

REPORT FOR RETAIL MANAGEMENT APPLICATION USING SALESFORCE

1 INTRODUCTION

- Overview

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.

- Purpose

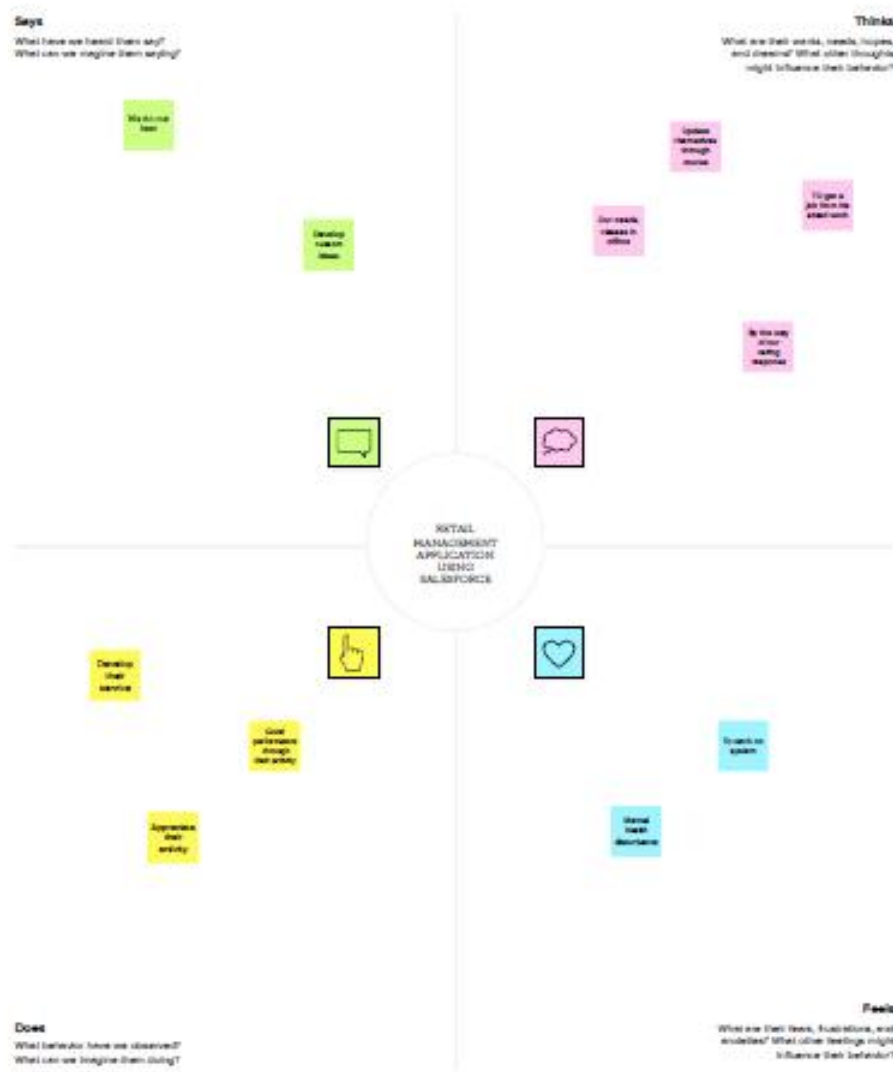
A retail management system (RMS) is a platform that combines several modules to aid in the day-to-day operation of a retail store or chain, such as managing and buying inventory, checking out customers, scheduling employee shifts, keeping track of finances, etc.

- Problem Definition & Design Thinking
- Empathy Map



Build empathy

The information you add here should be representative of the observations and research you've done about your users.



- Ideation & Brainstorming Map



Before you collaborate

A little bit of preparation goes a long way with this session. Here's what you need to do to get going.

 10 minutes



Team gathering

Define who should participate in the session and send an invite. Share relevant information or pre-work ahead.



Set the goal

Think about the problem you'll be focusing on solving in the brainstorming session.



Learn how to use the facilitation tools

Use the Facilitation Superpowers to run a happy and productive session.

[Open article](#)



Person 1



Person 2



Person 3



Person 4



Person 5



3

Group ideas

Take turns sharing your ideas while clustering similar or related notes as you go. Once all sticky notes have been grouped, give each cluster a sentence-like label. If a cluster is bigger than six sticky notes, try and see if you can break it up into smaller sub-groups.

🕒 20 minutes

leading sales automation platform for retailers	Advantage to the franchiser	speedier expansion
Retail sector yet to be recognised as an industry	high real estate costs	supply chain inefficiencies

TIP

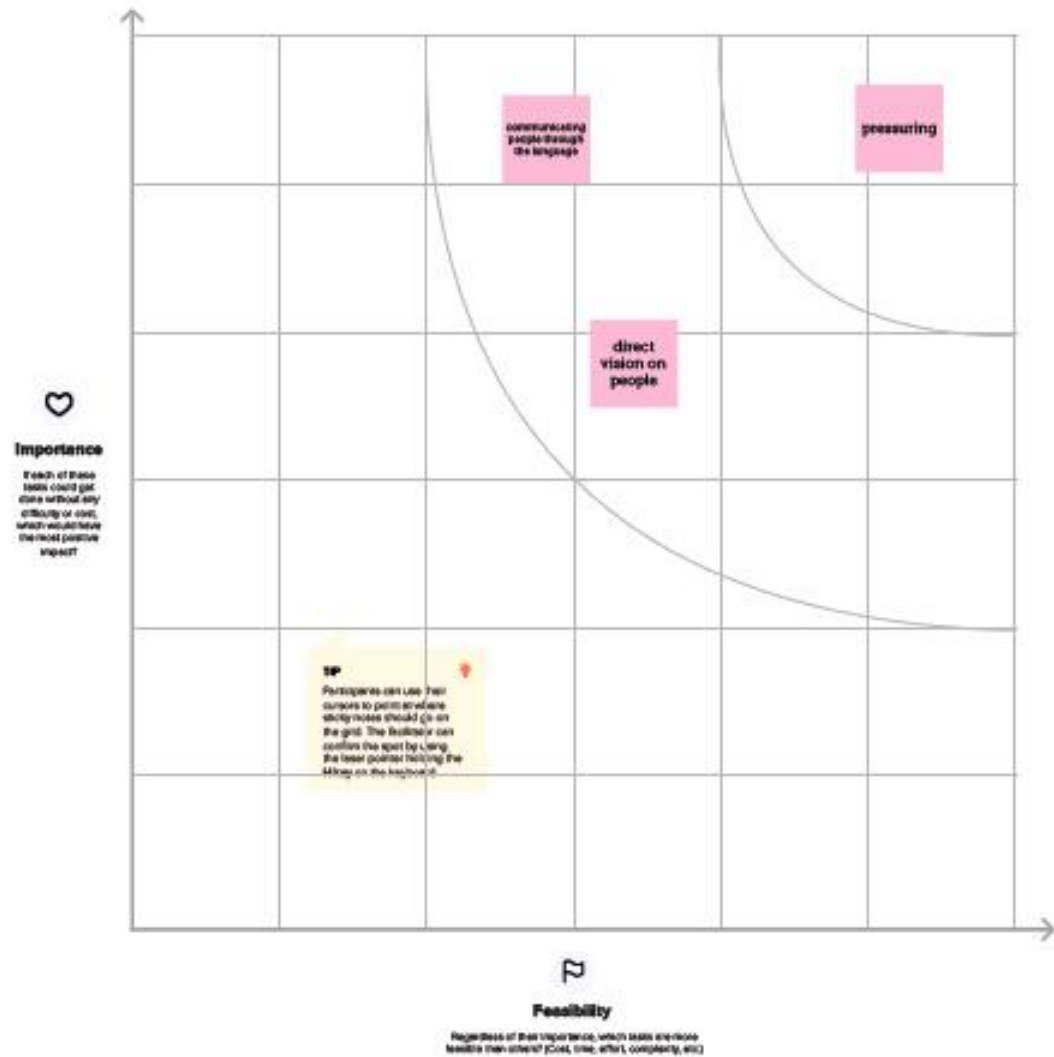
Add customizable tags to sticky notes to make it easier to browse, organize, and categorize important themes within your mind map.

4

Prioritize

Your team should all be on the same page about what's important moving forward. Place your ideas on this grid to determine which ideas are important and which are feasible.

⌚ 20 minutes

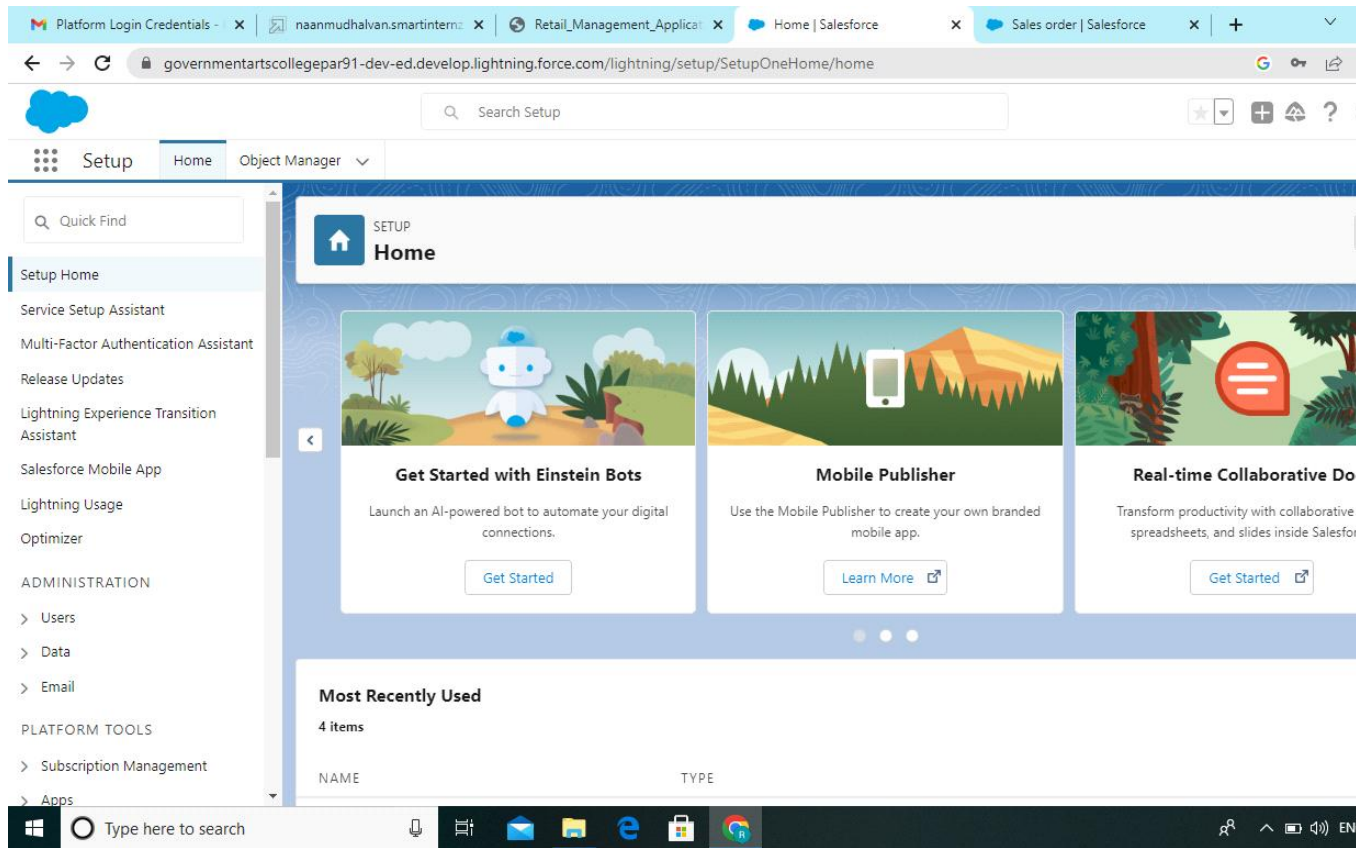


RESULT

Object Name	Fields in the Object	
Data type	Field label	Data type
	Dispatch/Trackings	Text
	Dispatched	Checkbox
Sales Order	Field label	Data type
	Sales Order	Master Detail Relationship
	Warehouse	Formula

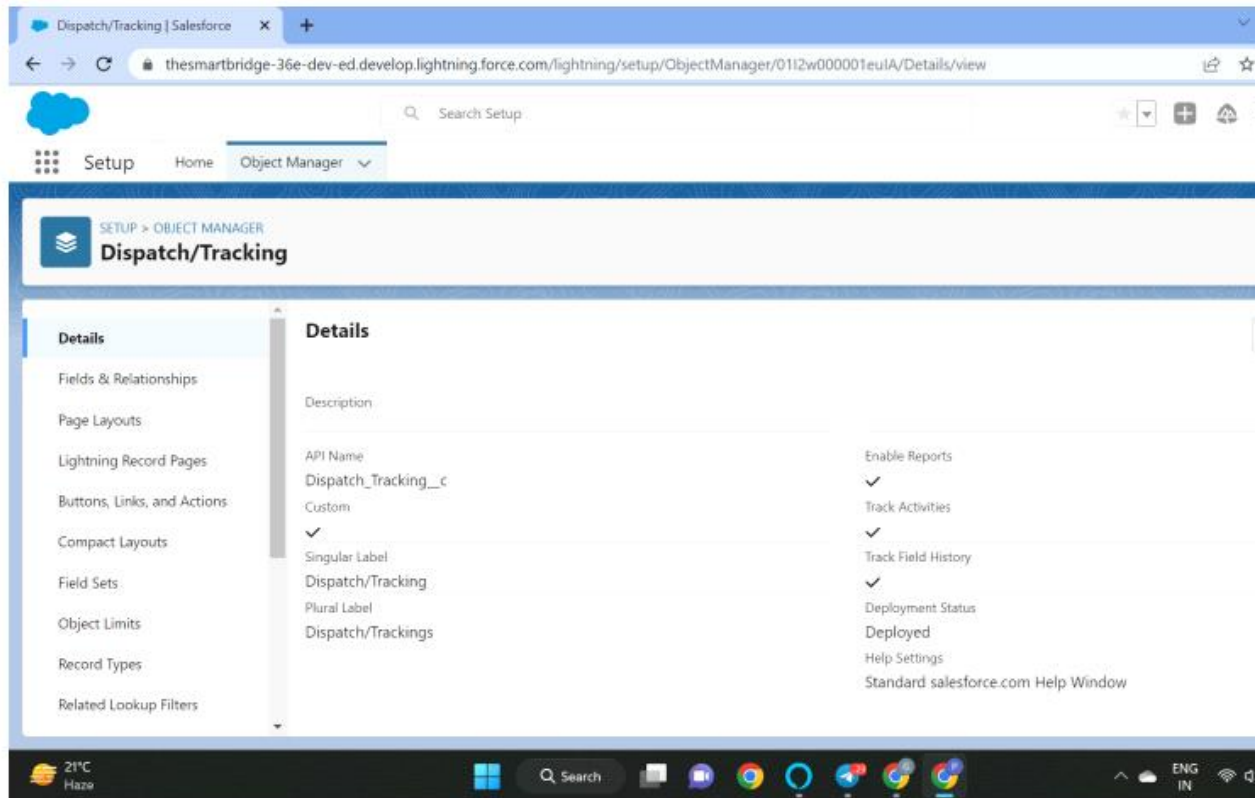
3.2 Activity & Screenshot

- Create a Salesforce Developer Org through the website developer .salesforce.com and the setup page appeared.




•Custom Object i.e, Dispatch/Trackings and sales order created.

Activity1: Object Dispatch/Tracking is created



Activity 2: Object Sales Order Created.



Search Setup

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Sales order

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Details

Description

API Name

Sales_order__c

Custom

✓

Singular Label

Sales order

Plural Label

Sales orders

Enable Reports

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

4.Lightning App was Created.

Platform Login | naanmudhalvan | Retail_Management | Home | Salesforce | warehouse | Sales | App Manager | Sales order | Sales

governmentartscollegepar91-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

Search Setup

Setup Home Object Manager

app

Salesforce Mobile App

Data

Mass Transfer Approval Requests

Apps

App Manager

AppExchange Marketplace

Connected Apps

Connected Apps OAuth Usage

Manage Connected Apps

Lightning Bolt

Flow Category

Lightning Bolt Solutions

Mobile Apps

Salesforce

Salesforce Branding

SETUP

Lightning Experience App Manager

New Lightning App New Co

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 Cloning. See additional details and terms in the [Winter '23 release notes](#)

Enable App Cloning ☐ Disabled

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

	App Name ↑	Developer Name	Description	Last Modified ...	Ap...	Vi
1	All Tabs	AllTabSet		12/04/2023, 2:33 pm	Classic	
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	12/04/2023, 2:33 pm	Classic	✓
3	App Launcher	AppLauncher	App Launcher tabs	12/04/2023, 2:33 pm	Classic	✓
4	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your in...	12/04/2023, 2:36 pm	Lightning	✓
5	Community	Community	Salesforce CRM Communities	12/04/2023, 2:33 pm	Classic	✓

Type here to search

4. Custom Object Tabs was created.

governmentartscollegepar91-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/home

Search Setup

Setup Home Object Manager

tab

User Interface

Loaded Console Tab Limit

Rename Tabs and Labels

Tabs

Didn't find what you're looking for?
Try using Global Search.







Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs

New What Is This?

Action	Label	Tab Style	Description
Edit Del	Dispatch/Trackings	 Bell	
Edit Del	parents	 Box	
Edit Del	Sales orders	 Fan	
Edit Del	students	 Car	
Edit Del	warehouses	 Bottle	
Edit Del	Warehousesess	 Cup	

Web Tabs

New What Is This?

5.Users was Created.

governmentartscollegepar91-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home

Search Setup

Setup Home Object Manager

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Didn't find what you're looking for? Try using Global Search.

Users

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

View: All Users Edit Create New View

A B C D E F G H I J K L M N O P Q R S T U V W

New User Reset Password(s) Add Multiple Users

Action	Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d5i00000cf17yead.2rwrkkggi4q@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	MK_Roopasri	RMK	roopasri@salesforce.qacpmk		✓	System Administrator
<input type="checkbox"/> Edit	User Integration	integ	integration@00d5i00000cf17yead.com		✓	Analytics Cloud Integration
<input type="checkbox"/> Edit	User Security	sec	insightssecurity@00d5i00000cf17yead.com		✓	Analytics Cloud Security

New User Reset Password(s) Add Multiple Users

A B C D E F G H I J K L M N O P Q R S T U V W

6.Validation Rules was created using Account Object.

Platform Login | naanmudhalvan | Retail_Managem | App Manager | parent | Salesforce | Object Manager | Users | Salesforce

governmentartscollegepar91-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/page?address=%2F03d5i000001L7jy

Search Setup

Setup Home Object Manager

Object Manager

Account Validation Rule

[Back to Account Validation Rules](#)

Validation Rule Detail Edit Clone

Rule Name	phone_number_has_international_format	Active	✓
Error Condition Formula	LEFT(Phone, 1) <> "+"	Error Location	Phone
Error Message	Phone number must begin with + (country code)		
Description			
Created By	Roopasri MK, 21/04/2023, 7:47 pm	Modified By	Roopasri MK, 21/04/2023, 7:47 pm

Edit Clone

Activity2: Cross Object was created using Contact Object.

Platform Login Creden x naanmudhalvan.smart x Retail_Management_A x Contact | Salesforce x Object Manager | Sale x Users | Salesforce x +

governmentartscollegepar91-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Contact/FieldsAndRelationships/new

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Contact

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Step 5. Add to page layouts

Previous Save & New

Field Label	Account Website
Data Type	Formula
Field Name	Account_Website
Description	

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select any page layouts.

To change the location of this field on the page, you will need to customize the page layout.

Add Field	Page Layout Name
<input checked="" type="checkbox"/>	Contact (Marketing) Layout
<input checked="" type="checkbox"/>	Contact (Sales) Layout
<input checked="" type="checkbox"/>	Contact (Support) Layout
<input checked="" type="checkbox"/>	Contact Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous Save & New

Type here to search

7. Report was created.

Retail Management

Search...

Sales App Accounts Campaigns Contacts Leads Opportunities Products Warehouses Sales Orders Reports

Reports

Recent

2 items

REPORTS

Recent

Created by Me

Private Reports

Public Reports

All Reports

FOLDERS

All Folders

Created by Me

Shared with Me

Report Name	Description	Folder	Created By	Created On	Subscribed
Products with stock availability		Public Reports	Phani Varma	1/12/2023, 9:30 PM	
Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	12/17/2022, 6:08 PM	

Activity2: Report type warehouse was created.

Retail Management

Search...

Sales App Accounts Campaigns Contacts Leads Opportunities Products Warehouses Report Builder

REPORT

Products with stock availability

Warehouses

Got Feedback?

Add Chart

Save & Run

Save

Close

Outline

Filters

Previewing a limited number of records. Run the report to see everything.

Update Preview Automatically

Product Name	Warehouse: Warehouse Name	Stock Available
- (2)	Passbook1	<input type="checkbox"/>
	Test Case-2	<input checked="" 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 ☒

Conditional

8. Dashboards was created.

Retail Management

Search...

★

+

🔔

?

⚙️

Sales App

Accounts

Campaigns

Contacts

Leads

Opportunities

Products

Warehouses

1

Dashboards

×

More

Dashboards

Recent

1 item

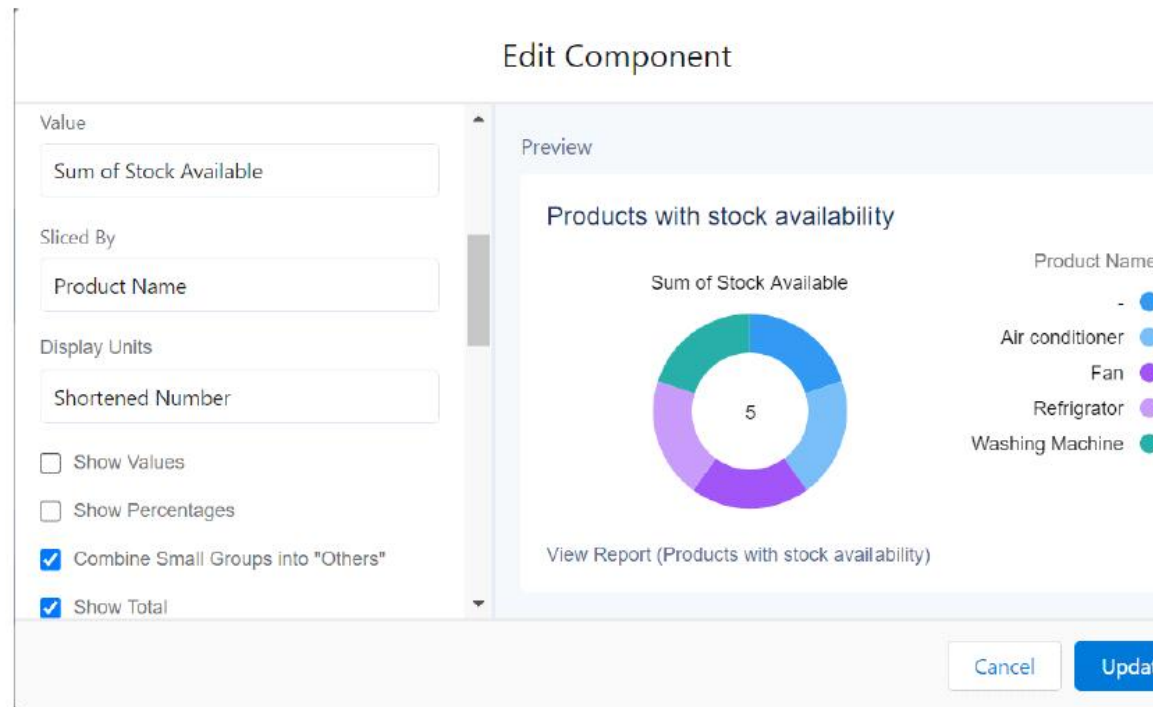
Search recent dashboards...

New Dashboard

New Folder

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Products with stock availability		Private Dashboards	Phani Varma	1/12/2023, 9:32 PM	
Created by Me						
Private Dashboards						
All Dashboards						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						

Activity 2: Product with stock availability dashboards are created.



- Trailhead Profile Public URL

Team Lead -

<https://trailblazer.me/id/sri1805>

Team Member 1 – <https://trailblazer.me/id/gprabha24>

Team Member 2 – <https://trailblazer.me/id/lavtn>

Team Member 3 – <https://trailblazer.me/id/susri40>

- ADVANTAGES & DISADVANTAGE

Advantages:

- Selling goods on credit.
- Helps customers to make purchase decision.
- Optimises all store processes.
- Simple Account Planning.
- To manage customer relationship, track inventory and automate sales processes.

Disadvantages:

1. Inadequate capital.
2. Lower Profit Margin.
3. No room for expansion due to lack of enough capital.
4. Inability to enjoy economics of scale.
5. Do not easily obtain loan.

- APPLICATIONS

1. Direct interaction with customers/end customers.
2. Sale volume large in quantities but less in monetary value

3. Customer service plays a vital role

'Retailing includes all the activities involved in selling goods or services to the final consumers for personal, non business uses. A process of promoting greater sales and customer satisfaction by gaining a better understanding of the consumers of goods and services produced by a company.

- CONCLUSION

The various processes which help the customers to procure the desired merchandise from the retail stores for their end use refer to retail management. Retail management includes all the steps required to bring the customers into the store and fulfil their buying needs. Retail management makes shopping a pleasurable experience and ensures the customers leave the store with a smile. In simpler words, retail management helps customers shop without any difficulty.

- FUTURE SCOPE

The retail sector in the country is currently booming, providing plenty of career prospects for people with a passion for sales marketplaces, business diversification, campaigning, advertising, market research, and segmentation. With the continuous expansion of the retail industry, there is a growing demand for retail courses that will prepare students to cope with the tactics, procedures, and methods that will help them generate more sales and customer satisfaction.