Retail Management Using Salesforce
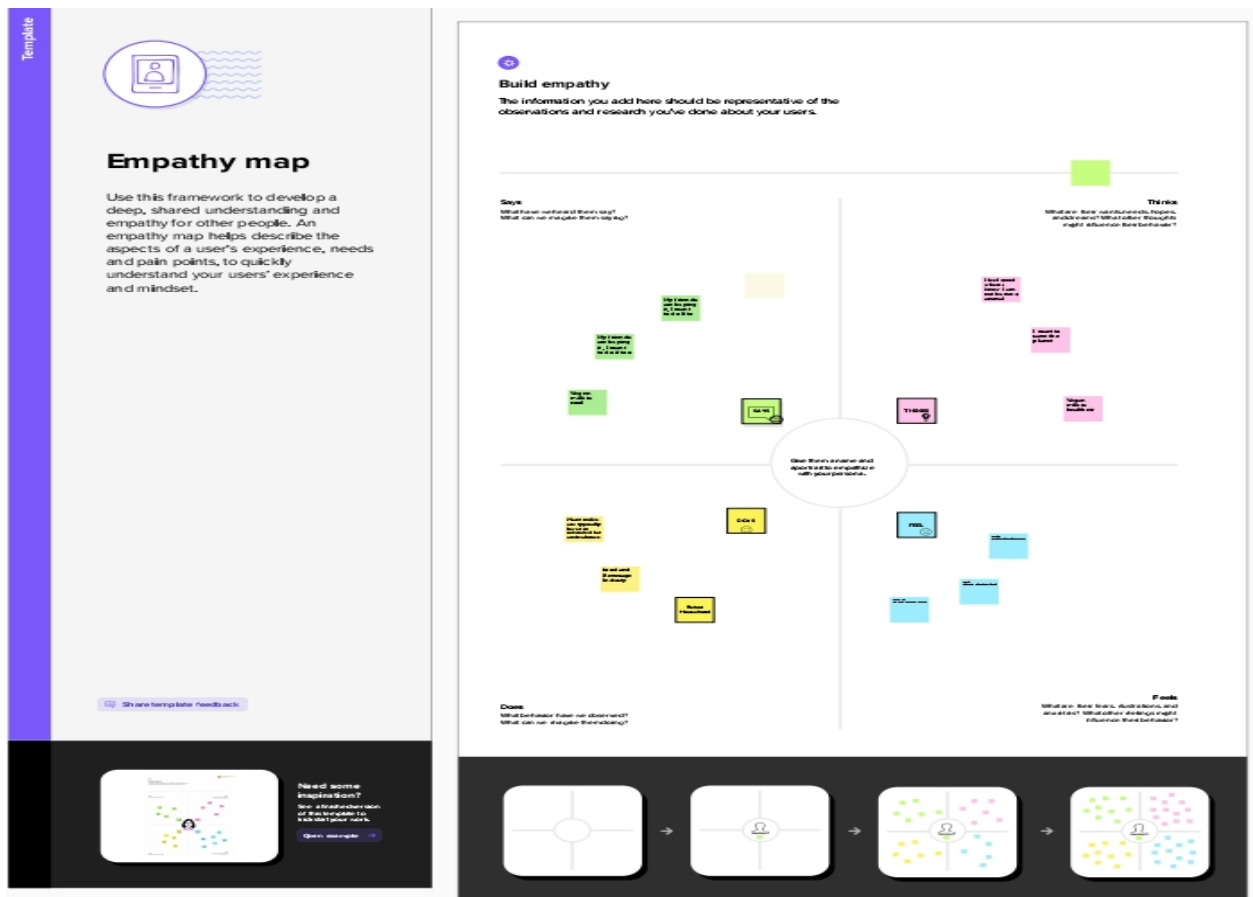
1 INTRODUCTION

1.1 Overview

Retail management using Salesforce is a comprehensive solution that leverages the Salesforce platform to streamline retail operations, manage customer relationships, and drive sales growth. It involves using Salesforce's CRM (Customer Relationship Management) tools to manage customer data, automate sales processes, and provide personalized experiences to customers in the retail industry.

1.2 Purpose

The main purpose of retail management using Salesforce is to empower retailers with powerful CRM tools to manage their end-to-end retail operations. This includes managing customer data, automating sales processes, tracking inventory, managing promotions, and analyzing sales data. The ultimate goal is to enhance customer satisfaction, increase sales, and drive business growth by leveraging the power of Salesforce's CRM capabilities

2 Problem Definition & Design Thinking

2.1 Empathy Map

2.2 Ideation & Brainstorming Map

3 RESULT

3.1 Data Model

Object Name	Field in the object	
Dispatch/Tracking	**Field Label**	**Data Type**
	Dispatched	Checkbox
	Expected Date Of Delivery	Date
	Sales order	Master-Detail(Sales order)
	Tracking ID	Auto Number

3.2 Activity & Screenshot

1. Create Developer Account
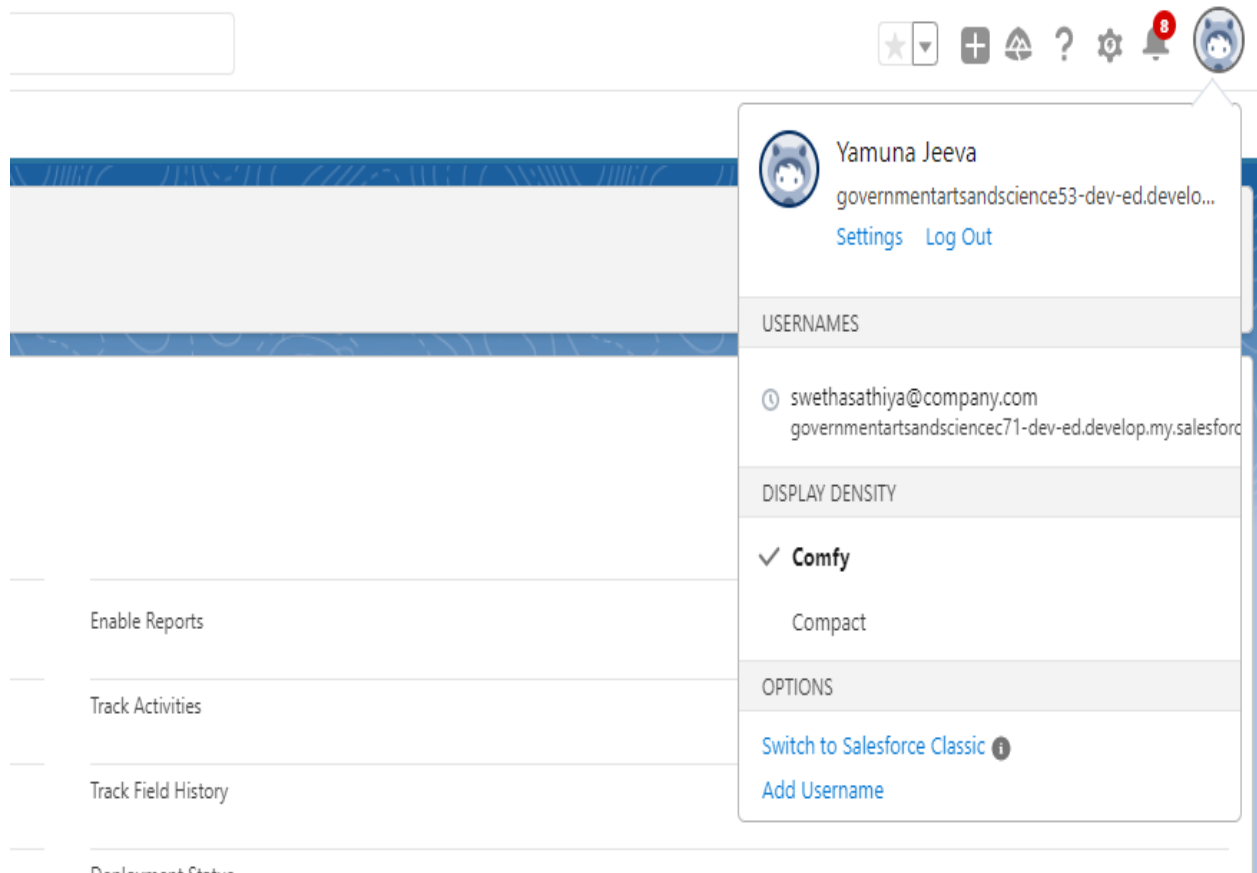
2. Dispatch/Tracking Object

3. Relationship between objects

4. Application Creation\

5. Custom Tab Creation

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the S
components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and t

Custom Object Tabs   New   What Is This?

Action	Label	Tab Style
Edit	Del	Dispatch/Trackings	Phone
Edit	Del	Expected date of delivery	Headset
Edit	Del	Sales orders	Circle
Edit	Del	Tabs	Real Estate Sign
Edit	Del	Trackings	Car

6. User Creation

User
Yamuna Jeeva

Permission Set Assignments [1] | Permission Set Assignments: Activation Required [0] | Permission Set Group Assignments [0] | Permission Set License Assignments [0] | Personal Groups [0] | Public Group Memb
Third-Party Account Links [0] | Installed Mobile Apps [0] | Authentication Settings for External Systems [0] | Login History [10+] |

User Detail   Edit | Sharing | Change Password

Name	Yamuna Jeeva	
Alias	YJeev	Use
Email	yy3658276@gmail.com	
Username	yamunajeeva@company.com	
Nickname	User16766114006091836156 ⓘ	Marke
Title		Of
Company	Government arts and science college for women	Knowle
Department		F
Division		Service Cl
Address	IN	Site.com Contrib
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publis
Locale	English (India)	V
Language	English	Mobile Push Reg

7. Validation Rule Creation

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Account Validation Rule
Back to Account Validation Rules

Validation Rule Detail   Edit | Clone

Rule Name	Phone_Number_Has_International_Format
Error Condition Formula	LEFT(Phone, 1) <> "+"
Error Message	Phone number must begin with + (country code)
Description	
Created By	Yamuna Jeeva, 20/04/2023, 4:48 pm

Edit | Clone

8. Report Creation

Reports
Recent
2 items

REPORTS	Report Name ∨	Description ∨	Folder ∨	Created By
Recent	Warehouses Report		Private Reports	Yamuna Jeeva
Created by Me	New Sales orders Report		Private Reports	Yamuna Jeeva
Private Reports				
Public Reports				
All Reports				
FOLDERS				
All Folders				
Created by Me				
Shared with Me				

9. Dashboard Creation

Dashboards
Recent
1 item

DASHBOARDS	Dashboard Name ∨	Description ∨	Folder ∨
Recent	Products with stock availability		Private Dashboards
Created by Me			
Private Dashboards			
All Dashboards			
FOLDERS			
All Folders			
Created by Me			
Shared with Me			
FAVORITES			

4 Trailhead Profile Public URL

Team Lead - https://trailblazer.me/id/yjeeva3
Team Member 1 - https://trailblazer.me/id/vijimaha
Team Member 2 - https://trailblazer.me/id/vinom36
Team Member 3 - https://trailblazer.me/id/vinop19

5 ADVANTAGES & DISADVANTAGE

Advantages:

1. Enhanced customer relationship management: Salesforce provides a centralized platform to manage customer data, track interactions, and provide personalized experiences. This helps retailers build strong relationships with their customers and improve customer satisfaction.
2. Streamlined sales processes: Salesforce automates sales processes such as lead management, opportunity management, and quote management, which helps retailers streamline their sales operations and increase sales efficiency.
3. Real-time inventory management: Salesforce allows retailers to track and manage inventory in real-time, ensuring accurate inventory levels, reducing stockouts, and improving order fulfillment.
4. Data-driven decision-making: Salesforce provides powerful analytics and reporting tools that enable retailers to gain insights from their sales data, customer data, and inventory data. This helps in making informed business decisions and driving sales growth.

Disadvantages:

1. Cost: Implementing Salesforce for retail management can be expensive, especially for small and medium-sized retailers with limited budgets.
2. Complexity: Salesforce is a complex platform with a steep learning curve, which may require significant training and expertise to effectively use all its features.
3. Customization limitations: While Salesforce offers a wide range of customization options, some advanced customizations may require technical expertise, and certain limitations may exist in terms of customization flexibility.

6 APPLICATIONS

1. Fashion and apparel: Managing inventory, tracking customer preferences, and providing personalized recommendations for fashion and apparel retailers.
2. Electronics and appliances: Automating sales processes, managing warranties, and tracking product inventory for electronics and appliances retailers.
3. Grocery and supermarkets: Managing loyalty programs, tracking inventory, and automating order fulfillment for grocery and supermarket retailers.

7 CONCLUSION

Retail management using Salesforce offers a powerful and comprehensive solution for retailers to manage their operations and customer relationships. It enables retailers to enhance customer satisfaction, streamline sales processes, and drive sales growth through data-driven decision-making. However, it is important to carefully consider the costs, complexity, and customization limitations associated with Salesforce implementation.w

8 FUTURE SCOPE

Promising, as the retail industry continues to evolve with changing customer expectations and market dynamics. With advancements in artificial intelligence, machine learning, and data analytics, Salesforce can further enhance its capabilities to provide more advanced and predictive insights for retailers. Additionally, as Salesforce continues to innovate and expand its platform, there may be more industry-specific features and functionalities tailored for the retail sector, offering even more value to retailers in the future.