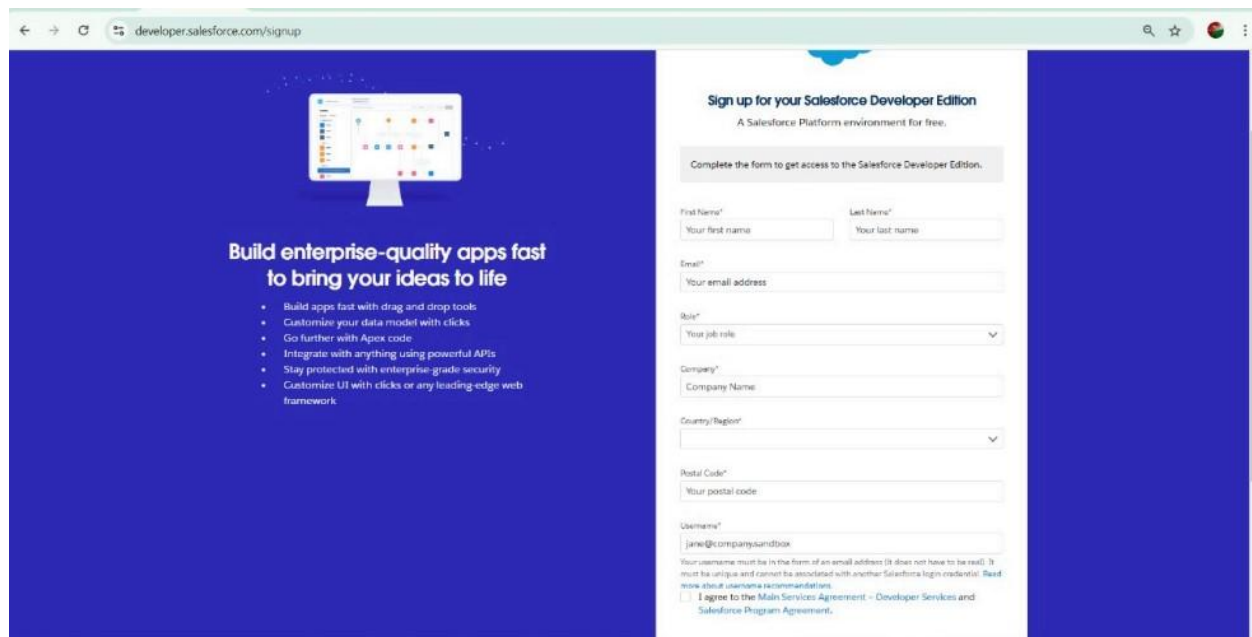


# A CRM APPLICATION FOR LAPTOP RENTALS CRM

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 screenshot shows the Salesforce Developer Edition sign-up page. The left side features a blue background with a laptop icon and the text "Build enterprise-quality apps fast to bring your ideas to life". Below this is a list of bullet points: "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 side is a white form titled "Sign up for your Salesforce Developer Edition" with the subtitle "A Salesforce Platform environment for free." and the instruction "Complete the form to get access to the Salesforce Developer Edition." The form fields include: "First Name\*" (placeholder: "Your first name"), "Last Name\*" (placeholder: "Your last name"), "Email\*" (placeholder: "Your email address"), "Role\*" (placeholder: "Your job role" with a dropdown arrow), "Company\*" (placeholder: "Company Name"), "Country/Region\*" (placeholder with a dropdown arrow), "Postal Code\*" (placeholder: "Your postal code"), and "Username\*" (placeholder: "jane@companyandbook"). 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. 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.

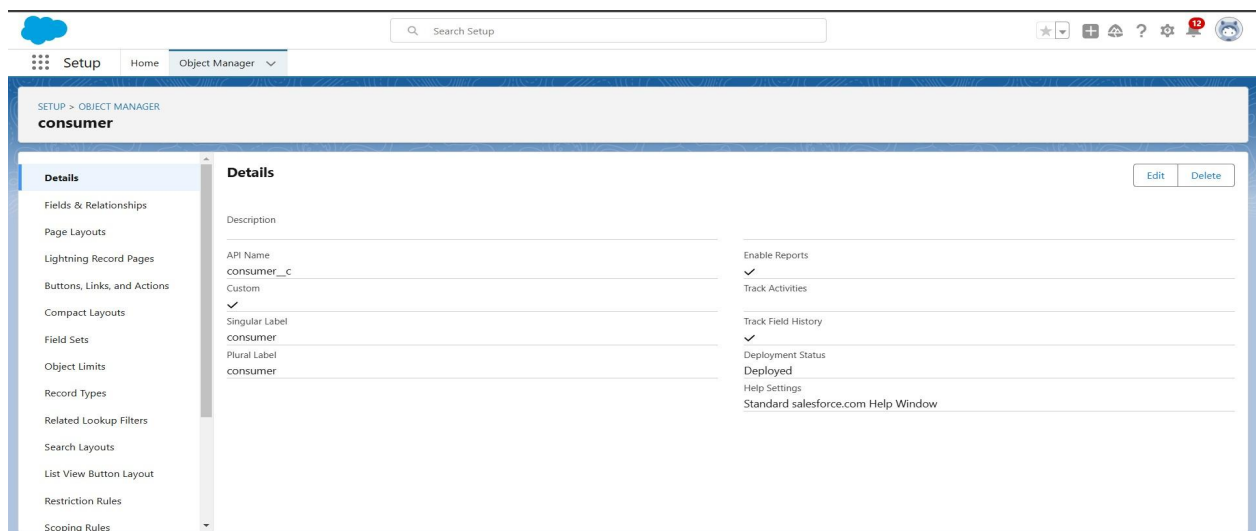
The screenshot displays the Salesforce Setup interface for creating a custom object named 'Total Laptops'. The top navigation bar includes the Salesforce logo, a search bar, and various utility icons. Below the navigation bar, the 'Setup' menu is open, showing 'Object Manager' as the selected option. The main content area is titled 'SETUP > OBJECT MANAGER' and 'Total Laptops'. On the left, a sidebar lists various 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 currently selected. The 'Details' panel on the right contains the following configuration options:

Field	Value
Description	
API Name	Total_Laptop__c
Custom	✓
Singular Label	Total Laptops
Plural Label	Total Laptops
Enable Reports	✓
Track Activities	✓
Track Field History	✓
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

At the top right of the 'Details' panel, there are 'Edit' and 'Delete' buttons.

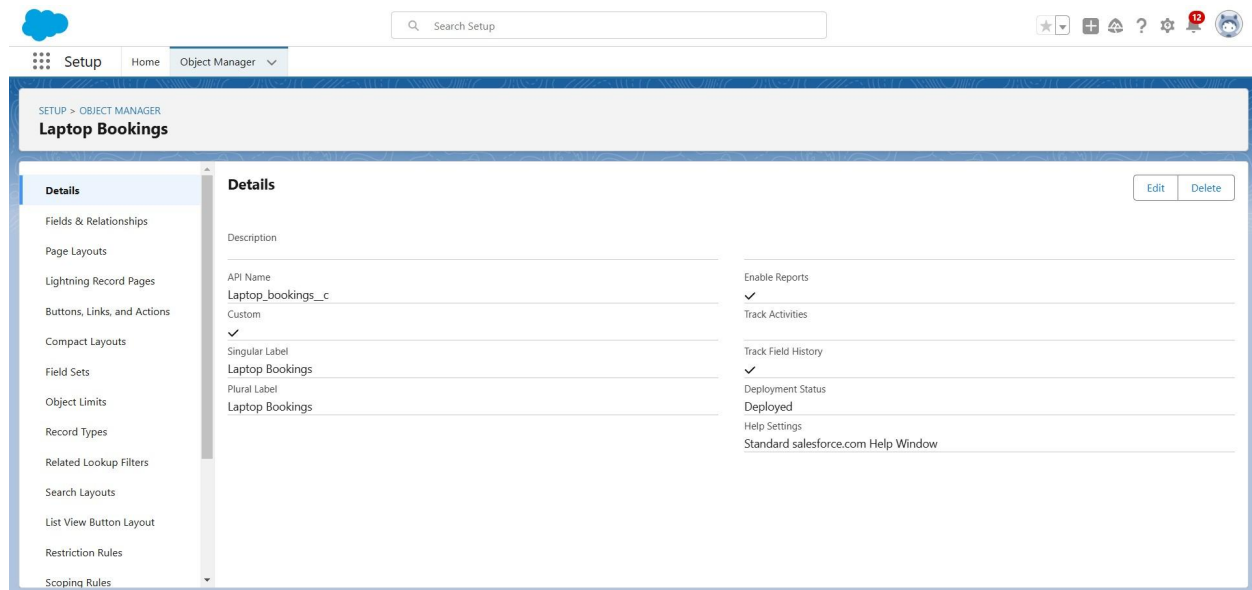
## Create consumer Object

- 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.



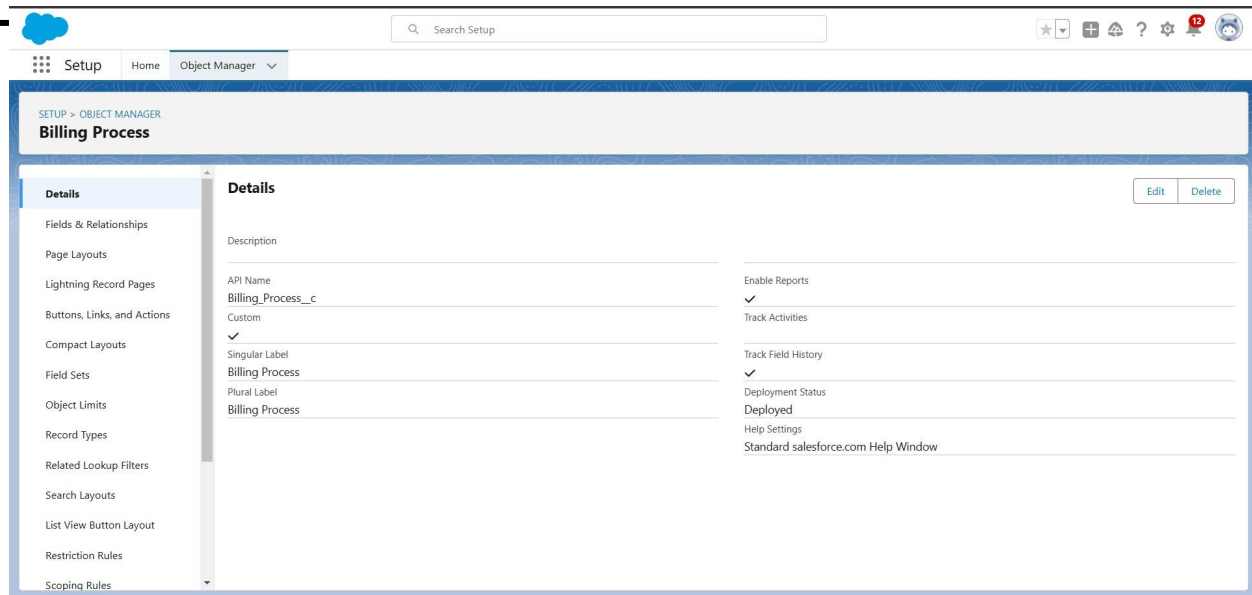
## Create Laptop Bookings Object

- 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 >> consumer\_name Data Type >> Name
- Click on Allow reports, Allow search and Track Field History,
- Allow search >> Save.



## 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 >> consumer\_name Data Type >> Name
- Click on Allow reports, Allow search and Track Field History,
- Allow search >> Save.



## Tabs

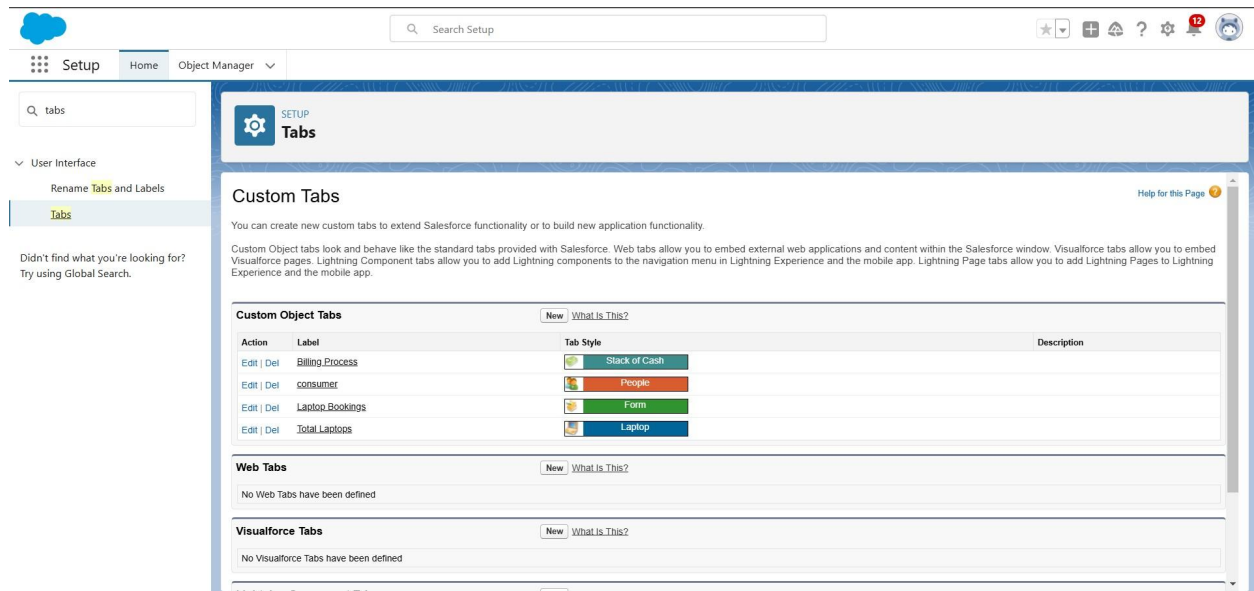
**What is Tab:** A tab is like a user interface that is used to build records for objects and to view the records in the objects.

### Types of Tabs:

- **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.
- **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.
- **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 proles 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 Proles: Search proles (System administrator) in the search bar >> click on the arrow button >> save & finish.

The screenshot shows the 'App Settings' interface for an app named 'LAPTOP RENTALS'. The left sidebar lists 'App Settings' with sub-items: 'App Details & Branding' (selected), 'App Options', 'Utility Items (Desktop Only)', 'Navigation Items', and 'User Profiles'. The main content area is titled 'App Details & Branding' and includes instructions: 'Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.' It is divided into two columns: 'App Details' and 'App Branding'. The 'App Details' column contains fields for 'App Name' (filled with 'LAPTOP RENTALS'), 'Developer Name' (filled with 'LAPTOP\_RENTALS'), and 'Description' (with a placeholder 'Enter a description...'). The 'App Branding' column contains an 'Image' field with a laptop icon and the text 'Laptop on rent', a 'Primary Color Hex Value' field with a blue color swatch and the value '#0070D2', and a 'Clear' link. Below these is the 'Org Theme Options' section with a checkbox 'Use the app's image and color instead of the org's custom theme' which is currently unchecked. At the bottom is an 'App Launcher Preview' showing the app icon and name 'LAPTOP RENTALS'.

## 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 specic object. Hence, the overall searching, deletion, and editing of the records become simpler and quicker. Types of Fields:

**1. Standard Fields:** As the name suggests, the Standard Fields are the predened elds 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 eld. Otherwise, users have the option to delete them at any point from the application freely. Moreover, we have some elds that you will nd common in every Salesforce application. They are,

>>Created By

>>Owner

>> Last Modified

>> Field Made During object Creation

**2. Custom Fields:** On the other side of the coin, Custom Fields are highly exible, 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” and Click on Next

### 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

The screenshot shows the Salesforce Setup interface. The breadcrumb trail is 'SETUP > OBJECT MANAGER > consumer'. The left sidebar contains a list of setup options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main content area is titled 'Fields & Relationships' and shows a table of 8 items, sorted by Field Label. The table has columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The items listed are: Address (Text Area(255)), consumer status (Picklist), consumer\_name (Name, indexed), Created By (Lookup(User)), Email (Email), Last Modified By (Lookup(User)), Owner (Lookup(User,Group), indexed), and Phone Number (Phone).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Text Area(255)		
consumer status	consumer_status__c	Picklist		
consumer_name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone Number	Phone_Number__c	Phone		

## 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**

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

Field Label: Laptop names

Values: ☐ Use global picklist value set ☒ Enter values, with each value separated by a new line

Dell  
Acer  
Hp  
Mac

☐ Display values alphabetically, not in the order entered

☐ Use first value as default value

☒ Restrict picklist to the values defined in the value set

Field Name: Laptop\_type

Description:

Help Text:

Previous Next Cancel

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 .

Setup Home Object Manager

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

Sourcing Rules

Field Label: Processors

Values: ☐ Use global picklist value set ☒ Enter values, with each value separated by a new line

core i3  
core i5  
core i7  
biotic chip

☐ Display values alphabetically, not in the order entered

☐ Use first value as default value

☒ Restrict picklist to the values defined in the value set

Field Name: Processors

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

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 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.

The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area is titled 'Edit Field Dependency' and shows a table with columns for 'Dell', 'HP', 'Mac', and 'Acer'. The rows are categorized by 'Processors' and 'Bionic chip'. The 'Include Values' button is highlighted, indicating that the selected values are included in the dependent picklist.

Laptop names:	Dell	HP	Mac	Acer
Processors:	core i3	core i3	core i3	core i3
	core i5	core i5	core i5	core i5
	core i7	core i7	core i7	core i7
	Bionic chip	Bionic chip	Bionic chip	Bionic chip

### 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

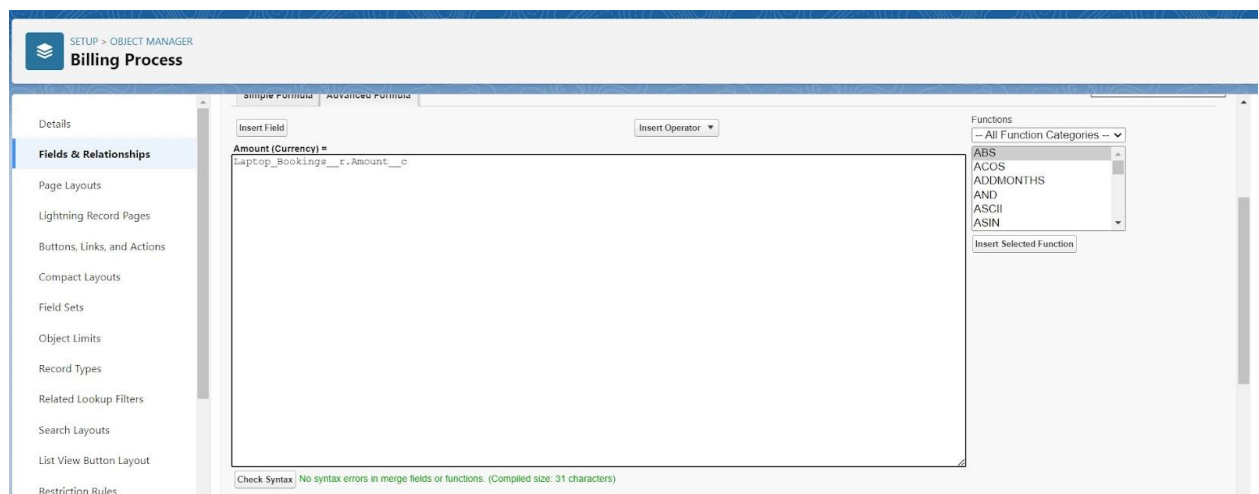
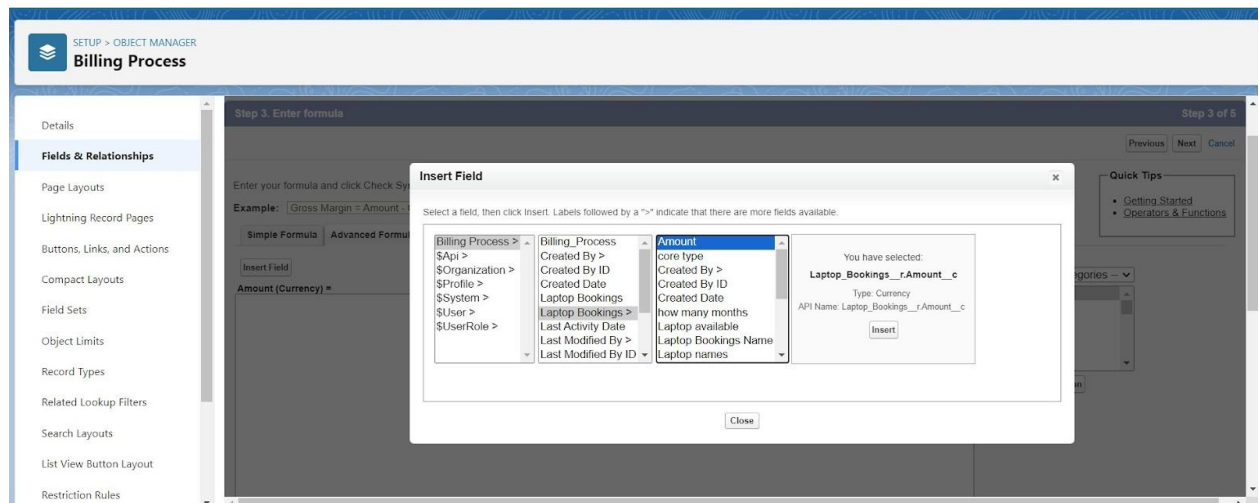
The screenshot shows the Salesforce Setup interface. On the left, the 'Billing Process' object is selected under 'Fields & Relationships'. The 'New Relationship' dialog box is open, showing a list of related objects. The 'consumer' object is selected. The dialog box has a 'Step 2 of 6' indicator and 'Previous', 'Next', and 'Cancel' buttons.

## 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
    - a. Cash
    - b. Check
    - c. Credit card
    - d. Debit card
    - e. UPI
    - f. Phonepe
    - g. Gpay
    - h. 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. 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”
8. Select the Decimal places as “0” and Click on Next

The screenshot shows the Salesforce Object Manager interface for the 'Total laptops' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules. The main area is titled 'Fields & Relationships' and shows a 'New' field being created. The 'Field Label' is 'Laptops Available' and the 'Field Name' is 'Laptops\_Available'. Below this, there is a checkbox 'Auto add to custom report type' which is checked, and a link 'Add this field to existing custom report types that contain this entity'. The 'Formula Return Type' section is active, showing a list of data types: None Selected, Checkbox, Currency, Date, Date/Time, Number (selected), Percent, Text, and Time. To the right of these options, there is a section 'Select one of the data types below.' with detailed examples for each type. At the bottom, the 'Options' section shows 'Decimal Places' set to '0' with an example '999'.

## 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. Save the validation rule

The screenshot shows the Salesforce Setup page for creating a validation rule. The breadcrumb trail is 'SETUP > OBJECT MANAGER consumer'. The left sidebar lists various setup 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, and Restriction Rules. The main content area is titled 'Display an error if Discount is more than 30%'. It includes a section for the formula expression, which is 'OR( ISBLANK( phone\_number\_\_c ) , ISBLANK( email\_\_c ) )'. Below the formula, there is a 'Check Syntax' button and a message 'No errors found'. To the right of the formula, there is a 'Functions' panel with a list of functions: ABS, ACOS, ADDMONTHS, AND, ASCII, and ASIN. Below the functions, there is a 'Help on this function' link. The 'Error Message' section is also visible, with an example message 'Discount percent cannot exceed 30%'. The 'Error Location' is set to 'Top of Page'.

## 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.
2. 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.
3. Give access and save

The screenshot displays the Salesforce Setup interface for the 'Owner' profile. The left sidebar shows the 'Setup' menu with 'Profiles' selected. The main content area is titled 'Profiles' and shows the 'Owner' profile details. The 'Page Layouts' section lists various layouts assigned to the profile, including Global, Email Application, Home Page Layout, Account, Alternative Payment Method, and Location. The 'Custom Object Permissions' section is highlighted with a blue arrow, showing a table of permissions for various objects. The 'Session Settings' section shows the session timeout set to '2 hours of inactivity' and the session security level set to 'None'.

Individuals	Invoices	Leads	Work Types	Work Type Groups
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

	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 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"/>

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
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"/>

**Session Settings**

Session Times Out After:

Session Security Level Required at Login:

**Password Policies**



## 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.
4. Give access and save

Profile: Agent

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Login IP Ranges (0) | Enabled Apex Class Access (0) | Enabled Visualforce Page Access (0) | Enabled External Data Source Access (0) | Enabled Named Credential Access (0) | Enabled External Credential Principal Access (0) | Enabled Custom Metadata Type Access (0) | Enabled Custom Setting Definitions Access (0) | Enabled Flow Access (0) | Enabled Service Presence Status Access (0) | Enabled Custom Permissions (0)

**Profile Detail** [Edit] [Clone] [Delete] [View Users]

Name	Agent
User License	Salesforce Platform
Description	
Created By	Ruvan Chandra Kumar Singh Chowhan 18/11/2024, 11:25 am
Modified By	Ruvan Chandra Kumar Singh Chowhan 18/11/2024, 11:26 am

**Page Layouts**

Standard Object Layouts	Global	Global Layout [View Assignment]	Fulfillment Order Item Tax	Fulfillment Order Item Tax Layout [View Assignment]
Email Application	Not Assigned	[View Assignment]	Fulfillment Order Product	Fulfillment Order Product Layout [View Assignment]
Home Page Default	Home Page Default	[View Assignment]	Idea	Varies by Record Type [View Assignment]
Account	Account Layout	[View Assignment]	Individual	Individual Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout	[View Assignment]	Invoice	Invoice Layout [View Assignment]

**Custom Object Permissions**

	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 [i]

Session Security Level Required at Login: --None-- [i]

**Password Policies**

User passwords expire in: 90 days [v]

Enforce password history: 3 passwords remembered [v]

Minimum password length: 8 [i]

Password complexity requirement: Must include alpha and numeric characters [v]

Password question requirement: Cannot contain password [v]

Maximum invalid login attempts: 10 [v]

Lockout effective period: 15 minutes [v]

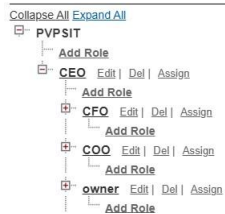
## Roles and Hierarchy

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.
3. Give Label as “owner” and Role name gets auto populated. Then click on Save.



The screenshot shows the 'New Role' form in Salesforce. The form has a header 'Role Edit' and a sub-header 'New Role'. Below the header is a 'Role Edit' section with the following fields:

- Label: owner
- Role Name: owner
- This role reports to: CEO
- Role Name as displayed on reports: (empty field)

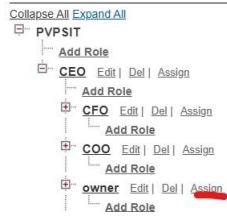
At the bottom of the form are three buttons: 'Save', 'Save & New', and 'Cancel'.

### Creating agent 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.
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

### Creating Owner User

1. 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 : shah
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.

**SETUP**  
**Users**

User  
**Vicky Shah**
User Profile Help for this Page

[Permission Set Assignments](#) | 
[Permission Set Assignments: Activation Required](#) | 
[Permission Set Group Assignments](#) | 
[Permission Set License Assignments](#) | 
[Personal Groups](#) | 
[Public Group Membership](#) | 
[Queue Membership](#) | 
[Team](#) | 
[Managers in the Role Hierarchy](#) | 
[OAuth Apps](#) | 
[Third-Party Account Links](#) | 
[Installed Mobile Apps](#) | 
[Authentication Settings for External Systems](#) | 
[Login History](#) | 
[User Provisioning Accounts](#)

**User Detail**
Edit Sharing Reset Password Freeze View Summary

Name	Vicky Shah	Role	<u>owner</u>
Alias	vicky	User License	Salesforce
Email	buvasingh05@gmail.com <span>[Verify]</span>	Profile	<u>Standard User</u>
Username	buvasingh05@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	vickys <span>[i]</span>	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<u>View</u>
Delegated Approver		Data.com User Type	<span>[i]</span>
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> <span>[i]</span>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> <span>[i]</span>
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/> <span>[i]</span>

## Creating Agent User

- Go to setup -type users in quick find box - select users -click New user.
- Fill in the fields
- First Name : ram
- Last Name : sharma
- Alias : Give a Alias Name
- Email id : Give your Personal Email id
- Username : Username should be in this form: text@text.text
- Nick Name : Give a Nickname
- Role : Agent
- User license : Salesforce platform
- Profiles : standard platform user.

**SETUP**  
**Users**

User  
**Ram Sharma**
User Profile Help for this Page

[Permission Set Assignments](#) | 
[Permission Set Assignments: Activation Required](#) | 
[Permission Set Group Assignments](#) | 
[Permission Set License Assignments](#) | 
[Personal Groups](#) | 
[Public Group Membership](#) | 
[Queue Membership](#) | 
[Team](#) | 
[Managers in the Role Hierarchy](#) | 
[OAuth Apps](#) | 
[Third-Party Account Links](#) | 
[Installed Mobile Apps](#) | 
[Authentication Settings for External Systems](#) | 
[Login History](#) | 
[User Provisioning Accounts](#)

**User Detail**
Edit Sharing Reset Password Freeze View Summary

Name	Ram Sharma	Role	<u>Agent</u>
Alias	rshar	User License	Salesforce Platform
Email	buvasingh05@gmail.com <span>[Verify]</span>	Profile	<u>Standard Platform User</u>
Username	buvasingh05@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	rsharma <span>[i]</span>	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>

## 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.

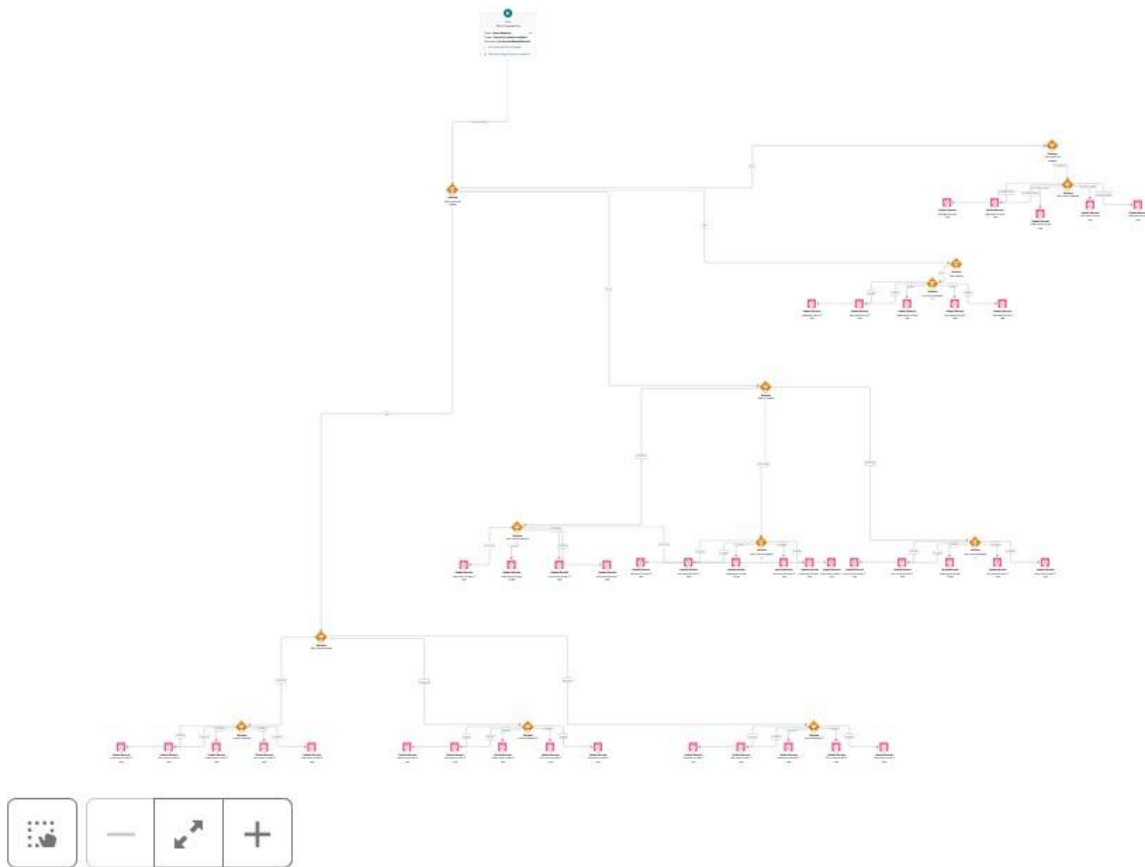
### Why do we need to create a flow:

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

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 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 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 remaining laptops also\*\* Final Flow:**



## Apex

### 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 le.

### Apex 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).

### Apex Class

```
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\nPlease continue your journey with us, while we try to provide you with good quality resources.\n\nLaptop Amount = ' + lap.Amount__c + '\n\n core type\n\n= '+lap.Processors__c +' \n\n Laptop type = '+lap.Laptop_names__c;\n        email.setPlainTextBody(body);\n        Messaging.sendEmail(new List<Messaging.SingleEmailMessage>{email});\n    }\n}\n}
```

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.

## 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. **Tabula 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 sub totals. 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.
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.
4. Customize your report

5. Add fields from left pane as shown below
6. Click the column drop down and select bucket list.
7. Follow the picture and save or run it.



LAPTOP RENTALS

Total Laptops ▼ consumer ▼ Billing Process ▼ Laptop Bookings ▼ Report Builder ▼ X

Q Search...

★ + ? ⚙️ 12

REPORT ▼

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

↶ ↷ Add Chart Save & Run Save Close Run

Outline Filters

Groups

GROUP ROWS

Add group...

types of version X

GROUP COLUMNS

Add group...

Columns

Add column...

consumer: consumer\_name X

Laptop Bookings: Laptop Bookings X

Total No Of Laptops: Total Laptops X

Laptop names X

Processors X

# Amount X

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

Update Preview Automatically

types of version ↑	consumer: consumer_name	Laptop Bookings: Laptop Bookings	Total No Of Laptops: Total Laptops	Laptop names	Processors	Amount ↓
intermediate (1)	Buvan	Student bookings	1	Dell	core i3	₹1,000
Subtotal						₹1,000
High (4)	Devara	Employee	10	Mac	Bionic chip	₹6,800
	Jyothendra	Others	2	HP	core i5	₹3,400
	Charan	Others	3	Dell	core i5	₹2,500
	Aloo Arjun	Employee	20	HP	core i5	₹1,700
Subtotal						₹14,400
Total (5)						₹15,400

Row Counts ☒ Detail Rows ☒ Subtotals ☒ Grand Total ☒ Conditional Formatting

## 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.

