

A CRM APPLICATION FOR LAPTOP RENTALS

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Abstract

The CRM Application for Laptop Rentals streamlines the rental process by efficiently delivering laptops to customers. It enhances customer engagement using advanced CRM strategies to improve experiences and optimize operations. A standout feature is personalized email communication with potential customers, fostering effective outreach. This solution ensures convenience, satisfaction, and operational excellence in the laptop rental industry.

Introduction

In the digital age, laptops have become essential tools for individuals and businesses. However, purchasing a laptop is not always feasible for everyone. The Laptop Rental System bridges this gap by providing a platform where users can rent laptops based on their requirements. Salesforce, being a leading cloud-based platform, offers the scalability, security, and customization needed for such an application.

Objectives

1. To develop a user-friendly platform for laptop rentals.
2. To enable efficient inventory and order management.
3. To integrate customer relationship management for better user engagement.
4. To provide real-time analytics and reports for business insights.
5. To ensure secure transactions and data handling.

Scope

The Laptop Rental System is designed to:

- Serve individual customers, small businesses, and corporate clients.
- Manage a wide range of laptop brands and configurations.

- Handle real-time availability and pricing updates.
- Support multiple payment gateways and rental plans.

Technologies Used

- **Salesforce:** Core platform for development.
- **Apex:** Custom logic and triggers.
- **Lightning Web Components (LWC):** Frontend components.
- **Salesforce Flow:** Automation of business processes.
- **Third-party APIs:** For payment and shipping integrations.

Object Creation

1) Create Total Laptops Object

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

Enter the label name>> Total Laptops

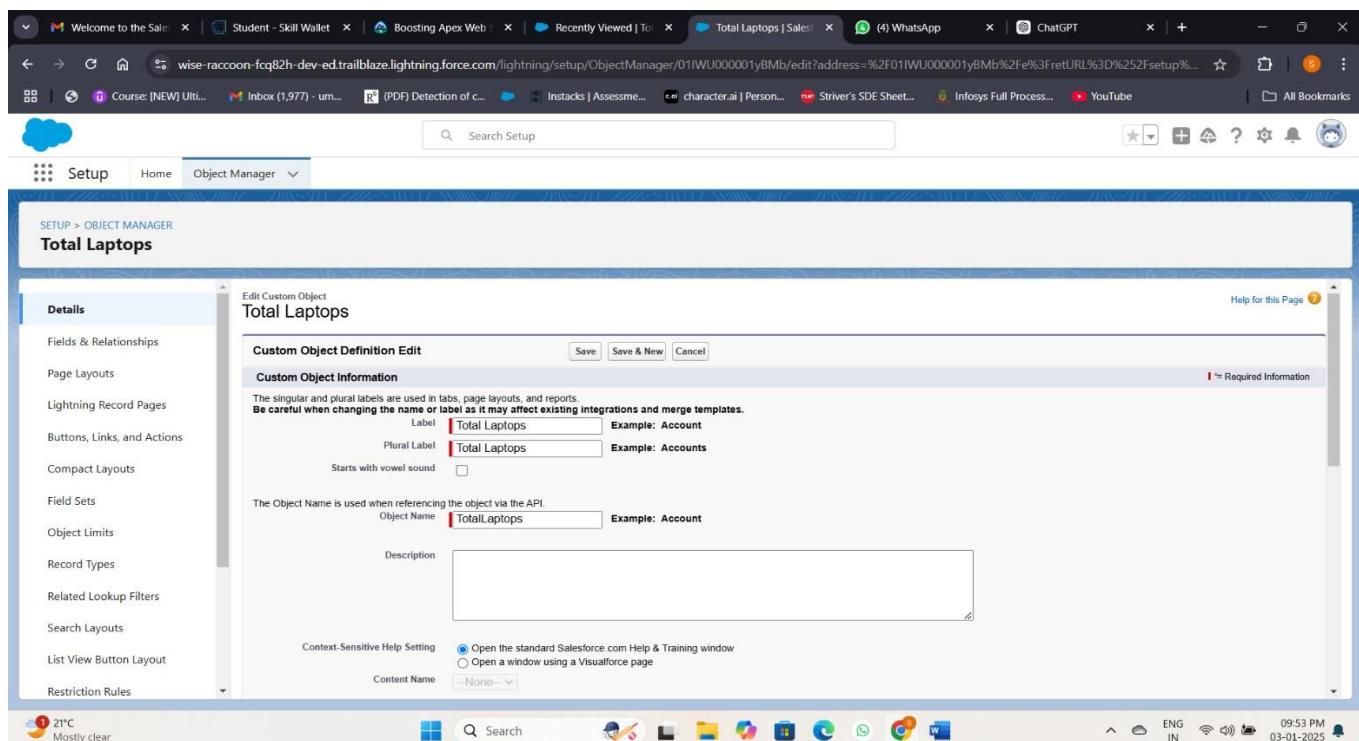
Plural label name>> Total Laptops

Enter Record Name Label and Format

Record Name >>Total Laptops

Data Type >> Text

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



The screenshot shows the Salesforce Setup interface. The URL in the browser is wise-raccoon-fcq82h-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01WL000001yBMB/view. The page title is "Total Laptops". The left sidebar lists various setup categories like Fields & Relationships, Page Layouts, Lightning Record Pages, etc. The main content area shows the "Details" tab for the "Total Laptops" object. It includes fields for Description, API Name (TotalLaptops__c), Singular Label (Total Laptops), Plural Label (Total Laptops), and several checkboxes for reports, activities, field history, deployment status, and help settings. At the bottom, there are system status icons and a system tray showing the date and time.

2) 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.

The screenshot shows the Salesforce Setup interface. The user is navigating through the Object Manager to create a new custom object. The left sidebar lists various setup categories like Fields & Relationships, Page Layouts, and Record Types. The main panel displays the 'Custom Object Definition Edit' screen for the 'consumer' object. It includes fields for Label (set to 'CONSUMER'), Plural Label (set to 'consumers'), Object Name (set to 'Consumer'), and Description. A note at the top warns about changing the name or label affecting existing integrations and merge templates. The status bar at the bottom shows system information including weather (21°C Mostly clear) and system time (09:57 PM 03-01-2025).

The screenshot shows the Salesforce Setup interface displaying the details of the 'consumer' object. The left sidebar shows the same setup categories as the previous screenshot. The main panel displays the 'Details' section of the object's configuration. It includes fields for Description (empty), API Name (set to 'consumer__c'), Singular Label (set to 'consumer'), and Plural Label (set to 'consumers'). On the right side, there are checkboxes for enabling Reports, Activities, Field History, Deployment Status, and Help Settings, all of which are checked. The status bar at the bottom shows weather (21°C Mostly clear) and system time (09:58 PM 03-01-2025).

3) 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 Click on Allow reports,Allow

search and Track Field History, Allow search >> Save.

The screenshot shows the 'Object Manager' page for the 'Laptop Bookings' object. On the left, a sidebar lists various configuration options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules. The main area is titled 'Custom Object Definition Edit' for 'Laptop Bookings'. It includes fields for 'Label' (Laptop Bookings), 'Plural Label' (Laptop Bookings), 'Object Name' (Laptop_Bookings), 'Description' (empty), 'Content Name' (None), and 'Context-Sensitive Help Setting' (Open the standard Salesforce.com Help & Training window). A note at the top states: 'The singular and plural labels are used in tabs, page layouts, and reports. Be careful when changing the name or label as it may affect existing integrations and merge templates.' A 'Save' button is visible at the top right.

The screenshot shows the 'Object Manager' page for the 'Laptop Bookings' object, specifically the 'Details' tab. The left sidebar remains the same. The main area displays the 'Details' section, which includes fields for 'Description' (empty), 'API Name' (Laptop_Bookings_c), 'Custom' (checked), 'Singular Label' (Laptop Bookings), 'Plural Label' (Laptop Bookings), 'Enable Reports' (checked), 'Track Activities' (checked), 'Track Field History' (checked), 'Deployment Status' (Deployed), 'Help Settings' (Standard salesforce.com Help Window), and 'Edit' and 'Delete' buttons at the top right. The status bar at the bottom indicates it's 10:00 PM on 03-01-2025.

4. Create Billing Process Object

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

1) Enter the label name >> Billing Process

2) Plural label name >> Billing Process

3) Enter Record Name Label and Format

Record Name >> Billing ProcessName

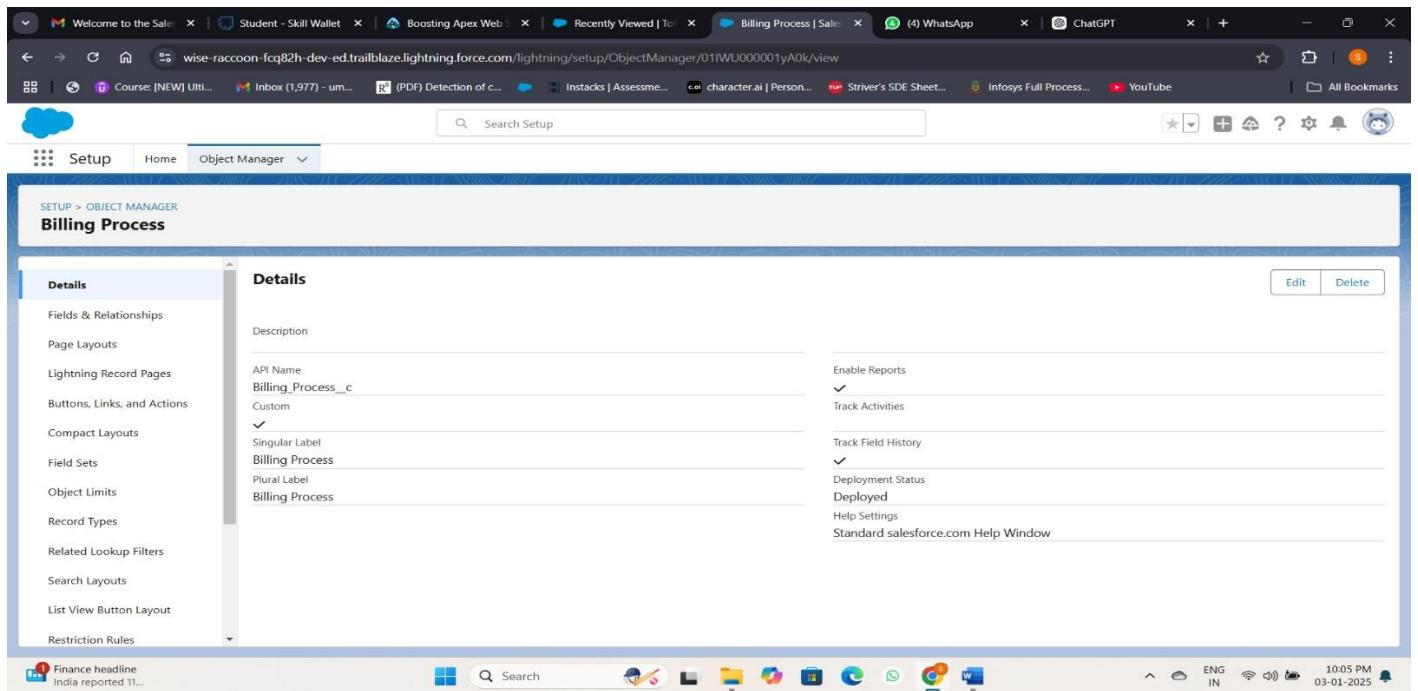
Data Type >> Name Click on Allow reports,Allow

search and Track Field History, Allow search >> Save.

The screenshot shows the Salesforce Setup interface, specifically the Object Manager section. A new object is being created with the following details:

- Label:** Billing Process
- Plural Label:** Billing Process
- Object Name:** Billing_Process
- Description:** (Empty)
- Context-Sensitive Help Setting:** Open the standard Salesforce.com Help & Training window (selected)
- Content Name:** (None)

The left sidebar lists various object configuration options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules.



Tabs

1) 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) Click save.

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. A search bar at the top right contains the text 'Search Setup'. The left sidebar has 'User Interface' expanded, with 'Rename Tabs and Labels' and 'Tabs' selected. The main content area displays a 'Custom Object Tab' titled 'Total Laptops'. Below it, a message says 'Below is the information for the custom tab. Click Edit to change the custom tab.' A 'Custom Tab Definition Detail' table is shown with the following data:

Tab Label	Total Laptops	Edit	Delete
Object	Total Laptops		
Description			
Created By	Sruthi Ummadi, 30/11/2024, 3:47 pm		
Modified By	Sruthi Ummadi, 30/11/2024, 3:47 pm		

On the right, there is a 'Tab Style' section with a 'Laptop' icon and a 'Splash Page Custom Link' button. The bottom right corner of the window shows the date and time: '05-01-2025 07:49 PM'.

Activity 2: Creating Remaining Tabs

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

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. A search bar at the top right contains the text 'Search Setup'. The left sidebar has 'User Interface' expanded, with 'Rename Tabs and Labels' and 'Tabs' selected. The main content area displays a 'Custom Object Tab' titled 'Laptop Bookings'. Below it, a message says 'Below is the information for the custom tab. Click Edit to change the custom tab.' A 'Custom Tab Definition Detail' table is shown with the following data:

Tab Label	Laptop Bookings	Edit	Delete
Object	Laptop Bookings		
Description			
Created By	Sruthi Ummadi, 30/11/2024, 3:49 pm		
Modified By	Sruthi Ummadi, 30/11/2024, 3:49 pm		

On the right, there is a 'Tab Style' section with a 'Laptop' icon and a 'Splash Page Custom Link' button. The bottom right corner of the window shows the date and time: '05-01-2025 07:49 PM'.

Billing Process

Custom Tab Definition Edit

Custom Object Tab Information

Tab Label: Billing Process
Object: Billing Process
Tab Style: Big Top

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.
Splash Page Custom Link: -None-

Description:

Save Cancel

consumer

Custom Tab Definition Detail

Tab Label	consumer	Tab Style	People
Object	consumer	Splash Page Custom Link	-None-
Description		Created By	Sruthi Ummadi
		Modified By	Sruthi Ummadi
		Date	30/11/2024, 3:48 pm

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Action	Label	Tab Style	Description
Edit Del	Billing Process	Big top	
Edit Del	consumer	People	
Edit Del	Equipment Maintenance Items	Factory	
Edit Del	Laptop Bookings	Laptop	
Edit Del	Total Laptops	Laptop	
Edit Del	Vehicles	Car	

Web Tabs

No Web Tabs have been defined

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.
3. Upload a photo that is related to your app.
4. To Add Navigation Items:

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

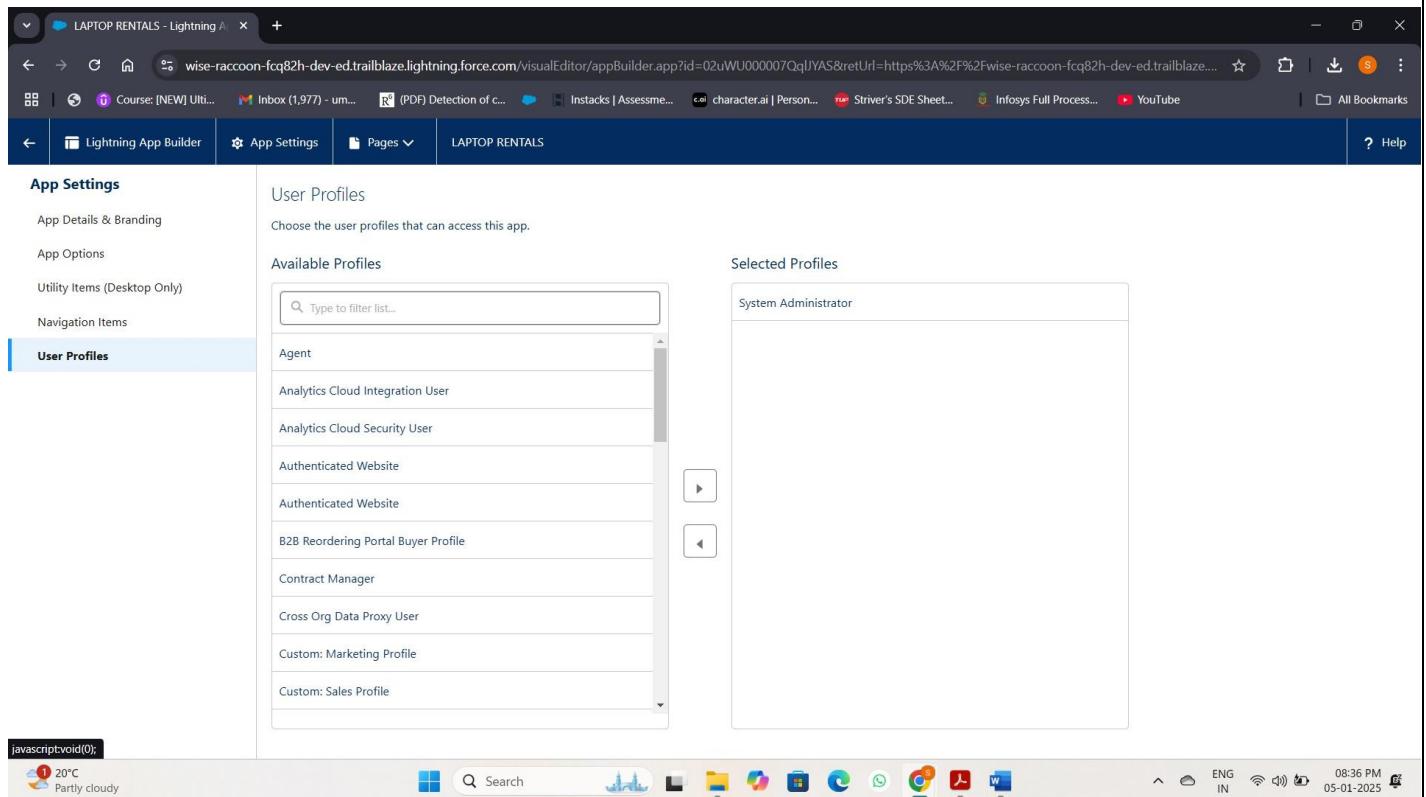
5. To Add User Profiles:

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

The screenshot shows the 'App Details & Branding' section of the Lightning App Builder. On the left, a sidebar lists 'App Settings' with 'App Details & Branding' selected. The main area contains fields for 'App Name' (LAPTOP RENTALS), 'Developer Name' (LAPTOP.RENTALS), and 'Description' (Enter a description...). It also includes a 'App Branding' section with an 'Image' (a laptop icon) and a 'Primary Color Hex Value' (#0070D2). Below these are 'Org Theme Options' and an 'App Launcher Preview' showing the app's icon and name.

The screenshot shows the 'Navigation Items' section of the Lightning App Builder. The sidebar now has 'Navigation Items' selected. The main area displays two lists: 'Available Items' (Accounts, All Sites, Alternative Payment Methods, Analytics, App Launcher, Approval Requests, Asset Action Sources, Asset Actions, Asset State Periods, Assets) and 'Selected Items' (Total Laptops, consumer, Billing Process, Laptop Bookings). Navigation arrows allow items to be moved between these lists.

● Move system administrator from left to right:



Fields

1) 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”
4. Click on next
5. Fill the Above as following:

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

consumer | Salesforce

wise-raccoon-fcq82h-dev-ed.trailblaze.lightning.force.com/lightning/setup/ObjectManager/01IWU000001yBOD/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER consumer

Fields & Relationships
9 items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Text Area(255)		
consumer Status	Field1__c	Picklist		
consumer Status	consumer_Status__c	Picklist		
consumer_name	Name	Text(80)		
Created By	CreatedBy	Lookup(User)		
Email	Email__c	Email		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		
Phone number	Phone_number__c	Phone		

20°C Partly cloudy

Search

ENG IN 08:42 PM 05-01-2025

SETUP > OBJECT MANAGER consumer

Step 2. Enter the details Step 2 of 4

Field Label: phone number

Field Name: phone_number

Description:

Help Text:

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

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

Default Value: Show Formula Editor

Use formula syntax: Enclose text and picklist values in double quotes ("The_Text"), include numbers without quotes (.25), show percentages as decimals (.9.10), and express date calculations in the standard format: (Today() +7). To reference a field from a Custom Metadata type record use <CustomMetadata Type>.Record[FieldName] Field__c

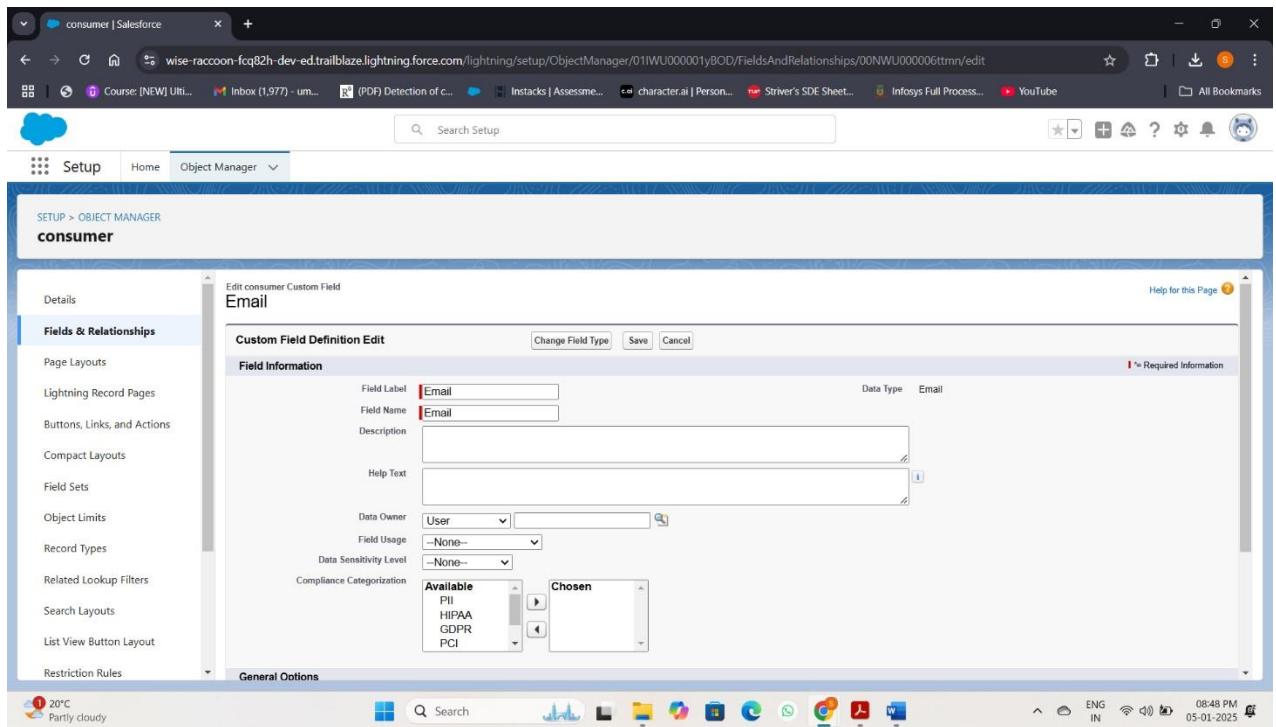
Previous Next Cancel

The screenshot shows the Salesforce Setup interface with the URL wise-raccoon-fcq82h-dev-ed.trailblaze.lightning.force.com/lightning/setup/ObjectManager/01IWU000001yBOD/FieldsAndRelationships/view. The page title is "consumer | Salesforce". The main content area is titled "Fields & Relationships" and lists 9 items, sorted by Field Label. The columns include FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. Fields shown include Address, consumer_Status, consumer_Status__c, consumer_name, Name, Created By, Email, Email__c, Last Modified By, Owner, OwnerId, and Phone number. The "consumer_Status" and "Phone number" fields are indexed.

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.



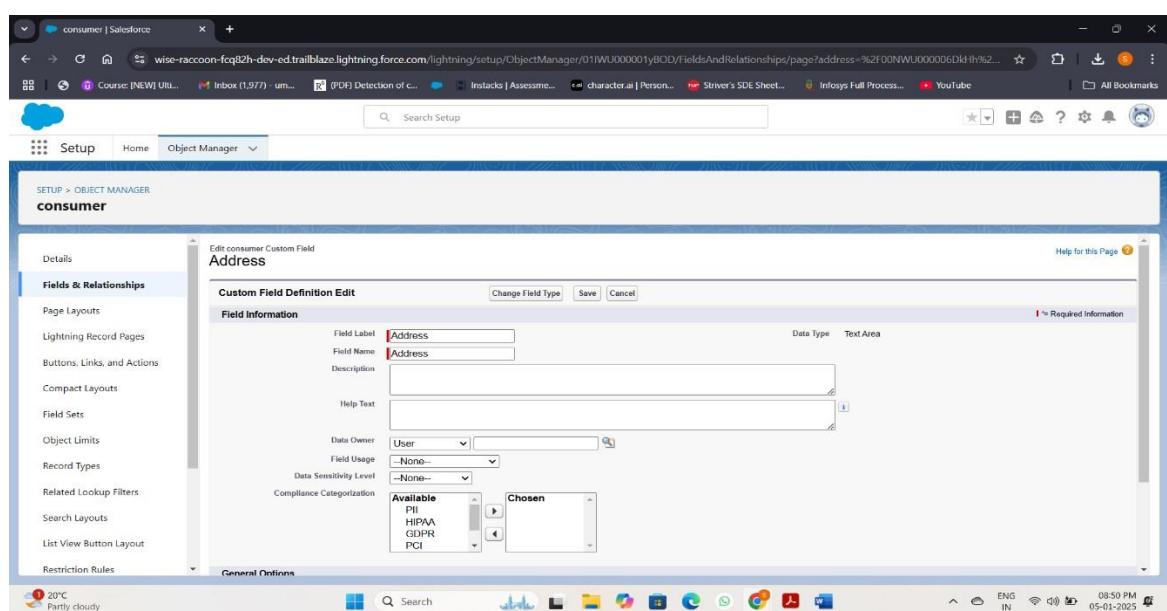
Go to setup >> click on Object Manager >> type object name(consumer) in search bar >> click on the object.

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.

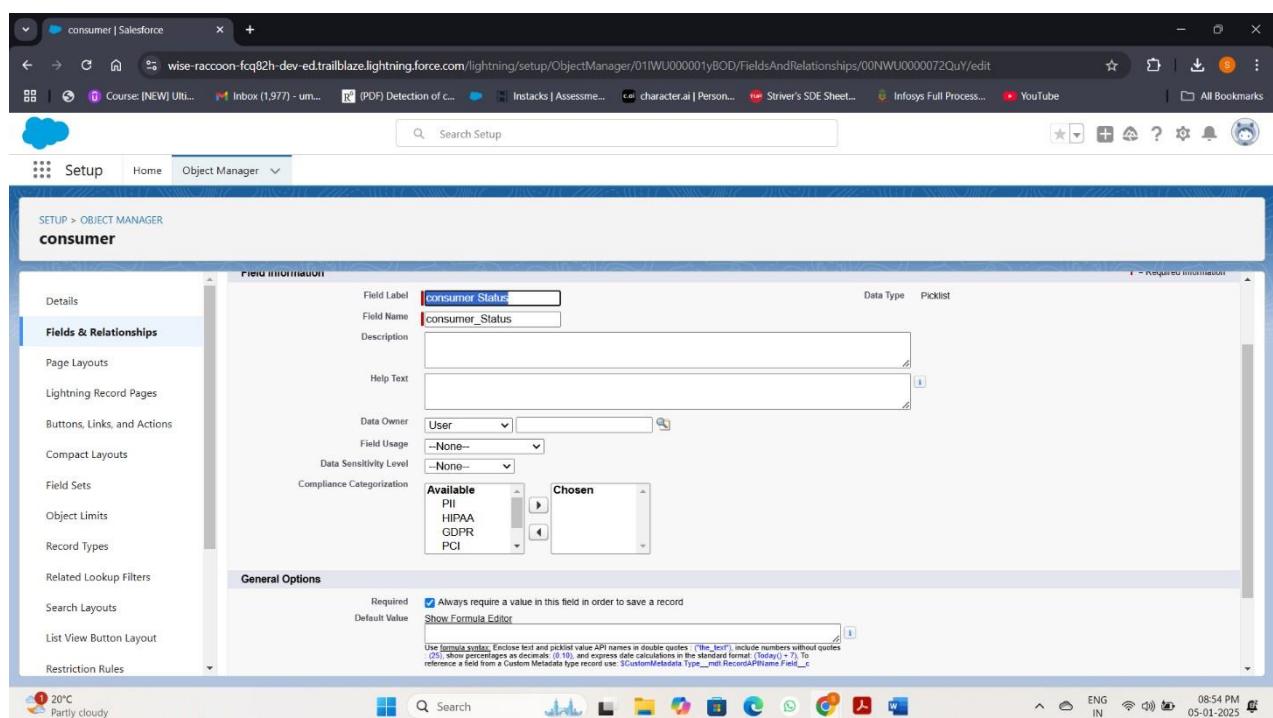


Go to setup >> click on Object Manager >> type object name(consumer) in search bar >> click on the object.

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



FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Text Area(255)		
consumer Status	Field1__c	Picklist		
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		

Creating the field in Laptops Bookings object

1. To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Laptop Booking) in the search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data Type as a “Picklist”
4. Label: Laptop Names
5. Picklist values are:-1.Dell 2. Acer 3.Hp 4.Mac
6. Select required
7. Click on Next >> Next >> Save and new

Laptop Bookings

Fields & Relationships

- Master-Detail Relationship
- External Lookup Relationship
- Checkbox
- Currency
- Date
- Date/Time
- Email
- Geolocation
- Number
- Percent
- Phone
- Picklist (selected)
- Picklist (Multi-Select)
- Text
- Text Area
- Text Area (Long)
- Text Area (Rich)
- Text (Encrypted)

Laptop Bookings

Field Information

Field Label: Laptop Names
Field Name: Laptop_Names
Data Type: Picklist
Description:
Help Text:
Data Owner: User
Field Usage: None
Data Sensitivity Level: None
Compliance Categorization: Available: PII, HIPAA, GDPR, PCI
Chosen: Chosen

General Options

Required: Always require a value in this field in order to save a record
Default Value: Show Formula Editor
Use formula syntax: Enclose text and picklist value API names in double quotes: ("the_text"), include numbers without quotes: (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today) + 7, To reference a field from a Custom Metadata item record use: \$CustomMetadataItemName__mdt.
Available: PII, HIPAA, GDPR, PCI
Chosen: Chosen

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

To create fields & relationship to an object:

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

2. Now click on “Fields & Relationships” >> New
3. Select Data Type as a “Picklist” and Label: Core Type
4. Picklist values are:-1.core i3 2. Core i5 3. Core i7 4.Bionic Chip .
5. Select required.
6. Click on Next >> Next >> Save and new

The screenshot shows the Salesforce Setup interface for creating a new field. The object is 'Laptop Bookings'. The 'Fields & Relationships' tab is selected. On the right, a list of field types is shown, with 'Picklist' selected. A detailed description of the Picklist field type is provided, including its purpose and various options like 'Use global picklist value set' or 'Enter values, with each value separated by a new line'. The 'Next' button is visible at the bottom right.

The screenshot shows the configuration of the 'Core Type' picklist field. The 'Field Label' is 'Core Type'. Under 'Values', the 'Enter values, with each value separated by a new line' option is selected, and the values 'core i3', 'core i5', 'core i7', and 'Bionic Chip' are listed. The 'Field Name' is 'Core_Type'. The 'Required' checkbox is checked. Other settings include 'Display values alphabetically, not in the order entered', 'Use first value as default value', and 'Restrict picklist to the values defined in the value set'. The 'Field Name' is 'Core_Type'. The 'Description' and 'Help Text' fields are empty. The 'Required' checkbox is checked, and the 'Auto add to custom report type' and 'Add this field to existing custom report types that contain this entity' checkboxes are also checked.

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.
5. Click save.

The screenshot shows the 'Edit Field Dependency' page in the Salesforce Setup. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar at the top right contains 'Search Setup'. The main content area has a title 'Edit Field Dependency' and a 'Legend' section with 'Excluded Value' (gray) and 'Included Value' (yellow). Below this is a table with the following data:

Laptop Names:	Dell	Acer	Hp	Mac
Core Type:	core i3 core i5 core i7 Bionic Chip			

Instructions below the table provide tips for using the grid, such as double-clicking to toggle visibility and using SHIFT + click to select adjacent cells. Buttons for 'Save', 'Cancel', and 'Preview' are at the bottom.

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.

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

Data Type

- None Selected Select one of the data types below.
- Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
- Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
- Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
- Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
 - The relationship field is required on all detail records.
 - The ownership and sharing of a detail record are determined by the master record.
 - Users can use the master detail records to filter detail records.
 - You can use roll-up summary fields on the master record to summarize the detail records.
- Master-Detail Relationship The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.
- External Lookup Relationship Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
- Checkbox Allows users to select a True (checked) or False (unchecked) value.
- Currency Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
- Date Allows users to enter a date or pick a date from a popup calendar.
- Date/Time Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
- Email Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
- Geolocation Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
- Number Allows users to enter any number. Leading zeros are removed.

Help for this Page ⓘ

Step 2 of 6

Previous Next Cancel

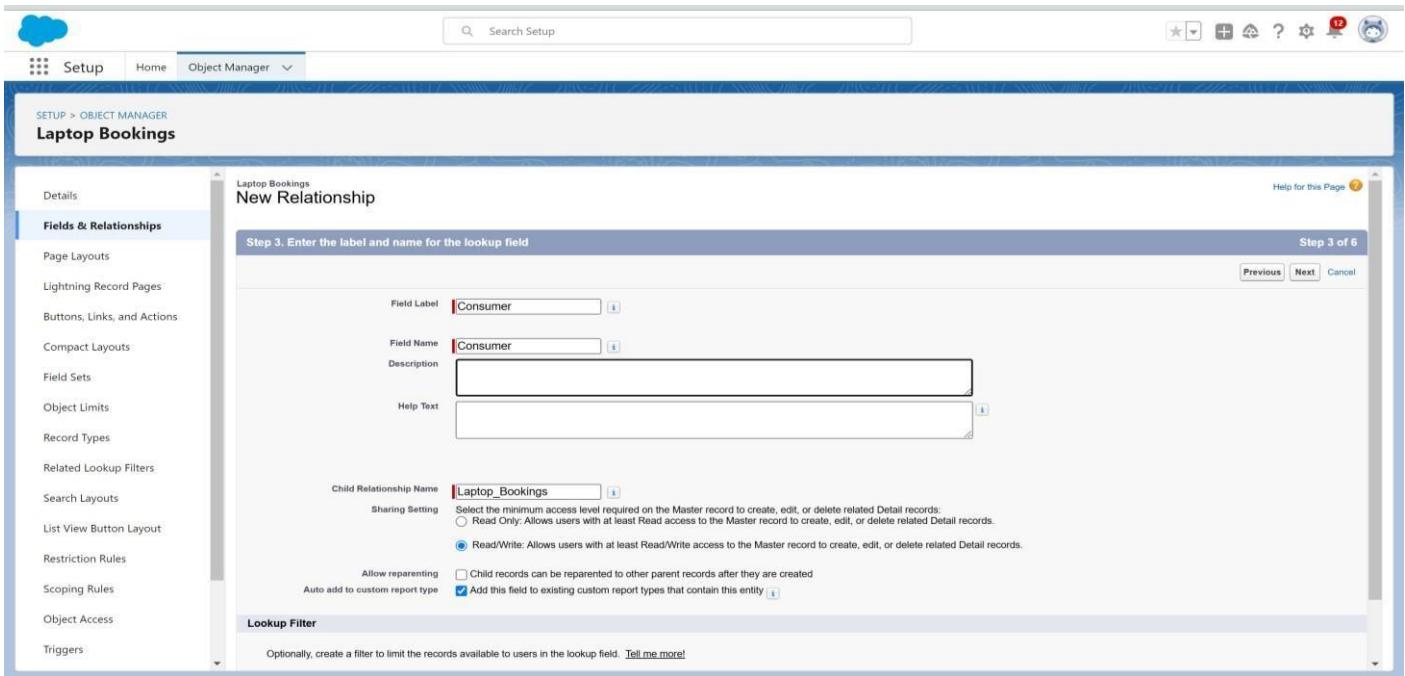
New Relationship

Step 2. Choose the related object

Select the other object to which this object is related.

Related To

Previous Next Cancel



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
6. 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

Laptop Bookings

Fields & Relationships

- Lookup Relationship
- Master-Detail Relationship
- External Lookup Relationship
- Checkbox
- Currency
- Date
- DateTime
- Email
- Geolocation
- Number
- Percent
- Phone
- Picklist
- Picklist (Multi-Select)
- Text
- Text Area
- Text Area (Long)
- Text Area (Rich)

New Custom Field

Step 2. Enter the details

Field Label:

Length: Number of digits to the left of the decimal point

Decimal Places: Number of digits to the right of the decimal point

Field Name:

Description:

Help Text:

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

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

Default Value:

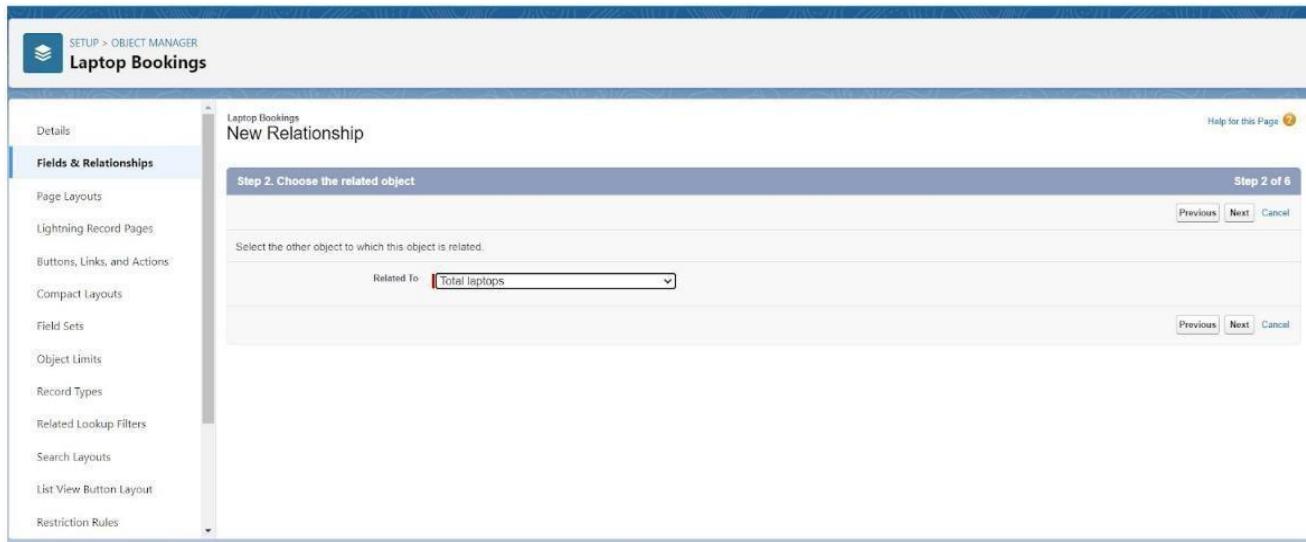
Show Formula Editor

Use formula syntax: Enclose text and picklist value API names in double quotes. ('The_Text'), include numbers without quotes : (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type__mdt.RecordAPIName.Field__c

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 “Master-Detail Relationship”
4. Click on Next
5. Click on the Related to drop down and Select the “Total Laptops” object and click on Next 6. Fill the Above as following:
7. Change the Field Label: Total No Of Laptops

8. Field Name: It's gets auto generated 9. Click on Next >> Next >> Save and new.



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

To create fields & relationship to an object:

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 “Email” 4. Click on Next and save it.

Fields & Relationships				
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	Total_no_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
4. Select Data type as a “Roll-up Summary” and Click on Next

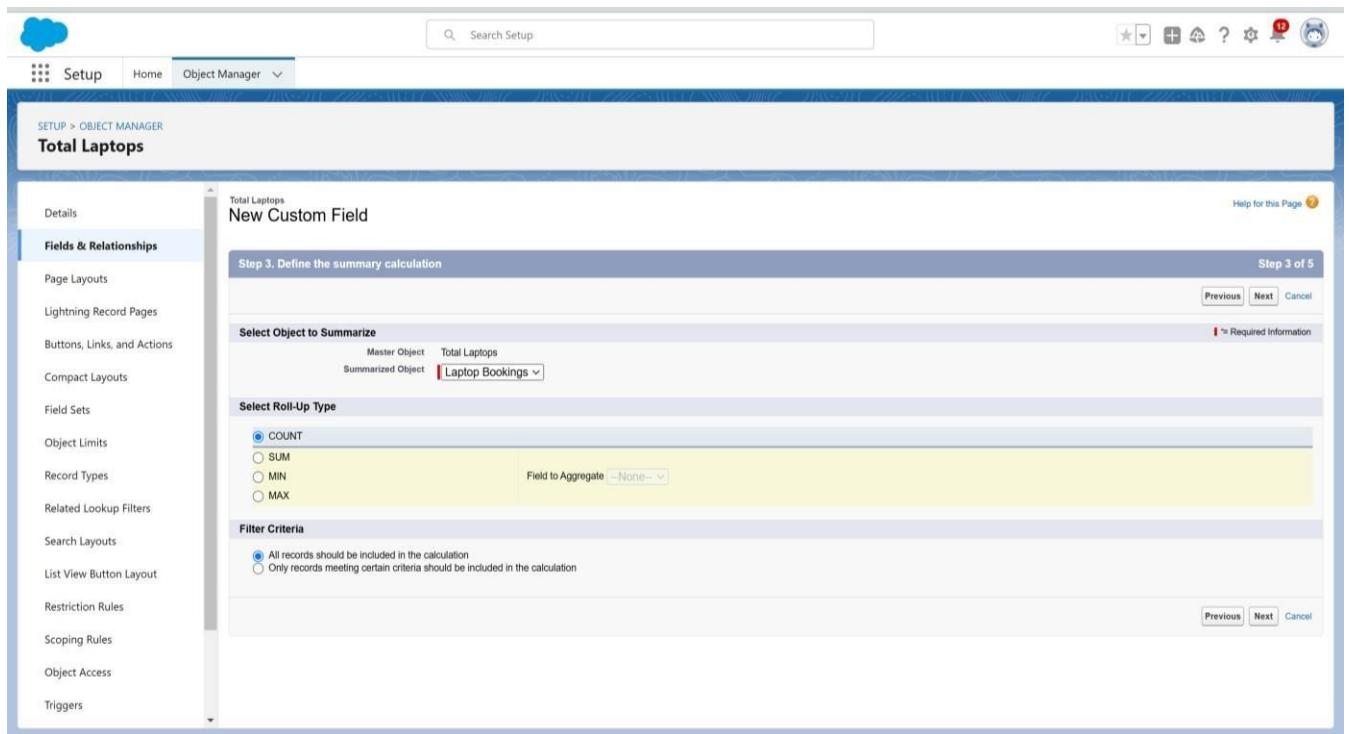
- Fill the Above as following:
- Field Label: Laptops delivered
- Field Name :It's gets auto generated

5. Click on Next

6. Select the Laptop Bookings in the Summarized Object 7. Select the count Radio button in the select Roll-up Type 8. Click>>next >>next>>save.

The screenshot shows the Salesforce Setup interface under 'Object Manager'. A sidebar on the left lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main area is titled 'Total Laptops New Custom Field' and 'Step 1. Choose the field type'. It asks to specify the type of information. Under 'Data Type', the 'Roll-Up Summary' option is selected. Other options shown include None Selected, Auto Number, Formula, Lookup Relationship, Master-Detail Relationship, External Lookup Relationship, Checkbox, and Currency. A note explains that Roll-Up Summary creates a relationship between the object and its summary values. Buttons at the bottom right include 'Next' and 'Cancel'.

The screenshot shows the continuation of the custom field creation process. The sidebar remains the same. The main area is titled 'Step 2. Enter the details' and shows the configuration for the previously selected 'Roll-Up Summary' type. It includes fields for 'Field Label' (Laptops delivered), 'Field Name' (Laptops_Delivered), 'Description' (empty), and 'Help Text' (empty). A checkbox 'Auto add to custom report type' is checked, and another checkbox 'Add this field to existing custom report types that contain this entity' is also checked. Buttons at the bottom right include 'Previous', 'Next', and 'Cancel'.



To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Laptop Booking) in the search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New 3. Select Data type as a “Formula” and Click on Next
4. Fill the Above as following:
 - Field Label: Laptops Available
 - Field Name : It's gets auto generated
 - Select the Formula Return Type as “Number”
 - Select the Decimal places as “0” and Click on Next
 - Click on the Advanced Formula and Enter the value in formula box “ 50 - ” and Click on insert field than you will find a pop window under the Laptop Booking select the Total No Of Laptops in the second Column and select the Laptops delivered in the third column and click on insert
 - “ 50 - Total_no_of_laptops__r.Laptops_delivered__c ” and Check Syntax
 - Click on Next >> Next >> Save and new

Laptop Bookings

New Custom Field

Step 1. Choose the field type

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

Data Type

- None Selected
- Auto Number
- Formula
- Roll-Up Summary

Select one of the data types below.

Lookup Relationship

- Master-Detail Relationship
- External Lookup Relationship

A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Checkbox

Currency

Allows users to select a True (checked) or False (unchecked) value.

Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Step 2. Choose output type

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
- Date/Time
- Number
- Percent
- Text
- Time
- Options

Select one of the data types below.

Number

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

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

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

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

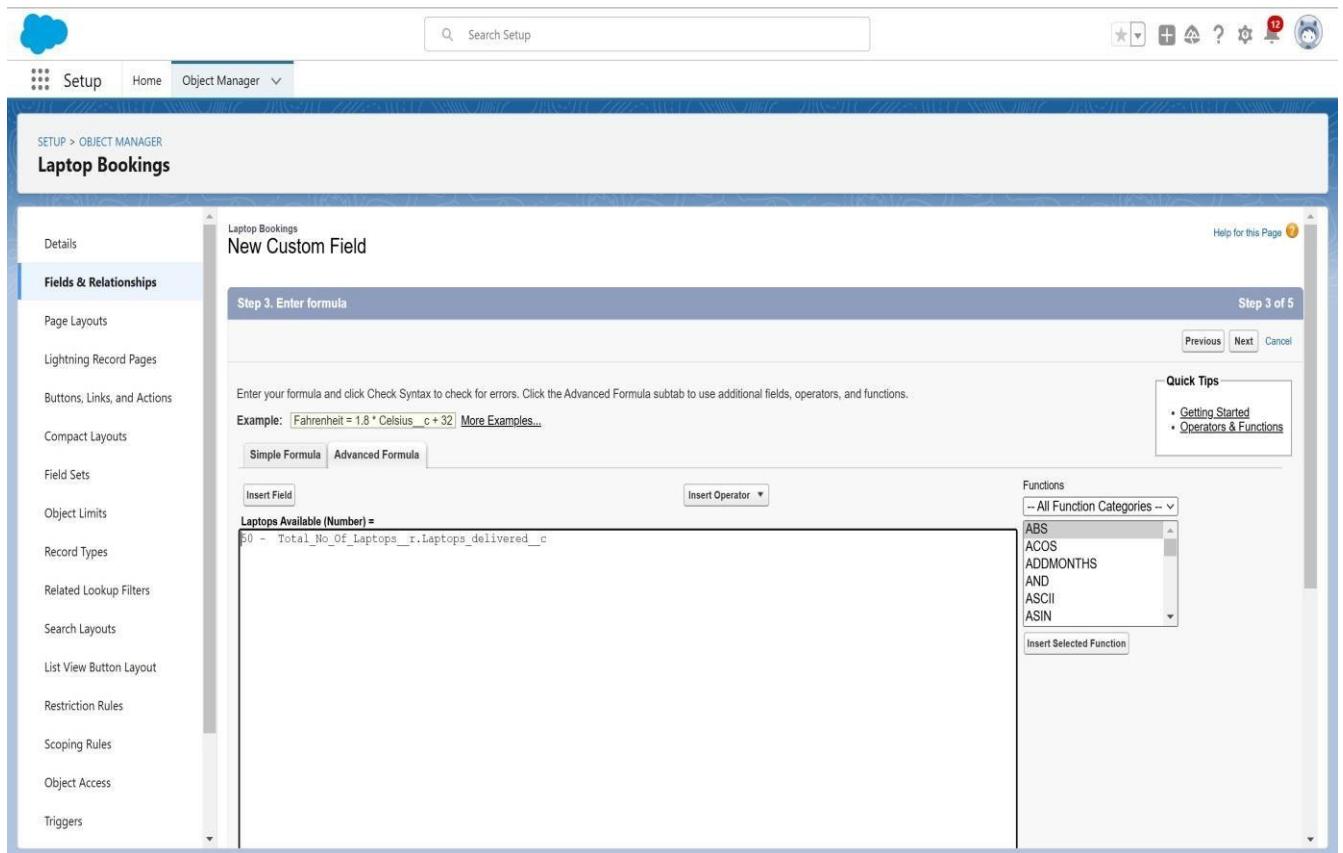
Calculate a numeric value
Example: `Fahrenheit = 1.8 * Celsius_c + 32`

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: `Full Name = 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**



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 “picklist” and Label: how many months 5. Picklist values are 1.2.3.4.5 6. Click and save it.

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

Scoping Rules

Object Access

Triggers

External Lookup Relationship

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Checkbox

Allows users to select a True (checked) or False (unchecked) value.

Currency

Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Date

Allows users to enter a date or pick a date from a popup calendar.

Date/Time

Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.

Email

Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

Geolocation

Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

Number

Allows users to enter any number. Leading zeros are removed.

Percent

Allows users to enter a percentage number, for example, "10" and automatically adds the percent sign to the number.

Phone

Allows users to enter any phone number. Automatically formats it as a phone number.

Picklist

Allows users to select a value from a list you define.

Picklist (Multi-Select)

Allows users to select multiple values from a list you define.

Text

Allows users to enter any combination of letters and numbers.

Text Area

Allows users to enter up to 255 characters on separate lines.

Text Area (Long)

Allows users to enter up to 131,072 characters on separate lines.

Text Area (Rich)

Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

Text (Encrypted) i

Allows users to enter any combination of letters and numbers and store them in encrypted form.

Time

Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50.600" are all valid times for this field.

URL

Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

Next Cancel

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

Scoping Rules

Object Access

Triggers

Step 2. Enter the details Step 2 of 4

Field Label i

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

1
2
3
4
5

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

Field Name i

Description

Help Text

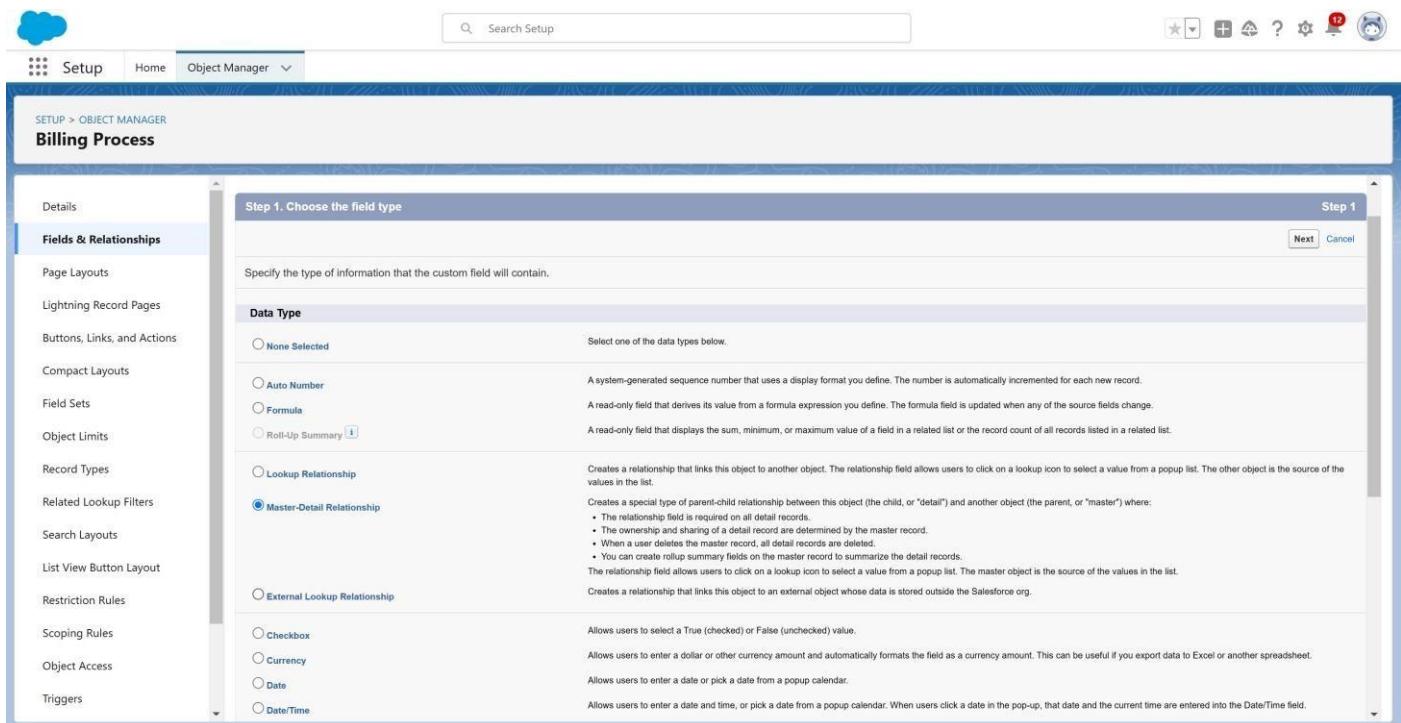
Required Always require a value in this field in order to save a record
Auto add to custom report type Add this field to existing custom report types that contain this entity i

Previous Next Cancel

Creation of Fields & Relationship for Billing Process Object

1. To create fields & relationship to an object:

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



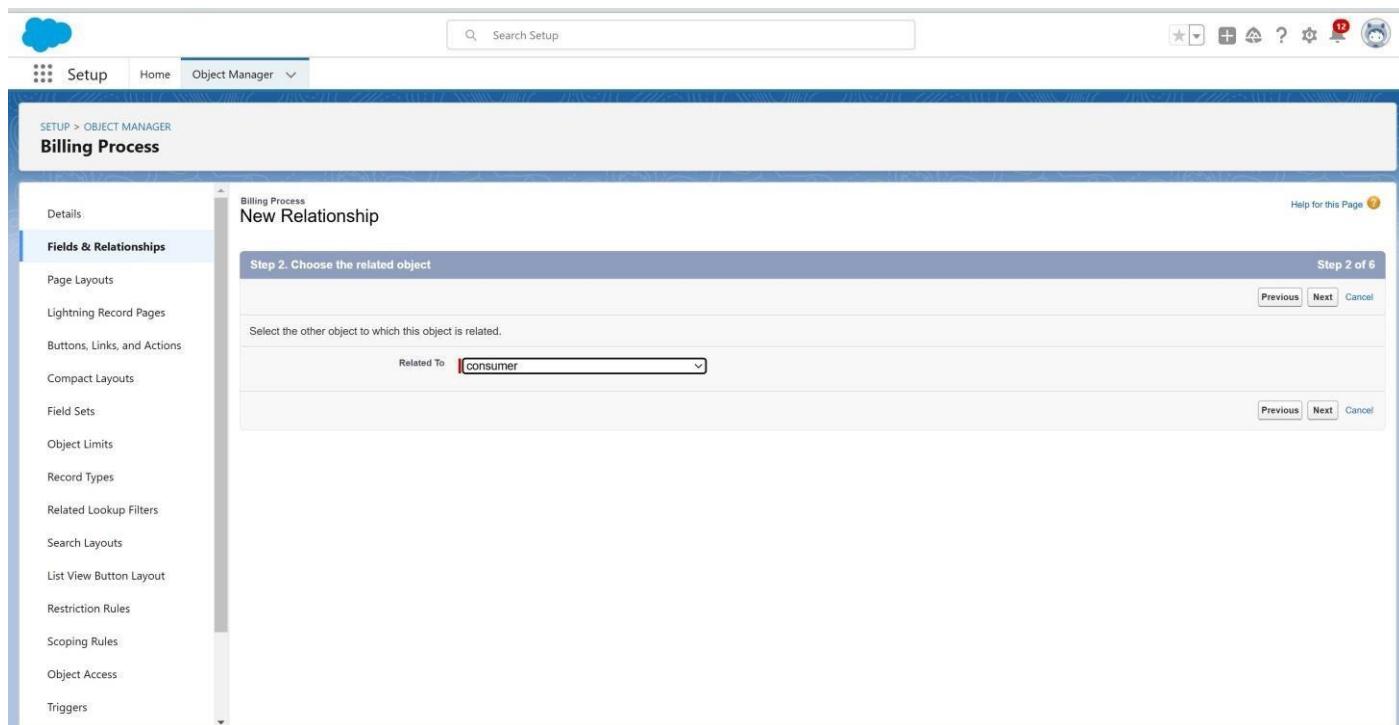
Fill the Above as following:

- Change the Field Label: Name
- Field Name :It's gets auto generated
- Click on Next >> Next >> Save and new.

2. To create another fields & relationship to an object:

1. Go to setup >> click on Object Manager >> type object name(Billing Process) in the search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New

3. Select Data Type as a “Lookup Relationship”
4. Click on Next
5. Click on the Related to drop down and Select the Laptop Booking object and click on Next



Creating the field in Total Laptops object

 Setup Home Object Manager

SETUP > OBJECT MANAGER
Billing Process

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

Billing Process New Custom Field

Step 1. Choose the field type

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

Data Type

None Selected Select one of the data types below.

Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

Master-Detail Relationship Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

External Lookup Relationship Allows users to select a True (checked) or False (unchecked) value.

Checkbox Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Currency

Help for this Page

Step 1
Next Cancel

 Setup Home Object Manager

SETUP > OBJECT MANAGER
Billing Process

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

Billing Process New Relationship

Step 2. Choose the related object

Select the other object to which this object is related.

Related To

Step 2
Previous Next Cancel

Setup > Object Manager

Billing Process

Fields & Relationships

New Relationship

Step 3. Enter the label and name for the lookup field

Field Label: Laptop Booking
Field Name: Laptop_Booking
Description:
Help Text:

Child Relationship Name: Billing_Process
Required: Always require a value in this field in order to save a record
 Clear the value of this field. You can't choose this option if you make this field required.
What to do if the lookup record is deleted?
 Don't allow deletion of the lookup record that's part of a lookup relationship.
 Add this field to existing custom report types that contain this entity

Lookup Filter
Optional. Create a filter to limit the records available to users in the lookup field. [Tell me more!](#)
[Show Filter Settings](#)

Step 3 of 6

Previous Next Cancel

Setup > Object Manager

Billing Process

Fields & Relationships

- Lookup Relationship
- Master-Detail Relationship
- External Lookup Relationship
- Checkbox
- Currency
- Date
- Date/Time
- Email
- Geolocation
- Number
- Percent
- Phone
- Picklist
- Picklist (Multi-Select)
- Text
- Text Area
- Text Area (Long)

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Allows users to select a True (checked) or False (unchecked) value.

Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Allows users to enter a date or pick a date from a popup calendar.

Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.

Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

Allows users to enter any number. Leading zeros are removed.

Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.

Allows users to enter any phone number. Automatically formats it as a phone number.

Allows users to select a value from a list you define.

Allows users to select multiple values from a list you define.

Allows users to enter any combination of letters and numbers.

Allows users to enter up to 255 characters on separate lines.

Allows users to enter up to 131,072 characters on separate lines.

Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

Setup > Object Manager

Billing Process

Step 2. Enter the details

Field Label: Payment Mode

Values:

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

Check
Credit card
Debit card
UPI
Phonepe
Saxxa
Paytm

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: Payment_Mode

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

Step 2 of 4

Previous Next Cancel

Setup > Object Manager

Billing Process

Step 1. Choose the field type

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

Data Type

None Selected Select one of the data types below.

Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

Master-Detail Relationship The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

External Lookup Relationship Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Checkbox Allows users to select a True (checked) or False (unchecked) value.

Currency Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Date Allows users to enter a date or pick a date from a popup calendar.

Date/Time Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.

Email Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

Step 1

Next Cancel

Step 2. Choose output type

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
- Checkbox
- Currency
- Date
- Date/Time
- 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: `Gross Margin = Amount - Cost_c`

Calculate a date, for example, by adding or subtracting days to other dates.
Example: `Reminder Date = 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: `Full Name = LastName & ", " & FirstName`

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

Decimal Places: Example: 999.00

Step 3. Enter formula

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.

Example: `Gross Margin = Amount - Cost_c` [More Examples...](#)

Simple Formula | Advanced Formula

Insert Field | Insert Operator

Amount (Currency) =

Quick Tips

- Getting Started
- Operators & Functions

Functions

— All Function Categories —

- ABS
- ACOS
- ADDMONTHS
- AND
- ASCII
- ASIN

Insert Selected Function

SETUP > OBJECT MANAGER

Total Laptops

New Custom Field

Step 1. Choose the field type

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

Data Type

None Selected Select one of the data types below.

Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Master-Detail Relationship Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

External Lookup Relationship The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

Checkbox Allows users to select a True (checked) or False (unchecked) value.

Currency Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Date Allows users to enter a date or pick a date from a popup calendar.

Step 1

Help for this Page

Next Cancel

SETUP > OBJECT MANAGER

Total Laptops

Step 2. Choose output type

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 - Cost`

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

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

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

Percent Calculate a percent and automatically add the percent sign to the number.
Example: `Discount = (Amount - Discounted_Amount_c) / 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(NOW()) + 1`

Options Example: 999

Step 2 of 5

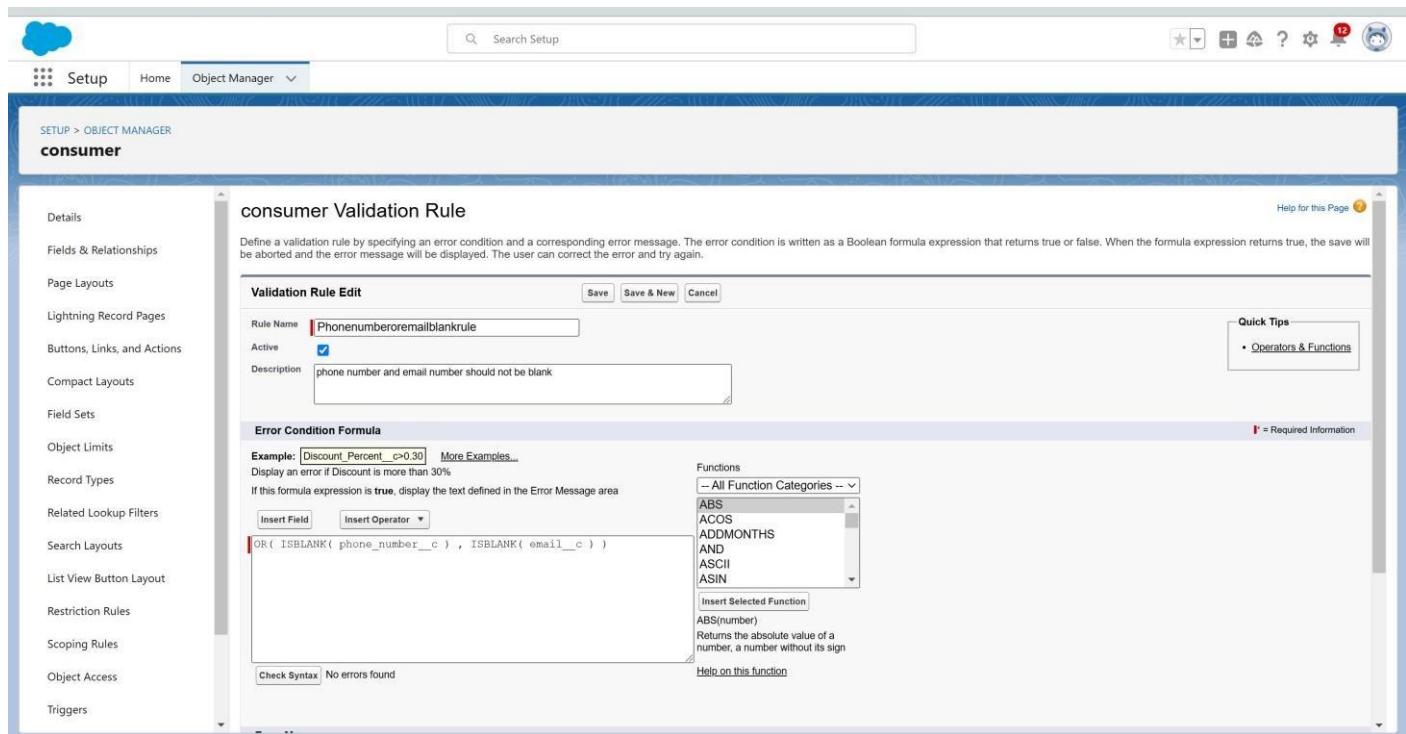
Previous Next Cancel

The screenshot shows the Salesforce Setup interface under the Object Manager for the 'Total Laptops' object. The 'Fields & Relationships' tab is active. In the main area, there's a formula editor with the text '50 - Laptops_delivered__c'. To the right, a sidebar lists various functions such as ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN, etc. A 'Quick Tips' section at the top right provides links to 'Getting Started' and 'Operators & Functions'.

Creating the validation rule for phone number field in consumer object

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.



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 it.

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile: Standard User

User License: Salesforce

Profile Name: owner

Save Cancel

Object	Read	Create	Edit	Delete	View All	Modify All
Finance Balance Snapshots	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Finance Transactions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fulfillment Orders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Gateway Provider Payment Method Types	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Guest User Anomaly Event Stores	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ideas	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Images	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Incidents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Individuals	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Inventory Reservations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Object	Read	Create	Edit	Delete	View All	Modify All
User External Credentials	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
Waitlists	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Web Cart Documents	<input type="checkbox"/>	<input type="checkbox"/>				
Web Store Inventory Sources	<input type="checkbox"/>	<input type="checkbox"/>				
Work Orders	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work Plans	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work Plan Templates	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work Step Templates	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Work Types	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work Type Groups	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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

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

Setting	Value
Session Times Out After	2 hours of inactivity
Session Security Level Required at Login	--None--

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 it.

The screenshot shows the Salesforce Setup interface under the Profiles section. A search bar at the top left contains 'profile'. The main area is titled 'Clone Profile' with the sub-section 'Enter the name of the new profile.' Below this, a note says 'You must select an existing profile to clone from.' A dropdown menu for 'Existing Profile' is set to 'Standard Platform User'. Under 'User License', 'Salesforce Platform' is selected. In the 'Profile Name' field, 'Agent' is typed. At the bottom right are 'Save' and 'Cancel' buttons.

The screenshot shows the 'Custom Object Permissions' section of the Profiles setup. It includes sections for 'Contacts', 'Push Topics', 'Sellers', 'Streaming Channels', and 'User External Credentials'. Below these, there are two tables for 'Custom Object Permissions' for 'Billing Process' and 'consumer' objects. The first table has columns for 'Basic Access' (Read, Create, Edit, Delete, View All, Modify All) and 'Data Administration' (View All, Modify All). The second table has similar columns for 'Laptop Bookings' and 'Total Laptops'. At the bottom, there are 'Session Settings' (Session Times Out After: 2 hours of inactivity) and 'Password Policies' (User passwords expire in: 90 days, Enforce password history: 3 passwords remembered, Minimum password length: 6, 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, Obscure secret answer for password resets). A note at the bottom states 'Requires a minimum 4 day password'.

Creating owner Role

Creating owner Role:

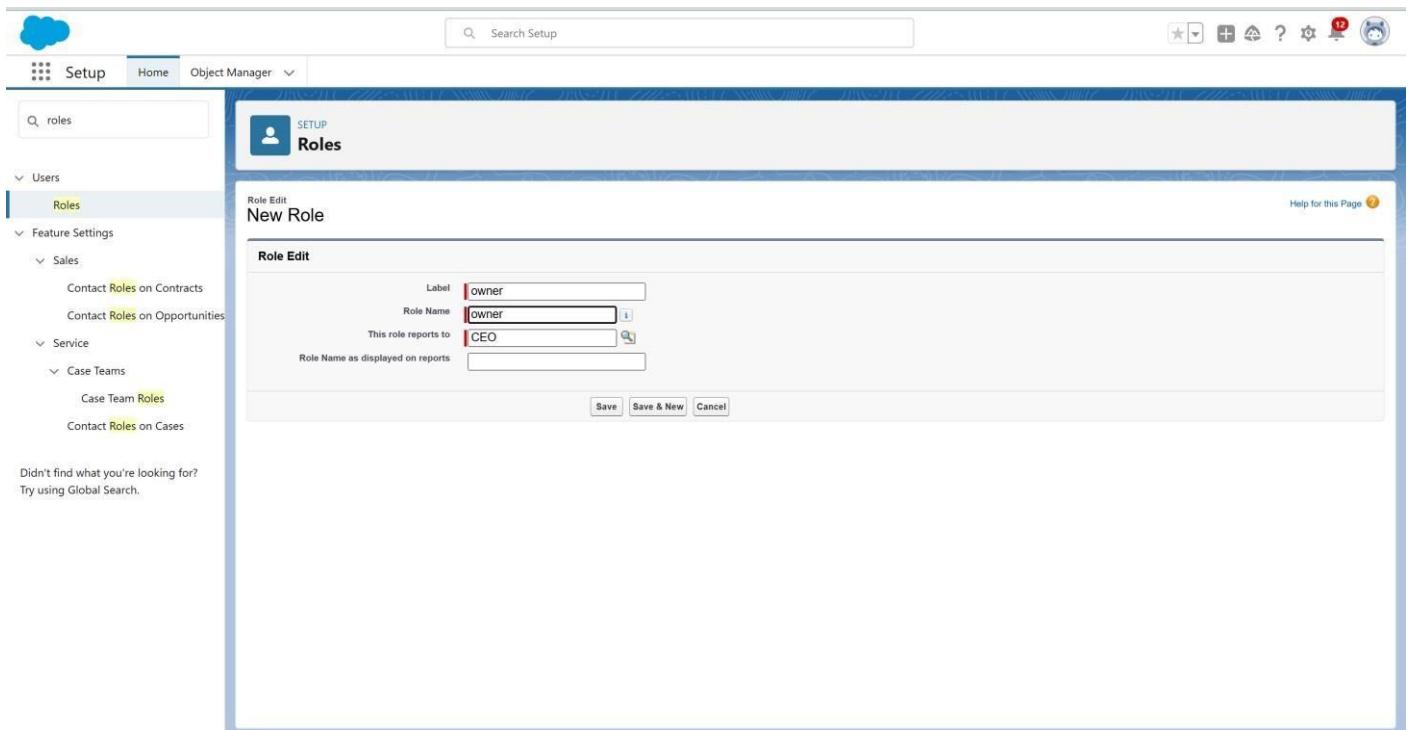
1. Go to quick find >> Search for Roles >> click on set up roles.
2. Click on Expand All and click on add role under whom this role works.

3. Give Label as “owner” and Role name gets auto populated. Then click on Save.
4. Click and save it.

Activity 2: Creating Agent roles

Creating another two roles under Owner

1. Go to quick find - Search for Roles - click on set up roles.
2. Click plus on CEO role, and click add role under owner.
3. Give Label as “Agent” and Role name gets auto populated. Then click on Save.



The screenshot shows the Salesforce Setup Roles page. The left sidebar has 'Users' expanded, with 'Roles' selected. The main area displays 'Your Organization's Role Hierarchy' in a tree view. The hierarchy starts with 'LBRECE' at the top, which branches into 'CEO', 'CFO', 'COO', 'owner', 'SVP, Customer Service & Support', 'SVP, Human Resources', 'SVP, Sales & Marketing', 'VP, International Sales', 'VP, Marketing', and 'Marketing Team'. Each role node has 'Edit | Del | Assign' buttons. A search bar at the top right says 'Search Setup'.

Create User

Activity 1: Creating User

1. Go to setup - type users in quick find box - select users -click New user.
2. Fill in the fields
3. First Name : vicky
4. Last Name : y
5. Alias : Give a Alias Name
6. Email id : Give your Personal Email id
7. Username : Username should be in this form: text@text.text
8. Nick Name : Give a Nickname
9. Role : owner
10. User license : Salesforce
11. Profiles : owner.
12. Save it.

Activity 2: Creating another Users

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

3. First Name : ram
4. Last Name : ram
5. Alias : Give a Alias Name
6. Email id : Give your Personal Email id
7. Username : Username should be in this form: text@text.text
8. Nick Name : Give a Nickname
9. Role : Agent
10. User license : Salesforce platform
11. Profiles : Agent.
12. Save it.

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

- Setup Home:** The top navigation bar includes links for Setup, Home, Object Manager, and a search bar labeled "Search Setup".
- Left Sidebar:** Under the "Users" section, the "User Management Settings" category is expanded, showing sub-options like Feature Settings, Data.com, Service, and User Interface.
- User Edit Screen:**
 - Title:** "User Edit" with buttons for Save, Save & New, and Cancel.
 - General Information:** Fields include First Name (vicky), Last Name (y), Alias (vicky), Email (rajumullangi5@gmail.com), Username (rajumullangi5@gmail.com), and Nickname (User17339737482299603).
 - Role:** owner
 - User License:** Salesforce
 - Profile:** owner
 - Active:** checked
 - Other Options:** Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Data.com User Type (None), Data.com Monthly Addition Limit (Default Limit (300)), Accessibility Mode (Classic Only), High-Contrast Palette on Charts, Load Lightning Pages While Scrolling (checked), Debug Mode, Quick Access Menu (checked), and Salesforce CRM Content User (checked).

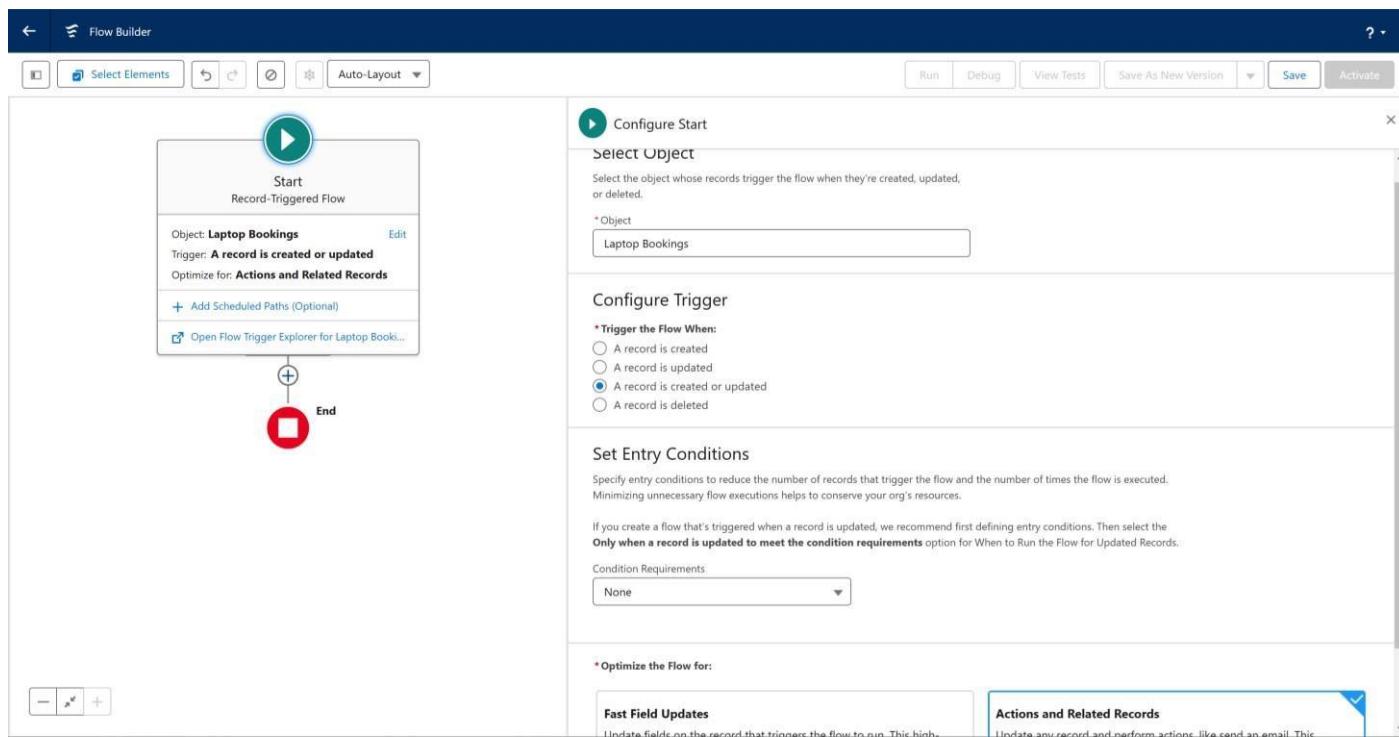
Flows

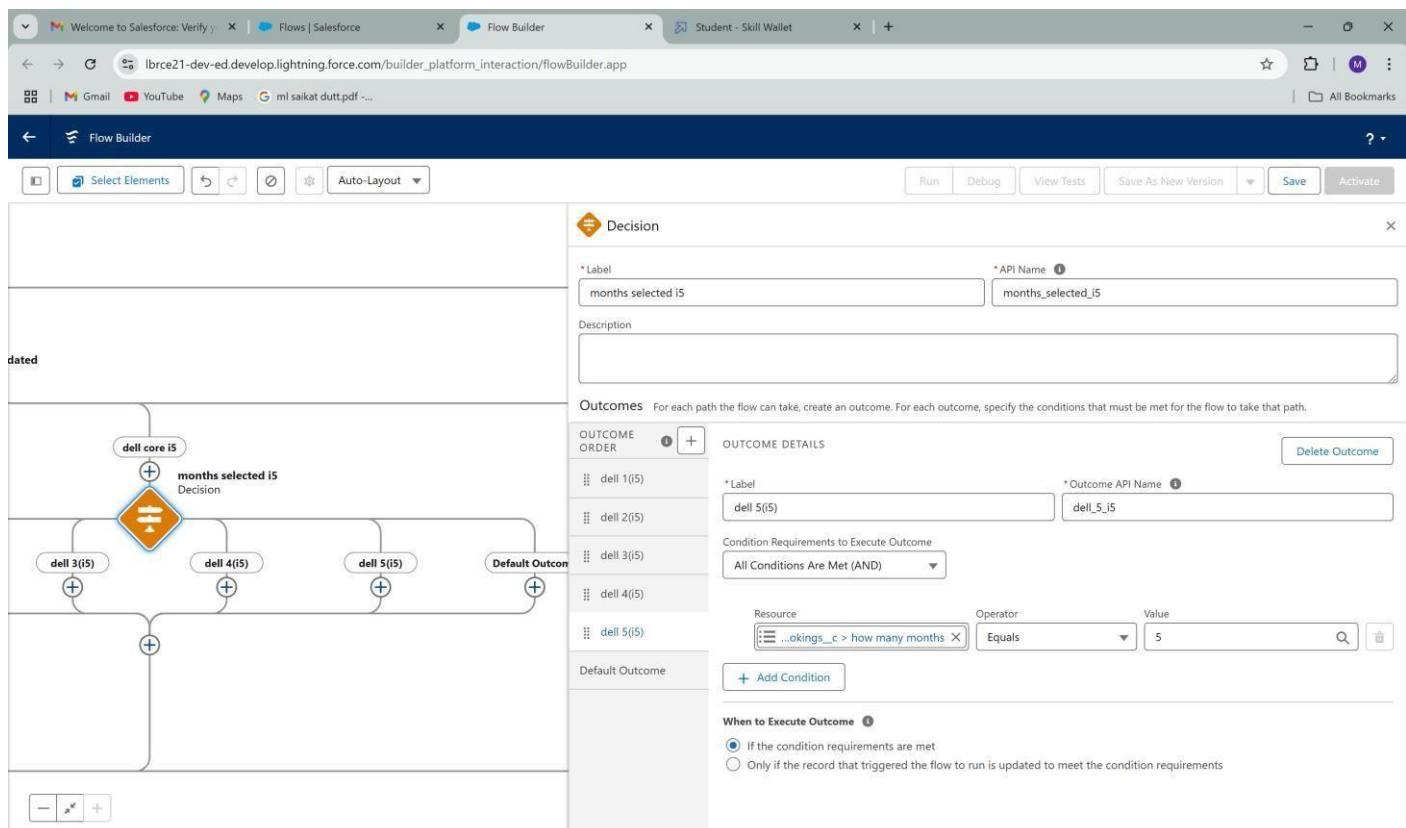
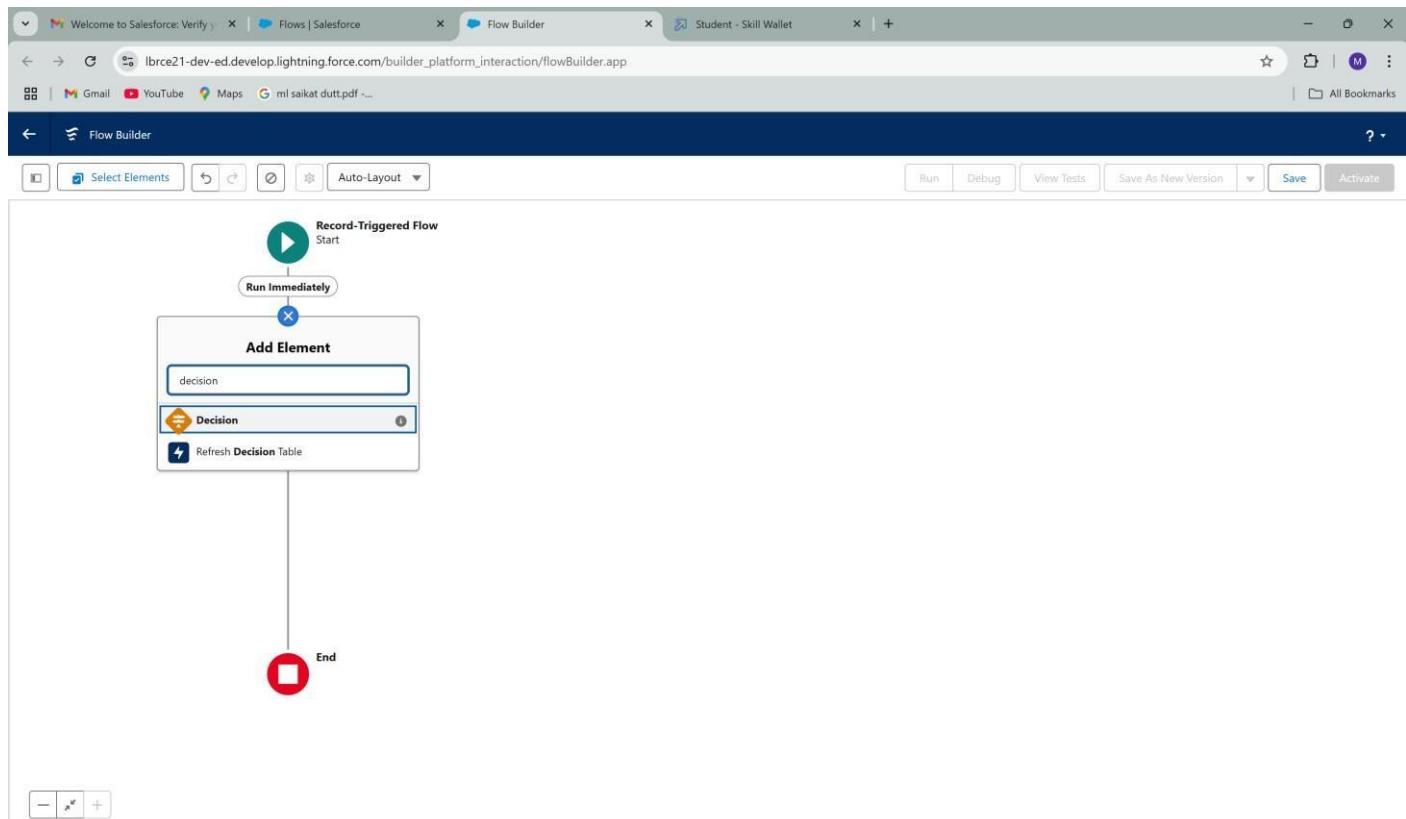
Create a Flow on dell laptop

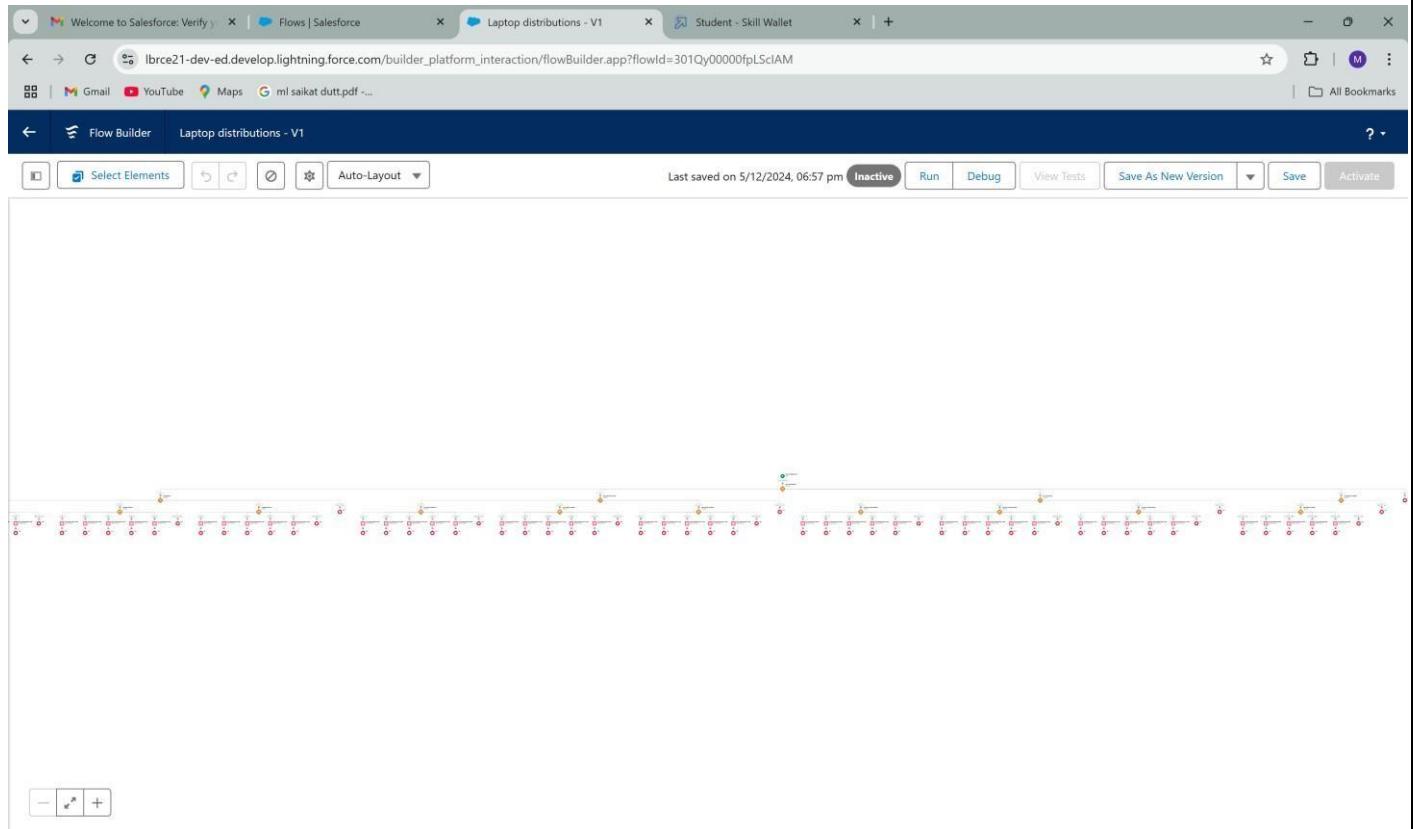
Activity - 1. Go to setup >> type Flow in quick find box >> Click on the Flow and Select the New Flow.

2. Select the Record-triggered flow and Click on Create.
3. Select the Object as a Laptop Booking in the Drop down list.
4. Select the Trigger Flow when: “A record is Created or Updated”.
5. Select the Optimize the flow for: “Actions and Related Records” and Click on Done.
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.
 1. Resource: Select \$Record.Laptop_name__c.
 2. Operator: Select Equals.
 3. Value: Select dell
 4. Add the same outcome order to acer , hp, mac.
 5. Rename Default outcome as False
 6. Click done.
9. Go to flow page
10. Beside dell there is a symbol ‘+’ click on that.
11. Again select decision
12. Enter the Details Label: Field should Update(any one u want), API name: Gets Automatically Generated.
13. select the Outcome Details Label: dell core i3 , Outcome API name: Gets Automatically Generated.
 1. Resource: Select {!\$Record.core_type__c}.

2. Operator: Select Equals.
 3. Value: Select core i3.
 4. Then again click the symbol '+' outcome details
14. select the Outcome '+' Details Label: dell core i5 , Outcome API name: Gets Automatically Generated.
1. Resource: Select Record.core type.
 2. Operator: Select Equals.
 3. Value: Select core i5.
 4. Then again click the symbol '+' outcome details
15. Enter the Outcome Details Label: dell core i7 , Outcome API name: Gets Automatically Generated.
1. Resource: Select Record.core type.
 2. Operator: Select Equals.
 3. Value: Select core i7.
16. Click done.
- Repeat the same process for Acer, HP and Mac
- Then,
- Click on save .
- Label: Laptop distributions, api name:- automatically filled
- Save the flow and activate it.







Apex Trigger and Handler Class

How to create a new trigger :

1. While still in the trailhead account, navigate to the gear icon in the top right corner.
2. Click on developer console and you will be navigated to a new console window.
3. Click on the File menu in the toolbar, and click on new? Trigger.
4. Enter the trigger name and the object to be triggered.

Syntax For creating trigger :

The syntax for creating trigger is :

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

```
{  
}
```

Trigger code:

```

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

Note:- copy the API names

1.LaptopBooking - trigger name

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

name). **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:-

1.Class name:- LaptopBookingHandler

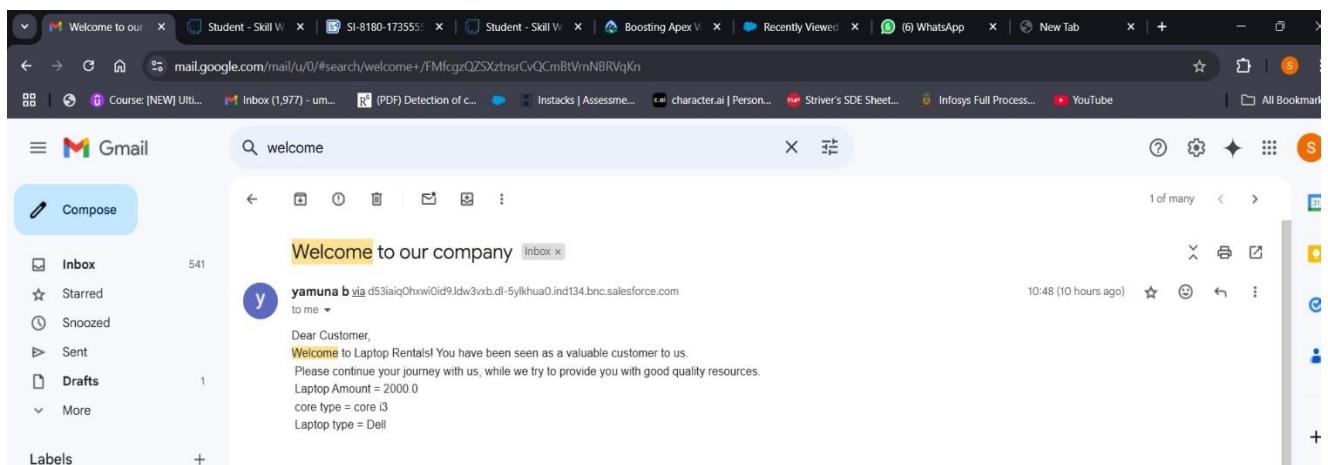
2.API Name:- Laptop_Bookings__c(as per your org go to laptop booking object and copy from that).

3.core __c (as per your org go to laptop booking object and copy from that).

4.Laptop_type__c.(as per your org go to laptop booking object 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.

Result:



Create Report

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

Create records for each one you have to create at least 2 different records i.e dell(i3), dell(i7),acer(i3),hp(i5),mac(bionic chip).

1. Go to the app ? click on the reports tab 2.
- Click New Report.

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

Create 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	X
Add ►	> 900 to 1500	intermediate	X
Add ►	> 1,500 to 10000	high	X
	> 10,000	very high	X

Treat empty Amount values in the report as zeros.

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

Click apply it.

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

LAPTOP RENTALS

REPORT ▾

Laptop Analytics / Total Laptops with Laptop Bookings and Consumer

Fields

- Groups
 - GROUP ROWS
 - Add group...
 - Types of Versions**
- GROUP COLUMNS
- Columns
 - Add column...
 - Laptop Bookings, Laptop Booki
 - Consumer: consumer Name
 - # Amount
 - # Laptops Available

Previewing a limited number of records. Run the report to see everything.

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 Conditional Formatting

Click on Save & run it.

The screenshot shows a web-based reporting interface. At the top, there's a navigation bar with various tabs and links. Below the navigation is a header bar with icons and dropdown menus. The main content area is a report titled "Report: consumer with Laptop Bookings and Total Laptops" and "Consumer with laptops and total laptops". The report includes a summary table with the following data:

Total Records	Total Amount
11	₹28,600

Below this is a detailed table of laptop bookings:

types of versions	consumer: consumer_name	Laptop Bookings: Laptop Bookings	Total Laptops: Total Laptops	Amount
basic (3)	Srinu	Sruthi	3	-
	silpa	acer	5	-
	Srinu	srinu	1	-
Subtotal				₹0
intermediate (1)	Srinu	srinu	1	₹1,000
	Subtotal			
high (7)	Srinu	Sruthi	10	₹4,500
	Srinu	Sruthi	10	₹5,000
	Srinu	ss	10	₹4,000
	Srinu	ss	2	₹2,000
	Srinu	Sruthi	3	₹5,100
	Srinu	Sruthi	10	₹3,000
	Srinu	yamua	3	₹4,000
Subtotal				₹27,600

At the bottom of the report interface, there are several control buttons: Row Counts, Detail Rows, Subtotals, and Grand Total. The status bar at the bottom right shows the date and time (05-01-2025, 09:16 PM), system temperature (22°C), and connectivity status.

Sharing report to owner

1. Click edit drop down and select subscribe option
2. Follow as per below image.
3. After selecting the run report as a “another person” select your personal account or whom you want to send that mail to.
4. Click save.
- 5.
6. NOTE: The owner gets daily email notification of that laptop booking report so that he can see all data remotely.

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

Total Records	Total Amount
11	₹28,600

types of versions + consumer: consumer_name Laptop Bookings: Laptop Bookings Total Laptops: Total Laptops Amount

<input type="checkbox"/> basic (3)	Srinu	Sruthi	3	-
	silpa	acer	5	-
	Srinu	srinu	1	-
Subtotal				
<input type="checkbox"/> intermediate (1)	Srinu	srinu	1	₹1,000
Subtotal				
<input type="checkbox"/> high (7)	Srinu	Sruthi	10	₹4,500
	Srinu	Sruthi	10	₹5,000
	Srinu	ss	10	₹4,000
	Srinu	ss	2	₹2,000
	Srinu	Sruthi	3	₹5,100
	Srinu	Sruthi	10	₹3,000
	Srinu	yamua	3	₹4,000
Subtotal				
				₹27,600

https://wise-raccoon-fcq82h-dev-ed.trailblaze.lightning.force.com/reports/lightningReportApp.app?reportId=00OWU000008qV7x2AE&isView=true&filterValues=%7B%7D#

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

Total Records	Total Amount
11	₹28,600

types of versions + consumer: consumer_name Laptop Bookings: Laptop Bookings Total Laptops: Total Laptops Amount

<input type="checkbox"/> basic (3)	Srinu			
	silpa			
	Srinu			
Subtotal				
<input type="checkbox"/> intermediate (1)	Srinu			
Subtotal				
<input type="checkbox"/> high (7)	Srinu			
	Srinu			
Subtotal				
Row Counts	Detail Rows	Subtotals	Grand Total	

Frequency: Daily Time: 10:00 am Attachment: Attach File Recipients: Me Run Report As: Me Unsubscribe Cancel Save

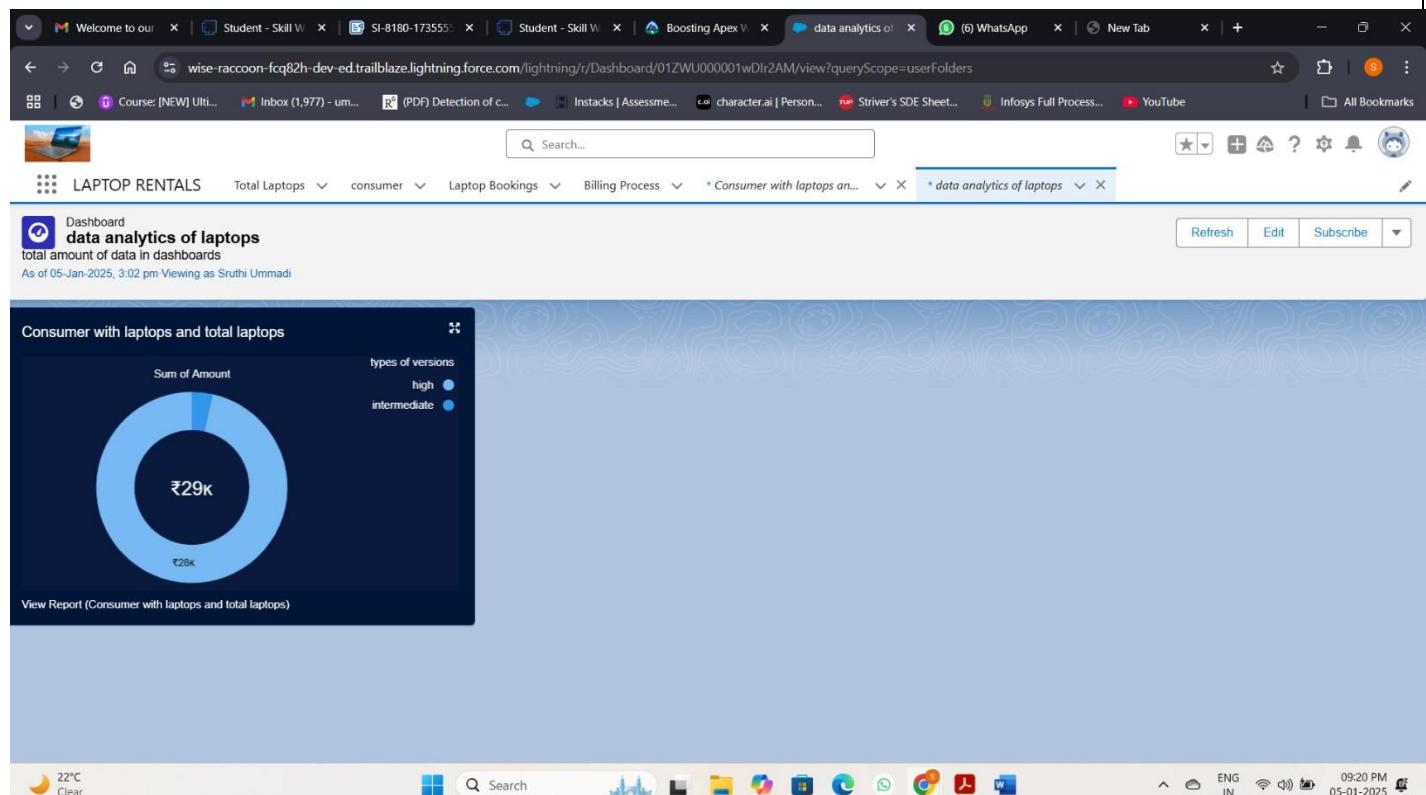
Create Dashboard Folder

1. Click on the app launcher and search for the dashboard.
2. Click on the dashboard tab.
3. Click the new folder, give the folder label as “total rent amount”.

4. Folder unique names will be auto populated.
5. Click save.

Create Dashboard

1. Go to the app >> click on the Dashboards tabs.
2. Give a Name and select the folder that was created, and click on create.
3. Select add component.
4. Select a Report and click on select.
5. Select the dark component and add to the dashboards.
6. Save it.
7. Click done.



Conclusion

The Laptop Rental System demonstrates how Salesforce can be effectively utilized to create a scalable and efficient rental platform. With its robust features and user-centric design, the system is well-suited to meet the growing demand for laptop rentals while providing valuable insights to service providers. Future enhancements may include AI-driven recommendations and blockchain-based contract management.

THE END