

Retail Management Application Using Salesforce

1. Introduction

Retail management refers to the process of helping customers find products in your store. It includes everything from increasing your customer pool to how products are presented, and how you fulfill a customer's needs. A good store manager helps customers leave the store with a smile.

1.1 Overview

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers. Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

1.2 Purpose

Salesforce can be used to manage customer data, automate processes, and improve customer relationships. Businesses can use Salesforce to save time and money while improving customer relationships.

2. Problem Definition & Design thinking

2.1 Empathy Map



SAYS :

"I want to be able to easily manage my inventory and track sales in real time .I need a solution that is user friendly and intuitive

THINKS :

"I don't want to spend a lot of time on administrative tasks I need a system that can automate some of these processes and make my life easier .I also want to be able to access my data from anywhere, at any time'.

DOES :

Manages inventory tracks sales, generates reports, updates customer information ,and communicates employees.

FEELS :

Frustrated with current manual process and inefficiencies, stressed about keeping up with inventory and sales. Excited about the potential benefits of using a retail management application that can streamline operations and improve overall efficiency.

2.2 Ideation & Brainstorming Map



1. Customer Management :

- Capture and manage customer data, including personal information, purchase history, and preferences.
- Create customer profiles to track their interactions with the business.
- Use customer data to create personalized marketing campaigns and offers.

2. Sales Management :

- Manage sales data, including sales orders, invoices, and receipts.
- Track sales performance by product, location, and salesperson.
- Use data analytics to identify trends and optimize sales strategies.
- Generate reports to evaluate sales performance and profitability.

3. Inventory Management :

- Track inventory levels and movements across multiple locations.
- Monitor product availability and create purchase orders as needed.

4. Point of Sale (POS) :

- Use Salesforce's POS system to process sales transactions.
- Accept payments through various channels, including credit cards, mobile payments, and gift cards.
- Manage returns, refunds, and exchanges.

5. Marketing Automation :

- Automate marketing campaigns based on customer behavior and preferences.
- Analyze campaign performance and adjust marketing strategies as needed

6. Customer Service :

- Use Salesforce's customer service tools to provide support to customers.
- Create support tickets to track customer issues and resolutions.
- Manage customer feedback and reviews.

7. Analytics and Reporting :

- Use Salesforce's reporting and analytics tools to generate insights into sales, marketing, and customer data.
- Customize dashboards and reports to track key performance indicators (KPIs) and monitor business performance.

3. Result

3.1 Date Model

Object Name	Fields in the Object	
1.Account	Field label	Data Type
	Account	Text
2.Warehouse	Field label	Data Type
	Warehouse	Text
3.Student	Field label	Data Type
	Student	Text
4.parent	Field label	Data Type
	Parent	Text

3.2 Activity & Screenshot

MILESTONE-1

Activity-1 Creating Developer Account Creating a developer org in salesforce

1. Go to developers.salesforce.com
2. Click on sign up.
3. On the sign up form, enter the details : .

Developer Edition Signup | Salesforce

Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.

Build enterprise-quality apps fast to bring your ideas to life

- Build apps fast with drag and drop tools
- Customize your data model with clicks
- Go further with Apex code
- Integrate with anything using powerful APIs
- Stay protected with enterprise-grade security
- Customize UI with clicks or any leading-edge web framework

First Name* P

Last Name* Yukeswaran

Email* pyukeswaran7815@gmail.com

Role* Developer

Company* yukes IT

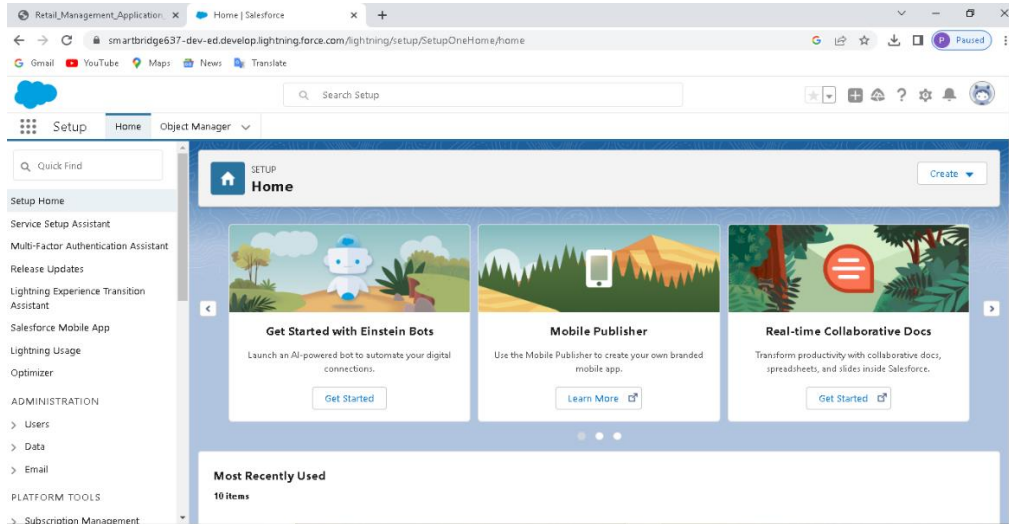
Country/Region* India

Postal Code* 621 316

Paused

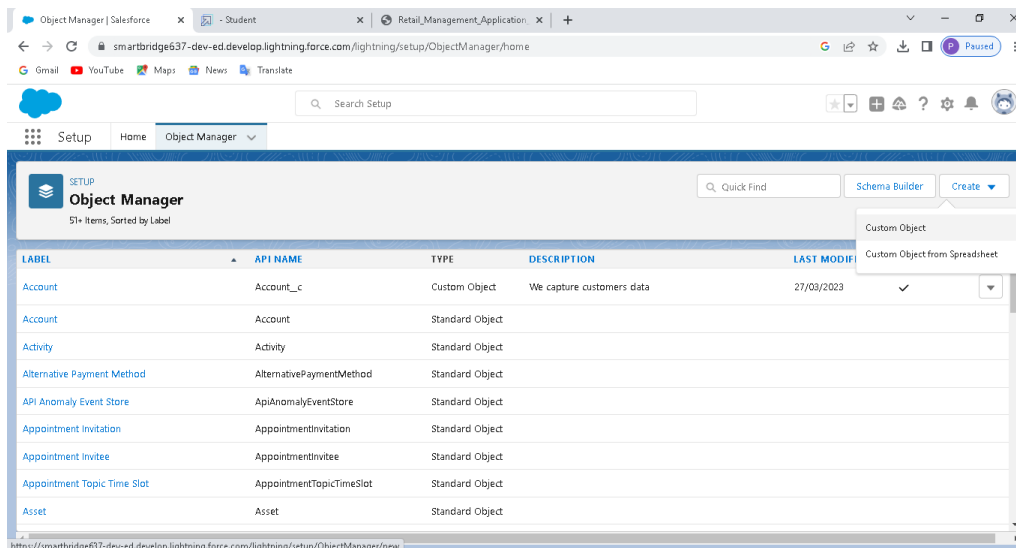
Login To Your Salesforce Account

- 1.Go to salesforce.com and click on login.
- 2.Enter the username and password that you just created.
- 3.After login this is the home page which you will see.

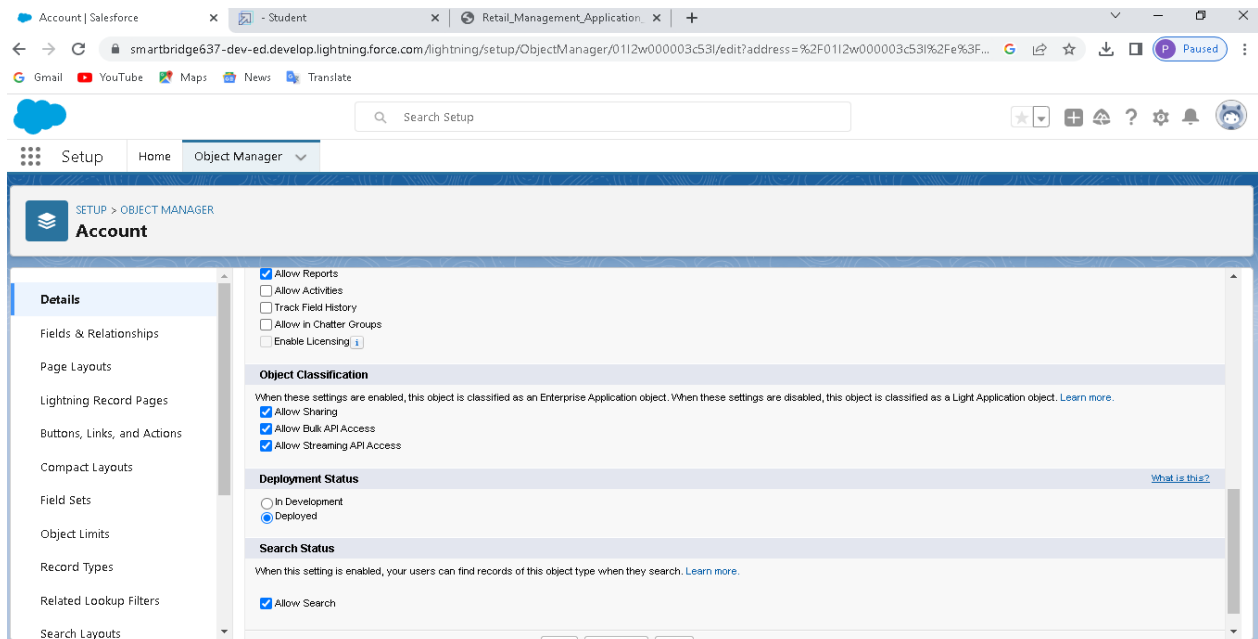


MILESTONE-2 OBJECTS

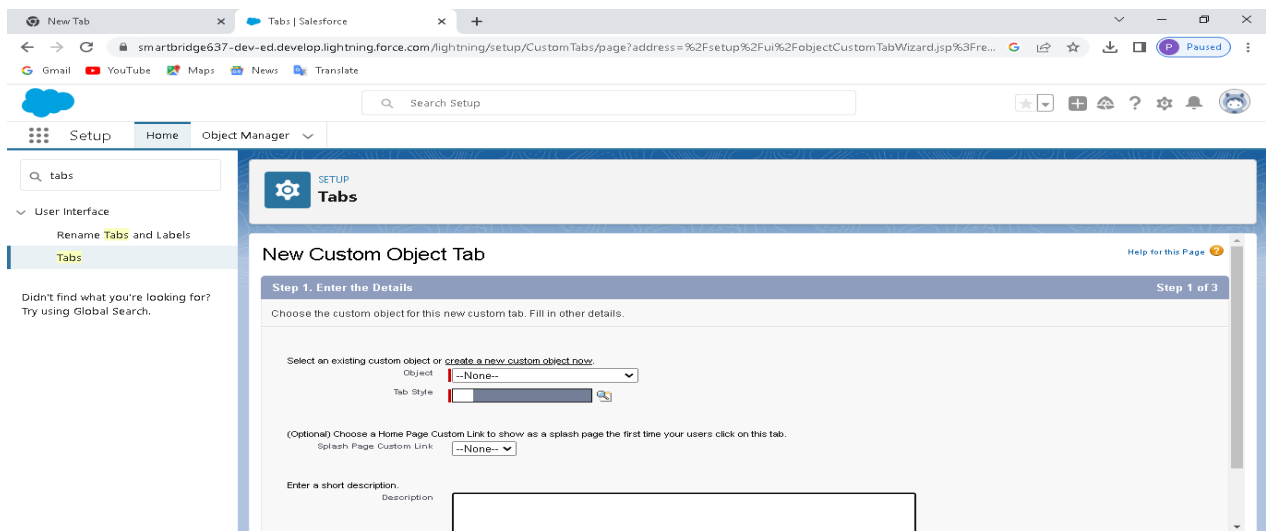
Select the object manager and Create custom object



- 1.you have to give the object name.
- 2.The label name has Account and Plural label has Accounts
- 3.And the data type has text.
4. In deployment status select deployed option.



Click on next



Click on next and save

ACTIVITY-2 Fields available on Account

The screenshot shows the Salesforce Setup interface for the 'Account' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Fields & Relationships' and shows a list of 6 items, sorted by Field Label. The table below lists the fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Account	Account__c	Checkbox		
Account name	Name	Text(80)		✓
Accounts	Accounts__c	Checkbox		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
sales order	sales_order__c	Master-Detail(Order)		✓

Select the data type ,checkbox has a type

The screenshot shows the 'New' page for creating a new field for the 'Account' object. The left sidebar is the same as the previous screenshot. The main content area is titled 'Fields & Relationships' and shows a list of data types to choose from. The 'Checkbox' option is selected.

☐ Lookup Relationship
Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

☐ Master-Detail Relationship
Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

☐ External Lookup Relationship
Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

☒ Checkbox
Allows users to select a True (checked) or False (unchecked) value.

☐ Currency
Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

☐ Date
Allows users to enter a date and pick a date from a popup calendar.

☐ Date/Time
Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.

☐ Email
Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

☐ Geolocation
Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

☐ Number
Allows users to enter any number. Leading zeros are removed.

And label name has Account

The screenshot shows the Salesforce Setup interface for creating a new field. The left sidebar lists various setup options, with 'Fields & Relationships' selected. The main content area is titled 'Step 2. Enter the details' and contains the following fields:

- Field Label:** Account
- Default Value:** Unchecked (selected)
- Field Name:** Account
- Description:** (empty text box)
- Help Text:** (empty text box)
- Auto add to custom report type:** Add this field to existing custom report types that contain this entity (checked)

Navigation buttons at the bottom right include 'Previous', 'Next', and 'Cancel'.

Select the next option and save it.

MILESTONE-3

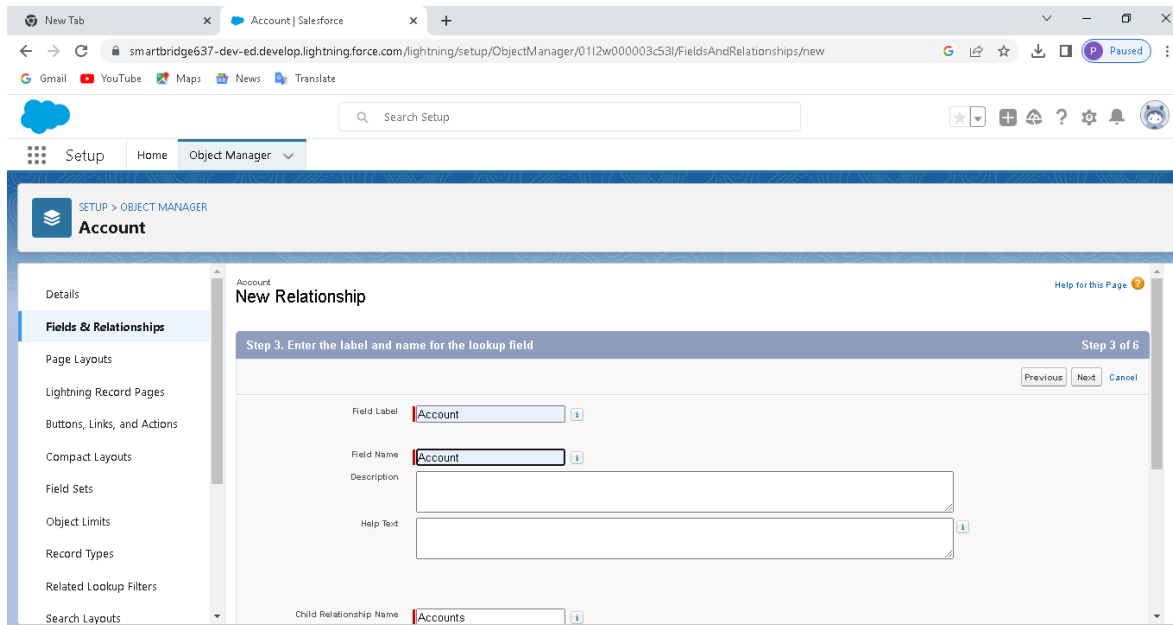
Activity-1 Creation of relationships between objects

The screenshot shows the Salesforce Setup interface for selecting a relationship type. The left sidebar lists various setup options, with 'Fields & Relationships' selected. The main content area is titled 'Step 3. Select a relationship type' and contains the following options:

- ☐ Lookup Relationship
- ☒ Master-Detail Relationship
- ☐ External Lookup Relationship
- ☐ Checkbox
- ☐ Currency
- ☐ Date
- ☐ Date/Time
- ☐ Email
- ☐ Geolocation
- ☐ Number

Each option has a brief description of its functionality. For example, 'Master-Detail Relationship' is described as creating a special type of parent-child relationship between two objects.

Select the data type has master detail relation and click next.



The screenshot shows the Salesforce Setup interface for creating a new relationship. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'New Relationship' and shows 'Step 3 of 6: Enter the label and name for the lookup field'. The form includes fields for Field Label (Account), Field Name (Account), Description, Help Text, and Child Relationship Name (Accounts). Navigation buttons (Previous, Next, Cancel) are at the top right.

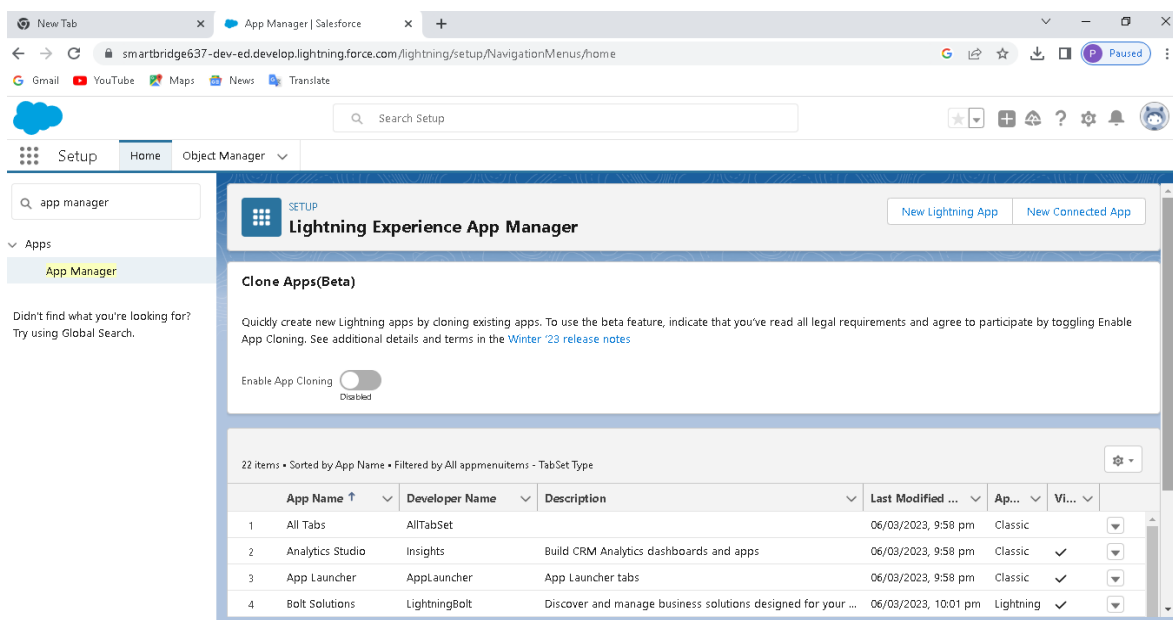
you give the label name for the field, give it has sales order and click next.

Select visible for all profiles in field level security and select page layout in next page and save it.

MILESTONE-4 Application

ACTIVITY-1 Creation of Application

Search for app manager



The screenshot shows the Salesforce Lightning Experience App Manager interface. The left sidebar has a search bar with 'app manager' and a list of apps including 'App Manager'. The main content area is titled 'Lightning Experience App Manager' and features a 'Clone Apps(Beta)' section with a toggle for 'Enable App Cloning' (currently Disabled). Below this is a table listing 22 items, sorted by App Name, filtered by All appmenuitems - TabSet Type. The table has columns for App Name, Developer Name, Description, Last Modified, App Type, and Visibility.

App Name	Developer Name	Description	Last Modified	App Type	Visibility
1 All Tabs	AllTabSet		06/03/2023, 9:58 pm	Classic	
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	06/03/2023, 9:58 pm	Classic	✓
3 App Launcher	Applauncher	App Launcher tabs	06/03/2023, 9:58 pm	Classic	✓
4 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your ...	06/03/2023, 10:01 pm	Lightning	✓

Select new lightning app

New Lightning App

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

*App Name [?]
sales app

*Developer Name [?]
sales_app

Description [?]
Enter a description...

App Branding

Image [?]
[Upload](#)

Primary Color Hex Value [?]
#0070D2

Org Theme Options

[Next](#)

App	App Launcher	App Launcher tabs	Created	Theme	Status
3	App Launcher	App Launcher tabs	06/03/2023, 9:58 pm	Classic	✓
4	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your ...	Lightning	✓

App name has sales app

New Lightning App

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items

[Create](#)

Type to filter list...

- Accounts
- Alert Settings
- All Sites
- Alternative Payment Methods

Selected Items

- Accounts
- App Launcher

[Back](#) [Next](#)

App	App Launcher	App Launcher tabs	Created	Theme	Status
3	App Launcher	App Launcher tabs	06/03/2023, 9:58 pm	Classic	✓
4	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your ...	Lightning	✓

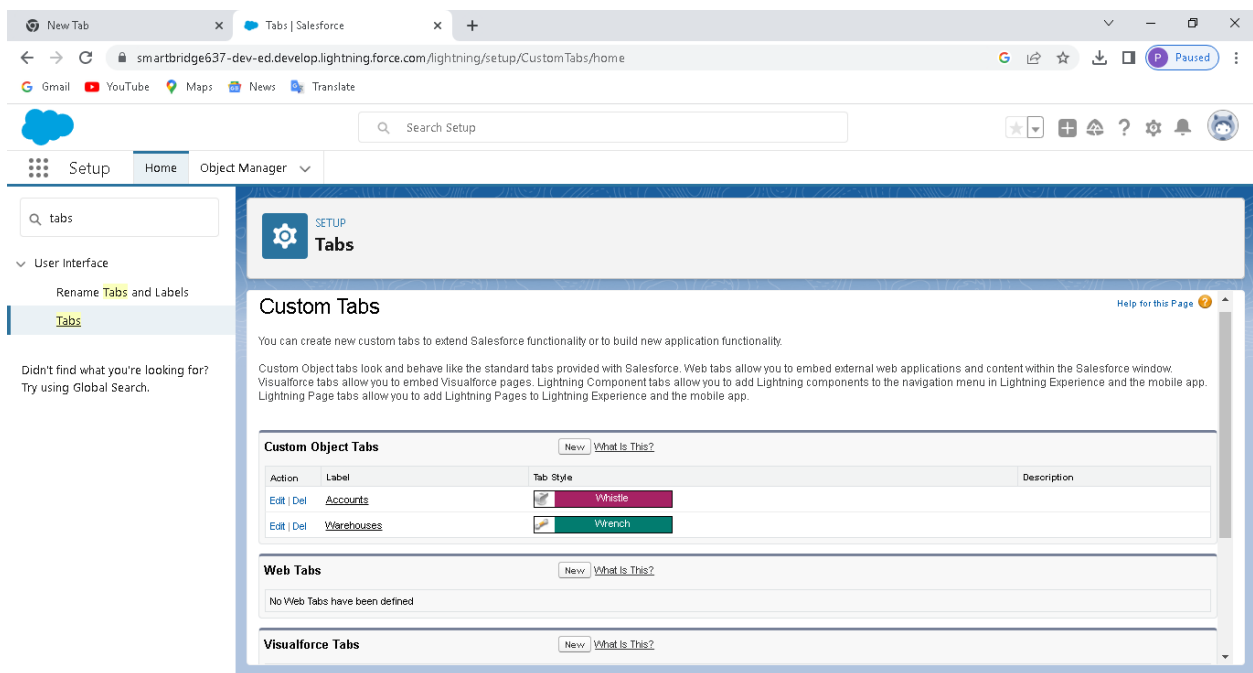
Accounts,contacts,opportunities,Leads,warehouse,dispatch/tracking,campaign to selected items

And system admin profile to available items to selected items.

MILESTONE-5 Layouts

ACTIVITY-1

- 1) Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs.
- 2) Under Custom Object Tabs, click New.
- 3) For Object, select Warehouse.
- 4) For Tab Style, select any icon



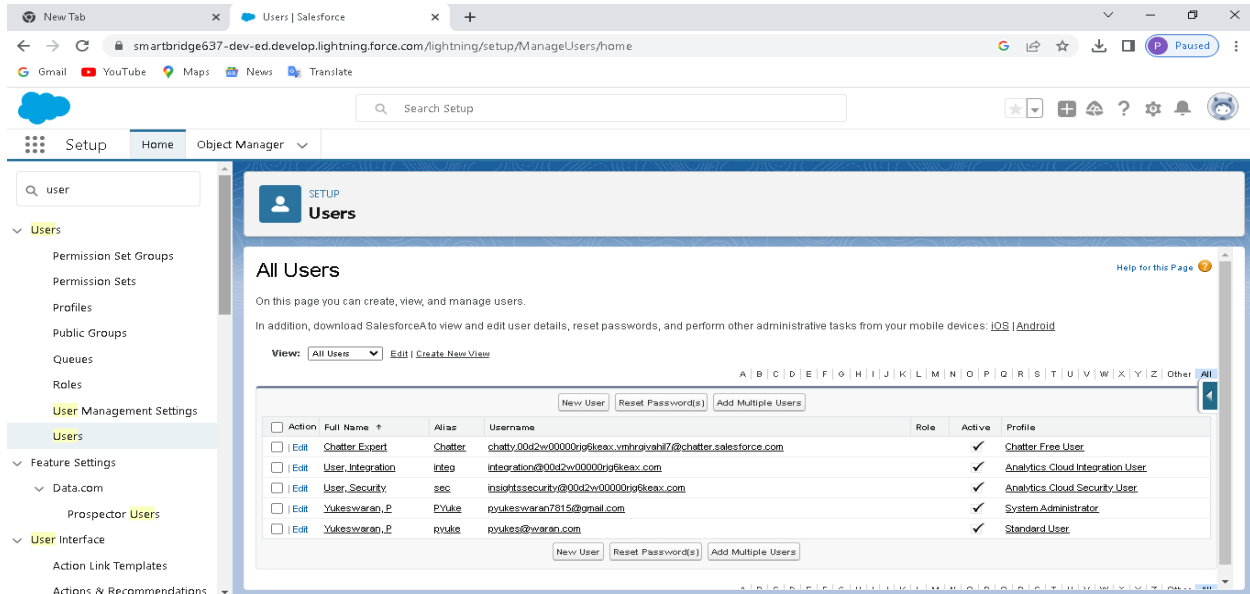
- 5) Leave all defaults as is. Click Next, Next, and Save.
- 6) In the same way create other objects such as students and parents.

MIESTONE-6 USER

ACTIVITY-1

Creation of user

1.Type user in and select it and click on new user



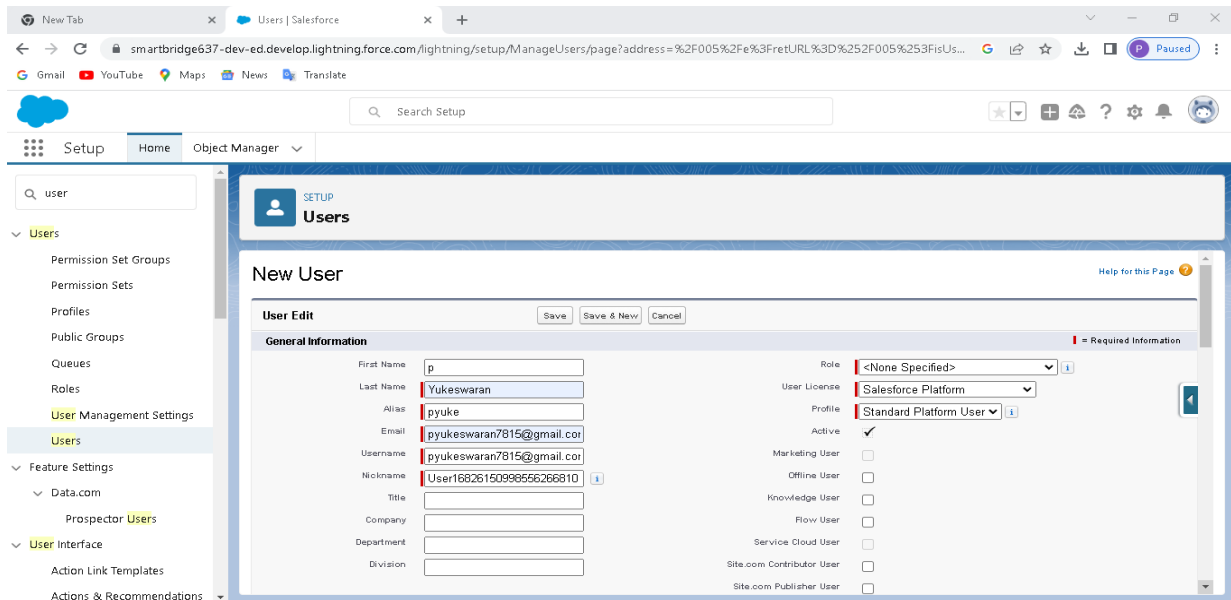
3) Give the first name and last name.

4) Enter your email in the email field.

5) Enter username; it must be unique

6) Select the user license of salesforce.

7) In the profile field select standard platform profile.



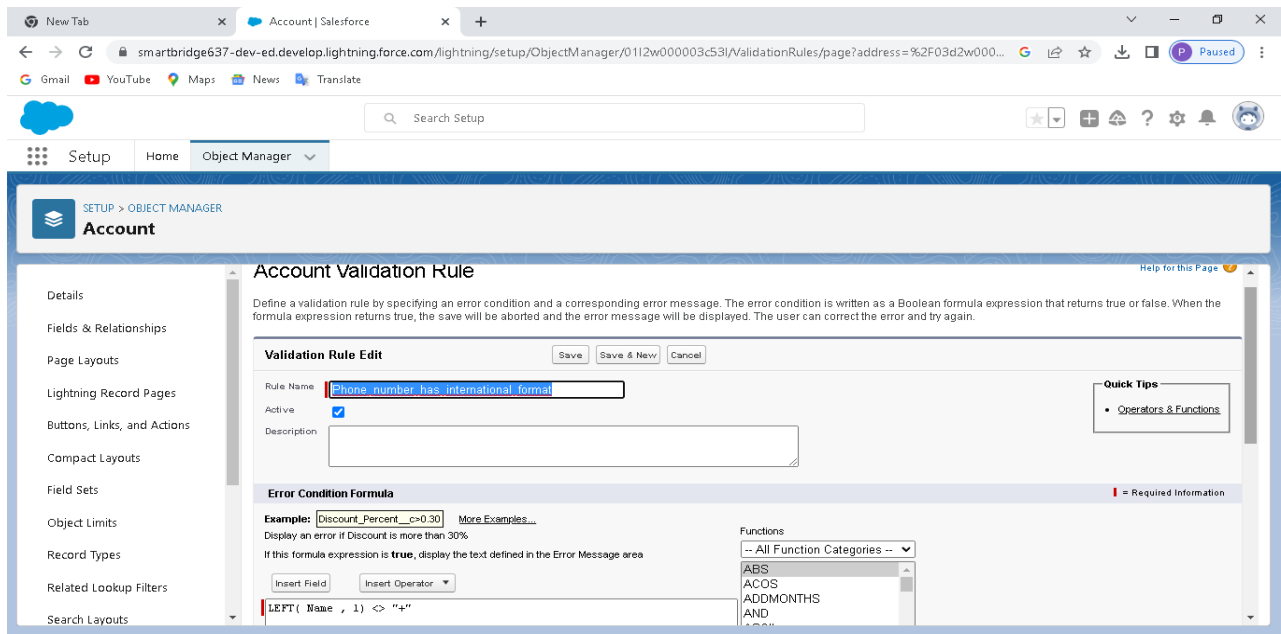
MILESTONE-7 Validation rules

ACTIVITY-1

Creation of validation rule

Select the Account object

Find validation rule



Click new, give the label name and in edit error conditional formula give the formula hasLEFT(Phone, 1)

<> "+"

The screenshot shows the Salesforce Setup page, specifically the Object Manager section for the 'Account' object. The 'Validation Rules' tab is selected. The 'Error Message' field is highlighted with a red border. The 'Error Location' is set to 'Field' and 'Account'. The 'Error Message' field contains the text 'Phone number must begin with + (country code)'. The 'Error Location' is set to 'Field' and 'Account'. The 'Error Message' field is highlighted with a red border.

And in error message give the description has Phone number must begin with + (country code).

In error location select top of the field.

REPORTS :

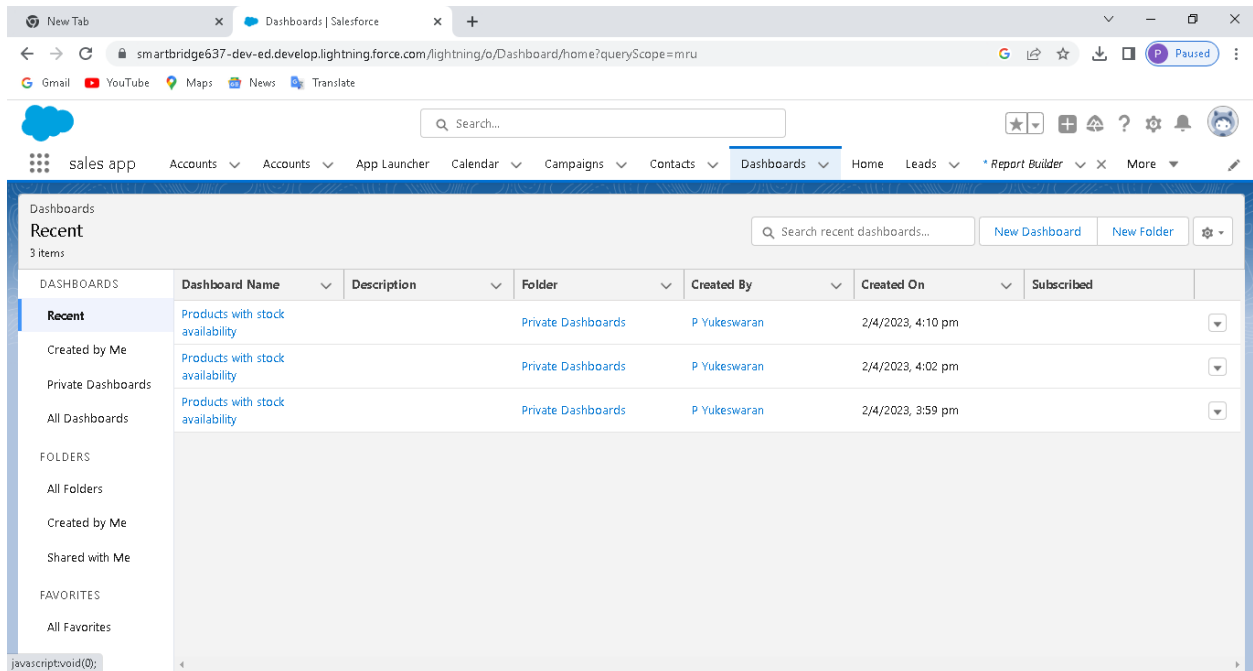
The screenshot shows the Salesforce Report Builder page. The report is titled 'Products with stock availability' and is in the 'Warehouses' group. The report shows a table with columns 'Warehouse: ID', 'Warehouse: warehouse Name', and 'Total'. The report is currently empty, showing 'No records returned. Try editing report filters.' The 'Outline' section on the left shows the report structure with 'GROUP ROWS' and 'GROUP COLUMNS' sections. The 'Columns' section shows the report columns: 'Warehouse: Created By', 'Warehouse: Last Modified By', and 'Warehouse: warehouse Name'. The 'Details' section shows the report details: 'Warehouse: Created By', 'Warehouse: Last Modified By', and 'Warehouse: warehouse Name'. The 'Row Counts' section shows the report row counts: 'Row Counts', 'Detail Rows', 'Grand Total', and 'Stacked Summaries'. The 'Conditional Formatting' section shows the report conditional formatting options.

MILESTONE-8 Dashboard

Creation of Dashboards

Click on the app launcher and search for dashboards.

Select the new dashboard option.

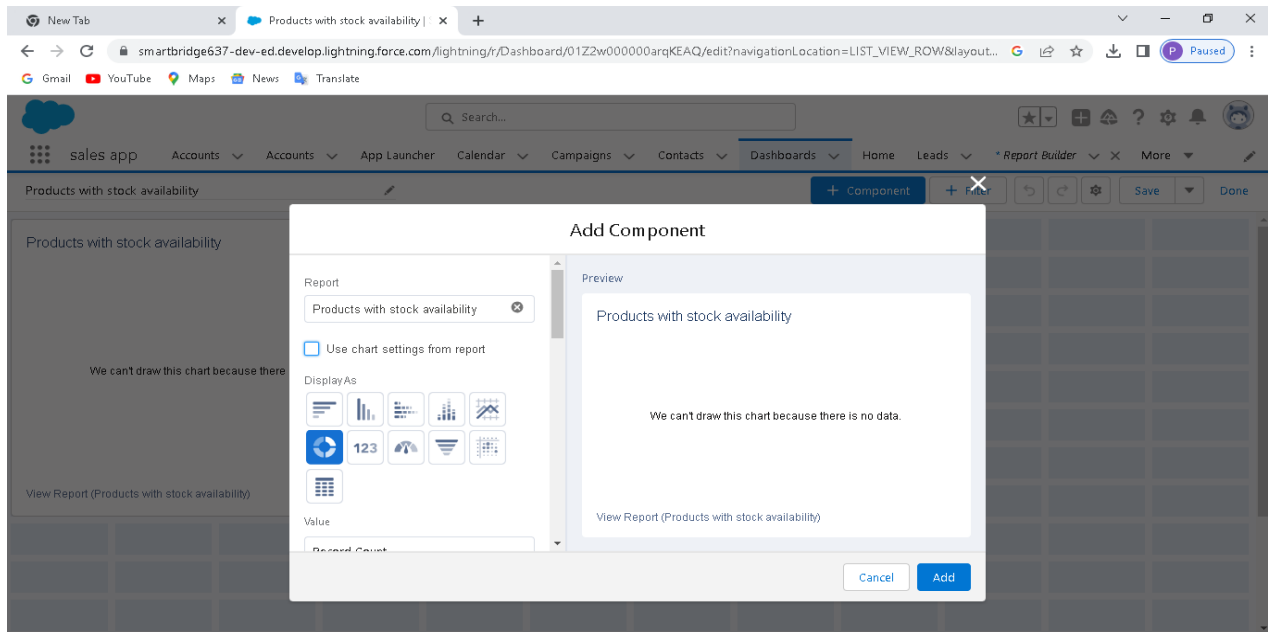


3) Name the dashboard has a products with stock availability.

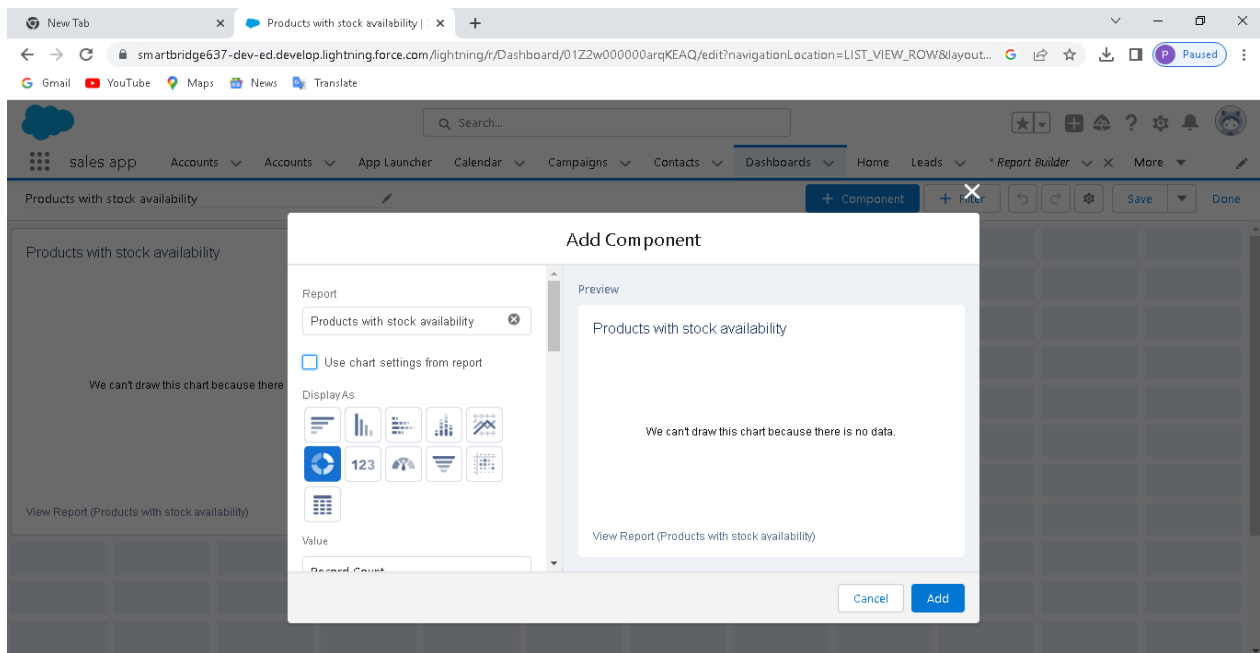
4) And select create option.

5) Now click on Add component and for report select passport with locations.

6) Select the donut chart in display as section.



Ensure that value is record count and sliced by product name



Leave the default values.

Click on add.

And save the dashboard.

4. Trailhead Profile Public URL

Team Lead : <https://trailblazer.me/id/bdharaneeswaran>

Member 1 : <https://trailblazer.me/id/kdurairaj9>

Member 2 : <https://trailblazer.me/id/dineshnandhan>

Member3 : <https://trailblazer.me/id/pyukeswaran>

5. Advantages & Disadvantages

Advantages

Automated Sales Processes: With Salesforce, you can automate your sales processes and make them more efficient. ...

Improved Customer Relationships: With Salesforce, you can keep track of your customers' movements and interactions in a centralized location

Disadvantages

- Expensive.
- You have to pay for add-ons to get the most out of the software.
- Configuration and setup is complex and time-consuming.
- Cluttered interface makes navigation and simple tasks unnecessarily complex.
- The learning curve never seems to end.
- Customer support has a poor reputation.

6. Applications

Salesforce can be used to manage orders from retail stores and distributors, including tracking orders, processing payments, and managing inventory levels. This can help field sales teams ensure that orders are fulfilled quickly and accurately and that inventory levels are maintained at optimal levels.

7. Conclusion

Hence, Sales force management is necessary for building and maintaining efficient sales processes, from order fulfillment to customer service. It is also important in bridging the gap between customers, the company, brand and product or service. .

8. Future Scope

In the longer term, we expect Salesforce to integrate data science and big data capabilities to its Service Cloud and Marketing Cloud. This would result in automated customer service tasks (via Service Cloud) and would let marketers leverage data for predictive and targeted marketing