | <input checked="" type="checkbox"/> |
| Product          | Product_c      | Lookup(Product)    |                   | <input checked="" type="checkbox"/> |
| Quantity         | Quantity_c     | Number(18, 0)      |                   |                                     |
| 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) |                   |         |

**Inventory 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 configuration page. The top screenshot shows the 'Product Compact Layout' configuration. The bottom screenshot shows the 'Inventory Compact layout' configuration. Both screenshots include a left-hand navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, and Compact Layouts. The main content area shows the Compact Layout Detail for the respective object, including fields like Label, API Name, Included Fields, Object Name, Created By, and Modified By. The bottom screenshot also shows a 'Back to Inventory' link.

**Product Compact Layout**

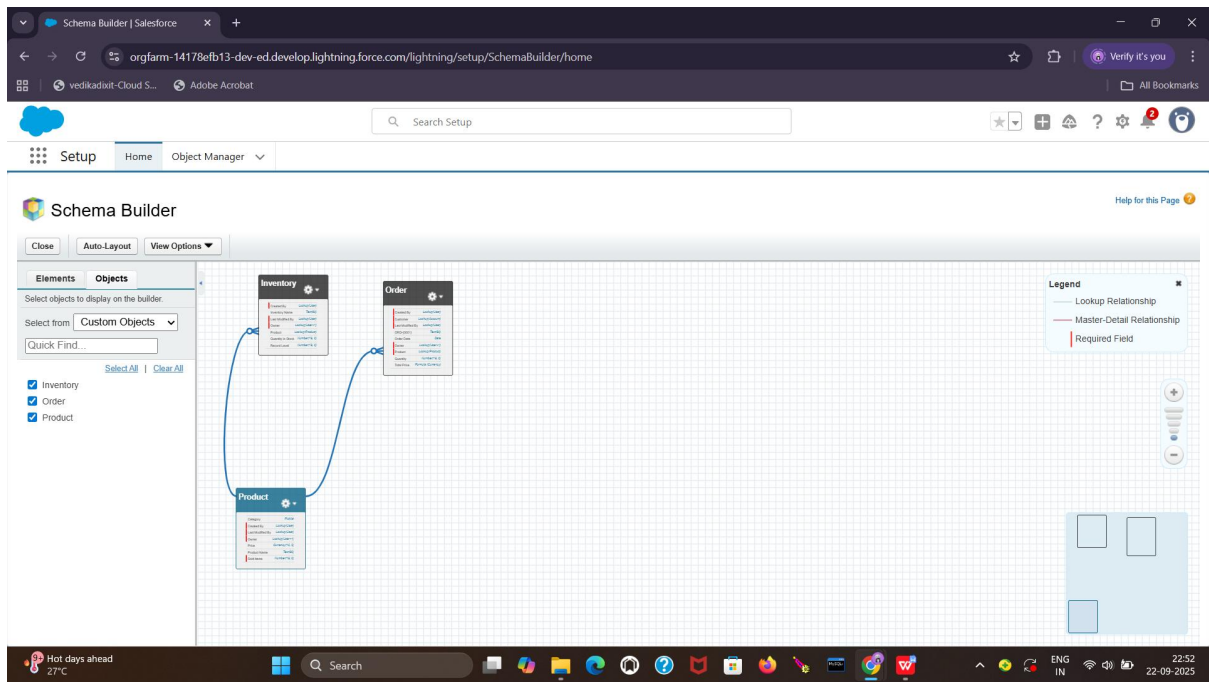
| Field           | Value                            |
|-----------------|----------------------------------|
| Label           | Product Compact Layout           |
| API Name        | Product_Compact_Layout           |
| Included Fields | Product Name, Price              |
| Object Name     | Product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

**Inventory Compact layout**

| Field           | Value                                    |
|-----------------|--|
| Label           | Inventory Compact layout                 |
| API Name        | Inventory_Compact_layout                 |
| Included Fields | Product, Quantity in Stock, Record Level |
| Object Name     | Inventory                                |
| 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.