

RETAIL MANAGEMENT APPLICATION USING
SALESFORCE

1. INTRODUCTION

1.1 OVERVIEW:

The application will be designed to help retailers manage various aspects of their business, such as sales, inventory, customer management, and marketing. It will also provide real-time analytics and reporting, allowing retailers to make data-driven decisions.

The project will involve the following key activities:

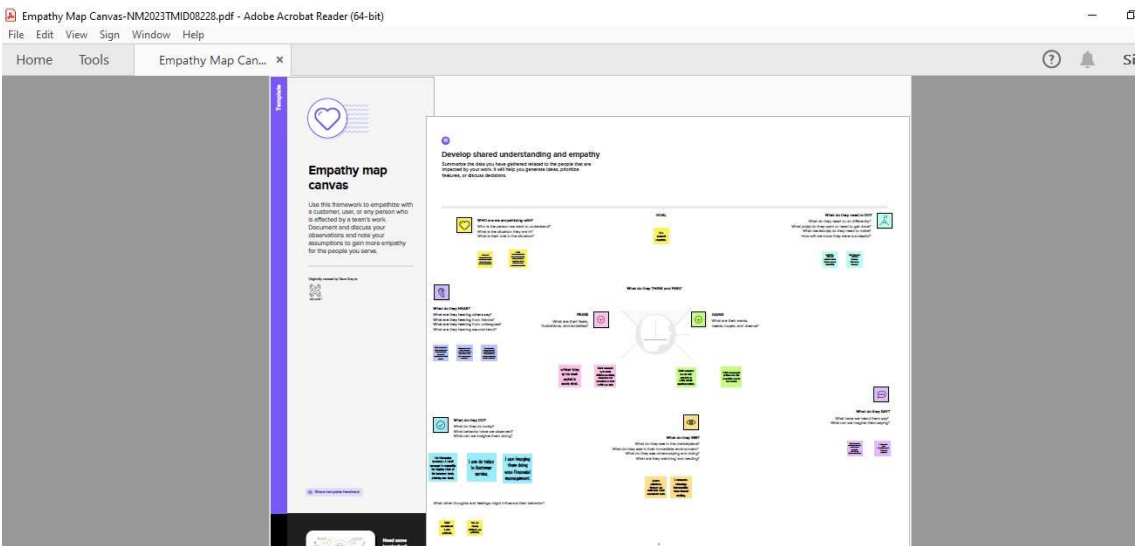
1. ***Requirement Analysis:*** In this phase, the requirements of the retail business will be analysed to determine the key features and functionalities required in the application. This phase will involve consultation with the stakeholders to ensure that the application meets their specific needs.
2. ***Design and Development:*** Based on the requirements analysis, the application will be designed and developed. The development process will involve the use of the Salesforce platform, including Apex programming language, Visualforce pages, and Lightning components.
3. ***Testing:*** Once the application is developed, it will be thoroughly tested to ensure that it meets the functional and performance requirements. This phase will involve both manual and automated testing.
4. ***Deployment:*** After testing, the application will be deployed to the production environment, and the retail business will be trained on how to use the application effectively.

1.2 PURPOSE:

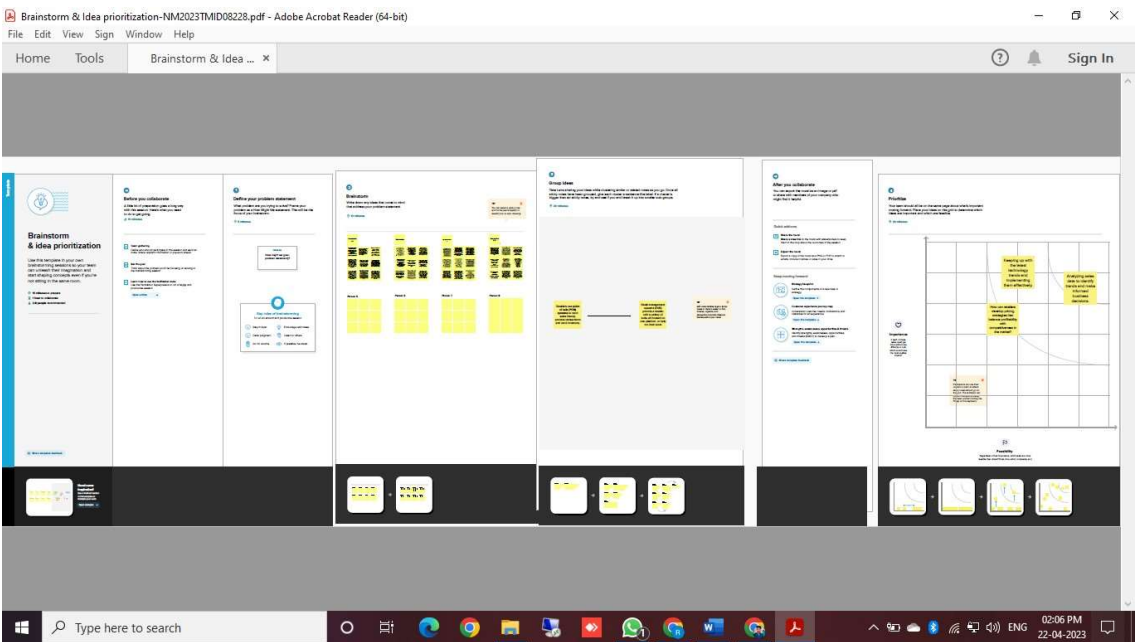
1. Improving sales performance by providing sales teams with real-time access to customer information, sales data, and performance metrics.
2. Enhancing inventory management by providing retailers with a real-time view of their inventory levels, helping to reduce stockouts and improve supply chain efficiency.
3. Strengthening customer relationships by providing a 360-degree view of customer interactions, including purchase history, preferences, and feedback.
4. Streamlining employee performance tracking by providing managers with access to performance metrics, such as sales targets, customer satisfaction ratings, and attendance records.

2. Problem Definition & Design Thinking:

2.1 Empathy Map:



2.2 Ideation & Brainstorming Map:



3.RESULT:

3.1 Data Model

Object Name	Fields in the object	
Dispatched/Tracking	Field label	Data type
	Dispatched	Checkbox
	Expected date of delivery	Date
	Tracking Id	Checkbox
	Sales order	Master-Detail(order)

Milestone 2 – Objects:

Objects are database tables that permit you to store data that is specific to an organization. Salesforce objects are of two types:

1. Standard Objects
2. Custom Objects

Objects involved in retail management are:

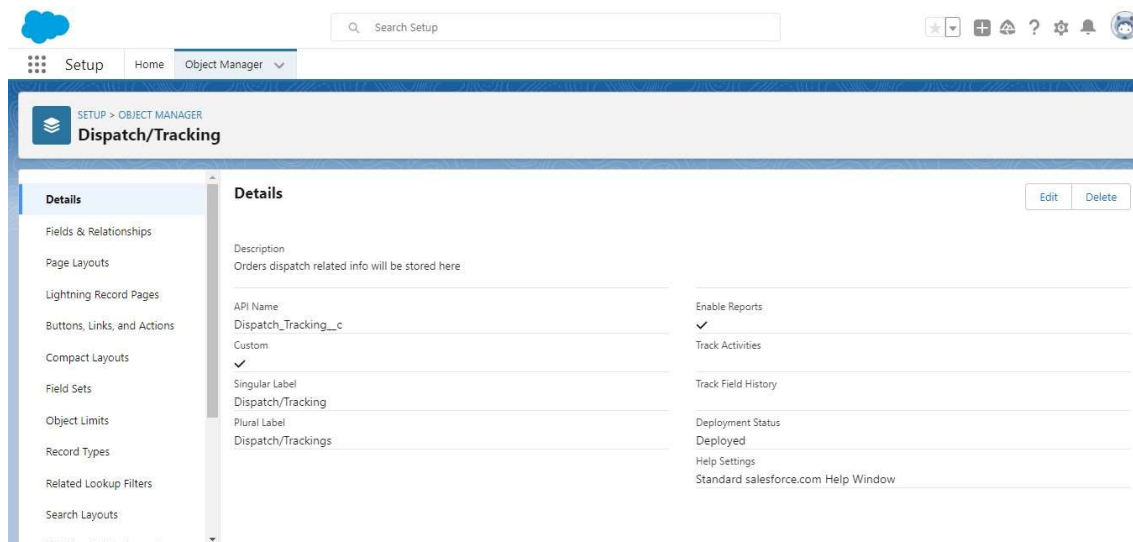
Application	Object	Description
Sales app	Campaign	We do promotions by using this object.
	Leads	We capture leads here.
	Accounts	We capture customers data.
	Contacts	Employees data of customer.
	Opportunities	SMB sales orders data.
	Products	Here we store product details.
	Warehouse	We capture stocks data.
	Sales order	This is an actual order and invoice.
	Dispatch/Tracking	Orders dispatch related info here.

Application	Object	Description
Service app	Cases	Historical problems of customers will be stored here.
	Accounts	We capture customers data.

Activity – 1:

Creation of object Dispatch/Tracking

1. Label: Dispatch/Tracking
2. Plural label: Dispatch/Tracking's
3. Record Name: Dispatch/Tracking Name
4. Data type: Text
5. Optional Features: Allow Reports and Track Field History Selected.
6. Deployment Status: Deployed is selected.
7. Search Status: Allow Search selected.
8. Object Creation: Add Notes and Attachments Selected.



The screenshot shows the Salesforce Object Manager interface for the 'Dispatch/Tracking' object. The left sidebar contains a 'Details' section with a list of configuration options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area displays the 'Details' for the object, including the following fields and values:

- Description: Orders dispatch related info will be stored here
- API Name: Dispatch_Tracking__c
- Custom: ☒
- Singular Label: Dispatch/Tracking
- Plural Label: Dispatch/Trackings
- Enable Reports: ☒
- Track Activities: ☒
- Track Field History: ☒
- Deployment Status: Deployed
- Help Settings: Standard salesforce.com Help Window

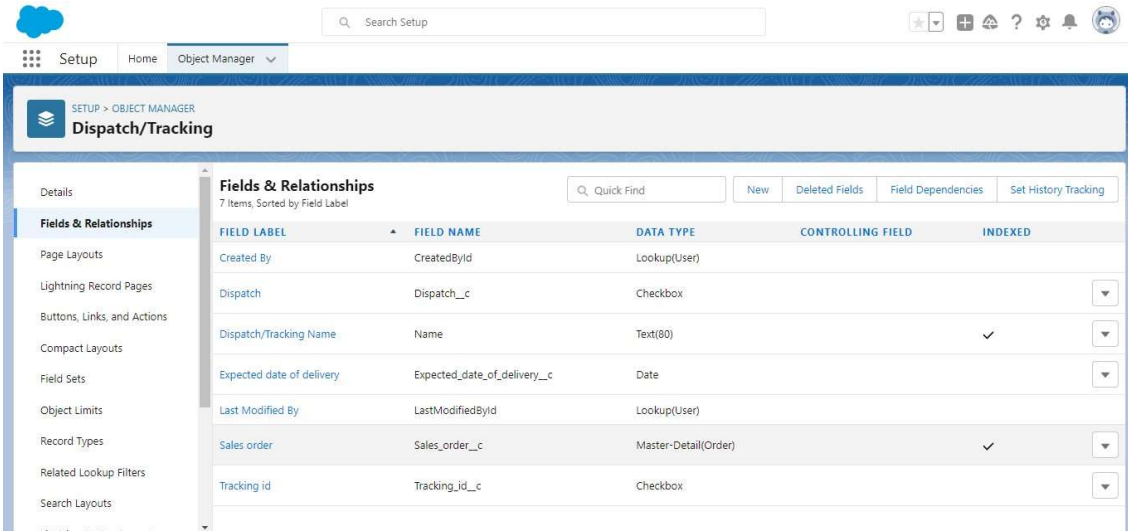
At the top right of the main content area, there are 'Edit' and 'Delete' buttons.

Activity – 2:

Fields available on Dispatch/tracking

- 1) Dispatched
- 2) Expected date of delivery
- 3) Tracking Id
- 4) Sales order

Creation of fields on Dispatch/tracking



The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with options like Setup, Home, and Object Manager. The main content area is titled 'Dispatch/Tracking' and shows the 'Fields & Relationships' section. A table lists the fields for this object, including 'Created By', 'Dispatch', 'Dispatch/Tracking Name', 'Expected date of delivery', 'Last Modified By', 'Sales order', and 'Tracking id'. Each row shows the field label, name, data type, and whether it is indexed or a controlling field.

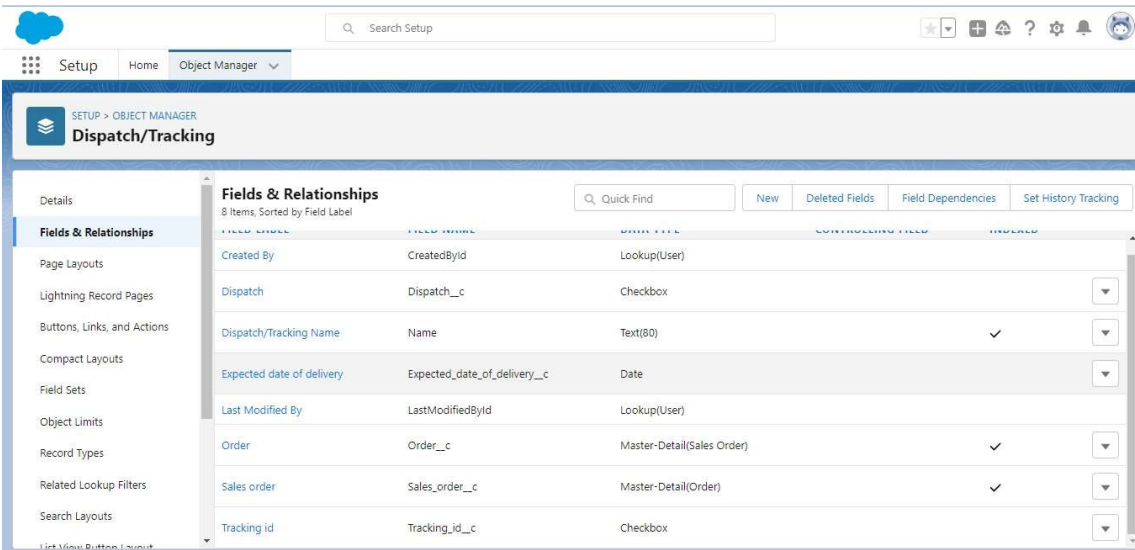
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Dispatch	Dispatch__c	Checkbox		
Dispatch/Tracking Name	Name	Text(80)		✓
Expected date of delivery	Expected_date_of_delivery__c	Date		
Last Modified By	LastModifiedById	Lookup(User)		
Sales order	Sales_order__c	Master-Detail(Order)		✓
Tracking id	Tracking_id__c	Checkbox		

1. Go to setup and select object Manager
2. Select the Dispatch/Tracking object
3. Then select the fields & relationships on a Dispatch/Tracking object
4. Click new and create a new field on a Dispatch/Tracking object
5. Then create the following fields on Dispatch/Tracking object
 - i. Dispatched
 - ii. Expected date of delivery
 - iii. Tracking id
 - iv. Sales order

Milestone 3 – Relationship between Objects:

Activity-1:

Creation of relationship between objects



Master Detail relationship between Dispatch/tracking and sales order was created.

Milestone 4 – Applications:

Activity – 1:

Creation of Application

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

24 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

App Name	Developer Name	Description	Last Modified	App Type	Visible
14 Sales	Sales	The world's most popular sales force automation (...)	08/03/2023, 2:12 pm	Classic	
15 Sales	LightningSales	Manage your sales process with accounts, leads, o...	08/03/2023, 2:15 pm	Lightning	✓
16 Sales App	Sales_App		08/04/2023, 6:04 pm	Lightning	✓
17 Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with m...	08/03/2023, 2:12 pm	Lightning	✓
18 Salesforce Chatter	Chatter	The Salesforce Chatter social network, including o...	08/03/2023, 2:12 pm	Classic	✓

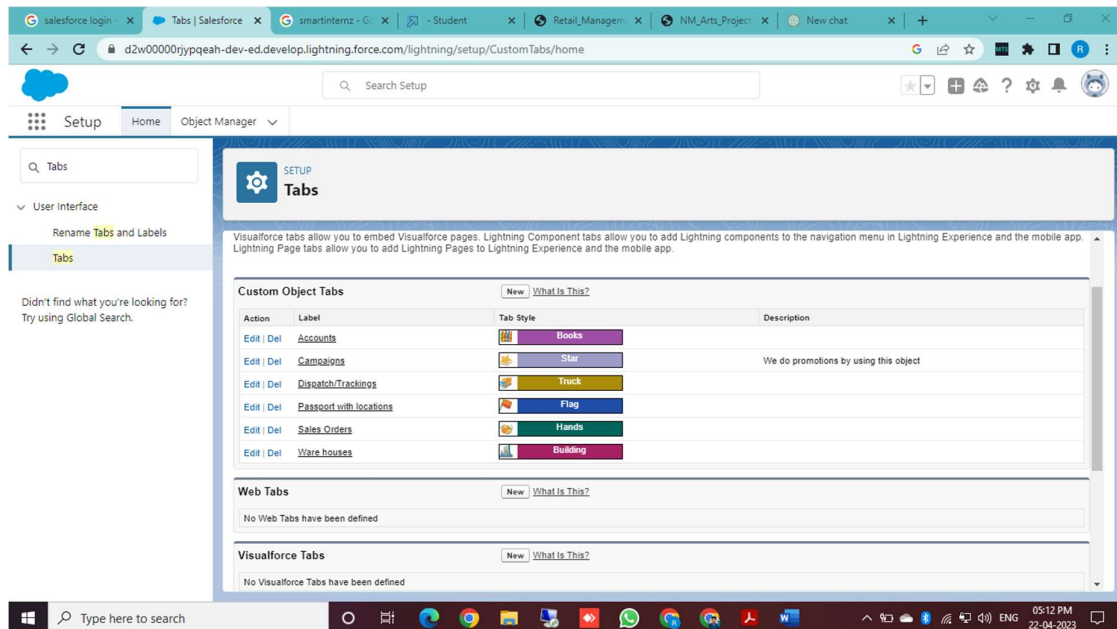
Milestone 5 – Layouts:

Activity – 1:

Creation of custom Tabs:

Creation of custom tabs for the following objects:

- 1) Warehouse
- 2) Sales order
- 3) Dispatch/Tracking

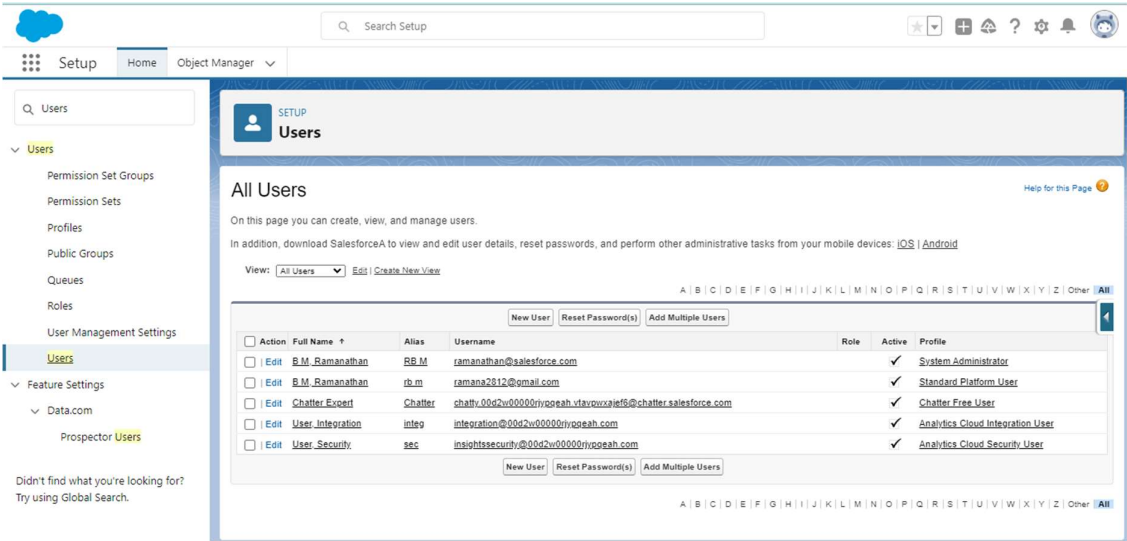


Milestone 6 – User:

Activity-1:

Creation of User

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account.

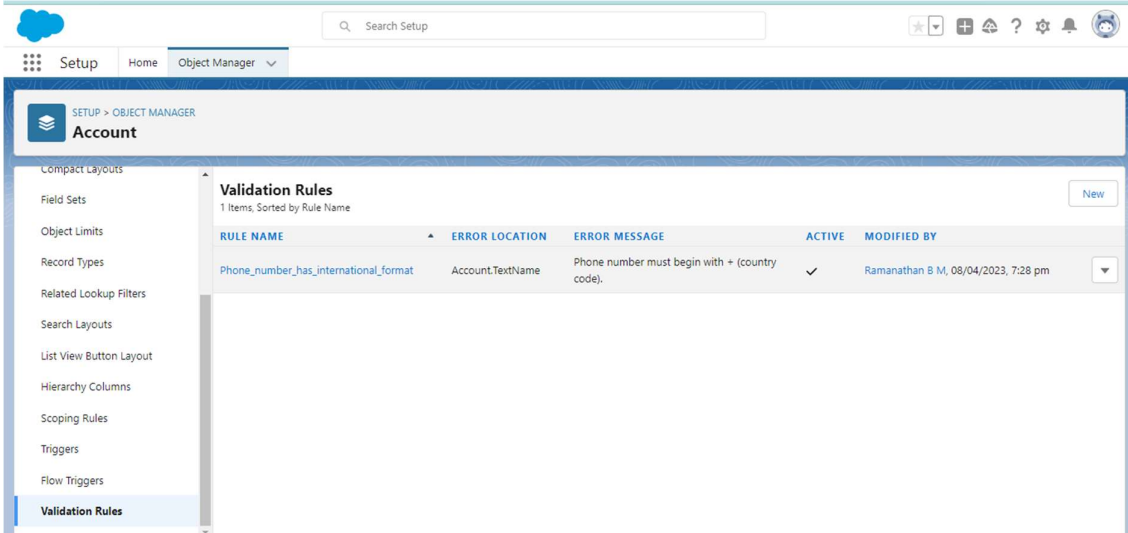


Milestone 6 – Validation Rules:

Validation rules verify that the data a user enters in a record meets the standards you specify before the user can save the record. As a crm product owner they requested to create a validation rule on account object on the phone field.

Activity – 1:

Creation of validation rule:



The screenshot shows the Salesforce Setup interface. The top navigation bar includes the Salesforce logo, a search bar labeled "Search Setup", and several utility icons. Below the navigation bar, the "Setup" menu is expanded, showing "Home" and "Object Manager". The "Object Manager" page is selected, displaying a list of objects. The "Account" object is selected, and the "Validation Rules" section is expanded. The "Validation Rules" table shows one rule: "Phone_number_has_international_format". The rule is active and was modified by "Ramanathan B M" on "08/04/2023, 7:28 pm". The rule's error message is "Phone number must begin with + (country code)".

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Phone_number_has_international_format	Account.TextName	Phone number must begin with + (country code).	✓	Ramanathan B M, 08/04/2023, 7:28 pm

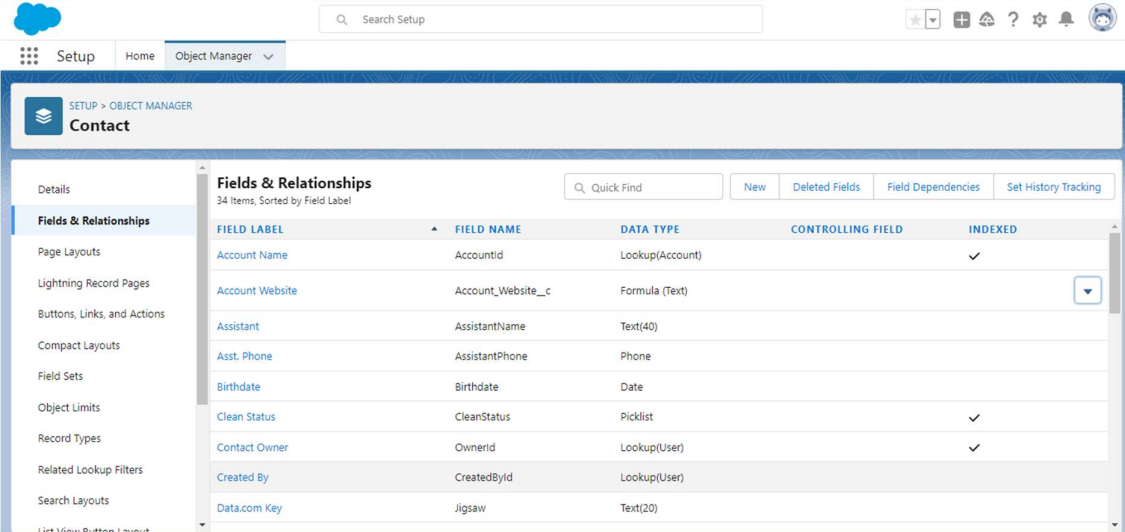
Validation rules was created for the Account object.

Activity – 2:

Cross object Formula:

Using an object formula lets you reference merge fields on a master object from a master detail relationship on the detail object. As a crm product owner they want to save user's clicks and displays contacts' parent accounts website value on the contact record so users do not have to click on the account to find the website.

Creation of cross object:



The screenshot shows the Salesforce Setup interface, specifically the Object Manager for the Contact object. The left sidebar contains navigation links: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Fields & Relationships' and shows a list of 34 items, sorted by Field Label. The table below lists the fields and their properties.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Account Name	Accountid	Lookup(Account)		✓
Account Website	Account_Website__c	Formula (Text)		
Assistant	AssistantName	Text(40)		
Asst. Phone	AssistantPhone	Phone		
Birthdate	Birthdate	Date		
Clean Status	CleanStatus	Picklist		✓
Contact Owner	OwnerId	Lookup(User)		✓
Created By	CreatedById	Lookup(User)		
Data.com Key	Jigsaw	Text(20)		

The cross object was created for the contact object.

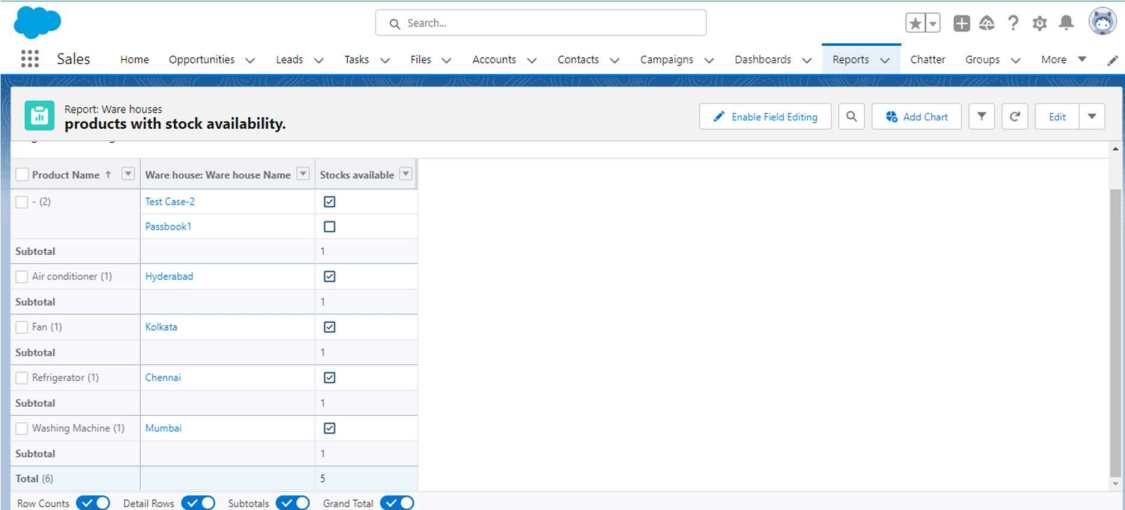
Milestone 7 – Reports:

A report is a list of records that meet the criteria you define. It's displayed in Salesforce in rows and columns, and can be filtered, grouped, or displayed in a graphical chart. Every report is stored in a folder. Folders can be public, hidden, or shared, and can be set to read-only or read/write

Activity:

Creation of report

While creation of report ensure that update preview automatically is selected which is available at the right side of the report page.



Product Name	Ware house: Ware house Name	Stocks available
- (2)	Test Case-2	<input checked="" type="checkbox"/>
	Passbook1	<input type="checkbox"/>
Subtotal		1
Air conditioner (1)	Hyderabad	<input checked="" type="checkbox"/>
Subtotal		1
Fan (1)	Kolkata	<input checked="" type="checkbox"/>
Subtotal		1
Refrigerator (1)	Chennai	<input checked="" type="checkbox"/>
Subtotal		1
Washing Machine (1)	Mumbai	<input checked="" type="checkbox"/>
Subtotal		1
Total (6)		5

Row Counts ☒ Detail Rows ☒ Subtotals ☒ Grand Total ☒

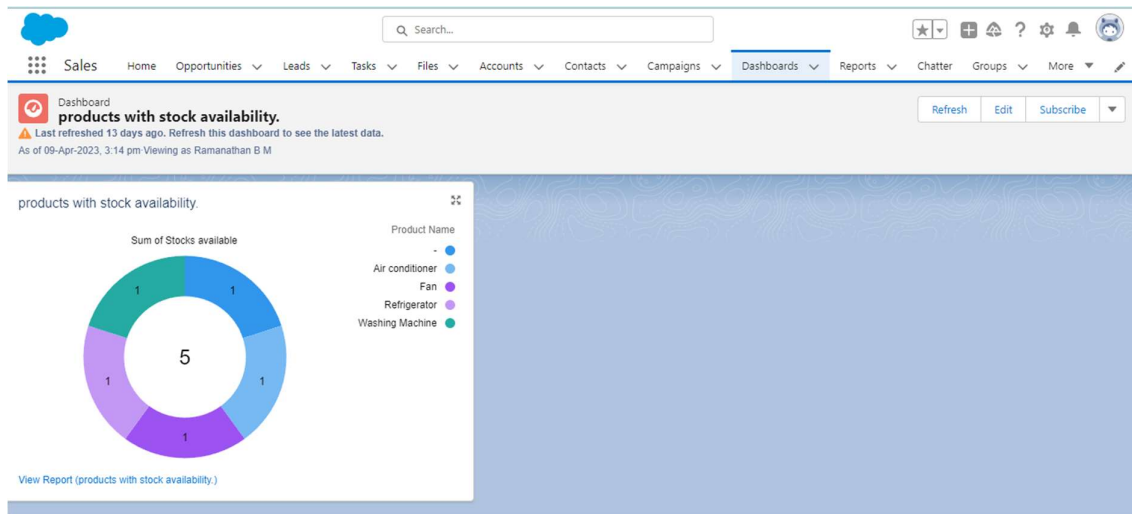
The Report was created for the warehouse object.

Milestone 8 – Dashboards:

Dashboards in Salesforce are a graphical representation of Reports. It shows data from source reports as visual components

Activity:

Creation of Dashboards



The Dashboard was created based on the report's topic products with stocks availability.

The Dashboard was created for the warehouse object.

4. Trailhead Profile Public URL:

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

Team Member 1 - <https://trailblazer.me/id/rambm2>

Team Member 2 - <https://trailblazer.me/id/manika12>

Team Member 3 – <https://trailblazer.me/id/tbhai17>

5. Advantages:

1. **Efficient Inventory Management:** Salesforce can be used to manage inventory efficiently by tracking the stock levels, sales trends, and reorder points. It can also provide real-time inventory data, which helps retailers to make informed decisions about restocking and ordering.
2. **Enhanced Customer Experience:** Salesforce can help retailers to understand their customers better by analysing their purchase history, preferences, and behaviour. This information can be used to personalize customer interactions and provide a better shopping experience.
3. **Streamlined Operations:** Retailers can use Salesforce to automate manual processes, such as order processing, invoicing, and shipping. This saves time and reduces errors, enabling retailers to focus on other important aspects of their business.

6.Applications:

1. **Sales Management:** Salesforce can help manage retail sales by providing tools to track leads, deals, and opportunities. This includes managing customer data, tracking orders, and managing inventory.
2. **Customer Relationship Management (CRM):** Salesforce can help retail businesses build customer relationships and manage interactions. This includes tracking customer behaviour, communication history, and preferences. This information can be used to personalize marketing efforts, loyalty programs, and support.
3. **Inventory Management:** Salesforce can help retail businesses manage their inventory levels, track stock levels, and manage supply chains. This includes tracking product availability, delivery schedules, and inventory forecasting.

7.Conclusion:

Salesforce is a popular platform for developing such applications, as it provides a range of tools and features for building custom solutions. Some of the key benefits of using Salesforce for retail management include its scalability, flexibility, and ease of use.

Assuming the project was successful, it is likely that the application developed will help retail businesses to streamline their operations, improve their customer experience, and ultimately increase their profits. It may also help businesses to gain insights into their operations, such as which products are selling well and which ones are not.

Overall, the Retail Management Application using Salesforce project is likely to have been a valuable investment for any retail business looking to improve its operations and stay competitive in a rapidly changing industry.

8. Future Scope:

1. **Integration with other platforms:** The application can be integrated with other platforms such as social media, eCommerce platforms, and customer service tools to streamline retail operations.
2. **AI-powered analytics:** The application can be enhanced with AI-powered analytics to provide real-time insights into customer behaviour, sales trends, and inventory management.
3. **Mobile Application:** Development of a mobile application for the Retail Management Application using Salesforce project could increase its usage and make it more accessible to users.
4. **Personalized customer experiences:** Retailers can leverage data to provide personalized customer experiences and tailored product recommendations, which can increase customer satisfaction and loyalty.
5. **Enhanced reporting:** The application can be enhanced to provide detailed reporting on sales, inventory, and customer behaviour, which can help retailers make informed business decisions.