Project Report on

A CRM APPLICATION FOR LAPTOP RENTALS

(DEVELOPER) - (Long-Term)

Milestone – 01: Create Salesforce Org

Goto **developers.salesforce.com/Signup**

Click on sign up.

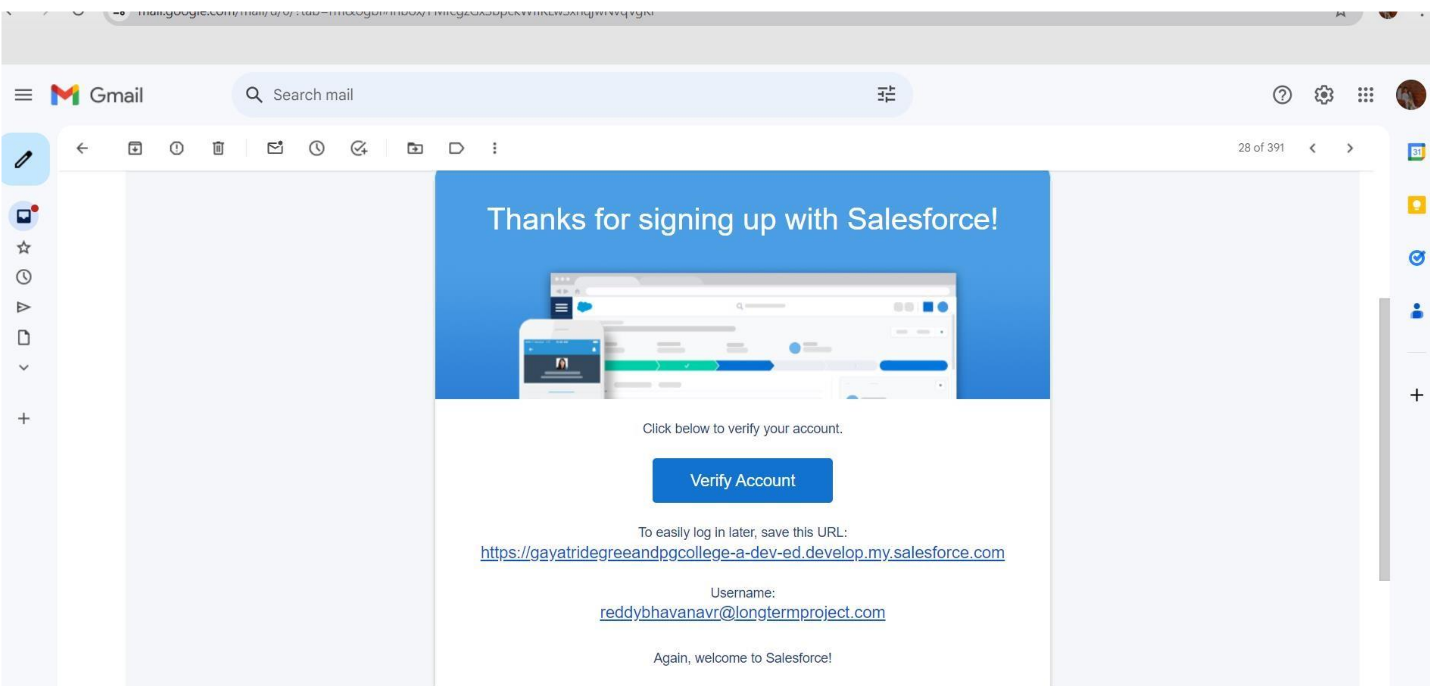
On the sign-up form, enter the following details:

1. First name & Last name – REDDY BHAVANA V R
2. Email –reddybhavanavr@gmail.com
3. Role: **Developer**
4. Company: GAYATRI DEGREE COLLEGE - TIRUPATI
5. County: India
6. Postal Code: 517501
7. Username: **reddybhavanavr@longtermproject.com**

Account Activation

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, as

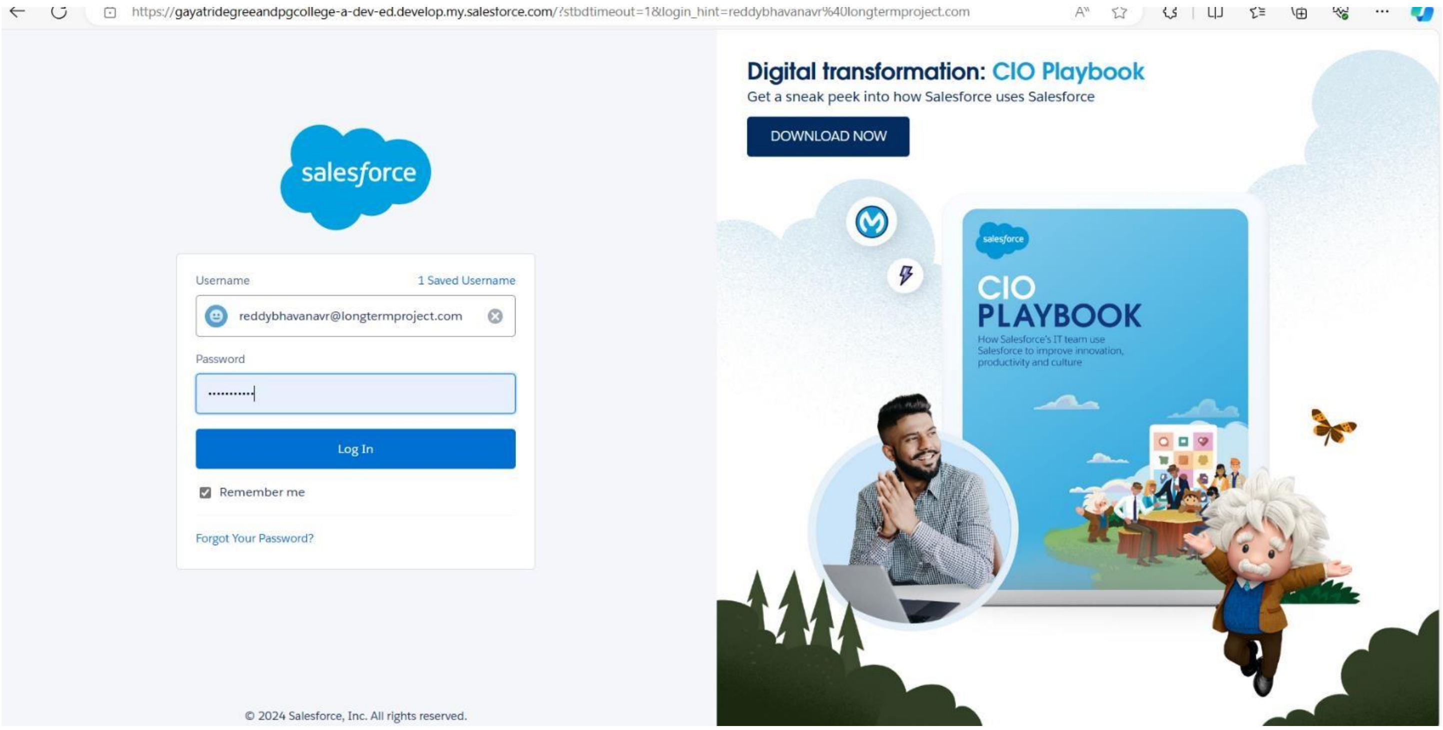


Login to Your Salesforce Account

1. Go to salesforce.com and click on login.

2. Enter the username and password that you just created.

3. After login this is the home page which you will see.



Milestone – 02: Object Creation–

Total Laptops

Click on the gear icon and then select Setup.

1. Click on the object manager tab just beside the home tab.

2. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.

3. On the Custom Object Definition page, create the object as follows:

4. Label: **Total Laptops**

5. Plural Label: **Total Laptops**

6. Record Name: **Total Laptops**

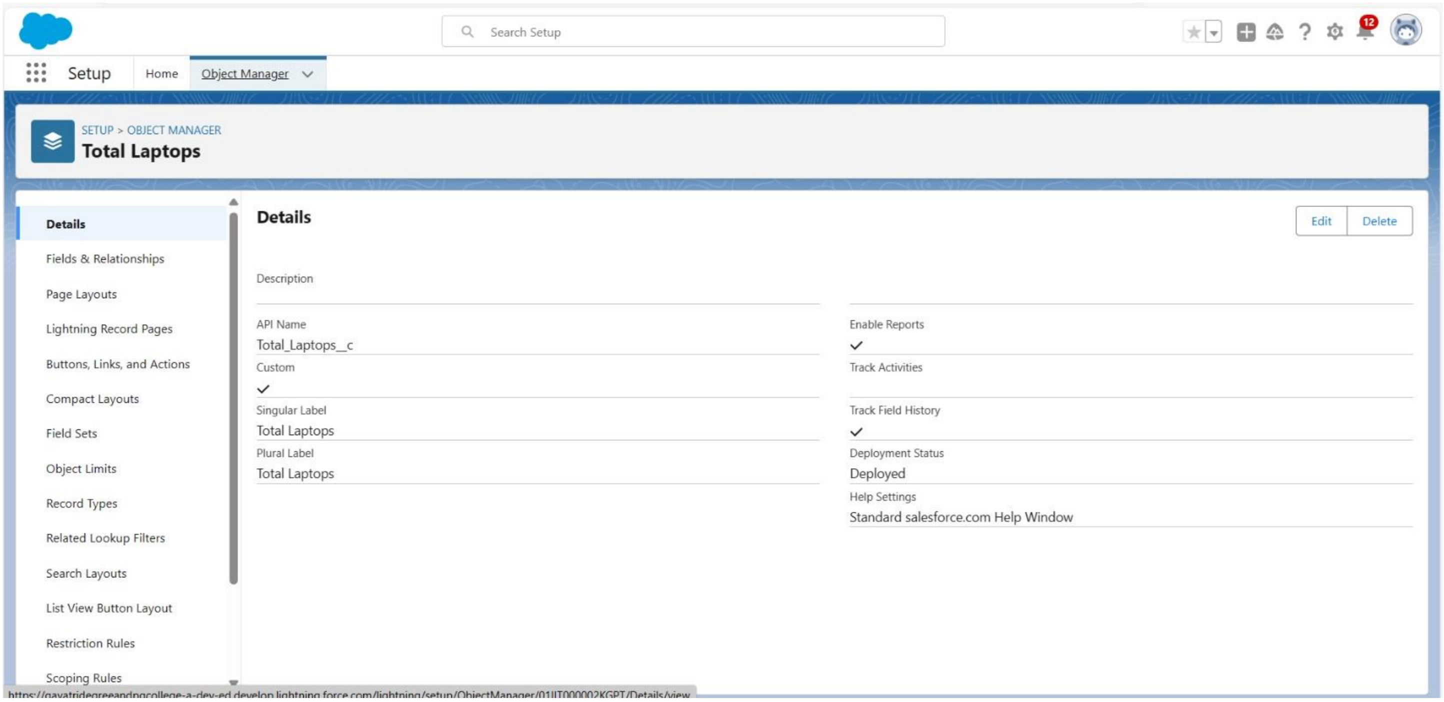
7. Data Type: **Text**

8. Check the Allow Reports

9. Check the Allow Search

10. Check Track Field history

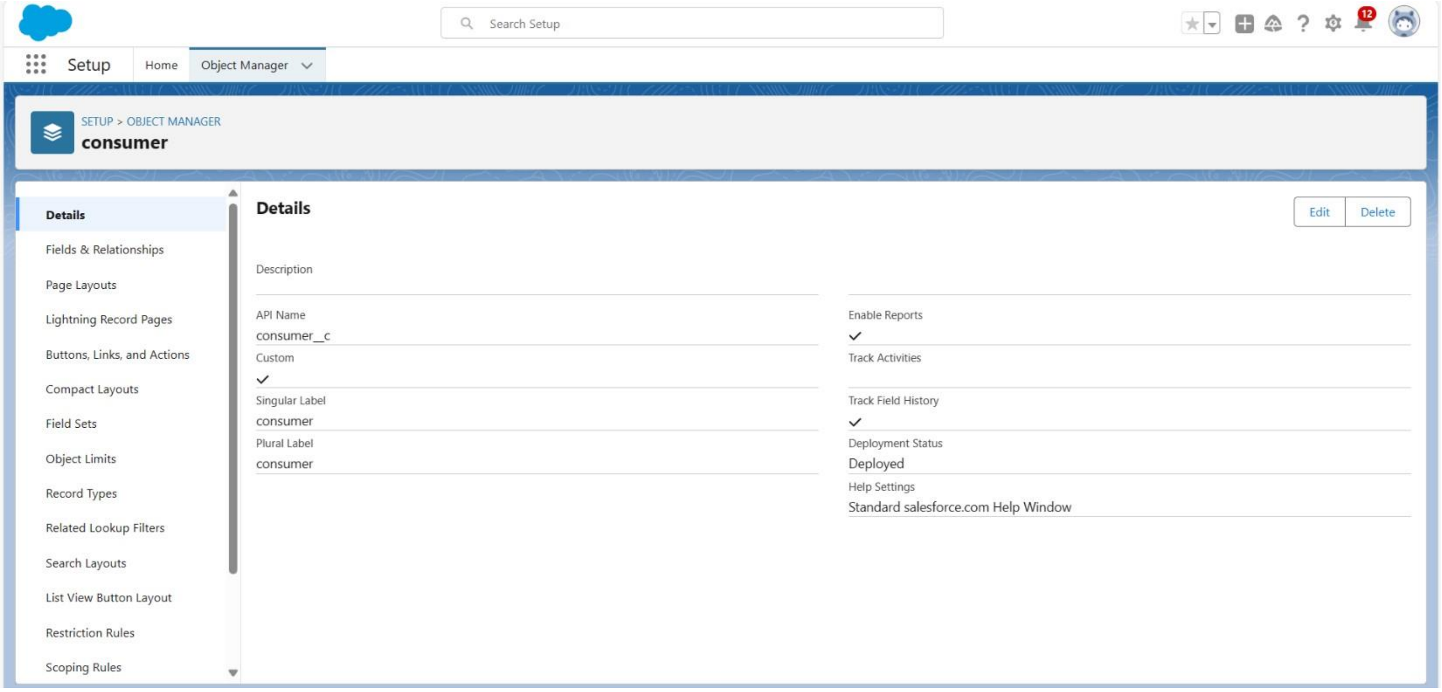
11. Click Save.



Object- consumer

Click on the gear icon and then select Setup.

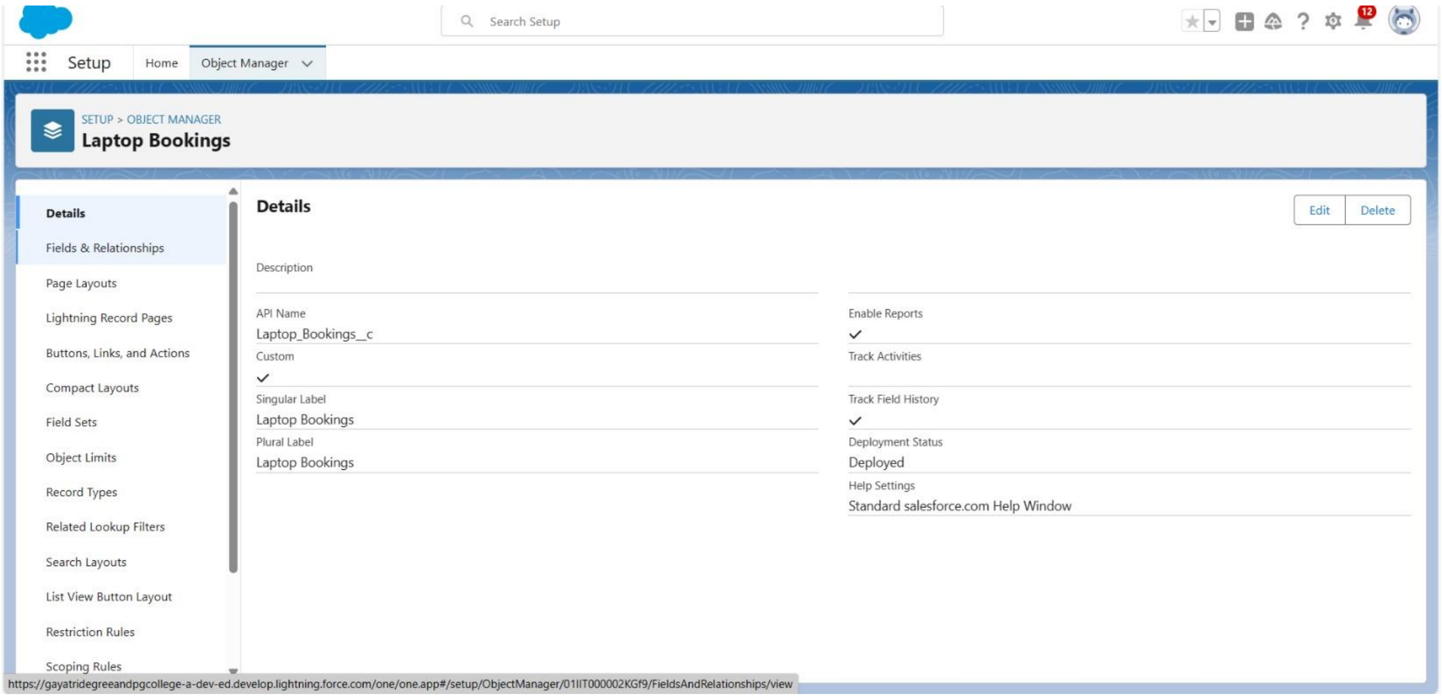
1. Click on the object manager tab just beside the home tab.
2. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
3. On the Custom Object Definition page, create the object as follows:
4. Lable: **consumer**
5. Plural Lable: **consumer**
6. Record Name -**consumer_name**
7. Data Type – **Name**
8. Click on Allow reports, Allow search and Track Field History
9. Click Save.



Object - Laptop Bookings

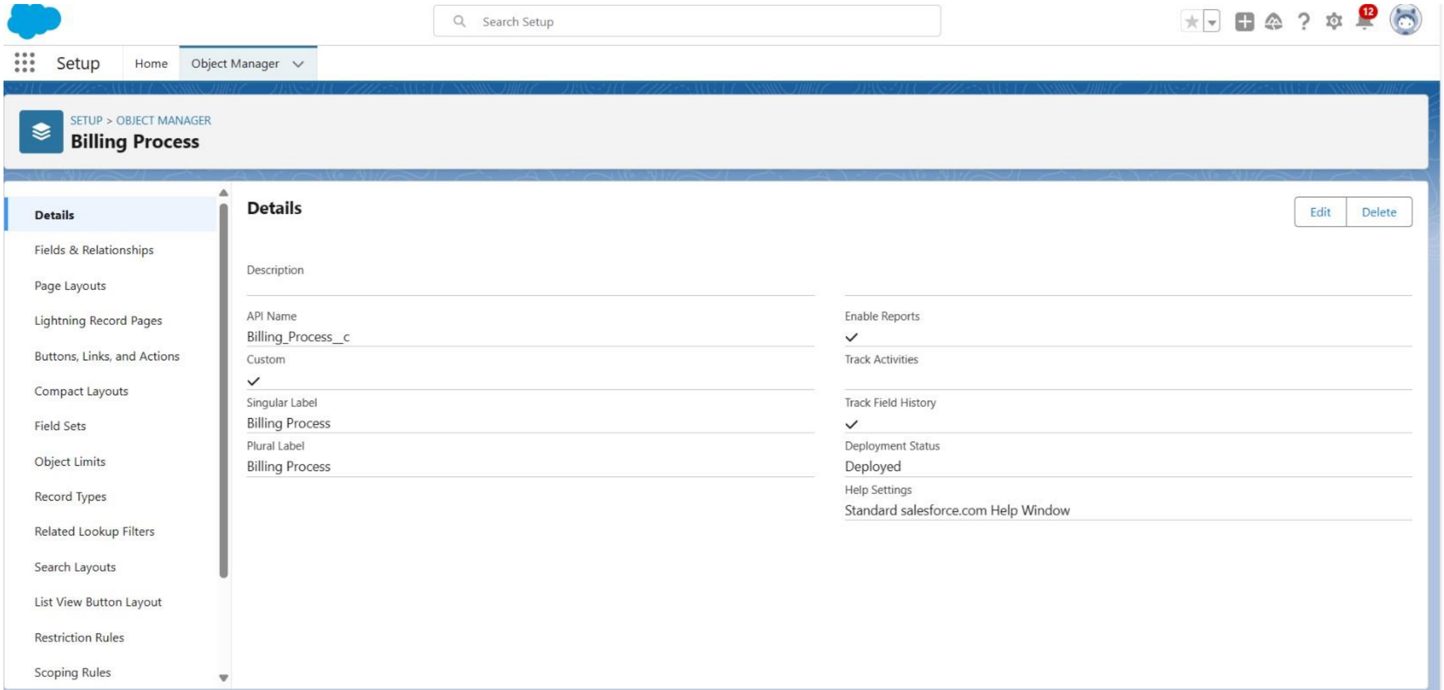
Click on the gear icon and then select
Setup.

1. Click on the object manager tab just beside the home tab.
2. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
3. On the Custom Object Definition page, create the object as follows:
4. Label: **Laptop Bookings**
5. Plural label name- **Laptop Bookings**
6. Record Name - **Laptop Bookings**
7. Data Type – **Name**
8. Click on Allow reports, Allow search and Track Field History
9. Click Save.



Object - Billing Process

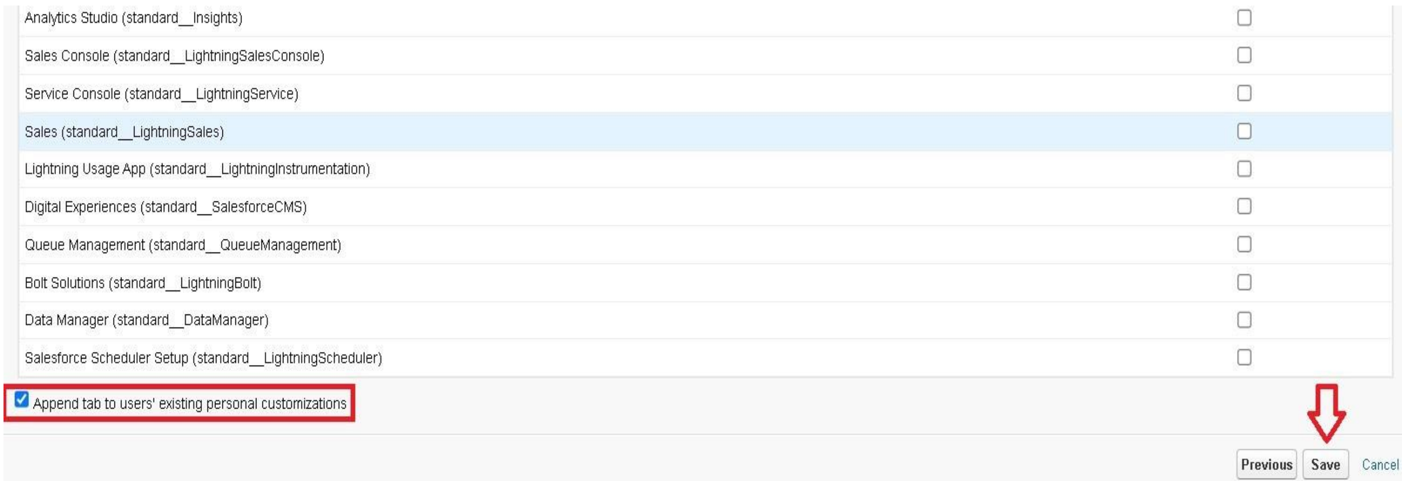
1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Dropdownclick on that and select Custom Object.
4. On the Custom Object Definition page, create the object as follows:
5. label name- Billing Process
6. Plural label name- Billing Process
7. Record Name - Billing ProcessName
8. Data Type – Name
9. Click on Allow Reports, Allow Search and Track Field History
10. Click Save.

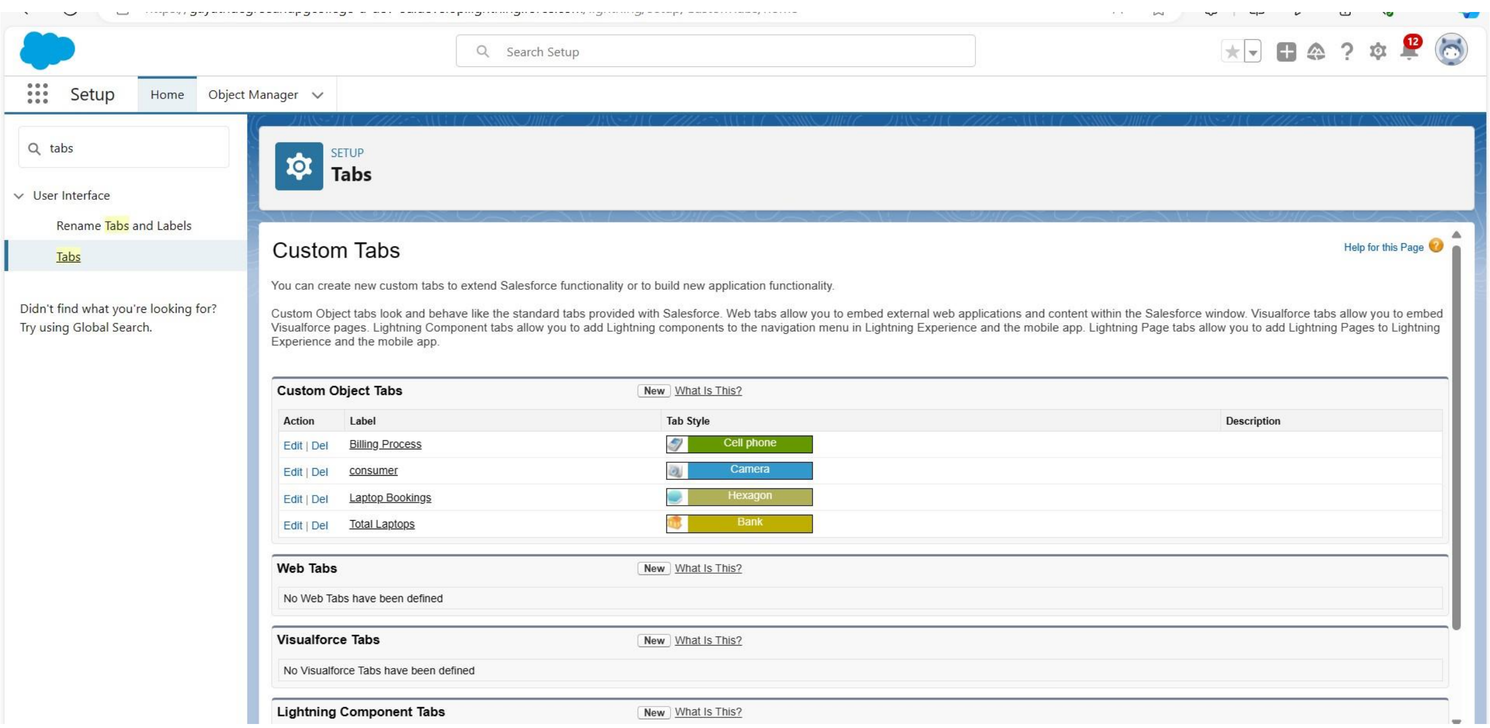

Search Setup
12
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Billing Process
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Details
Edit
Delete
Description
API Name
Billing_Process__c
Custom
Singular Label
Billing Process
Plural Label
Billing Process
Enable Reports
Track Activities
Track Field History
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window

Milestone – 03: Creating A Custom Tab Now create a custom tab.

Click the Home tab.

1. Enter Tabs in Quick Find and select Tabs.
2. Under Custom Object Tabs, click New.
3. For Object, select Total Laptops.
4. For Tab Style, select any icon.
5. Next (Add to profiles page) keep it as default - Next (Add to Custom App) uncheck the include tab .
6. Make sure that the Append tab to users' existing personal customizations is checked.





Creating Remaining Tabs

1. Now create the Tabs for the remaining Objects, they are “consumer, Laptop Bookings, Billing process”.

Milestone – 04: **Lightning App**

LAPTOP RENTALS?

1. From Setup, enter App Manager in the Quick Find and select App Manager.

2. Click New Lightning App.

3. Fill the app Name as **LAPTOP RENTALS?**

4. Upload a photo that related to App

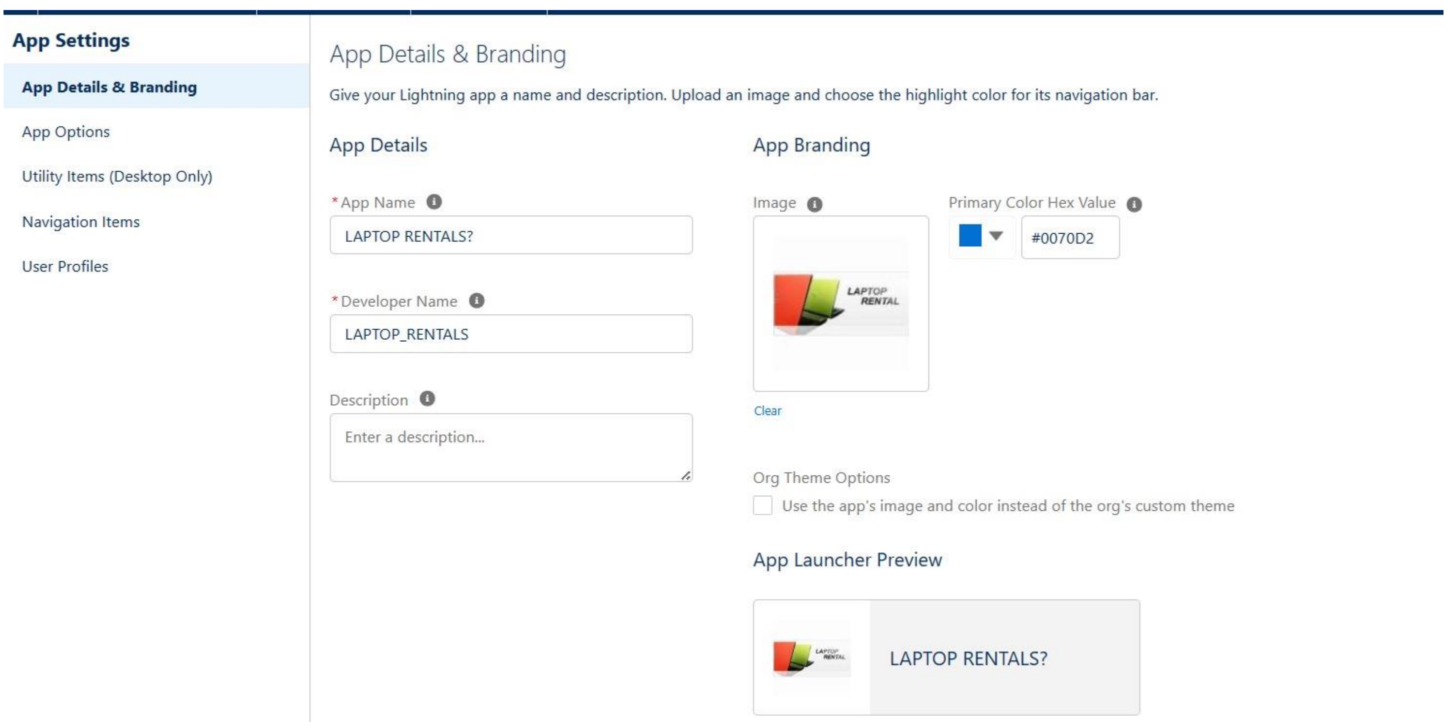
5. Under App Options, leave the default selections and click next.

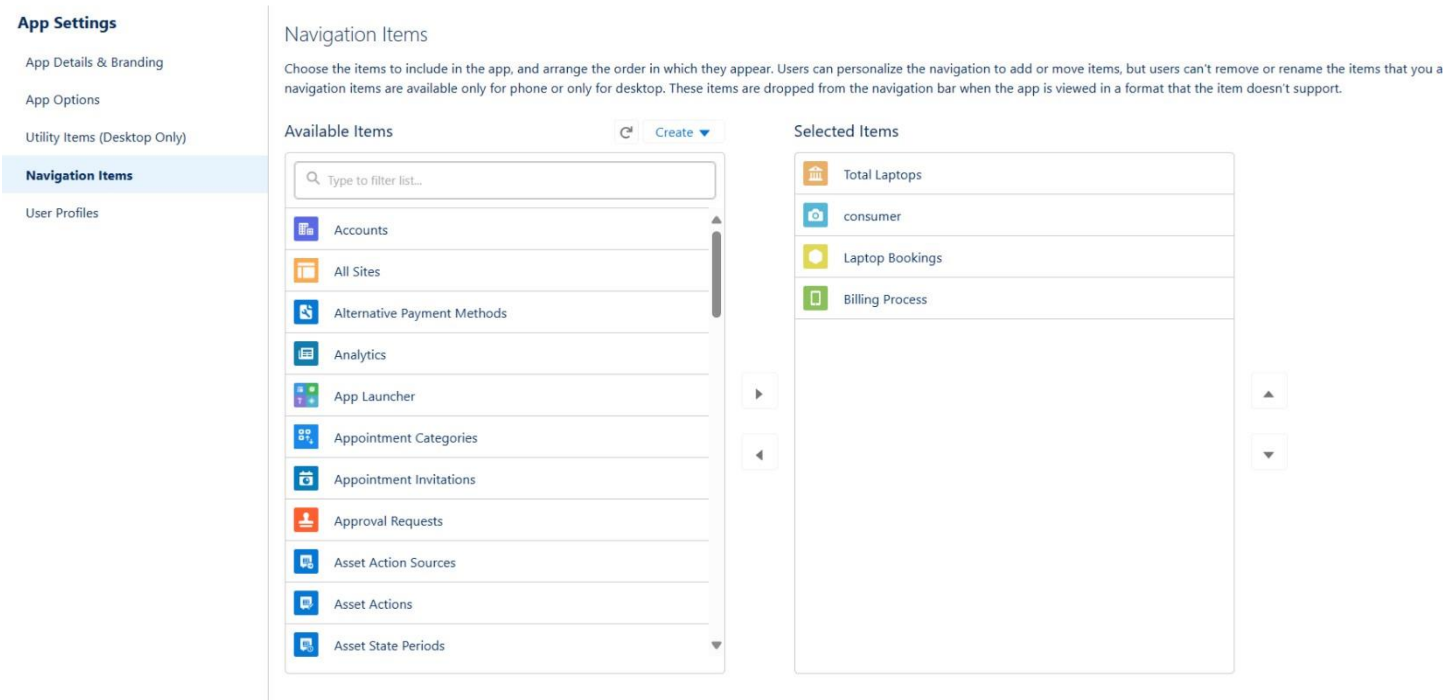
6. Under Utility Items, leave as is and click Next.

7. From Available Items, select **Total Laptops, Consumer, Laptop Booking, Billing Process** and move them to Selected Items.

8. Click Next.

From Available Profiles, select System Administrator and move it to Selected Profiles. Click Save & Finish.





Milestone – 05: Fields

Creating the field in “Consumer” Object

1.Click the gear icon and select Setup. This launches Setup in a new tab.

2. Click the Object Manager tab next to Home.

3. Search for consumer object click on consumer

4. Select Fields & Relationships from the left navigation

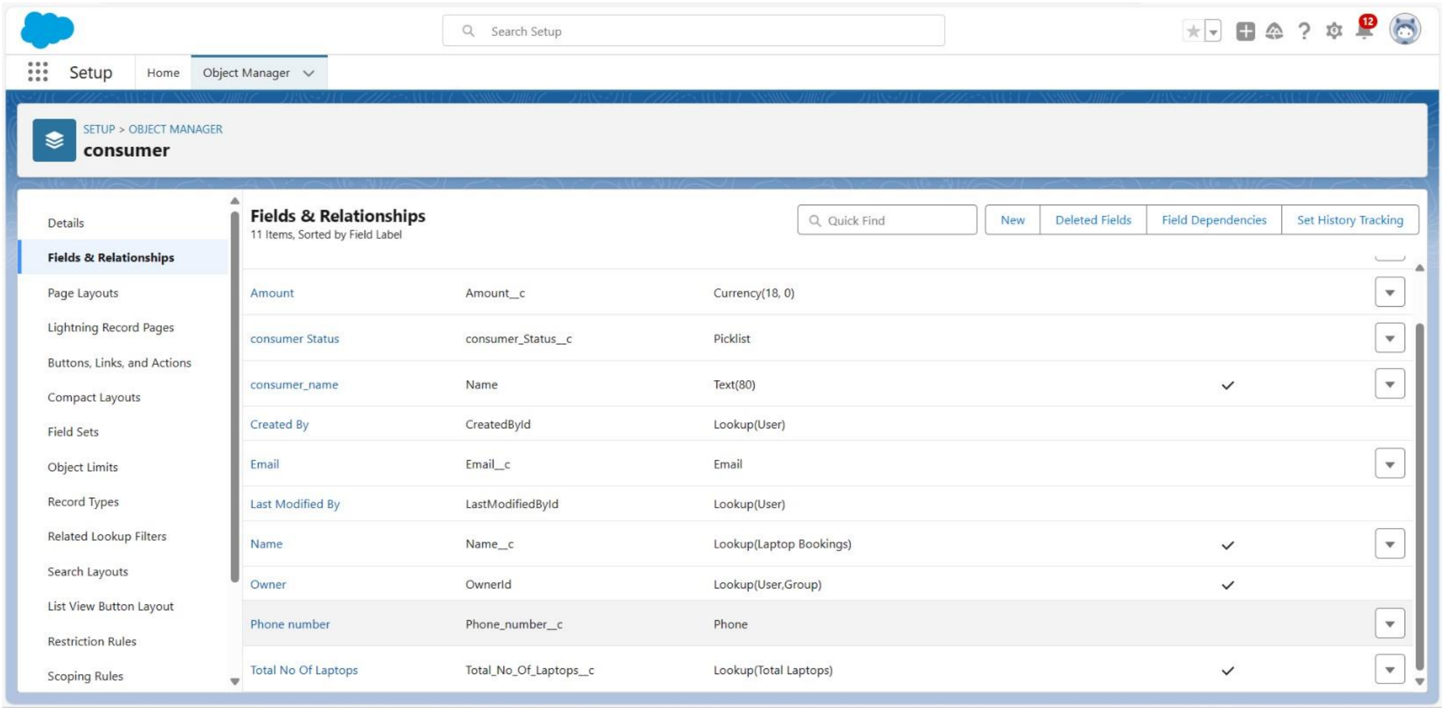
5. Click New

6. Select the Phone as the Data Type, click next.

7. For Field Label, enter Phone Number

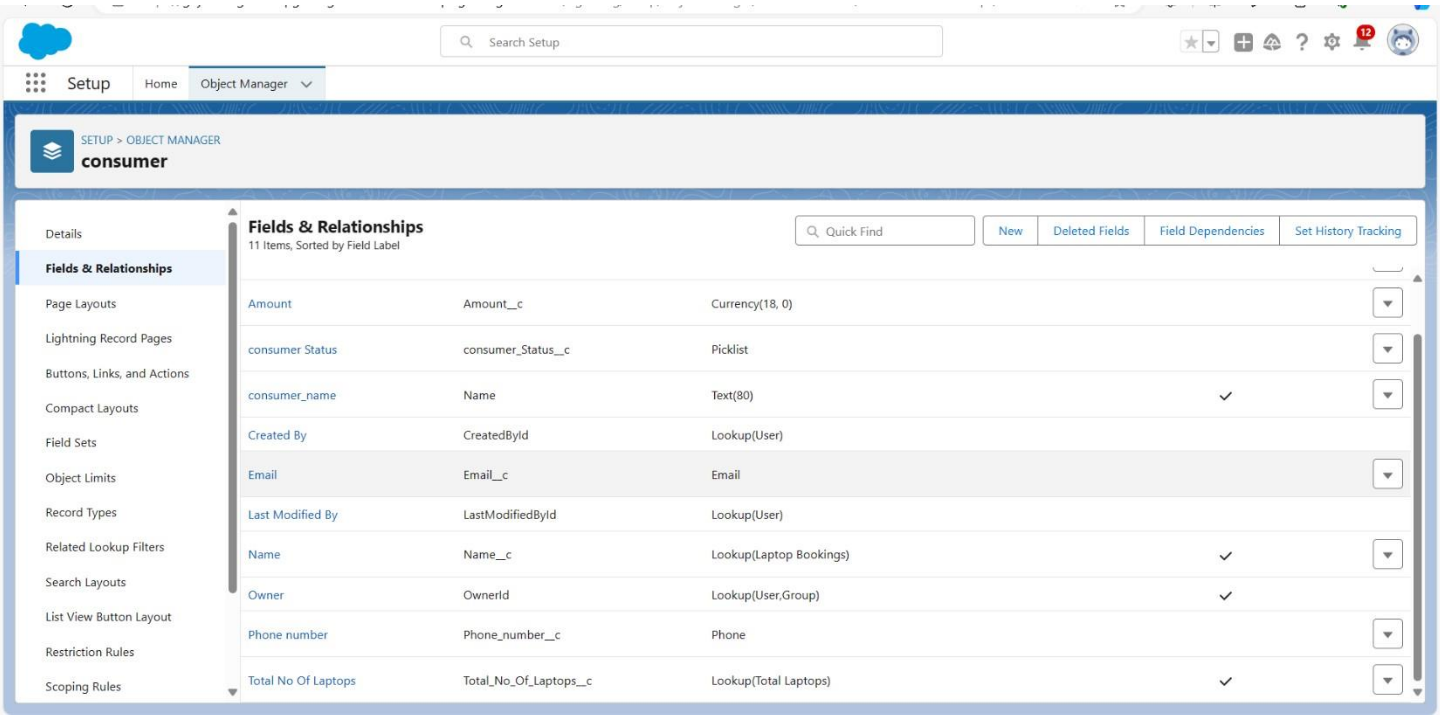
8. Click the required option checkbox

9. Click Next, Next, then Save & New.



Now Let's create a another field on consumer object

1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select consumer.
4. Select Fields & Relationships from the left navigation
5. Click New
6. Select the Email as the Data Type, then click Next.
7. For Field Label enter Email.
8. Click Next, Next, then Save & New.



Let’s create another field on Consumer object

1. Click the gear icon and select Setup. This launches Setup in a new tab.

2. Click the Object Manager tab next to Home.

3. Select Consumer.

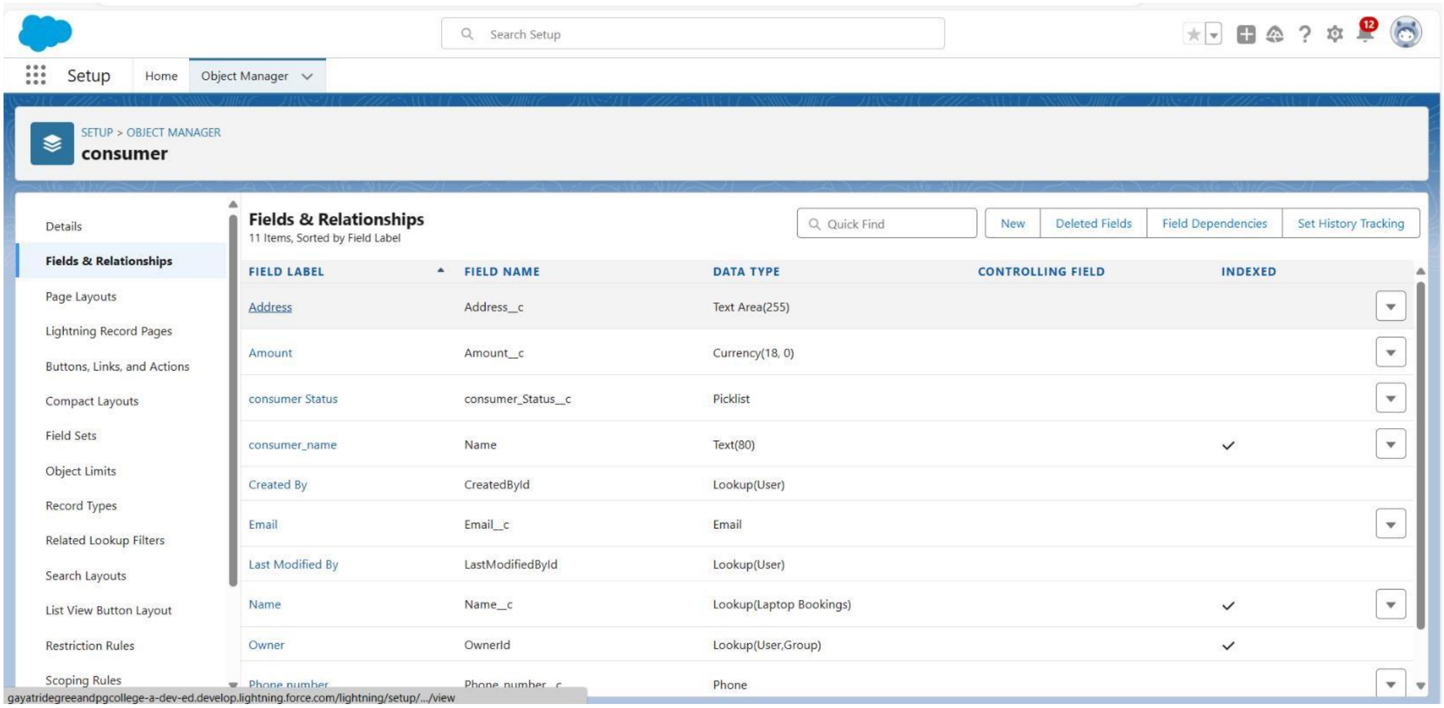
4. Select Fields & Relationships from the left navigation

4. Click New & select data type as Text Area, click Next

6. For Field Label enter Adress

7. Select Required checkbox

8. Click Next, Next, then Save & New.



Now Let's create another field in consumer object

1. Click the gear icon and select Setup. This launches Setup in a new tab.

2. Click the Object Manager tab next to Home.

3. Select Consumer.

4. Select Fields & Relationships from the left navigation.

5. Click New

6. Select the Picklist as the Data Type, then click Next.

7. Give field label Consumer Status

8. Value: Select Enter values with each values separated by new line

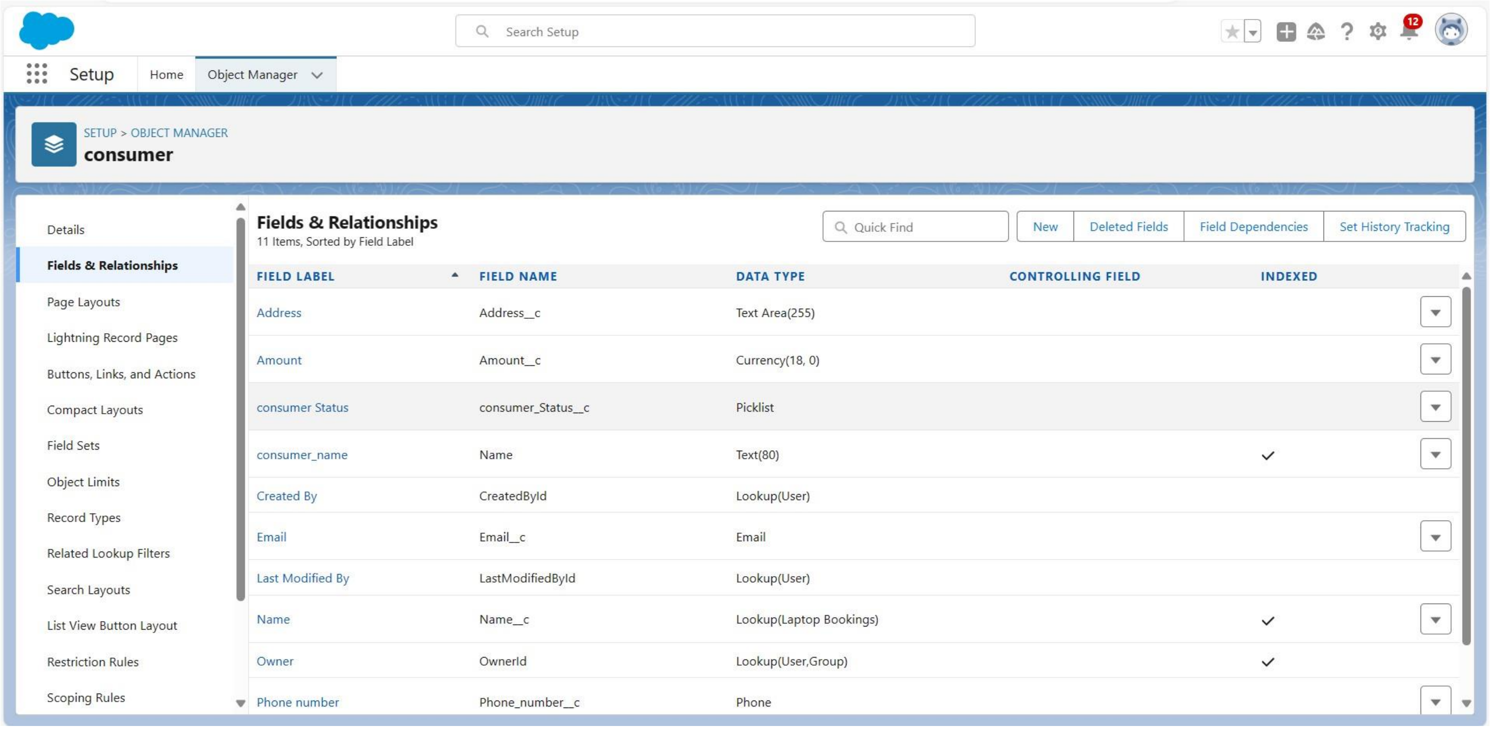
   1.Student

   2.Employee

   3.Others

9. Select Required

10.Click Next, Next, then Save.



Creating The Field In Laptops Bookings Object

1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Laptop Bookings.
4. Select Fields & Relationships from the left navigation
5. Click New
6. Select the Picklist as the Data Type, then click Next.
7. Picklist values are:1.Dell 2. Acer 3.Hp 4.Mac
8. Select required checkbox
9. Click Next, Next, then Save & New.

To Create a Fields & Relationship to an Laptop Booking Object

1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.

3. Select Laptop Bookings.

4. Select Fields & Relationships from the left navigation

5. Click New

6. Select the Picklist as the Data Type, then click Next.

7. Picklist values are: 1.core i3   2. Core i5   3. Core i7

8. Select required checkbox

9. Click Next, Next, then Save & New

To Create A Fields & Relationship To An Laptop Booking Object

1. Click the gear icon and select Setup. This launches Setup in a new tab.

2. Click the Object Manager tab next to Home.

3. Select Laptop Booking.

4. Select Fields & Relationships from the left navigation

5. click field dependency and next

6. 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.

7. Click save.

To Create A Fields & Relationship To An Laptop Booking Object

1. Click the gear icon and select Setup. This launches Setup in a new tab.

2. Click the Object Manager tab next to Home.

3. Select Laptop Bookings.

4. Select Fields & Relationships from the left navigation

5. Click New

6. Select the Lookup Relationship as the Data Type, then click Next.

7. Click on the Related to drop down and Select the “consumer” object and click on Next
8. Fill the Above as following:

- Change the Field Label: Name • Field Name: It’s gets auto generated

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

To create fields in an object:

1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Laptop Bookings.
4. Select Fields & Relationships from the left navigation
5. Click New
6. Select the Currency as the Data Type, then click Next.
7. Field Label: Amount
8. Length: (18,0)
9. Field Name: It’s gets auto generated
10. Click on Next - Next - Save and new

To Create A Fields & Relationship To An Laptop Booking Object

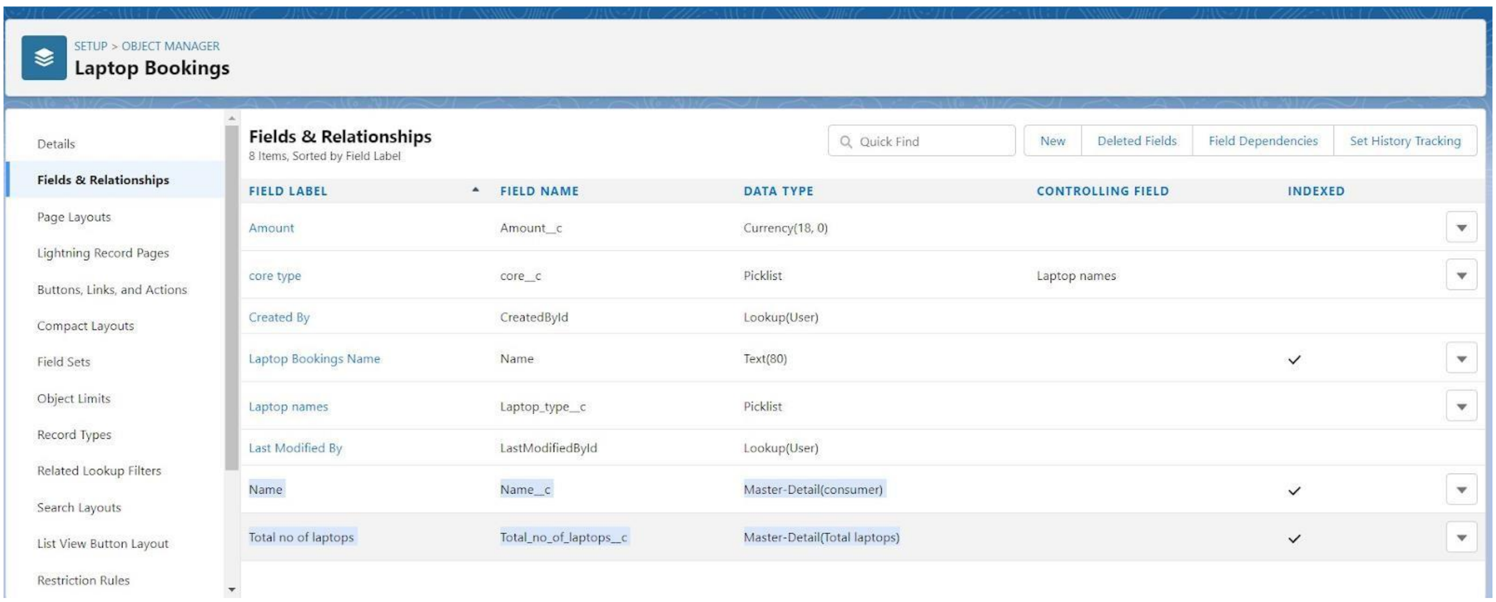
1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Laptop Bookings.
4. Select Fields & Relationships from the left navigation
5. Click New
6. Select the Lookup Relationship as the Data Type, then click Next.
7. Click on the Related to drop down and Select the “Total Laptops” object and click on Next
8. 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.

To create fields in an object:

1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Laptop Bookings.
4. Select Fields & Relationships from the left navigation
5. Click New
6. Select the Email as the Data Type, then click Next
7. Field Lable: Email
8. Click on next and save it

NOTE:- 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.

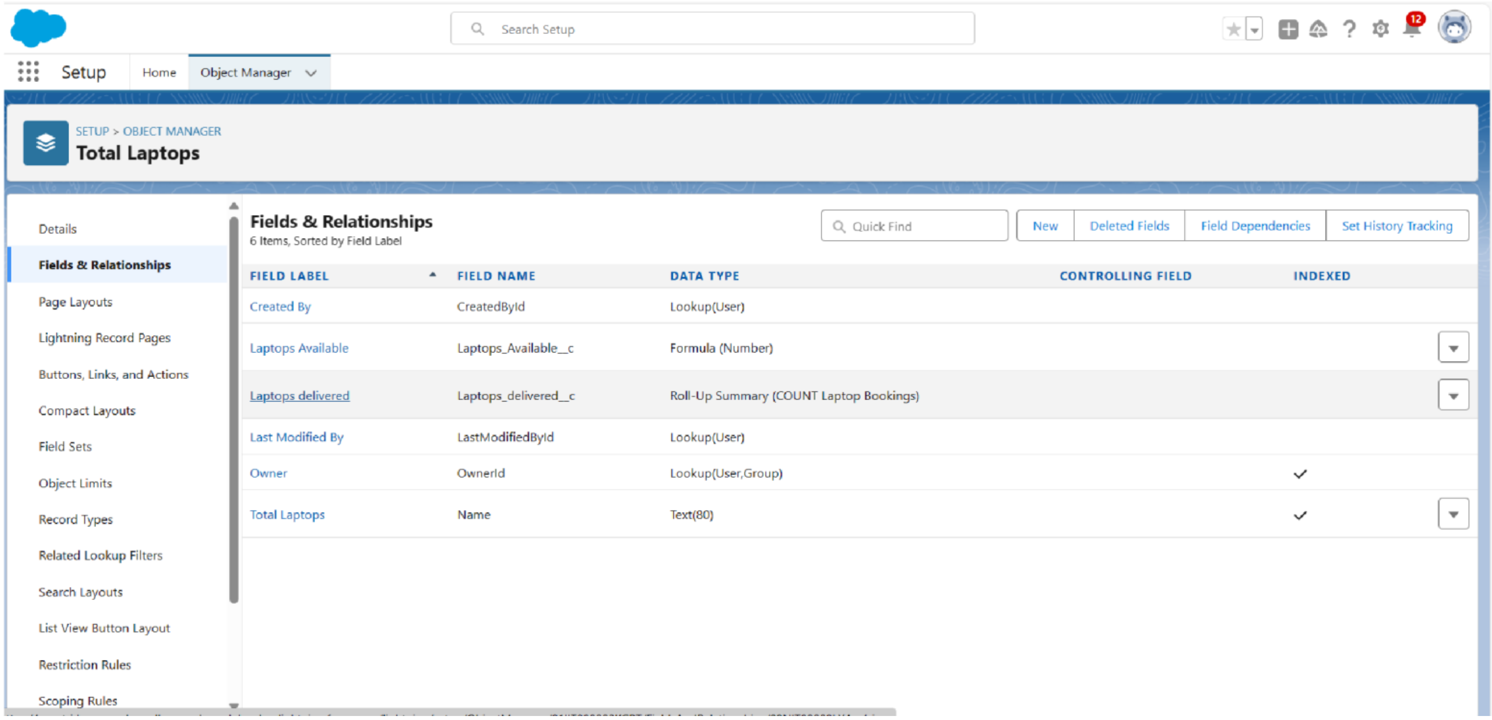


To Create a Rollup Summary Field in "Total Laptops Object

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
4. Select Data type as a "Roll-up Summary" and Click on Next
   - Fill the Above as following:
   - Field Label: Laptops delivered
   - Field Name: It's gets auto generated
   - Click on Next
5. Select the Laptop Bookings in the Summarized Object
6. Select the count Radio button in the select Roll-up Type

7. Click on Next,Next and Save.

To create fields in an object:



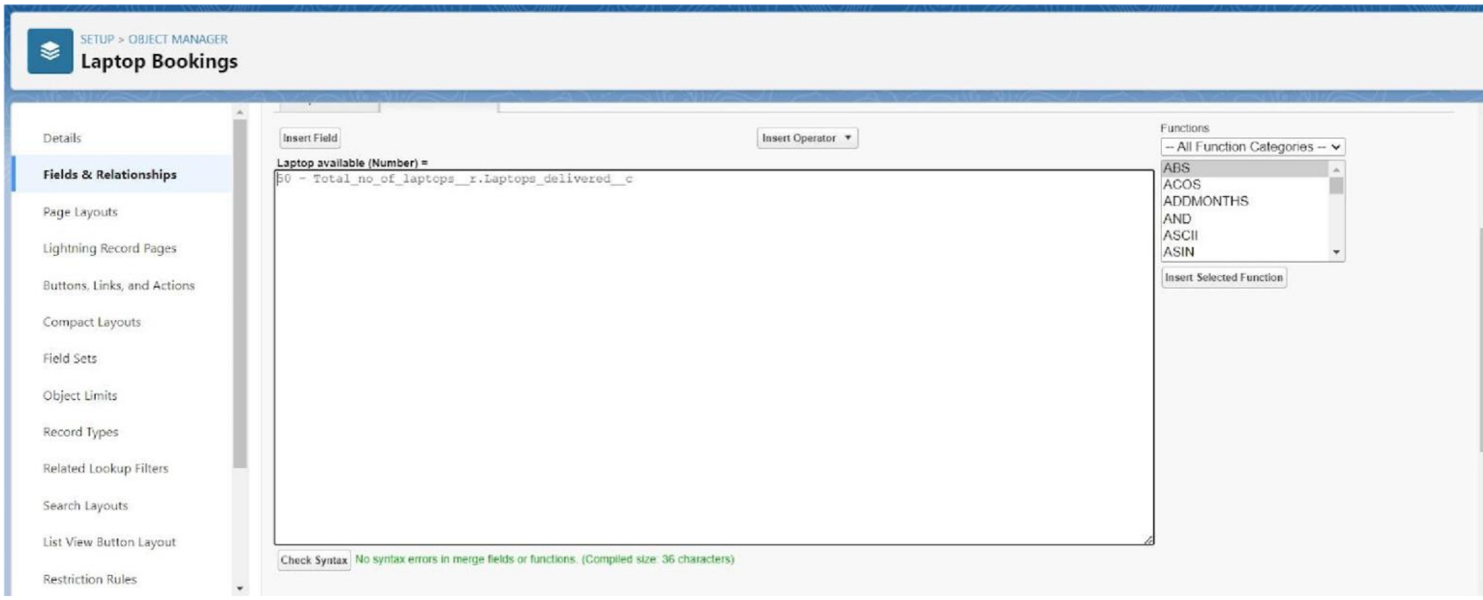
1. Go to setup - click on Object Manager - type object name(Laptop Booking) in the search bar - click on the object.
2. Now click on “Fields & Relationships” - New 3. Select Data type as a “Formula” and Click on Next

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

To create fields in an object:

1. Click the Object Manager tab next to Home.

2. Select Laptop Bookings.



3. Select Fields & Relationships from the left navigation

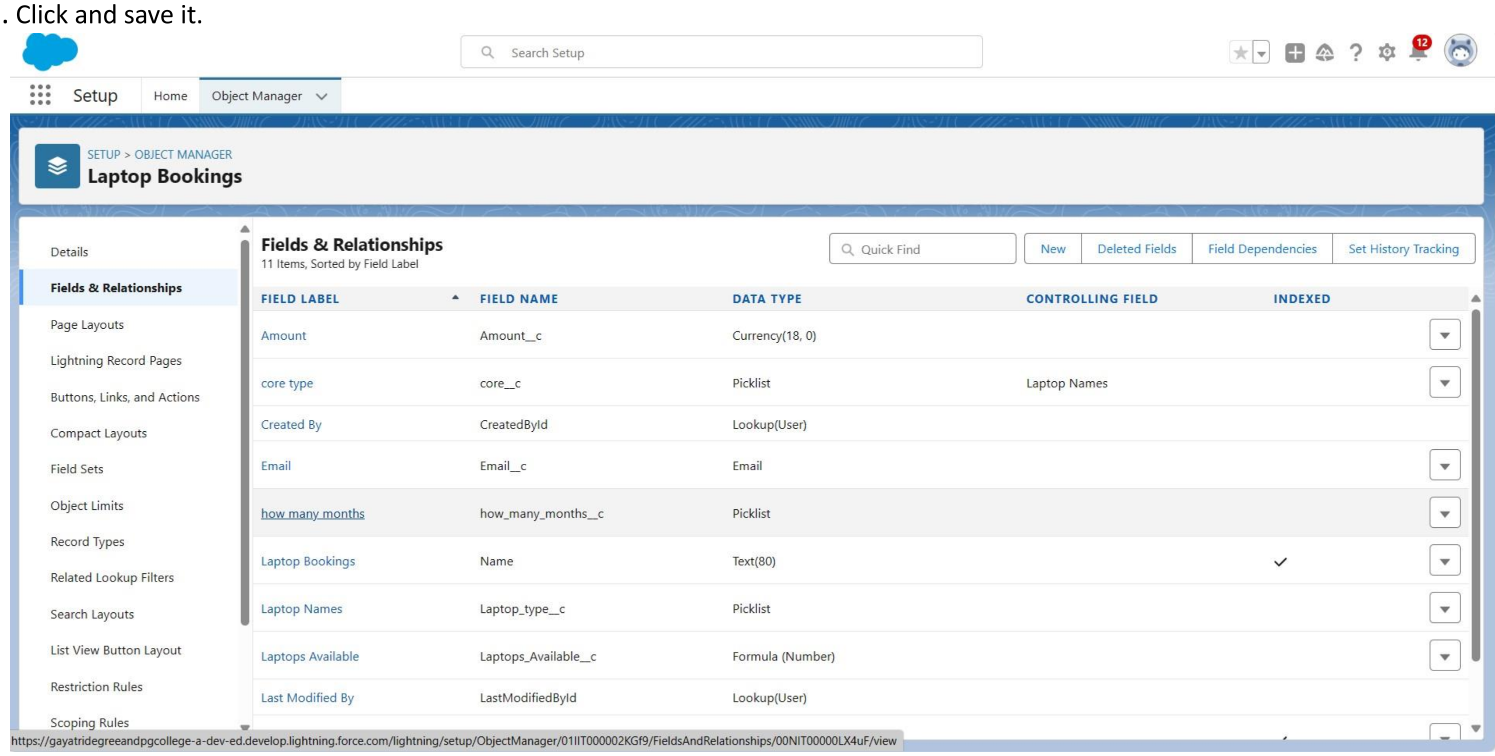
4. Click New

5. Select the Picklist as the Data Type, then click Next.

6. Field Label: how many months

7. Picklist values are 1.2.3.4.5

8. Click and save it.



Creation Of Fields & Relationship For Billing Process Object

1. Click the gear icon and select Setup. This launches Setup in a new tab.

2. Click the Object Manager tab next to Home.
3. Select Billing Process.
4. Select Fields & Relationships from the left navigation
5. Click New
6. Select Data Type as a “Master-detail Relationship”
7. Click on Next
8. Click on the Related to drop down and Select the consumer object and click on Next
9. Fill the Above as following:

- Change the Field Label: Name • Field Name :It’s gets auto generated
- Click on Next - Next - Save and new.

To create another field on object:

1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Billing Process.
4. Select Fields & Relationships from the left navigation
5. Click New
6. Select Data Type as a “Lookup Relationship” 7. Click on Next
8. Click on the Related to drop down and Select the Laptop Booking object and click on Next
9. 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.

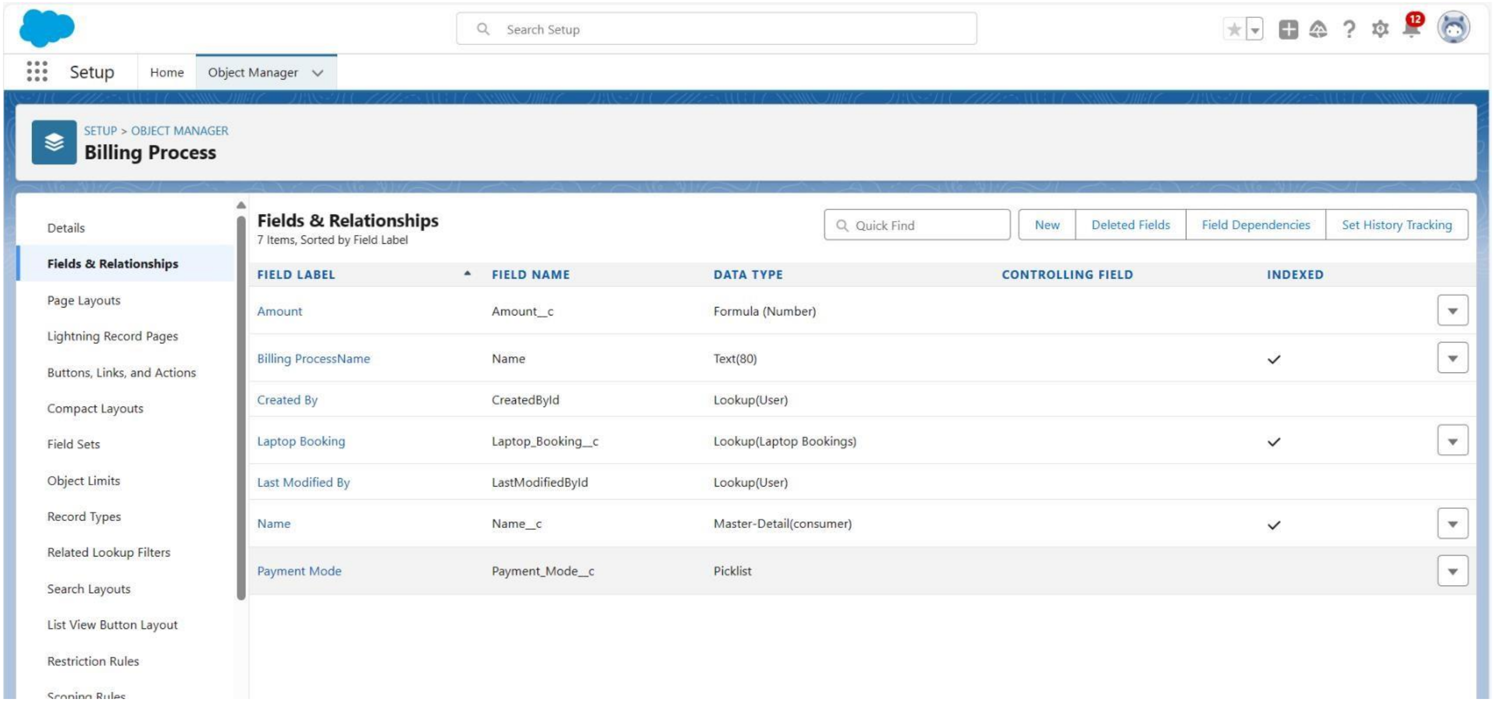
To create another field on object:

1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Billing Process.
4. Select Fields & Relationships from the left navigation 5. Click New
6. Select Data Type as a “Picklist”
7. Click on Next
8. 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

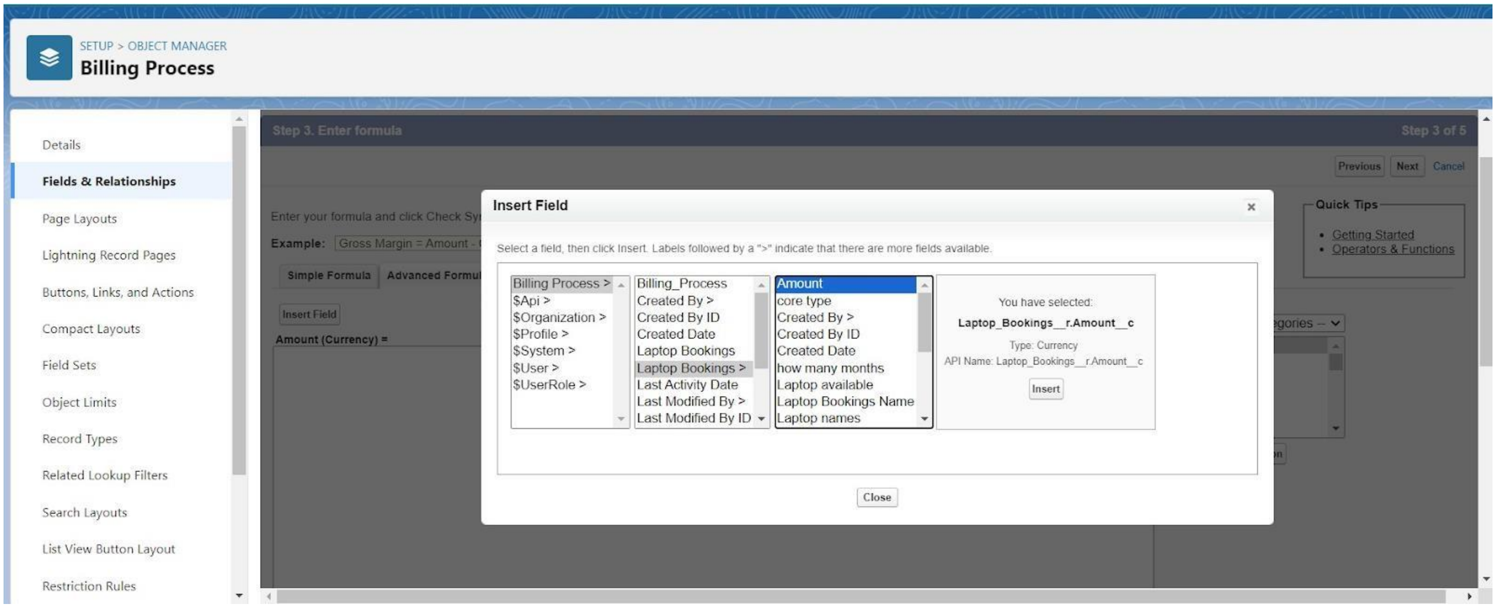
8. Paytm

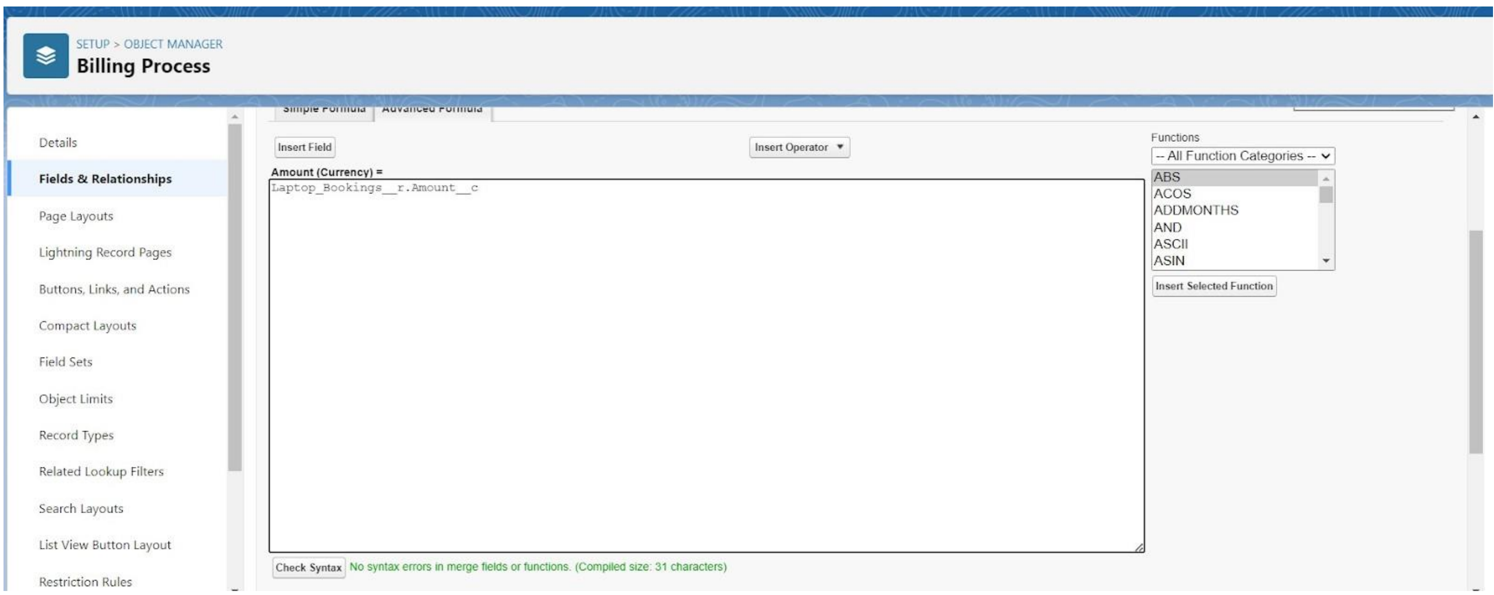
- Select required
- Click on Next - Next - Save and new.



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

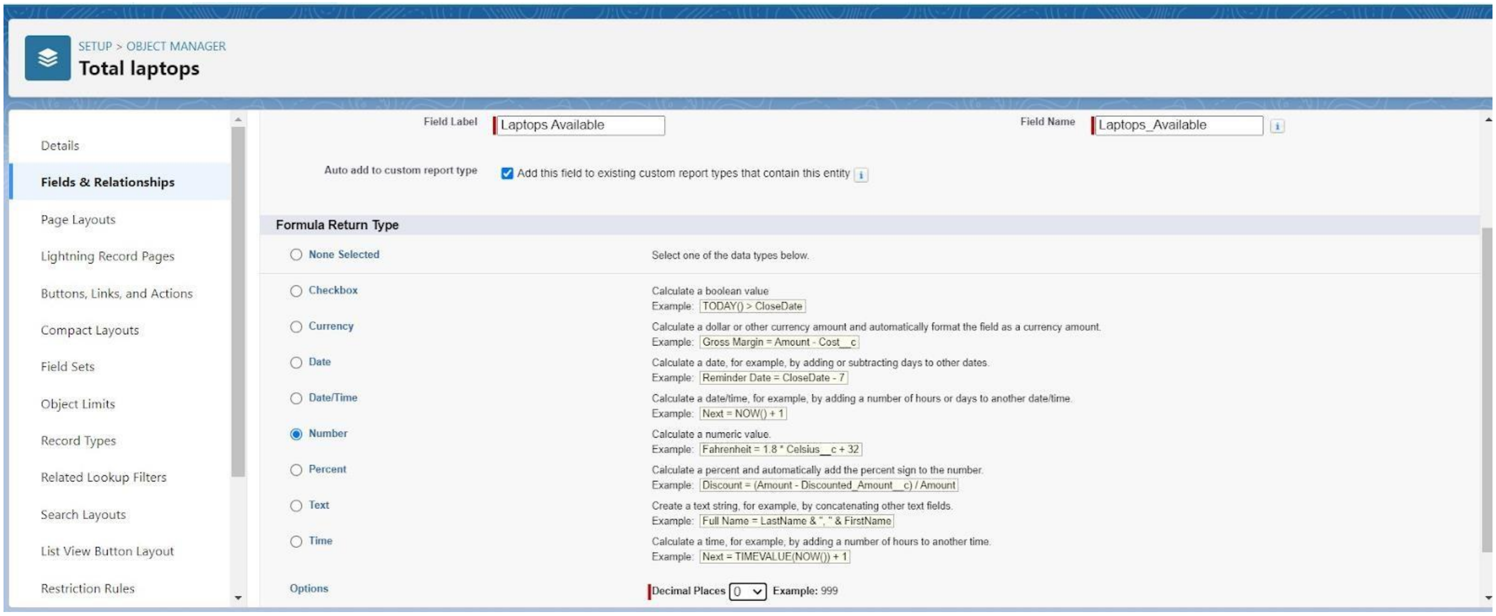




Click on Next - Next - Save and new.

Creating The Field In Total Laptops Object:

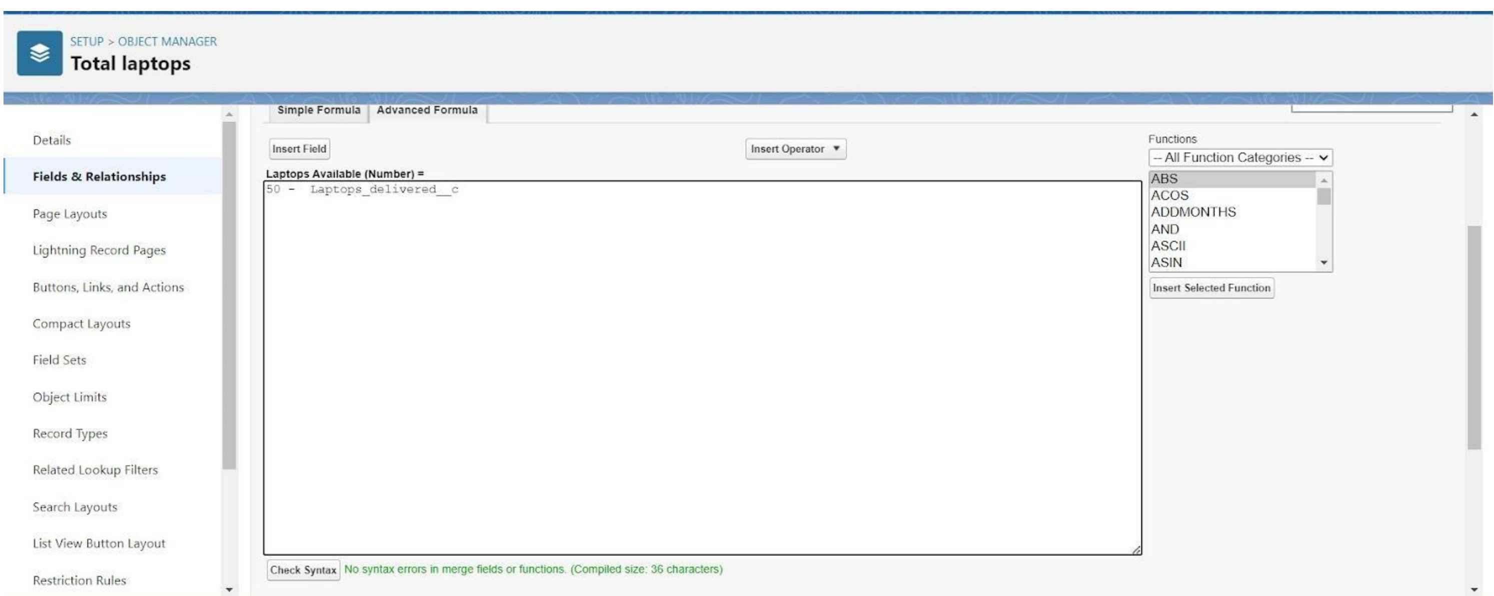
1. Go to setup - click on Object Manager - type object name(Total Laptops) in search bar - click on the object.
2. Now click on “Fields & Relationships” - New 3. Select Data type as a “Formula” and Click on Next
4. Fill the Above as following:
5. Field Label: Laptops Available
6. Field Name : It’s gets auto generated
7. Select the Formula Return Type as “Number”



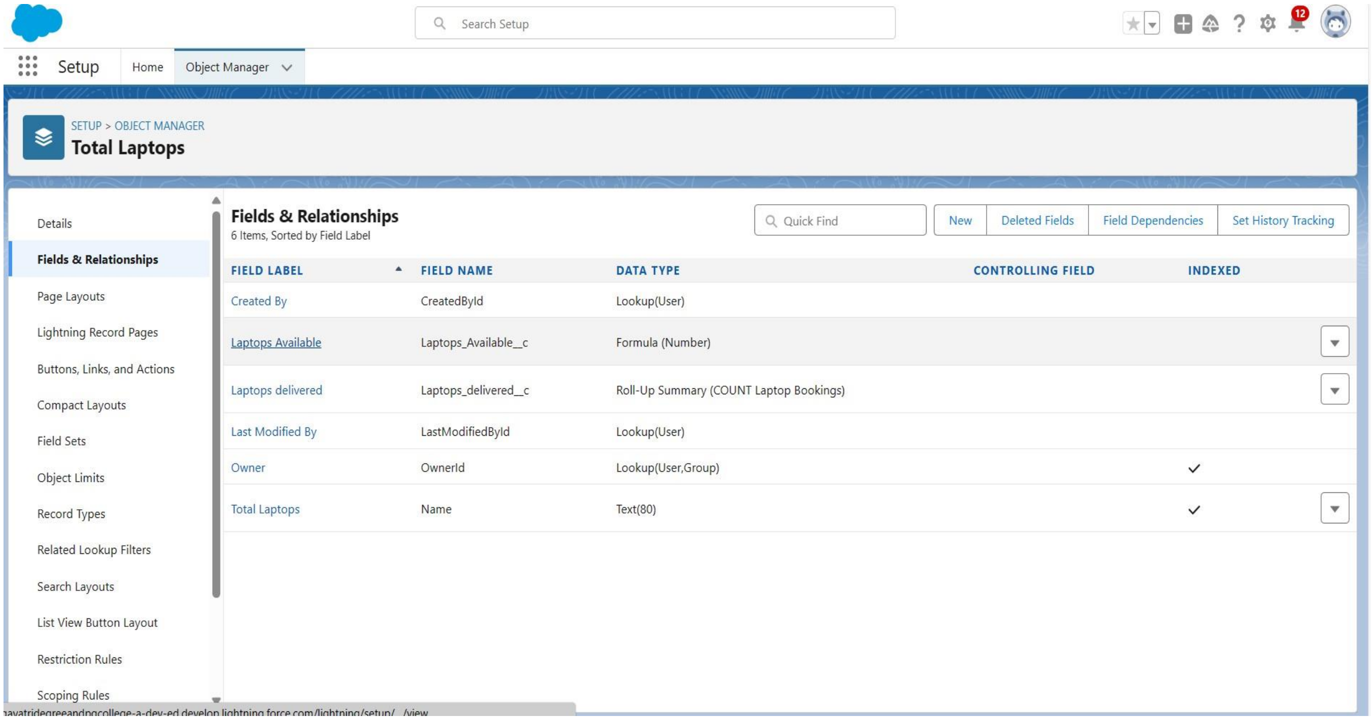
8. Select the Decimal places as "0" and Click on Next

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

1. Click on the Advanced
2. Formula " 50 - Laptops_delivered__c " and Check Syntax



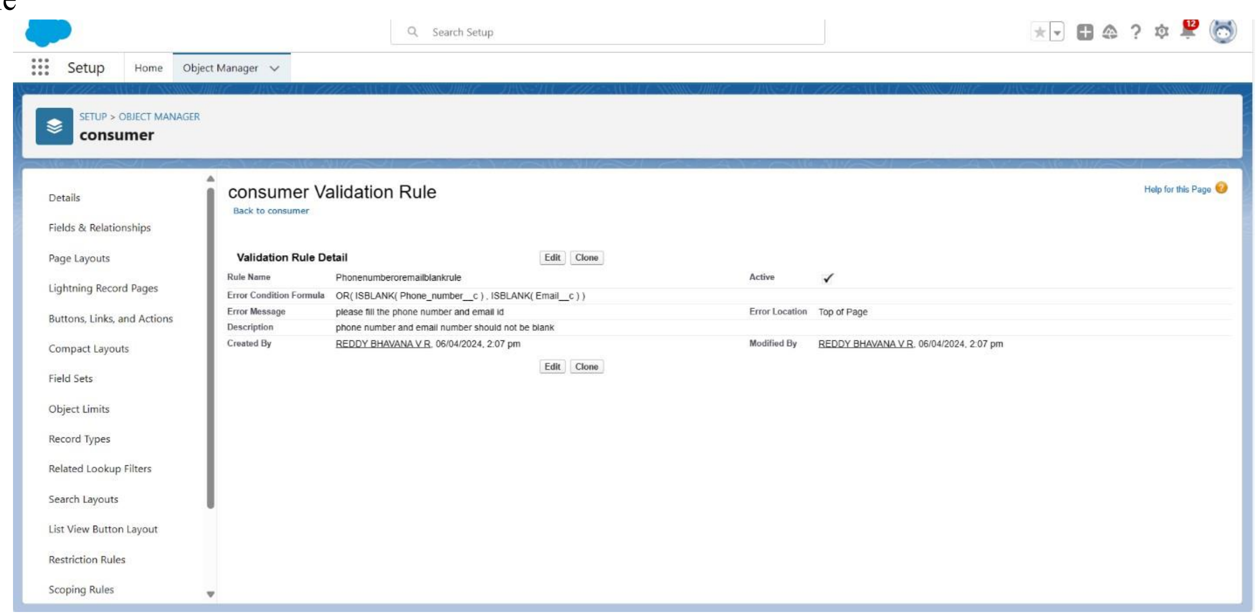
Click on Next -Next -Save and new.



Milestone – 06: Validation Rule

Creating the validation rule for phone number field in consumer object

1. Go to the setup page - click on object manager - From drop down click edit for consumer object.
2. Click on the validation rule - click New.
3. Enter the Rule name as "Phonenumberoremailblankrule ".
4. Enter the description as "phone number and email number should not be blank".
5. Enter the formula as "OR(ISBLANK(phone_number__c) , ISBLANK(email__c))" and check the syntax. 6. Save the validation Rule

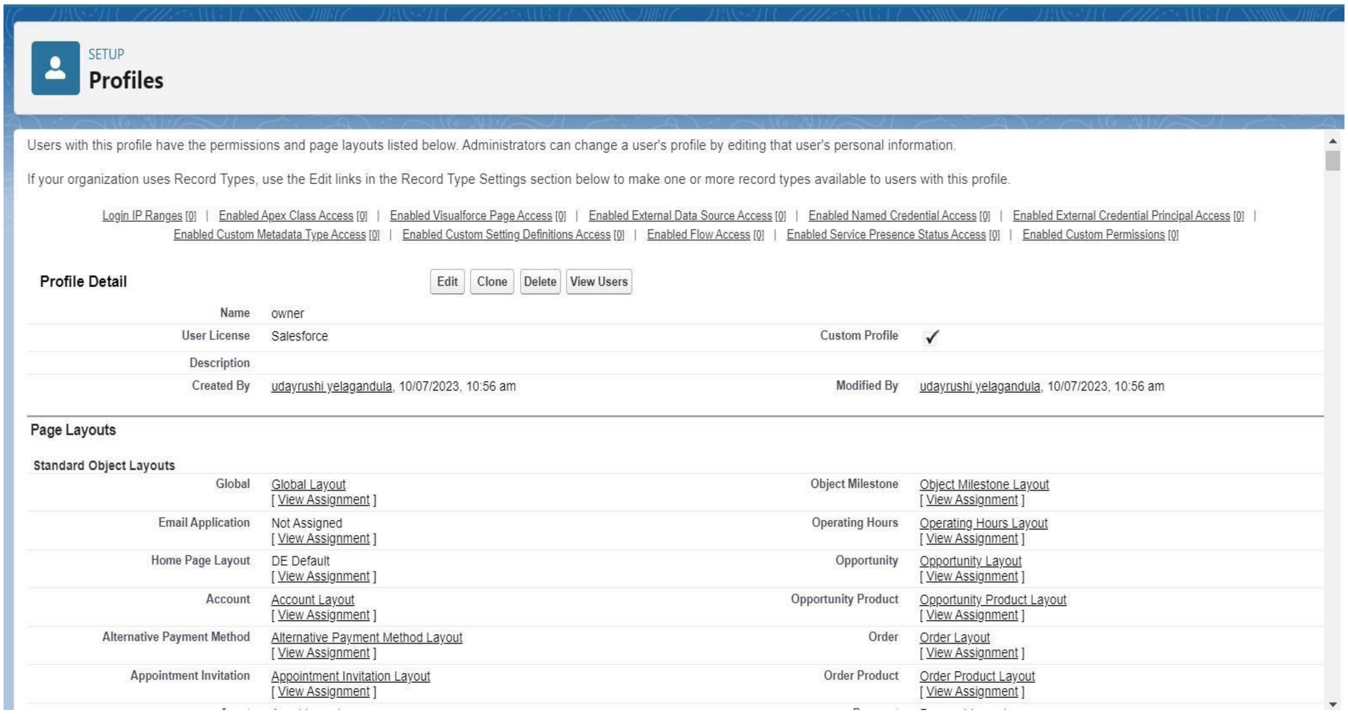


Milestone – 07: Profiles

Owner Profile

To create a new profile:

1. Go to setup - type profiles in quick find box - click on profiles - clone the desired profile (Standard User) - enter profile name (owner) - Save.



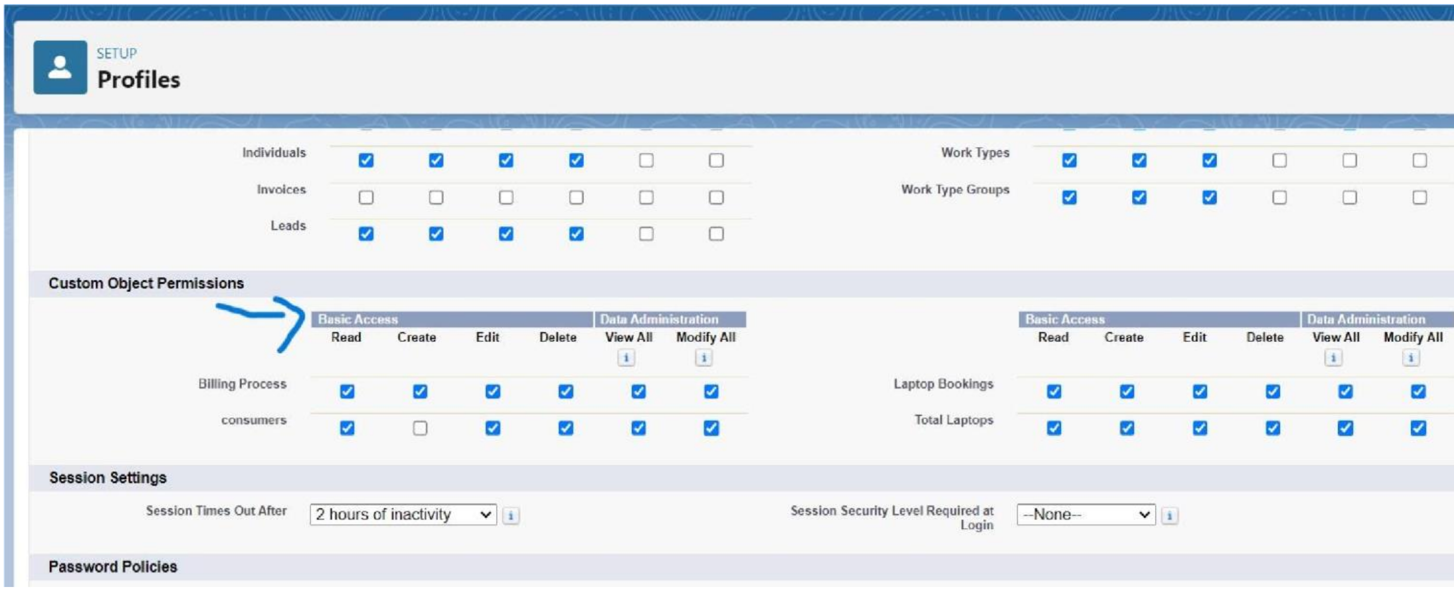
2. Scroll down to Custom Object Permissions and Give access permissions for Total Laptops, consumers , Laptop Booking and Billing Process objects as mentioned in the below diagram.

3.
4. Give Access and Save it.

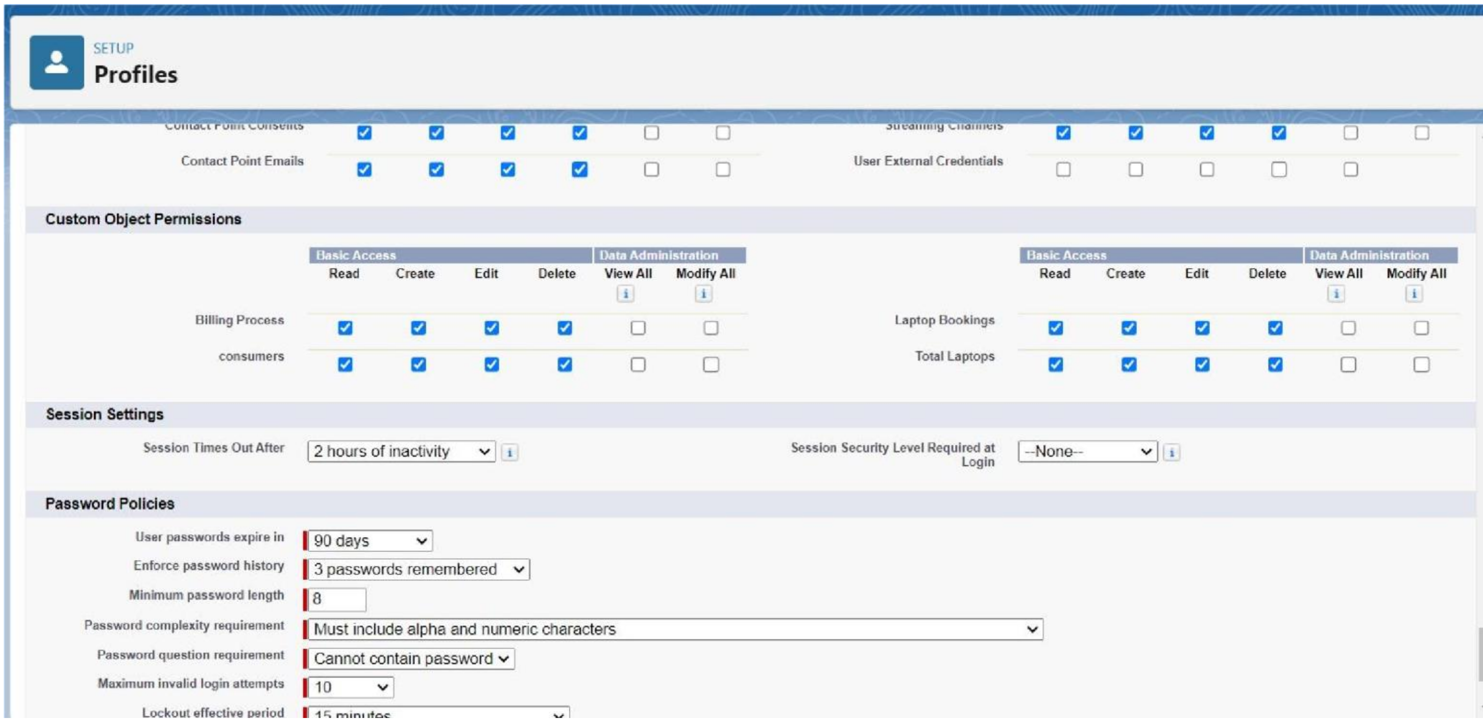
Agent Profile:

1. Go to setup - type profiles in quick find box -click on profiles - clone the desired profile (Standard Platform User) - enter profile name (Agent) -Save.

2. While still on the profile page, then click Edit.
3. Scroll down to Custom Object Permissions and Give access permissions for Total Laptops, consumer , Laptop Bookings and



Billing Process objects as mentioned in the below diagram.



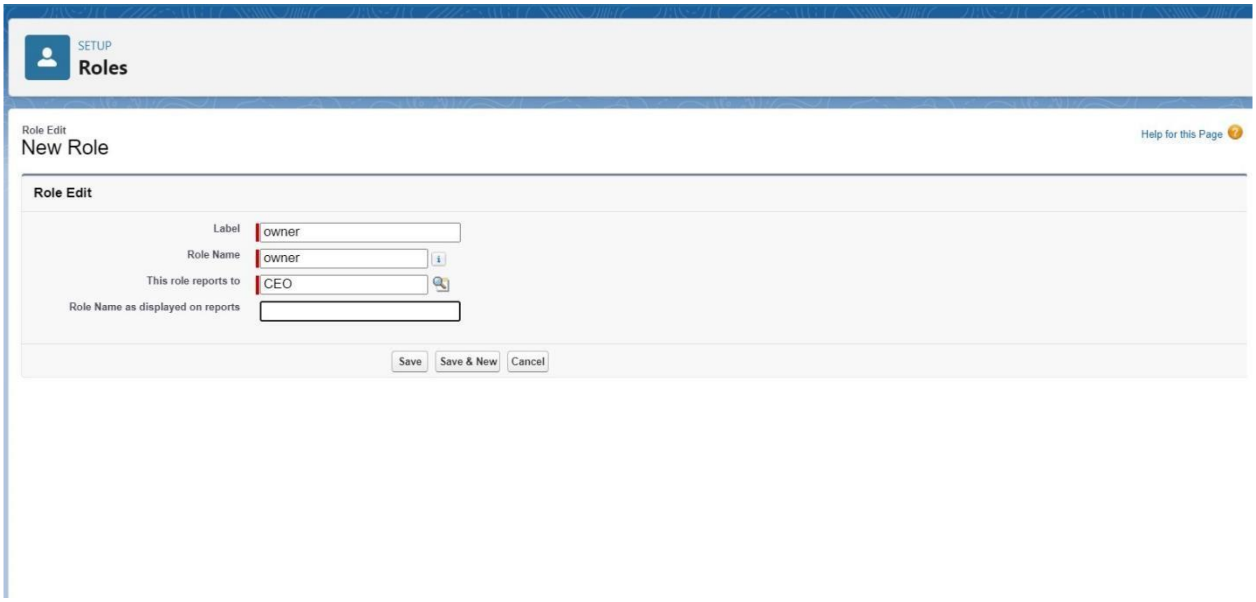
4.

5. Give access and save it.

Milestone – 08: Roles and Hirarchey

Creating Owner Role

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

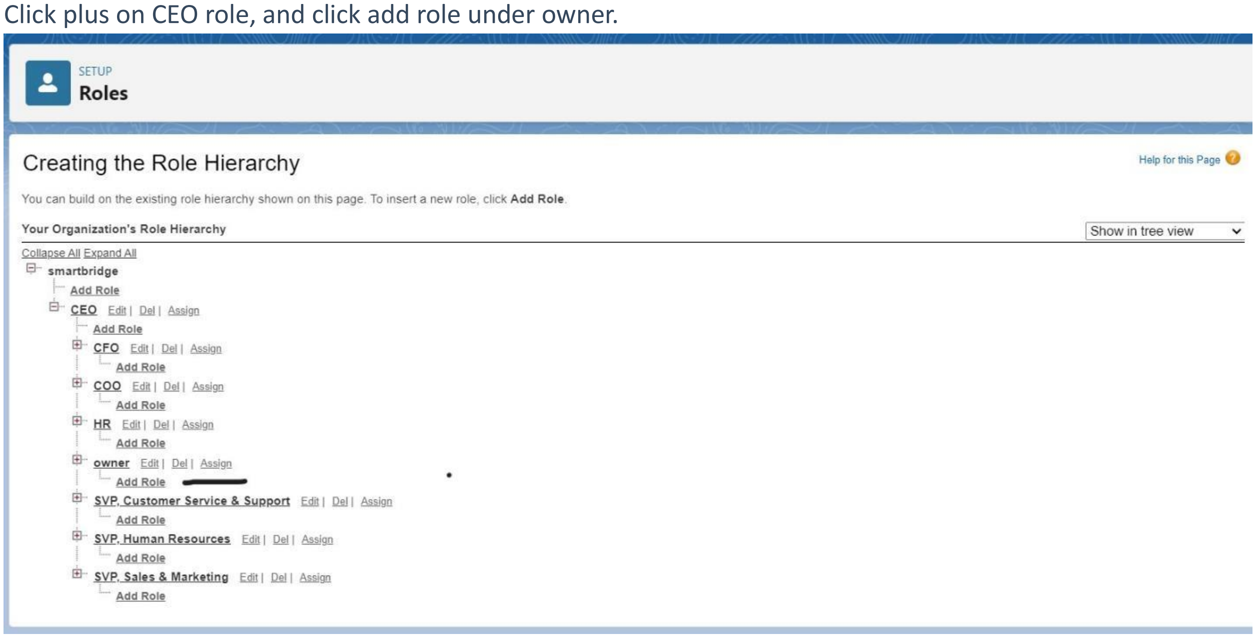


4.
5. Click and save it.

Creating Agent roles:

Creating another two roles under manager

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



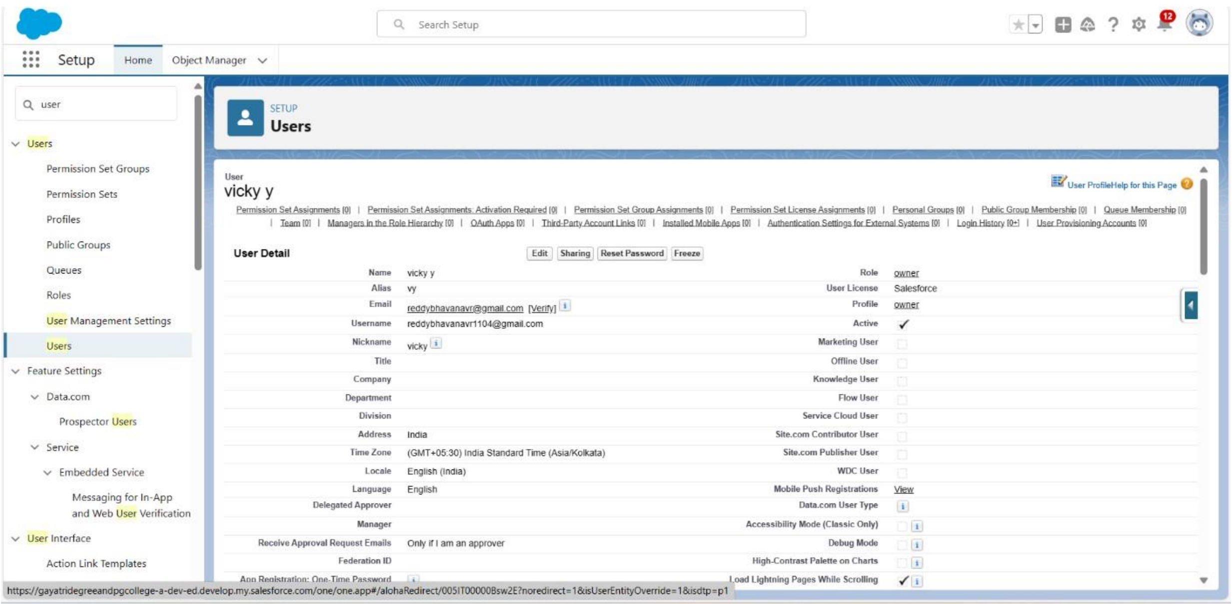
3.

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

Milestone – 09: Users

Create User

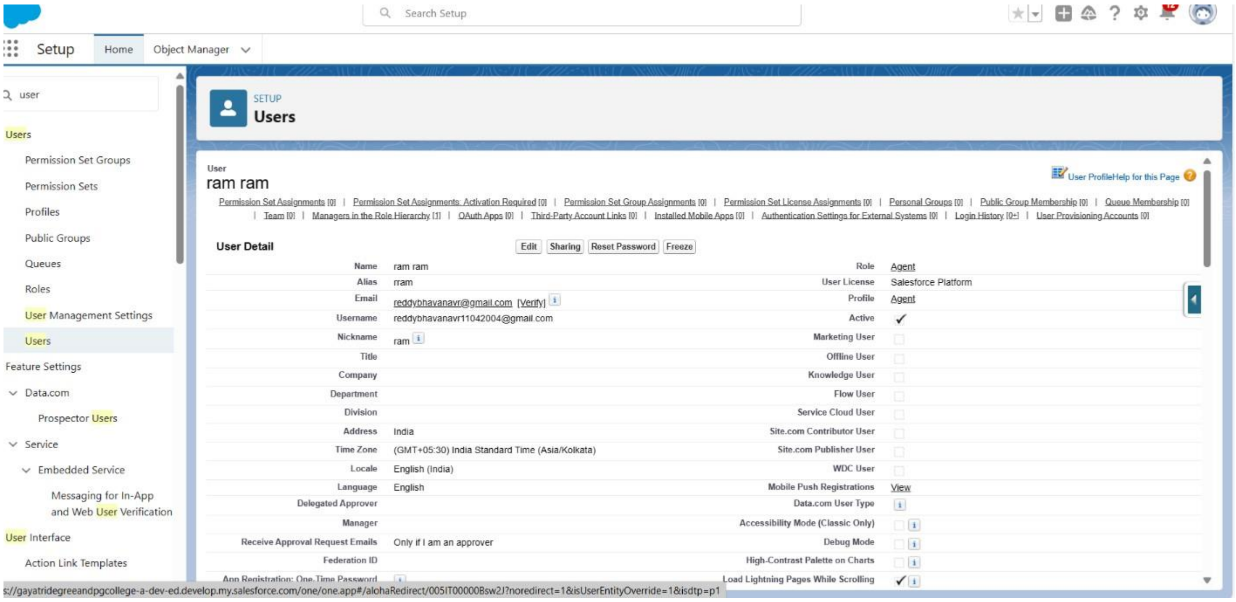
1. Go to setup - type users in quick find box - select users -click New user.
2. Fill in the fields
3. First Name : vicky
4. Last Name : y
5. Alias : Give a Alias Name
6. Email id : reddybhavanavr@gmail.com
7. Username : reddybhavanavr1104@gmail.com
8. Nick Name : Vicky
9. Role : owner
10. User license : Salesforce 11. Profiles : owner.



Save it.

Activity 2: creating another users

1. Go to setup -type users in quick find box - select users -click New user.
2. Fill in the fields
3. First Name : ram
4. Last Name : ram
5. Alias : Give a Alias Name
6. Email id : reddybhavanavr@gmail.com
7. Username : reddybhavanavr11042004@gmail.com
8. Nick Name : ram
9. Role : Agent
10. User license : Salesforce platform 11. Profiles : standard platform user.



12.

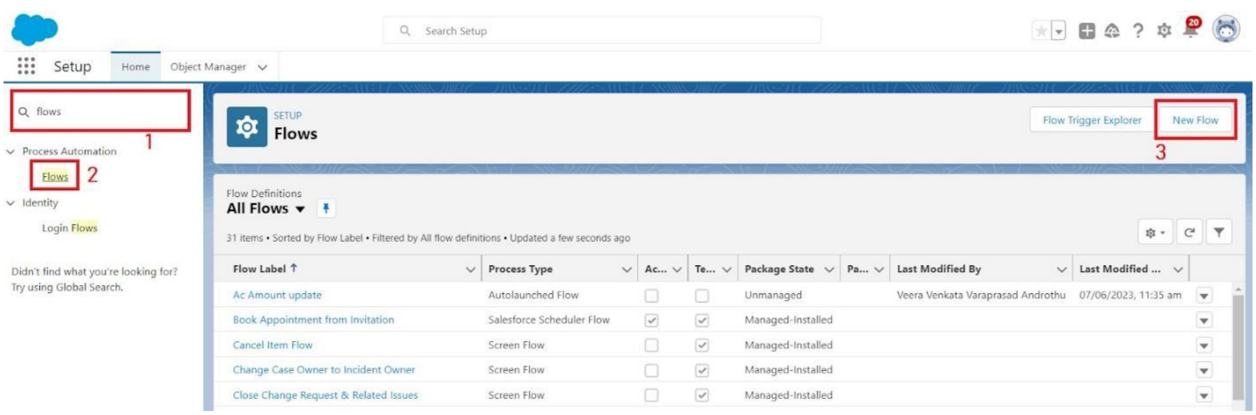
13. Save it.

Milestone – 10: Flows Create A

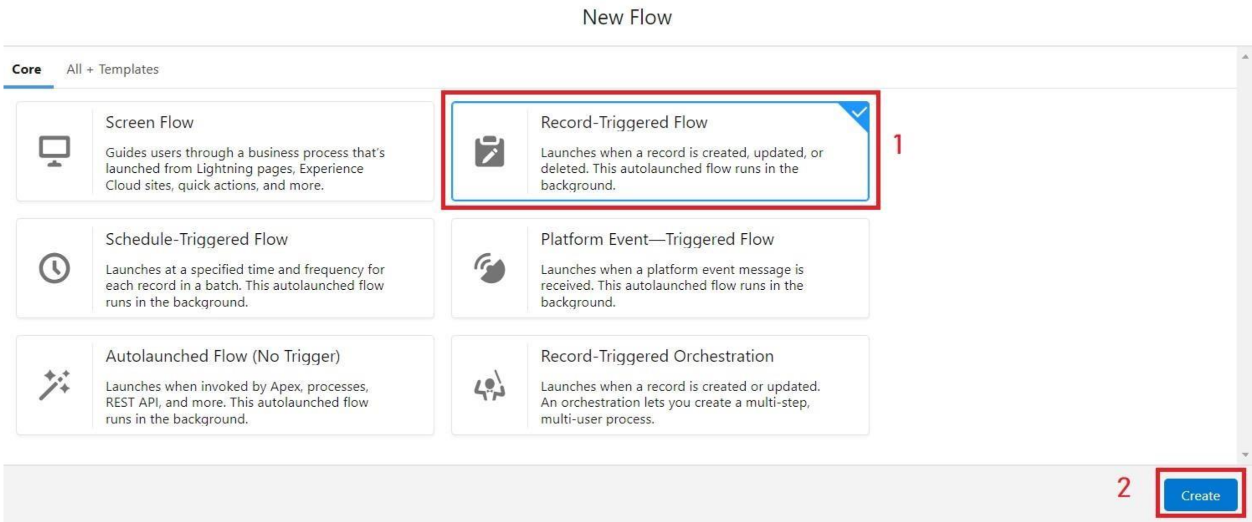
Flow On Dell Laptop

Activity -

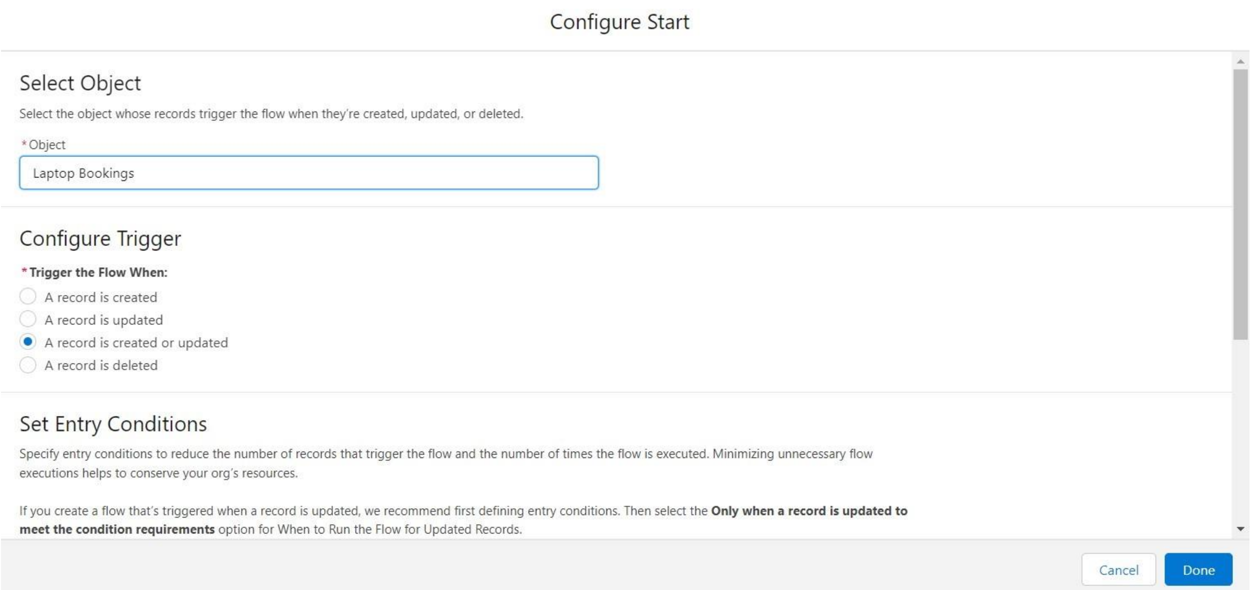
1. Go to setup -type Flow in quick find box - Click on the Flow and Select the New Flow.

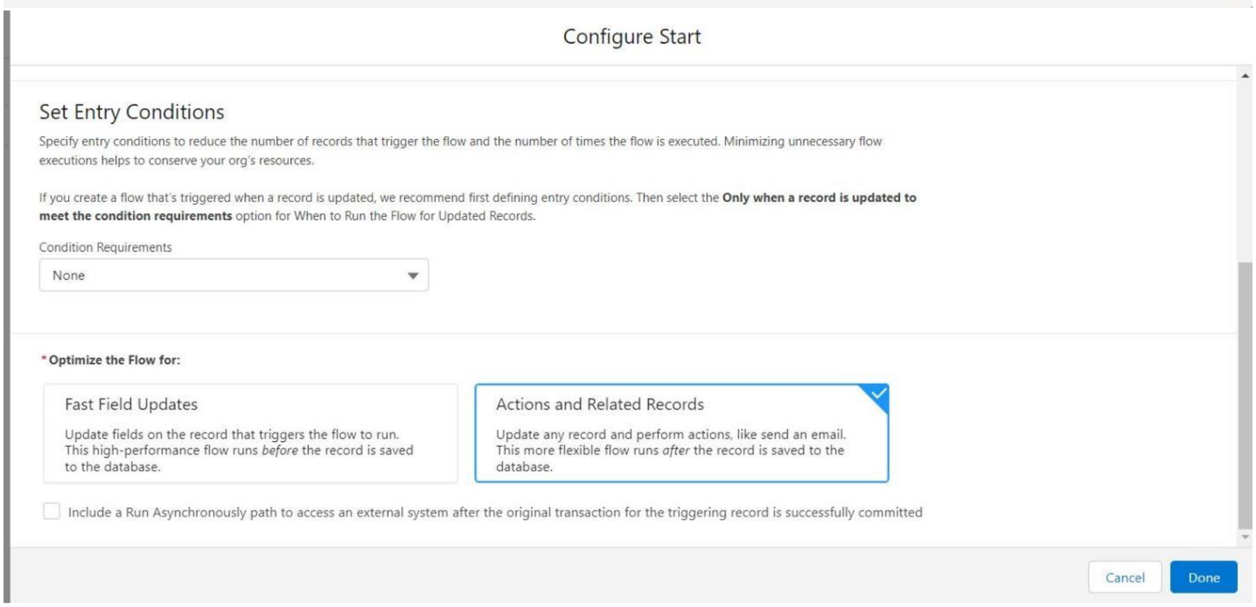


2. Select the Record-triggered flow and Click on Create.

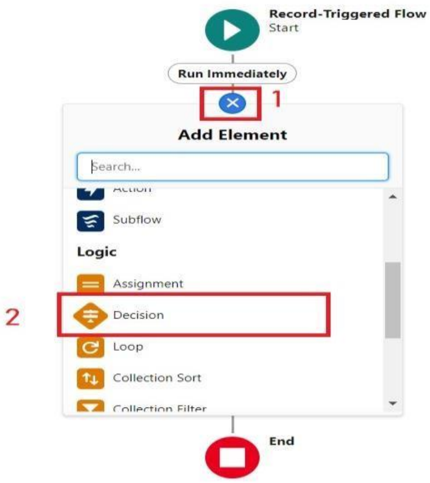


3. Select the Object as a Laptop Booking in the Drop down list.
4. Select the Trigger Flow when: “A record is Created or Updated”.
5. Select the Optimize the flow for: “Actions and Related Records” and Click on Done.



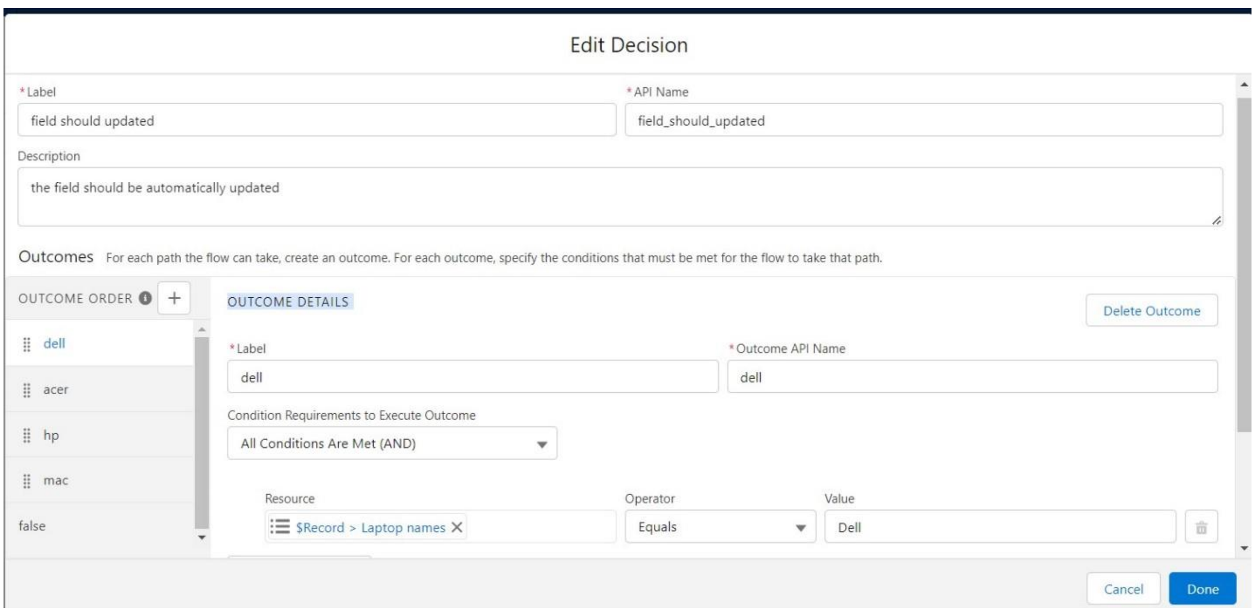


6. Under the Record-triggered Flow Click on "+" Symbol and In the Drop down List select the "Decision Element".



7. Enter the Details Label: Field should be Update, API name: Gets Automatically Generated. 8. Enter the Outcome Details Label: dell , Outcome API name: Gets Automatically Generated.

- Resource: Select Record.Laptop booking__c.
- Operator: Select Equals.
- Value: Select dell
- Add the same outcome order to acer , hp,mac.
- Click done.



9.

10. Go to flow page

11. Beside dell there is a symbol '+' click on that.

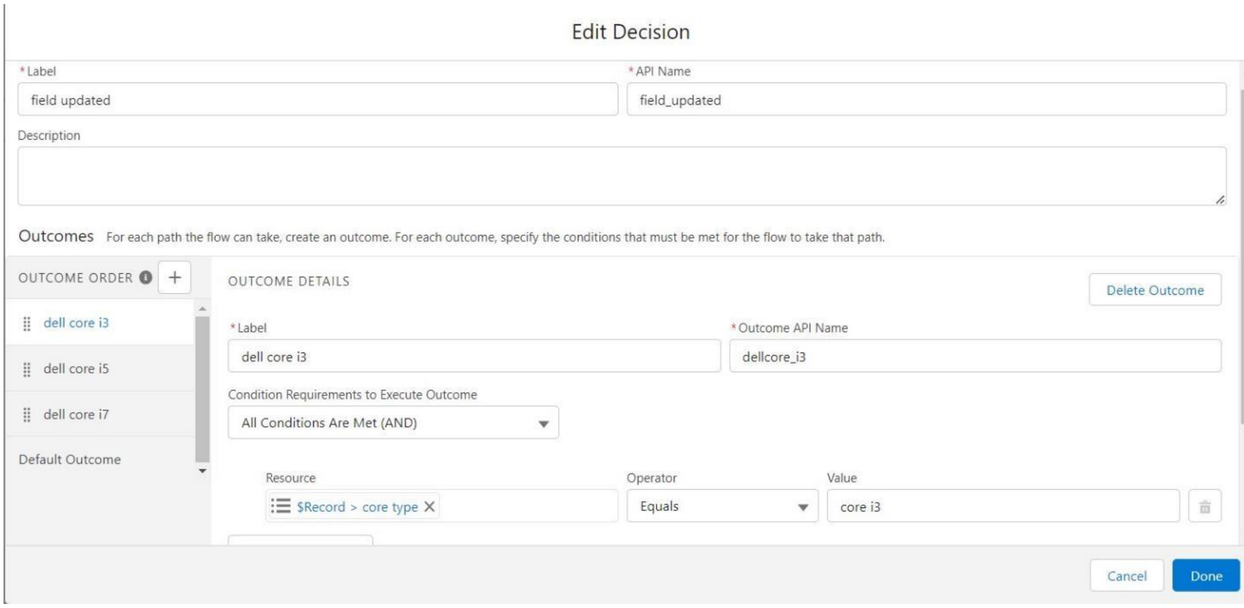
12. Again select decision

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

14. 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

15. 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.

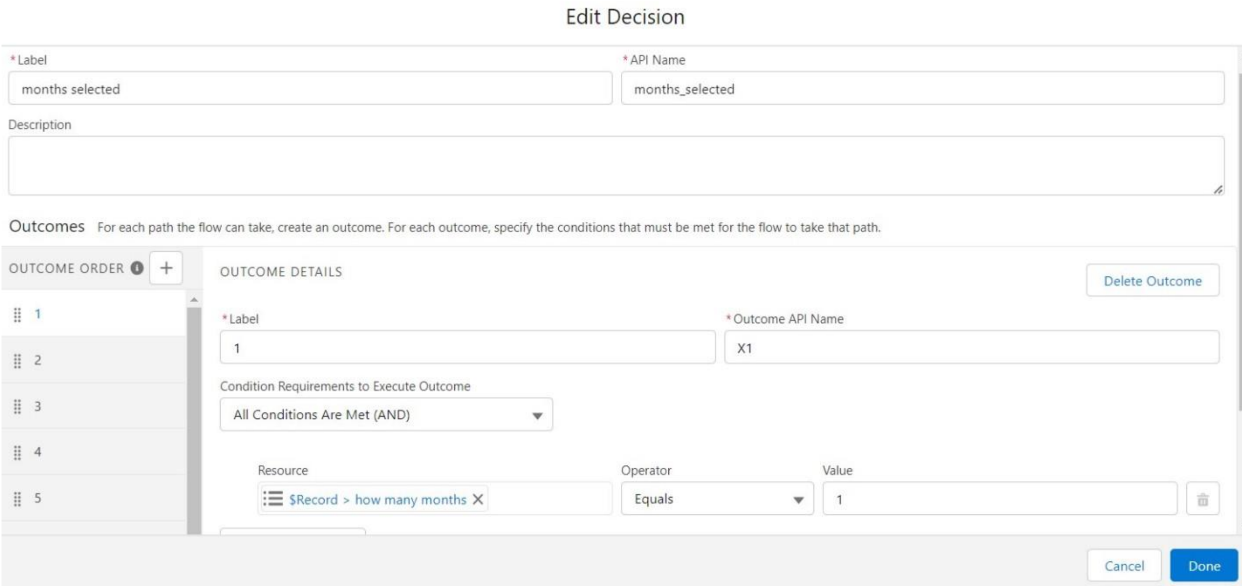


18.
19. So go to the flow page select ‘+’ after core i3 then again select the decision.
20. Enter the Details Label: months selected , API name: Gets Automatically Generated.
21. Enter the Outcome Details Label: dell 1(i3) , Outcome API name: Gets Automatically Generated.
22.
   - Resource: Select Record how many months.
   - Operator: Select Equals.
   - Value: 1.

23. 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..
24. Click ‘+’ outcome details
25. 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..
26. Click ‘+’ outcome details
27. 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..

28. Click ‘+’ outcome details
29. 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.

30.



31. Follow the above picture you will understand.
32. After dell 1(i3) there is ‘+’ symbol like dell 2(i3),dell 3(i3),dell 4(i3),dell 5(i3).
33. Click on ‘+’ then select update records
34. Enter the Details Label: one month of dell i3 rate , API name: Gets Automatically Generated.
35. Field:- Amount__c , value:- for dell 1(i3)-1000, dell 2(i3)-2000, dell 3(i3)-3000, dell 4(i3)-4000, dell 5(i3)-5000. Follow for all these finally 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.

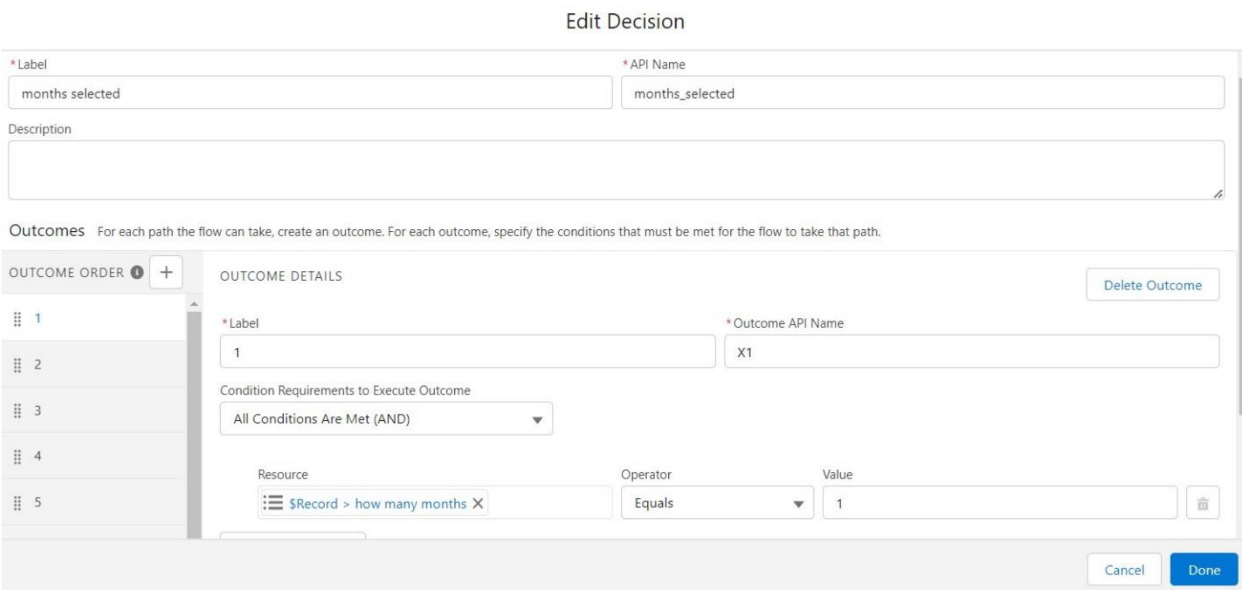
    - Resource: Select Record how many months.
    - Operator: Select Equals.
    - Value: 1.

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.

47. 

48. Follow the above picture you will understand.

49. After dell 1(i7) there is ‘+’ symbol like dell 2(i7),dell 3(i7),dell 4(i7),dell 5(i7).

50. Click on ‘+’ then select update records

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

52. 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 53. Click done.

Creating Flow On Acer Laptop

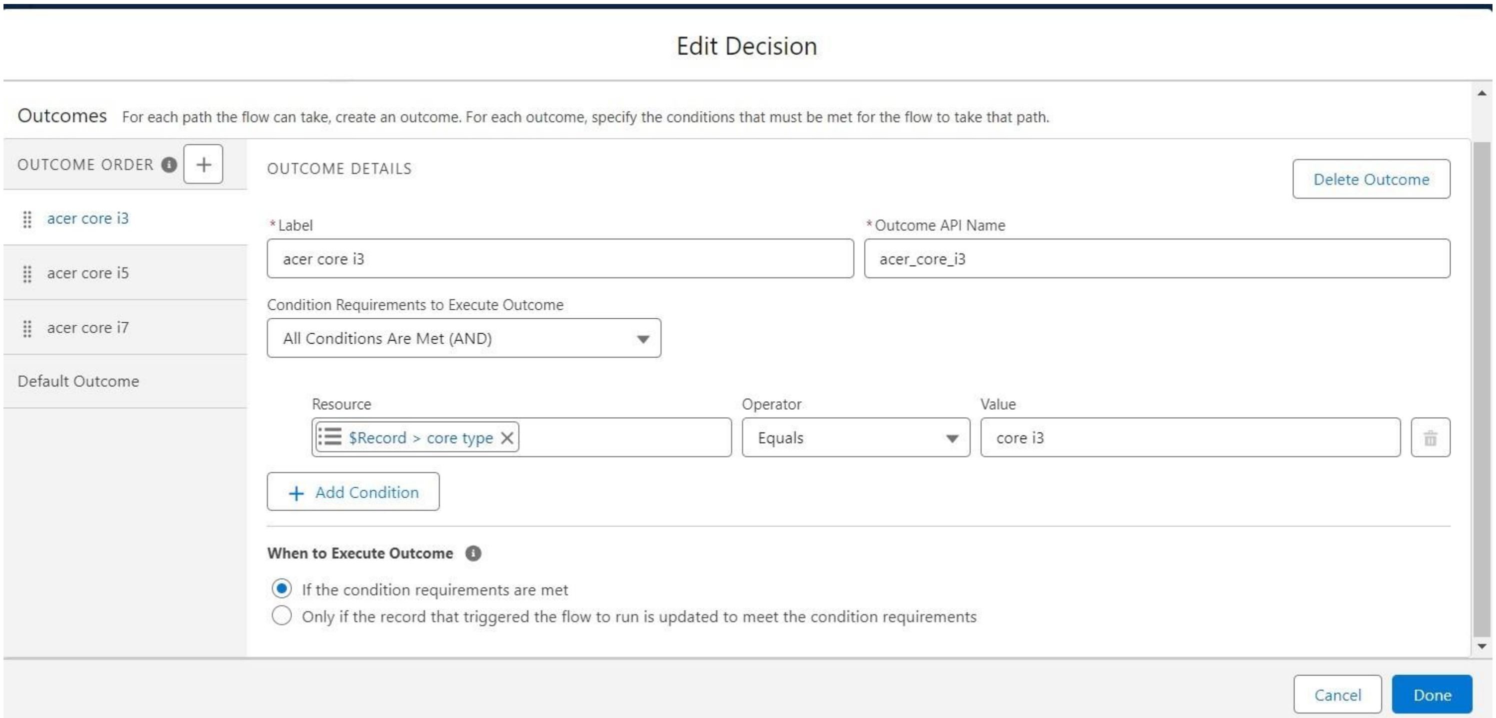
1. Go to flow page

2. Beside acer there is a symbol ‘+’ click on that.

3. Again select decision

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

5. select the Outcome Details Label: acer core i3 , Outcome API name: Gets Automatically Generated.
   - Resource: Select Record core type.
   - Operator: Select Equals.
   - Value: Select core i3.



Click done.

6. Go to flow page

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

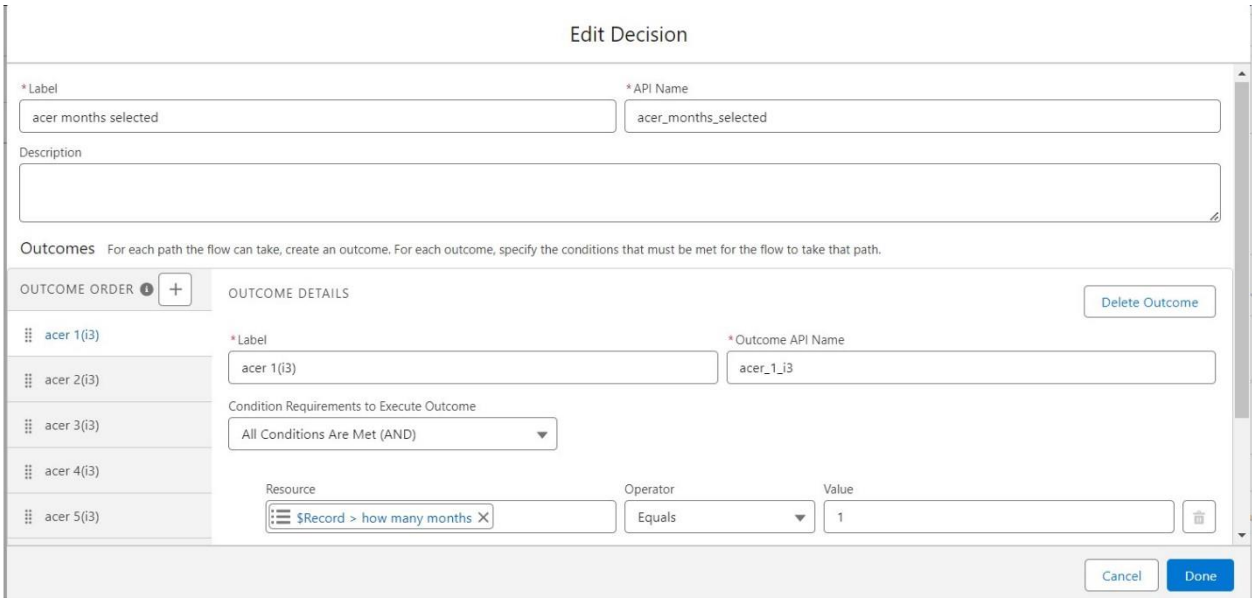
9. Enter the Details Label: months selected , API name: Gets Automatically Generated.
10. Enter the Outcome Details Label: acer 1(i3) , Outcome API name: Gets Automatically Generated.
11.

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

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

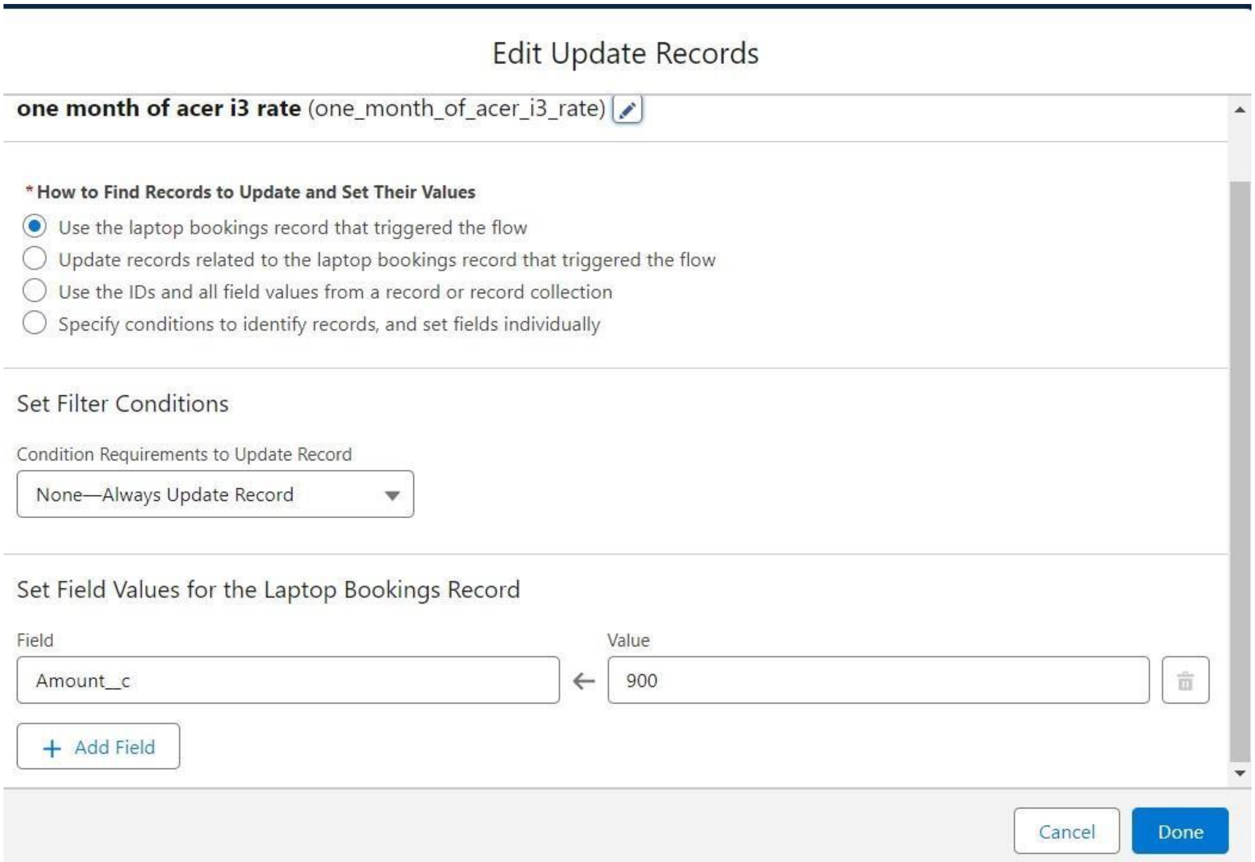
- Resource: Select Record how many months.
- Operator: Select Equals.
- Value: Select 4.

17. Click '+' outcome details
18. Enter the Outcome Details Label: acer 5(i3) , Outcome API name: Gets Automatically Generated.
    - Resource: Select Record how many months.
    - Operator: Select Equals.
    - Value: Select 5.



Click done.

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

23. 

24. Click done.

Creating A Flow On Hp Laptop

1. Go to flow page

2. Beside hp there is a symbol '+' click on that.
3. Again select decision
4. Enter the Details Label: Field is Update, API name: Gets Automatically Generated.
5. select the Outcome Details Label: hp core i5 , Outcome API name: Gets Automatically Generated.
   - Resource: Select Record core type.
   - Operator: Select Equals.
   - Value: Select hp i5.

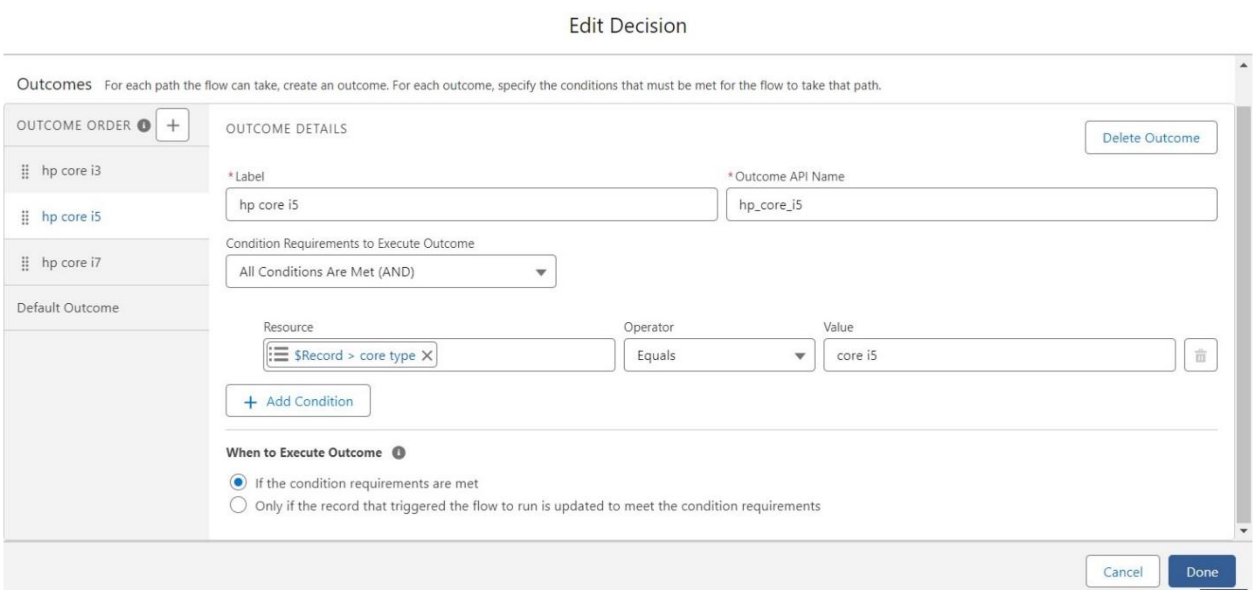
6. Go to flow page

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

9. Enter the Details Label: hp field should be updated , API name: Gets Automatically Generated.
10. Enter the Outcome Details Label: hp 1(i5) , Outcome API name: Gets Automatically Generated.
11.
   - Resource: Select Record how many months.

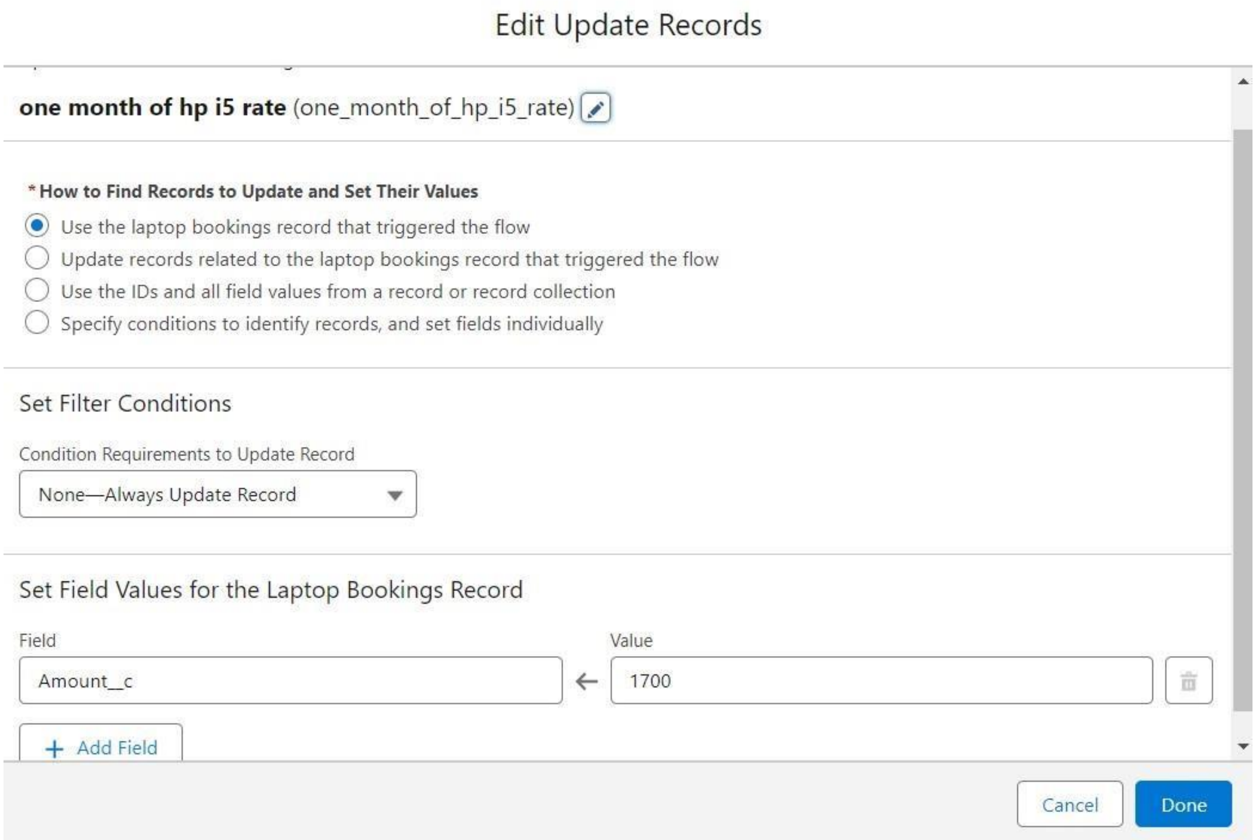
- Operator: Select Equals.
- Value: 1.

12. Enter the Outcome Details Label: hp 2(i5) , Outcome API name: Gets Automatically Generated.
    - Resource: Select Record how many months.
    - Operator: Select Equals.
    - Value: Select 2..
13. Click '+' outcome details
14. Enter the Outcome Details Label: hp 3(i5) , Outcome API name: Gets Automatically Generated.
    - Resource: Select Record how many months.
    - Operator: Select Equals.
    - Value: Select 3..
15. Click '+' outcome details
16. Enter the Outcome Details Label: hp 4(i5) , Outcome API name: Gets Automatically Generated.
    - Resource: Select Record how many months.
    - Operator: Select Equals.
    - Value: Select 4.
17. Click '+' outcome details
18. Enter the Outcome Details Label: hp 5(i5) , Outcome API name: Gets Automatically Generated.
    - Resource: Select Record how many months.
    - Operator: Select Equals.
    - Value: Select 5.



Click on done.

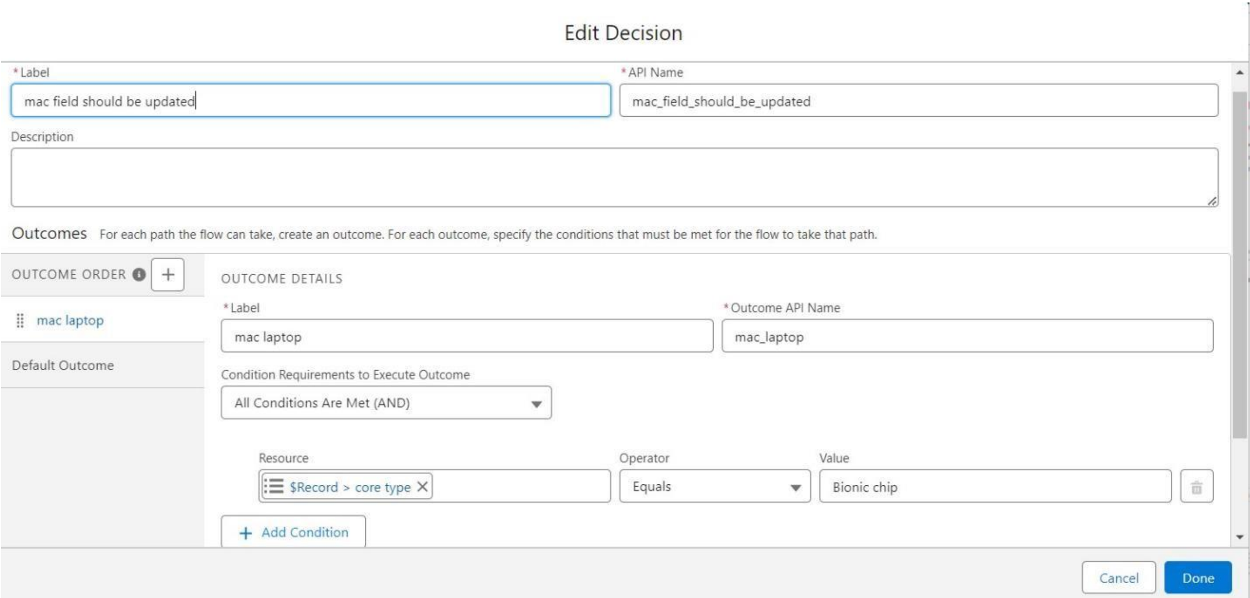
19. After hp 1(i5) there is '+' symbol like hp 2(i5), hp 3(i5), hp 4(i5),hp 5(i5).
20. Click on '+' then select update records
21. Enter the Details Label: one month of hp i5 rate , API name: Gets Automatically Generated.
22. Field:- Amount__c , value:- for hp 1(i5)-1700, hp 2(i5)-3400, hp 3(i5)-5100, hp 4(i5)6800, hp 5(i5)-8500. Follow for all these finally



Click done.

Creating A Flow On Mac Laptop

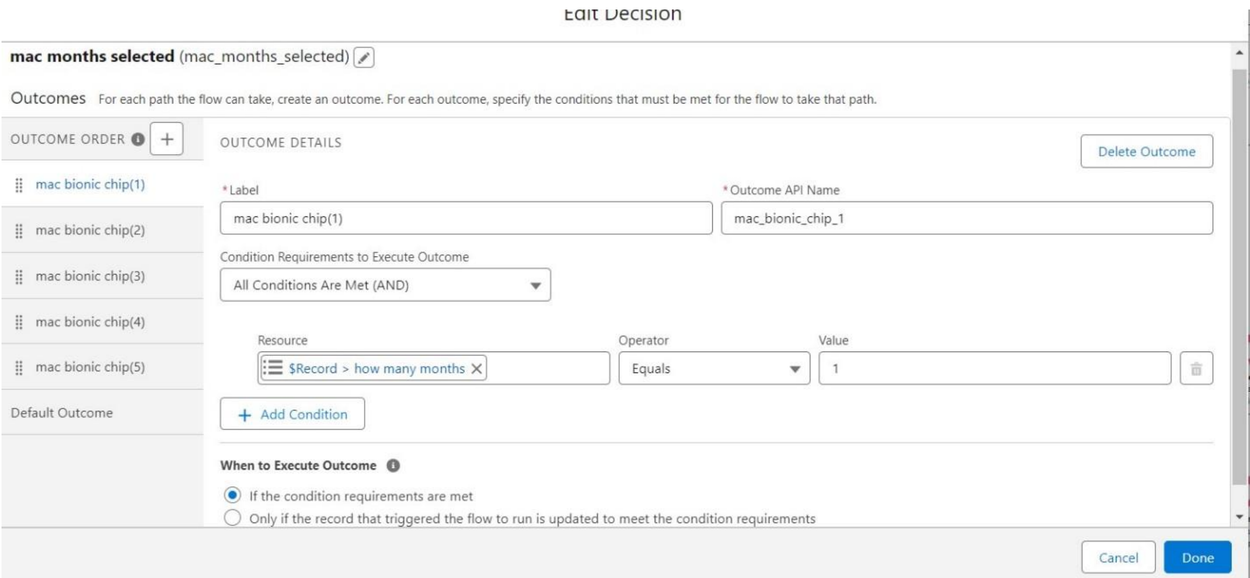
1. Go to flow page
2. Beside mac there is a symbol '+' click on that.
3. Again select decision
4. Enter the Details Label: mac should be Updated, API name: Gets Automatically Generated. 5. select the Outcome Details Label: mac laptop , Outcome API name: Gets Automatically Generated.
   - Resource: Select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



Click done.

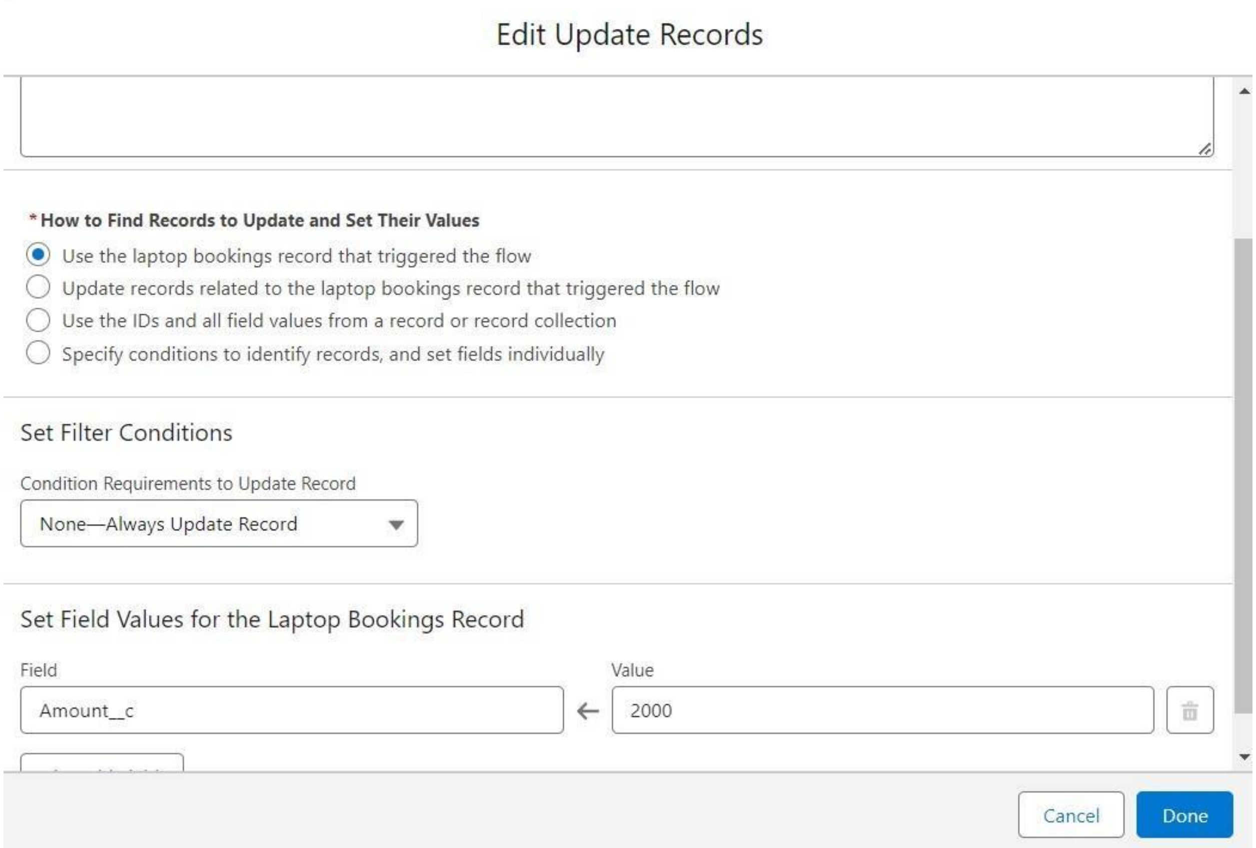
6. Go to flow page
7. Beside Mac there is a symbol '+' click on that.
8. Again select decision
9. Enter the Details Label: Mac months selected , API name: Gets Automatically Generated.
10. Enter the Outcome Details Label: mac bionic chip(1) , Outcome API name: Gets Automatically Generated.
11.
    - 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.



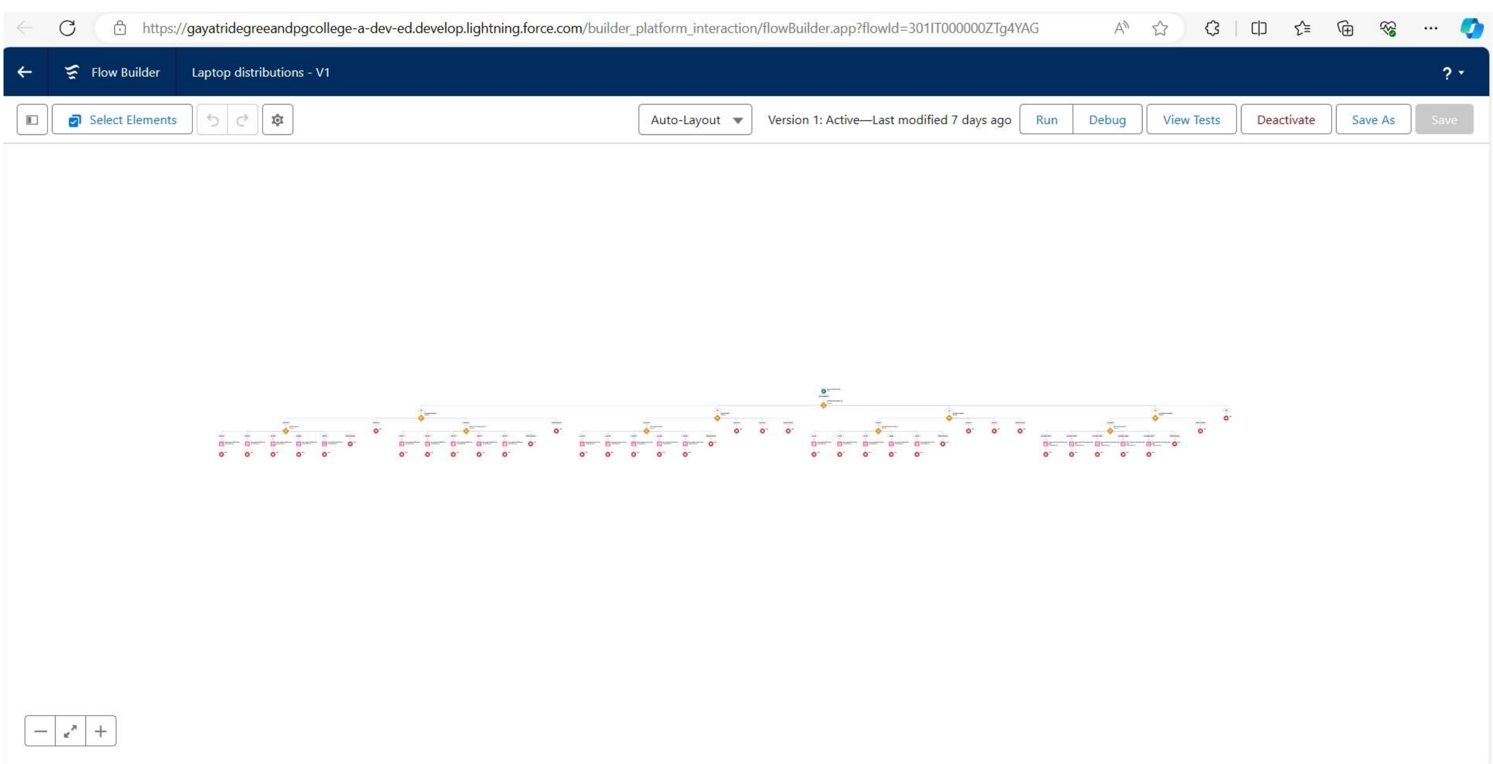
Click done.

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 rate6800, five month of mac bionic chip rate-8500. Follow for all these finally



Click done.

FLOW:



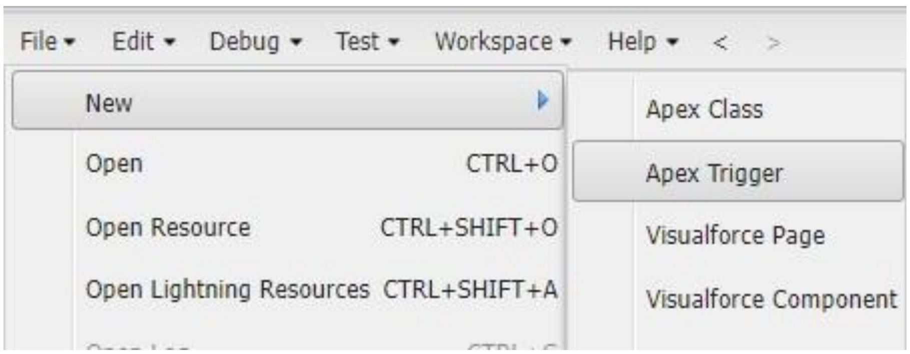
Click on save .

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

Milestone – 11: Apex

create a new trigger

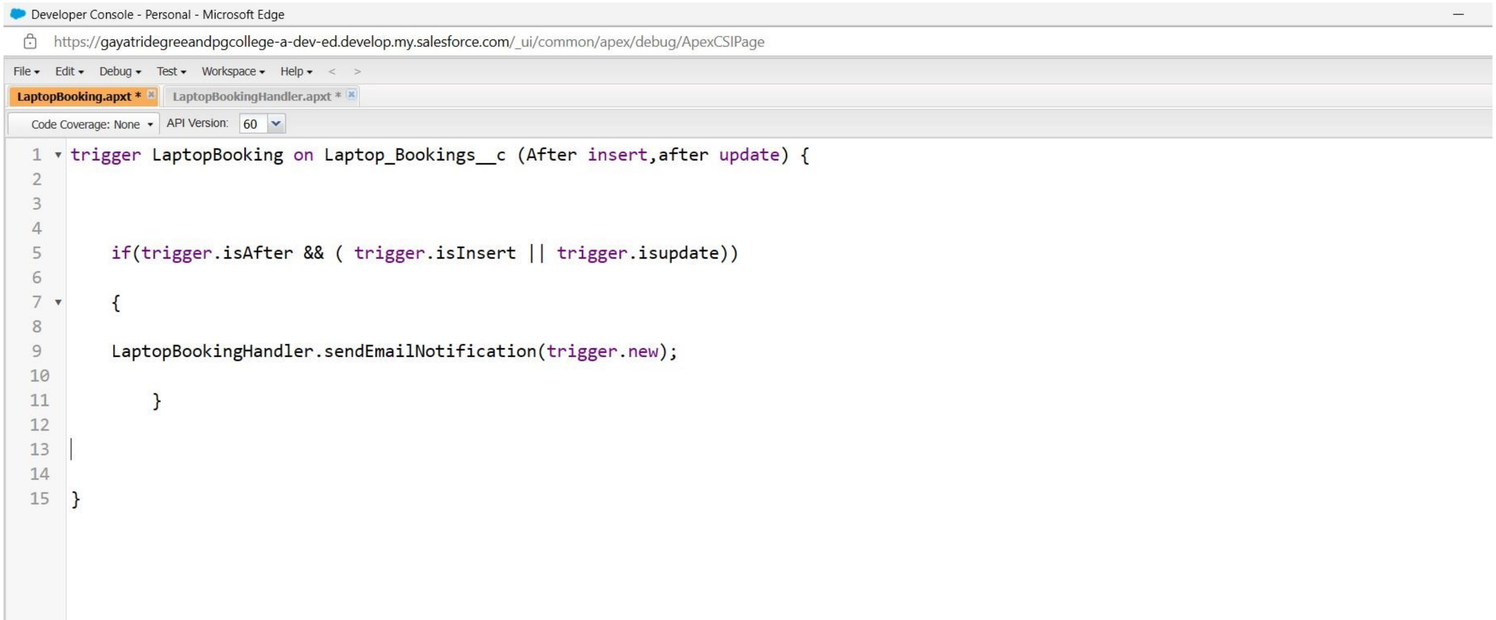
1. While still in the trailhead account, navigate to the gear icon in the top right corner.
2. Click on developer console and you will be navigated to a new console window.
3. Click on the File menu in the toolbar, and click on new- Trigger.
4. Enter the trigger name and the object to be triggered.



1.LaptopBooking - trigger name
2.Laptop_Bookings__c – sObject

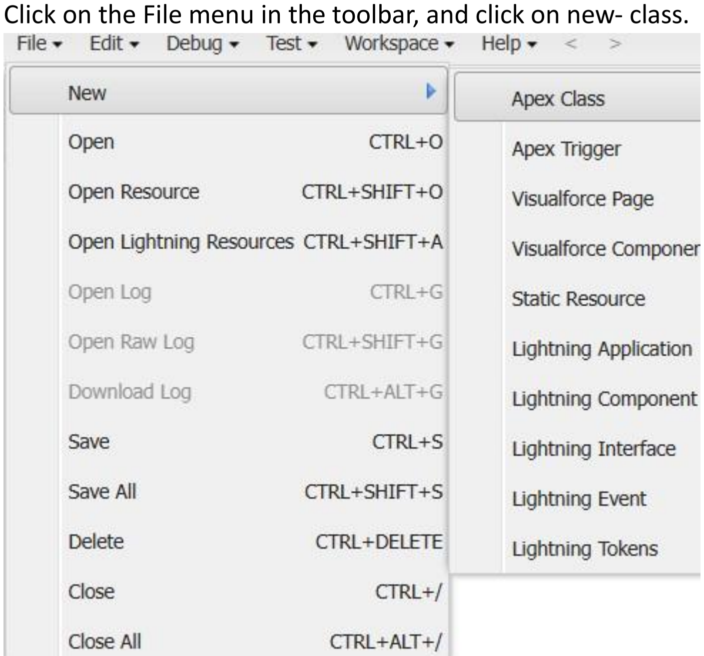
Trigger code:

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

   if(trigger.isAfter && ( trigger.isInsert || trigger.isupdate))
   {
   LaptopBookingHandler.sendEmailNotification(trigger.new);
      }


}
```



create a new class:

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- class.

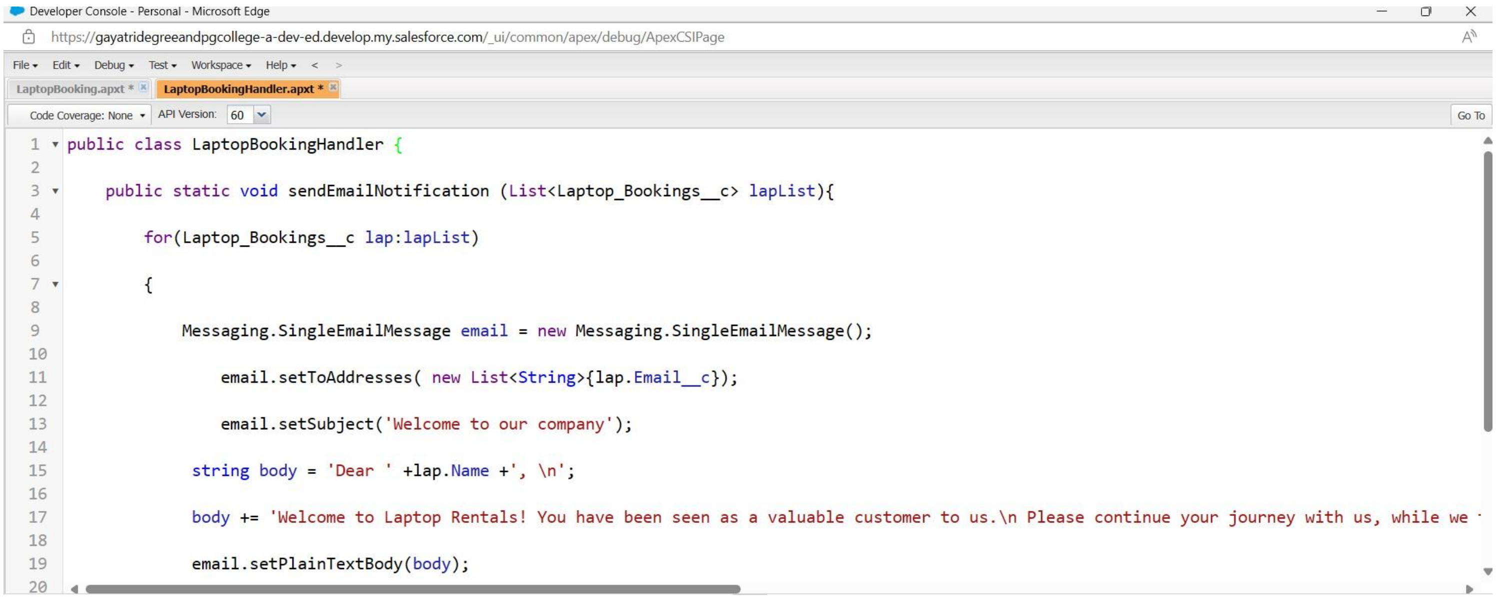


4.
5. Class name:- LaptopBookingHandler

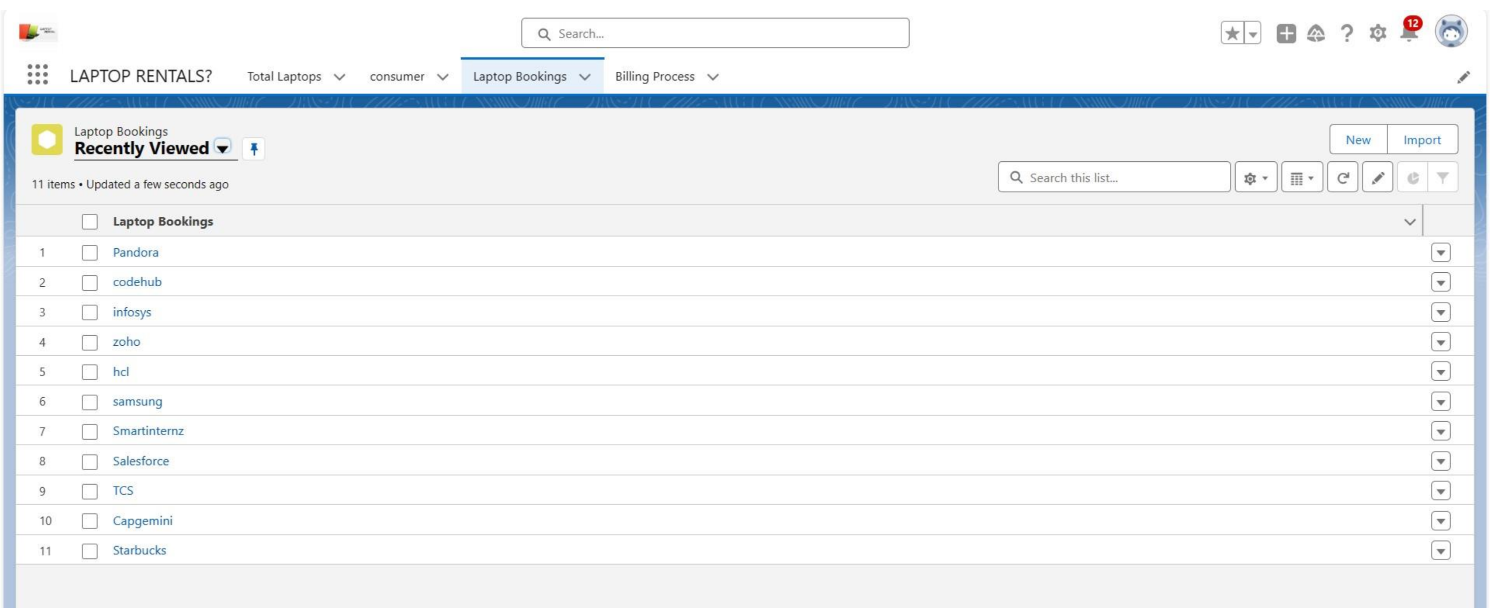
6. **Code Snippet** :

public class LaptopBookingHandler {
  public static void sendEmailNotification (List<Laptop_Bookings__c> lapList){   for(Laptop_Bookings__c lap:lapList)
    {
      Messaging.SingleEmailMessage email = new Messaging.SingleEmailMessage();   email.setToAddresses(new List<String>{lap.Email__c});   email.setSubject('Welcome to our company');   string body = 'Dear ' +lap.Name +', \n';
      body += 'Welcome to Laptop Rentals! You have been seen as a valuable customer to us.\n Please continue your journey with us, while we try to provide you with good quality resources. \n

```
Laptop Amount = ' + lap.Amount__c + ' \n core type = '+lap.core__c +' \n Laptop type =
'+lap.Laptop_type__c;            email.setPlainTextBody(body);
            Messaging.sendEmail(new List<Messaging.SingleEmailMessage>{email});

      }
    }
}
```



Note: Before creating reports just fill the 10-12 records in the Laptop Bookings object. Create records for each one you have to create at least 2 different records i.e dell(i3), dell(i7),acer(i3),hp(i5),mac(bionic chip).

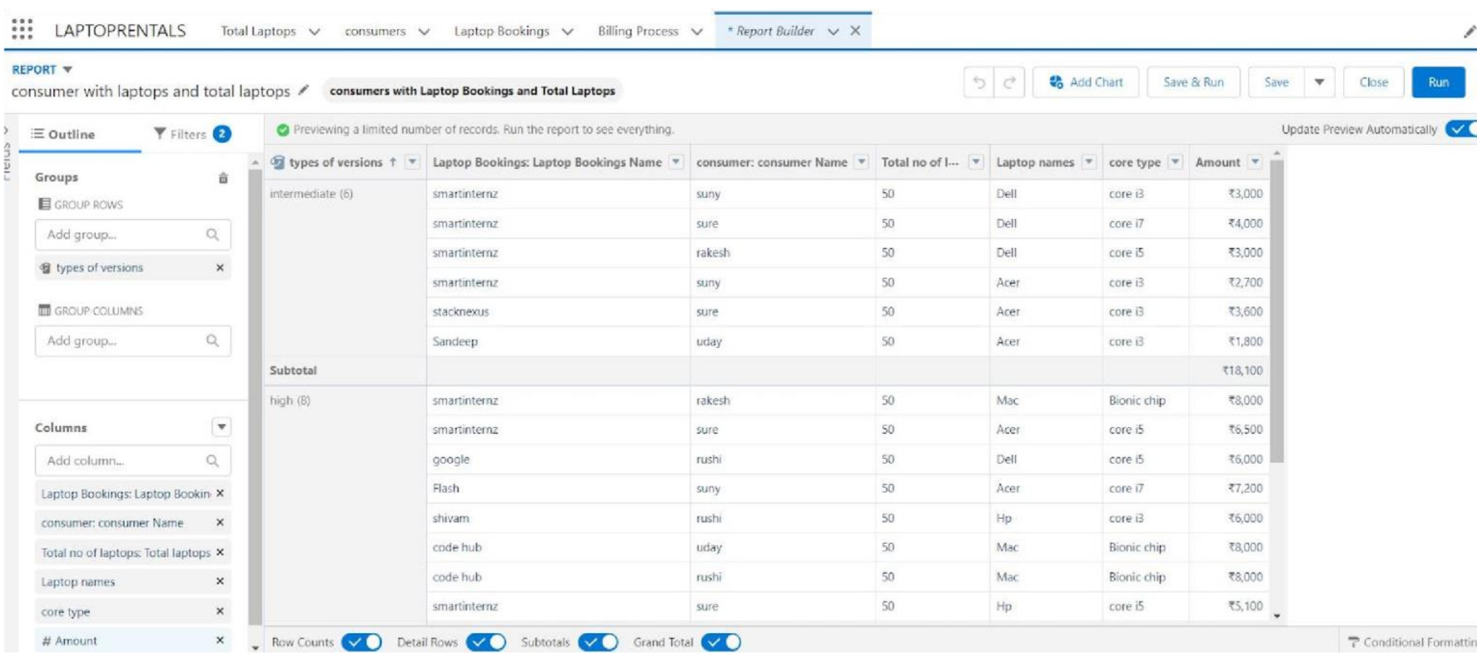


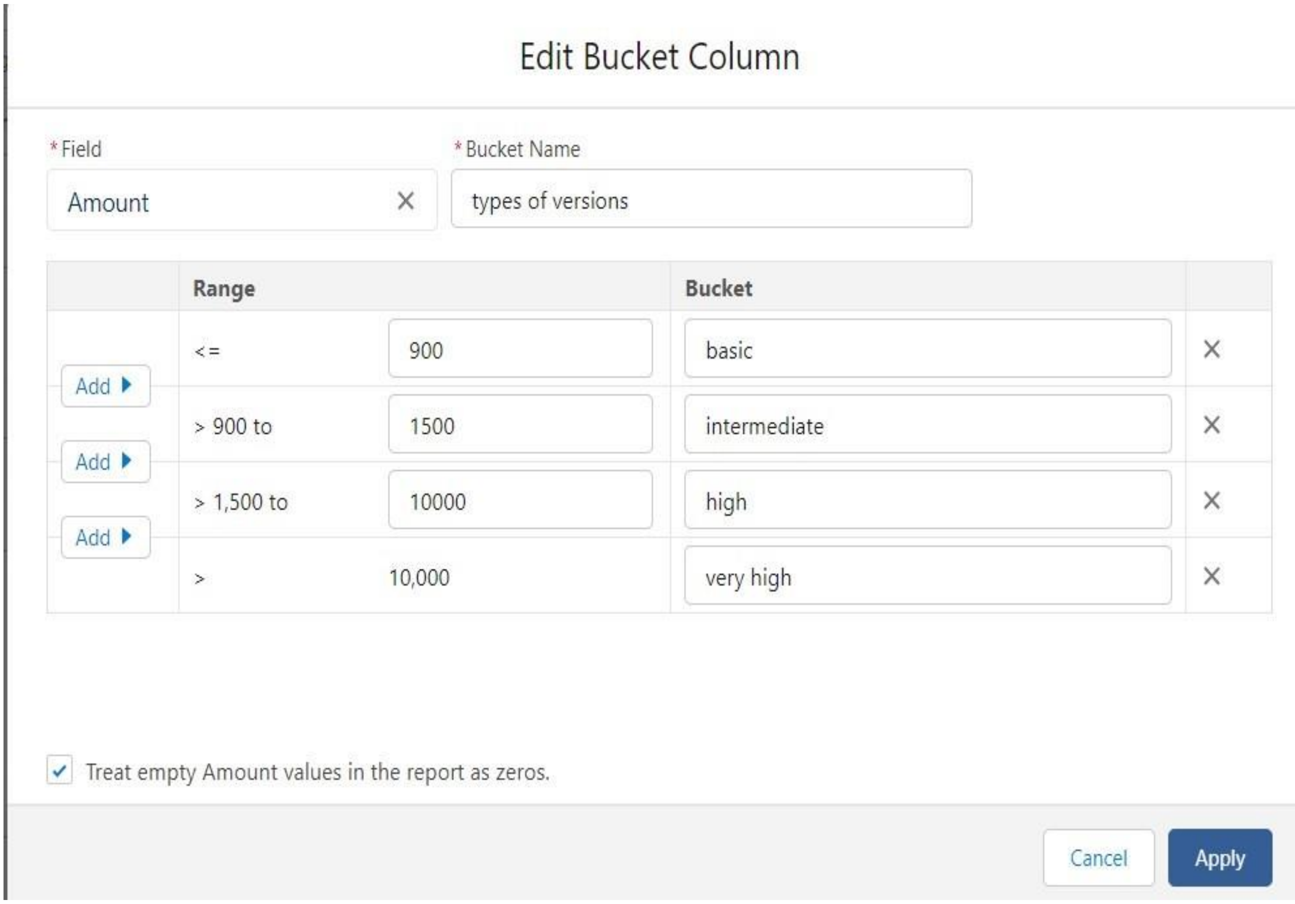
Milestone – 12: Report

Create Report

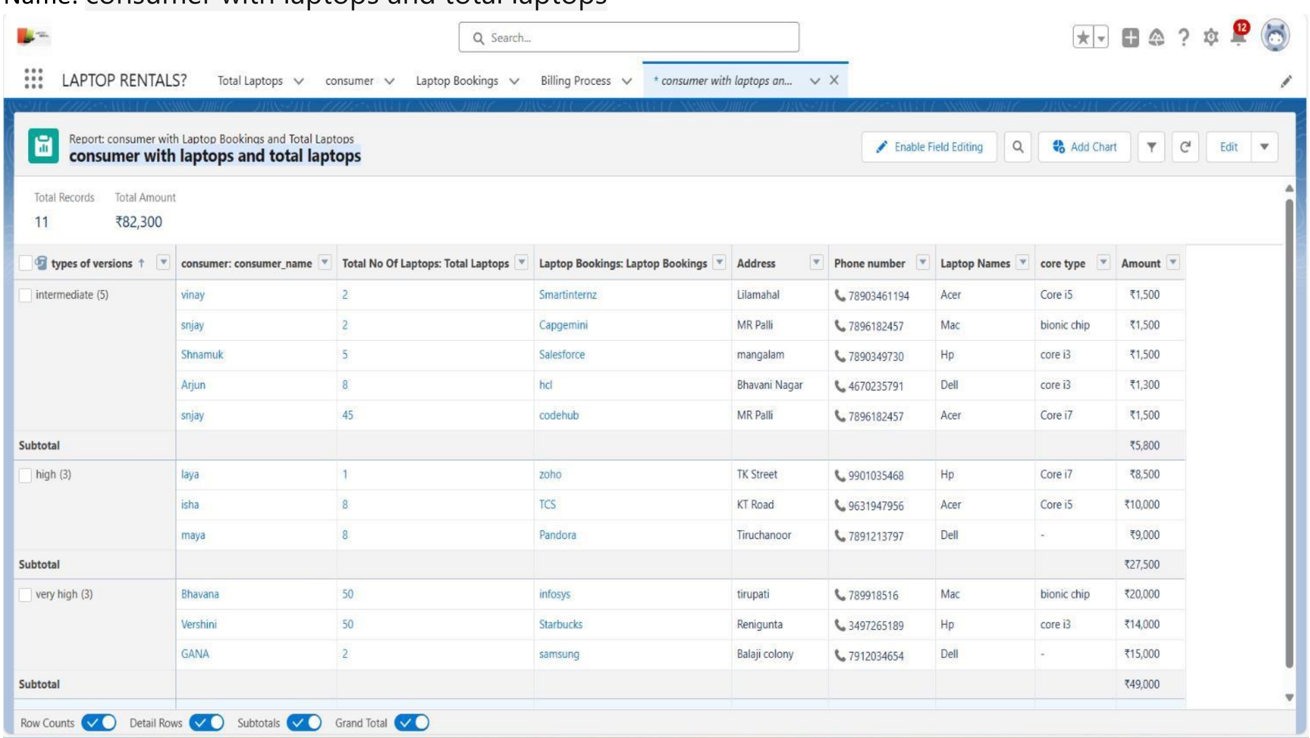
1. Go to the app -click on the reports tab
2. Click New Report.
3. Select report type from category or from report type panel or from search panel “consumer with Laptop Bookings and total laptops” - click on start report.
4. Customize your report
5. Add fields from left pane as shown below

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



8. 

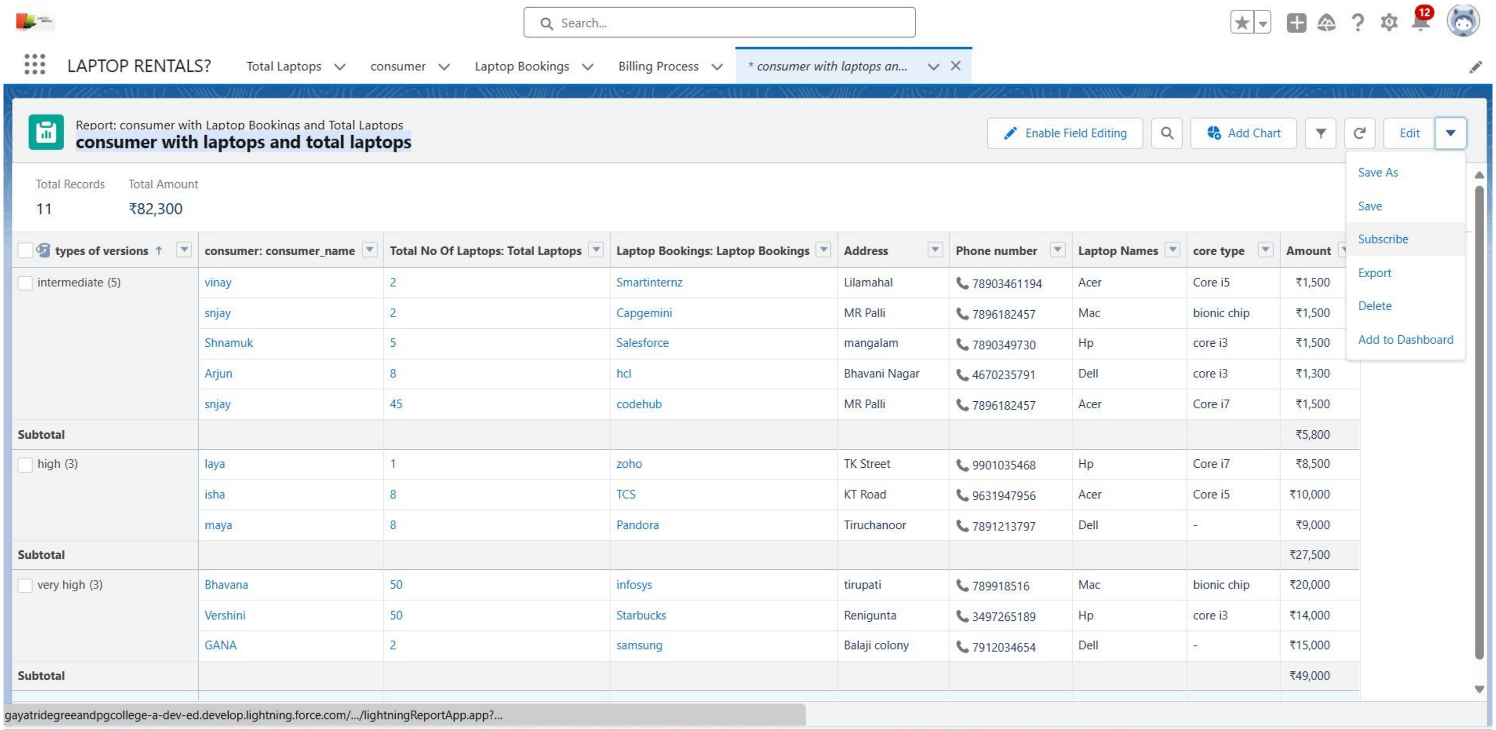
9. Click apply it.
10. Save the Report
11. Name: consumer with laptops and total laptops

12. 

types of versions ↑	consumer: consumer_name	Total No Of Laptops: Total Laptops	Laptop Bookings: Laptop Bookings	Address	Phone number	Laptop Names	core type	Amount
intermediate (5)	vinay	2	Smartinternz	Lilamahal	78903461194	Acer	Core i5	₹1,500
	snjay	2	Capgemini	MR Palli	7896182457	Mac	bionic chip	₹1,500
	Shnamuk	5	Salesforce	mangalam	7890349730	Hp	core i3	₹1,500
	Arjun	8	hcl	Bhavani Nagar	4670235791	Dell	core i3	₹1,300
	snjay	45	codehub	MR Palli	7896182457	Acer	Core i7	₹1,500
Subtotal								₹5,800
high (3)	laya	1	zoho	TK Street	9901035468	Hp	Core i7	₹8,500
	isha	8	TCS	KT Road	9631947956	Acer	Core i5	₹10,000
	maya	8	Pandora	Tiruchanoor	7891213797	Dell	-	₹9,000
Subtotal								₹27,500
very high (3)	Bhavana	50	infosys	tirupati	789918516	Mac	bionic chip	₹20,000
	Vershini	50	Starbucks	Renigunta	3497265189	Hp	core i3	₹14,000
	GANA	2	samsung	Balaji colony	7912034654	Dell	-	₹15,000
Subtotal								₹49,000

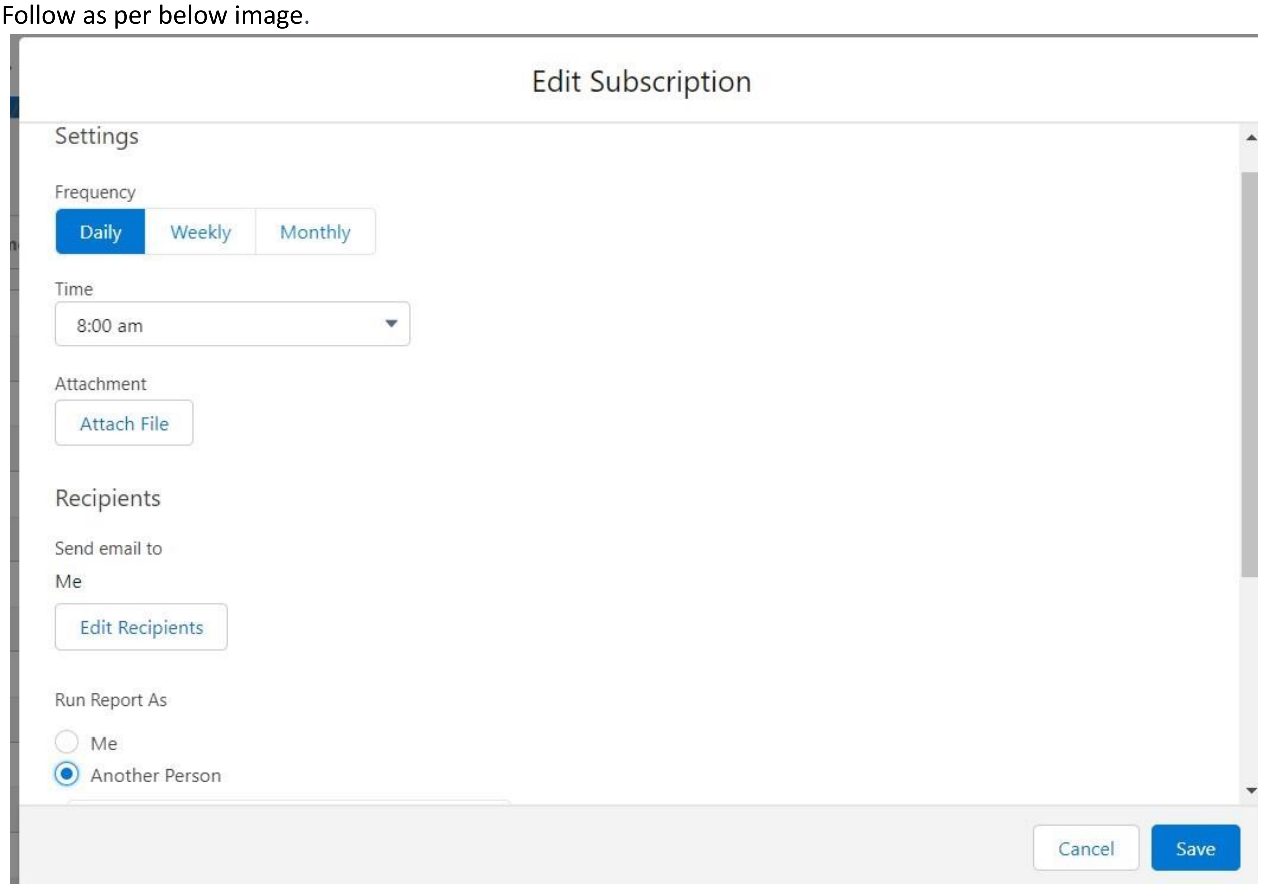
Sharing Report To Owner

Click edit drop down and select subscribe option

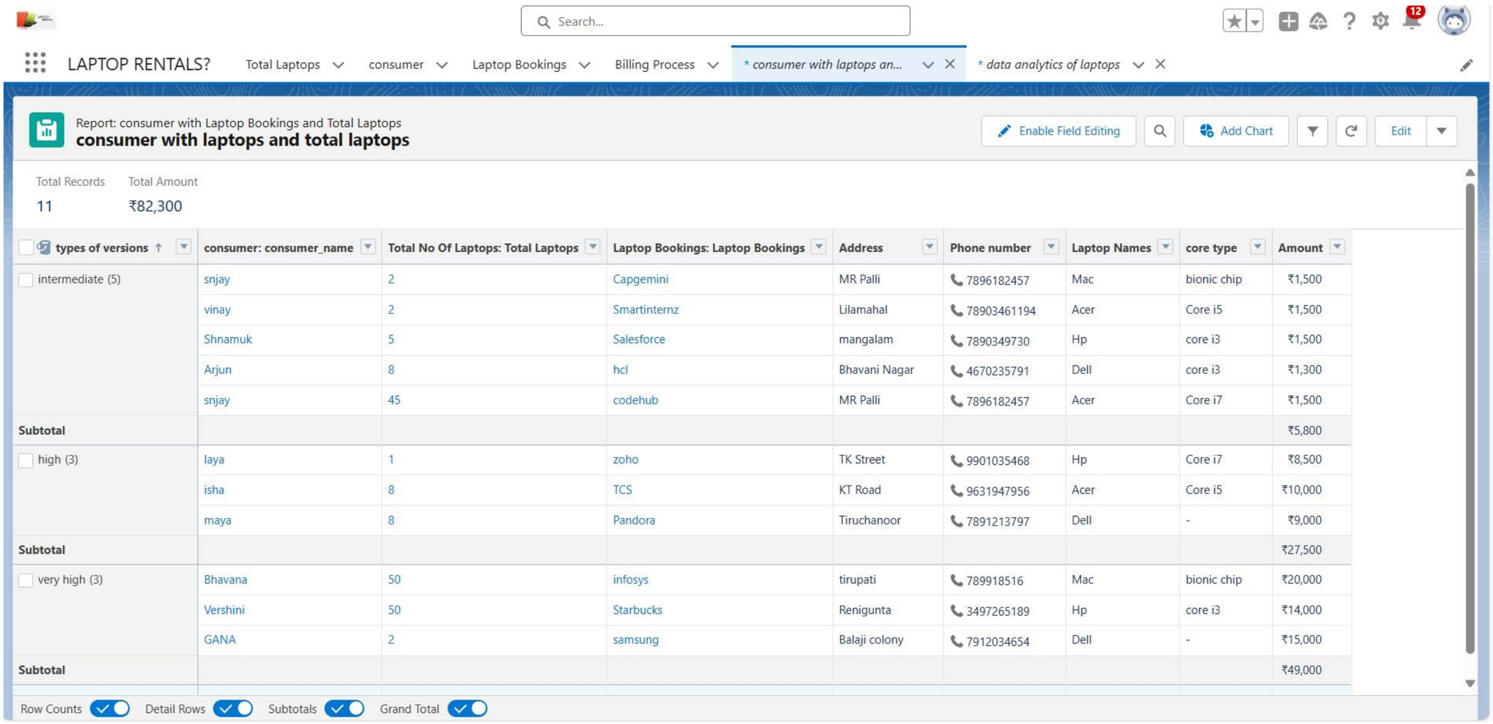


types of versions	consumer: consumer_name	Total No Of Laptops: Total Laptops	Laptop Bookings: Laptop Bookings	Address	Phone number	Laptop Names	core type	Amount
intermediate (5)	vinay	2	Smartinternz	Lilamahal	78903461194	Acer	Core i5	₹1,500
	snjay	2	Capgemini	MR Palli	7896182457	Mac	bionic chip	₹1,500
	Shnamuk	5	Salesforce	mangalam	7890349730	Hp	core i3	₹1,500
	Arjun	8	hcl	Bhavani Nagar	4670235791	Dell	core i3	₹1,300
	snjay	45	codehub	MR Palli	7896182457	Acer	Core i7	₹1,500
Subtotal								₹5,800
high (3)	laya	1	zoho	TK Street	9901035468	Hp	Core i7	₹8,500
	isha	8	TCS	KT Road	9631947956	Acer	Core i5	₹10,000
	maya	8	Pandora	Tiruchanoor	7891213797	Dell	-	₹9,000
Subtotal								₹27,500
very high (3)	Bhavana	50	infosys	tirupati	789918516	Mac	bionic chip	₹20,000
	Vershini	50	Starbucks	Renigunta	3497265189	Hp	core i3	₹14,000
	GANA	2	samsung	Balaji colony	7912034654	Dell	-	₹15,000
Subtotal								₹49,000

2. Follow as per below image.



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. **Result:**



types of versions	consumer: consumer_name	Total No Of Laptops: Total Laptops	Laptop Bookings: Laptop Bookings	Address	Phone number	Laptop Names	core type	Amount
intermediate (5)	snjay	2	Capgemini	MR Palli	7896182457	Mac	bionic chip	₹1,500
	vinay	2	Smartinternz	Lilamahal	78903461194	Acer	Core i5	₹1,500
	Shnamuk	5	Salesforce	mangalam	7890349730	Hp	core i3	₹1,500
	Arjun	8	hcl	Bhavani Nagar	4670235791	Dell	core i3	₹1,300
	snjay	45	codehub	MR Palli	7896182457	Acer	Core i7	₹1,500
Subtotal								₹5,800
high (3)	laya	1	zoho	TK Street	9901035468	Hp	Core i7	₹8,500
	isha	8	TCS	KT Road	9631947956	Acer	Core i5	₹10,000
	maya	8	Pandora	Tiruchanoor	7891213797	Dell	-	₹9,000
Subtotal								₹27,500
very high (3)	Bhavana	50	infosys	tirupati	789918516	Mac	bionic chip	₹20,000
	Vershini	50	Starbucks	Renigunta	3497265189	Hp	core i3	₹14,000
	GANA	2	samsung	Balaji colony	7912034654	Dell	-	₹15,000
Subtotal								₹49,000

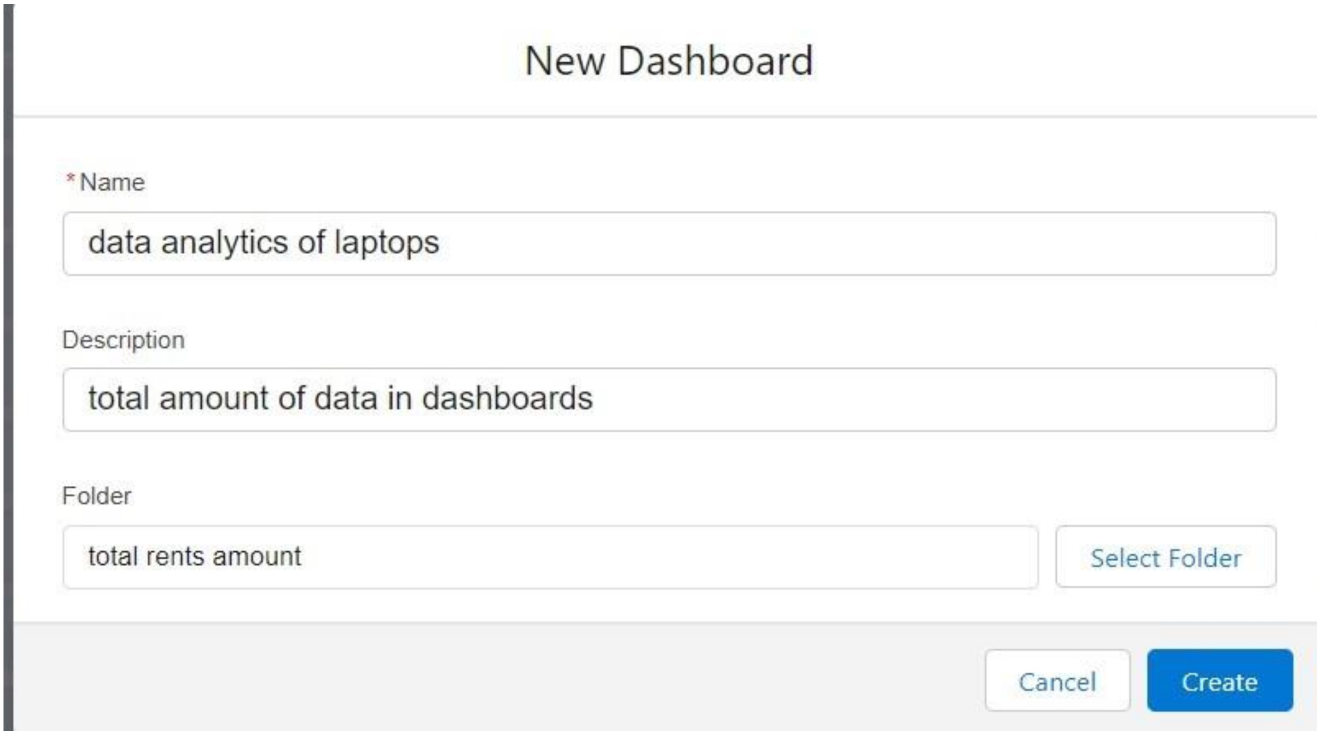
Milestone-13: Dashboards

Create Dashboard Folder

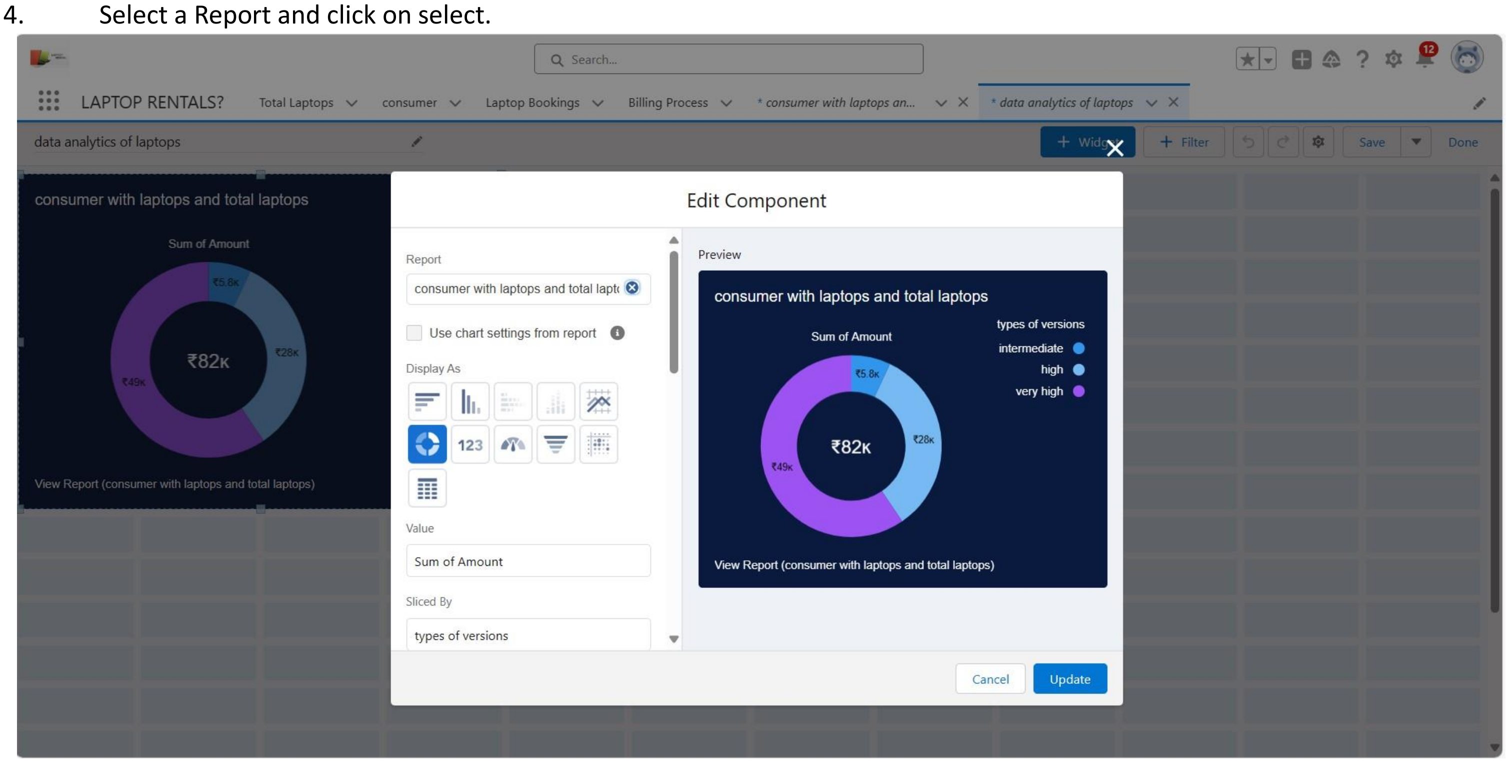
1. Click on the app launcher and search for the dashboard.
2. Click on the dashboard tab.
3. Click the new folder, give the folder label as “total rent amount”.
4. Folder unique names will be auto populated.
5. Click save.

Create Dashboard

1. Go to the app - click on the Dashboards tabs.
2. Give a Name and select the folder that was created, and click on create.

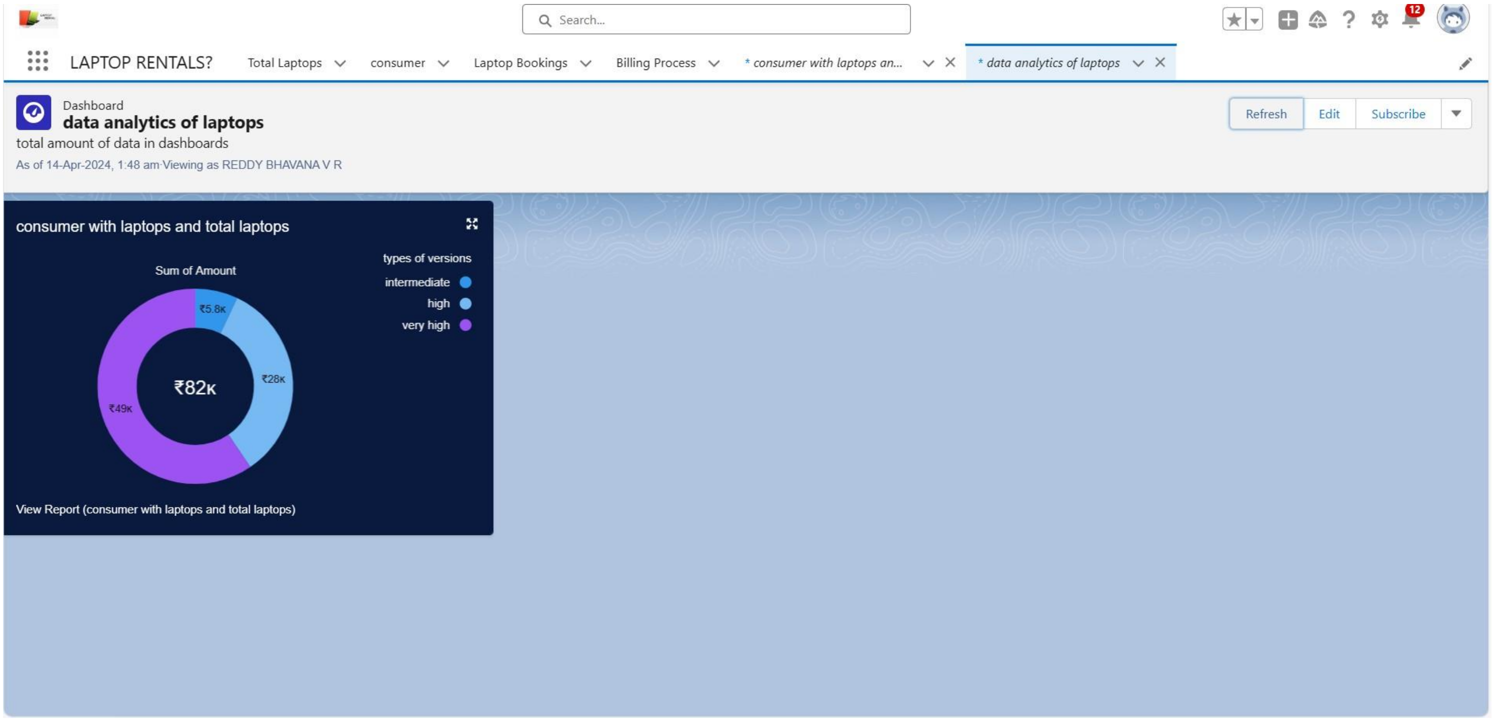


3. Select add component.
4. Select a Report and click on select.



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

Result:


Search...
LAPTOP RENTALS?
Total Laptops
consumer
Laptop Bookings
Billing Process
* consumer with laptops an...
* data analytics of laptops
Dashboard
data analytics of laptops
total amount of data in dashboards
As of 14-Apr-2024, 1:48 am·Viewing as REDDY BHAVANA V R
Refresh
Edit
Subscribe
consumer with laptops and total laptops
Sum of Amount
types of versions
intermediate
high
very high
₹5.8K
₹28K
₹82K
₹49K
View Report (consumer with laptops and total laptops)

THE END