

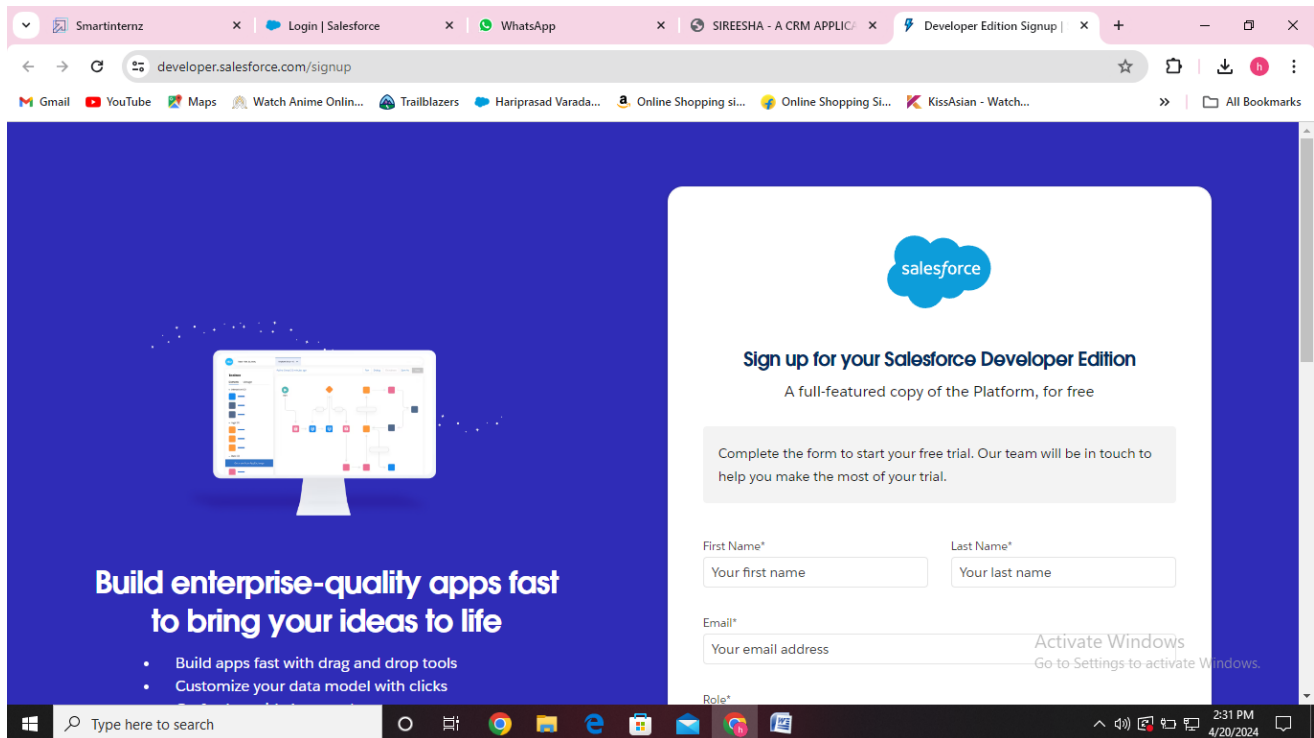
# Project Report on

## A CRM APPLICATION FOR LAPTOP RENTALS

### Milestone – 01: Create Salesforce

Go to <https://developer.salesforce.com/signup>

On the sign up form, enter the following details :



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

Sign up for your Salesforce Developer Edition  
A full-featured copy of the Platform, for free

Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.

First Name\*  
Your first name

Last Name\*  
Your last name

Email\*  
Your email address

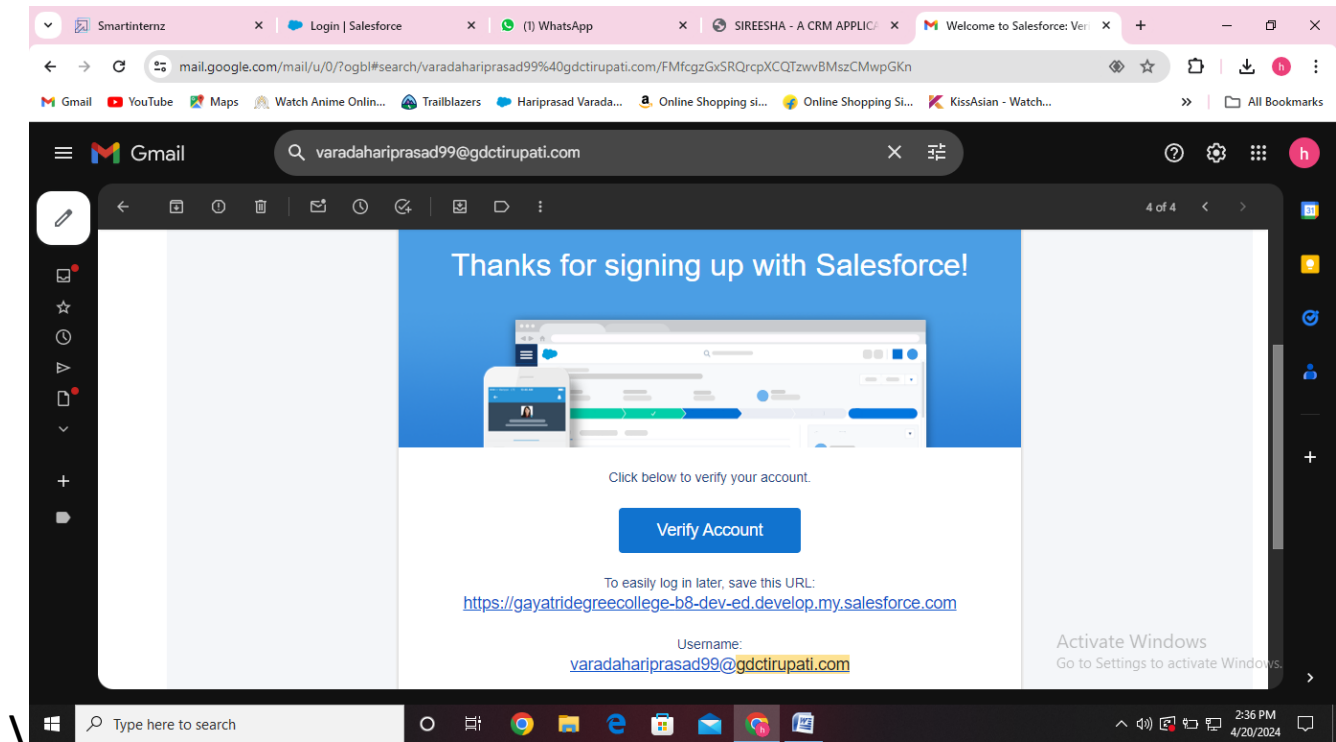
Role\*

Activate Windows  
Go to Settings to activate Windows.

1. First name & Last name – **Varada Hariprasad**
2. Role: **Developer**
3. Email : [varadahariprasad99@gmail.com](mailto:varadahariprasad99@gmail.com)
4. Company: **GAYATRI DEGREE COLLEGE - TIRUPATI**
5. County: **India**
6. Postal Code: **517501**
7. Username: [varadahariprasad99@gdctirupati.com](mailto:varadahariprasad99@gdctirupati.com)

## Account Activation

Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins, as

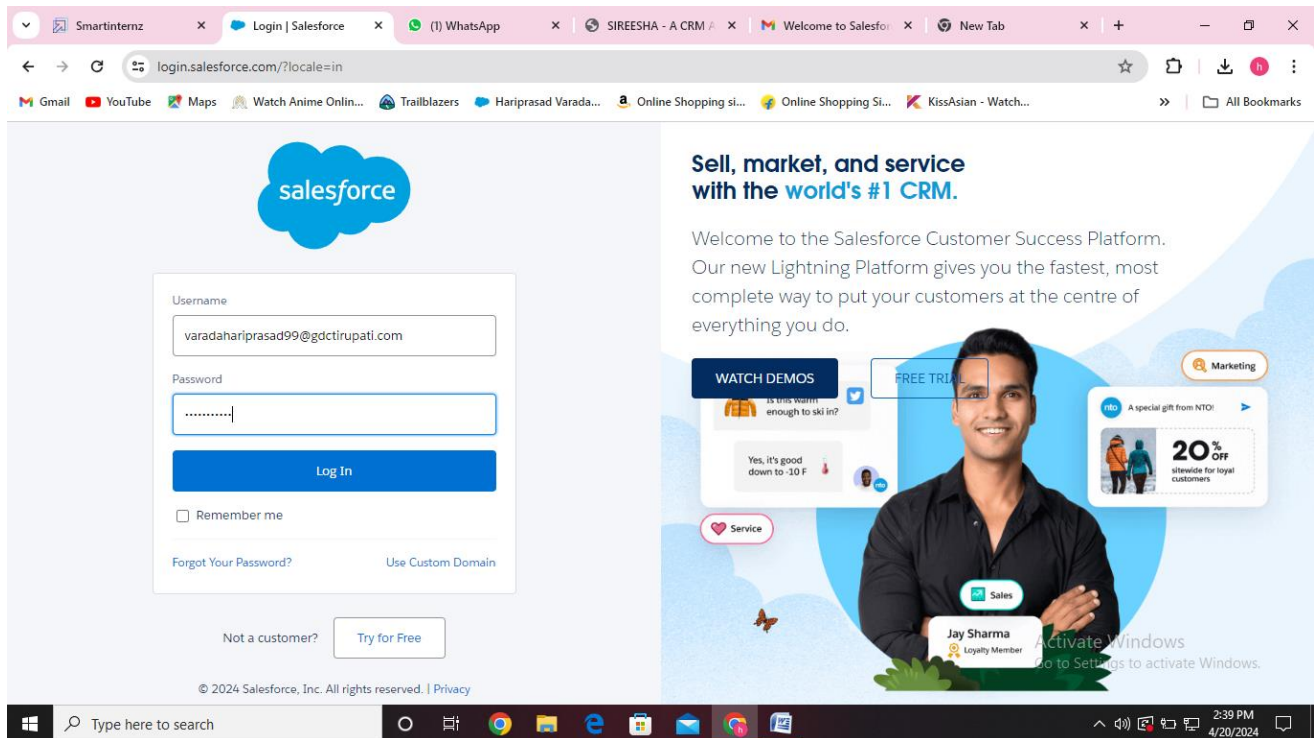


## Login to your Salesforce Org

1. Go to [salesforce.com](https://login.salesforce.com) and click on login
2. Enter the username and password that you just created.
3. After login this is the home page which you will see.

## Salesforce Login:

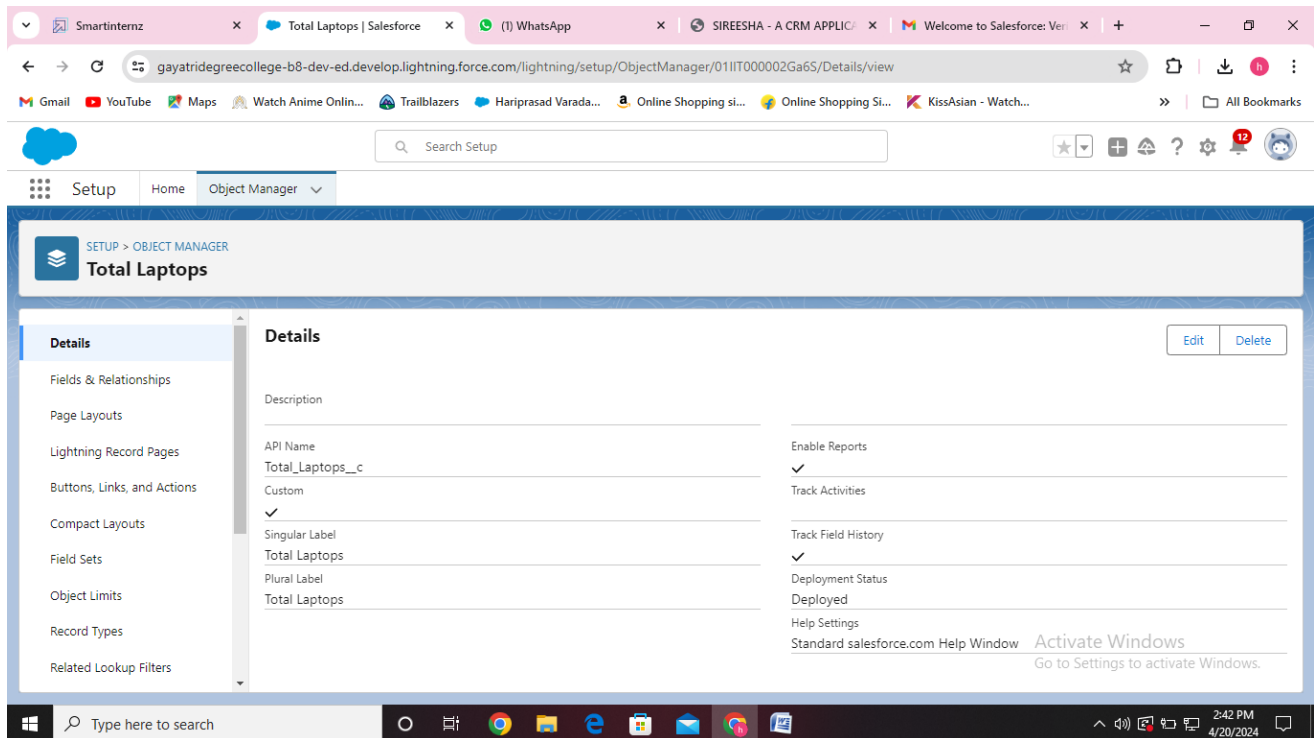
<https://login.salesforce.com>



## Milestone – 02 : Object Creation

### Create Total Laptops Object

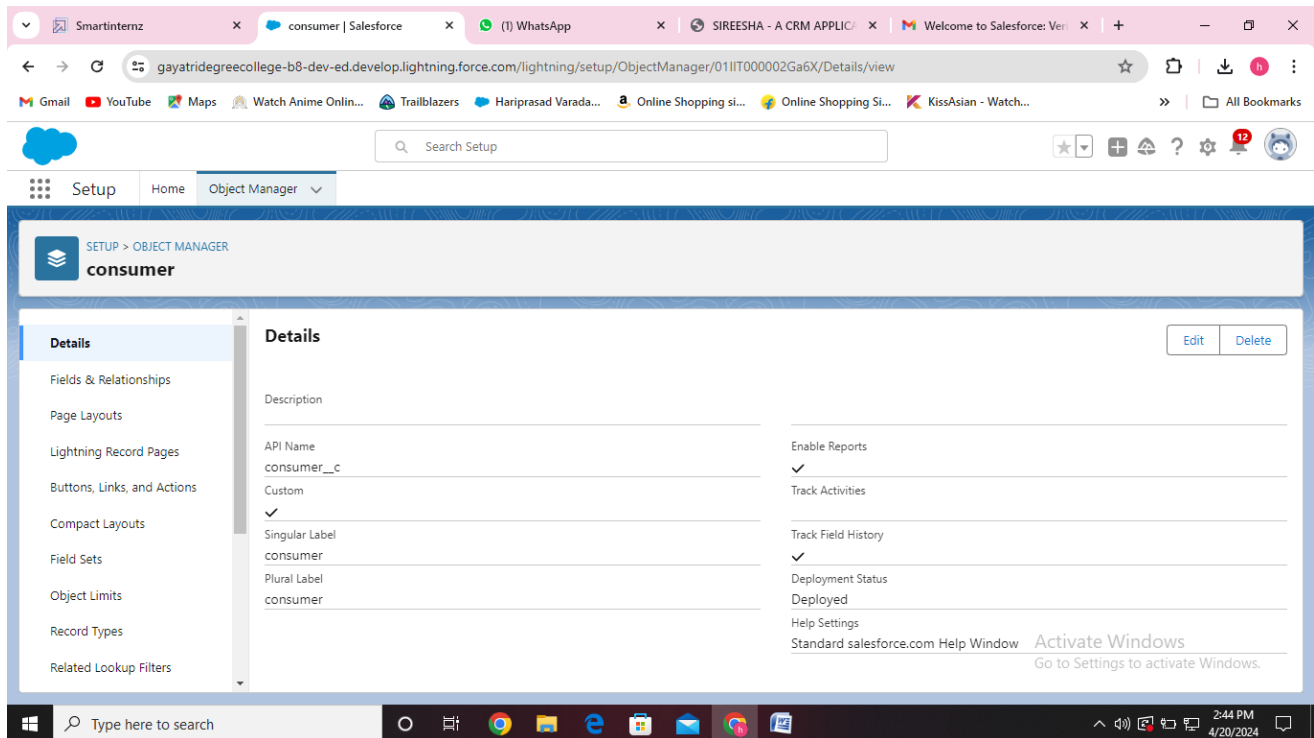
1. From the setup page - Click on Object Manager - Click on Create - Click on Custom Object.
2. Enter the label name- **Total Laptops**
3. Plural label name- **Total Laptops**
4. Enter Record Name Label and Format
5. Record Name -**Total Laptops**
6. Data Type – **Text**
7. Click on Allow reports,Allow search and Track Field History,
8. Allow search - **Save.**



## Create Consumer Object

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

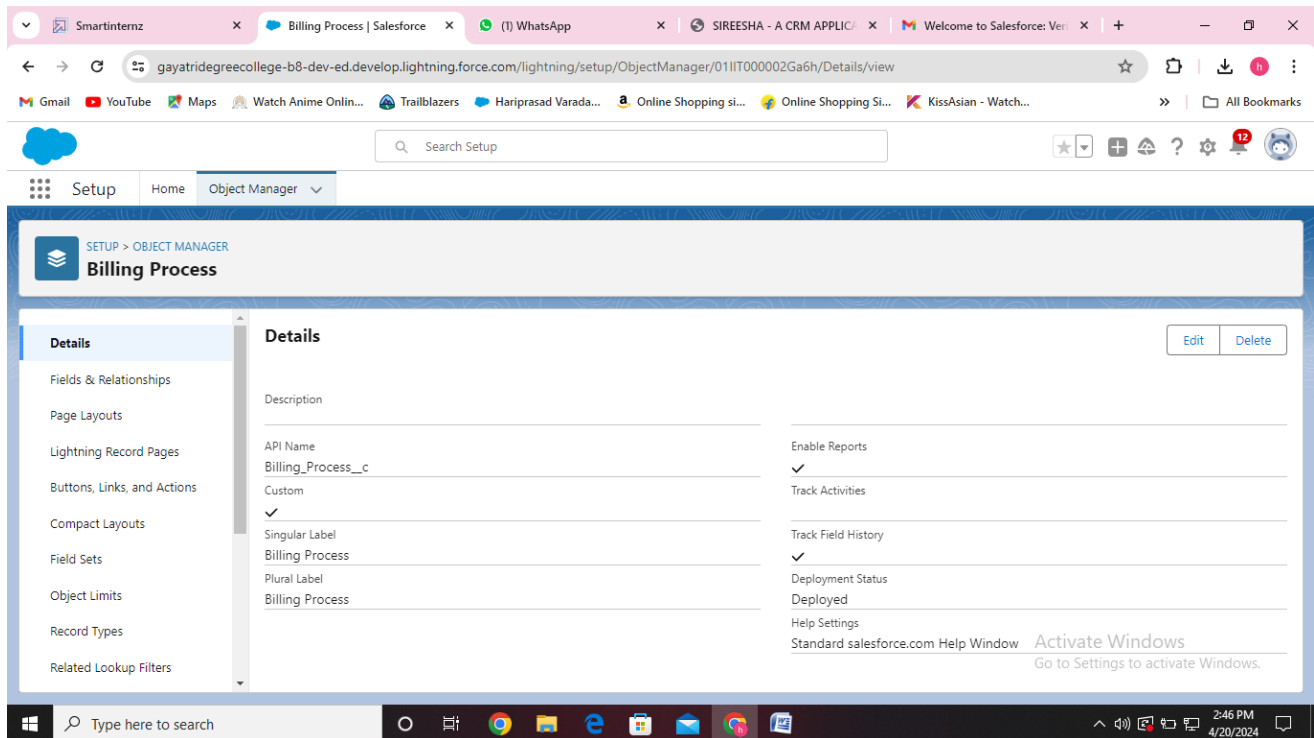
1. Enter the label name-consumer
2. Plural label name- **consumer**
3. Enter Record Name Label and Format
4. Record Name -**consumer\_name**
5. Data Type – Name
6. Click on Allow **reports,Allow** search and Track Field History,
7. Allow search - **Save.**



## Create Billing Process

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

1. Enter the label name- **Billing Process**
2. Plural label name- **Billing Process**
3. Enter Record Name Label and Format
4. Record Name - **Billing ProcessName**
5. Data Type – **Name**
6. Click on Allow reports,Allow search and Track Field History,
7. Allow search - Save.

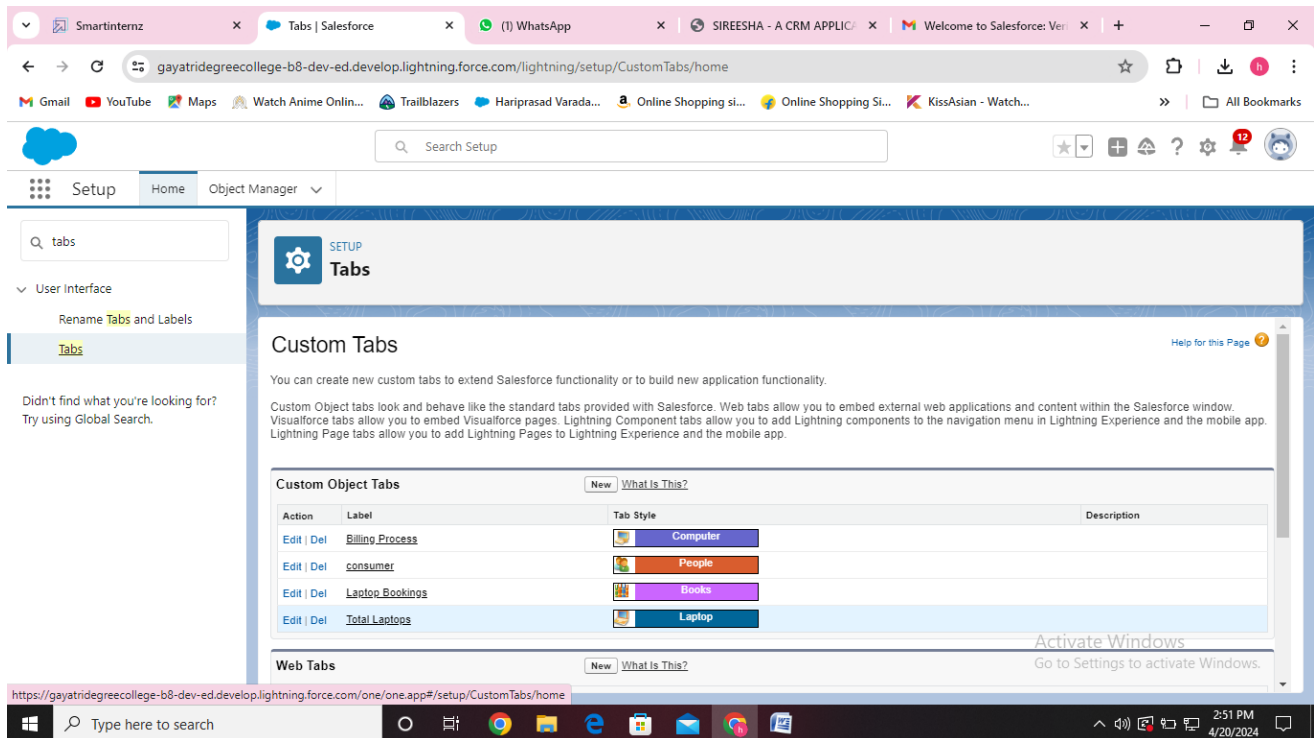


## Milestone – 03 : Tabs

### Creating A Custom Tab

#### To create a Tab:( )

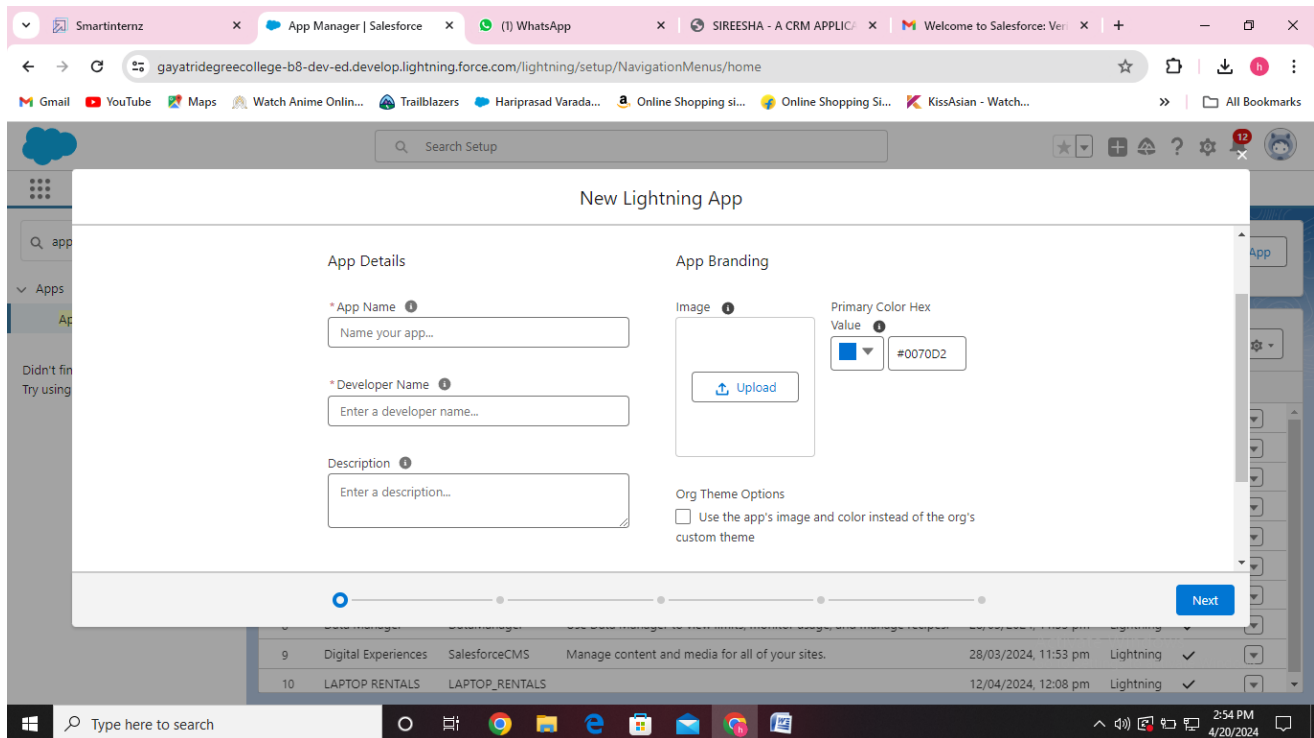
1. Go to setup page - type Tabs in Quick Find bar - click on tabs -New (under custom object tab)
2. Select Object(Total Laptops) - Select the tab style - Next (Add to profiles page) keep it as default - Next (Add to Custom App) uncheck the include tab .
3. Make sure that the Append tab to users' existing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



## Create A Lightning App

### To create a lightning app page:

1. Go to setup page -search "app manager" in quick find - select "app manager" -click on New lightning App.
2. Fill the app name in app details as LAPTOP RENTALS?Next - (App option page) keep it as default -Next - (Utility Items) keep it as default - Next.
3. Upload a photo that is related to your app.
4. To Add Navigation Items:
5. Search profiles (System administrator) in the search bar - click on the arrow button - save & finish.



## Milestone – 04 : Fields

### Creating The Field In Consumer Object

To create fields in an object:

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



## To create another fields in an object:

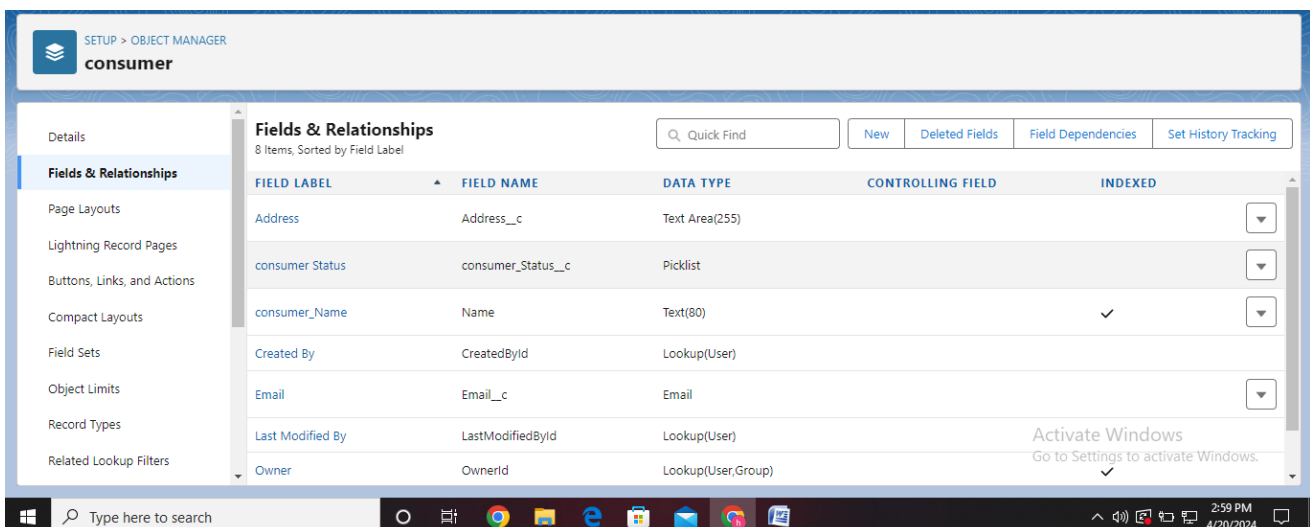
1. Go to setup - click on Object Manager -type object name(consumer) in search bar - click on the object.
2. Now click on “Fields & Relationships” – New
3. Select Data type as a “Email” and Click on Next

## To create another fields in an object:

1. Go to setup - click on Object Manager - type object name(consumer) in search bar - click on the object.
2. Now click on “Fields & Relationships” - New
3. Select Data type as a “Text Area” and Click on Next
4. Fill the Above as following:

Field Label: Address

- Field Name : It's gets auto generated
- Select Required field
- Click on Next - Next - Save and new.



SETUP > OBJECT MANAGER  
consumer

Details

**Fields & Relationships**  
8 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

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

Activate Windows  
Go to Settings to activate Windows.

## To create fields in an object:

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

## To Create a Fields & Relationship to an Laptop Booking Object

1. To create fields & relationship to an object:
2. 1.Go to setup ? click on Object Manager - type object name(Laptop Booking) in the search bar - click on the object.
3. 2.Now click on “Fields & Relationships” - New
4. 3.Select Data Type as a “Picklist”
5. 4.Picklist values are:-**1.core i3 2. Core i5 3. Core i7**
6. Select required
7. 6.Click on Next - Next - Save and newClick on Next

SETUP > OBJECT MANAGER  
**Laptop Bookings**

Details

**Fields & Relationships**  
13 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_types__c	Picklist	Laptop Names	
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
how many months	how_many_months__c	Picklist		
Laptop Bookings	Laptop_Bookings__c	Picklist		

Activate Windows  
Go to Settings to activate Windows.

Type here to search

3:06 PM  
4/20/2024

## Creation Of Fields & Relationship For Billing Process Object

### To create fields & relationship to an object:

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

1. Go to setup - click on Object Manager - type object name(Billing Process) in the search bar - click on the object.
2. Now click on “Fields & Relationships” - New
3. Select Data Type as a “Lookup Relationship”
4. Click on Next
5. Click on the Related to drop down and Select the Laptop Booking object
1. 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.
- Creation of another fields for the billing process object To create fields in an object:

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

3. Select Data Type as a “Picklist”

4. Fill the Above as following: Field Label: Payment Mode

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

1. Cash

2. Check

3. Credit card

4. Debit card

5. UPI

6. Phonepe

7. Gpay

8. Paytm

- Select required

- Click on Next - Next - Save and new

Setup | Home | Object Manager

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		

Activate Windows  
Go to Settings to activate Windows

Type here to search

3:15 PM  
4/20/2024

## Creating The Field In Total Laptops Object

### To create fields in an object:

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

2. Now click on “Fields & Relationships” - New

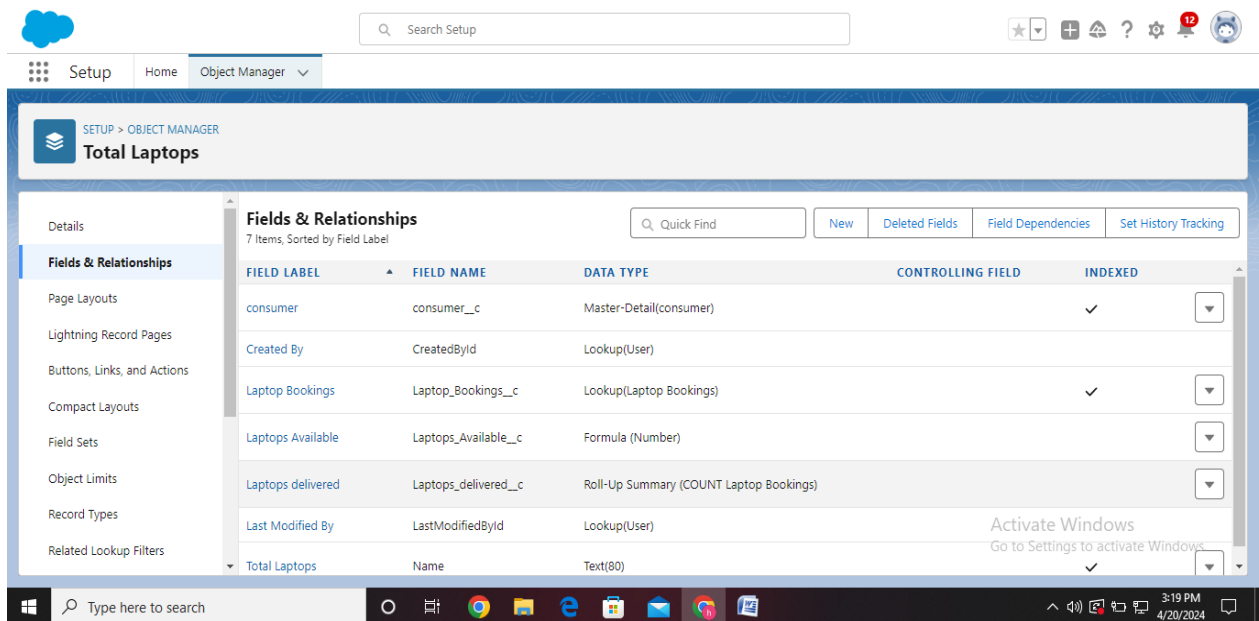
3. Select Data type as a “Formula” and Click on Next

4 Fill the Above as following:

5. Field Label: Laptops Available

6. Field Name : It's gets auto generated 7. Select the Formula Return Type as

“Number 8. Select the Decimal places as “0” and Click on Next



The screenshot shows the Salesforce Setup interface for the 'Total Laptops' object. The 'Fields & Relationships' tab is selected, displaying a table of fields. The 'Laptops Available' field is highlighted, showing it is a Formula (Number) type. The table includes columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
consumer	consumer__c	Master-Detail(consumer)		✓
Created By	CreatedById	Lookup(User)		
Laptop Bookings	Laptop_Bookings__c	Lookup(Laptop Bookings)		✓
Laptops Available	Laptops_Available__c	Formula (Number)		
Laptops delivered	Laptops_delivered__c	Roll-Up Summary (COUNT Laptop Bookings)		
Last Modified By	LastModifiedById	Lookup(User)		
Total Laptops	Name	Text(80)		✓

## Milestone – 05 : Validation Rule

Creating the validation rule for phone number field in consumer object

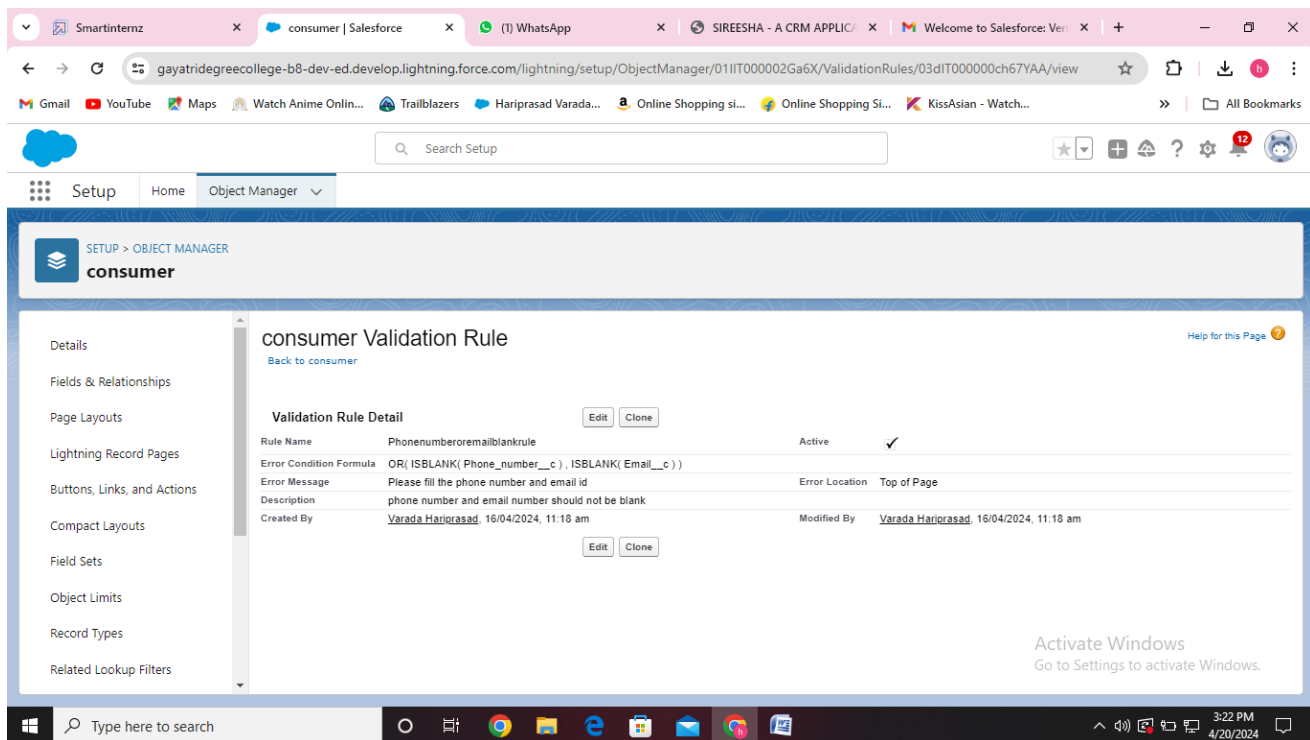
1. Go to the setup page - click on object manager - From drop down click edit for consumer object.

2. Click on the validation rule - click New.

3. Enter the Rule name as “Phonenumberoremailblankrule”.

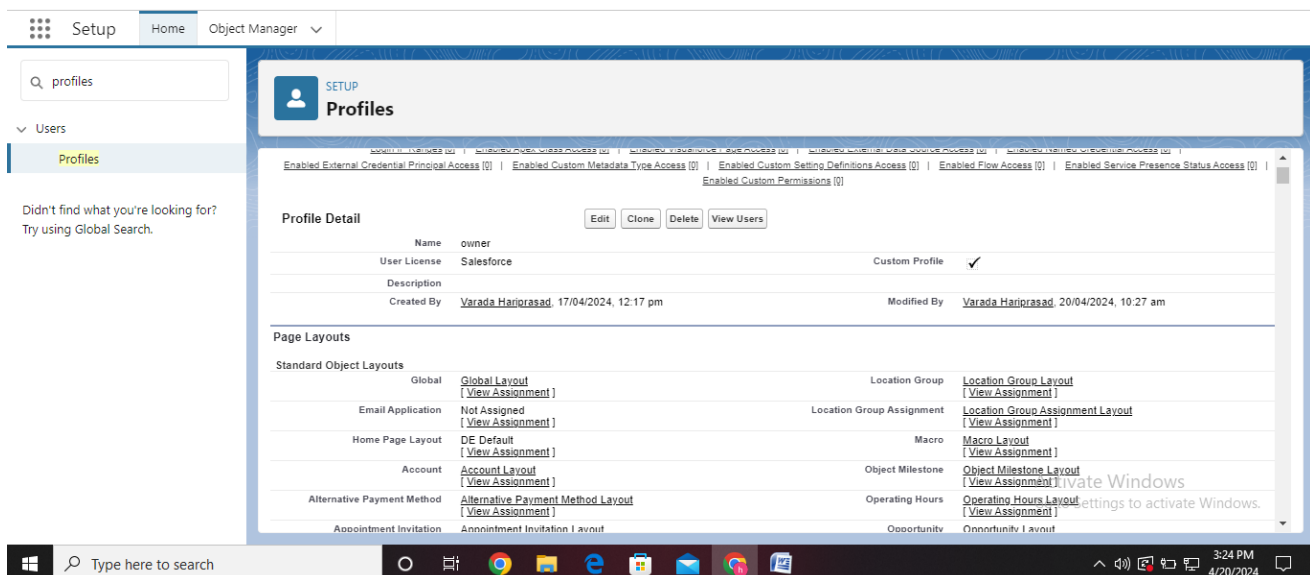
4. Enter the description as “phone number and email number should not be blank”.

5. Enter the formula as “OR( ISBLANK( phone\_number\_\_c ) , ISBLANK( email\_\_c ) )” and check the syntax. 6. Save the validation rule.



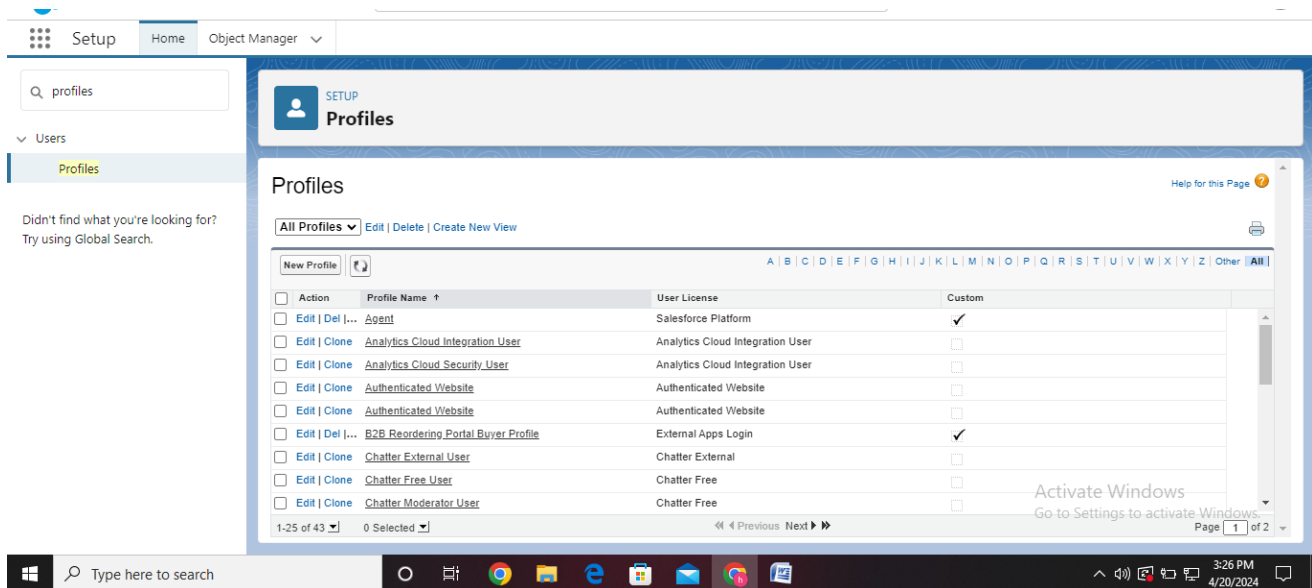
## Milestone – 06 : Owner Profile To create a new profile:

1. Go to setup - type profiles in quick find box - click on profiles - clone the desired profile (Standard User) - enter profile name (owner) - Save.
2. Scroll down to Custom Object Permissions and Give access permissions for Total Laptops, consumers , Laptop Booking and Billing Process objects as mentioned in the below diagram.
3. Give Access and Save it.



## Agent Profile :

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



## Milestone – 07 : Roles And Hierarchy

### 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.

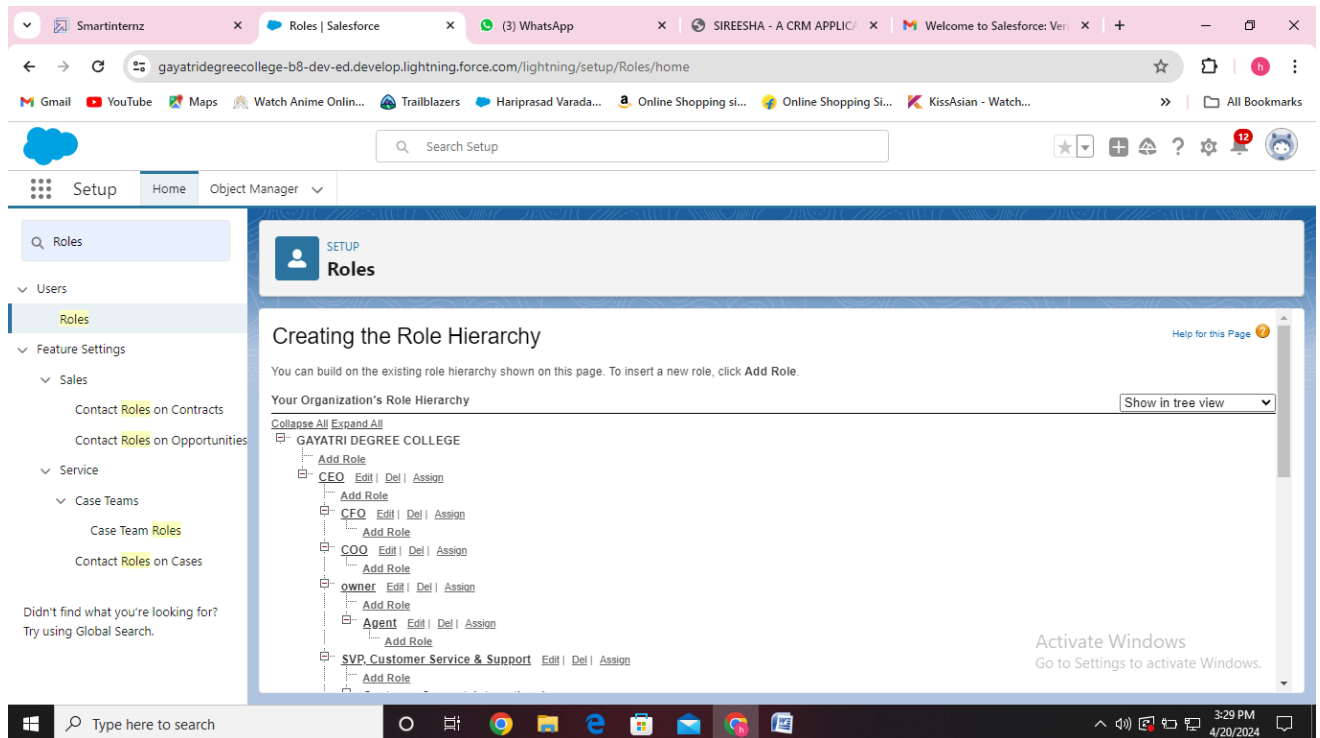
## Activity 2:

### Creating Agent roles

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

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

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



## Milestone – 08 : Users Create User

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

## Activity 2: creating another users

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



7. Username : Username should be in this form: [text@text.text](#)
8. Nick Name : Give a Nickname
9. Role : Agent
10. User license : Salesforce platform
11. Profiles : standard platform user.
12. Save it.

The screenshot shows the Salesforce 'New User' setup page. The 'User Edit' form is displayed with the following fields:

- General Information:**
  - First Name: vicky
  - Last Name: rushi
  - Alias: vrush
  - Email: udayrushi00@gmail.com
  - Username: udayrushi00@456789gmail
  - Nickname: vicky
  - Title:
  - Company:
  - Department:
  - Division:
- Role:**
  - Role: owner
  - User License: Salesforce
  - Profile: Standard User
  - Active: ☒
  - Marketing User: ☐
  - Offline User: ☐
  - Knowledge User: ☐
  - Flow User: ☐
  - Service Cloud User: ☐
  - Site.com Contributor User: ☐
  - Site.com Publisher User: ☐
  - WDC User: ☐
  - Data.com User Type: --None--
  - Data.com Monthly Addition Limit: Default Limit (300)

The page also includes a 'Help for this Page' link and a 'Save' button.

## Milestone – 9 : Flows Create A Flow On Dell Laptop

1. Go to setup -type Flow in quick find box - Click on the Flow and Select the New Flow.
2. Select the Record-triggered flow and Click on Create.
3. Select the Object as a Laptop Booking in the Drop down list.
4. Select the Trigger Flow when: "A record is Created or Updated".
5. Select the Optimize the flow for: "Actions and Related Records" and Click on Done.
6. Under the Record-triggered Flow Click on "+" Symbol and In the Drop down List select the "Decision Element".
7. Enter the Details Label: Field should be Update, API name: Gets Automatically Generated.
8. Enter the Outcome Details Label: dell , Outcome API name: Gets Automatically Generated.
9. Resource: Select Record.Laptop booking\_\_c.

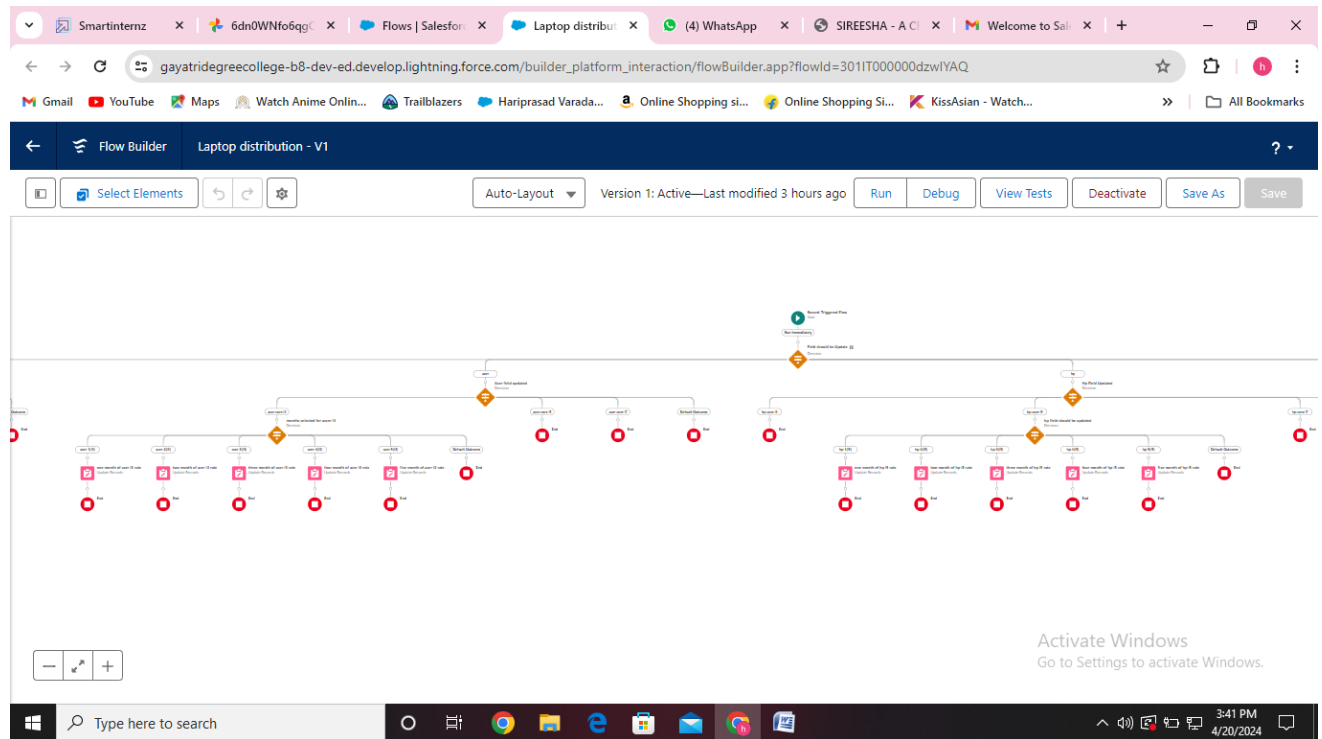
10. Operator: Select Equals.
11. Value: Select dell
12. Add the same outcome order to acer , hp,mac.
13. Click done.
14. Go to flow page
15. Beside dell there is a symbol '+' click on that.
16. Again select decision
17. Enter the Details Label: Field should Update(any one u want),  
API name: Gets Automatically Generated.
18. select the Outcome Details Label: dell core i3 , Outcome  
API name: Gets Automatically Generated.
19. Resource: Select Record.core type.
20. Operator: Select Equals.
21. Value: Select core i3.
22. Then again click the symbol '+' outcome details
23. select the Outcome '+' Details Label: dell core i5 , Outcome API name: Gets  
Automatically Generated.
24. Resource: Select Record.core type.
25. Operator: Select Equals.
26. Value: Select core i5.
27. Then again click the symbol '+' outcome details
28. Enter the Outcome Details Label: dell core i7 , Outcome API name: Gets  
Automatically Generated.
29. Resource: Select Record.core type.
30. Operator: Select Equals.
31. Value: Select core i7.
32. Click done.
33. So go to the flow page select '+' after core i3 then again select the decision.
34. Enter the Details Label: months selected , API name: Gets Automatically  
Generated.
35. Enter the Outcome Details Label: dell 1(i3) , Outcome API name: Gets  
Automatically Generated.
36. 37. Resource: Select Record.how many months.
38. Operator: Select Equals.

39. Value: 1.
40. Enter the Outcome Details Label: dell 2(i3) , Outcome API name: Gets Automatically Generated.
41. Resource: Select Record.how many months.
42. Operator: Select Equals.
43. Value: Select 2..
44. Click '+' outcome details
45. Enter the Outcome Details Label: dell 3(i3) , Outcome API name: Gets Automatically Generated.
46. Resource: Select Record.how many months.
47. Operator: Select Equals.
48. Value: Select 3..
49. Click '+' outcome details
50. Enter the Outcome Details Label: dell 4(i3) , Outcome API name: Gets Automatically Generated.
51. Resource: Select Record.how many months.
52. Operator: Select Equals.
53. Value: Select 4..
54. Click '+' outcome details
55. Enter the Outcome Details Label: dell 5(i3) , Outcome API name: Gets Automatically Generated.
56. Resource: Select Record.how many months.
57. Operator: Select Equals.
58. Value: Select 4.
59. Follow the above picture you will understand.
60. After dell 1(i3) there is '+' symbol like dell 2(i3),dell 3(i3),dell 4(i3),dell 5(i3).
61. Click on '+' then select update records
62. Enter the Details Label: one month of dell i3 rate , API name: Gets Automatically Generated.
63. 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
64. Click done.
65. Enter the Details Label: months selected ,  
API name: Gets Automatically Generated.

66. Enter the Outcome Details Label: dell 1(i7) , Outcome API name: Gets Automatically Generated.
67. 68. Resource: Select Record.how many months.
69. Operator: Select Equals.
70. Value: 1.
71. Enter the Outcome Details Label: dell 2(i7) , Outcome API name: Gets Automatically Generated.
72. Resource: Select Record.how many months.
73. Operator: Select Equals.
74. Value: Select 2..
75. Click '+' outcome details
76. Enter the Outcome Details Label: dell 3(i7) , Outcome API name: Gets Automatically Generated.
77. Resource: Select Record.how many months.
78. Operator: Select Equals.
79. Value: Select 3..
80. Click '+' outcome details
81. Enter the Outcome Details Label: dell 4(i7) , Outcome API name: Gets Automatically Generated.
82. Resource: Select Record.how many months.
83. Operator: Select Equals.
84. Value: Select 4.
85. Click '+' outcome details
86. Enter the Outcome Details Label: dell 5(i7) , Outcome API name: Gets Automatically Generated.
87. Resource: Select Record.how many months.
88. Operator: Select Equals.
89. Value: Select 5.
90. follow the above picture you will understand.
91. After dell 1(i7) there is '+' symbol like dell 2(i7),dell 3(i7),dell 4(i7),dell 5(i7).
92. Click on '+' then select update records
93. Enter the Details Label: one month of dell i5 rate , API name: Gets Automatically Generated.

94. 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

95. Click done.



## Milestone – 10 : Apex

### Creating Classes :

1. Login to the trailhead account and navigate to the gear account in the top right corner.
2. Then we can see the Developer console. Click on the developer console and you will navigate to a new console window.
3. Then you can see many tools in the Toolbar of the new console window. Click on File, New and Apex Class.
4. Enter the name of the class to create a new class file.

```
public class LaptopBookingHandler {  
    public static void sendEmailNotification (List lapList){  
        for(Laptop_Bookings__c lap:lapList)  
        {
```

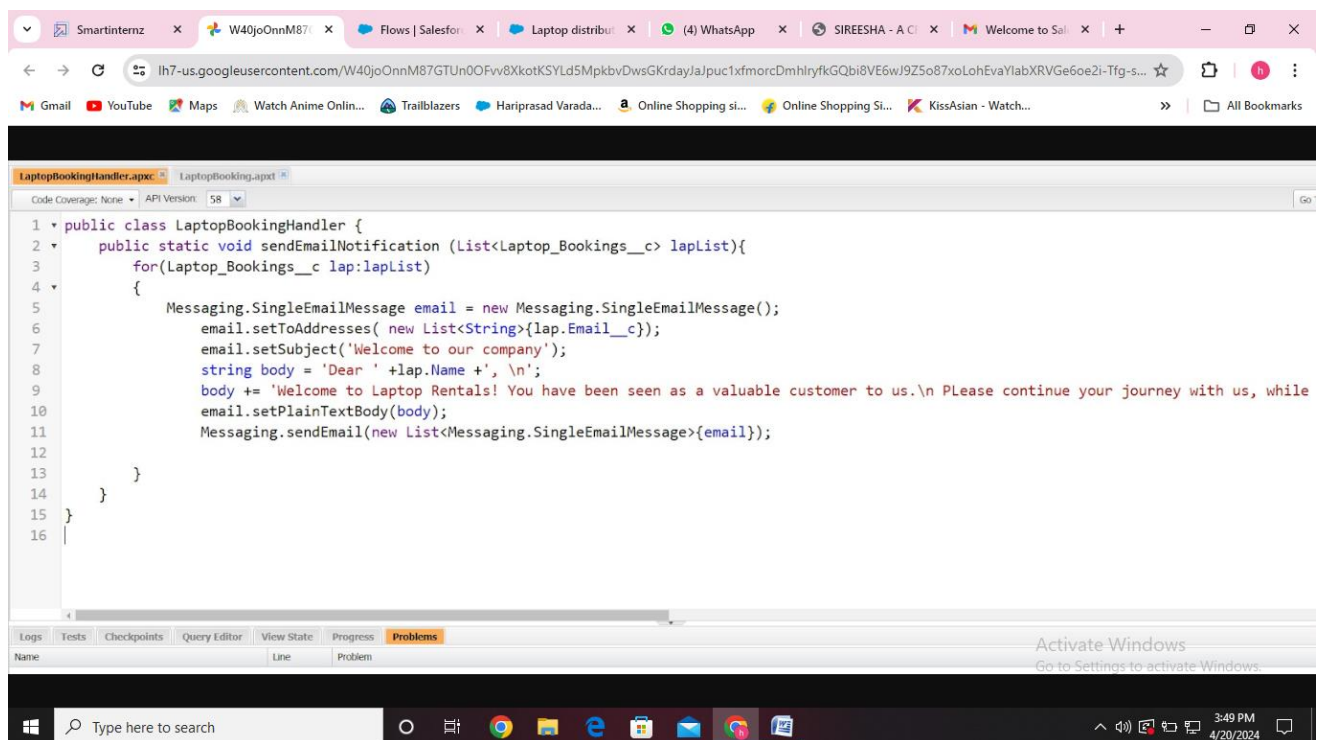
```
            Messaging.SingleEmailMessage  
            email = new Messaging.SingleEmailMessage();  
            email.setToAddresses( new List{lap.Email__c});  
            email.setSubject('Welcome to our company');  
            string body = 'Dear ' +lap.Name +', \n';
```

```

        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{email});
    }
}
}

```

1. .Class name:- LaptopBookingHandler
2. 2.API Name:- Laptop\_Bookings\_\_c(as per your org go to laptop booking object and copy from that).
3. 3.core\_\_c (as per your org go to laptop booking object and copy from that).
4. 4.Laptop\_type\_\_c.(as per your org go to laptop booking object and copy from that).



How to create a new trigger :

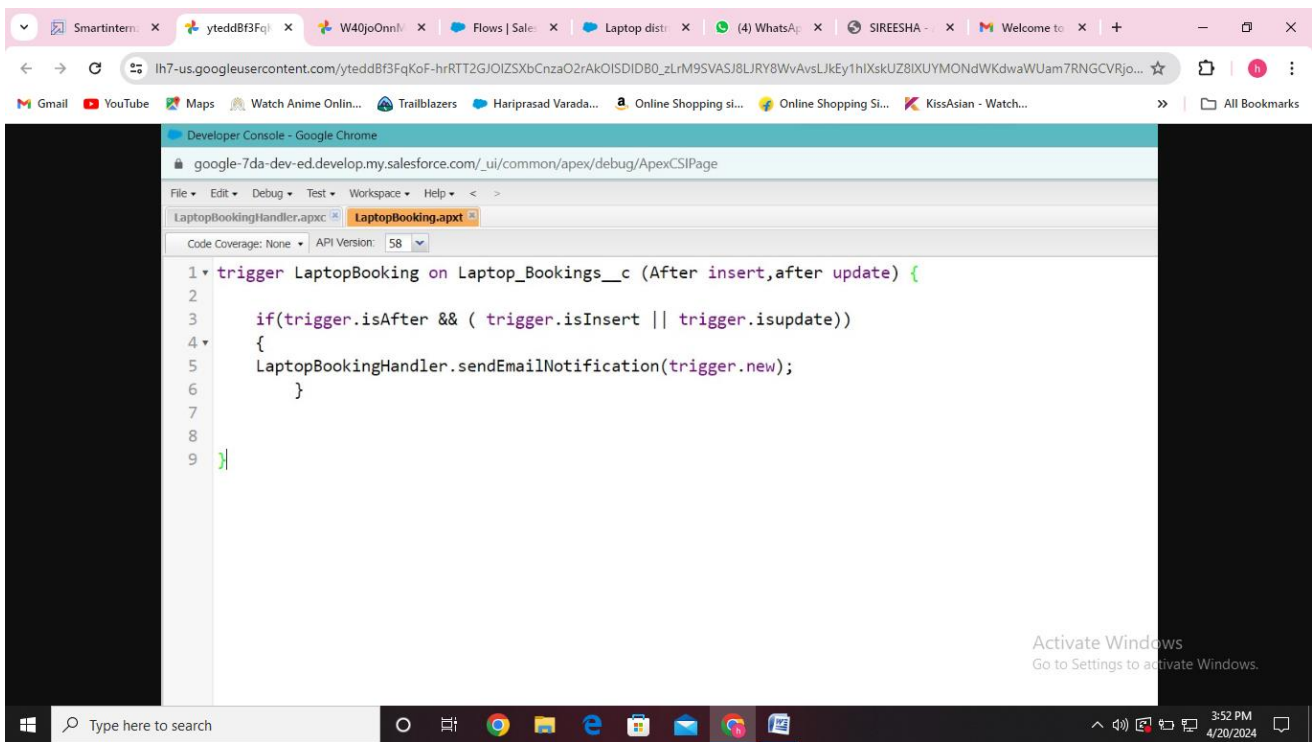
While still in the trailhead account, navigate to the gear icon in the top right corner.

2. Click on developer console and you will be navigated to a new console window.

3. Click on the File menu in the toolbar, and click on new- Trigger.
4. Enter the trigger name and the object to be triggered.
5. LaptopBooking - trigger name
6. Laptop\_Bookings\_\_c -as per your org(go to laptop bookings object and copy from that object api name).

trigger LaptopBooking on Laptop\_Bookings\_\_c (After insert,after update)

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



## Milestone – 11 : Reports Create Report

1. Go to the app -click on the reports tab
2. Click New Report.
3. Select report type from category or from report type panel or from search panel  
“consumer with Laptop Bookings and total laptops” - click on start report.
4. Customize your report
5. Add fields from left pane as shown below
6. Click apply it.

Report: consumers with Laptop Bookings and Total Laptops  
**consumer with laptops and total laptops**

Total Records: 11    Total Amount: ₹81,600

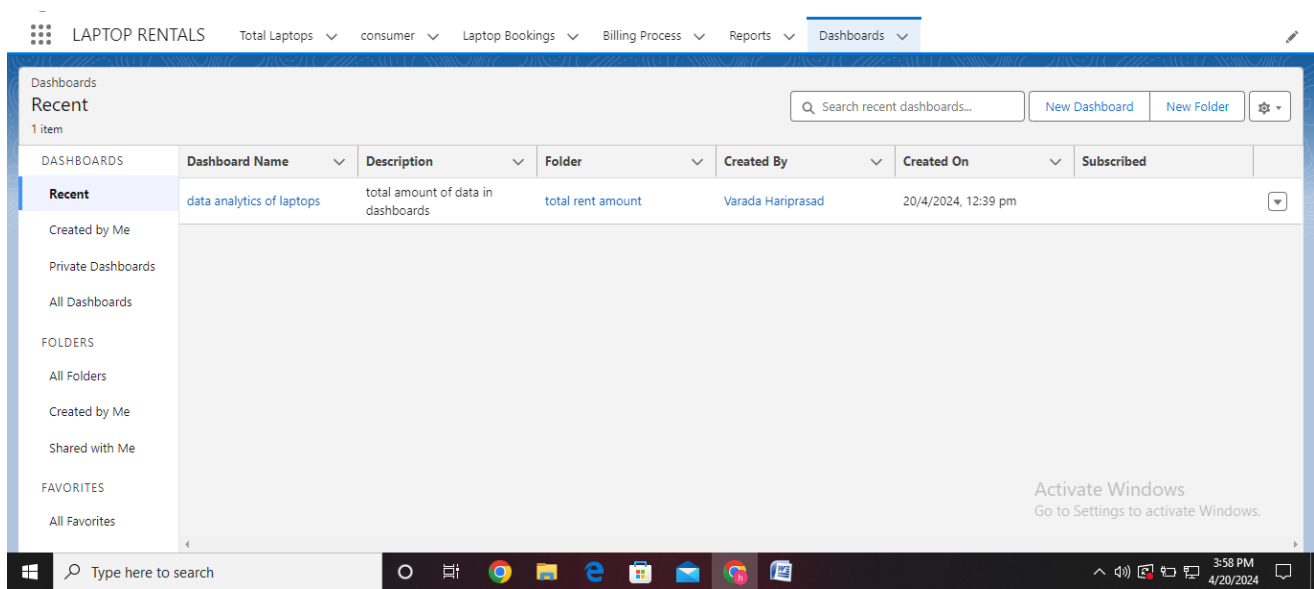
consumer: consumer Name	Laptop Bookings: Laptop Bookings Name	Address	phone number	Laptop names	core type	types	Amount	types of versions
<input type="checkbox"/> rakesh (1)	smartinternz	warangal	7894561235	Mac	Bionic chip	high	₹8,000	high
<b>Subtotal</b>								₹8,000
<input type="checkbox"/> rushi (2)	google	gachibowli	7538964123	Dell	core i5	high	₹6,000	high
	code hub	gachibowli	7538964123	Mac	Bionic chip	high	₹8,000	high
<b>Subtotal</b>								₹14,000
<input type="checkbox"/> suny (1)	smartinternz	madhapur	7534127896	Dell	core i3	high	₹3,000	high
<b>Subtotal</b>								₹3,000
<input type="checkbox"/> sure (4)	smartinternz	kphb	7895621430	Acer	core i5	high	₹6,500	high
	pandora	kphb	7895621430	Hp	core i7	high	₹11,000	very high
	stacknexus	kphb	7895621430	Acer	core i7	high	₹9,000	high
	stacknexus	kphb	7895621430	Acer	core i3	high	₹3,600	high
<b>Subtotal</b>								₹30,100
<input type="checkbox"/> uday (3)	pandora	uppal	7894561230	Hp	core i5	high	₹8,500	high
<b>Subtotal</b>								₹8,500
<b>Grand Total</b>								₹81,600

Row Counts: ☒ Detail Rows ☒ Subtotals ☒ Grand Total



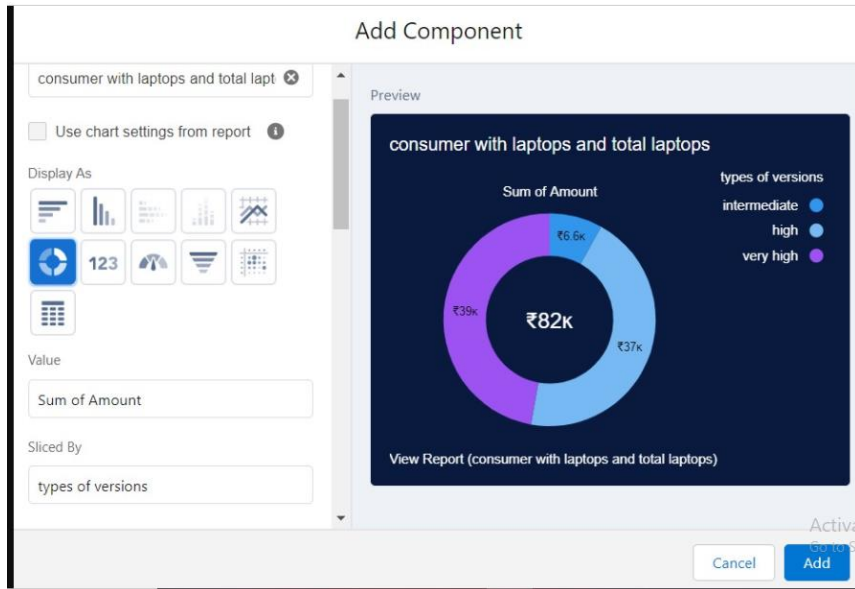
## Milestone – 12 : Dashboards Create Dashboard Folder

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



## Create Dashboard

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



**THE END**