

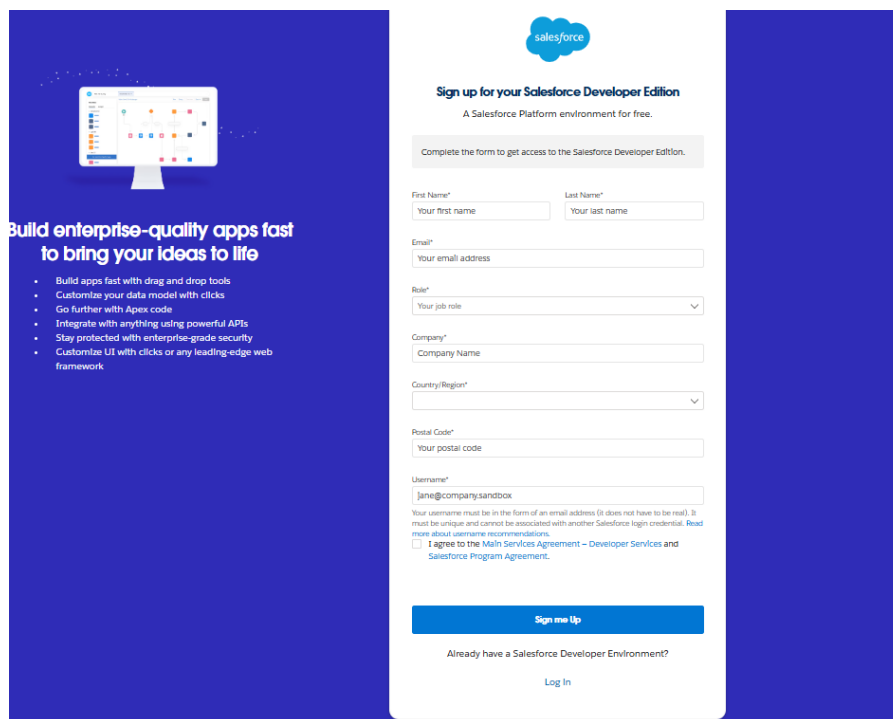
A CRM APPLICATION FOR LAPTOP RENTALS

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

Salesforce:

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers. Salesforce has everything you need to run your business from anywhere.

Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.



The image shows the Salesforce Developer Edition sign-up page. On the left, there is a blue sidebar with a white box containing a laptop icon and the text "Build enterprise-quality apps fast to bring your ideas to life". Below this, there is a list of bullet points: "Build apps fast with drag and drop tools", "Customize your data model with clicks", "Go further with Apex code", "Integrate with anything using powerful APIs", "Stay protected with enterprise-grade security", and "Customize UI with clicks or any leading-edge web framework". The main content area is white and features the Salesforce logo at the top. Below the logo, the text reads "Sign up for your Salesforce Developer Edition" and "A Salesforce Platform environment for free." There is a grey box with the text "Complete the form to get access to the Salesforce Developer Edition." followed by a series of form fields: "First Name*" (with placeholder "Your first name"), "Last Name*" (with placeholder "Your last name"), "Email*" (with placeholder "Your email address"), "Role*" (a dropdown menu with "Your job role" selected), "Company*" (with placeholder "Company Name"), "Country/Region*" (a dropdown menu), "Postal Code*" (with placeholder "Your postal code"), and "Username*" (with placeholder "jane@company.sandbox"). Below the username field, there is a note: "Your username must be in the form of an email address (it does not have to be real). It must be unique and cannot be associated with another Salesforce login credential. Read more about username recommendations." There is a checkbox labeled "I agree to the Main Services Agreement – Developer Services and Salesforce Program Agreement." and a blue "Sign me Up" button. At the bottom, there is a link "Log In" and a text "Already have a Salesforce Developer Environment?".

Build enterprise-quality apps fast to bring your ideas to life

- Build apps fast with drag and drop tools
- Customize your data model with clicks
- Go further with Apex code
- Integrate with anything using powerful APIs
- Stay protected with enterprise-grade security
- Customize UI with clicks or any leading-edge web framework

Sign up for your Salesforce Developer Edition
A Salesforce Platform environment for free.

Complete the form to get access to the Salesforce Developer Edition.

First Name*
Your first name

Last Name*
Your last name

Email*
Your email address

Role*
Your job role

Company*
Company Name

Country/Region*
Country/Region

Postal Code*
Your postal code

Username*
jane@company.sandbox

Your username must be in the form of an email address (it does not have to be real). It must be unique and cannot be associated with another Salesforce login credential. [Read more about username recommendations.](#)

☐ I agree to the Main Services Agreement – Developer Services and Salesforce Program Agreement.

Sign me Up

Already have a Salesforce Developer Environment?
[Log In](#)

Object Creation:

What Is an Object?

Salesforce objects are database tables that permit you to store data that is specific to an organization. What are the types of Salesforce objects?

Salesforce objects are of two types:

Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.

Custom Objects: Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

Create Total Laptops Object

- From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
- Enter the label name>> Total Laptops
- Plural label name>> Total Laptops
- Enter RecordName Label and Format Record Name >>Total Laptops
- Data Type >>Text
- Click on Allow reports,Allow search and TrackField History,
- Allow search >> Save.

Search Setup

Setup Home Object Manager

SETUP

New Custom Object

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more](#) [Don't show this message again](#)

Custom Object Definition Edit Save Save & New Cancel

Custom Object Information Required Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label Example: Account

Plural Label Example: Accounts

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

Object Name Example: Account

Description

Context Sensitive Help Setting

☒ Open the standard Salesforce.com Help & Training window

☐ Open a window using a Visualforce page

Content Name

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name Example: Account Name

Data Type Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.

Optional Features

☒ Allow Reports

☐ Allow Activities

☒ Track Field History

Create consumer Object

- From the setup page , Click on Object Manager
- Click on Create
- Click on Custom Object.
- Enter the label name >> consumer
- Plural label name >> consumer
- Enter Record Name Label and Format
- Record Name >> consumer_name
- Data Type >> Name
- Click on Allow reports,Allow search and TrackField History,
- Allow search >> Save.

SETUP > OBJECT MANAGER
consumer

Details
Fields & Relationships
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Details

Edit Delete

Description

API Name
consumer__c

Custom

Singular Label
consumer

Plural Label
consumer

Enable Reports
✓

Track Activities

Track Field History
✓

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Create Laptop Bookings Object

- From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
- Enter the label name >> Laptop Bookings
- Plural label name >> LaptopBookings
- Enter RecordName Label and Format
- Record Name >> LaptopBookings Data Type >> Name
- Click on Allow reports, Allow search and TrackField History,
- Allow search >> Save.

SETUP > OBJECT MANAGER
Laptop Bookings

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Details

Edit Delete

Description

API Name
Laptop_Bookings__c

Custom

Singular Label
Laptop Bookings

Plural Label
Laptop Bookings

Enable Reports
✓

Track Activities

Track Field History
✓

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Create Billing Process Object

- From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
- Enter the label name >> Billing Process
- Plural label name >> BillingProcess
- Enter RecordName Label and Format
Record Name >> Billing Process

Data Type >> Name

- Click on Allow reports, Allow search and Track FieldHistory,
- Allow search >> Save.

Tabs

What is a tab : A tab is like a user interface that is used to build records for objects and to view the records in the objects.

Types of Tabs:

- **Custom Tabs:** Custom object tabs are the user interface for custom applications that you build in salesforce.com. They look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.
- **Web Tabs:** Web Tabs are custom tabs that display web content or applications embedded in the salesforce.com window. Web tabs make it easier for your users to access content and applications they frequently use without leaving the salesforce.com application.
- **Visual force Tabs:** Visual force Tabs are custom tabs that display a Visual force page. Visual force tabs look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.
- **Lightning Component Tabs:** Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app.
- **Lightning Page Tabs:** Lightning Page Tabs let you add LightningPages to the



mobile app navigation menu. Lightning Page tabs do not work like other custom tabs. Once created, they don't show up on the All Tabs page when you click the Plus icon that appears to the right of your current tabs. Lightning Page tabs also don't show up in the Available Tabs list when you customize the tabs for your apps.

Creating a Custom Tab

To create a Tab:

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

navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mo

Custom Object Tabs			New	What Is This?
Action	Label	Tab Style		
Edit Del	Billing Process	 Stack of Cash		
Edit Del	consumer	 People		
Edit Del	Laptop Bookings	 Form		
Edit Del	Total Laptops	 Laptop		

Web Tabs			New	What Is This?
----------	--	--	-----	---------------

The Lightning App

An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

Lightning apps let you brand your apps with a custom color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your organization can work more efficiently by easily switching between apps.

Create a Lightning App

To create a lightning app page:

- Go to the setup page >> search “app manager” in quick find >> select “app manager” >> click on New lightning App.
- Fill the app name in app details as LAPTOP RENTALS >>Next >> (App option page) keep it as default >> Next >> (Utility Items) keep it as default >> Next.
- Upload a image that is related to your app.

New Lightning App

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

*App Name ⓘ

LAPTOP RENTALS

*Developer Name ⓘ

LAPTOP_RENTALS

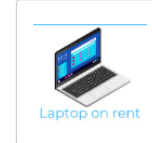
Complete this field.

Description ⓘ

Enter a description...

App Branding

Image ⓘ



Clear

Primary Color Hex

Value ⓘ

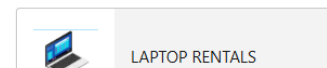


#0070D2

Org Theme Options

☐ Use the app's image and color instead of the org's custom theme

App Launcher Preview



- To Add Navigation Items: Select the items (Total Laptops, consumer, Laptop Booking, Billing Process) from the search bar and move it using the arrow button Next.
- To Add User Profiles: Search profiles (System administrator) in the search bar >> click on the arrow button >> save & finish.

Fields

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

Types of Fields

- Standard Fields
- Custom Fields

Standard Fields:

As the name suggests, the Standard Fields are the predefined fields in Salesforce that perform a standard task. The main point is that you can't simply delete a Standard Field until it is a non-required standard field. Otherwise, users have the option to delete them at any point from the application freely. Moreover, we have some fields that you will find common in every Salesforce application. They are,

>>Created By

>>Owner

>> Last Modified

>> Field Made During object Creation

Custom Fields:

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

Creating the field in consumer object

To create fields in an object:

- Goto setup >> click on ObjectManager >> type object name(consumer) in search bar >> click on the object.
- Now click on "Fields & Relationships" >> New
- Select Data Type as a "Phone"
- Click on next

To create another field in an object:

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

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

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 values are:-1.core i3 2. Core i5 3. Core i7 .
- Select required
- Click on Next >>Next >> Save and new
- Go to setup >> click on Object Manager >> type object name(Laptop Booking) in the search bar >> click on the object.
- click field dependency and next
- 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.

SETUP > OBJECT MANAGER
Laptop Bookings

Details

Fields & Relationships
11 Items, Sorted by Field Label

Q, Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Currency(18, 0)		▼
core type	core_type__c	Picklist	Laptop names	▼
Created By	CreatedById	Lookup(User)		▼
Email	Email__c	Email		▼
how many months	how_many_months__c	Picklist		▼
Laptop Bookings Name	Name	Text(80)		✓
Laptop names	Laptop_names__c	Picklist		▼
Laptops Available	Laptops_Available__c	Formula (Number)		▼
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)		✓

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Flow Triggers
Validation Rules
Conditional Field

To Create a Fields & Relationship for 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 “Master-detail Relationship”
- Click on Next
- Click on the Related to drop down and Select the consumer object and click on Next
- Change the FieldLabel: Name
- click on Next >>Next >> Save and new.

SETUP > OBJECT MANAGER
Billing Process

Details

Fields & Relationships

7 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount_c	Formula (Number)		
Billing Processname	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Laptop Booking	Laptop_Booking_c	Lookup(Laptop Bookings)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name_c	Master-Detail(consumer)		✓
Payment Mode	Payment_Mode_c	Picklist		

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Restriction Rules
Scoping Rules
Object Access
Triggers

Creation of another fields for the billing process object

To create fields in an object:

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

UPI

Phonepe

Gpay

Paytm
- Select required
- Click on Next >> Next >> Save and new.

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 FormulaClick 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

Creating the field in Total Laptops 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 and Save it

SETUP > OBJECT MANAGER

Total Laptops

Details

Fields & Relationships
6 items, Sorted by Field Label

Q, Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
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)		✓ ▼

Field Sets
Object Limits
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Flow Triggers

Validation rule

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

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

Creating the validation rule for phone number field in consumer object

- 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 “Phonenumberoremailblankrule”.
- 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 SystemAdministrator, Developer, SalesRepresentative.

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:

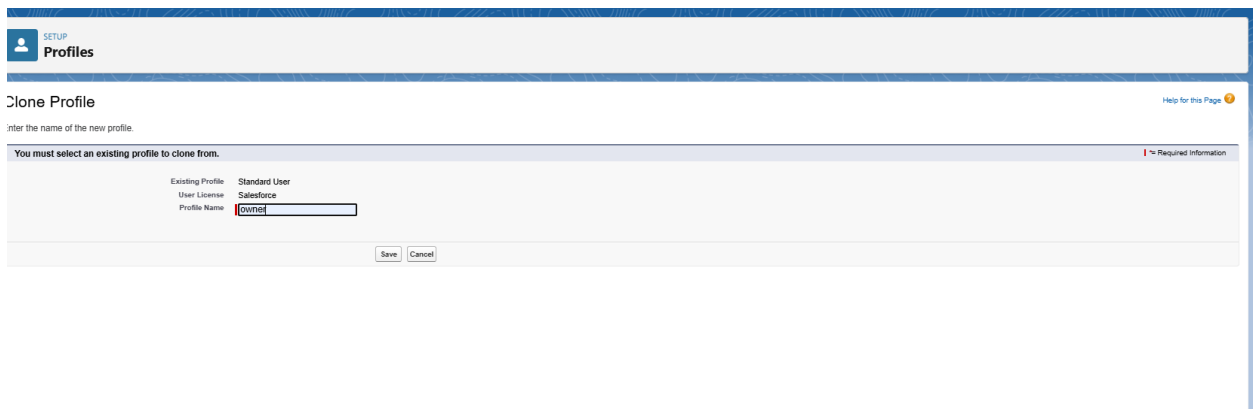
Custom ones defined by us.

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.
- 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.



The screenshot shows the 'Clone Profile' window in Salesforce. At the top, it says 'Clone Profile' and 'Enter the name of the new profile'. Below that, a message states 'You must select an existing profile to clone from.' A table lists the 'Existing Profile' as 'Standard User' with a 'Salesforce' license. The 'Profile Name' field is populated with 'owner'. At the bottom, there are 'Save' and 'Cancel' buttons.

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 BillingProcess objects as mentioned in the below diagram.

The screenshot displays the 'Custom Object Permissions' and 'Session Settings' configuration in Salesforce. The 'Custom Object Permissions' section is divided into two tables. The first table lists standard objects with their respective permissions. The second table lists custom objects with their respective permissions. The 'Session Settings' section at the bottom shows the 'Session Times Out After' set to '2 hours of inactivity' and the 'Session Security Level Required at Login' set to 'None'.

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
AppLogs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Billing Process	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Books	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Book Line Items	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Book Orders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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

	Basic Access	
	Read	Create
AppLogEvents	<input type="checkbox"/>	<input type="checkbox"/>

Session Settings

Session Times Out After: 2 hours of inactivity

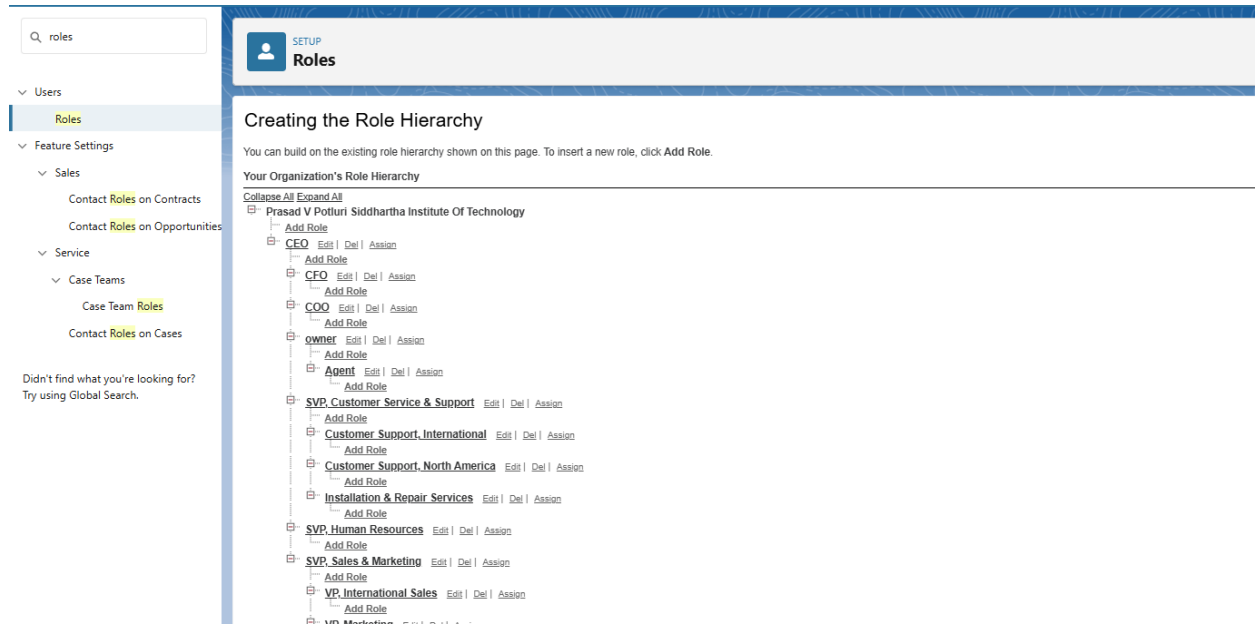
Session Security Level Required at Login: None

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:

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



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.

The screenshot shows the 'User Edit' page in Salesforce Setup. The user being edited is 'vicky y'. The page is divided into two main sections: 'General Information' and 'Permissions'. The 'General Information' section includes fields for First Name (vicky), Last Name (y), Alias (vy), Email (saicharan8773@gmail.com), Username (saicharansalesforce@gmail.com), Nickname (User173199367582555743), Title, Company, Department, and Division. The 'Permissions' section includes a dropdown for Role (owner), a dropdown for User License (Salesforce), and a dropdown for Profile (owner). Below these are checkboxes for various user types: Active, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Data.com User Type, Data.com Monthly Addition Limit, Accessibility Mode (Classic Only), High-Contrast Palette on Charts, Load Lightning Pages While Scrolling, Debug Mode, Make Setup My Default Landing Page, Salesforce CRM Content User, Receive Salesforce CRM Content Email Alerts, Receive Salesforce CRM Content Alerts as Daily Digest, and Allow Forecasting. The 'Required Information' section is also visible on the right side of the page.

Activity 2: creating another users

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.

The screenshot shows the 'User Edit' page in Salesforce. The user's name is 'ram ram'. The 'General Information' section includes fields for First Name (ram), Last Name (ram), Alias (ram), Email (saicharan@salesforce.com), Username (saicharan@salesforce.com), Nickname (User173199375859399371), Title, Company, Department, and Division. The 'Role' is set to 'Agent', 'User License' is 'Salesforce Platform', and 'Profile' is 'Standard Platform User'. The 'Active' checkbox is checked. The 'Marketing User' checkbox is unchecked. The 'Offline User' checkbox is unchecked. The 'Knowledge User' checkbox is unchecked. The 'Flow User' checkbox is unchecked. The 'Service Cloud User' checkbox is unchecked. The 'Site.com Contributor User' checkbox is unchecked. The 'Site.com Publisher User' checkbox is unchecked. The 'WDC User' checkbox is unchecked. The 'Data.com User Type' is set to '-None-'. The 'Data.com Monthly Addition Limit' is set to '300'. The 'Accessibility Mode (Classic Only)' checkbox is unchecked. The 'High-Contrast Palette on Charts' checkbox is unchecked. The 'Load Lightning Pages While Scrolling' checkbox is checked. The 'Debug Mode' checkbox is unchecked. The 'Make Setup My Default Landing Page' checkbox is unchecked. The 'Salesforce CRM Content User' checkbox is checked. The 'Receive Salesforce CRM Content Email Alerts' checkbox is checked. The 'Receive Salesforce CRM Content Alerts as Daily Digest' checkbox is checked.

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. ScreenFlows are often used for data entry and updates.

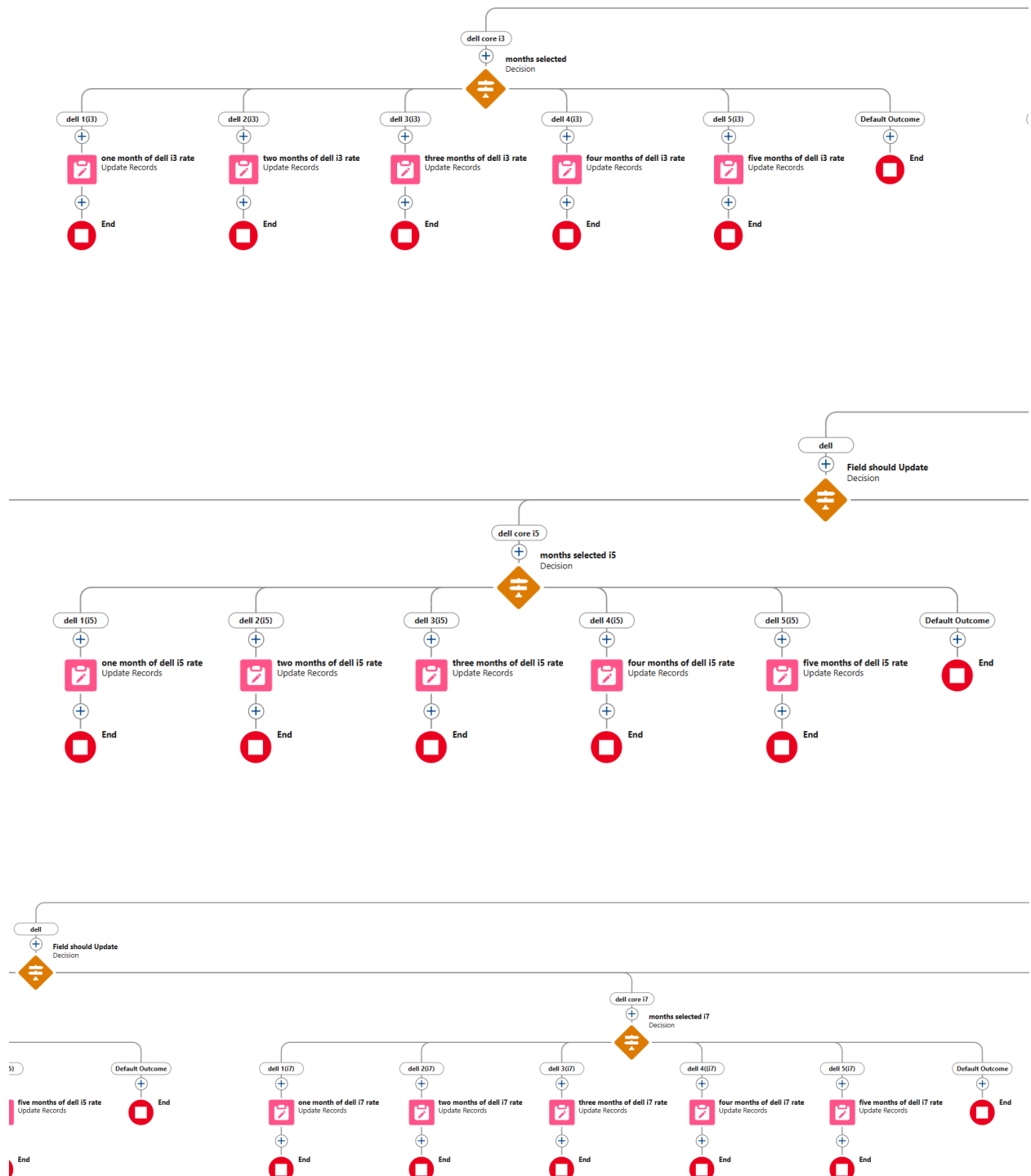
Auto launched Flows: These are flows that are triggered by events, such as when a record is created or updated. They do not require user interaction and can be used for background automation.

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.

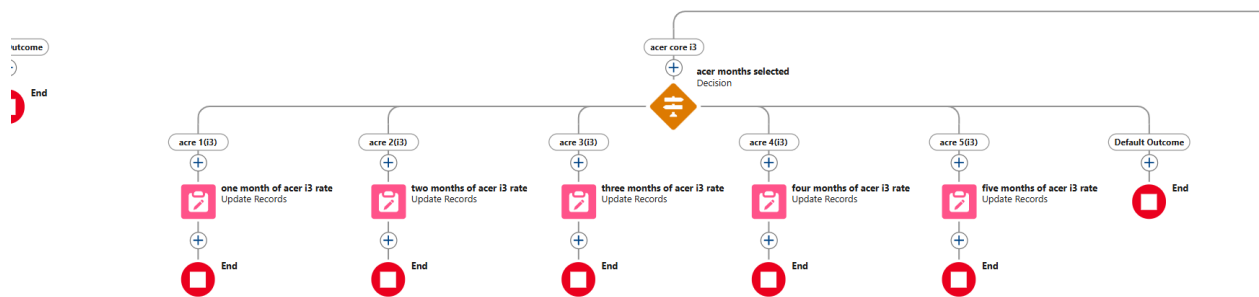
Create a Flow on dell laptop

- Go to Setup and type "Flow" in the Quick Find box.
- Select "Flow" and click "New Flow".
- Choose "Record-Triggered Flow" and click "Create".
- Select "Laptop Booking" from the object dropdown.
- Set the trigger as "A record is Created or Updated".
- Optimize the flow for "Actions and Related Records".
- Click "+" under the flow canvas and select "Decision".
- Set the label to "Update" (API name auto-generates).
- Add outcomes for Dell, Acer, HP, and Mac.
- After the laptop model decision, add another decision for the core type (i3, i5, i7).
- Define conditions for core types (e.g., "core type equals i3").
- Add outcomes for Dell core types (i3, i5, i7).
- After the core type decision, add another decision for months (1-5).
- Set conditions for months (e.g., "how many months equals 1").
- Add outcomes for months selected (1, 2, 3, 4, 5).
- Add an "Update Record" action based on month selection.
- Set Amount c values for Dell i3 (1000, 2000, etc.).
- Repeat the process for Dell i5 and i7 with corresponding amounts.
- Connect outcomes to the appropriate update record actions.
- Save and activate the flow.

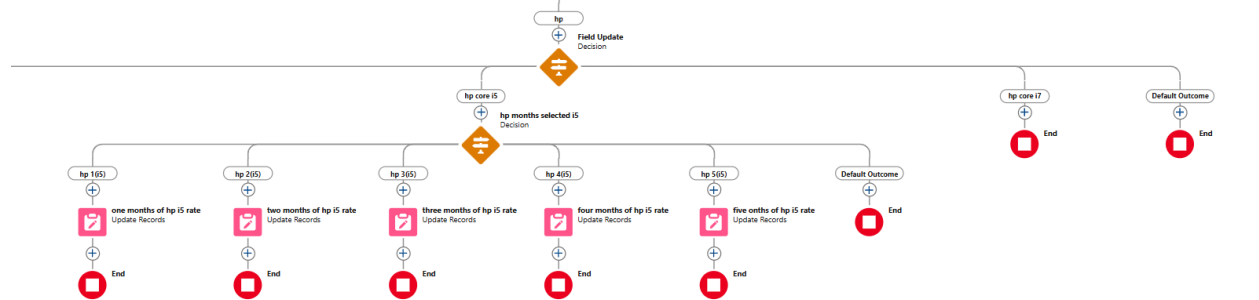
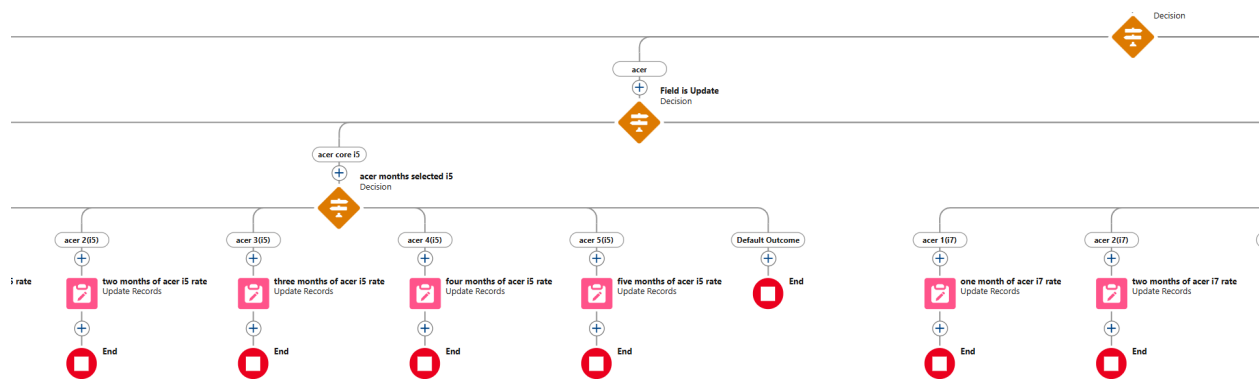


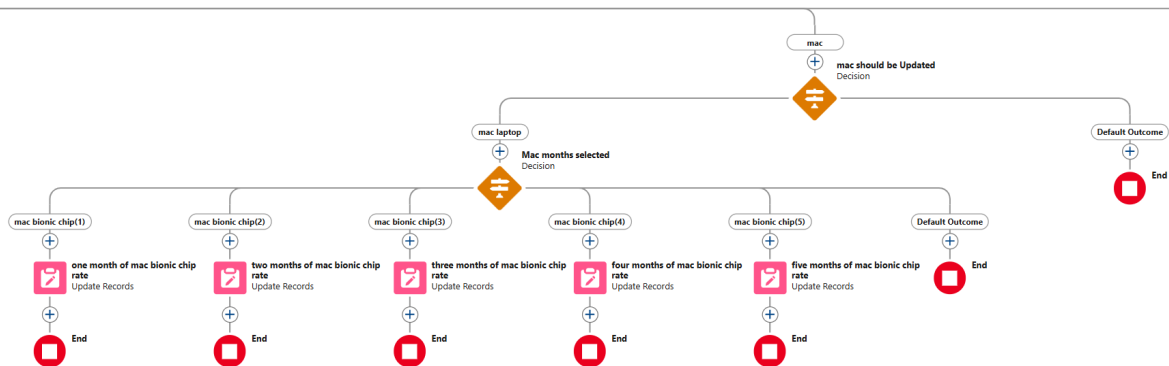
outcome

End



Decision





**Similarly, we did for the remaining laptops also

Creating Classes :

Apex classes are modeled on their counterparts in Java. You will 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 trail head 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.

Trigger code:

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



LaptopBooking - trigger name

Laptop_Bookings c -as per your org(go to laptop bookings object and copy from that object api name).

```
public class LaptopBookingHandler {

    public static void sendEmailNotification (List<Laptop_Bookings c> lapList){
        for(Laptop_Bookingsc lap:lapList)

        {

            Messaging.SingleEmailMessage email = new
            Messaging.SingleEmailMessage(); email.setToAddresses( new
            List<String>{lap.Emails}); email.setSubject('Welcome to our company');

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

            body += 'Welcome to Laptop Rentals! You have been seen as a valuable customer
            to us.\n Please continue your journey with us, while we try to provide you with
            good quality resources. \n Laptop Amount = ' + lap.Amount c + ' \n core type =
            '+ lap.core c + ' \n Laptop type = '+lap.Laptop_type c;

            email.setPlainTextBody(body);

            Messaging.sendEmail(new List<Messaging.SingleEmailMessage>{email});

        }

    }

}
```

The screenshot shows the Salesforce Developer Console in Google Chrome. The browser address bar displays the URL: `prasadvpotluriddhartha156-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage`. The console title is "Developer Console - Google Chrome". The main editor displays the Apex class `LaptopBookingHandler` with the following code:

```
1 public class LaptopBookingHandler {
2
3     public static void sendEmailNotification (List<Laptop_Bookings__c> lapList){
4
5         for(Laptop_Bookings__c lap:lapList)
6
7         {
8
9             Messaging.SingleEmailMessage email = new Messaging.SingleEmailMessage();
10
11             email.setToAddresses( new List<String>{lap.email__c});
12
13             email.setSubject('Welcome to our company');
14
15             string body = 'Dear ' +lap.Name +', \n';
16
17             body += 'Welcome to Laptop Rentals! You have been seen as a valuable customer to us.\n Please continue your journey with us, while we try to provide you with good quality r
18
19             email.setPlainTextBody(body);
20
21             Messaging.sendEmail(new List<Messaging.SingleEmailMessage>{email});
22
23         }
24     }
25 }
26
27
```

The console also shows a "Logs" tab at the bottom with columns: User, Application, Operation, Time, Status, Read, and Size.

Class name:- LaptopBookingHandler

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

core c (as per your org go to laptop booking object and copy from that). 4.Laptop_type c.(as per your org go to laptop booking object and copy from that).

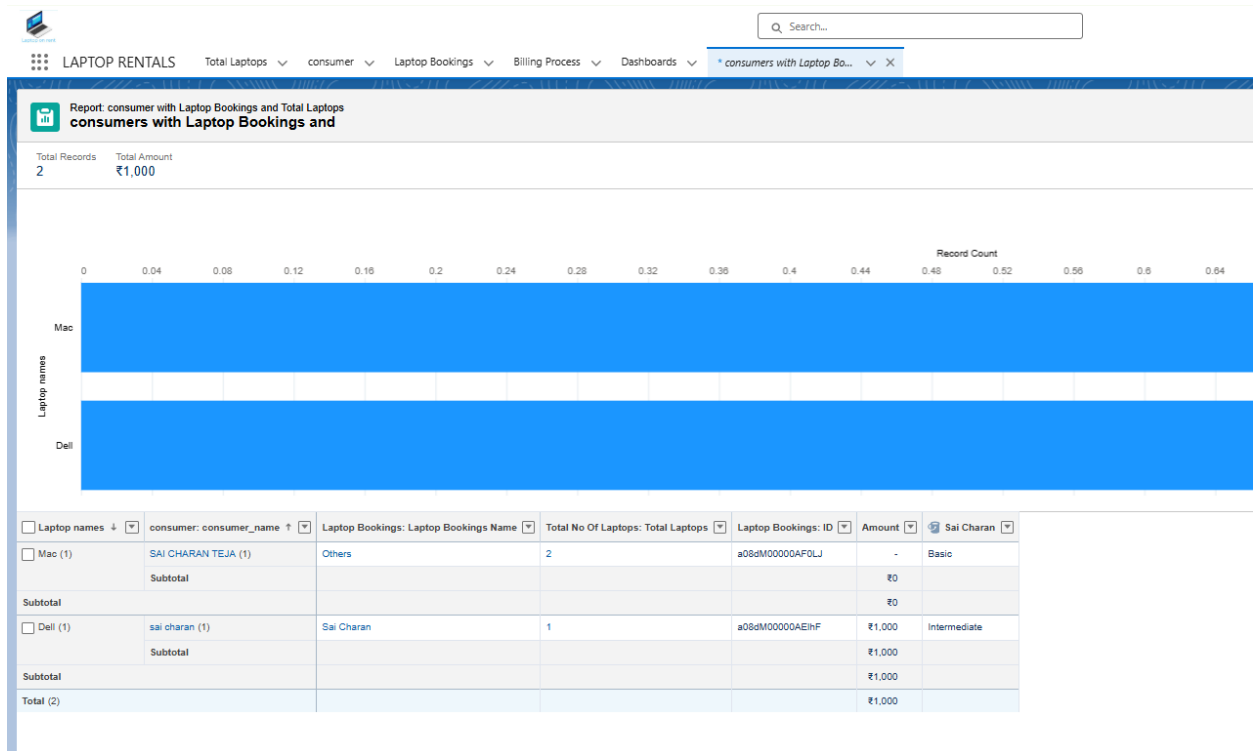
In this project , trigger is called whenever the particular record's sum exceeds the threshold i.e minimum business requirement value. Then the code in the trigger will get executed.

Create Report

- Go to the app -click on the reports tab
- Click New Report.
- Select a report type from the category or from the report type panel or from the search panel "consumer with Laptop Bookings and total laptops">> click on start

report.

- Customize your report
- Add fields from the left pane as shown below
- Click the column drop down and select bucket list.
- Click apply it.



Create Dashboard Folder

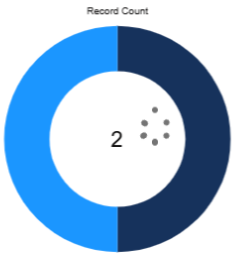
- Click on the app launcher and search for the dashboard.
- Click on the dashboard tab.
- Click the new folder, give the folder label as "total rent amount".
- Folder unique names will be auto populated.
- Click save.



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

Total Records
2

Total Amount
₹1,000



Laptop names +	consumer: consumer_name ↑	Laptop Bookings: Laptop Bookings Name	Total No Of Laptops: Total Laptops	Laptop Bookings: ID	Amount	Sai Charan
Mao (1)	SAI CHARAN TEJA (1)	Others	2	a08dM00000AFOLJ	-	Basic
	Subtotal				₹0	
bttotal					₹0	
Dell (1)	sai charan (1)	Sai Charan	1	a08dM00000AEIhF	₹1,000	Intermediate
	Subtotal				₹1,000	
bttotal					₹1,000	
tal (2)					₹1,000	