

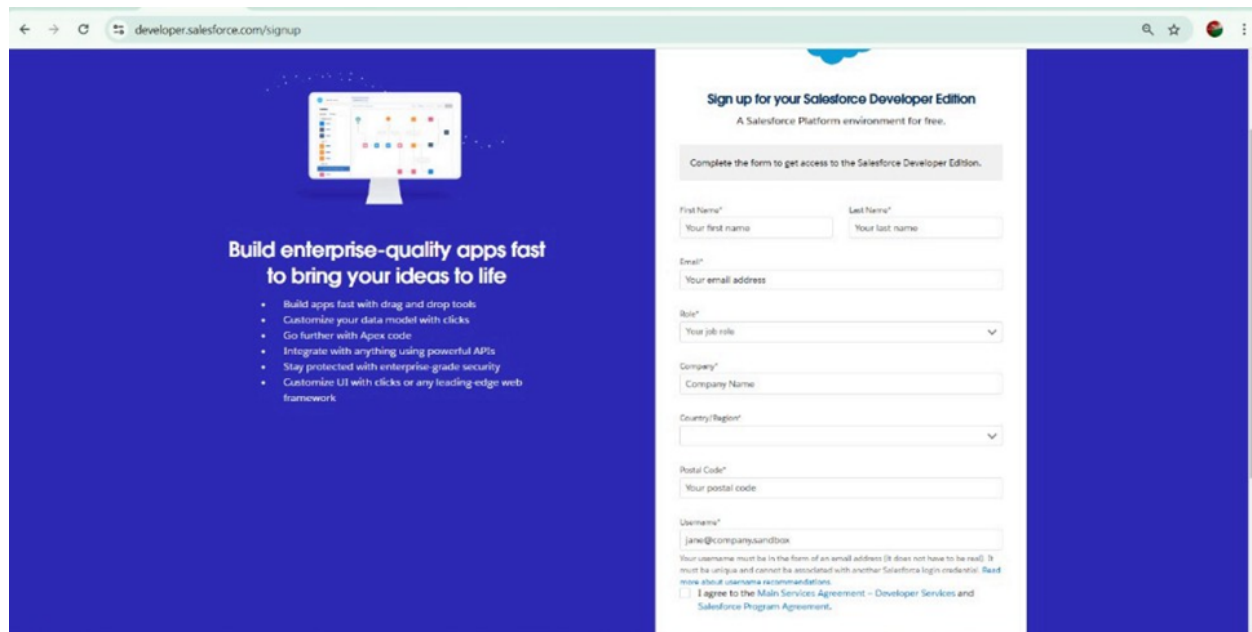
A CRM APPLICATION FOR LAPTOP RENTALS

CRM

Application on Laptop rentals is about delivering the items to the customers by rental purpose. It leverages the power of customer relationship management (CRM) to enhance customer experiences, optimize store operations, and improve overall efficiency. Additionally to these, we also need to do an effective CRM i.e via communicating through email with the potential customers identified.

Salesforce:

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers. Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.



The screenshot shows the Salesforce Developer Edition sign-up page. The left side features a blue background with a white monitor icon displaying a Salesforce interface. Below the icon, the text reads: "Build enterprise-quality apps fast to bring your ideas to life". A bulleted list follows: "• Build apps fast with drag and drop tools", "• Customize your data model with clicks", "• Go further with Apex code", "• Integrate with anything using powerful APIs", "• Stay protected with enterprise-grade security", and "• Customize UI with clicks or any leading edge web framework". The right side of the page is white and contains the sign-up form. The form title is "Sign up for your Salesforce Developer Edition" with a subtitle "A Salesforce Platform environment for free." Below this is a grey box with the text "Complete the form to get access to the Salesforce Developer Edition." The form fields include: "First Name*" (placeholder: "Your first name"), "Last Name*" (placeholder: "Your last name"), "Email*" (placeholder: "Your email address"), "Role*" (dropdown menu with "Your job role" selected), "Company*" (placeholder: "Company Name"), "Country/Region*" (dropdown menu), "Postal Code*" (placeholder: "Your postal code"), and "Username*" (placeholder: "jane@company.com"). Below the username field is a note: "Your username must be in the form of an email address (it does not have to be real). It must be unique and cannot be associated with another Salesforce login credential. Read more about username recommendations." At the bottom of the form is a checkbox labeled "I agree to the Main Services Agreement - Developer Services and Salesforce Program Agreement."

Object Creation:

What Is an Object?

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

- a. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
- b. Enter the label name >> Total Laptops
- c. Plural label name >> Total Laptops
- d. Enter Record Name Label and Format Record Name >> Total Laptops Data Type >> Text
- e. Click on Allow reports, Allow search and Track Field History
- f. Allow search >> Save.

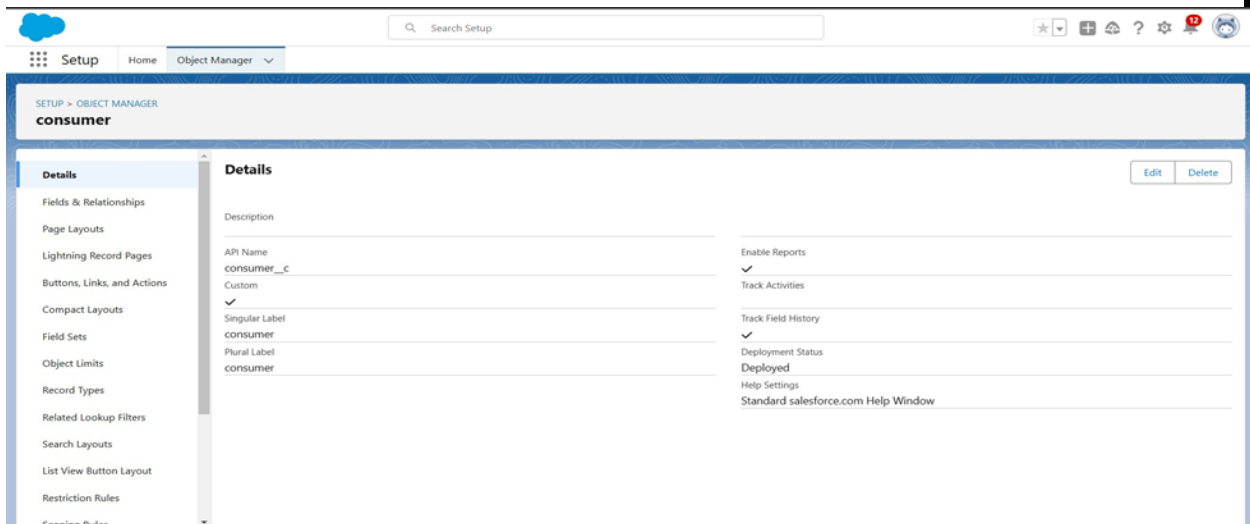
The screenshot shows the Salesforce Setup interface for the 'Total Laptops' custom object. The breadcrumb trail is 'SETUP > OBJECT MANAGER'. The left sidebar contains a list of configuration options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The 'Details' section is active, showing the following configuration:

Field	Value
Description	
API Name	Total_Laptop__c
Custom	✓
Singular Label	Total Laptops
Plural Label	Total Laptops
Enable Reports	✓
Track Activities	✓
Track Field History	✓
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Buttons for 'Edit' and 'Delete' are located in the top right corner of the configuration area.

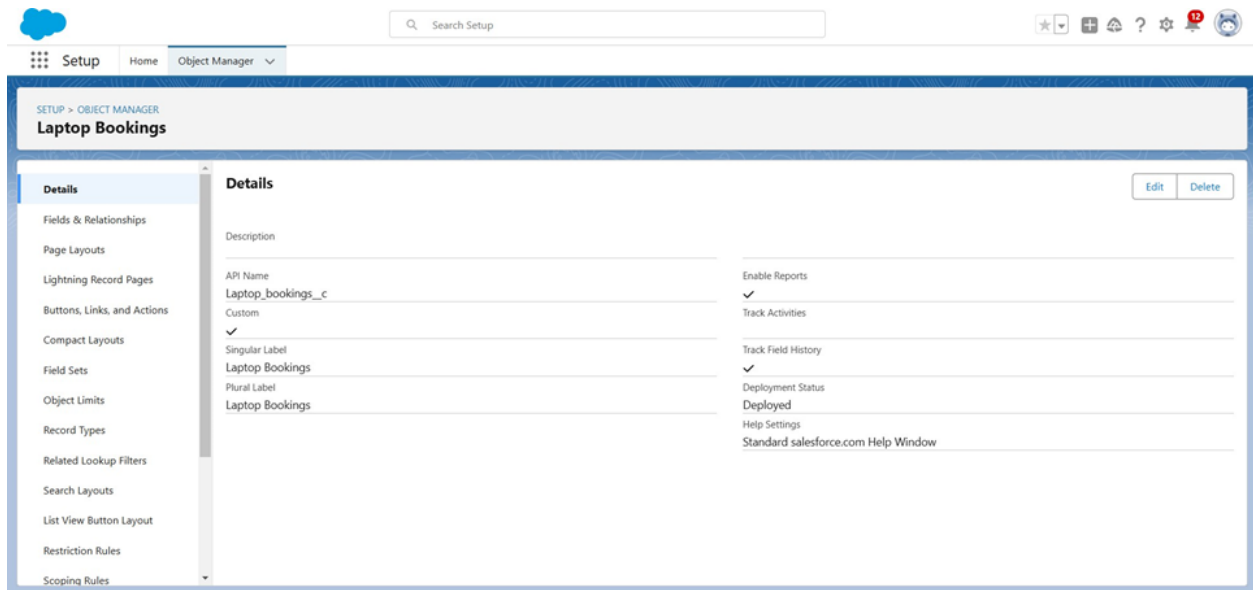
Create consumer Object

- g. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
- h. Enter the label name >> consumer
- i. Plural label name >> consumer
- j. Enter Record Name Label and Format Record Name >> consumer_name
Data Type >> Name
- k. Click on Allow reports, Allow search and Track Field History,
- l. Allow search >> Save.



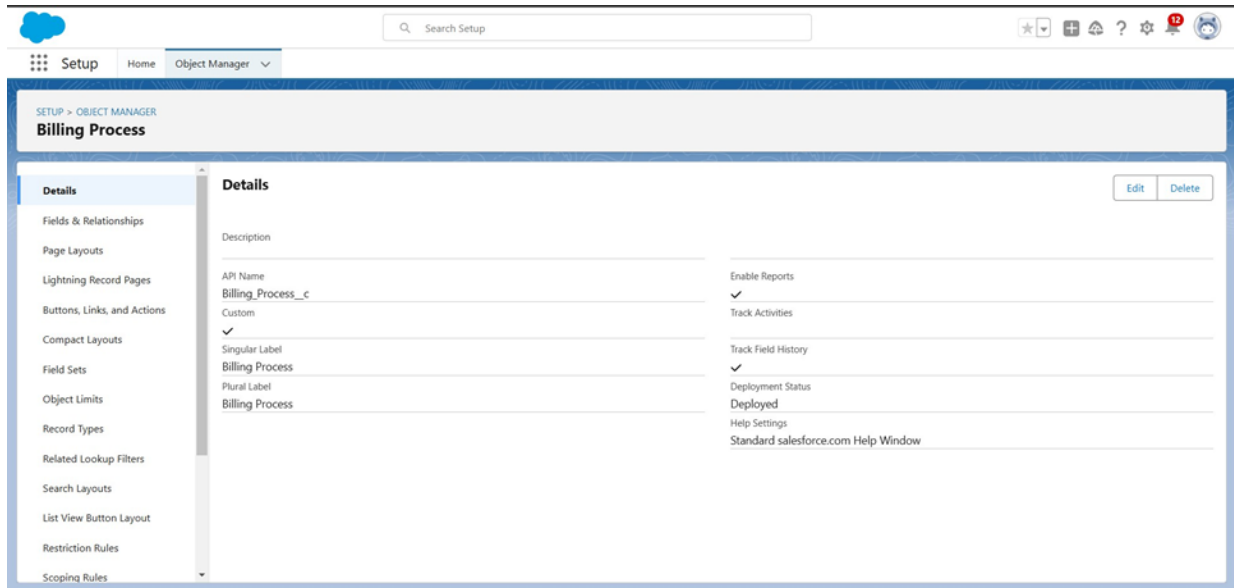
Create Laptop Bookings Object

- m. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
- n. Enter the label name >> Laptop bookings
- o. Plural label name >> Laptop bookings
- p. Enter Record Name Label and Format Record Name >> consumer_name
Data Type >> Name
- q. Click on Allow reports, Allow search and Track Field History,
- r. Allow search >> Save.



Create Billing Process Object

- s. From the setup page >> Click on Object Manager>> Click on Create >> Click on Custom Object.
- t. Enter the label name >> Billing process
- u. Plural label name >>Billing process
- v. Enter Record Name Label and Format Record Name >> consumer_name
Data Type >> Name
- w. Click on Allow reports, Allow search and Track Field History,
- x. Allow search>> Save.



Tabs

What is Tab: 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:

- i. **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.
- ii. **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.
- iii. **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.

- iv. **Lightning Component Tabs:** Lightning Component tabs allow you to add

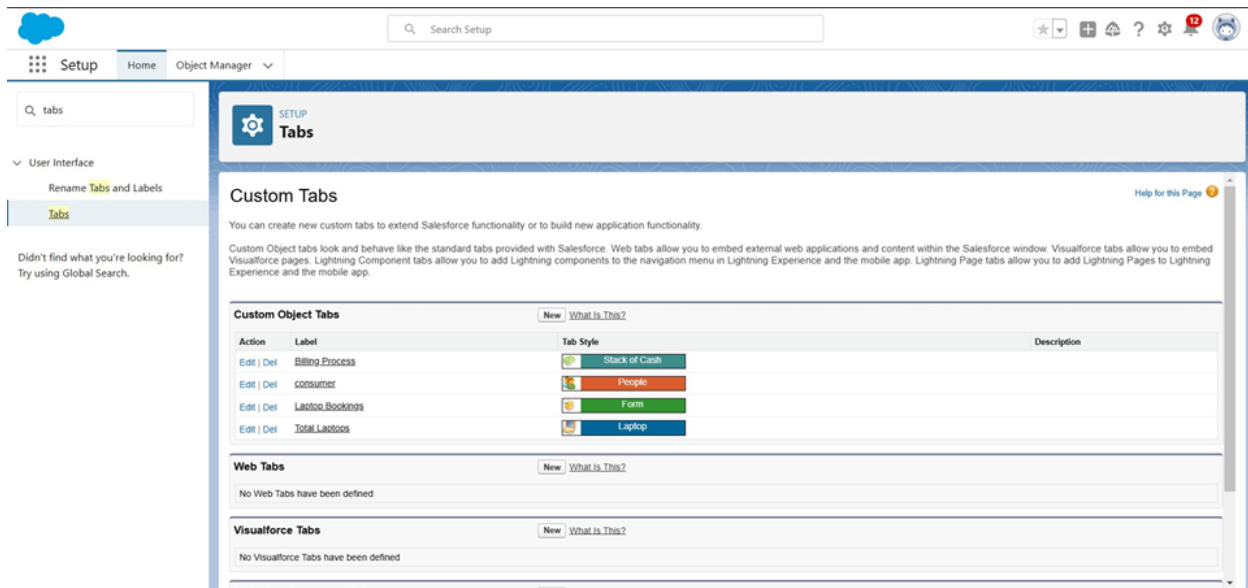
Lightning components to the navigation menu in Lightning Experience and the mobile app.

- v. **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:

- y. Goto setup page >> Type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)
- z. Select Object (Total Laptops) >> Select the tab style >> Next (Add to roles page) keep it as default >> Next (Add to Custom App) uncheck the include tab.
- aa. Make sure that the Append tab to users' existing personal customizations is checked.
- ab. Click save.



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 LightningApp To create a lightningapp page:

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

ad. Fill the app name in app details as LAPTOP RENTALS >>Next >> (App options page) keep it as default >> Next >> (Utility Items) keep it as default >> Next.

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

af. 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.

ag. To Add User Roles:Search roles (Systemadministrator) in the search bar >> click on the arrow button >> save & finish.

The screenshot displays the 'App Details & Branding' configuration page in the Lightning App Builder. The left sidebar shows the 'App Settings' menu with options like 'App Details & Branding', 'App Options', 'Utility Items (Desktop Only)', 'Navigation Items', and 'User Profiles'. The main content area is divided into two sections: 'App Details' and 'App Branding'. In the 'App Details' section, the 'App Name' is set to 'LAPTOP RENTALS', the 'Developer Name' is 'LAPTOP_RENTALS', and there is a text input for the 'Description'. The 'App Branding' section includes an 'Image' upload area with a placeholder image of a laptop, a 'Primary Color Hex Value' dropdown set to '#0070D2', and a 'Clear' button. Below this, there are 'Org Theme Options' with a checkbox to 'Use the app's image and color instead of the org's custom theme'. At the bottom, an 'App Launcher Preview' shows the app icon and name 'LAPTOP RENTALS'.

Fields

When we talk about Salesforce, Fields represent the data stored in the columns of a relational database. It can also hold any valuable information that you require for a specific object. Hence, the overall searching, deletion, and editing of the records become simpler and quicker. Types of Fields:

1. **Standard Fields:** As the name suggests, the Standard Fields are the predefined fields in Salesforce that perform a standard task. The main point is that you can't simply

delete a Standard Field until it is a non-required standard field. Otherwise, users have the option to delete them at any point from the application freely.

Moreover, we have some fields that you will find common in every Salesforce application. They are,

>>Created By

>>Owner

>> Last Modified

>> Field Made During object Creation

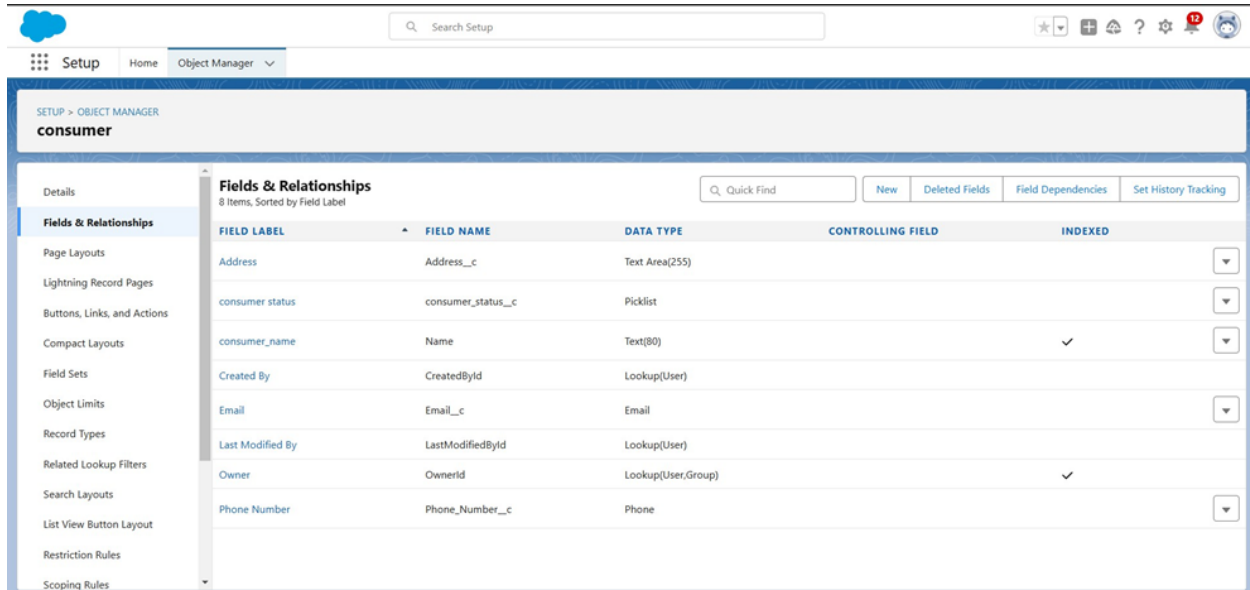
2. **Custom Fields:** On the other side of the coin, Custom Fields are highly flexible, and users can change them according to requirements. Moreover, each organizer or company can use them if necessary. It means you need not always include them in the records, unlike Standard fields. Hence, the final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

Creating the field in consumer object To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(consumer) in search bar >> click on the object.
2. Now click on "Fields & Relationships" >> New
3. Select Data Type as a "Phone" and Click on Next

To create another fields in an object:

1. Go to setup >> click on Object Manager >> type object name(consumer) in search bar >> click on the object.
2. Now click on "Fields & Relationships" >> New
3. Select Data type as a "Email" and Click on Next



SETUP > OBJECT MANAGER
consumer

Details

Fields & Relationships
8 Items, Sorted by Field Label

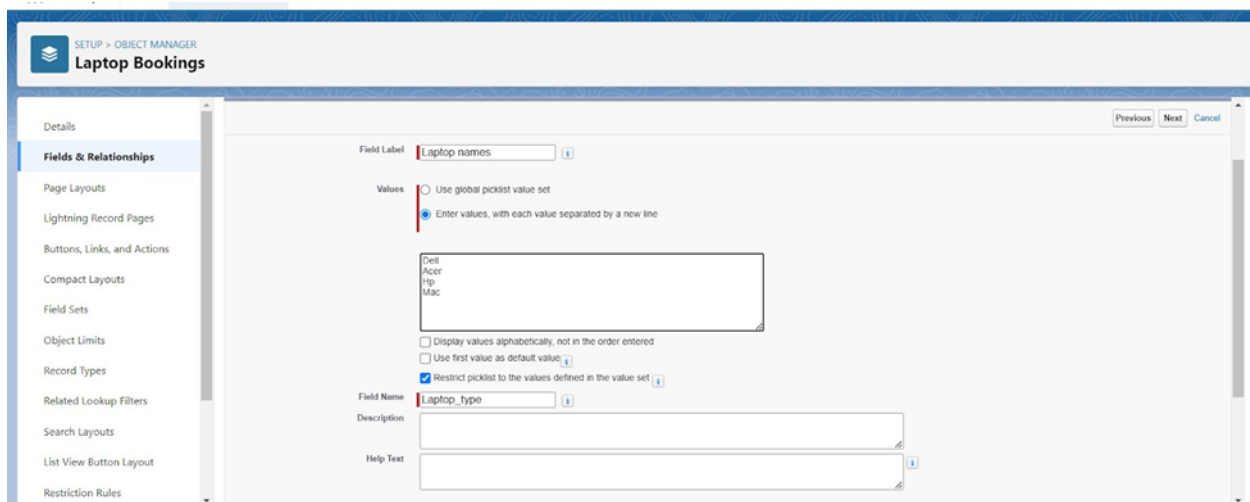
Q Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Text Area(255)		
consumer status	consumer_status__c	Picklist		
consumer_name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone Number	Phone_Number__c	Phone		

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

Creating the field in Laptops Bookings object To create fields in an object:

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



SETUP > OBJECT MANAGER
Laptop Bookings

Details

Fields & Relationships

Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
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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

☐ 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

- e. Select required
- f. Click on Next >> Next >> Save and new

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

To create fields& relationship to an object:

- a. Goto setup >>click on Object Manager >> type object name(Laptop Booking) in the search bar >> click on the object.
- b. Now click on "Fields& Relationships" >>New
- c. Select Data Type as a "Picklist"

The screenshot shows the Salesforce Setup interface for the 'Laptop Bookings' object. The 'Fields & Relationships' section is active. The 'Field Label' is 'Processors'. The 'Values' section shows a list of processor types: core i3, core i5, core i7, and bionic chip. The 'Field Name' is 'Processors'. The 'Description' and 'Help Text' fields are empty. The 'Required' checkbox is checked, and the 'Add this field to existing custom report types that contain this entity' checkbox is also checked.

- d. Picklist values are:-1.core i3 2. Core i5 3. Core i7.
- e. Select required
- f. Click on Next >> Next >> Save and new

NOTE:-

Field Dependency:

1. 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:

1. By using the field dependency we can get the different Values by selecting the different Picklist.

To create fields & relationship to an object:

1. Go to setup >> click on Object Manager >> type object name(Laptop Booking) in the search bar >> click on the object.
2. click field dependency and next
3.
Click the includevalue for dell-core i3,i5,i7 and for acer i3,i4,i5and for hp i3,i4,i5 and also for mac bionic chip include the values for it.

To Create a Fields & Relationship for Billing Process Object

1. Goto setup >>click on Object Manager >>type object name(Billing Process) in the search bar >> click on the object.
2. Now click on "Fields& Relationships" >>New
3. Select Data Type as a "Master-detail Relationship"
4. Click on Next
5. Click on the Related to drop down and Selectthe consumer objectand click on

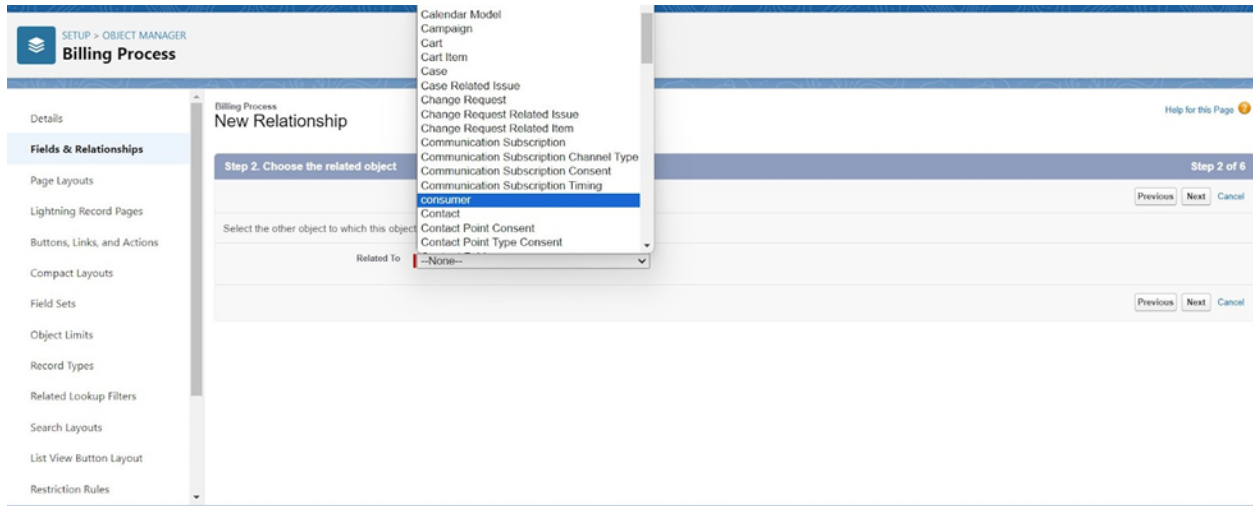
The screenshot shows the Salesforce Setup interface. The main content area is titled "Edit Field Dependency" for the "Laptop names" object. It features a table with columns for "Laptop names", "Dell", "HP", and "Mac". The table lists various processor models: "core i3", "core i5", "core i7", and "Bionic chip". A legend indicates that yellow cells represent "Included Value" and white cells represent "Excluded Value". The interface includes a search bar, navigation tabs, and a sidebar with various setup options.

Laptop names:	Dell	HP	Mac
Processors:	core i3	core i3	core i3
	core i5	core i5	core i5
	core i7	core i7	core i7
	Bionic chip	Bionic chip	Bionic chip

Next

6. Change the FieldLabel: Name

7. click on Next >>Next >> Save and new



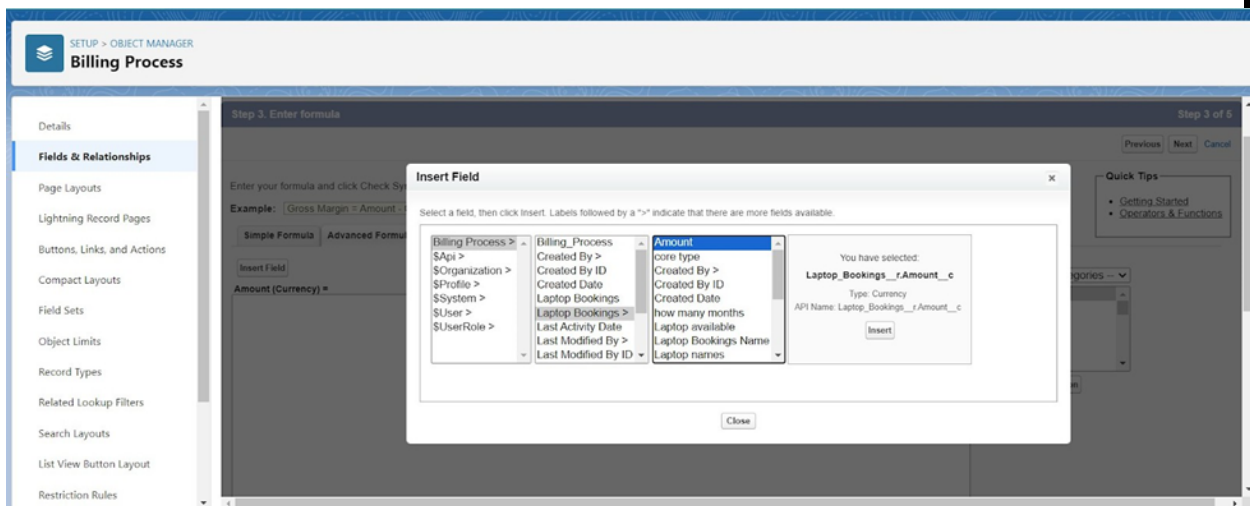
Creation of another fields for the billing process object To create fields in an object:

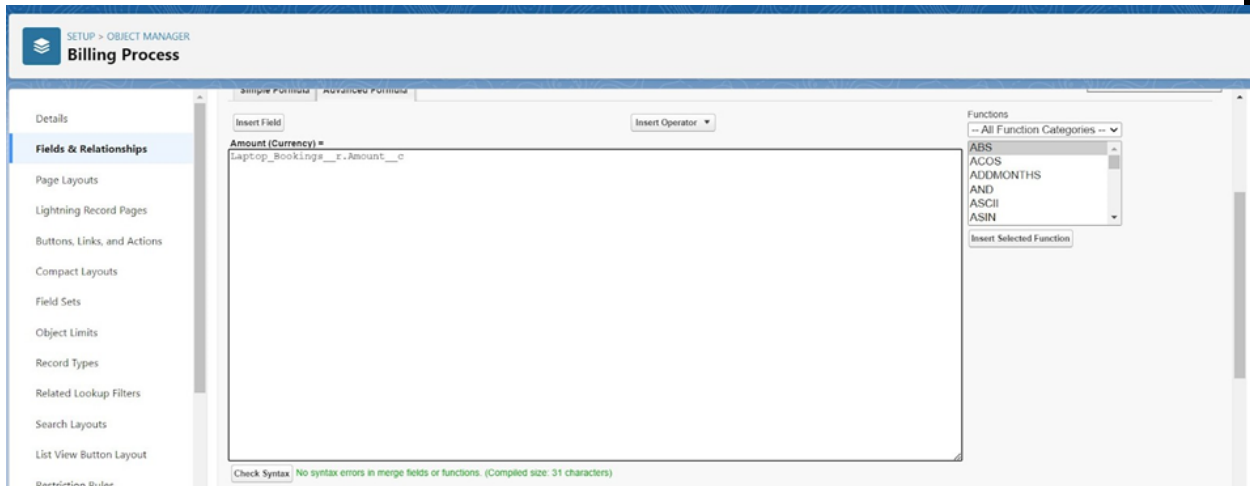
- Go to setup >> click on Object Manager >> type object name(Billing Process) in the search bar >> click on the object.
- Now click on “Fields& Relationships” >>New
- Select Data Type as a “Picklist”
- Fill the Above as following:
 - Field Label: PaymentMode
 - Value >> Select enter values with each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

- iii. Select required
- iv. Click on Next >> Next >> Save and new.

Create a Cross object formulaField in billingprocess Object

1. Go to setup >> click on Object Manager >> type object name(Billing Process) in the search bar >> click on the object.
2. Now click on "Fields & Relationships" >>New
3. Select Data Type as a "Formula"
4. Click on Next
5. Enter the Field label: Amount, the Field name gets auto generated and click on Next.(Formula return type Number).
6. In the Advanced FormulaClick on the Insert fieldin the popup Screen Select the Billing Process and in the second drop down select the Laptop Booking and in the three drop down select the Amount field and click on Insert
7. " Laptop_Booking__r.Amount__c ".





8. Click on the Check syntax: No syntax errors in merge fields

Creating the field in Total Laptopsobject

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: Laptops Available

Field Name: Laptops_Available

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

Formula Return Type

☐ None Selected

☐ Checkbox

☐ Currency

☐ Date

☐ DateTime

☒ Number

☐ Percent

☐ Text

☐ Time

Options

Select one of the data types below:

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

Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: `GrossMargin = Amount - Cost__c`

Calculate a date, for example, by adding or subtracting days to other dates.
Example: `ReminderDate = CloseDate - 7`

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

Calculate a numeric value.
Example: `Fahrenheit = 1.8 * Celsius__c + 32`

Calculate a percent and automatically add the percent sign to the number.
Example: `Discount = (Amount - Discounted_Amount__c) / Amount`

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

Calculate a time, for example, by adding a number of hours to another time.
Example: `Next = TIMEVALUE(NOW()) + 1`

Decimal Places: 0 Example: 999

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

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.

Improve the quality of your data using validation rules. Validation rules verify that the data a user enters in a record meets the standards you specify before the user can save the record. A validation rule can contain a formula or expression that

evaluates the data in one or more fields and returns a value of “True” or “False”. Validation rules also include an error message to display to the user when the rule returns a value of “True” due to an invalid value.

Creating the validation rule for phone number field in consumer object

1. Go to the setup page - click on object manager- From drop down click edit for consumer object.
2. Click on the validation rule - click New.

3. Enter the Rule name as "Phonenumberoremailblankrule".
4. Enter the description as "phone number and email number should not be blank".
5. Enter the formula as "OR(ISBLANK(phone_number__c) , ISBLANK(email__c))" and check the syntax.
6. Save the validation rule

SETUP > OBJECT MANAGER
consumer

Details

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Restriction Rules

Display an error if Discount is more than 30%.

If this formula expression is **true**, display the text defined in the Error Message area

Insert Field Insert Operator

OR(ISBLANK(phone_number__c) , ISBLANK(email__c))

Check Syntax No errors found

Functions

-- All Function Categories --

ABS

ACOS

ADDMONTHS

AND

ASCII

ASIN

Insert Selected Function

ABS(number)

Returns the absolute value of a number, a number without its sign

Help on this function

Error Message

Example: Discount percent cannot exceed 30%

This message will appear when Error Condition formula is **true**

Error Message Please fill the phone number and email

This error message can either appear at the top of the page or below a specific field on the page

Error Location ☒ Top of Page ☐ Field

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,

Pagelayouts, 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

1. Standard profiles:

By default salesforce provides below standard profiles.

- a. Contract Manager
- b. Read Only
- c. Marketing User
- d. Solutions Manager
- e. Standard User
- f. 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.

2. 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:

1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Standard User) >> enter profile name (owner) >> Save.
2. Scroll down to Custom Object Permissions and Give access permissions for Total Laptops, consumers, Laptop Booking and Billing Process objects as mentioned in the below diagram.
3. Give access and save

The screenshot displays the Salesforce Setup interface for the 'Profiles' section. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar is present at the top right. The left sidebar shows 'Users' and 'Profiles' under the 'Setup' menu. The main content area shows the 'Owner' profile details, including its name, user license, description, and creation/modification dates. Below this, the 'Page Layouts' section lists various layouts for different objects. The 'Custom Object Permissions' section is highlighted with a blue arrow, showing a table of permissions for 'Billing Process' and 'consumers'. The 'Session Settings' section shows 'Session Times Out After' set to '2 hours of inactivity' and 'Session Security Level Required at Login' set to '--None--'. The 'Password Policies' section is also visible at the bottom.

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"/>

Agent Profile

1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Standard Platform User) >> enter profile name (Agent) >> Save.
2. While still on the profile page, then click Edit.
3. Scroll down to Custom Object Permissions and Give access permissions for Total Laptops, consumer, Laptop Bookings and Billing Process objects as mentioned in the below diagram.
4. Give access and save

Users

Profiles

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

SETUP

Profiles

Profile Agent

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.

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.

[Login IP Ranges](#) | [Enabled Apex Class Access](#) | [Enabled Visualforce Page Access](#) | [Enabled External Data Source Access](#) | [Enabled Named Credential Access](#) | [Enabled External Credential Principal Access](#) | [Enabled Custom Metadata Type Access](#) | [Enabled Custom Setting Definitions Access](#) | [Enabled Flow Access](#) | [Enabled Service Presence Status Access](#) | [Enabled Custom Permissions](#)

Profile Detail

Name

Agent

User License

Salesforce Platform

Description

Created By

Buvan Chandra Kumar Singh Chowhan 18/11/2024, 11:25 am

Modified By

Buvan Chandra Kumar Singh Chowhan 18/11/2024, 11:25 am

Page Layouts

Standard Object Layouts

Global	Global Layout [View Assignment]	Fulfillment Order Item Tax	Fulfillment Order Item Tax Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Fulfillment Order Product	Fulfillment Order Product Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Idea	Varies by Record Type [View Assignment]
Account	Account Layout [View Assignment]	Individual	Individual Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Invoice	Invoice Layout [View Assignment]

SETUP

Profiles

Contact Point Consents

☒ ☒ ☒ ☒ ☐ ☐

Contact Point Emails

☒ ☒ ☒ ☒ ☐ ☐

Outgoing Channels

☒ ☒ ☒ ☒ ☐ ☐

User External Credentials

☐ ☐ ☐ ☐ ☐ ☐

Custom Object Permissions

	Basic Access				Data Administration			Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All		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"/>	Laptop Bookings	<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"/>	Total Laptops	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Session Settings

Session Times Out After

2 hours of inactivity

Session Security Level Required at Login

--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

15 minutes

Roles and Hierarchy

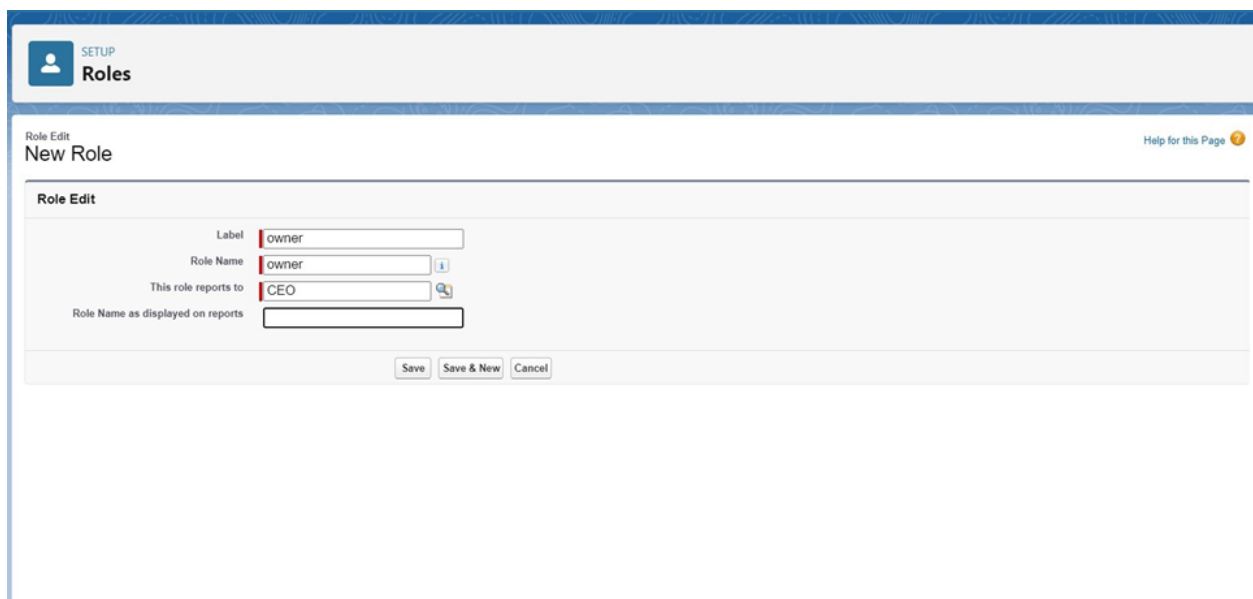
A role in Salesforce defines a user's visibility access at the record level. Roles may be used to specify the types of access that people in your Salesforce organization can have to data.

Simply put, it describes what a user could see within the Salesforce organization.

Creating ownerRole

Creating owner Role:

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

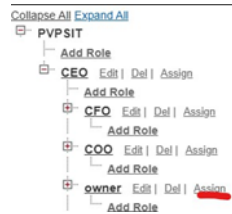


The screenshot shows a web interface for setting up roles. At the top, there's a header with a user icon, the word 'SETUP', and 'Roles'. Below this, the main content area is titled 'Role Edit' and 'New Role'. On the right side of the 'New Role' header, there is a 'Help for this Page' link with a question mark icon. The 'Role Edit' section contains four input fields: 'Label' with the value 'owner', 'Role Name' with the value 'owner' and an information icon, 'This role reports to' with the value 'CEO' and a search icon, and 'Role Name as displayed on reports' which is empty. At the bottom of the form, there are three buttons: 'Save', 'Save & New', and 'Cancel'.

Creating agentRole

Creating owner Role:

1. Go to quick find >> Search for Roles >> click on set up roles.
2. Click on Expand All and click on add role under whom this role works.
3. Give Label as “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

Creating Owner User

- a. Go to setup - type users in quick find box - select users - click New user.
- b. Fill in the fields
- c. First Name : vicky
- d. Last Name : shah
- e. Alias : Give a Alias Name
- f. Email id : Give your Personal Email id
- g. Username : Username should be in this form: text@text.text
- h. Nick Name : Give a Nickname
- i. Role : owner
- j. User license : Salesforce

- k. Profiles : owner.

Creating Agent User

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 : sharma
5. Alias : Give a Alias Name
6. Email id : Give your PersonalEmail 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 : standardplatform user.

SETUP
Users

User

Vicky Shah

[User Profile Help for this Page](#)

[Permission Set Assignments](#) |
 [Permission Set Assignments: Activation Required](#) |
 [Permission Set Group Assignments](#) |
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 [Personal Groups](#) |
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 [User Provisioning Accounts](#)

User Detail

[Edit](#)
[Sharing](#)
[Reset Password](#)
[Freeze](#)
[View Summary](#)

Name	Vicky Shah	Role	owner
Alias	vicky	User License	Salesforce
Email	buvasingh05@gmail.com [Verify]	Profile	Standard User
Username	buvasingh05@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	vickys	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	[i]
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> [i]
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> [i]
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/> [i]

SETUP
Users

User
Ram Sharma

Permission Set Assignments (0) | Permission Set Assignments: Activation Required (0) | Permission Set Group Assignments (0) | Permission Set License Assignments (0) | Personal Groups (0) | Public Group Membership (0) | Queue Membership (0) | Team (0) | Managers in the Role Hierarchy (1) | OAuth Apps (0) | Third-Party Account Links (0) | Installed Mobile Apps (0) | Authentication Settings for External Systems (0) | Login History (0) | User Provisioning Accounts (0)

User Detail

Edit | Sharing | Reset Password | Freeze | View Summary

Name	Ram Sharma	Role	Agent
Alias	rshar	User License	Salesforce Platform
Email	buvansingh05@gmail.com [Verify]	Profile	Standard Platform User
Username	buvansingh05@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	rsharma	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>

Flows

In Salesforce, a flow is a powerful tool that allows you to automate business processes, collect and update data, and guide users through a series of screens or steps. Flows are built using a visual interface and can be created without any coding knowledge.

In Salesforce, "flows" typically refer to Salesforce Flow, which is a powerful automation tool that allows you to create custom, automated processes in your Salesforce org without writing code. Salesforce Flow is a point-and-click tool that enables you to design and automate complex business processes, collect data, and interact with users in a visual interface.

There are different types of flows in Salesforce, including:

Screen Flows: These are used to guide users through a series of screens to collect or display information. Screen Flows are often used for data entry and updates.

Autolaunched Flows: These are flows that are triggered by events, such as when a record is created or updated. They don't require user interaction and can be used for background automation.

Flow Builder: Flow Builder is the visual interface used to create flows. It allows you to design flows by adding elements, like screens, logic, and actions, using a drag-and-drop approach.

Flow Templates: Salesforce provides a library of pre-built flow templates that you can use as a starting point for your own flows. These templates cover a variety of use cases, from simple to complex.

Scheduled Flows: These are flows that you can schedule to run at specific times or intervals. They are often used for automating recurring tasks.

Flow Elements: Flow Builder offers various elements that you can use to create flows,

such as variables, decisions, loops, and more. These elements allow you to build sophisticated logic into your flows.

Subflows: Subflows are reusable flow elements that you can incorporate into multiple flows, making it easier to manage and maintain complex processes. **Record-**

Triggered Flows: These are flows that are triggered when records meet specified criteria. They are often used for automating record updates and related actions.

Why do we need to create a flow:

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

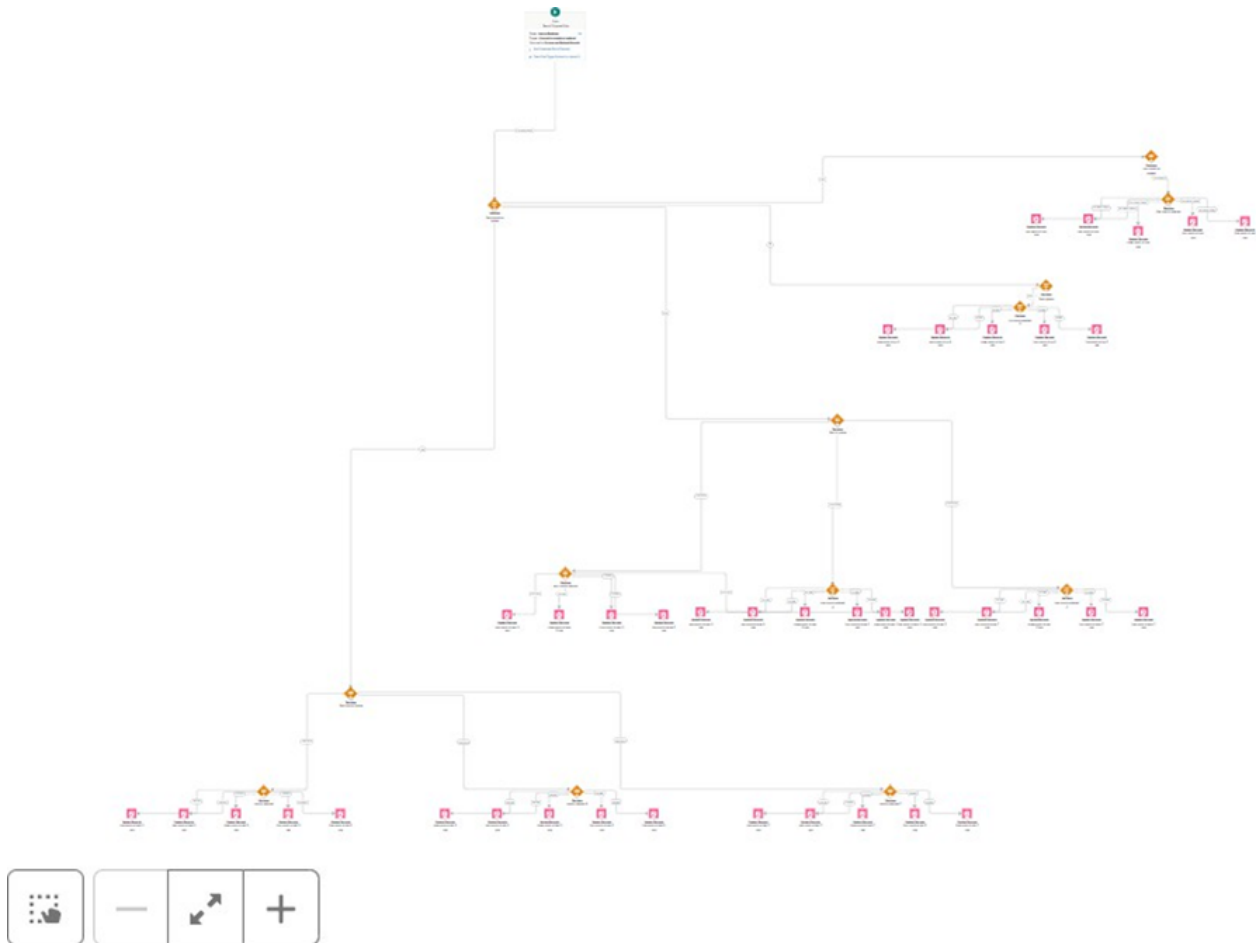
Create a Flow on dell laptop

1. Go to Setup and type "Flow" in the Quick Find box.
2. Select "Flow" and click "New Flow".
3. Choose "Record-Triggered Flow" and click "Create".
4. Select "Laptop Booking" from the object dropdown.
5. Set the trigger as "A record is Created or Updated".
6. Optimize the flow for "Actions and Related Records".
7. Click "+" under the flow canvas and select "Decision".
8. Set the label to "Update" (API name auto-generates).
9. Add outcomes for Dell, Acer, HP, and Mac.
10. After the laptop model decision, add another decision for core type (i3, i5, i7).
11. Define conditions for core types (e.g., "core type equals i3").
12. Add outcomes for Dell core types (i3, i5, i7).
13. After core type decision, add another decision for months (1-5).
14. Set conditions for months (e.g., "how many months equals 1").
15. Add outcomes for months selected (1, 2, 3, 4, 5).
16. Add an "Update Record" action based on month selection.
17. Set Amount__c values for Dell i3 (1000, 2000, etc.).

18.Repeat the process for Dell i5 and i7 with corresponding amounts. 19. Connect outcomes to the appropriate update record actions.

1. Save and activate the flow.

****Similarly we did for remaining laptops
also** Final Flow:**



Apex

CreatingClasses :

Apex classes are modeled on their counterparts in Java. You'll define, instantiate, and extend

classes, and you'll work with interfaces, Apex class versions, properties, and other related class concepts.

- a. **Class:** As in Java, you can create classes in Apex. A class is a template or blueprint

from which objects are created. An object is an instance of a class.

- b. **Object:** Object is an instance of a class, where it can access all the properties that are present in a class i.e., variables and methods. Steps to create a class in APEX:

1. Login to the trailhead account and navigate to the gear account in the top right corner.
2. Then we can see the Developer console. Click on the developer console and you will navigate to a new console window.
3. Then you can see many tools in the Toolbar of the new console window. Click on File, New and Apex Class.
4. Enter the name of the class to create a new class.

Apex Trigger code:

```
trigger LaptopBooking on Laptop_Bookings__c (After insert, after update) { if(trigger.isAfter && (
    trigger.isInsert || trigger.isupdate))
{
```

```
    LaptopBookingHandler.sendEmailNotification(trigger.new);
}
}
```

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

Apex Class

```
public class LaptopBookingHandler {
    public static void sendEmailNotification (List<Laptop_Bookings__c> lapList){
        for(Laptop_Bookings__c lap:lapList)
        {
            Messaging.SingleEmailMessage email = new
Messaging.SingleEmailMessage();
            email.setToAddresses( new List<String>{lap.Email_c}); email.setSubject('Welcome to
```

```

        our company');
        string body = 'Dear ' +lap.Name+', \n';

        body += 'Welcome to Laptop Rentals!You have been seen as a valuable customer to
us.\n Pleasecontinue your journeywith us, whilewe try to provide you withgood quality
resources. \n Laptop Amount= ' + lap.Amount__c + ' \n core type
= '+lap.Processors__c +' \n Laptop type = '+lap.Laptop_names__c; email.setPlainTextBody(body);
        Messaging.sendEmail(new List<Messaging.SingleEmailMessage>{email});
    }
}
}

```

1. Class name:-LaptopBookingHandler
2. API Name:- Laptop_Bookings__c(as per your org go to laptop bookingobject and copy from that).
3. core__c (as per your org go to laptop bookingobject and copy from that).
- 4.Laptop_type__c.(as per your org go to laptop bookingobject and copy from that). In this project , trigger is called whenever the particular record's sum exceeds the threshold i.e minimum business requirement value. Then the code in the trigger will get executed.

Reports

Reportsgive you accessto your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics.

In Salesforce.com we can easilygenerate reports in different styles.And can create reports in a very short time and also schedule the reports. Salesforce provides a powerful suit of analytic tools to help you organize, view and analyze your data.

Types of Reports in Salesforce :

1. **Tabula Reports:**Simple listing of data without any subtotals. This type of reports provide you most basicallyto look at your data. Use tabularreports when you want a simple list or a list of items with a grand total.

Example: This type of reportsare used to list all accounts, List of contacts,List of opportunities.....etc.....

2. **Summary Reports:** This type of reports providea listing of data with groupings

and sub totals. Use summary reports when you want subtotals based on the value of a particular field or when you want to create a hierarchically grouped report, such as sales organized by year and then by quarter.

Example: All opportunities for your team sub totaled by Sales Stage and Owner.

3. **Matrix Reports:** This type of reports allow you to group records both by row and by column. A comparison of related totals, with totals by both row and column. Use matrix reports when you want to see data by two different dimensions that aren't related, such as date and product.

Example: Summarize opportunities by month vertically and by account horizontally.

4. **Joined Reports:** Blocks of related information in a single report. This type of reports enable you to adopt five different blocks to display different types of related data. Each block can own unique columns, summary fields, formulas, filters and sort order. Use joined reports to group and show data from multiple report types in different views.

Example: You can build a report to show opportunity, case and activity data for your accounts.

Create Report

- a. Go to the app -click on the reports tab
- b. Click New Report.
- c. 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.
- d. Customize your report
- e. Add fields from left pane as shown below
- f. Click the column drop down and select bucket list.
- g. Follow the picture and save or run it.

Report: consumer with Laptop Bookings and Total Laptops consumer with laptops and total laptops						
<div> <div>Enable Field Editing</div> <div>Q</div> <div>Add Chart</div> <div></div> <div></div> <div>Edit</div> <div></div> </div>						
Total Records 1	Total Amount ₹3,400					
<input type="checkbox"/> types of versions ↑	consumer: consumer_name	Laptop Bookings: Laptop Bookings	Total No Of Laptops: Total Laptops ↑	Laptop names	core type	Amount
<input type="checkbox"/> high (1)	Neehanika	Others	2	Hp	Core i5	₹3,400
Subtotal						₹3,400
Total (1)						₹3,400

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

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



Dashboard

data analytics of laptop

total amount of data in dashboards

As of 20-Nov-2024, 4:43 pm · Viewing as Shree Harsha Gedela

consumer with laptops and total laptops



Sum of Amount

types of versions

high ●



[View Report \(consumer with laptops and total laptops\)](#)