

Retail management application using salesforce

1. Introduction

1.1 Overview

The project topic we are covering is “Retail management application using salesforce”. Retailing encompasses the business activities involved in selling goods and services to consumers for their personal, family, or households etc.,

1.2 Purpose

A CRM product owner has requested to create two applications, one is sales app for sales reps to use this application and store customers data, and the second is a service app for service reps/agents to provide support to customers in dealing cases. This can help field sales teams ensure that orders are fulfilled quickly and accurately and that inventory levels are maintained at optimal levels.

2. Problem Definition and Design Thinking

2.1 Empathy Map

Template

Empathy map

Use this framework to develop a deep, shared understanding and empathy for other people. An empathy map helps describe the aspects of a user's experience, needs and pain points, to quickly understand your users' experience and mindset.

[Share template feedback](#)

1

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 register them saying?

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

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

Feels
What are their joys, frustrations, and emotions? What other feelings might influence their behavior?

Central Circle: Our users are and a portrait to empathize with your users.

Quadrant Content:

- Says (Green boxes):**
 - DATE: 5/25/23
 - TEAM: UX
 - MODULUS: 10/20/2023
 - PROJECT NAME: Our Management app
 - Business: Retail
 - Customer Satisfaction
 - First app: Sales App
 - Second app: Service app
 - Retailing: Selling goods and services
- Thinks (Pink boxes):**
 - Stores, customers data
 - Customer support
 - Improved inventory
 - Increased efficiency
- Does (Yellow boxes):**
 - Lack of finding strategies
 - Optimising through dashboard
 - Increased Efficiency
 - Flexibility of payment
- Feels (Blue boxes):**
 - High Marketing Cost
 - Legal issues
 - Marketing strategy
 - Version of customer service

Need some inspiration?

Here is a finished version of this template to inspire your work.

[Open example](#)

2.2 Ideation and Brainstorming Map

Brainstorm & idea prioritization

Use this template in your own brainstorming sessions so your team can unleash their imagination and start shaping concepts even if you're not sitting in the same room.

15 minutes to prepare
1 hour to collaborate
3-8 people recommended

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.

15 minutes

1. Team gathering
Before you should participate in the session and start brainstorming, there should be a meeting to discuss the problem statement.

2. Set the goal
Think about the problem you'll be focusing on during the brainstorming session.

3. Learn how to use the facilitation tools
You need to understand the facilitation tools to use in the session to make it happy and productive.

Open choice

Define your problem statement

What problem are you trying to solve? Frame your problem as a how might we statement. This will be the focus of your brainstorm.

5 minutes

Example:
Date: 16.03.23 Team ID: NAG020WAG02028
Topic: Retail Management Application Using Signage
Using Signage

Key rules of brainstorming
To run an smooth and productive session

- Stay in topic
- Defers judgment
- Go for volume
- Encourage wild ideas
- Listen to others
- If possible, be visual

Brainstorm

Write down any ideas that come to mind that address your problem statement.

15 minutes

Person 1: Use Technology to expand our Retail Display
Person 2: Be Festive with app display
Person 3: using Signage and Displays
Person 4: Keep 'em Portable
Person 5: Customer Support

Tip: You can export a mind map to a PDF or PNG to share with members of your company who might find it helpful.

Group ideas

Now turn sharing your ideas into clusters of similar or related ideas 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

using signage and displays
Keep them portable
Be festive with app display
Customer support
Use Technology to extend our retail displays

Tip: Add color-coded tags to sticky notes to make it easier to find and group related ideas. Use the same color for all sticky notes in the same group.

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

Feasibility

Tip: Your team can use this grid to prioritize ideas and decide which ones to focus on. The grid is a 2x2 matrix with 'Importance' on the y-axis and 'Feasibility' on the x-axis. The ideas are placed in the grid as follows: 'Use Technology to expand our Retail Display' (top-left), 'Be Festive with app display' (top-right), 'Keep them portable' (top-right), 'Customer support' (bottom-left), 'using signage and displays' (bottom-left), and 'Use Technology to extend our retail displays' (bottom-right). A curved line separates the top-left and top-right ideas from the bottom-left and bottom-right ideas.

After you collaborate

You can export the mind as an image or pdf to share with members of your company who might find it helpful.

Quick add-ons

- Show the mind: Share a new link to the mind with collaborators to keep them in the loop about the outcomes of the session.
- Export the mind: Export a copy of the mind as a PNG or PDF to share to email, include in docs, or save to your drive.

Keep moving forward

- Strategic insights: Define the components of a new idea or strategy.
- Customer experience journey map: Understand customer needs, motivations, and obstacles for an experience.
- Strengths, weaknesses, opportunities & threats: Identify strengths, weaknesses, opportunities, and threats (SWOT) to develop a plan.

Show template feedback

RESULT:

Application	Fields in the object	
Sales app	Field label	Data type
	Warehouse	Check box
	Accounts	Check box
Services app	Field label	Data type
	Case	Master Detail Relationship
	Accounts	Master Detail Relationship

3.3 Activity and Screenshot

M1 :

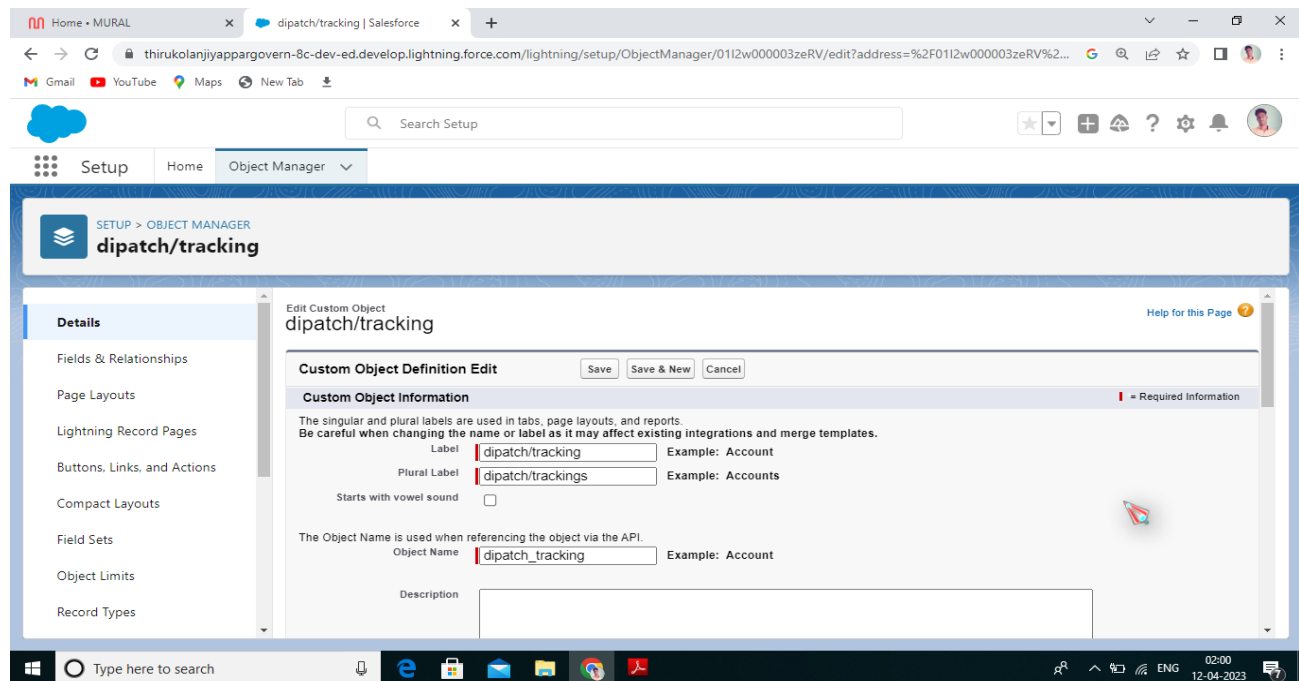
Activity :-

- Creating developer account
- Account Activation
- Salesforce login

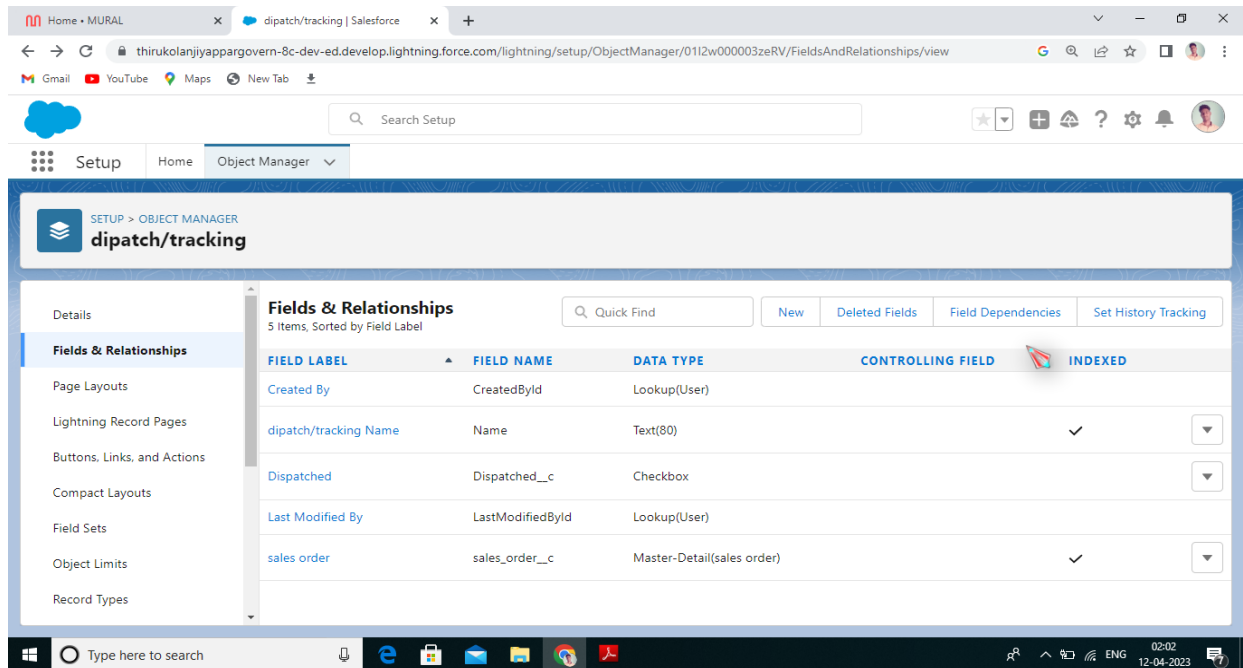
M2:

Activity 1:-

Creation of object Dispatch/Tracking



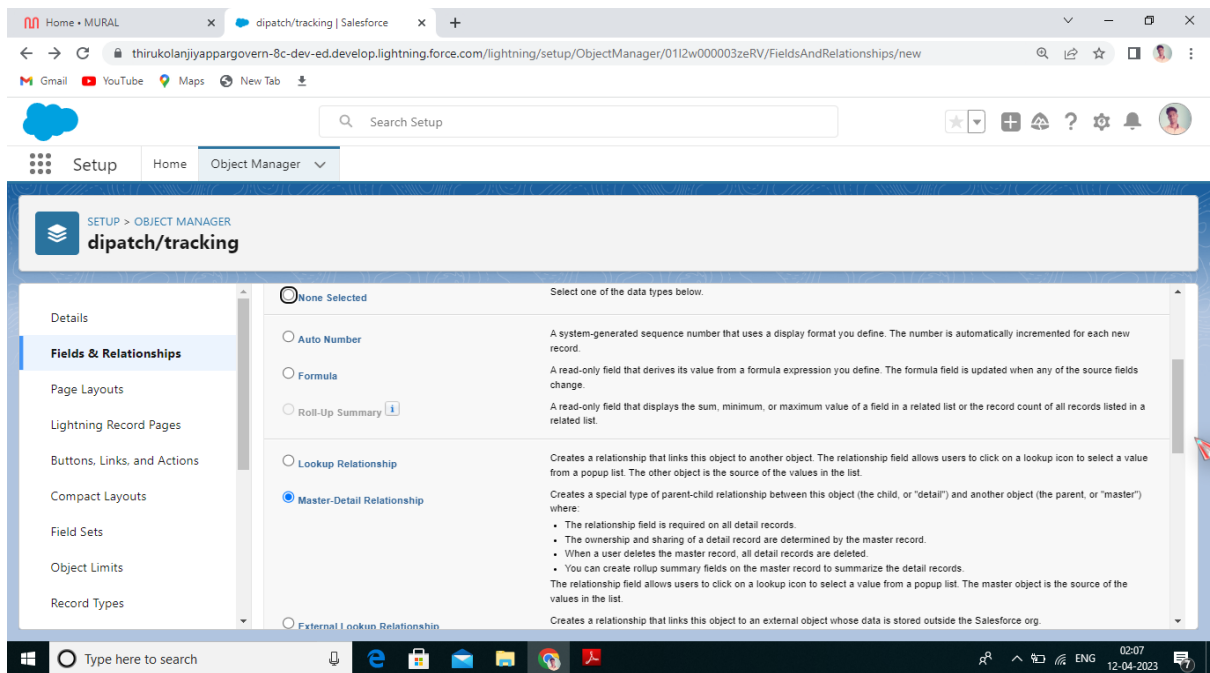
A2: Fields available on Dispatch/Tracking



The screenshot shows the Salesforce Setup interface for the 'dipatch/tracking' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, and Record Types. The main content area is titled 'Fields & Relationships' and shows a table of 5 items, sorted by Field Label. The table has columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: Created By (CreatedBy, Lookup(User)), dipatch/tracking Name (Name, Text(80)), Dispatched (Dispatched__c, Checkbox), Last Modified By (LastModifiedById, Lookup(User)), and sales order (sales_order__c, Master-Detail(sales order)).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
dipatch/tracking Name	Name	Text(80)		✓
Dispatched	Dispatched__c	Checkbox		
Last Modified By	LastModifiedById	Lookup(User)		
sales order	sales_order__c	Master-Detail(sales order)		✓

M3 A1: Relationship between objects

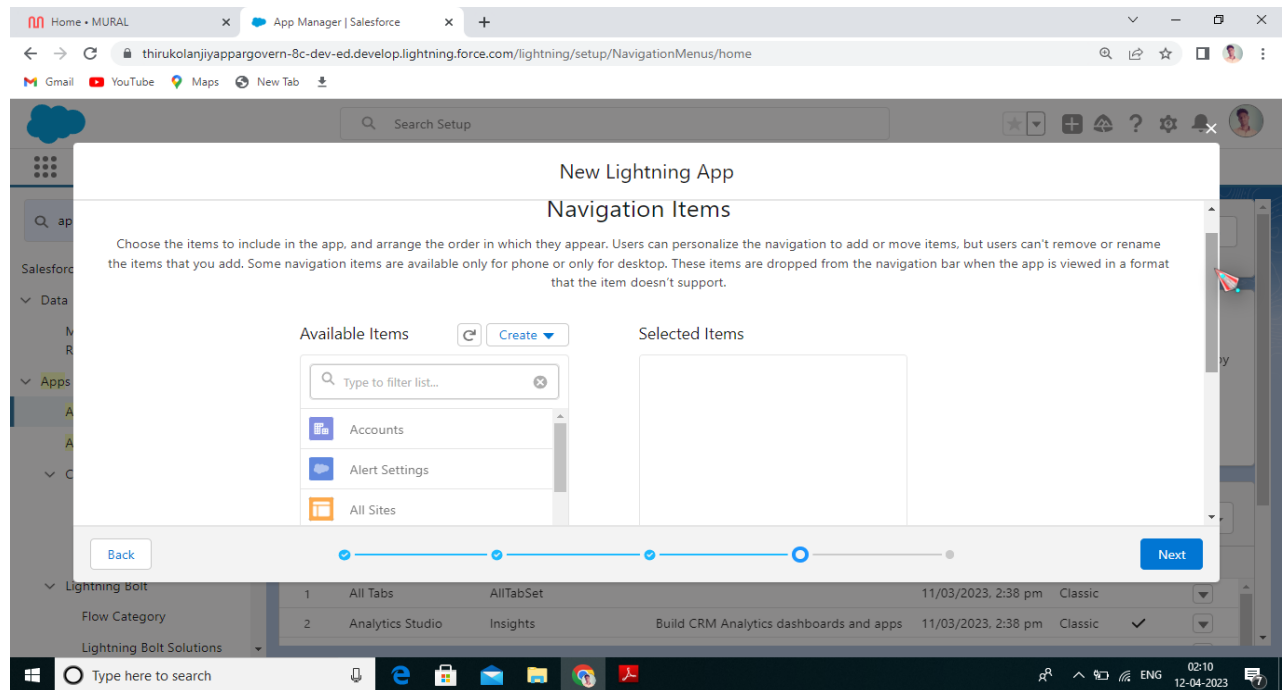


The screenshot shows the 'New Relationship' screen in Salesforce Setup for the 'dipatch/tracking' object. The left sidebar is the same as in the previous screenshot. The main content area is titled 'New Relationship' and shows a list of relationship types to select from. The options are: None Selected, Auto Number, Formula, Roll-Up Summary, Lookup Relationship, Master-Detail Relationship (selected), and External Lookup Relationship. Each option has a brief description of its functionality.

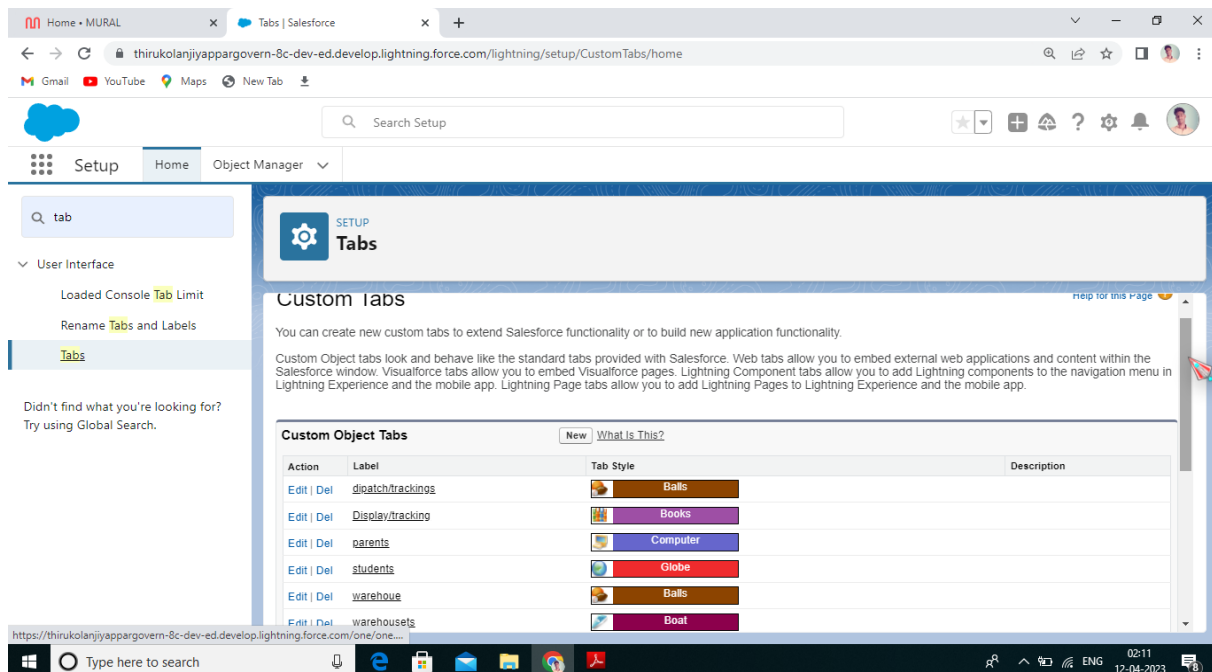
Select one of the data types below.

- ☐ None Selected
- ☐ Auto Number
 - A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
- ☐ Formula
 - A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
- ☐ Roll-Up Summary
 - A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
- ☐ Lookup Relationship
 - Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
- ☒ Master-Detail Relationship
 - Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
 - The relationship field is required on all detail records.
 - The ownership and sharing of a detail record are determined by the master record.
 - When a user deletes the master record, all detail records are deleted.
 - You can create rollup summary fields on the master record to summarize the detail records.
 - The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.
- ☐ External Lookup Relationship
 - Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

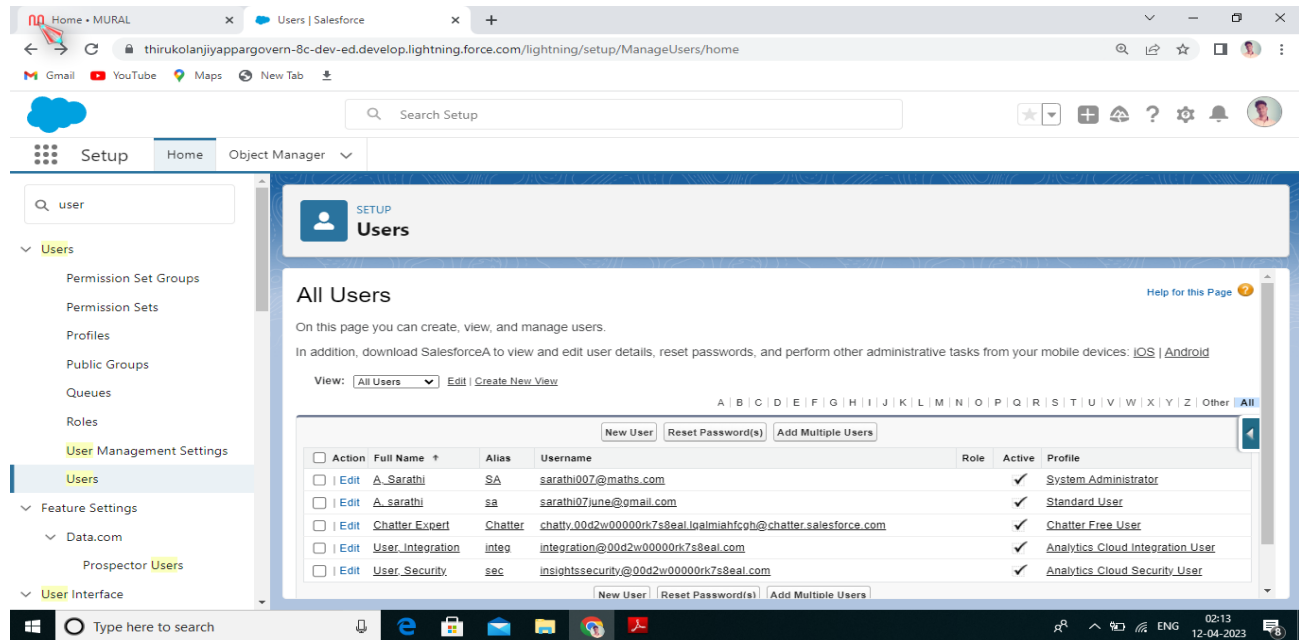
M4 A1: Creation of application



M5 A1: Creation of custom tabs



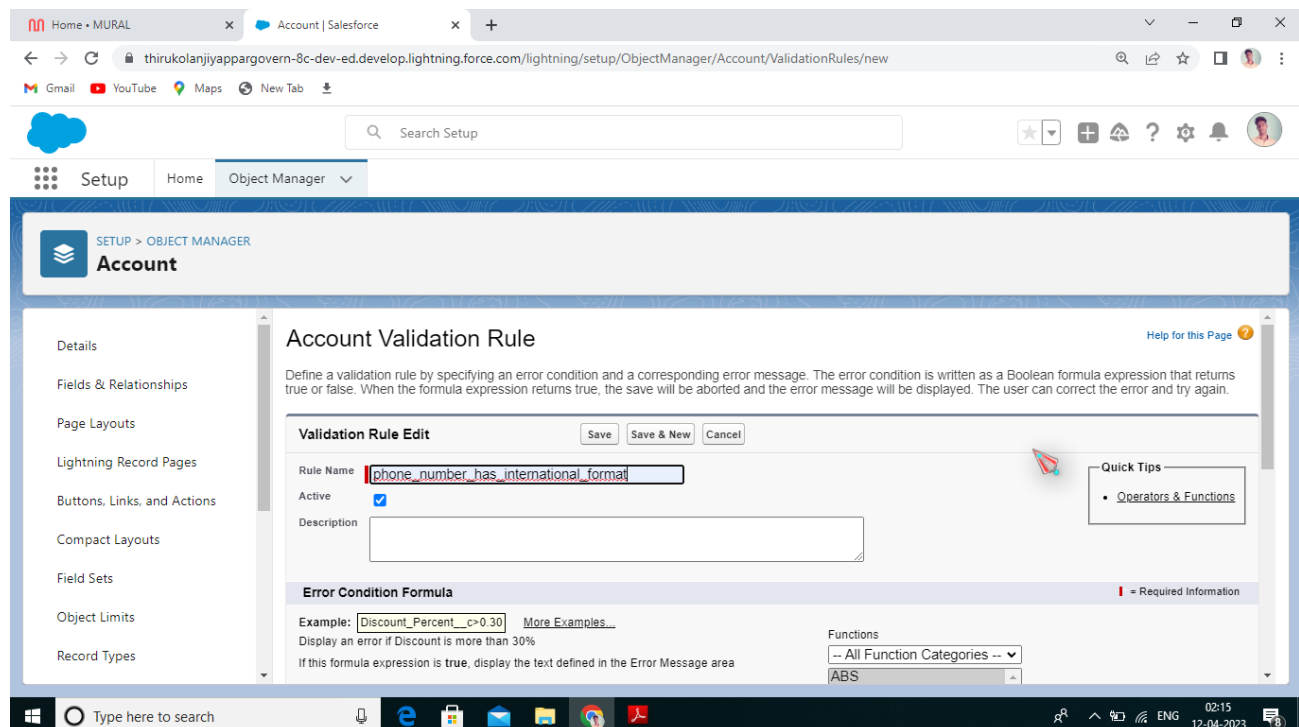
M6 A1 Creation of user



The screenshot shows the Salesforce Setup interface for the 'Users' section. The left sidebar contains a navigation menu with options like 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', 'Users', 'Feature Settings', 'Data.com', 'Prospector Users', and 'User Interface'. The main content area is titled 'All Users' and includes a search bar, a 'View' dropdown set to 'All Users', and a table of users. The table has columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The users listed are: System Administrator (A. Sarathi), Standard User (A. Sarathi), Chatter Free User (Chatter Expert), Analytics Cloud Integration User (User Integration), and Analytics Cloud Security User (User Security). The bottom of the screen shows the Windows taskbar with the search bar and various application icons.

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	A. Sarathi	SA	sarathi007@maths.com		✓	System Administrator
Edit	A. Sarathi	sa	sarathi07june@gmail.com		✓	Standard User
Edit	Chatter Expert	Chatter	chatty.00d2w00000rk7s8eal.0a1miiahfcpb@chatter.salesforce.com		✓	Chatter Free User
Edit	User Integration	integ	integration@00d2w00000rk7s8eal.com		✓	Analytics Cloud Integration User
Edit	User Security	sec	insightssecurity@00d2w00000rk7s8eal.com		✓	Analytics Cloud Security User

M7 A1: Creation of validation rules



The screenshot shows the Salesforce Setup interface for the 'Account Validation Rule' page. The left sidebar contains a navigation menu with options like 'Details', 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', and 'Record Types'. The main content area is titled 'Account Validation Rule' and includes a description of validation rules. The 'Validation Rule Edit' section shows the 'Rule Name' as 'phone_number_has_international_format', the 'Active' checkbox checked, and the 'Error Condition Formula' as 'Example: Discount_Percent__c>0.30'. The 'Functions' section shows 'ABS' selected. The bottom of the screen shows the Windows taskbar with the search bar and various application icons.

Validation Rule Edit

Rule Name:

Active: ☒

Description:

Error Condition Formula

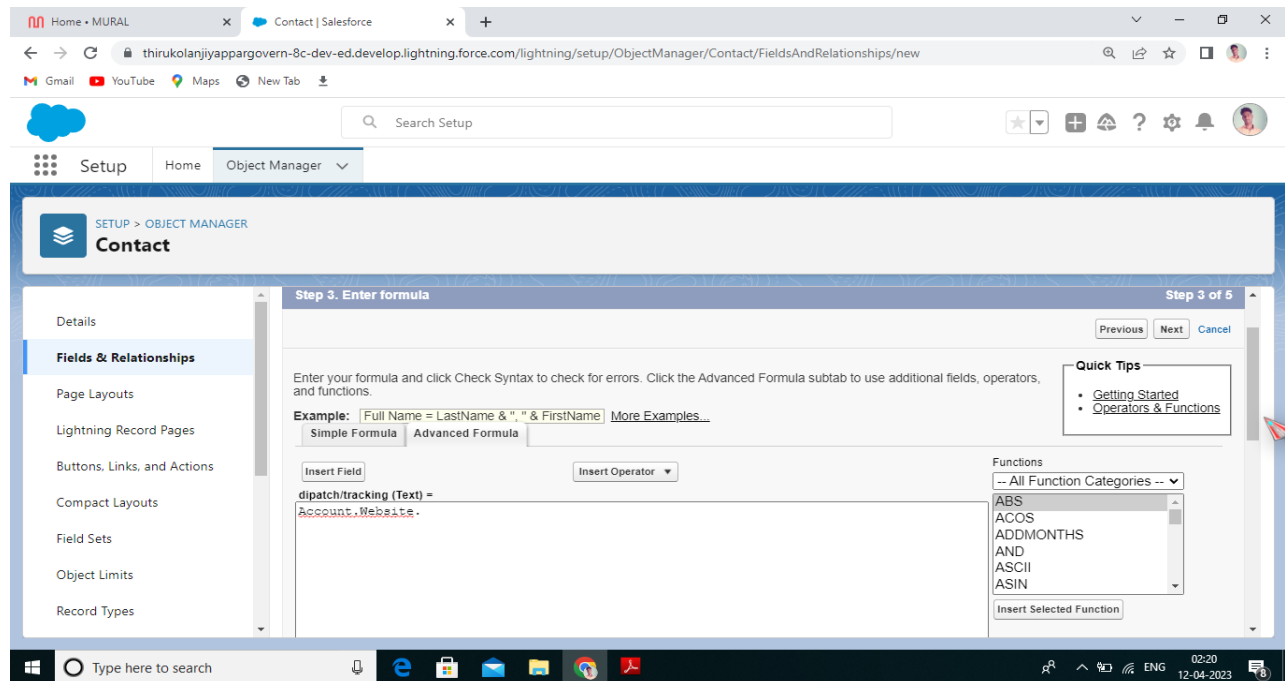
Example: `Discount_Percent__c>0.30` [More Examples...](#)

Display an error if Discount is more than 30%

If this formula expression is true, display the text defined in the Error Message area

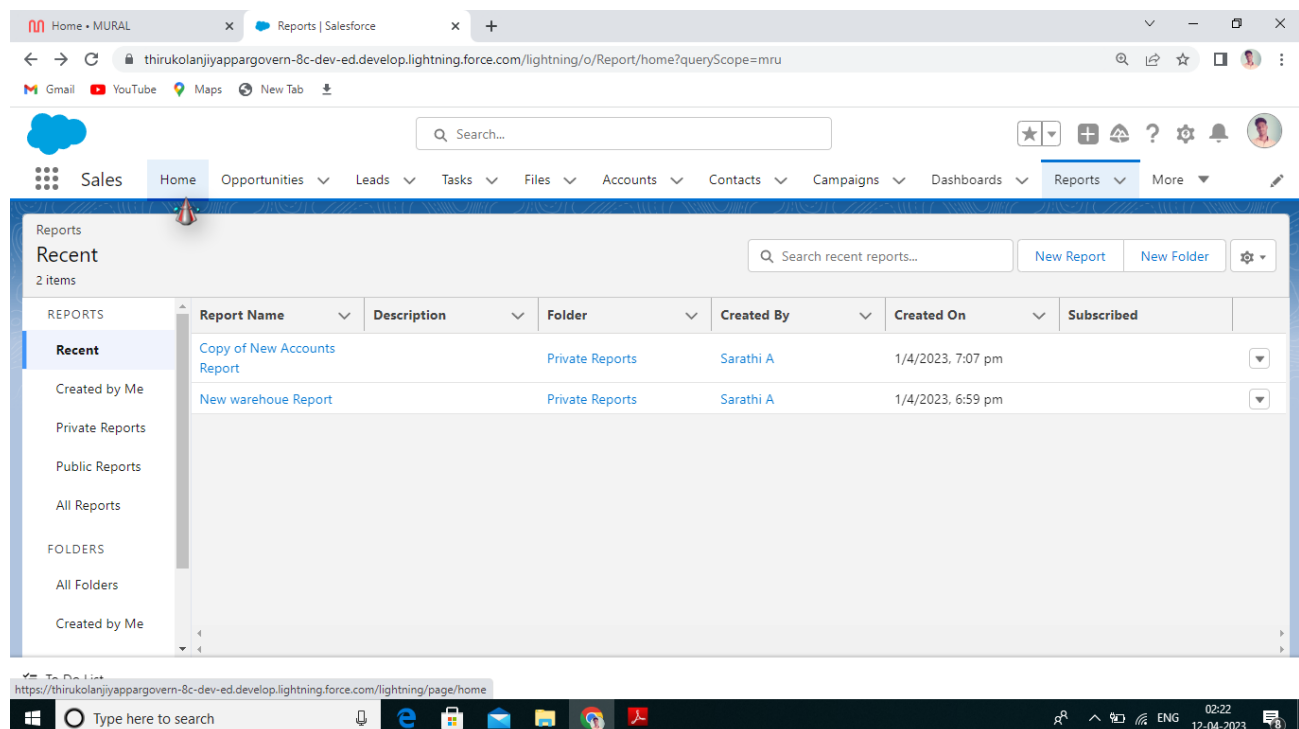
Functions:

M7 A2: Creation of cross-objects



The screenshot shows the Salesforce Setup interface for the 'Contact' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, and Record Types. The main content area is titled 'Step 3. Enter formula' and includes a 'Previous' button, a 'Next' button, and a 'Cancel' button. Below the title, there is a text area for entering the formula, with an example: 'Full Name = LastName & ", " & FirstName'. The 'Simple Formula' tab is selected. The formula being entered is 'dispatch/tracking (Text) = account.Warehouse'. To the right of the formula editor, there is a 'Functions' panel with a dropdown menu for 'All Function Categories' and a list of functions: ABS, ACOS, ADDMONTHS, AND, ASCII, and ASIN. A 'Quick Tips' panel is also visible on the right, with links to 'Getting Started' and 'Operators & Functions'.

M7 A1: Creation of reports



The screenshot shows the Salesforce Reports interface. The top navigation bar includes 'Sales', 'Home', 'Opportunities', 'Leads', 'Tasks', 'Files', 'Accounts', 'Contacts', 'Campaigns', 'Dashboards', 'Reports' (selected), and 'More'. The main content area is titled 'Recent' and shows a list of recent reports. The table has columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. The table contains two rows of data:

Report Name	Description	Folder	Created By	Created On	Subscribed
Copy of New Accounts Report		Private Reports	Sarathi A	1/4/2023, 7:07 pm	
New warehouse Report		Private Reports	Sarathi A	1/4/2023, 6:59 pm	

The left sidebar contains a navigation menu with options: Reports, Recent (selected), Created by Me, Private Reports, Public Reports, All Reports, FOLDERS, All Folders, and Created by Me. The bottom of the screen shows the Windows taskbar with the search bar and various application icons.

M7 A1: Creation of dashboard

The screenshot displays the Salesforce Dashboards interface. The browser address bar shows the URL: `thirukolanjiyappargovern-8c-dev-ed.develop.lightning.force.com/lightning/o/Dashboard/home?queryScope=mru`. The Salesforce navigation bar includes the 'Sales' logo and a menu with options: Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards (selected), Reports, and More. A search bar is located in the top right of the navigation bar.

The main content area is titled 'Dashboards' and shows a 'Recent' section with 1 item. A search bar for recent dashboards is present, along with 'New Dashboard' and 'New Folder' buttons. A table lists the dashboard details:

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	products with stock availability		Private Dashboards	Sarathi A	12/4/2023, 9:37 am	

The left sidebar contains a list of dashboard categories: 'Recent', 'Created by Me', 'Private Dashboards', and 'All Dashboards'. Below these are 'FOLDERS' with 'All Folders', 'Created by Me', and 'Shared with Me'. At the bottom of the screen, the Windows taskbar is visible, showing the search bar, task icons, and system tray with the time 09:37 and date 12-04-2023.

4. Trialhead profile public URL

Team Leader : SARANYA S

<https://trailblazer.me/id/saras332>

Team member : SARATHI A

<https://trailblazer.me/id/saraa103>

Team member : SOWMIYA A

<http://trailblazer.me/id/aarjun47>

Team member: SATHISHKUMAR A

<https://trailblazer.me/id/mrsaa2>

Team member : ROJA M

<https://trailblazer.me/id/roja27112002>

Team member : SATHIYARAJ T

<https://trailblazer.me/id/sath143>

5. Advantages

- High Marketing Cost
- Optimising through dashboard
- Stores customers data
- Improved inventory

Disadvantages

- High Marketing Cost
- Legal issues
- Intrusion of customer privacy
- Lack of inviting atmosphere

6. Application

- The mobile app allows your sales team to address customer needs quickly.
- It improves customer relationships.
- A mobile app boosts inventory.
- It provides instant access to product information.

7. Conclusion

Today, most of the traffic online is powered by mobile devices. Getting a mobile app for your business puts you in the right position to leverage this trend.

From the branding perspective to customer service and marketing, there are hardly any departments of your business that won't benefit from incorporating a mobile app.

8. Future Scope

One of the primary reasons why businesses need mobile applications is to improve sales. The technology provides a new medium to interact with prospective consumers, creating value in their daily life and possibly trying to make sales, The channel can be utilized to get other details of consumers which can help in improving marketing strategies.