

RETAIL MANAGEMENT(SALES APP)

1.INTRODUCTION:

1.1.OVERVIEW:-

A sales app is a software application designed to help sales teams manage their tasks and workflows more efficiently. Sales apps are typically used by sales reps, managers, and other professionals involved in the sales process.

A sales app is a software application designed to help sales teams manage their tasks and workflows more efficiently. Sales apps are typically used by sales reps, managers, and other professionals involved in the sales process.

Some of the key features of a sales app may include accounts management, contacts management, products, warehouses, sales order, sales analytics, sales reporting, dispatch/trackings, opportunities, lead, campaign and collaboration tools.

Sales apps may be web-based, mobile, or desktop-based, and they may integrate with other sales.

The goal of a sales app is to streamline the sales process, improve productivity and efficiency, and ultimately increase revenue and profitability for the company. By providing sales reps with the tools they need to manage their work effectively, a sales app can help teams close more deals and achieve their sales targets.

1.2.PURPOSE:-

A sales app serves the purpose of helping businesses manage their sales process more efficiently and effectively. The app can be used by sales teams to track leads, manage customer relationships, and streamline the sales process.

Some common features of a sales app include reporting and analytics, and integration with other sales and marketing tools.

Overall, a sales app can help businesses increase their sales productivity, improve their sales forecasting, and provide a better customer experience.

2.PROBLEM DEFINITION & 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.

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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 imagine 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?



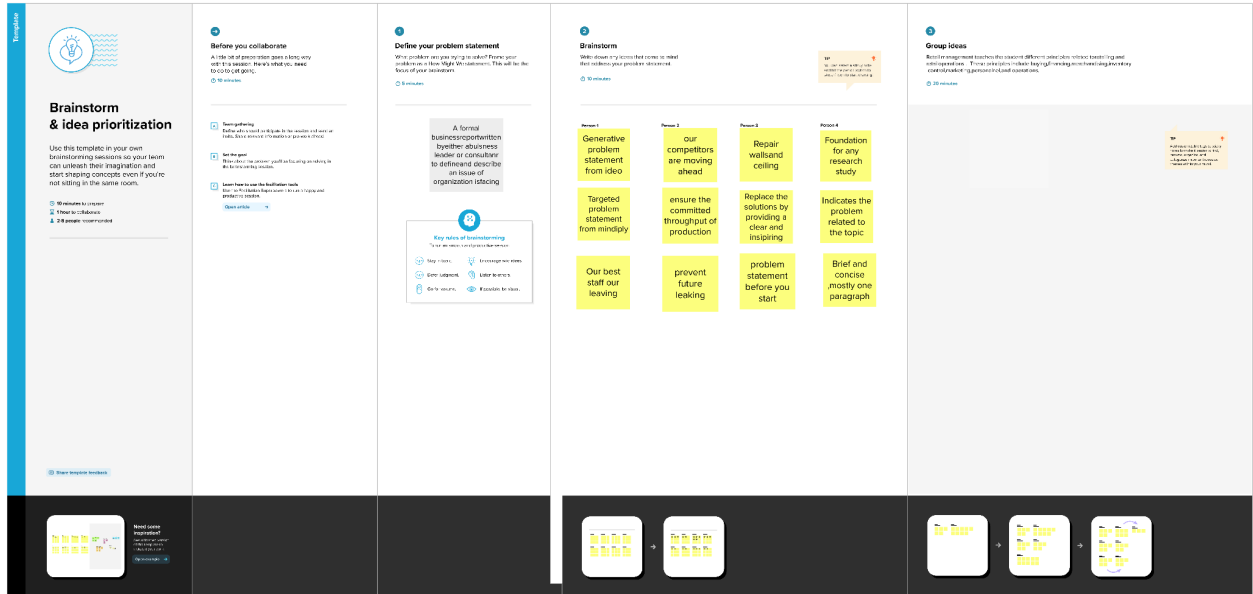
Feels

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


→

→

→


2.2.IDEATION & BRAINSTORMING MAP:-



3.RESULT:

DATA MODEL:-

S.no	Object name	Fields in the object	
1.	Accounts	Field label	Data type
		Account name	Text
		Address	Text
		Email	Email
		Gender	Picklist
		Phone	Phone
		Another Mobile	Text
		Pin code	Text
2.	Contacts	Field label	Data type
		Account name	Text

		<table><tr><td>Address</td><td>Text</td></tr><tr><td>Phone</td><td>Text</td></tr><tr><td>Email</td><td>Email</td></tr><tr><td>Another mobile</td><td>Text</td></tr></table>	Address	Text	Phone	Text	Email	Email	Another mobile	Text																
Address	Text																									
Phone	Text																									
Email	Email																									
Another mobile	Text																									
3.	Products	<table><tr><th>Field label</th><th>Data type</th></tr><tr><td>Product name</td><td>Text</td></tr><tr><td>No</td><td>Auto number</td></tr><tr><td>Price</td><td>Currency</td></tr></table>	Field label	Data type	Product name	Text	No	Auto number	Price	Currency																
Field label	Data type																									
Product name	Text																									
No	Auto number																									
Price	Currency																									
4.	Sales Order	<table><tr><th>Field label</th><th>Data type</th></tr><tr><td>No</td><td>Text</td></tr><tr><td>Tracking id</td><td>Text</td></tr><tr><td>Customer name</td><td>Text</td></tr><tr><td>Product name</td><td>Text</td></tr><tr><td>Quantity</td><td>Number</td></tr><tr><td>Amount</td><td>Currency</td></tr><tr><td>Expected date of delivery</td><td>Date</td></tr><tr><td>Phone</td><td>Phone</td></tr><tr><td>Another Phone</td><td>Phone</td></tr><tr><td>Delivery Address</td><td>Text</td></tr><tr><td>Pincode</td><td>Text</td></tr></table>	Field label	Data type	No	Text	Tracking id	Text	Customer name	Text	Product name	Text	Quantity	Number	Amount	Currency	Expected date of delivery	Date	Phone	Phone	Another Phone	Phone	Delivery Address	Text	Pincode	Text
Field label	Data type																									
No	Text																									
Tracking id	Text																									
Customer name	Text																									
Product name	Text																									
Quantity	Number																									
Amount	Currency																									
Expected date of delivery	Date																									
Phone	Phone																									
Another Phone	Phone																									
Delivery Address	Text																									
Pincode	Text																									

5.	Dispatch/Tracking		
		Field label	Data type
		Tracking id	Text
		Sales order	Master-Detail
		Expected date of delivery	Date
		Dispatched	Checkbox
6.	Warehouse		
		Field label	Data type
		Warehouse no	Text
		Warehouse name	Text
		Product name	Text
		Stocks Available	Checkbox
		Product count	Number
7.	Opportunities		
		Field label	Data type
		Opportunity name	Text
		Probability	Text
		Quantity	Number
		Deal close date	Date
		Competition	Text

8.	Leads	<table><tr><th>Field label</th><th>Data type</th></tr><tr><td>Leads name</td><td>Text</td></tr><tr><td>Lead source</td><td>Text</td></tr><tr><td>Lead status</td><td>Text</td></tr><tr><td>Lead score</td><td>Text</td></tr></table>		Field label	Data type	Leads name	Text	Lead source	Text	Lead status	Text	Lead score	Text		
		Field label	Data type												
		Leads name	Text												
		Lead source	Text												
		Lead status	Text												
		Lead score	Text												
9.	Campaign	<table><tr><th>Field label</th><th>Data type</th></tr><tr><td>Campaign name</td><td>Text</td></tr><tr><td>Campaign type</td><td>Text</td></tr><tr><td>Campaign start date</td><td>Date</td></tr><tr><td>Campaign end date</td><td>Date</td></tr><tr><td>Campaign status</td><td>Text</td></tr></table>		Field label	Data type	Campaign name	Text	Campaign type	Text	Campaign start date	Date	Campaign end date	Date	Campaign status	Text
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		Campaign name	Text												
		Campaign type	Text												
		Campaign start date	Date												
		Campaign end date	Date												
Campaign status	Text														

3.2 ACTIVITY & SCREENSHOT :

1.ACCOUNTS:-

Untitled mural - retail managem... x OAuth Error | Salesforce x Troubleshoot and Solve Problem x Accounts | Salesforce x +

shannugatech2-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/015i000001rBmr/Details/view

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Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Accounts

Details

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets

Description
We Capture Customers Data

API Name
Accounts__c

Custom
✓

Singular Label
Accounts

Plural Label
Accounts

Enable Reports
✓

Track Activities
✓

Track Field History
✓

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

2.CONTACTS:-

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Gmail YouTube Maps

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Contacts

Details

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types

Description
Employees data of customer

API Name
Contacts__c

Custom
✓

Singular Label
Contacts

Plural Label
Contacts

Enable Reports
✓

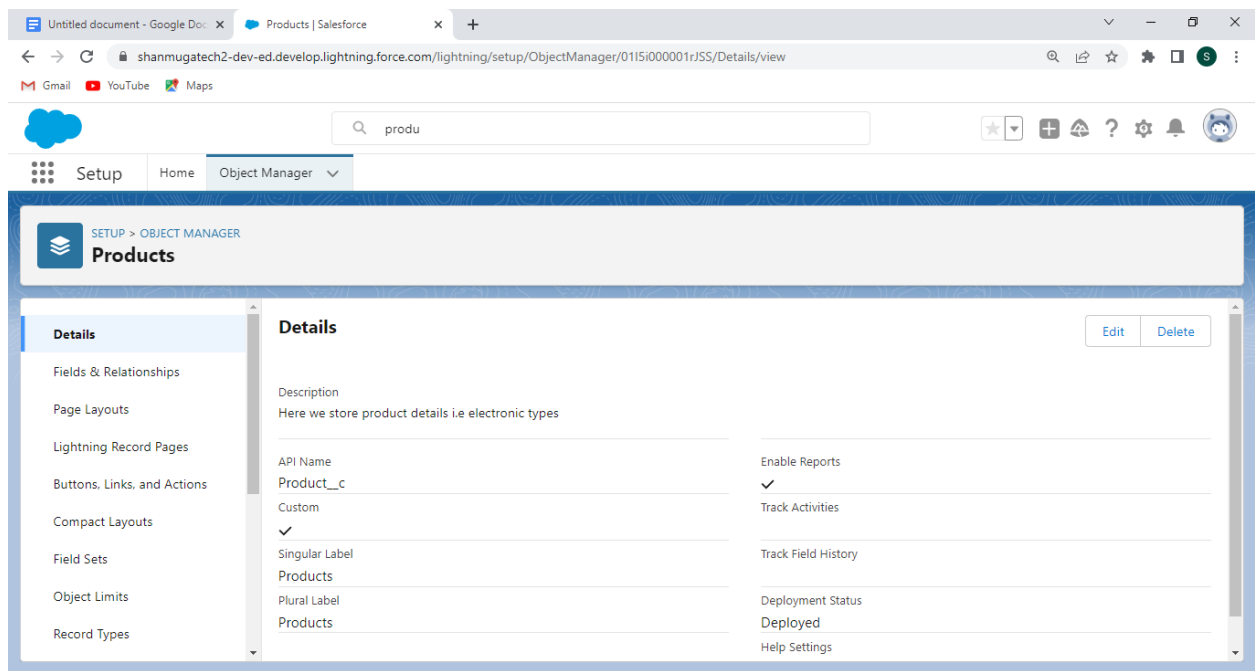
Track Activities

Track Field History

Deployment Status
Deployed

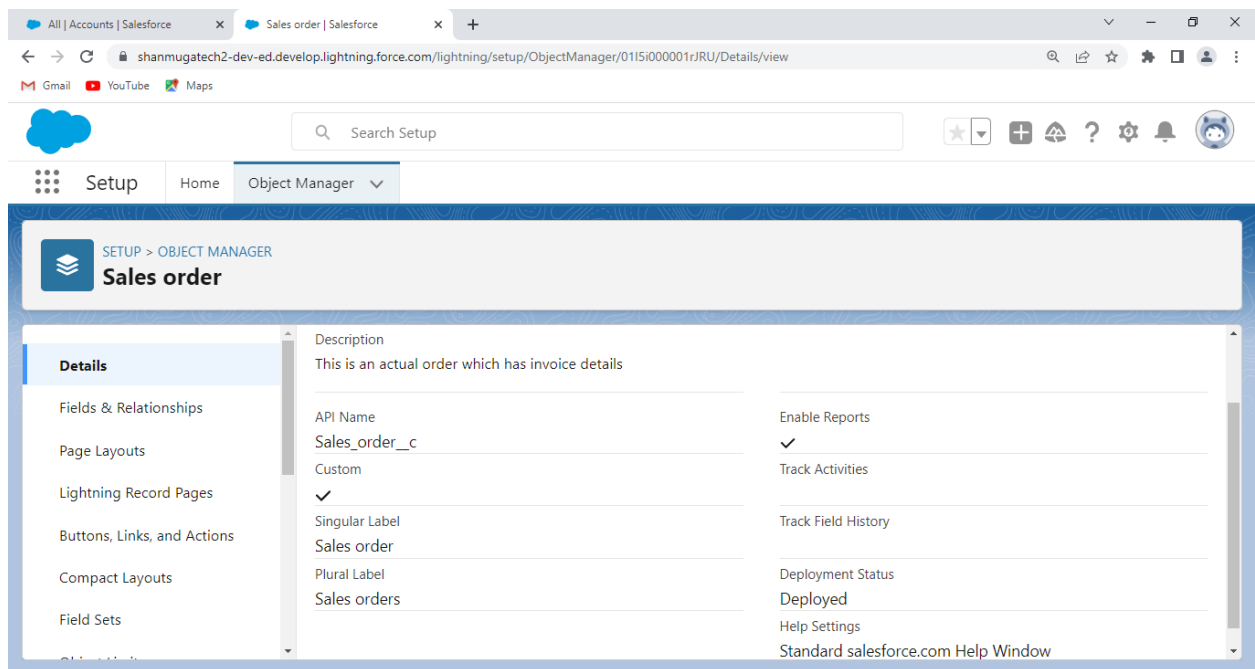
Help Settings
Standard salesforce.com Help Window

3.PRODUCTS:-



The screenshot shows the Salesforce Setup interface for the 'Products' object. The browser address bar displays the URL: shanmugatech2-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115i000001rJSS/Details/view. The page title is 'Products' under the 'Object Manager' section. The left sidebar contains a navigation menu with options: 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 'Details' and includes an 'Edit' button and a 'Delete' button. The 'Description' field contains the text: 'Here we store product details i.e electronic types'. The 'API Name' field is 'Product__c'. The 'Custom' checkbox is checked. The 'Singular Label' is 'Products' and the 'Plural Label' is 'Products'. The 'Enable Reports' checkbox is checked. The 'Track Activities' checkbox is checked. The 'Track Field History' checkbox is checked. The 'Deployment Status' is 'Deployed'. The 'Help Settings' link is visible.

4.SALES ORDER:-



The screenshot shows the Salesforce Setup interface for the 'Sales order' object. The browser address bar displays the URL: shanmugatech2-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115i000001rRU/Details/view. The page title is 'Sales order' under the 'Object Manager' section. The left sidebar contains a navigation menu with options: 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 'Details' and includes an 'Edit' button and a 'Delete' button. The 'Description' field contains the text: 'This is an actual order which has invoice details'. The 'API Name' field is 'Sales_order__c'. The 'Custom' checkbox is checked. The 'Singular Label' is 'Sales order' and the 'Plural Label' is 'Sales orders'. The 'Enable Reports' checkbox is checked. The 'Track Activities' checkbox is checked. The 'Track Field History' checkbox is checked. The 'Deployment Status' is 'Deployed'. The 'Help Settings' link is visible. The footer text 'Standard salesforce.com Help Window' is present.

5.DISPATCH/TRACKING:-

The screenshot shows the Salesforce Setup interface for the 'Dispatch/Tracking' object. The browser address bar indicates the URL: `shanmugatech2-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115i000001rHBo/Details/view`. The page title is 'Dispatch/Tracking'. The left sidebar contains a navigation menu with the following items: 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 displays the following details:

Field	Value
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

6.WAREHOUSE:-

The screenshot shows the Salesforce Setup interface for the 'Warehouse' object. The browser address bar indicates the URL: `shanmugatech2-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115i000001rJ8y/Details/view`. The page title is 'Warehouse'. The left sidebar contains a navigation menu with the following items: 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 displays the following details:

Field	Value
Description	We capture stocks data
API Name	Warehouse__c
Custom	✓
Singular Label	Warehouse
Plural Label	Warehouses
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

7.OPPORTUNITIES:-

Google Docs: Online Document | x Google Docs x RETAIL MANAGEMENT(SALES AP x Opportunities | Salesforce x +

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oppo

Setup Home Object Manager

SETUP > OBJECT MANAGER

Opportunities

Details Edit Delete

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Description
SMB sales orders data

API Name
Opportunities__c

Custom
✓

Singular Label
Opportunities

Plural Label
Opportunities

Enable Reports
✓

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings

8.LEADS:-

Google Docs: Online Document | x Google Docs x RETAIL MANAGEMENT(SALES AP x Leads | Salesforce x +

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Gmail YouTube Maps

leads

Setup Home Object Manager

SETUP > OBJECT MANAGER

Leads

Details Edit Delete

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Description
We capture leads here

API Name
Leads__c

Custom
✓

Singular Label
Leads

Plural Label
Leads

Enable Reports
✓

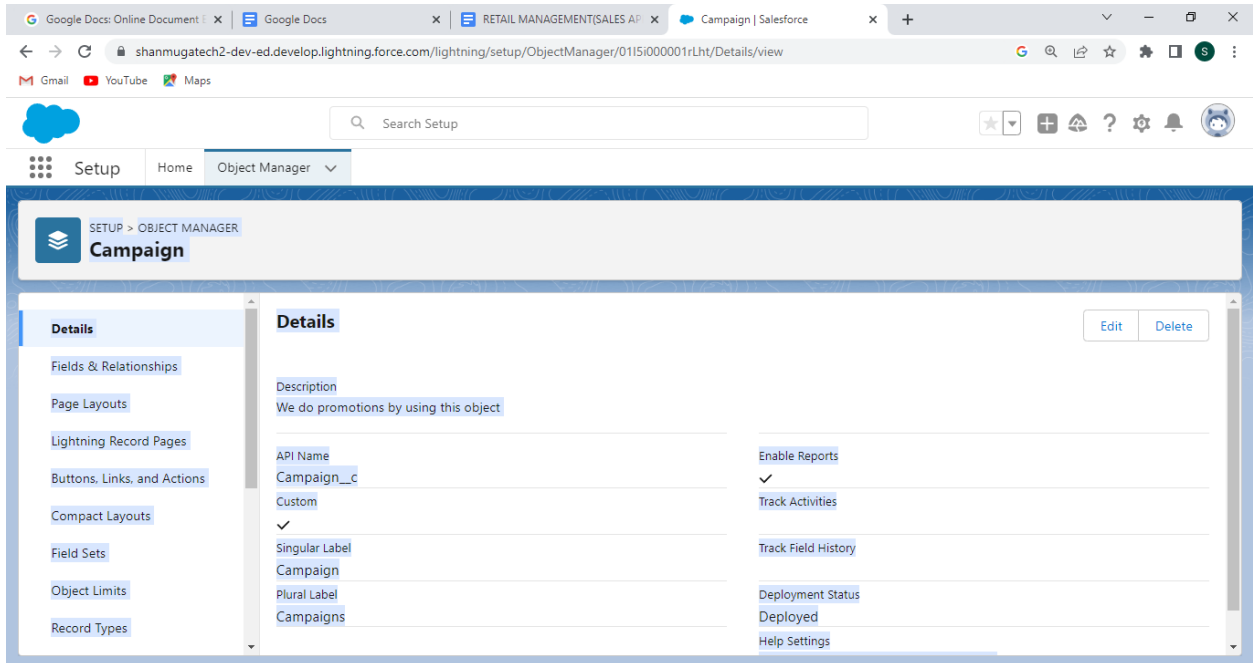
Track Activities

Track Field History

Deployment Status
Deployed

Help Settings

9.CAMPAIGN:-



4. TRAILHEAD PROFILE PUBLIC URL:-

Team Lead - <https://trailblazer.me/id/spriya574>
 Team Member 1 - <https://trailblazer.me/id/sdharshini16>
 Team Member 2 - <https://trailblazer.me/id/swats191>
 Team Member 3 - <https://trailblazer.me/id/ssanmugam2>

5. ADVANTAGES & DISADVANTAGE:

Advantages of a sales app:

1. Increased productivity: Sales apps help automate certain tasks, such as lead management, order processing, and customer follow-up, which saves time and allows sales reps to focus on more important tasks.
2. Better data management: Sales apps can help sales teams manage and analyze data more effectively, providing insights into customer behavior, buying trends, and other critical metrics.
3. Improved collaboration: Sales apps enable team members to share information and work together more efficiently, which can lead to better outcomes and more effective sales strategies.
4. Enhanced customer experience: Sales apps can provide customers with a seamless and personalized buying experience, which can improve customer satisfaction and increase loyalty.

5. Accessible from anywhere: Sales apps can be accessed from anywhere, which allows sales reps to work remotely and collaborate with team members and customers regardless of their location.

Disadvantages of a sales app:

1. Cost: Sales apps can be expensive, especially if they require customization or integration with other software.
2. Complexity: Some sales apps can be complex and difficult to use, which may require additional training or support.
3. Security risks: Sales apps may store sensitive customer and company data, which can be vulnerable to hacking and cyberattacks.
4. Dependence on technology: Sales apps require stable internet connectivity and reliable technology to function properly, which can be a challenge in certain environments.
5. Integration challenges: Sales apps may need to be integrated with other software, which can be time-consuming and require technical expertise.

6.APPLICATIONS:

A retail management app can be applied in various areas of retail, including:

1. Inventory management: The app can help retailers manage their inventory levels, track stock levels, and monitor sales data to ensure that products are always in stock when customers need them.
2. Point-of-sale (POS) transactions: The app can help retailers process transactions, manage payment processing, and generate receipts for customers.
3. Customer relationship management: The app can help retailers manage customer data, track buying habits, and personalize the customer experience to improve customer satisfaction and loyalty.
4. Marketing and promotions: The app can help retailers create and manage marketing campaigns, promotions, and loyalty programs to attract new customers and retain existing ones.
5. Employee management: The app can help retailers manage employee schedules, track time and attendance, and monitor performance metrics to ensure that employees are meeting their goals.
6. Analytics and reporting: The app can help retailers generate reports on sales data, customer behavior, and other key metrics to help them make informed business decisions.

7. Supply chain management: The app can help retailers manage supplier relationships, track shipments, and monitor inventory levels to ensure that they have the products they need when they need them.
8. E-commerce management: The app can help retailers manage their online sales, track website traffic, and analyze customer behavior to optimize their e-commerce strategy.
9. Mobile workforce management: The app can help retailers manage their mobile workforce, including delivery drivers and field sales reps, by tracking their schedules, tasks, and performance.

These are just a few examples of the many areas where a retail management app can be applied to improve efficiency, increase sales, and enhance the customer experience in the retail industry.

7.CONCLUSION:

In conclusion, a retail management sales app is a powerful tool that can help retailers improve their efficiency, increase sales, and enhance the customer experience. By applying a retail management sales app, retailers can manage inventory, process transactions, manage customer data, create and manage marketing campaigns, manage employee schedules, generate reports, manage supplier relationships, manage e-commerce, and manage their mobile workforce.

Overall, the benefits of using a retail management sales app are significant, including improved customer satisfaction, increased revenue, reduced costs, and greater insights into business operations. Therefore, a retail management sales app is a crucial tool for retailers who want to remain competitive and thrive in today's fast-paced and ever-changing retail industry.

8.FUTURE SCOPE:

Here are some possible enhancements that can be made in the future for retail management sales app:

1. Artificial Intelligence (AI) and Machine Learning (ML): Incorporating AI and ML capabilities can help retailers identify patterns, predict sales trends, and provide personalized customer experiences based on individual buying habits.
2. Virtual and Augmented Reality (VR/AR): Integrating VR/AR technology can create immersive shopping experiences for customers and allow them to visualize products in their homes or workplaces.
3. Internet of Things (IoT): Connecting retail management sales app to IoT devices can help retailers manage inventory levels, monitor store traffic, and track customer behavior.
4. Blockchain: Implementing blockchain technology can help retailers manage their supply chain more efficiently, reduce fraud, and increase transparency.

5. Voice Recognition: Integrating voice recognition technology can make it easier for retailers to manage their inventory, process transactions, and communicate with customers.
6. Mobile Payments: Enabling mobile payment options can provide customers with a more convenient and seamless checkout experience.
7. Social Media Integration: Integrating social media into the retail management sales app can help retailers reach new customers and engage with existing ones through targeted advertising and social media promotions.

By incorporating these enhancements, retail management sales app can provide retailers with greater insights into customer behavior, increased efficiency, and a more personalized customer experience. These advancements will ultimately help retailers increase sales, improve customer satisfaction, and stay ahead of the competition in the ever-changing retail landscape.