Retail Management application using Salesforce

1 INTRODUCTION

1.1 Overview

Sales Force:

Salesforce Platform is a cloud-based technology platform that enables businesses to build, integrate, and deploy custom applications and solutions that meet their specific needs. It is a comprehensive platform that provides tools and services for application development, data integration, mobile app development, and more. At its core, Salesforce Platform is built on a multi-tenant architecture that allows multiple customers to share the same infrastructure and resources. This means that customers can benefit from economies of scale, as well as automatic updates and maintenance, without having to worry about hardware or software.

Salesforce is our customer success platform, designed to help us sell, service, market, analyze, and connect with our customers.

Salesforce has everything we need to run our business from anywhere. Using standard products and features, we can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store our data securely in the clouds.

In this project, Retail Management Application Using Salesforce. We had created an application called a Sales Application (Sales App).

1.2 Purpose

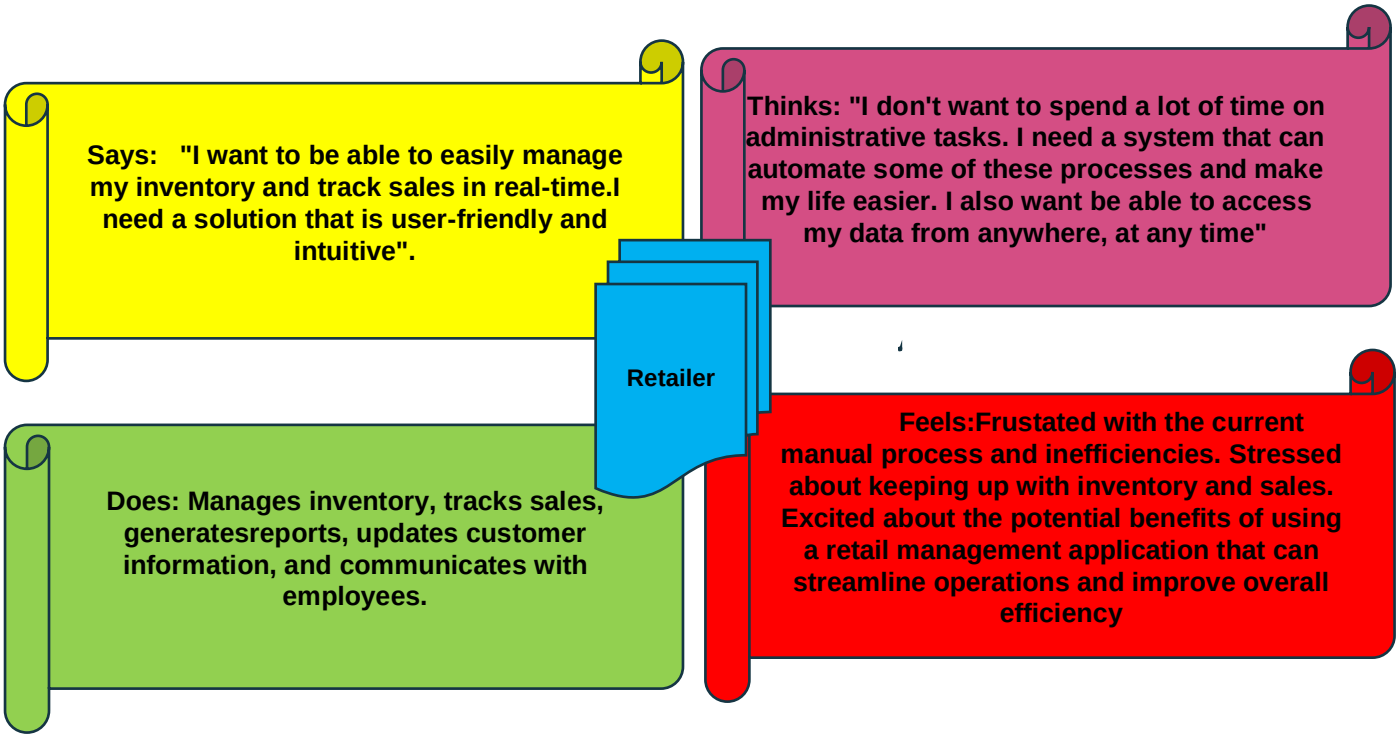
The purpose of this sales application (sales app) is for the sales reps to use this Application and store customers data's.

Retailing encompasses the business activities involved in selling goods and services to consumers for their personal, family, or household etc. 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.

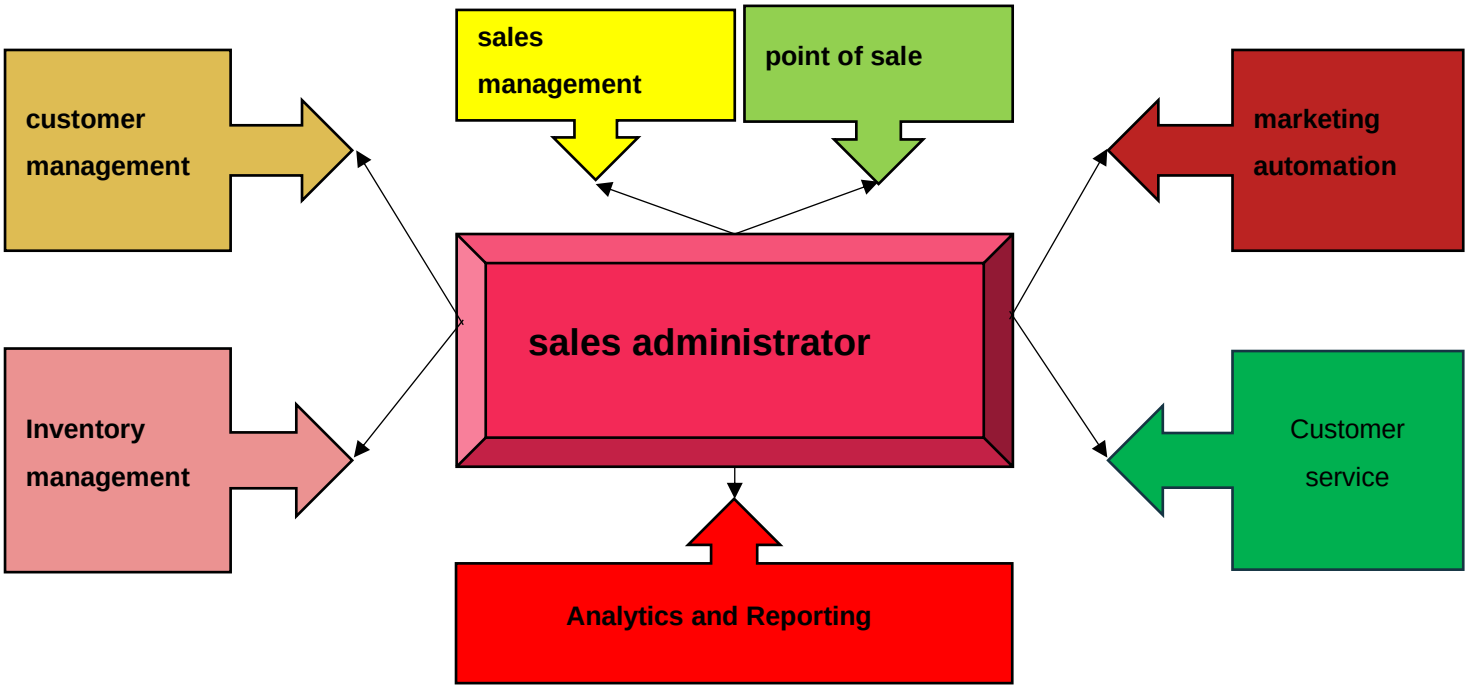
Salesforce is game-changing technology, with a host of productivity-boosting features that will help you sell smarter and faster.

2 PROPLEM DEFINTION & DESIGN THINKING

2.1 Empathy map



2.2 Ideation & Brainstorming map screenshot



1.Customer Management.

1)Capture and manage customer data, including personal information, purchase history, and preferences.

2) Create customer profiles to track their interaction with the business.

3) Use customer data to create personalized marketing campaigns and offers.

2.Sales Management:

1)Manage sales data, including sales orders, invoices, and receipts.

2)Tracks sales performance by product, location, and salesperson.

3)Use data analytics to identify trends and optimize sales strategies.

4)Generate reports to evaluate sales performance and profitability.

3.Inventory Management

1)Track inventory levels and movements across multiple locations.

2)Monitor product availability and create purchase orders as needed.

3)Manage product pricing and promotions.

4.Point of Sales (POS)

1)Use Salesforce’s POS system to process sales transactions.

2)Accept payments through various channels, including credit cards, mobile payments, and gift cards.

3)Manage returns, refunds, and exchanges.

5.Marketing Automation

1)Automate marketing campaigns based on customer behavior and preferences.

2)Use Salesforce’s marketing automation tools to create targeted email campaigns, social media ads, and other marketing.

3)Analyze campaign performance and adjust marketing strategies as needed.

6.Customer Service

1)Use Salesforce’s customer service tools to provide support to customers.

2)Create support tickets to track customer issues and resolutions.

3)Manage customer feedback and reviews.

7) Analytics and Reporting

1)Use Seles force's reporting and analytics tools to generate insights into sales, marketing, and customer data.

2)Customize dashboards and reports to track key performance indicators (KPIs) and monitor business performance.

3)Analyze data to identify trends.

3. RESULT

3.1 Data model:

<table>
<tr><td>Object name</td><td>Fields in the object</td></tr>
<tr><td>Object 1
Dispatch/tracking</td><td><table>
<tr><td>Field label</td><td>Data type</td></tr>
<tr><td>Dispatched</td><td>Check box</td></tr>
<tr><td>Sales order</td><td>Master-detail(payment)</td></tr>
</table></td></tr>
<tr><td>Object 2
Warehouset</td><td><table>
<tr><td>Field label</td><td>Data type</td></tr>
<tr><td>Warehouset name</td><td>Text (80)</td></tr>
<tr><td>Owner</td><td>Lookup (user, lookup)</td></tr>
</table></td></tr>
<tr><td>Object 3
Parent</td><td><table>
<tr><td>Field label</td><td>Data type</td></tr>
<tr><td>Parent name</td><td>Text (80)</td></tr>
<tr><td>Owner</td><td>Lookup (user, group)</td></tr>
</table></td></tr>
<tr><td>Object 4
Student</td><td><table>
<tr><td>Field label</td><td>Data type</td></tr>
<tr><td>Student name</td><td>Text (80)</td></tr>
<tr><td>Owner</td><td>Lookup (user, Group)</td></tr>
</table></td></tr>
<tr><td>Object 5
Display/tracking</td><td><table>
<tr><td>Field Label</td><td>Data type</td></tr>
<tr><td>Dispatched</td><td>Check box</td></tr>
<tr><td>Seller</td><td>Master-Detail (seller)</td></tr>
</table></td></tr>
</table>

3.2 Activity & Screenshot

Creating Developer Account

Creating a developer org in salesforce.
1. Go to https://developer.salesforce.com/
2. Click on sign up.

3. On the sign-up form, enter the following details :

1. First name & Last name
2. Email
3. Role : Developer
4. Company : College Name
5. County : India
6. Postal Code : pin code
7. Username : should be a combination of your name and company

This need not be an actual email id, you can give anything in the format : **username@organization.com**

Click on sign up after filling these.

Activity-2

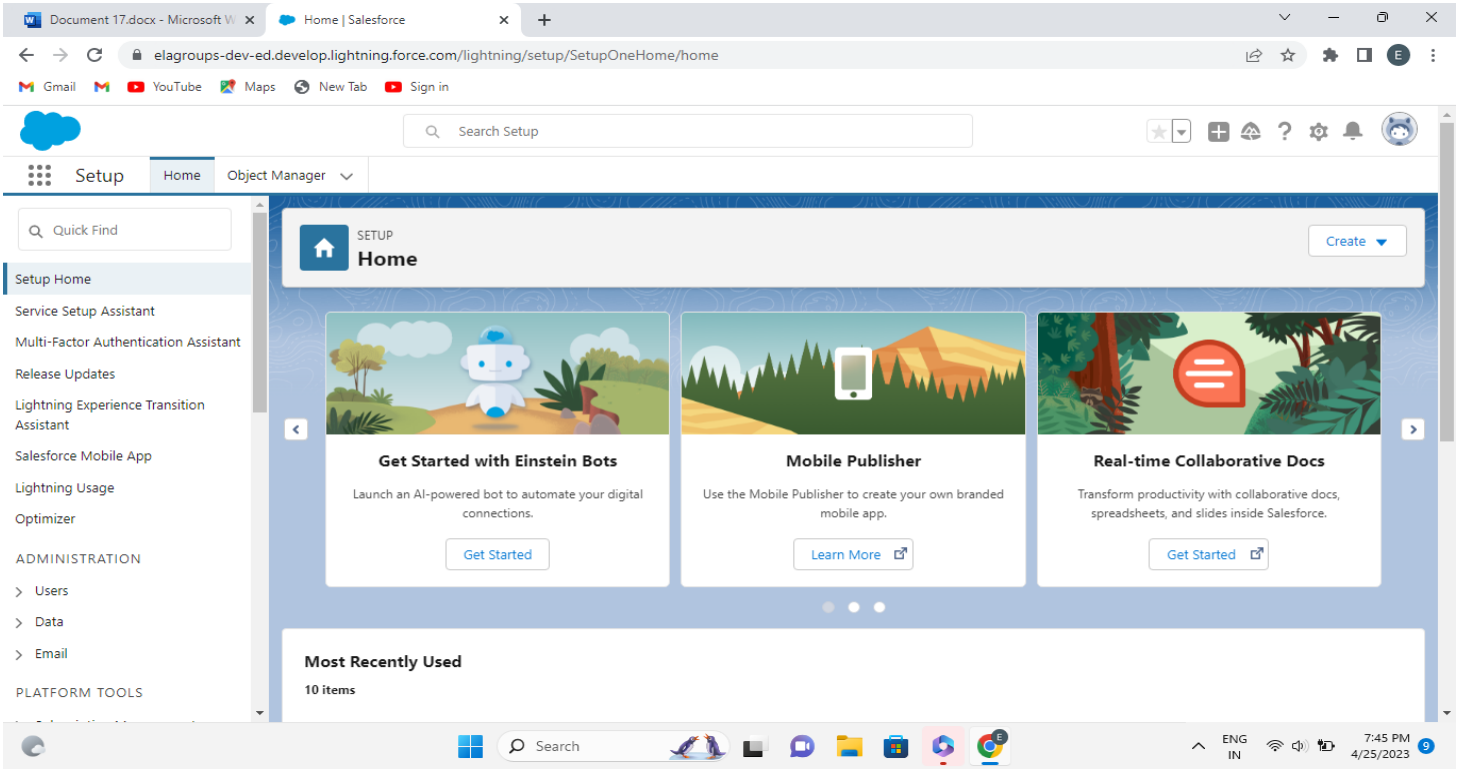
Login To Your Salesforce Account

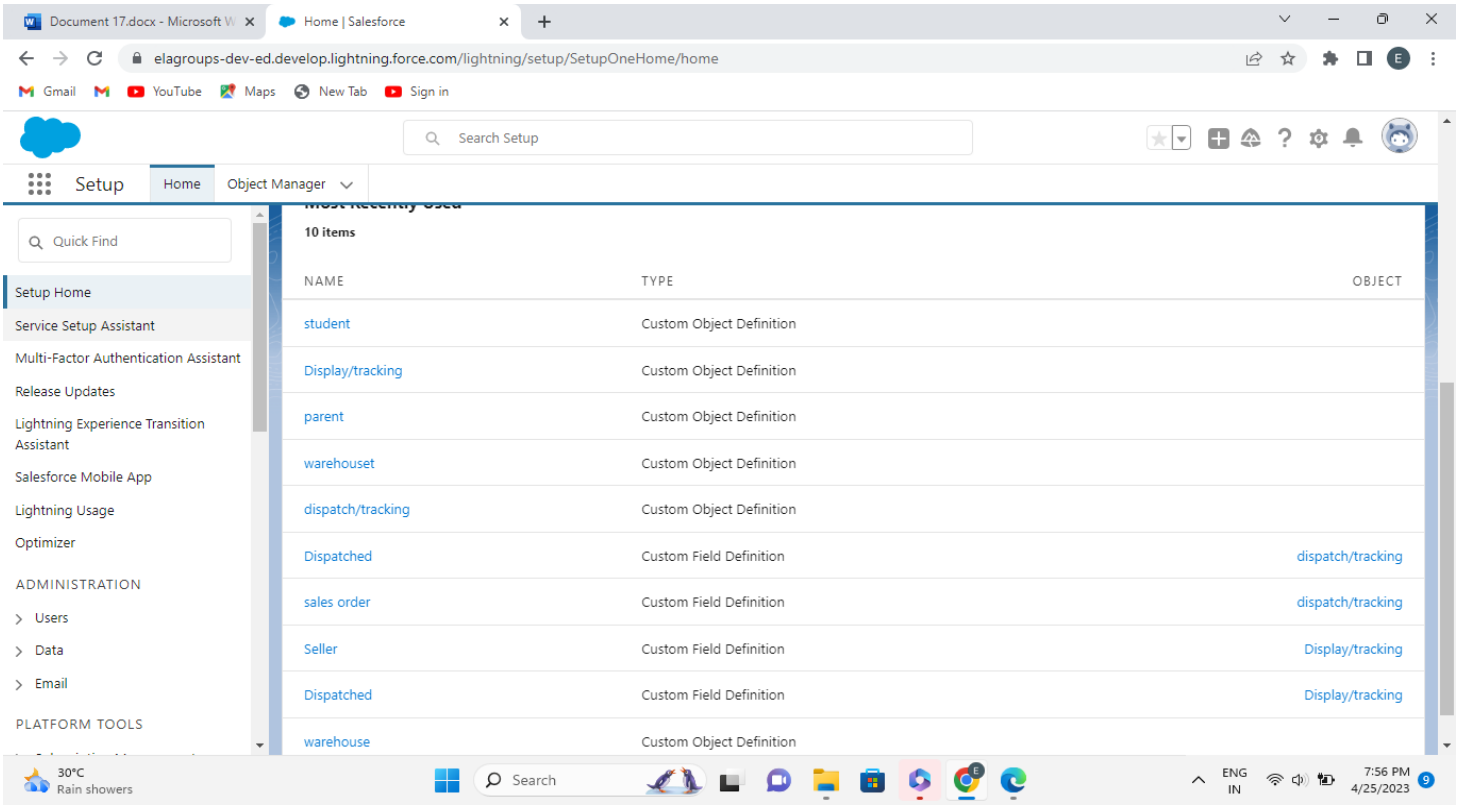
1.Go to salesforce.com and click on login.

2.Enter the username and password that you just created.

3.After logging on to the home page which you will see.

Salesforce Login: https://login.salesforce.com/





Activity-3

Creation Of Object Dispatch/Tracking

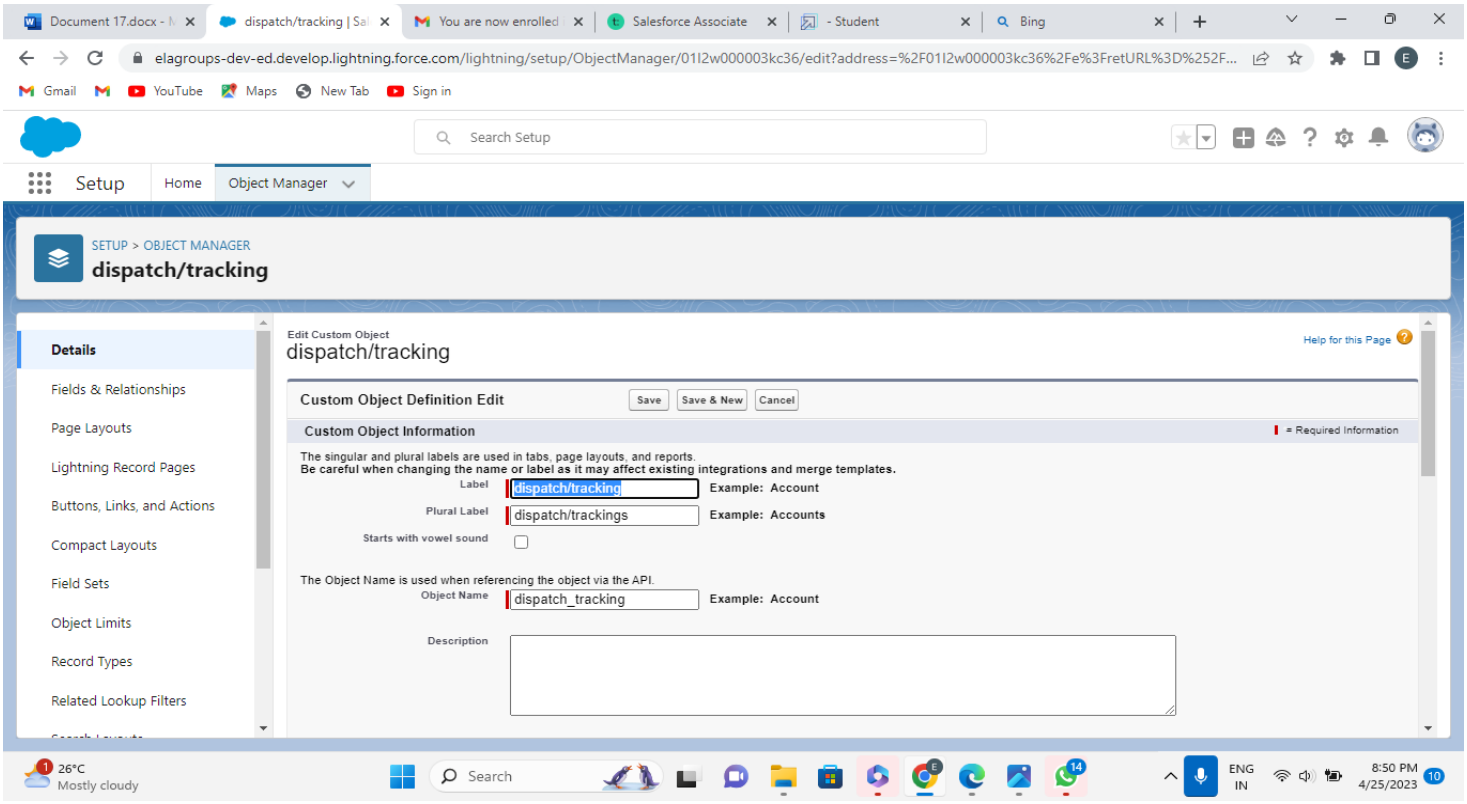
1) Navigate to setup and select object manager.

2) At the top of the right side there we can find create custom object.

3) We will navigate to custom object definition edit where we must give the object name.

4) The label name has Display/tracking and Plural label has Display/tracking's.
5) In enter record name available only once a custom object is created.
9) Then click on next we will navigate to the new custom object tab where we must select tab style and click on next.

10) After tab selection you will be navigated to add to profiles select default on click on next.
11) Thereafter we must select a custom app select include tab so that object will be in all objects and select save object.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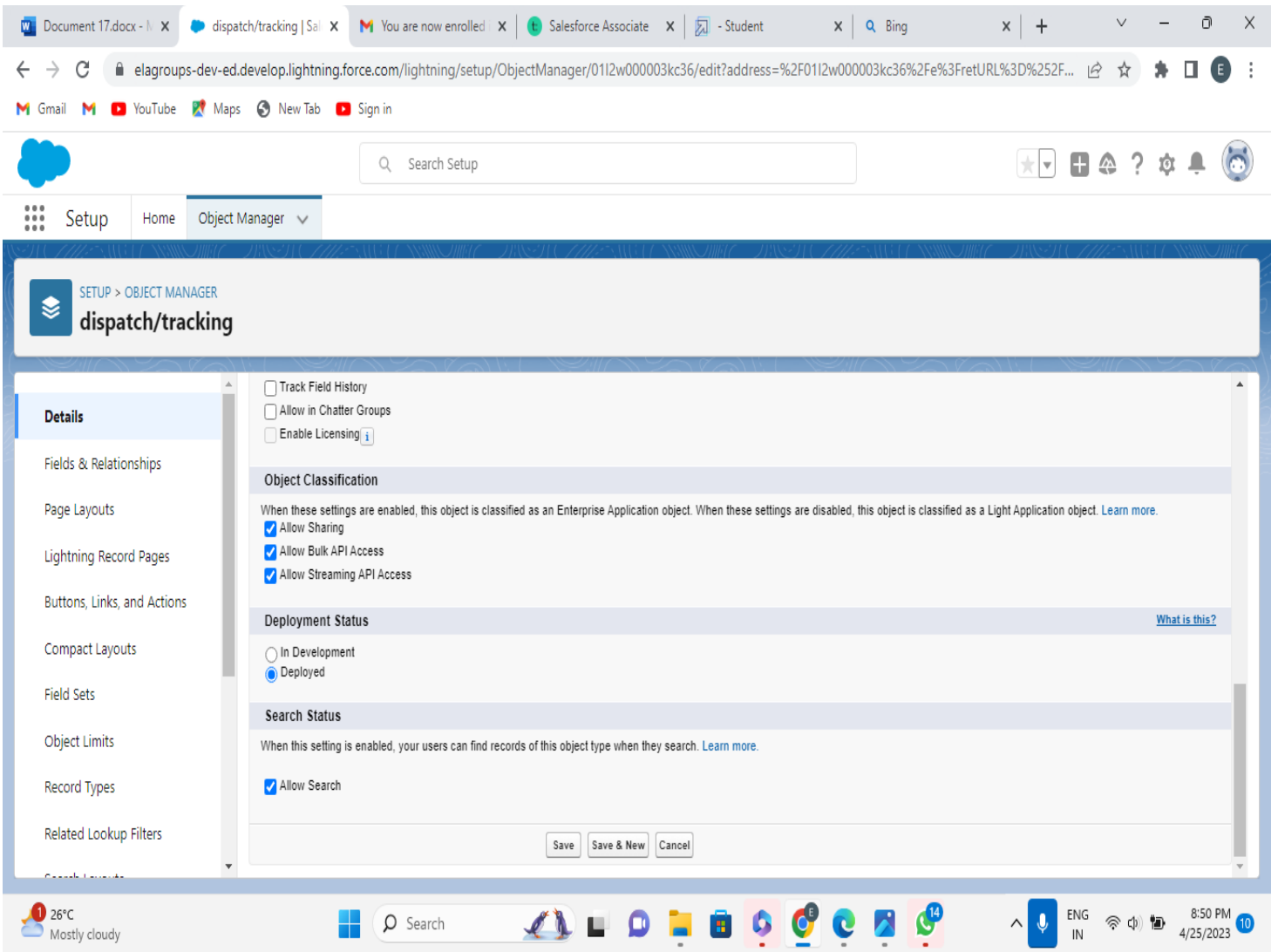
dispatch/tracking | Sal
You are now enrolled
Salesforce Associate
- Student
Bing
elagroups-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003kc36/edit?address=%2F01I2w000003kc36%2Fe%3FretURL%3D%252F...
Gmail
YouTube
Maps
New Tab
Sign in
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
dispatch/tracking
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Edit Custom Object
dispatch/tracking
Help for this Page
Custom Object Definition Edit
Save
Save & New
Cancel
Custom Object Information
= Required Information
The singular and plural labels are used in tabs, page layouts, and reports.
Be careful when changing the name or label as it may affect existing integrations and merge templates.
Label
dispatch/tracking
Example: Account
Plural Label
dispatch/trackings
Example: Accounts
Starts with vowel sound
The Object Name is used when referencing the object via the API.
Object Name
dispatch_tracking
Example: Account
Description
26°C
Mostly cloudy
Search
ENG
IN
8:50 PM
4/25/2023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dispatch/tracking | Sal
You are now enrolled
Salesforce Associate
- Student
Bing
elagroups-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003kc36/edit?address=%2F01I2w000003kc36%2Fe%3FretURL%3D%252F...
Gmail
YouTube
Maps
New Tab
Sign in
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
dispatch/tracking
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Track Field History
Allow in Chatter Groups
Enable Licensing
Object Classification
When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. Learn more.
Allow Sharing
Allow Bulk API Access
Allow Streaming API Access
Deployment Status
What is this?
In Development
Deployed
Search Status
When this setting is enabled, your users can find records of this object type when they search. Learn more.
Allow Search
Save
Save & New
Cancel
26°C
Mostly cloudy
Search
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IN
8:50 PM
4/25/2023

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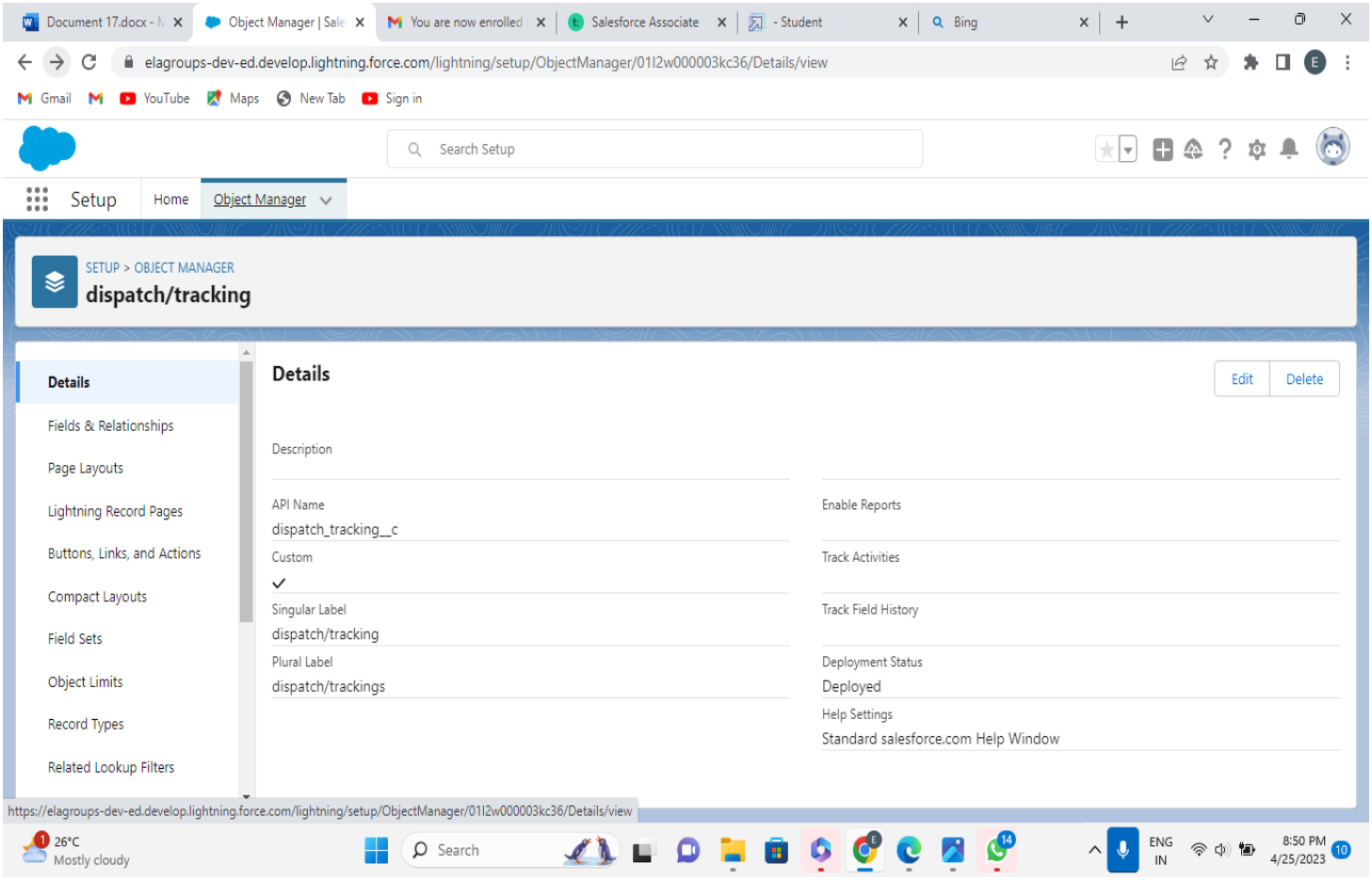
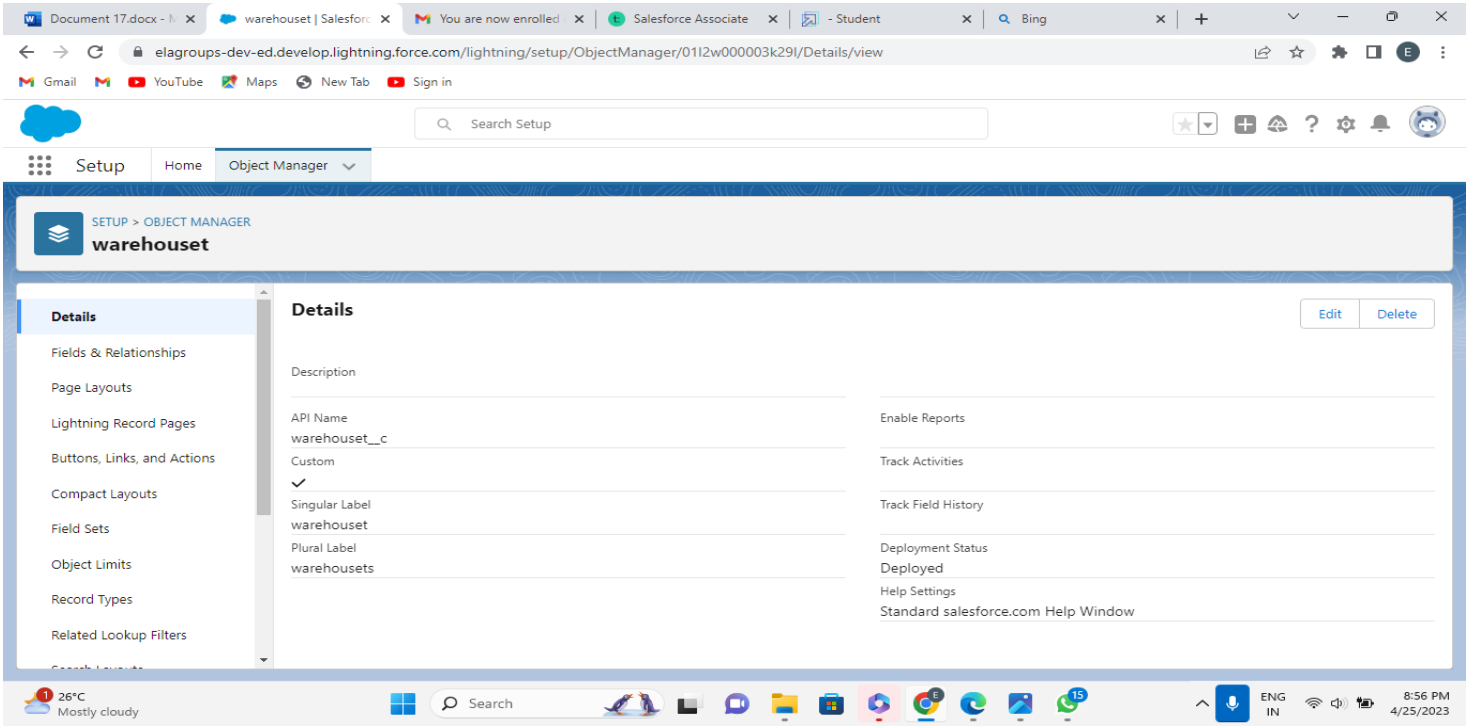
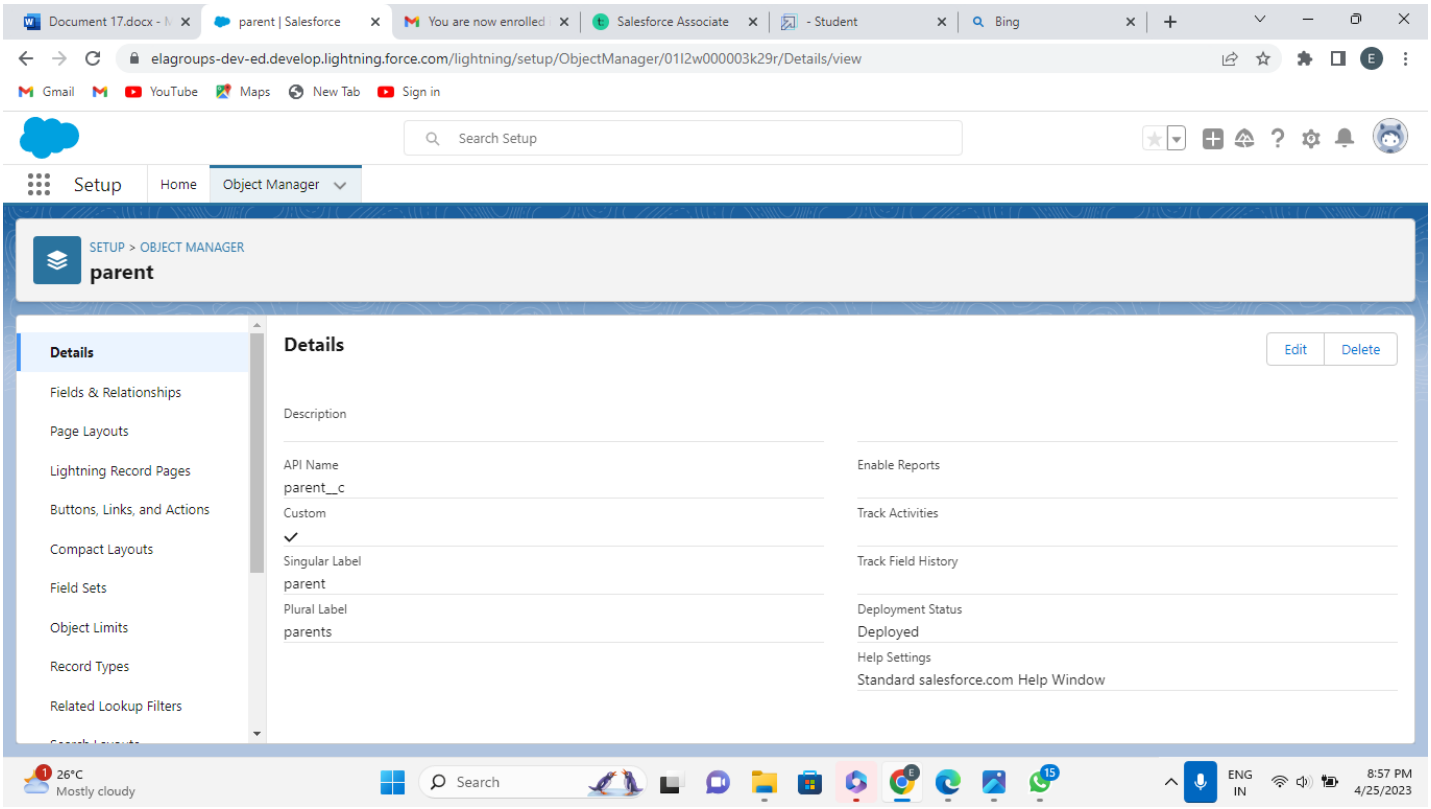


Similarly, we had created objects for display/tracking, warehouset, parent, student and warehouse




Document 17.docx
parent | Salesforce
You are now enrolled
Salesforce Associate
- Student
Bing
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Gmail
YouTube
Maps
New Tab
Sign in
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
parent
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Details
Edit
Delete
Description
API Name
parent__c
Custom
Singular Label
parent
Plural Label
parents
Enable Reports
Track Activities
Track Field History
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Standard salesforce.com Help Window
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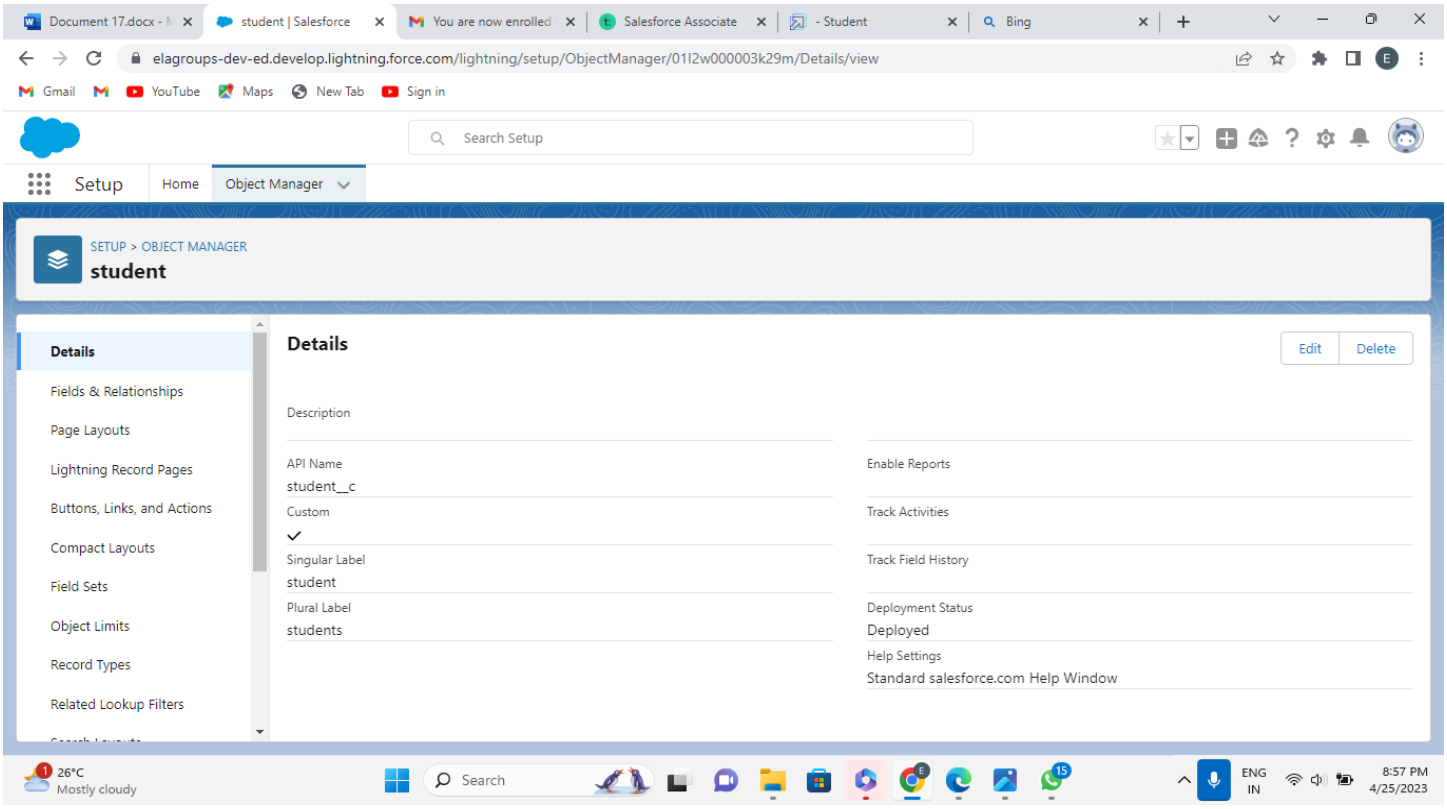
4/25/2023


Document 17.docx
student | Salesforce
You are now enrolled
Salesforce Associate
- Student
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Gmail
YouTube
Maps
New Tab
Sign in
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
student
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Details
Edit
Delete
Description
API Name
student__c
Custom
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student
Plural Label
students
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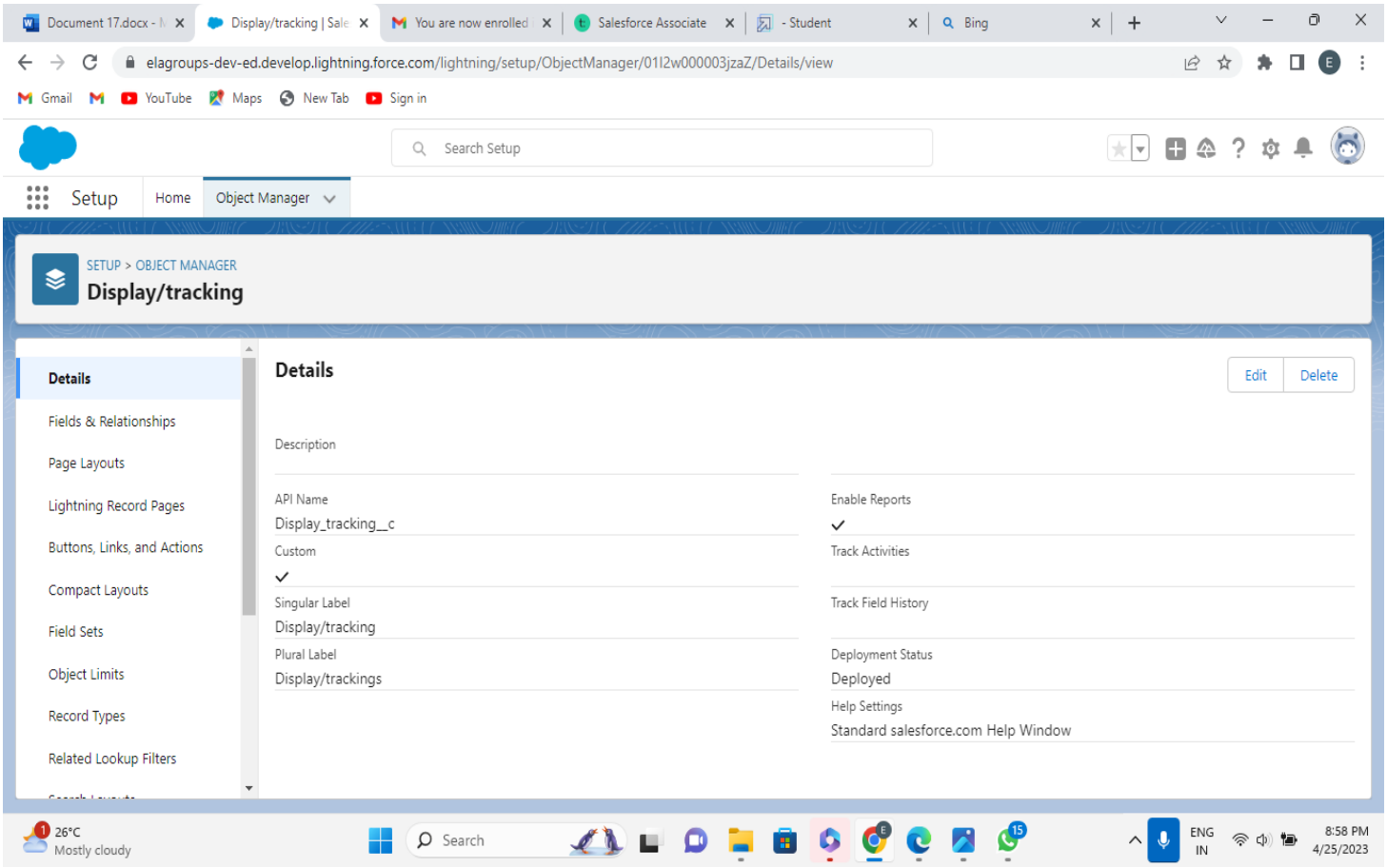
4/25/2023



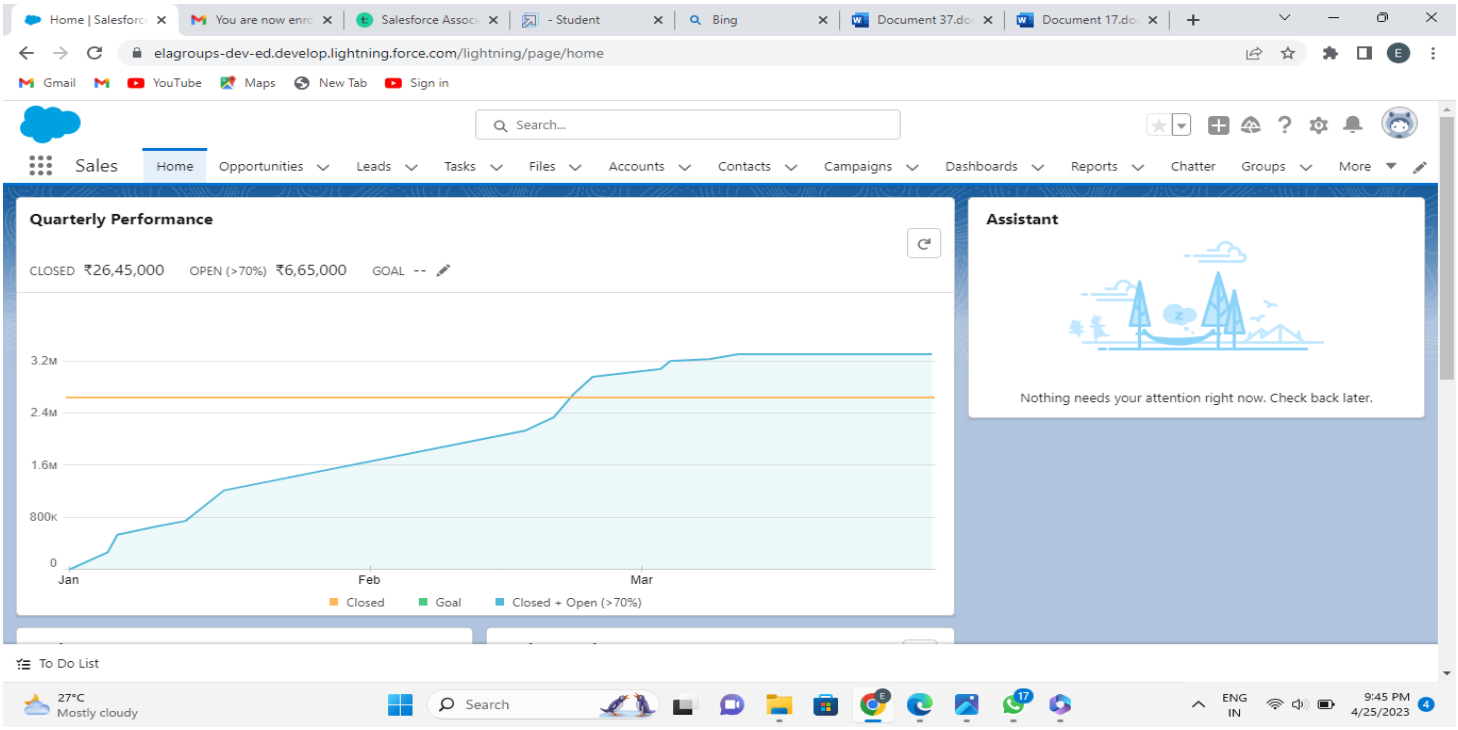
Activity-4

Creation Of Application

1) Navigate to setup and search for app manager
2) And select an option for a new lightning app.
3) Give the app name has sales apps.

4) Upload the picture and click next.
5) Choose the app option as navigation style- standard navigation, support from factors-desktop & mobile and select next.

6) And move the objects from available items to selected items.
7) Accounts, contacts, opportunities, Leads, warehouse, dispatch/tracking, campaign to selected items.
8) And system admin profile to available items to selected items.

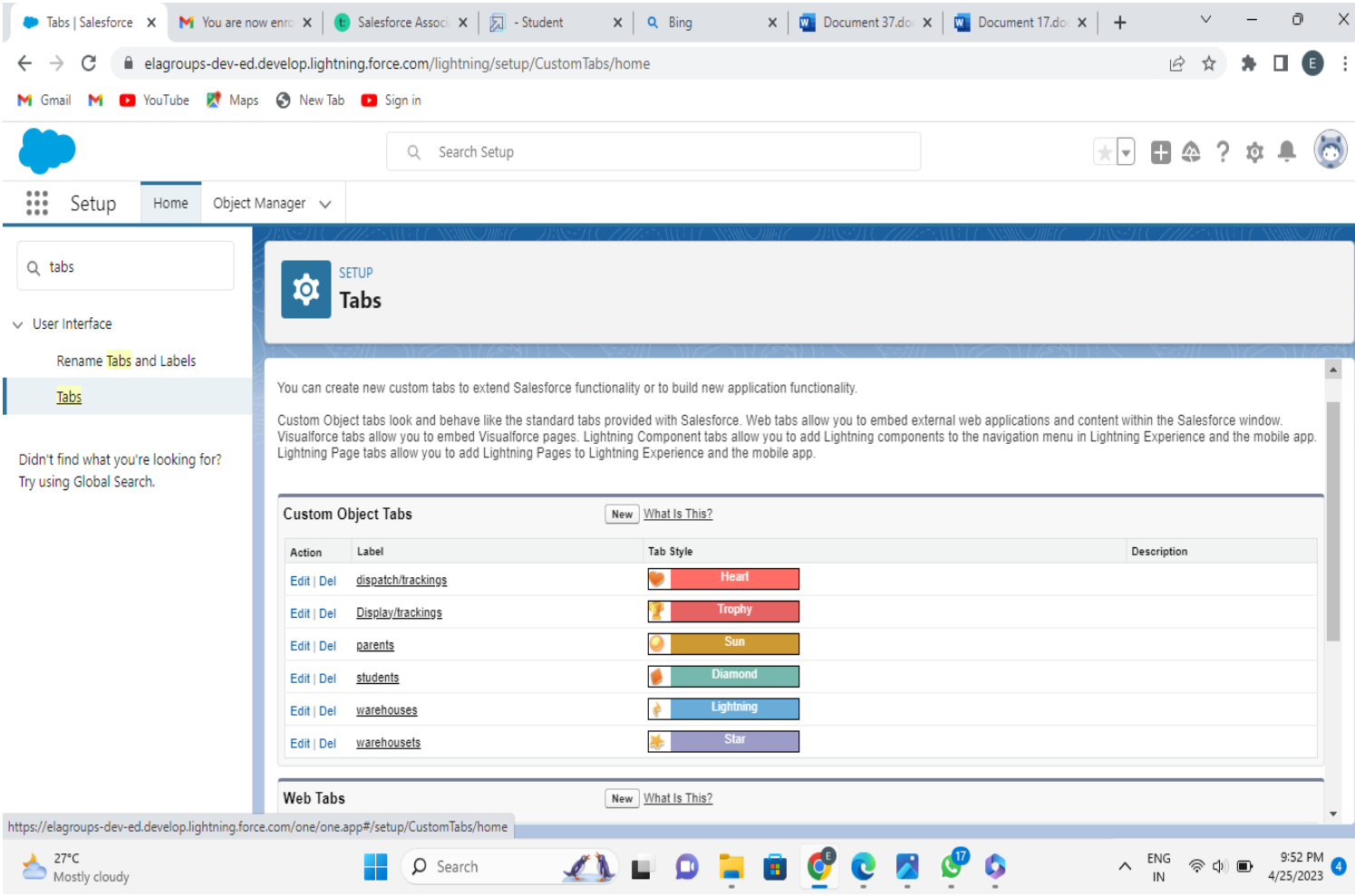


Activity-5

Creation Of Custom Tabs

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 Warehouset.
4) For Tab Style, select any icon.

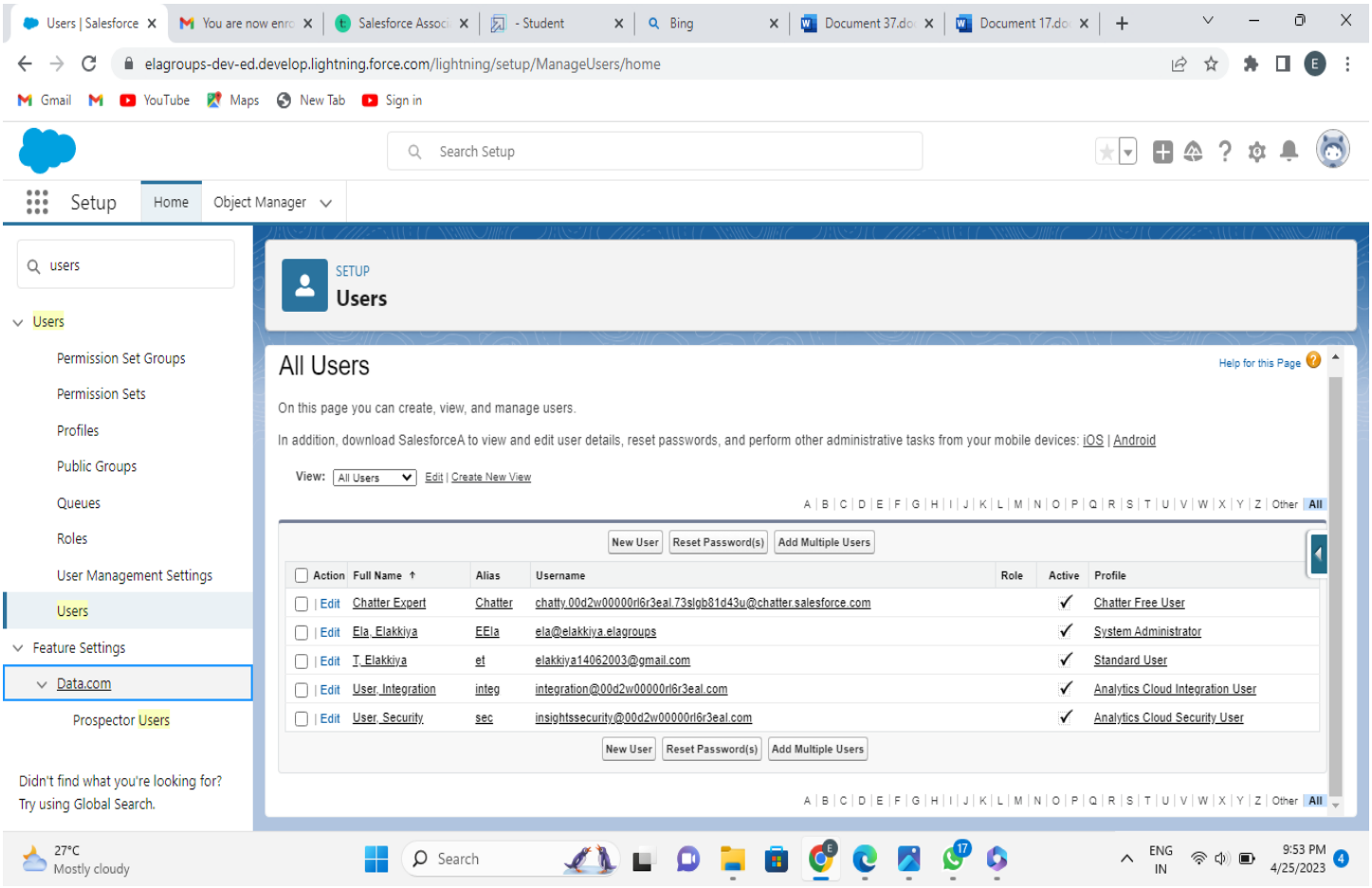
5) Leave all defaults as is. Click Next, Next, and Save.
6) In the same way create other objects such as students and parents.



Activity-6

Creation Of User

1) Navigate to setup in quick find search bar.
2) 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 the sales force.
7) In the profile field select standard platform profile.
8) At the bottom of the page check the box to generate a new password and notify the user immediately.

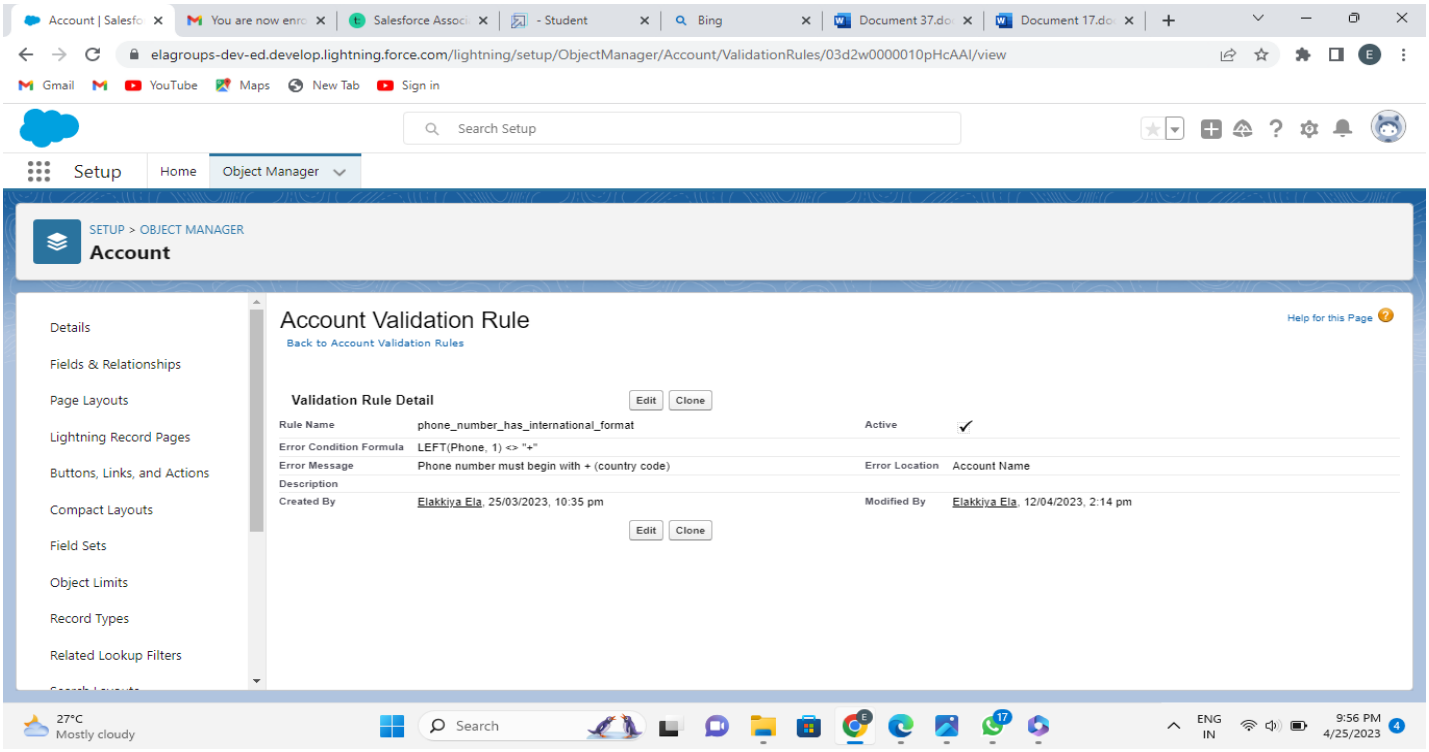


Activity-7

Creation Of Validation Rule

1) Navigate to object manager and select Account object.
2) In details section scroll down and find validation rule in it.
3) Click new, give the label name and in edit error conditional formula give the formula has LEFT(Phone, 1) <> "+".

4) And in error message give the description has Phone number must begin with + (countrycode).
5)In error location select top of the field.



Activity-7

Creation Of Report

1) Click on the app launcher and search for reports.
2) And select a new report, for the record type category select other reports.

3) Select Warehouses for the report type name.
4) Select the start button to create a new report.

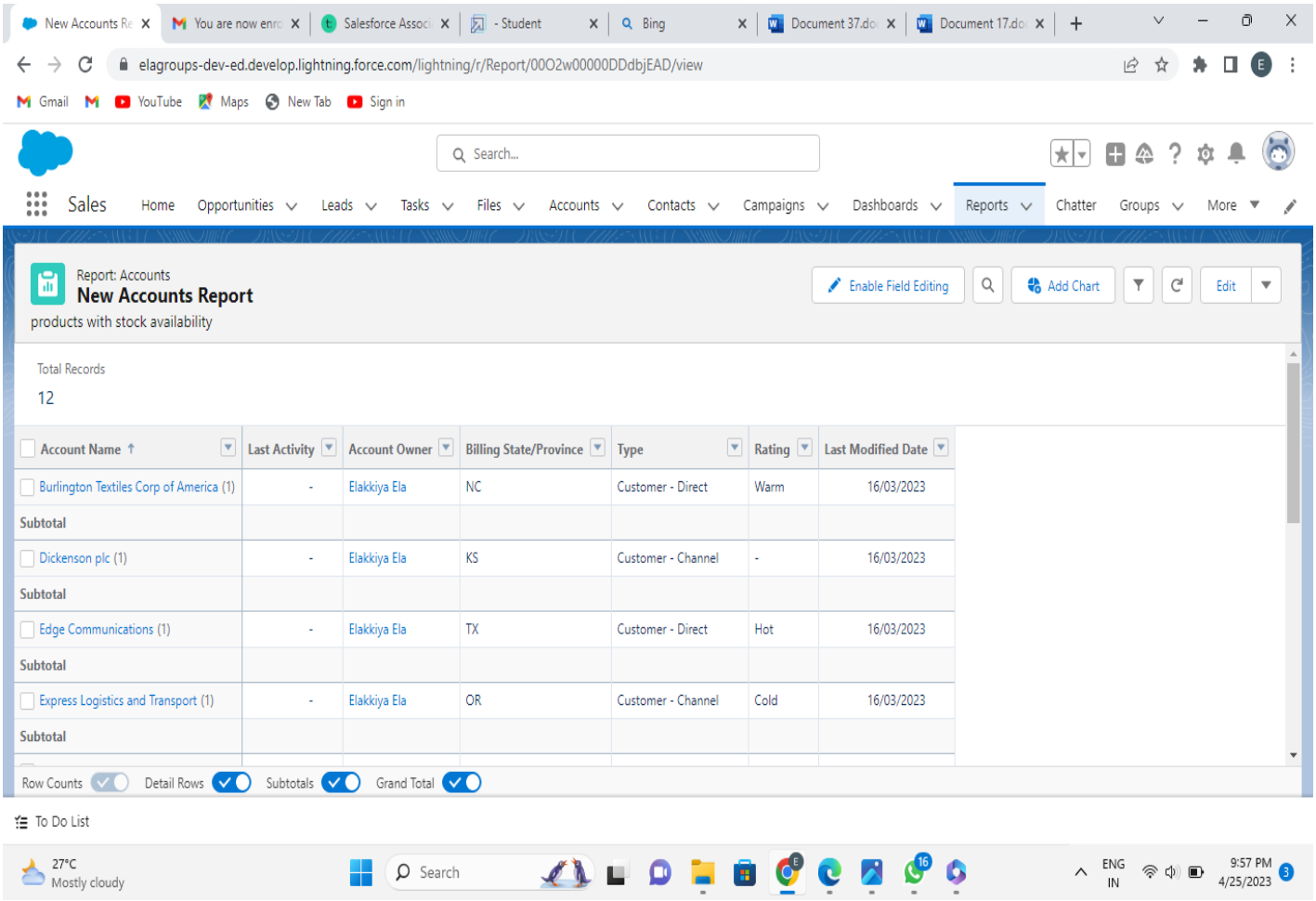
5) At the left side of the report you can find an outline pane.
6) In the group rows select Product name.

7) And in columns warehouse: name and stock available.

8) Now navigate to the filter pane available next to the outline pane and ensure in the show me section all my warehouses are selected.
9) And in the warehouse created date select all time.

10) And give the label name products with stock availability.

11) Click on save and run to save the report.



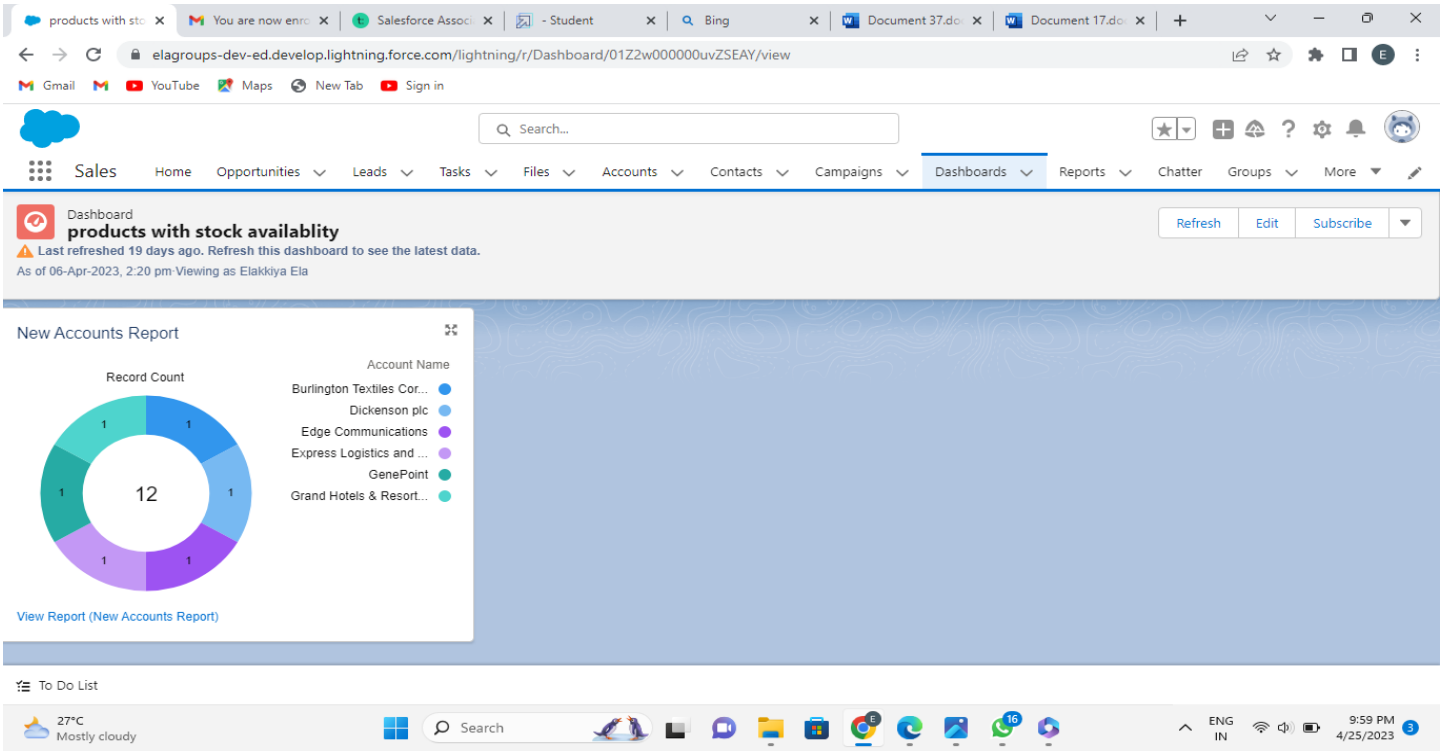
Activity-8

Creation Of Dashboard

1) Click on the app launcher and search for dashboards.
2) 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.
8) Leave the default values.

9) Click on add.

10) And save the dashboard.



4. Trailhead Profile public URL

Trail Lead - https://trailblazer.me/id/elela3

Trail member 1-https://trailblazer.me/id/bharv99

Trail member 2- https://trailblazer.me/id/mmeenatchi1

Trail member 3-https://trailblazer.me/id/kswetha24

5. ADVANTAGES & DISADVANTAGES

Advantages:

1) Understand customers better to personalize communication ...

2) Segment your customers better ...

3) Run more productive marketing campaigns, winning customer trust & loyalty ...

4) Enable outstanding customer support ...

5) Use AI predictions for smarter decisions ...

6)Salesforce has everything you need to run your business from anywhere.

7)Objects are database tables that permit you to store data that is specific to an organization

8)Apps in Salesforce are a group of tabs that help the application function by working together as a uniform.

9)Page layouts control the layout of an object, as a CRM product owner creates custom page layouts which define which fields the user can view and edit while entering data in objects.

10) Every user in Salesforce has a user account

11) Validation rules verify that the data a user enters in a record meets the standards we specify before the user can save the record

12)This source is highly secure.

Disadvantages:

1) It can be too expensive for small business to use

2) The competition from the sales force can make many of the sales claims.

3)The pricing structures are not streamlined.

4) The unlimited really is not unlimited

5)There are numerous limits in place for each information product.

6 This application works efficiently in Salesforce only.

7)This application did not work without the internet.

8)Make your passwords highly secure anyone can misuse by knowing your ID and passwords.

9)Did not work so fast. You need some patience.

6. APPLICATIONS

1) Apps in Salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo, and a particular. An app is a collection of items that work together to serve a function. Salesforce apps come in two flavors: Classic and Lightning.

2) This application is applied to sales companies by the sales force and used by the sales reps, managers and IT specialists who need

access to the company's records. Every user in the sales force has a Sales Account.

7. CONCLUSION

Our project, the Retail Management application using Salesforce, follows the following methods.

Customer 360 integrates with a wide range of data sources, such as marketing automation platforms, e-commerce systems, and customer service tools. This allows businesses to connect and correlate customer data across various channels and touchpoints, providing a more complete picture of customer behavior and preferences.

Businesses can segment their customers based on a variety of attributes, such as purchase history, demographics, and behavior. This segmentation enables targeted marketing and personalized engagement that can improve customer loyalty and retention.

Validation rules verify that the data a user enters in a record meets the standards you specify before the user can save the record.

A validation rule can contain a formula or expression that evaluates the data in one or more fields and returns a value of “True” or “False”. Validation rules also include an error message to display to the user when the rule returns a value of “True” due to an invalid value."

The dependent picklist, formula for picklist and creating the global value set. Then we create the reports with reference to the report builder.

Dashboards let you curate data from reports using charts, tables, and metrics. If your colleagues need more information, then they're able to view your dashboard's data-supplying reports. Filter a Dashboard. Dashboard filters make it easy for users to apply different data perspectives to a single dashboard.

Thus, we are concluding our project.

8. FUTURE SCOPE

1)Retailers spent heavily to attract new customers when empty shelves force shoppers to consider new brands; tightening margins mean they're facing pressure to get a return on that investment. Putting first-party data at the center our retention strategy ensures we can deliver personalized offers – to customers in both current and new industries – to increase customer engagement and lifetime value.

2)Give our associates on-the-sales-floor access to our customers' data and interactions across all touchpoints, such as ecommerce, marketing, and service. This helps them answer questions about product availability, locate merchandise, place orders, track deliveries, and efficiently manage returns.

3)Provide tools that let associates become service agents — from anywhere — so they can pick up microshifts to provide service via email, text, and chat. When you schedule employees for short or fragmented durations, you give them more flexibility and reduce business costs (thanks to the reduced risk of overstaffing).