

RETAIL MANAGEMENT APPLICATION USING SALESFORCE

Introduction

1.1 Overview

Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don't know where you should start on your learning journey? If you've answered yes to any of these questions, then you're in the right place. This module is for you.

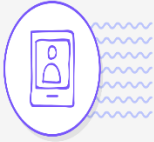
Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module, we'll take you through these features and answer the question, "What is Salesforce, anyway?"

1.2 Purpose

RMS can help retailers streamline all the process of running a store, from procurement to sales and back-office activities such as accounting and human resources.

2 Problem Definition & Design Thinking

2.1 Empathy Map



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.

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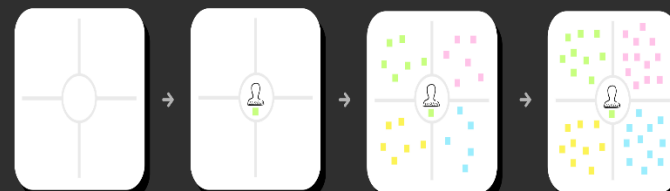
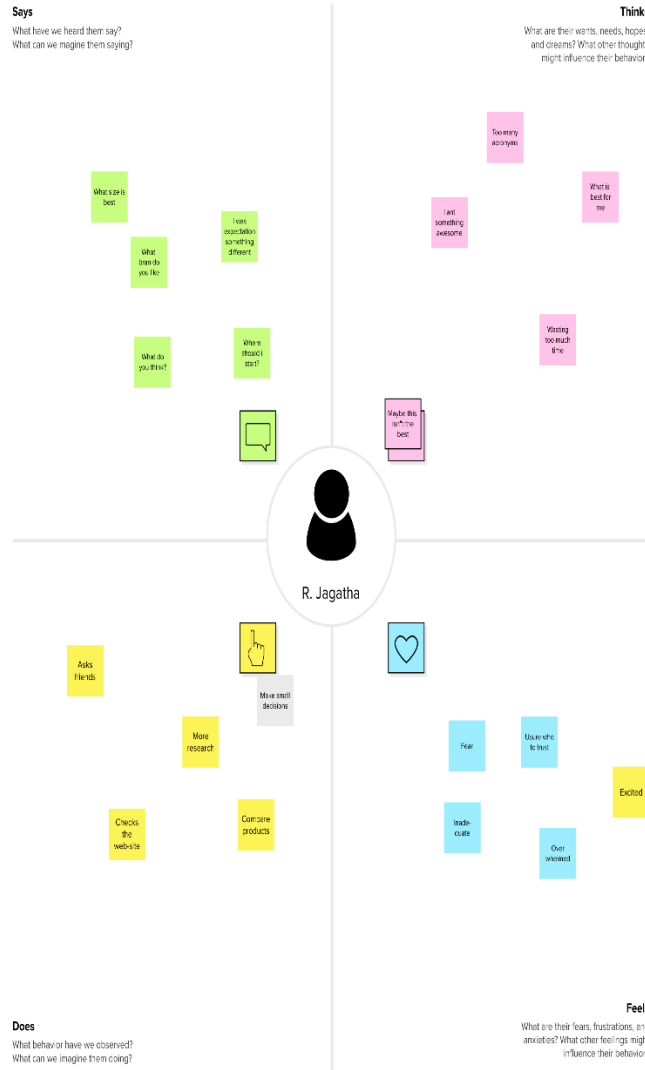


Need some inspiration?
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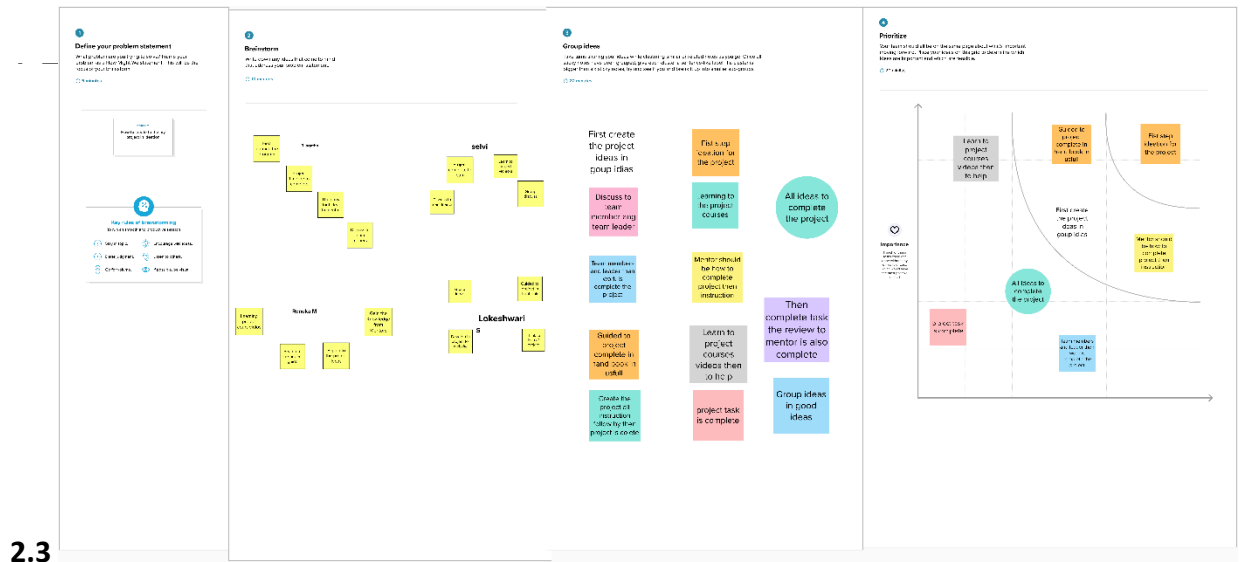


Build empathy

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



2.2 Ideation & Brainstorming Map



2.3

Paste the Ideation & brainstorming map screenshot

3 RESULT

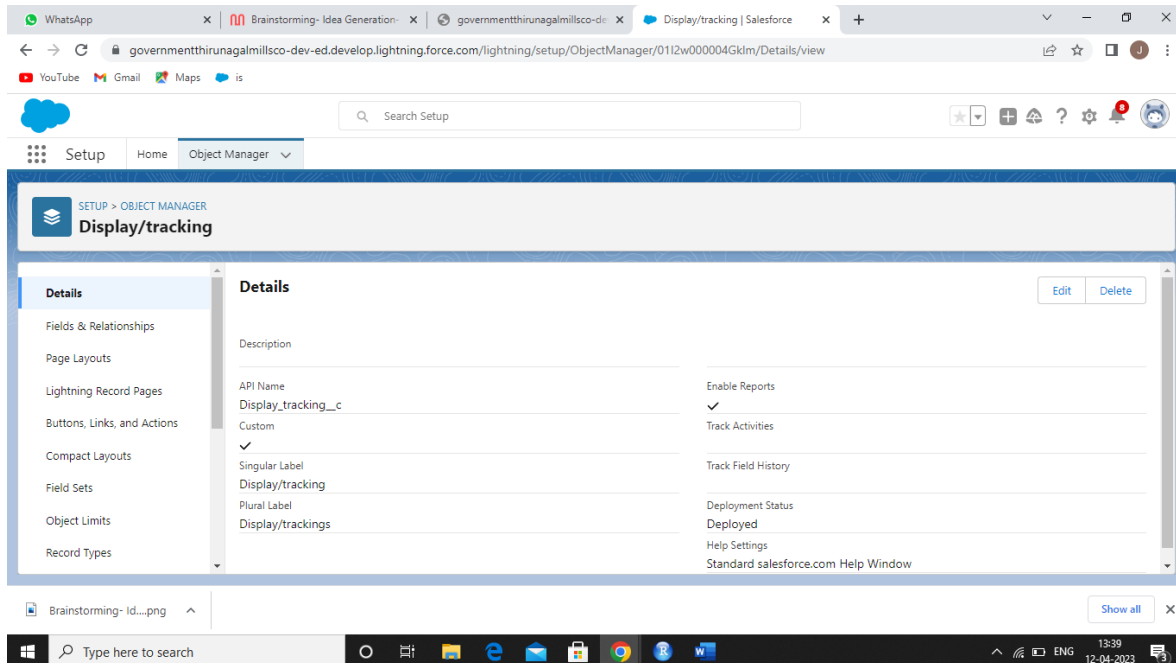
3.1 Data Model:

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	Data type
	Campaign Name	Text(80)

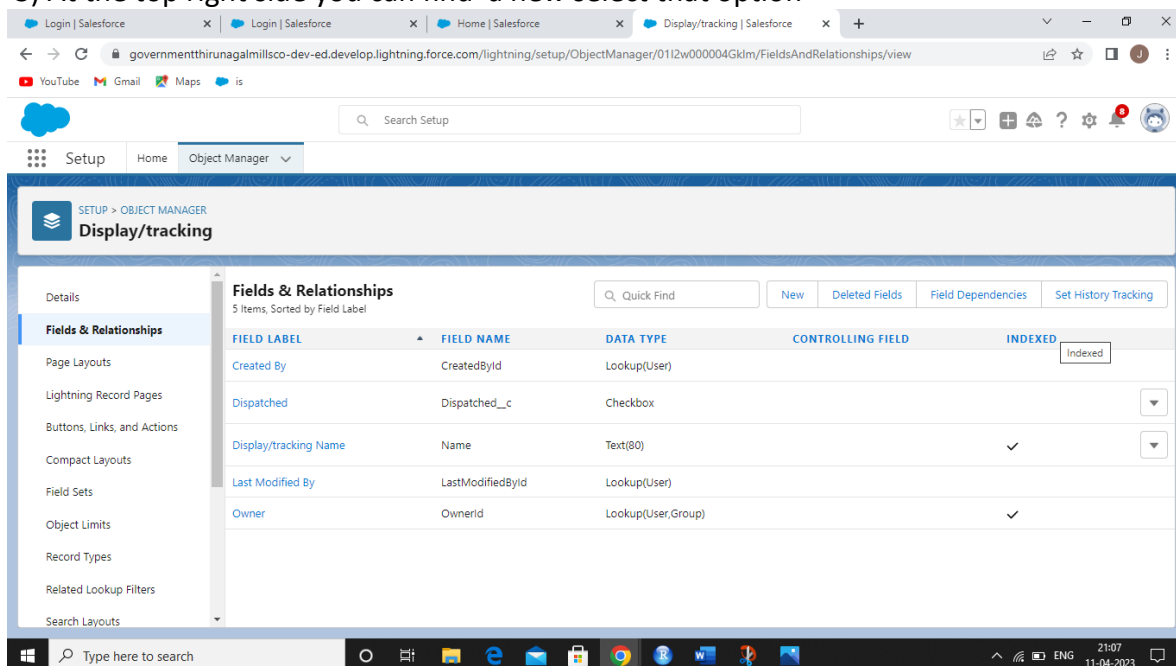
Milestone-1 Objects:

Creation of fields on Dispatch/tracking

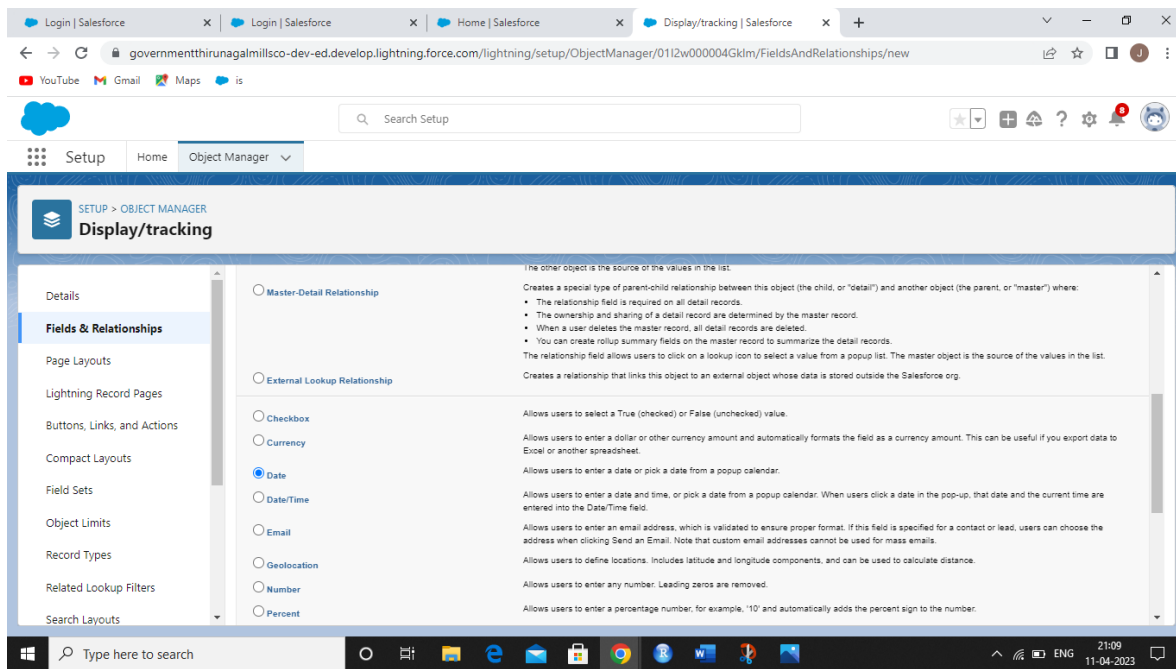
- 1) Select your object from object selection has Dispatch/Tracking.



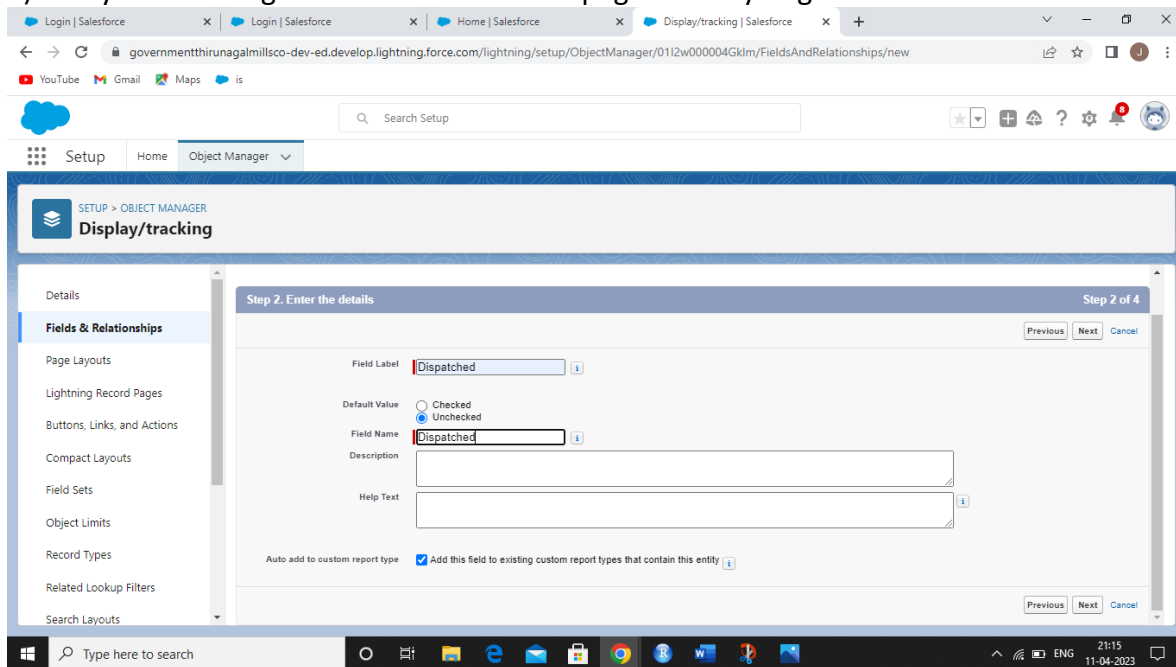
- 2) And select the option fields and relationships.
- 3) At the top right side you can find a new select that option



4) Now you have to select data type, Checkbox Has data type.



5) And you will navigate to enter the details page where you give the field label.



6) And give the label name has Dispatched

7) At the bottom of the object you can find options like required, unique, external id select required option so that always require a value in this field in order to save.

8) Click next you will navigate to field level security click on visible checkbox so that it is visible to all profiles.

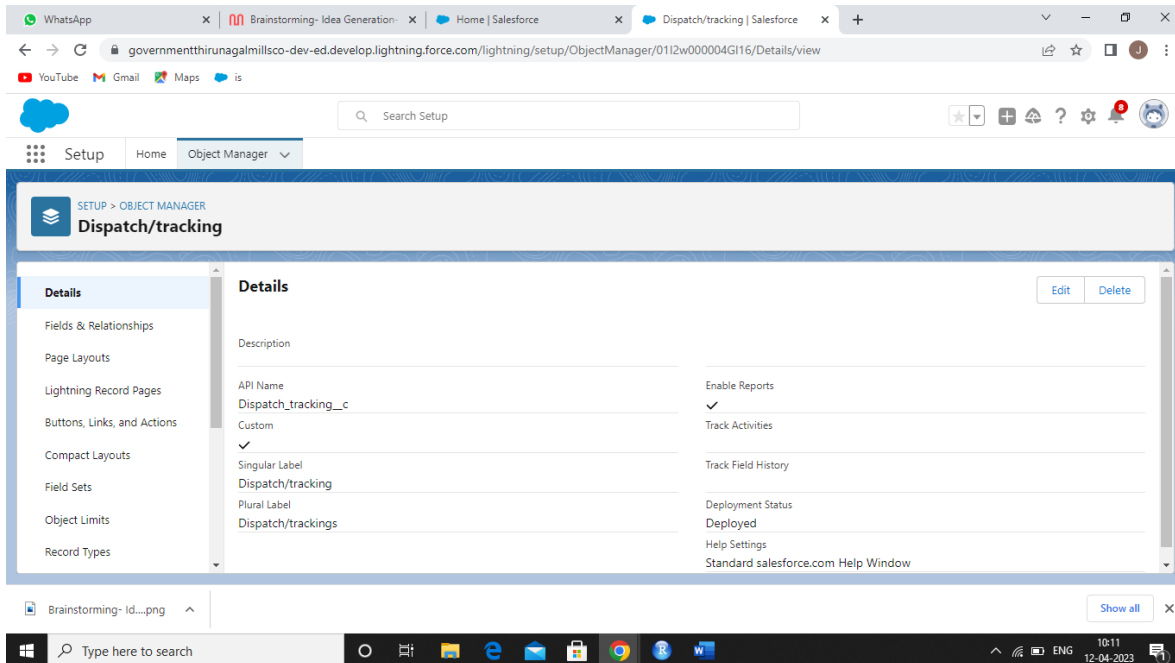
9) Select the next option, select the page layout and save it.

Milestone-2 Relationship b/w objects:

Creation of relationships between objects

To create a Master Detail relationship between Dispatch/tracking and sales order.

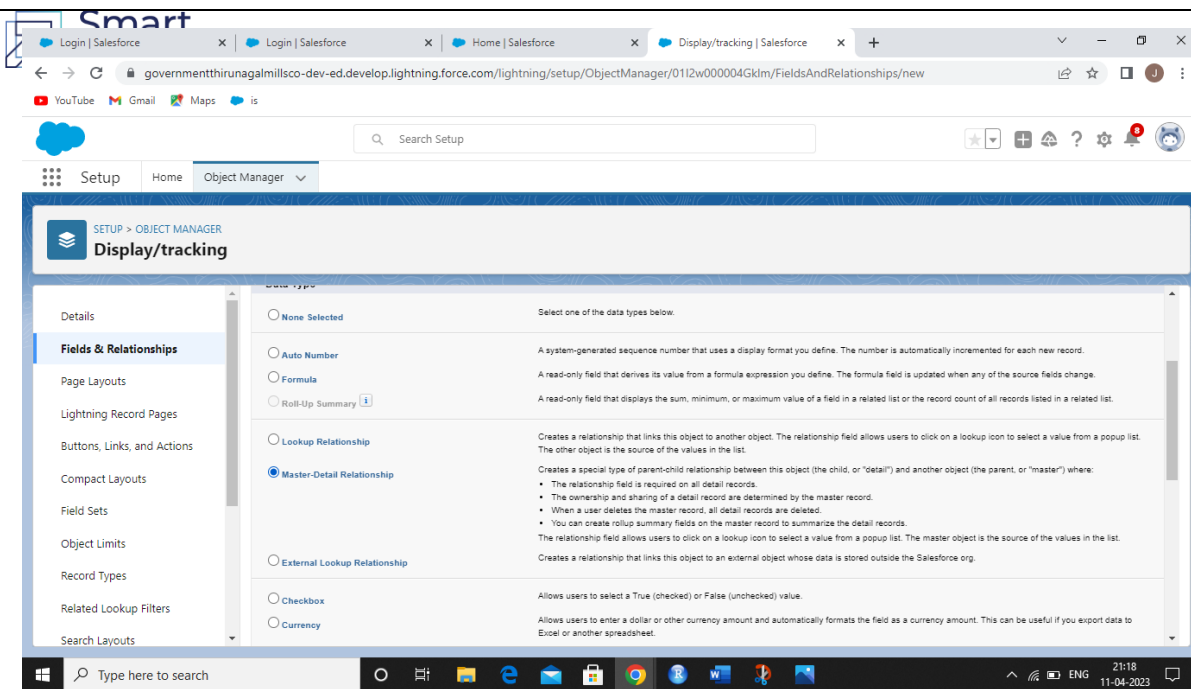
1) Go to the Set Up option from the Home Page and click on it.



2) Go to the object manager and select 'Dispatch/tracking' object from the list

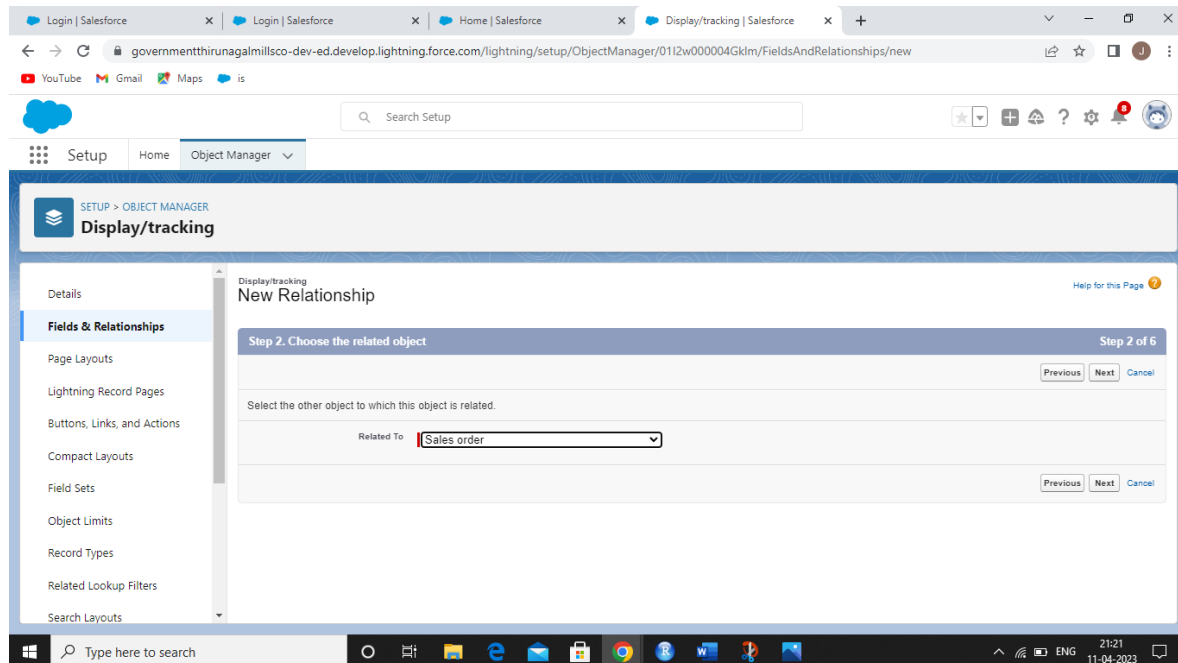
3) And select fields and relationships and click on new.

4) Select the data type has Master detail relationship



5) And select related to the object has sales order, and click on next.

6) You will navigate to the label name page where you give the label name for the field, give it has sales order and click next.



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

Mileston-5 Layouts:

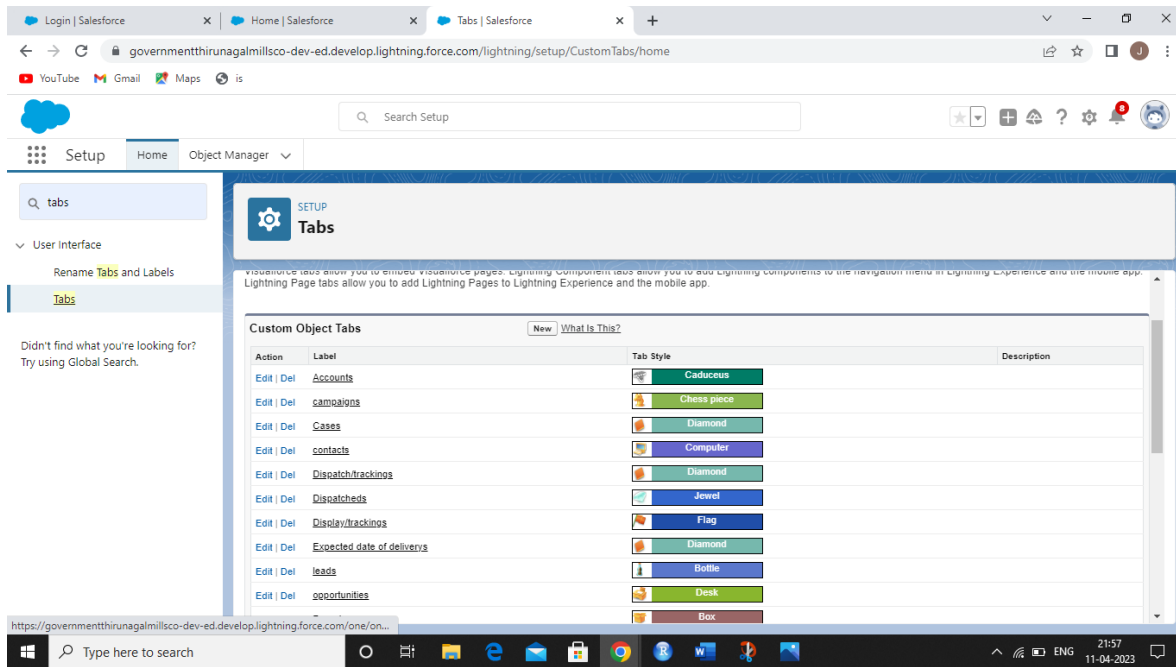
Creation of custom Tabs

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 Warehouse.

4) For Tab Style, select any icon.



5) Leave all defaults as is. Click Next, Next, and Save.

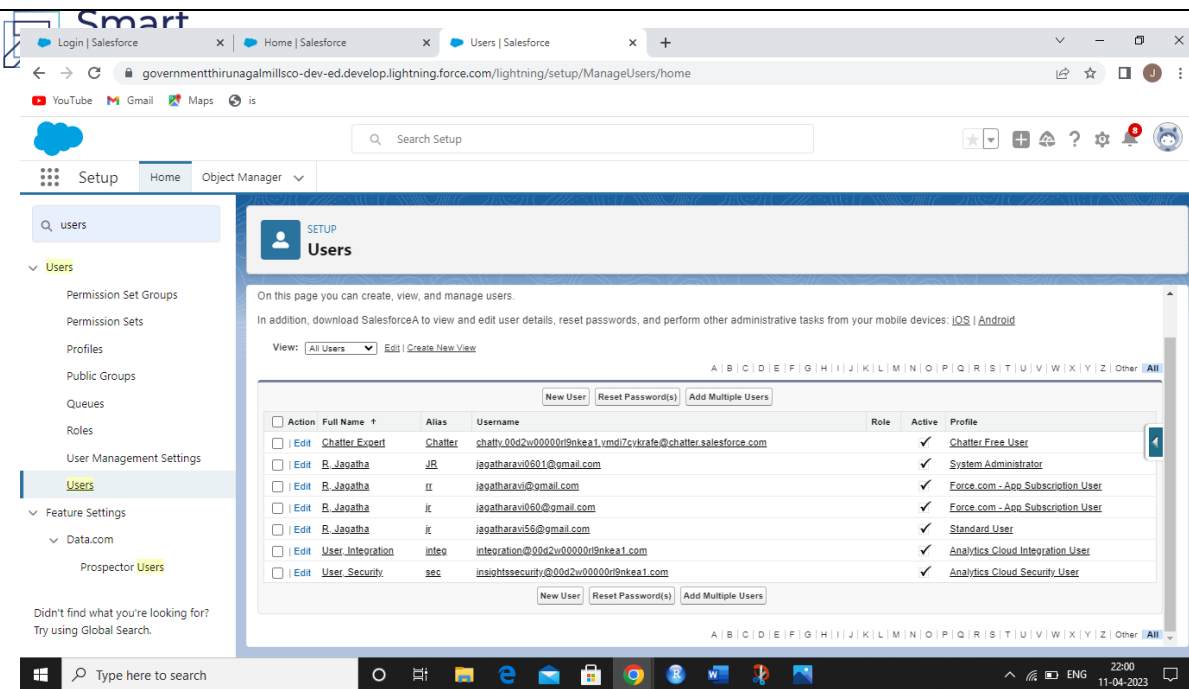
6) In the same way create other objects such as students and parents

Milestone-6 User:

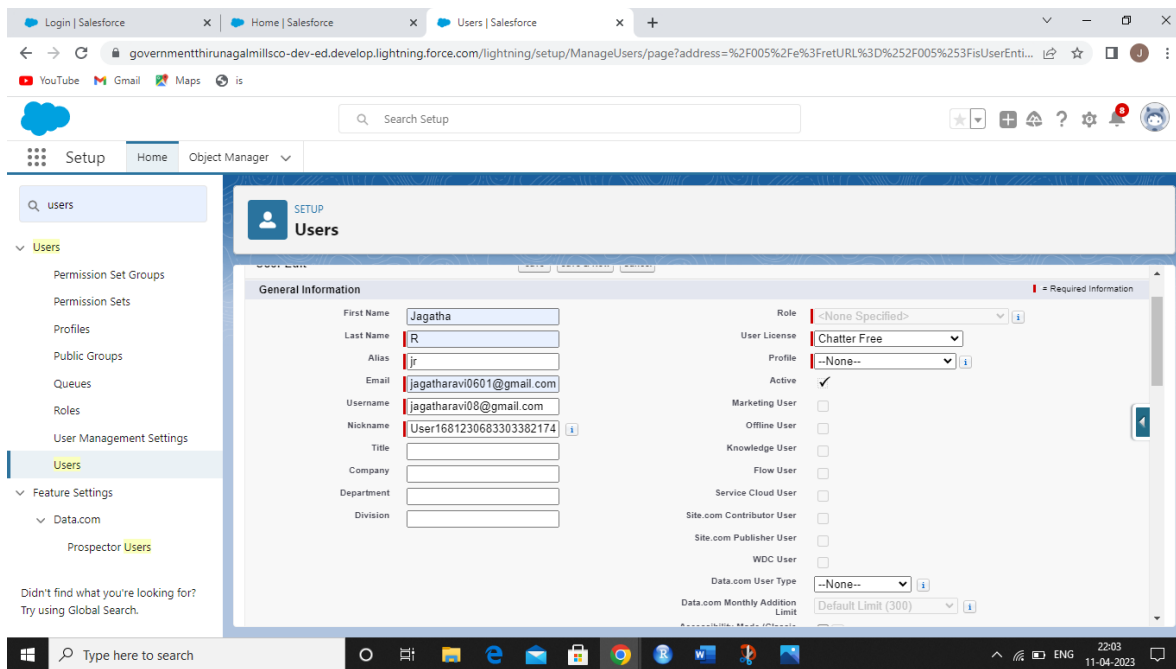
Creation of user

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 salesforce.
- 7) In the profile field select standard platform profile

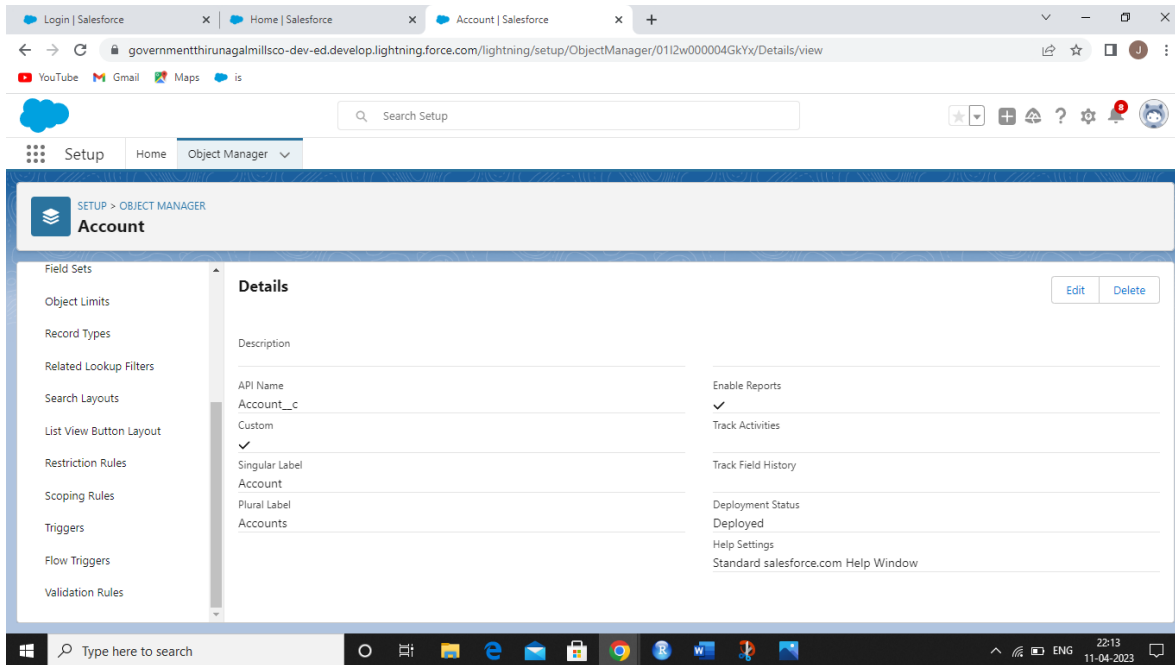


- 8) At the bottom of the page check the box to generate a new password and notify the user immediately.

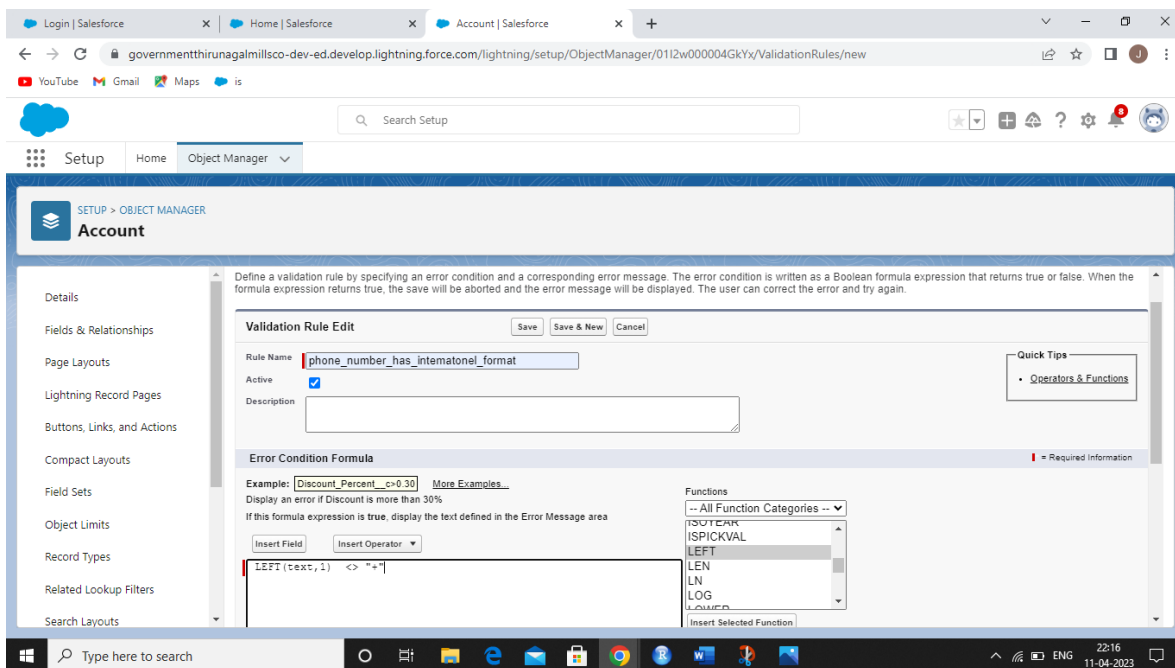
Milestone-7 Validation Rules

Creation of validation rule

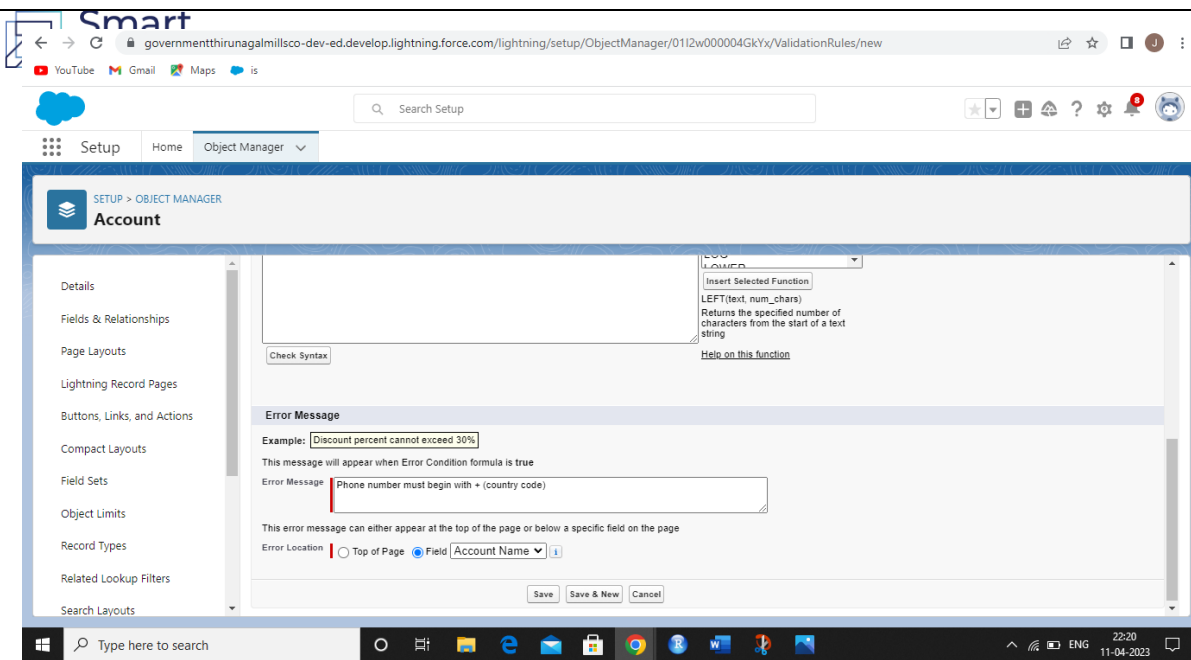
- 1) Navigate to object manager and select Account object.
- 2) In details section scroll down and find validation rule in it



- 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 + (country code).
- 5) In error location select top of the field.



4 Trailhead Profile Public URL

Team Lead - <https://trailblazer.me/id/jagar81>

Team Member 1 - <https://trailblazer.me/id/jagar81>

Team Member 2-- <https://trailblazer.me/id/jagar81>

Team Member 3 – <https://trailblazer.me/id/jagar81>

5. ADVANTAGES

- **Requires Less Capital**
- **More Profit Margin Than Wholesalers**
- **Better Customer Relation**
- **Credit Facility**
- **No Liability Towards The Buyers**

DISADVANTAGE

- **Requires More Marketing Costs**
- **Good Selling Skill Is Required**
- **High Competition**
- **No Benefit of Bulk Buying**

6. APPLICATIONS

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

7. CONCLUSION

Consumers are always hungry for modern way of shopping. Indian retail sector and its employment potential is growing fast. Like Spencer, Big bazaar, Reliance fresh etc, are tapping customers by creating point of sales displays. so we can say that India is a rising star and going to be one of the fastest growing regions of the fastest growing region of the future.

8. FUTURE SCOP

Salesforce training would be a natural choice, as more and more businesses are adopting salesforce for their Customer Relationship Management (CRM) and marketing plans. You may also be an ecommerce practitioner or sales executive with a stagnant career path, exploring an upskilling course.