

**Kallam Haranadhareddy Institute Of Technology**

**A CRM application for THECHAISHOP&CO**

**By**

**Y L V N P Vyshnavi**

[218x1a42b1@khitguntur.ac.in](mailto:218x1a42b1@khitguntur.ac.in)

**Mahanthi Leela Krishna Prasad**

[218x1a4271@khitguntur.ac.in](mailto:218x1a4271@khitguntur.ac.in)

**Sk. Nagul Meeravali**

[228x5a4209@khitguntur.ac.in](mailto:228x5a4209@khitguntur.ac.in)

**Nalagatla Suresh**

[218x1a42b8@khitguntur.ac.in](mailto:218x1a42b8@khitguntur.ac.in)

# Project Overview

This project aims to develop a **Customer Relationship Management (CRM) application** for THECHAISHOP&CO to streamline customer interactions, track sales, and enhance business operations. Built on **Salesforce CRM**, the system will include **customer management, order tracking, sales analytics, loyalty programs, and automated workflows**. It will provide **custom dashboards, reports, and mobile accessibility** to improve efficiency and customer engagement. The application will help the business enhance customer retention, optimize sales processes, and make data-driven decisions.

# INTRODUCTION

THECHAISHOP&CO is a growing business that aims to enhance customer relationships, streamline operations, and improve sales tracking. To achieve this, we are developing a **Customer Relationship Management (CRM) application** tailored to their business needs.

## Objectives

- **Customer Management:** Store and manage customer details, preferences, and interactions.
- **Order Tracking:** Maintain a history of customer orders for better service and personalization.
- **Sales Management:** Track sales performance and analyze revenue trends.
- **Loyalty Program:** Implement a rewards system to enhance customer retention.
- **Feedback & Support:** Enable customers to provide feedback and request support seamlessly.

## Methodology

1. **Requirements Gathering:** Conducted interviews and surveys with potential food donors, volunteer organizations, and beneficiaries to understand their needs and constraints.
2. **System Design:** Designed a Salesforce-based solution to manage the entire process, from food donation to distribution.
3. **Implementation:** Developed and tested the solution using Salesforce's features like objects, reports, dashboards, and automation tools.
4. **Full Deployment:** Rolled out the final solution to all stakeholders.

## Salesforce Key Features and Concepts Utilized

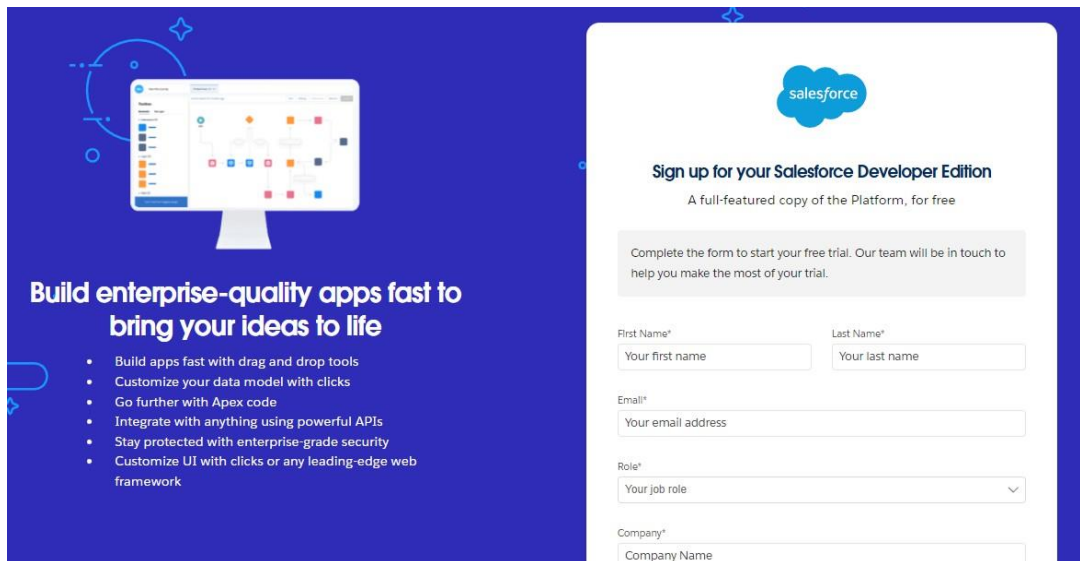
To build a robust CRM Application for THECHAISHOP&CO, the following Salesforce features and concepts were implemented:

- **Custom Objects and Fields** – Created objects for Customers, Orders, Transactions, and added custom fields to store relevant data.
- **Lightning App** – Developed a custom Lightning App for easy navigation and a streamlined user experience.
- **Tabs** – Configured tabs for quick access to Customers, Orders, and Reports.
- **Global Picklist** – Standardized values across multiple objects (e.g., Order Status: Pending, Shipped, Delivered).
- **Page Layouts** – Customized layouts to display relevant fields and sections based on user roles.
- **Record Types** – Created different record types for Customer Accounts, Order Categories, and other business cases.
- **Email Templates** – Designed automated email templates for order confirmations, customer feedback requests, and promotions.
- **Flows** – Implemented Salesforce Flows to automate processes such as order approvals and follow-up emails.
- **Reports and Dashboards** – Developed interactive reports and dashboards to track sales trends, customer activity, and business performance.

## Detailed Steps to Solution Design

### 1. Salesforce developer account creation and activation:

- To create developer org:
- Go to <https://developer.salesforce.com/signup>
- On the sign up form, enter the following details:



The image shows the Salesforce Developer Edition sign-up page. On the left, there is a blue banner with the text "Build enterprise-quality apps fast to bring your ideas to life" and a list of features. On the right, there is a white 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, there is a message: "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\* (Your first name), Last Name\* (Your last name), Email\* (Your email address), Role\* (Your job role), and Company\* (Company Name).

**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

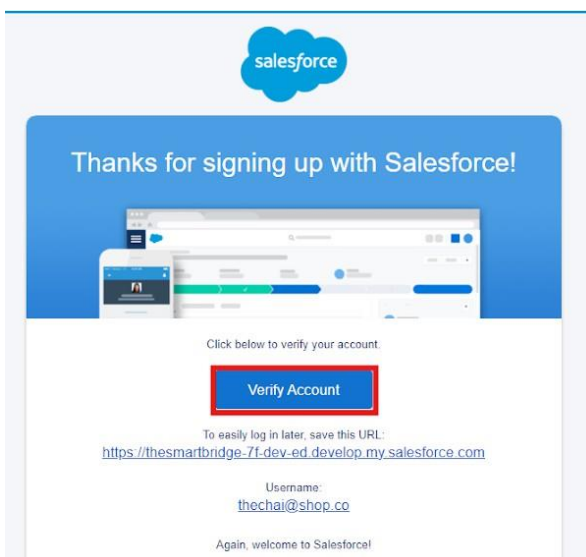
Last Name\*  
Your last name

Email\*  
Your email address

Role\*  
Your job role

Company\*  
Company Name

- For account activation, go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.
- Click on Verify Account.
- Give a password and answer a security question and click on change password



The image shows the Salesforce account verification page. It has a blue header with the Salesforce logo and the text "Thanks for signing up with Salesforce!". Below the header, there is a screenshot of the Salesforce interface. The main text says "Click below to verify your account." and there is a blue button labeled "Verify Account". Below the button, there is a URL: "https://thesmartbridge-7f-dev-ed.develop.my.salesforce.com". The username is "thechai@shop.co". At the bottom, it says "Again, welcome to Salesforce!".

**Thanks for signing up with Salesforce!**

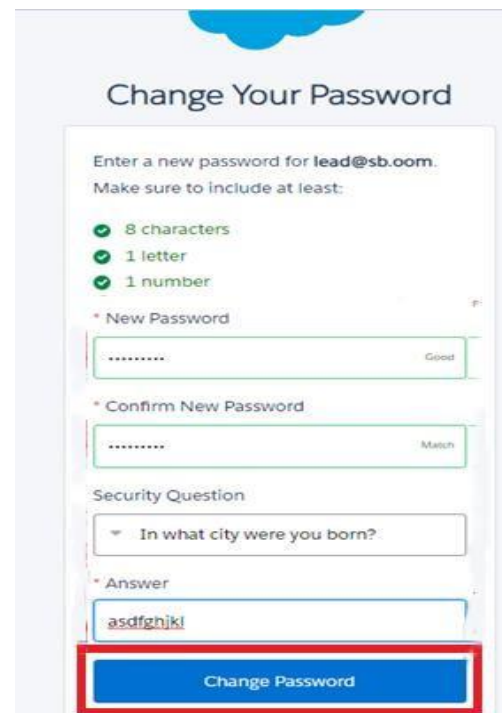
Click below to verify your account.

**Verify Account**

To easily log in later, save this URL:  
<https://thesmartbridge-7f-dev-ed.develop.my.salesforce.com>

Username:  
[thechai@shop.co](mailto:thechai@shop.co)

Again, welcome to Salesforce!



The image shows the Salesforce change password page. It has a blue header with the Salesforce logo and the text "Change Your Password". Below the header, there is a form with the title "Enter a new password for lead@sb.com. Make sure to include at least:". The requirements are: 8 characters, 1 letter, and 1 number. The form fields include: New Password, Confirm New Password, Security Question (In what city were you born?), and Answer (asdfghjkl). At the bottom, there is a blue button labeled "Change Password".

**Change Your Password**

Enter a new password for **lead@sb.com**.  
Make sure to include at least:

- ✓ 8 characters
- ✓ 1 letter
- ✓ 1 number

\* New Password  
Goood

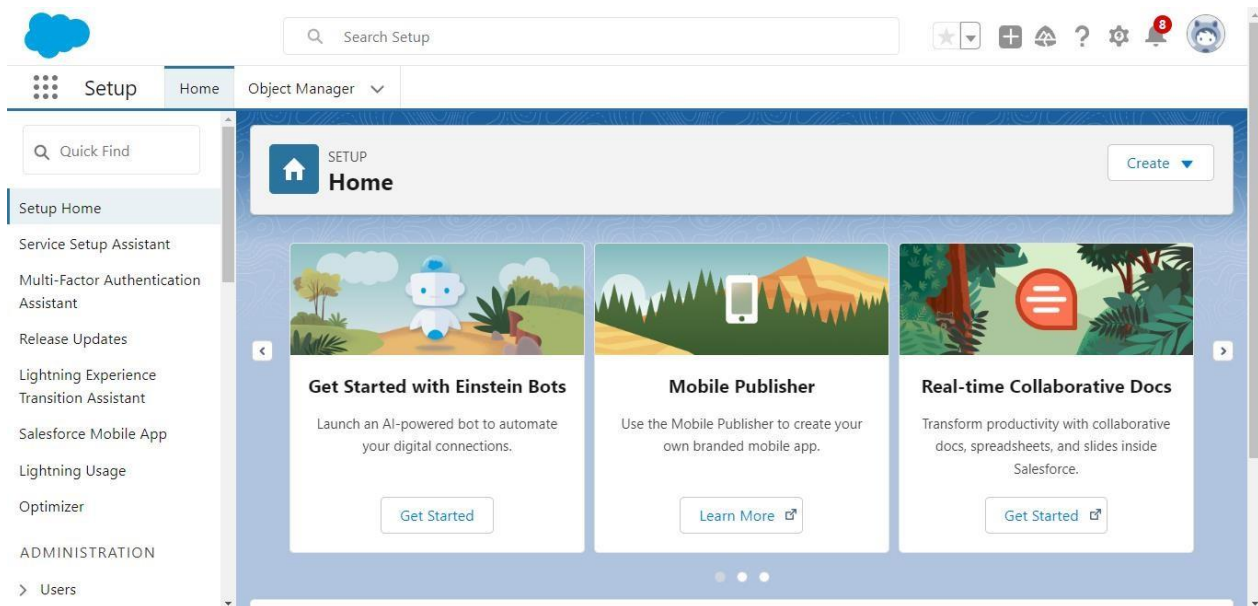
\* Confirm New Password  
Match

Security Question  
In what city were you born?

\* Answer  
asdfghjkl

**Change Password**

- Then you will redirect to your salesforce setup page.



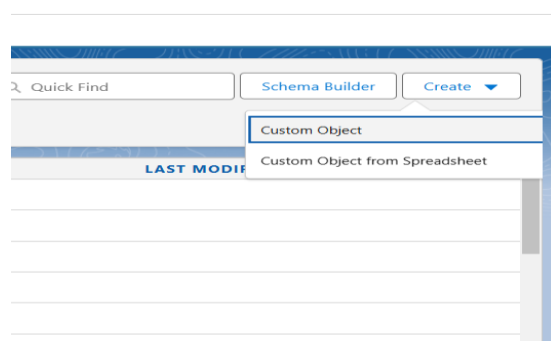
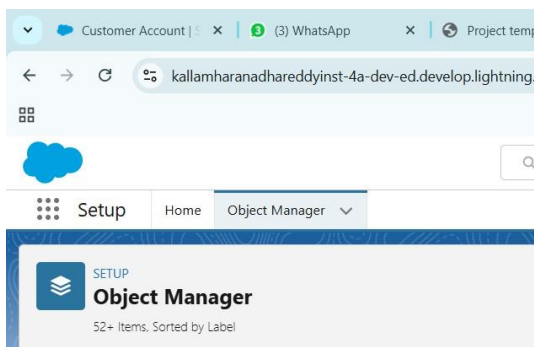
## 2. Custom object creation:

The custom objects that are created are –

- Employer account object
- Customer account object
- Enterprise account object

To create custom object,

Go to salesforce org and click gear icon. Then go to object manager tab and click create | Custom object.



- Label: Employer Account
- Plural Label: Employer Accounts
- Enter Record Name Label and Format
- Record Name: Employer Account Name
- Data Type: Text
- In Optional features: check the boxes for Allow Reports | Allow Activities | Track Field History.
- Search Status: check the box for Allow Search.
- Save

The image shows two screenshots of the Salesforce Setup interface. The top screenshot displays the configuration for the 'Employer Account' object. The bottom screenshot shows the 'New Custom Object' form.

**Top Screenshot: Employer Account Configuration**

**Details**

Description

API Name: Employer\_Account\_\_c

Custom: ☒

Singular Label: Employer Account

Plural Label: Employer Accounts

Enable Reports: ☒

Track Activities: ☒

Track Field History: ☒

Deployment Status: Deployed

Help Settings: Standard salesforce.com Help Window

**Bottom Screenshot: New Custom Object Form**

**Custom Object Definition Edit**

**Custom Object Information**

The singular and plural labels are used in tabs, page layouts, and reports.

Label:  Example: Account

Plural Label:  Example: Accounts

Starts with vowel sound: ☐

The Object Name is used when referencing the object via the API.

Object Name:  Example: Account

Description:

Context Sensitive Help Setting: ☒ Open the standard Salesforce.com Help & Training window  
☐ Open a window using a Visualforce page

Content Name:

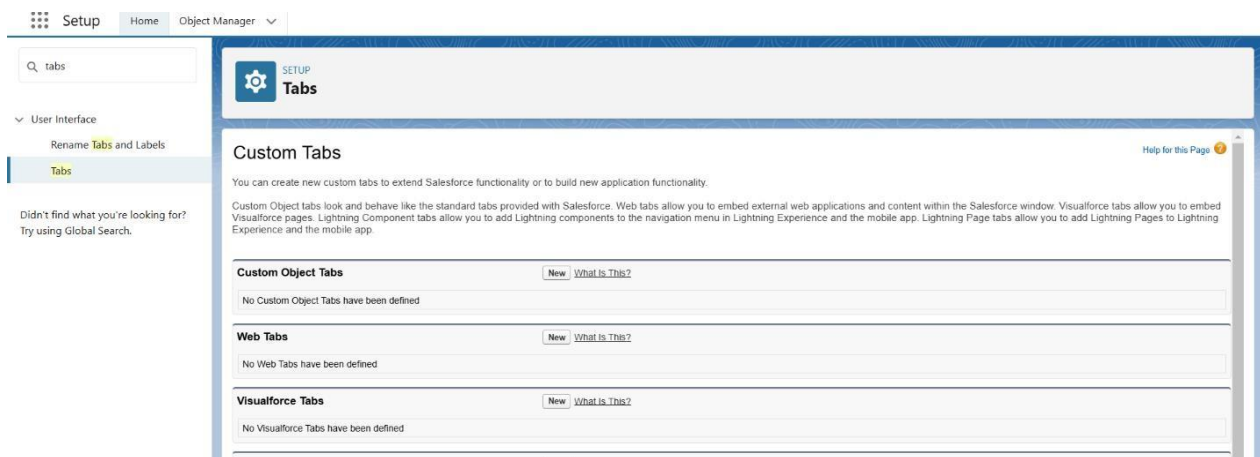
**Enter Record Name Label and Format**

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Now repeat the same steps to create customer account object and enterprise account object.

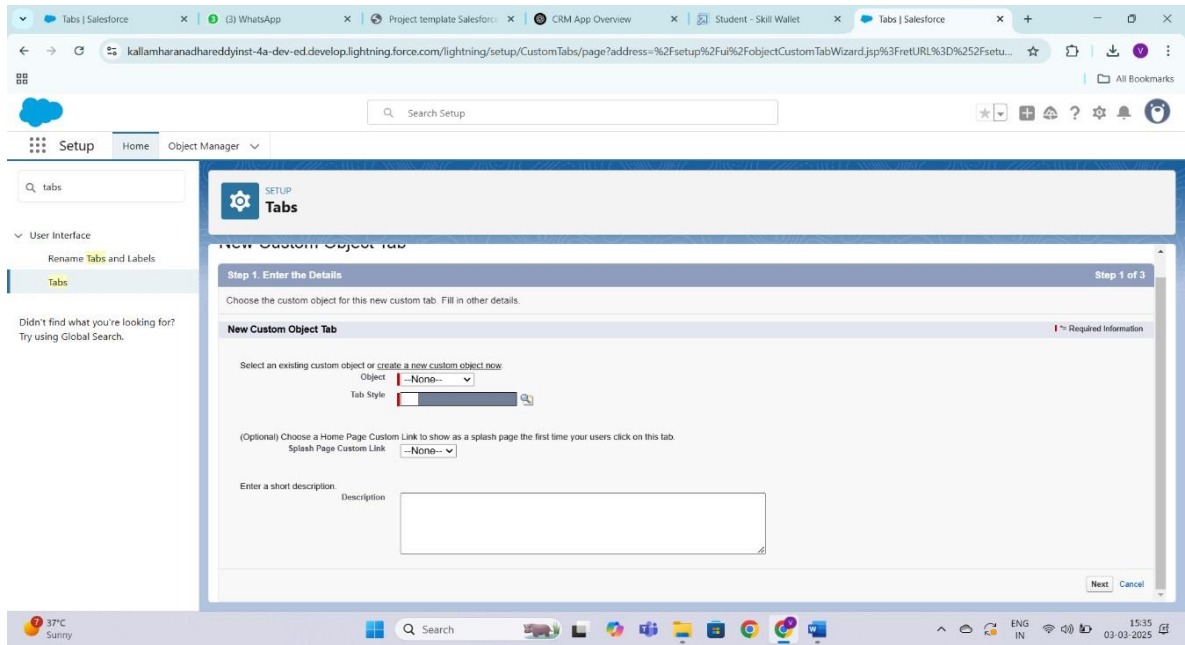
### 3. Custom tabs creation:

- Go to setup page > Type Tabs in Quick Find bar > click on tabs > New (under custom object tab)

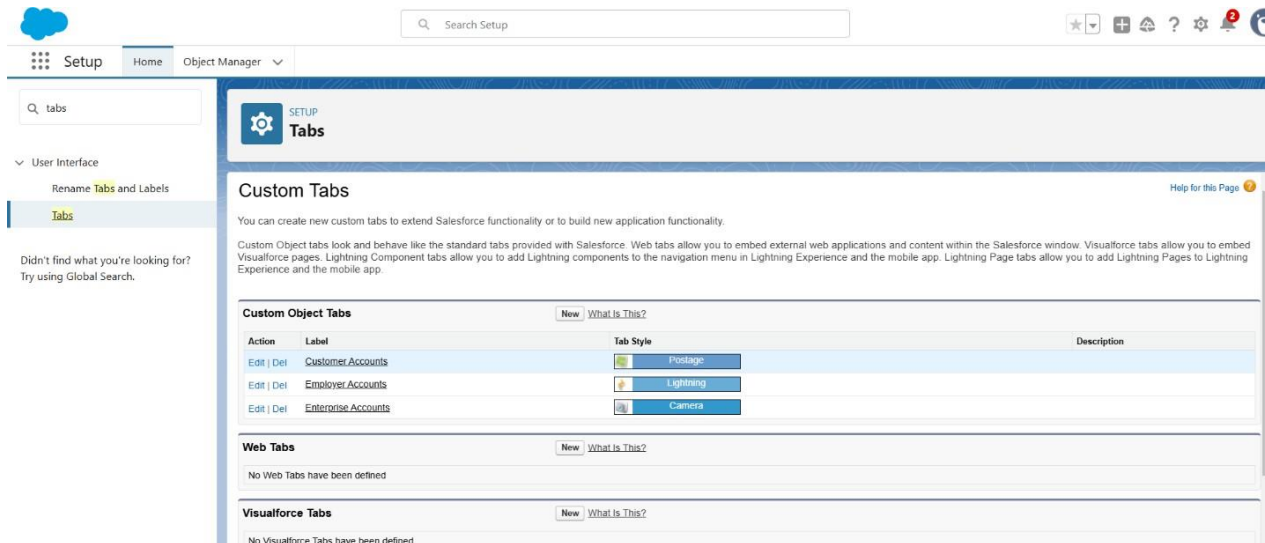


- Select Object (Employer Accounts) > Select the tab style > Next (Add to profiles page) keep it as default > Next (Add to Custom App) uncheck the include tab.



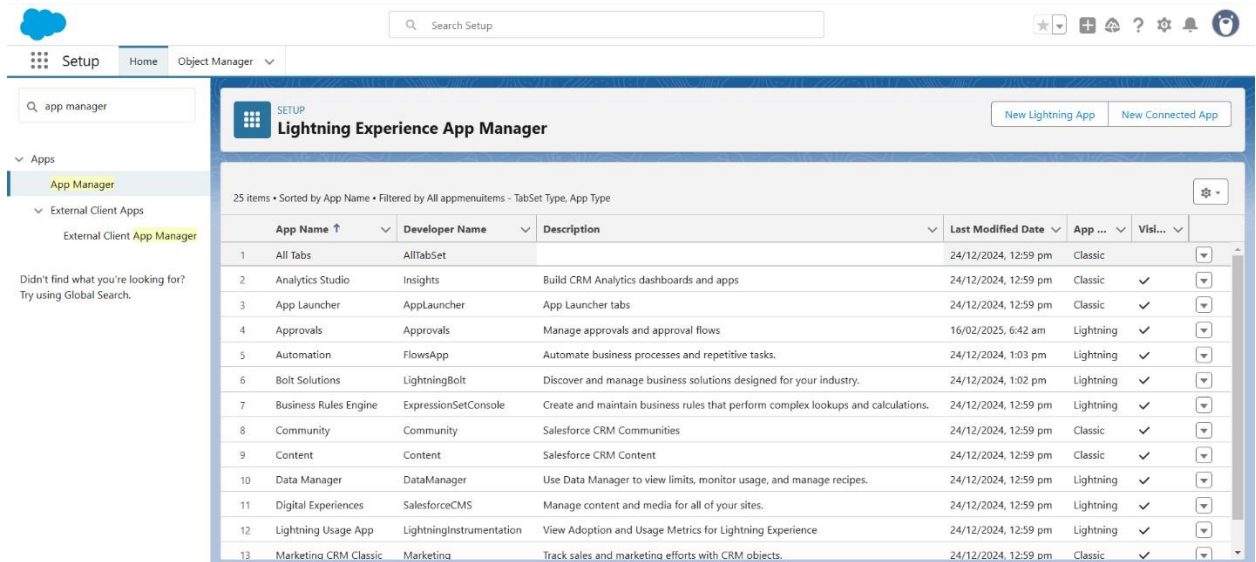


- Click save.
- Now repeat the same steps for customer account and enterprise account.

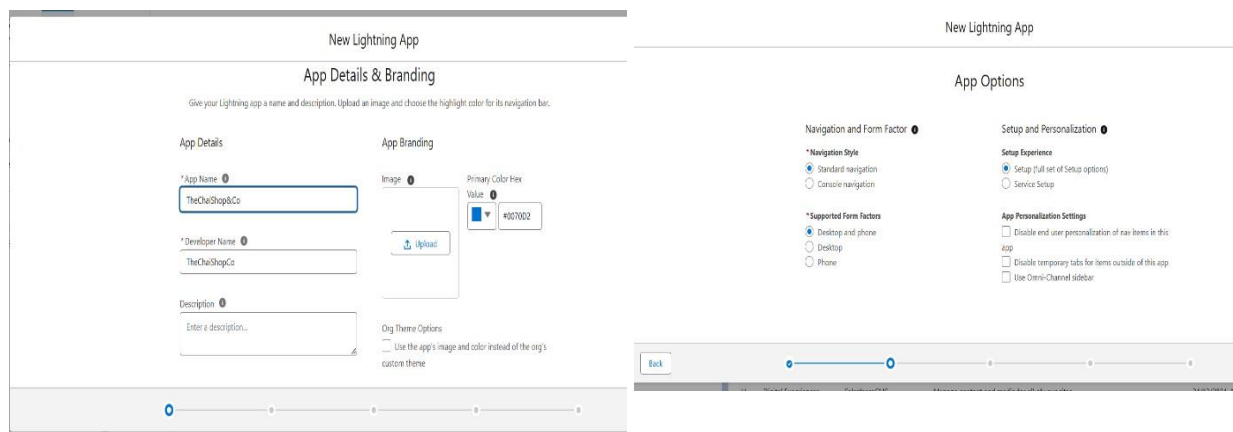


## 4. Create a Lightning app:

- Go to quick find and search “app manager”. Select it.
- Then click on “New Lightning app”



- Fill the app name in app details and branding as follow  
 App Name: TheChaiShop&Co  
 Developer Name: Auto Populates  
 Add Primary color Hex or leave it to default.  
 Then click Next.
- In App options  
 Navigation style: Standard navigation  
 Setup experience: setup  
 Supporters form factors: Desktop and phone  
 Then click Next



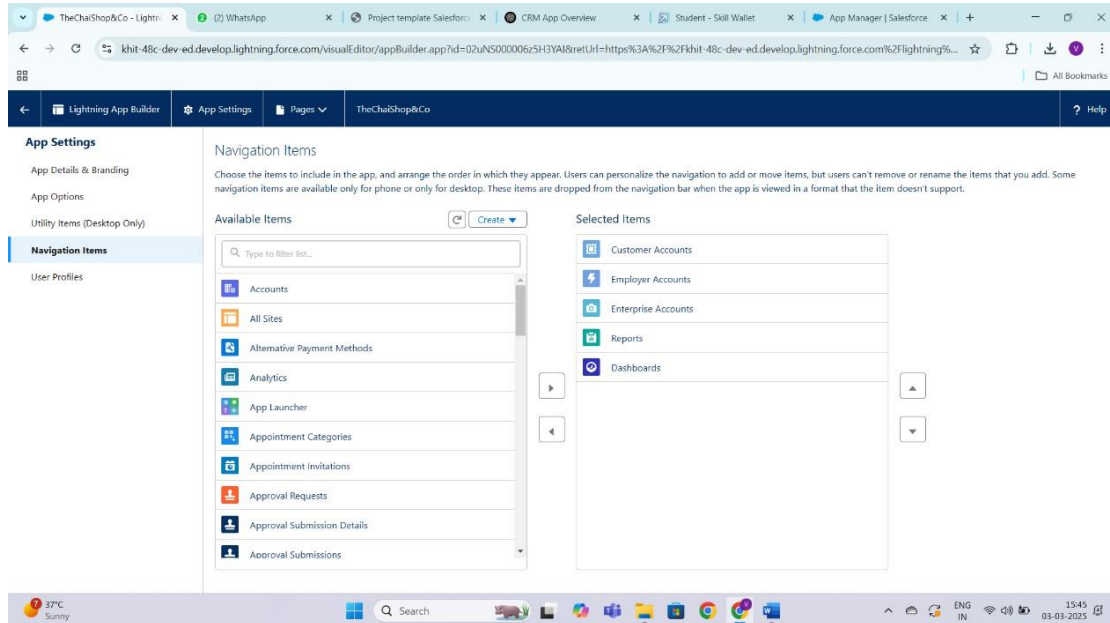
- Navigation items  
 Select the created Custom Objects and required standard objects  
 Customer Accounts

# Employer Accounts

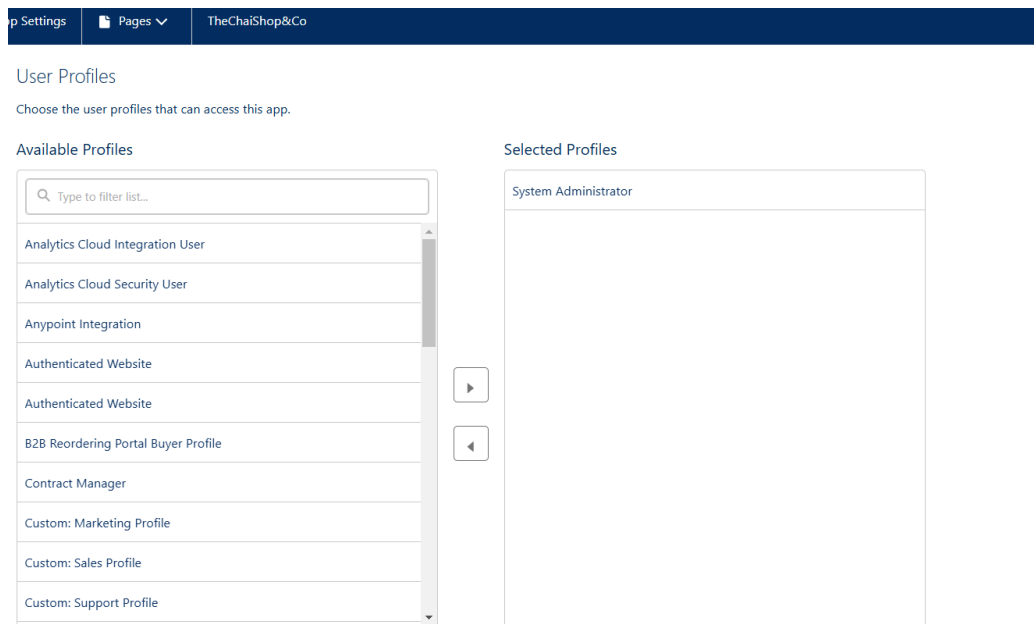
# Enterprise Accounts

# Reports

# Dashboards



- To Add User Profiles: System Administrator
- Click Save & Finish.



## 5. Global picklist creation:

- In Quick find box search for: Picklist value sets and click New.

The screenshot shows the Salesforce Setup interface. In the left sidebar, the 'Setup' menu is open, and 'Picklist Value Sets' is highlighted under the 'Objects and Fields' section. The main content area is titled 'Picklist Value Sets' and includes a 'New' button. Below the button is a table with columns 'Action', 'Label', and 'Description'. The table lists several global value sets: 'Gender', 'Items', 'Payment Mode', 'Type of Items', and 'Deleted Global Value Sets (d)'. Each row has 'Edit' and 'Delete' links. A 'View' dropdown is set to 'All', and a 'Create New View' link is present. A alphabetical index bar is visible at the top right of the table area.

- Label: Gender
- Name: Auto Populates
- Values: Male
- Female
- Others
- Click Save & New.

The screenshot shows the 'Global Value Set Edit' page in Salesforce Setup. The left sidebar is the same as the previous screenshot. The main content area is titled 'Global Value Set' and includes a 'Global Value Set Edit' section with 'Save', 'Save & New', and 'Cancel' buttons. The 'Information' section contains fields for 'Label' (Gender), 'Name' (Gender), and 'Description'. Below these fields is a 'Values' section with a text area containing the text: 'Enter values, with each value separated by a new line'. The text area contains the following values: 'Male', 'Female', and 'Others'. A red asterisk icon indicates required information.

Now repeat the same steps for three more global picklist values with the following details:

Label: Items

Name: Auto populates

Values: Platinum Tea Powder

- Double Delight Tea Powder
- Super Dust Tea Powder
- Osmania Biscuits (Value Pack)
- Osmania Biscuits (Premium Pack)
- Dry Fruit Biscuits
- Fruit Biscuits
- Salt Biscuits
- Multigrain Biscuits
- Ragi Biscuits
- Double Choco Chip Cookies
- Butter Almond Cookies
- Melting Moments Cookies
- Honey Oats Cookies
- Delight Box
- Signature Box
- Assorted Box

Click Save & New.

Label: Payment Mode

Name: Auto populates

Values: Gpay

PhonePe

Paytm

Credit or Debit card

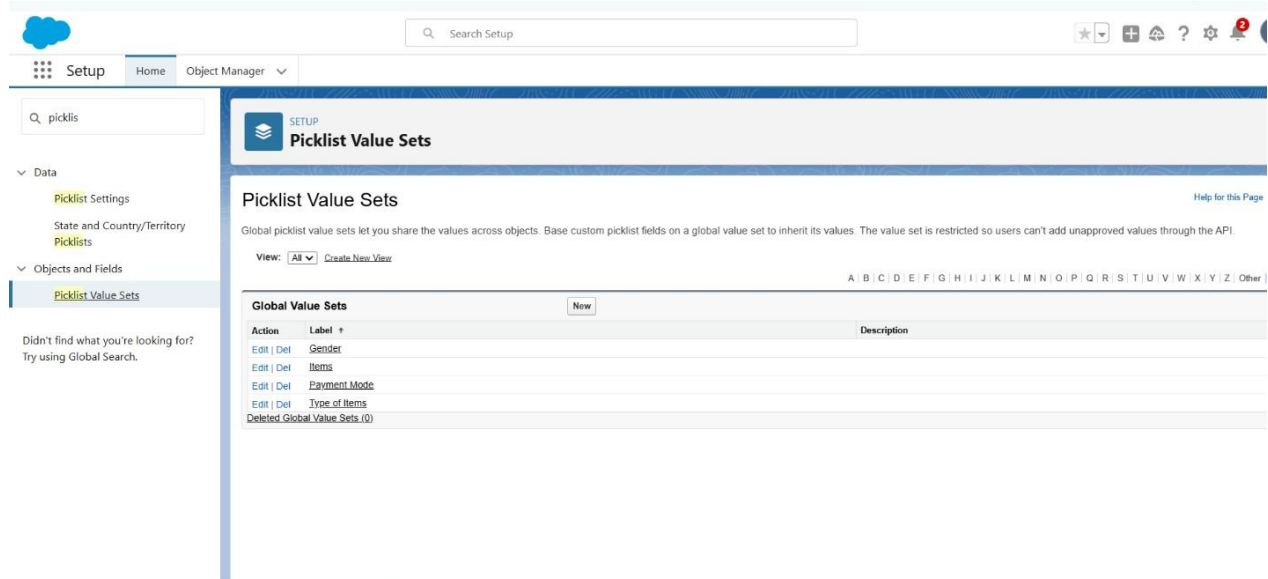
Cash.

Click Save & New.

Label: Type of Items

Name: Auto populates

Values: Tea powder  
Cookies  
Gift Hampers  
Click Save.



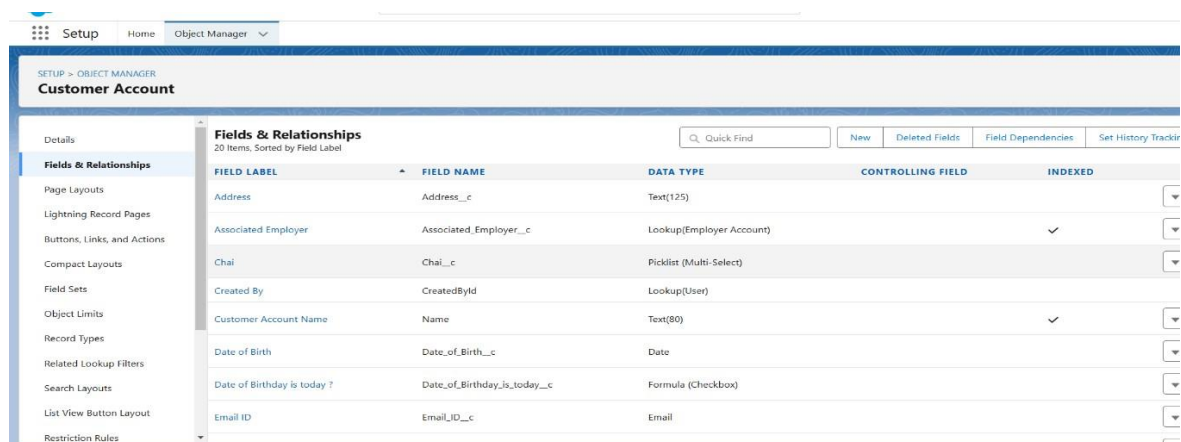
The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'picklis' and a list of navigation items: Data, Picklist Settings, State and Country/Territory, Picklists, Objects and Fields, and Picklist Value Sets. The main content area is titled 'Picklist Value Sets' and includes a 'Global Value Sets' table. The table has columns for Action, Label, and Description. The rows are: Edit | Del Gender, Edit | Del Items, Edit | Del Payment Mode, Edit | Del Type of Items, and Deleted Global Value Sets (0). A 'New' button is located above the table. The top of the page has a 'Search Setup' bar and a navigation bar with 'Setup', 'Home', and 'Object Manager'.

## 6. Fields & Relationships:

In your Salesforce org, click gear icon on the top left and select Setup to open Setup.

From the object manager page, In the Quick Find box, Search for the custom object you just created: Customer Account

From the sidebar, click Fields & Relationships and click new.



The screenshot shows the Salesforce Setup interface for the 'Customer Account' object. The left sidebar has a search bar with 'Customer Account' and a list of navigation items: 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, and Restriction Rules. The main content area is titled 'Fields & Relationships' and includes a table with columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The rows are: Address, Associated Employer, Chai, Created By, Customer Account Name, Date of Birth, Date of Birthday is today?, Email ID, and Email. A 'New' button is located above the table. The top of the page has a 'Search Setup' bar and a navigation bar with 'Setup', 'Home', and 'Object Manager'.

Then select the suitable datatype for the field. Click next and fill in the details.

The screenshot shows the Salesforce Setup interface for configuring a new field for the 'Customer Account' object. The 'Fields & Relationships' section is active. The 'Field Label' is 'First Name', 'Length' is 25, and 'Field Name' is 'First\_Name'. The 'Required' checkbox is checked. The 'Unique' checkbox is unchecked. The 'External ID' checkbox is unchecked. The 'Default Value' is set to 'Show Formula Editor'. The 'Restriction Rules' section is empty.

Repeat the same steps for all the fields in all the objects.

**The fields to be created for employer account object are:**

1. First Name (Text)
2. Last Name (Text)
3. Gender (Picklist)
4. Phone Number (Phone)
5. Email ID (email)
6. Aadhar Number (Text)
7. DOB (Date)
8. Pan details (Text)
9. Designation (Picklist)(Values: Manager, Finance & Accounting, Kitchen staff, Cashier,Servers)  
Values should be separated by new ine.
10. Salary (Currency)

**The fields for customer account object are:**

1. First Name (Text)
2. Last Name (Text)
3. Gender (Picklist)
4. DOB (Date)

5. Phone Number (Phone)
6. Date of birthday is today? (Formula)

Formula:

```
IF(
AND(
DAY( TODAY() ) = DAY( Date_of_Birth__c ) ,
MONTH ( TODAY() ) = MONTH( Date_of_Birth__c )),
TRUE,
FALSE)
```

Simple Formula   Advanced Formula

Insert Field   Insert Operator ▼

Date of Birth is today? (Checkbox) =

```
IF (
AND (
DAY( TODAY() ) = DAY( Date_of_Birth__c ) ,
MONTH ( TODAY() ) = MONTH( Date_of_Birth__c )),
TRUE,
FALSE)
```

Functions  
-- All Function Categories --  
ABS  
ACOS  
ADDMONTHS  
AND  
ASCII  
ASIN  
Insert Selected Function

Check Syntax   No syntax errors in merge fields or functions. (Compiled size: 183 characters)

7. Email ID (email)
8. Address (Text)
9. Type of items (Multi select picklist) (Values: Select items from dropdown using global picklist)
10. Product purchased (Multi select picklist) (Values: Select items from dropdown using global picklist)
11. Chai (Multi select picklist) (Values: Single Tea, Masala Tea, Lemon Tea, Ginger Tea, Green Tea, Sugar free Tea)
12. Payment mode (Picklist)
13. Associated employer (Lookup relationship)(Related to: Employer account)
14. Order quantity (Formula)

Enter Formula = Quantity (Number) =

```
IF(INCLUDES( Products_Purchased__c , "Platinum Tea Powder"), 1, 0 ) +
IF(INCLUDES( Products_Purchased__c , "Double Delight Tea Powder"), 1,
0 ) +
IF( INCLUDES( Products_Purchased__c , "Super Dust Tea Powder") , 1, 0)
+
```



IF(INCLUDES( Products\_Purchased\_\_c , "Osmania Biscuits (Value Pack)"), 1, 0 ) +  
 IF(INCLUDES( Products\_Purchased\_\_c , "Osmania Biscuits (Premium Pack)"), 1, 0 ) +  
 IF( INCLUDES( Products\_Purchased\_\_c , "Dry Fruit Biscuits") , 1, 0) +  
 IF(INCLUDES( Products\_Purchased\_\_c , "Fruit Biscuits"), 1, 0 ) +  
 IF(INCLUDES( Products\_Purchased\_\_c , "Salt Biscuits"), 1, 0 ) +  
 IF(INCLUDES( Products\_Purchased\_\_c , "Multigrain Biscuits"), 1, 0 ) +  
 IF(INCLUDES( Products\_Purchased\_\_c , "Ragi Biscuits"), 1, 0 ) +  
 IF( INCLUDES( Products\_Purchased\_\_c , "Double Choco chip Cookies") , 1, 0) +  
 IF(INCLUDES( Products\_Purchased\_\_c , "Butter Almond Cookies"), 1, 0 ) +  
 IF(INCLUDES( Products\_Purchased\_\_c , "Melting Moments Cookies"), 1, 0 ) +  
 IF( INCLUDES( Products\_Purchased\_\_c , "Honey Oats Cookies") , 1, 0) +  
 IF(INCLUDES( Products\_Purchased\_\_c , "Delight Box"), 1, 0 ) +  
 IF(INCLUDES( Products\_Purchased\_\_c , "Signature Box"), 1, 0 ) +  
 IF( INCLUDES( Products\_Purchased\_\_c , "Assorted Pack") , 1, 0) +  
 IF(INCLUDES( Chai\_\_c , "TheChaiShop&Co Special Tea"), 1, 0) +  
 IF(INCLUDES( Chai\_\_c , "Single Tea"), 1, 0) +  
 IF(INCLUDES( Chai\_\_c , "Masala Tea"), 1, 0) +  
 IF(INCLUDES( Chai\_\_c , "Lemon Tea"), 1, 0) +  
 IF(INCLUDES( Chai\_\_c , "Ginger Tea"), 1, 0) +  
 IF(INCLUDES( Chai\_\_c , "Green Tea"), 1, 0) +  
 IF(INCLUDES( Chai\_\_c , "Sugar Free Tea"), 1, 0)

#### 15. Total bill (Formula)

Formula: Enter Formula = Quantity (Number) =

IF(INCLUDES( Products\_Purchased\_\_c , "Platinum Tea Powder"), 175, 0 ) +  
 IF(INCLUDES( Products\_Purchased\_\_c , "Double Delight Tea Powder"), 150, 0 ) +  
 IF( INCLUDES( Products\_Purchased\_\_c , "Super Dust Tea Powder") , 125, 0) +  
 IF(INCLUDES( Products\_Purchased\_\_c , "Osmania Biscuits (Value Pack)"), 50, 0 ) +  
 IF(INCLUDES( Products\_Purchased\_\_c , "Osmania Biscuits (Premium Pack)"), 80, 0 ) +  
 IF( INCLUDES( Products\_Purchased\_\_c , "Dry Fruit Biscuits") , 110, 0) +  
 IF(INCLUDES( Products\_Purchased\_\_c , "Fruit Biscuits"), 160, 0 ) +

IF(INCLUDES( Products\_Purchased\_\_c , "Salt Biscuits"), 110, 0 ) +  
 IF(INCLUDES( Products\_Purchased\_\_c , "Multigrain Biscuits"), 170, 0 ) +  
 IF(INCLUDES( Products\_Purchased\_\_c , "Ragi Biscuits"), 190, 0 ) +  
 IF( INCLUDES( Products\_Purchased\_\_c , "Double Choco chip Cookies") ,  
 200, 0) +  
 IF(INCLUDES( Products\_Purchased \_\_c , "Butter Almond Cookies"), 110, 0  
 ) +  
 IF(INCLUDES( Products\_Purchased\_\_c , "Melting Moments Cookies"),  
 150, 0 ) +  
 IF( INCLUDES( Products\_Purchased\_\_c , "Honey Oats Cookies") , 160, 0)  
 +  
 IF(INCLUDES( Products\_Purchased\_\_c , "Delight Box"), 850, 0 ) +  
 IF(INCLUDES( Products\_Purchased\_\_c , "Signature Box"), 1500, 0 ) +  
 IF( INCLUDES( Products\_Purchased\_\_c , "Assorted Pack") , 600, 0) +  
 IF(INCLUDES( Chai\_\_c , "TheChaiShop&Co Special Tea"), 70, 0) +  
 IF(INCLUDES( Chai\_\_c , "Single Tea"), 50, 0) +  
 IF(INCLUDES( Chai\_\_c , "Masala Tea"), 60, 0) +  
 IF(INCLUDES( Chai\_\_c , "Lemon Tea"), 40, 0) +  
 IF(INCLUDES( Chai\_\_c , "Ginger Tea"), 55, 0) +  
 IF(INCLUDES( Chai\_\_c , "Green Tea"), 45, 0) +  
 IF(INCLUDES( Chai\_\_c , "Sugar Free Tea"), 55, 0)

**The fields for enterprise account object:**

1. Enterprise Name (Text)
2. Phone Number (Phone)
3. Email ID (email)
4. Address (Text)
5. Type of items (Multi select picklist)
6. Products Purchased (Multi select picklist)
7. Associated employer (Lookup relationship)(Related to: Employer account)
8. Order Quantity (Formula)
 

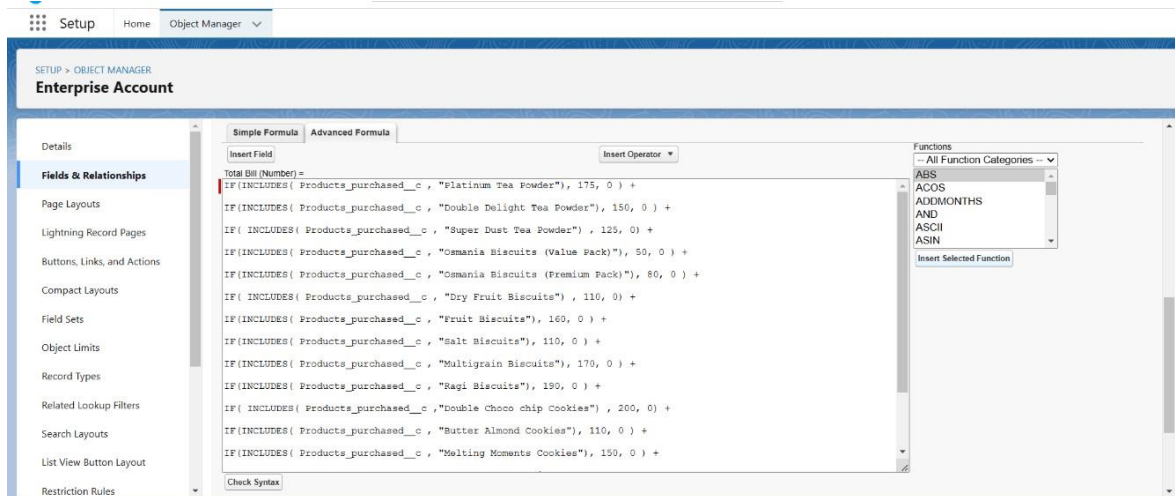
Enter Formula = Quantity (Number) =  
 IF(INCLUDES( Products\_Purchased\_\_c , "Platinum Tea Powder"),  
 1, 0 ) +  
 IF(INCLUDES( Products\_Purchased\_\_c , "Double Delight Tea  
 Powder"), 1, 0 ) +  
 IF( INCLUDES( Products\_Purchased\_\_c , "Super Dust Tea Powder")  
 , 1, 0) +  
 IF(INCLUDES( Products\_Purchased\_\_c , "Osmania Biscuits (Value  
 Pack)"), 1, 0 ) +

```

IF(INCLUDES( Products_Purchased__c , "Osmania Biscuits
(Premium Pack)"), 1, 0 ) +
IF( INCLUDES( Products_Purchased__c , "Dry Fruit Biscuits") , 1, 0)
+
IF(INCLUDES( Products_Purchased__c , "Fruit Biscuits"), 1, 0 ) +
IF(INCLUDES( Products_Purchased__c , "Salt Biscuits"), 1, 0 ) +
IF(INCLUDES( Products_Purchased__c , "Multigrain Biscuits"), 1, 0
) +
IF(INCLUDES( Products_Purchased__c , "Ragi Biscuits"), 1, 0 ) +
IF( INCLUDES( Products_Purchased__c , "Double Choco chip
Cookies") , 1, 0) +
IF(INCLUDES( Products_Purchased__c , "Butter Almond Cookies"),
1, 0 ) +
IF(INCLUDES( Products_Purchased__c , "Melting Moments
Cookies"), 1, 0 ) +
IF( INCLUDES( Products_Purchased__c , "Honey Oats Cookies") , 1,
0) +
IF(INCLUDES( Products_Purchased__c , "Delight Box"), 1, 0 ) +
IF(INCLUDES( Products_Purchased__c , "Signature Box"), 1, 0 ) +
IF( INCLUDES( Products_Purchased__c , "Assorted Pack") , 1, 0)

```

## 9. Total bill (Formula)



## 10. Payment mode (Picklist)

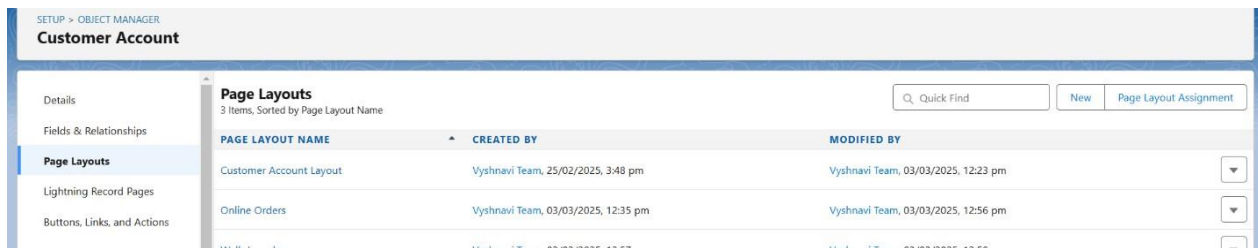
Click save.

## 7. Page Layouts:

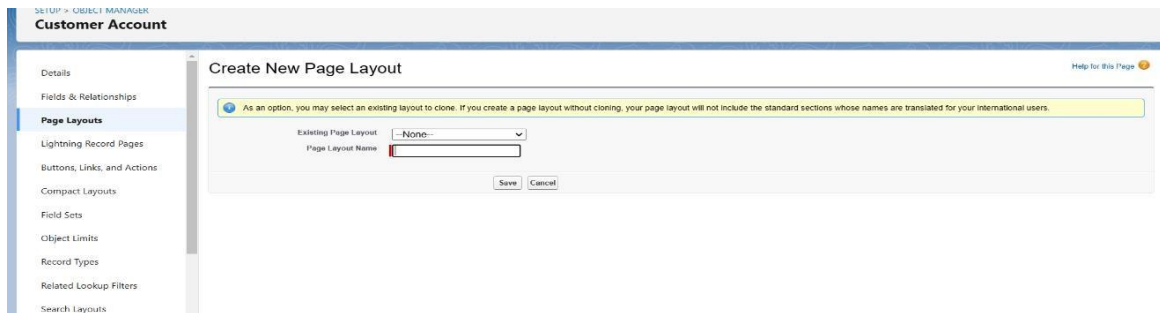
Two page layouts are created. They are-

- Online order page layouts
- Walk-in order page layouts

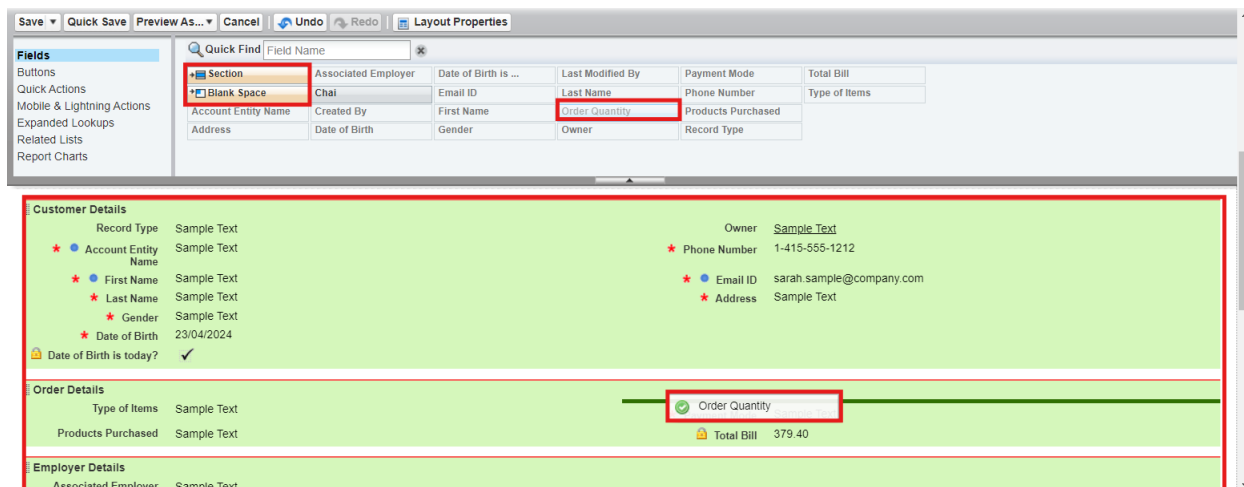
To create the page layouts, go to set up and select object manager tab. Then select Customer account object from the dropdown. Click on page layouts and click new.



Page layout name: Online orders. Click save.



Drag and arrange the fields as below.



Click save.

Now repeat the same process to create walk-in orders page layout.

## 8. Record types:

To create the record types, go to set up and select object manager tab.

Then select Customer account object from the dropdown.

Select record types. Click new.

Enter the details as shown.

Setup > OBJECT MANAGER  
**Customer Account**

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

Customer Account

Step 1. Enter the details Step 1 of 2

Enter a name and description for the new record type. The new record type will include all the picklist values from the existing record type selected below. After saving the new record type, you will be able to customize the picklist values.

**Record Type** Required Information

Existing Record Type: -Master-  
Record Type Label: Online Order  
Record Type Name: Online\_Order  
Description:   
Active: ☒

Select Make Available to give users assigned to this profile the ability to create and clone records of this record type, or assign this record type to existing records. To make the new record type the default for a profile, select Make Default. Users assigned to this record type can still view and edit records associated with record types not available for their profiles.

Select the page layout that users with this profile see for records with this record type. After saving, choose the picklist values that are available with this record type.

- ☒ Apply one layout to all profiles Online Orders ▼  
☐ Apply a different layout for each profile

Click save & new and repeat the process to create walk-in orders record type.

## 9. Validation rules:

To create the validation rules, go to employer account object through object manager tab.

Select validation rules and new.

Setup > OBJECT MANAGER  
**Employer Account**

Field Sets  
Object Limits  
Record Types  
Related Lookup Filters  
Search Layouts

**Validation Rules** 3 Items, Sorted by Rule Name New

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Aadhar_Number	Top of Page	Aadhar number is required. The Aadhar number must be 12 digits long Aadhar number can only contain numeric digits.	✓	Vyshnavi Team, 03/03/2025, 2:42 pm

Enter rule name and error correction formula as shown below:

**Validation Rule Edit**

Rule Name:

Active: ☒

Description:

**Error Condition Formula**

Example:  More Examples...

Display an error if Discount is more than 30%

If this formula expression is **true**, display the text defined in the Error Message area

Insert Field Insert Operator

AND( NOT (ISBLANK( Aadhar\_Number\_\_c )), LEN( Aadhar\_Number\_\_c ) <> 12, NOT (REGEX( Aadhar\_Number\_\_c , \"^[1-9]{12}\$\")) )

Check Syntax

Functions: All Function Categories -- ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN

Insert Selected Function

ABS(number)  
Returns the absolute value of a number, a number without its sign

Help on this function

Error message is as follows:

**Error Message**

Example:

This message will appear when Error Condition formula is **true**

Error Message:

This error message can either appear at the top of the page or below a specific field on the page

Error Location: ☒ Top of Page ☐ Field

Save Save & New Cancel

Repeat the same process to create two more validation rules for employer account object.

- **Enter Rule Name:** PAN Number

**Error Condition Formula:**

```
AND(
    NOT(ISBLANK( Phone_Number__c )),
    NOT(REGEX( Phone_Number__c , \"^[1-9]{10}$\")),
    NOT(REGEX( Phone_Number__c , \"^\\d+$\"))
)
```

**Error Message:** The PAN Details field must not be blank.

The PAN card number does not start with 0.

The PAN card number does not contain special characters.

- **Enter Rule Name:** Phone Number

**Error Condition Formula:**

```
AND(  
    NOT(ISBLANK( Phone_Number__c )),  
    NOT(REGEX( Phone_Number__c , "^[1-9]{10}$")),  
    NOT(REGEX( Phone_Number__c , "^\\d+$"))  
)
```

**Error Message :**

The phone number field must not be blank.

The phone number must consist of exactly 10 digits.

The phone number must contain only numeric digits  
(no spaces, dashes, parentheses, etc.)

Now repeat same process to create validation rules for customer account object as shown:

- **Enter Rule Name:** Phone Number

**Error Condition Formula:**

```
AND(  
    NOT(ISBLANK( Phone_Number__c )),  
    NOT(REGEX( Phone_Number__c , "^[1-9]{10}$")),  
    NOT(REGEX( Phone_Number__c , "^\\d+$"))  
)
```

**Error Message:**

The phone number field must not be blank.

The phone number must consist of exactly 10 digits.

The phone number must contain only numeric digits  
(no spaces, dashes, parentheses, etc.)

For enterprise account repeat the same.

- Enter Rule Name : Phone Number

Error Condition Formula :

```
AND(
  NOT(ISBLANK( Phone_Number__c )),
  NOT(REGEX( Phone_Number__c , "[1-9]{10}$")),
  NOT(REGEX( Phone_Number__c , "^\\d+$"))
)
```

Error Message :

The phone number field must not be blank.

The phone number must consist of exactly 10 digits.

The phone number must contain only numeric digits  
(no spaces, dashes, parentheses, etc.)

Click save.

## 10. Email Template creation:

Go to quick find and search classic email templates.

Click on new email template.

The screenshot displays the Salesforce Classic Email Templates interface. The top navigation bar includes the Salesforce logo, a search bar, and various utility icons. The left sidebar shows the 'Setup' menu with 'Email' selected, and 'Classic Email Templates' and 'Classic Letterheads' listed. The main content area is titled 'Classic Email Templates' and shows a list of 'Unfiled Public Classic Email Templates'. Below the list, there is a 'New Template' button. The 'New Template' wizard is open, showing 'Step 1. Email Template: New Template'. The wizard prompts the user to 'Choose the type of email template you would like to create.' with four radio button options: 'Text' (selected), 'HTML (using Classic Letterhead)', 'Custom (without using Classic Letterhead)', and 'Visualforce'. The 'Next' and 'Cancel' buttons are visible at the bottom right of the wizard.

Action	Email Template Name	Template Type	Available For Use	Description	Author	Last Modified Date
<a href="#">Edit</a>   <a href="#">Del</a>	Appointment for Unauthenticated User using Appointment Types - For Amazon Chime	Custom	✓	Email template for confirmation of an appointment when appointments are scheduled using appointment types with Amazon Chime.	sfdcadm	25/02/2025
<a href="#">Edit</a>   <a href="#">Del</a>	Appointment for Unauthenticated User using Appointment Types - For third party	Custom	✓	Email template for confirmation of an appointment when appointments are scheduled using appointment types with third party video applications.	sfdcadm	25/02/2025
<a href="#">Edit</a>   <a href="#">Del</a>	Appointment for Unauthenticated User using Engagement Channels-For Amazon Chime	Custom	✓	Email template for confirmation of an appointment when appointments are scheduled using engagement channels with Amazon Chime.	sfdcadm	25/02/2025
<a href="#">Edit</a>   <a href="#">Del</a>	Appointment for Unauthenticated User using Engagement Channels-For third party	Custom	✓	Email template for confirmation of an appointment when appointments are scheduled using engagement channels with third party video applications.	sfdcadm	25/02/2025



Fill the details as follows:

The screenshot shows the 'Classic Email Templates' setup page. The left sidebar has a search bar with 'classic' and a menu with 'Email', 'Classic Email Templates', and 'Classic Letterheads'. The main content area is titled 'Classic Email Templates' and contains an 'Email Template Edit' form. The form has a 'Folder' dropdown set to 'Unified Public Classic Email Templates', an 'Available For Use' checkbox checked, an 'Email Template Name' field with 'Birthday Offer Email', a 'Template Unique Name' field with 'Birthday\_Offer\_Email', an 'Encoding' dropdown set to 'Unicode (UTF-8)', a 'Description' field, a 'Subject' field with 'Special Birthday Offer Inside!', and an 'Email Body' field with a birthday message. The form has 'Save', 'Save & New', and 'Cancel' buttons at the top and bottom.

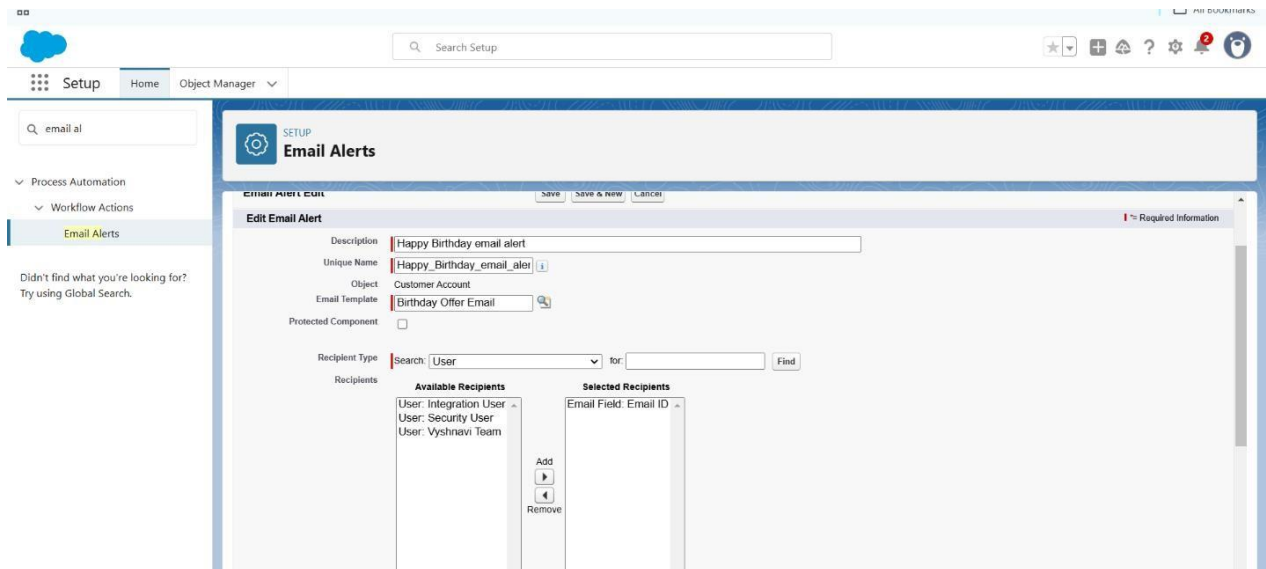
Click save.

For email alert creation, search for email alerts in quick find.

Click on new email alert.

The screenshot shows the 'Email Alerts' setup page. The left sidebar has a search bar with 'email al' and a menu with 'Process Automation', 'Workflow Actions', and 'Email Alerts'. The main content area is titled 'Email Alerts' and contains an 'All Email Alerts' section. The section has a 'View' dropdown set to 'All Email Alerts' and a 'Create New View' link. Below the view controls is a table with columns: 'Action', 'Description', 'Email Template Name', 'Object', and 'Last Modified Date'. The table is currently empty. There is a 'New Email Alert' button at the top right of the table.

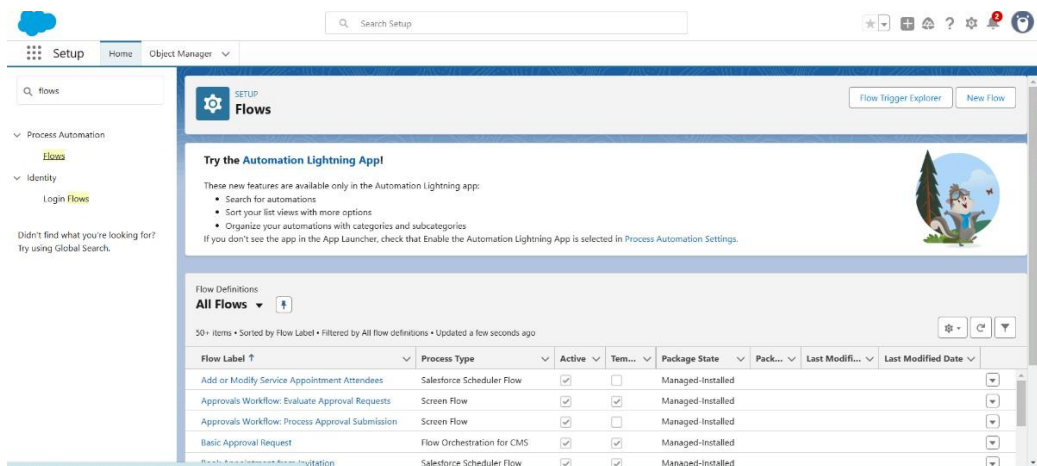
The details should be filled as shown:



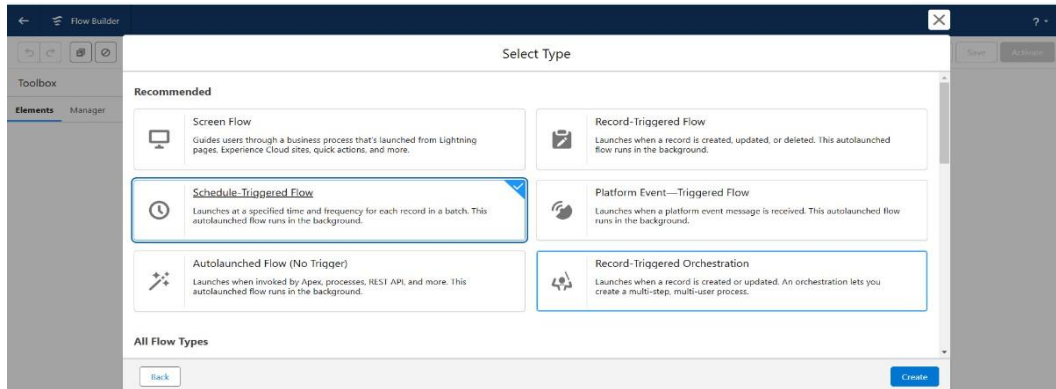
Make sure that the Default workflow user is assigned. Click save.

## 11. Flows creation:

Go to quick find and search flows. Select new flow.



Select schedule-triggered flow and click create.



## Set a Schedule

Start Date: Enter the Date, when you want to start the flow.

Start Time: Enter the Time, when you want to start the flow.

Frequency: Daily

## Create Object

Object: Customer Account

Condition Requirements: All conditions Are Met (AND)

Field: Date\_of\_Birthday\_is\_today\_\_c

Operator: Equals

Value: \$GlobalConstant.True

Field: Email\_ID\_c

Operator: IS NULL

Value: \$GlobalConstant.False

Click + icon and add action component.

In New Action Page

Filter By: Type and select Email Alert

In Action: Search and select Happy Birthday email alert

Label: Send Happy Birthday Email

API Name: Auto Populates

Set Input Values for the Selected Action: Record ID: {!\$Record.Id}

Happy Birthday email alert

\* Label

Send Happy Birthday Email

\* API Name ⓘ

Send\_Happy\_Birthday\_Email

Description

Use values from earlier in the flow to set the inputs for the "Happy Birthday email alert" email alert. To use its outputs later in the flow, store them in variables.

Set Input Values for the Selected Action

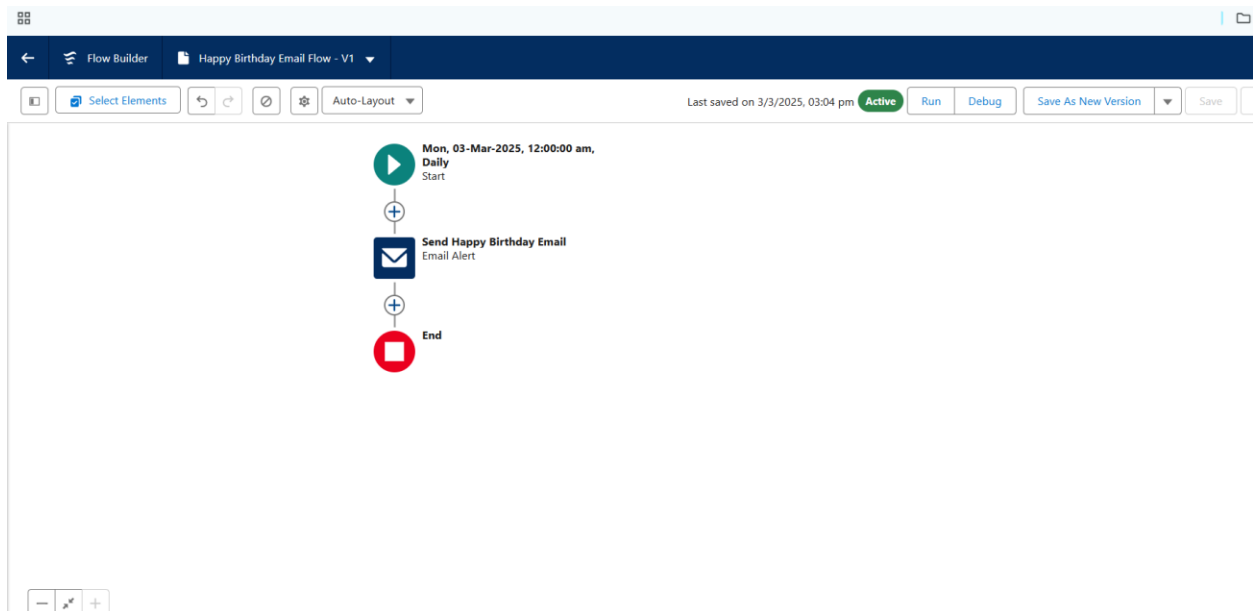
A<sub>a</sub>

\* Record ID ⓘ

A<sub>a</sub> Triggering Customer\_Account\_c > Record ID

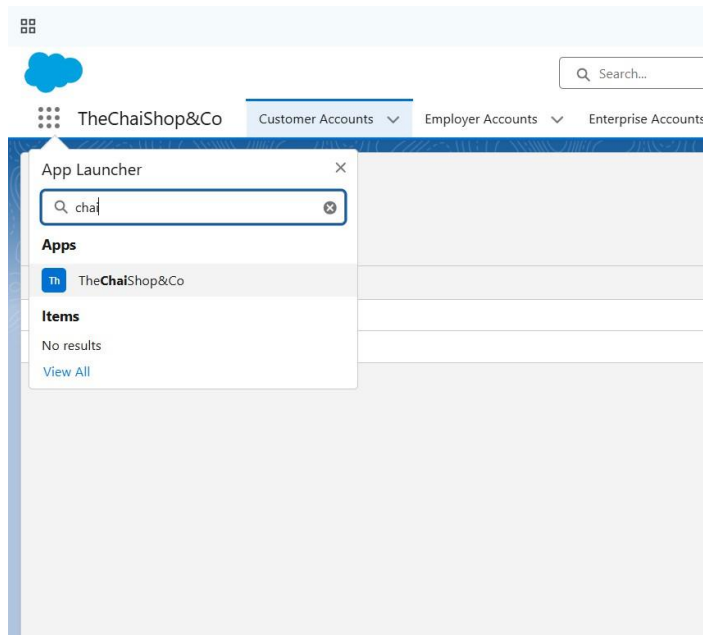
> Show advanced options

Now click done and save the flow as follows:  
Happy Birthday Email Flow  
Activate the flow.



## 12. Reports & Dashboards:

Click App Launcher  and select TheChaiShop&Co.

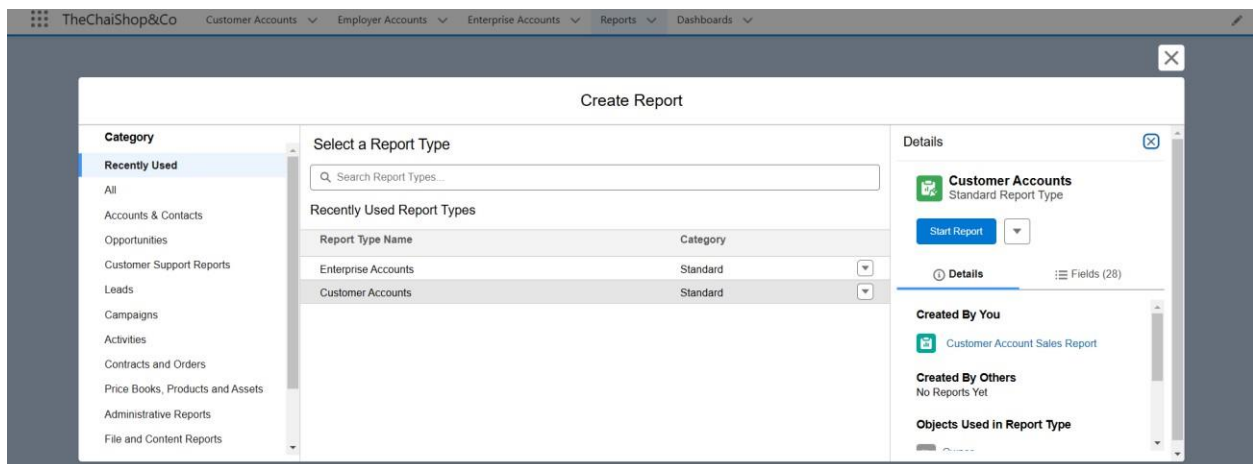


Click Reports

Click New Report

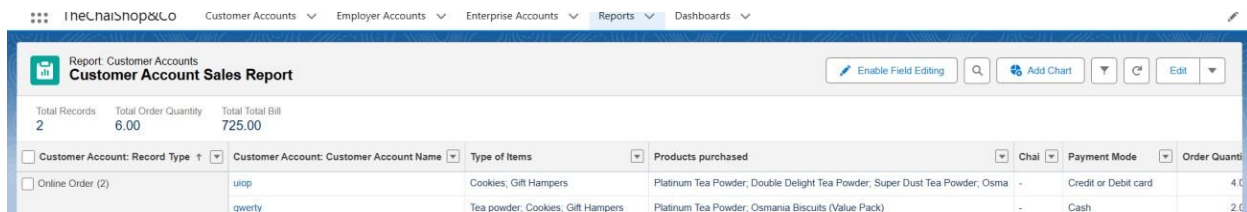
In search type Customer Accounts and Select Customer Accounts.

Click Start Report.



Group Rows: Search and Select  
Customer Account: Record Type

Click Add Chart on the top.



Customer Account: Record Type	Customer Account: Customer Account Name	Type of Items	Products purchased	Chai	Payment Mode	Order Quantity
Online Order (2)	uioip	Cookies, Gift Hampers	Platinum Tea Powder, Double Delight Tea Powder, Super Dust Tea Powder, Osma	-	Credit or Debit card	4.0
	qwerty	Tea powder, Cookies, Gift Hampers	Platinum Tea Powder, Osmania Biscuits (Value Pack)	-	Cash	2.0

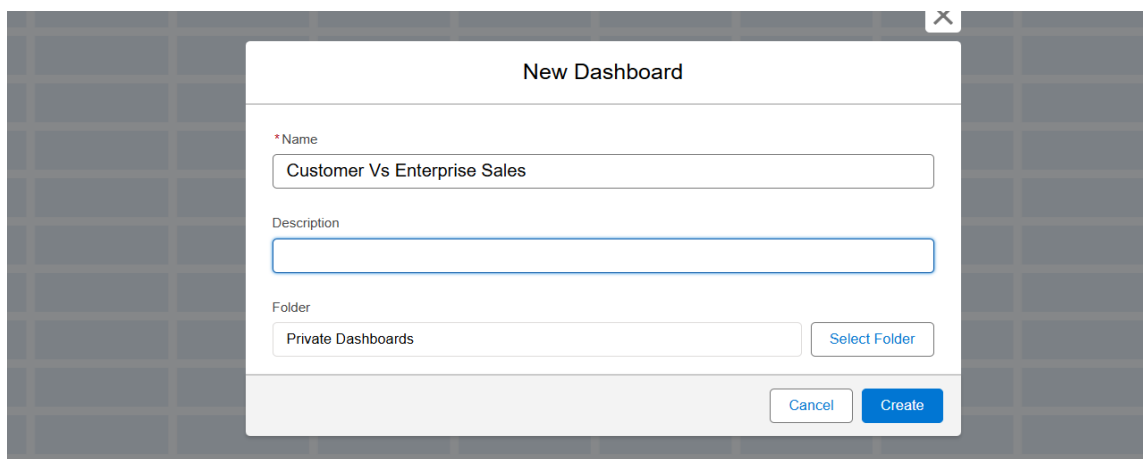
Click save with name Customer accounts sales report.

Repeat the same steps to create another report named Enterprise account sales report.

## Dashboards

Now go to dashboards and click new.

Create a dashboard named Customer vs Enterprise sales



### New Dashboard

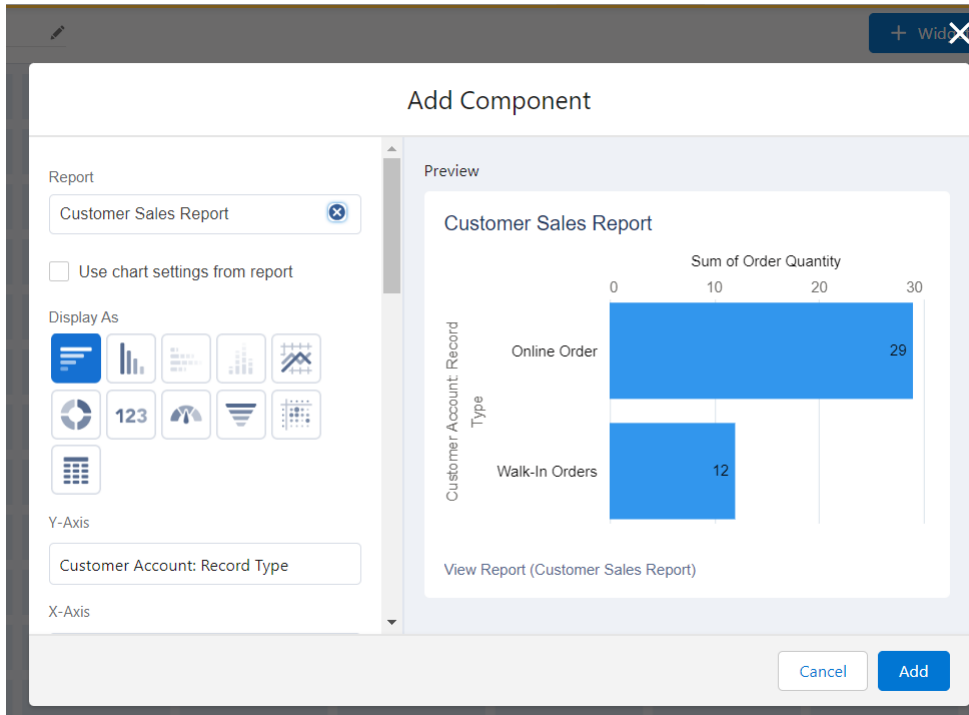
\* Name  
Customer Vs Enterprise Sales

Description

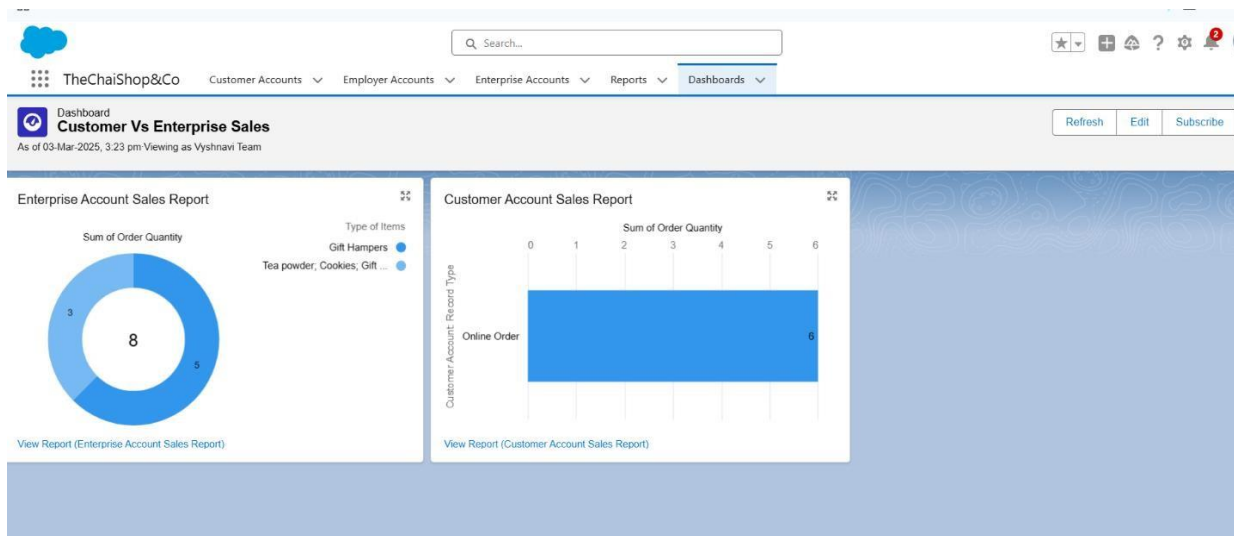
Folder  
Private Dashboards [Select Folder](#)

[Cancel](#) [Create](#)

Click widget and chart/table. Select customer account sales report and click add.



Repeat the same for enterprise account sales report. Save.



## Conclusion

The **CRM application for The Chai Shop & Co.** is a valuable tool that helps manage customer relationships, improve sales, and streamline daily operations. By using **Salesforce features like custom objects and tabs**, we have built a system that is easy to use, efficient, and tailored to the company's needs.

This CRM makes it easier to track customer interactions, automate tasks, and make better business decisions. It also sets a strong foundation for future improvements, such as adding AI insights or marketing automation. With this system in place, **The Chai Shop & Co.** can provide better service, build stronger customer relationships, and grow its business effectively.