

RETAIL MANAGEMENT APPLICATION USING SALESFORCE

1. INTRODUCTION:

1.1 OVERVIEW:

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 simple words, retail management helps customers shop without any difficulty.

Retail management refers to successfully running and managing the internal functions of a retail store. It comes from extensive planning and having an understanding of the target demographic. Retail management teaches about inventory management and supply management, where it conveys various techniques to optimize the entire retailing operations.

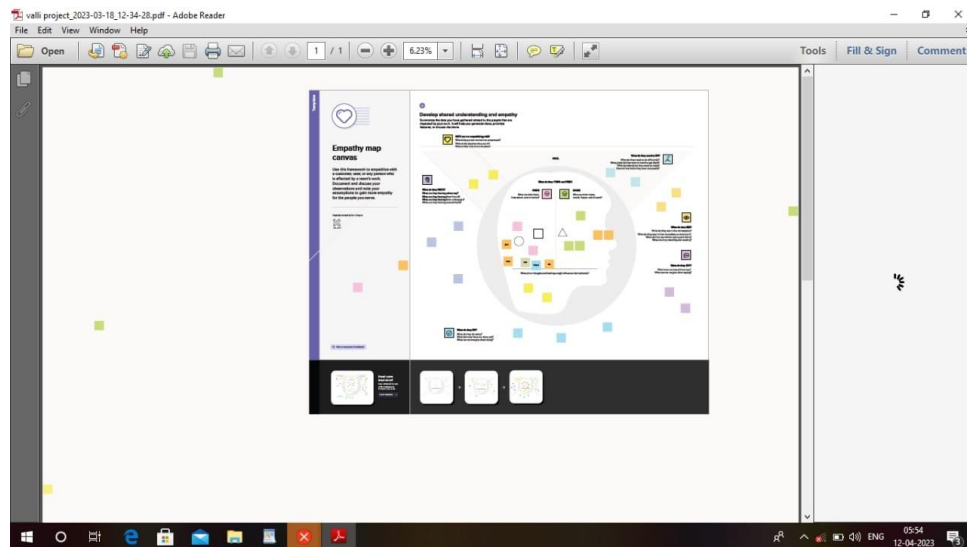
Retail management helps in saving time and ensures customer availability to locate effective management. They must keep a record of the entire buying and selling of products such as tracking cash flow and daily sales reports. It helps in maintaining the product's image and ensures the availability of goods.

1.2 PURPOSE:

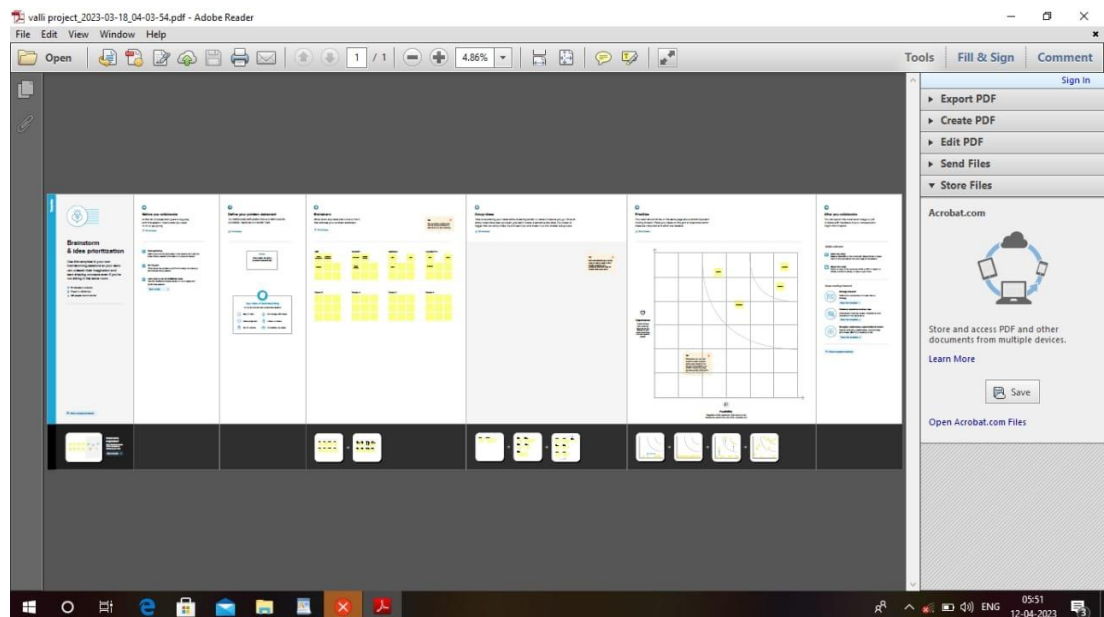
Retail Management refers to the process of helping customers find products in your store. It includes everything from increasing your customer pool to how products are presented, and how you fulfill a customer's needs. A good store manager helps customers leave the store with the smile.

2. PROBLEM DEFINITION AND DESIGN THINKING:

2.1 EMPATHY MAP:



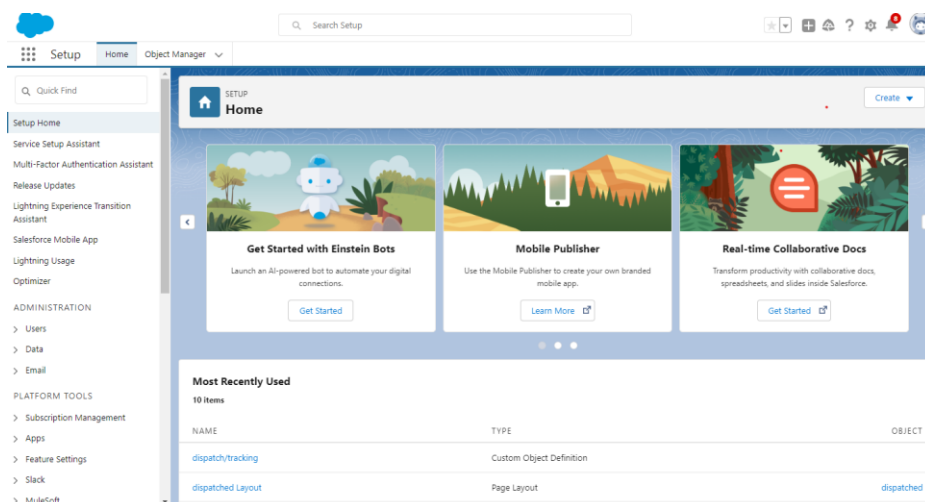
2.2 IDEATION AND BRAINSTORMING MAP:



3. RESULT:

OBJECT	DESCRIPTION
Campaign	We do promotion using this object
Leads	We capture leads here
Accounts	We capture customer data
Contacts	Employee data of customer
Opportunities	SMB sales order data
Products	Here was store product detail i.e. electronic types
Warehouse	We capture stocks data
Sales order	This is an actual order which has invoice details
Dispatch/ Tracking	Orders dispatch related info will be stored here
Cases	Historical problems of customers will be stored her
Accounts	We capture customers data

3.2 ACTIVITY AND SCREENSHOTS:



Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter People More

Q Search...

valli D

Edit User Detail

Share your awesomeness with the world.
(Or at least with your colleagues on Chatter.)

Learn new skills on Trailhead, the fun way to learn Salesforce.

Connect with fellow Trailblazers on the Trailblazer Community.

Details		Related	
Name valli D	Manager	Groups (0)	
Title	Company Name Dr.M.G.R Govt Arts & science college for women	Files (1)	
Email	Phone		

To Do List

The screenshot shows the Salesforce Setup interface for the 'expected date of delivery' object. The left sidebar contains a list of configuration options: Details (selected), Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Details' and includes a description, API Name, and various settings. The 'Enable Reports' checkbox is checked. The 'Track Activities' checkbox is also checked. The 'Track Field History' checkbox is unchecked. The 'Deployment Status' is 'Deployed'. The 'Help Settings' are set to 'Standard salesforce.com Help Window'.

Field	Value
Description	
API Name	expected_date_of_delivery__c
Custom	✓
Singular Label	expected date of delivery
Plural Label	expected date of deliveries
Enable Reports	✓
Track Activities	✓
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

master | Salesforce

drmgrgovtartsiencecolleg5-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000004Dv5B/Details/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

master

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Description

API Name
master__c

Custom
✓

Singular Label
master

Plural Label
masters

Enable Reports
✓

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Edit Delete

06:16
12-04-2023

dispatch/tracking | Salesforce

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Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

dispatch/tracking

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

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Description

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

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12-04-2023

Setup | Salesforce

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Search Setup

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

Users

Data

Email

PLATFORM TOOLS

Subscription Management

SETUP Tabs

Custom Object Tab Teachers

Below is the information for the custom tab. Click Edit to change the custom tab.

Custom Tab Definition Detail

Tab Label	Teachers	Tab Style	Laptop
Object	Teacher	Splash Page Custom Link	
Description			
Created By	yalli D. 02/04/2023, 9:01 am	Modified By	yalli D. 02/04/2023, 9:01 am

Setup | Salesforce

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Search Setup

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Release Updates

Lightning Experience Transition Assistant

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ADMINISTRATION

Users

Data

Email

PLATFORM TOOLS

Subscription Management

SETUP Tabs

Custom Object Tab warehousets

Below is the information for the custom tab. Click Edit to change the custom tab.

Custom Tab Definition Detail

Tab Label	warehousets	Tab Style	Camera
Object	warehouse	Splash Page Custom Link	
Description			
Created By	yalli D. 02/04/2023, 8:58 am	Modified By	yalli D. 02/04/2023, 8:58 am

Contact | Salesforce

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Search Setup

Setup Home Object Manager

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

Contact Custom Field

Level

Back to Contact Fields

Validation Rules (0)

Custom Field Definition Detail

Edit Set Field-Level Security View Field Accessibility Where is this used?

Field Information

Field Label	Level	Object Name	Contact
Field Name	Level	Data Type	Picklist
API Name	Level__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	yall D 21/03/2023, 6:34 pm	Modified By	yall D 21/03/2023, 6:34 pm

General Options

Required ☐

Contact | Salesforce

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Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

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Custom Field Definition Detail

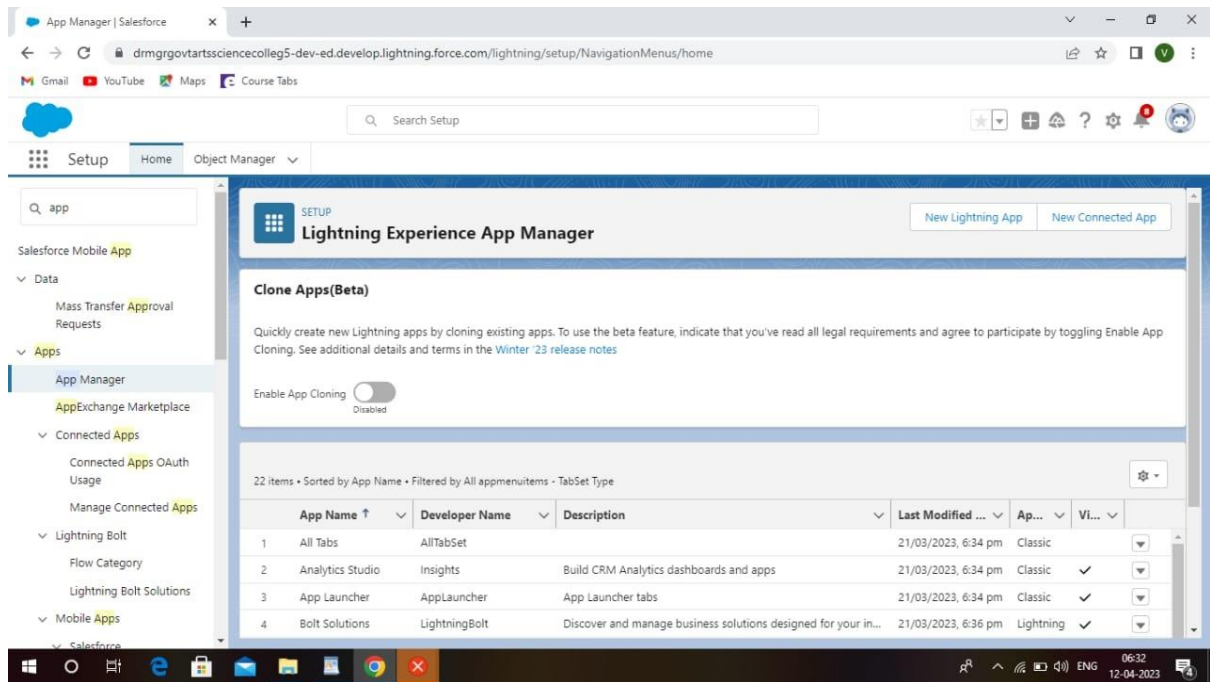
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Help Text			
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Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	yall D 21/03/2023, 6:34 pm	Modified By	yall D 21/03/2023, 6:34 pm

General Options

Required ☐



4. TRAIL HEAD PROFILE AND PUBLIC URL:

Team leader: <https://trailblazer.me/id/vvalli12>

Team member 1: <https://trailblazer.me/id/vishr62>

Team member 2: <https://trailblazer.me/id/vnavi16>

Team member 3: <https://trailblazer.me/id/vijiv2003>

5. ADVANTAGES AND DISADVANTAGES:

ADVANTAGES:

- ❖ Real-time visibility and reports are the real benefits of Retail Management Software.
- ❖ Helps to improve business process automation.
- ❖ Retail Management Software helps to manage inventory.

- ❖ Promotion and Loyalty offers.
- ❖ Streamlined point of the sale process.
- ❖ Better customer service.
- ❖ Efficient delivery mechanism.

DISADVANTAGES:

- ❖ Require more marketing costs.
- ❖ Good selling skills is required.
- ❖ High Competition.
- ❖ No benefit of bulk buying.
- ❖ Decrease production costs.

6. APPLICATION:

- ❖ RMS can help retailers streamline all the processes of running a store, from procurement of sales and back-office activities such as accounting and human resource.
- ❖ Accounting and Retail software development.
- ❖ Increasing the return on investment.
- ❖ E-commerce integration With Retail Software Development.

7. CONCLUSION:

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 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.

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.