

A CRM APPLICATION FOR LAPTOP RENTALS

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Object Creation :

The screenshot shows the 'Edit Custom Object' interface for a custom object named 'Total Laptops'. The page is divided into several sections:

- Custom Object Definition Edit**: A header bar with 'Save' and 'Save & Close' buttons.
- Custom Object Information**: A section with a note about singular and plural labels. It includes fields for 'Label' (Total Laptops), 'Plural Label' (Total Laptops), and 'Starts with vowel sound' (checkbox).
- Object Name**: A section for the API name, showing 'Object Name' (Total_Laptops) and 'Example: Account'.
- Description**: A text input field for a description.
- Context-Sensitive Help Setting**: Options for help settings: 'Open the standard Salesforce.com Help & Training window' (selected) and 'Open a window using a Visualforce page'.
- Content Name**: A dropdown menu set to 'None'.
- Enter Record Name Label and Format**: A section explaining record names and their appearance in various contexts. It includes 'Record Name' (Total Laptops) and 'Example: Account Name'.
- Data Type**: Set to 'Text'.
- Optional Features**: A section at the bottom.

organizationcom9-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01IdM000003hvU9/edit?address=%2F01IdM000003hvU9%2Fe%3FretURL%3D

Laptop Bookings

Details

Edit Custom Object
Laptop Bookings

Custom Object Definition Edit

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: **Example:** Account

Plural Label: **Example:** Accounts

Starts with vowel sound:

Object Name: **Example:** Account

Description:

Context-Sensitive Help Setting: Open the standard Salesforce.com Help & Training window
 Open a window using a Visualforce page

Content Name:

Enter Record Name Label and Format

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

Record Name: **Example:** Account Name

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

Optional Features

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

organizationcom9-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdM000003hw0b/edit?address=%2F01IdM000003hw0b%2Fe%3FretURL%3D%252Fsetup%252F...

Details

Billing Process

Custom Object Definition Edit

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: Example: Account
 Plural Label: Example: Accounts
 Starts with vowel sound:

Object Name: Example: Account

Description:

Context-Sensitive Help Setting: Open the standard Salesforce.com Help & Training window Open a window using a Visualforce page
 Content Name:

Enter Record Name Label and Format

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

Record Name: Example: Account Name
 Data Type: Warning: If you plan to insert a high volume of records in this object, via the API for example, use the

Optional Features

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

Tabs :

organizationcom9-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2F01rdM00000QcQSQ%2Fe%3FretURL%3D%252Fsetup%252F...

Setup **Home** **Object Manager**

tab

SETUP
Tabs

Edit Custom Object Tab
Total Laptops

Fill in the fields below to define the custom tab.

Custom Tab Definition Edit

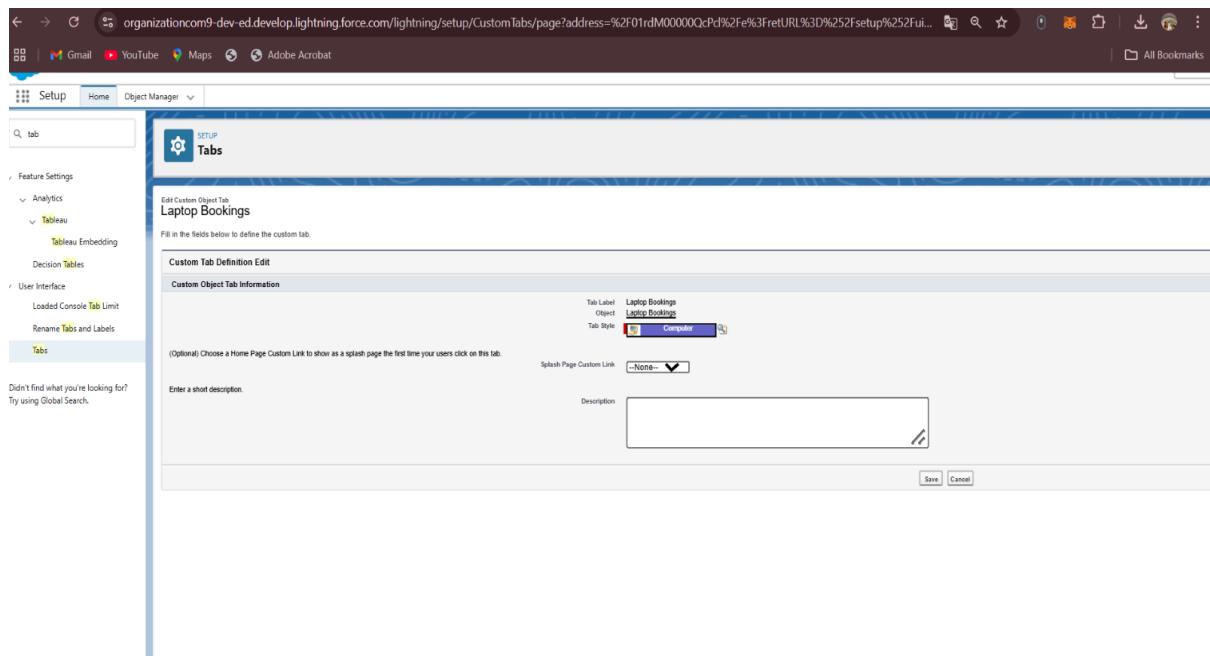
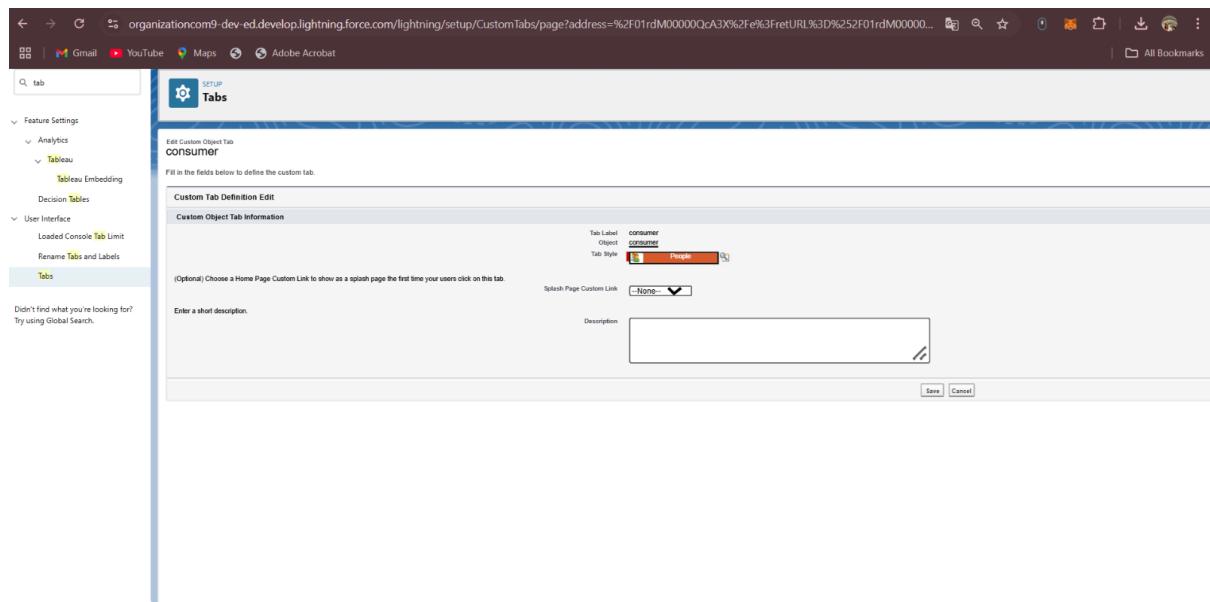
Custom Object Tab Information

Tab Label:
 Object:
 Tab Style:

(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:

Enter a short description:

Save **Cancel**



The screenshot shows the Salesforce Setup interface under the 'Tabs' section. A custom object tab for 'Billing Process' is being configured. The 'Tab Style' dropdown is set to 'Stack of Cash'. Other options shown include 'People', 'Computer', and 'Laptop'.

The screenshot shows the Salesforce Lightning App Builder interface under the 'Custom Tabs' section. It lists four custom object tabs:

- Billing Process (Label: Billing Process, Tab Style: Stack of Cash)
- consumer (Label: consumer, Tab Style: People)
- Laptop Bookings (Label: Laptop Bookings, Tab Style: Computer)
- Total Laptops (Label: Total Laptops, Tab Style: Laptop)

Below these, there are sections for 'Web Tabs', 'Visualforce Tabs', 'Lightning Component Tabs', and 'Lightning Page Tabs', each indicating that no tabs have been defined.

Create a Lightning App:

organizationcom9-dev-ed.lightning.force.com/visualEditor/appBuilder.app?id=02udM000009g59QAA&retUrl=https%3A%2F%2Forganizationcom9-dev-ed...

Lightning App Builder | App Settings | Pages | LAPTOP RENTALS

App Settings

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 Branding
<p>*App Name <input type="text" value="LAPTOP RENTALS"/></p> <p>*Developer Name <input type="text" value="LAPTOP_RENTALS"/></p> <p>Description <input type="text" value="Enter a description..."/></p>	<p>Image <input type="file"/></p> <p>Primary Color Hex Value <input type="text" value="#0070D2"/></p> <p>Org Theme Options <input type="checkbox"/> Use the app's image and color instead of the org's custom theme</p>
<p>App Launcher Preview</p>	

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

App Settings

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	Selected Items
<input type="text" value="Type to filter list..."/> <ul style="list-style-type: none"> Accounts All Sites Alternative Payment Methods Analytics App Launcher Approval Requests Asset Action Sources Asset Actions Asset State Periods Assets 	<ul style="list-style-type: none"> Total Laptops consumer Billing Process Laptop Bookings
<p>Navigation Items</p>	

User Profiles

Choose the user profiles that can access this app.

Available Profiles

- Agent
- Analytics Cloud Integration User
- Analytics Cloud Security User
- Authenticated Website
- Authenticated Website
- B2B Reordering Portal Buyer Profile
- Contract Manager
- Cross Org Data Proxy User
- Custom: Marketing Profile
- Custom: Sales Profile

Selected Profiles

- System Administrator

Fields :

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(30)		✓
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		

Step 2: Enter the details

Field Label:

Field Name:

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:

The formula editor allows you to enter a formula that will calculate the default value based on another field or record. For example, if you have a field 'Parent' and another field 'Child', you could use the formula 'Child = Parent'. This would mean that whenever a new record is created, the 'Child' field would automatically be set to the value of the 'Parent' field.

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

- Header:** Search Setup, Home, Object Manager
- Breadcrumbs:** SETUP > OBJECT MANAGER consumer
- Left Sidebar:** 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, Restriction Rules.
- Table:** Fields & Relationships (9 items, sorted by Field Label). The table includes columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data is as follows:

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		

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

- Header:** Search Setup, Home, Object Manager
- Breadcrumbs:** SETUP > OBJECT MANAGER consumer
- Left Sidebar:** 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, Restriction Rules.
- Form:** Edit consumer Custom Field Address. The form includes sections: Custom Field Definition Edit, Field Information, General Options, and General Settings.
- Field Information:** Field Label: Address, Field Name: Address, Data Type: Text Area, Description: (empty), Help Text: (empty), Data Owner: User, Field Usage: -None-, Data Sensitivity Level: -None-, Compliance Categorization: Available (PII, HIPAA, GDPR, PCI) and Chosen (empty).
- General Options:** Help for this Page, Required Information indicator.
- System Status:** 20°C Partly cloudy, ENG IN, 08:59 PM, 05-01-2025.

The screenshot shows the Salesforce Setup interface for creating a new field. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The main area is titled 'consumer' under 'SETUP > OBJECT MANAGER'. A modal window is open for 'FIELD INFORMATION' for the field 'consumer_Status'. The 'Field Label' is set to 'consumer_Status' and the 'Field Name' is 'consumer_Status'. The 'Data Type' is 'Picklist'. The 'Available' section contains 'PII', 'HIPAA', 'GDPR', and 'PCI', while the 'Chosen' section is empty. Under 'General Options', the 'Required' checkbox is checked, and the 'Default Value' is set to 'Show Formula Editor'. A note below explains formula syntax. The bottom right of the modal shows 'ENG IN 08:54 PM 05-01-2025'.

The screenshot shows the Salesforce Setup interface displaying the list of fields for the 'consumer' object. The left sidebar shows the 'Fields & Relationships' section selected. The main area is titled 'consumer' under 'SETUP > OBJECT MANAGER'. A table lists the fields:

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		

The bottom right of the screen shows 'ENG IN 09:27 PM 05-01-2025'.

Laptop Bookings

Fields & Relationships

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 is required on all detail records.
- The ownership and visibility of all detail records 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.

Picklist

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 pop-up calendar.

Date/Time

Allows users to enter a date and time, or pick a date from a pop-up 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.

Laptop Bookings

Field Information

General Options

Field Label: Laptop Names
Field Name: Laptop_Names
Data Type: Picklist
Description:
Help Text:
Data Owner: User
Field Usage: --None--
Data Sensitivity Level: --None--
Compliance Categorization:

Available	Chosen
PII	
HIPAA	
GDPR	
PCI	

Required: Always require a value in this field in order to save a record
Default Value: Show Formula Editor

Use formula syntax: Enclose text and picklist value API names in double quotes ('the_text'), include numbers without quotes (25), show percentages as decimals (.010), and express date calculations in the standard format (Today() = 7). To reference a field name, use {!FieldName} and {!CustomFieldname}. Time... and RecordRefName. See...

20°C Partly cloudy

Search ENG IN 08:57 PM 05-01-2025

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

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 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 locations. 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 select multiple values 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.

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.

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

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

Field Label: Core Type

Values:

Use global picklist value set

Enter values, with each value separated by a new line

core_3
core_5
core_1
Bionic Chip

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: Core_Type

Description: Core_Type

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 Home Object Manager

Q Search Setup

App Manager External Client Apps

External Client App Manager

Didn't find what you're looking for? Try using Global Search.

Edit Field Dependency

Help for this Page

Controlling Field Laptop Names
Dependent Field Core Type

Instructions

- Double click on a cell to toggle its visibility for the Controlling Field value shown in the column heading.
- To change multiple cells at once, select multiple cells and then click the Include Values or Exclude Values button to change the visibility of all selected cells at once.
- Use SHIFT + click to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent.
- Use the Preview button to test the results.

Legend

Excluded Value
Included Value

Click button to include or exclude selected values from the dependent picklist:

Include Values Exclude Values

Showing Columns: 1 - 4 (of 4) < Previous Next > View All Go to				
Laptop Names:	Dell	Acer	Hp	Mac
Core Type:	core i3 core i5 core i7 Bionic Chip			

Click button to include or exclude selected values from the dependent picklist:

Include Values Exclude Values

Save Cancel Preview

Setup Home Object Manager

Search Setup

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

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 pop-up 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 all detail records is determined by the master record.
- When a user deletes a 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 pop-up calendar.

DateTime

Allows users to enter a date and time, or pick a date from a pop-up 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.

The screenshot shows the Salesforce Setup interface for creating a new relationship between 'Laptop Bookings' and 'consumer'. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main panel is titled 'New Relationship' and is on 'Step 2. Choose the related object'. It shows a dropdown menu set to 'consumer'. Navigation buttons 'Previous', 'Next', and 'Cancel' are at the bottom.

The screenshot shows the Salesforce Setup interface for creating a new relationship between 'Laptop Bookings' and 'consumer'. The left sidebar lists various setup categories. The main panel is titled 'New Relationship' and is on 'Step 3 of 6'. It shows fields for 'Field Label' (Consumer), 'Field Name' (Consumer), 'Description' (empty), and 'Help Text' (empty). Under 'Sharing Setting', 'ReadWrite' is selected. Under 'Allow reparenting', 'Auto add to custom report type' is checked. A 'Lookup Filter' section at the bottom has a note about creating a filter for the lookup field. Navigation buttons 'Previous', 'Next', and 'Cancel' are at the bottom.

The screenshot shows the Salesforce Setup interface. At the top, there's a blue header bar with the Salesforce logo, a search bar containing "Search Setup", and various global navigation icons. Below the header, the page title is "SETUP > OBJECT MANAGER Laptop Bookings". On the left, a sidebar lists navigation options like 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, and Triggers. The main content area is titled "Fields & Relationships" and contains a list of relationship types with descriptions and examples:

- 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 master record is the source of values for all detail records.
 - 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.

Laptop Bookings

Fields & Relationships

- Lookup Relationship
- Master-Detail Relationship
- External Lookup Relationship
- checkbox
- Currency
- Date
- dateTime
- Email
- geolocation
- Number
- Percent
- Phone
- Picklist
- Picklist (Multi-Select)
- Text
- Text Area
- Text Area (Long)
- Text Area (Rich)

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 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 master record is deleted, 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 pop-up 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 enter def locatons. 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 select multiple values 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.

SETUP > OBJECT MANAGER

Laptop Bookings

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 2. Enter the details

Field Label: **Amount**

Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".

Length: **18** Number of digits to the left of the decimal point

Decimal Places: **0** Number of digits to the right of the decimal point

Field Name: **Amount**

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](#)

Use formula syntax: Enclose text and picklist value API names in double quotes ("the_text"), include numbers without quotes : (25), show percentages as decimal (.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: \$customMetadataType__inst\$RecordName\$Field__c

SETUP > OBJECT MANAGER

Laptop Bookings

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

New Relationship

Step 2. Choose the related object

Select the other object to which this object is related.

Related to: **Total laptops**

Fields & Relationships				
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)		✓

SETUP > OBJECT MANAGER
Total Laptops

Details	Fields & Relationships
Page Layouts	New Custom Field
Lightning Record Pages	Step 1. Choose the field type
Buttons, Links, and Actions	Specify the type of information that the custom field will contain.
Compact Layouts	
Field Sets	Data Type
Object Limits	<input type="radio"/> None Selected Select one of the data types below.
Record Types	<input type="radio"/> Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
Related Lookup Filters	<input type="radio"/> 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.
Search Layouts	<input checked="" type="radio"/> 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.
List View Button Layout	<input type="radio"/> 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.
Restriction Rules	<input type="radio"/> 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.
Scoping Rules	<input type="radio"/> 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.
Object Access	<input type="radio"/> Checkbox Allows users to select a True (checked) or False (unchecked) value.
Triggers	<input type="radio"/> 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.

The screenshot shows the Salesforce Setup interface for creating a new custom field. The page title is "Total Laptops" under "SETUP > OBJECT MANAGER". The left sidebar is titled "Fields & Relationships" and includes options like Details, 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, and Triggers. The main content area is titled "New Custom Field" and "Step 2. Enter the details". It contains fields for "Field Label" (Laptops delivered), "Field Name" (Laptops_delivered), "Description", and "Help Text". A checkbox "Auto add to custom report type" is checked, with a note "Add this field to existing custom report types that contain this entity". Navigation buttons at the bottom include "Previous", "Next", and "Cancel".

The screenshot shows the Salesforce Setup interface for defining a summary calculation. The page title is "Total Laptops" under "SETUP > OBJECT MANAGER". The left sidebar is titled "Fields & Relationships" and includes the same list of options as the previous screenshot. The main content area is titled "New Custom Field" and "Step 3. Define the summary calculation". It contains sections for "Select Object to Summarize" (Master Object: Total Laptops, Summarized Object: Laptop Bookings), "Select Roll-Up Type" (radio button selected for COUNT), "Field to Aggregate" (None), and "Filter Criteria" (radio button selected for "All records should be included in the calculation"). Navigation buttons at the bottom include "Previous", "Next", and "Cancel". A note "Required Information" is displayed above the "Select Object to Summarize" section.

Setup Home 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

Step 1 Next Cancel Help for this Page

Setup Home 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
- Options

Decimal Places Example: 999

Step 2 of 5 Previous Next Cancel

The screenshot shows the Salesforce Setup interface under the Object Manager for the 'Laptop Bookings' object. The left sidebar lists various setup categories like Page Layouts, Lightning Record Pages, and Fields & Relationships. The main area is titled 'New Custom Field' and 'Step 3. Enter formula'. It contains a text input field with the formula '\$0 - Total_No_of_Laptops__r.laptops_delivered__c'. A dropdown menu labeled 'Functions' is open, showing options like ABS, ACOS, ADDMONTHS, AND, ASCII, and ASIN. A 'Quick Tips' sidebar on the right provides links to 'Getting Started' and 'Operators & Functions'.

The screenshot shows the Salesforce Setup interface under the Object Manager for the 'Laptop Bookings' object. The left sidebar lists various setup categories. The main area is titled 'Fields & Relationships' and shows a list of field types. The 'Picklist' type is selected, highlighted with a blue border. A detailed description of the Picklist field is provided, stating it creates a relationship that links the object to an external object. Other field types listed include Checkbox, Currency, Date, Date/Time, Email, Geolocation, Number, Percent, Phone, Text, Text Area, Text Area (Long), Text Area (Rich), Text (Encrypted), Time, and URL.

Laptop Bookings

Step 2. Enter the details

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

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

Step 2 of 4

Previous Next Cancel

Billing Process

Step 1. Choose the field type

Data Type:

- None Selected
- Auto Number
- Formula
- Roll-Up Summary
- Lookup Relationship
- Master-Detail Relationship
- External Lookup Relationship

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 is required on all detail records.
- The master record is deleted if all detail records are deleted.
- When a user deletes the master record, all detail records are deleted.
- You can create roll-up summary fields on the master record to summarize the detail records.

External Lookup Relationship:

- Checkbox
- Currency
- Date
- Date/Time

Step 1

Next Cancel

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. A sidebar on the left lists various setup categories. The main area displays the 'Billing Process' object's details, specifically the 'Fields & Relationships' section. A wizard titled 'New Relationship' is open, showing 'Step 2. Choose the related object'. It asks to select the other object related to the Billing Process, with 'consumer' selected in the dropdown. Navigation buttons for 'Previous', 'Next', and 'Cancel' are visible at the bottom of the wizard steps.

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. A sidebar on the left lists various setup categories. The main area displays the 'Billing Process' object's details, specifically the 'Fields & Relationships' section. A wizard titled 'New Custom Field' is open, showing 'Step 1. Choose the field type'. It asks to specify the type of information for the custom field, with 'Lookup Relationship' selected. Other options like 'Auto Number', 'Formula', 'Roll-Up Summary', 'Master-Detail Relationship', 'External Lookup Relationship', 'Checkbox', and 'Currency' are also listed with their descriptions. Navigation buttons for 'Next' and 'Cancel' are visible at the bottom of the wizard steps.

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'. It asks to 'Choose the related object' and has a dropdown set to 'Laptop Bookings'. Navigation buttons 'Previous', 'Next', and 'Cancel' are at the bottom.

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'. It asks to 'Enter the label and name for the lookup field'. Fields include 'Field Label' (Laptop Booking), 'Field Name' (laptop_booking), 'Description', and 'Help Text'. Under 'Child Relationship Name', it shows 'Billing_Process'. It also includes sections for 'Required', 'What to do if the lookup record is deleted', and 'Auto add to custom report type'. A 'Lookup Filter' section at the bottom allows optional filtering of records. Navigation buttons 'Previous', 'Next', and 'Cancel' are at the bottom.

The screenshot shows the Salesforce Setup interface under the Object Manager. A new object named "Total Laptops" is being created. In the "Fields & Relationships" section, a formula field is being defined with the formula `50 - Laptops_delivered__c`. The formula editor includes a "Check Syntax" button which indicates no syntax errors.

The screenshot shows the Salesforce Setup interface under the Object Manager. A validation rule is being created for the "consumer" object. The rule is named "Phonenumberoremailblankrule" and is active. The error condition formula is `OR(ISBLANK(phone_number__c) , ISBLANK(email__c))`. The formula editor includes a "Check Syntax" button which indicates no errors found.

Owner Profile :

The screenshot shows the Salesforce Setup interface under the Profiles section. A modal window titled "Clone Profile" is open, prompting the user to enter a new profile name. The "Existing Profile" dropdown is set to "Standard User". The "Profile Name" field contains "Owned". Below the form are "Save" and "Cancel" buttons.

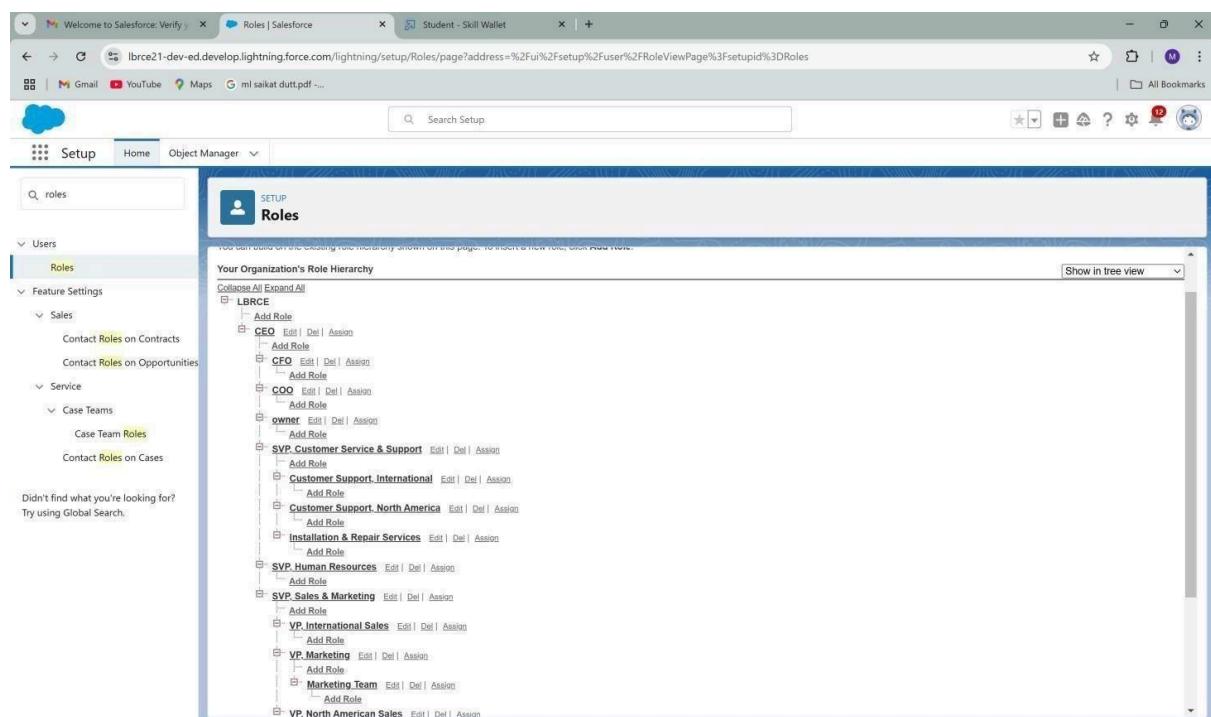
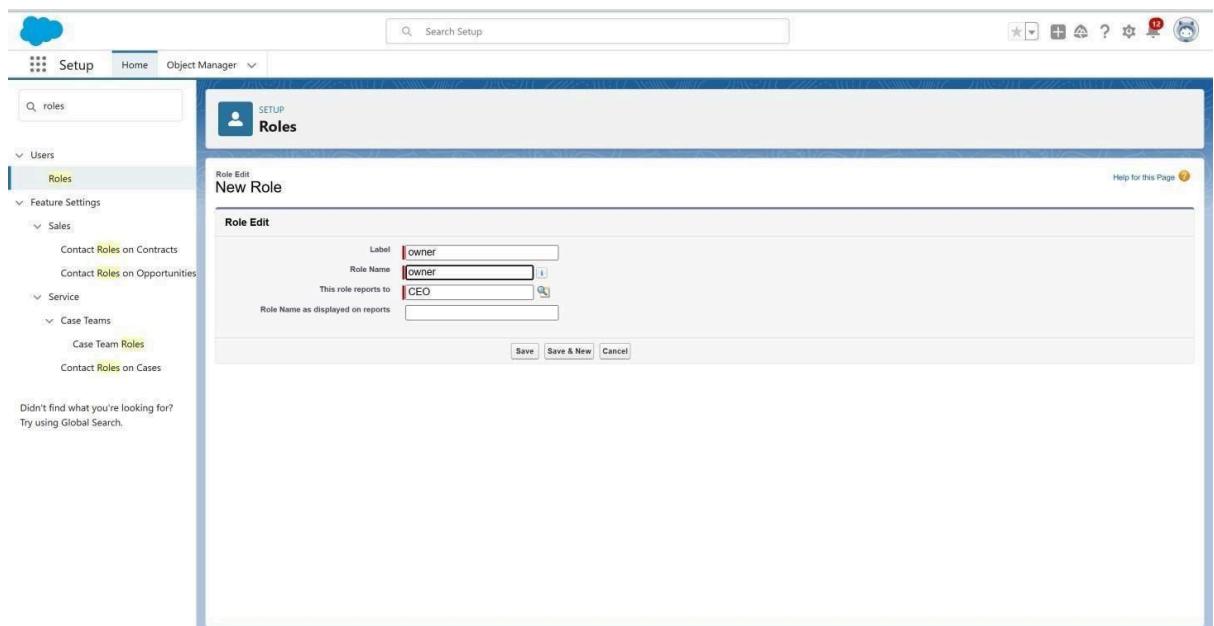
The screenshot shows the main profile configuration screen. It includes sections for "Custom Object Permissions" (with tables for Billing Process and consumer), "Session Settings" (with a dropdown for "Session Times Out After" set to "2 hours of inactivity"), and "Password Policies". The "Basic Access" and "Data Administration" columns for various objects like Finance Balance Snapshots, Ideas, and Work Types are shown with checkboxes indicating permission levels.

Agent Profile :

The screenshot shows the Salesforce Setup interface for cloning a profile. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar shows 'Users' and 'Profiles'. The main content area is titled 'Clone Profile' and displays a form to clone the 'Standard Platform User' profile into a new profile named 'Agent'. The 'User License' is set to 'Salesforce Platform'. Buttons for 'Save' and 'Cancel' are at the bottom.

The screenshot shows the Salesforce Setup interface for managing profiles. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar shows 'Users' and 'Profiles'. The main content area displays a grid of object permissions for various standard objects like Contacts, Push Topics, Sellers, etc. Below this is a section for 'Custom Object Permissions' for 'Billing Process' and 'consumer' objects. Further down are sections for 'Session Settings' (session times out after 2 hours of inactivity) and 'Password Policies' (user passwords expire in 90 days, enforce password history of 3, minimum password length of 8, etc.).

Creating owner Role:

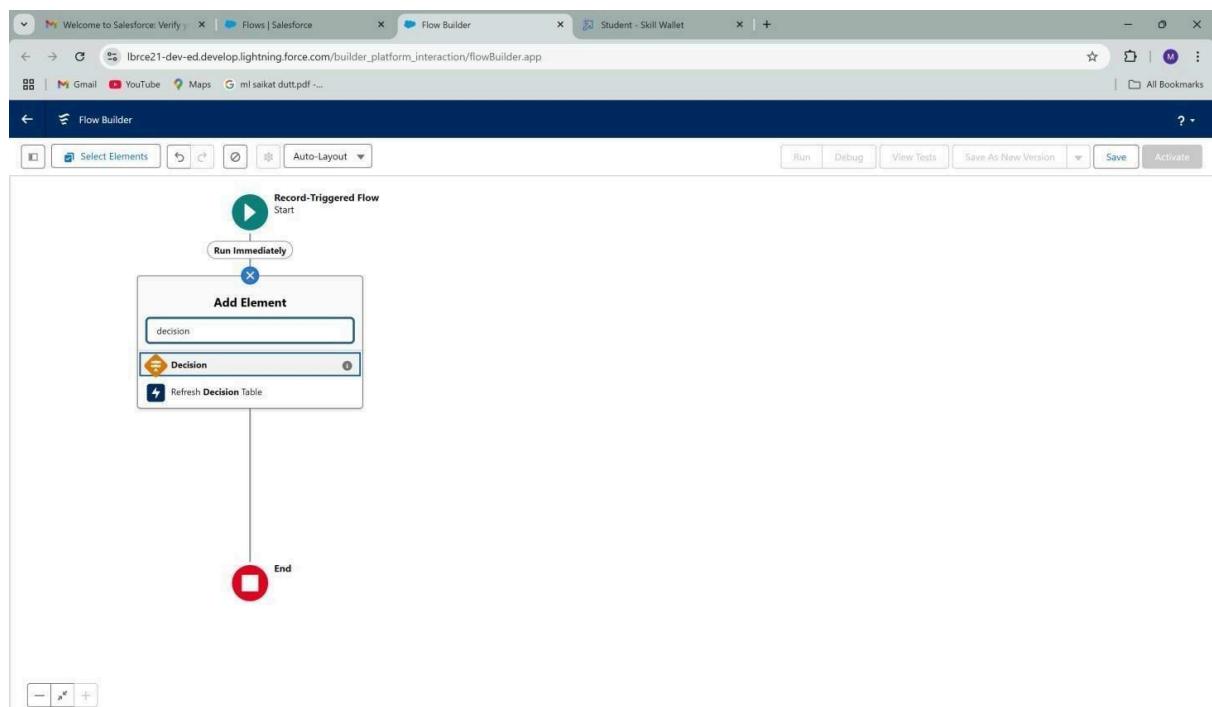
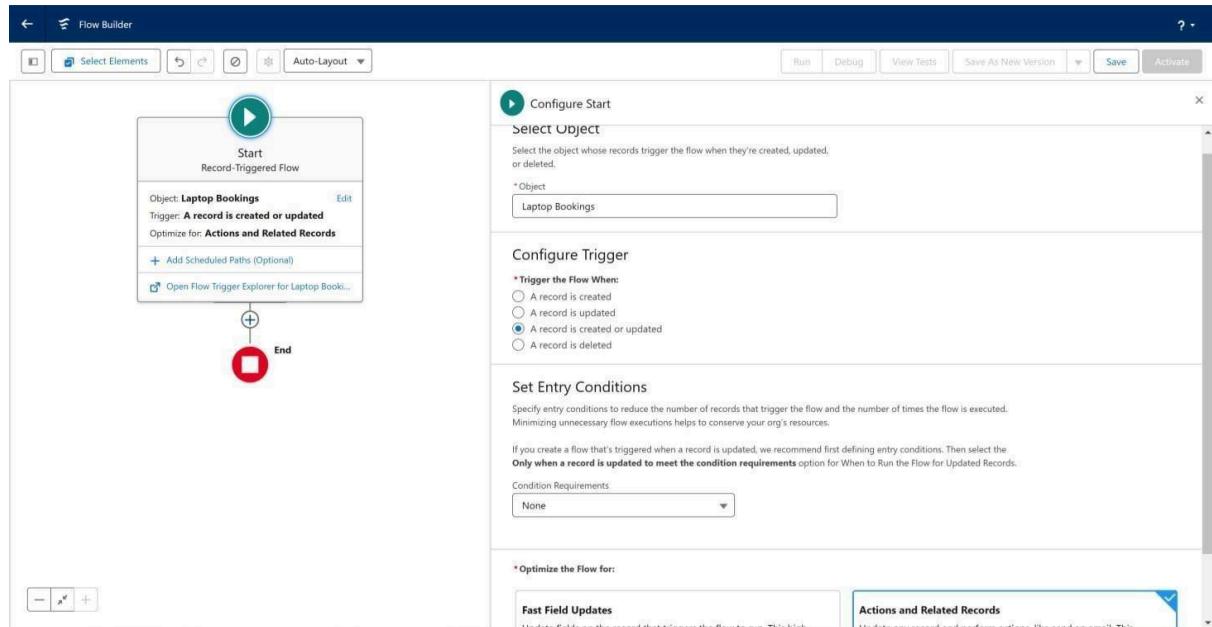


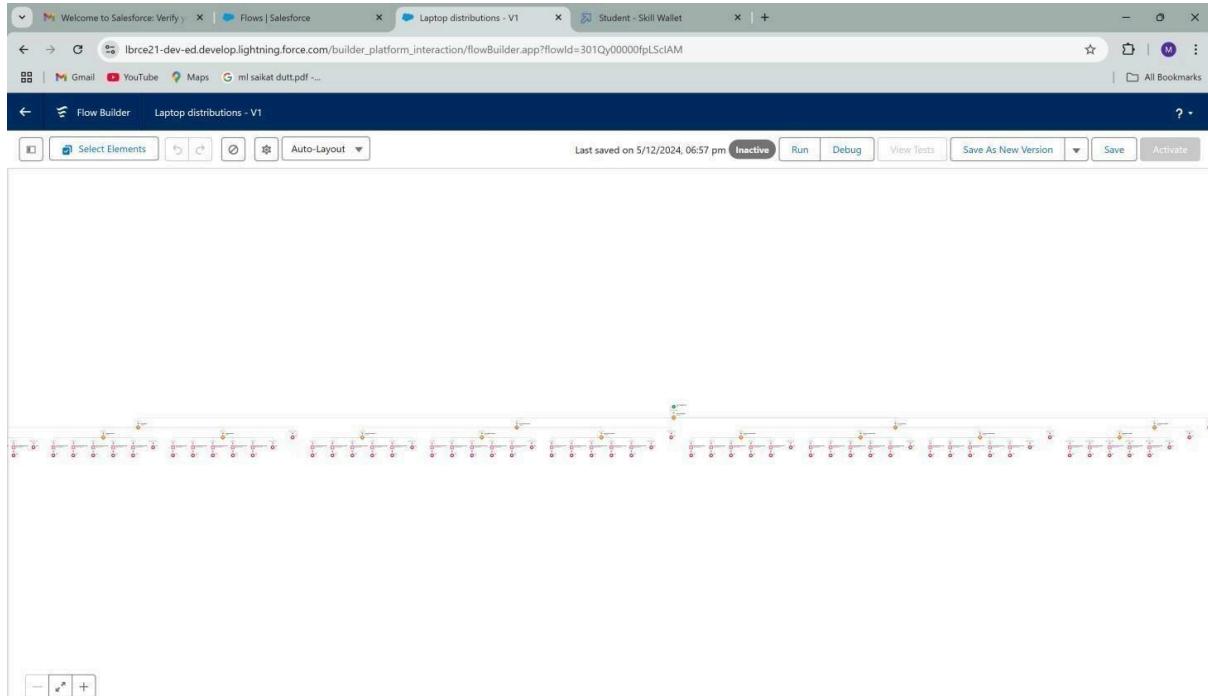
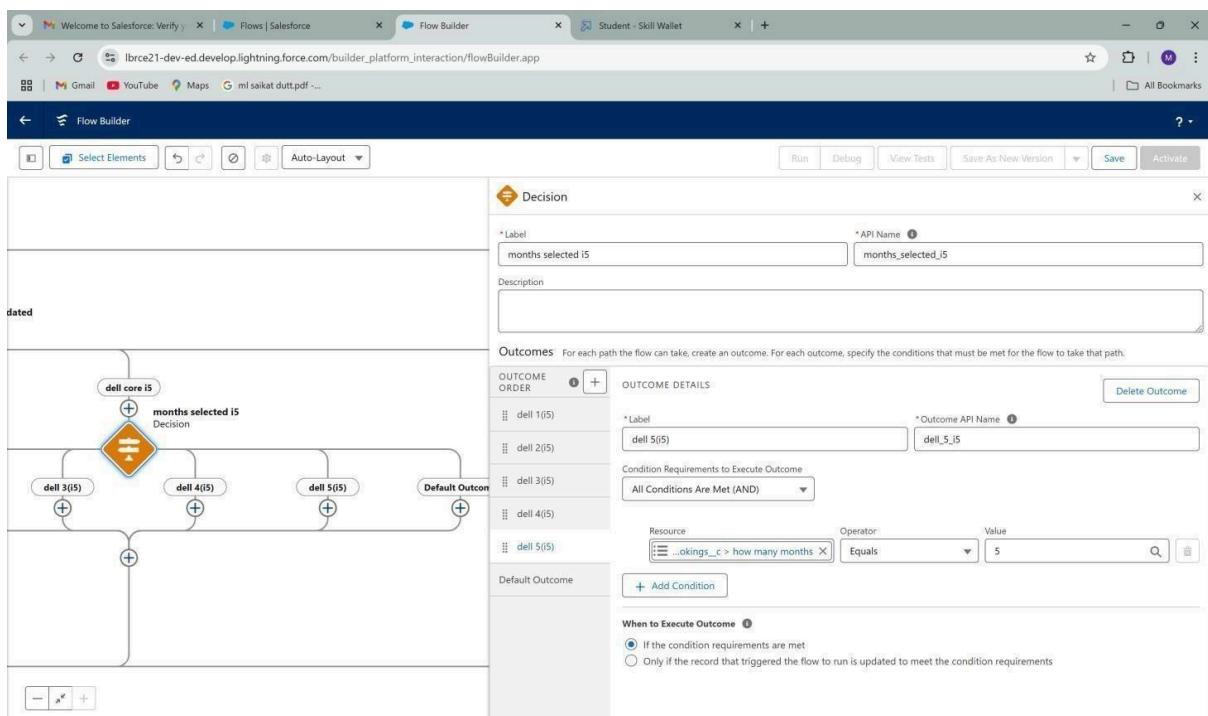
Create User :

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. A search bar at the top left contains the text 'user'. The main area displays the 'User Edit' screen for a new user named 'vicky'. The 'General Information' section includes fields for First Name ('vicky'), Last Name ('y'), Alias ('vicky'), Email ('rajumullangi5@gmail.com'), Username ('rajumullangi5@gmail.com'), Nickname ('User17339737482299603'), Title (empty), Company (empty), Department (empty), and Division (empty). On the right side, under 'Role', 'owner' is selected. Under 'User License', 'Salesforce' is selected. Under 'Profile', 'OWNER' is selected. The 'Active' checkbox is checked. Other optional settings like Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Data.com User Type, Data.com Monthly Addition Limit, Accessibility Mode (Classic Only), High-Contrast Palette on Charts, Load Lightning Pages While Scrolling, Debug Mode, and Quick Access Menu are also visible.

This screenshot shows the same 'User Edit' screen as the previous one, but for a new user named 'ram'. The 'General Information' section has 'ram' entered in all primary fields (First Name, Last Name, Alias, Email, Username, Nickname). The 'Role' dropdown now shows 'Agent'. The 'User License' dropdown shows 'Salesforce Platform'. The 'Profile' dropdown shows 'Agent'. All other settings remain the same as in the first screenshot.

Flows :





Result :

in:spam

Welcome to our company Spam x

Jnana Prasanna Dhanani via 7kvp07skwlvdcch.c3qvw.dtm-hnk3ua.jndt36.bnc.salesforce.com to me 12:40 (3 hours ago)

Report as not spam

Dear Customer,
Welcome to Laptop Rentals! You have been seen as a valuable customer to us.
Please continue your journey with us, while we try to provide you with good quality resources.

Laptop Amount = null
core type = core i3
Laptop type = Dell

Reply Forward

Inbox 2,842
Starred
Snoozed
Sent
Drafts
Less
Important
Chats
Scheduled
All Mail
Spam 26
Bin
Categories
Social 789
Updates 3,456
Forums 36
Promotions 1,100
Manage labels
Create new label

Labels +

Create Report:

Report Name	Description	Folder	Created By	Created On	Subscribed
Sample Flow Report: Screen Flows	What screen 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	
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	
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	
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	
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	
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	

Create Report

Category

Recently Used

All

- Accounts & Contacts
- Opportunities
- Customer Support Reports
- Leads
- Campaigns
- Activities
- Contracts and Orders
- Price Books, Products and Assets

Select a Report Type

Showing results for lap

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

Details

Total Laptops with Laptop Bookings and Consumer
Standard Report Type

Start Report

Created By You

Laptop Analytics

Created By Others

No Reports Yet

Report Builder | Salesforce

LAPTOP RENTALS consumer with Laptop Bookings and Total Laptops

Edit Bucket Column

Field: Amount

Range	Bucket
<= 900	basic
> 900 to 1500	intermediate
> 1,500 to 10,000	high
> 10,000	very high

Treat empty Amount values in the report as zeros.

Cancel Apply

LAPTOP RENTALS consumer with Laptop Bookings and Total Laptops

New Report

Total Records: 15 Total Amount: ₹73,499

types of versions	consumer: consumer_Name	Laptop Bookings: Laptop Bookings Name	Total No Of Laptops: Total Laptops	Amount
intermediate (1)	Lucky	Vtu	1	₹1,000
abtotal				₹1,000
high (14)	Chaitanya	Chaitu	1	₹10,000
	Lucky	Sam	1	₹5,500
	Kiki	Kayani	1	₹5,000
	Chaitanya	Bunty	1	₹4,000
	Lucky	Lasya	1	₹5,000
	Kiranmayi	Dell123	1	₹1,999
	Kiki	Yahoo	1	₹2,000
	Lucky	Priyashma	1	₹10,000
	Kiranmayi	reto	1	₹8,000
	Kiki	salesforce	1	₹2,000
	Chaitanya	Kayani	3	₹4,000
	Chaitanya	Lucky	2	₹2,000
	Chaitanya	Chaitu	2	₹5,000
	Kiranmayi	IT Leaders	3	₹8,000
abtotal				₹72,499
rat (15)				₹73,499

Row Counts Detail Rows Subtotals Grand Total

The screenshot shows a Salesforce Lightning page for a report titled "Report: consumer with Laptop Bookings and Total Laptops". The report displays a table with columns for types of versions, consumer: consumer_Name, and Laptop Bookings: Laptop Booking. The table has 15 total records, with 1 intermediate record and 14 high records. The high records list various names like Chaitanya, Lucky, Kiki, etc., along with their respective booking details.

A modal window titled "Edit Subscription" is open. It contains settings for the subscription, including:

- Frequency:** Weekly (selected)
- Days:** Mon (selected)
- Time:** 4:00 pm
- Attachment:** Attach File
- Recipients:** Run Report As Me (radio button selected)
- Conditions:** Add conditions to this report (checkbox)

At the bottom of the modal are "Cancel" and "Save" buttons.

Create Dashboard:

The screenshot shows a Salesforce Lightning dashboard titled "data analytics of laptops". The dashboard includes the following components:

- Dashboard Title:** data analytics of laptops
- Sub-Title:** total amount of data in dashboards
- Timestamp:** As of 06-Jan-2025, 12:52 pm Viewing as Jnana Prasanna Dhanani
- Report Section:** A "New Report" section with a donut chart. The chart shows a single data point with a value of ₹73k. A legend indicates two categories: "high" (blue) and "Other" (light blue).
- Report Navigation:** View Report (New Report)
- Recent Reports:** A sidebar showing recent reports: "data analytics of laptops" and "Sample Flow Report: Scree..."