A CRM APPLICATION FOR LAPTOP RENTALS

1. Project Overview

The Laptop Rentals CRM Application is a robust solution designed to streamline and optimize the daily operations of a laptop rental business. The primary objective is to efficiently manage laptop inventory, rental transactions, and customer interactions while providing insightful reports to key stakeholders. This project utilizes Salesforce's capabilities, including custom objects, workflows, and dashboards, to enhance operational efficiency, improve customer satisfaction, and ensure data accuracy.

Through this project, we aim to provide a centralized platform for managing and analyzing rental operations, enabling the organization to make data-driven decisions and achieve sustainable growth.

Key aspects of the project include automated workflows, role-based access control, and real-time data visualization, all tailored to the specific needs of a laptop rental business.

2. Objectives

Business Goals:

- Improve the efficiency of laptop rental operations.
- Enhance customer experience with personalized services and seamless transactions.
- Generate actionable insights into inventory and revenue trends.

Technical Goals:

- Create custom Salesforce objects for managing laptops, rentals, and customers.
- Implement dashboards and reports to monitor key metrics.

3. Salesforce Key Features and Concepts Utilized

The **Laptop Rentals CRM Application** leverages Salesforce’s robust features and concepts to streamline the management of customer interactions, rental processes, and business operations. Below are the key features and concepts utilized in the project:

Salesforce Objects

    - **Standard Objects:** Objects like Accounts, Contacts, and Cases were used to

    manage customer data, track interactions, and address support requests.
  - **Custom Objects:** All Laptop Rentals objects were created to manage inventory, rental agreements, and transaction history specific to laptop rentals.

Automation Tools

  - **Process Builder:** Automated workflows were set up to send reminders for rental due dates, initiate follow-ups, and update status fields.
  - **Flow Builder:** Complex logic was implemented to automate rental request approvals and inventory management processes.
  - **Email Alerts:** Notifications were automated for both customers (e.g., rental confirmations) and staff (e.g., low stock alerts).

Service Cloud Features

  - **Case Management:** Used to handle customer inquiries, complaints, and service requests, ensuring timely resolutions.
  - **Knowledge Base:** A repository of FAQs and troubleshooting guides was set up to assist customers and agents with common queries.

Sales Cloud Features

  - **Opportunity Management:** Opportunities were used to track potential rental agreements and upselling of additional services (e.g., extended warranties).
  - **Lead Conversion:** Captured customer leads through forms and converted them into rental accounts seamlessly.

Reports and Dashboards

- Created custom reports to track metrics such as the number of active rentals, total revenue, and inventory usage.
- Dashboards provided real-time insights for the management team to monitor operations and identify trends.

Security Features

  - **Role Hierarchy and Sharing Rules:** Ensured that sensitive data, such as rental contracts and payment details, was accessible only to authorized personnel.
  - **Field-Level Security:** Restricted visibility of confidential fields like payment details.

Integration Capabilities

  - Integrated with third-party payment gateways for seamless online payments.
  - Synced with inventory management systems to ensure real-time availability of laptops.

4. Detailed Steps to Solution Design

Creating Developer Account:

1. Visit Salesforce Developer Signup.
2. Fill in the required details: Name, Email, Role (Developer), Company, and Username (e.g.username@organization.com).

3. Verify the account through the email received and set up your password.

Object Creation

Create Total Laptops Object

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

Click on Allow reports,Allow search and Track Field History,

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

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.

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

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.

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

Click on Allow reports,Allow search and Track Field History,

Allow search >> Save.

Tabs

Creating a Custom 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 .

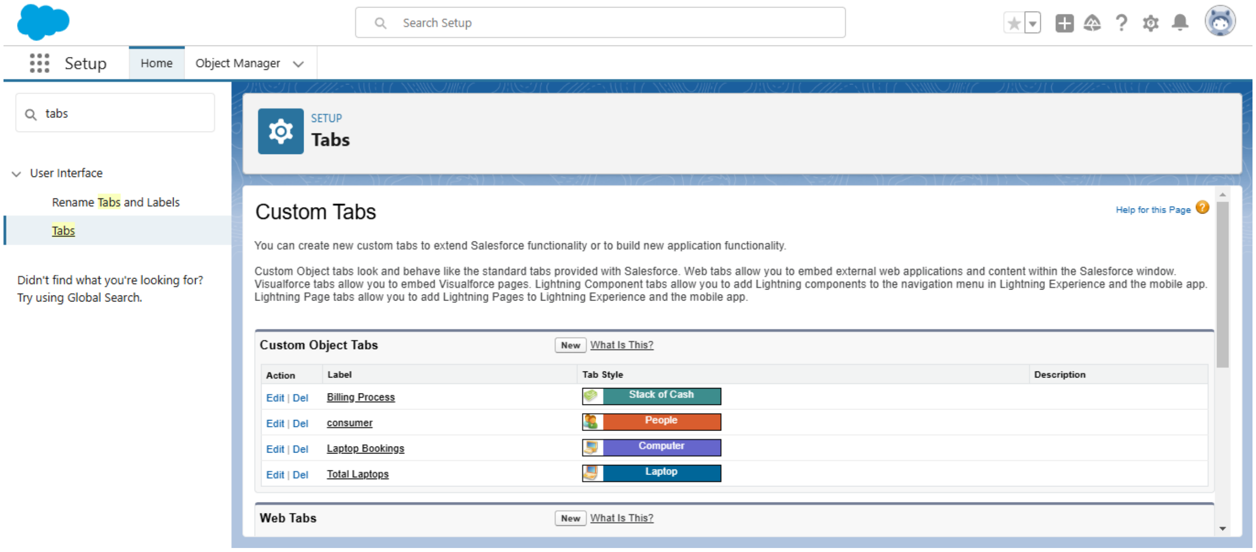
3. Make sure that the Append tab to users' existing personal customizations is checked.

4. Click save.

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 custom tab.



Tabs

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs

Action	Label	Tab Style	Description
Edit | Del	Billing Process	Stack of Cash	
Edit | Del	consumer	People	
Edit | Del	Laptop Bookings	Computer	
Edit | Del	Total Laptops	Laptop	

Web Tabs

The Lightning App

Create a Lightning App

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

5. To Add User Profiles: Search profiles (System administrator) in the search bar >> click on the arrow button >> save & finish.

Fields

Creating the field in Consumer Object

1. 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

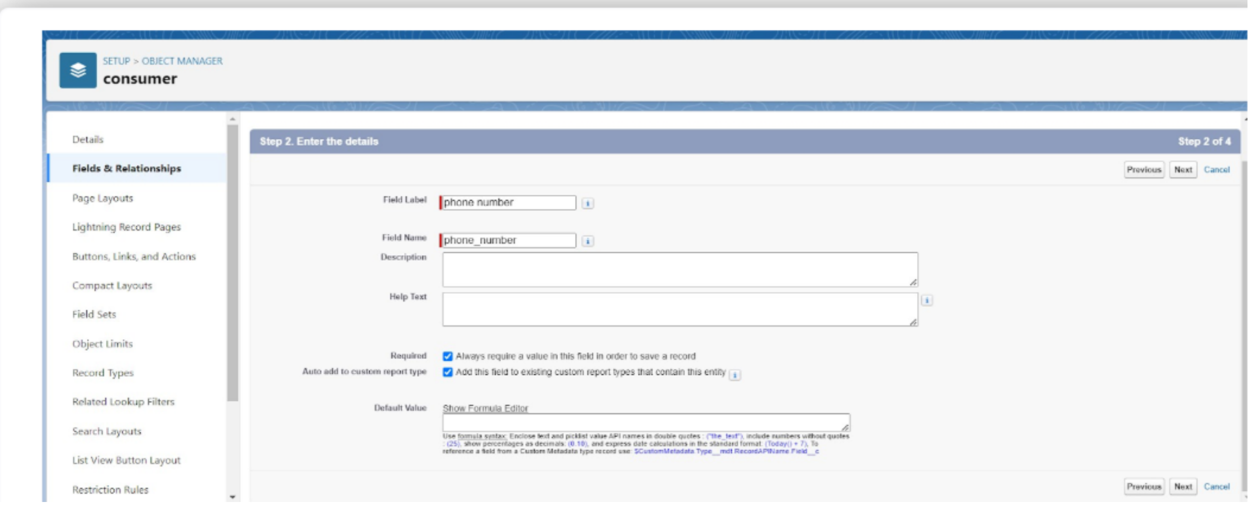
5. Fill the Above as following:

Field Label: Phone number

Field Name : gets auto generated

Click the required option checkbox.

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



Step 2. Enter the details

Step 2 of 4

Field Label: phone number

Field Name: phone_number

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:

Use formula syntax: Enclose text and picklist value API names in double quotes : ("the_text"), include numbers without quotes : (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: $CustomMetadata.Type__mdt.RecordAPIName.Field__c

2. 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

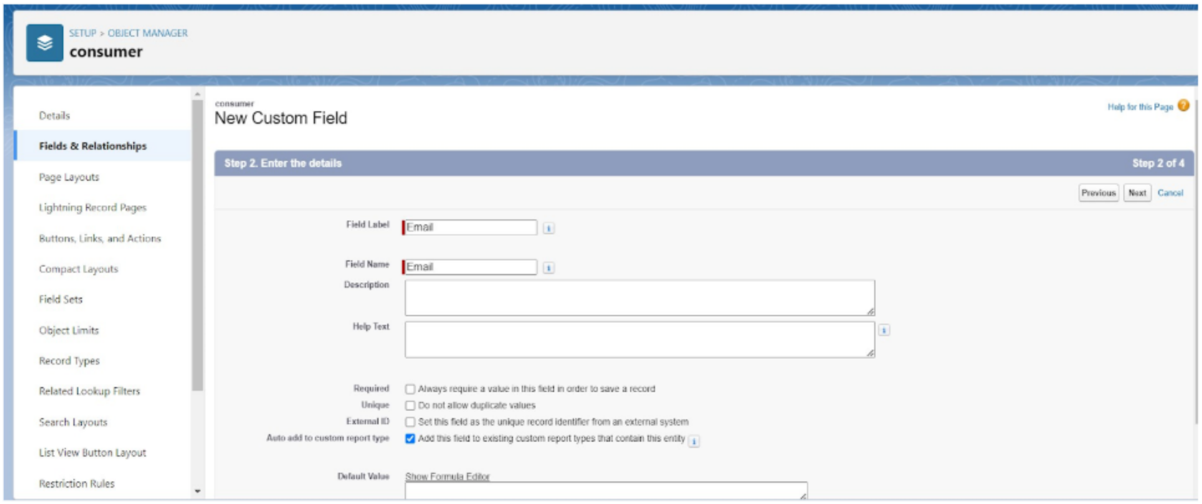
3. Select Data type as a “Email” and Click on Next

4. Fill the Above as following:

Field Label: Email

Field Name :It’s gets auto generated

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



consumer

New Custom Field

Step 2. Enter the details — Step 2 of 4

Field Label: Email

Field Name: Email

Description:

Help Text:

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

Unique: ☐ Do not allow duplicate values

External ID: ☐ Set this field as the unique record identifier from an external system

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

Default Value:

3. 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

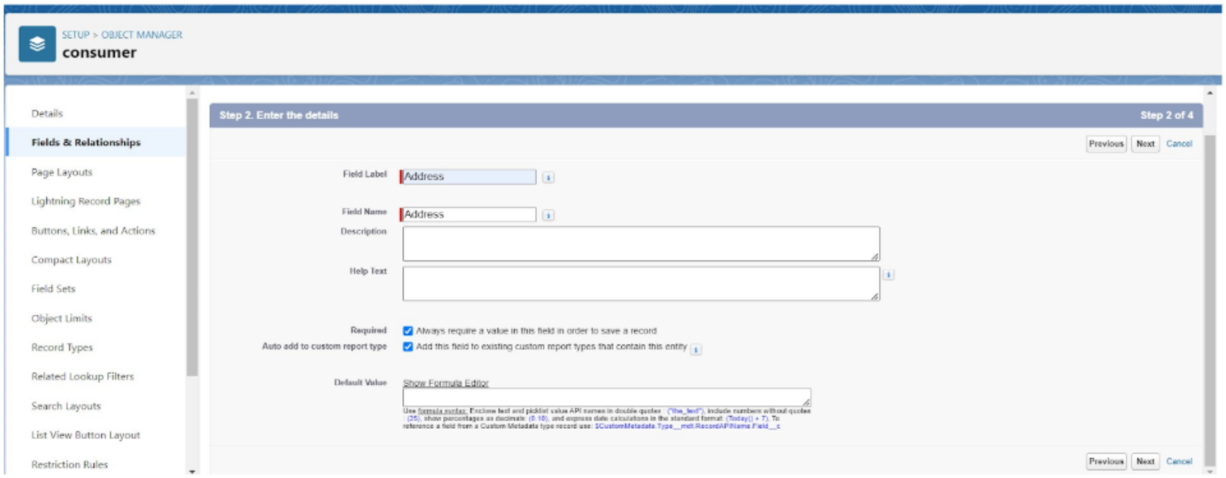
4. Fill the Above as following:

Field Label: Address

Field Name : It’s gets auto generated

Select Required field.

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



Step 2. Enter the details

Step 2 of 4

Field Label: Address

Field Name: Address

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:

Use formula syntax: Enclose text and picklist value API names in double quotes : ("the_text"), include numbers without quotes : (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: $CustomMetadata.Type__mdt.RecordAPIName.Field__c

4. 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

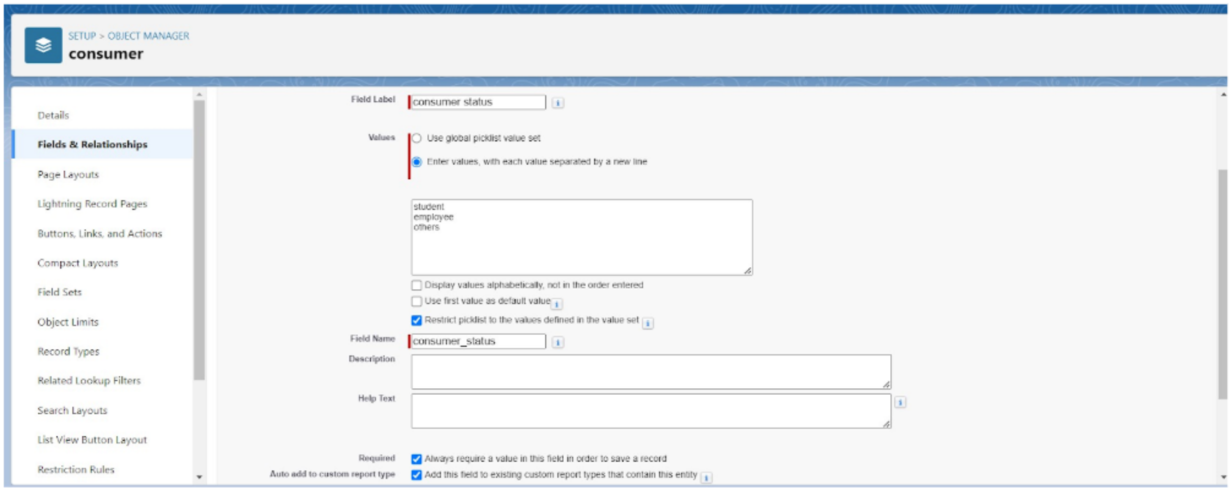
Employee

Others

Select required

Field Name :It’s gets auto generated

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



Field Label: consumer status

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

student
employee
others

☐ 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: consumer_status

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

Creating the field in Laptop Bookings Object

1. To create fields in an object:

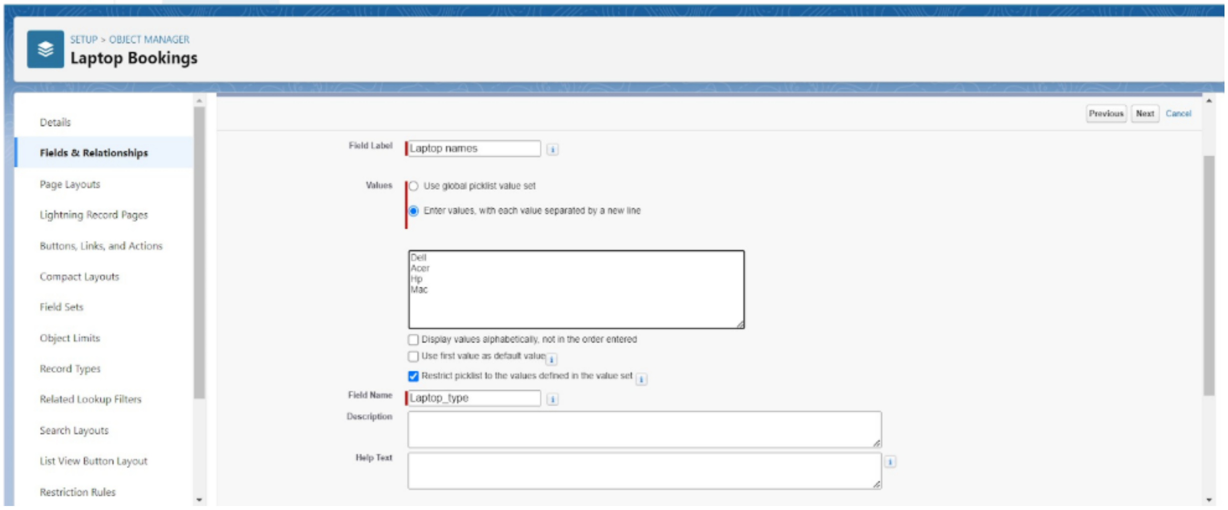
1. Go to setup >> click on Object Manager >> type object name(Laptop Booking) in the search bar >> click on the object.

2. Now click on “Fields & Relationships” >> New

3. Select Data Type as a “Picklist”

Label: Laptop Names

Picklist values are:-1.Dell 2. Acer 3.Hp 4.Mac



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:

4.Select required

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

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

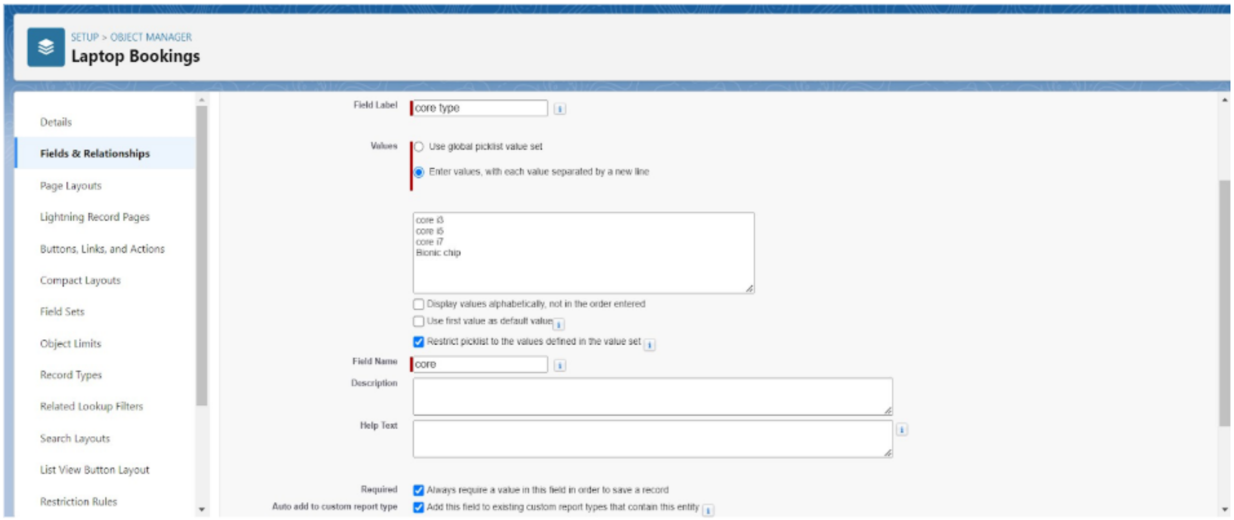
To create fields & relationship to an object:

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” and Label: Core Type

4.Picklist values are:-1.core i3   2. Core i5   3. Core i7 4.Bionic Chip



Field Label: core type

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

core i3
core i5
core i7
Bionic 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: core

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

3.To Create a Field Dependency in the Laptop Booking Object

To create field dependency to an object:

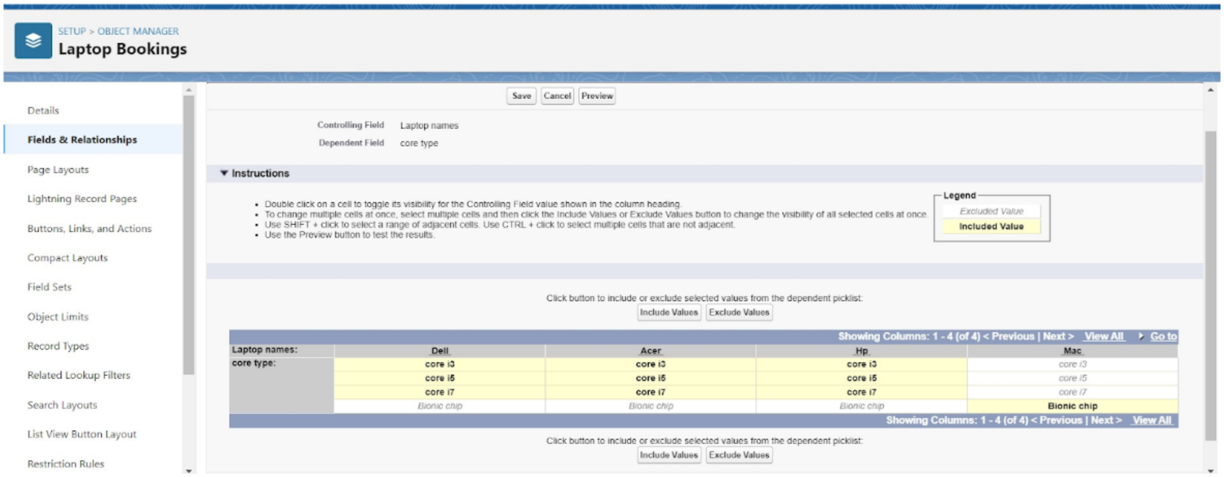
1.Go to setup >> click on Object Manager >> type object name(Laptop Booking) in the search bar >>   click on the object.

2.click field dependency and next

3. Select Controlling Field as Laptop Names and Dependent Field as Core Type

4. Click the include value for dell-core i3,i5,i7 and for acer i3,i5,i7 and for hp i3,i5,i7 and also for mac bionic chip include the values for it.

Click save.



Controlling Field: Laptop names

Dependent Field: core type

- Double click on a cell to toggle its visibility for the Controlling Field value shown in the column heading.
- To change multiple cells at once, select multiple cells and then click the Include Values or Exclude Values button to change the visibility of all selected cells at once.
- Use SHIFT + click to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent.
- Use the Preview button to test the results.

Click button to include or exclude selected values from the dependent picklist:

Laptop names:	Dell	Acer	Hp	Mac
core type:	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

Click button to include or exclude selected values from the dependent picklist:

To Create a Fields & Relationship to a Laptop Booking and Total Laptops Objects

1.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 “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.Fill the Above as following:

Change the Field Label: Consumer

Field Name :It’s gets auto generated

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

2.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

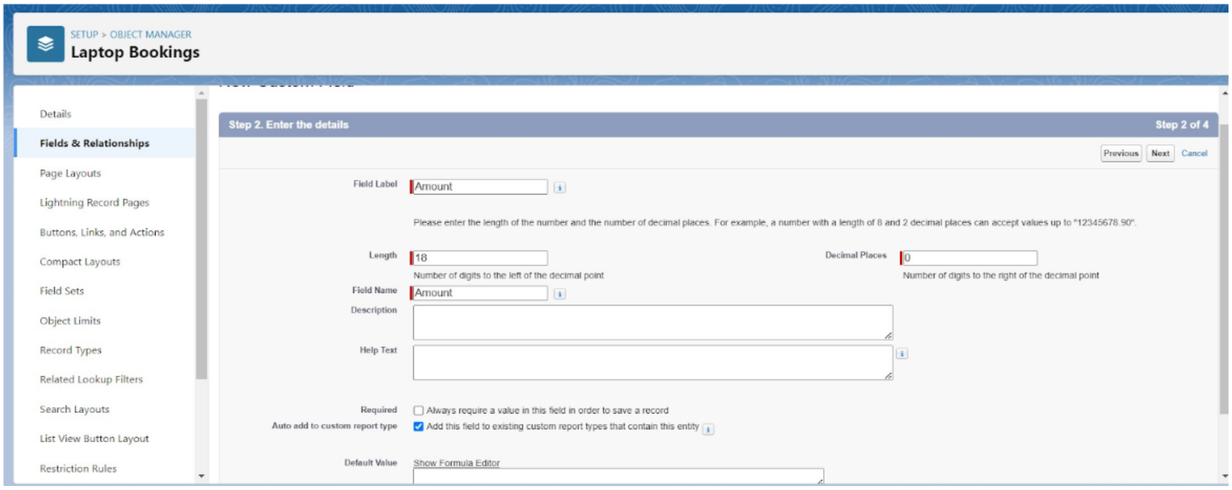
4.Select Data Type as a “Currency”

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 Step 2 of 4

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:

3.To Create a Fields & Relationship to an Object

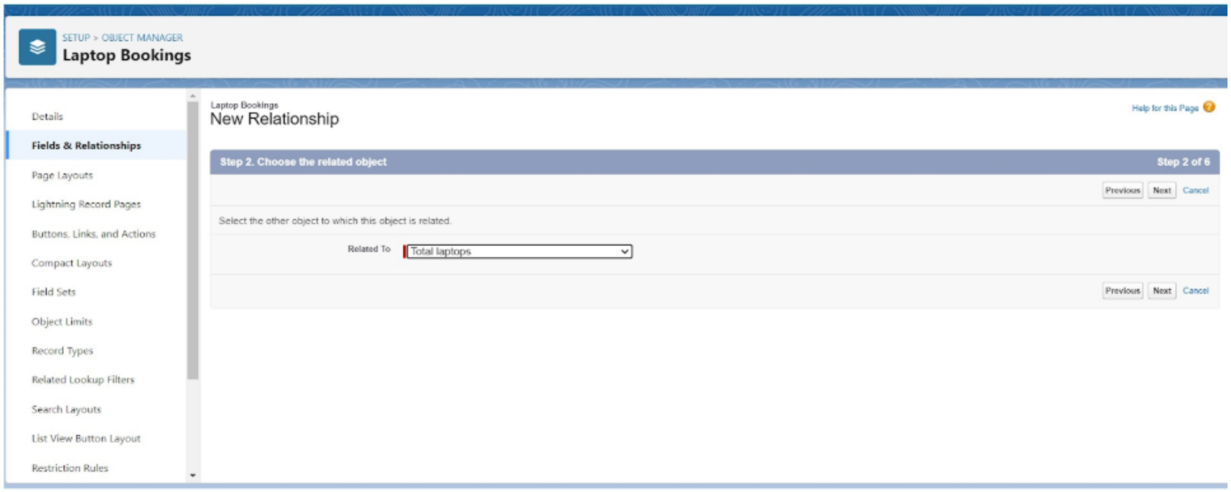
1.Go to setup >> click on Object Manager >> type object name(Laptop Booking) in the search bar >> click on the object.

2.Now click on “Fields & Relationships” >> New

3.Select Data Type as a “Lookup Relationship”

4.Click on Next

5.Click on the Related to drop down and Select the “Total Laptops” object and click on Next



Laptop Bookings

New Relationship

Step 2. Choose the related object — Step 2 of 6

Select the other object to which this object is related.

Related To: Total laptops

6.Fill the Above as following:

Change the Field Label: Total No Of Laptops, Field Name :It's gets auto generated

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

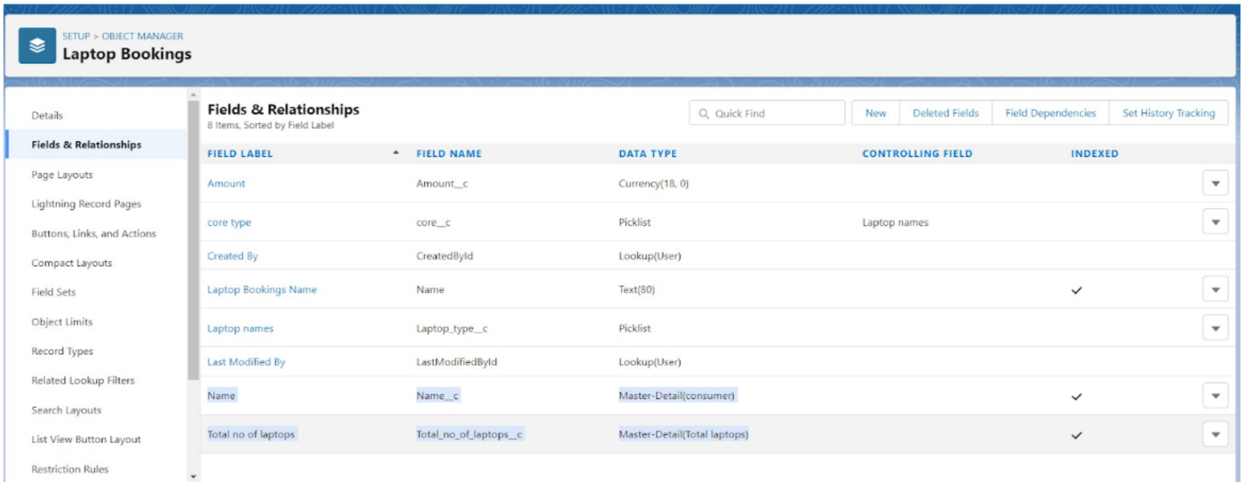
To Create a Fields & Relationship to an Laptop Booking Object

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", Click on Next and save it.



Fields & Relationships

8 Items, Sorted by Field Label

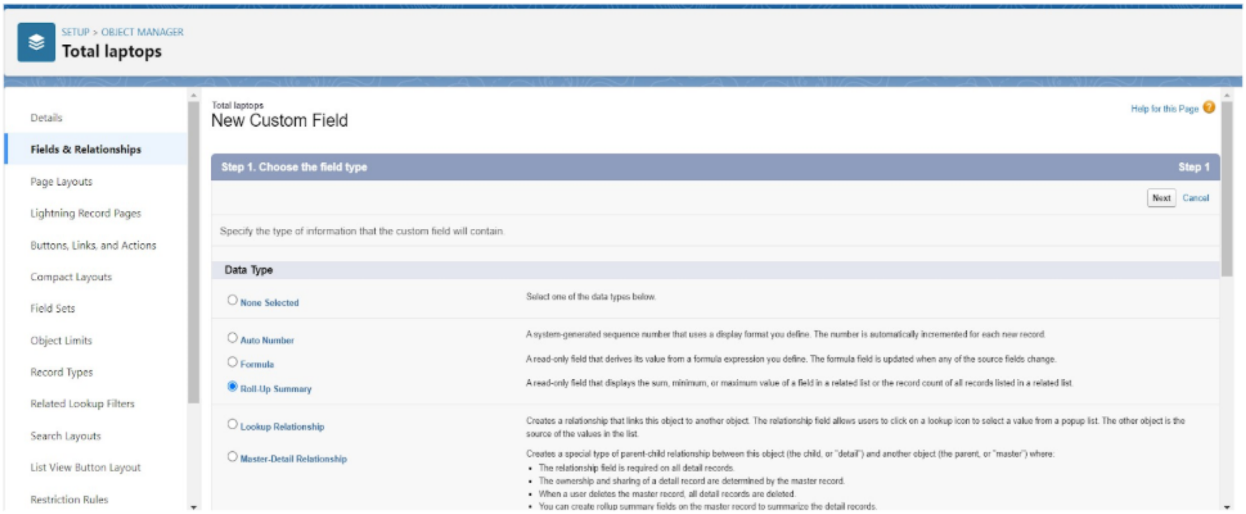
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Currency(18, 0)		
core type	core__c	Picklist	Laptop names	
Created By	CreatedById	Lookup(User)		
Laptop Bookings Name	Name	Text(80)		✓
Laptop names	Laptop_type__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Master-Detail(consumer)		✓
Total no of laptops	Total_no_of_laptops__c	Master-Detail(Total laptops)		✓

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

1.After Creating the Master-Detail 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



Total laptops
New Custom Field

Step 1. Choose the field type — Step 1

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.

○ Formula — A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

● 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.

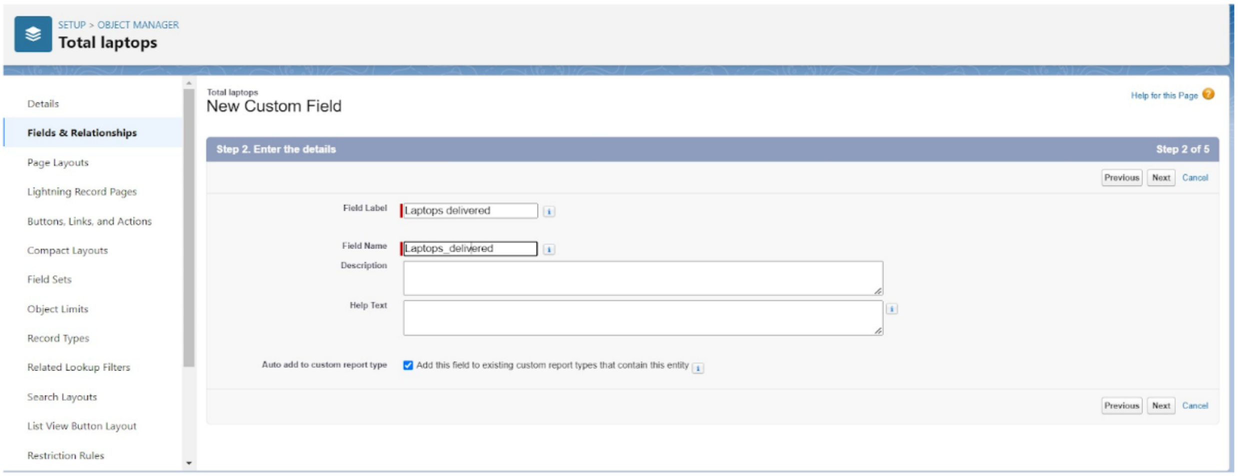
○ Lookup Relationship — Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

○ 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.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, Click on Next



Total laptops
New Custom Field

Step 2. Enter the details — Step 2 of 5

Field Label: Laptops delivered

Field Name: Laptops_delivered

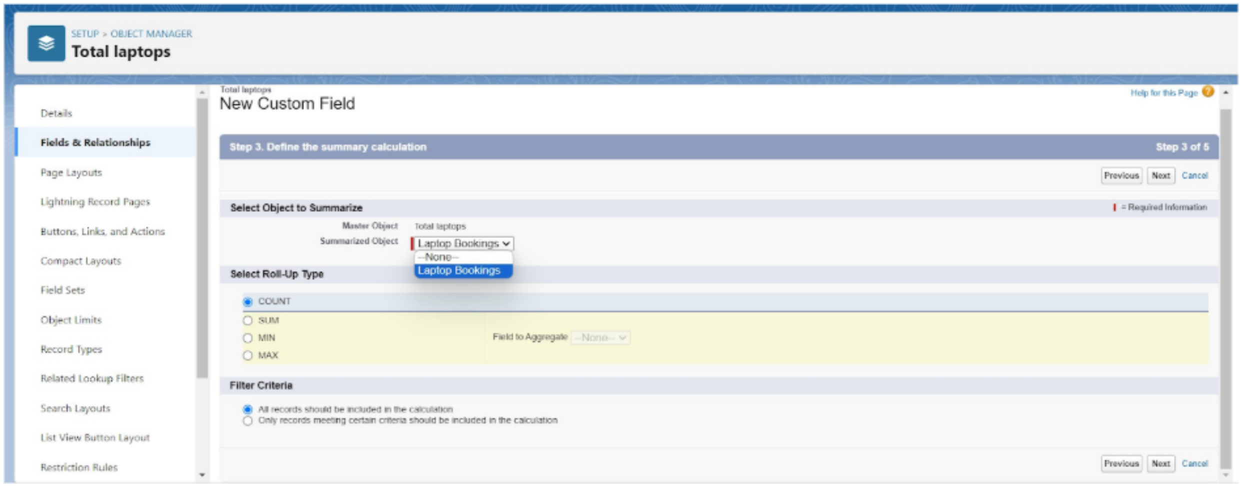
Description:

Help Text:

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

6.Select the Laptop Bookings in the Summarized Object

7.Select the count Radio button in the select Roll-up Type



Total laptops

New Custom Field

Step 3. Define the summary calculation

Step 3 of 5

Select Object to Summarize

| = Required Information

Master Object: Total laptops

Summarized Object: Laptop Bookings

Select Roll-Up Type

● COUNT

○ SUM

○ MIN

○ MAX

Field to Aggregate: --None--

Filter Criteria

● All records should be included in the calculation

○ Only records meeting certain criteria should be included in the calculation

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

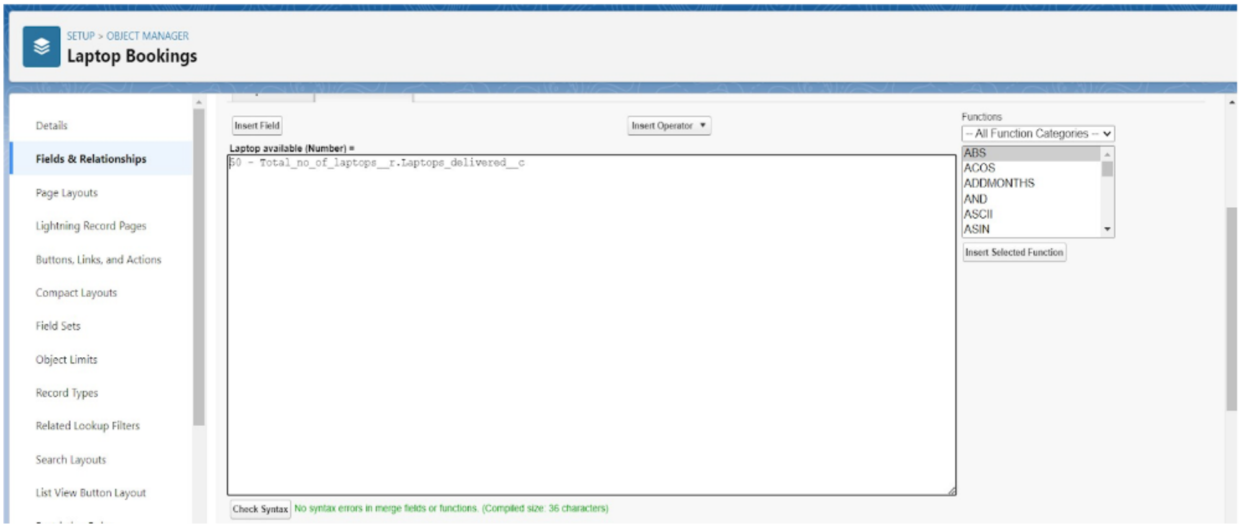
Field Name : It’s gets auto generated

5.Select the Formula Return Type as “Number”

6.Select the Decimal places as “0” and Click on Next

7.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



Laptop available (Number) =

```
50 - Total_no_of_laptops__r.Laptops_delivered__c
```

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

To create fields in an object:

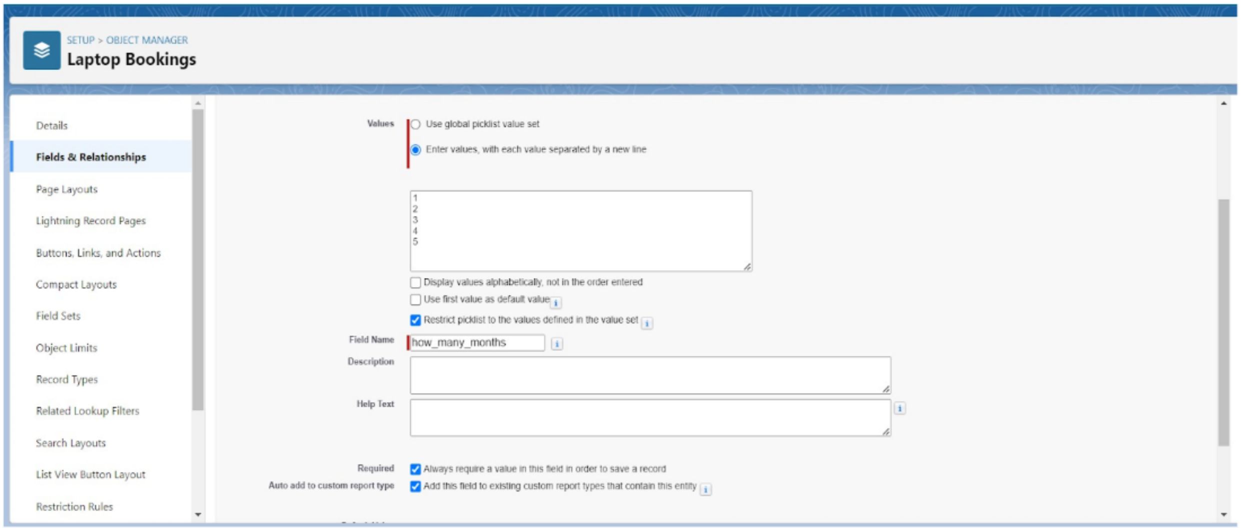
1.Go to setup >> click on Object Manager >> type object name(Laptop Booking) in the 2.search bar >> click on the object.

3.Now click on “Fields & Relationships” >>New

4.Select Data Type as a “picklist” and Label: how many months

Picklist values are 1.2.3.4.5

Click and save it.



Values ○ Use global picklist value set
● Enter values, with each value separated by a new line

1
2
3
4
5

☐ 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: how_many_months

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

Creation of Fields & Relationship for Billing Process

1.**To create fields & relationship to an object:**

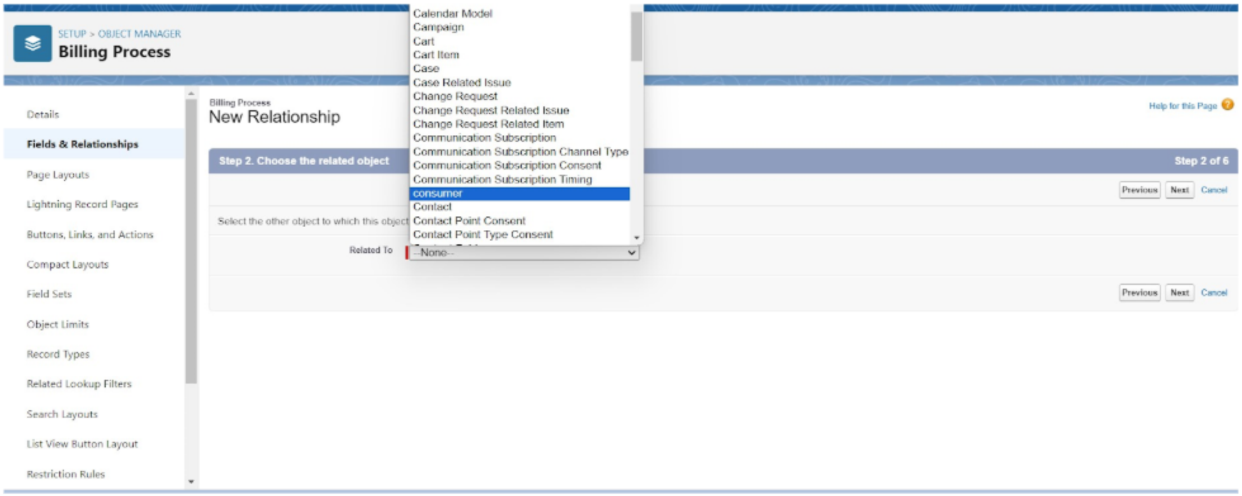
1.Go to setup >> click on Object Manager >> type object name(Billing Process) in the search bar >> click on the object.

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



Select the other object to which this object

Related To: --None--

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:**

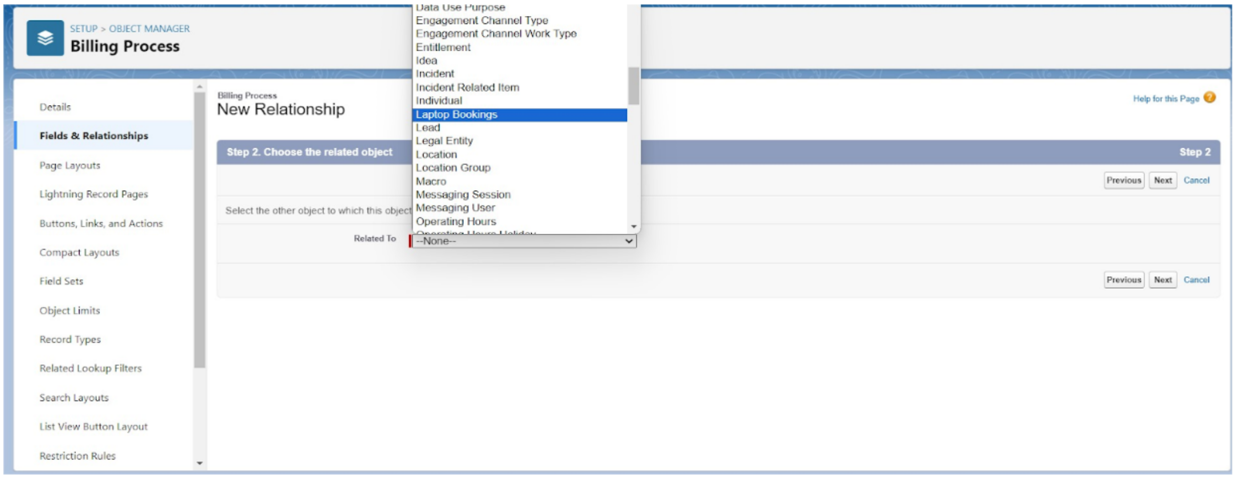
1.Go to setup >> click on Object Manager >> type object name(Billing Process) in the search bar >> click on the object.

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



Select the other object to which this object

Related To --None--

6.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

Cash

Check

Credit card

Debit card

UPI

Phonepe

Gpay

Paytm

Select required

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

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”

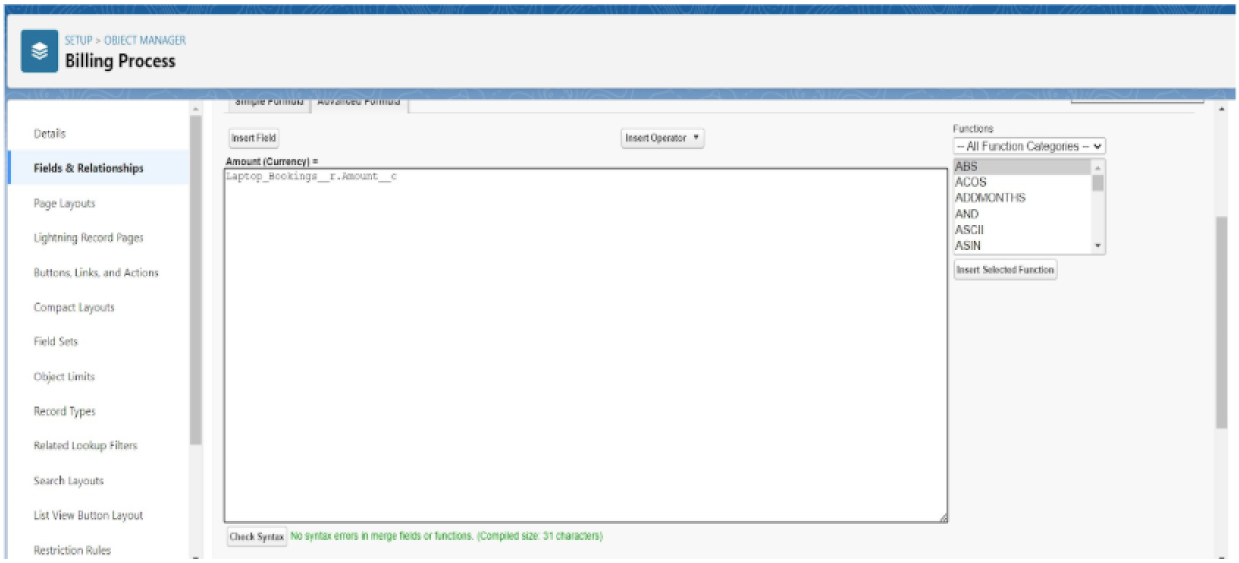
4.Click on Next

5.Enter the Field label: Amount, the Field name gets auto generated and click on Next.(Formula return type Currency).

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 “ Laptop_Booking__r.Amount__c ”.

7.Click on the Check syntax: No syntax errors in merge fields

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



Amount (Currency) =

```
Laptop_Bookings__r.Amount__c
```

No syntax errors in merge fields or functions. (Compiled size: 31 characters)

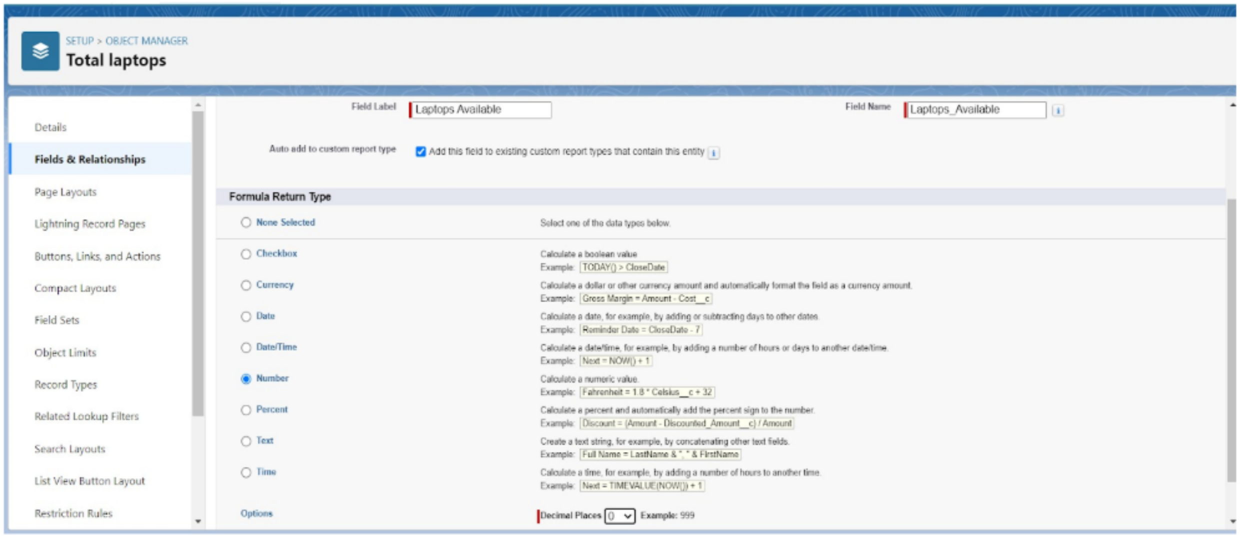
Creating the field in Total Laptops object

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, Select Data type as a “Formula” and Click on Next. Field Label: Laptops Available, Field Name : It’s gets auto generated

3.Select the Formula Return Type as “Number”,Select the Decimal places as “0” and Click on Next



Field Label: Laptops Available

Field Name: Laptops_Available

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

○ None Selected — Select one of the data types below.

○ Checkbox — Calculate a boolean value. Example: TODAY() > CloseDate

○ Currency — Calculate a dollar or other currency amount and automatically format the field as a currency amount. Example: Gross Margin = Amount - Cost__c

○ Date — Calculate a date, for example, by adding or subtracting days to other dates. Example: Reminder Date = CloseDate - 7

○ Date/Time — Calculate a date/time, for example, by adding a number of hours or days to another date/time. Example: Next = NOW() + 1

● Number — Calculate a numeric value. Example: Fahrenheit = 1.8 * Celsius__c + 32

○ Percent — Calculate a percent and automatically add the percent sign to the number. Example: Discount = (Amount - Discounted_Amount__c) / Amount

○ Text — Create a text string, for example, by concatenating other text fields. Example: Full Name = LastName & ", " & FirstName

○ Time — Calculate a time, for example, by adding a number of hours to another time. Example: Next = TIMEVALUE(NOW()) + 1

Decimal Places: 0 Example: 999

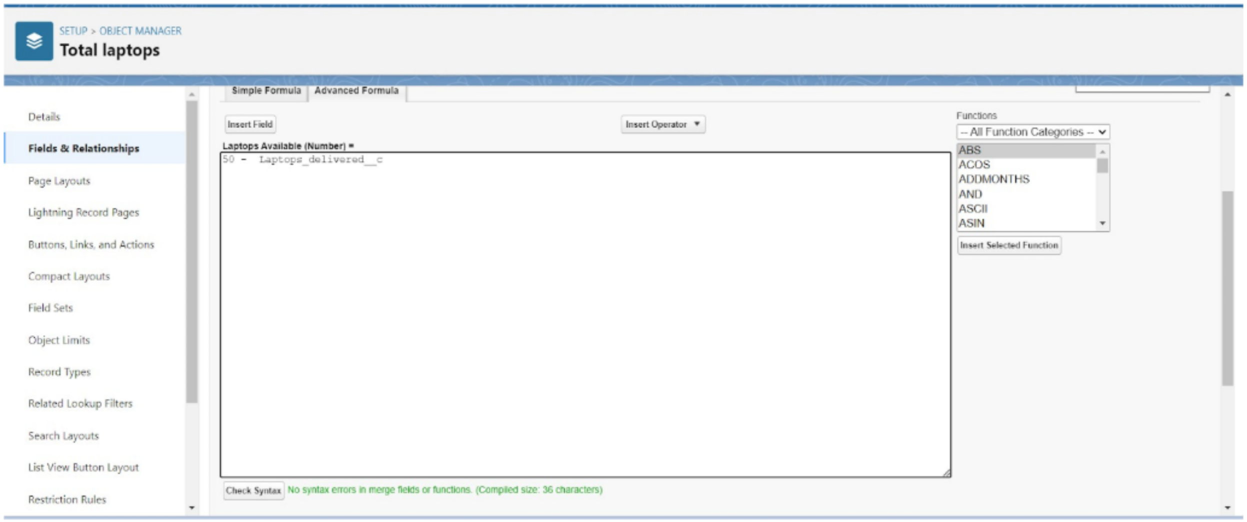
Note: I am Considering “Total No Of Laptops = 50” While creating a new record in Total

Laptops Object.

Click on the Advanced

Formula “ 50 - Laptops_delivered__c ” and Check Syntax

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



Laptops Available (Number) =

```
50 -  Laptops_delivered__c
```

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

Validation Rule

Creating the validation rule for phone number field in customer 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.

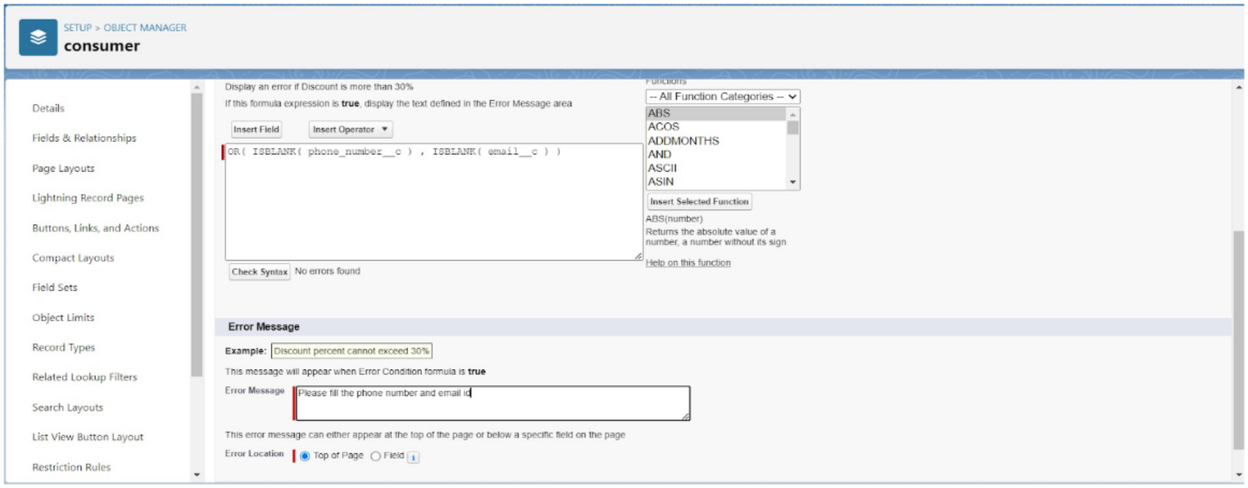
2.Click on the validation rule >> click New.

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.Save the validation rule.



Display an error if Discount is more than 30%

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

```
OR( ISBLANK( phone_number__c ) , ISBLANK( email__c ) )
```

No errors found

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

Error Message

Example: Discount percent cannot exceed 30%

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

Error Message: Please fill the phone number and email id

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

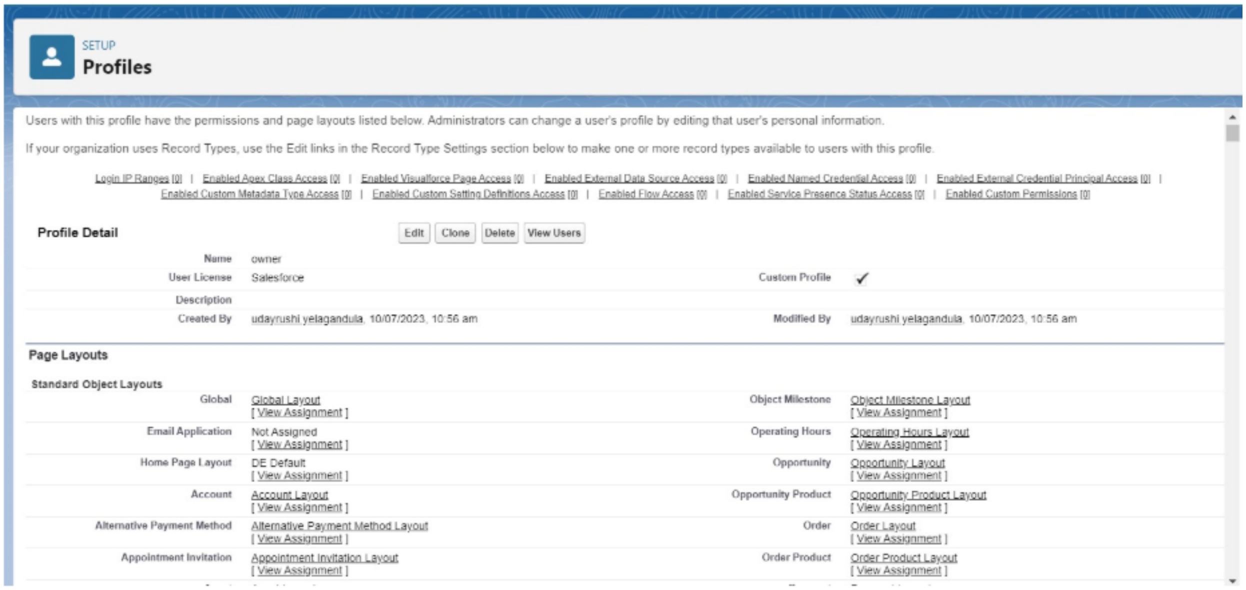
Error Location: ● Top of Page ○ Field

Profiles

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.



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.

Profile Detail

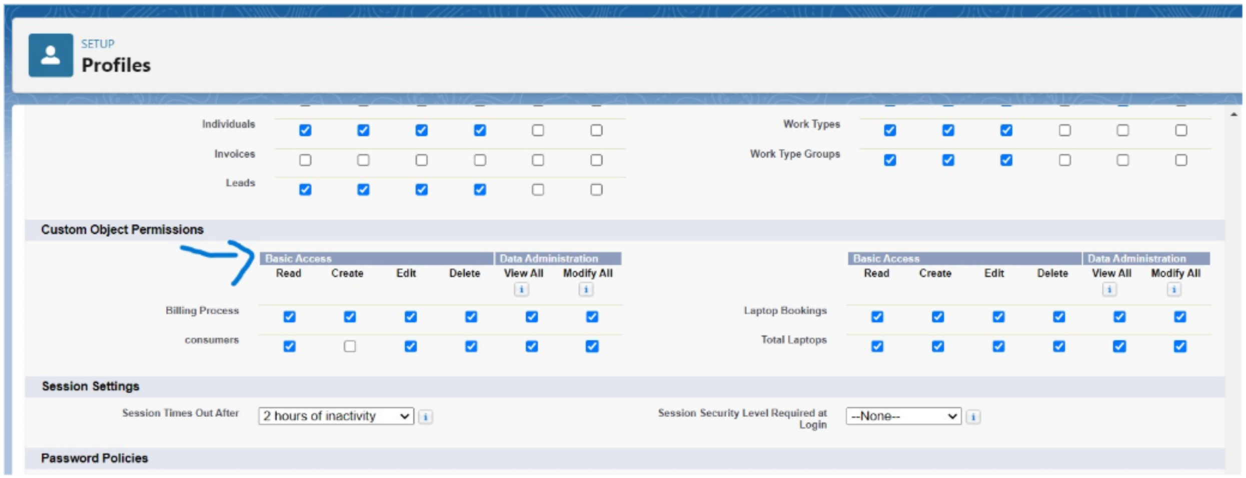
Name	owner		
User License	Salesforce	Custom Profile	✓
Description			
Created By	udayrushi yelagandula, 10/07/2023, 10:56 am	Modified By	udayrushi yelagandula, 10/07/2023, 10:56 am

Page Layouts

Standard Object Layouts

Global	Global Layout [View Assignment]	Object Milestone	Object Milestone Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Operating Hours	Operating Hours Layout [View Assignment]
Home Page Layout	DE Default [View Assignment]	Opportunity	Opportunity Layout [View Assignment]
Account	Account Layout [View Assignment]	Opportunity Product	Opportunity Product Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Order	Order Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]	Order Product	Order Product Layout [View Assignment]

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.



SETUP

Profiles

	Read	Create	Edit	Delete	View All	Modify All
Individuals	☑	☑	☑	☑	☐	☐
Invoices	☐	☐	☐	☐	☐	☐
Leads	☑	☑	☑	☑	☐	☐
Work Types	☑	☑	☑	☐	☐	☐
Work Type Groups	☑	☑	☑	☐	☐	☐

Custom Object Permissions

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Billing Process	☑	☑	☑	☑	☑	☑
consumers	☑	☐	☑	☑	☑	☑
Laptop Bookings	☑	☑	☑	☑	☑	☑
Total Laptops	☑	☑	☑	☑	☑	☑

Session Settings

Session Times Out After: 2 hours of inactivity

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

Password Policies

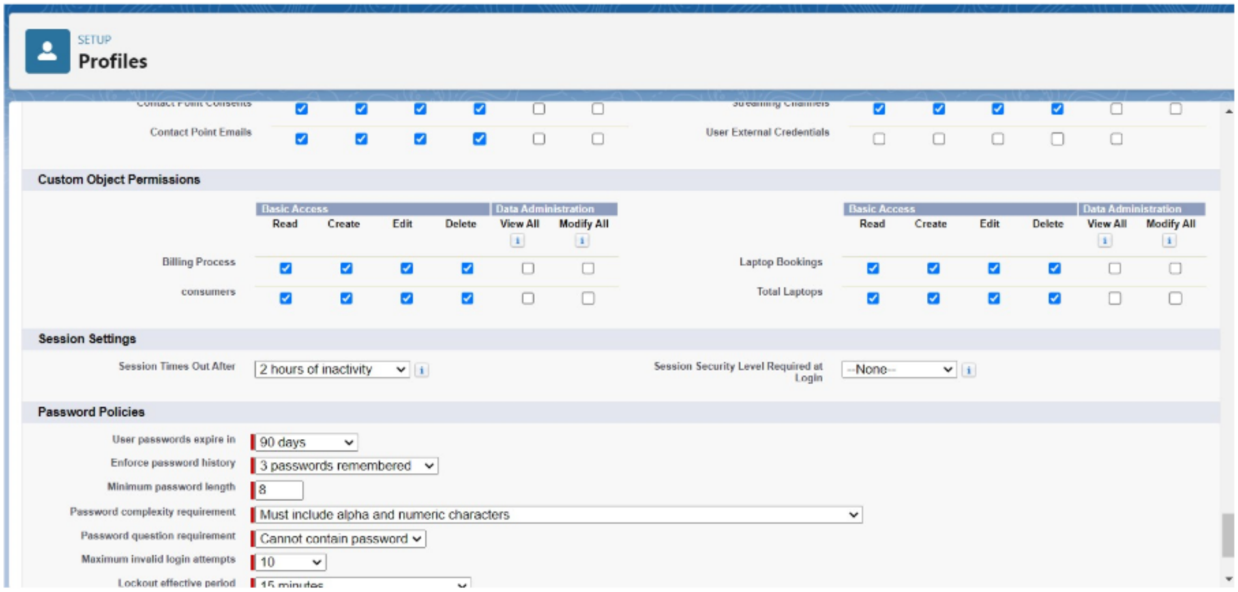
3.Give Access and Save it.

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

	Read	Create	Edit	Delete	View All	Modify All
Contact Point Emails	☑	☑	☑	☑	☐	☐
User External Credentials	☐	☐	☐	☐	☐	

Custom Object Permissions

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Billing Process	☑	☑	☑	☑	☐	☐
consumers	☑	☑	☑	☑	☐	☐
Laptop Bookings	☑	☑	☑	☑	☐	☐
Total Laptops	☑	☑	☑	☑	☐	☐

Session Settings

Session Times Out After: 2 hours of inactivity

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

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Lockout effective period: 15 minutes

4.Give access and save it.

Roles and Hierarchy

Creating Owner Role

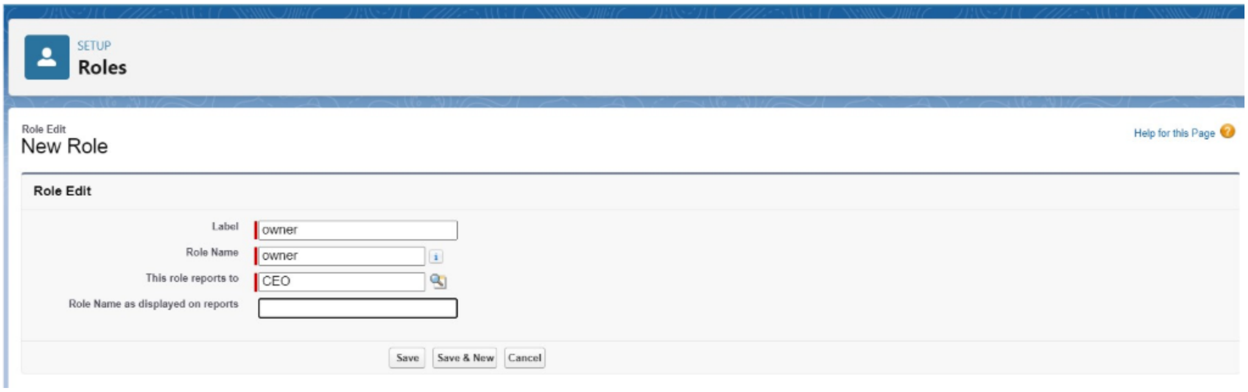
Creating owner Role:

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.

4.Click and Save it.



Label: owner
Role Name: owner
This role reports to: CEO
Role Name as displayed on reports:

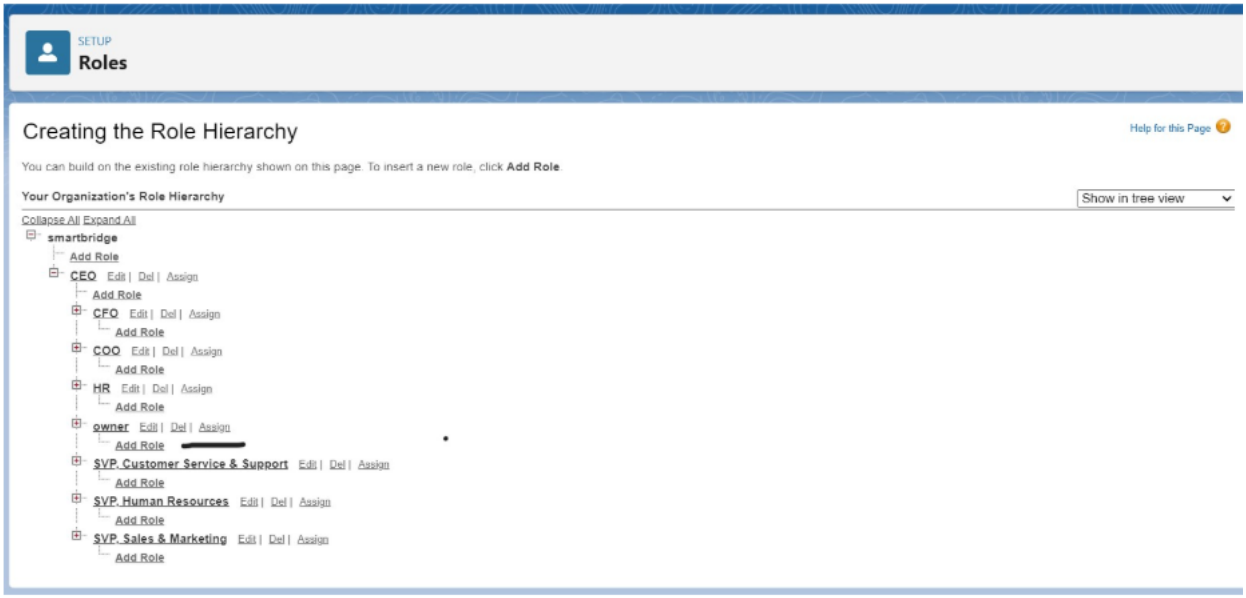
Creating Agent Role

Creating another two roles under Owner

1.Go to quick find - Search for Roles - click on set up roles.

2.Click plus on CEO role, and click add role under owner.

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



Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

Your Organization's Role Hierarchy

Collapse All Expand All

- smartbridge
  - Add Role
  - CEO Edit | Del | Assign
    - Add Role
    - CFO Edit | Del | Assign
      - Add Role
    - COO Edit | Del | Assign
      - Add Role
    - HR Edit | Del | Assign
      - Add Role
    - owner Edit | Del | Assign
      - Add Role
    - SVP, Customer Service & Support Edit | Del | Assign
      - Add Role
    - SVP, Human Resources Edit | Del | Assign
      - Add Role
    - SVP, Sales & Marketing Edit | Del | Assign
      - Add Role

Users

Create 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 : 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

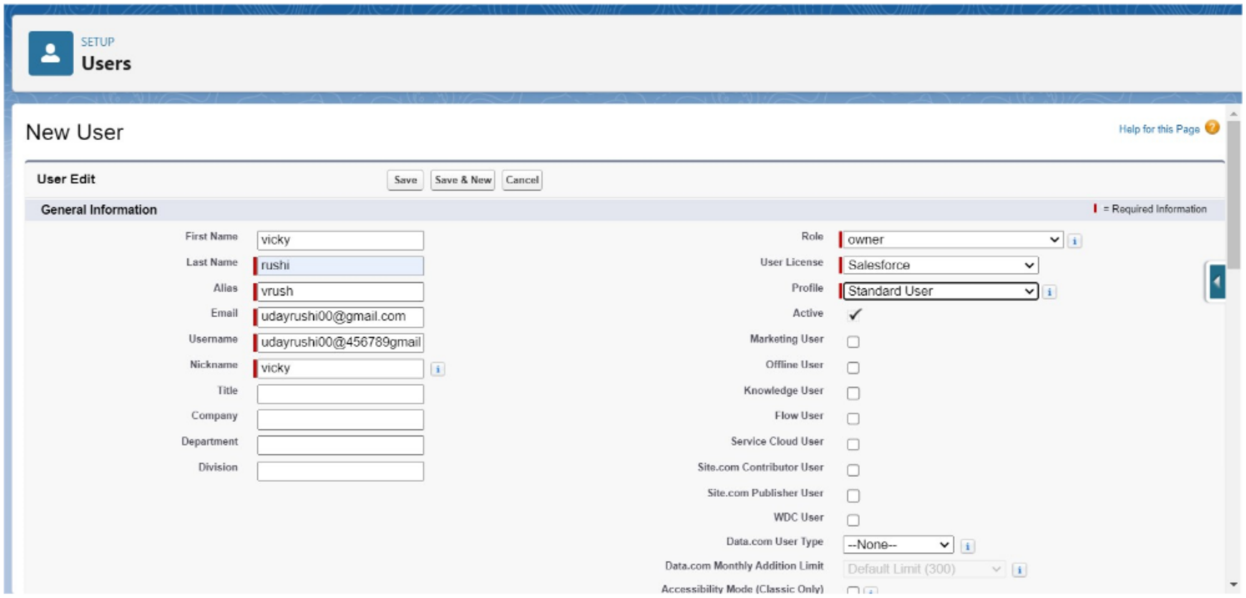
8.Nick Name : Give a Nickname

9.Role : owner

10.User license : Salesforce

11.Profiles : owner

12.Save it



First Name: vicky

Last Name: rushi

Alias: vrush

Email: udayrushi00@gmail.com

Username: udayrushi00@456789gmail

Nickname: vicky

Title:

Company:

Department:

Division:

Role: owner

User License: Salesforce

Profile: Standard User

Active: ✓

Marketing User: ☐

Offline User: ☐

Knowledge User: ☐

Flow User: ☐

Service Cloud User: ☐

Site.com Contributor User: ☐

Site.com Publisher User: ☐

WDC User: ☐

Data.com User Type: --None--

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

Accessibility Mode (Classic Only): ☐

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

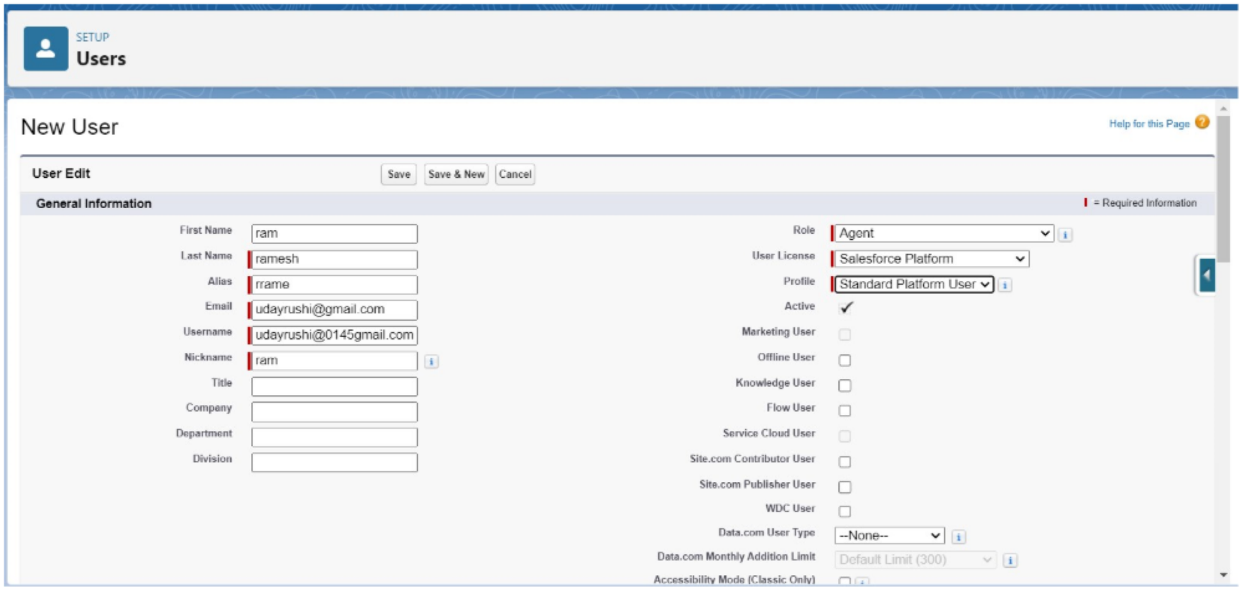
8.Nick Name : Give a Nickname

9.Role : Agent

10.User license : Salesforce platform

11.Profiles : Agent.

12.Save it.



New User

User Edit

General Information

= Required Information

First Name: ram
Last Name: ramesh
Alias: rrame
Email: udayrushi@gmail.com
Username: udayrushi@0145gmail.com
Nickname: ram
Title:
Company:
Department:
Division:

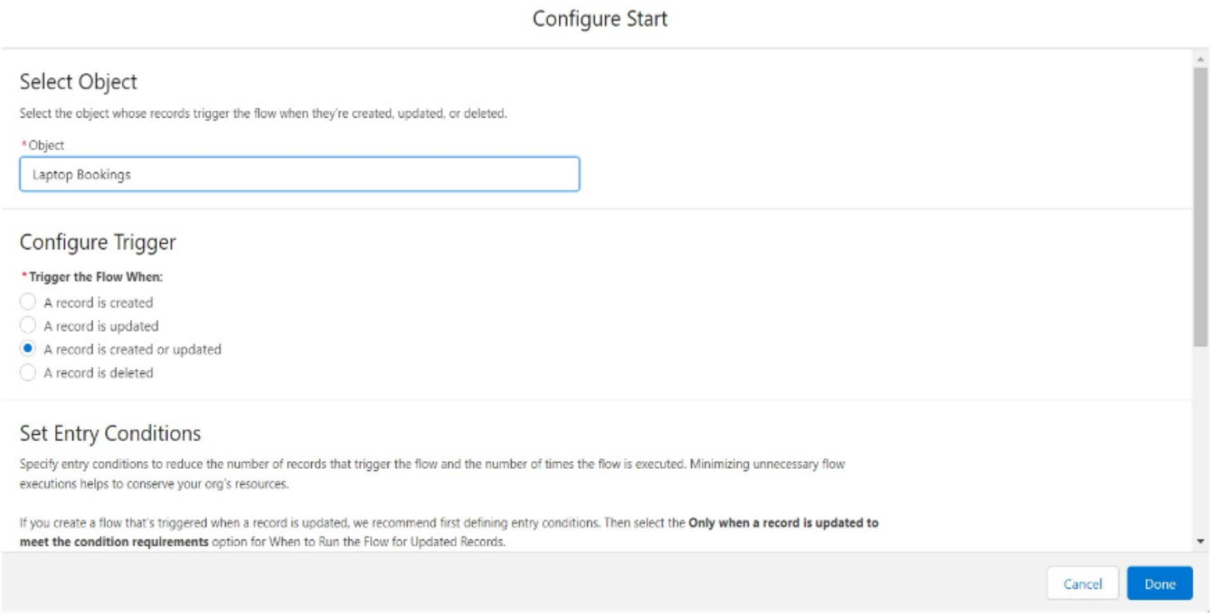
Role: Agent
User License: Salesforce Platform
Profile: Standard Platform User
Active: ✓
Marketing User: ☐
Offline User: ☐
Knowledge User: ☐
Flow User: ☐
Service Cloud User: ☐
Site.com Contributor User: ☐
Site.com Publisher User: ☐
WDC User: ☐
Data.com User Type: --None--
Data.com Monthly Addition Limit: Default Limit (300)
Accessibility Mode (Classic Only): ☐

Flows

Create a Flow on dell laptop

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. Select the Object as a Laptop Booking in the Drop down list. Select the Trigger Flow when: “A record is Created or Updated”.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

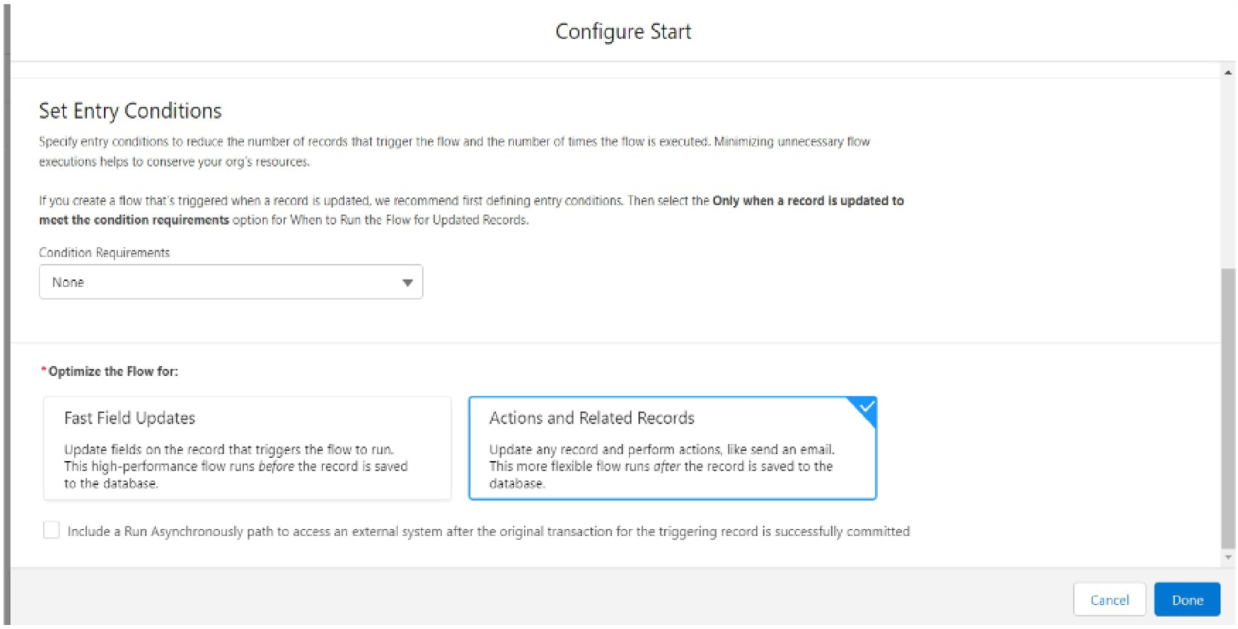
***Trigger the Flow When:**

○ 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.


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

3.Under the Record-triggered Flow Click on “+” Symbol and In the Drop down List select the “Decision Element”.

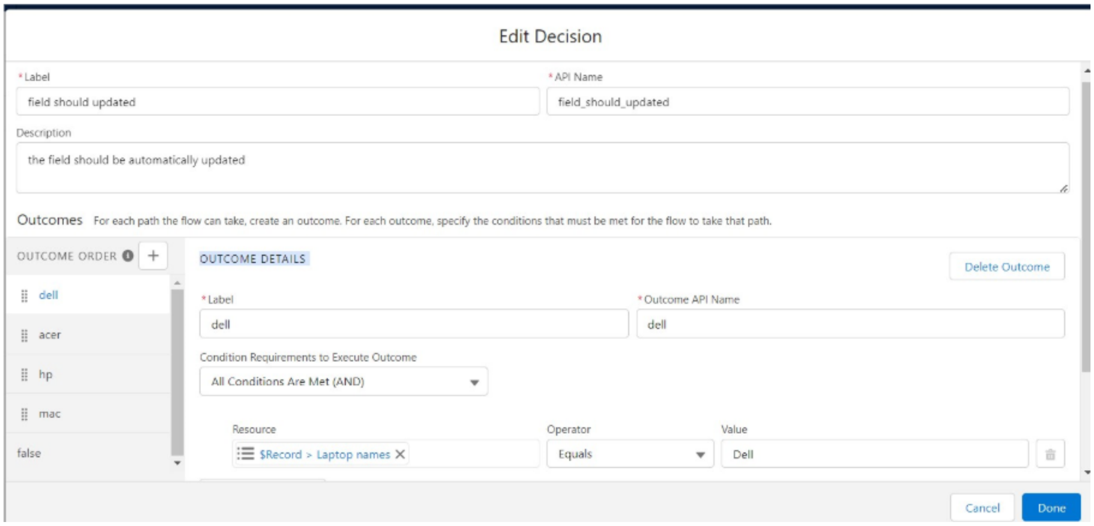
4.Enter the Details Label: Field should be Update, API name: Gets Automatically Generated.

5.Enter the Outcome Details Label: dell , Outcome API name: Gets Automatically Generated.

6.Resource: Select $Record.Laptop_name__c., Operator: Select Equals., Value: Select dell

7.Add the same outcome order to acer , hp, mac.

8.Rename Default outcome as False, Click done.


Edit Decision

*Label: field should updated

*API Name: 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
- dell
- acer
- hp
- mac
- false

OUTCOME DETAILS

*Label: dell

*Outcome API Name: dell

Condition Requirements to Execute Outcome: All Conditions Are Met (AND)

Resource	Operator	Value
$Record > Laptop names	Equals	Dell

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

10.Again select decision

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

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

13.Resource: Select {!$Record.core_type__c}., Operator: Select Equals., Value: Select core i3.

14.Then again click the symbol '+' outcome details

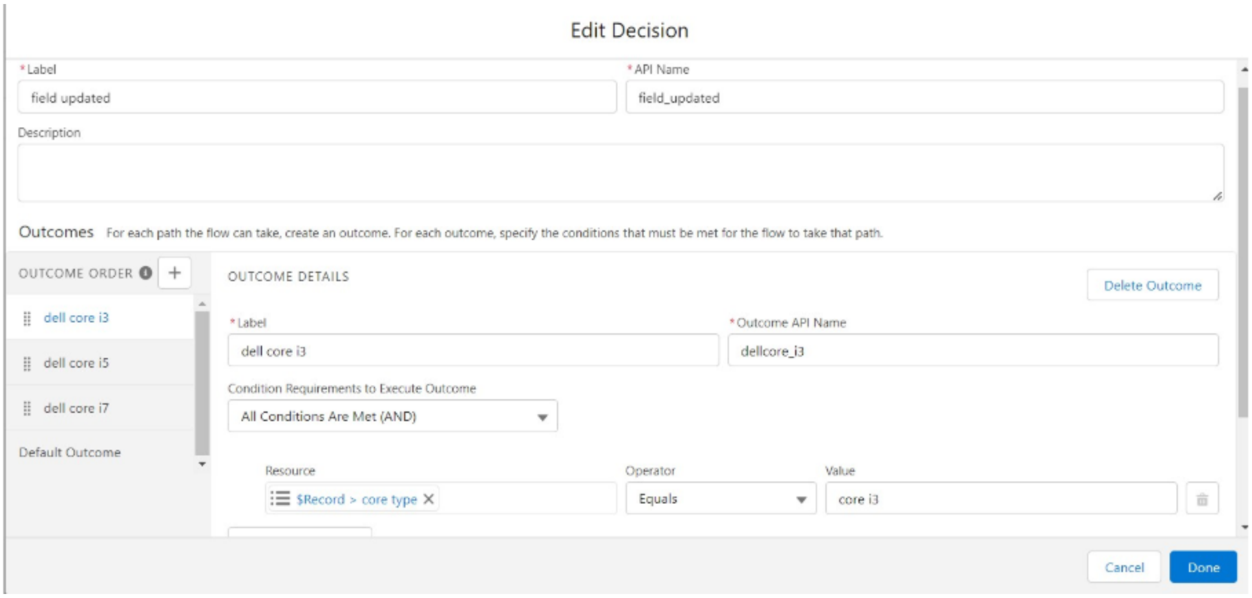
15.select the Outcome '+' Details Label: dell core i5 , Outcome API name: Gets Automatically Generated.

16.Resource: Select Record.core type., Operator: Select Equals., Value: Select core i5.

17.Then again click the symbol'+' outcome details

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

19.Resource: Select Record.core type., Operator: Select Equals., Value: Select core i7.Click done.


Edit Decision

*Label: field updated
*API Name: field_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 DETAILS
*Label: dell core i3
*Outcome API Name: dellcore_i3
Condition Requirements to Execute Outcome: All Conditions Are Met (AND)
Resource: $Record > core type
Operator: Equals
Value: core i3

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

21.Enter the Details Label: months selected , API name: Gets Automatically Generated.

22.Enter the Outcome Details Label: dell 1(i3) , Outcome API name: Gets Automatically Generated.

23.Resource: Select Record.how many months., Operator: Select Equals., Value: 1.

24.Enter the Outcome Details Label: dell 2(i3) , Outcome API name: Gets Automatically Generated.

25.Resource: Select Record.how many months., Operator: Select Equals., Value: Select 2..

26.Click ‘+’ outcome details

27.Enter the Outcome Details Label: dell 3(i3) , Outcome API name: Gets Automatically Generated.

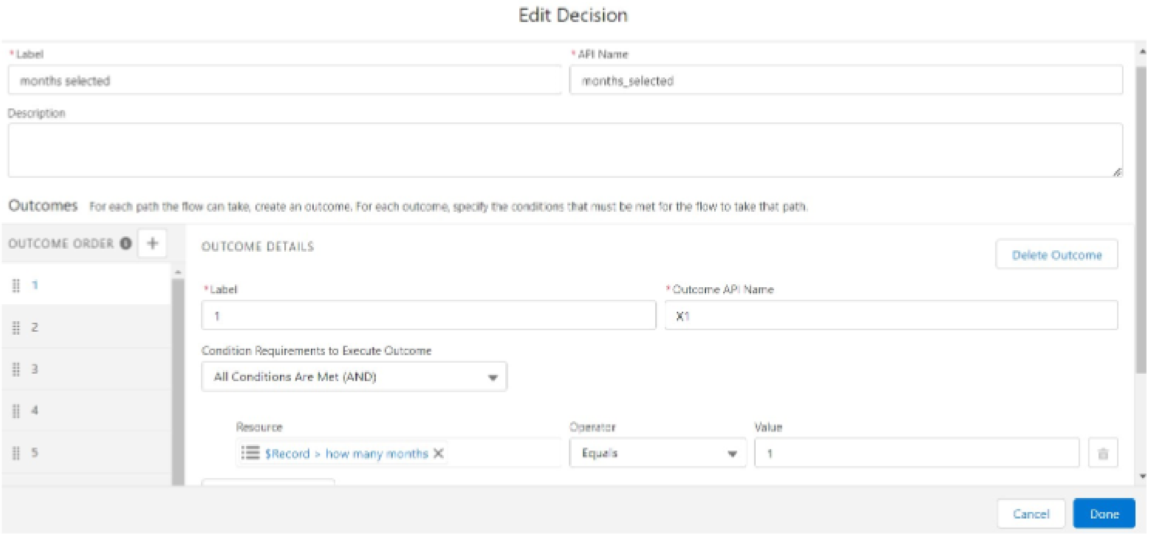
28.Resource: Select Record.how many months., Operator: Select Equals., Value: Select 3..

29.Click ‘+’ outcome details. Enter the Outcome Details Label: dell 4(i3) , Outcome API name: Gets Automatically Generated.

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

32.Click ‘+’ outcome details. Enter the Outcome Details Label: dell 5(i3) , Outcome API name: Gets Automatically Generated.

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


Edit Decision

*Label: months selected

*API Name: 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.

*Label: 1

*Outcome API Name: X1

Condition Requirements to Execute Outcome: All Conditions Are Met (AND)

Resource	Operator	Value
$Record > how many months	Equals	1

Follow the above picture you will understand.

34.After dell 1(i3) there is ‘+’ symbol like dell 2(i3),dell 3(i3),dell 4(i3),dell 5(i3).

35.Click on ‘+’ then select update records for each and every outcome.

36.Enter the Details Label: one month of dell i3 rate , API name: Gets Automatically Generated.
37.Enter label name in a similar way for other update records.

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 all these finally and update the Amount field value based on the number of months. Click done.

38.Enter the Details Label: months selected , API name: Gets Automatically Generated.

39.Enter the Outcome Details Label: dell 1(i7) , Outcome API name: Gets Automatically Generated.

40.Resource: Select Record.how many months., Operator: Select Equals., Value: 1.

41.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.

42.Click ‘+’ outcome details. Enter the Outcome Details Label: dell 3(i7) , Outcome API name: Gets Automatically Generated.

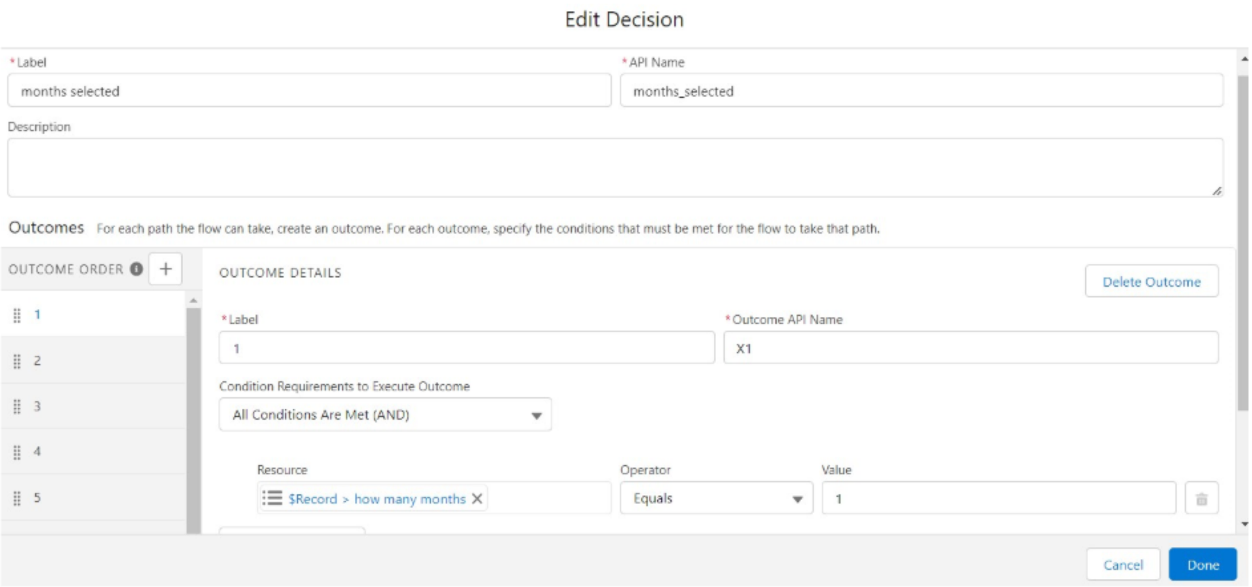
43.Resource: Select Record.how many months., Operator: Select Equals.,Value: Select 3.

44.Click ‘+’ outcome details. Enter the Outcome Details Label: dell 4(i7) , Outcome API name: Gets Automatically Generated.

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

46.Click ‘+’ outcome details. Enter the Outcome Details Label: dell 5(i7) , Outcome API name: Gets Automatically Generated.

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



Edit Decision

*Label: months selected

*API Name: 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.

*Label: 1

*Outcome API Name: X1

Condition Requirements to Execute Outcome: All Conditions Are Met (AND)

Resource	Operator	Value
$Record > how many months	Equals	1

Follow the above picture you will understand.

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

49.Click on '+' then select update records . Enter the Details Label: one month of dell i5 rate , API name: Gets Automatically Generated.

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 . Click done.

Follow the same steps for Dell i5 and update the Amount for each month (1,2,3,4,5) as 1500, 2500,3500,4500,5500 respectively.

Creating a Flow on Acer laptop

1.Go to flow page

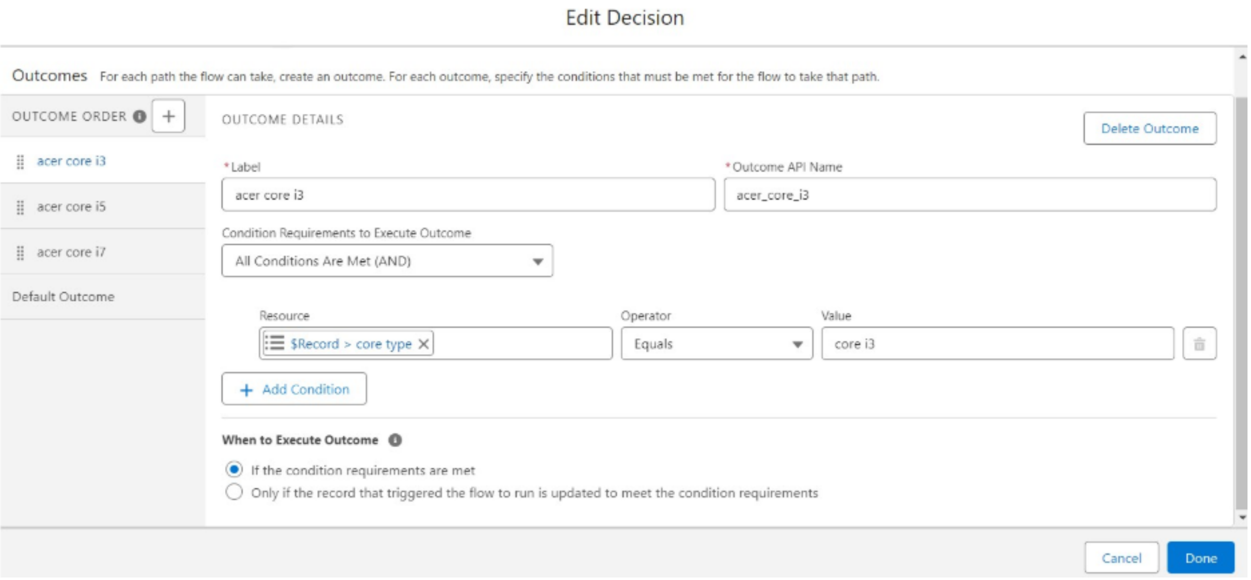
2.Beside acer there is a symbol '+' click on that.Again select decision.

3.Enter the Details Label: Acer core type selection, API name: Gets Automatically Generated.

4.Select the Outcome Details Label: acer core i3 , Outcome API name: Gets Automatically Generated.

5.Resource: Select Record.core type., Operator: Select Equals., Value: Select core i3.

6.Similarly create outcomes for acer core i5 and acer core i7 also. Click done.



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

- acer core i3
- acer core i5
- acer core i7
- Default Outcome

OUTCOME DETAILS

*Label: acer core i3

*Outcome API Name: acer_core_i3

Condition Requirements to Execute Outcome: All Conditions Are Met (AND)

Resource	Operator	Value
$Record > core type	Equals	core i3

When to Execute Outcome

● If the condition requirements are met

○ Only if the record that triggered the flow to run is updated to meet the condition requirements

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

8.Again select decision. Enter the Details Label: Acer months selected , API name: Gets Automatically Generated.

9.Enter the Outcome Details Label: acer 1(i3) , Outcome API name: Gets Automatically Generated.

10.Resource: Select Record.how many months., Operator: Select Equals., Value: 1.

11.Enter the Outcome Details Label: acer 2(i3) , Outcome API name: Gets Automatically Generated.

12.Resource: Select Record.how many months., Operator: Select Equals., Value: Select 2.

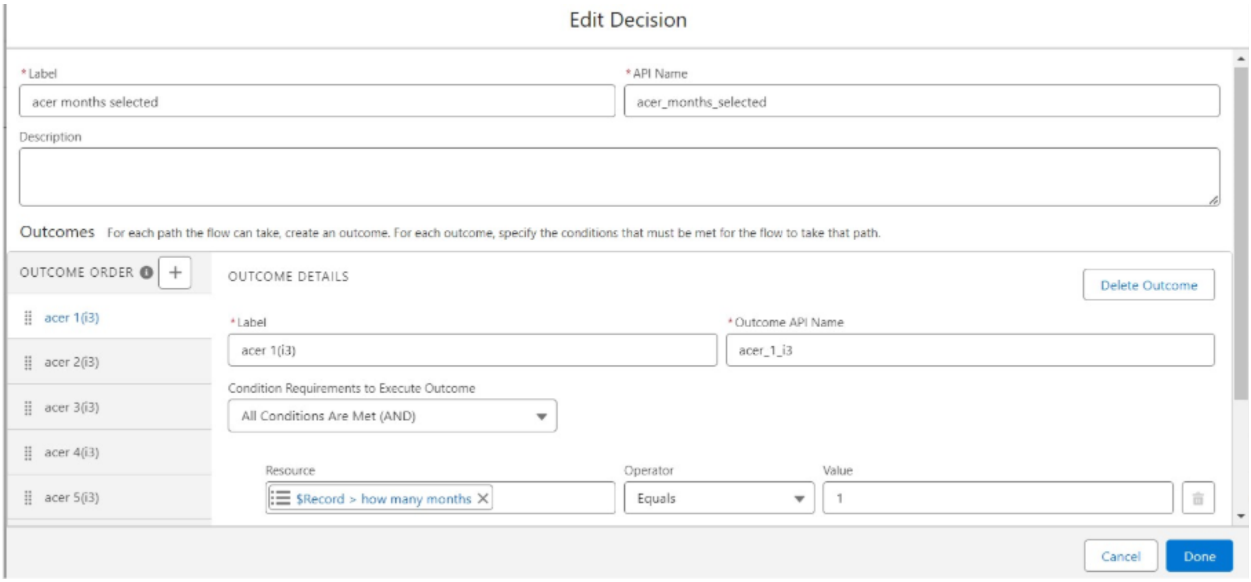
13.Click ‘+’ outcome details. Enter the Outcome Details Label: acer 3(i3) , Outcome API name: Gets Automatically Generated.

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

15.Click ‘+’ outcome details. Enter the Outcome Details Label: acer 4(i3) , Outcome API name: Gets Automatically Generated.

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

17.Click ‘+’ outcome details. 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 5. Click done.


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

- acer 1(i3)
- acer 2(i3)
- acer 3(i3)
- acer 4(i3)
- acer 5(i3)

OUTCOME DETAILS

*Label: acer 1(i3)

*Outcome API Name: acer_1_i3

Condition Requirements to Execute Outcome: All Conditions Are Met (AND)

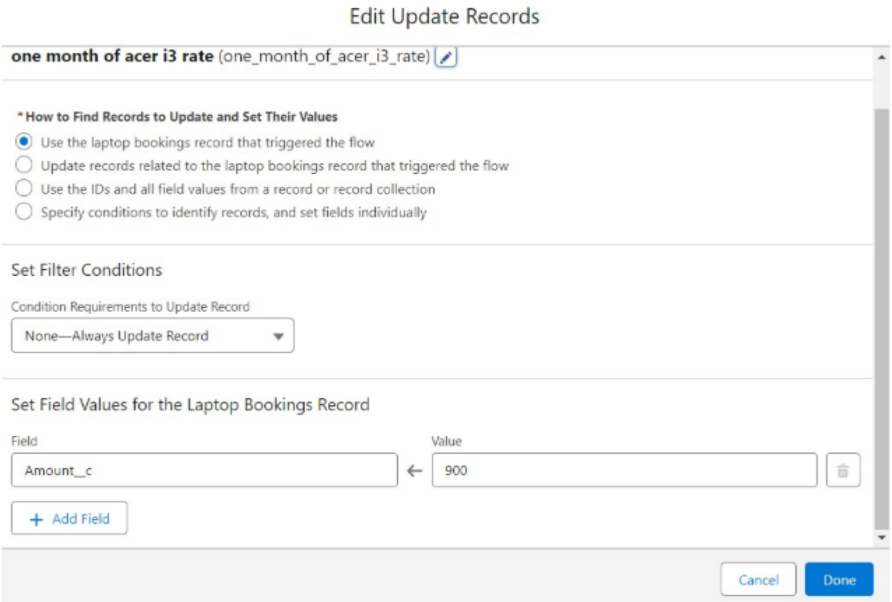
Resource	Operator	Value
$Record > how many months	Equals	1

18.After acer 1(i3) there is '+' symbol like acer 2(i3),acer 3(i3),acer 4(i3),acer 5(i3).

19.Click on '+' then select update records. Enter the Details Label: one month of acer i3 rate , API name: Gets Automatically Generated.

20.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 and click done.

Follow the same steps and create decision and Update record elements for Acer core i5 and Acer core i7. But enter different Amount values.


Edit Update Records

one month of acer i3 rate (one_month_of_acer_i3_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	←	900

Creating a flow on HP Laptop

1.Go to flow page

2.Beside hp there is a symbol '+' click on that. Again select decision

3.Enter the Details Label: HP core selection, API name: Gets Automatically Generated.

4.select the Outcome Details Label: hp core i3 , Outcome API name: Gets Automatically Generated.

5.Resource: Select Record.core type., Operator: Select Equals., Value: Select hp i3.

6.Similarly create outcomes for hp core i5 and hp core i7 also.

7.Go to flow page

8.Beside hp there is a symbol '+' click on that. Again select decision

9.Enter the Details Label: hp core i5 month selection , 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.

13.Resource: Select Record.how many months., Operator: Select Equals., Value: Select 2..

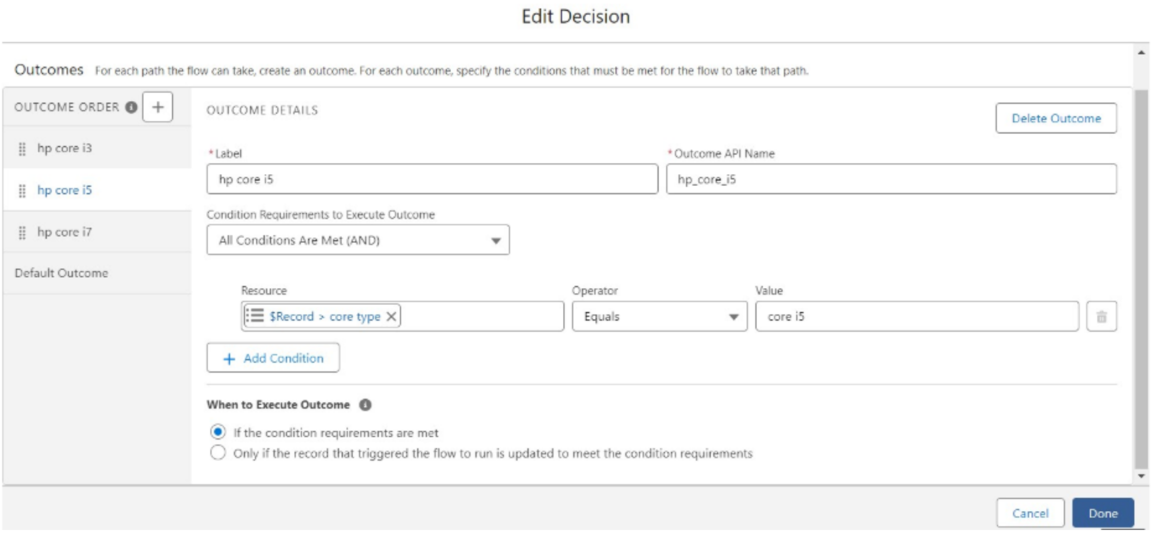
14.Click '+' outcome details. Enter the Outcome Details Label: hp 3(i5) , Outcome API name: Gets Automatically Generated.

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

16.Click '+' outcome details. Enter the Outcome Details Label: hp 4(i5) , Outcome API name: Gets Automatically Generated.

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

18.Click '+' outcome details. 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. Click on Done.



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

- hp core i3
- hp core i5
- hp core i7
- Default Outcome

OUTCOME DETAILS

*Label: hp core i5

*Outcome API Name: hp_core_i5

Condition Requirements to Execute Outcome: All Conditions Are Met (AND)

Resource	Operator	Value
$Record > core type	Equals	core i5

When to Execute Outcome

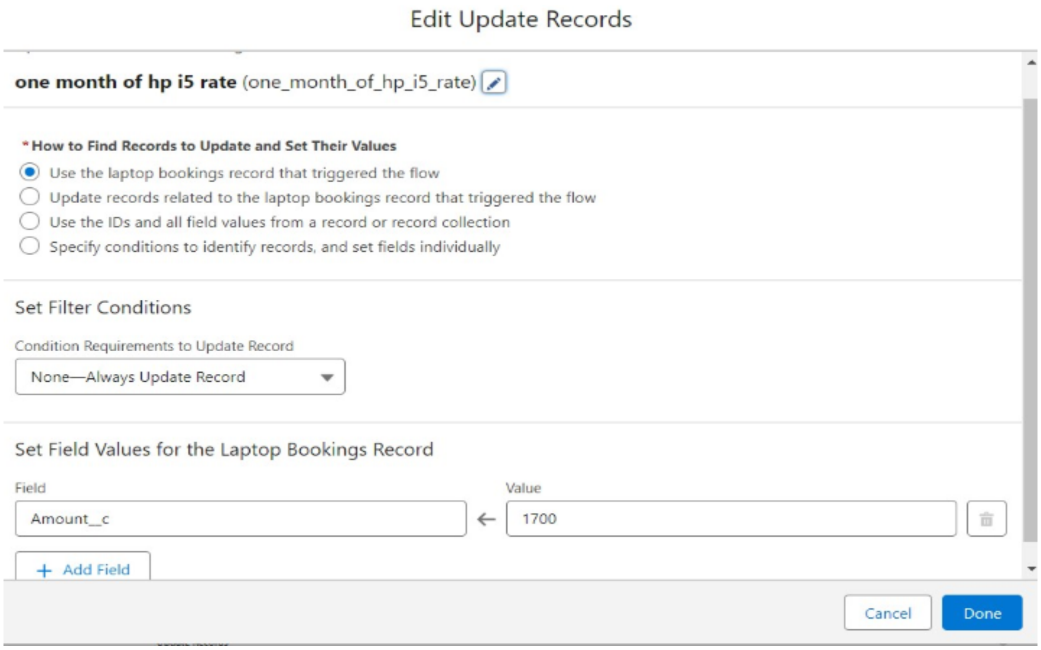
- ● If the condition requirements are met
- ○ Only if the record that triggered the flow to run is updated to meet the condition requirements

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 . Enter the Details Label: one month of hp i5 rate , API name: Gets Automatically Generated.

21.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 and click done.

Follow the same steps and create decision and Update record elements for Hp core i3 and Hp core i7. But enter different Amount values.



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

Creating a flow on MAC Laptop

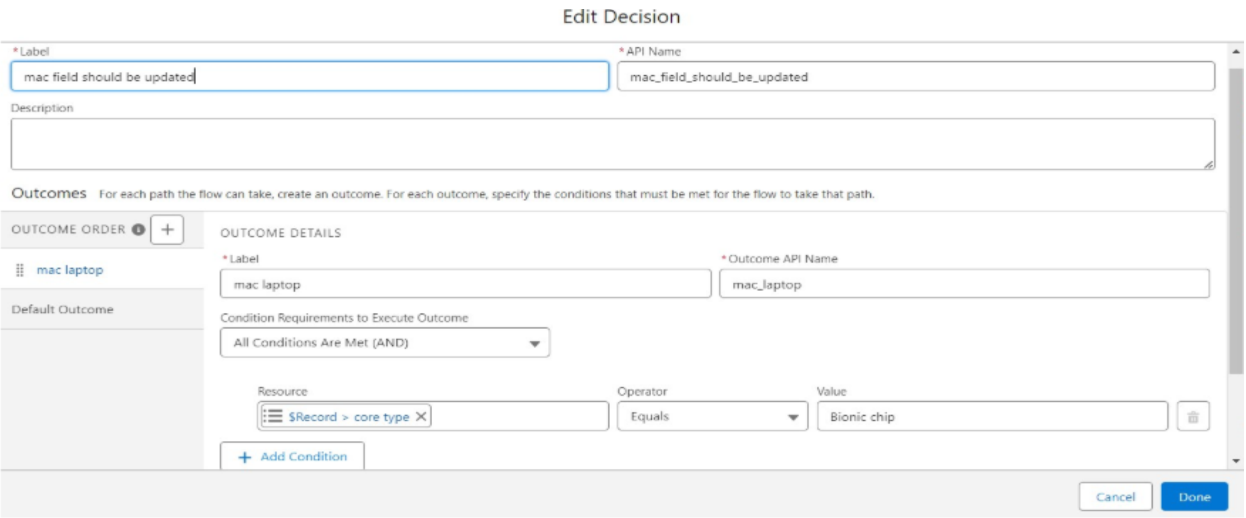
1.Go to flow page

2.Beside mac there is a symbol '+' click on that. Again select decision

3.Enter the Details Label: mac should be Updated, API name: Gets Automatically Generated.

4.select the Outcome Details Label: mac laptop , Outcome API name: Gets Automatically Generated.

5.Resource: Select Record.core type., Operator: Select Equals., Value: Select Bionic Chip. Click done.



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 DETAILS

*Label: mac laptop

*Outcome API Name: mac_laptop

Condition Requirements to Execute Outcome: All Conditions Are Met (AND)

Resource	Operator	Value
$Record > core type	Equals	Bionic chip

6.Go to flow page

7.Beside Mac there is a symbol '+' click on that. Again select decision

8.Enter the Details Label:Mac months selected , API name: Gets Automatically Generated.

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

10.Resource: Select Record.how many months., Operator: Select Equals., Value: 1.

11.Enter the Outcome Details Label: mac bionic chip(2) , Outcome API name: Gets Automatically Generated.

12.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(3) , Outcome API name: Gets Automatically Generated.

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

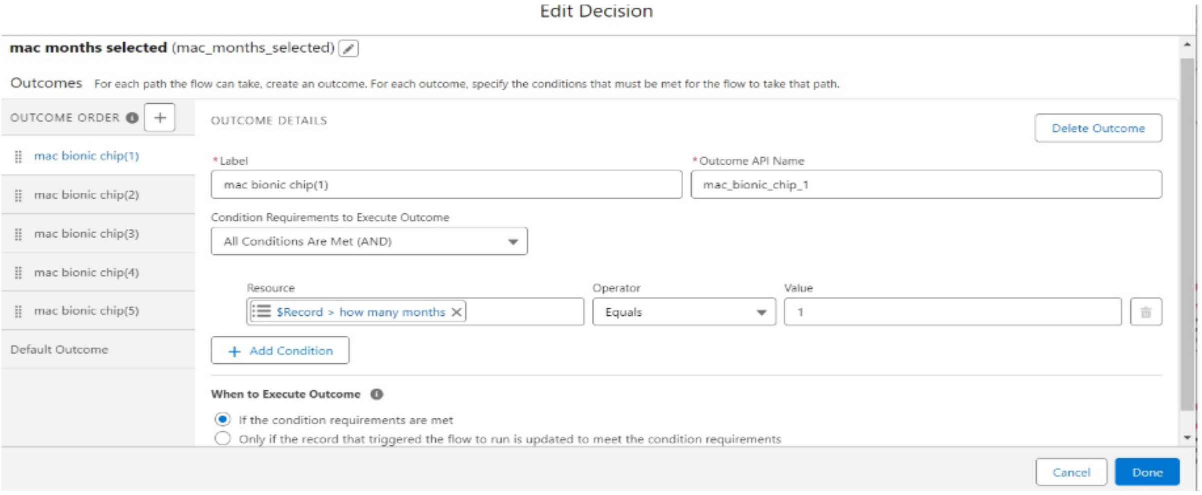
16.Click ‘+’ outcome details. Enter the Outcome Details Label: mac bionic chip(4) , Outcome API name: Gets Automatically Generated.

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

18.Click ‘+’ outcome details

19.Enter the Outcome Details Label: mac bionic chip(5) , Outcome API name: Gets Automatically Generated.

20.Resource: Select Record.how many months., Operator: Select Equals., Value: Select 5. Click done.


Edit Decision

mac months selected (mac_months_selected)

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

- mac bionic chip(1)
- mac bionic chip(2)
- mac bionic chip(3)
- mac bionic chip(4)
- mac bionic chip(5)
- Default Outcome

OUTCOME DETAILS

*Label: mac bionic chip(1)

*Outcome API Name: mac_bionic_chip_1

Condition Requirements to Execute Outcome: All Conditions Are Met (AND)

Resource	Operator	Value
$Record > how many months	Equals	1

When to Execute Outcome

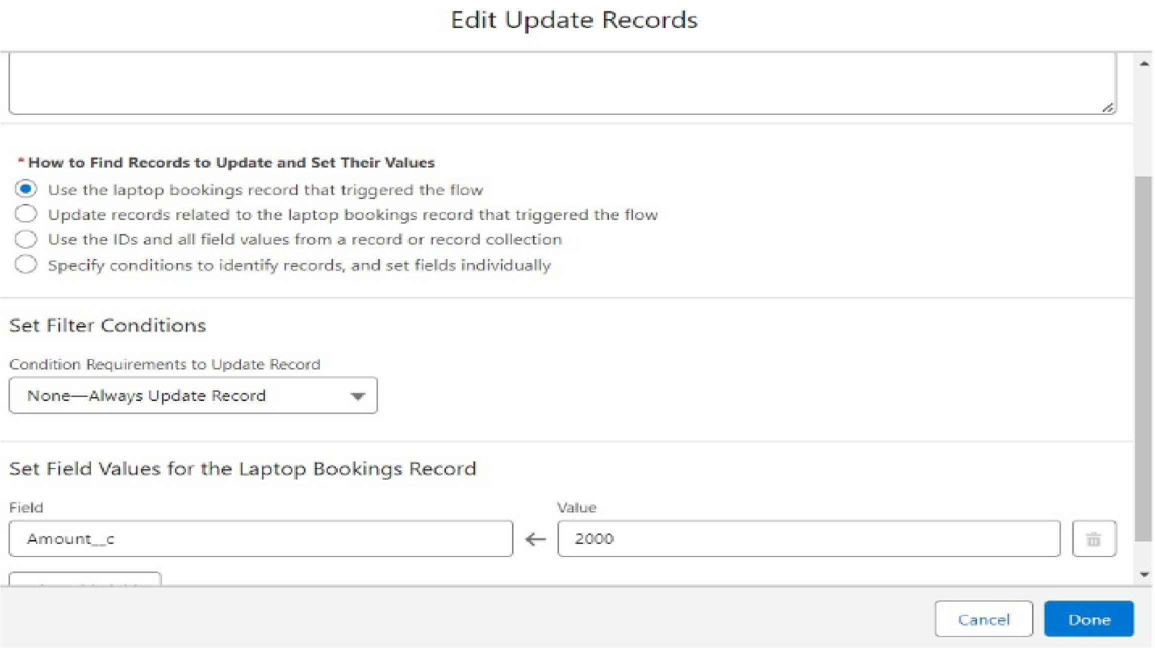
● If the condition requirements are met

○ Only if the record that triggered the flow to run is updated to meet the condition requirements

21.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).

22.Click on ‘+’ then select update records. Enter the Details Label: one month of mac rate , API name: Gets Automatically Generated.

23.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 click on done.



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

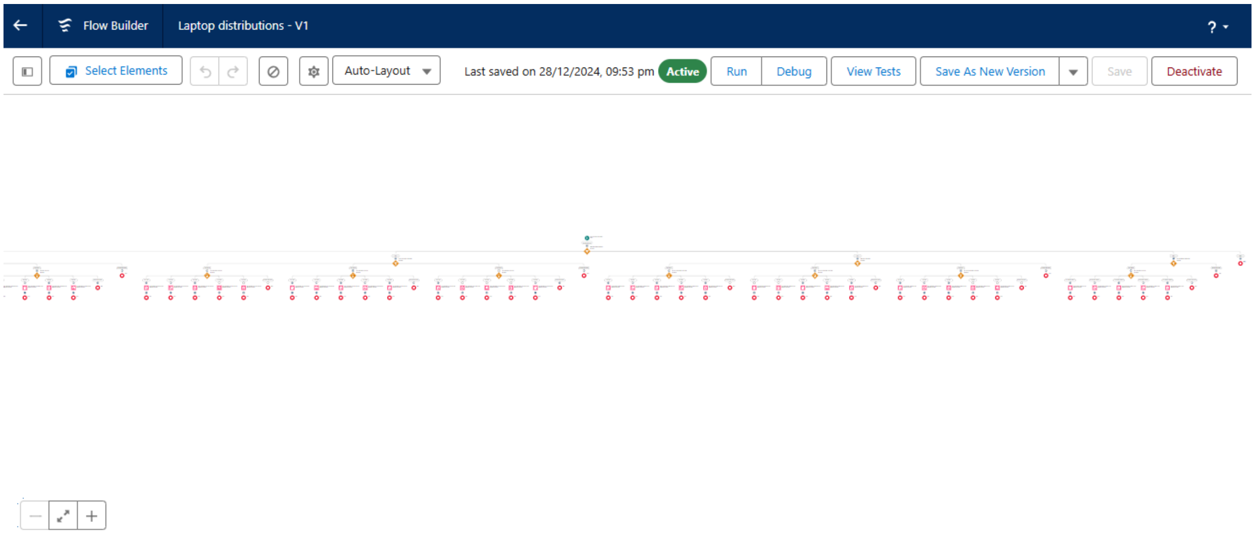
Condition Requirements to Update Record: None—Always Update Record

Set Field Values for the Laptop Bookings Record

Field		Value
Amount__c	←	2000

Click on save. Label:- Laptop distributions, api name:- automatically filled

Save the flow and activate it.



Flow Builder — Laptop distributions - V1

Last saved on 28/12/2024, 09:53 pm Active

APEX

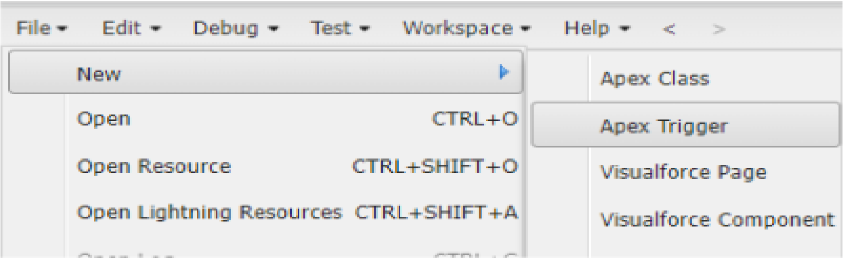
Apex Trigger and Handler Class

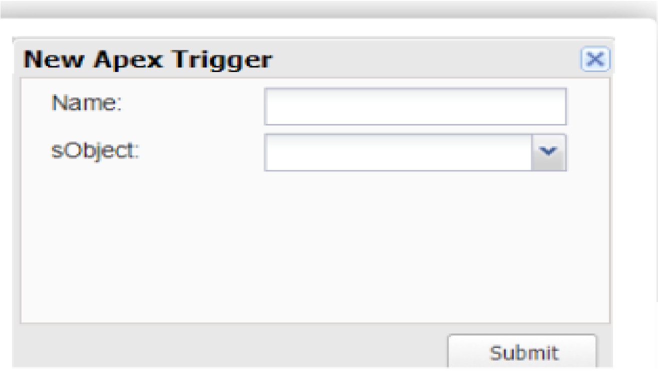
How to create a new trigger :

1.While still in the trailhead account, navigate to the gear icon in the top right corner. Click on developer console and you will be navigated to a new console window.

2.Click on the File menu in the toolbar, and click on new? Trigger.

3.Enter the trigger name and the object to be triggered.

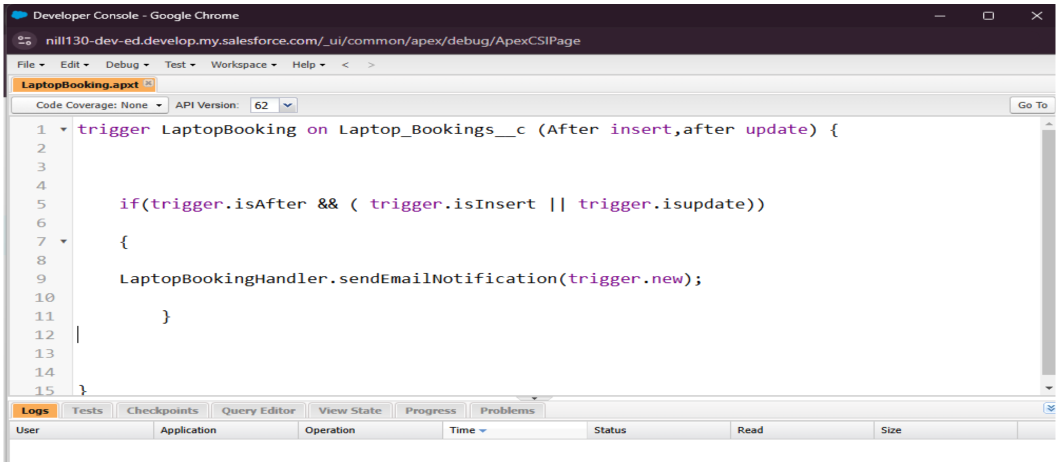




Note:- copy the API names

1.LaptopBooking - trigger name

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



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



    if(trigger.isAfter && ( trigger.isInsert || trigger.isupdate))

    {

    LaptopBookingHandler.sendEmailNotification(trigger.new);

        }



}
```

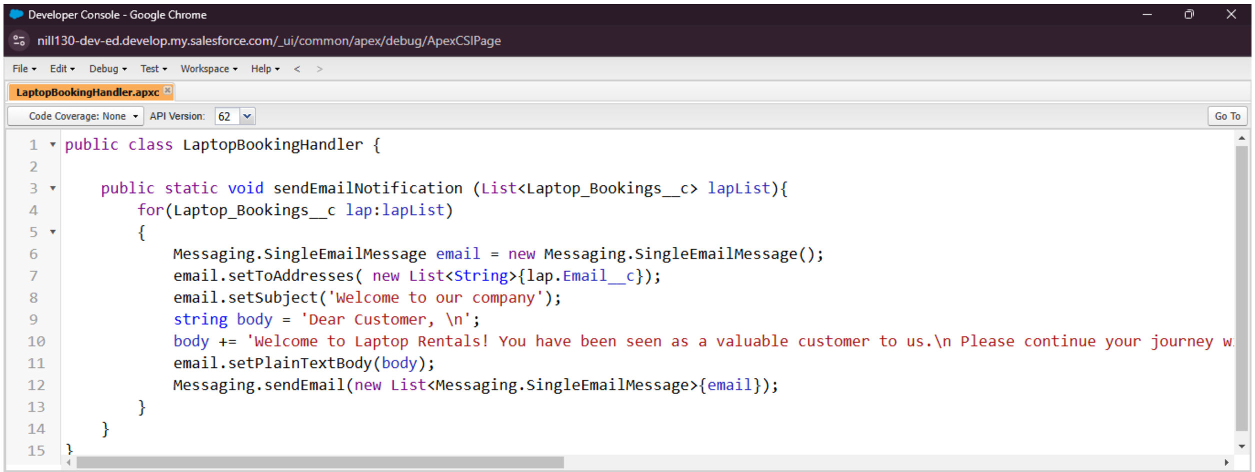
Handler Class:

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).



```
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 Customer, \n';
            body += 'Welcome to Laptop Rentals! You have been seen as a valuable customer to us.\n Please continue your journey w
            email.setPlainTextBody(body);
            Messaging.sendEmail(new List<Messaging.SingleEmailMessage>{email});
        }
    }
}
```

Reports

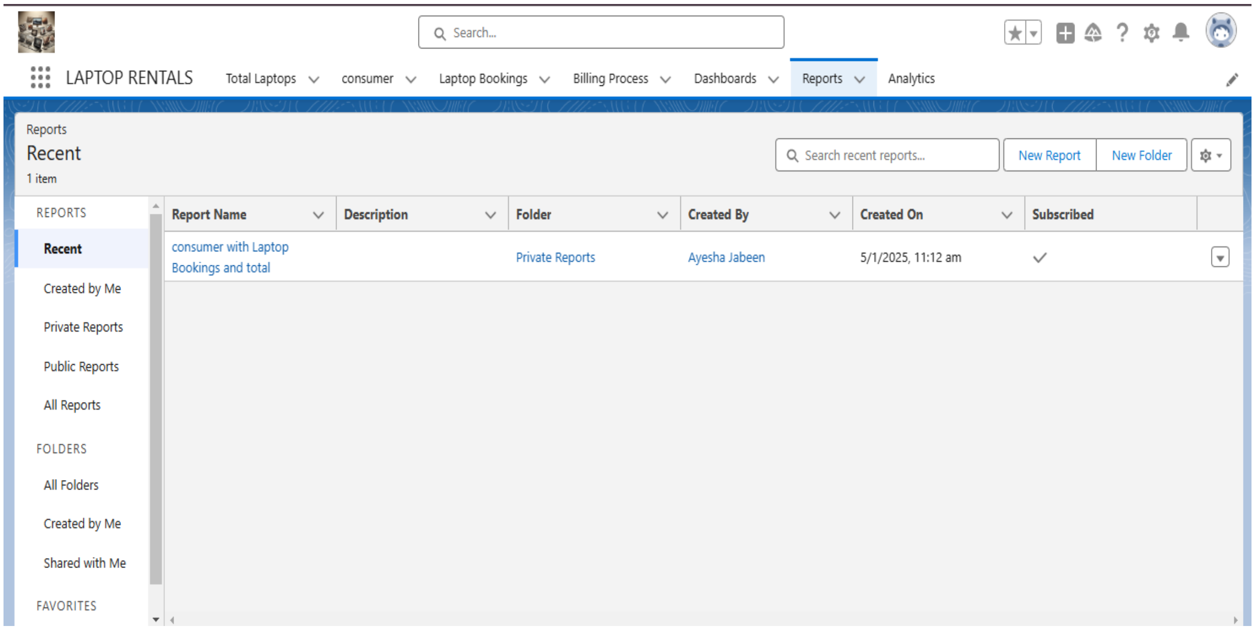
Create Report

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).

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

2.Click New Report.

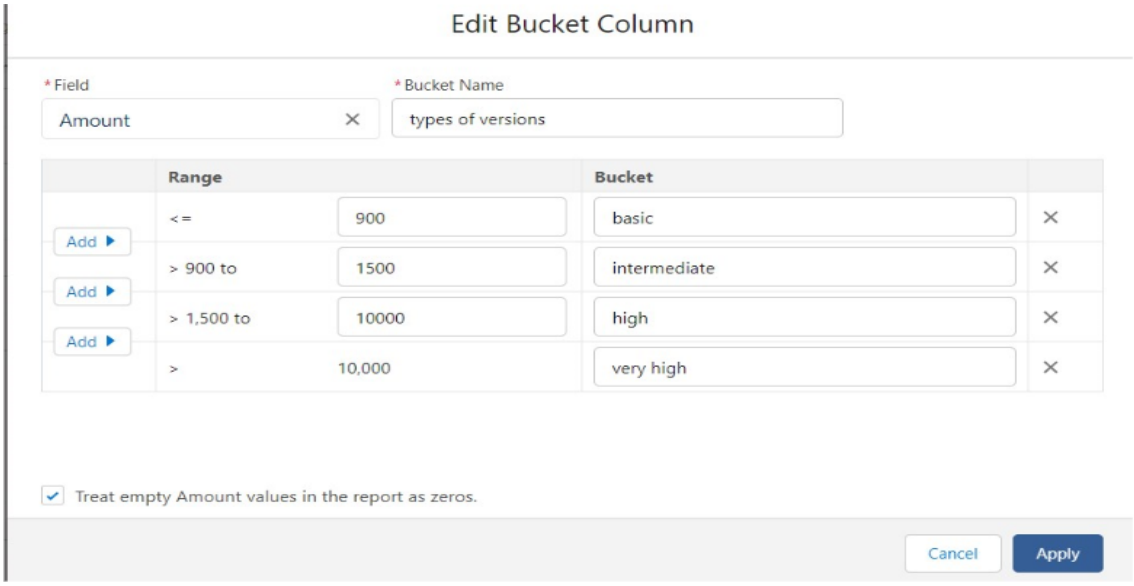


Report Name	Description	Folder	Created By	Created On	Subscribed
consumer with Laptop Bookings and total		Private Reports	Ayesha Jabeen	5/1/2025, 11:12 am	✓

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.

4.Create a simple tabular report. Add fields from left pane, make sure that Amount field will be selected.

5.Click the Amount column drop down and select bucket list. Click Apply.



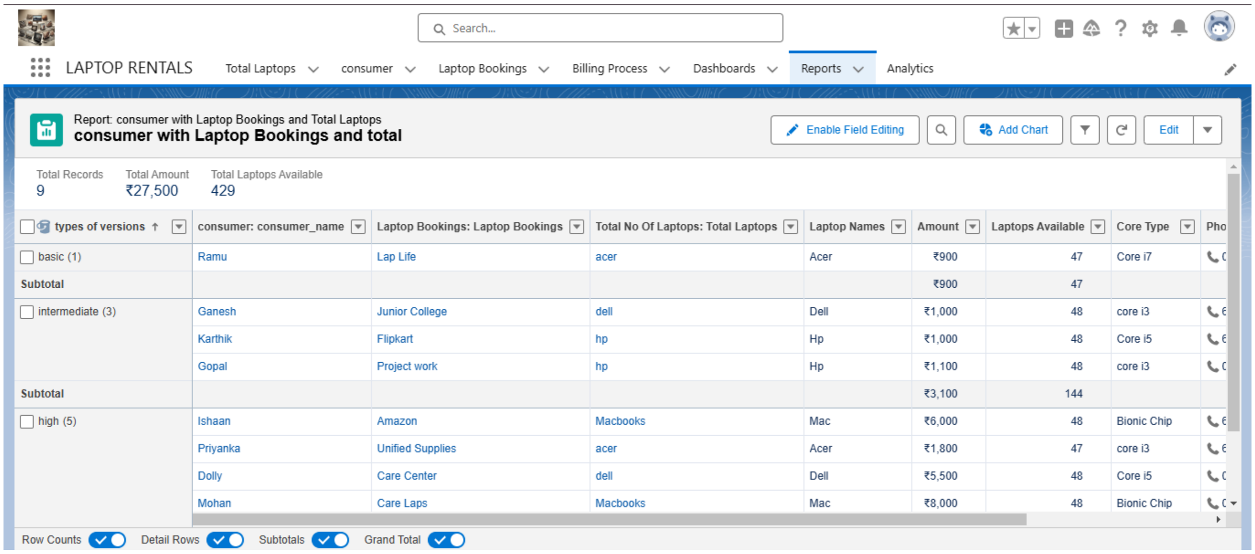
* Field: Amount

* Bucket Name: types of versions

Range		Bucket
<=	900	basic
> 900 to	1500	intermediate
> 1,500 to	10000	high
>	10,000	very high

☑ Treat empty Amount values in the report as zeros.

6.Select Types of version in Group By Rows to create a summary report. Follow the image for other fields. Click on Save and Run it.



Report: consumer with Laptop Bookings and Total Laptops

consumer with Laptop Bookings and total

Total Records 9

Total Amount ₹27,500

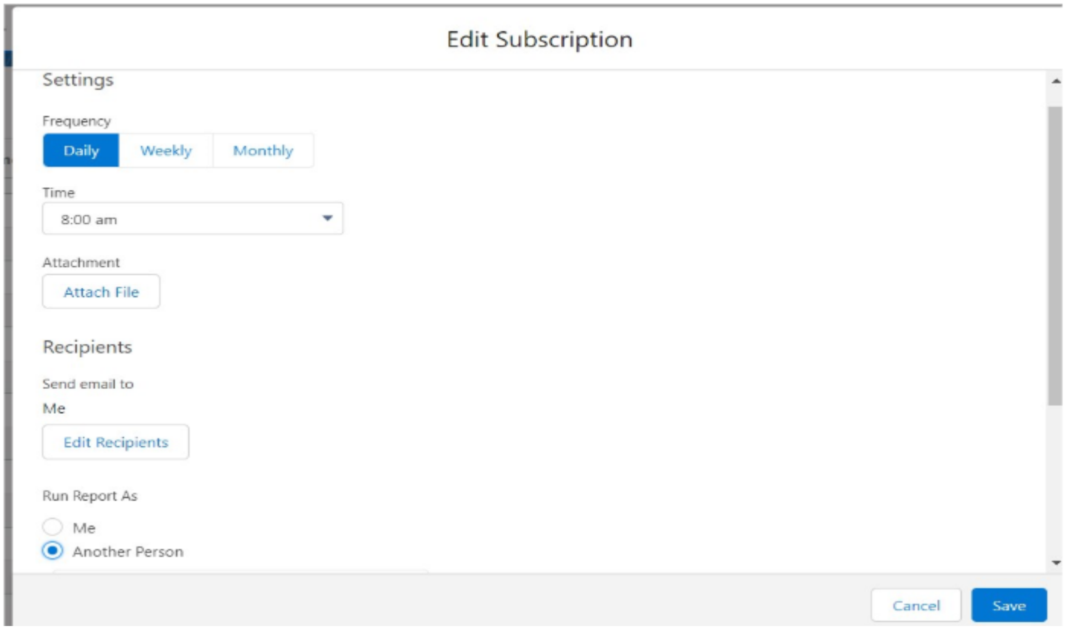
Total Laptops Available 429

types of versions ↑	consumer: consumer_name	Laptop Bookings: Laptop Bookings	Total No Of Laptops: Total Laptops	Laptop Names	Amount	Laptops Available	Core Type	Pho
☐ basic (1)	Ramu	Lap Life	acer	Acer	₹900	47	Core i7	
Subtotal					₹900	47		
☐ intermediate (3)	Ganesh	Junior College	dell	Dell	₹1,000	48	core i3	
	Karthik	Flipkart	hp	Hp	₹1,000	48	Core i5	
	Gopal	Project work	hp	Hp	₹1,100	48	core i3	
Subtotal					₹3,100	144		
☐ high (5)	Ishaan	Amazon	Macbooks	Mac	₹6,000	48	Bionic Chip	
	Priyanka	Unified Supplies	acer	Acer	₹1,800	47	core i3	
	Dolly	Care Center	dell	Dell	₹5,500	48	Core i5	
	Mohan	Care Laps	Macbooks	Mac	₹8,000	48	Bionic Chip	

Sharing report to owner

1.Click edit drop down and select subscribe option

2.Follow as per below image.



Edit Subscription

Settings

Frequency: Daily | Weekly | Monthly (Daily selected)

Time: 8:00 am

Attachment

Recipients

Send email to

Me

Run Report As

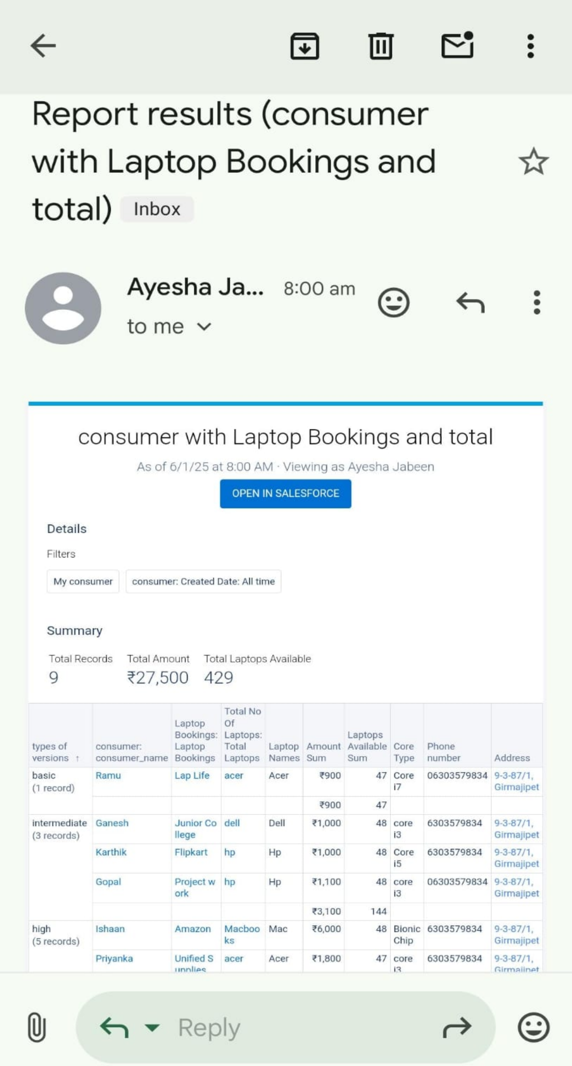
○ Me

● Another Person

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

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

Result:



Report results (consumer with Laptop Bookings and total) Inbox

Ayesha Ja... 8:00 am

to me

consumer with Laptop Bookings and total

As of 6/1/25 at 8:00 AM · Viewing as Ayesha Jabeen

OPEN IN SALESFORCE

Details

Filters

My consumer

consumer: Created Date: All time

Summary

Total Records	Total Amount	Total Laptops Available
9	₹27,500	429

types of versions ↑	consumer: consumer_name	Laptop Bookings: Laptop Bookings	Total No Of Laptops: Total Laptops	Laptop Names	Amount Sum	Laptops Available Sum	Core Type	Phone number	Address
basic (1 record)	Ramu	Lap Life	acer	Acer	₹900	47	Core i7	06303579834	9-3-87/1, Girmajipet
					₹900	47			
intermediate (3 records)	Ganesh	Junior Co llege	dell	Dell	₹1,000	48	core i3	6303579834	9-3-87/1, Girmajipet
	Karthik	Flipkart	hp	Hp	₹1,000	48	Core i5	6303579834	9-3-87/1, Girmajipet
	Gopal	Project w ork	hp	Hp	₹1,100	48	core i3	06303579834	9-3-87/1, Girmajipet
					₹3,100	144			
high (5 records)	Ishaan	Amazon	Macboo ks	Mac	₹6,000	48	Bionic Chip	6303579834	9-3-87/1, Girmajipet
	Priyanka	Unified S	acer	Acer	₹1,800	47	core	6303579834	9-3-87/1,

Dashboards

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. Click save.

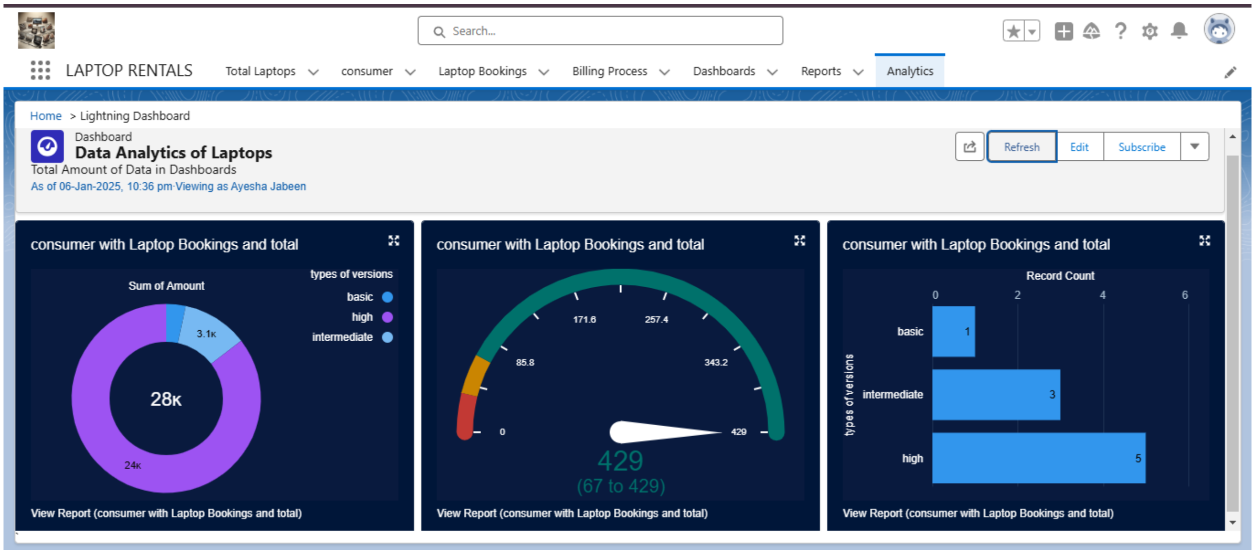
Create Dashboard

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

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

3.Select add component.

4.Select a Report and click on select.



Home > Lightning Dashboard

Dashboard

Data Analytics of Laptops

Total Amount of Data in Dashboards

As of 06-Jan-2025, 10:36 pm·Viewing as Ayesha Jabeen

5.Select the dark component and add to the dashboards.

6.Save it.

7.Click done.

5. Testing and Validation

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).

Apex Class Code:

```
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 Customer, \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_type__c +' \n Laptop type = '+lap.Laptop_name__c;
             email.setPlainTextBody(body);
                Messaging.sendEmail(new List<Messaging.SingleEmailMessage>{email})}}}
```

Apex trigger Code:

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

Unit Testing:

Apex classes and triggers were validated to ensure error-free email notifications.

Roll-up summary and formula fields were tested for accurate calculations.

User Interface Testing:

Verified functionality of page layouts, ensuring seamless navigation and usability.

Ensured accurate rendering of reports and dashboards.

End-to-End Testing:

Simulated daily workflows, including data entry, report generation, and dashboard updates, to validate system reliability.

Tested role-based access controls to ensure proper data visibility and security.

6. Key Scenarios Addressed by Salesforce in the Implementation Project

Daily Reporting:

Automating the generation of daily sales and revenue reports for the owner.

Role-Based Data Access:

Providing tailored access to data based on user roles.

Enhanced Customer Engagement:

Sending email notifications to customers with details of their purchases and payments.

Data Integrity:

Ensuring data consistency and reliability through validation rules and error handling.

Business Insights:

Delivering actionable insights through reports and dashboards, enabling data-driven decisions.

7. Conclusion

Summary of Achievements:
The Laptop Rentals CRM Application successfully streamlined and enhanced the laptop rental business’s operational processes. Key achievements include:

- **Operational Efficiency:**
  - Optimized workflows and improved inventory management through automated data handling and tracking of rental transactions.

- **Data Visualization:**
  - Created dynamic reports and dashboards to provide real-time insights into inventory utilization, revenue trends, and rental durations.

- **Enhanced Security:**
  - Implemented robust role-based access controls and field-level security to ensure data confidentiality and integrity.

- **Improved Customer Communication:**
  - Automated email notifications for rental confirmations, due date reminders, and follow-up communications, enhancing customer engagement and satisfaction.

- **Scalability:**
  - Developed a scalable and modular solution using Salesforce's flexible architecture, allowing easy adaptation for future business growth and feature enhancements.

The Laptop Rentals CRM Application demonstrates the transformative potential of Salesforce in addressing industry-specific challenges. By automating processes, improving customer experiences, and enabling insightful decision-making, the solution has paved the way for operational excellence and sustainable growth in the laptop rental business.