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.
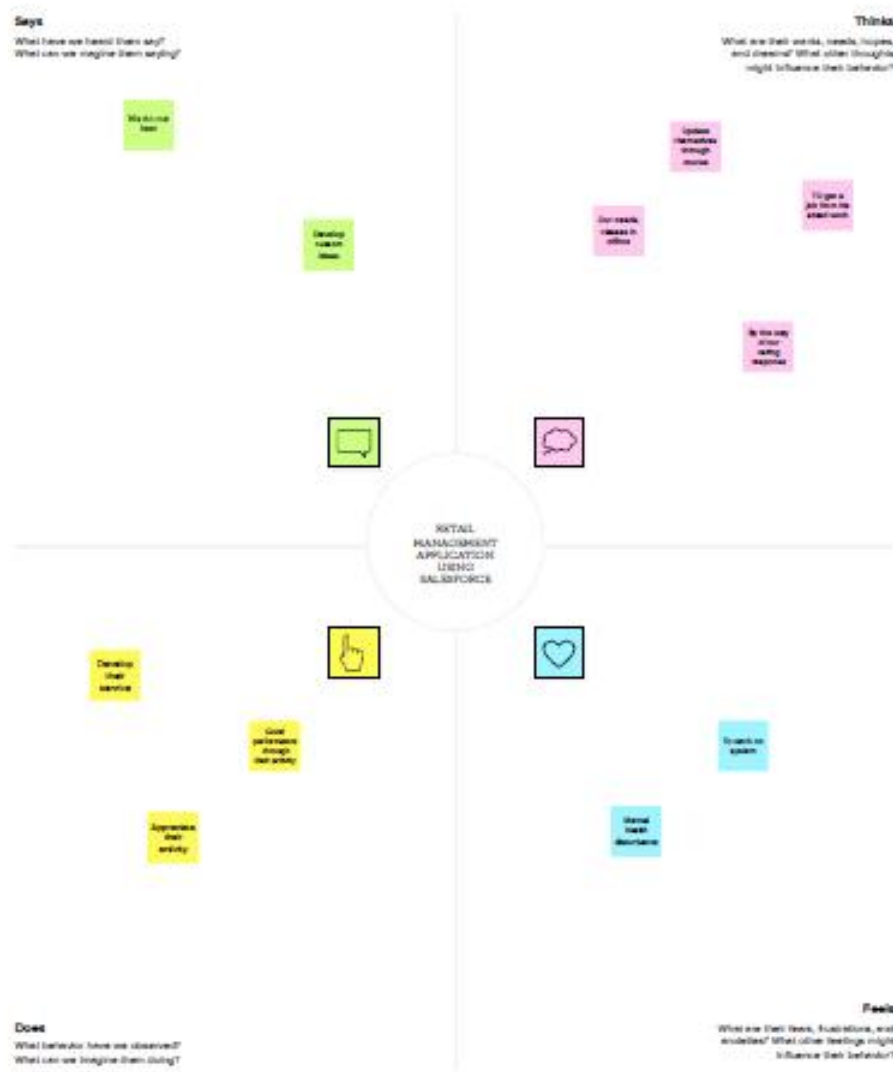
- Purpose

        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.

Says
What have we heard them say?
What can we imagine them saying?

Thinks
What are their worries, needs, hopes, and dreams? What other thoughts might influence their behavior?

RETAIL MANAGEMENT APPLICATION USING SALESFORCE

Does
What behavior have we observed?
What can we imagine them doing?

Feels
What are their fears, frustrations, and anxieties? What other feelings might influence their behavior?

- 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

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

[B] Set the goal
Think about the problem you'll be focusing on solving in
the brainstorming session.

[C] Learn how to use the facilitation tools
Use the Facilitation Superpowers to run a happy and
productive session.

Open article →

Person 1

Leading sales automation platform for retailers	It provides a comprehensive solution for managing sales processes and leads	Salesforce is the ultimate sales automation platform for retailers
This include customer service tools, market analysis tools	which makes it easier to identify and qualify potential customer	

Person 2

Division of a business responsibility of selling products	Linking between companies and customer	Improved Customer retention
Improved customer relationship management	Increased efficiency and automation of sales and marketing processes	

Person 3

Improved Inventory management and tracking	Analyze the customer behavior and purchase history	Integrating salesforce with other retail specific system and tools
provide customized products	Most common form of doing business	

Person 4

Retailer purchases good for merchandise	Direct interaction with customers' customers
customer service plays a vital role	Sales promotion are offered at this point on

Person 5

Retail outlets are more than any other form of business	Location and layout are critical factors in retail business	It offers employment opportunity to all age
Extended market penetration	Low capital and low risk	

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 and break it up into smaller sub-groups.

🕐 **20 minutes**

leading sales automation platform for retailers

Advantage to the franchiser

speeder expansion

Retail sector yet to recognised as an industry

high real estate costs

supply chain inefficiencies

TIP

Add customizable tag notes to make it easie browse, organize, and categorize important themes within your m

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

♡

Importance

If each of these
tasks could get
done without any
difficulty or cost,
which would have
the most positive
impact?

communicating
people through
the language

pressuring

direct
vision on
people

TIP

Participants can use their
cursors to point and see
sticky notes should go on
the grid. The facilitator can
confirm the spot by using
the laser pointer holding the
Alt key on the keyboard.

⚑

Feasibility

Regardless of their importance, which tasks are more
feasible than others? (Cost, time, effort, complexity, etc)

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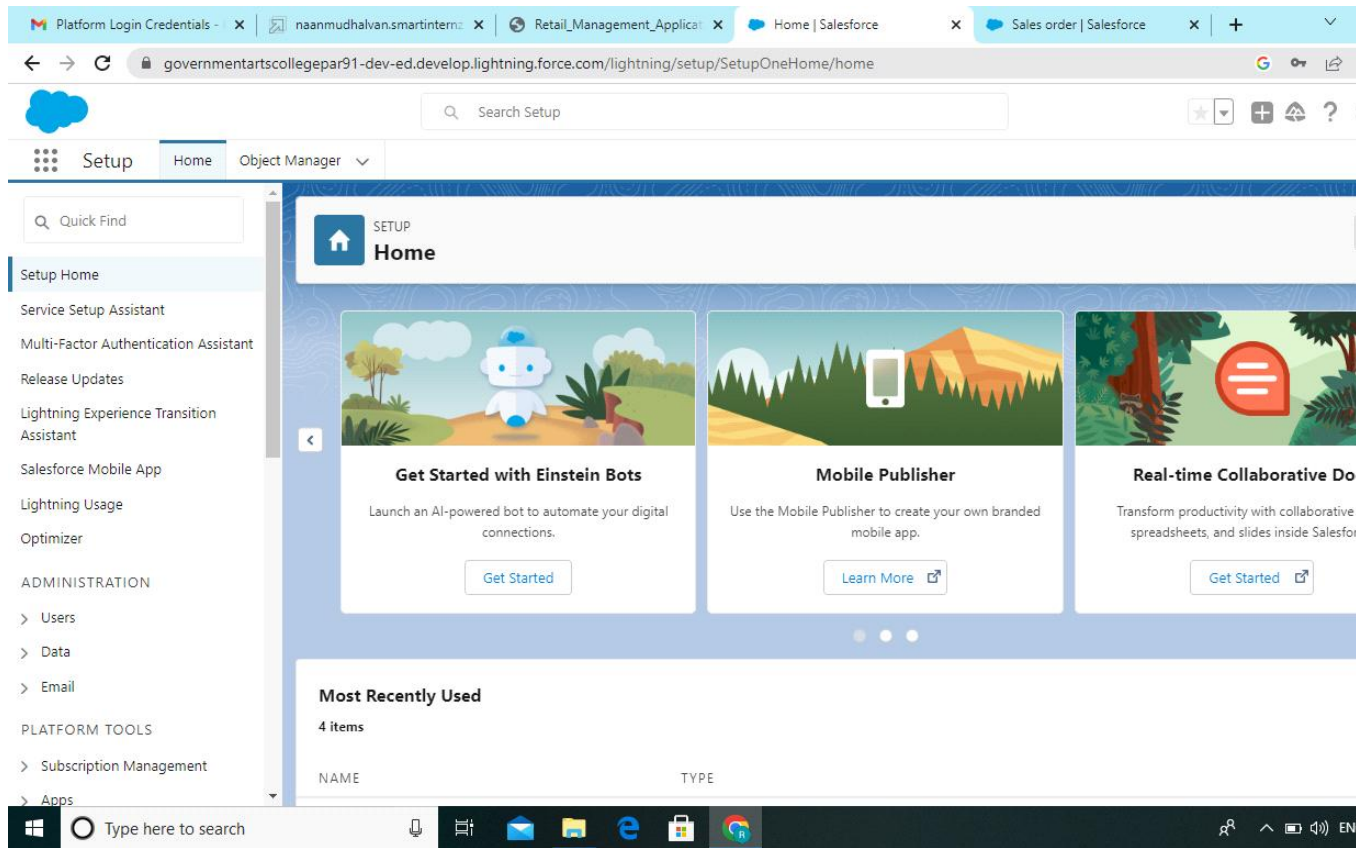
•**Custom Object i.e, Dispatch/Trackings and sales order created.**

Activity1: Object Dispatch/Tracking is created
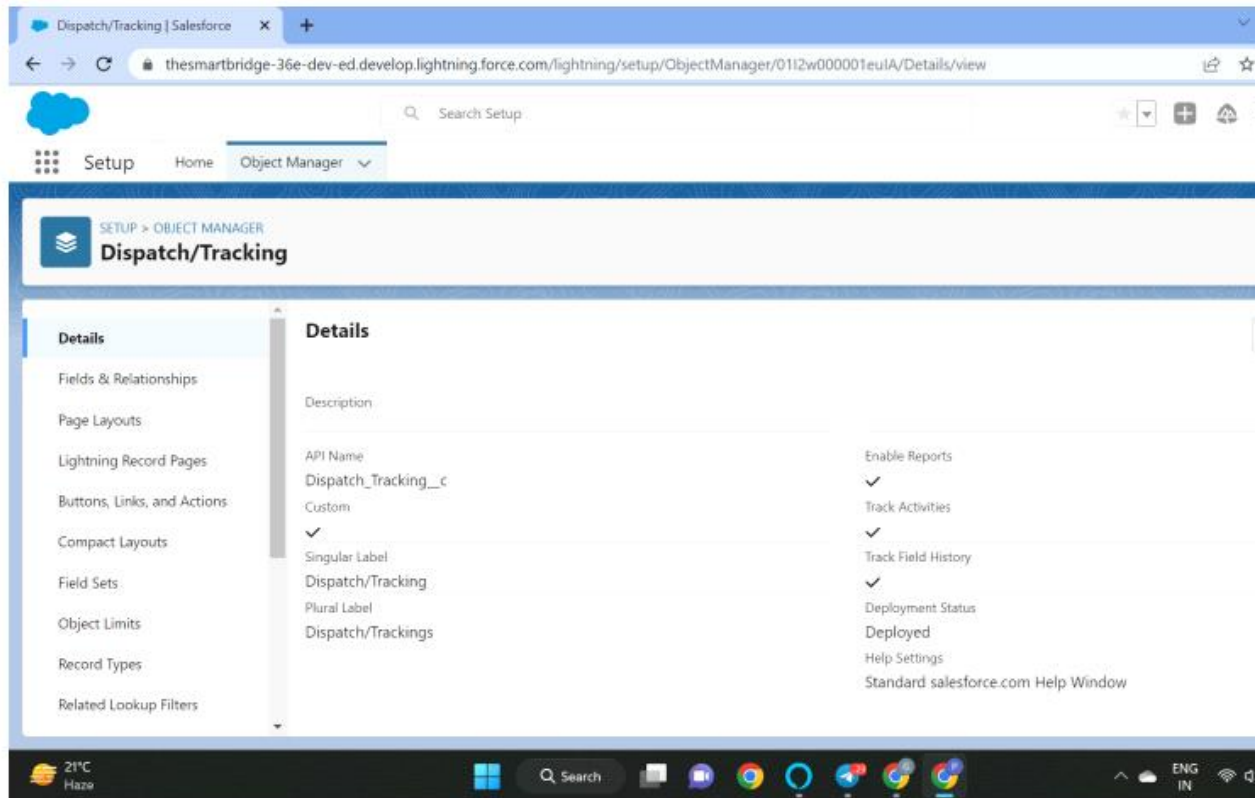
Activity 2: Object Sales Order Created.

4.Lightning App was Created.

4.Custom Object Tabs was created.

5.Users was Created.

6.Validation Rules was created using Account Object.

Activity2: Cross Object was created using Contact Object.

7. Report was created.

Activity2: Report type warehouse was created.

8. Dashboards was created.

Activity 2: Product with stock availability dashboards are created.
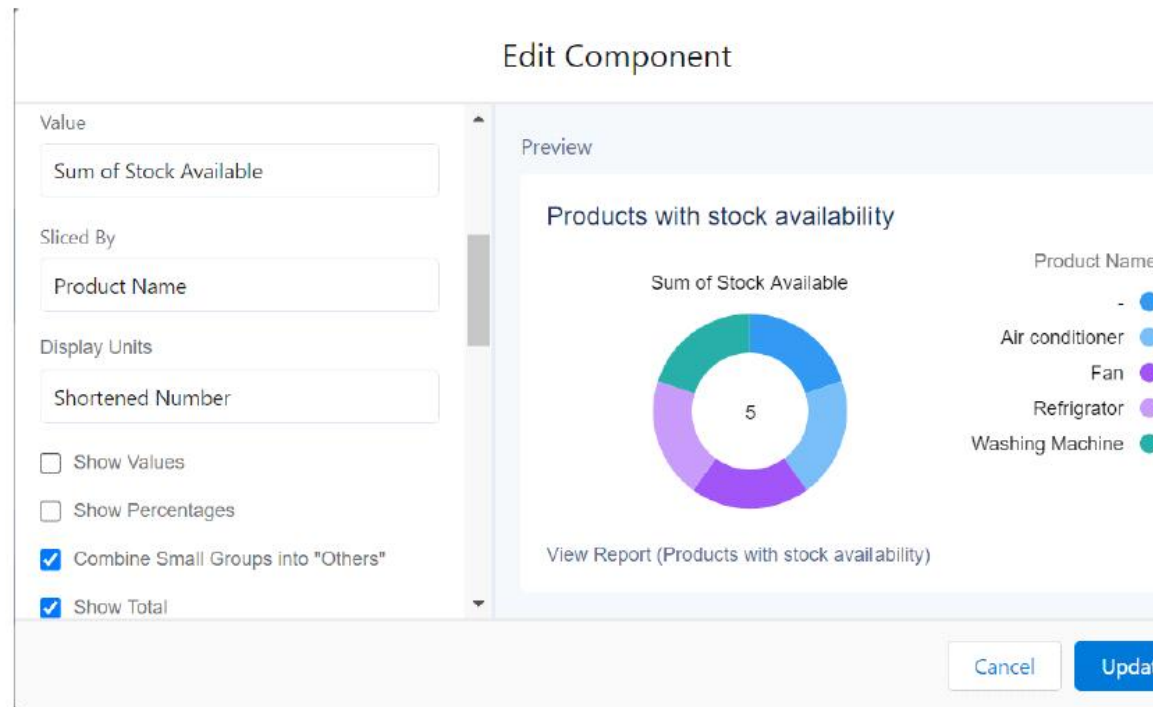
- Trailhead Profile Public URL

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.