

# **A CRM APPLICATION FOR LAPTOP RENTALS**



**By**

**Likitha Sai Conjeevaram**  
**21831a0430@gniindia.org**

# Project Abstract

The CRM application for laptop rentals focuses on delivering rental items to customers. It harnesses the capabilities of customer relationship management (CRM) to enhance customer experiences, streamline store operations, and boost overall efficiency. Furthermore, effective CRM practices include communicating with potential customers through email, ensuring that we engage with those identified as prospects.

The key features of the CRM application for laptop rentals are given below:

## 1. User-Friendly Interface

Easy navigation for customers to browse and rent laptops.

## 2. Automated Operations

Streamlines inventory management and order processing to reduce manual errors.

## 3. Data Analytics

Collects and analyzes customer data to optimize marketing strategies and inventory.

## 4. Targeted Email Communication

Engages potential customers with personalized email campaigns to nurture leads.

## 5. Customer Support

Provides easy access to assistance and feedback channels for improved service.

## 6. Performance Tracking

Monitors rental trends and customer satisfaction to enhance service offerings.

## Table of Contents

INTRODUCTION.....	4
SALESFORCE.....	5

TASK 1: CREATING DEVELOPER ACCOUNT .....	6
TASK 2: ACCOUNT ACTIVATION .....	7
<b>OBJECT CREATION .....</b>	<b>9</b>
TASK 3: CREATE TOTAL LAPTOPS OBJECT .....	10
TASK 4: CREATE CONSUMER OBJECT .....	11
TASK 5: CREATE LAPTOP BOOKINGS OBJECT .....	12
TASK 6: CREATE BILLING PROCESS OBJECT .....	13
TASK 7: CREATING A CUSTOM TAB .....	14
<b>THE LIGHTNING APP .....</b>	<b>16</b>
TASK 8: CREATE A LIGHTNING APP .....	16
<b>FIELDS .....</b>	<b>19</b>
TASK 9: CREATING THE FIELD IN CONSUMER OBJECT .....	19
TASK 10: CREATING THE FIELD IN LAPTOPS BOOKINGS OBJECT .....	22
TASK 11: TO CREATE A FIELDS & RELATIONSHIP TO AN LAPTOP BOOKING OBJECT .....	24
TASK 12: TO CREATE A FIELDS & RELATIONSHIP TO AN LAPTOP BOOKING OBJECT .....	24
TASK 13: CREATION OF FIELDS & RELATIONSHIP FOR BILLING PROCESS OBJECT .....	30
TASK 14: CREATING THE FIELD IN TOTAL LAPTOPS OBJECT .....	33
<b>VALIDATION RULE .....</b>	<b>34</b>
TASK 15: CREATING THE VALIDATION RULE FOR PHONE NUMBER FIELD IN CONSUMER OBJECT .....	35
<b>PROFILES .....</b>	<b>37</b>
TASK 16: OWNER PROFILE .....	37
TASK 17: AGENT PROFILE .....	38
<b>ROLES AND HIERARCHY .....</b>	<b>40</b>
TASK 18: CREATING OWNER ROLE .....	40
TASK 19: CREATING AGENT ROLES .....	41
<b>USERS .....</b>	<b>41</b>
TASK 20: CREATE USER .....	42
<b>FLOWS .....</b>	<b>44</b>
TASK 21: CREATE A FLOW ON DELL LAPTOP .....	45
TASK 22: CREATING FLOW ON ACER LAPTOP .....	51
TASK 23: CREATING A FLOW ON HP LAPTOP .....	54
TASK 24: CREATING A FLOW ON MAC LAPTOP .....	57
<b>APEX .....</b>	<b>61</b>
TASK 25: CREATE AN APEX CLASS .....	63
TASK 26: CREATE AN APEX TRIGGER .....	64
<b>REPORTS .....</b>	<b>66</b>
TASK 27: CREATE REPORT .....	66
TASK 28: SHARING REPORT TO OWNER .....	69
<b>DASHBOARDS .....</b>	<b>71</b>
TASK 29: CREATE DASHBOARD FOLDER .....	71

## Introduction

In the rapidly evolving world of technology, the demand for laptops has never been higher. Laptop rentals have emerged as a convenient and cost-effective solution for individuals and businesses seeking temporary access to powerful computing devices. To effectively manage this growing market, a robust Customer Relationship Management (CRM) application is essential. The CRM application for laptop rentals serves as a comprehensive platform that streamlines the rental process, enhances customer engagement, and optimizes business operations.

### Revolutionizing the Laptop Rental Industry

The introduction of this CRM application revolutionizes the laptop rental industry by providing a centralized system that caters to the needs of both renters and rental providers. By integrating key CRM principles, such as customer data management, targeted communication, and performance tracking, the application ensures a seamless and efficient rental experience.

### Simplifying the Rental Process for Customers

One of the primary objectives of the CRM application is to simplify the rental process for customers. Through an intuitive user interface, renters can easily:

- Browse available laptops
- Compare specifications
- Manage their bookings with ease

This convenience not only attracts new customers but also fosters loyalty among existing ones, leading to increased rental volumes and revenue.

### Empowering Rental Providers with Efficient Tools

Moreover, the CRM application empowers rental providers with powerful tools to manage their operations effectively. Automated inventory management, order processing, and payment tracking reduce manual errors and save valuable time. This efficiency allows rental providers to focus on delivering exceptional customer service and expanding their business.

### Data-Driven Insights for Informed Decisions

By incorporating data-driven insights, the CRM application enables rental providers to make informed decisions based on customer preferences, rental trends, and market demands. This data-driven approach helps optimize inventory levels, tailor marketing strategies, and identify new revenue streams, ultimately driving growth and profitability in the laptop rental industry.

## A New Standard for Excellence in Laptop Rentals

The introduction of the CRM application for laptop rentals marks a significant milestone in the evolution of the rental industry. By combining cutting-edge technology with customer-centric principles, this application sets a new standard for excellence in laptop rentals, paving the way for a more efficient, engaging, and profitable future.

## Salesforce

Salesforce is a dynamic customer success platform that equips businesses with the tools necessary to excel in sales, service, marketing, analytics, and customer engagement. By providing a centralized solution for managing customer relationships, Salesforce enables organizations to navigate the entire customer journey effectively, from initial outreach to ongoing support. This capability allows for the delivery of personalized experiences that foster loyalty and satisfaction.

The platform is built on a secure cloud infrastructure, ensuring that your data is accessible from anywhere, while also offering the flexibility and scalability required to accommodate business growth.

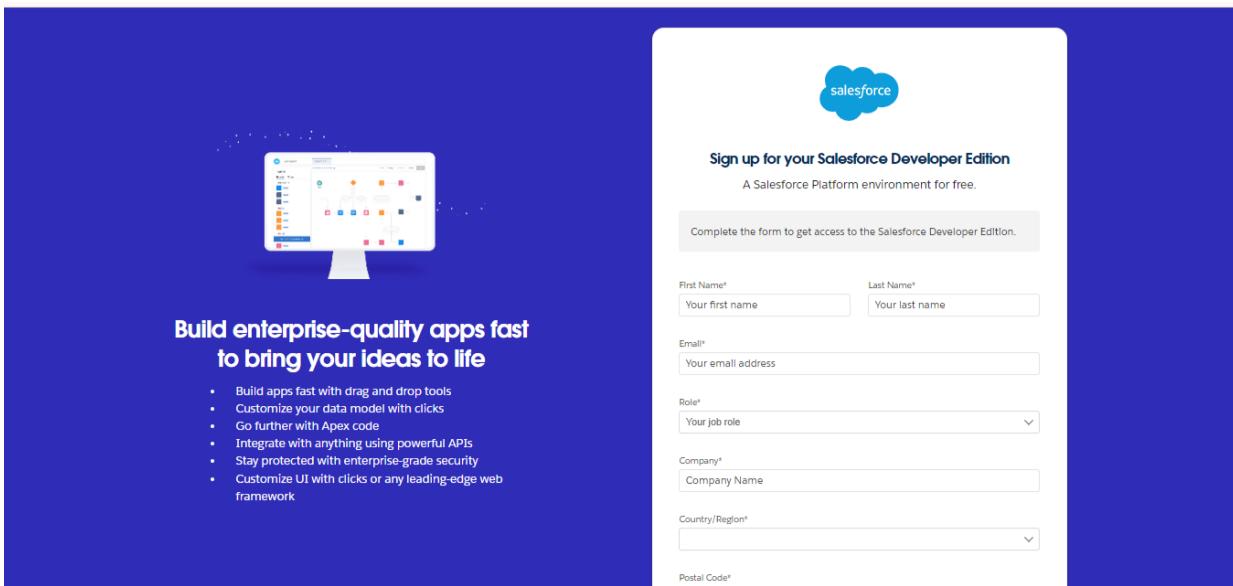
and changing needs. Salesforce's extensive range of customizable tools allows organizations to tailor the platform to their unique requirements, enhancing operational efficiency and effectiveness. Additionally, Salesforce boasts a rich ecosystem of applications available through the Salesforce AppExchange, enabling businesses to integrate various functionalities and expand their capabilities seamlessly. This integration fosters collaboration among employees and partners, streamlining workflows and improving communication.

By harnessing the power of data analytics, Salesforce provides valuable insights that inform strategic decision-making, helping businesses identify trends, optimize processes, and enhance customer interactions. Ultimately, Salesforce empowers organizations to thrive in a competitive landscape, build lasting relationships with customers, and achieve their strategic objectives, positioning them for long-term success in an ever-evolving market.

## Task 1: Creating Developer Account

Creating a developer org in salesforce.

1. Go to <https://developer.salesforce.com/signup>
2. On the sign up form, enter the following details :
  - First name & Last name
  - Email
  - Role : Developer
  - Company : College Name
  - County : India
  - Postal Code : pin code
  - Username : should be a combination of your name and company



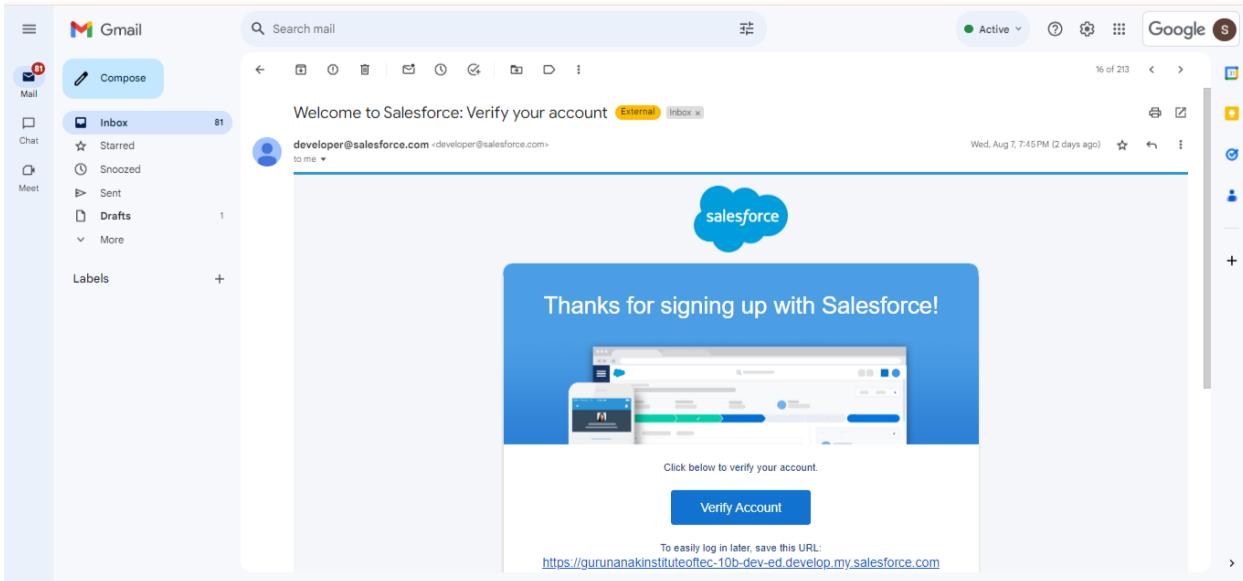
This need not be an actual email id, you can give anything in the format :

username@organization.com

Click on sign me up after filling these.

## Task 2: Account Activation

1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.



2. Click on Verify Account.

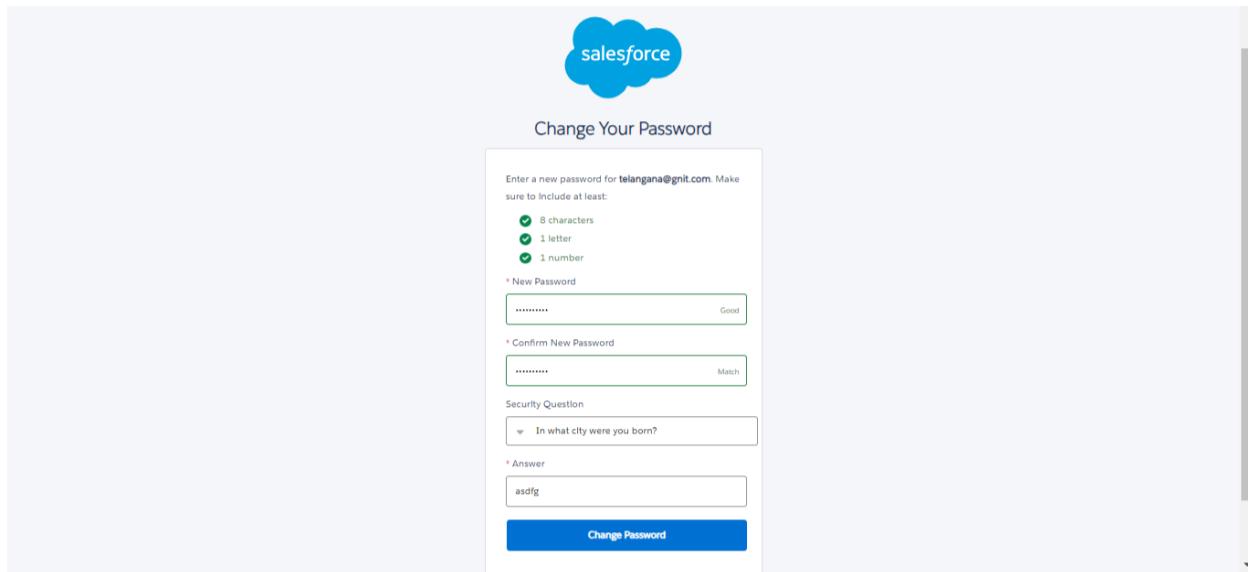
3. Give a password and answer a security question and click on change password.

Make sure to remember the password.

In case you forget the password, you can simply click on 'Forgot password' option to create

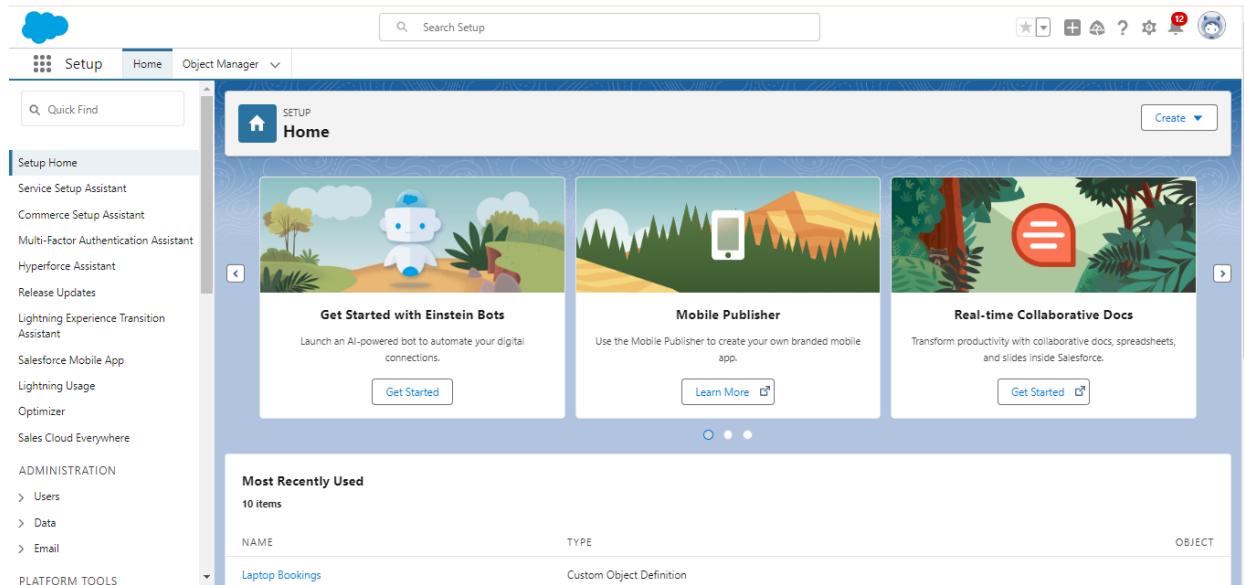
a new password.

An email with the subject “Finish resetting your Salesforce password” will be sent for this process.



The screenshot shows the Salesforce login screen with the blue cloud logo at the top. Below it, the text "Change Your Password" is displayed. A message box prompts the user to enter a new password, specifying requirements: 8 characters, 1 letter, and 1 number. It also asks for a security question and answer. Two input fields for "New Password" and "Confirm New Password" are shown, both containing placeholder text. A dropdown menu for a security question is open, showing "In what city were you born?". The "Answer" field contains "asdfg". At the bottom is a large blue "Change Password" button.

4. Then you will redirect to your salesforce setup page.



The screenshot shows the Salesforce Setup Home page. The top navigation bar includes icons for Cloud, Setup, Home, and Object Manager, with "Setup" currently selected. A search bar labeled "Search Setup" is present. The main content area features a "SETUP Home" section with three cards: "Get Started with Einstein Bots" (with a "Get Started" button), "Mobile Publisher" (with a "Learn More" button), and "Real-time Collaborative Docs" (with a "Get Started" button). Below this is a "Most Recently Used" section showing a list of 10 items, with "Laptop Bookings" listed as a Custom Object Definition. The left sidebar contains navigation links for 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), and Platform Tools.

# Object Creation

## What Is an Object?

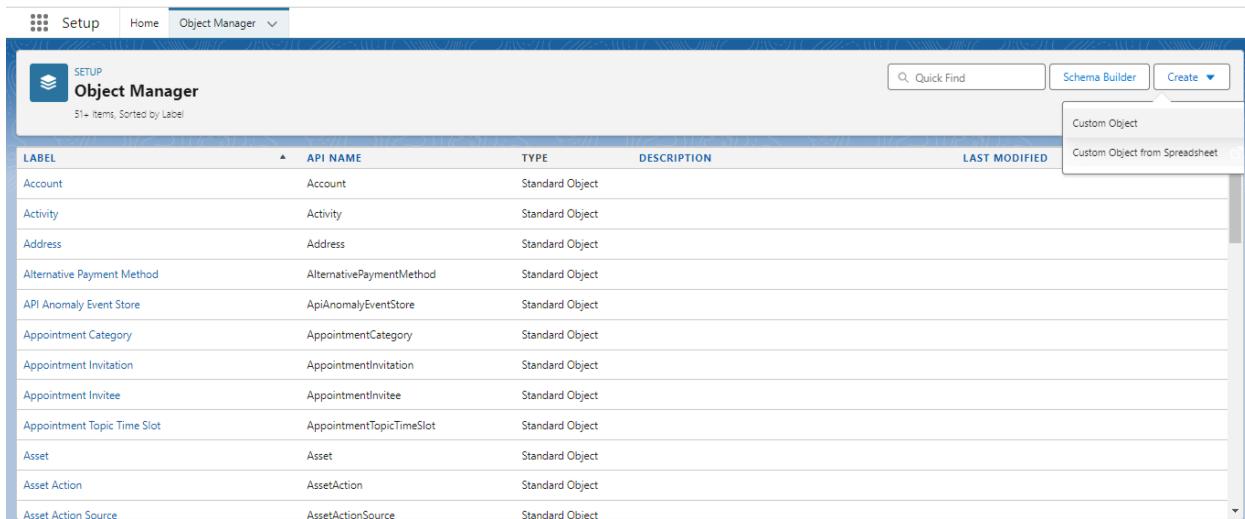
Salesforce objects are database tables that permit you to store data that is specific to an organization. What are the types of Salesforce objects

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.

## To create an object:

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



The screenshot shows the Salesforce Object Manager page. At the top, there are navigation links: Setup, Home, and Object Manager. Below the header, there's a search bar labeled "Quick Find" and buttons for "Schema Builder" and "Create". A dropdown menu under "Create" shows options: "Custom Object" (which is selected) and "Custom Object from Spreadsheet". The main area is a table titled "Object Manager" with 514 items, sorted by Label. The columns are: LABEL, API NAME, TYPE, DESCRIPTION, and LAST MODIFIED. The table lists various standard objects like Account, Activity, Address, etc. The "Custom Object" option is highlighted in the dropdown menu.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED
Account	Account	Standard Object		
Activity	Activity	Standard Object		
Address	Address	Standard Object		
Alternative Payment Method	AlternativePaymentMethod	Standard Object		
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object		
Appointment Category	AppointmentCategory	Standard Object		
Appointment Invitation	AppointmentInvitation	Standard Object		
Appointment Invitee	AppointmentInvitee	Standard Object		
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object		
Asset	Asset	Standard Object		
Asset Action	AssetAction	Standard Object		
Asset Action Source	AssetActionSource	Standard Object		

2. On Custom object defining page:
3. Enter the label name, plural label name, click on Allow reports, Allow search.

New Custom Object

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:

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name:  Example: Account Name

SETUP New Custom Object

Data Type:  Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.

Optional Features

- Allow Reports
- Allow Activities
- Track Field History
- Allow in Chatter Groups
- Enable Licensing

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#).

- Allow All API Access
- Allow Bulk API Access
- Allow Streaming API Access

Deployment Status

- In Development
- Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more](#).

- Allow Search

Object Creation Options (Available only when custom object is first created)

- Add Notes and Attachments related list to default page layout
- Launch New Custom Tab Wizard after saving this custom object

4. Click on Save.

## Task 3: 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 'New Custom Object' page in the Salesforce Setup interface. The 'Custom Object Definition Edit' section contains the following information:

- Custom Object Information:** 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:** A large empty text area.
- Context-sensitive Help Setting:** Open the standard Salesforce.com Help & Training window (radio button selected) or Open a window using a Visualforce page.
- Content Name:**

At the bottom, there's a note about Record Name and a 'Save' button.

## Task 4: 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.

**New Custom Object**

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:

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name:  Example: Account Name

## Task 5: 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.

**New Custom Object**

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:

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name:  Example: Account Name

## Task 6: Create Billing Process Object

1. 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 'New Custom Object' setup page in Salesforce. The 'Label' field contains 'Billing Process'. The 'Plural Label' field also contains 'Billing Process'. The 'Object Name' field contains 'Billing Process'. The 'Record Name' field also contains 'Billing Process'. There are checkboxes for 'Open the standard Salesforce.com Help & Training window' and 'Open a window using a Visualforce page', both of which are checked. The 'Content Name' dropdown is set to 'None'. A note at the bottom states: 'The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.'

## Tabs

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

### **Types of Tabs:**

#### **1. 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.

#### **2. 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.

#### **1. 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.

#### **2. Lightning Component Tabs**

Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app.

#### **3. 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.

## **Task 7: Creating A Custom Tab**

### **To create a Tab:**

1. Go to setup page >> Type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)

The screenshot shows the Salesforce Setup interface under the 'User Interface' section, specifically the 'Tabs' configuration. A search bar at the top left contains 'Q\_ tabs'. The sidebar on the left has a tree view with 'User Interface' expanded, showing 'Rename Tabs and Labels' and 'Tabs' (which is selected). A note below says 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'New Custom Object Tab' and 'Step 1. Enter the Details'. It includes fields for 'Object' (set to 'None'), 'Tab Style' (set to 'None'), and a 'Description' text area.

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 above.

The final output will be shown as following:

The screenshot shows the Salesforce Setup interface under the 'User Interface' section, specifically the 'Custom Tabs' configuration. The sidebar shows 'Setup', 'Home', and 'Object Manager'. The 'Tabs' tab is selected. The main content area is titled 'Custom Tabs' and contains a table of custom object tabs. The table has columns for 'Action', 'Label', 'Tab style', and 'Description'. Below the table are sections for 'Web Tabs', 'Visualforce Tabs', and 'Lightning Component Tabs', each with a note indicating no tabs have been defined.

Action	Label	Tab style	Description
Edit   Del	Billing Process	Computer	
Edit   Del	consumer	People	
Edit   Del	Laptop Bookings	Books	
Edit   Del	Total Laptops	Laptop	

# The Lightning App

In the context of Lightning Experience, a Lightning app is a powerful tool that brings together a collection of related items, such as objects, tabs, and other components, to serve a specific function or purpose. These apps are designed to provide users with a convenient and streamlined way to access the necessary tools and information they need to perform their tasks effectively. By bundling these items into a single Lightning app, users can easily navigate between them using the navigation bar, improving their overall productivity and efficiency.

One of the key advantages of Lightning apps is the ability to customize them with a unique color scheme and logo, allowing organizations to reinforce their brand identity and create a cohesive user experience. Additionally, Lightning apps can include a utility bar, which provides users with quick access to frequently used tools and features, further enhancing their workflow and productivity.

Another notable feature of Lightning apps is the inclusion of Lightning page tabs, which enable users to switch between different pages or views within the app seamlessly. This functionality allows members of your organization to work more efficiently by easily transitioning between various aspects of their work, such as sales, service, or marketing, without the need to navigate through multiple applications or interfaces.

By leveraging the power of Lightning apps, organizations can empower their employees to work more effectively and efficiently, ultimately driving better business outcomes. The ability to customize and tailor these apps to specific organizational needs, while providing a consistent and intuitive user experience, makes Lightning apps a valuable asset in the Lightning Experience ecosystem.

## Task 8: Create A Lightning App

To create a lightning app page:

1. Go to setup page >> search “app manager” in quick find >> select “app manager” >> click on New lightning App.

Lightning Experience App Manager						
App Name		Developer Name	Description	Last Modified Date	App Type	Visible i...
23 items • Sorted by App Name • Filtered by All appmenuitems - TabSetType						
1	All Tabs	AllTabSet	Build CRM Analytics dashboards and apps	07/08/2024, 7:26 pm	Classic	<input checked="" type="checkbox"/>
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	07/08/2024, 7:26 pm	Classic	<input checked="" type="checkbox"/>
3	App Launcher	AppLauncher	App Launcher tabs	07/08/2024, 7:26 pm	Classic	<input checked="" type="checkbox"/>
4	Automation	FlowApp	Automate business processes and repetitive tasks.	07/08/2024, 7:29 pm	Lightning	<input checked="" type="checkbox"/>
5	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	07/08/2024, 7:28 pm	Lightning	<input checked="" type="checkbox"/>
6	Community	Community	Salesforce CRM Communities	07/08/2024, 7:26 pm	Classic	<input checked="" type="checkbox"/>
7	Content	Content	Salesforce CRM Content	07/08/2024, 7:26 pm	Classic	<input checked="" type="checkbox"/>
8	Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	07/08/2024, 7:26 pm	Lightning	<input checked="" type="checkbox"/>
9	Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	07/08/2024, 7:26 pm	Lightning	<input checked="" type="checkbox"/>
10	LAPTOP RENTALS	Likitha	08/08/2024, 1:28 am	Lightning	<input checked="" type="checkbox"/>	
11	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	07/08/2024, 7:26 pm	Lightning	<input checked="" type="checkbox"/>
12	Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	07/08/2024, 7:26 pm	Classic	<input checked="" type="checkbox"/>
13	Platform	Platform	The fundamental Lightning Platform	07/08/2024, 7:26 pm	Classic	<input checked="" type="checkbox"/>
14	Queue Management	QueueManagement	Create and manage queues for your business.	07/08/2024, 7:26 pm	Lightning	<input checked="" type="checkbox"/>
15	Sales	Sales	The world's most popular sales force automation (SFA) solution	07/08/2024, 7:26 pm	Classic	<input checked="" type="checkbox"/>
16	Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more.	07/08/2024, 7:26 pm	Lightning	<input checked="" type="checkbox"/>

2. Fill the app name in app details as LAPTOP RENTALS >>Next >> (App option page) keep it as default >> Next >> (Utility Items) keep it as default >> Next.

New Lightning App

App Details & Branding

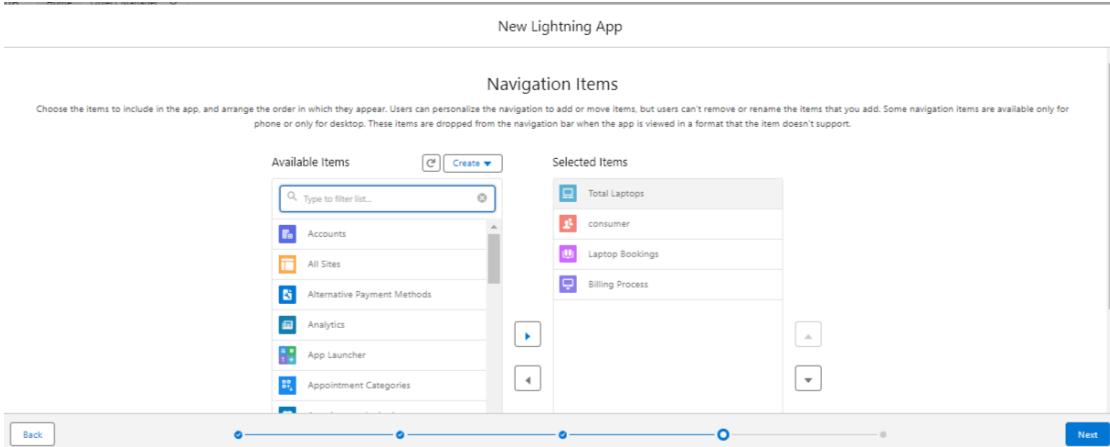
Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

<b>App Details</b>	<b>App Branding</b>
*App Name <input type="text" value="LAPTOP RENTALS"/> *Developer Name <input type="text" value="LAPTOP RENTALS"/> Description <input type="text" value="Enter a description..."/>	Image <input type="file"/> Primary Color Hex Value <input type="text" value="#0070D2"/> <input type="button" value="Clear"/> Org Theme Options <input type="checkbox"/> Use the app's image and color instead of the org's custom theme

App Launcher Details

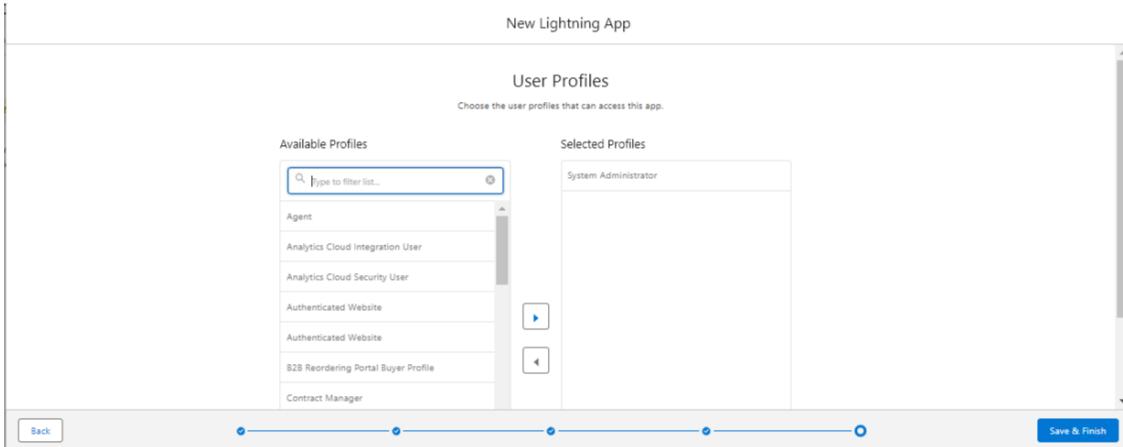
Next

3. Upload a photo that is related to your app.  
 4. To Add Navigation Items:



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

##### 5. To Add User Profiles:



Search profiles (System administrator) in the search bar >> click on the arrow button >> save & finish.

# Fields

In the context of Salesforce, fields serve as the fundamental building blocks for storing data within objects, which are akin to tables in a relational database. These fields can hold a wide range of valuable information tailored to the specific requirements of each object, making the processes of searching, deleting, and editing records more efficient and user-friendly.

There are two main types of fields in Salesforce:

## Standard Fields

Standard fields are pre-defined by Salesforce and serve specific purposes. It's important to note that while users can freely delete non-required standard fields, they cannot delete required standard fields. Some standard fields that are commonly found across Salesforce applications include:

- Created By: Identifies the user who created the record
- Owner: Specifies the user or queue responsible for the record
- Last Modified: Indicates the user who last modified the record
- Fields created during object creation

## Custom Fields

Custom fields offer a high degree of flexibility, allowing users to modify them according to their unique requirements. Organizations can create custom fields as needed, and they are not always required to be included in records, unlike standard fields. The decision to include or exclude custom fields is at the discretion of the user, providing a level of customization that caters to specific business needs.

By leveraging both standard and custom fields, Salesforce users can effectively manage and organize their data, streamlining processes and enhancing overall efficiency within their Salesforce applications.

## Task 9: 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.



The screenshot shows the Salesforce Object Manager. At the top, there is a search bar with 'consumer' typed into it, a 'Schema Builder' button, and a 'Create' button. Below the header, a table displays one item: 'consumer'. The table has columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The 'consumer' row has values: consumer, consumer\_c, Custom Object, null, 08/08/2024, and a dropdown arrow. The table is titled 'Object Manager' and has a note '1 items. Sorted by Label'.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
consumer	consumer_c	Custom Object		08/08/2024	▼

2. Now click on "Fields & Relationships" >> New
3. Select Data Type as a "Phone"
4. 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.

Setup > Object Manager > consumer

### New Custom Field

Step 2. Enter the details

Field Label: Phone number

Field Name: Phone\_number

Description:

Help Text:

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

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

Default Value: Show Formula Editor

Use formula syntax: Enclose text and picklist value API names in double quotes ("Phone", "Text"), include numbers without quotes (123), show percentages as decimals (.10), and express date calculations in the standard format: (ThisYear)+7. To reference a field from a Custom Metadata type record use: \$CustomMetadataType\_\_r.mtRecordAPIName.Field\_\_c

Step 2 of 4

Previous | Next | Cancel

### 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.

Setup > Object Manager > consumer

### New Custom Field

Step 2. Enter the details

Field Label: Email

Field Name: Email

Description:

Help Text:

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

Unique:  Do not allow duplicate values

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

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

Default Value: Show Formula Editor

Use formula syntax: Enclose text and picklist value API names in double quotes ("Phone", "Text"), include numbers without quotes (123), show percentages as decimals (.10), and express date calculations in the standard format: (ThisYear)+7. To reference a field from a Custom Metadata type record use: \$CustomMetadataType\_\_r.mtRecordAPIName.Field\_\_c

Step 2 of 4

Previous | Next | Cancel

## 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.

The screenshot shows the 'New Custom Field' configuration page in the Salesforce Object Manager. The object selected is 'consumer'. The page title is 'New Custom Field' and it is 'Step 2 of 4'. The left sidebar lists various configuration options like Details, Fields & Relationships, Page Layouts, etc. The main form has the following fields filled:

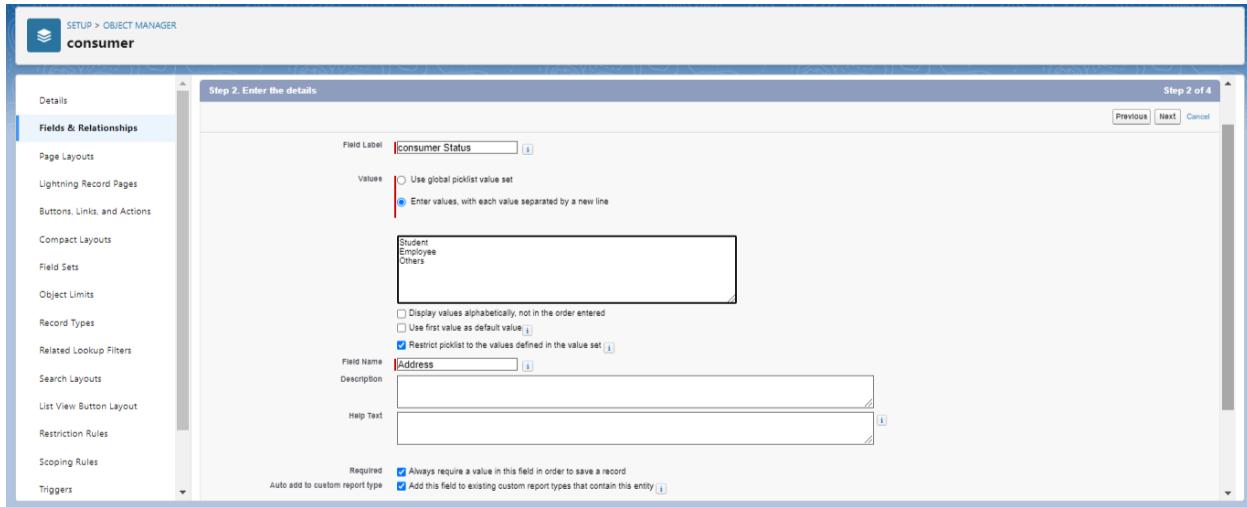
- Field Label: Address
- Field Name: Address
- Description: (empty)
- Help Text: (empty)
- Required:  Always require a value in this field in order to save a record
- Auto add to custom report type:  Add this field to existing custom report types that contain this entity
- Default Value: Show Formula Editor (with a note about formula syntax)

Buttons at the bottom include Previous, Next, and Cancel.

## 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.



## Task 10: 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

Laptop Bookings  
New Custom Field

**Step 2. Enter the details**

Field Label: **laptop names**

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

dell  
acer  
hp  
mac

Display values alphabetically, not in the order entered  
 Use first value as default value  
 Restrict picklist to the values defined in the value set

Field Name: **laptop\_names**

Description:

Help Text:

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

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

To create fields & relationship to an object:

1. Go to setup >> click on Object Manager >> type object name(Laptop Booking) in the search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data Type as a “Picklist”
4. Picklist values are:-1.core i3 2. Core i5 3. Core i7 4.Bionic chip.

Laptop Bookings  
New Custom Field

**Step 2. Enter the details**

Field Label: **core type**

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

core i3  
core i5  
core i7  
bionic chip

Display values alphabetically, not in the order entered  
 Use first value as default value  
 Restrict picklist to the values defined in the value set

Field Name: **laptop\_names**

Description:

Help Text:

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

## Field Dependency:

A field dependency refers to a relationship between two fields on an object where the values of one field determine the available values for another field. Field dependencies are commonly used to create picklist field relationships, where the available options in a dependent picklist are determined by the value selected in a controlling picklist.

Need to use Field Dependency:

By using the field dependency we can get the different Values by selecting the different Picklist.

## Task 11: 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

The screenshot shows the Salesforce Object Manager interface for creating a new object named "Laptop Bookings". The "Fields & Relationships" tab is selected. In the "Instructions" section, there are instructions for managing field dependencies, including a legend for "Excluded Value" (gray) and "Included Value" (yellow). The main table displays a field dependency configuration:

Laptop names:	Dell	Acer	Hp	Mac
core type:	core i3 core i5 core i7	core i3 core i5 core i7	core i3 core i5 core i7	core i3 core i5 core i7 Bionic chip

Buttons at the bottom of the table include "Showing Columns: 1 - 4 (of 4) < Previous | Next > View All Go to" and "Showing Columns: 1 - 4 (of 4) < Previous | Next > View All".

Click save.

## Task 12: To Create A Fields & Relationship To An Laptop Booking Object

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

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

search bar >> click on the object.

2. Now click on “Fields & Relationships” >> New
3. Select Data Type as a “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.

Laptop Bookings  
New Relationship

Step 3. Enter the label and name for the lookup field

Field Label: Name

Field Name: Name

Description:

Help Text:

Child Relationship Name: Laptop\_Bookings

Required:  Always require a value in this field in order to save a record.  
 Clear the value of this field. You can't choose this option if you make this field required.  
 Don't allow deletion of the lookup record that's part of a lookup relationship.

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

Lookup Filter: Optionally, create a filter to limit the records available to users in the lookup field. [Tell me more!](#)

## 2. To create fields in an object:

- 1.Go to setup >> click on Object Manager >> type object name(Laptop Booking) in the 2.search bar >> click on the object.
  - 3.Now click on “Fields & Relationships” >> New
  - 4.Select Data Type as a “Currency”
  - 5.Click on Next
- Fill the Above as following:
- Field Label: Amount
  - Length: (18,0)
  - Field Name :It's gets auto generated
  - Click on Next >> Next >> Save and new

Laptop Bookings  
New Custom Field

**Step 2. Enter the details**

Field Label: Amount

Length: 18  
Number of digits to the left of the decimal point

Decimal Places: 0  
Number of digits to the right of the decimal point

Field Name: Amount

Description:

Help Text:

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

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

Default Value: Show Formula Editor

Use formula editor. Write text and��击值 API 表达式 in double quotes (如“`Value`”), include numbers without commas (逗号) (如 123), show percentages as decimals (如 0.10), and express date calculations in the standard format: (Today) + 7. To reference a field from a Custom Metadata type record use: `!CustomMetadataType__NotRecurringName__c`

### 3. To Create a Fields & Relationship to an Object:

1. Go to setup >> click on Object Manager >> type object name(Laptop Booking) in the search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data Type as a “Lookup Relationship”
4. Click on Next

Laptop Bookings  
New Relationship

**Step 2. Choose the related object**

Select the other object to which this object is related.

Related To: Total Laptops

5. 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:

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 “Email”
  4. Click on Next and save it.
- Fill the records which you have created in consumer and laptop bookings and give relations also. After saving the records go to the laptop bookings object and edit lookup to master the detailed relationship.

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

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

1. After Creating the 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

The screenshot shows the 'New Custom Field' wizard for the 'Total Laptops' object. Step 1: Choose the field type. Under 'Data Type', the 'Roll-up Summary' option is selected. Other options like 'Auto Number', 'Formula', and 'Lookup Relationship' are also listed with their descriptions.

#### 4. Select Data type as a “Roll-up Summary” and Click on Next

Fill the Above as following:

- Field Label: Laptops delivered
- Field Name :It's gets auto generated

The screenshot shows Step 2: Enter the details. The 'Field Label' is set to 'Laptops delivered' and the 'Field Name' is 'Laptops\_delivered'. There are fields for 'Description' and 'Help Text' which are currently empty. A checkbox 'Add this field to existing custom report types that contain this entity' is checked.

- Click on Next

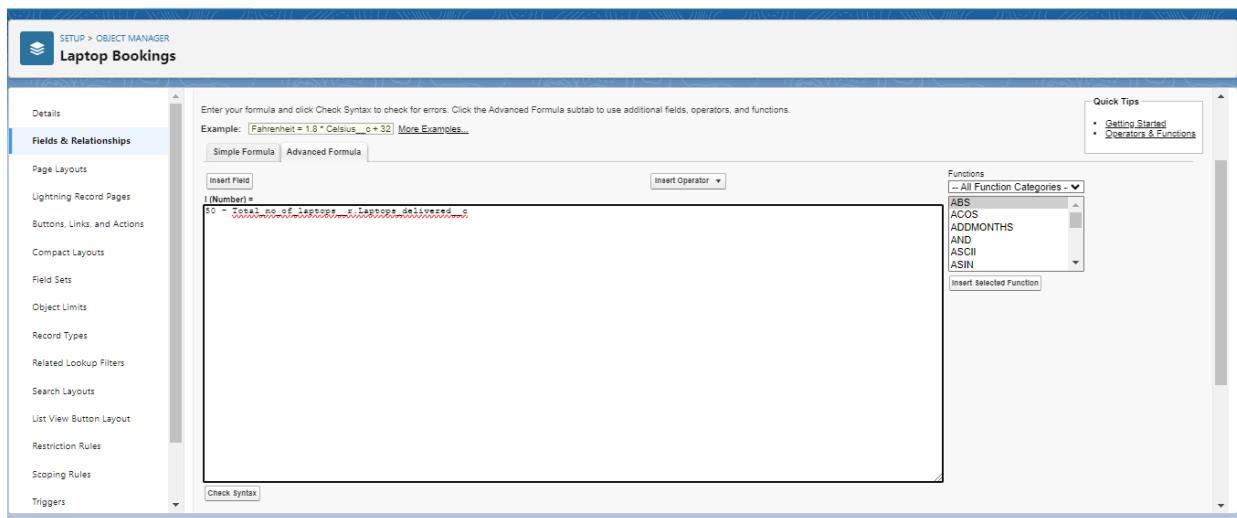
#### 6. Select the Laptop Bookings in the Summarized Object

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

The screenshot shows Step 3: Define the summary calculation. In the 'Select Object to Summarize' section, 'Total Laptops' is the master object and 'Laptop Bookings' is the summarized object. In the 'Select Roll-up Type' section, the 'COUNT' radio button is selected. In the 'Filter Criteria' section, the 'All records should be included in the calculation' checkbox is selected.

## 6. 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 than you will find a pop window under the Laptop Booking select the Total No Of Laptops in the second Column and select the Laptops delivered in the third column and click on insert
  - “ 50 - Total\_no\_of\_laptops\_\_r.Laptops\_delivered\_\_c ” and Check Syntax



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

## 7. 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” and give the field label as “laptop picklist”.
4. Picklist values are 1.2.3.4.5
5. Click and save it.

Laptop Bookings  
New Custom Field

**Step 2. Enter the details**

Field Label: ipicklist

Values:

- Use global picklist value set
- Enter values, with each value separated by a new line

Value entries:  
1  
2  
3  
4  
5  
6

Field Name:

Description:

Help Text:

Options:  
 Display values alphabetically, not in the order entered  
 Use first value as default value  
 Restrict picklist to the values defined in the value set

Step 2 of 4

Previous Next Cancel

## Task 13: 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

Billing Process  
New Custom Field

**Step 1. Choose the field type**

Specify the type of information that the custom field will contain.

Data Type:

- None Selected
- Auto Number
- Formula
- Roll-Up Summary
- Lookup Relationship
- Master-Detail Relationship
- External Lookup Relationship
- Checkbox

Master-Detail Relationship Description:

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

The relationship field is required on all detail records.

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create roll-up summary fields on the master record to summarize the detail records.

Relationship field Description:

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

External Lookup Relationship Description:

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Checkbox Description:

Allows users to select a True (checked) or False (unchecked) value.

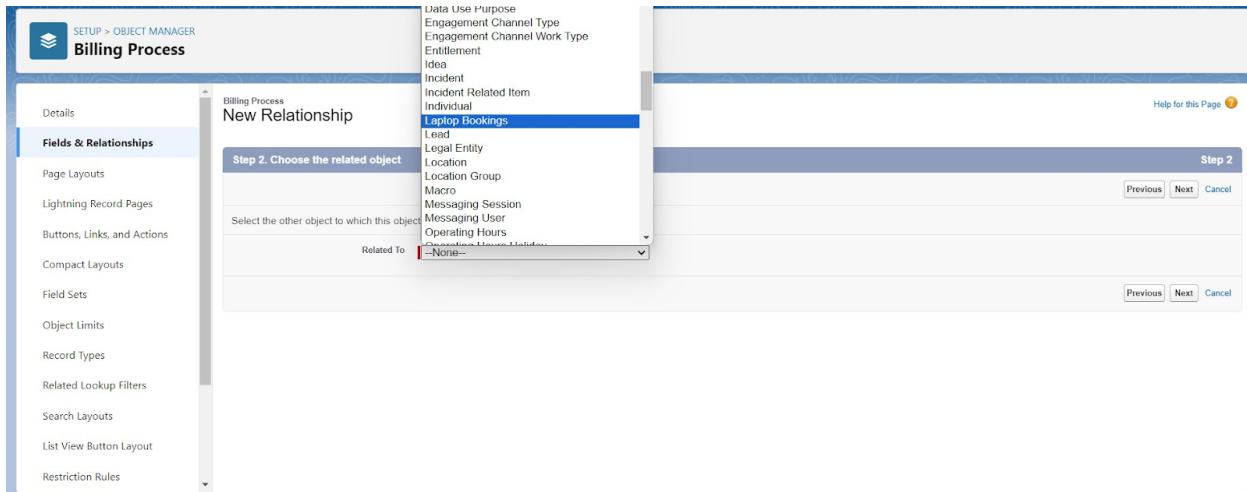
Step 1

Next Cancel

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:

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.

## Cross Object Formula Field:

In Salesforce, a cross-object formula field allows you to create a formula that references fields from related objects. It enables you to perform calculations or display data from related records without the need for custom code or complex workflows.

## Why do we need to create the Cross Object Formula Field:

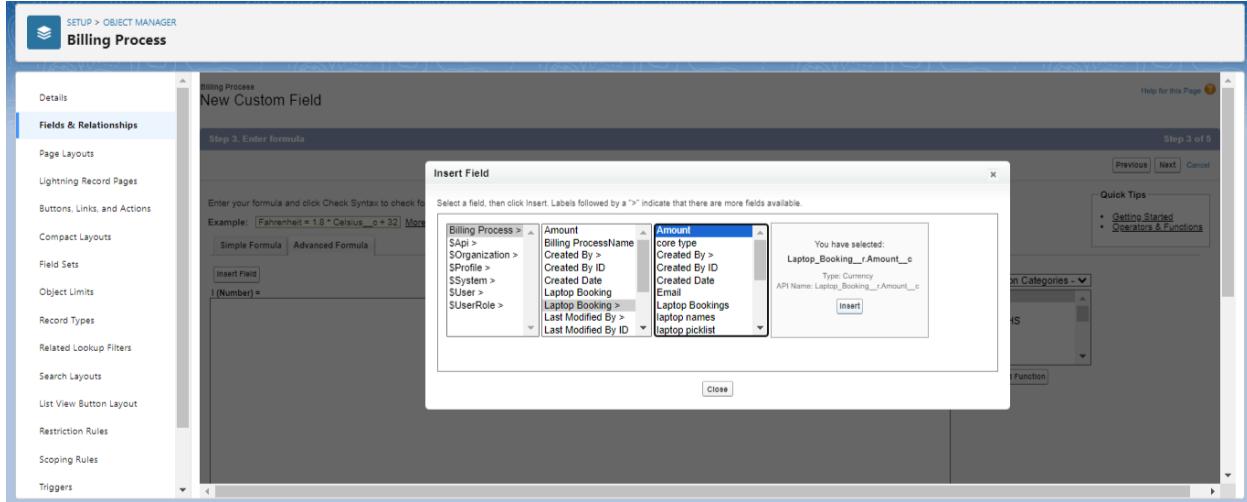
If we want to get the Particular field from another object in that case we will use the Cross object Formula field. For that First we need to create the relationship b/w two objects and relate the field with formula data type.

## 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.



## Task 14: 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”

The screenshot shows the 'Billing Process' object setup page. Under 'Fields & Relationships', a new custom field is being created. The formula editor shows the formula `50 - Laptops_delivered__c`. The right panel displays a list of functions under the 'ABS' category.

## 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

This screenshot shows the continuation of the custom field creation process. The formula remains `50 - Laptops_delivered__c`. The right panel shows the 'Quick Tips' section with links to 'Getting Started' and 'Operators & Functions'.

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

## Validation Rule

Validation rules in Salesforce are mechanisms that ensure data entered into records meets predefined

criteria. When a user attempts to save a record, the validation rule evaluates the data and triggers an error message if it does not satisfy the specified conditions, preventing the record from being saved until the issues are resolved.

The main purpose of validation rules is to maintain high data quality by enforcing standards that align with business requirements. They consist of a formula or expression that assesses the data entered in one or more fields, returning a Boolean value of "True" if the data is invalid and "False" if it is valid.

Each validation rule includes an error message that provides users with clear guidance on what went wrong, along with the option to specify where the error message appears. By implementing validation rules, organizations can improve data quality, provide user guidance, ensure consistency across records, and reduce errors, ultimately optimizing their data management practices.

In summary, validation rules are a powerful feature in Salesforce that play a critical role in maintaining data integrity and quality. By applying specific criteria to the data entered by users, these rules help organizations ensure that their information is accurate, consistent, and reliable. The combination of formulas, error messages, and user guidance makes validation rules an invaluable asset for any organization looking to optimize its data management practices.

## Task 15: Creating The Validation Rule For Phone Number Field In Consumer Object

### **Creating the validation rule for phone number field in consumer object**

1. Go to the setup page >> click on object manager >> From drop down click edit for consumer object.
2. Click on the validation rule >> click New.
  - Enter the Rule name as "Phonenumberoremailblankrule".
  - Enter the description as "phone number and email number should not be blank".
  - Enter the formula as "OR( ISBLANK( phone\_number\_\_c ) , ISBLANK( email\_\_c ) )" and check the syntax.

The screenshot shows the Salesforce Setup interface for managing objects. On the left, there's a sidebar with various tabs such as 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, Scoping Rules, and Triggers. The main area is titled "consumer Validation Rule". It contains a "Validation Rule Edit" form with fields for "Rule Name" (which is empty), "Active" (checked), and "Description" (empty). Below these is the "Error Condition Formula" section. The formula entered is "OR( ISBLANK( phone\_number\_\_c ), ISBLANK( email\_\_c ) )". A tooltip for the "ABS" function is displayed, showing its definition: "Returns the absolute value of a number; a number without its sign". There are also buttons for "Insert Field", "Insert Operator", "Check Syntax", and "No errors found". At the top right of the main area, there are "Save", "Save & New", and "Cancel" buttons, along with a "Help for this Page" link and a "Quick Tips" section containing a link to "Operators & Functions".

### 3. Save the validation rule.

# Profiles

A profile in Salesforce is a collection of settings and permissions that define what a user can do within the platform. Profiles control various aspects, including:

- **Object permissions:** Determine which objects a user can access and what actions they can perform (create, read, edit, delete)
- **Field permissions:** Specify which fields a user can view and edit within an object
- **User permissions:** Define additional permissions for users, such as the ability to manage other users or reset passwords
- **Tab settings:** Control which tabs are visible and accessible to users
- **App settings:** Determine which apps a user can access and use
- **Apex class access:** Specify which Apex classes a user can execute
- **Visualforce page access:** Define which Visualforce pages a user can access
- **Page layouts:** Determine the layout and sections displayed on pages for specific objects
- **Record Types:** Specify which record types are available to users
- **Login hours & Login IP ranges:** Restrict user access based on specific hours or IP addresses

Profiles are typically defined based on a user's job function, such as System Administrator, Developer, or Sales Representative. This allows for the creation of tailored permissions that align with the responsibilities and needs of different roles within an organization.

## Types of Profiles in Salesforce

1. **Standard Profiles:** Salesforce provides a set of predefined standard profiles by default
2. **Custom Profiles:** Custom profiles are created by the organization to suit specific needs

By leveraging profiles, Salesforce administrators can ensure that users have access to the necessary objects, fields, and functionality required for their roles while maintaining security and data integrity within the platform.

## Task 16: 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.

## Task 17: 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.

The screenshot shows the Salesforce Setup interface with the following details:

- Header:** Setup, Home, Object Manager.
- Search Bar:** Q profiles
- Left Sidebar:** Users, Profiles (selected).
- Middle Content:**
  - Profiles:** A table showing consent settings for various objects like Communication Subscription Consents, Contact Point Addresses, etc.
  - Custom Object Permissions:** Tables for Billing Process and consumer, showing permissions for Read, Create, Edit, Delete, View All, and Modify.
  - Session Settings:** Session Times Out After (2 hours of inactivity), Session Security Level Required at Login (-None-).
  - Password Policies:** User passwords expire in (90 days), Enforce password history (3 passwords remembered), Minimum password length (6), Password complexity requirement (Must include alpha and numeric characters), and Password question requirement (Cannot contain password).

4. Give access and save it.

# Roles And Hierarchy

In Salesforce, a role determines a user's visibility and access at the record level. Roles are utilized to define the types of data access that individuals within your Salesforce organization can have. Essentially, roles outline what information a user is able to see within the Salesforce environment.

## Types of Roles in Salesforce

### 1. Standard Roles:

Salesforce provides predefined standard roles that come with a default set of permissions for accessing various records. These roles are integral to the platform's functionality and cannot be deleted.

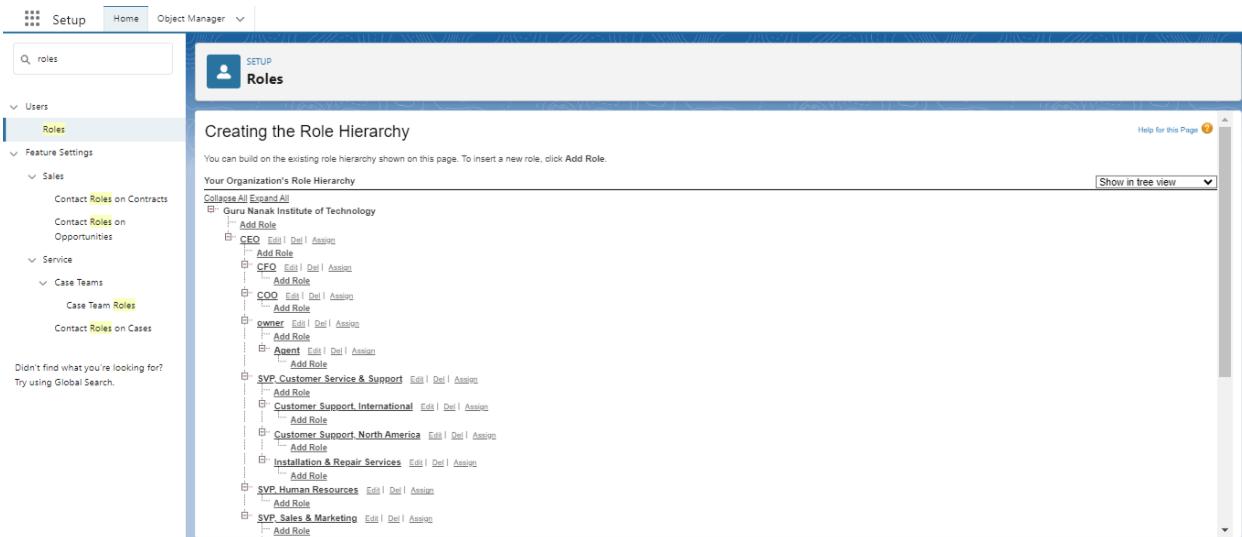
### 2. Custom Roles:

Organizations can create custom roles tailored to their specific needs. Unlike standard roles, custom roles can be deleted if there are no users assigned to them.

By establishing a clear role hierarchy, Salesforce ensures that users at higher levels have greater access to data than those at lower levels, facilitating effective data management and security within the organization.

## Task 18: 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.



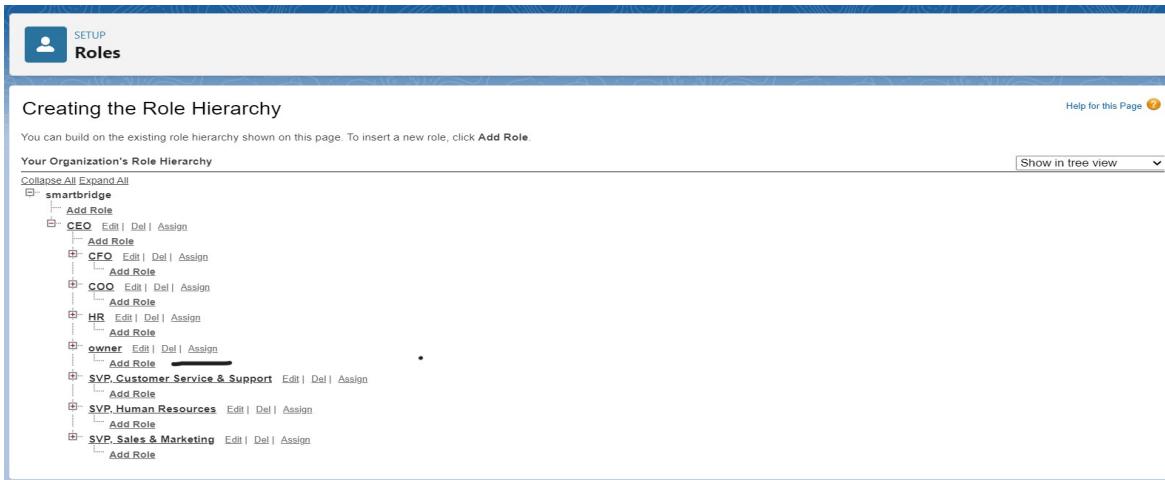
3. Give Label as "owner" and Role name gets auto populated. Then click on Save.

- Click and save it.

## Task 19: Creating Agent roles

Creating another two roles under manager

- Go to quick find - Search for Roles - click on set up roles.
- Click plus on CEO role, and click add role under owner.



- Give Label as "Agent" and Role name gets auto populated. Then click on Save.

## Users

In the context of Salesforce, a user refers to any individual who logs in to the platform. These users are typically employees within your organization, such as sales representatives, managers, and IT specialists, who require access to the company's records stored in Salesforce. Each user has a unique user account that serves to identify them and defines the specific features and records they can access based on their assigned settings.

The user account is a crucial element in Salesforce, as it ensures that users are properly identified and granted the appropriate level of access to perform their job functions effectively. The account settings, which include factors like user licenses, profiles, and roles, determine the extent of a user's capabilities within the platform. This level of control ensures that sensitive data remains secure while enabling users to efficiently utilize Salesforce to meet their business objectives.

By establishing user accounts and defining their associated settings, Salesforce administrators can effectively manage user access, maintain data integrity, and align user permissions with the organization's overall structure and requirements. This user management approach is essential for ensuring the smooth operation and optimal utilization of Salesforce within the company.

## Task 20: Create User

### **Activity 1: Create user 1**

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.

Q users

SETUP

Users

User Edit  
vicky y

User Edit

General Information

First Name: Vicky  
Last Name: y  
Alias: VY  
Email: 21831a0430@gnindia.org  
Username: Vicky@gnindia.org  
Nickname: Vicky123@gnindia.org  
Title:   
Company:   
Department:   
Division:

Role: owner  
User License: Salesforce  
Profile: owner  
Active:

Marketing User:   
Offline User:   
Knowledge User:   
Flow User:   
Service Cloud User:   
Site.com Contributor User:   
Site.com Publisher User:   
WDC User:

Data.com User Type: None  
Data.com Monthly Addition Limit: 300  
Accessibility Mode (Classic Only):   
High-Contrast Palette on Charts:   
Load Lightning Pages While Scrolling:   
Debug Mode:

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.

Q users

SETUP

Users

User Edit  
ram ram

User Edit

General Information

First Name: ram  
Last Name: ram  
Alias: ram  
Email: 21831a0430@gnindia.org  
Username: ram@gnindia.org  
Nickname: ram123@gnindia.org  
Title:   
Company:   
Department:   
Division:

Role: Agent  
User License: Salesforce Platform  
Profile: Standard Platform User  
Active:

Marketing User:   
Offline User:   
Knowledge User:   
Flow User:   
Service Cloud User:   
Site.com Contributor User:   
Site.com Publisher User:   
WDC User:

Data.com User Type: None  
Data.com Monthly Addition Limit: 300  
Accessibility Mode (Classic Only):   
High-Contrast Palette on Charts:   
Load Lightning Pages While Scrolling:   
Debug Mode:

13. 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:

1. **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.
2. **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.
3. **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.
4. **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.
5. **Scheduled Flows:** These are flows that you can schedule to run at specific times or intervals. They are often used for automating recurring tasks.
6. **Flow Elements:** Flow Builder offers various elements that you can use to create flows, such as variables, decisions, loops, and more. These elements allow you to build sophisticated logic into your flows.
7. **Subflows:** Subflows are reusable flow elements that you can incorporate into multiple flows, making it easier to manage and maintain complex processes.
8. **Record-Triggered Flows:** These are flows that are triggered when records meet specified criteria. They are often used for automating record updates and related actions.

## Why do we need to create a flow:

In summary, creating a flow in Salesforce is crucial for automating tasks, streamlining processes, and enhancing user experiences. It empowers organizations to operate more efficiently while maintaining high standards of data quality and operational consistency.

## Task 21: Create A Flow On Dell Laptop

1. Go to setup >> type Flow in quick find box >> Click on the Flow and Select the New Flow.

The screenshot shows the Salesforce Setup Flows page. At the top, there is a search bar with 'flows' typed into it. Below the search bar, there are navigation links for 'Process Automation', 'Flows' (which is highlighted in yellow), and 'Identity'. There is also a link to 'Login Flows' and a note about using Global Search. A section titled 'Try the Automation Lightning App!' provides information about new features available in the app, such as search automation, sorting options, and organization by categories. The main area displays a table of flows with columns for 'Flow Label', 'Process Type', 'Active', 'Template', 'Package State', 'Packag...', 'Last Modifi...', and 'Last Modified Date'. The table lists various flows like 'Add or Modify Service Appointment Attendees', 'Basic Approval Request', etc. A URL at the bottom of the page is <https://eurunananikinstituteoftec-10b-dev-ed.lightning.force.com/lightning/setup/Flows/home>.

2. Select the Record-triggered flow and Click on Create.

The screenshot shows the 'Select Type' screen for creating a new flow. It has two sections: 'Recommended' and 'All Flow Types'. In the 'Recommended' section, 'Record-Triggered Flow' is selected and highlighted with a blue border. Below it, other options include 'Screen Flow', 'Schedule-Triggered Flow', and 'Autolaunched Flow (No Trigger)'. In the 'All Flow Types' section, 'Autolaunched Flow (No Trigger)' and 'Autolaunched Orchestration (No Trigger)' are listed. At the bottom right of the screen is a 'Create' button.

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.

Configure Start

### Select Object

Select the object whose records trigger the flow when they're created, updated, or deleted.

\* Object  
Laptop Bookings

### Configure Trigger

\*Trigger the Flow When:

- A record is created
- A record is updated
- A record is created or updated
- A record is deleted

### Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Cancel Done

Configure Start

### Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements  
None

### \*Optimize the Flow for:

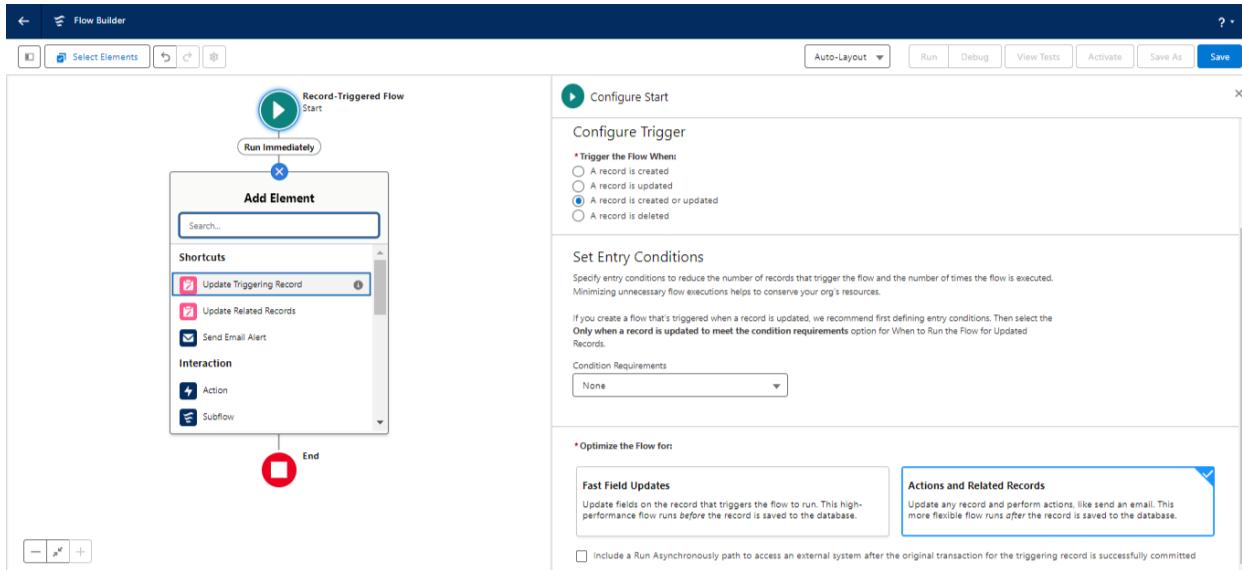
**Fast Field Updates**  
Update fields on the record that triggers the flow to run. This high-performance flow runs *before* the record is saved to the database.

**Actions and Related Records**  
Update any record and perform actions, like send an email. This more flexible flow runs *after* the record is saved to the database.

Include a Run Asynchronously path to access an external system after the original transaction for the triggering record is successfully committed

Cancel 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.

- 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.

Edit Decision

\* Label: field should updated \* API Name: field\_should\_updated

Description: the field should be automatically updated

Outcomes For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

OUTCOME ORDER	OUTCOME DETAILS	Delete Outcome
dell	* Label: dell * Outcome API Name: dell	<a href="#">Delete Outcome</a>
acer		
hp	Condition Requirements to Execute Outcome: All Conditions Are Met (AND)	
mac		
false	Resource: \$Record > Laptop names, Operator: Equals, Value: Dell	<a href="#">Delete</a>

Cancel Done

- Go to flow page
- Check the flow chart.
- Beside dell there is a symbol '+' click on that.
- Again select decision
- Enter the Details Label: Field should Update(any one u want), API name: Gets 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

16. 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.

17. Click done.

The screenshot shows the 'Edit Decision' screen. At the top, there are fields for 'Label' (field updated) and 'API Name' (field\_updated). Below this is a 'Description' text area. The main section is titled 'Outcomes' with the sub-instruction: 'For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.' A table lists outcomes:

OUTCOME ORDER	OUTCOME DETAILS	DELETE OUTCOME
1	* Label: dell core i3 * Outcome API Name: dellcore_i3 Condition Requirements to Execute Outcome: All Conditions Are Met (AND) Resource: \$Record > core type Operator: Equals Value: core i3	<a href="#">Delete Outcome</a>
2	* Label: dell core i5 * Outcome API Name: dellcore_i5	<a href="#">Delete Outcome</a>
3	* Label: dell core i7 * Outcome API Name: dellcore_i7	<a href="#">Delete Outcome</a>

At the bottom right are 'Cancel' and 'Done' buttons.

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

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

20. 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.

21. 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..

22. Click '+' outcome details

23. 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..
24. Click '+' outcome details
25. 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..
26. Click '+' outcome details
27. 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.
- Edit Decision
- 
- Outcomes For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.
- | OUTCOME ORDER | OUTCOME DETAILS                | Condition Requirements to Execute Outcome | Resource                   | Operator | Value |
|---------------|--------------------------------|---|----------------------------|----------|-------|
| 1             | *Label<br>1<br>*API Name<br>X1 | All Conditions Are Met (AND)              | \$Record > how many months | Equals   | 1     |
| 2             |                                |   |                            |          |       |
| 3             |                                |   |                            |          |       |
| 4             |                                |   |                            |          |       |
| 5             |                                |   |                            |          |       |
- Cancel Done
28. Follow the above picture you will understand.
29. After dell 1(i3) there is '+' symbol like dell 2(i3),dell3(i3),dell 4(i3),dell5(i3).
30. Click on '+' then select update records
31. Enter the Details Label: one month of dell i3 rate
32. API name: Gets Automatically Generated.
33. Field:- Amount\_\_c
34. value:- for dell 1(i3)-1000, dell 2(i3)-2000, dell 3(i3)-3000, dell 4(i3)-4000, dell 5(i3)-5000.
35. Follow all these finally.
36. Click done.
37. Enter the Details Label: months selected , API name: Gets Automatically Generated.
38. Enter the Outcome Details Label: dell 1(i7) , Outcome API name: Gets Automatically

Generated.

39.

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

40. 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..

41. Click ‘+’ outcome details

42. 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..

43. Click ‘+’ outcome details

44. 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.

45. Click ‘+’ outcome details

46. 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.

Edit Decision

* Label	* API Name																			
months selected	months_selected																			
Description																				
<p>Outcomes For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.</p> <table border="1"> <thead> <tr> <th>OUTCOME ORDER</th> <th>OUTCOME DETAILS</th> <th></th> </tr> </thead> <tbody> <tr> <td>1</td> <td>* Label 1</td> <td>* Outcome API Name X1</td> </tr> <tr> <td>2</td> <td colspan="2">Condition Requirements to Execute Outcome</td> </tr> <tr> <td>3</td> <td colspan="2">All Conditions Are Met (AND)</td> </tr> <tr> <td>4</td> <td colspan="2"></td> </tr> <tr> <td>5</td> <td>Resource \$Record &gt; how many months X</td> <td>Operator Equals</td> <td>Value 1</td> </tr> </tbody> </table>		OUTCOME ORDER	OUTCOME DETAILS		1	* Label 1	* Outcome API Name X1	2	Condition Requirements to Execute Outcome		3	All Conditions Are Met (AND)		4			5	Resource \$Record > how many months X	Operator Equals	Value 1
OUTCOME ORDER	OUTCOME DETAILS																			
1	* Label 1	* Outcome API Name X1																		
2	Condition Requirements to Execute Outcome																			
3	All Conditions Are Met (AND)																			
4																				
5	Resource \$Record > how many months X	Operator Equals	Value 1																	
<input type="button" value="Delete Outcome"/> <input type="button" value="Cancel"/> <input type="button" value="Done"/>																				

47. Follow the above picture you will understand.
48. After dell 1(i7) there is '+' symbol like dell 2(i7), dell 3(i7), dell 4(i7), dell 5(i7).
49. Click on '+' then select update records
50. Enter the Details Label: one month of dell i5 rate , API name: Gets Automatically Generated.
51. 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
52. Click done.

## Task 22: 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.

Edit Decision

**Outcomes** For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

OUTCOME ORDER	OUTCOME DETAILS	
<input type="button" value="acer core i3"/> <input type="button" value="acer core i5"/> <input type="button" value="acer core i7"/> <b>Default Outcome</b>	<p>*Label <input type="text" value="acer core i3"/></p> <p>*Outcome API Name <input type="text" value="acer_core_i3"/></p> <p>Condition Requirements to Execute Outcome <input type="button" value="All Conditions Are Met (AND)"/></p> <p>Resource <input type="text" value="\$Record &gt; core type"/> Operator <input type="button" value="Equals"/> Value <input type="text" value="core i3"/></p> <p><input type="button" value="+ Add Condition"/></p> <p><b>When to Execute Outcome</b> <input checked="" type="radio" value="If the condition requirements are met"/> <input type="radio" value="Only if the record that triggered the flow to run is updated to meet the condition requirements"/></p>	<input type="button" value="Delete Outcome"/> <input type="button" value="Cancel"/> <input type="button" value="Done"/>

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.
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.

Edit Decision

*Label acer months selected	*API Name acer_months_selected		
Description  			
Outcomes For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.			
OUTCOME ORDER <span style="border: 1px solid #ccc; padding: 2px;">1</span> <span style="border: 1px solid #ccc; padding: 2px; margin-left: 10px;">+</span>	OUTCOME DETAILS		
acer 1(i3)	*Label acer 1(i3)	*Outcome API Name acer_1_i3	
acer 2(i3)			
acer 3(i3)		Condition Requirements to Execute Outcome All Conditions Are Met (AND)	
acer 4(i3)	Resource \$Record > how many months	Operator Equals	Value 1
acer 5(i3)			
<span style="border: 1px solid #ccc; padding: 2px;">Cancel</span> <span style="background-color: #0070C0; color: white; border: 1px solid #0070C0; padding: 2px;">Done</span>			

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

## Edit Update Records

one month of acer i3 rate (one\_month\_of\_acer\_i3\_rate) 

\* How to Find Records to Update and Set Their Values

- Use the laptop bookings record that triggered the flow
- Update records related to the laptop bookings record that triggered the flow
- Use the IDs and all field values from a record or record collection
- Specify conditions to identify records, and set fields individually

### Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record

### Set Field Values for the Laptop Bookings Record

Field	Value	Actions
Amount_c	900	

[+ Add Field](#)

[Cancel](#) [Done](#)

23.Click done.

## Task 23: 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. Here,

- 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.

## Edit Decision

**Outcomes** For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

OUTCOME ORDER <span style="color: #0070C0;">?</span> <span style="font-size: 1.5em;">+</span>	OUTCOME DETAILS	<span style="border: 1px solid #ccc; padding: 2px;">Delete Outcome</span>	
hp core i3	*Label <input type="text" value="hp core i5"/>	*Outcome API Name <input type="text" value="hp_core_i5"/>	
hp core i5	Condition Requirements to Execute Outcome <input type="button" value="All Conditions Are Met (AND)"/>		
hp core i7			
Default Outcome	Resource <input type="text" value="\$Record &gt; core type"/>	Operator <input type="text" value="Equals"/>	Value <input type="text" value="core i5"/>
	<span style="border: 1px solid #ccc; padding: 2px;">+ Add Condition</span>		
<b>When to Execute Outcome <span style="color: #0070C0;">?</span></b>			
<input checked="" type="radio"/> If the condition requirements are met			
<input type="radio"/> Only if the record that triggered the flow to run is updated to meet the condition requirements			

Cancel

Done

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

## Edit Update Records

**one month of hp i5 rate** (one\_month\_of\_hp\_i5\_rate) 

\* **How to Find Records to Update and Set Their Values**

- Use the laptop bookings record that triggered the flow
- Update records related to the laptop bookings record that triggered the flow
- Use the IDs and all field values from a record or record collection
- Specify conditions to identify records, and set fields individually

### Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record

### Set Field Values for the Laptop Bookings Record

Field	Value	Actions
Amount_c	1700	

**Add Field**  

Click done.

## Task 24: 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.

Edit Decision

* Label	* API Name																
mac field should be updated	mac_field_should_be_updated																
Description																	
<p>Outcomes For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.</p> <table border="1"> <tr> <td><b>OUTCOME ORDER</b> <span style="color: #0070C0;">(1)</span> <span style="font-size: 2em;">+</span></td> <td><b>OUTCOME DETAILS</b></td> </tr> <tr> <td>mac laptop</td> <td>* Label mac laptop * Outcome API Name mac_laptop</td> </tr> <tr> <td colspan="2">Default Outcome</td> </tr> <tr> <td colspan="2">Condition Requirements to Execute Outcome</td> </tr> <tr> <td colspan="2">All Conditions Are Met (AND)</td> </tr> <tr> <td>Resource <span style="border: 1px solid #ccc; padding: 2px;">\$Record &gt; core type X</span></td> <td>Operator Equals</td> <td>Value Bionic chip <span style="border: 1px solid #ccc; padding: 2px;">X</span></td> </tr> <tr> <td colspan="3"><span style="font-size: 0.8em;">+ Add Condition</span></td> </tr> </table>		<b>OUTCOME ORDER</b> <span style="color: #0070C0;">(1)</span> <span style="font-size: 2em;">+</span>	<b>OUTCOME DETAILS</b>	mac laptop	* Label mac laptop * Outcome API Name mac_laptop	Default Outcome		Condition Requirements to Execute Outcome		All Conditions Are Met (AND)		Resource <span style="border: 1px solid #ccc; padding: 2px;">\$Record &gt; core type X</span>	Operator Equals	Value Bionic chip <span style="border: 1px solid #ccc; padding: 2px;">X</span>	<span style="font-size: 0.8em;">+ Add Condition</span>		
<b>OUTCOME ORDER</b> <span style="color: #0070C0;">(1)</span> <span style="font-size: 2em;">+</span>	<b>OUTCOME DETAILS</b>																
mac laptop	* Label mac laptop * Outcome API Name mac_laptop																
Default Outcome																	
Condition Requirements to Execute Outcome																	
All Conditions Are Met (AND)																	
Resource <span style="border: 1px solid #ccc; padding: 2px;">\$Record &gt; core type X</span>	Operator Equals	Value Bionic chip <span style="border: 1px solid #ccc; padding: 2px;">X</span>															
<span style="font-size: 0.8em;">+ Add Condition</span>																	
<span style="border: 1px solid #ccc; padding: 2px 10px; margin-right: 10px;">Cancel</span> <span style="background-color: #0070C0; color: white; border: 1px solid #0070C0; padding: 2px 10px; font-weight: bold;">Done</span>																	

Click done.

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.
- Value: Select 5.

Edit Decision

mac months selected (mac\_months\_selected)

Outcomes For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

OUTCOME ORDER	OUTCOME DETAILS	Actions
mac bionic chip(1)	*Label: mac bionic chip(1) *Outcome API Name: mac_bionic_chip_1 Condition Requirements to Execute Outcome: All Conditions Are Met (AND)	Delete Outcome
mac bionic chip(2)		
mac bionic chip(3)		
mac bionic chip(4)		
mac bionic chip(5)		
Default Outcome	Resource: \$Record > how many months X Operator: Equals Value: 1 <a href="#">+ Add Condition</a>	

When to Execute Outcome

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

[Cancel](#) [Done](#)

Click done.

19. After mac bionic chip(1) there is '+' symbol like mac bionic chip(2), mac bionic chip(3), mac bionic chip(4), mac bionic chip(5).

20. Click on '+' then select update records

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

22. Field:- Amount\_\_c , value:- for one month of mac bionic chip rate-1700, two month of mac bionic chip rate-3400, three month of mac bionic chip rate-5100, four month of mac bionic chip rate-6800, five month of mac bionic chip rate-8500. Follow for all these finally

## Edit Update Records

\* How to Find Records to Update and Set Their Values

Use the laptop bookings record that triggered the flow  
 Update records related to the laptop bookings record that triggered the flow  
 Use the IDs and all field values from a record or record collection  
 Specify conditions to identify records, and set fields individually

### Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record

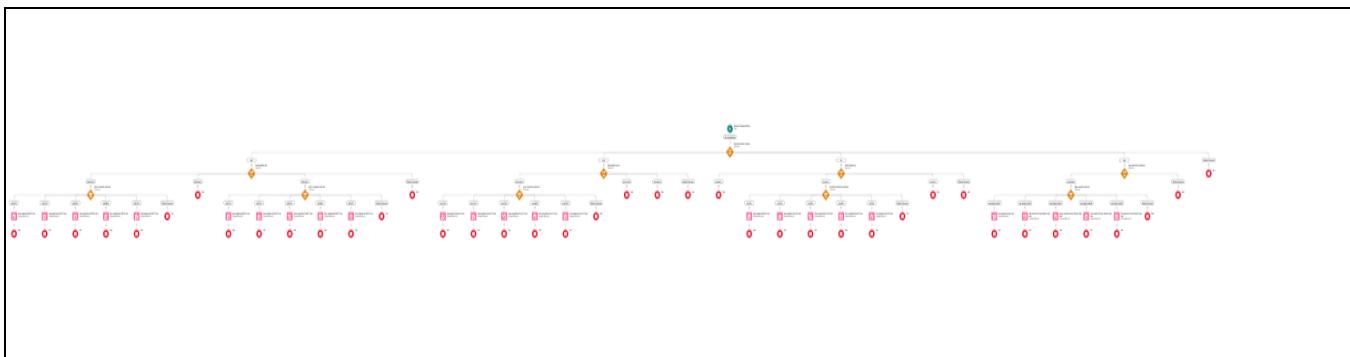
### Set Field Values for the Laptop Bookings Record

Field	Value
Amount_c	2000

Cancel Done

23. Click done.

## FLOW:



- Click on save .
- Label:- Laptop distributions, api name:- automatically filled
- Save the flow and activate it.

# APEX

Apex is a powerful, object-oriented programming language that allows developers to execute flow and transaction control statements on the Salesforce platform server, in conjunction with calls to the Salesforce API. Apex code resembles Java syntax and functions similar to database stored procedures, enabling developers to add business logic to various system events, such as button clicks, related record updates, and Visualforce pages. Additionally, Apex code can be initiated by web service requests and from triggers on objects.

Apex shares many similarities with Java, including support for object-oriented programming (OOP) concepts like classes, objects, and methods.

## Creating Classes in Apex

Apex classes are modeled after their counterparts in Java. Developers can define, instantiate, and extend classes, as well as work with interfaces, Apex class versions, properties, and other related class concepts.

### **Class**

Similar to Java, Apex allows the creation of classes. A class serves as a template or blueprint from which objects are created. An object is an instance of a class.

### **Object**

An object is an instance of a class in Apex. When an object is created, it can access all the properties present in the class, including variables and methods.

By leveraging Apex's object-oriented programming capabilities, developers can create modular, reusable code that enhances the functionality and flexibility of Salesforce applications. The language's syntax and behavior, which closely resemble Java, make it easier for developers familiar with Java to transition to Apex development.

## Access specifiers in Apex

Apex allows you to use the private, protected, public, and global access modifiers when defining methods and variables.

While triggers and anonymous blocks can also use these access modifiers, they aren't as useful in smaller portions of Apex. For example, declaring a method as global in an anonymous block doesn't enable you to call it from outside of that code.

### **Private:**

This access modifier is the default, and means that the method or variable is accessible only within the Apex class in which it's defined. If you don't specify an access modifier, the method or variable is private.

### **Protected:**

This means that the method or variable is visible to any inner classes in the defining Apex class, and to the classes that extend the defining Apex class. You can only use this access

modifier for instance methods and member variables. This setting is strictly more permissive than the default (private) setting, just like Java.

### **Public :**

This means that the method or variable is accessible by all Apex within a specific package. For accessibility by all second-generation (2GP) managed packages that share a namespace, use public with the @NamespaceAccessible annotation. Using the public access modifier in no-namespace packages implicitly renders the Apex code as @NamespaceAccessible.

### **Global:**

This means the method or variable can be used by any Apex code that has access to the class, not just the Apex code in the same application. This access modifier must be used for any method that must be referenced outside of the application, either in SOAP API or by other Apex code. If you declare a method or variable as global, you must also declare the class that contains it as global. This is how a new class is created :

```
1 ▾ public class Student {  
2  
3 }
```

## **Triggers**

A trigger is a set of Apex code that runs before or after DML(Data Manipulation Language) events.

A DML event could be a variety of data processing tasks that include the standard insert, update, and delete commands.

With Apex triggers, you can automate tasks that would otherwise be nearly impossible to accomplish using only the Salesforce user interface. Triggers enable you to create custom scripts that you can implement according to your needs, and the only limitation is your coding skills.

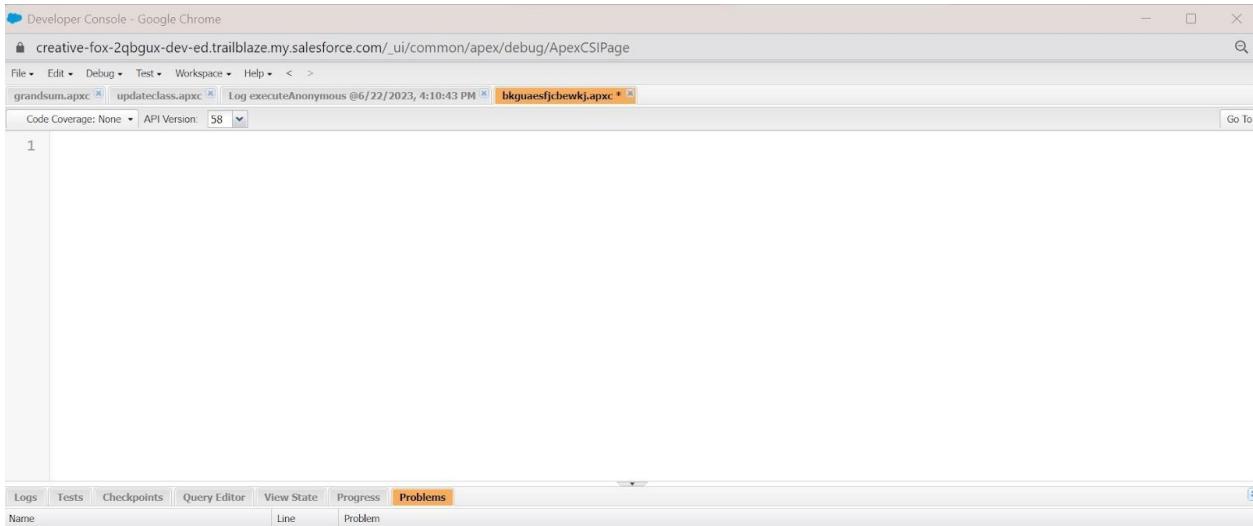
There are two Salesforce Apex trigger types:

1. **Before triggers.** These are helpful in cases that require a validation process before accepting a change. They run before any database changes.
2. **After triggers.** These are helpful in cases where you need to modify your database records and when the necessary value is stored in other records. They run after any database changes. Both types will help you perform custom tasks and manage records effectively. They can help you perform bulk actions as they can handle several records simultaneously.

# Task 25: Create an APEX Class

## 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.

You need to give the following options:

- Class name:- LaptopBookingHandler
- API Name:- Laptop\_Bookings\_\_c(as per your org go to laptop booking object and copy from that).
- core\_type\_\_c (as per your org go to laptop booking object and copy from that).
- laptop\_names\_\_c(as per your org go to laptop booking object and copy from that).

## The code snippet for the apex class is:

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

```

```

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 wi
10            email.setPlainTextBody(body);
11            Messaging.sendEmail(new List<Messaging.SingleEmailMessage>{email});
12        }
13    }
14 }

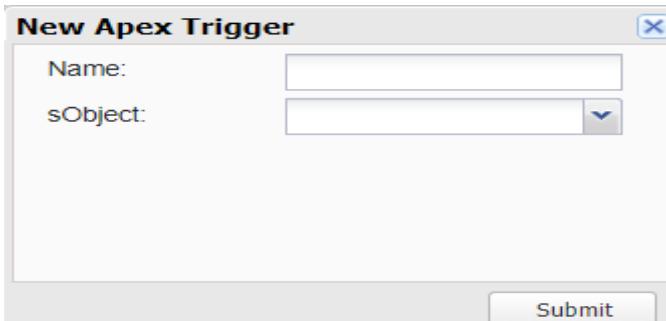
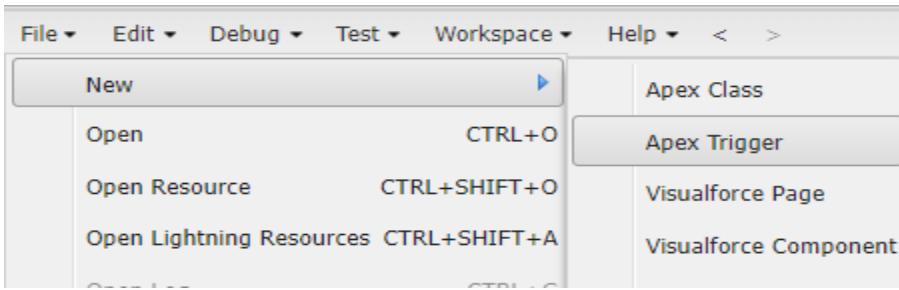
```

## Task 26: Create an APEX Trigger

### 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.

Enter the trigger name and the object to be triggered.

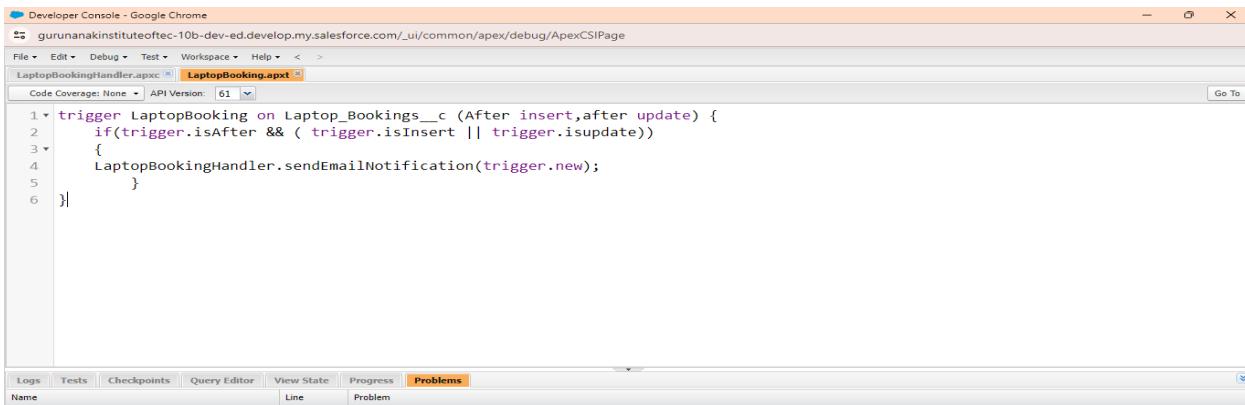


You need to give the following options:

1. LaptopBooking - trigger name
2. Laptop\_Bookings\_\_c - as per your org(go to laptop bookings object and copy from that object api name).

### **The code snippet for the apex trigger is:**

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



# 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.

## Task 27: Create Report

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

## 2. Click New Report.

The screenshot shows the Microsoft Dynamics 365 Reports interface. At the top, there is a navigation bar with links for 'LAPTOP RENTALS', 'Total Laptops', 'consumer', 'Laptop Bookings', 'Billing Process', and 'Reports'. Below the navigation bar is a search bar labeled 'Search...'. On the left, a sidebar lists categories: 'RECENT', 'Created by Me', 'Private Reports', 'Public Reports', 'All Reports', 'FOLDERS', 'All Folders', 'Created by Me', 'Shared with Me', and 'FAVORITES', 'All Favorites'. The main area displays a table titled 'Recent' with one item: 'consumer with laptops and total laptops' (Report Name), 'Private Reports' (Folder), 'Likitha Sai' (Created By), and '8/8/2024, 10:07 pm' (Created On). There is also a 'Subscribed' column with a checkmark. At the bottom of the main area, there is a message 'javascript:void(0);'.

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.

The screenshot shows the 'Create Report' dialog. On the left, a sidebar titled 'Category' lists various report types: 'Recently Used', 'All' (which is selected), 'Accounts & Contacts', 'Opportunities', 'Customer Support Reports', 'Leads', 'Campaigns', 'Activities', 'Contracts and Orders', 'Price Books, Products and Assets', 'Administrative Reports', and 'File and Content Reports'. In the center, there is a search bar labeled 'Select a Report Type' with the query 'consumer with Laptop Bookings and total laptops'. Below the search bar, it says 'Showing results for consumer with Laptop Bookings and total laptops'. A table titled 'Report Type Name' shows one result: 'consumer with Laptop Bookings and Total Laptops' under 'Category Standard'. On the right, the 'Details' panel shows the report type 'consumer with Laptop Bookings...' (Standard Report Type) with a 'Start Report' button. It also includes sections for 'Created By You' (listing 'consumer with laptops and total lapt...'), 'Created By Others' (listing 'No Reports Yet'), and 'Objects Used in Report Type' (listing 'Laptop Bookings' and 'User').

4. Customize your report

5. Add fields from left pane as shown below

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

- Report Title:** consumer with laptops and total laptops
- Report Type:** consumer with Laptop Bookings and Total Laptops
- Fields:**
  - Groups: GROUP ROWS (Add group...), GROUP COLUMNS (Add group...)
  - Columns: consumer: consumer\_name, consumer: ID, Phone number, Email, Laptop Bookings ID, core type, Total No Of Laptops: Total Laptops, laptop picklist, # Amount
- Table Data:**

	consumer: consumer_name	consumer: ID	Phone number	Email	Laptop Bookings ID	core type	Total No Of Laptops: Total Laptops	laptop picklist	# Amount
Intermediate (1)	Lakshmi	a01dL00000OQpEW	1234567890	lakshmi@123.com	a02dL000003tvTl	core i3	1		₹1,000
									₹1,000
Subtotal									
High (9)	Riyal	a01dL00000OR1gX	2345678912	riyal@123.com	a02dL000003tJn	Core i7	1		₹2,000
	Sai	a01dL00000OQeOr	9987654321	sai@123.com	a02dL000003tJnd	core i3	2		₹2,000
	Rustyn	a01dL00000OR4BO	3456789123	rustyn@123.com	a02dL000003tjW	Core i5	3		₹5,100
	Kristina	a01dL00000OR6Y9	7894561230	kristina@123.com	a02dL000003tqj0	Core i5	2		₹6,800
	Natasha	a01dL00000OR7UD	5678901233	natasha@123.com	a02dL000003tvNK	bionic chip	2		₹3,400
	Krishna	a01dL00000OQhNx	1236547891	krishna@123.com	a02dL000003tvhZ	Core i7	1		₹6,000
	Raju	a01dL00000OR4cn	5678904321	raju@123.com	a02dL000003tv49	core i3	3		₹2,700
	Mary	a01dL00000OR4eQ	3216549870	mary@123.com	a02dL000003tvSL	core i3	1		₹4,800
	Zac	a01dL00000ORSp4	3647589210	zac@123.com	a02dL000003tyRd	bionic chip	1		₹8,500
Subtotal									₹41,300
Total (10)									₹42,300
- Buttons:** Add Chart, Save & Run, Save, Close, Run

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

### Edit Bucket Column

\* Field

\* Bucket Name

Amount

types of versions

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

Treat empty Amount values in the report as zeros.

Cancel

Apply

Click apply it.

Follow the picture and save or run it.

LAPTOP RENTALS    Total Laptops    consumer    Laptop Bookings    Billing Process    \* consumer with laptops an...    X

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

Total Records    Total Amount  
10    ₹42,300

	Types of versions	consumer: consumer_name	consumer: ID	Phone number	Email	Laptop Bookings: ID	core type	Total No Of Laptops: Total Laptops	laptop picklist	Amount
Intermediate (1)		Lakshmi	a01d00000QpEW	1234567890	lakshmi@123.com	a02d000003tvTl	core i3	1		₹1,000
<b>Subtotal</b>										₹1,000
High (9)		Riyal	a01d00000OR1gK	2345678912	riyal@123.com	a02d000003tuJn	Core i7	1		₹2,000
		Sai	a01d00000Qe0r	9897654321	sai@123.com	a02d000003tjnd	core i3	2		₹2,000
		Rustyn	a01d00000OR4BO	3456789123	rustyn@123.com	a02d000003trjW	Core i5	3		₹5,100
		Kristina	a01d00000OR6Y9	7894561230	kristina@123.com	a02d000003tj0	Core i5	2		₹6,800
		Natasha	a01d00000OR7UD	5678901233	natasha@123.com	a02d000003tvNK	bionic chip	2		₹3,400
		Krishna	a01d00000QeNx	1236547891	krishna@123.com	a02d000003tvhZ	Core i7	1		₹6,000
		Raju	a01d00000OR4cn	5678904321	raju@123.com	a02d000003tu49	core i3	3		₹2,700
		Mary	a01d00000OR4eQ	3216549870	mary@123.com	a02d000003tvSL	core i3	1		₹4,800
		Zac	a01d00000OR5p4	3647589210	zac@123.com	a02d000003tyRd	bionic chip	1		₹8,500
<b>Subtotal</b>										₹41,300
<b>Total (10)</b>										₹42,300

Row Counts    Detail Rows    Subtotals    Grand Total

## Task 28: Sharing Report To Owner

- Click edit drop down and select subscribe option

LAPTOP RENTALS    Total Laptops    consumer    Laptop Bookings    Billing Process    \* consumer with laptops an...    X

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

Total Records    Total Amount  
10    ₹42,300

	Types of versions	consumer: consumer_name	consumer: ID	Phone number	Email	Laptop Bookings: ID	core type	Total No Of Laptops: Total Laptops	laptop picklist	Amount
Intermediate (1)		Lakshmi	a01d00000QpEW	1234567890	lakshmi@123.com	a02d000003tvTl	core i3	1		₹1,000
<b>Subtotal</b>										₹1,000
High (9)		Riyal	a01d00000OR1gK	2345678912	riyal@123.com	a02d000003tuJn	Core i7	1		₹2,000
		Sai	a01d00000Qe0r	9897654321	sai@123.com	a02d000003tjnd	core i3	2		₹2,000
		Rustyn	a01d00000OR4BO	3456789123	rustyn@123.com	a02d000003trjW	Core i5	3		₹5,100
		Kristina	a01d00000OR6Y9	7894561230	kristina@123.com	a02d000003tj0	Core i5	2		₹6,800
		Natasha	a01d00000OR7UD	5678901233	natasha@123.com	a02d000003tvNK	bionic chip	2		₹3,400
		Krishna	a01d00000QeNx	1236547891	krishna@123.com	a02d000003tvhZ	Core i7	1		₹6,000
		Raju	a01d00000OR4cn	5678904321	raju@123.com	a02d000003tu49	core i3	3		₹2,700
		Mary	a01d00000OR4eQ	3216549870	mary@123.com	a02d000003tvSL	core i3	1		₹4,800
		Zac	a01d00000OR5p4	3647589210	zac@123.com	a02d000003tyRd	bionic chip	1		₹8,500
<b>Subtotal</b>										₹41,300
<b>Total (10)</b>										₹42,300

Enable Field Editing    Add Chart    Edit    Save As    Save    **Subscribe**    Export    Delete    Add to Dashboard

- Follow as per below image.

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

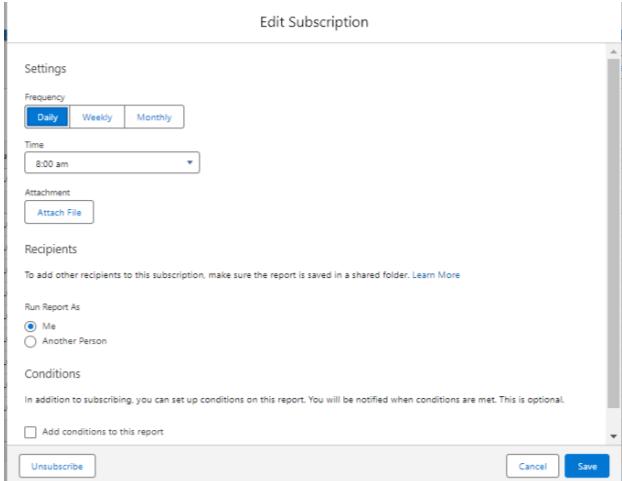
Me  
 Another Person

Conditions

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

Add conditions to this report

Unsubscribe Cancel Save



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

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

# Dashboards

Salesforce dashboards are powerful visualization tools that provide users with a comprehensive overview of key metrics and trends within their organization. By condensing multiple reports into visual formats such as graphs, charts, tables, and metrics, dashboards enable users to quickly understand changing business conditions and make informed decisions based on real-time data.

## Key Features of Salesforce Dashboards

1. **Visual Representation of Data:** Dashboards transform complex data sets into easily digestible visuals, allowing decision-makers to review significant amounts of information at a glance. This visual approach helps in identifying trends, sorting quantities, and measuring the impact of various activities.
2. **Customization:** Salesforce dashboards are highly customizable, enabling users to tailor the display parameters to meet their specific business needs. Users can choose which data to display, ensuring that the dashboard remains relevant and focused on the most critical information.
3. **Real-Time Reporting:** One of the standout features of Salesforce dashboards is their ability to provide real-time data reporting. This immediacy allows organizations to act on current information rather than relying on outdated data, enhancing responsiveness and decision-making.
4. **Diverse Components:** A dashboard can include various components, such as charts, tables, gauges, and metrics, each designed to showcase specific insights. By combining these elements, users can create tailored dashboards that effectively communicate the information relevant to their roles.
5. **Types of Dashboards:** Salesforce offers several types of dashboards, including: Standard Dashboards
6. **Cloud-Based Analytics:** Operating directly from the cloud, Salesforce dashboards enable fast deployment and universal accessibility. This eliminates the need for extensive data centers and allows users to access their dashboards from anywhere, enhancing collaboration and decision-making.

## Task 29: 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.

The screenshot shows a dashboard management interface with a sidebar on the left containing categories like Dashboards, Recent, Folders, and Favorites. The main area displays a table of dashboards with columns for Dashboard Name, Description, Folder, Created By, and Created On. A single dashboard named "data analytics of laptops" is listed.

Dashboards	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	data analytics of laptops	total amount of data in dashboards	total rent amount	Likhitha Sai	8/8/2024, 10:16 pm	

The screenshot shows the same dashboard management interface, but a modal window titled "Create folder" is open over the main content. The modal contains fields for "Folder Label" (containing "total rent amount") and "Folder Unique Name" (containing "totalrentamount"). There are "Cancel" and "Save" buttons at the bottom right of the modal.

## Task 30: Create Dashboard

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

Dashboards

Recent

1 item

Dashboard Name	Description	Folder	Created By	Created On	Subscribed
data analytics of laptops	total amount of data in dashboards	total rent amount	Likitha Sai	8/8/2024, 10:16 pm	

Created by Me

Private Dashboards

All Dashboards

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

javascript:void(0);

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

New Dashboard

Name: data analytics of laptops

Description: total amount of data in dashboards

Folder: total rent amount

Cancel Create

3. Select add component.

LAPTOP RENTALS

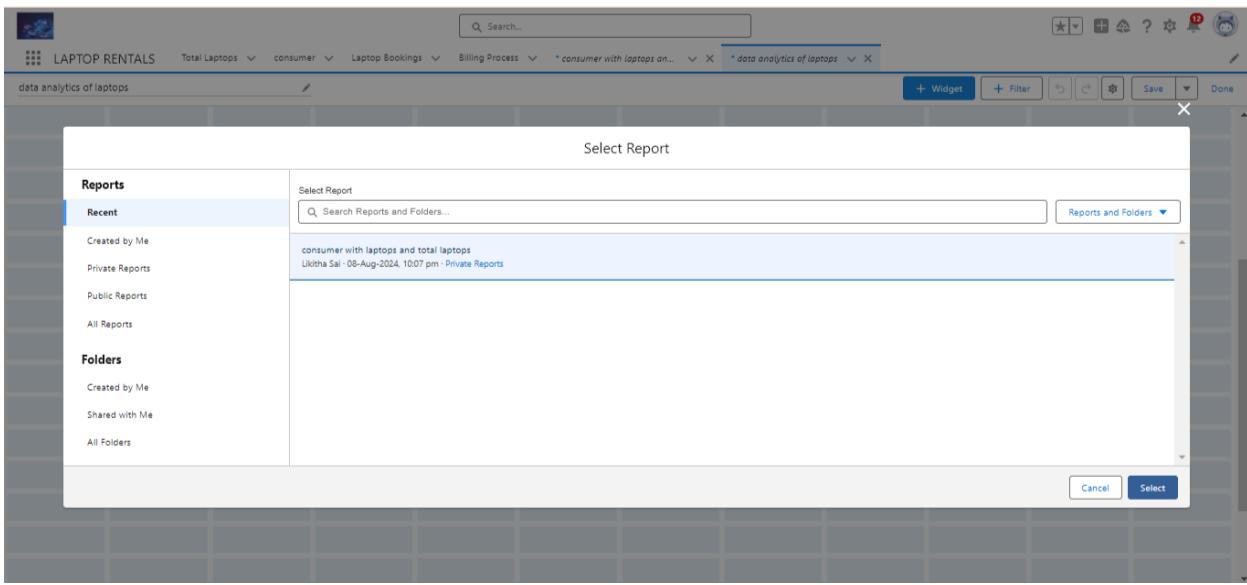
Total Laptops consumer Laptop Bookings Billing Process \* consumer with laptops on... \* data analytics of laptops

+ Widget + Filter Save Done

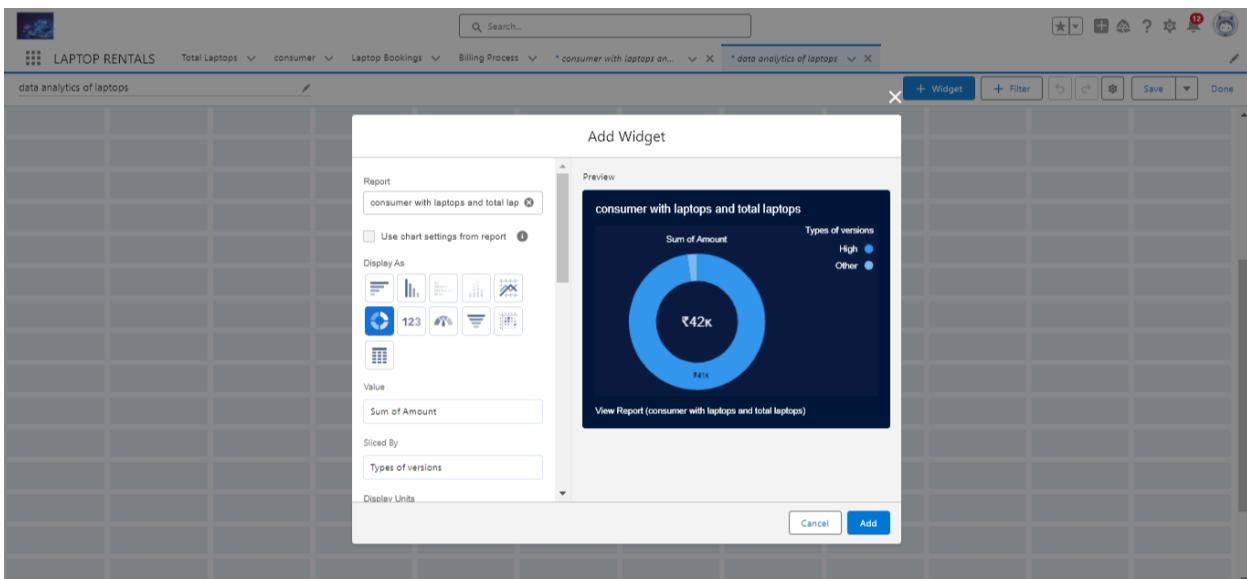
Chart or Table

A Text

Image



4. Select a Report and click on select.



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

**Thank you**