SALESFORCE

A CRM APPLICATION FOR LAPTOP RENTALS

Objective:

To design and develop a **CRM application tailored for laptop rental services** that streamlines customer management, tracks rental history, manages inventory, automates billing, and enhances customer engagement. The application aims to provide an efficient, user-friendly solution that improves operational efficiency, reduces manual effort, and ensures seamless communication between the business and its clients.

Use case:

Creating a Salesforce Developer Edition org allows developers to experiment, innovate, and build customized solutions within a controlled environment. With access to Salesforce's powerful development tools and features, developers can prototype, test,and refine their applications, empowering them to deliver robust and tailored solutions to meet unique business requirements. As a Salesforce Administrator for The SmartBridge you must have a Salesforce developer edition org in order to do all the required works which the CEO desires for TheSmartBridge. Before creating our developer account, we must know what are the types of Editions Salesforce offers

Creating Developer Account:

Creating a developer org in salesforce.

1. Go to https://developer.salesforce.com/signup

2. On the sign up form, enter the following details :

1) First name & Last name 3) Role : Developer

2) Email

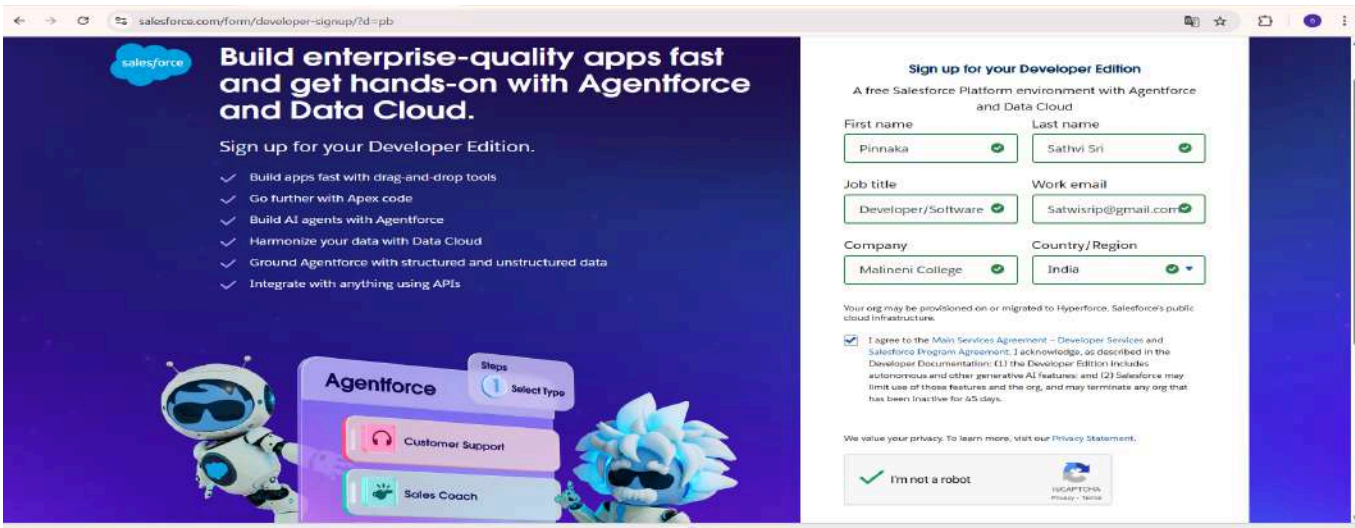
3) Role : Developer

4) Company : College Name

5) Country : India

6) Postal Code : pin code

7) Username : should be a combination of your name and company

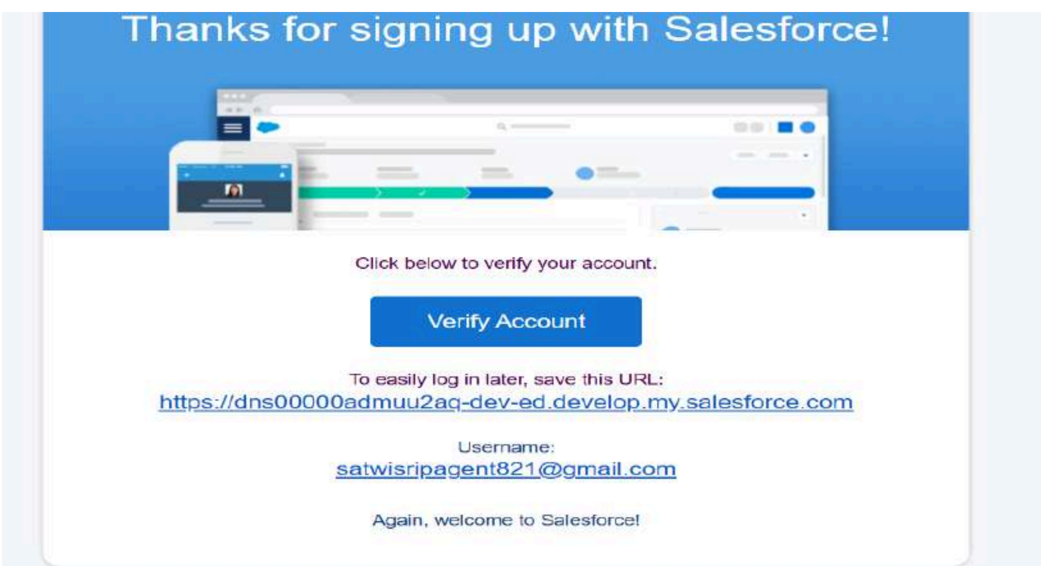


This need not be an actual email id, you can give anything in the format : username@organization.com

Click on sign me up after filling these

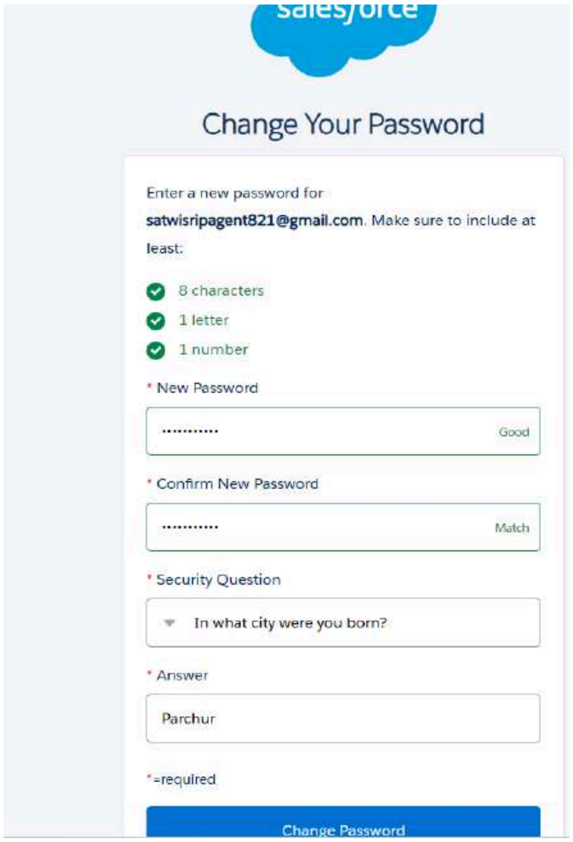
Account Activation

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

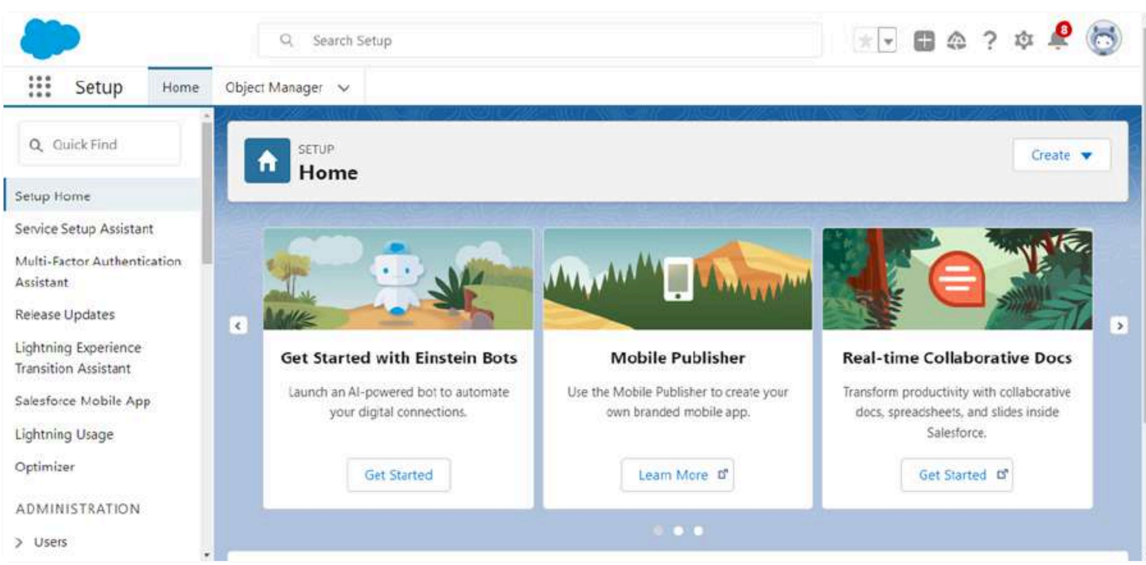


2. Click on Verify Account.

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



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



Object Creation:

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

Salesforce objects are of two types:

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

Create Total Laptops Object

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

   1) Enter the label name>> Total Laptops

   2) Plural label name>> Total Laptops

   3) Enter Record Name Label and Format

      Record Name >>Total Laptops

      Data Type >> Text

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

Create consumer Object

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

1) Enter the label name >> consumer

2) Plural label name >> consumer

3) Enter Record Name Label and Format

Record Name >> consumer_name

Data Type >> Name

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

Create Laptop Bookings Object

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

1) Enter the label name >> Laptop Bookings

2) Plural label name >> Laptop Bookings

3) Enter Record Name Label and Format>>Record Name >> Laptop Bookings>>Data Type >> Name
4)Click on Allow reports,Allow search and Track Field History,
5)Allow search >> Save.

Create Billing Process Object

1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
2. Enter the label name >> Billing Process
3.Plural label name >> Billing Process
4. Enter Record Name Label and Format
5. Record Name >> Billing ProcessName ->Data Type >> Name
6. Click on Allow reports,Allow search and Track Field History>>Allow search >> Save.

Tabs:

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

Types of Tabs:

1. Custom Tabs: Custom object tabs are the user interface for custom applications that you build in salesforce.com. They look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.

2. Web Tabs: Web Tabs are custom tabs that display web content or applications embedded in the salesforce.com window. Web tabs make it easier for your users to quickly access content and applications they frequently use without leaving thesalesforce.com application.

3. Visualforce Tabs: Visualforce Tabs are custom tabs that display a Visualforce page. Visualforce tabs look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.

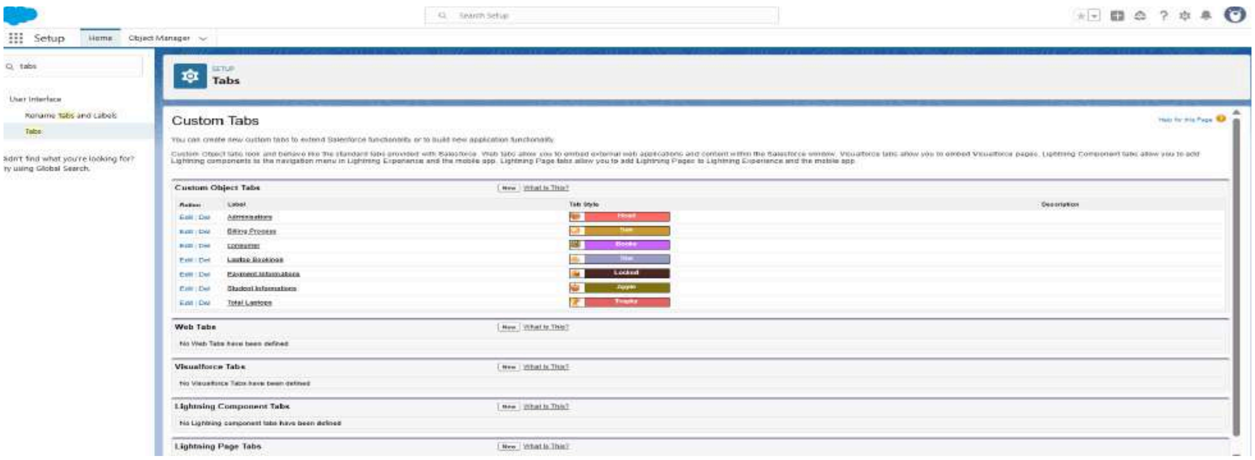
4. Lightning Component Tabs: Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app.

5. Lightning Page Tabs: Lightning Page Tabs let you add Lightning Pages to the mobile app navigation menu.Lightning Page tabs don't work like other custom tabs. Once created, they don't show up on the All Tabs page when you click the Plus icon that appears to the right of your current tabs. Lightning Page tabs also don't show up in the Available Tabs list when you customize the tabs for your apps.

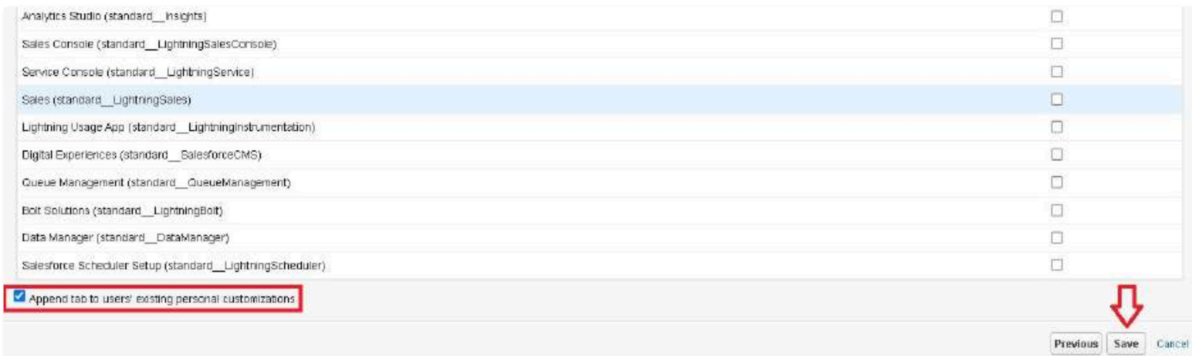
Creating a Custom Tab:

To create a Tab:( )

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. Clicksave.



Activity 2:

Creating Remaining Tabs Now create the Tabs for the remaining Objects, they are "consumer,Laptop Booking,Billing process".

Follow the same steps as mentioned in Activity -1 .

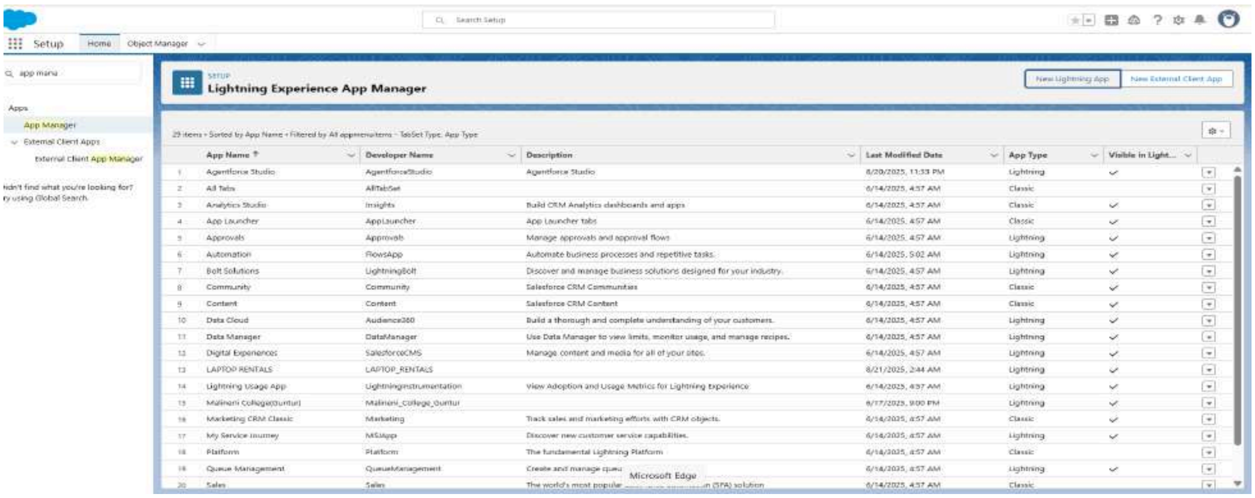
The Lightning App:

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

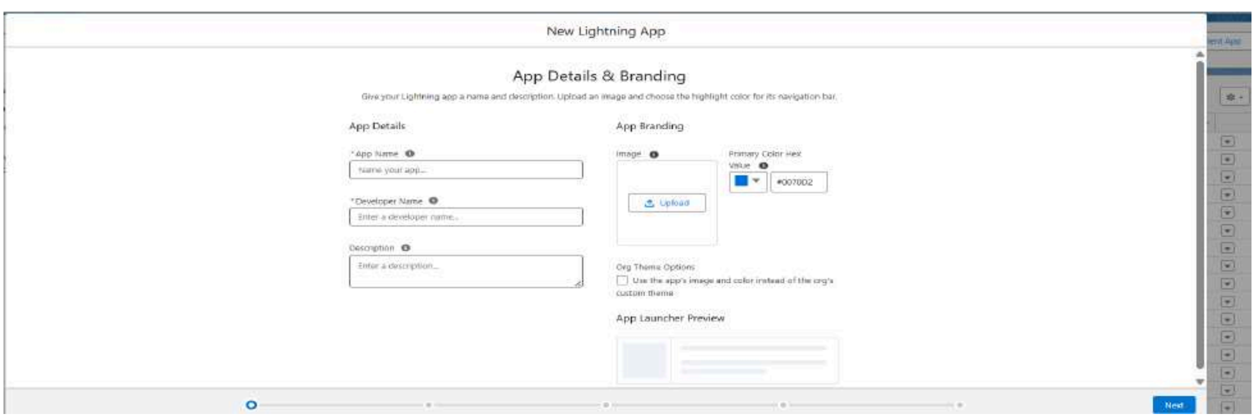
Create a Lightning App

To create a lightning app page:

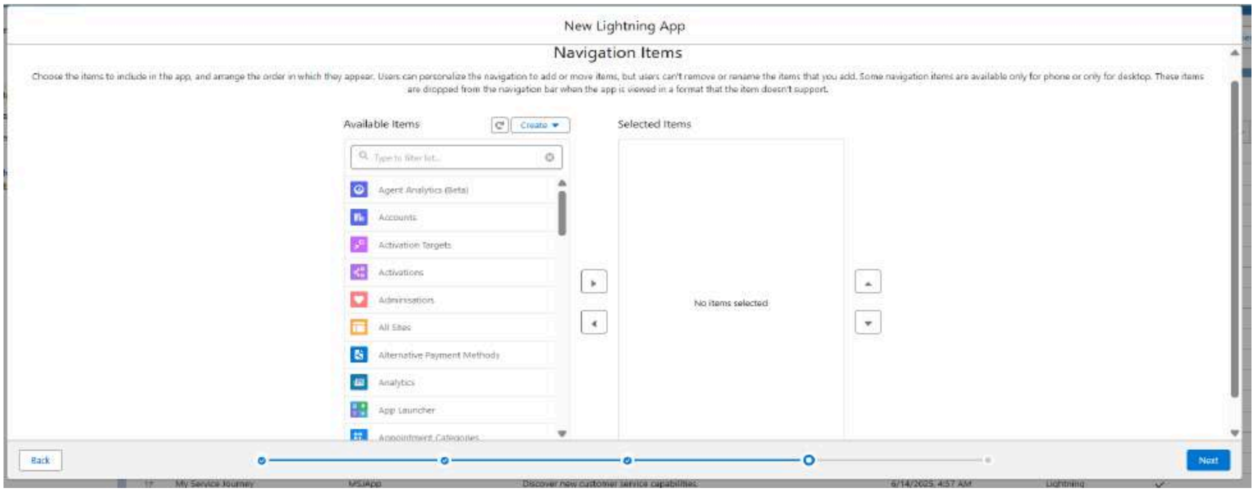
1. Go to setup page >> search “app manager” in quick find >> select “app manager” >> click on New lightning App.



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.

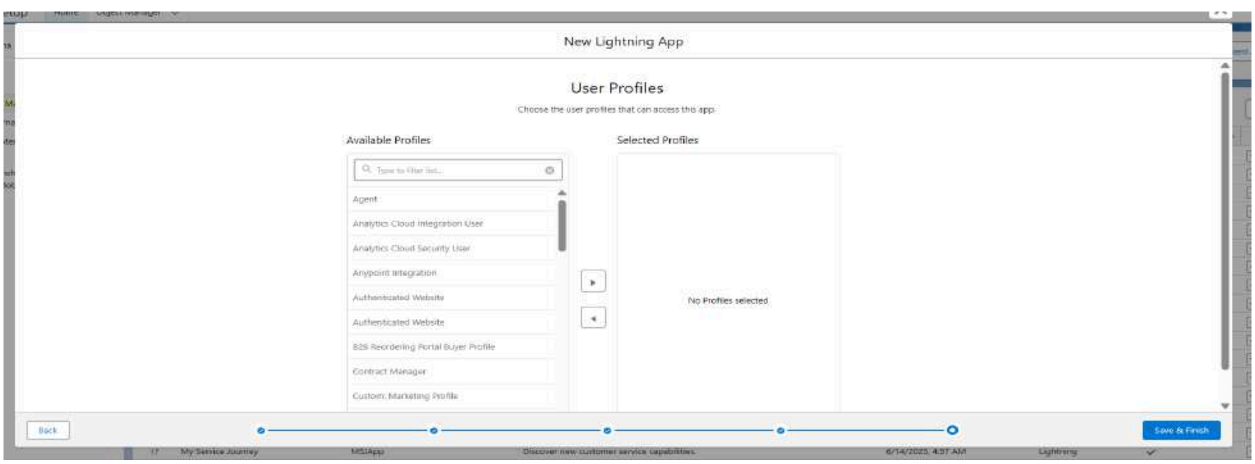


*Upload a photo that is related to your app>>To Add Navigation Items:



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

4. To Add User Profiles:



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

Fields

In Salesforce, **fields** store data for objects (like columns in a database) and make searching, editing, and managing records easier.

Types of Fields

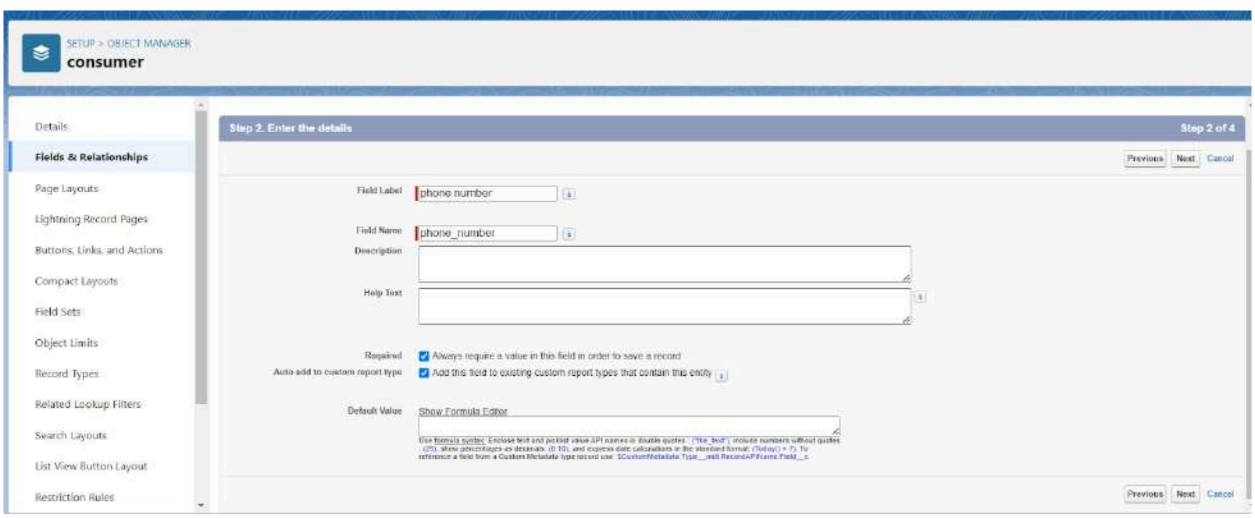
1. **Standard Fields** – Predefined by Salesforce, used for common tasks. Some cannot be deleted (e.g., *Created By, Owner, Last Modified, Field at Object Creation*).
2. **Custom Fields** – User-defined and flexible. Organizations can add or remove them based on their business needs.

Creating the field in consumer object:

1. To create fields in an object:

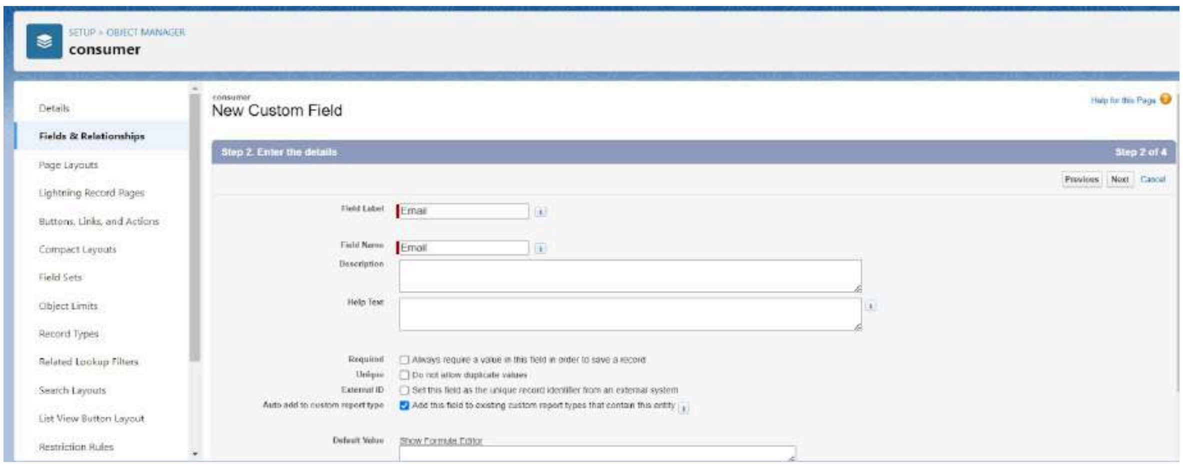
a. Go to setup >> click on Object Manager >> type object name(consumer) in search bar >> click on the object.
a. Now click on “Fields & Relationships” >> New
b. Select Data Type as a “Phone”
c. Click on next
d. Fill the Above as following:

- Field Label: Phone number
- Field Name : gets auto generated
- Click the required option checkbox.
- Click on Next >> Next >> Save and new.



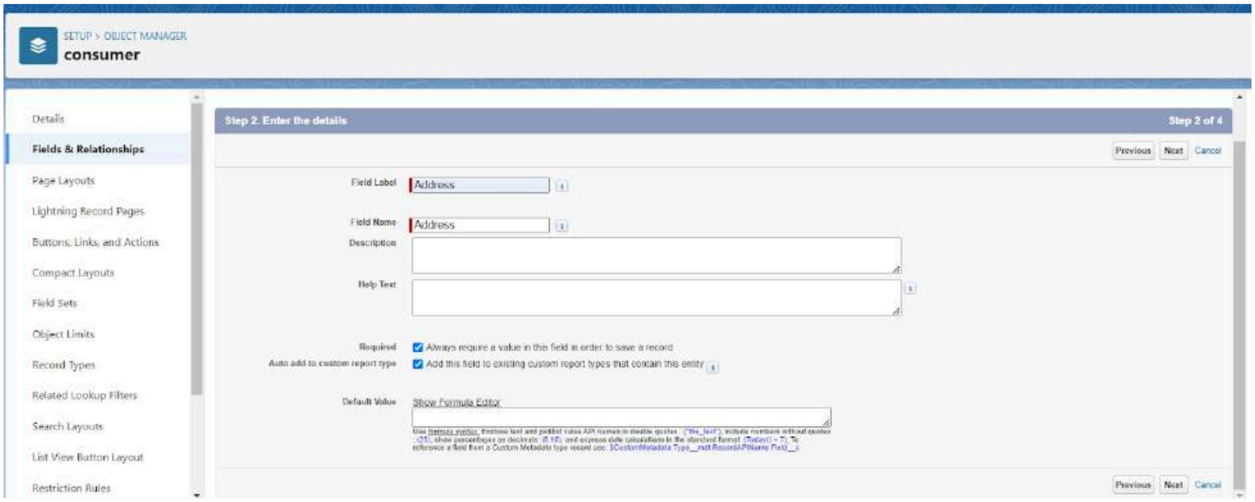
2. To create another fields in an object:

a. Go to setup >> click on Object Manager >> type object name(consumer) in search bar >> click on the object.
b. Now click on “Fields & Relationships” >> New
c. Select Data type as a “Email” and Click on Next
d. Fill the Above as following:
- Field Label: Email
- Field Name :It’s gets auto generated
- Click on Next >> Next >> Save and new.



3. To create another fields in an object:

a. Go to setup >> click on Object Manager >> type object name(consumer) in search bar >> click on the object.
b. Now click on “Fields & Relationships” >> New
c. Select Data type as a “Text Area” and Click on Next
d. 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.



4. To create another fields in an object:

a. Go to setup >> click on Object Manager >> type object name(consumer) in search bar >> click on the object.
b. Now click on “Fields & Relationships” >> New
c. Select Data type as a “Picklist” and Click on Next
d. Fill the Above as following:
- Field Label: consumer Status
- Value - Select enter values with each value separated by a new line

a. Student
b. Employee
c. Others and select required

Field Name :It’s gets auto generated>>Click on Next >> Next >> Save and new.

Creating the field in Laptops Bookings object:

1. To create fields in an object:

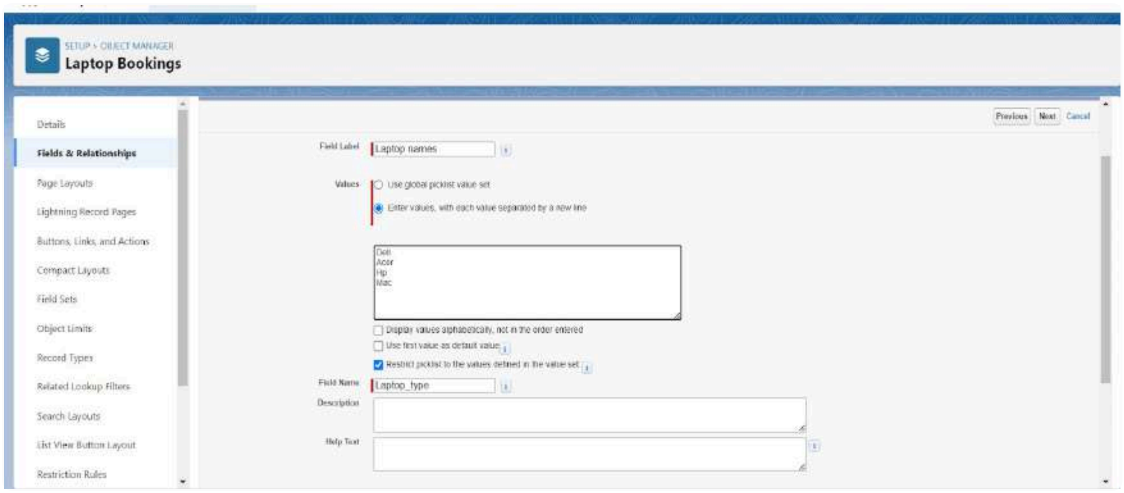
Go to setup >> click on Object Manager >> type object name(Laptop Booking) in the search bar >> click on the object.

Now click on “Fields & Relationships” >> New

Select Data Type as a “Picklist”

Label: Laptop Names

Picklist values are : 1. Dell   2. Hp   3. Acer 4. Mac

:


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

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

To create fields & relationship to an object:

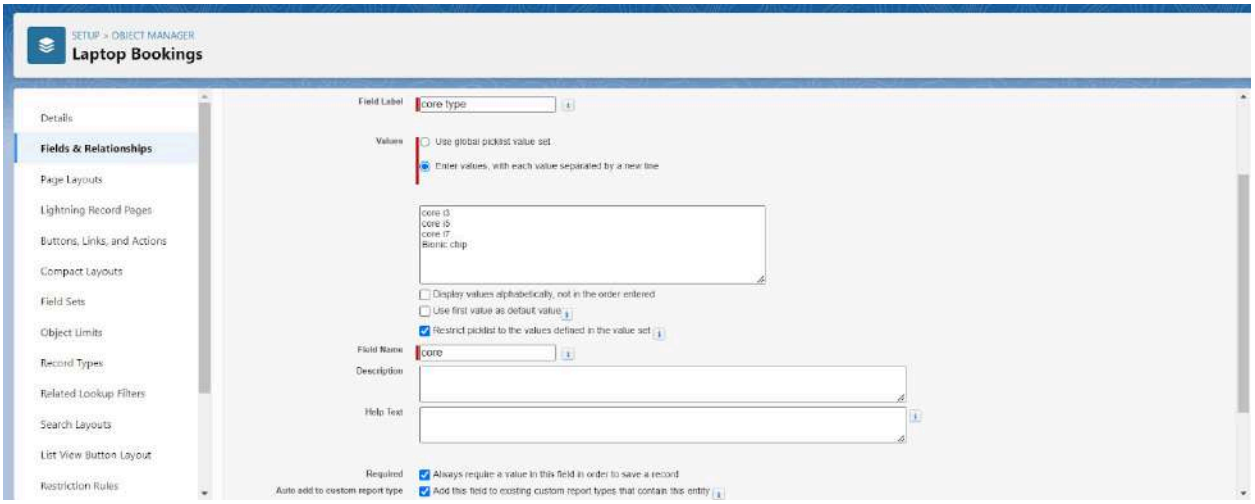
1.Go to setup >> click on Object Manager >> type object name(Laptop Booking) in the search bar >> click on the object.

2.Now click on “Fields & Relationships” >> New

3.Select Data Type as a “Picklist” and Label: Core Type

4.Picklist values are:-1.core i3   2. Core i5   3. Core i7 4.Bionic Chip .

5.Select required



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

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.

3. To Create a Field Dependency in the Laptop Booking Object

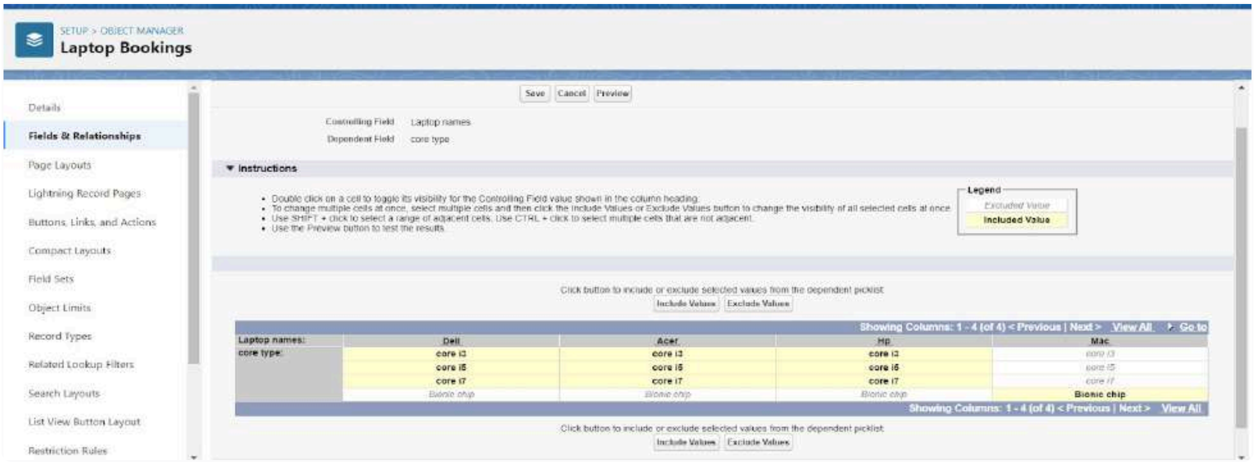
To create field dependency to an object:

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. Select **Controlling Field** as Laptop Names and **Dependent Field** as Core Type

4. Click the include value for dell-core i3,i5,i7 and for acer i3,i5,i7 and for hp i3,i5,i7 and also for mac bionic chip include the values for it.



Click save.

To Create a Fields & Relationship to an Laptop Booking and Total Laptops Objects:

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 “Master-Detail Relationship”
4. Click on Next
5. Click on the Related to drop down and Select the “consumer” object and click on Next
6. Fill the Above as following:

- Change the Field Label: Consumer
- 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

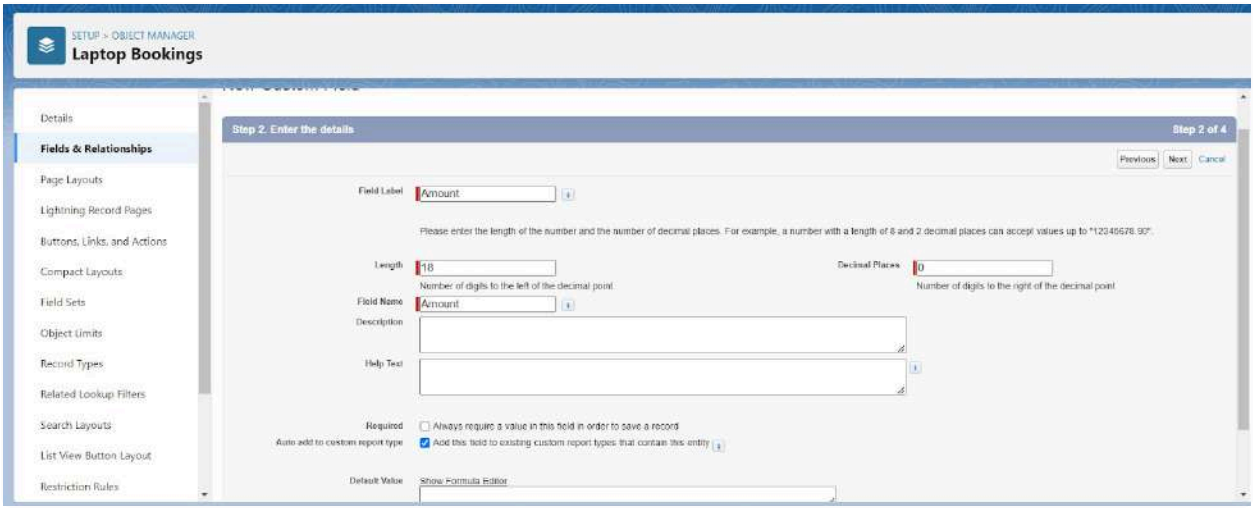
4.Select Data Type as a “Currency”

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



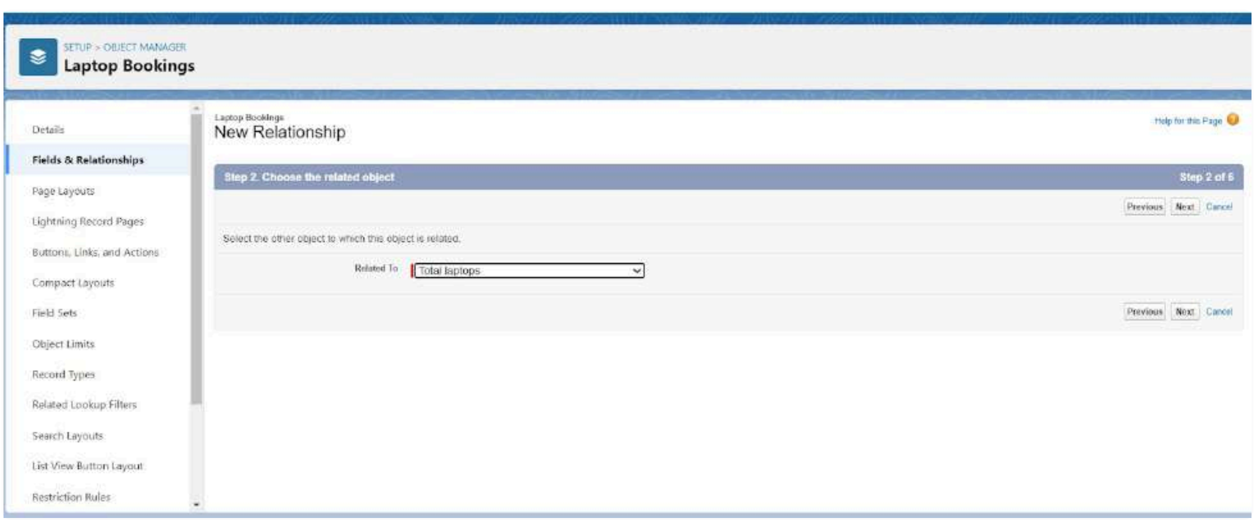
To Create a Fields & Relationship to an Object

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

2. Now click on "Fields & Relationships" >> New

3. Select Data Type as a "Lookup Relationship"

4. Click on Next



5. Click on the Related to drop down and Select the "Total Laptops" object and click on

Next

Fill the Above as following:

- Change the Field Label: Total No Of Laptops
- Field Name :It’s gets auto generated
- Click on Next >> Next >> Save and new.

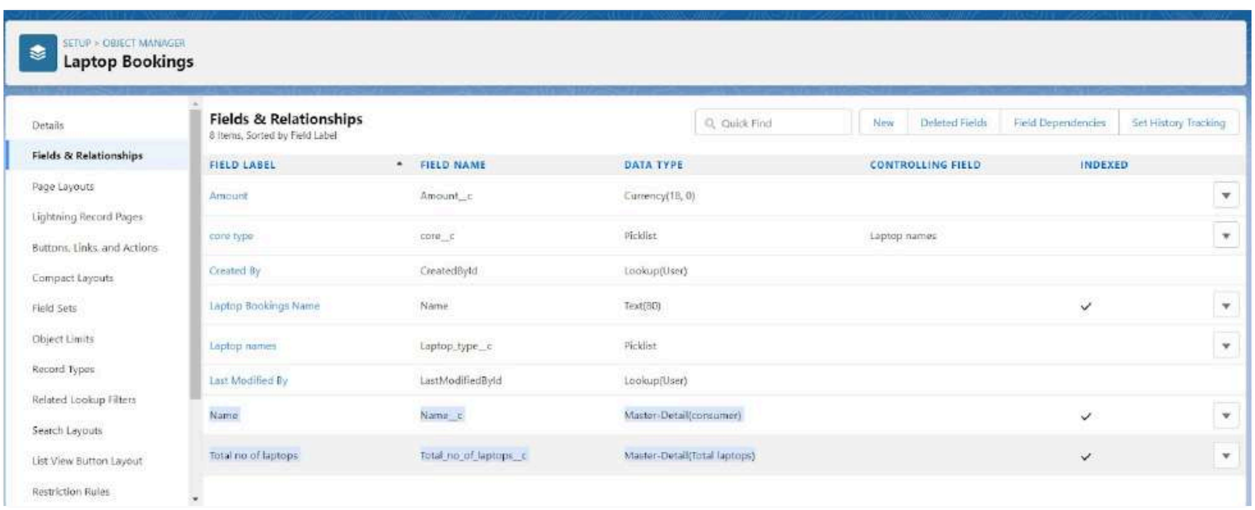
To Create a Fields & Relationship to an Laptop Booking Object: To create fields & relationship to an object:

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

7. Now click on “Fields & Relationships” >> New

8. Select Data Type as a “Email”

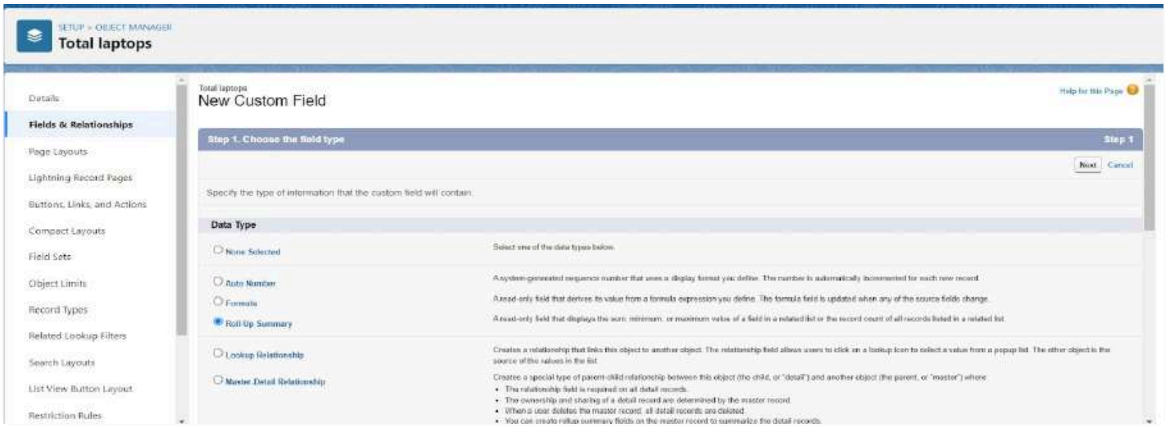
9. Click on Next and save it.



To Create a Rollup Summary Field in “Total Laptops Object”

1. After Creating the Master-Detail 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.

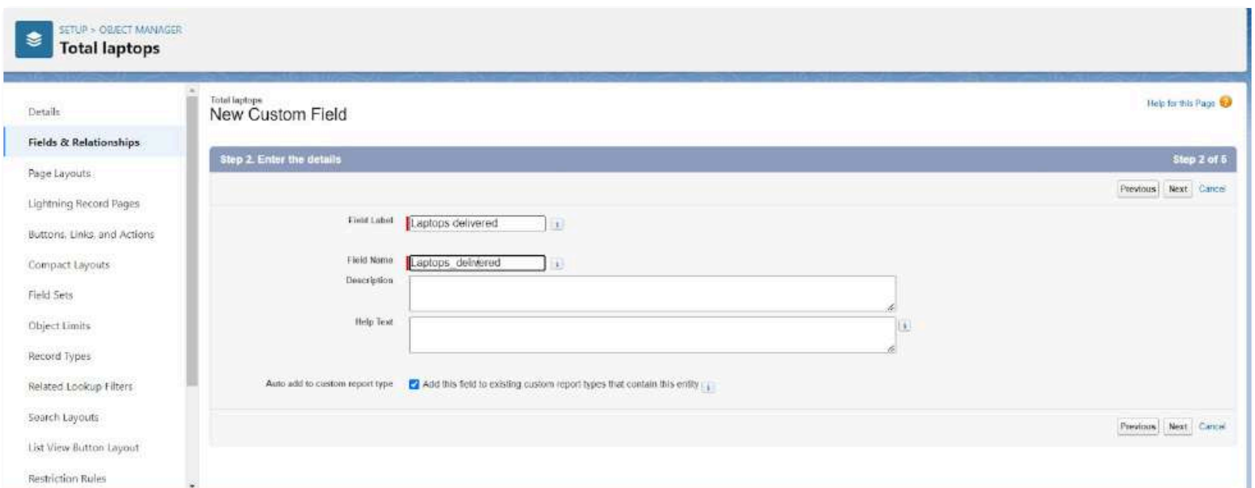
3. Now click on “Fields & Relationships” >> New



4. Select Data type as a “Roll-up Summary” and Click on NextFill the Above as following:

Field Label: Laptops delivered

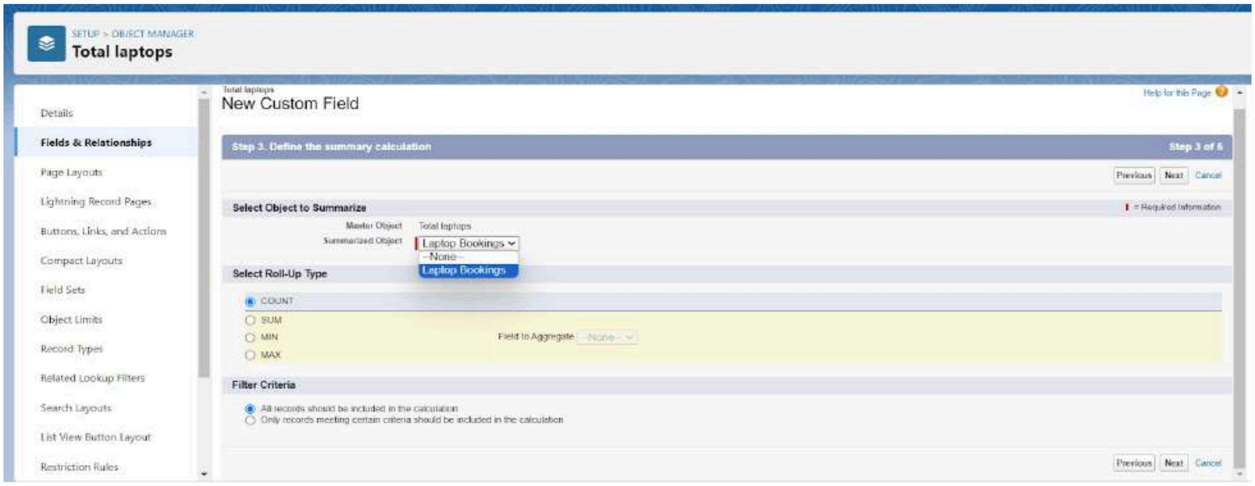
Field Name :It’s gets auto generated



Click on Next

5. Select the Laptop Bookings in the Summarized Object

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

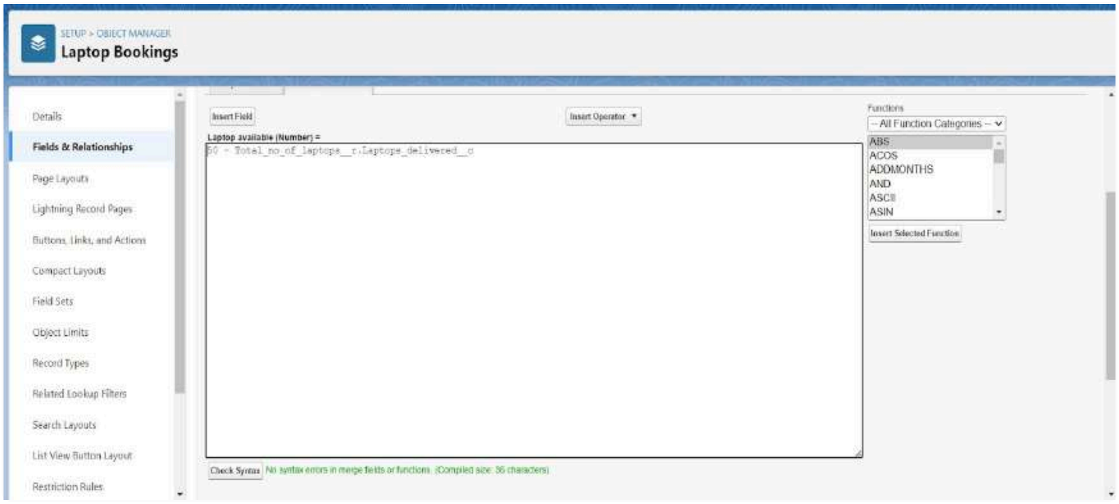


To create fields in an object:

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

1. Now click on "Fields & Relationships" >> New
2. Select Data type as a "Formula" and Click on Next
3. 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:

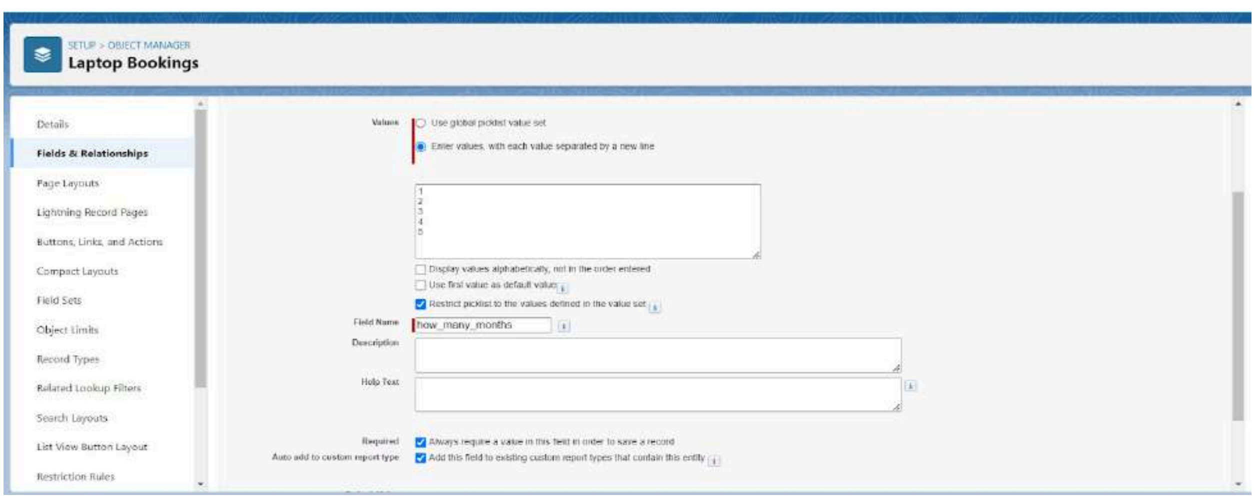
1.Go to setup >> click on Object Manager >> type object name(Laptop Booking) in the search bar >> click on the object.

2. Now click on “Fields & Relationships” >>New

3. Select Data Type as a “picklist” and Label: how many months

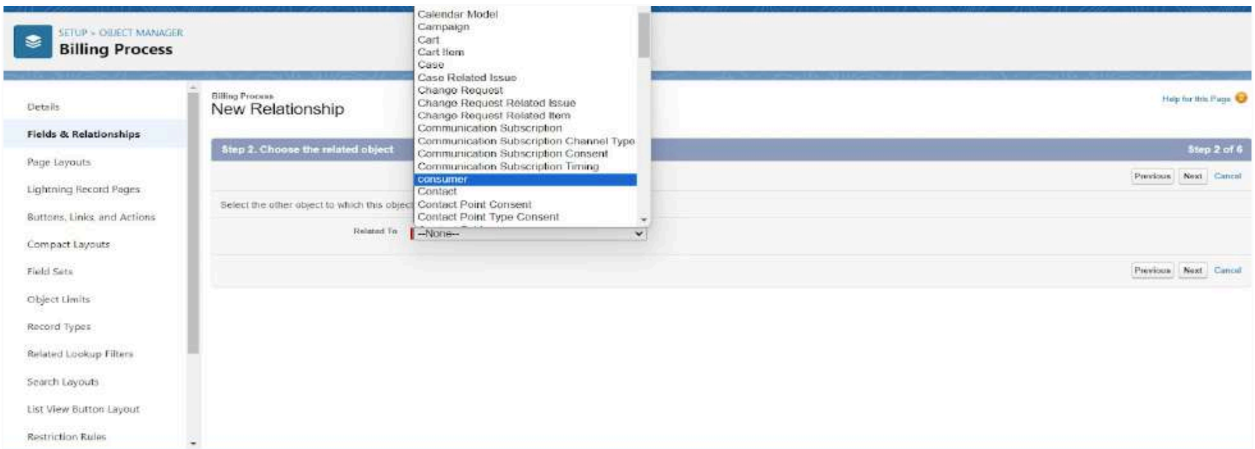
4. Picklist values are 1.2.3.4.5

5. Click and save it.



Creation of Fields & Relationship for Billing Process Object:1. To create fields & relationship to an object:Go to setup >> click on Object Manager >> type object name(Billing Process) in the search bar >> click on the object.

a. Now click on “Fields & Relationships” >> New
b. Select Data Type as a “Master-detail Relationship”
c. Click on Next
d. Click on the Related to drop down and Select the consumer object and click on Next

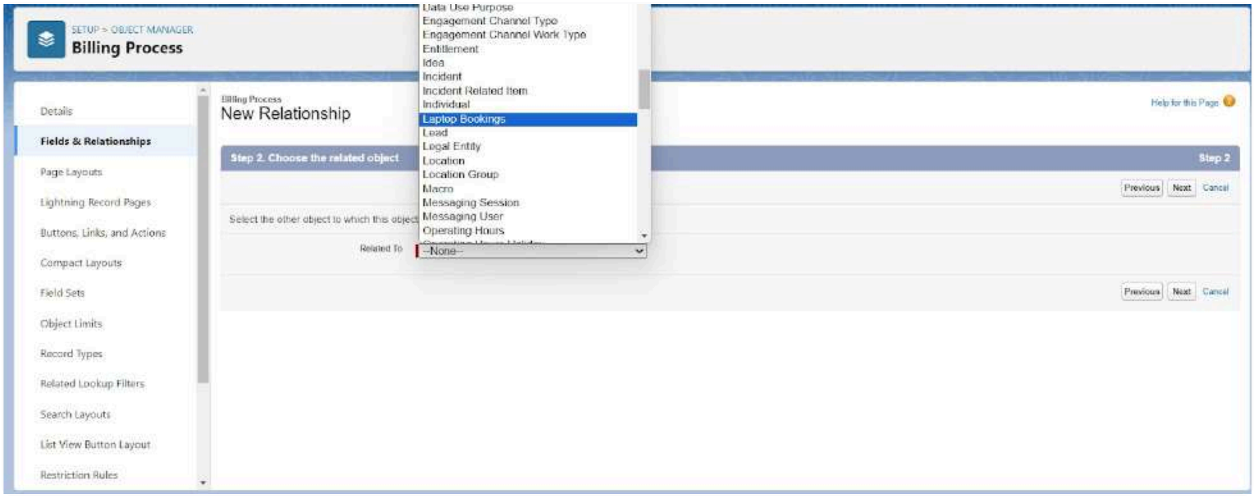


Fill the Above as following:

- 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:

a. Go to setup >> click on Object Manager >> type object name(Billing Process) in the search bar >> click on the object.
b. Now click on “Fields & Relationships” >> New
c. Select Data Type as a “Lookup Relationship”
d. Click on Next
e. Click on the Related to drop down and Select the Laptop Booking object and click on Next



f. 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.

Creation of another fields for the billing process object:

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Billing Process) in the search bar >> click on the object.

2. Now click on "Fields & Relationships" >> New

3. Select Data Type as a "Picklist"

Fill the Above as following:

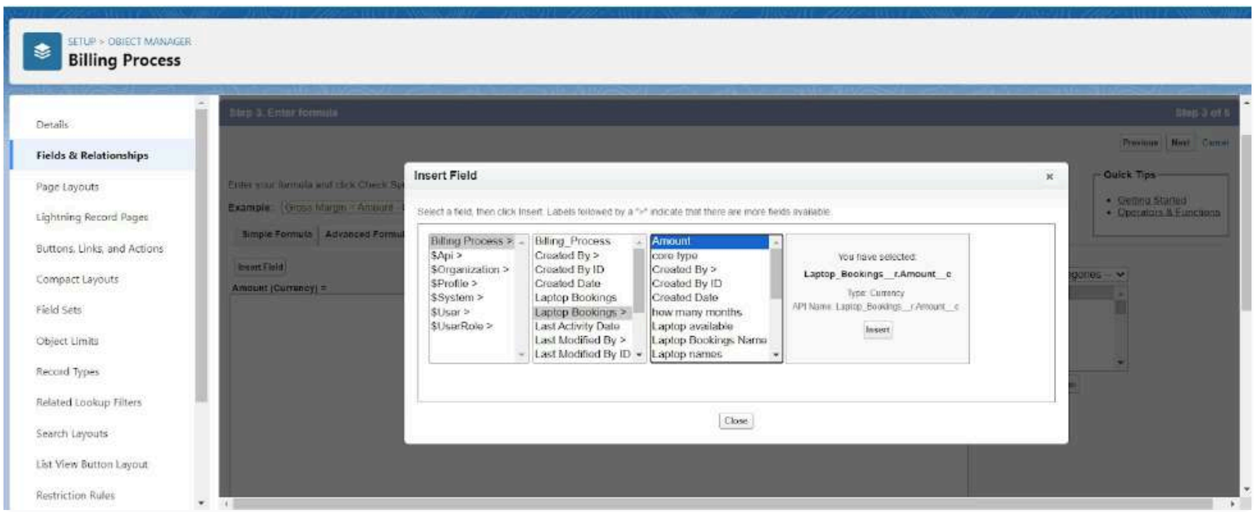
- Field Label: Payment Mode
- Value >> Select enter values with each value separated by a new line

a. Cash
b. Check
c. Credit card
d. Debit card
e. UPI
f. Phonepe

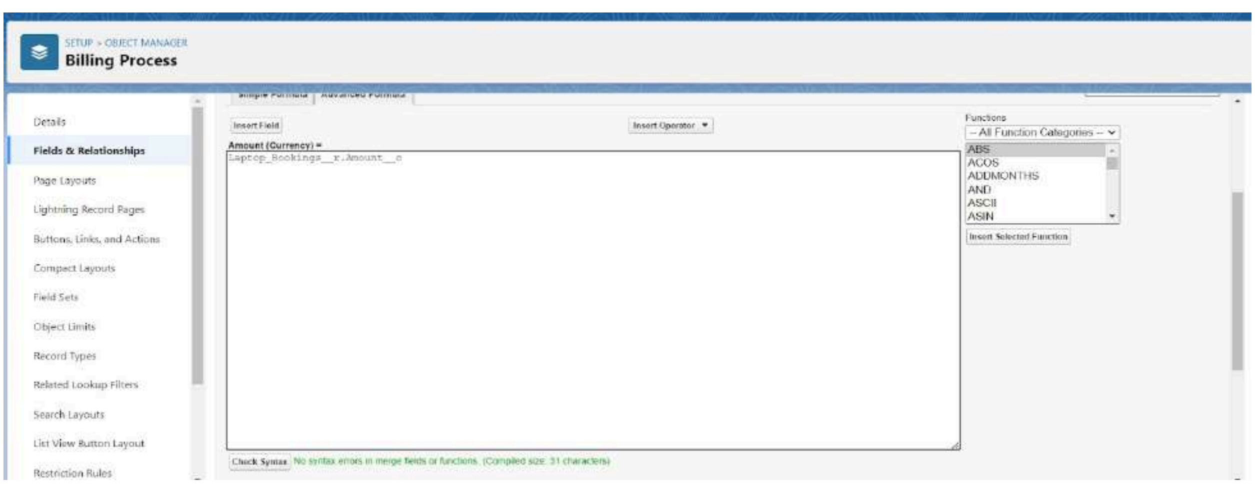
g. Gpay
h. Paytm
- Select required
- Click on Next >> Next >> Save and new.

Cross Object Formula Field:**Steps to create in *Billing Process* object:**

1. Go to **Setup** → **Object Manager** → **Billing Process**.
2. Click **Fields & Relationships** → **New** → **Formula**.
3. Enter **Field Label: Amount** (return type: Currency).
4. In **Advanced Formula**, click **Insert Field** → select:
   - **Billing Process** → **Laptop Booking** → **Amount**.
   - Formula: Laptop_Booking__r.Amount__c.
5. Click **Check Syntax** → ensure no errors.



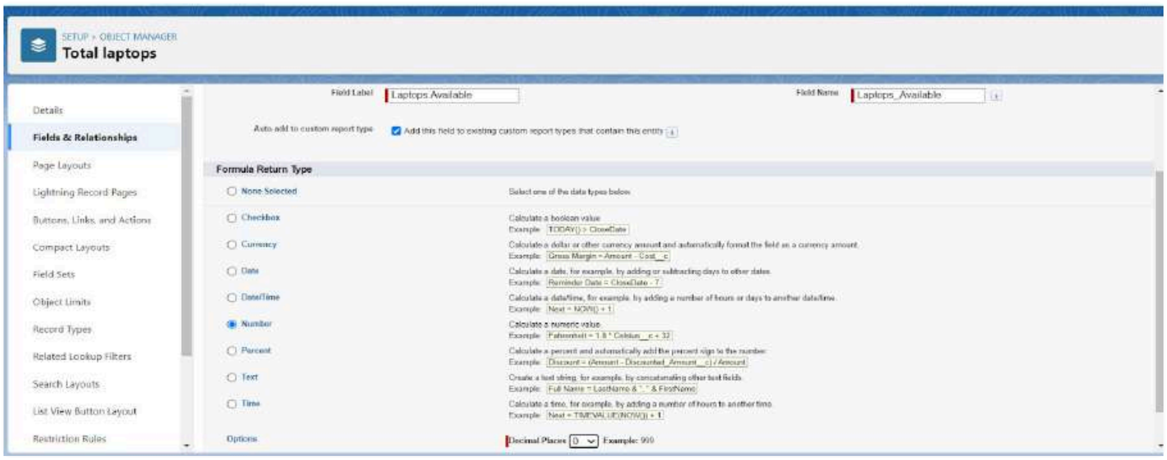
Click on Next >> Next >> Save and new.



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”



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

Object:

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

3. 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

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.

Save the validation rule.

Profiles:

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. Profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges. You can define profiles by the user's job function. For example System Administrator, Developer, Sales Representative.

Types of profiles in salesforce

Standard profiles: By default salesforce provides below standard profiles.

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

We cannot deleted standard ones

Each of these standard ones includes a default set of permissions for all of the standard objects available on the platform.

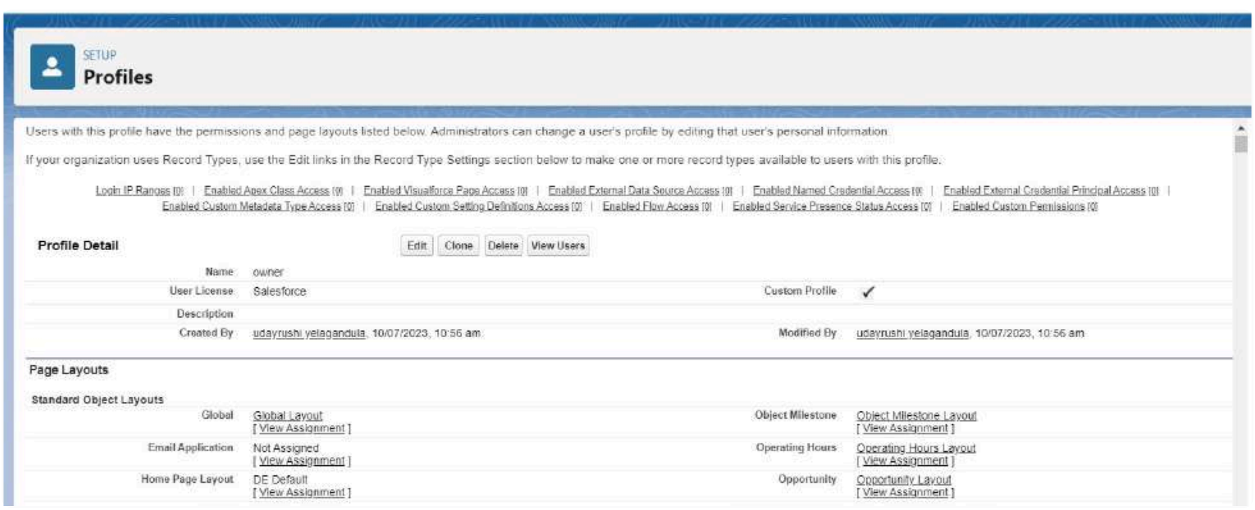
Custom Profiles:

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

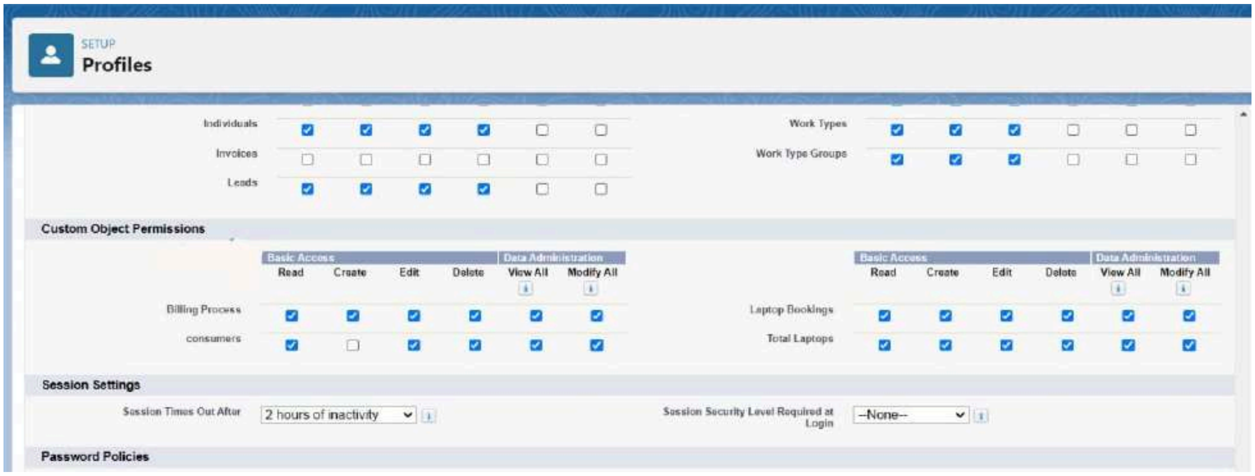
Owner Profile

To create a new profile:

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



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.



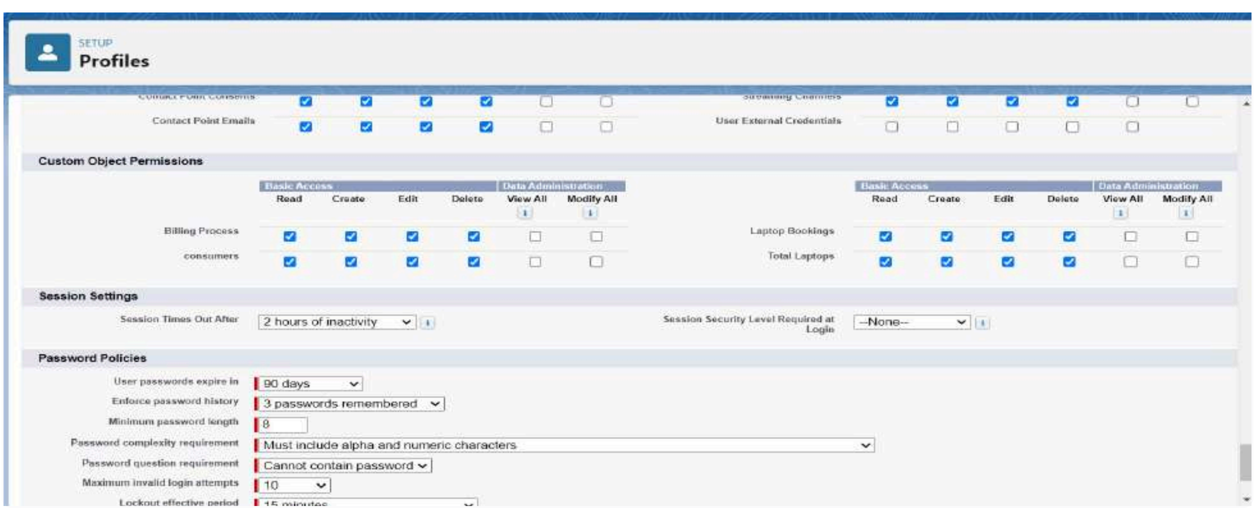
3.Give Access and Save it.

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.



Give access and save it.

Roles and Hierarchy:

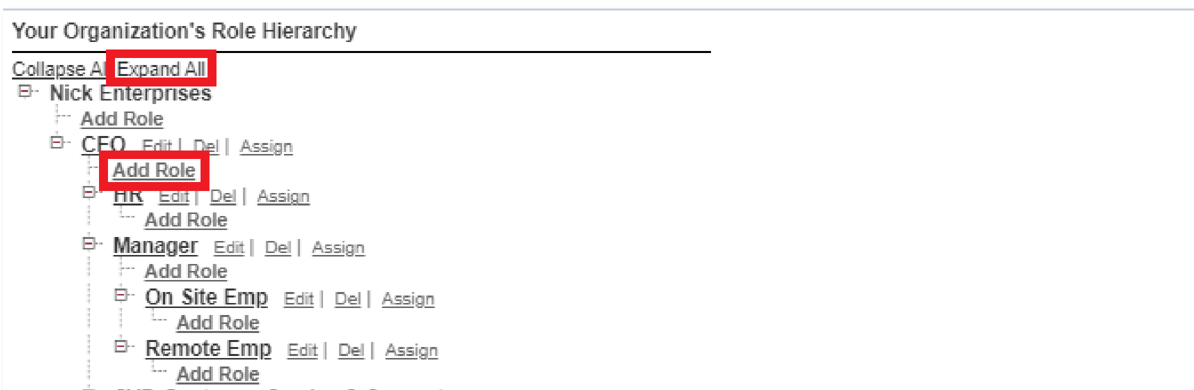
A role in Salesforce defines a user's visibility access at the record level. Roles may be used to specify the types of access that people in your Salesforce organization can have to data. Simply put, it describes what a user could see within the Salesforce organization.

Creating owner Role

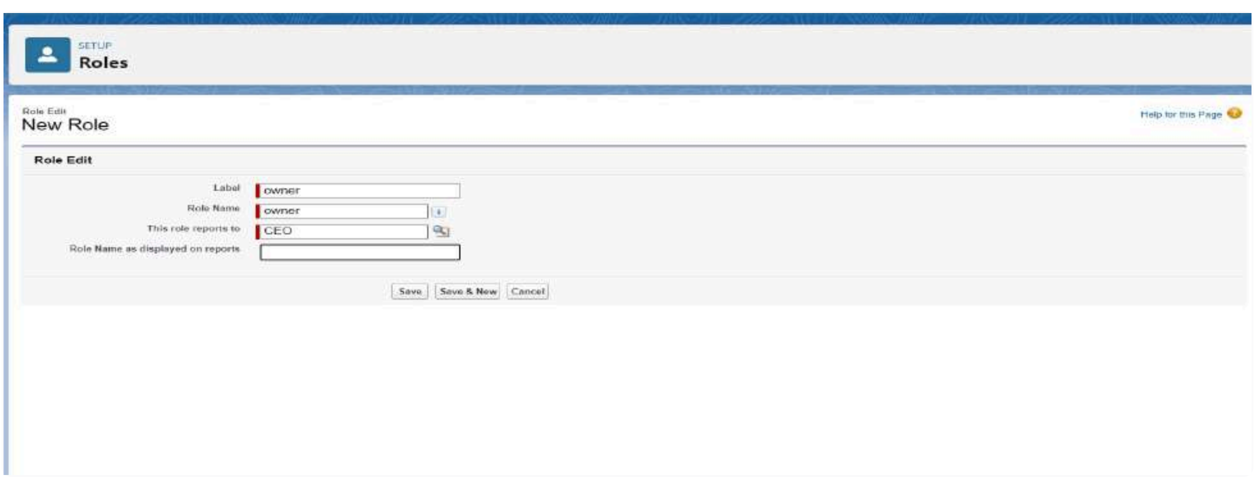
Creating owner Role:

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.



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

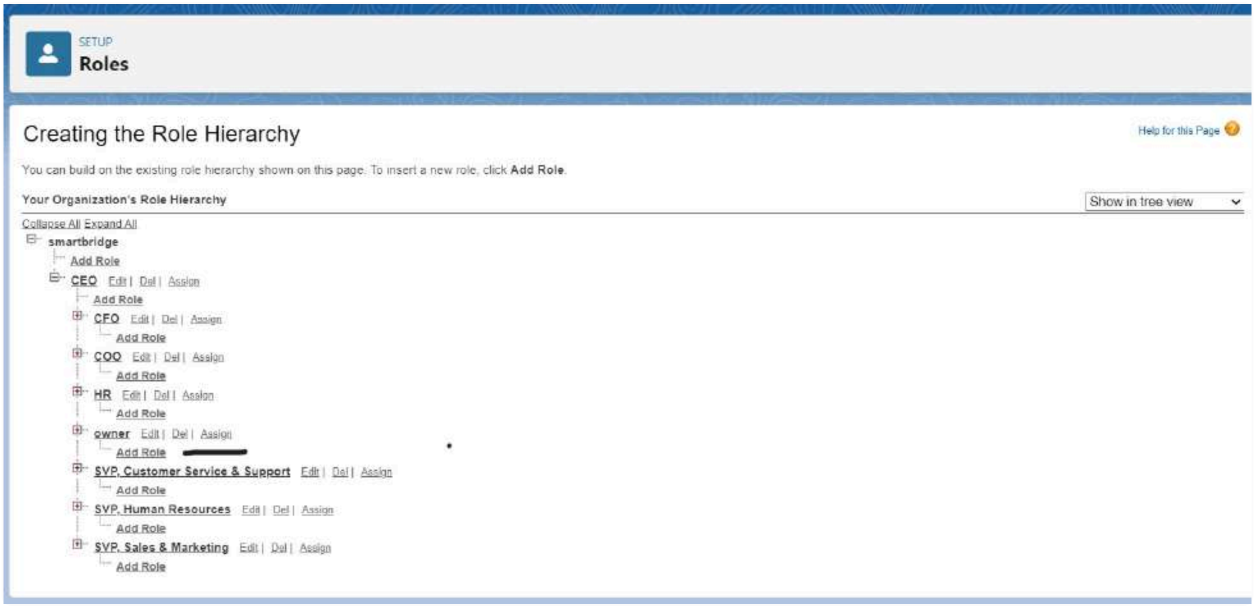


Click and save it.

Creating Agent roles

Creating another two roles under Owner

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



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

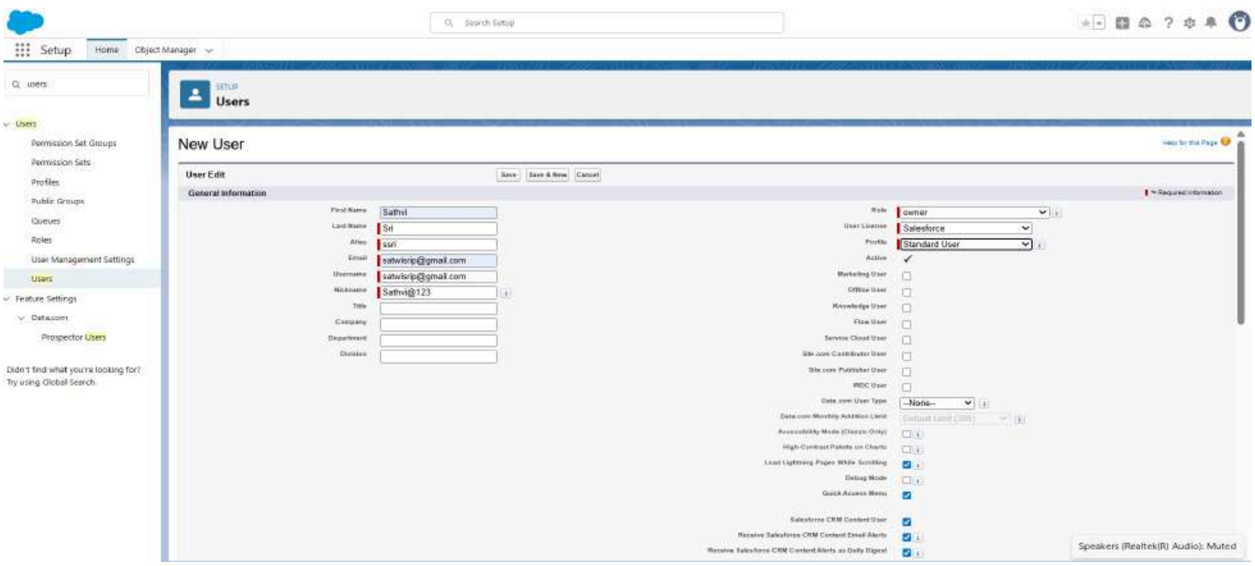
Users

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

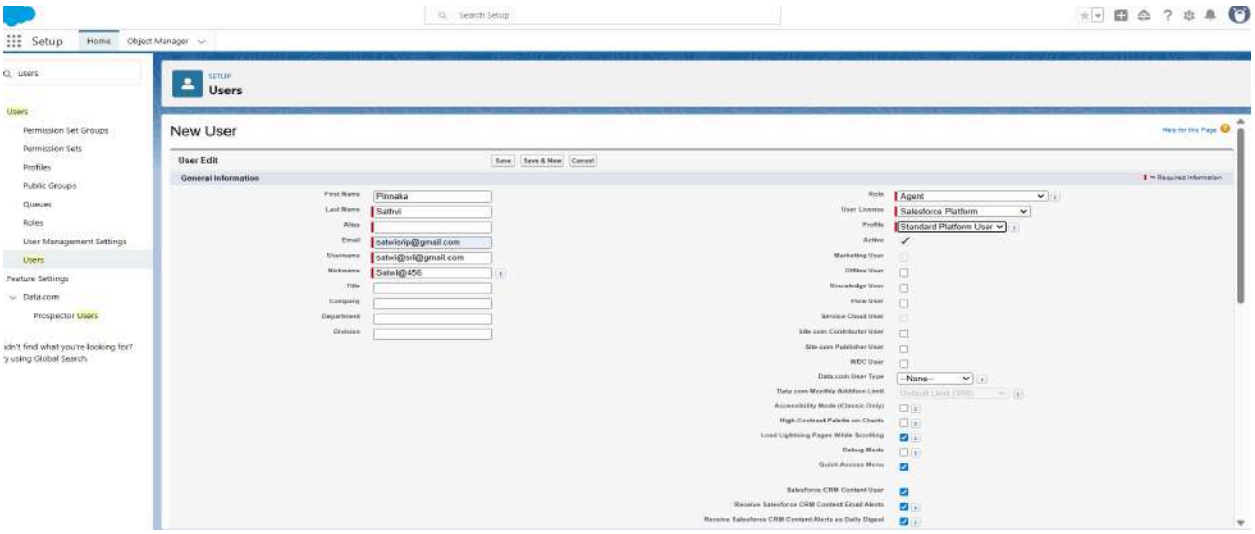
1. Go to setup - type users in quick find box - select users -click New user.
2. Fill in the fields
3. First Name : Sathvi

4. Last Name : Sri
5. Alias : ssri
6. Email id : satwisrip@gmail.com
7. Username : satwi@gmail.com
8. Nick Name : Satwi@123
9. Role : owner
10. User license:Salesforce and Profiles : owner.



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 : Agent.



12. Save it

Flows:

Salesforce Flow is a no-code automation tool that lets you streamline business processes, collect/update data, and guide users through steps with a visual drag-and-drop interface.

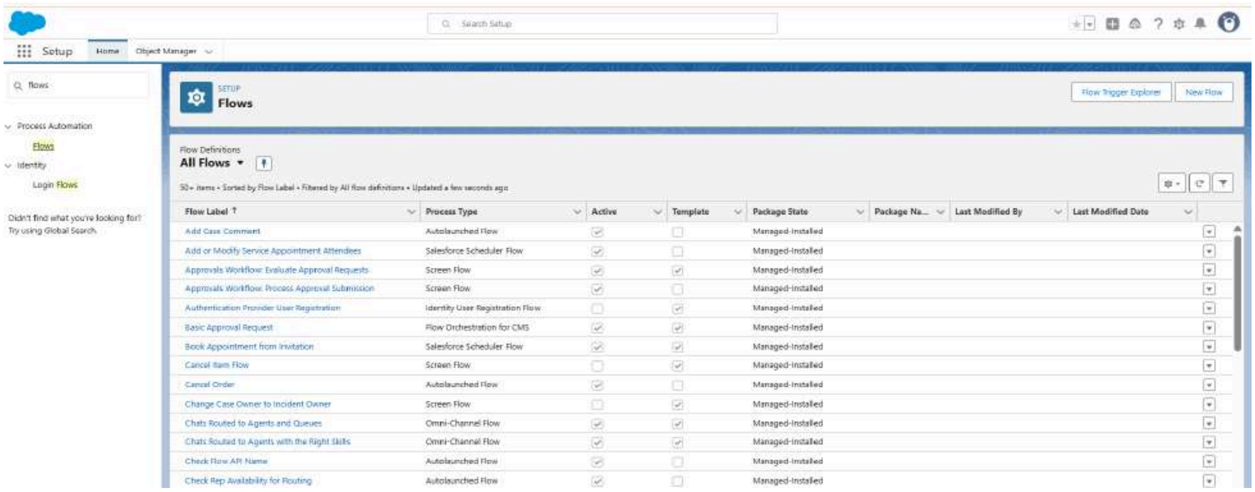
Types of Flows

- **Screen Flows** – Guide users with screens for data entry or display.
- **Autolaunched Flows** – Run automatically in the background (e.g., on record create/update).
- **Scheduled Flows** – Run at specific times or intervals.
- **Record-Triggered Flows** – Triggered when records meet conditions.
- **Subflows** – Reusable flows inside other flows.
- **Flow Templates** – Pre-built templates for common use cases.

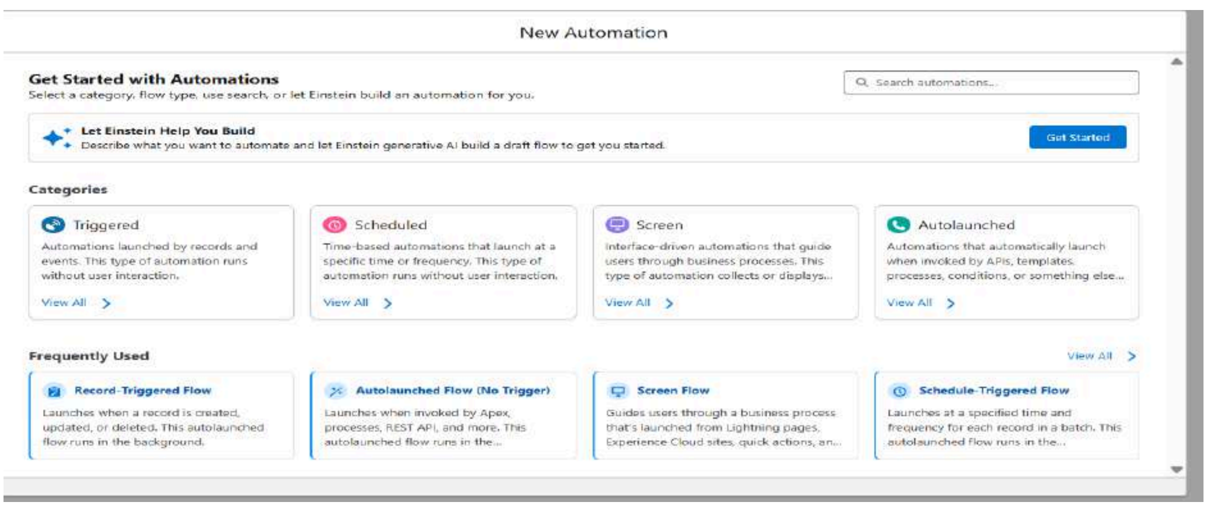
Why create a flow?
To automatically populate the **Amount field** based on the **selected laptop type**, ensuring values are filled without manual input.

Create a Flow on dell laptop:

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



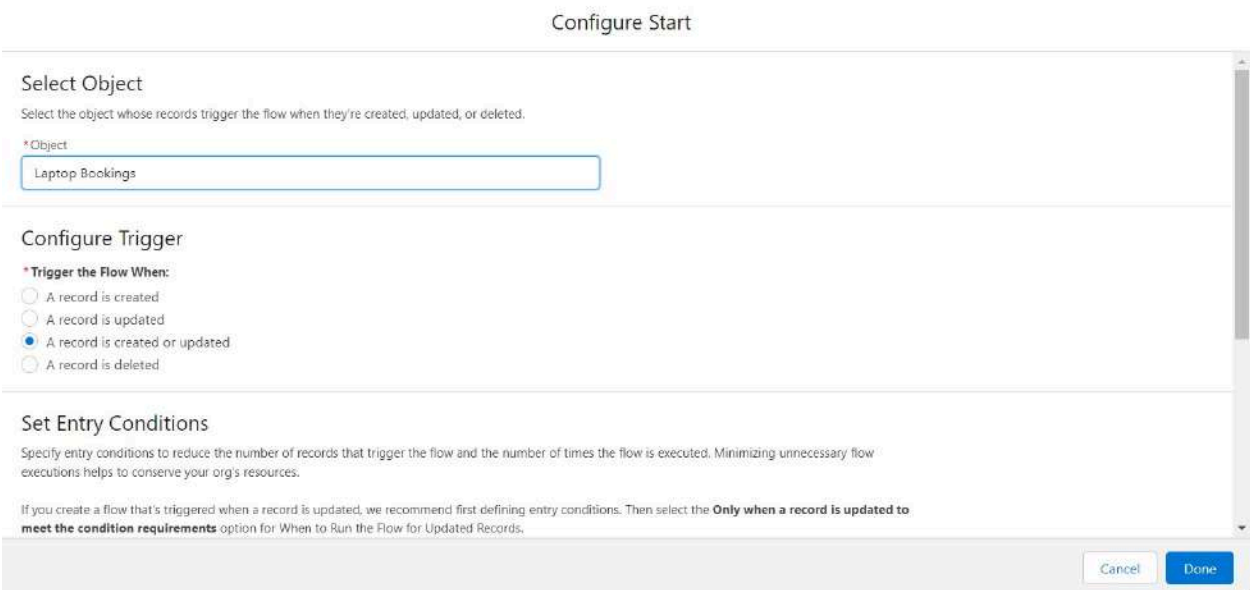
Select the Record-triggered flow and Click on Create.

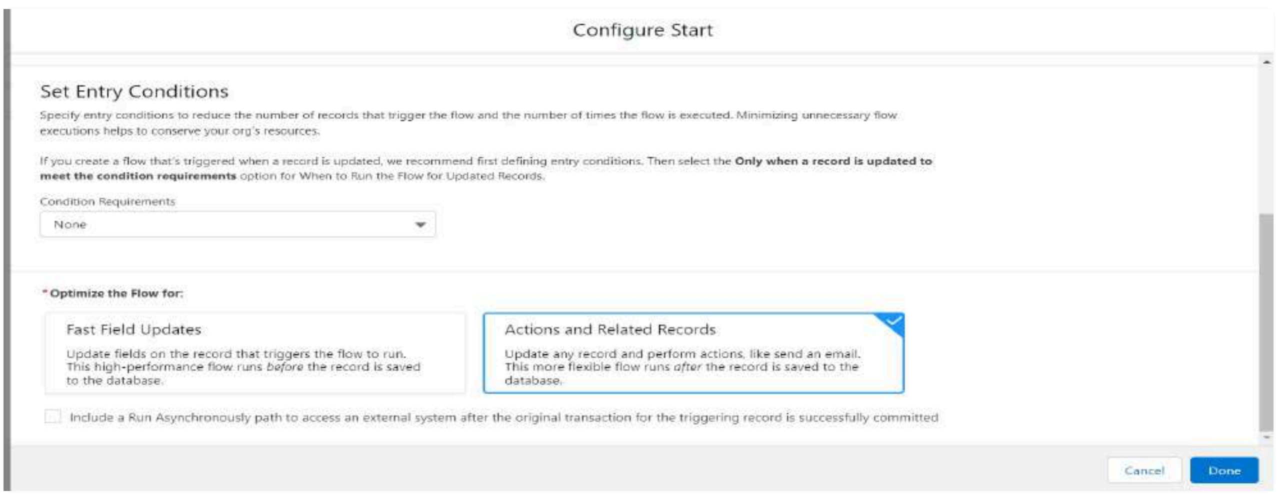


Select the Object as a Laptop Booking in the Drop down list.

Select the Trigger Flow when: “A record is Created or Updated”.

Select the Optimize the flow for: “Actions and Related Records” and Click on Done.

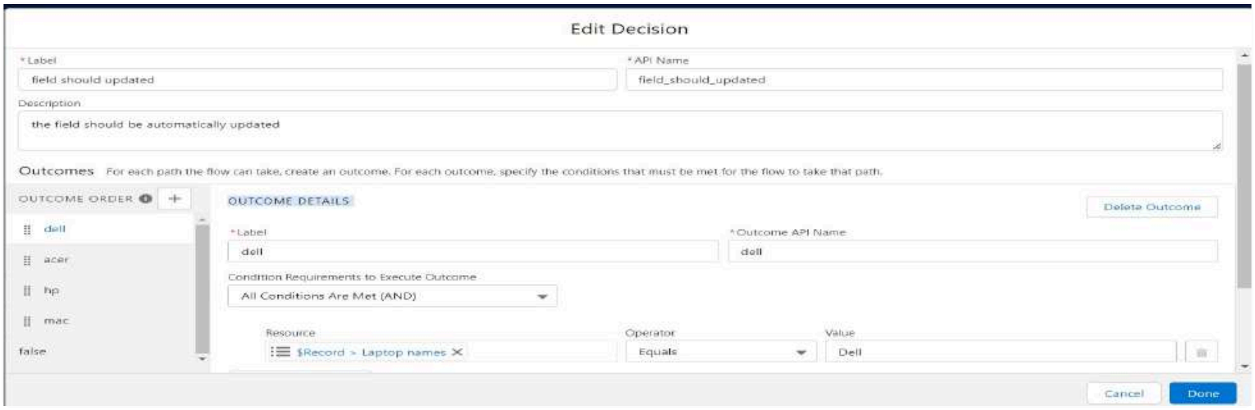




6. Under the Record-triggered Flow Click on “+” Symbol and In the Drop down List select the “Decision Element”.
7. Enter the Details Label: Field should be Update, API name: Gets Automatically Generated.
8. Enter the Outcome Details Label: dell , Outcome API name: Gets Automatically Generated.

- Resource: Select $Record.Laptop_name__c.
- Operator: Select Equals.
- Value: Select dell
- Add the same outcome order to acer , hp, mac.

- Rename Default outcome as False
- Click done.



9. Go to flow page
11. Beside dell there is a symbol '+' click on that.
12. Again select decision
10. Enter the Details Label: Field should Update(any one u want), API name: Gets Automatically Generated.
11. select the Outcome Details Label: dell core i3 , Outcome API name: Gets Automatically Generated.

- Resource: Select {!$Record.core_type__c}.
- Operator: Select Equals.
- Value: Select core i3.
- Then again click the symbol '+' outcome details

12. 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.Click done.

ca18. So go to the flow page select ‘+’ after core i3 then again select the decision.

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

20. Enter the Outcome Details Label: dell 1(i3) ,Outcome API name: Gets auto Generated.

Resource: Select Record.how many months.

Operator: Select Equals and value 1

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..

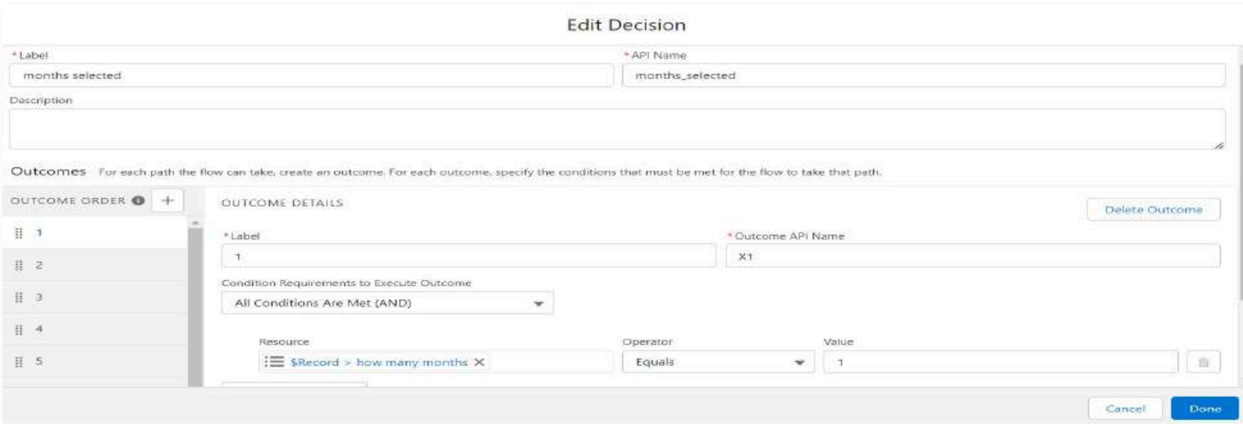
26. Click ‘+’ outcome details
27. Enter the Outcome Details Label: dell 4(i3) , Outcome API name: Gets Automatically Generated.

- 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 5.



30. Follow the above picture you will understand.

40. After dell 1(i3) there is '+' symbol like dell 2(i3),dell 3(i3),dell 4(i3),dell 5(i3).

- Click **'+'** → **Update Records** for each outcome.
- Enter **Details Label** (e.g., *one month of Dell i3 rate*). API name is auto-generated.
- Update **Field: Amount__c** with values:
    - Dell 1 (i3) = 1000
    - Dell 2 (i3) = 2000
    - Dell 3 (i3) = 3000
    - Dell 4 (i3) = 4000
    - Dell 5 (i3) = 5000
- Repeat for other months.
- Enter **Details Label: months selected** (API auto).
- Add outcomes:
    - **Dell 1 (i7)** → Operator = Equals, Value = 1.
    - **Dell 2 (i7)** → API auto, set Resource = Record.

Resource: Select Record.how many months.

- Operator: Select Equals.
- Value: Select 2..

41. Click '+' outcome details
42. Enter the Outcome Details Label: dell 3(i7) , Outcome API name: Gets Automatically Generated.

- Resource: Select Record.how many months.

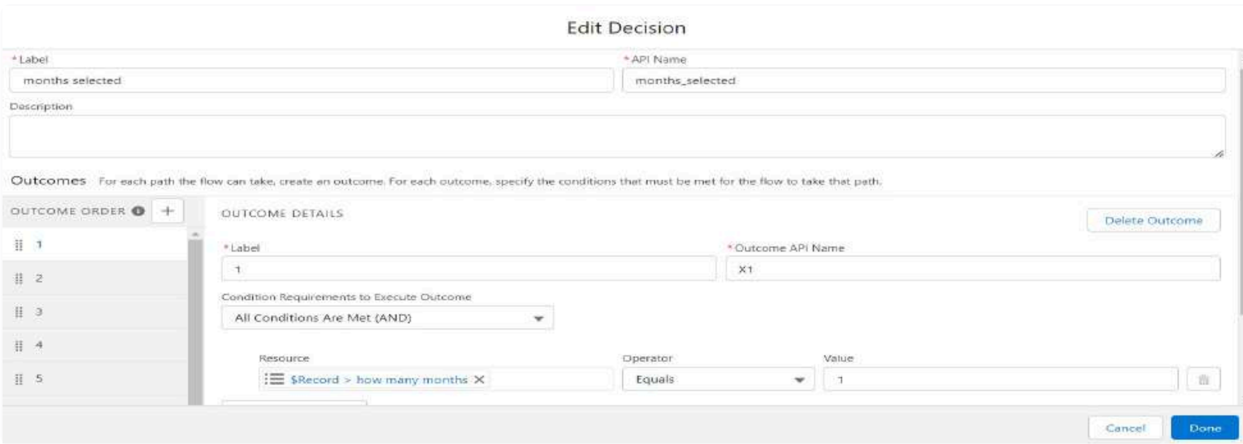
- Operator: Select Equals.
- Value: Select 3..

43. Click ‘+’ outcome details
44. Enter the Outcome Details Label: dell 4(i7) , Outcome API name: Gets Automatically Generated.

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

45. Click ‘+’ outcome details
46. Enter the Outcome Details Label: dell 5(i7) , Outcome API name: Gets Automatically Generated.

- Resource: Select Record.how many months.
- Operator: Select Equals.
- Value: Select 5.



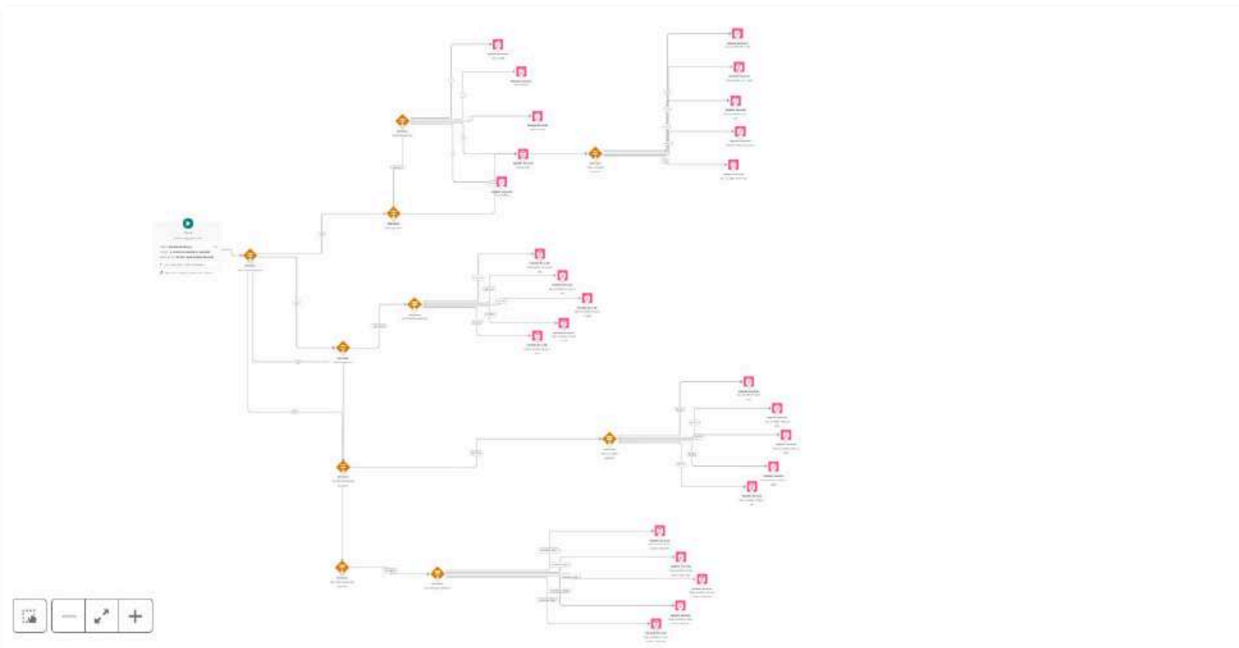
47. Follow the above picture you will understand.
48. After dell 1(i7) there is ‘+’ symbol like dell 2(i7),dell 3(i7),dell 4(i7),dell 5(i7).
49. Click on ‘+’ then select update records
50. Enter the Details Label: one month of dell i5 rate , API name: Gets Automatically Generated.
51. Field:- Amount__c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

53. **Follow the steps from 37 to 53 for Dell i5 and update the Amount for each month (1,2,3,4,5) as 1500, 2500,3500,4500,5500 respectively.**

FOLLOW THE SAME STEPS OF DELL FOR HP, Acer,Mac to create flows for them and also give different values for all of them

After completion of creating all flows for dell, hp, acer and mac it looks as follows:

FLOW:



Click on save .

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

Save the flow and activate it.

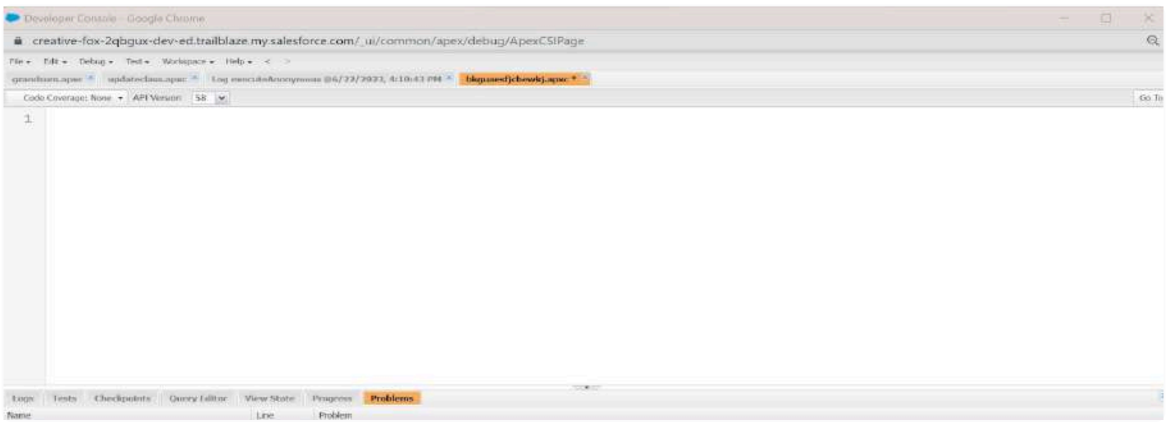
APEX:

Apex is a strongly typed, object-oriented language on the Salesforce Lightning platform. It has Java-like syntax, supports OOP concepts (classes, objects, methods), and lets developers add business logic to events like button clicks, record updates, and Visualforce pages. It can also run through triggers or web service requests.

In Apex, a **class** is a blueprint to create objects, and an **object** is an instance that uses the class's variables and methods.

Steps to create a class in Apex:

1. Log in to **Trailhead**.
2. Click the **gear icon** (top right).
3. Open **Developer Console**.
4. In the console, create your new class.



Then you can see many tools in the Toolbar of the new console window. Click on File, Newand Apex Class.

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.

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

Apex access modifiers:

- **Private**: Default. Accessible only within the same class.
- **Protected**: Accessible within the class, its inner classes, and subclasses.
- **Public**: Accessible by all Apex in the same package/namespace.
- **Global**: Accessible by any Apex code, even outside the app (e.g., via API).

```
public class Student {

}
```

Triggers: **trigger** is a block of Apex code that runs automatically **before or after DML events** (like insert, update, or delete). Triggers help automate tasks not possible through the Salesforce UI by executing custom scripts.**Types of Triggers**

1. **Before Triggers** – Run before records are saved (useful for validation).
2. **After Triggers** – Run after records are saved (useful for updating related records).

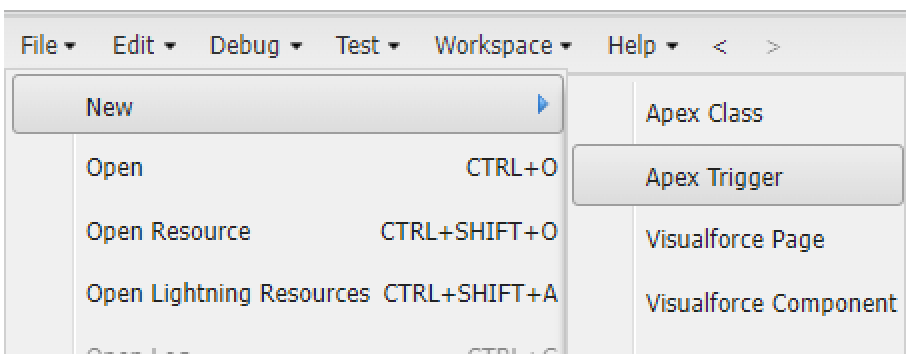
Apex Trigger and Handler Class:

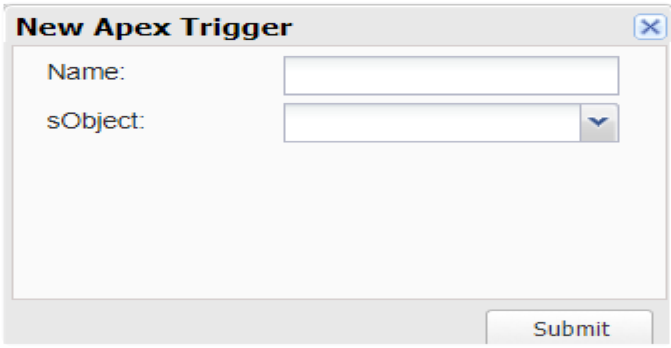
How to create a new trigger:

1. Log in to Trailhead and click the gear icon in the top-right corner.

2. Open the **Developer Console**.

3. In the console, go to the **File** menu → **New** → **Trigger** >> Enter the trigger name and select the object to associate it wit





Syntax For creating trigger :

The syntax for creating trigger is :

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

}

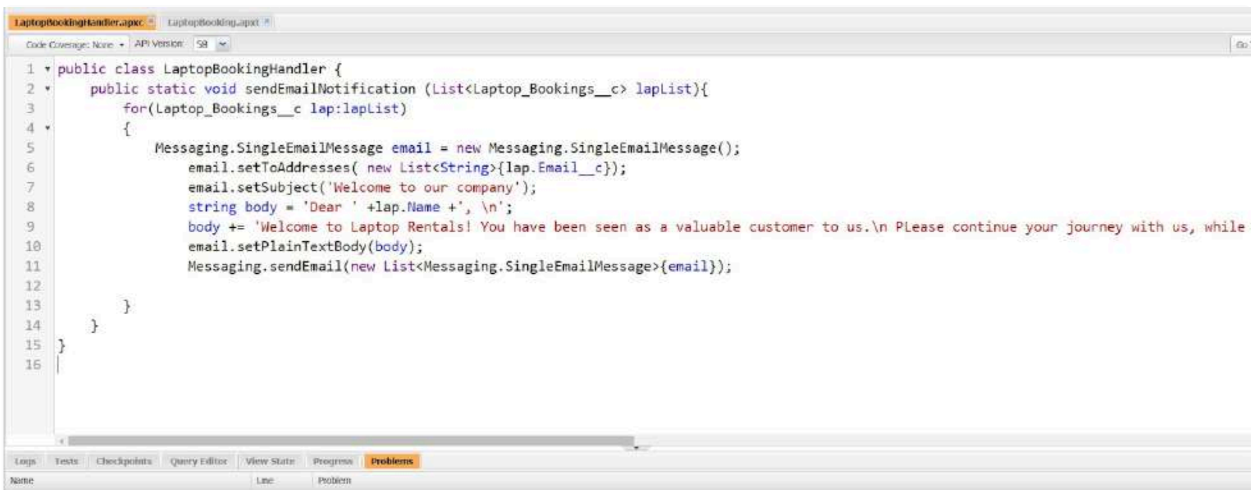
Trigger Code:

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

    if (Trigger.isAfter && (Trigger.isInsert || Trigger.isUpdate)) {

        LaptopBookingHandler.sendEmailNotification(Trigger.new);
```

}}Here’s how you can set up your trigger with the correct API names:

- **Trigger Name**: LaptopBooking
- **Object API Name**: Laptop_Bookings__c (copy the API name directly from your org to avoid errors)

Handler Class:



Code Snippet :

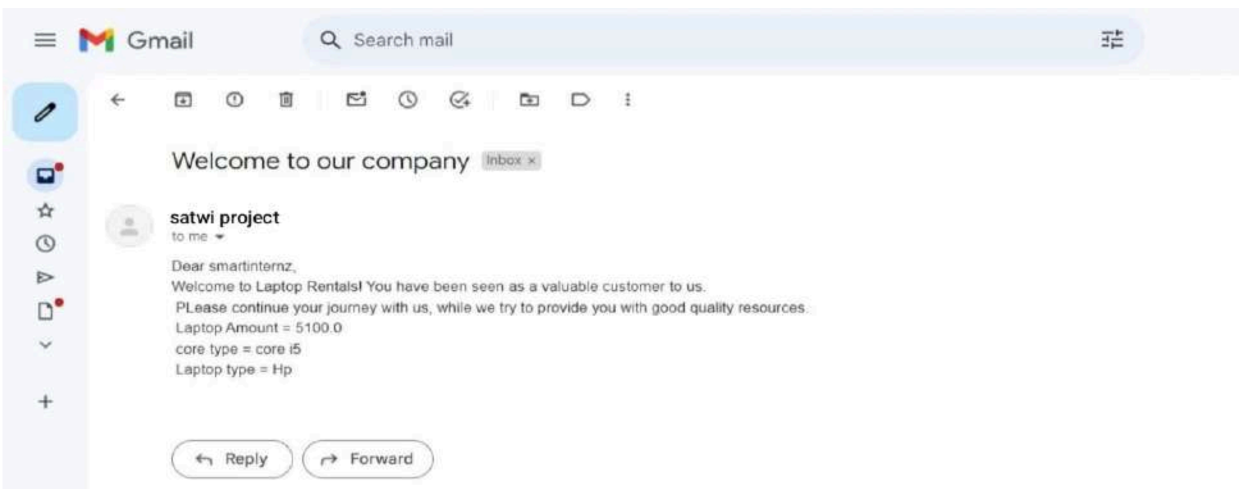
```
public class LaptopBookingHandler {
   public static void sendEmailNotification (List<Laptop_Bookings__c> lapList){
      for(Laptop_Bookings__c lap:lapList)
      {
         Messaging.SingleEmailMessage email = new Messaging.SingleEmailMessage();
            email.setToAddresses( new List<String>{lap.Email__c});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

```
            Messaging.sendEmail(new List<Messaging.SingleEmailMessage>{email});

        }
    }
}
```

Note:

- **Handler Class Name**: LaptopBookingHandler
- **Object API Name**: Laptop_Bookings__c (copy from your org)
- **Field API Names**:
    - core__c (copy from object in your org)
    - Laptop_type__c (copy from object in your org)

Result:



Reports:

Salesforce Reports allow you to view and analyze your data in many ways, display it in easy formats, and share insights with others. Reports can be created quickly, scheduled, and customized with powerful analytics tools.

Types of Reports in Salesforce

1. **Tabular Reports** – Simple list of data without subtotals.
   Example: List of accounts, contacts, or opportunities.
2. **Summary Reports** – Data with groupings and subtotals.
   Example: Opportunities grouped by sales stage and owner.
3. **Matrix Reports** – Data grouped by both rows and columns for comparison.
   Example: Opportunities by month (rows) and by account (columns).

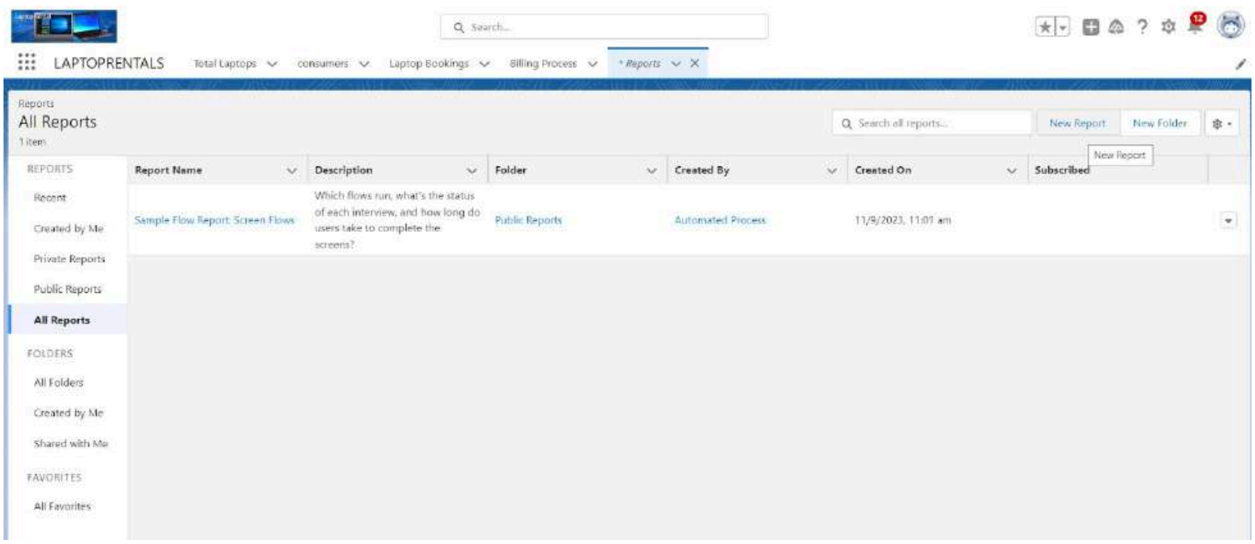
4. **Joined Reports** – Combine multiple report types into blocks for a single view. *Example: Opportunities, cases, and activities for accounts in one report.*

Create Report

1. **Note: Before creating reports just fill the 10-12 records in the Laptop Bookings object.**
2. **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).**

Go to the app ? click on the reports tab

i. Click New Report.

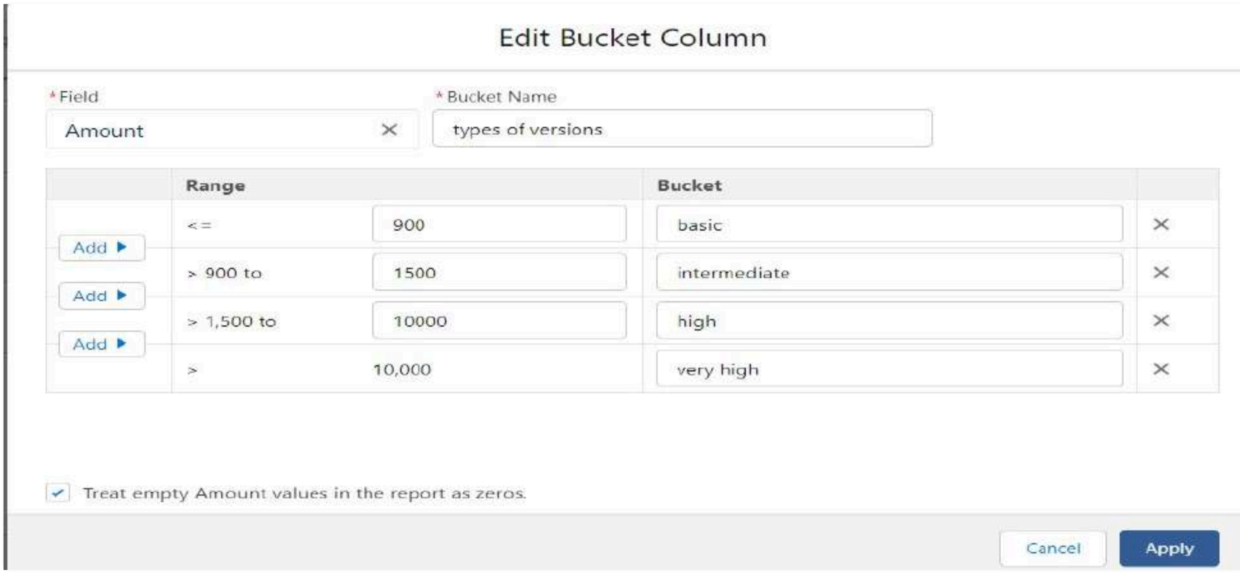


3.Select report type from category or from report type panel or from search panel "consumer with Laptop Bookings and total laptops" ? click on start report.

4.Create a simple tabular report

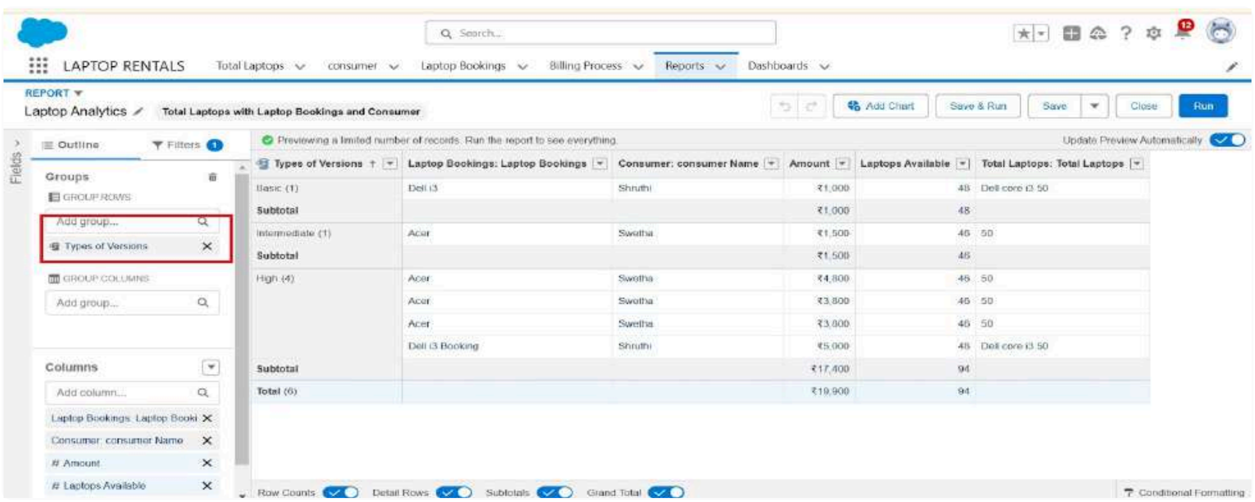
5.Add fields from left pane, make sure that Amount field will be selected.

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

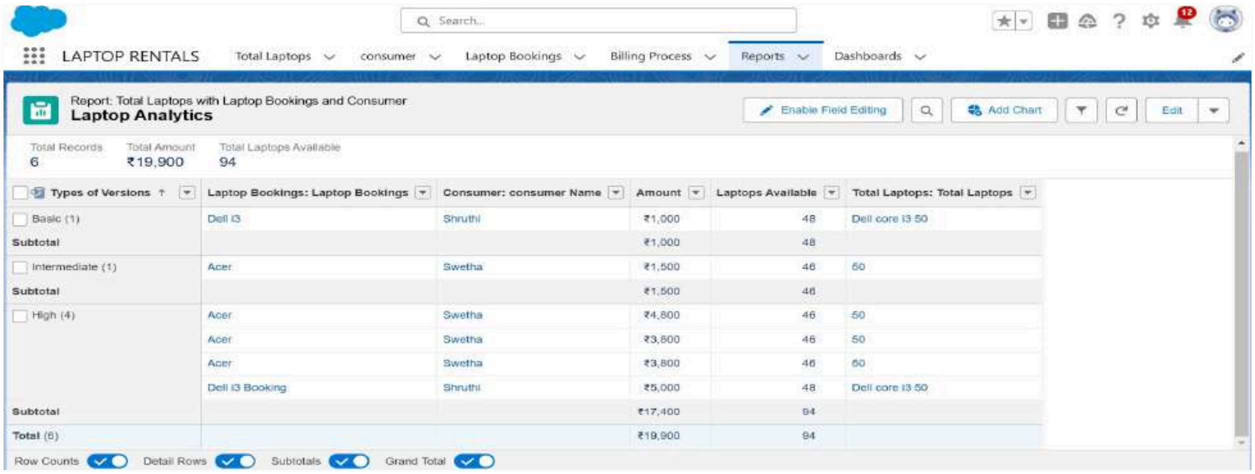


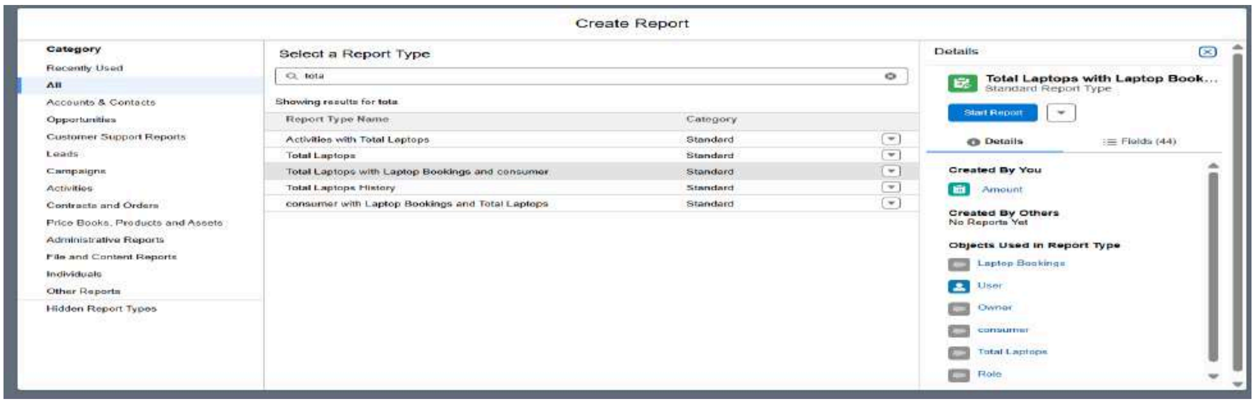
Click apply it.

8. Select Types of version in Group By Rows to create **a summary report**. Follow the image for other fields.



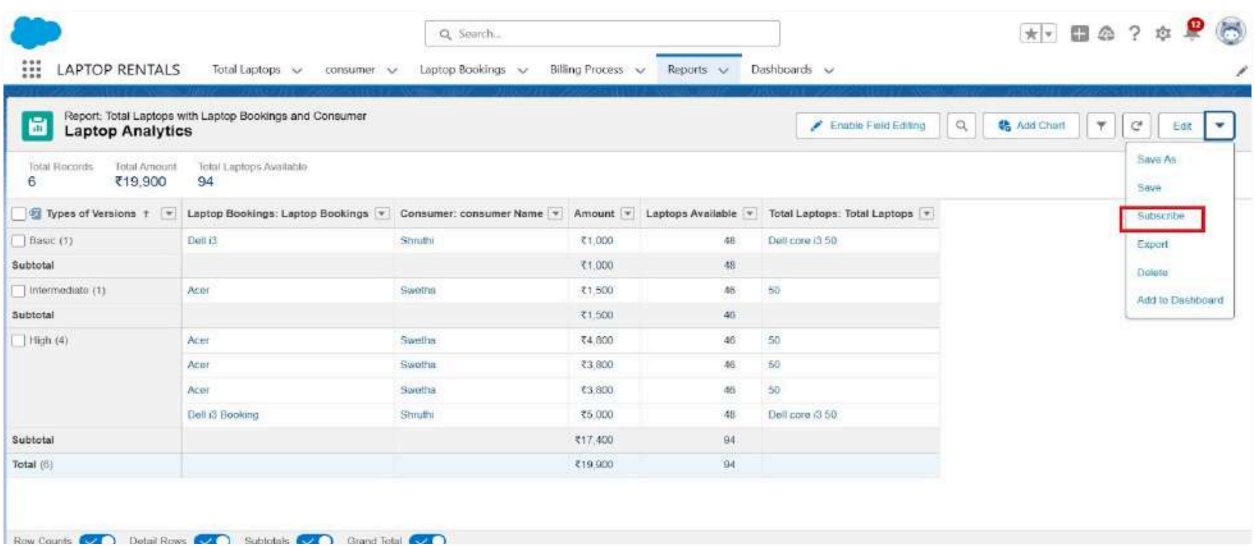
Click on Save & run it.





Sharing report to owner:

Click edit drop down and select subscribe option



Follow as per below image.

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

1. 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. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities. Before building, reading, and sharing dashboards, review these dashboard basics.

Create Dashboard Folder:

Click on the app launcher and search for the dashboard.

Click on the dashboard tab.

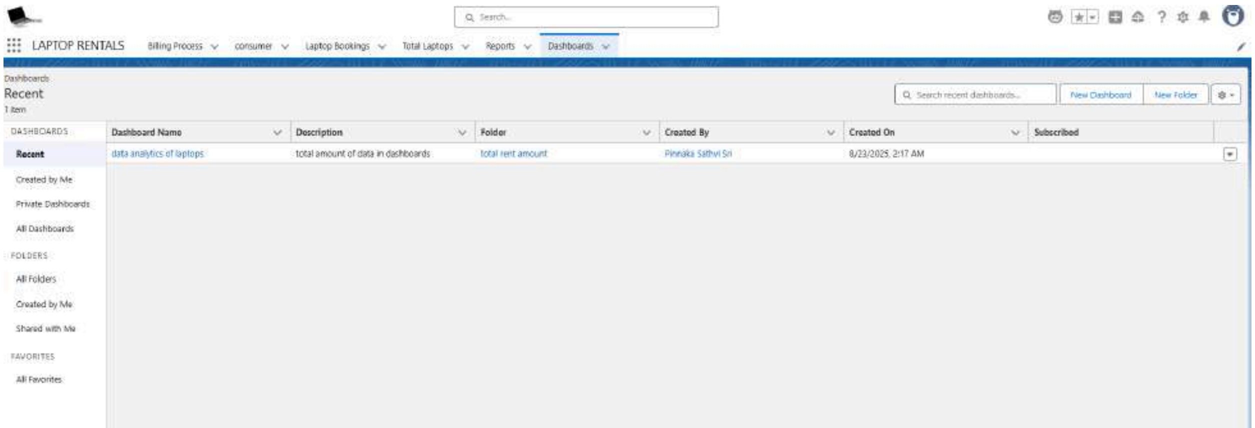
Click the new folder, give the folder label as “total rent amount”.

Folder unique names will be auto populated.

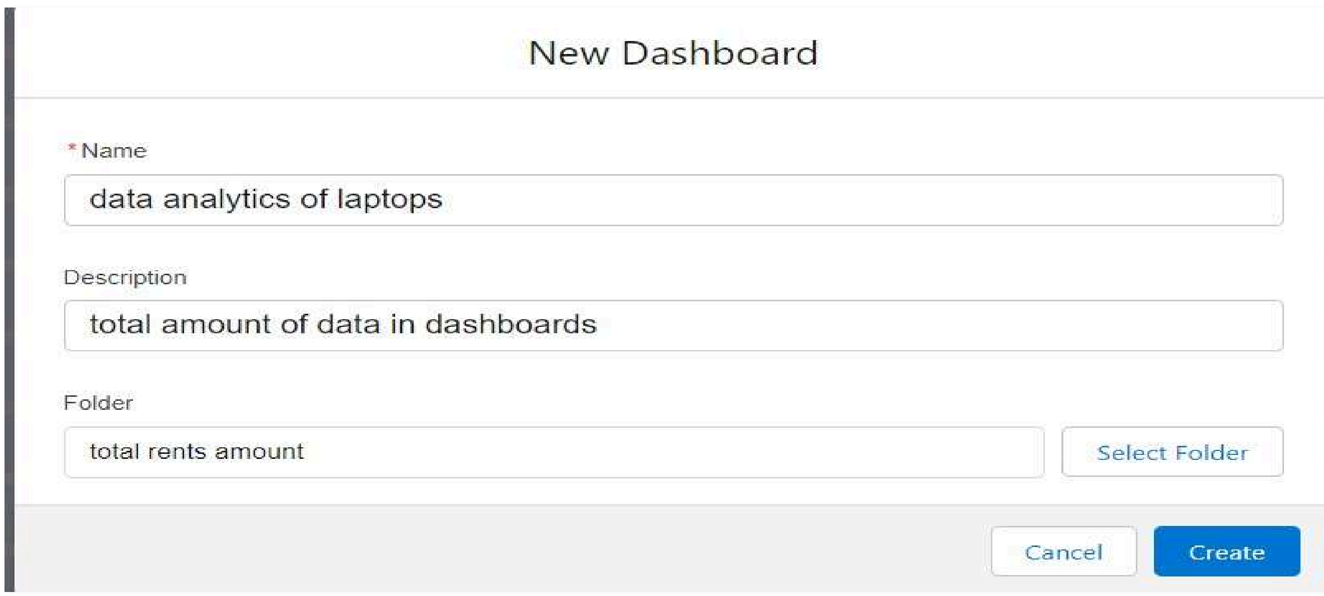
Click save

Create Dashboard:

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

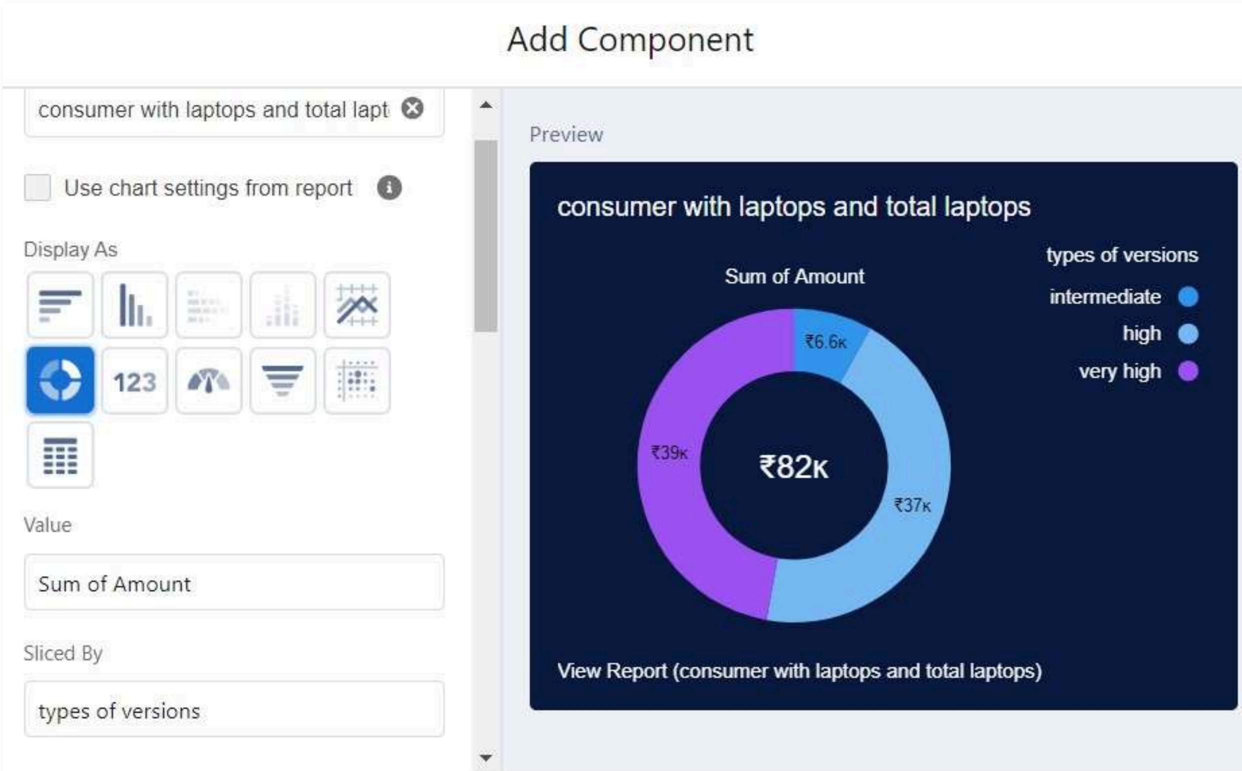


2. Give a Name and select the folder that was created, and click on create.



3. Select add component.

Select a Report and click on select.



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