BHARATHI WOMEN'S COLLEGE (AUTONOMOUS)

CHENNAI – 600108

RETAIL MANAGEMENT APPLICATION USING SALESFORCE

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OBJECTIVE :

The main objectives of retail management applications using Salesforce are to:

➢ Enhance inventory management and supply chain efficiency.

➢ Provide real-time data on sales, inventory, and customer behavior for data-driven decision-making.

➢ Improve customer engagement and satisfaction through personalized experiences.

➢ Provide support options to overcome technical challenges and optimize the application's features and capabilities.

1 . INTRODUCTION :

1.1 OVERVIEW:

➢ *Retail* management applications are software solutions designed to help retailers manage various aspects of their business operations. These applications offer a range of features to help retailers streamline their processes and make informed decisions .

➢ Some of the key features of retail management applications include inventory management, point of sale (POS) functionality, customer management, and analytics and reporting .

➢ Inventory management features allow retailers to monitor inventory levels, track product availability, and manage stock replenishment. This

can help retailers optimize their inventory levels, reduce waste, and improve overall efficiency.

➢ POS functionality enables retailers to process transactions, handle payments, and manage cash flow. This includes support for various payment methods, such as credit cards, debit cards, and mobile payments .

➢ Customer management capabilities allow retailers to collect and analyze customer data, such as purchase history and preferences. This can help retailers better understand their customers and tailor their marketing and sales efforts accordingly .

➢ Finally, analytics and reporting features provide retailers with insights into sales trends, inventory performance, and other key metrics. This information can be used to make informed decisions about pricing, product selection, and other aspects of the business .

➢ Overall, retail management applications can help retailers operate more efficiently, improve customer satisfaction, and increase profitability. They are a valuable tool for businesses of all sizes and can be customized to meet the specific needs of each retailer.

1.2 PURPOSE :

Retail management applications have a wide range of uses and can help retailers achieve many different goals. Some of the key benefits of using a retail management application include:

➢ **Improved inventory management:** Retail management applications can help retailers keep track of inventory levels, monitor product availability, and manage stock replenishment. This can help reduce waste, minimize stockouts, and optimize inventory levels to improve overall efficiency .

➢ **Streamlined POS operations:** POS functionality is a key feature of most retail management applications. This enables retailers to process transactions, handle payments, and manage cash flow more efficiently, which can help reduce transaction times, improve accuracy, and enhance the overall customer experience .

➢ **Better customer management:** Retail management applications can help retailers collect and analyze customer data, such as purchase history and preferences. This can help retailers better understand their customers, tailor their marketing and sales efforts, and improve customer satisfaction .

➢ **Increased profitability:** By optimizing inventory levels, streamlining operations, and improving customer satisfaction, retail management applications can help retailers increase profitability. Analytics and reporting features can also provide insights into sales trends, inventory performance,

and other key metrics, which can be used to make informed decisions about pricing, product selection, and other aspects of the business .
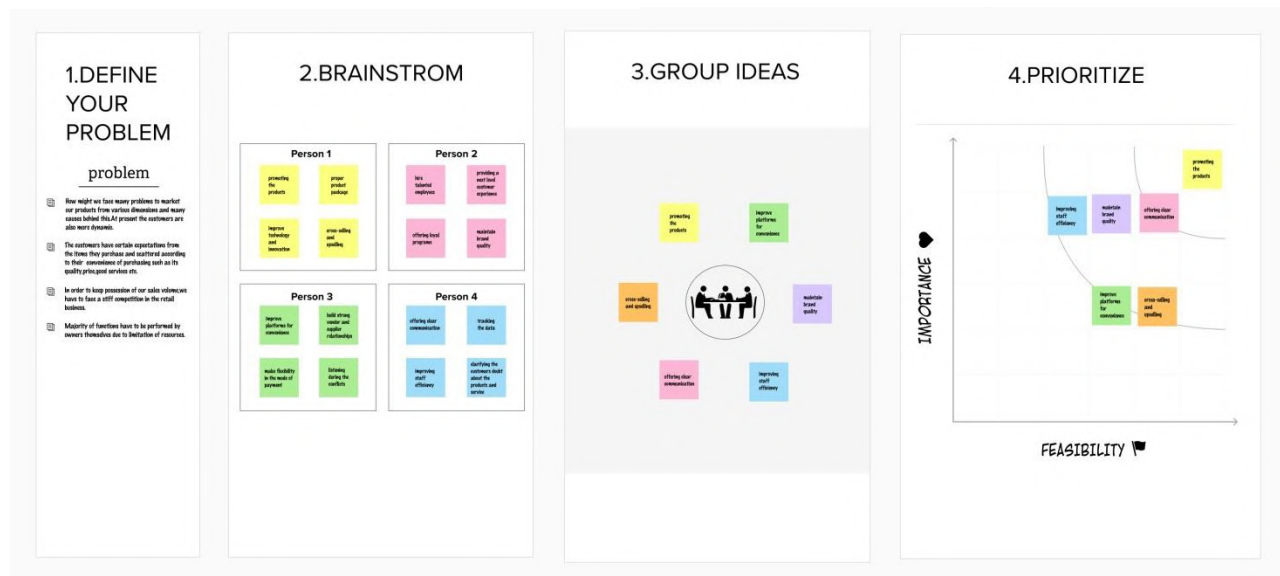
➢ **Scalability and flexibility:** Retail management applications can be customized to meet the specific needs of each retailer. This allows retailers to scale their operations, expand their product lines, and adapt to changing market conditions more easily.

2 .PROBLEM DEFINITION & DESIGN THINKING

2.1 EMPATHY MAP
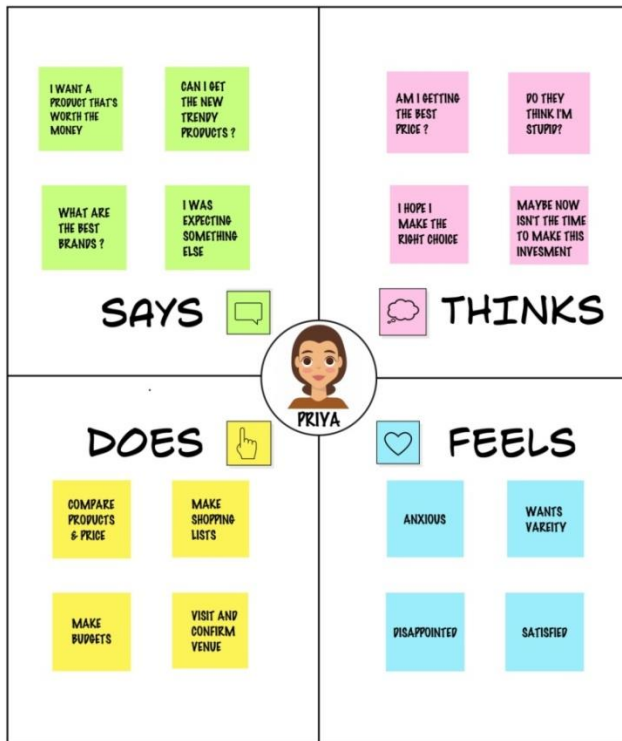
2.2 IDEATION & BRAINSTORMING MAP

*3 .*RESULT

3.1 DATA MODEL:

Object Name	Fields in the object	
Object 1		
	Field label	**Data type**
	Display/tracking	Text
	Dispatch/tracking	Checkbox
Object 2		
	Field label	**Data type**
	Sales order	Master detail relationship

3.2 ACTIVITY:

Milestone – 1 :

Creating a developer Account

Activity - 1

1. Go to developers.salesforce.com/

2. Click on sign up

3. On the sign up form, enter the following details :

4. First name & Last name

5. Email

6. Role : Developer

7. Company : College Name

8. County : India

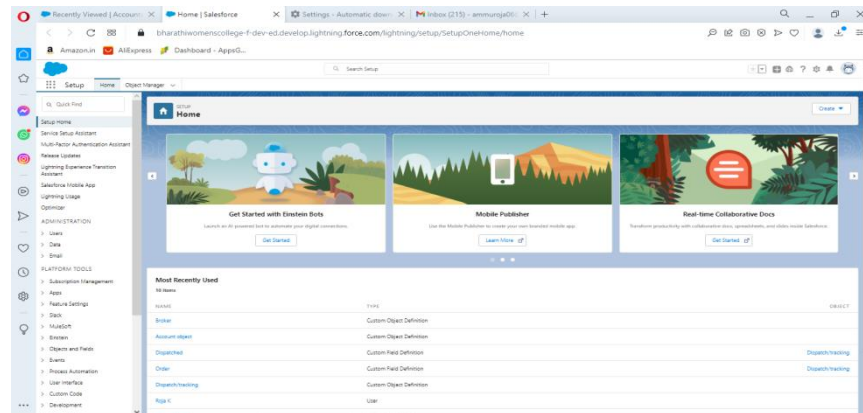9. Postal Code : pin code

Account Activation

Go to the inbox of the email that you used while signing up. Click on the verify account to
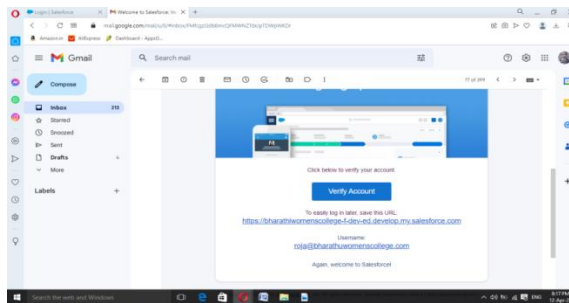
Login To Your Salesforce Account

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:

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.
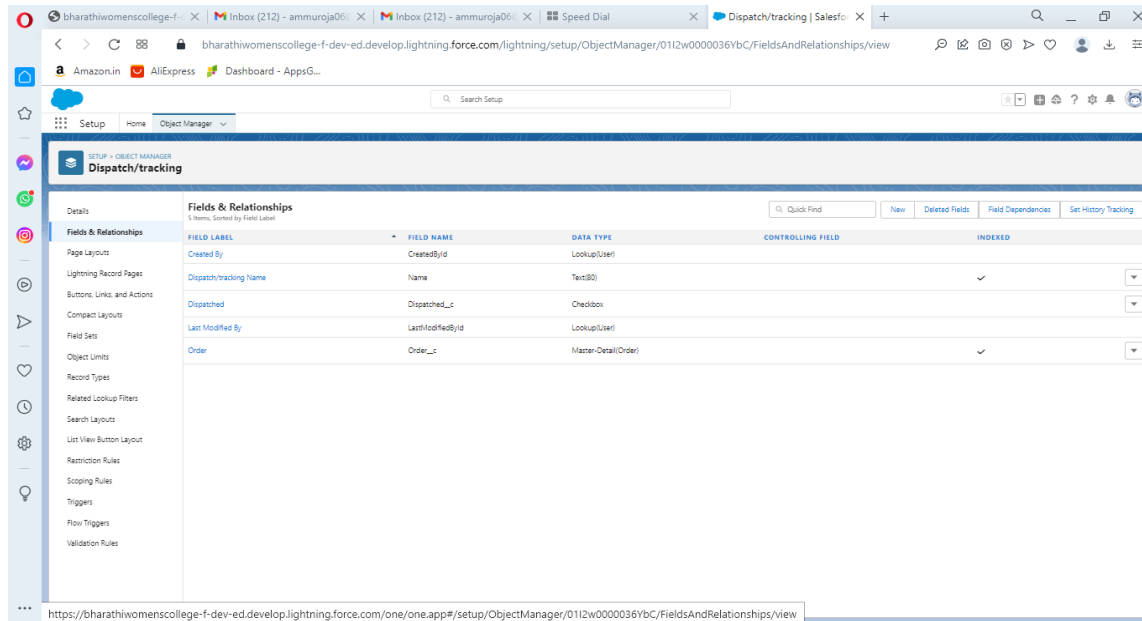
Activity – 2

Fields available on Dispatch/tracking

1) 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

required option so that always require a value in this field in order to save.

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

visible to all profiles.

9) Select the next option, select the page layout and save it.
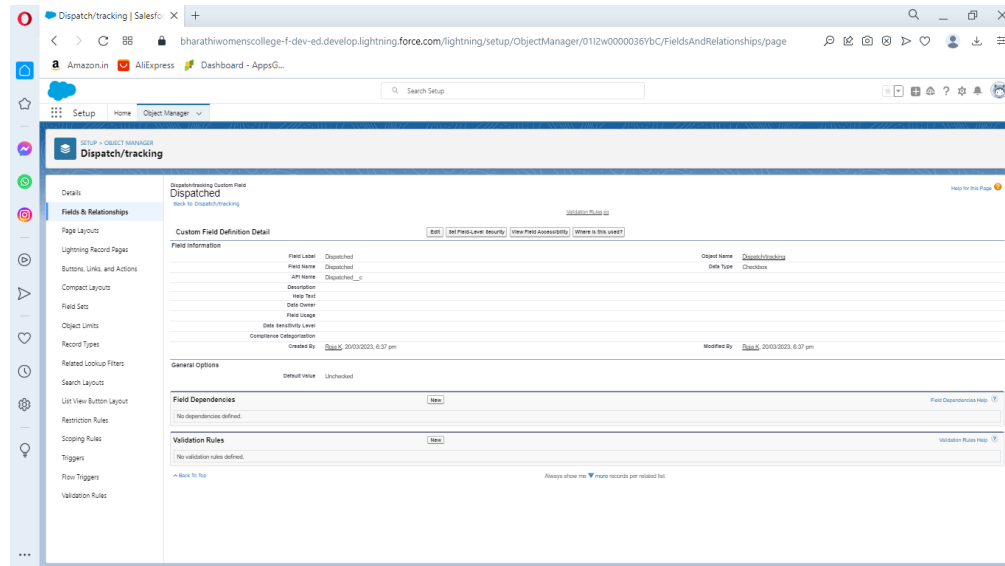
Milestone – 3 Relationship b/w objects:

Activity – 1

Creation of relationships between objects

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.

7. Select visible for all profiles in field level security and select page layout in next page and save it.
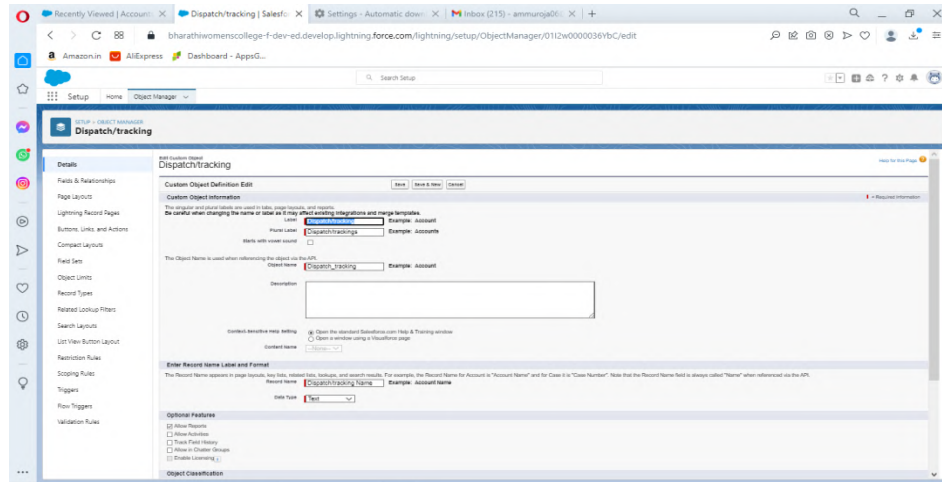
Milestone – 4 Application:

Activity – 1

Creation of 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 Layouts :

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.
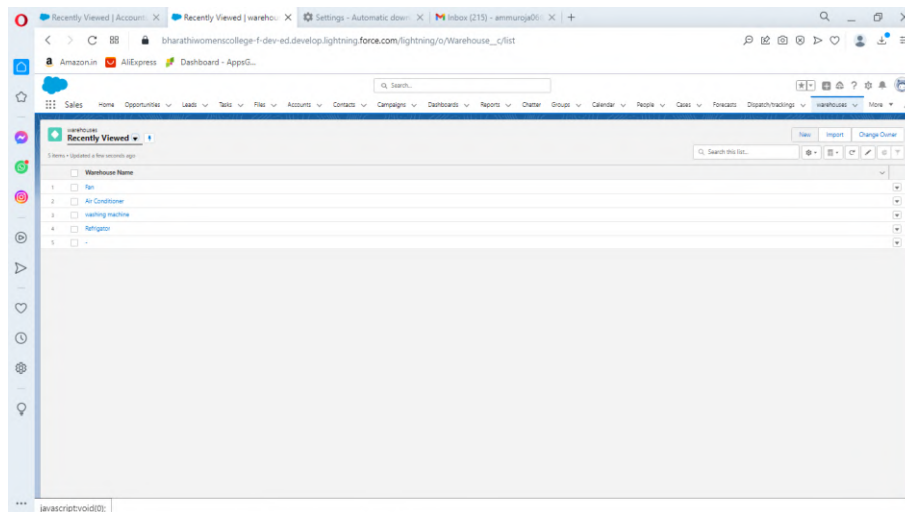
Milestone – 6 User:

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.
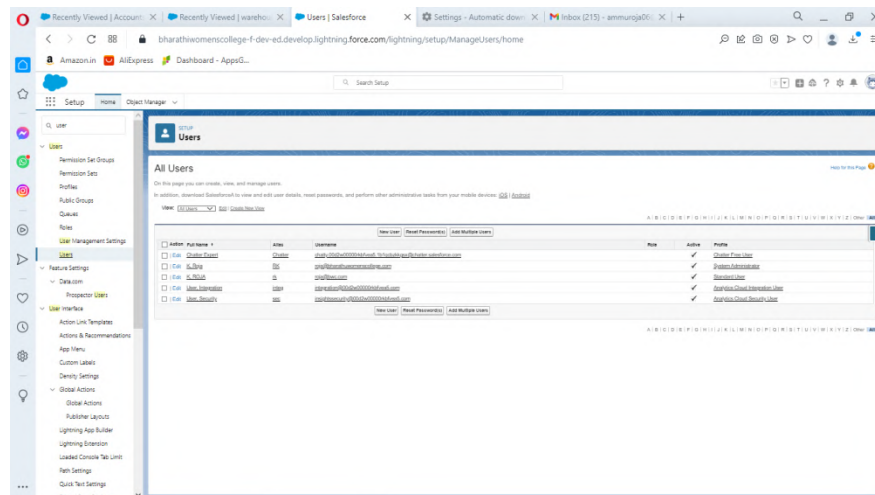
Milestone – 7 Validation Rules:

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

Has LEFT(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:

Creation of Cross Object
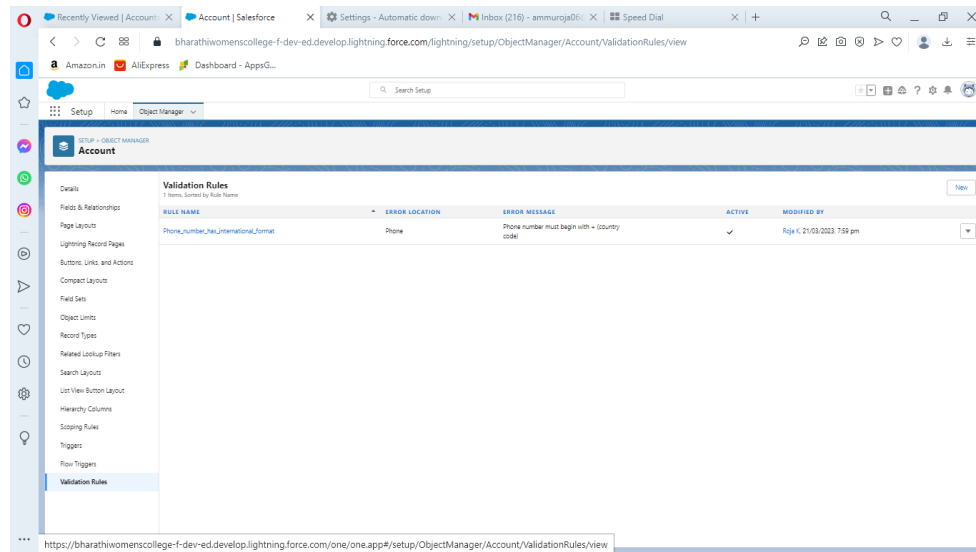
1) Select your object from object selection has Contact.

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:
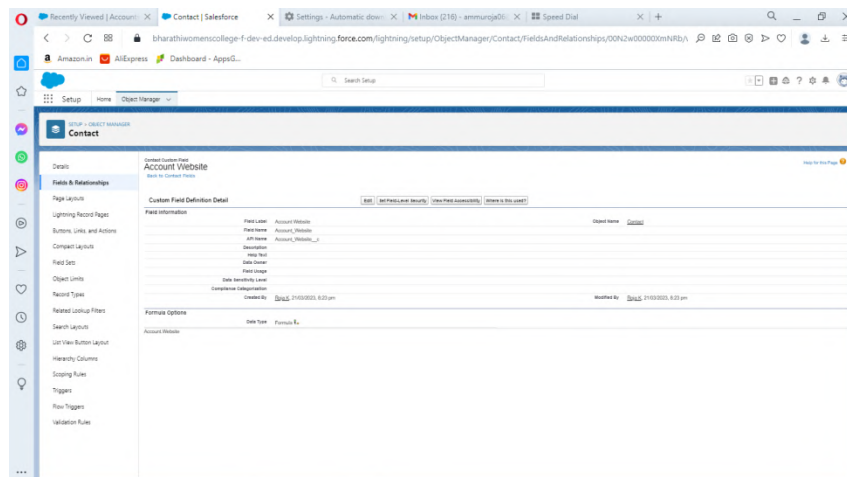
Activity – 1:

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.
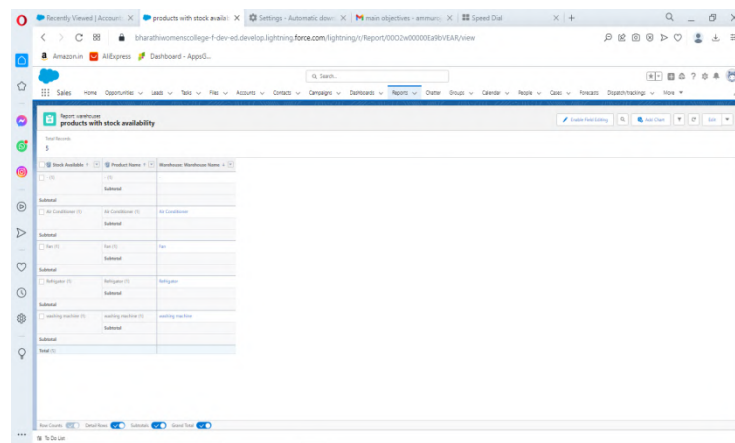
Milestone – 8 Dashboards:

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.
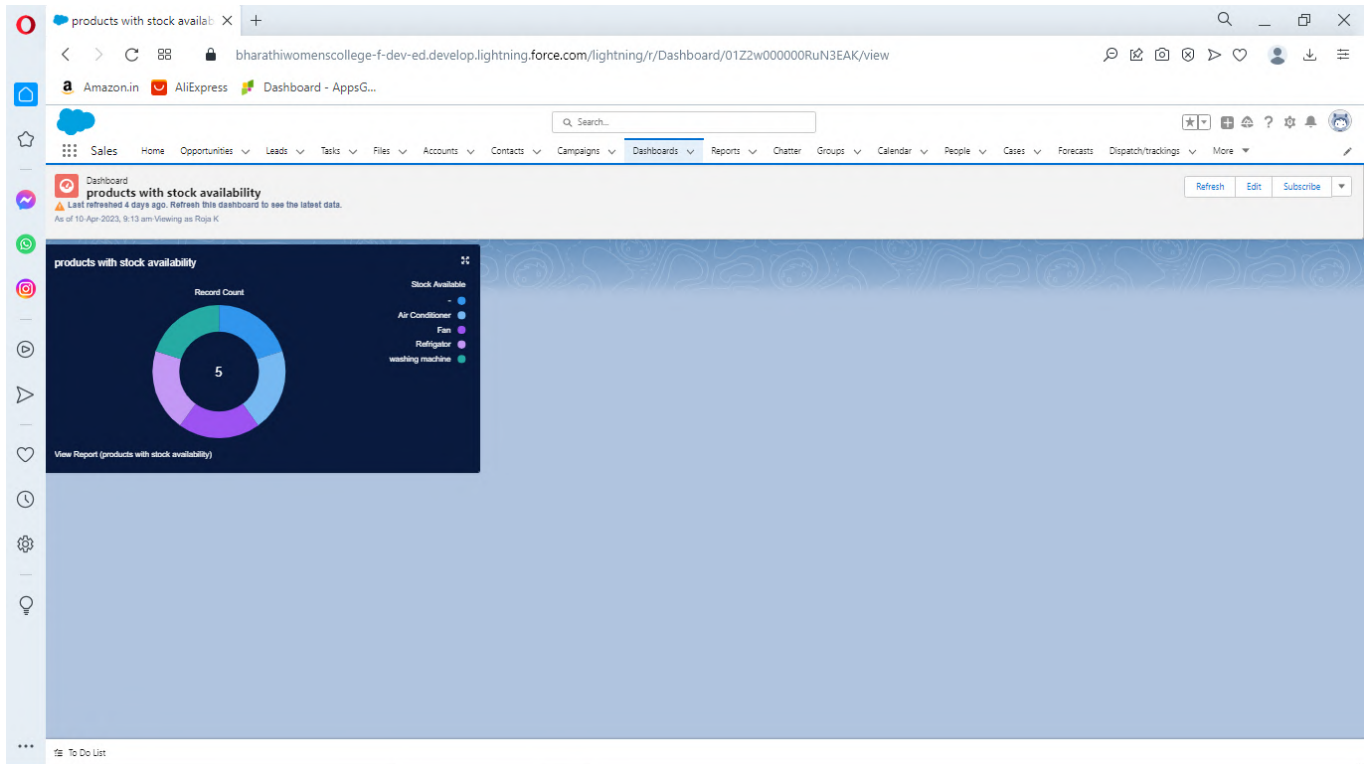
4. Trailhead Profile Public URL

Team Leader   : ROJA K   - https://trailblazer.me/id/krojak7

Team member 1: PRIYA K   -   https://trailblazer.me/id/priyakoteeswaran

Team Member 2: SNEHA K   -   https://trailblazer.me/id/sneha2314

Team Member 3: SRILEKA V   -   https://trailblazer.me/id/srilv1

 Team Member 4:YUVARANI M - https://trailblazer.me/id/yuvam14

5. ADVANTAGES & DISADVANTAGES

Advantages of retail management applications:

➢ **Improved inventory management:** Retail management applications allow retailers to track inventory levels in real-time, which can help reduce waste and minimize stock outs.

➢ **Streamlined operations**: POS functionality enables retailers to process transactions and manage cash flow more efficiently, which can help reduce transaction times and improve accuracy.

➢ **Better customer management**: Retail management applications allow retailers to collect and analyze customer data, such as purchase history and preferences, which can help improve customer satisfaction and drive sales. Increased profitability: Retail management applications provide insights into sales trends and other key metrics, which can be used to make informed decisions about pricing, product selection, and other aspects of the business.

➢ **Scalability and flexibility**: Retail management applications can be customized to meet the specific needs of each retailer, which allows them

to scale their operations, expand their product lines, and adapt to changing market conditions more easily.

Disadvantages of retail management applications:

➢ **Cost**: Retail management applications can be expensive to implement and maintain, especially for small businesses.

➢ **Complexity**: Retail management applications can be complex to set up and use, which may require additional training or technical support.

➢ **Security**: Retail management applications may contain sensitive data, such as customer information and sales data, which can be vulnerable to cyber attacks and data breaches.

➢ **Dependence on technology**: Retail management applications rely on technology to function, which can be a disadvantage if there are technical issues or system failures.

➢ **Integration issues**: Retail management applications may not integrate seamlessly with other software systems, such as accounting software, which can create additional work and complexity for retailers.

6. APPLICATIONS

Retail management applications have a wide range of applications across different industries and business types. Some of the most common applications of retail management applications include:

➢ **E-commerce**: Retail management applications are often used by e-commerce businesses to manage their online stores. These applications can help businesses track inventory levels, process online orders, and manage customer data.

➢ **Brick-and-mortar stores:** Retail management applications are also commonly used by brick-and-mortar stores to manage their operations.

These applications can help businesses track inventory levels, process transactions, and manage customer data.

➢ **Multi-channel retail**: Retail management applications can be used by businesses that operate across multiple sales channels, such as online stores, brick-and-mortar stores, and mobile sales. These applications can help businesses manage inventory levels, process transactions, and analyze sales data across all channels.

➢ **Inventory management**: Retail management applications can be used to track inventory levels, monitor product availability, and manage stock replenishment. This can help businesses reduce waste, minimize stockouts, and optimize inventory levels to improve overall efficiency.

➢ **Customer management**: Retail management applications can be used to collect and analyze customer data, such as purchase history and preferences. This can help businesses better understand their customers, tailor their marketing and sales efforts, and improve customer satisfaction.

➢ **Analytics and reporting**: Retail management applications can provide businesses with insights into sales trends, inventory performance, and other key metrics. This information can be used to make informed decisions about pricing, product selection, and other aspects of the business.

7.FUTURE SCOPE

Retail management applications have a bright future with many potential enhancements that can be made to improve their functionality and usability. Here are some areas of potential development:

➢ **Integration with artificial intelligence (AI) and machine learning**: Retail management applications can be enhanced by integrating AI and machine learning to help retailers with inventory management, price optimization, and customer personalization. This can help retailers make better decisions based on real-time data and improve customer satisfaction.

➢ **Improved mobile features**: Retail management applications can be enhanced with better mobile features, such as mobile payments, location-

based marketing, and mobile inventory management. This can help

retailers connect with customers on the go and improve their overall

shopping experience.

8.CONCLUSION

In conclusion, retail management applications are a powerful tool that can

help retailers manage their operations more efficiently, improve customer satisfaction,

and increase profitability.

These applications provide a range of benefits, including improved inventory

management, streamlined POS operations, better customer management, increased

profitability, scalability, and flexibility.

However, there are also some potential drawbacks, such as cost, complexity, security

risks, dependence on technology, and integration issues.