

Kallam Haranadhareddy Institute Of Technology

A CRM application for THECHAISHOP&CO

By

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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

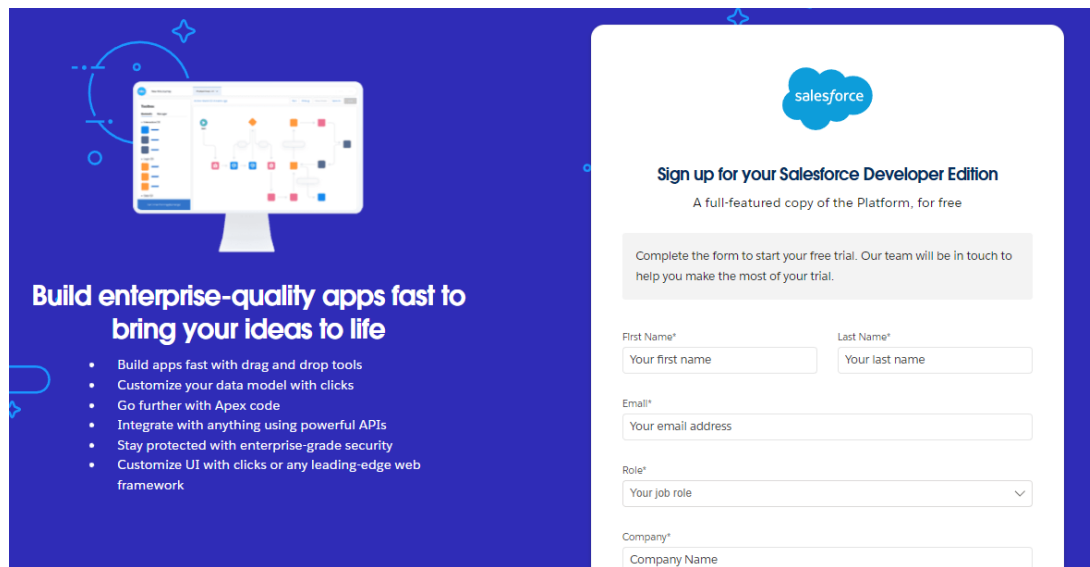
To build a robust CRM Application for THECHAISHOP&CO, the following Salesforce features and concepts were implemented:

- **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, a blue banner features a monitor displaying a flow diagram and the text "Build enterprise-quality apps fast to bring your ideas to life". Below this, a bulleted list highlights key features: building apps with drag-and-drop tools, customizing data models with clicks, using Apex code, integrating with APIs, enterprise-grade security, and customizing the UI. On the right, a white form titled "Sign up for your Salesforce Developer Edition" includes a sub-header "A full-featured copy of the Platform, for free". A grey box instructs users to complete the form for a free trial. The form fields include First Name, Last Name, Email, Role (a dropdown menu), and Company (with a sub-field for 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

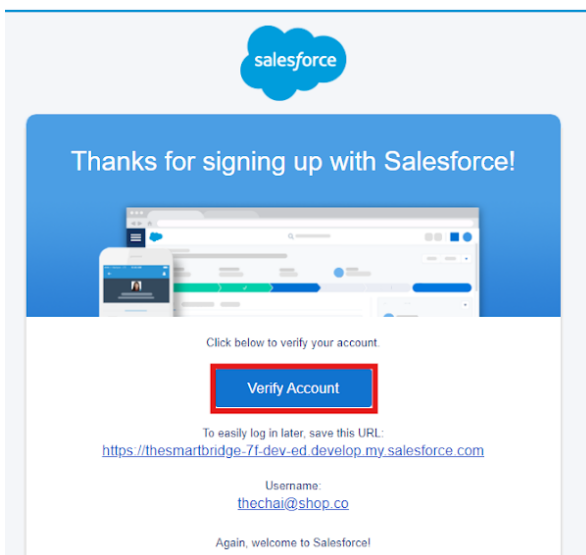
Last Name*
Your last name

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 an email from Salesforce with the subject "Thanks for signing up with Salesforce!". It includes a "Verify Account" button highlighted with a red box. Below the button, it provides a URL to save for future login: <https://thesmartbridge-71-dev-ed.develop.my.salesforce.com>. The email also lists the username as thechai@shop.co and ends with a welcome message.

Thanks for signing up with Salesforce!

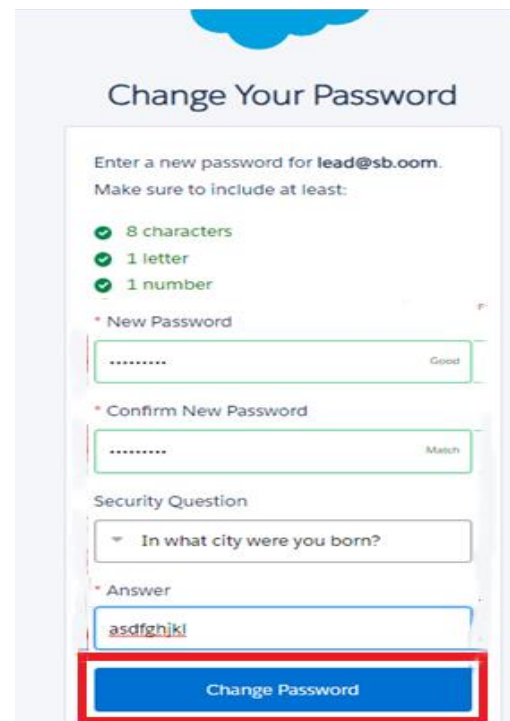
Click below to verify your account.

Verify Account

To easily log in later, save this URL:
<https://thesmartbridge-71-dev-ed.develop.my.salesforce.com>

Username:
thechai@shop.co

Again, welcome to Salesforce!



The image shows the "Change Your Password" page in Salesforce. It prompts the user to enter a new password for the email lead@sb.oom. It lists password requirements: 8 characters, 1 letter, and 1 number. There are input fields for "New Password" (marked "Good") and "Confirm New Password" (marked "Match"). Below these is a "Security Question" dropdown set to "In what city were you born?" and an "Answer" field containing "asdfghjkl". A "Change Password" button is highlighted with a red box at the bottom.

Change Your Password

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

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

* New Password
Good

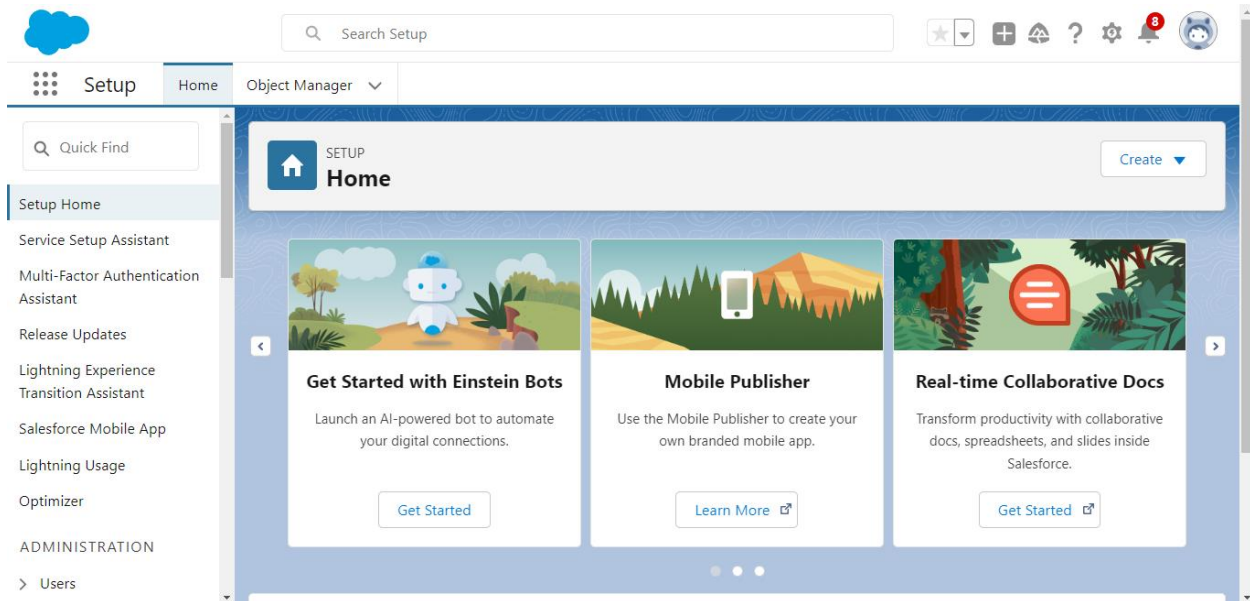
* Confirm New Password
Match

Security Question
In what city were you born?

* Answer
asdfghjkl

Change Password

- Then you will redirect to your salesforce setup page.



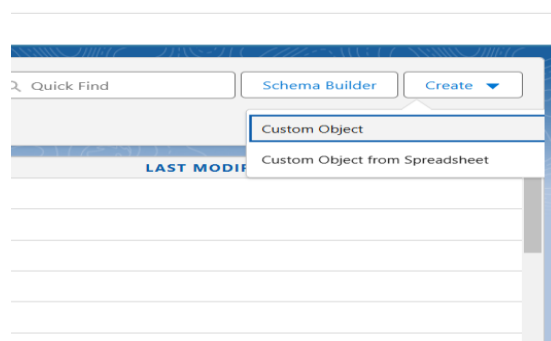
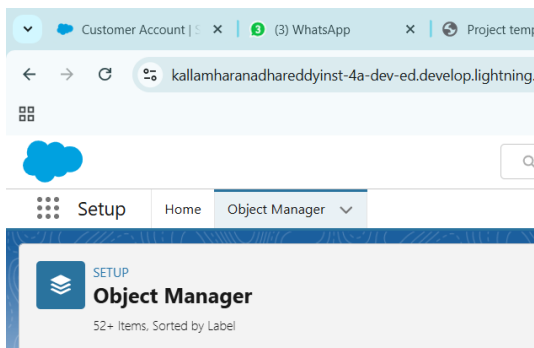
2. Custom object creation:

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 displays two screenshots of the Salesforce Setup interface. The top screenshot shows the 'Employer Account' configuration page under 'Object Manager'. The left sidebar lists various configuration options, with 'Details' selected. The main content area shows the 'Details' section for the 'Employer Account' object, including fields for API Name, Custom, Singular Label, Plural Label, and Object Limits. The right sidebar shows optional features like 'Enable Reports', 'Track Activities', 'Track Field History', 'Deployment Status', and 'Help Settings'. The bottom screenshot shows the 'New Custom Object' page under 'Custom Object Definition Edit'. The left sidebar lists various configuration options, with 'Custom Object Information' selected. The main content area shows the 'Custom Object Information' section, including fields for Label, Plural Label, Object Name, and Description. The right sidebar shows optional features like 'Enable Reports', 'Track Activities', 'Track Field History', 'Deployment Status', and 'Help Settings'.

Employer Account Configuration Details:

Field	Value
Description	
API Name	Employer_Account__c
Custom	<input checked="" type="checkbox"/>
Singular Label	Employer Account
Plural Label	Employer Accounts
Object Limits	
Enable Reports	<input checked="" type="checkbox"/>
Track Activities	<input checked="" type="checkbox"/>
Track Field History	<input checked="" type="checkbox"/>
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

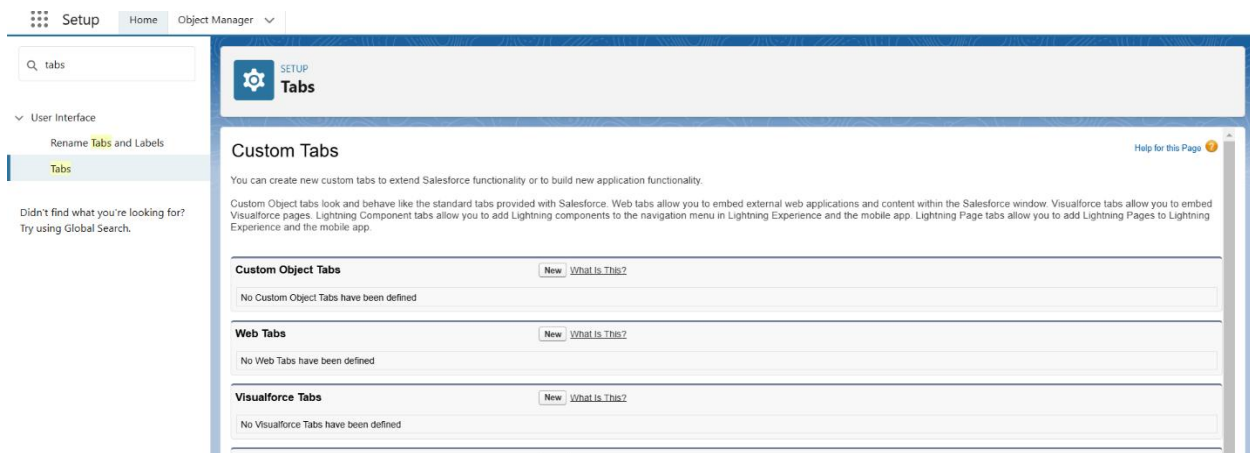
New Custom Object Configuration Details:

Field	Value
Label	Account
Plural Label	Accounts
Starts with vowel sound	<input type="checkbox"/>
Object Name	Account
Description	
Context Sensitive Help Setting	<input checked="" type="radio"/> Open the standard Salesforce.com Help & Training window
Content Name	None

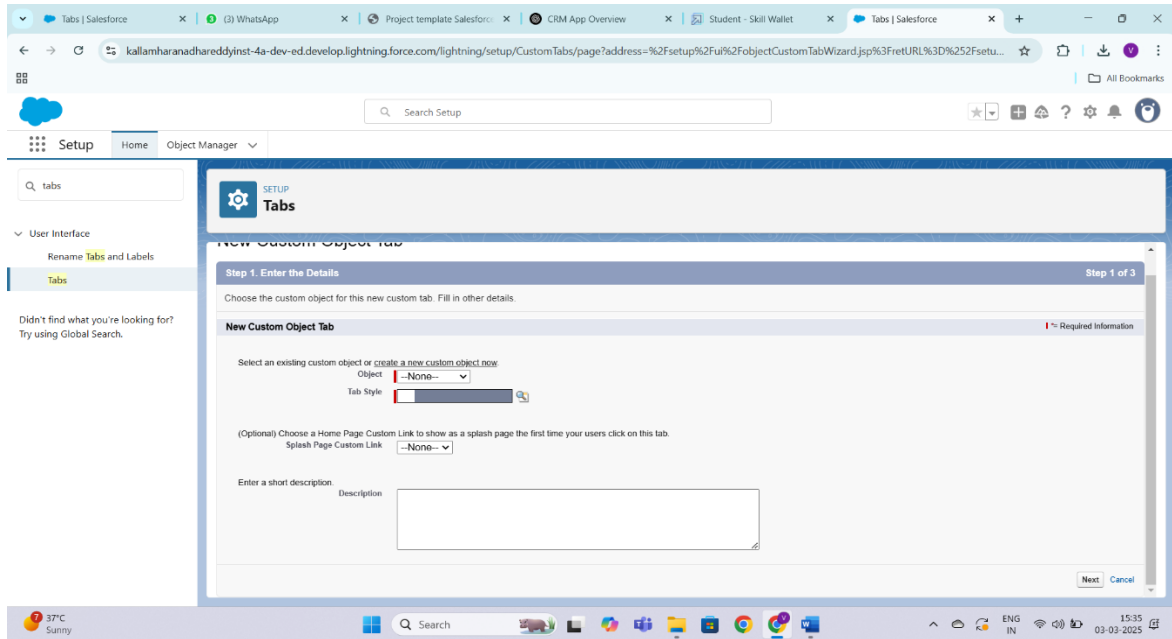
Now repeat the same steps to create customer account object and enterprise account object.

3. Custom tabs creation:

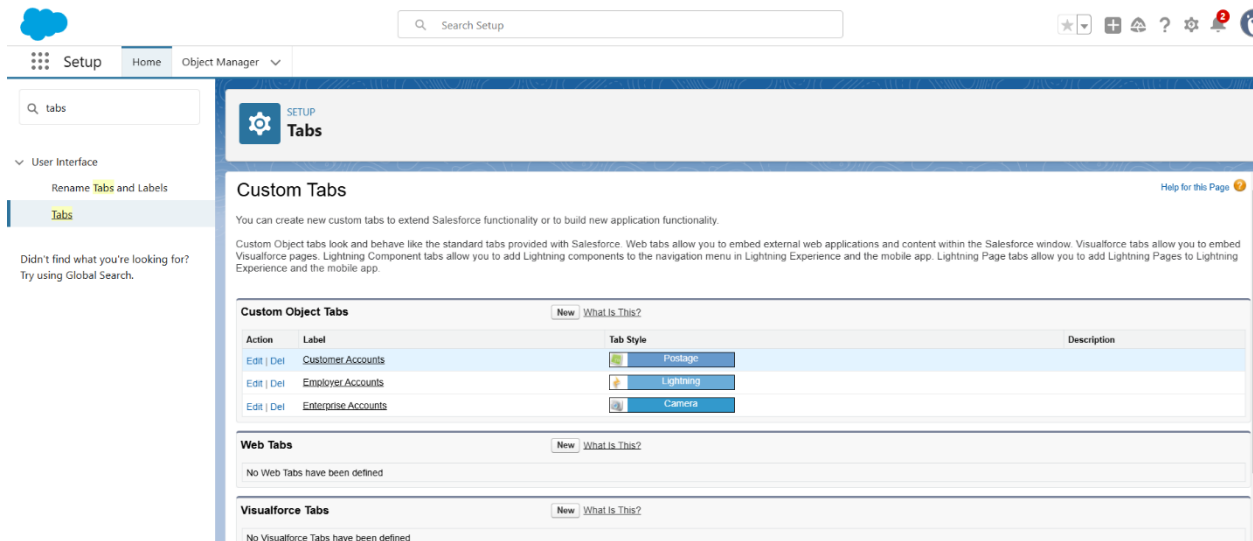
- Go to setup page > Type Tabs in Quick Find bar > click on tabs > New (under custom object tab)



- 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.

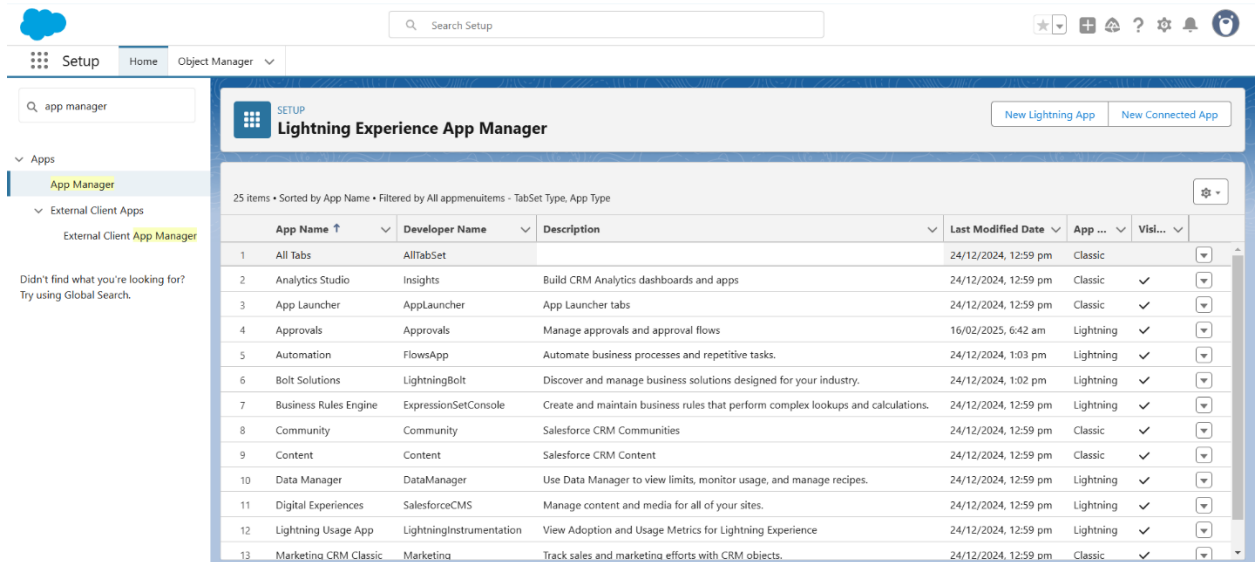


- Click save.
- Now repeat the same steps for customer account and enterprise account.

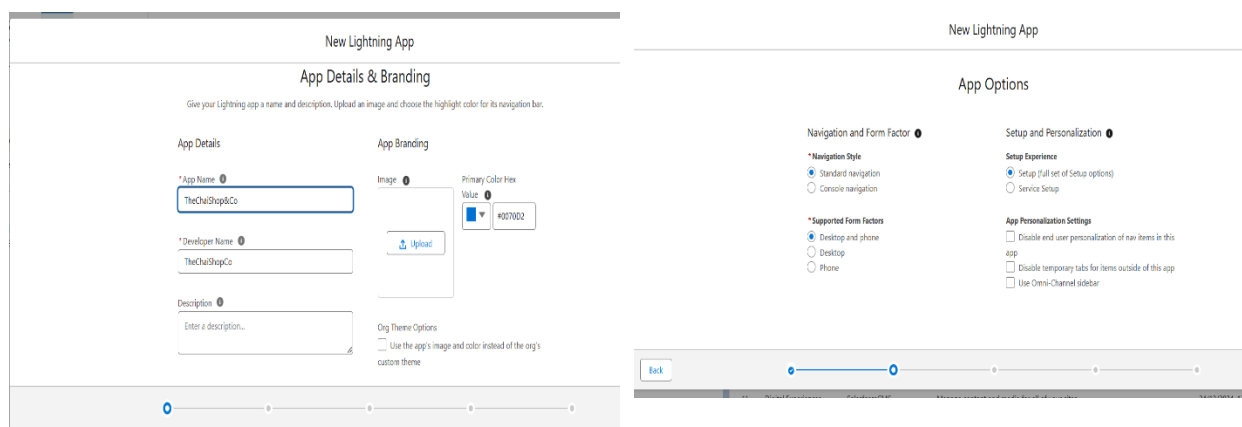


4. Create a Lightning app:

- 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



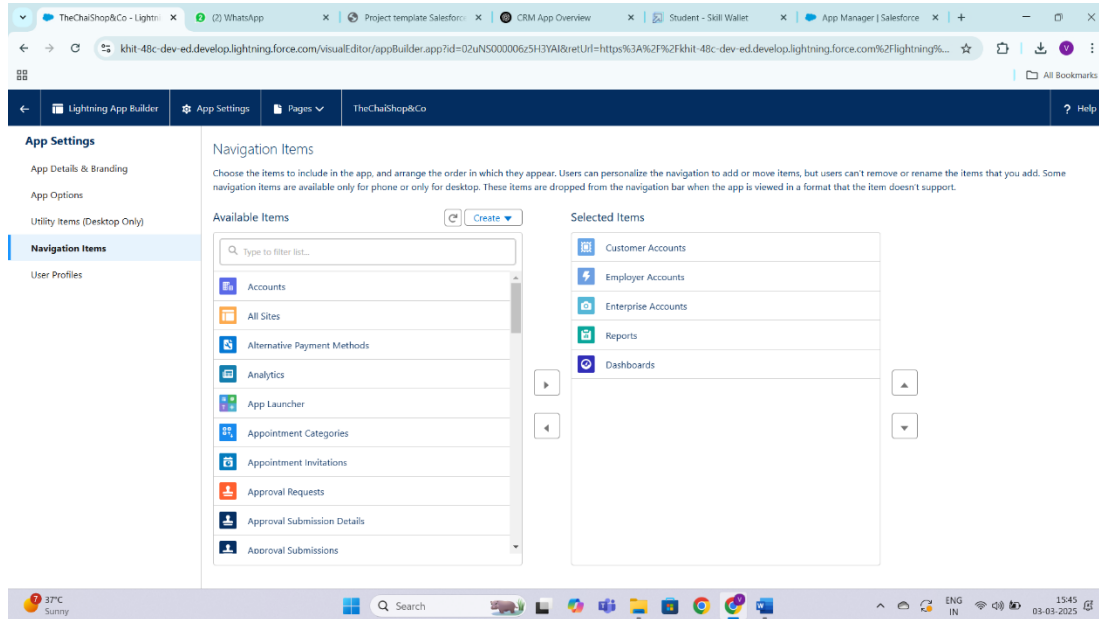
- Navigation items
 Select the created Custom Objects and required standard objects
 Customer Accounts

Employer Accounts

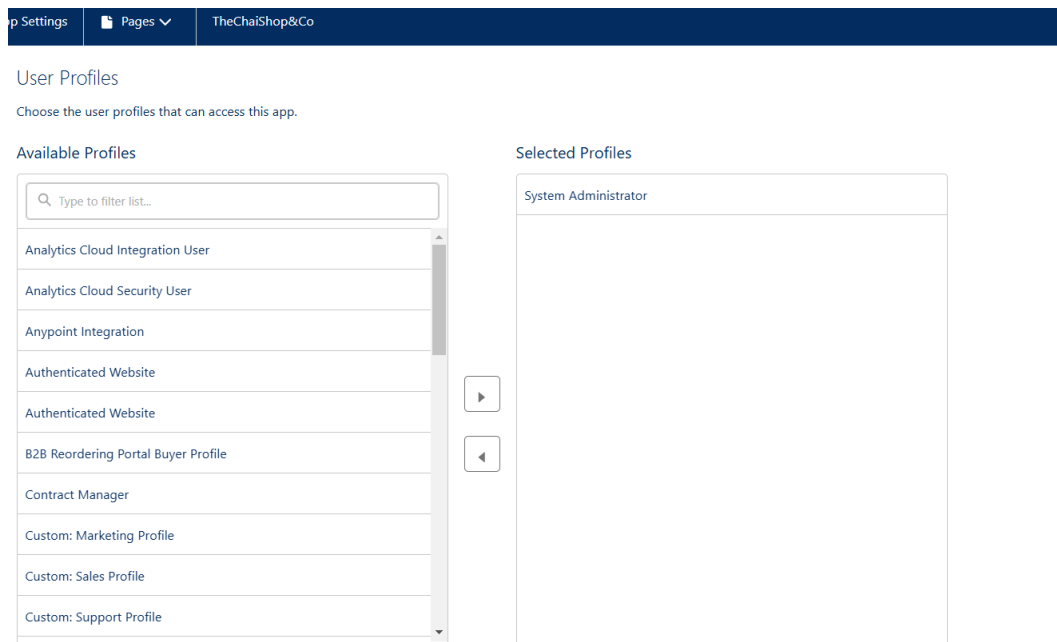
Enterprise Accounts

Reports

Dashboards

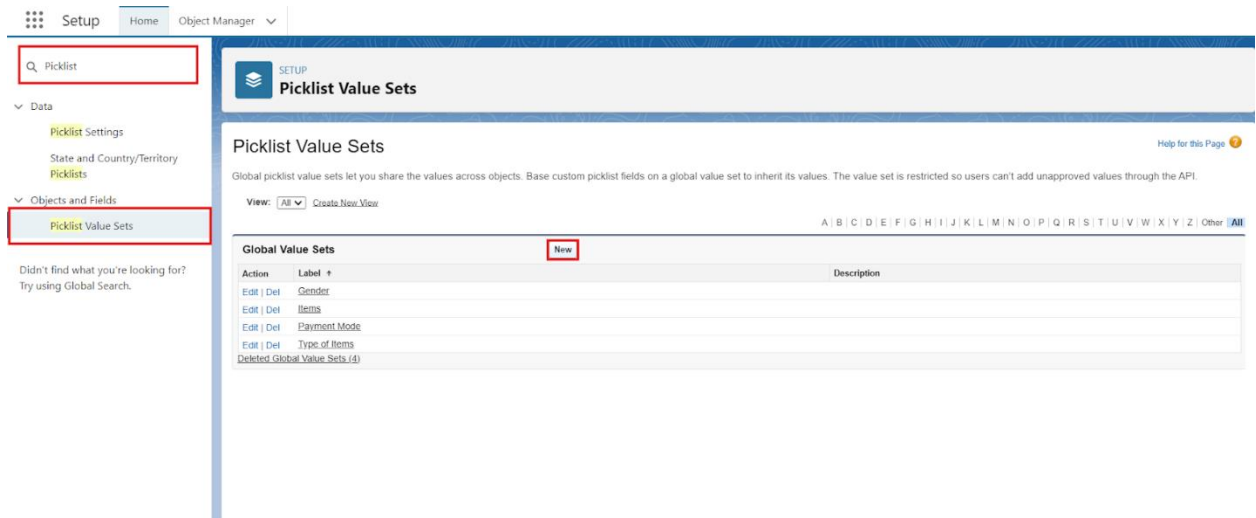


- To Add User Profiles: System Administrator
- Click Save & Finish.

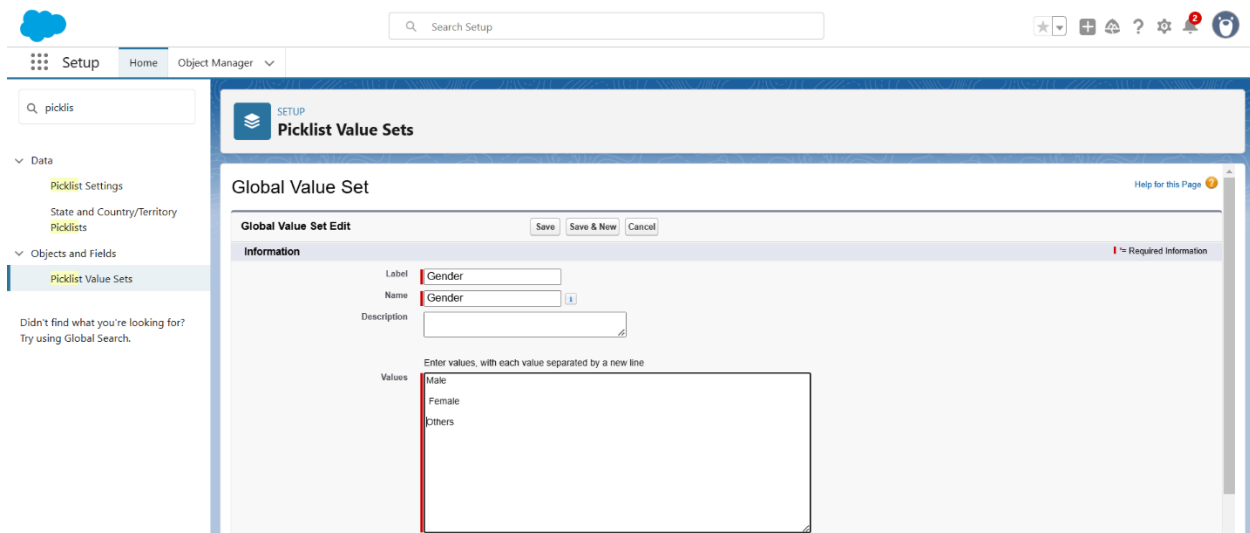


5. Global picklist creation:

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



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



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' entered. Below it, the navigation menu is expanded to 'Objects and Fields', and 'Picklist Value Sets' is selected. The main content area is titled 'Picklist Value Sets' and includes a description: 'Global picklist value sets let you share the values across objects. Base custom picklist fields on a global value set to inherit its values. The value set is restricted so users can't add unapproved values through the API.' Below the description, there's a 'View' dropdown set to 'All' and a 'Create New View' link. A table titled 'Global Value Sets' is displayed with columns 'Action', 'Label', and 'Description'. The table lists several value sets: 'Gender', 'Items', 'Payment Mode', and 'Type of Items'. Each row has 'Edit' and 'Del' links. At the bottom of the table, it says 'Deleted Global Value Sets (0)'. A 'New' button is located at the top right of the table.

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' entered. Below it, the navigation menu is expanded to 'Fields & Relationships'. The main content area is titled 'Fields & Relationships' and includes a description: '20 Items, Sorted by Field Label'. Below the description, there's a 'Quick Find' search bar and a 'New' button. A table titled 'Fields & Relationships' is displayed with columns 'FIELD LABEL', 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED'. The table lists several fields: 'Address', 'Associated Employer', 'Chai', 'Created By', 'Customer Account Name', 'Date of Birth', 'Date of Birthday is today?', and 'Email ID'. Each row has 'Edit' and 'Del' links. At the bottom of the table, it says 'Deleted Fields (0)'. A 'New' button is located at the top right of the table.

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

The screenshot shows the Salesforce Setup interface for the 'Customer Account' object in the 'Object Manager'. The 'Fields & Relationships' section is active, showing the configuration for the 'First Name' field. The field label is 'First Name', the length is set to 25, and the field name is 'First_Name'. The 'Required' checkbox is checked, and the 'Auto add to custom report type' checkbox is also checked. The 'Default Value' is set to 'Show Formula Editor'. The interface includes a sidebar with navigation options like 'Details', 'Fields & Relationships', 'Page Layouts', etc., and a top navigation bar with 'Setup', 'Home', and 'Object Manager'.

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 line.
- 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) +

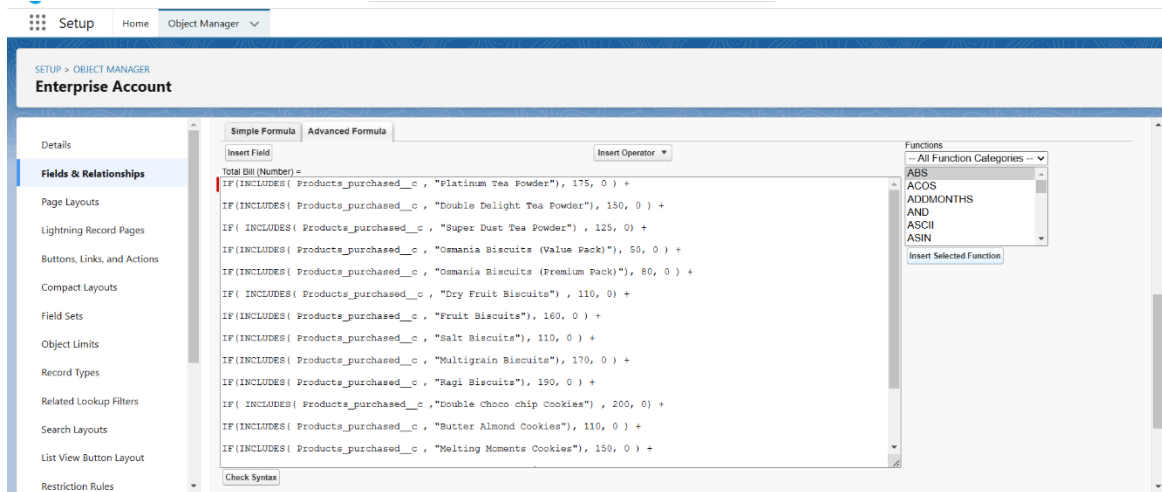
IF(INCLUDES(Products_Purchased__c , "Osmania Biscuits (Value
 Pack)", 1, 0) +

```

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.

Customer Account													
<ul style="list-style-type: none"> Details Fields & Relationships Page Layouts Lightning Record Pages Buttons, Links, and Actions 	Page Layouts 3 Items, Sorted by Page Layout Name												
	<input type="text"/> Quick Find <input type="button" value="New"/> Page Layout Assignment												
	<table border="1"> <thead> <tr> <th>PAGE LAYOUT NAME</th><th>CREATED BY</th><th>MODIFIED BY</th></tr> </thead> <tbody> <tr> <td>Customer Account Layout</td><td>Vyshnavi Team, 25/02/2025, 3:48 pm</td><td>Vyshnavi Team, 03/03/2025, 12:23 pm</td></tr> <tr> <td>Online Orders</td><td>Vyshnavi Team, 03/03/2025, 12:35 pm</td><td>Vyshnavi Team, 03/03/2025, 12:56 pm</td></tr> <tr> <td>Walk-In orders</td><td>Vyshnavi Team, 03/03/2025, 12:57 pm</td><td>Vyshnavi Team, 03/03/2025, 12:58 pm</td></tr> </tbody> </table>	PAGE LAYOUT NAME	CREATED BY	MODIFIED BY	Customer Account Layout	Vyshnavi Team, 25/02/2025, 3:48 pm	Vyshnavi Team, 03/03/2025, 12:23 pm	Online Orders	Vyshnavi Team, 03/03/2025, 12:35 pm	Vyshnavi Team, 03/03/2025, 12:56 pm	Walk-In orders	Vyshnavi Team, 03/03/2025, 12:57 pm	Vyshnavi Team, 03/03/2025, 12:58 pm
PAGE LAYOUT NAME	CREATED BY	MODIFIED BY											
Customer Account Layout	Vyshnavi Team, 25/02/2025, 3:48 pm	Vyshnavi Team, 03/03/2025, 12:23 pm											
Online Orders	Vyshnavi Team, 03/03/2025, 12:35 pm	Vyshnavi Team, 03/03/2025, 12:56 pm											
Walk-In orders	Vyshnavi Team, 03/03/2025, 12:57 pm	Vyshnavi Team, 03/03/2025, 12:58 pm											

Page layout name: Online orders. Click save.

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

Create New Page Layout

 As an option, you may select an existing layout to clone. If you create a page layout without cloning, your page layout will not include the standard sections whose names are translated for your international users.

Existing Page Layout:
Page Layout Name

[-None--]

Save

Cancel

Drag and arrange the fields as below.

Save
Quick Save
Preview As...
Cancel
Undo
Redo
Layout Properties

Fields

Buttons
Quick Actions
Mobile & Lightning Actions
Expanded Lookups
Related Lists
Report Charts

Quick Find

Field Name

Section
Blank Space

Associated Employer
Chai

Date of Birth is ...
Email ID

Last Modified By
Last Name

Payment Mode
Phone Number

Total Bill
Type of Items

Account Entity Name
Created By

First Name
Order Quantity

Products Purchased
Record Type

Address
Date of Birth

Gender
Owner

Customer Details

Record Type

Sample Text

Account Entity Name

Sample Text

First Name

Sample Text

Last Name

Sample Text

Gender

Sample Text

Date of Birth

23/04/2024

Date of Birth is today?

✓

Owner

Sample Text

Phone Number

1-415-555-1212

Email ID

sarah.sample@company.com

Address

Sample Text

Order Details

Type of Items

Sample Text

Products Purchased

Sample Text

Total Bill

379.40

Order Quantity

Order Quantity

Employer Details

Associated Employer

Sample Text

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.

The screenshot shows the Salesforce Setup page for the 'Customer Account' object. The 'Record Types' tab is selected in the left sidebar. The main content area is titled 'Customer Account' and shows 'Step 1. Enter the details'. The form includes fields for 'Existing Record Type' (set to '--Master--'), 'Record Type Label' (set to 'Online Order'), 'Record Type Name' (set to 'Online_Order'), and a 'Description' field. The 'Active' checkbox is checked. A red error message 'Required Information' is visible next to the 'Record Type Name' field. Below the form, there is a note about making the record type available to users.

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 ☐ Apply a different layout for each profile
- Online Orders

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.

The screenshot shows the Salesforce Setup page for the 'Employer Account' object. The 'Validation Rules' tab is selected in the left sidebar. The main content area is titled 'Employer Account' and shows 'Validation Rules'. There is a 'New' button in the top right corner. Below the header, there is a table with 5 columns: 'RULE NAME', 'ERROR LOCATION', 'ERROR MESSAGE', 'ACTIVE', and 'MODIFIED BY'. The table contains one row with the following data:

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:

The screenshot shows the Salesforce Setup page for the 'Employer Account' object. The 'Validation Rule Edit' window is open, showing the following details:

- Rule Name:** Aadhar_Number
- Active:** ☒
- Description:** (Empty text area)
- Error Condition Formula:**

Example: `Discount_Percent__c > 0.30` 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:

The screenshot shows the 'Error Message' configuration window for the validation rule. The 'Error Message' text area contains the following text:

Aadhar number is required.
The Aadhar number must be 12 digits long
Aadhar number can only contain numeric digits.

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 Setup menu, Home, and Object Manager. A search bar is present in the top right. The left sidebar shows the 'Email' section with 'Classic Email Templates' selected. The main content area is titled 'Classic Email Templates' and shows a list of 'Unfiled Public Classic Email Templates'. The list includes columns for Action, Email Template Name, Template Type, Available For Use, Description, Author, and Last Modified Date. Below the list, there is a 'New Template' button. The bottom section shows the 'New Template' wizard, specifically 'Step 1: Email Template: New Template', where the user can choose the type of email template to create: Text (selected), HTML (using Classic Letterhead), Custom (without using Classic Letterhead), or Visualforce.

Unfiled Public Classic Email Templates

Classic Email Template Availability [Expand]

Folder: Unfiled Public Classic Email Templates Create New Folder

Action	Email Template Name	Template Type	Available For Use	Description	Author	Last Modified Date
Edit Del	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.	sfdcadmin	25/02/2025
Edit Del	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.	sfdcadmin	25/02/2025
Edit Del	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.	sfdcadmin	25/02/2025
Edit Del	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.	sfdcadmin	25/02/2025

New Template

Step 1: Email Template: New Template

Choose the type of email template you would like to create.

☒ Text

☐ HTML (using Classic Letterhead)

☐ Custom (without using Classic Letterhead)

☐ Visualforce

[Next](#) [Cancel](#)

Fill the details as follows:

The screenshot shows the 'Classic Email Templates' setup page in Salesforce. The left sidebar has a search bar with 'classic' entered and a list of categories: 'Email' (expanded), 'Classic Email Templates', and 'Classic Letterheads'. The main content area is titled 'Classic Email Templates' and contains a form for editing a template. The form has a header 'Email Template Edit' with 'Save', 'Save & New', and 'Cancel' buttons. Below is the 'Email Template Information' section with a red 'Required Information' indicator. The fields are: Folder (Unfiled Public Classic Email Templates), Available For Use (checked), Email Template Name (Birthday Offer Email), Template Unique Name (Birthday_Offer_Email), Encoding (Unicode (UTF-8)), Description (empty), Subject (Special Birthday Offer Inside!), and Email Body (Dear {Customer_Account__c.First_Name__c}, Happy Birthday from all of us at TheChaiShop&Co! ???????? We hope your special day is filled with joy, laughter, and wonderful memories. To celebrate your birthday, we have a special gift just for you! As a token of our appreciation for your continued support, we're delighted to offer you an exclusive birthday discount. ????? Birthday Offer: Enjoy a fantastic 50% off on your next purchase as our birthday gift to you!). The form also has 'Save', 'Save & New', and 'Cancel' buttons at the 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 in Salesforce. The left sidebar has a search bar with 'email al' entered and a list of categories: 'Process Automation' (expanded), 'Workflow Actions', and 'Email Alerts'. The main content area is titled 'Email Alerts' and contains a table of all email alerts. The table has columns: Action, Description, Email Template Name, Object, and Last Modified Date. The table is currently empty. There is a 'New Email Alert' button in the top right corner of the table. The page also includes a 'View' dropdown set to 'All Email Alerts' and a 'Create New View' link.

The details should be filled as shown:

The screenshot shows the 'Email Alerts' configuration page in Salesforce Setup. The left sidebar has a search bar with 'email al' and a list of categories: Process Automation, Workflow Actions, and Email Alerts (selected). The main content area is titled 'Email Alerts' and contains an 'Edit Email Alert' form. The form fields are: Description (Happy Birthday email alert), Unique Name (Happy_Birthday_email_alert), Object (Customer Account), Email Template (Birthday Offer Email), and Protected Component (unchecked). Below these is a 'Recipient Type' section with a search bar set to 'User' and a 'Find' button. Underneath are two columns: 'Available Recipients' (listing User: Integration User, User: Security User, and User: Vyshtnavi Team) and 'Selected Recipients' (with an 'Email Field: Email ID' dropdown). Between the columns are 'Add', 'Remove', and 'Move' buttons. At the top right of the form are 'Save', 'Save & New', and 'Cancel' buttons. A red 'Required Information' banner is visible at the top right of the form area.

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

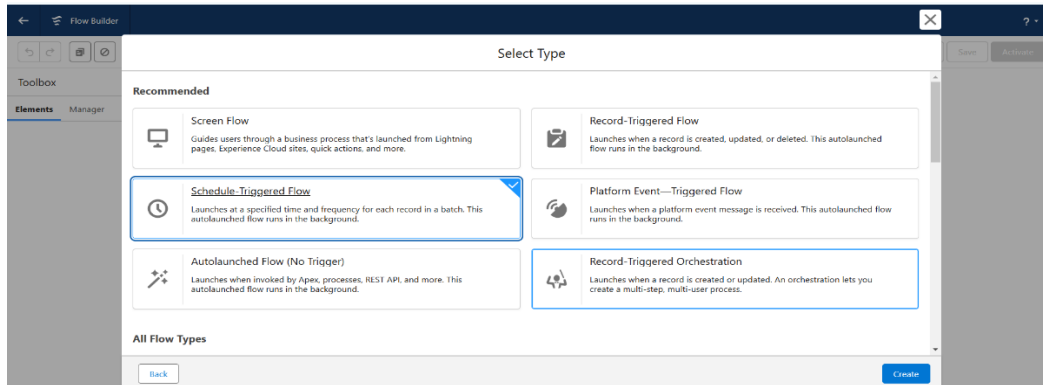
11.Flows creation:

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

The screenshot shows the 'Flows' configuration page in Salesforce Setup. The left sidebar has a search bar with 'flows' and a list of categories: Process Automation (selected), Flows, and Identity (with a sub-item 'Login Flows'). The main content area is titled 'Flows' and contains a 'Try the Automation Lightning App!' section with a list of features: Search for automations, Sort your list views with more options, and Organize your automations with categories and subcategories. Below this is a 'Flow Definitions' section with a dropdown menu set to 'All Flows'. A table lists 50+ items, sorted by Flow Label, filtered by All flow definitions, and updated a few seconds ago. The table has columns: Flow Label, Process Type, Active, Tem..., Package State, Pack..., Last Modifi..., and Last Modified Date. The table lists several flows, including 'Add or Modify Service Appointment Attendees', 'Approvals Workflow: Evaluate Approval Requests', 'Approvals Workflow: Process Approval Submission', 'Basic Approval Request', and 'Salesforce Scheduler Flow'.

Flow Label	Process Type	Active	Tem...	Package State	Pack...	Last Modifi...	Last Modified Date
Add or Modify Service Appointment Attendees	Salesforce Scheduler Flow	✓	□	Managed-Installed			
Approvals Workflow: Evaluate Approval Requests	Screen Flow	✓	✓	Managed-Installed			
Approvals Workflow: Process Approval Submission	Screen Flow	✓	□	Managed-Installed			
Basic Approval Request	Flow Orchestration for CMS	✓	✓	Managed-Installed			
Salesforce Scheduler Flow	Salesforce Scheduler Flow	✓	✓	Managed-Installed			

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

* API Name ⓘ

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_a * Record ID ⓘ

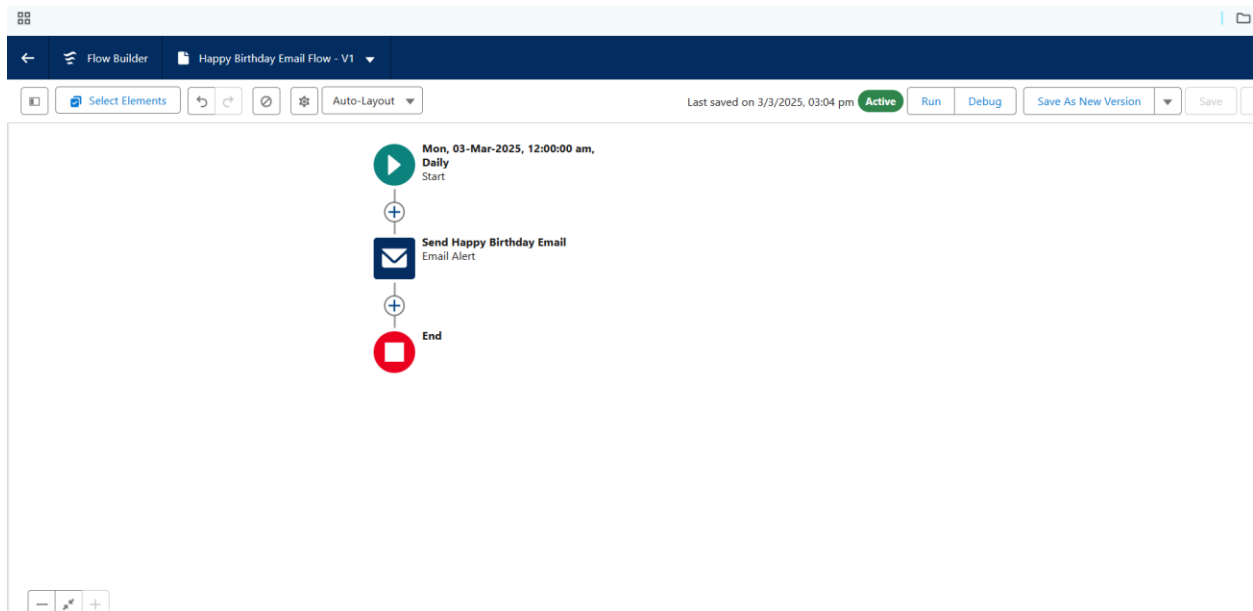
A_a

Triggering Customer_Account_c > Record ID

×

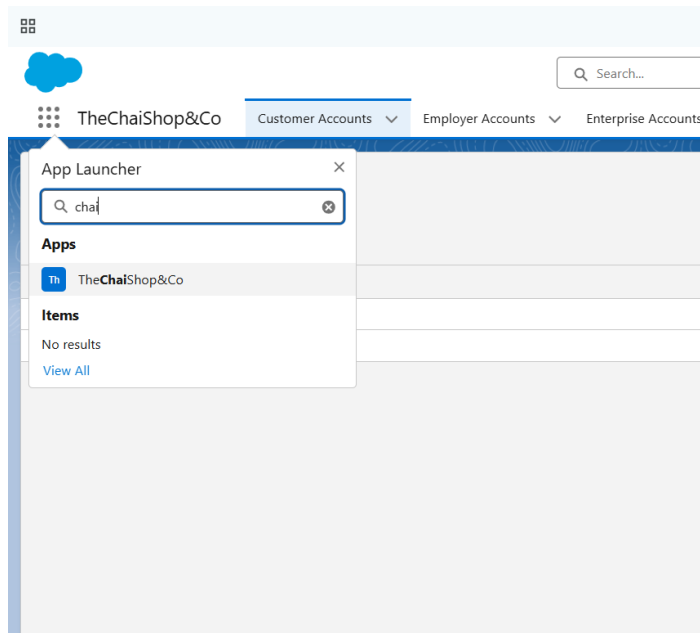
> Show advanced options

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.

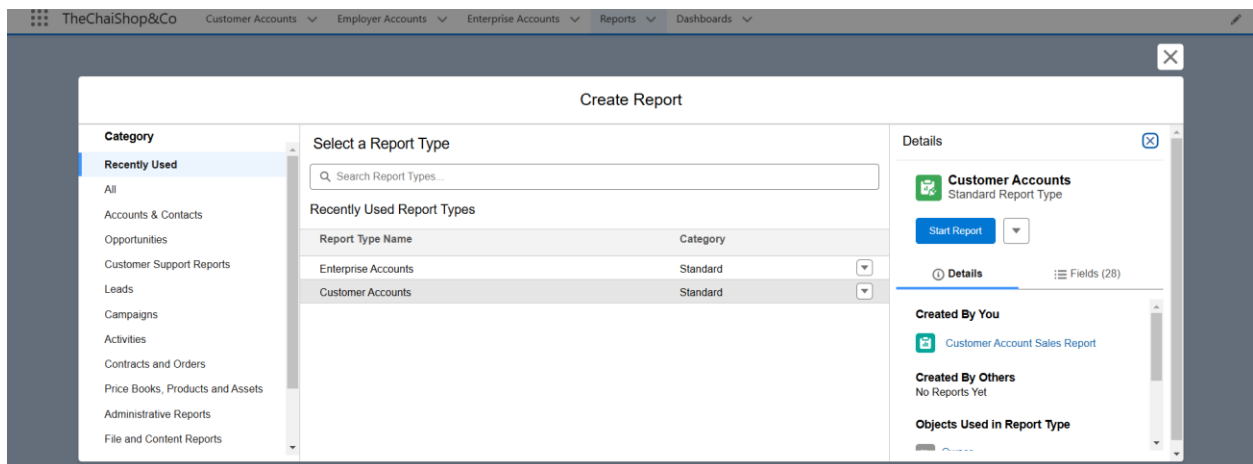


Click Reports

Click New Report

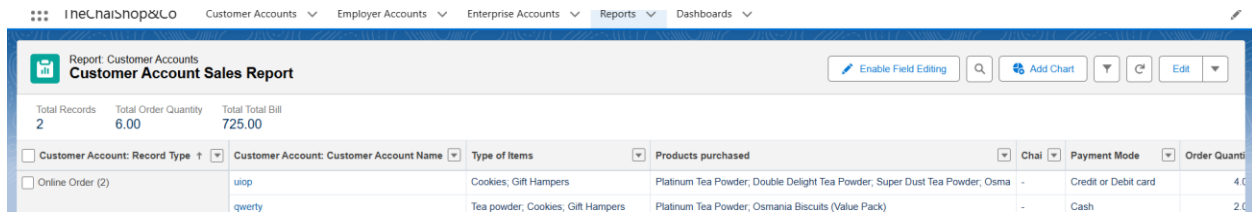
In search type Customer Accounts and Select Customer Accounts.

Click Start Report.



Group Rows: Search and Select
Customer Account: Record Type

Click Add Chart on the top.



The screenshot shows the 'Reports' section of the InetShop & Co. application. The 'Customer Accounts' report is selected, displaying a table with columns: Customer Account: Record Type, Customer Account: Customer Account Name, Type of Items, Products purchased, Chai, Payment Mode, and Order Quantity. The table contains two rows of data. Above the table, there are summary statistics: Total Records (2), Total Order Quantity (6.00), and Total Total Bill (725.00). At the top right, there are buttons for 'Enable Field Editing', 'Add Chart', and 'Edit'.

Customer Account: Record Type	Customer Account: Customer Account Name	Type of Items	Products purchased	Chai	Payment Mode	Order Quantity
Online Order (2)	uop	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

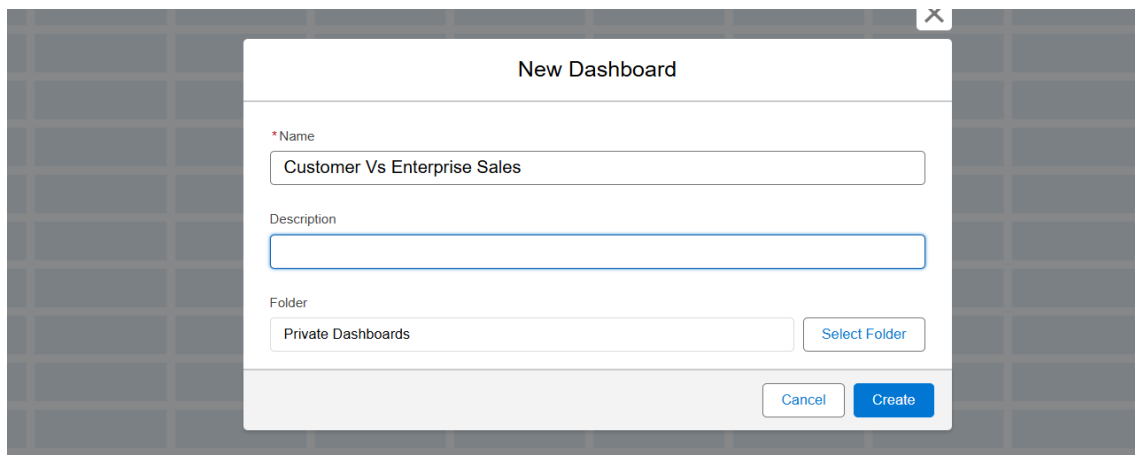
Click save with name Customer accounts sales report.

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

Dashboards

Now go to dashboards and click new.

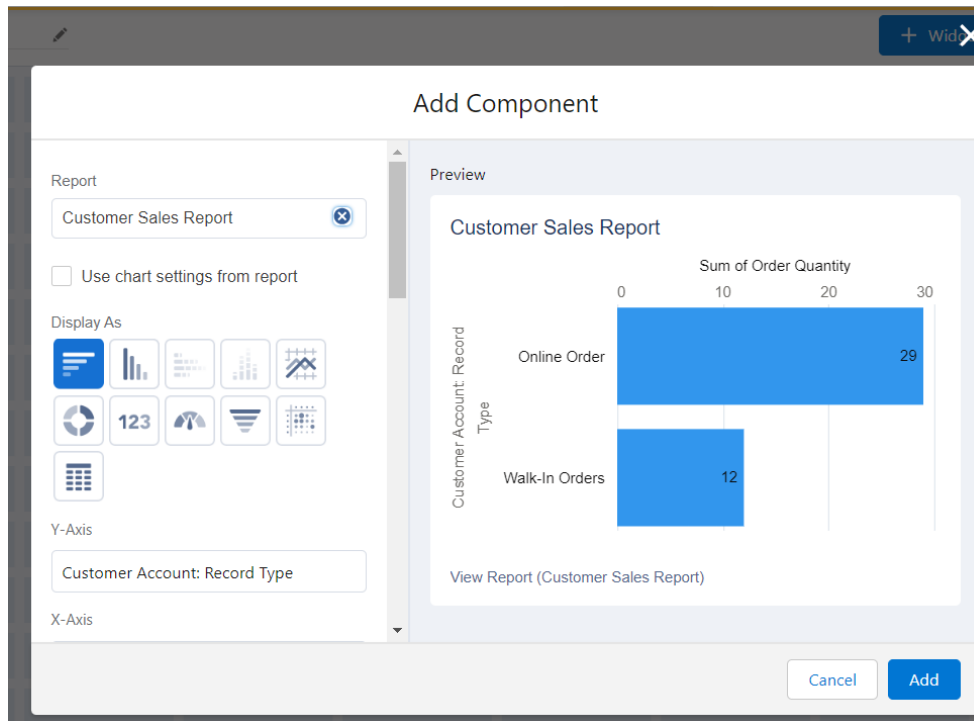
Create a dashboard named Customer vs Enterprise sales



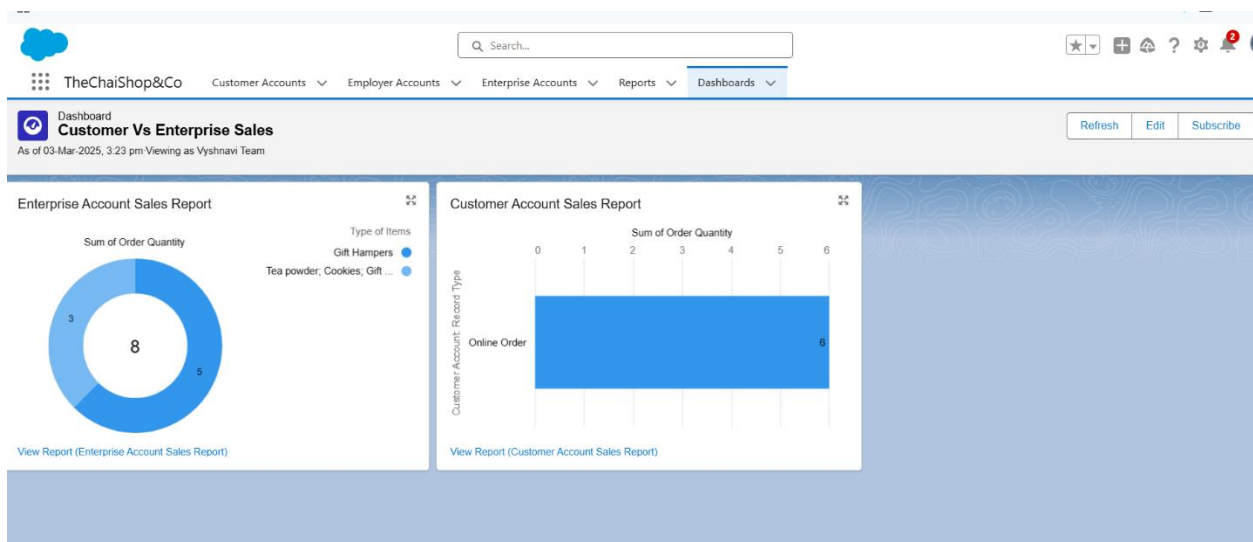
The screenshot shows a 'New Dashboard' form with the following fields and buttons:

- Name:** A text input field containing 'Customer Vs Enterprise Sales'.
- Description:** A text input field.
- Folder:** A dropdown menu showing 'Private Dashboards' and a 'Select Folder' button.
- Buttons:** 'Cancel' and 'Create' buttons at the bottom right.

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.