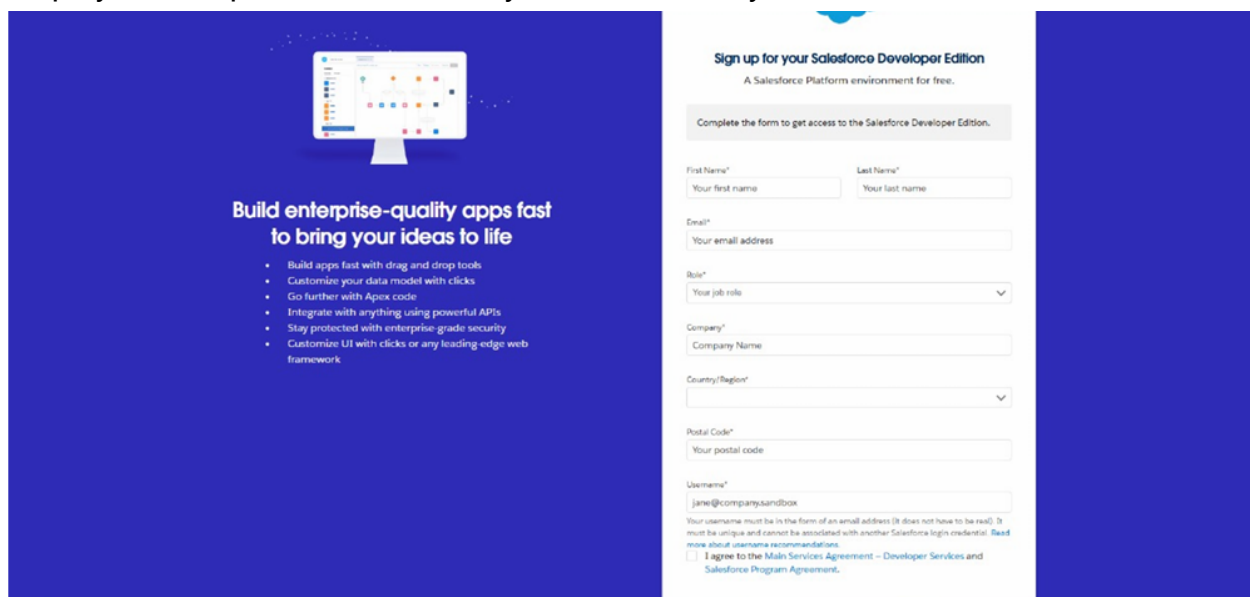


# A CRM APPLICATION FOR LAPTOP RENTALS

CRM Application on Laptop rentals is about delivering the items to the customers by rental purpose. It leverages the power of customer relationship management (CRM) to enhance customer experiences, optimize store operations, and improve overall efficiency. Additionally to these, we also need to do an effective CRM i.e via communicating through email with the potential customers identified.

## ***Salesforce:***

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers. Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.



The image displays two side-by-side panels. The left panel has a dark blue background and features a white monitor icon showing a dashboard. Below the icon, the text reads: "Build enterprise-quality apps fast to bring your ideas to life". This is followed by a bulleted list of features: "Build apps fast with drag and drop tools", "Customize your data model with clicks", "Go further with Apex code", "Integrate with anything using powerful APIs", "Stay protected with enterprise-grade security", and "Customize UI with clicks or any leading edge web framework". The right panel is a white sign-up form titled "Sign up for your Salesforce Developer Edition" with the subtitle "A Salesforce Platform environment for free." Below this is a grey box stating "Complete the form to get access to the Salesforce Developer Edition." The form contains several input fields: "First Name\*" and "Last Name\*" (with subtext "Your first name" and "Your last name"), "Email\*" (with subtext "Your email address"), "Role\*" (with a dropdown menu and subtext "Your job role"), "Company\*" (with subtext "Company Name"), "Country/Region\*" (with a dropdown menu), "Postal Code\*" (with subtext "Your postal code"), and "Username\*" (with subtext "jane@company.sandbox"). Below the username field is a note: "Your username must be in the form of an email address (it does not have to be real). It must be unique and cannot be associated with another Salesforce login credential. Read more about username recommendations." At the bottom of the form is a checkbox labeled "I agree to the Main Services Agreement - Developer Services and Salesforce Program Agreement."

## ***Object Creation:***

What Is an Object? Salesforce objects are database tables that permit you to store data that is specific to an organization. What are the types of Salesforce objects Salesforce objects are of two types:

1. Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.

2. Custom Objects: Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

### **Create Total Laptops Object :**

- From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
- Enter the label name>> Total Laptops
- Plural label name>> Total Laptops
- Enter Record Name Label and Format  
Record Name >>Total Laptops  
Data Type >> Text
- Click on Allow reports,Allow search and Track Field History.
- Allow search >> Save.

The screenshot shows the Salesforce Setup interface for the 'Total Laptops' custom object. The breadcrumb trail is 'SETUP > OBJECT MANAGER'. The left sidebar contains a list of configuration options: 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, Restriction Rules, and Scoping Rules. The 'Details' section is active, showing the following configuration:

| Field               | Value                               |
|---------------------|-------------------------------------|
| Description         |                                     |
| API Name            | Total_Laptops__c                    |
| Custom              | <input checked="" type="checkbox"/> |
| Singular Label      | Total Laptops                       |
| Plural Label        | Total Laptops                       |
| 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 |

Buttons for 'Edit' and 'Delete' are located in the top right corner of the details section.

### **Create consumer Object :**

- From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
- Enter the label name >> consumer
- Plural label name >> consumer
- Enter Record Name Label and Format Record Name >> consumer\_name Data Type >> Name

- Click on Allow reports, Allow search and Track Field History,
- Allow search >> Save.

SETUP > OBJECT MANAGER  
**consumer**

**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  
Restriction Rules  
Scoping Rules

**Details**

Description

API Name  
consumer\_\_c

Custom  
✓

Singular Label  
consumer

Plural Label  
consumer

Enable Reports  
✓

Track Activities  
✓

Track Field History  
✓

Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

Edit Delete

## Create Laptop Bookings Object :

- From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
- Enter the label name >> Laptop Bookings
- Plural label name >> Laptop Bookings
- Enter Record Name Label and Format  
Record Name >> Laptop Bookings  
Data Type >> Name
- Click on Allow reports, Allow search and Track Field History.
- Allow search >> Save.

SETUP > OBJECT MANAGER  
**Laptop Bookings**

**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  
Restriction Rules  
Scoping Rules

**Details**

Description

API Name  
Laptop\_Bookings\_\_c

Custom  
✓

Singular Label  
Laptop Bookings

Plural Label  
Laptop Bookings

Enable Reports  
✓

Track Activities  
✓

Track Field History  
✓

Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

Edit Delete

## Create Billing Process Object :

- From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
- Enter the label name >> Billing Process
- Plural label name >> Billing Process
- Enter Record Name Label and Format Record Name >> Billing Process Data Type >> Name
- Click on Allow reports, Allow search and Track Field History.
- Allow search >> Save.

The screenshot shows the Salesforce Object Manager interface for the 'Billing Process' object. The breadcrumb trail at the top reads 'SETUP > OBJECT MANAGER'. The page title is 'Billing Process'. On the left, a sidebar lists various configuration options: Details (selected), 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, Restriction Rules, and Sharing Rules. The main content area is titled 'Details' and contains several fields: 'Description' (empty), 'API Name' (Billing\_Process\_\_c), 'Custom' (checked), 'Singular Label' (Billing Process), and 'Plural Label' (Billing Process). On the right side, there are three checkboxes: 'Enable Reports' (checked), 'Track Activities' (unchecked), and 'Track Field History' (checked). Below these are 'Deployment Status' (Deployed), 'Help Settings' (Standard salesforce.com Help Window), and a red asterisk icon.

## Tabs

**What is a tab :** A tab is like a user interface that is used to build records for objects and to view the records in the objects.

### Types of Tabs:

- **Custom Tabs:** Custom object tabs are the user interface for custom applications that you build in salesforce.com. They look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.
- **Web Tabs:** Web Tabs are custom tabs that display web content or applications embedded in the salesforce.com window. Web tabs make it easier for your users to quickly access content and applications they frequently use without leaving the salesforce.com application.

- **Visual force Tabs:** Visual force Tabs are custom tabs that display a Visual force page. Visual force tabs look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.
- **Lightning Component Tabs:** Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app.
- **Lightning Page Tabs:** Lightning Page Tabs let you add Lightning Pages to the mobile app navigation menu. Lightning Page tabs don't work like other custom tabs. Once created, they don't show up on the All Tabs page when you click the Plus icon that appears to the right of your current tabs. Lightning Page tabs also don't show up in the Available Tabs list when you customize the tabs for your apps.

### ***Creating a Custom Tab:***

#### ***To create a Tab:***

- Go to setup page >> Type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)
- Select Object(Total Laptops) >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) uncheck the include tab .
- Make sure that the Append tab to users' existing personal customizations is checked.
- Click save.

### ***The Lightning App:***

An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar. Lightning apps let you brand your apps with a custom color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your org can work more efficiently by easily switching between apps.

## **Create a Lightning App:**

### **To create a lightning app page:**

- Go to setup page >> search “app manager” in quick find >> select “app manager” >> click on New lightning App.
- Fill the app name in app details as LAPTOP RENTALS >>Next >> (App option page) keep it as default >> Next >> (Utility Items) keep it as default >> Next.
- Upload a photo that is related to your app.
- To Add Navigation Items: Select the items (Total Laptops,consumer,Laptop Booking,Billing Process) from the search bar and move it using the arrow button >> Next.
- To Add User Profiles: Search profiles (System administrator) in the search bar >> click on the arrow button >> save & finish.

### **Fields:**

When we talk about Salesforce, Fields represent the data stored in the columns of a relational database. It can also hold any valuable information that you require for a specific object. Hence, the overall searching, deletion, and editing of the records become simpler and quicker.

#### **Types of Fields:**

1. Standard Fields
2. Custom Fields

#### **Standard Fields:**

As the name suggests, the Standard Fields are the predefined fields in Salesforce that perform a standard task. The main point is that you can't simply delete a Standard Field until it is a non-required standard field. Otherwise, users have the option to delete them at any point from the application freely. Moreover, we have some fields that you will find common in every Salesforce application. They are,

>>Created By

>>Owner

>> Last Modified

>> Field Made During object Creation

### **Custom Fields:**

On the other side of the coin, Custom Fields are highly flexible, and users can change them according to requirements. Moreover, each organizer or company can use them if necessary. It means you need not always include them in the records, unlike Standard Fields. Hence, the final decision depends on the user, and he can add/remove Custom Fields of any given form.

Creating the field in consumer object:

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(consumer) in search bar >> click on the object.
2. Now click on "Fields & Relationships" >> New
3. Select Data Type as a "Phone"
4. Click on next

#### **To create another field in an object:**

1. Go to setup >> click on Object Manager >> type object name(consumer) in search bar >> click on the object.
2. Now click on "Fields & Relationships" >> New
3. Select Data type as a "Email" and Click on Next

### **Creating the field in Laptops Bookings object:**

**To create fields in an object:**

1. Go to setup >> click on Object Manager >> type object name(Laptop Booking) in the search bar >> click on the object.
2. Now click on "Fields & Relationships" >> New
3. Select Data Type as a "Picklist"
4. Picklist values are:-1.Dell 2. Acer 3.Hp 4.Mac
5. Select required
6. Click on Next >> Next >> Save and new

### ***To Create a Fields & Relationship to an Laptop Booking Object:***

**To create fields & relationships to an object:**

1. Go to setup >> click on Object Manager >> type object name(Laptop Booking) in the search bar >> click on the object.
2. Now click on "Fields & Relationships" >> New
3. Select Data Type as a "Picklist"
4. Picklist values are:-1.core i3 2. Core i5 3. Core i7 .
5. Select required

6. Click on Next >> Next >> Save and new
7. Go to setup >> click on Object Manager >> type object name(Laptop Booking) in the search bar >> click on the object.
8. click field dependency and next
9. Click the include value for dell-core i3,i5,i7 and for acer i3,i4,i5 and for hp i3,i4,i5 and also for mac bionic chip include the values for it.

### To Create a Fields & Relationship for Billing Process Object

1. Go to setup >> click on Object Manager >> type object name(Billing Process) in the search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data Type as a “Master-detail Relationship”
4. Click on Next
5. Click on the Related to drop down and Select the consumer object and click on Next
6. Change the Field Label: Name
7. click on Next >> Next >> Save and new.

### *Creation of another fields for the billing process object :*

#### To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Billing Process) in the search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data Type as a “Picklist”
4. Fill the Above as following:



Field Label: Payment Mode

Value >> Select enter values with each value separated by a new line

Cash

Check

Credit card

Debit card

UPI

Phonepe

Gpay

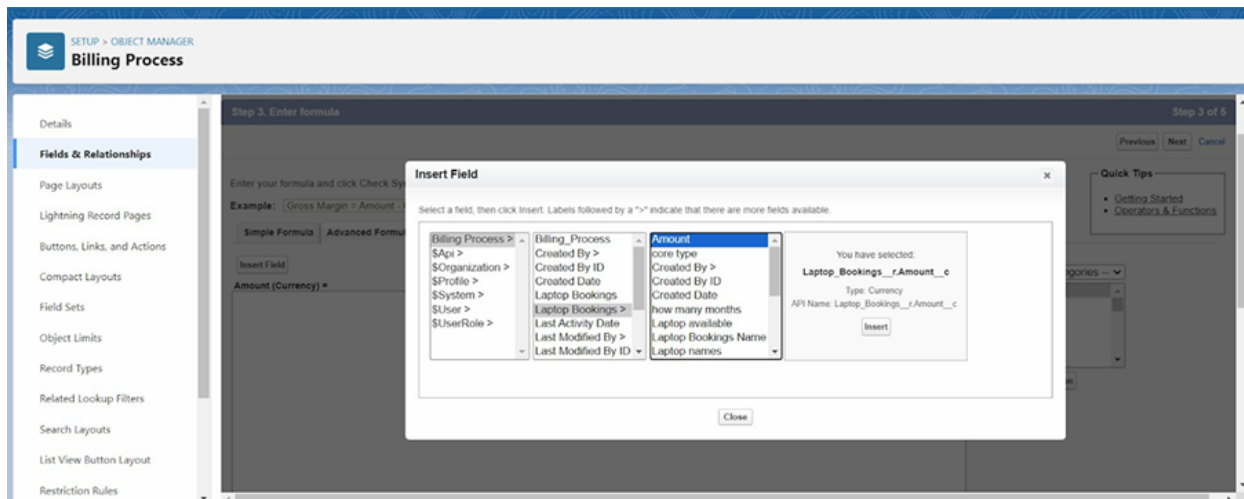
Paytm

Select required

Click on Next >> Next >> Save and new.

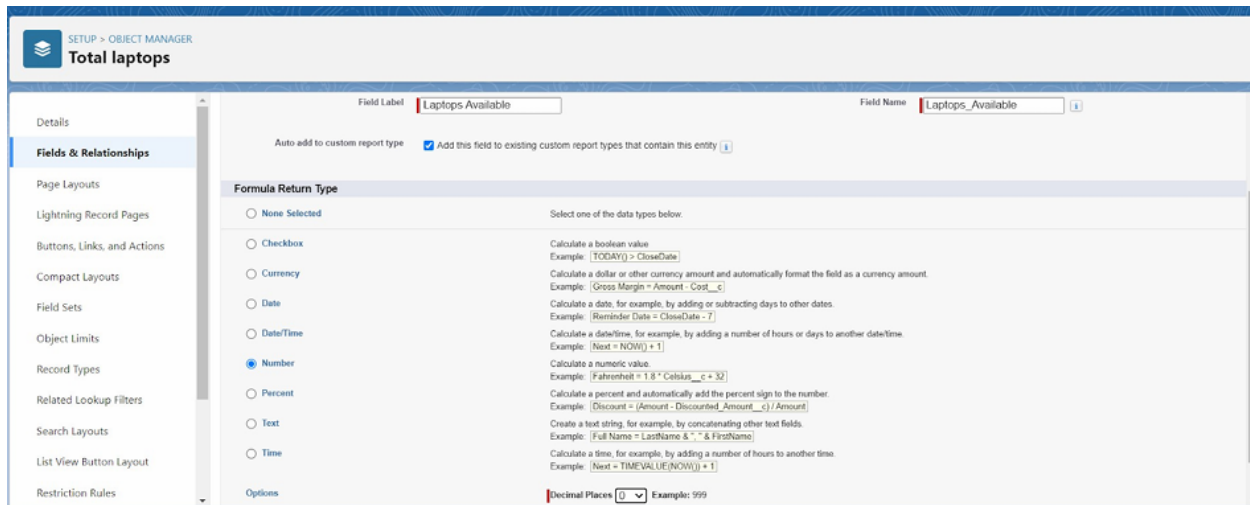
### ***Create a Cross object formula Field in billing process Object:***

1. Go to setup >> click on Object Manager >> type object name(Billing Process) in the search bar >> click on the object.
2. Now click on "Fields & Relationships" >> New
3. Select Data Type as a "Formula"
4. Click on Next
5. Enter the Field label: Amount, the Field name gets auto generated, and click on Next.(Formula return type Number).
6. In the Advanced Formula Click on the Insert field in the popup Screen Select the Billing Process and in the second drop down select the Laptop Booking and in the three drop down select the Amount field and click on Insert.
7. " Laptop\_Booking\_\_r.Amount\_\_c ".
8. Click on the Check syntax: No syntax errors in merge fields.



## Creating the field in Total Laptops object:

1. Go to setup >> click on Object Manager >> type object name(Total Laptops) in search bar >> click on the object.
2. Now click on "Fields & Relationships" >> New
3. Select Data type as a "Formula" and Click on Next
4. Fill the Above as following:
5. Field Label: Laptops Available
6. Field Name : It's gets auto generated
7. Select the Formula Return Type as "Number"
8. Select the Decimal places as "0" and Click on Next.



## Validation rule:

Validation rules are applied when a user tries to save a record and are used to check if the data meets specified criteria. If the criteria are not met, the validation rule triggers an error message and prevents the user from saving the record until the issues are resolved.

Improve the quality of your data using validation rules. Validation rules verify that the data a user enters in a record meets the standards you specify before the user can save the record. A validation rule can contain a formula or expression that evaluates the data in one or more fields and returns a value of "True" or "False". Validation rules also include an error message to display to the user when the rule returns a value of "True" due to an invalid value.

### ***Creating the validation rule for the phone number field in the consumer object:***

1. Go to the setup page - click on the object manager - From the drop down click edit for consumer object.
2. Click on the validation rule - click New.
3. Enter the Rule name as "Phonenumberoremailblankrule".
4. Enter the description as "phone number and email number should not be blank".
5. Enter the formula as "OR( ISBLANK( phone\_number\_\_c ) , ISBLANK( email\_\_c ) )" and check the syntax.
6. Save the validation rule.

The screenshot shows the Salesforce Setup interface for creating a validation rule. The breadcrumb trail at the top reads "SETUP > OBJECT MANAGER consumer". The left sidebar contains a navigation menu with the following 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 "Display an error if Discount is more than 30%" and includes the instruction "If this formula expression is **true**, display the text defined in the ErrorMessage area". Below this, there are "Insert Field" and "Insert Operator" buttons, and a text box containing the formula: "OR( ISBLANK( phone\_number\_\_c ) , ISBLANK( email\_\_c ) )". To the right of the formula is a "Functions" panel with a dropdown menu set to "All Function Categories". The panel lists functions: ABS, ACOS, ADDMONTHS, AND, ASCII, and ASIN. Below the list is an "Insert Selected Function" button and a description for the ABS function: "ABS(number) Returns the absolute value of a number, a number without its sign." Below the formula text box is a "Check Syntax" button with the text "No errors found" and a "Help on this function" link. Below the formula section is the "Error Message" section, which includes an "Example" of a discount rule, a note that the message appears when the formula is true, and a text box for the error message containing "Please fill the phone number and email id". At the bottom, there is a note about error message placement and an "Error Location" section with radio buttons for "Top of Page" (selected) and "Field" (with a dropdown arrow).

## ***Creating the validation rule for the phone number field in the consumer object:***

1. Go to the setup page >> click on the object manager >> From the drop down click edit for consumer object.
2. Click on the validation rule >> click New.
3. Enter the Rule name as "Phonenumberoremailblankrule".
4. Enter the description as "phone number and email number should not be blank".
5. Enter the formula as "OR( ISBLANK( phone\_number\_\_c ) , ISBLANK( email\_\_c ) )" and check the syntax.
6. Save the validation rule.

The screenshot shows the Salesforce Setup > Object Manager > consumer page. The left sidebar contains navigation links: 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 "Display an error if Discount is more than 30%". It includes a "Check Syntax" button and a "No errors found" message. The "Error Message" section shows an example: "Discount percent cannot exceed 30%". Below this, the "Error Message" field contains the text "Please fill the phone number and email id". The "Error Location" section has radio buttons for "Top of Page" (selected) and "Field". A "Functions" panel on the right lists various functions, including ABS, ACOS, ADDMONTHS, AND, ASCII, and ASIN. The "Insert Selected Function" button is visible.

## ***Profiles:***

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. Profile controls "Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visual force page access, Page layouts, Record Types, Login hours & Login IP ranges. You can define profiles by the user's job function. For example System Administrator, Developer, Sales Representative.

### **Types of profiles in salesforce:**

#### **1. Standard profiles:**

By default, Salesforce provides below standard profiles.

- Contract Manager
- Read Only
- Marketing User
- Solutions Manager
- Standard User
- System Administrator.

We cannot delete standard ones.

Each of these standard ones includes a default set of permissions for all of the standard objects available on the platform.

## 2. Custom Profiles:

Custom ones defined by us.

They can be deleted if there are no users assigned to that particular one.

### **Owner Profile:**

#### **To create a new profile:**

1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Standard User) >> enter profile name (owner) >> Save.

The screenshot shows the 'Profiles' page in Salesforce Setup. The profile name is 'owner'. It lists various permissions that are enabled, such as 'Login IP Ranges', 'Apex Class Access', 'Visualforce Page Access', etc. Below the permissions, there is a 'Profile Detail' section with buttons for 'Edit', 'Clone', 'Delete', and 'View Users'. The 'User License' is 'Salesforce'. The 'Description' is empty. The 'Created By' is 'udayrushi.velagandula' on '10/07/2023, 10:56 am'. The 'Modified By' is also 'udayrushi.velagandula' on '10/07/2023, 10:56 am'. The 'Page Layouts' section shows standard object layouts assigned to the profile, including Global, Email Application, Home Page Layout, Account, Alternative Payment Method, Appointment Invitation, Object Milestone, Operating Hours, Opportunity, Opportunity Product, Order, and Order Product.

Scroll down to Custom Object Permissions and Give access permissions for Total Laptops, consumers , Laptop Booking and Billing Process objects as mentioned in the below diagram.

The screenshot shows the 'Custom Object Permissions' section for the 'owner' profile. A blue arrow points to the 'Basic Access' tab. The permissions are as follows:

| Object          | Read                                | Create                              | Edit                                | Delete                              | View All                            | Modify All                          |
|-----------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Billing Process | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| consumers       | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Laptop Bookings | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Total Laptops   | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

The 'Session Settings' section shows 'Session Times Out After' set to '2 hours of inactivity' and 'Session Security Level Required at Login' set to '--None--'.

3. Give Access and Save it.

### **Agent Profile :**

1. Go to setup >> type profiles in the quick find box >> click on profiles >> clone the desired profile (Standard Platform User) >> enter profile name (Agent) >> Save.
2. While still on the profile page, then click Edit.
3. Scroll down to Custom Object Permissions and Give access permissions for Total Laptops, consumer, Laptop Bookings and Billing Process objects as mentioned in the below diagram.

The screenshot shows the Salesforce Setup Profiles page. The 'Custom Object Permissions' section is expanded, showing permissions for various objects. The 'Basic Access' and 'Data Administration' tabs are selected. The 'Basic Access' tab shows permissions for Read, Create, Edit, and Delete. The 'Data Administration' tab shows permissions for View All and Modify All. The objects listed are Billing Process, consumers, Laptop Bookings, and Total Laptops. All permissions are checked.

|                 | Basic Access                        |                                     |                                     |                                     | Data Administration      |                          |
|-----------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|--------------------------|
|                 | Read                                | Create                              | Edit                                | Delete                              | View All                 | Modify All               |
| Billing Process | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| consumers       | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Laptop Bookings | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Total Laptops   | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: --None--

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Lockout effective period: 15 minutes

### **Roles and Hierarchy:**

A role in Salesforce defines a user's visibility access at the record level. Roles may be used to specify the types of access that people in your Salesforce organization can have to data. Simply put, it describes what a user could see within the Salesforce organization.

#### **Creating owner Role:**

1. Go to quick find >> Search for Roles >> click on set up roles.
2. Click on Expand All and click on add role under whom this role works.

## Your Organization's Role Hierarchy

[Collapse All](#) [Expand All](#)

[-] Nick Enterprises

... Add Role

[-] CEO [Edit](#) | [Del](#) | [Assign](#)

... Add Role

[-] HR [Edit](#) | [Del](#) | [Assign](#)

... Add Role

[-] Manager [Edit](#) | [Del](#) | [Assign](#)

... Add Role

[-] On Site Emp [Edit](#) | [Del](#) | [Assign](#)

... Add Role

[-] Remote Emp [Edit](#) | [Del](#) | [Assign](#)

... Add Role

1. Give Label as "owner" and Role name gets auto populated. Then click on Save.

 **SETUP**  
**Roles**

Role Edit  
New Role

[Help for this Page](#)

### Role Edit

Label

Role Name  [i](#)

This role reports to  [Q](#)

Role Name as displayed on reports

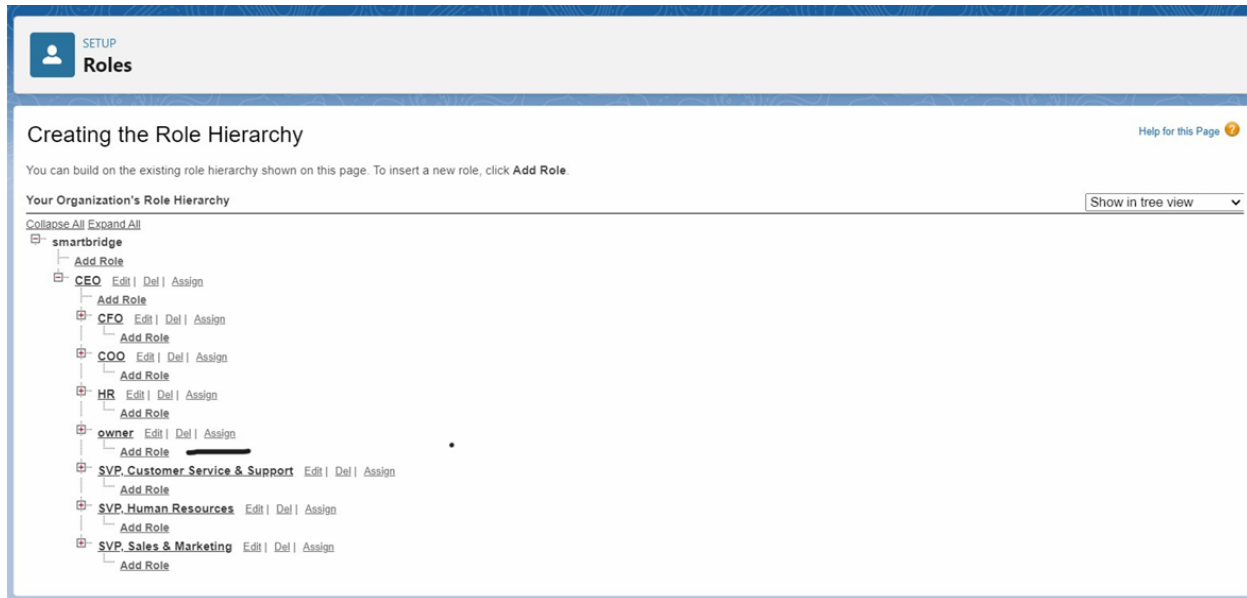
[Save](#) [Save & New](#) [Cancel](#)

2. Click and save it.

## Activity 2: Creating Agent roles:

Creating another two roles under the manager:

1. Go to quick find - Search for Roles - click on set up roles.
2. Click plus on the CEO role, and click add role under owner.



4. Give Label as "Agent" and Role name gets auto populated. Then click on Save.

## Users:

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access.

### Create User:

1. Go to setup - type users in the quick find box - select users -click New user.
2. Fill in the fields
3. First Name : Vicky
4. Last Name : y
5. Alias : Give an Alias Name
6. Email id : Give your Personal Email id
7. Username : Username should be in this form: text@text.text
8. Nick Name : Give a Nickname
9. Role : owner
10. User license : Salesforce
11. Profiles : owner.



SETUP

Users

New User

Help for this Page

User Edit

SaveSave & NewCancel

General Information

= Required Information

First Namevicky

Last Namerushi

Aliasvrush

Emailudayrushi00@gmail.com

Usernameudayrushi00@456789gmail

Nicknamevicky

Title

Company

Department

Division

Roleowner

User LicenseSalesforce

ProfileStandard User

Active☒

Marketing User☐

Offline User☐

Knowledge User☐

Flow User☐

Service Cloud User☐

Site.com Contributor User☐

Site.com Publisher User☐

WDC User☐

Data.com User Type--None--

Data.com Monthly Addition LimitDefault Limit (300)

Accessibility Mode (Classic Only)

Save it.

## Activity 2: creating another user

1. Go to setup -type users in the quick find box - select users -click New user.
2. Fill in the fields
3. First Name : ram
4. Last Name : ram
5. Alias : Give an Alias Name
6. Email id : Give your Personal Email id
7. Username : Username should be in this form: text@text.text
8. Nick Name : Give a Nickname
9. Role : Agent
10. User license : Salesforce platform
11. Profiles : standard platform user.

SETUP Users

### New User

Help for this Page

User Edit Save Save & New Cancel

General Information ⓘ = Required Information

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Title

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Department

Division

Role Agent ⓘ

User License Salesforce Platform

Profile Standard Platform User ⓘ

Active ☒

Marketing User ☐

Offline User ☐

Knowledge User ☐

Flow User ☐

Service Cloud User ☐

Site.com Contributor User ☐

Site.com Publisher User ☐

WDC User ☐

Data.com User Type --None-- ⓘ

Data.com Monthly Addition Limit Default Limit (300) ⓘ

Accessibility Mode (Classic Only) ⓘ

Save it.

## ***Flows:***

In Salesforce, a flow is a powerful tool that allows you to automate business processes, collect and update data, and guide users through a series of screens or steps. Flows are built using a visual interface and can be created without any coding knowledge.

In Salesforce, "flows" typically refer to Salesforce Flow, which is a powerful automation tool that allows you to create custom, automated processes in your Salesforce org without writing code. Salesforce Flow is a point-and-click tool that enables you to design and automate complex business processes, collect data, and interact with users in a visual interface. There are different types of flows in Salesforce, including: Screen Flows: These are used to guide users through a series of screens to collect or display information. Screen Flows are often used for data entry and updates.

**Auto launched Flows:** These are flows that are triggered by events, such as when a record is created or updated. They don't require user interaction and can be used for background automation.

**Flow Builder:** Flow Builder is the visual interface used to create flows. It allows you to design flows by adding elements, like screens, logic, and actions, using a drag-and-drop approach.

**Flow Templates:** Salesforce provides a library of pre-built flow templates that you can use as a starting point for your own flows. These templates cover a variety of use cases, from simple to complex.

### ***Create a Flow on Dell laptop:***

1. Go to Setup and type "Flow" in the Quick Find box.
2. Select "Flow" and click "New Flow".
3. Choose "Record-Triggered Flow" and click "Create".
4. Select "Laptop Booking" from the object dropdown.
5. Set the trigger as "A record is Created or Updated".
6. Optimize the flow for "Actions and Related Records".
7. Click "+" under the flow canvas and select "Decision".
8. Set the label to "Update" (API name auto-generates).
9. Add outcomes for Dell, Acer, HP, and Mac.
10. After the laptop model decision, add another decision for the core type (i3, i5, i7).
11. Define conditions for core types (e.g., "core type equals i3").
12. Add outcomes for Dell core types (i3, i5, i7).
13. After the core type decision, add another decision for months (1-5).
14. Set conditions for months (e.g., "how many months equals 1").

15. Add outcomes for months selected (1, 2, 3, 4, 5).
16. Add an "Update Record" action based on month selection.
17. Set Amount\_\_c values for Dell i3 (1000, 2000, etc.).
18. Repeat the process for Dell i5 and i7 with corresponding amounts.
19. Connect outcomes to the appropriate update record actions.
20. Save and activate the flow.

**\*\*Similarly, we did for the remaining laptops also.**

### ***Creating Classes :***

Apex classes are modeled on their counterparts in Java. You'll define, instantiate, and extend classes, and you'll work with interfaces, Apex class versions, properties, and other related class concepts.

- Class:
  - As in Java, you can create classes in Apex. A class is a template or blueprint from which objects are created. An object is an instance of a class.
- Object
  - Object is an instance of a class, where it can access all the properties that are present in a class i.e, variables and methods.

### **Steps to create a class in APEX:**

1. Login to the trailhead account and navigate to the gear account in the top right corner.
2. Then we can see the Developer console. Click on the developer console, and you will navigate to a new console window.
3. Then you can see many tools in the Toolbar of the new console window. Click on File, New, and Apex Class.
4. Enter the name of the class to create a new class file.

### **Trigger code:**

```
trigger LaptopBooking on Laptop_Bookings__c (After insert,after update) {  
    if(trigger.isAfter && ( trigger.isInsert || trigger.isupdate)){  
        LaptopBookingHandler.sendEmailNotification(trigger.new);  
    }  
}
```

1.LaptopBooking - trigger name

2.Laptop\_Bookings\_\_c -as per your org(go to laptop bookings object and copy from that object api name).

```
public class LaptopBookingHandler {  
    public static void sendEmailNotification (List lapList){  
        for(Laptop_Bookings__c lap:lapList){
```

```

        Messaging.SingleEmailMessage email = new
Messaging.SingleEmailMessage();
        email.setToAddresses( new List{lap.Email__c});
        email.setSubject('Welcome to our company');
        string body = 'Dear'+ lap.Name +', \n';
        body += 'Welcome to Laptop Rentals! You have been seen as a
valuable customer to us.\n Please continue your journey with us, while we try to provide
you with good quality resources. \n Laptop Amount = ' + lap.Amount__c + ' \n core type
= '+lap.core__c + ' \n Laptop type = '+lap.Laptop_type__c;
        email.setPlainTextBody(body);
        Messaging.sendEmail(new List{email});
    }
}
}

```

1.Class name:- LaptopBookingHandler

2.API Name:- Laptop\_Bookings\_\_c(as per your org go to laptop booking object and copy from that).

3.core\_\_c (as per your org, go to laptop booking object and copy from that).

4.Laptop\_type\_\_c. (as per your org go to laptop booking object and copy from that).

In this project , trigger is called whenever the particular record's sum exceeds the threshold i.e minimum business requirement value. Then the code in the trigger will get executed.

### **Create Report:**

1. Go to the app -click on the reports tab

2. Click New Report.

3. Select report type from the category or from the report type panel or from the search panel "consumer with Laptop Bookings and total laptops" >> click on start report.

4. Customize your report

5. Add fields from the left pane as shown below

**LAPTOPRENTALS** Total Laptops consumers Laptop Bookings Billing Process **Report Builder**

REPORT consumer with laptops and total laptops consumers with Laptop Bookings and Total Laptops

Previewing a limited number of records. Run the report to see everything.

Update Preview Automatically

| types of versions | Laptop Bookings: Laptop Bookings Name | consumer: consumer Name | Total no of l... | Laptop names | core type   | Amount  |
|-------------------|---------------------------------------|-------------------------|------------------|--------------|-------------|---------|
| intermediate (6)  | smartinternz                          | sure                    | 50               | Dell         | core i3     | ₹3,000  |
|                   | smartinternz                          | sure                    | 50               | Dell         | core i7     | ₹4,000  |
|                   | smartinternz                          | rakesh                  | 50               | Dell         | core i5     | ₹3,000  |
|                   | smartinternz                          | sure                    | 50               | Acer         | core i3     | ₹2,700  |
|                   | stacknexus                            | sure                    | 50               | Acer         | core i3     | ₹3,600  |
|                   | Sandeep                               | uday                    | 50               | Acer         | core i3     | ₹1,800  |
| Subtotal          |                                       |                         |                  |              |             | ₹18,100 |
| high (8)          | smartinternz                          | rakesh                  | 50               | Mac          | Bionic chip | ₹8,000  |
|                   | smartinternz                          | sure                    | 50               | Acer         | core i5     | ₹6,500  |
|                   | google                                | rushi                   | 50               | Dell         | core i5     | ₹6,000  |
|                   | Flash                                 | sure                    | 50               | Acer         | core i7     | ₹7,200  |
|                   | shivam                                | rushi                   | 50               | Hp           | core i3     | ₹6,000  |
|                   | code hub                              | uday                    | 50               | Mac          | Bionic chip | ₹8,000  |
|                   | code hub                              | rushi                   | 50               | Mac          | Bionic chip | ₹8,000  |
|                   | smartinternz                          | sure                    | 50               | Hp           | core i5     | ₹5,100  |

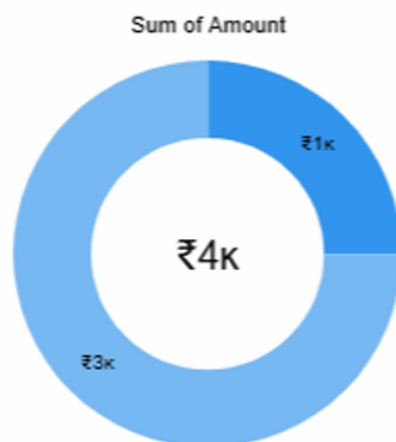
Row Counts Detail Rows Subtotals Grand Total Conditional Formatting

1. Click the column drop down and select bucket list.
2. Click apply it.

### Create Dashboard Folder:

1. Click on the app launcher and search for the dashboard.
2. Click on the dashboard tab.
3. Click the new folder, give the folder label as "total rent amount".
4. Folder unique names will be auto populated.
5. Click save.

consumer with laptops and total laptops



types of versions

high

intermediate

[View Report \(consumer with laptops and total laptops\)](#)