

# **Retail Management Application Using Salesforce**

## **1. Introduction**

### **1.1. Overview:**

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 fulfil 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.

### **1.2. Purpose:**

Retailing business can be started with less investment and less space

- Retailers can enjoy more profit margin
- Retailers can get trade credit facility

from suppliers which increases the liquidity in the business

- There will be no liability towards the - buyers
- It helps to increase customer relation and loyalty

## **2. Problem Definition & Design Thinking**

### **2.1. Empathy map**



Smart  
Internz



## Build empathy

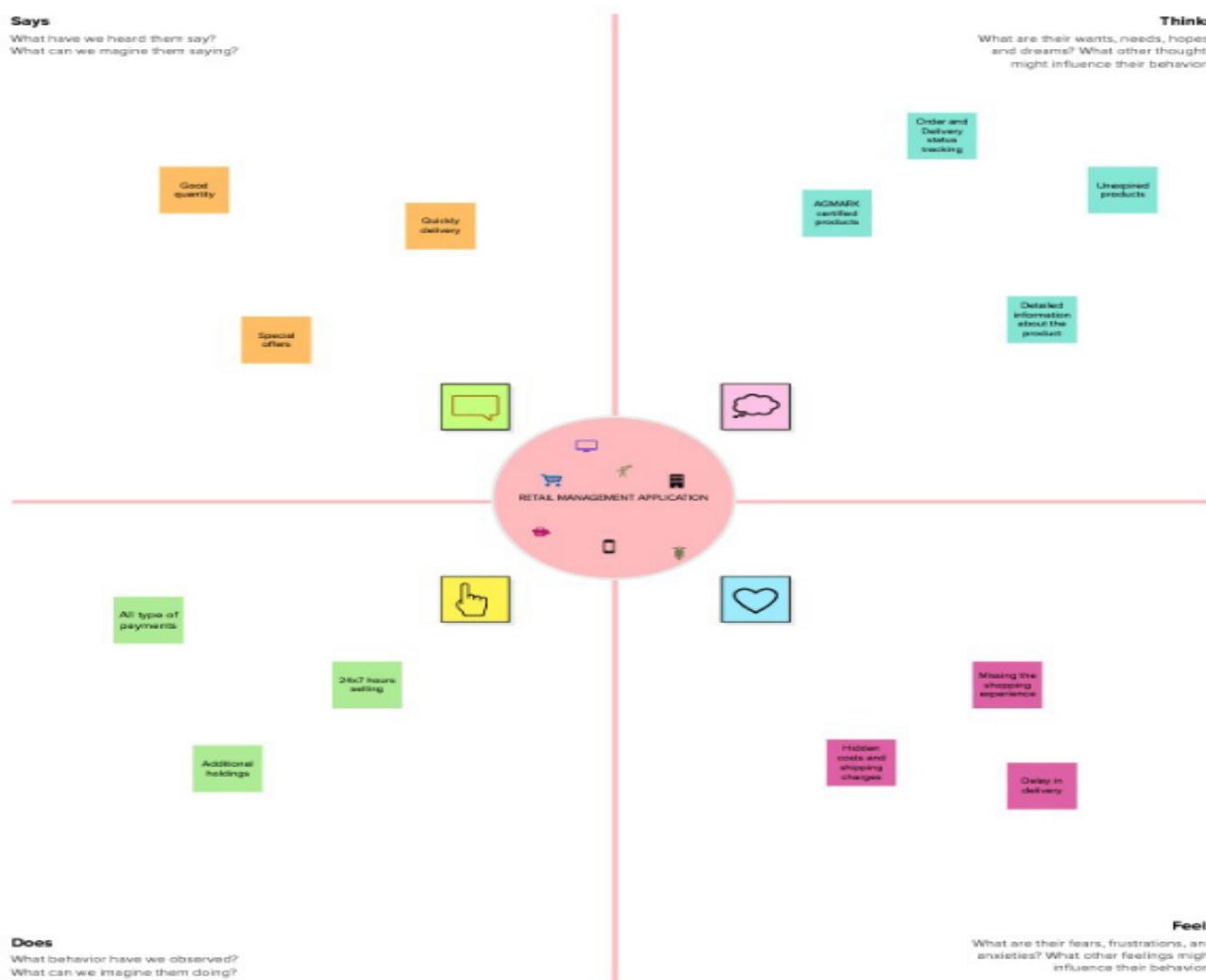
The information you add here should be representative of the observations and research you've done about your users.

### 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?

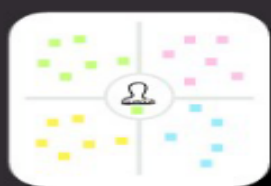
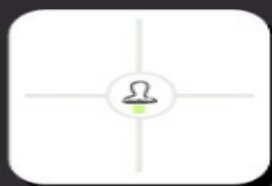


### Does







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

### Feels

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



## 2.2. Ideation & Brainstorming Map

### Brainstorm

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

0 minutes

**Problem Statement:** How can we help people with mental health issues find a job?

Category	Sub-category	Idea
PROBLEM STATEMENT	Issue	People with mental health issues often struggle to find a job.
	Challenge	Many people with mental health issues are unemployed.
	Goal	We want to help people with mental health issues find a job.
	Impact	Helping people with mental health issues find a job can improve their lives.
IDEAS	Idea	Create a job board specifically for people with mental health issues.
	Idea	Offer job training programs for people with mental health issues.
	Idea	Partner with employers to create job opportunities for people with mental health issues.
	Idea	Provide job coaching and support for people with mental health issues.
IMPLEMENTATION	Step 1	Research the needs of people with mental health issues.
	Step 2	Develop a job board or training program.
	Step 3	Partner with employers to create job opportunities.
	Step 4	Provide job coaching and support.
DEVELOPMENT/TESTING	Feature	Job board with filters for mental health issues.
	Feature	Job training program with mental health focus.
	Feature	Employer partnerships to create job opportunities.
	Feature	Job coaching and support services.

### Group ideas

Take turns sharing your ideas while clustering similar or related notes 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.

0 minutes

#### Health safety

People with mental health issues often struggle to find a job.

Many people with mental health issues are unemployed.

We want to help people with mental health issues find a job.

Helping people with mental health issues find a job can improve their lives.

#### Comfortable facility

People with mental health issues often struggle to find a job.

Many people with mental health issues are unemployed.

We want to help people with mental health issues find a job.

Helping people with mental health issues find a job can improve their lives.

#### Payment facility

People with mental health issues often struggle to find a job.

Many people with mental health issues are unemployed.

We want to help people with mental health issues find a job.

Helping people with mental health issues find a job can improve their lives.

#### Order and Delivery

People with mental health issues often struggle to find a job.

Many people with mental health issues are unemployed.

We want to help people with mental health issues find a job.

Helping people with mental health issues find a job can improve their lives.

#### Time

People with mental health issues often struggle to find a job.

Many people with mental health issues are unemployed.

We want to help people with mental health issues find a job.

Helping people with mental health issues find a job can improve their lives.

### Prioritize

Your team should all be on the same page about what's important moving forward. Place your ideas on the grid to determine which ideas are important and which are feasible.

20 minutes

**Importance**

1-5 (1 = most important, 5 = least important)

**Feasibility**

1-5 (1 = most feasible, 5 = least feasible)

**Grid:**

Idea	Importance	Feasibility
Job board with filters for mental health issues	4	3
Job training program with mental health focus	3	4
Employer partnerships to create job opportunities	5	2
Job coaching and support services	2	5
People with mental health issues often struggle to find a job	1	1
Many people with mental health issues are unemployed	1	1
We want to help people with mental health issues find a job	1	1
Helping people with mental health issues find a job can improve their lives	1	1

### 3. Result

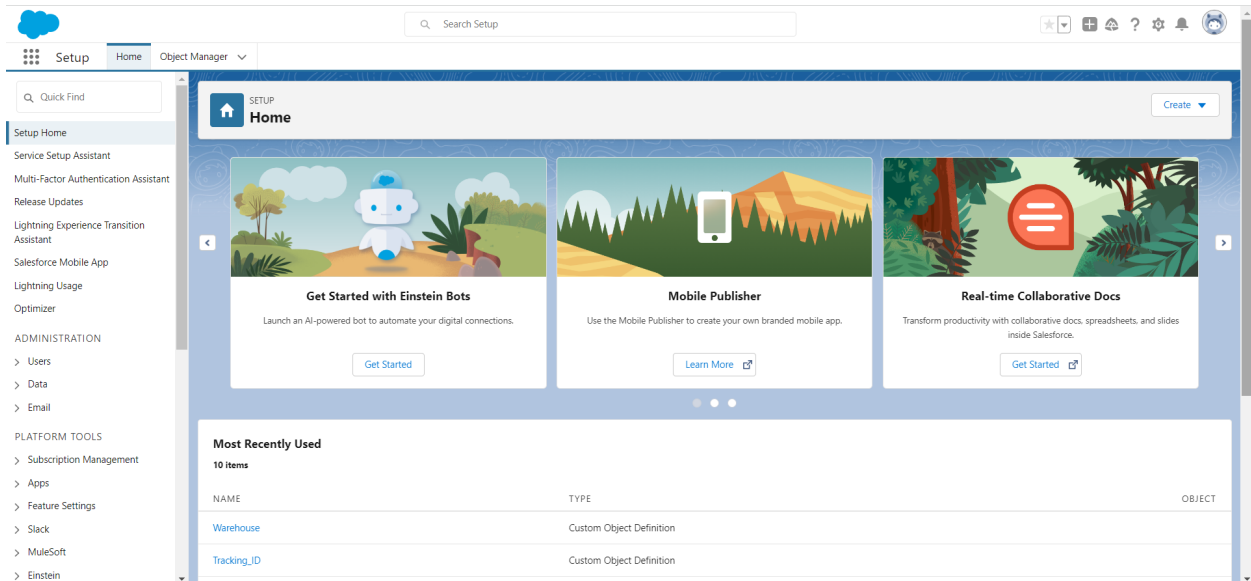
#### 3.1. Data Model

Application	Object Name	Fields in the Object (Data Type)
Sales App	Dispatch/Training	Text
	Sales Order	Text
	Accounts	Text
	Contacts	Text
	Warehouse	Text

Application	Object Name	Fields in the Object (Data Type)
Service App	Accounts	Text
	Cases	Text

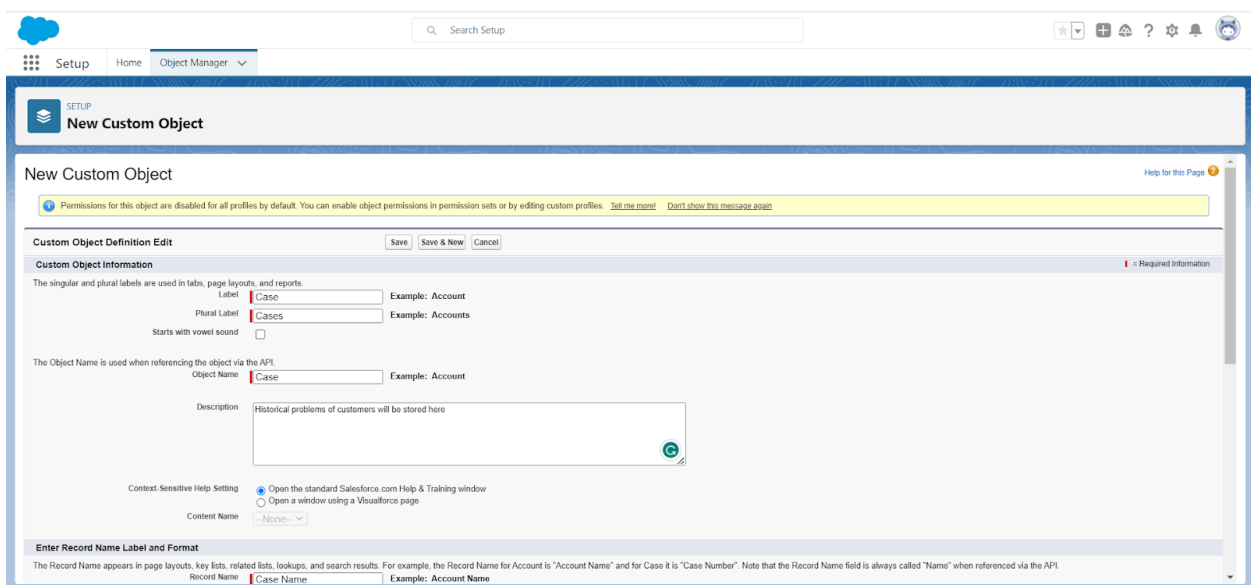
## 3.2. Activity Screenshot

### Milestone 1- creating developer's account

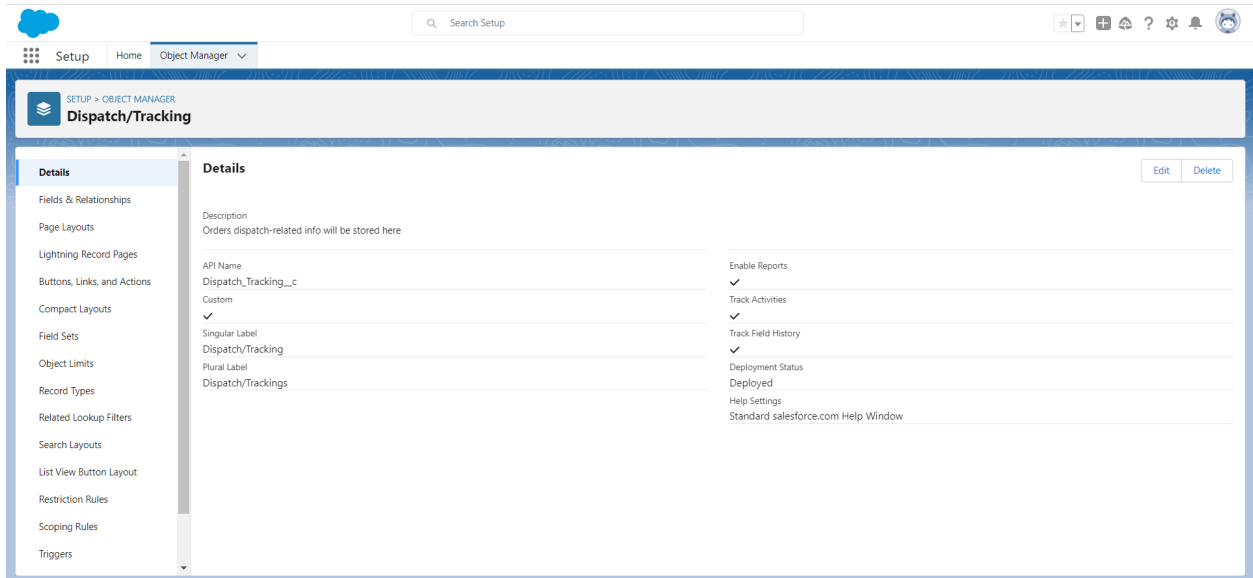


This is the home page that can be seen after logging in to the salesforce application.

### Milestone 2- Objects



Creation of object Case



**Dispatch/Tracking**

**Details**

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  
✓

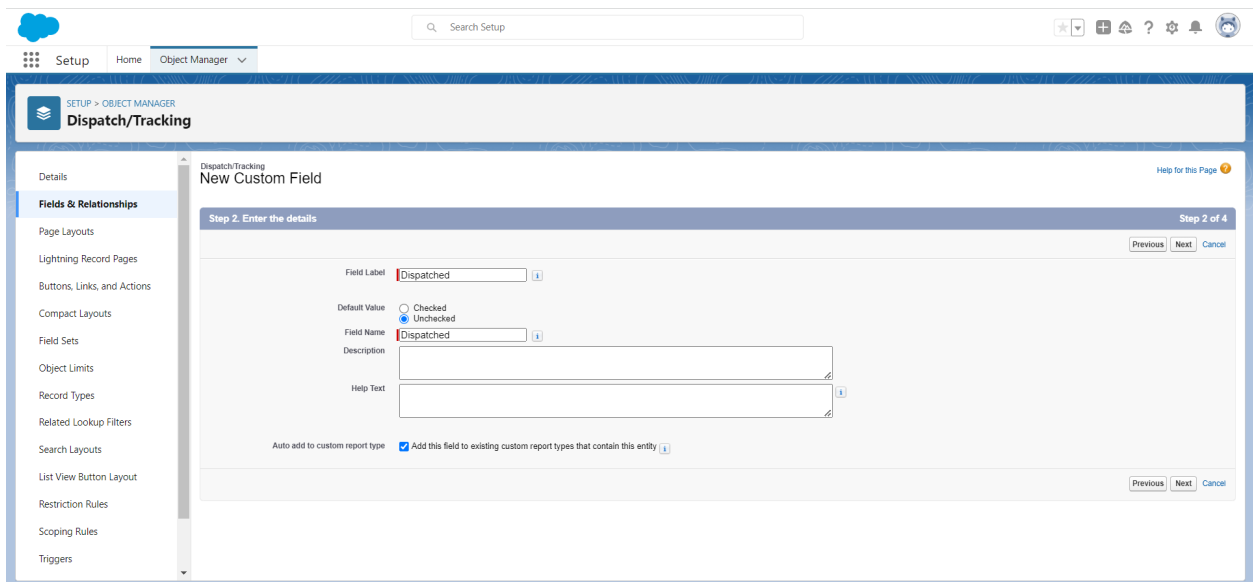
Track Field History  
✓

Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

Edit Delete

## Creation of Object Dispatch/Tracking



**Dispatch/Tracking**

**New Custom Field**

Step 2. Enter the details

Field Label  
Dispatched

Default Value  
☐ Checked  
☒ Unchecked

Field Name  
Dispatched

Description

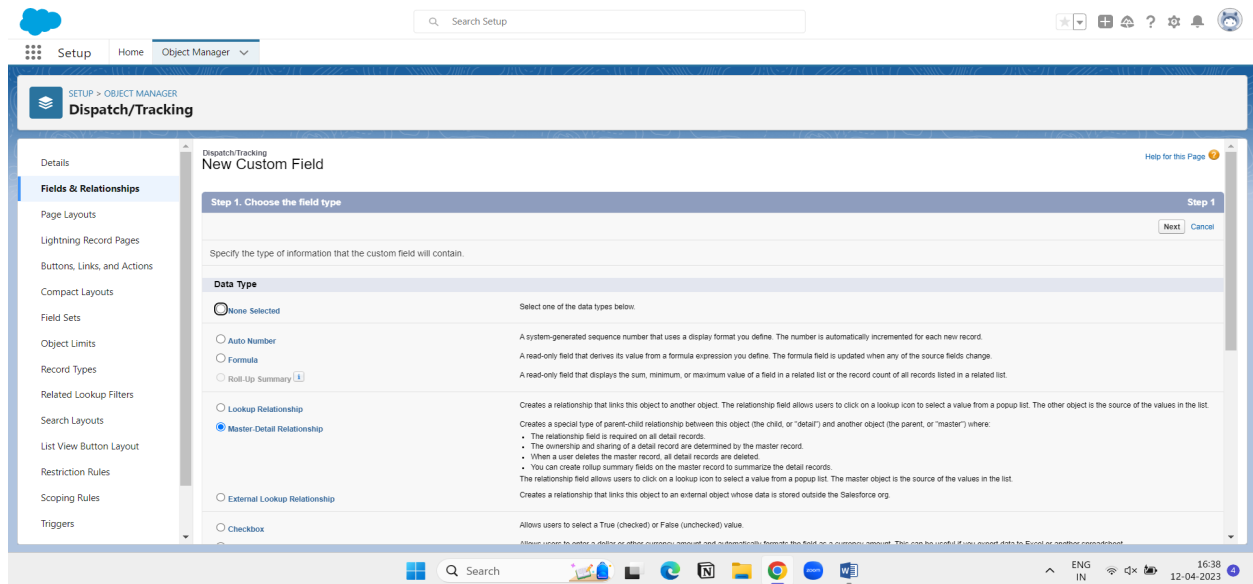
Help Text

Auto add to custom report type ☒ Add this field to existing custom report types that contain this entity

Previous Next Cancel

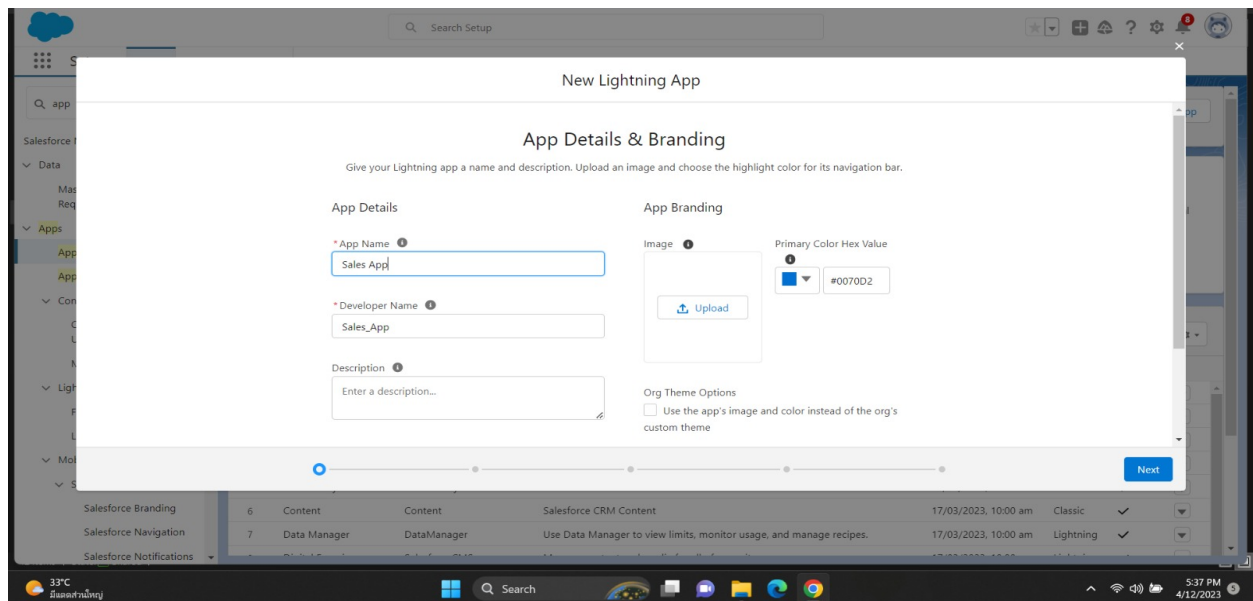
## Creation of fields on object Dispatch/Tracking

## Milestone 3- Relationship between Objects



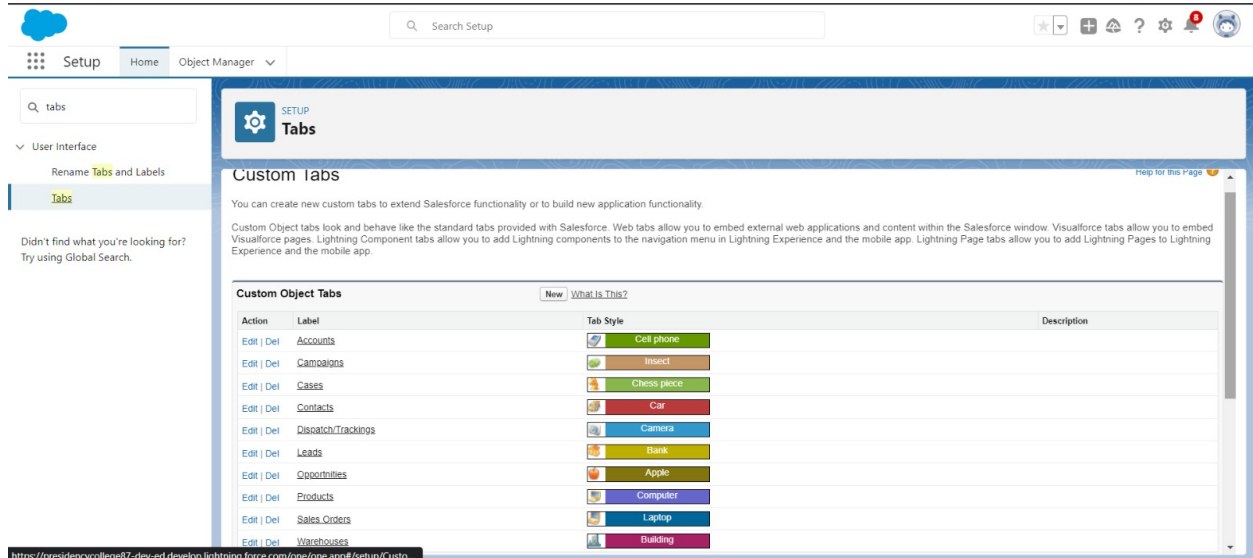
Creation of relationship between Dispatch/Tracking and Sales Order

## Milestone 4- Application



Creation of Sales App

## Milestone 5- Layouts



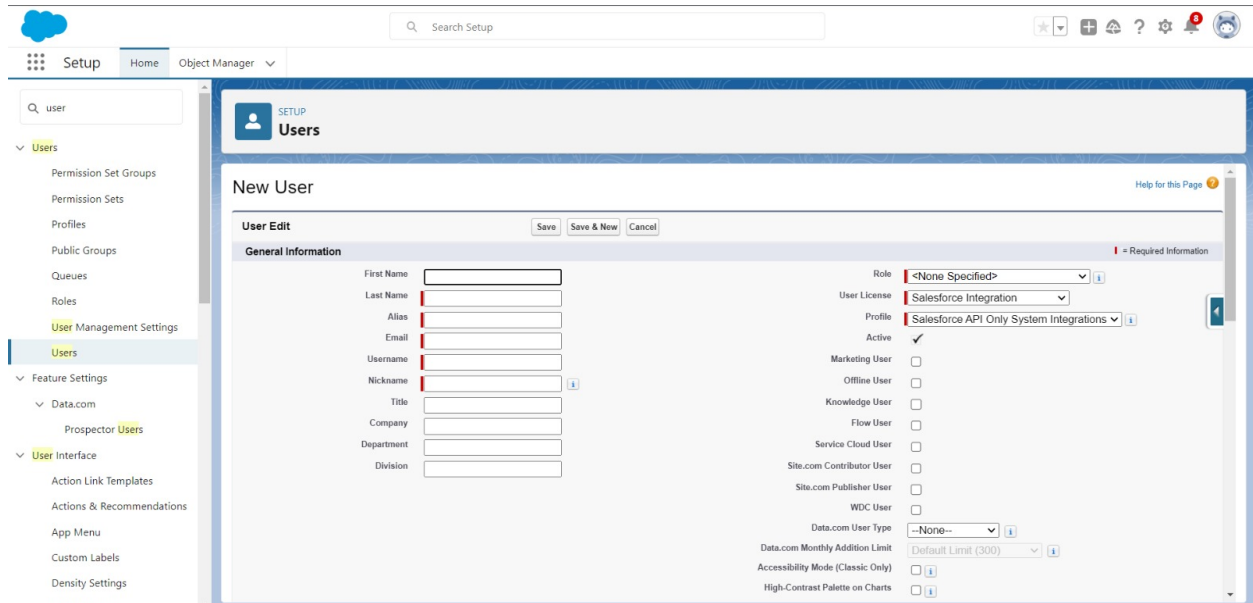
The screenshot shows the Salesforce Setup interface for the 'Custom Tabs' section. The left sidebar contains a search bar with 'tabs' and a list of navigation items under 'User Interface', including 'Rename Tabs and Labels' and 'Tabs'. The main content area is titled 'Custom Tabs' and includes a 'New' button and a 'What Is This?' link. Below this is a table of 'Custom Object Tabs' with columns for Action, Label, Tab Style, and Description. The table lists various objects like Accounts, Campaigns, Cases, Contacts, Dispatch/Trackings, Leads, Opportunities, Products, Sales Orders, and Warehouses, each with a corresponding tab style icon and name.

Action	Label	Tab Style	Description
Edit   Del	Accounts	Cell phone	
Edit   Del	Campaigns	Insect	
Edit   Del	Cases	Chess piece	
Edit   Del	Contacts	Car	
Edit   Del	Dispatch/Trackings	Camera	
Edit   Del	Leads	Bank	
Edit   Del	Opportunities	Apple	
Edit   Del	Products	Computer	
Edit   Del	Sales Orders	Laptop	
Edit   Del	Warehouses	Building	

https://presidencycollege87-dev-ed.develop.lightning.force.com/one/one.app#/setup/Custo...

## Creation of custom tabs

## Milestone 6- User

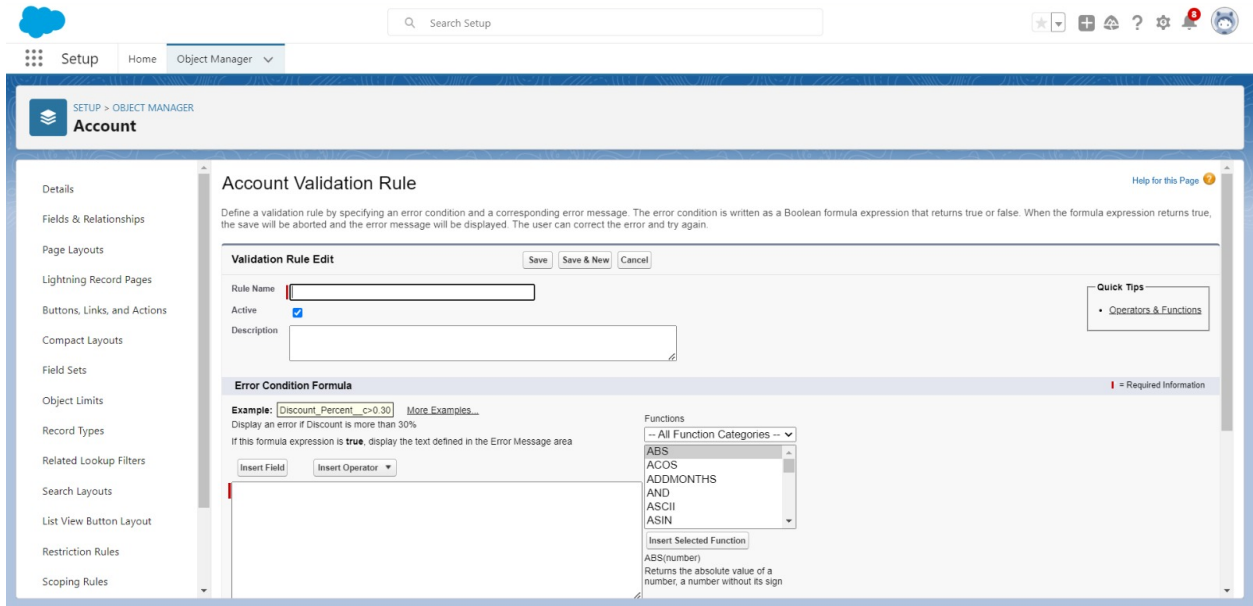


The screenshot shows the Salesforce Setup interface for the 'New User' page. The left sidebar contains a search bar with 'user' and a list of navigation items under 'Users', including 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', and 'Users'. The main content area is titled 'New User' and includes a 'User Edit' section with 'Save', 'Save & New', and 'Cancel' buttons. Below this is a 'General Information' section with fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. To the right of these fields are dropdown menus for Role (set to '<None Specified>'), User License (set to 'Salesforce Integration'), and Profile (set to 'Salesforce API Only System Integrations'). There are also checkboxes for Active, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Data.com User Type (set to '-None-'), Data.com Monthly Addition Limit (set to 'Default Limit (300)'), Accessibility Mode (Classic Only), and High-Contrast Palette on Charts.

## Creation of user



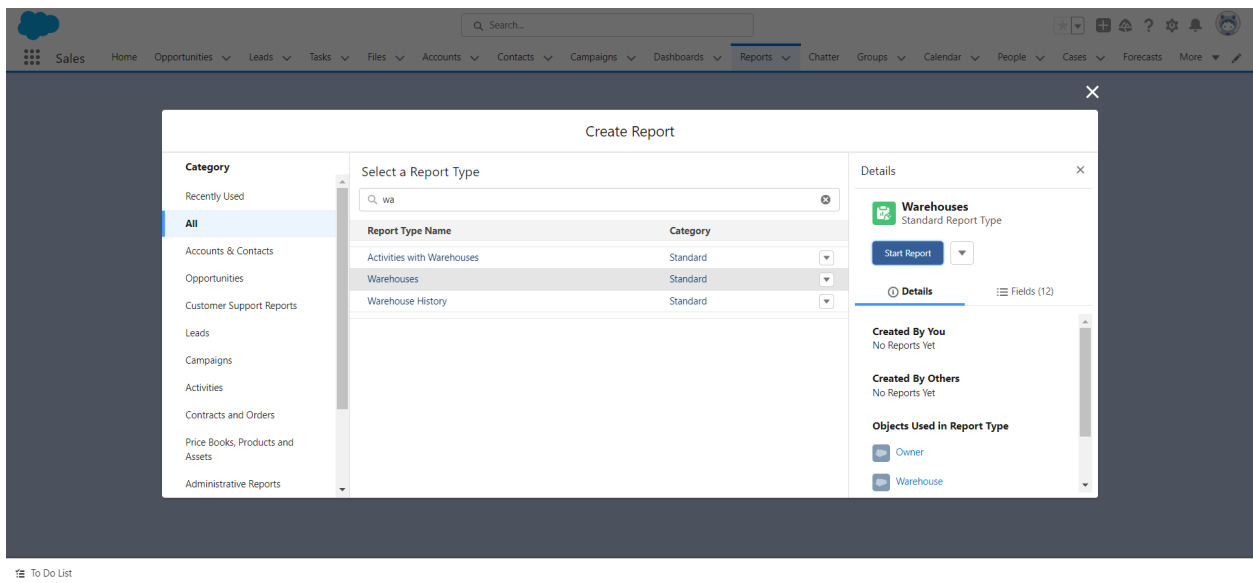
## Milestone 7- Validation Rules



The screenshot shows the 'Account Validation Rule' setup page in Salesforce. The page is titled 'Account Validation Rule' and includes a 'Validation Rule Edit' section with fields for 'Rule Name', 'Active' (checked), and 'Description'. Below this is the 'Error Condition Formula' section, which includes an example formula: `Discount_Percent_c > 0.30`. A 'Functions' dropdown menu is open, showing a list of functions including ABS, ACOS, ADDMONTHS, AND, ASCII, and ASIN. The 'Details' sidebar on the left lists various setup options like 'Fields & Relationships', 'Page Layouts', and 'Object Limits'.

Creation of validation rules for Account object

## Milestone 8- Reports



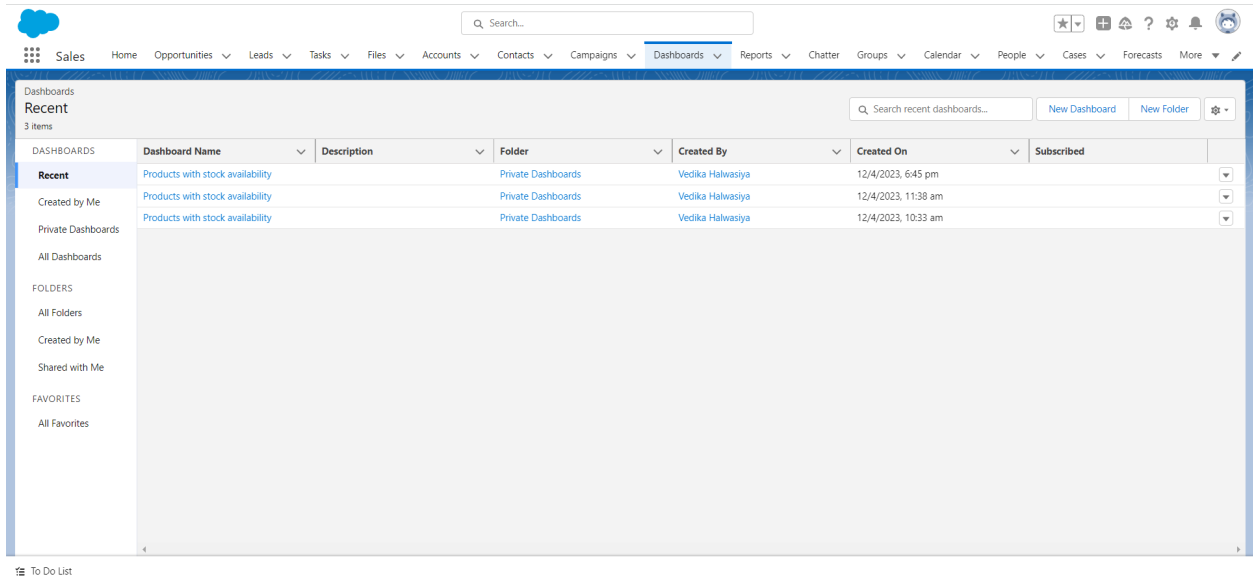
The screenshot shows the 'Create Report' dialog in Salesforce. The 'Category' dropdown is set to 'All'. The 'Select a Report Type' section displays a table of report types:

Report Type Name	Category
Activities with Warehouses	Standard
Warehouses	Standard
Warehouse History	Standard

The 'Details' section on the right shows the 'Warehouses' report type selected, with a 'Start Report' button and a 'Details' link. Below this, it shows 'Created By You' (No Reports Yet), 'Created By Others' (No Reports Yet), and 'Objects Used in Report Type' (Owner, Warehouse).

Creation of report on warehouse

## Milestone 9- Dashboards



The screenshot shows the Salesforce Dashboards page. The top navigation bar includes links for Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards (selected), Reports, Chatter, Groups, Calendar, People, Cases, Forecasts, and More. A search bar is located in the top right. The main content area displays a list of recent dashboards under the 'Recent' tab. The list has columns for Dashboard Name, Description, Folder, Created By, Created On, and Subscribed. Three dashboards are listed, all named 'Products with stock availability' and created by 'Vedika Halwasiya'.

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Products with stock availability		Private Dashboards	Vedika Halwasiya	12/4/2023, 6:45 pm	
Created by Me	Products with stock availability		Private Dashboards	Vedika Halwasiya	12/4/2023, 11:38 am	
Private Dashboards	Products with stock availability		Private Dashboards	Vedika Halwasiya	12/4/2023, 10:33 am	

Creation of dashboard for the report

## 4. Trailhead Profile Public URL

Team Leader: <https://trailblazer.me/id/umamg6>

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

Team Member 2: <https://trailblazer.me/id/aruvi143>

Team Member 3: <https://trailblazer.me/id/deepm810>

## 5. Advantages and Disadvantages

### Advantages:

Less capital Recruitment  
More profite Margin  
Credit facilit  
Better c ustomer relations  
No liability

### Disadvantages:

1. High marketing cost
2. Selling skill Required
3. Very high competition
4. No economics of buying

## 6. Applications

Applications of Retail Management Application are:

- Inventory control
- Point of Sale (POS)
- Marketing
- Management of customer loyalty

## 7. Conclusion

It consumes high marketing expenses -  
Retailers have to face high competition  
in the market

- There will be no economies of buying
- It requires better selling and marketing skills to run retail business

## 8. Future Scope

Can offer convenience, speed, and personalized customer service without needing to stock every item. However, since shoppers know that the odds of these retailers carrying everything they want are low, store owners and managers need to make the shopping experience convenient, easy, simple, and pleasurable.