

Project Report

Project Title: Laptop Rental System

Platform: Salesforce

Name: Mullangi Raju

College: LBRCE

Mail: rajumullangi5@gmail.com

Abstract

The Laptop Rental System is a comprehensive application developed on the Salesforce platform to streamline the process of renting laptops. This system aims to cater to both customers and rental service providers, offering a seamless interface for browsing, booking, managing inventory, and tracking rentals. By leveraging Salesforce's robust CRM capabilities, the application ensures efficient customer management, real-time updates, and analytics to optimize rental operations.

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.

New Custom Object

Custom Object Definition Edit

Custom Object Information

Label: Total Laptops Example: Account

Plural Label: Total Laptops Example: Accounts

Starts with vowel sound:

The Object Name is used when referencing the object via the API.

Object Name: Total_Laptops Example: Account

Description:

Context-Sensitive Help Setting

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: Total Laptops Example: Account Name

Data Type: Text

Optional Features

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

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. Learn more.

Allow Sharing Allow Bulk API Access Allow Streaming API Access

Deployment Status

In Development Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. Learn more.

Allow Search

Object Creation Options (Available only when custom object is first created)

Add Notes and Attachments related list to default page layout Launch New Custom Tab Wizard after saving this custom object

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: Total Laptops Example: Account Name

Data Type: Text 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 Allow Track Field History Allow in Chatter Groups Enable Licensing

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. Learn more.

Allow Sharing Allow Bulk API Access Allow Streaming API Access

Deployment Status

In Development Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. Learn more.

Allow Search

Object Creation Options (Available only when custom object is first created)

Add Notes and Attachments related list to default page layout Launch New Custom Tab Wizard after saving this custom object

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.

Welcome to Salesforce: Verify | New Custom Object | Salesforce | Student - Skill Wallet

lbrc21-dev-ed.lightning.force.com/lightning/setup/ObjectManager/new

Setup Home Object Manager

New Custom Object

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: consumer_name Example: Account Name

Data Type: Text 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

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#).

- Allow Sharing
- Allow Bulk API Access
- Allow Streaming API Access

Deployment Status

- In Development
- Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more](#).

- Allow Search

Object Creation Options (Available only when custom object is first created)

- Add Notes and Attachments related list to default page layout
- Launch New Custom Tab Wizard after saving this custom object

Welcome to Salesforce: Verify | consumer | Salesforce | Student - Skill Wallet

lbrc21-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lQy000002KjyD/Details/view

Setup Home Object Manager

SETUP > OBJECT MANAGER consumer

Details

Details	
Fields & Relationships	Description
Page Layouts	API Name consumer_c
Lightning Record Pages	Custom ✓
Buttons, Links, and Actions	Singular Label consumer
Compact Layouts	Plural Label consumer
Field Sets	
Object Limits	
Record Types	
Related Lookup Filters	
Search Layouts	
List View Button Layout	
Restriction Rules	
Scoping Rules	
Object Access	
Triggers	
	Enable Reports ✓
	Track Activities
	Track Field History ✓
	Deployment Status Deployed
	Help Settings Standard salesforce.com Help Window

Edit **Delete**

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.

New Custom Object

Custom Object Definition Edit

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label: Laptop Bookings Example: Account

Plural Label: Laptop Bookings Example: Accounts

Starts with vowel sound:

The Object Name is used when referencing the object via the API.

Object Name: Laptop_Bookings 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: Laptop Bookings Example: Account Name

Data Type: Text

Optional Features

Allow Reports

Allow Activities

Track Field History

Allow in Chatter Groups

Enable Licensing

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. Learn more.

Allow Sharing

Allow Bulk API Access

Allow Streaming API Access

Deployment Status

In Development

Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. Learn more.

Allow Search

Object Creation Options (Available only when custom object is first created)

Add Notes and Attachments related list to default page layout

Launch New Custom Tab Wizard after saving this custom object

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: Laptop Bookings Example: Account Name

Data Type: Text

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

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. Learn more.

Allow Sharing

Allow Bulk API Access

Allow Streaming API Access

Deployment Status

In Development

Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. Learn more.

Allow Search

Object Creation Options (Available only when custom object is first created)

Add Notes and Attachments related list to default page layout

Launch New Custom Tab Wizard after saving this custom object

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.

Welcome to Salesforce: Verify y New Custom Object | Salesforce Student - Skill Wallet

lbrc21-dev-ed.lightning.force.com/lightning/setup/ObjectManager/new

Gmail YouTube Maps ml saikat dutt.pdf

SETUP New Custom Object

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: **Billing ProcessName** Example: Account Name

Data Type: **Text** 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

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#).

- Allow Sharing
- Allow Bulk API Access
- Allow Streaming API Access

Deployment Status

In Development
 Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more](#).

- Allow Search

Object Creation Options (Available only when custom object is first created)

- Add Notes and Attachments related list to default page layout.
- Launch New Custom Tab Wizard after saving this custom object

Welcome to Salesforce: Verify y Billing Process | Salesforce Student - Skill Wallet

lbrc21-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lQy000002KKb/Details/view

Gmail YouTube Maps ml saikat dutt.pdf

SETUP > OBJECT MANAGER

Billing Process

Details

Details	
Description	
API Name	Billing_Process__c
Custom	<input checked="" type="checkbox"/>
Singular Label	Billing Process
Plural Label	Billing Process
Enable Reports	
<input checked="" type="checkbox"/>	
Track Activities	
<input checked="" type="checkbox"/>	
Track Field History	
<input checked="" type="checkbox"/>	
Deployment Status	
Deployed	
Help Settings	
Standard salesforce.com Help Window	

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

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.

The screenshot shows the 'New Custom Object Tab' wizard in the Salesforce Setup. The left sidebar is collapsed, and the main area displays the first step of the wizard:

Step 1. Enter the Details

Choose the custom object for this new custom tab. Fill in other details.

New Custom Object Tab

Select an existing custom object or **create a new custom object now**.

Object: Total Laptops

Tab Style: Computer

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link: None

Enter a short description.

Description: [Empty text area]

Buttons at the bottom: Next | Cancel

The screenshot shows the 'New Custom Object Tab' wizard in the Salesforce Setup, specifically Step 2: Add to Profiles.

Step 2. Add to Profiles

Choose the user profiles for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each profile.

Apply one tab visibility to all profiles (Default On)

Apply a different tab visibility for each profile

Profile	Tab Visibility
Analytics Cloud Integration User	[Default On]
Analytics Cloud Security User	[Default On]
Authenticated Website	[Default On]
Authenticated Website	[Default On]
B2B Reordering Portal Buyer Profile	[Default On]
Contract Manager	[Default On]
Cross Org Data Proxy User	[Default On]
Custom: Marketing Profile	[Default On]
Custom: Sales Profile	[Default On]
Custom: Support Profile	[Default On]
Customer Community Login User	[Default On]
Customer Community Plus Login User	[Default On]
Customer Community Plus User	[Default On]
Customer Community User	[Default On]

Step 3. Add to Custom Apps

Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.

Custom App	Include Tab
Platform (standard_Platform)	<input type="checkbox"/>
Sales (standard_Sales)	<input checked="" type="checkbox"/>
Service (standard_Service)	<input type="checkbox"/>
Marketing CRM Classic (standard_Marketing)	<input type="checkbox"/>
Sample Console (standard_ServiceConsole)	<input type="checkbox"/>
High Volume Customer Portal User	<input type="checkbox"/>
Authenticated Website User	<input type="checkbox"/>
App Launcher (standard_AppLauncher)	<input type="checkbox"/>
Community (standard_Community)	<input type="checkbox"/>
Site.com (standard_Sites)	<input type="checkbox"/>
Salesforce Chatter (standard_Chatter)	<input type="checkbox"/>
Content (standard_Content)	<input type="checkbox"/>
Analytics Studio (standard_Insights)	<input type="checkbox"/>
Sales Console (standard_LightningSalesConsole)	<input type="checkbox"/>
Service Console (standard_LightningService)	<input type="checkbox"/>
Sales (standard_LightningSales)	<input type="checkbox"/>
Lightning Usage App (standard_LightningInstrumentation)	<input type="checkbox"/>

Step 3. Add to Custom Apps

Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.

Custom App	Include Tab
Authenticated Website User	<input type="checkbox"/>
App Launcher (standard_AppLauncher)	<input type="checkbox"/>
Community (standard_Community)	<input type="checkbox"/>
Site.com (standard_Sites)	<input type="checkbox"/>
Salesforce Chatter (standard_Chatter)	<input type="checkbox"/>
Content (standard_Content)	<input type="checkbox"/>
Analytics Studio (standard_Insights)	<input type="checkbox"/>
Sales Console (standard_LightningSalesConsole)	<input type="checkbox"/>
Service Console (standard_LightningService)	<input type="checkbox"/>
Sales (standard_LightningSales)	<input type="checkbox"/>
Lightning Usage App (standard_LightningInstrumentation)	<input type="checkbox"/>
Digital Experiences (standard_SalesforceCMS)	<input type="checkbox"/>
Queue Management (standard_QueueManagement)	<input checked="" type="checkbox"/>
Data Manager (standard_DataManager)	<input type="checkbox"/>
Subscription Management (standard_RevenueCloudConsole)	<input type="checkbox"/>
Business Rule Engine (standard_ExpressionSetConsole)	<input type="checkbox"/>
Salesforce Scheduler Setup (standard_LightningScheduler)	<input type="checkbox"/>
Bolt Solutions (standard_LightningBolt)	<input type="checkbox"/>
Automation (standard_FlowsApp)	<input type="checkbox"/>

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 .

Welcome to Salesforce: Verify | Tabs | Salesforce | Student - Skill Wallet

lbrc21-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3FretURL%3D%252Fsetup%252Fcustomtabs.jsp%... | All Bookmarks

Setup Home Object Manager

Search Setup

TAB

Feature Settings

- Analytics
- Tableau
 - Tableau Embedding
- Decision Tables

User Interface

- Loaded Console Tab Limit
- Rename Tabs and Labels
- Tabs**

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

SETUP Tabs

New Custom Object Tab

Step 1. Enter the Details Step 1 of 3

Choose the custom object for this new custom tab. Fill in other details.

New Custom Object Tab

Select an existing custom object or [create a new custom object now](#).

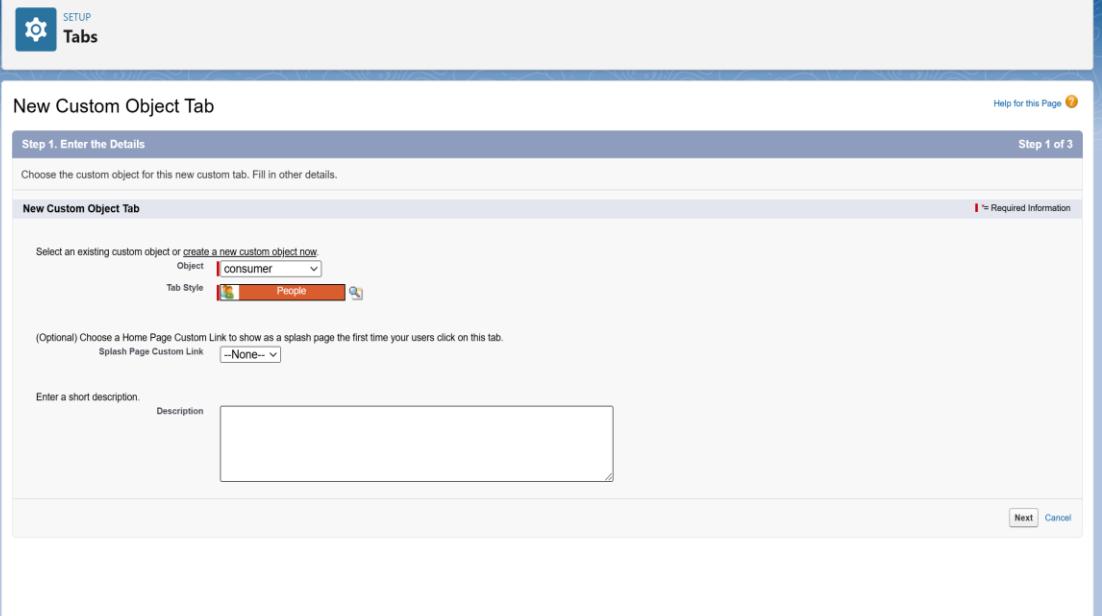
Object: consumer

Tab Style: People

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.
Splash Page Custom Link: None

Description:

Next Cancel



Welcome to Salesforce: Verify | Tabs | Salesforce | Student - Skill Wallet

lbrc21-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3FretURL%3D%252Fsetup%252Fcustomtabs.jsp%... | All Bookmarks

Setup Home Object Manager

Search Setup

TAB

Feature Settings

- Analytics
- Tableau
 - Tableau Embedding
- Decision Tables

User Interface

- Loaded Console Tab Limit
- Rename Tabs and Labels
- Tabs**

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

SETUP Tabs

New Custom Object Tab

Step 1. Enter the Details Step 1 of 3

Choose the custom object for this new custom tab. Fill in other details.

New Custom Object Tab

Select an existing custom object or [create a new custom object now](#).

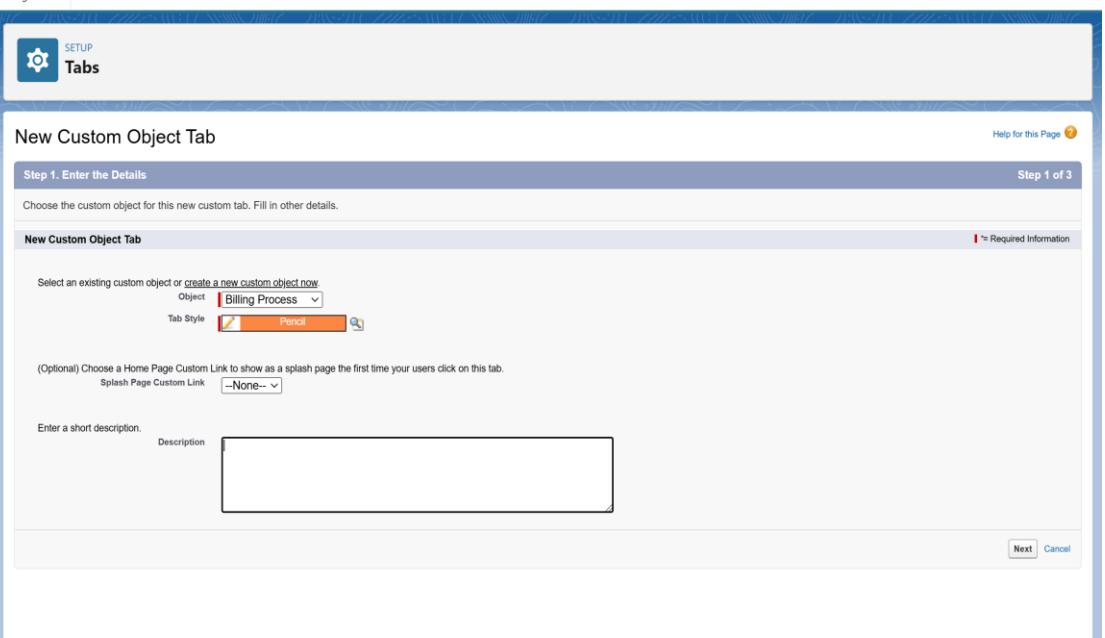
Object: Billing Process

Tab Style: Pencil

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.
Splash Page Custom Link: None

Description:

Next Cancel



Welcome to Salesforce: Verify | Tabs | Salesforce | Student - Skill Wallet | +

lbrc21-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3FretURL%3D%252Fsetup%252Fu%252Fcustomtabs.jsp%...

Search Setup

Setup Home Object Manager

TAB

Feature Settings

Analytics

Tableau

Tableau Embedding

Decision Tables

User Interface

Loaded Console Tab Limit

Rename Tabs and Labels

Tabs

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

SETUP Tabs

New Custom Object Tab

Step 1. Enter the Details Step 1 of 3

Choose the custom object for this new custom tab. Fill in other details.

New Custom Object Tab

Select an existing custom object or [create a new custom object now](#).

Object: Laptop Bookings

Tab Style: Laptop

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.
Splash Page Custom Link: None

Enter a short description.

Description:

Next Cancel

Welcome to Salesforce: Verify | Tabs | Salesforce | Student - Skill Wallet | +

lbrc21-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2Fcustomtabs.jsp%3Fsetupid%3DCustomTabs%26retURL%3D%252Fsetup%252Fhome%26...

Search Setup

Setup Home Object Manager

TAB

Feature Settings

Analytics

Tableau

Tableau Embedding

Decision Tables

User Interface

Loaded Console Tab Limit

Rename Tabs and Labels

Tabs

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

SETUP Tabs

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 allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs

Action	Label	Tab Style	Description
Edit Del	Billing Process	Pencil	
Edit Del	consumer	People	
Edit Del	Laptop Bookings	Laptop	
Edit Del	Total Laptops	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.

javascript:void(0)

Create a Lightning App

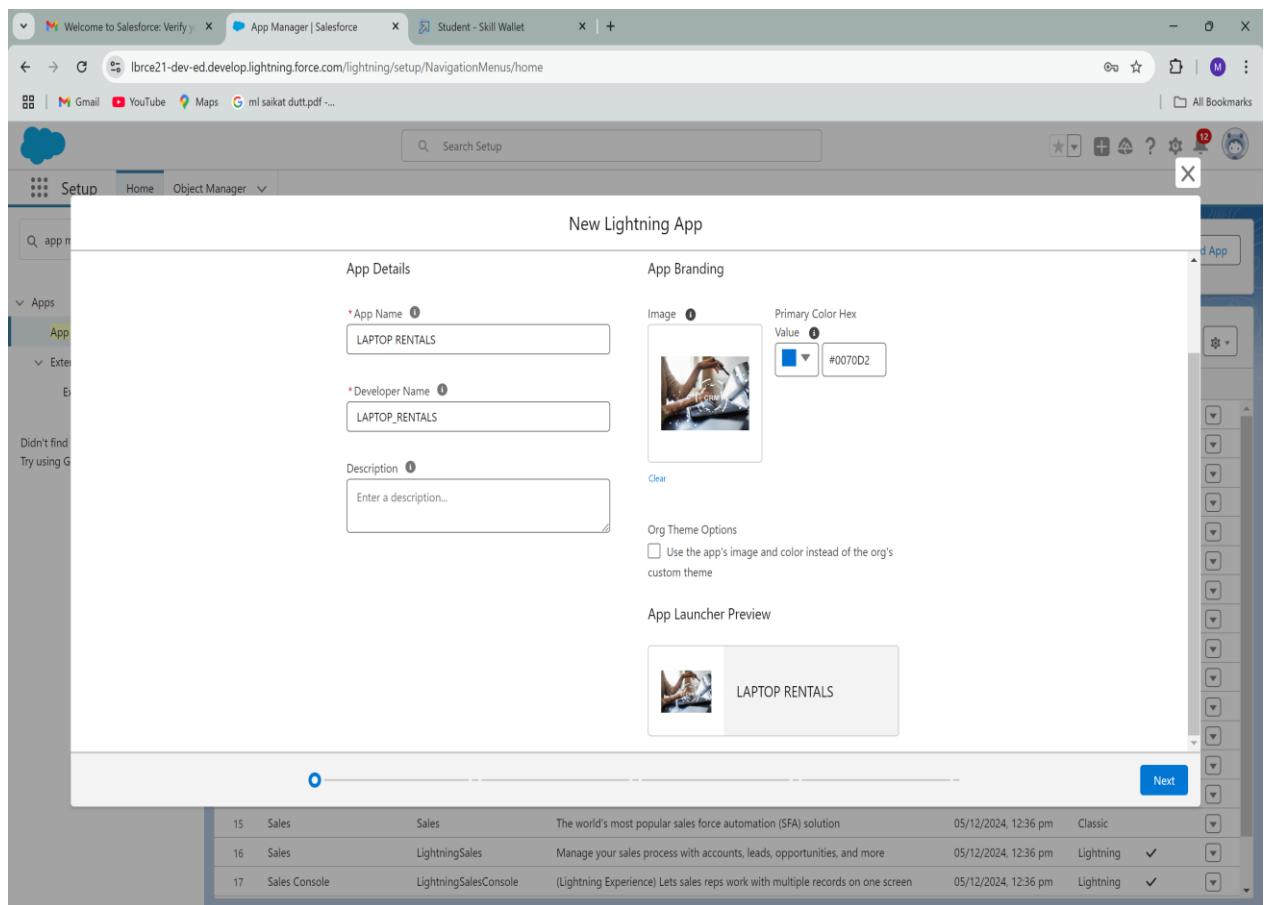
To create a lightning app page:

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.



The screenshot shows the 'New Lightning App' configuration interface. In the center, there's a section titled 'Navigation Items' with a sub-instruction: '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.' Below this, two lists are shown: 'Available Items' and 'Selected Items'. The 'Available Items' list includes: Accounts, All Sites, Alternative Payment Methods, Analytics, App Launcher, Appointment Categories, and Appointment Invitations. The 'Selected Items' list contains: Total Laptops, consumer, Laptop Bookings, and Billing Process. At the bottom, a progress bar indicates the current step is 'Navigation Items'.

Move system administrator from left to right:

The screenshot shows the 'New Lightning App' configuration interface. In the center, there's a section titled 'Choose the user profiles that can access this app.' Below this, two lists are shown: 'Available Profiles' and 'Selected Profiles'. The 'Available Profiles' list includes: sys (Salesforce API Only System Integrations). The 'Selected Profiles' list contains: System Administrator. At the bottom, a progress bar indicates the current step is 'Available Profiles'.

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.

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. Under the 'consumer' object, the 'Fields & Relationships' tab is active. A tooltip for the 'Phone' data type is displayed, detailing its use for entering phone numbers. The tooltip includes links to 'External Lookup Relationship', 'Checkbox', 'Currency', 'Date', 'DateTime', 'Email', 'Geolocation', 'Number', 'Percent', and 'URL'. The 'Phone' data type is highlighted with a blue border.

The screenshot shows the 'New Custom Field' configuration page for the 'consumer' object. It is on 'Step 2. Enter the details'. The 'Field Label' is set to 'Phone number', 'Field Name' is 'Phone_number', and 'Required' is checked. The 'Default Value' section contains a link to 'Show Formula Editor'. The sidebar lists various object settings like Page Layouts, Lightning Record Pages, and Buttons, Links, and Actions.

To create another fields in an object:

1. Go to setup >> click on Object Manager >> type object name(consumer) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as a “Email” and Click on Next
4. Fill the Above as following:
 - Field Label: Email
 - Field Name :It's gets auto generated
 - Click on Next >> Next >> Save and new.

The screenshot shows the Salesforce Object Manager interface. On the left, a sidebar lists various object settings like Details, Fields & Relationships, Page Layouts, etc. The 'Fields & Relationships' section is selected. In the main pane, the 'Email' field type is highlighted. A detailed description of the Email field is provided, stating it is 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. It also describes its relationship to other objects and its use in roll-up summaries.

The screenshot shows the 'Step 2: Enter the details' page for creating a new custom field. The field label is set to 'Email'. The field name is also 'Email'. The 'Required' checkbox is unchecked. Under 'Default Value', there is a formula editor with the placeholder text: 'Use formula syntax. Enclose text and picklist value API names in double quotes - ("the_text"), include numbers without quotes (20), show percentages as decimals (.01), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: \${CustomMetadataType__mdt.RecordAPIName.FieldName__c}'.

To create another fields in an object:

1. Go to setup >> click on Object Manager >> type object name(consumer) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as a “Text Area” and Click on Next
4. Fill the Above as following:
 - Field Label: Address
 - Field Name : It's gets auto generated
 - Select Required field.
 - Click on Next >> Next >> Save and new.

The screenshot shows the Salesforce Setup interface. In the top navigation bar, 'Setup' is selected. Below it, 'Object Manager' is chosen for the 'consumer' object. On the left, a sidebar lists various configuration options like Page Layouts, Lightning Record Pages, and Fields & Relationships. The 'Fields & Relationships' option is currently selected. A modal window is open, listing different field types: 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), Time, and URL. The 'Text Area' option is highlighted with a blue selection bar. At the bottom right of the modal, there are 'Next' and 'Cancel' buttons.

The screenshot shows the 'New Custom Field' configuration page. The title is 'consumer New Custom Field' and it indicates 'Step 2 of 4'. The left sidebar shows the same configuration options as the previous screenshot. The main form has 'Field Label' set to 'Address' and 'Field Name' set to 'Address'. Under 'Required', there is a checked checkbox. Under 'Auto add to custom report type', there is a checked checkbox. The 'Default Value' section contains a 'Show Formula Editor' button and a text input field with a formula placeholder: 'Use formula syntax. Enclose text and picklist values/API names in double quotes ("the_text"), include numbers without quotes : (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (today() + 7). To reference a field from a Custom Metadata type record use: \${CustomMetadataType__mdt.RecordAPIName.FieldName}'. At the bottom right, there are 'Previous', 'Next', and 'Cancel' buttons.

To create another fields in an object:

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

SETUP > OBJECT MANAGER
consumer

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Object Access

Triggers

External Lookup Relationship

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

Checkbox

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

Currency

Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Date

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

Datetime

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.

SETUP > OBJECT MANAGER
consumer

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Object Access

Triggers

Step 2. Enter the details

Field Label: consumer Status

Values: Use global picklist value set Enter values, with each value separated by a new line

Student
Employee
Others

Field Name: consumer_Status

Description:

Help Text:

Required: Always require a value in this field in order to save a record Add this field to existing custom report types that contain this entity

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

The screenshot shows the Salesforce Object Manager interface. The left sidebar lists various object settings like Details, Fields & Relationships, Page Layouts, etc. The main area is titled 'Laptop Bookings' and shows the 'Fields & Relationships' tab selected. It lists several field types: Master-Detail Relationship, External Lookup Relationship, Checkbox, Currency, Date, Date/Time, Email, Geolocation, Number, Percent, Phone, Picklist (selected), Picklist (Multi-Select), Text, Text Area, Text Area (Long), Text Area (Rich), and Text (Encrypted). Each type has a brief description below it.

The screenshot shows the 'Step 2. Enter the details' screen for creating a new field. The 'Field Label' is set to 'Laptop Names'. Under 'Values', the 'Enter values, with each value separated by a new line' option is selected, and the values 'Dell', 'Acer', 'Hp', and 'Mac' are entered into a text area. Other options like 'Display values alphabetically, not in the order entered' and 'Restrict picklist to the values defined in the value set' are available but not selected. The 'Field Name' is 'Laptop_Names', and the 'Description' and 'Help Text' fields are empty. At the bottom, 'Required' is checked, and 'Always require a value in this field in order to save a record' is selected. Other checkboxes for 'Auto add to custom report type' and 'Add this field to existing custom report types that contain this entity' are also present.

2. 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 “Picklist” and Label: Core Type
4. Picklist values are:-1.core i3 2. Core i5 3. Core i7 4.Bionic Chip .
5. Select required.
6. 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

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

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

Currency
Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

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

Date/Time
Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.

Email
Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

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

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

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

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

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

Picklist (Multi-Select)
Allows users to select multiple values from a list you define.

Text
Allows users to enter any combination of letters and numbers.

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

Text Area (Long)
Allows users to enter up to 131,072 characters on separate lines.

Text Area (Rich)
Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

Text (Encrypted)
Allows users to enter any combination of letters and numbers and store them in encrypted form.

Time
Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50:600" are all valid times for this field.

URL
Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

Next Cancel

SETUP > OBJECT MANAGER
Laptop Bookings

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Object Access

Triggers

Step 2. Enter the details Step 2 of 4

Field Label [i](#)

Values Use global picklist value set Enter values, with each value separated by a new line

Display values alphabetically, not in the order entered
 Use first value as default value [i](#)
 Restrict picklist to the values defined in the value set [i](#)

Field Name [i](#)

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 [i](#)

Previous Next Cancel

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 Booking) 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.

The screenshot shows the 'Edit Field Dependency' page in the Salesforce Setup. The 'Controlling Field' is set to 'Laptop Names' and the 'Dependent Field' is set to 'Core Type'. The grid below shows the relationship between laptop models and their core types. The 'Dell' row has 'core i3', 'core i5', and 'core i7' selected. The 'Acer' row has 'core i3', 'core i5', and 'core i7' selected. The 'Hp' row has 'core i3', 'core i5', and 'core i7' selected. The 'Mac' row has 'Bionic Chip' selected. A legend on the right indicates that yellow cells represent 'Included Value' and grey cells represent 'Excluded Value'.

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.

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

Data Type

None Selected

Auto Number

Formula

Roll-Up Summary

Lookup Relationship

Master-Detail Relationship

External Lookup Relationship

Checkbox

Currency

Date

Date/Time

Email

Geolocation

Number

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

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 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.
- You can't edit records on 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 locations. Includes latitude and longitude components, and can be used to calculate distance.

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

Welcome to Salesforce: Verify ... Laptop Bookings | Salesforce Student - Skill Wallet

lbrc21-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I0Qy000002KKPd/FieldsAndRelationships/new

All Bookmarks

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

New Relationship

Step 2. Choose the related object

Select the other object to which this object is related.

Related To

Help for this Page

Step 2 of 6

Previous 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

New Relationship

Step 3. Enter the label and name for the lookup field

Field Label

Field Name

Description

Help Text

Child Relationship Name

Sharing Setting

Selected the minimum access level required on the Master record to create, edit, or delete related Detail records.

Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.

Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.

Allow reparenting Child records can be reparented to other parent records after they are created

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

Lookup Filter

Optional, create a filter to limit the records available to users in the lookup field. [Tell me more!](#)

Step 3 of 6

Previous Next Cancel

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Laptop Booking) in the
2. search bar >> click on the object.
3. Now click on “Fields & Relationships” >> New
4. Select Data Type as a “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 left sidebar lists various object settings like Details, Page Layouts, Lightning Record Pages, etc. The main content area is titled 'Laptop Bookings' and shows the 'Fields & Relationships' section. A large list of field types is displayed with their descriptions. The 'Currency' type is selected, indicated by a blue circle next to it. Other types shown include Lookup Relationship, Master-Detail Relationship, External Lookup Relationship, Checkbox, Date, Date/Time, Email, Geolocation, Number, Percent, Phone, Picklist, Picklist (Multi-Select), Text, Text Area, Text Area (Long), and Text Area (Rich). Each type has a detailed description below it.

The screenshot shows the 'New Custom Field' creation wizard, Step 2 of 4. The left sidebar is identical to the previous screenshot. The main form is titled 'Step 2. Enter the details'. It contains fields for 'Field Label' (Amount), 'Length' (18), 'Decimal Places' (0), 'Field Name' (Amount), 'Description', 'Help Text', and 'Required' checkboxes. Below these are 'Auto add to custom report type' checkboxes for 'Always require a value in this field in order to save a record' and 'Add this field to existing custom report types that contain this entity'. At the bottom is a 'Default Value' section with a 'Show Formula Editor' button. A note at the bottom explains formula syntax for text and picklist values.

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:
7. Change the Field Label: Total No Of Laptops
8. Field Name :It's gets auto generated
9. Click on Next >> Next >> Save and new.

The screenshot shows the 'Laptop Bookings' object setup page. The left sidebar lists various configuration options like Details, Page Layouts, Lightning Record Pages, etc. The 'Fields & Relationships' tab is selected. A modal window titled 'Step 2. Choose the related object' is open, showing a dropdown menu where 'Total laptops' is selected. The top right of the modal shows 'Step 2 of 6'. Navigation buttons for 'Previous', 'Next', and 'Cancel' are visible at the bottom of the modal.

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 'Laptop Bookings' object setup page. The left sidebar lists various configuration options like Details, Page Layouts, Lightning Record Pages, etc. The 'Fields & Relationships' tab is selected. A table titled 'Fields & Relationships' displays the following data:

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
 - Fill the Above as following:
 - Field Label: Laptops delivered
 - Field Name :It's gets auto generated
5. Click on Next
6. Select the Laptop Bookings in the Summarized Object
7. Select the count Radio button in the select Roll-up Type
8. Click>>next >>next>>save.

The screenshot shows the 'New Custom Field' wizard in the Salesforce Setup. The left sidebar lists various object settings. The main screen is titled 'Step 1. Choose the field type'. It asks to specify the type of information the custom field will contain. Under 'Data Type', the 'Roll-Up Summary' option is selected. Other options shown include None Selected, Auto Number, Formula, Lookup Relationship, Master-Detail Relationship, External Lookup Relationship, Checkbox, and Currency. Each option has a detailed description below it. The 'Next' button is visible at the top right.

The screenshot shows the 'Step 2. Enter the details' screen. The 'Field Label' is set to 'Laptops delivered'. The 'Field Name' is 'Laptops_Delivered'. The 'Description' and 'Help Text' fields are empty. A checkbox 'Add this field to existing custom report types' is checked. The 'Next' button is visible at the top right.

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

- Page Header:** Includes a cloud icon, "Setup", "Home", "Object Manager", and a search bar labeled "Search Setup".
- Breadcrumb:** "SETUP > OBJECT MANAGER" followed by "Total Laptops".
- Left Sidebar:** A navigation menu under "Fields & Relationships" containing items like "Page Layouts", "Lightning Record Pages", "Buttons, Links, and Actions", etc.
- Main Content:**
 - Section:** "Total Laptops New Custom Field".
 - Step:** "Step 3. Define the summary calculation" (Step 3 of 5).
 - Form Fields:**
 - Select Object to Summarize:** Master Object is "Total Laptops" and Summarized Object is "Laptop Bookings".
 - Select Roll-Up Type:** COUNT (selected), SUM, MIN, MAX.
 - Filter Criteria:** All records should be included in the calculation.
 - Buttons:** "Previous", "Next", and "Cancel".

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

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

- Page Header:** Includes a cloud icon, "Setup", "Home", "Object Manager", and a search bar labeled "Search Setup".
- Breadcrumb:** "SETUP > OBJECT MANAGER" followed by "Laptop Bookings".
- Left Sidebar:** A navigation menu under "Fields & Relationships" containing items like "Page Layouts", "Lightning Record Pages", "Buttons, Links, and Actions", etc.
- Main Content:**
 - Section:** "Laptop Bookings New Custom Field".
 - Step:** "Step 1. Choose the field type" (Step 1 of 5).
 - Form Fields:**
 - Data Type:** "None Selected" is selected. A note says "Select one of the data types below."
 - Options:**
 - 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 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:** 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.
 - Buttons:** "Next", "Cancel".

The screenshot shows the 'Object Manager' section of the Salesforce Setup. A sidebar on the left lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main area is titled 'Laptop Bookings' and 'New Custom Field'. Step 2 of 5 is shown, where the 'Field Label' is set to 'Laptops Available' and the 'Field Name' is 'Laptops_Available'. The 'Formula Return Type' is selected as 'Number'. Below this, there's a formula editor with the expression '50 - Total_No_of_Laptops__r.Laptops_delivered__c' entered. A 'Quick Tips' panel on the right provides links to 'Getting Started' and 'Operators & Functions'.

This screenshot continues the process from the previous one. It shows 'Step 3 of 5' for entering the formula. The formula '50 - Total_No_of_Laptops__r.Laptops_delivered__c' is visible in the formula editor. The 'Simple Formula' tab is selected. To the right, there's a 'Quick Tips' panel with links to 'Getting Started' and 'Operators & Functions'. A sidebar on the left shows the 'Fields & Relationships' section of the Object Manager.

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.
- 3.Now click on “Fields & Relationships” >>New
- 4.Select Data Type as a “picklist” and Label: how many months
5. Picklist values are 1.2.3.4.5
6. Click and save it.

SETUP > OBJECT MANAGER
Laptop Bookings

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Object Access

Triggers

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

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

Currency
Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

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

Date/Time
Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.

Email
Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

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

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

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

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

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

Picklist (Multi-Select)
Allows users to select multiple values from a list you define.

Text
Allows users to enter any combination of letters and numbers.

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

Text Area (Long)
Allows users to enter up to 131,072 characters on separate lines.

Text Area (Rich)
Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

Text (Encrypted)
Allows users to enter any combination of letters and numbers and store them in encrypted form.

Time
Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50.600" are all valid times for this field.

URL
Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

Next Cancel

SETUP > OBJECT MANAGER
Laptop Bookings

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Object Access

Triggers

Step 2. Enter the details Step 2 of 4

Field Label: how many months

Values:
 Use global picklist value set
 Enter values, with each value separated by a new line

1
2
3
4
5

Display values alphabetically, not in the order entered
Use first value as default value
Restrict picklist to the values defined in the value set

Field Name: how_many_months

Description:

Help Text:

Required: Always require a value in this field in order to save a record

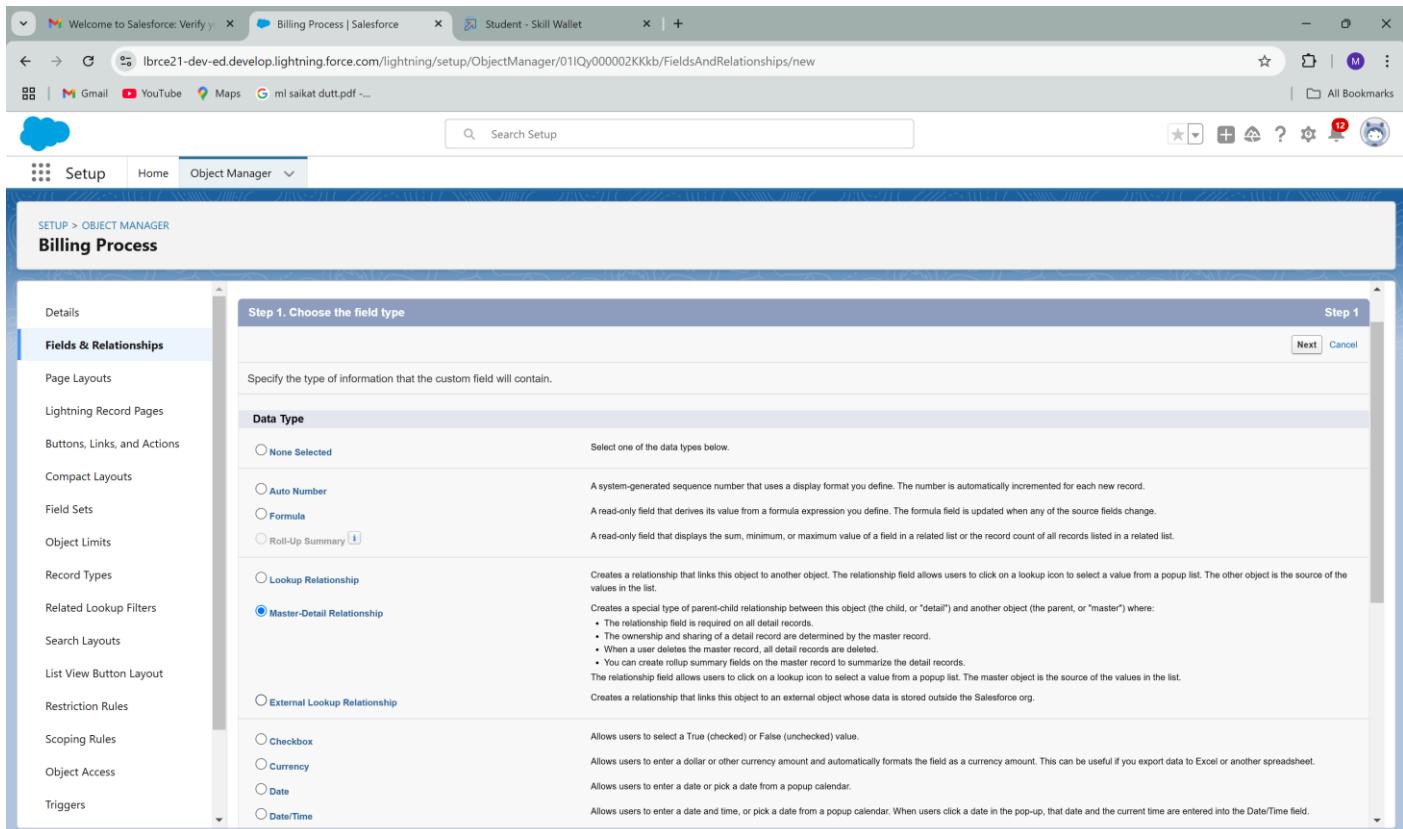
Auto add to custom report type: Add this field to existing custom report types that contain this entity

Previous Next Cancel

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 Salesforce Setup interface for the Billing Process object. The left sidebar is titled 'Fields & Relationships' and lists various options like Page Layouts, Lightning Record Pages, and Triggers. The main content area is titled 'Billing Process New Relationship' and is on 'Step 2 of 6'. It asks 'Select the other object to which this object is related' and has a dropdown set to 'Consumer'. Navigation buttons 'Previous', 'Next', and 'Cancel' are at the bottom right.

Creating the field in Total Laptops object

The screenshot shows the Salesforce Setup interface for the Billing Process object. The left sidebar is titled 'Fields & Relationships' and lists various options. The main content area is titled 'Billing Process New Custom Field' and is on 'Step 1 of 6'. It asks 'Specify the type of information that the custom field will contain' and shows a 'Data Type' section with several options: 'None Selected' (selected), 'Auto Number', 'Formula', 'Roll-Up Summary', 'Lookup Relationship' (selected), 'Master-Detail Relationship', 'External Lookup Relationship', 'Checkbox', and 'Currency'. Descriptions and notes are provided for each option. Navigation buttons 'Next' and 'Cancel' are at the bottom right.

Welcome to Salesforce: Verify | Billing Process | Salesforce | Student - Skill Wallet

lbrc21-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lQy000002KKkb/FieldsAndRelationships/new

Gmail YouTube Maps ml saikat dutt.pdf ~... All Bookmarks

Cloud Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Billing Process

Billing Process New Relationship

Step 2. Choose the related object

Select the other object to which this object is related.

Related To Laptop Bookings

Help for this Page Step 2 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

Welcome to Salesforce: Verify | Billing Process | Salesforce | Student - Skill Wallet

lbrc21-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lQy000002KKkb/FieldsAndRelationships/new

Gmail YouTube Maps ml saikat dutt.pdf ~... All Bookmarks

Cloud Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Billing Process

Billing Process New Relationship

Step 3. Enter the label and name for the lookup field

Field Label Laptop Booking

Field Name Laptop_Booking

Description

Help Text

Child Relationship Name Billing_Process

Required

What to do if the lookup record is deleted?

Always require a value in this field in order to save a record

Clear the value of this field. You can't choose this option if you make this field required.

Don't allow deletion of the lookup record that's part of a lookup relationship.

Add this field to existing custom report types that contain this entity

Auto add to custom report type

Lookup Filter

Optional, create a filter to limit the records available to users in the lookup field. [Tell me more!](#)

Show Filter Settings

Help for this Page Step 3 of 6 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

Welcome to Salesforce: Verify | Billing Process | Salesforce | Student - Skill Wallet

lbrc21-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lQy000002KKkb/FieldsAndRelationships/new

Gmail YouTube Maps ml saikat dutt.pdf All Bookmarks

Setup > Object Manager

Billing Process

Fields & Relationships

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

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)

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 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 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.

Welcome to Salesforce: Verify | Billing Process | Salesforce | Student - Skill Wallet

lbrc21-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lQy000002KKkb/FieldsAndRelationships/new

Gmail YouTube Maps ml saikat dutt.pdf All Bookmarks

Setup > Object Manager

Billing Process

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Object Access

Triggers

Step 2. Enter the details

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

Welcome to Salesforce: Verify y Billing Process | Salesforce Student - Skill Wallet

lbrc21-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lQy000002KKkb/FieldsAndRelationships/new

Gmail YouTube Maps ml saikat dutt.pdf ...

Setup Home Object Manager

SETUP > OBJECT MANAGER Billing Process

Step 1. Choose the field type

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.

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 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.

Master-Detail 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.

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.

Step 1

Next Cancel

Welcome to Salesforce: Verify y Billing Process | Salesforce Student - Skill Wallet

lbrc21-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lQy000002KKkb/FieldsAndRelationships/new

Gmail YouTube Maps ml saikat dutt.pdf ...

Setup Home Object Manager

SETUP > OBJECT MANAGER Billing Process

Step 2. Choose output type

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

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.

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

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

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

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

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

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

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

Field Name

Previous Next Cancel

Decimal Places Example: 999.00

Welcome to Salesforce: Verify | Billing Process | Salesforce | Student - Skill Wallet

lbrc21-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lQy000002KKb/FieldsAndRelationships/new

Gmail YouTube Maps ml saikat dutt.pdf

Setup Home Object Manager

SETUP > OBJECT MANAGER
Billing Process

Details

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules
- Object Access
- Triggers

Step 3. Enter formula Step 3 of 5

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 [More Examples...](#)

Simple Formula Advanced Formula

Insert Field Insert Operator Insert Selected Function

Amount (Currency) = Laptop_Booking__r.Amount__c

Functions

- ABS
- ACOS
- ADDMONTHS
- AND
- ASCII
- ASIN

Quick Tips

- Getting Started
- Operators & Functions

Previous Next Cancel

Welcome to Salesforce: Verify | Total Laptops | Salesforce | Student - Skill Wallet

lbrc21-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lQy000002KJer/FieldsAndRelationships/new

Gmail YouTube Maps ml saikat dutt.pdf

Setup Home Object Manager

SETUP > OBJECT MANAGER
Total Laptops

Details

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules
- Object Access
- Triggers

New Custom Field Step 1

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

Data Type

None Selected Select one of the data types below.

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

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

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

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

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

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

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

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

Currency Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

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

Help for this page

Next Cancel

Welcome to Salesforce: Verify

Total Laptops | Salesforce

lbrc21-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01Qy000002KJef/FieldsAndRelationships/new

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Total Laptops

Details

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules
- Object Access
- Triggers

Step 2. Choose output type Step 2 of 5

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

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

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

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

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

Options Decimal Places Example: 999

Welcome to Salesforce: Verify

Total Laptops | Salesforce

lbrc21-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01Qy000002KJef/FieldsAndRelationships/new

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Total Laptops

Details

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules
- Object Access
- Triggers

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.

Example: `Fahrenheit = 1.8 * Celsius__c + 32` [More Examples...](#)

Simple Formula Advanced Formula

Insert Field Insert Operator

Laptops Available (Number) =
`50 - Laptops_delivered__c`

Functions

Quick Tips

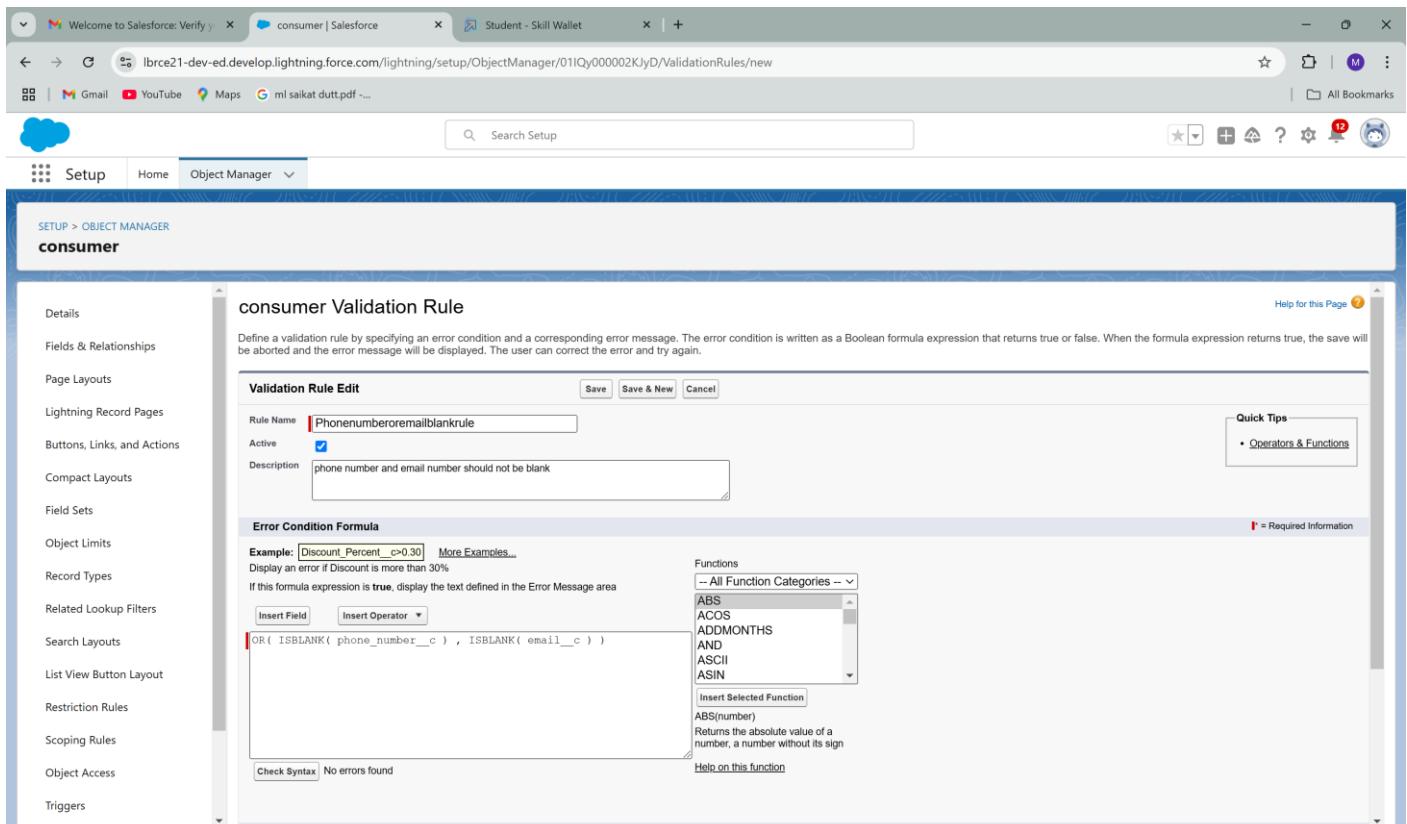
- Getting Started
- Operators & Functions

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 “Phonenumbereroremailblankrule”.
4. Enter the description as “phone number and email number should not be blank”.
5. Enter the formula as “OR(ISBLANK(phone_number_c), ISBLANK(email_c))” and check the syntax.



Owner Profile

To create a new profile:

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

Welcome to Salesforce: Verify y Profiles | Salesforce Student - Skill Wallet

lbrc21-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F__ui%2Fperms%2Fui%2Fprofile%2FProfileClone%2Fe%3FretURL%3D%252F00e%253Fsetupid%253DEnh...

Gmail YouTube Maps ml saikat dutt.pdf ~...

All Bookmarks

Cloud icon

Setup Home Object Manager

Search Setup

Q profile

Users Profiles

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

SETUP Profiles

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile: Standard User

User License: Salesforce

Profile Name: Owner

Save Cancel

Help for this Page

Welcome to Salesforce: Verify y Profiles | Salesforce Student - Skill Wallet

lbrc21-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00eQy000009ZkXR%2Fe%3FretURL%3D%252F00eQy000009ZkXR%253Fsetupid%253DEnhancedProfiles...

Gmail YouTube Maps ml saikat dutt.pdf ~...

All Bookmarks

Cloud icon

Setup Home Object Manager

Search Setup

Q profile

Users Profiles

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

SETUP Profiles

	Finance Balance Snapshots	Finance Transactions	Fulfillment Orders	Gateway Provider Payment Method Types	Guest User Anomaly Event Stores	Ideas	Images	Incidents	Individuals	Inventory Reservations	User External Credentials	Waitlists	Web Cart Documents	Web Store Inventory Sources	Work Orders	Work Plans	Work Plan Templates	Work Step Templates	Work Types	Work Type Groups
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Custom Object Permissions

	Basic Access					Data Administration						
	Read	Create	Edit	Delete	View All <small>i</small>	Modify All <small>i</small>	Read	Create	Edit	Delete	View All <small>i</small>	Modify All <small>i</small>
Billing Process	<input checked="" type="checkbox"/>											
consumer	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

Agent Profile

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

The screenshot shows the Salesforce Setup interface under the Profiles section. A modal window titled 'Clone Profile' is open, prompting the user to select an existing profile to clone from. The 'Existing Profile' dropdown is set to 'Standard Platform User'. The 'User License' is listed as 'Salesforce Platform'. The 'Profile Name' field contains 'Agent'. At the bottom of the modal are 'Save' and 'Cancel' buttons.

The screenshot shows the Salesforce Setup interface under the Profiles section, specifically the 'Edit Profile' screen for the 'Agent' profile. The 'Custom Object Permissions' section is visible, showing checkboxes for various objects like Contacts, Billing Process, consumer, Laptop Bookings, and Total Laptops across different levels of access (Read, Create, Edit, Delete, View All, Modify All). Below this, the 'Session Settings' section includes fields for 'Session Times Out After' (set to '2 hours of inactivity') and 'Session Security Level Required at Login' (set to 'None'). The 'Password Policies' section at the bottom contains various configuration options for password expiration and complexity.

Creating owner Role

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.

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

Your Organization's Role Hierarchy

Collapse All Expand All

- LBRC
 - CEO
 - CFO
 - COO
 - SVP_Customer Service & Support
 - Customer Support, International
 - Customer Support, North America
 - Installation & Repair Services
 - SVP_Human Resources
 - SVP_Sales & Marketing
 - VP_International Sales
 - VP_Marketing
 - Marketing Team

Role Edit

New Role

Role Edit

Label

Role Name [i](#)

This role reports to [o](#)

Role Name as displayed on reports

Save Save & New Cancel

Welcome to Salesforce: Verify | Roles | Salesforce | Student - Skill Wallet

lbrc21-dev-ed.develop.lightning.force.com/lightning/setup/Roles/page?address=%2Fui%2Fsetup%2Fuser%2FRoleViewPage%3Fsetupid%3DRoles

Gmail YouTube Maps ml saikat dutt.pdf ... All Bookmarks

Setup Home Object Manager

roles

Users Roles Feature Settings Sales Service Case Teams

Contact Roles on Contracts Contact Roles on Opportunities Case Team Roles Contact Roles on Cases

Did you find what you're looking for? Try using Global Search.

SETUP Roles

Your Organization's Role Hierarchy

LBRC E

- LBRC E
 - CEO Edit | Del | Assign
 - Add Role
 - CFO Edit | Del | Assign
 - Add Role
 - COO Edit | Del | Assign
 - Add Role
 - owner Edit | Del | Assign
 - Add Role
- SVP, Customer Service & Support Edit | Del | Assign
- Add Role
- Customer Support, International Edit | Del | Assign
- Add Role
- Customer Support, North America Edit | Del | Assign
- Add Role
- Installation & Repair Services Edit | Del | Assign
- Add Role
- SVP, Human Resources Edit | Del | Assign
- Add Role
- SVP, Sales & Marketing Edit | Del | Assign
- Add Role
- VP, International Sales Edit | Del | Assign
- Add Role
- VP, Marketing Edit | Del | Assign
- Add Role
- Marketing Team Edit | Del | Assign
- Add Role
- VP, North American Sales Edit | Del | Assign

Show in tree view

Welcome to Salesforce: Verify | Roles | Salesforce | Student - Skill Wallet

lbrc21-dev-ed.develop.lightning.force.com/lightning/setup/Roles/page?address=%2F00E%2Fe%3Fparent%3D00EQy000008EVpq%26setupid%3Droles%26retURL%3D%252Fui%252Fsetup%252Fuser%2...

Gmail YouTube Maps ml saikat dutt.pdf ... All Bookmarks

Setup Home Object Manager

roles

Users Roles Feature Settings Sales Service Case Teams

Contact Roles on Contracts Contact Roles on Opportunities Case Team Roles Contact Roles on Cases

Did you find what you're looking for? Try using Global Search.

SETUP Roles

New Role

Help for this Page

Role Edit

Label Agent

Role Name Agent

This role reports to owner

Role Name as displayed on reports

Save Save & New Cancel

Create User

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

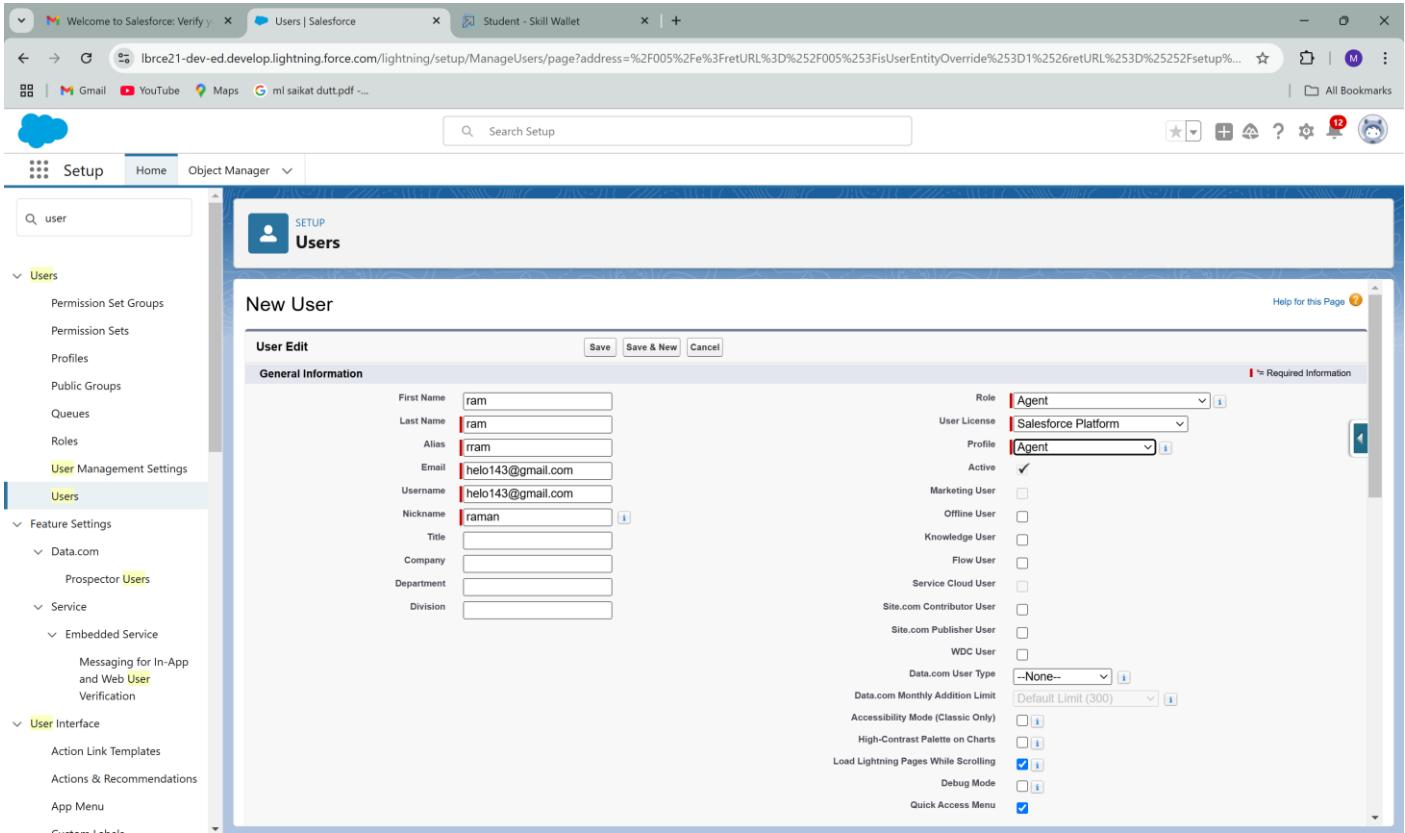
Activity 2: creating another users

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

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected in the sidebar. The main screen displays the 'User Edit' form for a new user. The 'General Information' section contains the following field values:

Field	Value
First Name	vicky
Last Name	y
Alias	Vicky
Email	rajumullangi5@gmail.com
Username	rajumullangi5@gmail.com
Nickname	User173339737482299603
Title	
Company	
Department	
Division	

The 'Role' dropdown is set to 'owner'. The 'User License' dropdown is set to 'Salesforce'. The 'Profile' dropdown is set to 'Owner'. The 'Active' checkbox is checked. On the right side of the form, there are several optional checkboxes and dropdowns, many of which are currently empty or set to their default values.



Create a Flow on dell laptop

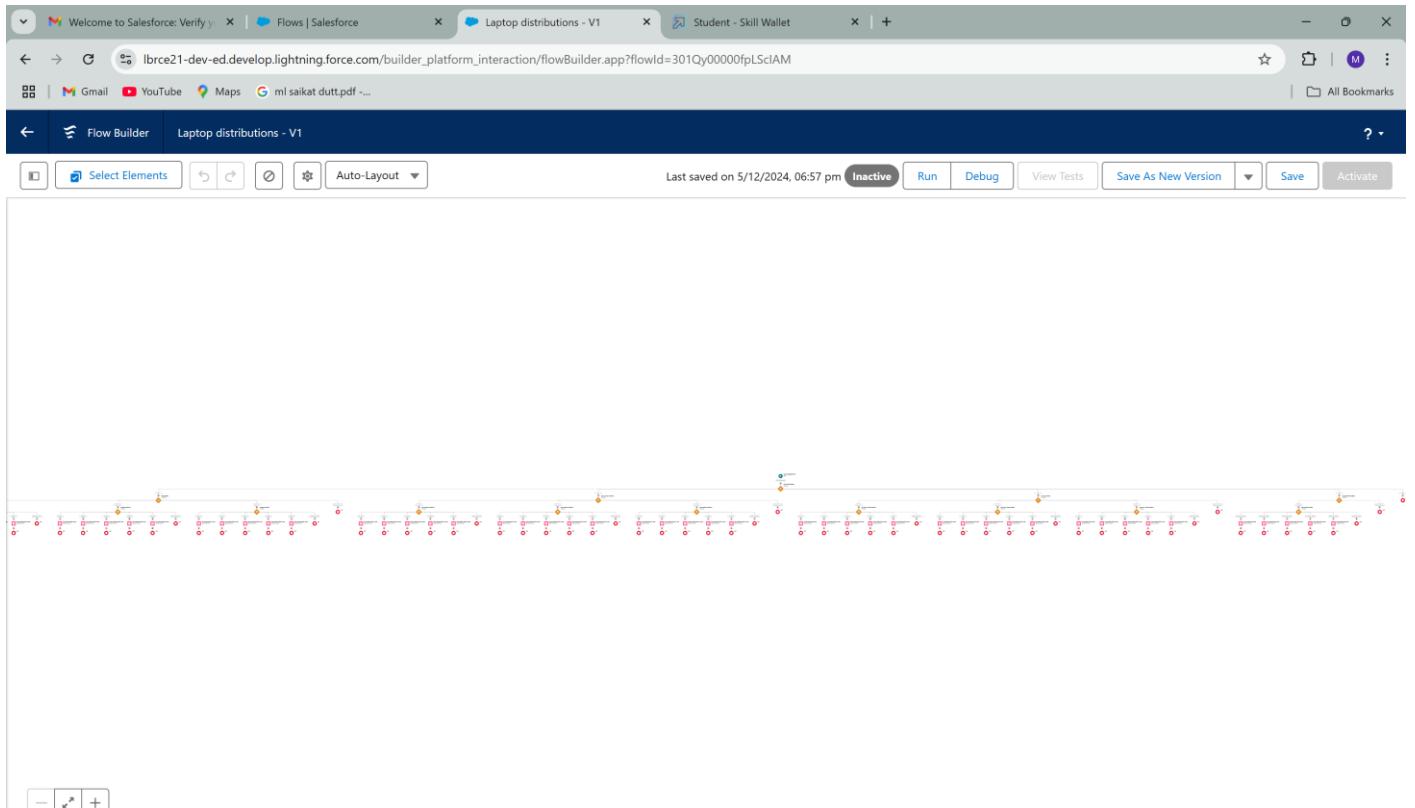
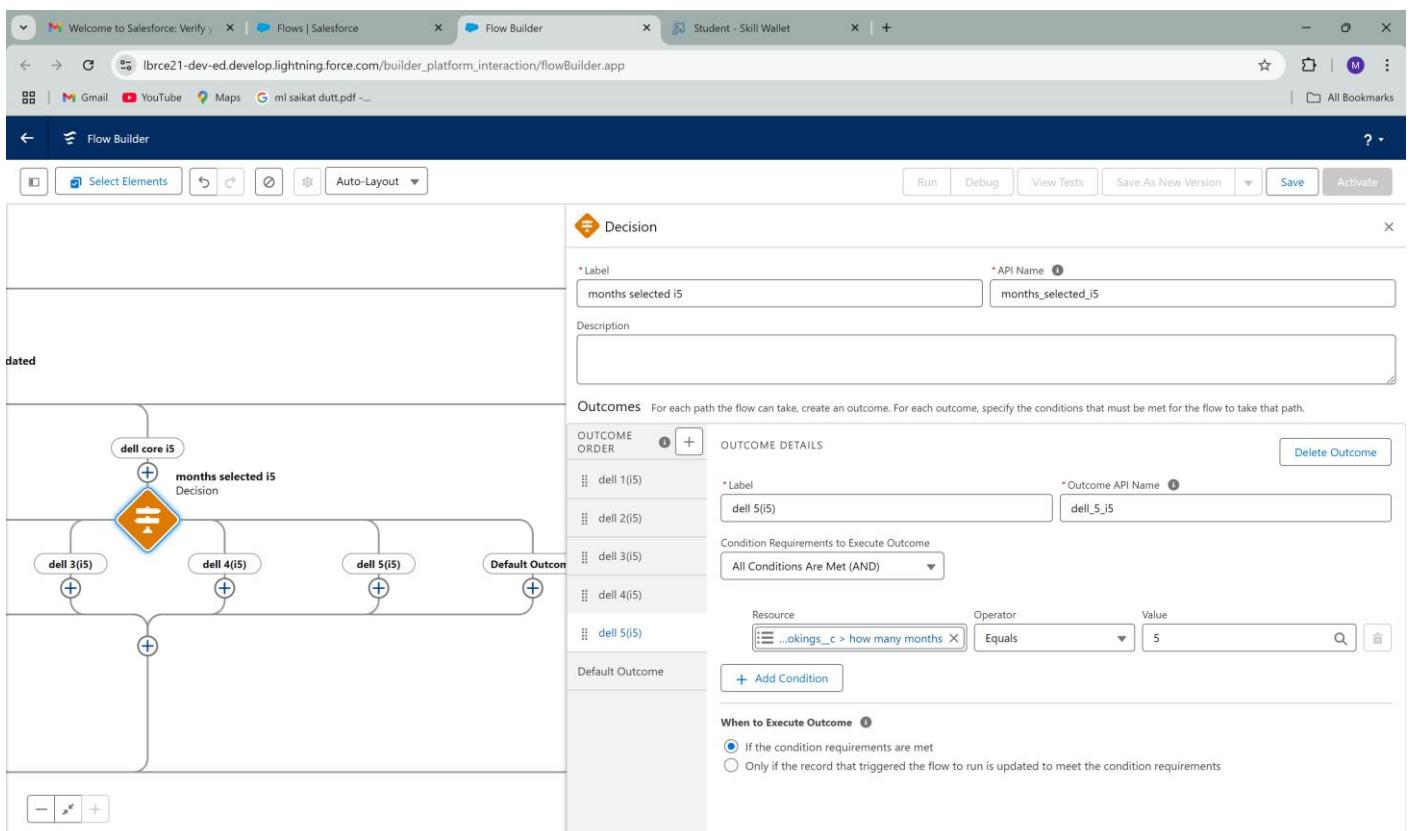
Activity -

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.
 1. Resource: Select Record.core type.

2. Operator: Select Equals.
 3. Value: Select core i5.
 4. Then again click the symbol '+' outcome details
15. Enter the Outcome Details Label: dell core i7 , Outcome API name: Gets Automatically Generated.
1. Resource: Select Record.core type.
 2. Operator: Select Equals.
 3. Value: Select core i7.
16. Click done.

The screenshot shows the Salesforce Flow Builder interface. On the left, a flow diagram titled "Start Record-Triggered Flow" is displayed. It starts with a "Start" element, followed by a "Record-Triggered Flow" element set to trigger on "A record is created or updated" for the object "Laptop Bookings". This leads to an "End" element. On the right, a configuration sidebar is open for the "Configure Start" step. It shows the "Select Object" section with "Laptop Bookings" selected. The "Configure Trigger" section has "A record is created or updated" selected. The "Set Entry Conditions" section indicates "None". The "Optimize the Flow for" section has "Actions and Related Records" selected.

The screenshot shows the Salesforce Flow Builder interface. A flow diagram is displayed on the left. It starts with a "Record-Triggered Flow" element, followed by a "Run Immediately" element, and then an "Add Element" element. Inside the "Add Element" element, there is a "Decision" element with a condition "decision". Below it is a "Refresh Decision Table" element. The flow ends with an "End" element. On the right, a configuration sidebar is open for the "Add Element" step. It shows the "Decision" element selected. The "Condition Requirements" dropdown is set to "None". The "Optimize the Flow for" section has "Actions and Related Records" selected.



The screenshot shows a Salesforce Lightning Report titled "Laptop Rentals". The report displays 8 total records for consumer: consumer_name. The modal window "Edit Subscription" is open, allowing configuration of the subscription settings. The "Frequency" tab is selected, showing options for Daily, Weekly, and Monthly. The "Time" is set to 8:00 am. An "Attachment" button is available. The "Recipients" section shows "Raju Mullangi" selected. The "Run Report As" section shows "Another Person" selected. The "Conditions" section is optional. At the bottom of the modal are "Cancel" and "Save" buttons.

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:

The screenshot shows a Gmail inbox with 2,988 messages. A specific email from 'Raju Mullangi' is selected, which has been flagged as spam. The subject of the email is 'Welcome to our company'. The message body contains a welcome message and some technical details: 'Laptop Amount = \$200.0', 'core type = core i7', and 'Laptop type = Acer'. Below the message are standard reply and forward buttons.

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 'Reports' section of the 'LAPTOPRENTALS' application. The top navigation bar includes links for 'Total Laptops', 'consumers', 'Laptop Bookings', 'Billing Process', and 'Reports'. The left sidebar lists categories like 'Reports', 'All Reports', 'Recent', 'Created by Me', 'Private Reports', 'Public Reports', and 'All Reports'. The main content area displays a table of reports. One report is visible: 'Sample Flow Report: Screen Flows', which is a 'Public Report' created by 'Automated Process' on '11/9/2023, 11:01 am'. The table columns include 'Report Name', 'Description', 'Folder', 'Created By', 'Created On', and 'Subscribed'.

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.

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.

	Range	Bucket
<input type="button" value="Add >"/>	<= 900	basic
<input type="button" value="Add >"/>	> 900 to 1500	intermediate
<input type="button" value="Add >"/>	> 1,500 to 10000	high
	> 10,000	very high

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.

REPORT ▾

Laptop Analytics / Total Laptops with Laptop Bookings and Consumer

Fields >

Outline Filters 1

Groups

Add group...

Types of Versions Types of Versions

GROUP ROWS

GROUP COLUMNS

Columns

Add column...

Laptop Bookings: Laptop Bookings

Consumer: consumer Name

Amount

Laptops Available

Previewing a limited number of records. Run the report to see everything.

Laptop Bookings: Laptop Bookings Consumer: consumer Name Amount Laptops Available Total Laptops: Total Laptops

Types of Versions	Laptop Bookings: Laptop Bookings	Consumer: consumer Name	Amount	Laptops Available	Total Laptops: Total Laptops
Basic (1)	Dell i3	Shruthi	₹1,000	48	Dell core i3 50
Subtotal			₹1,000	48	
Intermediate (1)	Acer	Swetha	₹1,500	46	50
Subtotal			₹1,500	46	
High (4)	Acer	Swetha	₹4,800	46	50
	Acer	Swetha	₹3,800	46	50
	Acer	Swetha	₹3,800	46	50
	Dell i3 Booking	Shruthi	₹5,000	48	Dell core i3 50
Subtotal			₹17,400	94	
Total (6)			₹19,900	94	

Row Counts Detail Rows Subtotals Grand Total

Update Preview Automatically

Conditional Formatting

Click on Save & run it.

REPORT: Total Laptops with Laptop Bookings and Consumer

Laptop Analytics

Total Records: 6 Total Amount: ₹19,900 Total Laptops Available: 94

Enable Field Editing Add Chart Edit

Fields >

Groups

Subtotals

Columns

Subtotals

Laptop Bookings: Laptop Bookings Consumer: consumer Name Amount Laptops Available Total Laptops: Total Laptops

Types of Versions	Laptop Bookings: Laptop Bookings	Consumer: consumer Name	Amount	Laptops Available	Total Laptops: Total Laptops
Basic (1)	Dell i3	Shruthi	₹1,000	48	Dell core i3 50
Subtotal			₹1,000	48	
Intermediate (1)	Acer	Swetha	₹1,500	46	50
Subtotal			₹1,500	46	
High (4)	Acer	Swetha	₹4,800	46	50
	Acer	Swetha	₹3,800	46	50
	Acer	Swetha	₹3,800	46	50
	Dell i3 Booking	Shruthi	₹5,000	48	Dell core i3 50
Subtotal			₹17,400	94	
Total (6)			₹19,900	94	

Row Counts Detail Rows Subtotals Grand Total

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.

Report: Total Laptops with Laptop Bookings and Consumer Laptop Analytics

Total Records	Total Amount	Total Laptops Available			
6	₹19,900	94			
<input type="checkbox"/> Types of Versions + <input type="button" value="Laptop Bookings: Laptop Bookings"/> <input type="button" value="Consumer: consumer Name"/> <input type="button" value="Amount"/> <input type="button" value="Laptops Available"/> <input type="button" value="Total Laptops: Total Laptops"/>					
<input type="checkbox"/> Basic (1) Dell i3 Shruthi ₹1,000 48 Dell core i3 50 Subtotal <input type="checkbox"/> Intermediate (1) Acer Swetha ₹1,500 46 50 Subtotal <input type="checkbox"/> High (4) Acer Swetha ₹4,800 46 50 Acer Swetha ₹3,800 46 50 Acer Swetha ₹3,800 46 50 Dell i3 Booking Shruthi ₹5,000 48 Dell core i3 50 Subtotal Total (6) ₹19,900 94					

Row Counts

Edit Subscription

Settings

Frequency

-
-
-

Time

8:00 am

Attachment

Recipients

Send email to

Me

Run Report As

Me

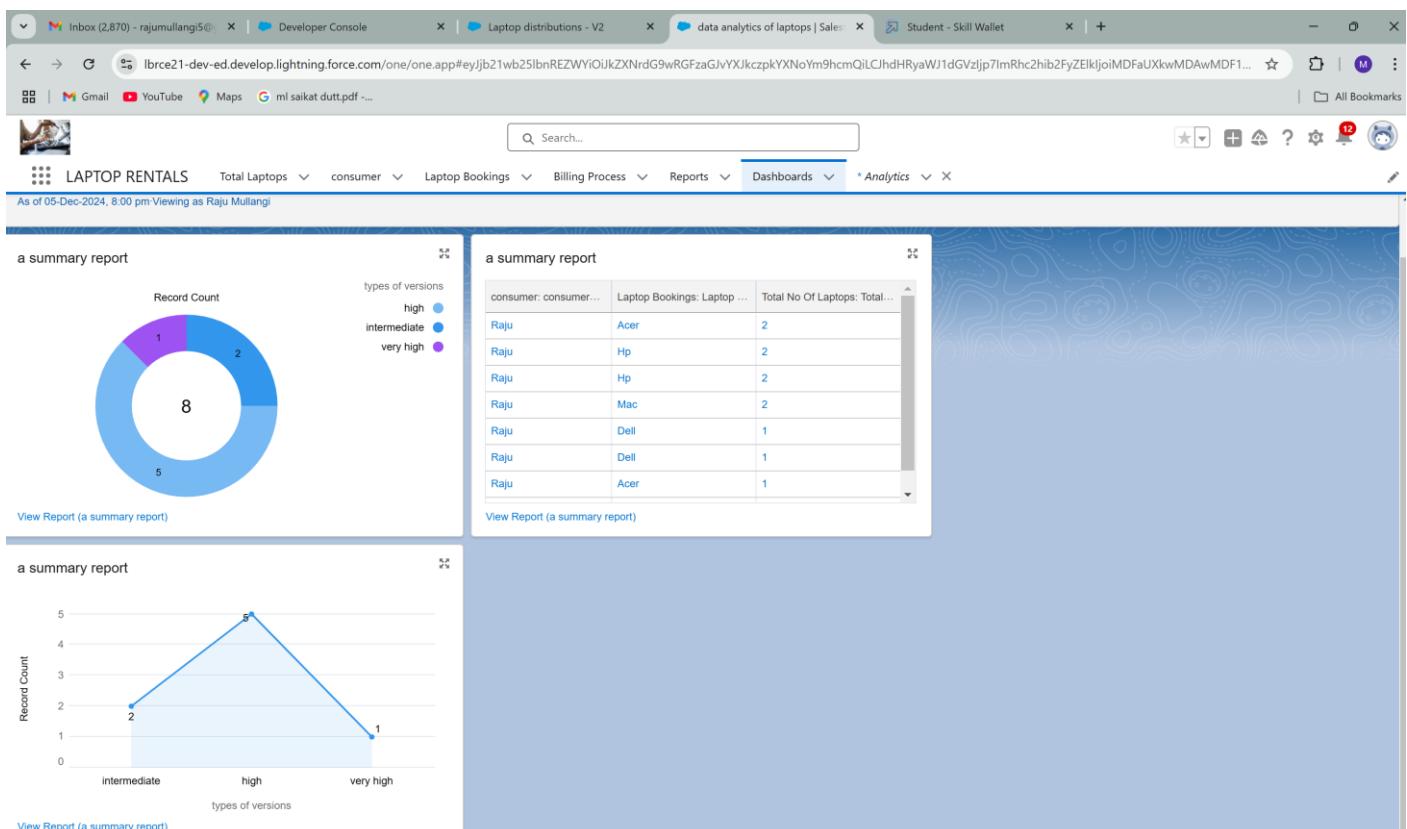
Another Person

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