A CRM APPLICATION FOR LAPTOP RENTALS

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Abstract

The CRM Application for Laptop Rentals streamlines the rental process by efficiently delivering laptops to customers. It enhances customer engagement using advanced CRM strategies to improve experiences and optimize operations. A standout feature is personalized email communication with potential customers, fostering effective outreach. This solution ensures convenience, satisfaction, and operational excellence in the laptop rental industry.

Introduction

In the digital age, laptops have become essential tools for individuals and businesses. However, purchasing a laptop is not always feasible for everyone. The Laptop Rental System bridges this gap by providing a platform where users can rent laptops based on their requirements. Salesforce, being a leading cloud-based platform, offers the scalability, security, and customization needed for such an application.

Objectives

1. To develop a user-friendly platform for laptop rentals.
2. To enable efficient inventory and order management.
3. To integrate customer relationship management for better user engagement.
4. To provide real-time analytics and reports for business insights.
5. To ensure secure transactions and data handling.

Scope

The Laptop Rental System is designed to:

- Serve individual customers, small businesses, and corporate clients.
- Manage a wide range of laptop brands and configurations.

- Handle real-time availability and pricing updates.
- Support multiple payment gateways and rental plans.

Technologies Used

- **Salesforce:** Core platform for development.
- **Apex:** Custom logic and triggers.
- **Lightning Web Components (LWC):** Frontend components.
- **Salesforce Flow:** Automation of business processes.
- **Third-party APIs:** For payment and shipping integrations.
-

Object Creation

1) 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

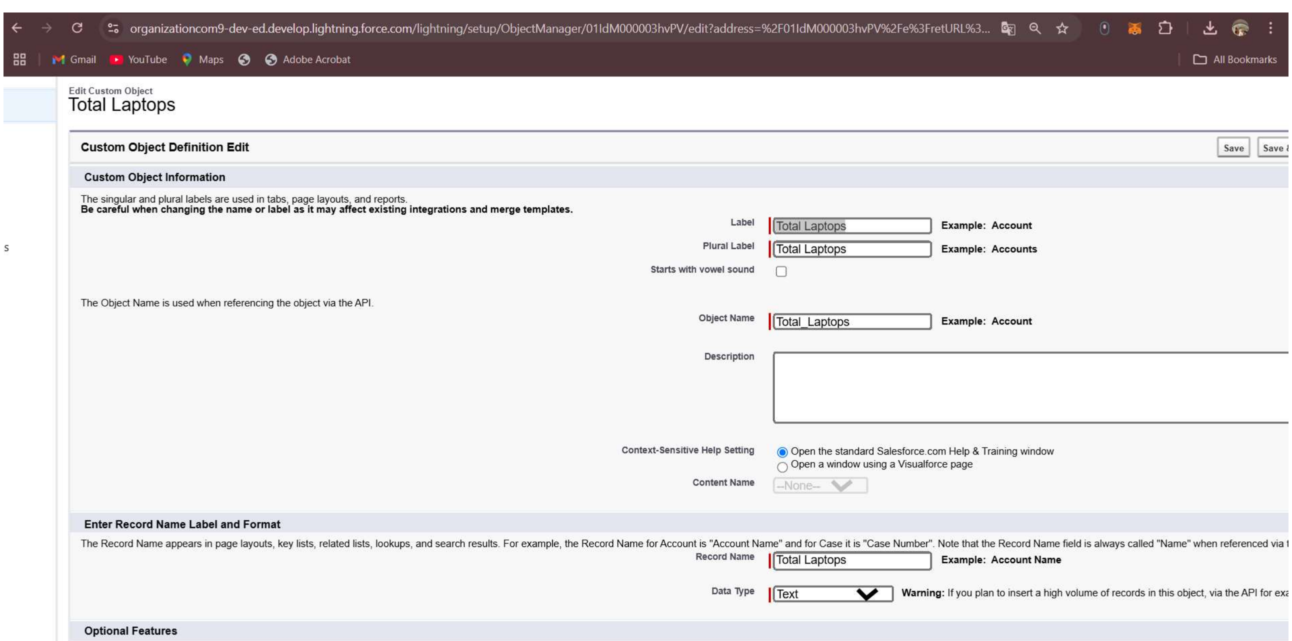
Plural label name>> Total Laptops

Enter 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.



2) Create consumer Object

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

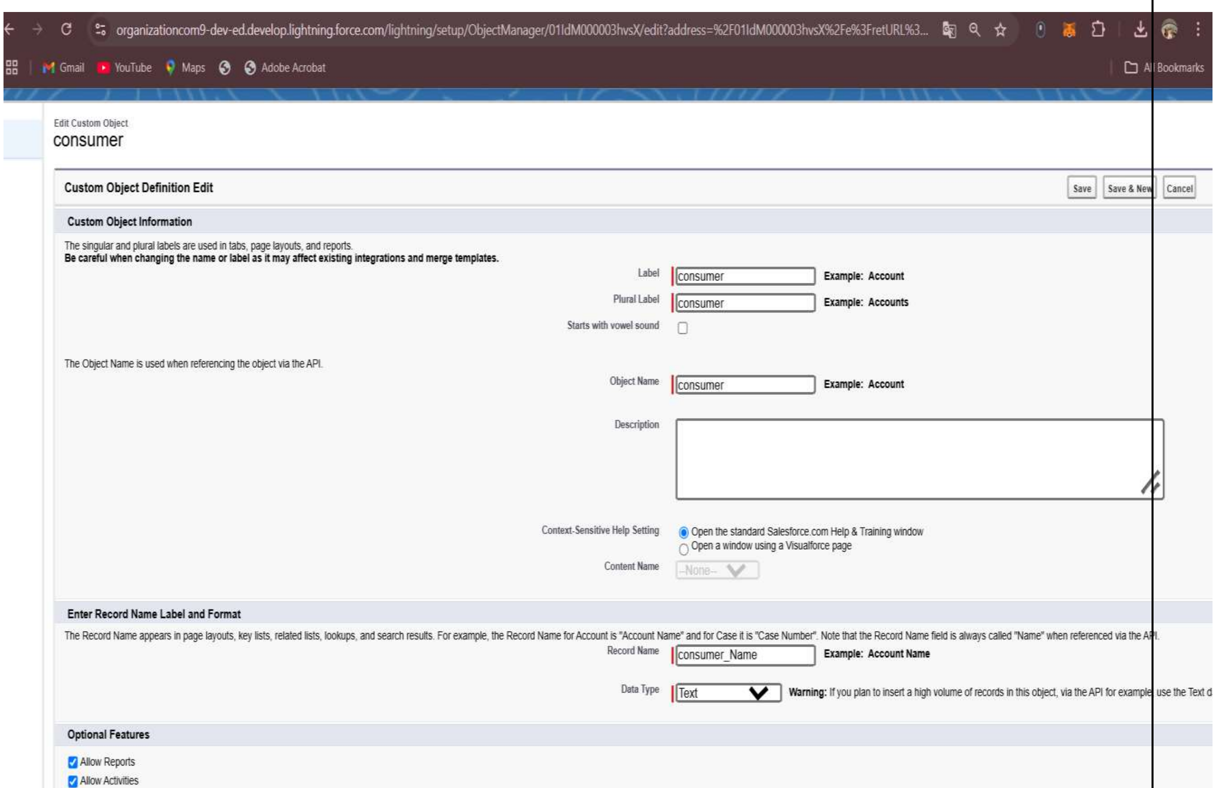
1) Enter the label name >> consumer

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.



3) Create Laptop Bookings Object

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

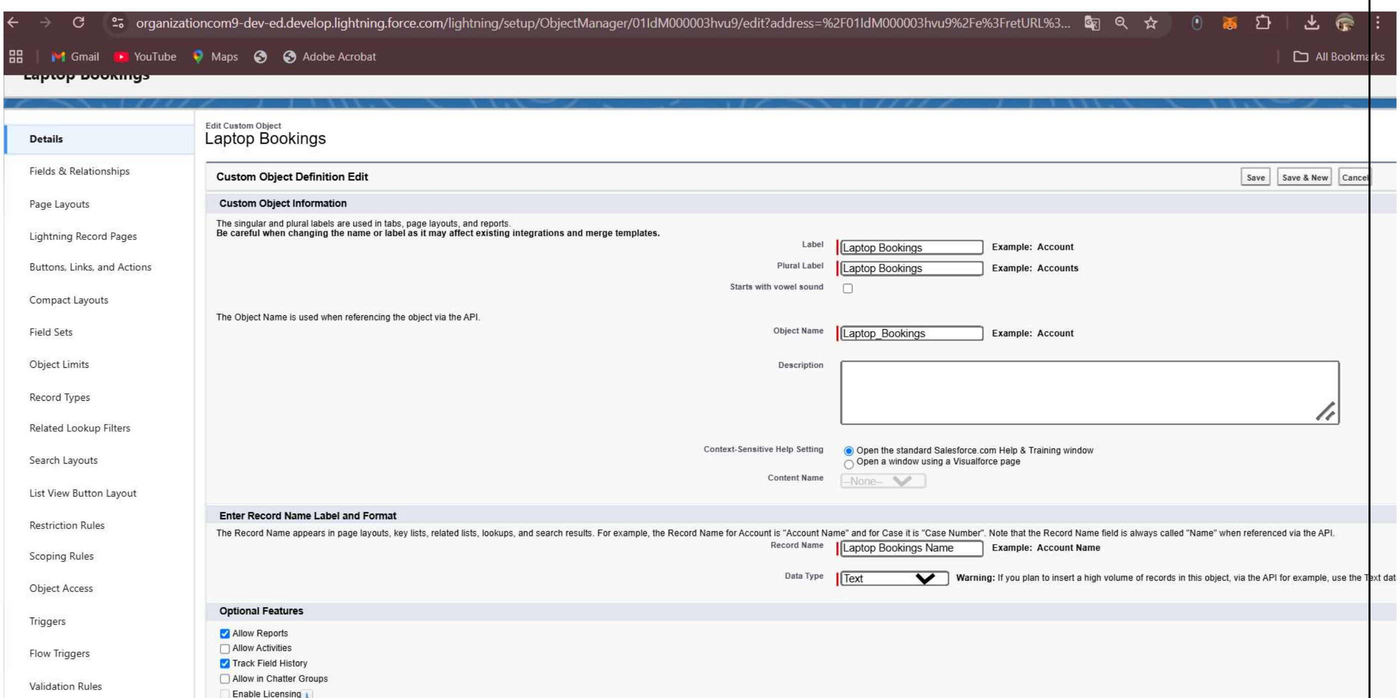
1) Enter the label name >> Laptop Bookings

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



4. 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

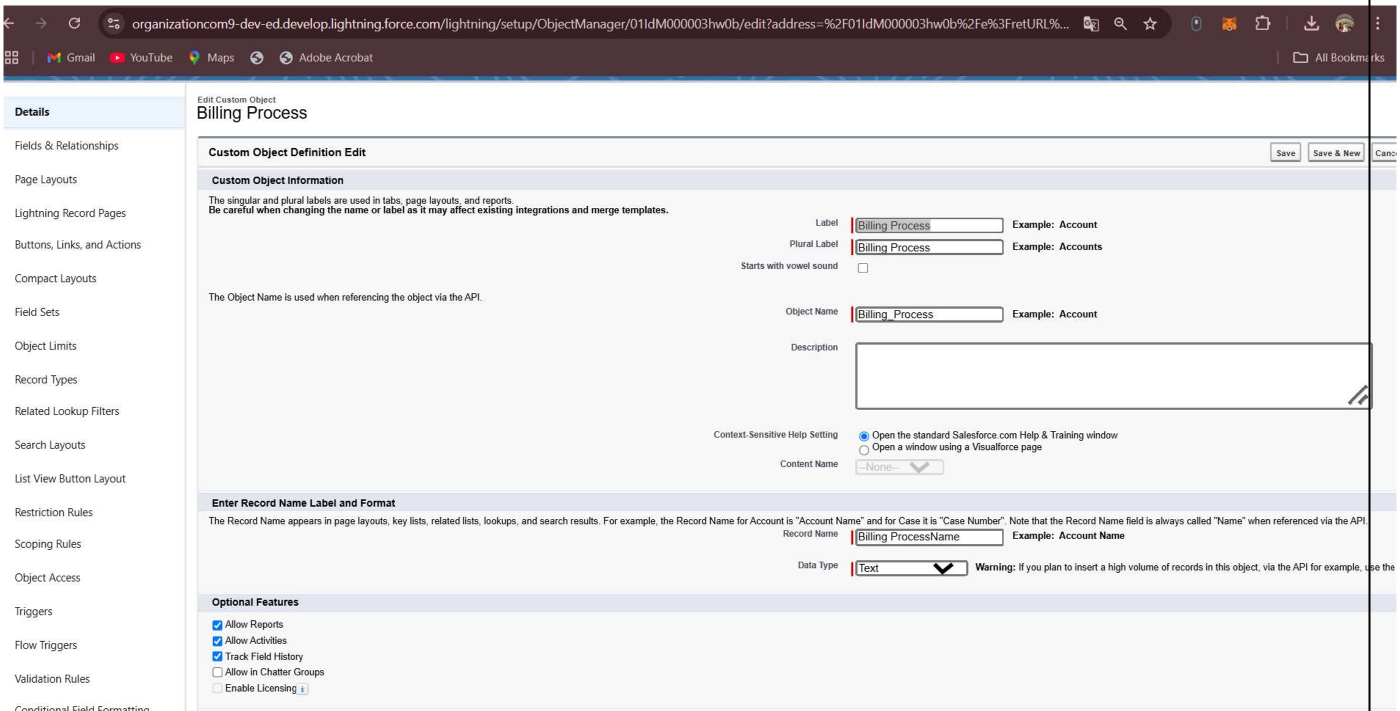
2) Plural label name >> Billing Process

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.

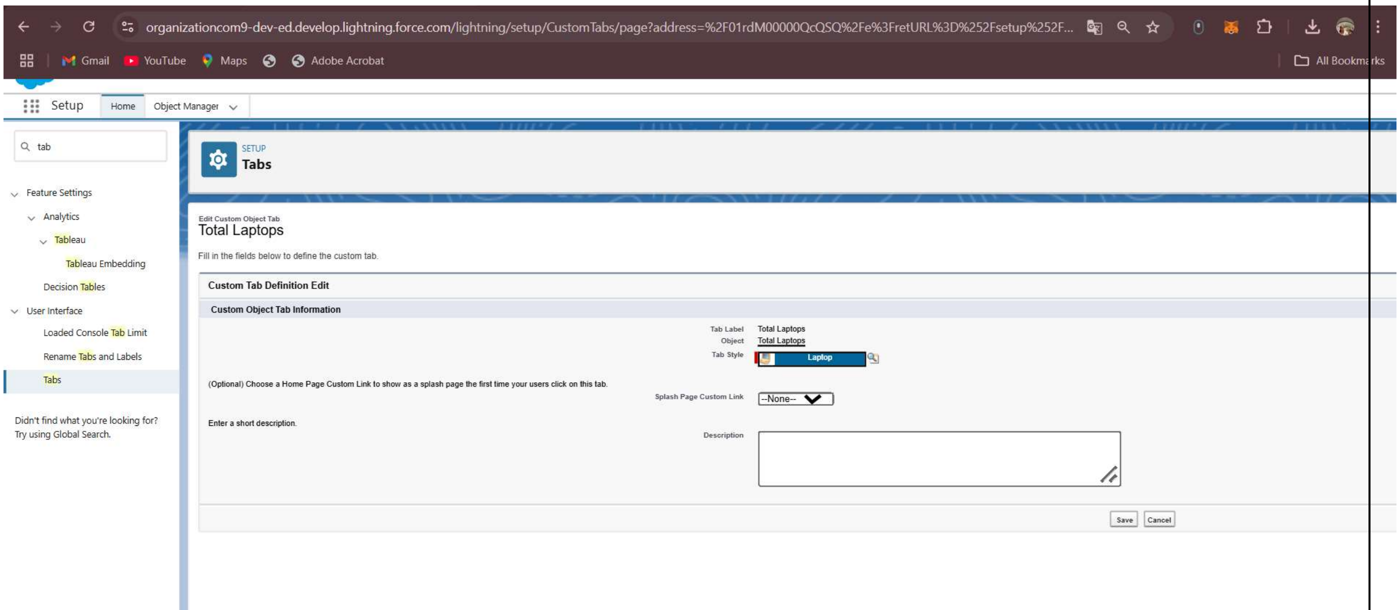


Tabs

1) Creating a Custom Tab To

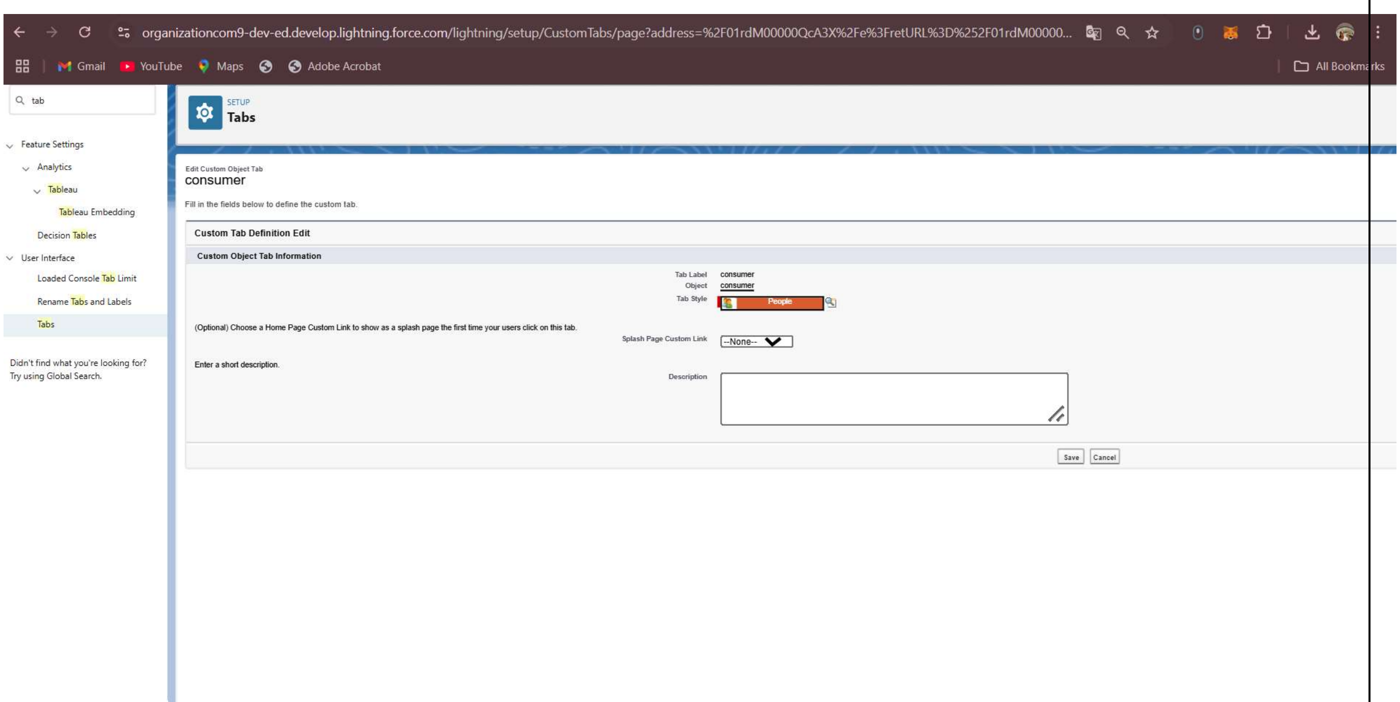
create a Tab: ( )

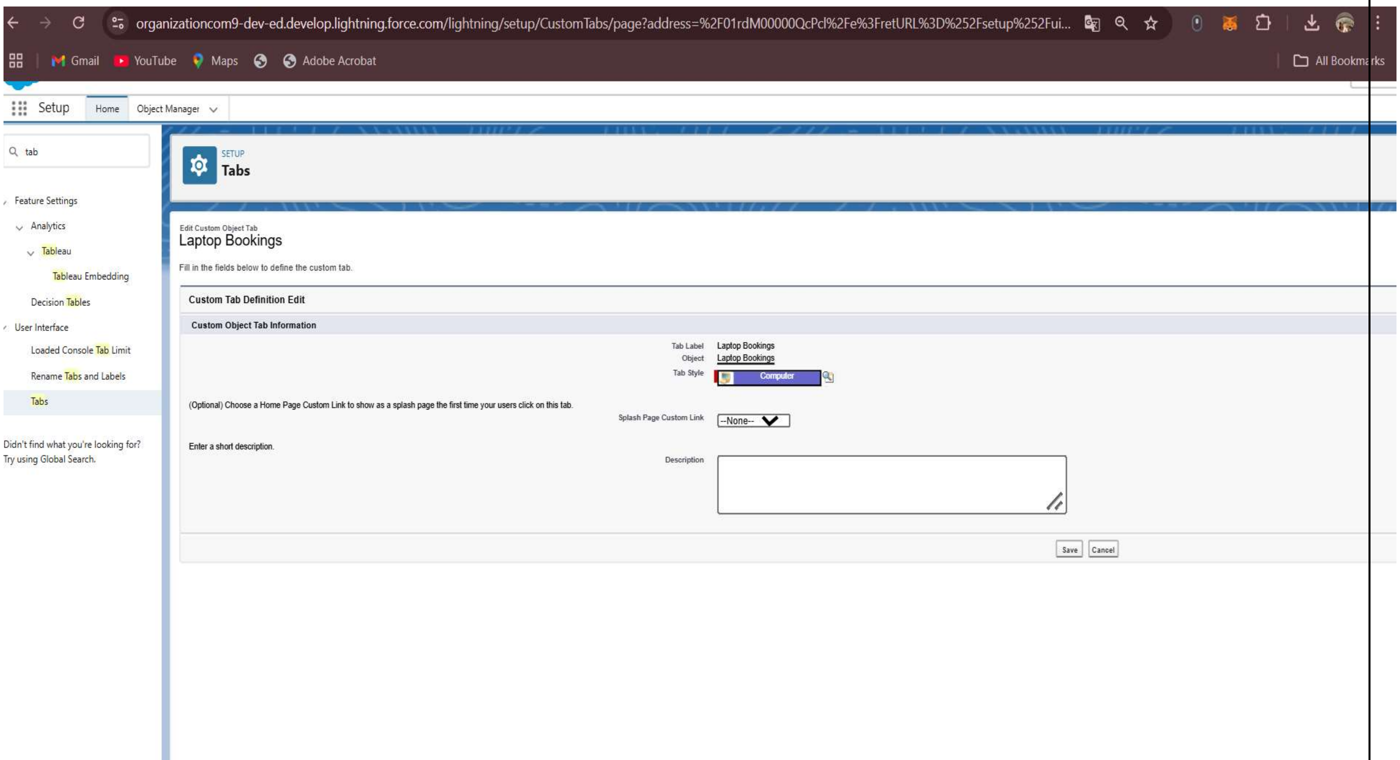
1) Go to setup page >> Type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)
2) Select Object(Total Laptops) >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) uncheck the include tab .
3) Make sure that the Append tab to users'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

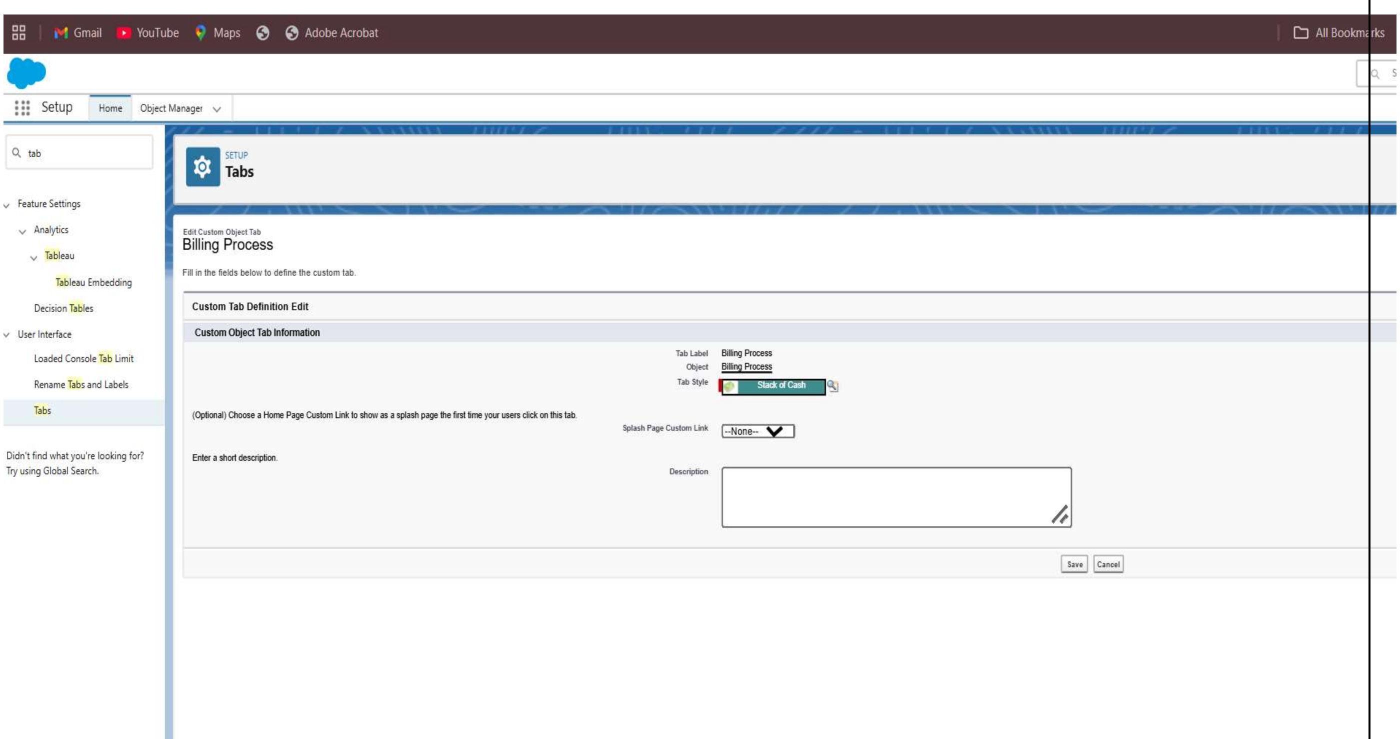


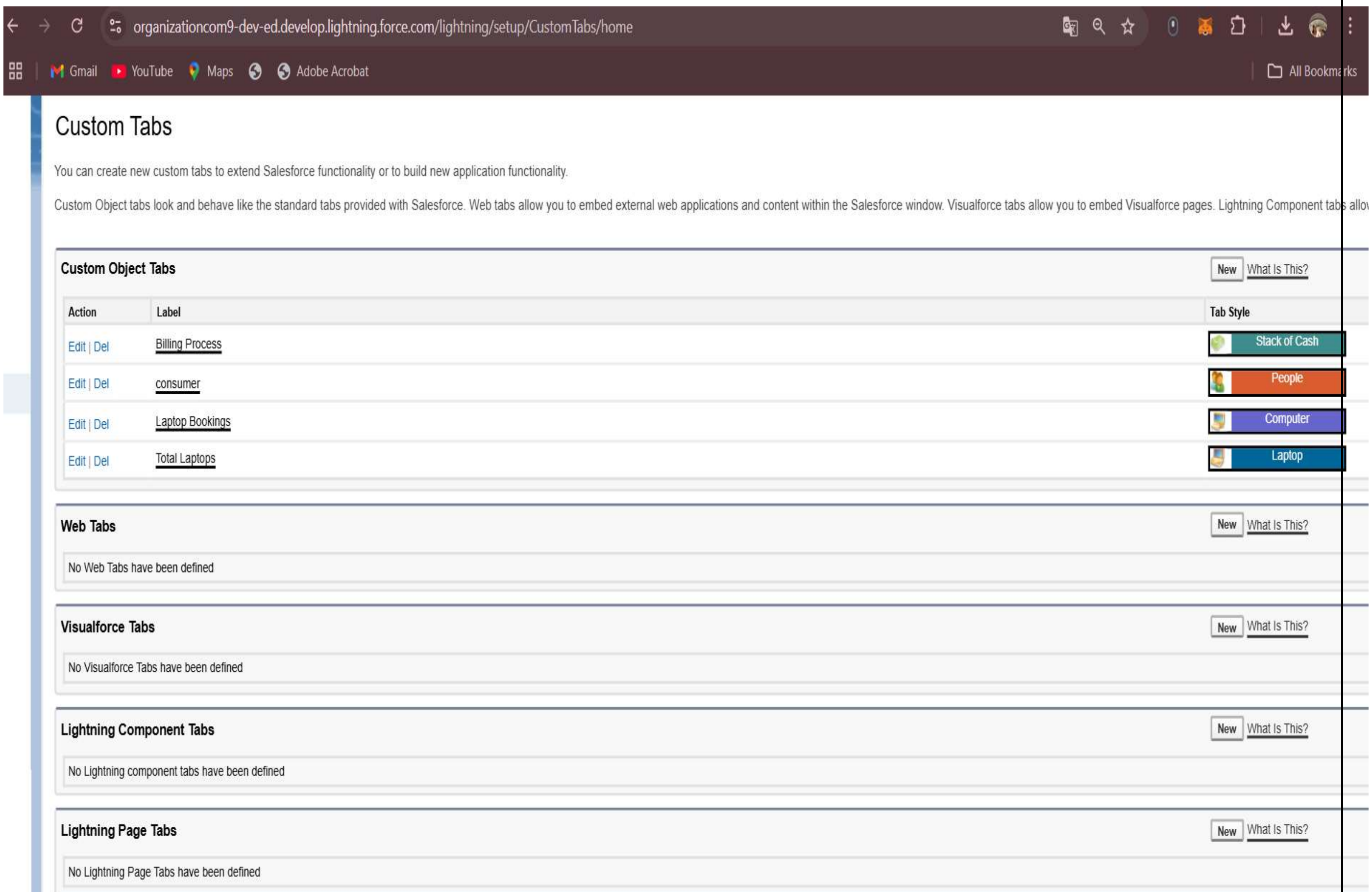
Activity 2: Creating Remaining Tabs

1. Now create the Tabs for the remaining Objects, they are "consumer,Laptop Booking,Billing process".
2. Follow the same steps as mentioned in Activity -1 .




organizationcom9-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2F01rdM00000QcPcl%2Fe%3FretURL%3D%252Fsetup%252Fui...
Gmail
YouTube
Maps
Adobe Acrobat
All Bookmarks
Setup
Home
Object Manager
tab
SETUP
Tabs
Feature Settings
Analytics
Tableau
Tableau Embedding
Decision Tables
User Interface
Loaded Console Tab Limit
Rename Tabs and Labels
Tabs
Didn't find what you're looking for? Try using Global Search.
Edit Custom Object Tab
Laptop Bookings
Fill in the fields below to define the custom tab.
Custom Tab Definition Edit
Custom Object Tab Information
Tab Label Laptop Bookings
Object Laptop Bookings
Tab Style Computer
(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.
Splash Page Custom Link --None--
Enter a short description.
Description
Save
Cancel


Gmail
YouTube
Maps
Adobe Acrobat
All Bookmarks
Setup
Home
Object Manager
tab
SETUP
Tabs
Feature Settings
Analytics
Tableau
Tableau Embedding
Decision Tables
User Interface
Loaded Console Tab Limit
Rename Tabs and Labels
Tabs
Didn't find what you're looking for? Try using Global Search.
Edit Custom Object Tab
Billing Process
Fill in the fields below to define the custom tab.
Custom Tab Definition Edit
Custom Object Tab Information
Tab Label Billing Process
Object Billing Process
Tab Style Stack of Cash
(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.
Splash Page Custom Link --None--
Enter a short description.
Description
Save
Cancel



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.

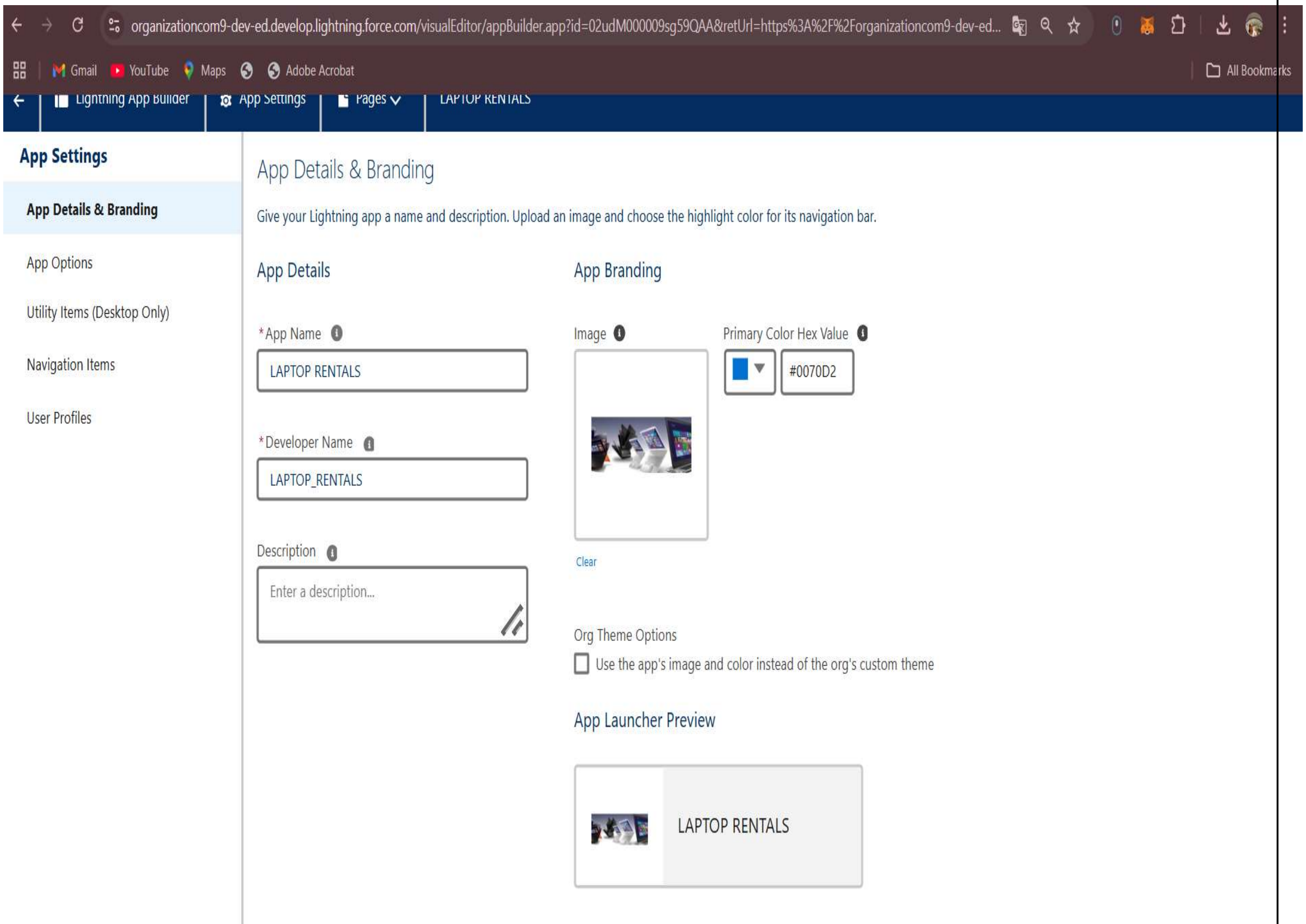
2. Fill the app name in app details as LAPTOP RENTALS >>Next >> (App option page) keep it as default >> Next >> (Utility Items) keep it as default >> Next.

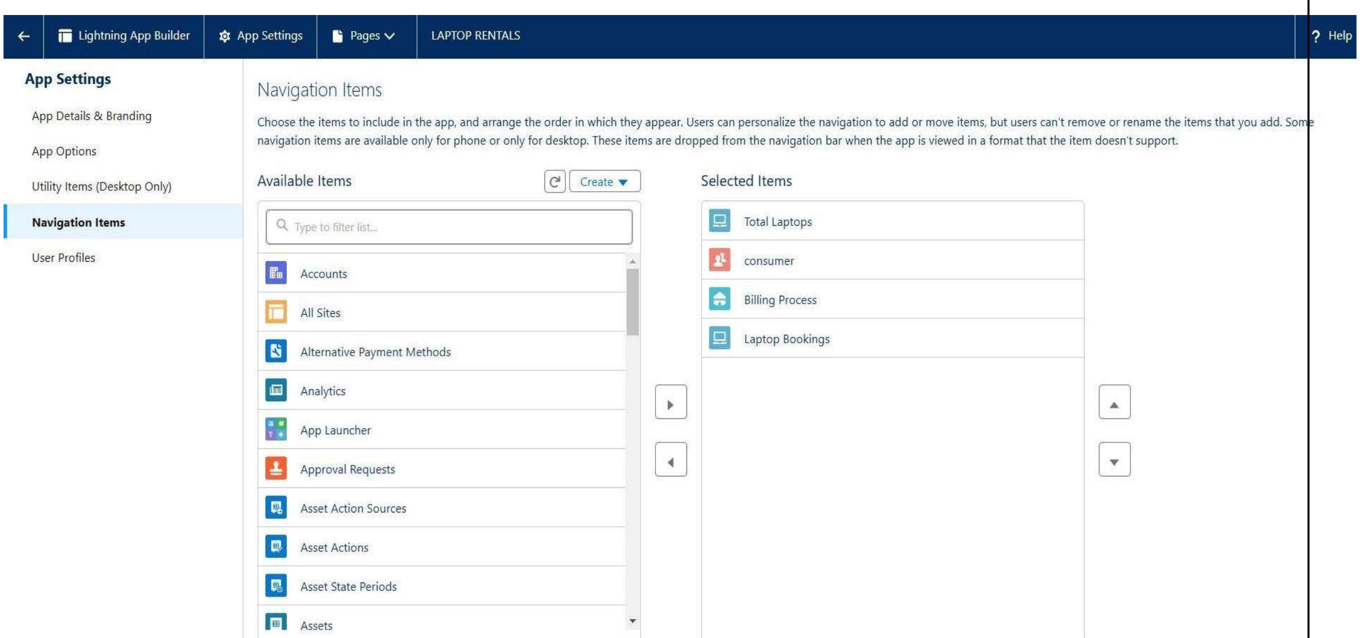
3. Upload a photo that is related to your app.
4. To Add Navigation Items:

Select the items (Total Laptops,consumer,Laptop Booking,Billing Process) from the search bar and move it using the arrow button >> Next.

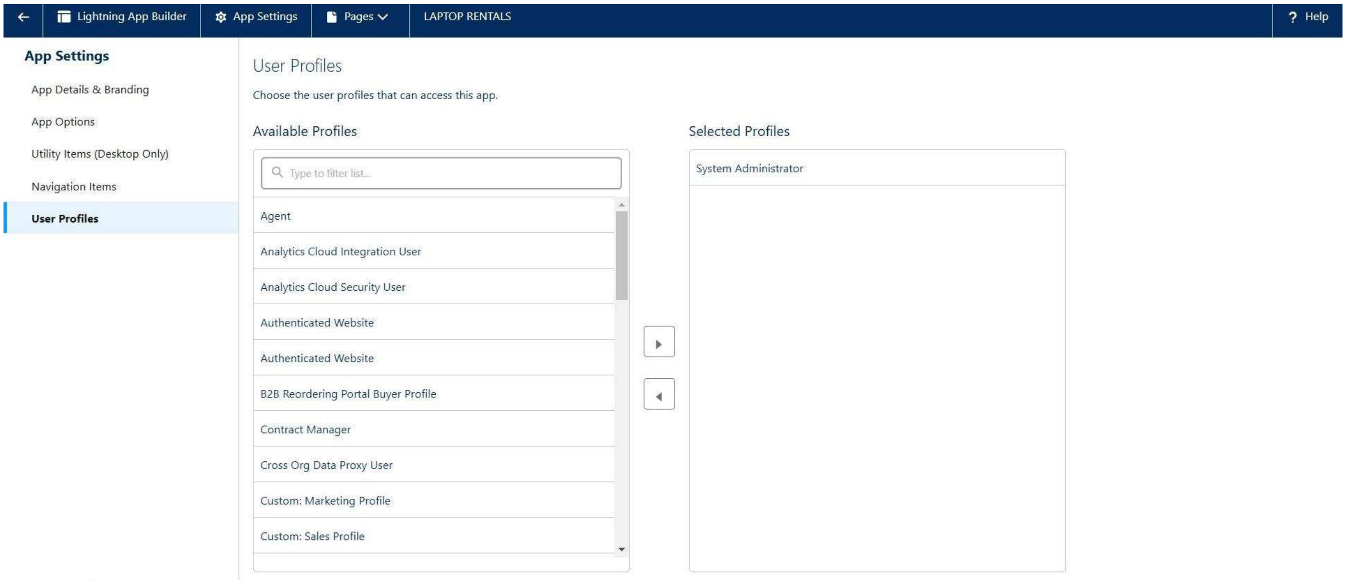
5. To Add User Profiles:

Search profiles (System administrator) in the search bar >> click on the arrow button >> save & finish.


organizationcom9-dev-ed.develop.lightning.force.com/visualEditor/appBuilder.app?id=02udM000009sg59QAA&retUrl=https%3A%2F%2Forganizationcom9-dev-ed...
Gmail
YouTube
Maps
Adobe Acrobat
All Bookmarks
Lightning App Builder
App Settings
Pages
LAPTOP RENTALS
App Settings
App Details & Branding
App Options
Utility Items (Desktop Only)
Navigation Items
User Profiles
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
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
LAPTOP RENTALS


Lightning App Builder
App Settings
Pages
LAPTOP RENTALS
Help
App Settings
App Details & Branding
App Options
Utility Items (Desktop Only)
Navigation Items
User Profiles
Navigation Items
Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.
Available Items
Create
Type to filter list...
Accounts
All Sites
Alternative Payment Methods
Analytics
App Launcher
Approval Requests
Asset Action Sources
Asset Actions
Asset State Periods
Assets
Selected Items
Total Laptops
consumer
Billing Process
Laptop Bookings

- Move system administrator from left to right:



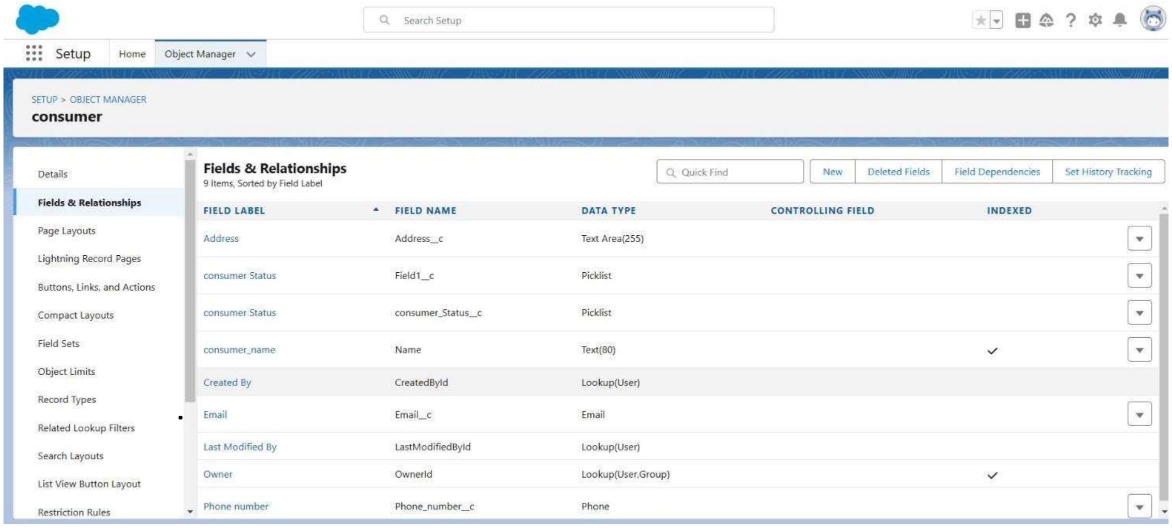
Fields

1) Creating the field in consumer object

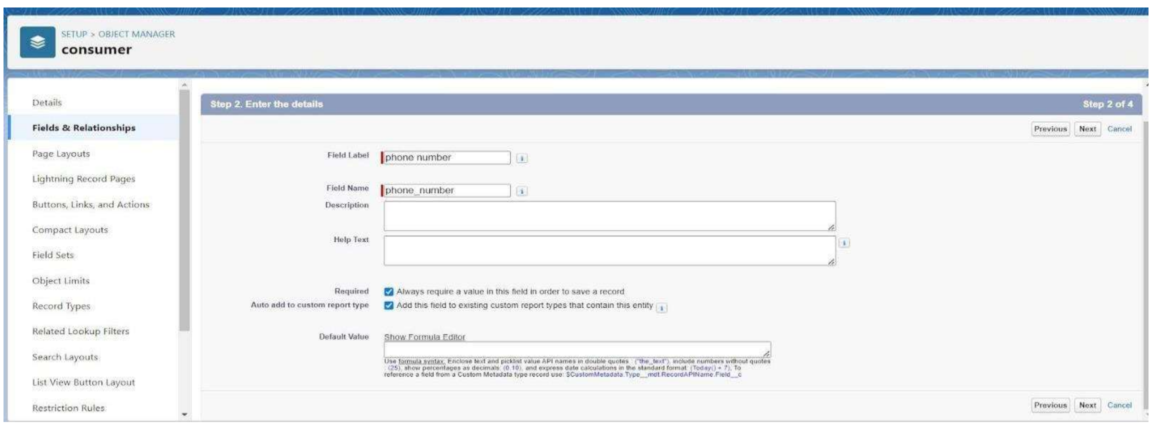
To create fields in an object:

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:

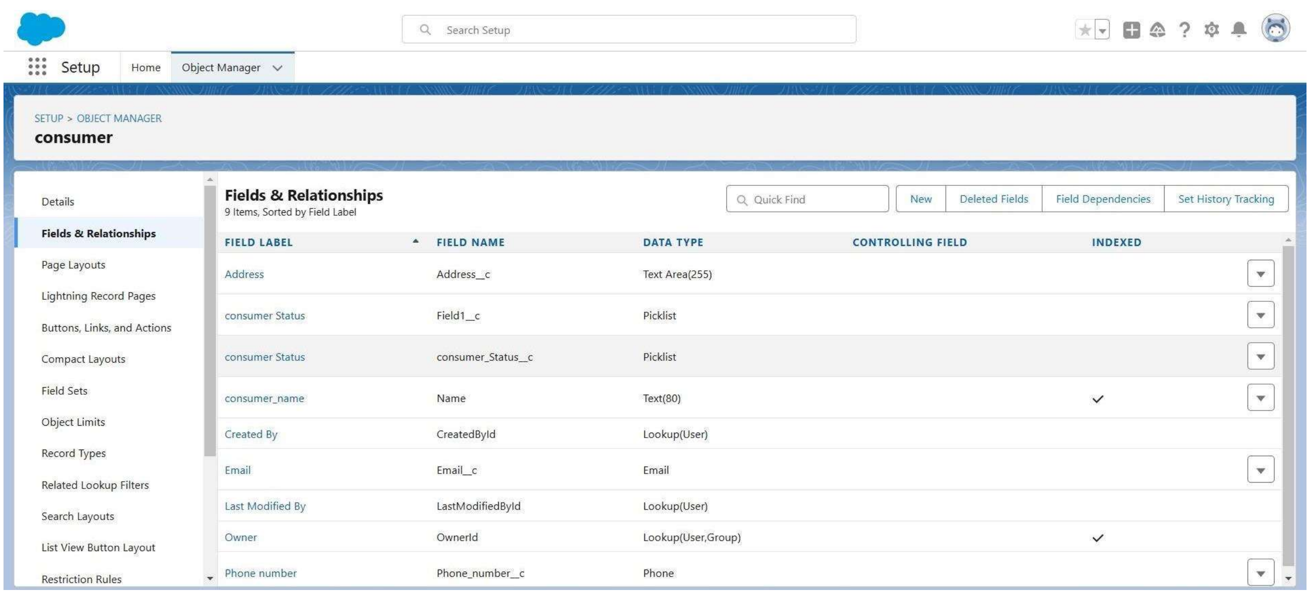
- Field Label: Phone number
- Field Name : gets auto generated
- Click the required option checkbox.
- Click on Next >> Next >> Save and new.



Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
consumer
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
Fields & Relationships
9 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
Field1__c
Picklist
consumer Status
consumer_Status__c
Picklist
consumer_name
Name
Text(80)
Created By
CreatedById
Lookup(User)
Email
Email__c
Email
Last Modified By
LastModifiedById
Lookup(User)
Owner
OwnerId
Lookup(User,Group)
Phone number
Phone_number__c
Phone



SETUP > OBJECT MANAGER
consumer
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
Step 2. Enter the details
Step 2 of 4
Previous
Next
Cancel
Field Label
phone number
Field Name
phone_number
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
Previous
Next
Cancel



Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
consumer
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
Fields & Relationships
9 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
Field1__c
Picklist
consumer Status
consumer_Status__c
Picklist
consumer_name
Name
Text(80)
Created By
CreatedById
Lookup(User)
Email
Email__c
Email
Last Modified By
LastModifiedById
Lookup(User)
Owner
OwnerId
Lookup(User,Group)
Phone number
Phone_number__c
Phone

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

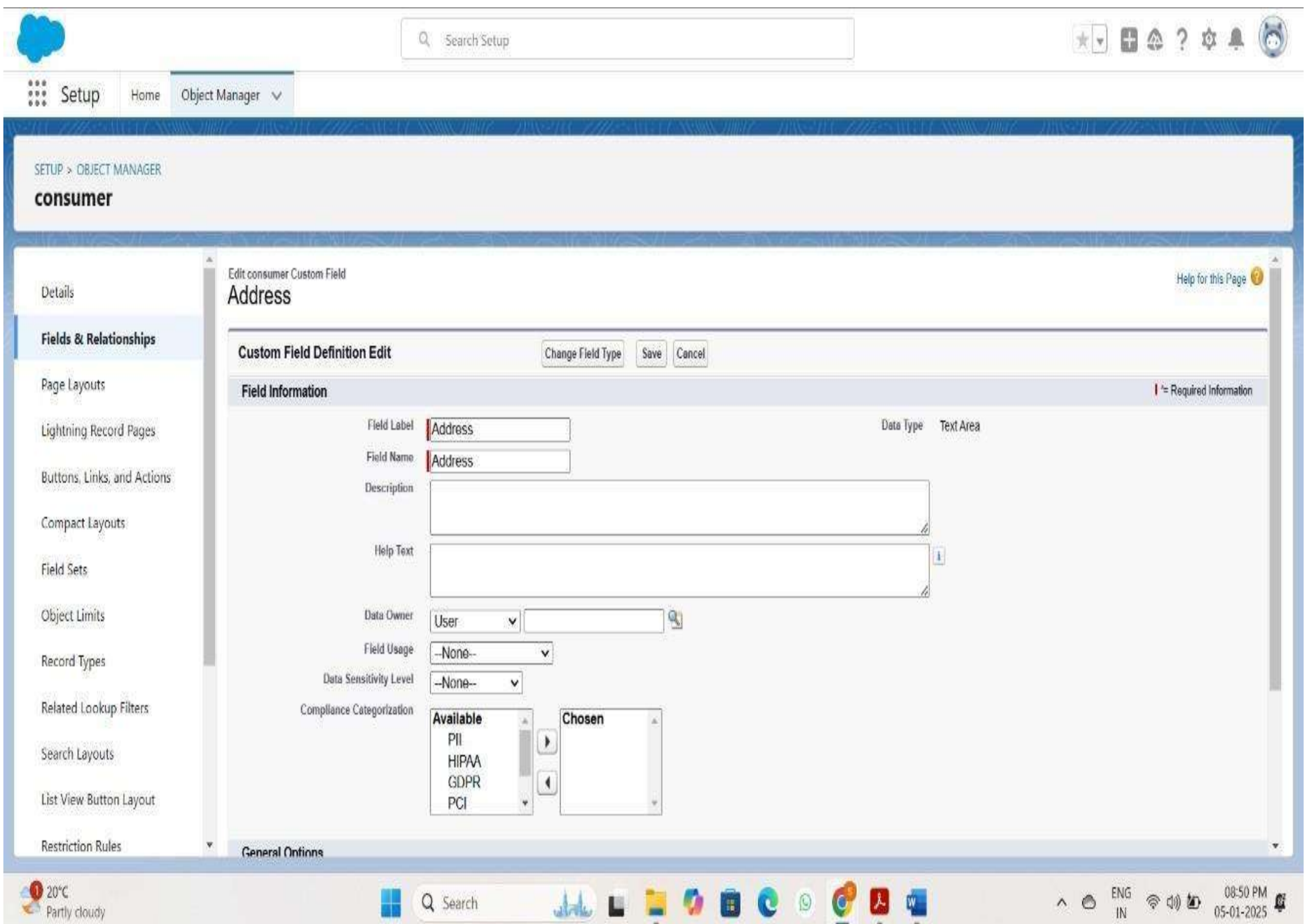
Now click on “Fields & Relationships” >> New
Select Data type as a “Email” and Click on Next Fill the Above as following:

- Field Label: Email
- Field Name :It’s gets auto generated
- Click on Next >> Next >> Save and new.

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 a “Text Area” and Click on Next
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.



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

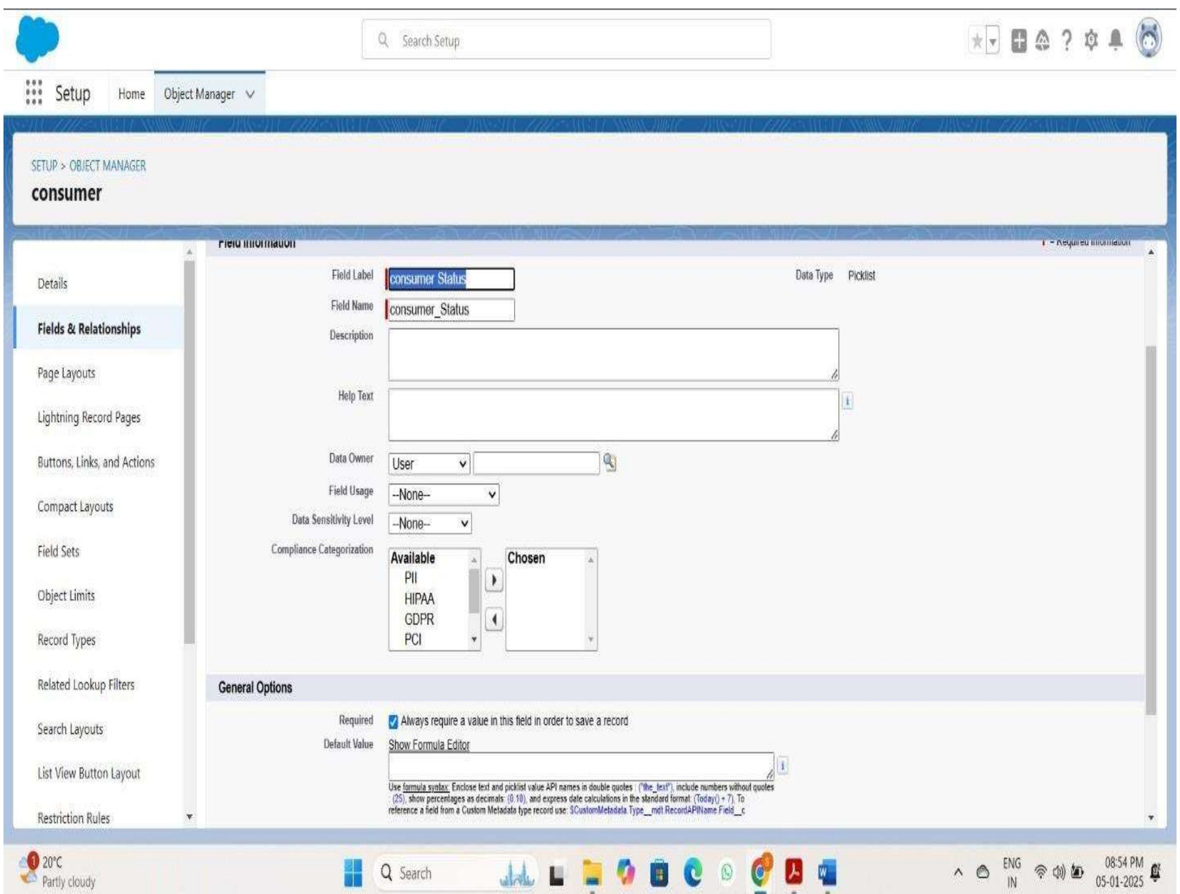
Now click on “Fields & Relationships” >> New

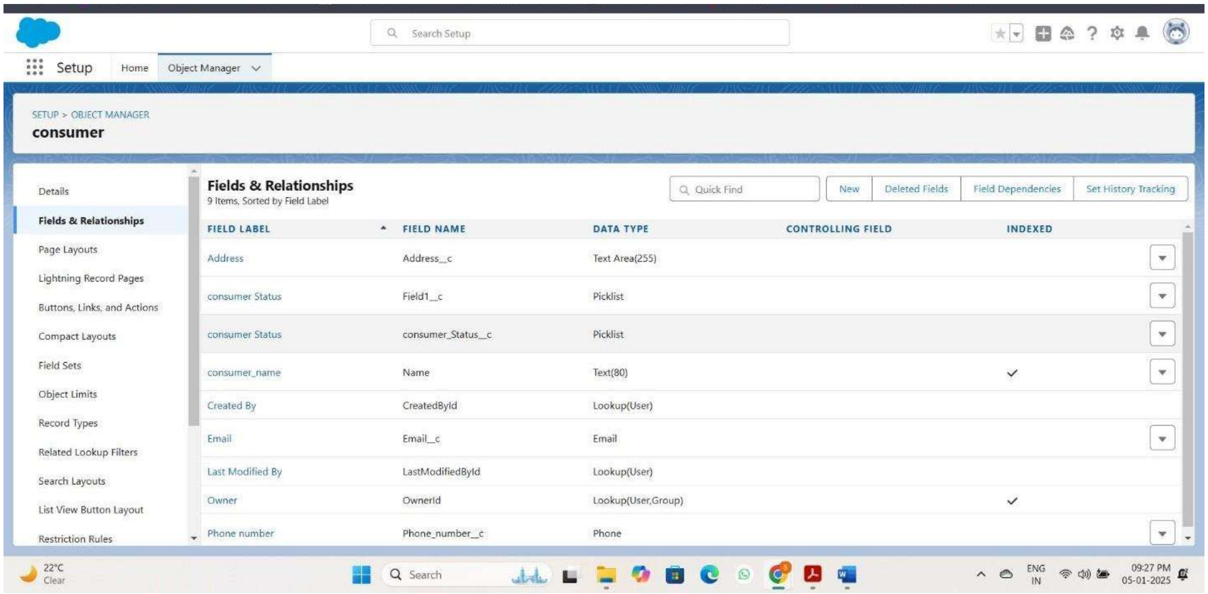
Select Data type as a “Picklist” and Click on Next Fill the Above as following:

- Field Label: consumer Status
- Value - Select enter values with each value separated by a new line

  1. Student
  2. Employee
  3. Others

- Select required
- Field Name : It’s gets auto generated •
- Click on Next >> Next >>
- Save and new.

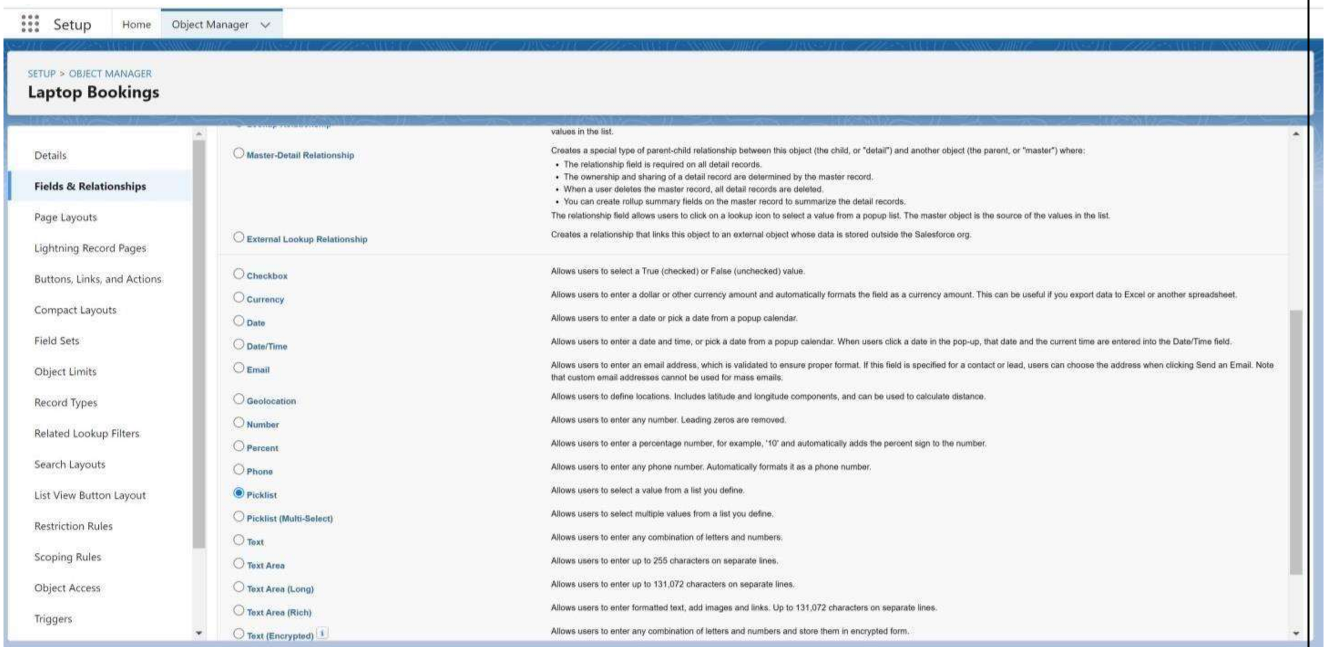


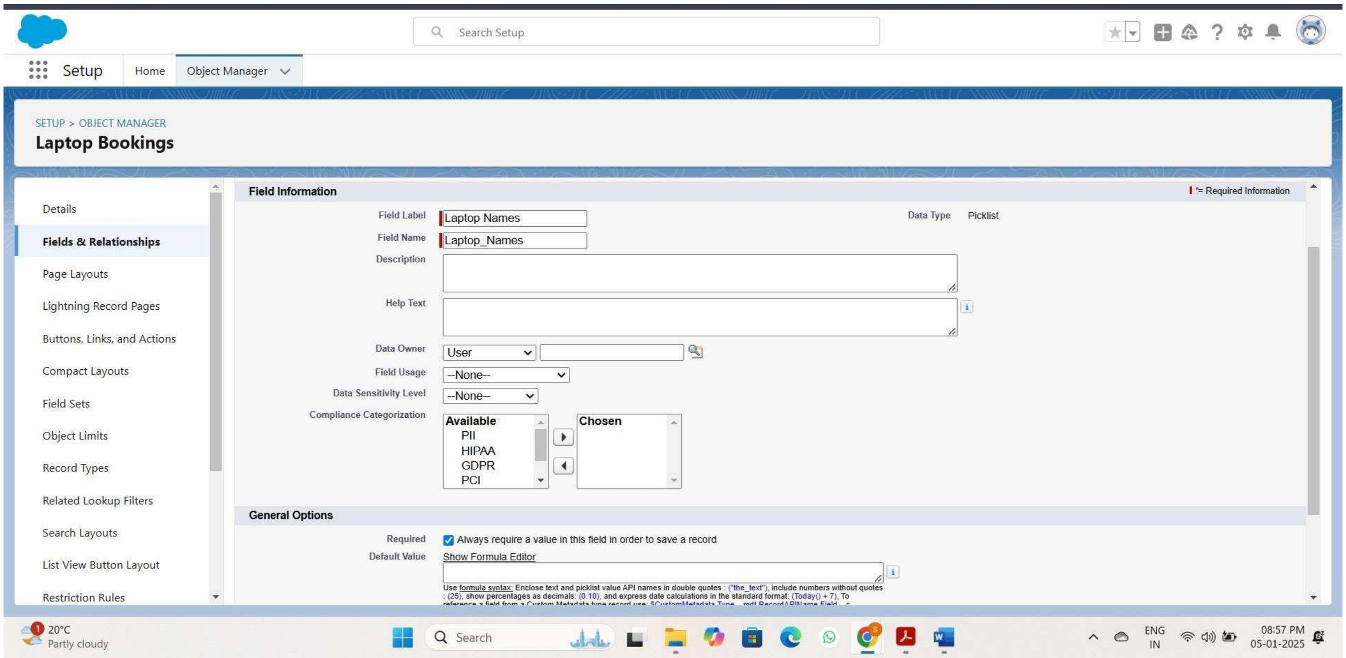


Creating the field in Laptops Bookings object

1. 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. Label: Laptop Names
5. Picklist values are:-1.Dell 2. Acer 3.Hp 4.Mac
6. Select required
7. Click on Next >> Next >> Save and new

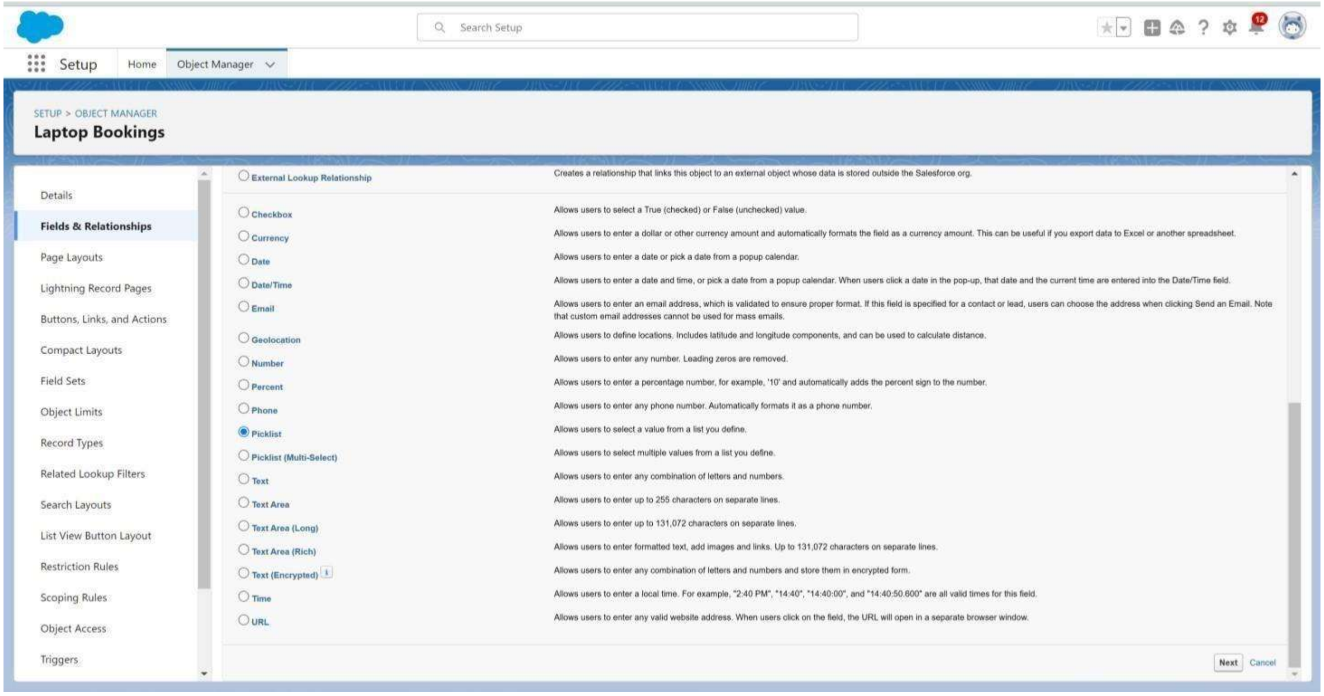

Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Laptop Bookings
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Triggers
values in the list.
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.
The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.
External Lookup Relationship
Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
Checkbox
Allows users to select a True (checked) or False (unchecked) value.
Currency
Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
Date
Allows users to enter a date or pick a date from a popup calendar.
Date/Time
Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
Email
Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
Geolocation
Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
Number
Allows users to enter any number. Leading zeros are removed.
Percent
Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
Phone
Allows users to enter any phone number. Automatically formats it as a phone number.
Picklist
Allows users to select a value from a list you define.
Picklist (Multi-Select)
Allows users to select multiple values from a list you define.
Text
Allows users to enter any combination of letters and numbers.
Text Area
Allows users to enter up to 255 characters on separate lines.
Text Area (Long)
Allows users to enter up to 131,072 characters on separate lines.
Text Area (Rich)
Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
Text (Encrypted)
Allows users to enter any combination of letters and numbers and store them in encrypted form.

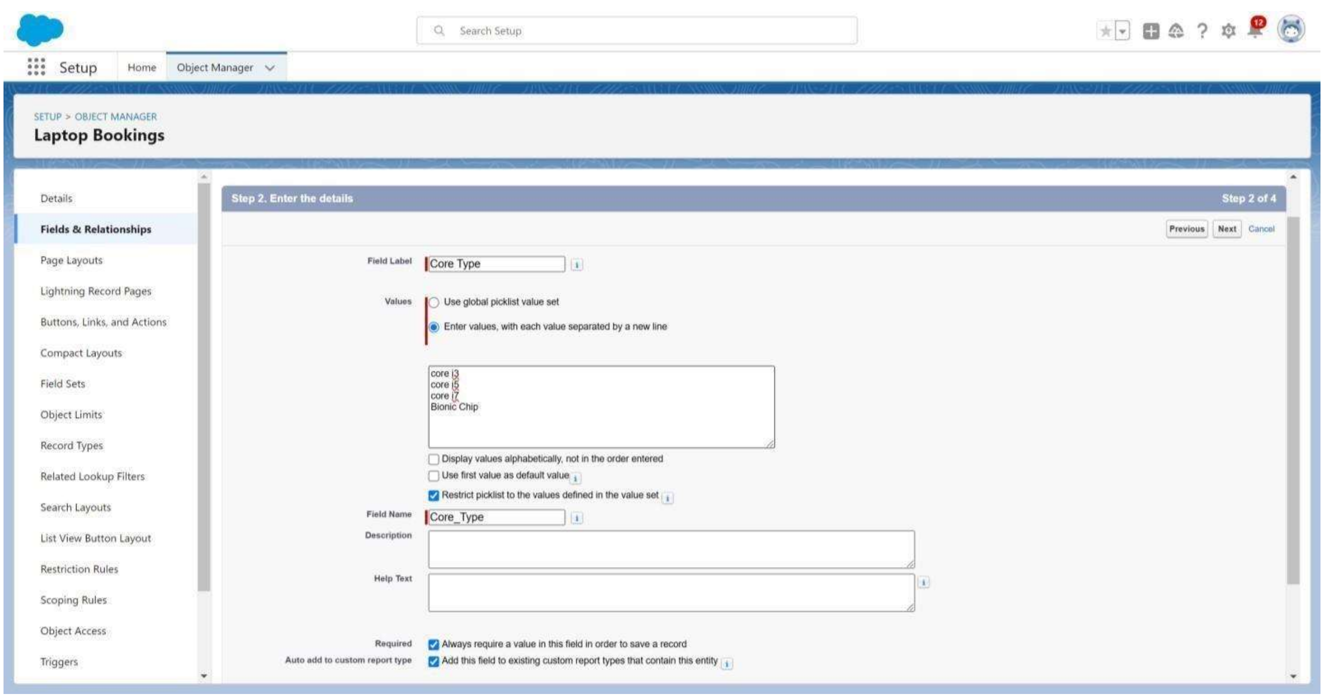


2. To Create a Fields & Relationship to an Laptop Booking Object

To create fields & relationship to an object:

a. Go to setup >> click on Object Manager >> type object name(Laptop Booking) in the search bar >> click on the object.
b. Now click on “Fields & Relationships” >> New
c. Select Data Type as a “Picklist” and Label: Core Type
d. Picklist values are:-1.core i3 2. Core i5 3. Core i7 4.Bionic Chip .
e. Select required.
f. Click on Next >> Next >> Save and new

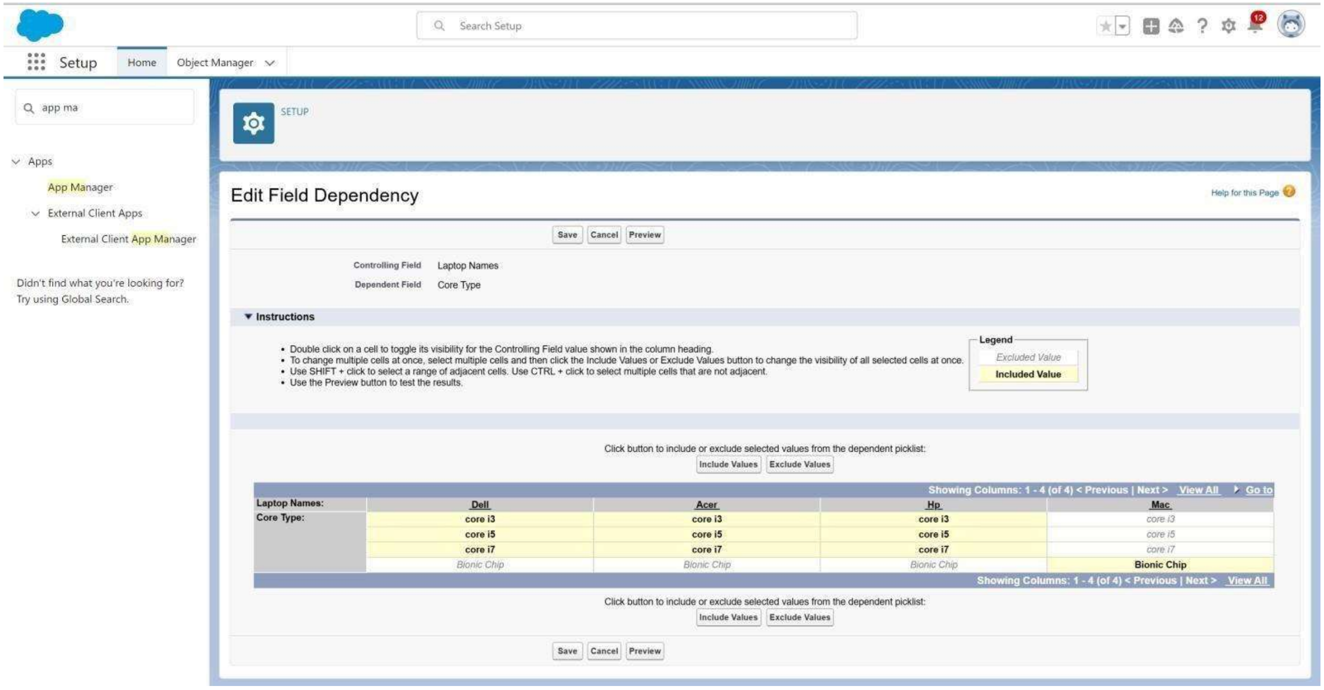




3. To Create a Field Dependency in the Laptop Booking Object

To create field dependency to an object:

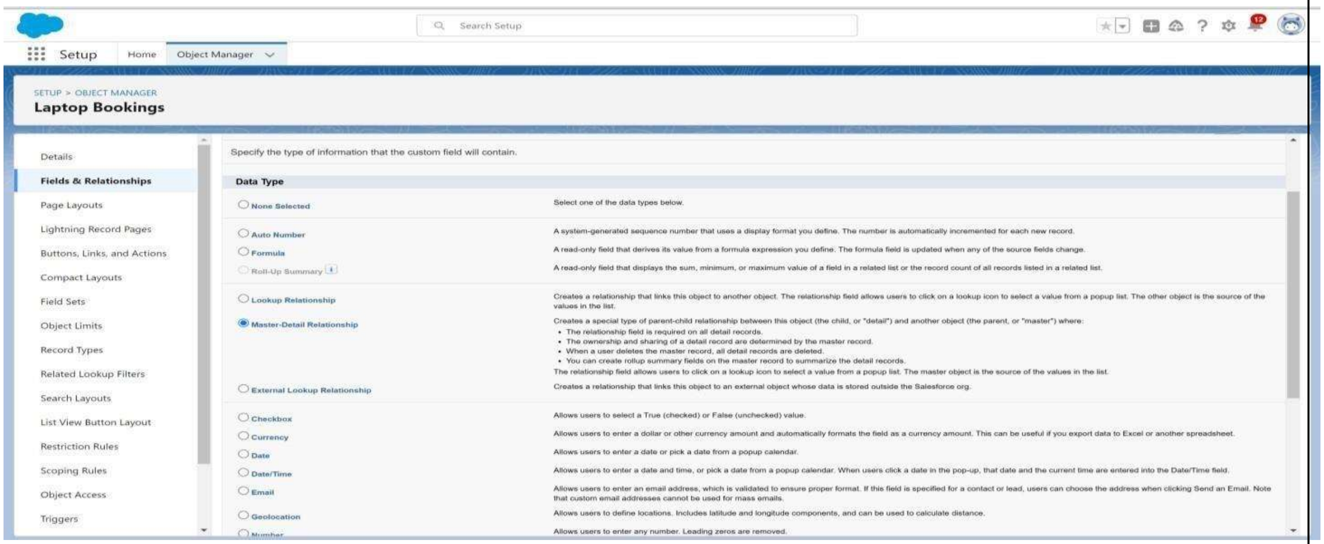
1. Go to setup >> click on Object Manager >> type object name(Laptop Bookings) in the search bar >> click on the object.
2. click field dependency and next
3. Select **Controlling Field** as Laptop Names and **Dependent Field** as Core Type
4. Click the include value for dell-core i3,i5,i7 and for acer i3,i5,i7 and for hp i3,i5,i7 and also for mac bionic chip include the values for it.
5. Click save.



1.To Create a Fields & Relationship to an Laptop Booking and Total Laptops Objects To create 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
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
6. Fill the Above as following:
   - Change the Field Label: Consumer
   - Field Name :It’s gets auto generated

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


Search Setup
Setup
Home
Object Manager
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Laptop Bookings
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Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
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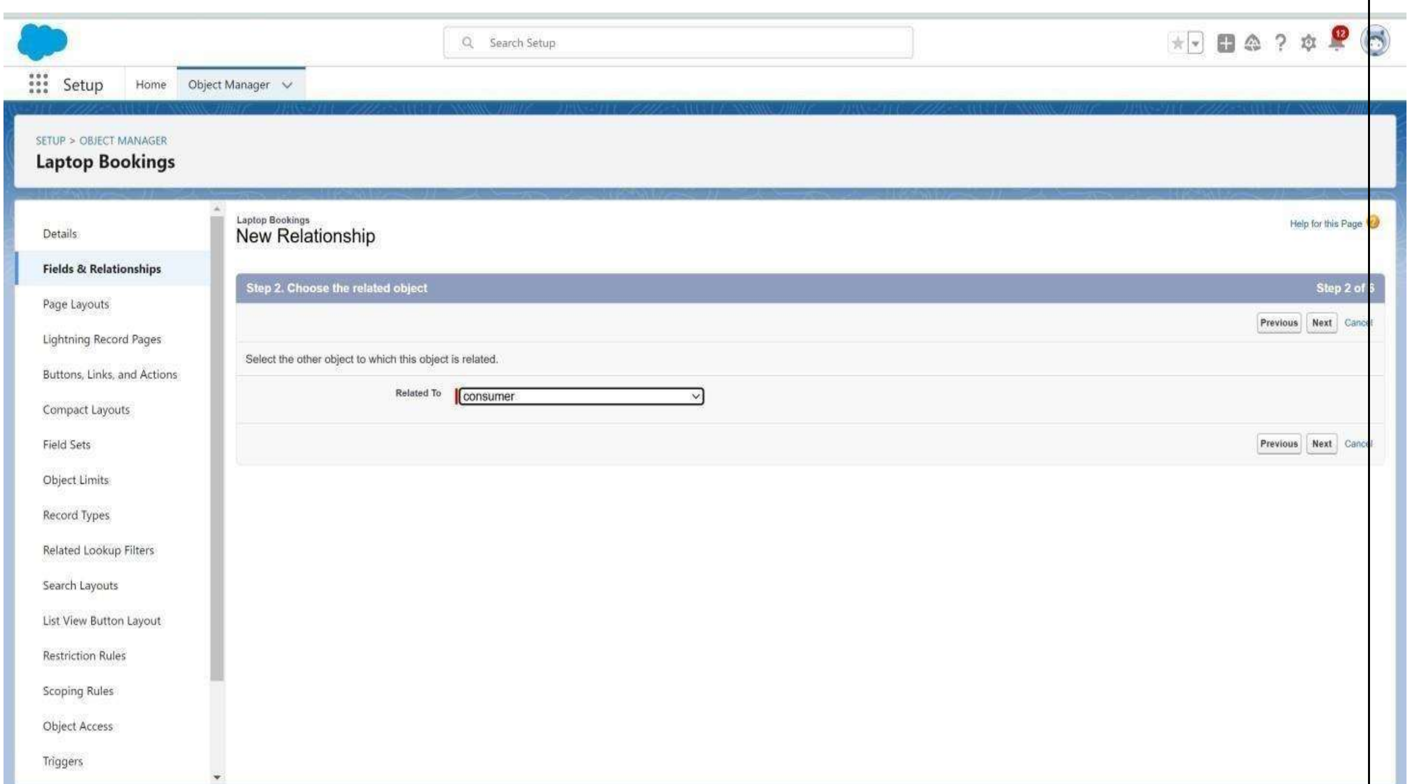
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Triggers
Specify the type of information that the custom field will contain.
Data Type
None Selected
Select one of the data types below.
Auto Number
A system-generated sequence number that uses a display format you define. 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.
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.
The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.
External Lookup Relationship
Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
Checkbox
Allows users to select a True (checked) or False (unchecked) value.
Currency
Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
Date
Allows users to enter a date or pick a date from a popup calendar.
Date/Time
Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
Email
Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
Geolocation
Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
Number
Allows users to enter any number. Leading zeros are removed.


Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Laptop Bookings
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
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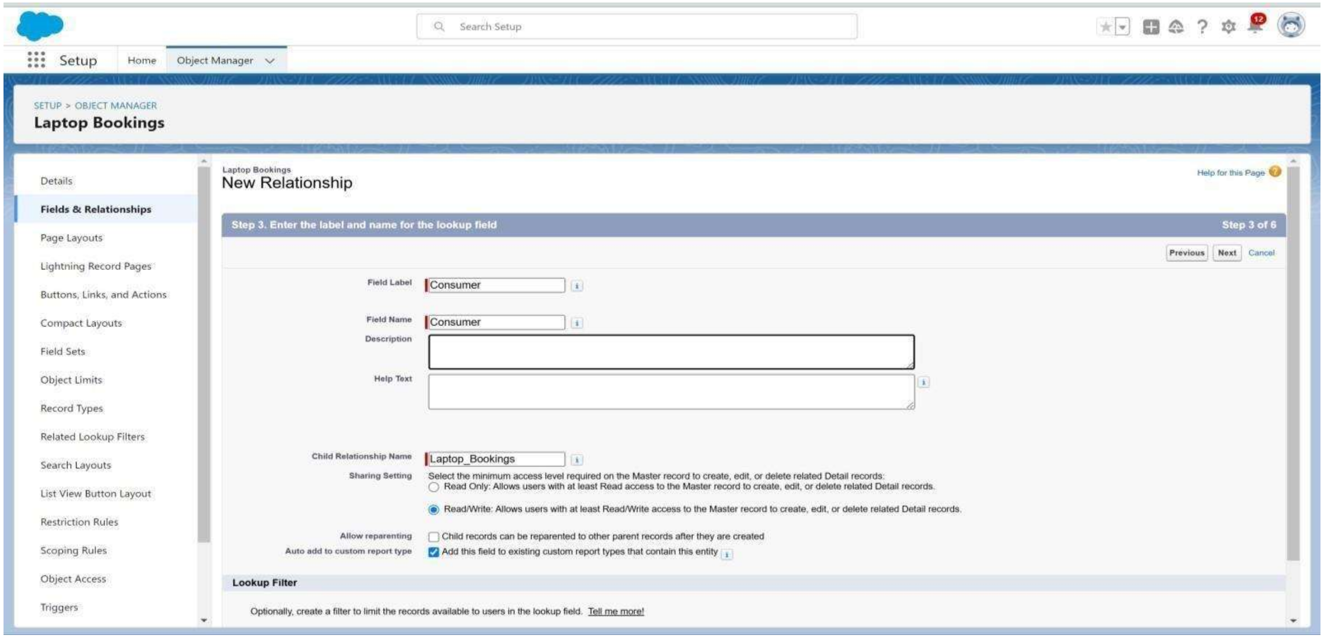
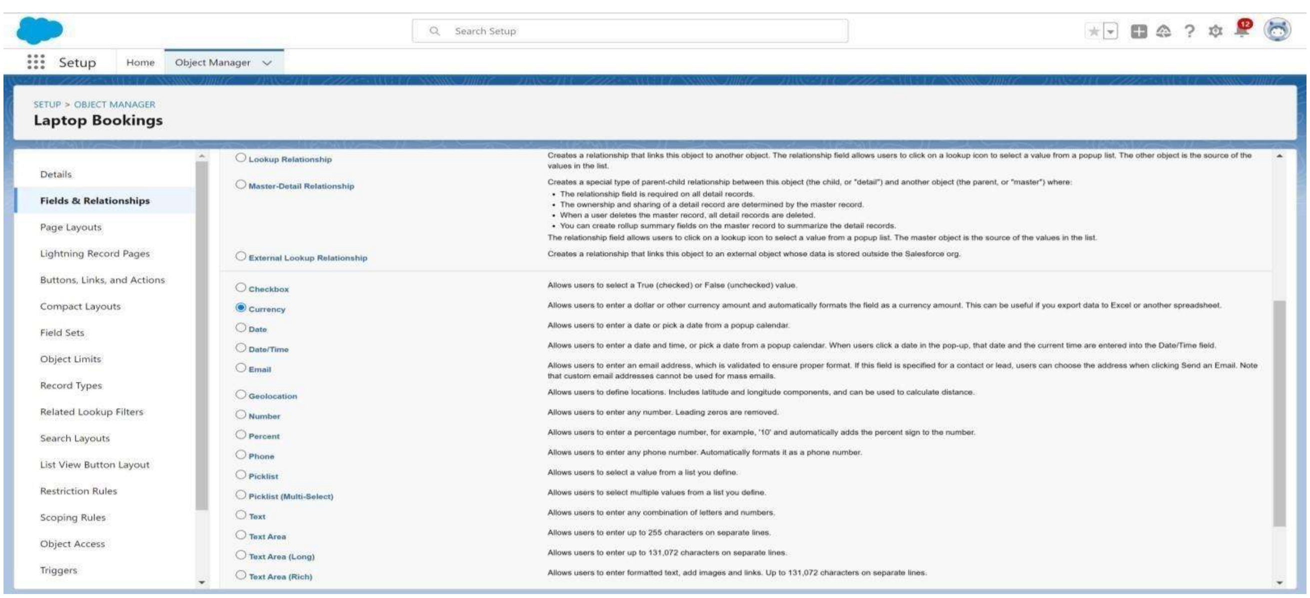
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Triggers
Laptop Bookings
New Relationship
Help for this Page
Step 2. Choose the related object
Previous
Next
Select the other object to which this object is related.
Related To
consumer
Previous
Next

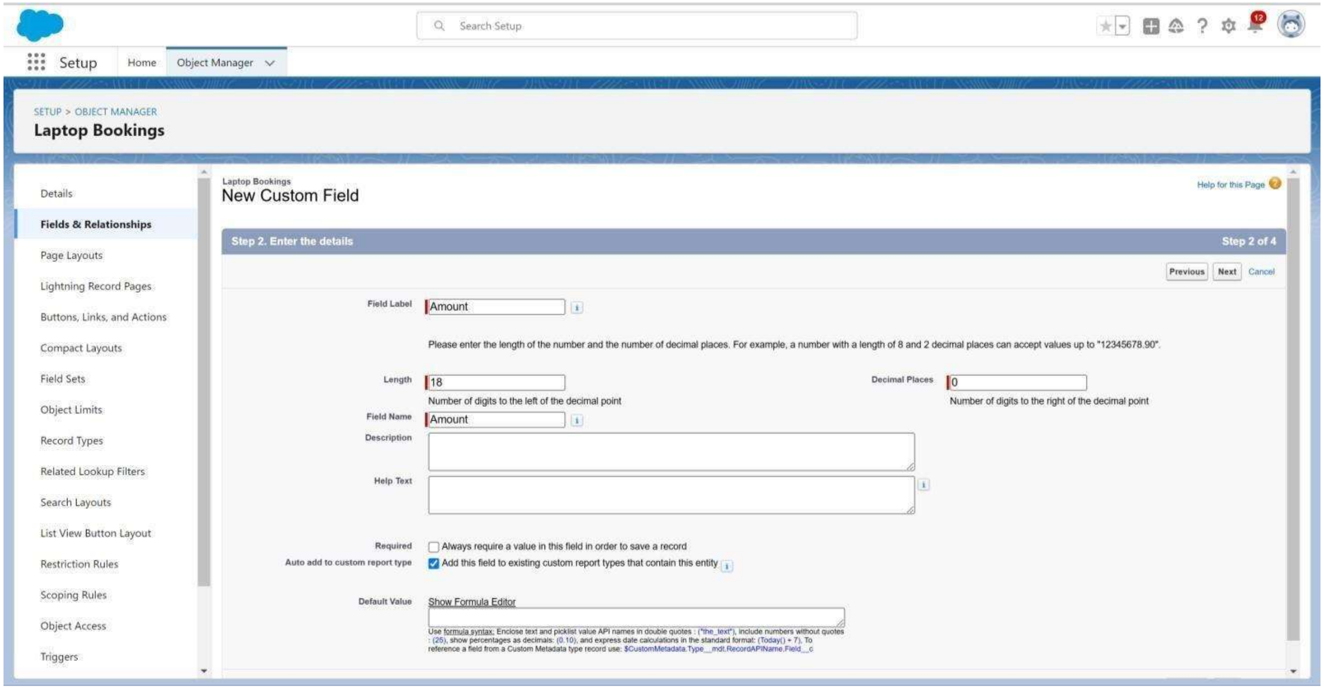


2. To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Laptop Bookings) in the
2. 2.search bar >> click on the object.
3. Now click on “Fields & Relationships” >> New
4. Select Data Type as a “Currency”
5. Click on Next
6. Fill the Above as following:

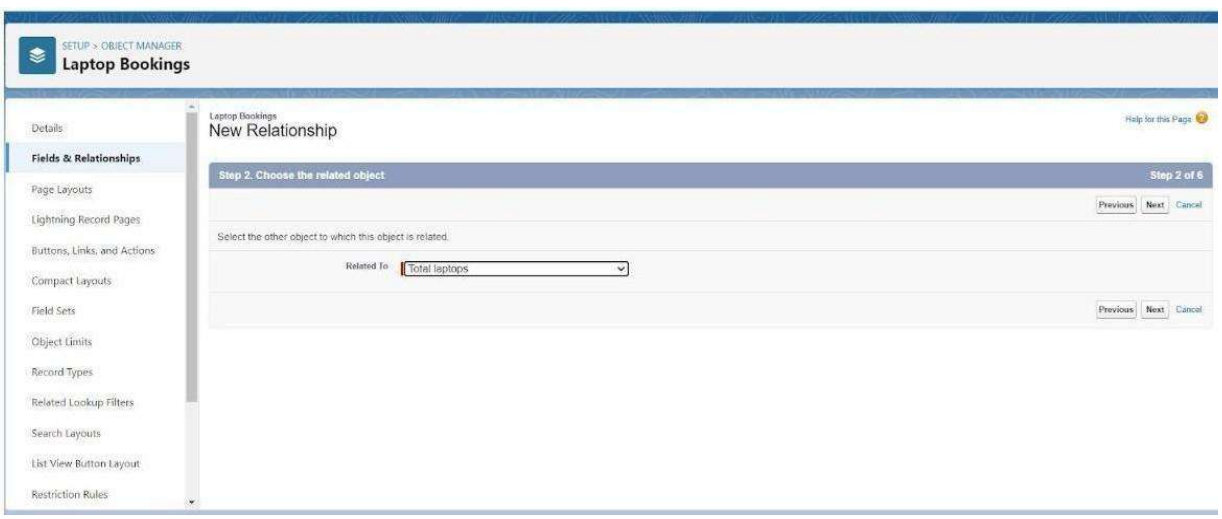
   - Field Label: Amount
   - Length: (18,0)
   - Field Name: It’s gets auto generated
   - Click on Next >> Next >> Save and new





3.To Create a Fields & Relationship to an Object

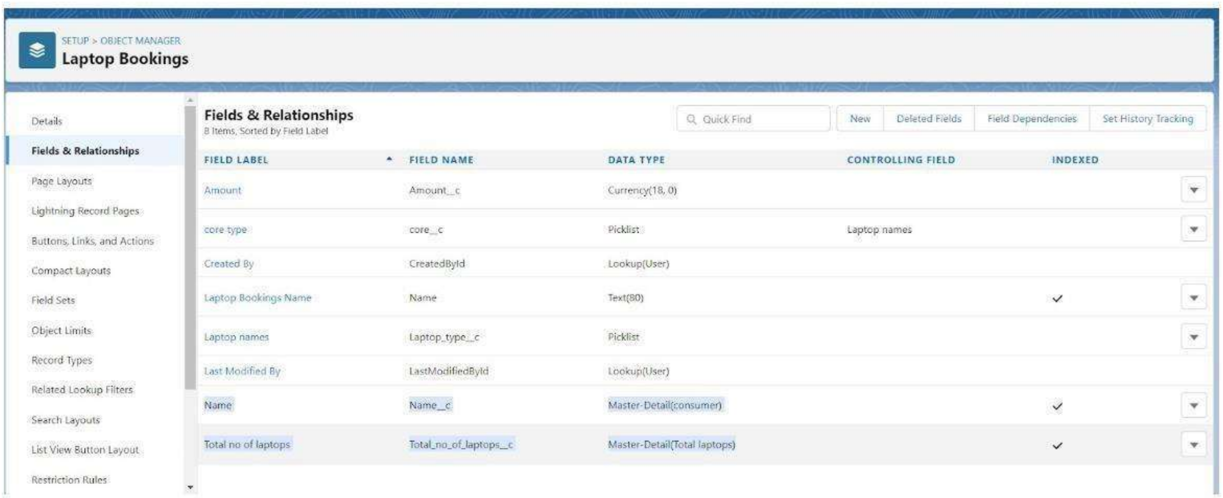
1. Go to setup >> click on Object Manager >> type object name(Laptop Booking) in the search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data Type as a “Master-Detail Relationship”
4. Click on Next
5. Click on the Related to drop down and Select the “Total Laptops” object and click on Next 6. Fill the Above as following:
6. Change the Field Label: Total No Of Laptops
7. Field Name: It’s gets auto generated 9. Click on Next >> Next >> Save and new.



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

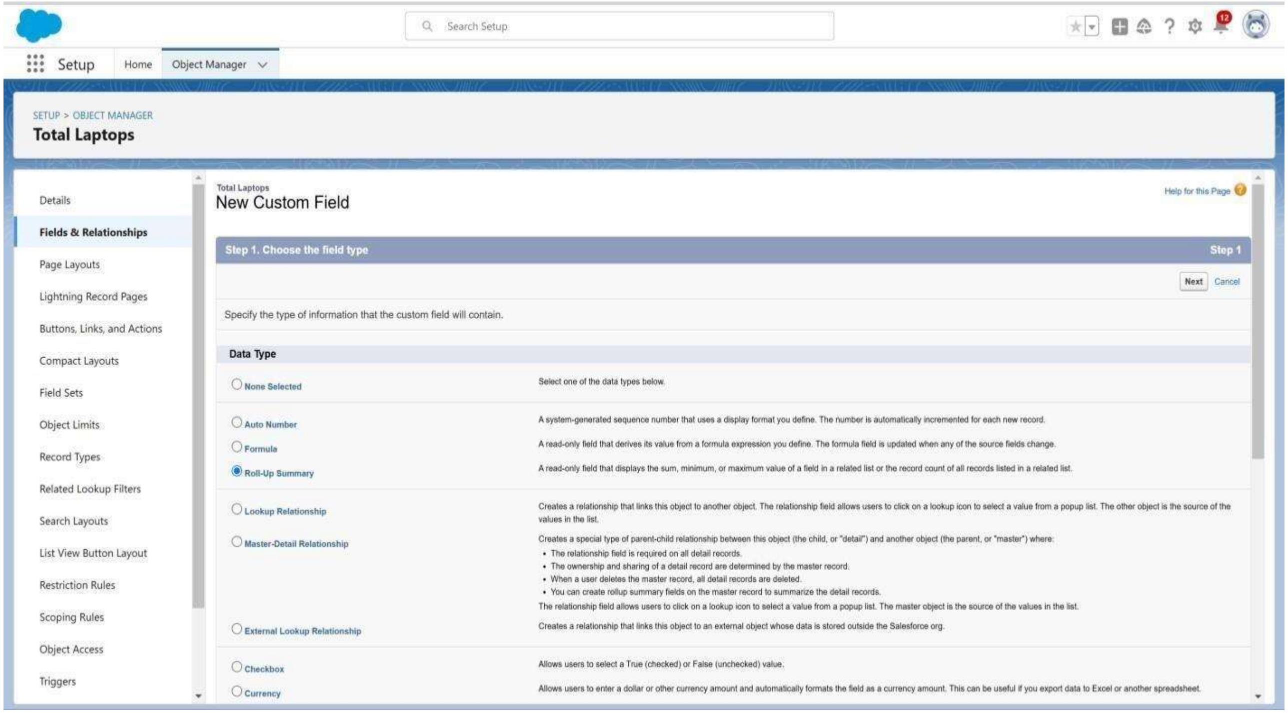
To create fields & relationship to an object:

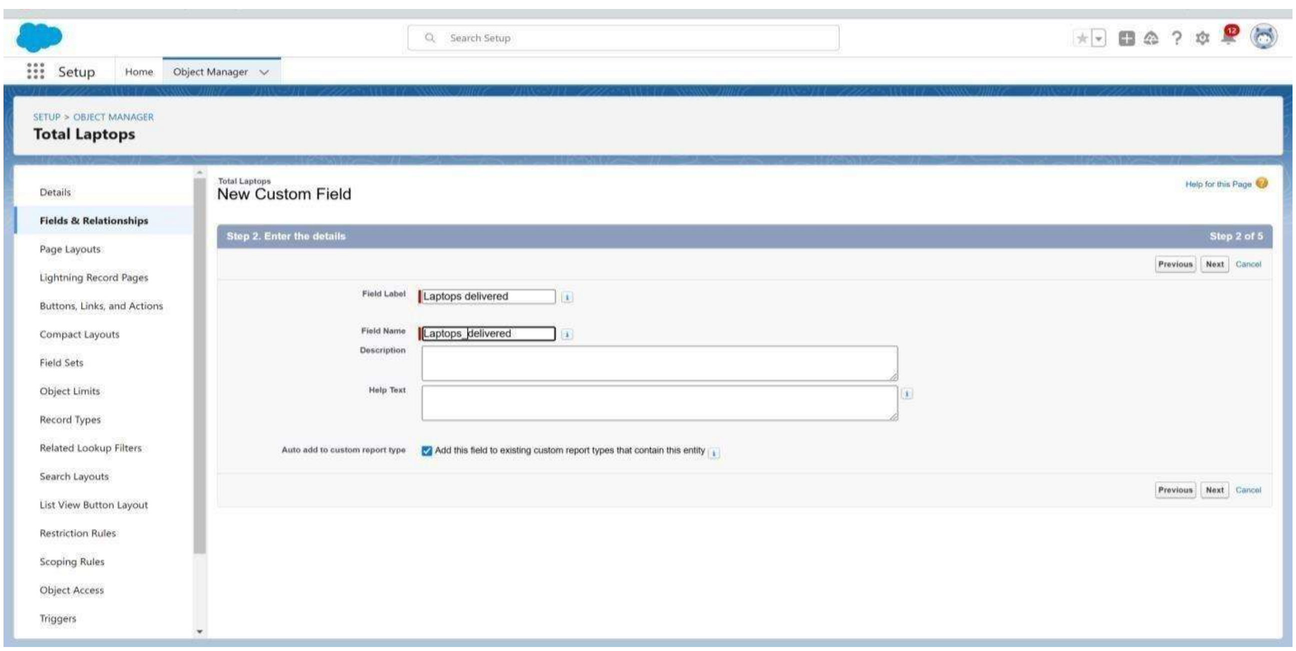
1. Go to setup >> click on Object Manager >> type object name(Laptop Booking) in the search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data Type as a “Email” 4. Click on Next and save it.

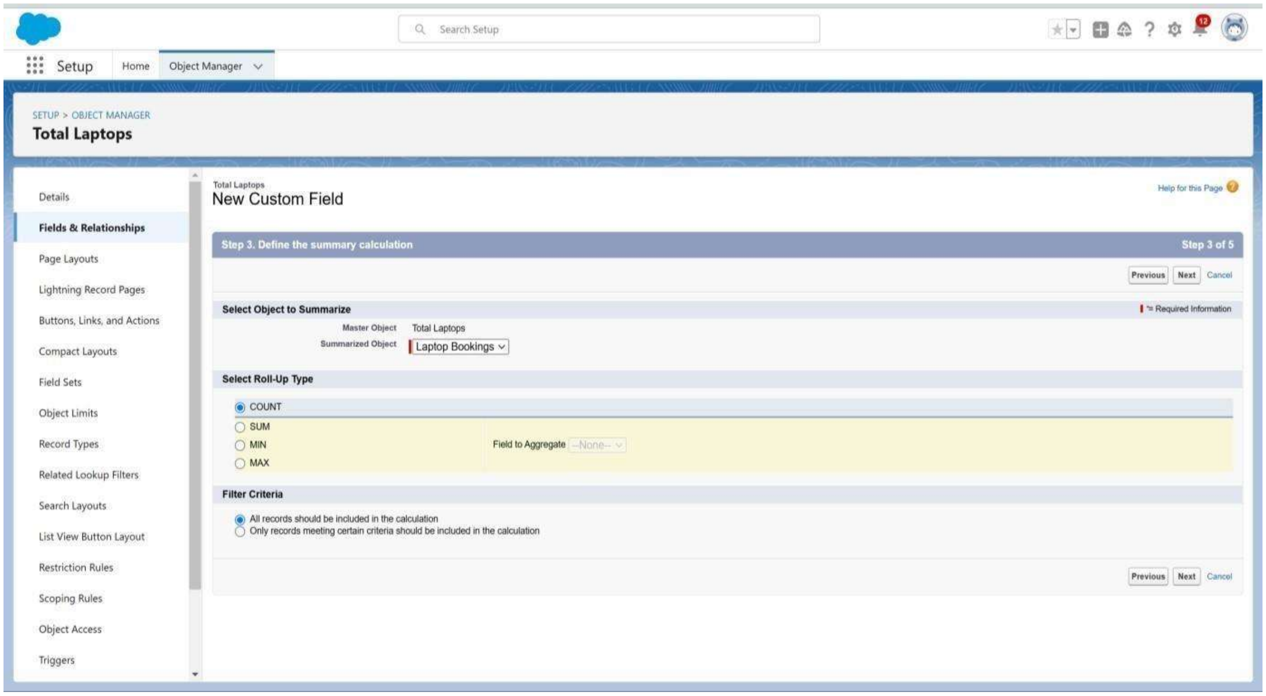


To Create a Rollup Summary Field in “Total Laptops Object”

1. After Creating the Master-Detail Relationship Than Only you can create the Rollup Summary
2. Go to setup >> click on Object Manager >> type object name(Total Laptops) in the search bar >> click on the object.
3. Now click on “Fields & Relationships” >> New
4. Select Data type as a “Roll-up Summary” and Click on Next
5. Fill the Above as following:
   - Field Label: Laptops delivered
   - Field Name :It’s gets auto generated
6. Click on Next
7. Select the Laptop Bookings in the Summarized Object
8. Select the count Radio button in the select Roll-up Type
9. Click>>next >>next>>save


Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
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
Scoping Rules
Object Access
Triggers
Total Laptops
New Custom Field
Help for this Page
Step 1. Choose the field type
Step 1
Next
Cancel
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.
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.
The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.
External Lookup Relationship
Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
Checkbox
Allows users to select a True (checked) or False (unchecked) value.
Currency
Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.


Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
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
Scoping Rules
Object Access
Triggers
Total Laptops
New Custom Field
Help for this Page
Step 2. Enter the details
Step 2 of 5
Previous
Next
Cancel
Field Label
Laptops delivered
Field Name
Laptops_delivered
Description
Help Text
Auto add to custom report type
Add this field to existing custom report types that contain this entity

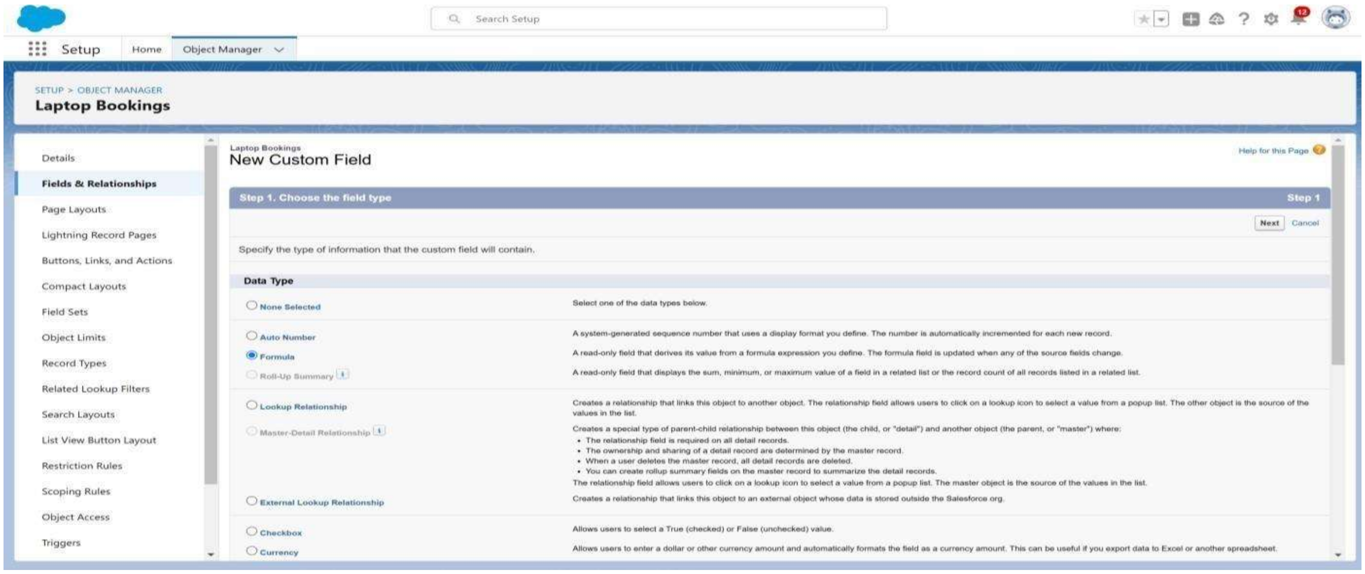


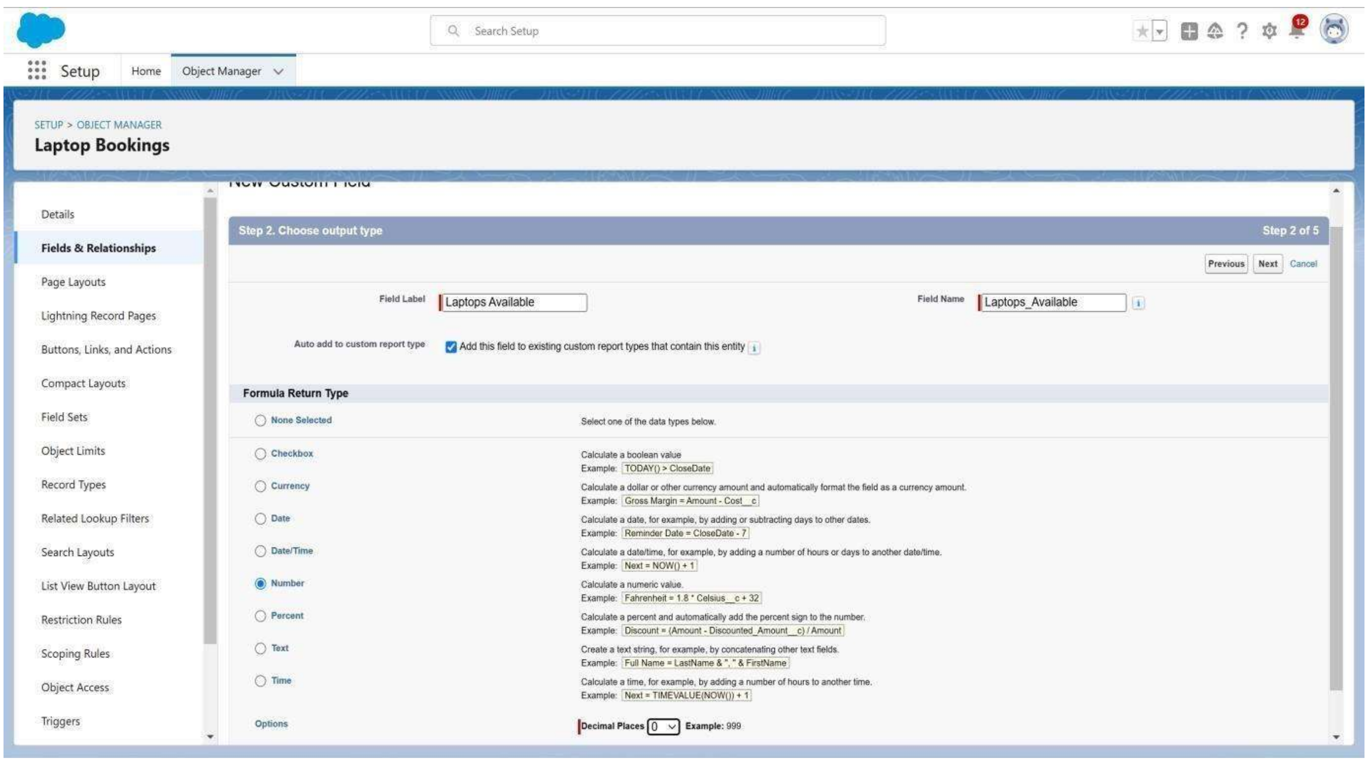
To create fields in an object:

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 "Formula" and Click on Next

4. 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 formula box " 50 - " and Click on insert field than you will find a pop window under the Laptop Booking select the Total No Of Laptops in the second Column and select the Laptops delivered in the third column and click on insert
- " 50 - Total_no_of_laptops_r.Laptops_delivered_c " and Check Syntax
- Click on Next >> Next >> Save and new


Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
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
Scoping Rules
Object Access
Triggers
Laptop Bookings
New Custom Field
Help for this Page
Step 1. Choose the field type
Step 1
Next
Cancel
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.
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.
The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.
External Lookup Relationship
Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
Checkbox
Allows users to select a True (checked) or False (unchecked) value.
Currency
Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.


Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Laptop Bookings
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
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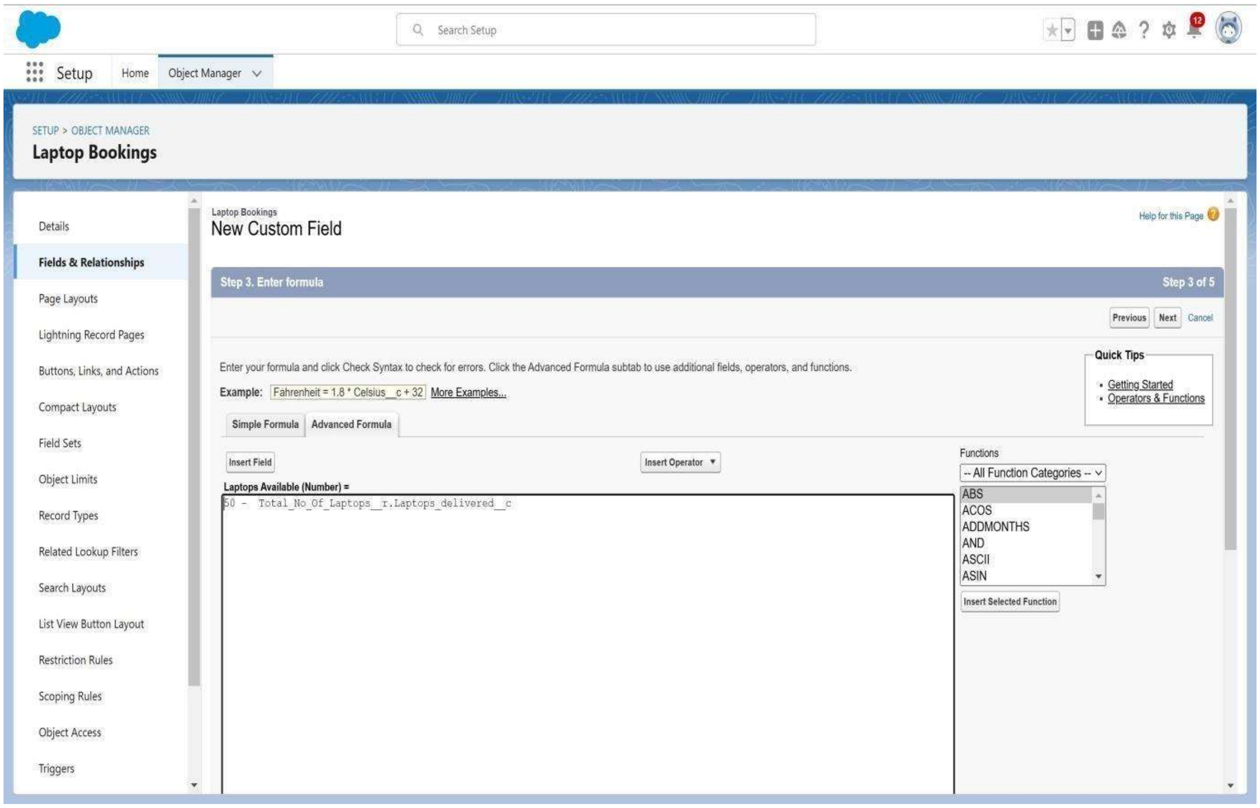
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Triggers
Step 2. Choose output type
Step 2 of 5
Previous
Next
Cancel
Field Label
Laptops Available
Field Name
Laptops_Available
Auto add to custom report type
Add this field to existing custom report types that contain this entity
Formula Return Type
None Selected
Select one of the data types below.
Checkbox
Calculate a boolean value
Example: TODAY() > CloseDate
Currency
Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: Gross Margin = Amount - Cost__c
Date
Calculate a date, for example, by adding or subtracting days to other dates.
Example: Reminder Date = CloseDate - 7
Date/Time
Calculate a date/time, for example, by adding a number of hours or days to another date/time.
Example: Next = NOW() + 1
Number
Calculate a numeric value.
Example: Fahrenheit = 1.8 * Celsius__c + 32
Percent
Calculate a percent and automatically add the percent sign to the number.
Example: Discount = (Amount - Discounted_Amount__c) / Amount
Text
Create a text string, for example, by concatenating other text fields.
Example: Full Name = LastName & ", " & FirstName
Time
Calculate a time, for example, by adding a number of hours to another time.
Example: Next = TIMEVALUE(NOW()) + 1
Options
Decimal Places
0
Example: 999



To create fields in an object:

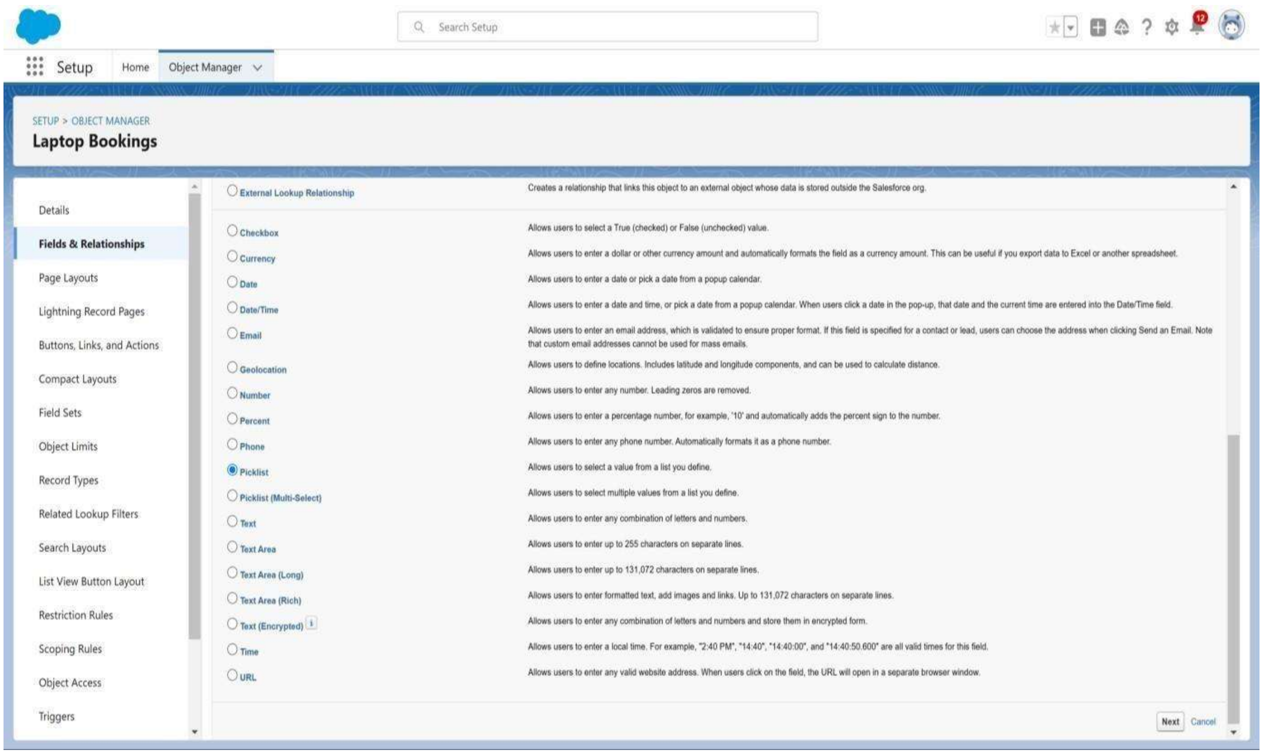
1.Go to setup >> click on Object Manager >> type object name(Laptop Booking) in the

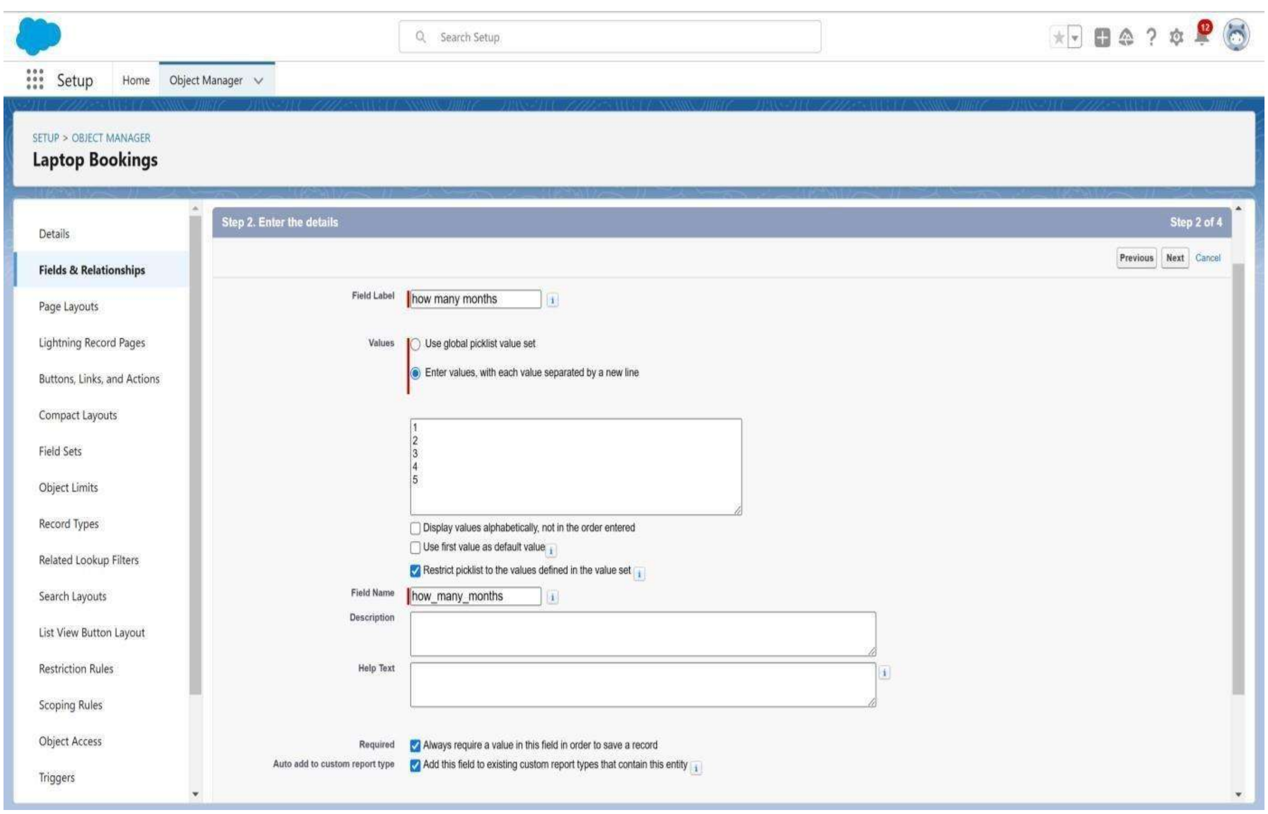
2.search bar >> click on the object.

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

4.Select Data Type as a “picklist” and Label: how many months

5. Picklist values are 1.2.3.4.5 6. Click and save it.

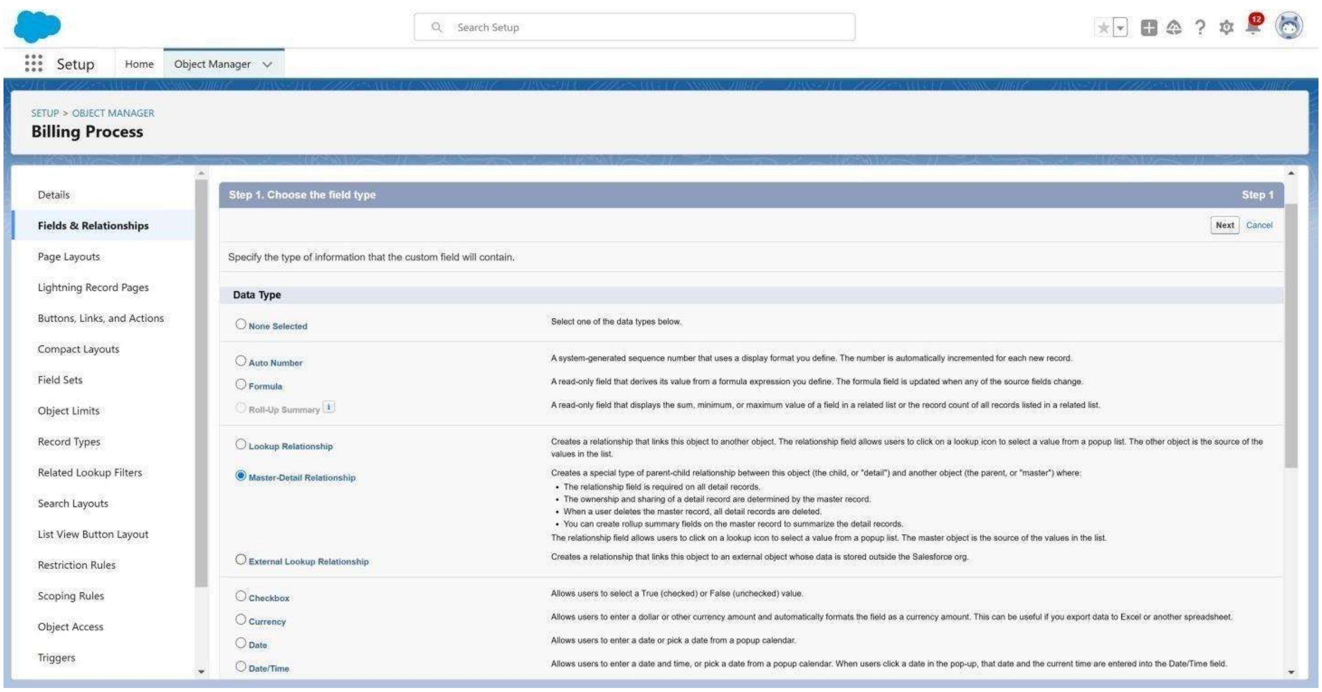

Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Laptop Bookings
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Triggers
External Lookup Relationship
Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
Checkbox
Allows users to select a True (checked) or False (unchecked) value.
Currency
Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
Date
Allows users to enter a date or pick a date from a popup calendar.
Date/Time
Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
Email
Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
Geolocation
Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
Number
Allows users to enter any number. Leading zeros are removed.
Percent
Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
Phone
Allows users to enter any phone number. Automatically formats it as a phone number.
Picklist
Allows users to select a value from a list you define.
Picklist (Multi-Select)
Allows users to select multiple values from a list you define.
Text
Allows users to enter any combination of letters and numbers.
Text Area
Allows users to enter up to 255 characters on separate lines.
Text Area (Long)
Allows users to enter up to 131,072 characters on separate lines.
Text Area (Rich)
Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
Text (Encrypted)
Allows users to enter any combination of letters and numbers and store them in encrypted form.
Time
Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50.600" are all valid times for this field.
URL
Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.
Next
Cancel


Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
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
Scoping Rules
Object Access
Triggers
Step 2. Enter the details
Step 2 of 4
Previous
Next
Cancel
Field Label
how many months
Values
Use global picklist value set
Enter values, with each value separated by a new line
1
2
3
4
5
Display values alphabetically, not in the order entered
Use first value as default value
Restrict picklist to the values defined in the value set
Field Name
how_many_months
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

Creation of Fields & Relationship for Billing Process Object

1. 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



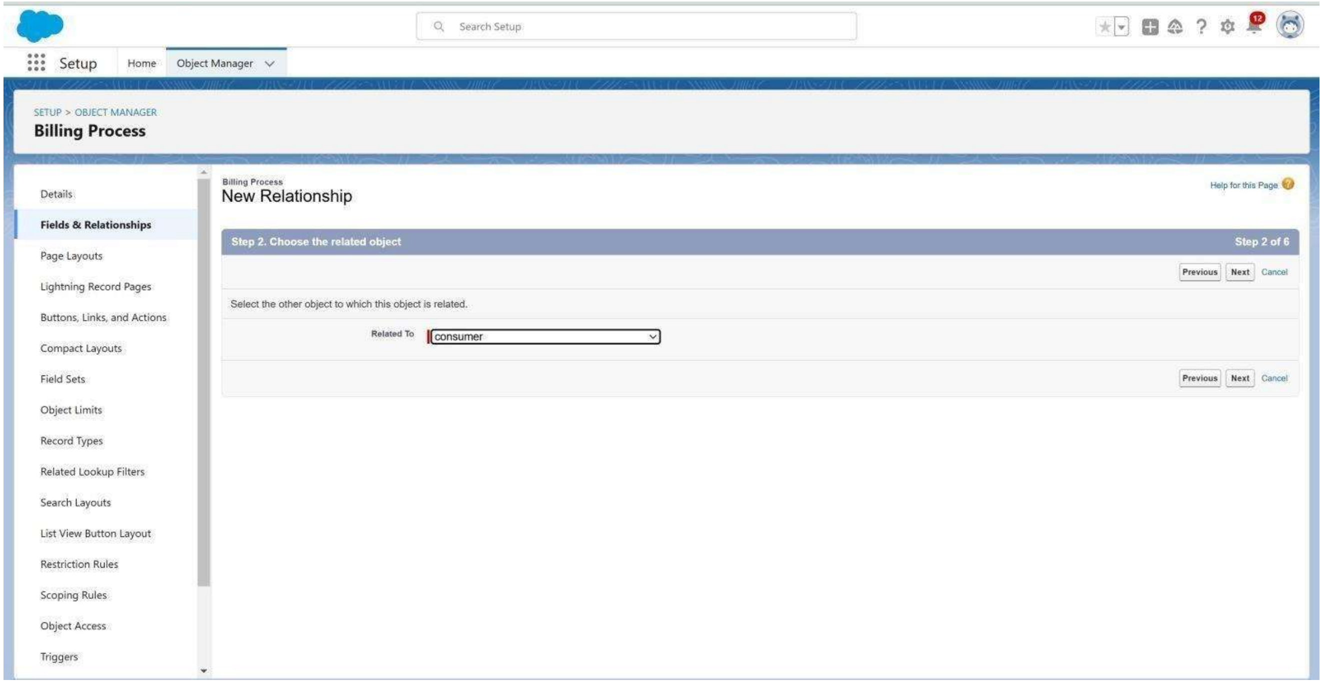
Fill the Above as following:

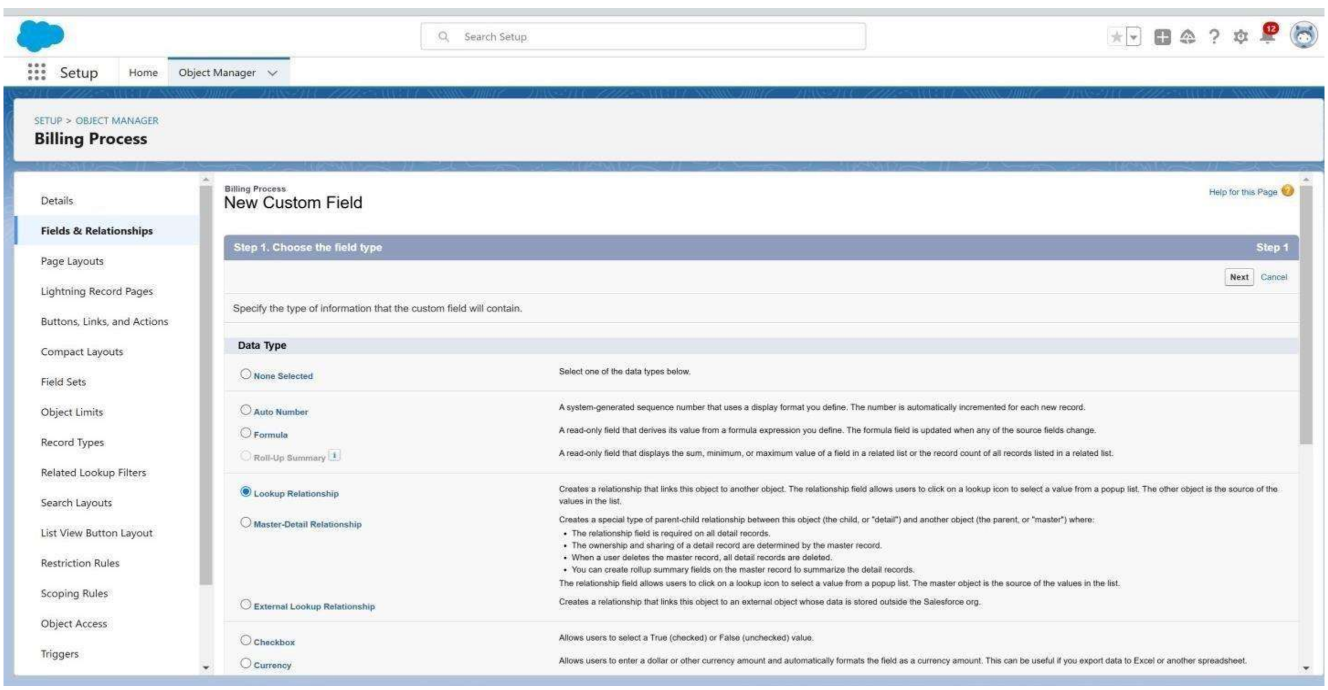
- Change the Field Label: Name
- Field Name :It's gets auto generated
- Click on Next >> Next >> Save and new.

2. **To create another 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 and click on Next


Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Billing Process
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
Scoping Rules
Object Access
Triggers
Billing Process
New Relationship
Help for this Page
Step 2. Choose the related object
Step 2 of 6
Previous
Next
Cancel
Select the other object to which this object is related.
Related To
consumer
Previous
Next
Cancel


Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Billing Process
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
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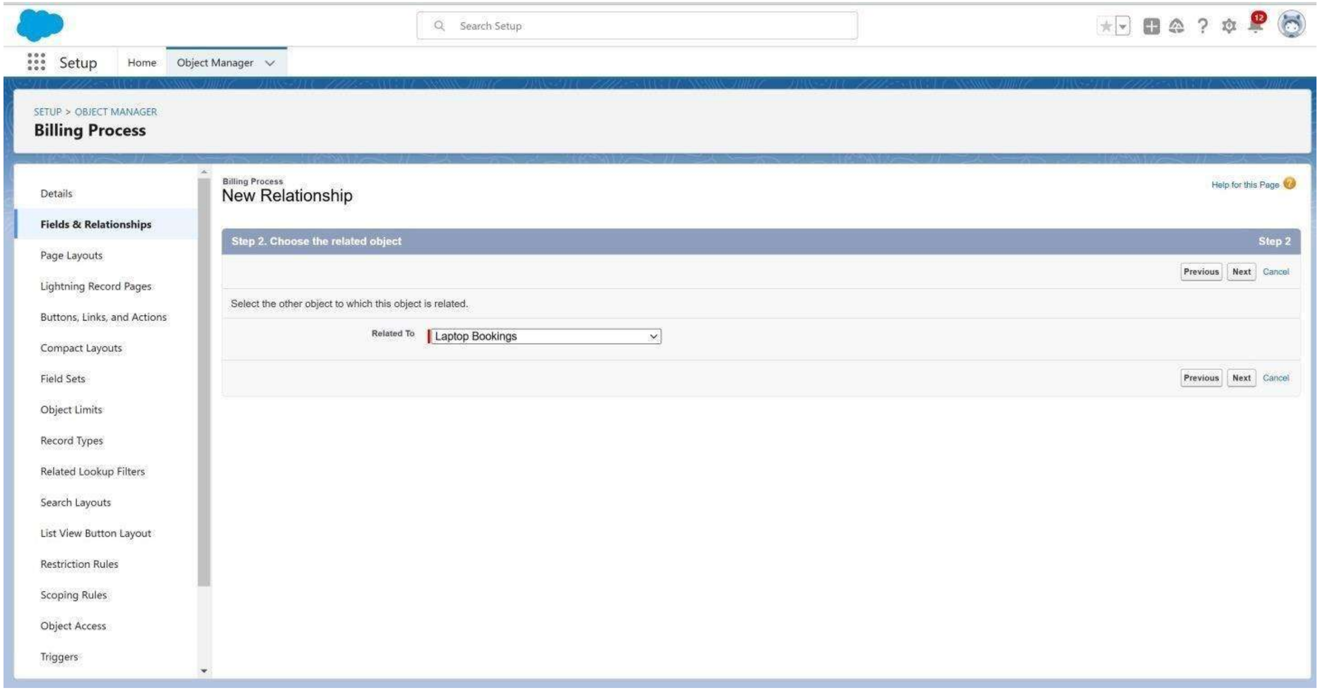
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Triggers
Billing Process
New Custom Field
Help for this Page
Step 1. Choose the field type
Step 1
Next
Cancel
Specify the type of information that the custom field will contain.
Data 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.
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.
The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.
External Lookup Relationship
Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
Checkbox
Allows users to select a True (checked) or False (unchecked) value.
Currency
Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.


Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Billing Process
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
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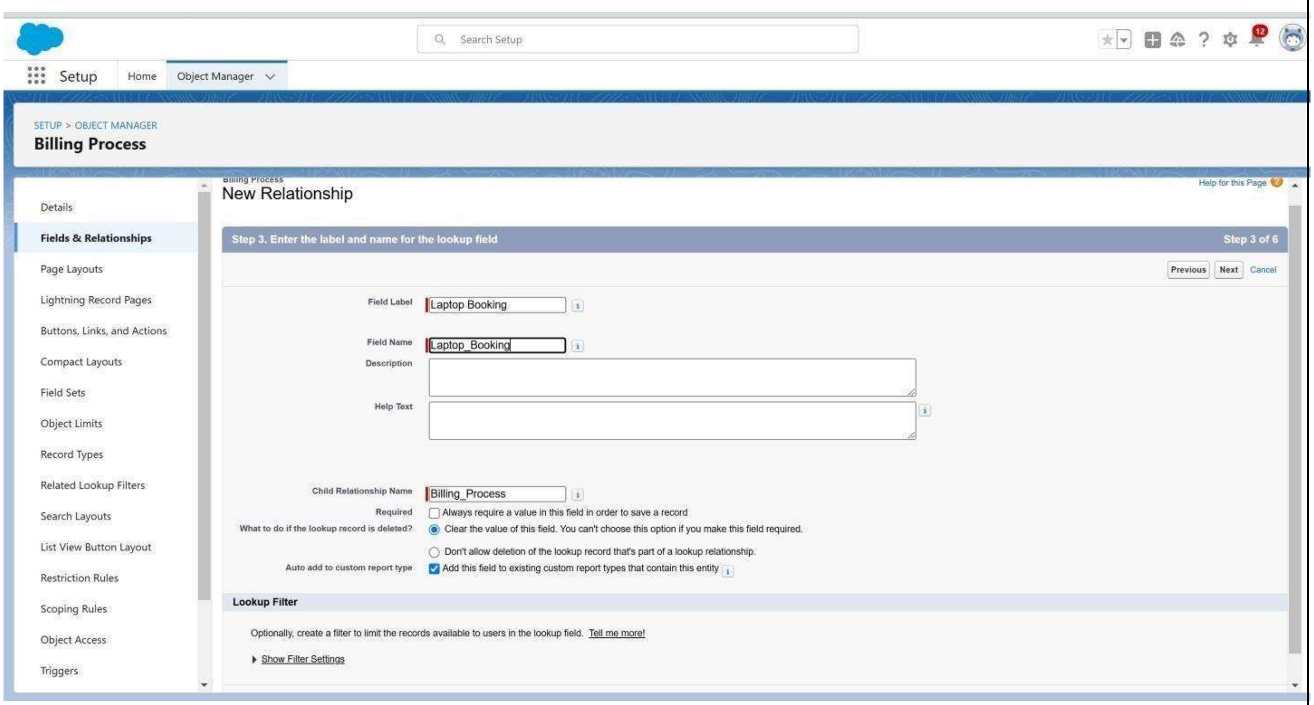
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Triggers
Billing Process
New Relationship
Help for this Page
Step 2. Choose the related object
Step 2
Previous
Next
Cancel
Select the other object to which this object is related.
Related To
Laptop Bookings
Previous
Next
Cancel


Search Setup
Setup
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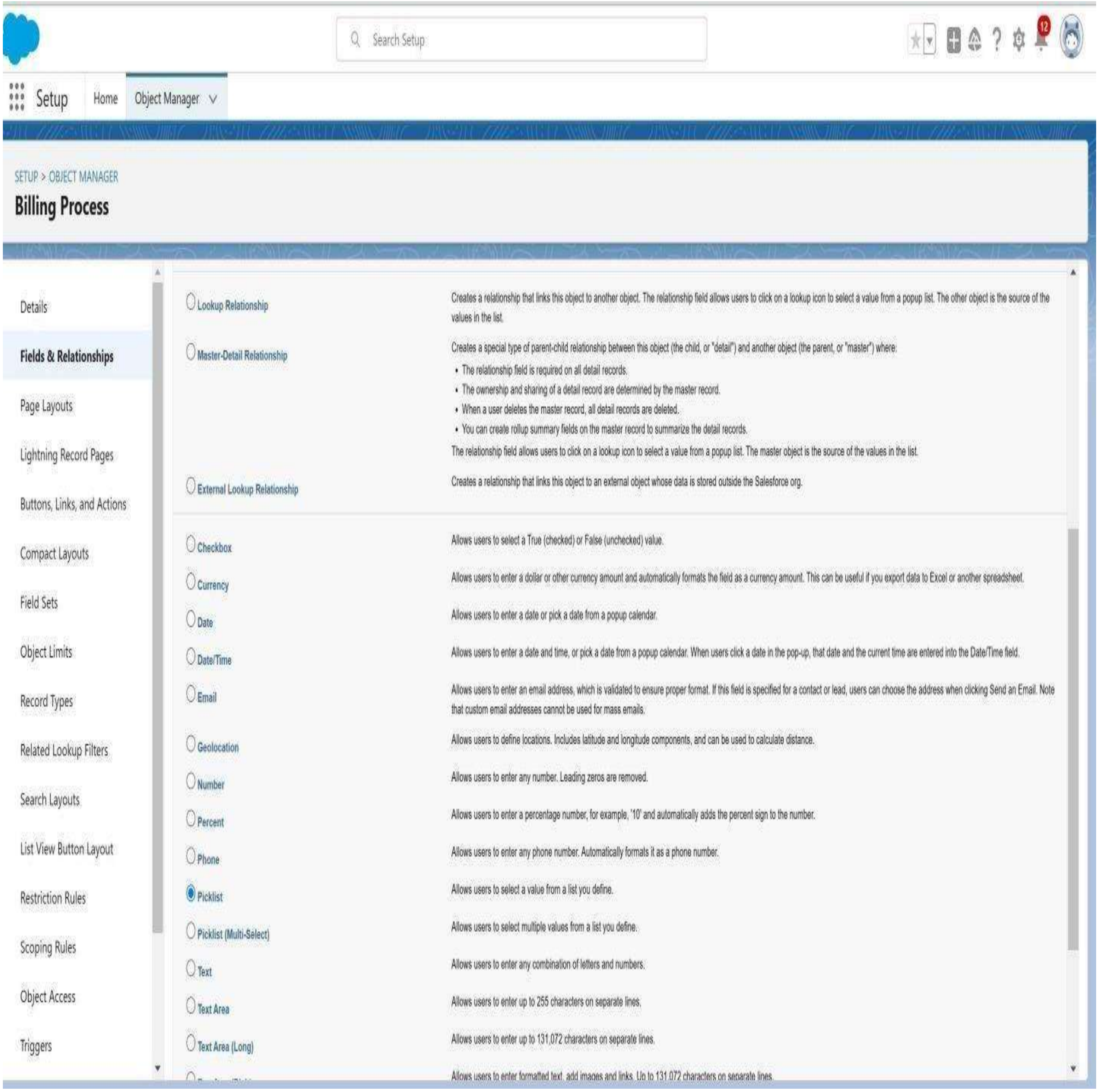
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Triggers
Billing Process
New Relationship
Help for this Page
Step 3. Enter the label and name for the lookup field
Step 3 of 6
Previous
Next
Cancel
Field Label
Laptop Booking
Field Name
Laptop_Booking
Description
Help Text
Child Relationship Name
Billing_Process
Required
Always require a value in this field in order to save a record
What to do if the lookup record is deleted?
Clear the value of this field. You can't choose this option if you make this field required.
Don't allow deletion of the lookup record that's part of a lookup relationship.
Auto add to custom report type
Add this field to existing custom report types that contain this entity
Lookup Filter
Optionally, create a filter to limit the records available to users in the lookup field. Tell me more!
Show Filter Settings


Search Setup
Setup
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Object Manager
SETUP > OBJECT MANAGER
Billing Process
Details
Fields & Relationships
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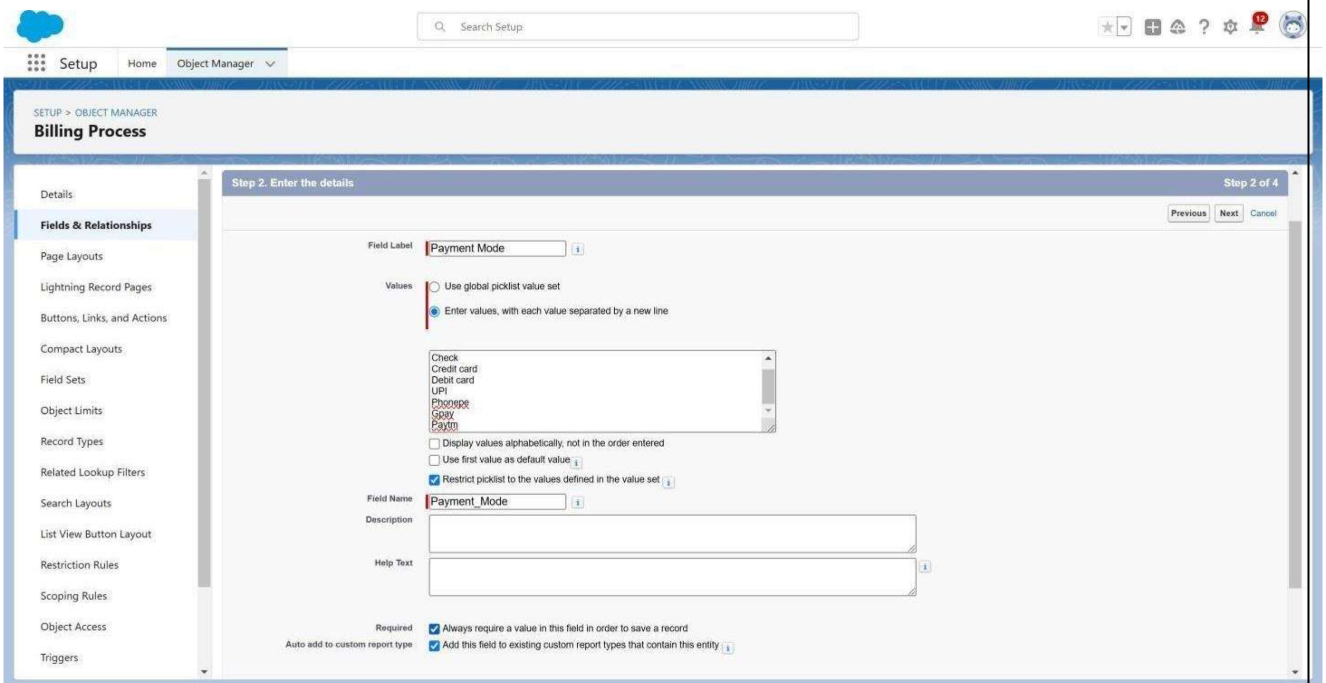
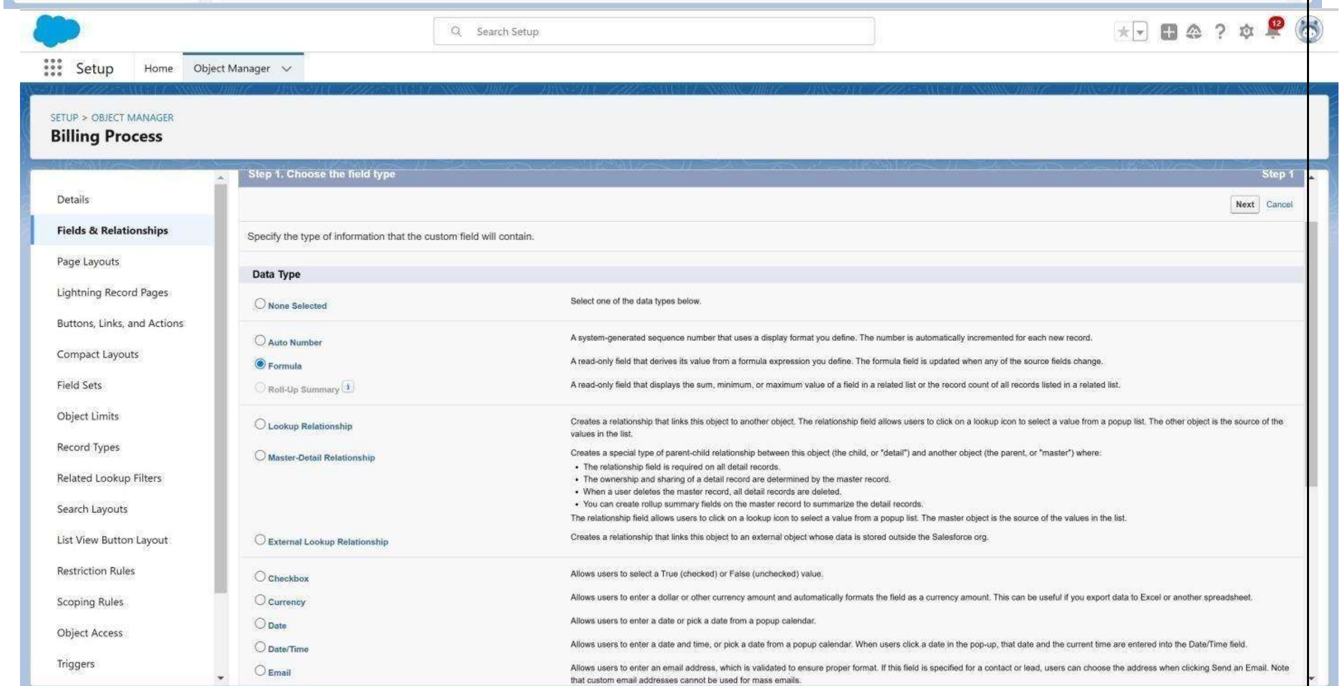
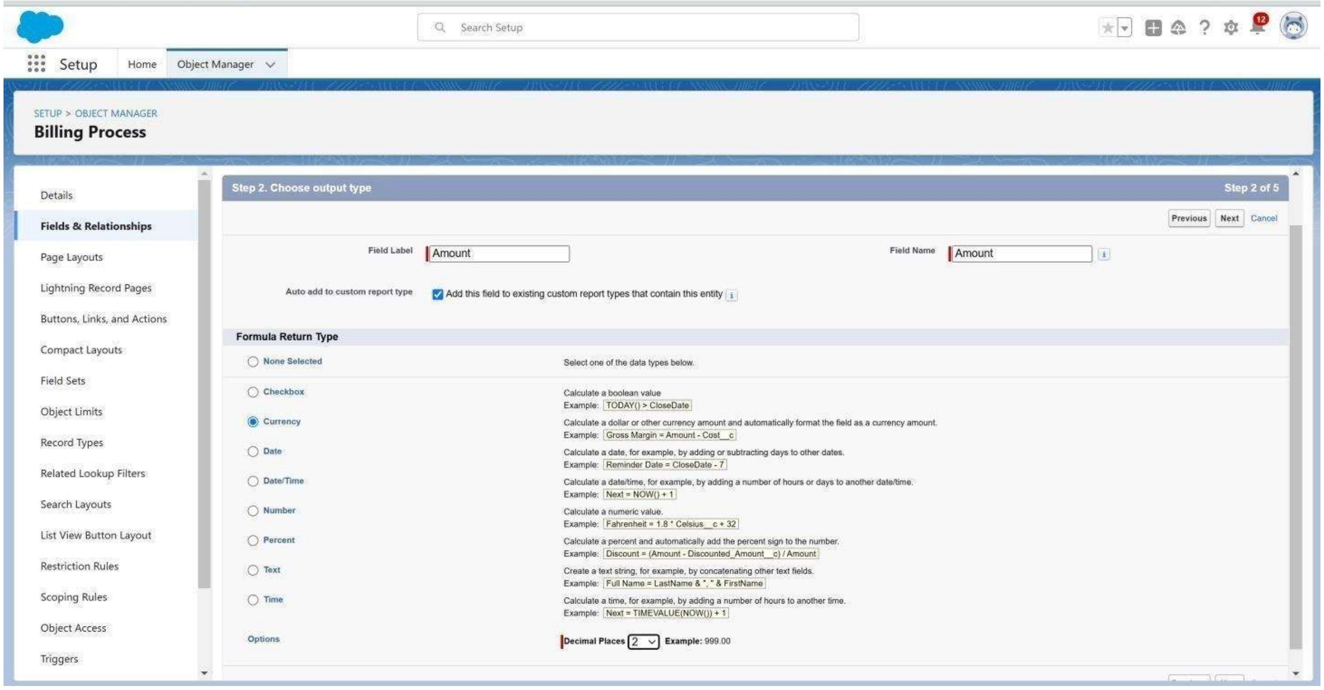
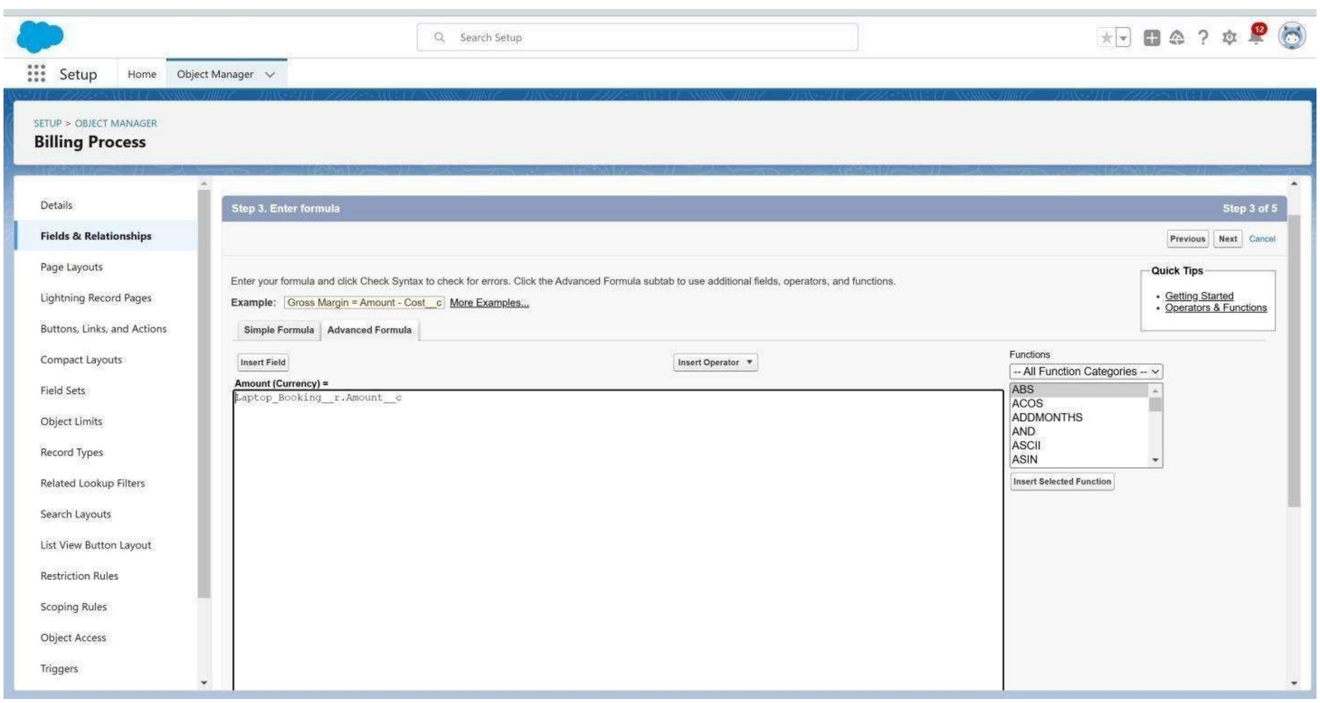
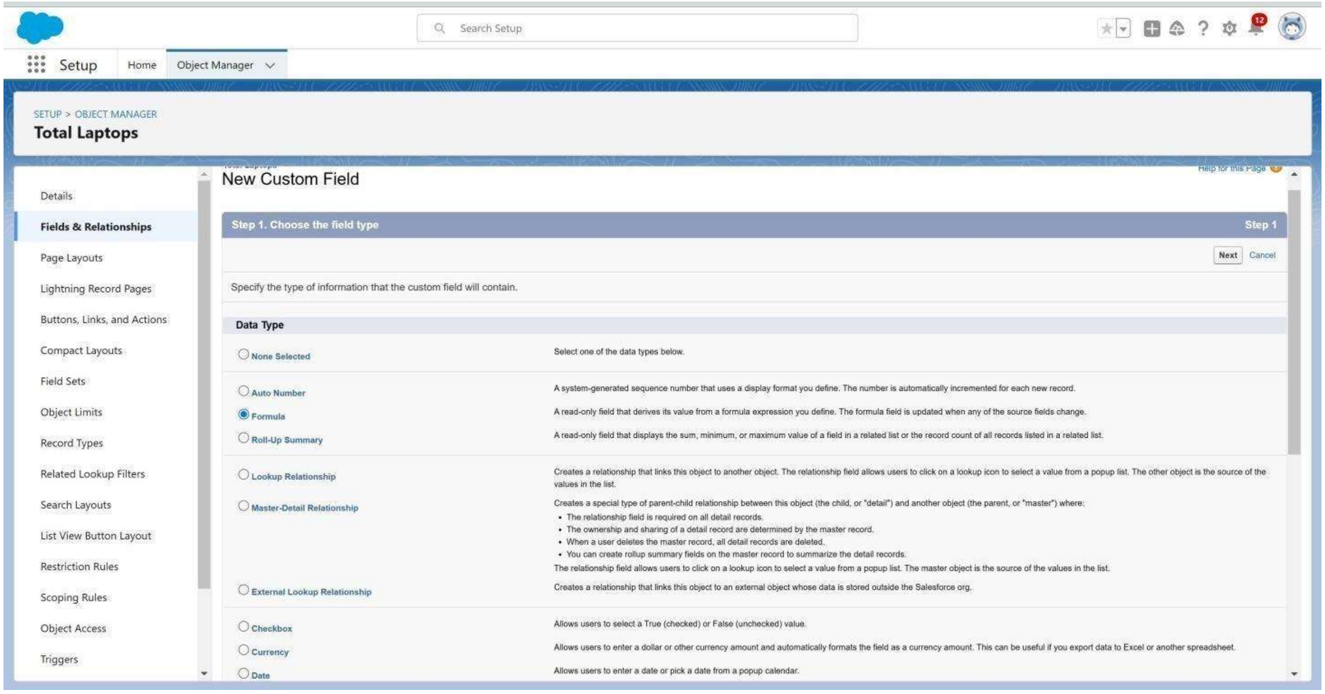
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Triggers
Lookup Relationship
Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
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.
The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.
External Lookup Relationship
Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
Checkbox
Allows users to select a True (checked) or False (unchecked) value.
Currency
Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
Date
Allows users to enter a date or pick a date from a popup calendar.
Date/Time
Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
Email
Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
Geolocation
Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
Number
Allows users to enter any number. Leading zeros are removed.
Percent
Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
Phone
Allows users to enter any phone number. Automatically formats it as a phone number.
Picklist
Allows users to select a value from a list you define.
Picklist (Multi-Select)
Allows users to select multiple values from a list you define.
Text
Allows users to enter any combination of letters and numbers.
Text Area
Allows users to enter up to 255 characters on separate lines.
Text Area (Long)
Allows users to enter up to 131,072 characters on separate lines.
Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.


Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Billing Process
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
Scoping Rules
Object Access
Triggers
Step 2. Enter the details
Step 2 of 4
Previous
Next
Cancel
Field Label
Payment Mode
Values
Use global picklist value set
Enter values, with each value separated by a new line
Check
Credit card
Debit card
UPI
Phonepe
Gpay
Paytm
Display values alphabetically, not in the order entered
Use first value as default value
Restrict picklist to the values defined in the value set
Field Name
Payment_Mode
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


Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Billing Process
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
Scoping Rules
Object Access
Triggers
Step 1. Choose the field type
Step 1
Next
Cancel
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.
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.
The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.
External Lookup Relationship
Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
Checkbox
Allows users to select a True (checked) or False (unchecked) value.
Currency
Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
Date
Allows users to enter a date or pick a date from a popup calendar.
Date/Time
Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
Email
Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.


Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Billing Process
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
Scoping Rules
Object Access
Triggers
Step 2. Choose output type
Step 2 of 5
Previous
Next
Cancel
Field Label
Amount
Field Name
Amount
Auto add to custom report type
Add this field to existing custom report types that contain this entity
Formula Return Type
None Selected
Select one of the data types below.
Checkbox
Calculate a boolean value
Example: TODAY() > CloseDate
Currency
Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: Gross Margin = Amount - Cost__c
Date
Calculate a date, for example, by adding or subtracting days to other dates.
Example: Reminder Date = CloseDate - 7
Date/Time
Calculate a date/time, for example, by adding a number of hours or days to another date/time.
Example: Next = NOW() + 1
Number
Calculate a numeric value.
Example: Fahrenheit = 1.8 * Celsius__c + 32
Percent
Calculate a percent and automatically add the percent sign to the number.
Example: Discount = (Amount - Discounted_Amount__c) / Amount
Text
Create a text string, for example, by concatenating other text fields.
Example: Full Name = LastName & ", " & FirstName
Time
Calculate a time, for example, by adding a number of hours to another time.
Example: Next = TIMEVALUE(NOW()) + 1
Options
Decimal Places 2
Example: 999.00


Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Billing Process
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
Scoping Rules
Object Access
Triggers
Step 3. Enter formula
Step 3 of 5
Previous
Next
Cancel
Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.
Example: Gross Margin = Amount - Cost__c More Examples...
Quick Tips
Getting Started
Operators & Functions
Simple Formula
Advanced Formula
Insert Field
Insert Operator
Functions
-- All Function Categories --
ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN
Insert Selected Function
Amount (Currency) =
Laptop_Booking__r.Amount__c


Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
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
Scoping Rules
Object Access
Triggers
New Custom Field
Step 1. Choose the field type
Step 1
Next
Cancel
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.
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The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.
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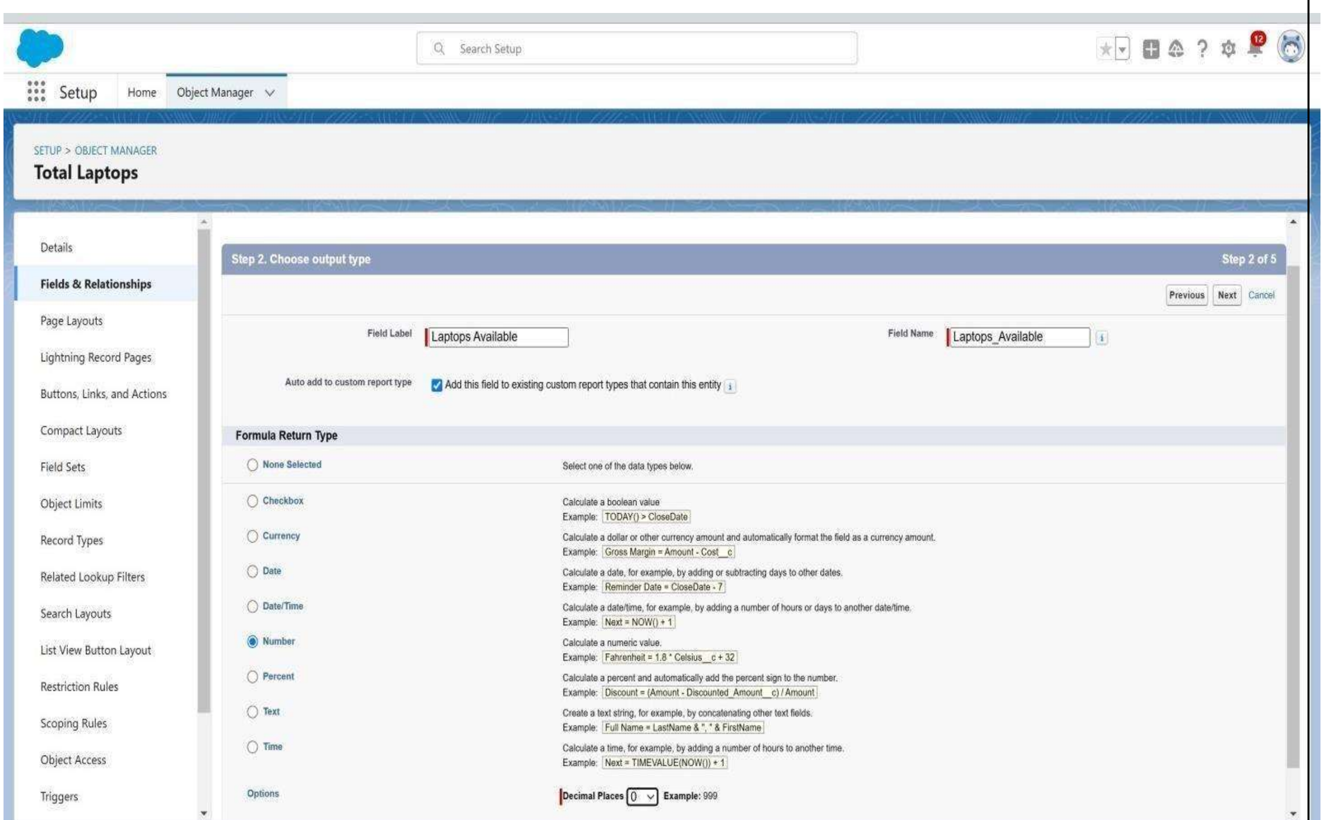
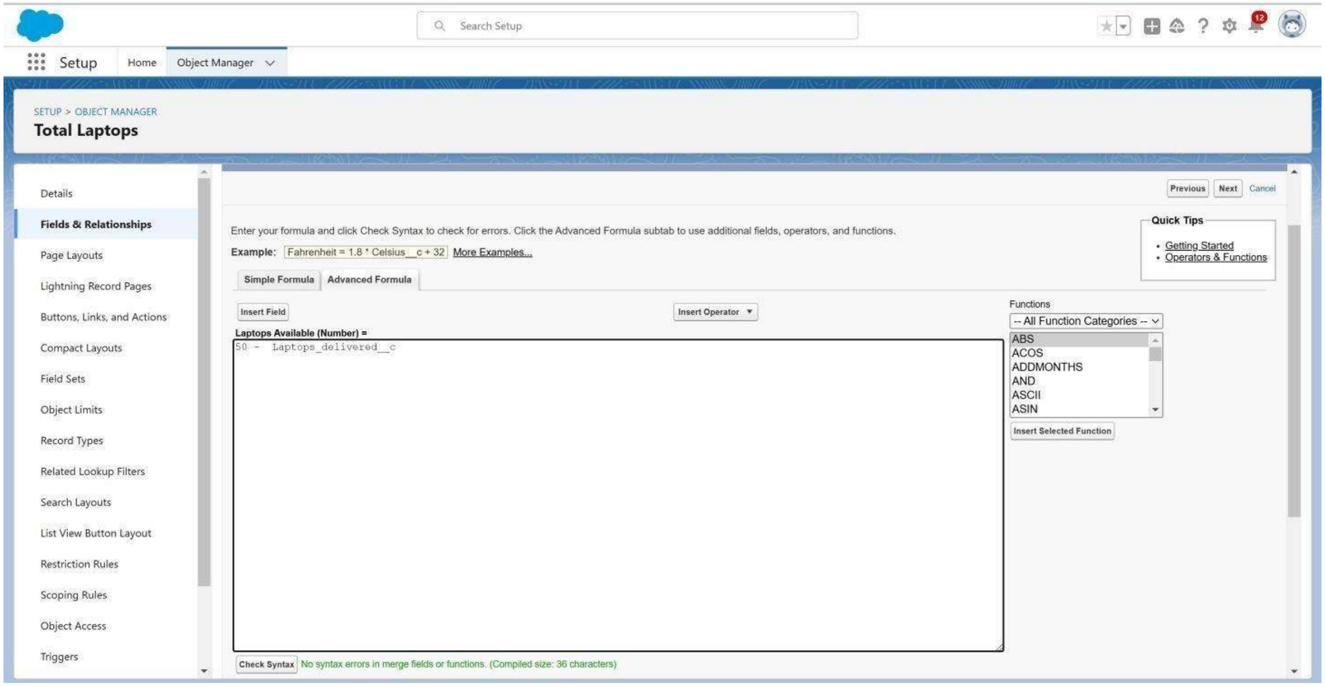
Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
Checkbox
Allows users to select a True (checked) or False (unchecked) value.
Currency
Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
Date
Allows users to enter a date or pick a date from a popup calendar.

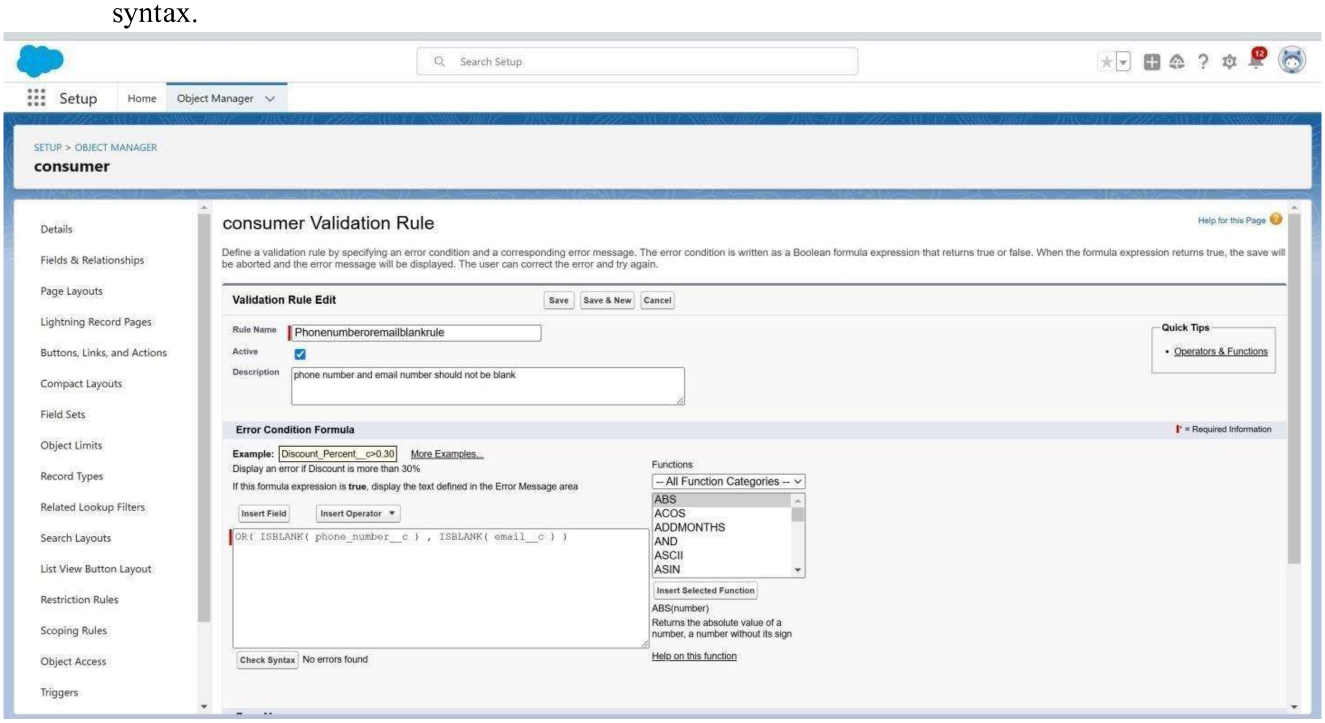

Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Total Laptops
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Triggers
Step 2. Choose output type
Step 2 of 5
Previous
Next
Cancel
Field Label
Laptops Available
Field Name
Laptops_Available
Auto add to custom report type
Add this field to existing custom report types that contain this entity
Formula Return Type
None Selected
Select one of the data types below.
Checkbox
Calculate a boolean value
Example: TODAY() > CloseDate
Currency
Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: Gross Margin = Amount - Cost__c
Date
Calculate a date, for example, by adding or subtracting days to other dates.
Example: Reminder Date = CloseDate - 7
Date/Time
Calculate a date/time, for example, by adding a number of hours or days to another date/time.
Example: Next = NOW() + 1
Number
Calculate a numeric value.
Example: Fahrenheit = 1.8 * Celsius__c + 32
Percent
Calculate a percent and automatically add the percent sign to the number.
Example: Discount = (Amount - Discounted_Amount__c) / Amount
Text
Create a text string, for example, by concatenating other text fields.
Example: Full Name = LastName & ", " & FirstName
Time
Calculate a time, for example, by adding a number of hours to another time.
Example: Next = TIMEVALUE(NOW()) + 1
Options
Decimal Places 0 Example: 999



Creating the validation rule for phone number field in consumer object

Creating the validation rule for phone number field in consumer object

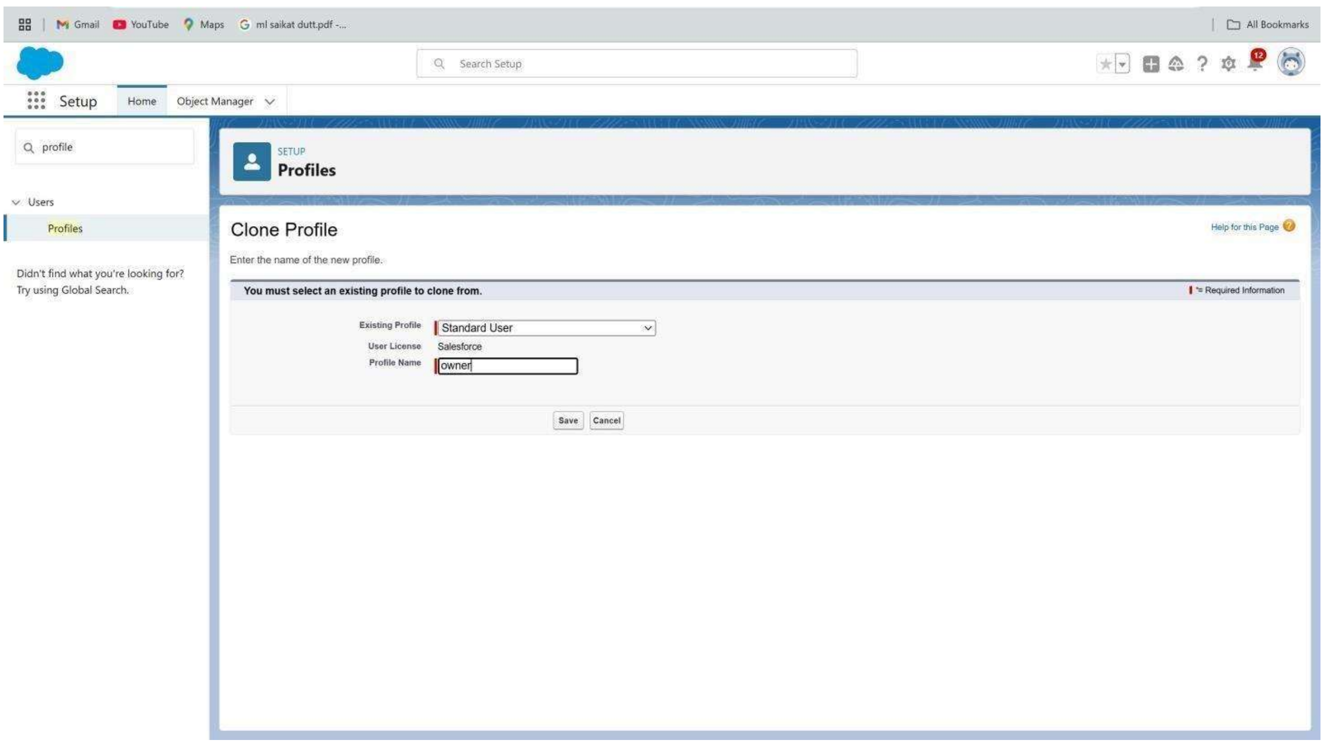
1. Go to the setup page >> click on object manager >> From drop down click edit for consumer object.
2. Click on the validation rule >> click New.
3. Enter the Rule name as "Phonenumberoremailblankrule ".
4. Enter the description as "phone number and email number should not be blank".
5. Enter the formula as "OR(ISBLANK(phone_number_c) , ISBLANK(email_c))" and check the syntax.



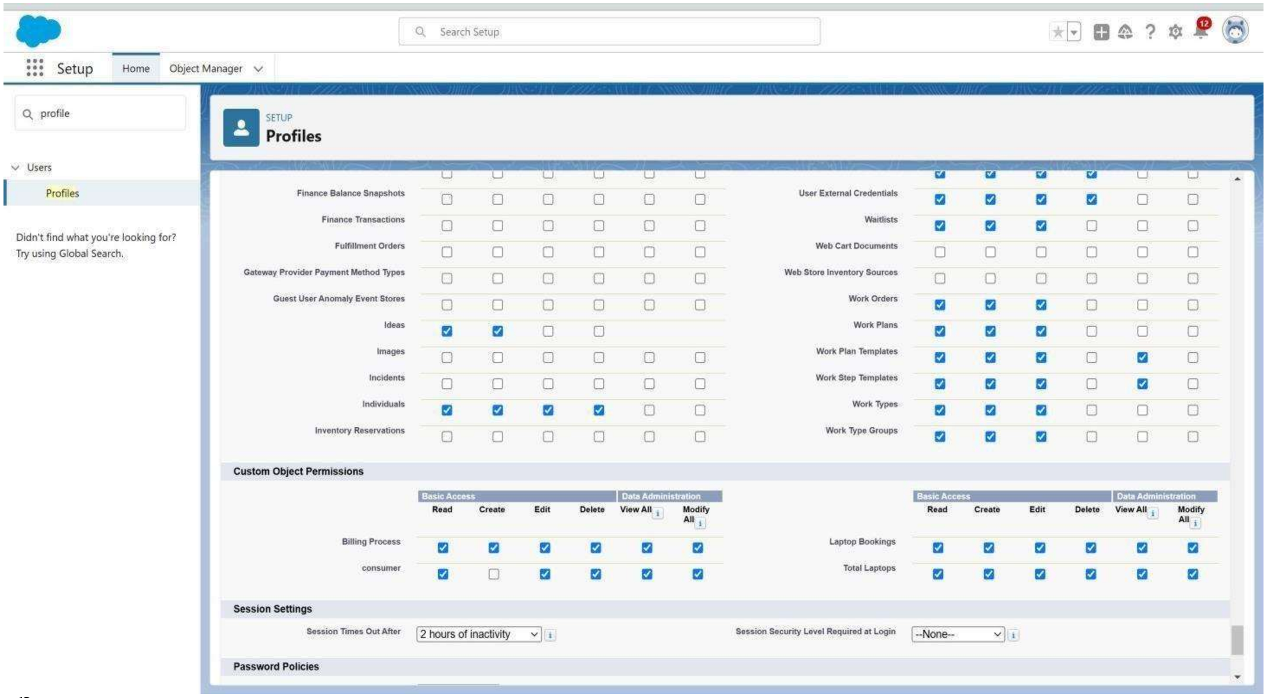
Owner Profile

To create a new profile:

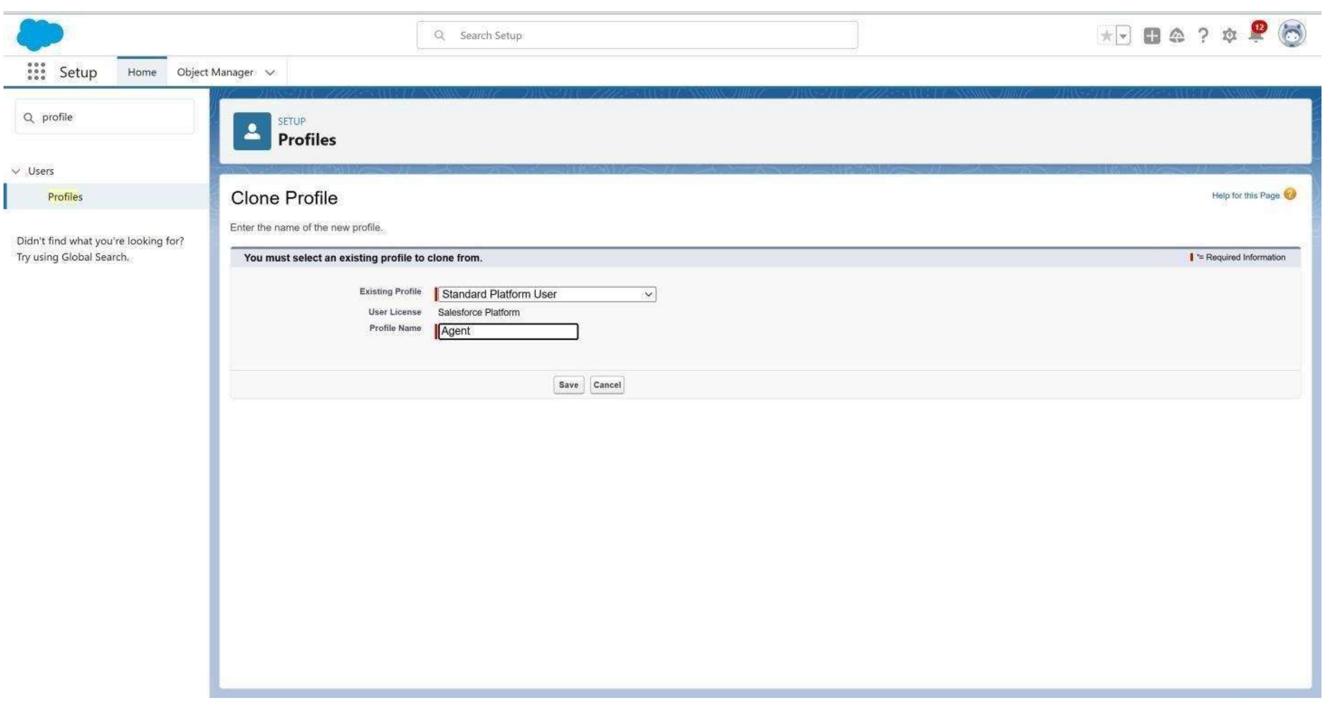
1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Standard User) >> enter profile name (owner) >> Save.
2. Scroll down to Custom Object Permissions and Give access permissions for Total Laptops, consumers , Laptop Booking and Billing Process objects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

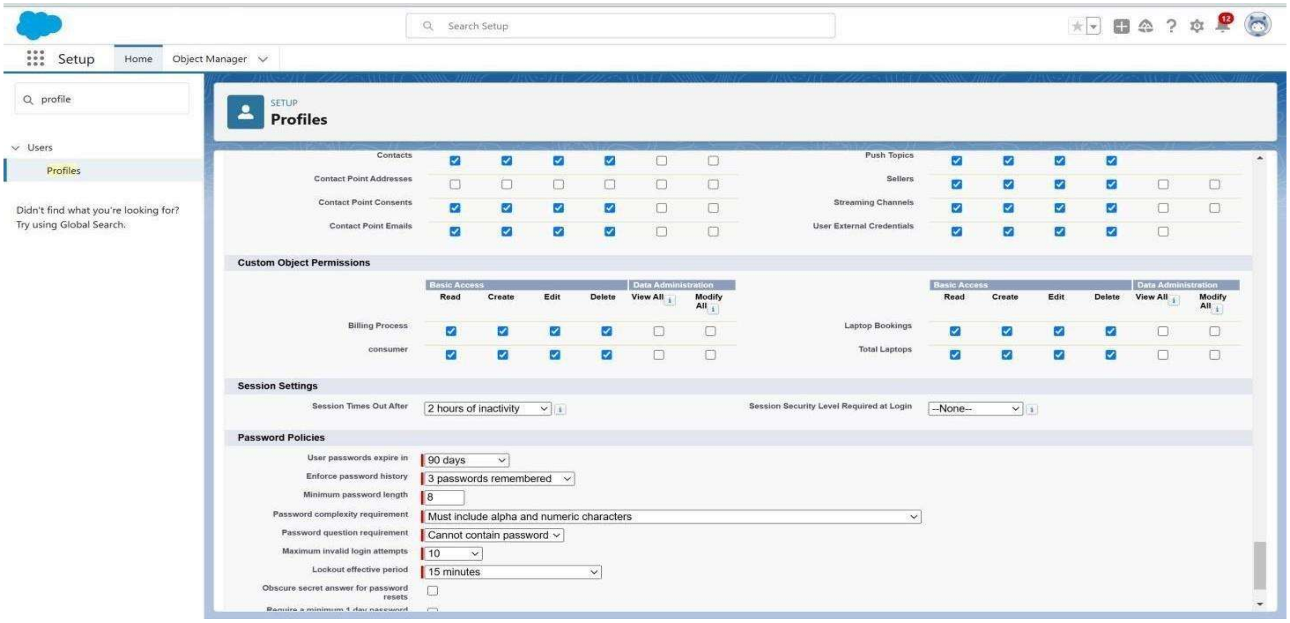


Agent Profile



1. p
   >> 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
4. , Laptop Bookings and Billing Process objects as mentioned in the below diagram.
5. Give access and save it.





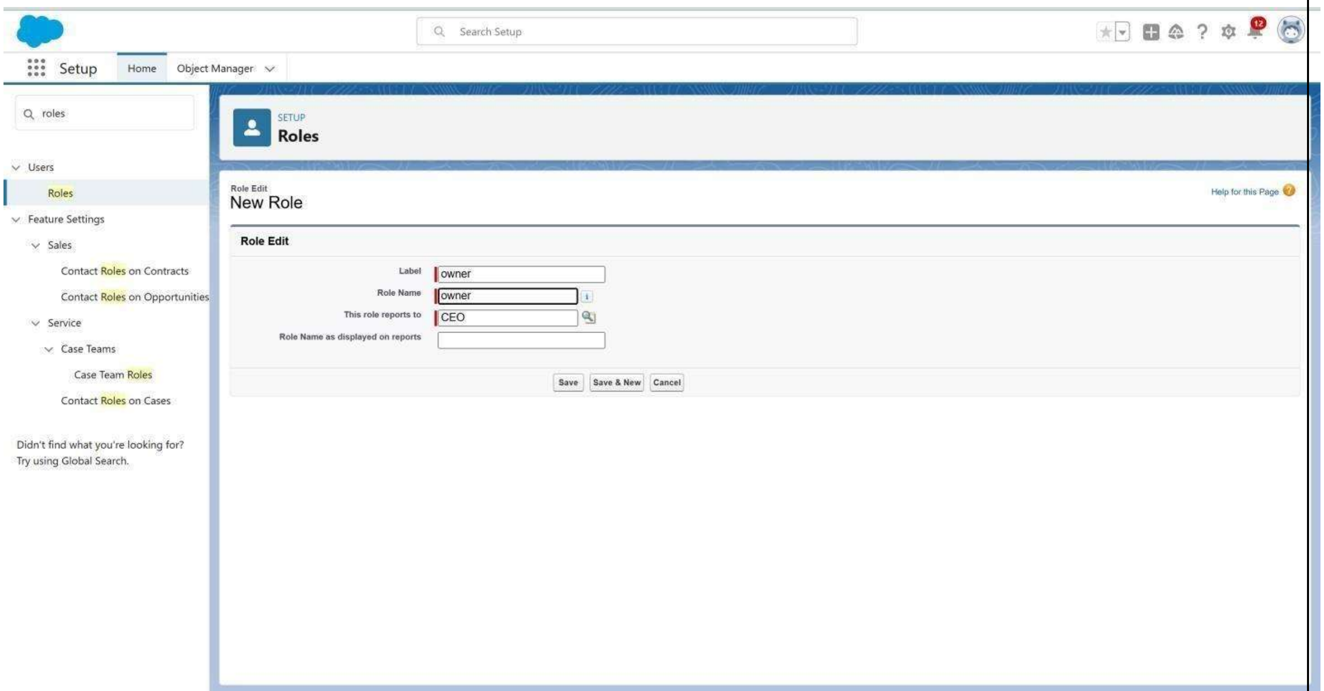
Creating owner Role:

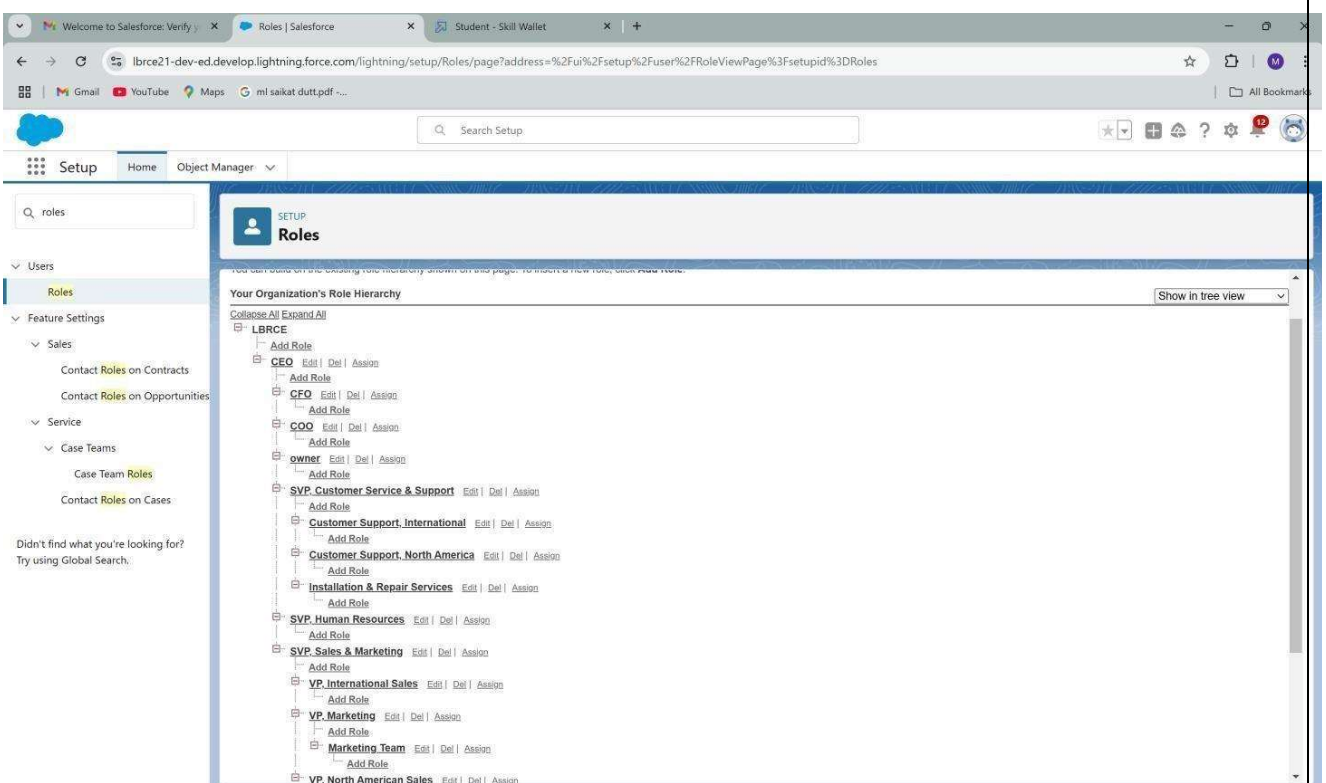
1. Go to quick find >> Search for Roles >> click on set up roles.
2. Click on Expand All and click on add role under whom this role works.
3. Give Label as “owner” and Role name gets auto populated. Then click on Save.
4. Click and save it.

Activity 2: Creating Agent roles

Creating another two roles under Owner

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.


Search Setup
Setup
Home
Object Manager
roles
Users
Roles
Feature Settings
Sales
Contact Roles on Contracts
Contact Roles on Opportunities
Service
Case Teams
Case Team Roles
Contact Roles on Cases
Didn't find what you're looking for?
Try using Global Search.
SETUP
Roles
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


Welcome to Salesforce: Verify
Roles | Salesforce
Student - Skill Wallet
lbrce21-dev-ed.develop.lightning.force.com/lightning/setup/Roles/page?address=%2Fui%2Fsetup%2Fuser%2FRoleViewPage%3Fsetupid%3DRoles
Gmail
YouTube
Maps
ml saikat dutt.pdf -...
All Bookmarks
Search Setup
Setup
Home
Object Manager
roles
Users
Roles
Feature Settings
Sales
Contact Roles on Contracts
Contact Roles on Opportunities
Service
Case Teams
Case Team Roles
Contact Roles on Cases
Didn't find what you're looking for?
Try using Global Search.
SETUP
Roles
Your Organization's Role Hierarchy
Show in tree view
Collapse All Expand All
LBRCE
Add Role
CEO Edit | Del | Assign
Add Role
CFO Edit | Del | Assign
Add Role
COO Edit | Del | Assign
Add Role
owner Edit | Del | Assign
Add Role
SVP, Customer Service & Support Edit | Del | Assign
Add Role
Customer Support, International Edit | Del | Assign
Add Role
Customer Support, North America Edit | Del | Assign
Add Role
Installation & Repair Services Edit | Del | Assign
Add Role
SVP, Human Resources Edit | Del | Assign
Add Role
SVP, Sales & Marketing Edit | Del | Assign
Add Role
VP, International Sales Edit | Del | Assign
Add Role
VP, Marketing Edit | Del | Assign
Add Role
Marketing Team Edit | Del | Assign
Add Role
VP, North American Sales Edit | Del | Assign

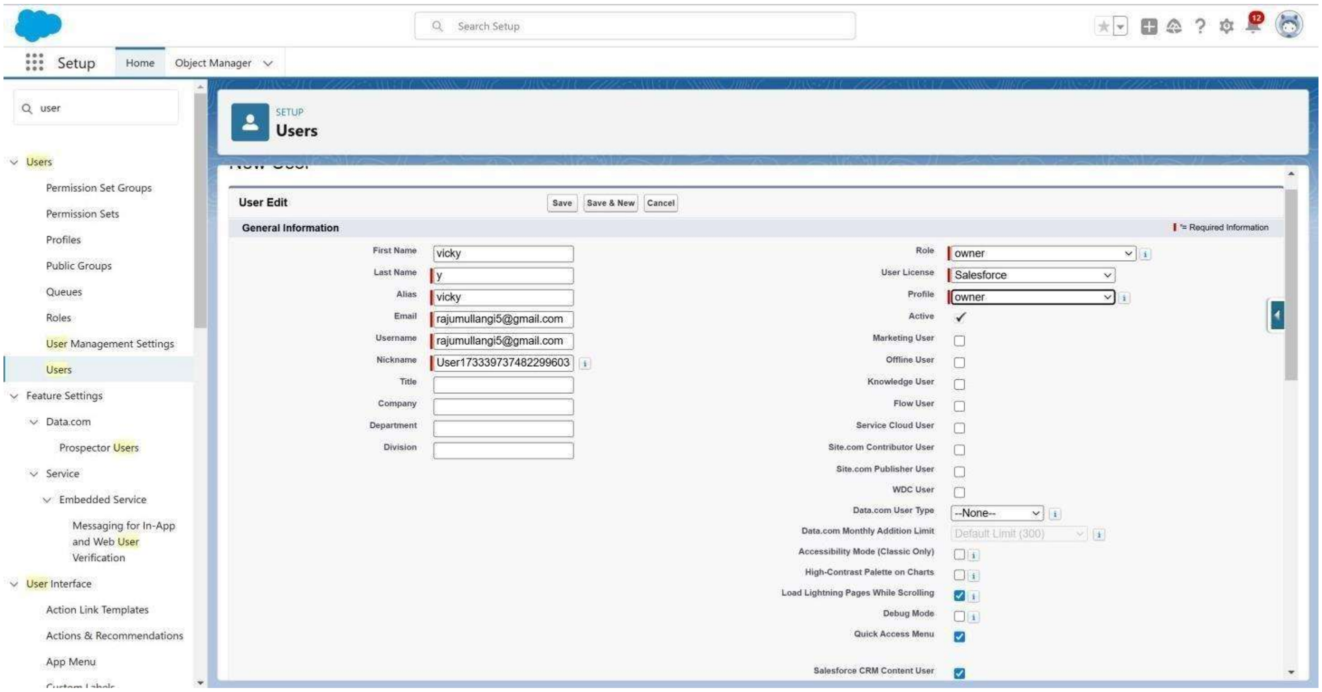
Create User

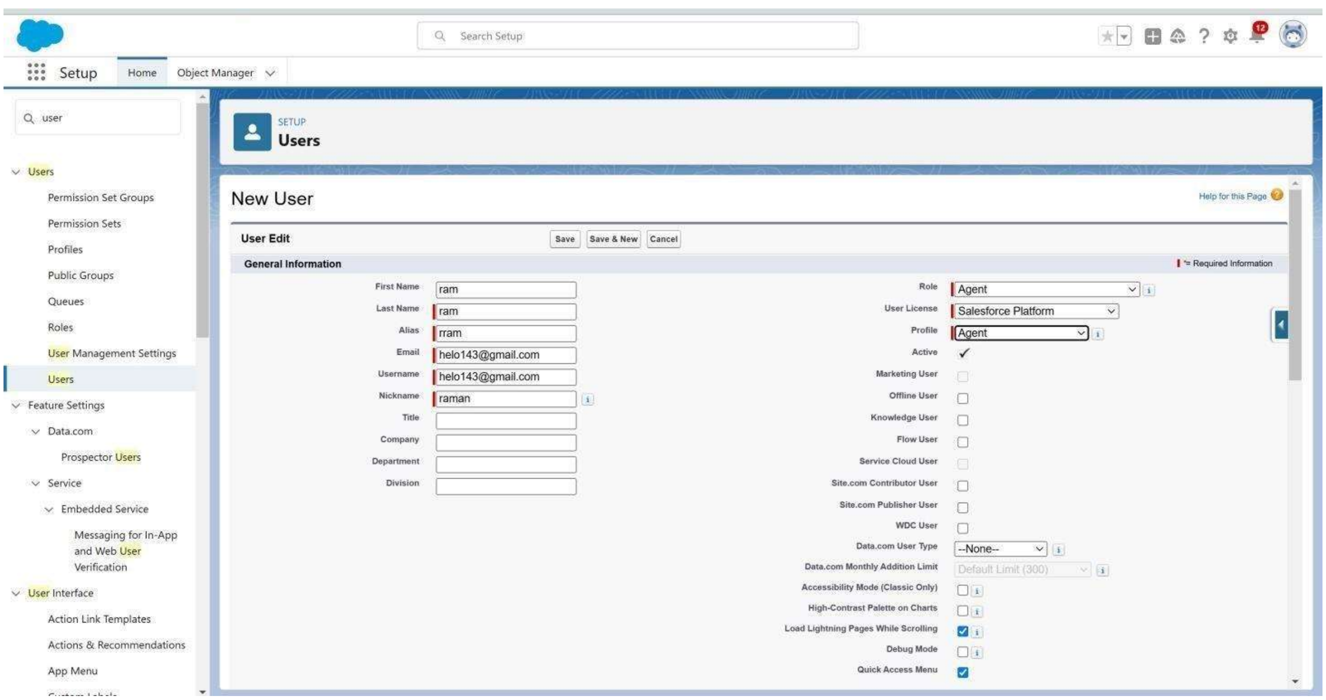
Activity 1: Creating User

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 : Agent.
12. Save it.


Search Setup
Setup
Home
Object Manager
user
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
Service
Embedded Service
Messaging for In-App and Web User Verification
User Interface
Action Link Templates
Actions & Recommendations
App Menu
SETUP
Users
User Edit
Save
Save & New
Cancel
General Information
= Required Information
First Name vicky
Last Name y
Alias vicky
Email rajumullangi5@gmail.com
Username rajumullangi5@gmail.com
Nickname User17339737482299603
Title
Company
Department
Division
Role owner
User License Salesforce
Profile owner
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)
Accessibility Mode (Classic Only)
High-Contrast Palette on Charts
Load Lightning Pages While Scrolling
Debug Mode
Quick Access Menu
Salesforce CRM Content User


Search Setup
Setup
Home
Object Manager
user
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
Service
Embedded Service
Messaging for In-App and Web User Verification
User Interface
Action Link Templates
Actions & Recommendations
App Menu
SETUP
Users
New User
Help for this Page
User Edit
Save
Save & New
Cancel
General Information
= Required Information
First Name ram
Last Name ram
Alias rram
Email helo143@gmail.com
Username helo143@gmail.com
Nickname raman
Title
Company
Department
Division
Role Agent
User License Salesforce Platform
Profile Agent
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)
Accessibility Mode (Classic Only)
High-Contrast Palette on Charts
Load Lightning Pages While Scrolling
Debug Mode
Quick Access Menu

Flows

Create a Flow on dell laptop

Activity - 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.
    1. Resource: Select $Record.Laptop_name_c.
    2. Operator: Select Equals.
    3. Value: Select dell
    4. Add the same outcome order to acer , hp, mac. 5. Rename Default outcome as False
    6. Click done.
9. Go to flow page
10. Beside dell there is a symbol ‘+’ click on that.
11. Again select decision
12. Enter the Details Label: Field should Update(any one u want), API name: Gets Automatically Generated.
13. select the Outcome Details Label: dell core i3 , Outcome API name: Gets Automatically Generated.
    1. Resource: Select {!$Record.core_type_c}.
    2. Operator: Select Equals.
    3. Value: Select core i3.
    4. Then again click the symbol ‘+’ outcome details
14. select the Outcome ‘+’ Details Label: dell core i5 , Outcome API name: Gets Automatically Generated.

- ☐ Resource: Select Record.core type.
- ☐ Operator: Select Equals.
- ☐ Value: Select core i5.
- ☐ Then again click the symbol’+’ outcome details

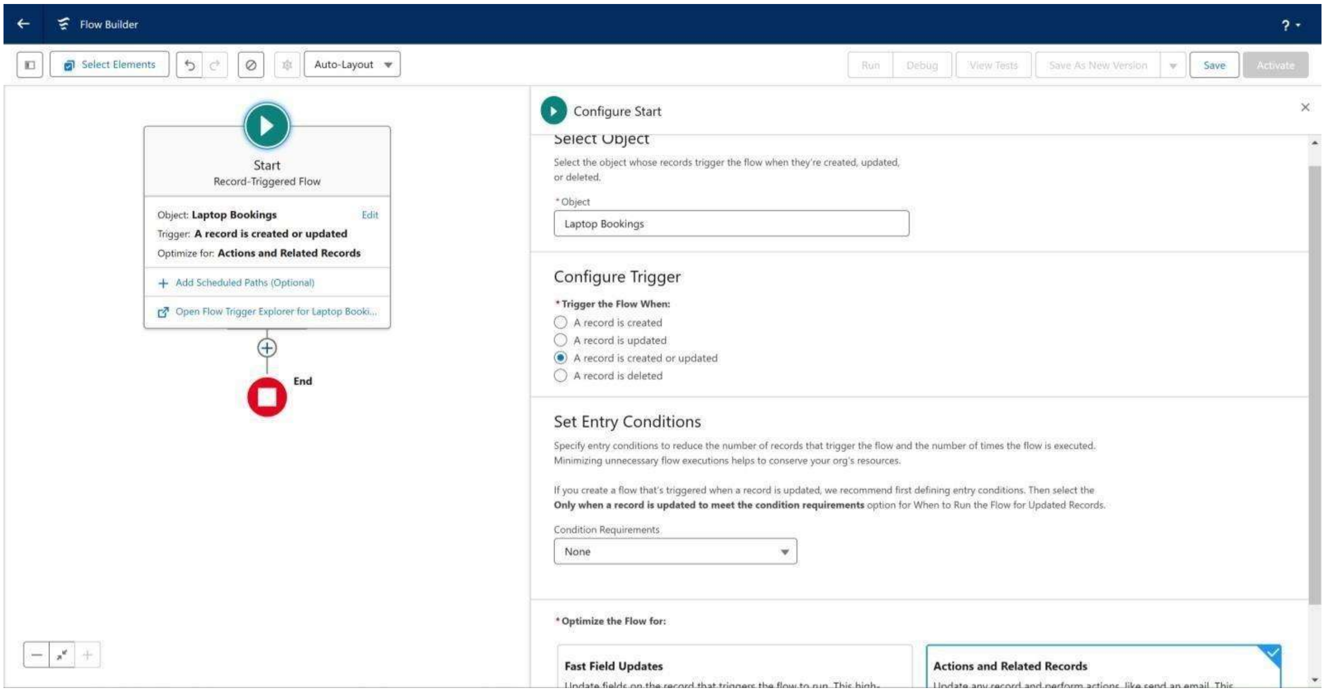
15. Enter the Outcome Details Label: dell core i7 , Outcome API name: Gets Automatically Generated.
    - ☐ Resource: Select Record.core type.
    - ☐ Operator: Select Equals.
    - ☐ Value: Select core i7.
16. Click done.
17. Repeat the same process for Acer, HP a

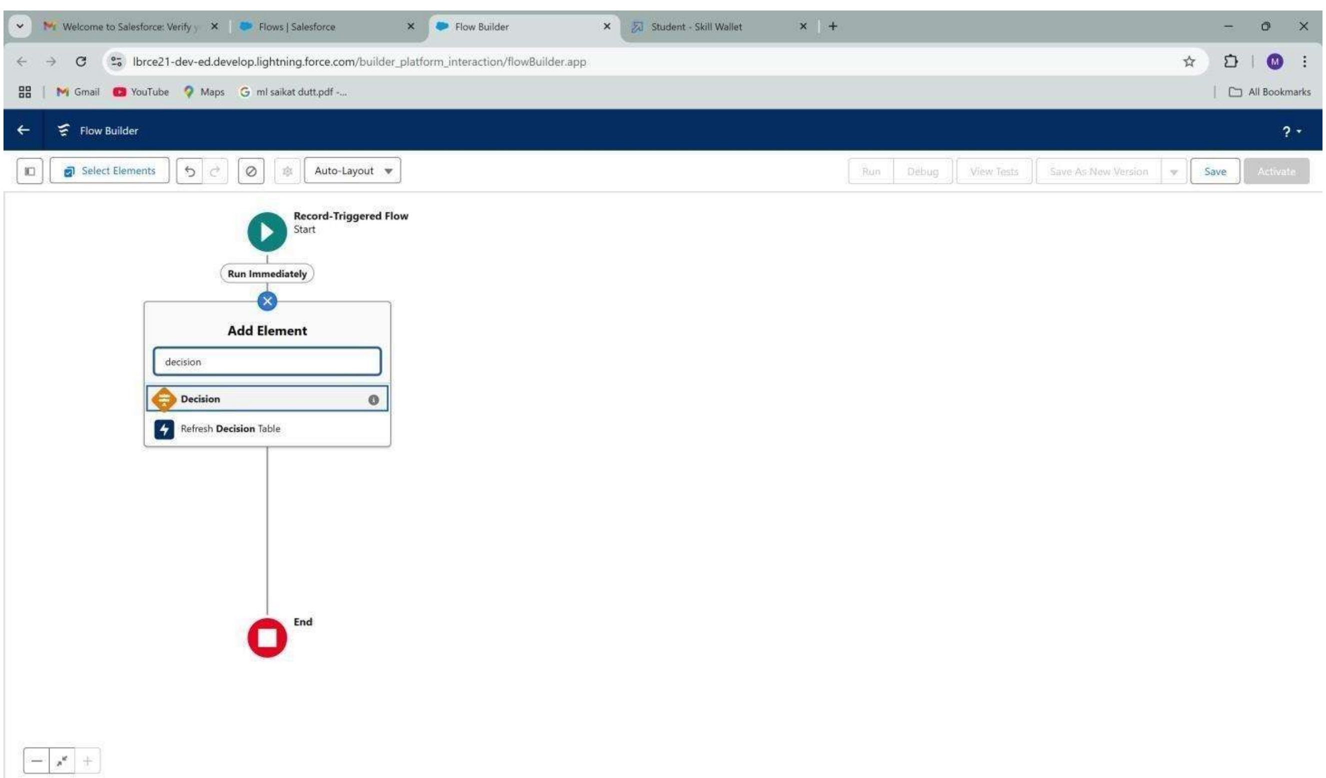
    Mac Then,

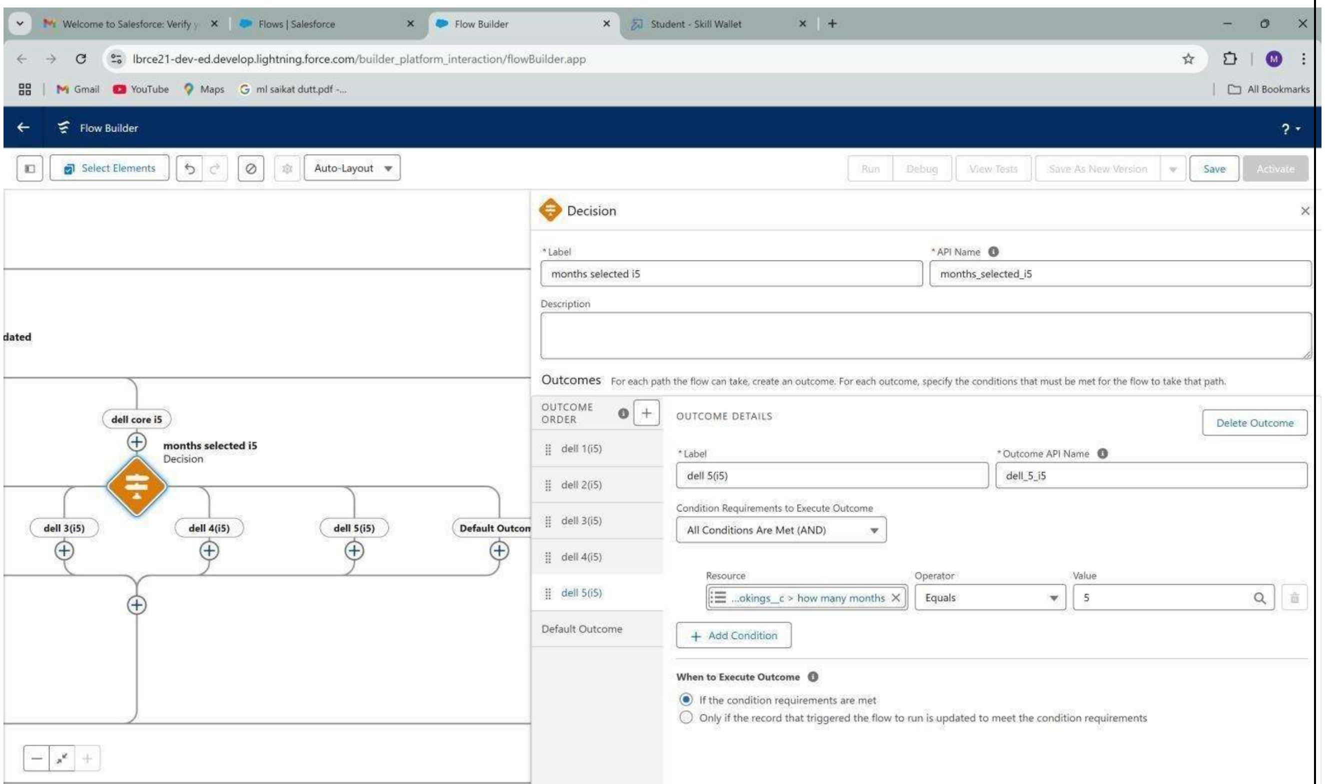
18. Click on save .
19. Label: Laptop distributions, api name:- automatically filled

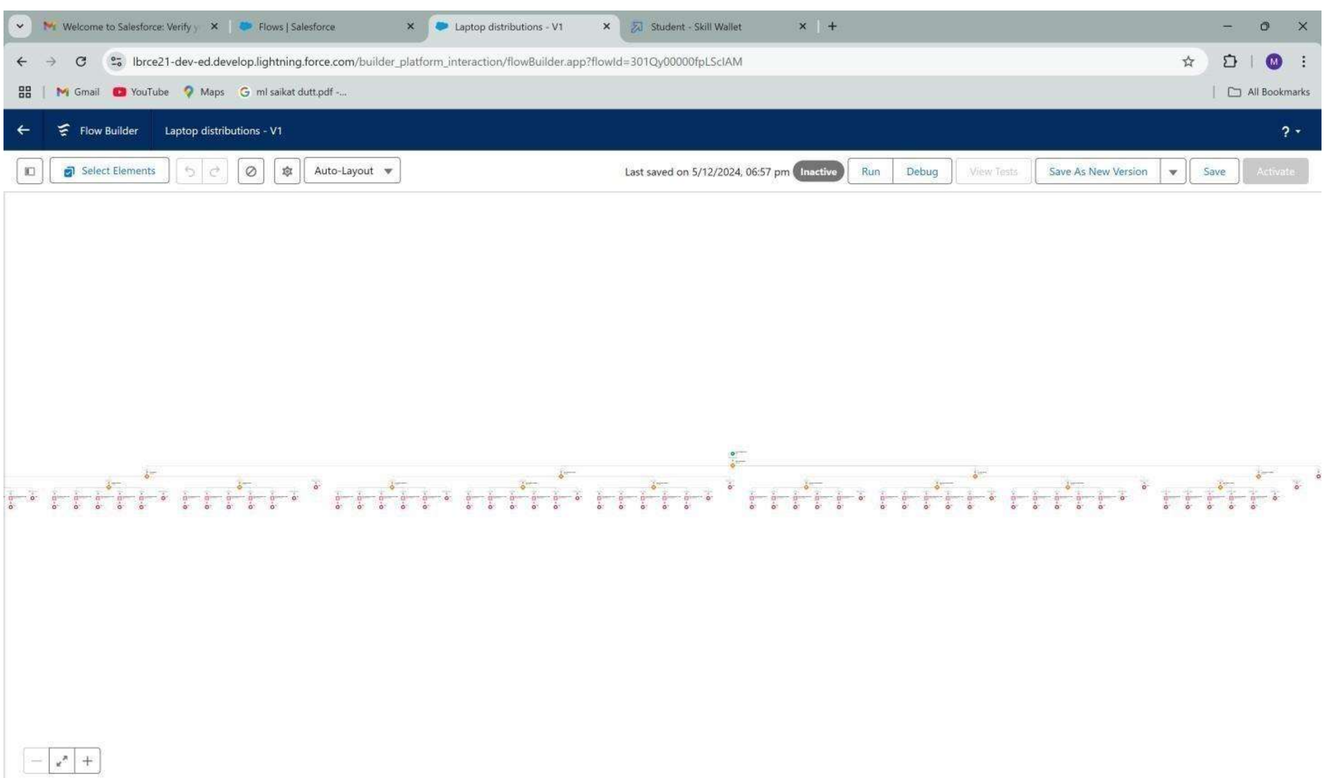
20.Save the flow and activate it.

1.






Welcome to Salesforce: Verify y
Flows | Salesforce
Flow Builder
Student - Skill Wallet
lbrce21-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app
Gmail
YouTube
Maps
ml saikat dutt.pdf -...
All Bookmarks
Flow Builder
Select Elements
Auto-Layout
Run
Debug
View Tests
Save As New Version
Save
Activate
Decision
* Label
months selected i5
* API Name
months_selected_i5
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
dell 1(i5)
dell 2(i5)
dell 3(i5)
dell 4(i5)
dell 5(i5)
Default Outcome
OUTCOME DETAILS
Delete Outcome
* Label
dell 5(i5)
* Outcome API Name
dell_5_i5
Condition Requirements to Execute Outcome
All Conditions Are Met (AND)
Resource
...okings__c > how many months
Operator
Equals
Value
5
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
dated
dell core i5
months selected i5
Decision
dell 3(i5)
dell 4(i5)
dell 5(i5)
Default Outcom


Welcome to Salesforce: Verify y
Flows | Salesforce
Laptop distributions - V1
Student - Skill Wallet
lbrce21-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=301Qy00000fpLScIAM
Gmail
YouTube
Maps
ml saikat dutt.pdf -...
All Bookmarks
Flow Builder
Laptop distributions - V1
Select Elements
Auto-Layout
Last saved on 5/12/2024, 06:57 pm
Inactive
Run
Debug
View Tests
Save As New Version
Save
Activate

Apex Trigger and Handler Class

How to create a new trigger :

1. 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.

Syntax For creating trigger :

The syntax for creating trigger is :

Trigger [trigger name] on [object name](Before/After event)

{

}

Trigger Code:

trigger LaptopBooking on Laptop_Bookings_c (After insert,after update) {

if(trigger.isAfter && (trigger.isInsert || trigger.isupdate))

{

LaptopBookingHandler.sendEmailNotification(trigger.new);}}

Note:- copy the API names

1.LaptopBooking - trigger name

2.Laptop_Bookings_c -as per your org(go to laptop bookings object and copy from that object api

name). **Code Snippet :** public class LaptopBookingHandler { public static void

sendEmailNotification (List<Laptop_Bookings_c> lapList){ for(Laptop_Bookings_c lap:lapList)

{

Messaging.SingleEmailMessage email = new

Messaging.SingleEmailMessage(); email.setToAddresses(new

List<String>{lap.Email_c}); email.setSubject('Welcome to our

company');

string body = 'Dear Customer, \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_type_c +' \n Laptop type = '+lap.Laptop_name_c;
email.setPlainTextBody(body);

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

        }

    }

}
```

Note:-

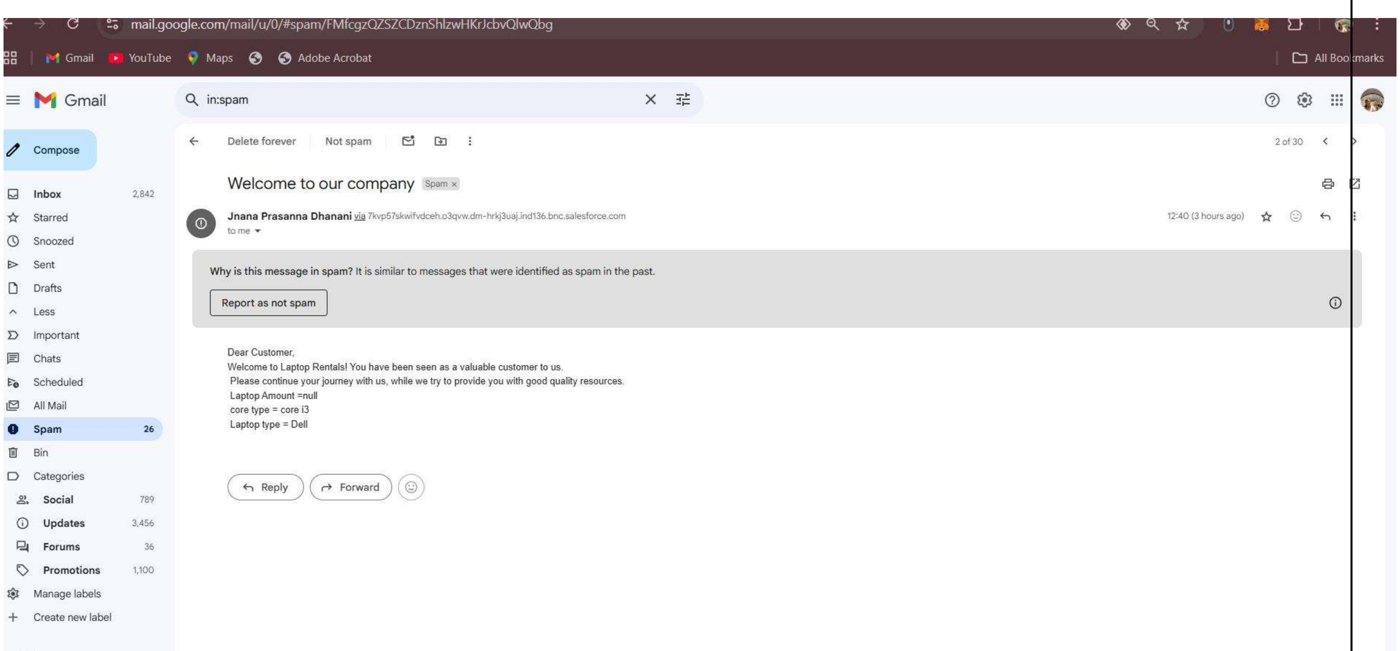
1. Class name:- LaptopBookingHandler

2. API Name:- Laptop_Bookings_c(as per your org go to laptop booking object and copy from that).
3. 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.

Result :



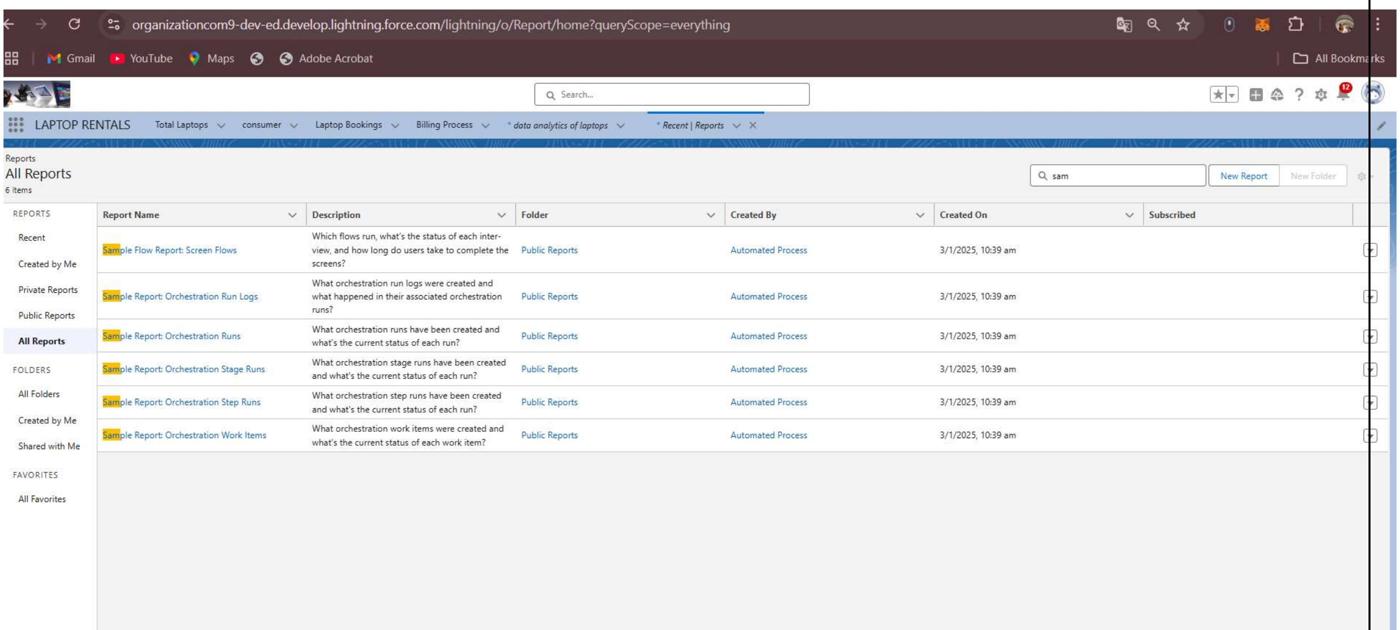
Create Report

1. Note: Before creating reports just fill the 10-12 records in the Laptop Bookings object.

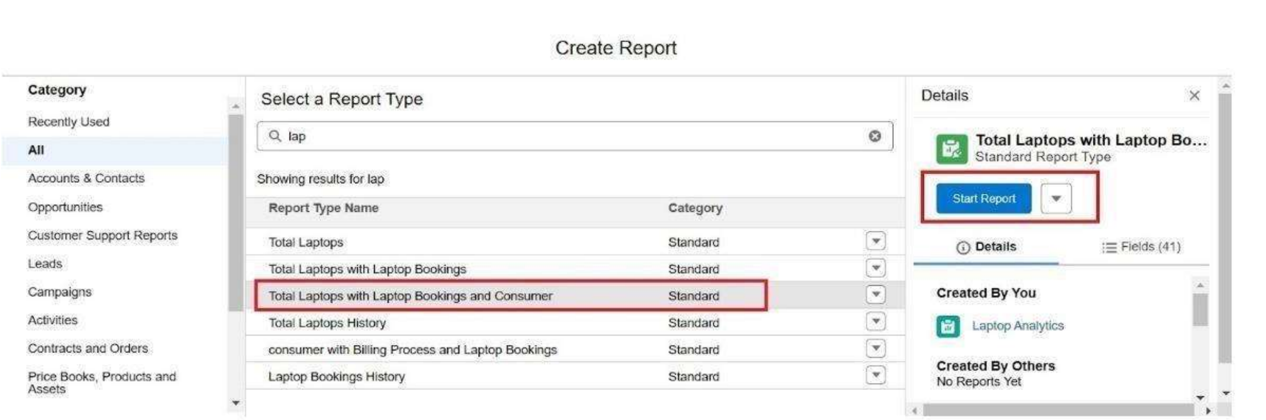
Create records for each one you have to create at least 2 different records i.e dell(i3), dell(i7),acer(i3),hp(i5),mac(bionic chip).

1. Go to the app ? click on the reports tab

2. Click New Report.



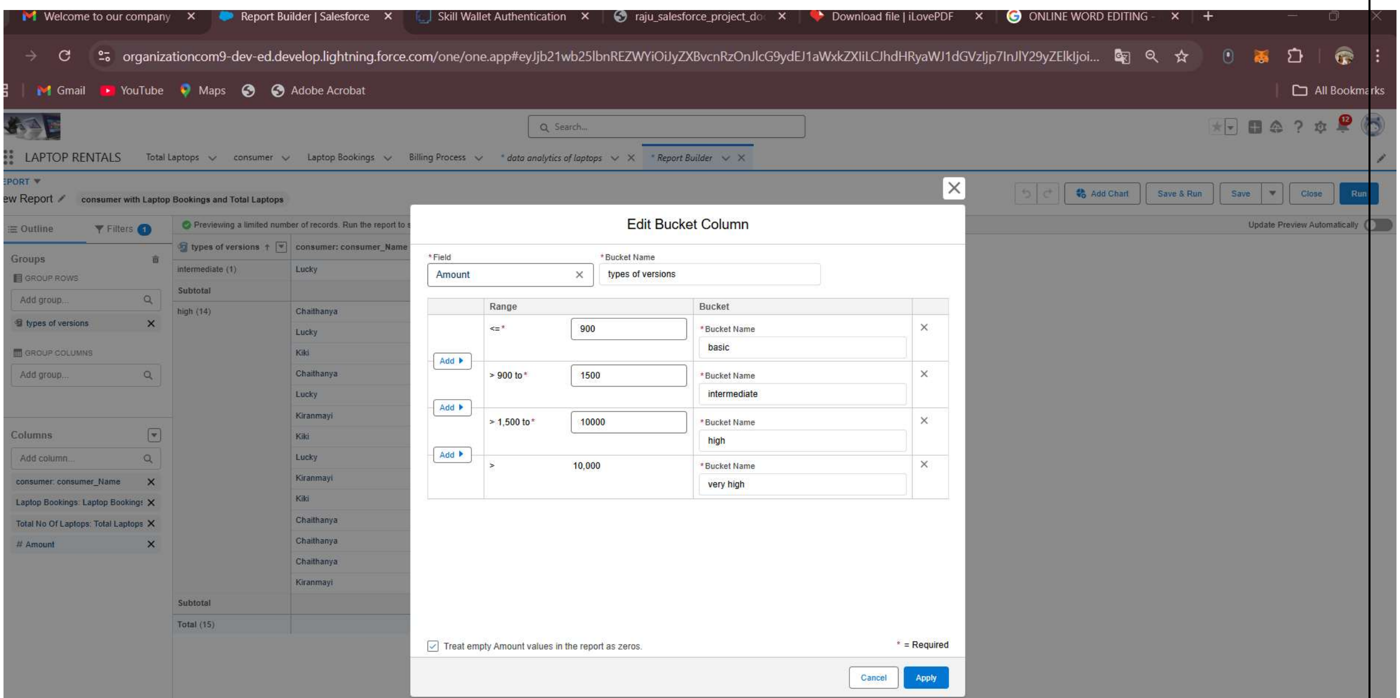
3.Select report type from category or from report type panel or from search panel “consumer with Laptop Bookings and total laptops” ? click on start report.



4. Create a simple tabular report

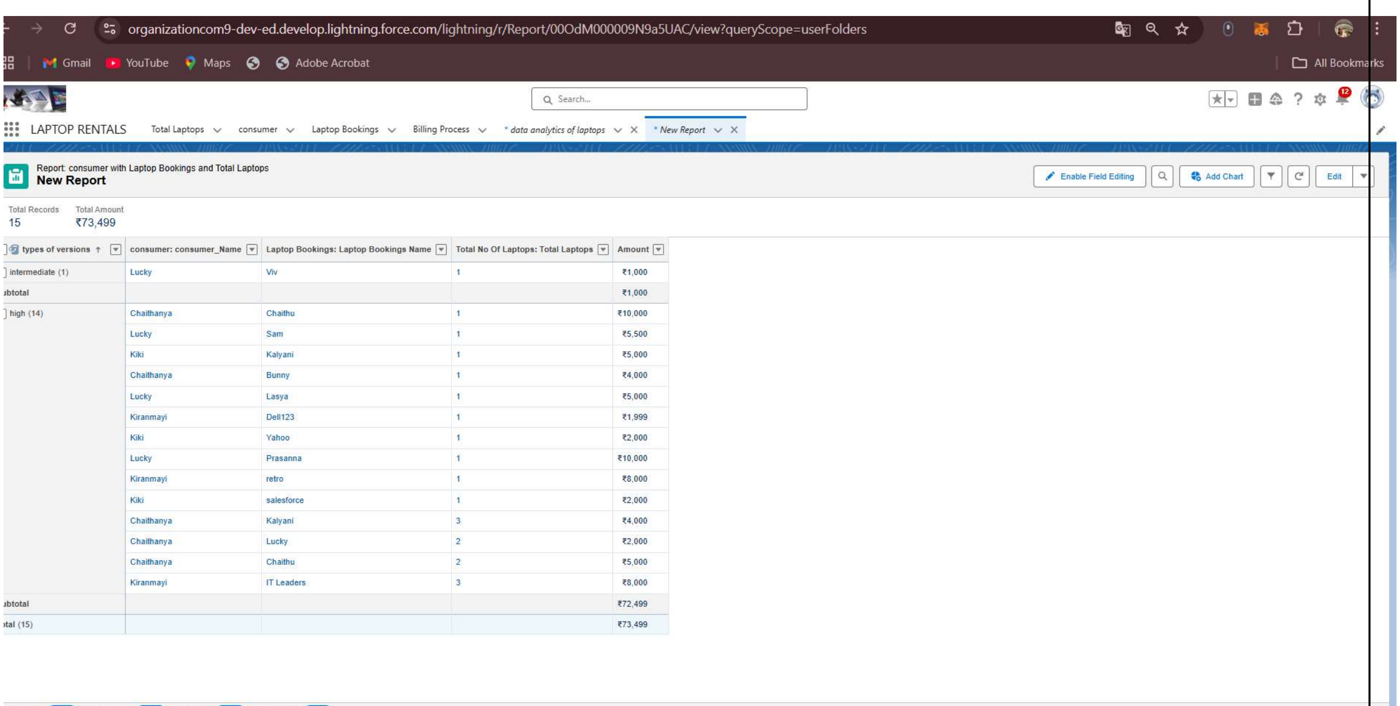
5.Add fields from left pane, make sure that Amount field will be selected.

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



Click apply it.

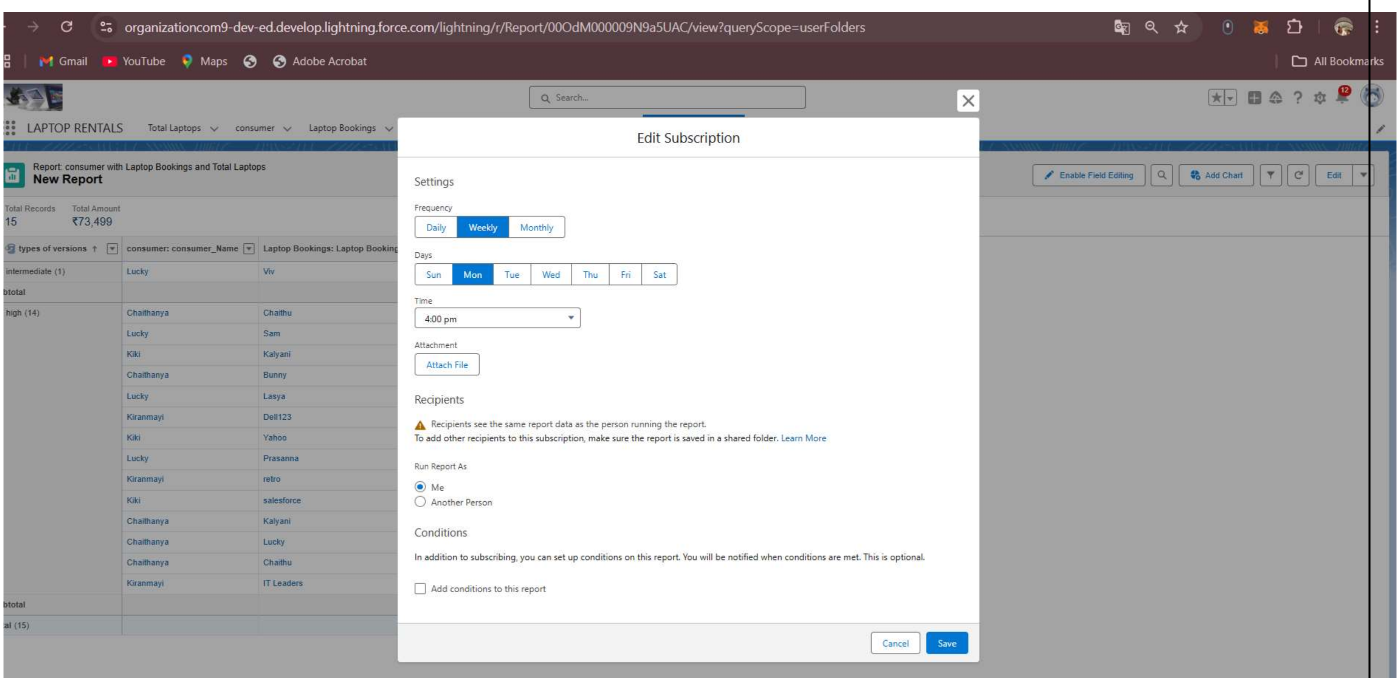
8. Select Types of version in Group By Rows to create **a summary report**. Follow the image for other fields.



Click on Save & run it.

Sharing report to owner

1. Click edit drop down and select subscribe option
2. Follow as per below image.
3. After selecting the run report as a “another person” select your personal account or whom you want to send that mail to.
4. Click save.
5.
6. NOTE: The owner gets daily email notification of that laptop booking report.so that he can see all data remotely.

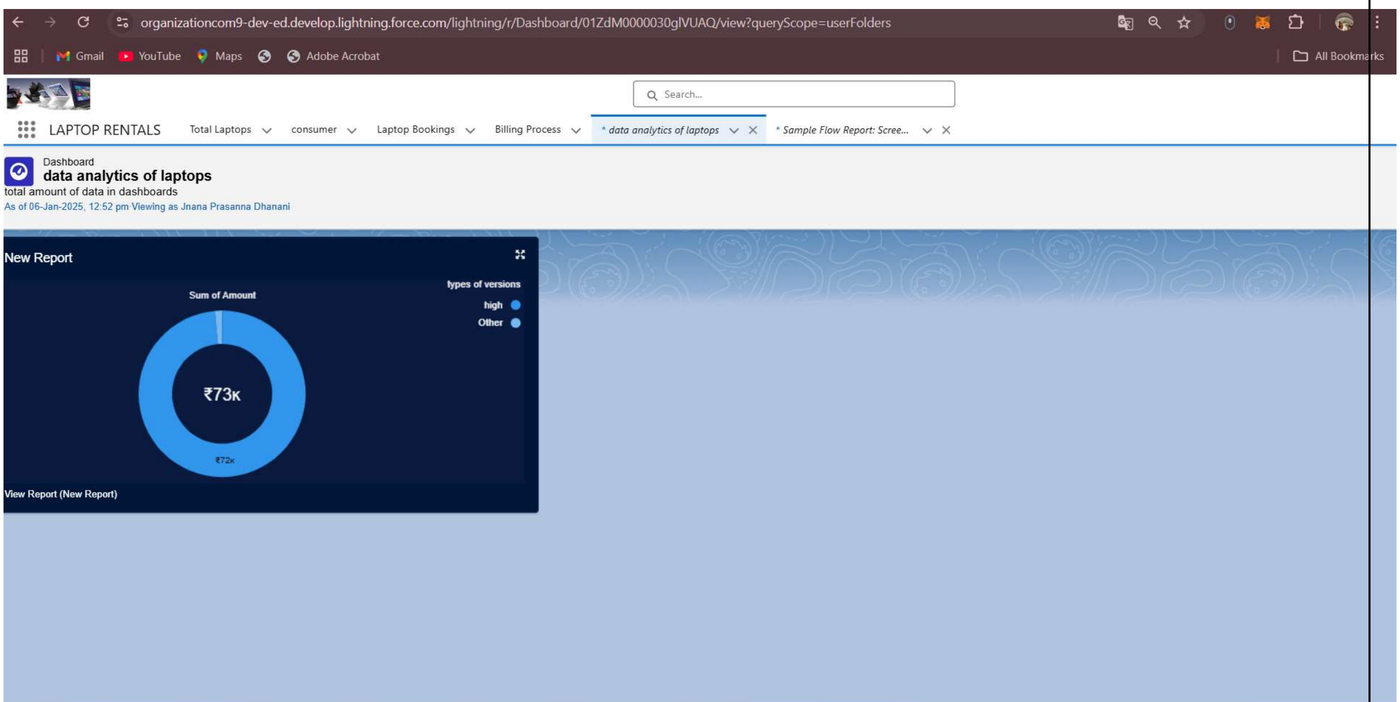


Create Dashboard Folder

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.



Conclusion

The Laptop Rental System demonstrates how Salesforce can be effectively utilized to create a scalable and efficient rental platform. With its robust features and user-centric design, the system is well-suited to meet the growing demand for laptop rentals while providing valuable insights to service providers. Future enhancements may include AI-driven recommendations and blockchain-based contract management.

THE END