

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

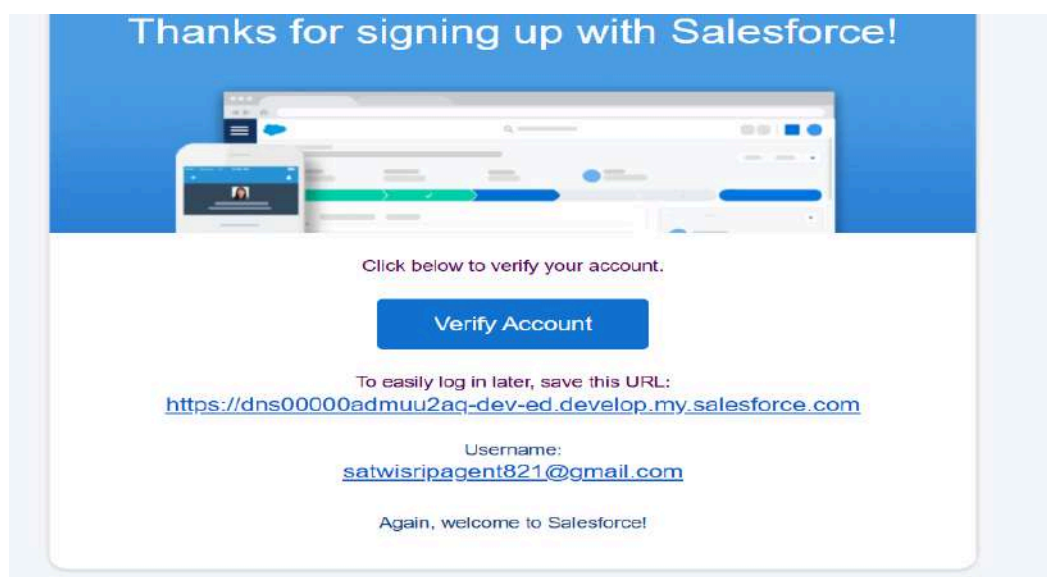
The screenshot shows the Salesforce Developer Edition sign-up page. On the left, a dark blue banner features the Salesforce logo and the text "Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud." Below this, it says "Sign up for your Developer Edition." and lists several benefits: "Build apps fast with drag-and-drop tools", "Go further with Apex code", "Build AI agents with Agentforce", "Harmonize your data with Data Cloud", "Ground Agentforce with structured and unstructured data", and "Integrate with anything using APIs". The right side of the page is a white form titled "Sign up for your Developer Edition" with the subtitle "A free Salesforce Platform environment with Agentforce and Data Cloud." The form includes fields for "First name" (Pinnaka), "Last name" (Sathvi Sri), "Job title" (Developer/Software), "Work email" (Satwisrip@gmail.com), "Company" (Malineni College), and "Country/Region" (India). There is a checkbox for "I agree to the Main Services Agreement - Developer Services and Salesforce Program Agreement" and a "I'm not a robot" CAPTCHA. At the bottom, it says "We value your privacy. To learn more, visit our Privacy Statement."

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

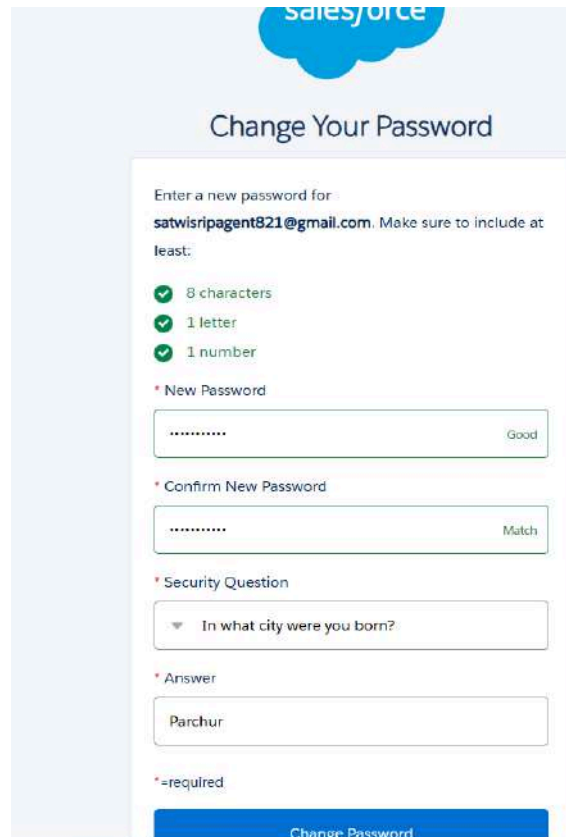
Account Activation

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



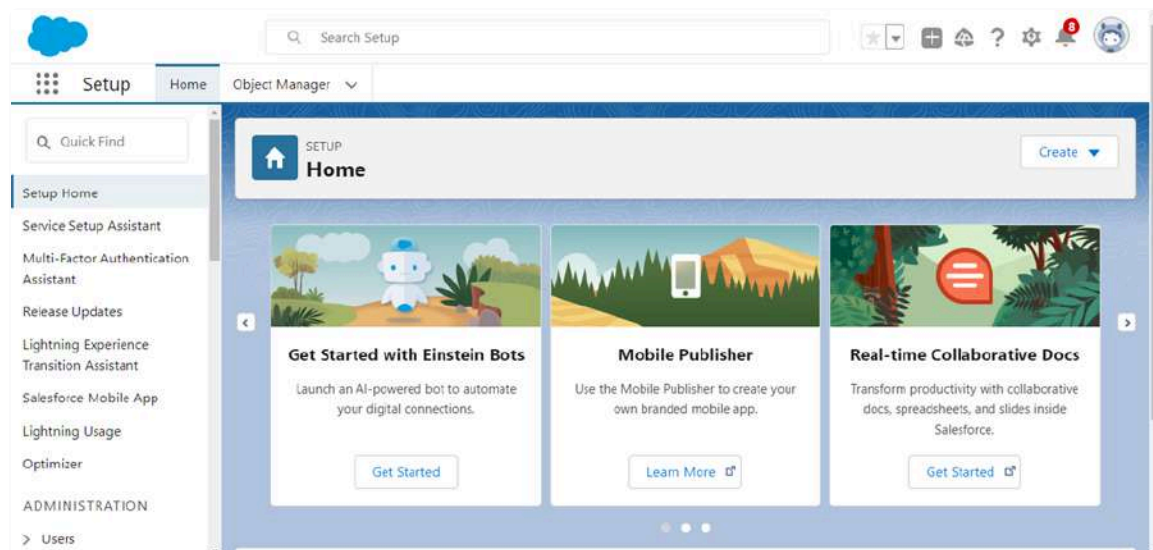
2. Click on Verify Account.

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



The image shows the 'Change Your Password' page in Salesforce. At the top, the Salesforce logo is visible. The title 'Change Your Password' is centered. Below the title, a message says: 'Enter a new password for **satwisripagent821@gmail.com**. Make sure to include at least:'. There are three green checkmarks indicating requirements: '8 characters', '1 letter', and '1 number'. Below these are three input fields: 'New Password' (with a 'Good' status), 'Confirm New Password' (with a 'Match' status), and 'Security Question' (with a dropdown menu showing 'In what city were you born?'). Below the security question is an 'Answer' field containing 'Parchur'. At the bottom, there is a blue button labeled '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 the salesforce.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.

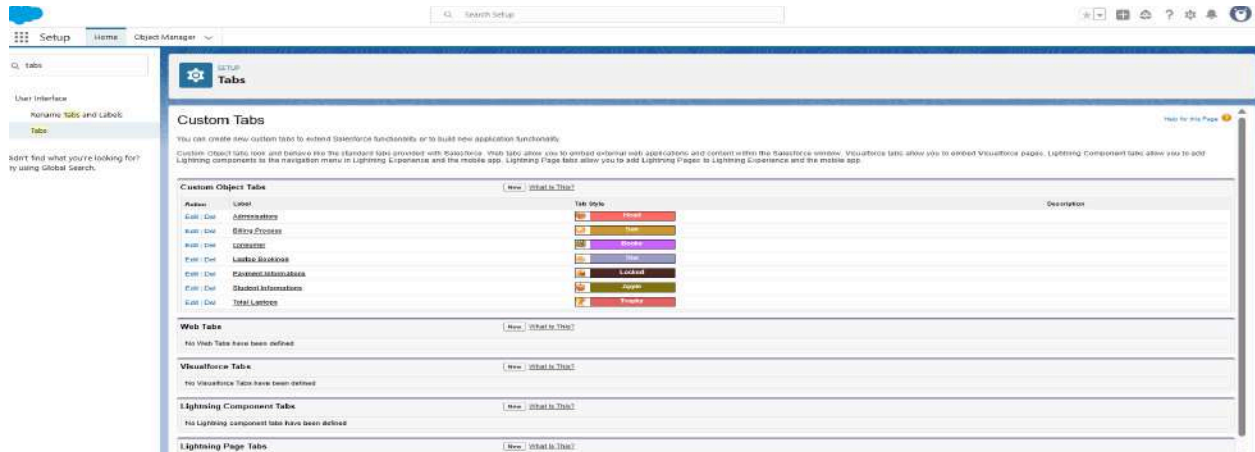
4. Lightning Component Tabs: Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app.

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.




Step 3. Add to Custom Apps Step 3 of 3

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

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

Analytics Studio (standard__Insights)	<input type="checkbox"/>
Sales Console (standard__LightningSalesConsole)	<input type="checkbox"/>
Service Console (standard__LightningService)	<input type="checkbox"/>
Sales (standard__LightningSales)	<input type="checkbox"/>
Lightning Usage App (standard__LightningInstrumentation)	<input type="checkbox"/>
Digital Experiences (standard__SalesforceCMS)	<input type="checkbox"/>
Queue Management (standard__QueueManagement)	<input type="checkbox"/>
Bot Solutions (standard__LightningBot)	<input type="checkbox"/>
Data Manager (standard__DataManager)	<input type="checkbox"/>
Salesforce Scheduler Setup (standard__LightningScheduler)	<input type="checkbox"/>

☒ Append tab to users' existing personal customizations

 Previous Save Cancel

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:

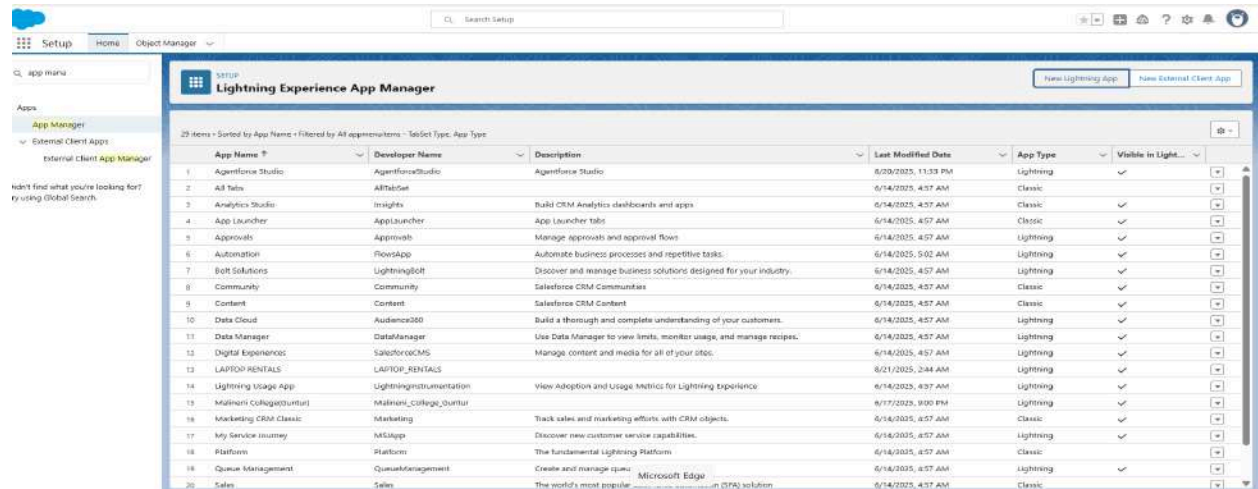
An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

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.

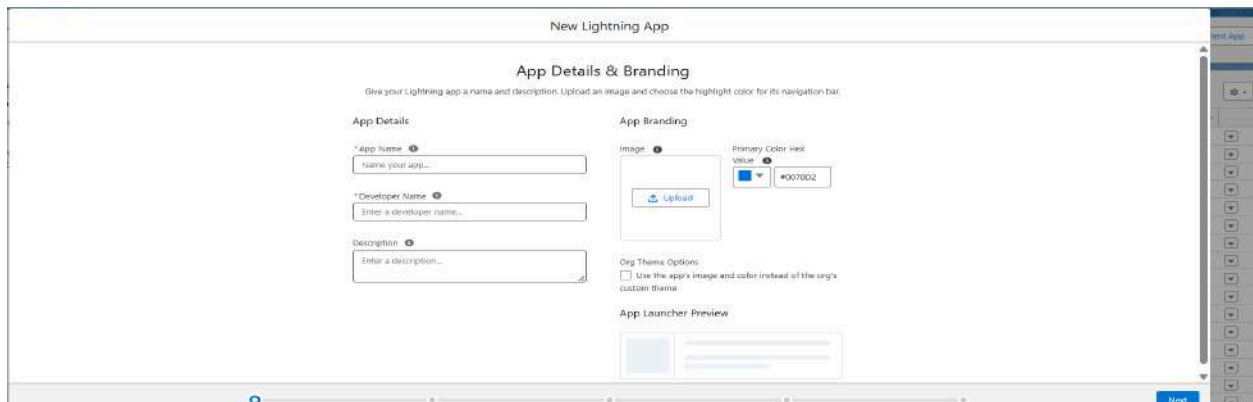
Create a Lightning App

To create a lightning app page:

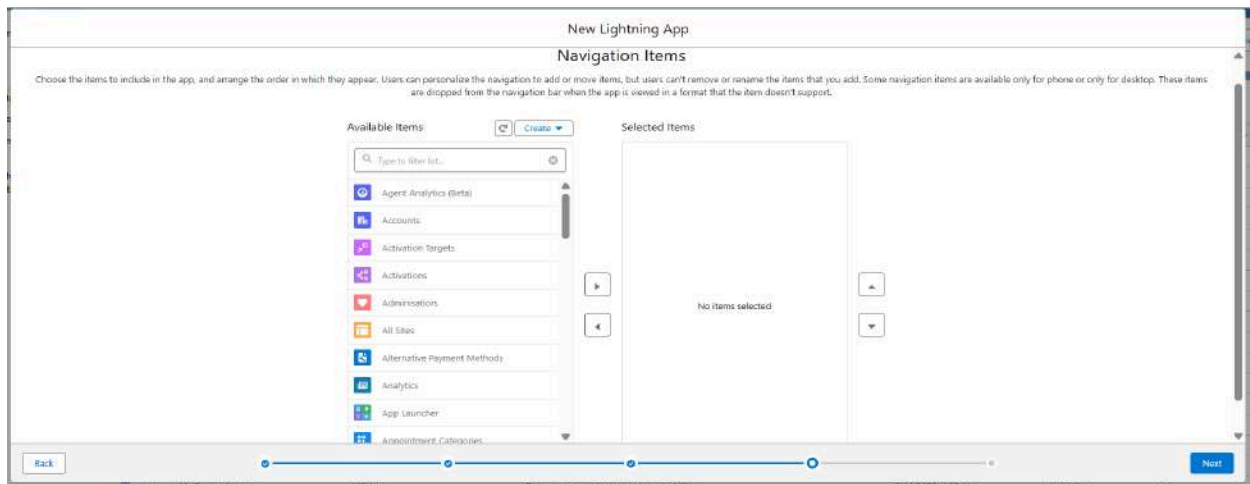
1. Go to setup page >> search “app manager” in quick find >> select “app manager” >> click on New lightning App.



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.

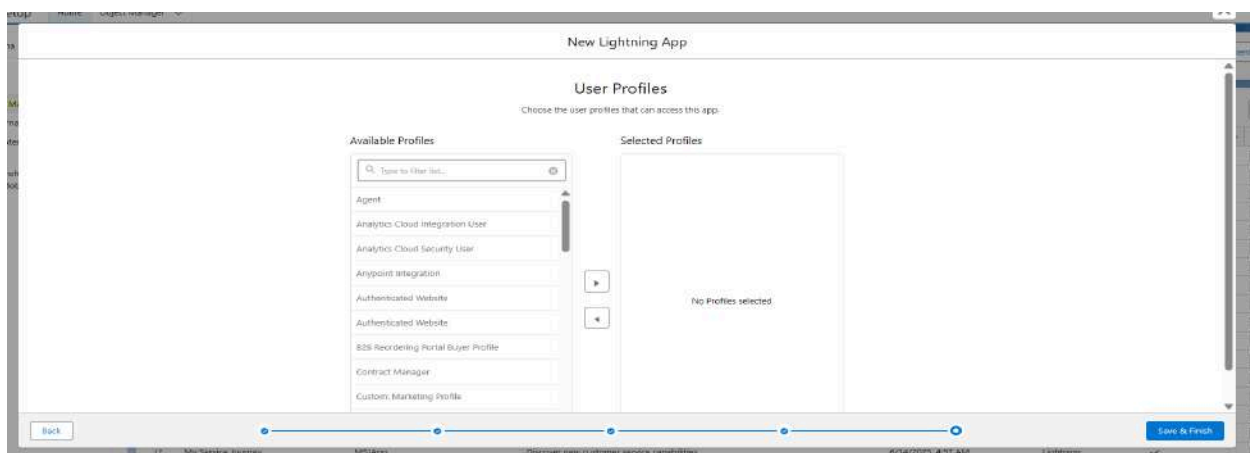


*Upload a photo that is related to your app>>To Add Navigation Items:



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.

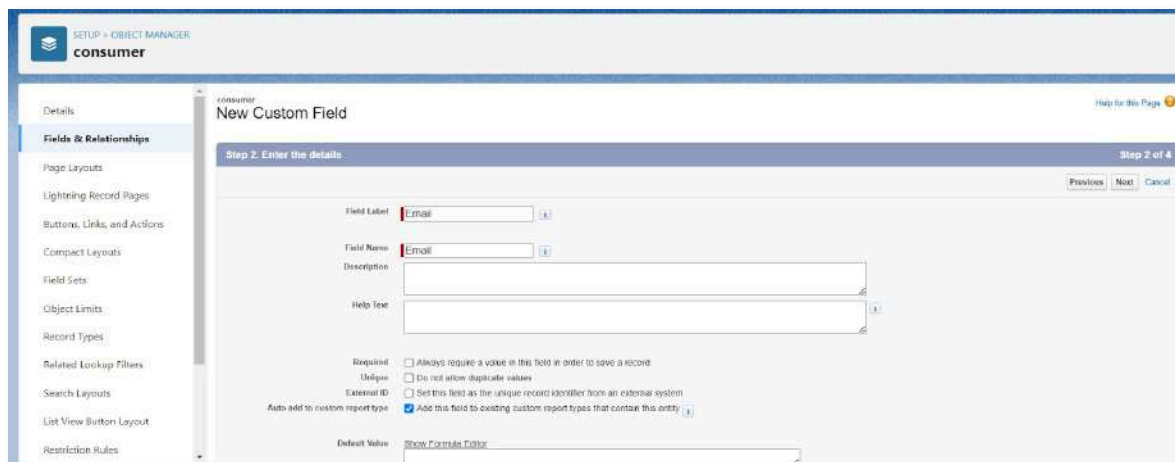
The screenshot shows the Salesforce Setup interface for creating a new field for the 'consumer' object. The left sidebar shows the navigation menu with 'Fields & Relationships' selected. The main area is titled 'Step 2: Enter the details' and shows the following fields:

- Field Label: phone number
- Field Name: phone_number
- Description: (empty)
- Help Text: (empty)
- Required: ☒ Always require a value in this field in order to save a record
- Auto add to custom report type: ☒ Add this field to existing custom report types that contain this entity
- Default Value: Show Formula Editor

At the bottom, there is a small text box with the formula editor instructions: 'Use formula syntax: Enclose text and picklist value API names in double quotes. ({!Ref, Ref}), include numbers without quotes. (!7), when picklists are abbreviations (!T), and express date calculations in the standard format: {!Today} + 7. To reference a field from a Custom Relationship type record use: <CustomRelationshipType__c>.<RecordOfFutureField__c>.'

2. To create another fields in an object:

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



The screenshot shows the Salesforce 'New Custom Field' setup page for the 'consumer' object. The page is titled 'Step 2. Enter the details' and shows the configuration for a new field. The 'Field Label' is set to 'Email' and the 'Field Name' is also 'Email'. The 'Data Type' is 'Email'. The 'Required' checkbox is checked. The 'Auto add to custom report type' checkbox is also checked. The 'Default Value' is set to 'Show Formula Editor'.

3. To create another fields in an object:

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

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

SETUP > OBJECT MANAGER
Laptop Bookings

Details

Fields & Relationships

Page Layouts:
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules

Field Label: Laptop names

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

Dell
Acer
Hp
Mac

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

Field Name: Laptop_type

Description:

Help Text:

Previous Next Cancel

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

Field Label: core type

Values:

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

core i3
core i5
core i7
Bionic chip

☐ Display values alphabetically, not in the order entered

☐ Use first value as default value

☒ Restrict picklist to the values defined in the value set

Field Name: core

Description:

Help Text:

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

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

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.

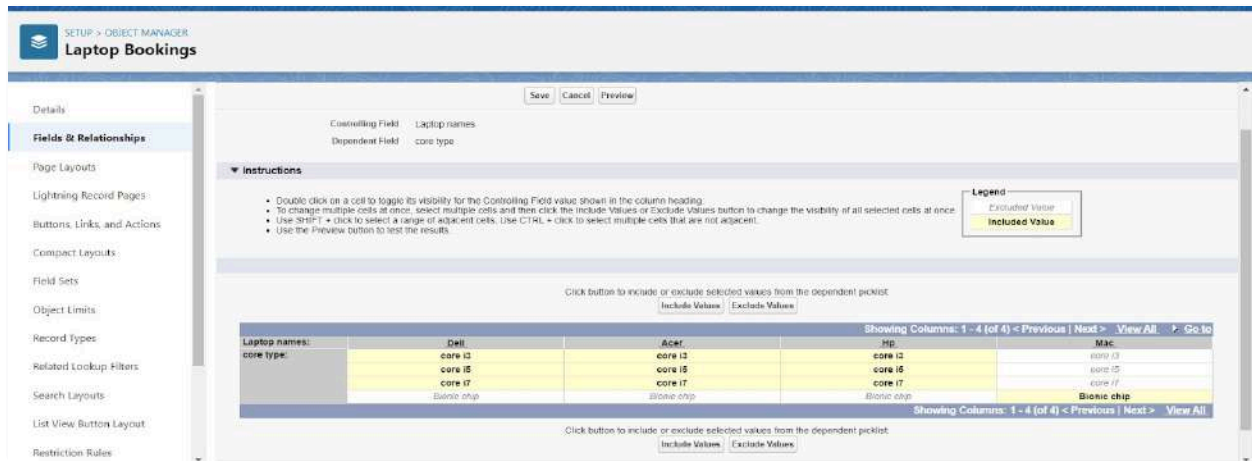
Need to use Field Dependency:

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

SETUP > OBJECT MANAGER
Laptop Bookings

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Step 2. Enter the details

Field Label: Amount

Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".

Length: 18

Decimal Places: 0

Field Name: Amount

Description:

Help Text:

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

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

Default Value: Show Formula Editor

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

SETUP > OBJECT MANAGER
Laptop Bookings

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Laptop Bookings
New Relationship

Step 2. Choose the related object

Select the other object to which this object is related.

Related To: Total laptops

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

Next

Fill the Above as following:

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

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.

The screenshot shows the Salesforce Object Manager interface for the 'Laptop Bookings' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), 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, and Restriction Rules. The main content area is titled 'Fields & Relationships' and shows a table of fields. The table has columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: Amount (Amount__c, Currency(18, 0)), core type (core__c, Picklist, Controlling Field: Laptop names), Created By (CreatedById, Lookup(User)), Laptop Bookings Name (Name, Text(80), Indexed), Laptop names (Laptop_type__c, Picklist, Controlling Field: Laptop names), Last Modified By (LastModifiedById, Lookup(User)), Name (Name__c, Master-Detail(consumer), Indexed), and Total no of laptops (TotalUno_of_laptops__c, Master-Detail(Total laptops), Indexed).

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

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

The screenshot shows the 'New Custom Field' wizard in Salesforce. The left sidebar lists navigation options: Details, Fields & Relationships (selected), 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, and Restriction Rules. The main content area is titled 'New Custom Field' and 'Step 1. Choose the field type'. It asks to 'Specify the type of information that the custom field will contain.' Under 'Data Type', there are four radio button options: 'None Selected', 'Auto Number', 'Formula', and 'Roll Up Summary' (which is selected). To the right of these options, there is explanatory text for each type. At the bottom right, there are 'Next' and 'Cancel' buttons.

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

Field Label: Laptops delivered

Field Name :It's gets auto generated

The screenshot shows the 'New Custom Field' wizard in Salesforce, now at 'Step 2. Enter the details'. The left sidebar is the same as in the previous screenshot. The main content area has fields for 'Field Label' (containing 'Laptops delivered'), 'Field Name' (containing 'Laptops_delivered'), 'Description', and 'Help Text'. Below these fields is a checkbox labeled 'Add this field to existing custom report types that contain this entity', which is checked. At the bottom right, there are 'Previous', 'Next', and 'Cancel' buttons.

Click on Next

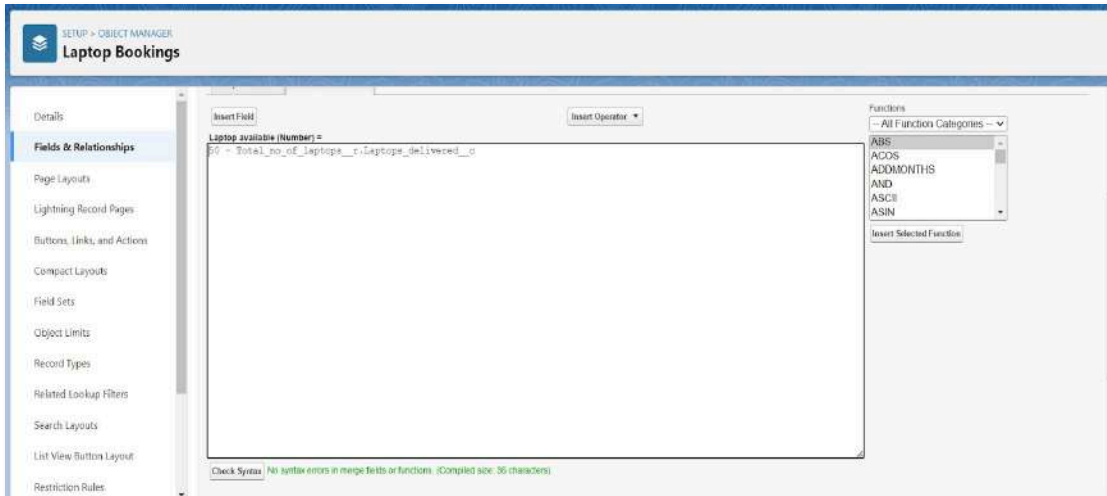
5. Select the Laptop Bookings in the Summarized Object

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.

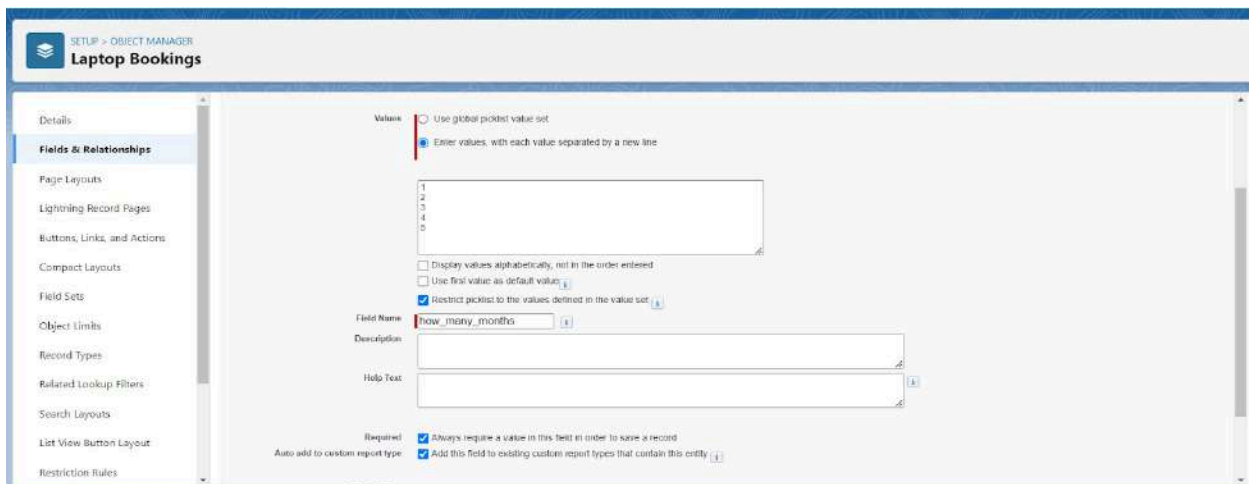
1. Now click on “Fields & Relationships” >> New
2. Select Data type as a “Formula” and Click on Next
3. Fill the Above as following:
 - Field Label: Laptops Available
 - Field Name : It's gets auto generated
 - Select the Formula Return Type as “Number”
 - Select the Decimal places as “0” and Click on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

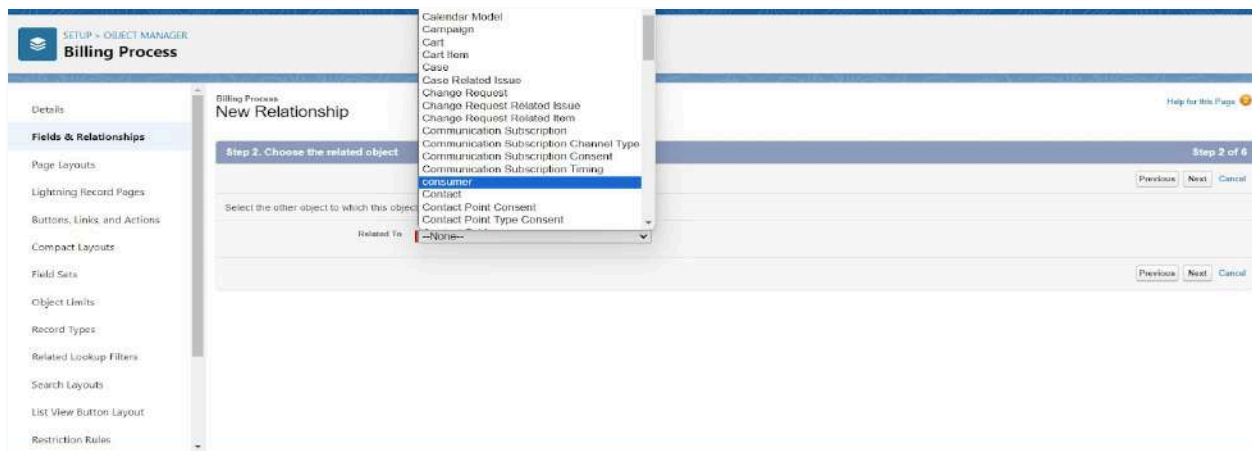
To create fields in an object:

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

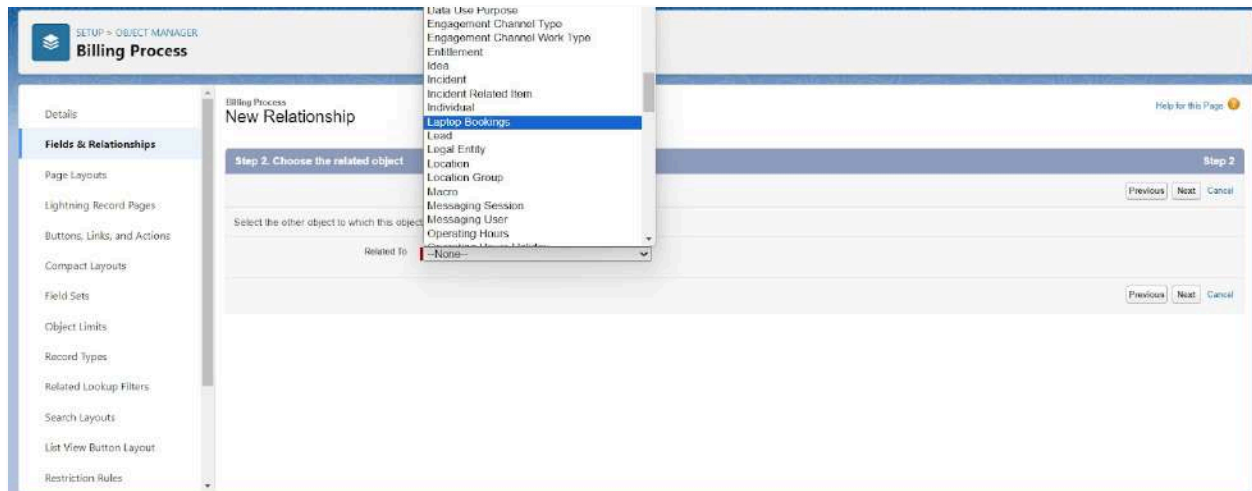


Fill the Above as following:

- 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"

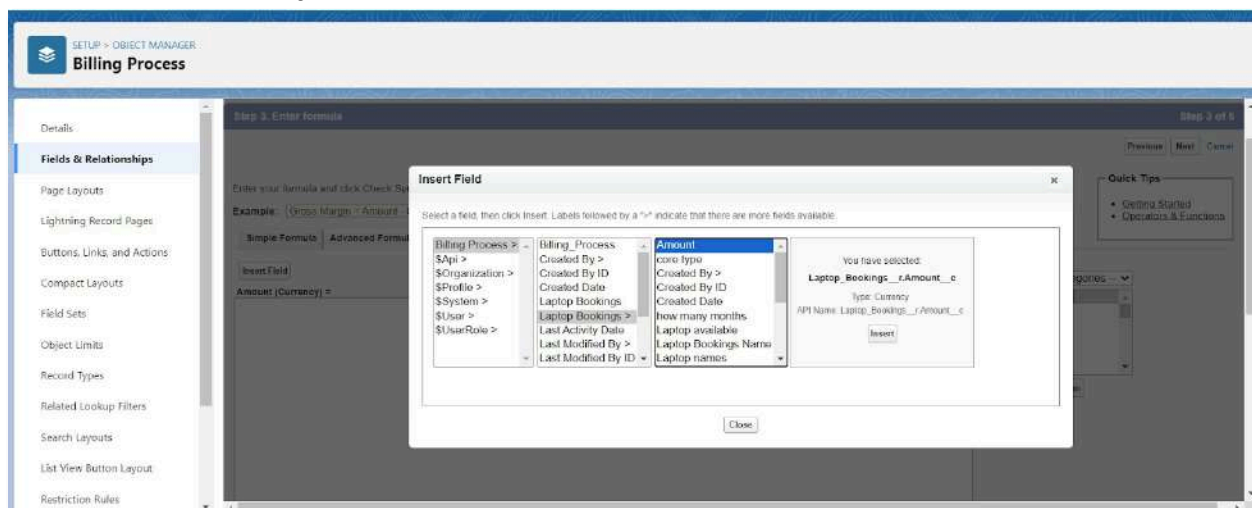
Fill the Above as following:

- 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

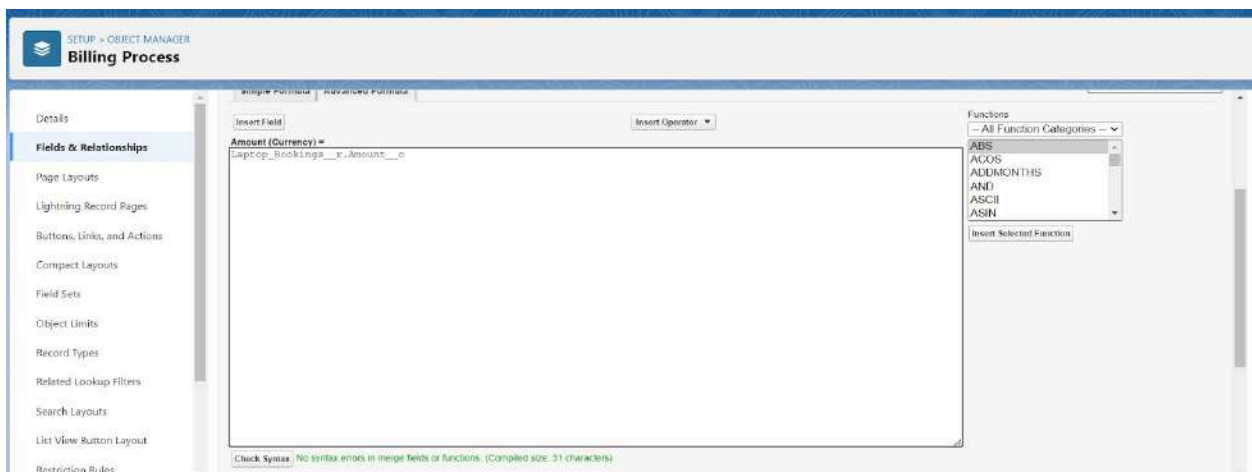
- g. Gpay
- h. Paytm
 - Select required
 - Click on Next >> Next >> Save and new.

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”

SETUP > OBJECT MANAGER
Total laptops

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules

Field Label: Field Name:

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

Formula Return Type

☐ None Selected Select one of the data types below.

☐ Checkbox Calculate a boolean value.
Example: `TODAY() > CloseDate`

☐ Currency Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: `(Gross_Margin * Amount) * 100 / 100`

☐ Date Calculate a date, for example, by adding or subtracting days to other dates.
Example: `(Forecast_Start - CloseDate) / 7`

☐ DateTime Calculate a datetime, for example, by adding a number of hours or days to another datetime.
Example: `(Next - NOW()) * 1`

☒ Number Calculate a numeric value.
Example: `(Amount * 1.5 * Custom__c * 3)`

☐ Percent Calculate a percent and automatically add the percent sign to the number.
Example: `(Discount * (Amount - Discounted_Amount)) / Amount`

☐ Text Create a text string, for example, by concatenating other text fields.
Example: `Full Name = LastName & ", " & FirstName`

☐ Time Calculate a time, for example, by adding a number of hours to another time.
Example: `(Next - TIMEVALUE(00:00:00)) * 1`

Options
Decimal Places: Example: 999

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

SETUP > OBJECT MANAGER
Total laptops

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

Simple Formula Advanced Formula

Insert Field Insert Operator

`Laptops Available (Number) = 50 - Laptops_delivered__c`

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

Functions
-- All Function Categories --
ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN
Insert Selected Function

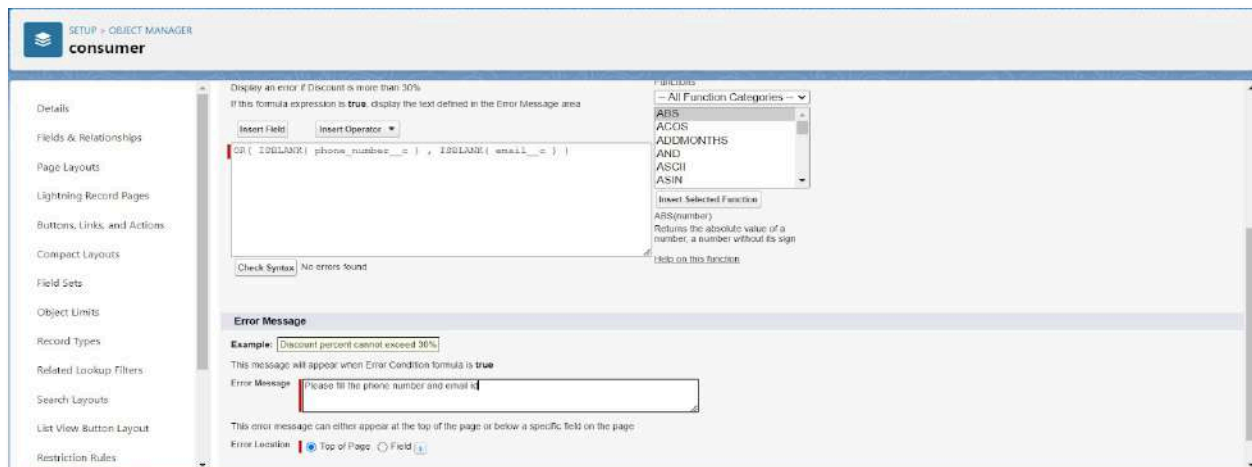
3. Click on Next >>Next >>Save and new

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 delete standard ones

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

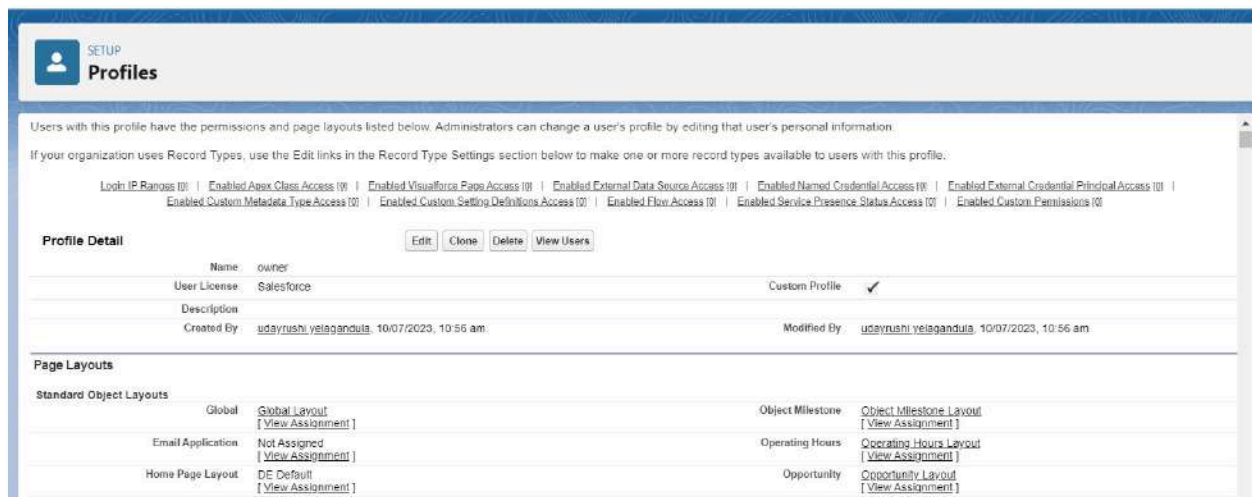
Custom Profiles:

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.



The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The header includes a 'SETUP' button and a 'Profiles' title. 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 link is provided: '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 list of permissions is displayed, including: 'Login IP Ranges [0]', 'Enabled Apex Class Access [0]', 'Enabled Visualforce Page Access [0]', 'Enabled External Data Source Access [0]', 'Enabled Named Credential Access [0]', 'Enabled External Credential Principal Access [0]', 'Enabled Custom Metadata Type Access [0]', 'Enabled Custom Setting Definitions Access [0]', 'Enabled Flow Access [0]', 'Enabled Service Presence Status Access [0]', and 'Enabled Custom Permissions [0]'.

The 'Profile Detail' section shows the following information:

Name	owner
User License	Salesforce
Description	
Created By	udayrushi velagandula 10/07/2023, 10:56 am
Modified By	udayrushi velagandula 10/07/2023, 10:56 am

The 'Page Layouts' section shows the following assignments:

Standard Object Layouts	
Global	Global Layout [View Assignment]
Email Application	Not Assigned [View Assignment]
Home Page Layout	DE Default [View Assignment]
Object Milestone	Object Milestone Layout [View Assignment]
Operating Hours	Operating Hours Layout [View Assignment]
Opportunity	Opportunity Layout [View Assignment]

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

The screenshot shows the 'SETUP Profiles' page. Under 'Custom Object Permissions', there are two tables. The left table has columns for 'Basic Access' (Read, Create, Edit, Delete) and 'Data Administration' (View All, Modify All). The right table has the same columns. The objects listed are Billing Process, consumers, Laptop Bookings, and Total Laptops. The permissions are set as follows:

Object	Read	Create	Edit	Delete	View All	Modify All
Billing Process	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<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"/>
Laptop Bookings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Total Laptops	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Below the tables, there are 'Session Settings' and 'Password Policies' sections. Session Times Out After is set to '2 hours of inactivity'. Session Security Level Required at Login is set to '--None--'.

3. Give Access and Save it.

Agent Profile

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

2. While still on the profile page, then click Edit.

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

The screenshot shows the 'SETUP Profiles' page. Under 'Custom Object Permissions', there are two tables. The left table has columns for 'Basic Access' (Read, Create, Edit, Delete) and 'Data Administration' (View All, Modify All). The right table has the same columns. The objects listed are Billing Process, consumers, Laptop Bookings, and Total Laptops. The permissions are set as follows:

Object	Read	Create	Edit	Delete	View All	Modify All
Billing Process	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
consumers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Laptop Bookings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Total Laptops	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Below the tables, there are 'Session Settings' and 'Password Policies' sections. Session Times Out After is set to '2 hours of inactivity'. Session Security Level Required at Login is set to '--None--'.

Password Policies

- User passwords expire in: 90 days
- Enforce password history: 3 passwords remembered
- Minimum password length: 8
- Password complexity requirement: Must include alpha and numeric characters
- Password question requirement: Cannot contain password
- Maximum invalid login attempts: 10
- Lockout effective period: 45 minutes

Give access and save it.

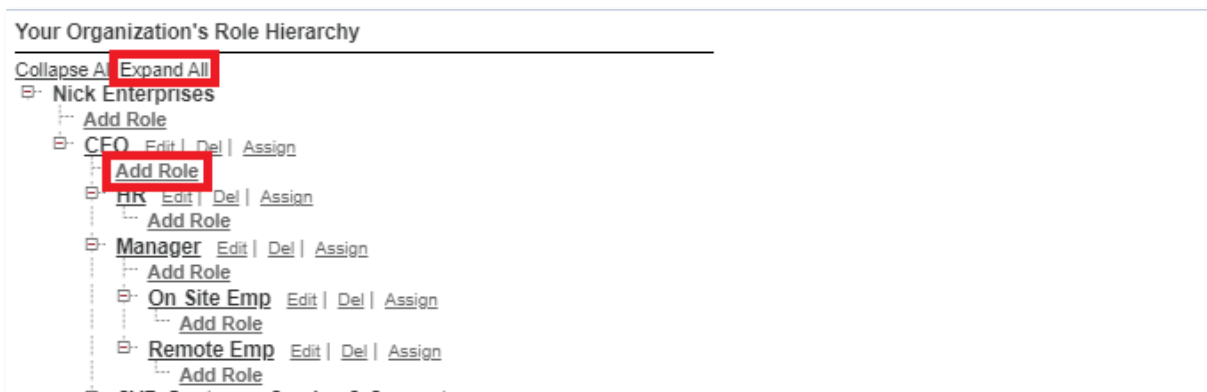
Roles and Hierarchy:

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.

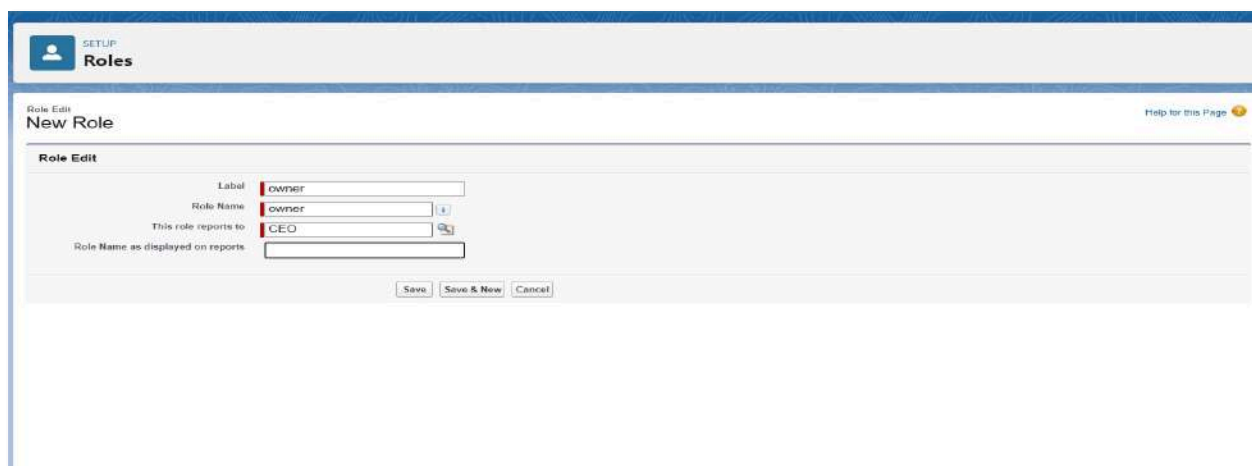
Creating owner Role

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.

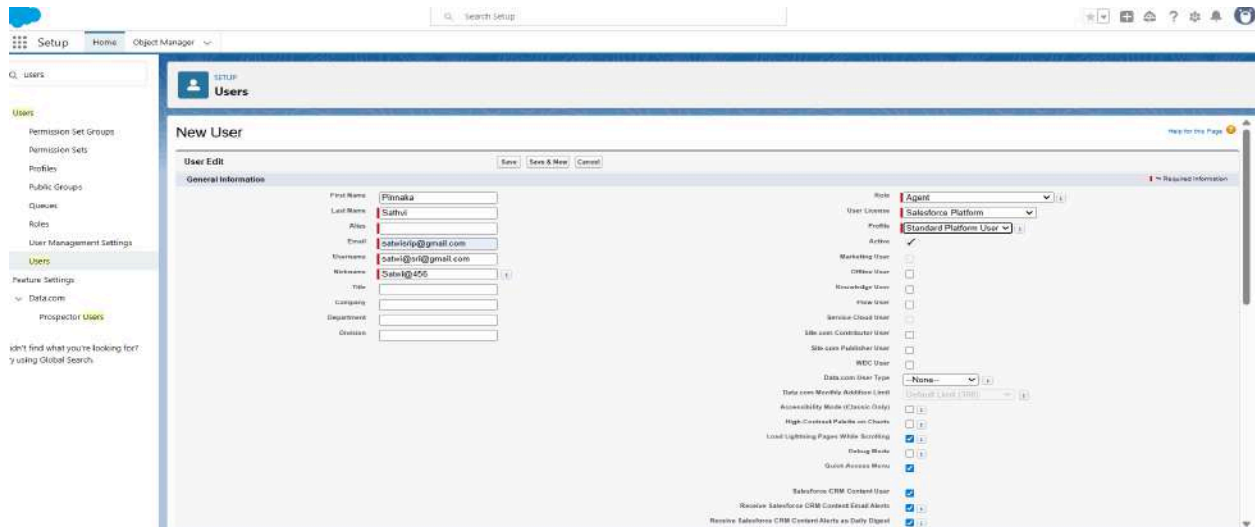


1. Go to setup - type users in quick find box - select users -click New user.
2. Fill in the fields
3. First Name : Sathvi

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

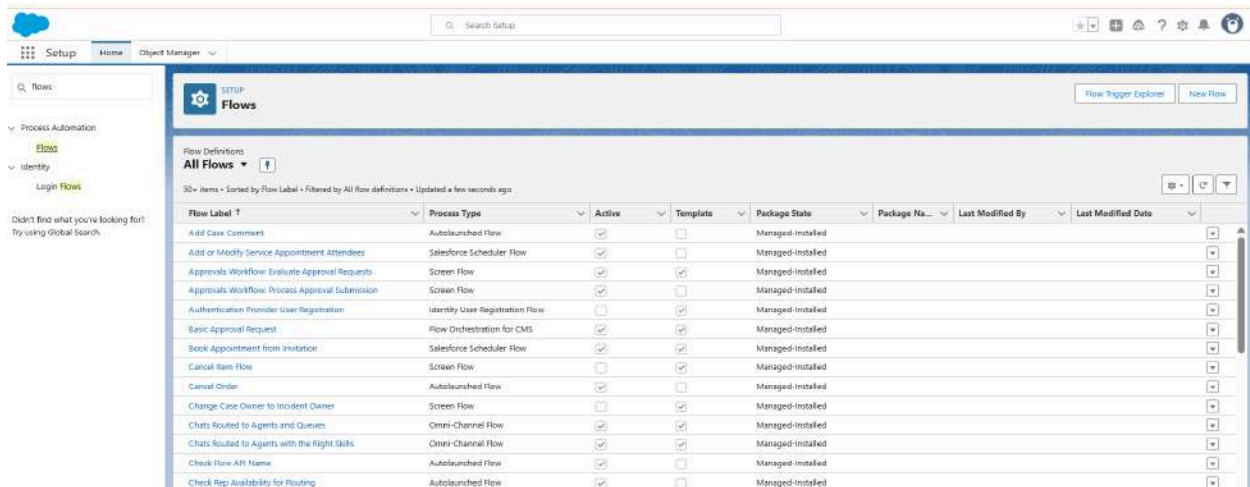
- **Screen Flows** – Guide users with screens for data entry or display.
- **Autolaunched Flows** – Run automatically in the background (e.g., on record create/update).
- **Scheduled Flows** – Run at specific times or intervals.
- **Record-Triggered Flows** – Triggered when records meet conditions.
-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

Why create a flow?

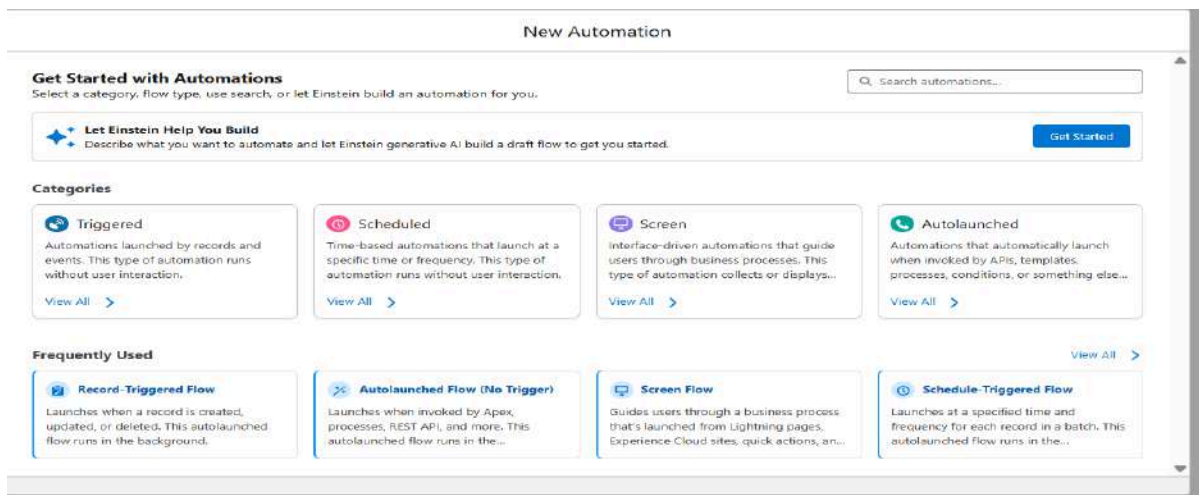
To automatically populate the **Amount field** based on the **selected laptop type**, ensuring values are filled without manual input.

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.

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_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.

The screenshot shows the 'Edit Decision' interface. At the top, there are fields for '* Label' (months_selected) and '* API Name' (months_selected). Below these is a 'Description' field. The main section is titled 'Outcomes' and contains a table with columns 'OUTCOME ORDER' and 'OUTCOME DETAILS'. The table has 5 rows. The first row is selected and shows details for outcome 1: '* Label' is '1', '* Outcome API Name' is 'X1', 'Condition Requirements to Execute Outcome' is 'All Conditions Are Met (AND)', 'Resource' is '\$Record > how many months X', 'Operator' is 'Equals', and 'Value' is '1'. There are 'Delete Outcome', 'Cancel', and 'Done' buttons at the bottom right.

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

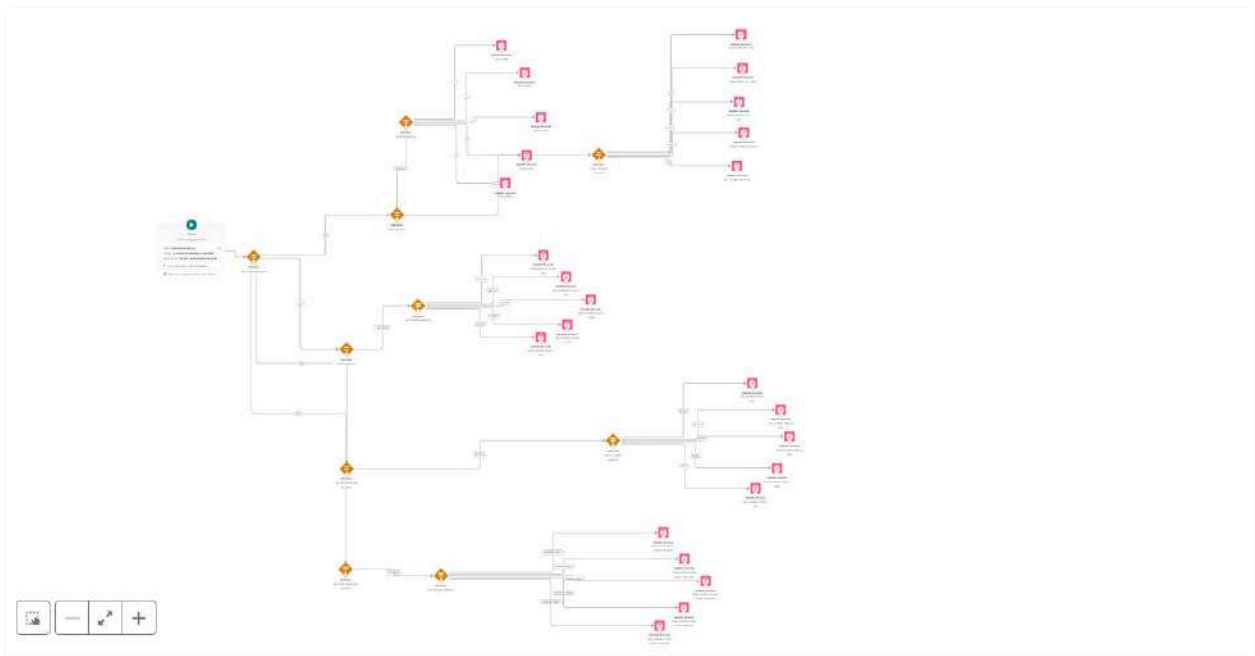
52. Click done.

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.

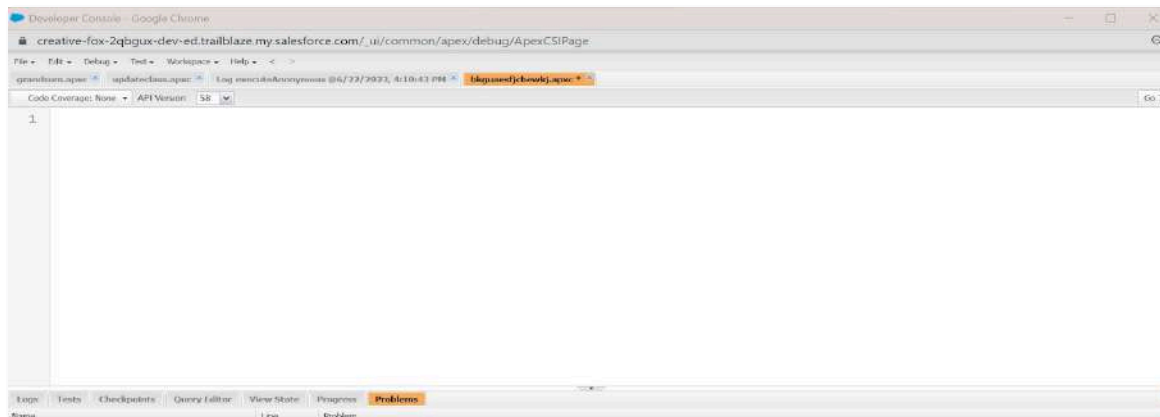
APEX:

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, New and 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).


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

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.

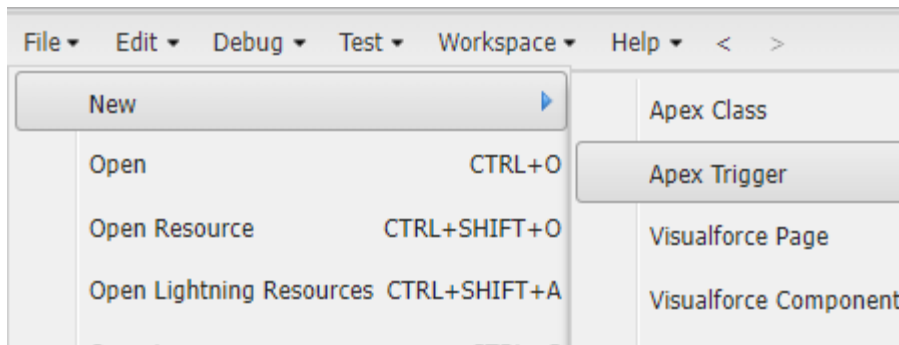
Types of Triggers

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 with



Syntax For creating trigger :

The syntax for creating trigger is :

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

}
```

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

Trigger Code:

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

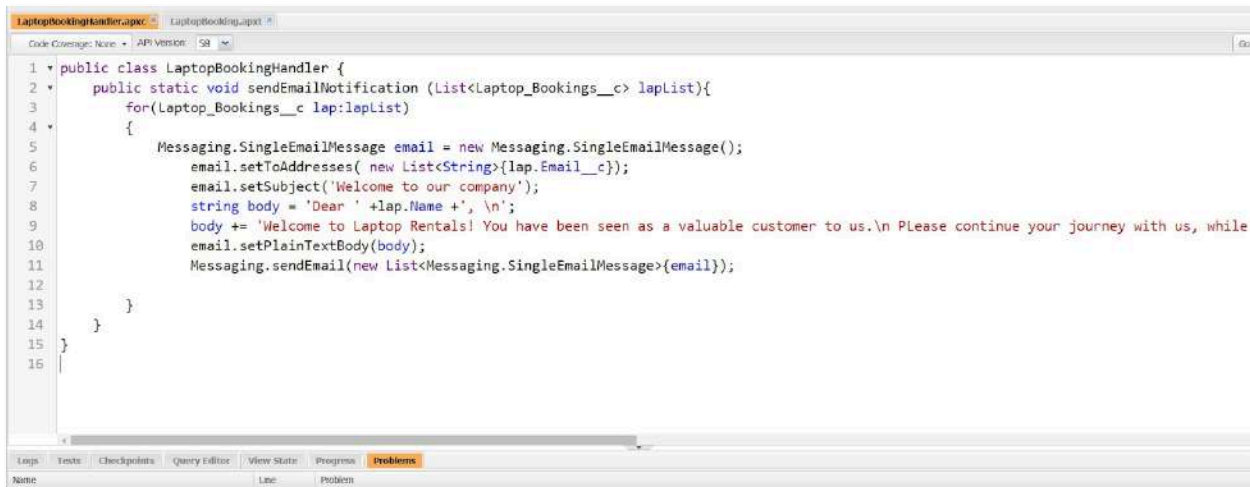
```
    if (Trigger.isAfter && (Trigger.isInsert || Trigger.isUpdate)) {
```

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

}}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);  
        }  
    }  
}
```

```

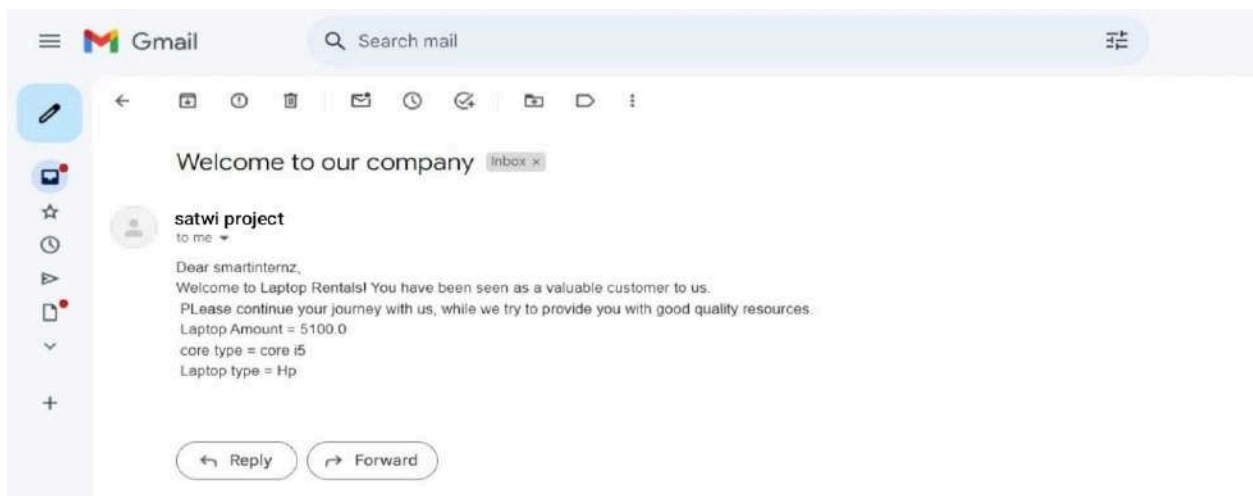
Messaging.sendEmail(new List<Messaging.SingleEmailMessage>{email});
    }
}
}

```

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).

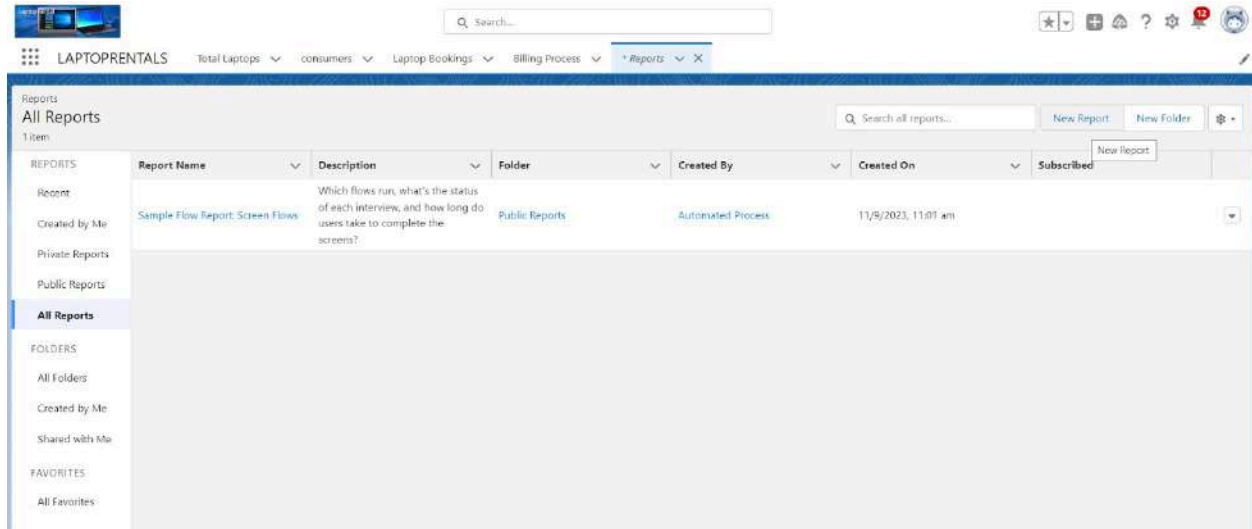
4. **Joined Reports** – Combine multiple report types into blocks for a single view.
Example: Opportunities, cases, and activities for accounts in one report.

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.

Edit Bucket Column

*Field

Amount
×

*Bucket Name

types of versions
×

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

☒ Treat empty Amount values in the report as zeros.

Cancel
Apply

Click apply it.

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

The screenshot shows the SAP Analytics Cloud interface for a report titled "Laptop Rentals". The report is configured with "Types of Versions" as the primary dimension for grouping rows. The report preview displays data for various laptop models and their availability. The columns shown are "Laptop Bookings: Laptop Bookings", "Consumer: consumer Name", "Amount", "Laptops Available", and "Total Laptops: Total Laptops". The report is currently in "Preview" mode, and the "Run" button is visible.

Types of Versions	Laptop Bookings: Laptop Bookings	Consumer: consumer Name	Amount	Laptops Available	Total Laptops: Total Laptops
Basic (1)	Dell i3	Shruthi	₹1,000	48	Dell core i3 50
Subtotal			₹1,000	48	
Intermediate (1)	Acer	Swotha	₹1,500	46	50
Subtotal			₹1,500	46	50
High (4)	Acer	Swotha	₹4,800	46	50
	Acer	Swotha	₹3,800	46	50
	Acer	Swotha	₹3,000	46	50
	Dell i3 Booking	Shruthi	₹5,000	48	Dell core i3 50
Subtotal			₹17,400	94	
Total (6)			₹19,900	94	

Click on Save & run it.

Report: Total Laptops with Laptop Bookings and Consumer

Laptop Analytics

Total Records: 6 Total Amount: ₹19,900 Total Laptops Available: 94

Types of Versions	Laptop Bookings: Laptop Bookings	Consumer: consumer Name	Amount	Laptops Available	Total Laptops: Total Laptops
Basic (1)	Dell i3	Shruthi	₹1,000	48	Dell core i3 50
Subtotal			₹1,000	48	
Intermediate (1)	Acer	Swetha	₹1,500	46	50
Subtotal			₹1,500	46	
High (4)	Acer	Swetha	₹4,800	46	50
	Acer	Swetha	₹3,800	46	50
	Acer	Swetha	₹3,800	46	50
	Dell i3 Booking	Shruthi	₹5,000	48	Dell core i3 50
Subtotal			₹17,400	94	
Total (6)			₹19,900	94	

Row Counts ☒ Detail Rows ☒ Subtotals ☒ Grand Total ☒

Create Report

Category

Recently Used

- All
- Accounts & Contacts
- Opportunities
- Customer Support Reports
- Leads
- Campaigns
- Activities
- Contracts and Orders
- Price Books, Products and Assets
- Administrative Reports
- File and Content Reports
- Individuals
- Other Reports
- Hidden Report Types

Select a Report Type

Showing results for total

Report Type Name	Category
Activities with Total Laptops	Standard
Total Laptops	Standard
Total Laptops with Laptop Bookings and consumer	Standard
Total Laptops History	Standard
consumer with Laptop Bookings and Total Laptops	Standard

Details

Total Laptops with Laptop Book...
Standard Report Type

Created By You
Amount

Created By Others
No Reports Yet

Objects Used in Report Type

- Laptop Bookings
- User
- Owner
- consumer
- Total Laptops
- Role

Sharing report to owner:

Click edit drop down and select subscribe option

Report: Total Laptops with Laptop Bookings and Consumer

Laptop Analytics

Total Records: 6 Total Amount: ₹19,900 Total Laptops Available: 94

Types of Versions	Laptop Bookings: Laptop Bookings	Consumer: consumer Name	Amount	Laptops Available	Total Laptops: Total Laptops
Basic (1)	Dell i3	Shruthi	₹1,000	48	Dell core i3 50
Subtotal			₹1,000	48	
Intermediate (1)	Acer	Swetha	₹1,500	46	50
Subtotal			₹1,500	46	
High (4)	Acer	Swetha	₹4,800	46	50
	Acer	Swetha	₹3,800	46	50
	Acer	Swetha	₹3,800	46	50
	Dell i3 Booking	Shruthi	₹5,000	48	Dell core i3 50
Subtotal			₹17,400	94	
Total (6)			₹19,900	94	

Row Counts ☒ Detail Rows ☒ Subtotals ☒ Grand Total ☒

Edit dropdown menu:

- Save As
- Save
- Subscribe**
- Export
- Delete
- Add to Dashboard

Follow as per below image.

The screenshot shows a web-based 'Edit Subscription' window. It contains several sections: 'Frequency' with three buttons (Daily, Weekly, Monthly), 'Time' with a dropdown menu showing '8:00 am', 'Attachment' with an 'Attach File' button, 'Recipients' with 'Send email to Me' and an 'Edit Recipients' button, and 'Run Report As' with two radio buttons ('Me' and 'Another Person'). The 'Another Person' radio button is selected. At the bottom right, there are 'Cancel' and 'Save' buttons.

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.

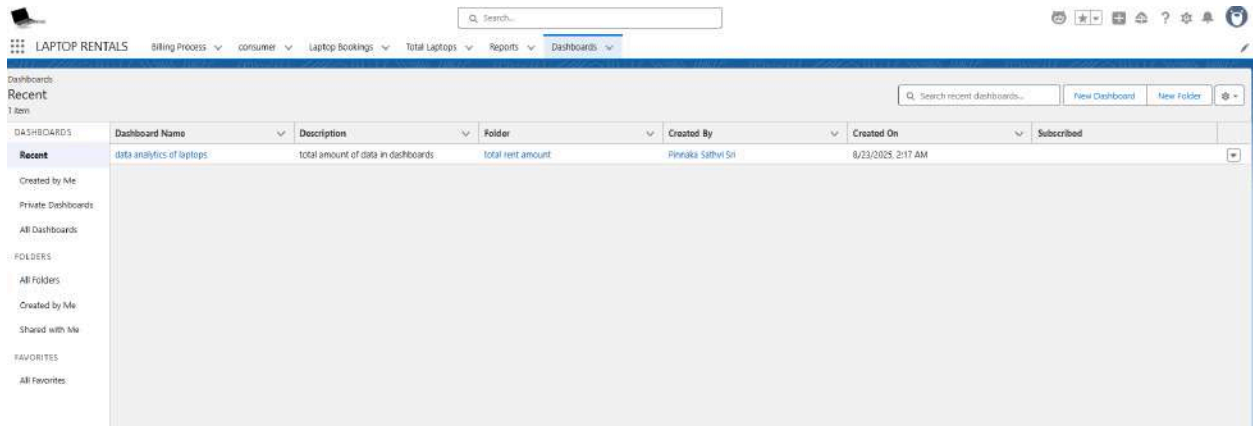
Click the new folder, give the folder label as “total rent amount”.

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.

The 'New Dashboard' form is displayed. It contains three input fields: 'Name' with the value 'data analytics of laptops', 'Description' with the value 'total amount of data in dashboards', and 'Folder' with the value 'total rents amount'. A 'Select Folder' button is located to the right of the folder input field. At the bottom right of the form, there are two buttons: 'Cancel' and 'Create'.

3. Select add component.






Select a Report and click on select.





Add Component


consumer with laptops and total lapt ✕

☐ Use chart settings from report i

Display As



123



Value

Sum of Amount


Sliced By

types of versions

Preview

consumer with laptops and total laptops

Sum of Amount



types of versions
intermediate ●
high ●
very high ●

View Report (consumer with laptops and total laptops)

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