

RETAIL MANAGEMENT

1 Introduction

1.1 Overview

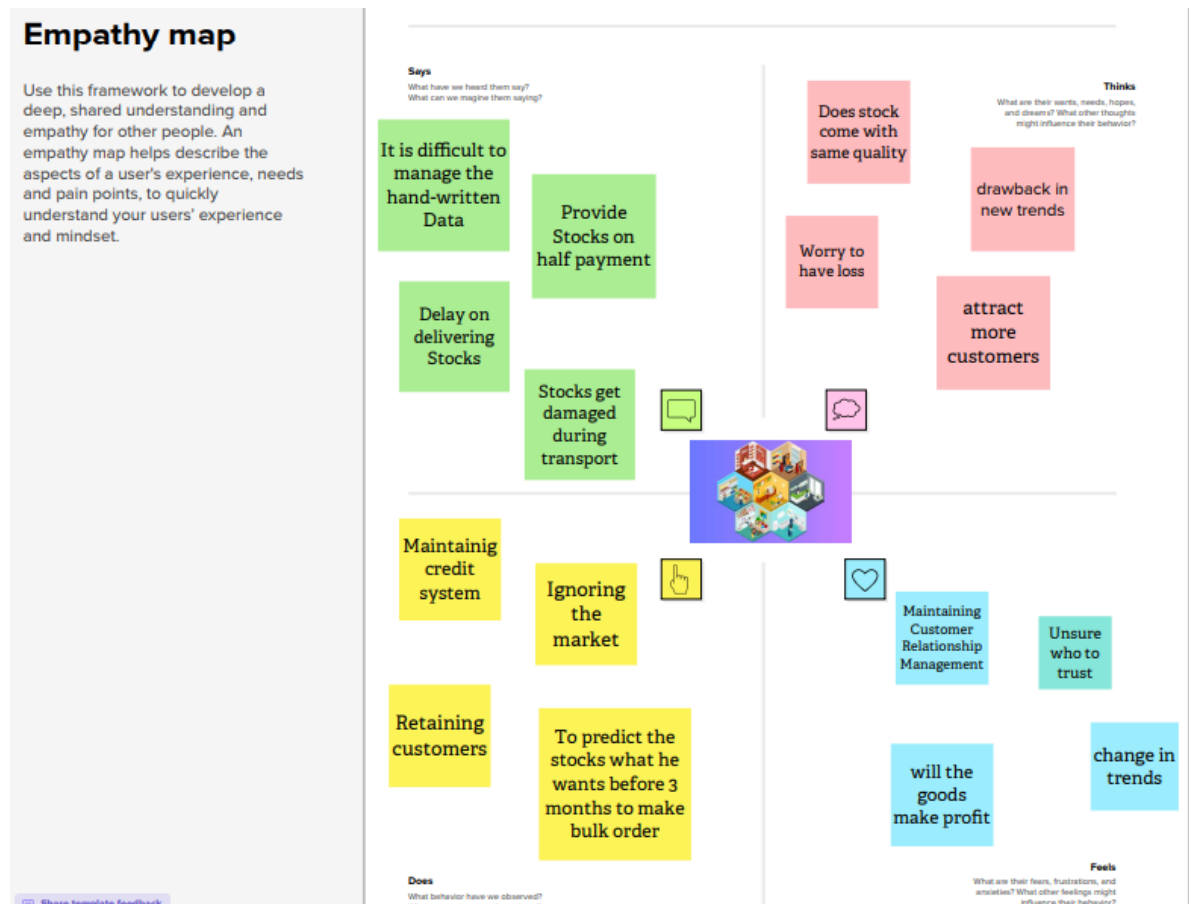
Retail management is a process that store leaders participate in to encourage sales, enhance store associates' performances and exceed customers' expectations. These practices aim to build customer loyalty and improve efficiency.

1.2 Purpose

By providing the application, the sales reps easily analyse the previous data and add the current data

2 Problem Definition & Design Thinking

2.1 Empathy Map



2.2 Ideation & Brainstorming

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.

- 10 minutes to prepare
- 1 hour to collaborate
- 2-3 people recommended

[View template feedback](#)

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.

- Team gathering: Before you start participating in the session with another table, share your information or you work about.
- Set the goal: Start defining problem you'll be focusing on solving in the brainstorming session.
- Learn how to use the facilitation tools: Use the Facilitation Experiences to run a happy and productive session.

[Open article](#)

Define your problem statement

For sales Reps, it is difficult to manage the stock availability in hand-written notes.

6 minutes

Problem

Maintaining credit system
Relating customers
Discount to your brands
ensure after the fact
Will the Goods make profit

Key rules of brainstorming

For an creative and productive session

- Keep it simple
- Encourage with ideas
- Make judgments
- Listen to others
- Go for volume
- If possible, be visual

Brainstorm

By providing the application, the sales rep easily manage the previous data and add the current data.

10 minutes

Person 1	Person 2	Person 3	Person 4
Provide applications manage the data	Choose some good goods	Get updated according to the trends	Sharing the trend
Attract more customers by giving discounts	Buy profitable goods	Analyze the ratings of the whole sales	Taking rating of a product early
By tracking the location of goods we can manage by suitable vehicle	Given more customers through ads	Showing credits and debts through the application	Maintaining a healthy relationship by being good staff

[View template feedback](#)

Group ideas

Provide applications manage the data
Attract more customers by giving discounts
Taking rating of a product early
Analyze the ratings of the whole sales

10 minutes

Decision making	Customer Relationship	Promotion
Organize your store	Train staff well	Display Attractive Ads
Listen to Employees	Offer clear communication	SMS Marketing
Get updated	Provide offers	Giving out coupons
		Sponsorship

[View template feedback](#)

Prioritize

Your team should all be active some people about what's important, moving forward. Place your ideas on this grid to determine which ideas are important and which are feasible.

10 minutes

[View template feedback](#)

After you collaborate

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

Quick add-ons

- Share the mind: Share your idea in the mind with other members of your team in the link about the session of the session.
- Export the mind: Export a mind map of the mind as a PDF or PNG to share with others in your team or your company.

Keep moving forward

- Weekly insights: Get the insights of the session on weekly.
- Customer experience journey map: Get the insights of the session on weekly, and share it with others.
- Weekly, continuous opportunities & insights: Get the insights of the session on weekly, and share it with others.

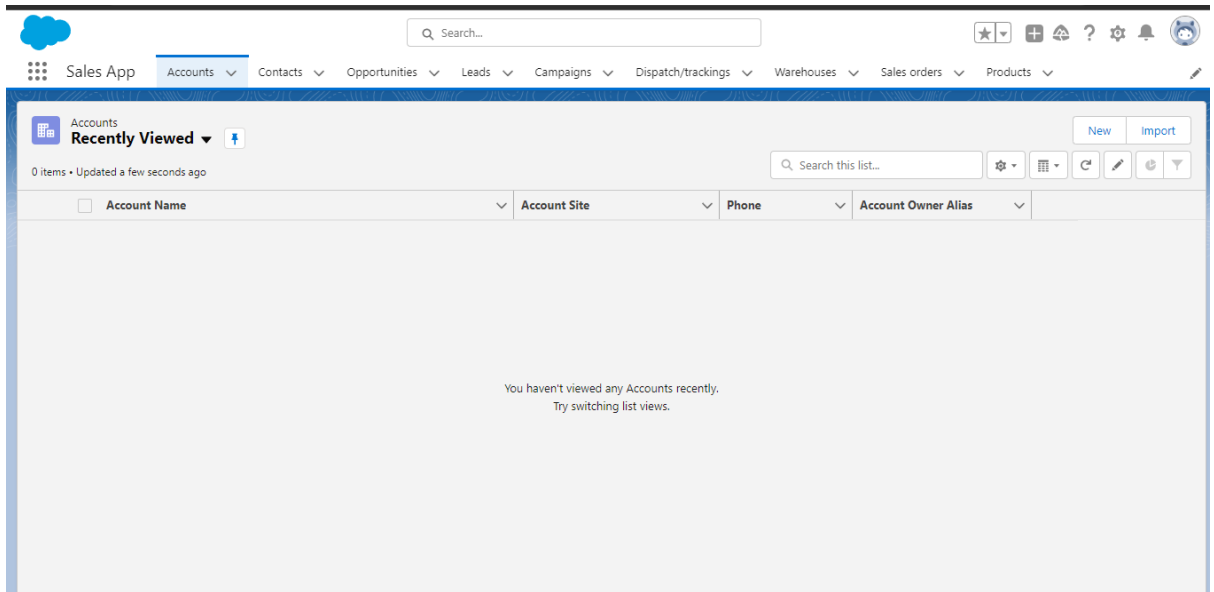
[View template feedback](#)

3 Result

3.1 Data Model

Object Name	Fields in the Object	
Dispatch & Tracking	Field Label	Data Type
	Dispatched	Check box
	Sales order	Check box
	Product name	Text
	Tracking Id	Text
	Expected date of delivery	Check box
Warehouse	Field Label	Data Type
	Ware name	Text
	Product name	Text
	Stock availability	Check box
Sales Order	Field Label	Data Type
	Sales Order Name	Text

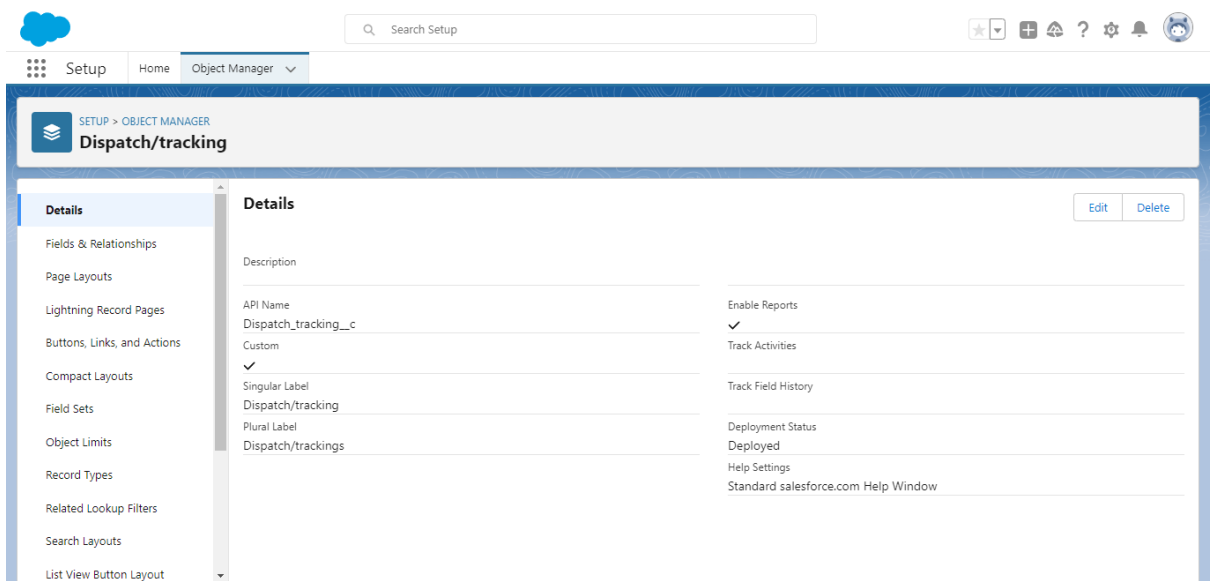
3.2 Activity & Screenshot



Apps in Salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo, and a particular An app is a collection of items that work together to serve a particular function.

Objects

Dispatch/Tracking



Warehouse

Setup

Home

Object Manager

Search Setup

Star

Plus

Refresh

Help

Settings

Notifications

User

SETUP > OBJECT MANAGER

Warehouse

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

Details

Description

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

Edit

Delete

Sales order

Setup

Home

Object Manager

Search Setup

Star

Plus

Refresh

Help

Settings

Notifications

User

SETUP > OBJECT MANAGER

Sales order

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

Details

Description

API Name Salesorder__c

Custom

✓

Singular Label Sales order

Plural Label Sales orders

Enable Reports

✓

Track Activities

Track Field History

Deployment Status Deployed

Help Settings

Standard salesforce.com Help Window

Edit

Delete

Fields

Setup

Home

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

Fields & Relationships

8 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Dispatched	Dispatched__c	Checkbox		
Expected date of delivery	Expected_date_of_delivery__c	Checkbox		
Last Modified By	LastModifiedById	Lookup(User)		
Order	Order__c	Master-Detail(Order)		
Product Name	Product_Name__c	Text(50) (Unique Case Insensitive)		
Sales order	Sales_order__c	Checkbox		
Tracking ID	Name	Text(80)		

Setup

Home

Object Manager

Warehouse

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

Fields & Relationships

6 Items, Sorted by Field Label

Quick Find


New

Deleted Fields







Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		
Product name	Product_name__c	Text(50) (Unique Case Insensitive)		
Stock availability	Stock_availability__c	Checkbox		
Ware Name	Name	Text(80)		



Search Setup



SetupHomeObject Manager

SETUP > OBJECT MANAGER

Sales order

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

Fields & Relationships


4 Items, Sorted by Field Label

Quick Find







NewDeleted FieldsField DependenciesSet History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Sales order Name	Name	Text(80)		✓

Layout



Search Setup



SetupHomeObject 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

Page Layouts

1 Items, Sorted by Page Layout Name

Quick Find

NewPage Layout Assignment

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Dispatch/tracking Layout	SUDALI SUDHA E, 28/03/2023, 11:30 am	SUDALI SUDHA E, 03/04/2023, 12:18 pm

User

The screenshot shows the Salesforce Setup interface for the 'Users' section. The left sidebar contains a search bar with 'user' and a list of navigation items: Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Users (highlighted), Feature Settings, Data.com, Prospector Users, User Interface, Action Link Templates, Actions & Recommendations, and App Menu. The main content area is titled 'Users' and includes a 'Help for this Page' link. Below the title, there is a 'View: All Users' dropdown and a 'Create New View' link. A table lists the following users:

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d2w000000rlnheal_xvfradpb3c2@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	E. SUDALI SUDHA	SE	sudha@arls.com		✓	System Administrator
<input type="checkbox"/> Edit	Navanitha Sudhava	snava	sudhava@science.com	Eastern Sales Team	✓	Standard User
<input type="checkbox"/> Edit	User Integration	integ	integration@00d2w000000rlnheal.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightssecurity@00d2w000000rlnheal.com		✓	Analytics Cloud Security User

At the bottom of the table, there are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'. A alphabetical navigation bar is visible at the bottom of the table.

Validation Rules

The screenshot shows the Salesforce Setup interface for the 'Validation Rules' section. The left sidebar contains a search bar with 'Search Setup' and a list of navigation items: Setup, Home, Object Manager, Account (highlighted), 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, and List View Button Layout. The main content area is titled 'Validation Rules' and includes a 'New' button. Below the title, there is a table with the following data:

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Phone_number_has_international_format	Phone	Phone number must begin with + (country code).	✓	SUDALI SUDHA E, 01/04/2023, 9:00 pm

At the bottom of the table, there is a dropdown arrow. A 'New' button is located at the top right of the table.

Cross Object

SetupHomeObject Manager

Search Setup

Star Plus Home ? Settings Bell Profile

Setup > OBJECT MANAGER

Contact

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

Contact Custom Field

Account_website

Back to Contact Fields

Help for this Page

Custom Field Definition Detail

EditSet Field-Level SecurityView Field AccessibilityWhere is this used?

Field Information

Field Label	Account_website	Object Name	Contact
Field Name	Account_website		
API Name	Account_website__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	SUDALI SUDHA E, 01/04/2023, 9:21 pm	Modified By	SUDALI SUDHA E, 01/04/2023, 9:21 pm

Formula Options

Data Type	Formula
-----------	---------

Account Website

Report

Search...

Star Plus Home ? Settings Bell Profile

Sales App

AccountsContactsOpportunitiesLeadsCampaignsDispatch/trackingsWarehouses

Product with stock availability

More

Report: Warehouses

Product with stock availability

Enable Field Editing

Search

Add Chart

Filter

Refresh

Edit

Total Records

6

Total Stock availability

5

Product name	Warehouse: Ware Name	Stock availability
- (1)	Test case-2	<input checked="" type="checkbox"/>
Subtotal		1
-(2) (1)	Passbook 1	<input type="checkbox"/>
Subtotal		0
Air conditioner (1) (1)	Hyderabad	<input checked="" type="checkbox"/>
Subtotal		1
Fan (1) (1)	Kolkata	<input checked="" type="checkbox"/>
Subtotal		1
Refrigerator (1)	Chennai	<input checked="" type="checkbox"/>
Subtotal		1
Washing Machine (1)	Mumbai	<input checked="" type="checkbox"/>
Subtotal		1

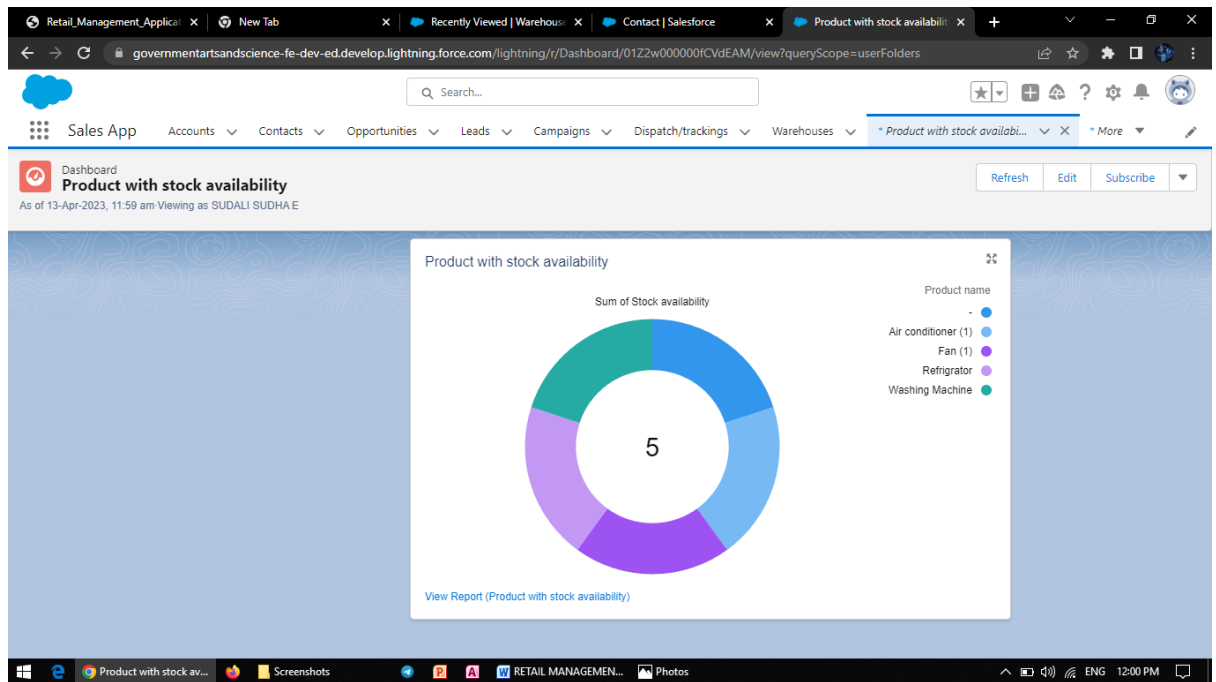
Row Counts

Detail Rows

Subtotals

Grand Total

Dashboard



4 Trailhead Profile public URL

Team leader - <https://trailblazer.me/id/sudae>

Team Member 1 - <https://trailblazer.me/id/saabi5>

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

Team Member 3 - <https://trailblazer.me/id/navat15>

5 Advantages & disadvantages

Advantages:

- This involves the way product are shown in the store
- The products are easily seen and accessed
- Ensuring that the customer demand is satisfied
- To make the retailers know what's working and what's isn't
- Any customer issues or gaps in stock are dealt with and are noted

Disadvantages:

- The rise of product price must be updated regularly

- Maintain the records and price as error free

6 Applications

- ✓ The application can be used in business areas merchandising store & digital channels.
- ✓ It connects the store with the banks

7 Conclusion

- ❖ The application provides stock and product price.
- ❖ Provide contact details, help the customers to track order,
- ❖ Provide stock availability information easy access to the product.

8 Future scope

- Keep the application updated up to date
- Keep track of customer purchases, Demands and experiences to make good customer relationship management
- Provide new version of the application by adding new features to it.