

Retail Management Application Using Salesforce

GOVERNMENT ARTS COLLEGE FOR WOMEN

SALEM-8

Team ID : NM2023TMID16146

Team Size : 4

Team Leader : KOWSIKA. S

NM_ID: E8C715CF4574C888AF6418BBDDD35D16

Team member : KAVIYA.K

NM_ID:

2C3A2F3E6CDA6AEB1A9465666D241A52

Team member : LEKASRI.L

NM_ID: 1C67690778CB5B99A24

08EAAC7AE733

Team member : MAHALAKSHMI.S

NM_ID: 3E0FC5B0C765A5C9F814032B339BC54
9

1 INTODUCTION

1.1 Overview

Retailing encompasses the business activities involved in selling goods and services to consumers for the personal, family, or household etc. A CRM product owner has requested to create two applications, one is a sales app for reps to use this application and store customer 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. It includes everything from increasing your

coustomer pool to how products are presented, and how you fulfill a coustomer's needs. A good store manager helps customers leave the store with a smile.

1.2 Purpose

- Automating Customer Relationship
- Creating and Managing Contacts
- Traking Sales Leads

Salesforce can help retailers manage customer relationships by automatically creating contact recods, sending shipping notifications, and keeping track of order status. It can also create and manage

contracts by automatically tracking terms, deadlines, and payments. And lastly, Salesforce can help retailers track sales leads by automatically filling out customer profiles, generating lead lists, and up with customers.

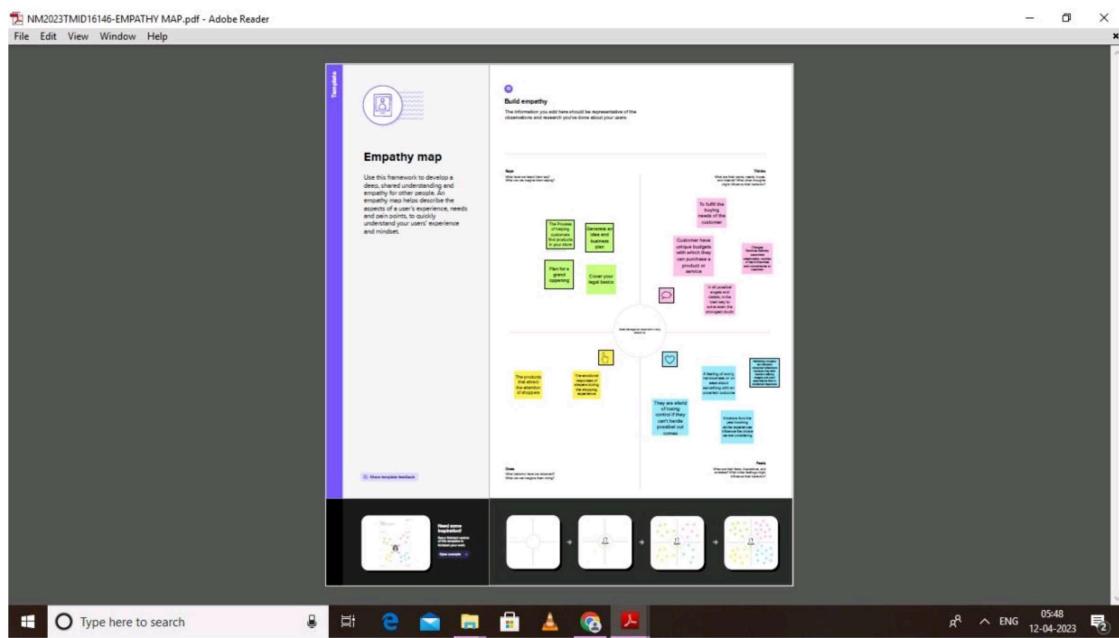
1.3 Objective

- Review
- To explore the scope of retail promotion
- To study the elements of retail promotion: advertising, public relations, personal selling, and sales promotion.
- To discuss the strategic aspects of retail promotion: objectives, budgeting, the mix of forms,

implementing the mix, and reviewing and revising the plan

2 Problem Definition & Design Thinking

2.1 Empath Map



2.2 Ideation & Brainstorming Map

File Edit View Window Help

Brainstorm & idea prioritization

Before you collaborate

Brainstorm

After you collaborate

Share template feedback

200.00 x 68.44 in

Type here to search

R ENG 05:48 12-04-2023

File Edit View Window Help

Brainstorm & idea prioritization

Before you collaborate

Brainstorm

After you collaborate

Share template feedback

200.00 x 68.44 in

Type here to search

R ENG 05:48 12-04-2023

3 RESULT

3.1 Data Model

Object Name	Fields in the Object					
Campaign	<table border="1"><thead><tr><th data-bbox="799 1035 1091 1203">Field Lable</th><th data-bbox="1091 1035 1352 1203">Data Type</th></tr></thead><tbody><tr><td data-bbox="799 1203 1091 1372">Campaign Name</td><td data-bbox="1091 1203 1352 1372">Text(80)</td></tr></tbody></table>		Field Lable	Data Type	Campaign Name	Text(80)
Field Lable	Data Type					
Campaign Name	Text(80)					

Leads	<table border="1"> <tr> <td data-bbox="798 444 1075 613">Field Lable</td><td data-bbox="1075 444 1344 613">Data Type</td></tr> <tr> <td data-bbox="798 613 1075 792">Lead Source</td><td data-bbox="1075 613 1344 792">Piclist</td></tr> </table>	Field Lable	Data Type	Lead Source	Piclist
Field Lable	Data Type				
Lead Source	Piclist				
Accounts	<table border="1"> <tr> <td data-bbox="798 1039 1075 1208">Field Lable</td><td data-bbox="1075 1039 1344 1208">Data Type</td></tr> <tr> <td data-bbox="798 1208 1075 1388">Account Name</td><td data-bbox="1075 1208 1344 1388">Name</td></tr> </table>	Field Lable	Data Type	Account Name	Name
Field Lable	Data Type				
Account Name	Name				

Contacts	<table border="1"> <thead> <tr> <th data-bbox="798 444 1080 608">Field Lable</th><th data-bbox="1080 444 1344 608">Data Type</th></tr> </thead> <tbody> <tr> <td data-bbox="798 608 1080 788">Contact Name</td><td data-bbox="1080 608 1344 788">Phone</td></tr> </tbody> </table>	Field Lable	Data Type	Contact Name	Phone
Field Lable	Data Type				
Contact Name	Phone				
Opportunities	<table border="1"> <thead> <tr> <th data-bbox="798 945 1080 1109">Field Lable</th><th data-bbox="1080 945 1344 1109">Data Type</th></tr> </thead> <tbody> <tr> <td data-bbox="798 1109 1080 1372">Opportun -ties Name</td><td data-bbox="1080 1109 1344 1372">Text(20)</td></tr> </tbody> </table>	Field Lable	Data Type	Opportun -ties Name	Text(20)
Field Lable	Data Type				
Opportun -ties Name	Text(20)				

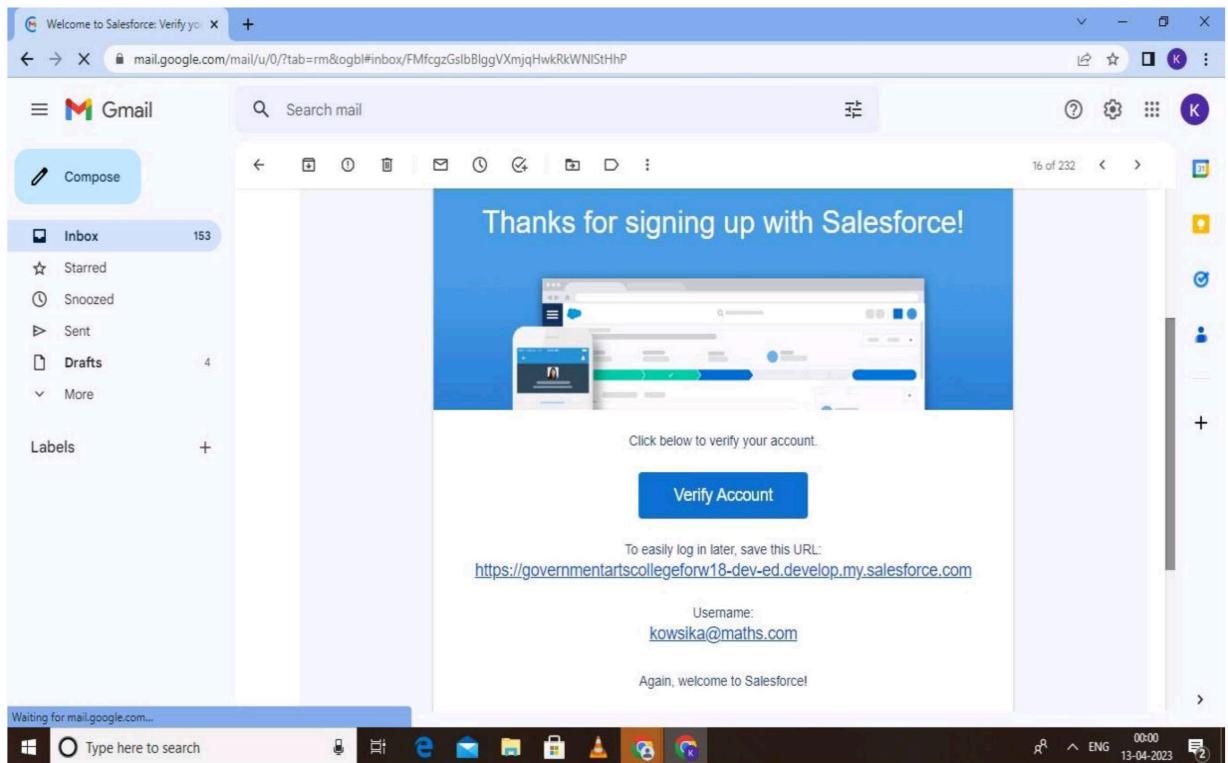
Products	<table border="1"> <thead> <tr> <th data-bbox="771 444 1044 608">Field Lable</th><th data-bbox="1044 444 1318 608">Data Type</th></tr> </thead> <tbody> <tr> <td data-bbox="771 608 1044 795">Product Name</td><td data-bbox="1044 608 1318 795">Text(80)</td></tr> </tbody> </table>	Field Lable	Data Type	Product Name	Text(80)				
Field Lable	Data Type								
Product Name	Text(80)								
Warehouse	<table border="1"> <thead> <tr> <th data-bbox="771 947 1044 1111">Field Lable</th><th data-bbox="1044 947 1318 1111">Data Type</th></tr> </thead> <tbody> <tr> <td data-bbox="771 1111 1044 1298">Product Name</td><td data-bbox="1044 1111 1318 1298">Text(30)</td></tr> <tr> <td data-bbox="771 1298 1044 1484">Stock Available</td><td data-bbox="1044 1298 1318 1484">Text(30)</td></tr> <tr> <td data-bbox="771 1484 1044 1648">Record Type</td><td data-bbox="1044 1484 1318 1648">Record Type</td></tr> </tbody> </table>	Field Lable	Data Type	Product Name	Text(30)	Stock Available	Text(30)	Record Type	Record Type
Field Lable	Data Type								
Product Name	Text(30)								
Stock Available	Text(30)								
Record Type	Record Type								

Sales Order		
	Field Lable	Data Type
	Sales Order	Master-Detail(Sales Order)
Tracking		
	Field Lable	Data Type
	Dispatched	Checkbox

Mailstone-1

Activity-1

Creating Developer Account



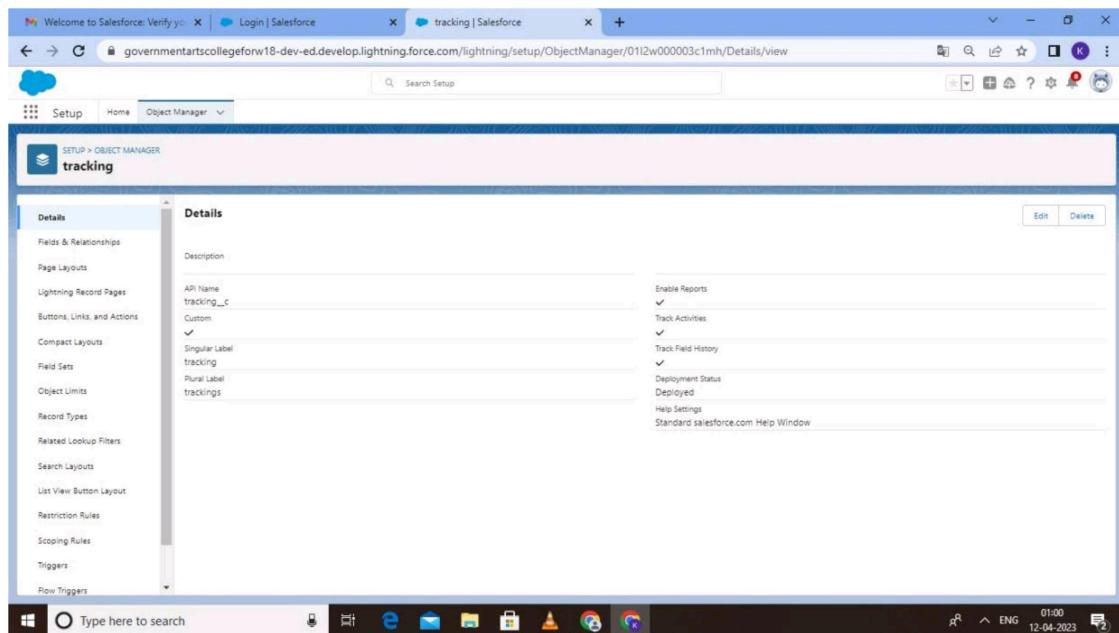
Mailstone-2

3.2. Activity & Screenshot

Activity-1

Creation of object tracking

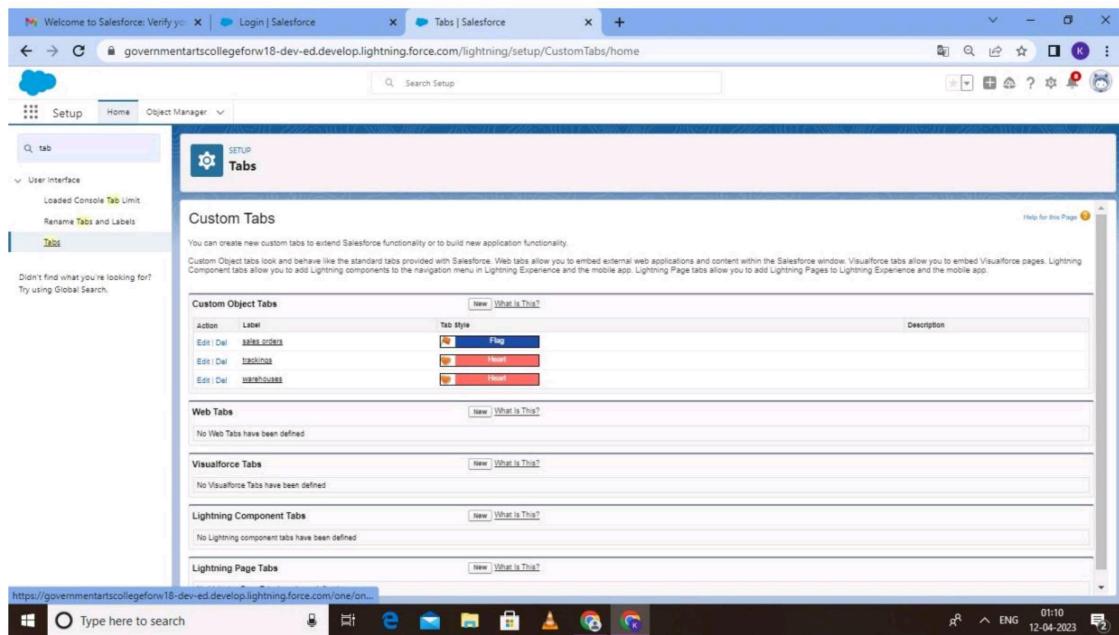
Click new coustom object, creat new coustom tab for object Tracking



Creation of Coustom Tab

After Creation of Coustom object and navigate to the new coustom object tab And select tab style and click on next and navigated to the profiles default and click

next the object will be available in all objects and select save option.



Activity-2

Fields available on tracking

Select your object from object selection has tracking and select field and relationships select new option select data type checkbox and navigated to enter detail

page and give the field label name and click next option select page layout and save it.

The screenshot shows the Salesforce Setup interface with the URL governmentartscollegeforw18-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lw000003c1mh/FieldsAndRelationships/view. The page title is "tracking". The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main content area is titled "Fields & Relationships" and displays a table of fields for the "tracking" object. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are:

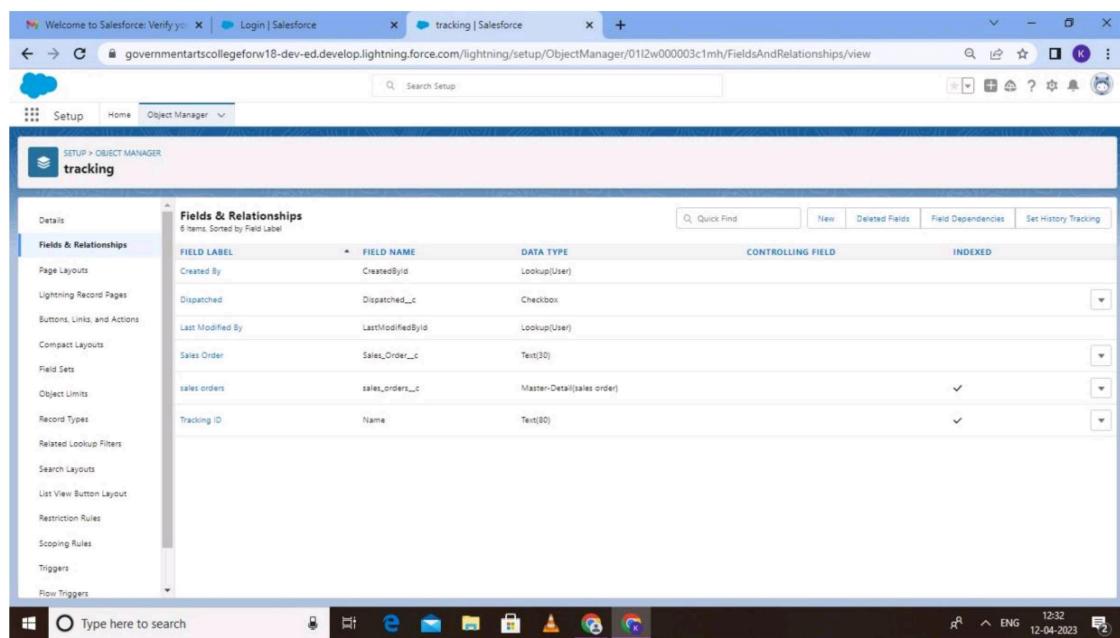
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Dispatched	Dispatched__c	Checkbox		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Sales Order	Sales_Order__c	Text(20)		
Tracking ID	Name	Text(80)		✓

Milestone-3 Relationship b/w objects:

Activity-1

Creation of relationships between objects

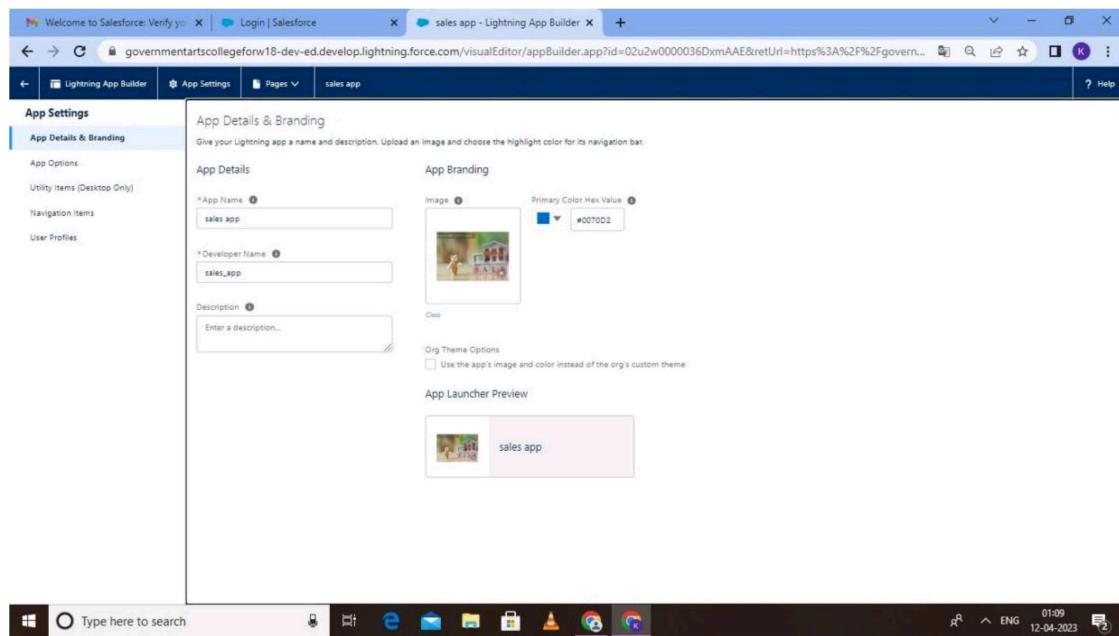
To create a Master Detail relationship between tracking and sales order go to object to select tracking and click field and relationship select the data type has Master detail relationship and object has sales order and click and save it



Milestone-4 Application:

Activity-1 Creation of Application

Search for app manager select new lighting app app name Sales App upload the picture select objects and system admin profile available items to select items.

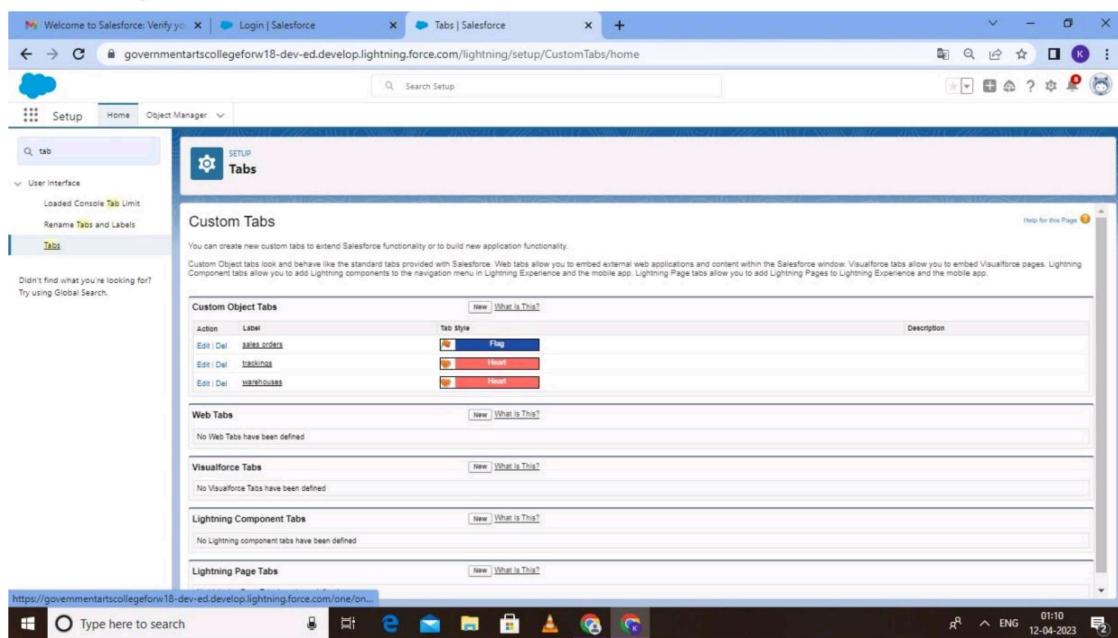


Milestone-5 Layouts:

Activity-1

Creation of custom Tabs

Create of New custom Tab under Custom Object Tabs click new select warehouse and tab style select icon click Next and save

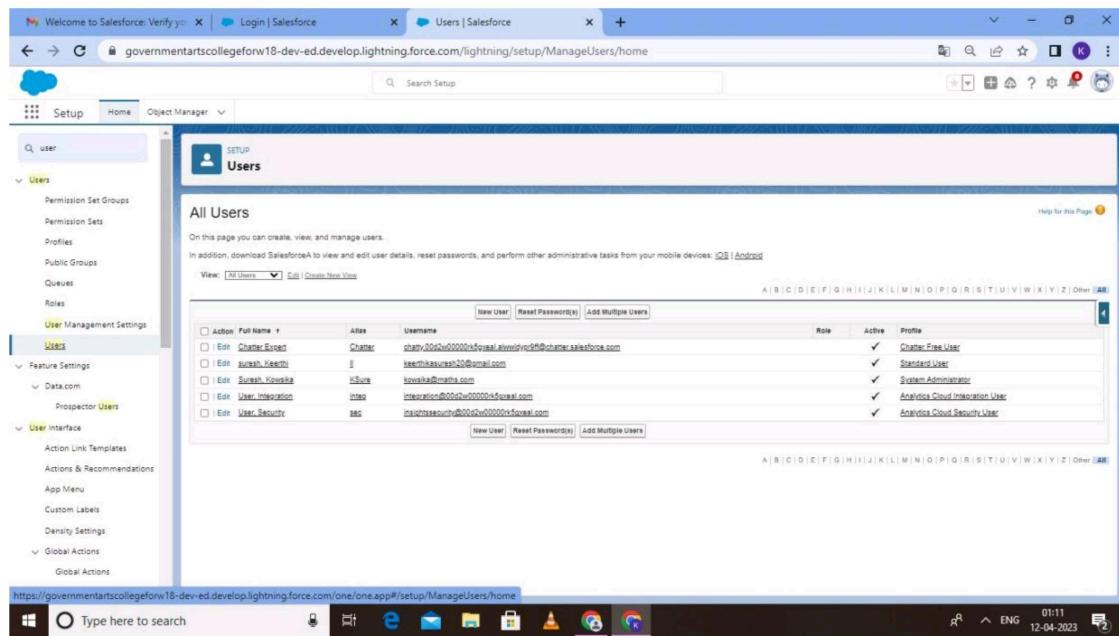


Milestone -6 User:

Activity-1

Creation of User:

Navigate to the quick find search bar type user and select it and click on new user Give the all details and select the user license of sales force. At the bottom of the page check the box to generate a new password and notify the user immediately.

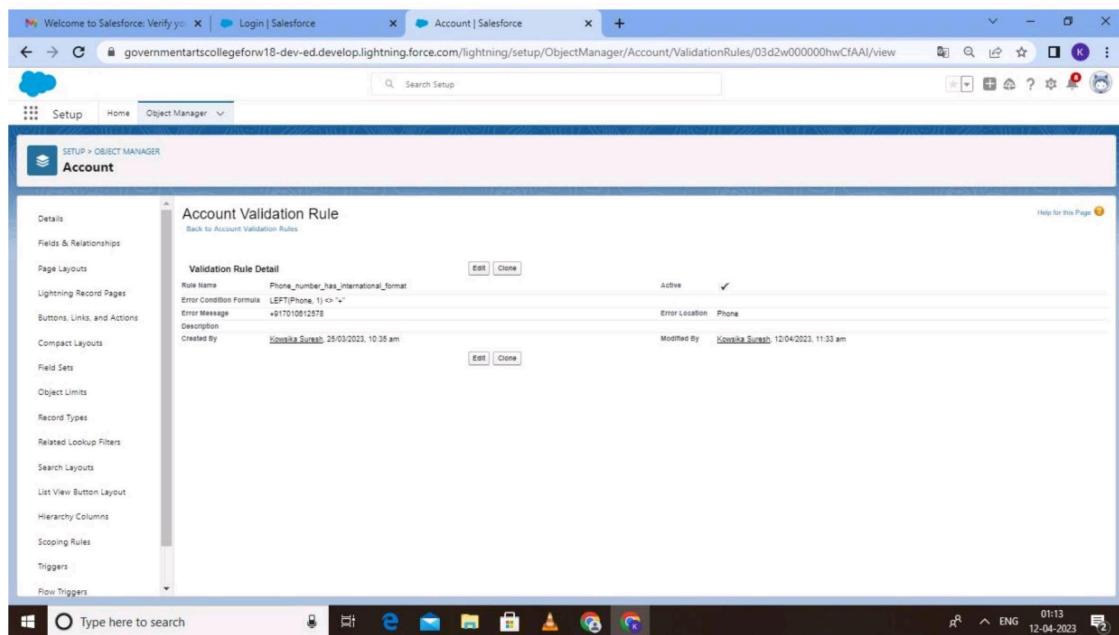


Milestone-7 Validation Rules:

Activity-1

Creation of validation rule

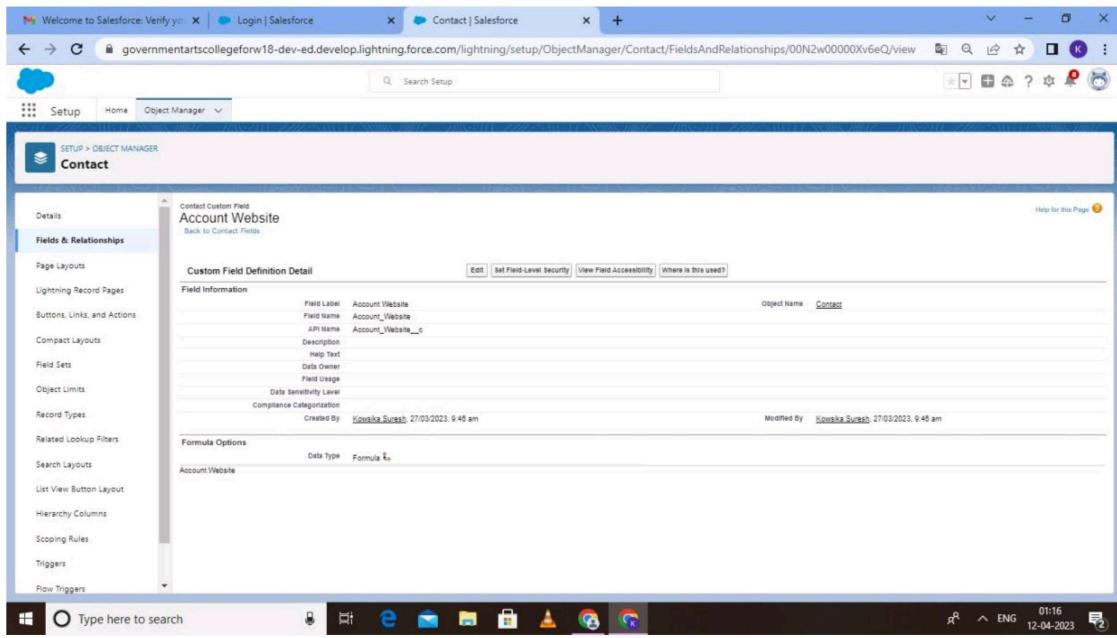
Navigated to object manager and select Account object fin validation rule click new edit error conditional formula give the formula click save.



Activity-2:

Cross Object Formula

Creation of cross object , object selection has contact click fields and relationship and data type formula give the detail page where you give the field lable and lable name has Account website click next and save.



Milestone-8 Reports:

Activity:
Creation of Report

Click app launcher and search for reports
select new report ans click report type
warehouse group rows and columns
Product Name, werehouse Name and stock

Available and filter pane created date select all time lable name Product with Stock Availability click save and run

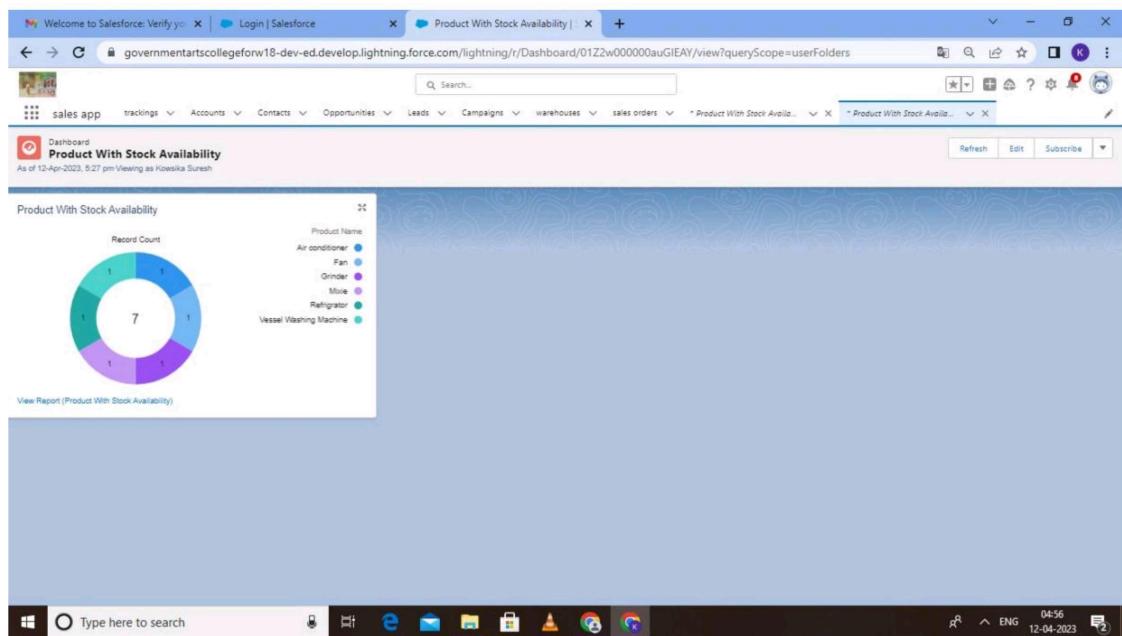
The screenshot shows a Salesforce report titled "Report: warehouses Product With Stock Availability". The report displays a table of data with columns: "Product Name-2", "warehouse: warehouse Name", and "Stock Available". The data is grouped by product and subtotalled. The products listed are Air conditioner, Fan, Grinder, Mixer, Refrigerator, and Washing Machine, each with multiple warehouse locations and their respective stock counts.

Product Name-2	warehouse: warehouse Name	Stock Available
Air conditioner (1)	Hyderaoad	1
Subtotal		
Fan (1)	Kolkata	1
Subtotal		
Grinder (1)	salem	1
Subtotal		
Mixer (1)	Ooty	1
Subtotal		
Refrigerator (1)	Chennai	1
Subtotal		
Washing Machine	Karlaikurichi	1
Subtotal		
Washing Machine (1)	Mumbai	1
Subtotal		
Total (7)		

Milestone-9 Dashboards:

Activity
Creation of Dashboard

Click app launcher search dashboards
select new dashboard has name Product
with stock Availability and to creat add
component and for report select chart in
display as section click add and save the
dashboard.



4 Trailhead Profile Public URL

Team Lead- <https://trailblazer.me/id/ksuresh73>

Team Member-1

<https://trailblazer.me/id/lesri4>

Team Member-2

<https://trailblazer.me/id/eelakkiya1>

Team Member-3

<http://trailblazer.me/id/msakathi>

Retail Management Application Using Salesforce

/

5 ADVANTAGES & DISADVANTAGE

Advantages:

- Sales reps understand the needs of their customers and builds stronger relationships
- Management control can be strategically allocated to different markets

Disadvantages:

- Higher costs
- Geographic duplication

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

In conclusion, salesforce is a powerful platform that can help retailers meet the demands of the rapidly changing retail landscape. With its advanced customer engagement, data management, inventory management, omnichannel experience, and collaboration capabilities, salesforce is a must-have for any retail business looking to stay ahead of the competition.

8 FUTURE SCOPE

A vibrant business with a wide range of sectors, retailing is home to some of the

biggest corporations in the world. Candidates with background in retail management might begin their careers in management, administration, sales, goods shipment, and client communication. Around the, there are more than 2 million job opening in Retail management application using salesforce.