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 :


1. First name & Last name – **Avilala Ravi Kumar**

2. Role: **Developer**

3. Email : **aravikumary806@gmail.com**

4. Company: **GAYATRI DEGREE COLLEGE - TIRUPATI**

5. County: **India**

6. Postal Code: **517501**

7. Username: aravikumary806@gdctirupathi.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
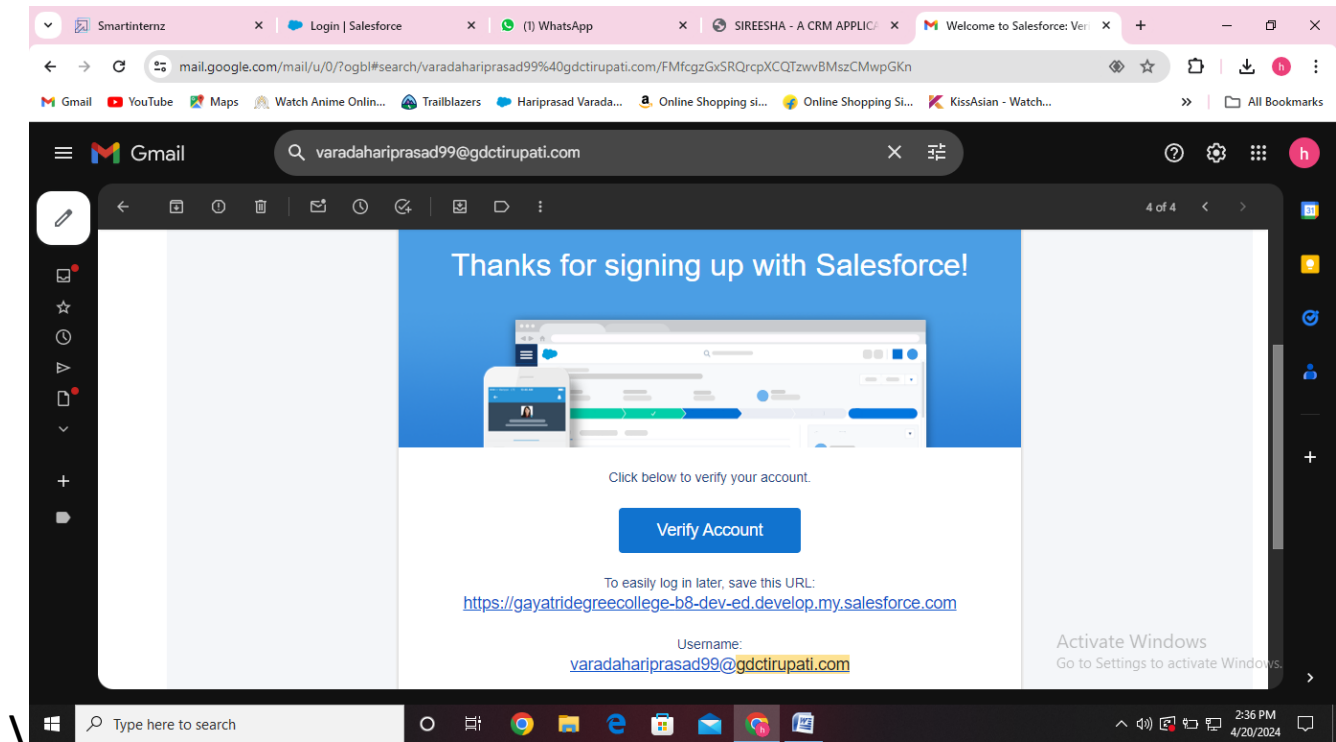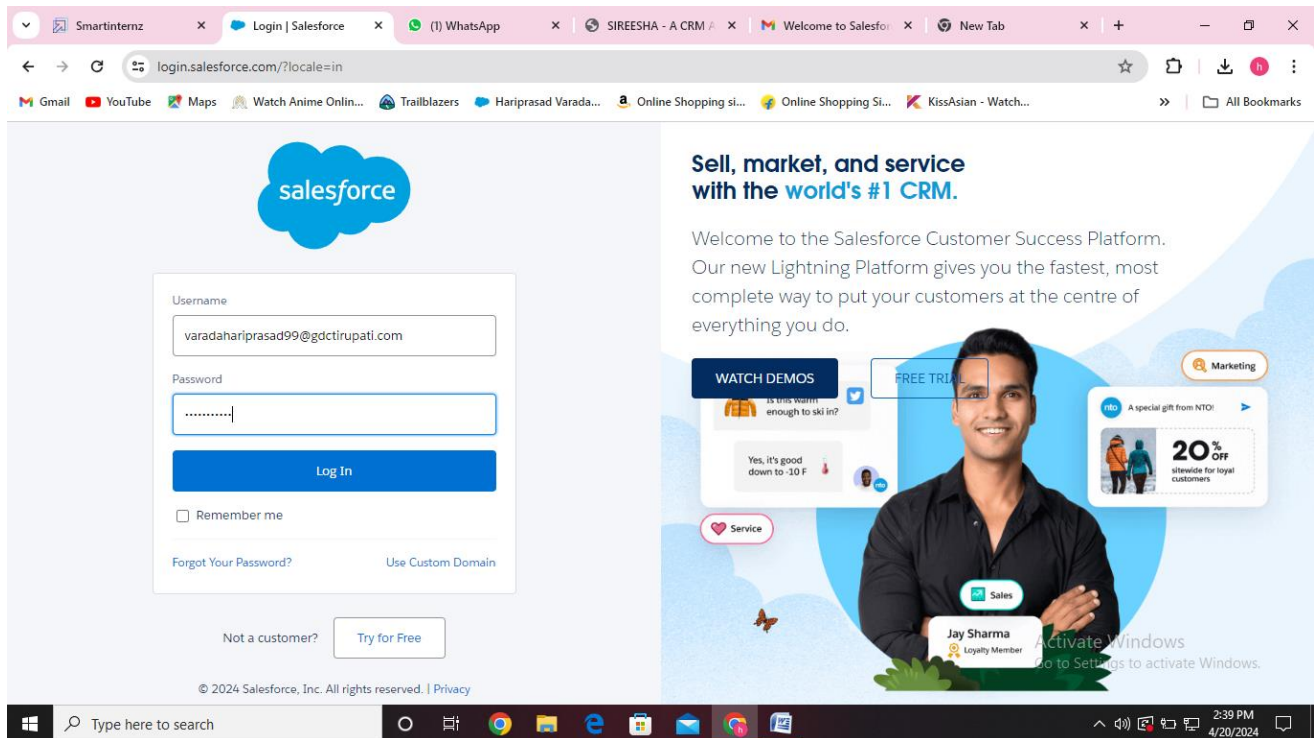

Login to your Salesforce Org

1. Go to salesforce.com 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**

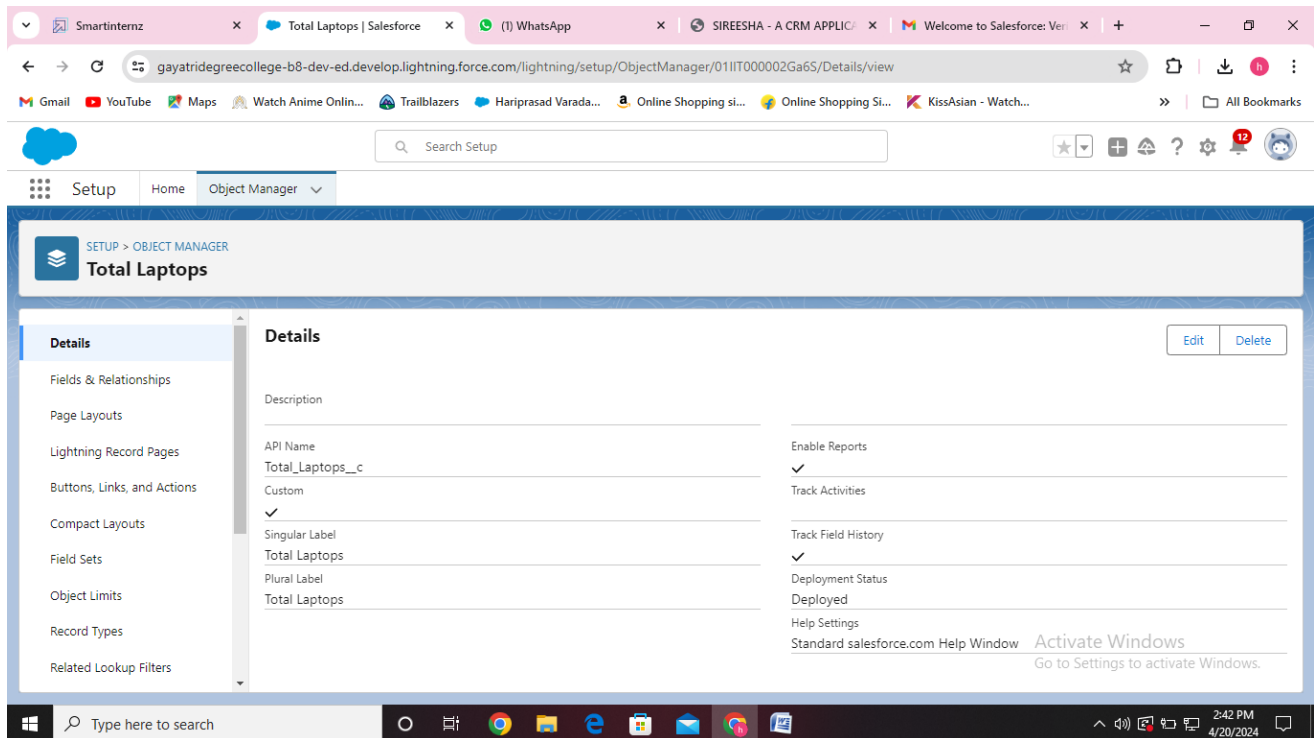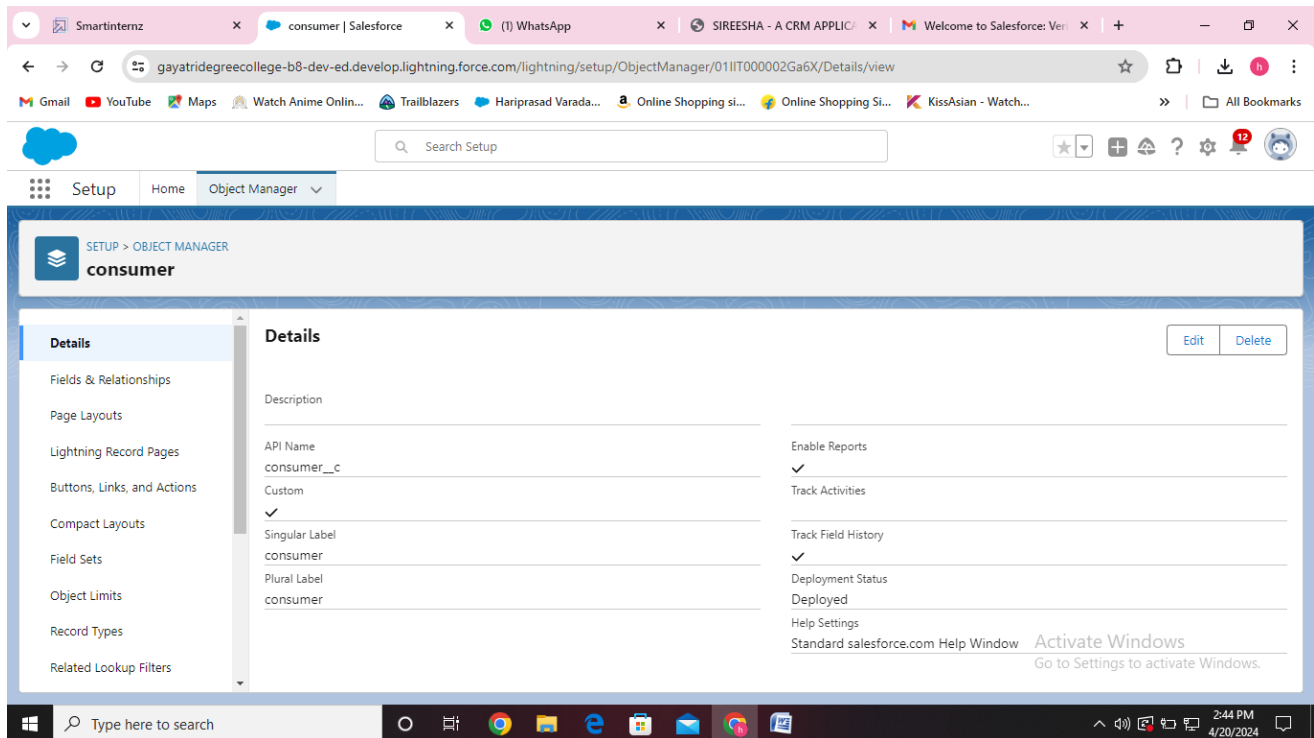 Create Total Laptops Object

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.
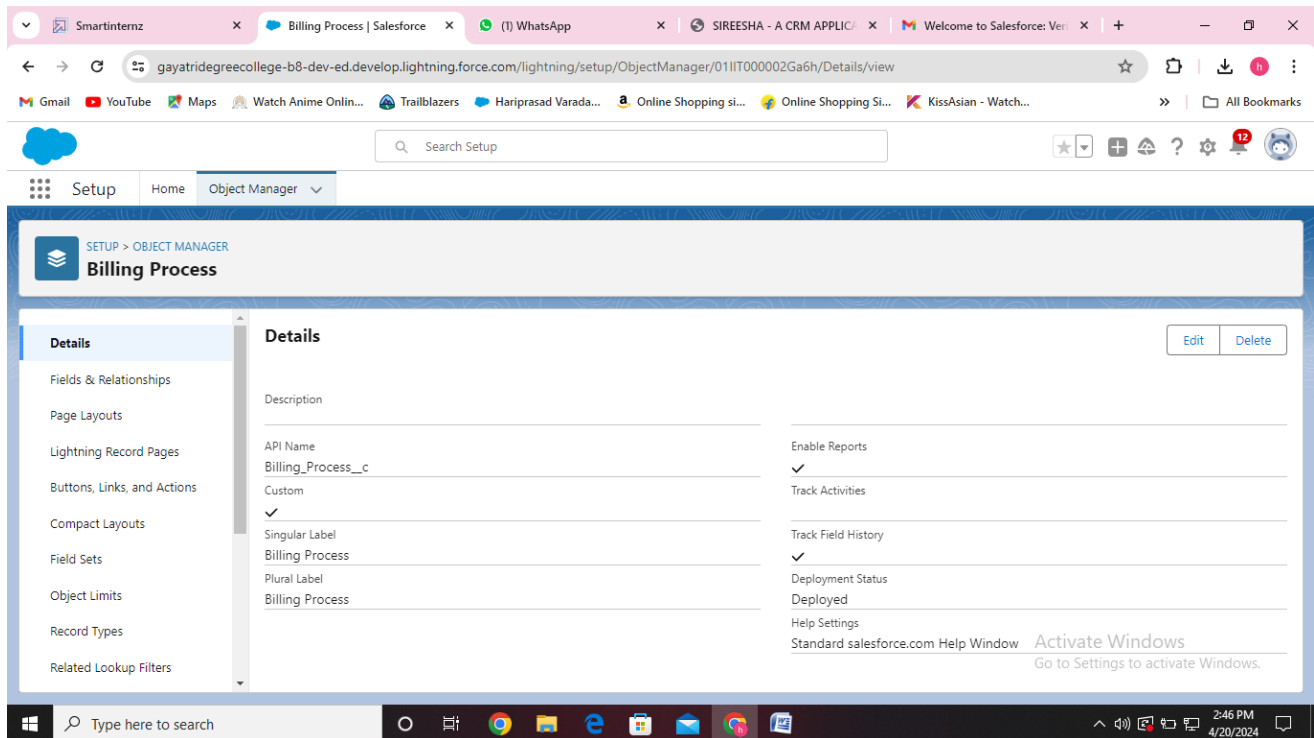
Milestone – 03 : Tabs

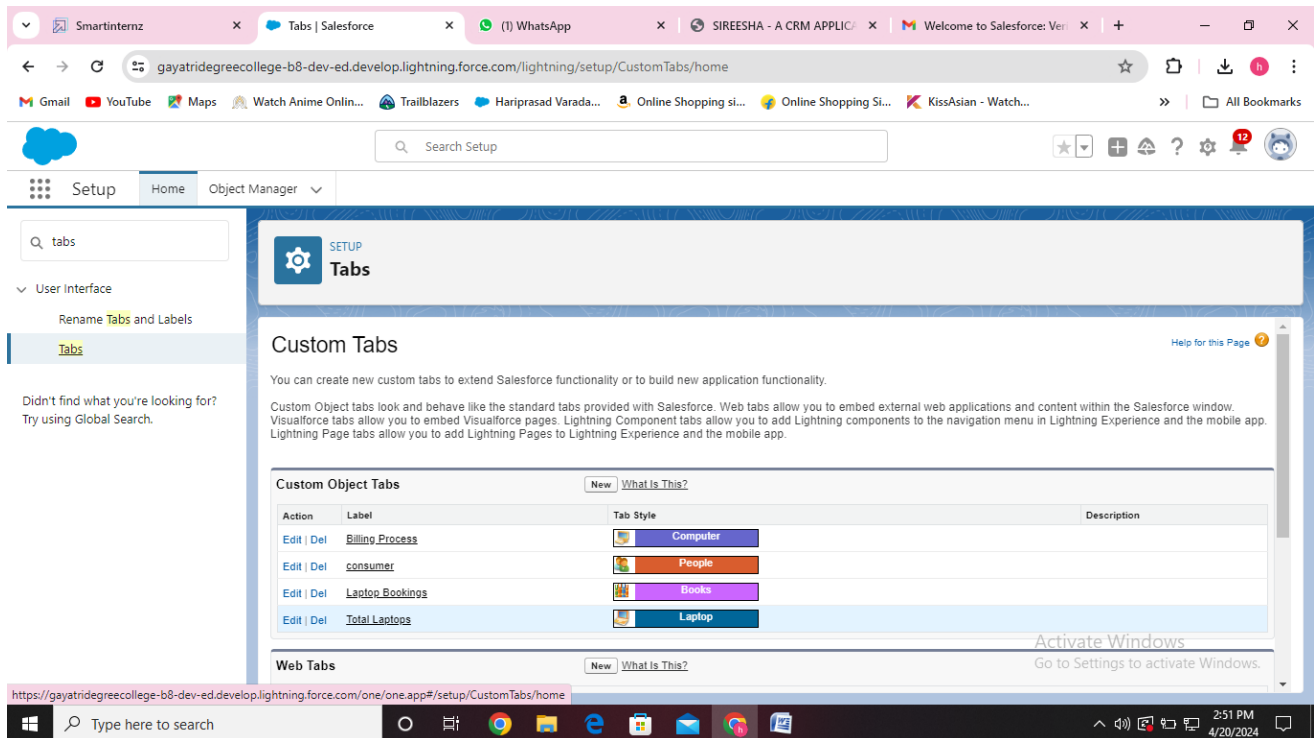Creating A Custom Tab

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.
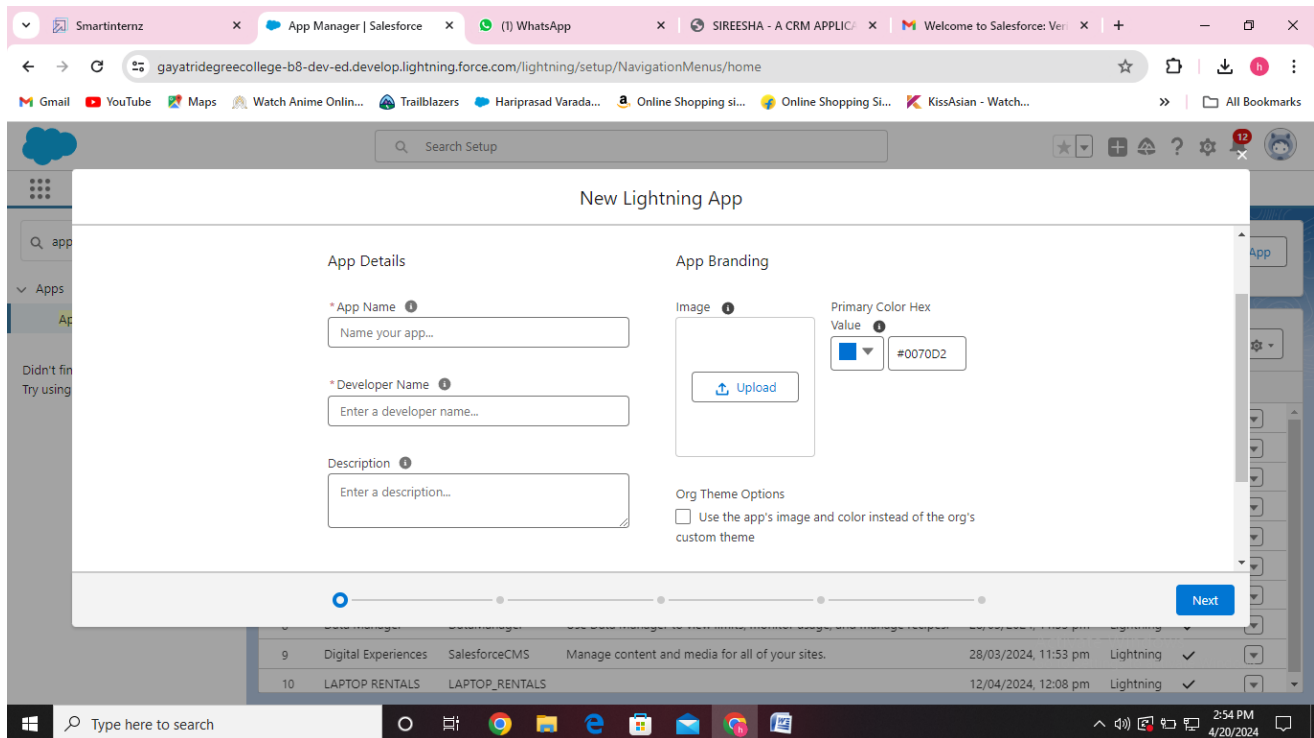
Milestone – 04 : Fields

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.
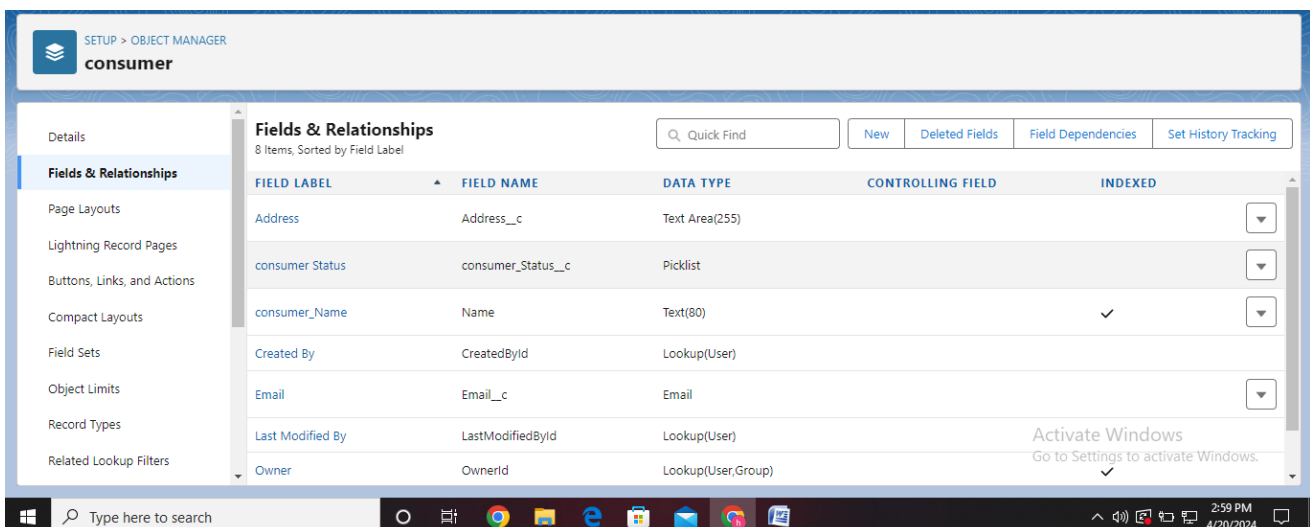
To create another fields in an object:

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.

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

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

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.

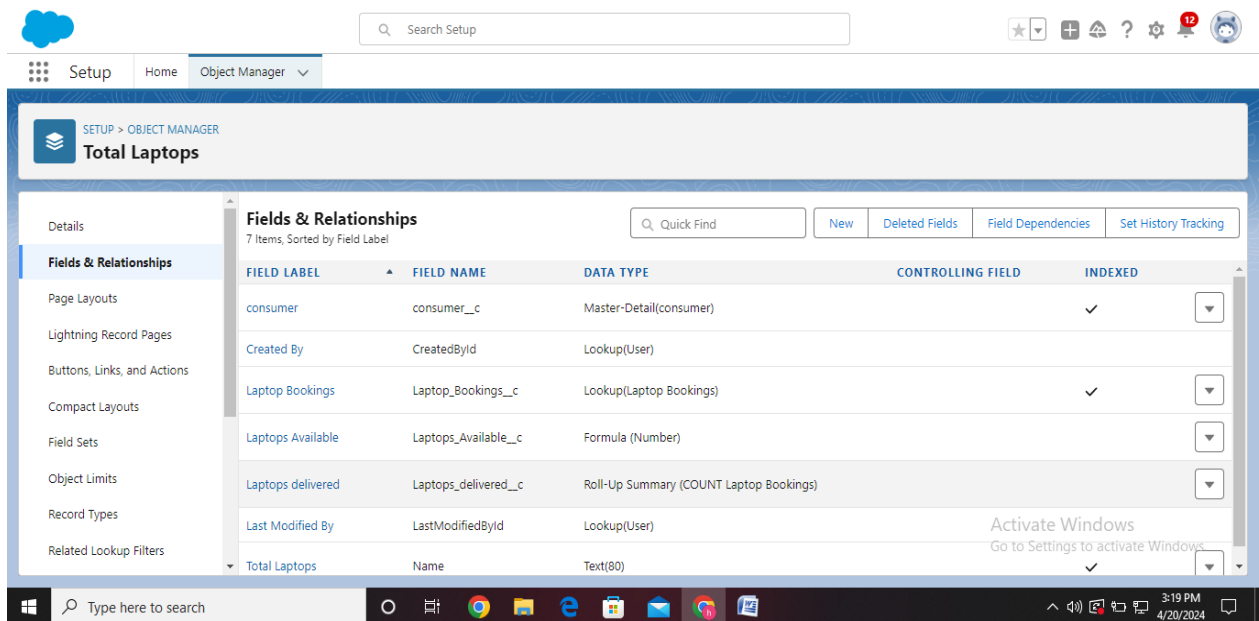2. Now click on "Fields & Relationships" - New

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

4Fill 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

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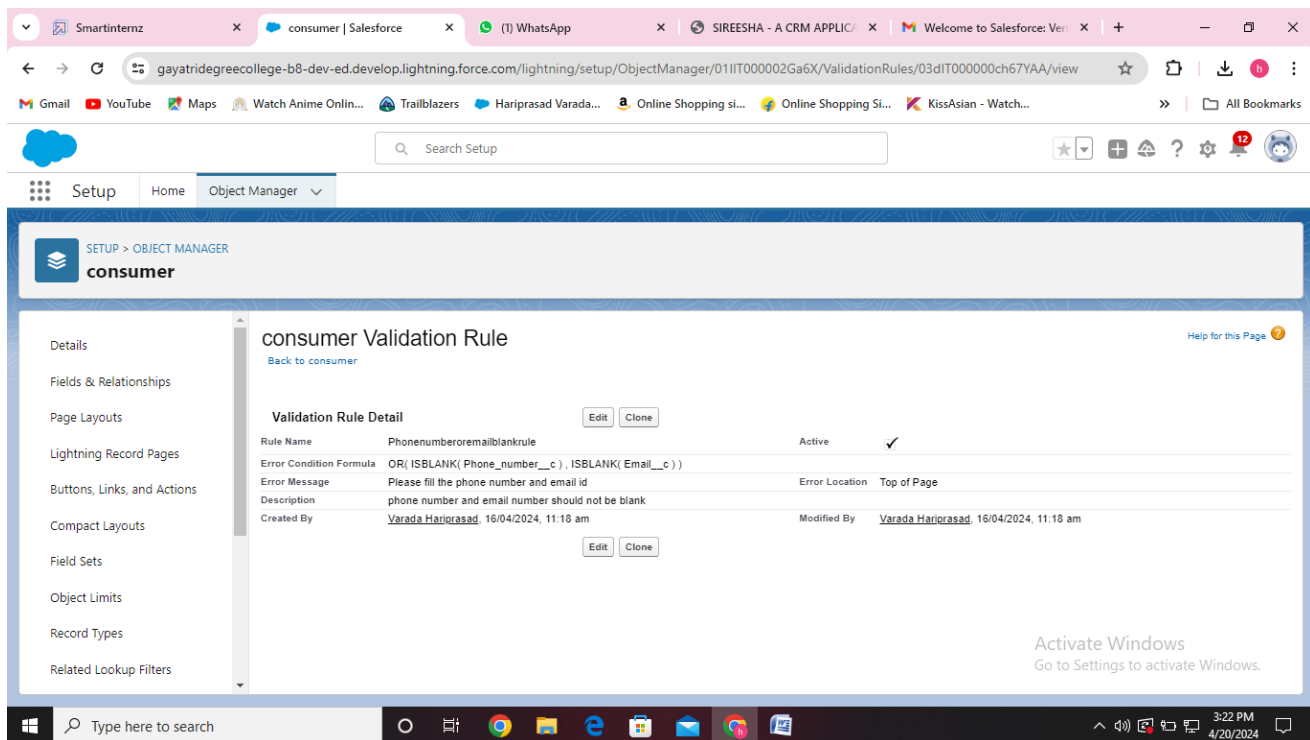
Milestone – 06 : Owner Profile To create a new profile:

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.
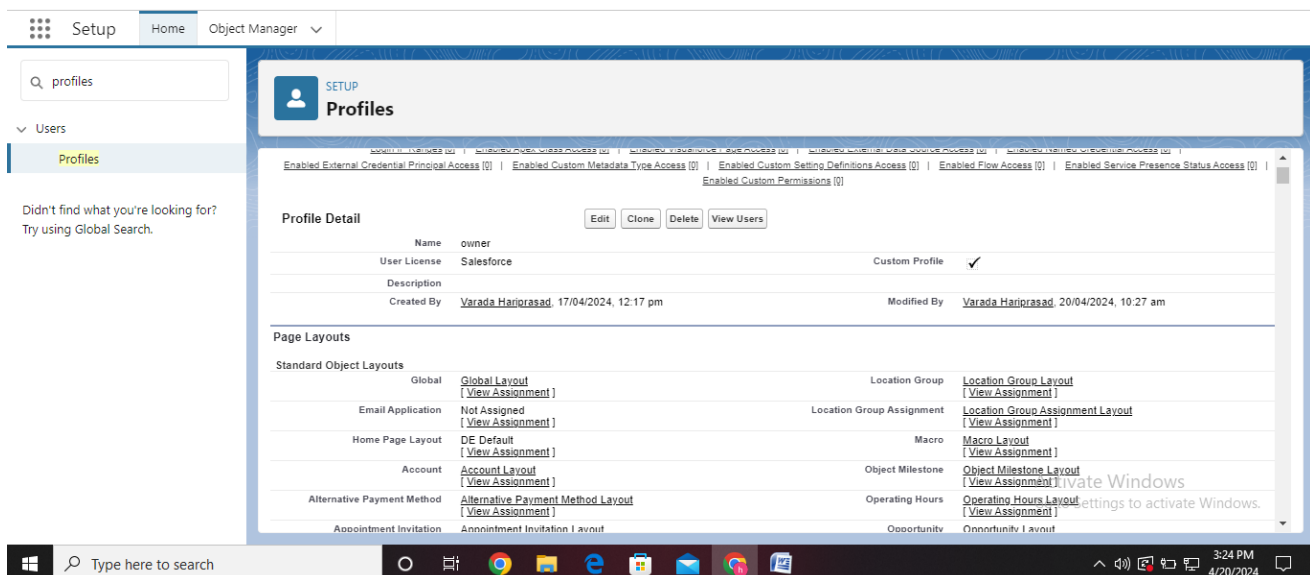
Agent Profile :

    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.
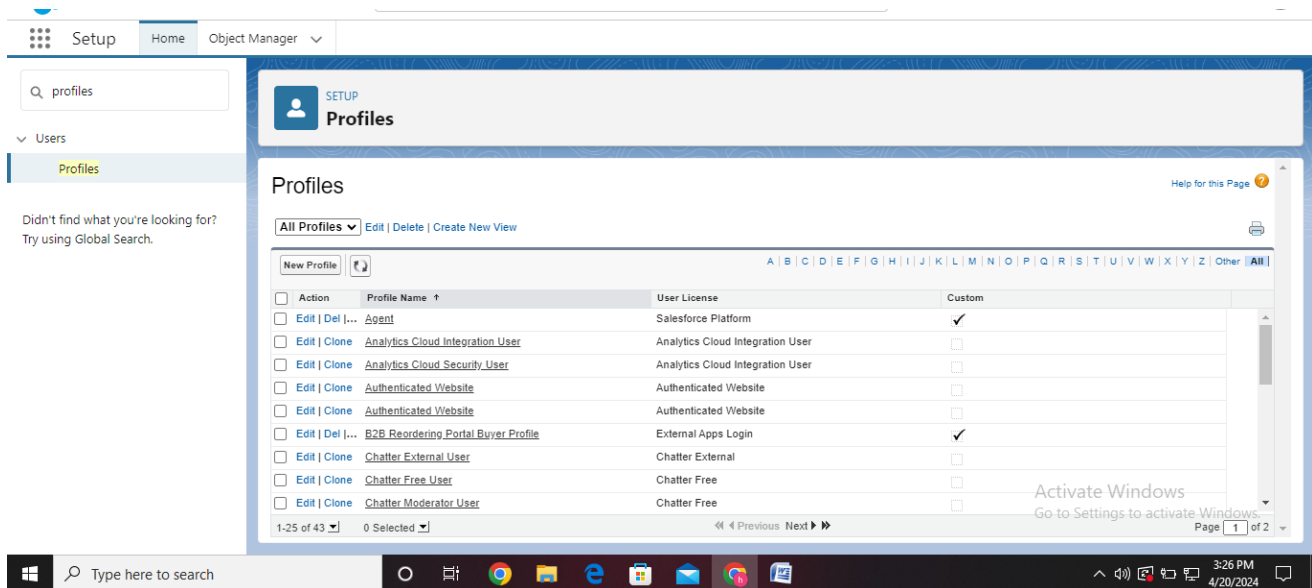
. Click and save it.

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.
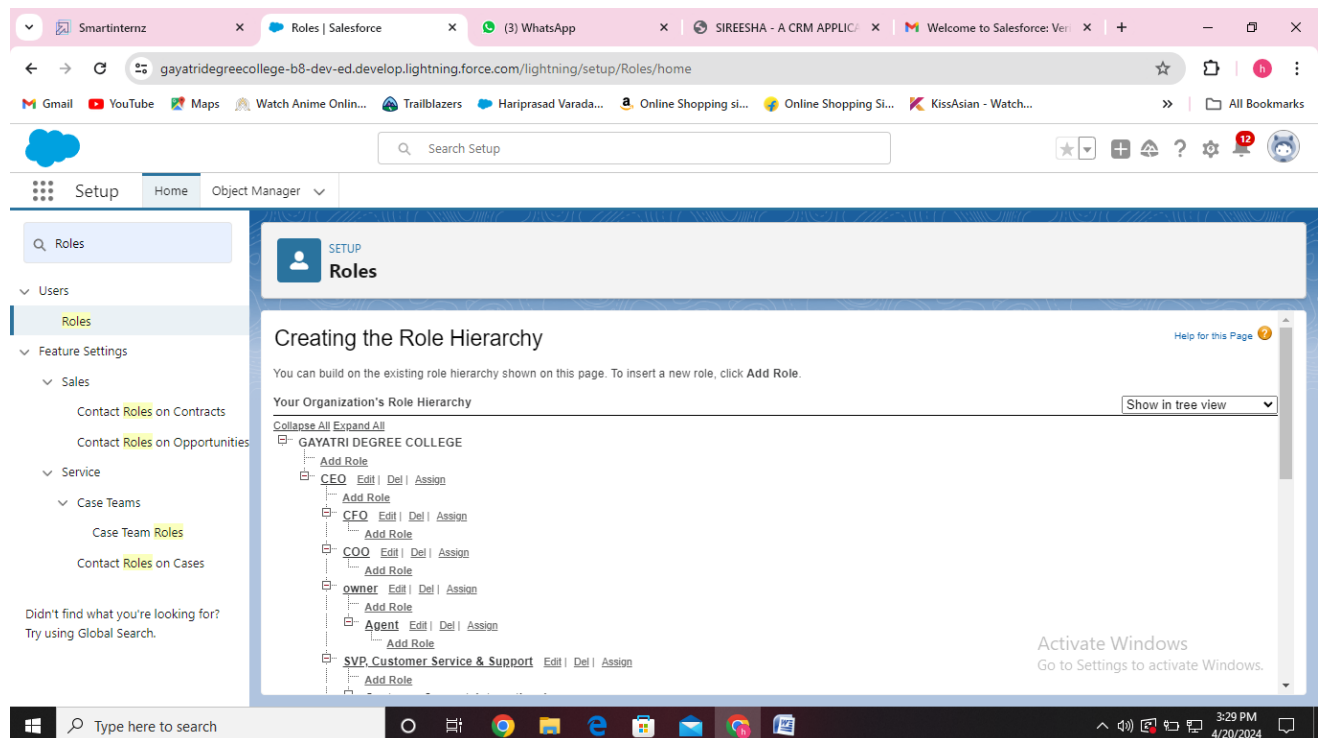
Milestone – 08 : Users Create User

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

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.

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. ollow 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.
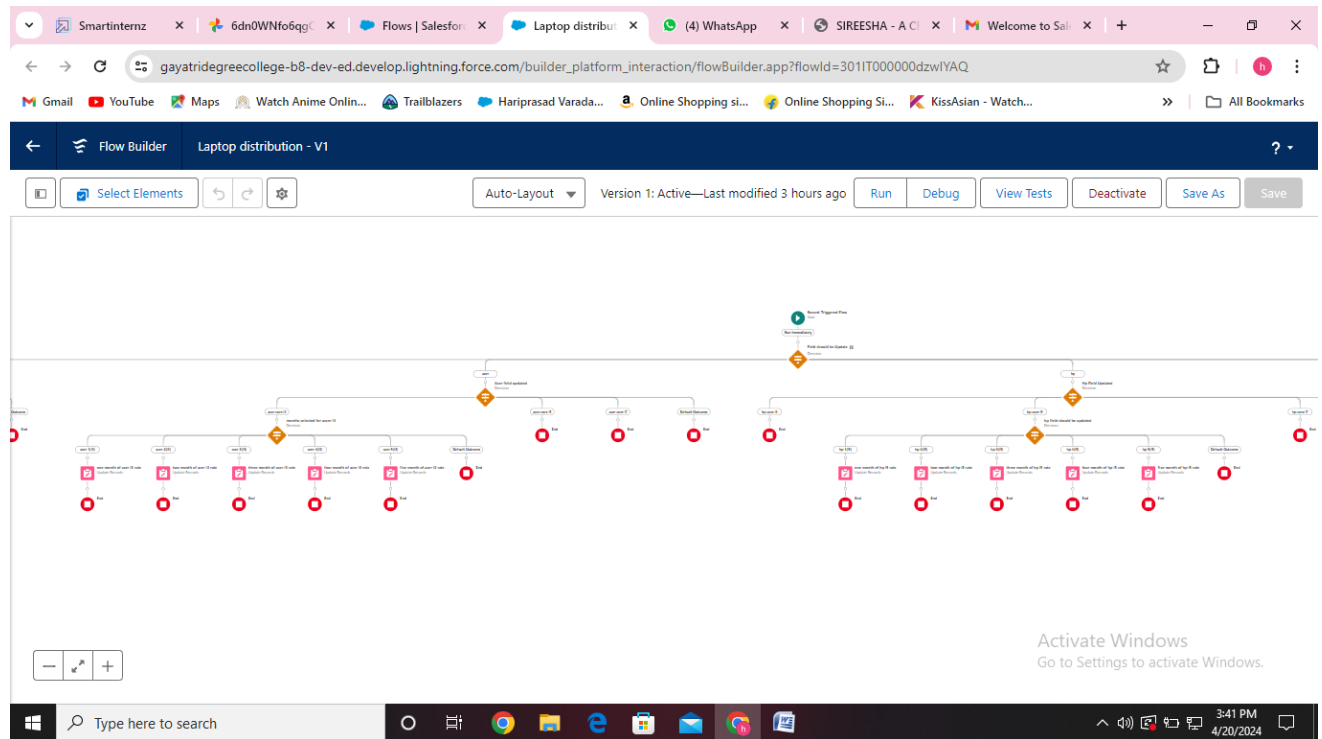
Milestone – 10 : Apex

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).
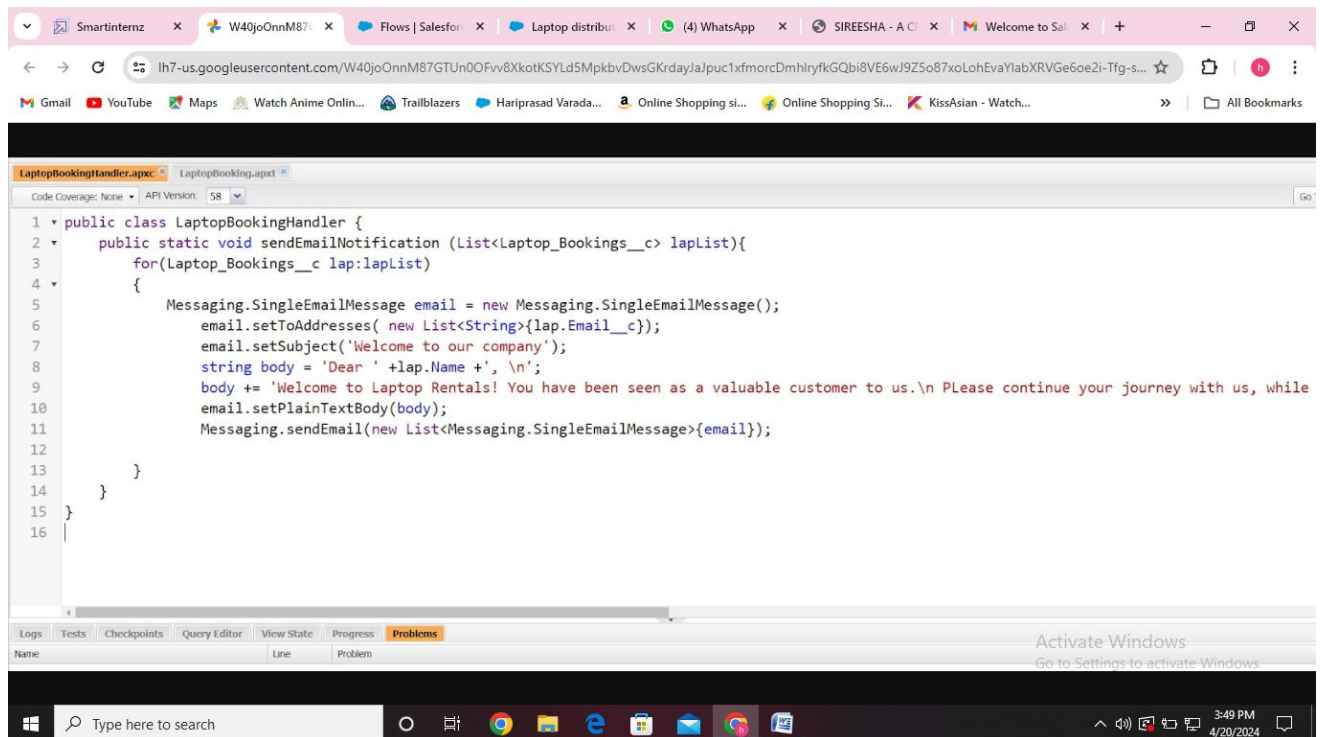
How to create a new trigger :

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);

  }

}
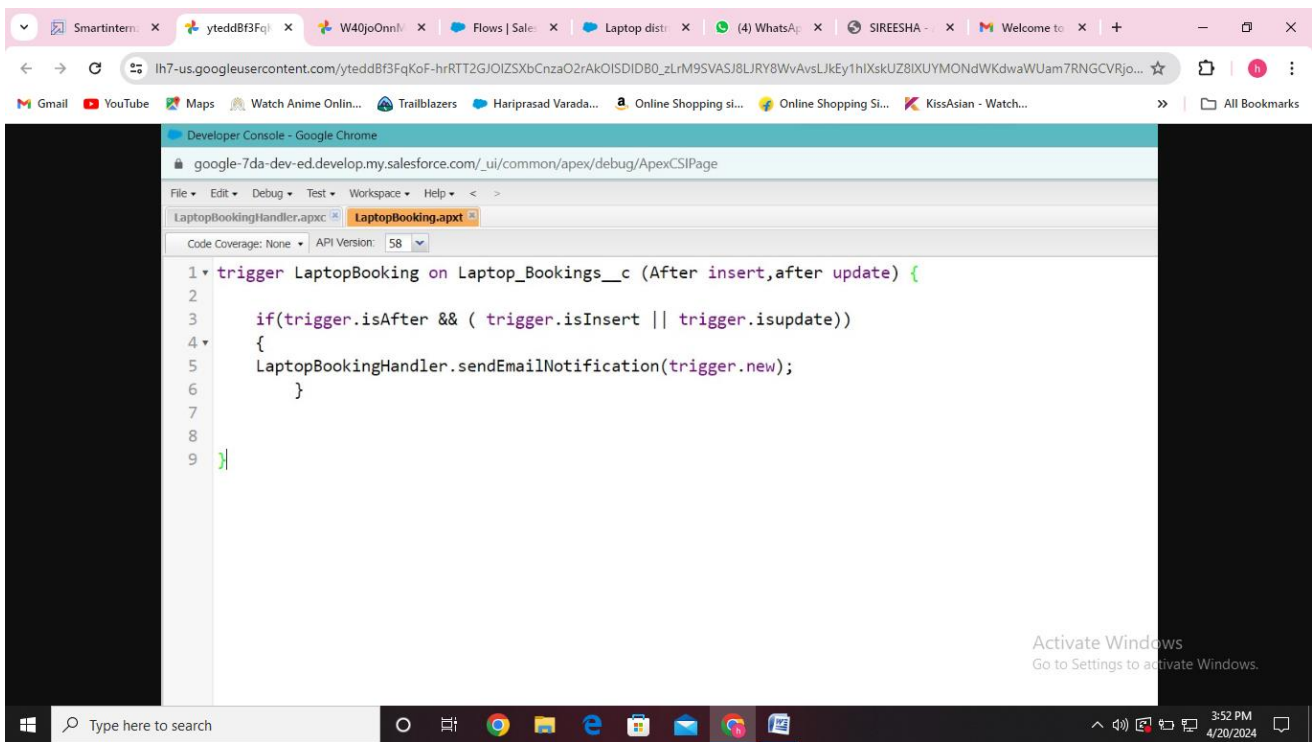
Milestone – 11 : Reports Create Report

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
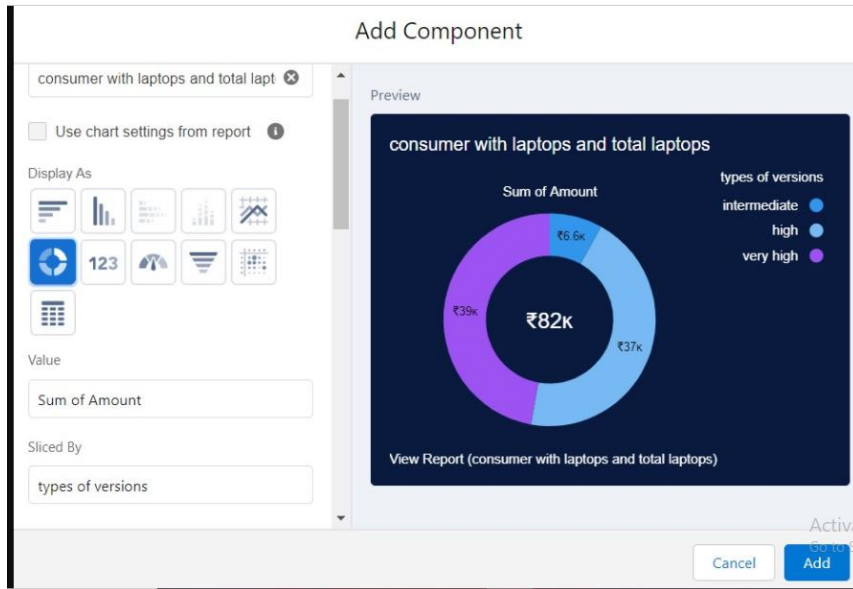
6. Click apply it.

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.
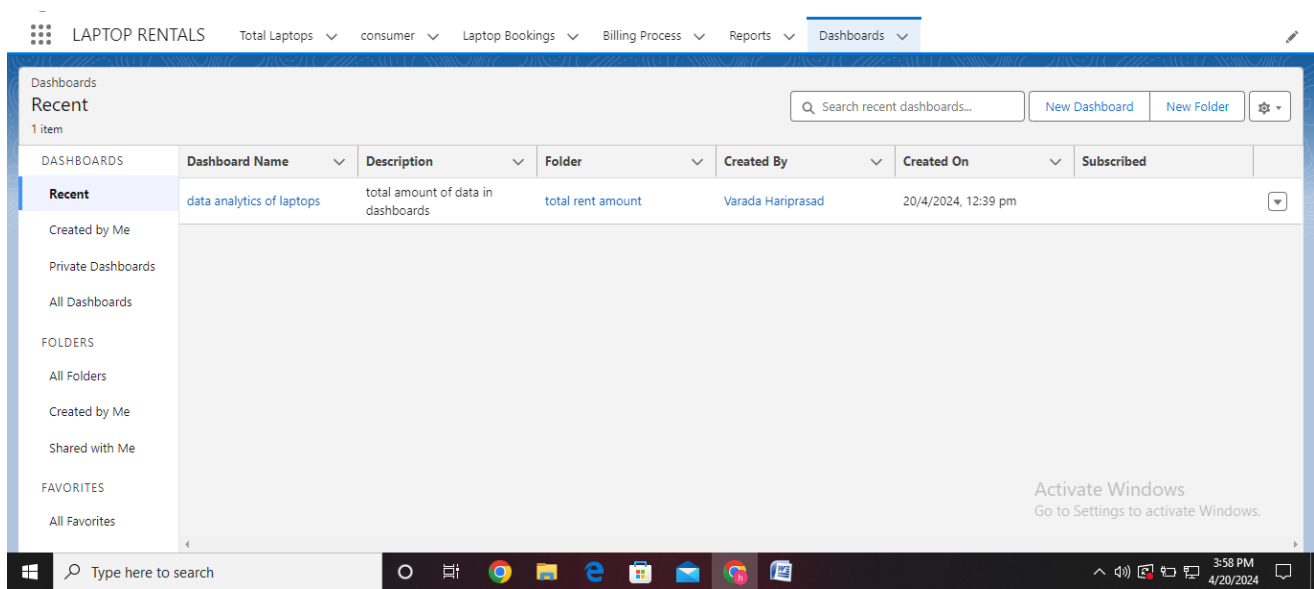
Create Dashboard

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