

A CRM APPLICATION FOR LAPTOP RENTALS

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ABSTRACT

The CRM solution is built to handle key operations such as customer onboarding, laptop inventory management, rental agreements, payment tracking, and customer service support. It utilizes Salesforce's standard objects like Accounts and Contacts for customer profiles, along with custom objects for laptop inventory, rental agreements, and rental periods.

Automation plays a critical role, employing Salesforce features like Process Builder, Workflow Rules, and Apex triggers for automating common tasks, such as sending payment reminders, alerting staff when laptops are due for return, and generating renewal notifications.

Additionally, the application incorporates reporting and dashboards to offer insights into rental performance, inventory status, and customer satisfaction. The use of Salesforce's AI tools (such as Einstein Analytics) helps predict demand trends and optimize the laptop inventory to meet fluctuating customer needs.

This application provides a scalable and customizable solution for businesses in the laptop rental industry, ensuring better customer experiences, improved operational efficiency, and data-driven decision-making.

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INTRODUCTION

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.

Task 1: Object

1.1 Create Total Laptops Object

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

The screenshot shows the Salesforce Object Manager interface for a custom object named 'Total Laptops'. The left sidebar contains a list of configuration options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The 'Details' section is currently selected and expanded, showing the following configuration details:

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

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

1.2 Create Consumer Object

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

- 1) Enter the label name >> consumer
- 2) Plural label name >> consumer
- 3) Enter Record Name Label and Format
 Record Name >> consumer_name
 Data Type >> Name
2. Click on Allow reports, Allow search and Track Field History,
3. Allow search >> Save.

The screenshot shows the Salesforce Setup interface for the 'consumer' object. The left sidebar contains a 'Details' menu with 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 content area is titled 'Details' and includes an 'Edit' button and a 'Delete' button. The 'Description' field is empty. The 'API Name' is 'consumer_c'. The 'Custom' checkbox is checked. The 'Singular Label' is 'consumer'. The 'Plural Label' is 'consumer'. The 'Enable Reports' checkbox is checked. The 'Track Activities' checkbox is checked. The 'Track Field History' checkbox is checked. The 'Deployment Status' is 'Deployed'. The 'Help Settings' link is 'Standard salesforce.com Help Window'.

1.3 Create Laptop Bookings Object

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

- 1) Enter the label name >> Laptop Bookings
- 2) Plural label name >> Laptop Bookings
- 3) Enter Record Name Label and Format
 Record Name >> Laptop Bookings
 Data Type >> Name
2. Click on Allow reports, Allow search and Track Field History,
3. Allow search >> Save.

The screenshot shows the Salesforce Setup interface for the 'Laptop Bookings' object. The left sidebar contains a 'Details' menu with 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 content area is titled 'Details' and includes an 'Edit' button and a 'Delete' button. The 'Description' field is empty. The 'API Name' is 'Laptop_Bookings_c'. The 'Custom' checkbox is checked. The 'Singular Label' is 'Laptop Bookings'. The 'Plural Label' is 'Laptop Bookings'. The 'Enable Reports' checkbox is checked. The 'Track Activities' checkbox is checked. The 'Track Field History' checkbox is checked. The 'Deployment Status' is 'Deployed'. The 'Help Settings' link is 'Standard salesforce.com Help Window'.

1.4 Create Billing Process Object

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

- 1) Enter the label name >> Billing Process
- 2) Plural label name >> Billing Process
- 3) Enter Record Name Label and Format
Record Name >> Billing ProcessName
Data Type >> Name

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

The screenshot shows the Salesforce Object Manager interface for the 'Billing Process' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main content area is titled 'Details' and includes a description field, API Name (Billing_Process__c), Custom checkbox (checked), Singular Label (Billing Process), Plural Label (Billing Process), and a list of settings: Enable Reports (checked), Track Activities, Track Field History (checked), Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). There are 'Edit' and 'Delete' buttons in the top right corner.

Task 2: Tabs

2. 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.

Activity 2: Creating Remaining Tabs

Now create the Tabs for the remaining Objects, they are “consumer, Laptop Booking, Billing process”. Follow the same steps as mentioned in Activity -1 .

Setup Home Object Manager

tab

Feature Settings

Analytics

Tableau

Tableau Embedding

User Interface

Loaded Console Tab Limit

Rename Tabs and Labels

Tabs

Didn't find what you're looking for? Try using Global Search.

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 [New](#) [What Is This?](#)

Action	Label	Tab Style	Description
Edit Del	Billing Process	Credit card	
Edit Del	consumer	People	
Edit Del	Laptop Bookings	Laptop	
Edit Del	Total Laptops	Computer	

Web Tabs [New](#) [What Is This?](#)

No Web Tabs have been defined

Visualforce Tabs [New](#) [What Is This?](#)

No Visualforce Tabs have been defined

Lightning Component Tabs [New](#) [What Is This?](#)

<https://vt1185-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/home>

Task 3: The Lightning App

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

Setup Home Object Manager

Quick Find

Setup Home

Service Setup Assistant

Commerce Setup Assistant

Multi-Factor Authentication Assistant

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

Sales Cloud Everywhere

ADMINISTRATION

> Users

> Data

> Email

PLATFORM TOOLS

Lightning Experience App Manager

[New Lightning App](#) [New Connected App](#)

23 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

	App Name ↑	Developer Name	Description	Last Modified Date	App T...	Visib...
2	Lightning Experience	LightningExperience	Discover and manage business resources designed for your industry.	25/09/2024, 7:28 pm	Lightning	✓
6	Community	Community	Salesforce CRM Communities	25/09/2024, 7:28 pm	Classic	✓
7	Content	Content	Salesforce CRM Content	25/09/2024, 7:28 pm	Classic	✓
8	Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	25/09/2024, 7:28 pm	Lightning	✓
9	Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	25/09/2024, 7:28 pm	Lightning	✓
10	LAPTOP RENTALS	LAPTOP_RENTALS		26/09/2024, 12:13 am	Lightning	✓
11	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	25/09/2024, 7:28 pm	Lightning	✓
12	Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	25/09/2024, 7:28 pm	Classic	✓
13	Platform	Platform	The fundamental Lightning Platform	25/09/2024, 7:28 pm	Classic	✓
14	Queue Management	QueueManagement	Create and manage queues for your business.	25/09/2024, 7:28 pm	Lightning	✓
15	Sales	Sales	The world's most popular sales force automation (SFA) solution	25/09/2024, 7:28 pm	Classic	✓
16	Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	25/09/2024, 7:28 pm	Lightning	✓
17	Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one s...	25/09/2024, 7:28 pm	Lightning	✓
18	Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and feeds	25/09/2024, 7:28 pm	Classic	✓
19	Salesforce Scheduler Set	LightningScheduler	Set up personalized appointment scheduling	25/09/2024, 7:28 pm	Lightning	✓

Task 4: Fields

4.1 Creating The Field In Consumer Object

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

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

To create another fields in an object:

1. Go to setup >> click on Object Manager >> type object name(consumer) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as a “Email” and Click on Next
4. Fill the Above as following:
 - Field Label: Email
 - Field Name :It’s gets auto generated
 - Click on Next >> Next >> Save and new.

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.

To create another fields in an object:

1. Go to setup >> click on Object Manager >> type object name(consumer) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as a “Picklist” and Click on Next
4. Fill the Above as following:
 - Field Label: consumer Status
 - Value - Select enter values with each value separated by a new line
 - Student
 - Employee
 - Others
 - Select required
 - Field Name :It’s gets auto generated

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

Setup > Object Manager

consumer

Details

Fields & Relationships
8 Items, Sorted by Field Label

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		

4.2 Creating The Field In Laptops Bookings Object

To create fields in an object:

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

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

Setup > Object Manager

Laptop Bookings

Details

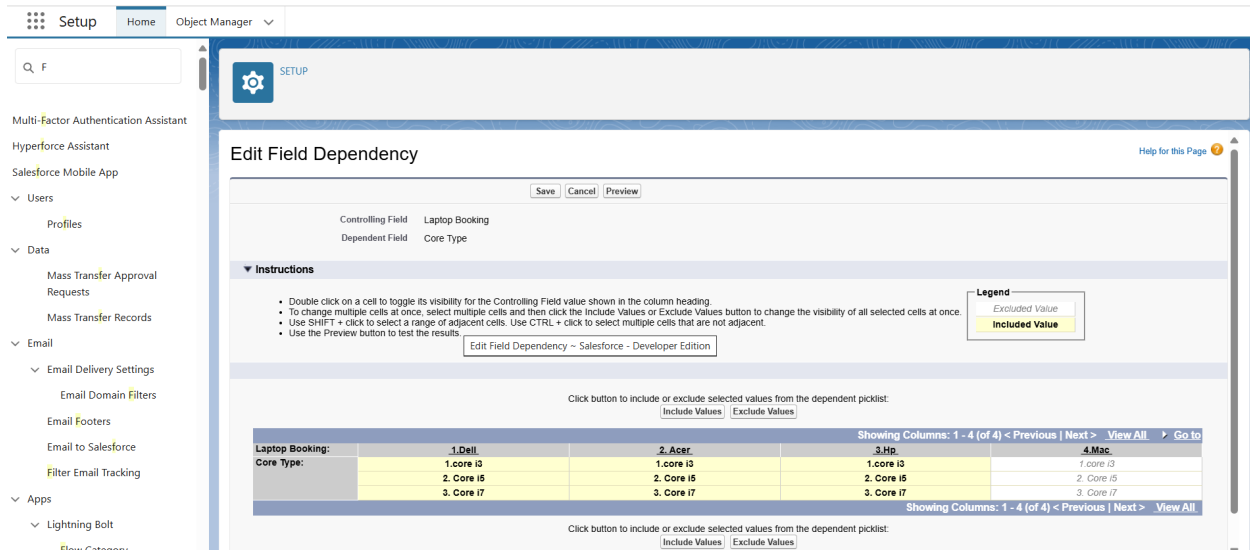
Fields & Relationships
10 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Currency(18, 0)		
Core Type	Core_Type__c	Picklist	Laptop Booking	
Created By	CreatedById	Lookup(User)		
how many months	how_many_months__c	Picklist		
Laptop Booking	Laptop_Booking__c	Picklist		
Laptop Bookings	Name	Text(80)		✓
Laptops Available	Laptops_Available__c	Formula (Number)		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Master-Detail(consumer)		✓
Total No Of Laptops	Total_No_Of_Laptops__c	Master-Detail(Total Laptop)		✓

4.3 To Create A Fields & Relationship To An Laptop Booking Object

To create fields & relationship to an object:

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



To create fields & relationship to an object:

1. Go to setup >> click on Object Manager >> type object name(Laptop Booking) in the search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data Type as a “Lookup Relationship”
4. Click on Next
5. Click on the Related to drop down and Select the “consumer” object and click on Next
6. Fill the Above as following:
 - Change the Field Label: Name
 - Field Name :It’s gets auto generated
7. Click on Next >> Next >> Save and new.

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

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
6. Click on the Related to drop down and Select the “Total Laptops” object and click on Next
 - Fill the Above as following:
 - Change the Field Label: Total No Of Laptops
 - Field Name :It’s gets auto generated
 - Click on Next >> Next >> Save and new.
4. To Create a Fields & Relationship to an Laptop Booking Object

To create fields & relationship to an object:

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

Field Label	Field Name	Data Type	Relationship
Amount	Amount__c	Currency(18, 0)	
Core Type	Core_Type__c	Picklist	Laptop Booking
Created By	CreatedById	Lookup(User)	
how many months	how_many_months__c	Picklist	
Laptop Booking	Laptop_Booking__c	Picklist	
Laptop Bookings	Name	Text(80)	✓
Laptops Available	Laptops_Available__c	Formula (Number)	
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)	✓

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

1. After Creating the Lookup Relationship Than Only you can create the Rollup Summary
2. Go to setup >> click on Object Manager >> type object name(Total Laptops) in the search bar >> click on the object.
3. Now click on “Fields & Relationships” >> New
1. 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
2. Select the Laptop Bookings in the Summarized Object
 3. Select the count Radio button in the select Roll-up Type

The screenshot shows the 'Fields & Relationships' section for the 'Total Laptops' object. The table lists 9 fields with their labels, names, data types, controlling fields, and indexed status.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Currency(18, 0)		
Created By	CreatedById	Lookup(User)		
Laptops Available	Laptops_Available__c	Formula (Number)		
Laptops delivered	Laptops_delivered__c	Roll-Up Summary (COUNT Laptop Bookings)		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Lookup(consumer)		✓
Owner	OwnerId	Lookup(User,Group)		✓
Total Laptops	Name	Text(80)		✓
Total No Of Laptops	Total_No_Of_Laptops__c	Lookup(Total Laptops)		✓

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Laptop Booking) in the search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as a “Formula” and Click on Next
4. Fill the Above as following:
 - Field Label: Laptops Available
 - Field Name : It’s gets auto generated
 - Select the Formula Return Type as “Number”
 - Select the Decimal places as “0” and Click on Next
 - Click on the Advanced Formula and Enter the value in formula box “ 50 - ” and Click on insert field then 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

The screenshot shows the 'Formula Options' dialog for creating a new formula field. The 'Formula Return Type' is set to 'Number' and 'Decimal Places' is set to '0'. The 'Advanced Formula' tab is selected, and the formula editor shows the formula: `50 - Total_No_Of_Laptops__r.Laptops_delivered__c`. A 'Functions' list is open on the right, showing various functions like ABS, ACOS, ADDMONTHS, etc.

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

To create fields in an object:

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

SETUP > OBJECT MANAGER
Laptop Bookings

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

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

4.4 Creation Of Fields & Relationship For Billing Process Object

1. To create fields & relationship to an object:

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

2. To create another fields & relationship to an object:

1. Go to setup >> click on Object Manager >> type object name(Billing Process) in the search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data Type as a “Lookup Relationship”
4. Click on Next
5. Click on the Related to drop down and Select the Laptop Booking object and click on Next
6. Fill the Above as following:
 - Change the Field Label: Laptop Booking
 - Field Name :It’s gets auto generated

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

3. Creation of another fields for the billing process object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Billing Process) in the search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data Type as a “Picklist”
4. Fill the Above as following:
 - Field Label: Payment Mode
 - Value >> Select enter values with each value separated by a new line
 1. Cash
 2. Check
 3. Credit card
 4. Debit card
 5. UPI
 6. Phonepe
 7. Gpay
 8. Paytm
 - Select required
- Click on Next >> Next >> Save and new.

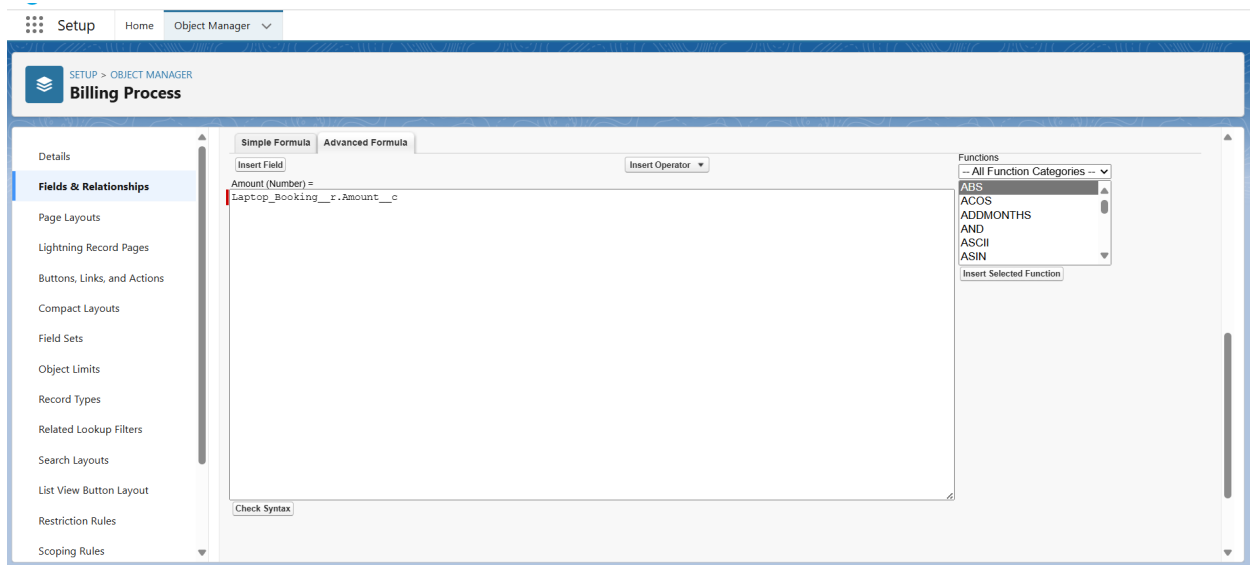
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Number)		
Billing ProcessName	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Laptop Booking	Laptop_Booking__c	Lookup(Laptop Bookings)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Master-Detail(consumer)		✓
Payment Mode	Payment_Mode__c	Picklist		

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

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

Next.(Formula return type Number).

6. In the Advanced Formula Click on the Insert field in the popup Screen Select the Billing Process and in the second drop down select the Laptop Booking and in the three drop down select the Amount field and click on Insert
7. “Laptop_Booking__r.Amount__c”.
8. Click on the Check syntax: No syntax errors in merge fields.



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

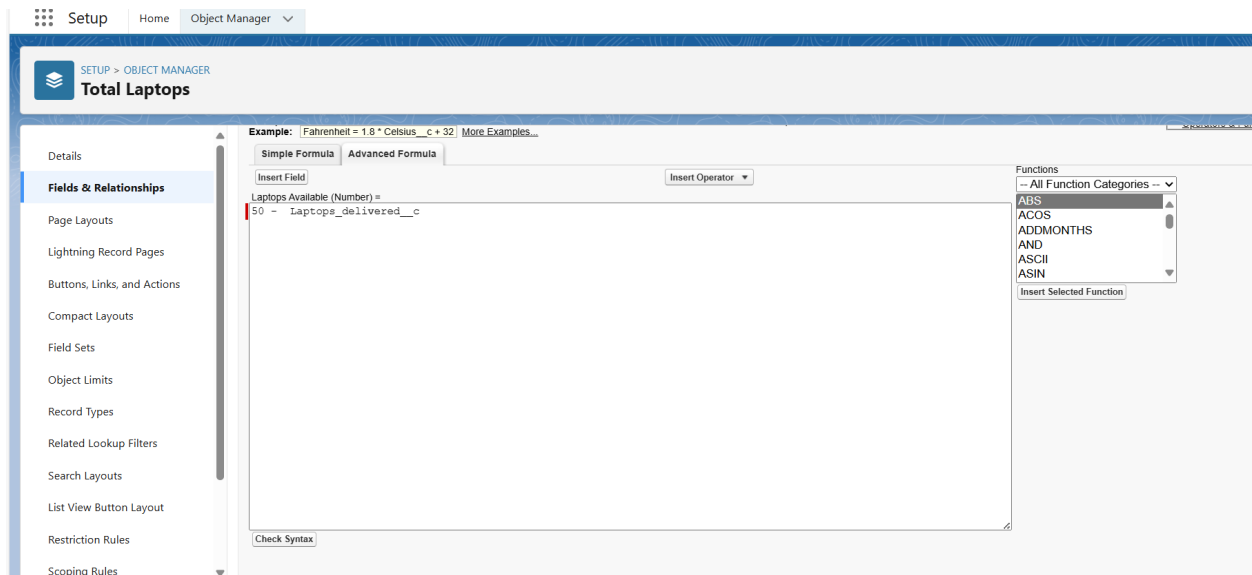
4.5 Creating The Field In Total Laptops Object

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

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

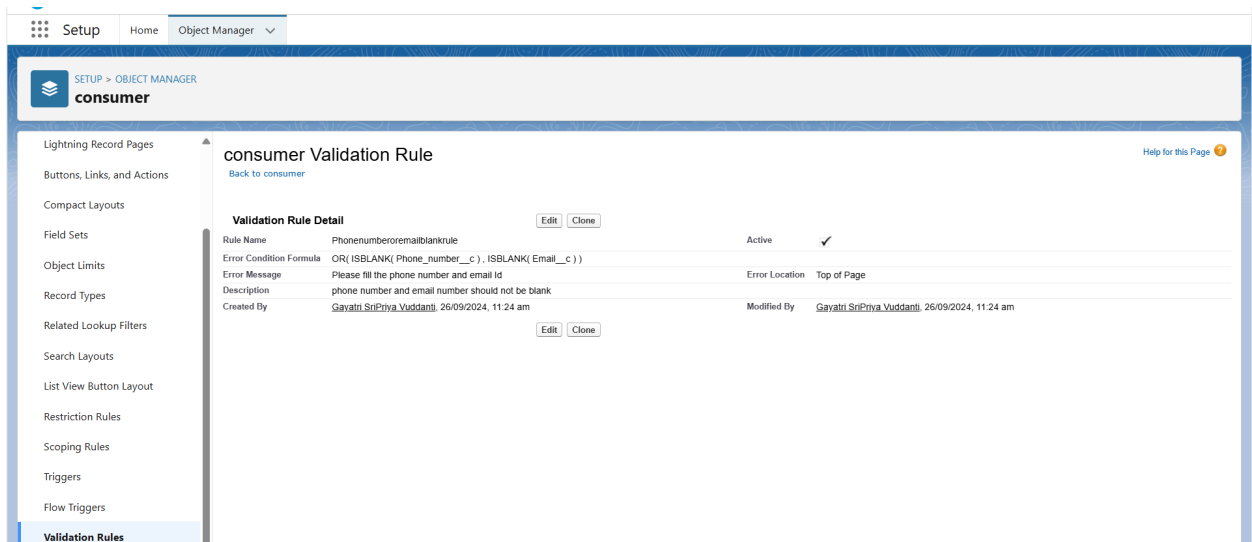
1. Click on the Advanced
2. Formula “ 50 - Laptops_delivered__c ” and Check Syntax
1. Click on Next >>Next >>Save and new.



Task 5: Validation Rule

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.
7. Save the validation rule.



Task 6: Profiles

6.1 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 it.

The screenshot displays the Salesforce Setup interface for the 'Profiles' section. The left sidebar shows the navigation menu with 'Profiles' selected under 'Users'. The main content area is divided into two sections: 'Profile Detail' and 'Standard Object Permissions'.

Profile Detail:

- Name: owner
- User License: Salesforce
- Description: Custom Profile
- Created By: Gayatri.SriPriva.Vuddanti, 26/09/2024, 11:26 am
- Modified By: Gayatri.SriPriva.Vuddanti, 26/09/2024, 11:53 am

Page Layouts:

Standard Object Layouts	Global	Location Group Assignment
Global	Global Layout [View Assignment]	Location Group Assignment Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Macro [View Assignment]
Home Page Layout	DE Default [View Assignment]	Object Milestone Layout [View Assignment]
Account	Account Layout [View Assignment]	Operating Hours Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Opportunity Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]	Opportunity Product Layout [View Assignment]
Asset	Asset Layout [View Assignment]	Order Layout [View Assignment]
Asset Action	Asset Action Layout [View Assignment]	Order Product Layout [View Assignment]
Asset Action Source	Asset Action Source Layout [View Assignment]	Payment Layout [View Assignment]
Asset Relationship	Asset Relationship Layout [View Assignment]	Payment Authorization Layout [View Assignment]
Asset State Period	Asset State Period Layout [View Assignment]	Payment Authorization Adjustment Layout [View Assignment]

Standard Object Permissions:

	Basic Access				Data Administration			Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All		Read	Create	Edit	Delete	View All	Modify All
Accounts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Messaging Sessions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Addresses	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Messaging Users	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AI Insight Reasons	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Operating Hours	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AI Record Insights	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Opportunities	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Alternative Payment Methods	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Orders	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
API Anomaly Event Stores	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Party Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
App Analytics Query Requests	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Payments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Application Usage Assignments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Payment Authorizations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Appointment Categories	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Payment Authorization Adjustments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Appointment Invitations	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Payment Gateways	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Appointment Schedule Aggregates	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Payment Gateway Logs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Appointment Schedule Logs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Payment Groups	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

6.2 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 it.

The screenshot shows the Salesforce Setup page for Profiles. The left sidebar has a search bar with 'pro' and a list of categories: Users, Profiles, Data, Feature Settings, Data.com, Marketing, Sales, and Products. The 'Profiles' category is selected. The main content area shows the 'Profiles' page with a table of permissions for various objects. The 'Billing Process' and 'Laptop Bookings' objects are highlighted with checkmarks in the 'Read', 'Create', 'Edit', and 'Delete' columns. The 'Session Settings' and 'Password Policies' sections are also visible.

Task 7: Roles & 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.
5. Activity 2: Creating Agent roles

Creating another two roles under manager

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.

The screenshot shows the Salesforce Setup page for Roles. The left sidebar has a search bar with 'roles' and a list of categories: Users, Roles, Feature Settings, Sales, Service, Case Teams, and Cases. The 'Roles' category is selected. The main content area shows the 'Roles' page with a tree view of the role hierarchy. The 'owner' role is highlighted, and the 'Agent' role is added under it. The 'SVP, Customer Service & Support' role is also visible.

Task 8: 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.

Activity 2: creating another users

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

The screenshot displays the Salesforce Setup page for user management. The left sidebar shows the navigation menu with 'Users' selected under 'User Management Settings'. The main content area is titled 'All Users' and includes a search bar, a 'View' dropdown set to 'All Users', and a table of existing users. The table has columns for Action, Full Name, Alias, Username, Role, Active status, and Profile. The users listed are Chatter Expert, ram_ram, User Integration, User Security, Vuddanti Gayatri SriPriya, and y_vicky. The 'y_vicky' user is highlighted, showing a role of 'owner' and the 'owner' profile.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00dy0000cwkof6map.rn2zwwhot0mu@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	ram_ram	ram	ammw25@gmail.com	Agent	✓	Standard Platform User
<input type="checkbox"/> Edit	User Integration	integ	integration@00dy0000cwkof6map.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightssecurity@00dy0000cwkof6map.com		✓	Analytics Cloud Security User
<input type="checkbox"/> Edit	Vuddanti Gayatri SriPriya	Gvudd	pvya@230.com		✓	System Administrator
<input type="checkbox"/> Edit	y_vicky	yy	pvya25@gmail.com	owner	✓	owner

Task 9: Flows

9.1 Create A Flow On Dell Laptop

Activity -

1. Go to setup >> type Flow in quick find box >> Click on the Flow and Select the New Flow.
2. Select the Record-triggered flow and Click on Create.
3. Select the Object as a Laptop Booking in the Drop down list.
4. Select the Trigger Flow when: "A record is Created or Updated".
5. Select the Optimize the flow for: "Actions and Related Records" and Click on Done.
6. Under the Record-triggered Flow Click on "+" Symbol and In the Drop down List select the "Decision Element".
7. Enter the Details Label: Field should be Update, API name: Gets Automatically Generated.
8. Enter the Outcome Details Label: dell , Outcome API name: Gets Automatically Generated.
 - Resource: Select Record.Laptop booking__c.
 - Operator: Select Equals.
 - Value: Select dell
 - Add the same outcome order to acer , hp,mac.
 - Click done.
9. Go to flow page
10. Beside dell there is a symbol '+' click on that.
11. Again select decision
12. Enter the Details Label: Field should Update(any one u want), API name: Gets
13. Automatically Generated.
select the Outcome Details Label: dell core i3 , Outcome API name: Gets Automatically Generated.
 - Resource: Select Record.core type.
 - Operator: Select Equals.
 - Value: Select core i3.
 - Then again click the symbol '+' outcome details
- select the Outcome '+' Details Label: dell core i5 , Outcome API name: Gets Automatically Generated.
 - Resource: Select Record.core type.
 - Operator: Select Equals.
 - Value: Select core i5.
 - Then again click the symbol '+' outcome details
- Enter the Outcome Details Label: dell core i7 , Outcome API name: Gets Automatically Generated.
 - Resource: Select Record.core type.
 - Operator: Select Equals.

- Value: Select core i7.
14. Click done.
15. So go to the flow page select '+' after core i3 then again select the decision.
16. Enter the Details Label: months selected , API name: Gets Automatically Generated.
17. Enter the Outcome Details Label: dell 1(i3) , Outcome API name: Gets Automatically Generated.
- Resource: Select Record.how many months.
 - Operator: Select Equals.
 - Value: 1.
18. Enter the Outcome Details Label: dell 2(i3) , Outcome API name: Gets Automatically Generated.
- Resource: Select Record.how many months.
 - Operator: Select Equals.
 - Value: Select 2..
19. Click '+' outcome details
20. Enter the Outcome Details Label: dell 3(i3) , Outcome API name: Gets Automatically Generated.
- Resource: Select Record.how many months.
 - Operator: Select Equals.
 - Value: Select 3..
21. Click '+' outcome details
22. Enter the Outcome Details Label: dell 4(i3) , Outcome API name: Gets Automatically Generated.
- Resource: Select Record.how many months.
 - Operator: Select Equals.
 - Value: Select 4..
23. Click '+' outcome details
24. Enter the Outcome Details Label: dell 5(i3) , Outcome API name: Gets Automatically Generated.
- Resource: Select Record.how many months.
 - Operator: Select Equals.
 - Value: Select 4.
25. Follow the above picture you will understand.
26. After dell 1(i3) there is '+' symbol like dell 2(i3),dell 3(i3),dell 4(i3),dell 5(i3).
27. Click on '+' then select update records
28. Enter the Details Label: one month of dell i3 rate , API name: Gets Automatically Generated.
29. Field:- Amount__c , value:- for dell 1(i3)-1000, dell 2(i3)-2000, dell 3(i3)-3000, dell 4(i3)-4000, dell 5(i3)-5000. Follow for all these finally
30. Click done.
31. Enter the Details Label: months selected , API name: Gets Automatically Generated.
32. Enter the Outcome Details Label: dell 1(i7) , Outcome API name: Gets Automatically Generated.
- Resource: Select Record.how many months.
 - Operator: Select Equals.

- Value: 1.
- 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..

33. Click '+' outcome details

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

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

35. Click '+' outcome details

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

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

37. Click '+' outcome details

- Enter the Outcome Details Label: dell 5(i7) , Outcome API name: Gets Automatically Generated.Resource: Select Record.how many months.
- Operator: Select Equals.
- Value: Select 5.

38. Follow the above picture you will understand.

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

40. Click on '+' then select update records

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

42.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

43.Click done.

9.2 Creating Flow On Acer Laptop

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

Click done.

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

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

Click done.

19. After acer 1(i3) there is '+' symbol like acer 2(i3),acer 3(i3),acer 4(i3),acer 5(i3).
20. Click on '+' then select update records
21. Enter the Details Label: one month of acer i3 rate , API name: Gets Automatically Generated.
22. Field:- Amount__c , value:- for acer 1(i3)-900, acer 2(i3)-1800, acer 3(i3)-2700, acer 4(i3)-3600, acer 5(i3)-4800. Follow for all these finally
23.
 - Click done.

9.3 Creating A Flow On Hp Laptop

1. Go to flow page
2. Beside hp there is a symbol '+' click on that.
3. Again select decision
4. Enter the Details Label: Field is Update, API name: Gets Automatically Generated.

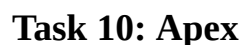
5. select the Outcome Details Label: hp core i5 , Outcome API name: Gets Automatically Generated.
 - Resource: Select Record.core type.
 - Operator: Select Equals.
 - Value: Select hp i5.
 6. Go to flow page
 7. Beside hp there is a symbol '+' click on that.
 8. Again select decision
 9. Enter the Details Label: hp field should be updated , API name: Gets Automatically Generated.
 10. Enter the Outcome Details Label: hp 1(i5) , Outcome API name: Gets Automatically Generated.
 11.
 - Resource: Select Record.how many months.
 - Operator: Select Equals.
 - Value: 1.
 12. Enter the Outcome Details Label: hp 2(i5) , Outcome API name: Gets Automatically Generated.
 - Resource: Select Record.how many months.
 - Operator: Select Equals.
 - Value: Select 2..
 13. Click '+' outcome details
 14. Enter the Outcome Details Label: hp 3(i5) , Outcome API name: Gets Automatically Generated.
 - Resource: Select Record.how many months.
 - Operator: Select Equals.
 - Value: Select 3..
 15. Click '+' outcome details
 16. Enter the Outcome Details Label: hp 4(i5) , Outcome API name: Gets Automatically Generated.
 - Resource: Select Record.how many months.
 - Operator: Select Equals.
 - Value: Select 4.
 17. Click '+' outcome details
 18. Enter the Outcome Details Label: hp 5(i5) , Outcome API name: Gets Automatically Generated.
 - Resource: Select Record.how many months.
 - Operator: Select Equals.
 - Value: Select 5.
- Click on done.
19. After hp 1(i5) there is '+' symbol like hp 2(i5), hp 3(i5), hp 4(i5),hp 5(i5).
 20. Click on '+' then select update records
 21. Enter the Details Label: one month of hp i5 rate , API name: Gets Automatically Generated.
 22. Field:- Amount__c , value:- for hp 1(i5)-1700, hp 2(i5)-3400, hp 3(i5)-5100, hp

4(i5)-6800, hp 5(i5)-8500. Follow for all these finally .
Click done.

9.4 Creating A Flow On Mac Laptop

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

- FLOW:**



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

```
public class LaptopBookingHandler {
    public static void sendEmailNotification (List<Laptop_Bookings__c> lapList){
        for(Laptop_Bookings__c lap:lapList)
        {
            Messaging.SingleEmailMessage email = new Messaging.SingleEmailMessage();
            email.setToAddresses( new List<String>{lap.Email__c});
        }
    }
}
```

```

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

```

Note:-

- 1.Class name:- LaptopBookingHandler
- 2.API Name:- Laptop_Bookings__c(as per your org go to laptop booking object and copy from that).
- 3.core__c (as per your org go to laptop booking object and copy from that).
- 4.Laptop_type__c.(as per your org go to laptop booking object and copy from that).

```

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

```

How to create a new trigger :

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

Syntax For creating trigger :

The syntax for creating trigger is :

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

```
{  
}
```

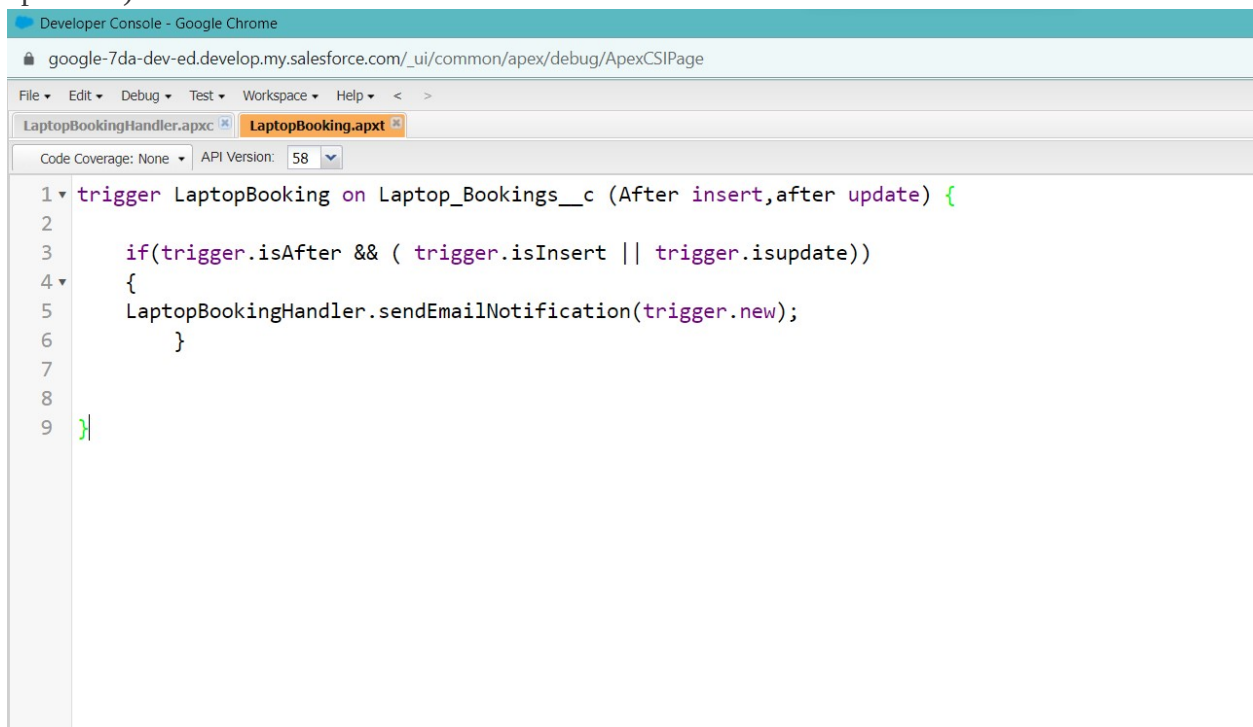
Trigger code:

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

Note:- copy the API names

1.LaptopBooking - trigger name

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



Task 11: Reports

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

Click apply it.

LAPTOP RENTALS Total Laptops consumer Laptop Bookings Billing Process *** Report Builder** * consumer with laptop boo... * data analytics of laptops Analytics

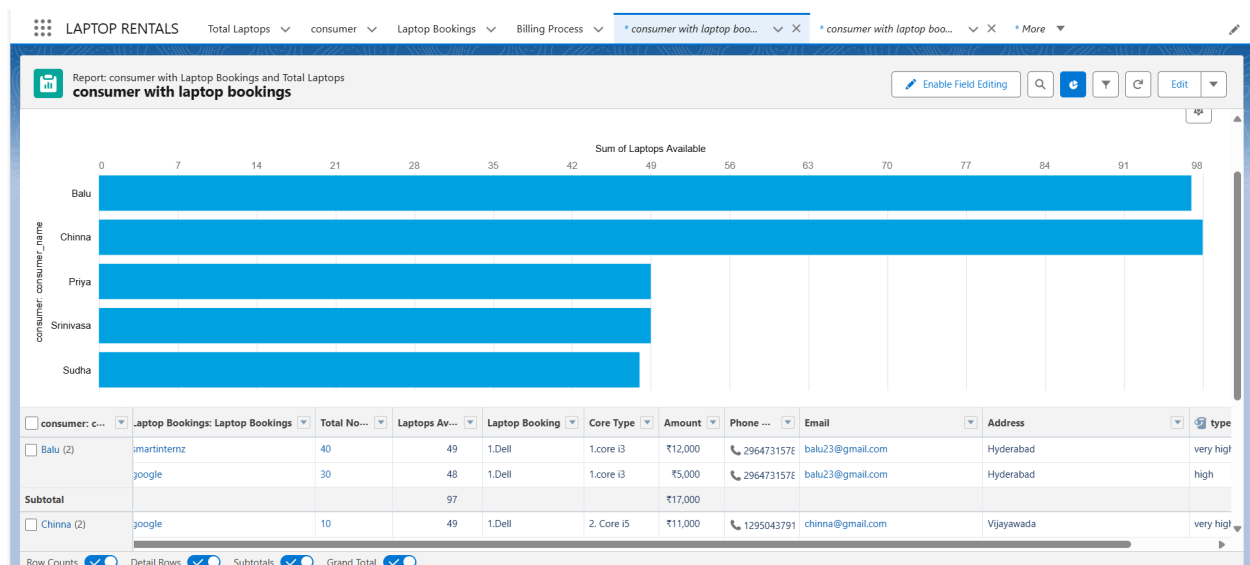
REPORT consumer with laptop bookings consumer with Laptop Bookings and Total Laptops

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

consumer: cons...	Laptop Bookings: Laptop Bookings	Total No...	Laptops Av...	Laptop Booking	Core Type	Amount	Phone ...	Email	Address
Balu (2)	smartinternz	40	49	1.Dell	1.core i3	₹12,000	296473157	balu23@gmail.com	Hyderabad
	google	30	48	1.Dell	1.core i3	₹5,000	296473157	balu23@gmail.com	Hyderabad
Subtotal			97			₹17,000			
Chinna (2)	google	10	49	1.Dell	2. Core i5	₹11,000	1295043791	chinna@gmail.com	Vijayawad.
	google	20	49	2. Acer	2. Core i5	₹5,500	1295043791	chinna@gmail.com	Vijayawad.
Subtotal			98			₹16,500			
Priya (1)	google	50	49	3.Hp	1.core i3	₹9,000	7989150391	gayatrisripriyavuddanti@gmail.com	32-2-140,

Columns: Laptop Bookings: Laptop Bookin X, Total No Of Laptops: Total Laptc X, # Laptops Available X, Laptop Booking X, Core Type X, # Amount X

Subtotals Grand Total



11.2 Sharing Report To Owner

- 1.Click edit drop down and select subscribe option
- 2.After selecting the run report as a “another person” select your personal account or whom you want to send that mail to.

LAPTOP RENTALS Total Laptops consumer Laptop Bookings Billing Process * consumer with laptop boo... * consumer with laptop boo... * More

Report: consumer with Laptop Bookings and Total Laptops consumer with laptop bookings

Enable Field Editing

Sum of Laptops Available

Edit Subscription

Settings

Frequency: **Daily** Weekly Monthly

Time: 8:00 am

Attachment: Attach File

Recipients: To add other recipients to this subscription, make sure the report is saved in a shared folder. Learn More

Run Report As: **Me** Another Person

Conditions: In addition to subscribing, you can set up conditions on this report. You will be notified when conditions are met. This is optional.

Unsubscribe Cancel Save

- 3.Click save.

Task 12: Dashboards

12.1 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.

12.2 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.
- 5.Select the dark component and add to the dashboards.
- 6.Save it.
- 7.Click done.

The screenshot displays the SAP Dashboard Builder interface. The top section shows a list of recent dashboards with columns for Dashboard Name, Description, Folder, Created By, Created On, and Subscribed. The dashboard 'data analytics of laptops' is highlighted, showing its description 'total amount of data in dashboards' and folder 'total rent amount'.

Below the list, the dashboard preview is shown. The dashboard title is 'data analytics of laptops' with the subtitle 'total amount of data in dashboards'. The preview includes a donut chart titled 'consumer with laptop bookings' showing the 'Sum of Laptops Available' for different consumers. The total value is 341.

consumer_name	Sum of Laptops Available
Batu	97
Chinna	98
Priya	49
Srinivasa	49
Sudha	48

The dashboard also includes a legend for the consumers and a 'View Report' link.