

PROJECT REPORT ON
A CRM APPLICATION FOR LAPTOP RENTALS
(ADMIN) - (Long-term)

Introduction: The project aim is to provide real-time knowledge for all the students who have basic knowledge of Salesforce and Looking for a real-time project. This project will also help to those professionals who are in cross-technology and wanted to switch to Salesforce with the help of this project they will gain knowledge and can include into their resume as well.

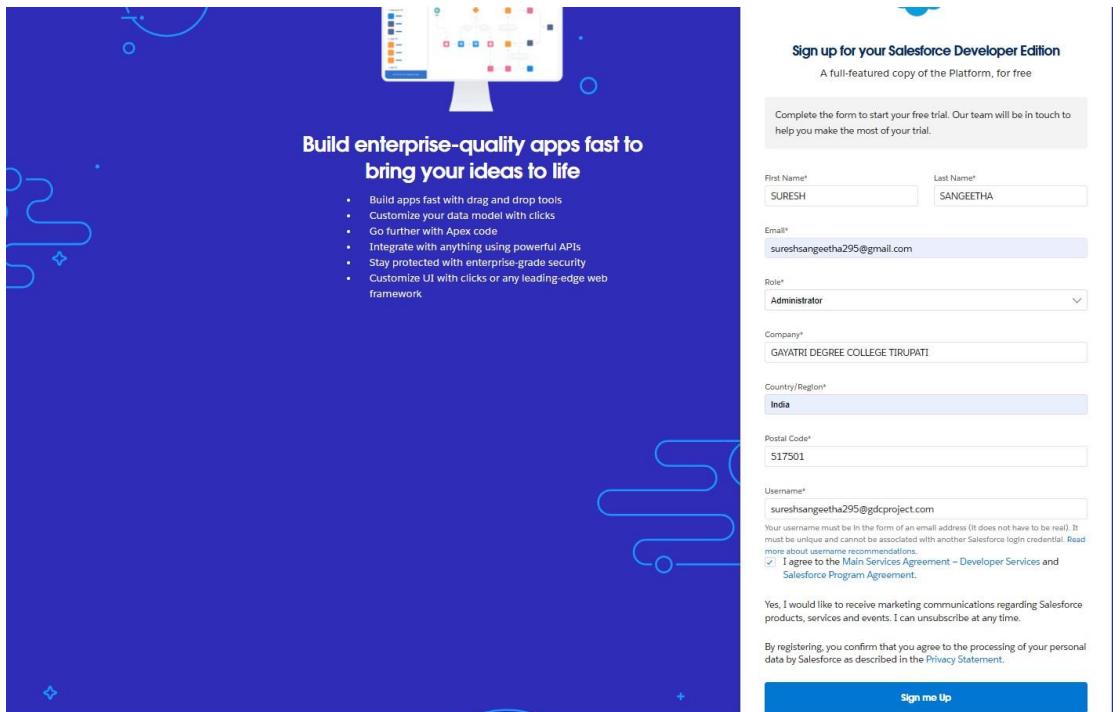
Milestone 01: Create Salesforce Org

Go to developers.salesforce.com/Signup

Click on sign up.

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

1. First name & Last name – SURESH SANEEETHA
2. Email –sureshsangeetha295@gmail.com
3. Role: Developer
4. Company: GAYATRI DEGREE COLLEGE - TIRUPATI
5. County: India
6. Postal Code: 517501
7. Username: longtermgdcproject@2024.com



The screenshot shows the sign-up form for the Salesforce Developer Edition. The background is blue with abstract white line art. At the top right, it says "Sign up for your Salesforce Developer Edition" and "A full-featured copy of the Platform, for free". Below that is a sub-headline: "Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial." The form fields are as follows:

First Name*	Last Name*
SURESH	SANGEETHA
Email*	sureshsangeetha295@gmail.com
Role*	Administrator
Company*	GAYATRI DEGREE COLLEGE TIRUPATI
Country/Region*	India
Postal Code*	517501
Username*	sureshsangeetha295@gdcproject.com

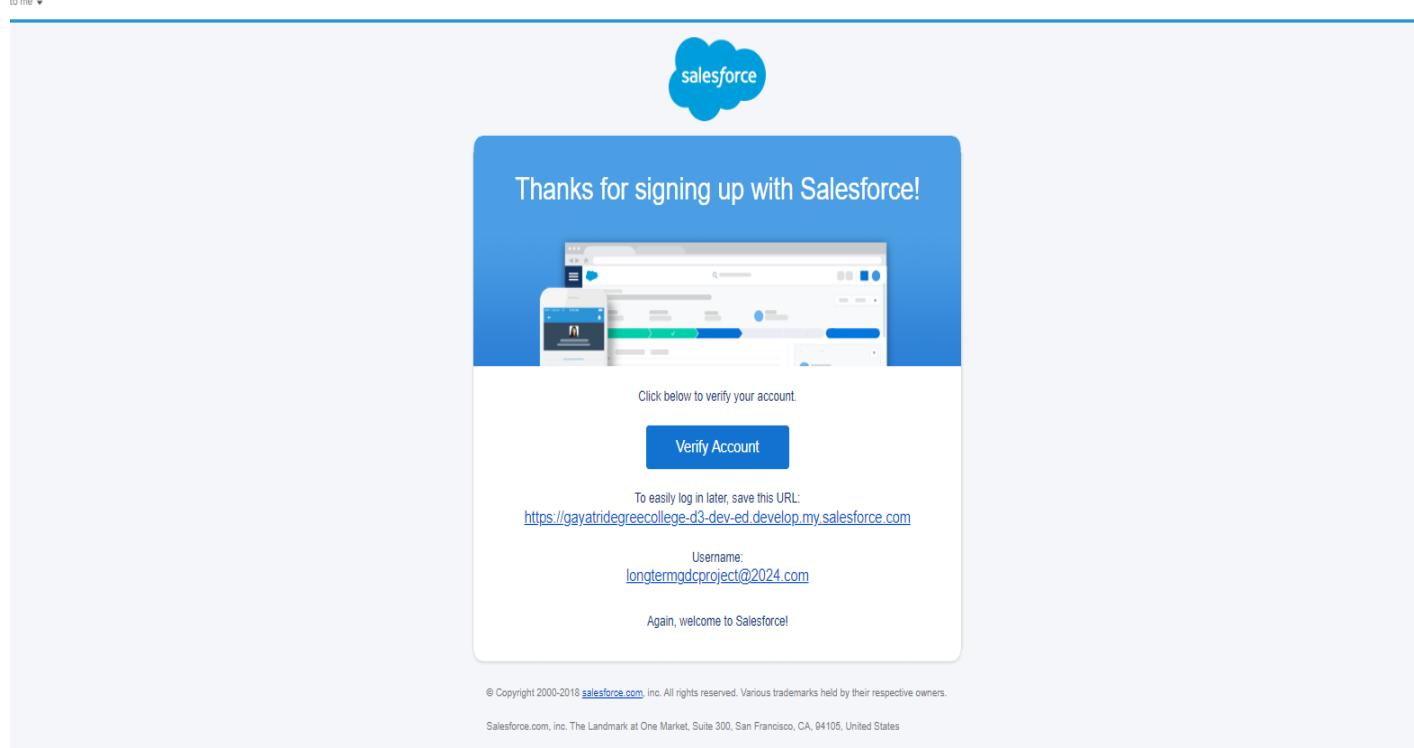
Below the form, there is a note about username requirements: "Your username must be in the form of an email address (it does not have to be real). It must be unique and cannot be associated with another Salesforce login credential. Read more about username recommendations." There is a checked checkbox for "I agree to the Main Services Agreement – Developer Services and Salesforce Program Agreement." At the bottom, there is a checkbox for "Yes, I would like to receive marketing communications regarding Salesforce products, services and events. I can unsubscribe at any time." A "Sign me Up" button is at the very bottom right.

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

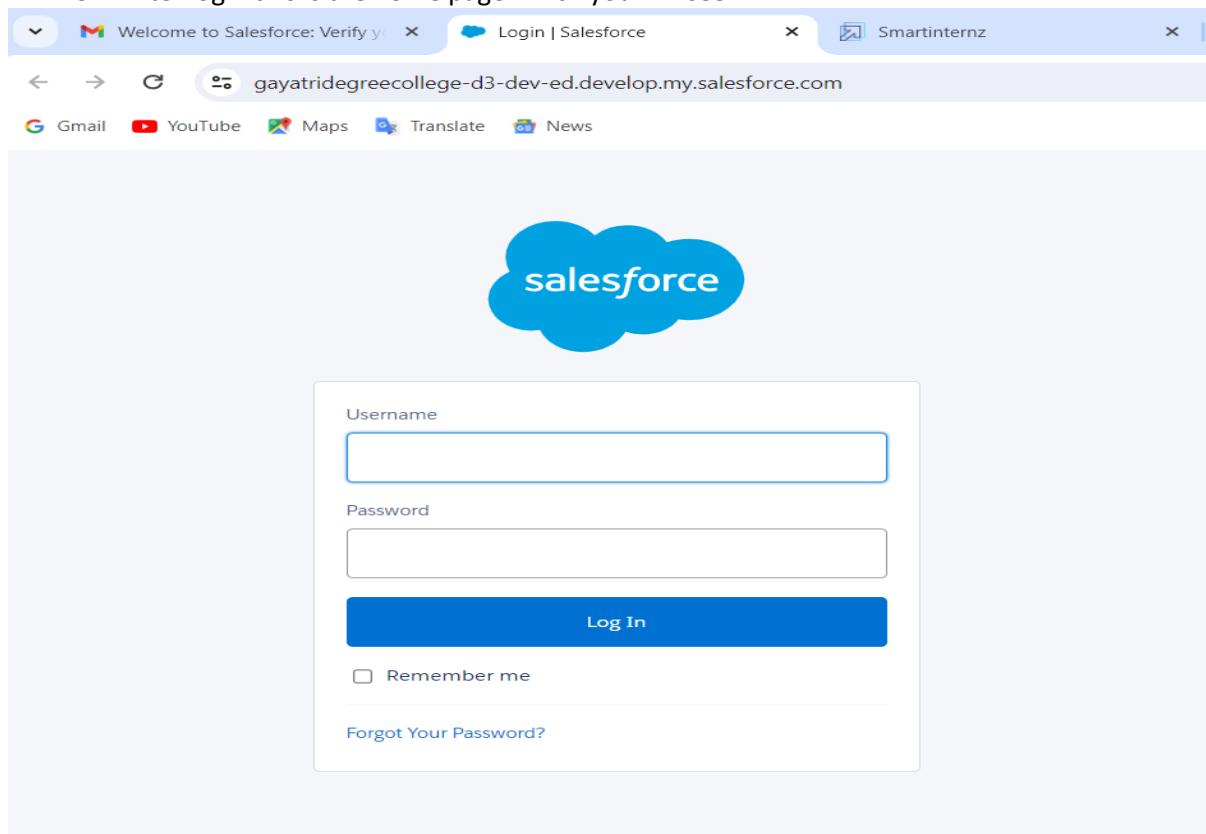
developer@salesforce.com <developer@salesforce.com>
to me ▾

Wed, 27 Mar, 20:51 [★](#) [✉](#) [↶](#) [☰](#)



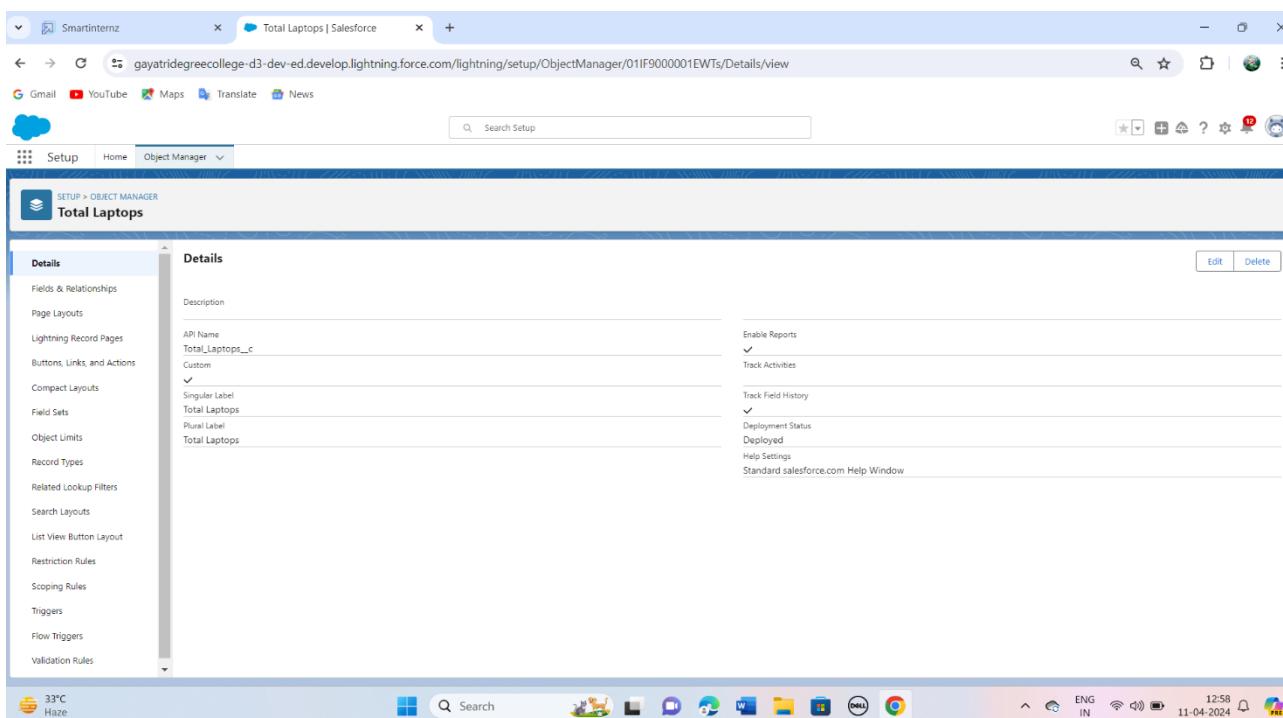
Login to Your Salesforce Account

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.



Object – Total Laptops

1. From the setup page - Click on Object Manager - Click on Create - Click on Custom Object
- 1.1 Enter the label name- Total Laptops.
2. Plural label name- Total Laptops
3. Enter Record Name Label and Format as follows:
4. Record Name -Total Laptops
5. Data Type - Text
6. Click on Allow reports, Allow search and Track Field History
7. Allow search
8. Click on Save



Object – Consumer

1. From the setup page - Click on Object Manager - Click on Create - Click on Custom Object
- 1.1 Enter the label name- Consumer
2. Plural label name- Consumers
3. Enter Record Name Label and Format as follows:
4. Record Name – consumer_name
5. Data Type - Name
6. Click on Allow reports, Allow search and Track Field History
7. Allow search
8. Click on Save

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address_c	Text Area(255)		
consumer_status	consumer_status_c	Picklist		
consumer_name	Name	Text(80)		
Created By	CreatedById	Lookup(User)		✓
Email	Email_c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		
Phone number	Phone_number_c	Phone		

Object – Laptop Bookings

- From the setup page - Click on Object Manager - Click on Create - Click on Custom Object
- Enter the label name- Laptop Bookings
- Plural label name- Laptop Bookings
- Enter Record Name Label and Format as follows:
- Record Name – Laptop_bookings
- Data Type - Name
- Click on Allow reports, Allow search and Track Field History
- Allow search
- Click on Save

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount_c	Currency(18, 0)		
Core Type	Core_c	Picklist	Laptop Name	
Created By	CreatedById	Lookup(User)		
Email	Email_c	Email		
how many months	how_many_months_c	Lookup(consumer)		
Laptop Booking	Laptop_Booking_c	Picklist		
Laptop Bookings	Name	Text(80)		
Laptop Name	Laptop_Name_c	Picklist		
Laptops Available	Laptops_Available_c	Formula (Number)		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name_c	Master-Detail(consumer)		
Name	Names_c	Lookup(consumer)		
Total No Of Laptops	Total_No_Of_Laptops_c	Master-Detail(Total Laptops)		

Object – Billing Process

1. From the setup page - Click on Object Manager - Click on Create - Click on Custom Object
- 1.1 Enter the label name- Billing Process
2. Plural label name- Billing Processes
3. Enter Record Name Label and Format as follows:
4. Record Name – Billing_processes
5. Data Type - Name
6. Click on Allow reports, Allow search and Track Field History
7. Allow search
8. Click on Save

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes tabs for Smartintenz, Billing Process | Salesforce, and a search bar. Below the navigation is a toolbar with various icons. The main content area is titled "Billing Process" under "SETUP > OBJECT MANAGER". On the left, there's a sidebar with tabs like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, etc. The "Fields & Relationships" tab is selected, displaying a table with 7 items. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data in the table is as follows:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount_c	Formula (Number)		
Billing ProcessName	Name	Text(80)		
Created By	CreatedBy	Lookup(User)		
Laptop Booking	Laptop_Booking_c	Lookup(Laptop Bookings)		
Last Modified By	LastModifiedBy	Lookup(User)		
Name	Name_c	Master-Detail(consumer)		
Payment Mode	Payment_Mode_c	Picklist		

Tabs:

Milestone – 03: Tabs

Tabs in Salesforce help users view the information at a glance. It displays the data of objects and other web content in the application.

There are mainly 4 types of tabs:

- a. Standard Object Tabs: Standard object tabs display data related to standard objects
- b. Custom Object Tabs: Custom object tabs display data related to custom objects.
- c. Web Tabs: Web Tabs display any external Web-based application or Web page in a Salesforce tabs.
- d. Visual force Tabs: Visual force Tabs display data from a Visual force Page

Tabs: Creating a custom tab

1. Go to setup page - type Tabs in Quick Find bar - click on tabs - New (under custom object tab)
2. Select Object (Total Laptops) - Select the tab style - Next (Add to profiles page) keep it as default - Next (Add to Custom App) uncheck the include tab.
3. Make sure that the Append tab to users' existing personal customizations is checked.

4. Click save.

Tab Style Selector

Create your own style

Hide styles which are used on other tabs

	Airplane		Alarm clock		Apple		Balls
	Bank[1]		Bell		Big top		Boat[1]
	Books		Bottle		Box		Bridge
	Building		Building Block		Caduceus		Camera
	Can		Car		Castle		CD/DVD
	Cell phone		Chalkboard		Chess piece		Chip
	Circle		Compass		Computer		Credit card
	CRT TV		Cup		Desk[1]		Diamond
	Dice		Factory		Fan		Flag
	Form		Gears		Globe		Guitar
	Hammer		Hands		Handsaw		Headset
	Heart[1]		Helicopter		Hexagon		Highway Sign
	Hot Air Balloon		Insect		IP Phone		Jewel
	Keys		Laptop		Leaf		Lightning

Save **Cancel**

Step 3. Add to Custom Apps

Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.

Custom App

Platform (standard__Platform)	<input type="checkbox"/> Include Tab
Sales (standard__Sales)	<input type="checkbox"/>
Service (standard__Service)	<input type="checkbox"/>
Marketing (standard__Marketing)	<input type="checkbox"/>
Sample Console (standard__ServiceConsole)	<input type="checkbox"/>
High Volume Customer Portal User	<input type="checkbox"/>
Authenticated Website User	<input type="checkbox"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>

Analytics Studio (standard__Insights)

Sales Console (standard__LightningSalesConsole)

Service Console (standard__LightningService)

Sales (standard__LightningSales)

Lightning Usage App (standard__LightningInstrumentation)

Digital Experiences (standard__SalesforceCMS)

Queue Management (standard__QueueManagement)

Bolt Solutions (standard__LightningBolt)

Data Manager (standard__DataManager)

Salesforce Scheduler Setup (standard__LightningScheduler)

Append tab to users' existing personal customizations

Previous **Save** **Cancel**

Activity 2: Creating Remaining Tabs

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

The screenshot shows the Salesforce Setup interface with the 'Tabs' section selected. The 'Custom Tabs' section is expanded, showing the 'Custom Object Tabs' category. Inside this category, four tabs are listed: 'Billing Process' (with an alarm clock icon), 'consumers' (with a globe icon), 'Laptop Bookings' (with a building block icon), and 'Total Laptops' (with a books icon). Each tab entry includes an 'Edit | Del' link. Below this, there are sections for 'Web Tabs', 'Visualforce Tabs', 'Lightning Component Tabs', and 'Lightning Page Tabs', all of which currently show 'No [tab type] have been defined'.

Milestone – 04: Lightning app

Apps in Salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo, and a particular set of tabs. The simplest app usually has just two tabs. There are two types of app –

1. Standard App: Standard apps come with every occurrence of Salesforce as default. Many features like Sales, Marketing, Community, call center content, Salesforce chatter, App Launcher, etc are present in it. Note: The description, Logo, and Label of standard app cannot be altered.
2. Custom Apps: Custom apps are created according to need of user. Custom Apps are made by using standard and custom tabs together.

Note: Logos for Custom Apps can be changed

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

The screenshot shows the 'App Manager' page in the Salesforce setup. A red box highlights the 'New Lightning App' button at the top right. The main area lists several apps: Analytics Studio, App Launcher, Data Manager, and others. Each app entry includes a 'Connected' status indicator. At the bottom, a table provides a detailed view of the apps, showing columns for 'App Name', 'Description', 'Last Modified', 'App Type', and 'Status'.

App Name	Description	Last Modified	App Type	Status
Analytics Studio	Build CRM Analytics dashboards and reports	04/12/2022, 10:10 am	Classic	Connected
App Launcher	App Launcher tabs	04/12/2022, 10:10 am	Classic	Connected
Data Manager	Use Data Manager to view limits, monitor usage, and manage recipes	04/12/2022, 10:10 am	Lightning	Connected
Chatter	Discover and manage business institutions designed for your industry	04/12/2022, 10:10 am	Lightning	Connected
Chatter Mobile for BlackBerry	Chatter_Mobile_Berry	28/12/2022, 4:54 pm	Connected (Managed)	Connected (Managed)
College Management System	Radteam	08/12/2022, 4:19 pm	Lightning	Connected
Community	Community	04/12/2022, 10:10 am	Classic	Connected
Content	Content	04/12/2022, 10:10 am	Classic	Connected

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.

App Details

App Name (Required)

Developer Name

Description

App Branding

Image (Required)

Primary Color Hex Value (Required)

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

App Launcher Preview

Next

3.Upload a photo that is related to your app.

4.To Add Navigation Items

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

New Lightning App

Navigation Items

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

Available Items

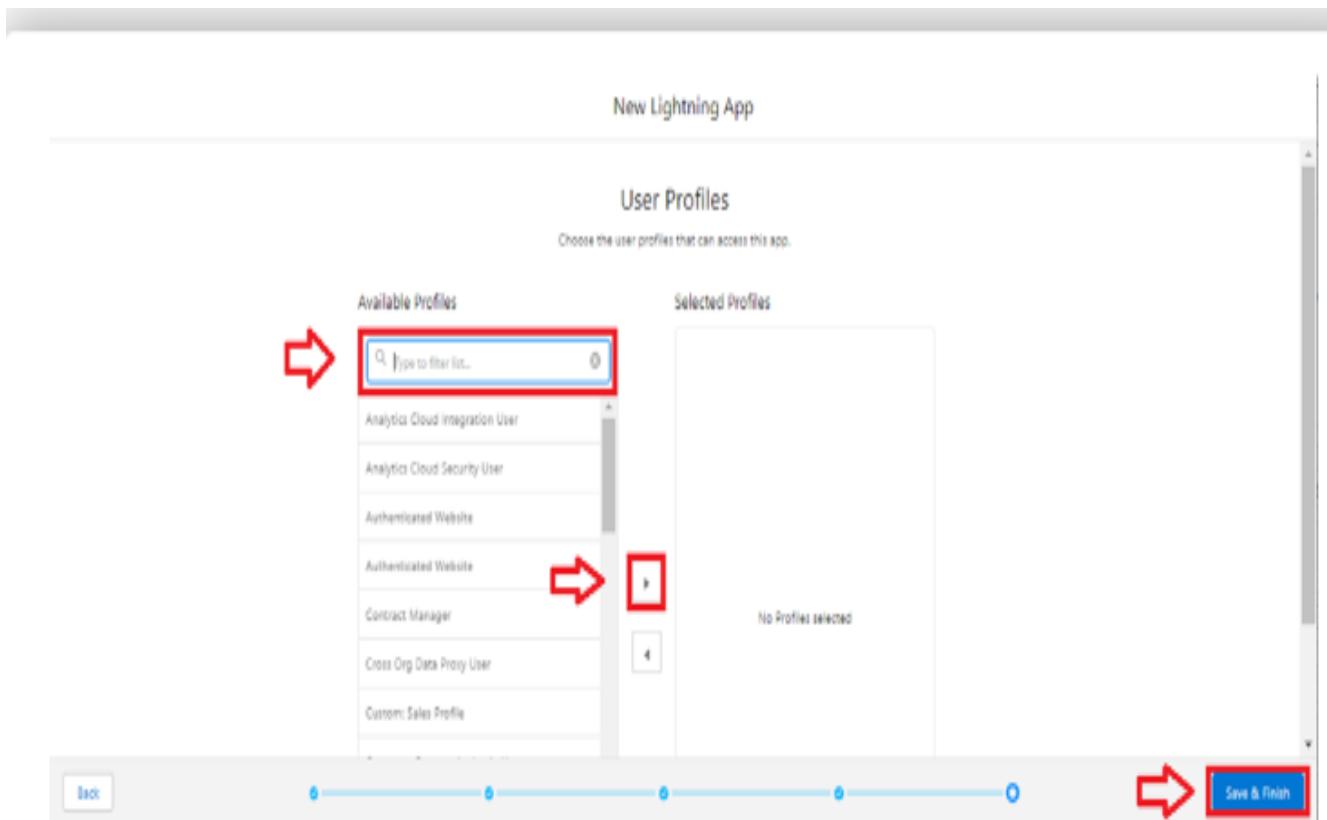
Type to filter list...

Selected Items

No items selected

Back 0 -> 0 -> 0 Next

5. To Add User Profiles



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

Milestone – 05: fields and relationship

Fields And Relationship

Fields - Fields store data values that are required for a particular object in a record . An object relationship in Salesforce is a two-way association between two objects. Relationships are created by creating custom relationship fields on an object. This is done so that when users view records, they can also see and access

Types of Fields:

1. Standard Fields
2. Custom Fields

Standard Fields:

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

→Created By.

→Owner.

- Last Modified.
- Field Made During object Creation.

Custom Fields:

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

Creating The Field In Consumer Object

1. 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

Object Name	Object Label	Type	Created Date
Credential Stuffing Event Store	CredentialStuffingEventStore	Standard Object	
Credit Memo	CreditMemo	Standard Object	
Credit Memo Invoice Application	CreditMemoInvoiceApplication	Standard Object	
Credit Memo Line	CreditMemoLine	Standard Object	
Customer	Customer	Standard Object	
Customer__t	Customer__t	Custom Object	12/06/2023
D&B Company	DandBCompany	Standard Object	
Data Use Legal Basis	DataUseLegalBasis	Standard Object	
Data Use Purpose	DatausePurpose	Standard Object	

2. Now click on “Fields & Relationships” - New
3. Select Data Type as a “Phone”
4. Click on next
5. 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.

Step 2. Enter the details		Step 2 of 4
Field Label	phone number	
Field Name	phone number	
Description		
Help Text		
Required	<input checked="" type="checkbox"/> Always require a value in this field in order to save a record	
Auto add to custom report type	<input checked="" type="checkbox"/> Add this field to existing custom report types that contain this entity	
Default Value	Phone Formula Field	
Use formula syntax. Available field and global values: \$P{parameter}, \$V{variable}, \$L{label}, \$A{account}, \$C{contact}, \$O{opportunity}, \$R{record}, \$T{task}, \$U{user}, \$C{customobject}, \$F{customfield}, \$M{custommeta}. To reference a field from a Custom Metadata Type record use \$CustomMetadataType__r.getRecord(\$Field__c)		

2. 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.

The screenshot shows the 'New Custom Field' page in the Salesforce Setup. The object is 'consumer'. The field label is 'Email', and the field name is also 'Email'. The 'Required' checkbox is checked. The 'Add this field to existing custom report types that contain this entity' checkbox is also checked. Other settings like 'Unique' and 'External ID' are unchecked.

3. 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' page in the Salesforce Setup. The object is 'consumer'. The field label is 'Address', and the field name is also 'Address'. The 'Required' checkbox is checked. The 'Add this field to existing custom report types that contain this entity' checkbox is also checked. Other settings like 'Unique' and 'External ID' are unchecked.

4. 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
 1. Student
 2. Employee
 3. Others
 - Select required
 - Field Name :It's gets auto generated
 - Click on Next - Next - Save and new.

SETUP > OBJECT MANAGER
consumer

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

Field Label: consumer status

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

Field Name: Consumer_Status

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

Creating The Field In Laptops Bookings Object

1. 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

SETUP > OBJECT MANAGER
Laptop Bookings

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Field Label: Laptop names

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

Field Name: Laptop_type

Description:

Help Text:

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

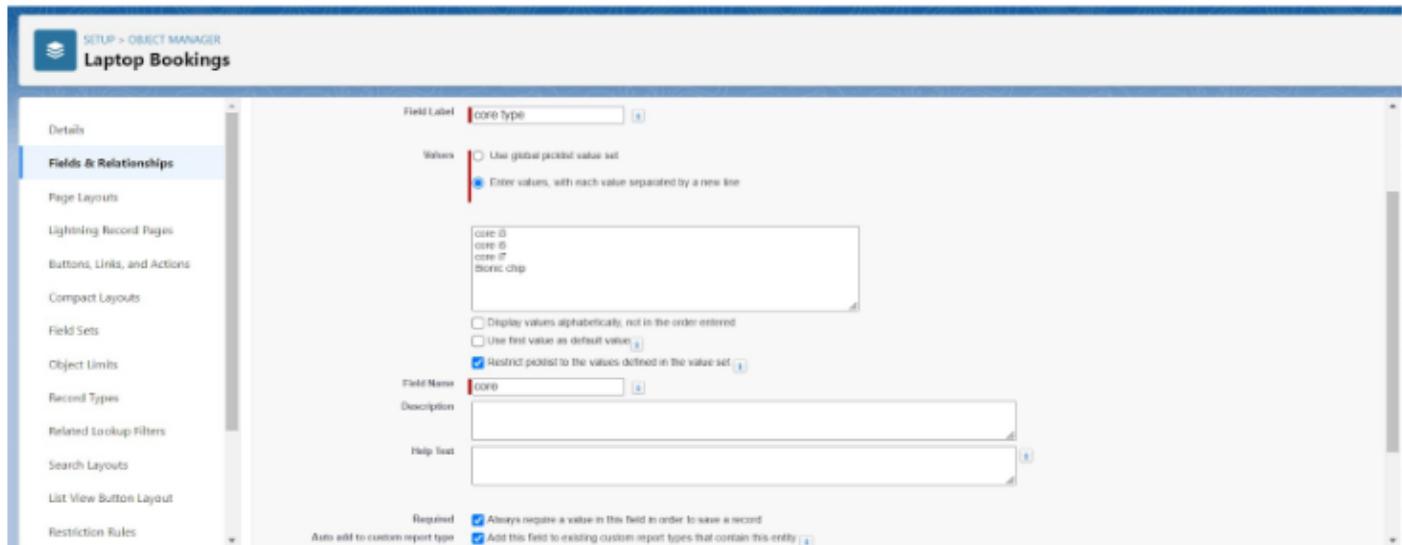
Auto add to custom report type: Add this field to existing custom report types that contain this entity

5. Select required
6. Click on Next -Next -Save and newClick on Next

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

To create fields & relationship to an object:

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



- 5.Select required
- 6.Click on Next - Next - Save and newClick on Next

NOTE:-

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.

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

Click save.

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 “Lookup Relationship”
4. Click on Next
5. Click on the Related to drop down and Select the “consumer” object and click on Next
6. Fill the Above as following:
 - Change the Field Label: Name
 - Field Name :It's gets auto generated
7. Click on Next - Next - Save and new.

To create fields in an object:

- 1.Go to setup -click on Object Manager - type object name(Laptop Booking) in the 2.search bar - click on the object.
 - 3.Now click on “Fields & Relationships” - New
 - 4.Select Data Type as a “Currency”
 - 5.Click on Next
- Fill the Above as following:
- Field Label: Amount

- Length: (18,0)
- Field Name :It's gets auto generated
- Click on Next - Next - Save and new

Step 2: Enter the details

Field Label: Amount

Length: 18

Decimal Places: 0

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 entity

Default Value:

Step 2 of 4

Previous Next Cancel

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”

Click on Next

Laptop Bookings

New Relationship

Step 2: Choose the related object

Related To: laptop

Step 2 of 8

Previous Next Cancel

Click on the Related to drop down and Select the “Total Laptops” object and click on Next

- Fill the Above as following:
- Change the Field Label: Total No Of Laptops
- Field Name :It's gets auto generated
- Click on Next - Next -Save and new.

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

To create fields & relationship to an object:

8. Go to setup - click on Object Manager - type object name(Laptop Booking) in the search bar –
9. click on the object.
10. Now click on “Fields & Relationships” - New
11. Select Data Type as a “Email”
12. 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.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Currency(15, 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)		✓

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

Step 1. Choose the field type

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

Data Type

Rollup Summary

Select one of the data types below.

None Selected

Auto Number

Formula

Rollup Summary

Lookup Relationship

Master-Detail Relationship

The screenshot shows the 'New Custom Field' setup page for the 'Total laptops' object. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The main area is titled 'Step 1. Choose the Field type'. It asks to specify the type of information the custom field will contain. Under 'Data Type', the 'Roll Up Summary' option is selected. A detailed description explains that it's a read-only field displaying the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list. Other options shown include 'None Selected', 'Auto Number', 'Formula', 'Lookup Relationship', and 'Master-Detail Relationship'.

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', both of which are currently empty. A checkbox 'Auto add to custom report type' is checked, and another checkbox 'Add this field to existing custom report types that contain this entity' is also checked. Navigation buttons 'Previous', 'Next', and 'Cancel' are at the bottom right.

- Click on Next

6. Select the Laptop Bookings in the Summarized Object

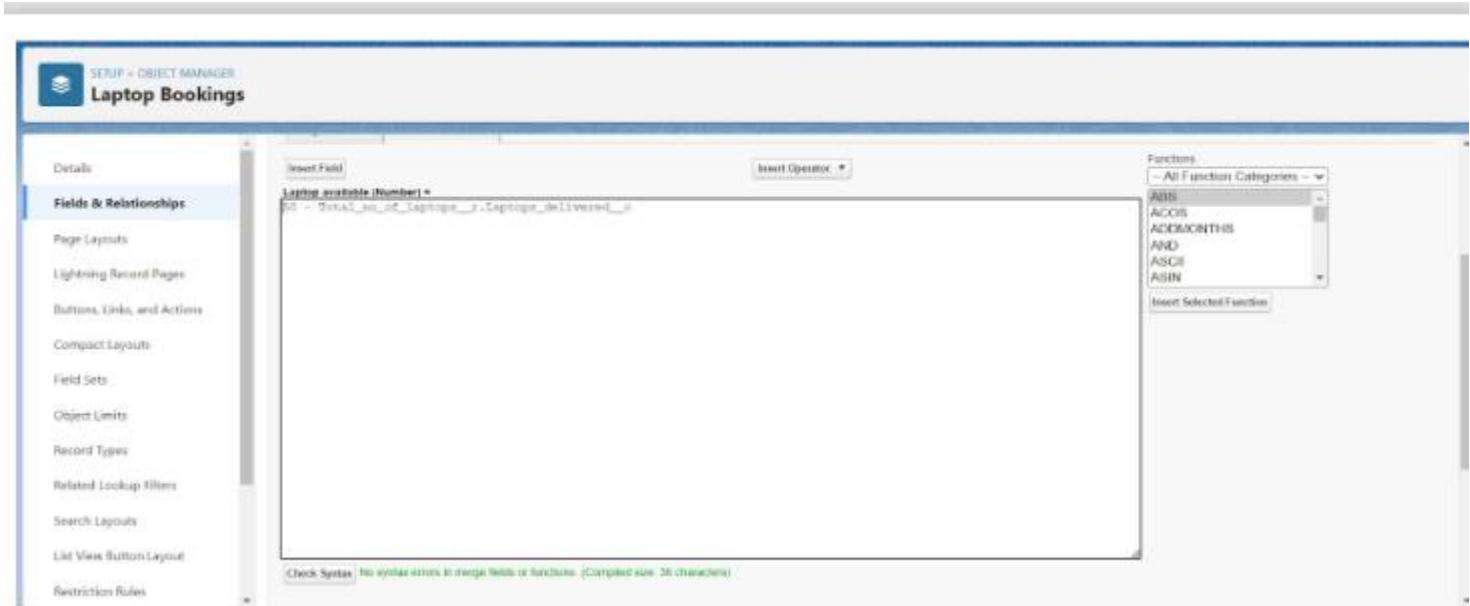
7. Select the count Radio button in the select Roll-up Type

The screenshot shows 'Step 3. Define the summary calculation'. In the 'Select Object to Summarize' section, 'Laptop Bookings' is chosen as the Master Object. In the 'Select Roll-up Type' section, the 'COUNT' radio button is selected. Below it, there are other options: 'SUM', 'MIN', 'MAX', and 'NONE'. A note says 'ROLL UP Aggregate - Average'. At the bottom, under 'Filter Criteria', there are two checkboxes: 'All records should be included in the calculation' and 'Only records meeting certain criteria should be included in the calculation'. Navigation buttons 'Previous', 'Next', and 'Cancel' are at the bottom right.

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.

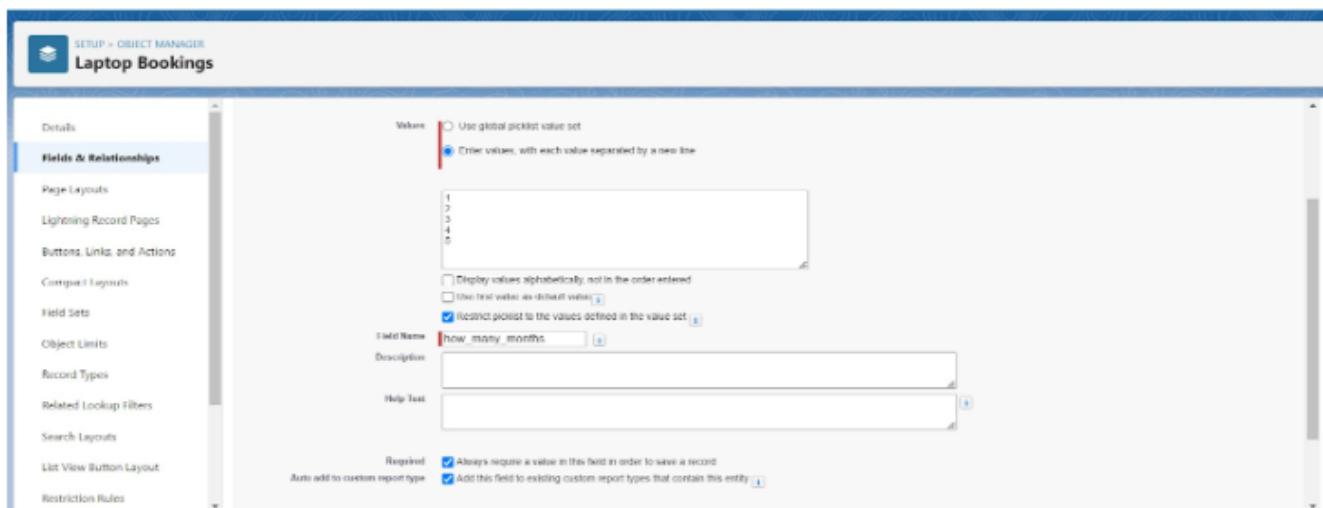
2. Now click on “Fields & Relationships” - New
3. Select Data type as a “Formula” and Click on Next
4. Fill the Above as following:
 - Field Label: Laptops Available
 - Field Name : It's gets auto generated
 - Select the Formula Return Type as “Number”
 - Select the Decimal places as “0” and Click on 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:

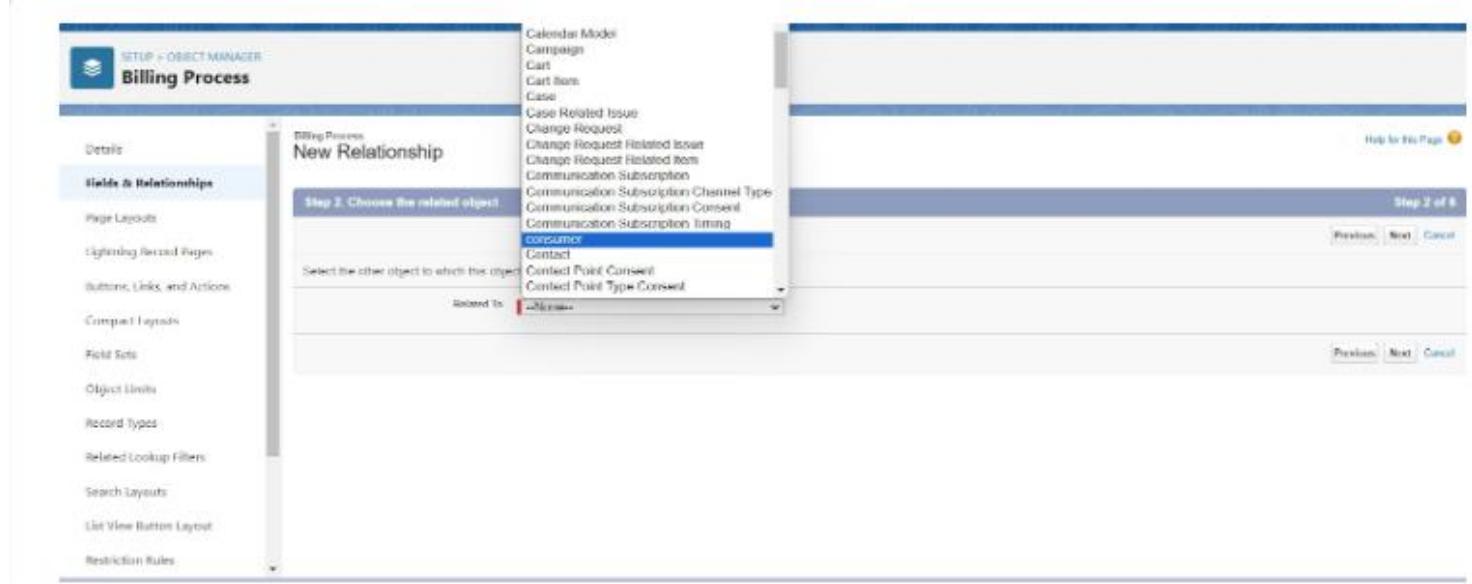
- 1.Go to setup - click on Object Manager - type object name(Laptop Booking) in the search bar - click on the object.
- 3.Now click on “Fields & Relationships” -New
- 4.Select Data Type as a “picklist”
5. Picklist values are 1.2.3.4.5
6. Click and save it.



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



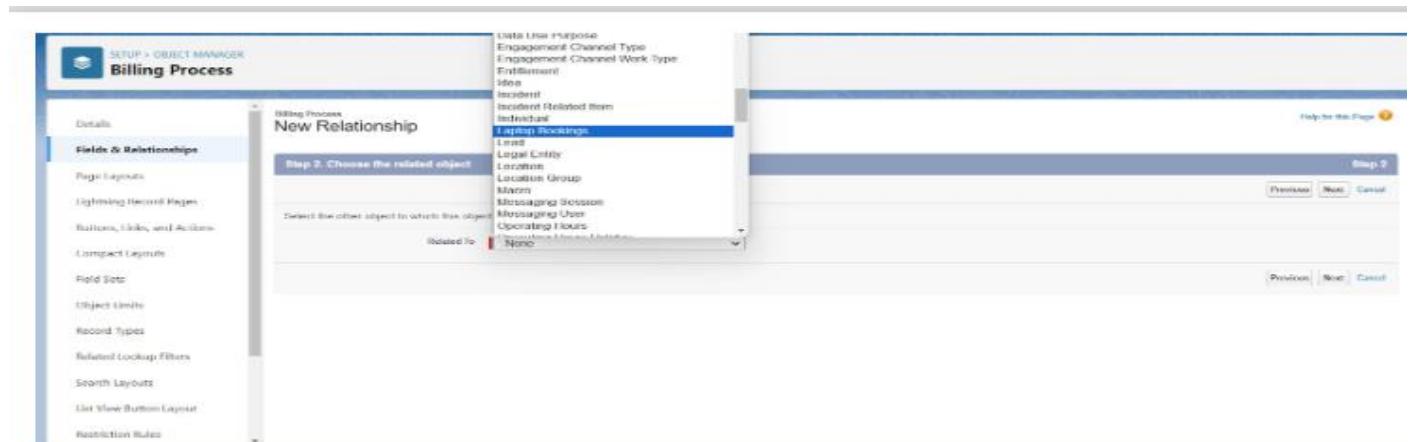
The screenshot shows the Salesforce Setup interface for creating a new relationship. On the left, the sidebar lists options like Details, Fields & Relationships, Page Layouts, etc. The main area is titled "Billing Process New Relationship". Step 2, "Choose the related object", is active. A dropdown menu titled "Related To" is open, showing a list of objects. The "consumer" object is highlighted in blue, indicating it has been selected. Other options in the list include Case, Contact, Communication Subscriptions, and various types of Consent.

1. 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



The screenshot shows the Salesforce Setup interface for creating a new relationship. The sidebar and main area are similar to the previous screenshot, but the "Data Type" is set to "Lookup Relationship". The "Related To" dropdown menu is open, showing a list of objects. The "Laptop Bookings" object is highlighted in blue, indicating it has been selected. Other options in the list include Date Use, Engagement Channel, and various system objects like Limit, Legal Entity, and Message Session.

- Fill the Above as following:
 - Change the Field Label: Laptop Booking
 - Field Name :It's gets auto generated
 - Click on Next - Next - Save and new.

3. Creation of another fields for the billing process object

To create fields in an object:

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

Cross Object Formula Field:

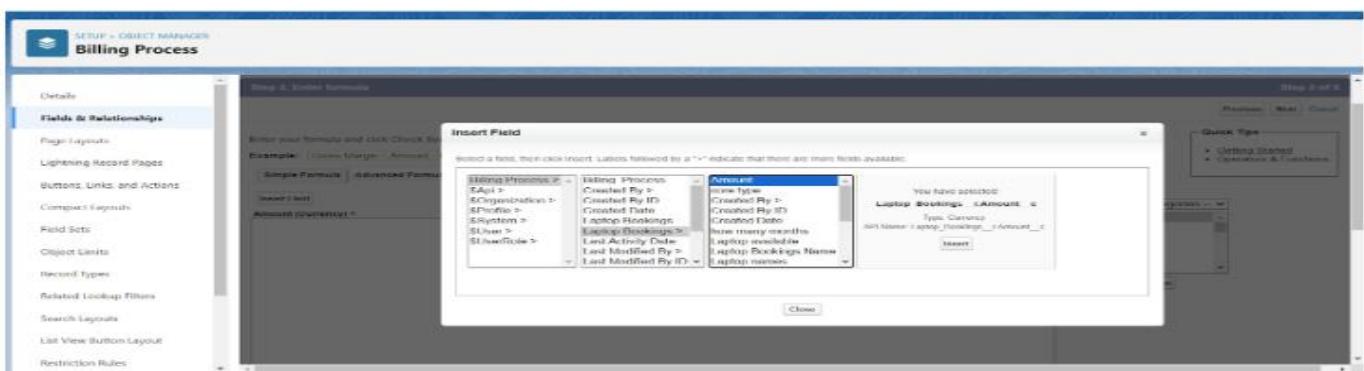
In Salesforce, a cross-object formula field allows you to create a formula that references fields from related objects. It enables you to perform calculations or display data from related records without the need for custom code or complex workflows.

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

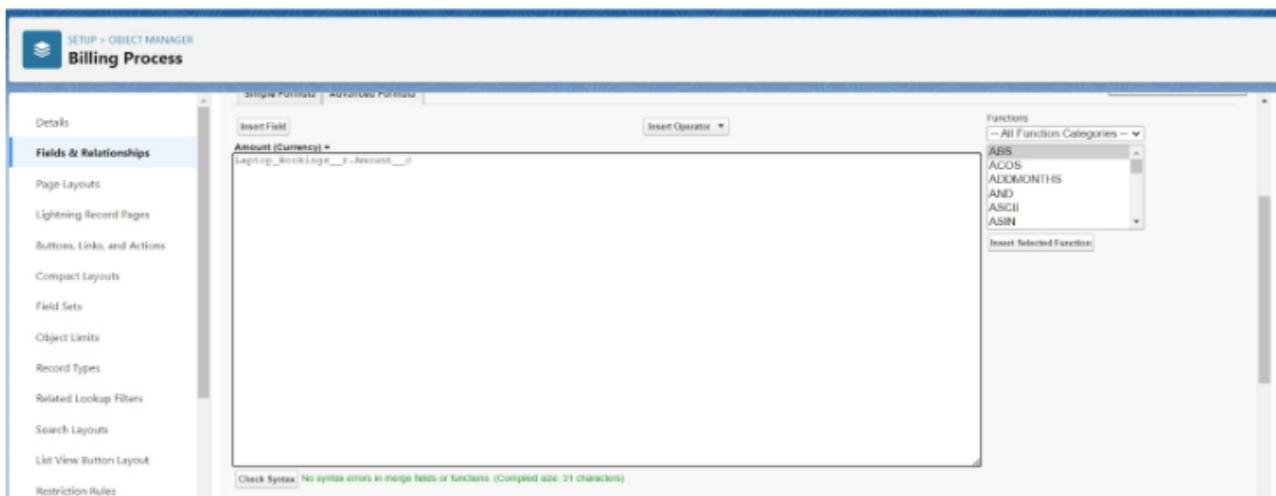
If we want to get the Particular field from another object in that case we will use the Cross object Formula field. For that First we need to create the relationship b/w two objects and relate the field with formula data type.

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

- Go to setup - click on Object Manager - type object name(Billing Process) in the search bar - click on the object.
- Now click on “Fields & Relationships” ? New
- Select Data Type as a “Formula”
- Click on Next
- Enter the Field label: Amount, the Field name gets auto generated and click on Next.(Formula return type Number).
- 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
- “Laptop_Booking__r.Amount__c”.
- Click on the Check syntax: No syntax errors in merge fields



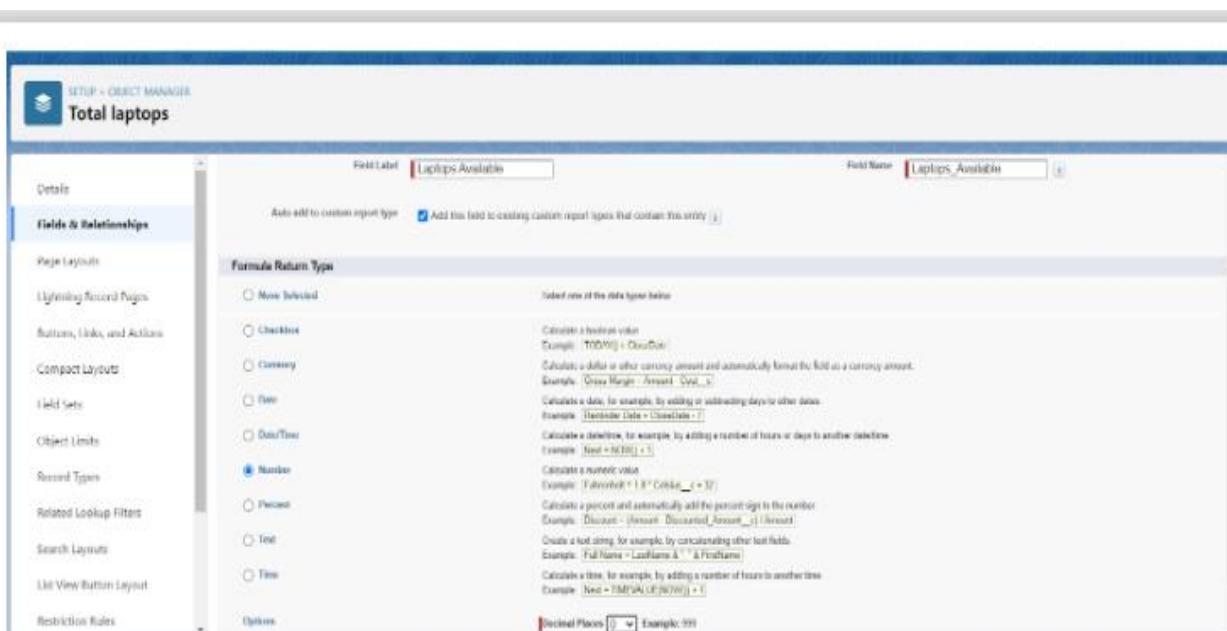
9. Click on Next - Next - Save and new.



Creating The Field In Total Laptops Object

1. To create fields in an object:

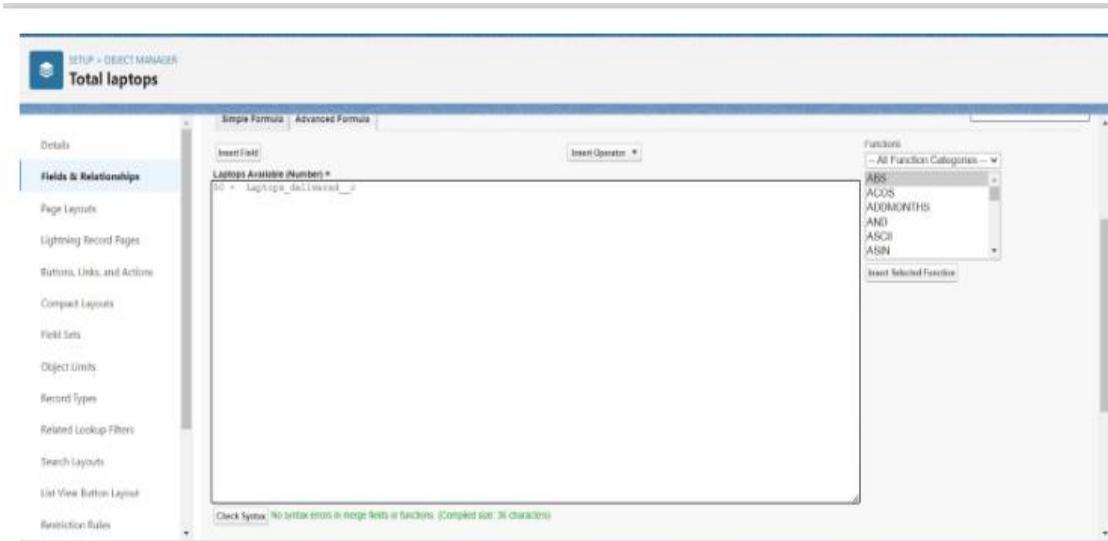
1. Go to setup - click on Object Manager - type object name(Total Laptops) in search bar - click on the object.
2. Now click on “Fields & Relationships” - New
3. Select Data type as a “Formula” and Click on Next
4. Fill the Above as following:
5. Field Label: Laptops Available
6. Field Name : It's gets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



- 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.

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



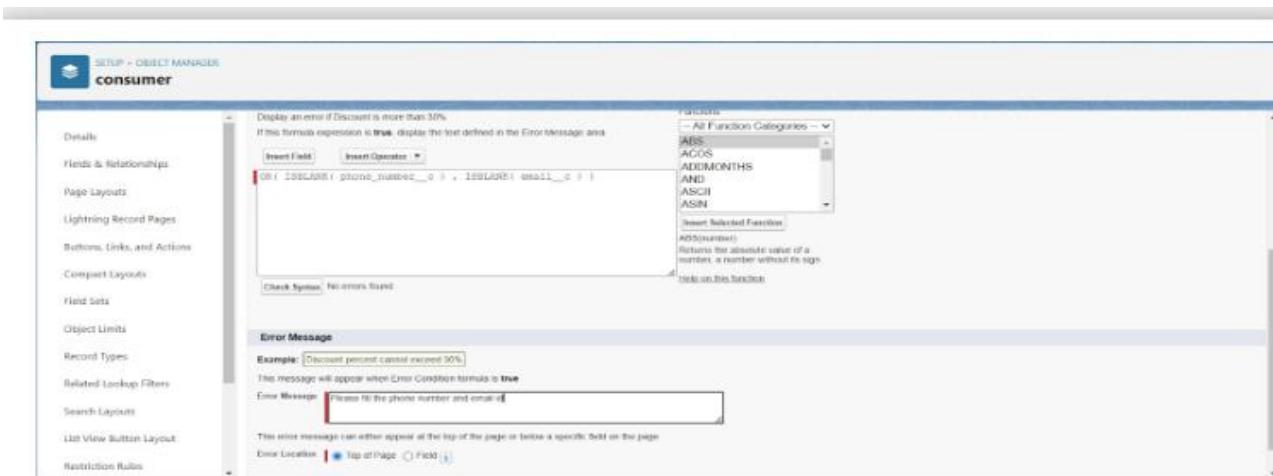
- Click on Next -Next -Save and new.

Validation Rule

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

Creating the validation rule for phone number field in consumer object

- Go to the setup page - click on object manager - From drop down click edit for consumer object.
- 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.



6. Save the validation rule.

Profiles

A profile is a group/collection of settings and permissions that define what a user can do in salesforce.

Types of profiles in salesforce

1. Standard profiles:

By default salesforce provides below standard profiles.

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

Note: We cannot deleted standard one

2. Custom Profiles:

Custom ones defined by us.

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.

The screenshot shows the Salesforce Setup - Profiles page. The 'OWNER' profile is selected. The 'Profile Detail' section shows the profile name is 'owner', created by 'Sanjeetha Suresh' on 05/04/2024, 10:45 pm, and modified by 'Sanjeetha Suresh' on 05/04/2024, 11:36 pm. The 'Custom Profile' checkbox is checked. The 'Page Layouts' section lists various standard object layouts and their corresponding global or specific page layouts. The 'Custom Object Permissions' section is visible at the bottom.

3. 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.

The screenshot shows the 'Custom Object Permissions' section of the profile setup. It includes checkboxes for 'Basic Access' (Read, Create, Edit, Delete, View All, Modify All) and 'Data Administration' (View All, Modify All) for several objects: Utilizing Process, consumers, Laptop Bookings, and Total Laptops. A blue arrow points to the 'Basic Access' checkboxes for the 'Utilizing Process' object.

3. 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.

The screenshot shows the Salesforce Setup Profiles page. At the top, there are sections for Contact Point Credentials, User External Credentials, and a large grid for Custom Object Permissions. The grid includes columns for Billing Process, Consumers, Laptop Bookings, and Total Laptops, with sub-columns for Basic Access (Read, Create, Edit, Delete), Data Administration (View All, Modify All), and specific actions (e.g., View History, Edit History). Below the permissions grid are sections for Session Settings (Session Times Out After, Session Security Level Required at Login) and Password Policies (User passwords expire in, Enforce password history, Minimum password length, Password complexity requirement, Password question requirement, Maximum invalid login attempts, Lockout effective period).

4. Give access and save it.

Roles And Hierarchy

A role in Salesforce defines a user's visibility access at the record level. Roles may be used to specify the types of access that people in your Salesforce organization can have to data. Simply put, it describes what a user could see within the Salesforce organization.

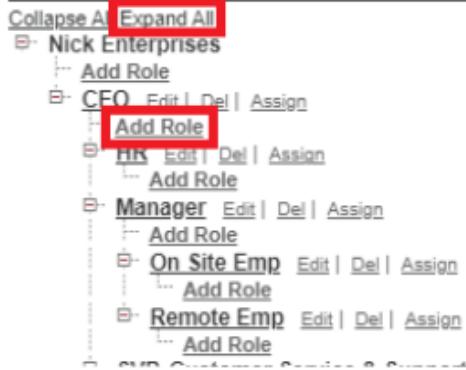
Creating Owner Role

Creating owner Role:

1. Go to quick find - Search for Roles - click on set up roles.

2. Click on Expand All and click on add role under whom this role works.

Your Organization's Role Hierarchy



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

The screenshot shows the 'Role Edit' form for a new role. The 'Label' field contains 'OWNER'. The 'Role Name' field contains 'owner'. The 'This role reports to' dropdown is set to 'CEO'. The 'Role Name as displayed on reports' field is empty. At the bottom are 'Save', 'Save & New', and 'Cancel' buttons.

4. Click and save it.

Activity 2: Creating Agent roles

Creating another two roles under manager

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

```
graph TD; smartbridge --> CEO[CEO]; smartbridge --> COO[COO]; smartbridge --> HR[HR]; smartbridge --> owner[owner]; smartbridge --> SVP_C[VP Customer Service]; smartbridge --> SVP_HR[SVP Human Resources]; smartbridge --> SVP_S[VP Sales & Marketing];
```

The screenshot shows a hierarchical list of roles under 'smartbridge'. The roles are: 'CEO', 'COO', 'HR', 'owner', 'SVP Customer Service & Support', 'SVP Human Resources', and 'SVP Sales & Marketing'. Each role item includes 'Edit | Del | Assign' links and an 'Add Role' link. A 'Show in tree view' button is visible at the top right.

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

Users

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access.

Create User

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.

New User

User Edit Save | Save & New | Cancel

General Information

First Name: vicky
Last Name: yash
Alias: vivash
Email: udeyrush10@gmail.com
Username: udeyrush10@100739@gmail
Nickname: vicky
Title:
Company:
Department:
Division:

Role: owner
User License: Salesforce
Profile: Standard 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: Default Limit (300)
Accessibility Mode (Classic Only):

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.

12. Save it.

Flows:

We need to create a flow:

To get the Amount Field automatic by the selection of laptop types the Amount is generated Automatically in the amount field

Create A Flow On Dell Laptop

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.

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:**

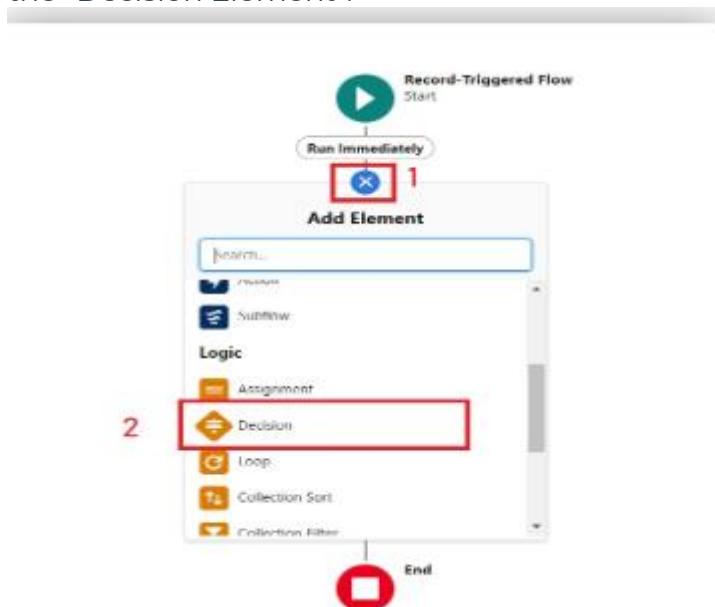
Fast Field Updates
Update fields on the record that triggers the flow to run. This high-performance flow runs before the record is saved to the database.

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.
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.

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	Delete Outcome
acer		
hp		
mac		
false		

Condition Requirements to Execute Outcome: All Conditions Are Met (AND)

Resource	Operator	Value
\$Record > Laptop names X	Equals	Dell

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

9. 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.

Edit Decision

*Label: field updated *API Name: field_updated

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	OUTCOME DETAILS	DELETE OUTCOME
dell core i3	*Label: dell core i3 *Outcome API Name: dellicore_i3	Delete Outcome
dell core i5		
dell core i7		
Default Outcome		

Condition Requirements to Execute Outcome: All Conditions Are Met (AND)

Resource	Operator	Value
\$Record > core type X	Equals	core i3

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

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

18. Enter the Details Label: months selected , API name: Gets Automatically Generated.
19. Enter the Outcome Details Label: dell 1(i3) , Outcome API name: Gets Automatically Generated.
- 20.
- 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.

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>Delete Outcome</th> </tr> </thead> <tbody> <tr> <td>1</td> <td> *Label 1 *Outcome API Name X1 Condition Requirements to Execute Outcome All Conditions Are Met (AND) </td> <td>Delete Outcome</td> </tr> <tr> <td>2</td> <td></td> <td></td> </tr> <tr> <td>3</td> <td></td> <td></td> </tr> <tr> <td>4</td> <td></td> <td></td> </tr> <tr> <td>5</td> <td> Resource \$Record > how many months Operator Equals Value 1 </td> <td>Cancel Done</td> </tr> </tbody> </table>		OUTCOME ORDER	OUTCOME DETAILS	Delete Outcome	1	*Label 1 *Outcome API Name X1 Condition Requirements to Execute Outcome All Conditions Are Met (AND)	Delete Outcome	2			3			4			5	Resource \$Record > how many months Operator Equals Value 1	Cancel Done
OUTCOME ORDER	OUTCOME DETAILS	Delete Outcome																	
1	*Label 1 *Outcome API Name X1 Condition Requirements to Execute Outcome All Conditions Are Met (AND)	Delete Outcome																	
2																			
3																			
4																			
5	Resource \$Record > how many months Operator Equals Value 1	Cancel Done																	

30. Follow the above picture you will understand.
31. After dell 1(i3) there is ‘+’ symbol like dell 2(i3),dell 3(i3),dell 4(i3),dell 5(i3).
32. Click on ‘+’ then select update records
33. Enter the Details Label: one month of dell i3 rate , API name: Gets Automatically Generated.
34. 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
35. 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 months selected	*API Name 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.																			
<table border="1"><thead><tr><th>OUTCOME ORDER</th><th>OUTCOME DETAILS</th><th>DELETE OUTCOME</th></tr></thead><tbody><tr><td>1</td><td>*Label 1 Condition Requirements to Execute Outcome All Conditions Are Met (AND)</td><td>X1</td></tr><tr><td>2</td><td></td><td></td></tr><tr><td>3</td><td></td><td></td></tr><tr><td>4</td><td></td><td></td></tr><tr><td>5</td><td>Resource \$Record > how many months X Operator Equals Value 1</td><td></td></tr></tbody></table>		OUTCOME ORDER	OUTCOME DETAILS	DELETE OUTCOME	1	*Label 1 Condition Requirements to Execute Outcome All Conditions Are Met (AND)	X1	2			3			4			5	Resource \$Record > how many months X Operator Equals Value 1	
OUTCOME ORDER	OUTCOME DETAILS	DELETE OUTCOME																	
1	*Label 1 Condition Requirements to Execute Outcome All Conditions Are Met (AND)	X1																	
2																			
3																			
4																			
5	Resource \$Record > how many months X Operator Equals Value 1																		
Cancel 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.

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	
<ul style="list-style-type: none"> <input checked="" type="checkbox"/> acer core i3 <input type="checkbox"/> acer core i5 <input type="checkbox"/> acer core i7 	Label <input type="text" value="acer core i3"/>	Outcome API Name <input type="text" value="acer_core_i3"/>
	Condition Requirements to Execute Outcome <input type="button" value="All Conditions Are Met (ANR)"/>	
	Resource <input type="text" value="\\$Record > core type"/>	Operator <input type="button" value="Equals"/>
	Value <input type="text" value="core i3"/>	
	<input type="button" value="+ Add Condition"/>	
	When to Execute Outcome <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	
	<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.
 - 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..

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.															
<table border="1"> <thead> <tr> <th>OUTCOME DETAILS</th> <th>Outcome API Name</th> </tr> </thead> <tbody> <tr> <td>acer 1(i3)</td> <td>*Label acer 1(i3)</td> </tr> <tr> <td>acer 2(i3)</td> <td>*Outcome API Name acer_2(i3)</td> </tr> <tr> <td>acer 3(i3)</td> <td>Condition Requirements to Execute Outcome All Conditions Are Met (AND)</td> </tr> <tr> <td>acer 4(i3)</td> <td>Resource \$Record > how many months</td> </tr> <tr> <td>acer 5(i3)</td> <td>Operator Equals</td> </tr> <tr> <td></td> <td>Value 1</td> </tr> </tbody> </table>		OUTCOME DETAILS	Outcome API Name	acer 1(i3)	*Label acer 1(i3)	acer 2(i3)	*Outcome API Name acer_2(i3)	acer 3(i3)	Condition Requirements to Execute Outcome All Conditions Are Met (AND)	acer 4(i3)	Resource \$Record > how many months	acer 5(i3)	Operator Equals		Value 1
OUTCOME DETAILS	Outcome API Name														
acer 1(i3)	*Label acer 1(i3)														
acer 2(i3)	*Outcome API Name acer_2(i3)														
acer 3(i3)	Condition Requirements to Execute Outcome All Conditions Are Met (AND)														
acer 4(i3)	Resource \$Record > how many months														
acer 5(i3)	Operator Equals														
	Value 1														
<input type="button" value="Delete Outcome"/> <input type="button" value="Cancel"/> <input type="button" value="Done"/>															

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

Set Field Values for the Laptop Bookings Record

Field Amount_c	Value 900	
<input type="button" value="Add Field"/>		<input type="button" value="Cancel"/> <input type="button" value="Done"/>

19. 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.

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	When to Execute Outcome
hp core i3	<input type="text" value="hp core i3"/> <input type="text" value="hp.core.i3"/>	All Conditions Are Met (AND)	<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
hp core i5			
hp core i7			
Default Outcome			

Condition Requirements to Execute Outcome:

Condition: \$Record > core type X Operator: Equals Value: core i3

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

Buttons: Delete Outcome, 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
Amount__c	1700

[+ Add Field](#)

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

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.

Edit Decision

*Label mac field should be updated	*API Name mac_field_should_be_updated	
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 	OUTCOME DETAILS	
mac laptop	*Label mac laptop	
Default Outcome	*Outcome API Name mac_laptop	
Condition Requirements to Execute Outcome		
All Conditions Are Met (AND)		
Resource 	Operator Equals	Value Bionic chip
<a data-bbox="484 2077 580 2100" href="#">+ Add Condition		

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

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	Delete Outcome
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)	[]
mac bionic chip(2)			[]
mac bionic chip(3)			[]
mac bionic chip(4)			[]
mac bionic chip(5)			[]
Default Outcome:			
+ Add Condition			
When to Execute Outcome []			
<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 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 ▾

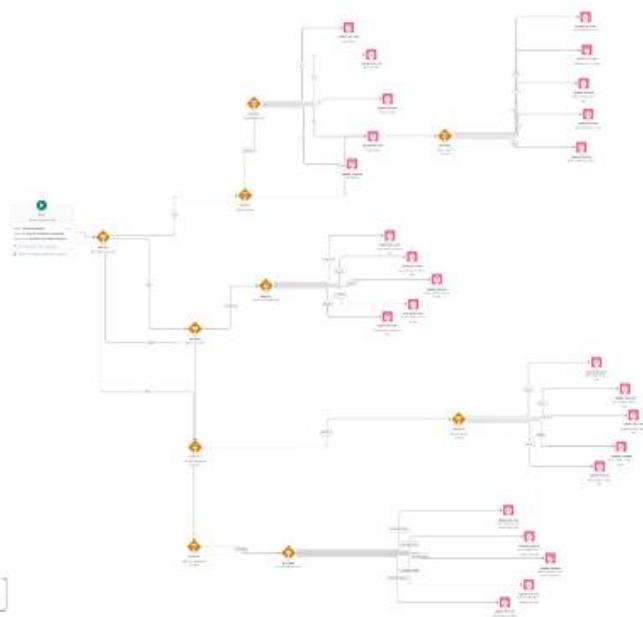
Set Field Values for the Laptop Bookings Record

Field	Value
Amount_c	2000

Cancel Done

Click done

FLOW:



Click on save .

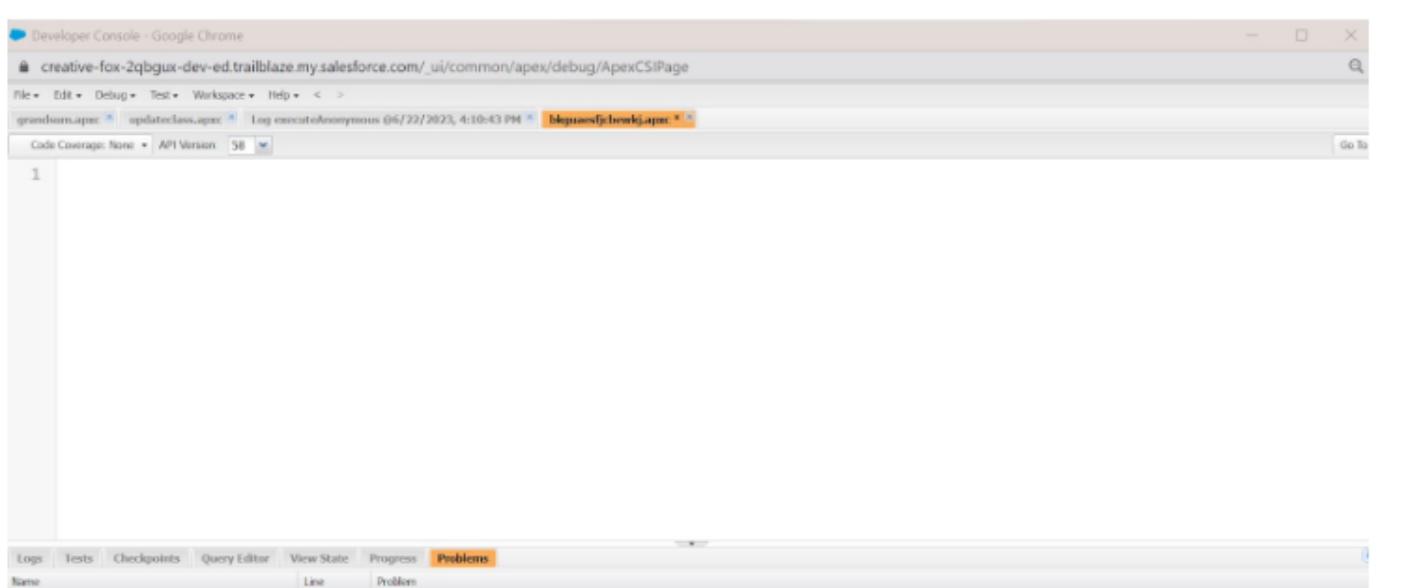
Label:- Laptop distributions, api name:- automatically filled

Save the flow and activate it.

APEX

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

Access specifiers in Apex :

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

```
1 public class student {  
2  
3 }
```

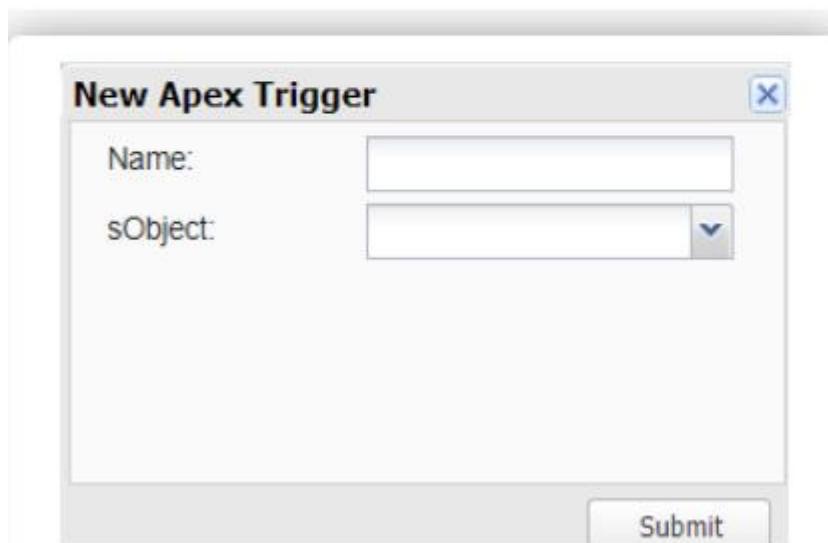
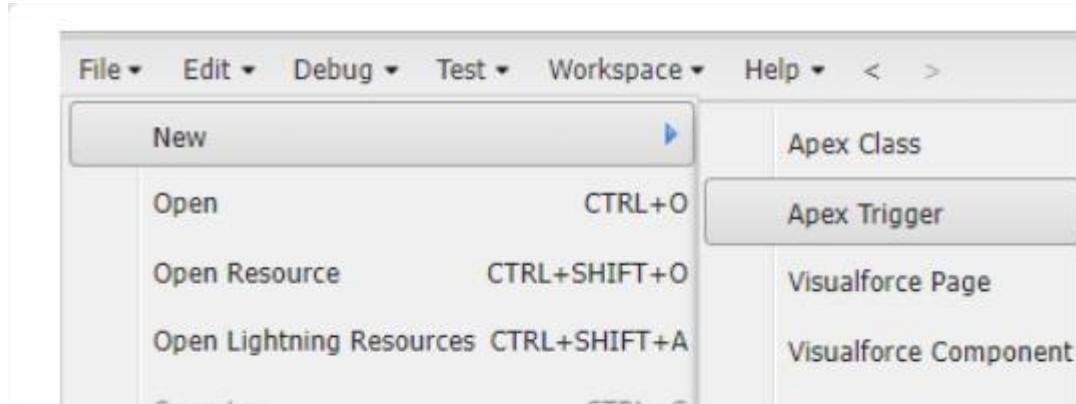
Triggers :

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.

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.

- Click on the File menu in the toolbar, and click on new- Trigger.
- Enter the trigger name and the object to be triggered.



Syntax For creating trigger :

The syntax for creating trigger is :

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

The screenshot shows the Developer Console in Google Chrome. The address bar indicates the URL is google-7da-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage. The page title is 'Developer Console - Google Chrome'. The code editor displays the following Apex trigger code:

```
1 trigger LaptopBooking on Laptop_Bookings__c (After insert,after update) {
2
3     if(trigger.isAfter && ( trigger.isInsert || trigger.isupdate))
4     {
5         LaptopBookingHandler.sendEmailNotification(trigger.new);
6     }
7
8
9 }
```

Trigger code:

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

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

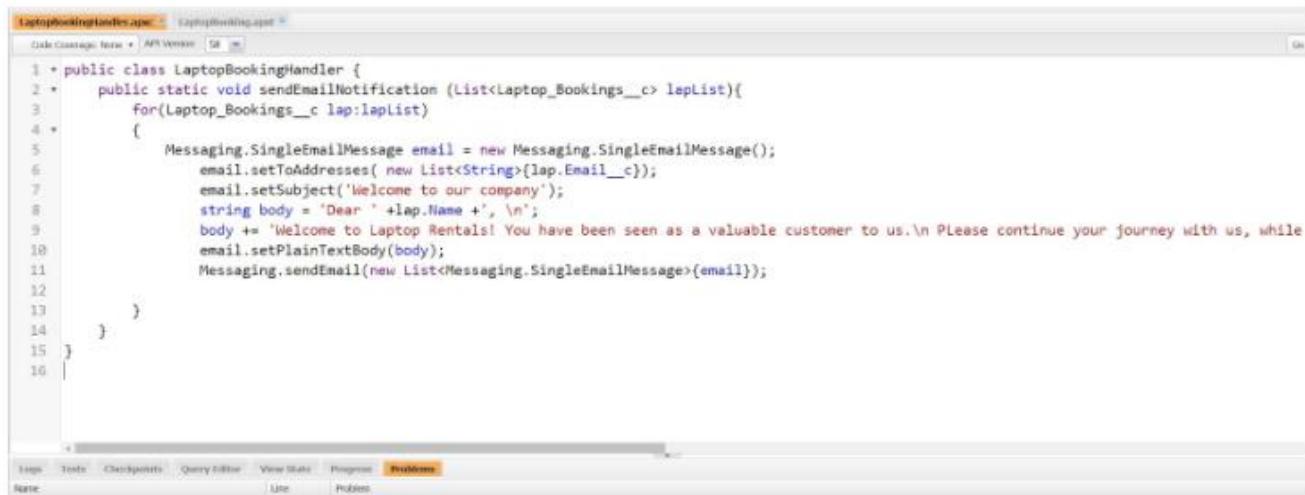
```
}
```

Note:- copy the API names

1.LaptopBooking - trigger name

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

Handler Class:



The screenshot shows the Salesforce IDE interface with the code editor open. The class is named 'LaptopBookingHandler'. The code implements a static method 'sendEmailNotification' that takes a list of 'Laptop_Bookings__c' objects. It iterates through the list, creating a single email message for each entry. The email is set to the customer's email address, has a subject of 'Welcome to our company', and a body containing a welcome message and a note about continuing their journey with the company. Finally, it sends the 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 with us, while
10 *             email.setPlainTextBody(body);
11 *             Messaging.sendEmail(new List<Messaging.SingleEmailMessage>{email});
12 *
13 *         }
14 *     }
15 * }
```

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.

Types of Reports in Salesforce

1. Tabular
2. Summary
3. Matrix
4. Joined Reports

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.

Create Report

Category	Report Type Name	Category
Recently Used	Activities with consumers	Standard
All	Total Laptops with Laptop Bookings and consumers	Standard
Accounts & Contacts	consumers	Standard
Opportunities	consumers with Laptop Bookings and Total Laptops	Standard
Customer Support Reports	consumers with Billing Process	Standard
Leads	consumers with Billing Process and Laptop Bookings	Standard
Campaigns	consumer History	Standard
Activities		
Contracts and Orders		
Price Books, Products and Assets		

4. Customize your report

5. Add fields from left pane as shown below

The screenshot shows the Report Builder interface with the following details:

- Report Title:** consumer with laptops and total laptops
- Report Subtitle:** consumers with Laptop Bookings and Total Laptops
- Fields Panel (Left):**
 - Groups:** GROUP ROWS, Add group...
 - Columns:** consumer: consumer_name, Laptop Bookings: Laptop Bookings, Total No Of Laptops: Total Laptops, Laptop Name, Core Type, # Amount
- Report Preview (Main Area):**

	consumer: consumer_name	Laptop Bookings: Laptop Bookings	Total No Of Laptops: Total Laptops	Laptop Name	Core Type	# Amount
Intermediate (3)	Sunny	stackneus	4	Acer	Core i5	₹1,000
	uday	SmartInternz	11	Dell	core i3	₹2,000
	uday	SmartInternz	9	Dell	Core i5	₹3,000
Subtotal						₹6,000
High (5)	uday	SmartInternz	10	Acer	Core i7	₹6,500
	uday	codehub	11	Mac	Core i5	₹6,500
	Arun	Google	2	Dell	core i3	₹8,000
	Rakesh	SmartInternz	1	Mac	core i3	₹8,000
	varun	Pandora	8	Hp	core i3	₹8,000
Subtotal						₹37,000
very high (4)	Arun	stackneus	3	Acer	Core i7	₹9,000
	varun	Pandora	7	Hp	Core i7	₹9,500
	varun	Pandora	6	Hp	Core i7	₹9,500
	varun	Pandora	5	Hp	Core i7	₹11,000
Subtotal						₹39,000
Total (12)						₹82,000
- Report Controls (Top Right):** Search bar, Report Builder dropdown, Run button.

Follow the above image group rows and columns.

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

Edit Bucket Column

* Field	* Bucket Name
Amount	types of versions
Range	Bucket
<= 900	Basic
> 900 to 3500	Intermediate
> 3,500 to 8000	High
> 8,000	very high

Treat empty Amount values in the report as zeros.

Click apply it.

Follow the picture and save or run it.

The screenshot shows a report titled "Report: consumers with Laptop Bookings and Total Laptops consumer with laptops and total laptops". The report includes a header with "Total Records" (12) and "Total Amount" (₹82,000). The main table displays data grouped by consumer type (Intermediate, High, very high) and consumer name. The columns include consumer_name, stackneus, Sunny, uday, Arun, Rakesh, varun, Smartinternz, codehub, Google, Pandora, Laptop Bookings, Total No Of Laptops, Total Laptops, Laptop Name, Core Type, and Amount. The data shows various laptop models like Acer, Dell, Mac, and Hp with their respective core types and prices.

types of versions	consumer: consumer_name	Laptop Bookings: Laptop Bookings	Total No Of Laptops: Total Laptops	Laptop Name	Core Type	Amount
Intermediate (3)	Sunny	stackneus	4	Acer	Core i5	₹1,000
	uday	Smartinternz	11	Dell	core i3	₹2,000
	uday	Smartinternz	9	Dell	Core i5	₹3,000
Subtotal						₹6,000
High (5)	uday	Smartinternz	10	Acer	Core i7	₹6,500
	uday	codehub	11	Mac	Core i5	₹6,500
	Arun	Google	2	Dell	core i3	₹8,000
	Rakesh	Smartinternz	1	Mac	core i3	₹8,000
	varun	Pandora	8	Hp	core i3	₹8,000
Subtotal						₹37,000
very high (4)	Arun	stackneus	3	Acer	Core i7	₹9,000
	varun	Pandora	7	Hp	Core i7	₹9,500
	varun	Pandora	6	Hp	Core i7	₹9,500
	varun	Pandora	5	Hp	Core i7	₹11,000
Subtotal						₹39,000
Total (12)						₹82,000

Sharing Report To Owner

1. Click edit drop down and select subscribe option
2. Follow as per below image

The dialog box is titled "Edit Subscription". It has a "Settings" section with "Frequency" options: Daily (selected), Weekly, and Monthly. Under "Time", the time is set to 8:00 am. In the "Attachment" section, there is a "Attach File" button. The "Recipients" section shows "Send email to Me" and a "Edit Recipients" button. The "Run Report As" section has radio buttons for "Me" (unchecked) and "Another Person" (checked). At the bottom are "Cancel" and "Save" buttons.

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

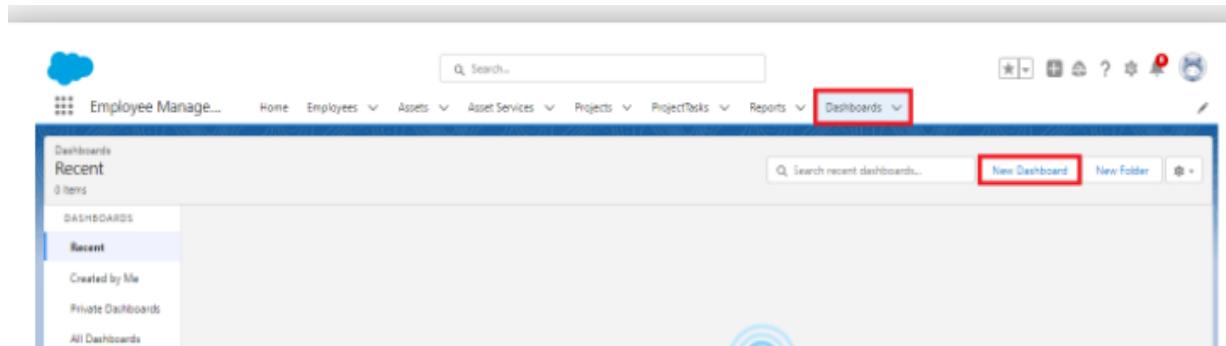
Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports.

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

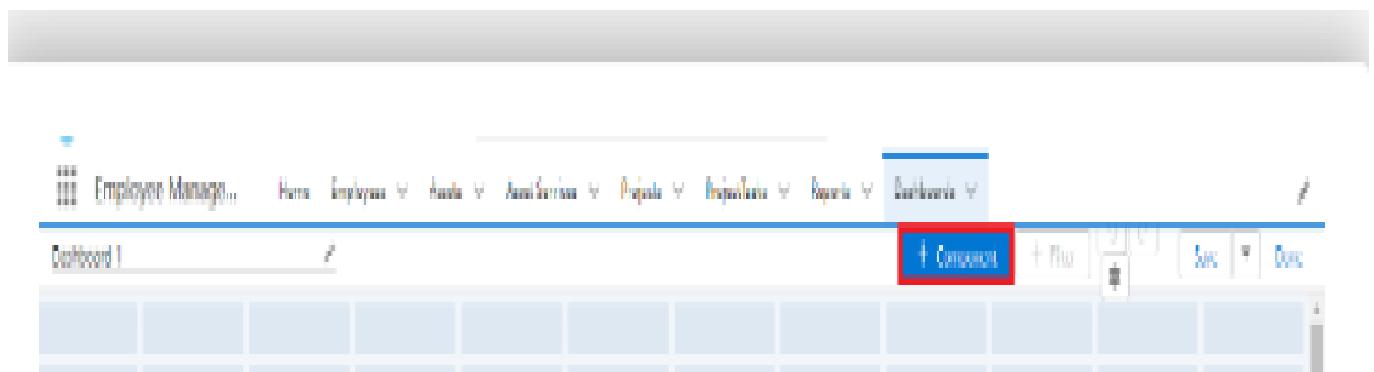
1. Go to the app - click on the Dashboards tabs.



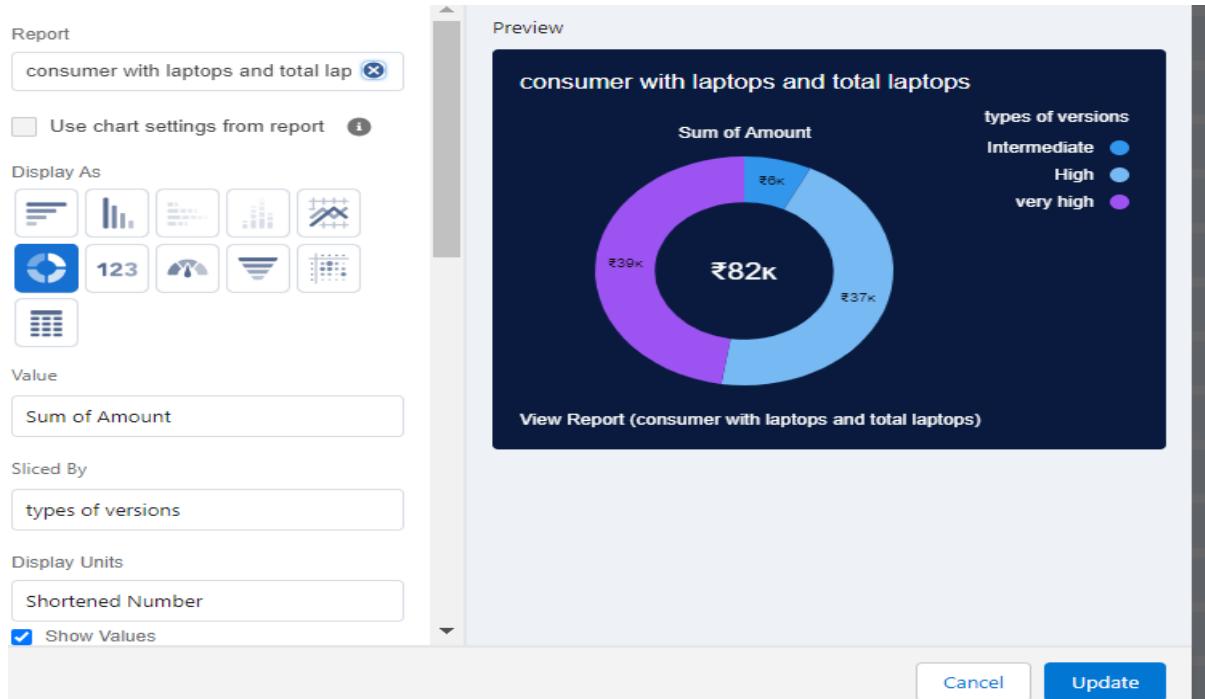
2. Give a Name and select the folder that was created, and click on create

A screenshot of the 'New Dashboard' dialog box. It has fields for 'Name' (containing 'data analytics of laptops'), 'Description' (containing 'total amount of data in dashboards'), and 'Folder' (containing 'total rents amount'). There's a 'Select Folder' button next to the folder input field. At the bottom are 'Cancel' and 'Create' buttons, with 'Create' being highlighted in a blue box.

3. Select add component.



4. Select a Report and click on select.



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

...THE END...

1.

