

Retail Management Using Salesforce

1 INTRODUCTION

1.1 Overview

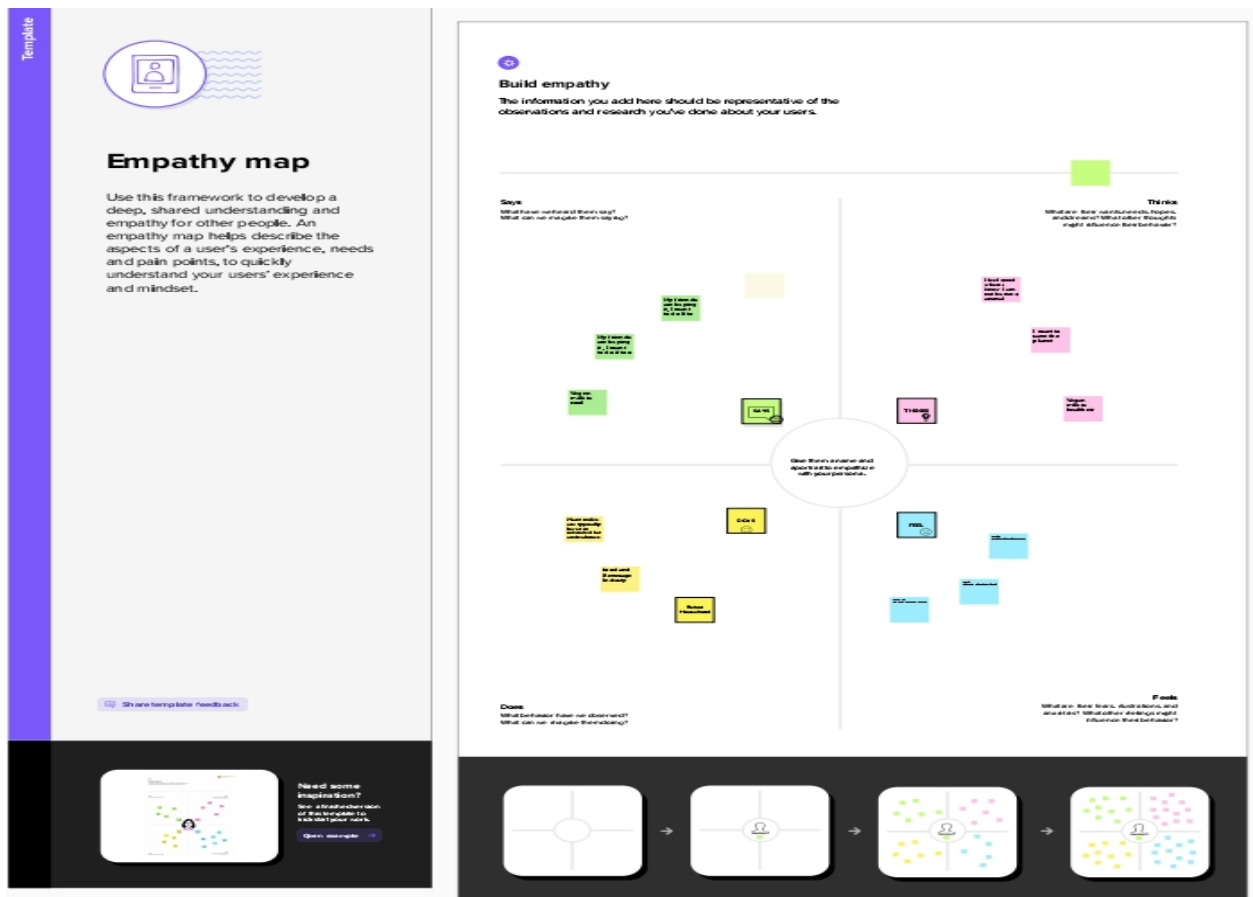
Retail management using Salesforce is a comprehensive solution that leverages the Salesforce platform to streamline retail operations, manage customer relationships, and drive sales growth. It involves using Salesforce's CRM (Customer Relationship Management) tools to manage customer data, automate sales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

Brainstorm & idea prioritization

Use the template in your own brainstorming sessions so your team can unleash their imagination and start shaping concepts even if you're not staying in the same room.

- All team ideas possible
- Filter & re-evaluate
- Add progress notes to a grid

• [View template details](#)

Before you collaborate

It takes a lot of people time to get a meeting together. So make the most of your time and get the most out of your session.

- [View details](#)

Define your problem statement

Take a few minutes to define your problem statement. This will help you to focus your ideas and make sure you are all on the same page.

- [View details](#)

Brainstorm

Use the template to brainstorm ideas. This will help you to generate a large number of ideas and make sure you are all on the same page.

- [View details](#)

Brainstorming map

A template for brainstorming ideas. It includes a central box for the problem statement and several surrounding boxes for brainstorming ideas.

• [View details](#)

Brainstorming map

A template for brainstorming ideas. It includes a central box for the problem statement and several surrounding boxes for brainstorming ideas.

• [View details](#)

Group ideas

Take time to group your ideas into categories. This will help you to see the big picture and make sure you are all on the same page.

- [View details](#)

Prioritize

Take time to prioritize your ideas. This will help you to see the big picture and make sure you are all on the same page.

- [View details](#)

After you collaborate

Take time to reflect on your session. This will help you to see the big picture and make sure you are all on the same page.

- [View details](#)

Group ideas

A template for grouping ideas. It includes a central box for the problem statement and several surrounding boxes for brainstorming ideas.

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Prioritize

A template for prioritizing ideas. It includes a central box for the problem statement and several surrounding boxes for brainstorming ideas.

• [View details](#)

After you collaborate

A template for reflecting on your session. It includes a central box for the problem statement and several surrounding boxes for brainstorming ideas.

• [View details](#)

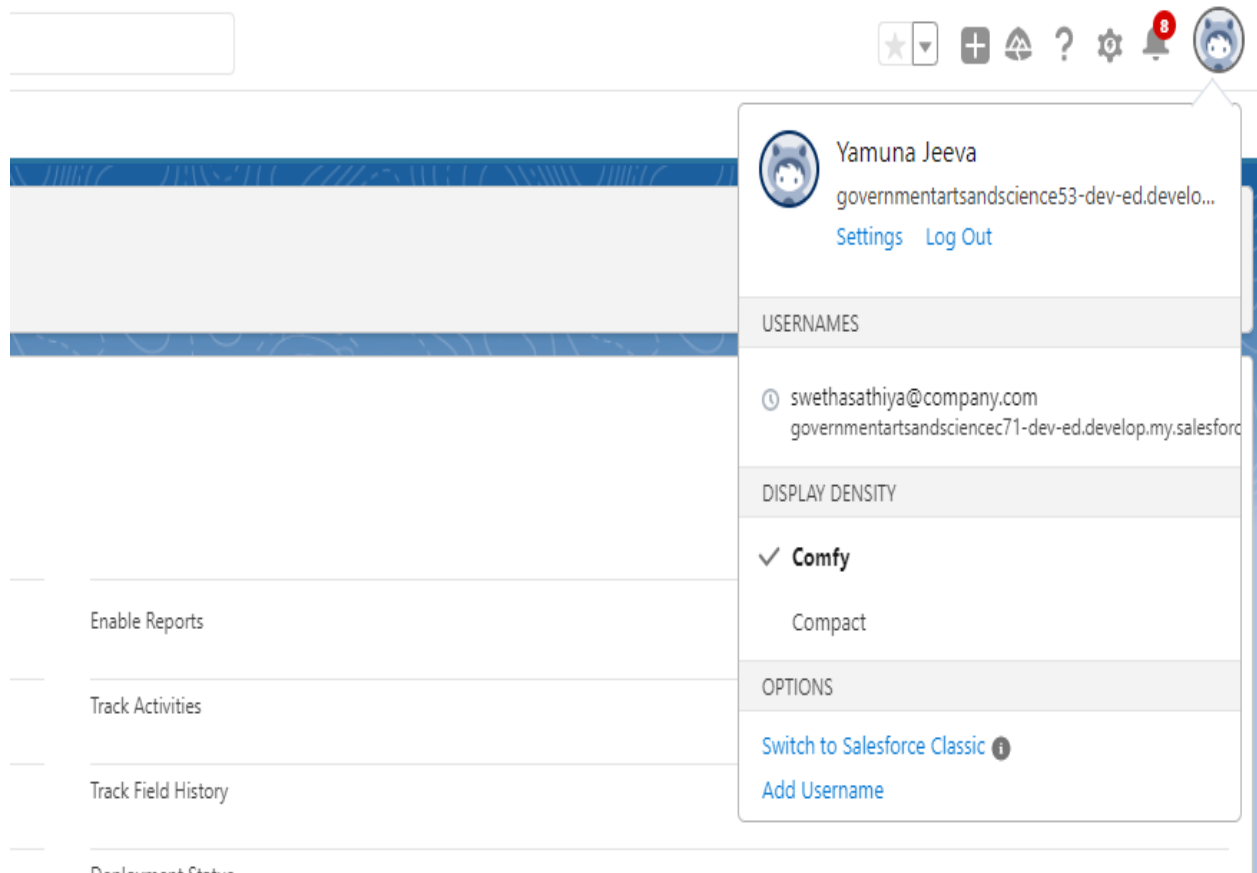
3 RESULT

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



Details

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters

Details

Description

API Name

Dispatch_Tracking__c

Custom



Singular Label

Dispatch/Tracking

Plural Label

Dispatch/Trackings

3. Relationship between objects



Details

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout

Fields & Relationships

7 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME
Created By	CreatedById
Dispatched	Dispatched__c
Expected Date Of Delivery	Expected_Date_Of_Delivery__c
Last Modified By	LastModifiedById
Sales order	Sales_order__c
Tracking id	Tracking_id__c
Tracking ID	Name

4. Application Creation\



Sales

Home

Opportunities

Leads

Tasks

Files

Accounts

Contacts

Campaigns

Dashboards

Reports

Quarterly Performance

CLOSED ₹0

OPEN (>70%) ₹0

GOAL --



Add the opportunities you're working on, then come back here to view your performance.

Closed

Goal

Closed + Open (>70%)

Today's Events



Today's Tasks



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 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 the mobile app.


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



SETUP

Users

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 Membership \[0\]](#) |
 [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	User
Email	yy3658276@gmail.com	
Username	yamunajeeva@company.com	
Nickname	User16766114006091836156 	Marked
Title		Of
Company	Government arts and science college for women	Knowle
Department		f
Division		Service CI
Address	IN	Site.com Contrib
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Public
Locale	English (India)	V
Language	English	Mobile Push Reg

7. Validation Rule Creation



SETUP > OBJECT MANAGER

Account

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

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.