

Retail Management Application Using Salesforce

1.1 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

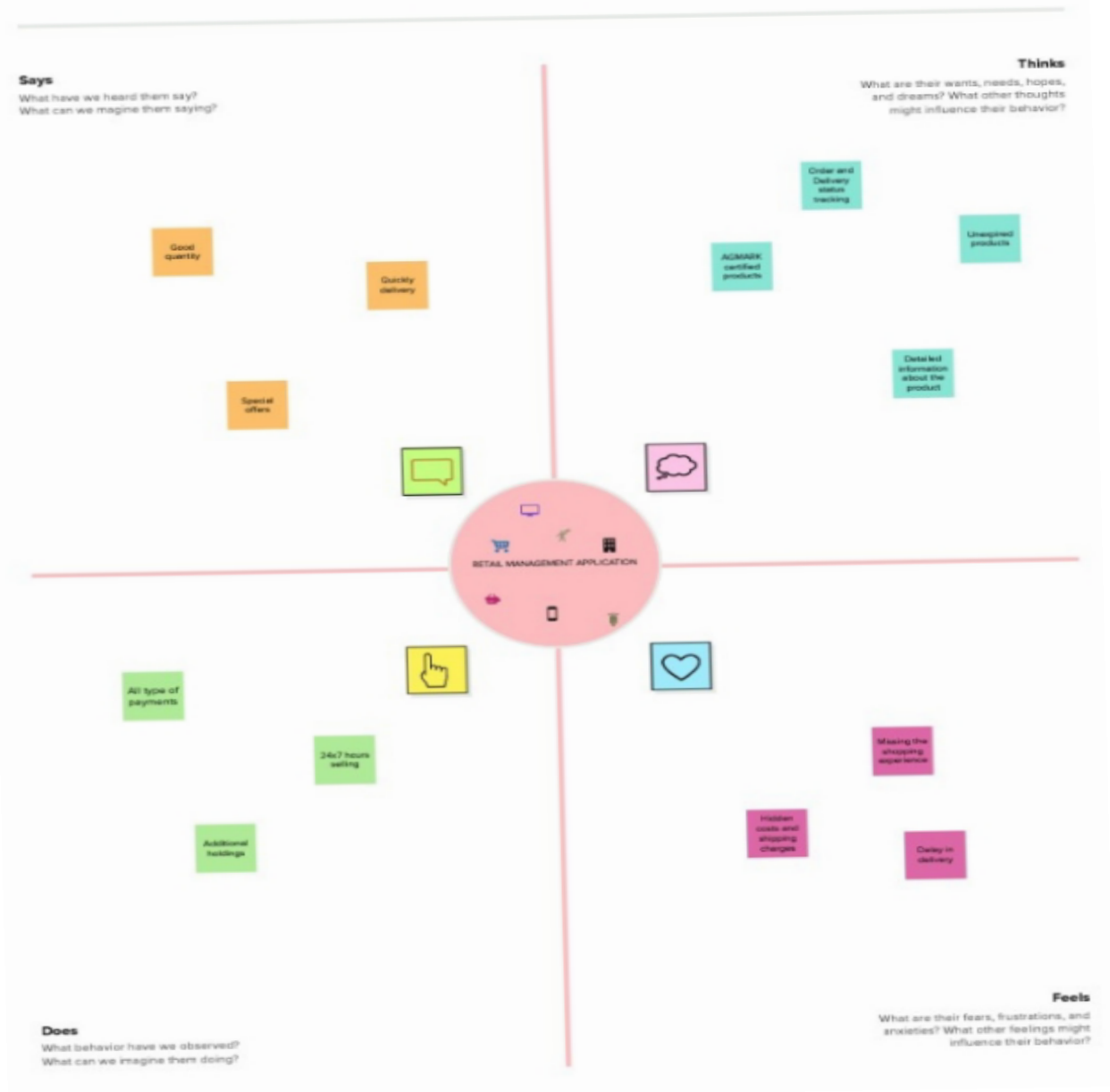
- It helps to increase customer relation and loyalty

2. Problem Definition & Design Thinking

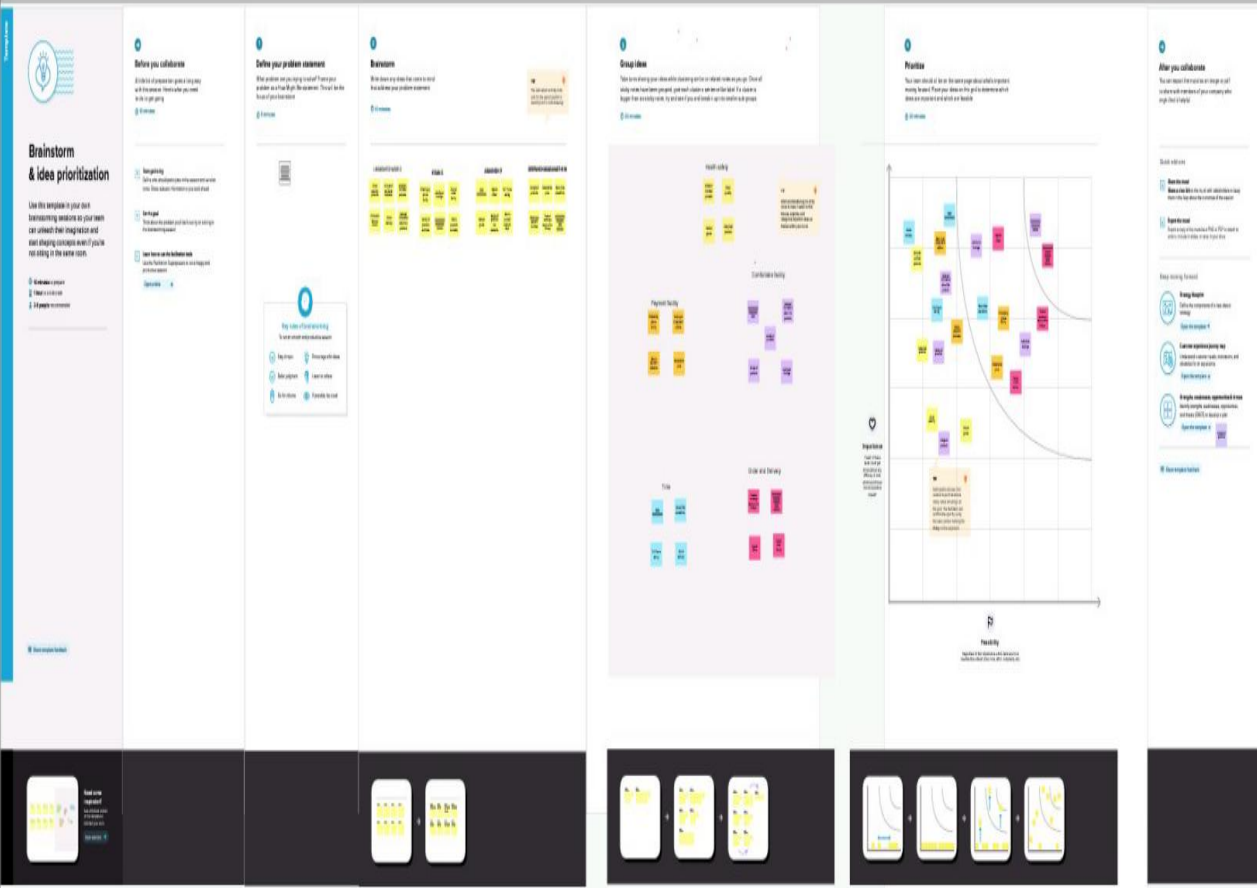
2.1. Empathy map

Build empathy

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



2.2. Ideation & Brainstorming Map



Before you ideate

It's time to get your ideas flowing. Before you start, make sure you have a clear understanding of the problem you're trying to solve. This will help you generate more relevant and useful ideas.

Define your problem statement

What problem are you trying to solve? What are your goals? What are the constraints? This will help you focus your brainstorming efforts on the most relevant and useful ideas.

Brainstorm

It's time to get your ideas flowing. Write down as many ideas as you can, no matter how silly or outrageous they seem. The goal is to generate a large number of ideas, so you can then filter them down to the most relevant and useful ones.

Organize

Now that you have a large number of ideas, it's time to organize them. Group them into categories, and then prioritize them based on their relevance and usefulness. This will help you focus your efforts on the most important ideas.

Prioritize

Now that you have organized your ideas, it's time to prioritize them. Use a bubble chart to rank your ideas based on their relevance and usefulness. This will help you focus your efforts on the most important ideas.

After you ideate

Now that you have prioritized your ideas, it's time to implement them. Create a plan of action, and then work on implementing your ideas. This will help you turn your ideas into reality.

Brainstorm & idea prioritization

Use this template to brainstorm and prioritize your ideas. Write down as many ideas as you can, and then rank them based on their relevance and usefulness. This will help you focus your efforts on the most important ideas.

Next steps

- 1. Define the problem
- 2. Brainstorm ideas
- 3. Organize ideas
- 4. Prioritize ideas
- 5. Implement ideas

Feedback

- 1. How many ideas did you generate?
- 2. How many ideas did you prioritize?
- 3. How many ideas did you implement?
- 4. How many ideas did you reject?
- 5. How many ideas did you refine?

3. Result

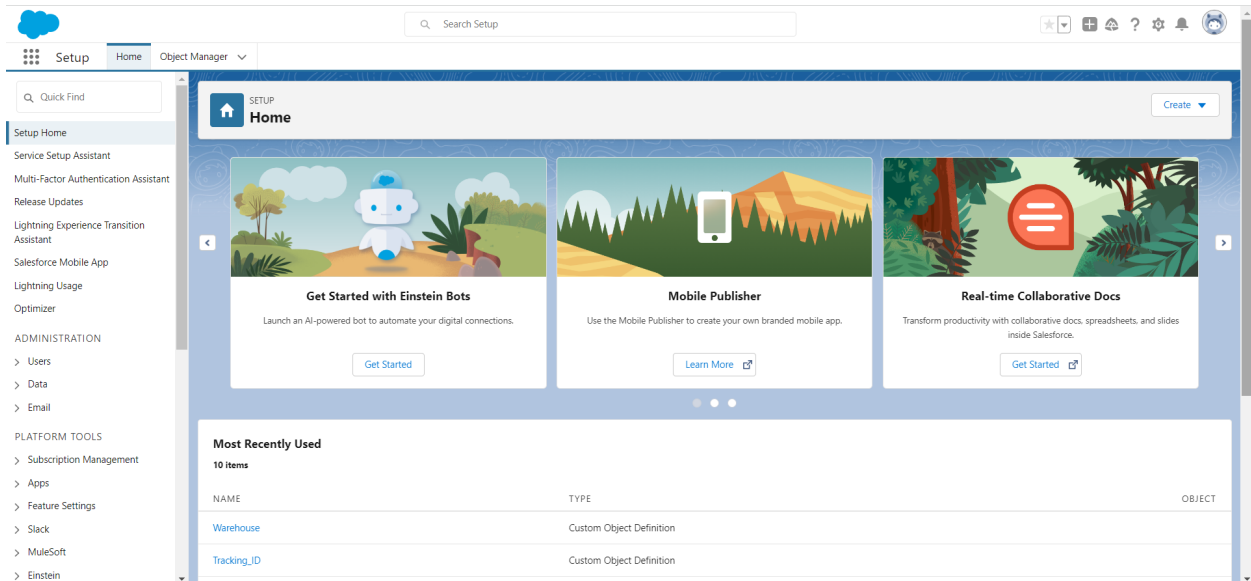
3.1. Data Model

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

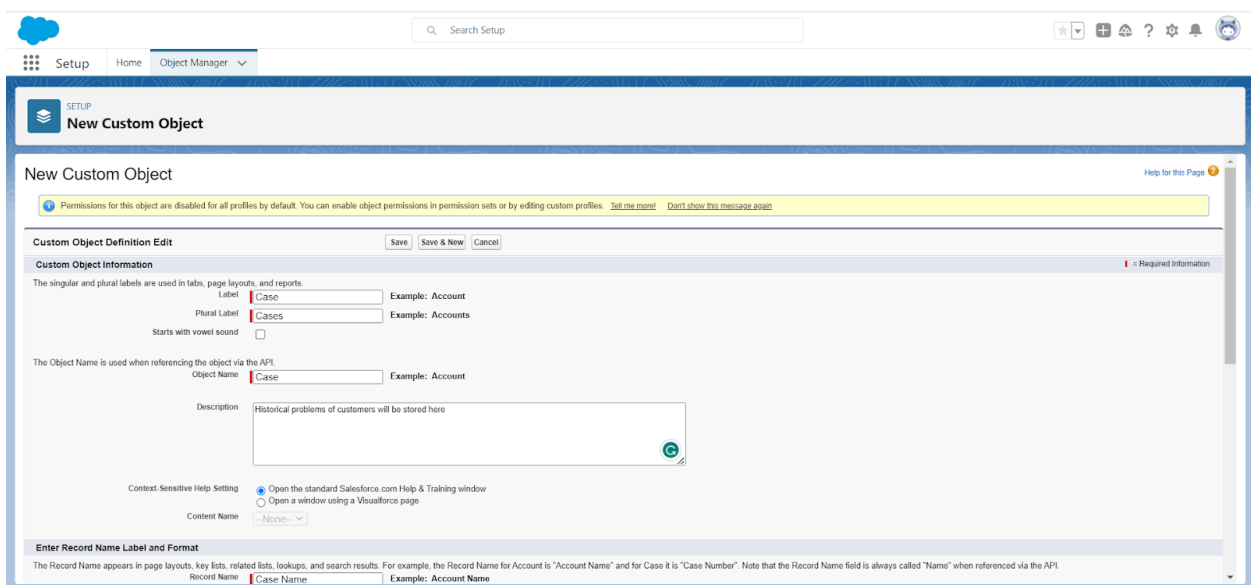
3.2. Activity Screenshot

Milestone 1- creating developer's account

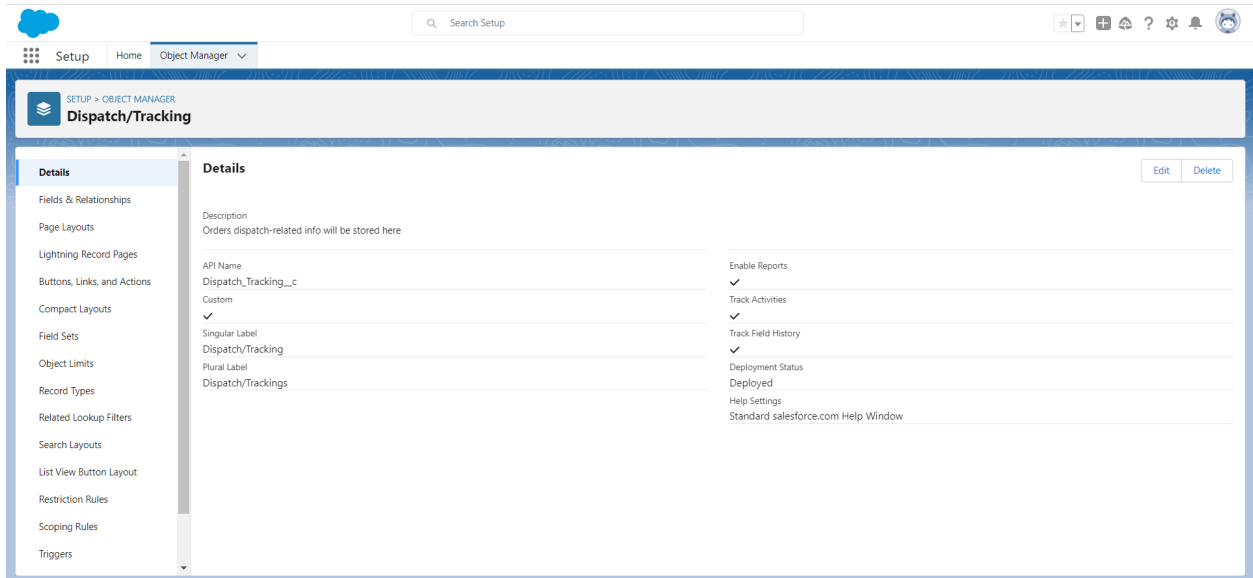


This is the home page that can be seen after logging in to the salesforce application.

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
✓

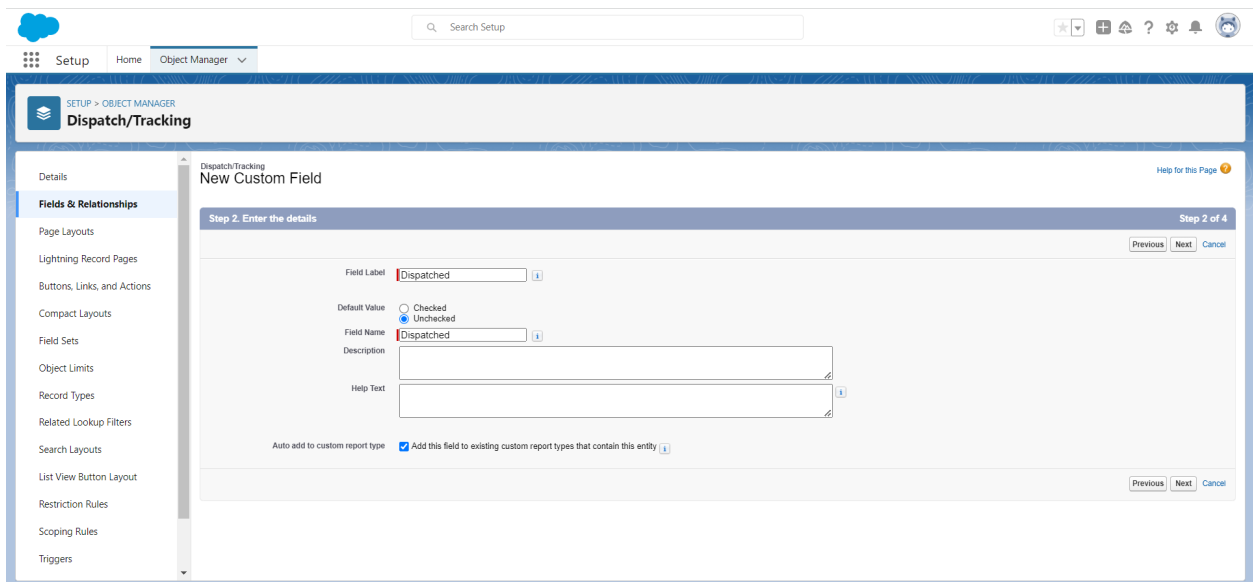
Track Field History
✓

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

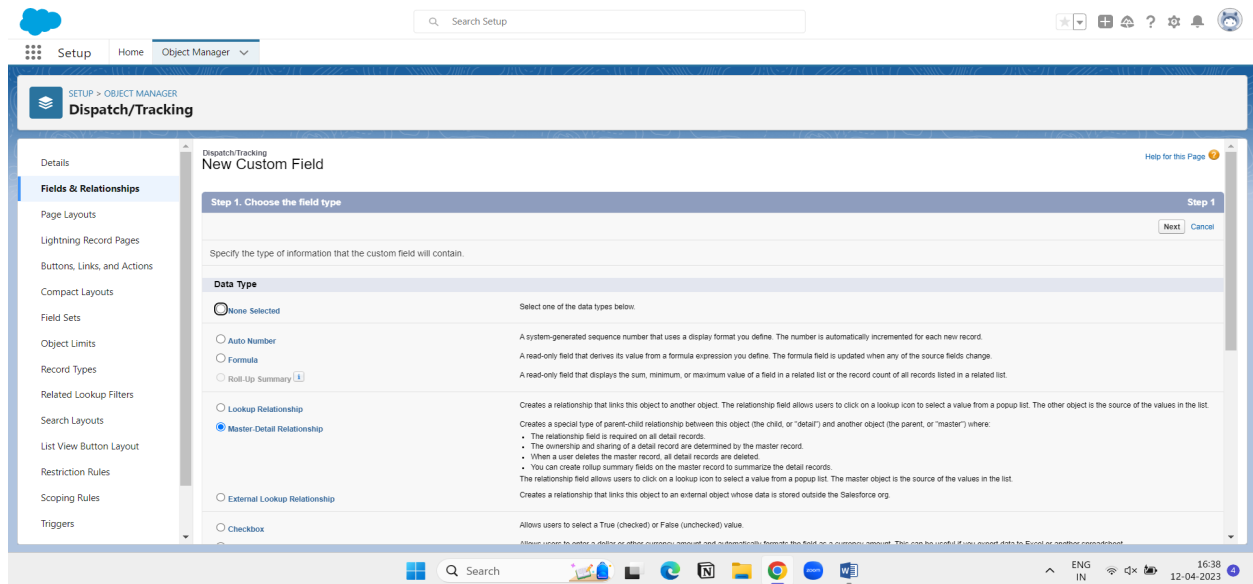
Help Text

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

Previous Next Cancel

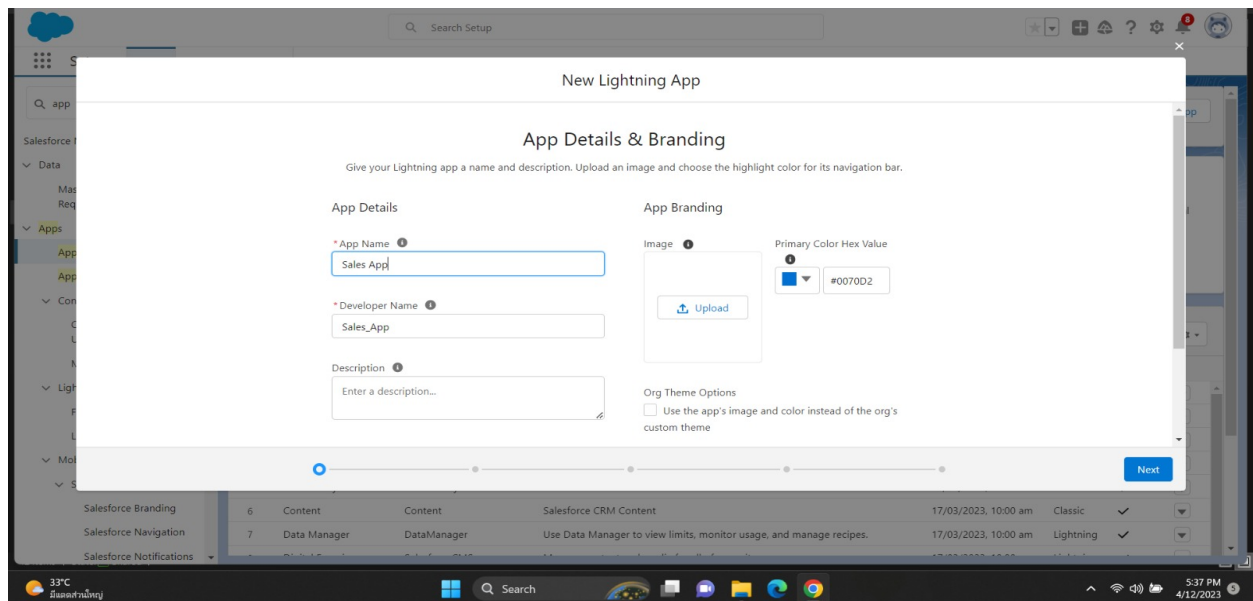
Creation of fields on object Dispatch/Tracking

Milestone 3- Relationship between Objects



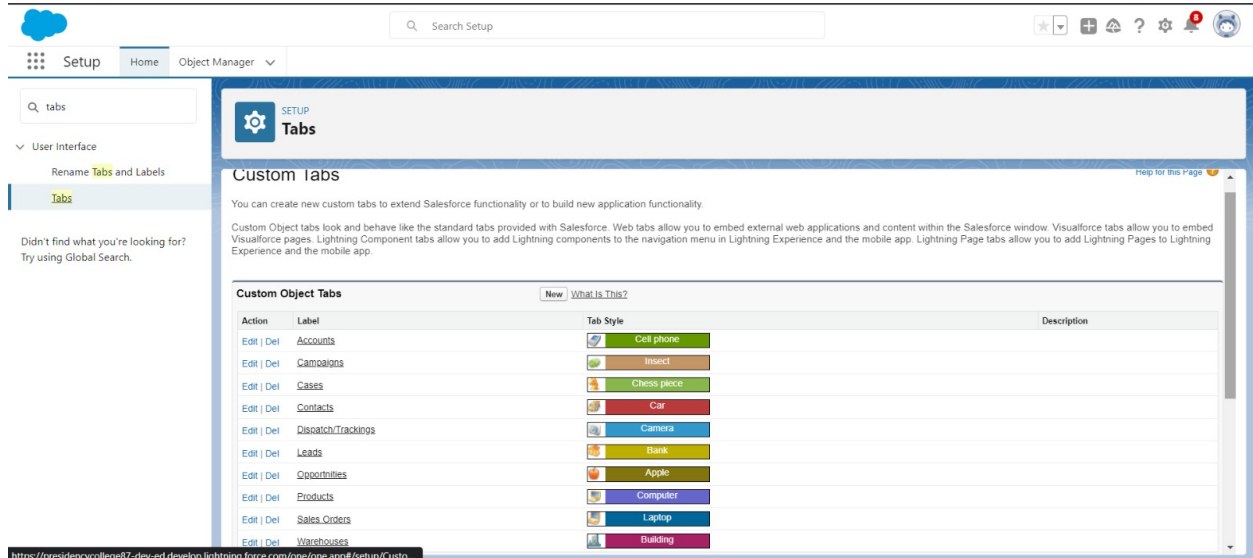
Creation of relationship between Dispatch/Tracking and Sales Order

Milestone 4- Application



Creation of Sales App

Milestone 5- Layouts



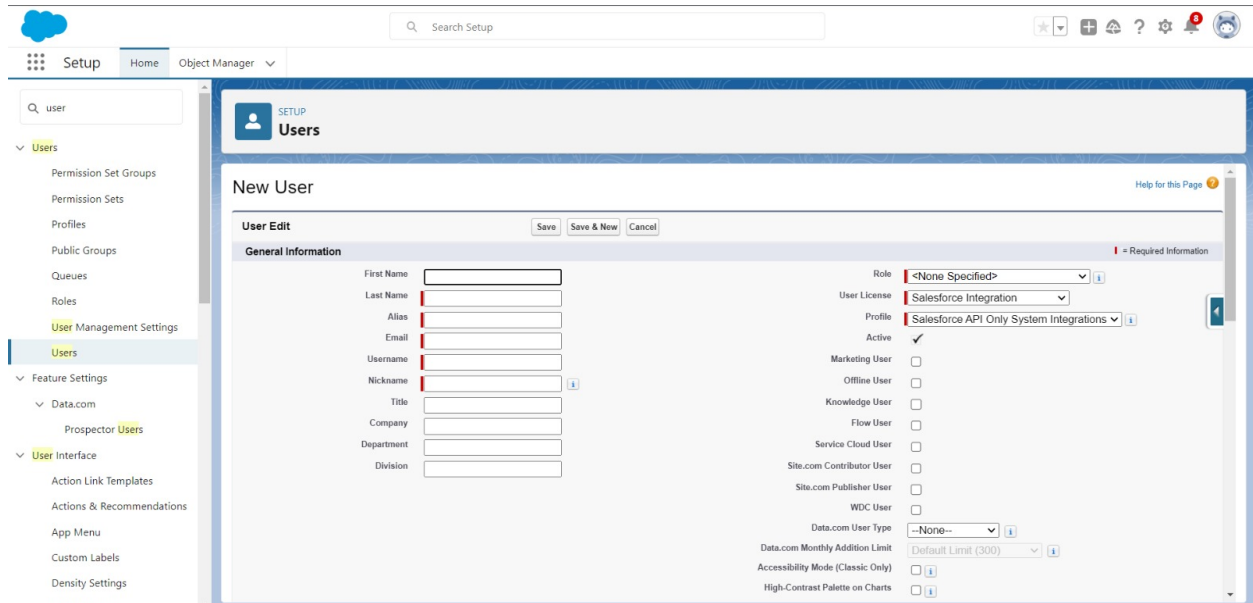
The screenshot shows the Salesforce Setup interface for the 'Custom Tabs' section. The left sidebar contains a search bar with 'tabs' and a list of navigation items under 'User Interface', including 'Rename Tabs and Labels' and 'Tabs'. The main content area is titled 'Custom Tabs' and includes a 'New' 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

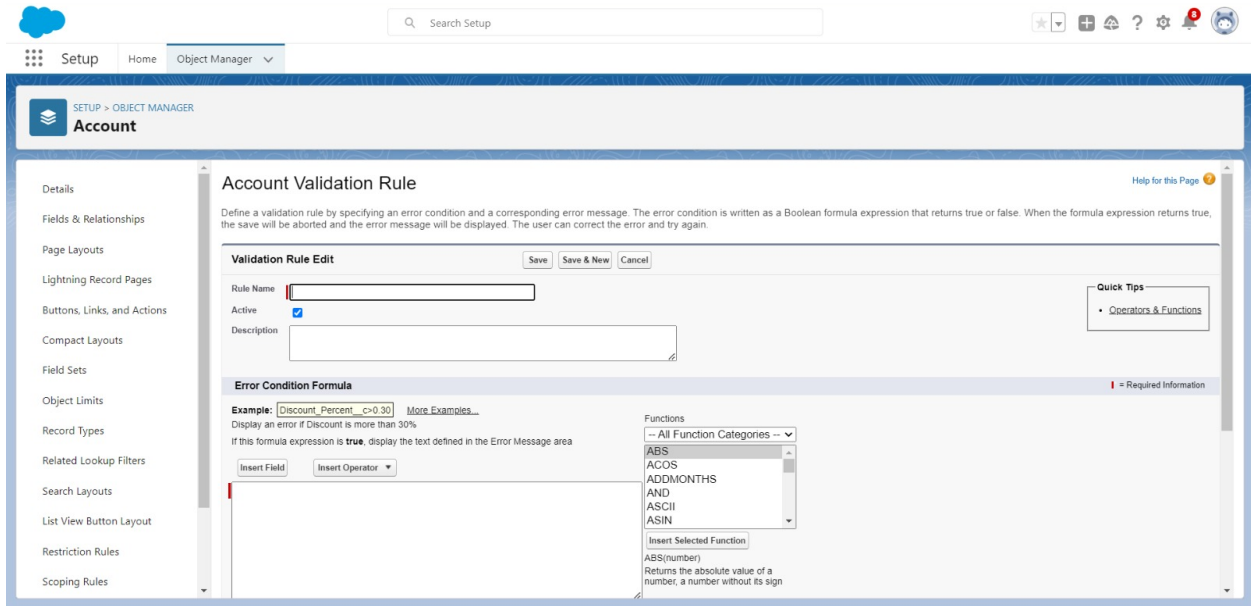
Milestone 6- User



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', and 'Data.com User Type' (set to '-None-'). A 'Data.com Monthly Addition Limit' dropdown is set to 'Default Limit (300)'. At the bottom, there are checkboxes for 'Accessibility Mode (Classic Only)' and 'High-Contrast Palette on Charts'.

Creation of user

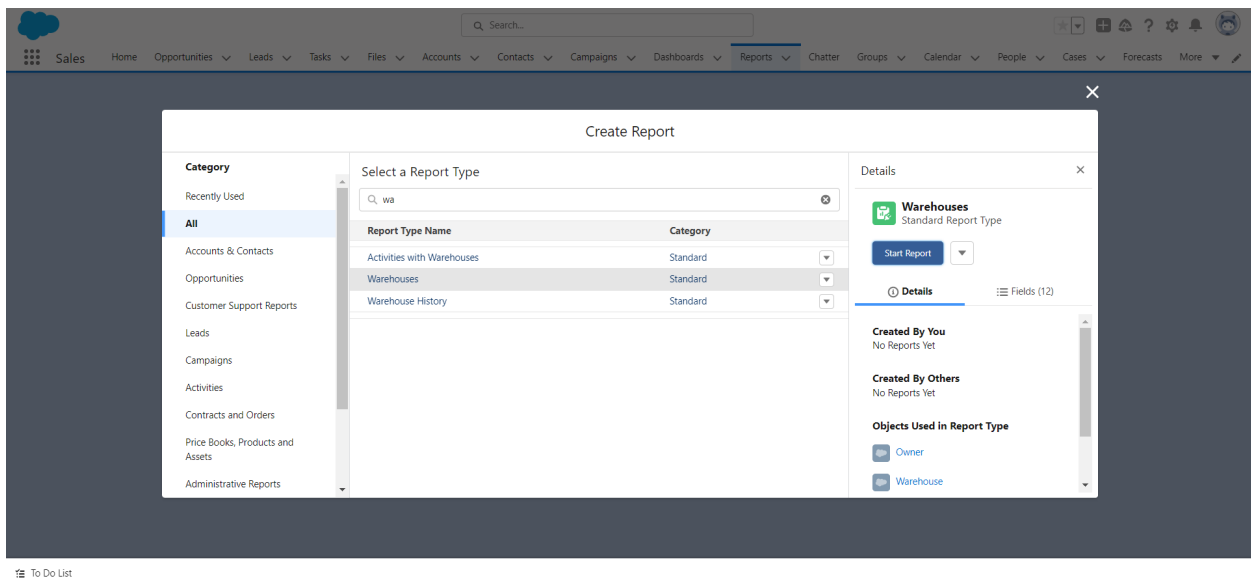
Milestone 7- Validation Rules



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



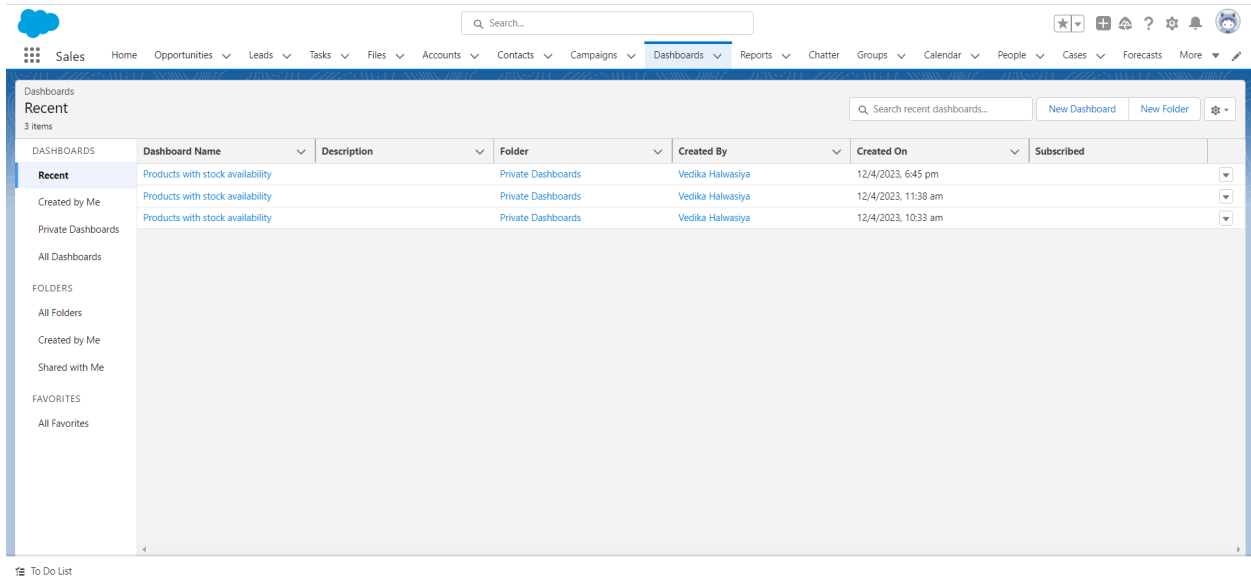
The screenshot shows the 'Create Report' dialog in Salesforce. The 'Category' dropdown is set to 'All'. The 'Select a Report Type' section displays a table of report types:

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 left sidebar contains navigation links: DASHBOARDS, FOLDERS, and FAVORITES. The main content area displays a table of recent dashboards.

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.](https://trailblazer.me/id/strailhead)

[me/id/strailhead](https://trailblazer.me/id/strailhead)

Team Member 2: [https://trailblazer.](https://trailblazer.me/id/aruvi143)

[me/id/aruvi143](https://trailblazer.me/id/aruvi143)

Team Member 3: [https://trailblazer.](https://trailblazer.me/id/deepm810)

[me/id/deepm810](https://trailblazer.me/id/deepm810)

5. Advantages and Disadvantages

Advantages:

Less capital Recruitment

More profit Margin

Better customer relations

No liability

Credit Facility

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.