Retail Management Application Using Salesforce

1. Introduction

1.1. Overview:

Customer relationship management (CRM) is a technology for managing all of a company's relationships and interactions with customers and potential customers. The goal is simple: Improve business relationships. A CRM system helps companies stay connected to customers, streamline processes, and improve profitability. Salesforce is a customer success platform, designed to help sell, service, market, analyze, and connect with customers. Salesforce has everything one needs to run their business from anywhere. Using standard products and features, one can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store data securely in the cloud.

Retailing encompasses the business activities involved in selling goods and services to consumers for their personal, family, household, etc. Retail management is the process of increasing sales, brand awareness, and customer satisfaction by means of improving communication with customers and the services provided.

1.2. Purpose:

Every retailer must ensure customers are more than satisfied with their shopping experience. This aspect is how they retain and attract new customers. Retailers are trying to go beyond the product-oriented approach and offer services in addition to their products regarding retail management software.

A CRM product owner has requested to create two applications, one is a sales app for sales reps to use this application and store customers' data, and the second application is a service app for service reps/agents to provide support to customers in dealing cases. To generate business on top of the customers.

2. Problem Definition & Design Thinking

2.1. Empathy map

EMPATHY MAP FOR RETAIL MANAGEMENT APPLICATION

SAY & DO
What do I say?
What should we keep doing?

TOPIC

Retail Management Application

THINK & FEEL
What do I think about the retail management application?
How do I feel about the application?
What really counts

Comparing online and offline price

Listing pros and cons

Looking for the best price of the desired product

The application is not organized

The options look tempting

Less option of products

Looking for a product that matches our interest

Ordering four products online and using COD

Scrolled for more than an hour before ordering

Same day delivery should be available

Why do the cost and quality of the same product differ from seller to seller

Expecting return/ exchange on the same day

Expecting more discount

Adding products to wishlist and cart

I can see reviews for the products

Checking quality of the product

Refering products online through social media

Receiving the same quality as mentioned in the application

Should I buy this product?

Satisfying

Paid cash to the delivery man

Reviewing the product after delivery

Why don't they provide a refund for the returned products?

Why aren't multiple products ordered on the app delivered on the same day?

HEAR
What do they hear?
What are friends saying?
What are influencers saying?

Appealing slogans

Keep exact change

A vague display of order summary

A display of products along with the pictures

Discounts are on all products

Search engine for searching products and menu bar

option to track delivery

friends informing about the data in price of a desired product

Buy OTP while collecting the product

Delivery man does not have change (cash on delivery mode)

Only cash and UPI options are available for payment

Packaging is neat and eco-friendly

Provide a landmark for the drop location

Influencers recommending the product

Be on the delivery address

Customer service options- call, email or chat

Discounts ranging from 5% to 20%

Various categories for different products

Getting reviews of products from other customers

Reviews for almost all products

Retailers name and logo

Notifications during discounts

SEE
What do I see in the retail management application?
What do I see during the delivery of the product?

PAIN

Extra delivery charges

Overspent

Received refund after 15 days

Scam advertisements

GAIN

Easy comparison of the products

Convenient

Time saving

Platform provides various types of products

2.2. Ideation & Brainstorming Map

3. Result

3.1. Data Model

Application	Object Name	Fields in the Object (Data Type)
Sales App	Campaign	Text
	Leads	Text
	Accounts	Text
	Contacts	Text
	Opportunities	Text
	Products	Text
	Warehouse	Text
	Sales Order	Text
	Dispatch/Training	Text

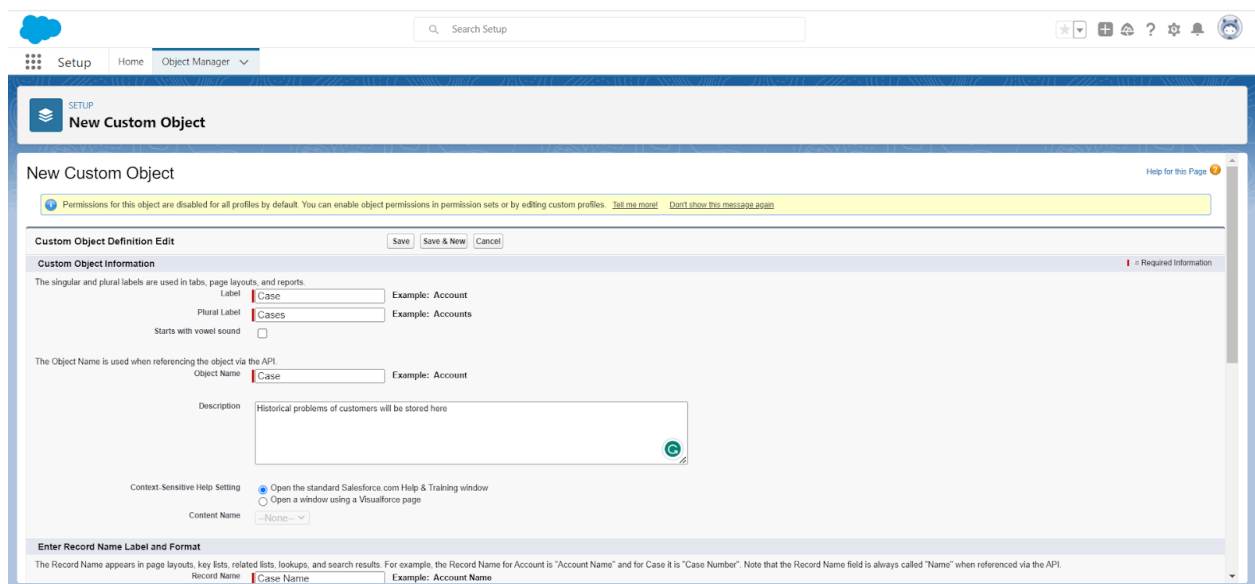| Application	Object Name	Fields in the Object (Data Type)
Service App	Accounts	Text
	Cases	Text

3.2. Activity Screenshot
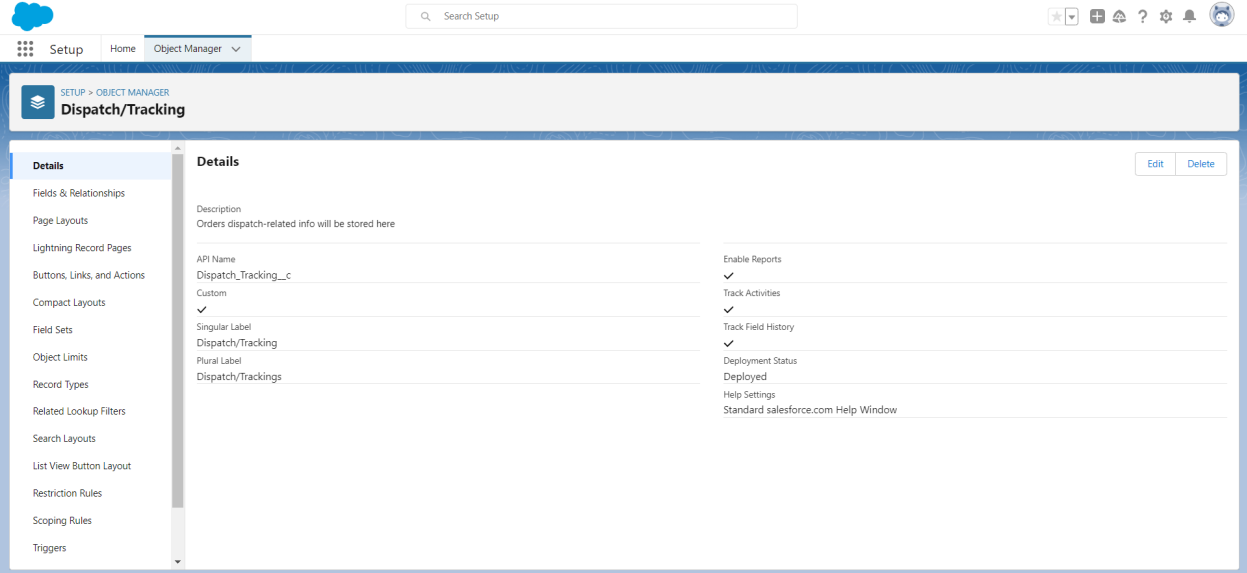
Milestone 1- creating developer's account
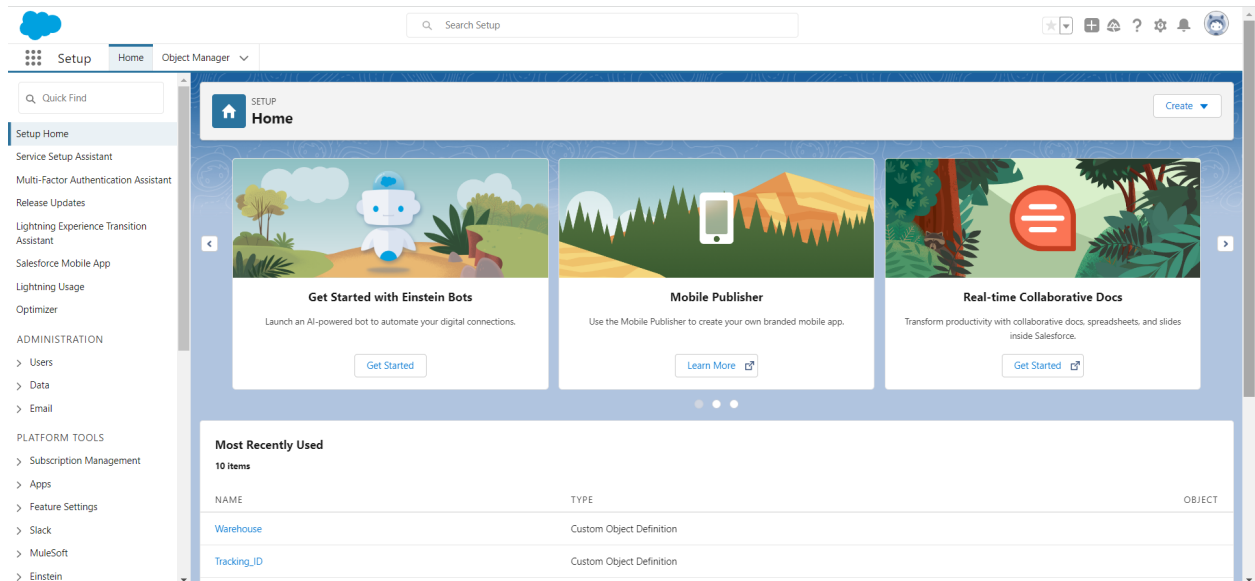
This is the home page that can be seen after logging in to the salesforce application.

Milestone 2- Objects

Creation of object Case
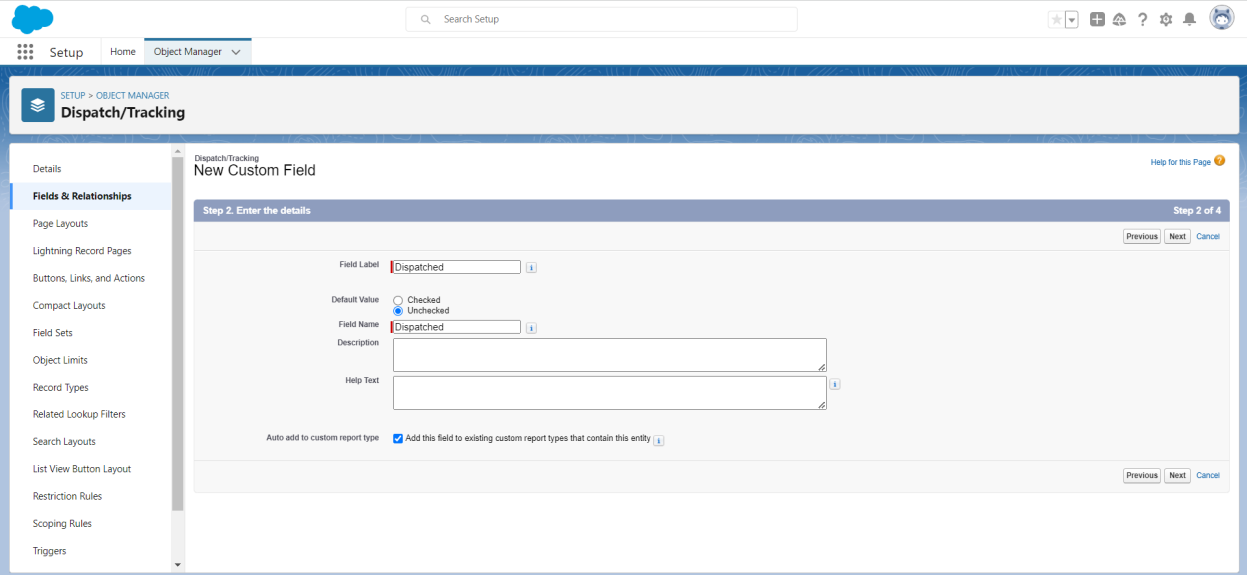
Creation of Object Dispatch/Tracking

Creation of fields on object Dispatch/Tracking

Milestone 3- Relationship between Objects
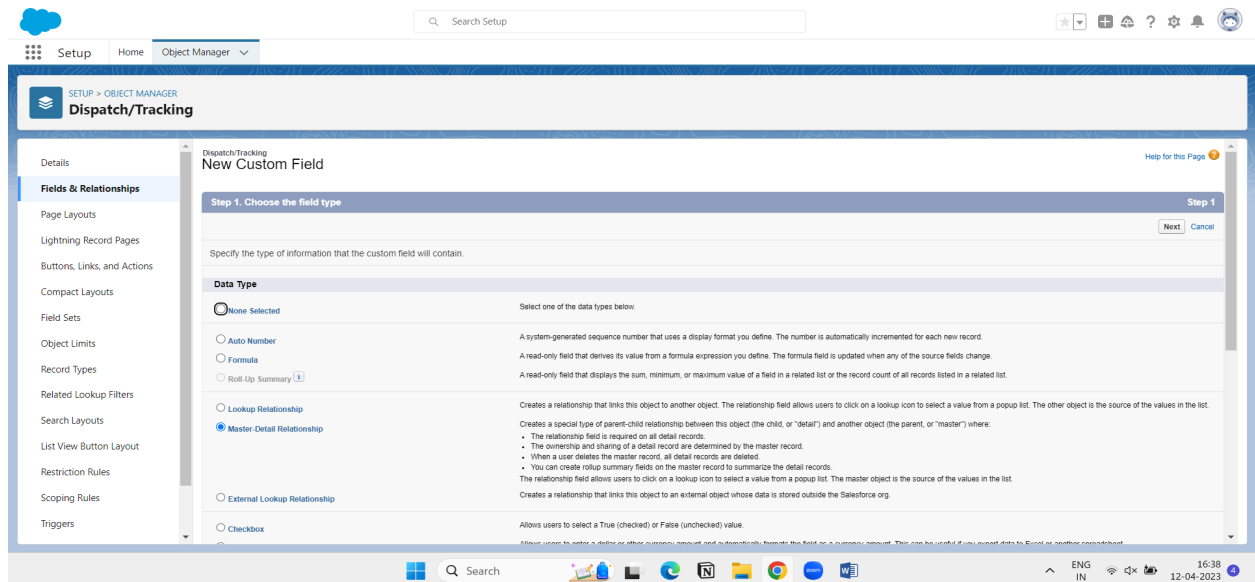
Creation of relationship between Dispatch/Tracking and Sales Order

Milestone 4- Application
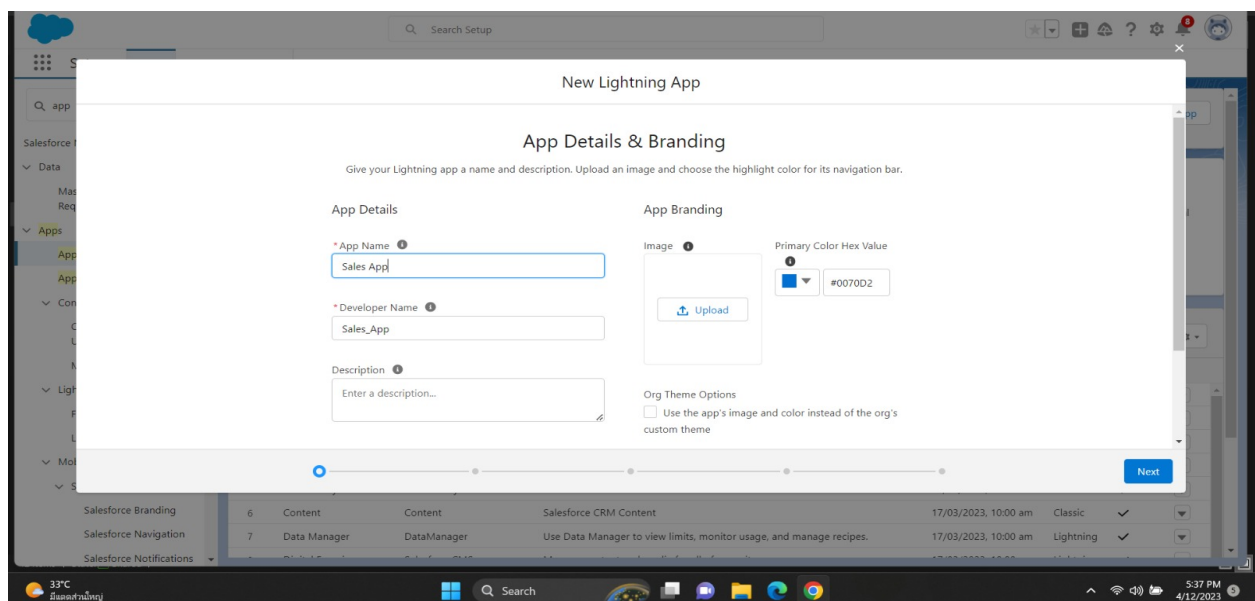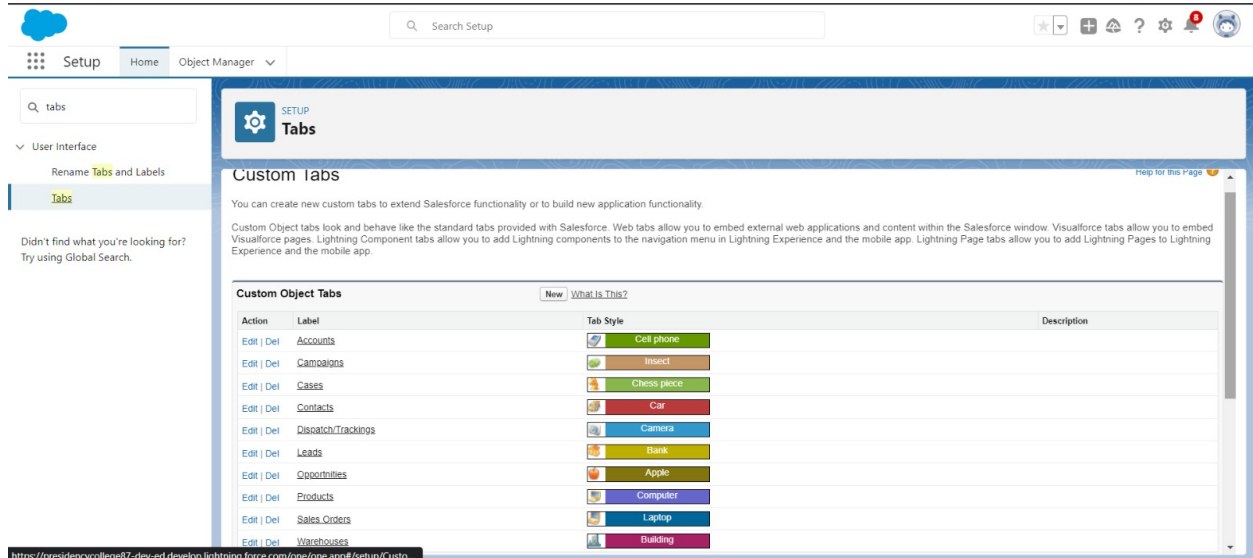

Creation of Sales App
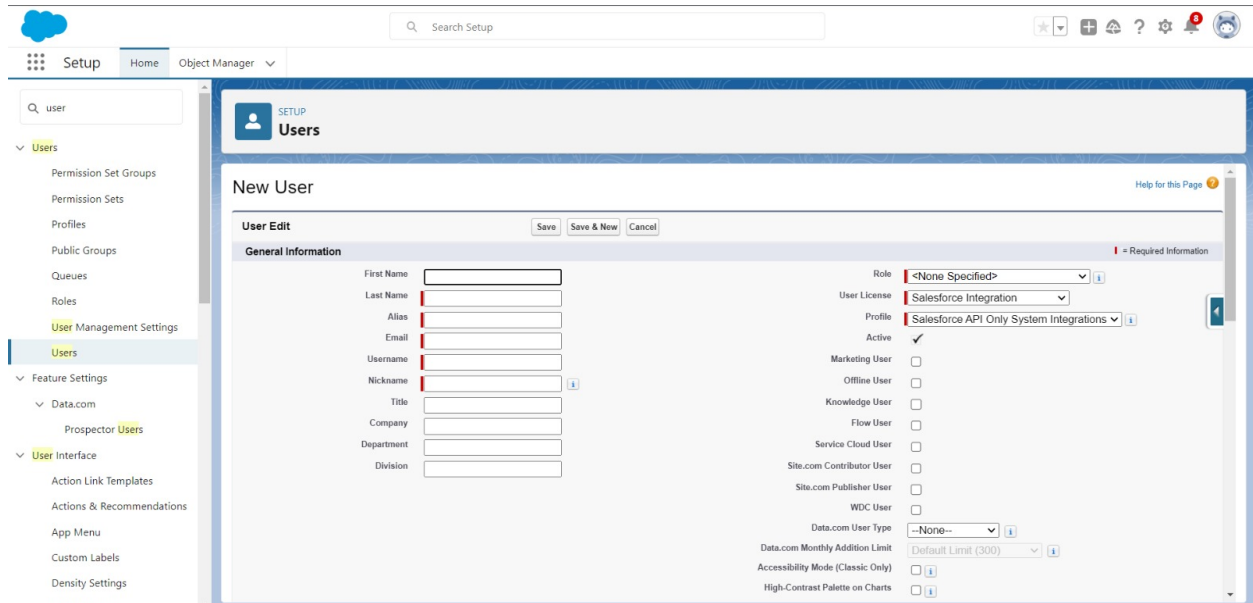
Milestone 5- Layouts

Creation of custom tabs

Milestone 6- User

Creation of user

Milestone 7- Validation Rules

Creation of validation rules for Account object
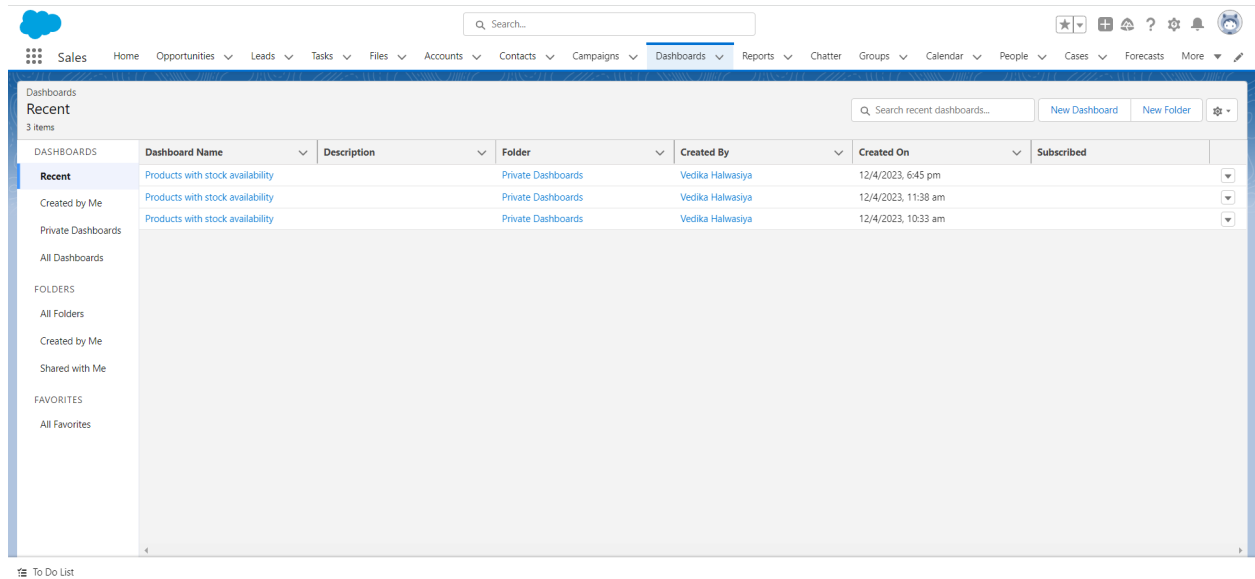
Milestone 8- Reports

Creation of report on warehouse

Milestone 9- Dashboards

Creation of the dashboard for the report

4. Trailhead Profile Public URL

Team Leader: https://trailblazer.me/id/vhalwasiya

Team Member 1:   https://trailblazer.me/id/arakshit18

Team Member 2:   https://trailblazer.me/id/priyadarshinim

Team Member 3:   https://trailblazer.me/id/abasha103

5. Advantages and Disadvantages

Advantages:
- Real-time Visibility And Reports are the Real Benefits of Retail Management Application
- Helps to Improve Business Process Automation
- Retail Management Application helps to Manage Inventory
- Increase referrals from existing customers
- Better Customer Service
- Efficiency increases
- Cost reduction
- Finding a balance among the different practices
- Reduced duplication
- Eliminating conflicting responsibilities
- Performance consistency
- Communication is improved internally and externally
- Management For Retailers
- Merchandise Management Features

Disadvantages:
- A corrupt hard drive, power outage, or technical issue can all lead to a loss of needed data and could potentially shut the entire operation down. At the least, businesses are interrupted when they are unable to access data that is needed.
- A major barrier to the use of the Internet for transactions is **security**. There is a need for a secure electronic transaction that will allow credit card-holder and merchants to authenticate each other during an internet transaction.
- The major issue facing internet retailers is "unfulfillment" or the inability of the business to deliver customer orders accurately. Most deliveries by internet companies contain some errors. Goods ordered for special occasions like Christmas, Diwali, etc., are delivered late.
- In electronic retailing, the visual impact of a website is very important. But it raises conflicts. Graphic and multimedia attributes assume that the customer end has access to a high-specification PC. Customers are frustrated when they experience slow data transfer.

Smart

6. Applications

A customer relationship management (CRM) solution helps you find new customers, win their business, and keep them happy by organizing customer and prospect information in a way that helps you build stronger relationships with them and grow your business faster. CRM systems start by collecting a customer's website, email, telephone, social media data, and more, across multiple sources and channels. It may also automatically pull in other information, such as recent news about the company's activity, and it can store personal details, such as a client's personal preferences on communications. The CRM tool organizes this information to give you a complete record of individuals and companies overall, so you can better understand your relationship over time. A CRM platform can also connect to other business apps that help you to develop customer relationships.
Some applications of Retail Management Application are:
- Inventory control
- Point of Sale (POS)
- Marketing
- Management of customer loyalty

7. Conclusion

As the COVID-19 pandemic has proven, a business's ability to be responsive to external changes can make or break. While some businesses have fallen, others have pivoted and been able to adapt their products or services to reach customers in a different way, garnering a whole new customer base. A few have grown- like e-commerce, logistics, and pharmaceuticals. For all these businesses, it is the customer who is at the center.

Sanjay Gupta, Country Head and VP of Google India has seen a massive adoption of digital and technology in the country. He says, "India is…a low internet penetration country at about 33(%). Rapid digitization will accelerate the numbers. There were 1.34 billion online transactions in June 2020- up 80-90% on the year before."

We know that global automation inevitably affects business. It may seem disturbing, but there is nothing bad about it. Moreover, the introduction of automated assistants excepts the human factor from business processes. Thus, fewer errors occur. Let's be honest, people tend to get tired and inattentive, especially by the end of the working day. So having a helping hand in the form of a retail management system is a great idea for retailers.

8. Future Scope

Not too long ago, many theorized that the Internet would eclipse brick-and-mortar stores. Yet while the Internet has certainly had a tremendous impact on retail, fifteen years after the dot.com craze the brick-and-mortar stores are still in place. In fact, the Internet has proved to be a great extension of brick-and-mortar stores. Most large retailers have embraced the Internet with multi-channel sales strategies, including e-commerce, online advertising, and online product information, specifications, and comparisons.

A retail report cited that over the next decade, consumers will shop closer to home and make more frequent purchases rather than one weekly trip to a big department store. Retail management software is the key to moving forward. When it comes to smaller stores, it's easier for shoppers to find what they need and get out quickly without having to deal with long lines and difficult parking. Granted, the downside of smaller retail stores is that they lack room for a wide breadth of products. But technology is solving this problem. These small retail shops can use the Internet to extend their space. If retailers are able to help customers order products online while they're in the store and have those products shipped to the customer's house, they'll win a lot of business. This is great customer service, but of course, it requires retail management software.

These smaller stores can offer convenience, speed, and personalized customer service without needing to stock every item. However, since shoppers know that the odds of these retailers carrying everything they want are low, store owners and managers need to make the shopping experience convenient, easy, simple, and pleasurable.