

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.

The image consists of two side-by-side screenshots. On the left, a computer monitor displays a software application window titled 'App Builder'. The window shows a hierarchical tree structure on the left and a canvas area with various colored icons representing different data entities. On the right, there is a separate sign-up form for the 'Salesforce Developer Edition'. The form features the Salesforce logo at the top, followed by the heading 'Sign up for your Salesforce Developer Edition' and the subtext 'A full-featured copy of the Platform, for free'. Below this, there is a descriptive message: 'Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.' The form itself contains several input fields: 'First Name*' with placeholder 'Your first name', 'Last Name*' with placeholder 'Your last name', 'Email*' with placeholder 'Your email address', 'Role*' with placeholder 'Your job role' (a dropdown menu), and 'Company*' with placeholder 'Company Name'.

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.

6 Items, Sorted by Field Label			
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD
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.

SETUP > OBJECT MANAGER consumer			
Details	Fields & Relationships	Quick Find	New Deleted Fields I
Page Layouts	Address	Address_c	Text Area(255)
Lightning Record Pages	consumer_Status	consumer_Status__c	Picklist
Buttons, Links, and Actions	consumer_name	Name	Text(80)
Compact Layouts	Created By	CreatedById	Lookup(User)
Field Sets	Email	Email_c	Email
Object Limits	Last Modified By	LastModifiedById	Lookup(User)
Record Types	Owner	OwnerId	Lookup(User,Group)
Related Lookup Filters	Phone number	Phone_number__c	Phone
Search Layouts			
List View Button Layout			

Create Laptop Bookings Object

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

Object.

1) Enter the label name >> Laptop Bookings

2) Plural label name >> Laptop Bookings

3) Enter Record Name, Label, and Format

 Record Name >> Laptop Bookings

 Data Type >> Name

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

Allow search >> Save.

The screenshot shows the Salesforce Object Manager interface. The left sidebar has a 'Fields & Relationships' section selected. The main area is titled 'Fields & Relationships' with a subtitle '11 Items, Sorted by Field Label'. It lists various fields with their data types and descriptions:

Field	Type	Description
Amount	Currency(18, 0)	
core type	Picklist	Laptop names
Created By	Lookup(User)	
Email	Email	
how many months	Picklist	
Laptop Bookings	Name	Text(80)
Laptop names	Picklist	
Laptops Available	Formula (Number)	
Last Modified By	Lookup(User)	
Name	Master-Detail(consumer)	

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.

Fields & Relationships				
7 Items, Sorted by Field Label				
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLER
Page Layouts	Amount	Amount__c	Formula (Number)	
Lightning Record Pages	Billing ProcessName	Name	Text(80)	
Buttons, Links, and Actions	Created By	CreatedBy	Lookup(User)	
Compact Layouts	Laptop Bookings	Laptop_Bookings__c	Lookup(Laptop Bookings)	
Field Sets	Last Modified By	LastModifiedBy	Lookup(User)	
Object Limits	Name	Name__c	Master-Detail(consumer)	
Record Types	Payment Mode	Pa__c	Picklist	
Related Lookup Filters				
Search Layouts				

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.

The screenshot shows the 'New Custom Field' configuration screen for the 'consumer' object. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main form is titled 'Step 2. Enter the details' and contains the following fields:
 - Field Label: Email
 - Field Name: Email
 - Description: (empty)
 - Help Text: (empty)
 - Required: (unchecked)
 - Unique: (unchecked)
 - External ID: (unchecked)
 - Auto add to custom report type: (checked)
 - Default Value: Show Formula Editor

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.

The screenshot shows the Salesforce Object Manager interface for creating a new field. The object selected is 'consumer'. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, etc. The main area is titled 'Step 2. Enter the details' and shows the configuration for a new field named 'Address'. The 'Field Label' is set to 'Address', and the 'Field Name' is also 'Address'. There are fields for 'Description' and 'Help Text'. Under 'Required', there is a checked checkbox. Under 'Auto add to custom report type', there is another checked checkbox. The 'Default Value' section includes a 'Show Formula Editor' button and a note about formula syntax. At the bottom right, there are 'Previous', 'Next', and 'Cancel' buttons.

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

The screenshot shows the configuration for a new Picklist field named 'consumer status'. The 'Field Label' is 'consumer status' and the 'Field Name' is 'consumer_status'. In the 'Values' section, the 'Enter values, with each value separated by a new line' option is selected, and the values 'student', 'employee', and 'others' are listed in the text area. There are checkboxes for 'Display values alphabetically, not in the order entered', 'Use first value as default value', and 'Restrict picklist to the values defined in the value set'. The 'Description' and 'Help Text' fields are empty. At the bottom, there are 'Required' checkboxes and 'Auto add to custom report type' checkboxes. The sidebar on the left is identical to the previous screenshot.

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 hp i3,i4,i5 and also for mac bionic chip include the values for it.

Laptop Bookings

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Controlling Field: Laptop names
Dependent Field: core type

Instructions:

- Double click on a cell to toggle its visibility for the Controlling Field value shown in the column heading.
- To change multiple cells at once, select multiple cells and then click the Include Values or Exclude Values button to change the visibility of all selected cells at once.
- Use SHIFT + click to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent.
- Use the Preview button to test the results.

Legend:
Excluded Value
Included Value

Click button to include or exclude selected values from the dependent picklist:
Include Values | Exclude Values

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

Showing Columns: 1 - 4 (of 4) < Previous | Next > | View All | Go to

Click button to include or exclude selected values from the dependent picklist:
Include Values | Exclude Values

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

Showing Columns: 1 - 4 (of 4) < Previous | Next > | View All | Go to

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 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

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

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

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

SETUP > OBJECT MANAGER
Laptop Bookings

Laptop Bookings New Relationship Step 2 of 6

Step 2. Choose the related object Previous Next Cancel

Select the other object to which this object is related.

Related To Total laptops

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

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.

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

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

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

Step 1. Choose the field type

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

Data Type

- None Selected Select one of the data types below.
- Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
- Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
- Roll Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
- Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
 - The relationship field is required on all detail records.
 - The ownership and sharing of a detail record are determined by the master record.
 - When a user deletes the master record, all detail records are deleted.
 - You can create rollup summary fields on the master record to summarize the detail records.
- Master-Detail Relationship Creates a special type of parent-child relationship between this object (the child, or “detail”) and another object (the parent, or “master”) where:
 - The relationship field is required on all detail records.
 - The ownership and sharing of a detail record are determined by the master record.
 - When a user deletes the master record, all detail records are deleted.
 - You can create rollup summary fields on the master record to summarize the detail records.

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

Step 2 of 5

Field Label: Laptops delivered

Field Name: laptops_delivered

Description: (empty)

Help Text: (empty)

Select Roll-up Type: COUNT

Click on Next

Select the Laptop Bookings in the Summarized Object

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

Step 3 of 5

Select Object to Summarize:

- Master Object: Total laptops
- Summarized Object: Laptop Bookings

Select Roll-up Type:

- COUNT
- SUM
- MIN
- MAX

Filter Criteria:

- All records should be included in the calculation
- Only records meeting certain criteria should be included in the calculation

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

The screenshot shows the Salesforce Object Manager interface for creating a new field. The left sidebar lists various object types: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules. The main area is titled 'Insert Field' and contains the formula 'Laptop available (Number) = 50 - Total_no_of_laptops__r.Laptops_delivered__c'. To the right, a 'Functions' sidebar lists several mathematical and date-related functions: ABS, ACOS, ADDMONTHS, AND, ASOF, ASIN, with an 'Insert Selected Function' button at the bottom.

Click on Next >> Next >> Save and new

To create fields in an object:

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

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.

The screenshot shows the creation of a new picklist field. The left sidebar is identical to the previous one. The main area shows the 'Values' section with the radio button 'Enter values, with each value separated by a new line' selected. Below this, a text area contains the values '1', '2', '3', '4', and '5'. There are three checkboxes below the values: 'Display values alphabetically, not in the order entered', 'Use first value as default value', and 'Restrict picklist to the values defined in the value set'. The 'Field Name' is set to 'how_many_months', 'Description' is empty, and 'Help Text' is empty. At the bottom, there are two checked checkboxes: 'Always require a value in this field in order to save a record' and 'Add this field to existing custom report types that contain this entity'.

Creation of Fields & Relationships for Billing Process Object

1. To create fields & relationships to an object:

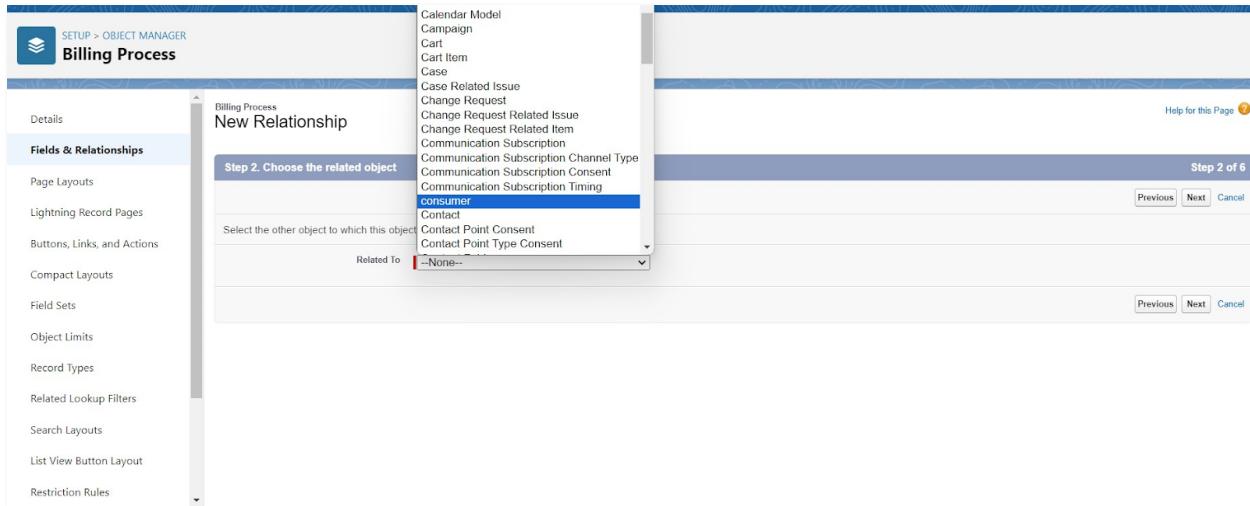
Go to setup >> click on Object Manager >> type object name(Billing Process) in the search bar >> click on the object.

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:

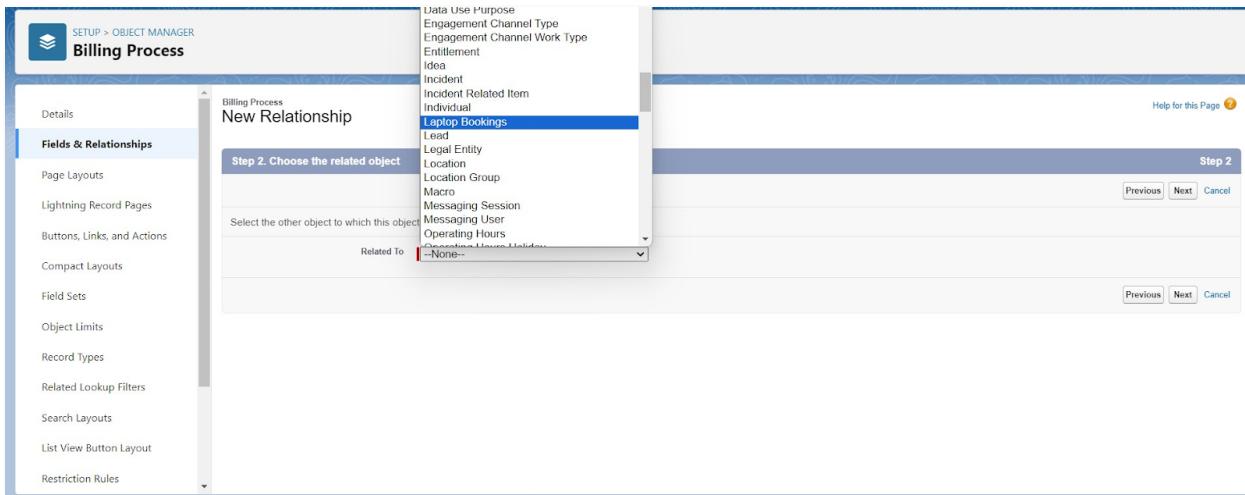
Go to setup >> click on Object Manager >> type object name(Billing Process) in the search bar >> click on the object.

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”

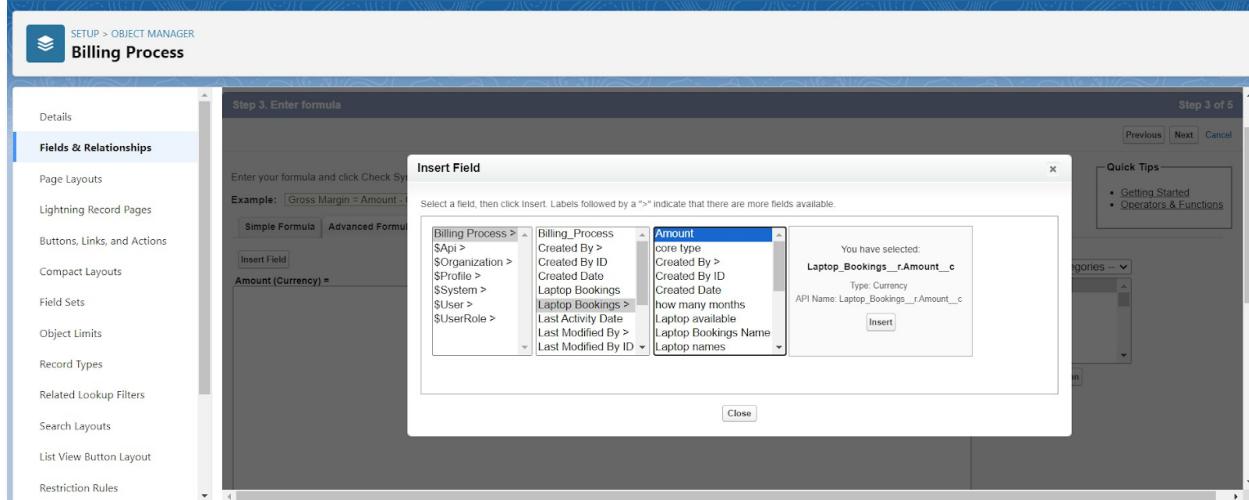
Click on Next

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

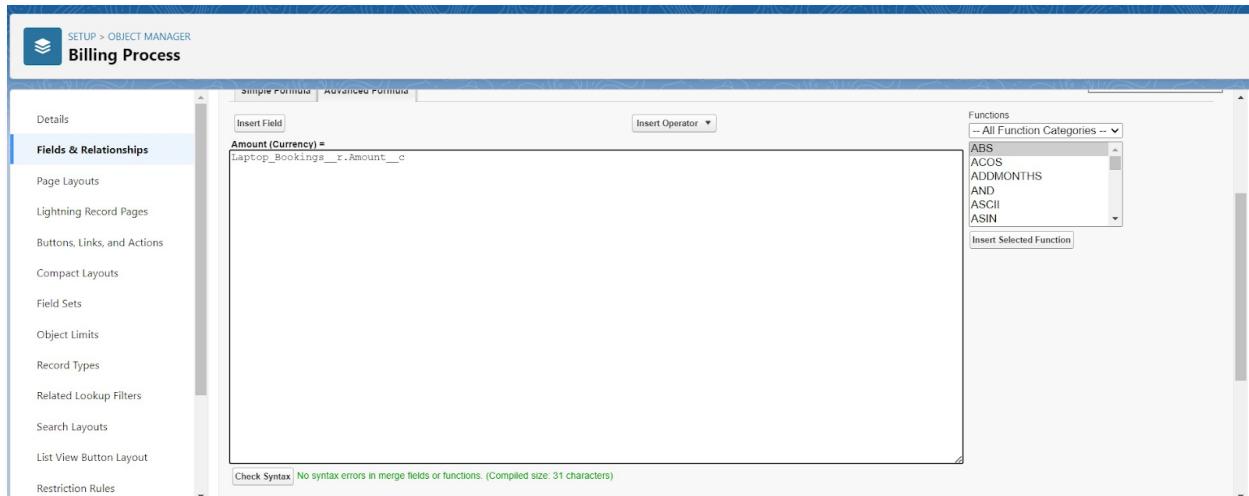
In the Advanced Formula, Click on the Insert field in the popup Screen Select the Billing

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”

The screenshot shows the 'Object Manager' section of the Salesforce setup. A new field is being created for the 'Total laptops' object. The field name is 'Laptops Available'. The 'Formula Return Type' is selected as 'Number'. The formula entered is '50 - Laptops_delivered__c'. The 'Decimal Places' dropdown is set to 0. The 'Check Syntax' button at the bottom left is visible.

Select the Decimal places as “0” and Click on Next

Click on the Advanced

Formula “ 50 - Laptops_delivered__c ” and Check Syntax

The screenshot shows the 'Advanced Formula' tab for the same field creation process. The formula '50 - Laptops_delivered__c' is entered in the main formula editor. A sidebar on the right lists various mathematical and logical functions like ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN, etc., with 'ABS' currently selected. The 'Check Syntax' button at the bottom left is visible.

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

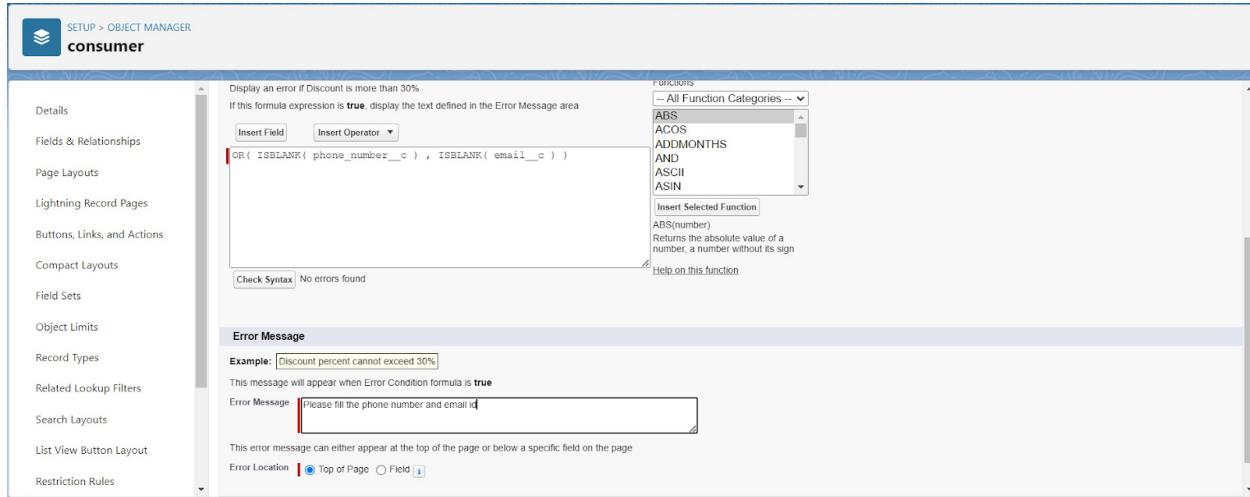
Go to the setup page >> click on the object manager >> From the drop down, click edit for consumer object.

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.

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 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.

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

Your Organization's Role Hierarchy

Collapse All Expand All

- smartbridge
 - CEO** Edit | Del | Assign
 - Add Role**
 - CFO** Edit | Del | Assign
 - Add Role**
 - COO** Edit | Del | Assign
 - Add Role**
 - HR** Edit | Del | Assign
 - Add Role**
 - owner** Edit | Del | Assign
 - Add Role**
 - SVP.Customer Service & Support** Edit | Del | Assign
 - Add Role**
 - SVP.Human Resources** Edit | Del | Assign
 - Add Role**
 - SVP.Sales & Marketing** Edit | Del | Assign
 - Add Role**

Show in tree view ▾

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.

The screenshot shows the 'User Edit' page in Salesforce. At the top, there's a 'General Information' section with fields for First Name ('vicky'), Last Name ('rushi'), Alias ('vrush'), Email ('udayrushi00@gmail.com'), Username ('udayrushi00@456789gmail'), Nickname ('vicky'), Title, Company, Department, and Division. To the right of these, under 'Role', 'owner' is selected. Under 'User License', 'Salesforce' is chosen. Under 'Profile', 'Standard User' is selected. A series of checkboxes for 'Active' status are checked: Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, and WDC User. Below these, 'Data.com User Type' is set to '--None--'. At the bottom of the form, there are buttons for 'Save', 'Save & New', and 'Cancel'.

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.

The screenshot shows the 'New User' setup page in Salesforce. The 'General Information' section contains fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. The 'Advanced' section includes fields for Role (set to Agent), User License (set to Salesforce Platform), Profile (set to Standard Platform User), Active (checked), and various other user types like Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, and WDC User. There are also dropdowns for Data.com User Type and Data.com Monthly Addition Limit, and an Accessibility Mode setting.

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.

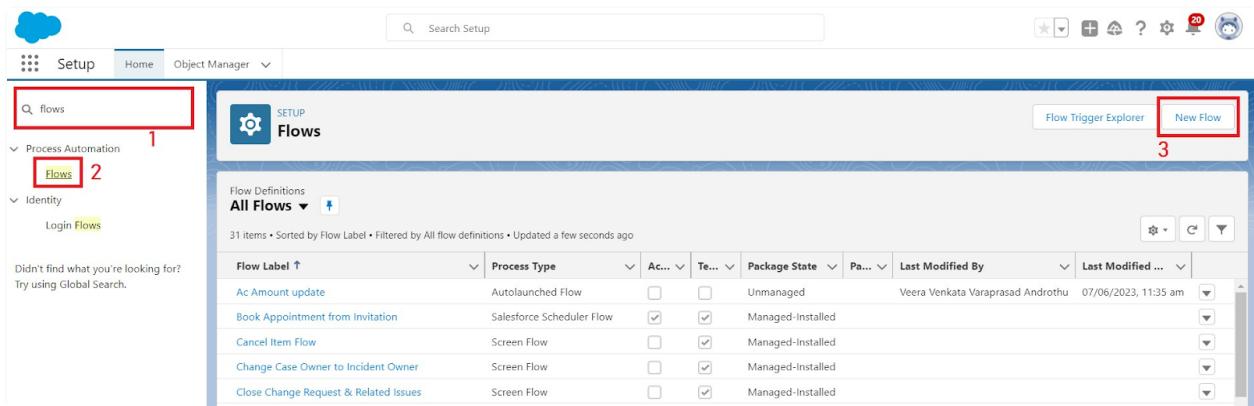
Flow Elements: Flow Builder offers various elements that you can use to create flows, such as variables, decisions, loops, and more. These elements allow you to build sophisticated logic into your flows.

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.

The screenshot shows the "Configure Start" configuration dialog with the following sections:

- 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.

At the bottom right are "Cancel" and "Done" buttons.

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

*Optimize the Flow for:

Fast Field Updates

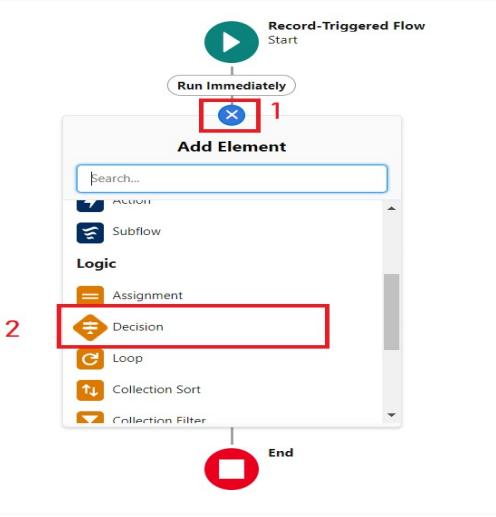
Update fields on the record that triggers the flow to run. This high-performance flow runs *before* the record is saved to the database.

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

- 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.

Edit Decision

* Label field should updated	* API Name 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 ① +	OUTCOME DETAILS *Label dell *Outcome API Name dell Condition Requirements to Execute Outcome All Conditions Are Met (AND) Resource \$Record > Laptop names Operator Equals Value Dell
Delete Outcome Cancel 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 *Label dell core i3 *Outcome API Name dellcore_i3 Condition Requirements to Execute Outcome All Conditions Are Met (AND) Resource \$Record > core type Operator Equals Value core i3
Delete Outcome Cancel 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.

Edit Decision

*Label	months selected	*API Name	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	
1	*Label	1	*Outcome API Name
2	Condition Requirements to Execute Outcome	X1	
3	All Conditions Are Met (AND)		
4	Resource	Operator	Value
5	\$Record > how many months X	Equals	1

[Delete Outcome](#)

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

- 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.

Edit Decision

*Label	months selected	*API Name	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	
1	*Label	1	*Outcome API Name
2	Condition Requirements to Execute Outcome	X1	
3	All Conditions Are Met (AND)		
4	Resource	Operator	Value
5	\$Record > how many months X	Equals	1

[Delete Outcome](#)

[Cancel](#) [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.

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	
1 acer core i3	*Label acer core i3	*Outcome API Name acer_core_i3
2 acer core i5		
3 acer core i7		
Condition Requirements to Execute Outcome All Conditions Are Met (AND)		
Default Outcome 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		

- 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.

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 (1) [+] acer 1(i3) acer 2(i3) acer 3(i3) acer 4(i3) acer 5(i3)	OUTCOME DETAILS * Label acer 1(i3) * Outcome API Name acer_1_i3 Condition Requirements to Execute Outcome All Conditions Are Met (AND) Resource \$Record > how many months Operator Equals Value 1	Delete Outcome

Cancel Done

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

Edit Update Records

one month of acer i3 rate (one_month_of_acer_i3_rate) [edit]

*** 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

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.

Edit Decision

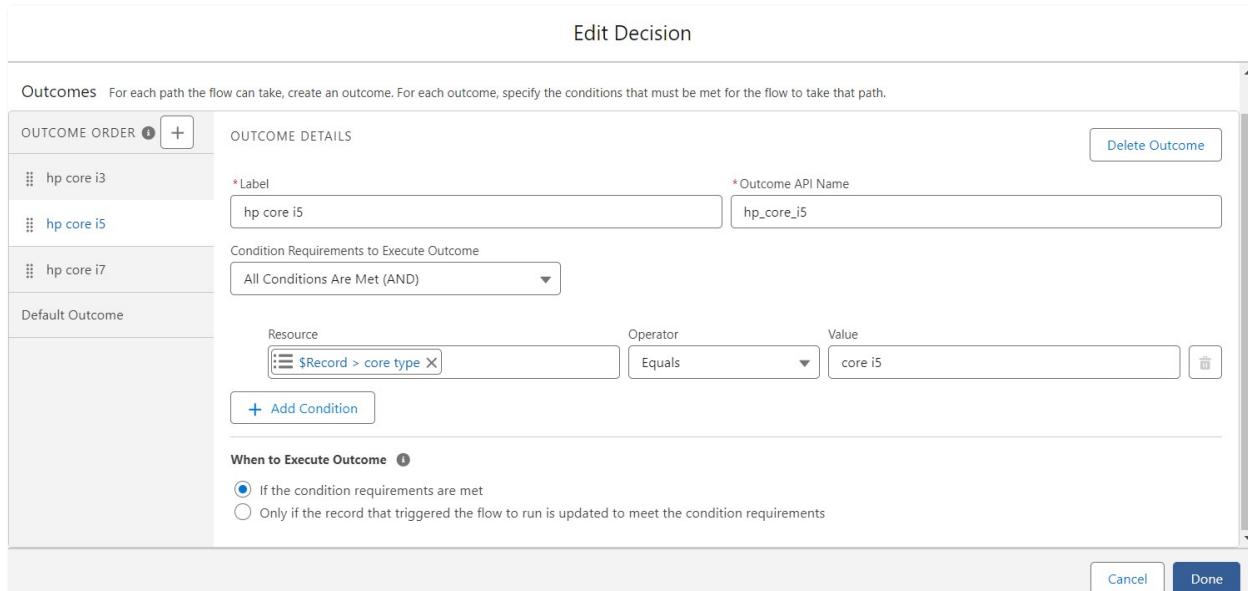
Outcomes For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

OUTCOME ORDER	OUTCOME DETAILS	Actions
hp core i3	*Label: hp core i5 *Outcome API Name: hp_core_i5 Condition Requirements to Execute Outcome: All Conditions Are Met (AND)	Delete Outcome
hp core i5		
hp core i7		
Default Outcome	Resource: \$Record > core type X Operator: Equals Value: core i5 + 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



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.

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

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.

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	
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	Operator	Value
\$Record > how many months	Equals	1

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

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

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

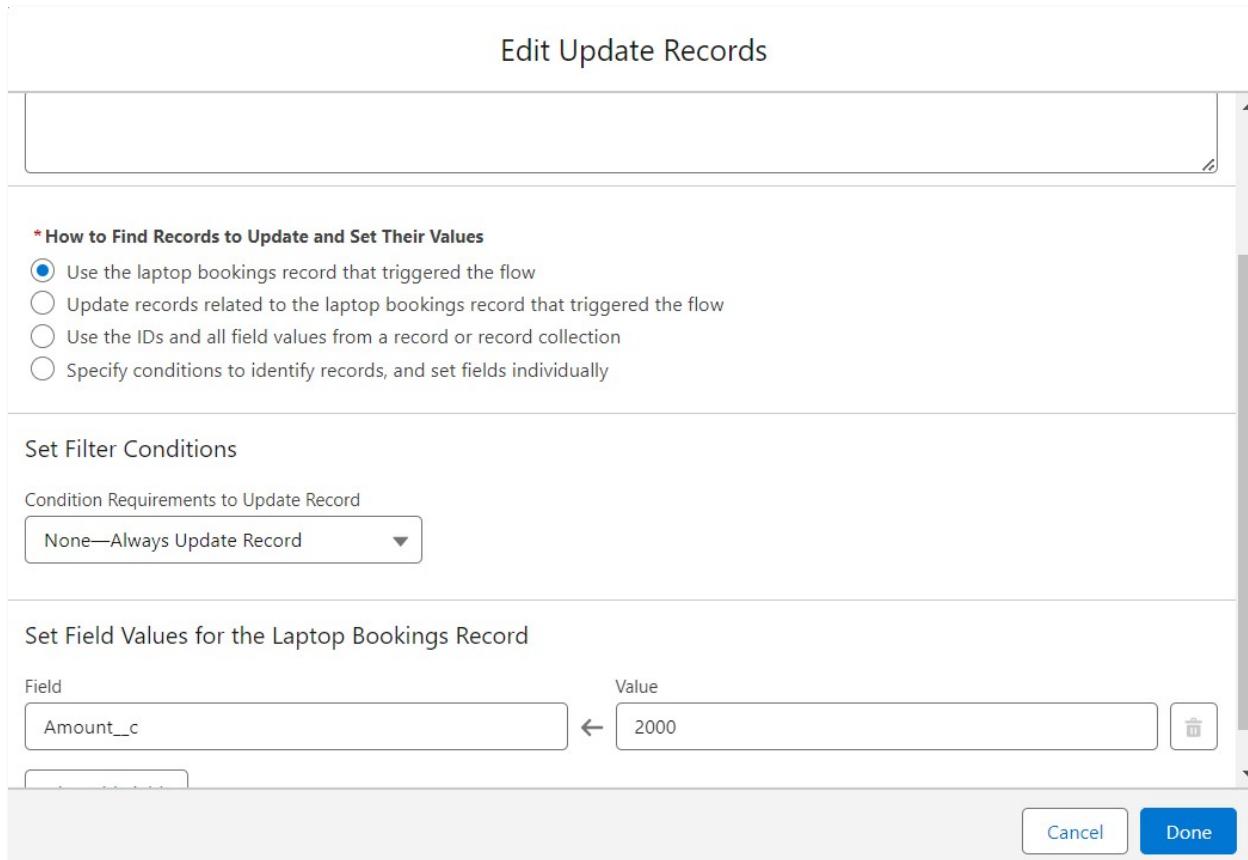
Condition Requirements to Update Record

None—Always Update Record ▾

Set Field Values for the Laptop Bookings Record

Field	Value	Remove
Amount__c	2000	✖

Cancel Done



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.

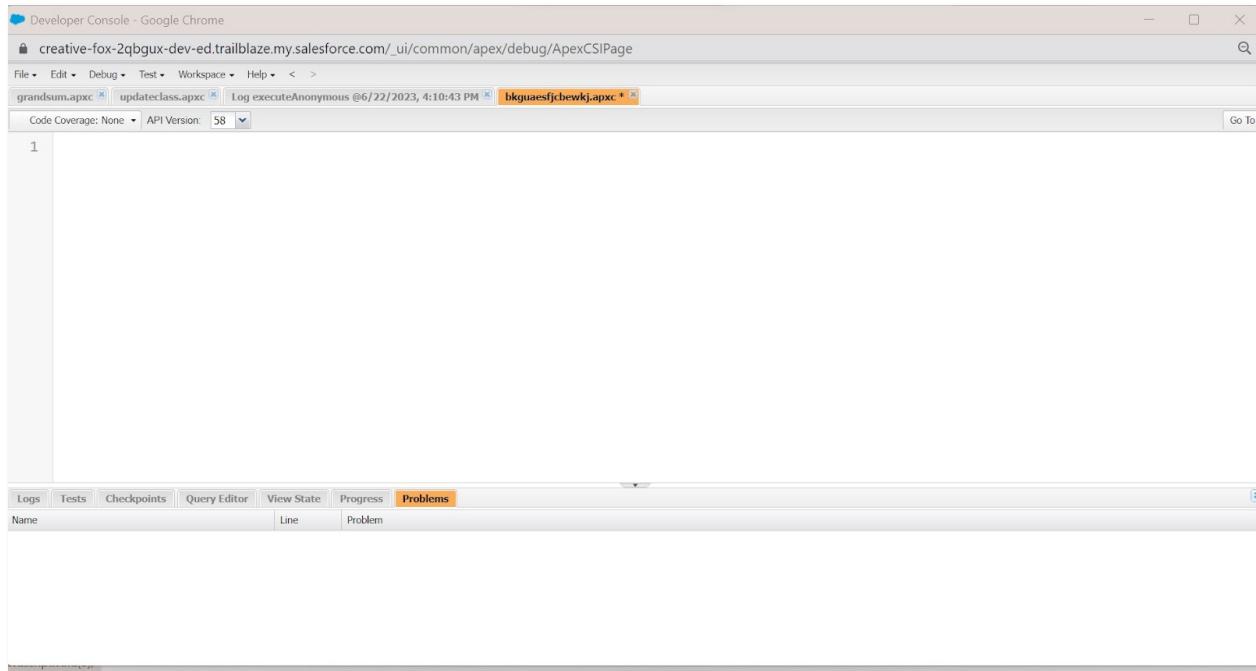
Object

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:

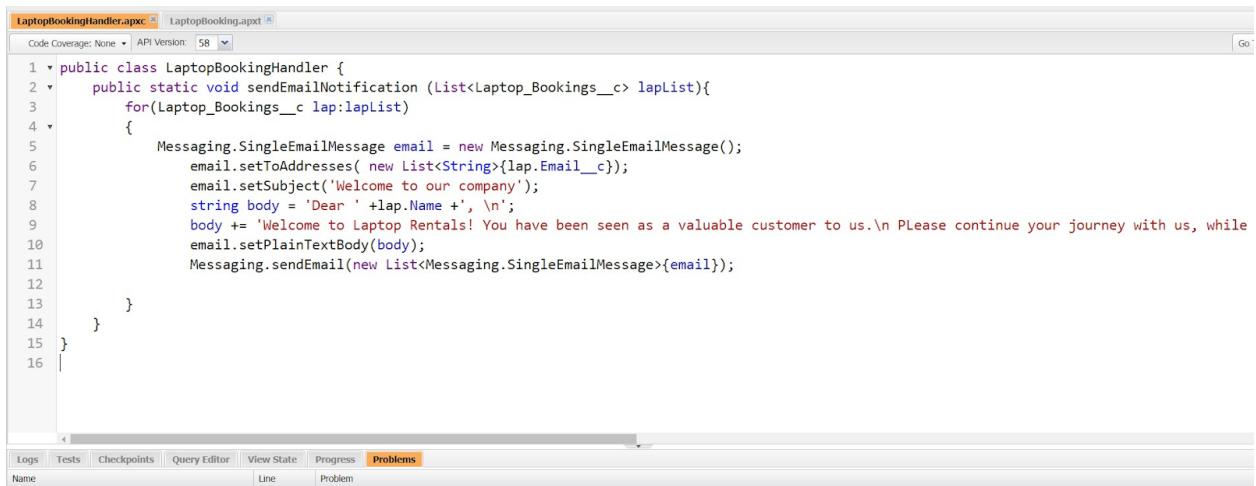
Login to the trailhead account and navigate to the gear account in the top right corner.

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.

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 tab bar shows 'LaptopBookingHandler.apxc' and 'LaptopBooking.apxt'. The code editor displays the following Apex trigger:

```
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 }
```

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

Total Records 5 Total Amount ₹90,000

<input type="checkbox"/> types of version ↑	consumer: consumer_name	Laptop Bookings: Laptop Bookings	Total No Of Laptops: Total Laptops	Laptop names	Amount	core type
<input type="checkbox"/> Intermediate (1)	Manoj	1	1	Acer	₹1,500	Core i5
Subtotal					₹1,500	
<input type="checkbox"/> 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	
<input type="checkbox"/> 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