

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.

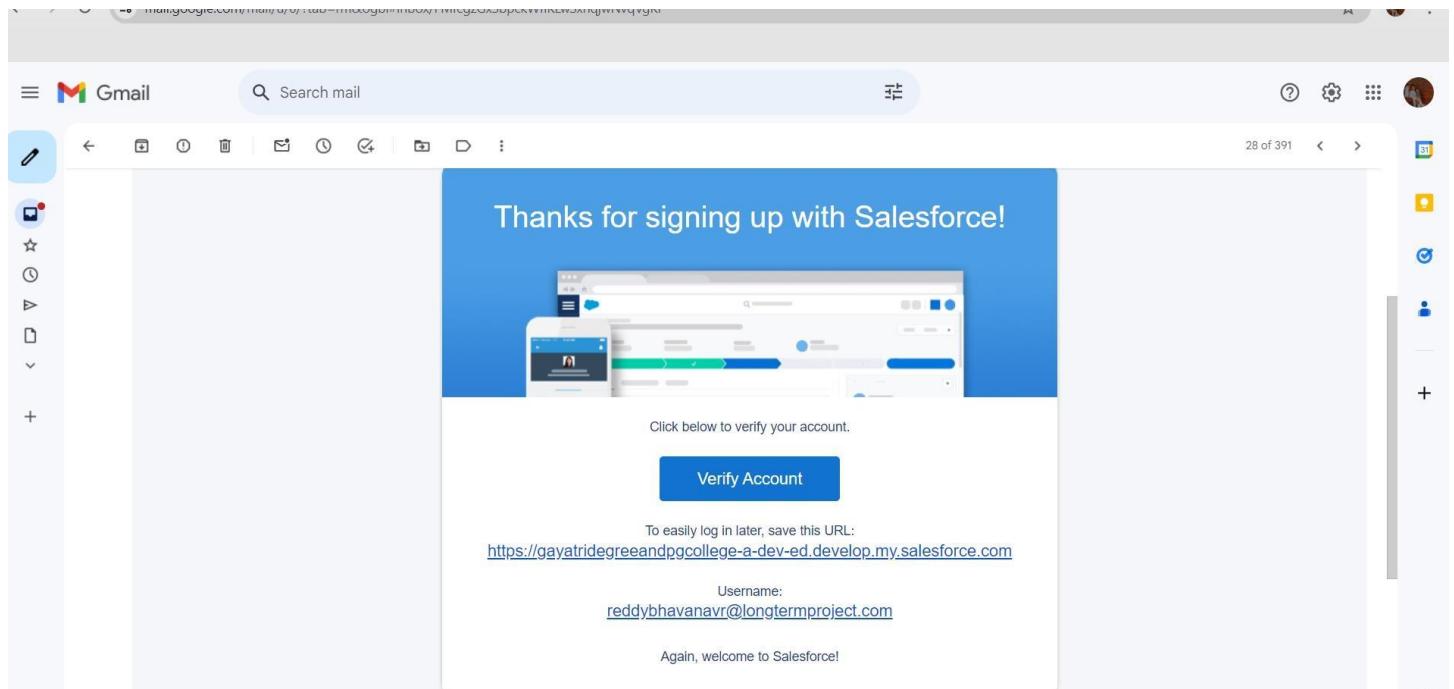
On the sign-up form, enter the following details:

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

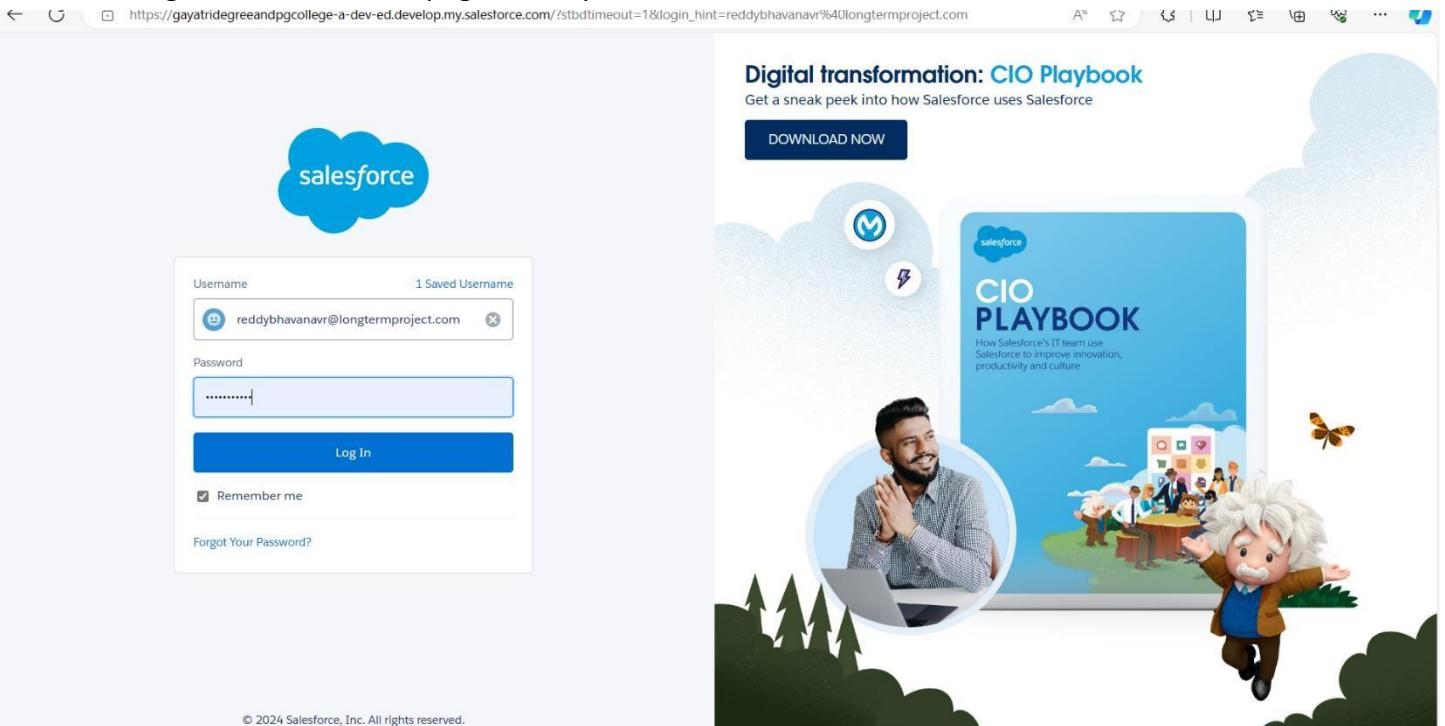
Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account.

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.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes the Salesforce logo, a search bar labeled 'Search Setup', and various global buttons. Below the navigation is a secondary header with 'SETUP > OBJECT MANAGER' and the object name 'Total Laptops'. On the left, a sidebar lists various configuration tabs: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main content area is titled 'Details' and contains two sections. The first section, 'Description', includes fields for API Name ('Total_Laptops__c'), Custom status ('Custom'), Singular Label ('Total Laptops'), and Plural Label ('Total Laptops'). The second section, 'Enable Reports', includes checked checkboxes for 'Track Activities' and 'Track Field History'. Other settings listed include Deployment Status ('Deployed'), Help Settings, and Standard salesforce.com Help Window. At the bottom right of the main content area are 'Edit' and 'Delete' buttons. The URL in the browser's address bar is partially visible as <https://navatriderdev.cs14.salesforce.com/lightning/canvas/ObjectManager/011T00002KGPT/details/view>.

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. Label: **consumer**
5. Plural Label: **consumer**
6. Record Name -**consumer_name**
7. Data Type – **Name**
8. Click on Allow reports, Allow search and Track Field History
9. Click Save.

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

- Header:** Includes the Salesforce logo, a search bar labeled "Search Setup", and various navigation icons.
- Breadcrumbs:** "SETUP > OBJECT MANAGER" followed by "consumer".
- Left Sidebar (Details):** A list of customization options:
 - Fields & Relationships
 - Page Layouts
 - Lightning Record Pages
 - Buttons, Links, and Actions
 - Compact Layouts
 - Field Sets
 - Object Limits
 - Record Types
 - Related Lookup Filters
 - Search Layouts
 - List View Button Layout
 - Restriction Rules
 - Scoping Rules
- Right Panel (Details):** The main configuration area for the "consumer" object.
 - Description:** A text input field.
 - API Name:** consumer_c
 - Custom:** A dropdown menu showing "Custom" selected.
 - Singular Label:** consumer
 - Plural Label:** consumer
 - Enable Reports:** A checkbox that is checked.
 - Track Activities:** A checkbox that is unchecked.
 - Track Field History:** A checkbox that is checked.
 - Deployment Status:** Deployed
 - Help Settings:** Standard salesforce.com Help Window
- Buttons:** "Edit" and "Delete" buttons in the top right corner.

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.

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

- Setup** tab selected.
- Object Manager** tab selected.
- Laptop Bookings** object is being edited.
- Details** tab selected.
- Description**: Laptop Bookings
- API Name**: Laptop_Bookings__c
- Custom**: ✓
- Singular Label**: Laptop Bookings
- Plural Label**: Laptop Bookings
- Enable Reports**: ✓
- Track Activities**: ✓
- Track Field History**: ✓
- Deployment Status**: Deployed
- Help Settings**: Standard salesforce.com Help Window

Left sidebar navigation:

- 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

Page URL: https://gayatrriegreeandpgcollege-a-dev-ed.develop.lightning.force.com/one/one.app#/setup/ObjectManager/011T000002KGf9/FieldsAndRelationships/view

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.



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	
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

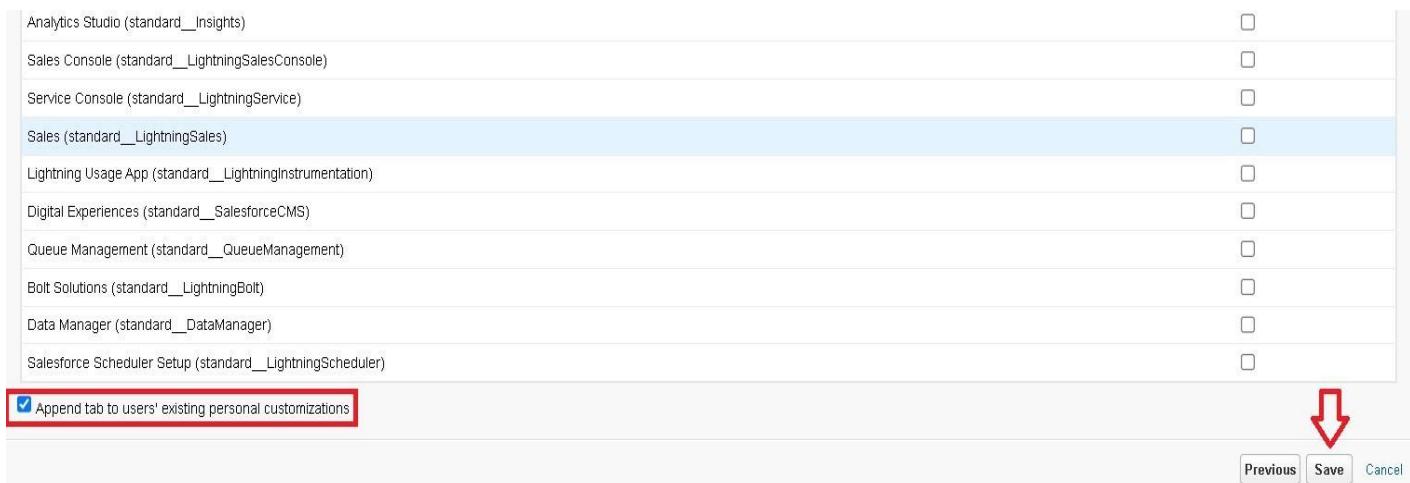
Edit **Delete**

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

Action	Label	Tab Style	Description
Edit Del	Billing Process	Cell phone	
Edit Del	consumer	Camera	
Edit Del	Laptop Bookings	Hexagon	
Edit Del	Total Laptops	Bank	

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.

App Settings

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

App Settings

- App Details & Branding
- App Options
- Utility Items (Desktop Only)
- Navigation Items**
- User Profiles

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.

Available Items

Type to filter list...

- Accounts
- All Sites
- Alternative Payment Methods
- Analytics
- App Launcher
- Appointment Categories
- Appointment Invitations
- Approval Requests
- Asset Action Sources
- Asset Actions
- Asset State Periods

Selected Items

- Total Laptops
- consumer
- Laptop Bookings
- Billing Process

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.

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

Scoping Rules

Fields & Relationships

11 Items, Sorted by Field Label

Amount	Amount_c	Currency(18, 0)
consumer Status	consumer_Status_c	Picklist
consumer_name	Name	Text(80)
Created By	CreatedBy	Lookup(User)
Email	Email_c	Email
Last Modified By	LastModifiedBy	Lookup(User)
Name	Name_c	Lookup(Laptop Bookings)
Owner	OwnerId	Lookup(User,Group)
Phone number	Phone_number_c	Phone
Total No Of Laptops	Total_No_of_Laptops_c	Lookup(Total Laptops)

Quick Find | New | Deleted Fields | Field Dependencies | Set History Tracking

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.

Field Label	API Name	Type
Amount	Amount__c	Currency(18, 0)
consumer_Status	consumer_Status__c	Picklist
consumer_name	Name	Text(80)
Created_By	CreatedBy	Lookup(User)
Email	Email__c	Email
Last_Modified_By	LastModifiedBy	Lookup(User)
Name	Name__c	Lookup(Laptop Bookings)
Owner	OwnerId	Lookup(User,Group)
Phone_number	Phone_number__c	Phone
Total_No_Of_Laptops	Total_No_of_Laptops__c	Lookup(Total Laptops)

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.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address_c	Text Area(255)		
Amount	Amount_c	Currency(18, 0)		
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)		
Name	Name_c	Lookup(Laptop Bookings)		
Owner	OwnerId	Lookup(User,Group)		
Phone number	Phone_number_c	Phone		

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
9. Select Required
10. Click Next, Next, then Save.

SETUP > OBJECT MANAGER
consumer

Fields & Relationships		Fields & Relationships				
11 Items, Sorted by Field Label		FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address_c	Text Area(255)				
Amount	Amount_c	Currency(18, 0)				
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)				
Name	Name_c	Lookup(Laptop Bookings)			✓	
Owner	OwnerId	Lookup(User,Group)			✓	
Phone number	Phone_number_c	Phone				

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 Label: 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.

Fields & Relationships				
8 Items, Sorted by Field Label				
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount_c	Currency(18, 0)		
core type	core_c	Picklist	Laptop names	
Created By	CreatedBy	Lookup(User)		
Laptop Bookings Name	Name	Text(80)		✓
Laptop names	Laptop_type_c	Picklist		
Last Modified By	LastModifiedBy	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
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:

Fields & Relationships
6 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Laptops Available	Laptops_Available__c	Formula (Number)		
Laptops delivered	Laptops_delivered__c	Roll-Up Summary (COUNT Laptop Bookings)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Total Laptops	Name	Text(80)		✓

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.

Laptop available (Number) =
80 - Total_no_of_laptops__r.Laptops_delivered__c

Check Syntax: No syntax errors in merge fields or functions. (Compiled size: 36 characters)

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.

Fields & Relationships				
11 Items, Sorted by Field Label				
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Currency(18, 0)		
core type	core__c	Picklist	Laptop Names	
Created By	CreatedBy	Lookup(User)		
Email	Email__c	Email		
how_many_months	how_many_months__c	Picklist		
Laptop Bookings	Name	Text(80)		✓
Laptop Names	Laptop_type__c	Picklist		
Laptops Available	Laptops_Available__c	Formula (Number)		
Last Modified By	LastModifiedBy	Lookup(User)		

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.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'Billing Process'. On the left, a sidebar lists various setup options like 'Details', 'Fields & Relationships' (which is selected), 'Page Layouts', etc. The main content area is titled 'Fields & Relationships' and shows a table of fields for the Billing Process object. The table has columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are:

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		

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

Step 3. Enter formula

Insert Field

Select a field, then click Insert. Labels followed by a ">" indicate that there are more fields available.

Simple Formula Advanced Formula

Amount (Currency) =

Billing Process >

- \$Api >
- \$Organization >
- \$Profile >
- \$System >
- \$User >
- \$UserRole >

Billing_Process

- Created By >
- Created By ID
- Created Date
- Laptop Bookings >
- Last Activity Date
- Last Modified By >
- Last Modified By ID

Amount

- core type
- Created By >
- Created By ID
- Created Date
- how many months
- Laptop available
- Laptop Bookings Name
- Laptop names

You have selected:
Laptop_Bookings__r.Amount__c
Type Currency
API Name: Laptop_Bookings__r.Amount__c

Insert

Close

Quick Tips

- Getting Started
- Operators & Functions

Simple Formula Advanced Formula

Insert Field

Amount (Currency) = Laptop_Bookings__r.Amount__c

Insert Operator

Functions

-- All Function Categories --

ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN

Insert Selected Function

Check Syntax No syntax errors in merge fields or functions. (Compiled size: 31 characters)

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”

SETUP > OBJECT MANAGER
Total laptops

Details	Field Label <input type="text" value="Laptops Available"/>	Field Name <input type="text" value="Laptops_Available"/> i
Fields & Relationships	Auto add to custom report type <input checked="" type="checkbox"/> Add this field to existing custom report types that contain this entity i	
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		
	Formula Return Type <input type="radio"/> None Selected Select one of the data types below. <input type="radio"/> Checkbox Calculate a boolean value. Example: <code> TODAY > CloseDate</code> <input type="radio"/> Currency Calculate a dollar or other currency amount and automatically format the field as a currency amount. Example: <code>(Gross Margin - Amount - Cost) / Cost</code> <input type="radio"/> Date Calculate a date, for example, by adding or subtracting days to other dates. Example: <code>Reminder Date = CloseDate - 7</code> <input type="radio"/> Date/Time Calculate a dateline, for example, by adding a number of hours or days to another date/time. Example: <code>Next = NOW() + 1</code> <input checked="" type="radio"/> Number Calculate a numeric value. Example: <code>Fahrenheit = 1.8 * Celsius + 32</code> <input type="radio"/> Percent Calculate a percent and automatically add the percent sign to the number. Example: <code>Discount = (Amount - Discounted_Amount) / Amount</code> <input type="radio"/> Text Create a text string, for example, by concatenating other text fields. Example: <code>Full Name = LastName & ", " & FirstName</code> <input type="radio"/> Time Calculate a time, for example, by adding a number of hours to another time. Example: <code>Next = TIMEVALUE(NOW()) + 1</code>	
	Options	<input type="button" value="Decimal Places"/> <input type="text" value="0"/> <input type="button" value="Example: 999"/>

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

SETUP > OBJECT MANAGER
Total laptops

Details	Simple Formula i Advanced Formula i	Insert Field i Insert Operator i	Functions i – All Function Categories – i
Fields & Relationships	<pre>Laptops Available (Number) = 50 - Laptops_delivered__c</pre>		
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			
	Check Syntax No syntax errors in merge fields or functions. (Compiled size: 36 characters)		

Click on Next -Next -Save and new.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Laptops Available	Laptops_Available__c	Formula (Number)		
Laptops delivered	Laptops_delivered__c	Roll-Up Summary (COUNT Laptop Bookings)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Total Laptops	Name	Text(80)		✓

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

Rule Name	Phonenumberoremailblankrule	Active	✓
Error Condition Formula	OR(ISBLANK(Phone_number__c), ISBLANK(Email__c))	Error Location	Top of Page
Error Message	please fill the phone number and email id		
Description	phone number and email number should not be blank		
Created By	REDDY BHAVANA V.R. 06/04/2024, 2:07 pm	Modified By	REDDY BHAVANA V.R. 06/04/2024, 2:07 pm

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.

The screenshot shows the Salesforce Setup interface under the 'Profiles' section. At the top, there's a header with a user icon, 'SETUP', and 'Profiles'. Below the header, a message states: 'Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.' A note below it says: 'If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.' A horizontal bar lists various system-wide permissions. The main area is titled 'Profile Detail' and contains fields for Name (owner), User License (Salesforce), Description, Created By (udayrushi.yelagandula), Modified By (udayrushi.yelagandula), and a 'Custom Profile' checkbox which is checked. Below this is a 'Page Layouts' section titled 'Standard Object Layouts' with a table mapping global layouts to object milestones. The table includes rows for Global, Email Application, Home Page Layout, Account, Alternative Payment Method, and Appointment Invitation, each mapped to specific layouts like 'Global Layout' or 'Appointment Invitation Layout'.

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

The screenshot shows the Salesforce Setup Profiles page. At the top, there are sections for Individuals, Invoices, Leads, Work Types, and Work Type Groups, each with checkboxes for various permissions. Below this is a section titled "Custom Object Permissions" which includes a table for "Billing Process" and "consumers". A blue arrow points to the "Data Administration" row in the Billing Process table. The table has columns for Basic Access (Read, Create, Edit, Delete) and Data Administration (View All, Modify All). The "consumers" table also has these columns. Further down are sections for Session Settings and Password Policies.

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

Billing Process objects as mentioned in the below diagram.

This screenshot shows the same Salesforce Setup Profiles page as the previous one, but with a different set of objects selected in the "Custom Object Permissions" table. The "Billing Process" and "consumers" objects now have checkboxes in the "Data Administration" row. The "Password Policies" section at the bottom is more detailed, showing settings for password expiration, history, length, complexity, questions, invalid attempts, and lockout period.

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

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.

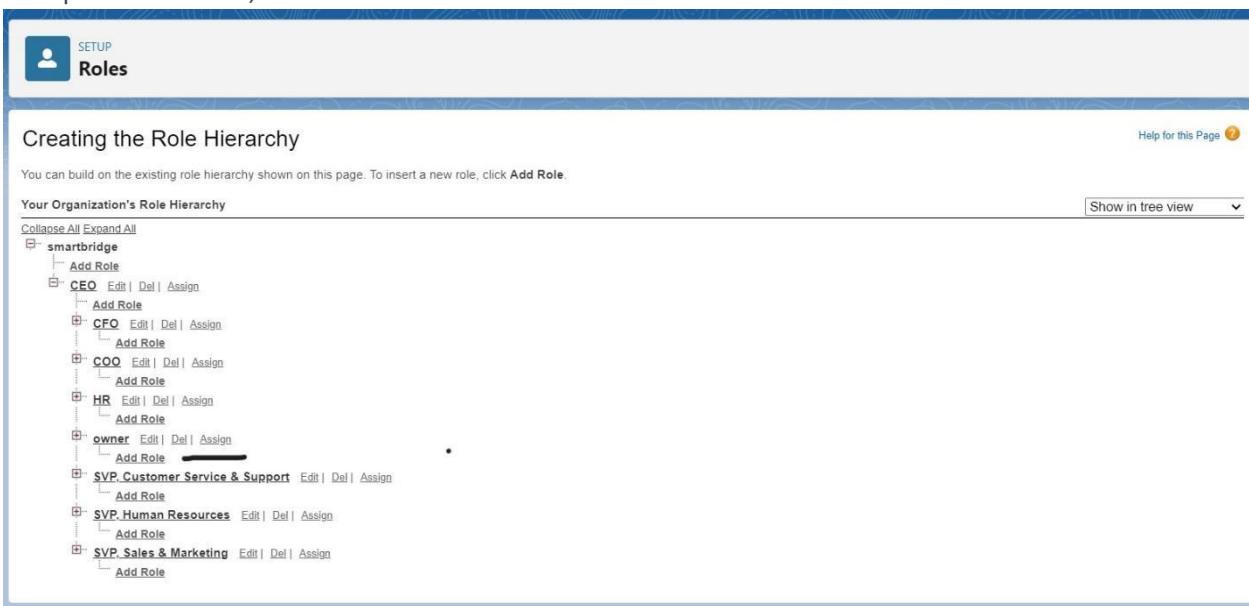
The screenshot shows the 'Role Edit' page for creating a new role. The 'Label' field contains 'owner'. The 'Role Name' field also contains 'owner'. The 'This role reports to' dropdown is set to 'CEO'. The 'Role Name as displayed on reports' field is empty. At the bottom, there are 'Save', 'Save & New',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

- 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.

The screenshot shows the Salesforce Setup interface. On the left, there's a sidebar with various categories like Permission Set Groups, Profiles, Public Groups, Queues, Roles, User Management Settings, and so on. Under 'User Management Settings', the 'Users' section is selected. In the main area, a search bar at the top says 'Search Setup'. Below it, a 'SETUP' button and a 'Users' icon are visible. The main content area is titled 'User Detail' for a user named 'Vicky y'. The 'Edit' button is highlighted. The user details include Name: 'vicky y', Alias: 'vy', Email: 'reddybhavanavr@gmail.com', Username: 'reddybhavanavr1104@gmail.com', Nickname: 'vicky', Title: ' ', Company: ' ', Department: ' ', Division: ' ', Address: 'India', Time Zone: '(GMT+05:30) India Standard Time (Asia/Kolkata)', Locale: 'English (India)', Language: 'English', Delegated Approver: ' ', Manager: ' ', Receive Approval Request Emails: 'Only if I am an approver', Federation ID: ' ', High-Contrast Palette on Charts: ' ', Load Lightning Pages While Scrolling: ' ', and several checkboxes for roles like Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Push Registrations (with a 'View' link), Data.com User Type (with a 'View' link), Accessibility Mode (Classic Only), Debug Mode, and High-Contrast Palette on Charts. At the bottom of the page, there's a URL: 'https://gayatridegreeandpgcollege-a-dev-ed.develop.my.salesforce.com/one/app#/aloharedirect/005100000Bsw2E?noredirect=1&isUserEntityOverride=1&sctp=p1'.

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.

User
ram ram

Name: ram ram
Alias: ram
Email: reddyohavanav@gmail.com [Verify] [\[i\]](#)
Username: reddyohavanav11042004@gmail.com
Nickname: ram [\[i\]](#)

Role: Agent
User License: Salesforce Platform
Profile: Agent
Active:
Marketing User:
Offline User:
Knowledge User:
Flow User:
Service Cloud User:
Site.com Contributor User:
Site.com Publisher User:
WDC User:
Mobile Push Registrations: [View](#) [\[i\]](#)

Data.com User Type: [View](#) [\[i\]](#)

Accessibility Mode (Classic Only): [\[i\]](#)
Debug Mode: [\[i\]](#)

High-Contrast Palette on Charts:
Load Lightning Pages While Scrolling:

12. [s://gayatridegreeandpgcollege-a-dev-ed.develop.my.salesforce.com/one/one.app#/alohaRedirect/005iT00000Bsw2J?noredirect=1&isUserEntityOverride=1&isDtp=p1](https://gayatridegreeandpgcollege-a-dev-ed.develop.my.salesforce.com/one/one.app#/alohaRedirect/005iT00000Bsw2J?noredirect=1&isUserEntityOverride=1&isDtp=p1)

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.

Q flows

Process Automation [1](#)

Flows [2](#)

Identity

Login Flows

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

Flow Trigger Explorer [New Flow](#) [3](#)

Flow Label	Process Type	Ac...	Te...	Package State	Pa...	Last Modified By	Last Modified ...
Ac Amount update	Autolaunched Flow	<input type="checkbox"/>	<input type="checkbox"/>	Unmanaged	Veera Venkata Varaprasad Androthu	07/06/2023, 11:35 am	
Book Appointment from Invitation	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Cancel Item Flow	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Change Case Owner to Incident Owner	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Close Change Request & Related Issues	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			

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

New Flow

Core All + Templates

1

Screen Flow
Guides users through a business process that's launched from Lightning pages, Experience Cloud sites, quick actions, and more.

Record-Triggered Flow
Launches when a record is created, updated, or deleted. This autolaunched flow runs in the background.

Schedule-Triggered Flow
Launches at a specified time and frequency for each record in a batch. This autolaunched flow runs in the background.

Platform Event—Triggered Flow
Launches when a platform event message is received. This autolaunched flow runs in the background.

Autolaunched Flow (No Trigger)
Launches when invoked by Apex, processes, REST API, and more. This autolaunched flow runs in the background.

Record-Triggered Orchestration
Launches when a record is created or updated. An orchestration lets you create a multi-step, multi-user process.

2

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

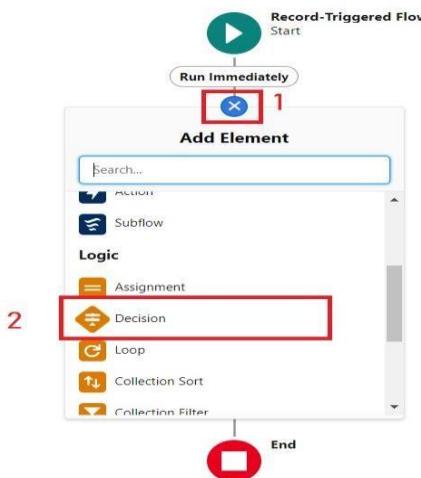
Update any record and perform actions, like send an email. This more flexible flow runs *after* the record is saved to the database.

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.

The 'Edit Decision' dialog is open. The 'Label' field contains 'field should updated'. The 'API Name' field contains 'field_should_updated'. The 'Description' field contains 'the field should be automatically updated'. The 'Outcomes' section shows four entries: 'dell', 'acer', 'hp', and 'mac'. The 'dell' entry is selected, showing its details: 'Label' (dell), 'Outcome API Name' (dell), and a condition 'All Conditions Are Met (AND)' with a single condition '\$Record > Laptop names' set to 'Equals' with value 'Dell'.

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.

Edit Decision

*Label field updated	*API Name field_updated																				
Description																					
<p>Outcomes For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.</p> <table border="1"> <tr> <th>OUTCOME ORDER</th> <th>+</th> <th>OUTCOME DETAILS</th> <th>Delete Outcome</th> </tr> <tr> <td>☰ dell core i3</td> <td></td> <td>*Label dell core i3</td> <td>*Outcome API Name dellcore_i3</td> </tr> <tr> <td>☰ dell core i5</td> <td></td> <td colspan="2">Condition Requirements to Execute Outcome All Conditions Are Met (AND)</td> </tr> <tr> <td>☰ dell core i7</td> <td></td> <td colspan="2"> Resource: \$Record > core type X Operator: Equals Value: core i3 </td> </tr> <tr> <td colspan="2">Default Outcome</td> <td colspan="2"></td> </tr> </table>		OUTCOME ORDER	+	OUTCOME DETAILS	Delete Outcome	☰ dell core i3		*Label dell core i3	*Outcome API Name dellcore_i3	☰ dell core i5		Condition Requirements to Execute Outcome All Conditions Are Met (AND)		☰ dell core i7		Resource: \$Record > core type X Operator: Equals Value: core i3		Default Outcome			
OUTCOME ORDER	+	OUTCOME DETAILS	Delete Outcome																		
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☰ dell core i5		Condition Requirements to Execute Outcome All Conditions Are Met (AND)																			
☰ dell core i7		Resource: \$Record > core type X Operator: Equals Value: core i3																			
Default Outcome																					
<input type="button" value="Cancel"/> <input type="button" value="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.

Edit Decision

*Label months selected	*API Name months_selected																					
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5	Resource \$Record > how many months	Operator Equals																				
	Value 1																					
<input type="button" value="Delete Outcome"/> <input type="button" value="Cancel"/> <input type="button" value="Done"/>																						

- 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.
- 36.
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																						
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<input type="button" value="Delete Outcome"/> <input type="button" value="Cancel"/> <input type="button" value="Done"/>																						

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.

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 +/-

acer core i3	* Label acer core i3	* Outcome API Name acer_core_i3
acer core i5		
acer core i7	Condition Requirements to Execute Outcome All Conditions Are Met (AND)	

Default Outcome

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

+ Add Condition

When to Execute Outcome ?

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

Cancel Done

Click done.

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	* API Name																					
acer months selected	acer_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>acer 1(i3)</td> <td>* Label acer 1(i3)</td> <td>* Outcome API Name acer_1_i3</td> </tr> <tr> <td>acer 2(i3)</td> <td></td> <td></td> </tr> <tr> <td>acer 3(i3)</td> <td>Condition Requirements to Execute Outcome All Conditions Are Met (AND)</td> <td></td> </tr> <tr> <td>acer 4(i3)</td> <td></td> <td></td> </tr> <tr> <td>acer 5(i3)</td> <td>Resource \$Record > how many months X</td> <td>Operator Equals</td> </tr> <tr> <td></td> <td>Value 1</td> <td></td> </tr> </tbody> </table>		OUTCOME ORDER	OUTCOME DETAILS	Delete Outcome	acer 1(i3)	* Label acer 1(i3)	* Outcome API Name acer_1_i3	acer 2(i3)			acer 3(i3)	Condition Requirements to Execute Outcome All Conditions Are Met (AND)		acer 4(i3)			acer 5(i3)	Resource \$Record > how many months X	Operator Equals		Value 1	
OUTCOME ORDER	OUTCOME DETAILS	Delete Outcome																				
acer 1(i3)	* Label acer 1(i3)	* Outcome API Name acer_1_i3																				
acer 2(i3)																						
acer 3(i3)	Condition Requirements to Execute Outcome All Conditions Are Met (AND)																					
acer 4(i3)																						
acer 5(i3)	Resource \$Record > how many months X	Operator Equals																				
	Value 1																					
<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

None—Always Update Record

Set Field Values for the Laptop Bookings Record

Field	Value
Amount_c	900

[+ Add Field](#)

Cancel

Done

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.

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		
hp core i3	*Label hp core i5	*Outcome API Name hp_core_i5	
hp core i5	Condition Requirements to Execute Outcome All Conditions Are Met (AND)		
hp core i7	Resource \$Record > core type	Operator Equals	Value core i5
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 on done.

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

Edit Update Records

one month of hp i5 rate (one_month_of_hp_i5_rate) 

* How to Find Records to Update and Set Their Values

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

Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record

Set Field Values for the Laptop Bookings Record

Field	Value	Actions
Amount_c	1700	

[+ Add Field](#)

[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											
<p>Outcomes For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.</p> <table border="1"> <tr> <td>OUTCOME ORDER ① +</td> <td>OUTCOME DETAILS</td> </tr> <tr> <td>mac laptop</td> <td>* Label mac laptop * Outcome API Name mac_laptop</td> </tr> <tr> <td>Default Outcome</td> <td>Condition Requirements to Execute Outcome All Conditions Are Met (AND)</td> </tr> <tr> <td></td> <td>Resource \$Record > core type Operator Equals Value Bionic chip</td> </tr> <tr> <td></td> <td>+ Add Condition</td> </tr> </table>		OUTCOME ORDER ① +	OUTCOME DETAILS	mac laptop	* Label mac laptop * Outcome API Name mac_laptop	Default Outcome	Condition Requirements to Execute Outcome All Conditions Are Met (AND)		Resource \$Record > core type Operator Equals Value Bionic chip		+ Add Condition
OUTCOME ORDER ① +	OUTCOME DETAILS										
mac laptop	* Label mac laptop * Outcome API Name mac_laptop										
Default Outcome	Condition Requirements to Execute Outcome All Conditions Are Met (AND)										
	Resource \$Record > core type Operator Equals Value Bionic chip										
	+ 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	Actions
mac bionic chip(1)	*Label: mac bionic chip(1) *Outcome API Name: mac_bionic_chip_1	Delete Outcome
mac bionic chip(2)		
mac bionic chip(3)		
mac bionic chip(4)		
mac bionic chip(5)		
Default Outcome		

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

Resource: \$Record > how many months **Operator**: Equals **Value**: 1

+ Add Condition

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: 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 rate6800, 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

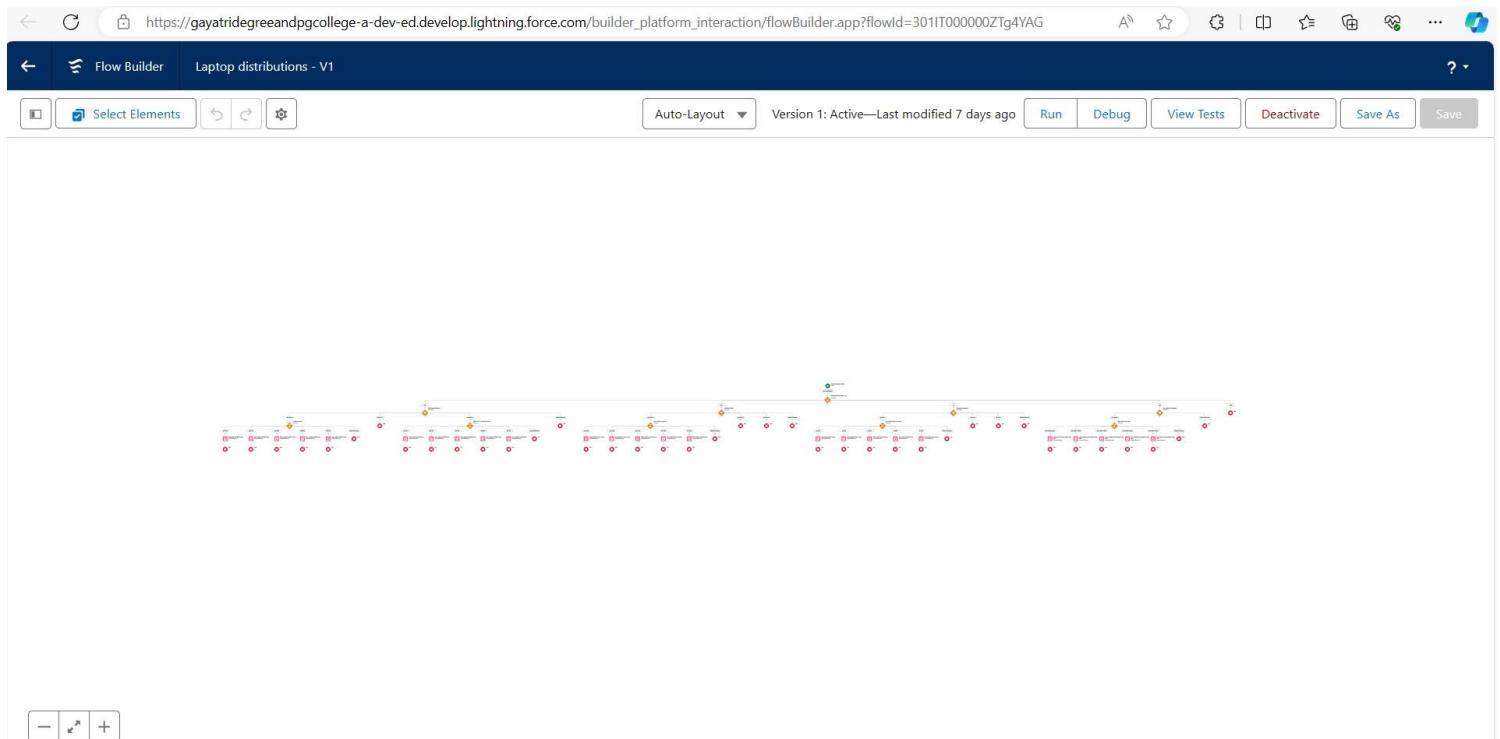
Set Field Values for the Laptop Bookings Record

Field	Value
Amount__c	2000

Cancel Done

Click done.

FLOW:



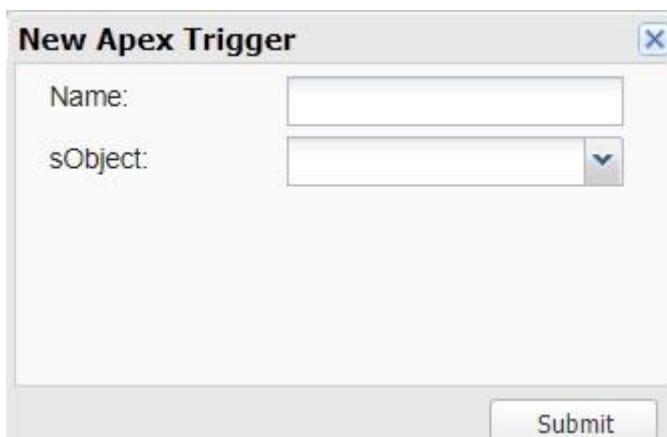
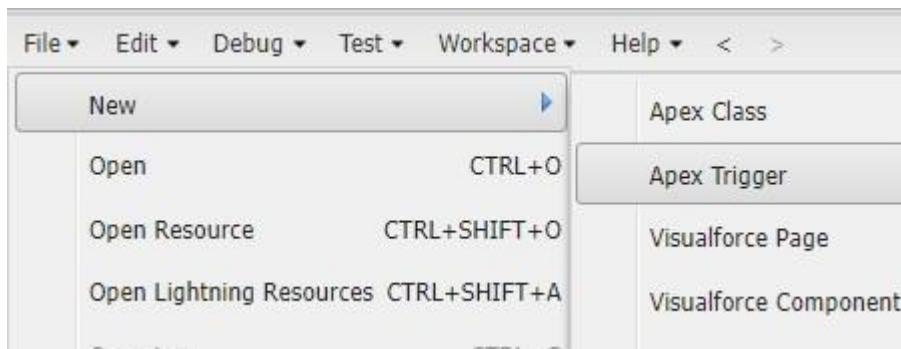
Click on save .

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

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);  
    }  
  
}
```

Developer Console - Personal - Microsoft Edge

https://gayatridegreeandpgcollege-a-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage

File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < ▾ >

LaptopBooking.apxt * LaptopBookingHandler.apxt *

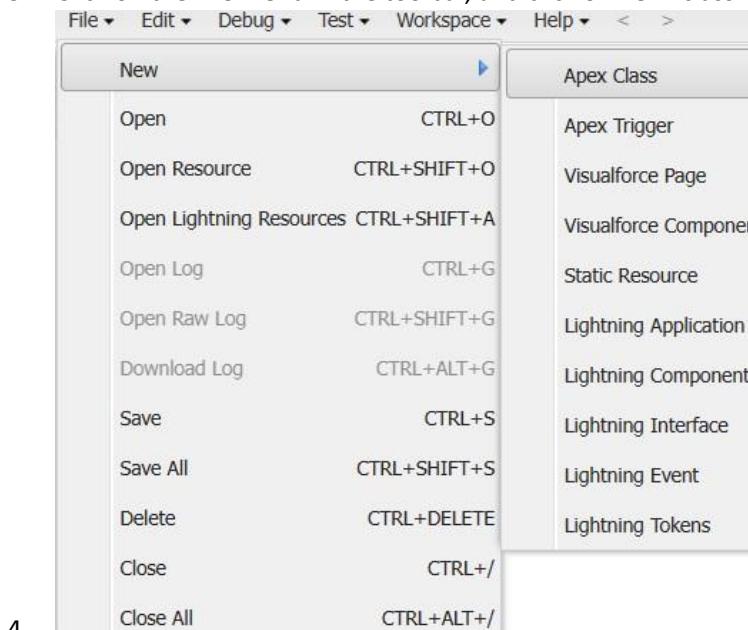
Code Coverage: None API Version: 60

```

1 trigger LaptopBooking on Laptop_Bookings__c (After insert,after update) {
2
3
4
5     if(trigger.isAfter && ( trigger.isInsert || trigger.isupdate))
6     {
7
8         LaptopBookingHandler.sendEmailNotification(trigger.new);
9
10    }
11
12
13
14
15 }
```

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. 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});

}
}
}

```

Developer Console - Personal - Microsoft Edge
 https://gayatrigradegreeandpgcollege-a-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage

LaptopBooking.apxt * LaptopBookingHandler.apxt *

Code Coverage: None API Version: 60 Go To

```

1 public class LaptopBookingHandler {
2
3     public static void sendEmailNotification (List<Laptop_Bookings__c> lapList){
4
5         for(Laptop_Bookings__c lap:lapList)
6
7         {
8
9             Messaging.SingleEmailMessage email = new Messaging.SingleEmailMessage();
10
11             email.setToAddresses( new List<String>{lap.Email__c});
12
13             email.setSubject('Welcome to our company');
14
15             string body = 'Dear ' +lap.Name +', \n';
16
17             body += 'Welcome to Laptop Rentals! You have been seen as a valuable customer to us.\n Please continue your journey with us, while we';
18
19             email.setPlainTextBody(body);
20

```

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).

Rank	Item	Action
1	Pandora	
2	codehub	
3	infosys	
4	zoho	
5	hcl	
6	samsung	
7	Smartinternz	
8	Salesforce	
9	TCS	
10	Capgemini	
11	Starbucks	

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.

The screenshot shows the SAP BusinessObjects Report Builder interface. The top navigation bar includes 'LAPTOPRENTALS', 'Total Laptops', 'consumers', 'Laptop Bookings', 'Billing Process', and 'Report Builder'. The main area displays a report titled 'consumers with Laptop Bookings and Total Laptops'. The report table has the following structure:

	Laptop Bookings: Laptop Bookings Name	consumer: consumer Name	Total no of l...	Laptop names	core type	Amount
intermediate (6)	smartinternz	suny	50	Dell	core i3	₹3,000
	smartinternz	sure	50	Dell	core i7	₹4,000
	smartinternz	rakesh	50	Dell	core i5	₹3,000
	smartinternz	suny	50	Acer	core i3	₹2,700
	stacknexus	sure	50	Acer	core i3	₹3,600
Subtotal	Sandeep	uday	50	Acer	core i3	₹1,800
						₹18,100
high (8)	smartinternz	rakesh	50	Mac	Bionic chip	₹8,000
	smartinternz	sure	50	Acer	core i5	₹6,500
	google	rushi	50	Dell	core i5	₹6,000
	Flash	suny	50	Acer	core i7	₹7,200
	shivam	rushi	50	Hp	core i3	₹6,000
	code hub	uday	50	Mac	Bionic chip	₹8,000
	code hub	rushi	50	Mac	Bionic chip	₹8,000
	smartinternz	sure	50	Hp	core i5	₹5,100

The left sidebar shows 'Outline' selected, with sections for 'Groups' (GROUP ROWS, GROUP COLUMNS) and 'Columns' (Add column...). The 'Filters' section shows 'types of versions' with a dropdown and a count of 2. The bottom of the screen has buttons for 'Row Counts', 'Detail Rows', 'Subtotals', and 'Grand Total'.

Edit Bucket Column

* Field	* Bucket Name
Amount	X types of versions

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

Treat empty Amount values in the report as zeros.

[Cancel](#) [Apply](#)

8.

9. Click apply it.

10. Save the Report

11. Name: consumer with laptops and total laptops

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

Total Records: 11 Total Amount: ₹82,300

	consumer: consumer_name	Total No Of Laptops: Total Laptops	Laptop Bookings: Laptop Bookings	Address	Phone number	Laptop Names	core type	Amount
Subtotal								₹5,800
Subtotal								₹8,500
Subtotal								₹27,500
Row Counts	Detail Rows	Subtotals	Grand Total					

12.

Sharing Report To Owner

Click edit drop down and select subscribe option

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

Total Records Total Amount
11 ₹82,300

	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	

gayatridgeeandpgcollege-a-dev-ed.develop.lightning.force.com/.../lightningReportApp.app?...

2. Follow as per below image.

Edit Subscription

Settings

Frequency

Daily Weekly Monthly

Time

8:00 am

Attachment

Attach File

Recipients

Send email to

Me

Edit Recipients

Run Report As

Me Another Person

Cancel Save

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

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

Total Records Total Amount
11 ₹82,300

<input type="checkbox"/> <input checked="" type="checkbox"/> 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
Row Counts	<input checked="" type="checkbox"/>	Detail Rows	<input checked="" type="checkbox"/>	Subtotals	<input checked="" type="checkbox"/>	Grand Total	<input checked="" type="checkbox"/>	

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.

New Dashboard

* Name

data analytics of laptops

Description

total amount of data in dashboards

Folder

total rents amount

Select Folder

Cancel

Create

3. Select add component.

4. Select a Report and click on select.

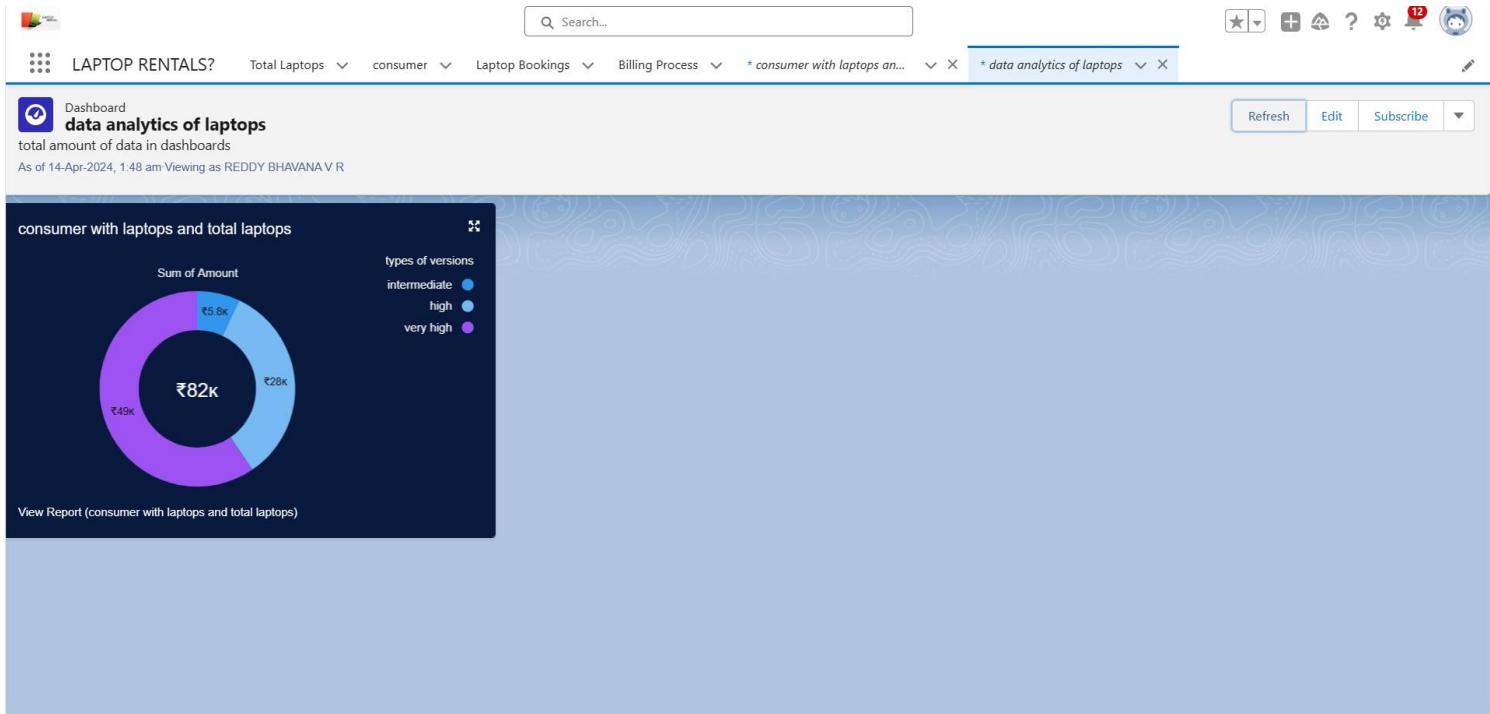
The screenshot shows a dashboard editor interface. At the top, there's a navigation bar with various filters like 'Total Laptops', 'consumer', 'Laptop Bookings', 'Billing Process', and a search bar. Below the navigation, the dashboard title is 'data analytics of laptops'. A report card titled 'consumer with laptops and total laptops' is displayed, featuring a donut chart with segments labeled '₹82k', '₹28k', and '₹49k'. To the right of the report card, a modal window titled 'Edit Component' is open. Inside the modal, there's a preview of the report card. The 'Report' section contains a dropdown menu set to 'consumer with laptops and total laptop'. Below it, there are settings for 'Display As' (with a preview of a bar chart), 'Value' (set to 'Sum of Amount'), and 'Sliced By' (set to 'types of versions'). The preview shows the same report card with the donut chart and its segments. At the bottom of the modal are 'Cancel' and 'Update' buttons.

6. Select the dark component and add to the dashboards.

7. Save it.

8. Click done.

Result:



THE END