

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.

First Name*
p

Last Name*
Yukeswaran

Email*
pyukeswaran7815@gmail.com

Role*
Developer

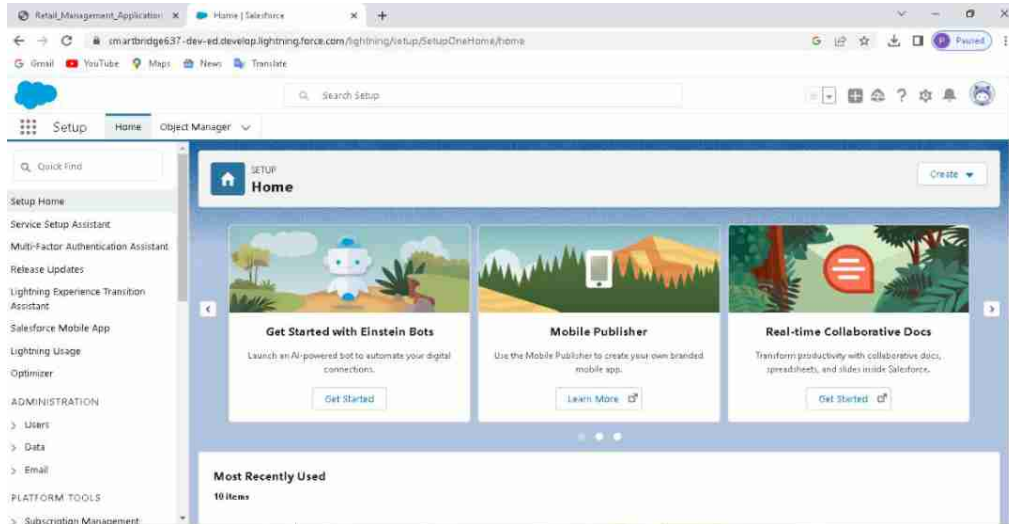
Company*
yukes IT

Country/Region*
India

Postal Code*
621 316

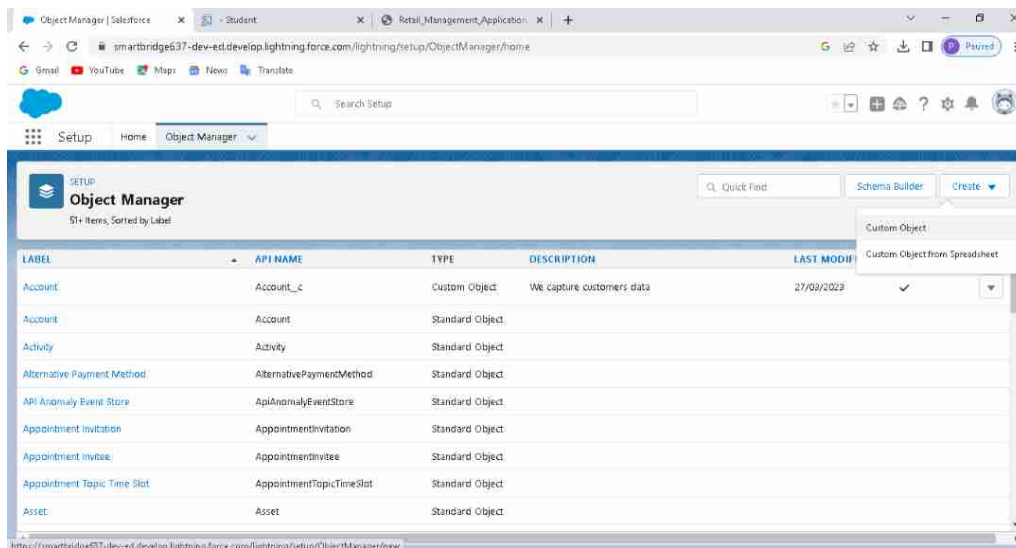
Login To Your Salesforce Account

- 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.

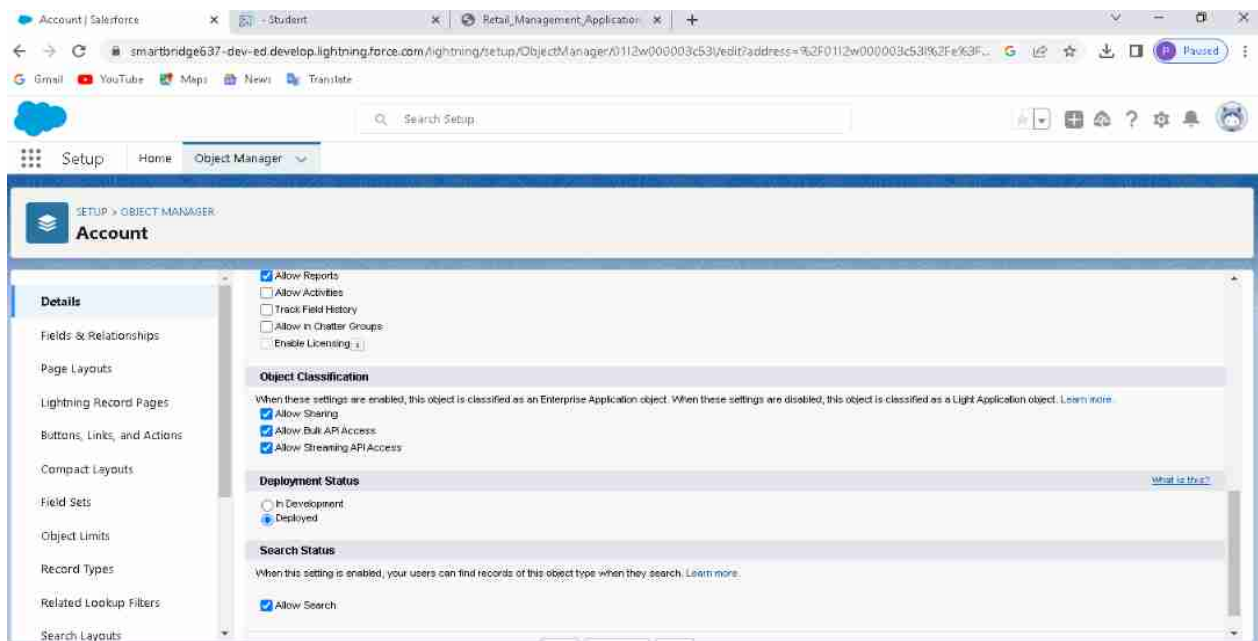


MILESTONE-2 OBJECTS

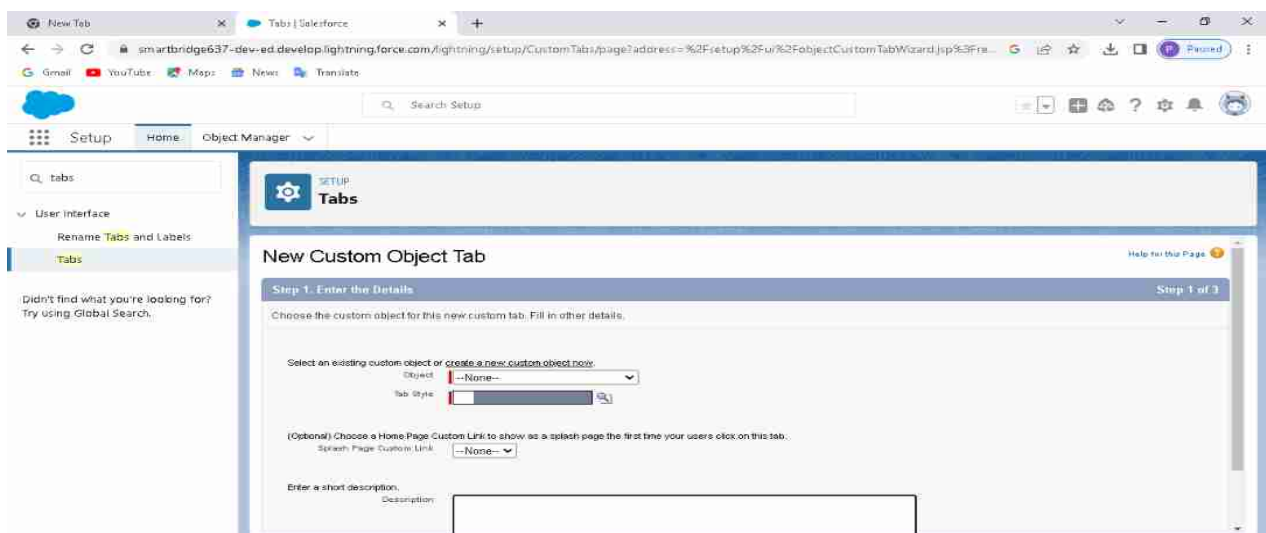
Select the object manager and Create custom object



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 'Fields & Relationships' section is active, displaying a table of 6 fields. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: Account (Checkbox), Account name (Text(80)), Accounts (Checkbox), Created By (Lookup(User)), Last Modified By (Lookup(User)), and sales_order (Master-Detail(Order)).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Account	Account_c	Checkbox		
Account name	Name	Text(80)		✓
Accounts	Accounts_c	Checkbox		
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
sales_order	sales_order_c	Master-Detail(Order)		✓

Select the data type ,checkbox has a type

The screenshot shows the 'New' field creation dialog in Salesforce Setup. The 'Data Type' dropdown is open, and 'Checkbox' is selected. The dialog provides detailed information about the selected data type, including its purpose and usage instructions.

Checkbox

Allow user to select a True (checked) or False (unchecked) value.

And label name has Account

Setup > OBJECT MANAGER
Account

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts

Step 2: Enter the details Step 2 of 4

Field Label: Account

Default Value: ☐ Checked ☒ Unchecked

Field Name: Account

Description:

Help Text:

Auto add to custom report type: ☒ Add this field to existing custom report types that contain this entity

Previous Next Cancel

Select the next option and save it.

MILESTONE-3

Activity-1 Creation of relationships between objects

Setup > OBJECT MANAGER
Account

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts

Lookups

☐ Lookup Relationship
☒ Master-Detail Relationship
☐ External Lookup Relationship

☐ Checkbox
☐ Currency
☐ Date
☐ Date/Time
☐ Email
☐ Geolocation
☐ Number

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.

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. This master object is the source of the values in the list.

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

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

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

Allows users to enter a date or pick a date from a popup calendar.

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.

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 this address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

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

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

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

Account | Salesforce

smartbridge637-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003c530/FieldsAndRelationships/new

Search Setup

Setup Home Object Manager

Account

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

New Relationship

Step 3: Enter the label and name for the lookup field

Step 3 of 6

Field Label: Account

Field Name: Account

Description:

Help Text:

Child Relationship Name: Accounts

Previous Next Cancel

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

App Manager | Salesforce

smartbridge637-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

Search Setup

Setup Home Object Manager

app manager

Apps

App Manager

Didn't find what you're looking for? Try using Global Search.

Lightning Experience App Manager

New Lightning App New Connected App

Clone Apps (Beta)

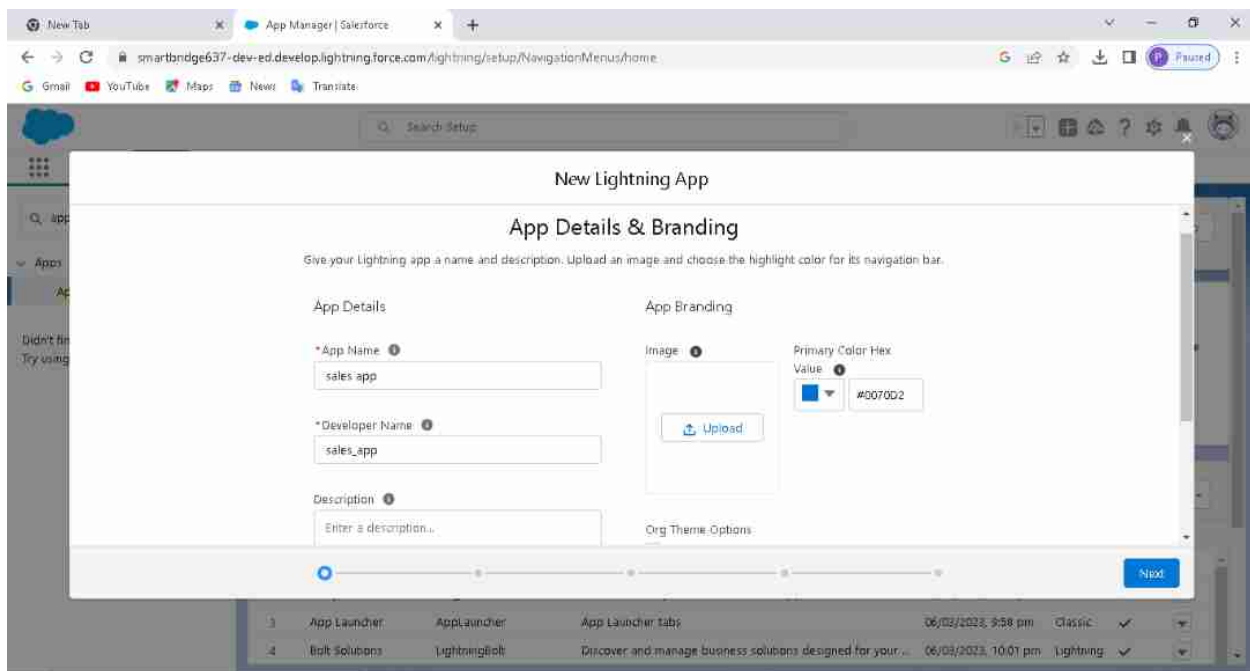
Quickly create new Lightning apps by cloning existing apps. To use the beta feature, indicate that you've read all legal requirements and agree to participate by toggling Enable App Cloning. See additional details and terms in the [Winter '23 release notes](#).

Enable App Cloning ☐ Disabled

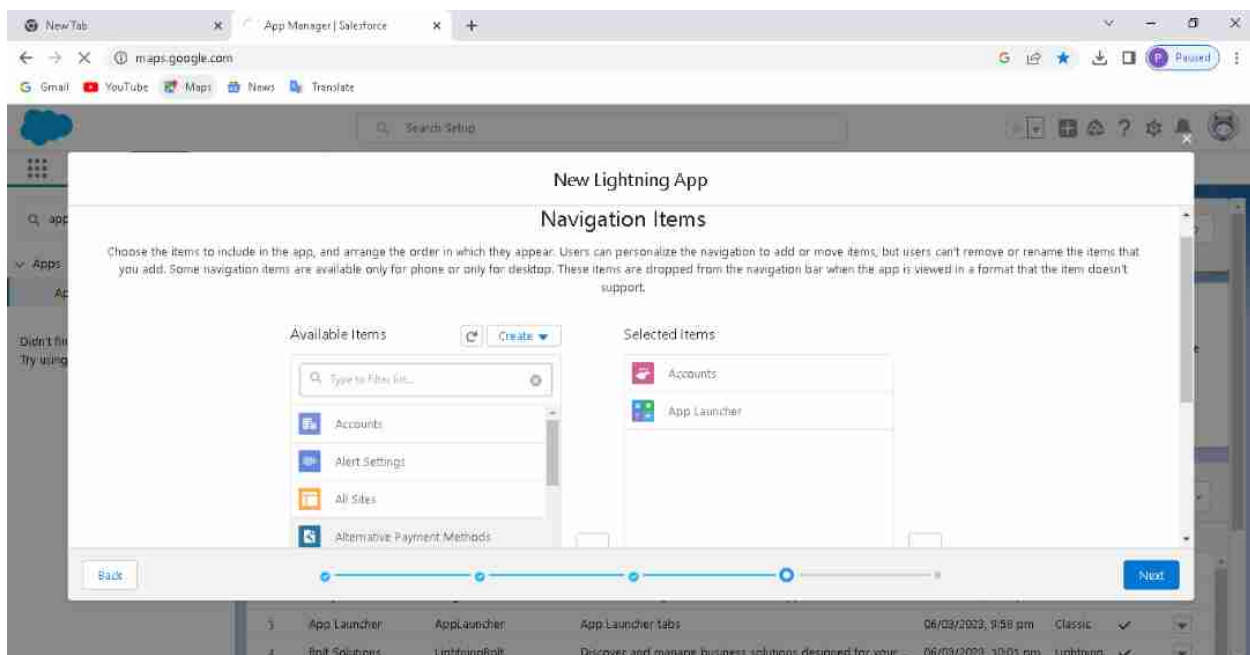
22 items • Sorted by App Name • Filtered by All app menu items • TabSet Type

App Name	Developer Name	Description	Last Modified	App...	Vi...
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



App name has sales app



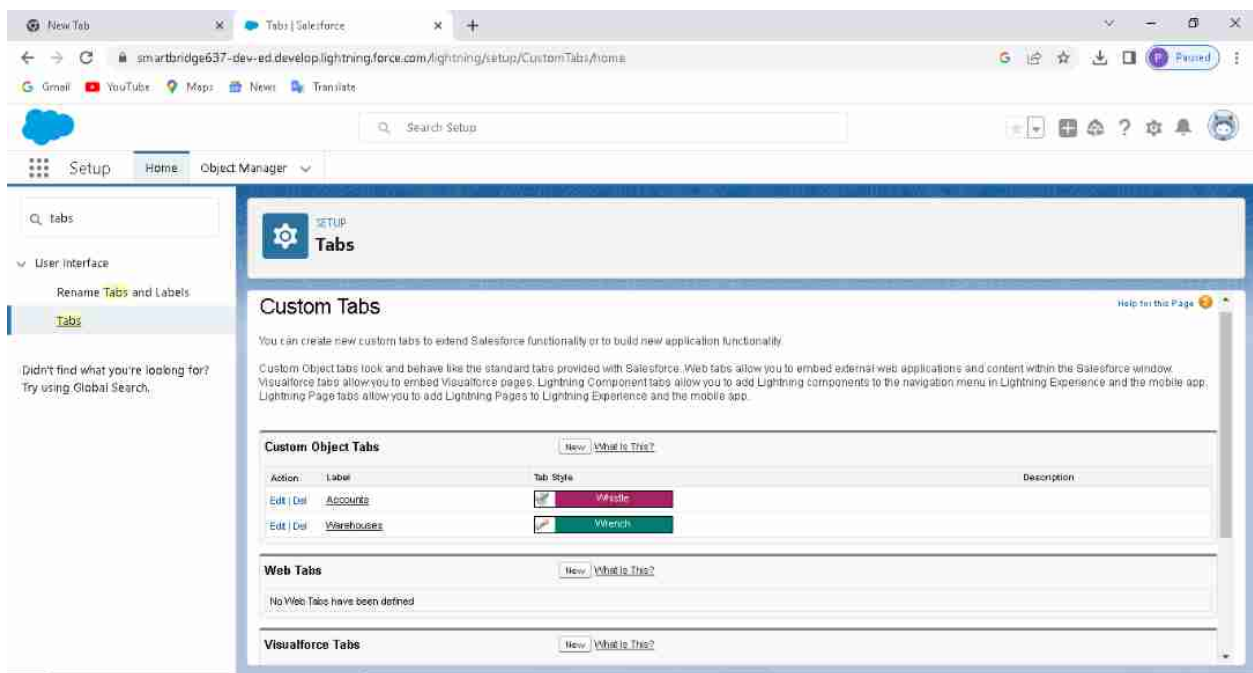
Accounts,contacts,opportunities,Leads,warehouse,dispatch/tracking,campaign to selected items

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



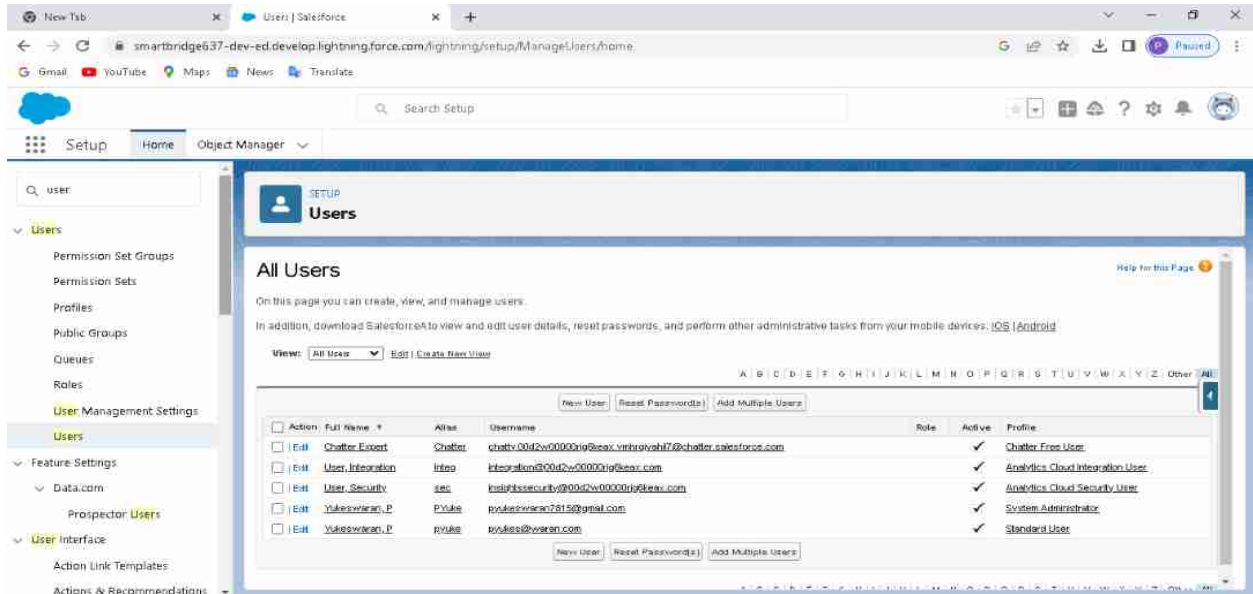
- 5) Leave all defaults as is. Click Next, Next, and Save.
- 6) In the same way create other objects such as students and parents.

MIESTONE-6 USER

ACTIVITY-1

Creation of user

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



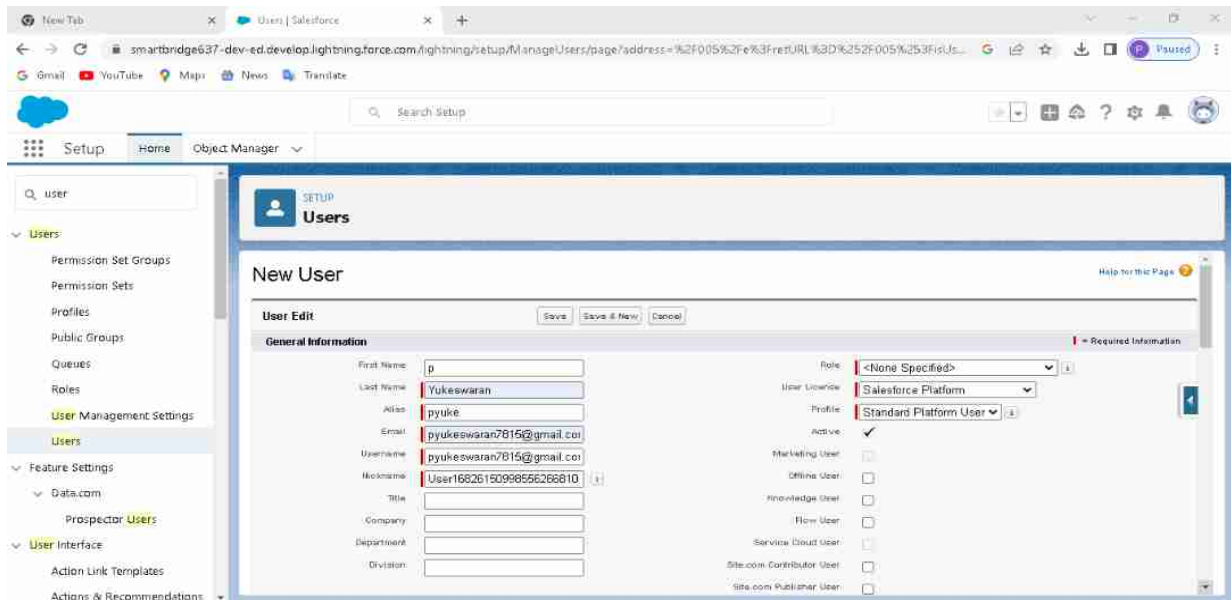
3) Give the first name and last name.

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.



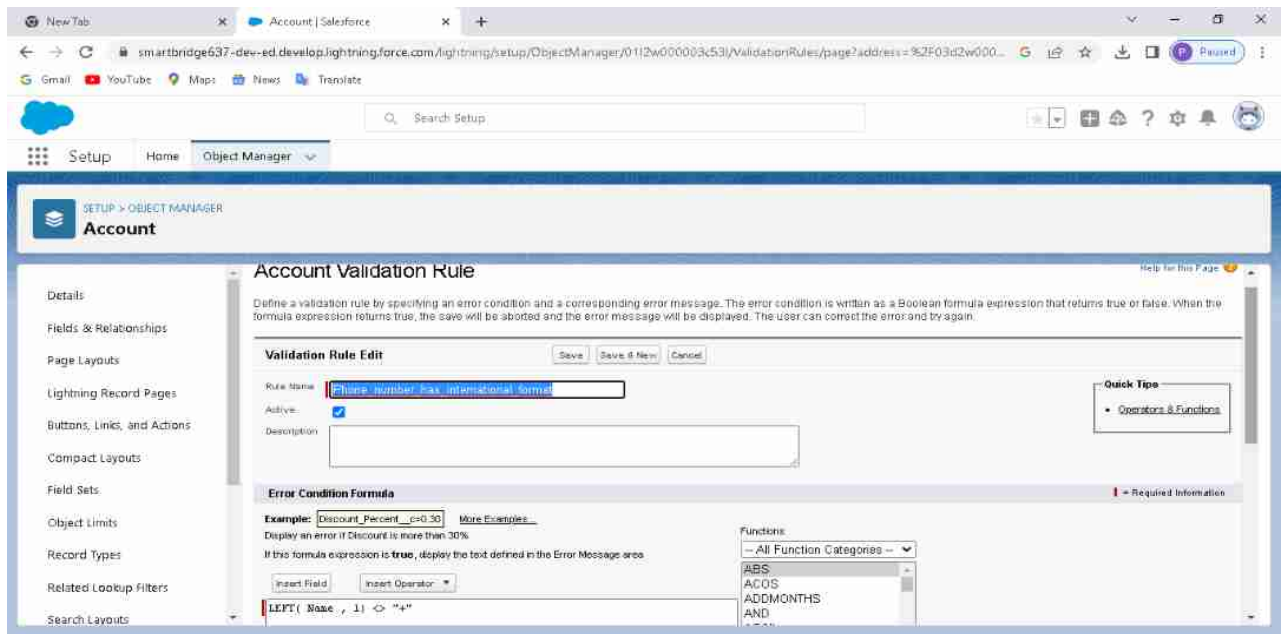
MILESTONE-7 Validation rules

ACTIVITY-1

Creation of validation rule

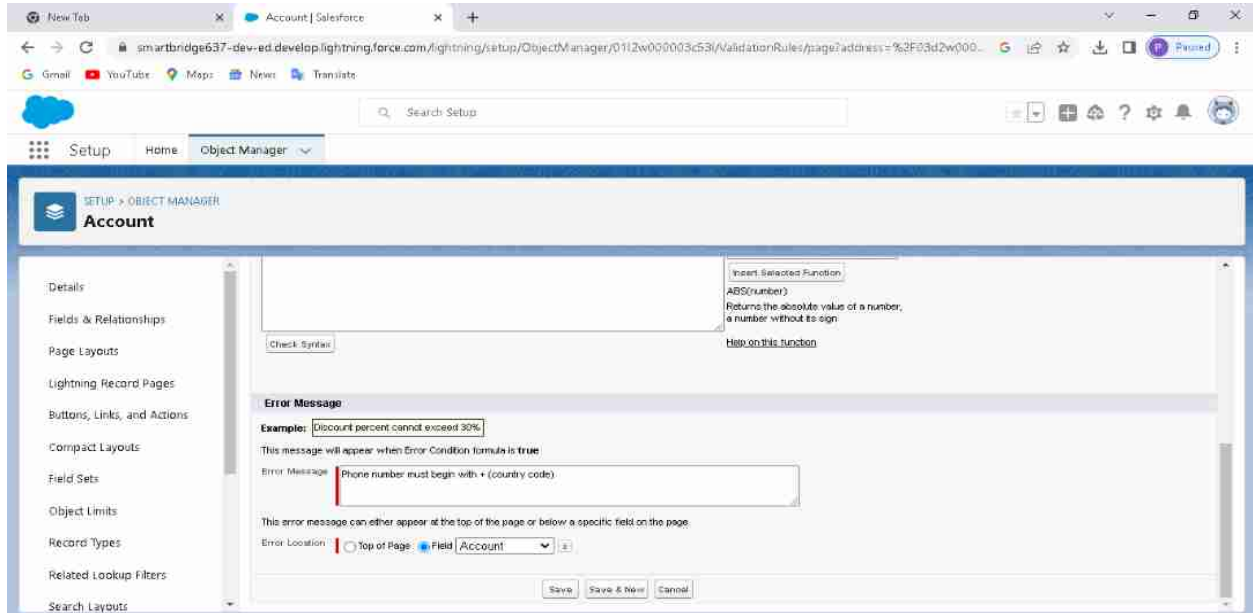
Select the Account object

Find validation rule



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

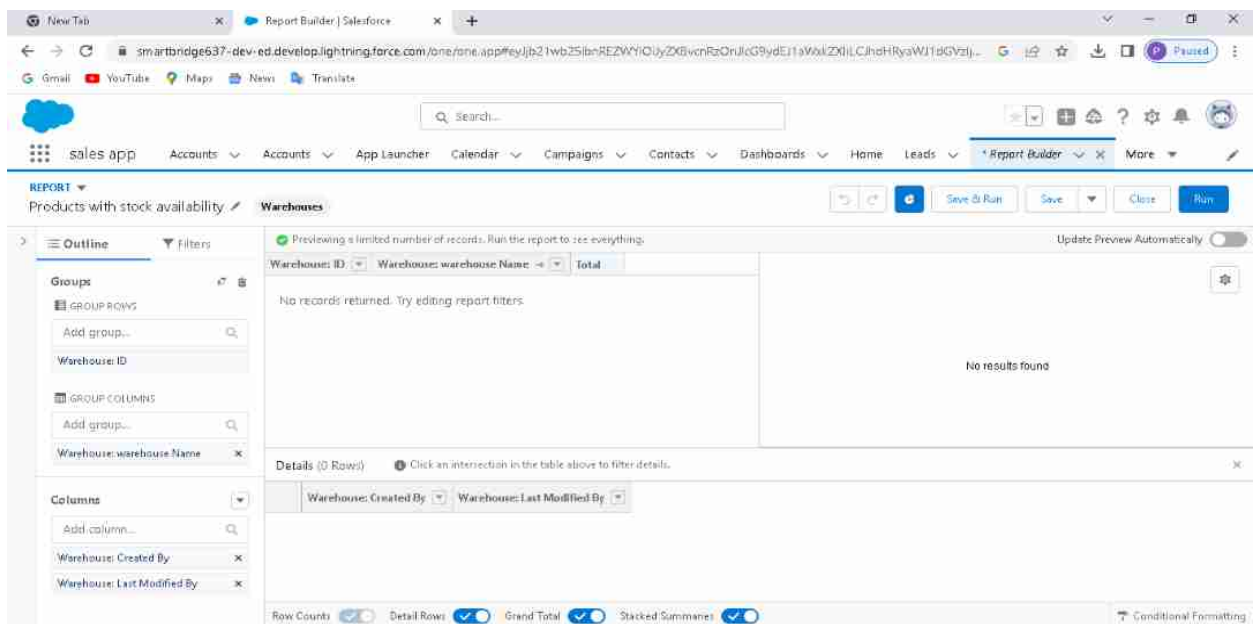
<> "+"



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

In error location select top of the field.

REPORTS :

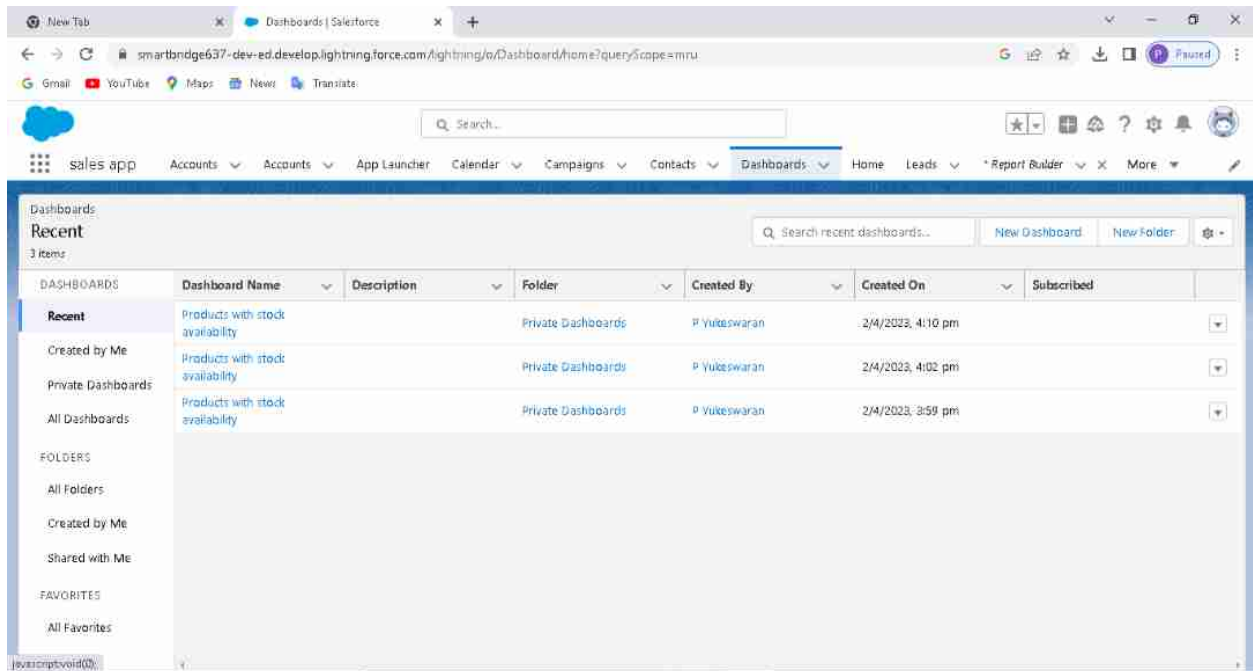


MILESTONE-8 Dashboard

Creation of Dashboards

Click on the app launcher and search for dashboards.

Select the new dashboard option.

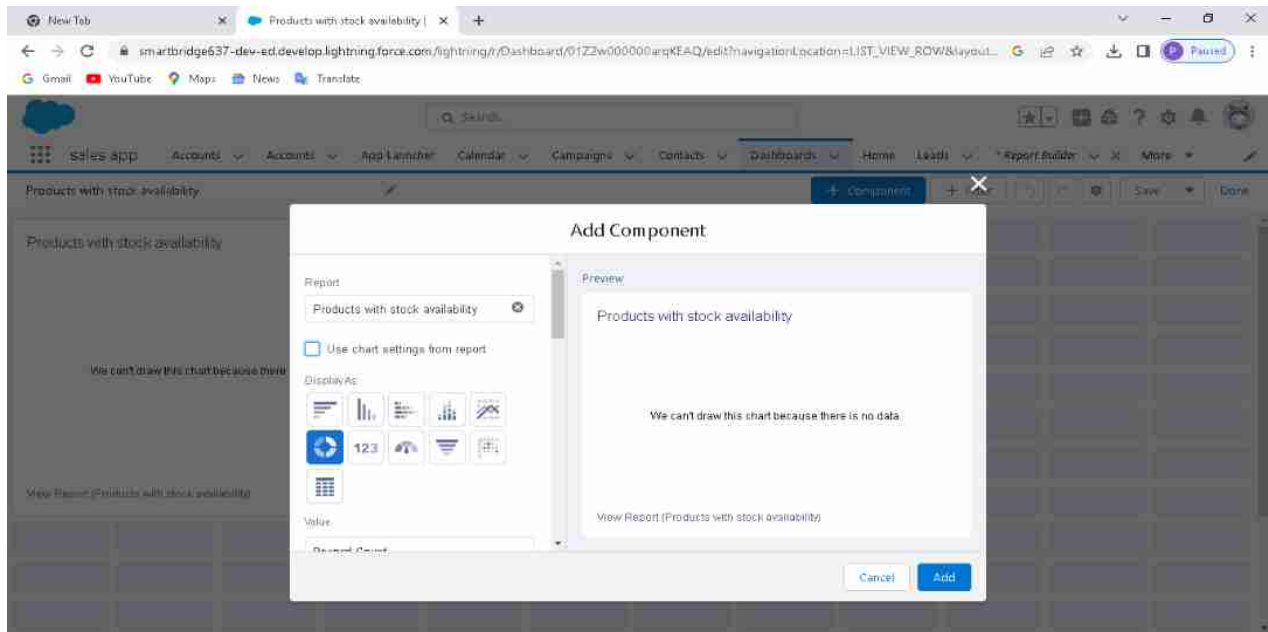


3) Name the dashboard has a products with stock availability.

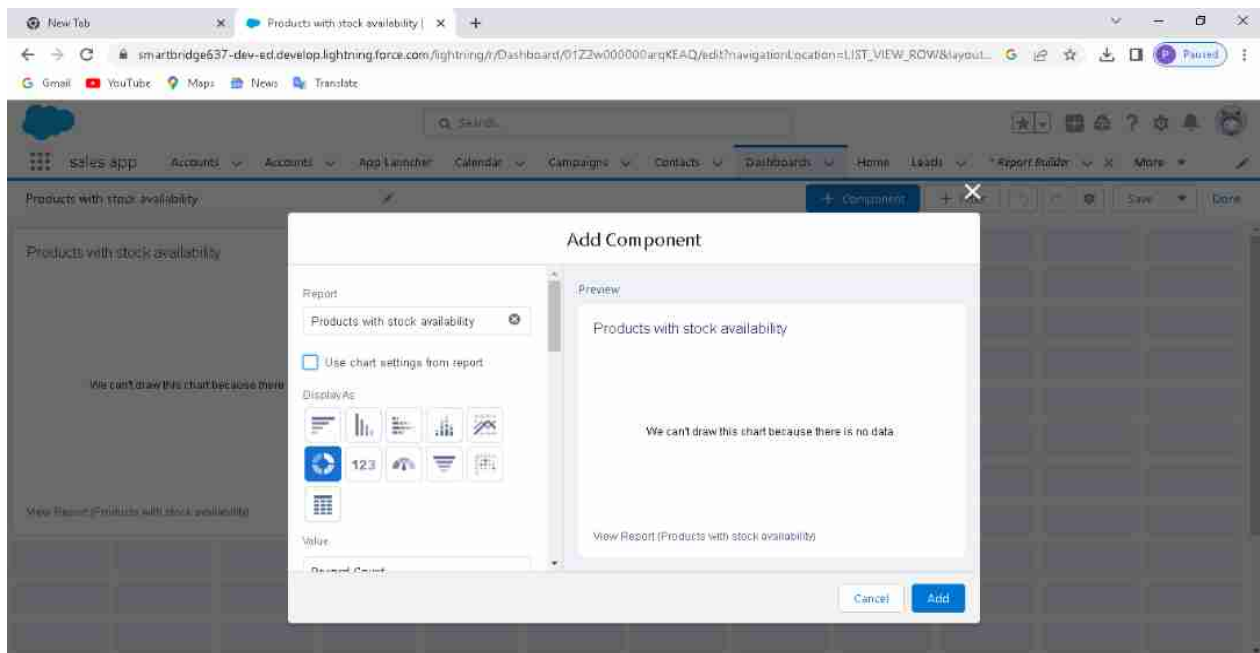
4) And select create option.

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