

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?

Comparing online and offline price
Listing price and cost
Looking for the best price of the desired product
Looking for a product that matches our interest
Ordering our products online and using COD
Adding products to wishlist and cart
Checking quality of the product
I can see reviews for the products
Paid cash to the delivery man
Referring the product after delivery



Appealing slogan
Keep track change
Discounts are on all products
Be on the delivery address
Friends interacting about the city or price of a desired product
Buy OTP while collecting the product
Provide a landmark for the drop location
Influencers recommending the product
Notifications during discounts
Getting reviews of products from other customers

HEAR

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

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

The application is not organized
The options look confusing
Less option of products
Expecting more discount
Expecting return/exchange on the same day
Should I buy this product?
Why don't they provide a refund for the returned product?
Why aren't more products added in the app delivered on the same day?



Receiving the same quality as mentioned in the application
Same day delivery should be available
Why is the cost and quality of the same product differ from other to other
Search engine for searching products and views for
A vague display of order summary
A display of products along with the pictures
option to track delivery
Only cash and UPI options are available for payment
Packaging is neat and eco-friendly
Customer service options- call, email or chat
Discounts ranging from 5% to 20%
Reviews for similar products
Various categories for different products
Delivery man does not have change (cash on delivery mode)

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

1 Define your problem statement

What problem are you trying to solve? Frame your problem as a how might we statement. This will be the focus of your ideation.

5 minutes

Problem

How might we address a [blank] problem using [blank] technology?

Key rules of brainstorming

Go for quantity not quality.

Don't judge ideas.

Encourage wild ideas.

Build on the ideas of others.

One idea at a time.

Stay on topic.

Focus on the problem.

2 Brainstorm

What ideas do you have that come to mind? Add one idea to your problem statement.

10 minutes

Team Lead	Team Lead	Team Lead	Team Lead	Team Lead	Team Lead	Team Lead	Team Lead	Team Lead	Team Lead
1. How might we use AI to create a more efficient workflow?	2. How might we use AI to create a more efficient workflow?	3. How might we use AI to create a more efficient workflow?	4. How might we use AI to create a more efficient workflow?	5. How might we use AI to create a more efficient workflow?	6. How might we use AI to create a more efficient workflow?	7. How might we use AI to create a more efficient workflow?	8. How might we use AI to create a more efficient workflow?	9. How might we use AI to create a more efficient workflow?	10. How might we use AI to create a more efficient workflow?

3 Group ideas

Take time to group your ideas into clusters or relationships to you go. Group all ideas that have been generated. Give each cluster a name. If a cluster is larger than 10 ideas, try to split it into two smaller sub-groups.

10 minutes

RELATIONSHIP

1. How might we use AI to create a more efficient workflow?

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4 Prioritize

Your team should all be on the same page about what's important, moving forward. Pick your ideas on this grid to determine which ideas are important and which are feasible.

10 minutes

Important

Feasible

1. How might we use AI to create a more efficient workflow?

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3. Result

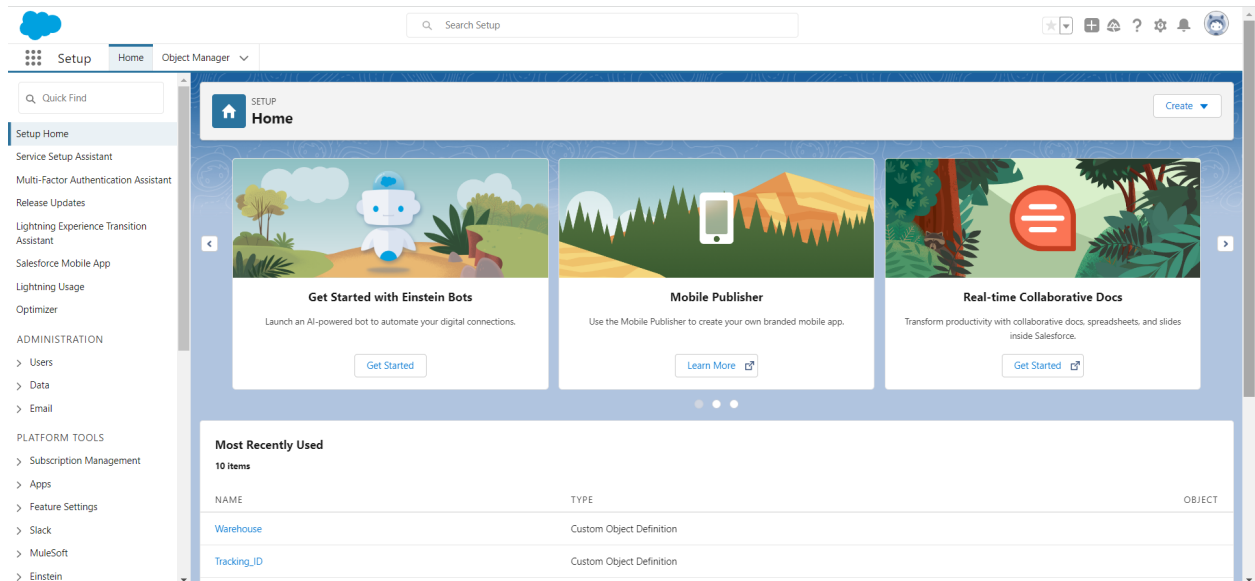
3.1. Data Model

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

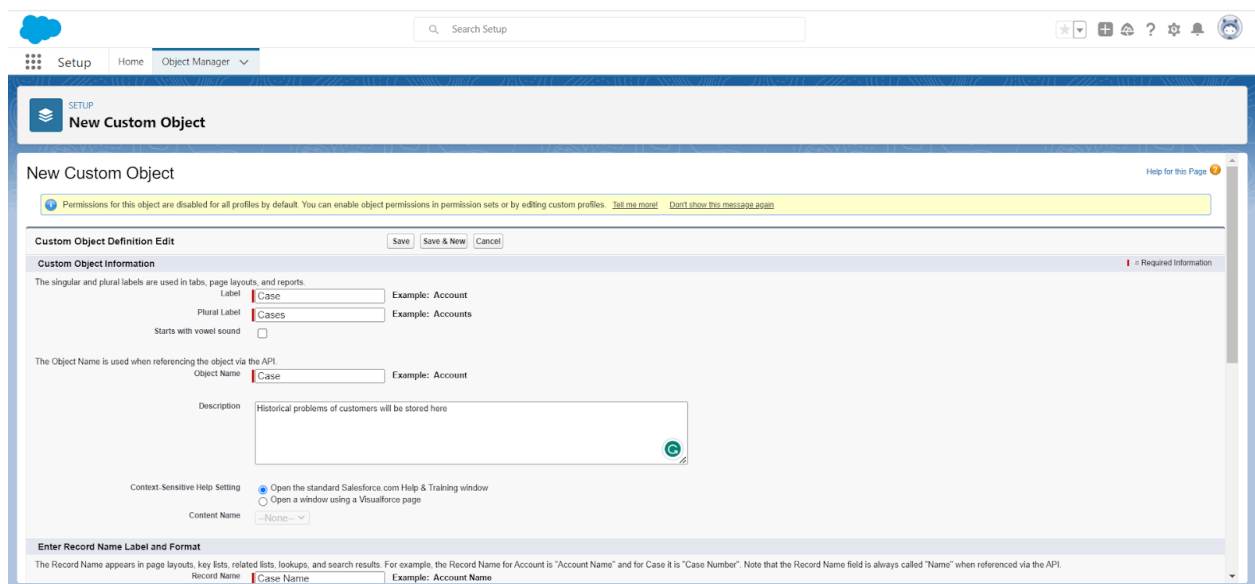
3.2. Activity Screenshot

Milestone 1- creating developer's account

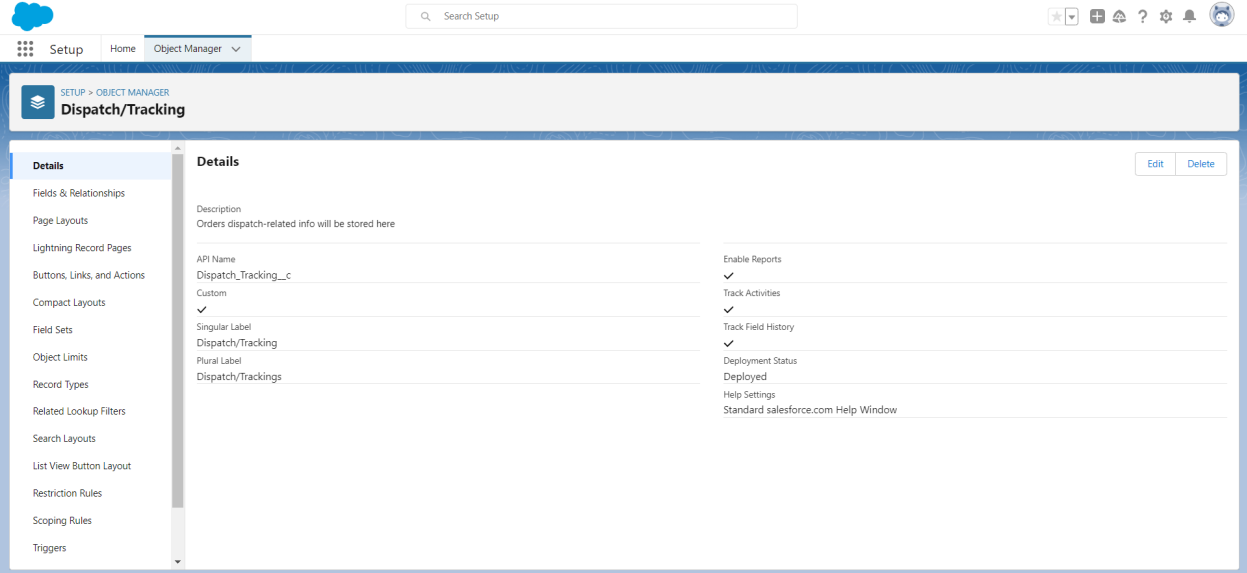


This is the home page that can be seen after logging in to the salesforce application.

Milestone 2- Objects



Creation of object Case



Dispatch/Tracking

Details

Description
Orders dispatch-related info will be stored here

API Name
Dispatch_Tracking__c

Custom
✓

Singular Label
Dispatch/Tracking

Plural Label
Dispatch/Trackings

Enable Reports
✓

Track Activities
✓

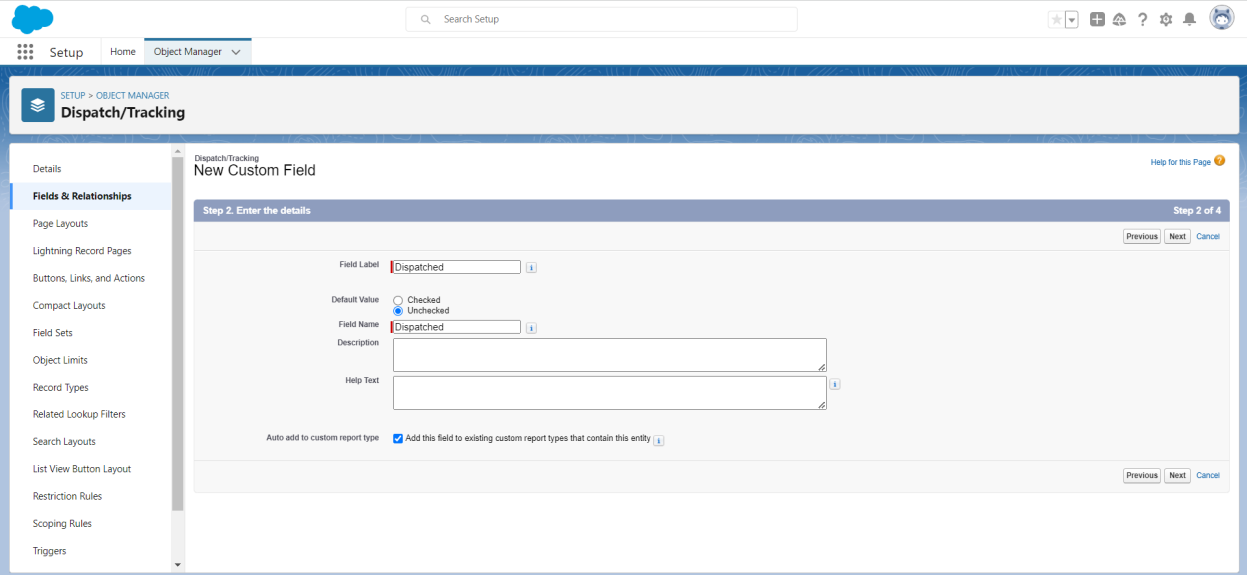
Track Field History
✓

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

[Edit](#) [Delete](#)

Creation of Object Dispatch/Tracking



Dispatch/Tracking

Fields & Relationships

New Custom Field

Step 2. Enter the details

Field Label
Dispatched

Default Value
☐ Checked ☒ Unchecked

Field Name
Dispatched

Description

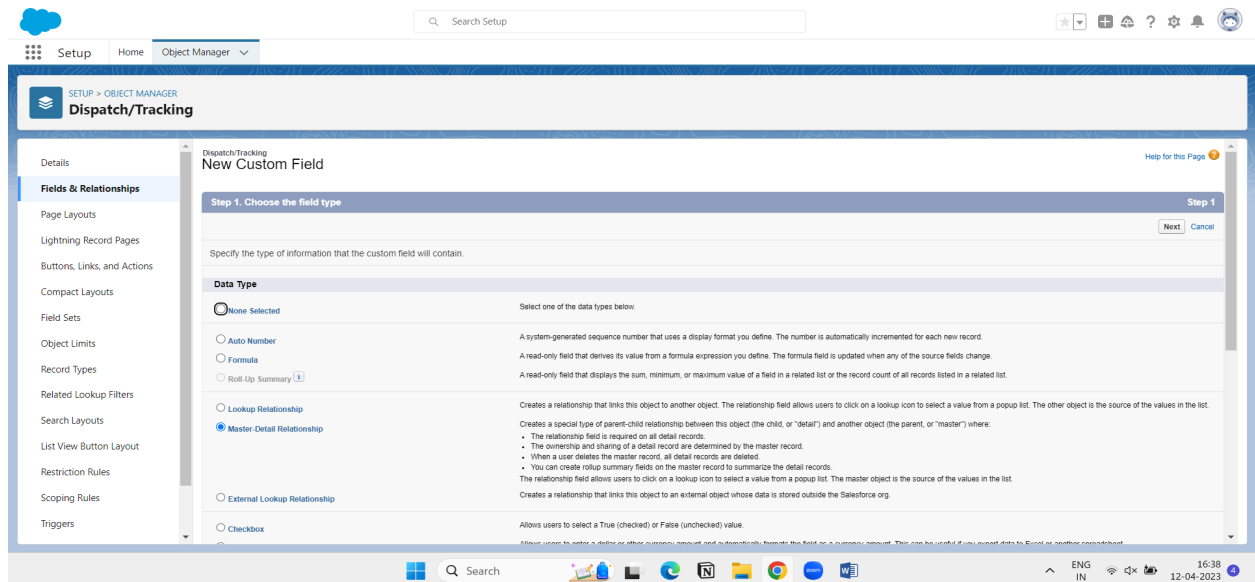
Help Text

Auto add to custom report type ☒ Add this field to existing custom report types that contain this entity

[Previous](#) [Next](#) [Cancel](#)

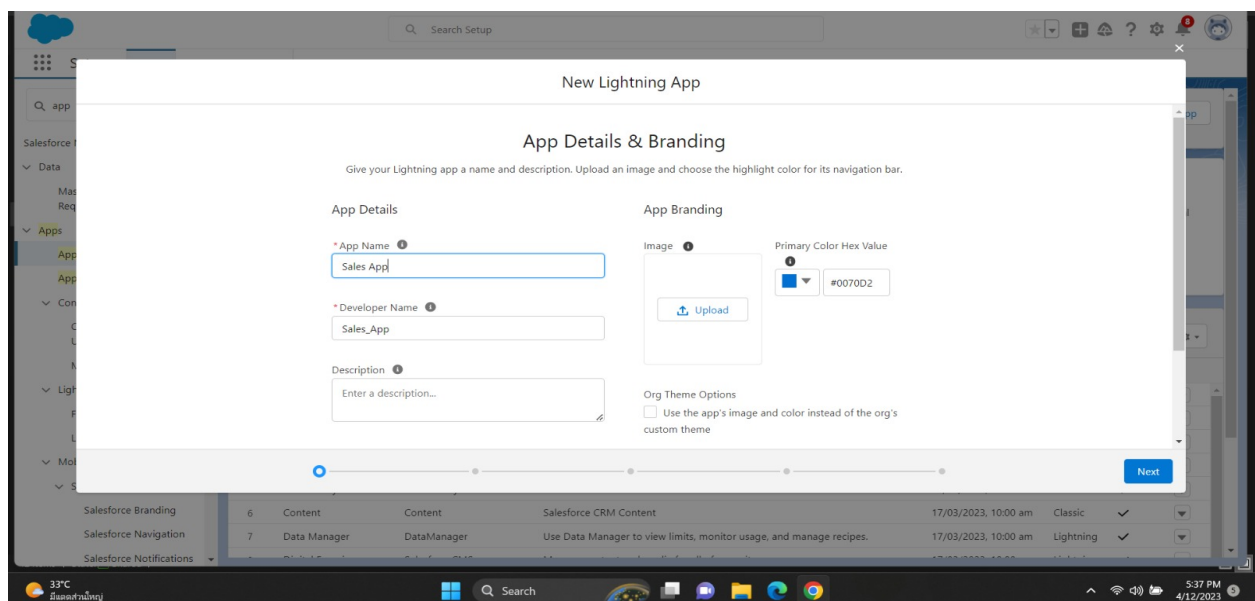
Creation of fields on object Dispatch/Tracking

Milestone 3- Relationship between Objects



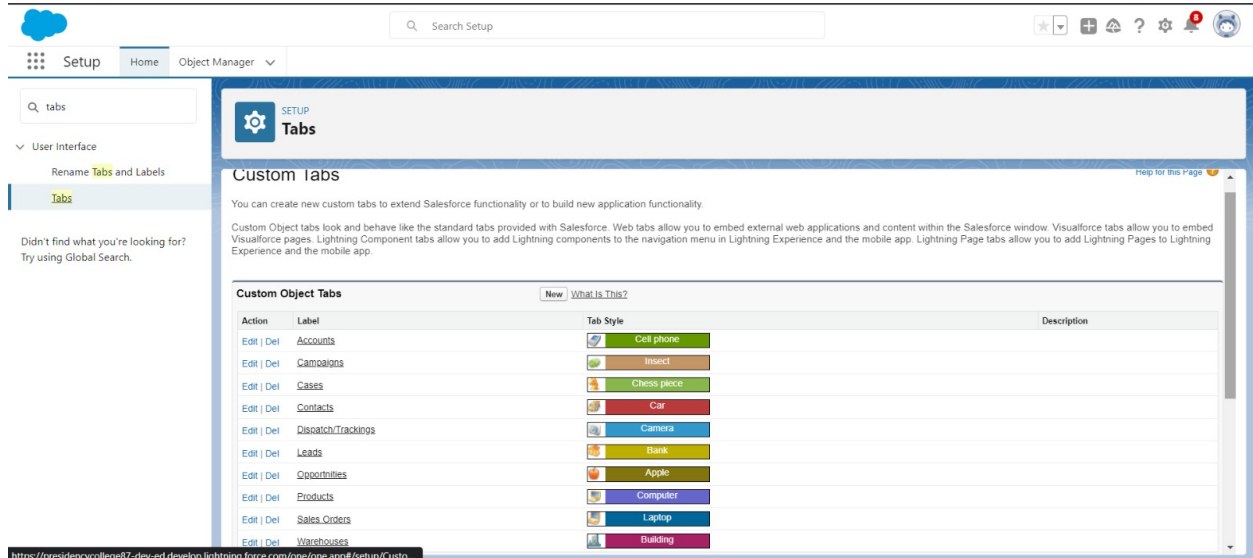
Creation of relationship between Dispatch/Tracking and Sales Order

Milestone 4- Application



Creation of Sales App

Milestone 5- Layouts



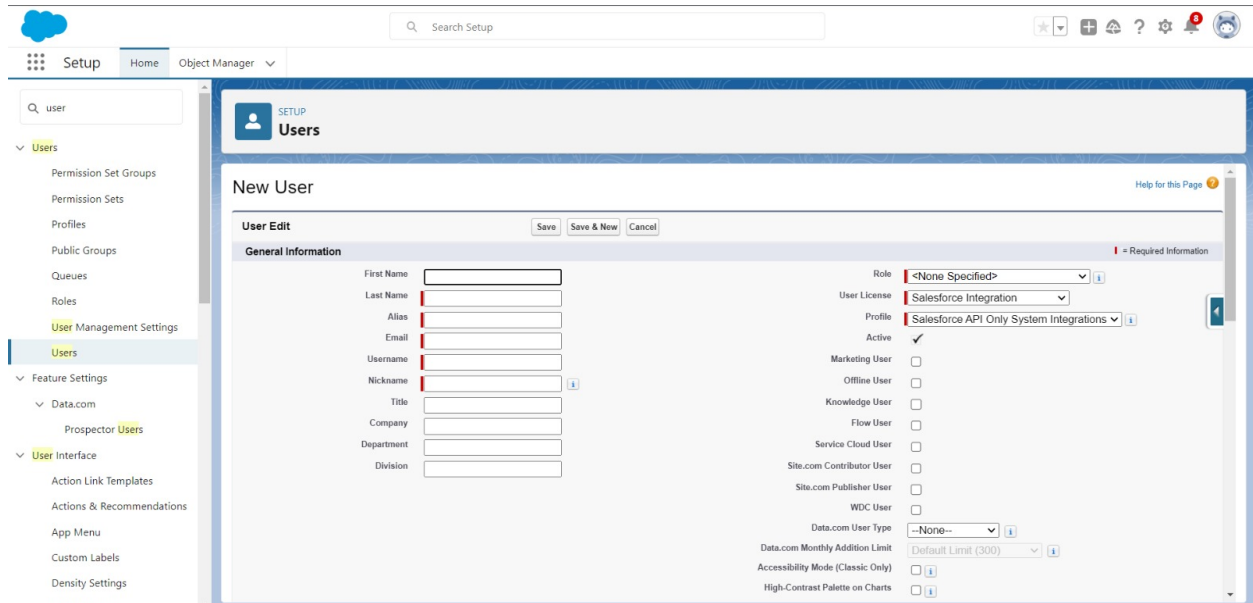
The screenshot shows the Salesforce Setup interface for the 'Custom Tabs' section. The left sidebar contains a search bar with 'tabs' and a list of navigation items under 'User Interface', including 'Rename Tabs and Labels' and 'Tabs'. The main content area is titled 'Custom Tabs' and includes a 'New' button and a 'What is This?' link. Below this is a table of 'Custom Object Tabs' with columns for 'Action', 'Label', 'Tab Style', and 'Description'. The table lists various objects like Accounts, Campaigns, Cases, Contacts, Dispatch/Trackings, Leads, Opportunities, Products, Sales Orders, and Warehouses, each with a corresponding tab style icon and name.

Action	Label	Tab Style	Description
Edit Del	Accounts	Cell phone	
Edit Del	Campaigns	Insect	
Edit Del	Cases	Chess piece	
Edit Del	Contacts	Car	
Edit Del	Dispatch/Trackings	Camera	
Edit Del	Leads	Bank	
Edit Del	Opportunities	Apple	
Edit Del	Products	Computer	
Edit Del	Sales Orders	Laptop	
Edit Del	Warehouses	Building	

https://presidencycollege87-dev-ed.develop.lightning.force.com/one/one.app#/setup/Custom...

Creation of custom tabs

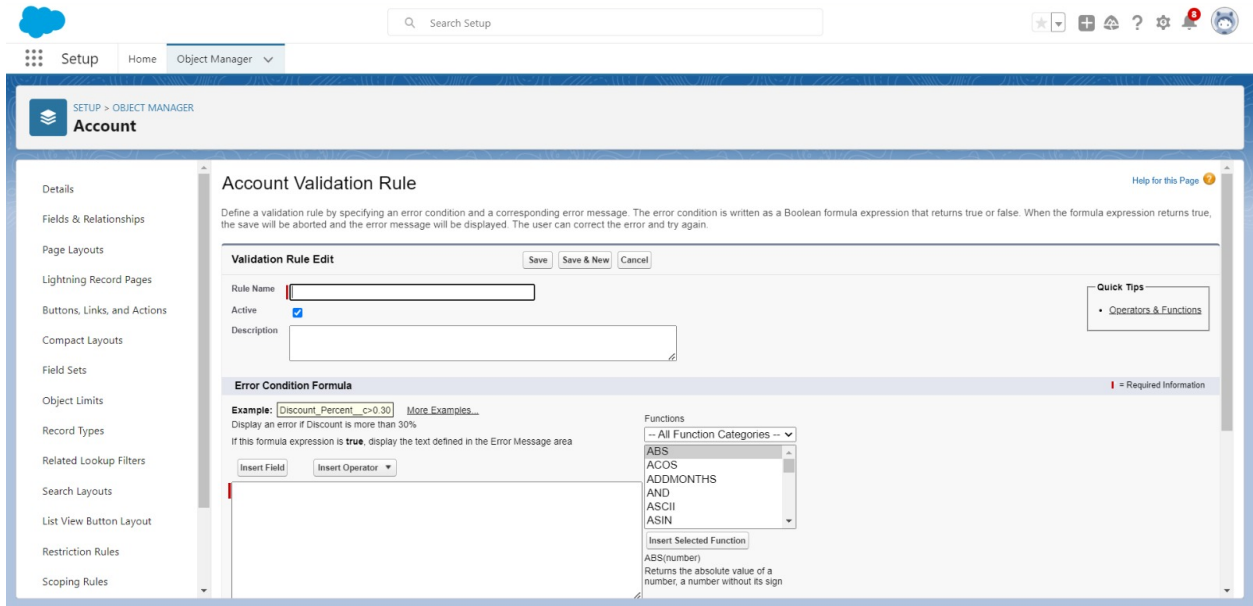
Milestone 6- User



The screenshot shows the Salesforce Setup interface for the 'New User' page. The left sidebar contains a search bar with 'user' and a list of navigation items under 'Users', including 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', and 'Users'. The main content area is titled 'New User' and includes a 'User Edit' section with 'Save', 'Save & New', and 'Cancel' buttons. Below this is a 'General Information' section with fields for 'First Name', 'Last Name', 'Alias', 'Email', 'Username', 'Nickname', 'Title', 'Company', 'Department', and 'Division'. To the right of these fields are dropdown menus for 'Role' (set to '<None Specified>'), 'User License' (set to 'Salesforce Integration'), and 'Profile' (set to 'Salesforce API Only System Integrations'). There are also checkboxes for 'Active', 'Marketing User', 'Offline User', 'Knowledge User', 'Flow User', 'Service Cloud User', 'Site.com Contributor User', 'Site.com Publisher User', and 'WDC User'. At the bottom, there are dropdowns for 'Data.com User Type' (set to '-None-') and 'Data.com Monthly Addition Limit' (set to 'Default Limit (300)'), along with checkboxes for 'Accessibility Mode (Classic Only)' and 'High-Contrast Palette on Charts'.

Creation of user

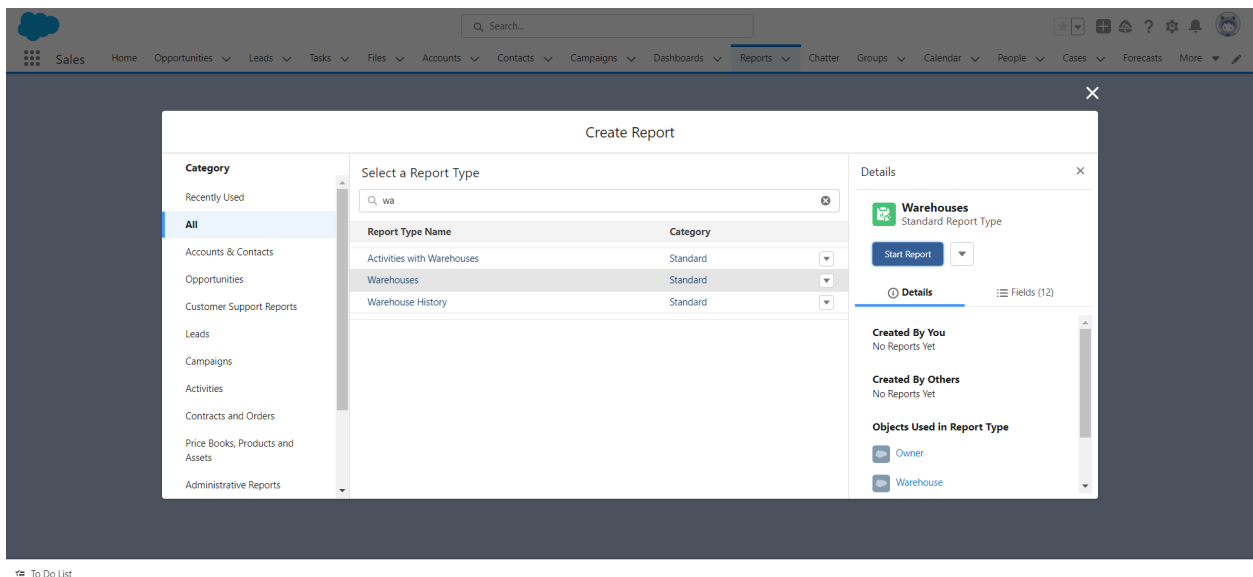
Milestone 7- Validation Rules



The screenshot shows the 'Account Validation Rule' setup page in Salesforce. The page is titled 'Account Validation Rule' and includes a 'Validation Rule Edit' section with fields for 'Rule Name', 'Active' (checked), and 'Description'. Below this is the 'Error Condition Formula' section, which includes an example formula: `Discount_Percent > 0.30`. A 'Functions' dropdown menu is open, showing a list of functions including ABS, ACOS, ADDMONTHS, AND, ASCII, and ASIN. The 'Insert Selected Function' button is visible below the list.

Creation of validation rules for Account object

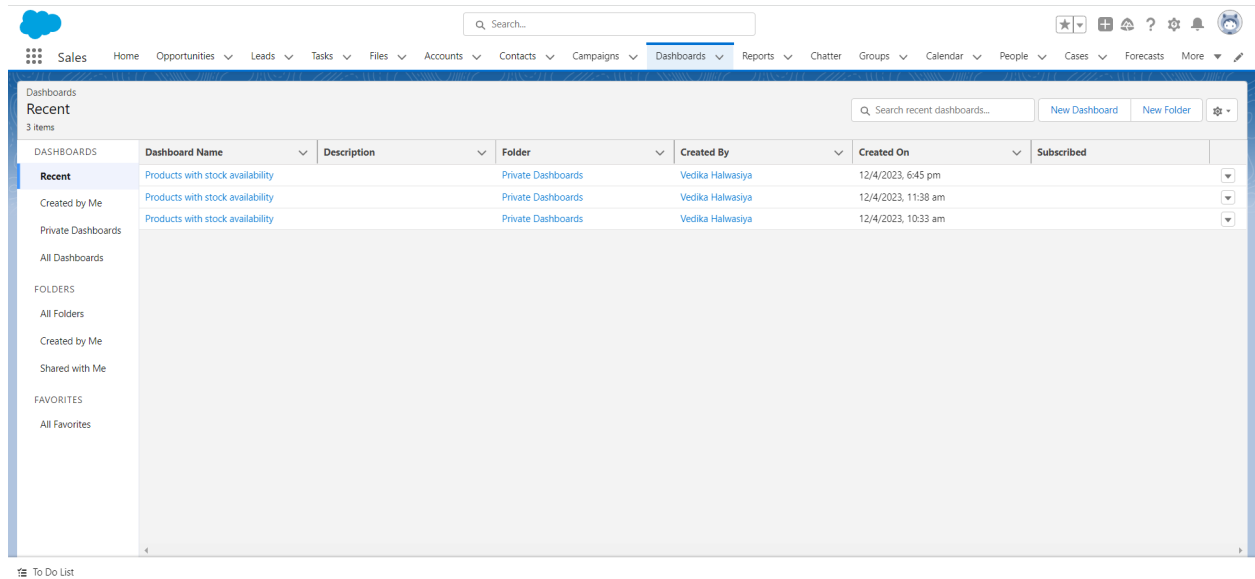
Milestone 8- Reports



The screenshot shows the 'Create Report' dialog in Salesforce. The 'Category' dropdown is set to 'All'. The 'Select a Report Type' section shows a list of report types: 'Activities with Warehouses', 'Warehouses', and 'Warehouse History', all with a 'Standard' category. The 'Details' panel on the right shows the 'Warehouses' report type selected, with a 'Start Report' button and a list of objects used in the report type: 'Owner' and 'Warehouse'.

Creation of report on warehouse

Milestone 9- Dashboards



The screenshot shows the Salesforce Dashboards page. The left sidebar contains navigation links: Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards (selected), Reports, Chatter, Groups, Calendar, People, Cases, Forecasts, and More. The main content area is titled 'Dashboards' and 'Recent' (3 items). It includes a search bar and buttons for 'New Dashboard' and 'New Folder'. A table lists the recent dashboards:

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Products with stock availability		Private Dashboards	Vedika Halwasiya	12/4/2023, 6:45 pm	
Created by Me	Products with stock availability		Private Dashboards	Vedika Halwasiya	12/4/2023, 11:38 am	
Private Dashboards	Products with stock availability		Private Dashboards	Vedika Halwasiya	12/4/2023, 10:33 am	

Below the table, there are sections for 'FOLDERS' (All Folders, Created by Me, Shared with Me) and 'FAVORITES' (All Favorites). At the bottom left, there is a 'To Do List' icon.

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.

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.