

RETAIL MANAGEMENT APPLICATION USING SALES FORCE



1. INTRODUCTION

1.1 Overview

1. The retail management application using salesforce is the project title of that we are done. We given a detailed report that we are done by a team.

1.2 Purpose

* Retailing encompasses the business activities involved in selling goods and services to consumers for their personal, family, or household etc.

* one is a sales app for sales reps to use this application and store customers data, and the second application is a service app for service reps/agents to provide support to customers in dealing cases. To generate business on top of the customers

* Salesforce can be used to manage orders from retail
including tracking orders, processing payments

2. Problem Definition & Design Thinking



2.1: Empathy Map



Empathy map

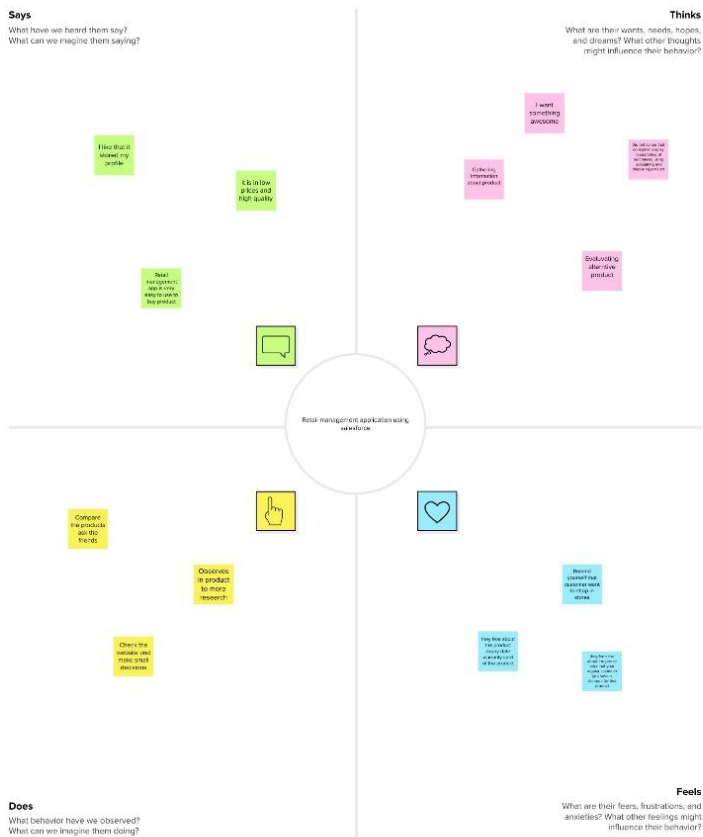
Use this framework to develop a deep, shared understanding and empathy for other people. An empathy map helps describe the aspects of a user's experience, needs and pain points, to quickly understand your users' experience and mindset.

[Share template feedback](#)

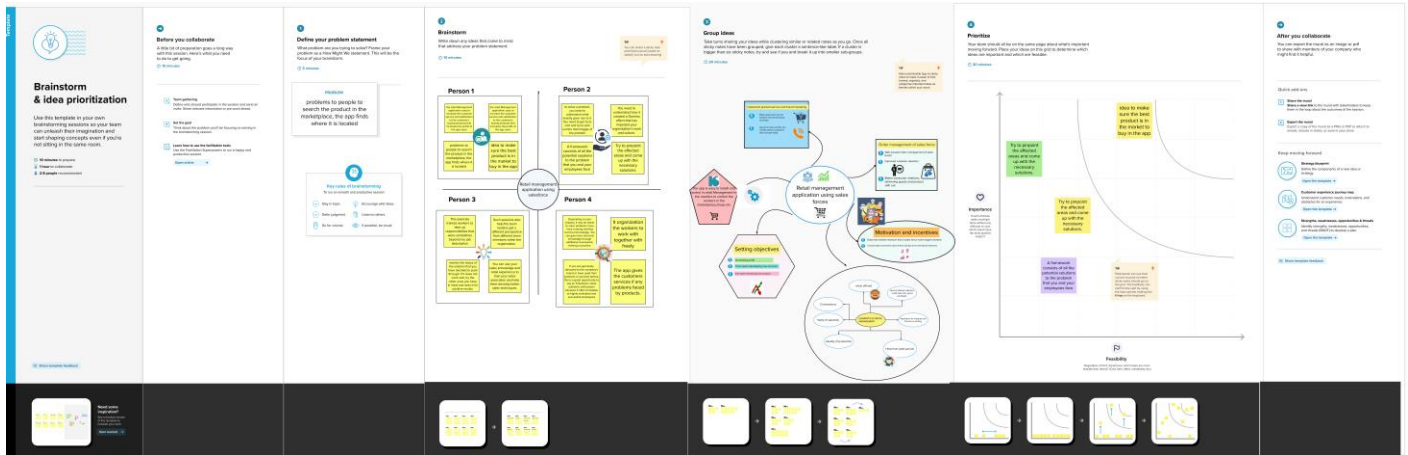


Build empathy

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



2.2: Ideation & Brainstorming Map



3. RESULT

Data Model:

Object name	Fields in the Object	
Dispatch/tracking object	Field label	Data type
	Dispatched	Checkbox
	Expected Date of Delivery	Data
	Sales order	Master-detail(sales order)
	Tracking ID	Auto number
Contact object	Field label	Data type
	Account website	Formula(text)
	Owner	Lookup (user,Group)

3.2 Activity & Screenshot

ACTIVITY:1 Dispatch/tracking

Dispatch/ tracking is created for users to track the packages they order the product

The screenshot shows the Salesforce Setup interface. The browser address bar displays the URL: `governmentthirumagalmills62-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w0000036k18/FieldsAndRelationships/view`. The page title is "Display/tracking". The left sidebar contains a navigation menu with the following items: Details, Fields & Relationships (selected), 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 "Fields & Relationships" and shows a table of fields for the "Display/tracking" object. The table has five columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The table contains five rows of data:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Dispatch/Tracking	Name	Text(80)		✓
Dispatched	Dispatched__c	Checkbox		
Last Modified By	LastModifiedById	Lookup(User)		
Order	Order__c	Master-Detail(Order)		✓

The bottom of the screenshot shows the Windows taskbar with various application icons and the system clock displaying 12:17 on 12-04-2023.

Setup

Home

Object Manager

governmentthirumagalmills62-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w00000361N9/FieldsAndRelationships/view

Search Setup

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

Fields & Relationships

7 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		
dispatched	Name	Text(80)		✓
Expected Date of Delivery	Expected_Date_of_Delivery__c	Date		
Last Modified By	LastModifiedById	Lookup(User)		
Record Type	RecordTypeId	Record Type		✓
sales order	sales_order__c	Master-Detail(sales order)		✓

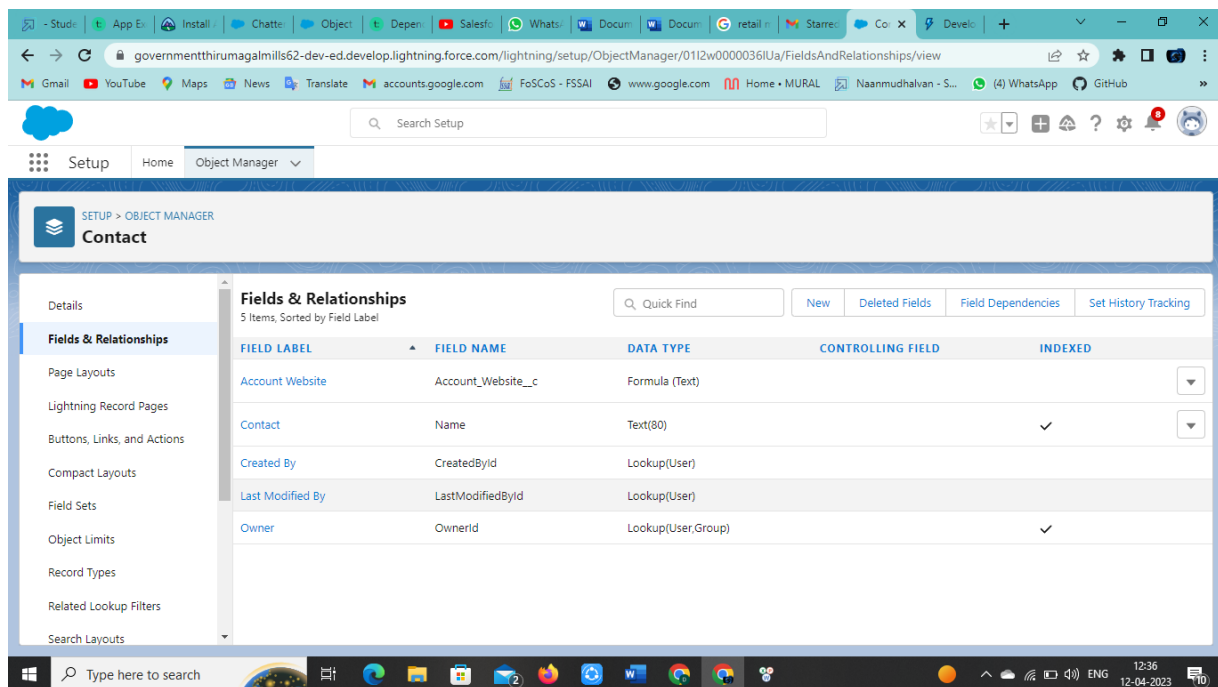
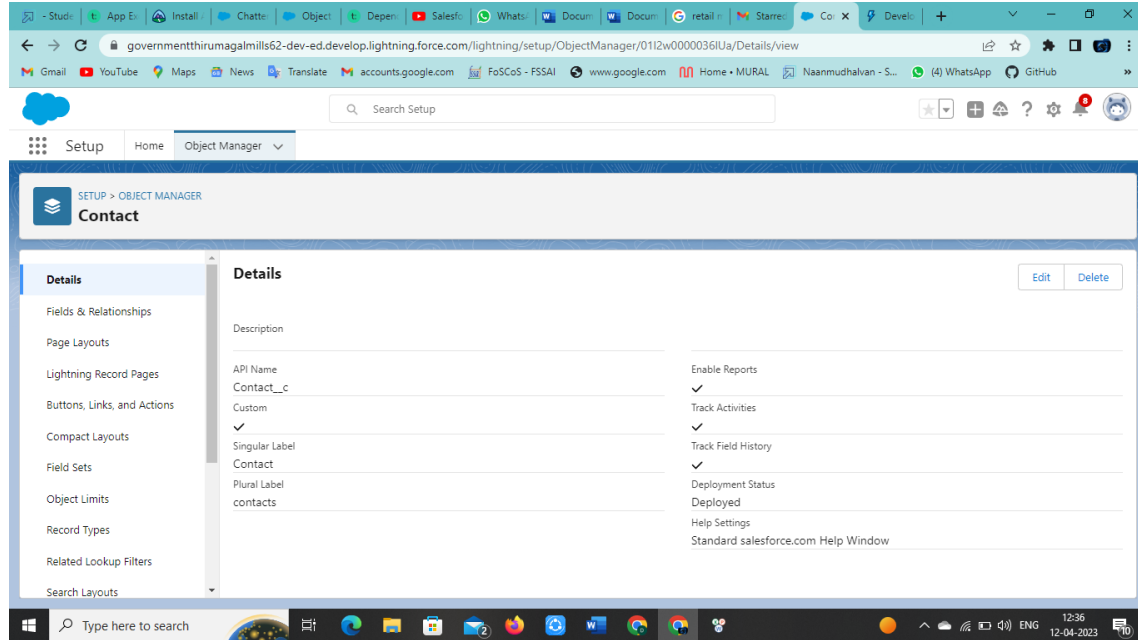
Type here to search

12:18 12-04-2023

ACTIVITY:2

CONTACT

Contact object is created for the customers contact to connected with them by accounts name and other details of the customers to contact



ACTIVITY:3

REPORT

The screenshot displays a web application interface for managing reports. The top navigation bar includes links for Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports (active), Chatter, Groups, and More. The main content area is titled 'Private Reports' and shows a list of 2 items. The table below lists the reports:

Report Name	D	Folder	Created By	Created On	Subscribed
New Accounts Report		Private Reports	Vijayarangam R	3/4/2023, 11:53 am	
Opportunities by stage		Private Reports	Vijayarangam R	27/3/2023, 11:04 am	

The interface also includes a sidebar with options like Recent, Created by Me, Private Reports (selected), Public Reports, All Reports, FOLDERS, All Folders, Created by Me, Shared with Me, and FAVORITES. A search bar is present at the top of the reports section.

Trailhead Profile Public URL

Team Leader : <https://trailblazer.me/id/vijar123>

Team Member 1 : <https://trailblazer.me/id/ykumar331>

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

Team Member 3 : <https://trailblazer.me/id/ashok4488>

5.1 ADVANTAGES

- * Retail management saves time and ensures the customers easily locate their desired merchandise and return home satisfied.

- * The retailer must keep a record of all the products coming into the store.

*** The products must be well arranged on the assigned shelves according to size, colour, gender, patterns etc.**

5.2 **DISADVANTAGE**

***Lower Profit Margin**

A large retailer can essentially tell a manufacturer, "We'll buy your product at this price only." The price the retailer sets often results in a lower-than-average profit margin for the manufacturer, which enables the retailer to sell the product for less than smaller retailers.

*** it's risky** - Because you are buying products in a bulk and you usually can't be sure that you will sell all the products

*** Unpredictable** -There are many factors in retailing so it's hard to predict all of them

*** Dealing With Customers** - You are dealing with a lots of customers, so you should put a lot of effort in to the service quality, to be sure that clients are happy

6. APPLICATIONS



- * Salesforce is the world's #1 customer relationship management (CRM) platform.

- * We help your marketing, sales, commerce, service and IT teams work as one from anywhere, so you can keep your customers happy everywhere.

- * Salesforce can be used to manage orders from retail stores and distributors, including tracking orders, processing payments, and managing inventory levels.

- * This can help field sales teams ensure that orders are fulfilled quickly and accurately and that inventory levels are maintained at optimal levels.

7. CONCLUSION

* Salesforce for Retail is a set of solutions built on the Salesforce platform designed to help retail companies manage their operations and customer relationships. These solutions include tools for managing inventory, sales, customer data, marketing, and more.

8. FUTURE SCOPE

- * Better job oppertunities
- * Better Carrer
- * Autosales process
- * Big Companies Hiring
- * Salesforce Everywhere
- * Improvement customer relationship