GOVERNMENTOFTAMILNADU

Naan Muthalvan -Project-Based Experiential Learning

A REVIEW OF RETAIL MANAGEMENT APPLICATION USING SALEFORCE

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PG AND RESEARCH DEPARTMENT OF MATHEMATICS

M.V.MUTHIAH GOVERNMENT ARTS COLLEGE FOR WOMEN

(Affiliated To Mother Teresa Women's University, Kodaikanal)
Reaccredited with "A" Grade by NAAC
DINDIGUL-624001.

APRIL-2023

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BONAFIDE CERTIFICATE

This is to certify that this is a bonafide record of the project entitled, **"RETAIL MANAGEMENT APPLICATION USING SALEFORCE** done **by Ms.R.KANIPPRIYA(20321ER041),Ms.S.KEERTHANA(20321ER042),Ms.M.KOTHAINA YAKI(20321ER043)andMs.Z.LAILA RESHMA(20321ER045)**. This is submitted in partial fulfillment for the award of the degree of **Bachelor of Science in Mathematics in M.V.MUTHIAH GOVERNMENT ARTS COLLEGE FOR WOMEN,DINDIGUL** during the period of December 2022 to April 2023.

Project Mentor(s)   **Head of the Department**

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RETAIL MANAGEMENT APPLICATION USING SALESFORCE

1 INTRODUCTION

1.1 Over View

Retailing encompass the business activities involved in selling goods and services to customers for their personal family or household. A CRM product owner her requested to create two applications one is a sales app for saler reps to use this application and store customers data and the second application is a service app for service reps to provide support to customers in dealing cases. To generate business on top of the customers.

1.2 Purpose

Sales force can be used to manage orders from retail stores and distributors, including tracking orders, processing payments and managing inventory level. This can help field sales terms ensure that orders are fulfilled quickly and accurately and that inventory levels are maintained at optimal levels.

2. PROBLEM DEFINITION & DESIGN THINKING

2.1 Empathy Map

heard them say?
nagine them saying?

What are their wants, needs, ho[...]
and dreams? What other thoug[...]
might influence their behav[...]

It includes everything from increasing your customer pool to how products are presented and how you fulfil a customer need

Retail management refers to the process of helping customers find products in your store

its saves time and ensures the customers easily locate their desired merchandise and return home satisfied

retail is a customer facing role and you get to meet people

more results

The study of promoting and selling products and services while increasing customer satisfactionand brand loyalty

RETAIL MANAGEMENT

Planograms
COMMUNICATION PLATFORM
Orders
Range
SELs
Floorplans

viding excellent tomer services maintaing a n and anized store

developing a strong marketing strategy

offering competitive prices

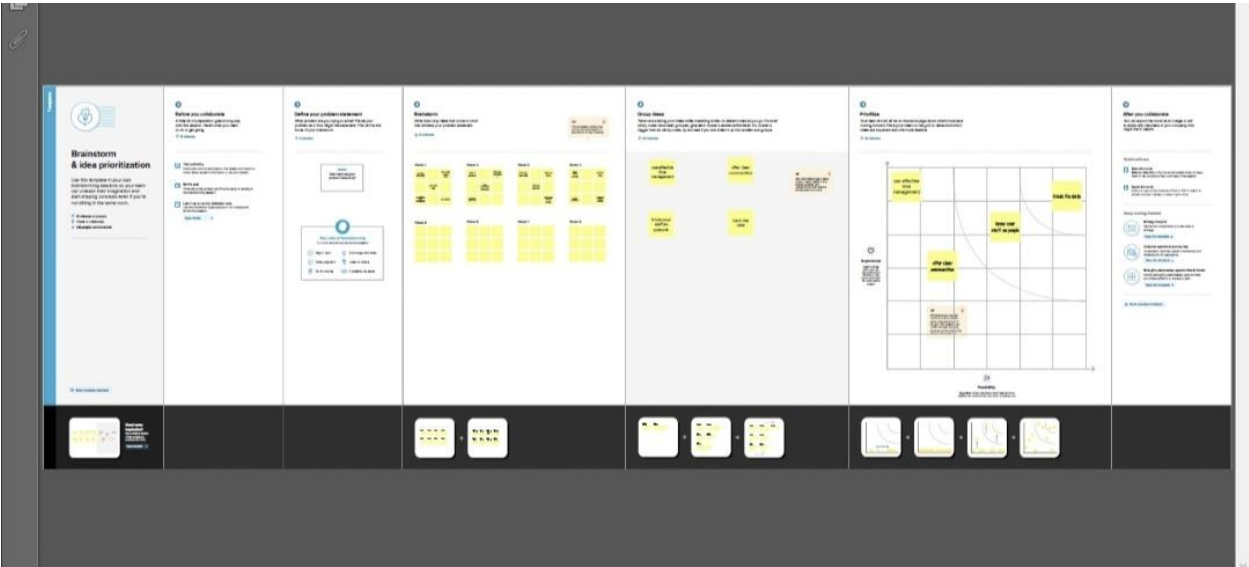optimizes internal processes such as inventory management

offline and online storefronts, warehouse oprations and human resources

its improve overall company cohesion and customer satisfaction

Fe...

What are their fears, frustrations,
anxieties? What other feelings m[...]
influence their behav[...]

have we observed?
magine them doing?

2.2 Ideation& Brainstorming map

2   RESULTS

3.1 Data Model

Object Name	Fields in the Object	
Display	**Field Label**	**Data Type**
	Display	Text
Dispatch /Tracking	**Field Label**	**Data Type**
	Dispatch / Tracking	Check box
Expected Date of Delivery	**Field Label**	**Data Type**
	Expected Date of Delivery	Check Box
Tracking Id	**Field Label**	**Data Type**
	Tracking Id	Checkbox

	Field Lable	**Data Type**
SalesOrder	Sales Order	Checkbox

3.2 Activity & Screenshot

Milestone 1 Salesforce;

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 following details :

1.First name & Last name

2.Email

3. Role : Developer

4. Company : College Name

5. County : India

6. Postal Code : pin code

7. Username : should be a combination of your name and company

This need not be an actual email id, you can give anything in the

format :

    1. **username@organization.com**

Go to the inbox of the email that you used while signing up. Click on the verify account to

activate your account. The email may take 5-10mins, as

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
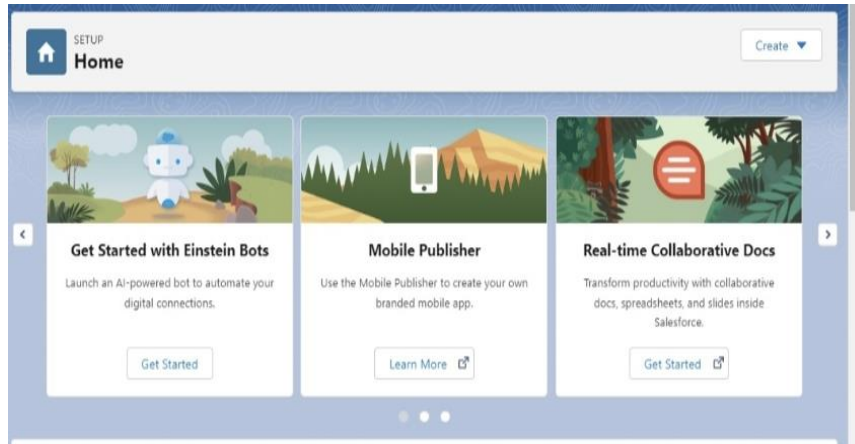
Milestone 2 Objects ;

Activity 1

Creation of object Dispatch \Tracking

1) Navigate to setup and select object manager.

2) At the top of the right side there you can find create custom object.

3) You will navigate to custom object definition edit where you have to give the object name

4) The label name has Display/tracking and Plural label has Display/trackings.

5) In enter record name label and format enter name record name has Tracking ID.

6) And the data type has text.

7) In deployment status select deployed option.

8) Ensure that you have to select at least one option in the object creation option; it is available only once when a custom object is created.

9) Then click on next you will navigate to the new custom object tab where you have to select tab style and click on next.

10) After tab selection you will be navigated to add to profiles select default on click on next.

11) Thereafter you have to select a custom app select include tab so that object will be

available in all objects and select save option.
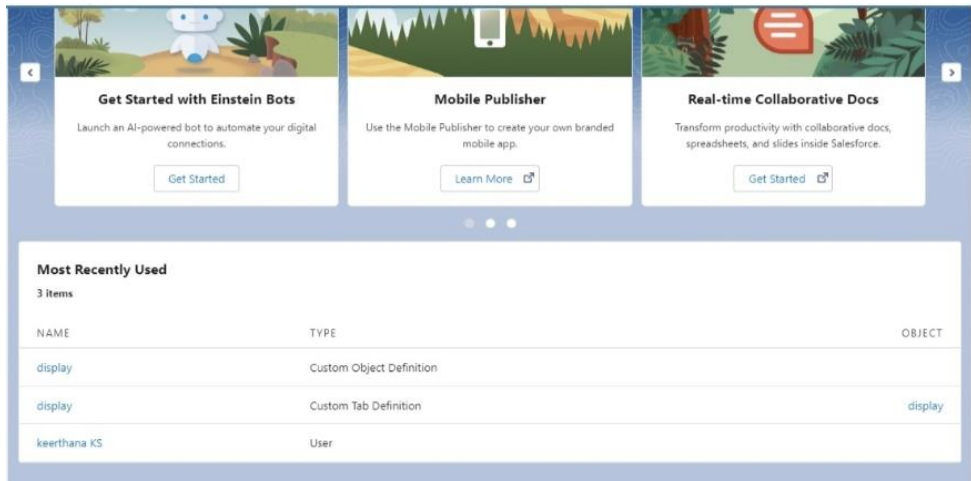
Activity 2 Fields available on Dispatch \Tracking

1) **Dispatched**
2) **Expected date of delivery**
3) **Tracking I'd**
4) **Sales order**

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**
8) **required option so that always require a value in this field in order to save.**
9) **Click next you will navigate to field level security click on visible checkbox so that it is**
10) **visible to all profiles.**
11) **Select the next option, select the page layout and save it.**

Milestone 3 Relationship between objects ;

Activity 1

Creation of relationship 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,
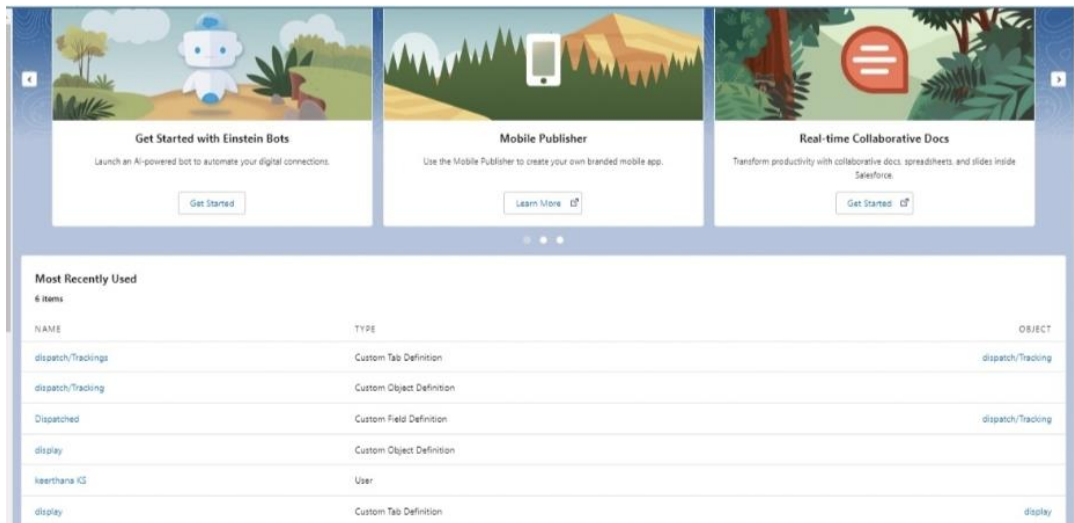
giveit has sales order and click next.7) Select visible for all profiles in field level security and select page layout in next page and
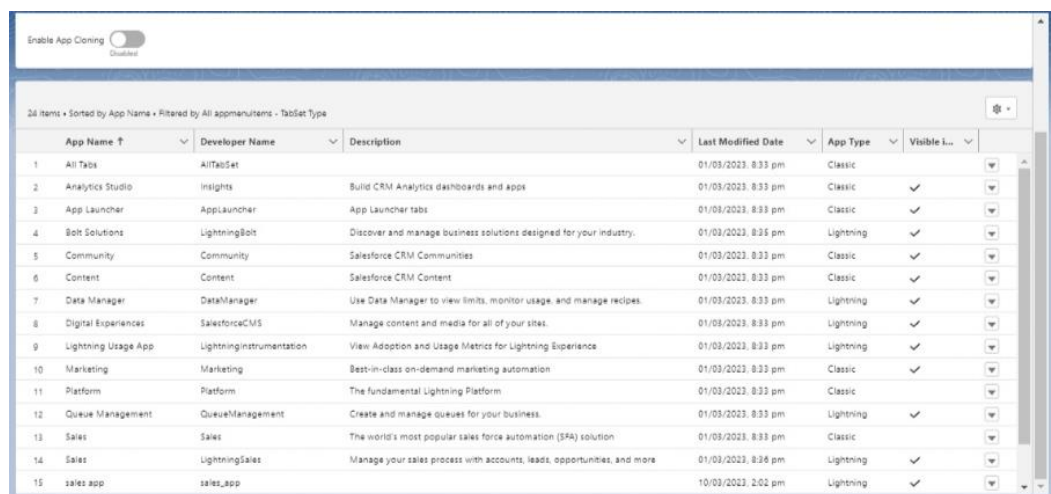
save it.
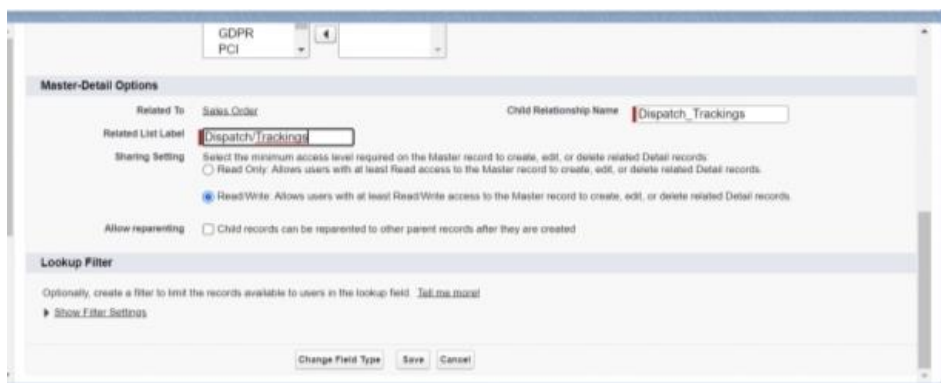
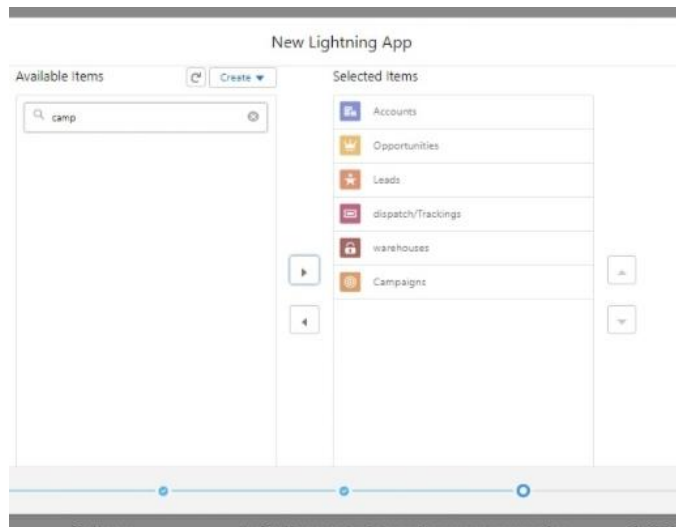## Milestone 4 Application ;

Activity 1

Creation on application

1) Navigate to setup and search for app manager
2) And select an option for a new lightning app.
3) Give the app name has sales app.
4) Upload the picture and click next.
5) Choose the app option as navigation style- standard navigation, support fromfactors-desktop & mobile and select next.
6) And move the objects from available items to selected items.
7) Accounts,contacts,opportunities,Leads,warehouse,dispatch/tracking,campaign to selected items.
8) And system admin profile to available items to selected items.

Milestone 5 Layout;

Activity 1

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 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.

Milestone 6 User ;

Activity 1

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 userimmediately.
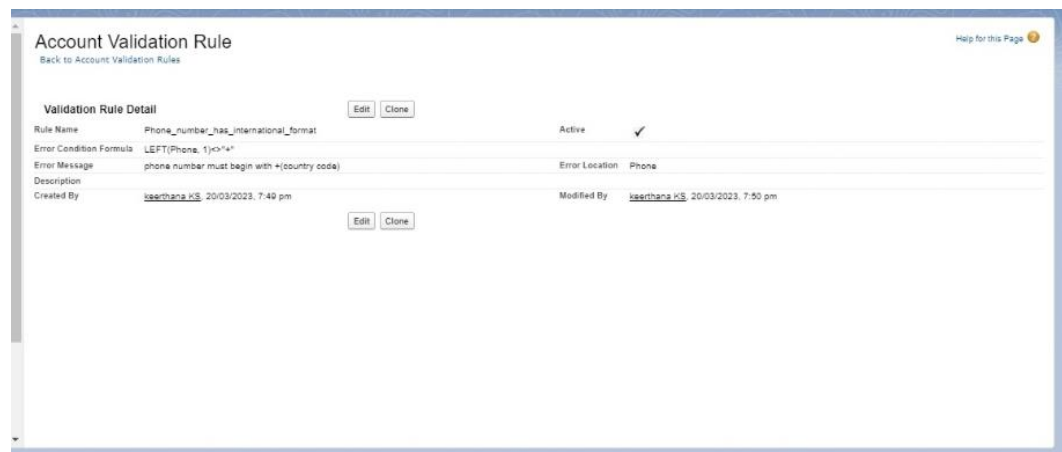
Activity 1

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

hasLEFT(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.

Activity 2

Account Validation Rule

Back to Account Validation Rules

Help for this Page

Validation Rule Detail   Edit   Clone

Rule Name	Phone_number_has_international_format		Active	✓
Error Condition Formula	LEFT(Phone, 1)<>"+"			
Error Message	phone number must begin with +(country code)		Error Location	Phone
Description				
Created By	keerthana KS, 20/03/2023, 7:49 pm		Modified By	keerthana KS, 20/03/2023, 7:50 pm

Edit   Clone

Cross object Formula

1) Select your object from object selection has Contact.

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, formula 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 Account Website

7) In the formula field enter this formula Account.Website.

8) 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.

9) Click next you will navigate to field level security click on visible checkbox so that it is

visible to all profiles.

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

Milestone 7 Reports ;

Activity 1

Creation of report

1) Click on the app launcher and search for reports.

2) And select a new report, for the record type category select other reports.

3) Select Warehouses for the report type name.

4) Select the start button to create a new report.

5) At the left side of the report you can find an outline pane.

6) In the group rows select Product name.

7) And in columns warehouse:warehouse name and stock available.

8) Now navigate to the filter pane available next to the outline pane and ensure in the show me section all my warehouses is selected.

9)And in the warehouse created date select all time.

10)And give the label name products with stock availability.

11)Click on save and run for saving the report.

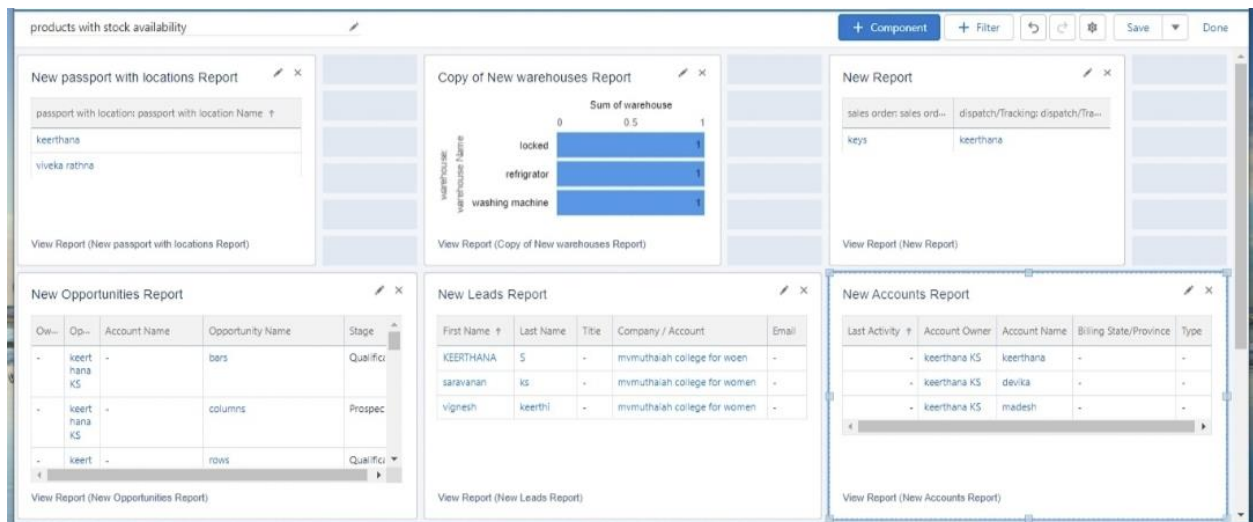| Report Name	∨	Description	∨	Folder	∨	Created By	∨	Created On	∨	Subscribed	
New warehouses Report				Private Reports		keerthana KS		29/3/2023, 4:50 pm			▼
Copy of New warehouses Report				Private Reports		keerthana KS		29/3/2023, 1:46 pm			▼
New Report				Private Reports		keerthana KS		29/3/2023, 5:13 pm			▼
New Opportunities Report				Private Reports		keerthana KS		29/3/2023, 5:09 pm			▼
New Leads Report				Private Reports		keerthana KS		29/3/2023, 5:11 pm			▼
New Accounts Report				Private Reports		keerthana KS		29/3/2023, 5:04 pm			▼

Milestone 8 ;

Activity

Creation of dashboard

1) Click on the app launcher and search for dashboards.

2) 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.

7) Ensure that value is record count and sliced by product name.

8) Leave the default values.

9) Click on add.

10) And save the dashboard.

4 trailhead profile public URL

Team lead : https://trailblazer.me/id/kothai43

Team member 1 : https://trailblazer.me/id/keerthanas4

Team member 2 : https://trailblazer.me/id/ajilai9300

Team member 3: https://trailblazer.me/id/kanir7

5 Advantages and Disadvantages

1Customer Engagement: Salesforce provides a unified platform for managing customer interactions, which enables retailers to deliver personalized shopping experiences. With features like Einstein AI and Live Agent, retailers can provide real-time assistance and support to customers, resulting in increased   customer loyalty .

1   Data Management: Salesforce provides a centralized repository for managing customer, product, and sales data. Retailers can easily access and analyze this data to make informed business decisions, such as optimizing pricing and product placement.

2   3Inventory Management: Salesforce integrates with leading e-commerce platforms and point-of-sale (POS) systems, making it easy for retailers to manage their inventory and ensure that products are always in stock. With real-time inventory updates, retailers can make better decisions about restocking and order fulfillment.

4Omnichannel Experience: Salesforce provides a seamless omnichannel experience for customers, allowing them to shop on any device and in any location. Retailers can use Salesforce to track customer behavior across multiple channels and deliver consistent, personalized experiences.

5Collaboration: Salesforce makes it easy for teams across different departments to collaborate and share information. For example, sales and marketing teams can work together to develop and execute targeted campaigns, while customer service teams can access customer data to resolve issues more efficiently.

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 Application

Our platform is built on Hyperforce, our next-generation infrastructure, which allows Salesforce applications to scale rapidly and enables you to choose where in the world your Salesforce apps run. On top of Hyperforce is our latest innovation, **Data Cloud**, which helps you make the most of all your data.

Some of the commonly used application software include:

- Word Processing Software.

- Graphics Software.

- Spreadsheet Software.

- Presentation Software.

- Web Browsers

7 Conclusion

With Salesforce Customer 360 for retail, your business can thrive in a digital-first world. Our integrated CRM platform for retail will help you unite your teams, create compelling commerce and marketing experiences, and deliver consistent service at every moment.

Unite teams around a 360-degree view of every customer at every touchpoint of their journey. Deliver the personalised experiences your customers expect with an intelligent solution.Unlock collaboration across teams on a single, integrated platform. Transform your retail business fast and improve relationships with suppliers, shoppers, and employees.Deliver seamless buying and service experiences across all channels by engaging with customers in the right place, at the right time.

5   Future scope

As one of the most exciting Cloud platforms around, the Salesforce suite of applications is beginning to find widespread applicability in a rapidly increasing number of industry domains, and SFDC has witnessed tremendous growth in recent years.

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