Retail Management Application Using Salesforce

1. Introduction

Retail management refers to the process of helping customers find products in yourstore. 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 : .

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.
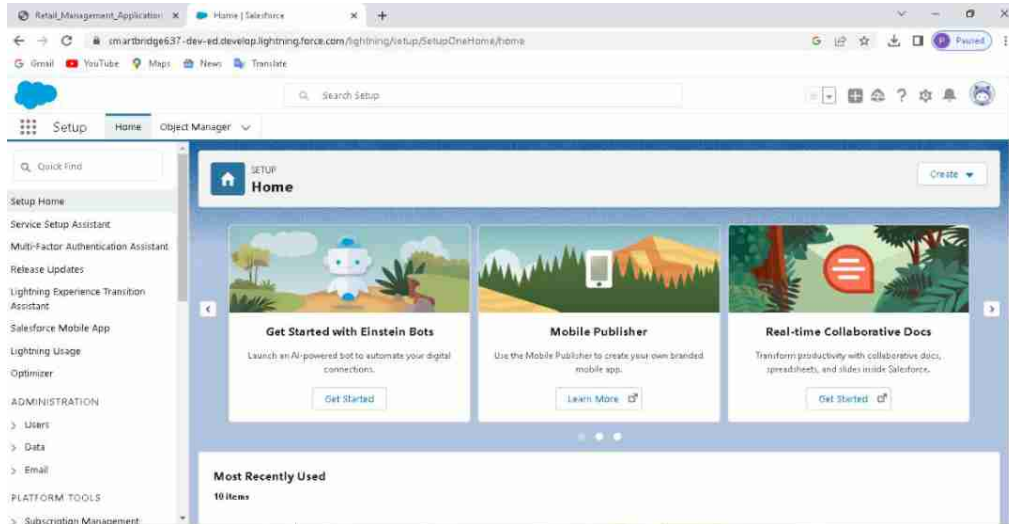
MILESTONE-2 OBJECTS

Select the object manager and Create custom object
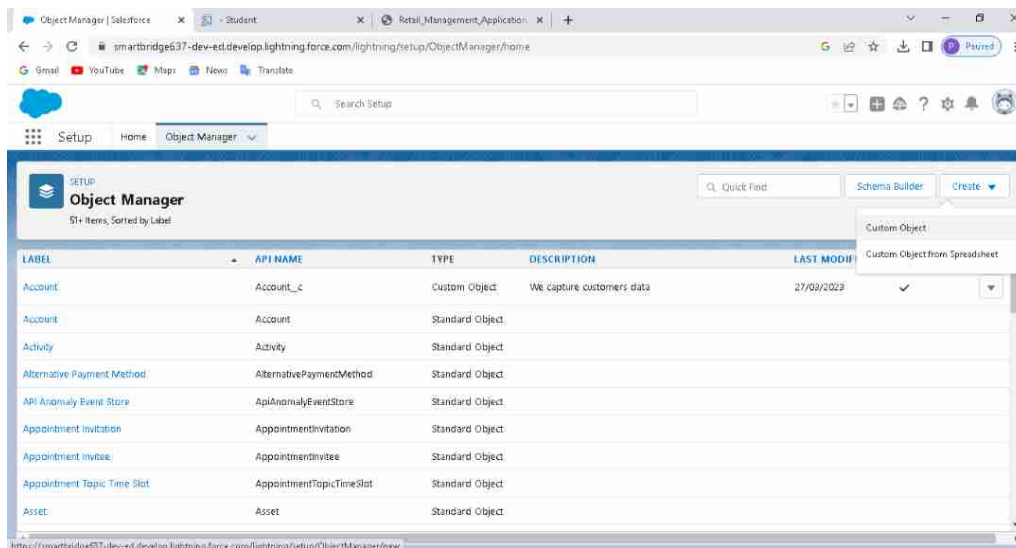
1.you have to give the object name.

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.
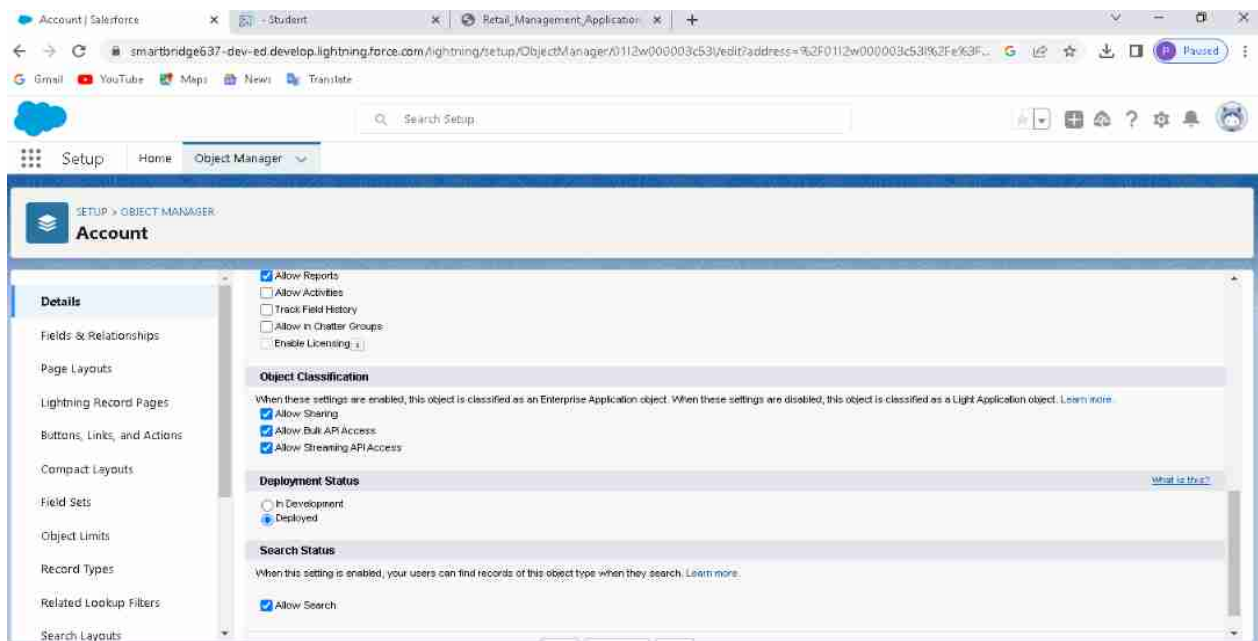
Click on next
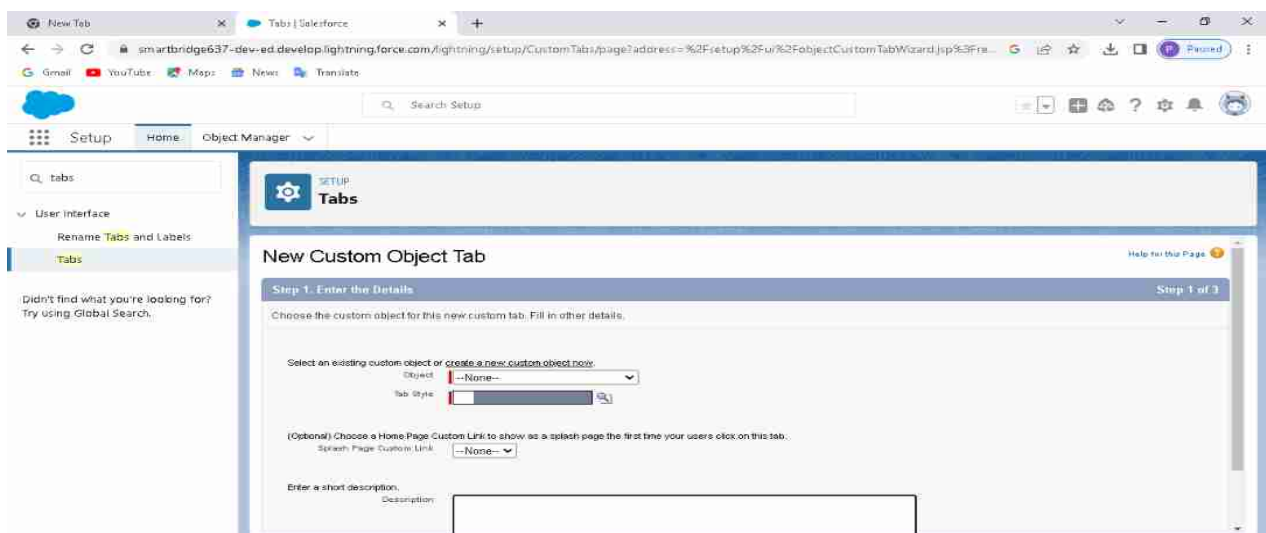
Click on next and save

ACTIVITY-2   Fields available on Account

Select the data type ,checkbox has a type

And label name has Account

Select the next option and save it.

MILESTONE-3

Activity-1   Creation of relationships between objects

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

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

Select new lightining app

App name has sales app
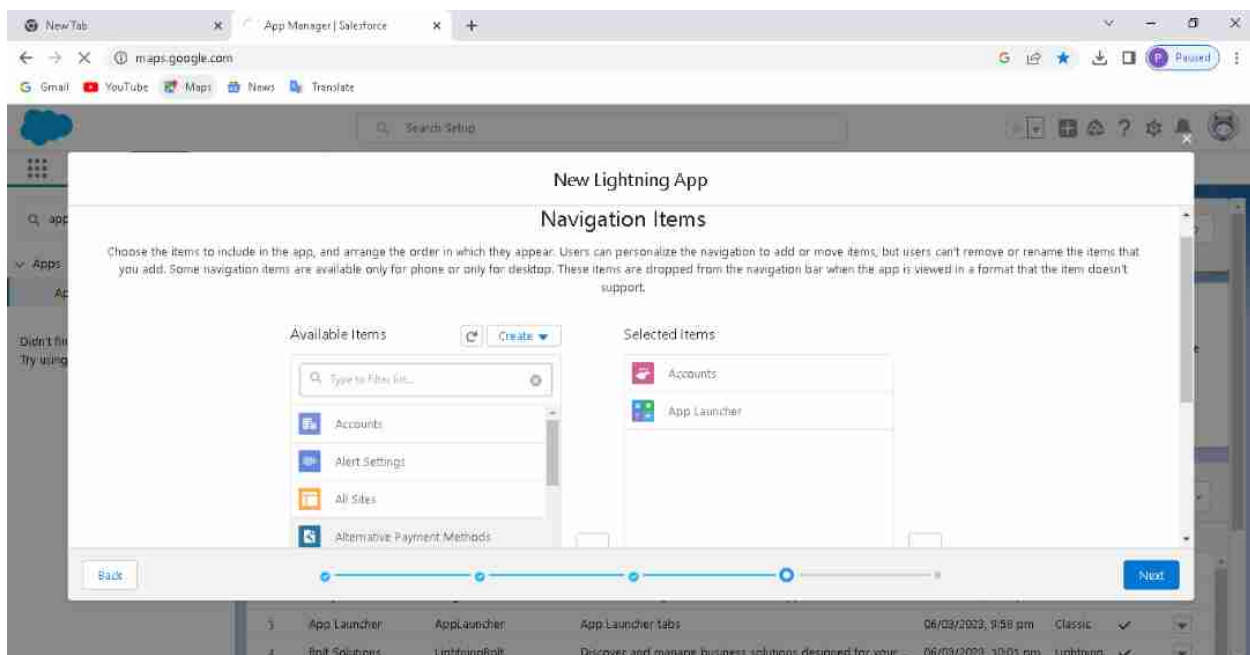
Accounts,contacts,opportunities,Leads,warehouse,dispatch/tracking,campaign to selected items

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 Warehouset.

4) For Tab Style, select any icon
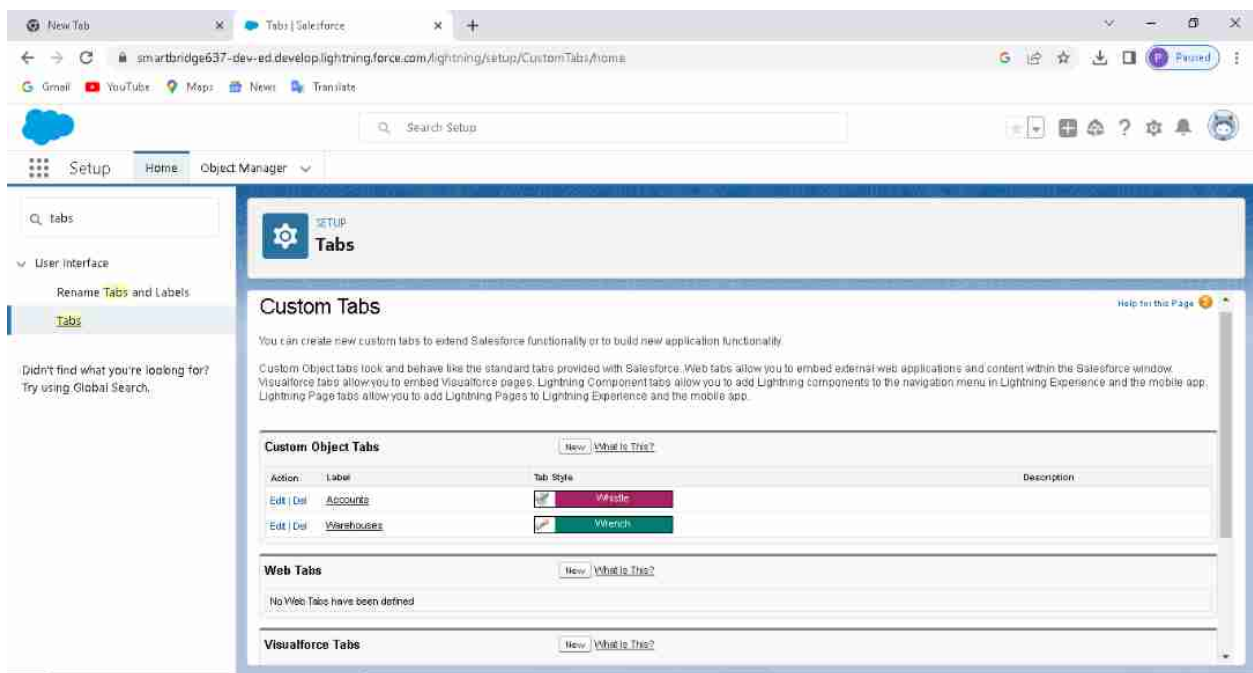
5) Leave all defaults as is. Click Next, Next, and Save.

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

MIESTONE-6 USER

ACTIVITY-1

Creation of user

1.Type user in and select it and click on new user
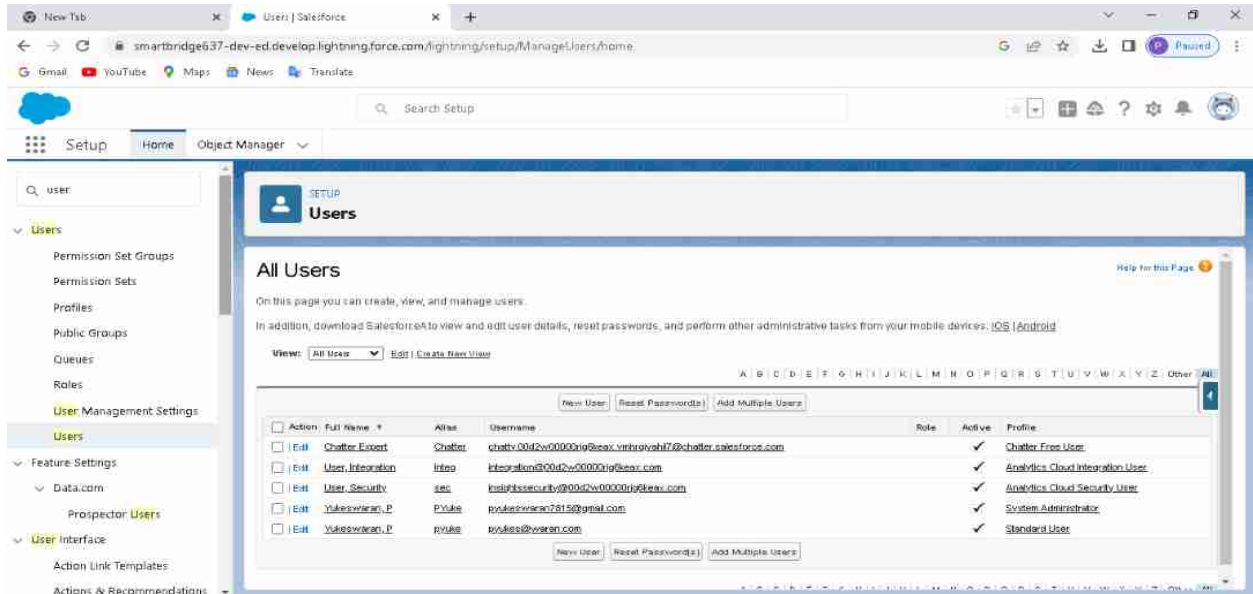
3) Give the first name and last name.

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.
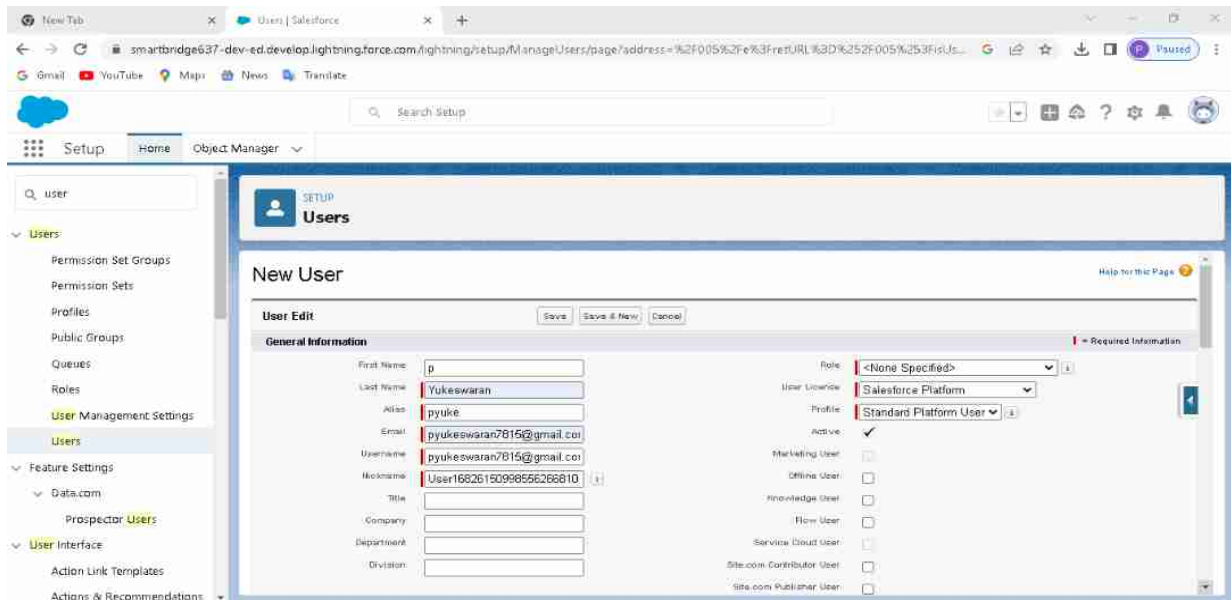
MILESTONE-7 Validation rules

ACTIVITY-1

Creation of validation rule

Select the Account object

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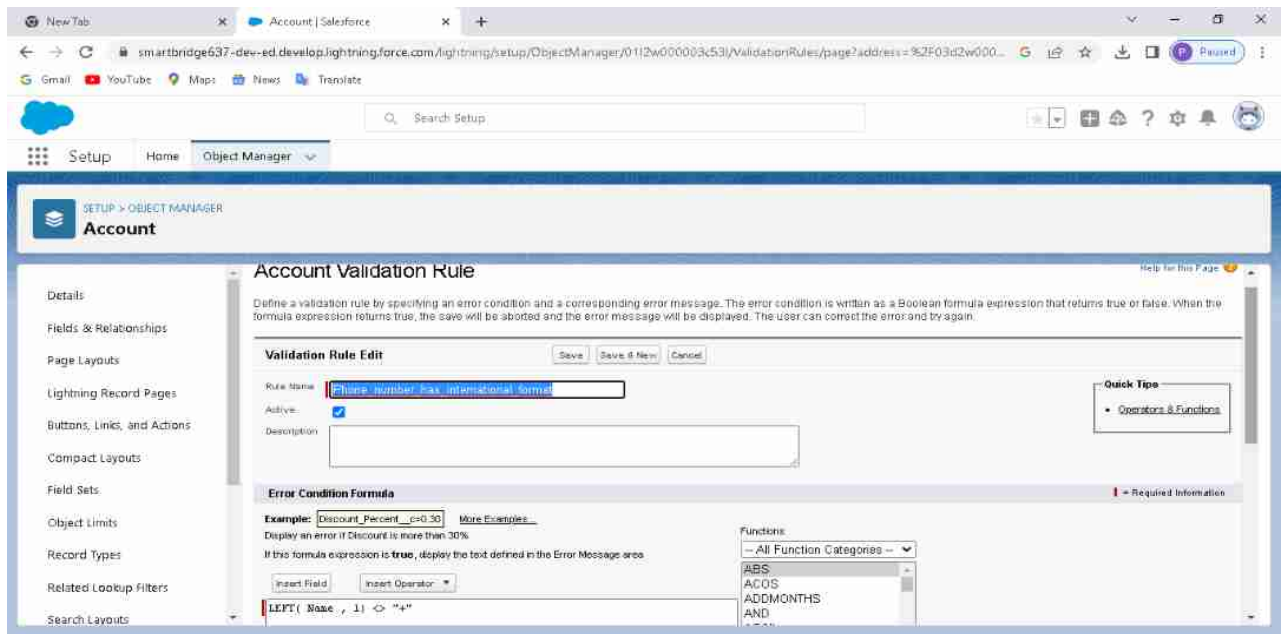
Click new, give the label name and in edit error conditional formula give the formula hasLEFT(Phone, 1)

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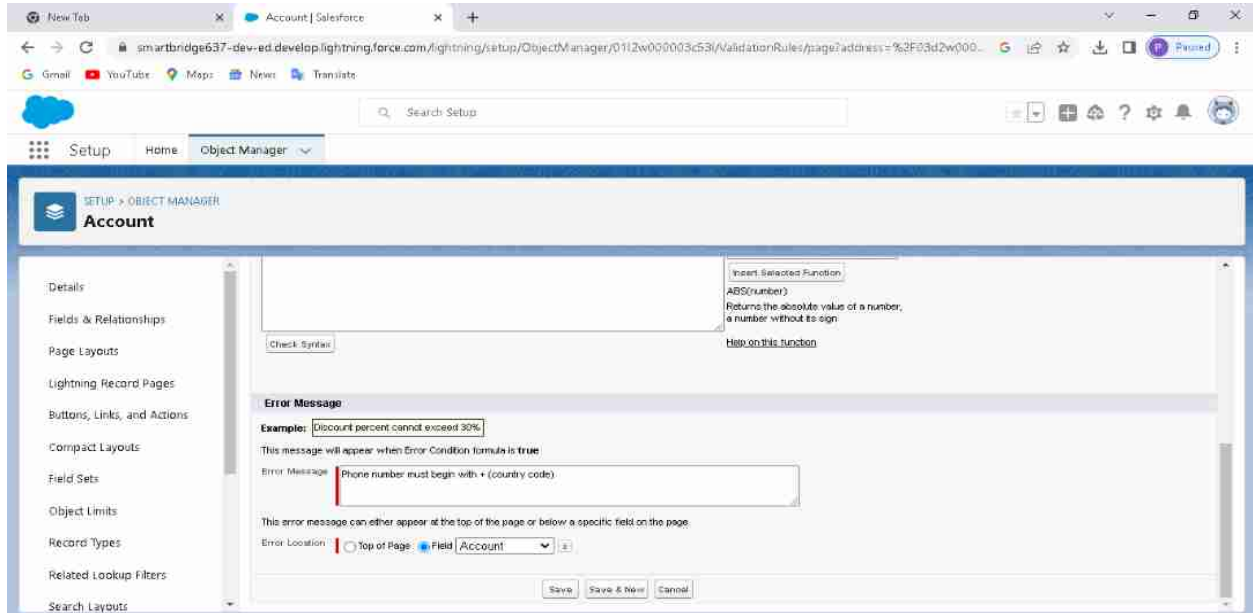
And in error message give the description has Phone number must begin with + (country code).

In error location select top of the field.

REPORTS :
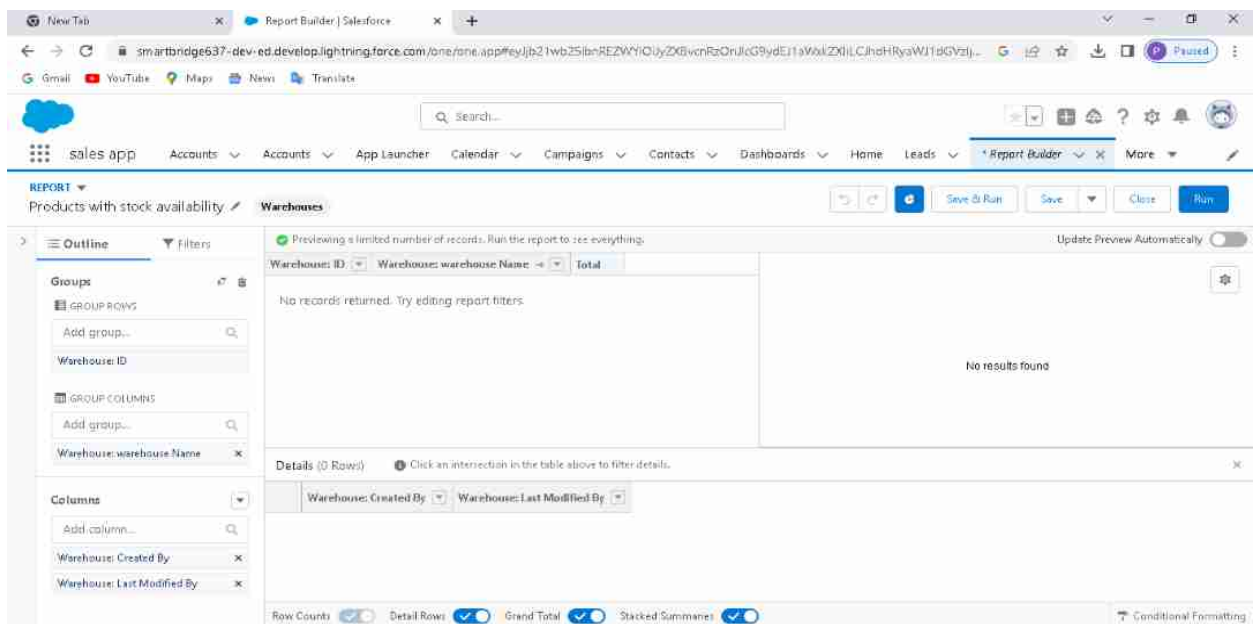
MILESTONE-8 Dashboard

Creation of Dashbords

Click on the app launcher and search for dashboards.

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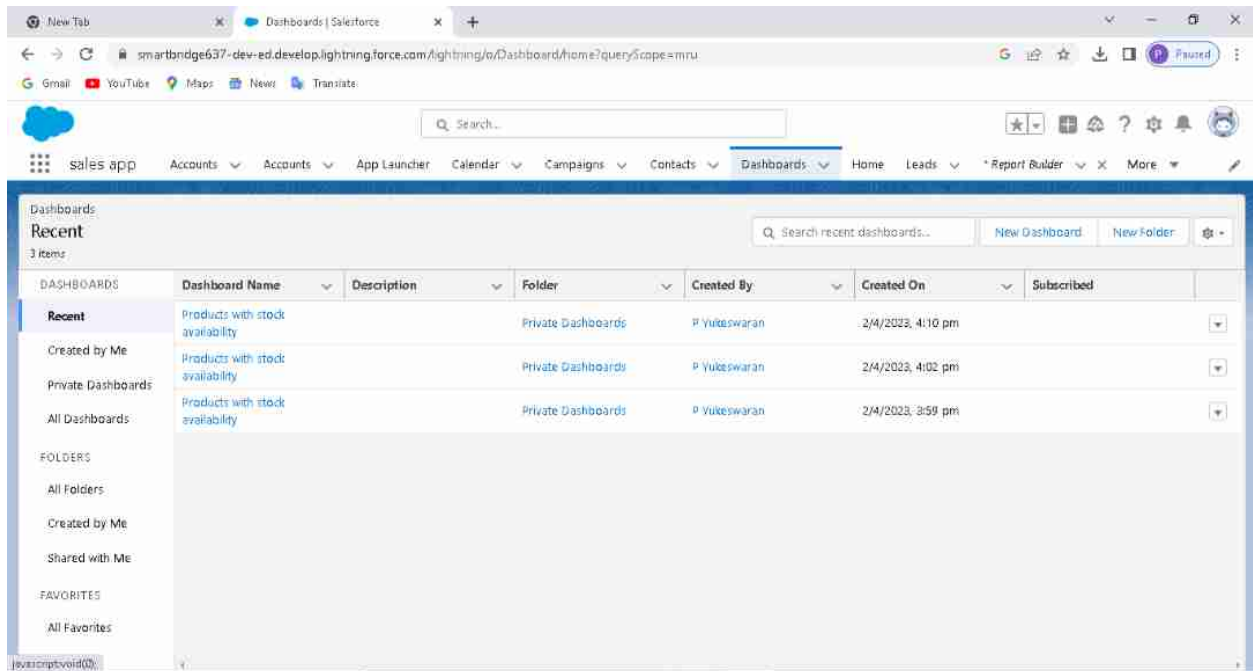
3) Name the dashboard has a products with stock availability.

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

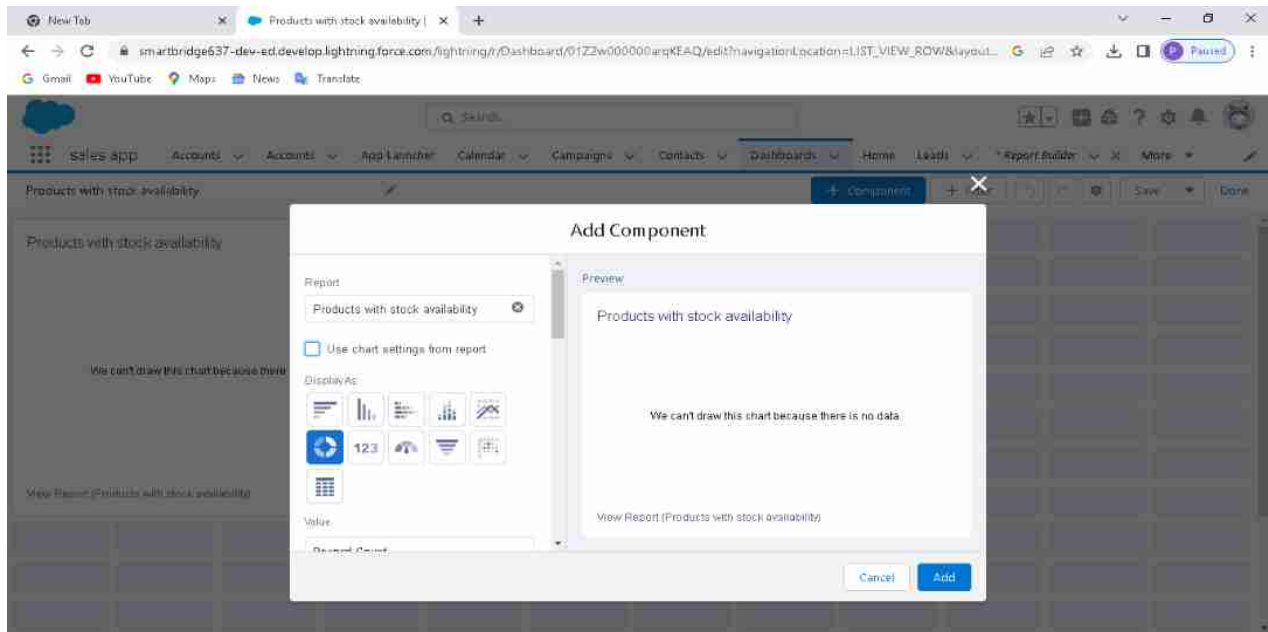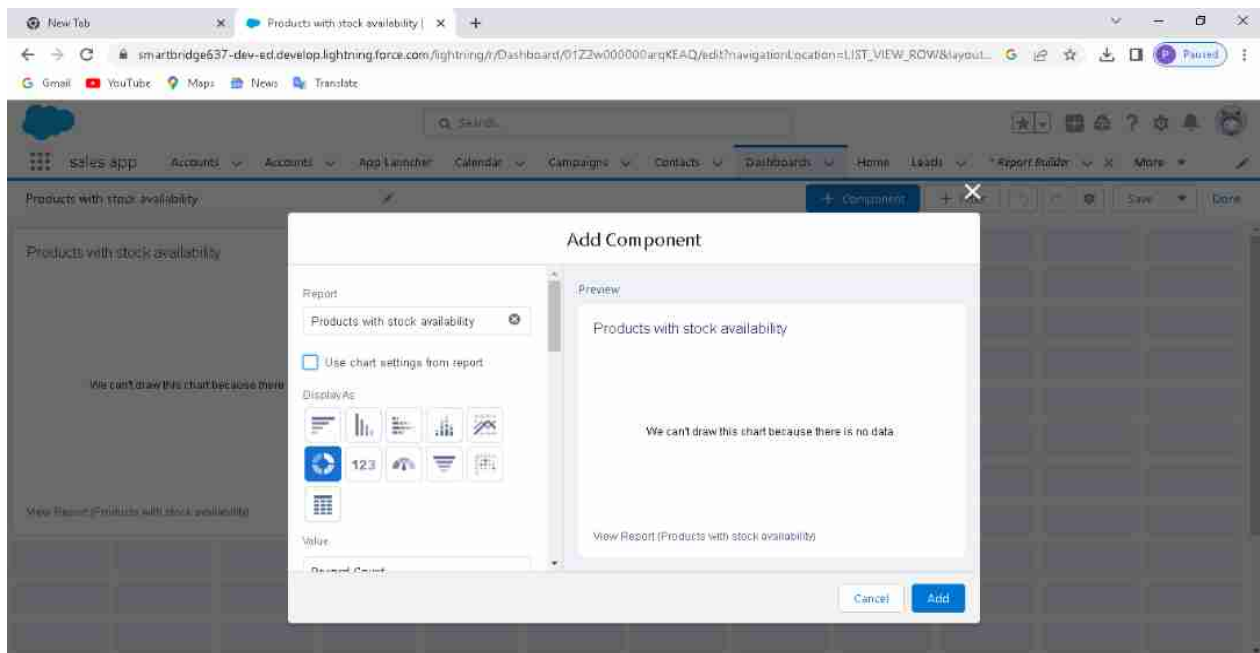   Automated Sales Processes: With Salesforce, you can automate your sales processes and make them more efficient. …

    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