

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

Introduction:

Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don't know where you should start on your learning journey? If you've answered yes to any of these questions, then you're in the right place. This module is for you.

Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module, we'll take you through these features and answer the question, "What is Salesforce, anyway?"

What Is 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.

So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this:

<https://youtu.be/r9EX3IGde5k>

Creating a developer org in salesforce.

1. Go to <https://developer.salesforce.com/signup>
2. On the sign up form, enter the following details :

- 1) First name & Last name
- 2) Email
- 3) Role : Developer
- 4) Company : College Name
- 5) County : India
- 6) Postal Code : pin code

7) Username : should be a combination of your name and company

This need not be an actual email id, you can give anything in the format :
username@organization.com

Click on sign me up after filling these.

Account Activation

1. 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.

2. Click on Verify Account.

3. Give a password and answer a security question and click on change password.

4. Then you will redirect to your salesforce setup page.

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.

To **Navigate** **to** **Setup** **page:**
 Click on gear icon >> click setup.

To create an object:

1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
2. On Custom object defining page:
3. Enter the label name, plural label name, click on Allow reports, Allow search.
4. Click on Save.

Create Total Laptops Object

1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.

1) Enter the label name>> Total Laptops

2) Plural label name>> Total Laptops

3) Enter Record Name Label and Format

Record Name >>Total Laptops

Data Type >> Text

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

Create consumer Object

From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.

1) Enter the label name >> consumer

2) Plural label name >> consumer

3) Enter Record Name Label and Format

Record Name >> consumer_name

Data Type >> Name

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

Create Laptop Bookings Object

From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.

1) Enter the label name >> Laptop Bookings

2) Plural label name >> Laptop Bookings

3) Enter Record Name Label and Format

Record Name >> Laptop Bookings

Data Type >> Name

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

Create Billing Process Object

From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.

1) Enter the label name >> Billing Process

2) Plural label name >> Billing Process

3) Enter Record Name Label and Format

Record Name >> Billing ProcessName

Data Type >> Name

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

Tabs

What is 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:

1. 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.

2. **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.

1. Visualforce Tabs

Visualforce Tabs are custom tabs that display a Visualforce page. Visualforce tabs look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.

2. Lightning Component Tabs

Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app.

3. 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:

1. Go to setup page >> Type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)
2. 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 .
3. Make sure that the Append tab to users' existing personal customizations is checked.
4. Click save.

Activity 2: Creating Remaining Tabs

Now create the Tabs for the remaining Objects, they are "consumer,Laptop Booking,Billing process".

Follow the same steps as mentioned in Activity -1 .

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:

1. Go to setup page >> search "app manager" in quick find >> select "app manager" >> click on New lightning App.

2. 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.

3. Upload a photo that is related to your app.

4. To Add Navigation Items:

5.

Select the items (Total Laptops, consumer, Laptop Booking, Billing Process) from the search bar and move it using the arrow button >> Next.

6. 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
 - Fill the Above as following:
 - Field Label: Phone number
 - Field Name : gets auto generated
 - Click the required option checkbox.
 - Click on Next >> Next >> Save and new.

To create another 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 "Email" and Click on Next
4. Fill the Above as following:
 - Field Label: Email
 - Field Name :It's gets auto generated
 - Click on Next >> Next >> Save and new.

The screenshot shows the 'New Custom Field' page in the Salesforce Object Manager. The 'Field Label' is set to 'Email'. The 'Required' checkbox is checked. The 'Auto add to custom report type' checkbox is also checked. Other fields like 'Field Name', 'Description', and 'Help Text' are present but not filled.

To create another 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 "Text Area" and Click on Next
4. Fill the Above as following:
 - Field Label: Address
 - Field Name : It's gets auto generated
 - Select Required field.
 - Click on Next >> Next >> Save and new.

The screenshot shows the 'New Custom Field' page in the Salesforce Object Manager. The 'Field Label' is set to 'Address'. The 'Required' checkbox is checked. The 'Auto add to custom report type' checkbox is also checked. Other fields like 'Field Name', 'Description', and 'Help Text' are present but not filled.

To create another 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 "Picklist" and Click on Next
4. Fill the Above as following:
 - Field Label: consumer Status

- Value - Select enter values with each value separated by a new line
- Student
- Employee
- Others
- Select required
- Field Name : It's gets auto generated
- Click on Next >> Next >> Save and new.

SETUP > OBJECT MANAGER
consumer

Fields & Relationships

Field Label: consumer status

Values:

- Use global picklist value set
- Enter values, with each value separated by a new line

student
employee
others

Field Name: consumer_status

Description:

Help Text:

Required:

- Always require a value in this field in order to save a record
- Add this field to existing custom report types that contain this entity

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

SETUP > OBJECT MANAGER
Laptop Bookings

Fields & Relationships

Field Label: Laptop names

Values:

- Use global picklist value set
- Enter values, with each value separated by a new line

Dell
Acer
Hp
Mac

Field Name: Laptop_type

Description:

Help Text:

Required:

- Always require a value in this field in order to save a record
- Add this field to existing custom report types that contain this entity

5. Select required

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

2. To Create a Fields & Relationship to an Laptop Booking Object
To create fields & relationship 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 .

The screenshot shows the 'Object Manager' page for 'Laptop Bookings'. The left sidebar has options like Details, Fields & Relationships (selected), 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 area shows a picklist configuration for a field labeled 'core type'. The 'Values' section contains 'core i3', 'core i5', 'core i7', and 'Bionic chip'. Other settings include 'Field Name: core', 'Description: ', 'Help Text: ', and checkboxes for 'Required' (checked), 'Always require a value in this field in order to save a record' (checked), and 'Add this field to existing custom report types that contain this entity' (checked).

5. Select required
6. Click on Next >> Next >> Save and new

NOTE:-

Field Dependency:

1. A field dependency refers to a relationship between two fields on an object where the values of one field determine the available values for another field. Field dependencies are commonly used to create picklist field relationships, where the available options in a dependent picklist are determined by the value selected in a controlling picklist.

Need to use Field Dependency:

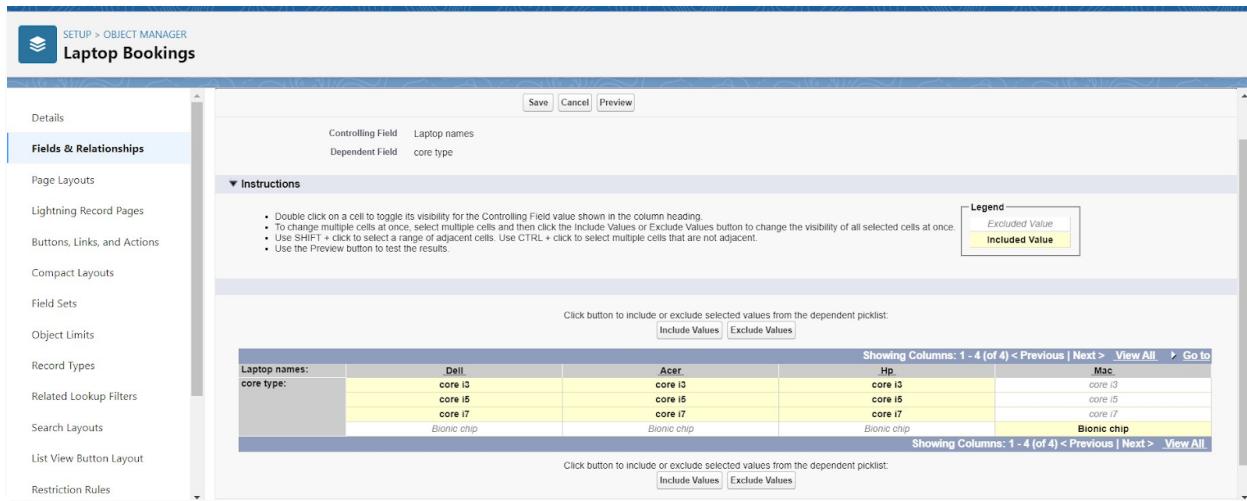
1. By using the field dependency we can get the different Values by selecting the different Picklist.

To Create a Fields & Relationship to an Laptop Booking Object

To create fields & relationship 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.click field dependency and next

3. 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.



Click save.

To Create a Fields & Relationship to an Laptop Booking Object

To create fields & relationship 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 “Lookup Relationship”
4. Click on Next
5. Click on the Related to drop down and Select the “consumer” object and click on Next
6. Fill the Above as following:
 - Change the Field Label: Name
 - Field Name :It's gets auto generated
7. Click on Next >> Next >> Save and new.

Laptop Bookings
New Relationship

Step 3. Enter the label and name for the lookup field

Field Label: name

Field Name: name

Description:

Help Text:

Child Relationship Name: Laptop_Bookings

Sharing Setting: Select the minimum access level required on the Master record to create, edit, or delete related Detail records.

- Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.
- Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.

Allow reparenting: Child records can be reparented to other parent records after they are created

To create fields in an object:

- 1.Go to setup >> click on Object Manager >> type object name(Laptop Booking) in the
- 2.search bar >> click on the object.
- 3.Now click on “Fields & Relationships” >> New
- 4.Select Data Type as a “Currency”
- 5.Click on Next

Fill the Above as following:

- Field Label: Amount
- Length: (18,0)
- Field Name :It's gets auto generated
- Click on Next >> Next >> Save and new

Step 2. Enter the details

Field Label: Amount

Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".

Length: 18

Number of digits to the left of the decimal point

Decimal Places: 0

Number of digits to the right of the decimal point

Field Name: Amount

Description:

Help Text:

Required: Always require a value in this field in order to save a record

Auto add to custom report type: Add this field to existing custom report types that contain this entity

Default Value: Show Formula Editor

To Create a Fields & Relationship 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 “Lookup Relationship”
4. Click on Next

5.

The screenshot shows the Salesforce setup interface for creating a new relationship for the 'Laptop Bookings' object. The left sidebar lists various configuration options like Details, Fields & Relationships, Page Layouts, etc. The main area is titled 'Laptop Bookings New Relationship' and 'Step 2. Choose the related object'. A dropdown menu is open under 'Related To' with 'Total laptops' selected. Navigation buttons for 'Previous', 'Next', and 'Cancel' are at the bottom right of the dialog.

6. Click on the Related to drop down and Select the “Total Laptops” object and click on Next
 - Fill the Above as following:
 - Change the Field Label: Total No Of Laptops
 - Field Name :It's gets auto generated
 - Click on Next >> Next >> Save and new.

4. To Create a Fields & Relationship to an Laptop Booking Object

To create fields & relationship to an object:

8. Go to setup >> click on Object Manager >> type object name(Laptop Booking) in the search bar >> click on the object.
9. Now click on “Fields & Relationships” >> New
10. Select Data Type as a “Email”
11. Click on Next and save it.

NOTE:- fill the records which you have created in consumer and laptop bookings and give relations also. After saving the records go to the laptop bookings object and edit lookup to master the detailed relationship.

Fields & Relationships					
FIELD LABEL		FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount		Amount__c	Currency(10, 0)		
core type		core__c	Picklist	Laptop names	
Created By		CreatedById	Lookup(User)		
Laptop Bookings Name		Name	Text(80)		✓
Laptop names		Laptop_type__c	Picklist		
Last Modified By		LastModifiedByld	Lookup(User)		
Name		Name__c	Master-Detail(consumer)		✓
Total no of laptops		Total_no_of_laptops__c	Master-Detail(Total laptops)		✓

To Create a Rollup Summary Field in “Total Laptops Object”

1. After Creating the Lookup Relationship Than Only you can create the Rollup Summary
2. Go to setup >> click on Object Manager >> type object name(Total Laptops) in the search bar >> click on the object.
3. Now click on “Fields & Relationships” >> New

Step 1. Choose the field type

Specify the type of information that the custom field will contain.

Data Type

- None Selected Select one of the data types below.
- Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
- Roll-up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
- Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
- Master-Detail Relationship Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
 - The relationship field is required on all detail records.
 - The ownership and sharing of a detail record are determined by the master record.
 - When a user deletes the master record, all detail records are deleted.
 - You can create rollup summary fields on the master record to summarize the detail records.

- 4.
5. Select Data type as a “Roll-up Summary” and Click on Next
 - Fill the Above as following:
 - Field Label: Laptops delivered
 - Field Name :It's gets auto generated

Setup > Object Manager
Total laptops

Step 2. Enter the details

Field Label: Laptops delivered
Field Name: Laptops_delivered
Description:
Help Text:

Auto add to custom report type Add this field to existing custom report types that contain this entity

- Click on Next
- 6. Select the Laptop Bookings in the Summarized Object
- 7. Select the count Radio button in the select Roll-up Type

Setup > Object Manager
Total laptops

Step 3. Define the summary calculation

Select Object to Summarize
Master Object: Total laptops
Summarized Object: Laptop Bookings
Select Roll-Up Type: COUNT

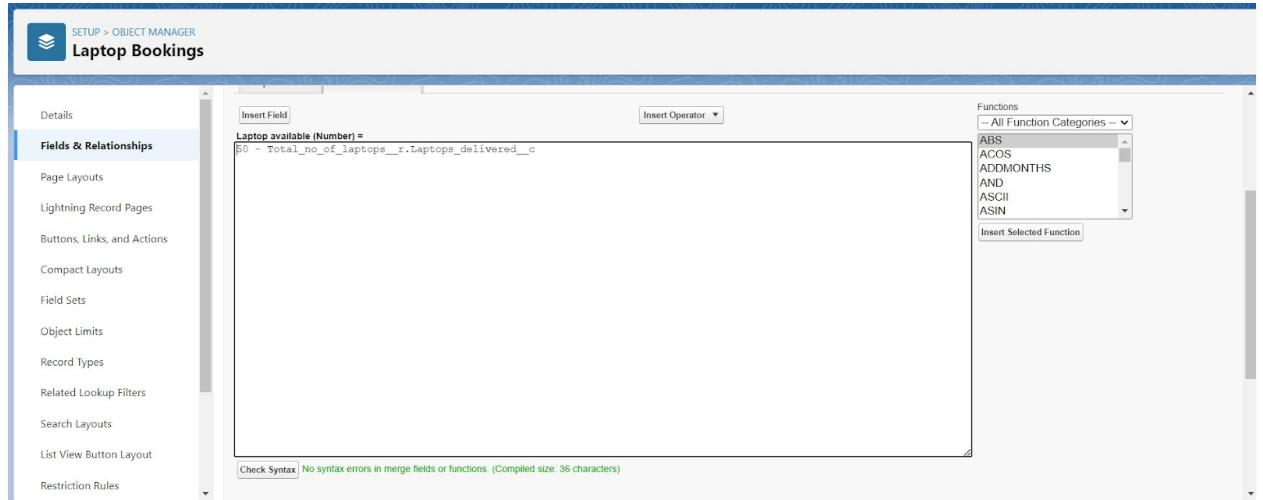
Filter Criteria
 All records should be included in the calculation
 Only records meeting certain criteria should be included in the calculation

8.

8. 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 “Formula” and Click on Next
4. Fill the Above as following:
 - Field Label: Laptops Available
 - Field Name : It's gets auto generated
 - Select the Formula Return Type as “Number”

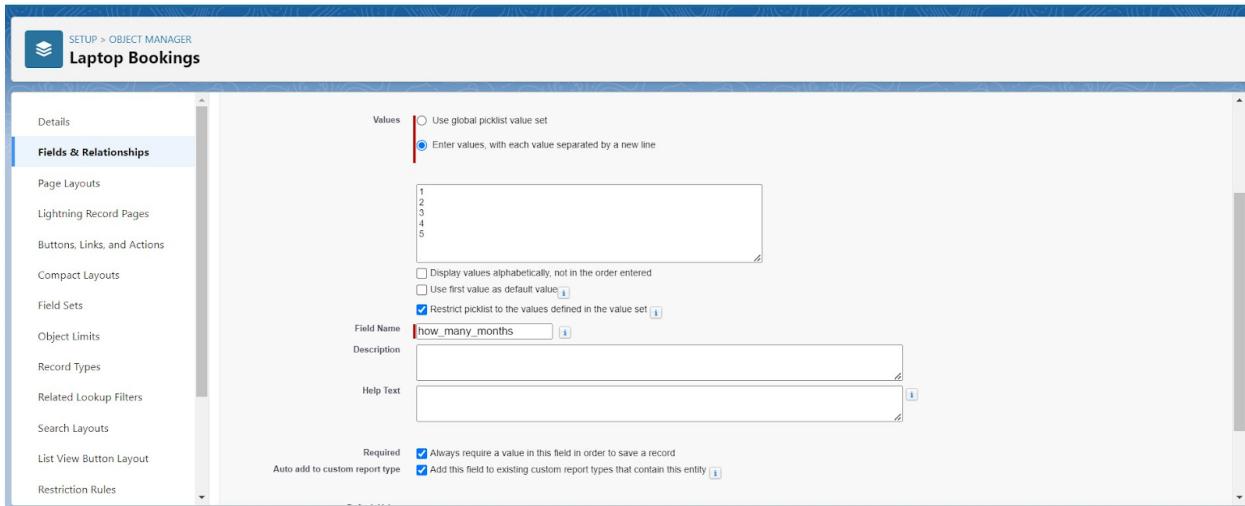
- Select the Decimal places as “0” and Click on Next
- Click on the Advanced Formula and Enter the value in formula box “ 50 - ” and Click on insert field than you will find a pop window under the Laptop Booking select the Total No Of Laptops in the second Column and select the Laptops delivered in the third column and click on insert
- “ 50 - Total_no_of_laptops__r.Laptops_delivered__c ” and Check Syntax



- Click on Next >> Next >> Save and new

To create fields in an object:

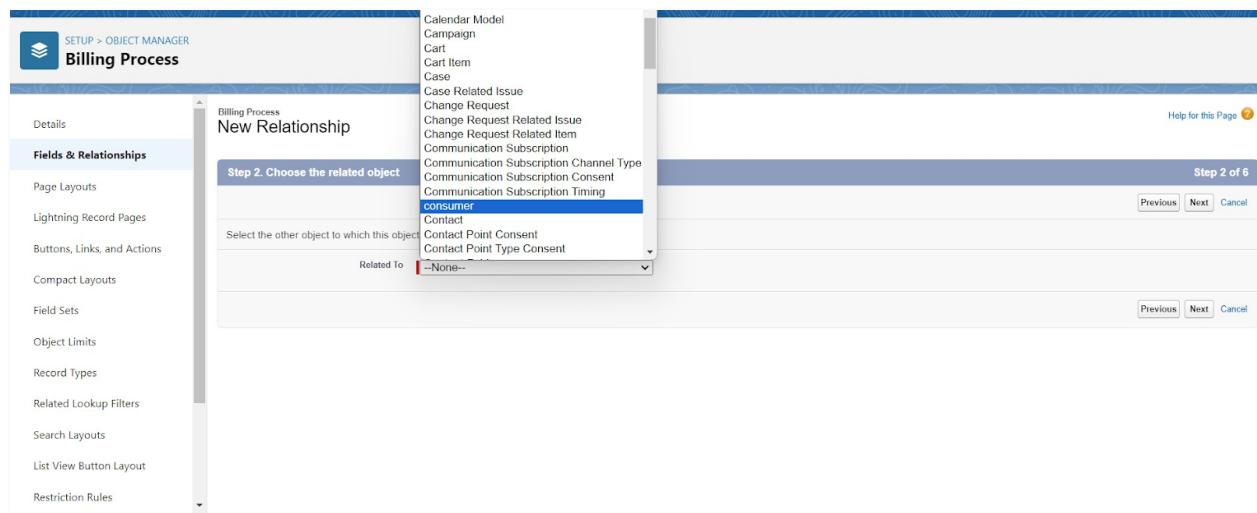
- 1.Go to setup >> click on Object Manager >> type object name(Laptop Booking) in the
- 2.search bar >> click on the object.
- 3.Now click on “Fields & Relationships” >>New
- 4.Select Data Type as a “picklist”
5. Picklist values are 1.2.3.4.5
6. Click and save it.



Creation of Fields & Relationship for Billing Process Object

1. To create fields & relationship to 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 “Master-detail Relationship”
4. Click on Next
5. Click on the Related to drop down and Select the consumer object and click on Next



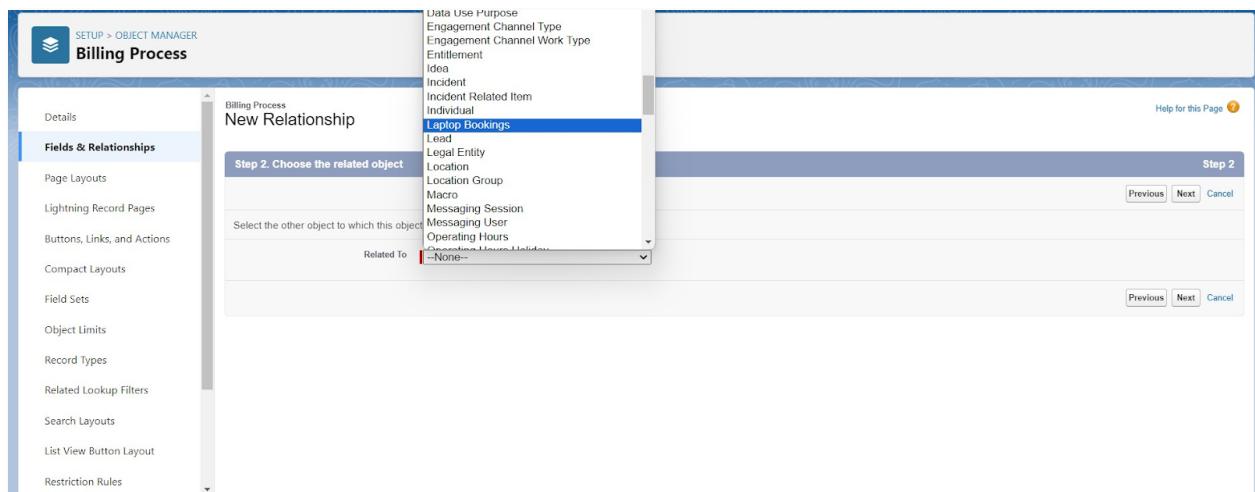
6.

7. Fill the Above as following:

- Change the Field Label: Name
- Field Name :It's gets auto generated
- Click on Next >> Next >> Save and new.

2. To create another fields & relationship to 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 “Lookup Relationship”
4. Click on Next
5. Click on the Related to drop down and Select the Laptop Booking object and click on Next



6.

7. Fill the Above as following:

- Change the Field Label: Laptop Booking
- Field Name :It's gets auto generated
- Click on Next >> Next >>Save and new.

3. 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
1. Cash
 2. Check
 3. Credit card
 4. Debit card
 5. UPI
 6. Phonepe
 7. Gpay
 8. Paytm
- Select required
 - Click on Next >> Next >> Save and new.

Cross Object Formula Field:

In Salesforce, a cross-object formula field allows you to create a formula that references fields from related objects. It enables you to perform calculations or display data from related records without the need for custom code or complex workflows.

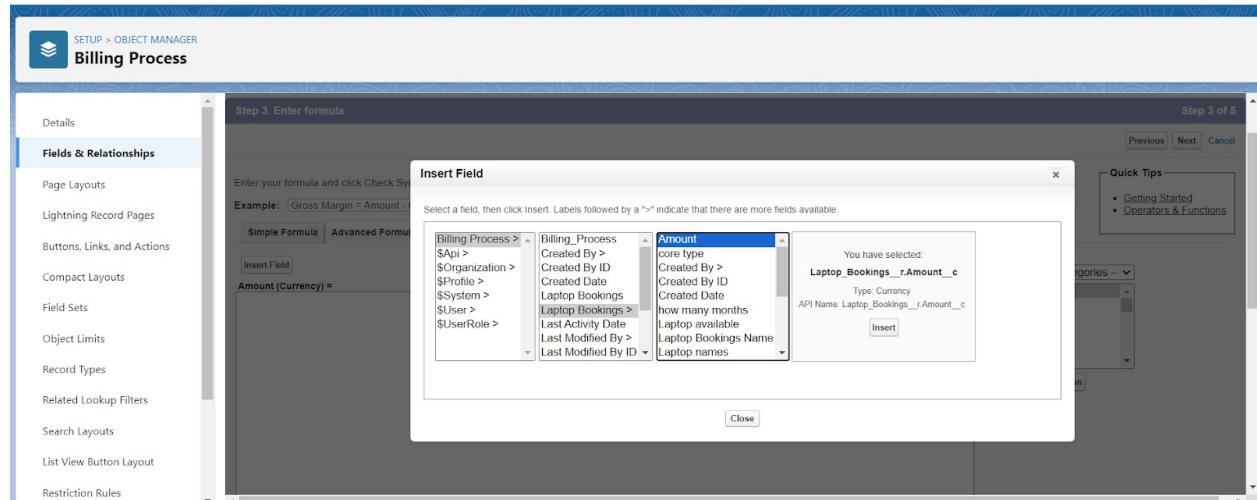
Why do we need to create the Cross Object Formula Field:

If we want to get the Particular field from another object in that case we will use the Cross object Formula field. For that First we need to create the relationship b/w two objects and relate the field with formula data type.

4. Create a Cross object formula Field in billing process Object

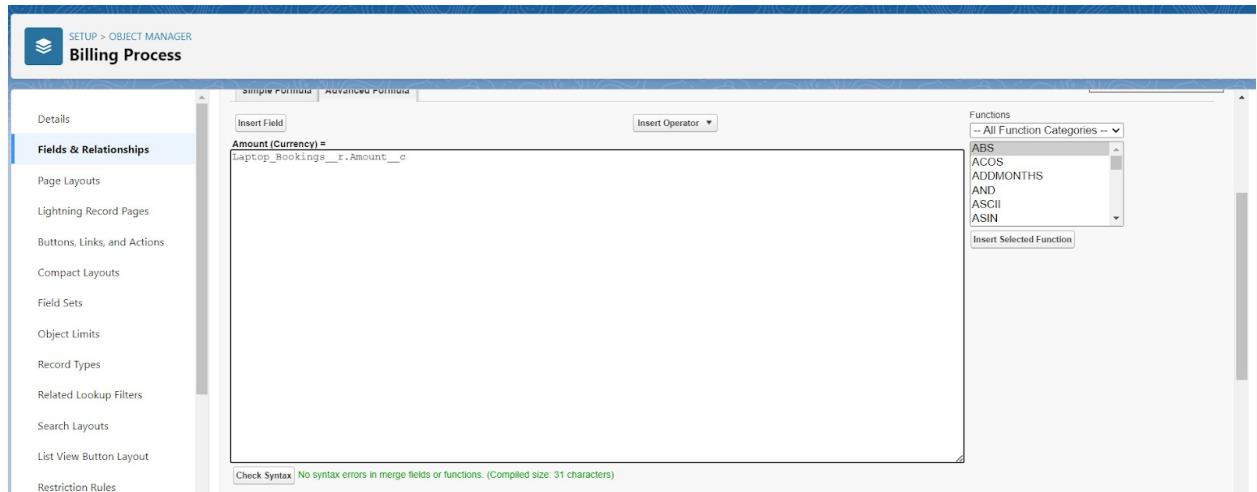
1. Go to setup >> click on Object Manager >> type object name(Billing Process) in the search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data Type as a “Formula”
4. Click on Next
5. Enter the Field label: Amount, the Field name gets auto generated and click on 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



9.

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



11.

Creating the field in Total Laptops object

1. To create fields in an 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”

SETUP > OBJECT MANAGER
Total laptops

Field Label: Laptops Available
Field Name: Laptops_Available

Formula Return Type: Number
Value: 50

8.

9. Select the Decimal places as "0" and Click on Next

Note: I am Considering “Total No Of Laptops = 50” While creating a new record in Total Laptops Object.

1. Click on the Advanced
2. Formula “ 50 - Laptops_delivered__c ” and Check Syntax

SETUP > OBJECT MANAGER
Total laptops

Simple Formula | Advanced Formula

Insert Field: Laptops Available (Number) =
50 - Laptops_delivered__c

Insert Operator:

Functions: ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN

Check Syntax: No syntax errors in merge fields or functions. (Compiled size: 36 characters)

3.

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

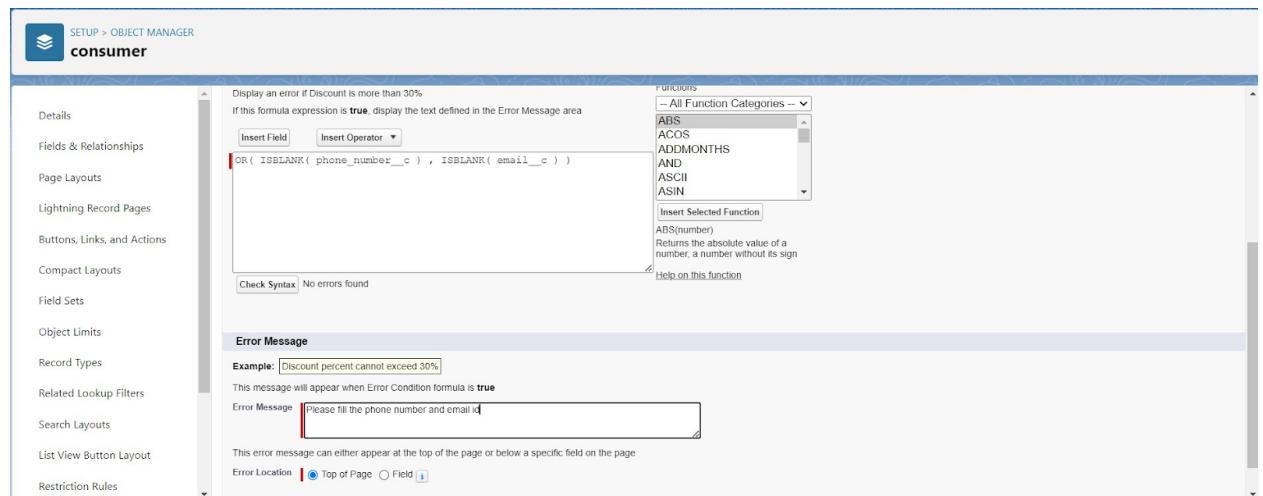
Validation rule

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 phone number field in consumer object

1. Go to the setup page - click on object manager - From 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.

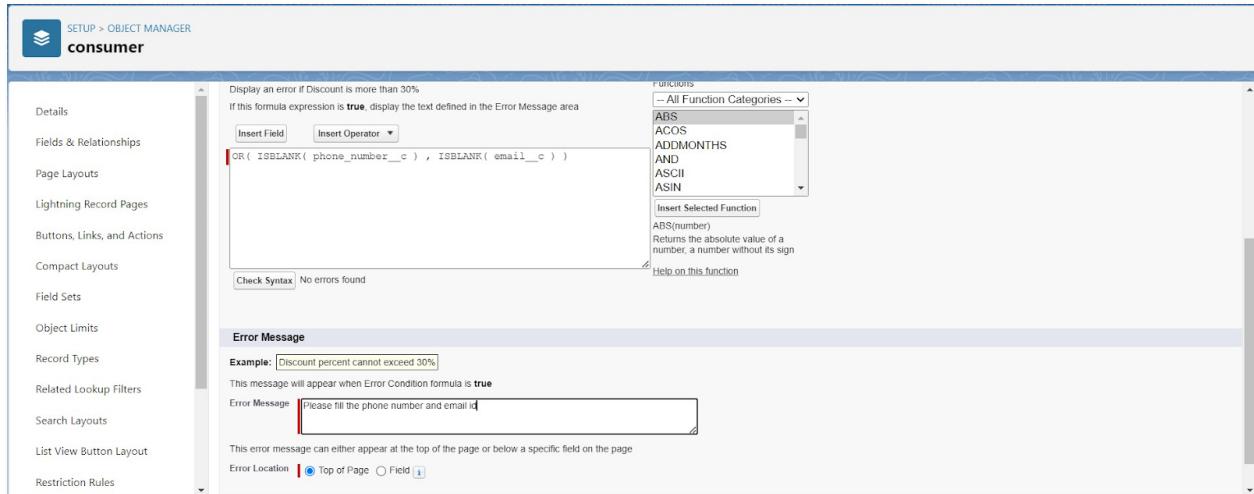


- 6.
7. Save the validation rule.

Creating the validation rule for phone number field in consumer object

Creating the validation rule for phone number field in consumer object

1. Go to the setup page >> click on object manager >> From 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.
7. Save the validation rule.

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, Visualforce 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 with 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 Salesforce Setup interface under the 'Profiles' section. At the top, there's a message about permissions and record types. Below that, the 'Profile Detail' section shows the profile has been cloned from 'Salesforce'. The 'Page Layouts' section lists various standard object layouts for different objects like Global, Email Application, Home Page Layout, Account, Alternative Payment Method, and Appointment Invitation. Each layout is associated with a specific global or object-specific layout.

Object	Layout Type	Description
Global	Global Layout	[View Assignment]
Email Application	Not Assigned	[View Assignment]
Home Page Layout	DE Default	[View Assignment]
Account	Account Layout	[View Assignment]
Alternative Payment Method	Alternative Payment Method Layout	[View Assignment]
Appointment Invitation	Appointment Invitation Layout	[View Assignment]

2.

3. 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.

SETUP Profiles

Individuals	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>																												
Invoices	<input type="checkbox"/>																																	
Leads	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>																												
Custom Object Permissions																																		
<table border="1"> <thead> <tr> <th></th> <th colspan="5">Basic Access</th> <th>Data Administration</th> </tr> <tr> <th></th> <th>Read</th> <th>Create</th> <th>Edit</th> <th>Delete</th> <th>View All</th> <th>Modify All</th> </tr> </thead> <tbody> <tr> <td>Billing Process</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>consumers</td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> </tr> </tbody> </table>								Basic Access					Data Administration		Read	Create	Edit	Delete	View All	Modify All	Billing Process	<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"/>					
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consumers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>																												
Session Settings																																		
Session Times Out After	2 hours of inactivity					<input type="button" value="i"/>																												
Session Security Level Required at Login	--None--					<input type="button" value="i"/>																												
Password Policies																																		

- 3.
4. Give Access and Save it.

Agent Profile

1. Go to setup >> type profiles in 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.

SETUP Profiles

Contact Point Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>																												
Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>																												
Custom Object Permissions																																		
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Session Settings																																		
Session Times Out After	2 hours of inactivity					<input type="button" value="i"/>																												
Session Security Level Required at Login	--None--					<input type="button" value="i"/>																												
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																																	

- 4.
5. Give access and save it.

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

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.

```
graph TD; NE[Nick Enterprises] --> CFO[CFO]; NE --> HR[HR]; NE --> Manager[Manager]; NE --> OS[On Site Emp]; NE --> RE[Remote Emp]; CFO --> CEO[CEO]; Manager --> AddRole1[Add Role]; HR --> AddRole2[Add Role]; Manager --> AddRole3[Add Role]; OnSiteEmp[On Site Emp] --> AddRole4[Add Role]; RemoteEmp[Remote Emp] --> AddRole5[Add Role]
```

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

Role Edit	Save	Save & New	Cancel
Label	owner		
Role Name	owner		
This role reports to	CEO		
Role Name as displayed on reports			

2.

- Click and save it.

Activity 2: Creating Agent roles

Creating another two roles under manager

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

The screenshot shows the 'Your Organization's Role Hierarchy' section. At the top, there are buttons for 'Collapse All' and 'Expand All'. Below this, the hierarchy is listed:

- smartbridge** (parent)
 - CEO** (child)
 - CFO** (child)
 - COO** (child)
 - HR** (child)
 - owner** (child)
 - SVP.Customer Service & Support** (child)
 - SVP.Human Resources** (child)
 - SVP.Sales & Marketing** (child)

Each role item includes 'Edit | Del | Assign' buttons and an 'Add Role' link. A 'Show in tree view' dropdown is visible at the top right. A 'Help for this Page' link is also present.

3.

- 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

- Go to setup - type users in quick find box - select users -click New user.

2. Fill in the fields
3. First Name : vicky
4. Last Name : y
5. Alias : Give a 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.

The screenshot shows the Salesforce 'User Edit' interface. At the top, there's a header with 'SETUP' and 'Users'. Below it, a sub-header says 'New User'. The main area is titled 'User Edit' with buttons for 'Save', 'Save & New', and 'Cancel'. A note indicates that certain fields are required. The 'General Information' section contains fields for First Name ('vicky'), Last Name ('rushi'), Alias ('vrush'), Email ('udayrushi00@gmail.com'), Username ('udayrushi00@456789@gmail'), Nickname ('vicky'), Title, Company, Department, and Division. To the right, under 'Role', 'owner' is selected. Under 'User License', 'Salesforce' is chosen. Under 'Profile', 'Standard User' is selected. The 'Active' checkbox is checked. Other user type checkboxes like 'Marketing User', 'Offline User', etc., are unselected. At the bottom, there are dropdowns for 'Data.com User Type' (set to '--None--') and 'Data.com Monthly Addition Limit' (set to 'Default Limit (300)').

Save it.

Activity 2: creating another users

1. Go to setup -type users in quick find box - select users -click New user.
2. Fill in the fields
3. First Name : ram
4. Last Name : ram
5. Alias : Give a 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.

The screenshot shows the 'User Edit' screen for creating a new user. In the 'General Information' section, fields include First Name (ram), Last Name (ramesh), Alias (rrame), Email (udayrushi@gmail.com), Username (udayrushi@0145gmail.com), Nickname (ram), Title (empty), Company (empty), Department (empty), and Division (empty). On the right, under 'Profile', 'Standard Platform User' is selected. Other profile options like 'Marketing User', 'Offline User', etc., are shown with checkboxes. A note at the bottom indicates 'I = Required Information'.

12.

13. 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.

Autolaunched 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.

Scheduled Flows: These are flows that you can schedule to run at specific times or intervals. They are often used for automating recurring tasks.

Flow Elements: Flow Builder offers various elements that you can use to create flows, such as variables, decisions, loops, and more. These elements allow you to build sophisticated logic into your flows.

Subflows: Subflows are reusable flow elements that you can incorporate into multiple flows, making it easier to manage and maintain complex processes.

Record-Triggered Flows: These are flows that are triggered when records meet specified criteria. They are often used for automating record updates and related actions.

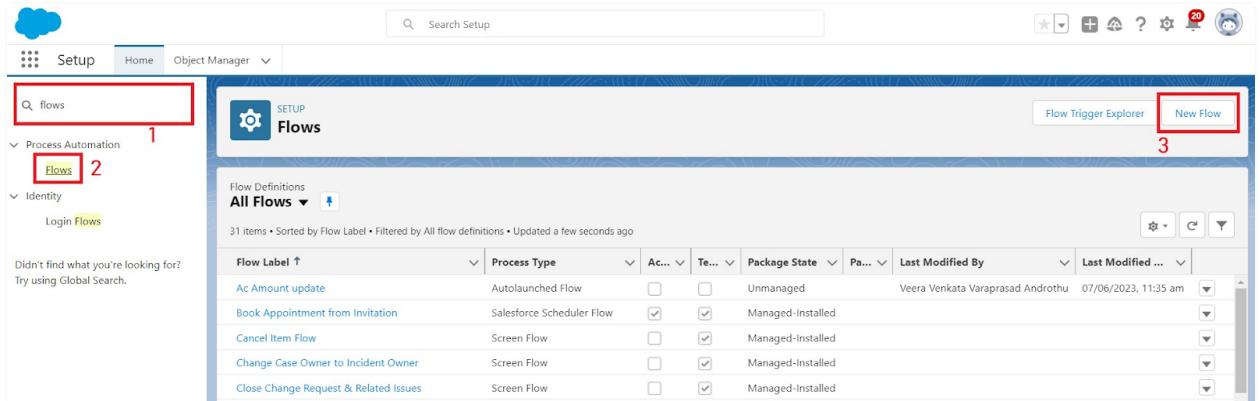
Why do we need to create a flow:

To get the Amount Field automatic by the selection of laptop types the Amount is generated Automatically in the amount field.

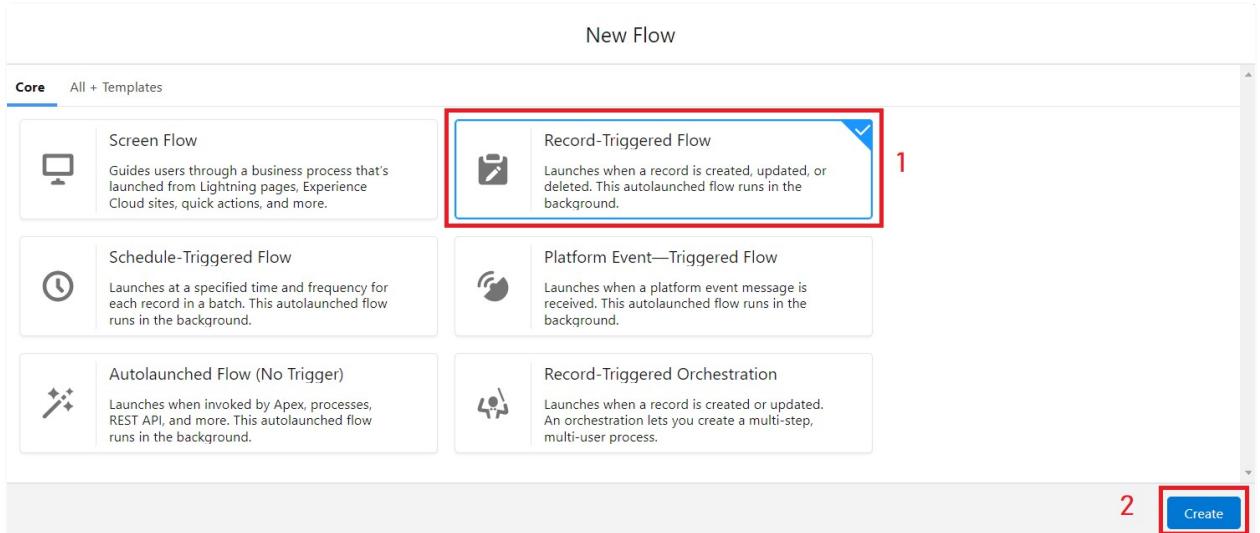
Create a Flow on dell laptop

Activity -

1. Go to setup >>type Flow in quick find box >> Click on the Flow and Select the New Flow.



2. Select the Record-triggered flow and Click on Create.



3. Select the Object as a Laptop Booking in the Drop down list.
4. Select the Trigger Flow when: "A record is Created or Updated".
5. Select the Optimize the flow for: "Actions and Related Records" and Click on Done.

Configure Start

Select Object

Select the object whose records trigger the flow when they're created, updated, or deleted.

* Object
Laptop Bookings

Configure Trigger

* Trigger the Flow When:

- A record is created
- A record is updated
- A record is created or updated
- A record is deleted

Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Cancel Done

Configure Start

Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements
None

* Optimize the Flow for:

Fast Field Updates

Update fields on the record that triggers the flow to run. This high-performance flow runs *before* the record is saved to the database.

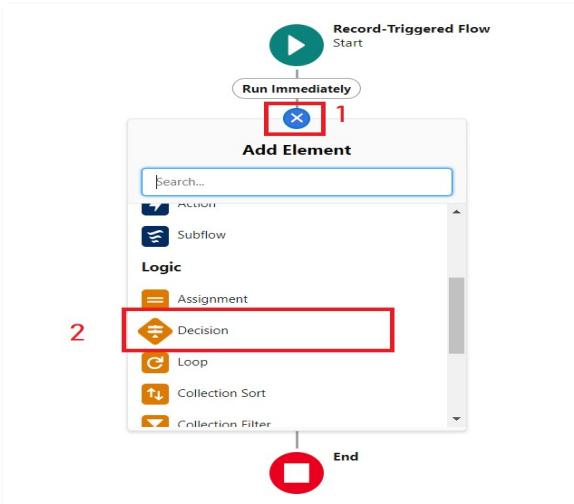
Actions and Related Records

Update any record and perform actions, like send an email. This more flexible flow runs *after* the record is saved to the database.

Include a Run Asynchronously path to access an external system after the original transaction for the triggering record is successfully committed

Cancel Done

6. Under the Record-triggered Flow Click on "+" Symbol and In the Drop down List select the "Decision Element".



7. Enter the Details Label: Field should be Update, API name: Gets Automatically Generated.
8. Enter the Outcome Details Label: dell , Outcome API name: Gets Automatically Generated.
 - Resource: Select Record.Laptop booking__c.
 - Operator: Select Equals.
 - Value: Select dell
 - Add the same outcome order to acer , hp,mac.
 - Click done.

Edit Decision

*Label	* API Name
field should updated	field_should_updated

Description

the field should be automatically updated

Outcomes For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

OUTCOME ORDER	OUTCOME DETAILS	Actions
dell	*Label: dell *Outcome API Name: dell Condition Requirements to Execute Outcome: All Conditions Are Met (AND) Resource: \$Record > Laptop names Operator: Equals Value: Dell	Delete Outcome
acer		
hp		
mac		
false		

9. Go to flow page
11. Beside dell there is a symbol '+' click on that.

12. Again select decision

13. Enter the Details Label: Field should Update(any one u want), API name: Gets Automatically Generated.

14. select the Outcome Details Label: dell core i3 , Outcome API name: Gets Automatically Generated.

- Resource: Select Record.core type.
- Operator: Select Equals.
- Value: Select core i3.
- Then again click the symbol '+' outcome details

15. select the Outcome '+' Details Label: dell core i5 , Outcome API name: Gets Automatically Generated.

- Resource: Select Record.core type.
- Operator: Select Equals.
- Value: Select core i5.
- Then again click the symbol '+' outcome details

16. Enter the Outcome Details Label: dell core i7 , Outcome API name: Gets Automatically Generated.

- Resource: Select Record.core type.
- Operator: Select Equals.
- Value: Select core i7.

17. Click done.

18.

19. So go to the flow page select '+' after core i3 then again select the decision.

The screenshot shows the 'Edit Decision' dialog with the following details:

- Outcomes:** dell core i3, dell core i5, dell core i7
- Condition Requirements to Execute Outcome:** All Conditions Are Met (AND)
- Outcome Details (dell core i3):**
 - Label:** dell core i3
 - API Name:** dellcore_i3
 - Resource:** \$Record > core type X
 - Operator:** Equals
 - Value:** core i3
- Outcome Details (dell core i5):**
 - Label:** dell core i5
 - API Name:** dellcore_i5
- Outcome Details (dell core i7):**
 - Label:** dell core i7
 - API Name:** dellcore_i7

20. Enter the Details Label: months selected , API name: Gets Automatically Generated.
21. Enter the Outcome Details Label: dell 1(i3) , Outcome API name: Gets Automatically Generated.
- 22.
- Resource: Select Record.how many months.
 - Operator: Select Equals.
 - Value: 1.
23. Enter the Outcome Details Label: dell 2(i3) , Outcome API name: Gets Automatically Generated.
- Resource: Select Record.how many months.
 - Operator: Select Equals.
 - Value: Select 2..
24. Click '+' outcome details
25. Enter the Outcome Details Label: dell 3(i3) , Outcome API name: Gets Automatically Generated.
- Resource: Select Record.how many months.
 - Operator: Select Equals.
 - Value: Select 3..
26. Click '+' outcome details
27. Enter the Outcome Details Label: dell 4(i3) , Outcome API name: Gets Automatically Generated.
- Resource: Select Record.how many months.
 - Operator: Select Equals.
 - Value: Select 4..
28. Click '+' outcome details
29. Enter the Outcome Details Label: dell 5(i3) , Outcome API name: Gets Automatically Generated.
- Resource: Select Record.how many months.
 - Operator: Select Equals.
 - Value: Select 4.

Edit Decision

* Label	* API Name																		
months selected	months_selected																		
Description																			
<p>Outcomes For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.</p> <table border="1"> <thead> <tr> <th>OUTCOME ORDER</th> <th>OUTCOME DETAILS</th> <th>Delete Outcome</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>* Label 1 * Outcome API Name X1</td> <td></td> </tr> <tr> <td>2</td> <td>Condition Requirements to Execute Outcome All Conditions Are Met (AND)</td> <td></td> </tr> <tr> <td>3</td> <td>Resource \$Record > how many months</td> <td>Operator Equals Value 1</td> </tr> <tr> <td>4</td> <td></td> <td></td> </tr> <tr> <td>5</td> <td></td> <td></td> </tr> </tbody> </table>		OUTCOME ORDER	OUTCOME DETAILS	Delete Outcome	1	* Label 1 * Outcome API Name X1		2	Condition Requirements to Execute Outcome All Conditions Are Met (AND)		3	Resource \$Record > how many months	Operator Equals Value 1	4			5		
OUTCOME ORDER	OUTCOME DETAILS	Delete Outcome																	
1	* Label 1 * Outcome API Name X1																		
2	Condition Requirements to Execute Outcome All Conditions Are Met (AND)																		
3	Resource \$Record > how many months	Operator Equals Value 1																	
4																			
5																			

Cancel Done

- 30.
31. Follow the above picture you will understand.
32. After dell 1(i3) there is '+' symbol like dell 2(i3),dell 3(i3),dell 4(i3),dell 5(i3).
33. Click on '+' then select update records
34. Enter the Details Label: one month of dell i3 rate , API name: Gets Automatically Generated.
35. Field:- Amount_c , value:- for dell 1(i3)-1000, dell 2(i3)-2000, dell 3(i3)-3000, dell 4(i3)-4000, dell 5(i3)-5000. Follow for all these finally
36. Click done.

37. Enter the Details Label: months selected , API name: Gets Automatically Generated.
38. Enter the Outcome Details Label: dell 1(i7) , Outcome API name: Gets Automatically Generated.
39.
 - Resource: Select Record.how many months.
 - Operator: Select Equals.
 - Value: 1.
40. Enter the Outcome Details Label: dell 2(i7) , Outcome API name: Gets Automatically Generated.
 - Resource: Select Record.how many months.

- Operator: Select Equals.

- Value: Select 2..

41. Click '+' outcome details

42. Enter the Outcome Details Label: dell 3(i7) , Outcome API name: Gets Automatically Generated.

- Resource: Select Record.how many months.
- Operator: Select Equals.
- Value: Select 3..

43. Click '+' outcome details

44. Enter the Outcome Details Label: dell 4(i7) , Outcome API name: Gets Automatically Generated.

- Resource: Select Record.how many months.
- Operator: Select Equals.
- Value: Select 4.

45. Click '+' outcome details

46. Enter the Outcome Details Label: dell 5(i7) , Outcome API name: Gets Automatically Generated.

- Resource: Select Record.how many months.
- Operator: Select Equals.
- Value: Select 5.

The screenshot shows the 'Edit Decision' interface with the following details:

- Label:** months selected
- API Name:** months_selected
- Description:** (empty)
- Outcomes:** For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.
- OUTCOME ORDER:** 1
- OUTCOME DETAILS:**
 - Label:** 1
 - Outcome API Name:** X1
 - Condition Requirements to Execute Outcome:** All Conditions Are Met (AND)
 - Resource:** \$Record > how many months
 - Operator:** Equals
 - Value:** 1
- Buttons:** Delete Outcome, Cancel, Done

47.

48. Follow the above picture you will understand.

49. After dell 1(i7) there is '+' symbol like dell 2(i7),dell 3(i7),dell 4(i7),dell 5(i7).

50. Click on '+' then select update records

51. Enter the Details Label: one month of dell i5 rate , API name: Gets Automatically Generated.
52. Field:- Amount_c , value:- for dell 1(i7)-2000, dell 2(i7)-4000, dell 3(i7)-6000, dell 4(i7)-8000, dell 5(i7)-10000. Follow for all these finally
53. Click done.

creating flow on acer laptop

1. Go to flow page
2. Beside acer there is a symbol '+' click on that.
3. Again select decision
4. Enter the Details Label: Field is Update, API name: Gets Automatically Generated.
5. select the Outcome Details Label: acer core i3 , Outcome API name: Gets Automatically Generated.
- Resource: Select Record.core type.
- Operator: Select Equals.
- Value: Select core i3.

The screenshot shows the 'Edit Decision' dialog box. At the top, it says 'Edit Decision'. Below that, under 'Outcomes', it says 'For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.' There is a table with two columns: 'OUTCOME ORDER' and 'OUTCOME DETAILS'. In the 'OUTCOME ORDER' column, there are three rows: 'acer core i3', 'acer core i5', and 'acer core i7'. In the 'OUTCOME DETAILS' column, for 'acer core i3', the 'Label' is 'acer core i3' and the 'Outcome API Name' is 'acer_core_i3'. Under 'Condition Requirements to Execute Outcome', it says 'All Conditions Are Met (AND)'. Below this, under 'Default Outcome', there is a table with three columns: 'Resource', 'Operator', and 'Value'. The 'Resource' column has '\$Record > core type', the 'Operator' column has 'Equals', and the 'Value' column has 'core i3'. There is a button '+ Add Condition' below this table. At the bottom, there is a section 'When to Execute Outcome' with two radio buttons: 'If the condition requirements are met' (which is selected) and 'Only if the record that triggered the flow to run is updated to meet the condition requirements'. At the very bottom right, there are 'Cancel' and 'Done' buttons.

Click done.

6. Go to flow page
7. Beside dell there is a symbol '+' click on that.

8. Again select decision
9. Enter the Details Label: months selected , API name: Gets Automatically Generated.
10. Enter the Outcome Details Label: acer 1(i3) , Outcome API name: Gets Automatically Generated.
11.
 - Resource: Select Record.how many months.
 - Operator: Select Equals.
 - Value: 1.
12. Enter the Outcome Details Label: acer 2(i3) , Outcome API name: Gets Automatically Generated.
 - Resource: Select Record.how many months.
 - Operator: Select Equals.
 - Value: Select 2..
13. Click '+' outcome details
14. Enter the Outcome Details Label: acer 3(i3) , Outcome API name: Gets Automatically Generated.
 - Resource: Select Record.how many months.
 - Operator: Select Equals.
 - Value: Select 3..
15. Click '+' outcome details
16. Enter the Outcome Details Label: acer 4(i3) , Outcome API name: Gets Automatically Generated.
 - Resource: Select Record.how many months.
 - Operator: Select Equals.
 - Value: Select 4.
17. Click '+' outcome details
18. Enter the Outcome Details Label: acer 5(i3) , Outcome API name: Gets Automatically Generated.
 - Resource: Select Record.how many months.
 - Operator: Select Equals.
 - Value: Select

Edit Decision

* Label acer months selected	* API Name acer_months_selected	
Description 		
Outcomes For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.		
OUTCOME ORDER 1 + <ul style="list-style-type: none"> acer 1(i3) acer 2(i3) acer 3(i3) acer 4(i3) acer 5(i3) 	OUTCOME DETAILS <div style="display: flex; justify-content: space-between; align-items: flex-start;"> <div style="flex: 1;"> <p>* Label acer 1(i3)</p> <p>Condition Requirements to Execute Outcome All Conditions Are Met (AND)</p> </div> <div style="flex: 1;"> <p>* API Name acer_1_i3</p> </div> </div> <div style="margin-top: 10px;"> <p>Resource \$Record > how many months</p> <p>Operator Equals</p> <p>Value 1</p> </div>	
		Delete Outcome
Cancel Done		

Click done.

19. After acer 1(i3) there is '+' symbol like acer 2(i3),acer 3(i3),acer 4(i3),acer 5(i3).
20. Click on '+' then select update records
21. Enter the Details Label: one month of acer i3 rate , API name: Gets Automatically Generated.
22. Field:- Amount__c , value:- for acer 1(i3)-900, acer 2(i3)-1800, acer 3(i3)-2700, acer 4(i3)-3600, acer 5(i3)-4800. Follow for all these finally

Edit Update Records

one month of acer i3 rate (one_month_of_acer_i3_rate) [edit]

*** How to Find Records to Update and Set Their Values**

Use the laptop bookings record that triggered the flow
 Update records related to the laptop bookings record that triggered the flow
 Use the IDs and all field values from a record or record collection
 Specify conditions to identify records, and set fields individually

Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record ▾

Set Field Values for the Laptop Bookings Record

Field	Value
Amount__c	900

+ Add Field

Cancel Done

23.

24. Click done.

creating a flow on hp laptop

1. Go to flow page
2. Beside hp there is a symbol '+' click on that.
3. Again select decision
4. Enter the Details Label: Field is Update, API name: Gets Automatically Generated.
5. select the Outcome Details Label: hp core i5 , Outcome API name: Gets Automatically Generated.
- Resource: Select Record.core type.
- Operator: Select Equals.
- Value: Select hp i5.

6. Go to flow page
7. Beside hp there is a symbol '+' click on that.
8. Again select decision
9. Enter the Details Label: hp field should be updated , API name: Gets Automatically Generated.
10. Enter the Outcome Details Label: hp 1(i5) , Outcome API name: Gets Automatically Generated.
11.
 - Resource: Select Record.how many months.
 - Operator: Select Equals.
 - Value: 1.
12. Enter the Outcome Details Label: hp 2(i5) , Outcome API name: Gets Automatically Generated.
 - Resource: Select Record.how many months.
 - Operator: Select Equals.
 - Value: Select 2..
13. Click '+' outcome details
14. Enter the Outcome Details Label: hp 3(i5) , Outcome API name: Gets Automatically Generated.
 - Resource: Select Record.how many months.
 - Operator: Select Equals.
 - Value: Select 3..
15. Click '+' outcome details
16. Enter the Outcome Details Label: hp 4(i5) , Outcome API name: Gets Automatically Generated.
 - Resource: Select Record.how many months.
 - Operator: Select Equals.
 - Value: Select 4.
17. Click '+' outcome details
18. Enter the Outcome Details Label: hp 5(i5) , Outcome API name: Gets Automatically Generated.
 - Resource: Select Record.how many months.
 - Operator: Select Equals.

- Value: Select 5.

Edit Decision

Outcomes For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

OUTCOME ORDER ⓘ +	OUTCOME DETAILS	Delete Outcome
hp core i3	*Label hp core i5	*Outcome API Name hp_core_i5
hp core i5	Condition Requirements to Execute Outcome All Conditions Are Met (AND)	
hp core i7		
Default Outcome	Resource: \$Record > core type Operator: Equals Value: core i5 + Add Condition	
	When to Execute Outcome ⓘ <input checked="" type="radio"/> If the condition requirements are met <input type="radio"/> Only if the record that triggered the flow to run is updated to meet the condition requirements	
	Cancel Done	

Click on done.

19. After hp 1(i5) there is '+' symbol like hp 2(i5), hp 3(i5), hp 4(i5), hp 5(i5).
20. Click on '+' then select update records
21. Enter the Details Label: one month of hp i5 rate , API name: Gets Automatically Generated.
22. Field:- Amount__c , value:- for hp 1(i5)-1700, hp 2(i5)-3400, hp 3(i5)-5100, hp 4(i5)-6800, hp 5(i5)-8500. Follow for all these finally

Edit Update Records

one month of hp i5 rate (one_month_of_hp_i5_rate) 

*** How to Find Records to Update and Set Their Values**

- Use the laptop bookings record that triggered the flow
- Update records related to the laptop bookings record that triggered the flow
- Use the IDs and all field values from a record or record collection
- Specify conditions to identify records, and set fields individually

Set Filter Conditions

Condition Requirements to Update Record

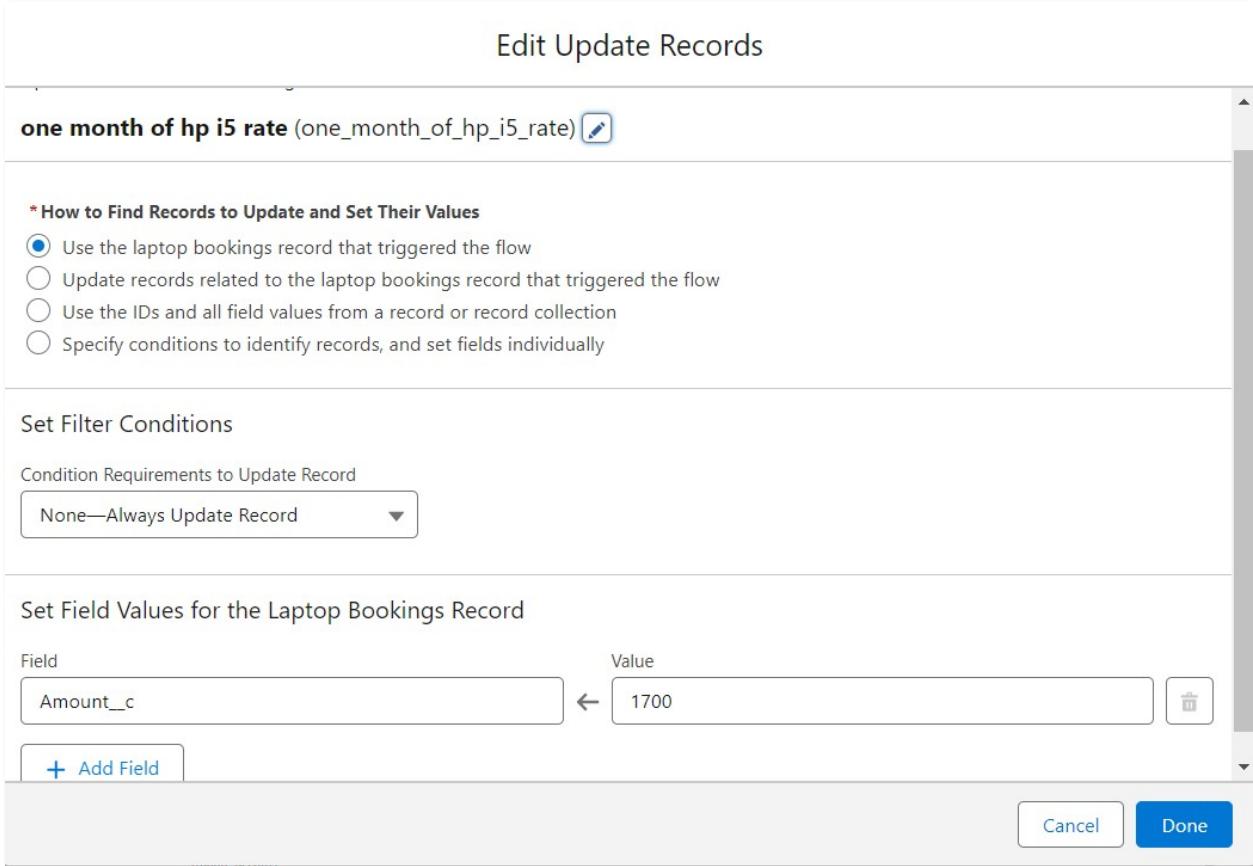
None—Always Update Record ▾

Set Field Values for the Laptop Bookings Record

Field	Value
Amount_c	← 1700 

+ Add Field

Cancel Done



Click done.

creating a flow on mac laptop

1. Go to flow page
2. Beside mac there is a symbol '+' click on that.
3. Again select decision
4. Enter the Details Label: mac should be Updated, API name: Gets Automatically Generated.
5. select the Outcome Details Label: mac laptop , Outcome API name: Gets Automatically Generated.
- Resource: Select Record.core type.
- Operator: Select Equals.
- Value: Select Bionic Chip.

Edit Decision

*Label mac field should be updated	*API Name mac_field_should_be_updated										
Description 											
Outcomes For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.											
OUTCOME ORDER i + mac laptop	OUTCOME DETAILS <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; padding: 5px;">*Label mac laptop</td> <td style="width: 50%; padding: 5px;">*Outcome API Name mac_laptop</td> </tr> <tr> <td colspan="2" style="padding: 5px;">Condition Requirements to Execute Outcome All Conditions Are Met (AND)</td> </tr> <tr> <td style="padding: 5px;">Resource \$Record > core type</td> <td style="padding: 5px;">Operator Equals</td> <td style="padding: 5px;">Value Bionic chip</td> </tr> <tr> <td colspan="3" style="padding: 5px; text-align: right;">+ Add Condition</td> </tr> </table>	*Label mac laptop	*Outcome API Name mac_laptop	Condition Requirements to Execute Outcome All Conditions Are Met (AND)		Resource \$Record > core type	Operator Equals	Value Bionic chip	+ Add Condition		
*Label mac laptop	*Outcome API Name mac_laptop										
Condition Requirements to Execute Outcome All Conditions Are Met (AND)											
Resource \$Record > core type	Operator Equals	Value Bionic chip									
+ Add Condition											
Cancel Done											

Click done.

6. Go to flow page
7. Beside Mac there is a symbol '+' click on that.
8. Again select decision
9. Enter the Details Label: Mac months selected , API name: Gets Automatically Generated.
10. Enter the Outcome Details Label: mac bionic chip(1) , Outcome API name: Gets Automatically Generated.
11.
 - Resource: Select Record.how many months.
 - Operator: Select Equals.
 - Value: 1.
12. Enter the Outcome Details Label: mac bionic chip(1) , Outcome API name: Gets Automatically Generated.
 - Resource: Select Record.how many months.
 - Operator: Select Equals.
 - Value: Select 2..
13. Click '+' outcome details
14. Enter the Outcome Details Label: mac bionic chip(1) , Outcome API name: Gets

Automatically Generated.

- Resource: Select Record.how many months.
- Operator: Select Equals.
- Value: Select 3..

15. Click '+' outcome details

16. Enter the Outcome Details Label: mac bionic chip(1) , Outcome API name: Gets Automatically Generated.

- Resource: Select Record.how many months.
- Operator: Select Equals.
- Value: Select 4.

17. Click '+' outcome details

18. Enter the Outcome Details Label: mac bionic chip(1) , Outcome API name: Gets Automatically Generated.

- Resource: Select Record.how many months.
- Operator: Select Equals.
- Value:

Select

5.

Edit Decision

The screenshot shows the 'Edit Decision' dialog box with five outcome details listed. Each outcome has a label, an outcome API name, condition requirements, a resource, an operator, a value, and a 'When to Execute Outcome' section. The outcomes are:

Outcome Order	Label	Outcome API Name	Condition Requirements to Execute Outcome	Resource	Operator	Value
mac bionic chip(1)	mac bionic chip(1)	mac_bionic_chip_1	All Conditions Are Met (AND)	\$Record > how many months	Equals	1
mac bionic chip(2)						
mac bionic chip(3)						
mac bionic chip(4)						
mac bionic chip(5)						

At the bottom, there are 'Cancel' and 'Done' buttons.

Click done.

19. After mac bionic chip(1) there is '+' symbol like mac bionic chip(2), mac bionic chip(3), mac bionic chip(4),mac bionic chip(5).

20. Click on '+' then select update records

21. Enter the Details Label: one month of mac rate , API name: Gets Automatically

Generated.

22. Field:- Amount__c , value:- for one month of mac bionic chip rate-1700, two month of mac bionic chip rate-3400, three month of mac bionic chip rate-5100, four month of mac bionic chip rate-6800, five month of mac bionic chip rate-8500. Follow for all these finally

Edit Update Records

* How to Find Records to Update and Set Their Values

- Use the laptop bookings record that triggered the flow
- Update records related to the laptop bookings record that triggered the flow
- Use the IDs and all field values from a record or record collection
- Specify conditions to identify records, and set fields individually

Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record ▾

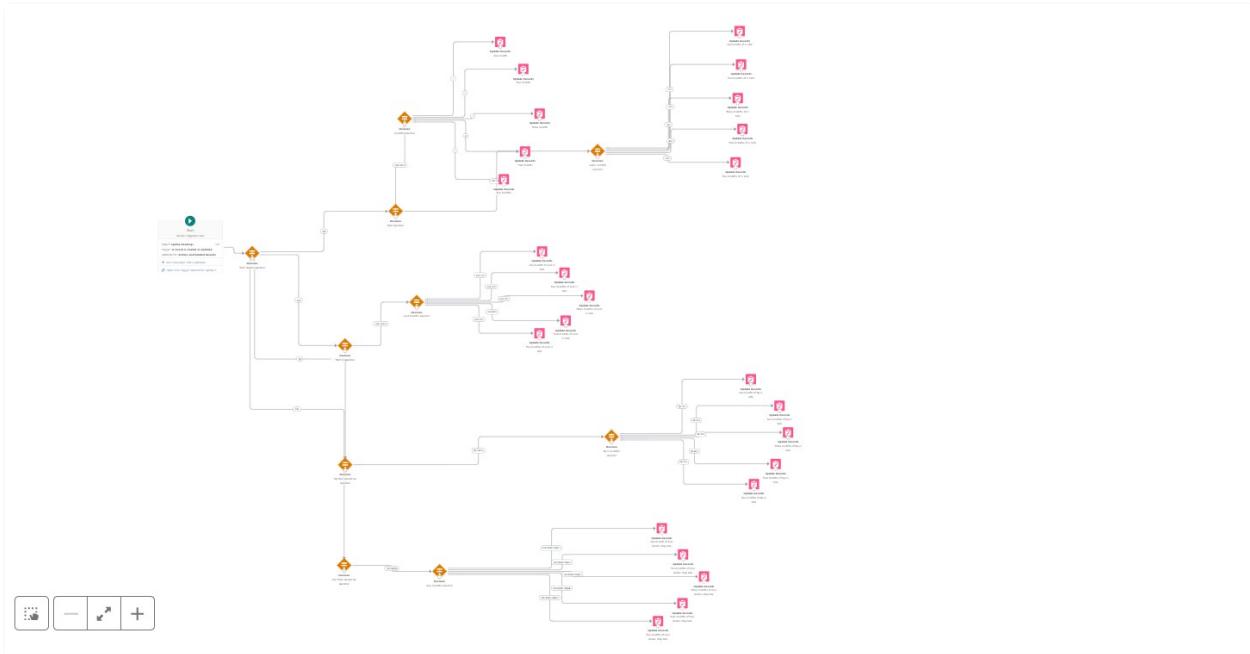
Set Field Values for the Laptop Bookings Record

Field	Value
Amount__c	2000

CancelDone

Click done.

FLOW:



Click on save .

Label:- Laptop distributions, api name:- automatically filled

Save the flow and activate it.

APEX

Apex OverView

Apex is a strongly typed, object-oriented programming language that allows developers to execute flow and transaction control statements on the Lightning platform server in conjunction with calls to the Lightning Platform API. Using syntax that looks like Java and acts like database stored procedures, Apex enables developers to add business logic to most system events, including button clicks, related record updates, and Visualforce pages. Apex code can be initiated by Web service requests and from triggers on objects.

It is as similar as java i.e, it also supports OOP(Object oriented programming) like Classes, objects, methods.

Creating Classes :

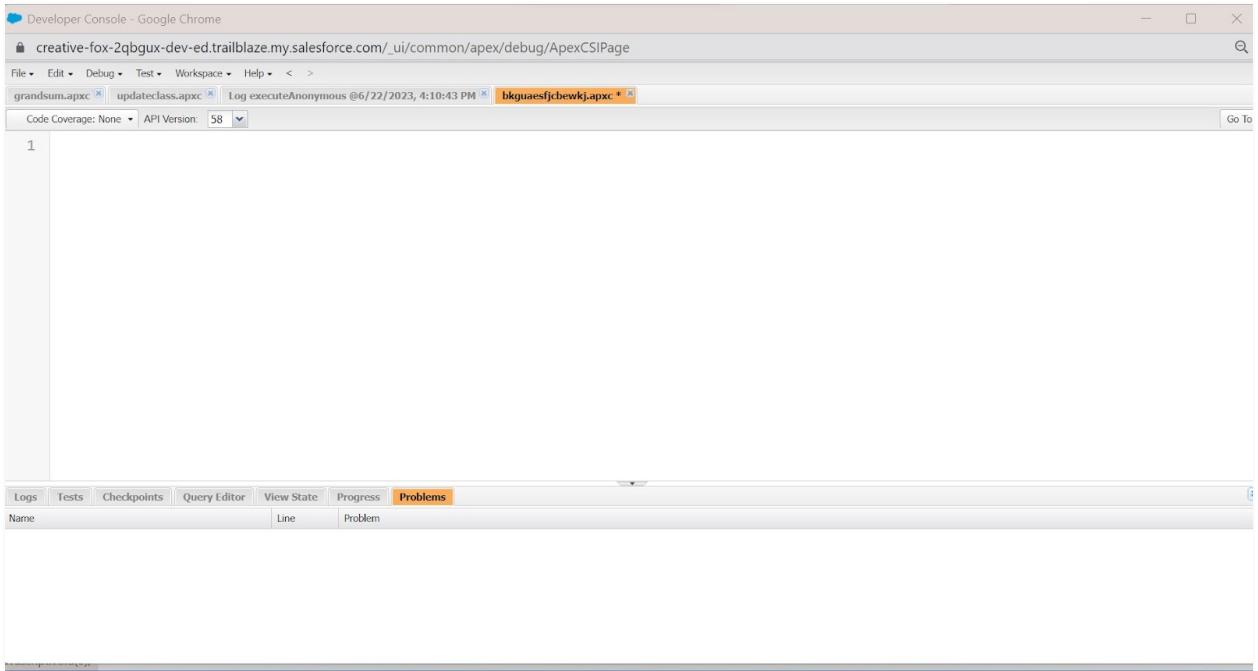
Apex classes are modeled on their counterparts in Java. You'll define, instantiate, and extend classes, and you'll work with interfaces, Apex class versions, properties, and other related class concepts.

- 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.

Access specifiers in Apex :

Apex allows you to use the private, protected, public, and global access modifiers when defining methods and variables.

While triggers and anonymous blocks can also use these access modifiers, they aren't as useful in smaller portions of Apex. For example, declaring a method as global in an anonymous block doesn't enable you to call it from outside of that code.

Private:

This access modifier is the default, and means that the method or variable is accessible only within the Apex class in which it's defined. If you don't specify an access modifier, the method or variable is private.

Protected:

This means that the method or variable is visible to any inner classes in the defining Apex

class, and to the classes that extend the defining Apex class. You can only use this access modifier for instance methods and member variables. This setting is strictly more permissive than the default (private) setting, just like Java.

Public :

This means that the method or variable is accessible by all Apex within a specific package. For accessibility by all second-generation (2GP) managed packages that share a namespace, use public with the @NamespaceAccessible annotation. Using the public access modifier in no-namespace packages implicitly renders the Apex code as @NamespaceAccessible.

Global

This means the method or variable can be used by any Apex code that has access to the class, not just the Apex code in the same application. This access modifier must be used for any method that must be referenced outside of the application, either in SOAP API or by other Apex code. If you declare a method or variable as global, you must also declare the class that contains it as global. This is how a new class is created :

```
1 ▾ public class Student {  
2  
3 }
```

Triggers :

A trigger is a set of Apex code that runs before or after DML(Data Manipulation Language) events.

A DML event could be a variety of data processing tasks that include the standard insert, update, and delete commands.

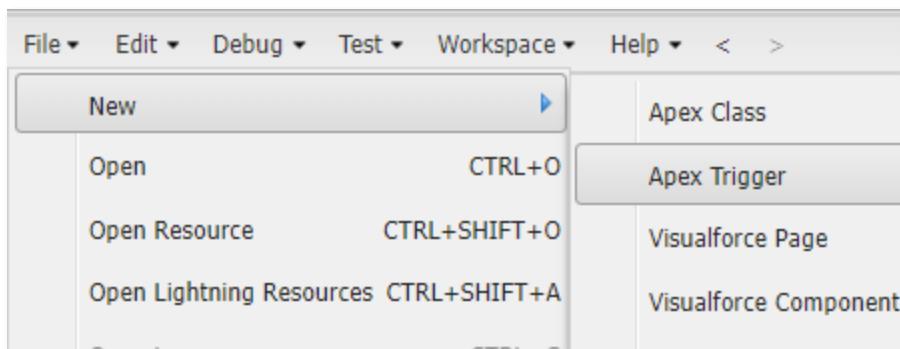
With Apex triggers, you can automate tasks that would otherwise be nearly impossible to accomplish using only the Salesforce user interface. Triggers enable you to create custom scripts that you can implement according to your needs, and the only limitation is your coding skills.

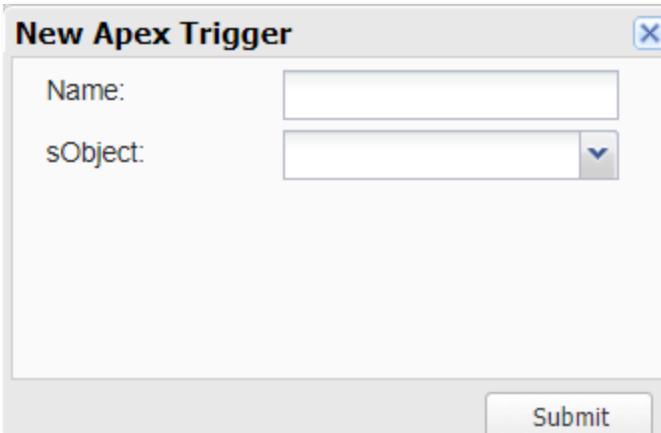
There are two Salesforce Apex trigger types:

Before triggers. These are helpful in cases that require a validation process before accepting a change. They run before any database changes. After triggers. These are helpful in cases where you need to modify your database records and when the necessary value is stored in other records. They run after any database changes. Both types will help you perform custom tasks and manage records effectively. They can help you perform bulk actions as they can handle several records simultaneously.

How to create a new trigger :

1. While still in the trailhead account, navigate to the gear icon in the top right corner.
2. Click on developer console and you will be navigated to a new console window.
3. Click on the File menu in the toolbar, and click on new- Trigger.
4. Enter the trigger name and the object to be triggered.





Syntax For creating trigger :

The syntax for creating trigger is :

Trigger [trigger name] on [object name](Before/After event)

```
{
}
```

The screenshot shows the Salesforce Developer Console in Google Chrome. The URL is google-7da-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage. The tab is titled "LaptopBookingHandler.apxc" and the active tab is "LaptopBooking.apxt". The code coverage is set to "None" and the API version is "58". The code itself is:

```

1 trigger LaptopBooking on Laptop_Bookings__c (After insert,after update) {
2
3     if(trigger.isAfter && ( trigger.isInsert || trigger.isupdate))
4     {
5         LaptopBookingHandler.sendEmailNotification(trigger.new);
6     }
7
8
9 }
```

Trigger code:

```
trigger LaptopBooking on Laptop_Bookings__c (After insert,after update) {
```

```

if(trigger.isAfter && ( trigger.isInsert || trigger.isupdate))
{
    LaptopBookingHandler.sendEmailNotification(trigger.new);
}

}

```

Note:- copy the API names

1.LaptopBooking - trigger name

2.Laptop_Bookings__c -as per your org(go to laptop bookings object and copy from that object api name).

Handler Class:

```

1 * public class LaptopBookingHandler {
2     public static void sendEmailNotification (List<Laptop_Bookings__c> lapList){
3         for(Laptop_Bookings__c lap:lapList)
4             {
5                 Messaging.SingleEmailMessage email = new Messaging.SingleEmailMessage();
6                 email.setToAddresses( new List<String>{lap.Email__c});
7                 email.setSubject('Welcome to our company');
8                 string body = 'Dear ' +lap.Name +', \n';
9                 body += 'Welcome to Laptop Rentals! You have been seen as a valuable customer to us.\n Please continue your journey with us, while
10                 email.setPlainTextBody(body);
11                 Messaging.sendEmail(new List<Messaging.SingleEmailMessage>{email});
12             }
13     }
14 }
15
16 |

```

Code Snippet :

```

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

```

```

Messaging.SingleEmailMessage email = new Messaging.SingleEmailMessage();
email.setToAddresses( new List<String>{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<Messaging.SingleEmailMessage>{email});

}
}
}

```

Note:-

- 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.

Result:

Gmail YouTube Maps Prime Video ZEE5 - Watch TV Sh... Google Disney+ Hotstar ... KodNest Team Salesforce Admin c... https://ap...

Gmail Search mail

Welcome to our company Inbox

vicky project via nhvs1ucf7yj86snh.rw96uyo.5j-d9o7weav.ap27.bnc.salesforce.com to me ▾

Dear smartinternz,
Welcome to Laptop Rentals! You have been seen as a valuable customer to us.
Please continue your journey with us, while we try to provide you with good quality resources.
Laptop Amount = 5100.0
core type = core i5
Laptop type = Hp

Reply Forward

Note: Before creating reports just fill the 10-12 records in the Laptop Bookings object. Create records for each one you have to create at least 2 different records i.e dell(i3), dell(i7), acer(i3), hp(i5), mac(bionic chip).

Reports

Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics.

In Salesforce.com we can easily generate reports in different styles. And can create reports in a very short time and also schedule the reports. Salesforce provides a powerful suit of analytic tools to help you organize, view and analyze your data.

Types of Reports in Salesforce

1. Tabular
2. Summary
3. Matrix
4. Joined Reports

1. Tabular Reports: Simple listing of data without any subtotals. This type of reports provide you most basically to look at your data. Use tabular reports when you want a simple list or a list of items with a grand total.

Example: This type of reports are used to list all accounts, List of contacts, List of opportunities.....etc.....

2. Summary Reports: This type of reports provide a listing of data with groupings and subtotals. Use summary reports when you want subtotals based on the value of a particular field or when you want to create a hierarchically grouped report, such as sales organized by year and then by quarter.

Example: All opportunities for your team sub totaled by Sales Stage and Owner.

3. Matrix Reports: This type of reports allow you to group records both by row and by column. A comparison of related totals, with totals by both row and column. Use matrix reports when you want to see data by two different dimensions that aren't related, such as date and product.

Example: Summarize opportunities by month vertically and by account horizontally.

4. Joined Reports: Blocks of related information in a single report. This type of reports enable you to adopt five different blocks to display different types of related data. Each block can own unique columns, summary fields, formulas, filters and sort order. Use joined reports to group and show data from multiple report types in different views.

Example: You can build a report to show opportunity, case and activity data for your accounts.

Create Report

1. Go to the app -click on the reports tab
2. Click New Report.

Report Name	Description	Folder	Created By	Created On	Subscribed
Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	11/9/2023, 11:01 am	

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

Report Type Name	Category
Activities with consumers	Standard
Total Laptops with Laptop Bookings and consumers	Standard
consumers	Standard
consumers with Laptop Bookings and Total Laptops	Standard
consumers with Billing Process	Standard
consumers with Billing Process and Laptop Bookings	Standard
consumer History	Standard

4. Customize your report

5. Add fields from 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

Outline Filters 2 Previewing a limited number of records. Run the report to see everything.

Groups GROUP ROWS Add group... GROUP VERSIONS Add group...

Subtotal

Rows: 18,100

Columns: Add column... Laptop Bookings: Laptop Bookin... consumer: consumer Name Total no of i... Laptop names core type # Amount

Row Counts Detail Rows Subtotals Grand Total

Update Preview Automatically

Conditional Formatting

Follow the above image group rows and columns.

6. Click the column drop down and select bucket list.

Edit Bucket Column

* Field	* Bucket Name
Amount	types of versions
<input type="button" value="Add >"/>	
<= 900	basic
<input type="button" value="Add >"/>	
> 900 to 1500	intermediate
<input type="button" value="Add >"/>	
> 1,500 to 10000	high
<input type="button" value="Add >"/>	
> 10,000	very high

Treat empty Amount values in the report as zeros.

Click apply it.

Follow the picture and save or run it.

Report: consumers with Laptop Bookings and Total Laptops

consumer with laptops and total laptops

Total Records: 11 Total Amount: ₹81,600

consumer: consumer Name	Laptop Bookings: Laptop Bookings Name	Address	phone number	Laptop names	core type	types	Amount	types of versions
rakesh (1)	smartinternz	warangal	7894561235	Mac	Bionic chip	high	₹8,000	high
Subtotal							₹8,000	
rushi (2)	google	gachibowli	7538964123	Dell	core i5	high	₹6,000	high
	code hub	gachibowli	7538964123	Mac	Bionic chip	high	₹8,000	high
Subtotal							₹14,000	
sunny (1)	smartinternz	madhapur	7534127896	Dell	core i3	high	₹3,000	high
Subtotal							₹3,000	
sure (4)	smartinternz	kphb	7895621430	Acer	core i5	high	₹6,500	high
	pandora	kphb	7895621430	Hp	core i7	high	₹11,000	very high
	stacknexus	kphb	7895621430	Acer	core i7	high	₹9,000	high
Subtotal							₹30,100	
uday (3)	pandora	uppal	7894561230	Hp	core i5	high	₹8,500	high
Row Counts	<input checked="" type="checkbox"/>	Detail Rows	<input checked="" type="checkbox"/>	Subtotals	<input checked="" type="checkbox"/>	Grand Total	<input checked="" type="checkbox"/>	

Sharing report to owner

1. Click edit drop down and select subscribe option

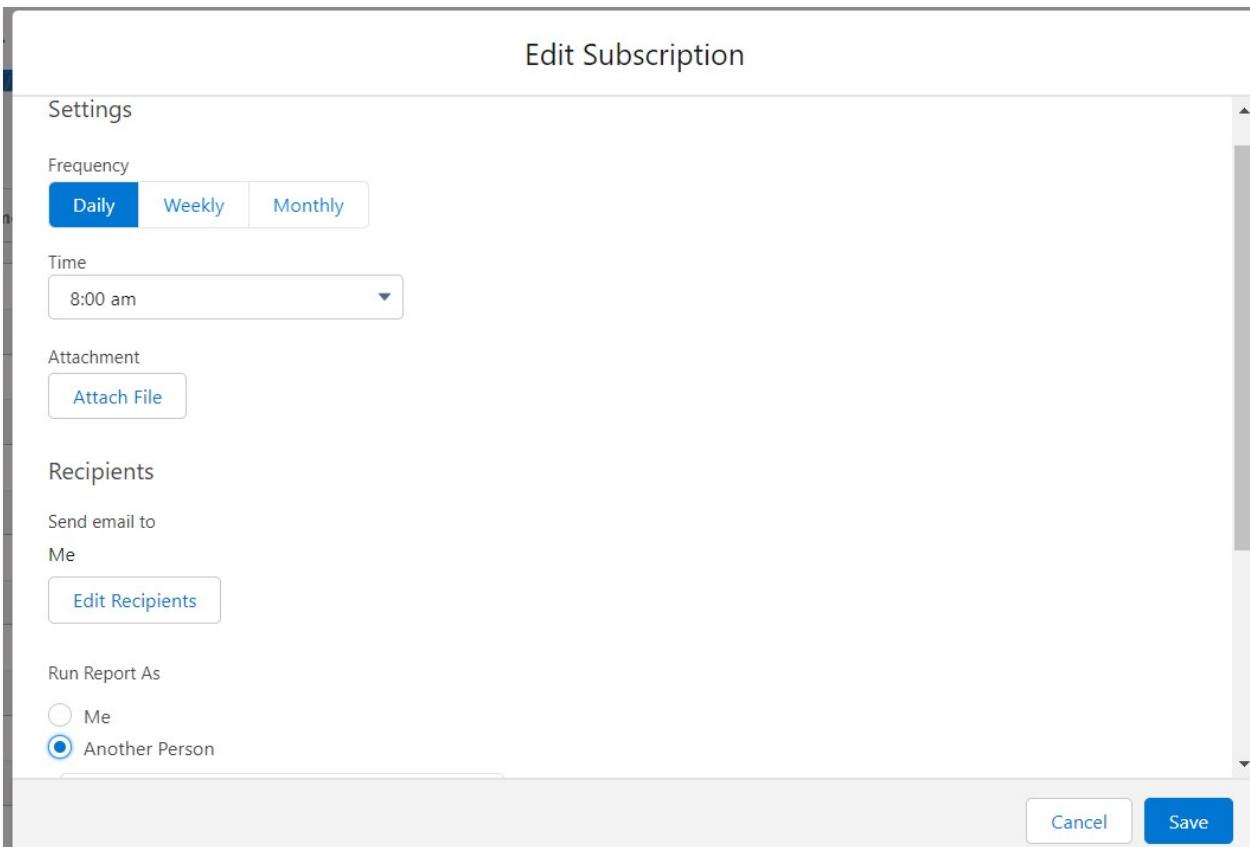
Report: consumers with Laptop Bookings and Total Laptops

consumers with laptops and total laptop

Total Records: 11 Total Laptop available: 429 Total Amount: ₹81,600

	Laptop Bo...	con...	Total no of lapt...	Laptop available	Address	phone number	Email	Laptop names	core type	Amount
1	smartinternz	rakesh	50	39	warangal	7894561235	rakesh@gmail.com	Mac	Bionic chip	₹8,000
2	smartinternz	sure	50	39	kphb	7895621430	sure@gmail.com	Acer	core i5	₹6,500
3	pandora	sure	50	39	kphb	7895621430	sure@gmail.com	Hp	core i7	₹11,000
4	google	rushi	50	39	gachibowli	7538964123	rushi@gmail.com	Dell	core i5	₹6,000
5	stacknexus	sure	50	39	kphb	7895621430	sure@gmail.com	Acer	core i7	₹9,000
6	pandora	uday	50	39	uppal	7894561230	uday@gmail.com	Hp	core i5	₹8,500
7	smartinternz	sunny	50	39	madhapur	7534127896	sunny@gmail.com	Dell	core i3	₹3,000
8	code hub	uday	50	39	uppal	7894561230	uday@gmail.com	Dell	core i7	₹10,000
9	code hub	uday	50	39	uppal	7894561230	uday@gmail.com	Mac	Bionic chip	₹8,000
10	stacknexus	sure	50	39	kphb	7895621430	sure@gmail.com	Acer	core i3	₹3,600
11	code hub	rushi	50	39	gachibowli	7538964123	rushi@gmail.com	Mac	Bionic chip	₹8,000
12				429						₹81,600

2. Follow as per below image.



3. After selecting the run report as a “another person” select your personal account or whom you want to send that mail to.
4. Click save.

NOTE: The owner gets daily email notification of that laptop booking report so that he can see all data remotely.

Dashboards

Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities. Before building, reading, and sharing dashboards, review these dashboard basics.

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.

Create Dashboard

1. Go to the app >> click on the Dashboards tabs.

The screenshot shows the Employee Management application interface. At the top, there is a navigation bar with various tabs: Home, Employees, Assets, Asset Services, Projects, ProjectTasks, Reports, and Dashboards. The 'Dashboards' tab is highlighted with a red box. Below the navigation bar, there is a search bar labeled 'Search...' and a toolbar with several icons. The main area is titled 'Dashboards' and has a sub-section 'Recent'. It shows a list of recent dashboards: 'Created by Me', 'Private Dashboards', and 'All Dashboards'. On the right side of the main area, there is a button labeled 'New Dashboard' with a red box around it, and a 'New Folder' button below it.

2. Give a Name and select the folder that was created, and click on create.

The screenshot shows the 'New Dashboard' dialog box. It has a title 'New Dashboard'. There are three input fields: 'Name' with the value 'data analytics of laptops', 'Description' with the value 'total amount of data in dashboards', and 'Folder' with the value 'total rents amount' and a 'Select Folder' button next to it. At the bottom right, there are 'Cancel' and 'Create' buttons, with the 'Create' button being blue.

3. Select add component.

The screenshot shows the dashboard editor interface. At the top, there is a navigation bar with tabs: Home, Employees, Assets, Asset Services, Projects, ProjectTasks, Reports, and Dashboards. The 'Dashboards' tab is highlighted. Below the navigation bar, there is a toolbar with various icons. The main area shows a grid of dashboard components. A red box highlights the '+ Component' button in the toolbar at the top right of the editor area.

4. Select a Report and click on select.



5. Select the dark component and add to the dashboards.
6. Save it.
7. Click done.