

A CRM APPLICATION FOR LAPTOP RENTALS

NAME: Dhanani Jnana Prasanna

COLLEGE: LBRCE

MAIL: prasannadhananigmail.com

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.

The screenshot shows the 'Edit Custom Object' interface for creating a new custom object named 'Total Laptops'. The 'Custom Object Information' section includes fields for 'Label' (Total Laptops) and 'Plural Label' (Total Laptops). The 'Record Name' section shows 'Object Name' (Total_Laptops) and 'Description' (empty). Under 'Content Name', there are two radio buttons: 'Open the standard Salesforce.com Help & Training window' (selected) and 'Open a window using a Visualforce page'. The 'Record Name Label and Format' section shows 'Record Name' (Total Laptops) and 'Data Type' (Text). A warning message at the bottom right states: 'Warning: If you plan to insert a high volume of records in this object, via the API for example, consider using a trigger or flow to handle the insertion logic.' The browser's address bar shows the URL for the Salesforce setup page.

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.

The screenshot shows the 'Edit Custom Object' page for a custom object named 'consumer'. The 'Custom Object Information' section includes fields for 'Label' (set to 'consumer') and 'Plural Label' (set to 'consumer'). There is also a checkbox for 'Starts with vowel sound'. The 'Record Name' section shows 'Object Name' set to 'consumer'. The 'Optional Features' section has checkboxes for 'Allow Reports' and 'Allow Activities' both checked. Other sections visible include 'Enter Record Name Label and Format' and 'Context-Sensitive Help Setting'.

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

The screenshot shows the 'Edit Custom Object' interface for the 'Laptop Bookings' object. On the left, there's a sidebar with various tabs like Details, Fields & Relationships, Page Layouts, etc. The main area has tabs for 'Custom Object Definition Edit' and 'Custom Object Information'. In 'Custom Object Information', the 'Label' field is set to 'Laptop Bookings' and the 'Plural Label' field is also set to 'Laptop Bookings'. There's a checkbox for 'Starts with vowel sound' which is unchecked. The 'Object Name' field is set to 'Laptop_Bookings' and the 'Example' field is 'Account'. A 'Description' text area is present. Below it, under 'Context-Sensitive Help Setting', there are two radio buttons: 'Open the standard Salesforce.com Help & Training window' (selected) and 'Open a window using a Visualforce page'. The 'Content Name' dropdown is set to 'None'. At the bottom, there's a section for 'Enter Record Name Label and Format' with a note about Record Name appearing in various contexts. The 'Record Name' field is set to 'Laptop Bookings Name' and the 'Example' field is 'Account Name'. The 'Data Type' is set to 'Text'. A warning message about high volume insertions via API is shown. Finally, there's an 'Optional Features' section with checkboxes for 'Allow Reports' (checked), 'Allow Activities' (unchecked), 'Track Field History' (checked), 'Allow in Chatter Groups' (unchecked), and 'Enable Licensing' (unchecked).

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.

Billing Process

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports. Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label: Billing Process **Example:** Account

Plural Label: Billing Process **Example:** Accounts

Object Name: Billing_Process **Example:** Account

Description: [Empty text area]

Record Name: BillingProcessName **Example:** Account Name

Content Name: [None]

Context-Sensitive Help Setting: Open the standard Salesforce.com Help & Training window

Optional Features:

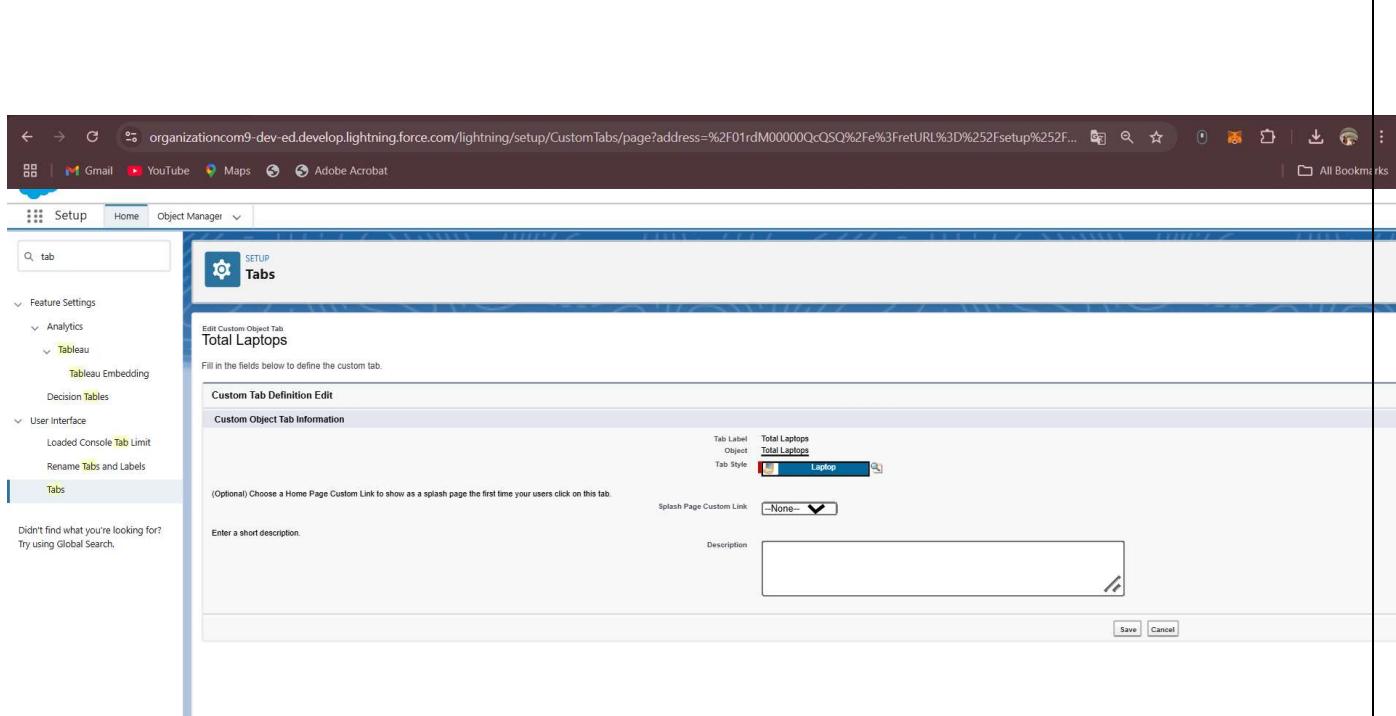
- Allow Reports
- Allow Activities
- Track Field History
- Allow in Chatter Groups
- Enable Licensing

Tabs

1) Creating a Custom Tab To

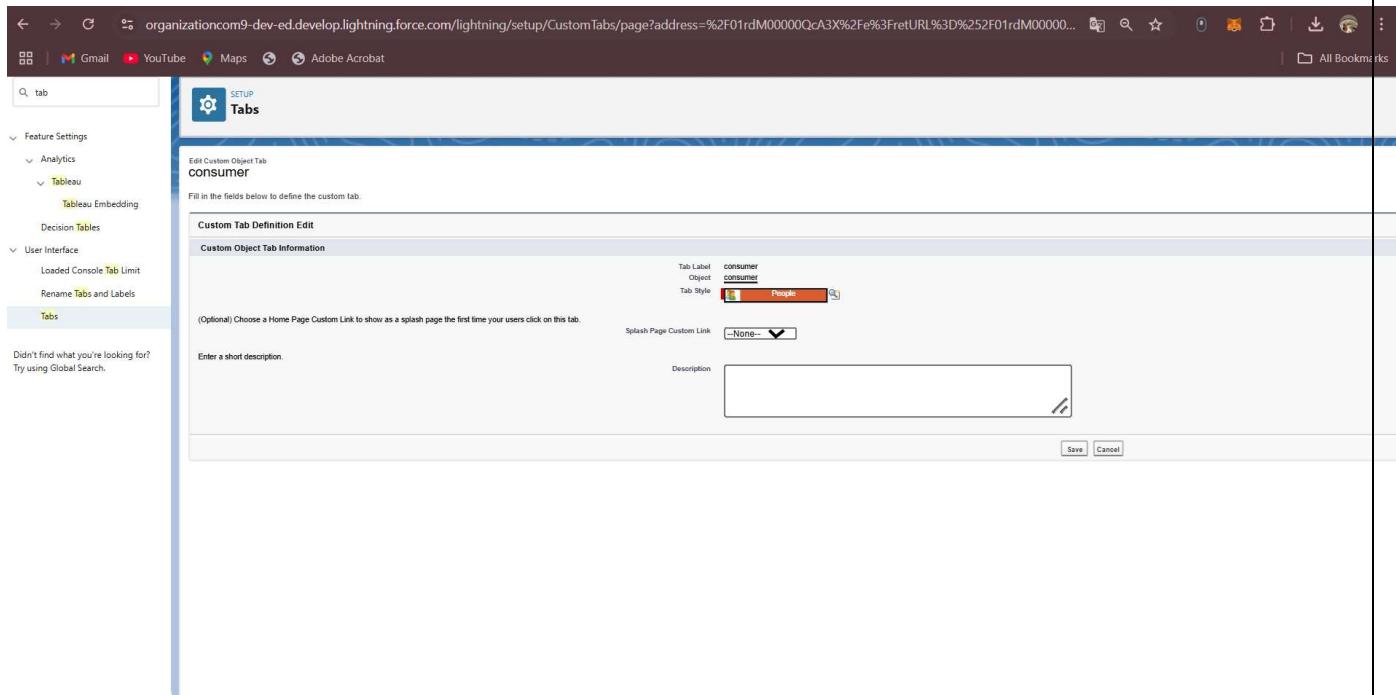
create a Tab: ()

- 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 .



The screenshot shows the Salesforce Setup interface with the 'Tabs' section selected. A search bar at the top left contains the text 'tab'. The main content area displays the 'Edit Custom Object Tab' page for 'Laptop Bookings'. The 'Custom Tab Definition Edit' section includes fields for 'Tab Label' (Laptop Bookings), 'Object' (Laptop Bookings), and 'Tab Style' (Computer). A note indicates '(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.' A dropdown menu for 'Splash Page Custom Link' is set to 'None'. Below this is a 'Description' field with a rich text editor. At the bottom right are 'Save' and 'Cancel' buttons.

The screenshot shows the Salesforce Setup interface with the 'Tabs' section selected. A search bar at the top left contains the text 'tab'. The main content area displays the 'Edit Custom Object Tab' page for 'Billing Process'. The 'Custom Tab Definition Edit' section includes fields for 'Tab Label' (Billing Process), 'Object' (Billing Process), and 'Tab Style' (Stack of Cash). A note indicates '(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.' A dropdown menu for 'Splash Page Custom Link' is set to 'None'. Below this is a 'Description' field with a rich text editor. At the bottom right are 'Save' and 'Cancel' buttons.

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allo

Action	Label	Tab Style
Edit Del	<u>Billing Process</u>	Stack of Cash
Edit Del	<u>consumer</u>	People
Edit Del	<u>Laptop Bookings</u>	Computer
Edit Del	<u>Total Laptops</u>	Laptop

Web Tabs
No Web Tabs have been defined

Visualforce Tabs
No Visualforce Tabs have been defined

Lightning Component Tabs
No Lightning component tabs have been defined

Lightning Page Tabs
No Lightning Page Tabs have been defined

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.lightning.force.com/visualEditor/appBuilder.app?id=02udM000009sg59QAA&retUrl=https%3A%2F%2Forganizationcom9-dev-ed... 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

*Developer Name

Description

App Branding

Image Primary Color Hex Value #0070D2

Clear

Org Theme Options

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

App Launcher Preview

← | Lightning App Builder | App Settings | Pages ▾ LAPTOP RENTALS | ? Help

App Settings

Navigation Items

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

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	Selected Items
<input type="button" value="C"/> <input type="button" value="Create"/> <input type="text" value="Type to filter list..."/>	<input type="button" value="Up"/> <input type="button" value="Down"/>
<input type="checkbox"/> Accounts <input type="checkbox"/> All Sites <input type="checkbox"/> Alternative Payment Methods <input type="checkbox"/> Analytics <input type="checkbox"/> App Launcher <input type="checkbox"/> Approval Requests <input type="checkbox"/> Asset Action Sources <input type="checkbox"/> Asset Actions <input type="checkbox"/> Asset State Periods <input type="checkbox"/> Assets	<input type="checkbox"/> Total Laptops <input type="checkbox"/> consumer <input type="checkbox"/> Billing Process <input type="checkbox"/> Laptop Bookings

○ Move system administrator from left to right:

The screenshot shows the 'User Profiles' section of the Lightning App Builder. On the left, a sidebar lists 'App Settings' options: App Details & Branding, App Options, Utility Items (Desktop Only), and Navigation Items. The 'User Profiles' option is selected and highlighted in blue. The main area is titled 'User Profiles' and contains a sub-section 'Available Profiles'. A search bar at the top of this list says 'Type to filter list...'. Below it is a scrollable list of profiles, including Agent, Analytics Cloud Integration User, Analytics Cloud Security User, Authenticated Website, B2B Reordering Portal Buyer Profile, Contract Manager, Cross Org Data Proxy User, Custom: Marketing Profile, and Custom: Sales Profile. To the right of this list are two buttons: a right-pointing arrow and a left-pointing arrow. To the right of the available profiles is a vertical panel titled 'Selected Profiles' which contains the profile 'System Administrator'.

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.

Setup > OBJECT MANAGER consumer

Fields & Relationships

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	CreatedBy	Lookup(User)		
Email	Email__c	Email		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		
Phone number	Phone_number__c	Phone		

SETUP > OBJECT MANAGER consumer

Step 2. Enter the details

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 entry

Default Value: Show Formula Editor

Use formula syntax. Evaluate text and picklist values like so in double quotes: "The_field". Include numbers without quotes (like 123456789) or decimal points (like 1.1), and express date values like this: #MM/DD/YYYY#. To reference a field from a Custom Metadata type record use \${CustomMetadata_Type__molt RecordName Field__c}

Setup > OBJECT MANAGER consumer

Fields & Relationships

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	CreatedBy	Lookup(User)		
Email	Email__c	Email		
Last Modified By	LastModifiedBy	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.

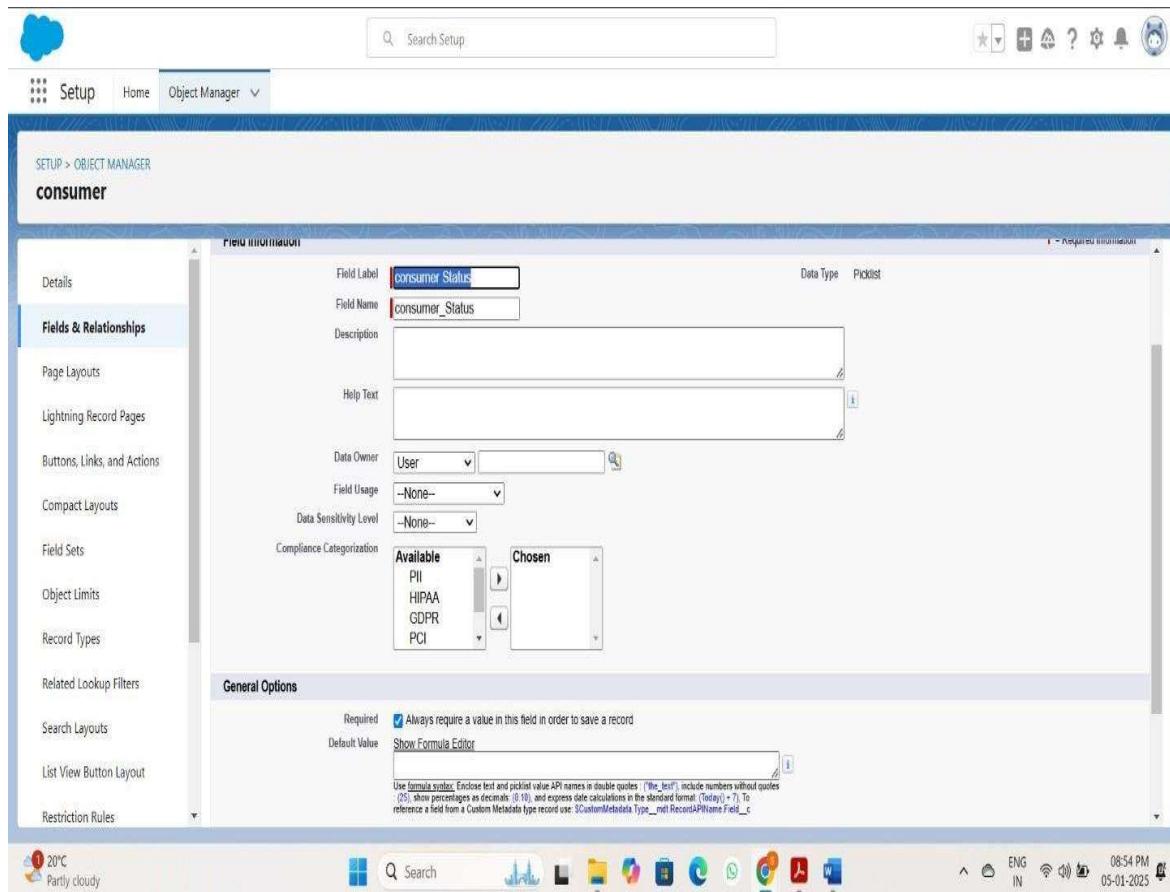
The screenshot shows the Salesforce Setup interface with the following details:

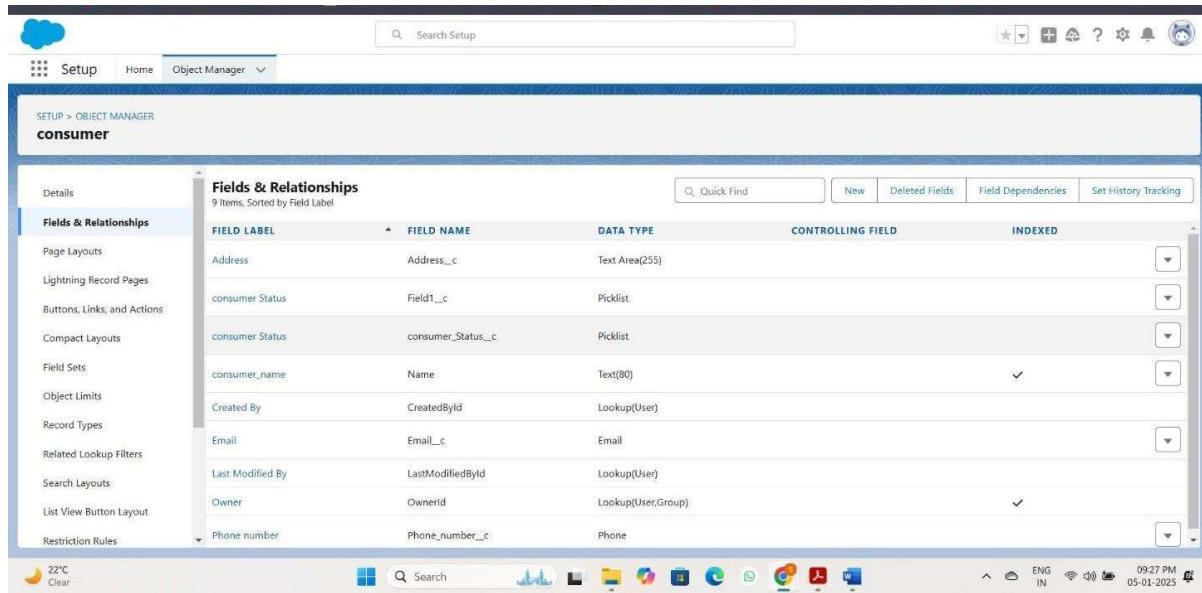
- Header:** Search bar with "Search Setup".
- Top Navigation:** Icons for Home, Object Manager, and other setup functions.
- Breadcrumb:** SETUP > OBJECT MANAGER > consumer
- Left Sidebar:** A vertical list of tabs including Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules.
- Main Content:**
 - Section:** Edit consumer Custom Field Address
 - Buttons:** Change Field Type, Save, Cancel.
 - Field Information:** Field Label: Address, Field Name: Address, Description: (empty), Help Text: (empty). Data Type: Text Area.
 - Owner and Usage:** Data Owner: User, Field Usage: -None-, Data Sensitivity Level: -None-.
 - Compliance:** Available: PII, HIPAA, GDPR, PCI. Chosen: Chosen.
- Bottom:** General Options tab, system status bar (20°C, Partly cloudy), search bar, and various system icons.

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 > 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

Master-Detail Relationship

External Lookup Relationship

checkbox

Currency

Date

Date/Time

Email

Geolocation

Number

Percent

Phone

picklist

Picklist (Multi-Select)

Text

Text Area

Text Area (Long)

Text Area (Rich)

Text (Encrypted)

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.

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Allows users to select a True (checked) or False (unchecked) value.

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.

Allows users to enter a date or pick a date from a popup calendar.

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.

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.

Allows users to define location. Includes latitude and longitude components, and can be used to calculate distance.

Allows users to enter any number. Leading zeros are removed.

Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.

Allows users to enter any phone number. Automatically formats it as a phone number.

Allows users to select a value from a list you define.

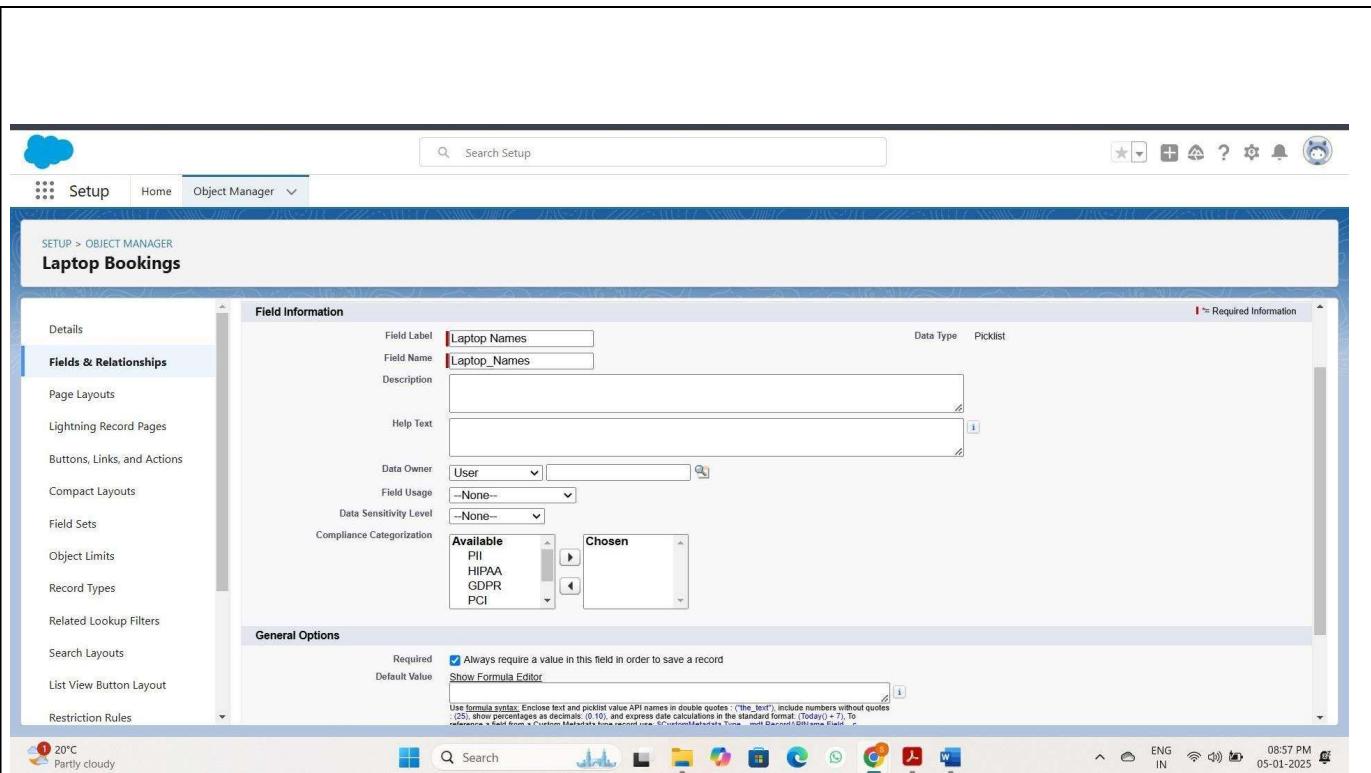
Allows users to enter any combination of letters and numbers.

Allows users to enter up to 255 characters on separate lines.

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.

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

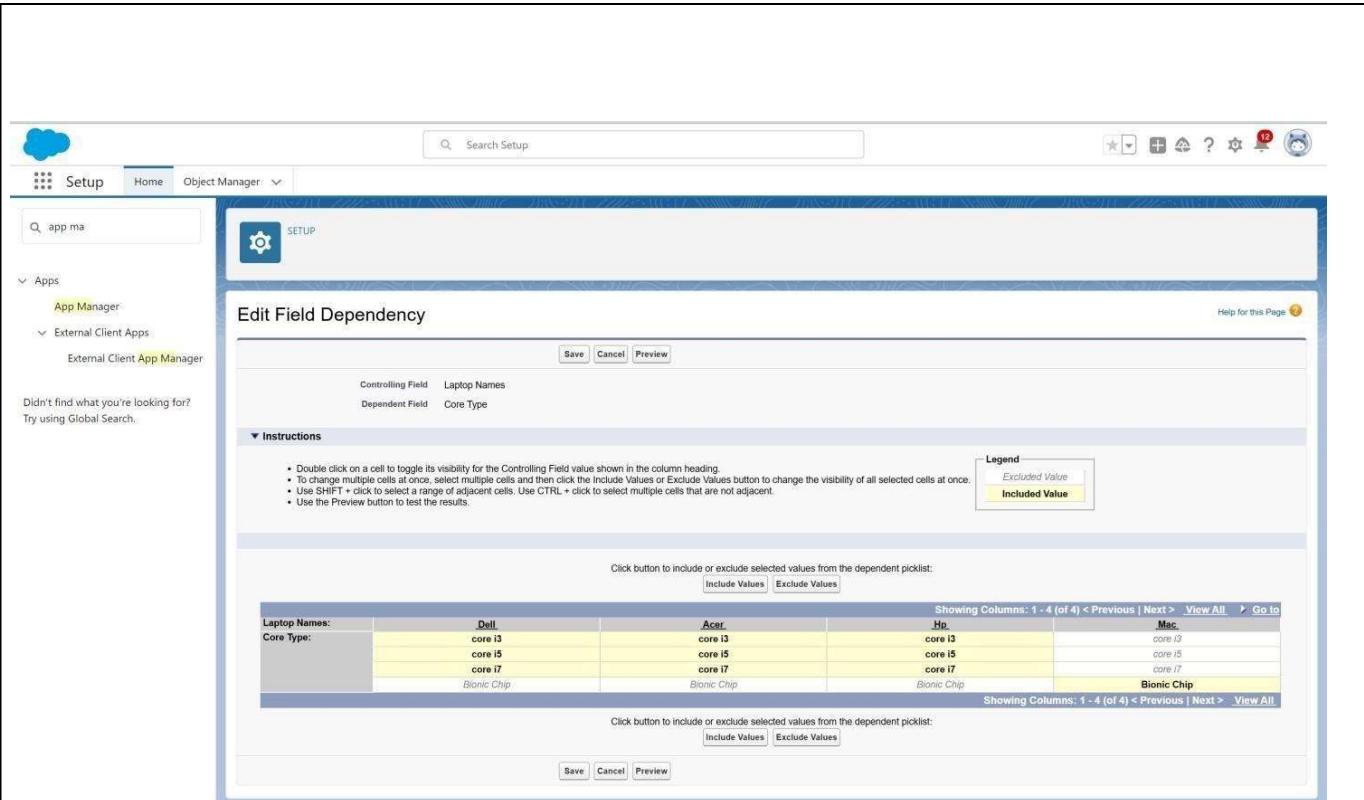
To create fields & relationship to an object:

- 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.

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.

Formulas 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 relationship field is populated 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.

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.

Help for this Page

New Relationship

Step 2. Choose the related object

Step 2 of 5

Select the other object to which this object is related.

Related To: consumer

Previous Next Cancel

2. To create fields in an object:

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

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'Laptop Bookings'. On the left, a sidebar lists various setup categories like 'Page Layouts', 'Buttons, Links, and Actions', and 'Field Sets'. The current section is 'Fields & Relationships'. A sub-section titled 'New Custom Field' is active. The main content area is 'Step 2. Enter the details'. It shows the following configuration:

- Field Label:** Amount
- Length:** 18
- Decimal Places:** 0
- Field Name:** Amount
- Description:** (empty)
- Help Text:** (empty)
- 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

At the bottom, there's a note about formula syntax and a 'Next' button.

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.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'Laptop Bookings'. On the left, a sidebar lists various setup categories like 'Page Layouts', 'Buttons, Links, and Actions', and 'Field Sets'. The current section is 'Fields & Relationships'. A sub-section titled 'New Relationship' is active. The main content area is 'Step 2. Choose the related object'. It shows the following configuration:

- Related To:** Total laptops

At the bottom, there's a 'Next' button.

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.

The screenshot shows the Salesforce Object Manager interface. The left sidebar lists various configuration options like Details, Fields & Relationships, Page Layouts, etc. The main area is titled 'Fields & Relationships' and displays a table of fields for the 'Laptop Bookings' object. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: Amount (Amount__c, Currency(18, 0)), core-type (core__c, Picklist), Created By (CreatedById, Lookup(User)), Laptop Bookings Name (Name, Text(80)), Laptop names (Laptop_type__c, Picklist), Last Modified By (LastModifiedById, Lookup(User)), Name (Name__c, Master-Detail(consumer)), and Total no of laptops (Total_no_of_laptops__c, Master-Detail(Total laptops)).

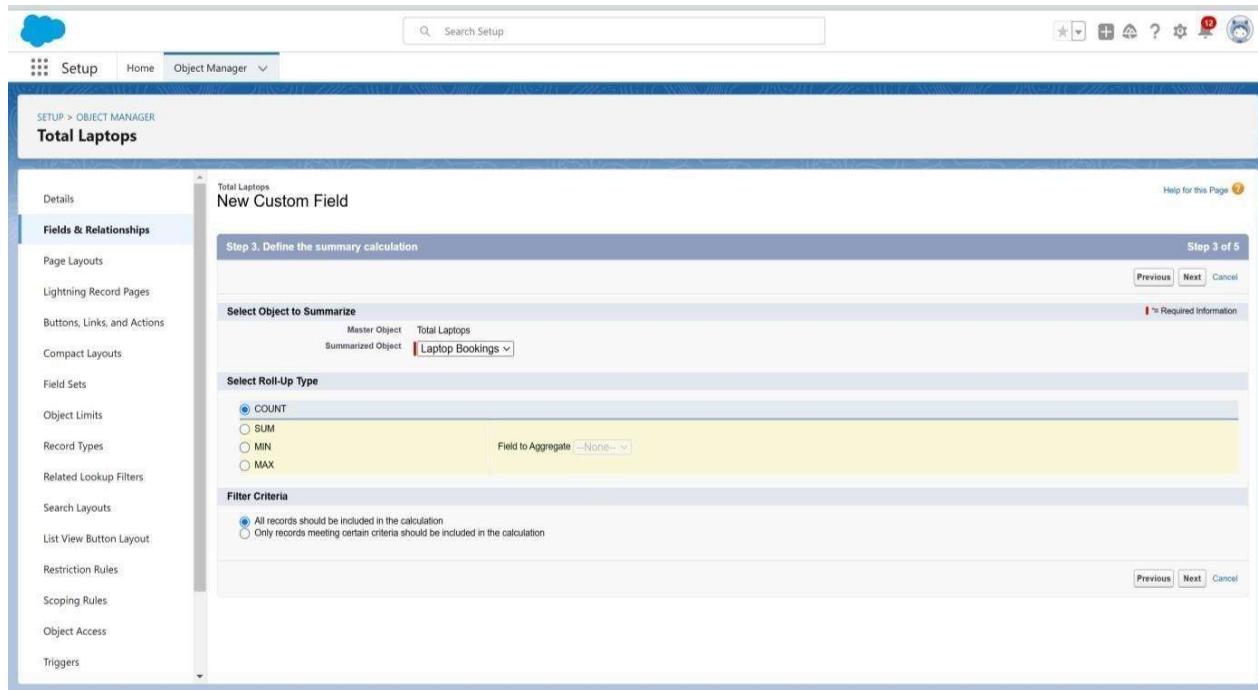
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Currency(18, 0)		
core-type	core__c	Picklist	Laptop names	
Created By	CreatedById	Lookup(User)		
Laptop Bookings Name	Name	Text(80)		
Laptop names	Laptop_type__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Master-Detail(consumer)		
Total no of laptops	Total_no_of_laptops__c	Master-Detail(Total laptops)		

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

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

The screenshot shows the Salesforce Setup interface for creating a new custom field. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'Total Laptops' under 'SETUP > OBJECT MANAGER'. On the left, a sidebar lists various setup categories like 'Details', 'Fields & Relationships', 'Page Layouts', etc. The current step is 'Step 1. Choose the field type'. The 'Data Type' section is open, showing options such as 'None Selected' (selected), 'Auto Number', 'Formula', 'Roll-Up Summary' (selected), 'Lookup Relationship', 'Master-Detail Relationship', 'External Lookup Relationship', 'Checkbox', and 'Currency'. Each option has a detailed description below it.

The screenshot shows the continuation of the custom field creation process. The title is 'Total Laptops New Custom Field'. The current step is 'Step 2 of 5'. The 'Field Label' is set to 'Laptops delivered', and the 'Field Name' is 'Laptops_delivered'. There are fields for 'Description' and 'Help Text', both of which are currently empty. A checkbox 'Auto add to custom report type' is checked, with a sub-option 'Add this field to existing custom report types that contain this entity' also checked. Navigation buttons 'Previous', 'Next', and 'Cancel' are visible at the bottom right.



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

SETUP > OBJECT MANAGER

Laptop Bookings

New Custom Field

Step 1. Choose the field type

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

Data Type

None Selected

Auto Number

Formula

Roll-Up Summary

Lookup Relationship

Master-Detail Relationship

External Lookup Relationship

Checkbox

Currency

Select one of the data types below.

A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

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.

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.

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.

Creates a special type of parent-child relationship between the object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship maintains all data for the child record.
- When a user creates and deletes a detail record, all detail records are deleted.
- 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.

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Allows users to select a True (checked) or False (unchecked) value.

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.

Step 1

Next | Cancel | Help for this Page

SETUP > OBJECT MANAGER

Laptop Bookings

New Custom Field

Step 2. Choose output type

Field Label

Field Name

Auto add to custom report type Add this field to existing custom report types that contain this entity

Formula Return Type

None Selected

Checkbox

Currency

Date

Date/Time

Number

Percent

Text

Time

Select one of the data types below.

Calculate a boolean value.
Example: `TODAY() > CloseDate`

Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: `Gross Margin = Amount - Cost_c`

Calculate a date, for example, by adding or subtracting days to other dates.
Example: `Reminder Date = CloseDate - 7`

Calculate a date/time, for example, by adding a number of hours or days to another date/time.
Example: `Next = NOW() + 1`

Calculate a numeric value.
Example: `Fahrenheit = 1.8 * Celsius_c + 32`

Calculate a percent and automatically add the percent sign to the number.
Example: `Discount = (Amount - Discounted_Amount_c) / Amount`

Create a text string, for example, by concatenating other text fields.
Example: `Full Name = LastName & ", " & FirstName`

Calculate a time, for example, by adding a number of hours to another time.
Example: `Next = TIMEVALUE(NOW()) + 1`

Decimal Places Example: 999

Step 2 of 5

Previous | Next | Cancel | Help for this Page

The screenshot shows the Salesforce Setup interface with the following details:

- Header:** Search Setup, Home, Object Manager.
- Breadcrumb:** SETUP > OBJECT MANAGER
- Section:** Laptop Bookings
- Sub-section:** New Custom Field
- Step:** Step 3 of 5
- Form Fields:**
 - Step 3. Enter formula
 - Example: Fahrenheit = 1.8 * Celsius + 32 | More Examples...
 - Simple Formula | Advanced Formula
 - Insert Field | Insert Operator
 - Functions: ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN
 - Laptops Available (Number) = 50 - Total_No_of_Laptops__r.Laptops_delivered__c
- Quick Tips:** Getting Started, Operators & Functions

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” and Label: how many months
4. Picklist values are 1.2.3.4.5 6. Click and save it.

The screenshot shows the Salesforce Setup interface for creating a new object named 'Laptop Bookings'. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main pane displays the 'Fields & Relationships' configuration. A large table lists field types with their descriptions:

Field Type	Description
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.

At the bottom right of the configuration pane are 'Next' and 'Cancel' buttons.

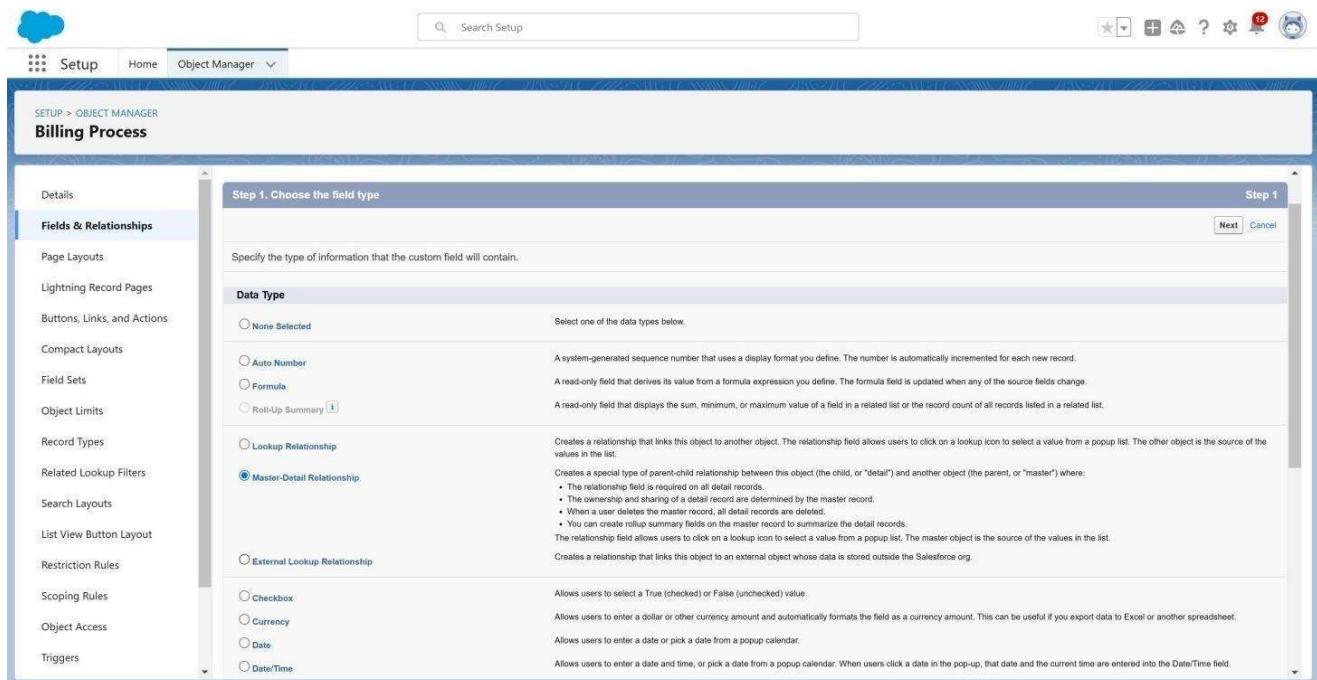
The screenshot shows the 'Step 2. Enter the details' configuration for a picklist field named 'how many months'. The left sidebar lists various setup categories. The main pane shows the field configuration:

- Field Label:** 'how many months'
- Values:**
 - Use global picklist value set.
 - Enter values, with each value separated by a new line
- Value Input Area:** A text area containing the values '1', '2', '3', '4', and '5'.
- Field Options:**
 - 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:** (empty text area)
- Help Text:** (empty text area)
- 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

The screenshot shows the 'Billing Process' object in the Salesforce Object Manager. The user is in the 'Fields & Relationships' section, specifically on the 'New Relationship' page. The page title is 'Billing Process: New Relationship'. It's Step 2 of 6, titled 'Step 2. Choose the related object'. The instruction says 'Select the other object to which this object is related.' A dropdown menu labeled 'Related To' contains the option 'consumer'. Navigation buttons at the bottom right include 'Previous', 'Next', and 'Cancel'.

The screenshot shows the 'Billing Process' object in the Salesforce Object Manager. The user is in the 'Fields & Relationships' section, specifically on the 'New Custom Field' page. The page title is 'Billing Process: New Custom Field'. It's Step 1 of 1, titled 'Step 1. Choose the field type'. The instruction says 'Specify the type of information that the custom field will contain.' Under 'Data Type', the 'Lookup Relationship' option is selected. Other options shown include 'None Selected', 'Auto Number', 'Formula', 'Roll-Up Summary', 'Master-Detail Relationship', 'External Lookup Relationship', 'Checkbox', and 'Currency'. Detailed descriptions for each data type are provided. Navigation buttons at the bottom right include 'Next' and 'Cancel'.

The screenshot shows the Salesforce Setup interface for the Billing Process object. The left sidebar lists various configuration options under 'Fields & Relationships'. The main area is titled 'New Relationship' and is on 'Step 2. Choose the related object'. A dropdown menu shows 'Related To' set to 'Laptop Bookings'. Navigation buttons at the bottom right include 'Previous', 'Next', and 'Cancel'.

The screenshot shows the Salesforce Setup interface for the Billing Process object. The left sidebar lists various configuration options under 'Fields & Relationships'. The main area is titled 'New Relationship' and is on 'Step 3 of 6. Enter the label and name for the lookup field'. The 'Field Label' is 'Laptop Booking', 'Field Name' is 'laptop_Booking', and 'Description' is empty. Under 'Child Relationship Name', it is set to 'Billing_Process'. The 'Required' section has two options: 'Always require a value in this field in order to save a record' (unchecked) and 'Clear the value of this field. You can't choose this option if you make this field required.' (checked). The 'What to do if the lookup record is deleted?' section has three options: 'Don't allow deletion of the lookup record that's part of a lookup relationship.' (unchecked), 'Auto add to custom report type' (unchecked), and 'Add this field to existing custom report types that contain this entity' (checked). The 'Lookup Filter' section is partially visible at the bottom.

The screenshot shows the Salesforce Setup interface with the following details:

Header: Search Setup, Home, Object Manager

Breadcrumb: SETUP > OBJECT MANAGER

Section: Billing Process

Left Sidebar (Categories):

- 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

Fields & Relationships Section Content:

- 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.

Other Fields Section Content:

- 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 Rich:** Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

Setup > OBJECT MANAGER

Billing Process

Step 2. Enter the details

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

Step 2 of 4

Previous Next Cancel

Setup > OBJECT MANAGER

Billing Process

Step 1. Choose the field type

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

Data Type

None Selected Select one of the data types below.

Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

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.

External Lookup Relationship 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.

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.

Data/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.

Step 1

Next Cancel

SETUP > OBJECT MANAGER

Billing Process

Step 2. Choose output type

Field Label: Field Name:

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 datetime, for example, by adding a number of hours or days to another datetime.
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 &c .& FirstName)`

Time Calculate a time, for example, by adding a number of hours to another time.
Example: `(Next = TIMEVALUE(NOW()) + 1)`

Options Example: 999.00

Previous Next Cancel Step 2 of 5

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

SETUP > OBJECT MANAGER

Billing Process

Step 3. Enter formula

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...](#)

Simple Formula Advanced Formula

Insert Field Insert Operator

Amount (Currency) =

Functions ABS ACOS ADDMONTHS AND ASCII ASIN

Quick Tips

- Getting Started
- Operators & Functions

Insert Selected Function

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

SETUP > OBJECT MANAGER

Total Laptops

New Custom Field

Step 1. Choose the field type

Step 1

Step 1 of 5

Next Cancel

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

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 master record contains all detail records.
- The ownership and state 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.

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.

SETUP > OBJECT MANAGER

Total Laptops

Step 2. Choose output type

Step 2 of 5

Previous Next Cancel

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

Field Label

Field Name

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)`

DateTime Calculate a datetime, for example, by adding a number of hours or days to another datetime.
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 Example: 999

SETUP > OBJECT MANAGER
Total Laptops

Fields & Relationships

Laptops Available (Number) = \$0 - Laptops Delivered__c

Check Syntax No syntax errors in merge fields or functions. (Compiled size: 36 characters)

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.

SETUP > OBJECT MANAGER
consumer

consumer Validation Rule

Validation Rule Edit

Rule Name: Phonenumberoremailblankrule

Active:

Description: phone number and email number should not be blank

Error Condition Formula

Example: Discount_Percent_c > 0.30 More Examples...
Display an error if Discount is more than 30%

If this formula expression is true, display the text defined in the Error Message area

Functions

ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN

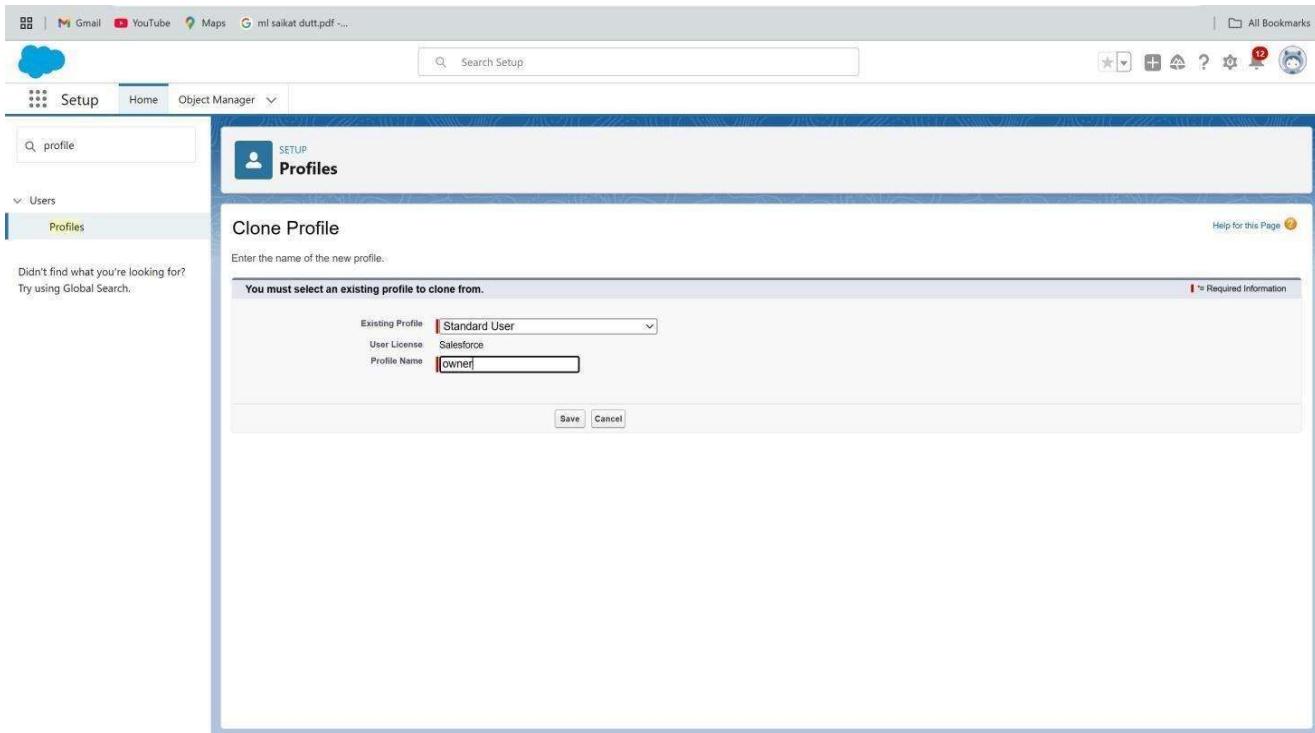
Insert Selected Function

Check Syntax No errors found

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.

The screenshot shows the Salesforce Setup - Profiles page. In the left sidebar, under 'Users', 'Profiles' is selected. A search bar at the top has 'profile' typed into it. The main area is titled 'Profiles' and contains a large grid of checkboxes for granting permissions to various objects. Below this is a section for 'Custom Object Permissions' with two tables: one for 'Billing Process' and one for 'consumer'. At the bottom are sections for 'Session Settings' and 'Password Policies'.

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

The screenshot shows the 'Clone Profile' page. The title is 'Clone Profile' and there is a note 'Enter the name of the new profile.' Below this is a message 'You must select an existing profile to clone from.' A dropdown menu for 'Existing Profile' is set to 'Standard Platform User'. The 'Profile Name' field contains 'Agent'. At the bottom are 'Save' and 'Cancel' buttons.

The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The top navigation bar includes 'Search Setup', 'Home', and 'Object Manager'. The left sidebar shows 'Users' and 'Profiles' under 'Setup'. A search bar at the top says 'profile'. The main content area has sections for 'Custom Object Permissions' (listing Contact Point Addresses, Contact Point Consents, Contact Point Emails, Push Topics, Sellers, Streaming Channels, User External Credentials) and 'Session Settings' (Session Times Out After: 2 hours of inactivity, Session Security Level Required at Login: None). Below these are 'Password Policies' settings.

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.

The screenshot shows the Salesforce Setup interface with the 'Roles' tab selected. A modal window titled 'New Role' is open, displaying a 'Role Edit' form. The 'Label' field is set to 'owner', the 'Role Name' field is set to 'Owner', and the 'This role reports to' dropdown is set to 'CEO'. There is also a field for 'Role Name as displayed on reports' which is currently empty. At the bottom of the modal are three buttons: 'Save', 'Save & New', and 'Cancel'. The background of the setup page shows a sidebar with categories like Sales, Service, and Case Teams, and a main content area with a search bar and a message about global search.

The screenshot shows the Salesforce Setup interface with the 'Roles' tab selected. A large tree view titled 'Your Organization's Role Hierarchy' is displayed. The hierarchy starts with 'LBRECE' at the root level, which branches into 'CEO', 'CFO', 'COO', and 'owner'. 'CEO' further branches into 'SVP_Customer_Service & Support', 'Customer_Support_International', 'Customer_Support_North_America', and 'Installation & Repair Services'. 'SVP_Customer_Service & Support' branches into 'SVP_Human_Resources' and 'SVP_Sales & Marketing'. 'SVP_Sales & Marketing' branches into 'VP_International_Sales', 'VP_Marketing', and 'Marketing_Team'. 'Marketing_Team' branches into 'VP_North_American_Sales'. Each node in the tree has 'Edit', 'Del', and 'Assign' buttons next to it. The background of the setup page shows a sidebar with categories like Sales, Service, and Case Teams, and a main content area with a search bar and a message about global search.

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.

The screenshot shows the Salesforce Setup interface. The left sidebar is expanded, showing the 'Users' section under 'User Management Settings'. The main area displays the 'User Edit' screen for a user named 'vicky'. The 'General Information' section contains fields for First Name (vicky), Last Name (y), Alias (vicky), Email (rajumullangi5@gmail.com), Username (rajumullangi5@gmail.com), Nickname (User173339737482299603), Title (empty), Company (empty), Department (empty), and Division (empty). On the right side, there are sections for Role (owner), User License (Salesforce), Profile (owner), and various checkboxes for 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 (checked), Debug Mode, Quick Access Menu (checked), and Salesforce CRM Content User.

This screenshot shows the same Salesforce Setup interface as the first one, but it is for a new user named 'ram'. The 'General Information' section has been populated with the values: First Name (ram), Last Name (ram), Alias (ram), Email (hello143@gmail.com), Username (hello143@gmail.com), Nickname (raman), Title (empty), Company (empty), Department (empty), and Division (empty). The right-hand configuration panel remains identical to the first screenshot, including the checked 'Load Lightning Pages While Scrolling' option.

Flows

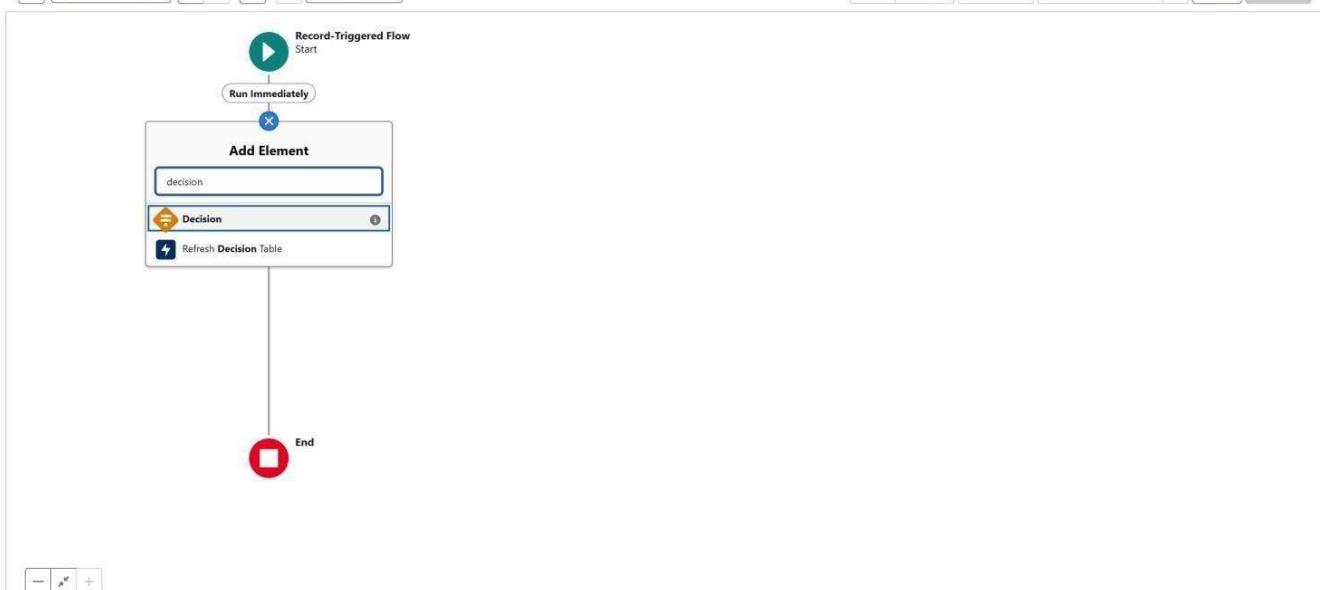
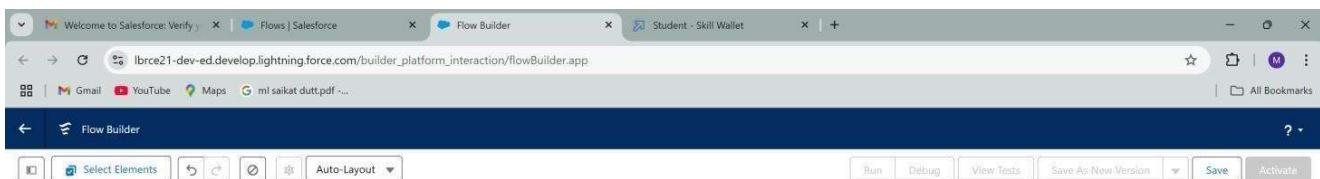
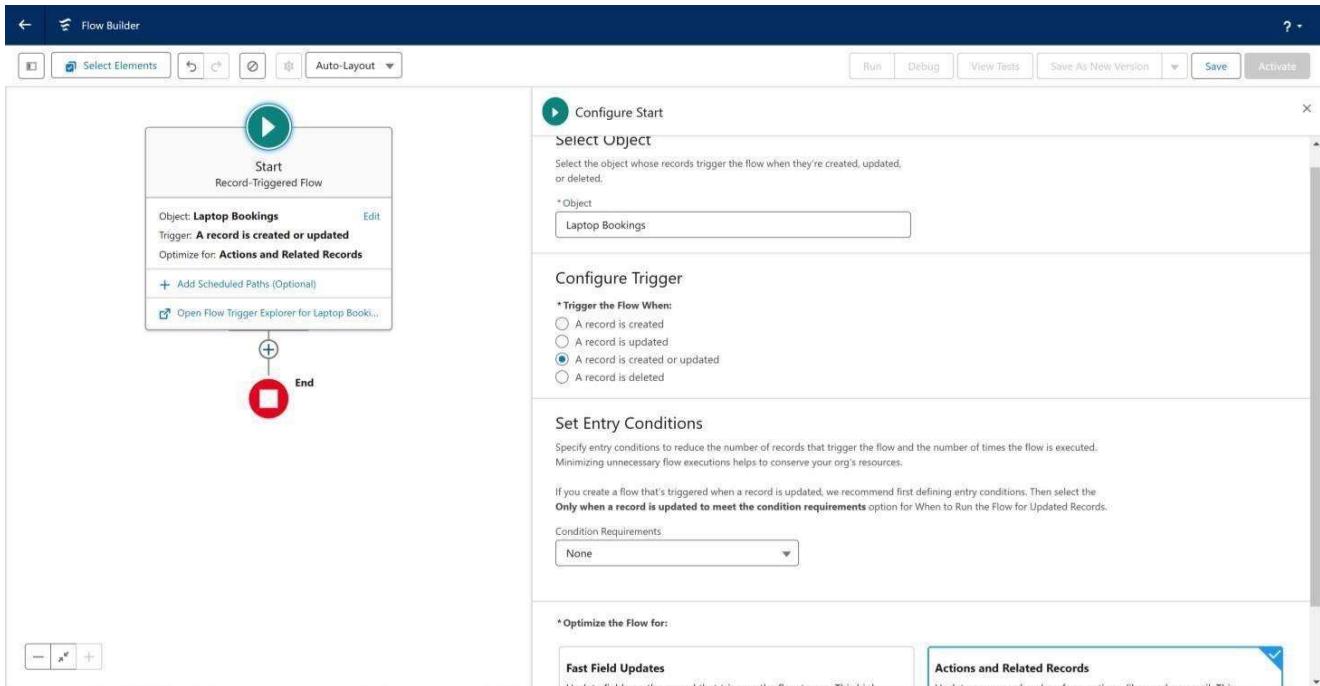
Create a Flow on dell laptop

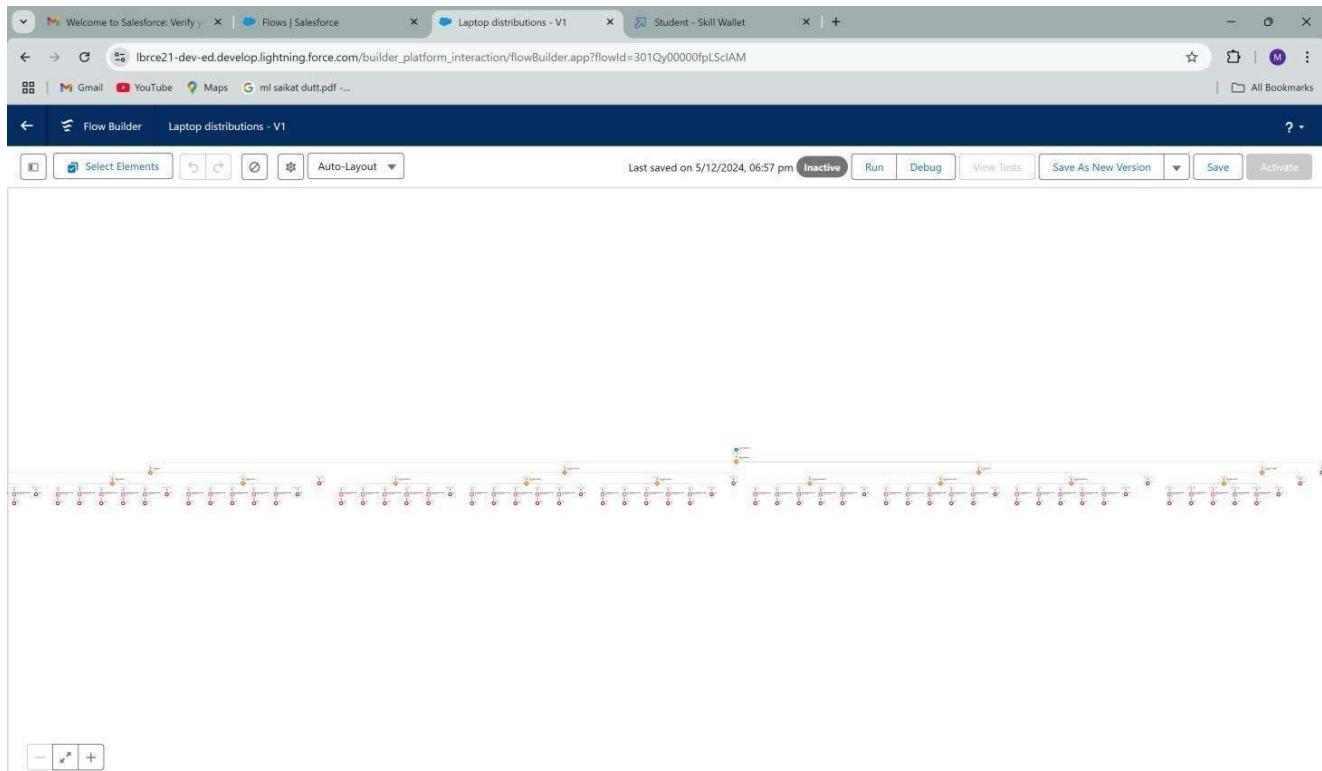
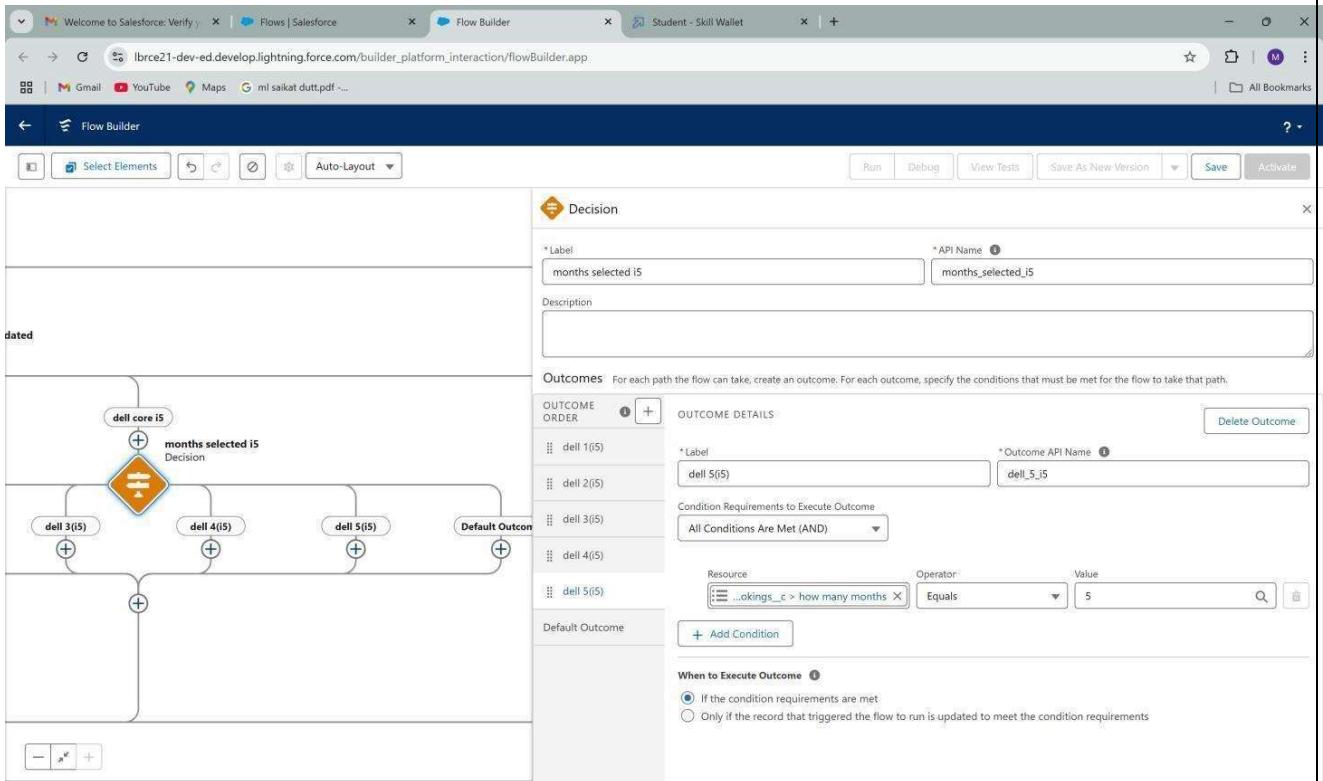
Activity - 1. Go to setup >>type Flow in quick find box >> Click on the Flow and Select the New Flow.

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.





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});
```

```
}
```

```
}
```

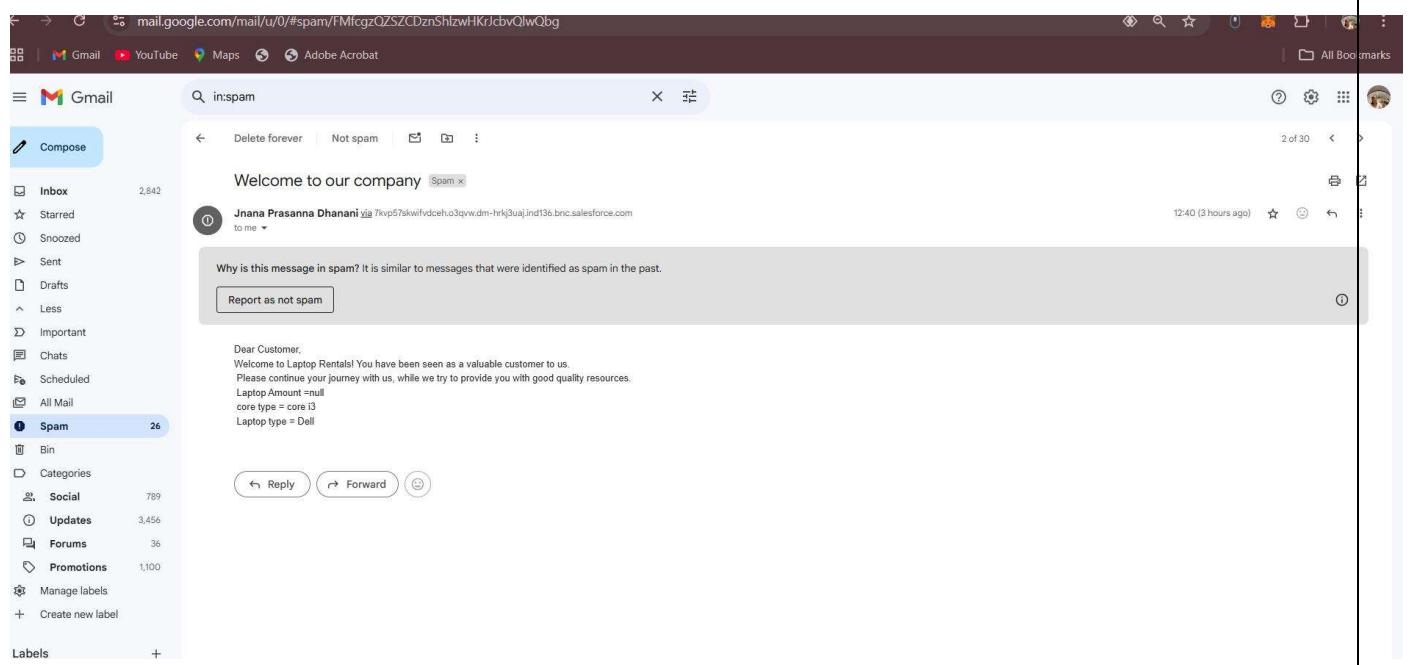
```
}
```

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.

The screenshot shows the Salesforce Reports page. The search bar at the top right contains the text "sam". The results list displays several sample reports under the "All Reports" category:

Report Name	Description	Folder	Created By	Created On	Subscribed
Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	3/1/2025, 10:39 am	[checkbox]
Sample Report: Orchestration Run Logs	What orchestration run logs were created and what happened in their associated orchestration runs?	Public Reports	Automated Process	3/1/2025, 10:39 am	[checkbox]
Sample Report: Orchestration Runs	What orchestration runs have been created and what's the current status of each run?	Public Reports	Automated Process	3/1/2025, 10:39 am	[checkbox]
Sample Report: Orchestration Stage Runs	What orchestration stage runs have been created and what's the current status of each run?	Public Reports	Automated Process	3/1/2025, 10:39 am	[checkbox]
Sample Report: Orchestration Step Runs	What orchestration step runs have been created and what's the current status of each run?	Public Reports	Automated Process	3/1/2025, 10:39 am	[checkbox]
Sample Report: Orchestration Work Items	What orchestration work items were created and what's the current status of each work item?	Public Reports	Automated Process	3/1/2025, 10:39 am	[checkbox]

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.

The screenshot shows the "Create Report" dialog box. The left sidebar shows categories like Accounts & Contacts, Opportunities, Customer Support Reports, Leads, Campaigns, Activities, Contracts and Orders, and Price Books, Products and Assets. The main area is titled "Select a Report Type" and has a search bar containing "lap". The results list includes:

Report Type Name	Category
Total Laptops	Standard
Total Laptops with Laptop Bookings	Standard
Total Laptops with Laptop Bookings and Consumer	Standard
Total Laptops History	Standard
consumer with Billing Process and Laptop Bookings	Standard
Laptop Bookings History	Standard

The report "Total Laptops with Laptop Bookings and Consumer" is selected and highlighted with a red box. The "Details" panel on the right shows the report name "Total Laptops with Laptop Bookings and Consumer", its status as "Standard Report Type", and a large blue "Start Report" button. Other sections in the details panel include "Created By You" (Laptop Analytics) and "Created By Others" (No Reports Yet). A note indicates "Fields (41)".

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.

The screenshot shows the Report Builder interface with a modal dialog titled "Edit Bucket Column". The dialog contains a table with four rows, each defining a range for the "Amount" field and assigning it to a specific bucket name. The ranges are: " ≤ 900 " for "basic", " $> 900 \text{ to } 1500$ " for "intermediate", " $> 1,500 \text{ to } 10,000$ " for "high", and " $> 10,000$ " for "very high". There is also a checkbox at the bottom left to "Treat empty Amount values in the report as zeros".

Click apply it.

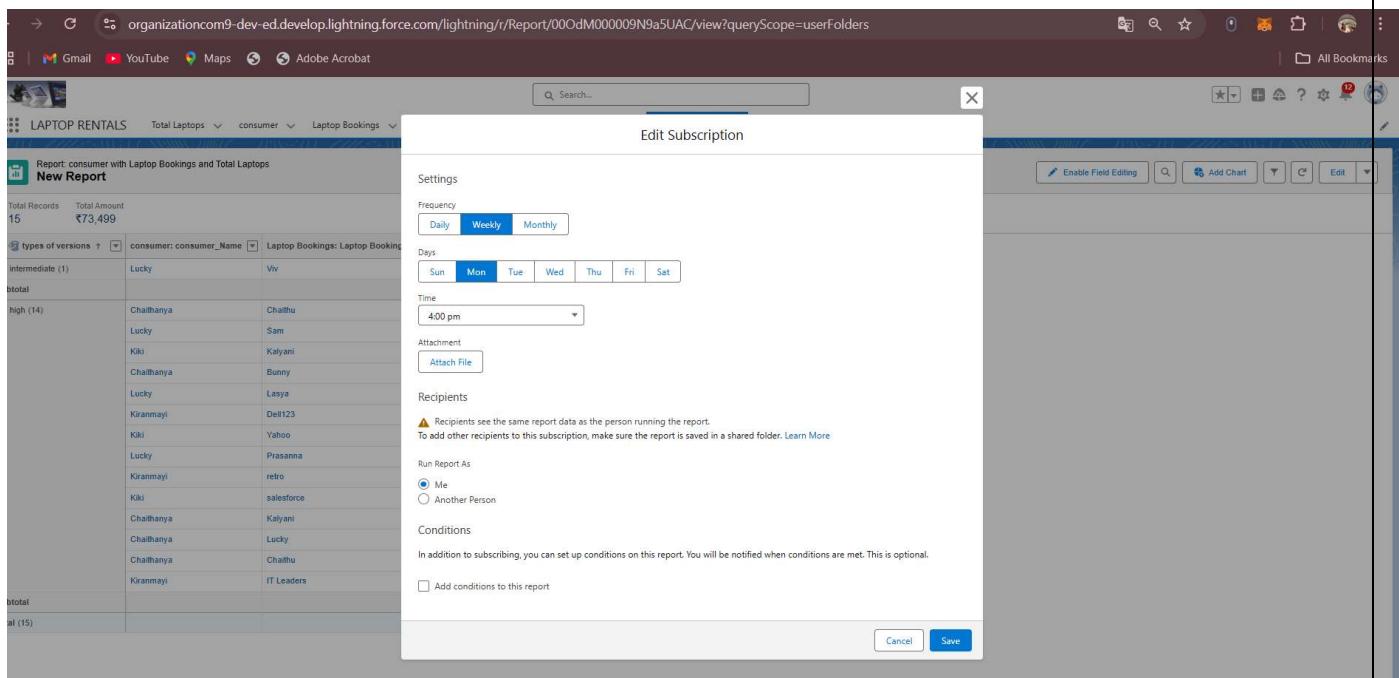
8. Select Types of version in Group By Rows to create a **summary report**. Follow the image for other fields.

The screenshot shows a summary report with a single row containing the total amount of ₹73,499. The report includes a header with fields: "Report: consumer with Laptop Bookings and Total Laptops" and "New Report". Below the header is a table with five columns: "types of versions", "consumer: consumer_Name", "Laptop Bookings: Laptop Bookings Name", "Total No Of Laptops: Total Laptops", and "Amount". The table shows two main groups: "intermediate (1)" and "high (14)". The "high (14)" group contains 14 rows of consumer names and their laptop booking details, with a total amount of ₹72,499. The "total" row at the bottom shows a total amount of ₹73,499.

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.

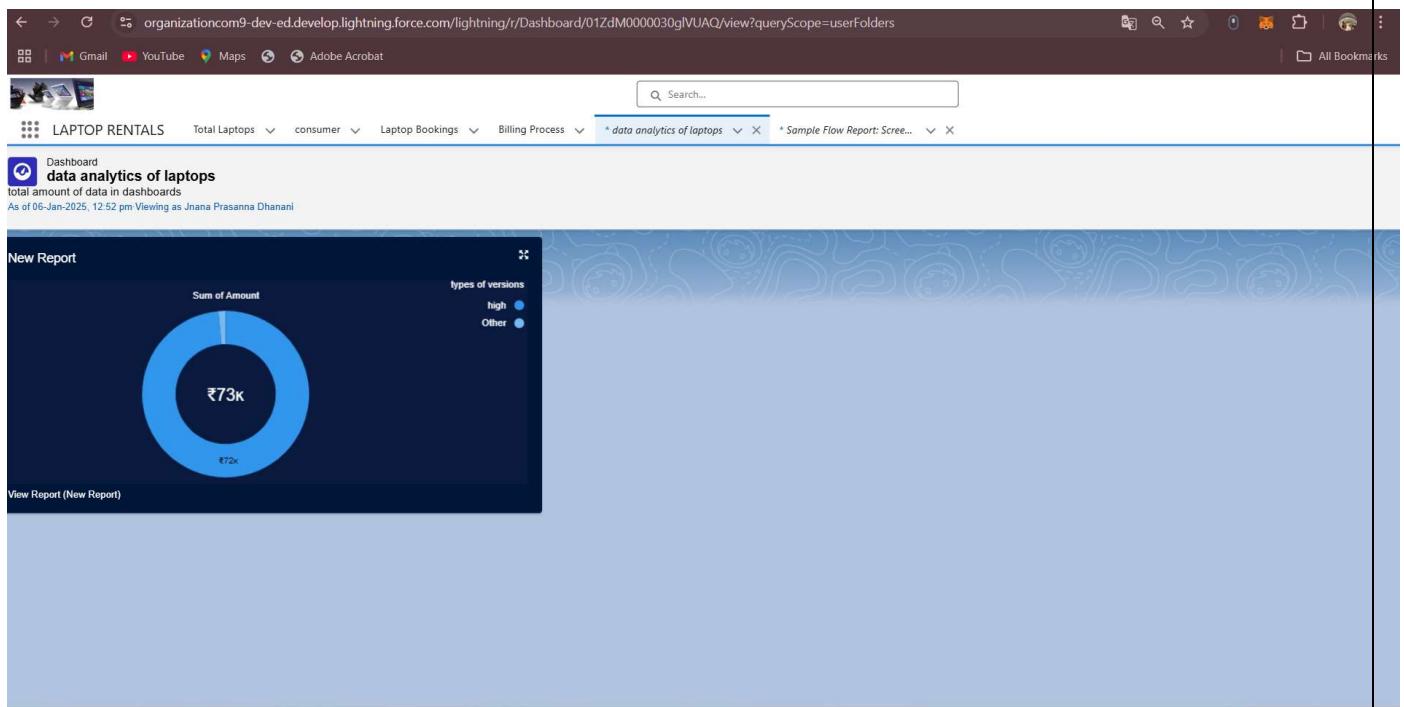


Create Dashboard Folder

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



