

RETAIL MANAGEMENT APPLICATION USING SALESFORCE

1. INTRODUCTION

1.1 OVERVIEW

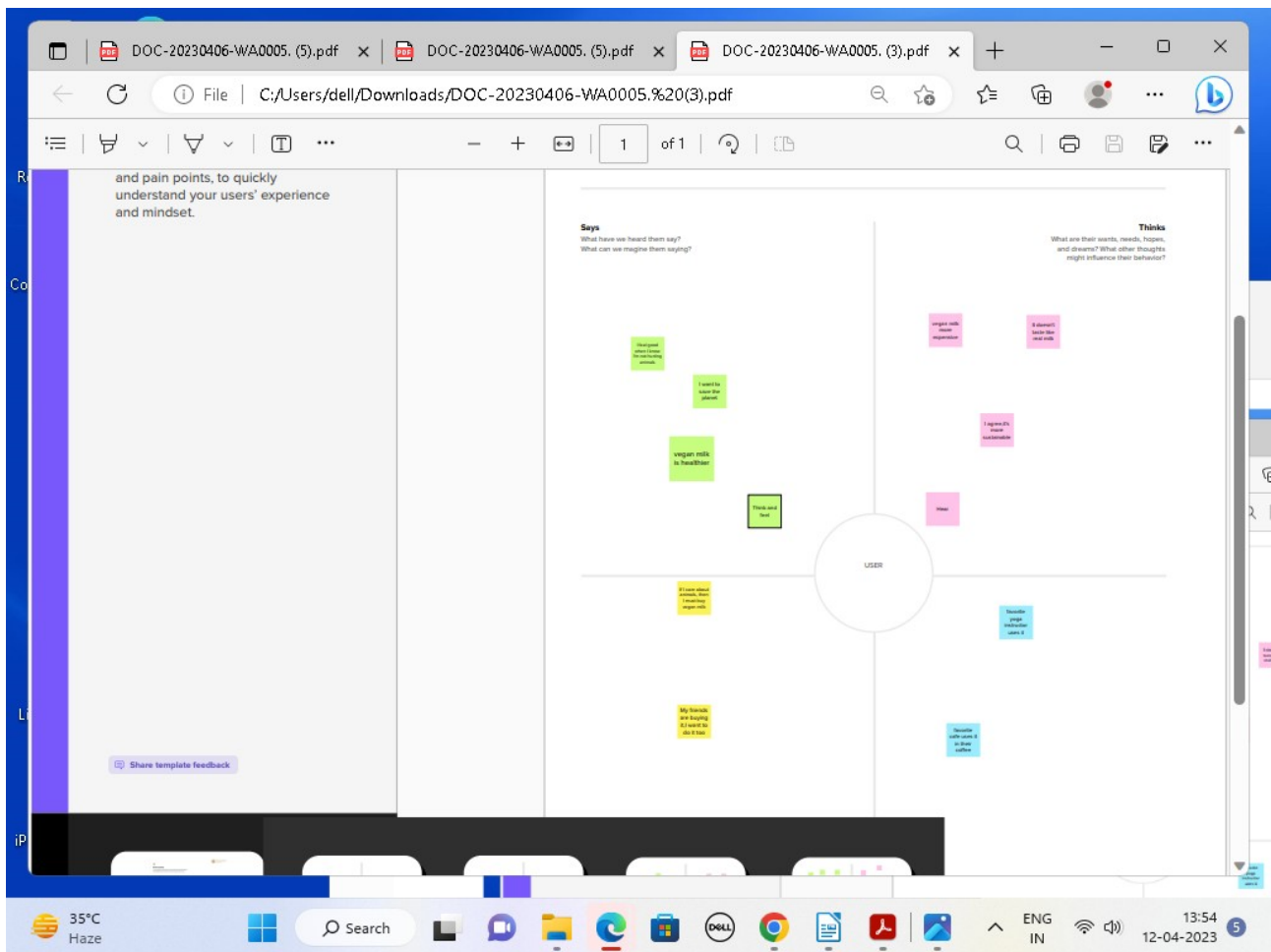
Retail management refers to the process of helping customers find products in your store. It includes everything from increasing your customer pool to how products are presented, and how you fully fill a customer's needs. A good store manager helps customers leave the store with a smile.

1.2 PURPOSE

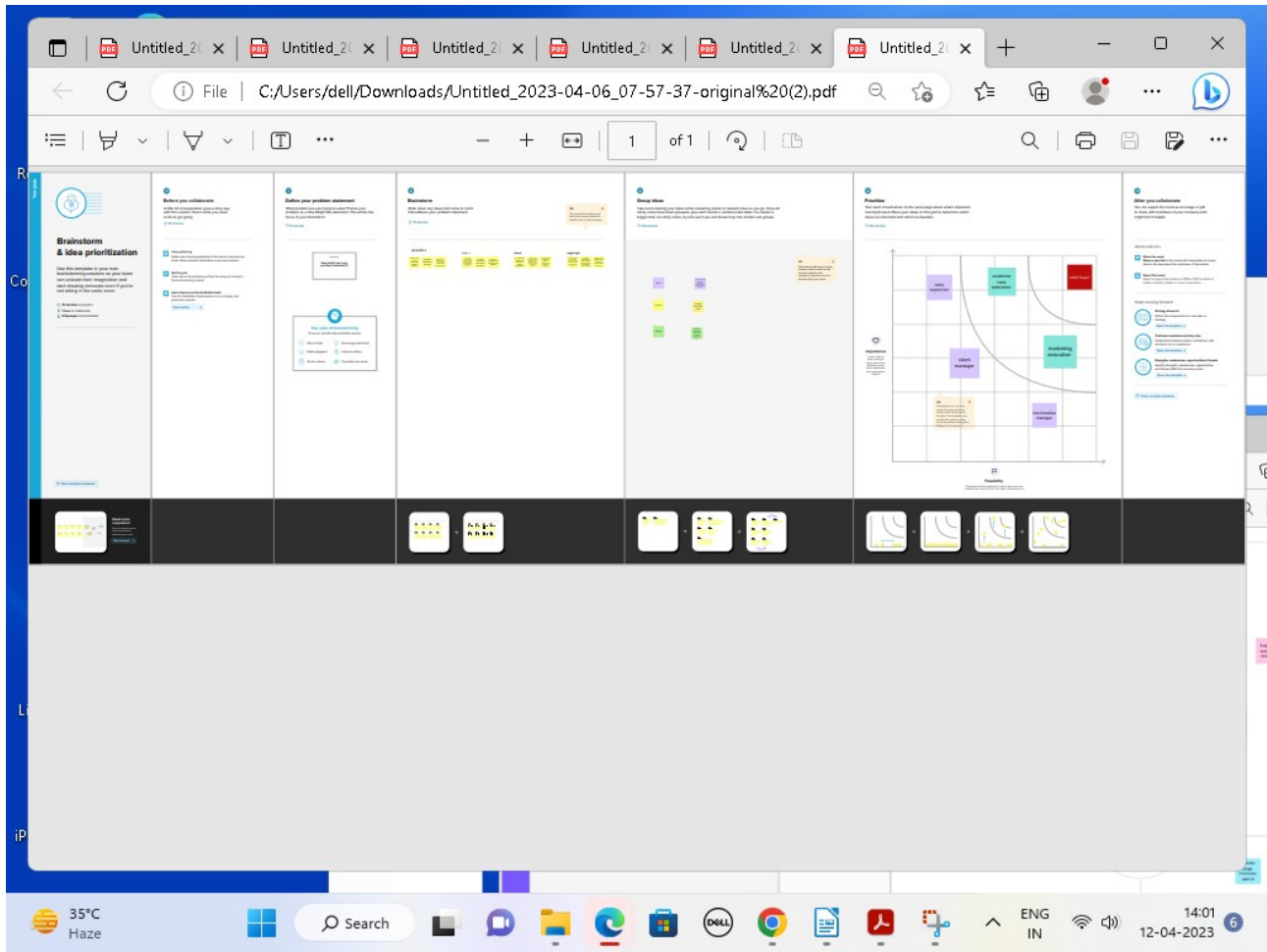
Retail management refers to the process that strives to make sure that consumers are satisfied with the products and services they buy and that retail establishments function well and continue to be profitable.

2 PROBLEM DEFINITION AND DESIGN THINKING

2.1 EMPATHY MAP



2.2 ideation and brainstorming map.



3.RESULT

3.1 DATA MODEL.

Object name	FIELDS IN THE OBJECT	
Obj 1	Field label	Data type
	Display	Text
Obj 2	Field label	Data type
	Display	Text

+

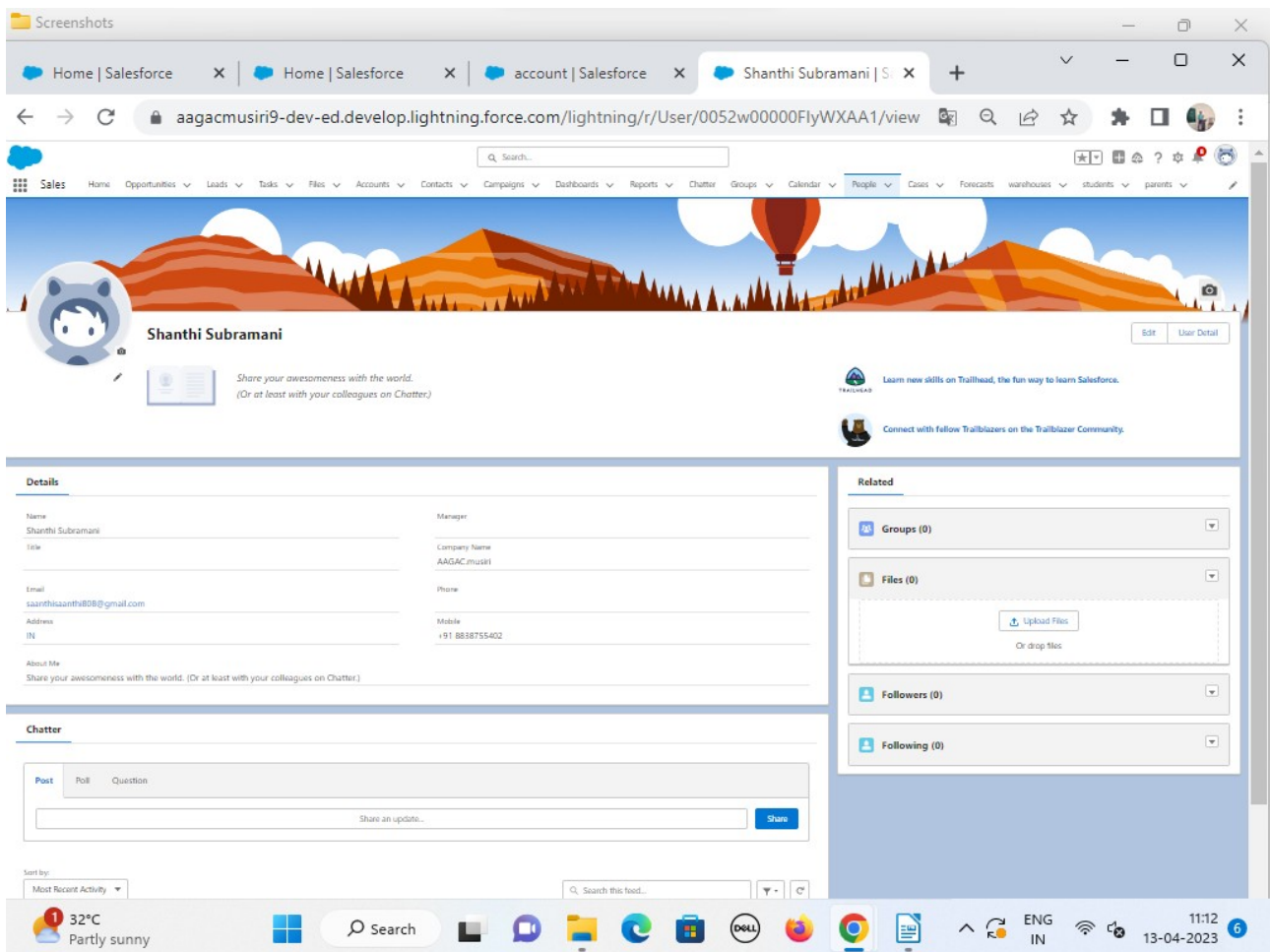
3.2 ACTIVITY AND SRENSHOT

Retail Management Application Using Salesforce.

Milestone-1:

Activity-1

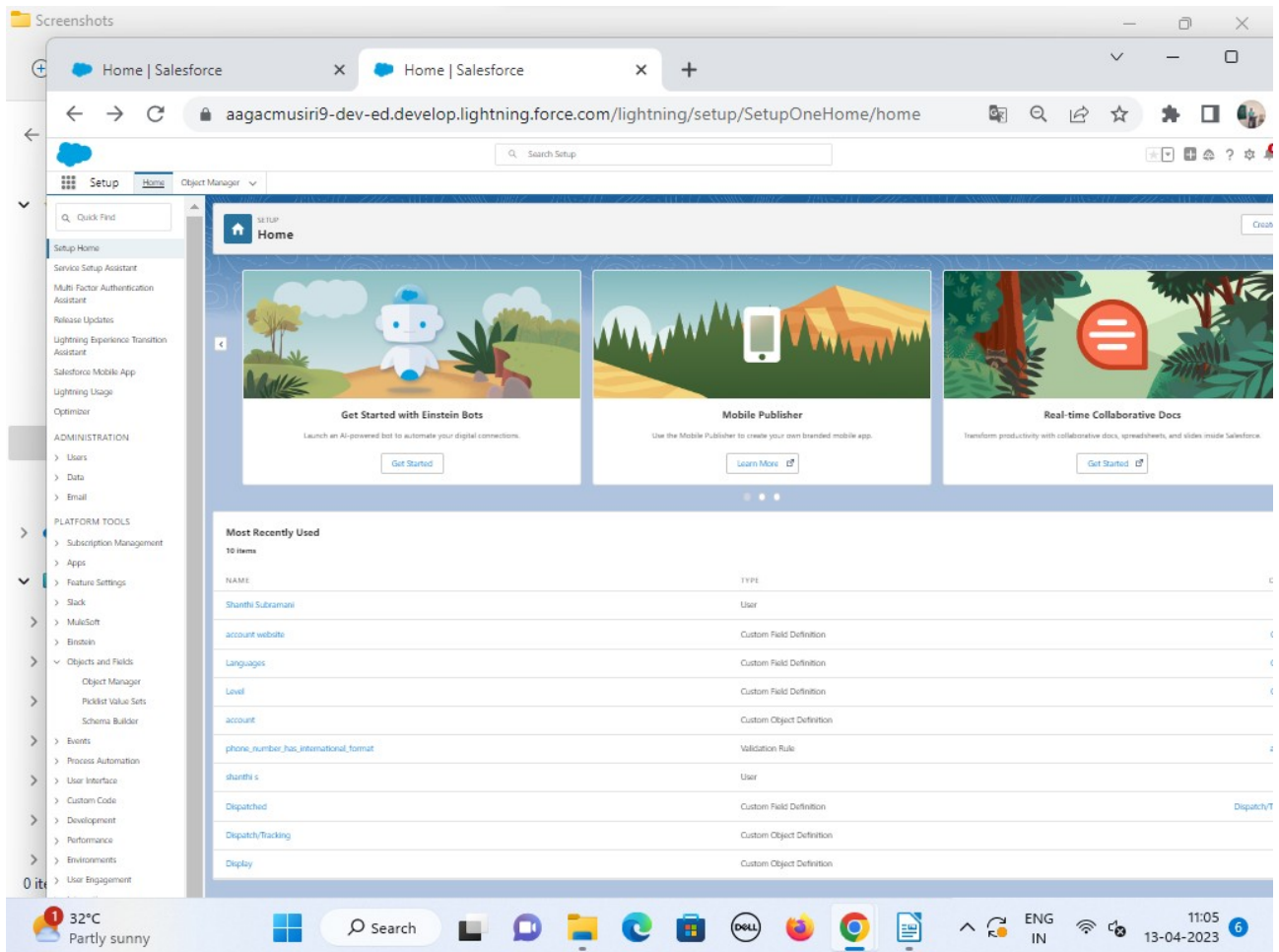
Creating Developer Account



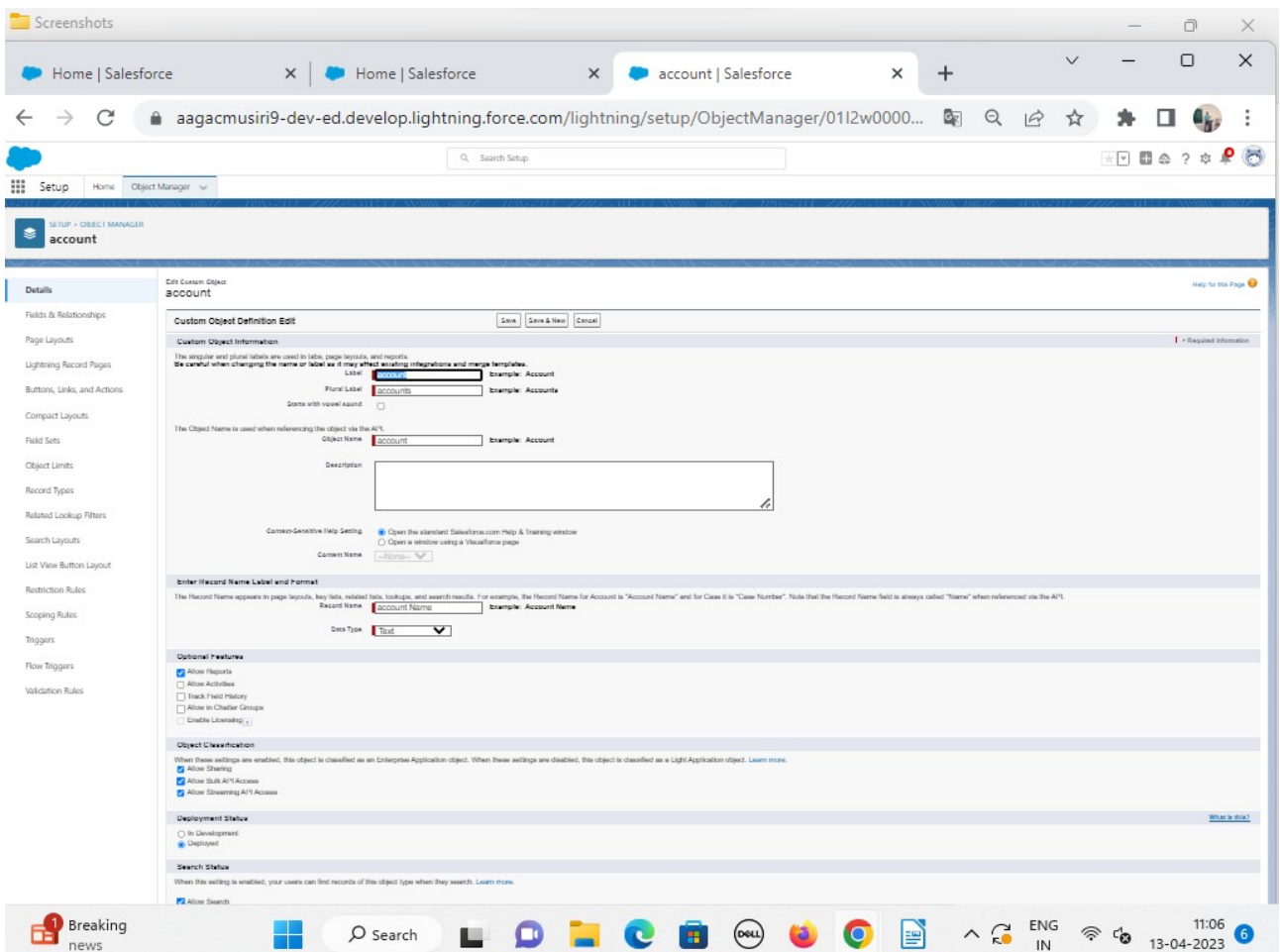
Milestone-2 Object

Activity-1

Creation of object dispatch/Tracking

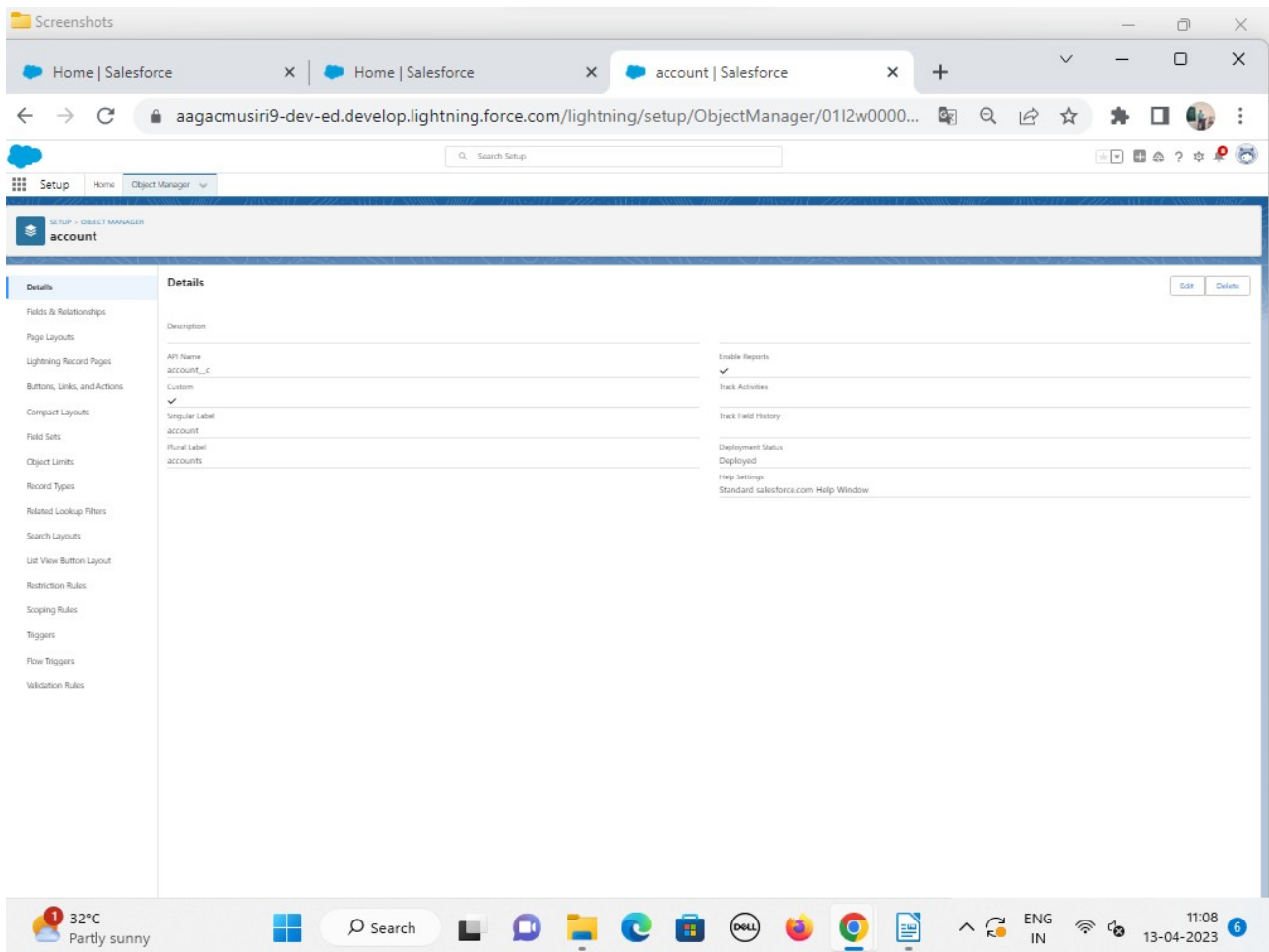


+



Activity-2

Fields available on dispatch/Tracking



Milestone-3

Relationship between objects

Activity-1

Creation of relationship between objects

Cloud logo

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Dispatch/Tracking

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

Restriction Rules

Scoping Rules

Triggers

Edit Dispatch/Tracking Custom Field
Dispatched [Help for this Page](#)

Custom Field Definition Edit [Change Field Type](#) [Save](#) [Cancel](#)

Field Information ! = Required Information

Field Label Data Type URL

Field Name

Description

Help Text

Data Owner

Field Usage

Data Sensitivity Level

Compliance Categorization

Available: PII, HIPAA, GDPR, PCI

Chosen:

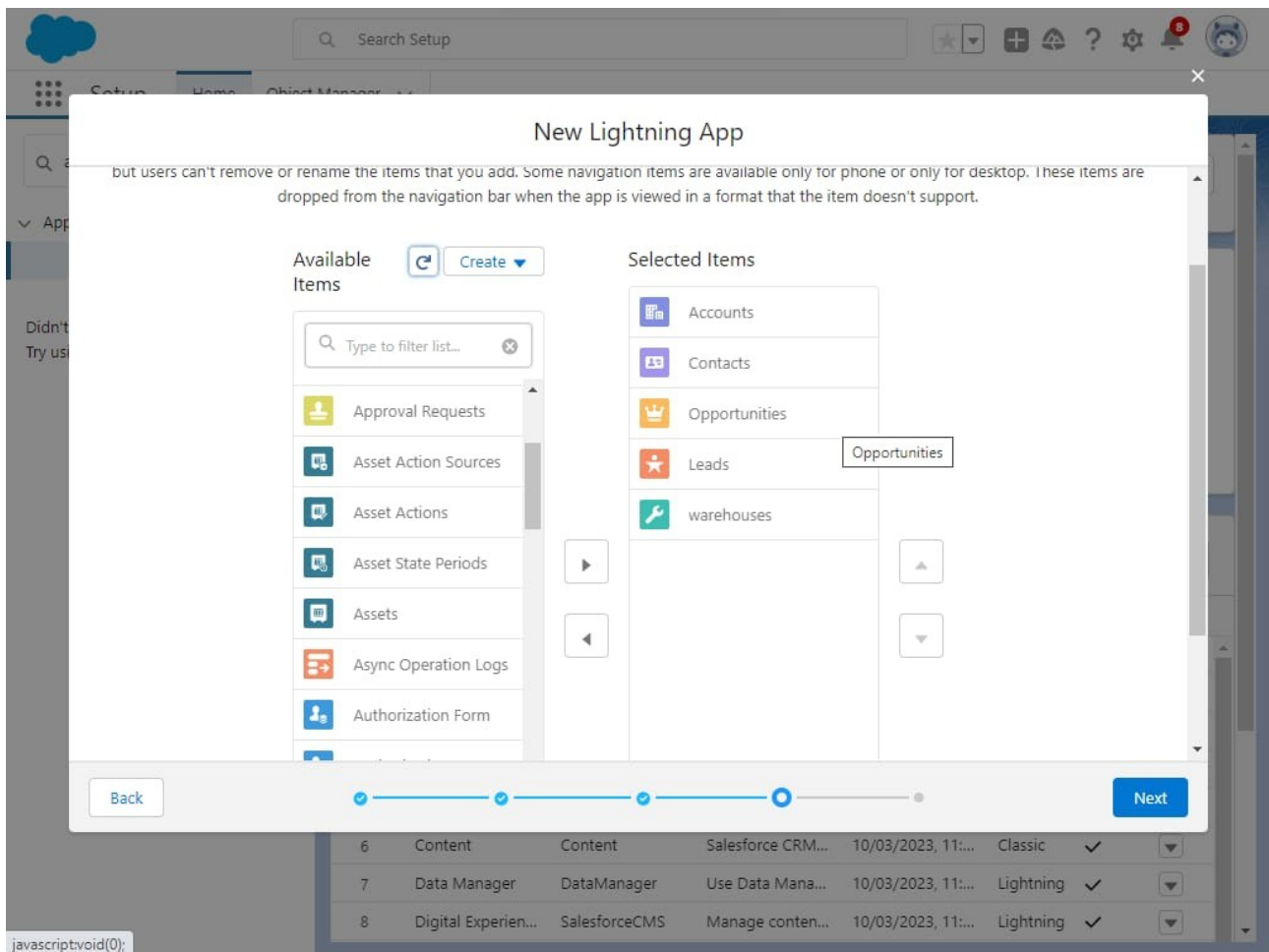
General Options

Required ☐ Always require a value in this field in order to save a record

Default Value Show Formula Editor

Milestone-4

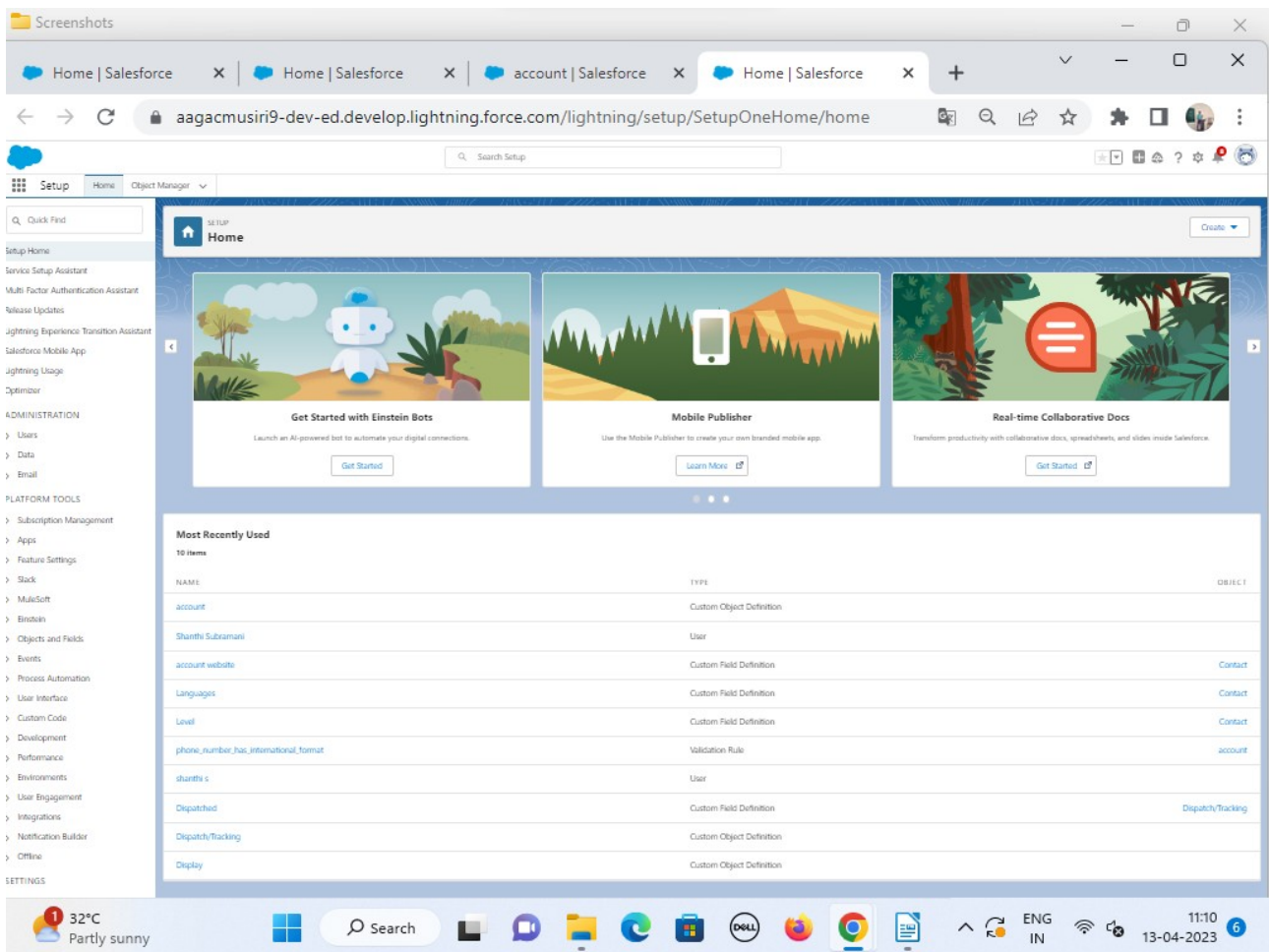
Activity-1



Milestone-5 Layouts:

Activity-1



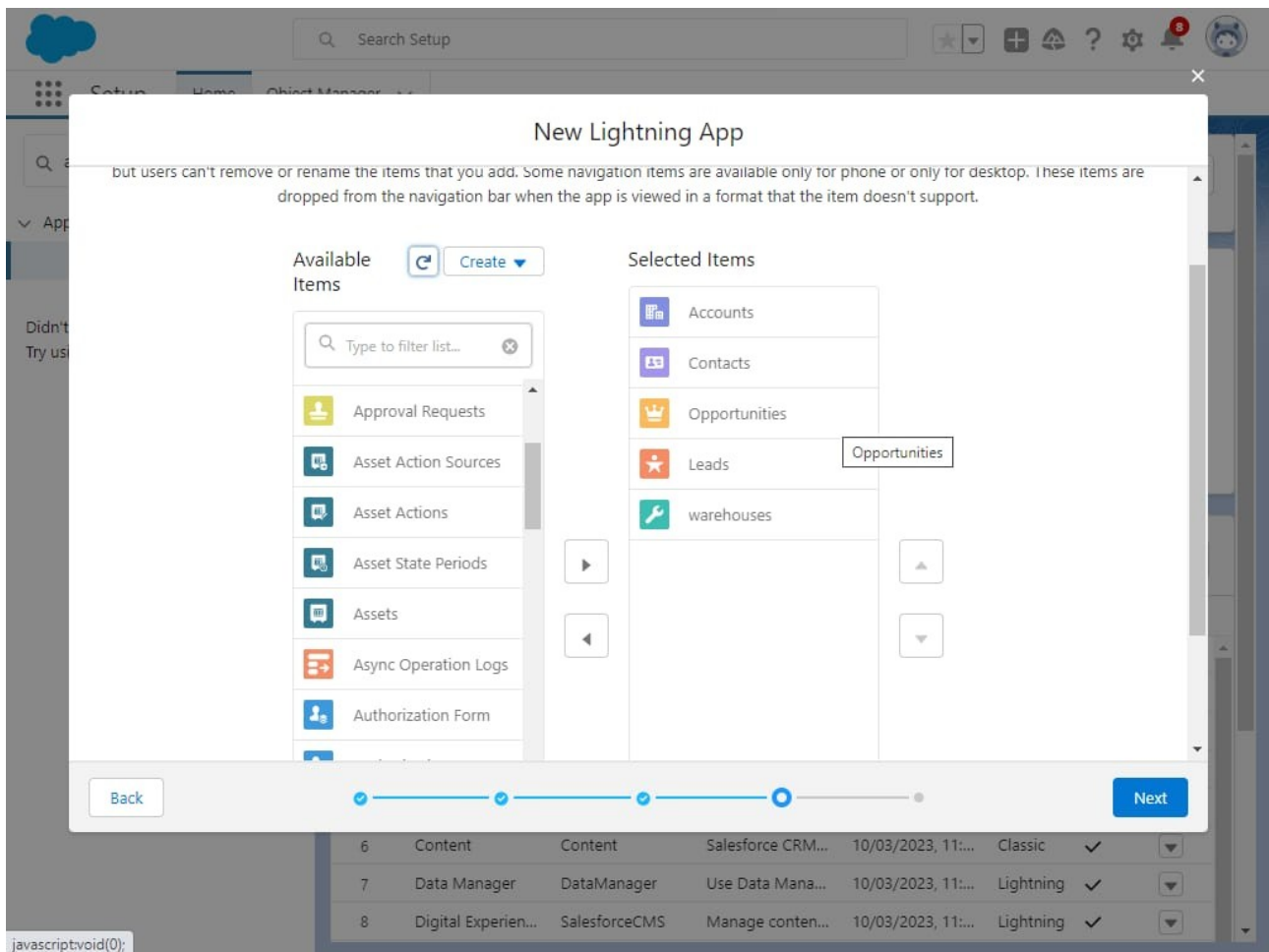


Milestone-4

Application;


Activity-1

Creation of application










Milestone-5 Layouts:

Activity-1;



Search Setup



SetupHomeObject Manager

Q tabs

▼ User Interface

Rename Tabs and Labels

Tabs

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

SETUP
Tabs

Custom Tabs




Help for this Page

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 window. 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 the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs

NewWhat Is This?

Action	Label	Tab Style	Description
Edit Del	parents	 Hexagon	
Edit Del	students	 Compass	
Edit Del	warehouses	 Wrench	

Web Tabs

NewWhat Is This?

No Web Tabs have been defined

Visualforce Tabs

NewWhat Is This?

No Visualforce Tabs have been defined

Lightning Component Tabs

NewWhat Is This?

No Lightning component tabs have been defined

Milestone-6 User:

Activity-1

Setup Home Object Manager

Search Setup

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

User Interface

Action Link Templates

Actions & Recommendations

App Menu

Custom Labels

Density Settings

Global Actions

SETUP Users

User Edit shanthi s Help for this Page

User Edit Save Save & New Cancel

General Information Required Information

First Name shanthi Role <None Specified>

Last Name s User License Salesforce

Alias ss Profile Standard User

Email saanthisaanthi808@gmail.cc Active

Username saanthisaanthi808@gmail.cc Marketing User

Nickname User1679039058770267729 Offline User

Title Knowledge User

Company Flow User

Department Service Cloud User

Division Site.com Contributor User

Site.com Publisher User

WDC User

Data.com User Type --None--

Data.com Monthly Addition 300

Milestone-7 validation Rules:

Activity-1

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
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Validation Rules

Validation Rules

account

Validation Rule

Help for this Page

Define a validation rule by specifying an error condition and a corresponding error message. The error condition is written as a Boolean formula expression that returns true or false. When the formula expression returns true, the save will be aborted and the error message will be displayed. The user can correct the error and try again.

Validation Rule Edit

Save Save & New Cancel

Rule Name

Active

☒

Description

Quick Tip

Operators & Functions

Error Condition Formula

Required Information

Example:

Discount Percent > 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.

Insert Field

Insert Operator

Check Syntax

Functions

-- All Function Categories --
ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN

Insert Selected Function

ABS(number)

Returns the absolute value of a number; a number without its sign

Help on this function

Error Message

Example:

Discount percent cannot exceed 30%

This message will appear when Error Condition formula is **true**

Error Message

This error message can either appear at the top of the page or below a specific field on the page

Error Location

☐ Top of Page
☒ Field

Save Save & New Cancel

Milestone-7 Validation Rules:

Activity-1

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
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Validation Rules

Validation Rules

account

Validation Rule

Help for this Page

Define a validation rule by specifying an error condition and a corresponding error message. The error condition is written as a Boolean formula expression that returns true or false. When the formula expression returns true, the save will be aborted and the error message will be displayed. The user can correct the error and try again.

Validation Rule Edit

Save

Save & New

Cancel

Rule Name

phone_number_has_international_format

Active

☒

Description

Quick Tip

Operators & Functions

Error Condition Formula

Required Information

Example:

Discount Percent > 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.

Insert Field

Insert Operator

LEFT (Name , 1) <> "+"

Check Syntax

Functions

All Function Categories

ABS

ACOS

ADDMONTHS

AND

ASCII

ASIN

Insert Selected Function

ABS(number)

Returns the absolute value of a number; a number without its sign.

Help on this function

Error Message

Example:

Discount percent cannot exceed 30%

This message will appear when Error Condition formula is **true**.

Error Message

phone number must begin with + (country code)

This error message can either appear at the top of the page or below a specific field on the page.

Error Location

☐ Top of Page
☒ Field

account Name


Save

Save & New

Cancel

Milestone-8 Dashboards:

Activity-1



Setup
Home
Object Manager

Contact

Details
Fields & Relationships

Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking

33+ Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Account Name	Accountid	Lookup(Account)		✓
account website	account_website__c	Formula (Text)		
Assistant	AssistantName	Text(40)		
Asst. Phone	AssistantPhone	Phone		
Birthdate	Birthdate	Date		
Clean Status	CleanStatus	Picklist		✓
Contact Owner	OwnerId	Lookup(User)		✓
Created By	CreatedById	Lookup(User)		
Data.com Key	Jigsaw	Text(20)		
Department	Department	Text(80)		
Description	Description	Long Text Area(32000)		
Do Not Call	DoNotCall	Checkbox		
Email	Email	Email		✓
Email Opt Out	HasOptedOutOfEmail	Checkbox		
Fax	Fax	Fax		
Fax Opt Out	HasOptedOutOfFax	Checkbox		
Gender Identity	GenderIdentity	Picklist		
Home Phone	HomePhone	Phone		
Individual	IndividualId	Lookup(Individual)		✓
Languages	Languages__c	Text(100)		
Last Modified By	LastModifiedById	Lookup(User)		
Last Stay-in-Touch Request Date	LastCURequestDate	Date/Time		

Milestone-8 Dashboard

Activity-1

The screenshot displays the Salesforce Reports page. At the top, there's a navigation bar with tabs for Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports (selected), Chatter, Groups, and More. A search bar is located in the top right. Below the navigation bar, the 'Reports' section is active, showing a 'Recent' list with one item. The item is a report titled 'products with stock availability' created by 'Shanthi Subramani' on '17/3/2023, 1:22 pm'. The report is located in the 'Private Reports' folder. On the left side, there's a sidebar with categories: REPORTS (Recent, Created by Me, Private Reports, Public Reports, All Reports), FOLDERS (All Folders, Created by Me, Shared with Me), and FAVORITES (All Favorites). At the bottom left, there's a 'To Do List' icon.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	products with stock availability		Private Reports	Shanthi Subramani	17/3/2023, 1:22 pm	

4.Trailhead profile public URL

Team Lead-<https://trailblazer.me/id/ssubramani227>

Team Member 1-<https://trailblazer.me/id/subas186>

Team Member 2-<https://trailblazer.me/id/siva1391>

Team Member 3-<https://trailblazer.me/id/sugin>

5 ADVANTAGES AND DISADVANTAGE

RETAIL MANAGEMENT ADVANTAGE

Here are the benefits of having effective retail management strategies in a store environment.

Optimises all store processes.

A company can increase the efficiency of each process and better ensure a high -quality standard for employees.As a result executives may accomplish their goals at faster rates.

RETAIL MANAGEMENT DIS ADVANTAGE

The screenshot displays the Salesforce Reports page. At the top, there's a navigation bar with various tabs like Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports (selected), Chatter, Groups, and More. A search bar is also present. Below the navigation bar, the 'Reports' section is active, showing a 'Recent' filter and a search bar for recent reports. A table lists reports with columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. One report is visible: 'products with stock availability' in the 'Private Reports' folder, created by 'Shanthi Subramani' on '17/3/2023, 1:22 pm'. A left sidebar contains filters for Reports (Recent, Created by Me, Private Reports, Public Reports, All Reports), Folders (All Folders, Created by Me, Shared with Me), and Favorites (All Favorites). At the bottom left, there's a 'To Do List' icon.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	products with stock availability		Private Reports	Shanthi Subramani	17/3/2023, 1:22 pm	

5 RETAIL MANAGEMENT ADVANTAGE

Here are the benefits of having effective retail management strategies in a store environment .A
OPTIMISES ALL STORE PROCESS: a company can increase the efficiency of each process and better ensure a high quality standard for employees.

RETAIL MANAGEMENT DISADVANTAGE

Inadequate capital is always a big problem to their trade. No room for expansion due to lack of enough capital.Inability to enjoy economics of scale.

6 APPLICATIONS

Retail management software is technology that helps business owner drive more sales with applications that include point of sale.

7 CONCLUSION

Whether you have a small shop for a big store, if you are running a retail business, then RETAIL MANAGEMENT IS MUST TO RUN IT EFFICIENTLY. Either you are a seller or a customer , every body has 24 hours in a day and the time is very important for all.

8 FUTURE SCOPE

The process of assisting consumers in obtaining desired products from retail outlets for personal use is referred to as retail management.

