

# GOVERNMENT ARTS COLLEGE FOR WOMEN

## SALEM-8

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## RETAIL MANAGEMENT APPLICATIONS

## USING SALESFORCE

## 1.INTRODUCTION:

Sales force management is the **soul of the company**. Establishing a world recognize brand does not only require marketing and advertise efforts, but it also requires the sales representatives or in simple words sale force along with all other promotional activities.

- **Sales force** – Division a business **responsible** for **selling products** or services.
- Sales force is **linking** between companies and customer. Therefore, companies have to be careful in designing and structuring sales force.

## 1.1 OVERVIEW:

- Retail management refers to **the process of helping customer 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.
- Salesforce for Retail is **a set of solution 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.

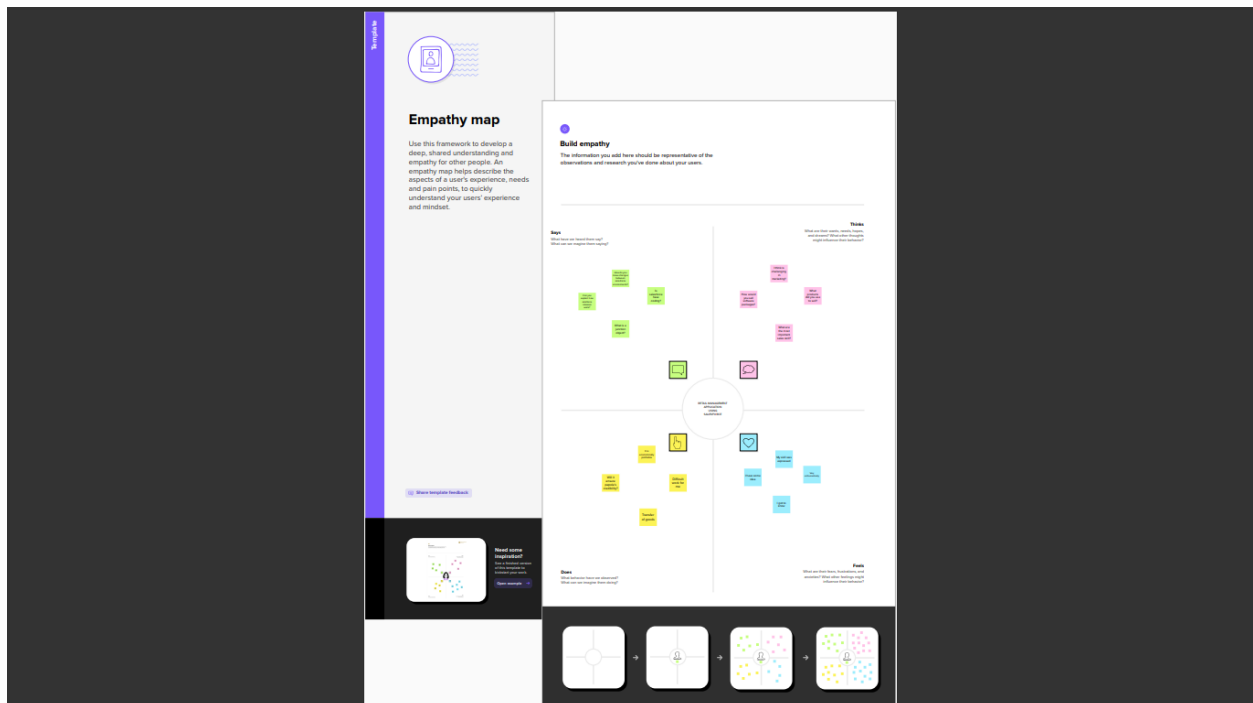
## 1.2 Purpose:

- A retail management system (RMS) is a platform that combines several modules **to aid in the day-to-day operation of a retail store or chain**, such as managing and buying inventory, checking out customers, scheduling employee shifts, keeping track of finance, etc.
- Retail management **optimizes internal processes such as inventory management, offline and online storefronts, warehouse operations, payment and accounting, and human resources**. Retail management improves overall company cohesion. Retail store management improves customer experience and boosts customer satisfaction.

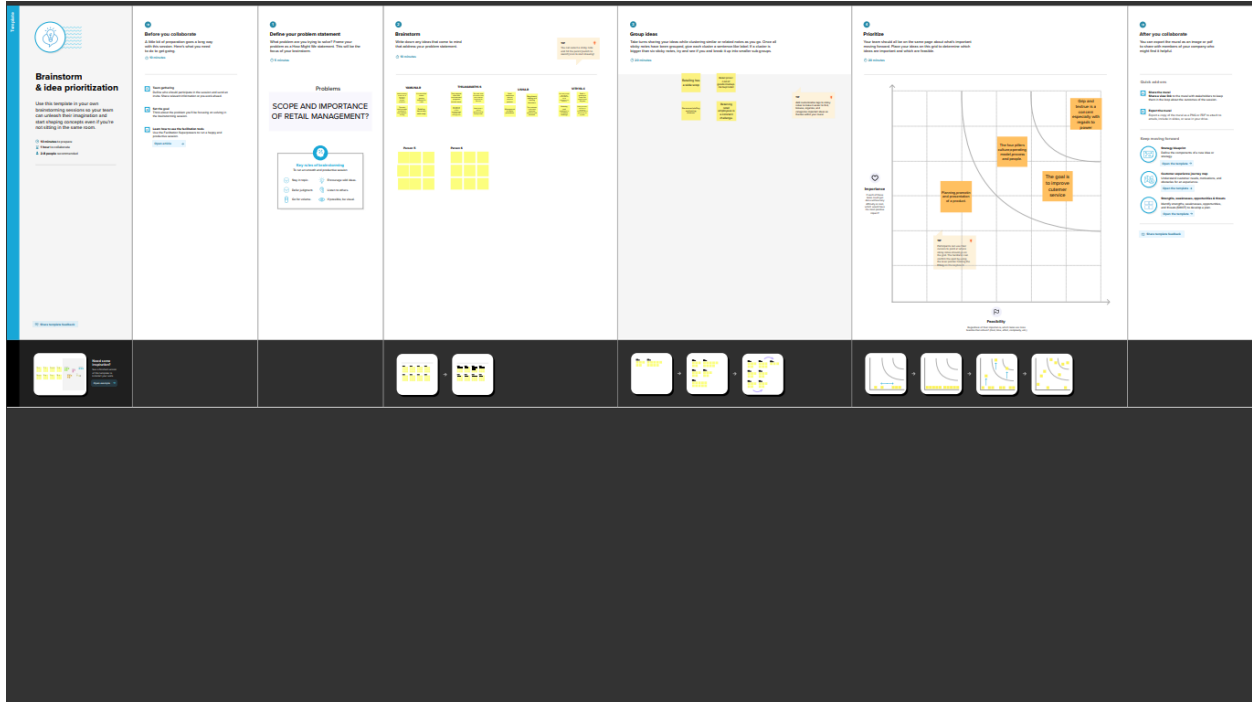
- Salesforce can be used to manage orders from retail stores and distributors, including tracking orders, processing payments, and managing inventory levels. this can help field sales teams ensure that orders are fulfilled quickly and accurately and that inventory levels are maintained at optimal levels.

## 2. Problem Definition & Design Thinking:

### 2.1 Empathy Map :



## 1.3 Ideation & Brainstorming Map:



## 3.RESULT:

### 3.1 Data Model:

Object name	Fields in the Object	
Campaign	Field Label	Data Type
	Campaign Name	Text (80)

Leads	Field Label	Data Type
	Lead Source	Picklist
Accounts	Field Label	Data Type
	Account Name	Name
Contacts	Field Label	Data Type
	Contact Name	Phone
Opportunities	Field Label	Data Type
	Opportunities Name	Text (20)
Products	Field Label	Data Type
	Product name	Text (80)
Warehouse	Field Label	Data Type

	Product Name	Text (30)
	Stock Available	Text (30)
	Record Type	Record Type

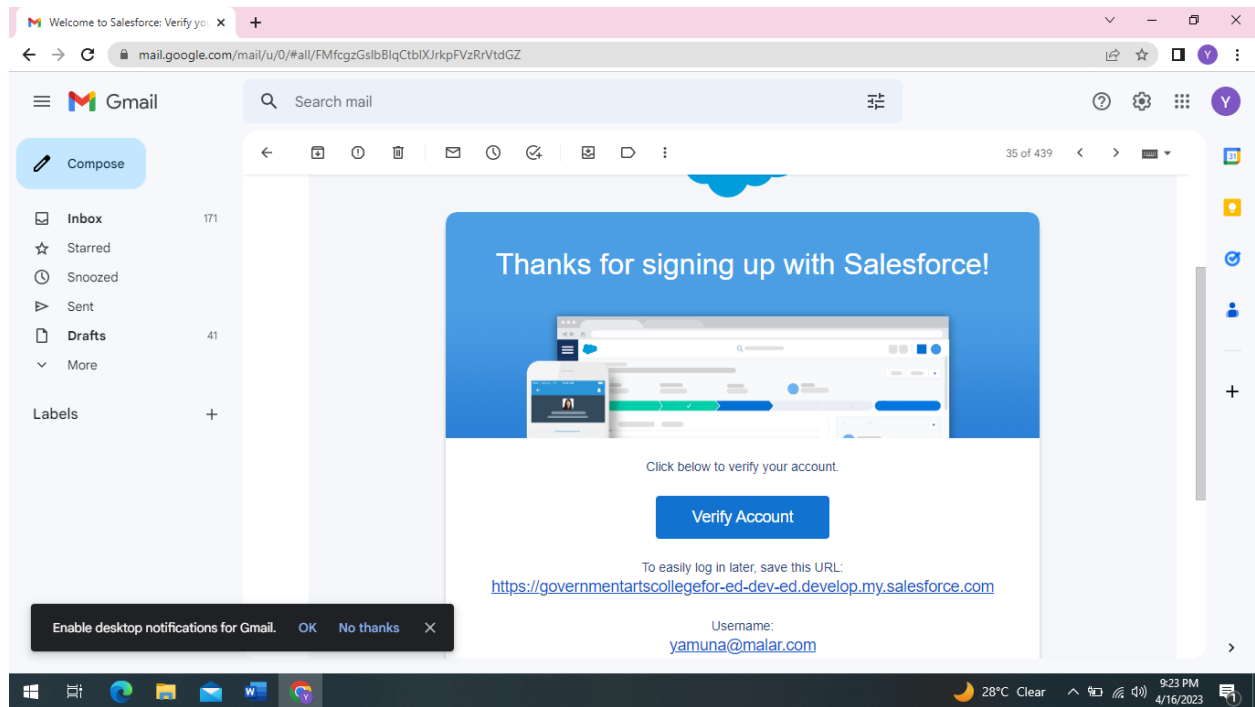
Sales Order	Field Label	Data Type
	Sales	Master-
	Order	Detail (Sales Order)
Tracking	Field Label	Data Type
	Dispatched	Checkbox



# Mileston-1

## Activity-1


### Creating Developer Account



### Login to Salesforce Account

Welcome to Salesforce: Verify yo x Login | Salesforce x +

governmentartscollegefor-ed-dev-ed.develop.my.salesforce.com/index.jsp?ec=20037&eco=1



Please check your username and password. If you still can't log in, contact your Salesforce administrator.

Username1 Saved Username

yamuna@malar.com

Password

.....

Log in

☐ Remember me

[Forgot Your Password?](#)

## Sell, market, and service with the world's #1 CRM.

Welcome to the Salesforce Customer Success Platform. Our new Lightning Platform gives you the fastest, most complete way to put your customers at the centre of everything you do.

WATCH DEMOS

FREE TRIAL

Marketing

Is this warm enough to ski in?

Yes, it's good down to -10 F

Service

Sales

Jay SharmaLoyalty Member

A special gift from NTD

20% OFFskiswale for loyal customers

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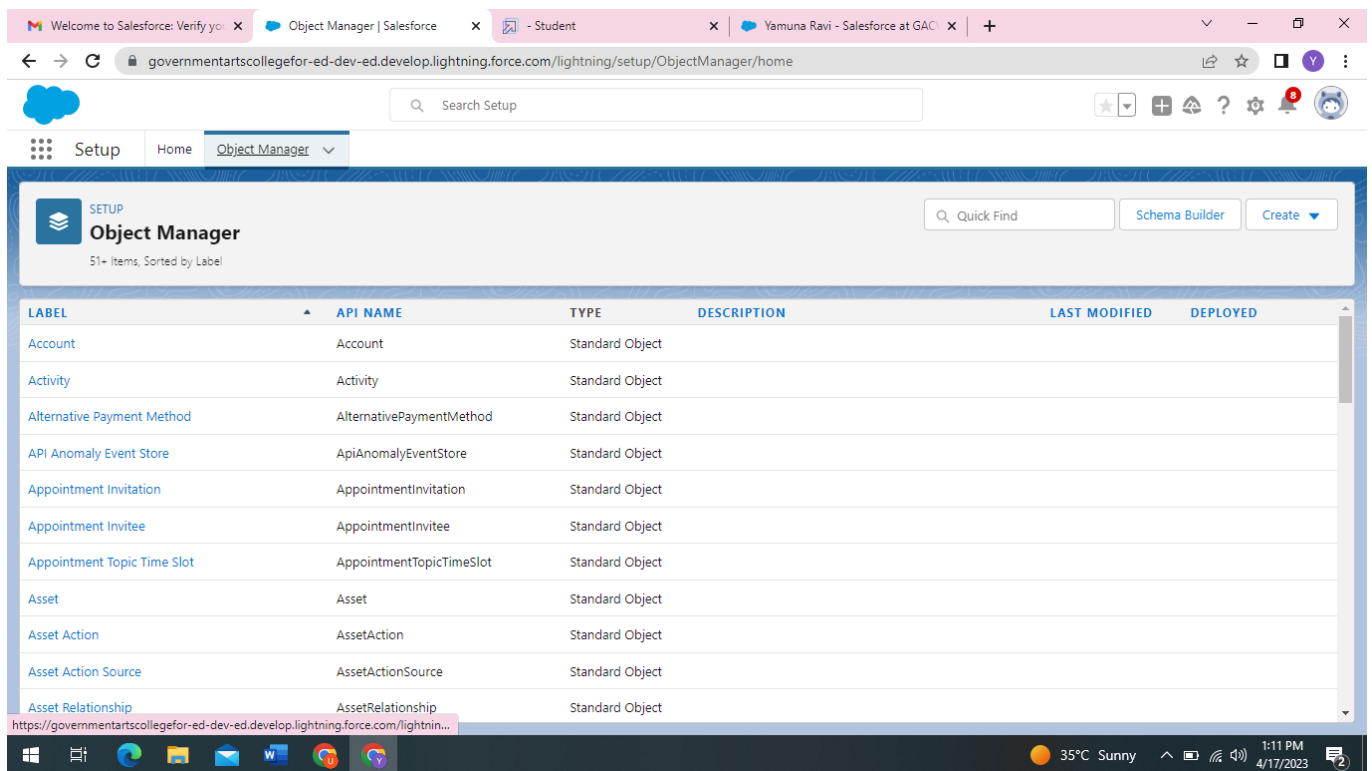
Windows taskbar with icons for Edge, File Explorer, Mail, Word, and Chrome.

28°C Clear 9:28 PM 4/16/2023

# Milestone-2

## Activity-1

Creation of object manager, Create new custom object. Next the label name and plural label has tracking.



The screenshot displays the Salesforce Object Manager interface. The browser address bar shows the URL: `governmentartscollegefor-ed-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home`. The page header includes the Salesforce logo, a search bar, and navigation tabs for Setup, Home, and Object Manager. The main content area is titled "Object Manager" and shows "51+ Items, Sorted by Label". A table lists various standard objects with columns for Label, API Name, Type, Description, Last Modified, and Deployed.

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			

I have used to data type has text and select displayed option. Next custom object is created. And select tab style and click on next. Select save option.

## Activity-2

**Fields available on Dispatch/Tracking.**

**Creation of fields on Dispatch/Tracking.**

Select your object from object selection has tracking, select the option fields and relationship. I have to select data type, checkbox has data type.

Tracking | Salesforce

governmentartscollegefor-ed-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003H6gn/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Tracking

Details

**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)		✓

Link View Button Layout

28°C Clear 10:14 PM 4/16/2023

Field in order to save, and visible to all profiles.  
Select the page layout and save it.

# Milestone-3

## Relationship b/w Objects:

### Activity-1

Creation of relationship between objects.

The screenshot shows the Salesforce Setup interface. The breadcrumb trail is **SETUP > OBJECT MANAGER**. The page title is **Tracking**. On the left sidebar, the **Fields & Relationships** option is selected. The main content area displays a table titled **Fields & Relationships** with 4 items, sorted by Field Label. The table has columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data rows are:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
sales order Name	Name	Text(80)		✓

At the bottom of the page, the status bar shows the system clock as 1:18 PM on 4/17/2023, and the weather as 35°C Sunny.

To create a master detail relationship for tracking and sales order. Select the setup option. And select fields and relationship and click select related to the

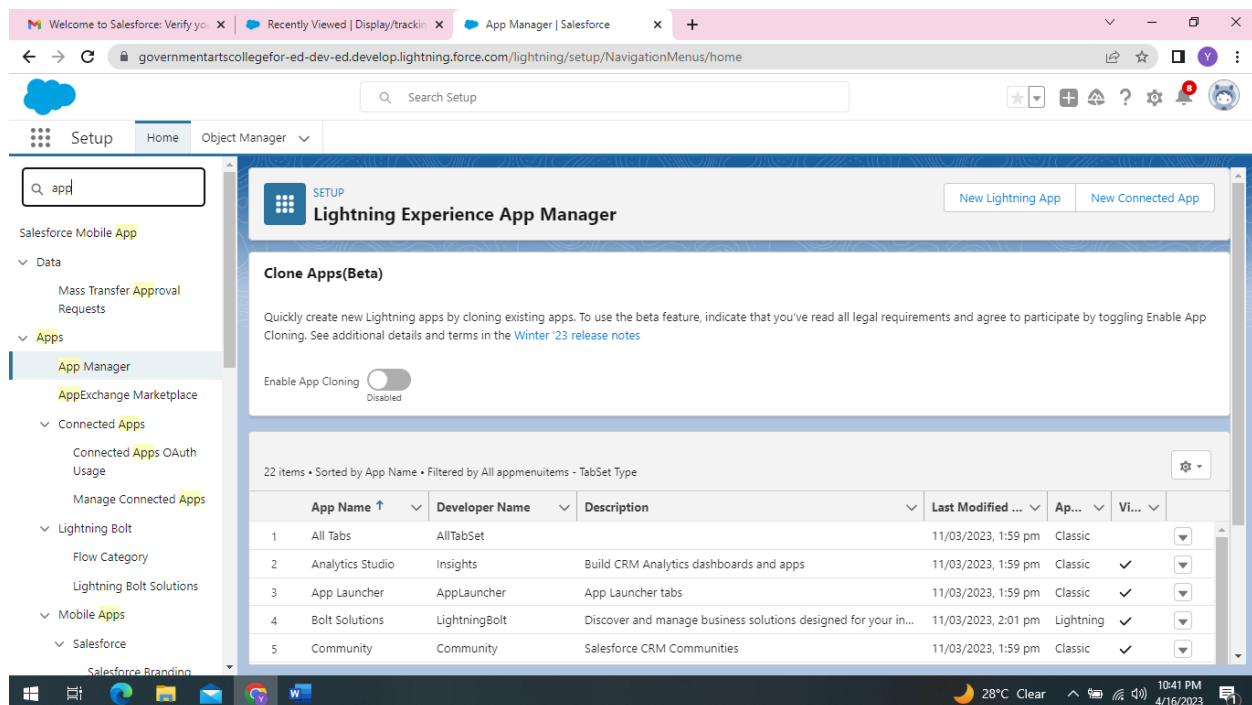
object has sales order. To select page layout in text page and save it.

## Milestone-4

### Activity-1

#### Creation of Application:

First, Setup and search for app manager and select the lightning app option, the app name has Sales app.



Upload the picture and to selected items. Profile to available items to selected items.

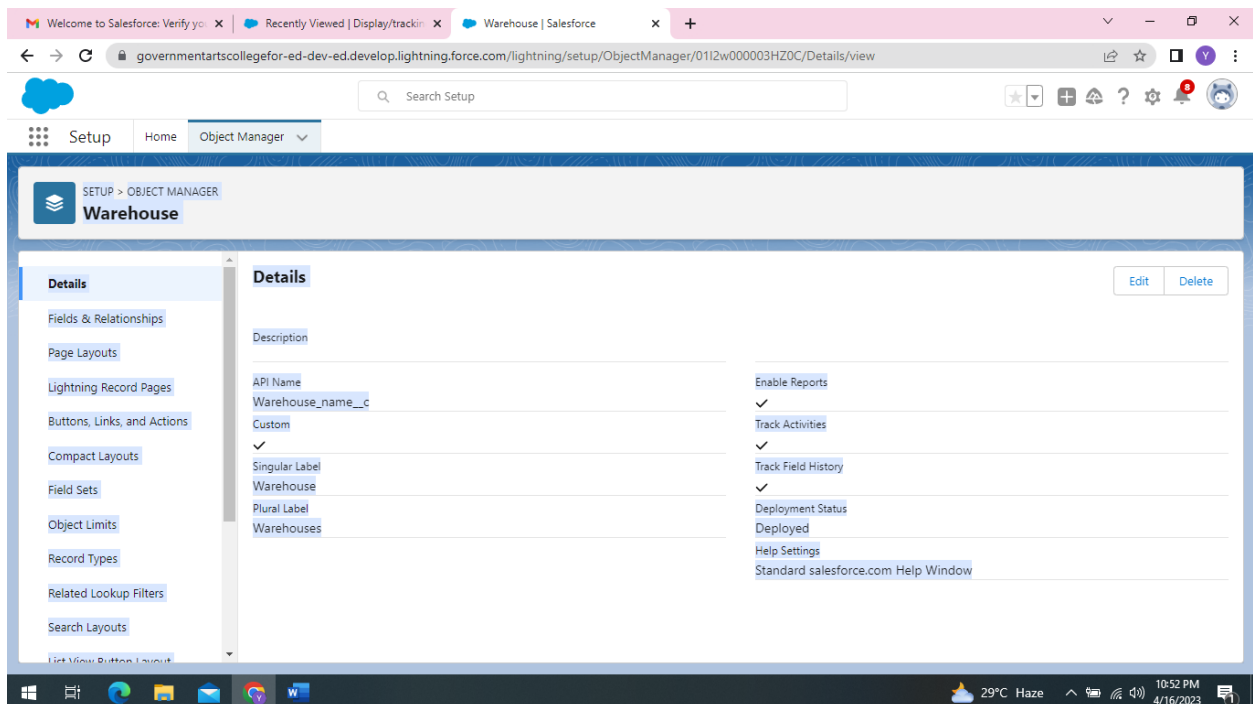
# Milestone-5

## Layouts:

## Activity-1

### Creation of Custom Tabs:

Create a Custom object tabs and select Warehouse. Tab style for any icon. Leave all defaults and save.





## Milestone-6

User:

### Activity-1

#### Creation of User:

Setup in quick find search bar. Type User and Select new User. Give the first and last name. Enter the email for email field. User name must be unique. Select the user license of salesforce. At bottom of the page check the box to create new password and notify the user immediately.

Windows taskbar: Welcome to Salesforce: Verifi... x Recently Viewed | Display/tr... x New Custom Object | Salesf... x Users | Salesforce x Profile - Student x

Browser address bar: governmentartscollegefor-ed-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home

Search Setup

Setup Home Object Manager

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

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 View

New User Reset Password(s) Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d2w0000rk67weat.7xfzngbon5f@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	P.Ravi.R.Yamuna	RP.Ra	yamuna@malar.com		✓	System Administrator
<input type="checkbox"/> Edit	RAVI.YAMUNA	teny	yamunaravi1207@gmail.com		✓	Cross Org Data Proxy User
<input type="checkbox"/> Edit	User_Integration	inte0	integration@00d2w0000rk67weat.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00d2w0000rk67weat.com		✓	Analytics Cloud Security User

New User Reset Password(s) Add Multiple Users

35°C Sunny 1:28 PM 4/17/2023

Windows taskbar: Welcome to Salesforce: Verifi... x Recently Viewed | Display/trac... x Users | Salesforce x

Browser address bar: governmentartscollegefor-ed-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2Fe%3FretURL%3D%252F005%253FisUserEnt...

Search Setup

Setup Home Object Manager

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

New User

User Edit Save Save & New Cancel

General Information

First Name Last Name Alias Email Username Nickname Title Company Department Division

Role: <None Specified> User License: XOrg Proxy User Profile: Cross Org Data Proxy 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

29°C Haze 11:05 PM 4/16/2023

# Milestone-7

## Validation Rules:

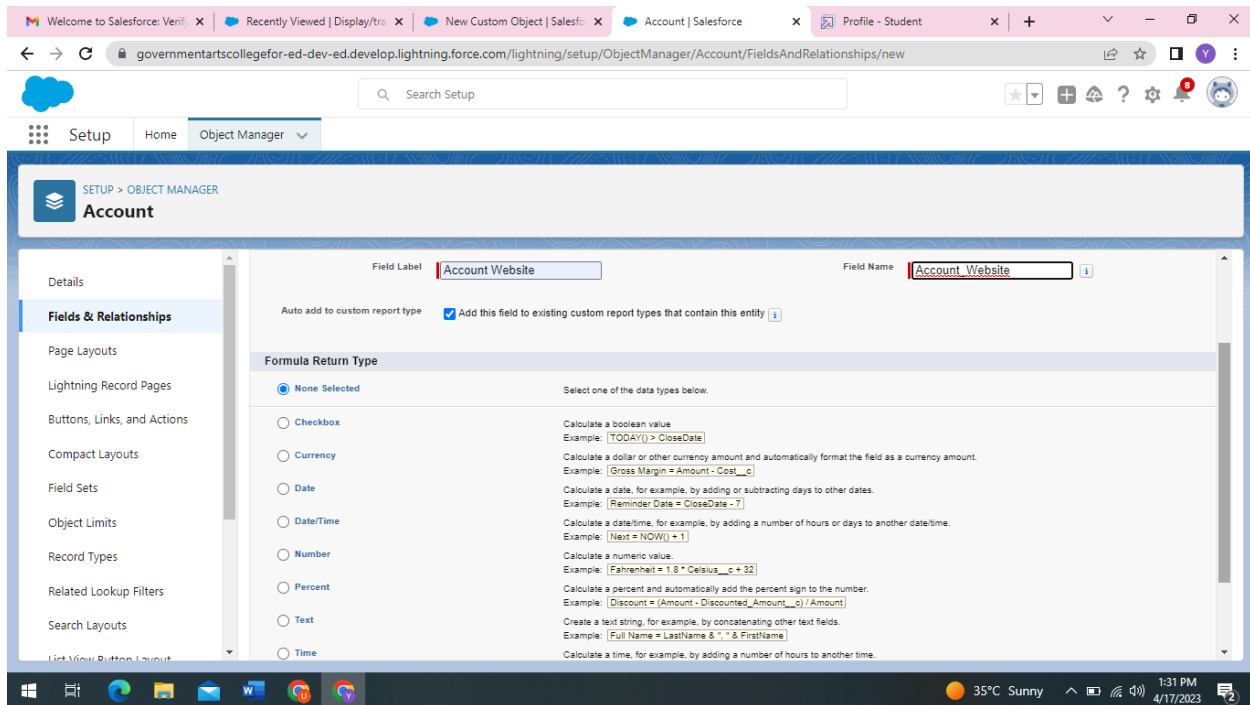
### Activity-1

#### Creation of validation rule:

Navigate to object manager and select Account object. Find Validation rule and click new, give the label name and edit formula has LEFT. Phone number must begin with select top of the field.

The screenshot shows the Salesforce Setup interface for the Account object. The left sidebar contains a navigation menu with options: 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 'SETUP > OBJECT MANAGER Account' and displays the 'Fields & Relationships' section. It shows a list of 33+ items, sorted by Field Label. The table below lists the fields and their properties.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Account Name	Name	Name		✓
Account Number	AccountNumber	Text(40)		
Account Owner	OwnerId	Lookup(User)		✓
Account Site	Site	Text(80)		
Account Source	AccountSource	Picklist		
Active	Active_c	Picklist		
Annual Revenue	AnnualRevenue	Currency(18, 0)		
Billing Address	BillingAddress	Address		
Clean Status	CleanStatus	Picklist		✓



## Activity-2

### Cross object formula:

Select object form object selection has contact. Selection the option fields and relationship. Next, select the data type and the formula has left side of the report you can find an outline pane. Select product home. And the columns warehouse name and stock availability. The warehouse is selected. And warehouse created data select all time. Click on save and run for saving the report.

Windows browser window showing the Salesforce Setup page for creating a new custom field. The browser tabs include "Welcome to Salesforce: Verify yo...", "Recently Viewed | Display/trac...", and "contact | Salesforce". The address bar shows the URL: `governmentartscollegefor-ed-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003HXgk/FieldsAndRelationships/new`. The Salesforce Setup navigation bar includes "Setup", "Home", and "Object Manager". The left sidebar shows the "Fields & Relationships" section selected. The main content area is titled "New Custom Field" and displays "Step 1. Choose the field type". Below this, it asks to "Specify the type of information that the custom field will contain." and lists several data types: "None Selected" (selected), "Auto Number", "Formula", "Roll-Up Summary", "Lookup Relationship", and "Master-Detail Relationship". Each type has a brief description. The Windows taskbar at the bottom shows the time as 11:21 PM on 4/16/2023, with a temperature of 28°C and a "Haze" weather condition.

Windows browser window showing the Salesforce Setup page for creating a new custom field, now at the "Formula Return Type" step. The browser tabs include "Welcome to Salesforce: Verifi...", "Recently Viewed | Display/tr...", "New Custom Object | Salesfo...", and "contact | Salesforce". The address bar shows the same URL as the previous screenshot. The Salesforce Setup navigation bar and left sidebar are consistent. The main content area is titled "New Custom Field" and displays "Step 2. Choose the formula return type". Below this, it asks to "Specify the type of information that the custom field will contain." and lists several formula return types: "None Selected" (selected), "Checkbox", "Currency", "Date", "Date/Time", "Number", "Percent", "Text", and "Time". Each type has a brief description and an example formula. The "Field Label" is "Account Website" and the "Field Name" is "Account\_Website". The "Auto add to custom report type" checkbox is checked. The Windows taskbar at the bottom shows the time as 1:35 PM on 4/17/2023, with a "NIFTY -0.94%" stock market indicator.

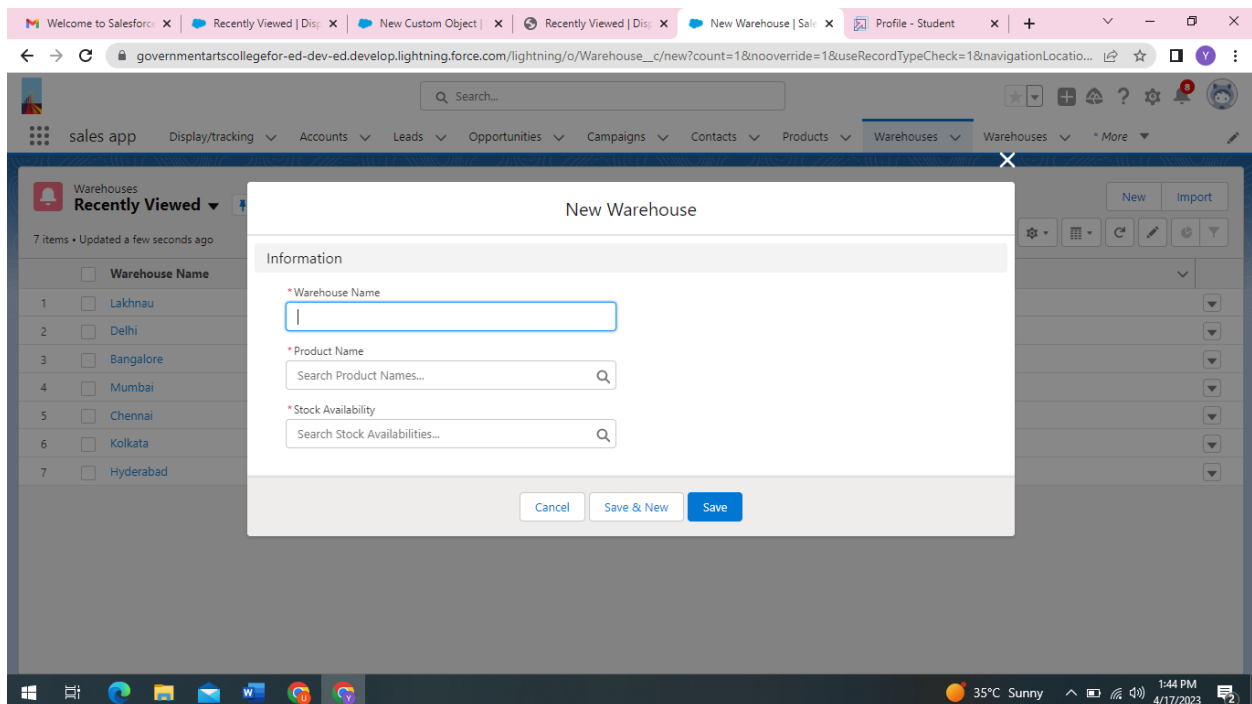
# Milestone-8

## Reports

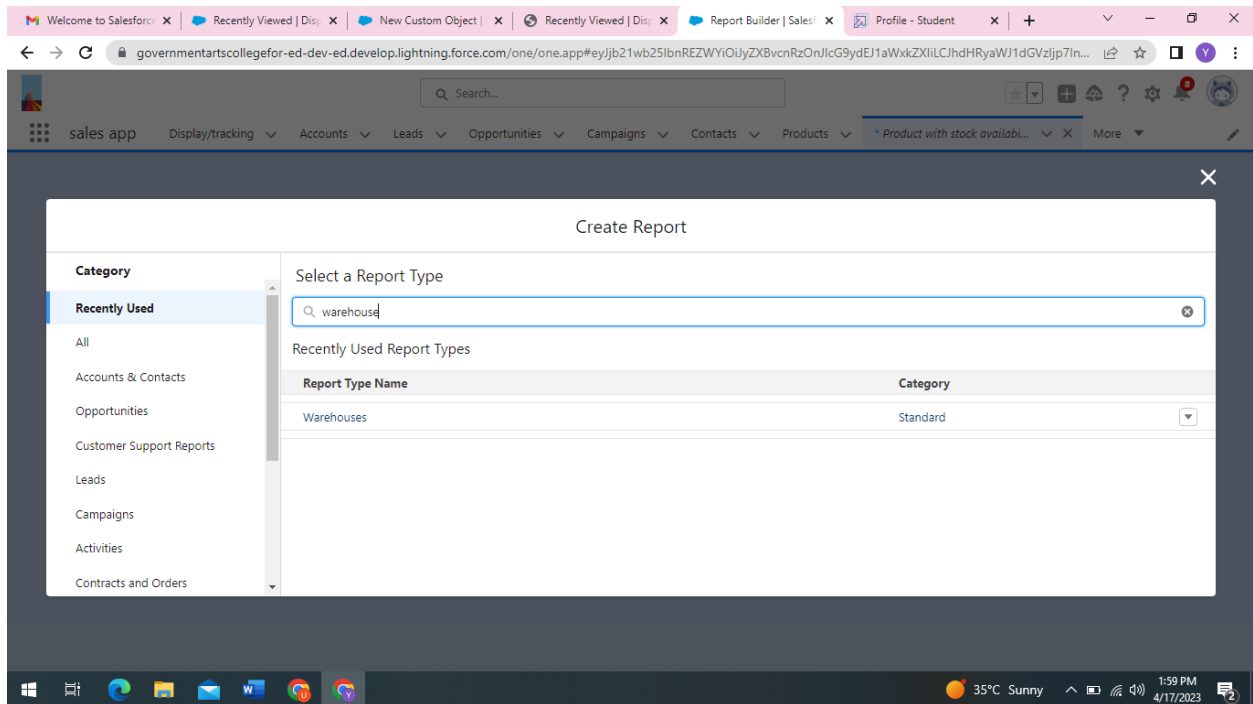
## Activity

### Creation of Reports:

Click on app launcher and search for Reports.  
And select new report for record type. Select warehouse for the report type name.



Left side of the report you can find an outline pane. Select product name and the columns warehouse name and stock available. The warehouse is selected. And warehouse click on save and run for saving the report.



Browser tabs: Welcome to Salesforce, Recently Viewed | Dis, New Custom Object, Recently Viewed | Dis, Recently Viewed | Wa, Profile - Student

Address bar: governmentartscollegefor-ed-dev-ed.develop.lightning.force.com/lightning/o/Warehouse\_\_c/list?filterName=Recent

Search bar: Search...

Navigation menu: sales app, Display/tracking, Accounts, Leads, Opportunities, Campaigns, Contacts, Products, Warehouses, Warehouses, More

Section: Warehouses Recently Viewed

Buttons: New, Import

Search this list...

7 items • Updated a few seconds ago

	<input type="checkbox"/> Warehouse Name	
1	<input type="checkbox"/> Lakhnau	▼
2	<input type="checkbox"/> Delhi	▼
3	<input type="checkbox"/> Bangalore	▼
4	<input type="checkbox"/> Mumbai	▼
5	<input type="checkbox"/> Chennai	▼
6	<input type="checkbox"/> Kolkata	▼
7	<input type="checkbox"/> Hyderabad	▼

Windows taskbar: 35°C Sunny, 1:43 PM, 4/17/2023



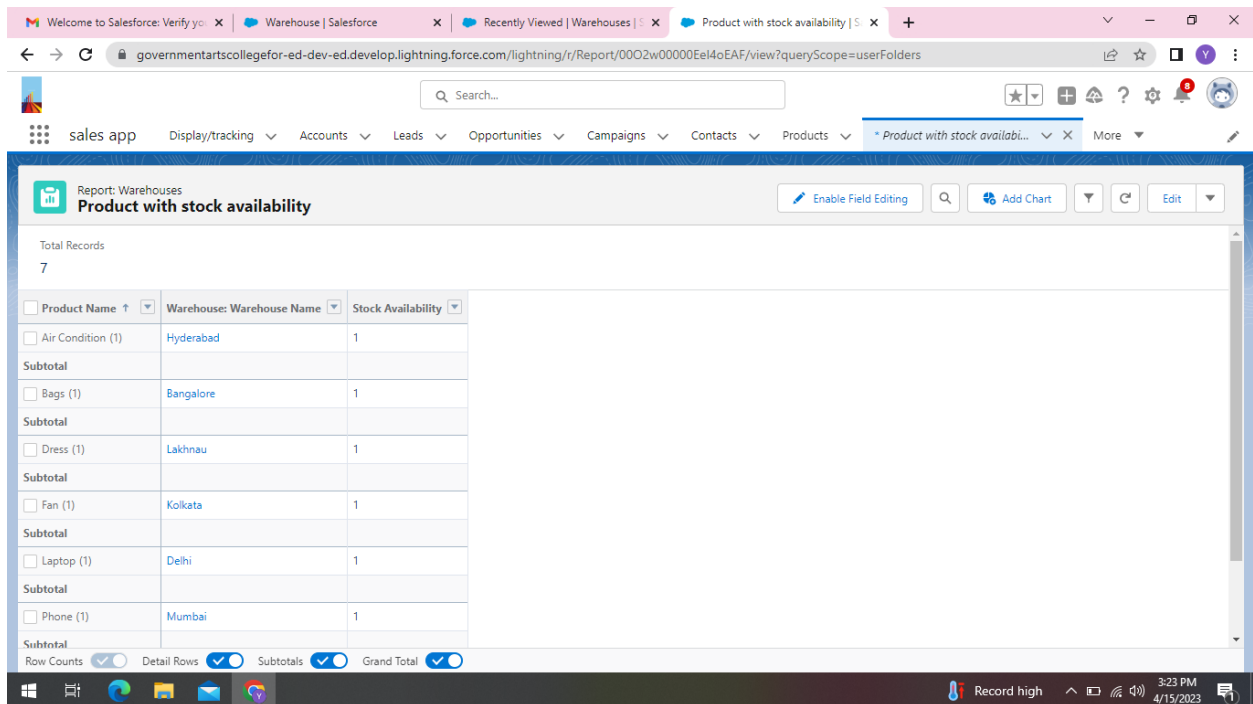
# Milestone-9

## Dashboards:

## Activity:

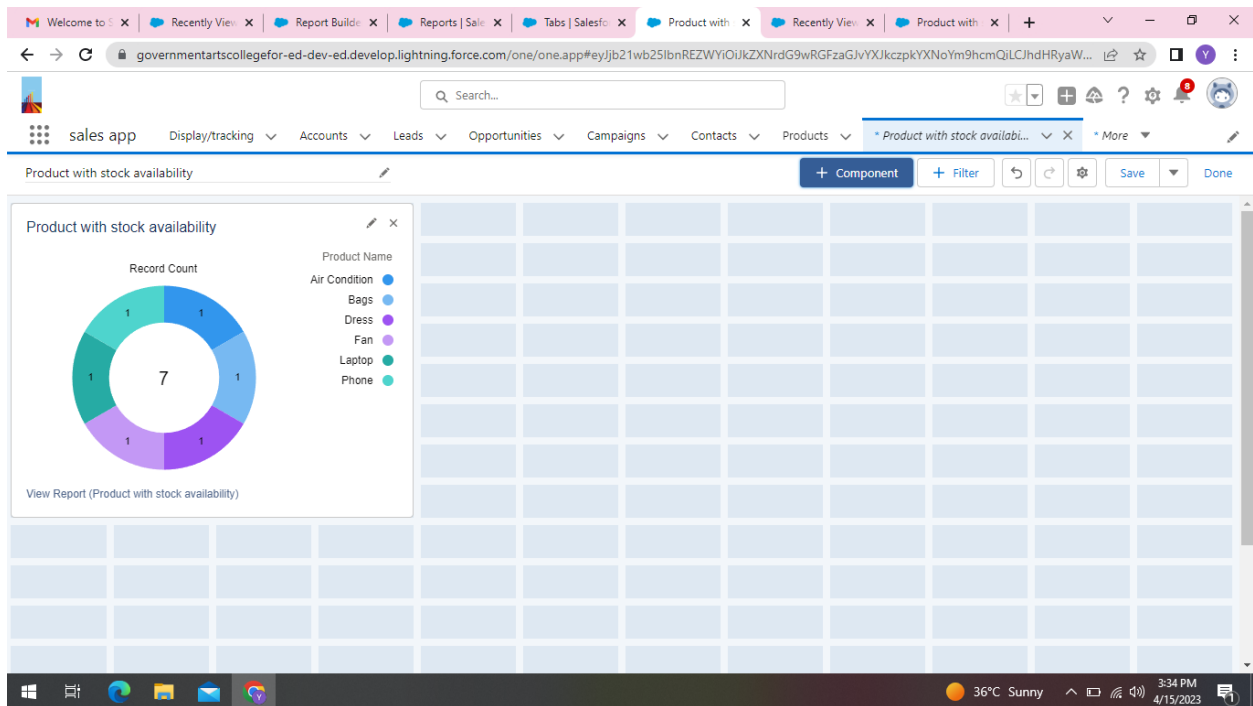
## Creation of Dashboards:

Click on app and search for dashboards. Select the new dashboard option. The dashboard has a Products with stock availability. And select create option. Add component and for report select passport with locations. Select the Don't Chart in display as section.



Product Name	Warehouse: Warehouse Name	Stock Availability
Air Condition (1)	Hyderabad	1
Subtotal		
Bags (1)	Bangalore	1
Subtotal		
Dress (1)	Lakhnau	1
Subtotal		
Fan (1)	Kolkata	1
Subtotal		
Laptop (1)	Delhi	1
Subtotal		
Phone (1)	Mumbai	1
Subtotal		

The value is record count and sliced by product name, leave the default values. Click on add, and save the dashboard.



## 4.Trailhead Profile Public URL

**Team Lead**- <https://trailblazer.me/id/yravi23>

**Team Member 1**- <https://trailblazer.me/id/tsuba64>

**Team Member 2**- <https://trailblazer.me/id/uusha8>

**Team Member 3**- <https://trailblazer.me/id/vithc>

## Retail Management Application Using Salesforce

### 5. ADVANTAGES

- Retail is the maximum direct enterprise shape among the service provided and the purchaser.
- Retailing affords a facility to have face -to-face interaction.
- Consumers depend on stores for their wished items.
- An advantage of the retail inventory method is that does not require a physical inventory.

- The retail inventory method only requires an organization to record the retail prices of inventory items.

## DISADVANTAGE

- The retail inventory method is only accurate if all pricing across the board is the same.
- All pricing changes occur at the same rate.
- For example, depreciation, markdowns, product damage and theft can affect the price of the retail inventory.

## 6. APPLICATIONS

- Managing inventory and having complete visibility into every stage of order fulfillment is a key benefit of a CRM in retail.

- It's not uncommon for their inventory management-having both in one allows for a better customer experience.
- Salesforce can be used to manage orders from retail stores and distributors, including tracking orders, processing payments, and managing inventory levels.

## 7. CONCLUSION

- Changing the sales force structure presents many challenges. However, sales managers should not be afraid to change a structure that is outdated.
- As stated earlier, progressive sales managers reevaluate the sales force structure every two to three years.
- Even three years may be too long given how quickly the Internet is changing the selling landscape.

## 8. FUTURE SCOPE

- Supervisory, client communication, merchandise shipment, sales, management, and administrative services are all options for candidates with a retail management background.
- More than 2 million jobs are available in retail management around the world.
- The future of retail will feature a high level of online penetration.
- The best suppliers will establish direct-to-consumer relationships, where retailers will no longer serve as the gatekeeper to the customer.