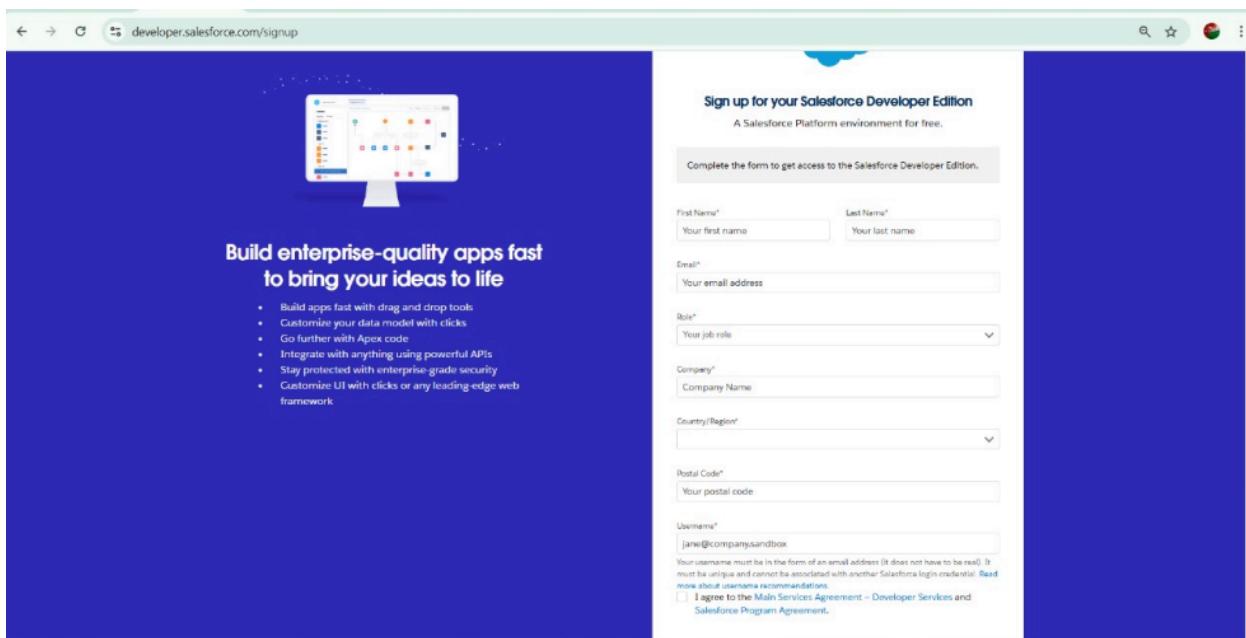


A CRM APPLICATION FOR LAPTOP RENTALS CRM

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.



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.

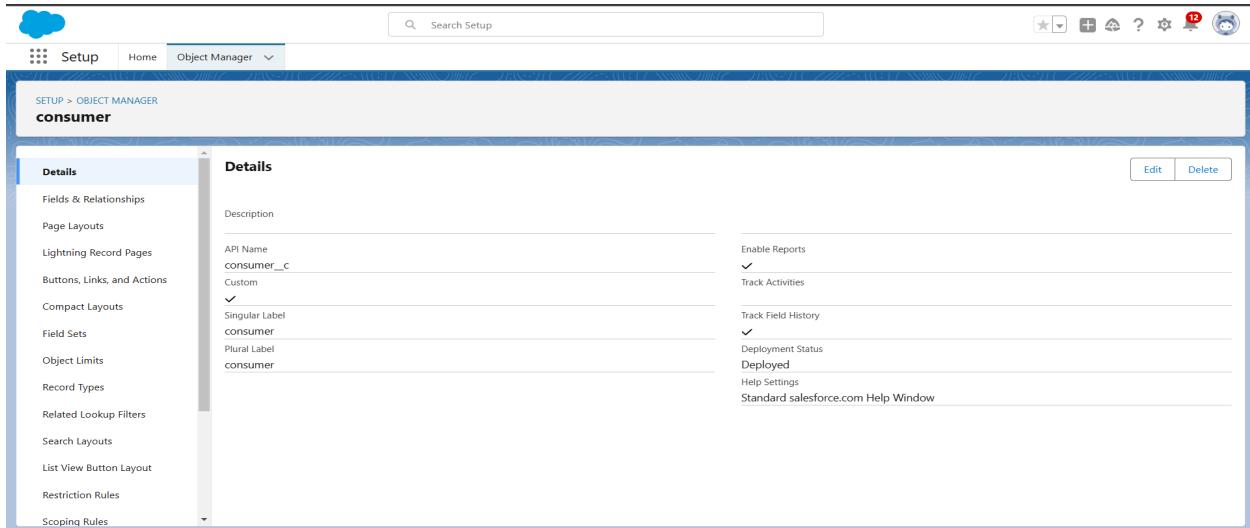
Create Total Laptops Object

- 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 shows the Salesforce Object Manager interface. At the top, there's a navigation bar with icons for Home, Setup, and Object Manager. A search bar says 'Search Setup'. Below the navigation is a breadcrumb trail 'SETUP > OBJECT MANAGER' and the title 'Total Laptops'. On the left is a sidebar with various tabs like Fields & Relationships, Page Layouts, Lightning Record Pages, etc. The main area has a 'Details' tab selected. It shows fields for API Name ('Total_Laptop_c'), Singular Label ('Total Laptops'), and Plural Label ('Total Laptops'). On the right, under 'Details', there are checkboxes for 'Enable Reports' (checked), 'Track Activities' (checked), 'Track Field History' (checked), and 'Deployment Status' (set to 'Deployed'). At the bottom right 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.

The screenshot shows the Salesforce Setup page with the 'Object Manager' tab selected. Under 'SETUP > OBJECT MANAGER', the object 'Laptop Bookings' is displayed. On the left, a sidebar lists various configuration options: 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 main panel is titled 'Details' and contains fields for 'Description', 'API Name' (set to 'Laptop_bookings__c'), 'Custom' (checked), 'Singular Label' (set to 'Laptop Bookings'), 'Plural Label' (set to 'Laptop Bookings'), and several checkboxes for reporting and tracking.

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.

The screenshot shows the Salesforce Setup page with the 'Object Manager' tab selected. Under 'SETUP > OBJECT MANAGER', the object 'Billing Process' is displayed. The sidebar and main panel structure are identical to the 'Laptop Bookings' screenshot, showing the same configuration fields and checkboxes for API name, singular/plural labels, and various reporting and tracking options.

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 profiles page) keep it as default >> Next (Add to Custom App) uncheck the include tab .
- Make sure that the Append tab to users' existing personal customizations is checked.
- Click save.

The screenshot shows the Salesforce Setup interface. In the top left, there's a blue cloud icon. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar labeled 'Search Setup'. On the right side of the header are various icons for account management and notifications. The main content area has a title 'SETUP Tabs'. Below it, a section titled 'Custom Tabs' is described as allowing users to create new custom tabs to extend Salesforce functionality or build new application functionality. It includes a note about different types of tabs: Custom Object tabs, Web tabs, and Visualforce tabs. Under 'Custom Object Tabs', there is a table listing four tabs:

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

Below this table are two more sections: 'Web Tabs' and 'Visualforce Tabs', each with a note indicating 'No Web Tabs have been defined' and 'No Visualforce Tabs have been defined' respectively.

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 nd >> 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 Details & Branding' section of the Lightning App Builder. The 'App Name' is set to 'LAPTOP_RENTALS'. The 'Developer Name' is also 'LAPTOP_RENTALS'. There is a placeholder 'Description' field with the text 'Enter a description...'. An 'Image' field displays a thumbnail of a laptop with the text 'Laptop on rent'. A color picker shows the 'Primary Color Hex Value' as '#0070D2'. Below these settings is an 'Org Theme Options' checkbox, which is unchecked. At the bottom is an 'App Launcher Preview' section showing a small version of the app's interface.

Fields

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

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

>>Created By

>>Owner

>> Last Modified

>> Field Made During object Creation

2. Custom Fields: On the other side of the coin, Custom Fields are highly flexible, and users can change them according to requirements. Moreover, each organization 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

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

The screenshot shows the 'Object Manager' screen for 'Laptop Bookings'. On the left, a sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Field Sets. The main area is titled 'Fields & Relationships' and contains a configuration for a new field. The 'Field Label' is set to 'Laptop names'. Under 'Values', the 'Enter values, with each value separated by a new line' option is selected, and a text box contains the values 'Dell', 'Acer', 'Hp', and 'Mac'. There are also checkboxes for 'Display values alphabetically, not in the order entered', 'Use first value as default value', and 'Restrict picklist to the values defined in the value set', which is checked. The 'Field Name' is 'Laptop_type', and there are fields for 'Description' and 'Help Text'.

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 .

This screenshot shows the same 'Object Manager' interface for 'Laptop Bookings', but with different picklist values. The 'Field Label' is 'Processors'. The 'Values' section shows 'core i3', 'core i5', 'core i7', and 'bionic chip' listed in the text box. The checkboxes for 'Display values alphabetically, not in the order entered', 'Use first value as default value', and 'Restrict picklist to the values defined in the value set' are present, with 'Restrict picklist to the values defined in the value set' checked. The 'Field Name' is 'Processors', and there are fields for 'Description' and 'Help Text'.

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.

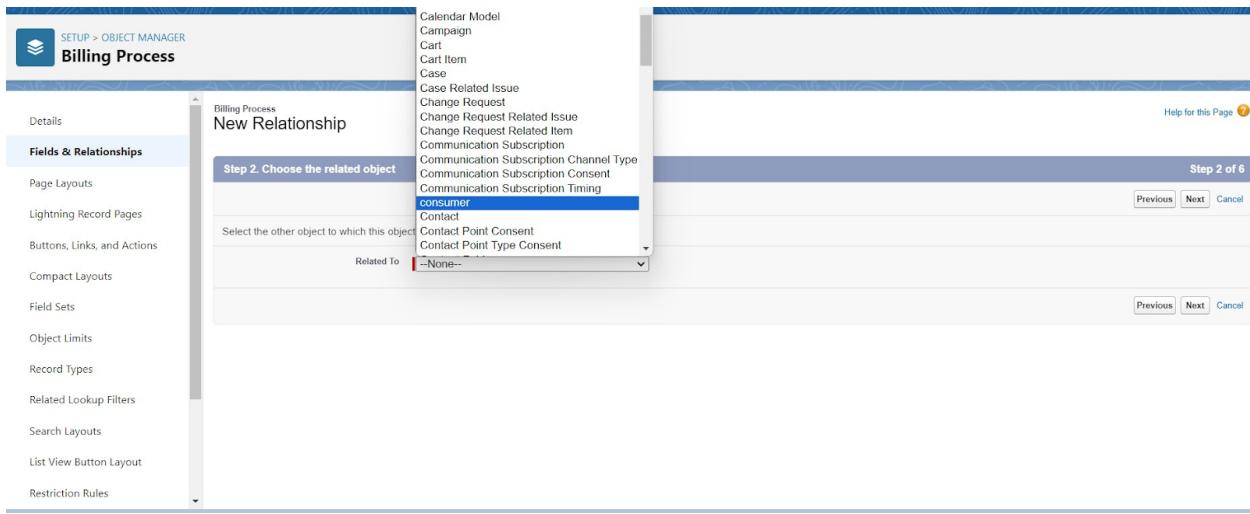
The screenshot shows the 'Edit Field Dependency' page in the Salesforce Setup. The page title is 'Edit Field Dependency'. It shows a grid where rows are 'Laptop names' and columns are 'Processors'. The 'Dell' row includes 'core i3', 'core i5', and 'core i7'. The 'HP' row includes 'core i3', 'core i5', and 'core i7'. The 'Mac' row includes 'Bionic chip'. The 'Acer' row includes 'core i3', 'core i5', and 'core i7'. A legend indicates that yellow cells represent 'Included Value' and grey cells represent 'Excluded Value'.

To Create a Fields & Relationship for Billing Process Object

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

Next

6. Change the Field Label: Name
7. click on Next >> Next >> Save and new



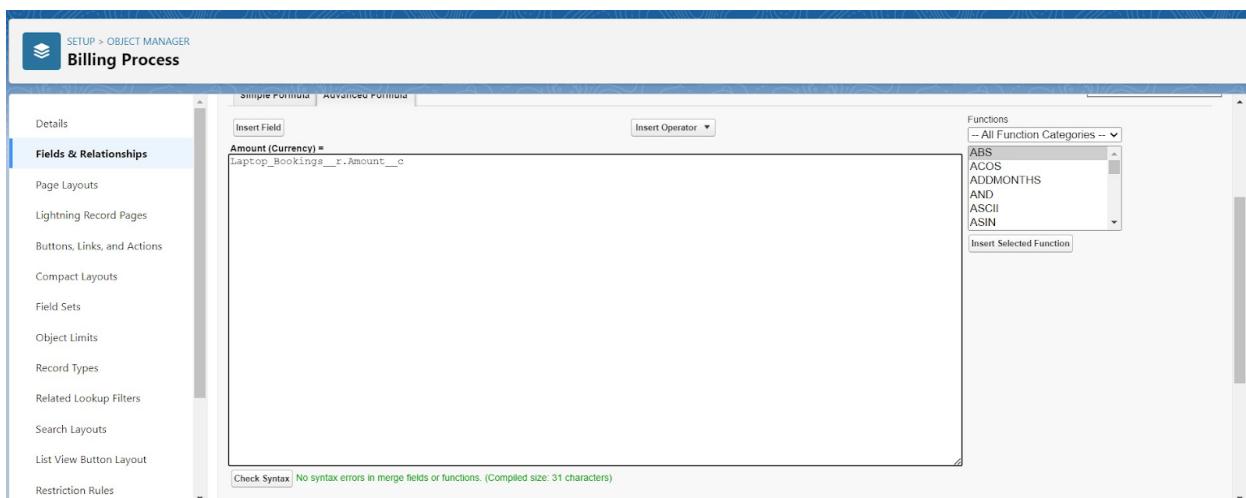
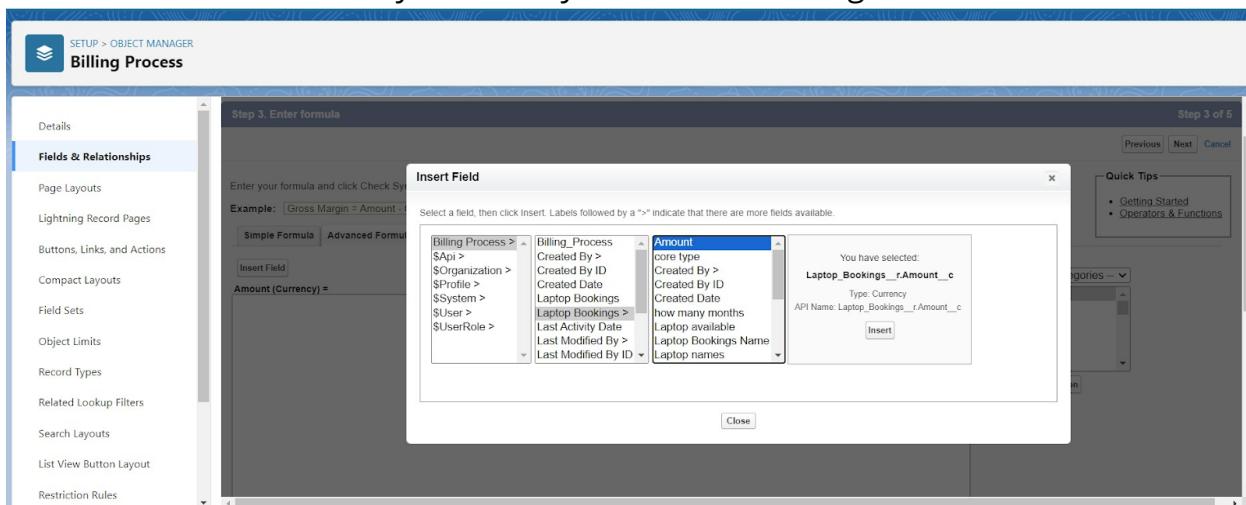
Creation of another fields for the billing process object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Billing Process) in the search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data Type as a “Picklist”
4. Fill the Above as following:
 - Field Label: Payment Mode
 - Value >> Select enter values with each value separated by a new line
 - 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

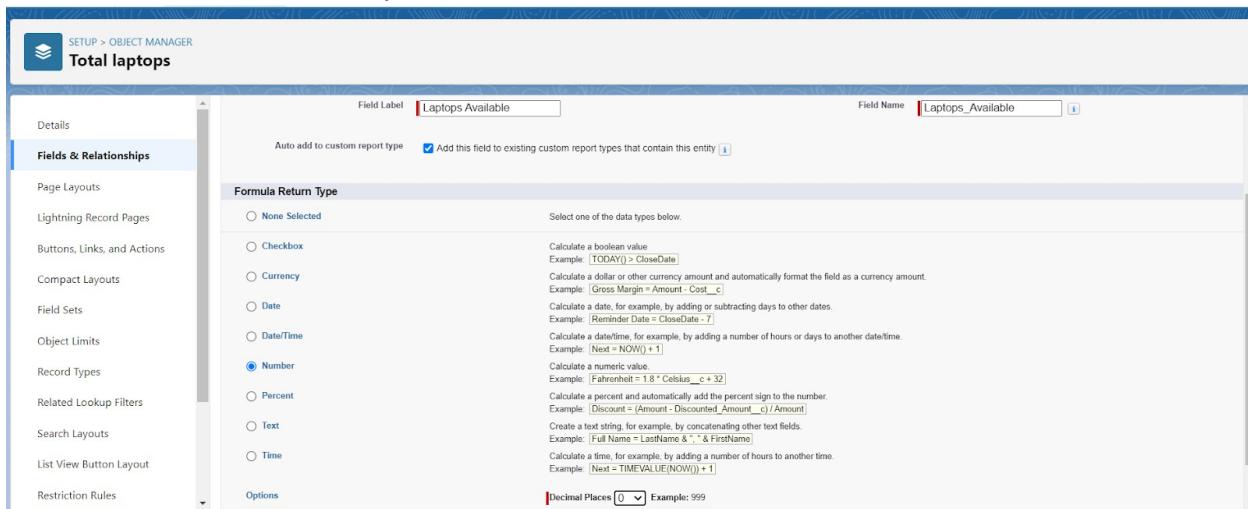
1. Go to setup >> click on Object Manager >> type object name(Billing Process) in the search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data Type as a “Formula”
4. Click on Next
5. Enter the Field label: Amount, the Field name gets auto generated and click on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



Validation rule

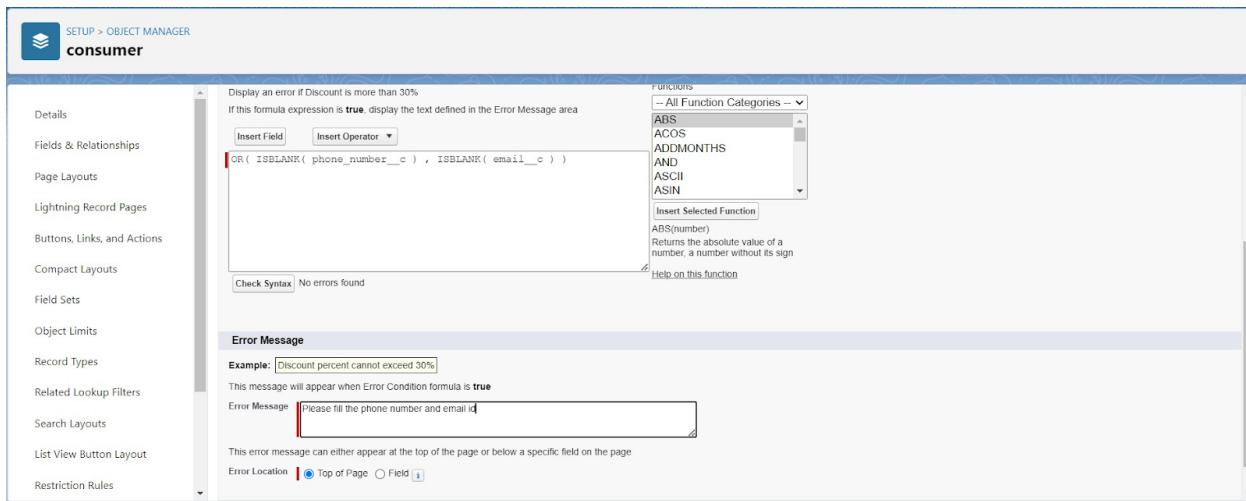
Validation rules are applied when a user tries to save a record and are used to check if the data meets specified criteria. If the criteria are not met, the validation rule triggers an error message and prevents the user from saving the record until the issues are resolved.

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



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 deleted 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 shows the Salesforce Setup Profiles page. The top navigation bar includes 'SETUP' and 'Profiles'. The left sidebar shows 'Users' and 'Profiles' (which is selected). A search bar at the top right contains 'profil'. The main content area displays the 'Owner' profile details:

Profile Detail

Name	Owner	Custom Profile
User License	Salesforce	<input checked="" type="checkbox"/>
Description		
Created By	Buwan Chandra Kumar Singh Chowhan 18/11/2024, 11:23 am	Modified By Buwan Chandra Kumar Singh Chowhan 18/11/2024, 11:24 am

Page Layouts

Standard Object Layouts	Global	Invoice
Email Application	Not Assigned	[View Assignment]
Home Page Layout	DE Default	[View Assignment]
Account	Account Layout	[View Assignment]
Alternative Payment Method	Alternative Payment Method Layout	[View Assignment]

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

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

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

The screenshot shows the Salesforce Profiles page for the 'Agent' profile. The 'Profile Detail' section includes fields for Name (Agent), User License (Salesforce Platform), Description, Created By (Buvan Chandra Kumar Singh Chowhan, 18/11/2024, 11:25 am), and Modified By (Buvan Chandra Kumar Singh Chowhan, 18/11/2024, 11:26 am). The 'Page Layouts' section lists various object layouts with their global assignments. A URL at the bottom of the page is: <https://pvsit1c6-dev-ed.my.salesforce.com/one/app#/alohadirect/00eNS0000031lw7edtp+pt1>.

The screenshot shows the 'Custom Object Permissions' section where 'Billing Process' and 'consumers' objects have been granted various permissions. It also shows the 'Session Settings' section with session timeout and security level configurations. A URL at the bottom of the page is: <https://pvsit1c6-dev-ed.my.salesforce.com/one/app#/alohadirect/00eNS0000031lw7edtp+pt1>.

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:

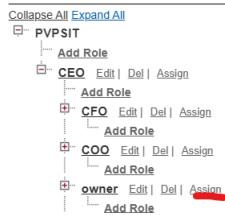
1. Go to quick find >> Search for Roles >> click on set up roles.
2. Click on Expand All and click on add role under whom this role works.
3. Give Label as "owner" and Role name gets auto populated. Then click on Save.

The screenshot shows the Salesforce Setup interface for Roles. At the top, there is a navigation bar with 'SETUP' and a 'Roles' icon. Below the navigation, a tree view shows the hierarchy: PVPSIT Role (expanded) has four children: CEO, CFO, COO, and owner. Each of these four roles has an 'Add Role' link next to it. The 'owner' node is also expanded, showing another 'Add Role' link. The main content area is titled 'Role Edit' and shows a 'New Role' form. The form fields are: 'Label' (set to 'owner'), 'Role Name' (set to 'owner'), 'This role reports to' (set to 'CEO'), and 'Role Name as displayed on reports' (empty). At the bottom of the form are three buttons: 'Save', 'Save & New', and 'Cancel'. A 'Help for this Page' link is located in the top right corner of the content area.

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.

The screenshot shows the Salesforce 'User Detail' page for a user named 'Vicky Shah'. The page includes fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Delegated Approver, Manager, Receive Approval Request Emails, Federation ID, Role, User License, Profile, Active status, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Push Registrations, Data.com User Type, Accessibility Mode (Classic Only), Debug Mode, and High-Contrast Palette on Charts. The 'Role' field is set to 'owner', 'User License' is 'Salesforce', and 'Profile' is 'Standard User'. The 'Active' checkbox is checked. Other checkboxes like 'Marketing User' and 'Offline User' are unchecked.

Creating Agent User

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 : sharma
5. Alias : Give a Alias Name
6. Email id : Give your Personal Email id
7. Username : Username should be in this form: text@text.text
8. Nick Name : Give a Nickname
9. Role : Agent
10. User license : Salesforce platform
11. Profiles : standard platform user.

The screenshot shows the Salesforce User Detail page for a user named 'Ram Sharma'. The top navigation bar includes 'SETUP' and 'Users'. Below the header, the user's name 'Ram Sharma' is displayed, along with a link to 'User Profile Help for this Page'. A horizontal toolbar offers options like 'Edit', 'Sharing', 'Reset Password', 'Freeze', and 'View Summary'. The main section, titled 'User Detail', contains a table with the following data:

	Name	Ram Sharma	Role	Agent
Alias	rshar	User License	Salesforce Platform	
Email	buvansingh05@gmail.com [Verify]	Profile	Standard Platform User	
Username	buvansingh05@gmail.com	Active	<input checked="" type="checkbox"/>	
Nickname	rsharma	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.

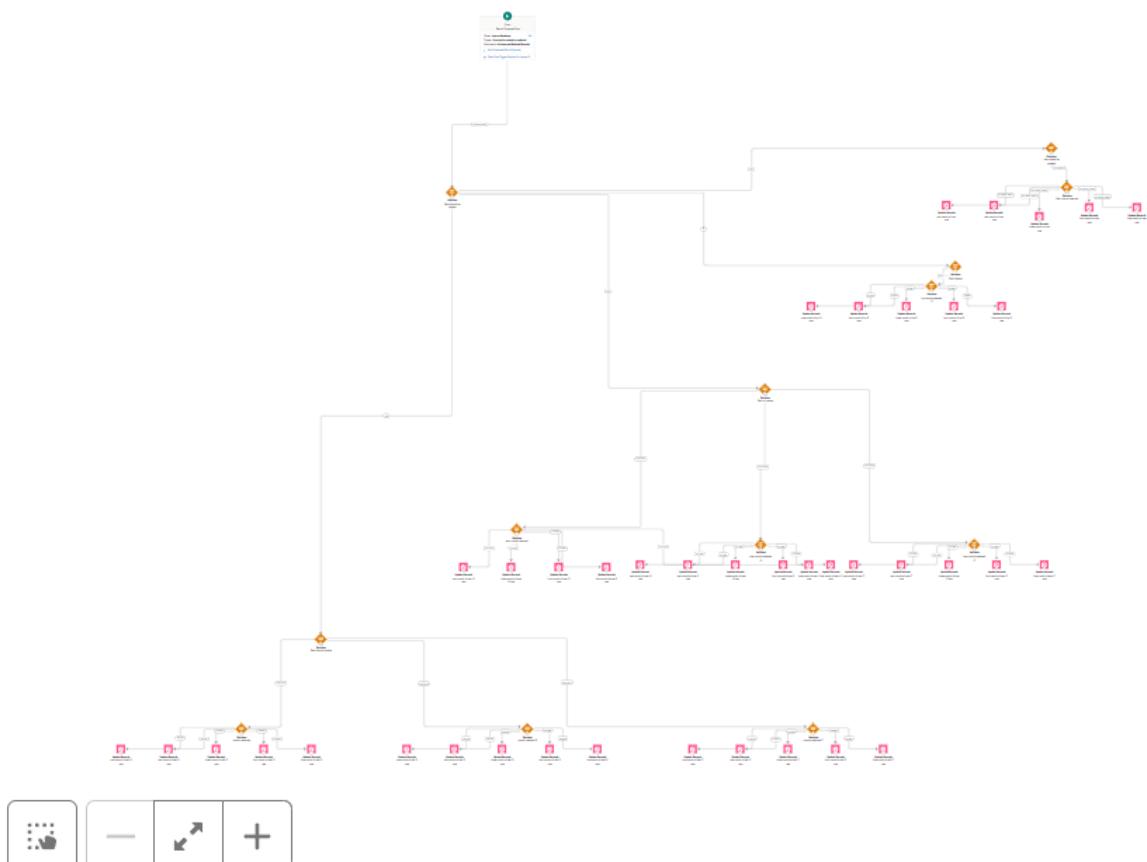
Create a Flow on dell laptop

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 icon 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 i.e.

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

1.Class name:- LaptopBookingHandler

2.API Name:- Laptop_Bookings__c(as per your org go to laptop booking object and copy from that).

3.core__c (as per your org go to laptop booking object and copy from that).

4.Laptop_type__c.(as per your org go to laptop booking object and copy from that).

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

Reports

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

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

Types of Reports in Salesforce :

1. **Tabular 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.

The screenshot shows a report builder interface with the following details:

Top Navigation: LAPTOP RENTALS, Total Laptops, consumer, Billing Process, Laptop Bookings, Report Builder.

Toolbar: Search bar, star icon, plus icon, question mark, refresh, report builder icon, 12 notifications, user icon, pencil icon.

Report Type: REPORT ▾ consumer with laptops and total laptops ▾ consumer with Laptop Bookings and Total Laptops

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

	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	
	Alo Arjun	Employee	20	HP	core i5	₹1,700	
Subtotal							₹14,400
Total (5)							₹15,400

Left Panel (Outline):

- Groups
 - GROUP ROWS: Add group...
 - types of version: Add group...
- GROUP COLUMNS: Add group...

Bottom Panel (Columns):

- consumer: consumer_name
- Laptop Bookings: Laptop Bookings
- Total No Of Laptops: Total Laptops
- Laptop names
- Processors
- # Amount

Buttons at the bottom: 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.

