

PROJECT REPORT

ON

A CRM APPLICATION

FOR

LAPTOP RENTALS

Submitted By:

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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.

Creating a Developer Account in Salesforce:

To create a developer organization in Salesforce, follow these steps:

1. Go to [<https://developer.salesforce.com/signup>]

The screenshot shows the "Sign up for your Salesforce Developer Edition" page. The heading is "Sign up for your Salesforce Developer Edition" followed by the subtext "A Salesforce Platform environment for free." Below this, a message says "Complete the form to get access to the Salesforce Developer Edition." The form fields are as follows:

- First Name*: Jammu
- Last Name*: Pavan Kumar
- Email*: 21501a0567@pvpsit.ac.in
- Role*: Developer
- Company*: PVPSIT
- Country/Region*: India
- State/Province*: Andhra Pradesh
- Postal Code*: 520007
- Username*: pavan1214@company.com

Below the username field, there is a note: "Your username must be in the form of an email address (it does not have to be real). It must be unique and cannot be associated with another Salesforce login credential. [Read more about username recommendations.](#)" There is also a checked checkbox: "I agree to the [Main Services Agreement – Developer Services](#) and [Salesforce Program Agreement](#).

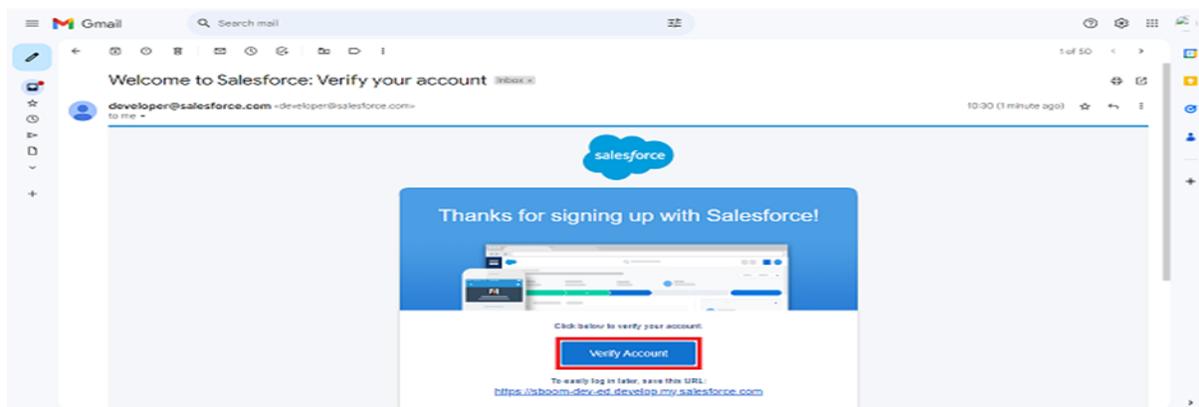
2. Complete the sign-up form with the following details:

- **First Name** and **Last Name**
- **Email Address**
- **Role**: Developer
- **Company**: College Name
- **Country**: India
- **Postal Code**: Enter your pin code
- **Username**: This should be a combination of your name and company. It does not need to be a valid email address; you can use a format like `username@organization.com`.

3. After entering the required information, click on the "Sign Me Up" button to complete the registration process.

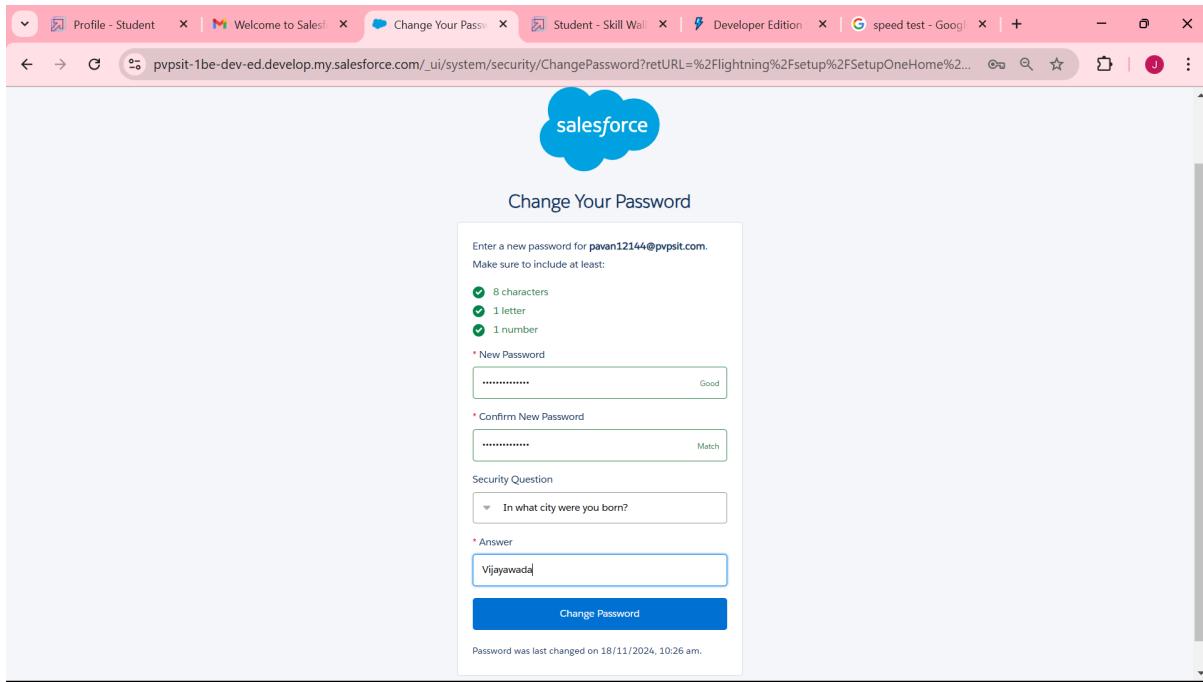
Account Activation:

1. Check the inbox of the email address you used during the sign-up process. Look for an email from Salesforce and click on the **Verify Account** link to activate your account. Note that the email might take 5-10 minutes to arrive.

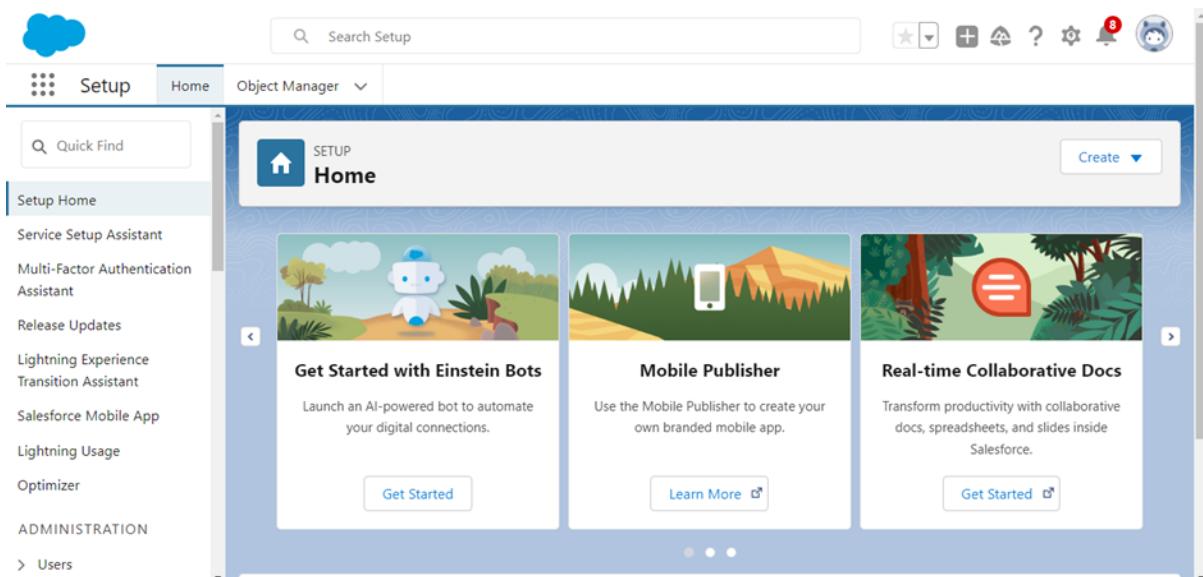


2. Click on **Verify Account** within the email.

3. Set a password and answer a security question, then click on **Change Password** to finalize your setup



4. You will be redirected to your Salesforce setup page, where you can begin using your new developer account.



Object Creation:

What Is an Object?

Salesforce objects are database tables that permit you to store data that is specific to an organization.

What are the types of Salesforce objects?

Salesforce objects are of two types:

1. **Standard Objects:** Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
2. **Custom Objects:** Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

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.

Custom Object Definition Edit

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label: Example: Account

Plural Label: Example: Accounts

Starts with vowel sound:

The Object Name is used when referencing the object via the API.

Object Name: Example: Account

Description:

Context-Sensitive Help Setting

- Open the standard Salesforce.com Help & Training window
- Open a window using a Visualforce page

Content Name:

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.

New Custom Object

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more](#) [Don't show this message again](#)

Custom Object Definition Edit

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label: Example: Account

Plural Label: Example: Accounts

Starts with vowel sound:

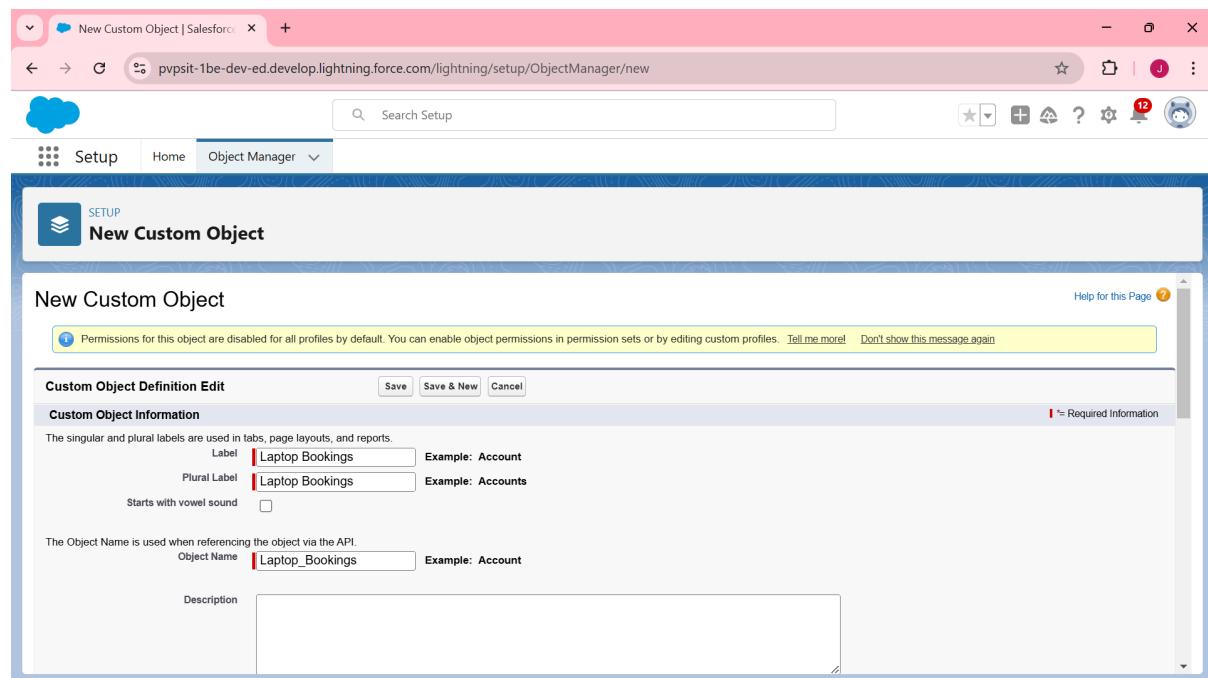
The Object Name is used when referencing the object via the API.

Object Name: Example: Account

Description:

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 >> Laptop Bookings
Data Type >> Name
- Click on Allow reports,Allow search and Track Field History,
- Allow search >> Save.



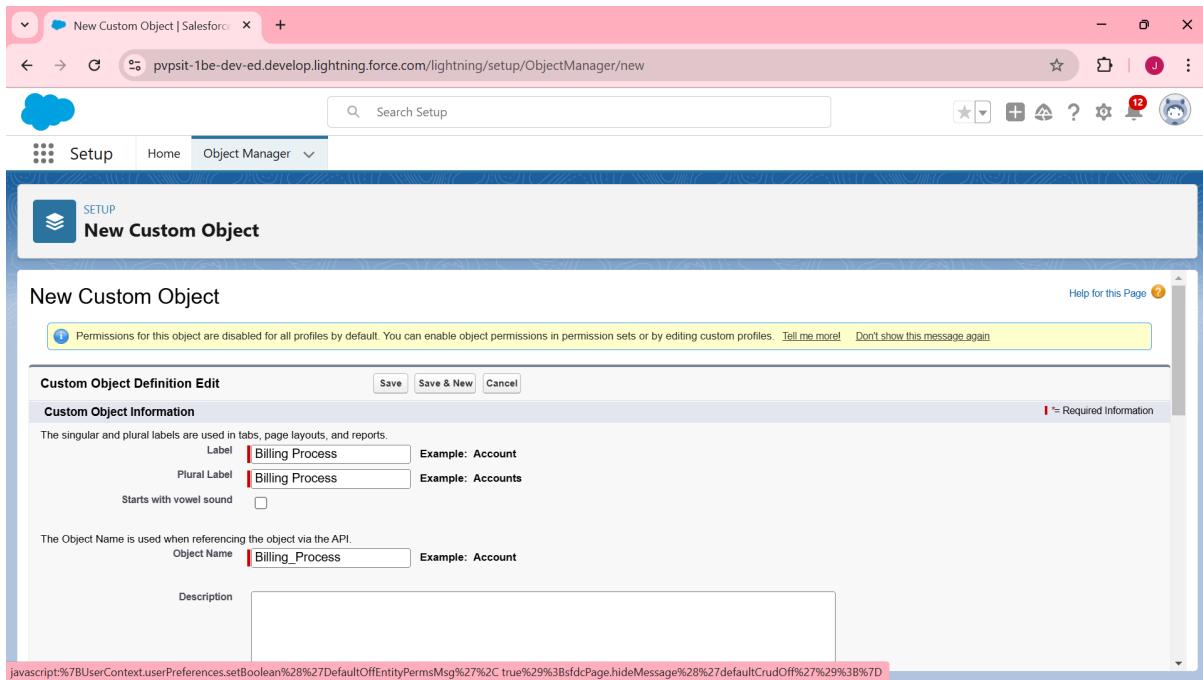
Create Billing Process Object

- From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
- Enter the label name >> Billing Process
- Plural label name >> Billing Process

- Enter Record Name Label and Format Record Name >> Billing Process Data

Type >> Name

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



Tabs:

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.

Repeat the steps outlined above to create tabs for the remaining objects:

- **Consumer**
- **Laptop Bookings**
- **Billing Process**

Profile - Student | Welcome to Salesforce | Home | Salesforce | Student - Skill Wall | Tabs | Salesforce | speed test - Google

vpsit-1be-dev-ed.lightning.force.com/lightning/setup/CustomTabs/home

Setup Home Object Manager

tabs

User Interface

Rename Tabs and Labels

Tabs

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

SETUP Tabs

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality. Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs

No Custom Object Tabs have been defined

Web Tabs

No Web Tabs have been defined

Visualforce Tabs

No Visualforce Tabs have been defined

Lightning Component Tabs

New What Is This?

Help for this Page

Profile - Student | Welcome to Salesforce | Home | Salesforce | Student - Skill Wall | Tabs | Salesforce | speed test - Google

vpsit-1be-dev-ed.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3FretUR...

Setup Home Object Manager

tabs

User Interface

Rename Tabs and Labels

Tabs

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

SETUP Tabs

Choose the custom object for this new custom tab. Fill in other details.

New Custom Object Tab

Select an existing custom object or [create a new custom object now](#).

Object: Total Laptops

Tab Style: Laptop

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link: --None--

Enter a short description.

Description:

Next Cancel

Profile - Student | Welcome to Salesforce | Home | Salesforce | Student - Skill Wall | Tabs | Salesforce | speed test - Google

vpsit-1be-dev-ed.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3FretUR...

Setup Home Object Manager

tabs

User Interface

Rename Tabs and Labels

Tabs

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

SETUP Tabs

Choose the custom object for this new custom tab. Fill in other details.

New Custom Object Tab

Select an existing custom object or [create a new custom object now](#).

Object: consumer

Tab Style: People

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link: --None--

Enter a short description.

Description:

Next Cancel

The Lightning App:

An app is a collection of items that work together to serve a particular function. In

The image consists of three vertically stacked screenshots of the Salesforce Setup interface, specifically the 'Custom Tabs' section.

Screenshot 1: Shows the 'New Custom Object Tab' configuration page. The 'Object' dropdown is set to 'Billing Process' and the 'Tab Style' is 'Shopping Cart'. The 'Description' field is empty. A note at the bottom says '(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.' A 'Splash Page Custom Link' dropdown is set to '--None--'. A 'Next' button is visible at the bottom right.

Screenshot 2: Shows the same configuration page but with 'Object' set to 'Laptop Bookings' and 'Tab Style' set to 'Presenter'. The 'Description' field is empty. The 'Splash Page Custom Link' dropdown is still set to '--None--'. A 'Next' button is visible at the bottom right.

Screenshot 3: Shows the 'Custom Tabs' summary page. It displays a table of existing custom tabs:

Action	Label	Tab Style	Description
Edit Del	Billing.Process	Shopping Cart	
Edit Del	consumer	People	
Edit Del	Laptop.Bookings	Presenter	
Edit Del	Total.Laptops	Laptop	

Below this table is a section titled 'Web Tabs' which states 'No Web Tabs have been defined'.

Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar. Lightning apps let you brand your apps with a custom color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your org can work more efficiently by easily switching between apps.

Create a Lightning App

To create a lightning app page:

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

The screenshot shows the Salesforce Lightning Experience App Manager interface. The top navigation bar includes links for Profile - Student, Welcome to Sales!, Home | Salesforce, Student - Skill Wall, App Manager | Sales, speed test - Google, and several others. The main header says "SETUP Lightning Experience App Manager". A search bar at the top right contains the placeholder "Search Setup". Below the header, there's a toolbar with icons for New Lightning App, New Connected App, and other setup functions. On the left, a sidebar titled "Setup" has a "Search" field containing "app mana" and a "Apps" section with a tree view showing "App Manager" (selected), "External Client Apps", and "External Client App Manager". A message below the tree says "Didn't find what you're looking for? Try using Global Search.". The main content area displays a table of 23 installed apps, sorted by App Name. The columns are: App Name, Developer Name, Description, Last Modified, App Type, and a dropdown menu icon. The table rows are as follows:

App Name	Developer Name	Description	Last Modified	App Type	Action
All Tabs	AllTabSet	Build CRM Analytics dashboards and apps	18/11/2024, 9:49 am	Classic	dropdown
Analytics Studio	Insights	Build CRM Analytics dashboards and apps	18/11/2024, 9:49 am	Classic	dropdown
App Launcher	AppLauncher	App Launcher tabs	18/11/2024, 9:49 am	Classic	dropdown
Automation	FlowsApp	Automate business processes and repetitive tasks.	18/11/2024, 9:55 am	Lightning	dropdown
Bolt Solutions	LightningBolt	Discover and manage business solutions design...	18/11/2024, 9:52 am	Lightning	dropdown
Business Rules Engine	ExpressionSetConsole	Create and maintain business rules that perform...	18/11/2024, 9:49 am	Lightning	dropdown
Community	Community	Salesforce CRM Communities	18/11/2024, 9:49 am	Classic	dropdown
Content	Content	Salesforce CRM Content	18/11/2024, 9:49 am	Classic	dropdown
Data Manager	DataManager	Use Data Manager to view limits, monitor usage...	18/11/2024, 9:49 am	Lightning	dropdown
Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	18/11/2024, 9:49 am	Lightning	dropdown
Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning ...	18/11/2024, 9:49 am	Lightning	dropdown

New Lightning App

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

* App Name

* Developer Name

Description

App Branding

Image  Primary Color Hex Value

Org Theme Options Use the app's image and color instead of the

Next

New Lightning App

App Options

Navigation and Form Factor

* Navigation Style Standard navigation Console navigation

* Supported Form Factors Desktop and phone Desktop Phone

Setup and Personalization

Setup Experience Setup (full set of Setup options) Service Setup

App Personalization Settings Disable end user personalization of nav items in this app Disable temporary tabs for items outside of this app Use Omni-Channel sidebar

Back **Next**

New Lightning App

Utility Items (Desktop Only)

Give your users quick access to productivity tools and add background utility items to your app.

Add Utility Item Utility Bar Alignment

The utility bar is a fixed footer that opens components in docked panels. Available only when the app is viewed in Lightning Experience on a desktop.

Back **Next**

New Lightning App

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items

Selected Items

Back Next

User Profiles

Choose the user profiles that can access this app.

Available Profiles

Selected Profiles

Back Save & Finish

Profile - Student | Welcome to Salesforce | Home | Salesforce | Student - Skill Wall | App Manager | Sales | laptop images - Google | - | +

vpsit-1be-dev-ed.lightning.force.com/lightning/setup/NavigationMenus/home

Cloud icon Setup Home Object Manager

Search Setup

Lightning Experience App Manager

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

App Name ↑	Developer Name	Description	Last Modified ...	Ap... ↓	Vi... ↓
Analytics Studio	Insights	Build CRM Analytics dashboards and apps	18/11/2024, 9:49 am	Classic	✓
App Launcher	AppLauncher	App Launcher tabs	18/11/2024, 9:49 am	Classic	✓
Automation	FlowsApp	Automate business processes and repetitive tas...	18/11/2024, 9:55 am	Lightning	✓
Bolt Solutions	LightningBolt	Discover and manage business solutions design...	18/11/2024, 9:52 am	Lightning	✓
Business Rules Engi...	ExpressionSetConsole	Create and maintain business rules that perform...	18/11/2024, 9:49 am	Lightning	✓
Community	Community	Salesforce CRM Communities	18/11/2024, 9:49 am	Classic	✓
Content	Content	Salesforce CRM Content	18/11/2024, 9:49 am	Classic	✓
Data Manager	DataManager	Use Data Manager to view limits, monitor usage...	18/11/2024, 9:49 am	Lightning	✓
Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	18/11/2024, 9:49 am	Lightning	✓
LAPTOP RENTALS	LAPTOP_RENTALS		18/11/2024, 11:06 am	Lightning	✓
Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning ...	18/11/2024, 9:49 am	Lightning	✓

Fields:

When we talk about Salesforce, Fields represent the data stored in the columns of a

relational database. It can also hold any valuable information that you require for a specific object. Hence, the overall searching, deletion, and editing of the records become simpler and quicker.

Types of Fields:

1. Standard Fields
2. Custom Fields

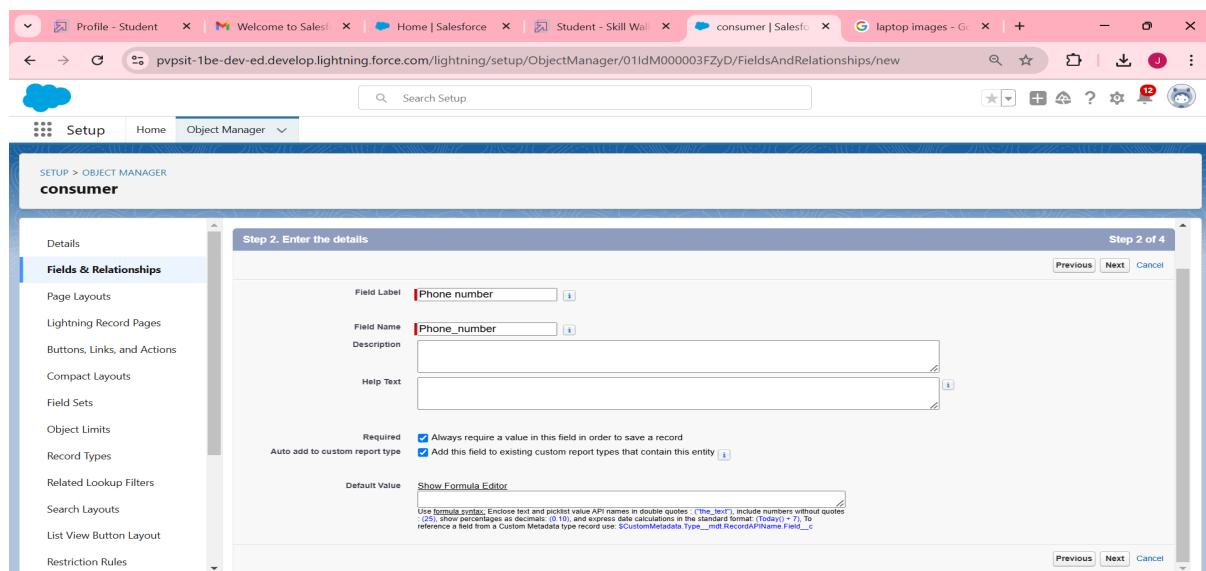
Standard Fields: As the name suggests, the Standard Fields are the predefined fields in Salesforce that perform a standard task. The main point is that you can't simply delete a Standard Field until it is a non-required standard field. Otherwise, users have the option to delete them at any point from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

Custom Fields: On the other side of the coin, Custom Fields are highly flexible, and users can change them according to requirements. Moreover, each organizer or company can use them if necessary. It means you need not always include them in the records, unlike Standard fields. Hence, the final decision depends on the user, and he can add/remove Custom Fields of any given form.

Creating the field in consumer object :

To create fields in an object:

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



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

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

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 and new
7. Go to setup >> click on Object Manager >> type object name(Laptop Booking) in the search bar >> click on the object.
8. click field dependency and next
9. 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 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

Cash
Check
Credit card
Debit card
UPI
Phonepe
Gpay
Paytm

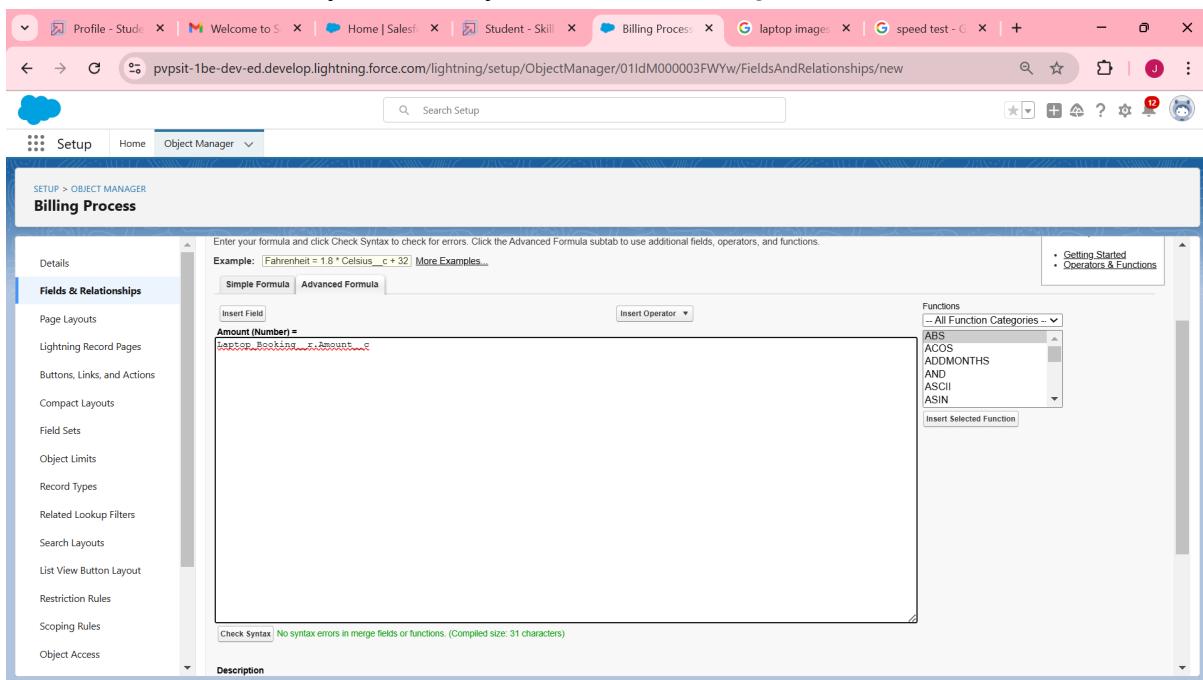
Select required Click on Next >> Next >> Save and new.

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” and click Next.
4. Enter the Field label: Amount, the Field name gets auto generated and click on Next.(Formula return type Number).
5. 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
6. “Laptop_Booking__r.Amount__c”.
7. Click on the Check syntax: No syntax errors in merge fields



Creating the field in Total Laptops 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. Field Label: Laptops Available
5. Field Name : It's gets auto generated
6. Select the Formula Return Type as “Number”
7. Select the Decimal places as “0” and Click on Next .

Validation Rule:

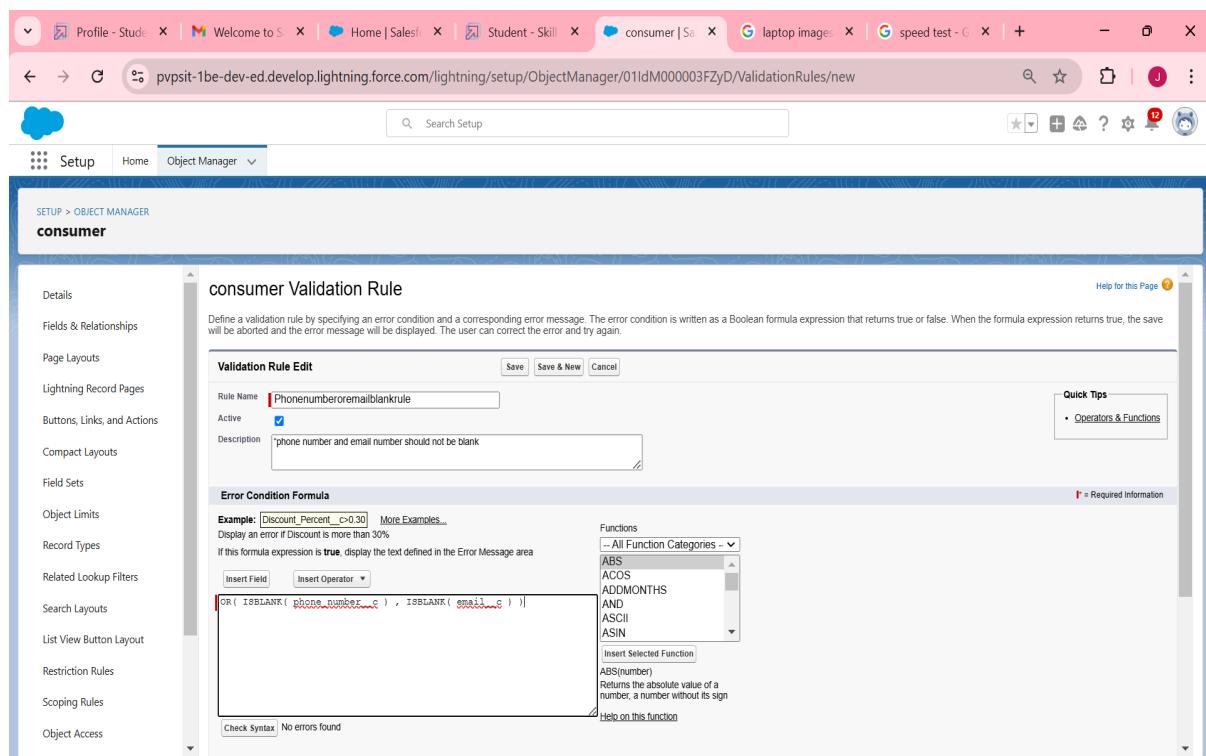
Validation rules are applied when a user tries to save a record and are used to check if the data meets specified criteria. If the criteria are not met, the validation rule triggers an error message and prevents the user from saving the record until the issues are resolved.

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".

Creating the validation rule for phone number and email fields 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.

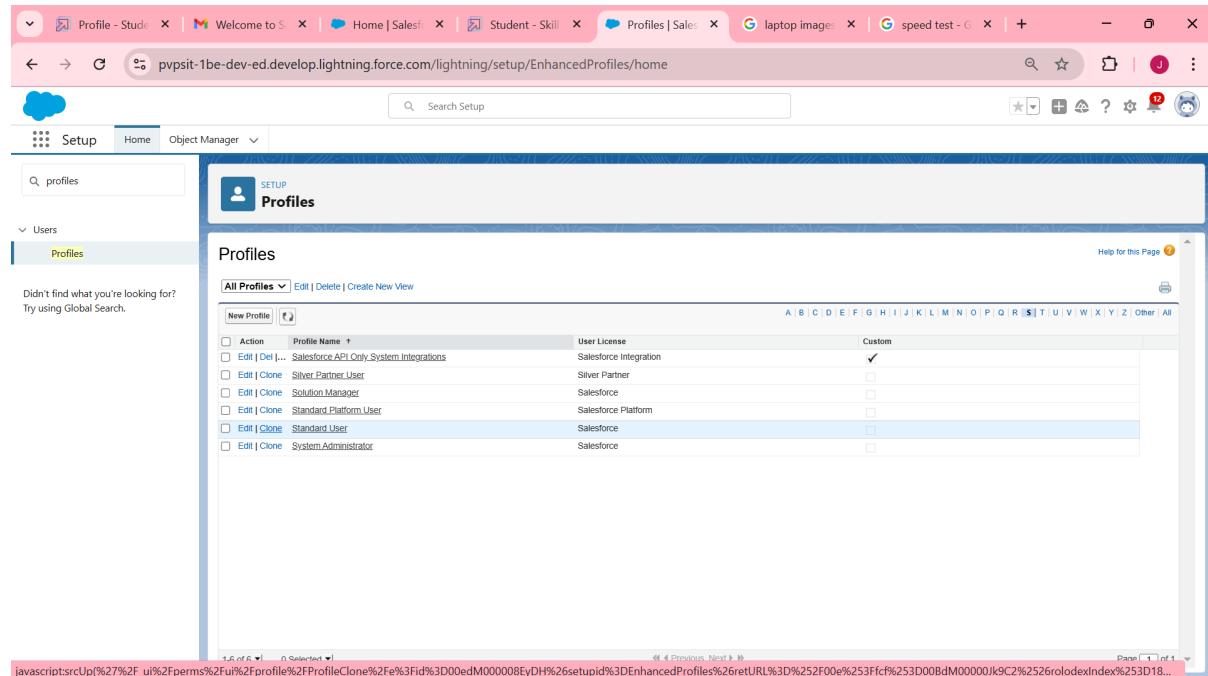
Types of profiles in salesforce

1. **Standard profiles:** By default salesforce provides below standard profiles.

- Contract Manager
- Read Only
- Marketing User
- Solutions Manager
- Standard User
- System Administrator.

We cannot delete standard ones. Each of these standard ones includes a default set of permissions for all of the standard objects available on the platform.

2. **Custom Profiles:** Custom ones defined by us. They can be deleted if there are no users assigned with that particular one.



The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The left sidebar has 'Users' expanded and 'Profiles' selected. The main area displays a table of profiles with columns for Action, Profile Name, User License, and Custom. The 'Custom' column for the 'Standard User' profile has a checked checkbox. Other profiles listed include 'Salesforce API Only System Integrations', 'Silver Partner User', 'Solution Manager', 'Standard Platform User', 'Standard User', and 'System Administrator'. The table has a header row with letters A through Z and a 'All' link. At the bottom, there are navigation links for 'Previous' and 'Next' and a note about JavaScript errors.

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.

SETUP

Profiles

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile	Standard User
User License	Salesforce
Profile Name	<input type="text" value="owner"/>

Save **Cancel**

The screenshot shows the Salesforce Setup - Profiles page. On the left, there's a sidebar with a search bar and a 'Users' section containing a 'Profiles' tab which is selected. The main content area is titled 'Profiles' and contains several sections:

- Custom Object Permissions:** A grid where checkboxes indicate access levels (Read, Create, Edit, Delete, View All, Modify All) for various objects like Ideas, Images, Incidents, Individuals, Inventory Reservations, Work Plans, Work Plan Templates, Work Step Templates, Work Types, and Work Type Groups.
- Session Settings:** Set 'Session Times Out After' to '2 hours of inactivity'.
- Password Policies:** Set 'User passwords expire in' to '90 days', 'Enforce password history' to '3 passwords remembered', and 'Minimum password length' to '8'.

Agent Profile

1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Standard Platform User) >> enter profile name (**Agent**) >> Save.
2. While still on the profile page, then click Edit.
3. Scroll down to Custom Object Permissions and Give access permissions for Total Laptops, consumer , Laptop Bookings and Billing Process objects as mentioned in the below diagram.

SETUP

Profiles

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile	Standard Platform User
User License	Salesforce Platform
Profile Name	<input type="text" value="Agent"/>

Save **Cancel**

SETUP

Profiles

Custom Object Permissions

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Billing Process	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
consumer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Session Settings

Session Times Out After: 2 hours of inactivity

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

Push Topics

Sellers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Streaming Channels	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User External Credentials	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Laptop Bookings

Total Laptops	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
---------------	-------------------------------------	-------------------------------------	-------------------------------------	-------------------------------------	--------------------------	--------------------------

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.

Understanding Roles

Set up your Role Hierarchy to control how your organization reports on and accesses data.

Sample Role Hierarchy

View other sample Role Hierarchies: Territory-based Sample

Help for this Page

Set Up Roles

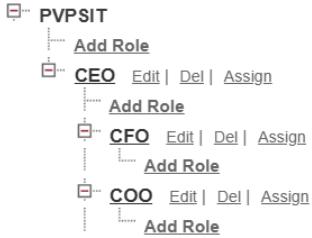
Don't show this page again

Creating the Role Hierarchy

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

Your Organization's Role Hierarchy

[Collapse All](#) [Expand All](#)



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.

Role Edit New Role

Role Edit

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

[Save](#) [Save & New](#) [Cancel](#)

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.
4. Then click on Save.

Role Edit New Role

Role Edit

Label	Agent
Role Name	Agent
This role reports to	owner
Role Name as displayed on reports	

[Save](#) [Save & New](#) [Cancel](#)

Users:

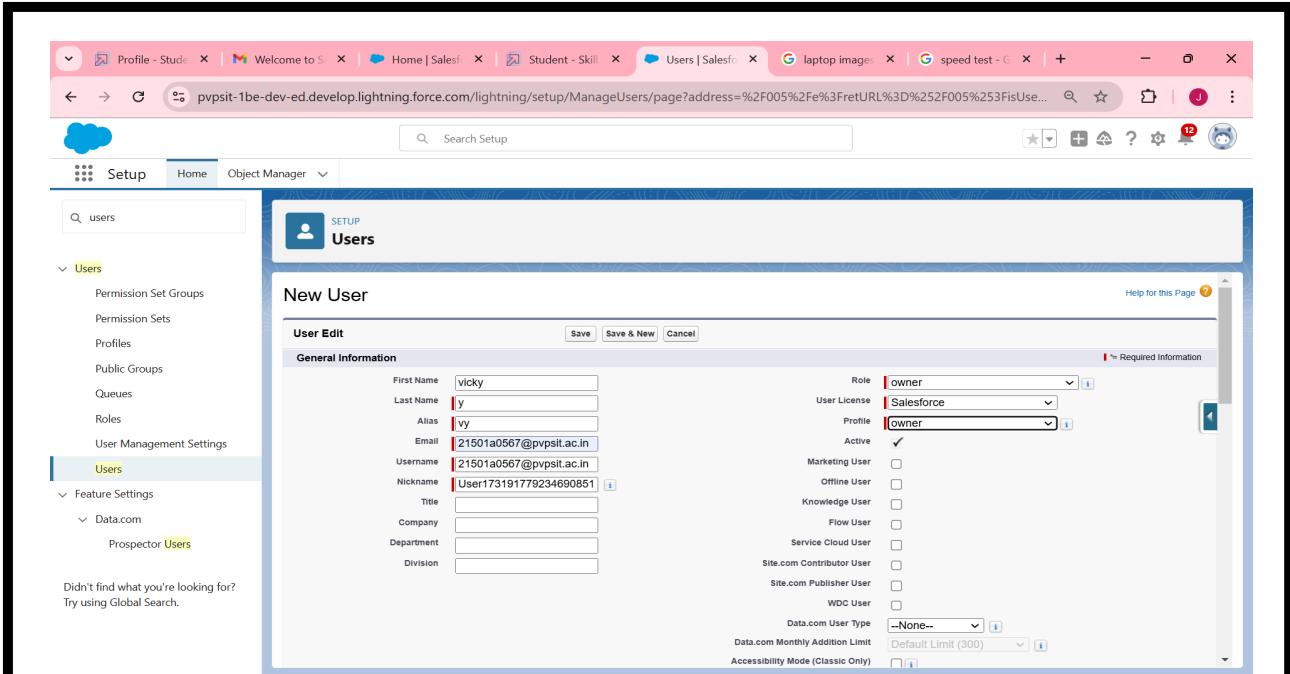
A user is anyone who logs in to Salesforce. Users are employees at your company,

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.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00ddm00000fb05uad.9a5grx8dylg@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	Pavan Kumar Jammu	jPava	pavan12144@pvpst.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	User_Integration	integ	integration@00ddm00000fb05uad.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00ddm00000fb05uad.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

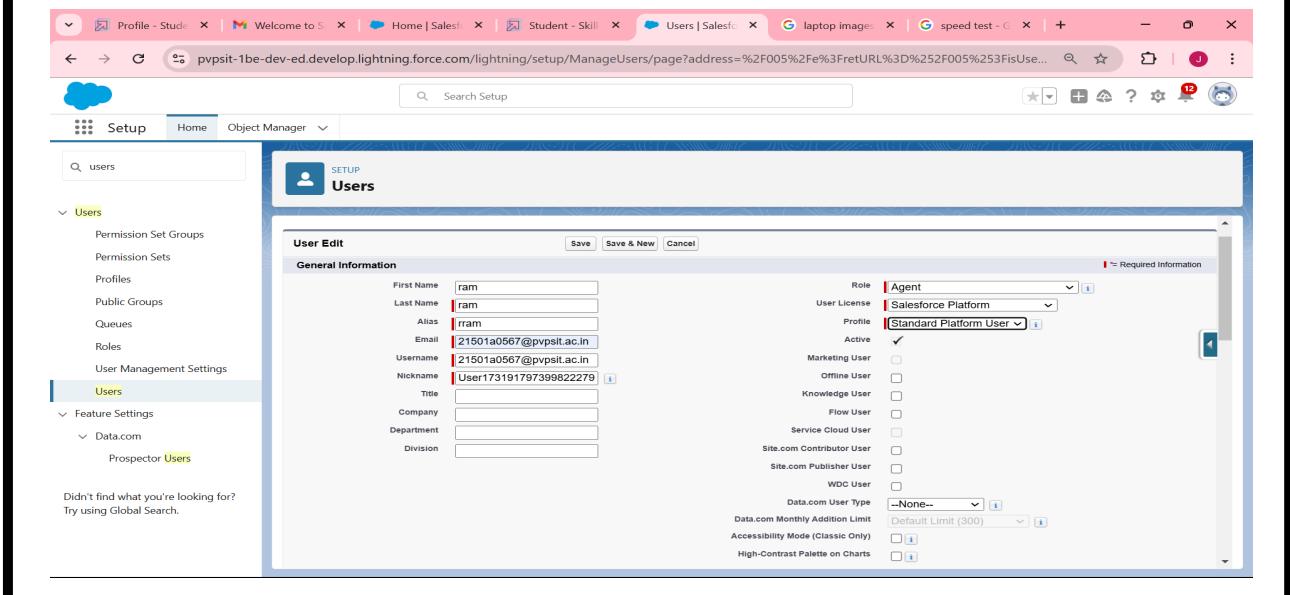
Create User

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. Save it.



Activity 2: creating another users

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



Flows:

In Salesforce, a flow is a powerful tool that allows you to automate business processes, collect and update data, and guide users through a series of screens or steps. Flows are built using a visual interface and can be created without any coding knowledge. In Salesforce, "flows" typically refer to Salesforce Flow, which is a powerful automation tool that allows you to create custom, automated processes in your Salesforce org without writing code. Salesforce Flow is a point-and-click tool that enables you to design and automate complex business processes, collect data, and interact with users in a visual interface.

There are different types of flows in Salesforce, including:

Screen Flows: These are used to guide users through a series of screens to collect or display information. Screen Flows are often used for data entry and updates.

Autolaunched Flows: These are flows that are triggered by events, such as when a record is created or updated. They don't require user interaction and can be used for background automation.

Flow Builder: Flow Builder is the visual interface used to create flows. It allows you to design flows by adding elements, like screens, logic, and actions, using a drag-and-drop approach.

Flow Templates: Salesforce provides a library of pre-built flow templates that you can use as a starting point for your own flows. These templates cover a variety of use cases, from simple to complex.

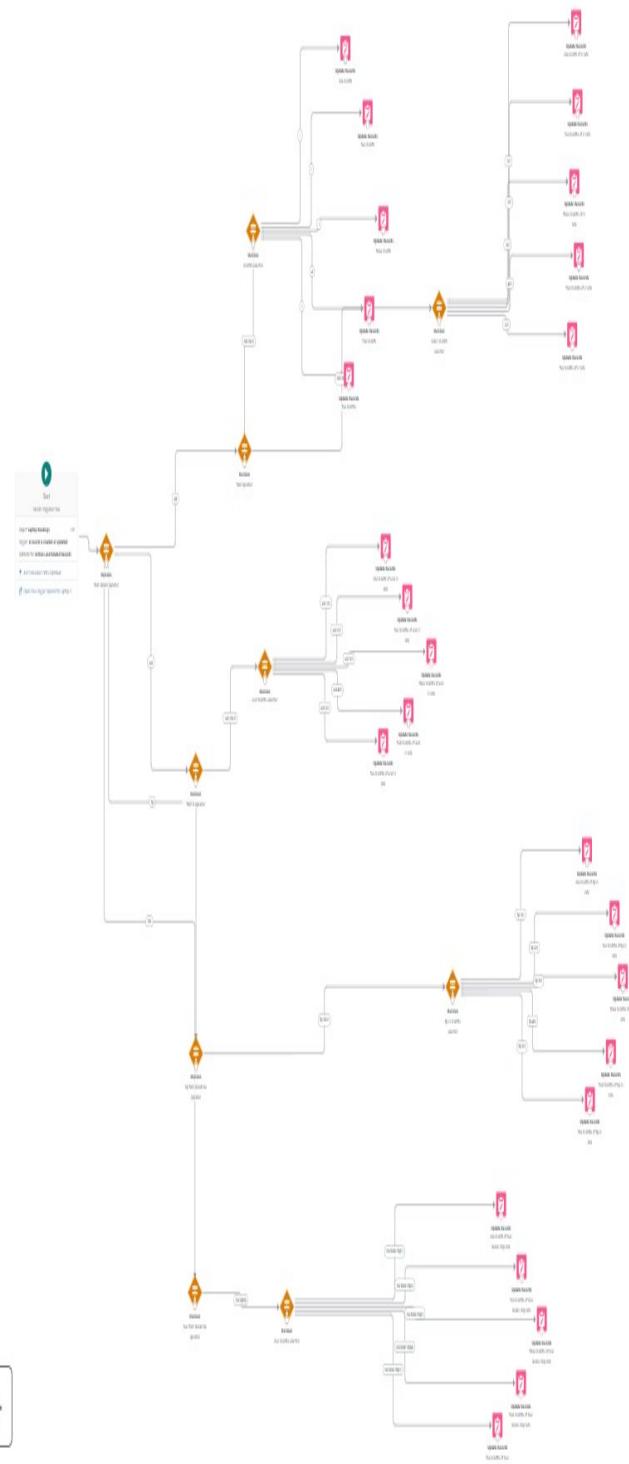
Create a Flow on dell laptop

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

Overall Flow Diagram:



APEX:

Apex Overview

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

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

Creating Classes :

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

- **Class:** As in Java, you can create classes in Apex. A class is a template or blueprint from which objects are created. An object is an instance of a class.
- **Object:** Object is an instance of a class, where it can access all the properties that are present in a class i.e, variables and methods.

Steps to create a class in APEX:

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

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).
```

Handler Class Code:

```
public class LaptopBookingHandler {  
public static void sendEmailNotification (List lapList)
```

```

{
for(Laptop_Bookings__c lap:lapList)
{
    Messaging.SingleEmailMessage email = new Messaging.SingleEmailMessage();
    email.setToAddresses( new List{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{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
2. Summary
3. Matrix
4. Joined Reports

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

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

2. Summary Reports: This type of reports provide a listing of data with groupings and 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. Click apply it.

Edit Bucket Column

* Field * Bucket Name

Range		Bucket	
<input type="button" value="Add ►"/> <= *	<input type="text" value="900"/>	* Bucket Name <input type="text" value="basic"/>	<input type="button" value="X"/>
<input type="button" value="Add ►"/> > 900 to *	<input type="text" value="1500"/>	* Bucket Name <input type="text" value="intermediate"/>	<input type="button" value="X"/>
<input type="button" value="Add ►"/> > 1,500 to *	<input type="text" value="10000"/>	* Bucket Name <input type="text" value="high"/>	<input type="button" value="X"/>
<input type="button" value="Add ►"/> >	<input type="text" value="10,000"/>	* Bucket Name <input type="text" value="very high"/>	<input type="button" value="X"/>

Treat empty Amount values in the report as zeros.

* = Required

Sharing the reports with the owner:

Edit Subscription

Settings

Frequency

Daily Weekly Monthly

Time

8:00 am ▾

Attachment

Attach File

Recipients

⚠ Recipients see the same report data as the person running the report.
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

 Jammu Pavan Kumar

Conditions

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

Add conditions to this report

Cancel Save

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.

The image consists of two vertically stacked screenshots of an Oracle APEX application's interface.

The top screenshot shows a modal dialog titled "Add Items". It has a sidebar on the left labeled "Available Items" with sections for "Favorites" and "All" (which contains 1 item). On the right, there is a search bar with the placeholder "dash" and a dropdown menu showing "Dashboards X" with "1 item selected". Below the search bar is a list with a checked checkbox next to "Dashboards".

The bottom screenshot shows a modal dialog titled "Edit LAPTOP RENTALS App Navigation Items". It includes a message: "Personalize your nav bar for this app. Reorder items, and rename or remove items you've added." with a "Learn More" link. A message at the top says "1 item added to your list. Save your updates." Below this, there is a section titled "NAVIGATION ITEMS (5)" containing five items: "Total Laptops", "consumer", "Laptop Bookings", "Billing Process", and "Dashboards", which is highlighted with a yellow background. There is also a "Reset Navigation to Default" link. At the bottom right are "Cancel" and "Save" buttons.

Create a Dashboard Folder:

1. Click on the app launcher and search for the dashboard.
2. Click on the dashboard tab.
3. Click the new folder, give the folder label as "**total rent amount**".
4. Folder unique names will be auto populated.
5. Click save.

Create folder

* Folder Label

* Folder Unique Name

[Cancel](#) [Save](#)

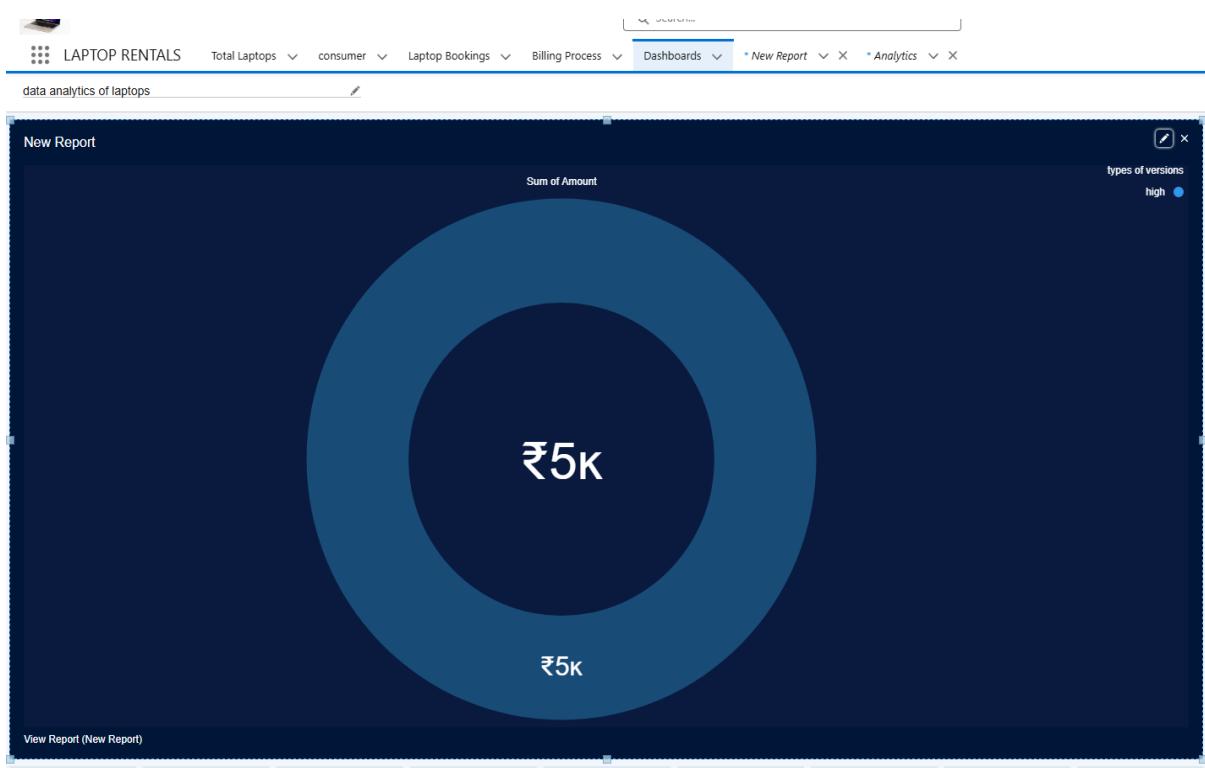
New Dashboard

* Name

Description

Folder
 [Select Folder](#)

[Cancel](#) [Create](#)



Conclusion:

This Salesforce-based CRM application for laptop rentals delivers a comprehensive solution tailored to streamline operations and enhance customer experience. By utilizing **custom object management**, the system efficiently tracks laptops, bookings, and customer details, ensuring seamless data organization. **Automation through Apex triggers** minimizes manual effort, improving accuracy and operational efficiency with features like automated rental status updates and real-time notifications.

The integration of **customized reporting tools** enables in-depth analysis of booking trends and financial performance, offering actionable insights to support data-driven decision-making. These features collectively ensure the system is scalable and adaptable to future business needs.

In conclusion, the project enhances operational efficiency, fosters better communication, and supports strategic planning, ultimately contributing to improved customer satisfaction and business growth.