

RETAIL MANAGEMENT APPLICATION USING SALESFORCE

INTRODUCTION

1.1 Overview

Retail management refers to the process of overseeing the day-to-day operations of a retail business to maximize profits and customer satisfaction. It involves various aspects such as merchandising, inventory management, marketing, customer service, and sales. Retail managers are responsible for creating and implementing strategies that drive sales, increase customer satisfaction, and manage the overall operations of a retail store or chain.

Some key responsibilities of retail management include:

Merchandising: The process of selecting, buying, displaying, and selling products in a retail store. This involves deciding which products to stock, how much inventory to keep on hand, and how to arrange products on the sales floor to attract customers.

Inventory management: The process of monitoring and controlling inventory levels to ensure that the right products are in stock at the right time. Retail managers need to analyze sales data and customer demand to determine the optimal inventory levels.

Marketing: Developing and implementing marketing strategies to promote products and services and drive sales. This includes advertising, promotions, and social media marketing.

Customer service: Ensuring that customers have a positive shopping experience and resolving any issues or complaints that arise. Retail managers need to train and manage their staff to provide excellent customer service.

Sales: Retail managers need to set sales goals, monitor sales performance, and motivate their staff to meet those goals. This involves analyzing sales data and making adjustments to sales strategies as needed.

1.2 Purpose

The purpose of retail management is to ensure the effective and efficient operation of a retail business to achieve its goals and objectives. This involves overseeing the day-to-day operations of the business, developing and implementing strategies that drive sales and increase customer satisfaction, managing inventory, merchandising products, providing excellent customer service, and optimizing the use of resources to maximize profitability.

The ultimate goal of retail management is to create a positive shopping experience for customers and build a loyal customer base. This is achieved by providing a wide selection of

products, offering competitive pricing, creating an attractive and welcoming shopping environment, and providing exceptional customer service.


Effective retail management is also critical for the financial success of a business. Retail managers must carefully manage inventory levels, analyze sales data to identify trends and opportunities, and make informed decisions about marketing, promotions, and pricing strategies. They must also manage staffing levels and control costs to ensure profitability

Overall, the purpose of retail management is to create a successful, profitable retail business that meets the needs of its customers, employees, and stakeholders.

PROBLEM DEFINITION & DESIGN THINKING

2.1 Empathy map

Template



Empathy map

Use this framework to develop a deep, shared understanding and empathy for other people. An empathy map helps describe the aspects of a user's experience, needs and pain points, to quickly understand your users' experience and mindset.

[Share template feedback](#)

Build empathy

The information you add here should be representative of the observations and research you've done about your users.

Says

What have we heard them say?
What can we imagine them saying?

Supervision

Merchandising

Inventory

Customer Service

Sales

Profitability

Thinks

What are their wants, needs, hopes, and dreams? What other thoughts might influence their behavior?

Profitability

Strategy

Omnichannel

Competition

dynamic

adaptable

Does

What behavior have we observed?
What can we imagine them doing?

customer-centric


challenging

rewarding

Feels

What are their fears, frustrations, and anxieties? What other feelings might influence their behavior?





Give them a name and a portrait to empathize with your persona.



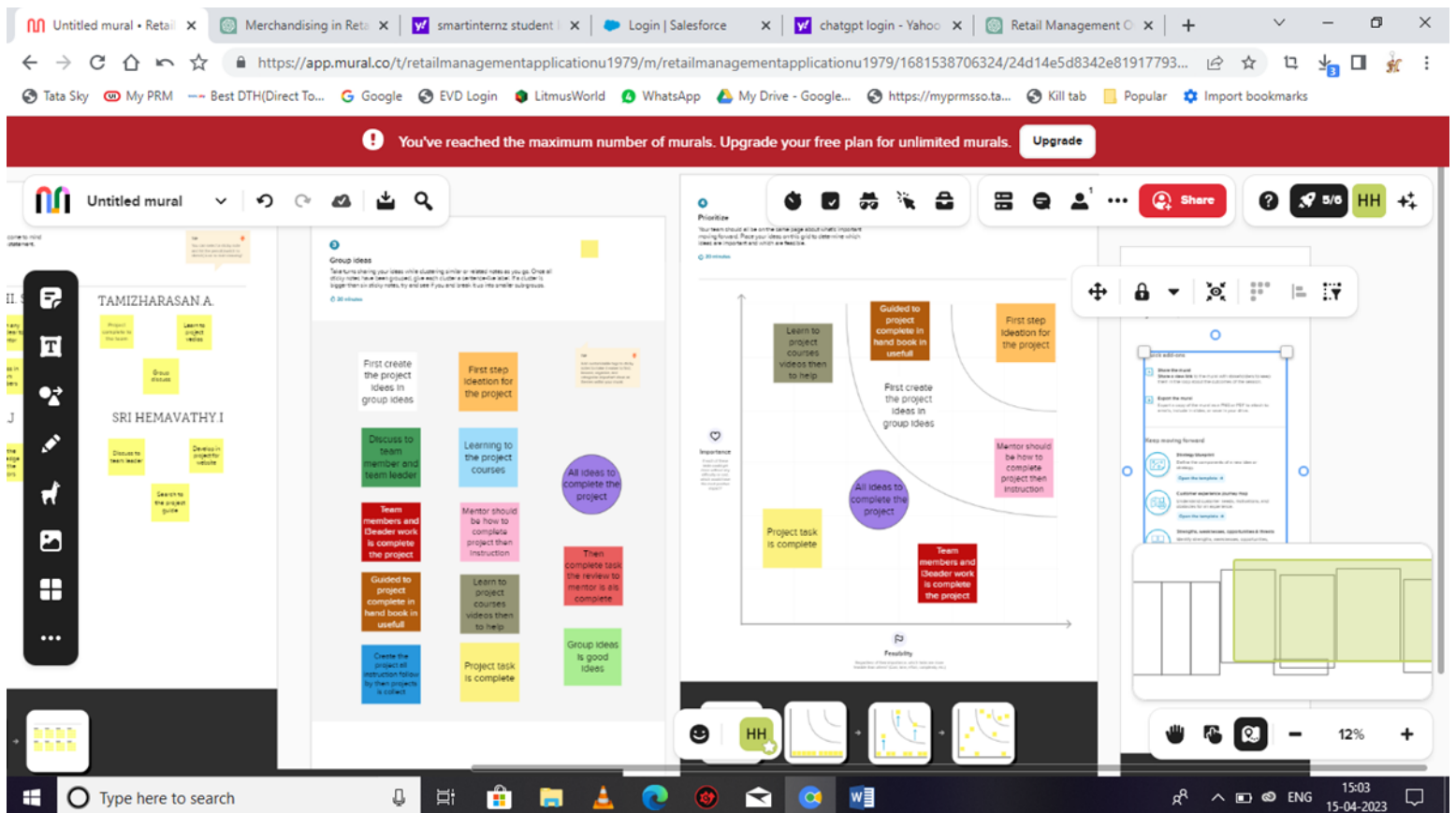
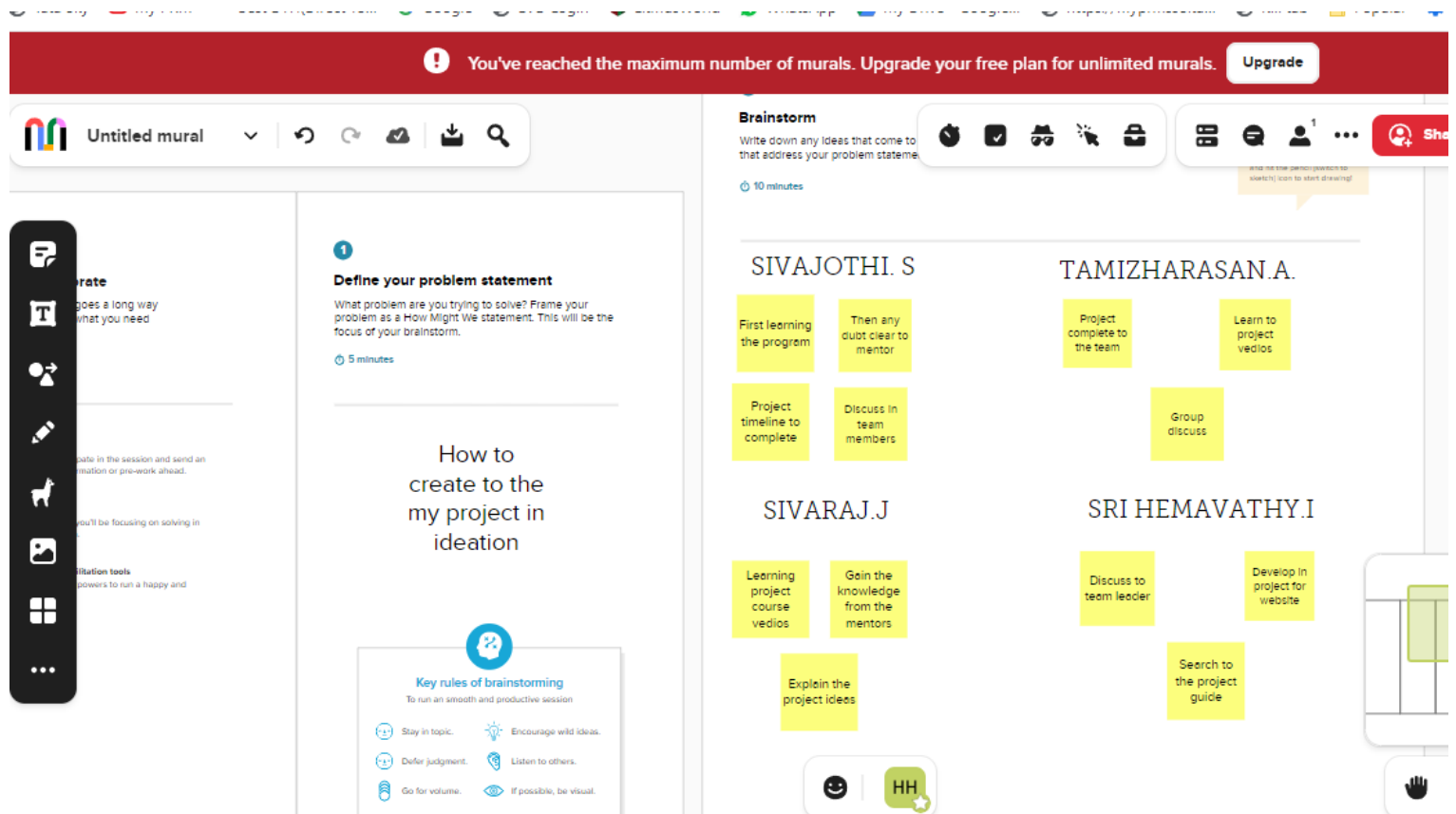
Need some inspiration?

See a finished version of this template to kickstart your work.

[Open example](#)



2.2 IDEATION & BRAINSTORMING MAP



3 RESULT

3.1 DATA MODEL:

Object name	Fields in the object	
Obj-1 1. Account	Field label	Data type
	Account name	Text (80)
Obj-2 2. Case	Field label	Data type
	Case name	Text (80)
Obj-3 3. Contact	Field label	Data type
	Contact name	Text (80)
Obj-4 4. Campaign	Field label	
	Campaign name	Text (80)

3.2 ACTIVITY AND SCREENSHOT

The screenshot displays the Salesforce Setup interface. At the top, there is a search bar labeled "Search Setup" and a navigation bar with tabs for "Setup", "Home", and "Object Manager". The "Object Manager" tab is selected, and the "Dispatch/Tracking" object is chosen. The left sidebar shows a list of configuration options: "Details", "Fields & Relationships", "Page Layouts", "Lightning Record Pages", "Buttons, Links, and Actions", "Compact Layouts", "Field Sets", "Object Limits", and "Record Types". The "Details" section is expanded, showing the following configuration details:

- Description: (empty field)
- API Name: Dispatch_Tracking_c
- Custom: (checked)
- Singular Label: Dispatch/Tracking
- Plural Label: Dispatch/Trackings
- Enable Reports: (checked)
- Track Activities: (checked)
- Track Field History: (checked)
- Deployment Status: Deployed
- Help Settings: (checked)

The bottom of the screen shows the Windows taskbar with various application icons and the system clock indicating 15:50 on 15-04-2023.

Setup

Home

Object Manager

Q tabs

User Interface

Rename Tabs and Labels

Tabs

Didn't find what you're looking for?

Try using Global Search.

SETUP

Tabs

New

What Is This?

Action	Label	Tab Style	Description
Edit Del	Dispatch/Trackings	Building	
Edit Del	Dispatch/Trackings.layout	Building Block	
Edit Del	Dispatched	Computer	
Edit Del	Expected date of delivery.	Caduceus	
Edit Del	Sales Order	Desk	
Edit Del	sales_order.layout	Big top	
Edit Del	Tracking ID	Bell	
Edit Del	Warehouse	Alarm clock	
Edit Del	Warehouse.page.layout	Alarm clock	

Setup

Home

Object Manager

Q user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

SETUP

Users

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

View: All Users

Edit | Create New View

A

B

C

D

E

F

G

H

I

J

K

L

M

N

O

P

Q

R

S

T

U

V

W

X

Y

Z

Other

All

New User

Reset Password(s)

Add Multiple Users

<input type="checkbox"/> Action	Full Name ↑	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatty_00d5i00000bxsfxeax_r0sgmeuogn3d@chatter.salesforce.com		✓	Chatter Free User
Edit	Hemavathy, Sri	SHema	hema@company.salesforce		✓	System Administrator
Edit	Hemavathy, Sri	shema	sriilango2003@gmail.com		✓	Standard User
Edit	User Integration	integ	integration@00d5i00000bxsfxeax.com		✓	Analytics Cloud Integration User
Edit	User Security	sec	insightssecurity@00d5i00000bxsfxeax.com		✓	Analytics Cloud Security User

Setup

Home

Object Manager

Q

Dispatch/Tracking

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

SETUP > OBJECT MANAGER

Dispatch/Tracking

Fields & Relationships

5 Items. Sorted by Field Label

Q Quick Find


New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Dispatched	Dispatched__c	Checkbox		<input type="checkbox"/>
Last Modified By	LastModifiedById	Lookup(User)		
Sales order	Sales_order__c	Master-Detail(Order)		✓ <input type="checkbox"/>
Tracking ID	Name	Text(80)		✓ <input type="checkbox"/>



Home
Opportunities
Leads
Tasks
Files
Accounts
Contacts
Campaigns
Reports
More

REPORT

Products with stock availability
Warehouse
Add Chart
Save & Run
Save
Close
Run

Outline
Filters

GROUP ROWS

Add group...

Product name

GROUP COLUMNS

Add group...

Columns

Product name

Warehouse: Warehouse name

Stock available

No records returned. Try editing report filters:

Show All warehouse.

Edit other filters in the filter panel.

Row Counts

Detail Rows

Subtotals

Grand Total

Team member 3- <https://trailblazer.me/id/tamia28>

5 ADVANTAGES

Increased Sales: Retail management can help increase sales by effectively managing inventory, pricing, and promotions. By having the right products in stock, pricing them competitively, and promoting them effectively, retailers can attract and retain customers, leading to increased sales.

Improved Customer Service: Effective retail management can also improve customer service. By training employees to provide excellent customer service and responding to customer feedback and complaints, retailers can improve the customer experience and build loyalty.

Efficient Operations: Retail management can help improve operational efficiency by streamlining processes, reducing waste, and improving productivity. This can lead to lower costs, higher profits, and a more competitive position in the market.

Better Inventory Management: Retail management can also help with inventory management, ensuring that the right products are in stock at the right time. This can reduce the risk of stockouts and overstocking, leading to better cash flow and profitability.

Data-Driven Decision Making: With the help of technology, retailers can collect and analyze data on customer behaviour, sales trends, and inventory levels. This data can be used to make informed decisions about pricing, promotions, and inventory management, leading to improved profitability and customer satisfaction.

DISADVANTAGES

High Operating Costs: Retail management can require significant investment in staffing, inventory, rent, and marketing. This can lead to high operating costs, which can be difficult to sustain, particularly for small and independent retailers.

Competition: Retail is a highly competitive industry, with many players vying for market share. This can make it challenging to differentiate oneself and attract and retain customers.

Shifting Consumer Preferences: Consumer preferences and behaviors can be unpredictable, particularly with the rise of e-commerce and the changing landscape of shopping habits. This can make it difficult for retailers to stay relevant and adapt quickly enough to changes in the market.

Seasonal Demand: Depending on the products and services offered, retailers may face seasonal fluctuations in demand. This can make it difficult to manage inventory levels and staffing, leading to inefficiencies and potentially lost revenue.

Dependence on Suppliers: Retailers are often dependent on suppliers for the products they sell. This can create challenges if suppliers raise prices or experience disruptions in their own operations, leading to potential supply chain issues for the retailer.

6 APPLICATIONS

Merchandising: Retail management involves creating and managing the product mix and layout in a retail store to maximize sales and profitability. This includes determining the assortment, quantity, pricing, and presentation of products.

Inventory Management: Retail management includes managing inventory levels, ordering and receiving products, tracking sales, and minimizing out-of-stock situations. This involves forecasting demand, managing inventory levels, and tracking sales data to ensure that the right products are available at the right time.

Customer Service: Retail management includes managing customer service, including training employees to provide excellent customer service, responding to customer feedback and complaints, and creating a positive customer experience.

Store Operations: Retail management includes managing store operations, including staffing, scheduling, payroll, and store maintenance. This involves ensuring that the store is clean, well-stocked, and organized, and that employees are trained to handle daily operations.

Sales and Marketing: Retail management involves creating and executing sales and marketing strategies, including advertising, promotions, and special events. This includes creating a brand identity, promoting the store and its products, and developing relationships with customers to drive sales.

CONCLUSION

In conclusion, retail management is a critical function that involves managing various aspects of a retail business, including inventory management, customer service, merchandising, sales and marketing, and store operations. Effective retail management can help retailers increase sales, improve customer satisfaction, and operate efficiently. However, there are also challenges associated with retail management, including high operating costs, competition, and shifting consumer preferences. Despite these challenges, retail management continues to be an essential aspect of the retail industry, and retailers who invest in effective retail management strategies are likely to see improved performance and profitability.

FUTURE SCOPE

E-commerce: The growth of online shopping is likely to continue, and retailers will need to adapt their retail management strategies to include online sales and marketing.

Data Analytics: Retailers will increasingly use data analytics to inform decision-making, improve customer experience, and optimize operations.

Omnichannel Retailing: Retailers will continue to invest in omnichannel retailing, integrating online and offline channels to create a seamless shopping experience for customers.

Personalization: Retailers will use data and technology to personalize the shopping experience for customers, tailoring products and services to individual preferences and needs.

Sustainability: Retailers will increasingly focus on sustainability, adopting environmentally friendly practices and products to appeal to environmentally conscious consumers.

Automation: Retailers will increasingly adopt automation to improve operational efficiency, reduce costs, and enhance the customer experience.

Overall, the future of retail management is likely to be shaped by technological advancements, changing consumer preferences, and the need for retailers to remain competitive in an ever-evolving retail landscape. Retailers who embrace these trends and invest in effective retail management strategies are likely to succeed in the years ahead.
