A CRM APPLICATION FOR LAPTOP RENTALS

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

Below is a breakdown down how the CRM system functions in the context of laptop rentals, and how it can improve both the rental process and customer relationship management (CRM).

1. Customer Relationship Management (CRM) Basics

CRM stands for Customer Relationship Management, and its goal is to understand and anticipate customer needs. It uses data analytics about customers' history with the company to improve business relationships, assist in customer retention, and drive sales growth. In the context of a laptop rental business, CRM can be leveraged in several key areas:

Customer Interaction Tracking: Track and manage every interaction a customer has with the company. This includes inquiries, complaints, orders, payments, and feedback.

Personalized Communication: Based on customer history, send tailored offers, reminders, promotions, and updates. This can be done through email, SMS, or app notifications.

Sales and Marketing: Identify high-value customers, leads, and untapped markets, allowing for targeted marketing campaigns.

Customer Segmentation: Group customers based on various characteristics, such as rental frequency, type of laptop rented, or geographical location, to deliver more relevant and personalized offers.

2. Key Features of a Laptop Rental CRM Application

a. Customer Profiles

Data Collection: Store and manage detailed profiles of customers, including personal details (name, contact information), rental history, payment methods, preferences, and feedback.

Customer Segmentation: Organize customers into groups (e.g., business customers, students, occasional renters) to provide tailored services and communication.

Behaviour Tracking: Track when customers last rented, what models they rented, their frequency of rentals, etc. This data can be used to personalize offers and ensure timely communication.

b. Rental Management

Inventory Management: Track available laptops in real-time, noting which ones are available for rent, in use, or under maintenance.

Rental Duration & Scheduling: Customers can select rental periods (daily, weekly, or monthly), and the system ensures proper billing based on the duration.

Availability Alerts: Customers receive automatic notifications if a laptop they're interested in is available again after being rented out.

c. Order and Payment Management

Order Creation: Customers can book laptops through the application by selecting models, rental period, and other preferences (e.g., accessories).

Invoicing & Payments: Automatically generate invoices based on rental duration, model, and any additional services. The system should support multiple payment methods, including credit/debit cards, bank transfers, and digital wallets.

Late Fees: Implement automatic late fee calculations if customers return laptops past the rental period.

d. Communication & Engagement

Email Automation: Send personalized emails at various stages of the rental process: order confirmation, rental reminders, maintenance updates, return reminders, etc.

Customer Support: Integrated help desk for handling queries or issues related to rentals, laptop issues, or payments.

Feedback Collection: After a rental period, ask customers for feedback to improve services. Automated surveys or ratings can be sent via email or the app.

e. Reporting and Analytics

Sales Analytics: Track rental volumes, popular models, customer demographics, and rental trends. This helps in inventory management and decision-making for future acquisitions.

Customer Lifetime Value (CLV): Calculate the long-term value of each customer based on repeat rentals and their engagement with special offers or marketing campaigns.

Revenue and Expense Tracking: Maintain detailed financial records, such as income from rentals, payment processing fees, and laptop maintenance costs.

3. CRM for Effective Communication with Customers

A significant part of CRM in a laptop rental application is the ability to effectively communicate with customers, especially potential ones who may not have rented yet. Here's how the system can enhance communication and engagement:

a. Automated Email Campaigns

New Customer Onboarding: When a new customer registers or shows interest in renting a laptop, send a welcome email explaining the rental process, policies, and special offers for first-time renters.

Personalized Rental Reminders: Send emails or notifications when it's time to return rented laptops or renew the rental period, helping customers avoid late fees.

Promotional Offers: Target customers based on their rental history with personalized email promotions or discounts (e.g., "20% off your next rental if you rent for 7 days or more").

Re-engagement Campaigns: For customers who haven't rented in a while, send re-engagement emails offering them a special discount or reminding them of your services.

b. Customer Support via Email

Issue Resolution: Use the CRM system to automatically generate support tickets when customers email regarding issues with their rentals, such as laptop malfunctions or damage. This ensures the issue is tracked and resolved promptly.

Post-Rental Communication: After a rental period ends, you can ask for feedback via email to gauge customer satisfaction and improve your services.

c. Segmentation for Targeted Marketing

By analysing customer behaviour data, CRM tools allow you to segment customers into various categories (e.g., frequent renters, long-term renters, seasonal renters). Based on this segmentation, you can craft highly-targeted marketing campaigns:

Frequent Renters: Send loyalty discounts, offers for long-term rentals, or personalized emails about new laptop models in stock.

First-Time Renters: Offer a discount or incentive for their second rental to build repeat business.

Seasonal Renters: For instance, students renting during exam time, or business professionals during travel periods. Send emails with promotions tailored to their rental needs.

4. Enhancing Customer Experience

To foster better relationships and increase customer loyalty, the application should focus on customer experience. Here are ways CRM can enhance it:

Easy Booking Process: Make it simple and quick for customers to reserve laptops, view available models, and choose their rental period.

Real-Time Updates: Send real-time notifications or emails regarding the status of the rental (e.g., dispatch confirmation, expected delivery time).

Loyalty Programs: Integrate loyalty programs, rewarding customers with discounts, free accessories, or extended rental periods based on their repeat business.

Proactive Maintenance: Keep customers informed about any maintenance needs on rented laptops. If a laptop is unavailable for any reason, offer an alternative or compensation.

5. Technical Integration

A well-integrated CRM system will connect with other business systems such as:

Inventory Management Software: Sync rental data with inventory, so you always know which laptops are in use and which are available for rent.

Payment Gateways: Seamlessly integrate with payment platforms like PayPal, Stripe, or bank accounts to handle payments efficiently.

Customer Support Systems: Integrate with help desk tools like Zendesk or Freshdesk to ensure that customer issues are logged, tracked, and resolved.

Steps to Create a Salesforce Developer Account:

To create a Salesforce Developer Account by signing up for a Salesforce Developer Organization (org), follow the steps outlined below:

Go to the Signup Page: On the sign-up page, you'll need to fill in the following details:

First Name: Enter your first name.

Last Name: Enter your last name.

Email: Enter your email address (this email will be used for notifications related to your Salesforce Developer org).

Role: Select Developer from the drop-down list.

Company: Enter your college name (as you are using it for academic or learning purposes).

Country: Choose India from the drop-down list.

Postal Code: Enter the postal code (PIN code) of your location in India.

Username: This should be a unique Salesforce username. It does not need to be a real email address, but it must be in the following format: username@organization.com

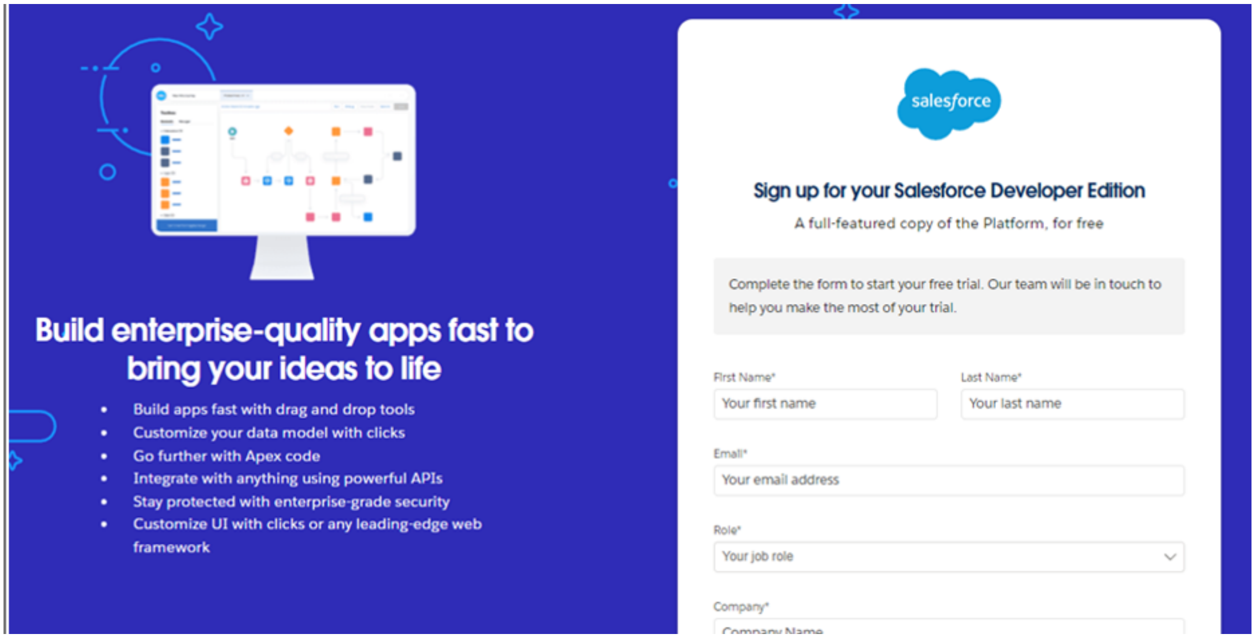
For example: johnsmith@mycollege.com. The username must be unique across Salesforce, so ensure you use a combination of your name and college name or any unique identifier.

Agree to the Terms: After filling out all the details, read and agree to Salesforce's terms of service.

Complete the Sign-Up: Once the form is complete, click on Sign Me Up.

Check Your Email: After submitting the form, Salesforce will send you a verification email to the address you provided. Follow the instructions in the email to verify your account.

Access Your Developer Organization: After verifying your email, you can log in to your newly created Salesforce Developer Organization using the username and password you set during registration.



Object Creation

Create Total Laptops Object

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

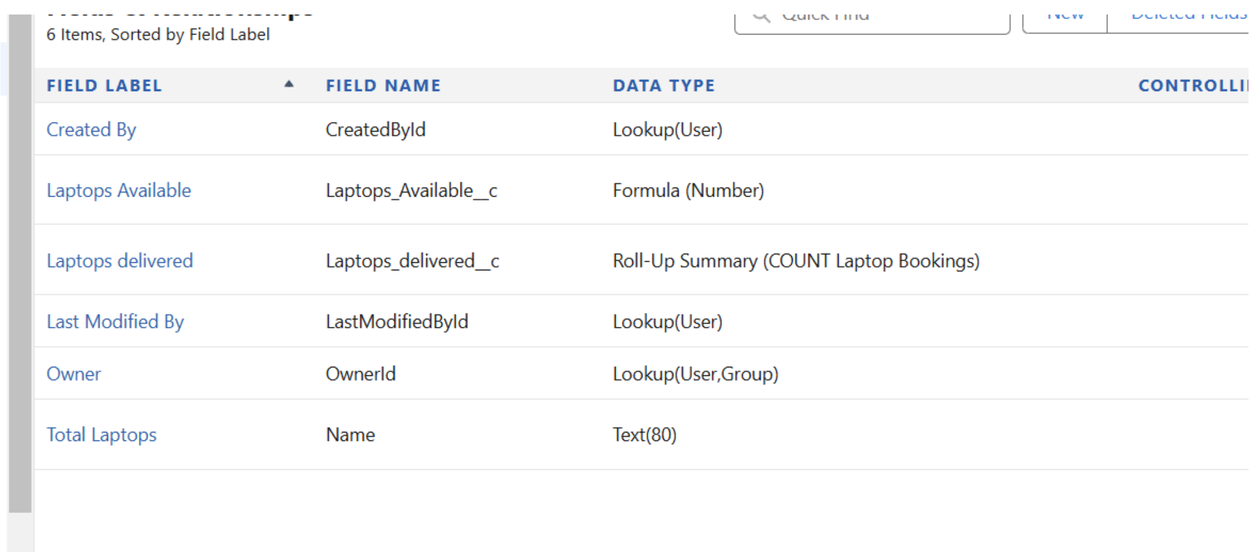
1) Enter the label name>> Total Laptops
2) Plural label name>> Total Laptops
3) Enter Record Name, Label, and Format

Record Name >>Total Laptops

Data Type >> Text

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

Allow search >> Save.



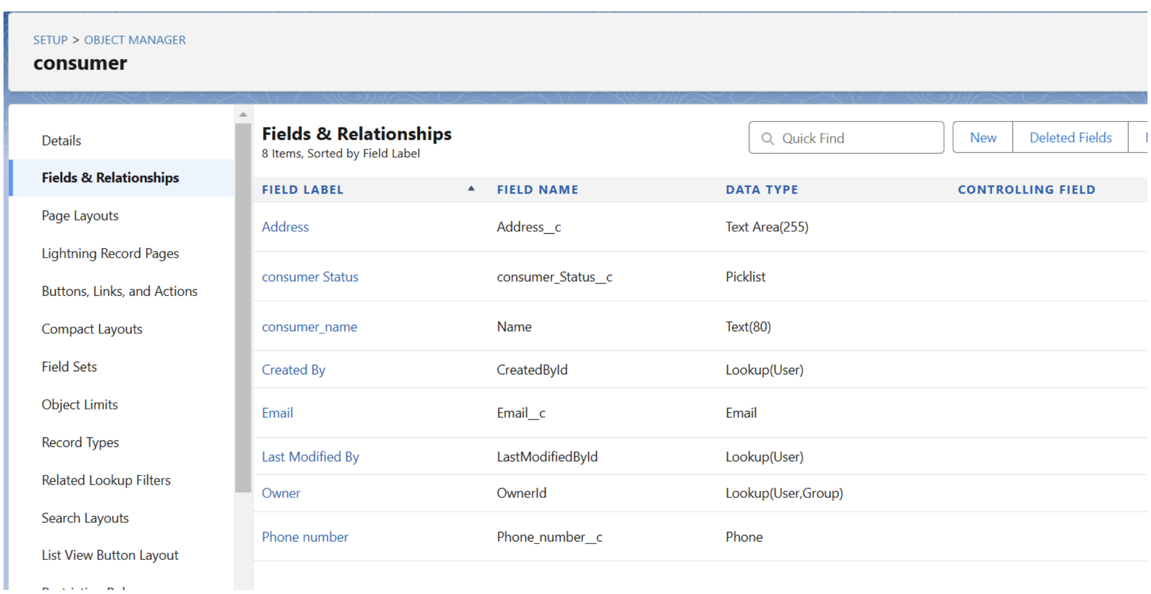
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLI
Created By	CreatedById	Lookup(User)	
Laptops Available	Laptops_Available__c	Formula (Number)	
Laptops delivered	Laptops_delivered__c	Roll-Up Summary (COUNT Laptop Bookings)	
Last Modified By	LastModifiedById	Lookup(User)	
Owner	OwnerId	Lookup(User,Group)	
Total Laptops	Name	Text(80)	

Create consumer Object

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

1) Enter the label name >> consumer
2) Plural label name >> consumer
3) Enter Record Name, Label, and Format
   Record Name >> consumer_name
   Data Type >> Name

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

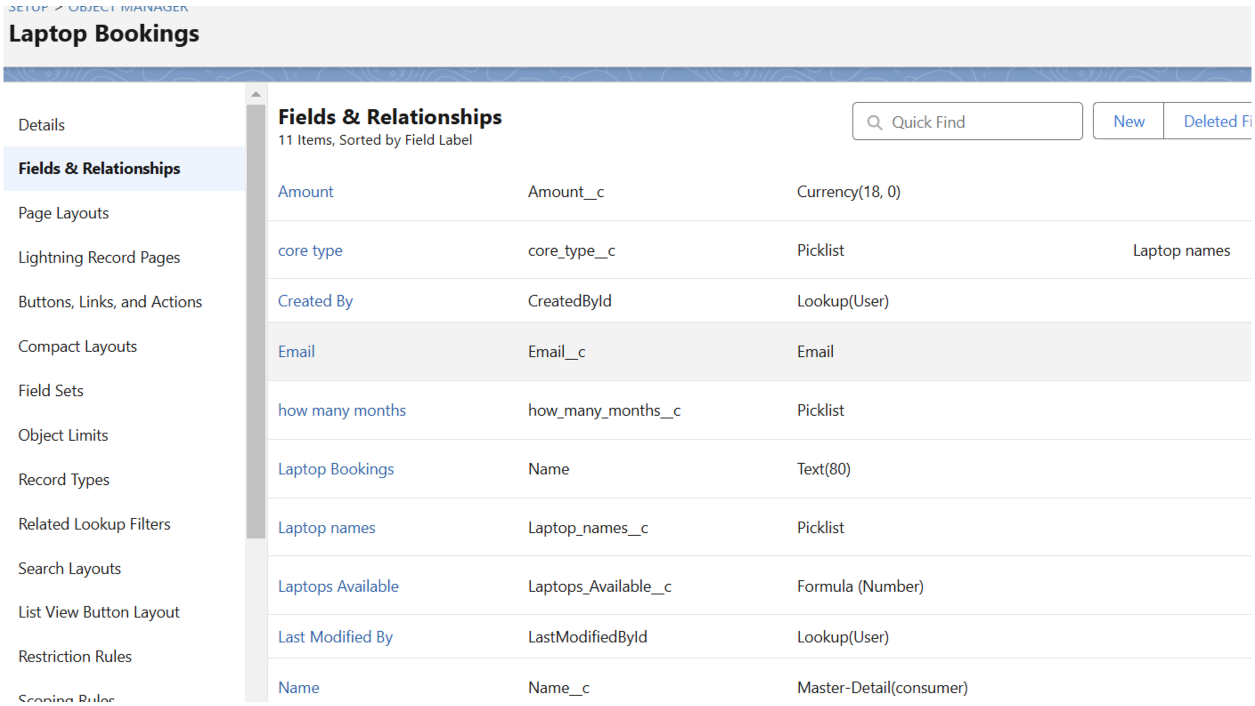


FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD
Address	Address__c	Text Area(255)	
consumer Status	consumer_Status__c	Picklist	
consumer_name	Name	Text(80)	
Created By	CreatedById	Lookup(User)	
Email	Email__c	Email	
Last Modified By	LastModifiedById	Lookup(User)	
Owner	OwnerId	Lookup(User,Group)	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

Create Laptop Bookings Object

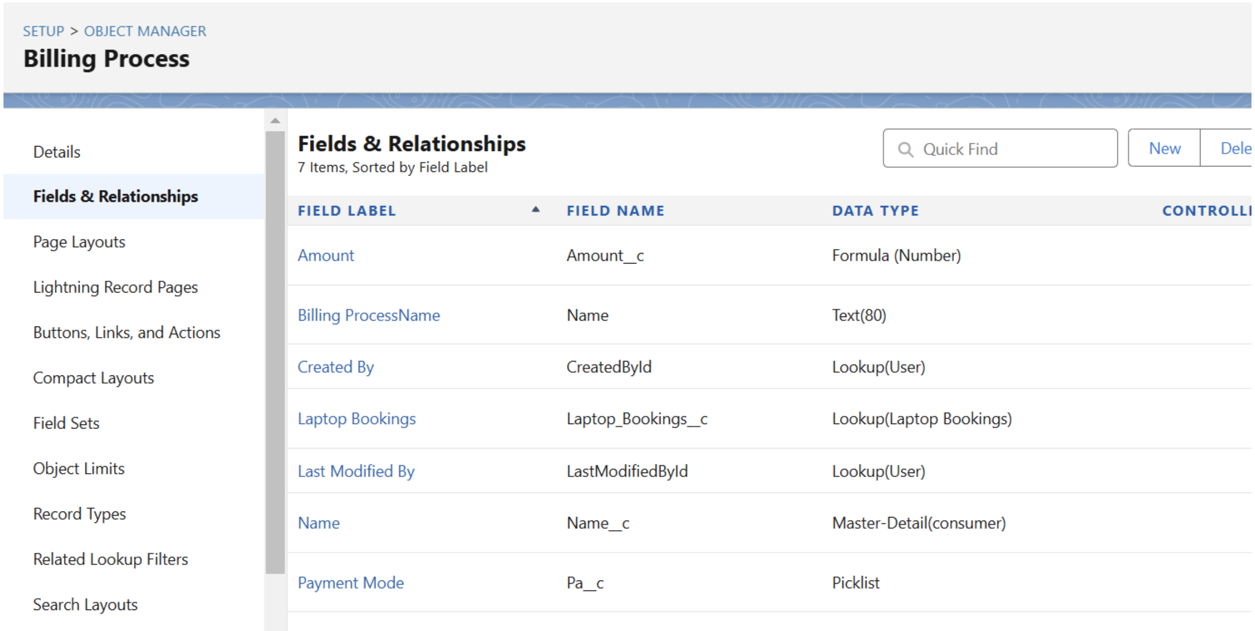
From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom

Object.
1) Enter the label name >> Laptop Bookings
2) Plural label name >> Laptop Bookings
3) Enter Record Name, Label, and Format
Record Name >> Laptop Bookings
Data Type >> Name
Click on Allow reports,Allow search, and Track Field History,
Allow search >> Save.



Create Billing Process Object

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



Steps to Create a Lightning App in Salesforce:

1. Go to Setup:

Log in to your Salesforce org.

Click the Gear Icon (⚙) in the top-right corner of the screen and select Setup from the dropdown.

2. Access the App Manager:

In the Quick Find box (on the left side), type "App Manager" and press Enter.

Under the App Setup section, select App Manager from the search results.

3. Create a New Lightning App:

In the App Manager, click the New Lightning App button in the top-right corner.

4. Enter App Details:

App Name: In the App Details section, enter the name of your app as LAPTOP RENTALS.

Developer Name: This is auto-filled based on your app name. You can leave it as default.

Click Next.

5. App Options Page:

In the App Options section, leave everything as default. You can keep the default settings for "App Page" and click Next.

6. Utility Items:

In the Utility Items section, leave everything as default as well. This step can be skipped or you can add utility items later.

Click Next.

7. Upload a Photo for Your App:

In the App Branding section, you will be prompted to upload a photo related to your app.

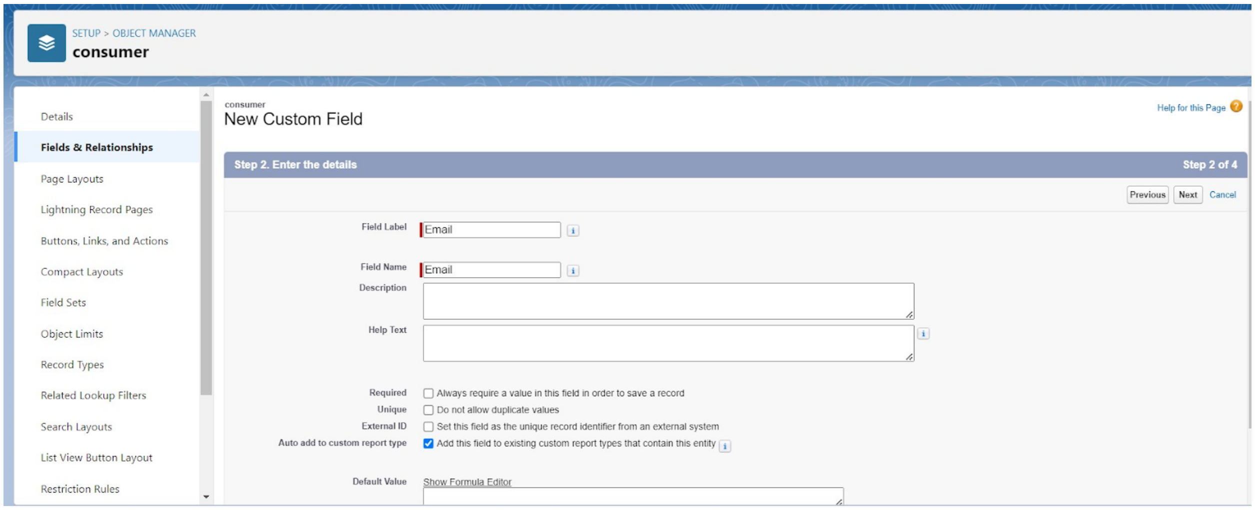
Recommended Image Size: 128 x 128 pixels.
Choose a logo or image that reflects your app's purpose (for example, an image of a laptop).
After uploading the photo, click Next.
8. Add Navigation Items:
In this step, you will add the navigation items that will appear in your app.
Search for Navigation Items:
In the Search Bar, type and search for the following items:
Total Laptops
Consumer
Laptop Booking
Billing Process
For each item, select it from the list and click the right arrow to add it to your app's navigation.
Once all items are added, click Next.
9. Add User Profiles:
In the Assign Profiles section, search for System Administrator in the search bar. This profile will have full access to the app.
Select System Administrator and click the right arrow to add it to the list of profiles with access to the app.
Once the profile is added, click Save & Finish.
10. App Creation Complete:
Your LAPTOP RENTALS Lightning App has now been created! You can click on View to preview the app or start customising the pages, objects, and components further.
You can access the app from the App Launcher (the 9-dot grid in the top left corner of Salesforce) and search for LAPTOP RENTALS.

Creating the field in consumer object

1. To create fields in an object:
2. Go to setup >> click on Object Manager >> type object name(consumer) in search bar >> click on the object.
3. Now click on "Fields & Relationships" >> New
4. Select Data Type as a "Phone"
5. Click on next
6. Fill the Above as following:
7. Field Label: Phone number
8. Field Name : gets auto generated
9. Click the required option checkbox.
10. Click on Next >> Next >> Save and new.
11. To create another field in an object:

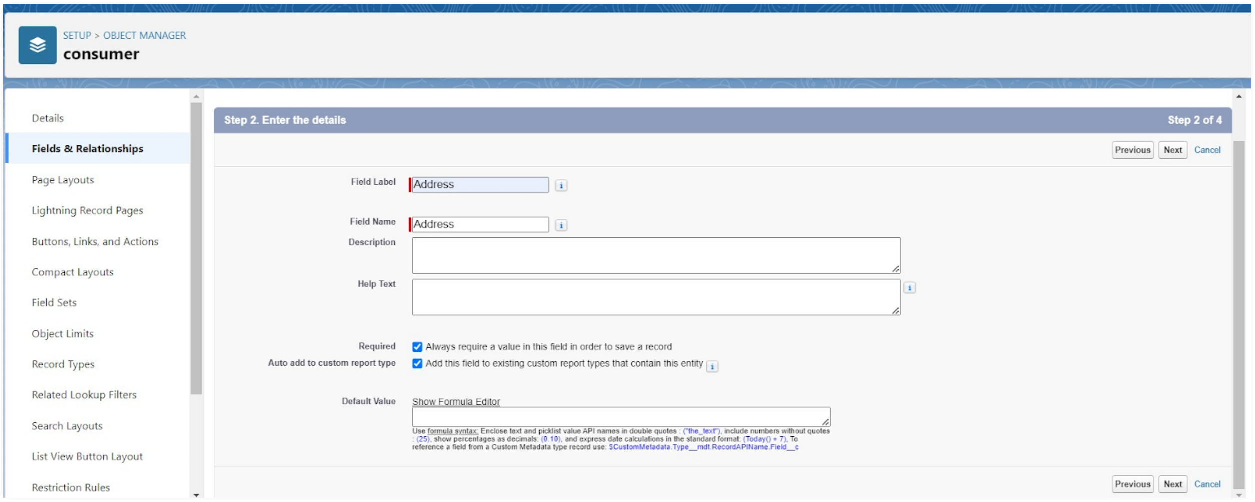
12. Go to setup >> click on Object Manager >> type object name(consumer) in search bar >> click on the object.
13. Now click on “Fields & Relationships” >> New
14. Select Data type as “Email” and Click on Next
15. Fill the Above as following:
16. Field Label: Email
17. Field Name :It’s gets auto generated

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



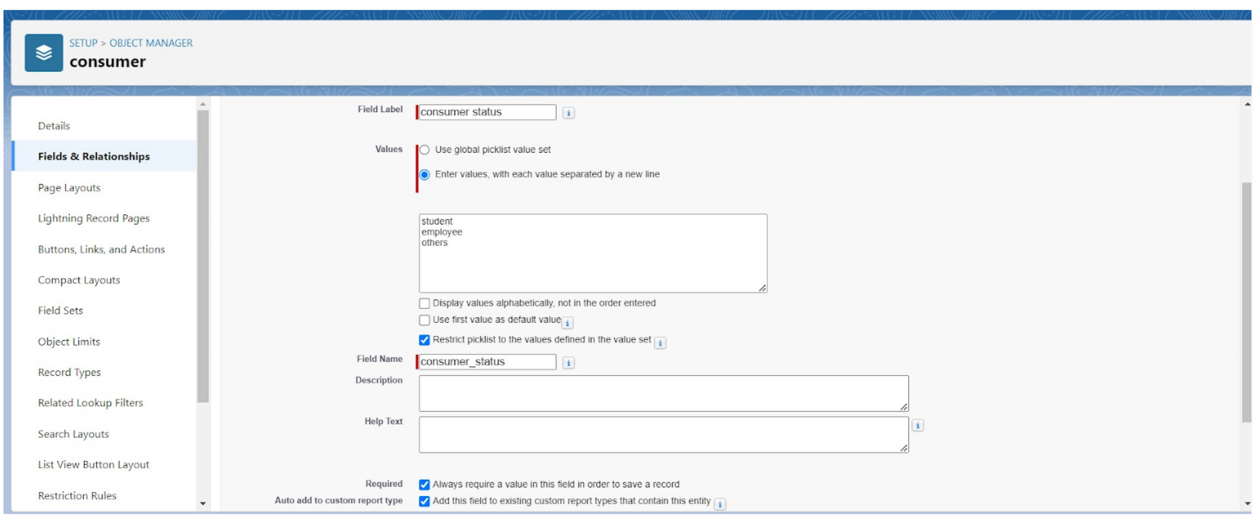
To create another field in an object:

1. Go to setup >> click on Object Manager >> type object name(consumer) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as a “Text Area” and Click on Next
4. Fill the Above as following:
5. Field Label: Address
6. Field Name : It’s gets auto generated
7. Select Required field.
8. Click on Next >> Next >> Save and new.



To create another field in an object:

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



Creating the field in Laptops Bookings object

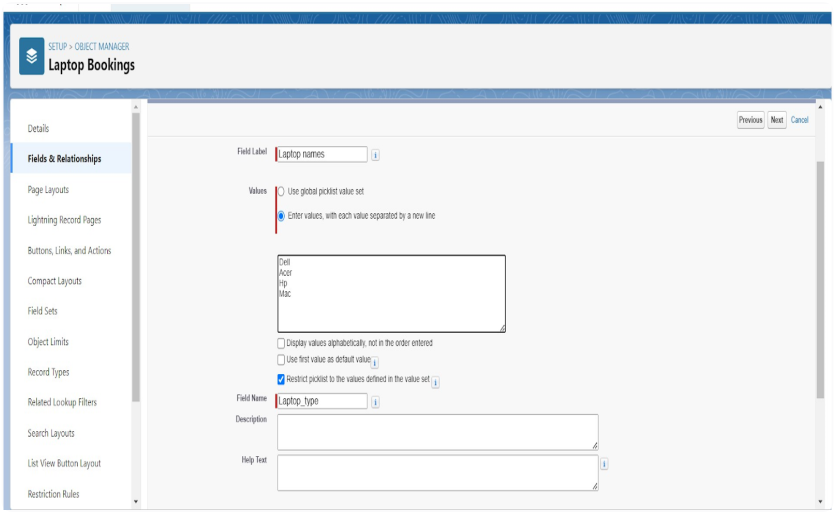
To create fields in an object:

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

Now click on “Fields & Relationships” >> New

Select Data Type as a “Picklist”

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



Select required

Click on Next >> Next >> Save and new

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

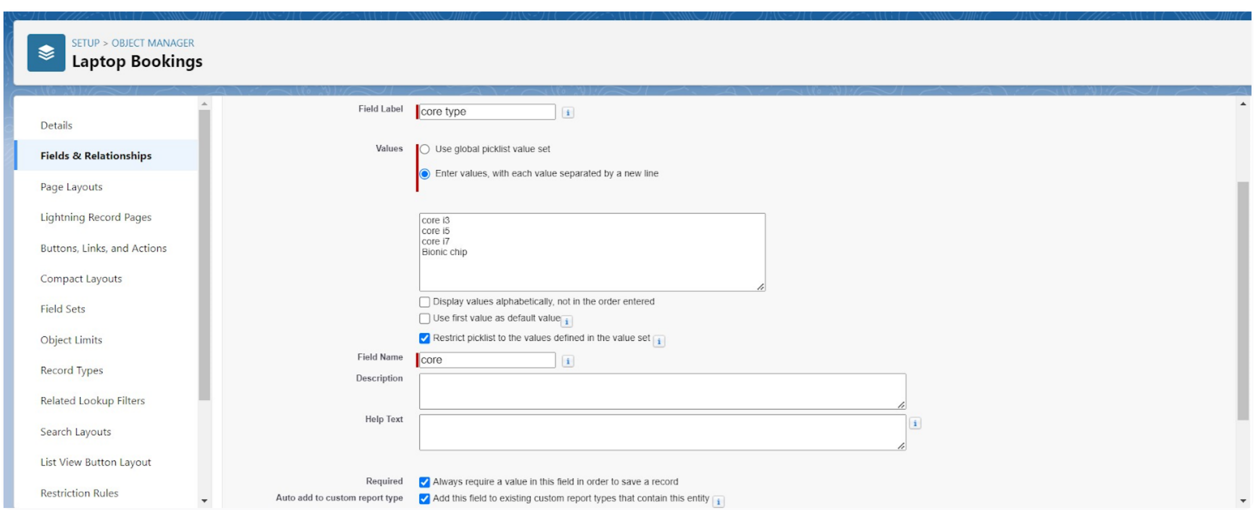
To create fields & relationships to an object:

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 "Picklist"

Picklist



Select required

Click on Next >> Next >> Save and new

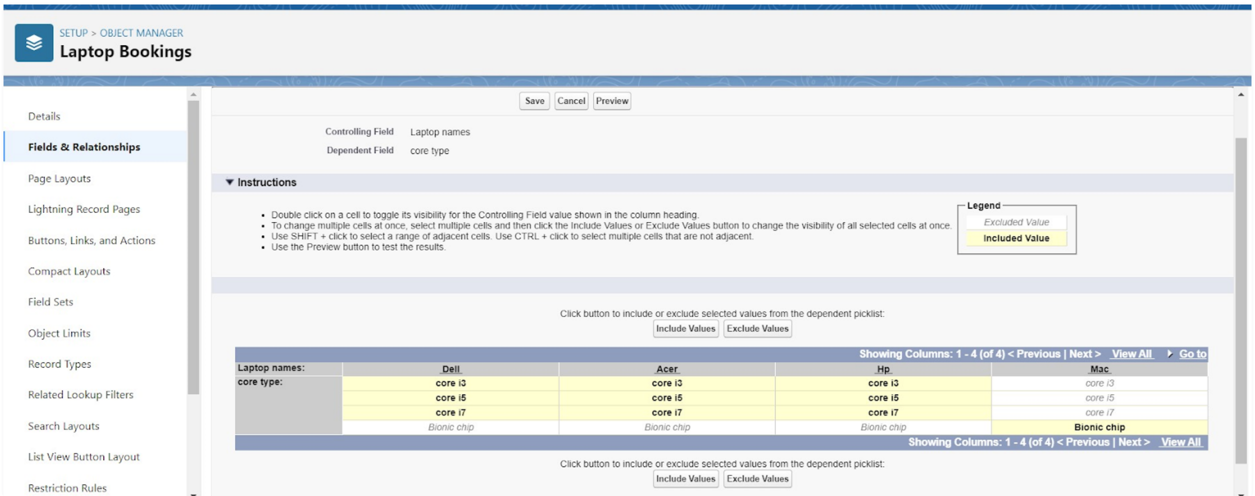
To Create a Fields & Relationship to an Laptop Booking Object

To create fields & relationships to an object:

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

2.click field dependency and next

3. Click the include value for dell-core i3,i5,i7 and for acer i3,i4,i5 and for hip i3,i4,i5 and also for mac bionic chip include the values for it.



Click save.

To Create a Fields & Relationship to an Laptop Booking Object

To create fields & relationships 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

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.

To create fields in an object:

1.Go to setup >> click on Object Manager >> type object name(Laptop Booking) in the 2.search bar >> click on the object.

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

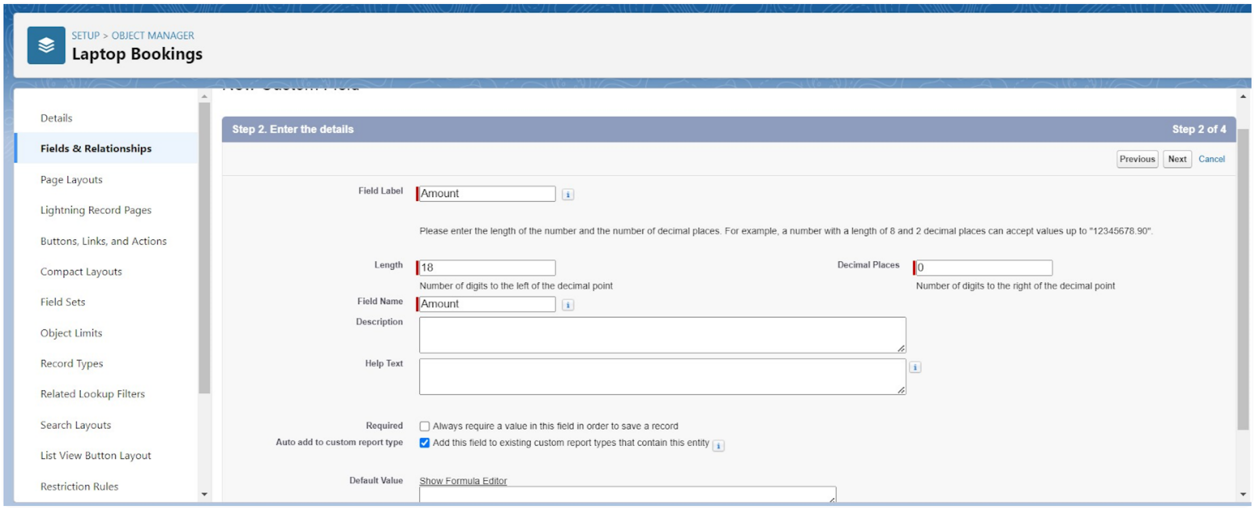
4.Select Data Type as a “Currency”

5.Click on Next

Fill the Above as following:

Field Label: Amount

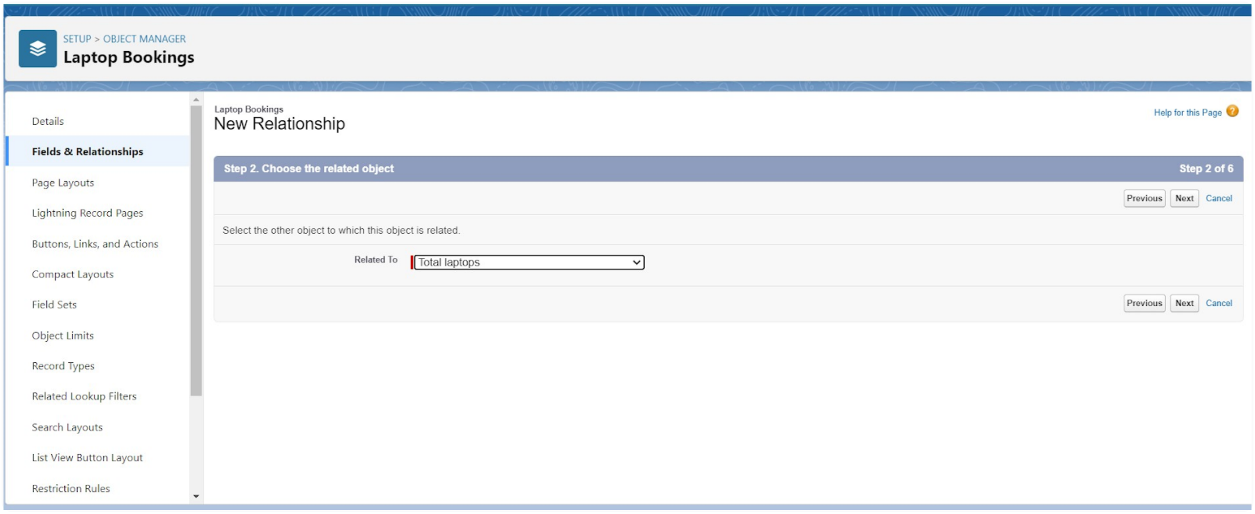
Length: (18,0)
Field Name :It's gets auto generated
Click on Next >> Next >> Save and new



To Create a Fields & Relationship to an Object

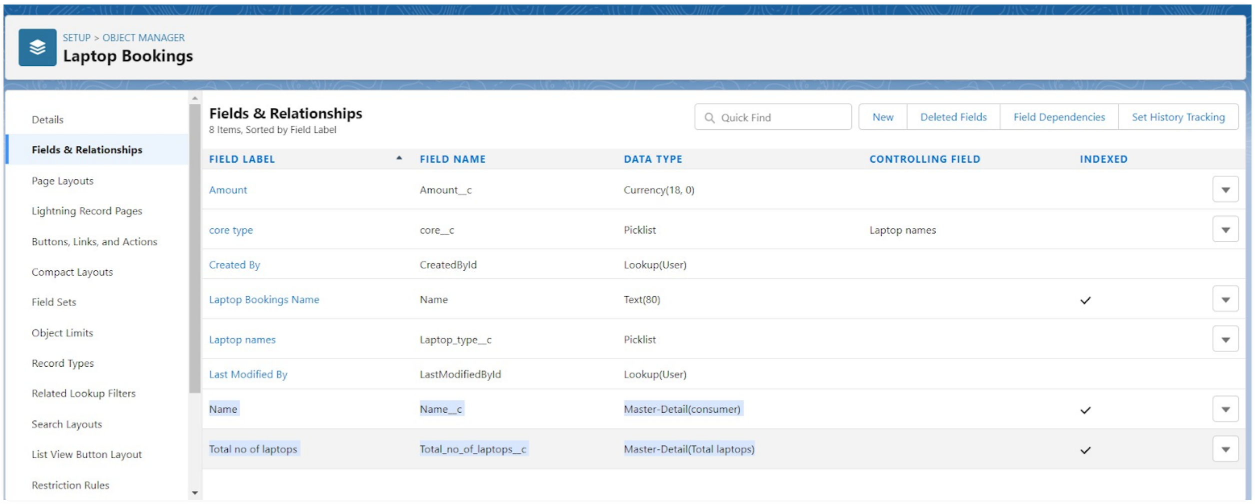
1.Go to setup >> click on Object Manager >> type object name(Laptop Booking) in the search bar >> click on the object.

2.Now click on "Fields & Relationships" >> New Select Data Type as a "Lookup Relationship" Click on Next

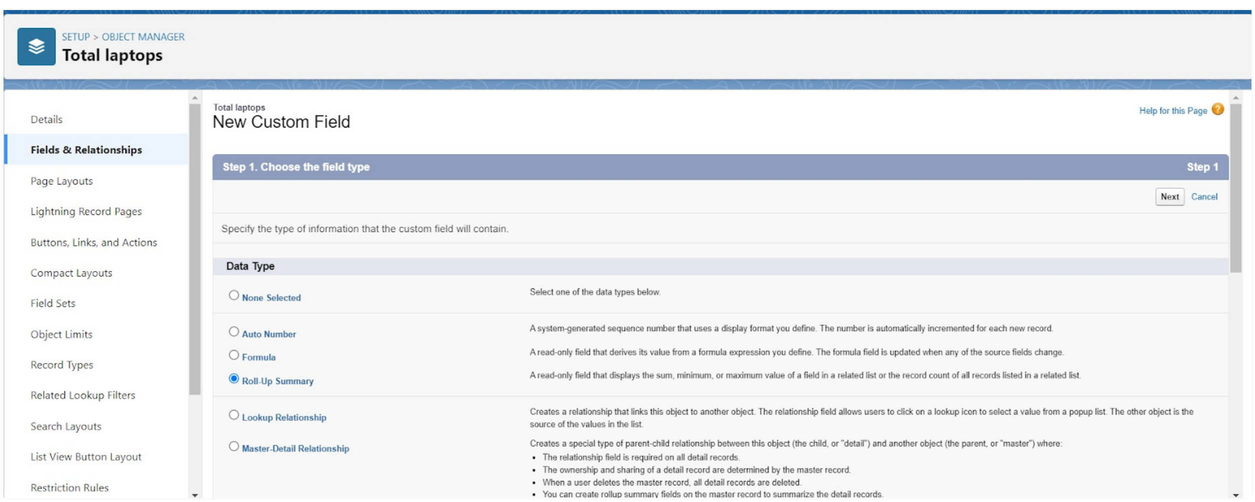


3.Click on the Related to drop down and Select the "Total Laptops" object and click on Next
Fill the Above as following:
Change the Field Label: Total No Of Laptops
Field Name :It's gets auto generated
Click on Next >> Next >> Save and new.
4. To Create a Fields & Relationship to an Laptop Booking Object
To create fields & relationships to an object:

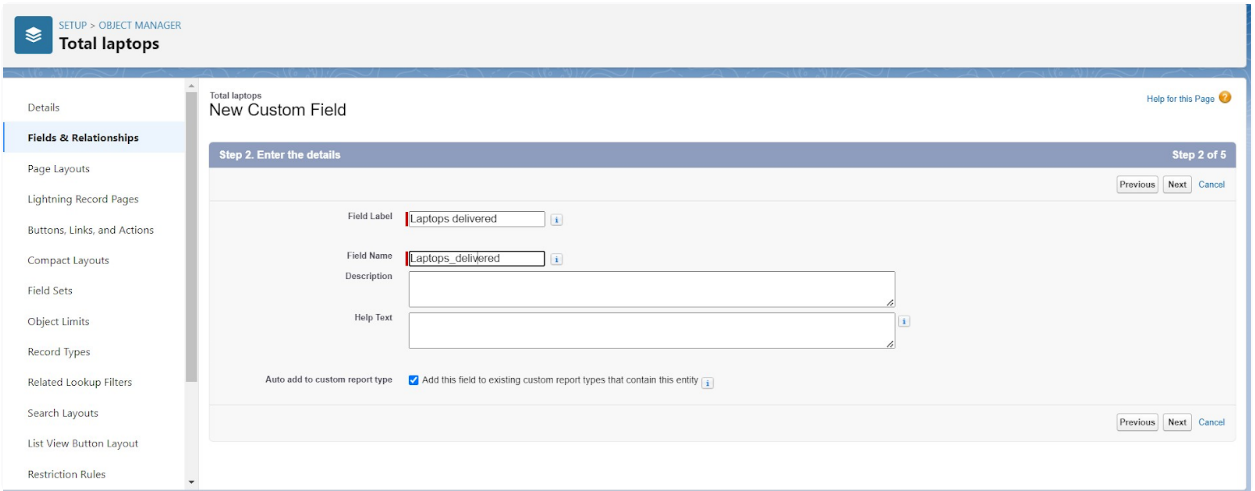
Go to setup >> click on Object Manager >> type object name(Laptop Booking) in the search bar >> click on the object.
Now click on “Fields & Relationships” >> New
Select Data Type as an “Email”
Click on Next and save it.



To Create a Rollup Summary Field in “Total Laptops Object”
After Creating the Lookup 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



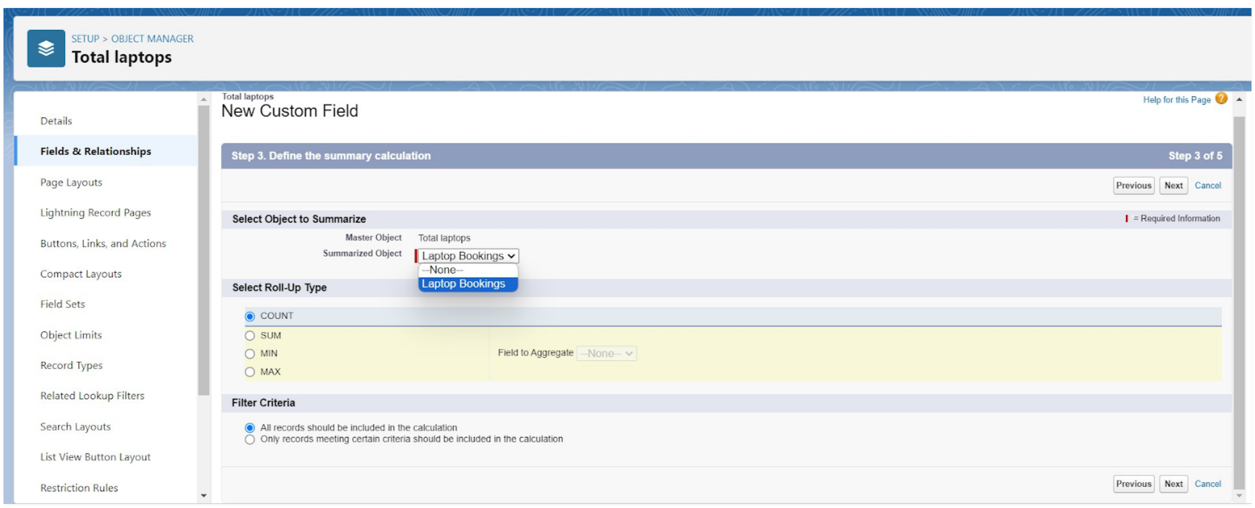
Select Data type as a “Roll-up Summary” and Click on Next
Fill the Above as following:
Field Label: Laptops delivered
Field Name :It’s gets auto generated



Click on Next

Select the Laptop Bookings in the Summarized Object

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



8. 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

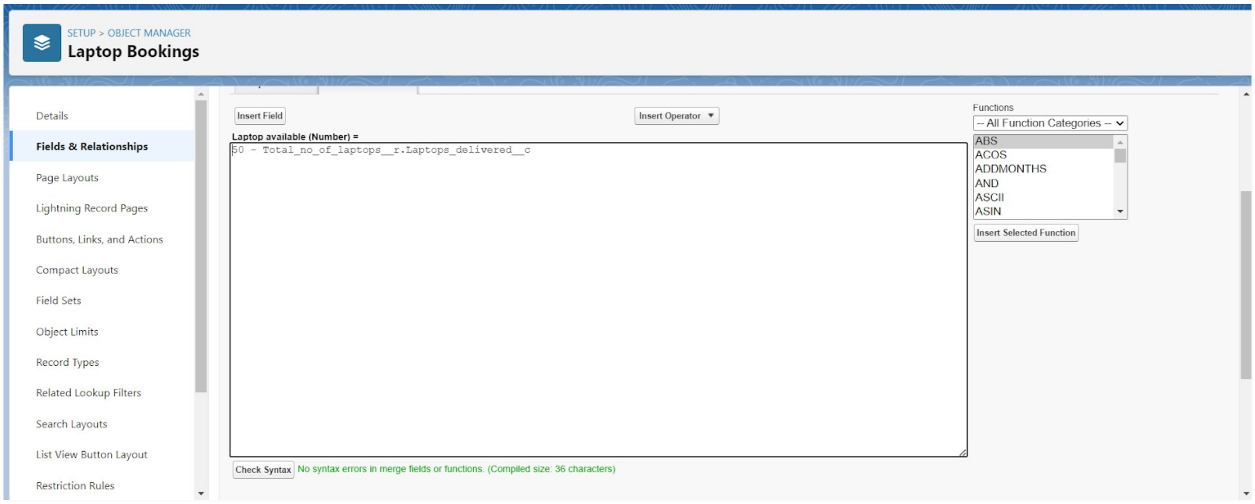
Field Name : It’s gets auto generated

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 the formula box “ 50 - ” and Click on the insert field; then you will find a pop window under the Laptop Booking select the Total No Of Laptops in the second Column and select the Laptops delivered in the third column and click on insert

“ 50 - Total_no_of_laptops__r.Laptops_delivered__c ” and Check Syntax



Click on Next >> Next >> Save and new

To create fields in an object:

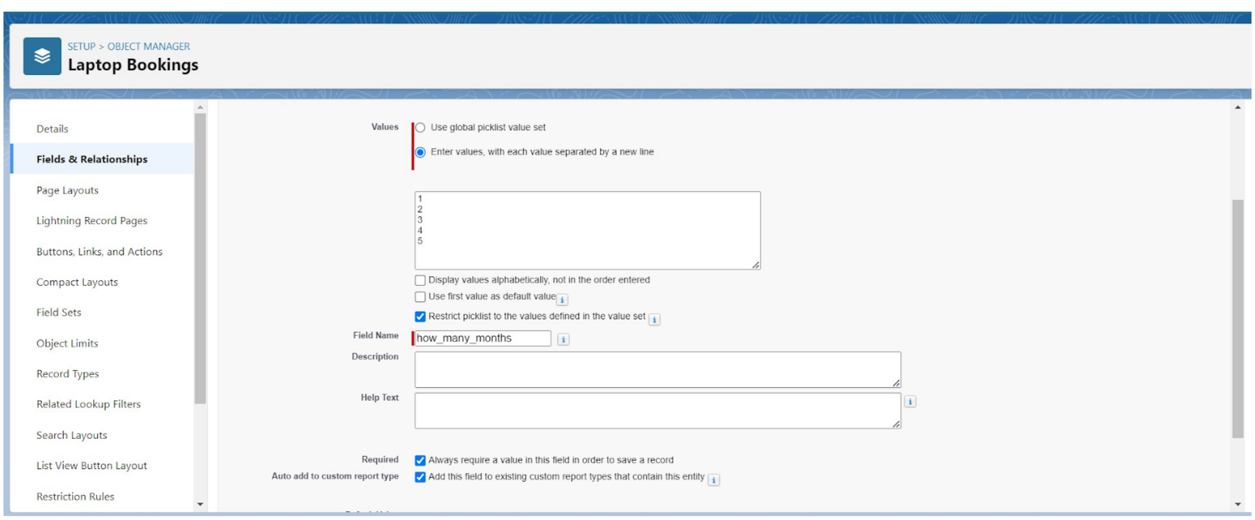
1.Go to setup >> click on Object Manager >> type object name(Laptop Booking) in the 2.search bar >> click on the object.

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

4.Select Data Type as a “picklist”

Picklist values are 1.2.3.4.5

Click and save it.



Creation of Fields & Relationships for Billing Process Object

1. To create fields & relationships to an object:

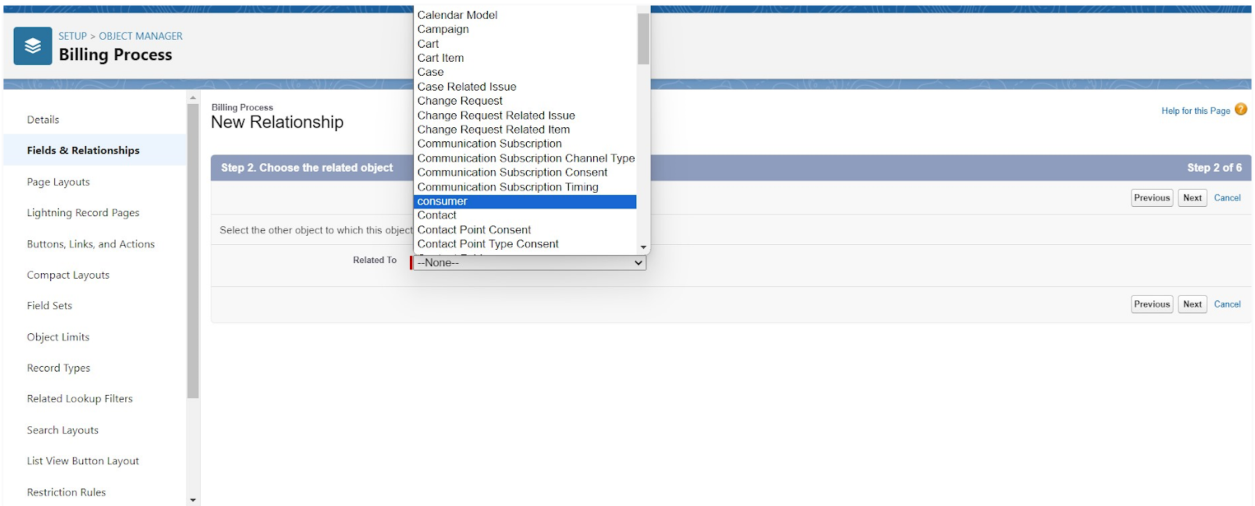
Go to setup >> click on Object Manager >> type object name(Billing Process) in the search bar >> click on the object.

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 field & relationship to an object:

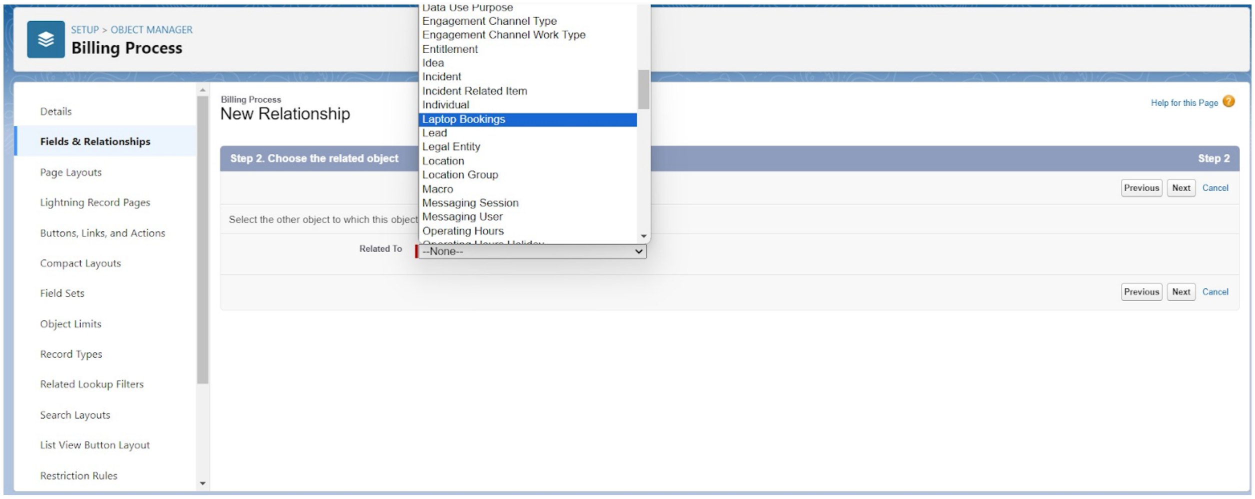
Go to setup >> click on Object Manager >> type object name(Billing Process) in the search bar >> click on the object.

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

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.

4. Create a Cross object formula Field in billing process 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

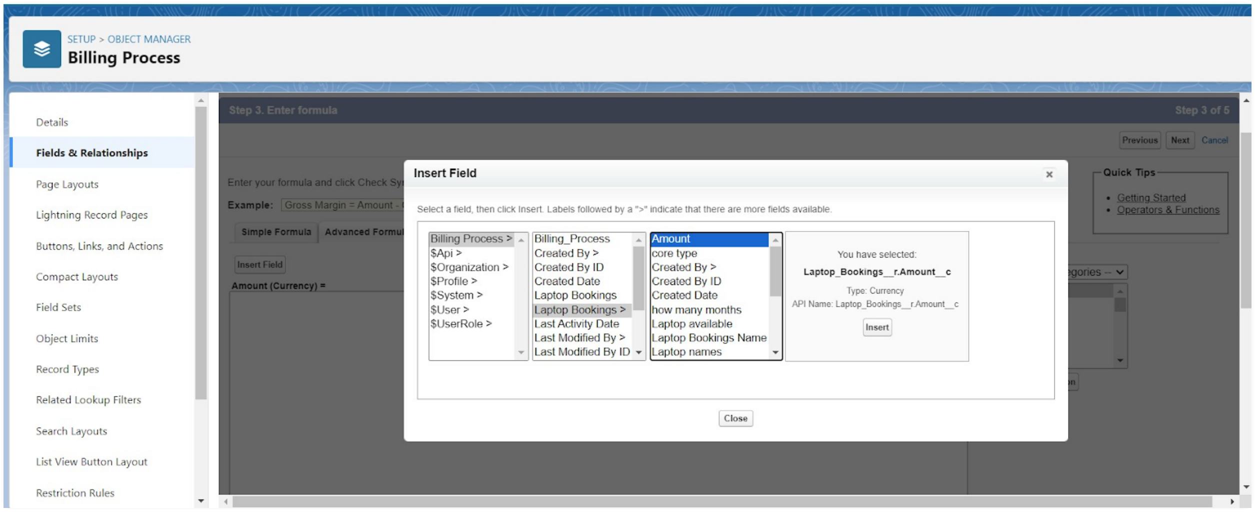
Select Data Type as a "Formula"

Click on Next

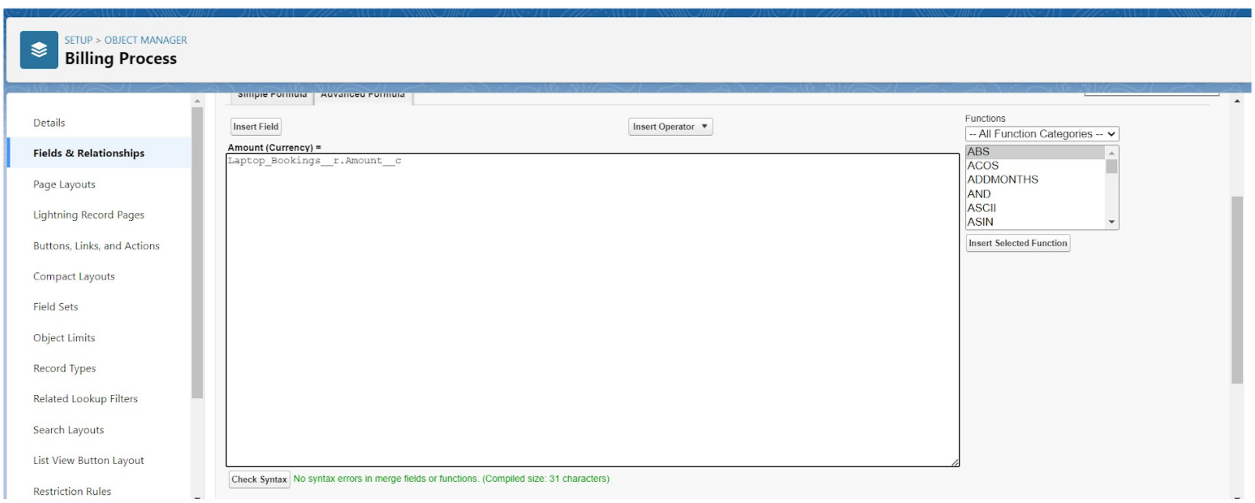
Enter the Field label: Amount, the Field name gets auto generated, and click on Next.(Formula return type Number).

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
“ Laptop_Booking__r.Amount__c ”.
Click on the Check syntax: No syntax errors in merge fields

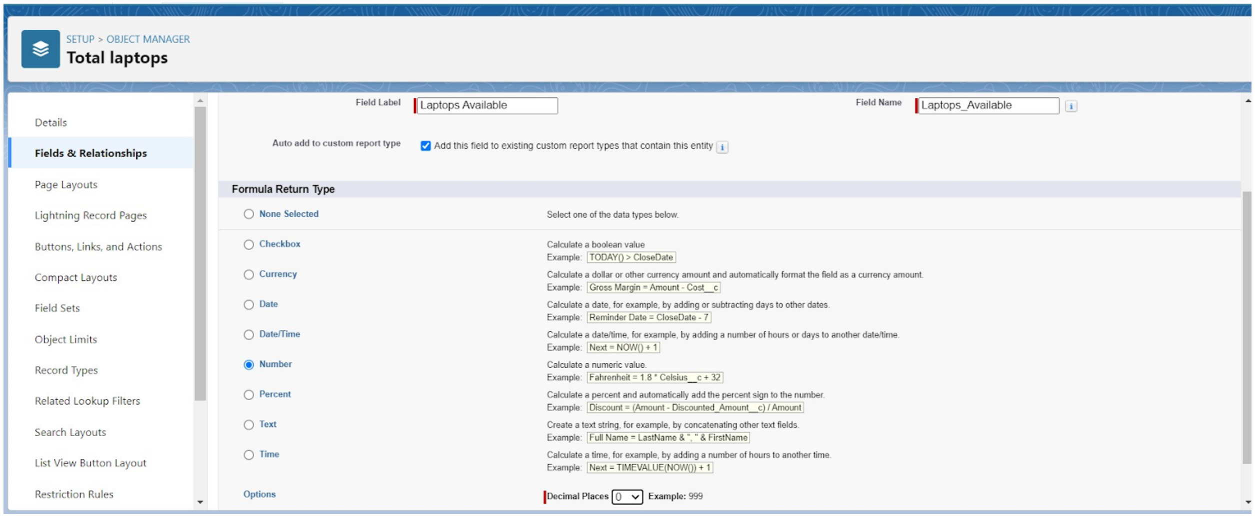


Click on Next >> Next >> Save and new.



Creating the field in the Total Laptops object

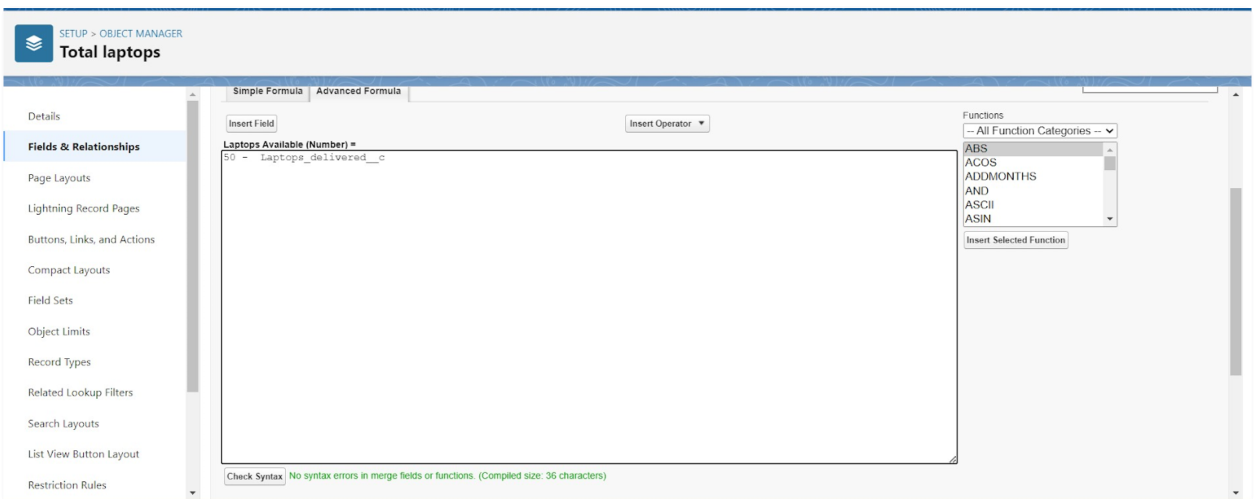
1. To create fields in an object:
Go to setup >> click on Object Manager >> type object name(Total Laptops) in search bar >> click on the object.
Now click on “Fields & Relationships” >> New
Select Data type as a “Formula” and Click on Next
Fill the Above as following:
Field Label: Laptops Available
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 “ 50 - Laptops_delivered__c ” and Check Syntax



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

Validation rule:

Validation rules are applied when a user tries to save a record and are used to check if the data meets specified criteria. If the criteria are not met, the validation rule triggers an error message and prevents the user from saving the record until the issues are resolved.

Improve the quality of your data using validation rules. Validation rules verify that the data a user enters in a record meets the standards you specify before the user can save the record. A validation rule can contain a formula or expression that evaluates the data in one or more fields and returns a value of “True” or “False”. Validation rules also include an error message to display to the user when the rule returns a value of “True” due to an invalid value.

Creating the validation rule for the phone number field in the consumer object

Creating the validation rule for the phone number field in the consumer object

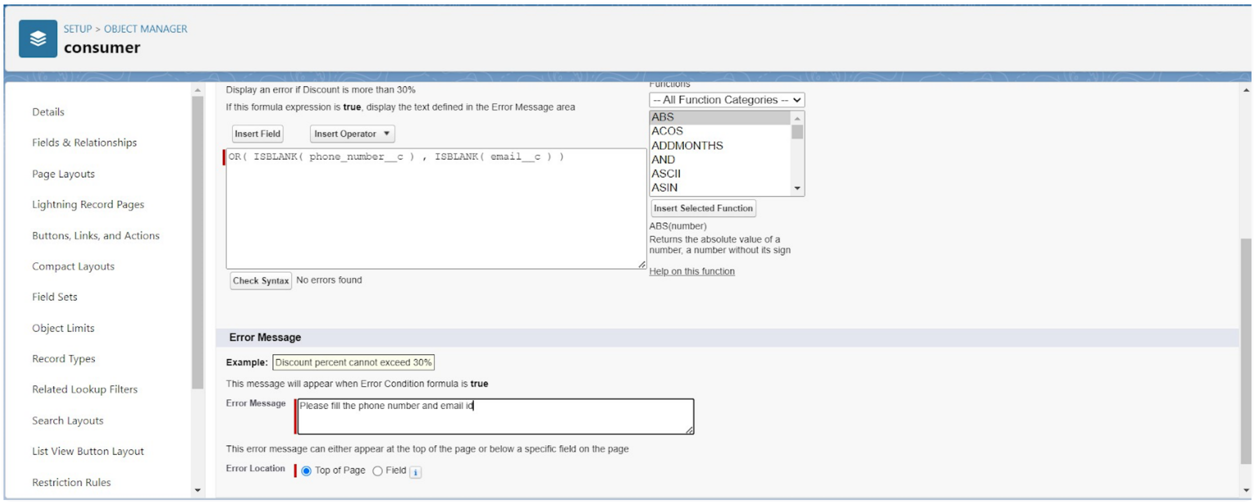
Go to the setup page >> click on the object manager >> From the drop down, click edit for consumer object.

Click on the validation rule >> click New.

Enter the Rule name as “Phone number or email blank rule”.

Enter the description as “phone number and email number should not be blank”.

Enter the formula as “OR(ISBLANK(phone_number__c) , ISBLANK(email__c))” and check the syntax.



Save the validation rule.

Profiles:

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

Types of profiles in salesforce

Standard profiles:

By default, Salesforce provides below-standard profiles.

Contract Manager

Read Only

Marketing User

Solutions Manager

Standard User

System Administrator.

We cannot delete standard ones

Each of these standard ones includes a default set of permissions for all of the standard objects

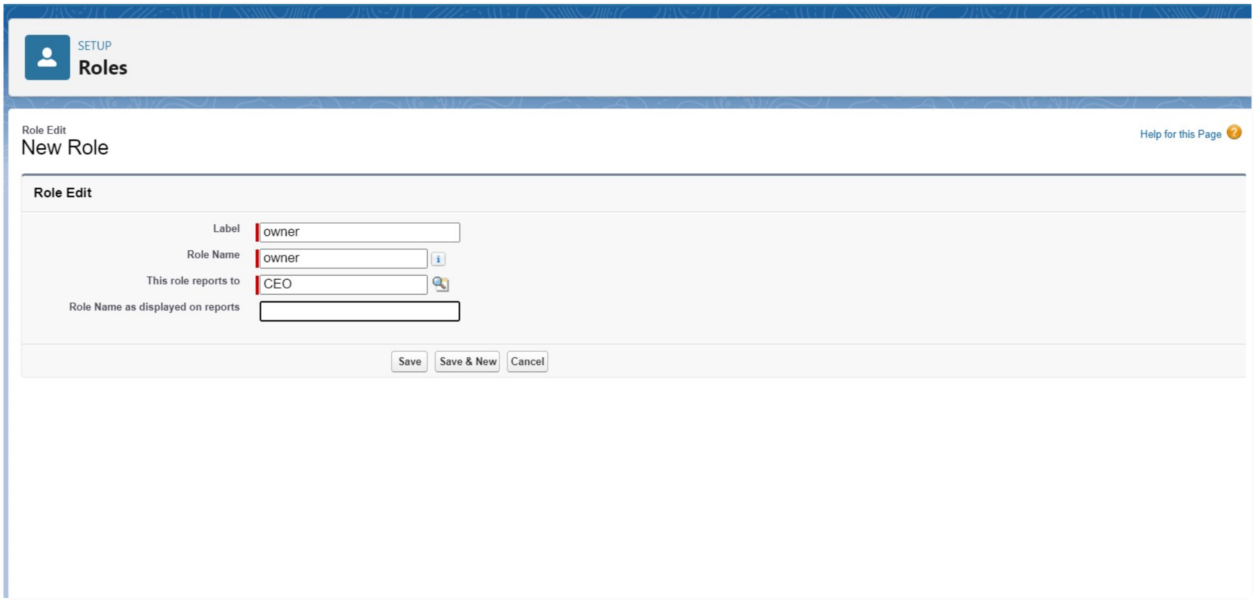
available on the platform.
Custom Profiles:
Custom ones defined by us.
They can be deleted if there are no users assigned to that particular one.
owner Profile
To create a new profile:
Go to setup >> type profiles in the quick find box >> click on profiles >> clone the desired profile (Standard User) >> enter profile name (owner) >> Save.

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

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

Roles and Hierarchy:

A role in Salesforce defines a user's visibility access at the record level. Roles may be used to specify the types of access that people in your Salesforce organization can have to data. Simply put, it describes what a user could see within the Salesforce organization.
Creating owner Role
Creating owner Role:
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.
Give Label as “owner” and Role name gets auto populated. Then click on Save.



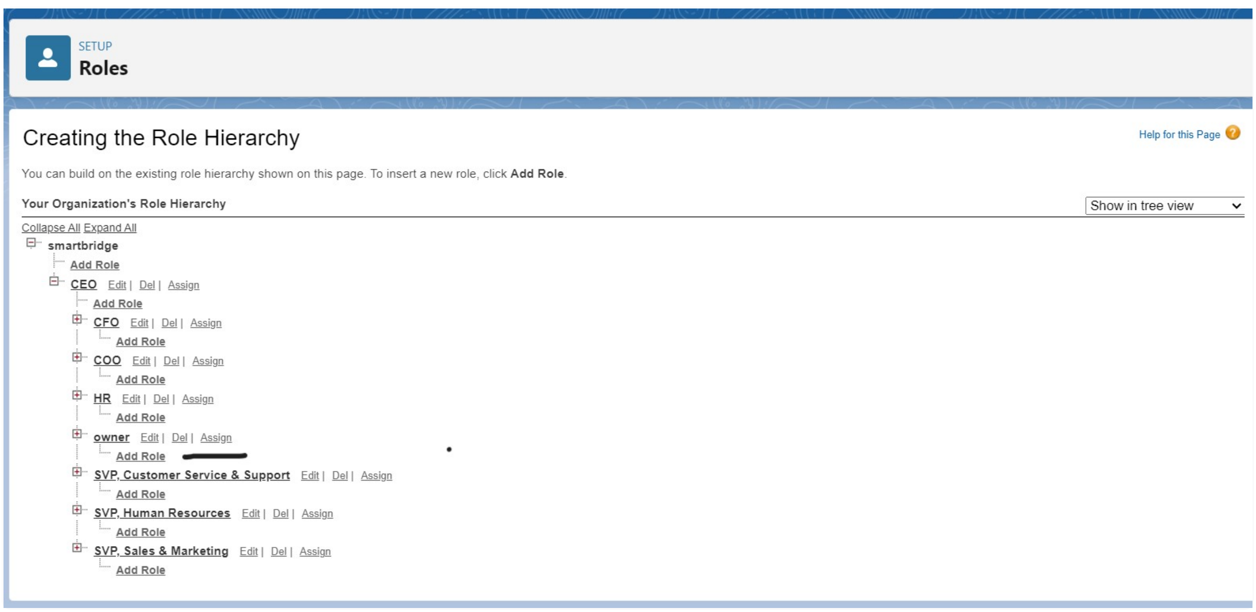
Click and save it.

Activity 2: Creating Agent roles

Creating another two roles under the manager

Go to quick find - Search for Roles - click on set up roles.

Click plus on the CEO role, and click add role under owner.



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

Users:

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access.

Create User

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

Fill in the fields

First Name : Vicky

Last Name : y

Alias : Give an Alias Name

Email id : Give your Personal Email id

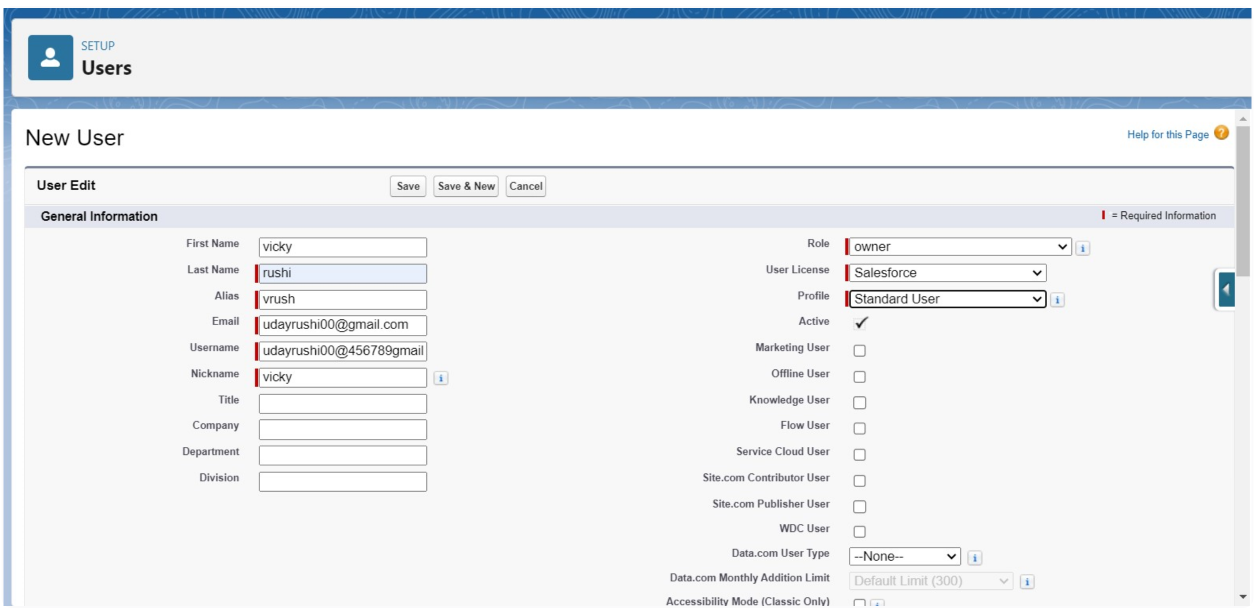
Username : Username should be in this form: text@text.text

Nick Name : Give a Nickname

Role : owner

User license : Salesforce

Profiles : owner.



Save it.

Activity 2: creating another user

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

Fill in the fields

First Name : ram

Last Name : ram

Alias : Give an Alias Name

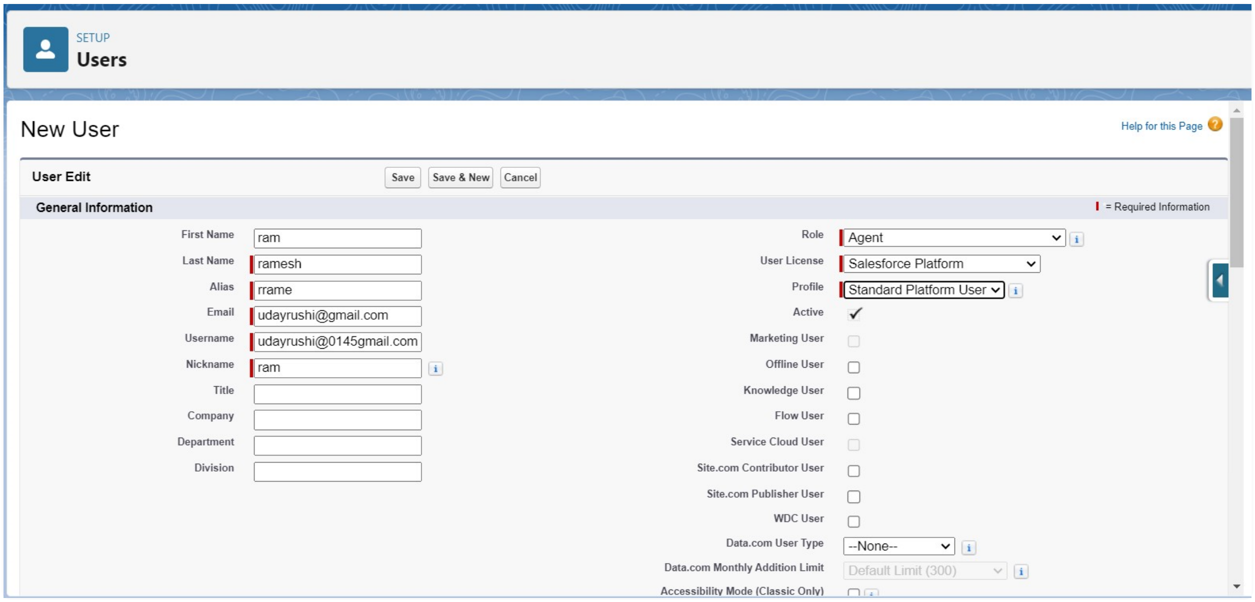
Email id : Give your Personal Email id

Username : Username should be in this form: text@text.text

Nick Name : Give a Nickname

Role : Agent

User license : Salesforce platform
Profiles : standard platform user.



Save it.

Flows:

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

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

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

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

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

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

Scheduled Flows: These are flows that you can schedule to run at specific times or intervals.

They are often used for automating recurring tasks.

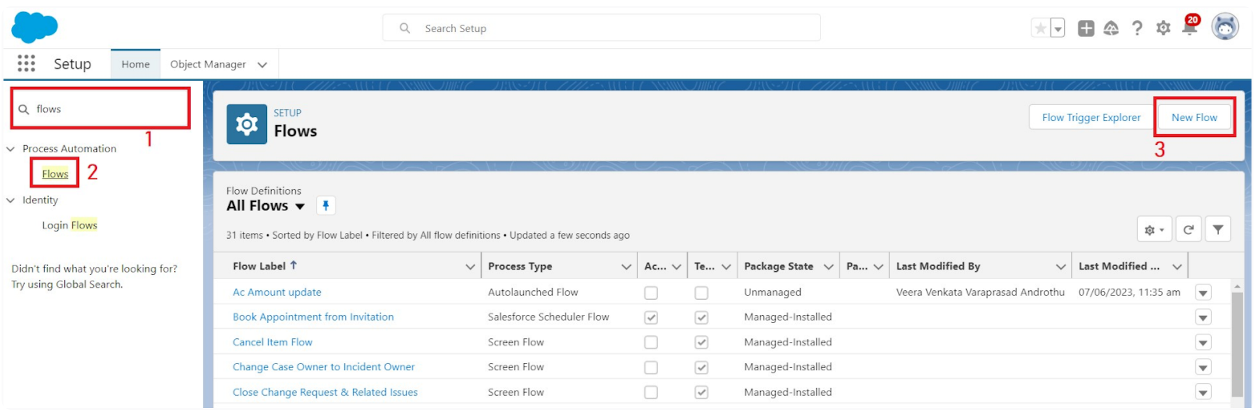
Flow Elements: Flow Builder offers various elements that you can use to create flows, such as variables, decisions, loops, and more. These elements allow you to build sophisticated logic into your flows.

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

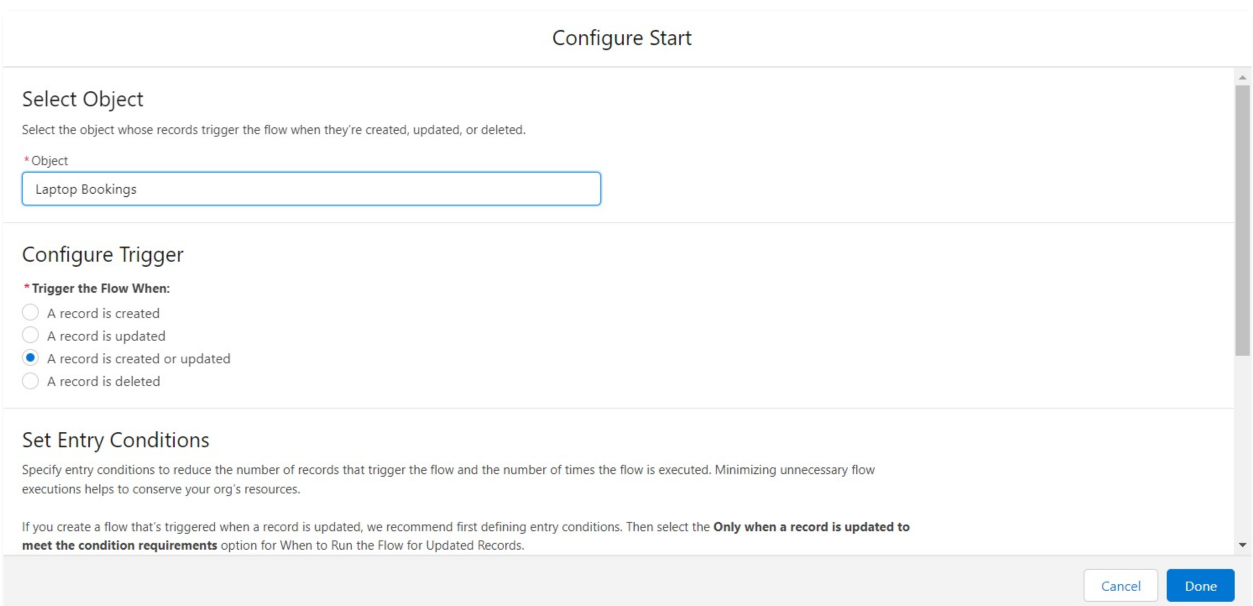
Record-Triggered Flows: These are flows that are triggered when records meet specified criteria. They are often used for automating record updates and related actions.

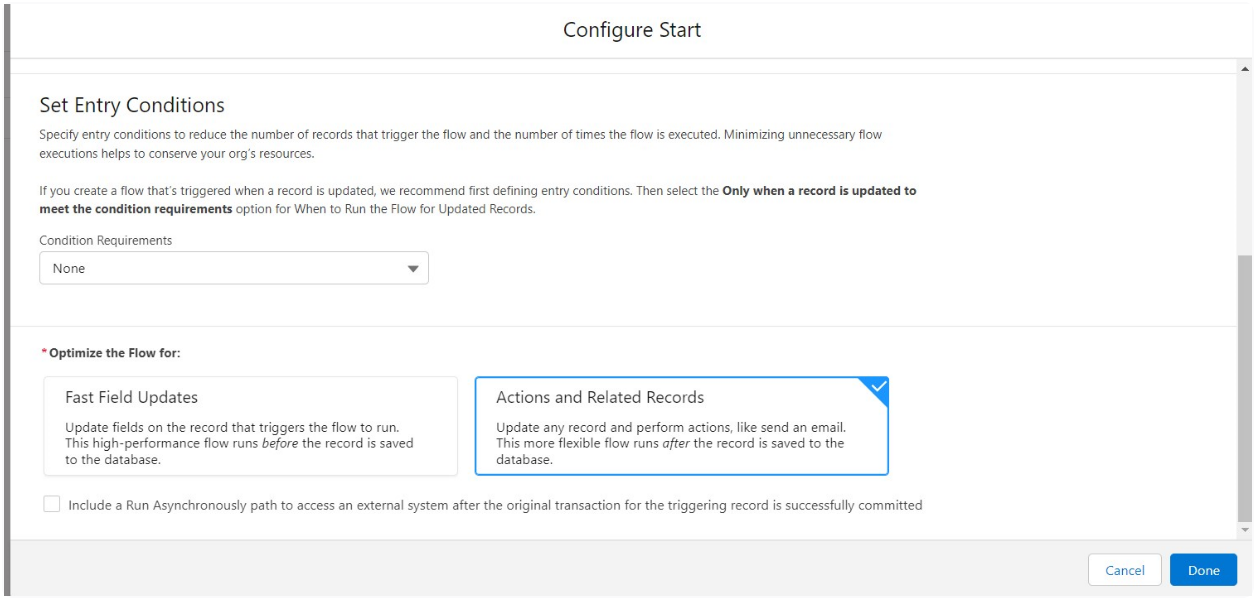
Activity -

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

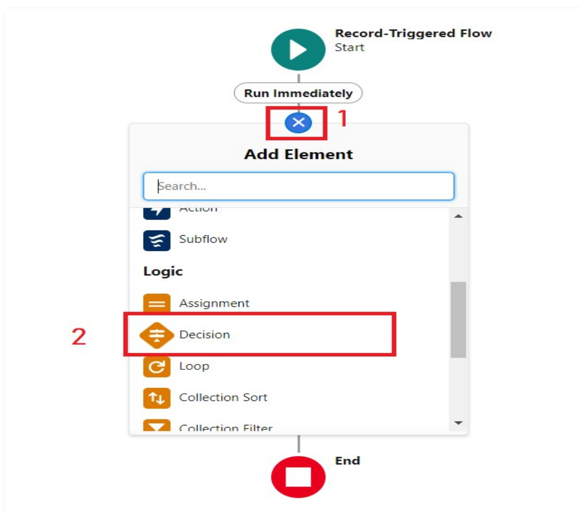


- Select the Object as a Laptop Booking in the Drop down list.
- Select the Trigger Flow when: "A record is Created or Updated".
- Select the Optimize the flow for: "Actions and Related Records" and Click on Done.



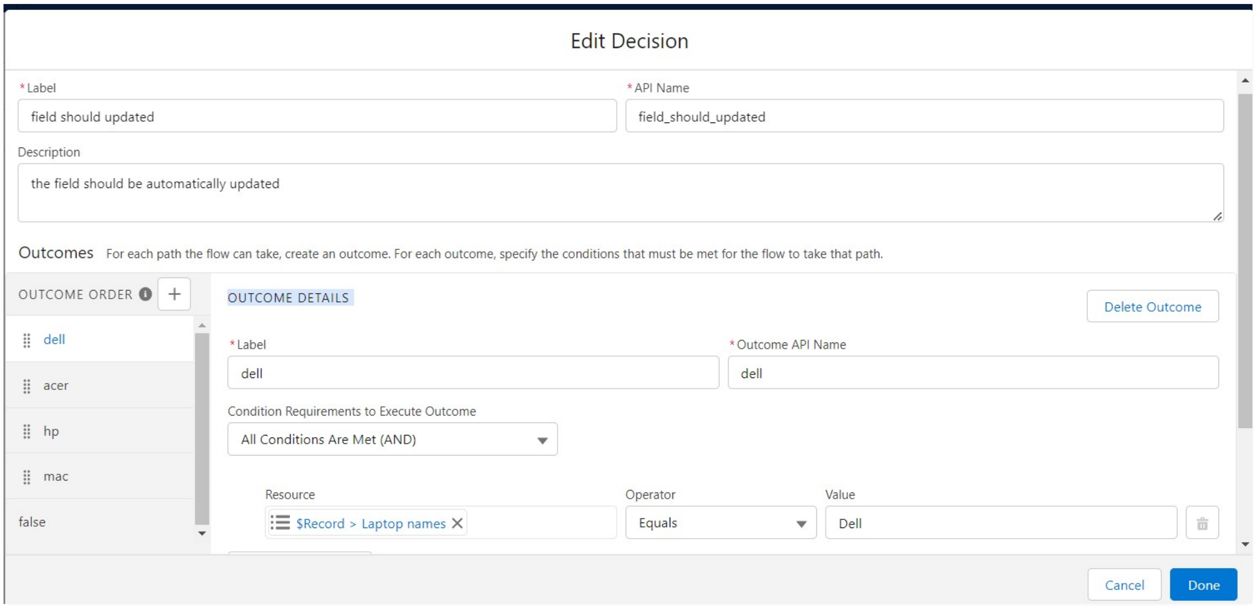


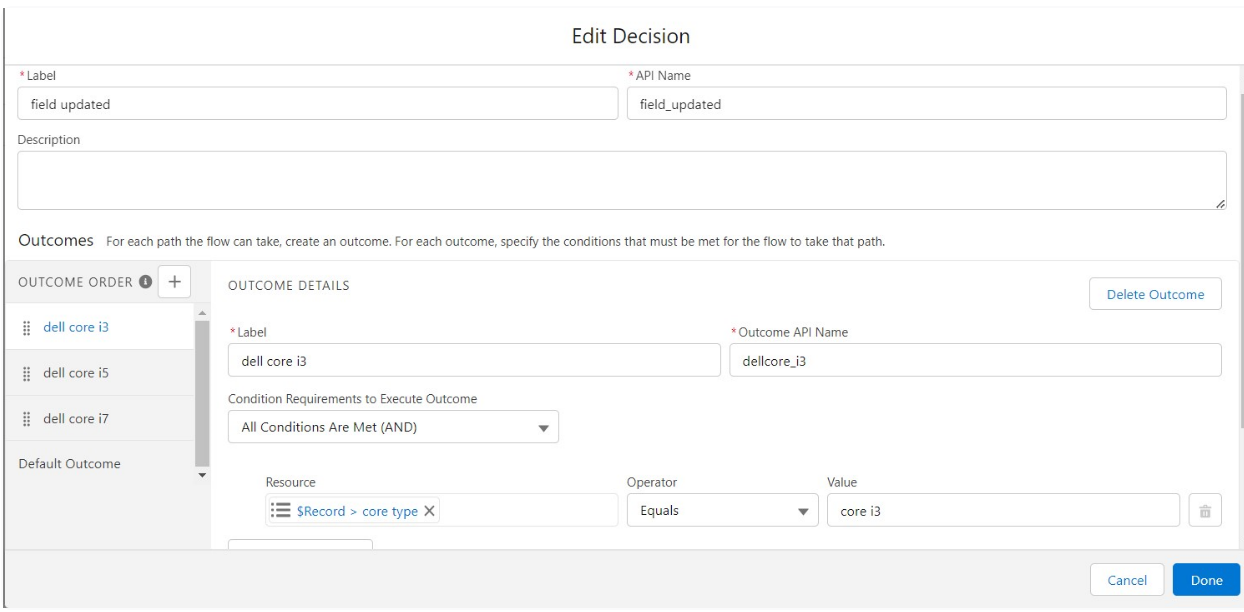
- Under the Record-triggered Flow Click on "+" Symbol and In the Drop down List select the "DecisionElement".



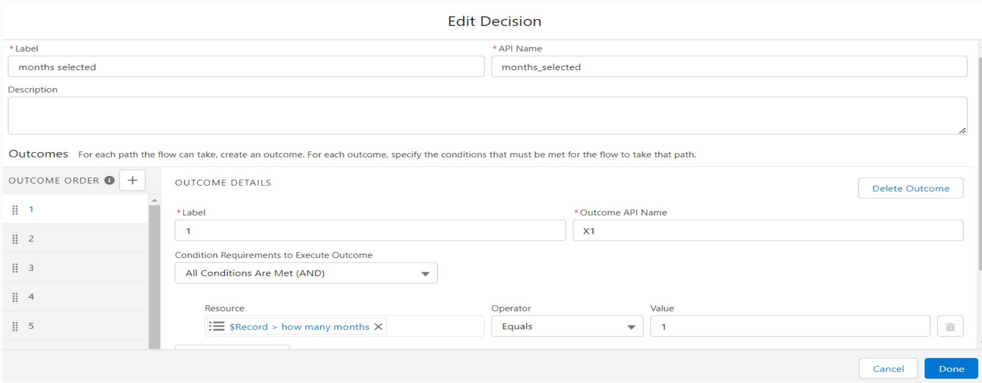
- Enter the Details Label: Field should be Updated, API name: Gets Automatically Generated.
- Enter the Outcome Details Label: dell, Outcome API name: Gets Automatically Generated.
- Resource: Select Record.Laptop booking__c.
- Operator: Select Equals.
- Value: Select Dell
- Add the same outcome order to acer , hp,mac.

Click done.

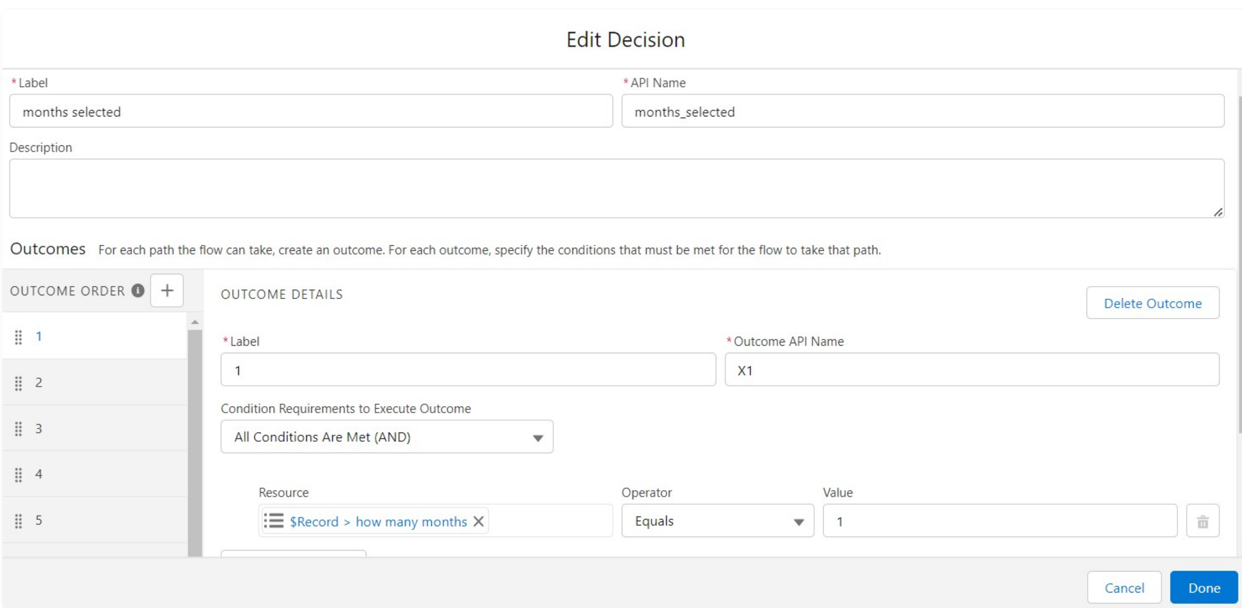




- So go to the flow page select '+' after core i3 then again select the decision.
- Enter the Details Label: months selected, API name: Gets Automatically Generated.
- Enter the Outcome Details Label: dell 1(i3) , Outcome API name: Gets Automatically Generated.
- Resource: Select Record.how many months.
- Operator: Select Equals.
- Value: 1.
- Enter the Outcome Details Label: dell 2(i3) , Outcome API name: Gets Automatically Generated.



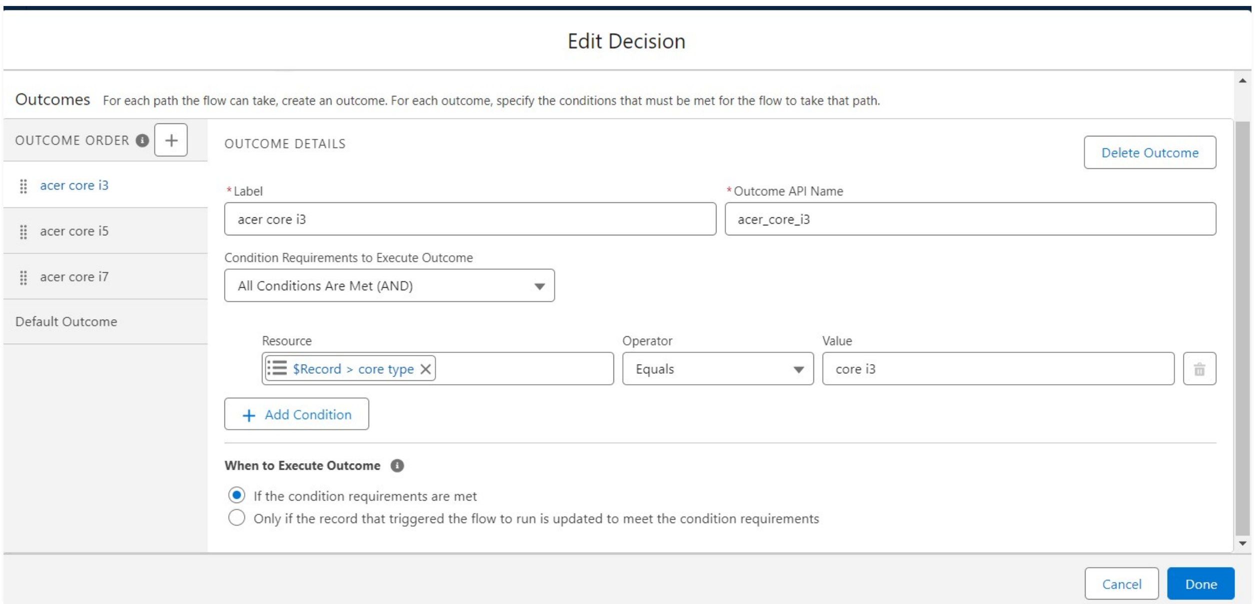
- Follow the above picture, and you will understand.
- After dell 1(i3) there is ‘+’ symbol like dell 2(i3),dell 3(i3),dell 4(i3),dell 5(i3).
- Click on ‘+’ then select update records
- Enter the Details Label: one month of Dell I3 rate , API name: Gets Automatically Generated.
- Field:- Amount__c , value:- for dell 1(i3)-1000, dell 2(i3)-2000, dell 3(i3)-3000, dell 4(i3)-4000, dell 5(i3)-5000. Follow for all these finally
- Click done.



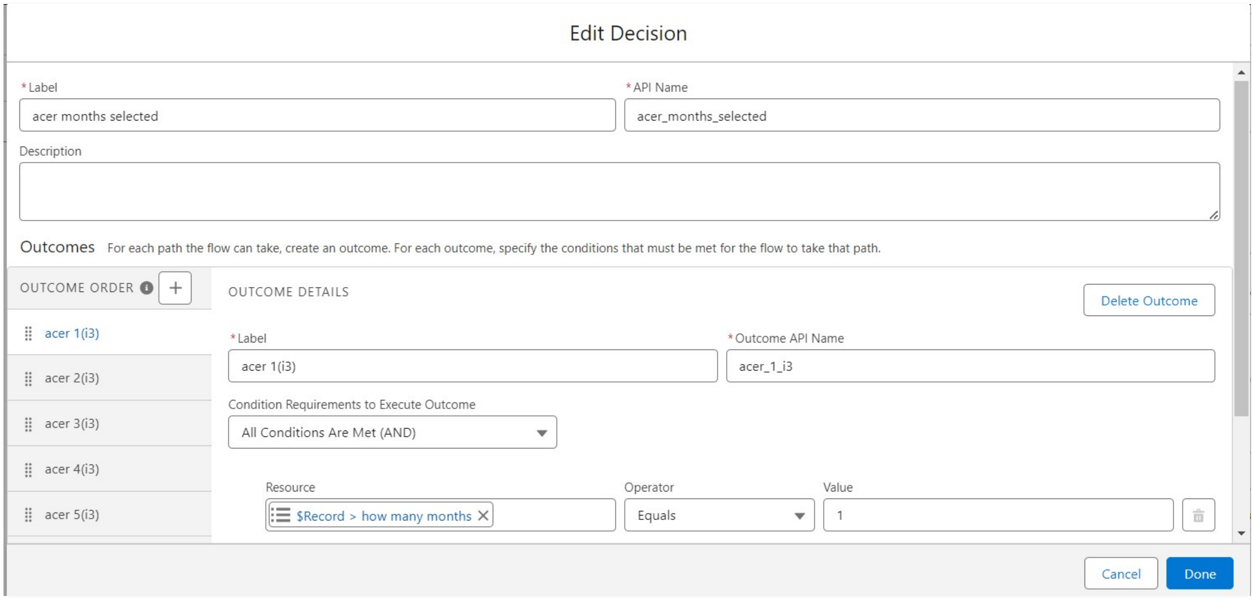
- Follow the above picture, and you will understand.
- After dell 1(i7) there is ‘+’ symbol like dell 2(i7),dell 3(i7),dell 4(i7),dell 5(i7).
- Click on ‘+’ then select update records
- Enter the Details Label: one month of Dell I5 rate , API name: Gets Automatically Generated.
- Field:- Amount__c , 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

- Click done.

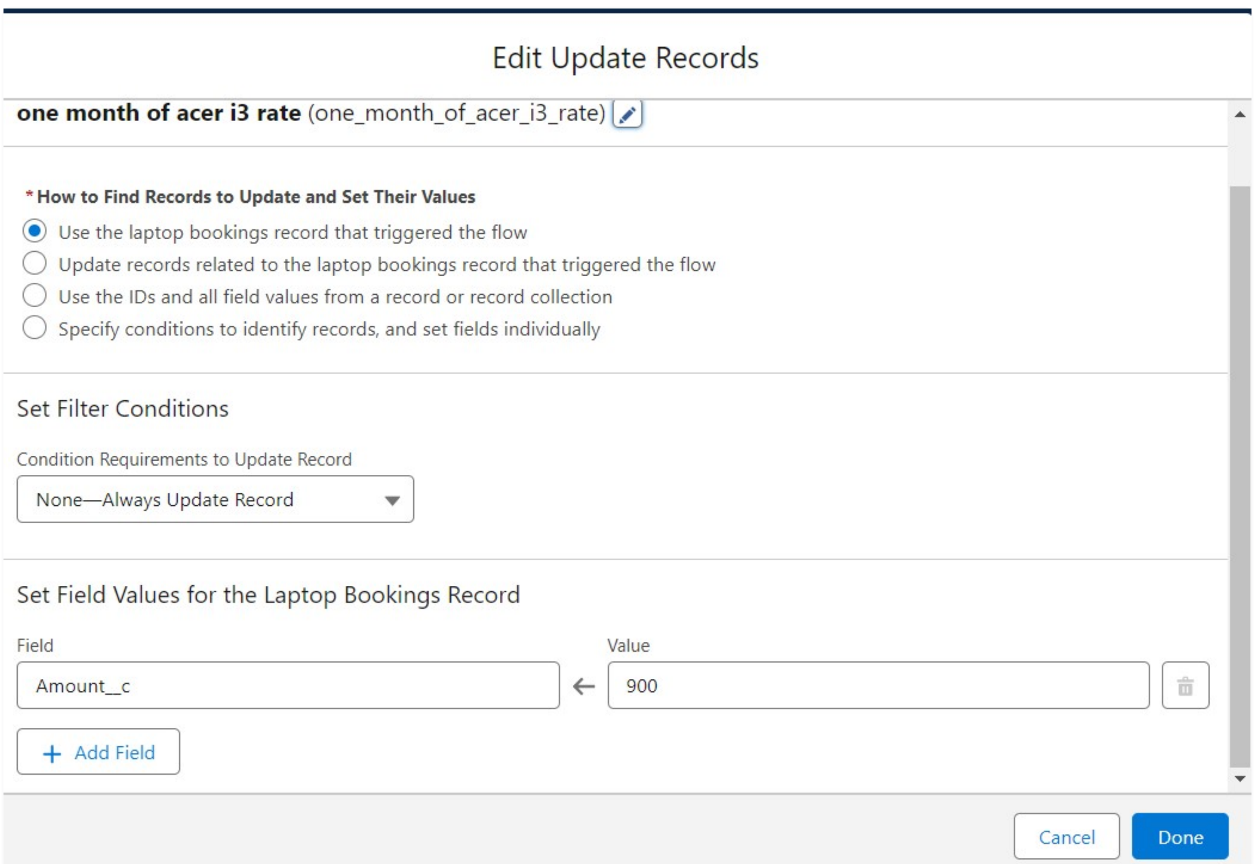
creating flow on Acer laptop

1. Go to the flow page
2. Beside acer there is a symbol ‘+’ click on that.
3. Again, select decision
4. Enter the Details Label: Field is Update, API name: Gets Automatically Generated.
5. select the Outcome Details Label: acer core i3, Outcome API name: Gets Automatically Generated.
6. Resource: Select Record.core type.
7. Operator: Select Equals.
8. 

9. Beside dell there is a symbol ‘+’ click on that.
10. Again, select decision
11. Enter the Details Label: months selected, API name: Gets Automatically Generated.
12. Enter the Outcome Details Label: acer 1(i3) , Outcome API name: Gets Automatically Generated.
13. Resource: Select Record.how many months.
14. Operator: Select Equals.
15. Value: 1.

16. 

17. 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

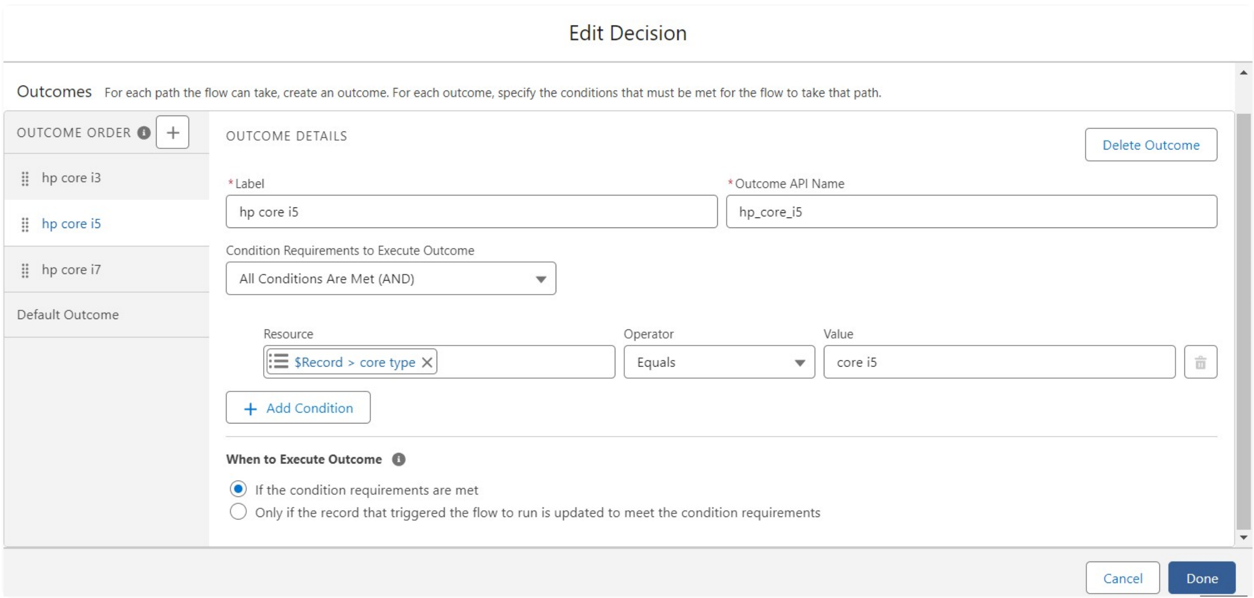


Click done.

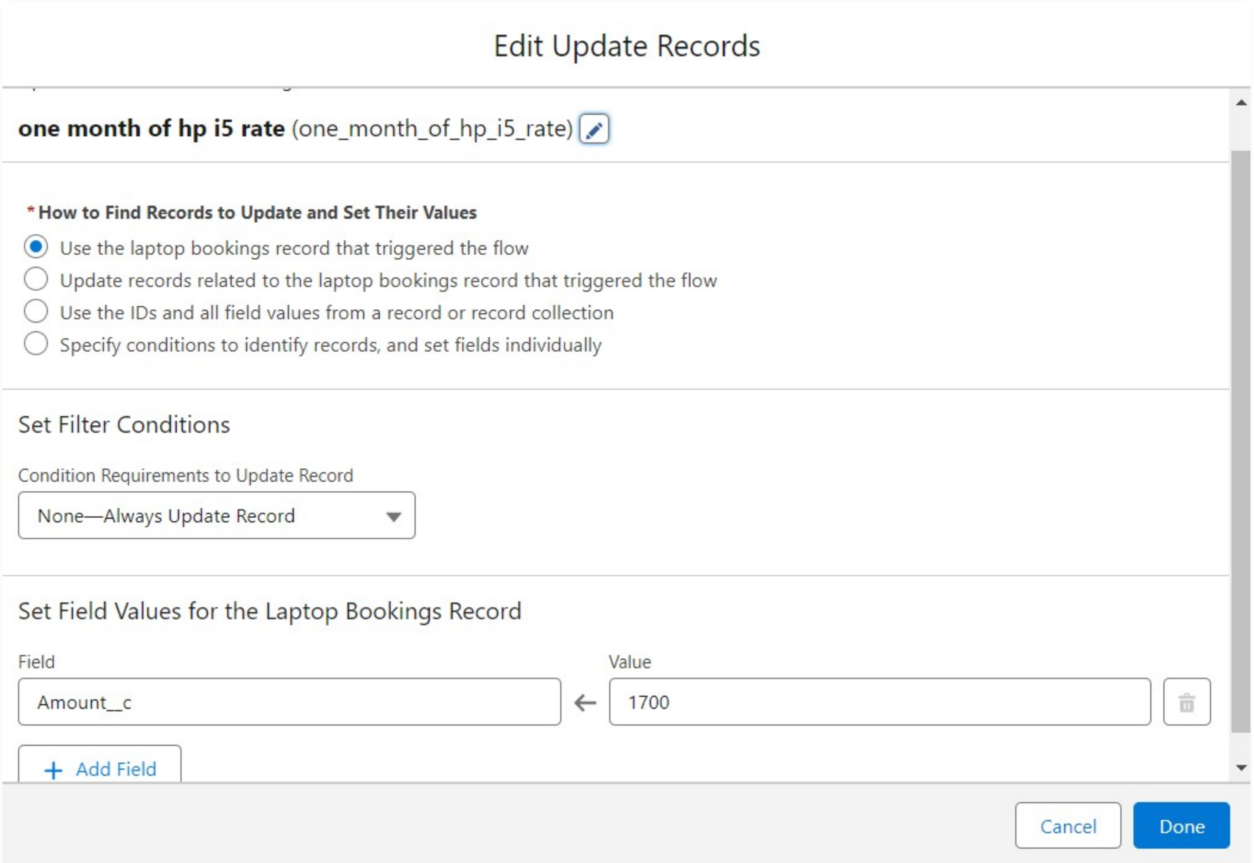
creating a flow on hp laptop:

1.Go to the flow page

2.Beside hp there is a symbol '+' click on that.
3.Again, select decision
4.Enter the Details Label: Field is Update, API name: Gets Automatically Generated. select the Outcome Details Label: hp core i5 , Outcome API name: Gets Automatically Generated.
Resource: Select Record.core type.
Operator: Select Equals.
Value: Select hp i5.
6.Beside hp there is a symbol '+' click on that.Again select decision
7.Enter the Details Label: hp field should be updated , API name: Gets Automatically Generated.
8.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.



9.After hp 1(i5) there is '+' symbol like hp 2(i5), hp 3(i5), hp 4(i5),hp 5(i5).
10.Click on '+' then select update records
11.Enter the Details Label: one month of hp i5 rate , API name: Gets Automatically Generated.
Field:- Amount__c , value:- for hp 1(i5)-1700, hp 2(i5)-3400, hp 3(i5)-5100, hp 4(i5)-6800, hp5(i5)-8500.



12.Click done.

creating a flow on mac laptop

1.Go to the flow page

2.Beside mac there is a symbol '+' click on that.

3.Again, select decision

4.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

5.Beside Mac there is a symbol '+' click on that.Again select decision

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

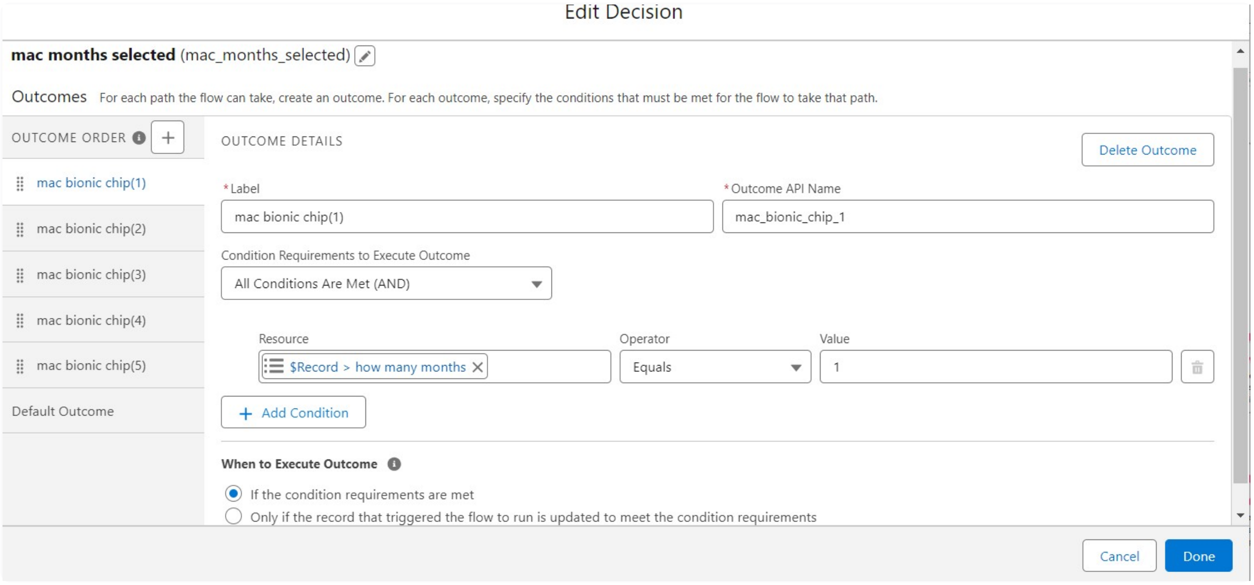
7.Enter the Outcome Details Label: mac bionic chip(1) , Outcome API name: Gets Automatically Generated.

Resource: Select Record.how many months.

Operator: Select Equals.

Value: 1.

5.



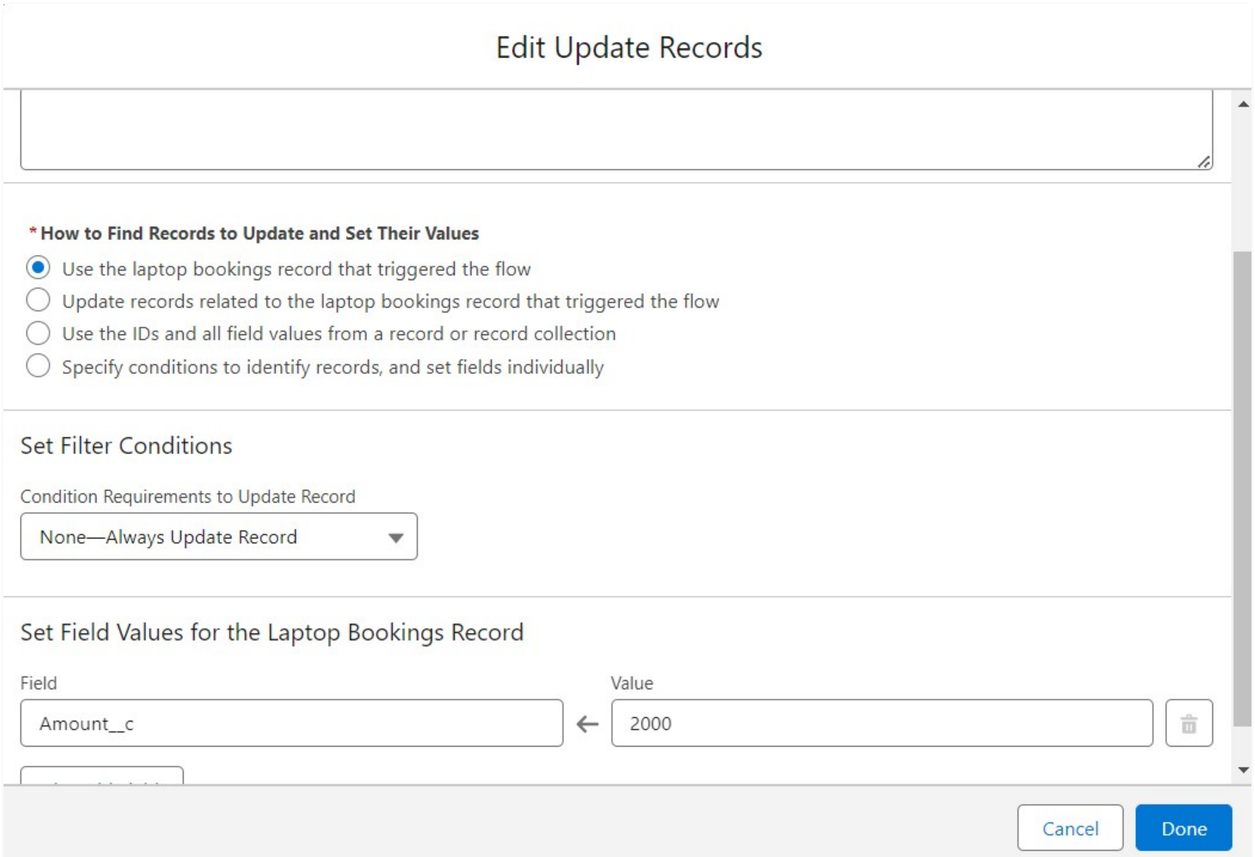
8.Click done.

9.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).

10.Click on '+' then select update records

11.Enter the Details Label: one month of mac rate, API name: Gets Automatically Generated.

12.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



13.Click done.

APEX

Apex OverView

Apex is a strongly typed, object-oriented programming language that allows developers to execute flow and transaction control statements on the Lightning platform server in conjunction with calls to the Lightning Platform? API. Using syntax that looks like Java and acts like database stored procedures, Apex enables developers to add business logic to most system events, including button clicks, related record updates, and Visualforce pages. Apex code can be initiated by Web service requests and from triggers on objects.

It is as similar as java i.e, it also supports OOP(Object oriented programming) like Classes, objects, methods.

Creating Classes :

Apex classes are modeled on their counterparts in Java. You’ll define, instantiate, and extend classes, and you’ll work with interfaces, Apex class versions, properties, and other related class concepts.

Class:

As in Java, you can create classes in Apex. A class is a template or blueprint from which objects are created. An object is an instance of a class.

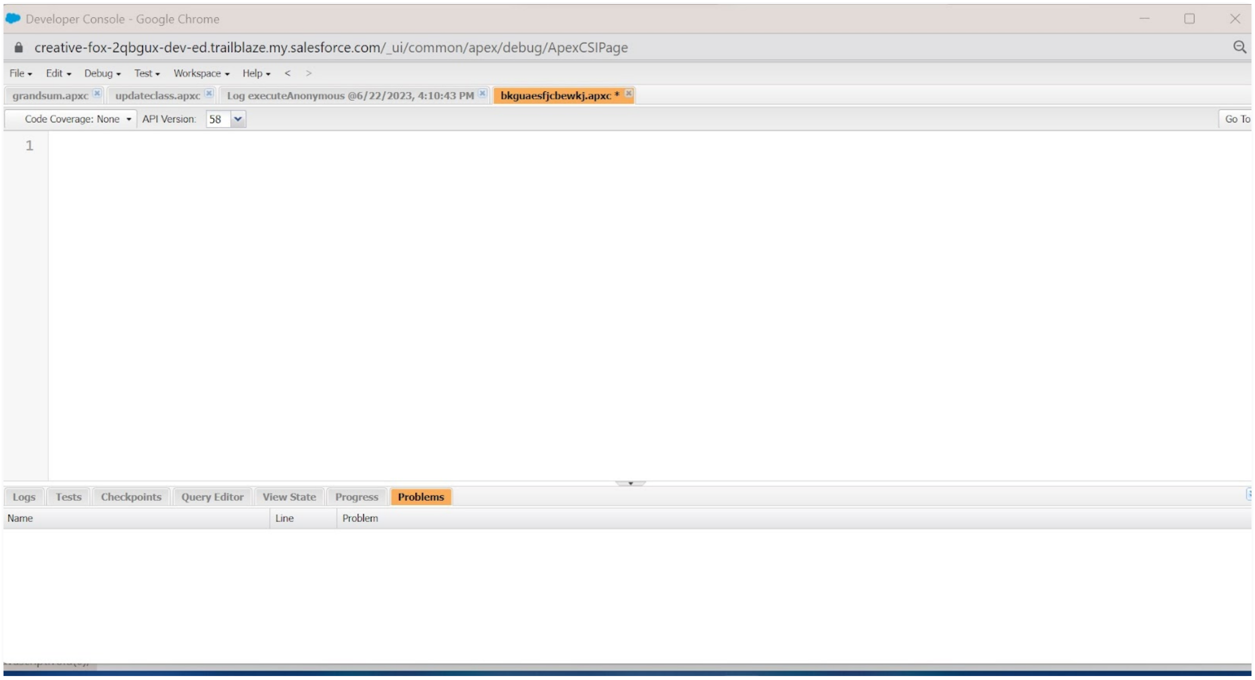
Object

Object is an instance of a class, where it can access all the properties that are present in a class i.e, variables and methods.

Steps to create a class in APEX:

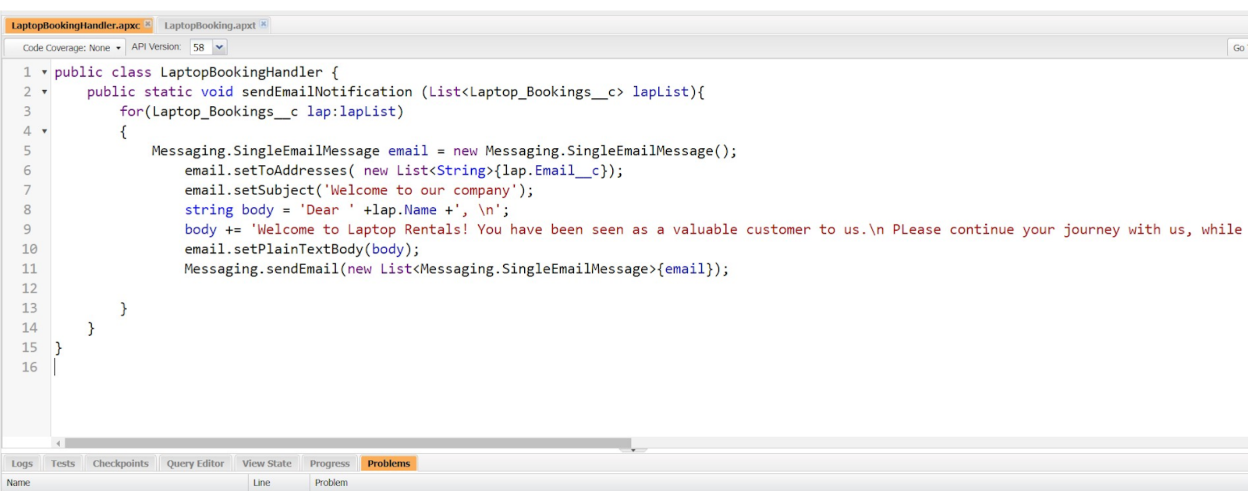
Login to the trailhead account and navigate to the gear account in the top right corner.

Then we can see the Developer console. Click on the developer console, and you will navigate to a new console window.



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

Enter the name of the class to create a new class file.



Access specifiers in Apex :

Apex allows you to use the private, protected, public, and global access modifiers when defining methods and variables.

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

Private:

This access modifier is the default, and means that the method or variable is accessible only within the Apex class in which it’s defined. If you don’t specify an access modifier, the method or variable is private.

Protected:

This means that the method or variable is visible to any inner classes in the defining Apex class and to the classes that extend the defining Apex class. You can only use this access modifier for instance methods and member variables. This setting is strictly more permissive than the default (private) setting, just like Java.

Public :

This means that the method or variable is accessible by all Apex within a specific package. For accessibility by all second-generation (2GP) managed packages that share a namespace, use public with the @NamespaceAccessible annotation. Using the public access modifier in no-namespace packages implicitly renders the Apex code as @NamespaceAccessible.

Global:

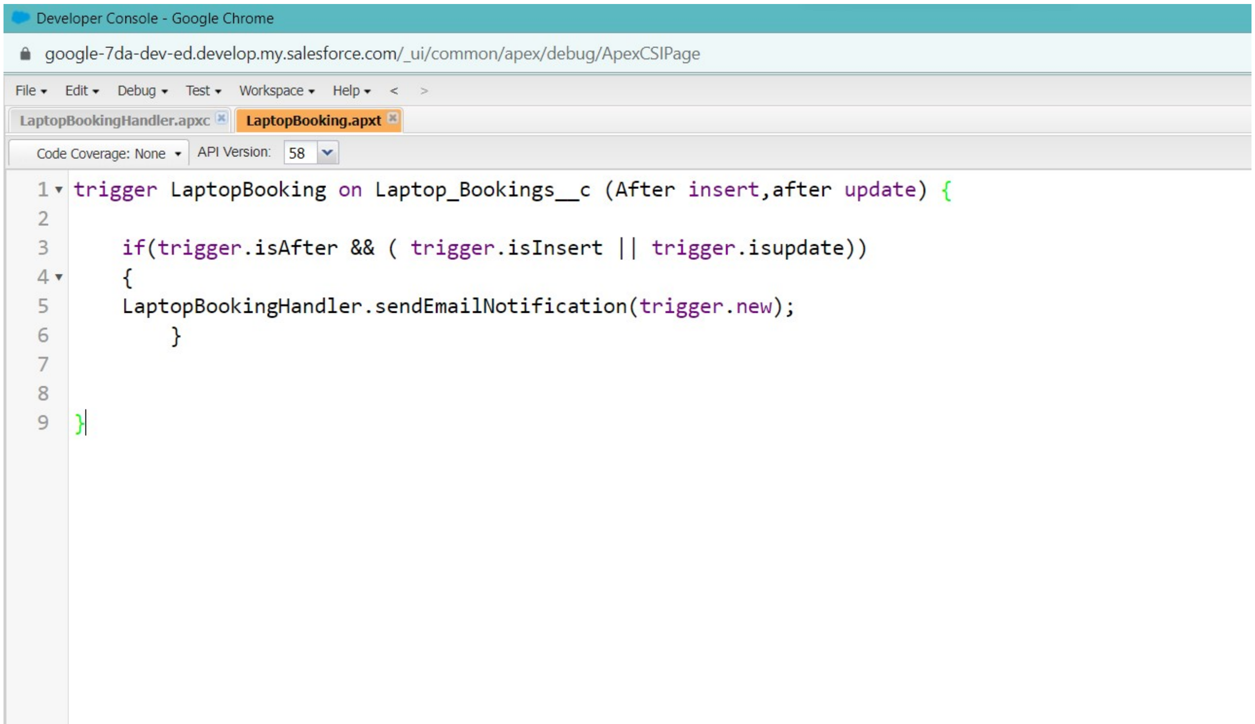
This means the method or variable can be used by any Apex code that has access to the class, not just the Apex code in the same application. This access modifier must be used for any method that must be referenced outside of the application, either in SOAP API or by other Apex code. If you declare a method or variable as global, you must also declare the class that contains it as global.

Triggers :

A trigger is a set of Apex code that runs before or after DML(Data Manipulation Language) events.

A DML event could be a variety of data processing tasks that include the standard insert, update, and delete commands.

With Apex triggers, you can automate tasks that would otherwise be nearly impossible to accomplish using only the Salesforce user interface. Triggers enable you to create custom scripts that you can implement according to your needs, and the only limitation is your coding skills.



Create Report

Go to the app -click on the reports tab

Click New Report.

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

4.Customize your report

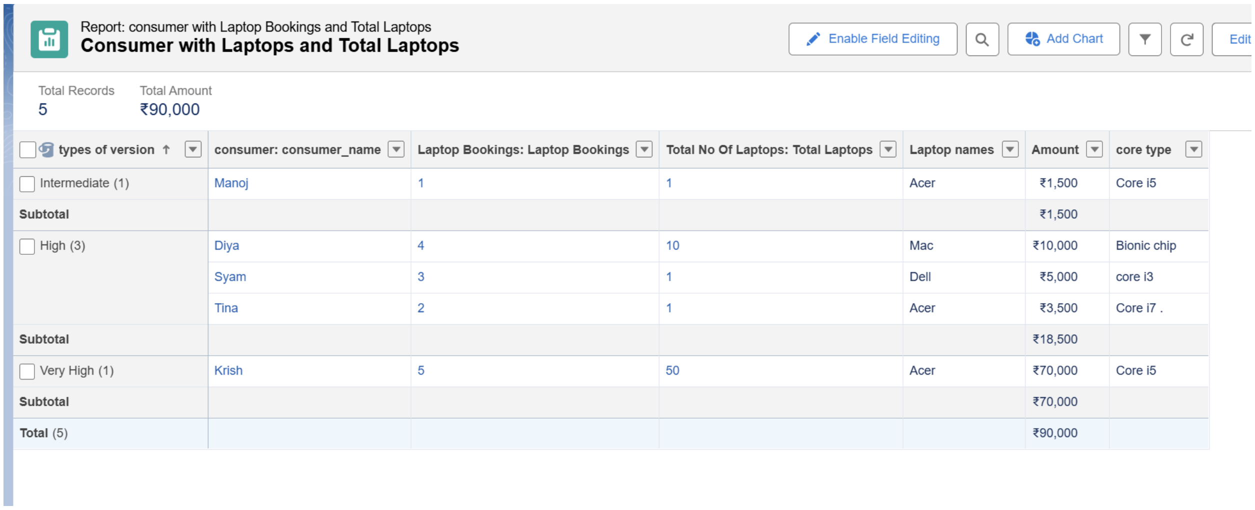
5.Add fields from the left pane as shown below

Follow the above image to group rows and columns.

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

Click apply it.

Follow the picture and save or run it.



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

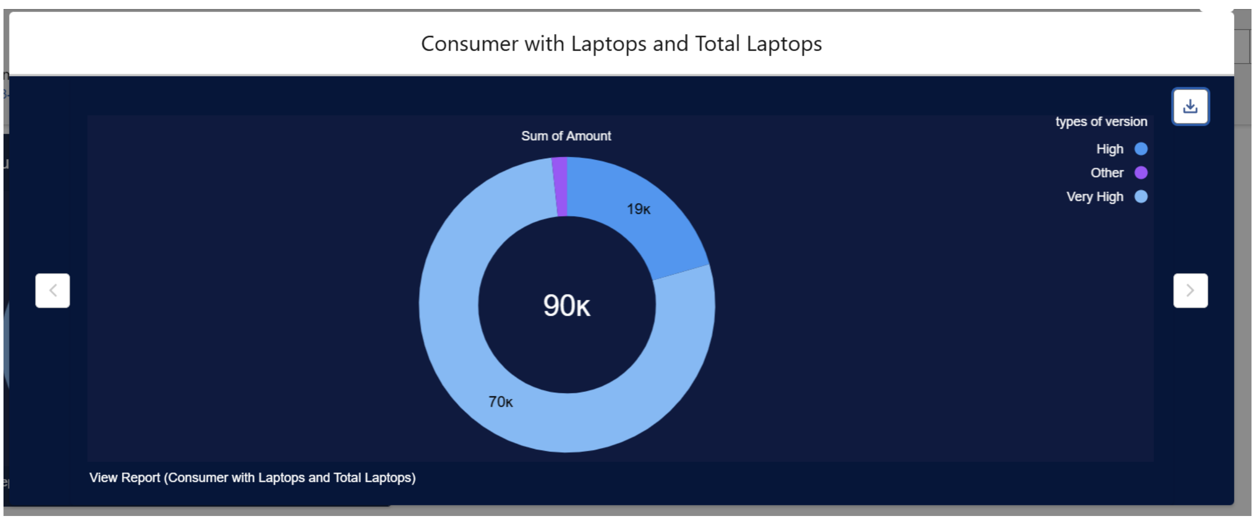
Enable Field Editing | Add Chart | Edit

Total Records 5 | Total Amount ₹90,000

types of version	consumer: consumer_name	Laptop Bookings: Laptop Bookings	Total No Of Laptops: Total Laptops	Laptop names	Amount	core type
Intermediate (1)	Manoj	1	1	Acer	₹1,500	Core i5
Subtotal					₹1,500	
High (3)	Diya	4	10	Mac	₹10,000	Bionic chip
	Syam	3	1	Dell	₹5,000	core i3
	Tina	2	1	Acer	₹3,500	Core i7 .
Subtotal					₹18,500	
Very High (1)	Krish	5	50	Acer	₹70,000	Core i5
Subtotal					₹70,000	
Total (5)					₹90,000	

Dashboards

Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities. Before building, reading, and sharing dashboards, review these dashboard basics.



Thank You