

# **RETAIL MANAGEMENT APPLICATION USING SALESFORCE**

## **[Project report]**

### **1. INTRODUCTION :**

Retail management is a complex and challenging task that involves overseeing multiple aspects of a business, including sales, inventory, customer relations, and more. With the advent of technology, retailers are turning to software solutions to streamline their operations and enhance their performance. One such solution is Salesforce, a cloud-based customer relationship management (CRM) platform that can be customized to fit the needs of any retail business.

Salesforce's Retail Management Application is a powerful tool that can help retailers streamline their operations, improve customer engagement, and enhance their bottom line. The application offers a range of features designed to optimize key retail functions, including inventory management, supply chain management, customer relationship management, and more. In this paper, we will explore how Salesforce's Retail Management Application can help retailers overcome common challenges in the industry and achieve their business objectives.

#### **1. 1 Overview**

Salesforce Retail Management Application:

Salesforce is a cloud-based platform that provides various applications for customer relationship management (CRM), sales, marketing, and other business operations. Salesforce's Retail Management Application is designed to address the specific needs of retailers and provide them with an integrated platform to manage their operations. The Retail Management Application offered by Salesforce includes several features that can help retailers manage their business more effectively. These features include:

##### **A. Inventory Management:**

Effective inventory management is crucial for retailers, as it can impact both their bottom line and customer satisfaction. Salesforce's Retail Management Application offers several features to help retailers manage their inventory effectively. For example, retailers can track inventory levels in real-time, set automated alerts for low inventory, and optimize product pricing based on demand. Additionally, retailers can leverage data analytics to gain insights into consumer behaviour and preferences, allowing them to make data-driven decisions about inventory management.

#### B. Supply Chain Management:

The supply chain is a critical component of the retail industry, and managing it effectively can help retailers improve efficiency, reduce costs, and enhance the customer experience. Salesforce's Retail Management Application offers features to help retailers manage their supply chain effectively, such as order management, vendor management, and logistics management. The application can also integrate with other systems, such as ERP systems, to provide a comprehensive view of the entire supply chain.

#### C. Customer Relationship Management:

Customer engagement and satisfaction are key drivers of success in the retail industry. Salesforce's Retail Management Application offers features to help retailers manage their customer relationships effectively, such as customer segmentation, personalized marketing campaigns, and customer service management. The application can also integrate with other systems, such as social media platforms, to provide a comprehensive view of the customer journey.

#### D. Marketing:

Marketing is a critical component of the retail industry, and effective marketing campaigns can help retailers attract and retain customers. Salesforce's Retail Management Application offers features to help retailers manage their marketing campaigns effectively, such as email marketing, social media marketing, and analytics reporting. The application can also integrate with other systems, such as Google Analytics, to provide a comprehensive view of marketing performance. Salesforce Retail Management Application is a powerful tool that helps retailers manage their business operations efficiently. The application offers a wide range of

features that enable retailers to track their sales, inventory, customer interactions, and other critical metrics in real-time. With this application, retailers can optimize their sales processes, automate their inventory management, and provide better customer service.

The application also provides retailers with valuable insights into their business performance through detailed analytics and reporting tools. Retailers can use these insights to identify areas for improvement, monitor their progress, and make data-driven decisions that can enhance their bottom line. Salesforce Retail Management Application is highly customizable, which means retailers can tailor it to their specific needs and requirements. The application is easy to use, with a user-friendly interface that requires minimal training. Overall, Salesforce Retail Management Application is an excellent solution for retailers who want to optimize their operations, boost their sales, and provide excellent customer service. With its robust features and flexibility, this application can help retailers stay competitive in today's fast-paced retail environment.

Salesforce's Retail Management Application provides retailers with a comprehensive platform to manage their business operations. The application offers several features that can help retailers streamline their operations, improve efficiency, and provide better customer service. Retailers can also access real-time data and analytics to make informed decisions about their business. Overall, Salesforce's Retail Management Application can help retailers improve their business operations and stay ahead of the competition.

## **1.2 Purpose**

Using a retail management application built on Salesforce, there are several things that can be achieved:

- i. **Inventory Management:** With Salesforce retail management application, businesses can easily manage their inventory. The application can track inventory levels, reorder products when necessary, and provide real-time updates on inventory status. This can help businesses avoid stockouts, reduce excess inventory, and ultimately improve their bottom line.
- ii. **Sales Management:** Salesforce retail management application can help businesses manage their sales processes. It can provide sales reps with real-time data on customer preferences and buying behavior, allowing them to

make better sales decisions. The application can also track sales data, such as revenue and profit margins, enabling businesses to make informed decisions about pricing and product promotions.

- iii. **Customer Management:** Salesforce retail management application can help businesses manage their customer relationships. It can provide a 360-degree view of the customer, including their buying history, preferences, and interactions with the business. This can help businesses personalize their marketing efforts, improve customer service, and build long-term customer loyalty.
- iv. **Marketing Management:** With Salesforce retail management application, businesses can manage their marketing efforts. The application can help businesses create targeted marketing campaigns, track the success of those campaigns, and provide insights into customer behavior. This can help businesses optimize their marketing efforts, increase customer engagement, and drive revenue growth.
- v. **Analytics and Reporting:** Salesforce retail management application can provide businesses with real-time analytics and reporting. The application can generate reports on sales performance, inventory levels, and customer behaviour, allowing businesses to make data-driven decisions. This can help businesses identify trends, optimize their operations, and improve their bottom line.

Overall, a retail management application built on Salesforce can help businesses streamline their operations, improve their customer relationships, and drive revenue growth.

## **1. PROBLEMS DEFINITION & DESIGN THINKING**

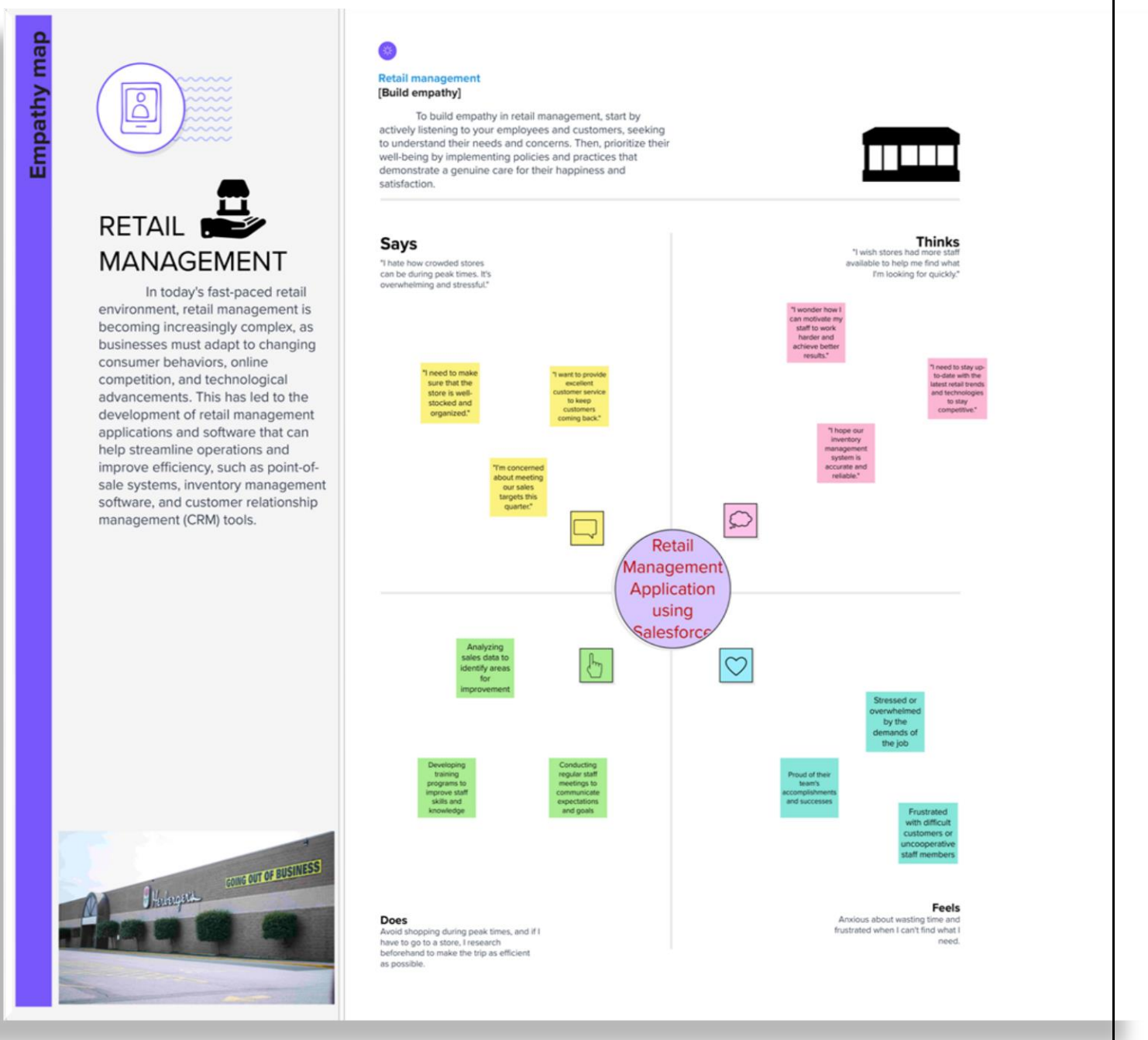
Retail management applications built on Salesforce can face various challenges that can impact their performance and effectiveness. Design thinking can be used to identify and address these challenges. Here are some problem definitions that can arise in retail management application using Salesforce:

1. **Limited Customization:** One of the challenges of using a retail management application on Salesforce is that the application may not be fully customized to meet the specific needs of a business. This can limit the functionality of the application and lead to inefficiencies in the business processes.

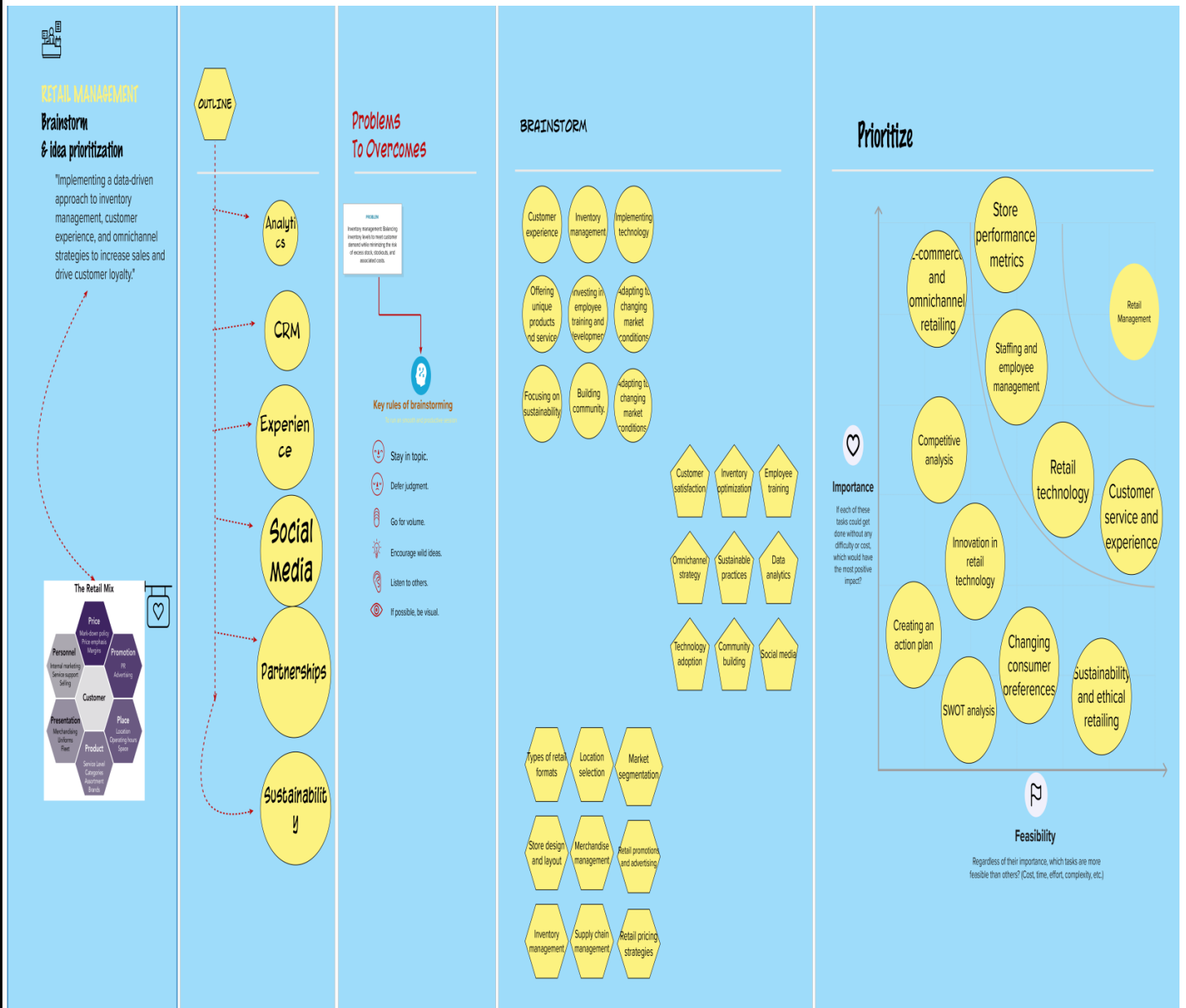
2. **Complexity:** Salesforce retail management applications can be complex, with a wide range of features and functions. This complexity can make it difficult for businesses to navigate and fully utilize the application, leading to user frustration and reduced efficiency.
3. **Data Quality:** Data quality is a significant concern for retail management applications on Salesforce. Poor data quality can result in inaccurate reporting and analytics, leading to poor decision-making by the business.

Finally, design thinking can be used to improve data quality and streamline integrations, leading to improved decision-making and faster implementation.

## 1.1 Empathy Map



## 1.2 Ideation & Brainstorming map



### 3. RESULT

#### 3.1 Data Model:

Object name	Fields in the Object	
Dispatch/Tracking	Field name	Data type
	Display/tracking	Text
Dispatched	Field name	Data type
	Dispatched	checkbox
Expected date of delivery	Field name	Data type
	Expected date of delivery	Date
Tracking Id	Field name	Data type
	Tracking id	Auto number
Sales Order	Field name	Data type
	Sales order	Master-detail

#### 3.2 Activity & Screenshot:

- Milestone-1:  
Creating of developer account
- Milestone-2:  
Fields available on Dispatch/tracking
- Milestone-3  
Relationship b/w objects

- Milestone-4

## Application

- Milestone-5

## Layouts

- Milestone-6

## User

- Milestone-7

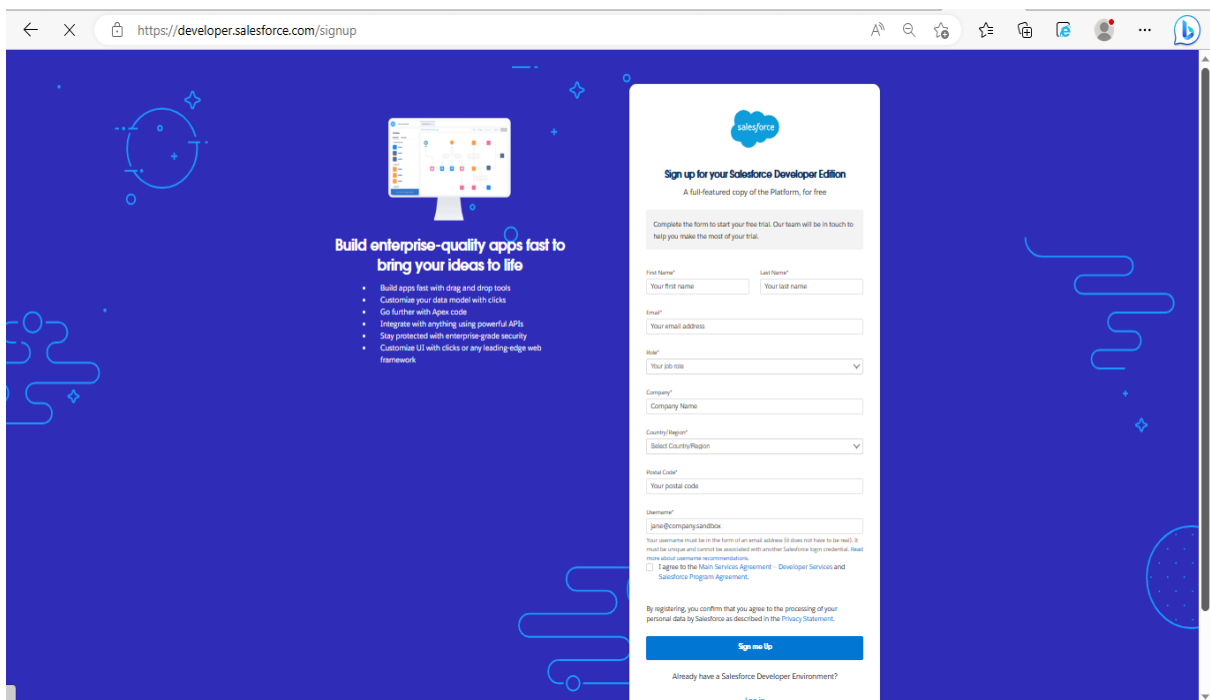
## Validation Rules

- Milestone-8

## Reports

- Milestone-9

## Dashboard



The screenshot shows the Salesforce Developer Edition sign-up page. The page has a dark blue background with white text and icons. On the left, there's a section titled "Build enterprise-quality apps fast to bring your ideas to life" with a list of bullet points: "Build apps fast with drag and drop tools", "Customize your data model with clicks", "Go further with Apex code", "Integrate with anything using powerful APIs", "Stay protected with enterprise-grade security", and "Customize UI with clicks or any leading-edge web framework". On the right, there's a white sign-up form with the Salesforce logo at the top. The form title is "Sign up for your Salesforce Developer Edition" with a subtitle "A full-featured copy of the Platform, for free". Below the title, it says "Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial." The form fields include: "First Name\*", "Last Name\*", "Email\*", "Role\*", "Company\*", "Country/Region\*", "Postal Code\*", and "Username\*". There are also checkboxes for "I agree to the Master Services Agreement" and "Developer Services and Salesforce Program Agreement". At the bottom, there's a "Sign me up" button and a link to "Log in" for users who already have a Salesforce Developer Environment.

← × https://developer.salesforce.com/signup

Build enterprise-quality apps fast to bring your ideas to life

- Build apps fast with drag and drop tools
- Customize your data model with clicks
- Go further with Apex code
- Integrate with anything using powerful APIs
- Stay protected with enterprise-grade security
- Customize UI with clicks or any leading-edge web framework

Sign up for your Salesforce Developer Edition

A full-featured copy of the Platform, for free

Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.

First Name\*  
Your first name

Last Name\*  
Your last name

Email\*  
Your email address

Role\*  
Your job role

Company\*  
Company Name

Country/Region\*  
Select Country/Region

Postal Code\*  
Your postal code

Username\*  
jane@company.sandbox

Your username must be in the form of an email address (it does not have to be real). It must be unique and cannot be associated with another Salesforce login credential. [Read more about username recommendations.](#)


☐ I agree to the Master Services Agreement [Developer Services and Salesforce Program Agreement.](#)

By registering, you confirm that you agree to the processing of your personal data by Salesforce as described in the [Privacy Statement](#).

Sign me up

Already have a Salesforce Developer Environment?  
[Log in](#)





### Sign up for your Salesforce Developer Edition

A full-featured copy of the Platform, for free

Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.

First Name\*

VASUDEVAN

Last Name\*

D

Email\*

vasudevan5614@gmail.com

Role\*

Developer

Company\*

GOVT ARTS AND SCIENCE COLLEGE

Country/Region\*

India

Postal Code\*

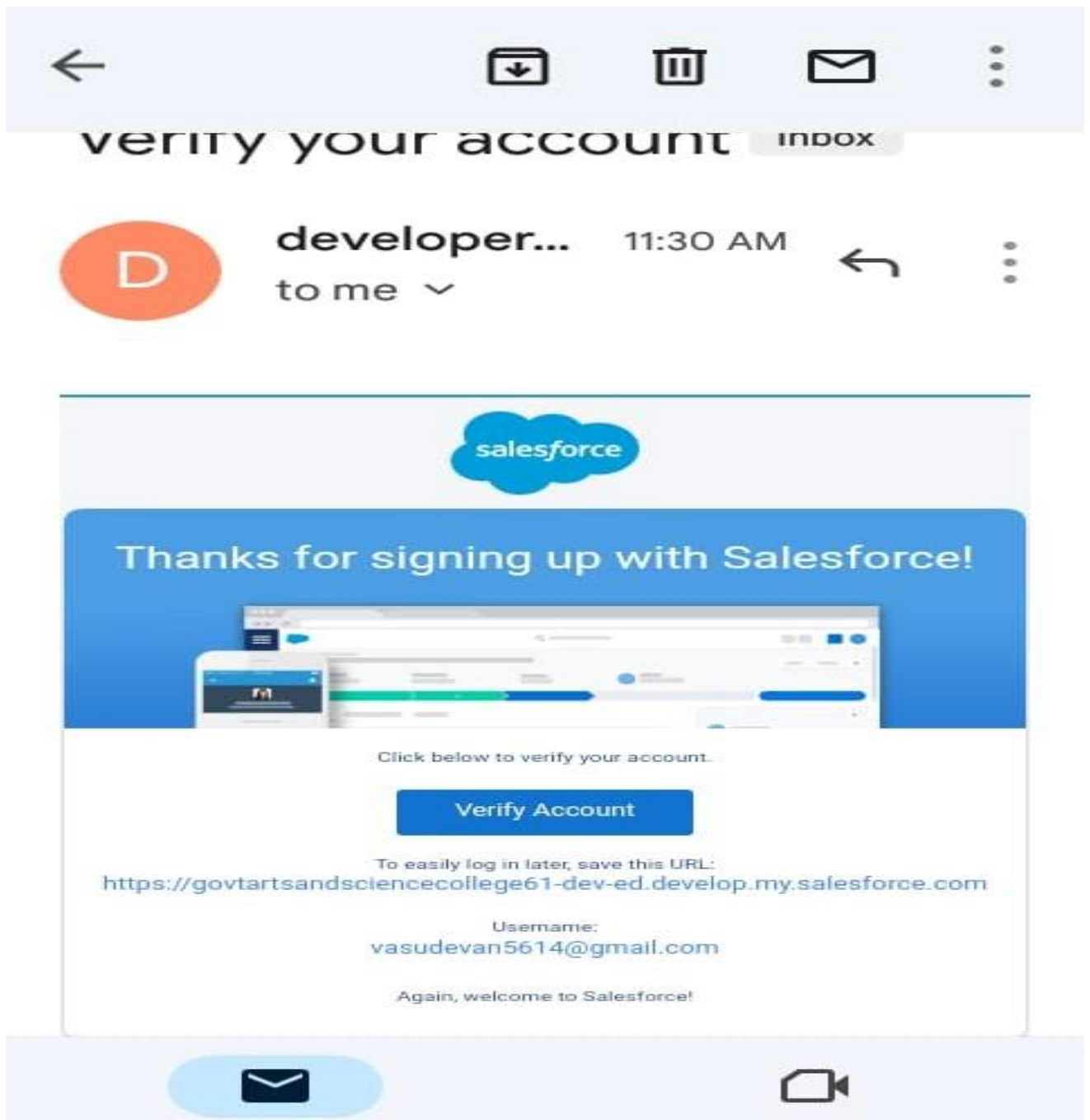
607203

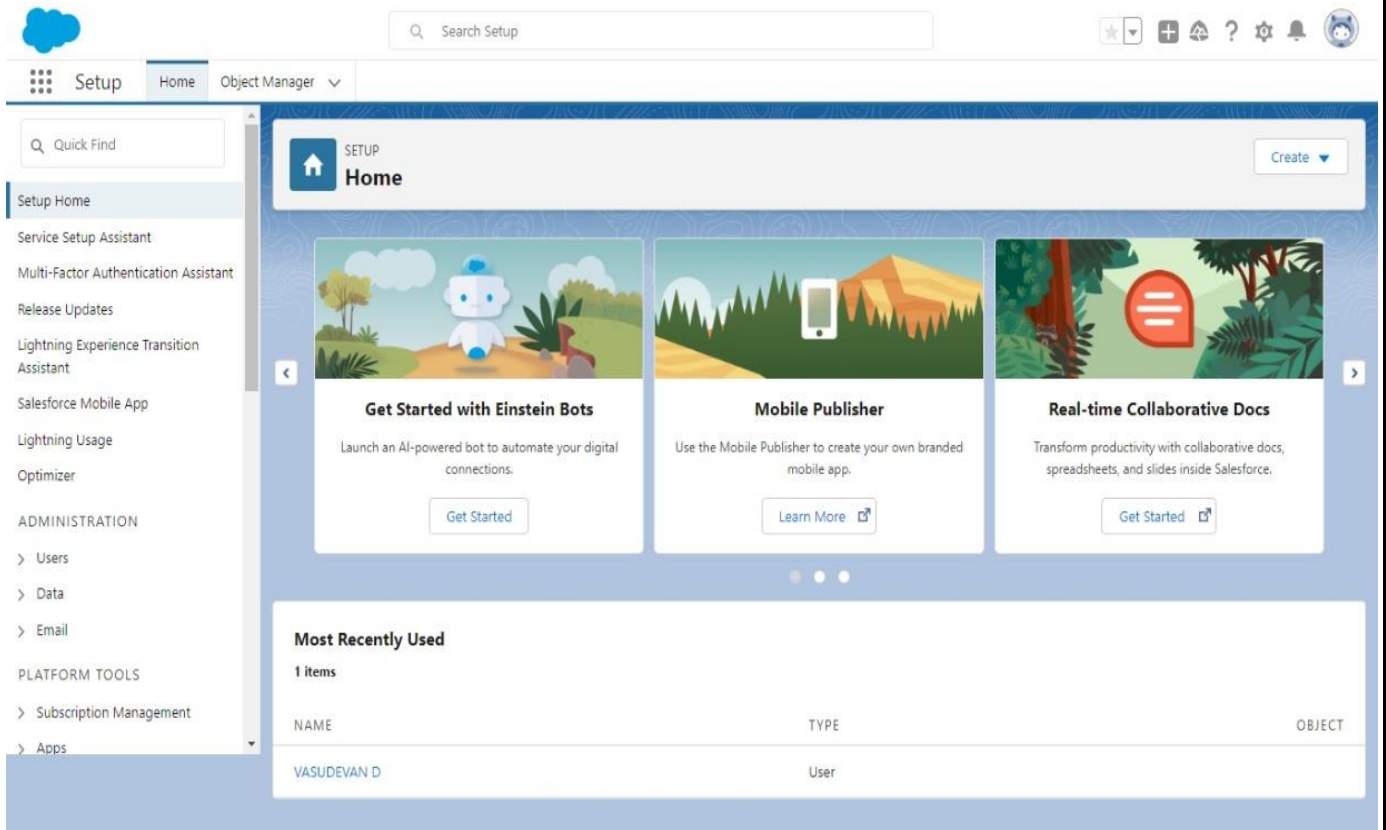
Username\*

vasudevan5614@gmail.com

Your username must be in the form of an email address (it does not have to be real). It must be unique and cannot be associated with another Salesforce login credential. Read more about username recommendations.

☒ I agree to the Main Services Agreement – Developer Services and





The image shows the Salesforce Setup Home page. At the top, there is a search bar labeled "Search Setup" and a navigation bar with "Setup", "Home", and "Object Manager". A left sidebar contains a "Quick Find" search bar and a list of navigation items: 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), and PLATFORM TOOLS (Subscription Management, Apps). The main content area features three cards: "Get Started with Einstein Bots", "Mobile Publisher", and "Real-time Collaborative Docs". Below these is a "Most Recently Used" section showing a table with one item: "VASUDEVAN D" of type "User".

Student

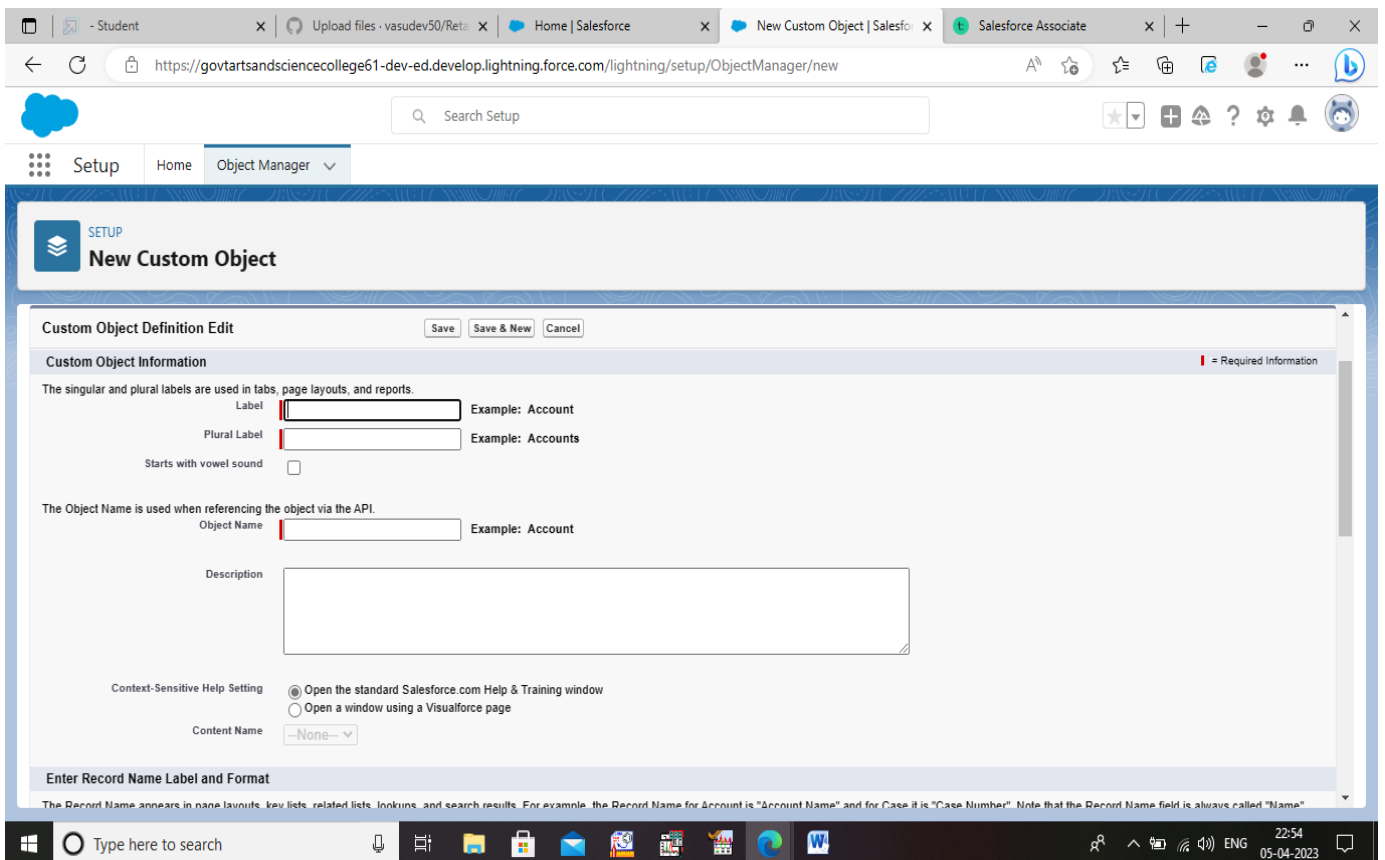
Upload files - vasudev50/Ret...

Home | Salesforce


New Custom Object | Salesfo...

Salesforce Associate








https://govtartsandsciencecollege61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new



The image shows the "New Custom Object" page in Salesforce Setup. The page title is "New Custom Object". Below the title is a "Custom Object Definition Edit" section with buttons for "Save", "Save & New", and "Cancel". The "Custom Object Information" section contains fields for "Label", "Plural Label", "Object Name", and "Description". There are also checkboxes for "Starts with vowel sound" and "Context-Sensitive Help Setting", and a "Content Name" dropdown menu. At the bottom, there is a section for "Enter Record Name Label and Format" with a note about the Record Name field.



Search Setup



SetupHomeObject Manager

Dispatch/Tracking

DetailsFields & RelationshipsPage LayoutsLightning Record PagesButtons, Links, and ActionsCompact LayoutsField SetsObject LimitsRecord TypesRelated Lookup FiltersSearch LayoutsList View Button Layout

Dispatch/Tracking

New Custom Field

Help for this Page

Step 2. Enter the details

Step 2 of 4

PreviousNextCancel

Field LabelDispatched

Default ValueCheckedUnchecked

Field NameDispatched

Description


Help Text

Auto add to custom report typeAdd this field to existing custom report types that contain this entity








PreviousNextCancel

- StudentUpload files - vasudev50/RetoHome | SalesforceTabs | SalesforceSalesforce Associate

https://govtartsandsciencecollege61-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2...



Search Setup



SetupHomeObject Manager

tab

User InterfaceLoaded Console Tab LimitRename Tabs and LabelsTabs

Didn't find what you're looking for? Try using Global Search.

SETUP

Tabs

Step 1. Enter the Details

Step 1 of 3

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or create a new custom object now.

ObjectDisplay/Tracking

Tab StyleCell phone

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.


Splash Page Custom Link--None--

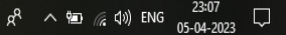
Enter a short description.

Description

NextCancel

Type here to search





23:0705-04-2023

Browser tabs: - Student, Upload files - vasudev50/Reti..., Home | Salesforce, Tabs | Salesforce, Salesforce Associate

URL: <https://govtartsandsciencecollege61-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2F...>

Search Setup

Setup Home Object Manager

tab

User Interface

- Loaded Console Tab Limit
- Rename Tabs and Labels
- Tabs**

Didn't find what you're looking for? Try using Global Search.

### SETUP Tabs

Step 1. Enter the Details Step 1 of 3

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or [create a new custom object now](#)

Object: Display/Tracking

Tab Style: Cell phone

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link: --None--

Enter a short description.

Description:

Next Cancel

Windows taskbar: Type here to search, File Explorer, Mail, Calendar, Photos, Edge, Word

Browser tabs: - Student, Upload files - vasudev50/Reti..., Home | Salesforce, Tabs | Salesforce, Salesforce Associate

URL: <https://govtartsandsciencecollege61-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2F...>

Search Setup

Setup Home Object Manager

tab

User Interface

- Loaded Console Tab Limit
- Rename Tabs and Labels
- Tabs**

Didn't find what you're looking for? Try using Global Search.

### SETUP Tabs

## New Custom Object Tab

Step 2. Add to Profiles Step 2 of 3

Choose the user profiles for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each profile.

☒ Apply one tab visibility to all profiles (Default On)

☐ Apply a different tab visibility for each profile

Profile	Tab Visibility
Analytics Cloud Integration User	Default On
Analytics Cloud Security User	Default On
Authenticated Website	Default On
Authenticated Website	Default On
Contract Manager	Default On
Cross Org Data Proxy User	Default On
Custom: Marketing Profile	Default On

Help for this Page

Setup

Home

Object Manager

Search Setup

Object Manager

51 Items, Sorted by Label

Quick Find

Schema Builder

Create

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Account	Standard Object			
Activity	Activity	Standard Object			
Alternative Payment Method	AlternativePaymentMethod	Standard Object			
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object			
Appointment Invitation	AppointmentInvitation	Standard Object			
Appointment Invitee	AppointmentInvitee	Standard Object			
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object			
Asset	Asset	Standard Object			
Asset Action	AssetAction	Standard Object			
Asset Action Source	AssetActionSource	Standard Object			
Asset Relationship	AssetRelationship	Standard Object			

Setup

Home

Object Manager

Search Setup

Object Manager

Dispatch/Tracking

Quick Find

Schema Builder

Create

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

Auto Number

Formula

Roll-Up Summary

Lookup Relationship

Master-Detail Relationship

External Lookup Relationship

Checkbox

Currency

Date

Date/Time

Email

A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Allows users to select a True (checked) or False (unchecked) value.

Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Allows users to enter a date or pick a date from a popup calendar.

Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.

Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

Setup

Home

Object Manager

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Buttons, Links, and Actions

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Object Limits

Record Types

Related Lookup Filters

Search Layouts

Fields & Relationships

5 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		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Tracking ID	Name	Text(80)		✓



Setup

Home

Object Manager

Search Setup

Star

Plus

Refresh

Help

Settings

Notifications

Profile

Quick Find

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

Apps

SETUP Home

Create

Get Started with Einstein Bots

Launch an AI-powered bot to automate your digital connections.

Get Started

Mobile Publisher

Use the Mobile Publisher to create your own branded mobile app.

Learn More

Real-time Collaborative Docs

Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.

Get Started

Most Recently Used

1 Items

NAME	TYPE	OBJECT
VASUDEVAN D	User	

Setup

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Plus

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Profile

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

Details

Edit

Delete

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

Setup

Home

Object Manager

Search Setup

Star

Plus

Refresh

Help

Settings

Notifications

Profile

SETUP > OBJECT MANAGER

Dispatch/Tracking

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

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Object Limits

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Related Lookup Filters

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List View Button Layout

Fields & Relationships

4 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)		✓
Tracking ID	Name	Text(80)		✓

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

Dispatch/Tracking

New Custom Field

Help for this Page

Step 2. Enter the details

Step 2 of 4

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

Quick Find

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

> Apps

SETUP

Home

Get Started with Einstein Bots

Launch an AI-powered bot to automate your digital connections.

Get Started

Mobile Publisher

Use the Mobile Publisher to create your own branded mobile app.

Learn More

near-time collaborative docs

Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.

Get Started

Most Recently Used

6 items

NAME	TYPE	OBJECT
Dispatched	Custom Field Definition	Dispatch/Tracking
Dispatch/Tracking	Custom Object Definition	
Dispatch/Trackings	Custom Tab Definition	Dispatch/Tracking
Display/Tracking Layout	Page Layout	Dispatch/Tracking
VASUDEVAN D	User	
supportforce	Custom App	

VASUDEVAN D

govtartsandsciencecollege61-dev-ed.develo...

Settings Log Out

DISPLAY DENSITY

☒ Comfy

Compact

OPTIONS

Switch to Salesforce Classic

Add Username



Search Setup



Setup

Home

Object Manager

Quick Find

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

> Apps

SETUP  
Home

Create



### Get Started with Einstein Bots

Launch an AI-powered bot to automate your digital connections.

Get Started



### Mobile Publisher

Use the Mobile Publisher to create your own branded mobile app.

Learn More



### Real-time Collaborative Docs

Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.

Get Started

### Most Recently Used

6 items

NAME	TYPE	OBJECT
Dispatched	Custom Field Definition	Dispatch/Tracking
Dispatch/Tracking	Custom Object Definition	
Dispatch/Trackings	Custom Tab Definition	Dispatch/Tracking
Display/Tracking Layout	Page Layout	Dispatch/Tracking
VASUDEVAN D	User	
supportforce	Custom App	



Search Setup

New Lightning App

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

App Branding

\* App Name ⓘ

Retail Management


\* Developer Name ⓘ

VasuDV

Description ⓘ

Business (buying, designing, marketing, engaging in customer service, and selling) performed by people.

Image ⓘ



Primary Color Hex Value ⓘ

#0070D2

Clear

Next

Salesforce Notifications

Salesforce Offline

Salesforce Settings

4 Bolt Solutions LightningBolt Discover and manage business solutions designed for your L...

03/04/2023, 11:27 am Lightning ✓

5 Community Community Salesforce CRM Communities

03/04/2023, 11:24 am Classic ✓

Setup Home Object Manager

Search Setup

Lightning Experience App Manager

New Lightning App New Connected App

Clone Apps(Beta)

Quickly create new Lightning apps by cloning existing apps. To use the beta feature, indicate that you've read all legal requirements and agree to participate by toggling Enable App Cloning. See additional details and terms in the Winter '23 release notes

Enable App Cloning Disabled

21 items • Sorted by App Name • Filtered by All appmenutems - TabSet Type

	App Name ↑	Developer Name	Description	Last Modified ...	Ap...	Vi...
1	All Tabs	AllTabSet		03/04/2023, 11:24 am	Classic	
2	Analytics Studio	insights	Build CRM Analytics dashboards and apps	03/04/2023, 11:24 am	Classic	✓
3	App Launcher	AppLauncher	App Launcher tabs	03/04/2023, 11:24 am	Classic	✓
4	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your L...	03/04/2023, 11:27 am	Lightning	✓
5	Community	Community	Salesforce CRM Communities	03/04/2023, 11:24 am	Classic	✓

Setup

Home

Object Manager

Mass Transfer Approval Requests

Apps

App Manager

AppExchange Marketplace

Connected Apps

Connected Apps OAuth Usage

Manage Connected Apps

Lightning Bolt

Flow Category

Lightning Bolt Solutions

Mobile Apps

Salesforce

Salesforce Branding

Salesforce Navigation

Salesforce Notifications

Salesforce Offline

Salesforce Settings

Search Setup

New Lightning App

add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items

Selected Items

Type to filter list...

Alert Settings

All Sites

Alternative Payment Methods

App Launcher

Appointment Invitations

Approval Requests

Accounts

Opportunities

Leads

Dispatch/Trackings

Campaigns

Back

Next

Salesforce Notifications

Salesforce Offline

Salesforce Settings

4 Bolt Solutions LightningBolt Discover and manage business solutions designed for your L...

03/04/2023, 11:27 am Lightning ✓

5 Community Community Salesforce CRM Communities

03/04/2023, 11:24 am Classic ✓

Search Setup

New Lightning App

User Profiles

Choose the user profiles that can access this app.

Available Profiles

Type to filter list...

Minimum Access - Salesforce

Partner App Subscription User

Partner Community Login User

Partner Community User

Read Only

Selected Profiles

System Administrator

Back

Save & Finish

Salesforce Notifications

Salesforce Offline

Salesforce Settings

4 Bolt Solutions LightningBolt Discover and manage business solutions designed for your L... 03/04/2023, 11:27 am Lightning ✓

5 Community Community Salesforce CRM Communities 03/04/2023, 11:24 am Classic ✓

Setup

Home

Object Manager

tab

User Interface

Loaded Console Tab Limit

Rename Tabs and Labels

Tabs

Didn't find what you're looking for? Try using Global Search.

SETUP

Tabs

Custom Tabs

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. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs

New What Is This?

Action	Label	Tab Style	Description
Edit   Del	Dispatch/Trackings	Telescope	
Edit   Del	Parents	Presenter	
Edit   Del	sales orders	Panel	
Edit   Del	Students	Laptop	
Edit   Del	Warehouses	Shopping Cart	

Web Tabs

New What Is This?

No Web Tabs have been defined

Setup

Home

Object Manager

Search Setup

Star

Plus

Help

Settings

Notifications

Profile

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

User Interface

Action Link Templates

Actions & Recommendations

App Menu

SETUP

Users

Help for this Page

All Users

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: iOS | Android

View: All Users

Edit | Create New User

A

B

C

D

E

F

G

H

I

J

K

L

M

N

O

P

Q

R

S

T

U

V

W

X

Y

Z

Other

All

New User

Reset Password(s)

Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatter_00d2v00000rs31eab.8gotan3vyn3@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	D. VASUDEVAN	VD	vasudevan5614@gmail.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	User Integration	integ	integration@00d2v00000rs31eab.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightsecurity@00d2v00000rs31eab.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

New User

Reset Password(s)

Add Multiple Users

A

B

C

D

E

F

G

H

I

J

K

L

M

N

O

P

Q

R

S

T

U

V

W

X

Y

Z

Other

All

Setup

Home

Object Manager

Search Setup

Star

Plus

Help

Settings

Notifications

Profile

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

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Data.com

Prospector Users

User Interface

Action Link Templates

Actions & Recommendations

App Menu

SETUP

Users

User Edit

Save

Save & New

Cancel

General Information

First Name

VASUDEVAN

Last Name

D

Alias

DVD

Email

vasudevan5614@gmail.com

Username

vasudevan5614@gmail.com

Nickname

vasuDV

Title

Retail management

Company

Govt arts and science colleg

Department

CRM

Division

Retail management

Role

<None Specified>

User License

Salesforce

Profile

Standard User

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

--None--

Data.com Monthly Addition Limit

Default Limit (300)

Setup

Home

Object 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

☐ Auto Number

☐ Formula

☐ Roll-Up Summary

☐ Lookup Relationship

☒ Master-Detail Relationship

☐ External Lookup Relationship

☐ Checkbox

☐ Currency

☐ Date

☐ Date/Time

☐ Email

A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Allows users to select a True (checked) or False (unchecked) value.

Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Allows users to enter a date or pick a date from a popup calendar.

Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.

Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

Sales

Home

Opportunities

Leads

Tasks

Files

Accounts

Contacts

Campaigns

Dashboards

Reports

Chatter

Groups

More

Reports

Recent

2 items

Search recent reports...

New Report

New Folder

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	product with stock availability		Private Reports	VASUDEVAN D	11/4/2023, 12:55 pm	
Created by Me	sample flow report screen flows		Private Reports	VASUDEVAN D	11/4/2023, 12:48 pm	
Private Reports						
Public Reports						
All Reports						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						

Report: Accounts  
**product with stock availability**

Enable Field Editing

	Last Activity	Account Owner	Account Name	Billing State/Province	Type	Rating	Last Modified Date
1	-	VASUDEVAN D	GenePoint	CA	Customer - Channel	Cold	03/04/2023
2	-	VASUDEVAN D	United Oil & Gas, UK	UK	Customer - Direct	-	03/04/2023
3	-	VASUDEVAN D	United Oil & Gas, Singapore	Singapore	Customer - Direct	-	03/04/2023
4	-	VASUDEVAN D	Edge Communications	TX	Customer - Direct	Hot	03/04/2023
5	-	VASUDEVAN D	Burlington Textiles Corp of America	NC	Customer - Direct	Warm	03/04/2023
6	-	VASUDEVAN D	Pyramid Construction Inc.	-	Customer - Channel	-	03/04/2023
7	-	VASUDEVAN D	Dickenson plc	KS	Customer - Channel	-	03/04/2023
8	-	VASUDEVAN D	Grand Hotels & Resorts Ltd	IL	Customer - Direct	Warm	03/04/2023
9	-	VASUDEVAN D	Express Logistics and Transport	OR	Customer - Channel	Cold	03/04/2023
10	-	VASUDEVAN D	University of Arizona	AZ	Customer - Direct	Warm	03/04/2023
11	-	VASUDEVAN D	United Oil & Gas Corp.	NY	Customer - Direct	Hot	03/04/2023
12	-	VASUDEVAN D	sForce	CA	-	-	03/04/2023
13	-	Automated Process	Sample Account for Entitlements	-	-	-	03/04/2023

To Do List

Type here to search

Dashboards | Salesforce

Search recent dashboards...

New Dashboard New Folder

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Products with stock availability		Private Dashboards	VASUDEVAN D	11/4/2023, 12:58 pm	

Created by Me

Private Dashboards

All Dashboards

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

Student | vasudev50 | Home • MURAL | Salesforce retail man... | Retail\_Management\_m... | Dashboards | Salesforce | + -

https://govtartsandsciencecollege61-dev-ed.develop.lightning.force.com/lightning/o/Dashboard/home?queryScope=mru

Search...

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

**Dashboards**

Recent

1 item

Search recent dashboards... New Dashboard New Folder

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Products with stock availability		Private Dashboards	VASUDEVAN D	11/4/2023, 12:58 pm	

Created by Me

Private Dashboards

All Dashboards

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

Type here to search

Student | vasudev50 | Home • MURAL | Salesforce retail man... | Retail\_Management\_m... | product with stock av... | + -

https://govtartsandsciencecollege61-dev-ed.develop.lightning.force.com/lightning/r/Report/00O2w00000EstdnEAD/view

Search...

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

**Report: Accounts**

**product with stock availability**

Enable Field Editing

Add Chart

Edit

Total Records: 13

	Last Activity	Account Owner	Account Name	Billing State/Province	Type	Rating	Last Modified Date
1	-	VASUDEVAN D	GenePoint	CA	Customer - Channel	Cold	03/04/2023
2	-	VASUDEVAN D	United Oil & Gas, UK	UK	Customer - Direct	-	03/04/2023
3	-	VASUDEVAN D	United Oil & Gas, Singapore	Singapore	Customer - Direct	-	03/04/2023
4	-	VASUDEVAN D	Edge Communications	TX	Customer - Direct	Hot	03/04/2023
5	-	VASUDEVAN D	Burlington Textiles Corp of America	NC	Customer - Direct	Warm	03/04/2023
6	-	VASUDEVAN D	Pyramid Construction Inc.	-	Customer - Channel	-	03/04/2023
7	-	VASUDEVAN D	Dickenson plc	KS	Customer - Channel	-	03/04/2023
8	-	VASUDEVAN D	Grand Hotels & Resorts Ltd	IL	Customer - Direct	Warm	03/04/2023
9	-	VASUDEVAN D	Express Logistics and Transport	OR	Customer - Channel	Cold	03/04/2023
10	-	VASUDEVAN D	University of Arizona	AZ	Customer - Direct	Warm	03/04/2023
11	-	VASUDEVAN D	United Oil & Gas Corp.	NY	Customer - Direct	Hot	03/04/2023

To Do List

Type here to search

06:00 16-04-2023

Dashboard: **Products with stock availability**  
As of 16-Apr-2023, 5:59 am Viewing as VASUDEVAN D

product with stock availability

Last Activity	Account Owner	Account Name	Billing State/Province	Type
- VASUDEVAN D	GenePoint	CA	Customer - Channel	
- VASUDEVAN D	United Oil & Gas, UK	UK	Customer - Direct	
- VASUDEVAN D	United Oil & Gas, Singapore	Singapore	Customer - Direct	
- VASUDEVAN D	Edge Communications	TX	Customer - Direct	
- VASUDEVAN D	Burlington Textiles Corp	NC	Customer - Direct	

[View Report \(product with stock availability\)](#)

Report: Accounts **Product with stock availability**

Enable Field Editing

	Last Activity	Account Owner	Account Name	Billing State/Province	Type	Rating	Last Modified Date
1	-	VASUDEVAN D	GenePoint	CA	Customer - Channel	Cold	03/04/2023
2	-	VASUDEVAN D	United Oil & Gas, UK	UK	Customer - Direct	-	03/04/2023
3	-	VASUDEVAN D	United Oil & Gas, Singapore	Singapore	Customer - Direct	-	03/04/2023
4	-	VASUDEVAN D	Edge Communications	TX	Customer - Direct	Hot	03/04/2023
5	-	VASUDEVAN D	Burlington Textiles Corp of America	NC	Customer - Direct	Warm	03/04/2023
6	-	VASUDEVAN D	Pyramid Construction Inc.	-	Customer - Channel	-	03/04/2023
7	-	VASUDEVAN D	Dickenson plc	KS	Customer - Channel	-	03/04/2023
8	-	VASUDEVAN D	Grand Hotels & Resorts Ltd	IL	Customer - Direct	Warm	03/04/2023
9	-	VASUDEVAN D	Express Logistics and Transport	OR	Customer - Channel	Cold	03/04/2023
10	-	VASUDEVAN D	University of Arizona	AZ	Customer - Direct	Warm	03/04/2023
11	-	VASUDEVAN D	United Oil & Gas Corp.	NY	Customer - Direct	Hot	03/04/2023
12	-	VASUDEVAN D	sForce	CA	-	-	03/04/2023
13	-	Automated Process	Sample Account for Entitlements	-	-	-	03/04/2023

#### 4. Trailhead Profile Public URL:

Team Lead: <https://trailblazer.me/id/vasudv>

Team Member1- <https://trailblazer.me/id/simbu3>

Team Member2- <https://trailblazer.me/id/mgaran3>

Team Member3- <https://trailblazer.me/id/ssankaran32>

## **5. ADVANTAGES & DISADVANTAGES:**

### **Advantages of Retail Management:**

1. Improved customer experience: Retail management ensures that customers have a smooth shopping experience, resulting in customer satisfaction and loyalty.
2. Increased sales: Effective retail management can lead to increased sales, as it enables retailers to make informed decisions about product selection, pricing, and promotions.
3. Better inventory management: Retail management helps to optimize inventory levels and reduce stockouts, ensuring that retailers always have the right products available.
4. Increased efficiency: Retail management tools can automate many manual tasks, increasing efficiency and reducing labor costs.
5. Greater profitability: By improving sales, reducing costs, and optimizing inventory, effective retail management can lead to greater profitability.

### **Disadvantages of Retail Management:**

1. High competition: The retail industry is highly competitive, making it challenging to maintain a competitive edge and succeed in the market.
2. Rapidly changing market: The retail market is constantly evolving, making it challenging for retailers to keep up with changing trends and consumer preferences.
3. High operating costs: Retail businesses require a significant investment in inventory, real estate, and staffing, resulting in high operating costs.
4. Seasonal fluctuations: Many retail businesses experience seasonal fluctuations in demand, which can make it difficult to forecast sales and manage inventory levels.
5. Dependence on suppliers: Retail businesses rely heavily on suppliers for their inventory, making them vulnerable to supply chain disruptions and price fluctuations.



## **6.APPLICATIONS:**

Retail management involves the process of managing and optimizing the operations of a retail business. It encompasses a range of activities such as merchandising, inventory management, sales, marketing, and customer service. Here are some specific applications of retail management:

1. **Merchandising:** Retail management involves selecting and managing the products that a retailer offers for sale. This includes decisions on product selection, pricing, placement, and promotion to maximize sales and profits.
2. **Inventory management:** Retail management involves managing inventory levels to ensure that the retailer always has enough stock on hand to meet customer demand, without overstocking and tying up cash in inventory.
3. **Sales management:** Retail management involves developing and implementing strategies to increase sales, such as customer loyalty programs, cross-selling, and up-selling.
4. **Marketing:** Retail management involves creating and implementing marketing campaigns to attract new customers and retain existing ones. This can include advertising, social media, and other marketing channels.
5. **Store operations:** Retail management involves managing the day-to-day operations of a retail store, including staffing, scheduling, training, and performance management.
6. **Customer service:** Retail management involves providing excellent customer service to ensure customer satisfaction, loyalty, and repeat business.

Overall, retail management plays a critical role in the success of a retail business, helping retailers to optimize operations, increase sales and profitability, and deliver a great customer experience.

## 7.CONCLUSION:

In conclusion, retail management plays a vital role in the success of a retail business. It involves managing all aspects of the business, from merchandising to marketing, inventory management, sales, and customer service. By optimizing these operations, retail management helps retailers to increase sales, improve customer satisfaction, and boost profitability.

Effective retail management requires a deep understanding of the market and consumer behavior, as well as the ability to adapt to changing trends and market conditions. It also requires a strong focus on customer service and the ability to provide a seamless shopping experience.

In summary, retail management is a multifaceted discipline that requires a diverse set of skills and expertise. By focusing on the needs of the customer and optimizing operations, retailers can succeed in today's **highly competitive retail market**.

## 8.FUTURE SCOPE:

In Salesforce,

Salesforce, a leading cloud-based customer relationship management (CRM) platform, offers a range of solutions that can be leveraged in the field of retail management. The future scope of retail management application in Salesforce includes:

1. **Personalization:** With the help of Salesforce, retailers can personalize the shopping experience for customers by leveraging data to provide tailored recommendations, promotions, and product suggestions.
2. **Inventory management:** Salesforce can be used to manage inventory across multiple channels, enabling retailers to keep track of stock levels and optimize the supply chain.
3. **Customer service:** Retailers can use Salesforce to provide a seamless customer service experience, with features such as chatbots, AI-powered customer service, and omnichannel support.

4. Marketing automation: Salesforce can be used to automate marketing campaigns, including email marketing, social media advertising, and personalized promotions.
5. Analytics: With Salesforce's advanced analytics capabilities, retailers can gain insights into customer behavior, sales trends, and inventory performance, allowing them to make data-driven decisions and optimize their operations.

Overall, the future scope of retail management application in Salesforce is significant, with the platform offering a range of solutions that can help retailers to improve their operations, increase sales, and provide a better shopping experience for customers. By leveraging Salesforce's capabilities, retailers can stay ahead of the competition and succeed in the dynamic world of retail.

In Retail industry;

The future scope of retail management is vast, with the increasing use of technology and changing consumer behavior transforming the industry. Here are some potential areas of growth and development in retail management:

1. Omni channel retailing: The future of retail management is likely to involve a more seamless integration of physical and digital channels. Retailers will need to provide a consistent experience across all channels, from in-store to online to mobile.
2. Artificial intelligence (AI): AI is expected to play an increasingly important role in retail management, with applications such as predictive analytics, personalization, and automation of routine tasks.
3. Mobile commerce: With the growing use of smartphones and tablets, mobile commerce is expected to continue to grow. Retailers will need to provide a mobile-optimized experience to meet the needs of customers on the go.
4. Sustainability: The future of retail management will also be shaped by a growing focus on sustainability, with retailers taking steps to reduce their

environmental impact and meet the demands of socially conscious consumers.

5. Virtual and augmented reality: The use of virtual and augmented reality in retail management is expected to grow, with applications such as virtual try-on and augmented reality product demonstrations.

Overall, the future of retail management is likely to be shaped by a combination of technology, changing consumer behavior, and a focus on sustainability. Retailers that are able to adapt to these trends and provide a seamless, personalized, and sustainable shopping experience are likely to succeed in the years to come.