

Retail Managemant Application Using Salesforce

TEAM MEAD

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RETAIL MANAGEMENT APPLICATION USING SALESFORCE

1.INTRODUCTION:

1.1 Overview

Retailing encompasses the business activities involved in selling goods and services to consumers for their personal, family, or household etc. A CRM product owner has requested to create two applications, one is a sales app for sales reps to use this application and store customers data, and the second application is a service app for service reps/agents to provide support to customers in dealing cases. To generate business on top of the customers

1.2 Purpose

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

2.Problem Definition & Design Thinking

2.1 Empathy map

Ideation Phase Empathize & Discover

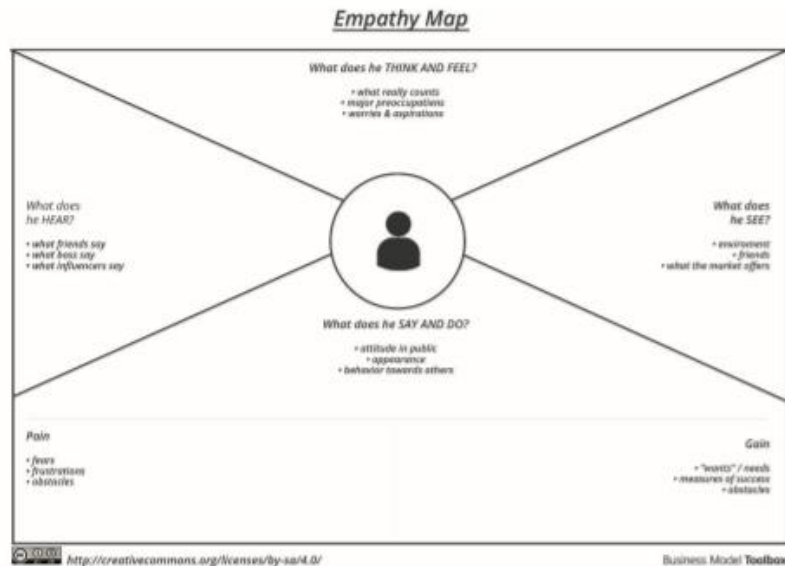
Date	13 March 2023
Team ID	NM2023TMIDxxxxx
Project Name	Project - xxx
Maximum Marks	5 Marks

Empathy Map Canvas:

An empathy map is a simple, easy-to-digest visual that captures knowledge about a user's behaviours and attitudes.

It is a useful tool to help teams better understand their users. Creating an effective solution requires understanding the true problem and the person who is experiencing it. The exercise of creating the map helps participants consider things from the user's perspective along with his or her goals and challenges.

Example:



Reference: <https://www.mural.co/templates/empathy-map-canvas>

Example: Food Ordering & Delivery Application



2.2 Problem Definition & Design Thinking

Step-2: Brainstorm, Idea Listing and Grouping

Step-3: Idea Prioritization

1

Priority

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.

30 minutes



3.Result

3.1 Data Model:

Object name

obj1

Dispatch

obj2

Account website

Fields in the Object

Field label

Dispatched

Tracking

Data type

checkbox

Text

Field label

account_website

accountwebsite

Data type

Checkbox

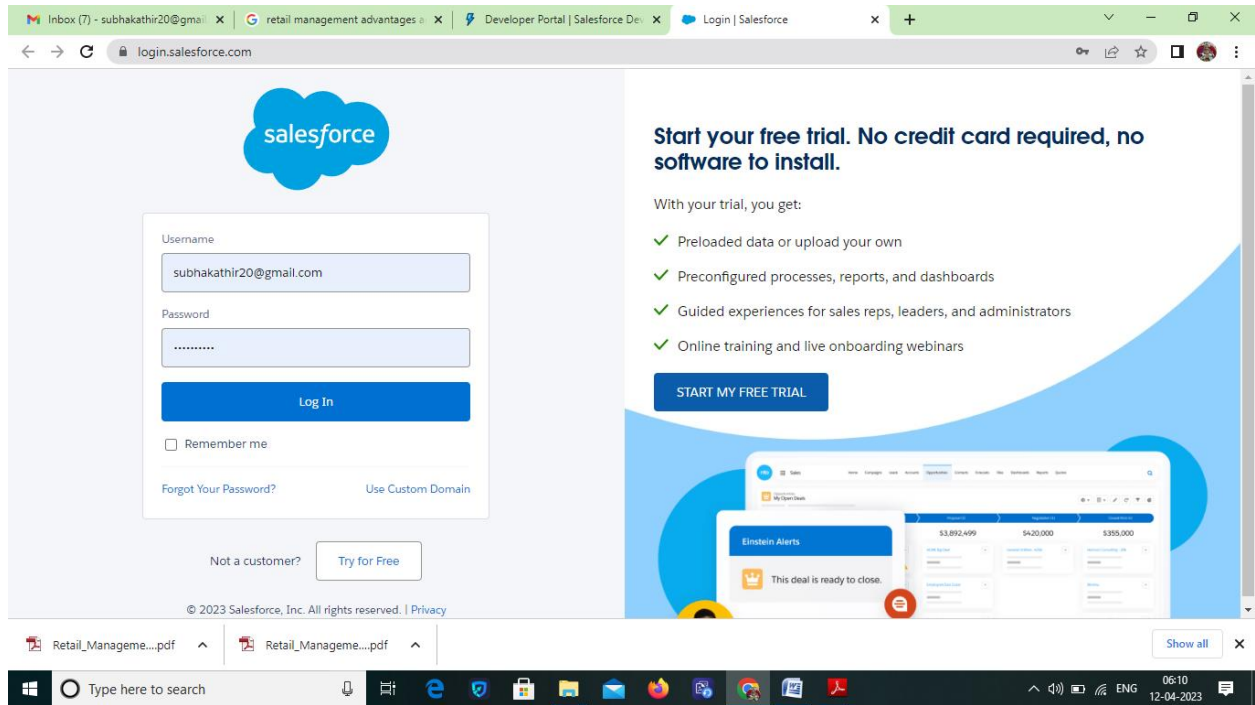
text

3.2 Activity & Screenshot

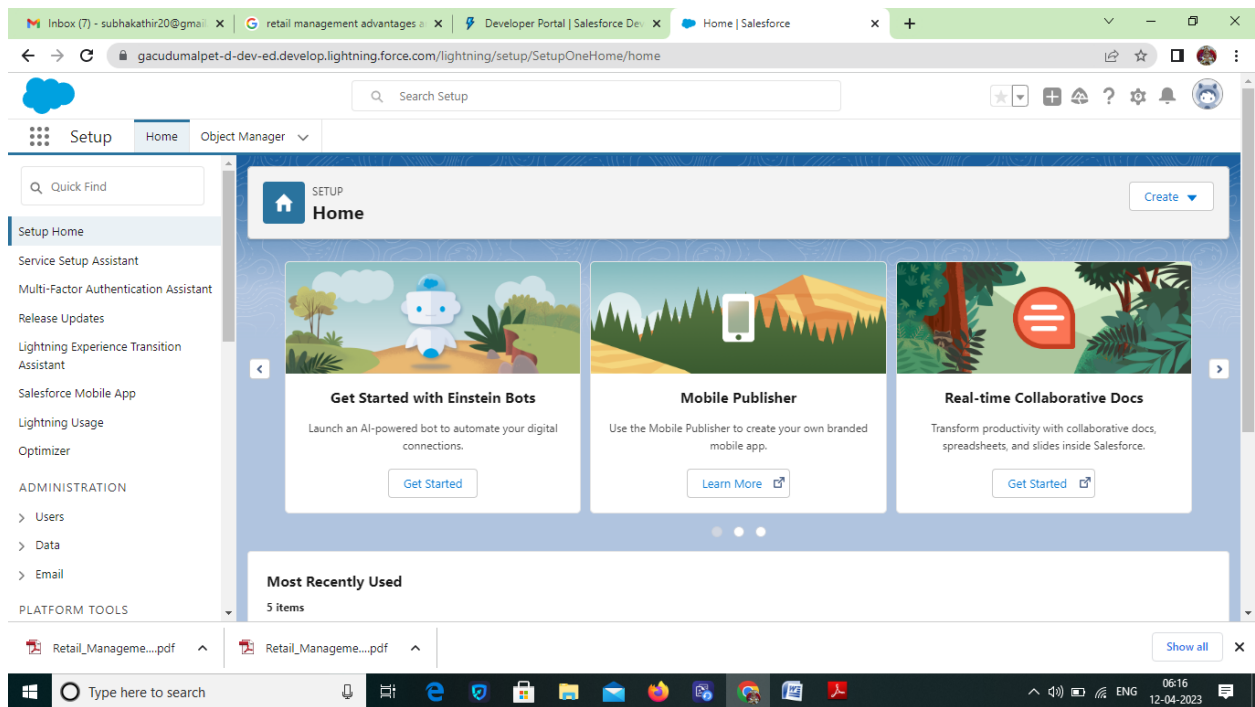
Milestone 1

Create Sales force Org:

RETAIL MANAGEMENT APPLICATION USING SALESFORCE



LOGIN TO SALESFORCE ACCOUNT



Milestone-2

Activity-1

Creation of object Dispatch/Trackings

The screenshot shows the Salesforce Setup interface for Custom Tabs. The browser address bar indicates the URL: `gacudumalpet64-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2Fcustomtabs.jsp%3Fsetupid%3DCustomTabs...`. The left sidebar shows the navigation menu with 'Setup' selected, and 'Custom Tabs' is highlighted under the 'User Interface' section. The main content area is titled 'Custom Tabs' and includes a 'Help for this Page' link. Below the title, there is a description: '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.'

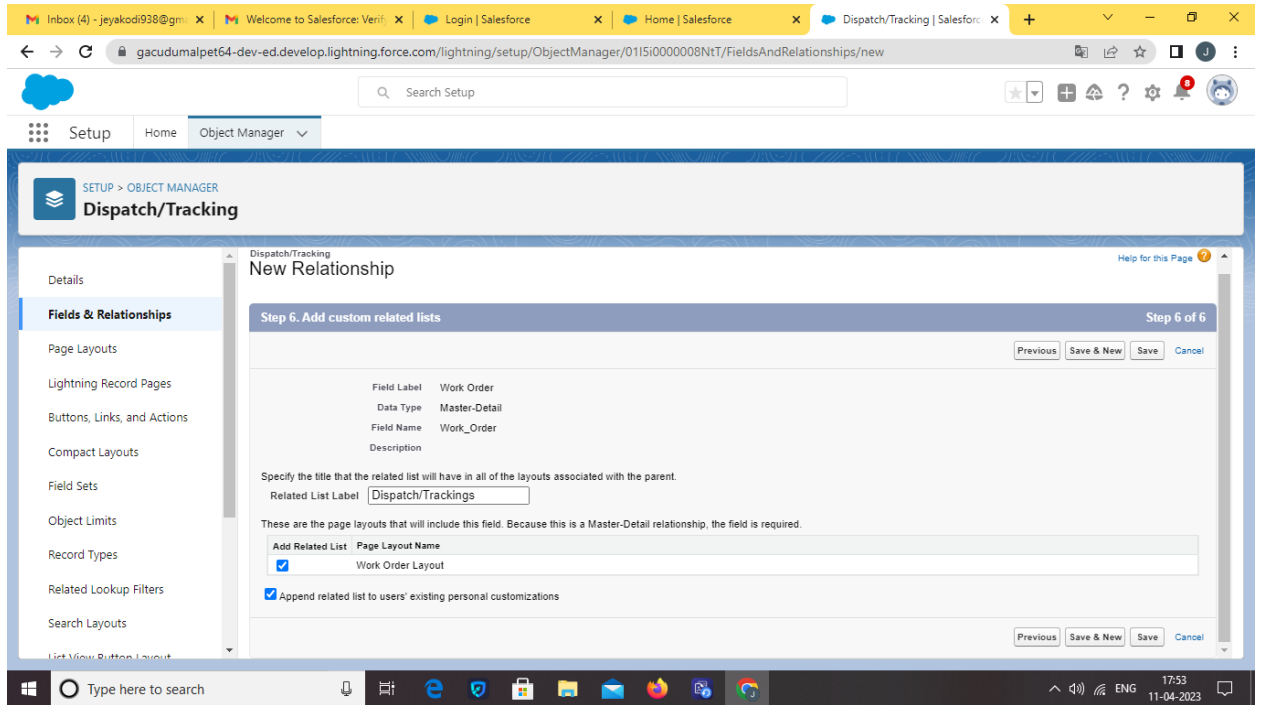
The 'Custom Object Tabs' section contains a table with the following data:

Action	Label	Tab Style	Description
Edit Del	Dispatch/Trackings	Alarm clock	

The 'Web Tabs', 'Visualforce Tabs', and 'Lightning Component Tabs' sections each have a 'New' button and a 'What Is This?' link, and currently show 'No [type] Tabs have been defined'.

Activity-2

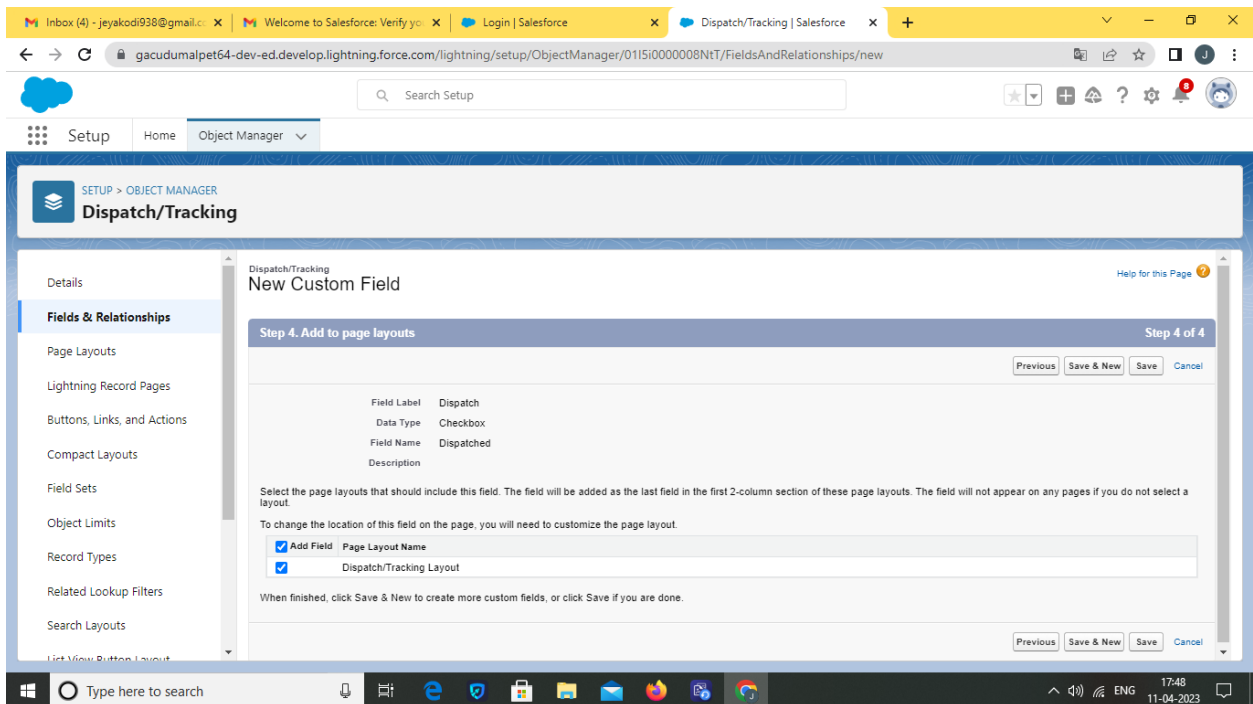
Creatin of Fields on Dispatch/Tracking



Milestone-3

Activity-1

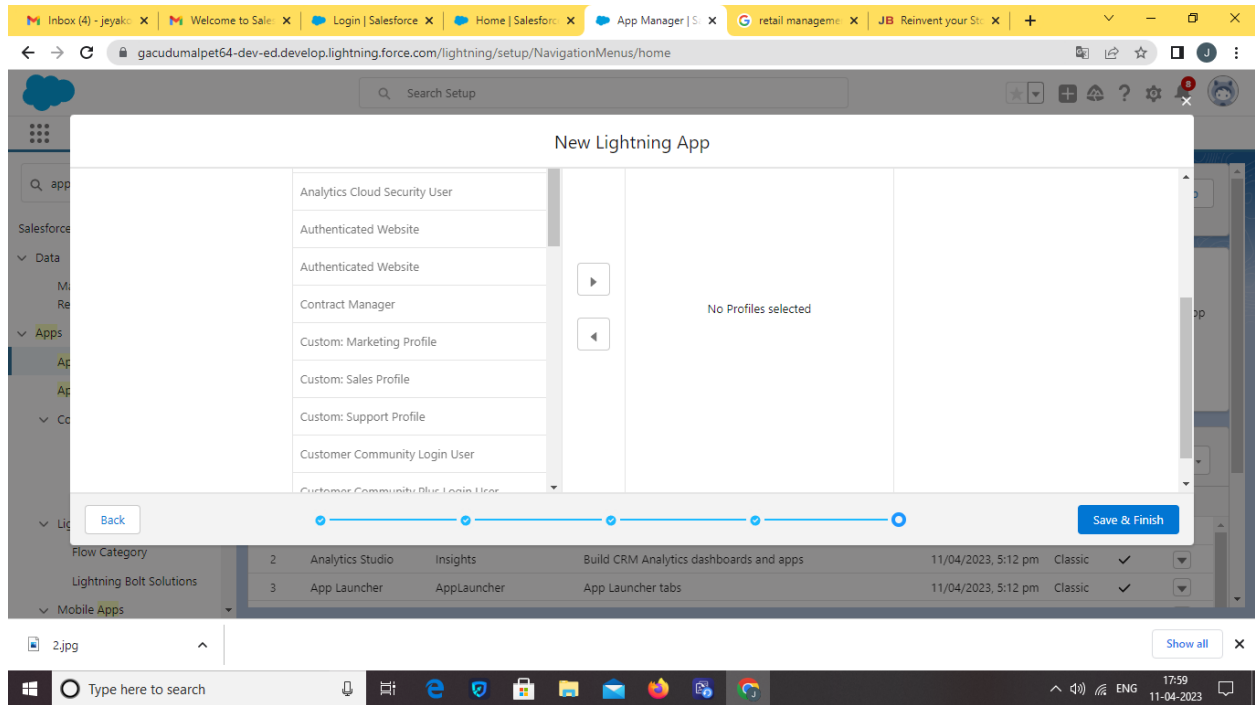
Creation of relationship between objects



Milestone-4

Activity-1

Creation of Application



Milestone-5

Activity-1

Creation of custom Tabs

The screenshot shows the Salesforce Setup interface for Custom Tabs. The left sidebar contains a search bar with 'tab' entered and a list of navigation items: User Interface, Loaded Console Tab Limit, Rename Tabs and Labels, and Tabs (which is highlighted). Below the sidebar is a search bar with the text 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Custom Tabs' and includes a 'Help for this Page' link. It contains three sections: 'Custom Object Tabs' with a table showing a tab for 'Dispatch/Trackings' with a purple 'Alarm clock' icon; 'Web Tabs' with a message 'No Web Tabs have been defined'; and 'Visualforce Tabs' with a message 'No Visualforce Tabs have been defined'. At the bottom, there is a section for 'Lightning Component Tabs'.

Milestone-6

Activity-1

Creation of user

The screenshot shows the Salesforce Setup interface for User Management. The left sidebar contains a search bar with 'users' entered and a list of navigation items: Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users (which is highlighted). Below the sidebar is a search bar with the text 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Users' and includes a 'Setup' button. It contains several sections: 'Country' with a dropdown menu; 'Single Sign On Information' with a 'Federation ID' field; 'Locale Settings' with 'Time Zone' set to '(GMT+05:30) India Standard Time (Asia/Kolkata)', 'Locale' set to 'English (India)', and 'Language' set to 'English'; 'Approver Settings' with 'Delegated Approver' and 'Manager' fields, and 'Receive Approval Request Emails' set to 'Only if I am an approver'; and a checkbox for 'Generate new password and notify user immediately'. At the bottom, there are 'Save', 'Save & New', and 'Cancel' buttons.

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. The left sidebar contains a search bar and a navigation menu with options like 'Users', 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', and 'User Management Settings'. The main content area displays the 'User Detail' for 'jeyakodi karuppu'. The user's email is jeyakodi938@gmail.com and the username is jeyasundar@gmail.com. The user is active and has the role of 'Cross Org Data Proxy User'. The 'User License' is 'Cross Org Data Proxy User'. The 'Marketing User' checkbox is checked. The 'Offline User' checkbox is unchecked. The 'Knowledge User' checkbox is unchecked. The 'Flow User' checkbox is unchecked. The 'Service Cloud User' checkbox is unchecked. The 'Site.com Contributor User' checkbox is unchecked. The 'Site.com Publisher User' checkbox is unchecked. The 'WDC User' checkbox is unchecked. The 'Mobile Push Registrations' checkbox is unchecked. The 'Data.com User Type' checkbox is unchecked. The 'Delegated Approver' checkbox is unchecked.

Milestone-7

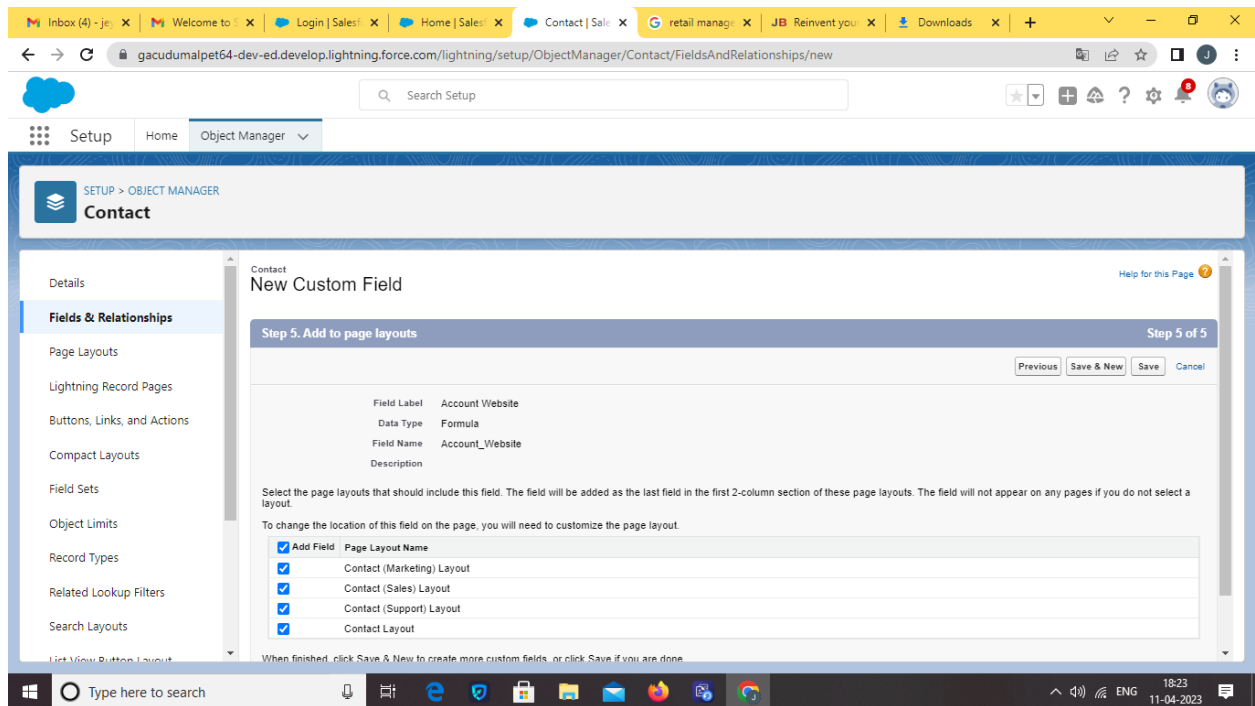
Activity-1

Creation of validation rule

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. The left sidebar contains a search bar and a navigation menu with options like 'Object Manager', 'Account Validation Rule', 'Validation Rule Detail', 'Rule Name', 'Error Condition Formula', 'Error Message', 'Description', 'Created By', 'Modified By', 'Error Location', and 'Account Name'. The main content area displays the 'Account Validation Rule' for 'Phone_number_has_international_format'. The rule is active. The 'Error Condition Formula' is 'LEFT(Phone, 1) <> "+"'. The 'Error Message' is '+916369430861'. The 'Error Location' is 'Account Name'. The 'Description' is 'jeyakodi karuppu, 11/04/2023, 6:18 pm'. The 'Created By' is 'jeyakodi karuppu, 11/04/2023, 6:18 pm'. The 'Modified By' is 'jeyakodi karuppu, 11/04/2023, 6:18 pm'.

Activity-2

Creation of cross object



Milestone-7

Activity

Creation of report

REPORT ▾
New Accounts Report Accounts

Previewing a limited number of records; Run the report to see everything. Update Preview Automatically

	Last Activity	Account Owner	Account Name	Billing State/Province	Type	Rating	Last Modified Date
1	-	je yakodi karuppu	Dickenson plc	KS	Customer - Channel	-	11/04/2023
2	-	je yakodi karuppu	Grand Hotels & Resorts Ltd	IL	Customer - Direct	Warm	11/04/2023
3	-	je yakodi karuppu	Express Logistics and Transport	OR	Customer - Channel	Cold	11/04/2023
4	-	je yakodi karuppu	University of Arizona	AZ	Customer - Direct	Warm	11/04/2023
5	-	je yakodi karuppu	United Oil & Gas Corp.	NY	Customer - Direct	Hot	11/04/2023
6	-	je yakodi karuppu	sForce	CA	-	-	11/04/2023
7	-	je yakodi karuppu	United Oil & Gas, UK	UK	Customer - Direct	-	11/04/2023
8	-	je yakodi karuppu	United Oil & Gas, Singapore	Singapore	Customer - Direct	-	11/04/2023
9	-	je yakodi karuppu	Edge Communications	TX	Customer - Direct	Hot	11/04/2023
10	-	je yakodi karuppu	Burlington Textiles Corp of America	NC	Customer - Direct	Warm	11/04/2023
11	-	je yakodi karuppu	GenePoint	CA	Customer - Channel	Cold	11/04/2023
12	-	je yakodi karuppu	Pyramid Construction Inc.	-	Customer - Channel	-	11/04/2023

To Do List

Create Report

Category

Recently Used

All

Accounts & Contacts

Opportunities

Customer Support Reports

Leads

Campaigns

Activities

Select a Report Type

Search Report Types...

Report Type Name	Category
Accounts	Standard
Contacts & Accounts	Standard
Accounts with Partners	Standard
Account with Account Teams	Standard
Accounts with Contact Roles	Standard
Accounts with Assets	Standard

https://gacudumalpet64-dev-ed.develop.lightning.force.com/reports/lightningReportApp.app#

Milestone-8

Activity

Creation of dashboard

5 ADVANTAGES & DISADVANTAGES

Advantages

Retail accounting is an attractive option for a variety of different types of retail stores because it allows you to calculate your inventory without the need to manually tally everything. For store owners who cannot easily count all of their items, this method of accounting can be a good way to find your current inventory based on your sales figures. This method is also beneficial because of how easy it can be to estimate your inventory without the need for complex equations.

Another important advantage of retail accounting is that this method of accounting can provide tax benefits depending on what method you choose to use. Whether you use FIFO, LIFO or the weighted average method, each of these techniques can produce slightly different results. While these are all valid methods, the difference in the estimates they provide can potentially prove beneficial when reporting your taxes, as differences in inventory or sales figures may be deductible.

Disadvantages

While retail accounting can be an easy way to estimate the amount of inventory you have in your possession, there are some drawbacks to this method as well. Depending on what type of items you sell, retail accounting may provide inaccurate results. If you sell a variety of different items at vastly different prices, the different methods of retail accounting may not give accurate results.

Another disadvantage of retail accounting is that the system can be inconsistent and only provide an estimate. Retail accounting can save you time if you don't want to manually count all of your inventory, but it may also provide less accurate numbers than manually counting would. In addition, any figure produced by retail accounting is only an estimate, so it's nearly impossible to provide an exact number with this technique.

6 APPLICATIONS

Retail management

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 fulfill 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.

Retail management saves time and ensures the customers easily locate their desired merchandise and return home satisfied.

An effective management avoids unnecessary chaos at the store.

Effective Management controls shopliftings to a large extent.

- The retailer must keep a record of all the products coming into the store.
 - The products must be well arranged on the assigned shelves according to size, colour, gender, patterns etc.
 - Plan the store layout well.
 - The range of products available at the store must be divided into small groups comprising of similar products. Such groups are called categories. A customer can simply walk up to a particular category and look for products without much assistance.
 - A unique SKU code must be assigned to each and every product for easy tracking.
 - Necessary labels must be put on the shelves for the customers to locate the merchandise on their own.
 - Don't keep the customers waiting.
 - Make sure the sales representatives attend the customers well. Assist them in their shopping. Greet them with a smile.
 - The retailer must ensure enough stock is available at the store.
 - Make sure the store is kept clean. Don't stock unnecessary furniture as it gives a cluttered look to the store. The customers must be able to move freely.
 - The store manager, department managers, cashier and all other employees should be trained from time to time to extract the best out of them. They should be well aware of their roles and responsibilities and customer oriented. They should be experts in their respective areas.
 - The store manager must make daily sales reports to keep a track of the cash flow. Use softwares or maintain registers for the same.
 - Remove the unsold merchandise from the shelves. Keep them somewhere else.
 - Create an attractive display.
 - Plan things well in advance to avoid confusions later on.
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7 CONCLUSION

8 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.

Retail management has become one of the fastest-growing occupations in the industry as the economy has grown significantly. The retail industry in India is the most appealing and fastest-growing in the world, demanding an increase in competent expertise in this discipline.

It intends to create a new generation of international-caliber smart retail experts by providing them with global best practices
