RETAIL MANAGEMENT APPLICATION USING SALEFORCE

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RETAIL MANAGEMENT APPLICATION USING SALESFORCE

1 INTRODUCTION

Salesforce is a cloud-based software company that provides its customers with a platform to develop their own applications without following the tough steps that they used to follow in the legacy system. The software or application once created can be uploaded onto the cloud allowing the end-users to view them.

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

Thi...

What are their wants, needs, hop...
and dreams? What other thoug...
might influence their behav...

heard them say?
nagine them saying?

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

developin g a strong marketing strategy

optimizes internal processes such as inventory management
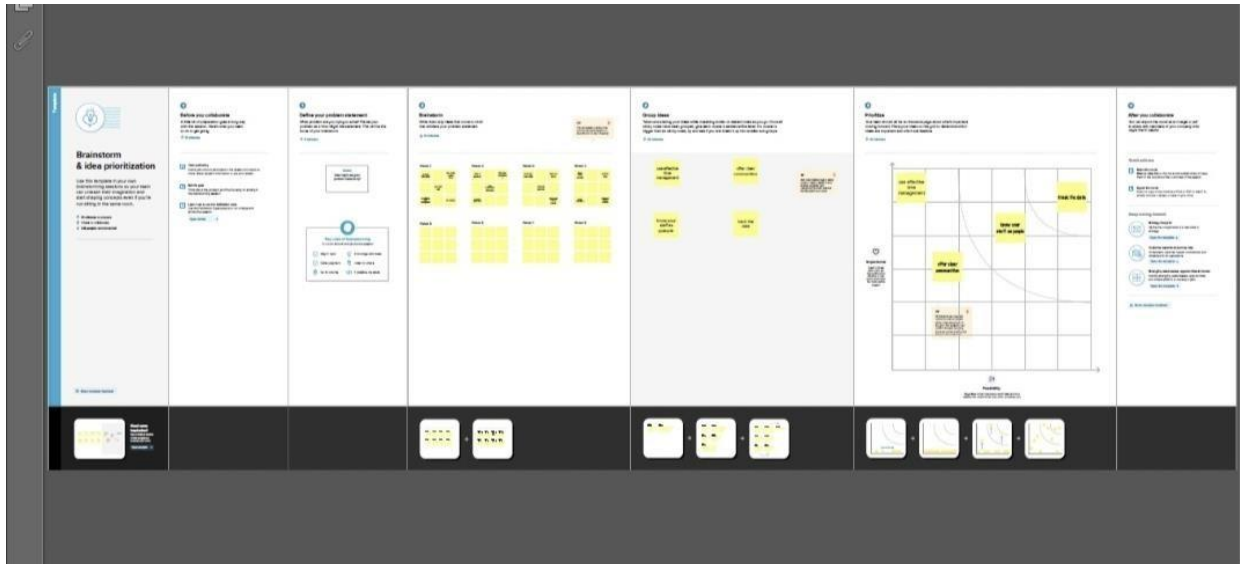
offering competitive prices

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

3

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

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 :
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
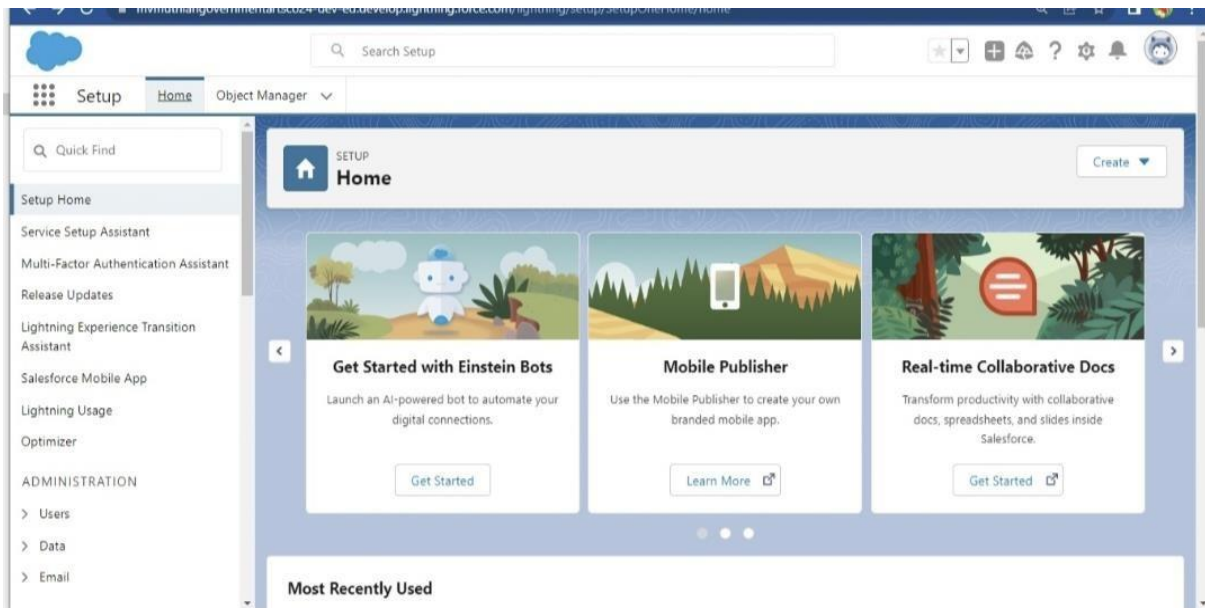
Milestone 2 Objects

 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.**
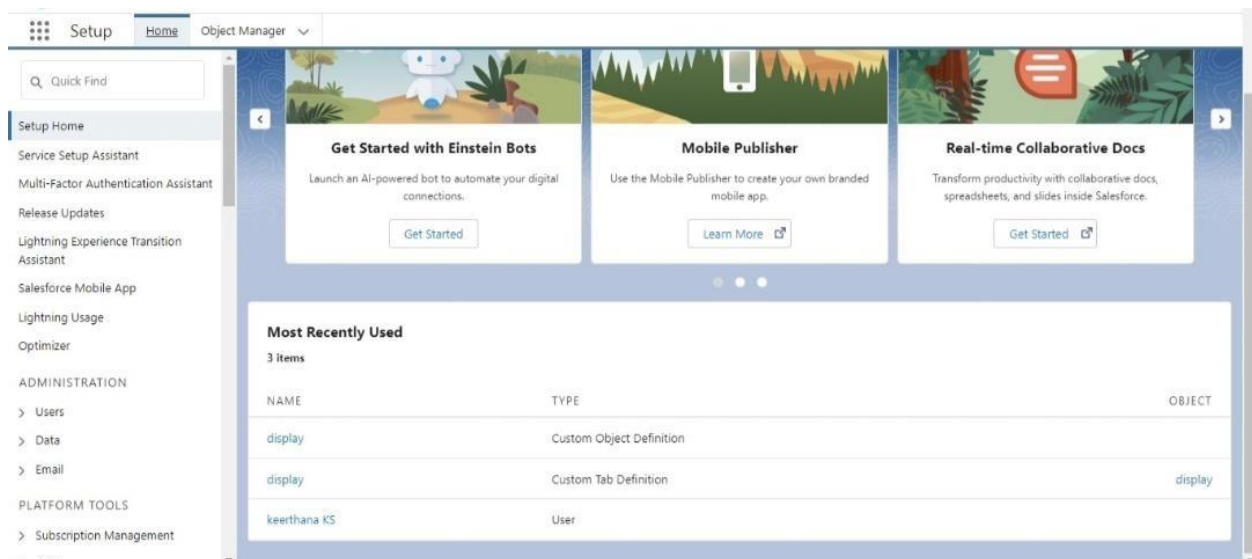
**Activity 2 Fields available on Dispatch \Tracking**

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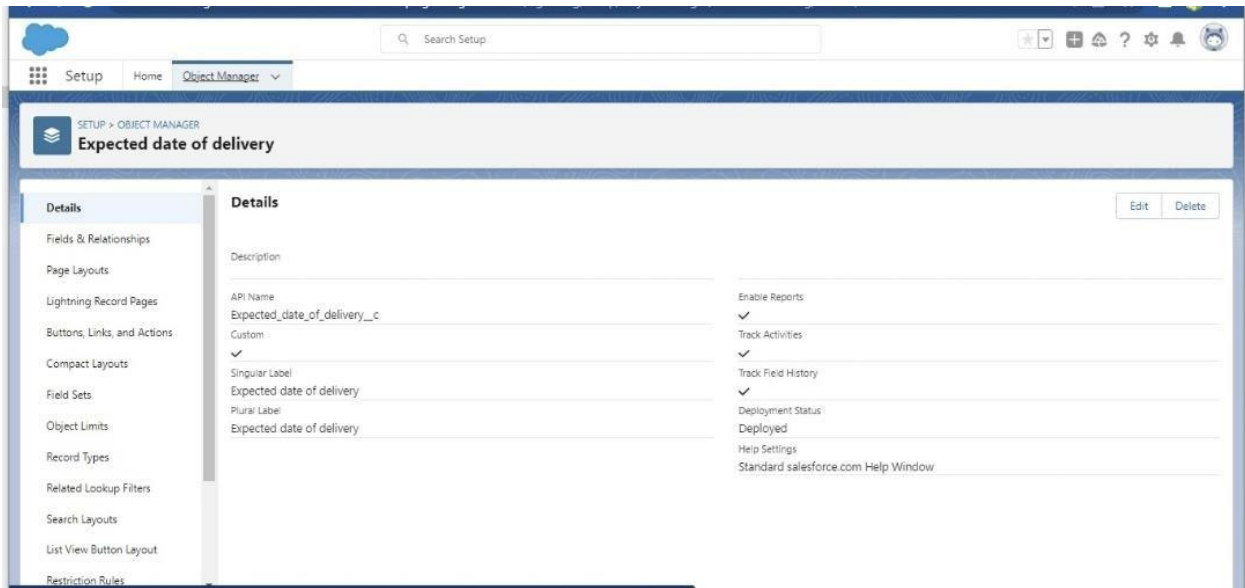4) **Sales order**

Creation of fields on Dispatch \Tracking
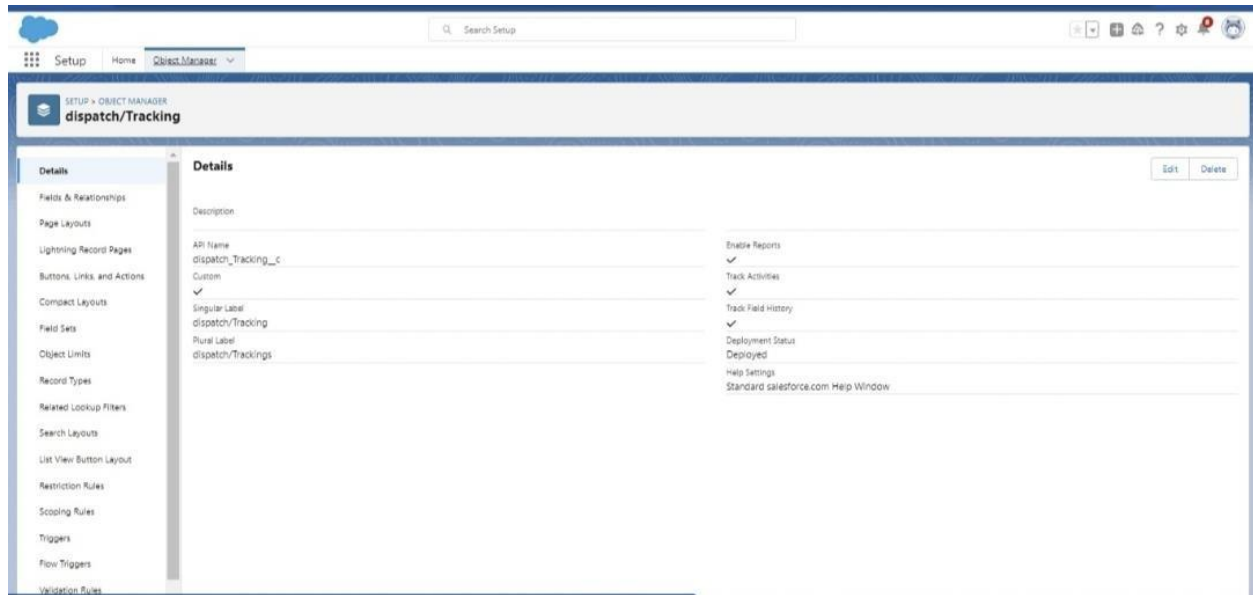
1) **Select your object from object selection has**

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.
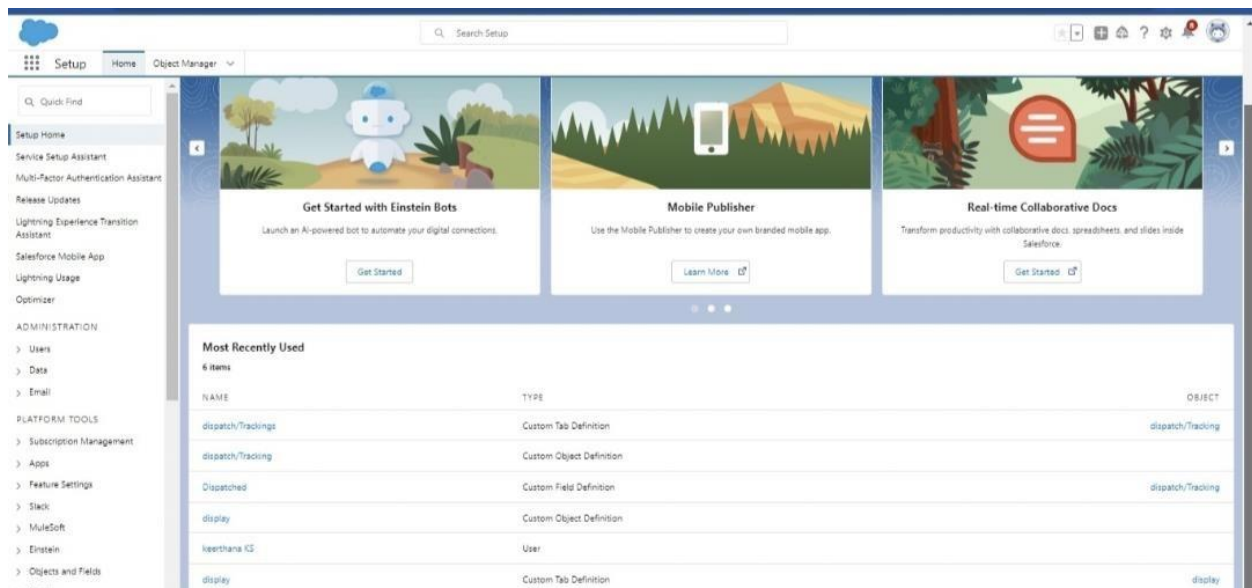
Milestone 3 Relationship between objects

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, give it has sales order and click next.

   1) Select visible for all profiles in field level security and select page layout in next page and

save it.
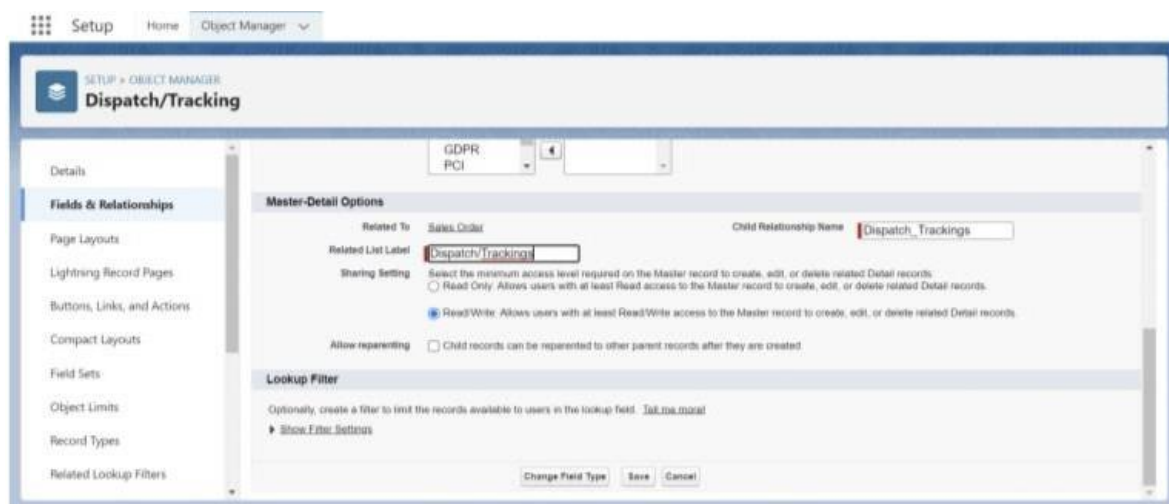
Milestone 4 Application

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 from factors- 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.**
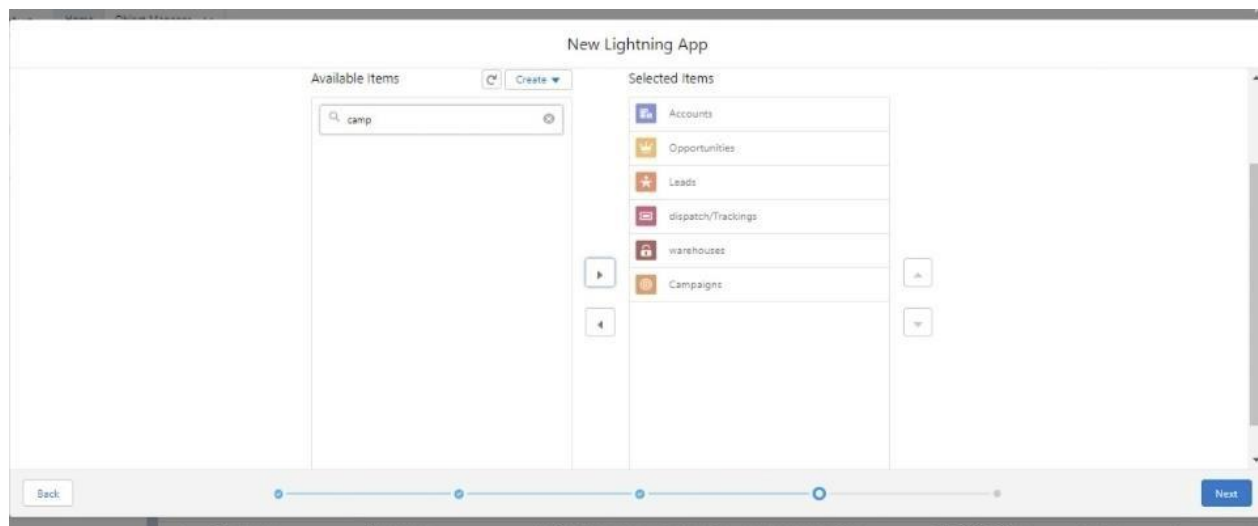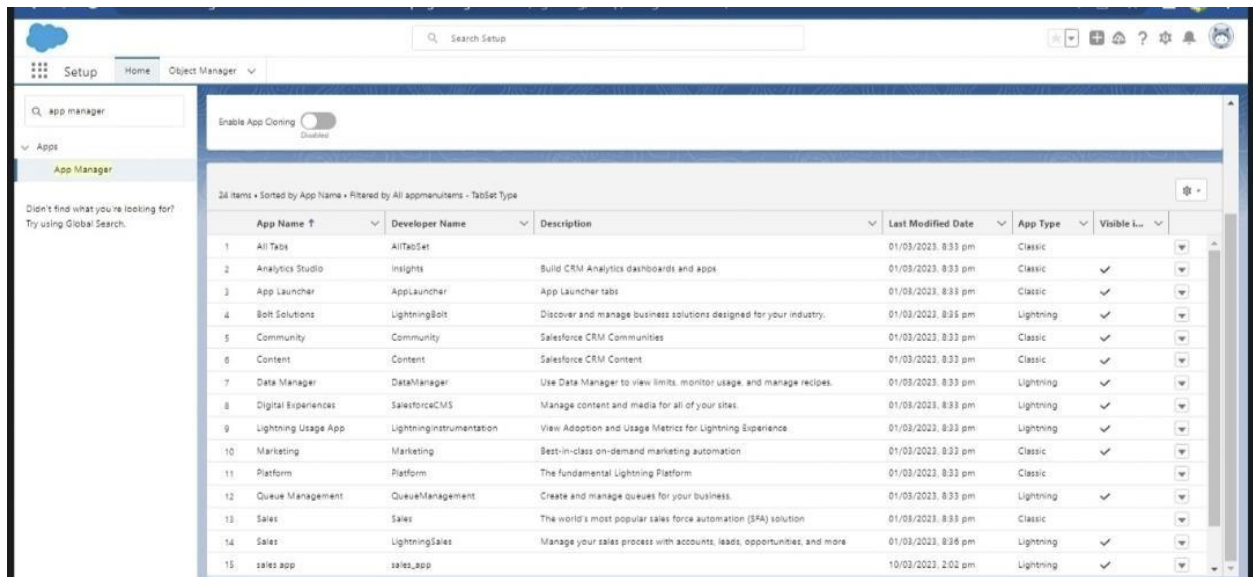
Milestone 5 Layout

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.**
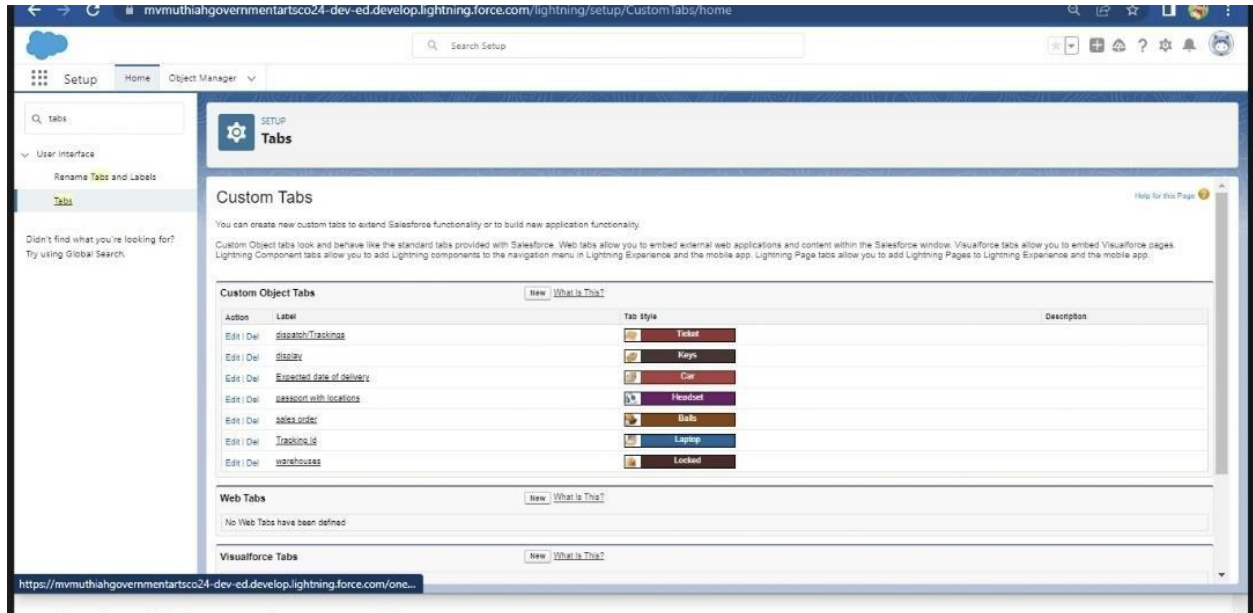
Milestone 6 User

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 user

immediately.
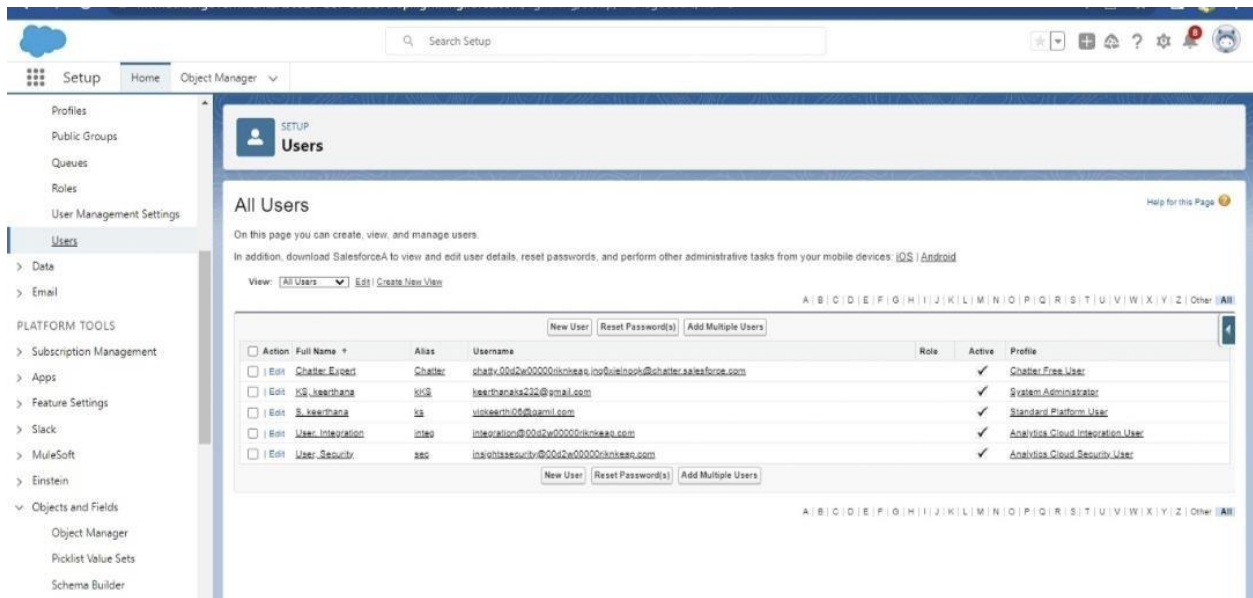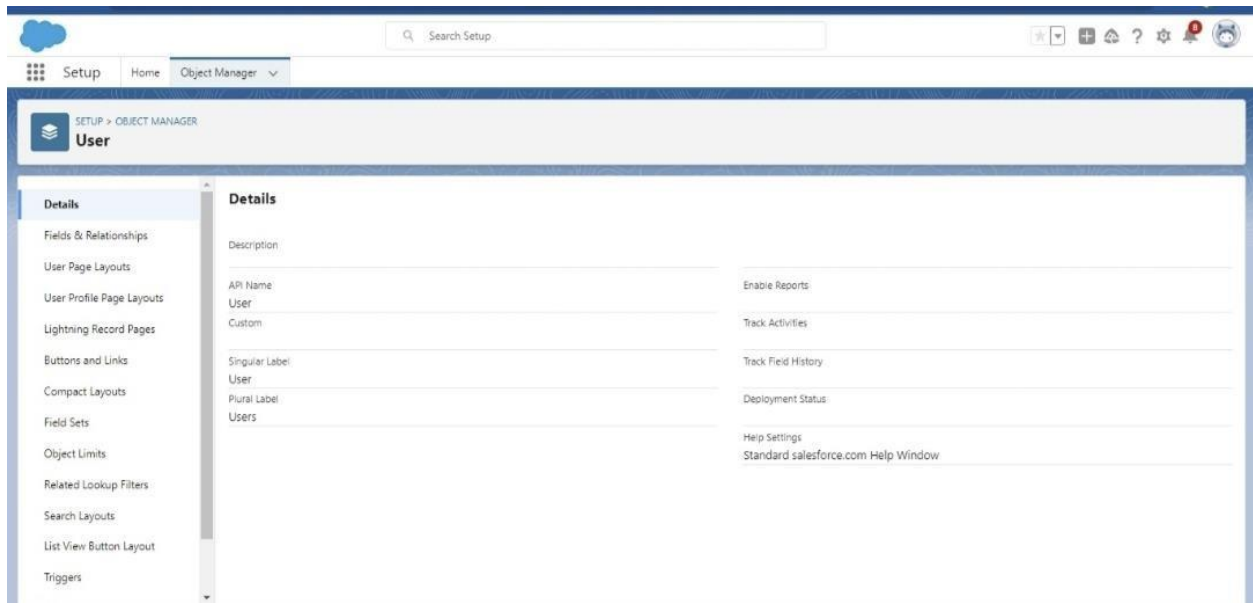
Milestone 7 Validation Rules

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) <> "+".

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

code).
5) In error location select top of the field.
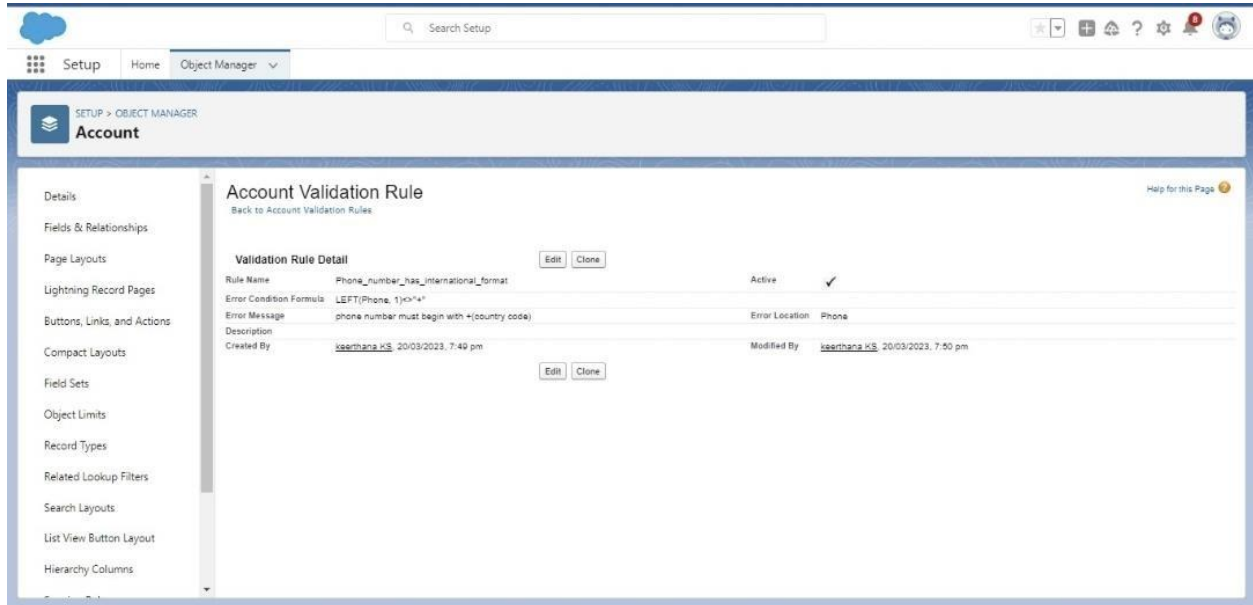
Cross object Formula

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.
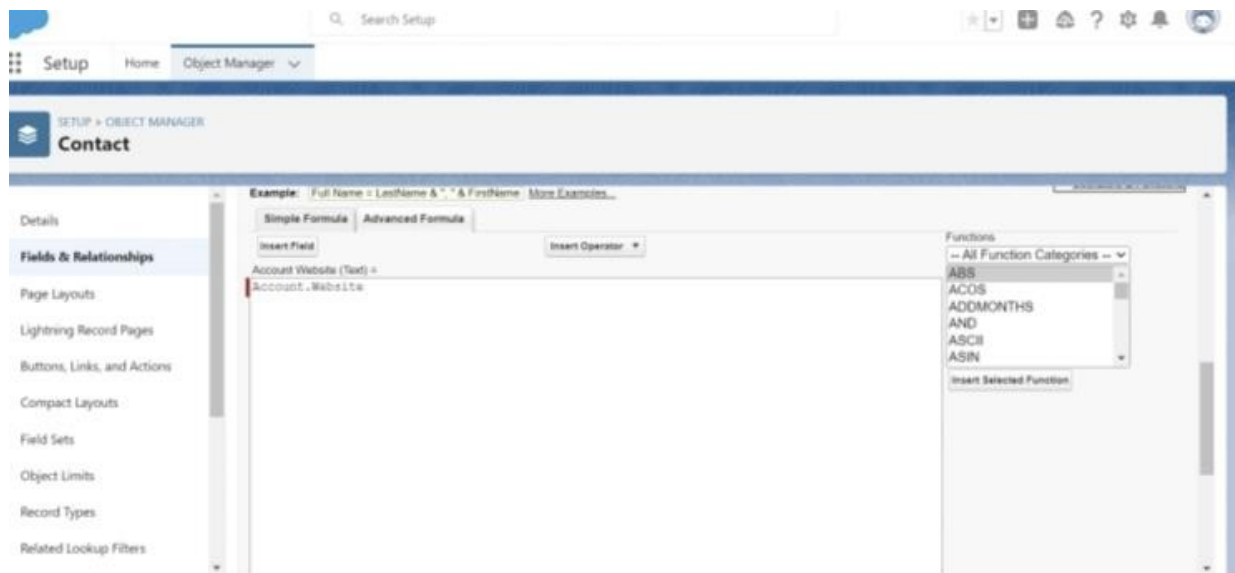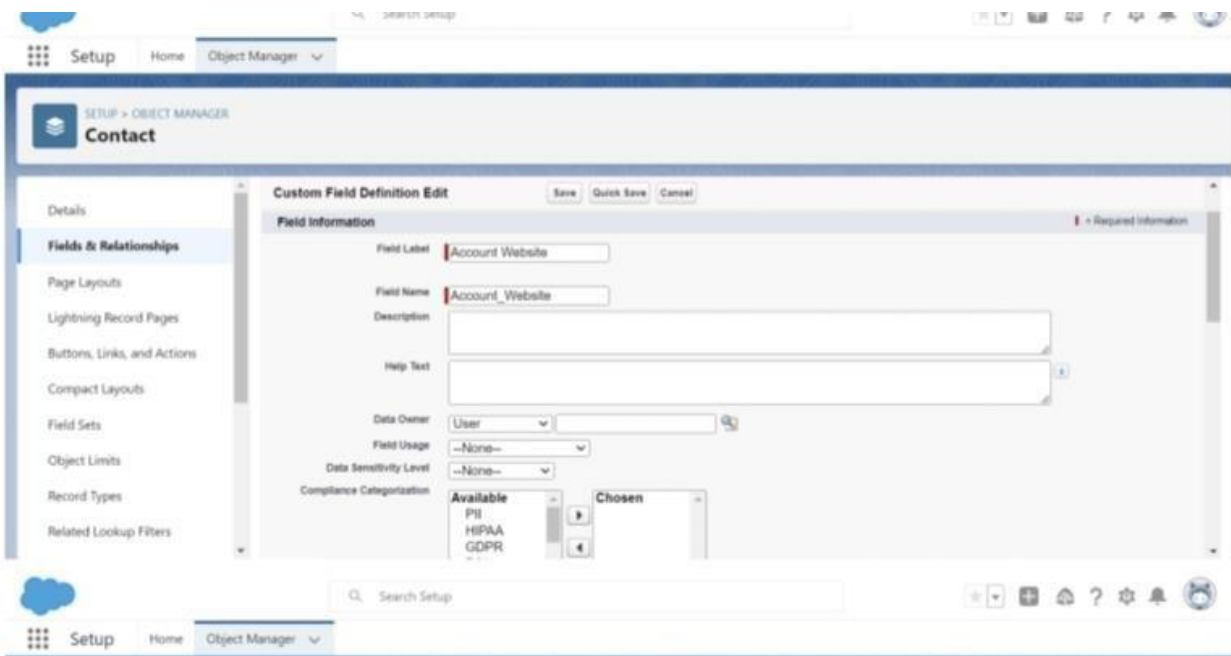
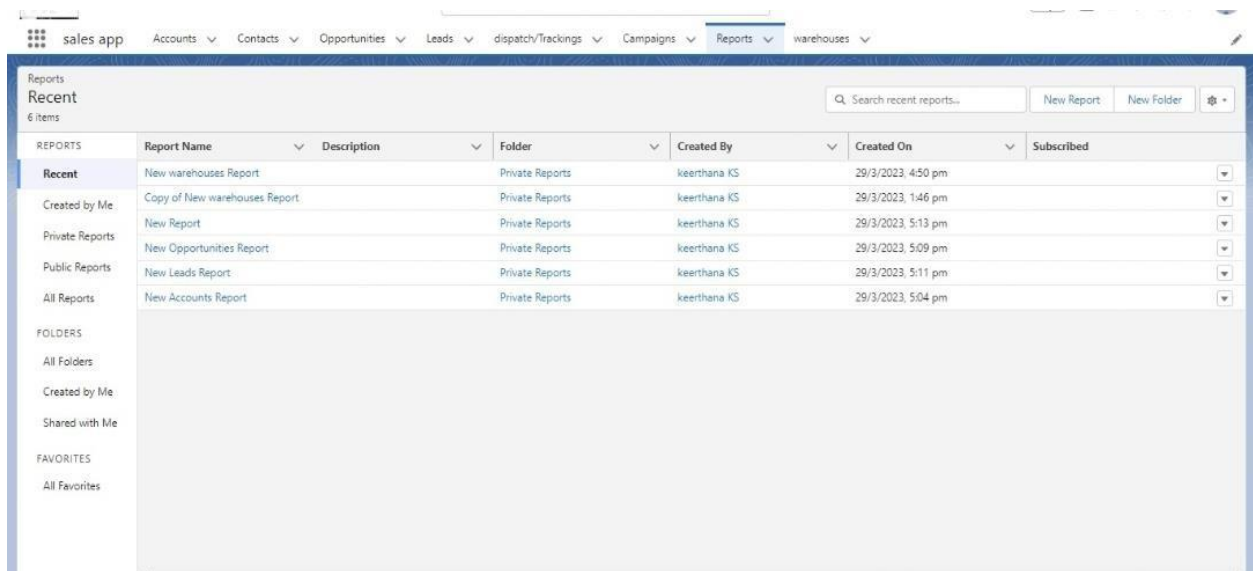## Milestone 7 Reports

Activity 1

Creation of

report

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

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.

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


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.
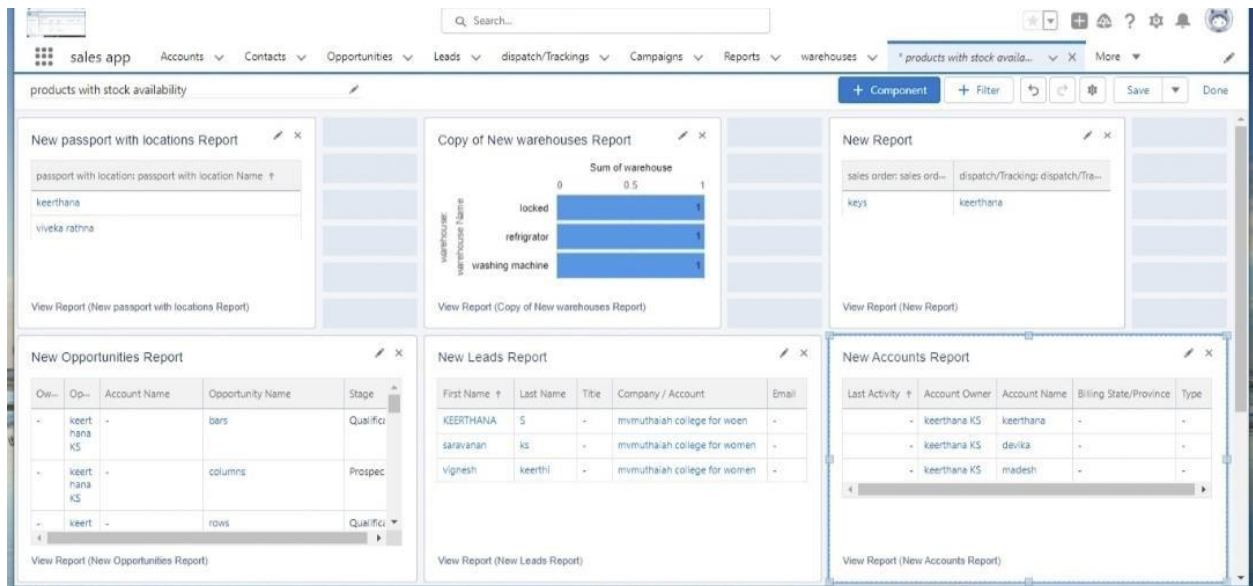
7   Conclusion

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.