

Project Report

Project Title: Laptop Rental System

Platform: Salesforce

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A CRM APPLICATION FOR LAPTOP RENTALS

Project Overview

Abstract:

The *Laptop Rentals* project uses Salesforce to efficiently manage laptop rentals. By leveraging custom objects, automation, and dynamic reporting, it addresses challenges like real-time inventory tracking, automated notifications, and scheduling. This scalable solution enhances operational efficiency, ensures accurate data handling, and provides a seamless experience for both administrators and users.

Detailed Overview

The project automates and streamlines laptop rental processes using Salesforce features like custom objects, validation rules, flows, and dashboards. Key goals include:

- Maintaining accurate inventory records
- Automating booking and notifications
- Providing real-time insights into laptop availability

Objectives:

Business Goals

- Improve resource management for laptop rentals
- Enhance customer satisfaction through automation and timely responses

Specific Outcomes

- Scalable rental record management
- Automated booking confirmations and inventory updates
- Real-time tracking of laptop availability

Salesforce Key Features Utilized

1. **Objects**
 - *LaptopBookings* object with fields like Laptop Name, Core Type, Amount, and Laptops Available (formula field).
2. **Tabs**
 - Custom tab for easy access to LaptopBookings.
3. **Lightning App**
 - Laptop Rentals App integrates LaptopBookings, dashboards, and reports for smooth navigation.
4. **Fields**
 - Dynamic formula fields for real-time data updates.
5. **Validation Rules**
 - Ensure data integrity, e.g., prevent bookings when laptops are unavailable.
6. **Profiles and Permissions**
 - Controlled access to LaptopBookings: Admins have full access, users can only manage their bookings.
7. **Roles and Hierarchy**
 - Defined roles for data visibility: Admins, Managers, and Users.
8. **Users**
 - Configured roles and profiles to meet project requirements.
9. **Flows**
 - *Laptop Booking Notification Flow*: Sends email notifications.
 - *Inventory Update Flow*: Adjusts laptop availability post-booking.
10. **Reports**
 - *Rental Summary Report*: Bookings by laptop type.
 - *Revenue Report*: Earnings from rentals.
11. **Dashboards**

Detailed Steps to Solution Design:

1. Object Creation

Create Total Laptops Object:

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

1) Enter the label name>> Total Laptops

2) Plural label name>> Total Laptops

3) Enter Record Name Label and Format

Record Name >>Total Laptops

Data Type >> Text

Click on Allow reports,Allow search and Track Field History,

Allow search >> Save

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. A new object is being created with the following details:

- Label:** Total Laptops
- Plural Label:** Total laptops
- Object Name:** Total_Laptops
- Description:** (Empty text area)
- Context-Sensitive Help Setting:** Open the standard Salesforce.com Help & Training window (selected)
- Content Name:** None

The screenshot shows the Salesforce Setup interface for creating a new object. The left sidebar lists various setup categories like Fields & Relationships, Page Layouts, and Object Limits. The main area is titled 'Total Laptops' under 'Object Manager'. It contains several configuration sections:

- Details**: Shows the Record Name 'Total Laptops' and Data Type 'Text'. A warning message states: "Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type".
- Optional Features**: Includes checkboxes for Allow Reports, Allow Activities, Track Field History, Allow in Chatter Groups, and Enable Licensing.
- Object Classification**: Includes checkboxes for Allow Sharing, Allow Bulk API Access, and Allow Streaming API Access.
- Deployment Status**: Shows 'Deployed' selected.
- Search Status**: Shows 'Searchable' selected.

Total Laptops object created:

The screenshot shows the Salesforce Setup interface displaying the details of the 'Total Laptops' object. The left sidebar shows the same setup categories as before. The main area is titled 'Total Laptops' under 'Object Manager' and displays the following details:

Details	
Description	
API Name	Total_Laptops_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

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

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

Consumer object created sucessfully by following above steps:

The screenshot shows a web browser window with multiple tabs open, including WhatsApp, SI-7999-173582, Student - Skill W, Student Dashboard, Surya Rohith Me, Add New Users, Home | Salesforce, consumer | Sales, and another Home | Salesforce tab. The main content area is the Salesforce Object Manager. The URL in the address bar is creative-goat-s6z4ho-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01IWU000001x87p/Details/view. The page title is "SETUP > OBJECT MANAGER consumer". On the left, a sidebar lists various object settings like 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 right panel is titled "Details" for the "consumer" object. It contains fields for Description, API Name (consumer_c), Singular Label (consumer), Plural Label (consumer), and other settings like Enable Reports (unchecked), Track Activities (unchecked), Track Field History (unchecked), Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). At the bottom right of the panel are "Edit" and "Delete" buttons.

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

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

3. Allow search >> Save.

Laptop Bookings object created sucessfully by following above steps:

The screenshot shows the Salesforce Setup interface, specifically the Object Manager section. The URL in the browser is <https://creative-goat-s6z4ho-dev-ed.trailblaze.lightning.force.com/lightning/setup/ObjectManager/01IWU000001xFX7/Details/view>. The page title is "Laptop Bookings".

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, and List View Button Layout.

The main content area is divided into two columns: "Details" and "Fields & Relationships".

Details Column:

- Description: Consum
- API Name: Laptop_Bookings_c
- Custom: ✓
- Singular Label: Laptop Bookings
- Plural Label: Laptop Bookings

Fields & Relationships Column:

- Enable Reports: ✓
- Track Activities: ✓
- Track Field History: ✓
- Deployment Status: Deployed
- Help Settings: Standard salesforce.com Help Window

At the bottom right of the main area are "Edit" and "Delete" buttons.

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

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

Billing Process object created sucessfully by following above steps:

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes links for WhatsApp, SI-7999-173582, Student - Skill W, Student Dashboard, Surya Rohith M, Add New Users, Home | Salesforce, and Billing Process. Below the navigation is a toolbar with icons for Refresh, Help, and Relaunch to update. The main area has tabs for Setup, Home, and Object Manager, with the Object Manager tab selected. A search bar contains the word "consum". The left sidebar lists various object settings: 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 right panel displays the "Billing Process" object details. The "Details" section shows the API Name as "Billing_Process__c", the Singular Label as "Billing Process", and the Plural Label as "Billing Process". Under "Fields & Relationships", there is a "Description" field. On the right, checkboxes for "Enable Reports", "Track Activities", "Track Field History", and "Deployment Status" are checked. The "Deployment Status" is set to "Deployed". At the bottom right of the panel are "Edit" and "Delete" buttons.

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.

Creating a Custom Tab

To create a Tab:()

Go to setup page >> Type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)

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 .

Make sure that the Append tab to users' existing personal customizations is checked.

Click save



Step 3. Add to Custom Apps

Step 3 of 3

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

Custom App	<input checked="" type="checkbox"/> Include Tab
Platform (standard_Platform)	<input type="checkbox"/>
Sales (standard_Sales)	<input type="checkbox"/>
Service (standard_Service)	<input type="checkbox"/>
Marketing (standard_Marketing)	<input type="checkbox"/>
Sample Console (standard_ServiceConsole)	<input type="checkbox"/>
High Volume Customer Portal User	<input type="checkbox"/>
Authenticated Website User	<input type="checkbox"/>
App Launcher (standard_AppLauncher)	<input type="checkbox"/>

Activity 2: Creating Remaining Tabs

Now create the Tabs for the remaining Objects, they are “consumer,Laptop Booking,Billing process”.

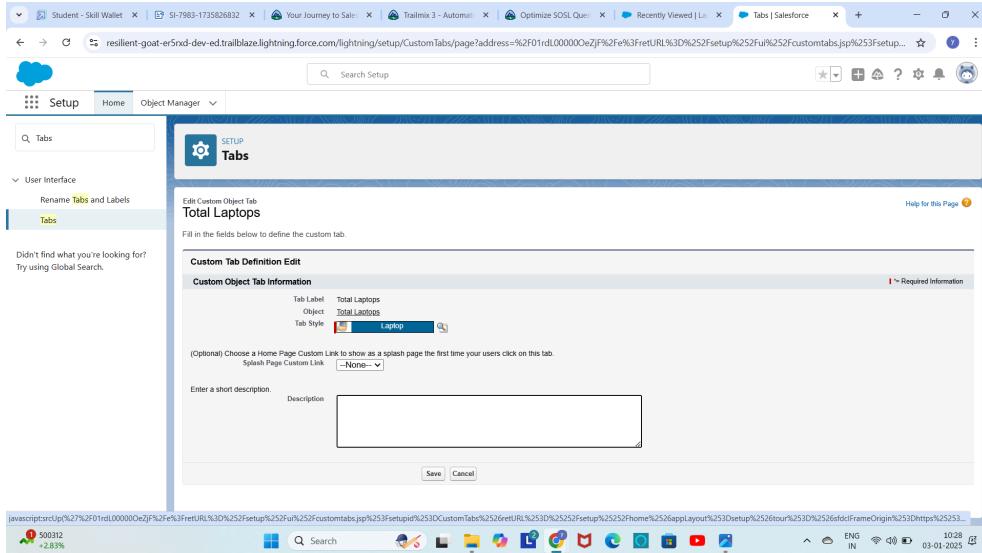
Follow the same steps as mentioned in Activity -1

Billing process Tab Created:

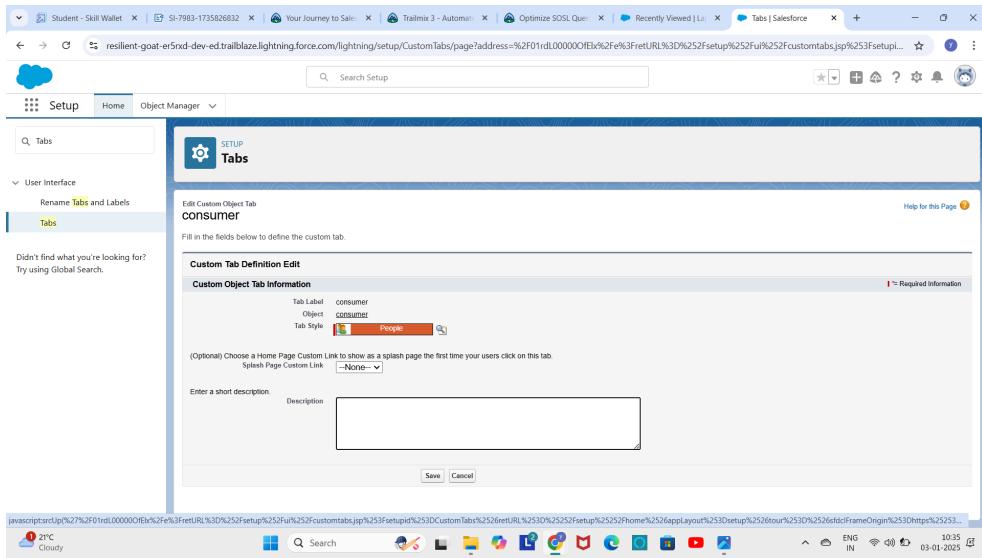
The screenshot shows the Salesforce Setup interface with the following details:

- Page Header:** Student - Skill Wallet, SI-7983-1735826832, Your Journey to Sale!, Trailmix 3 - Automat!, Optimize SOSL Query, Recently Viewed | Links, Tabs | Salesforce.
- Left Sidebar:** User Interface, Rename Tabs and Labels, **Tabs**.
- Current Page:** Edit Custom Object Tab, **Laptop Bookings**.
- Form Fields:**
 - Custom Tab Definition Edit**
 - Custom Object Tab Information** (Required information):
 - Tab Label: Laptop Bookings
 - Object: Laptop Bookings
 - Tab Style: Laptop
 - (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: Enter a short description.
 - Buttons: Save, Cancel.
- Bottom Status Bar:** 500/12, 12.83%, Search, File, Home, Recent, ENG IN, 10:29, 03-01-2025.

Total Laptops Tab created:



Consumer Tab created:



Create a Lightning App

To create a lightning app page:

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

The screenshot shows the Lightning Experience App Manager interface. On the left, there's a sidebar with 'Setup' and 'Home' tabs, and a search bar. The main area displays a table of apps with columns for App Name, Developer Name, Description, Last Modified, App Type, and Version. The app 'LAPTOP RENTALS' is highlighted in blue. At the bottom of the page, there's a toolbar with various icons.

App Name	Developer Name	Description	Last Modified	App Type	Version
10 Dataloader Partner	Dataloader_Partner	The Data Loader is an easy to use graphical tool that helps you to get you...	22/06/2024, 6:14 pm	Connected (Managed)	
11 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	22/06/2024, 6:14 pm	Lightning	✓
12 Dreamhouse	Dreamhouse		22/06/2024, 8:20 pm	Lightning	✓
13 Force.com IDE	Forcecom_IDE	The Force.com IDE is a powerful client application for creating, modifying,...	22/06/2024, 6:14 pm	Connected (Managed)	
14 How We Roll Maintenance	How_We_Roll_Maintenan...		16/11/2024, 10:10 am	Lightning	✓
15 LAPTOP RENTALS	LAPTOP_RENTALS		30/12/2024, 11:10 am	Lightning	✓
16 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	22/06/2024, 6:14 pm	Lightning	✓
17 Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	22/06/2024, 6:14 pm	Classic	✓
18 Platform	Platform	The fundamental Lightning Platform	22/06/2024, 6:14 pm	Classic	
19 Playground Starter	Playground_Starter	Get started with your Trailhead Playground.	22/06/2024, 6:14 pm	Lightning (Managed)	✓
20 Recruiting	Recruiting	Custom app for the HR department	23/06/2024, 1:04 pm	Lightning	✓
21 Sales	Sales	The world's most popular sales force automation (SFA) solution	22/06/2024, 6:14 pm	Classic	
22 Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	22/06/2024, 6:14 pm	Lightning	✓
23 Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one s...	22/06/2024, 6:14 pm	Lightning	✓

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.

The screenshot shows the Lightning App Builder interface. The left sidebar has 'App Settings' and 'App Details & Branding' selected. The main area is titled 'App Details & Branding'. It contains sections for 'App Details' (App Name: LAPTOP RENTALS, Developer Name: LAPTOP_RENTALS), 'App Branding' (Image: Laptop Rent logo, Primary Color Hex Value: #0070D2), and 'Org Theme Options' (checkbox: Use the app's image and color instead of the org's custom theme). Below this is an 'App Launcher Preview' section showing the app icon and name.

Upload a photo that is related to your app.

To Add Navigation Items:

The screenshot shows the 'Navigation Items' section of the Lightning App Builder. On the left, there's a sidebar with 'App Settings' and 'Navigation Items' selected. Under 'Navigation Items', there's a link to 'User Profiles'. The main area has two sections: 'Available Items' and 'Selected Items'. The 'Available Items' section contains a search bar and a list of items like Accounts, All Sites, Alternative Payment Methods, etc. The 'Selected Items' section contains four items: Laptop Bookings, Total Laptops, Billing Process, and consumer. There are up and down arrow buttons between the two sections to move items.

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

To Add User Profiles:

The screenshot shows the 'User Profiles' section of the Lightning App Builder. On the left, there's a sidebar with 'App Settings' and 'User Profiles' selected. The main area has two sections: 'Available Profiles' and 'Selected Profiles'. The 'Available Profiles' section contains a search bar and a list of profiles: Agent, Analytics Cloud Integration User, Analytics Cloud Security User, Authenticated Website, B2B Reordering Portal Buyer Profile, Cleaner, Contract Manager, Cross Org Data Proxy User, Custom: Marketing Profile, and Custom: Sales Profile. The 'Selected Profiles' section contains one profile: System Administrator. There are up and down arrow buttons between the two sections to move profiles.

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

Laptop Bookings Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount_c	Currency(18, 0)		
Consumer	Consumer_c	Master-Detail(consumer)		✓
Core Type	Core_c	Picklist	Laptop names	
Created By	CreatedBy	Lookup(User)		
Email Address	Email_c	Email		
how many months	how_many_months_c	Picklist		
Laptop Bookings	Name	Text(80)		✓
Laptop names	Laptop_names_c	Picklist		
Laptops Available	Laptops_Available_c	Formula (Number)		

Laptop Bookings Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Email Address	Email_c	Email		
how many months	how_many_months_c	Picklist		
Laptop Bookings	Name	Text(80)		✓
Laptop names	Laptop_names_c	Picklist		
Laptops Available	Laptops_Available_c	Formula (Number)		
Last Modified By	LastModifiedBy	Lookup(User)		
Name	Name_c	Lookup(consumer)		✓
Record Type	RecordTypeId	Record Type		✓
Total No Of Laptops	Total_No_Of_Laptops_c	Master-Detail(Total Laptops)		✓

Fields:Creating the field in consumer object

1. To create fields in an object:

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

Now click on “Fields & Relationships” >> New

Select Data Type as a “Phone”

Click on next

Fill the Above as following:

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

The screenshot shows the 'Step 2. Enter the details' screen for creating a new field. The field is named 'phone_number'. It is set to be required and added to custom report types. The default value is set to 'Show Formula Editor' with the formula syntax described. The 'Description' and 'Help Text' fields are empty. The 'Required' and 'Auto add to custom report type' checkboxes are checked. The 'Default Value' field contains a formula editor with instructions. Navigation buttons 'Previous', 'Next', and 'Cancel' are visible at the bottom right.

2. To create another fields in an object:

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

consumer
New Custom Field

Step 2. Enter the details

Field Label: Email

Field Name: Email

Description:

Help Text:

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

Unique: Do not allow duplicate values

External ID: Set this field as the unique record identifier from an external system

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

Default Value: Show Formula Editor

3. To create another fields in an object:

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

consumer
Step 2. Enter the details

Field Label: Address

Field Name: Address

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 ('like_text'), include numbers without quotes ('25'), show percentages as decimals (.01), and express date calculations in the standard format: (Today) + 7. To reference a field from a Custom Metadata type record use: @CustomMetadataType__r.name__c

4. To create another fields in an object:

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

Now click on “Fields & Relationships” >> New

Select Data type as a “Picklist” and Click on Next

Fill the Above as following:

Field Label: consumer Status

Value - Select enter values with each value separated by a new line

Student

Employee

Others

Select required

Field Name :It's gets auto generated

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

SETUP > OBJECT MANAGER
consumer

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Field Label consumer status

Values

Use global picklist value set

Enter values, with each value separated by a new line

student
employee
others

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 consumer_status

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

Feildscreated in Consumer:

SETUP > OBJECT MANAGER
consumer

Details

Fields & Relationships 8 items, Sorted by Field Label

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		

Quick Find New Deleted Fields Field Dependencies Set History Tracking

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

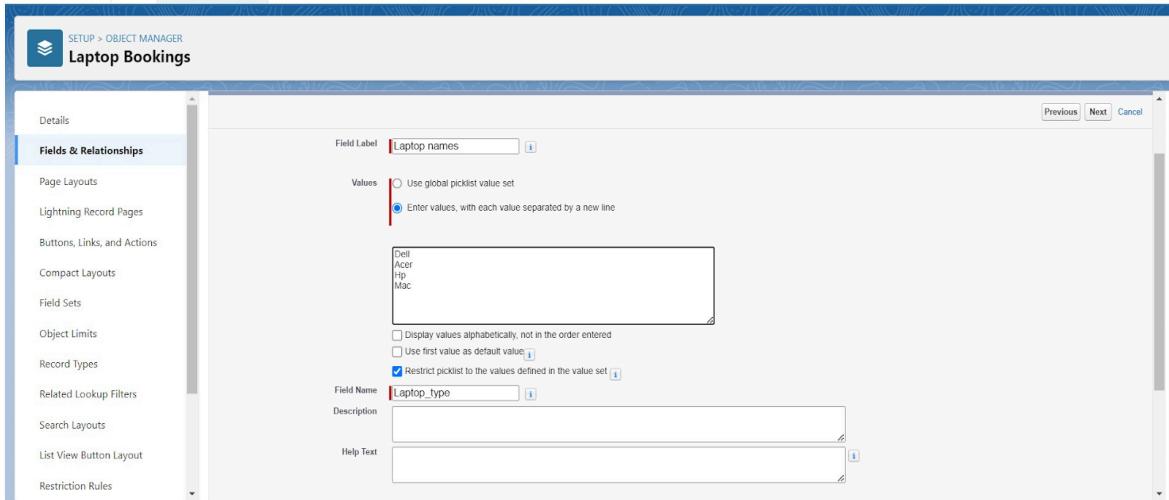
21°C Cloudy Search

ENG IN 10:55 03-01-2020

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

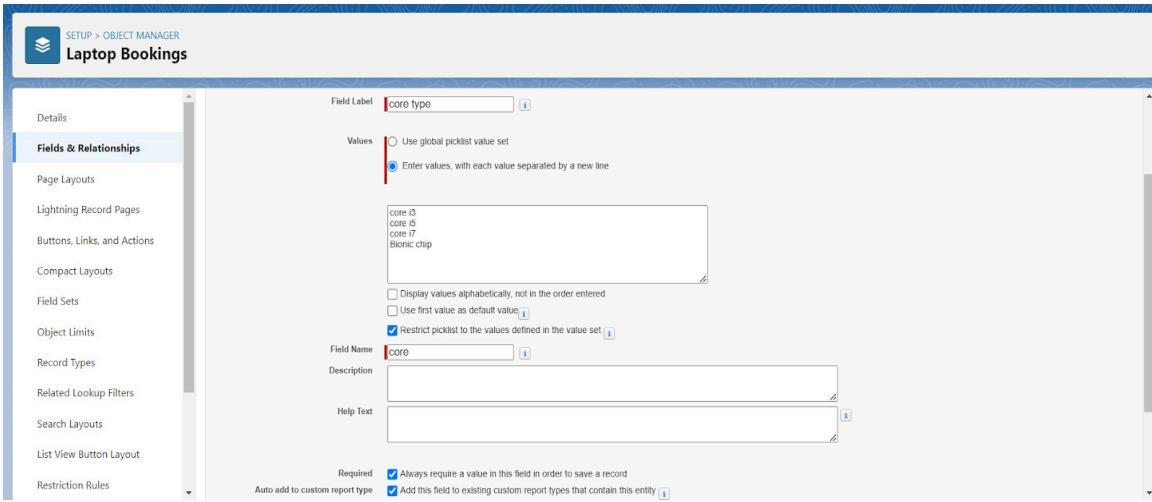


6. Select required
7. Click on Next >> Next >> Save and new

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

To create fields & relationship to an object:

- 1.Go to setup >> click on Object Manager >> type object name(Laptop Booking) in the search bar >> click on the object.
- 2.Now click on “Fields & Relationships” >> New
- 3.Select Data Type as a “Picklist” and Label: Core Type
- 4.Picklist values are:-1.core i3 2. Core i5 3. Core i7 4.Bionic Chip .



5. Select required

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

NOTE:-

Field Dependency:

A field dependency refers to a relationship between two fields on an object where the values of one field determine the available values for another field. Field dependencies are commonly used to create picklist field relationships, where the available options in a dependent picklist are determined by the value selected in a controlling picklist.

Need to use Field Dependency:

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

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

To create field dependency to an object:

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

2. click field dependency and next

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

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

The screenshot shows the Salesforce Object Manager interface for creating a relationship. On the left, a sidebar lists various setup options like 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, and Restriction Rules. The 'Fields & Relationships' option is selected. In the main area, a 'Controlling Field' is set to 'Laptop names' and a 'Dependent Field' is set to 'core type'. A legend indicates that yellow cells represent 'Included Value' and grey cells represent 'Excluded Value'. Below the fields, there are two tables for selecting values. The top table shows 'Laptop names' (Dell, Acer, HP, Mac) and 'core type' (core i3, core i5, core i7, Bionic chip). The bottom table shows the same columns. Both tables have 'Include Values' and 'Exclude Values' buttons at the bottom. A message at the top right says 'Showing Columns: 1 - 4 (of 4) < Previous | Next > View All Go to'.

Click save.

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

To create fields & relationship to an object:

1. Go to setup >> click on Object Manager >> type object name(Laptop Booking) in the search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data Type as a “Master-Detail Relationship”
4. Click on Next
5. Click on the Related to drop down and Select the “consumer” object and click on Next
6. Fill the Above as following:
 - Change the Field Label: Consumer
 - Field Name :It's gets auto generated

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

To create fields in an object:

- 1.Go to setup >> click on Object Manager >> type object name(Laptop Booking) in the 2.search bar >> click on the object.
- 3.Now click on “Fields & Relationships” >> New
- 4.Select Data Type as a “Currency”

5.Click on Next

Fill the Above as following:

- Field Label: Amount
- Length: (18,0)
- Field Name :It's gets auto generated
- Click on Next >> Next >> Save and new

SETUP > OBJECT MANAGER
Laptop Bookings

Step 2. Enter the details Step 2 of 4

Field Label: Amount

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

Length: 18 Number of digits to the left of the decimal point

Decimal Places: 0 Number of digits to the right of the decimal point

Field Name: Amount

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

To Create a Fields & Relationship to an Object

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

Now click on “Fields & Relationships” >> New

Select Data Type as a “Lookup Relationship”

Click on Next

SETUP > OBJECT MANAGER
Laptop Bookings

Step 2. Choose the related object Step 2 of 6

Related To: Total laptops

Help for this Page

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

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

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

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

To create fields & relationship to an object:

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

Now click on “Fields & Relationships” >> New

Select Data Type as a “Email”

Click on Next and save it.

Fields created in Laptop bookings:

The screenshot shows the Salesforce Object Manager interface for the 'Laptop Bookings' object. The left sidebar lists various setup options such as Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main content area is titled 'Fields & Relationships' and displays a table of fields. The table columns are: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed include:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount_c	Currency(18, 0)		
Consumer	Consumer_c	Master-Detail(consumer)		✓
Core Type	Core_c	Picklist	Laptop names	
Created By	CreatedById	Lookup(User)		
Email Address	Email_c	Email		
how many months	how_many_months_c	Picklist		
Laptop Bookings	Name	Text(80)		✓
Laptop names	Laptop_names_c	Picklist		
Laptops Available	Laptops_Available_c	Formula (Number)		

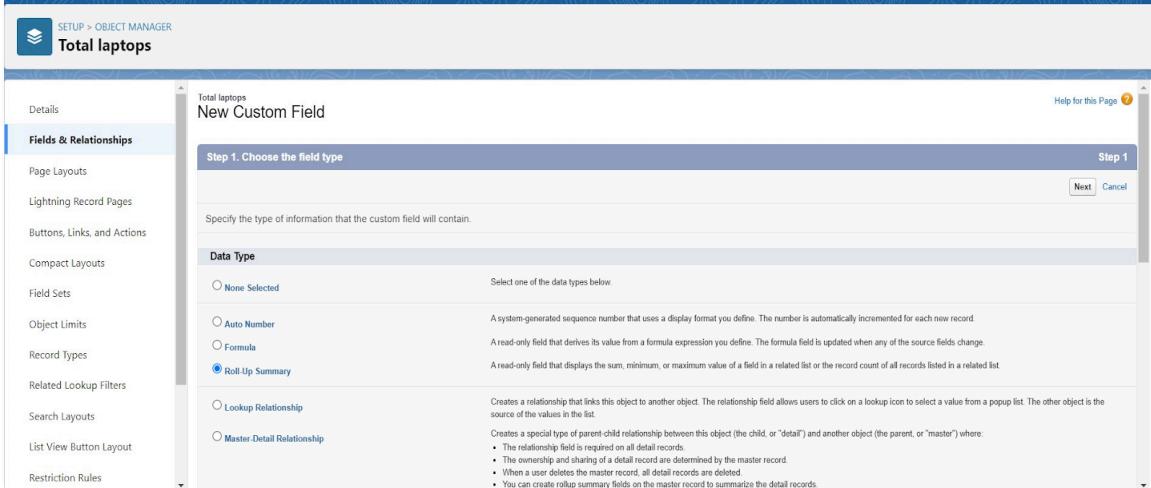
Below the main table, there is another section for 'Record Types' which includes fields like Laptops Available, Last Modified By, Name, Record Type, and Total No Of Laptops.

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

After Creating the Master-Detail Relationship Than Only you can create the Rollup Summary

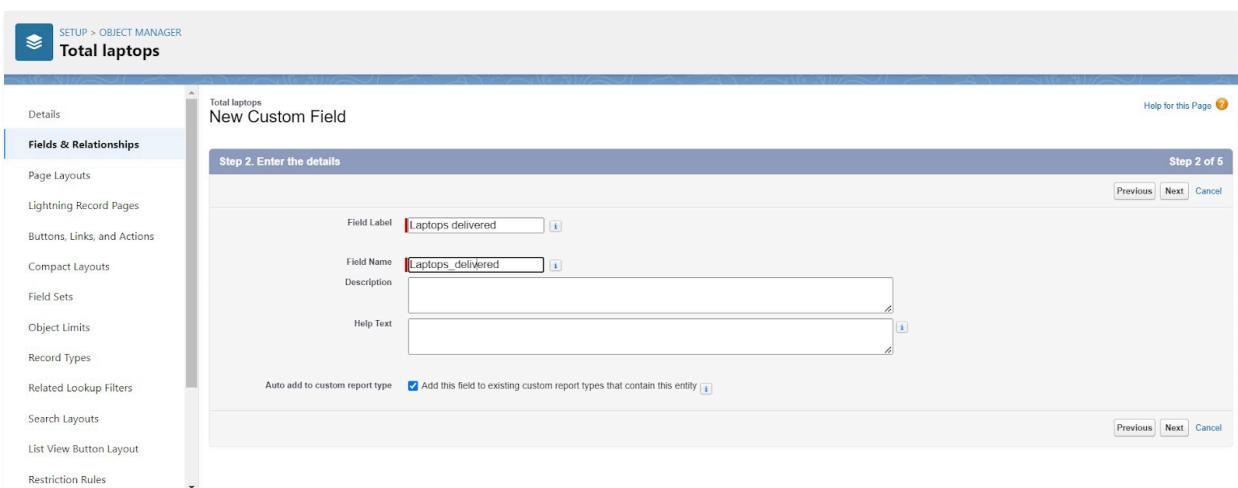
Go to setup >> click on Object Manager >> type object name(Total Laptops) in the search bar >> click on the object.

Now click on “Fields & Relationships” >> New



Select Data type as a “Roll-up Summary” and Click on Next

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



- Click on Next

Select the Laptop Bookings in the Summarized Object

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

SETUP > OBJECT MANAGER

Total laptops

New Custom Field

Step 3 of 5

Select Object to Summarize

Master Object	Total laptops
Summarized Object	Laptop Bookings
Select Roll-Up Type	
<input checked="" type="radio"/> COUNT <input type="radio"/> SUM <input type="radio"/> MIN <input type="radio"/> MAX	
Field to Aggregate	
<input checked="" type="radio"/> All records should be included in the calculation <input type="radio"/> Only records meeting certain criteria should be included in the calculation	

Help for this Page

Previous Next Cancel

Fields created in Total Laptops:

Student - Skill Wallet | SI-7983-1735826832 | Your Journey to Sales | Trailmix 3 - Automat | Optimize SOSL Query | Recently Viewed | Total Laptops | Sales | + | - | ⌂ | Total Laptops | Sales | X

resilient-goat-er5rxed-dev.trailblaze.lightning.force.com/lightning/setup/ObjectManager/01IdL000003OXKT/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER

Total Laptops

Fields & Relationships

6 Items, Sorted by Field Label

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

Quick Find New Deleted Fields Field Dependencies Set History Tracking

SENSEX -0.75% 11:05 03-01-2025 ENG IN

To create fields in an object:

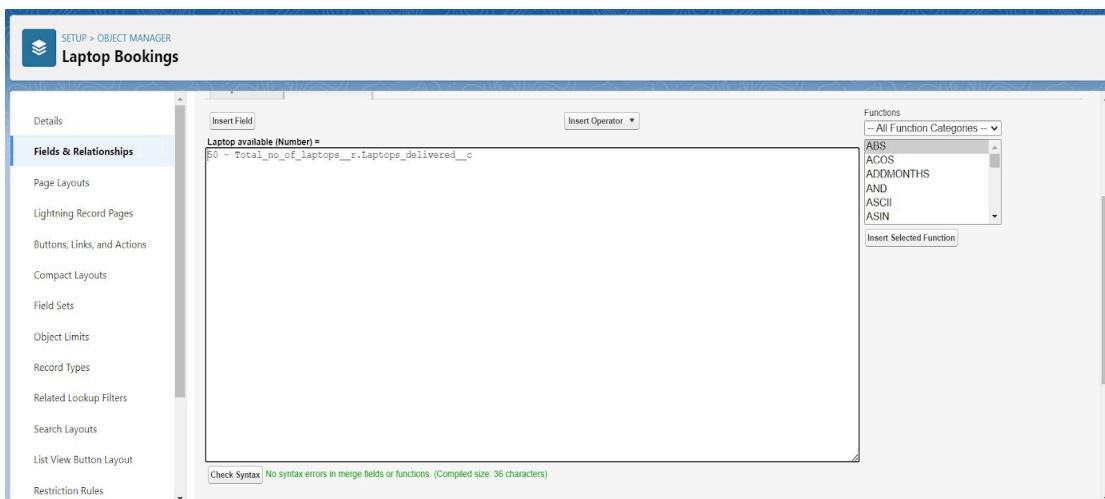
Go to setup >> click on Object Manager >> type object name(Laptop Booking) in the search bar >> click on the object.

Now click on “Fields & Relationships” >> New

Select Data type as a “Formula” and Click on Next

Fill the Above as following:

- Field Label: Laptops Available
- Field Name : It's gets auto generated
- Select the Formula Return Type as “Number”
- Select the Decimal places as “0” and Click on Next
- Click on the Advanced Formula and Enter the value in formula box “50 - ” and Click on insert field than you will find a pop window under the Laptop Booking select the Total No Of Laptops in the second Column and select the Laptops delivered in the third column and click on insert
- “50 - Total_no_of_laptops__r.Laptops_delivered__c” and Check Syntax



- Click on Next >> Next >> Save and new

To create fields in an object:

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

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

Picklist values are 1.2.3.4.5

Click and save it.

Creation of Fields & Relationship for Billing Process Object

1. To create fields & relationship to an object:

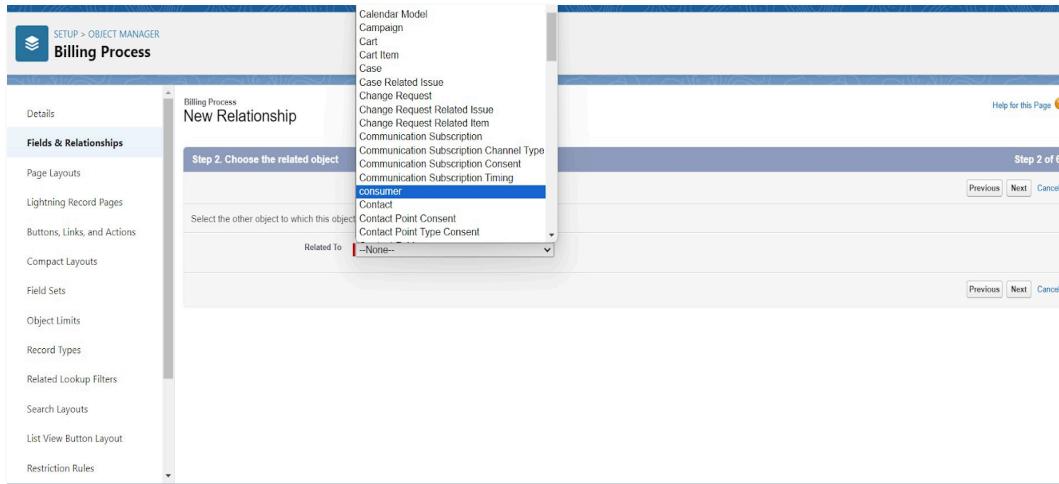
Go to setup >> click on Object Manager >> type object name(Billing Process) in the search bar >> click on the object.

Now click on “Fields & Relationships” >> New

Select Data Type as a “Master-detail Relationship”

Click on Next

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:

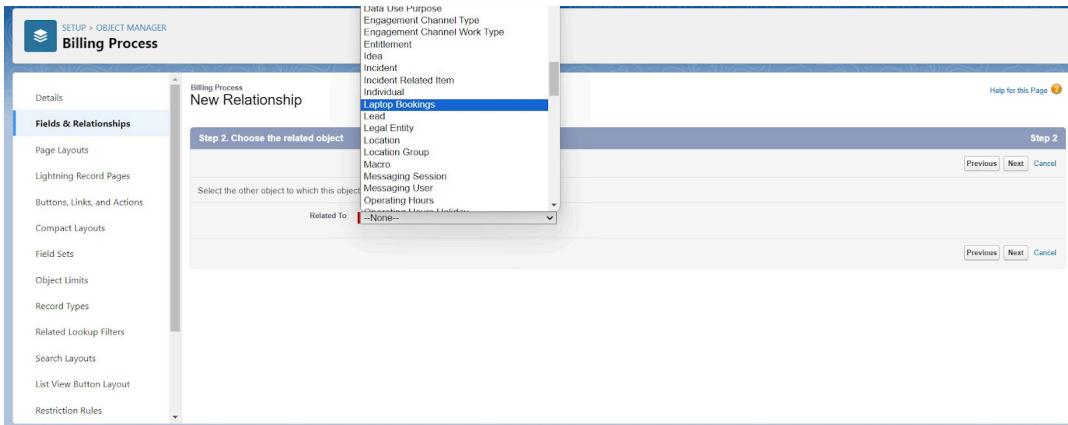
Go to setup >> click on Object Manager >> type object name(Billing Process) in the search bar >> click on the object.

Now click on “Fields & Relationships” >> New

Select Data Type as a “Lookup Relationship”

Click on Next

Click on the Related to drop down and Select the Laptop Booking object and click on Next



Fill the Above as following:

Change the Field Label: Laptop Booking

Field Name :It's gets auto generated

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

3. 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: Payment Mode

Value >> Select enter values with each value separated by a new line

- Cash
- Check
- Credit card
- Debit card
- UPI
- Phonepe
- Gpay
- Paytm

- Select required

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

Cross Object Formula Field:

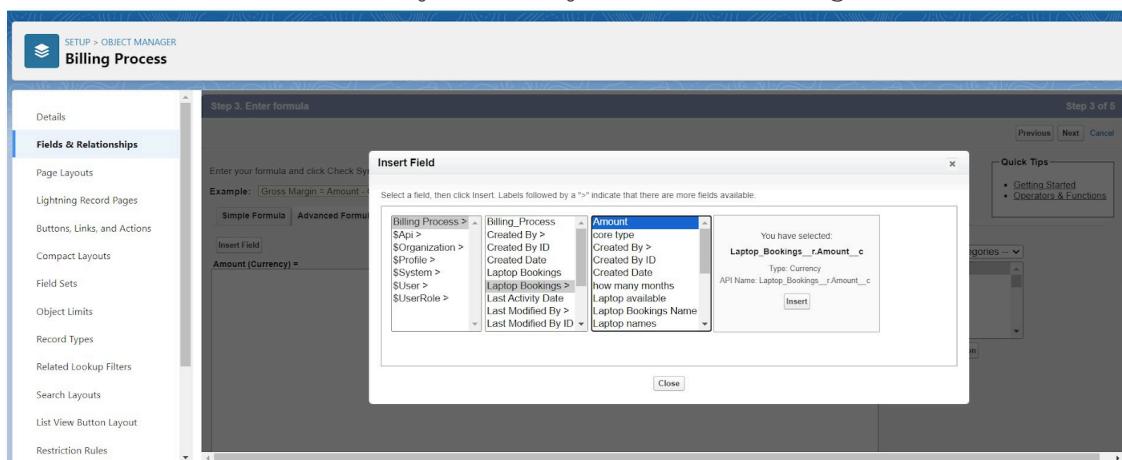
In Salesforce, a cross-object formula field allows you to create a formula that references fields from related objects. It enables you to perform calculations or display data from related records without the need for custom code or complex workflows.

Why do we need to create the Cross Object Formula Field:

If we want to get the Particular field from another object in that case we will use the Cross object Formula field. For that First we need to create the relationship b/w two objects and relate the field with formula data type.

4. Create a Cross object formula Field in billing process Object

- a. Go to setup >> click on Object Manager >> type object name(Billing Process) in the search bar >> click on the object.
- b. Now click on “Fields & Relationships” >> New
- c. Select Data Type as a “Formula”
- d. Click on Next
- e. Enter the Field label: Amount, the Field name gets auto generated and click on Next.(Formula return type Currency).
- f. In the Advanced Formula Click on the Insert field in the popup Screen Select the Billing Process and in the second drop down select the Laptop Booking and in the three drop down select the Amount field and click on Insert
- g. “Laptop_Booking__r.Amount__c”.
- h. Click on the Check syntax: No syntax errors in merge fields



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

Fields Created in Billing Process:

The screenshot shows the Salesforce Object Manager interface for the 'Billing Process' object. On the left, a sidebar lists various setup categories like Page Layouts, Lightning Record Pages, and Field Sets. The main area is titled 'Fields & Relationships' and displays a table of seven fields. The fields are:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Currency)		
Billing Process Name	Name	Text(80)		✓
Created By	CreatedBy	Lookup(User)		
Laptop Booking	Laptop_Booking__c	Lookup(Laptop Bookings)		✓
Last Modified By	LastModifiedBy	Lookup(User)		
Name	Name__c	Master-Detail(consumer)		✓
Payment Mode	Payment_Mode__c	Picklist		

Validation rule:

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.
6. Save the validation rule.

Created validation rule in consumer:

Field	Value
Rule Name	Phonenumberoremailblankrule
Error Condition Formula	OR(ISBLANK(Phone_number__c), ISBLANK(Email__c))
Error Message	please fill the phone number and email id
Description	phone number and email number should not be blank
Created By	yamuna_b, 29/11/2024, 12:45 pm
Active	<input checked="" type="checkbox"/>
Error Location	Top of Page
Modified By	yamuna_b, 30/12/2024, 8:52 pm

Profiles:

owner Profile

To create a new profile:

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

Profile Detail

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

Page Layouts

Standard Object Layouts	Global	Object Milestone
Global	Global Layout [View Assignment]	Object Milestone Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Operating Hours Layout [View Assignment]
Home Page Layout	DE Default [View Assignment]	Opportunity Layout [View Assignment]
Account	Account Layout [View Assignment]	Opportunity Product Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Order Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]	Order Product Layout [View Assignment]

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

Custom Object Permissions

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: --None--

Password Policies

3. Give Access and Save it.

Agent Profile

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

in the below diagram.

The screenshot shows the 'Profiles' setup page. It includes sections for 'Contact Form Consents', 'Scheduling Channels', and 'Custom Object Permissions' for 'Billing Process' and 'consumers'. There are also 'Session Settings' and 'Password Policies' sections.

	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"/>	<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"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4. Give access and save it.

Roles and Hierarchy:

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.

The screenshot shows the 'Your Organization's Role Hierarchy' page. The 'Expand All' button is highlighted with a red box. A new 'Add Role' button is being created under the 'CEO' role, also highlighted with a red box. The hierarchy tree includes 'Nick Enterprises', 'CEO', 'Manager', 'On Site Emp', 'Remote Emp', and 'HR'.

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

Role Edit
New Role

Help for this Page ?

Role Edit

Label: owner

Role Name: owner

This role reports to: CEO

Role Name as displayed on reports:

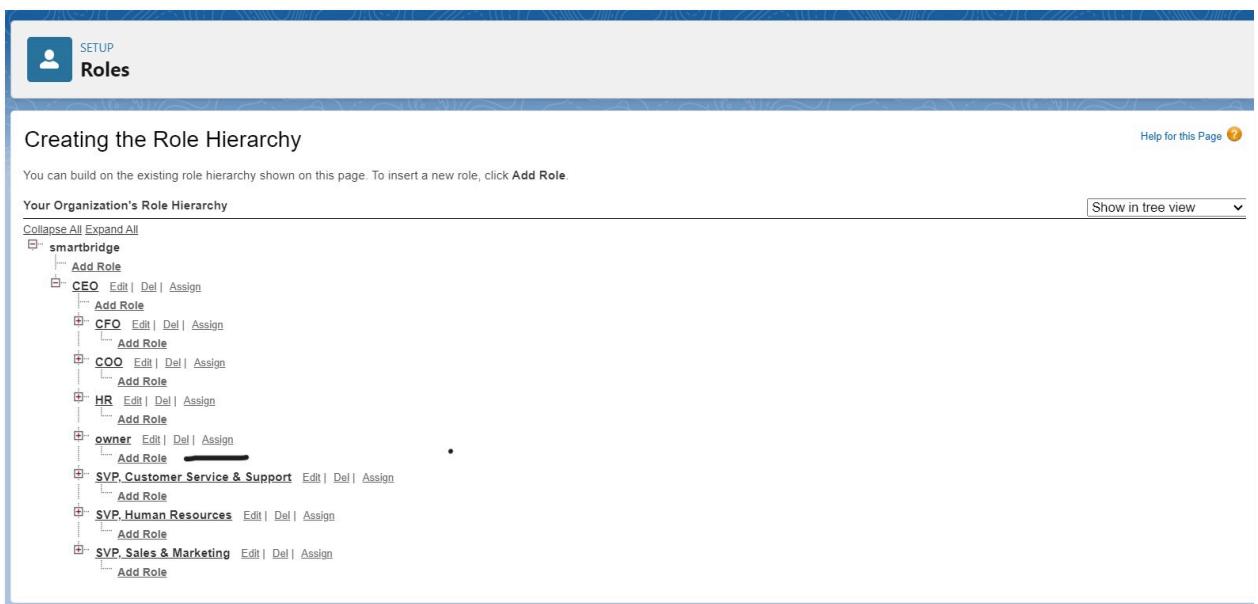
Save Save & New Cancel

- Click and save it.

Activity 2: Creating Agent roles

Creating another two roles under Owner

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

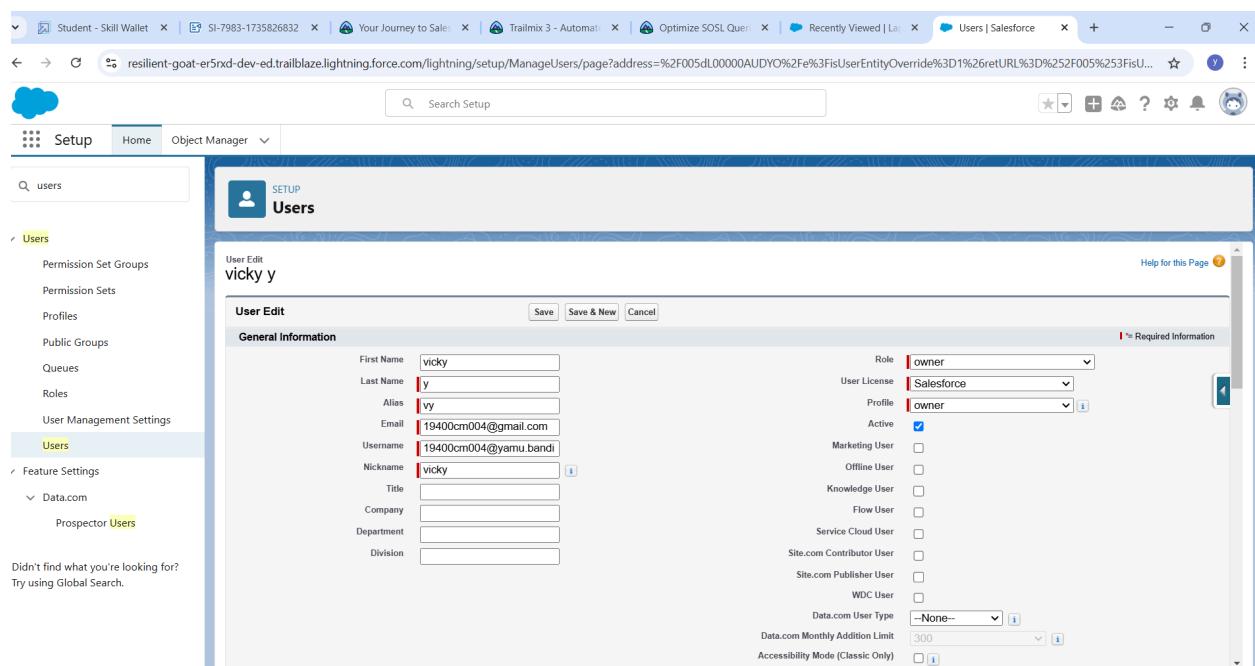


- 3.
4. Give Label as "Agent" and Role name gets auto populated. Then click on Save.

User

Create User:

1. Go to setup - type users in quick find box - select users -click New user.
2. Fill in the fields
3. First Name : vicky
4. Last Name : y
5. Alias : Give a Alias Name
6. Email id : 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.



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.

Search Setup

Setup Home Object Manager

Users

User Edit

General Information

First Name: ram
Last Name: ram
Alias: rram
Email: 19400cm004@gmail.com
Username: 19400cm004@yamu.bandit
Nickname: ram
Title:
Company:
Department:
Division:

Role: Agent
User License: Salesforce Platform
Profile: Agent
Active:

Marketing User
Offline User
Knowledge User
Flow User
Service Cloud User
Site.com Contributor User
Site.com Publisher User
WDC User
Data.com User Type: None
Data.com Monthly Addition Limit: 300
Accessibility Mode (Classic Only)
High-Contrast Palette on Charts

Search Setup

Setup Home Object Manager

Users

User Edit

General Information

First Name: ram
Last Name: ram
Alias: rram
Email: 19400cm004@gmail.com
Username: 19400cm004@yamu.bandit
Nickname: ram
Title:
Company:
Department:
Division:

Role: Agent
User License: Salesforce Platform
Profile: Agent
Active:

Additional Information

Street: vamakunta
City: NTR
Zip/Postal Code: 521325
State/Province: Andhra Pradesh
Country: India

Single Sign On Information

Federation ID:

Locale Settings

Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)
Locale: English (India)
Language: English

Approver Settings

Delegated Approver:
Manager:
Receive Approval Request Emails: Only if I am an approver
 Generate new password and notify user immediately

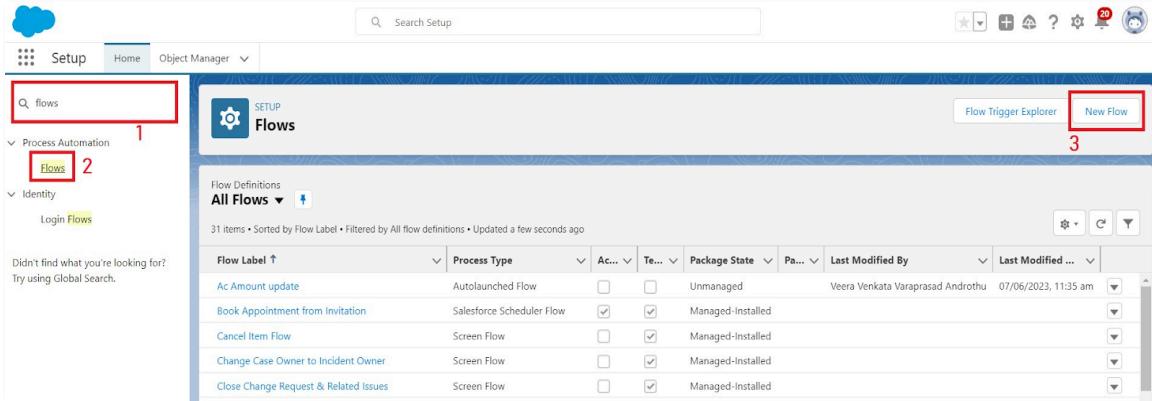
13. Save it.

Flows:

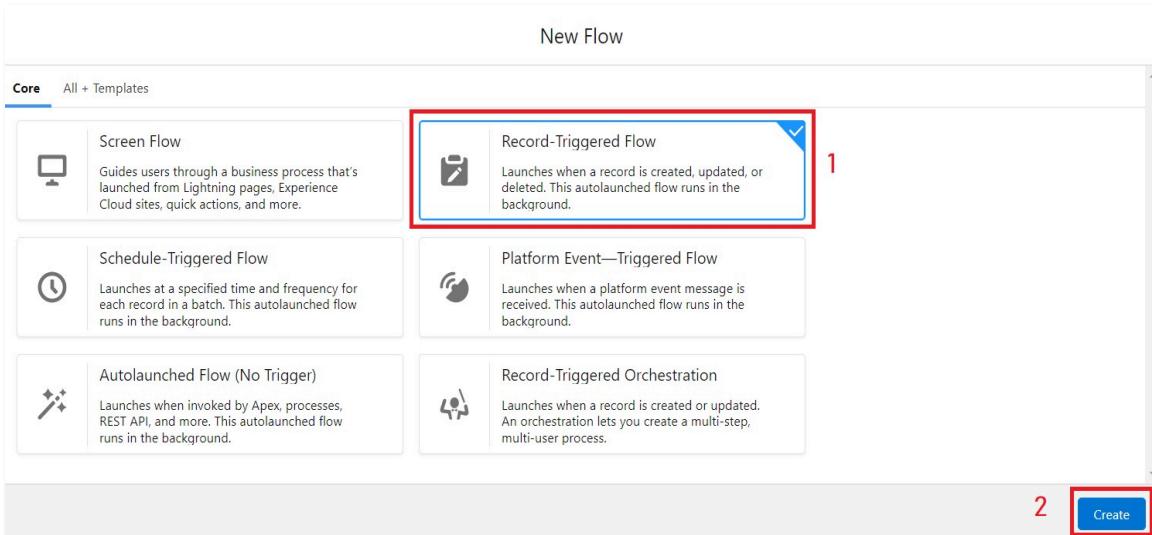
Create a Flow on dell laptop:

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.

Configure Start

Select Object

Select the object whose records trigger the flow when they're created, updated, or deleted.

* Object
Laptop Bookings

Configure Trigger

* Trigger the Flow When:

- A record is created
- A record is updated
- A record is created or updated
- A record is deleted

Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Cancel Done

Configure Start

Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements
None

* Optimize the Flow for:

Fast Field Updates

Update fields on the record that triggers the flow to run. This high-performance flow runs *before* the record is saved to the database.

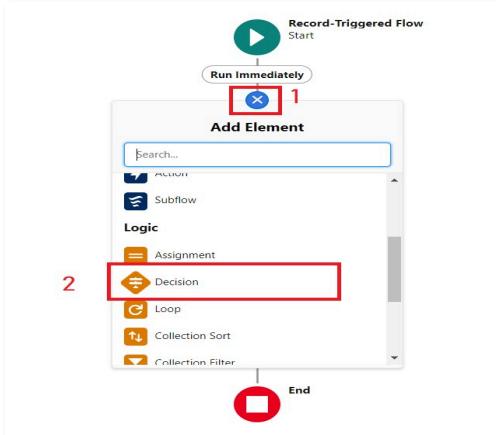
Actions and Related Records

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

Include a Run Asynchronously path to access an external system after the original transaction for the triggering record is successfully committed

Cancel Done

Under the Record-triggered Flow Click on “+” Symbol and In the Drop down List select the “Decision Element”.



7. Enter the Details Label: Field should be Update, API name: Gets Automatically Generated.
8. Enter the Outcome Details Label: dell , Outcome API name: Gets Automatically Generated.
 - Resource: Select \$Record.Laptop_name__c.
 - Operator: Select Equals.
 - Value: Select dell
 - Add the same outcome order to acer , hp, mac.
 - Rename Default outcome as False
 - Click done.

Edit Decision

*Label	*API Name
field should updated	field_should_updated

Description

the field should be automatically updated

Outcomes For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

OUTCOME ORDER	OUTCOME DETAILS	DELETE OUTCOME
dell	*Label: dell *Outcome API Name: dell Condition Requirements to Execute Outcome: All Conditions Are Met (AND)	Delete Outcome
acer		
hp		
mac		
false	Resource: \$Record > Laptop names Operator: Equals Value: Dell	Cancel Done

10.Go to flow page

11. Beside dell there is a symbol '+' click on that.
12. Again select decision

13. Enter the Details Label: Field should Update(any one u want), API name: Gets Automatically Generated.

14. select the Outcome Details Label: dell core i3 , Outcome API name: Gets Automatically Generated.

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

15. select the Outcome '+' Details Label: dell core i5 , Outcome API name: Gets Automatically Generated.

- Resource: Select Record.core type.
- Operator: Select Equals.
- Value: Select core i5.
- Then again click the symbol '+' outcome details

16. Enter the Outcome Details Label: dell core i7 , Outcome API name: Gets Automatically Generated.

- Resource: Select Record.core type.
- Operator: Select Equals.
- Value: Select core i7.

17. Click done.

Edit Decision

*Label field updated	*API Name field_updated
Description	
Outcomes For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.	
OUTCOME ORDER 1 +	OUTCOME DETAILS
dell core i3	*Label dell core i3
dell core i5	*Outcome API Name dellcore_i3
dell core i7	Condition Requirements to Execute Outcome All Conditions Are Met (AND)
Default Outcome	Resource {\$Record > core type X} Operator Equals Value core i3
Cancel Done	

18. So go to the flow page select '+' after core i3 then again select the decision.

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

Generated.

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

21.

- Resource: Select Record.how many months.
- Operator: Select Equals.
- Value: 1.

23. Enter the Outcome Details Label: dell 2(i3) , Outcome API name: Gets Automatically Generated.

- Resource: Select Record.how many months.
- Operator: Select Equals.
- Value: Select 2..

24. Click '+' outcome details

25. Enter the Outcome Details Label: dell 3(i3) , Outcome API name: Gets Automatically Generated.

- Resource: Select Record.how many months.
- Operator: Select Equals.
- Value: Select 3..

26. Click '+' outcome details

27. Enter the Outcome Details Label: dell 4(i3) , Outcome API name: Gets Automatically Generated.

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

28. Click '+' outcome details

29. Enter the Outcome Details Label: dell 5(i3) , Outcome API name: Gets Automatically Generated.

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

Edit Decision

*Label months selected	*API Name months_selected																		
Description																			
<p>Outcomes For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.</p> <table border="1"> <thead> <tr> <th>OUTCOME ORDER</th> <th>OUTCOME DETAILS</th> <th>Delete Outcome</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>*Label 1 Condition Requirements to Execute Outcome All Conditions Are Met (AND)</td> <td>X1</td> </tr> <tr> <td>2</td> <td></td> <td></td> </tr> <tr> <td>3</td> <td></td> <td></td> </tr> <tr> <td>4</td> <td></td> <td></td> </tr> <tr> <td>5</td> <td>Resource \$Record > how many months Operator Equals Value 1</td> <td></td> </tr> </tbody> </table>		OUTCOME ORDER	OUTCOME DETAILS	Delete Outcome	1	*Label 1 Condition Requirements to Execute Outcome All Conditions Are Met (AND)	X1	2			3			4			5	Resource \$Record > how many months Operator Equals Value 1	
OUTCOME ORDER	OUTCOME DETAILS	Delete Outcome																	
1	*Label 1 Condition Requirements to Execute Outcome All Conditions Are Met (AND)	X1																	
2																			
3																			
4																			
5	Resource \$Record > how many months Operator Equals Value 1																		
<input type="button" value="Cancel"/> <input type="button" value="Done"/>																			

30. Follow the above picture you will understand.
31. After dell 1(i3) there is '+' symbol like dell 2(i3),dell 3(i3),dell 4(i3),dell 5(i3).
32. Click on '+' then select update records for each and every outcome.
33. Enter the Details Label: one month of dell i3 rate , API name: Gets Automatically Generated. Enter label name in a similar way for other update records.
34. Field:- Amount_c , value:- for dell 1(i3)-1000, dell 2(i3)-2000, dell 3(i3)-3000, dell 4(i3)-4000, dell 5(i3)-5000. Follow all these finally and update the Amount field value based on the number of months.
- 35.
36. Click done.

37. Enter the Details Label: months selected , API name: Gets Automatically Generated.
38. Enter the Outcome Details Label: dell 1(i7) , Outcome API name: Gets Automatically Generated.
39.
 - Resource: Select Record.how many months.
 - Operator: Select Equals.
 - Value: 1.
40. Enter the Outcome Details Label: dell 2(i7) , Outcome API name: Gets

Automatically Generated.

- Resource: Select Record.how many months.
- Operator: Select Equals.
- Value: Select 2..

41. Click '+' outcome details

42. Enter the Outcome Details Label: dell 3(i7) , Outcome API name: Gets Automatically Generated.

- Resource: Select Record.how many months.
- Operator: Select Equals.
- Value: Select 3..

43. Click '+' outcome details

44. Enter the Outcome Details Label: dell 4(i7) , Outcome API name: Gets Automatically Generated.

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

45. Click '+' outcome details

46. Enter the Outcome Details Label: dell 5(i7) , Outcome API name: Gets Automatically Generated.

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

Edit Decision

*Label months selected	*API Name months_selected																		
Description <div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div>																			
Outcomes For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.																			
OUTCOME ORDER i +	<table border="1"><thead><tr><th colspan="3">OUTCOME DETAILS</th></tr></thead><tbody><tr><td style="width: 30%; padding: 5px;">*Label 1</td><td style="width: 30%; padding: 5px;">*Outcome API Name X1</td><td style="width: 40%; padding: 5px; text-align: right;">Delete Outcome</td></tr><tr><td colspan="3" style="padding: 5px;">Condition Requirements to Execute Outcome All Conditions Are Met (AND)</td></tr><tr><td colspan="3" style="padding: 5px; border-top: none;"><table border="1"><thead><tr><th style="width: 33%;">Resource</th><th style="width: 33%;">Operator</th><th style="width: 33%;">Value</th></tr></thead><tbody><tr><td style="padding: 5px;">\$Record > how many months</td><td style="padding: 5px;">Equals</td><td style="padding: 5px;">1</td></tr></tbody></table></td></tr></tbody></table>	OUTCOME DETAILS			*Label 1	*Outcome API Name X1	Delete Outcome	Condition Requirements to Execute Outcome All Conditions Are Met (AND)			<table border="1"><thead><tr><th style="width: 33%;">Resource</th><th style="width: 33%;">Operator</th><th style="width: 33%;">Value</th></tr></thead><tbody><tr><td style="padding: 5px;">\$Record > how many months</td><td style="padding: 5px;">Equals</td><td style="padding: 5px;">1</td></tr></tbody></table>			Resource	Operator	Value	\$Record > how many months	Equals	1
OUTCOME DETAILS																			
*Label 1	*Outcome API Name X1	Delete Outcome																	
Condition Requirements to Execute Outcome All Conditions Are Met (AND)																			
<table border="1"><thead><tr><th style="width: 33%;">Resource</th><th style="width: 33%;">Operator</th><th style="width: 33%;">Value</th></tr></thead><tbody><tr><td style="padding: 5px;">\$Record > how many months</td><td style="padding: 5px;">Equals</td><td style="padding: 5px;">1</td></tr></tbody></table>			Resource	Operator	Value	\$Record > how many months	Equals	1											
Resource	Operator	Value																	
\$Record > how many months	Equals	1																	
Cancel	Done																		

47. Follow the above picture you will understand.

48. After dell 1(i7) there is '+' symbol like dell 2(i7),dell 3(i7),dell 4(i7),dell 5(i7).

49. Click on '+' then select update records

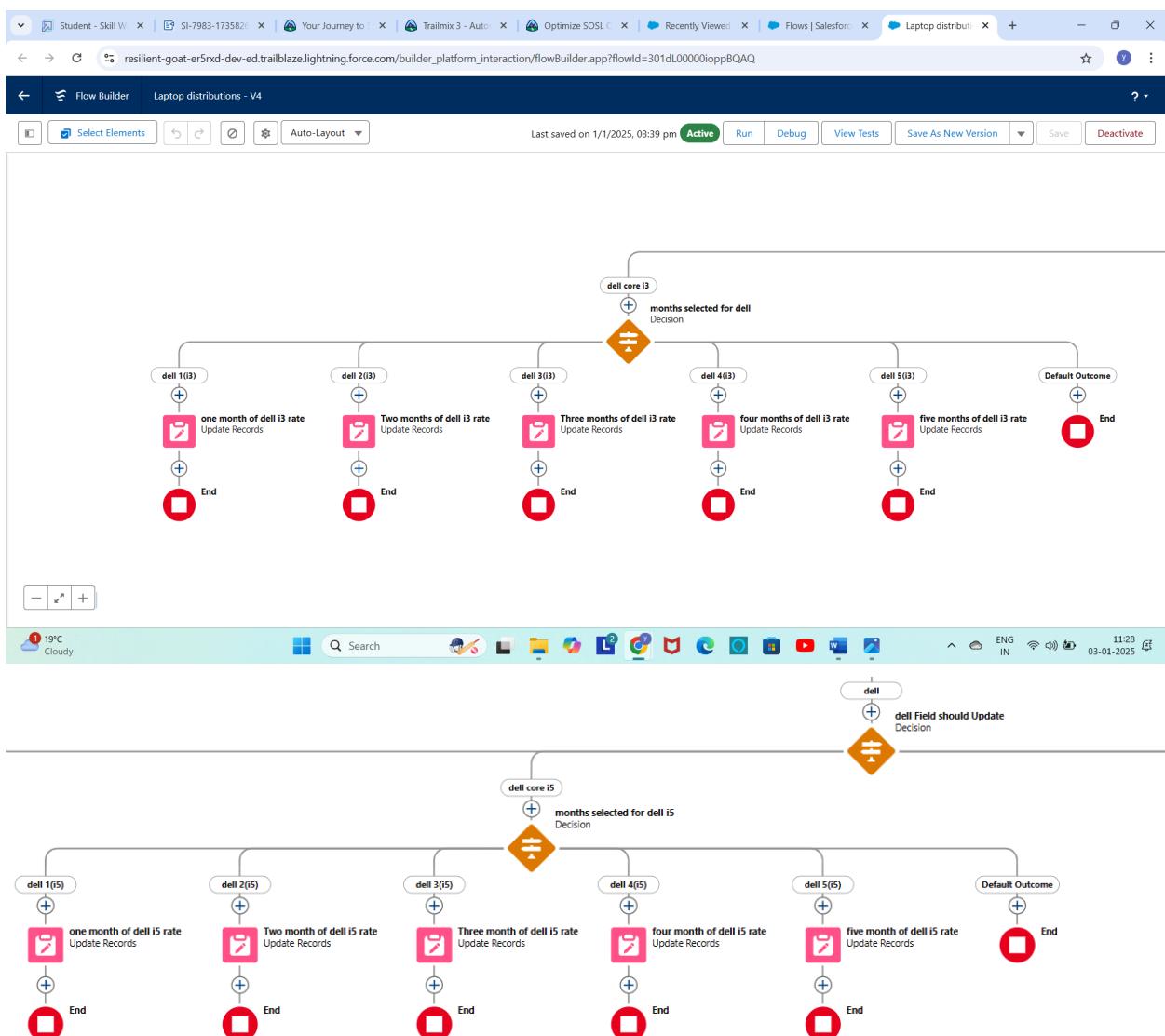
50. Enter the Details Label: one month of dell i5 rate , API name: Gets Automatically Generated.

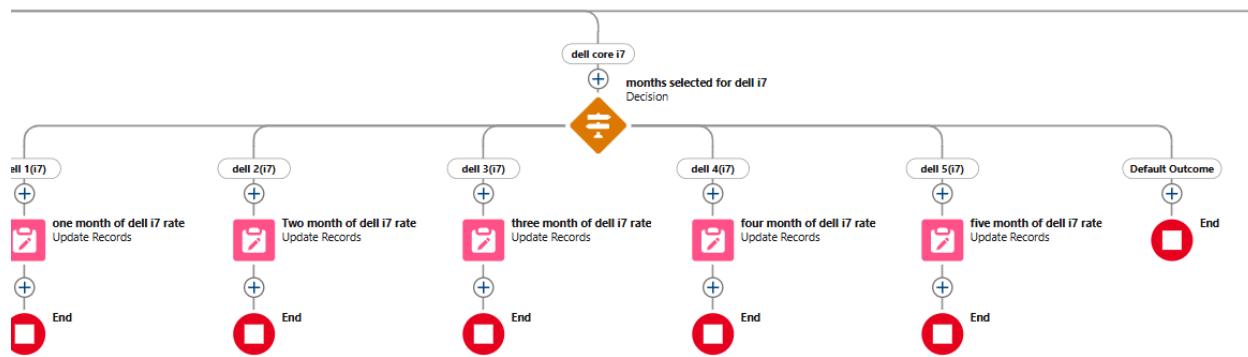
51. Field:- Amount__c , value:- for dell 1(i7)-2000, dell 2(i7)-4000, dell 3(i7)-6000, dell 4(i7)-8000, dell 5(i7)-10000. Follow for all these finally

52. Click done.

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

Flow created on Dell laptop:





Over all dell Laptop flow:



creating flow on acer laptop

- Go to flow page
- Beside acer there is a symbol '+' click on that.
- Again select decision
- Enter the Details Label: Acer core type selection, API name: Gets Automatically Generated.
- Select the Outcome Details Label: acer core i3 , Outcome API name: Gets Automatically Generated.
 - Resource: Select Record.core type.
 - Operator: Select Equals.
 - Value: Select core i3.
- Similarly create outcomes for acer core i5 and acer core i7 also.

Edit Decision

Outcomes For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

OUTCOME ORDER	OUTCOME DETAILS	Delete Outcome
acer core i3	*Label acer core i3	*Outcome API Name acer_core_i3
acer core i5		
acer core i7		
Default Outcome		
Condition Requirements to Execute Outcome All Conditions Are Met (AND)		
Resource: \$Record > core type Operator: Equals Value: core i3		
+ Add Condition		
When to Execute Outcome <input checked="" type="radio"/> If the condition requirements are met <input type="radio"/> Only if the record that triggered the flow to run is updated to meet the condition requirements		
		Cancel Done

Click done.

- a. Go to flow page
- a. Beside dell there is a symbol '+' click on that.
- b. Again select decision
- a. Enter the Details Label: Acer months selected , API name: Gets Automatically Generated.
- b. Enter the Outcome Details Label: acer 1(i3) , Outcome API name: Gets Automatically Generated.
- c.
 - Resource: Select Record.how many months.
 - Operator: Select Equals.
 - Value: 1.
- a. Enter the Outcome Details Label: acer 2(i3) , Outcome API name: Gets Automatically Generated.
- Resource: Select Record.how many months.
- Operator: Select Equals.
- Value: Select 2..
- a. Click '+' outcome details
- b. Enter the Outcome Details Label: acer 3(i3) , Outcome API name: Gets Automatically Generated.

- Resource: Select Record.how many months.
- Operator: Select Equals.
- Value: Select 3..
- a. Click '+' outcome details
- b. Enter the Outcome Details Label: acer 4(i3) , Outcome API name: Gets Automatically Generated.
- Resource: Select Record.how many months.
- Operator: Select Equals.
- Value: Select 4.
- a. Click '+' outcome details
- b. Enter the Outcome Details Label: acer 5(i3) , Outcome API name: Gets Automatically Generated.
- Resource: Select Record.how many months.
- Operator: Select Equals.
- Value: Select 5.

Edit Decision

*Label acer months selected	*API Name acer_months_selected																								
Description 																									
Outcomes For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.																									
OUTCOME ORDER (+) +	OUTCOME DETAILS <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> Delete Outcome <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 20%; padding: 5px;"># acer 1(i3)</td> <td style="width: 40%; padding: 5px;">*Label acer 1(i3)</td> <td style="width: 40%; padding: 5px;">*Outcome API Name acer_1_i3</td> </tr> <tr> <td colspan="3" style="padding: 5px;">Condition Requirements to Execute Outcome All Conditions Are Met (AND)</td> </tr> <tr> <td colspan="3" style="padding: 5px;"> Resource Operator Value <input type="text" value="\$Record > how many months"/> <input type="text" value="Equals"/> <input type="text" value="1"/> </td> </tr> </table> </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 20%; padding: 5px;"># acer 2(i3)</td> <td style="width: 40%; padding: 5px;"></td> <td style="width: 40%; padding: 5px;"></td> </tr> <tr> <td colspan="3" style="padding: 5px;"></td> </tr> <tr> <td># acer 3(i3)</td> <td></td> <td></td> </tr> <tr> <td># acer 4(i3)</td> <td></td> <td></td> </tr> <tr> <td># acer 5(i3)</td> <td></td> <td></td> </tr> </table> </div>	# acer 1(i3)	*Label acer 1(i3)	*Outcome API Name acer_1_i3	Condition Requirements to Execute Outcome All Conditions Are Met (AND)			Resource Operator Value <input type="text" value="\$Record > how many months"/> <input type="text" value="Equals"/> <input type="text" value="1"/>			# acer 2(i3)						# acer 3(i3)			# acer 4(i3)			# acer 5(i3)		
# acer 1(i3)	*Label acer 1(i3)	*Outcome API Name acer_1_i3																							
Condition Requirements to Execute Outcome All Conditions Are Met (AND)																									
Resource Operator Value <input type="text" value="\$Record > how many months"/> <input type="text" value="Equals"/> <input type="text" value="1"/>																									
# acer 2(i3)																									
# acer 3(i3)																									
# acer 4(i3)																									
# acer 5(i3)																									
Cancel Done																									

Click done.

- a. After acer 1(i3) there is '+' symbol like acer 2(i3),acer 3(i3),acer 4(i3),acer 5(i3).
- b. Click on '+' then select update records
- c. Enter the Details Label: one month of acer i3 rate , API name: Gets Automatically Generated.
- d. Field:- Amount__c , value:- for acer 1(i3)-900, acer 2(i3)-1800, acer 3(i3)-

2700, acer 4(i3)-3600, acer 5(i3)-4800. Follow for all these finally

- e. **Follow the steps from 8 to 22 and create decision and Update record elements for Acer core i5 and Acer core i7. But enter different Amount values.**

Edit Update Records

one month of acer i3 rate (one_month_of_acer_i3_rate)

* How to Find Records to Update and Set Their Values

Use the laptop bookings record that triggered the flow

Update records related to the laptop bookings record that triggered the flow

Use the IDs and all field values from a record or record collection

Specify conditions to identify records, and set fields individually

Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record

Set Field Values for the Laptop Bookings Record

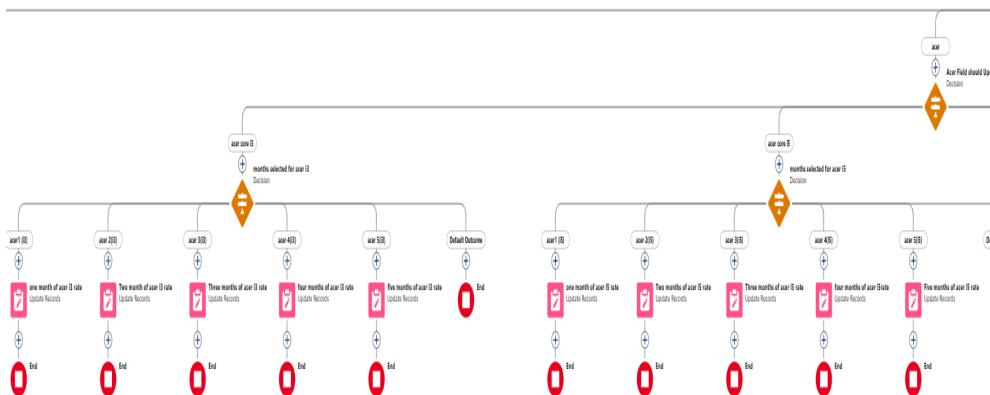
Field	Value
Amount_c	900

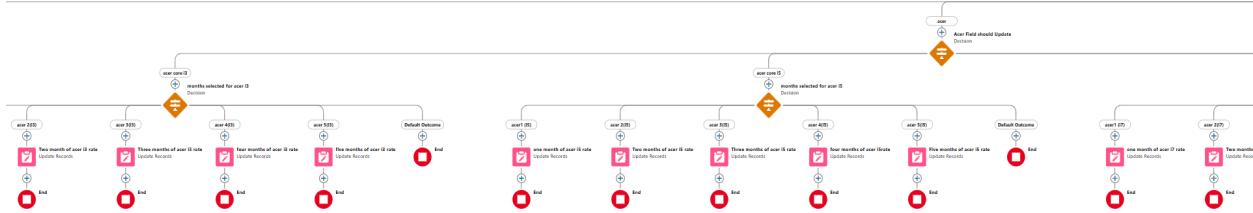
+ Add Field

Cancel Done

- f. Click done

Flows Completed on acer Laptop:





creating a flow on hp laptop:

Go to flow page

1.
 - a. Beside hp there is a symbol '+' click on that.
 - b. Again select decision
 - c. Enter the Details Label: HP core selection, API name: Gets Automatically Generated.
 - d. select the Outcome Details Label: hp core i3 , Outcome API name: Gets Automatically Generated.
 - Resource: Select Record.core type.
 - Operator: Select Equals.
 - Value: Select hp i3.
2.
 - a. Similarly create outcomes for hp core i5 and hp core i7 also.
 - b. Go to flow page
3.
 - a. Beside hp there is a symbol '+' click on that.
 - b. Again select decision
4.
 - a. Enter the Details Label: hp core i5 month selection , API name: Gets Automatically Generated.
 - b. Enter the Outcome Details Label: hp 1(i5) , Outcome API name: Gets Automatically Generated.
 - Resource: Select Record.how many months.
 - Operator: Select Equals.

- Value: 1.
- 5.
- a. Enter the Outcome Details Label: hp 2(i5) , Outcome API name: Gets Automatically Generated.
 - Resource: Select Record.how many months.
 - Operator: Select Equals.
 - Value: Select 2..
 - a. Click '+' outcome details
 - b. Enter the Outcome Details Label: hp 3(i5) , Outcome API name: Gets Automatically Generated.
 - Resource: Select Record.how many months.
 - Operator: Select Equals.
 - Value: Select 3..
 - a. Click '+' outcome details
 - b. Enter the Outcome Details Label: hp 4(i5) , Outcome API name: Gets Automatically Generated.
 - Resource: Select Record.how many months.
 - Operator: Select Equals.
 - Value: Select 4.
 - a. Click '+' outcome details
 - b. Enter the Outcome Details Label: hp 5(i5) , Outcome API name: Gets Automatically Generated.
 - Resource: Select Record.how many months.
 - Operator: Select Equals.
 - Value: Select 5.

Edit Decision

Outcomes For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

OUTCOME ORDER	OUTCOME DETAILS	Actions
hp core i3	*Label: hp core i3 *Outcome API Name: hp_core_i3 Condition Requirements to Execute Outcome: All Conditions Are Met (AND) Resource: \$Record > core type X, Operator: Equals, Value: core i3 + Add Condition	Delete Outcome
hp core i5		
hp core i7		
Default Outcome		

When to Execute Outcome

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

Buttons: Cancel, Done

6. Click on done.
7.
 - a. After hp 1(i5) there is '+' symbol like hp 2(i5), hp 3(i5), hp 4(i5),hp 5(i5).
 - b. Click on '+' then select update records
 - c. Enter the Details Label: one month of hp i5 rate , API name: Gets Automatically Generated.
 - d. Field:- Amount__c , value:- for hp 1(i5)-1700, hp 2(i5)-3400, hp 3(i5)-5100, hp 4(i5)-6800, hp 5(i5)-8500. Follow for all these finally
 - e. **Follow the steps from 8 to 22 and create decision and Update record elements for Hp core i3 and Hp core i7. But enter different Amount values**

Edit Update Records

one month of hp i5 rate (one_month_of_hp_i5_rate)

*** How to Find Records to Update and Set Their Values**

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

Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record

Set Field Values for the Laptop Bookings Record

Field	Value
Amount__c	1700

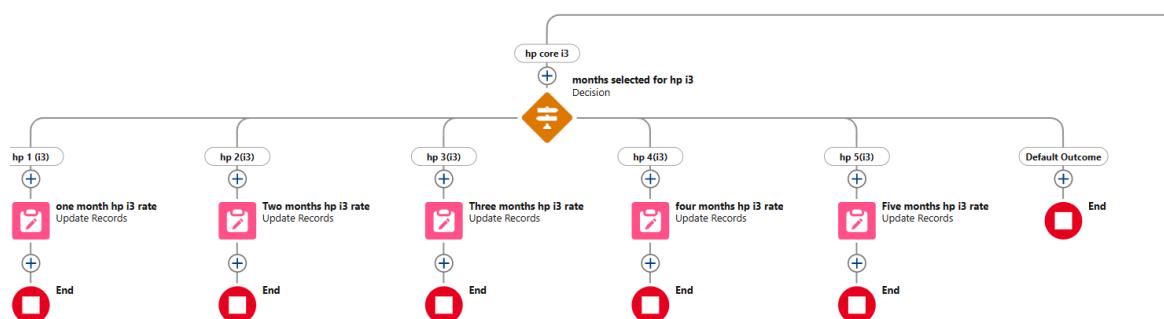
+ Add Field

Cancel **Done**

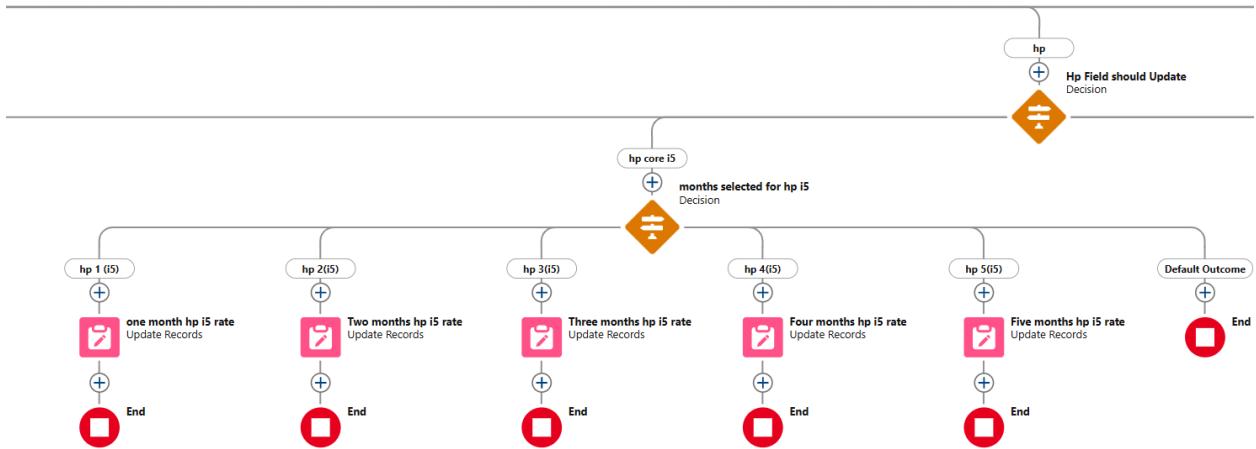
8. Click done.

Flows created on hp laptop with core types:

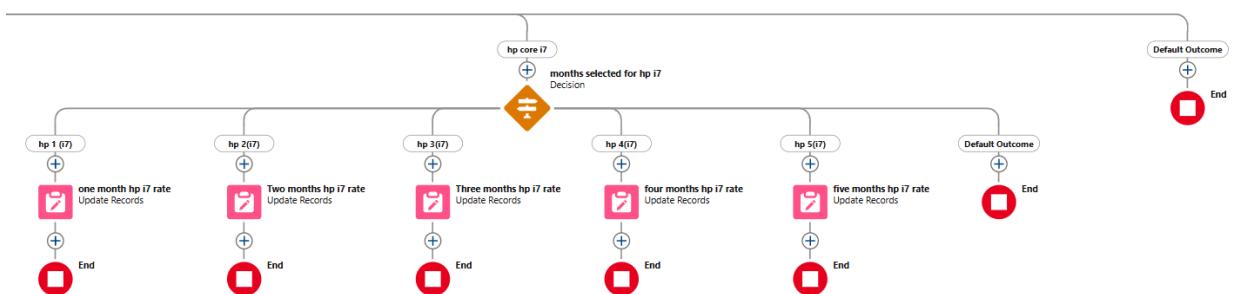
HP i3:



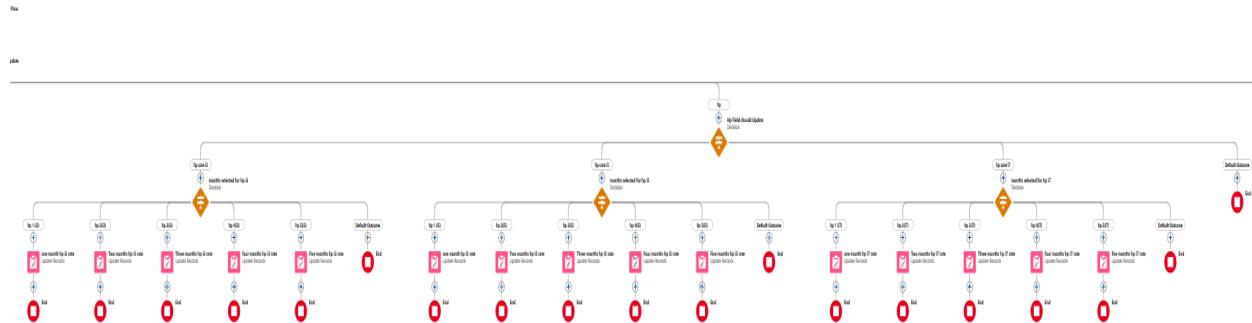
Hp i5:



HP i7:



Overall Flow on Hp:



creating a flow on mac laptop:

- Go to flow page
- Beside mac there is a symbol '+' click on that.
- Again select decision
- Enter the Details Label: mac should be Updated, API name: Gets Automatically Generated.
- select the Outcome Details Label: mac laptop , Outcome API name: Gets Automatically Generated.
 - Resource: Select Record.core type.
 - Operator: Select Equals.
 - Value: Select Bionic Chip.

Edit Decision

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

[Cancel](#) [Done](#)

Click done.

Go to flow page

- a. Beside Mac there is a symbol '+' click on that.
 - b. Again select decision
-
- a. Enter the Details Label: Mac months selected , API name: Gets Automatically Generated.
 - b. Enter the Outcome Details Label: mac bionic chip(1) , Outcome API name: Gets Automatically Generated.
 - c.
 - Resource: Select Record.how many months.
 - Operator: Select Equals.
 - Value: 1.
-
- a. Enter the Outcome Details Label: mac bionic chip(2) , Outcome API name: Gets Automatically Generated.
 - Resource: Select Record.how many months.
 - Operator: Select Equals.
 - Value: Select 2..
 - a. Click '+' outcome details
 - b. Enter the Outcome Details Label: mac bionic chip(3) , Outcome API name: Gets Automatically Generated.
 - Resource: Select Record.how many months.
 - Operator: Select Equals.
 - Value: Select 3..
 - a. Click '+' outcome details
 - b. Enter the Outcome Details Label: mac bionic chip(4) , Outcome API name: Gets Automatically Generated.
 - Resource: Select Record.how many months.
 - Operator: Select Equals.
 - Value: Select 4.
 - a. Click '+' outcome details
 - b. Enter the Outcome Details Label: mac bionic chip(5) , Outcome API name: Gets Automatically Generated.
 - Resource: Select Record.how many months.

- Operator: Select Equals.
- Value: Select 5.

Edit Decision

mac months selected (mac_months_selected)

Outcomes For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

OUTCOME ORDER	OUTCOME DETAILS	Delete Outcome
mac bionic chip(1)	*Label mac bionic chip(1)	*Outcome API Name mac_bionic_chip_1
mac bionic chip(2)		
mac bionic chip(3)		
mac bionic chip(4)		
mac bionic chip(5)		
Default Outcome		

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

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

+ Add Condition

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

Cancel Done

Click done.

- After mac bionic chip(1) there is '+' symbol like mac bionic chip(2), mac bionic chip(3), mac bionic chip(4),mac bionic chip(5).
- Click on '+' then select update records
- Enter the Details Label: one month of mac rate , API name: Gets Automatically Generated.
- Field:- Amount__c , value:- for one month of mac bionic chip rate-1700, two month of mac bionic chip rate-3400, three month of mac bionic chip rate-5100, four month of mac bionic chip rate-6800, five month of mac bionic chip rate-8500. Follow for all these finally

Click done.

Edit Update Records

* How to Find Records to Update and Set Their Values
 Use the laptop bookings record that triggered the flow
 Update records related to the laptop bookings record that triggered the flow
 Use the IDs and all field values from a record or record collection
 Specify conditions to identify records, and set fields individually

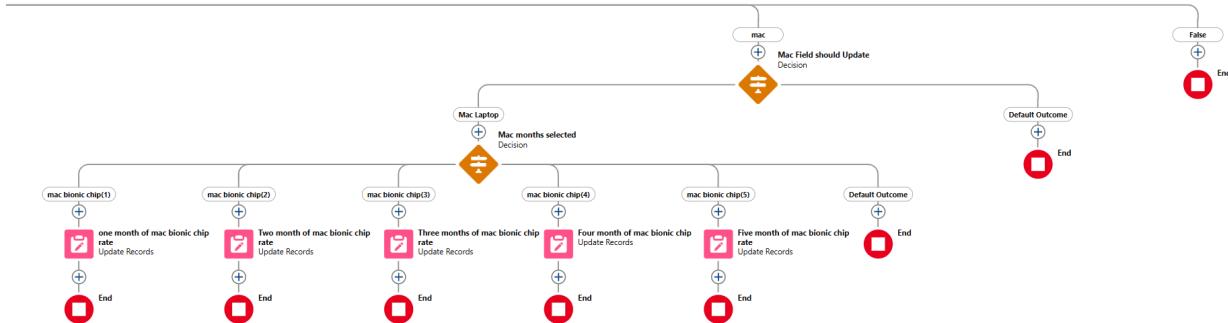
Set Filter Conditions
Condition Requirements to Update Record
None—Always Update Record

Set Field Values for the Laptop Bookings Record

Field	Value
Amount__c	2000

Cancel Done

FLOW on Mac Laptop:

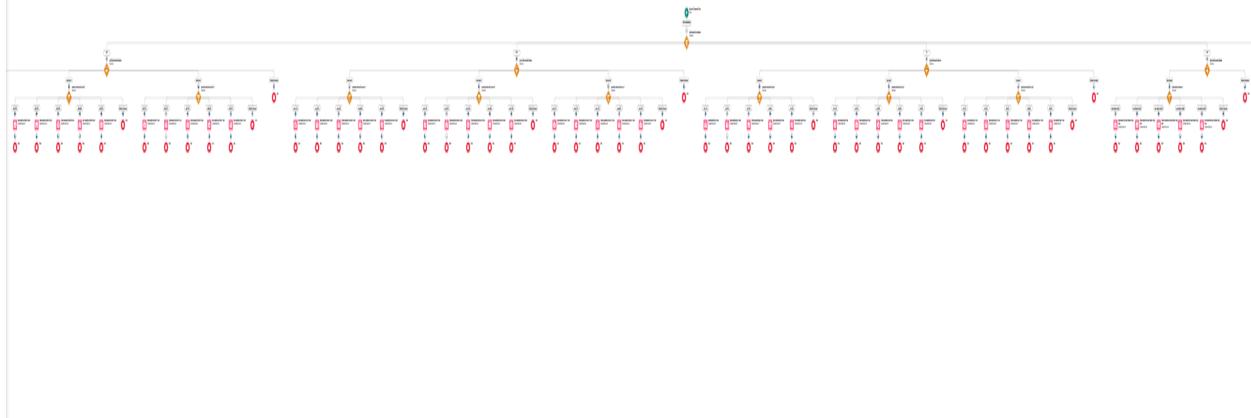


Click on save .

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

Save the flow and activate it.

Laptop Distribution Flow:

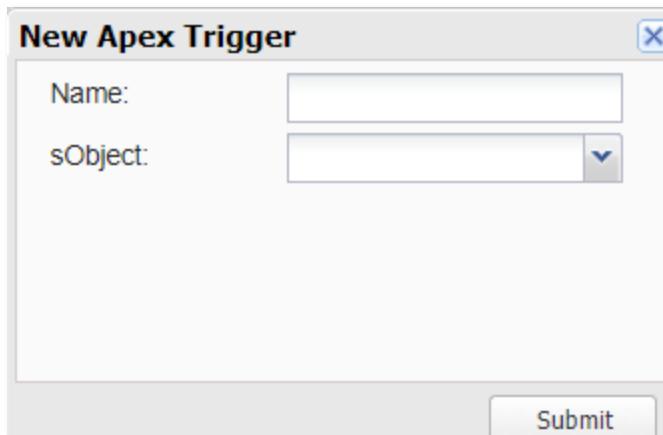
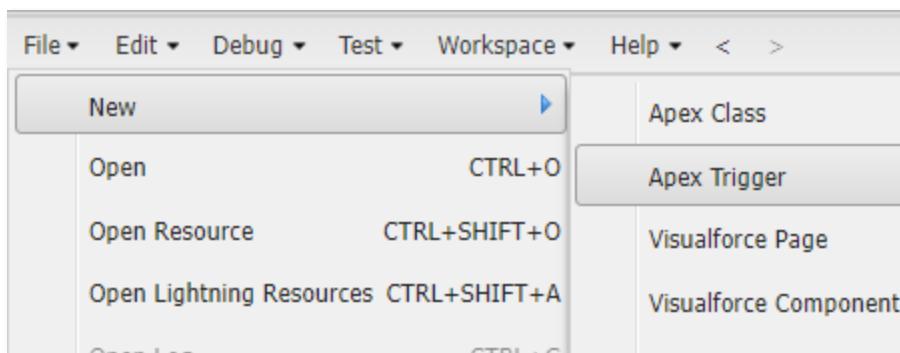


Apex:

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.



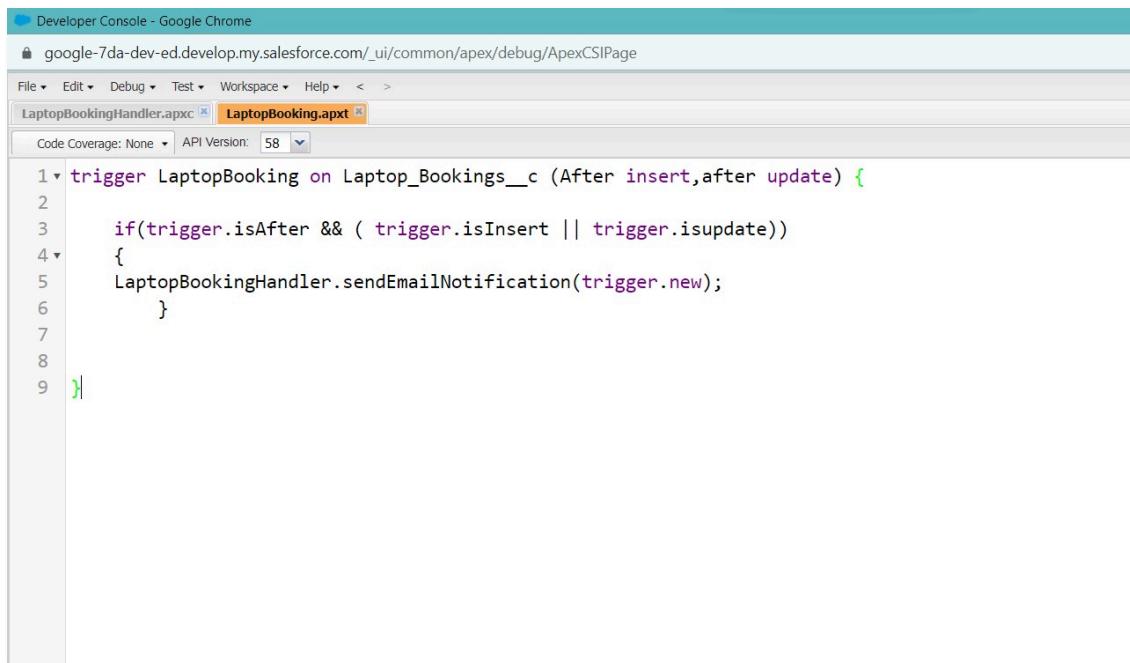
Syntax For creating trigger :

The syntax for creating trigger is :

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

{

```
}
```



The screenshot shows the Salesforce Developer Console in Google Chrome. The URL is google-7da-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage. The tabs at the top are 'LaptopBookingHandler.apxc' and 'LaptopBooking.apxt'. The code coverage is set to 'None' and the API version is '58'. The trigger code is displayed:

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

Trigger code:

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

    if(trigger.isAfter && ( trigger.isInsert || trigger.isupdate))
    {
        LaptopBookingHandler.sendEmailNotification(trigger.new);
    }

}
```

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).

Handler Class:

```

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

```

Logs Tests Checkpoints Query Editor View State Progress Problems

Name Line Problem

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).

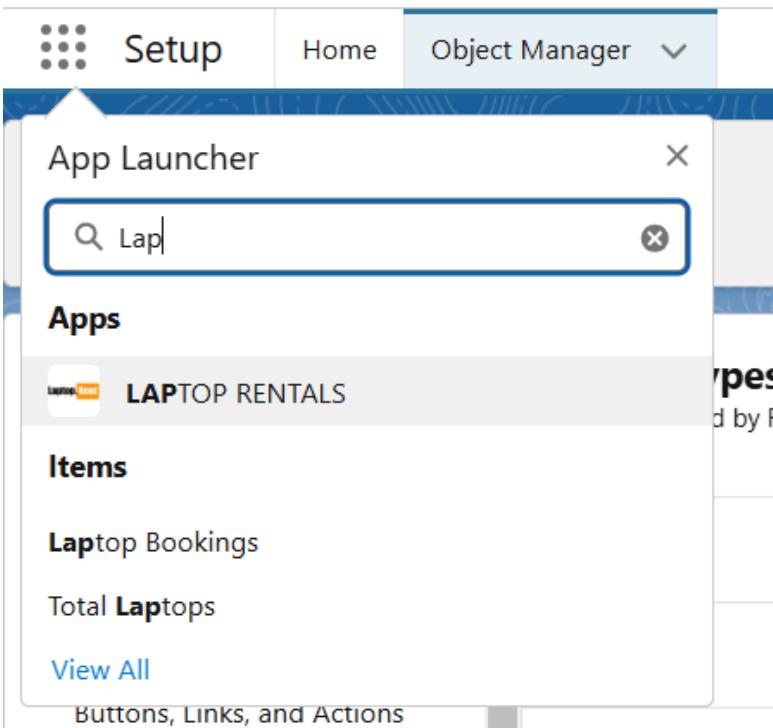
In this project , trigger is called whenever the particular record's sum exceeds the threshold i.e minimum business requirement value. Then the code in the trigger will get executed.

Reports:

Create Report

- 1. Note: Before creating reports just fill the 10-12 records in the Laptop Bookings object.**
- 2. Create records for each one you have to create at least 2 different records i.e dell(i3), dell(i7),acer(i3),hp(i5),mac(bionic chip).**

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Acer i3		✓	yamuna b, 01/01/2025, 4:01 pm
Acer i5		✓	yamuna b, 01/01/2025, 4:01 pm
Acer i7		✓	yamuna b, 01/01/2025, 4:02 pm
Dell i3		✓	yamuna b, 01/01/2025, 3:59 pm
Dell i5		✓	yamuna b, 01/01/2025, 4:00 pm
Dell i5			yamuna b, 01/01/2025, 4:04 pm
Hp i3		✓	yamuna b, 01/01/2025, 4:02 pm
Hp i5		✓	yamuna b, 01/01/2025, 4:02 pm
Hp i7			yamuna b, 01/01/2025, 4:03 pm



The screenshot shows the Salesforce App Launcher interface. At the top, there is a search bar with the text "Lap". Below the search bar, the "Apps" section is visible, showing a card for "LAPTOP RENTALS" and a link to "View All".

LAPTOP RENTALS

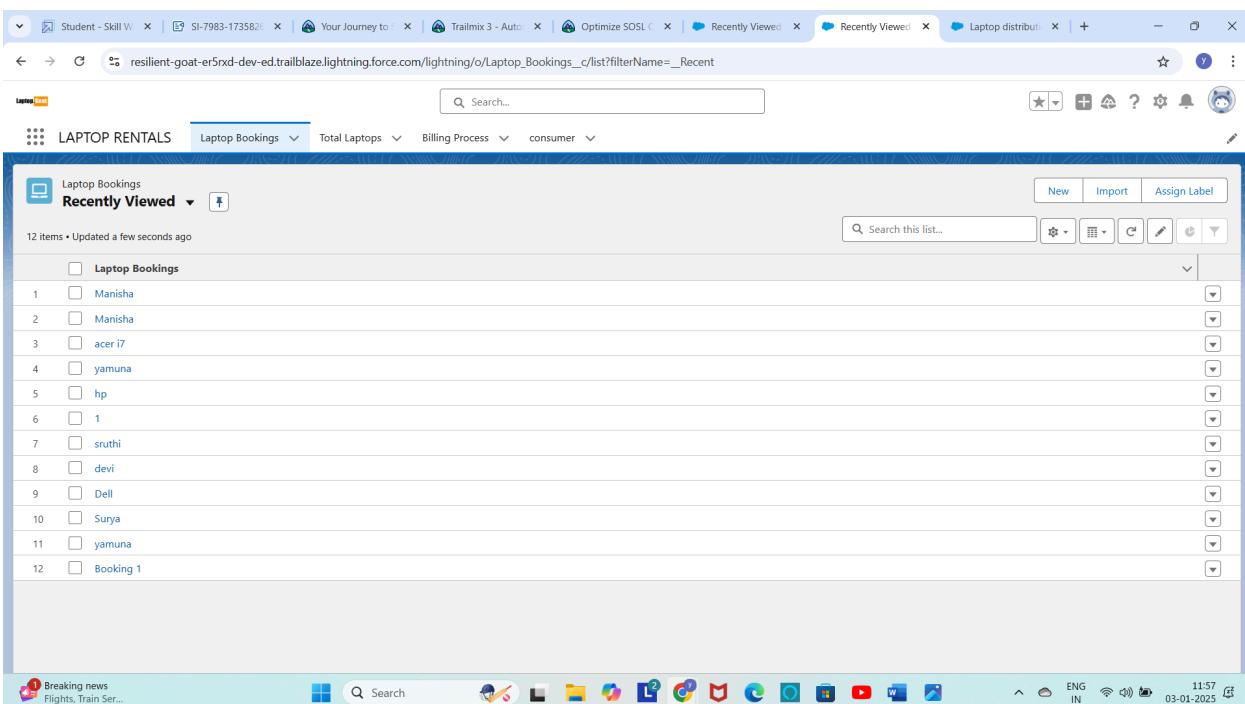
Items

Laptop Bookings

Total Laptops

View All

Buttons, Links, and Actions



The screenshot shows the "Laptop Bookings" list view in the Salesforce Lightning Experience. The page title is "Recently Viewed". The list contains 12 items, each with a checkbox and a dropdown arrow:

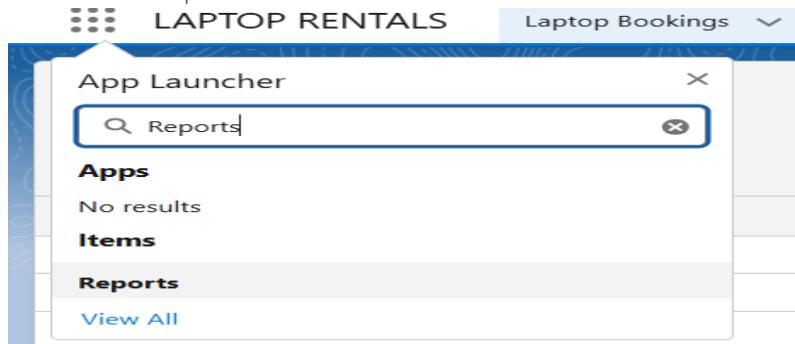
- 1. Laptop Bookings
- 2. Manisha
- 3. Manisha
- 4. acer i7
- 5. yamuna
- 6. hp
- 7. 1
- 8. sruthi
- 9. devi
- 10. Dell
- 11. Surya
- 12. yamuna
- 13. Booking 1

At the bottom of the screen, the Windows taskbar is visible, showing various open applications and system icons.

3.

Go to the app ? click on the reports tab

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.

A screenshot of the "Select a Report Type" panel. It features a search bar at the top with the text "cons". Below the search bar, it says "Showing results for cons". A table lists several report types, each with a dropdown arrow next to the category column. The table has two columns: "Report Type Name" and "Category".

Report Type Name	Category
Total Laptops with Laptop Bookings and consumer	Standard
consumer	Standard
<u>consumer with Laptop Bookings and Total Laptops</u>	Standard
consumer with Billing Process	Standard
consumer with Billing Process and Laptop Booking	Standard
consumer History	Standard

4. Create a simple tabular report

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

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

Edit Bucket Column

* Field	X	* Bucket Name
Amount	X	types of versions

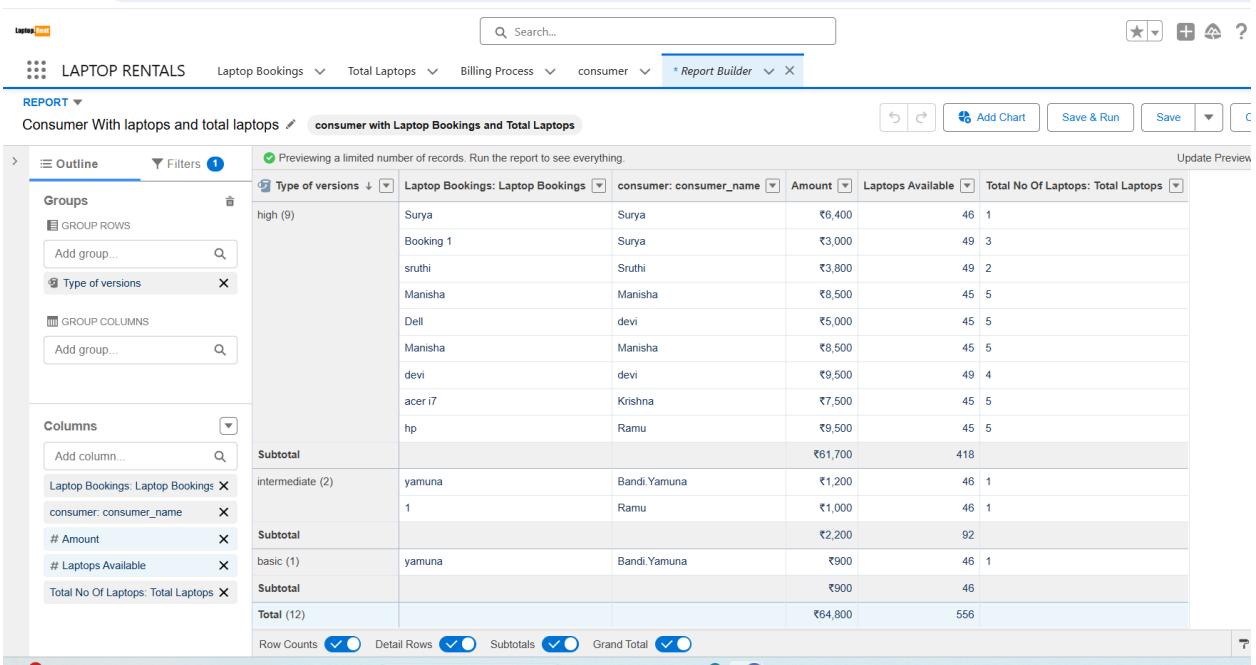
	Range	Bucket	
Add ►	≤ 900	basic	X
Add ►	> 900 to 1500	intermediate	X
Add ►	> 1,500 to 10000	high	X
Add ►	> 10,000	very high	X

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.



The screenshot shows the Report Builder interface with the following details:

- Report Title:** Consumer With laptops and total laptops
- Report Type:** consumer with Laptop Bookings and Total Laptops
- Groups:** Type of versions (high, intermediate, basic)
- Columns:** Laptop Bookings: Laptop Bookings, consumer: consumer_name, Amount, Laptops Available, Total No Of Laptops: Total Laptops
- Data Preview:**

Type of versions	Laptop Bookings: Laptop Bookings	consumer: consumer_name	Amount	Laptops Available	Total No Of Laptops: Total Laptops
high (9)	Surya, Booking 1, sruthi, Manisha, Dell, Manisha, devi, acer i7, hp	Surya, Surya, Sruthi, Manisha, devi, Manisha, devi, Krishna, Ramu	₹6,400, ₹3,000, ₹3,800, ₹8,500, ₹5,000, ₹8,500, ₹9,500, ₹7,500, ₹9,500	46, 49, 49, 45, 45, 45, 49, 45, 45	1, 3, 2, 5, 5, 5, 4, 5, 5
Subtotal			₹61,700	418	
intermediate (2)	yamuna, 1	Bandi Yamuna, Ramu	₹1,200, ₹1,000	46, 46	1, 1
Subtotal			₹2,200	92	
basic (1)	yamuna	Bandi Yamuna	₹900	46	1
Subtotal			₹900	46	
Total (12)			₹64,800	556	
- Report Options:** Row Counts, Detail Rows, Subtotals, Grand Total

Click on Save & run it.

Laptop Rentals

LAPTOP RENTALS Laptop Bookings Total Laptops Billing Process consumer * Consumer With laptops an... X

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

Type of versions Laptop Bookings: Laptop Bookings consumer: consumer_name Amount Laptops Available Total No Of Laptops: Total Laptops

Type of versions	Laptop Bookings: Laptop Bookings	consumer: consumer_name	Amount	Laptops Available	Total No Of Laptops: Total Laptops
high (9)	Surya	Surya	₹6,400	46	1
	Booking 1	Surya	₹3,000	49	3
	sruthi	Sruthi	₹3,800	49	2
	Manisha	Manisha	₹8,500	45	5
	Dell	devi	₹5,000	45	5
	Manisha	Manisha	₹8,500	45	5
	devi	devi	₹9,500	49	4
	acer i7	Krishna	₹7,500	45	5
	hp	Ramu	₹9,500	45	5
Subtotal			₹61,700	418	
intermediate (2)	yamuna	Bandi Yamuna	₹1,200	46	1
	1	Ramu	₹1,000	46	1
Subtotal			₹2,200	92	
basic (1)	yamuna	Bandi Yamuna	₹900	46	1
Subtotal			₹900	46	
Total (12)			₹64,800	556	

Row Counts Detail Rows Subtotals Grand Total

Sharing report to owner

- Click edit drop down and select subscribe option

Laptop Rentals

LAPTOP RENTALS Laptop Bookings Total Laptops Billing Process consumer * Consumer With laptops an... X

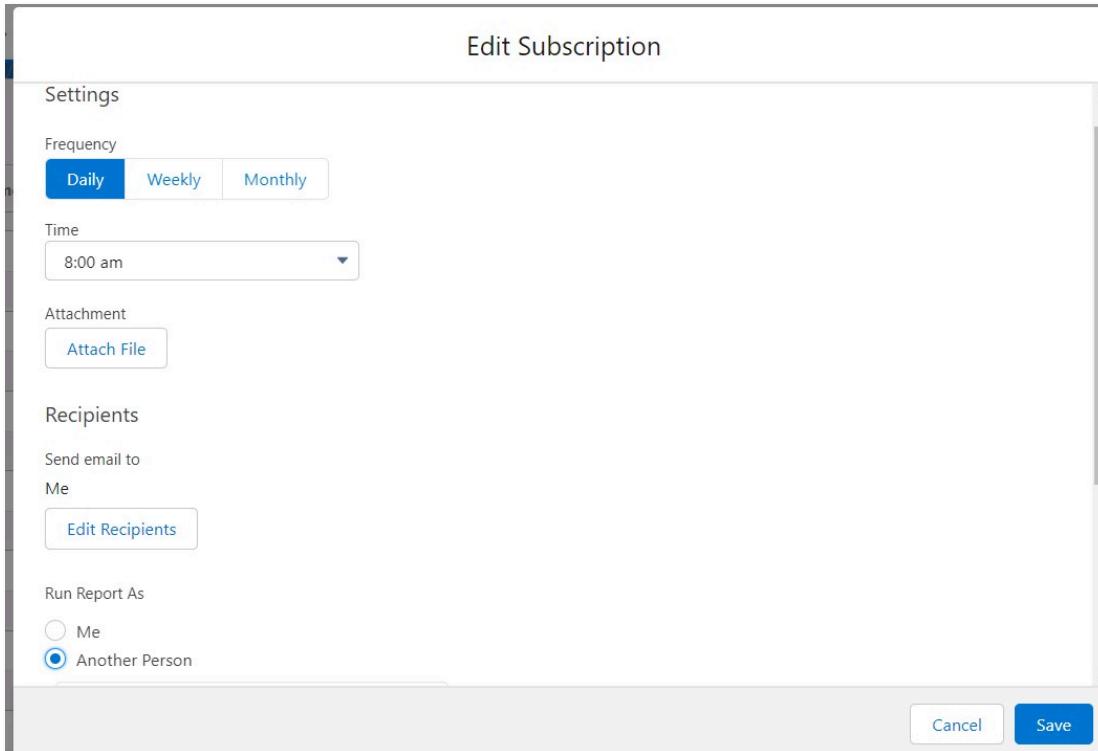
Report: consumer with Laptop Bookings and Total Laptops
Consumer With laptops and total laptops

Type of versions Laptop Bookings: Laptop Bookings consumer: consumer_name Amount Laptops Available Total No Of Laptops: Total Laptops

Type of versions	Laptop Bookings: Laptop Bookings	consumer: consumer_name	Amount	Laptops Available	Total No Of Laptops: Total Laptops
high (9)	Surya	Surya	₹6,400	46	1
	Booking 1	Surya	₹3,000	49	3
	sruthi	Sruthi	₹3,800	49	2
	Manisha	Manisha	₹8,500	45	5
	Dell	devi	₹5,000	45	5
	Manisha	Manisha	₹8,500	45	5
	devi	devi	₹9,500	49	4
	acer i7	Krishna	₹7,500	45	5
	hp	Ramu	₹9,500	45	5
Subtotal			₹61,700	418	
intermediate (2)	yamuna	Bandi Yamuna	₹1,200	46	1
	1	Ramu	₹1,000	46	1
Subtotal			₹2,200	92	
basic (1)	yamuna	Bandi Yamuna	₹900	46	1
Subtotal			₹900	46	

Save As
Save
Subscribe
Export
Delete
Add to Dashboard

- Follow as per below image.



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

NOTE: The owner gets daily email notification of that laptop booking report.so that he can see all data remotely.

Welcome to our company

yamuna b via zirln2gkhuhh7b1.vah3.dl-5ylkhu0.ind134.bnc.salesforce.com
to me

Thu, Jan

Dear Customer,
Welcome to Laptop Rentals! You have been seen as a valuable customer to us.
Please continue your journey with us, while we try to provide you with good quality resources.
Laptop Amount = null
core type = Core i7
Laptop type = Hp

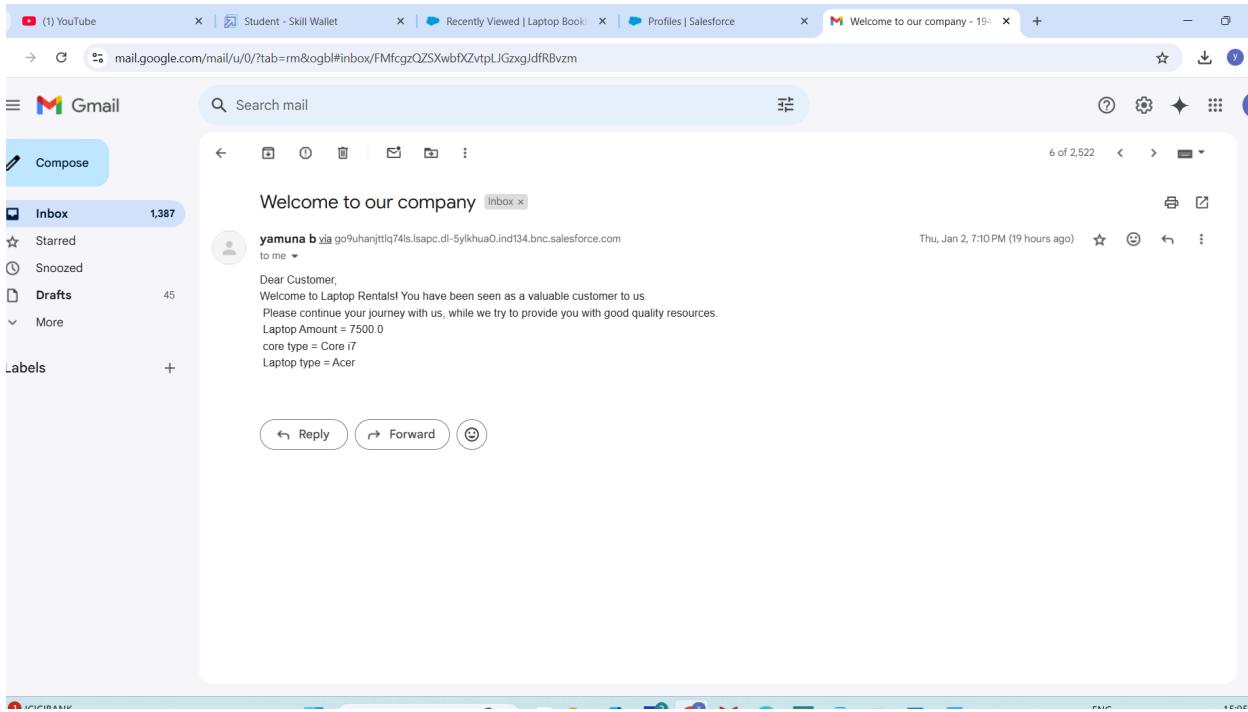
Compose

Inbox 1,386

- Starred
- Snoozed
- Drafts 45
- More

Labels +

Reply **Forward** **Smile**

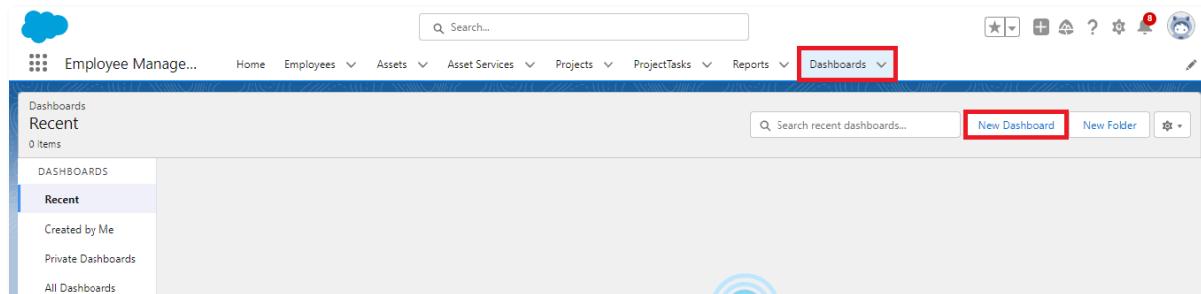


Create Dashboard Folder

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

Create Dashboard

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



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

New Dashboard

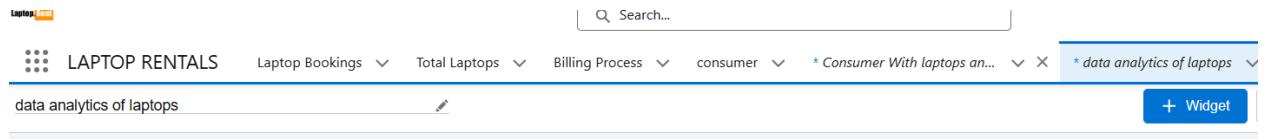
* Name

Description

Folder
 Select Folder

Cancel Create

3. Select add widget.

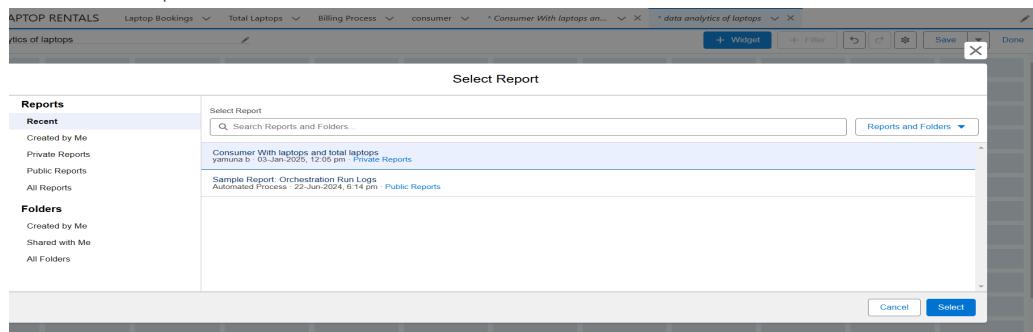


Laptop Rentals Search...

LAPTOP RENTALS Laptop Bookings Total Laptops Billing Process consumer * Consumer With laptops an... X * data analytics of laptops X

data analytics of laptops Edit + Widget

4. Select a Report and click on select.



APTOP RENTALS Laptop Bookings Total Laptops Billing Process consumer * Consumer With laptops an... X * data analytics of laptops X

data analytics of laptops Edit + Widget

Select Report

Reports

Recent

- Created by Me
- Private Reports
- Public Reports
- All Reports

Folders

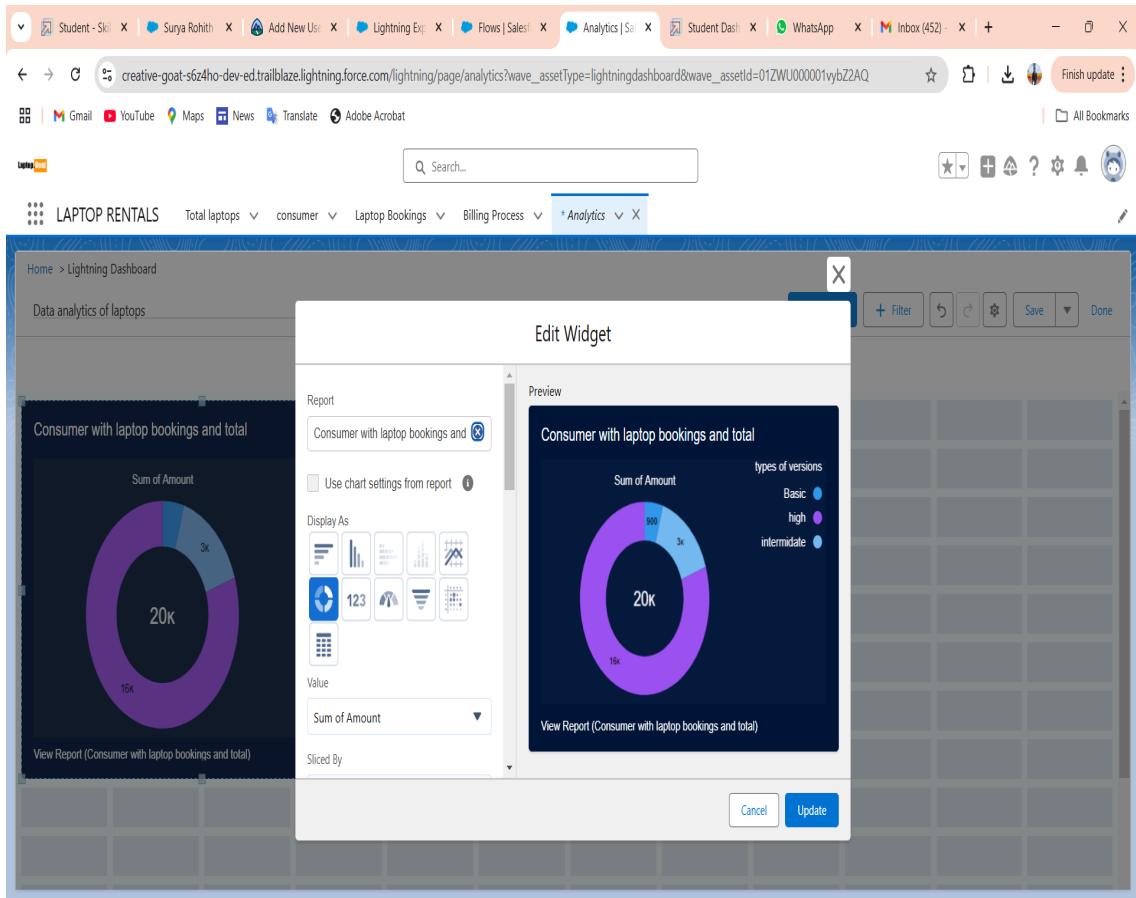
- Created by Me
- Shared with Me
- All Folders

Select Report Search Reports and Folders... Reports and Folders ▾

Consumer With laptops and total laptops yamuna b - 03-Jan-2025, 12:05 pm Private Reports

Sample Report Orchestrated Run Logs Automated Process - 22-Jun-2024, 6:14 pm Public Reports

Cancel Select



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

5. Testing and Validation

- **Unit Testing:** Apex test classes validate trigger logic and email notifications.
- **User Interface Testing:** Ensures accurate data display and seamless functionality for bookings and inventory tracking.

6. Key Scenarios Addressed

- Real-time updates on laptop availability post-booking.
- Automated email notifications for booking confirmations.
- Dynamic validation to prevent overbooking.
- Comprehensive reporting on rentals and inventory status.

Conclusion

Summary of Achievements:

The project successfully automated laptop rental management, improved inventory tracking accuracy, and enhanced user experience with real-time notifications and dashboards. This scalable solution supports future enhancements, including integration with external systems for expanded functionality.

THE END

