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

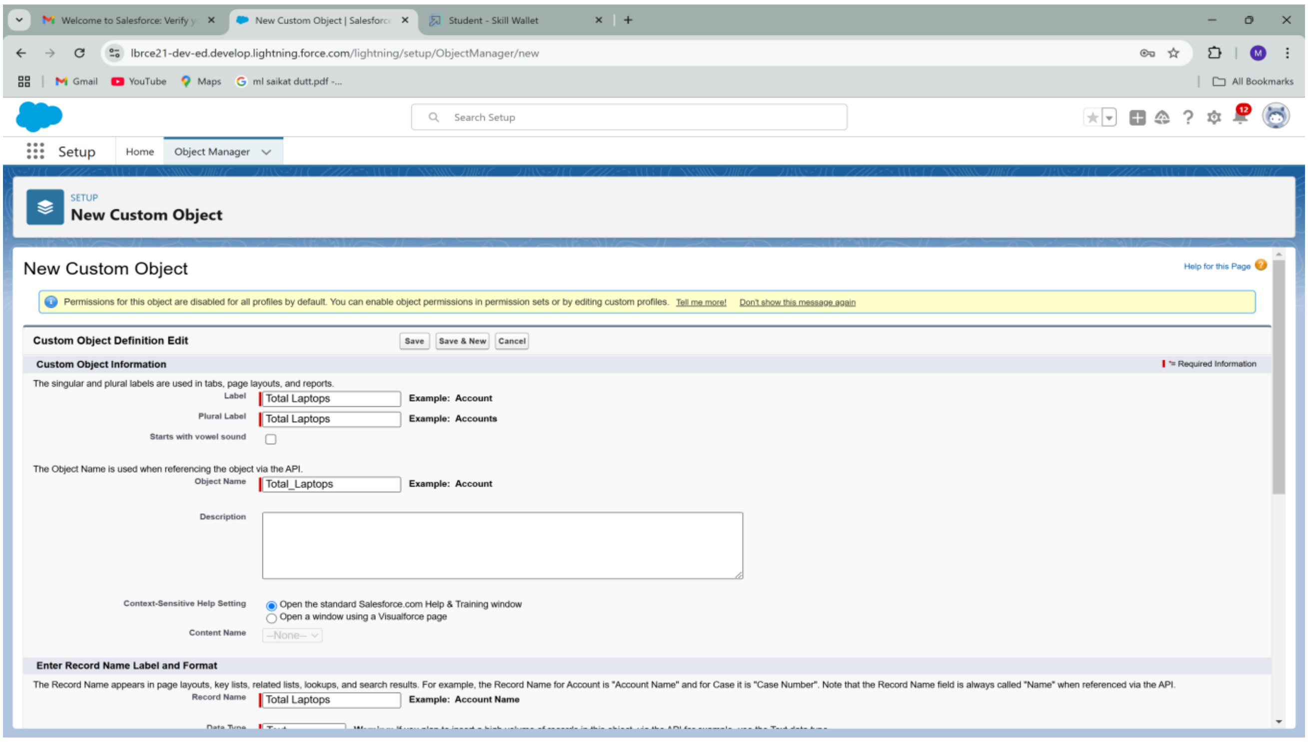
Enter Record Name Label and Format

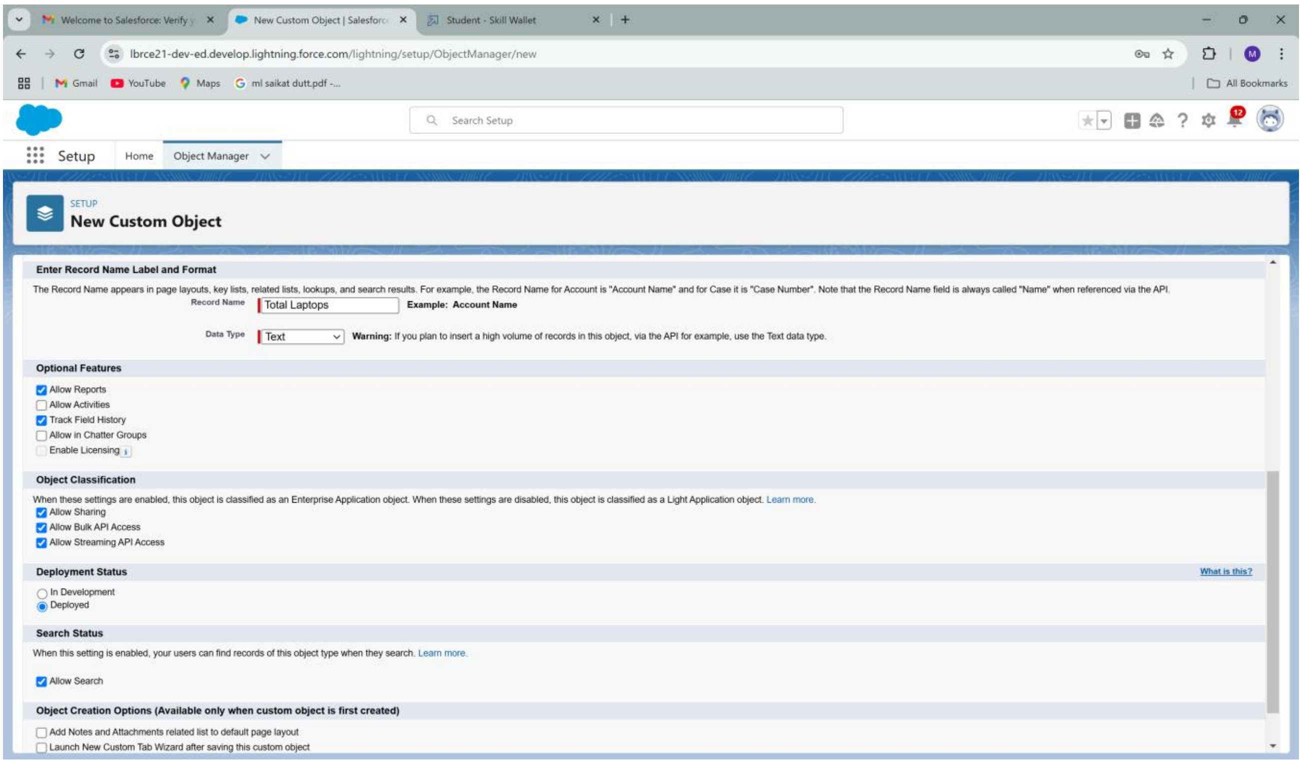
Record Name >>Total Laptops

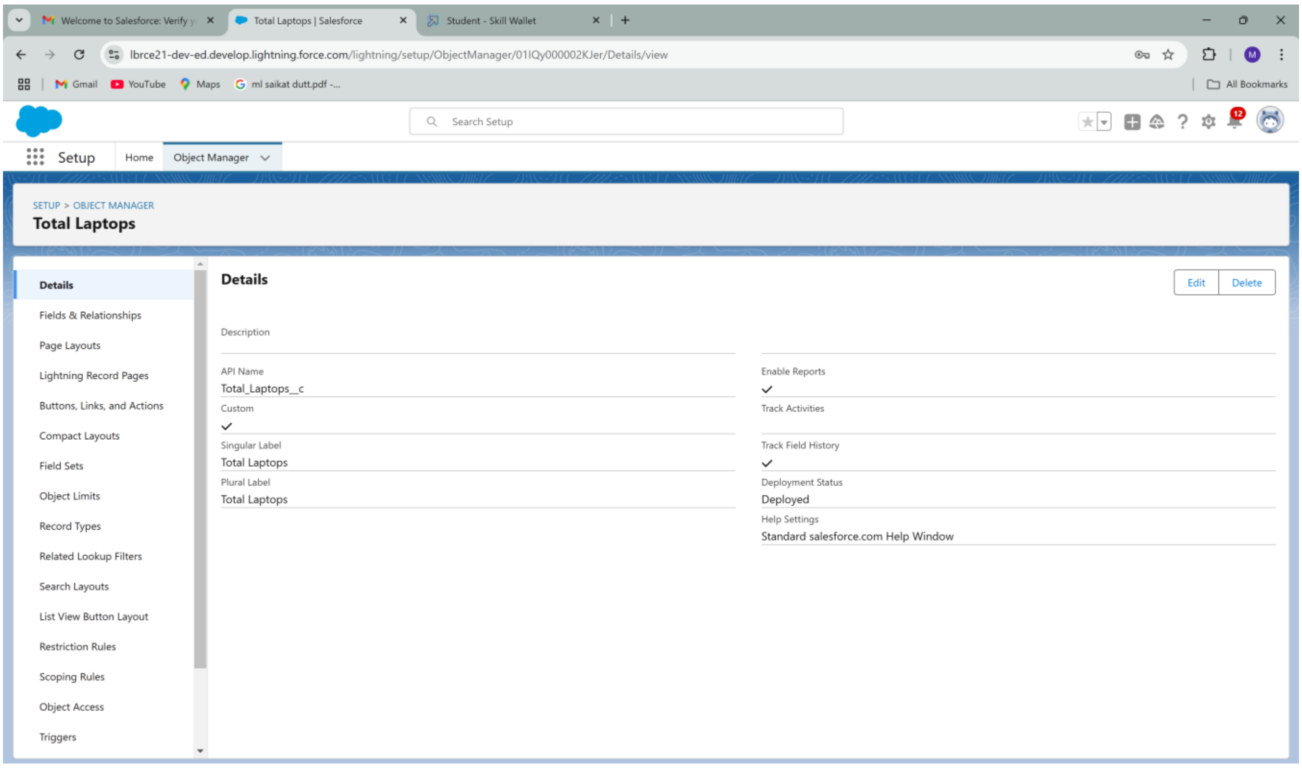
Data Type >> Text

Click on Allow reports, Allow search and Track Field History,

Allow search >> Save.







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

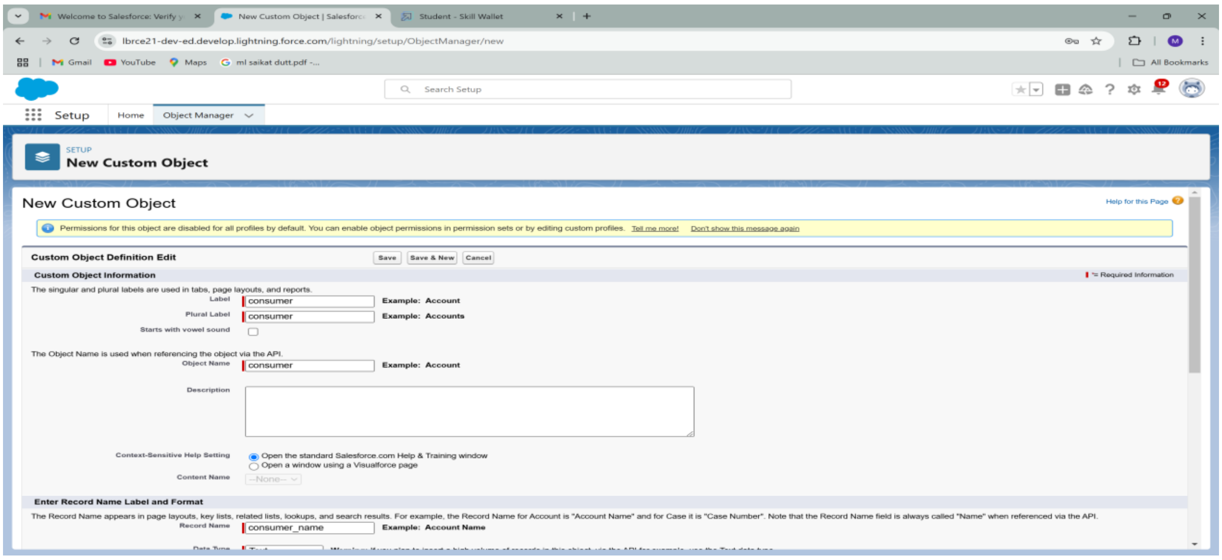
2) Plural label name >> consumer

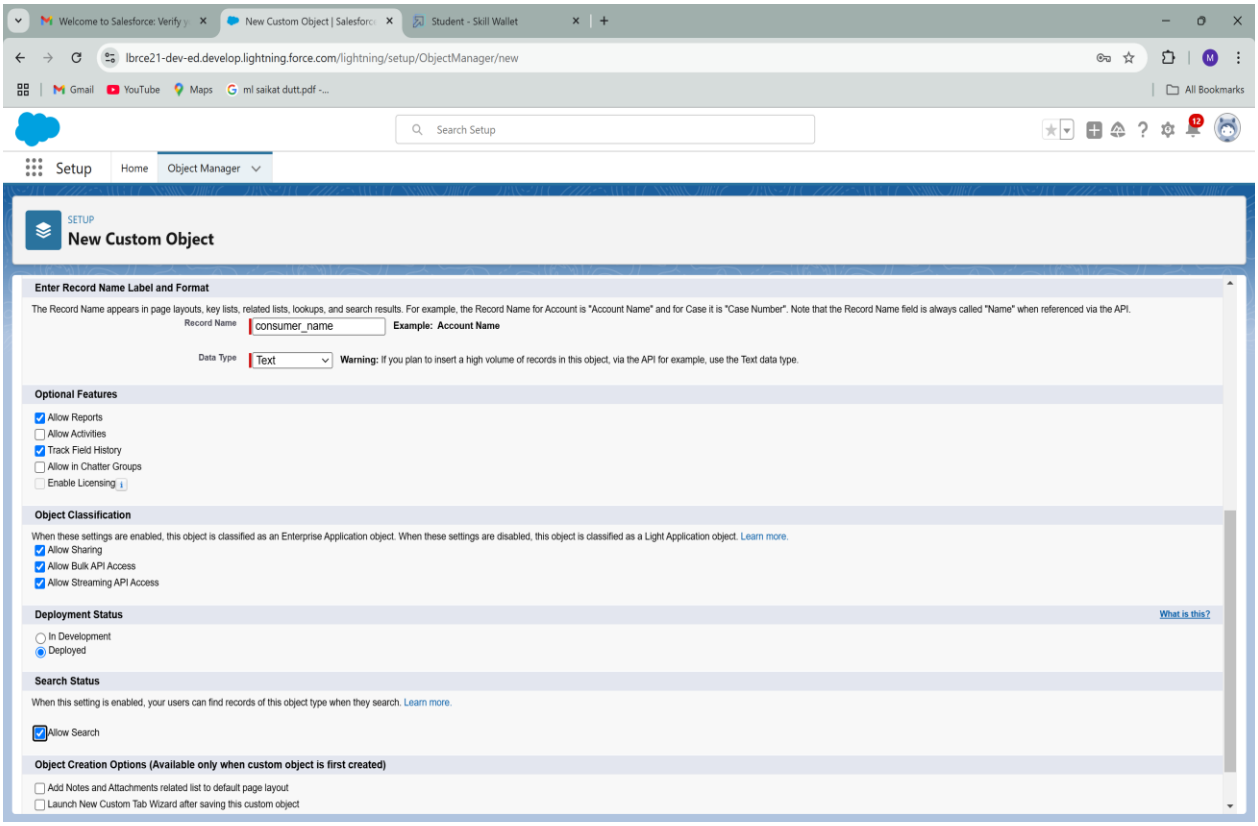
3) Enter Record Name Label and Format

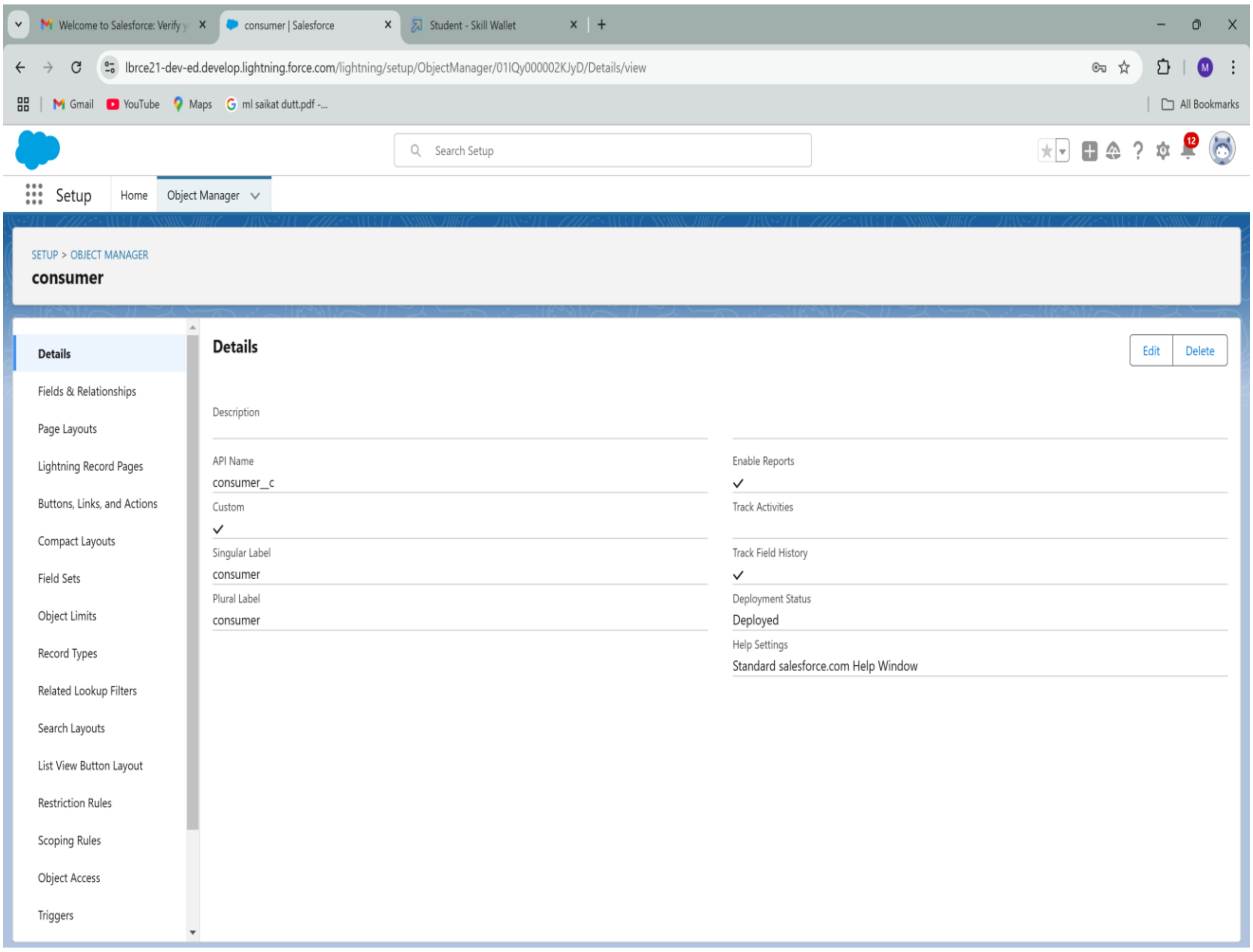
Record Name >> consumer_name

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
lbrce21-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new
Gmail
YouTube
Maps
ml saikat dutt.pdf -...
All Bookmarks
Search Setup
Setup
Home
Object Manager
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
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
What is this?
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
lbrce21-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IQy000002KJyD/Details/view
Gmail
YouTube
Maps
ml saikat dutt.pdf -...
All Bookmarks
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
consumer
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Triggers
Details
Edit
Delete
Description
API Name
consumer__c
Custom
Singular Label
consumer
Plural Label
consumer
Enable Reports
Track Activities
Track Field History
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window

3) Create Laptop Bookings Object

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

1) Enter the label name >> Laptop Bookings

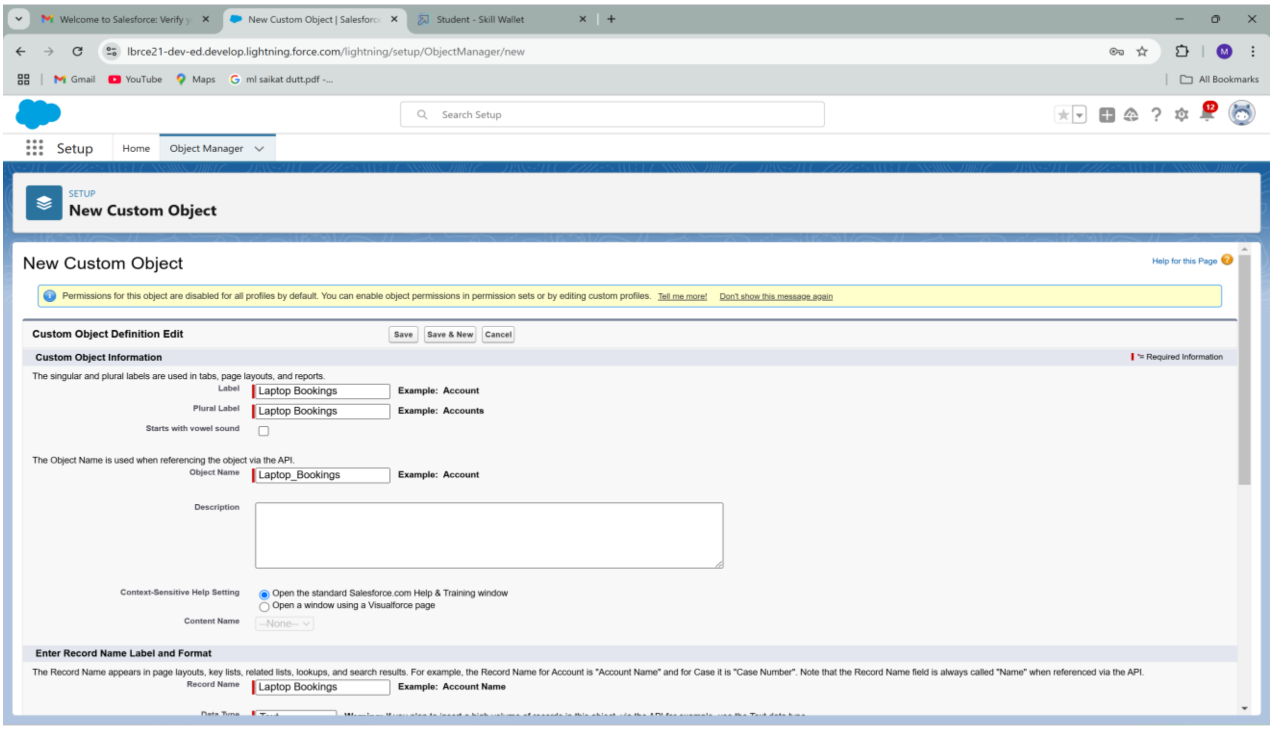
2) Plural label name >> Laptop Bookings

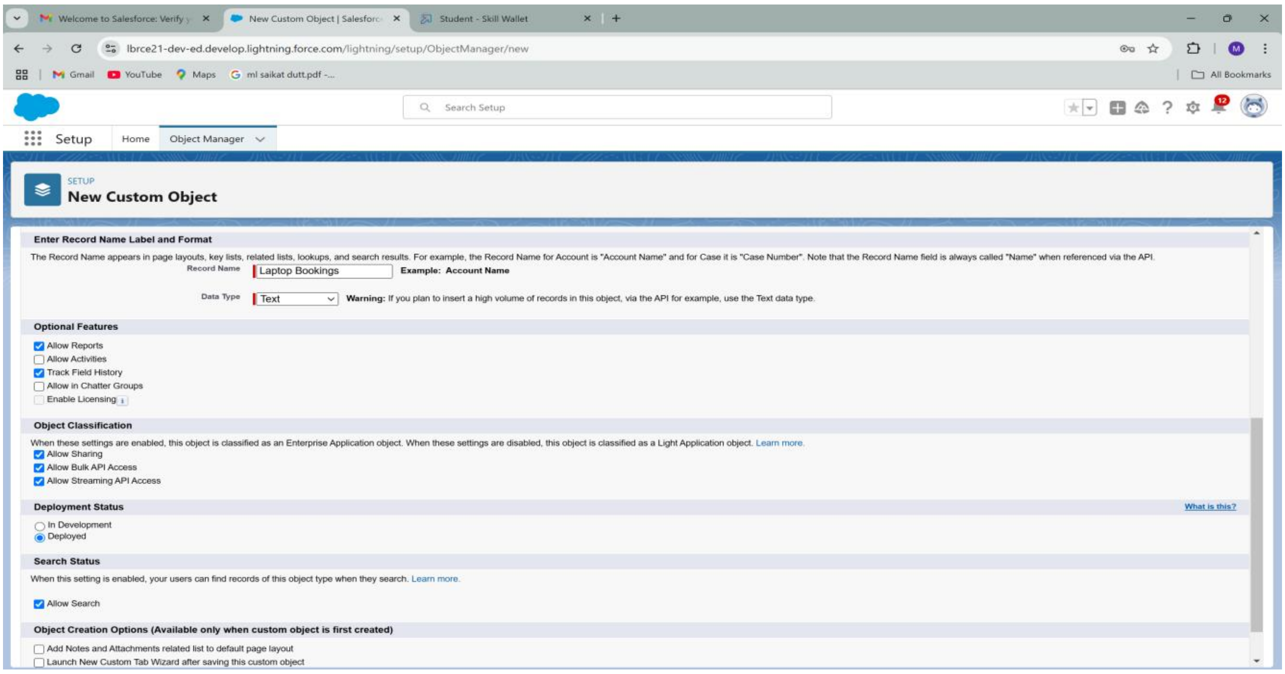
3) Enter Record Name Label and Format

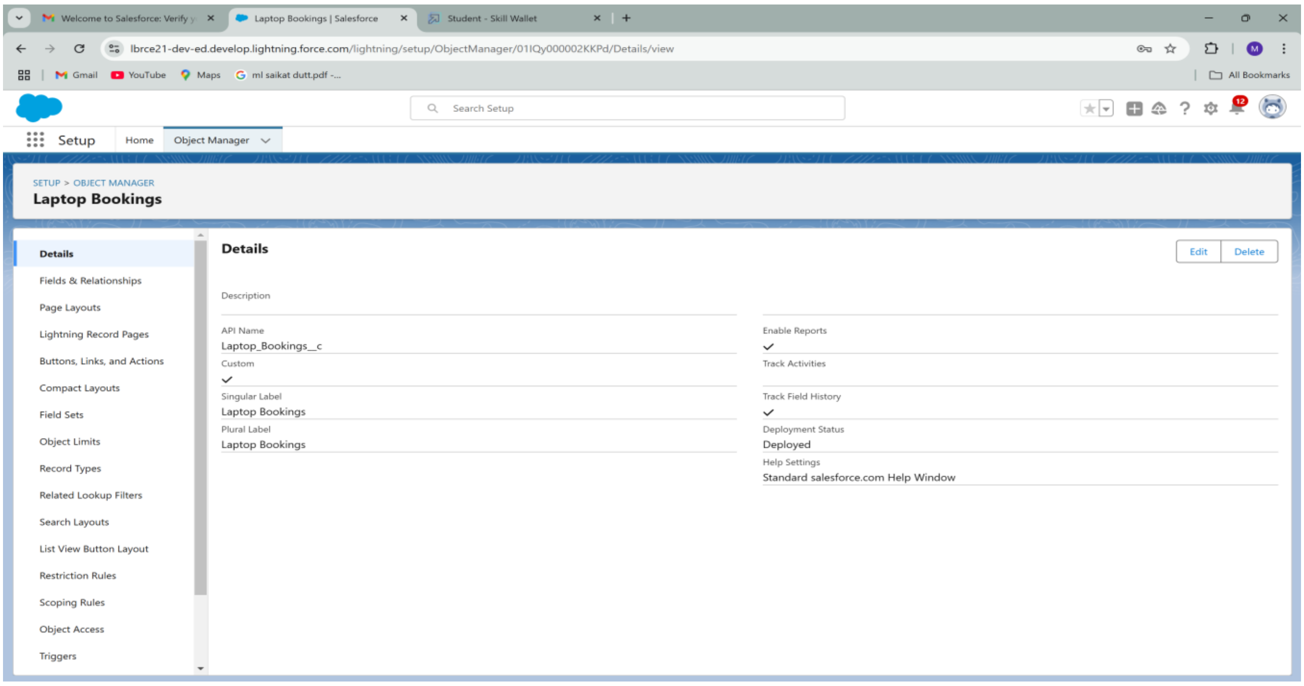
Record Name >> Laptop Bookings

Data Type >> Name

Click on Allow reports,Allow search and Track Field History, Allow search >> Save.







4) Create Billing Process Object

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

1) Enter the label name >> Billing Process

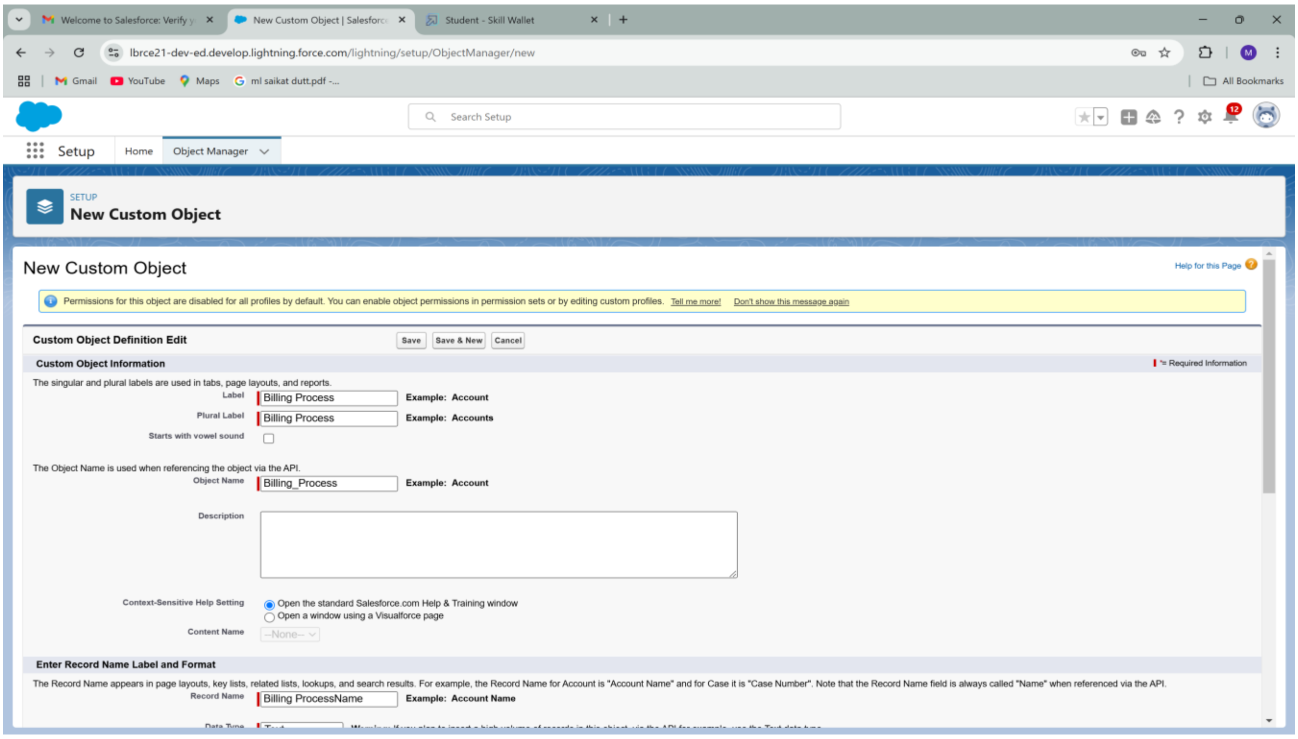
2) Plural label name >> Billing Process

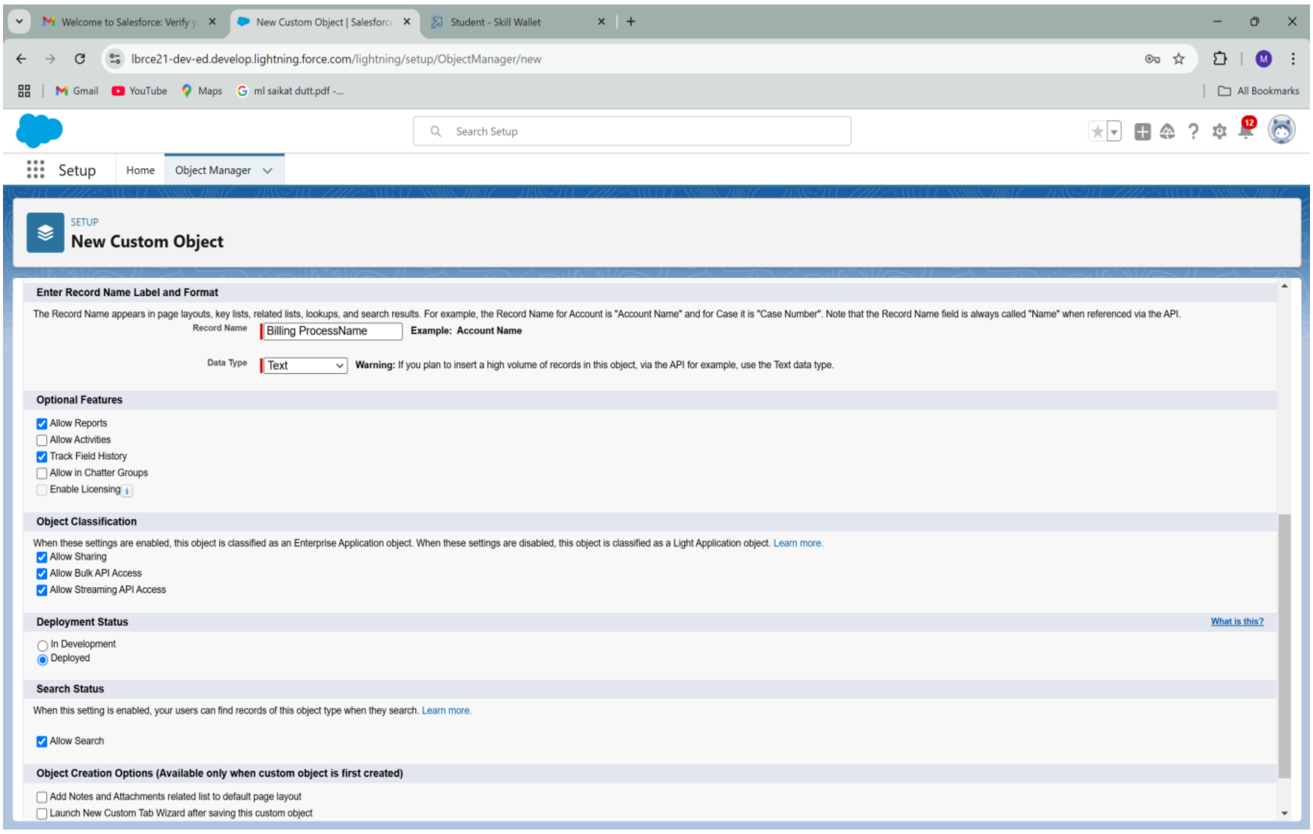
3) Enter Record Name Label and Format

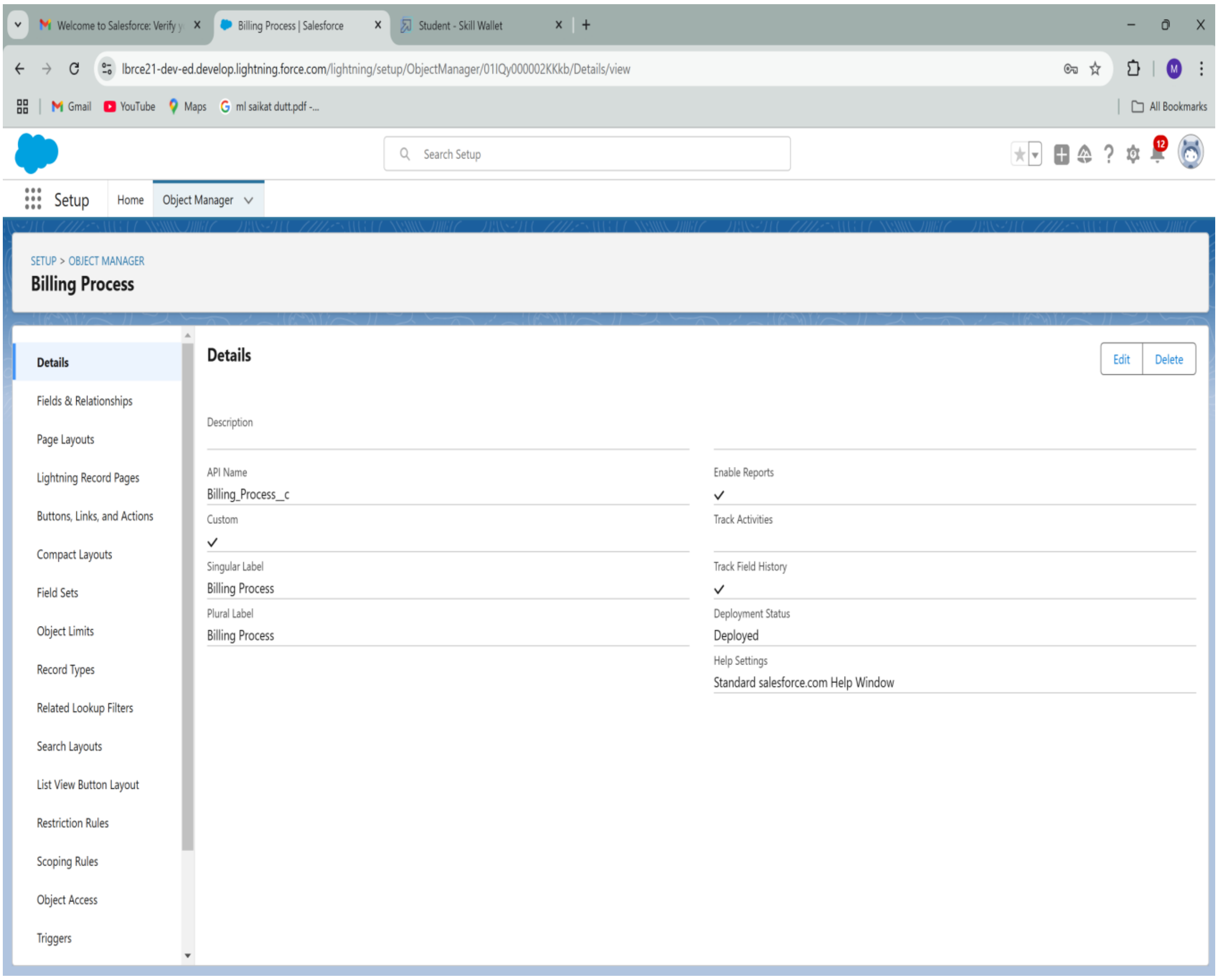
Record Name >> Billing ProcessName

Data Type >> Name

Click on Allow reports,Allow search and Track Field History, Allow search >> Save.




Welcome to Salesforce: Verify y
New Custom Object | Salesforce
Student - Skill Wallet
lbrce21-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new
Gmail
YouTube
Maps
ml saikat dutt.pdf -...
All Bookmarks
Search Setup
Setup
Home
Object Manager
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
What is this?
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

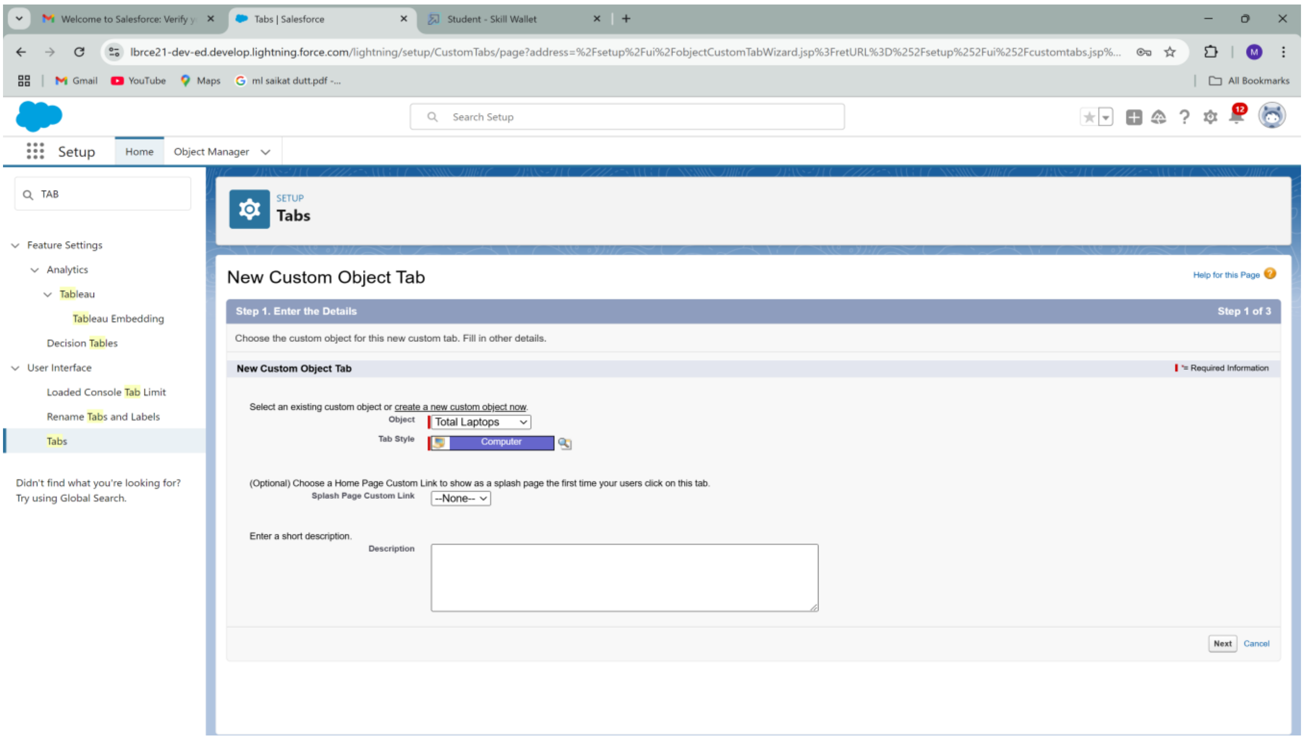

Welcome to Salesforce: Verify y
Billing Process | Salesforce
Student - Skill Wallet
lbrce21-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IQy000002KKkb/Details/view
Gmail
YouTube
Maps
ml saikat dutt.pdf -...
All Bookmarks
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Billing Process
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Triggers
Details
Edit
Delete
Description
API Name
Billing_Process__c
Custom
Singular Label
Billing Process
Plural Label
Billing Process
Enable Reports
Track Activities
Track Field History
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window

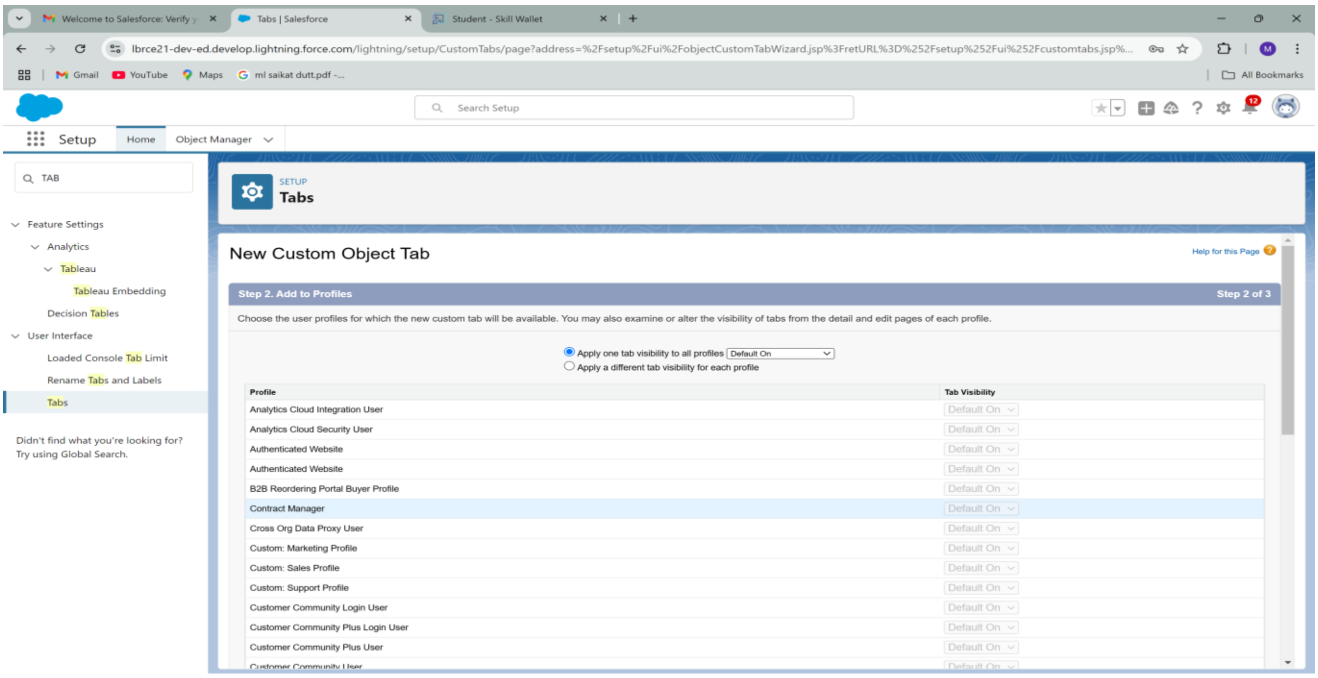
Tabs

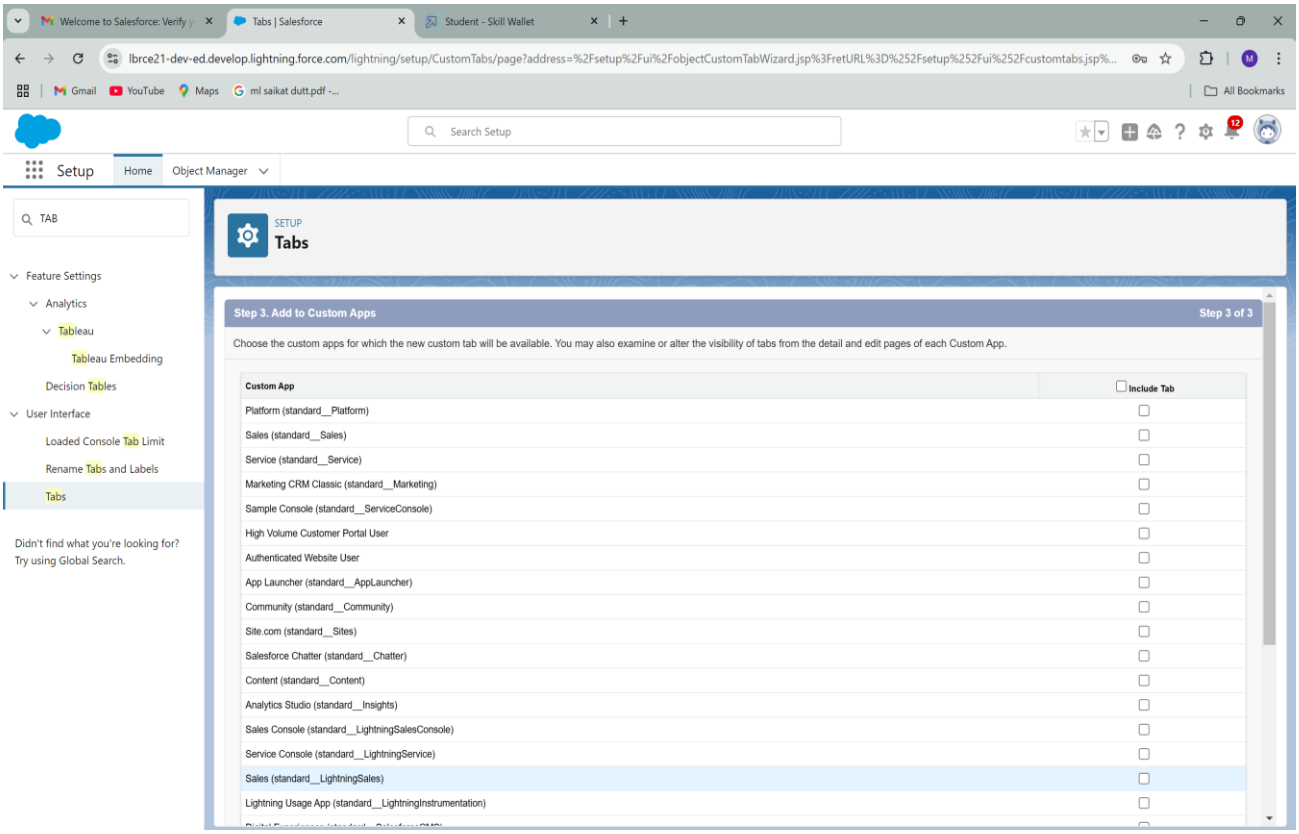
1) Creating a Custom Tab

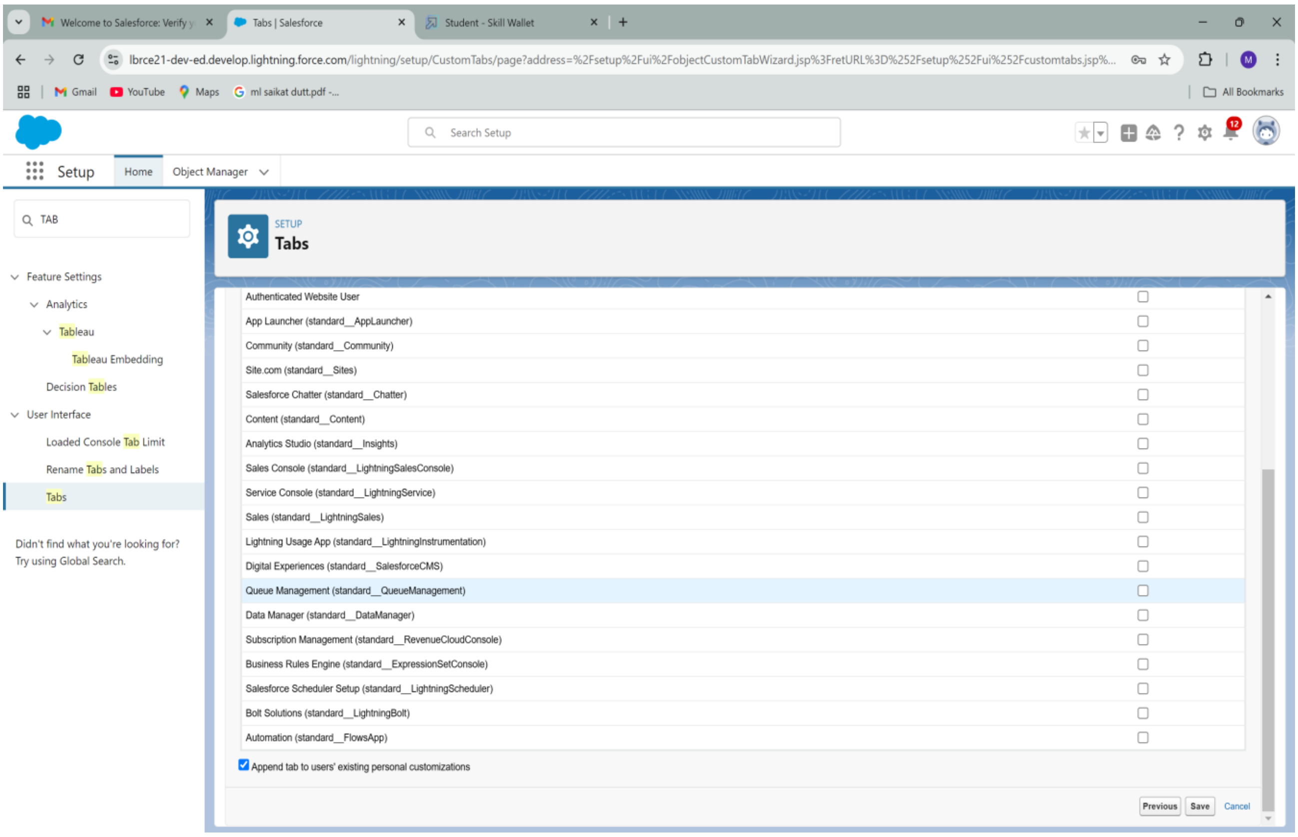
To create a Tab:( )

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



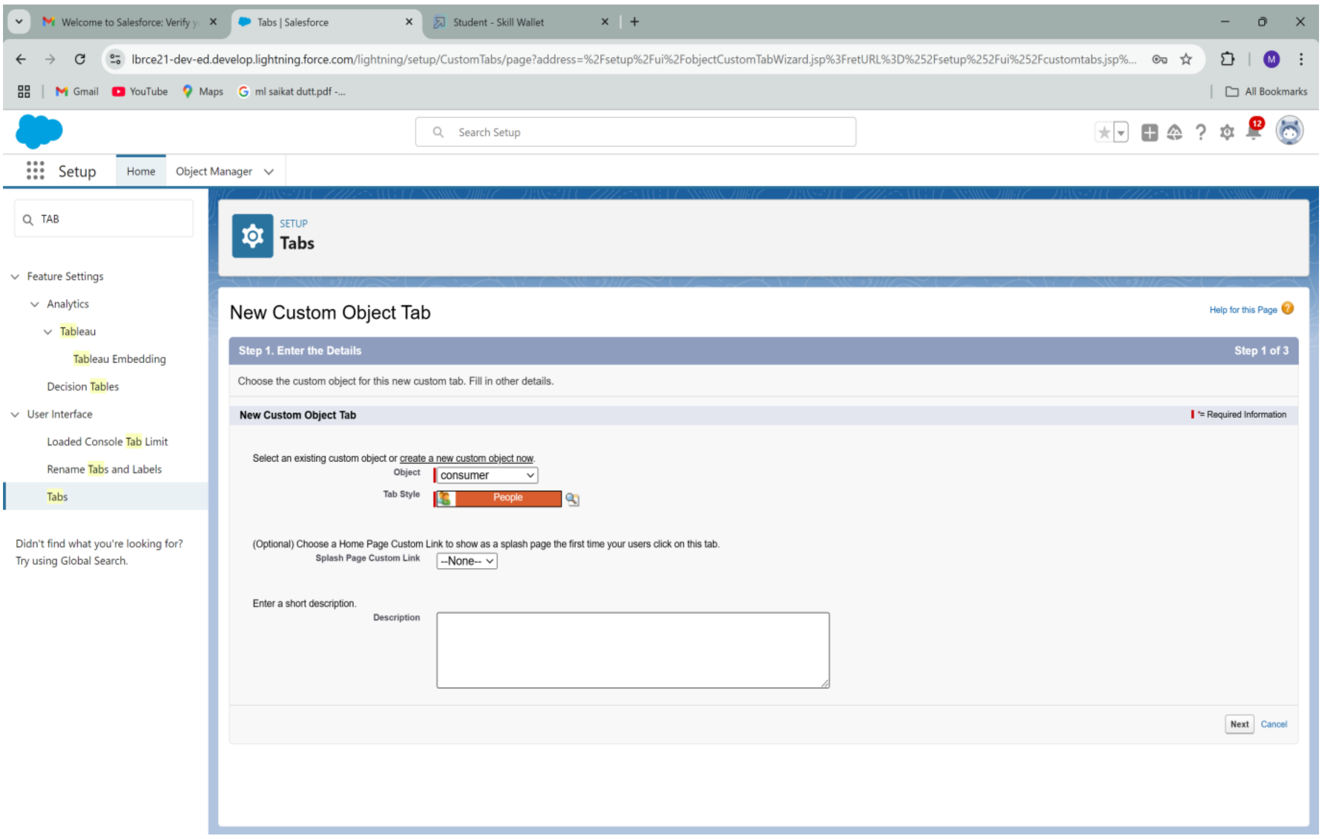


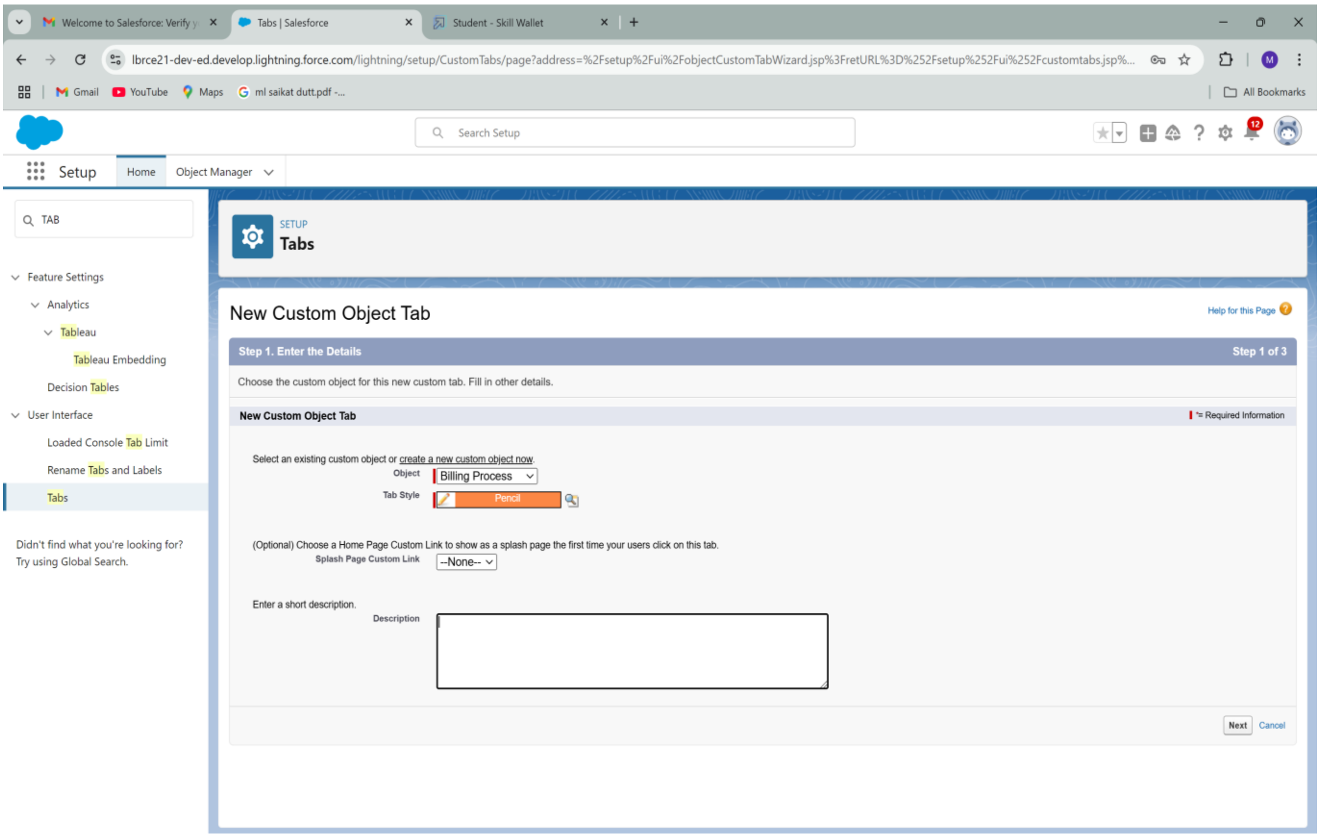


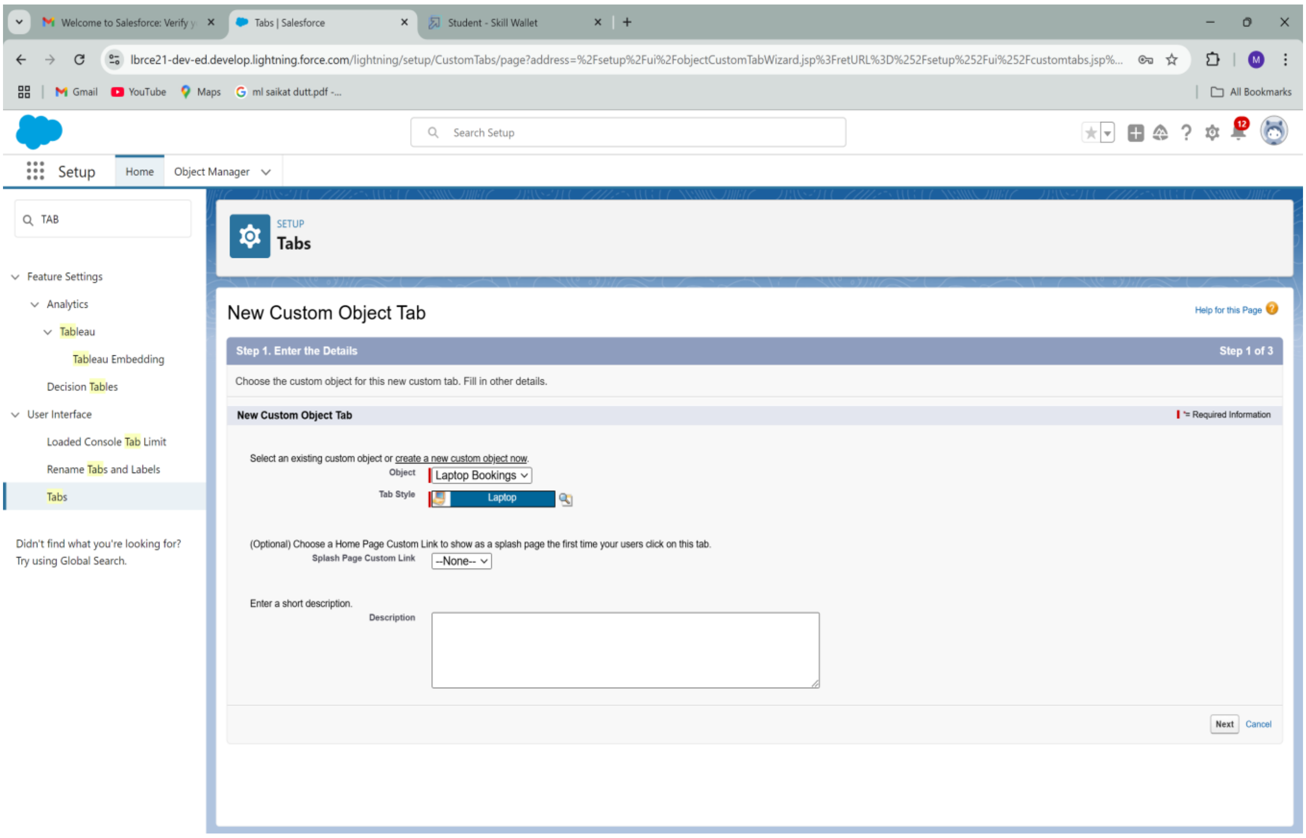


Activity 2: Creating Remaining Tabs

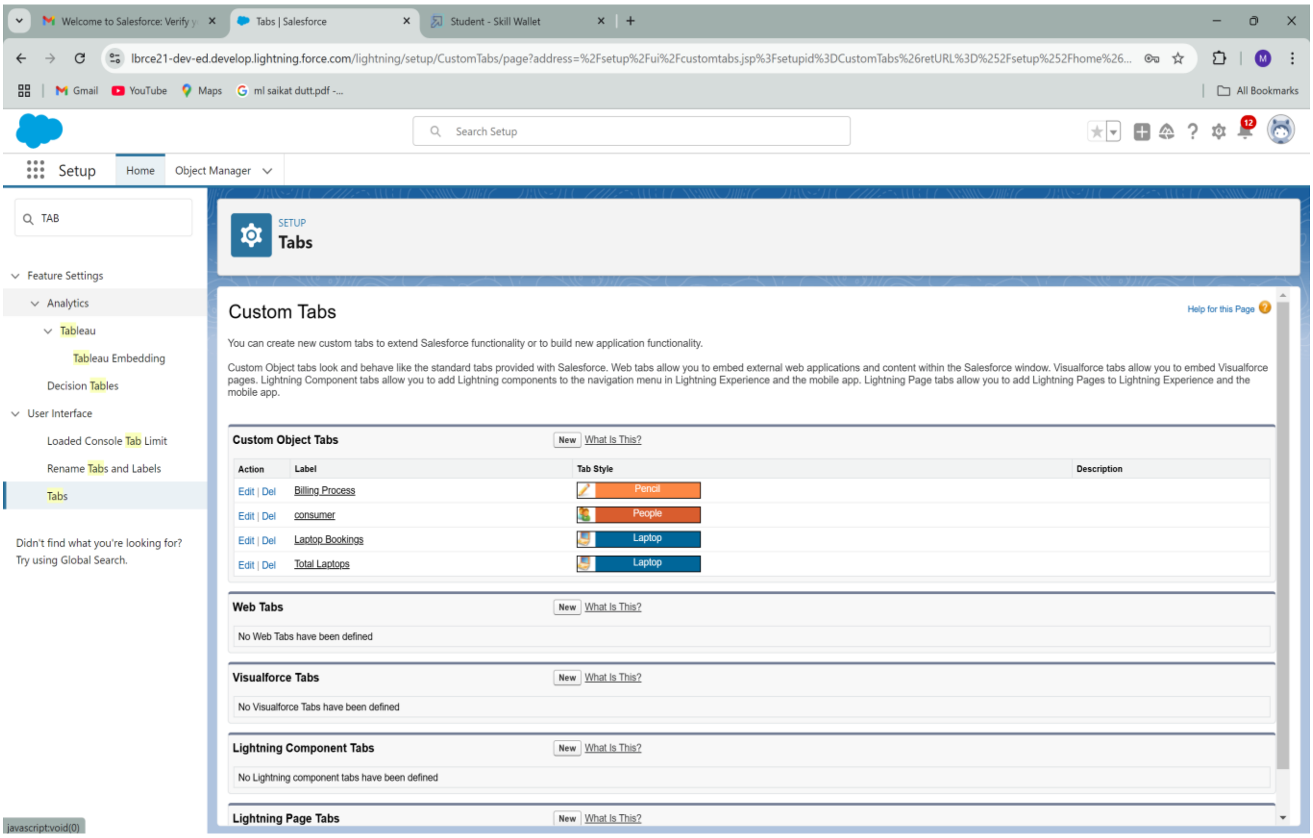
1. Now create the Tabs for the remaining Objects, they are “consumer,Laptop Booking,Billing process”.
2. Follow the same steps as mentioned in Activity -1 .


Welcome to Salesforce: Verify
Tabs | Salesforce
Student - Skill Wallet
lbrce21-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3FretURL%3D%252Fsetup%252Fui%252Fcustomtabs.jsp%...
Gmail
YouTube
Maps
ml saikat dutt.pdf -...
All Bookmarks
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
Help for this Page
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
= Required Information
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--
Enter a short description.
Description
Next
Cancel


Welcome to Salesforce: Verify
Tabs | Salesforce
Student - Skill Wallet
lbrce21-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3FretURL%3D%252Fsetup%252Fui%252Fcustomtabs.jsp%...
Gmail
YouTube
Maps
ml saikat dutt.pdf -...
All Bookmarks
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
Help for this Page
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
= Required Information
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--
Enter a short description.
Description
Next
Cancel



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



Setup
Tabs
Custom Tabs
You can create new custom tabs to extend Salesforce functionality or to build new application functionality.
Custom Object Tabs
Billing Process
consumer
Laptop Bookings
Total Laptops
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

Create a Lightning App

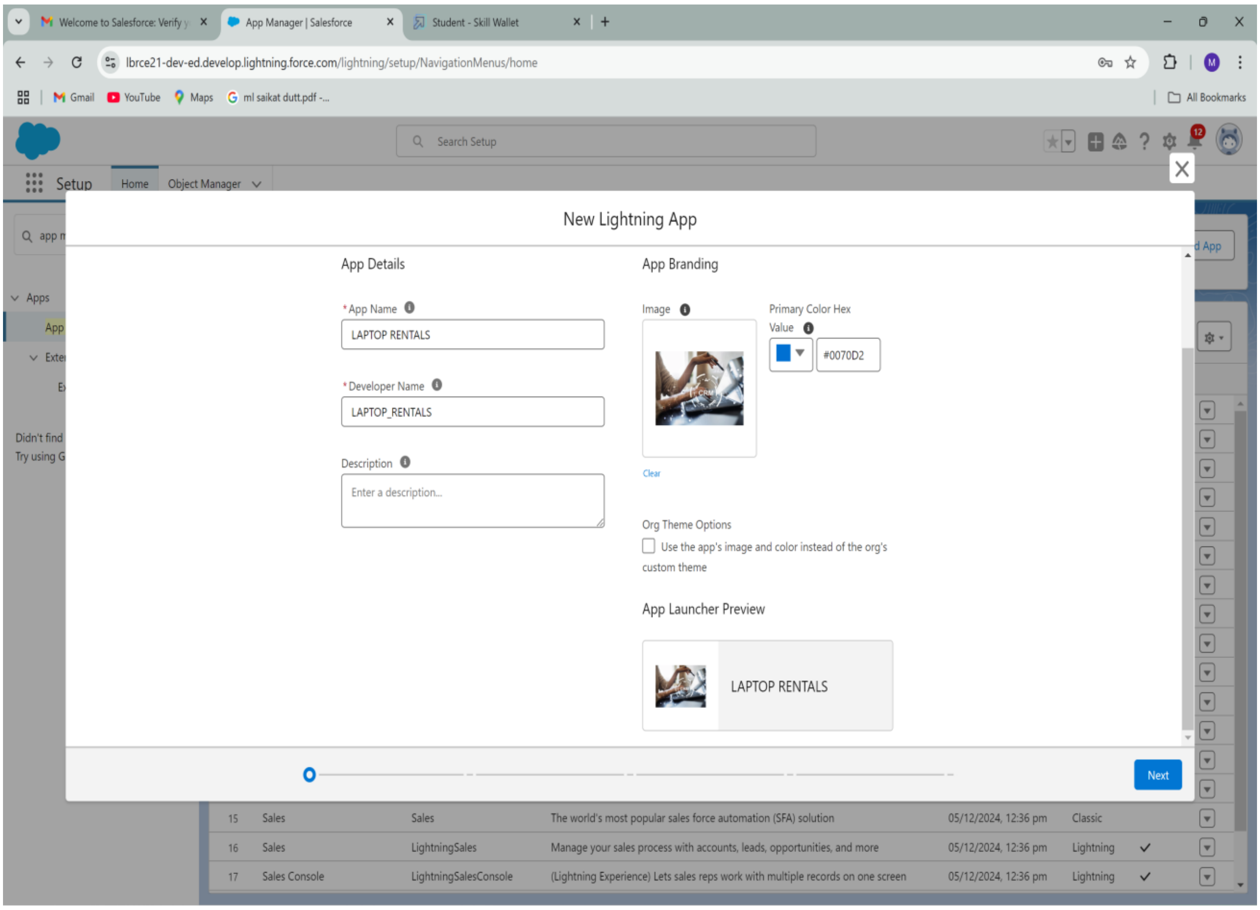
To create a lightning app page:

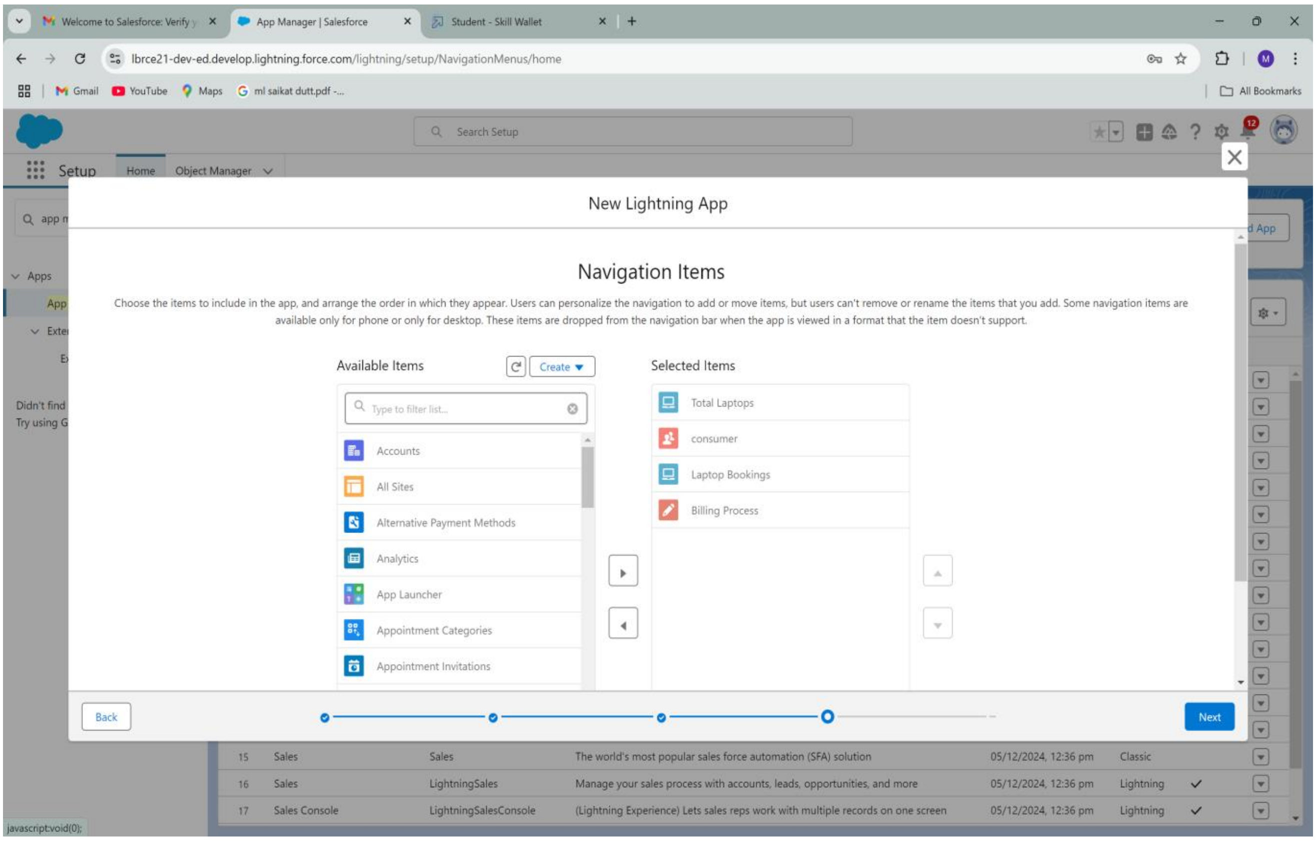
1. Go to setup page >> search "app manager" in quick find >> select "app manager" >> click on New lightning App.
2. Fill the app name in app details as LAPTOP RENTALS >>Next >> (App option page) keep it as default >> Next >> (Utility Items) keep it as default >> Next.
3. Upload a photo that is related 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.

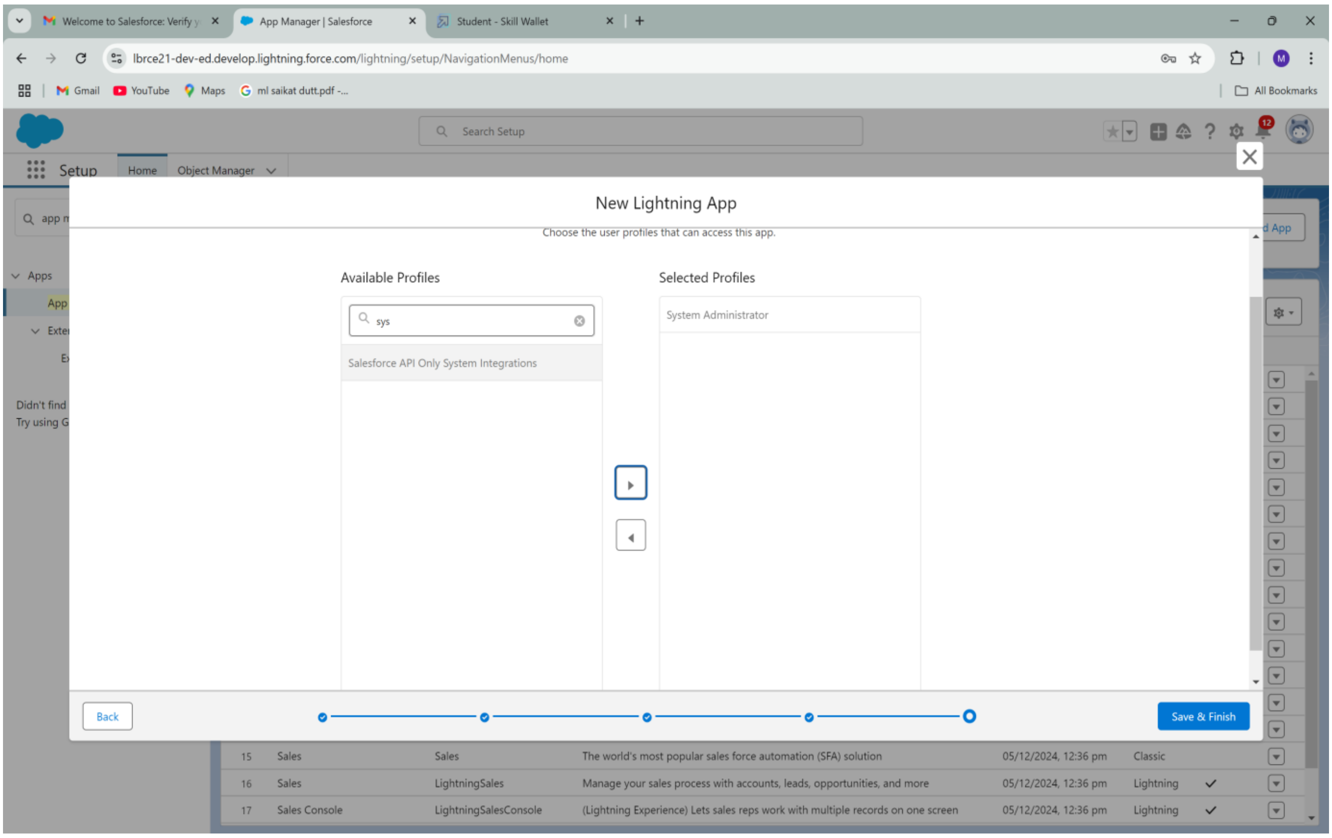
5. To Add User Profiles:

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





Move system administrator from left to right:



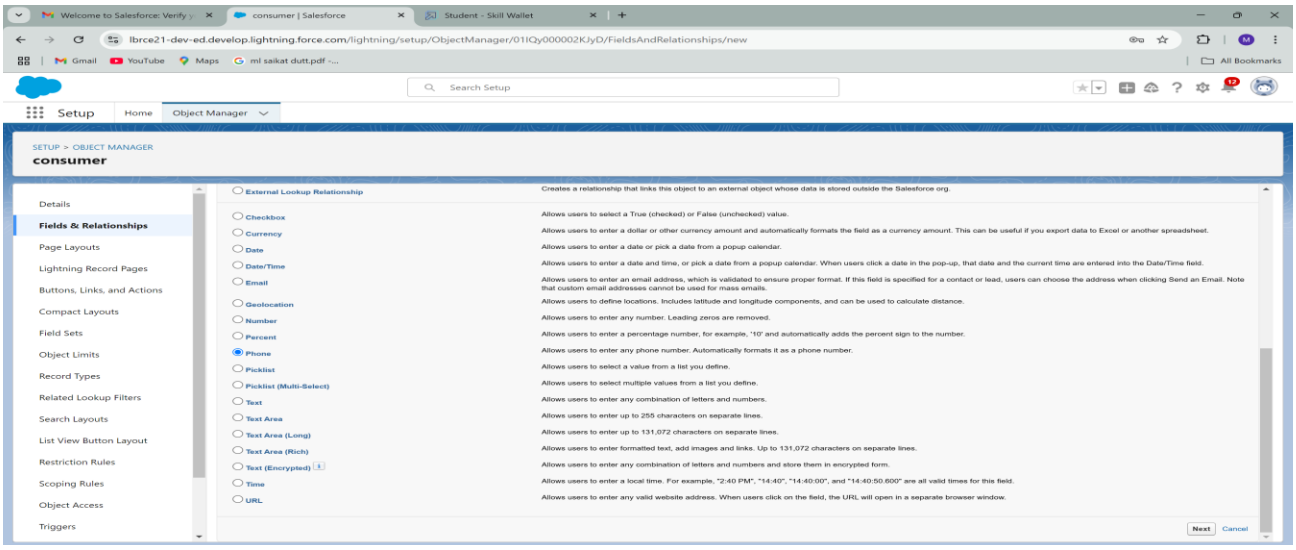
Fields

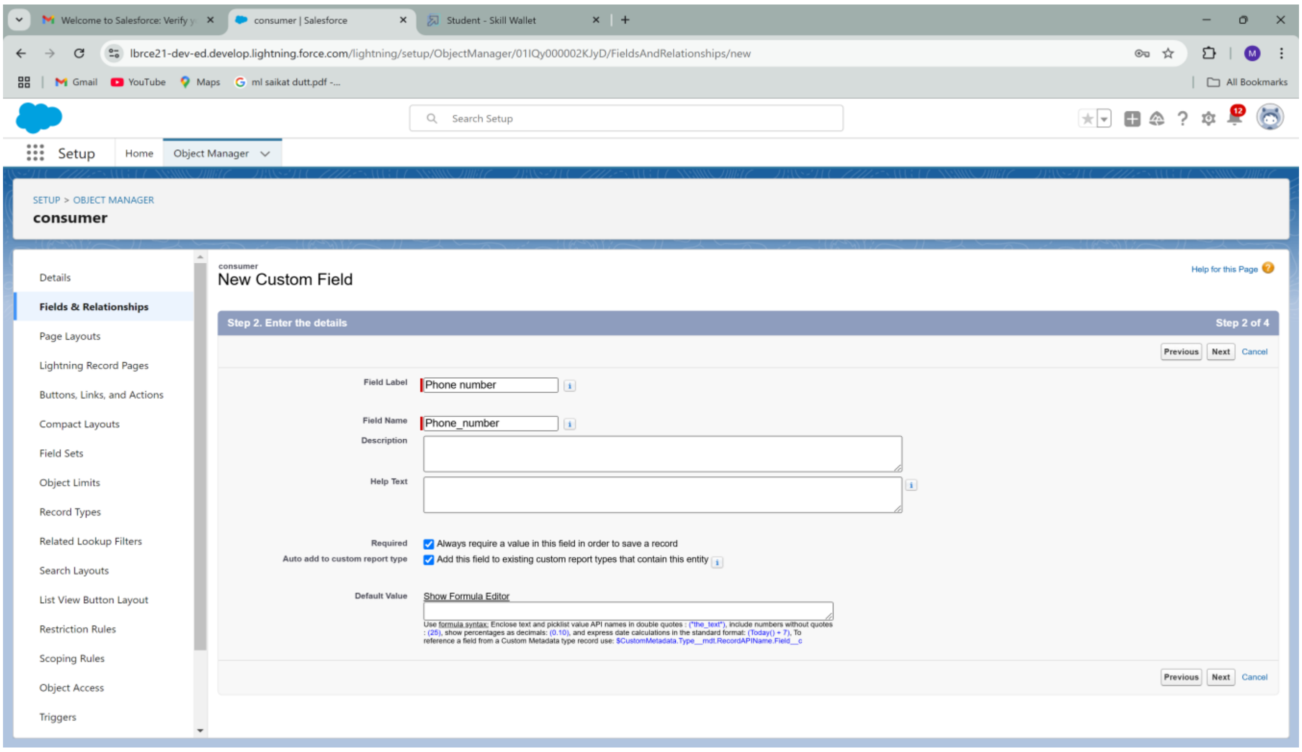
1) Creating the field in consumer object

To create fields in an object:

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

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

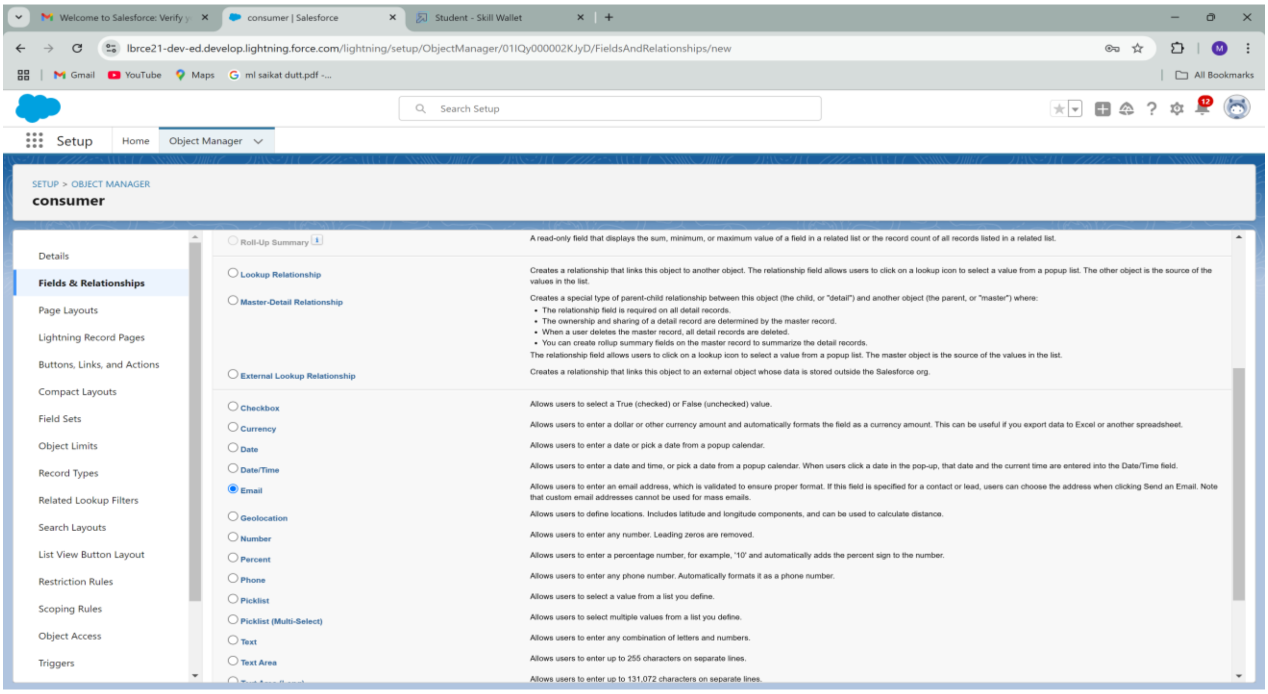


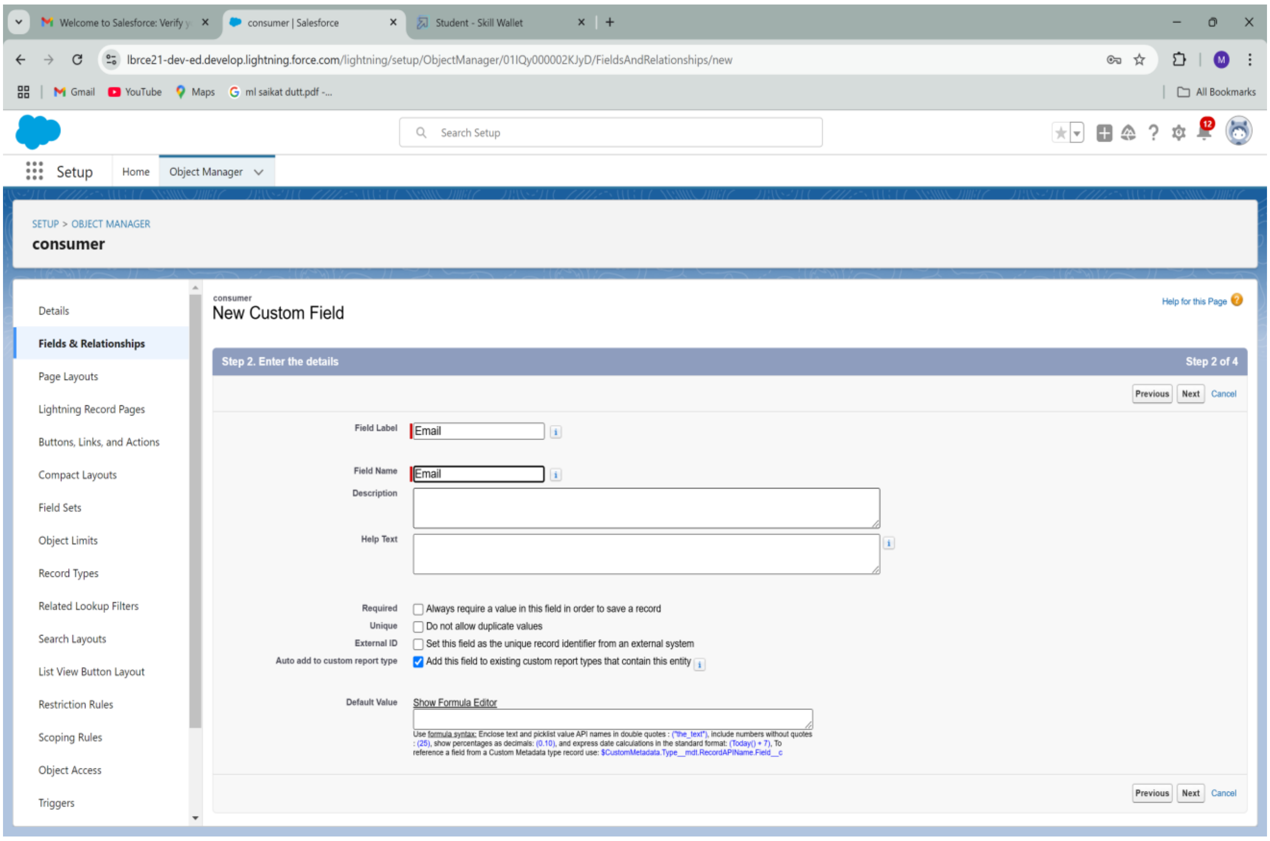


To create another fields in an object:

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.

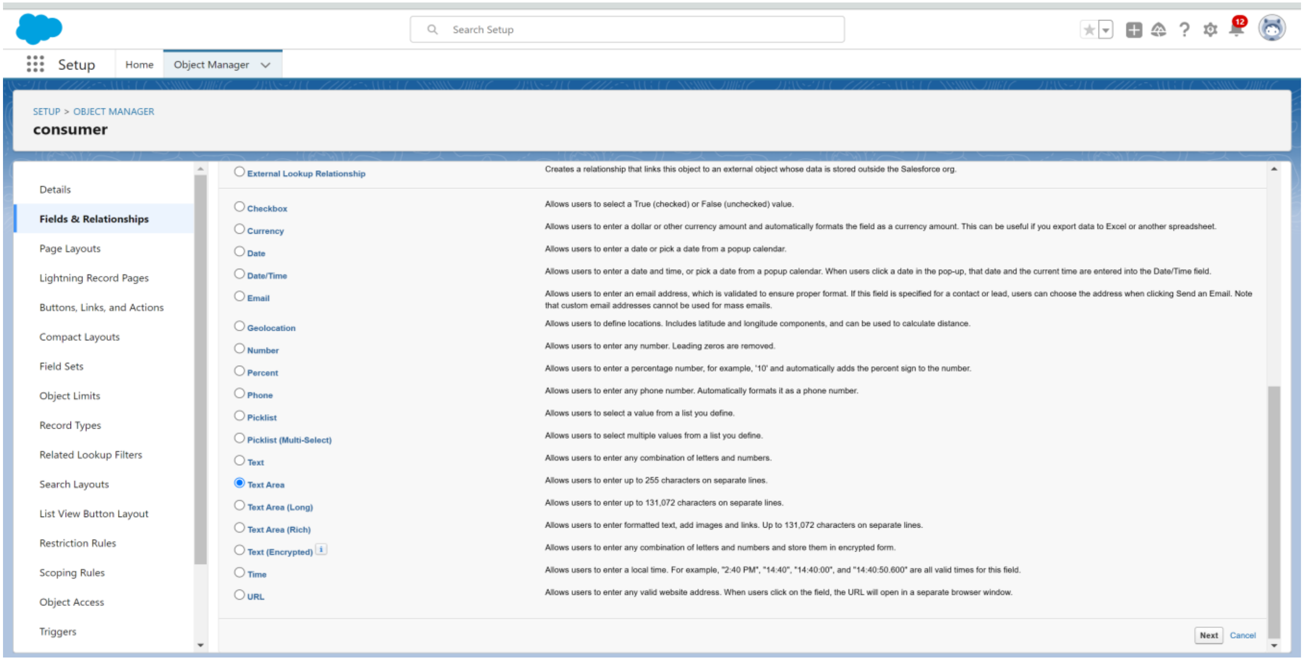


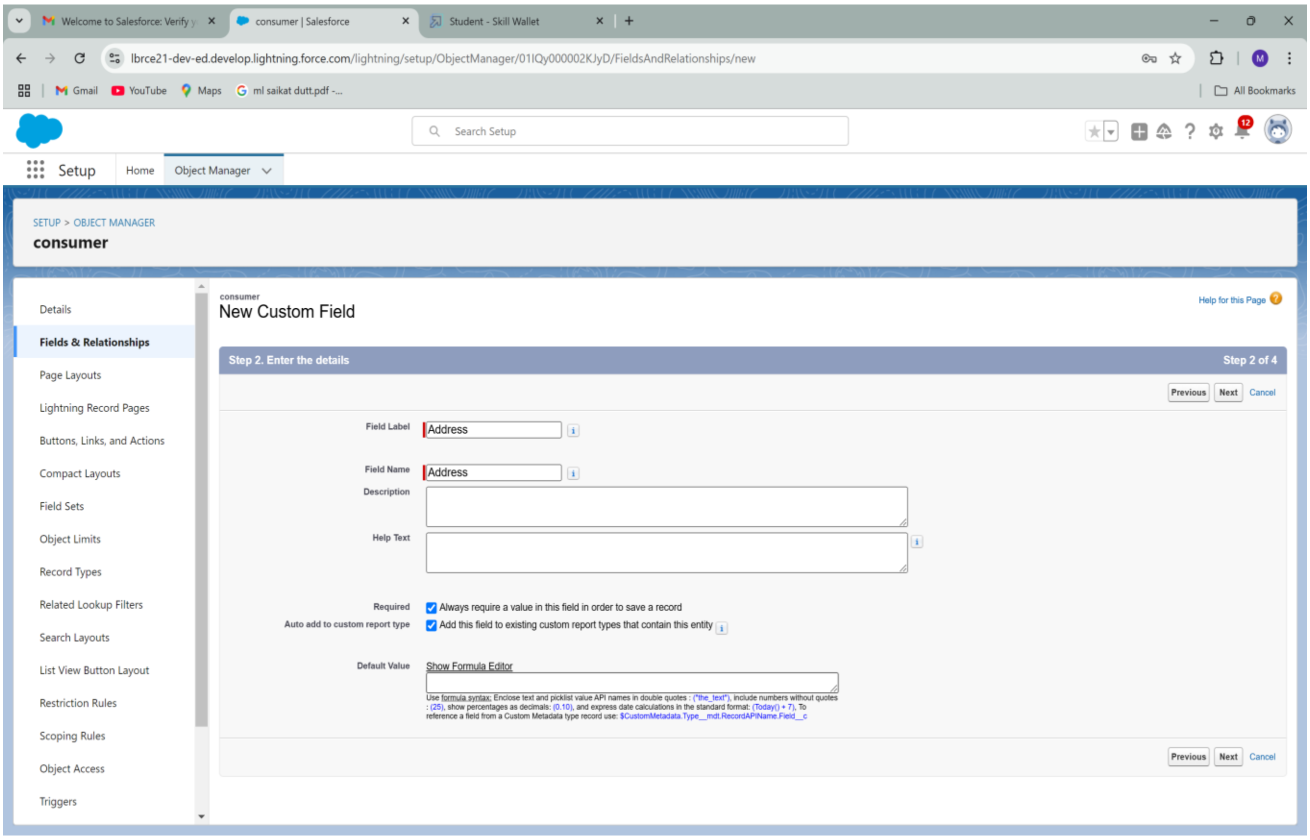


To create another fields in an object:

1. Go to setup >> click on Object Manager >> type object name(consumer) in search bar >> click on the object.
2. Now click on "Fields & Relationships" >> New
3. Select Data type as a "Text Area" and Click on Next
4. Fill the Above as following:

- Field Label: Address
- Field Name : It's gets auto generated
- Select Required field.
- Click on Next >> Next >> Save and new.





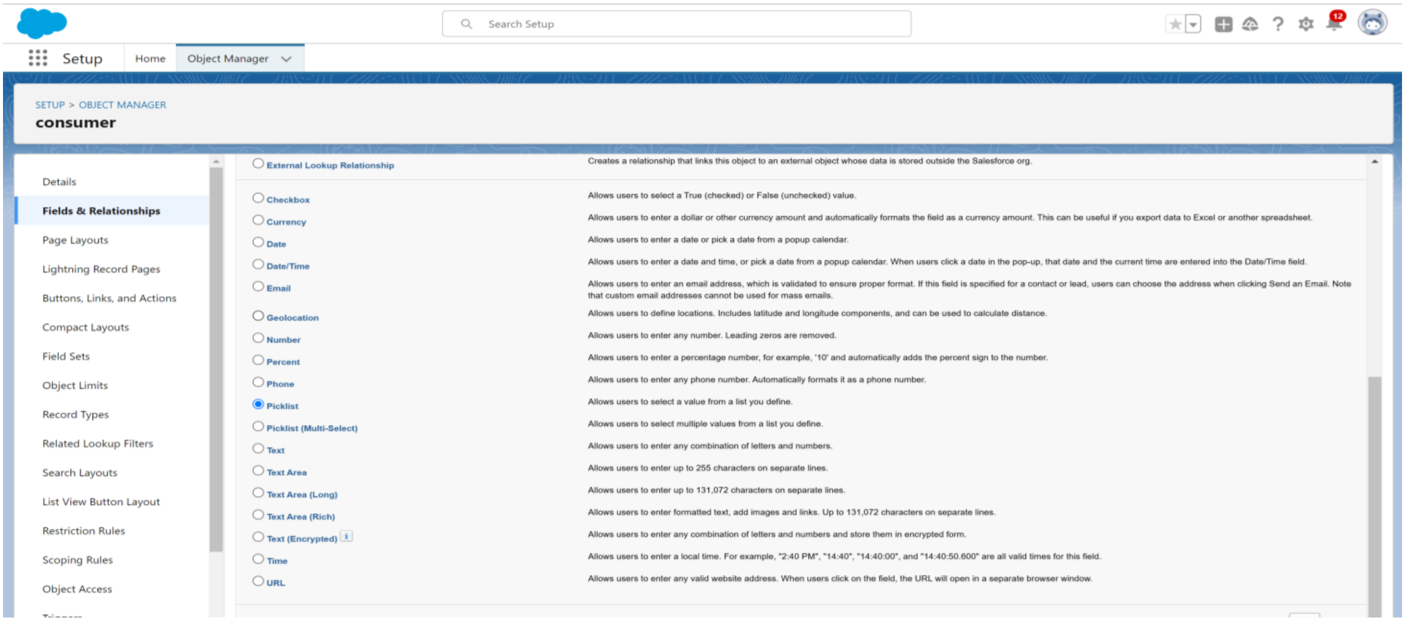
To create another fields in an object:

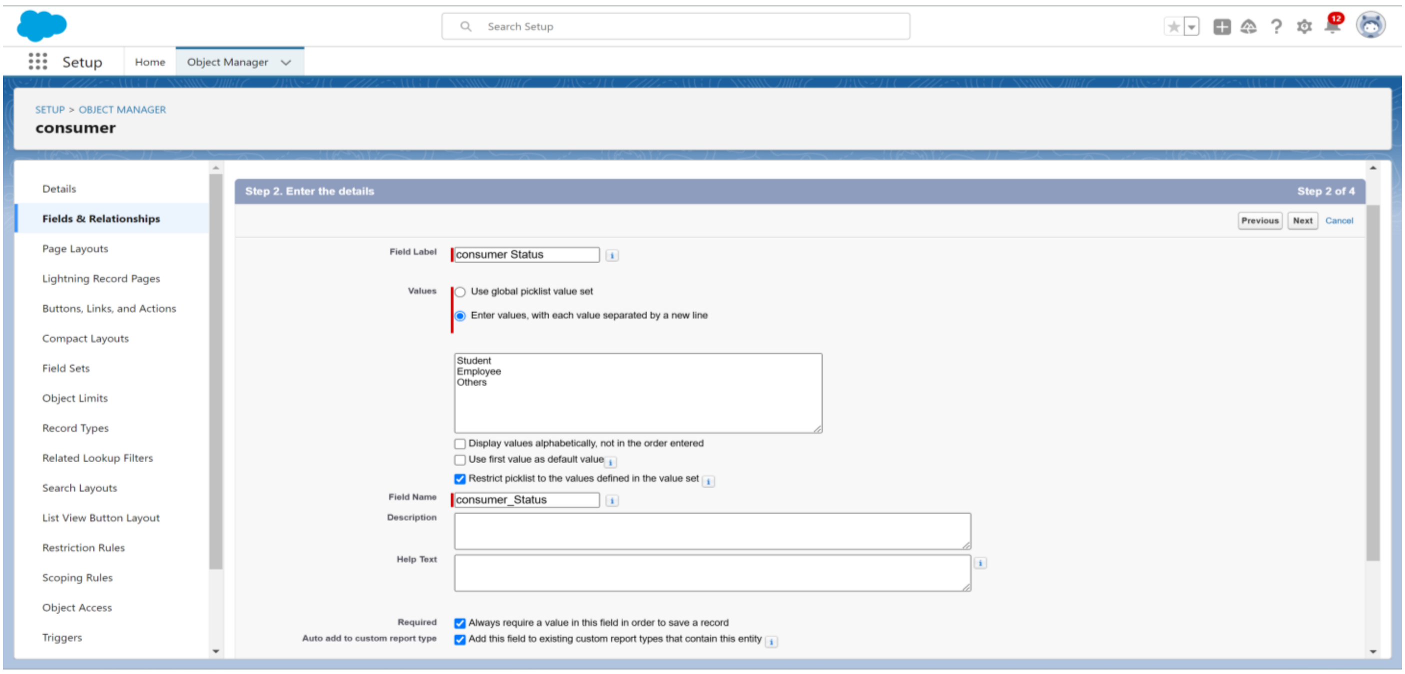
1. Go to setup >> click on Object Manager >> type object name(consumer) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as a “Picklist” and Click on Next
4. Fill the Above as following:

- 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.

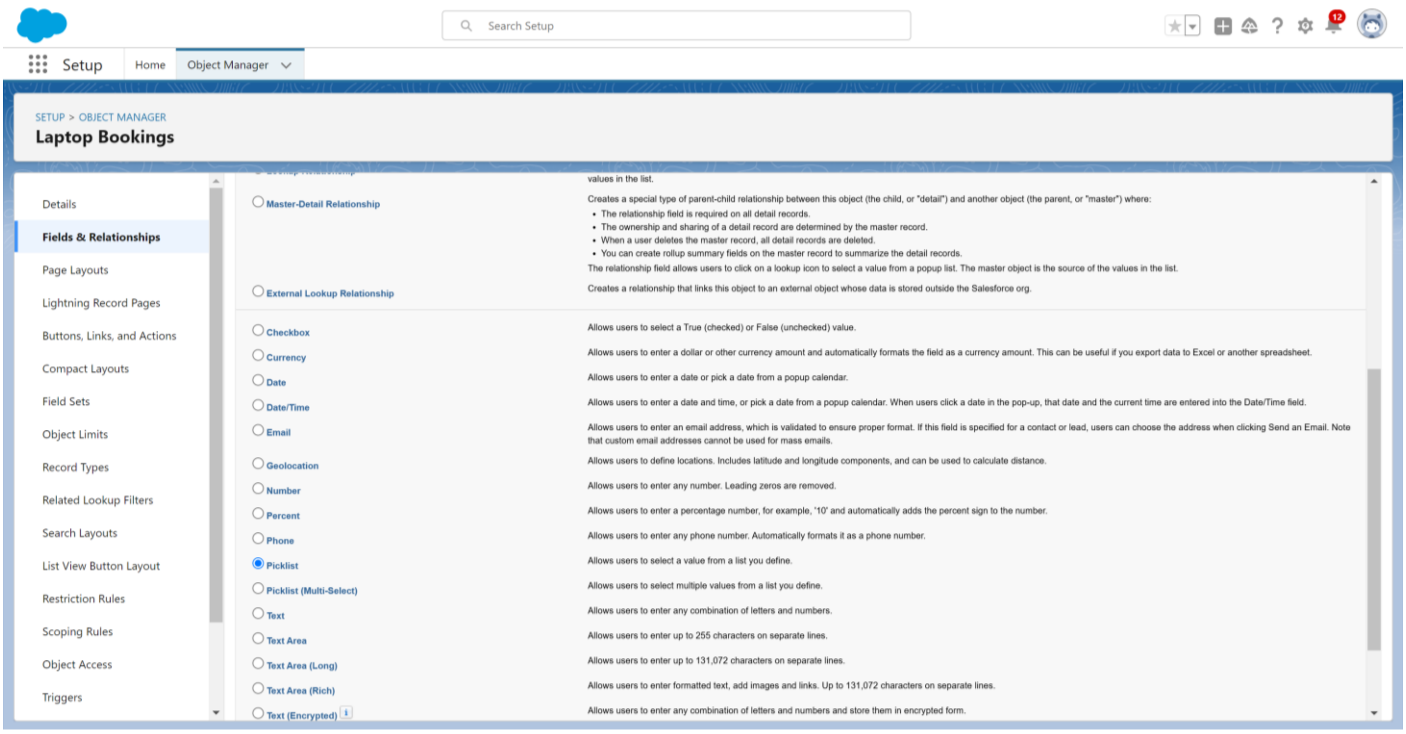


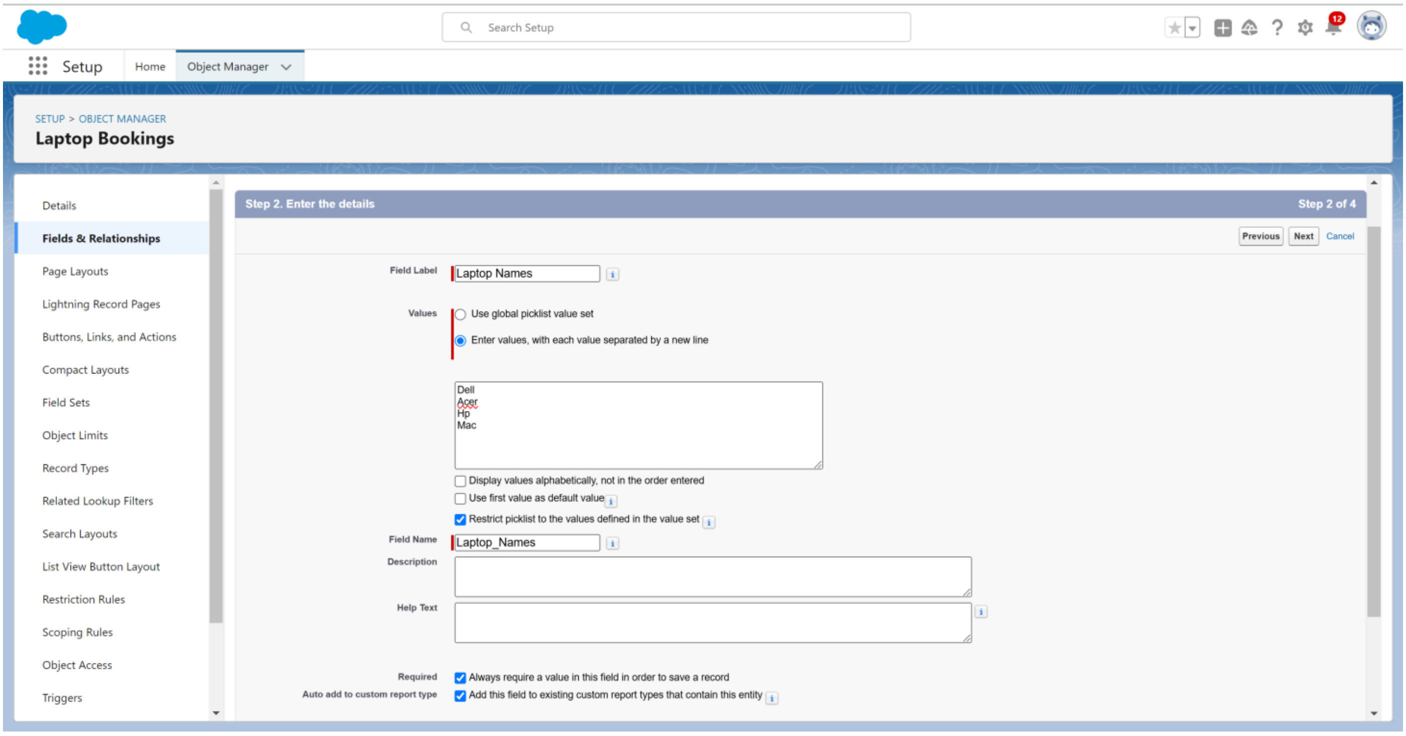


Creating the field in Laptops Bookings object

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

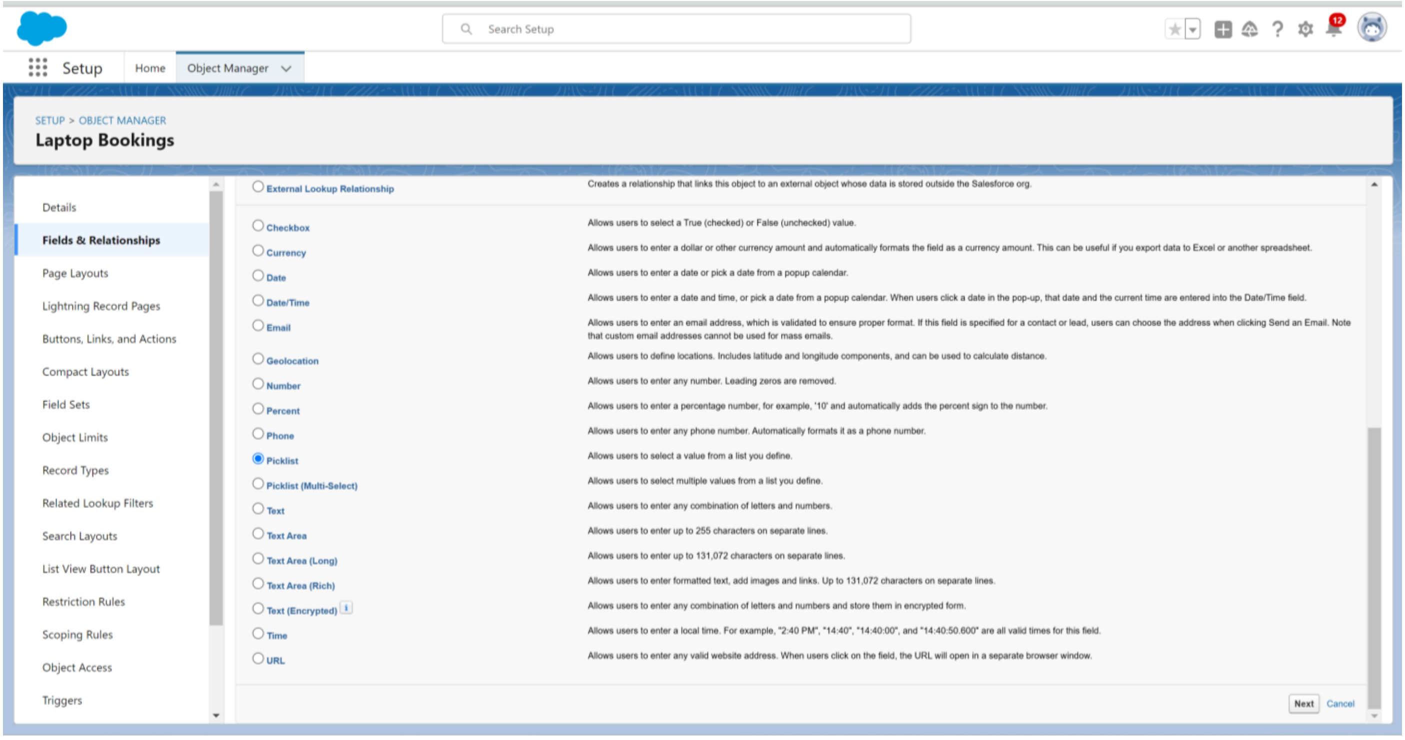


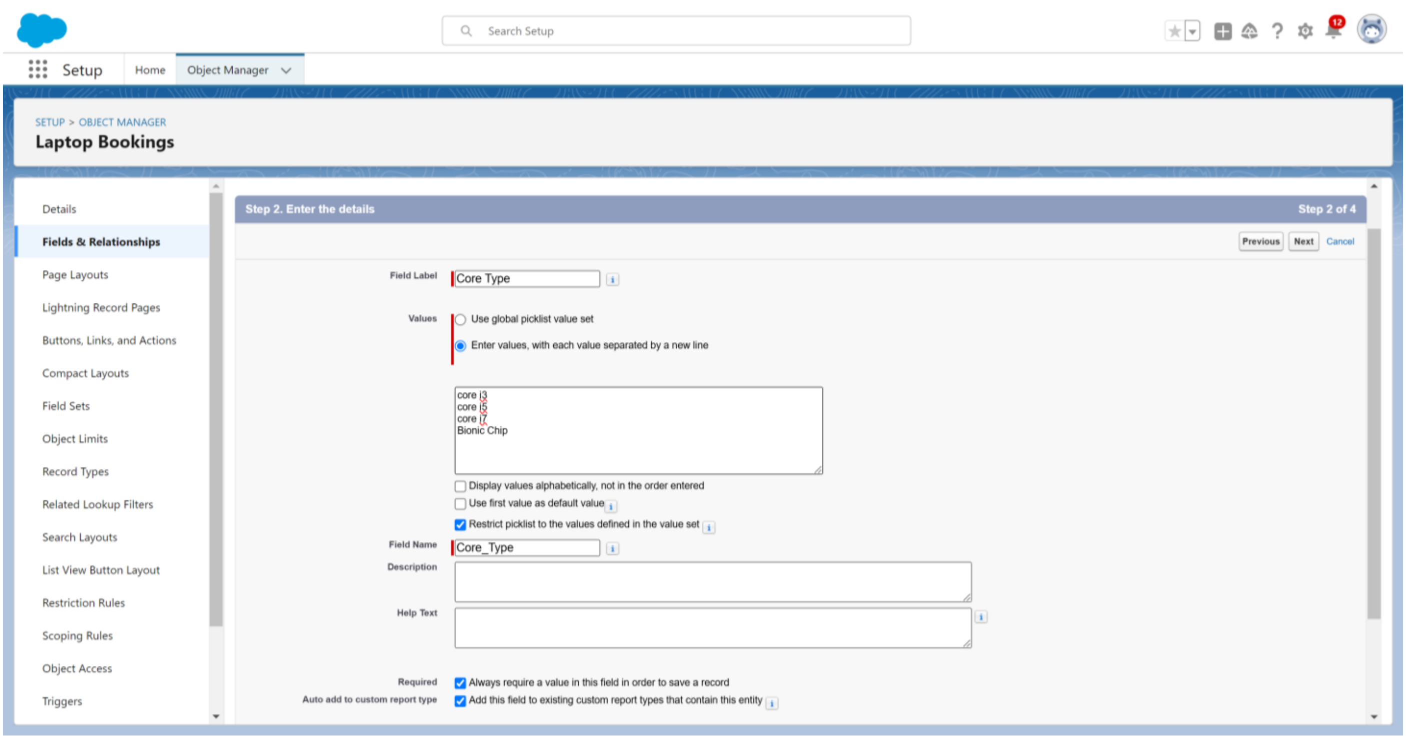


2. To Create a Fields & Relationship to an Laptop Booking Object

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

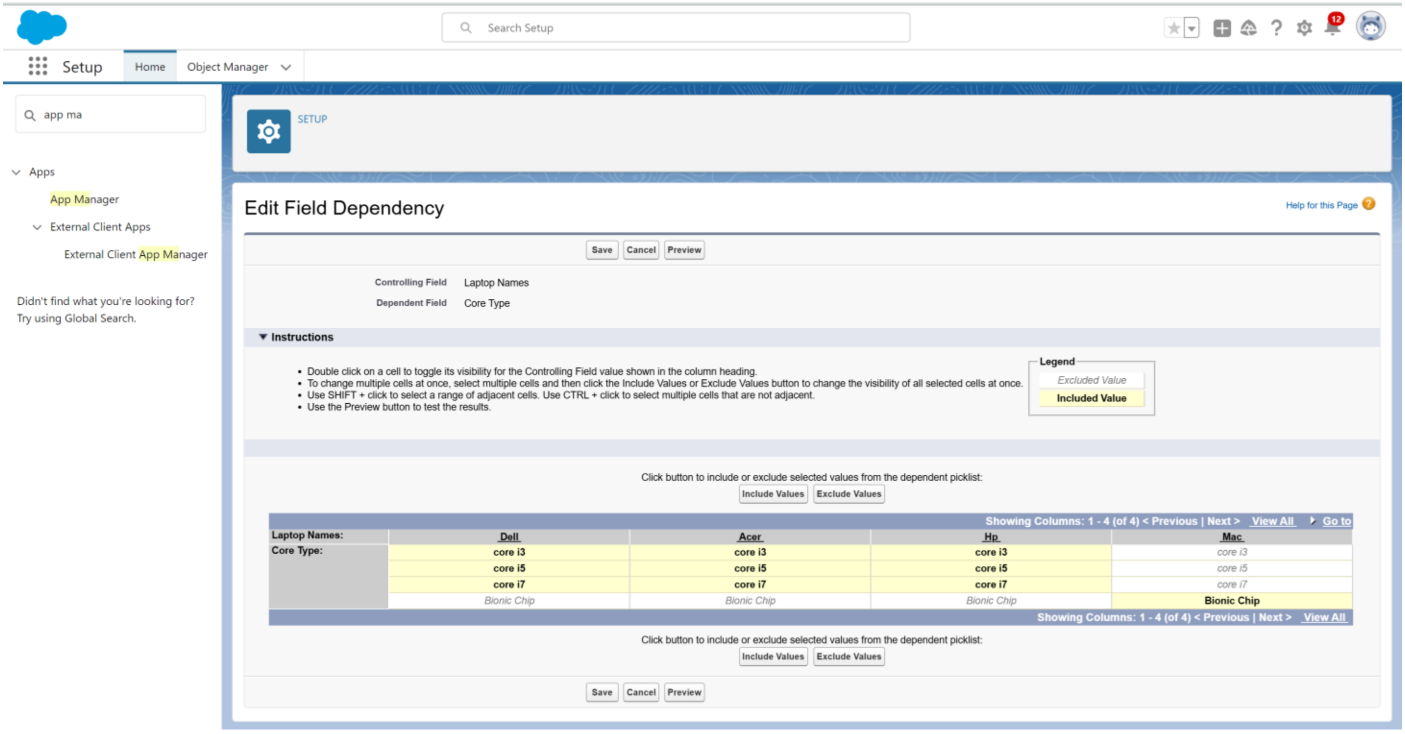




3. To Create a Field Dependency in the Laptop Booking Object

To create field dependency to an object:

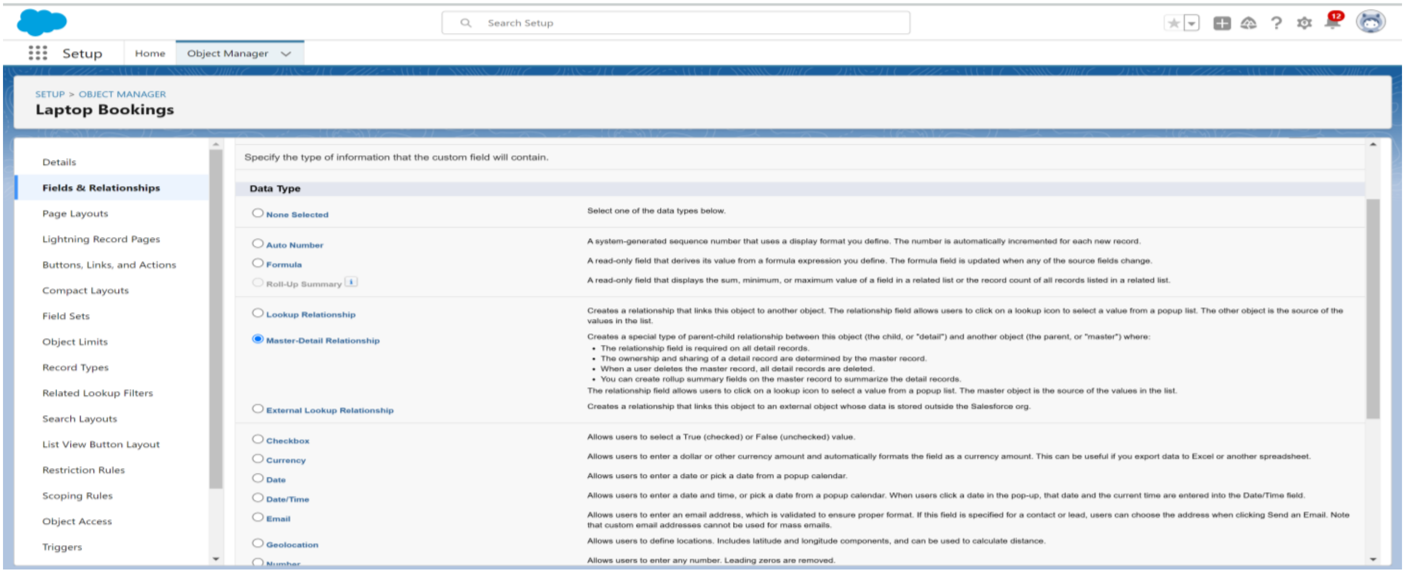
1. Go to setup >> click on Object Manager >> type object name(Laptop Booking) in the search bar >> click on the object.
2. click field dependency and next
3. Select **Controlling Field** as Laptop Names and **Dependent Field** as Core Type
4. Click the include value for dell-core i3,i5,i7 and for acer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

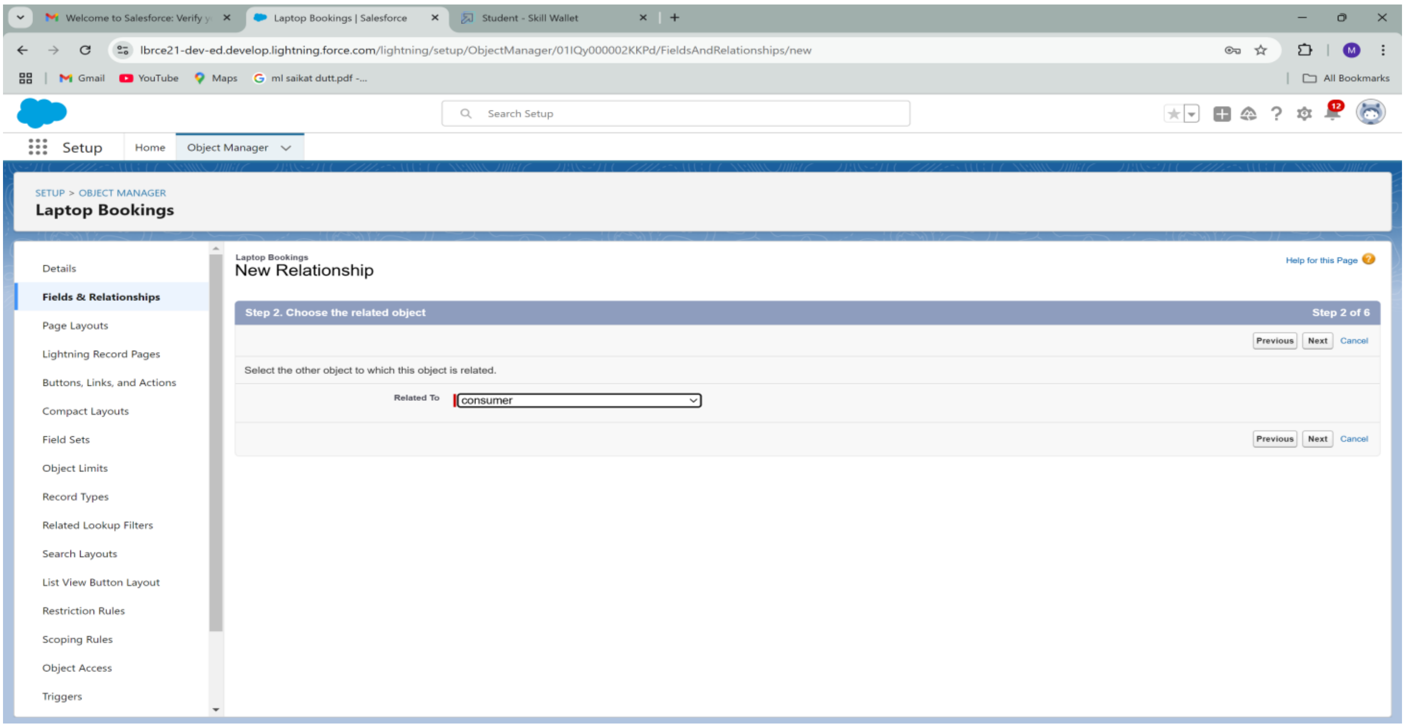


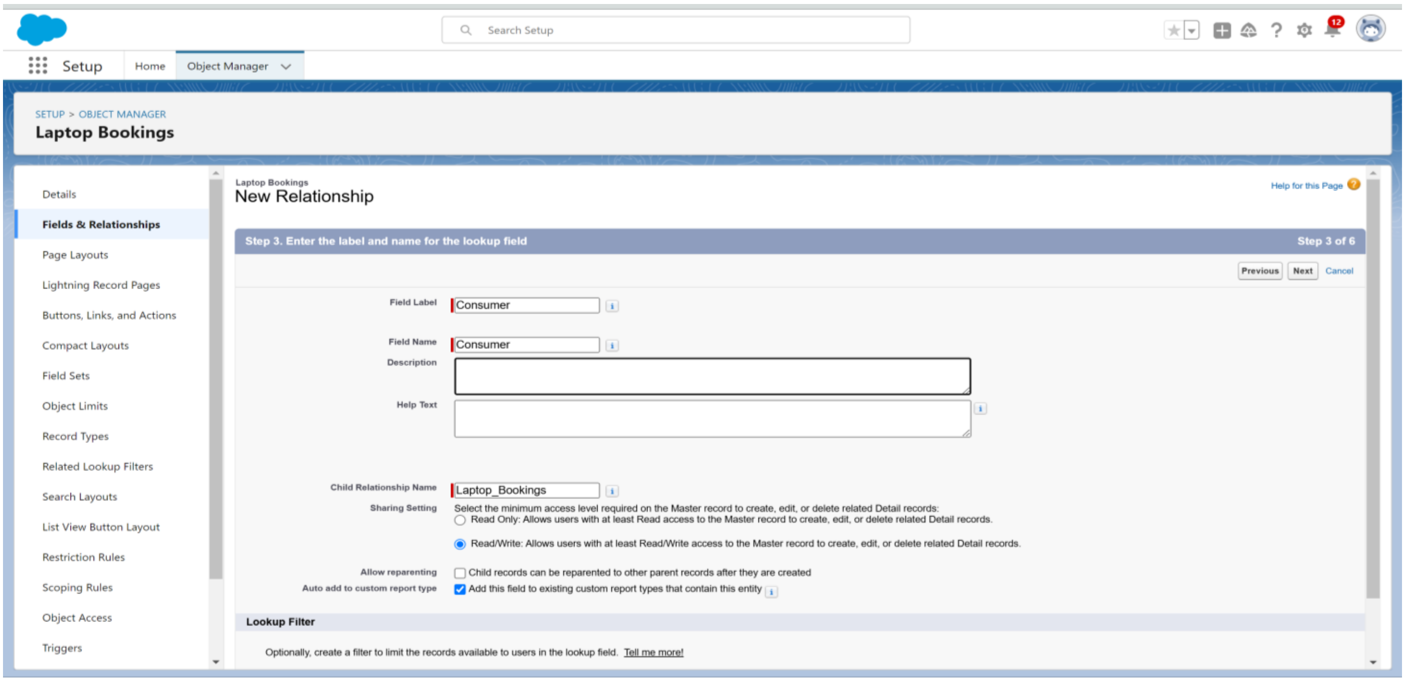
To Create a Fields & Relationship to an Laptop Booking and Total Laptops Objects

To create fields & relationship to an object:

1. Go to setup >> click on Object Manager >> type object name(Laptop Booking) in the search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data Type as a “Master-Detail Relationship”
4. Click on Next
5. Click on the Related to drop down and Select the “consumer” object and click on Next
6. Fill the Above as following:
   - Change the Field Label: Consumer
   - Field Name :It’s gets auto generated
7. Click on Next >> Next >> Save and new.


Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Laptop Bookings
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Triggers
Specify the type of information that the custom field will contain.
Data Type
None Selected
Select one of the data types below.
Auto Number
A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
Formula
A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
Roll-Up Summary
A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
Lookup Relationship
Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
Master-Detail Relationship
Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
The relationship field is required on all detail records.
The ownership and sharing of a detail record are determined by the master record.
When a user deletes the master record, all detail records are deleted.
You can create rollup summary fields on the master record to summarize the detail records.
The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.
External Lookup Relationship
Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
Checkbox
Allows users to select a True (checked) or False (unchecked) value.
Currency
Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
Date
Allows users to enter a date or pick a date from a popup calendar.
Date/Time
Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
Email
Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
Geolocation
Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
Allows users to enter any number. Leading zeros are removed.

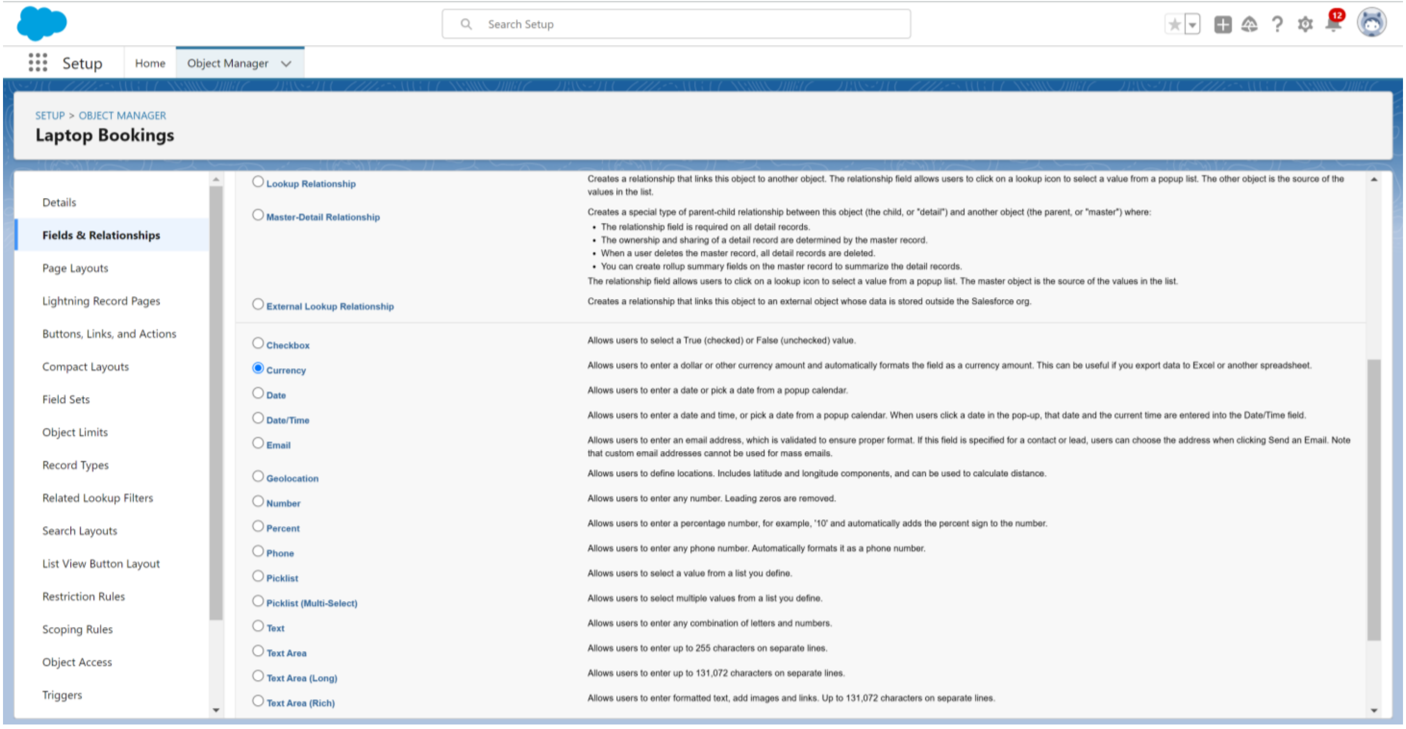

Welcome to Salesforce: Verify
Laptop Bookings | Salesforce
Student - Skill Wallet
lbrce21-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IQy000002KKPd/FieldsAndRelationships/new
Gmail
YouTube
Maps
ml saikat dutt.pdf -...
All Bookmarks
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Laptop Bookings
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Triggers
Laptop Bookings
New Relationship
Help for this Page
Step 2. Choose the related object
Step 2 of 6
Previous
Next
Cancel
Select the other object to which this object is related.
Related To
consumer

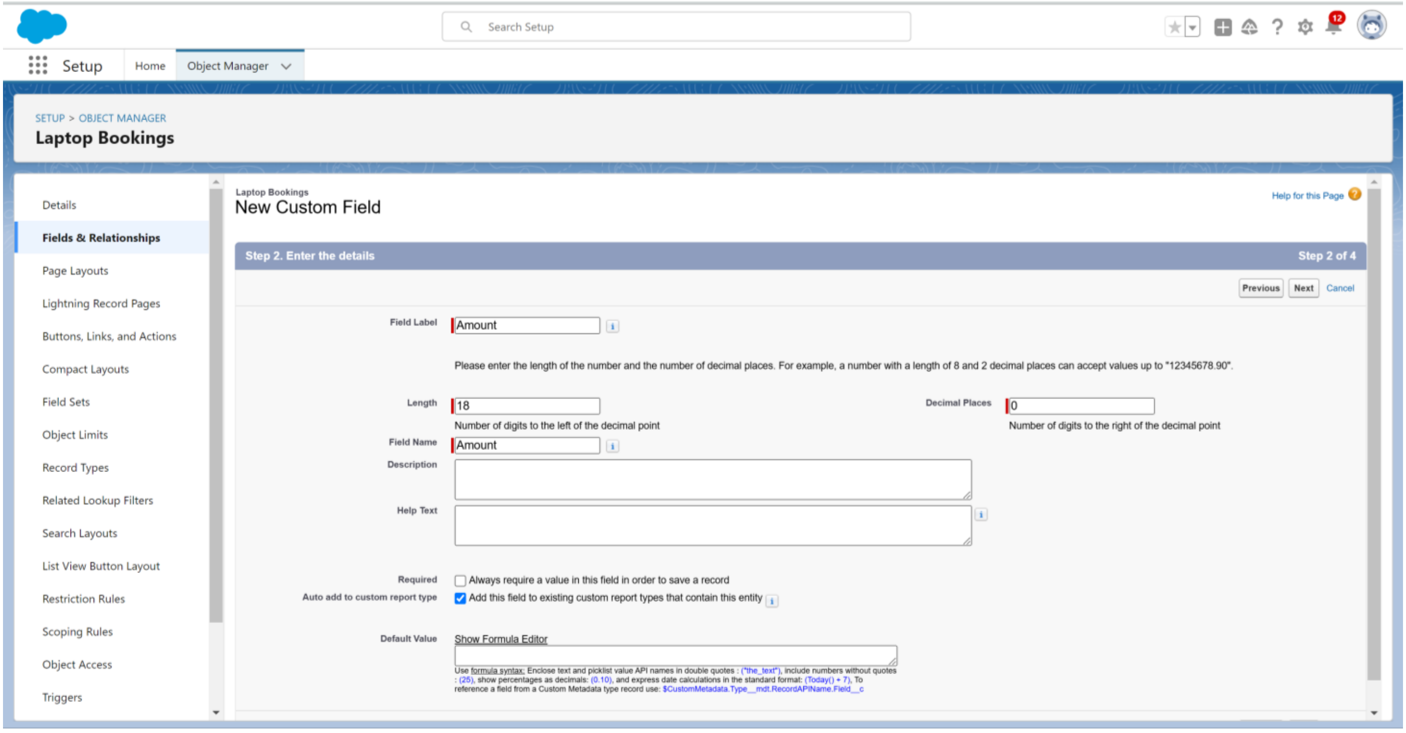

Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Laptop Bookings
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Triggers
Laptop Bookings
New Relationship
Help for this Page
Step 3. Enter the label and name for the lookup field
Step 3 of 6
Previous
Next
Cancel
Field Label
Consumer
Field Name
Consumer
Description
Help Text
Child Relationship Name
Laptop_Bookings
Sharing Setting
Select 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
Optionally, create a filter to limit the records available to users in the lookup field. Tell me more!

To create fields in an object:

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

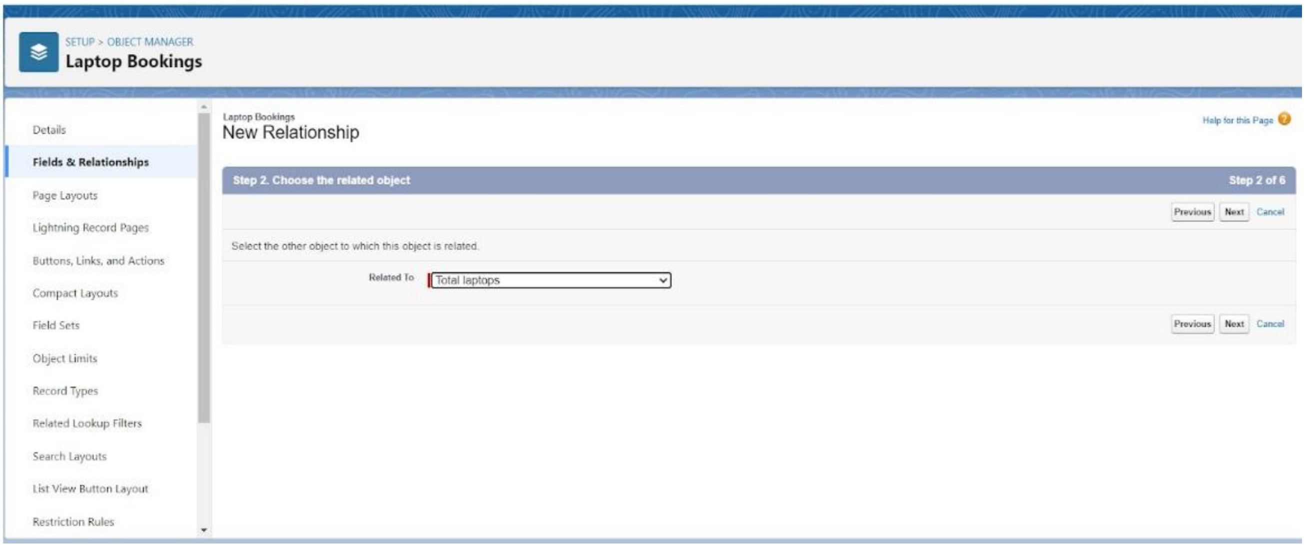
    - Field Label: Amount
    - Length: (18,0)
    - Field Name :It’s gets auto generated
    - Click on Next >> Next >> Save and new





To Create a Fields & Relationship to an Object

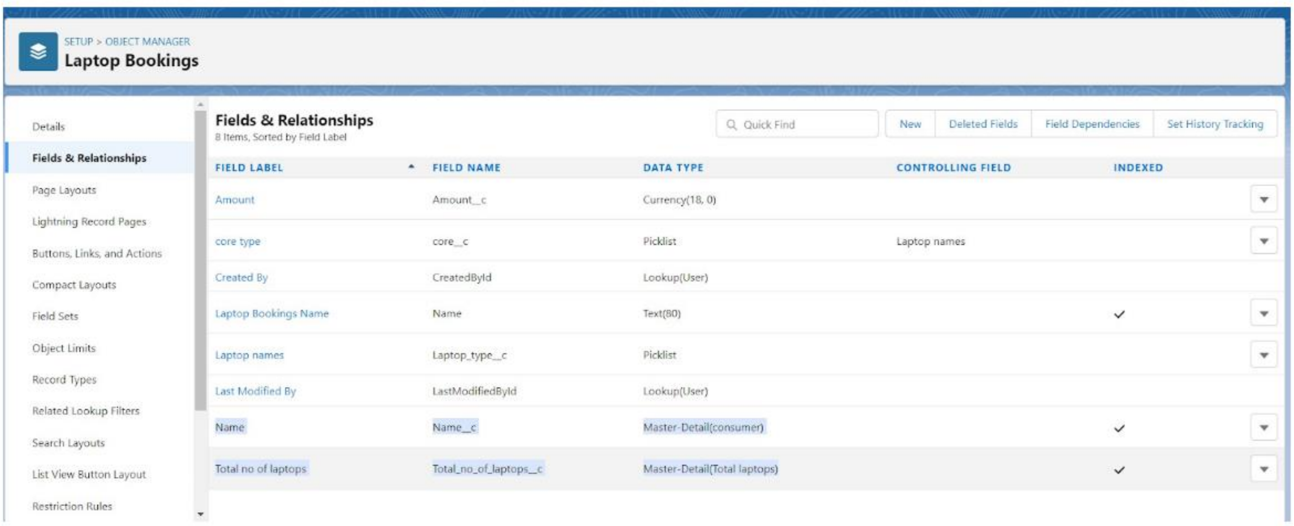
1. Go to setup >> click on Object Manager >> type object name(Laptop Booking) in the search bar >> click on the object.
2. Now click on "Fields & Relationships" >> New
3. Select Data Type as a "Master-Detail Relationship"
4. Click on Next
5. Click on the Related to drop down and Select the "Total Laptops" 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.



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

To create fields & relationship to an object:

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

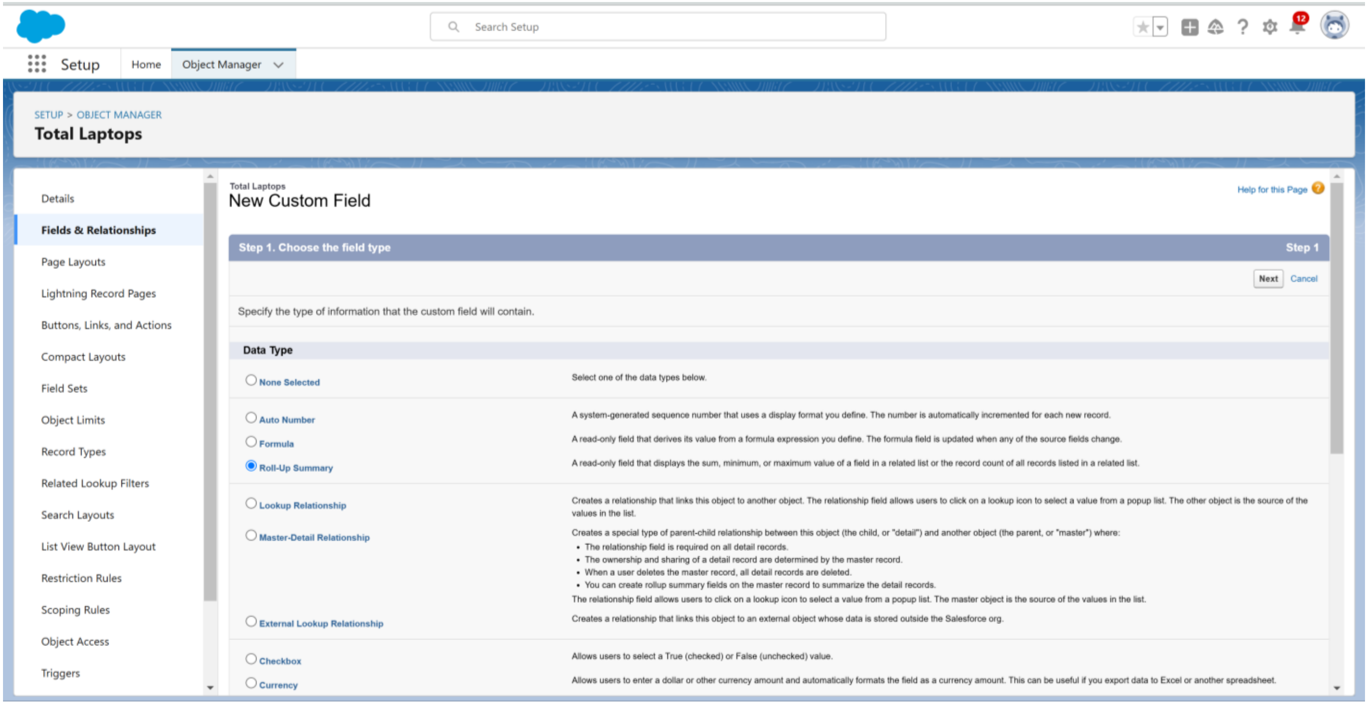


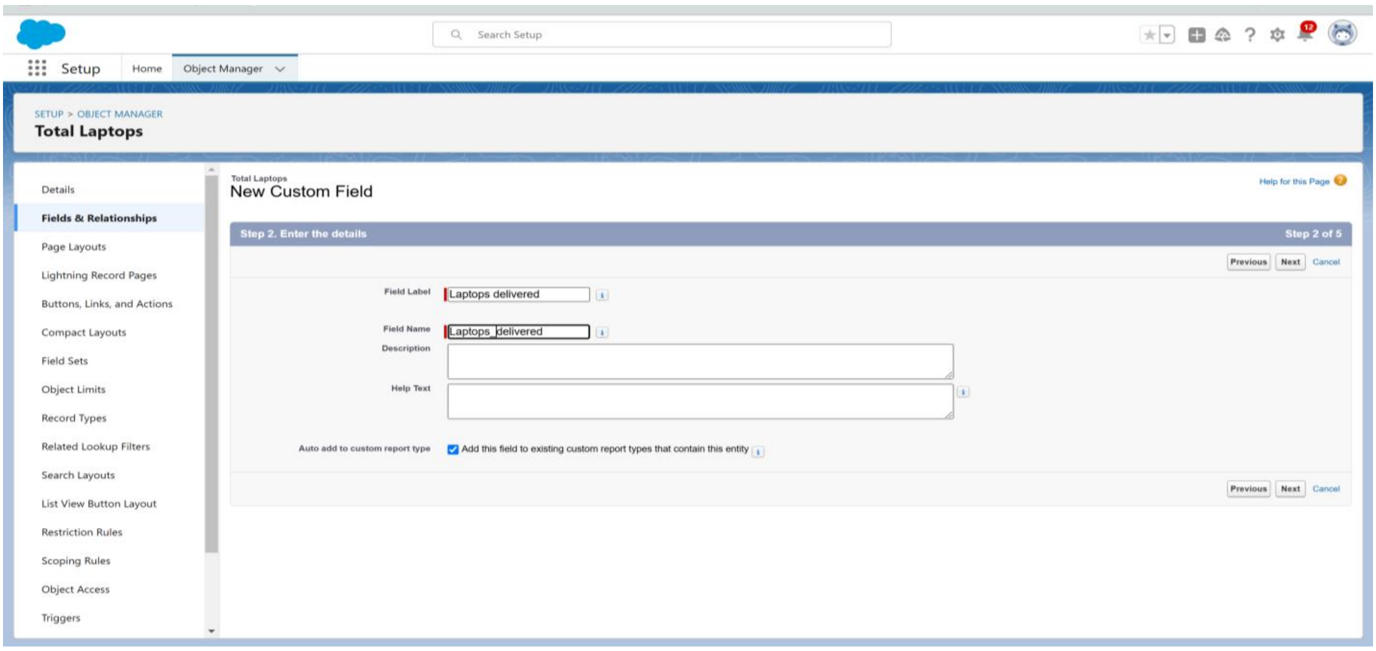
To Create a Rollup Summary Field in "Total Laptops Object"

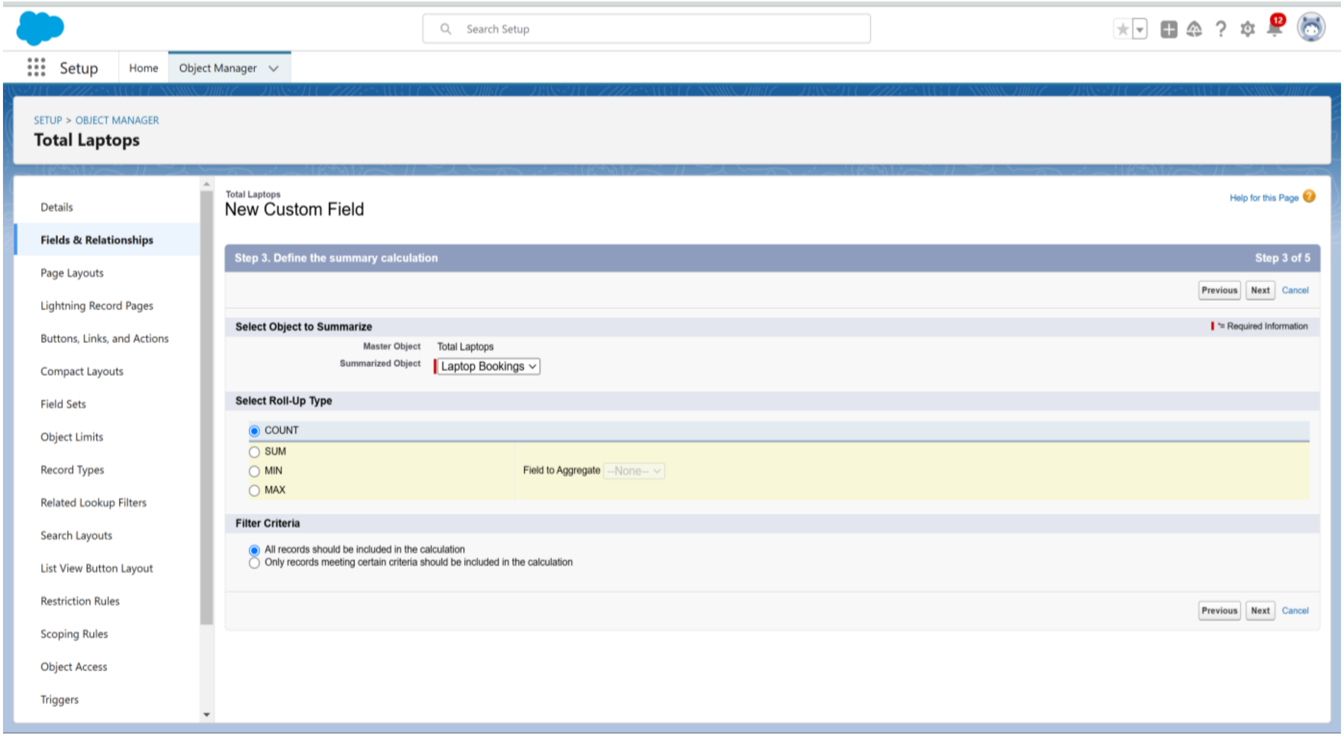
1. After Creating the Master-Detail Relationship Than Only you can create the Rollup Summary
2. Go to setup >> click on Object Manager >> type object name(Total Laptops) in the search bar >> click on the object.
3. Now click on "Fields & Relationships" >> New
4. Select Data type as a "Roll-up Summary" and Click on Next

   - 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.



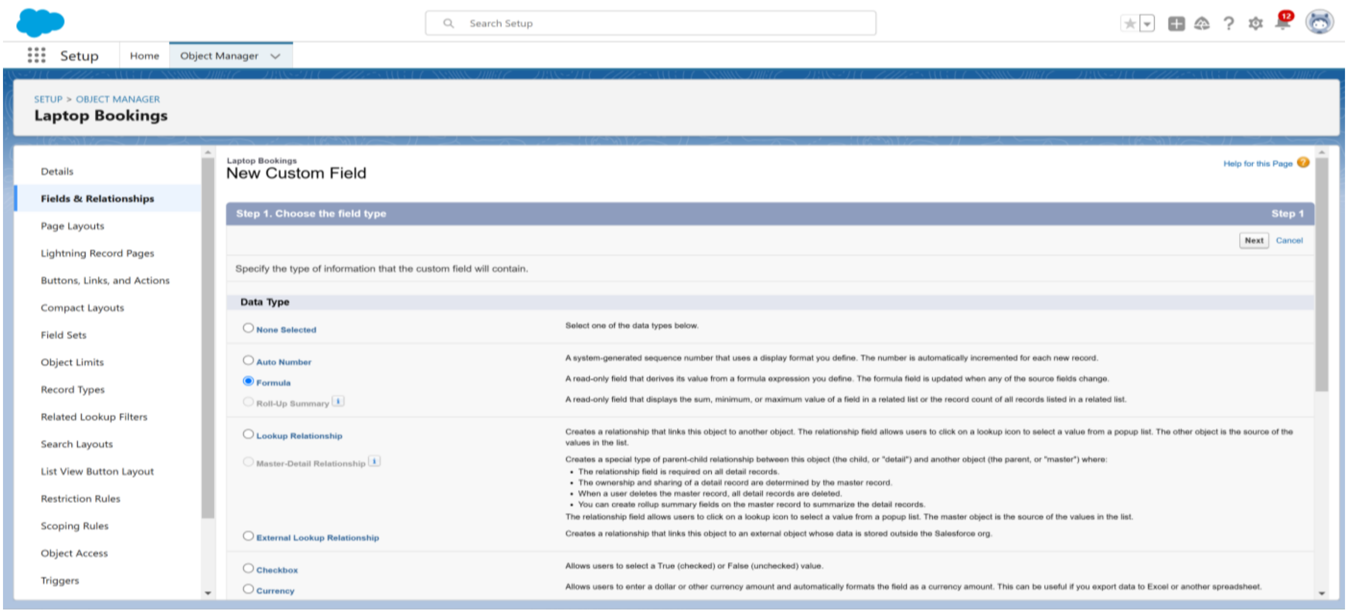


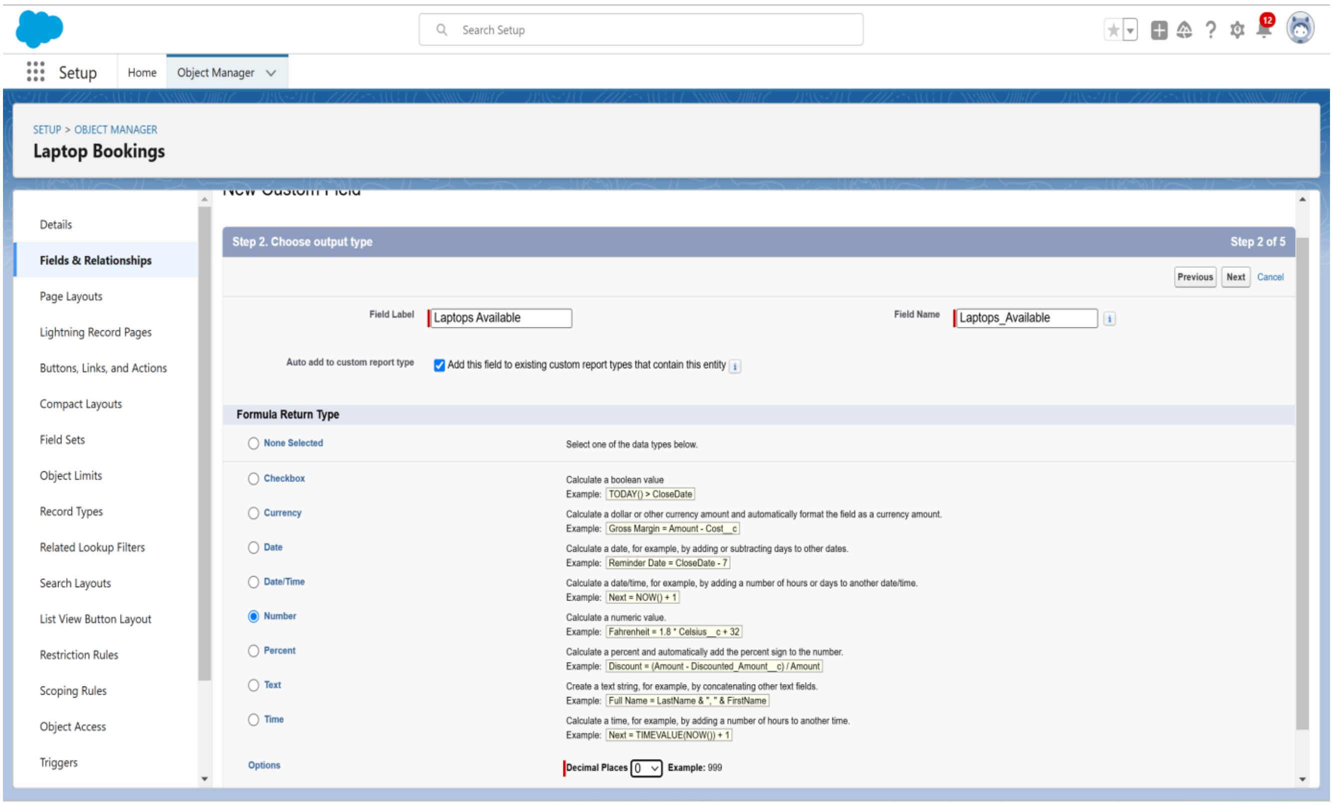


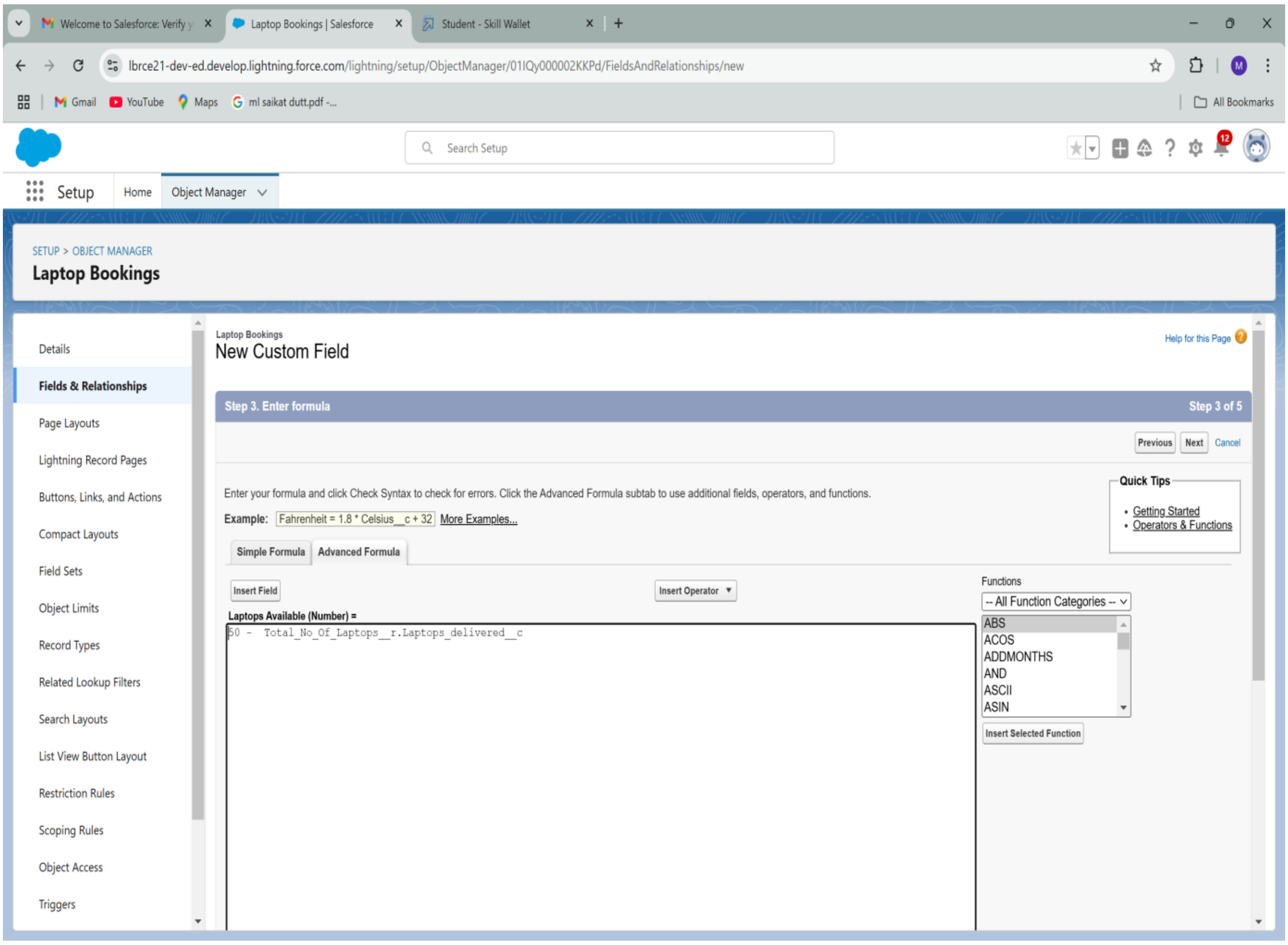
To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Laptop Booking) in the search bar >> click on the object.
2. Now click on "Fields & Relationships" >> New
3. Select Data type as a "Formula" and Click on Next
4. Fill the Above as following:

- Field Label: Laptops Available
- Field Name : It's gets auto generated
- Select the Formula Return Type as "Number"
- Select the Decimal places as "0" and Click on Next
- Click on the Advanced Formula and Enter the value in formula box " 50 - " and Click on insert field than you will find a pop window under the Laptop Booking select the Total No Of Laptops in the second Column and select the Laptops delivered in the third column and click on insert
- " 50 - Total_no_of_laptops__r.Laptops_delivered__c " and Check Syntax
- Click on Next >> Next >> Save and new

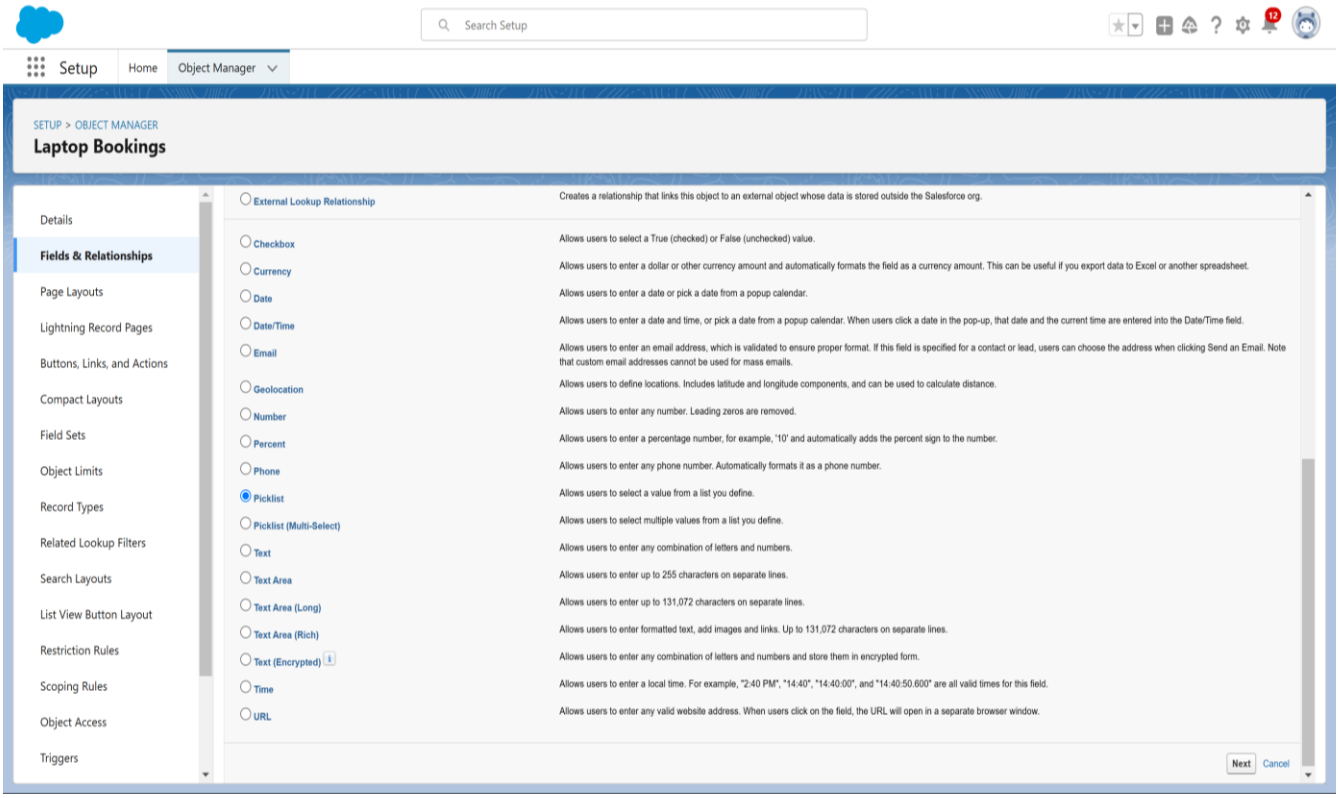


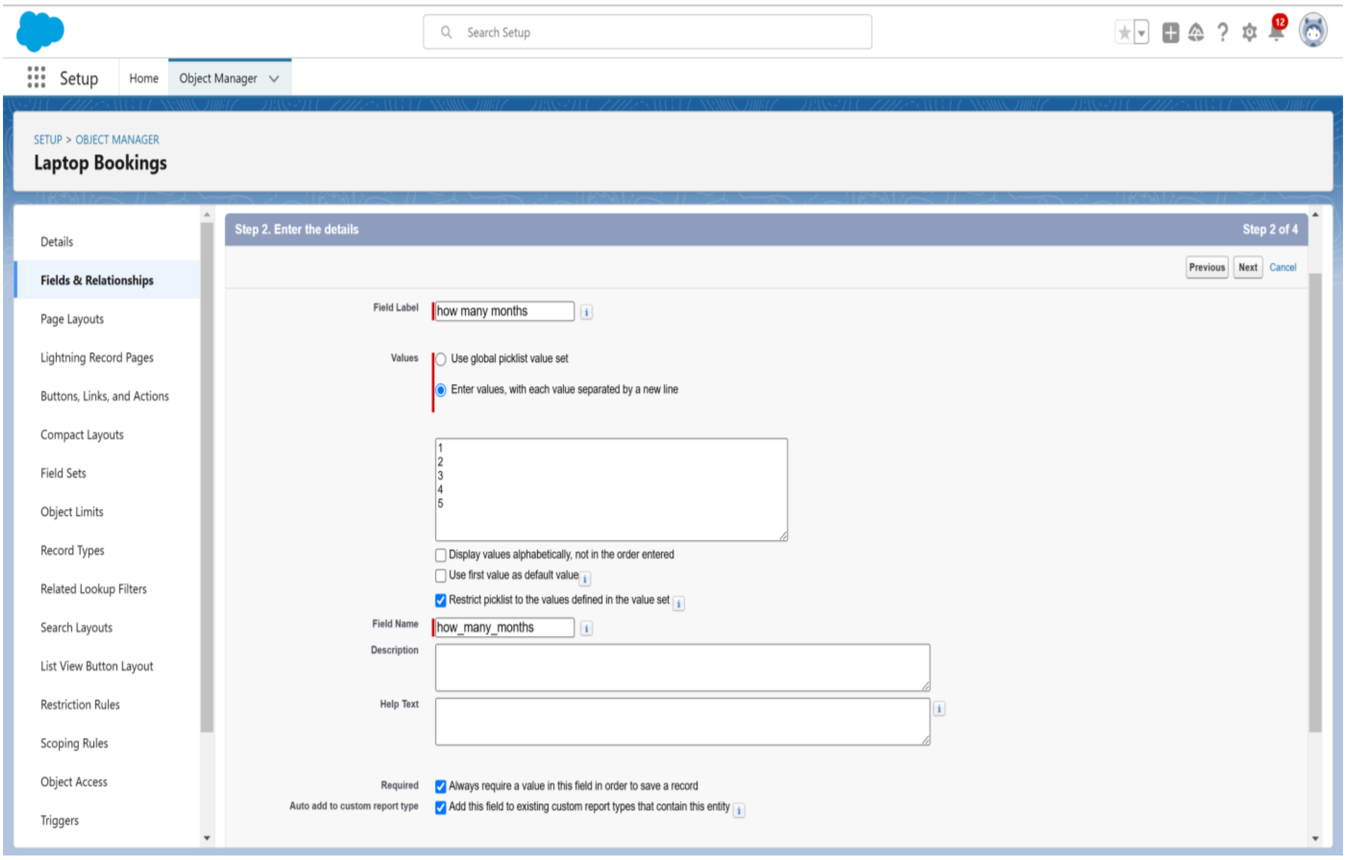

Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Laptop Bookings
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction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


Welcome to Salesforce: Verify
Laptop Bookings | Salesforce
Student - Skill Wallet
lbrce21-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IQy000002KKPd/FieldsAndRelationships/new
Gmail
YouTube
Maps
ml saikat dutt.pdf -...
All Bookmarks
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Laptop Bookings
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Triggers
Laptop Bookings
New Custom Field
Help for this Page
Step 3. Enter formula
Step 3 of 5
Previous
Next
Cancel
Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.
Example: Fahrenheit = 1.8 * Celsius__c + 32 More Examples...
Quick Tips
Getting Started
Operators & Functions
Simple Formula
Advanced Formula
Insert Field
Insert Operator
Functions
-- All Function Categories --
ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN
Insert Selected Function
Laptops Available (Number) =
50 - Total_No_Of_Laptops__r.Laptops_delivered__c

To create fields in an object:

1.Go to setup >> click on Object Manager >> type object name(Laptop Booking) in the 2.search bar >> click on the object.
3.Now click on “Fields & Relationships” >>New
4.Select Data Type as a “picklist” and Label: how many months
5. Picklist values are 1.2.3.4.5
6. Click and save it.

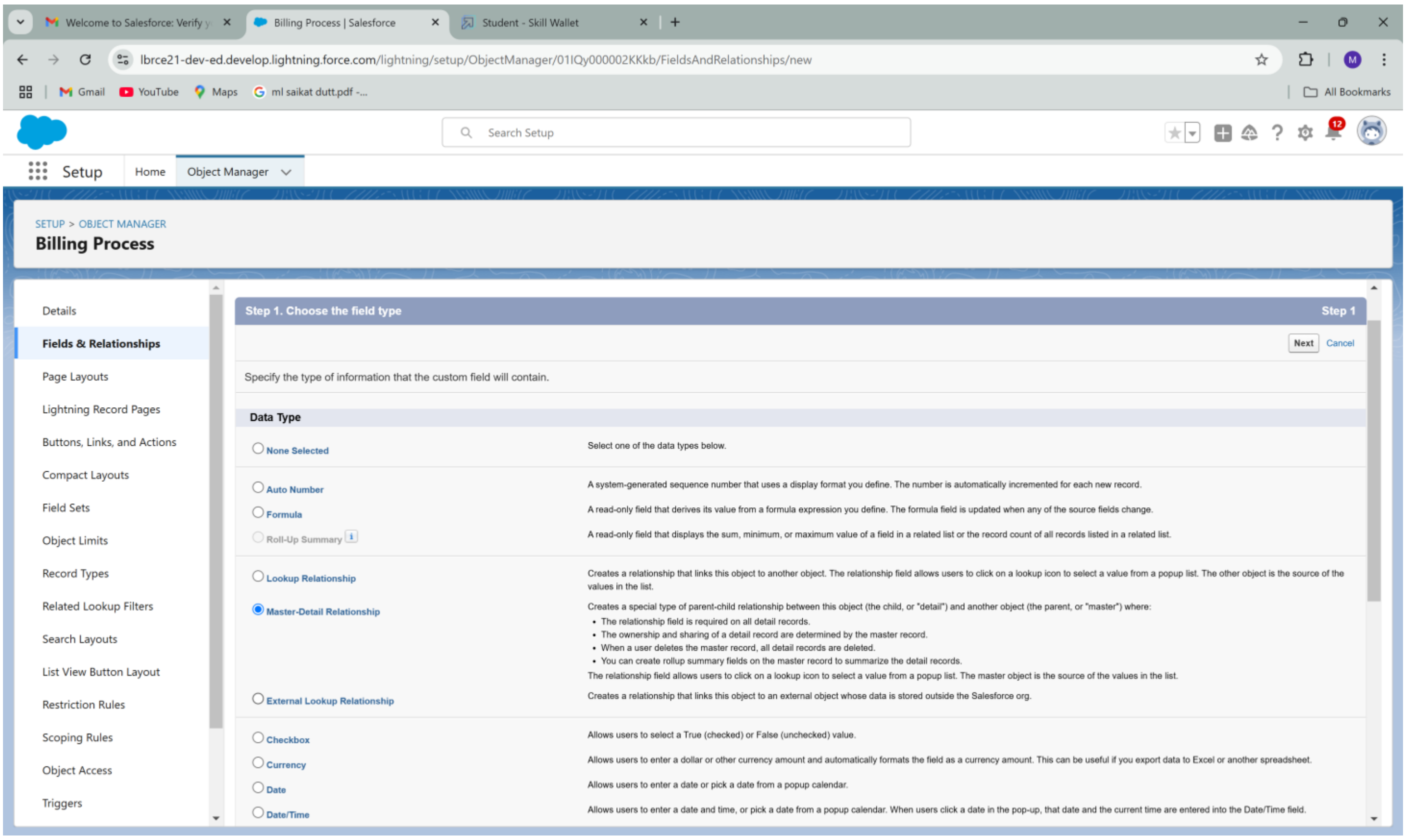




Creation of Fields & Relationship for Billing Process Object

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

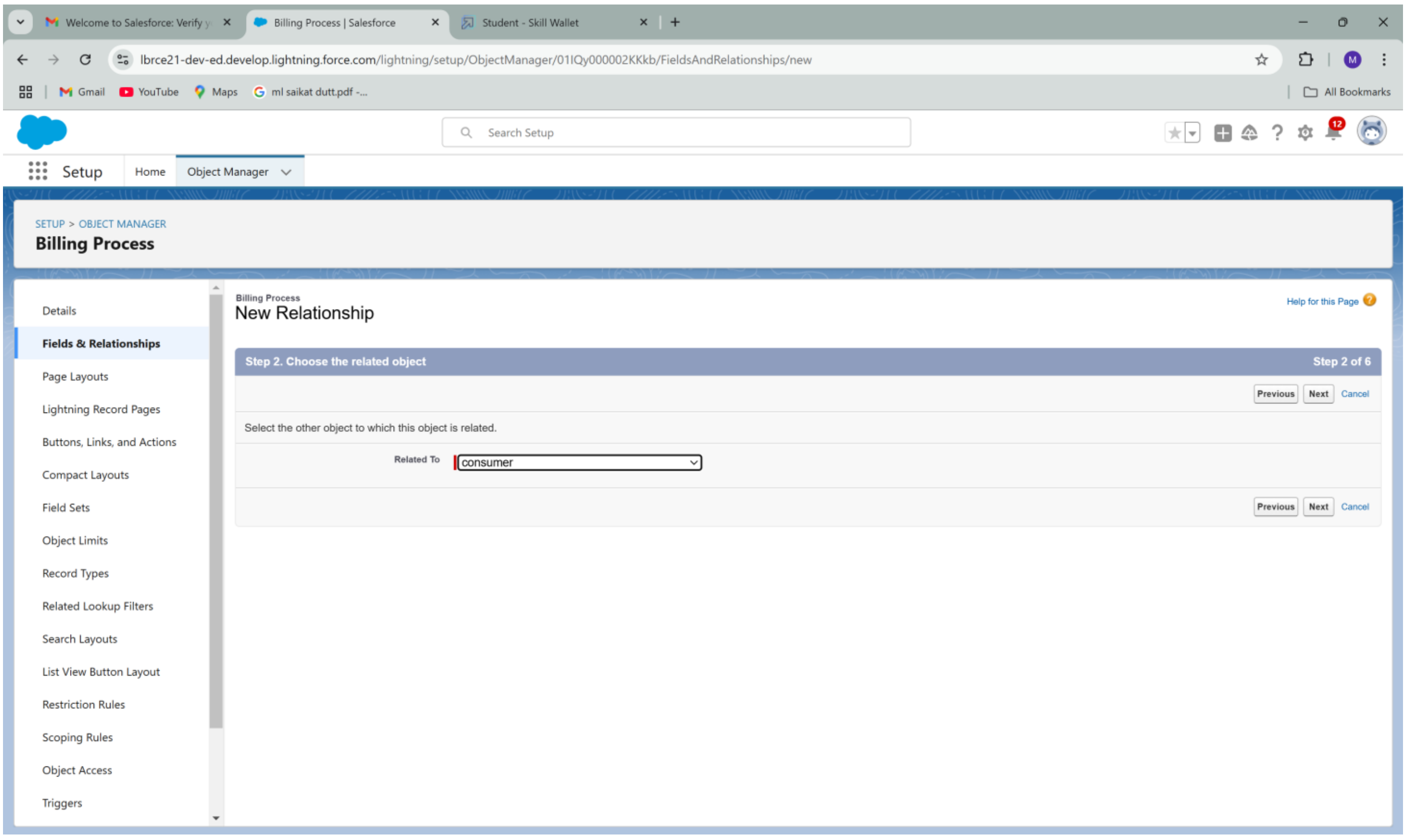


Fill the Above as following:

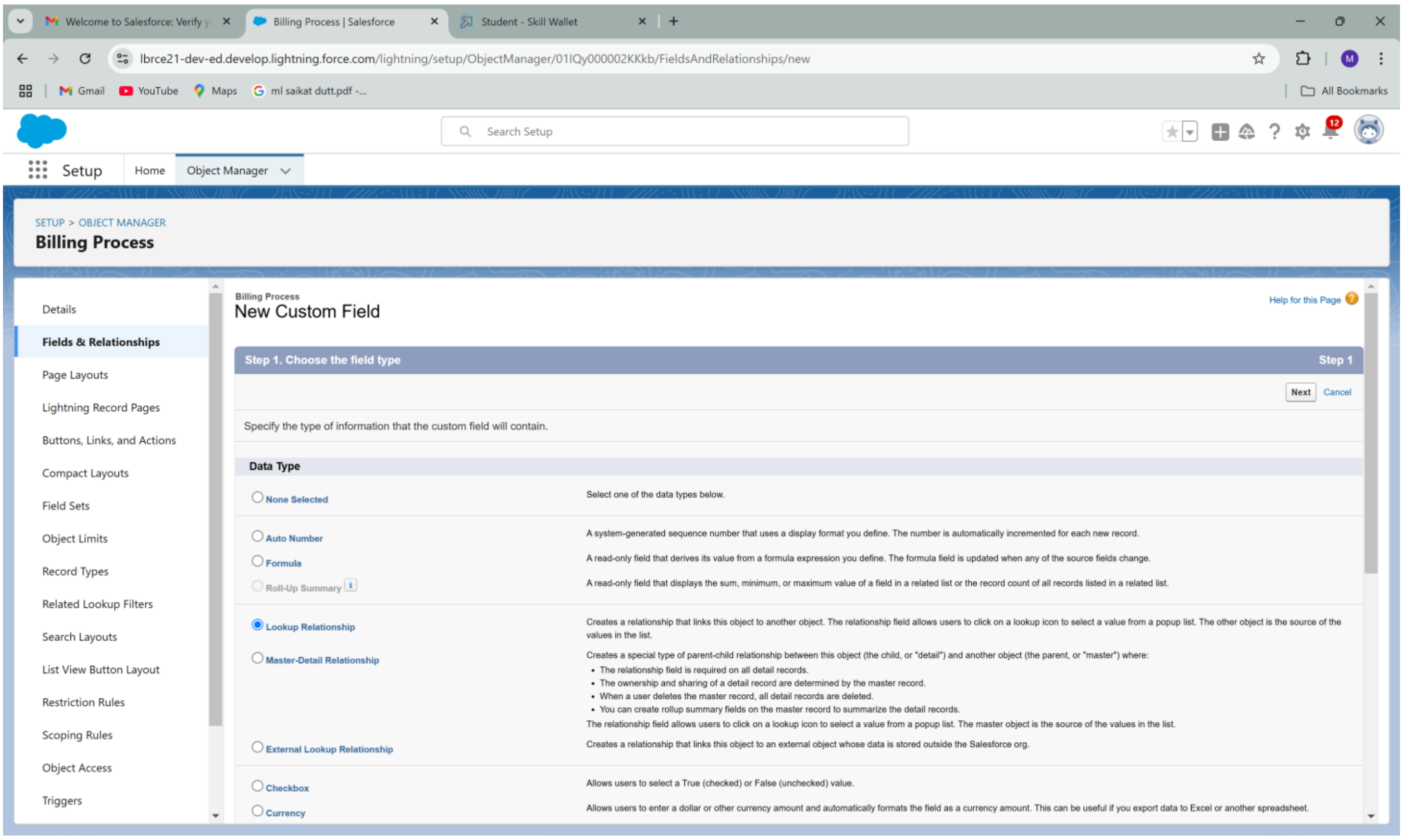
- Change the Field Label: Name
- Field Name :It’s gets auto generated
- Click on Next >> Next >> Save and new.

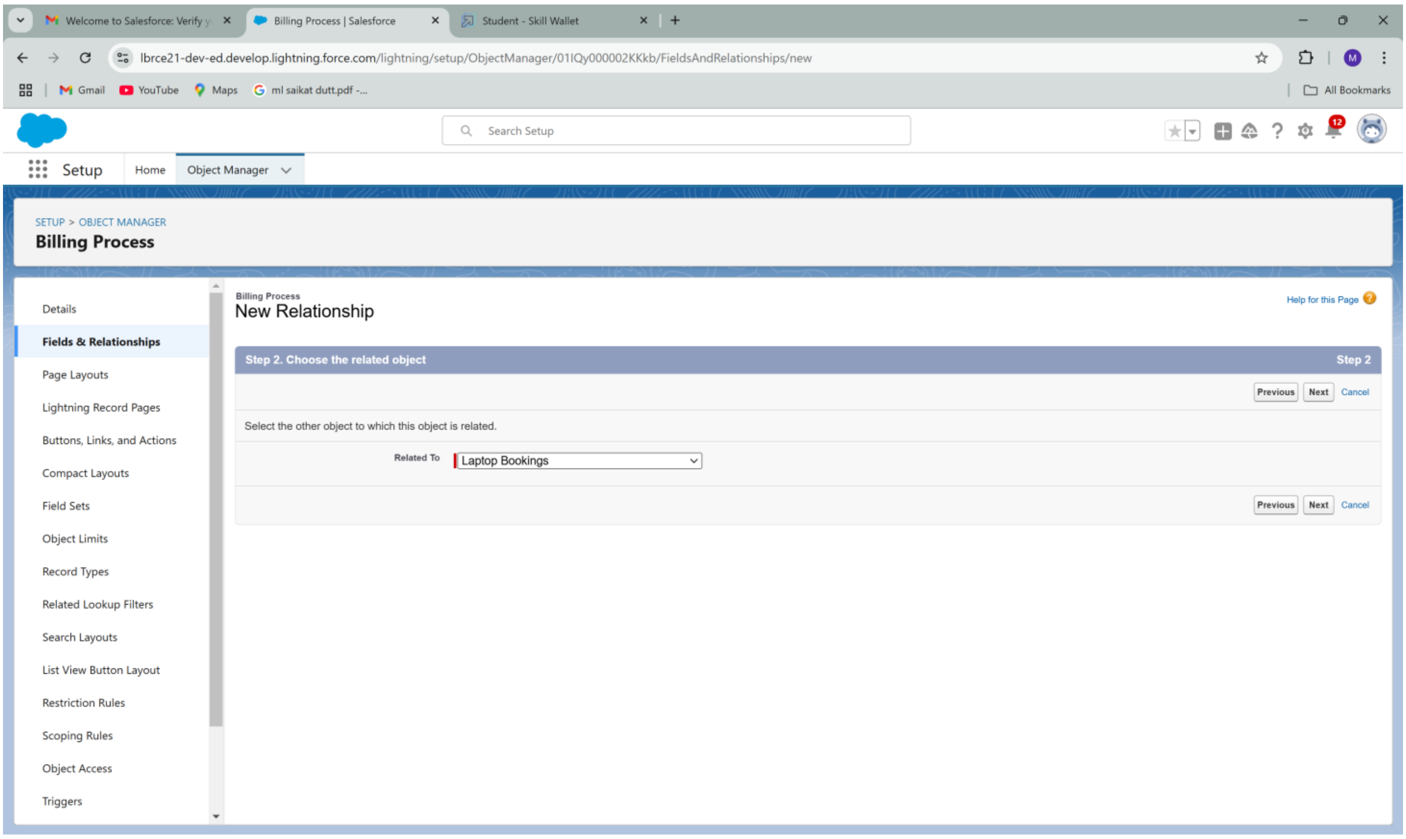
2. To create another fields & relationship to an object:

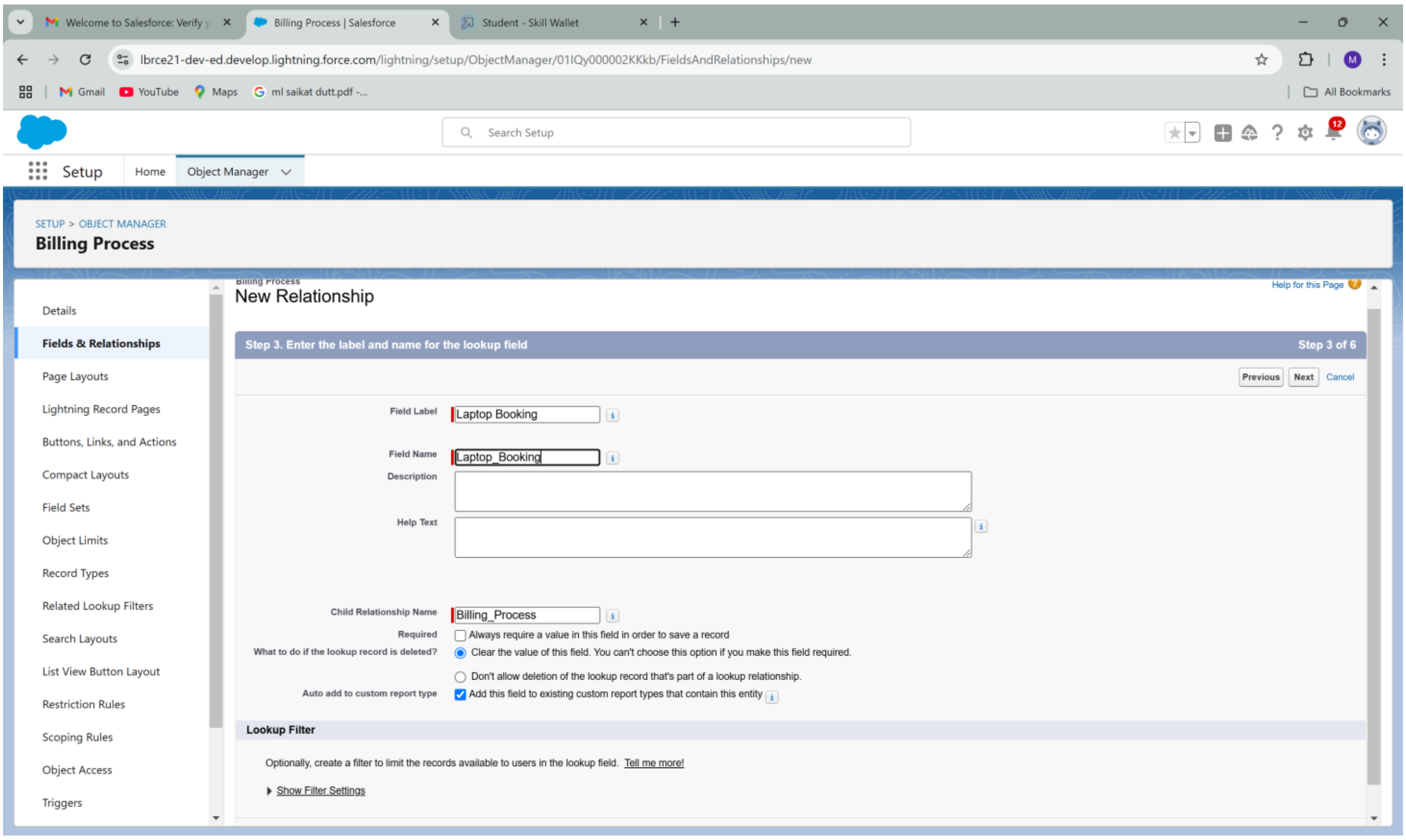
1. Go to setup >> click on Object Manager >> type object name(Billing Process) in the search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data Type as a “Lookup Relationship”
4. Click on Next
5. Click on the Related to drop down and Select the Laptop Booking object and click on Next

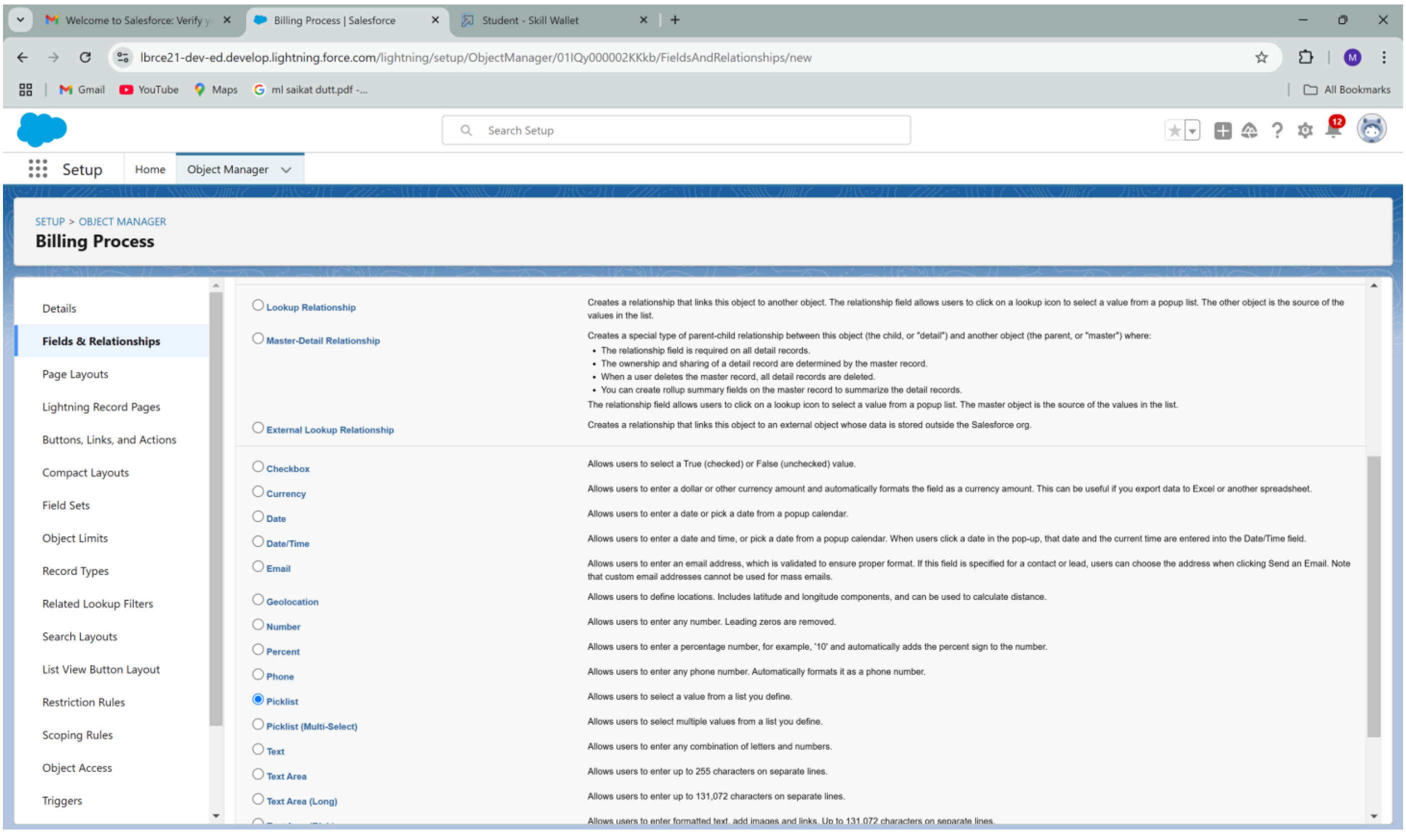


Creating the field in Total Laptops object

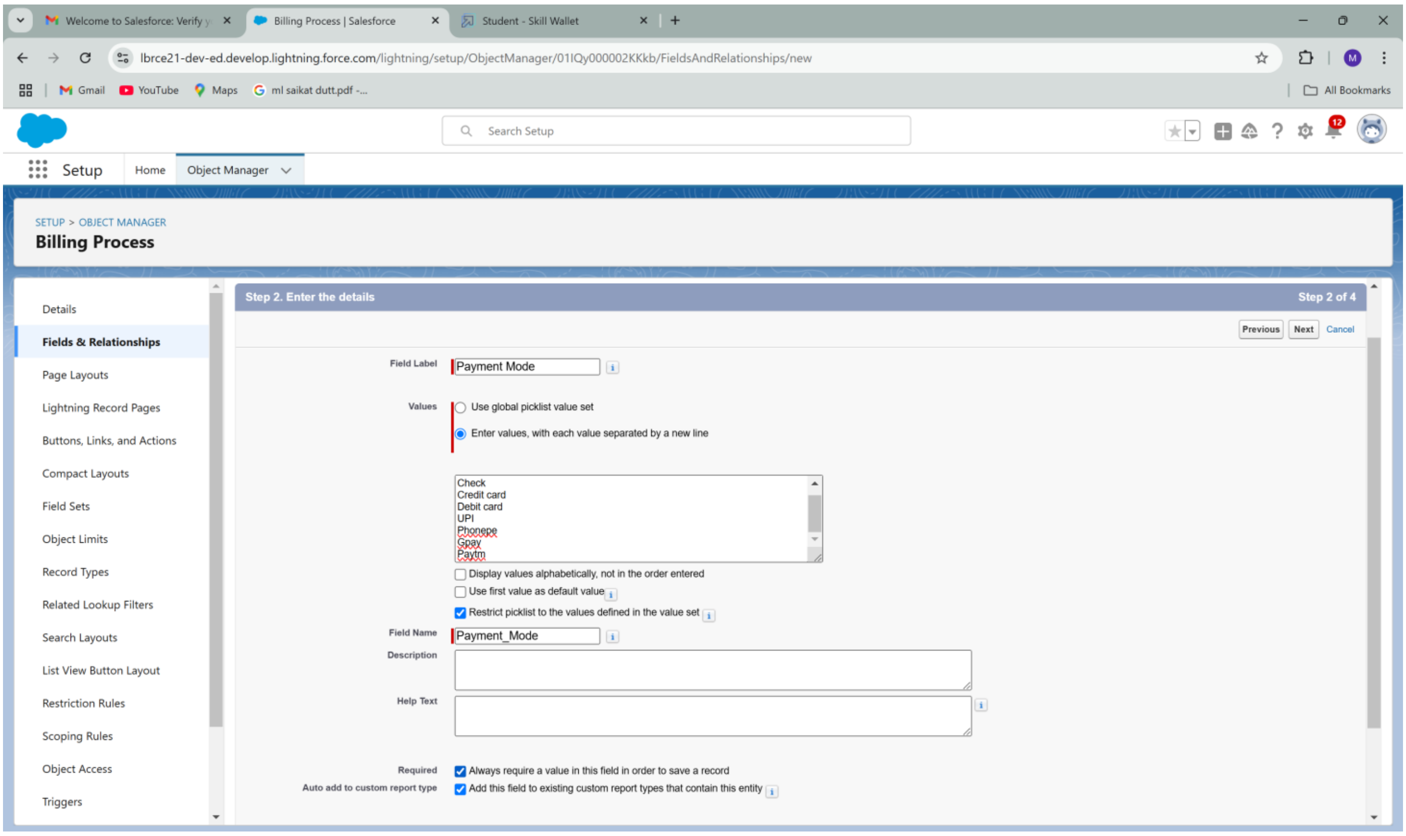



Welcome to Salesforce: Verify
Billing Process | Salesforce
Student - Skill Wallet
lbrce21-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IQy000002KKkb/FieldsAndRelationships/new
Gmail
YouTube
Maps
ml saikat dutt.pdf -...
All Bookmarks
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Billing Process
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Triggers
Billing Process
New Relationship
Help for this Page
Step 2. Choose the related object
Step 2
Previous
Next
Cancel
Select the other object to which this object is related.
Related To
Laptop Bookings

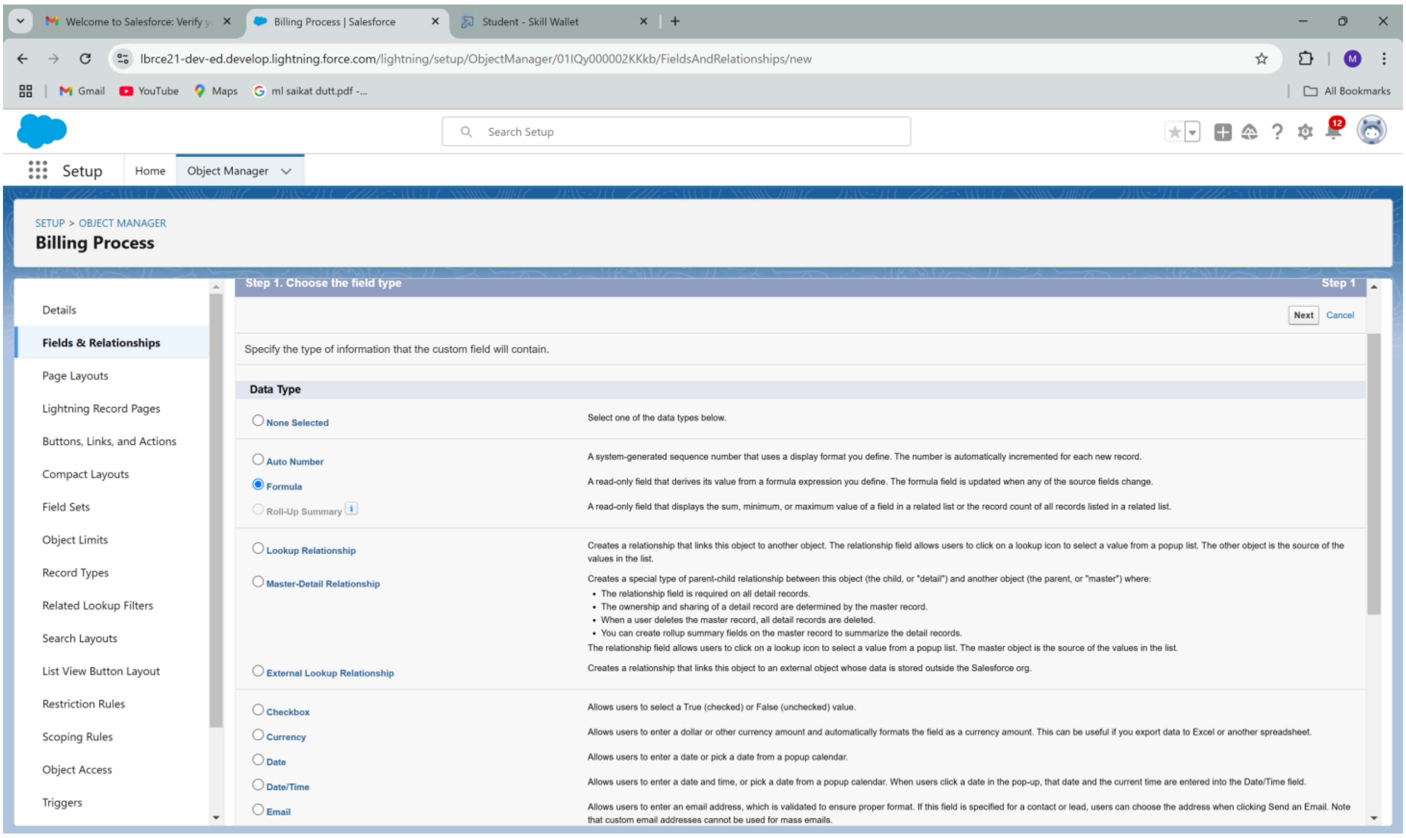

Welcome to Salesforce: Verify
Billing Process | Salesforce
Student - Skill Wallet
lbrce21-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IQy000002KKkb/FieldsAndRelationships/new
Gmail
YouTube
Maps
ml saikat dutt.pdf -...
All Bookmarks
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Billing Process
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Triggers
New Relationship
Help for this Page
Step 3. Enter the label and name for the lookup field
Step 3 of 6
Previous
Next
Cancel
Field Label
Laptop Booking
Field Name
Laptop_Booking
Description
Help Text
Child Relationship Name
Billing_Process
Required
Always require a value in this field in order to save a record
What to do if the lookup record is deleted?
Clear the value of this field. You can't choose this option if you make this field required.
Don't allow deletion of the lookup record that's part of a lookup relationship.
Auto add to custom report type
Add this field to existing custom report types that contain this entity
Lookup Filter
Optionally, create a filter to limit the records available to users in the lookup field. Tell me more!
Show Filter Settings

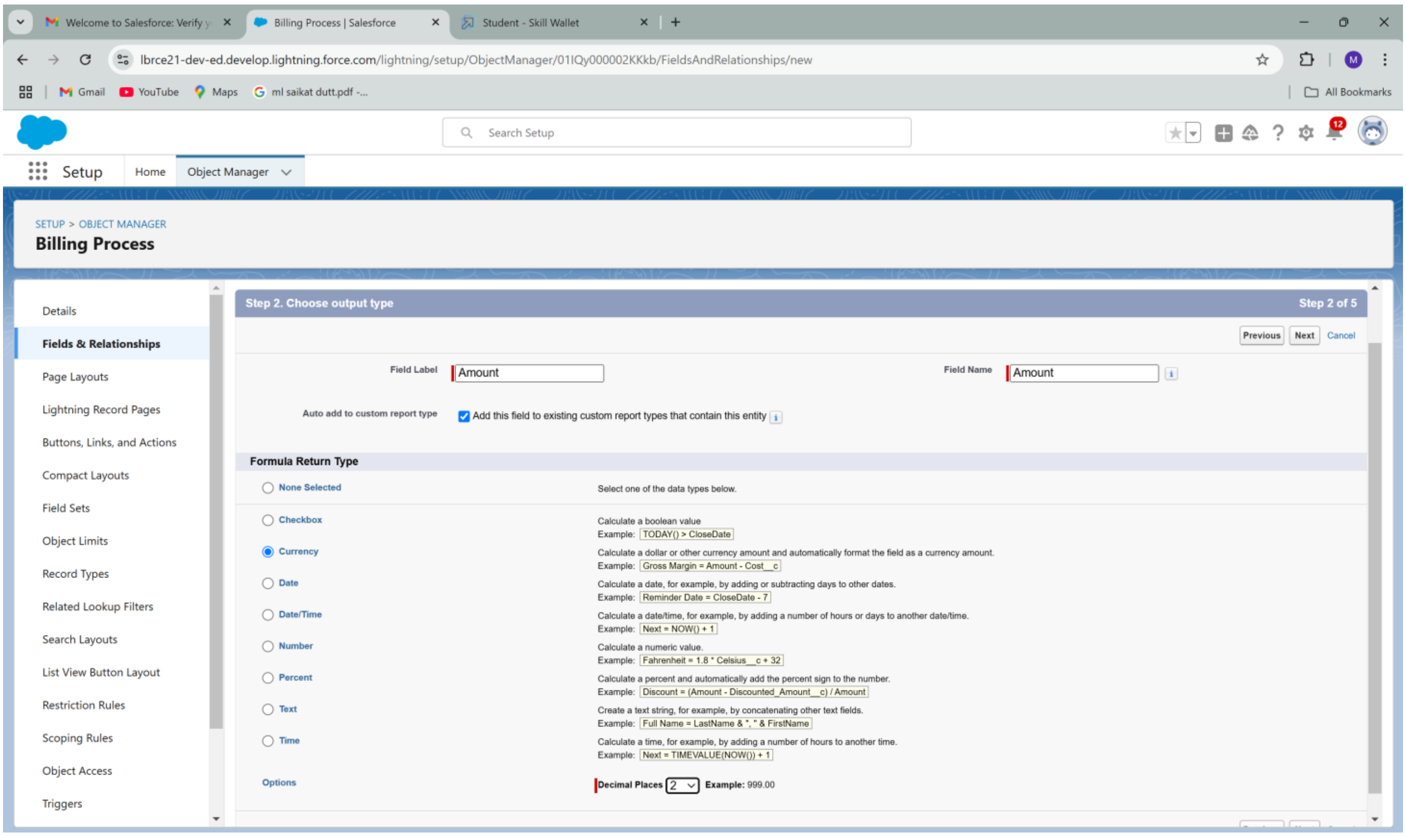


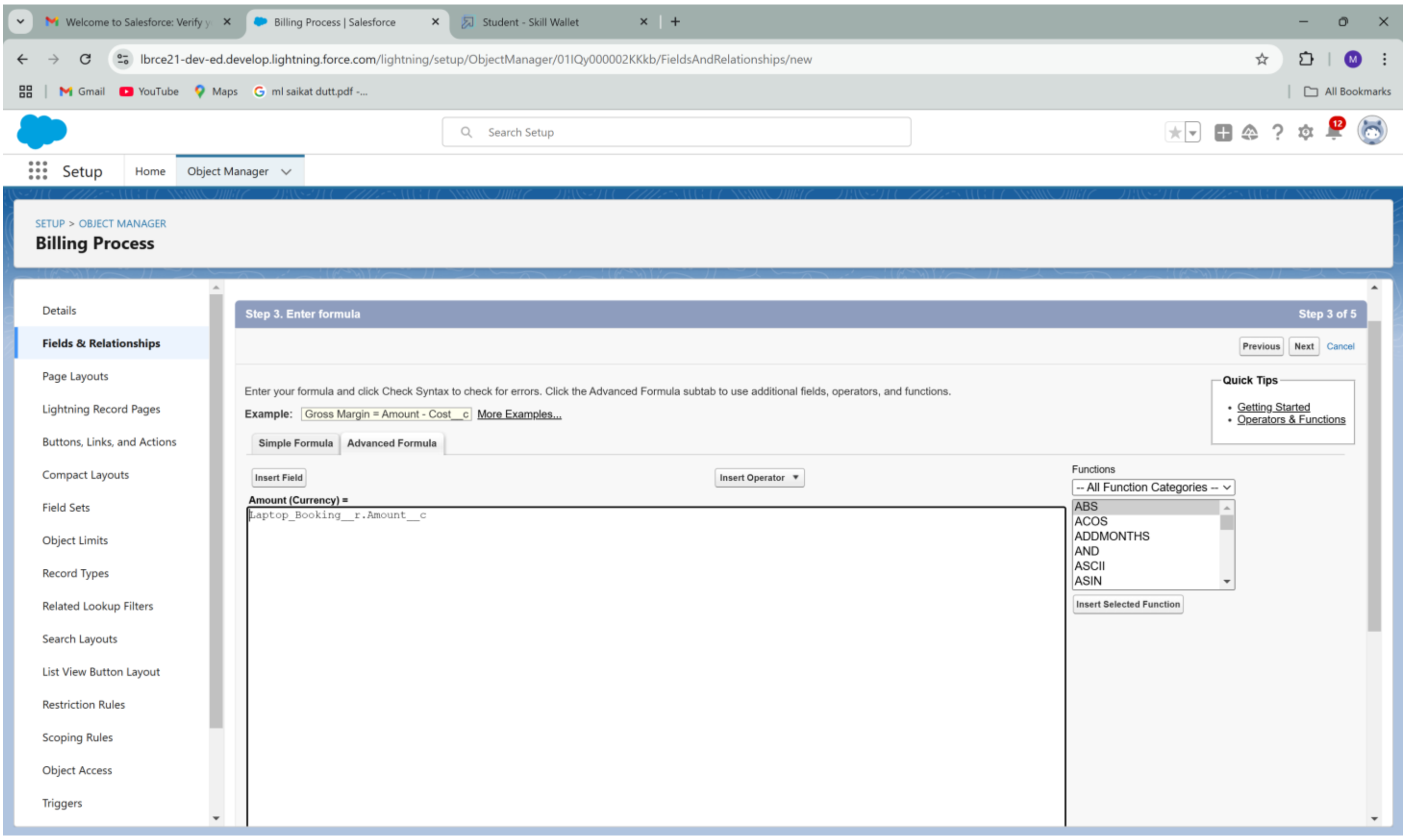
Welcome to Salesforce: Verify y
Billing Process | Salesforce
Student - Skill Wallet
lbrce21-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IQy000002KKkb/FieldsAndRelationships/new
Gmail
YouTube
Maps
ml saikat dutt.pdf -...
All Bookmarks
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Billing Process
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Triggers
Lookup Relationship
Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
Master-Detail Relationship
Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
The relationship field is required on all detail records.
The ownership and sharing of a detail record are determined by the master record.
When a user deletes the master record, all detail records are deleted.
You can create rollup summary fields on the master record to summarize the detail records.
The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.
External Lookup Relationship
Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
Checkbox
Allows users to select a True (checked) or False (unchecked) value.
Currency
Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
Date
Allows users to enter a date or pick a date from a popup calendar.
Date/Time
Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
Email
Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
Geolocation
Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
Number
Allows users to enter any number. Leading zeros are removed.
Percent
Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
Phone
Allows users to enter any phone number. Automatically formats it as a phone number.
Picklist
Allows users to select a value from a list you define.
Picklist (Multi-Select)
Allows users to select multiple values from a list you define.
Text
Allows users to enter any combination of letters and numbers.
Text Area
Allows users to enter up to 255 characters on separate lines.
Text Area (Long)
Allows users to enter up to 131,072 characters on separate lines.

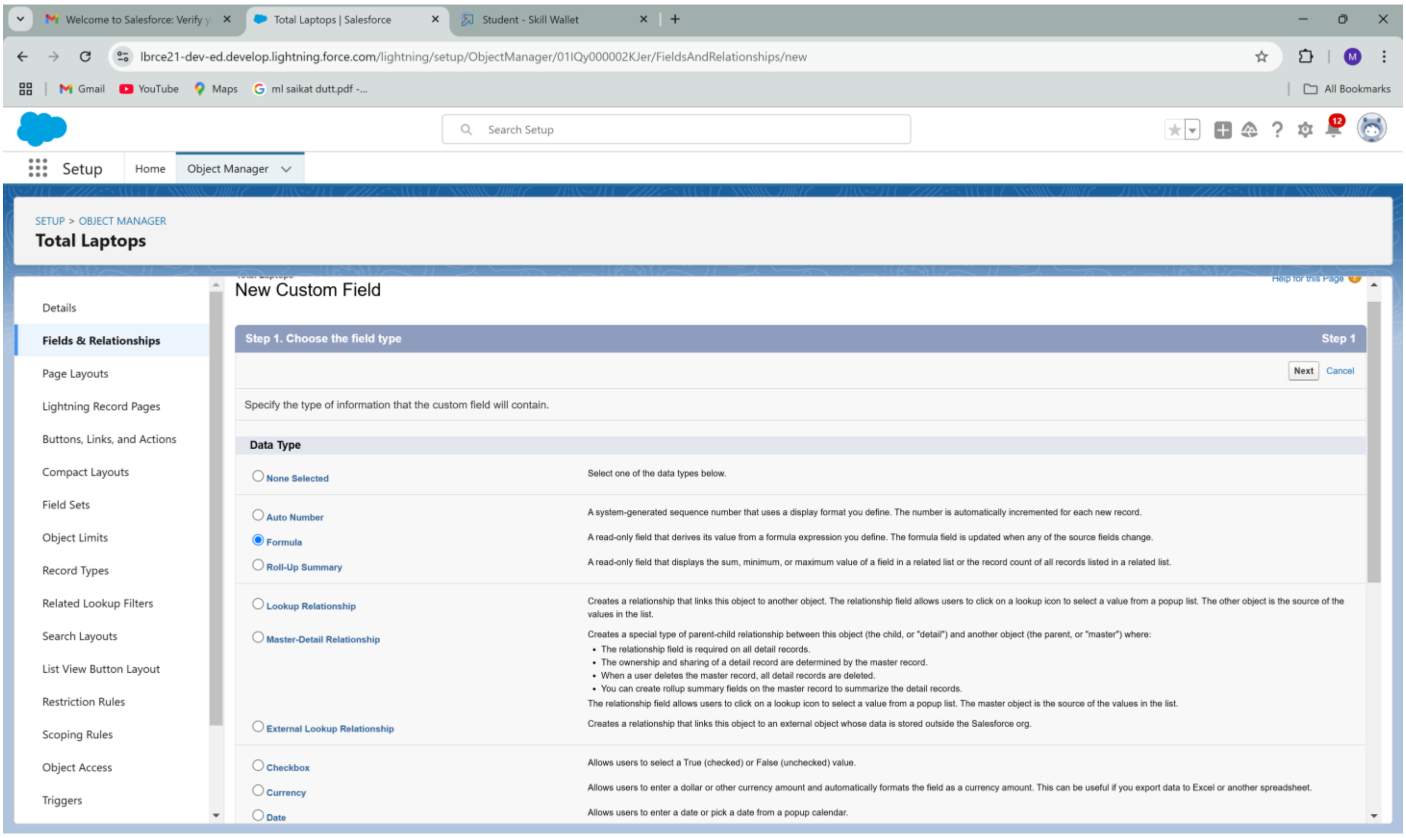


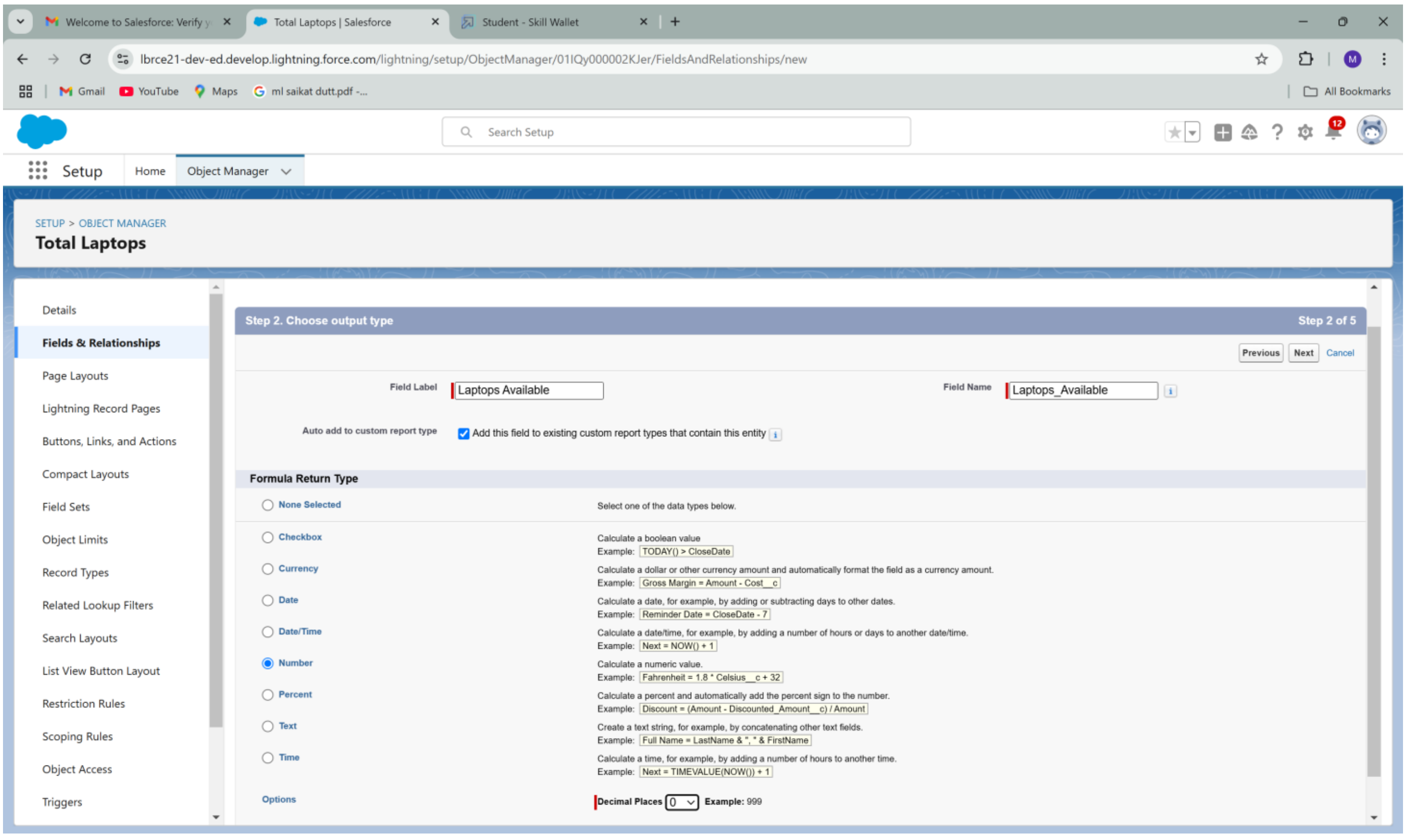
Welcome to Salesforce: Verify y
Billing Process | Salesforce
Student - Skill Wallet
lbrce21-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IQy000002KKkb/FieldsAndRelationships/new
Gmail
YouTube
Maps
ml saikat dutt.pdf -...
All Bookmarks
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Billing Process
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Triggers
Step 2. Enter the details
Step 2 of 4
Previous
Next
Cancel
Field Label
Payment Mode
Values
Use global picklist value set
Enter values, with each value separated by a new line
Check
Credit card
Debit card
UPI
Phonepe
Gpay
Paytm
Display values alphabetically, not in the order entered
Use first value as default value
Restrict picklist to the values defined in the value set
Field Name
Payment_Mode
Description
Help Text
Required
Always require a value in this field in order to save a record
Auto add to custom report type
Add this field to existing custom report types that contain this entity

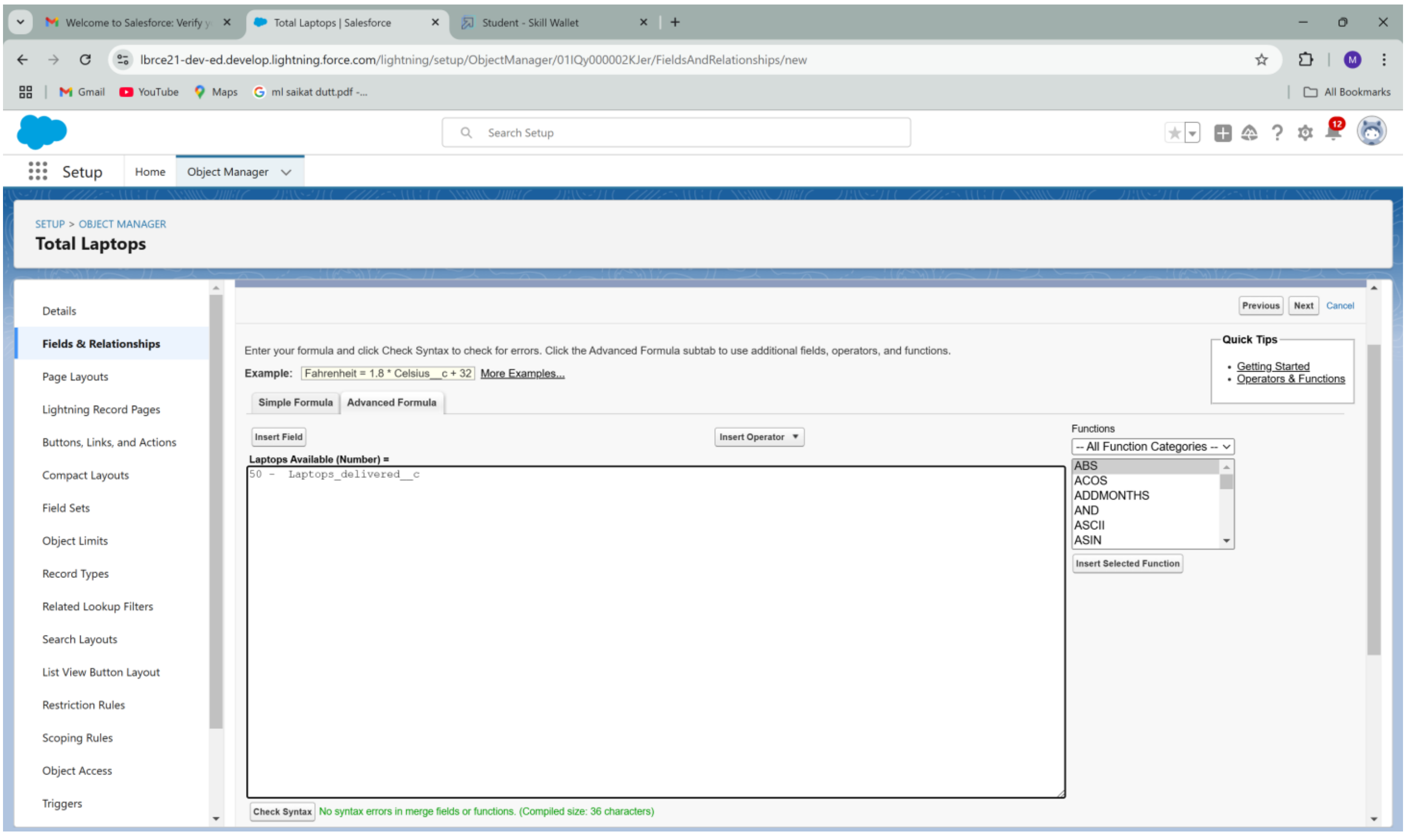

Welcome to Salesforce: Verify y
Billing Process | Salesforce
Student - Skill Wallet
lbrce21-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IQy000002KKkb/FieldsAndRelationships/new
Gmail
YouTube
Maps
ml saikat dutt.pdf -...
All Bookmarks
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Billing Process
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Triggers
Step 1. Choose the field type
Step 1
Next
Cancel
Specify the type of information that the custom field will contain.
Data Type
None Selected
Select one of the data types below.
Auto Number
A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
Formula
A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
Roll-Up Summary
A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
Lookup Relationship
Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
Master-Detail Relationship
Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
The relationship field is required on all detail records.
The ownership and sharing of a detail record are determined by the master record.
When a user deletes the master record, all detail records are deleted.
You can create rollup summary fields on the master record to summarize the detail records.
The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.
External Lookup Relationship
Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
Checkbox
Allows users to select a True (checked) or False (unchecked) value.
Currency
Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
Date
Allows users to enter a date or pick a date from a popup calendar.
Date/Time
Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
Email
Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.


Welcome to Salesforce: Verify y
Billing Process | Salesforce
Student - Skill Wallet
lbrce21-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IQy000002KKkb/FieldsAndRelationships/new
Gmail
YouTube
Maps
ml saikat dutt.pdf -...
All Bookmarks
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Billing Process
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Triggers
Step 2. Choose output type
Step 2 of 5
Previous
Next
Cancel
Field Label
Amount
Field Name
Amount
Auto add to custom report type
Add this field to existing custom report types that contain this entity
Formula Return Type
None Selected
Select one of the data types below.
Checkbox
Calculate a boolean value
Example: TODAY() > CloseDate
Currency
Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: Gross Margin = Amount - Cost__c
Date
Calculate a date, for example, by adding or subtracting days to other dates.
Example: Reminder Date = CloseDate - 7
Date/Time
Calculate a date/time, for example, by adding a number of hours or days to another date/time.
Example: Next = NOW() + 1
Number
Calculate a numeric value.
Example: Fahrenheit = 1.8 * Celsius__c + 32
Percent
Calculate a percent and automatically add the percent sign to the number.
Example: Discount = (Amount - Discounted_Amount__c) / Amount
Text
Create a text string, for example, by concatenating other text fields.
Example: Full Name = LastName & ", " & FirstName
Time
Calculate a time, for example, by adding a number of hours to another time.
Example: Next = TIMEVALUE(NOW()) + 1
Options
Decimal Places
2
Example: 999.00


Welcome to Salesforce: Verify y
Billing Process | Salesforce
Student - Skill Wallet
lbrce21-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IQy000002KKkb/FieldsAndRelationships/new
Gmail
YouTube
Maps
ml saikat dutt.pdf -...
All Bookmarks
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Billing Process
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Triggers
Step 3. Enter formula
Step 3 of 5
Previous
Next
Cancel
Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.
Example: Gross Margin = Amount - Cost__c More Examples...
Quick Tips
Getting Started
Operators & Functions
Simple Formula
Advanced Formula
Insert Field
Insert Operator
Functions
-- All Function Categories --
Amount (Currency) =
Laptop_Booking__r.Amount__c
ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN
Insert Selected Function


Welcome to Salesforce: Verify y
Total Laptops | Salesforce
Student - Skill Wallet
lbrce21-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IQy000002KJer/FieldsAndRelationships/new
Gmail
YouTube
Maps
ml saikat dutt.pdf -...
All Bookmarks
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Total Laptops
New Custom Field
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Triggers
Step 1. Choose the field type
Step 1
Next
Cancel
Specify the type of information that the custom field will contain.
Data Type
None Selected
Select one of the data types below.
Auto Number
A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
Formula
A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
Roll-Up Summary
A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
Lookup Relationship
Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
Master-Detail Relationship
Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
The relationship field is required on all detail records.
The ownership and sharing of a detail record are determined by the master record.
When a user deletes the master record, all detail records are deleted.
You can create rollup summary fields on the master record to summarize the detail records.
The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.
External Lookup Relationship
Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
Checkbox
Allows users to select a True (checked) or False (unchecked) value.
Currency
Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
Date
Allows users to enter a date or pick a date from a popup calendar.

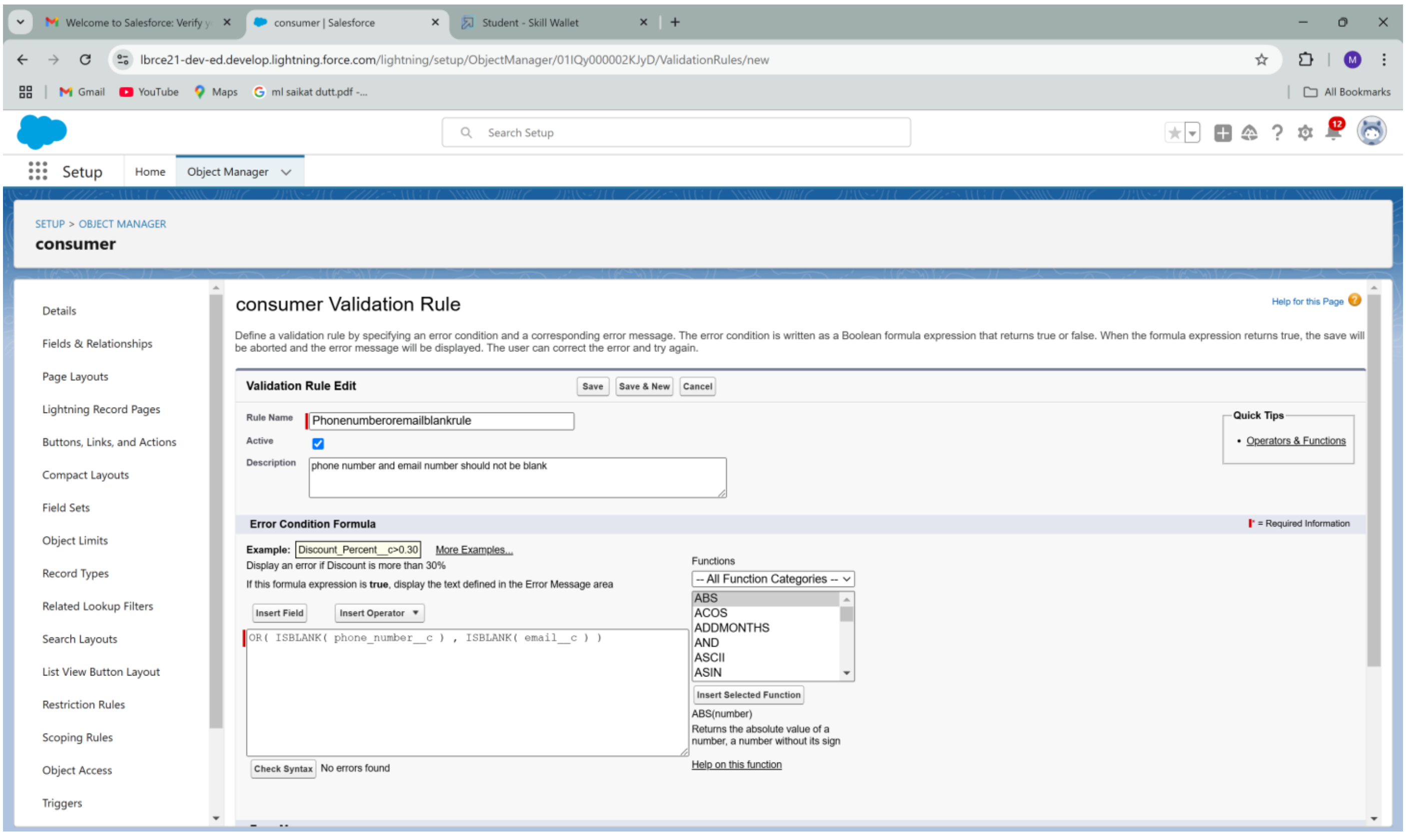

Welcome to Salesforce: Verify y
Total Laptops | Salesforce
Student - Skill Wallet
lbrce21-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IQy000002KJer/FieldsAndRelationships/new
Gmail
YouTube
Maps
ml saikat dutt.pdf -...
All Bookmarks
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Total Laptops
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Triggers
Step 2. Choose output type
Step 2 of 5
Previous
Next
Cancel
Field Label
Laptops Available
Field Name
Laptops_Available
Auto add to custom report type
Add this field to existing custom report types that contain this entity
Formula Return Type
None Selected
Select one of the data types below.
Checkbox
Calculate a boolean value
Example: TODAY() > CloseDate
Currency
Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: Gross Margin = Amount - Cost__c
Date
Calculate a date, for example, by adding or subtracting days to other dates.
Example: Reminder Date = CloseDate - 7
Date/Time
Calculate a date/time, for example, by adding a number of hours or days to another date/time.
Example: Next = NOW() + 1
Number
Calculate a numeric value.
Example: Fahrenheit = 1.8 * Celsius__c + 32
Percent
Calculate a percent and automatically add the percent sign to the number.
Example: Discount = (Amount - Discounted_Amount__c) / Amount
Text
Create a text string, for example, by concatenating other text fields.
Example: Full Name = LastName & ", " & FirstName
Time
Calculate a time, for example, by adding a number of hours to another time.
Example: Next = TIMEVALUE(NOW()) + 1
Options
Decimal Places 0
Example: 999


Welcome to Salesforce: Verify y
Total Laptops | Salesforce
Student - Skill Wallet
lbrce21-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IQy000002KJer/FieldsAndRelationships/new
Gmail
YouTube
Maps
ml saikat dutt.pdf -...
All Bookmarks
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
Previous
Next
Cancel
Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.
Example: Fahrenheit = 1.8 * Celsius__c + 32 More Examples...
Quick Tips
Getting Started
Operators & Functions
Simple Formula
Advanced Formula
Insert Field
Insert Operator
Functions
-- All Function Categories --
ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN
Insert Selected Function
Laptops Available (Number) =
50 - Laptops_delivered__c
Check Syntax
No syntax errors in merge fields or functions. (Compiled size: 36 characters)

Creating the validation rule for phone number field in consumer object

Creating the validation rule for phone number field in consumer object

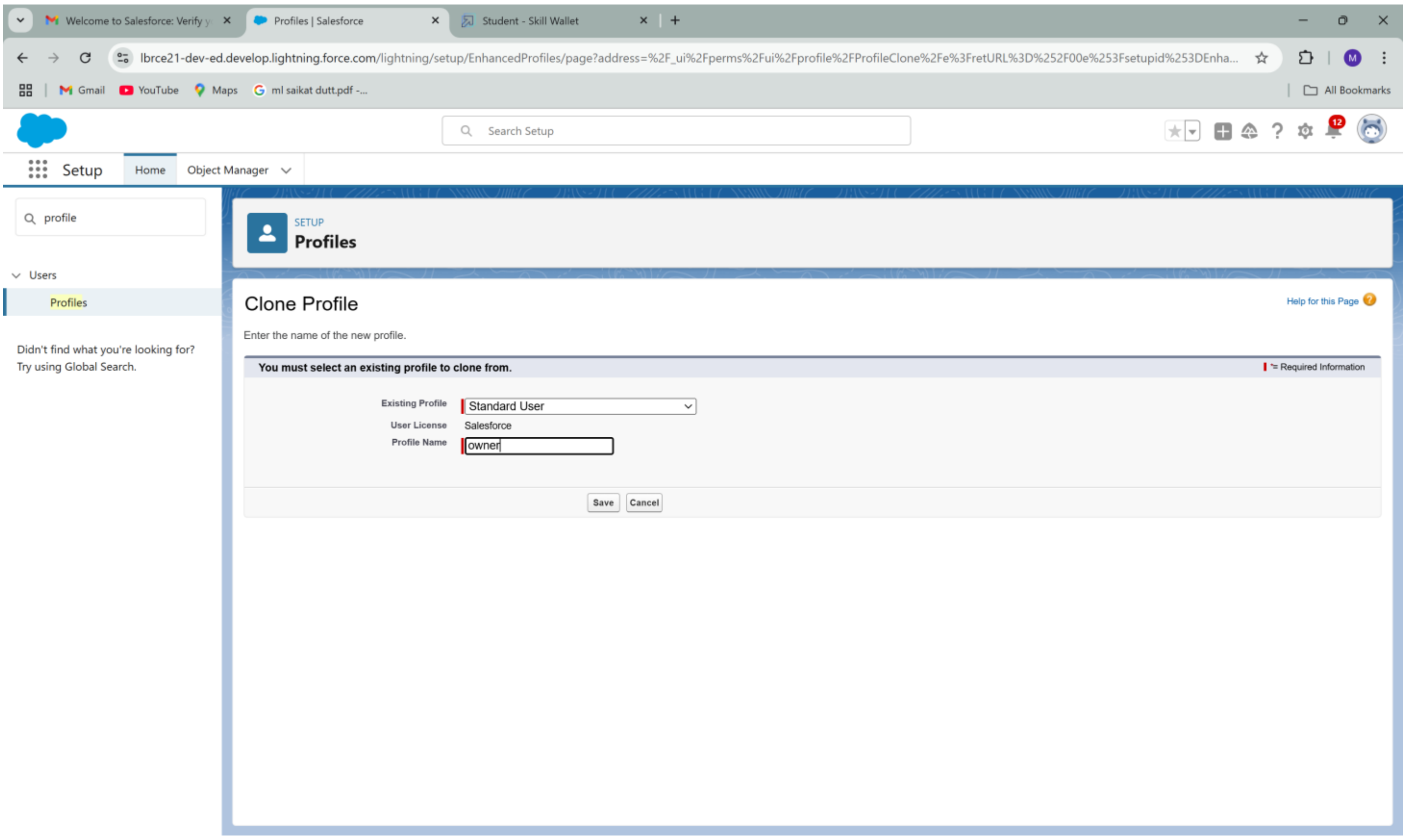
1. Go to the setup page >> click on object manager >> From drop down click edit for consumer object.
2. Click on the validation rule >> click New.
3. Enter the Rule name as “Phonenumberoremailblankrule ”.
4. Enter the description as “phone number and email number should not be blank”.
5. Enter the formula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

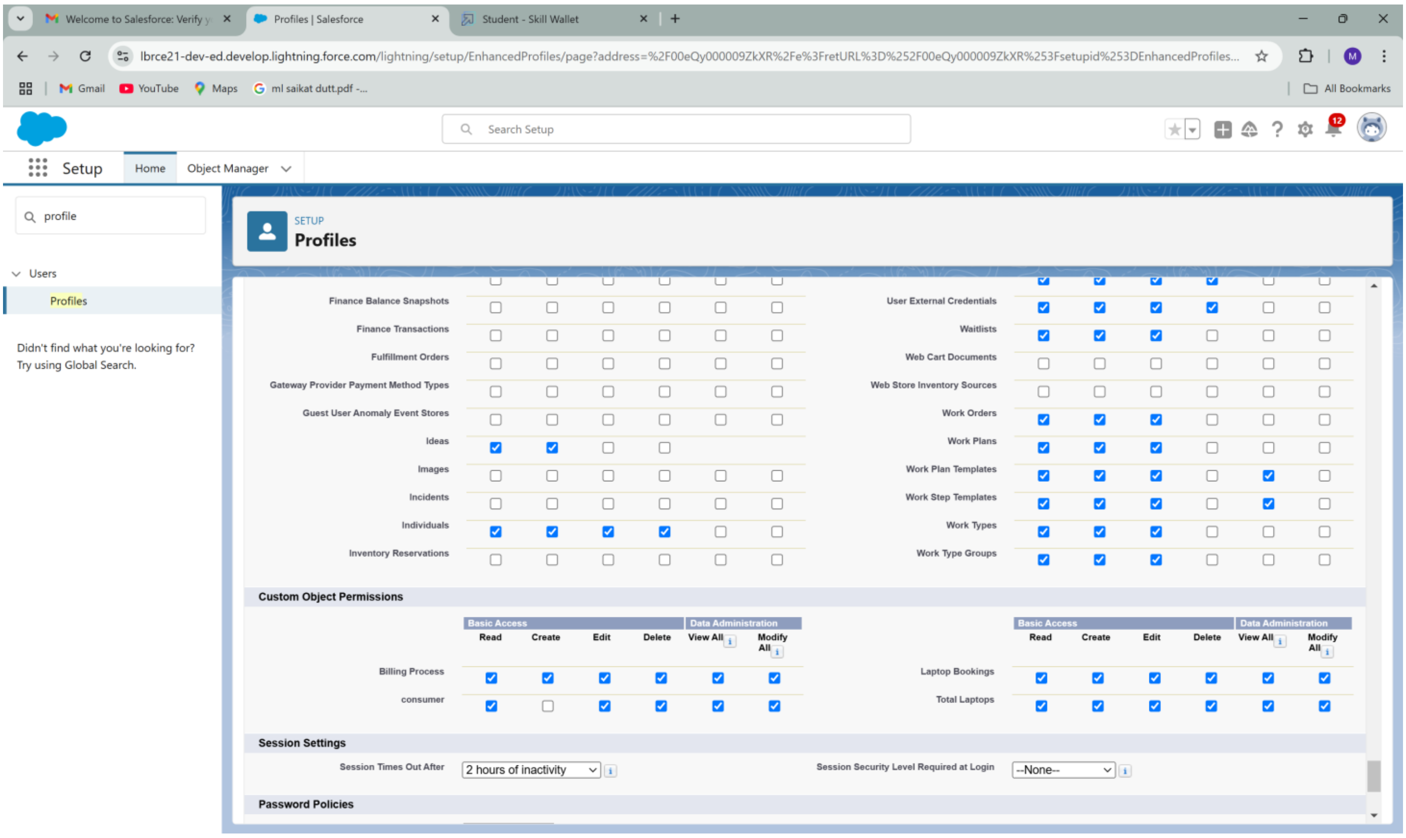


Owner Profile

To create a new profile:

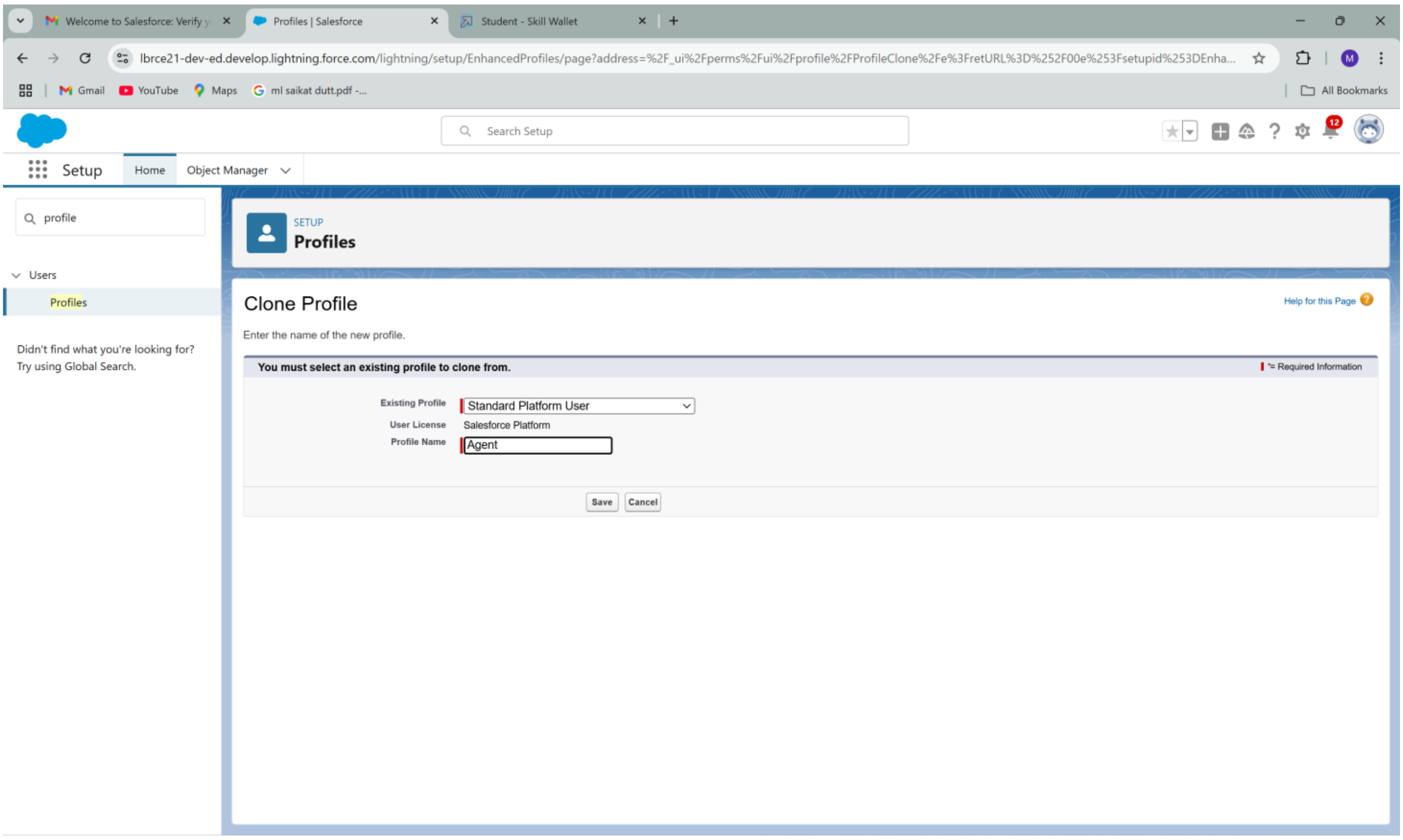
1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Standard User) >> enter profile name (owner) >> Save.
2. Scroll down to Custom Object Permissions and Give access permissions for Total Laptops, consumers , Laptop Booking and Billing Process objects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

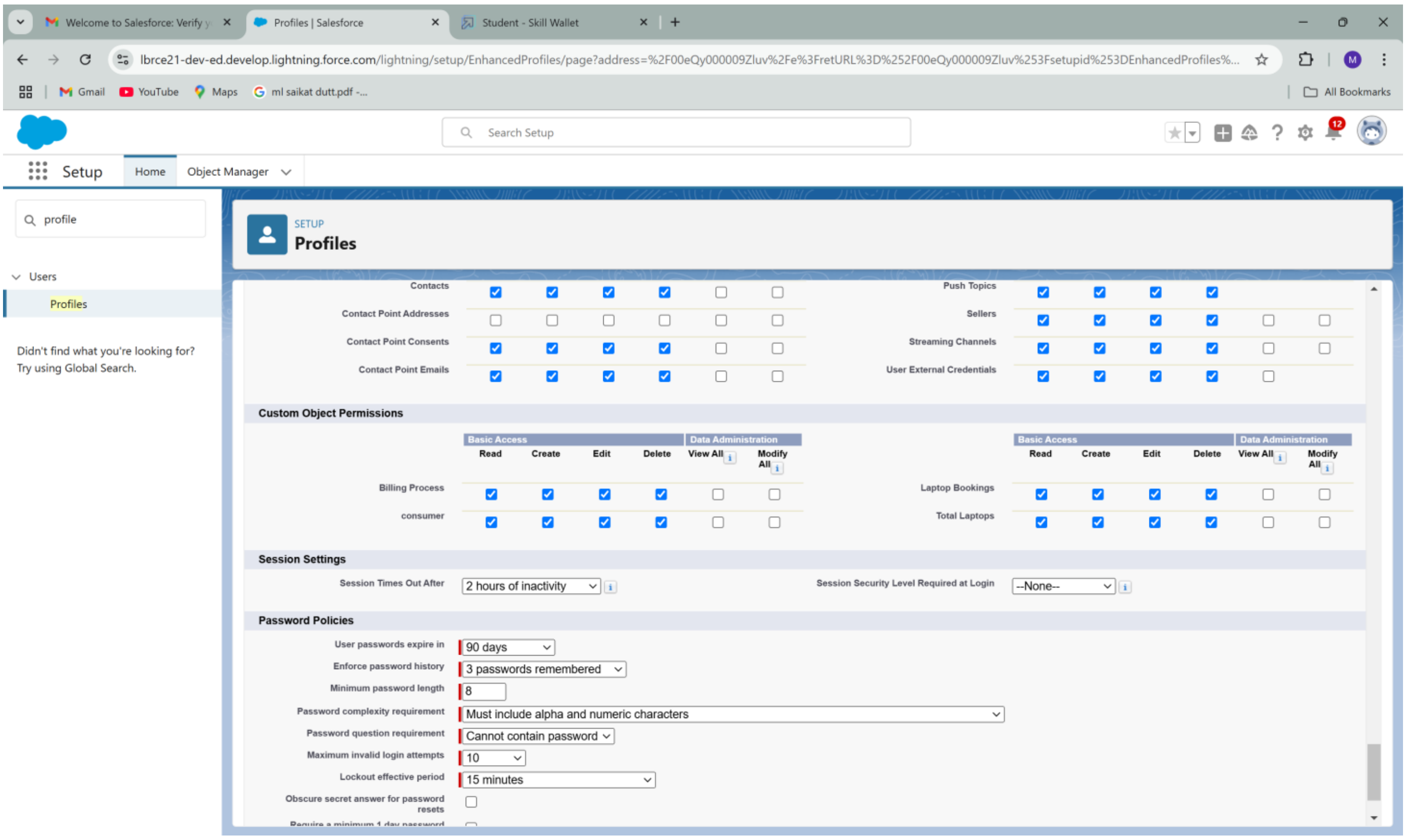

Welcome to Salesforce: Verify y
Profiles | Salesforce
Student - Skill Wallet
lbrce21-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F_ui%2Fperms%2Fui%2Fprofile%2FProfileClone%2Fe%3FretURL%3D%252F00e%253Fsetupid%253DEnha...
Gmail
YouTube
Maps
ml saikat dutt.pdf -...
All Bookmarks
Search Setup
Setup
Home
Object Manager
profile
Users
Profiles
Didn't find what you're looking for?
Try using Global Search.
SETUP
Profiles
Clone Profile
Help for this Page
Enter the name of the new profile.
You must select an existing profile to clone from.
= Required Information
Existing Profile
Standard User
User License
Salesforce
Profile Name
owner
Save
Cancel


Welcome to Salesforce: Verify y
Profiles | Salesforce
Student - Skill Wallet
lbrce21-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
Search Setup
Setup
Home
Object Manager
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
Custom Object Permissions
Basic Access
Data Administration
Read
Create
Edit
Delete
View All
Modify All
Billing Process
consumer
Laptop Bookings
Total Laptops
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.





Creating owner Role

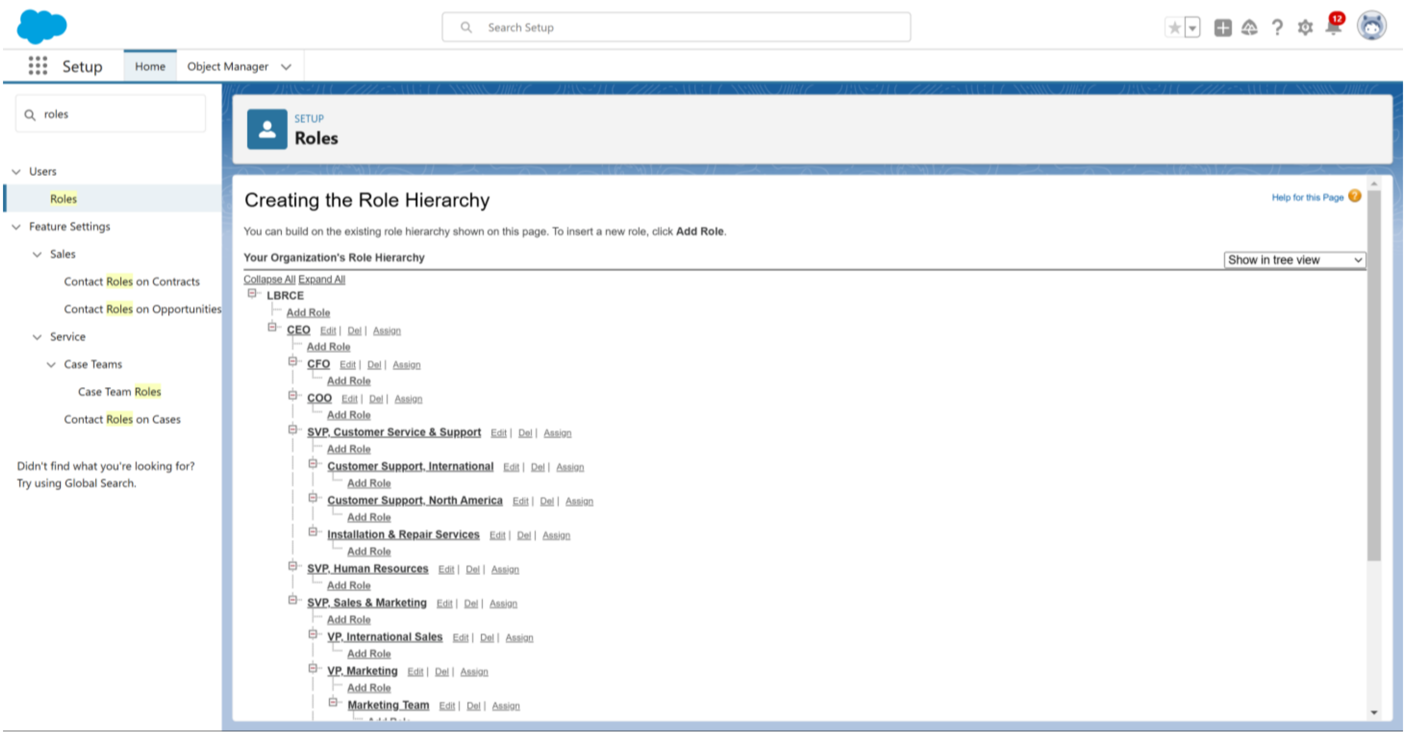
Creating owner Role:

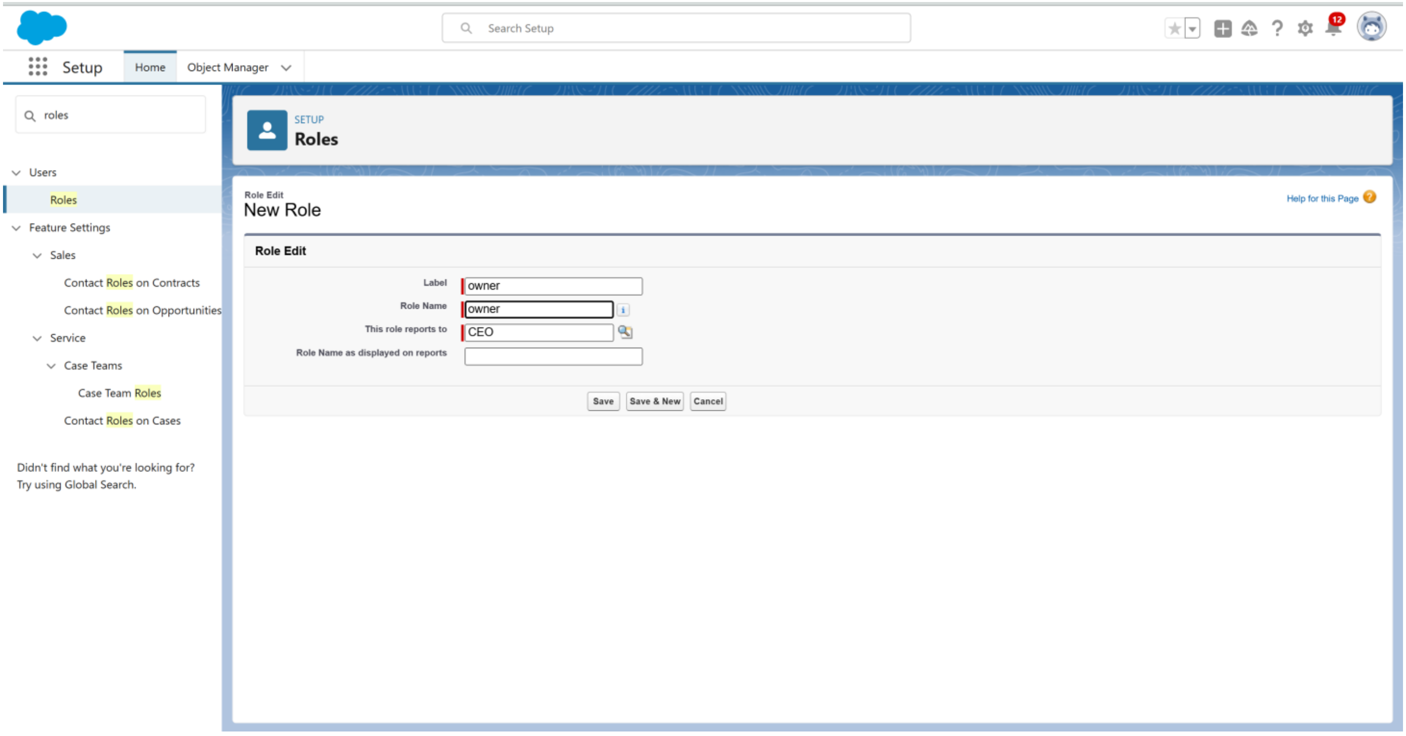
1. Go to quick find >> Search for Roles >> click on set up roles.
2. Click on Expand All and click on add role under whom this role works.
3. Give Label as “owner” and Role name gets auto populated. Then click on Save.
4. Click and save it.

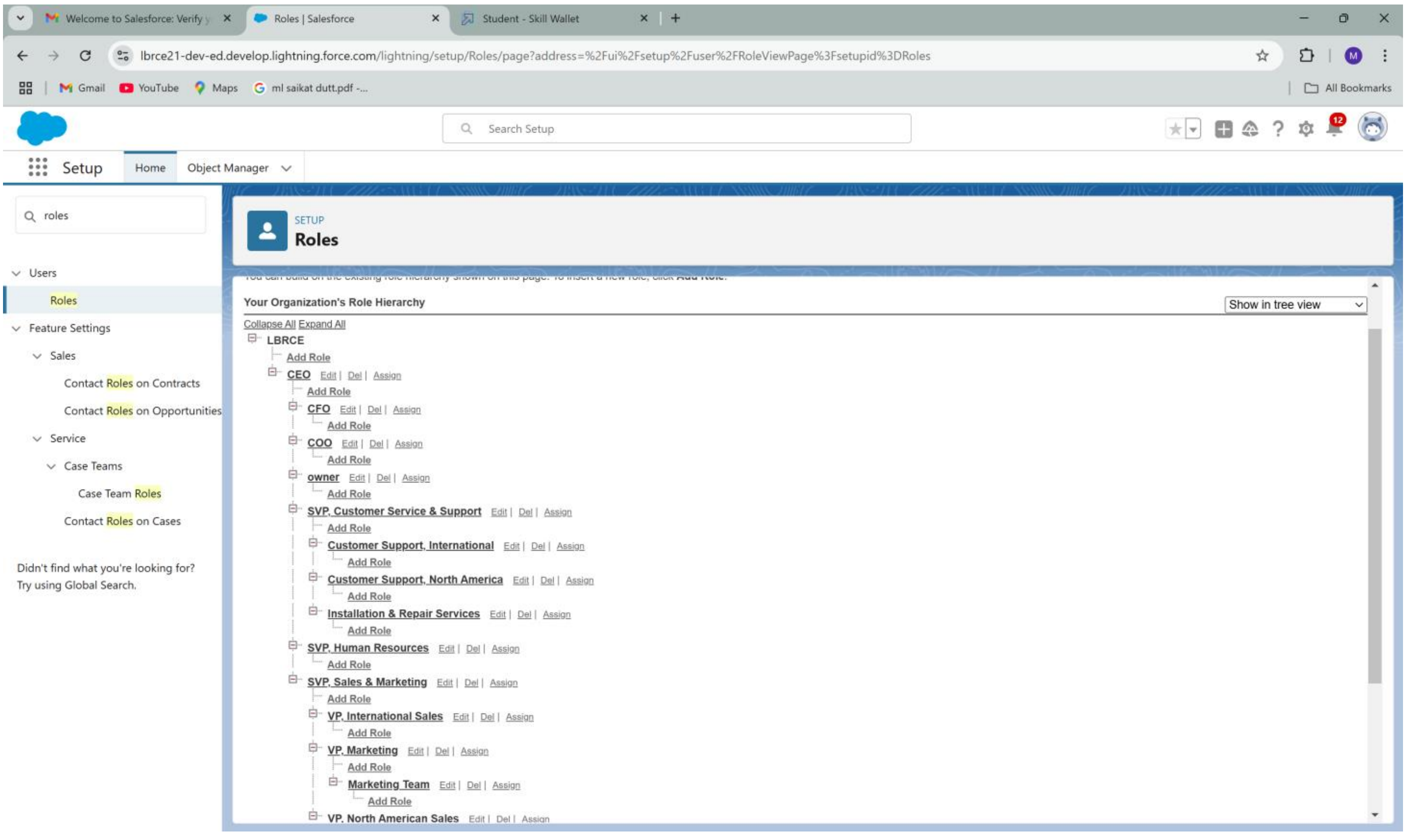
Activity 2: Creating Agent roles

Creating another two roles under Owner

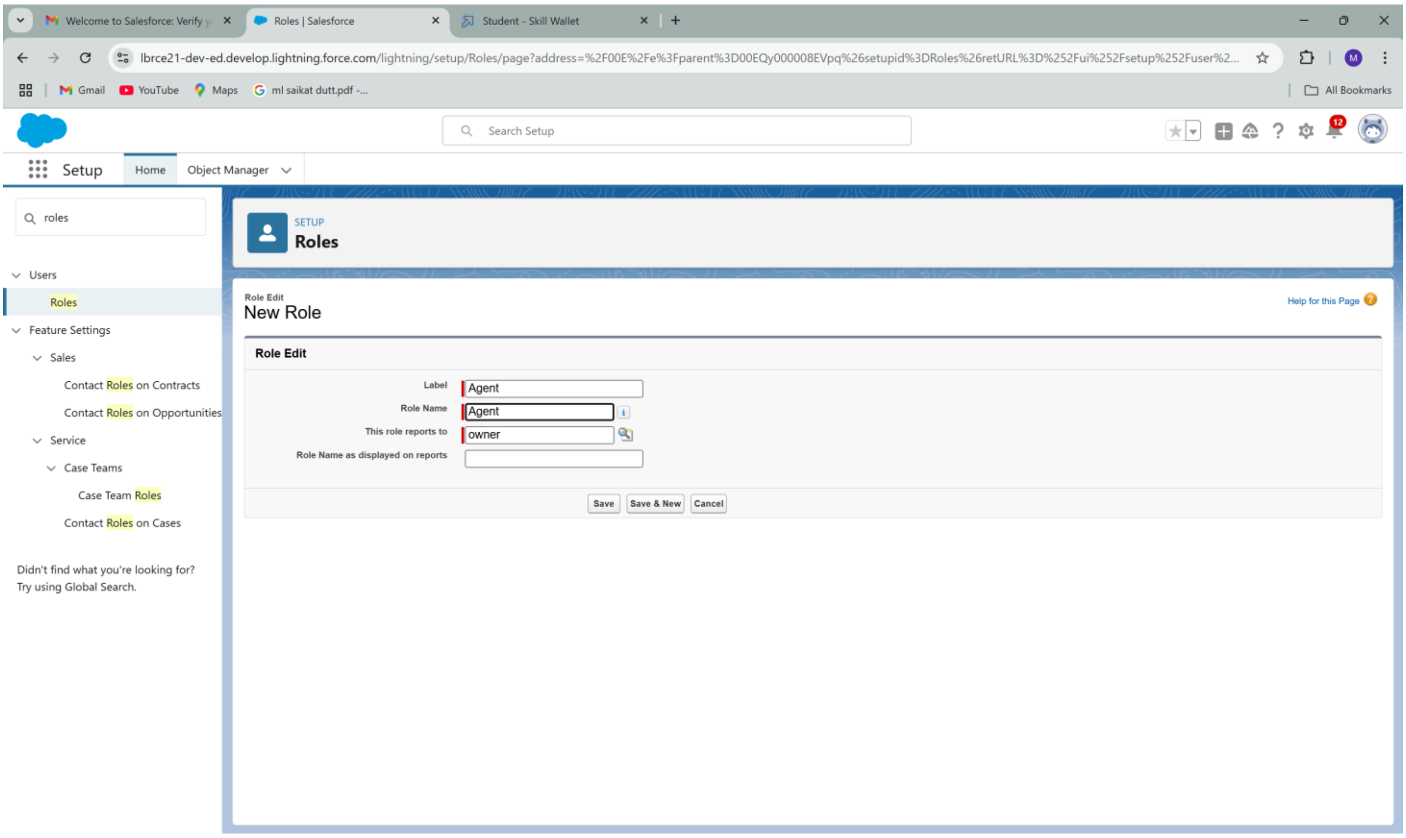
1. Go to quick find - Search for Roles - click on set up roles.
2. Click plus on CEO role, and click add role under owner.
3. Give Label as “Agent” and Role name gets auto populated. Then click on Save.







Roles | Salesforce
SETUP
Roles
Your Organization's Role Hierarchy
Show in tree view
Collapse All Expand All
LBRCE
Add Role
CEO Edit | Del | Assign
CFO Edit | Del | Assign
COO Edit | Del | Assign
owner Edit | Del | Assign
SVP, Customer Service & Support Edit | Del | Assign
Customer Support, International Edit | Del | Assign
Customer Support, North America Edit | Del | Assign
Installation & Repair Services Edit | Del | Assign
SVP, Human Resources Edit | Del | Assign
SVP, Sales & Marketing Edit | Del | Assign
VP, International Sales Edit | Del | Assign
VP, Marketing Edit | Del | Assign
Marketing Team Edit | Del | Assign
VP, North American Sales Edit | Del | Assign



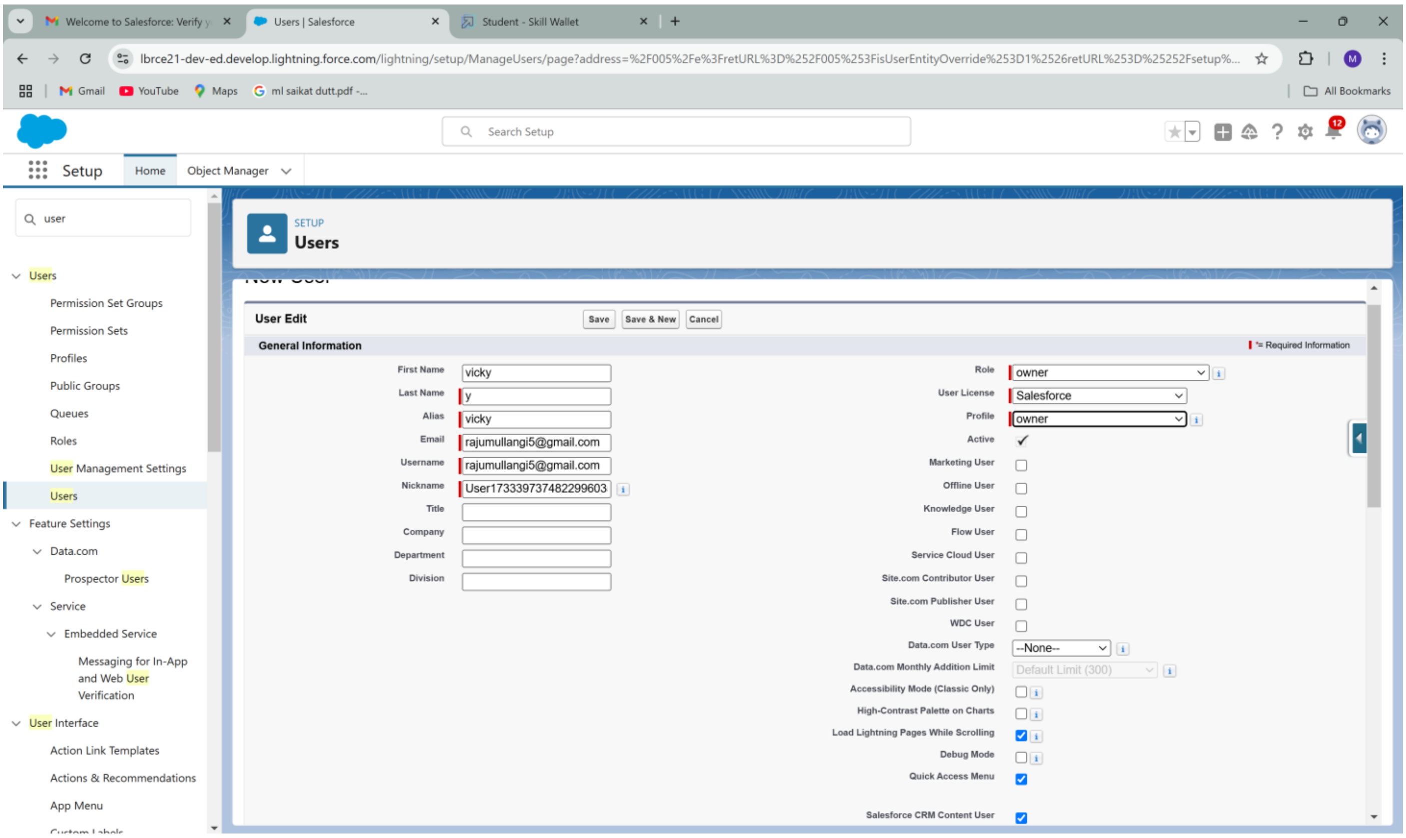
Roles | Salesforce
SETUP
Roles
Role Edit
New Role
Help for this Page
Role Edit
Label Agent
Role Name Agent
This role reports to owner
Role Name as displayed on reports
Save
Save & New
Cancel

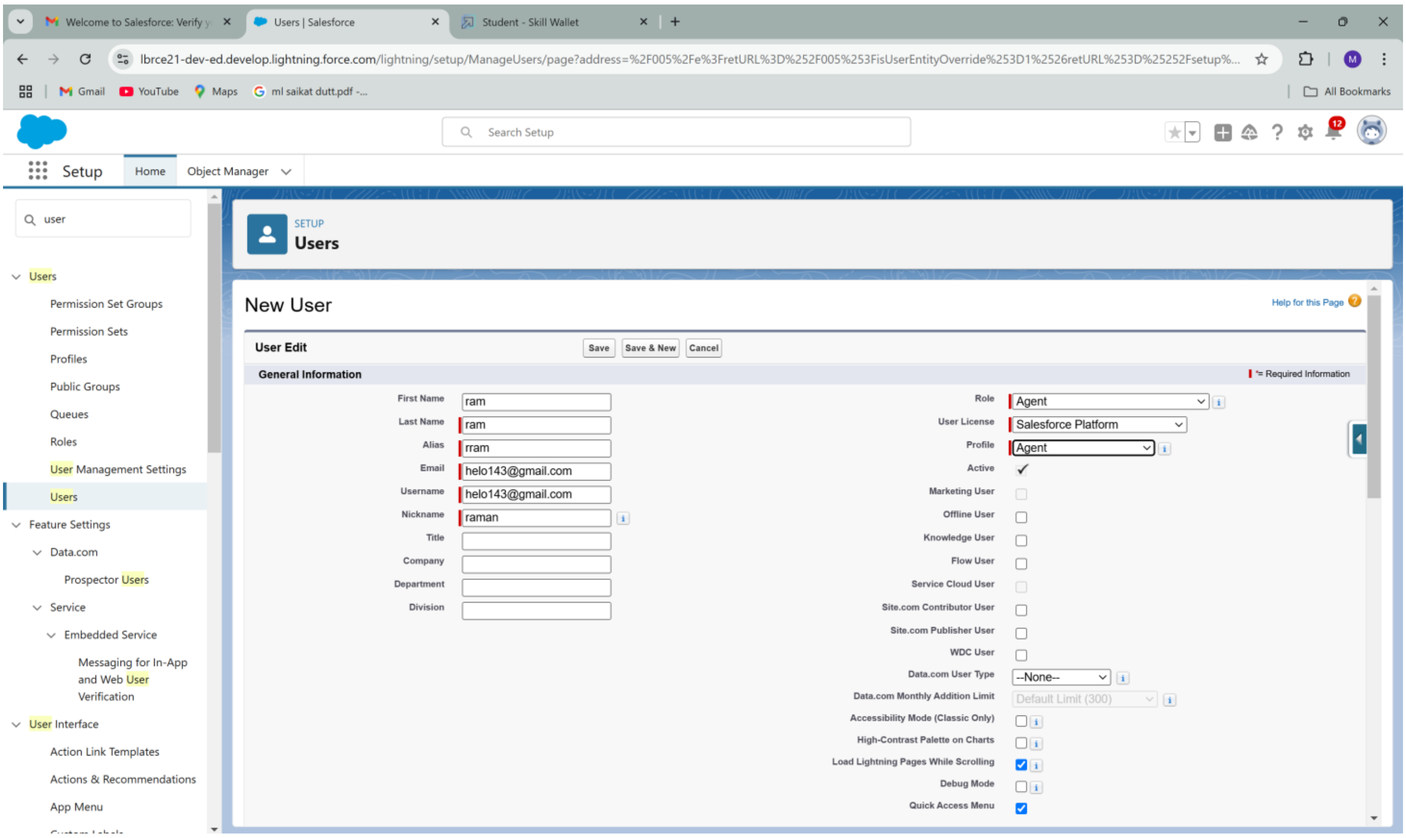
Create User

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.





Create a Flow on dell laptop

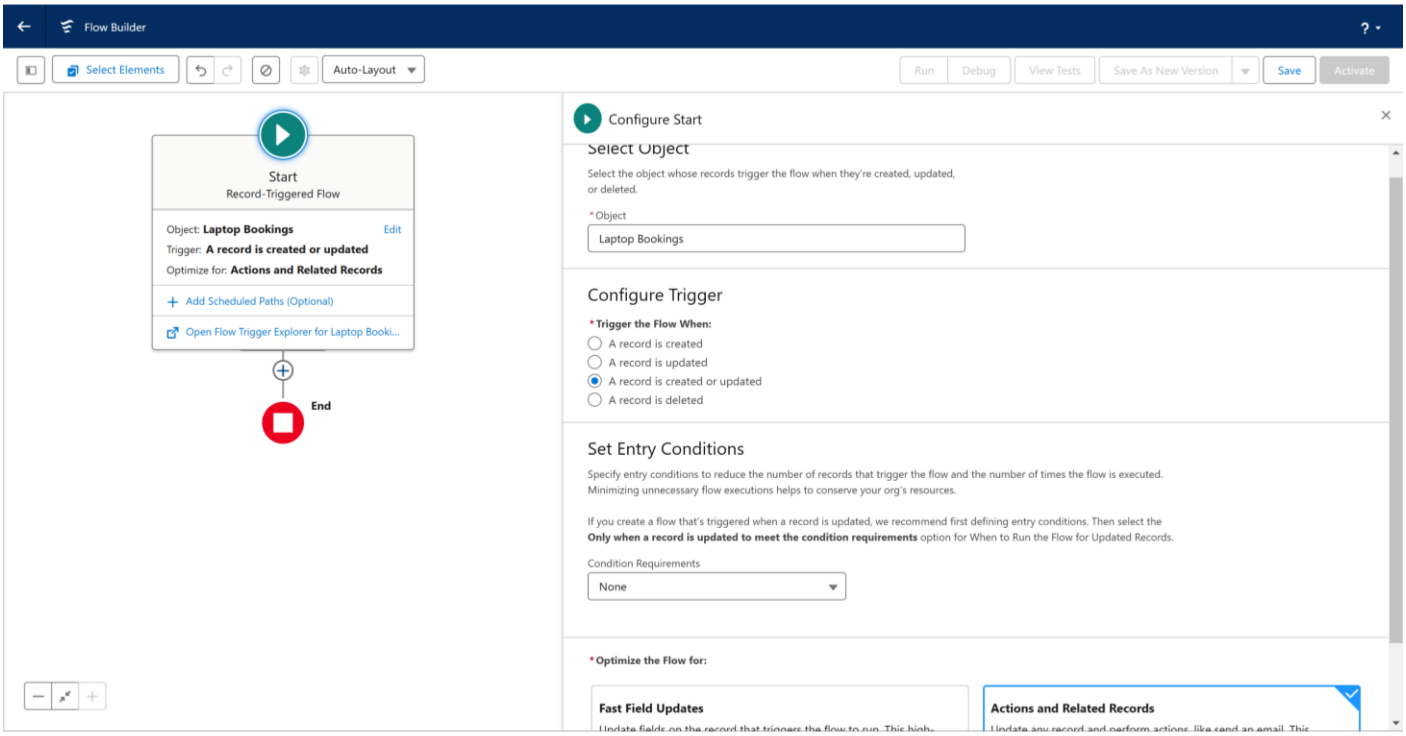
Activity -

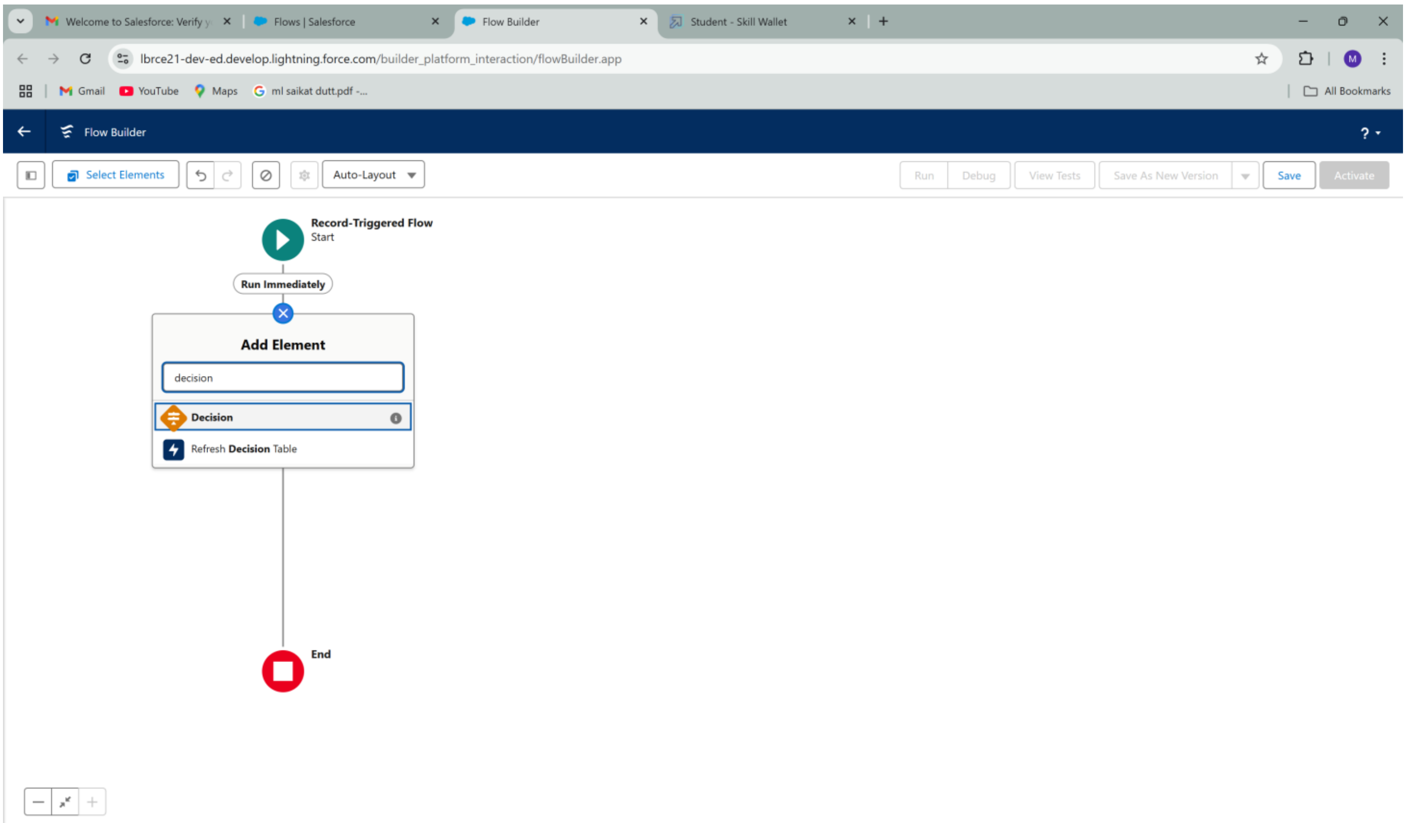
1. Go to setup >>type Flow in quick find box >> Click on the Flow and Select the New Flow.
2. Select the Record-triggered flow and Click on Create.
3. Select the Object as a Laptop Booking in the Drop down list.
4. Select the Trigger Flow when: “A record is Created or Updated”.
5. Select the Optimize 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.

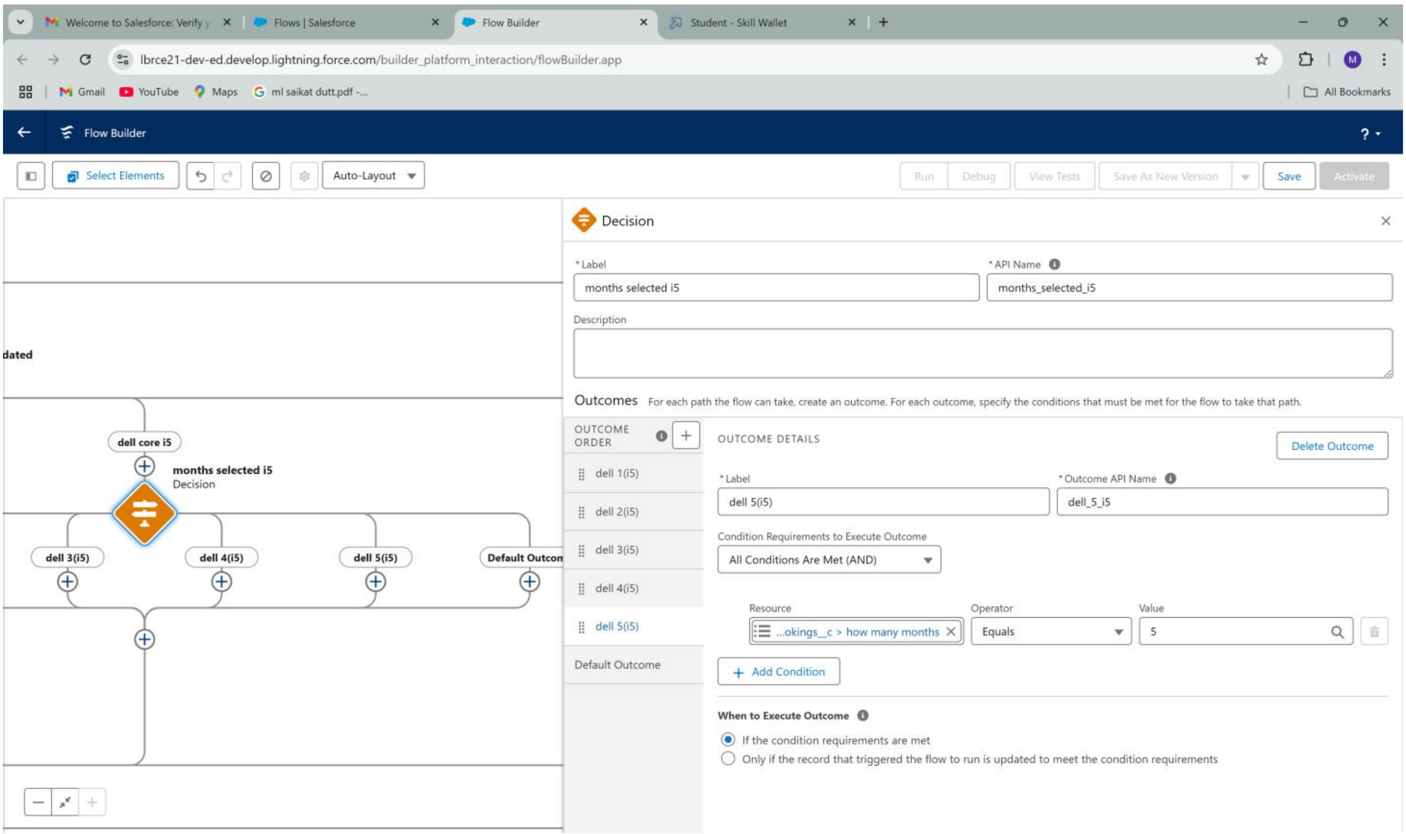
2. Operator: Select Equals.
3. Value: Select core i5.
4. Then again click the symbol'+' outcome details

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.

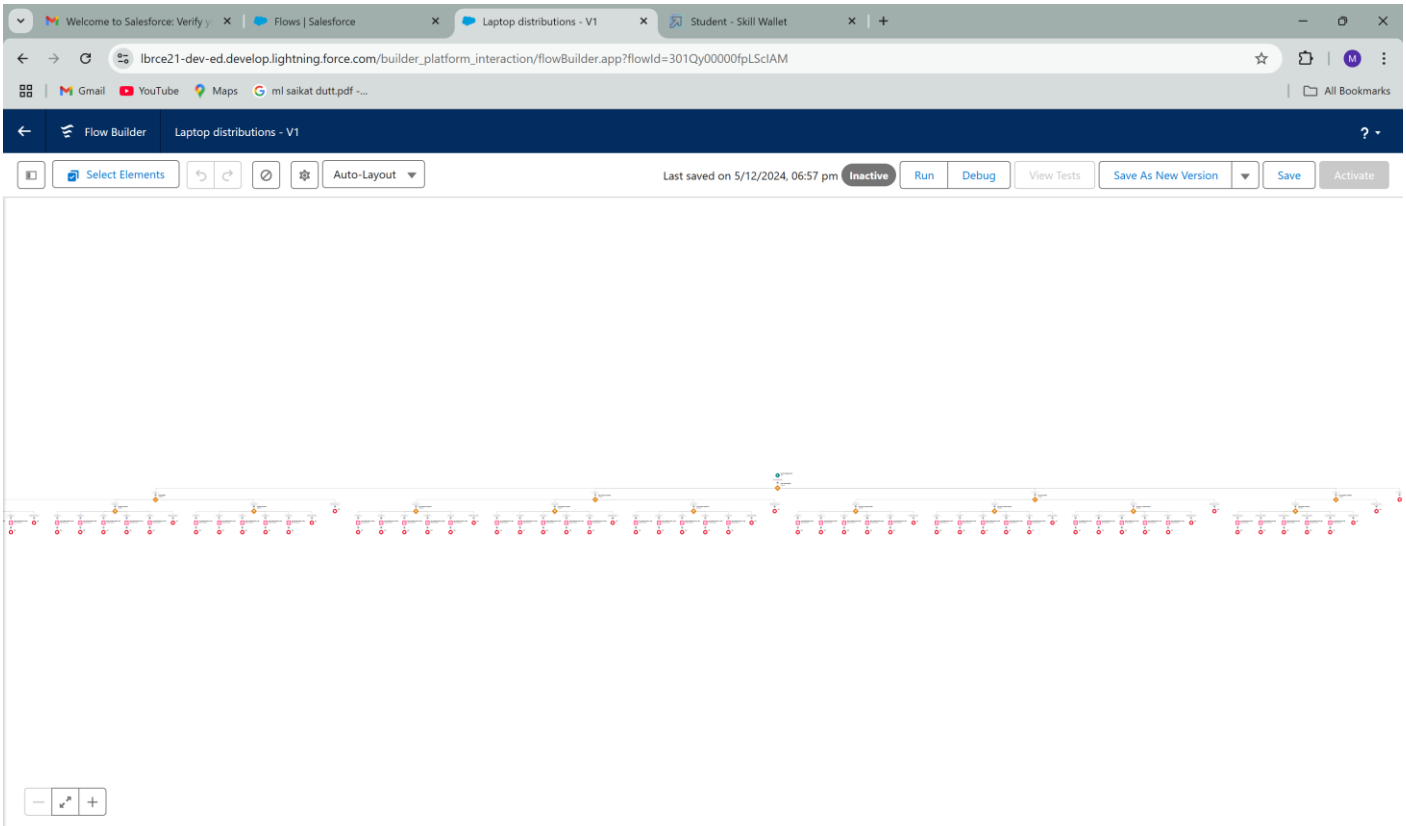
16. Click done.



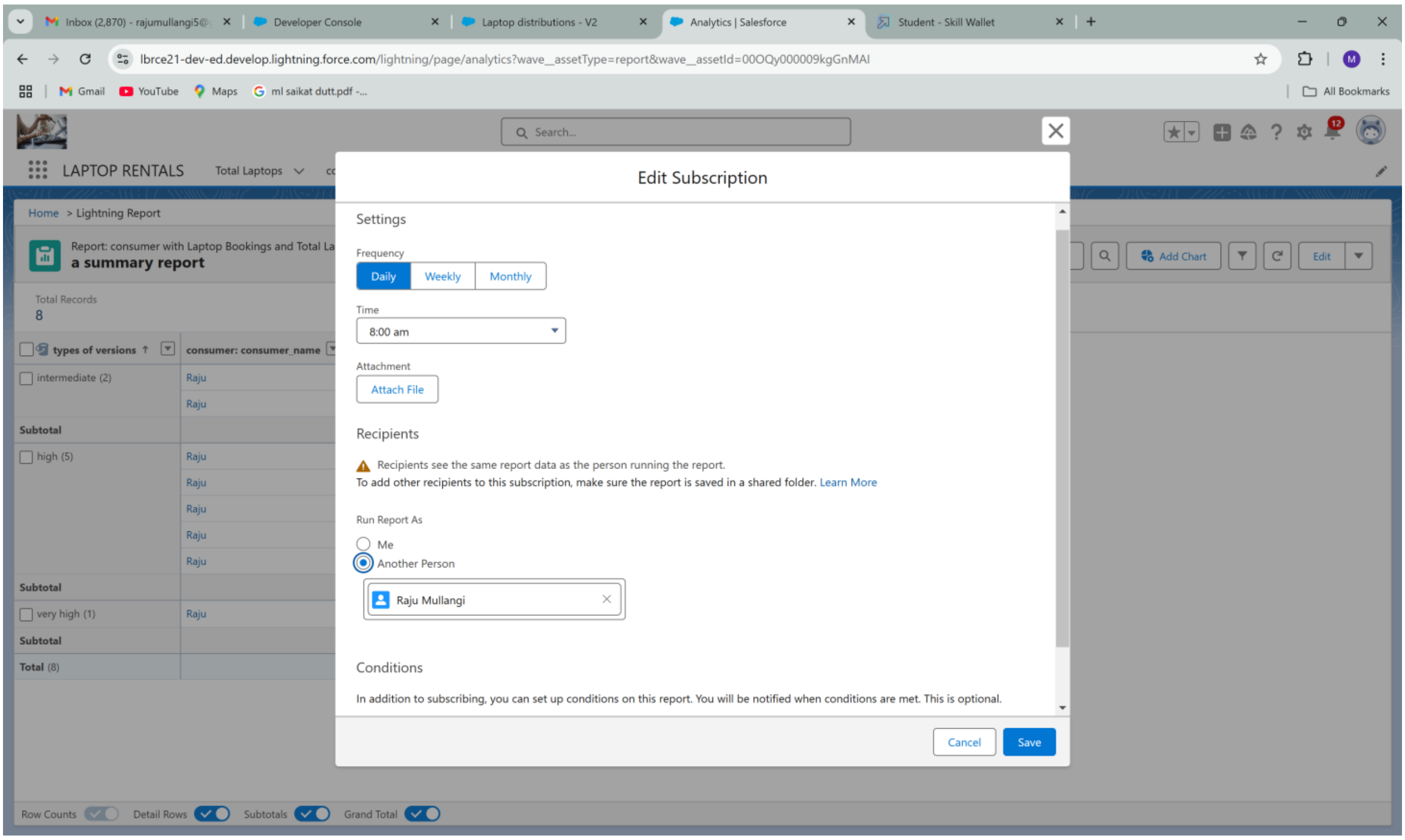




Welcome to Salesforce: Verify
Flows | Salesforce
Flow Builder
Student - Skill Wallet
lbrce21-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app
Gmail
YouTube
Maps
ml saikat dutt.pdf -...
All Bookmarks
Flow Builder
Select Elements
Auto-Layout
Run
Debug
View Tests
Save As New Version
Save
Activate
Decision
*Label
months selected i5
*API Name
months_selected_i5
Description
Outcomes For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.
OUTCOME ORDER
dell 1(i5)
dell 2(i5)
dell 3(i5)
dell 4(i5)
dell 5(i5)
Default Outcome
OUTCOME DETAILS
Delete Outcome
*Label
dell 5(i5)
*Outcome API Name
dell_5_i5
Condition Requirements to Execute Outcome
All Conditions Are Met (AND)
Resource
...okings__c > how many months
Operator
Equals
Value
5
Add Condition
When to Execute Outcome
If the condition requirements are met
Only if the record that triggered the flow to run is updated to meet the condition requirements
dated
dell core i5
months selected i5
Decision
dell 3(i5)
dell 4(i5)
dell 5(i5)
Default Outcon



Welcome to Salesforce: Verify
Flows | Salesforce
Laptop distributions - V1
Student - Skill Wallet
lbrce21-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=301Qy00000fpLSclAM
Gmail
YouTube
Maps
ml saikat dutt.pdf -...
All Bookmarks
Flow Builder
Laptop distributions - V1
Select Elements
Auto-Layout
Last saved on 5/12/2024, 06:57 pm
Inactive
Run
Debug
View Tests
Save As New Version
Save
Activate



Apex Trigger and Handler Class

How to create a new trigger :

1. While still in the trailhead account, navigate to the gear icon in the top right corner.
2. Click on developer console and you will be navigated to a new console window.
3. Click on the File menu in the toolbar, and click on new? Trigger.
4. Enter the trigger name and the object to be triggered.

Syntax For creating trigger :

The syntax for creating trigger is :

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

{

}

Trigger code:

```
trigger LaptopBooking on Laptop_Bookings__c (After insert,after update) {

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

   {

   LaptopBookingHandler.sendEmailNotification(trigger.new);}}
```

Note:- copy the API names

1.LaptopBooking - trigger name

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

Code Snippet :

```
public class LaptopBookingHandler {

    public static void sendEmailNotification (List<Laptop_Bookings__c> lapList){

        for(Laptop_Bookings__c lap:lapList)

        {

            Messaging.SingleEmailMessage email = new Messaging.SingleEmailMessage();

                email.setToAddresses( new List<String>{lap.Email__c});

                email.setSubject('Welcome to our company');

            string body = 'Dear Customer, \n';

            body += 'Welcome to Laptop Rentals! You have been seen as a valuable customer to us.\n Please continue your journey with us, while we try to provide you with good quality resources. \n Laptop Amount = ' + lap.Amount__c + ' \n core type = '+lap.core_type__c +' \n Laptop type = '+lap.Laptop_name__c;

            email.setPlainTextBody(body);

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

        }

    }

}
```

Note:-

1.Class name:- LaptopBookingHandler

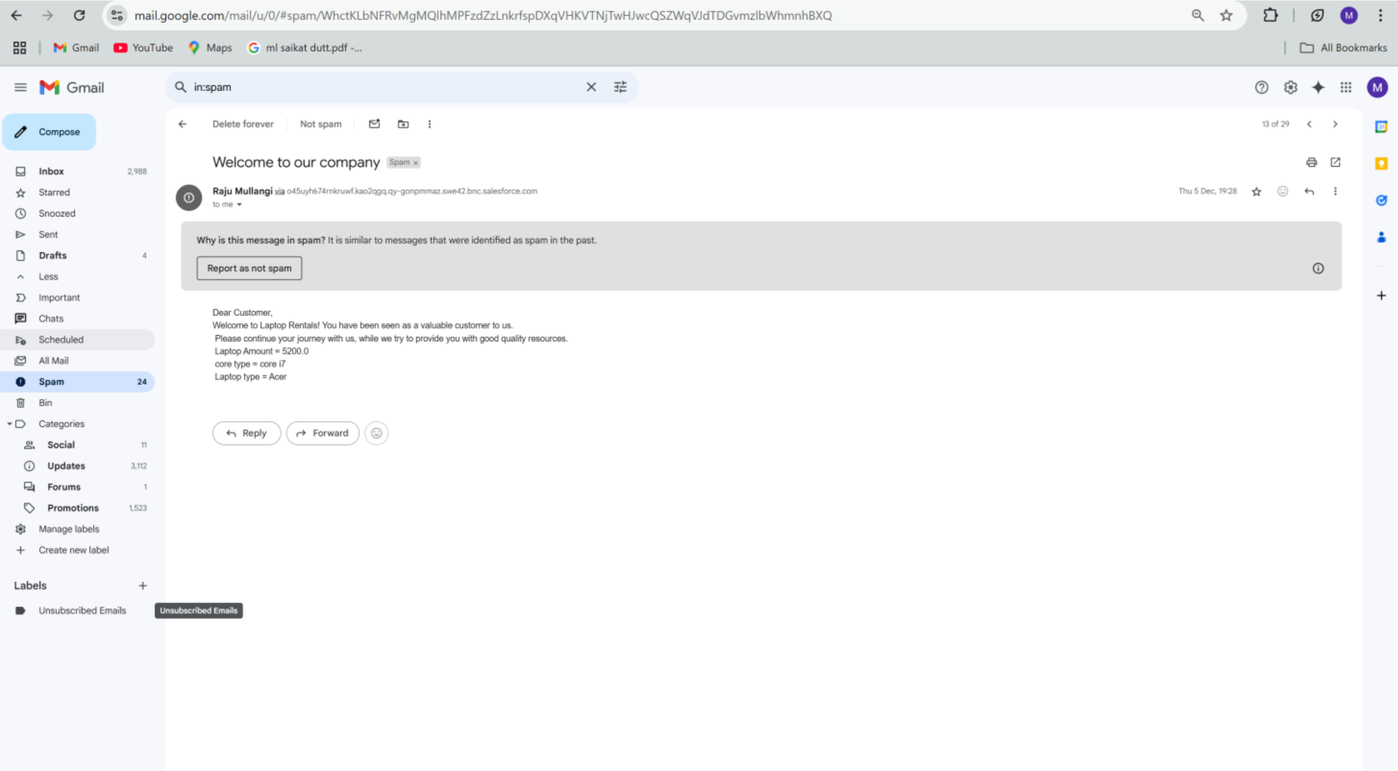
2.API Name:- Laptop_Bookings__c(as per your org go to laptop booking object and copy from that).

3.core__c (as per your org go to laptop booking object and copy from that).

4.Laptop_type__c.(as per your org go to laptop booking object and copy from that).

In this project , trigger is called whenever the particular record's sum exceeds the threshold i.e minimum business requirement value. Then the code in the trigger will get executed.

Result:

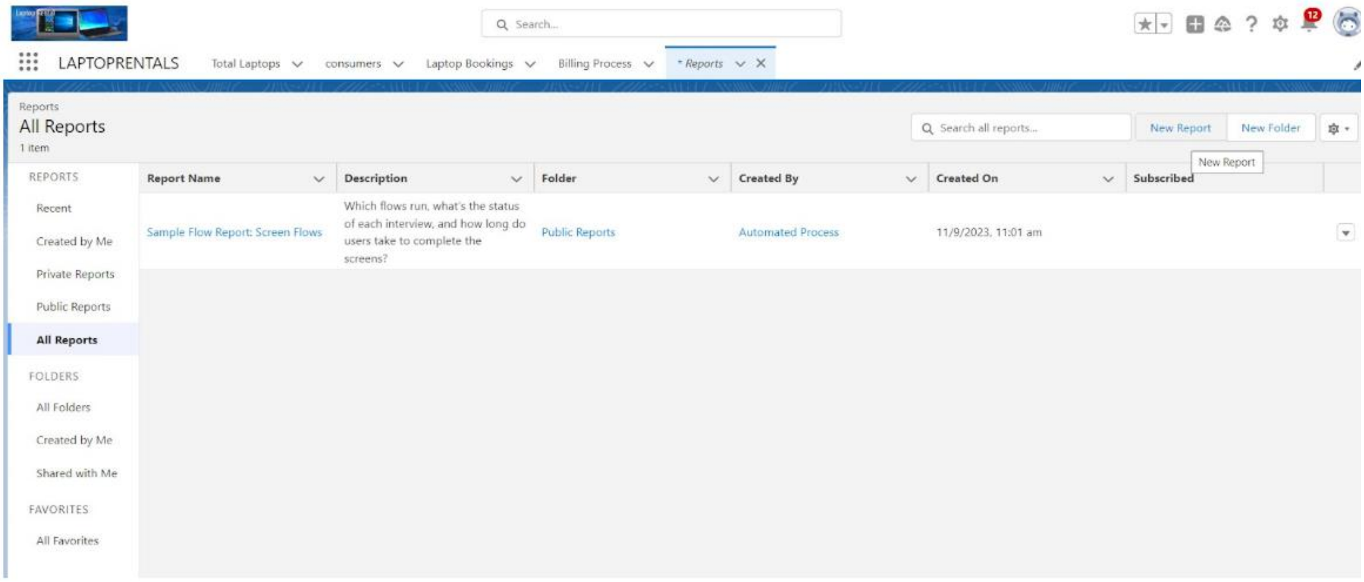


Create Report

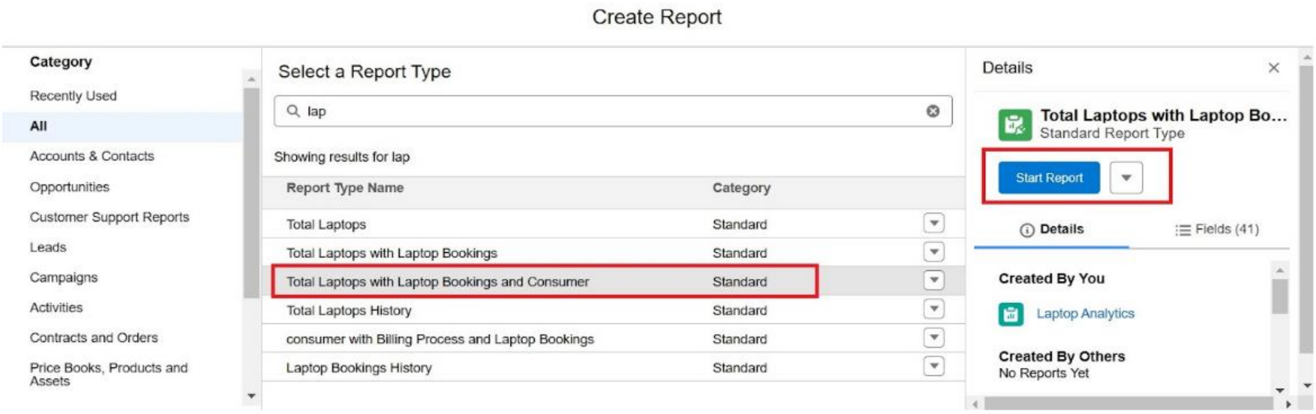
1. **Note: Before creating reports just fill the 10-12 records in the Laptop Bookings object.**

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

1. Go to the app ? click on the reports tab
2. Click New Report.



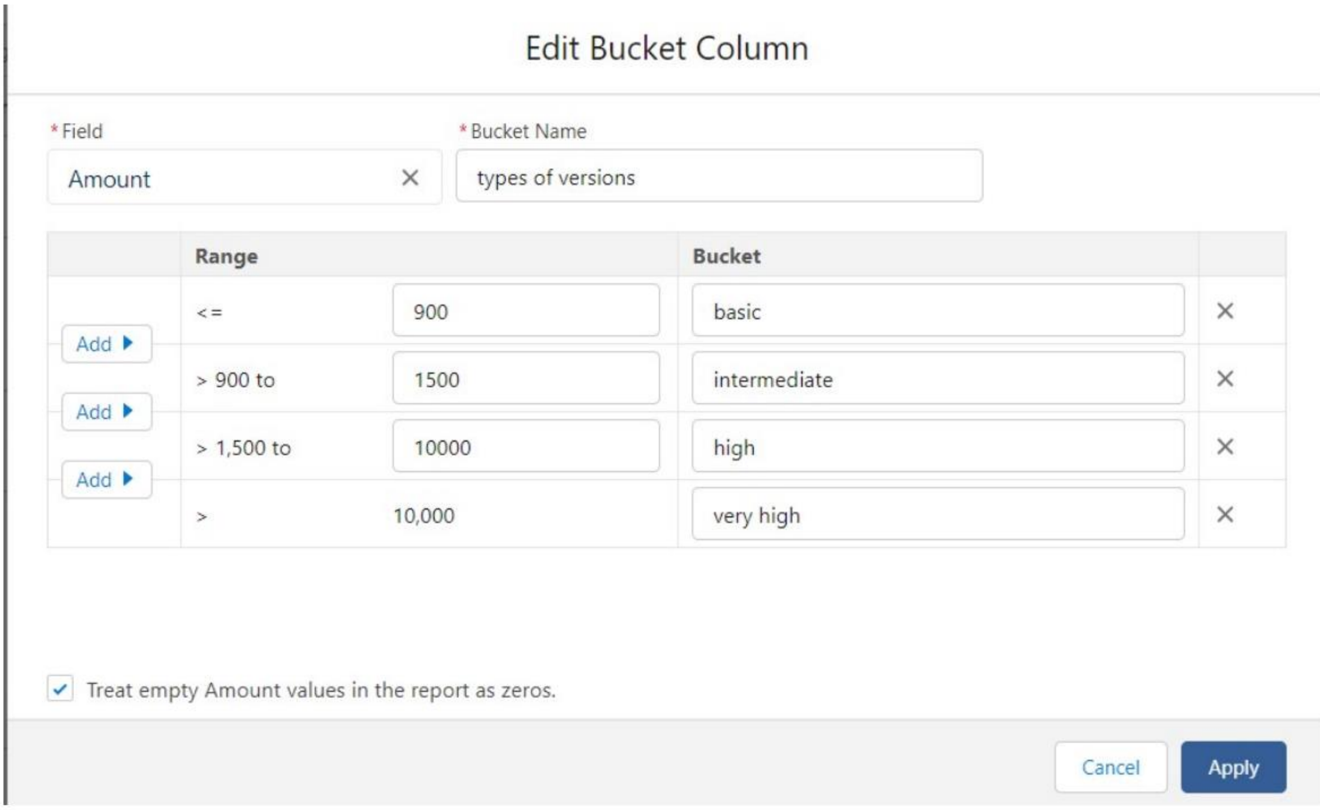
3.Select report type from category or from report type panel or from search panel “consumer with Laptop Bookings and total laptops” ? click on start report.



Create a simple tabular report

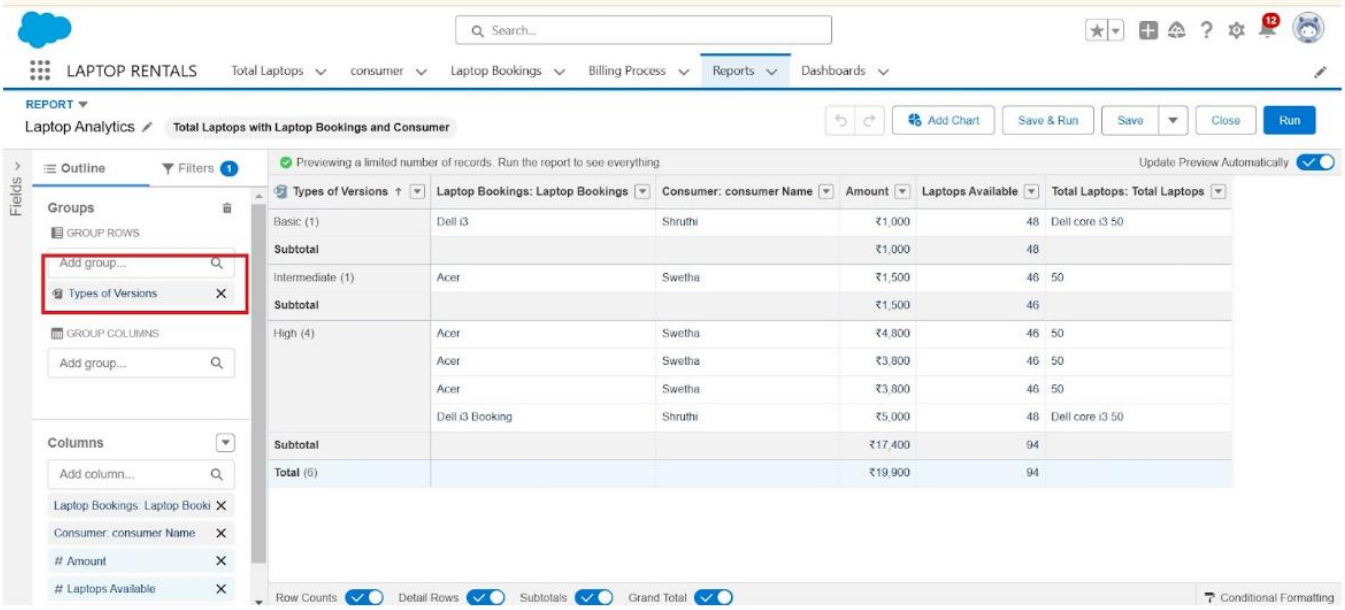
5.Add fields from left pane, make sure that Amount field will be selected.

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

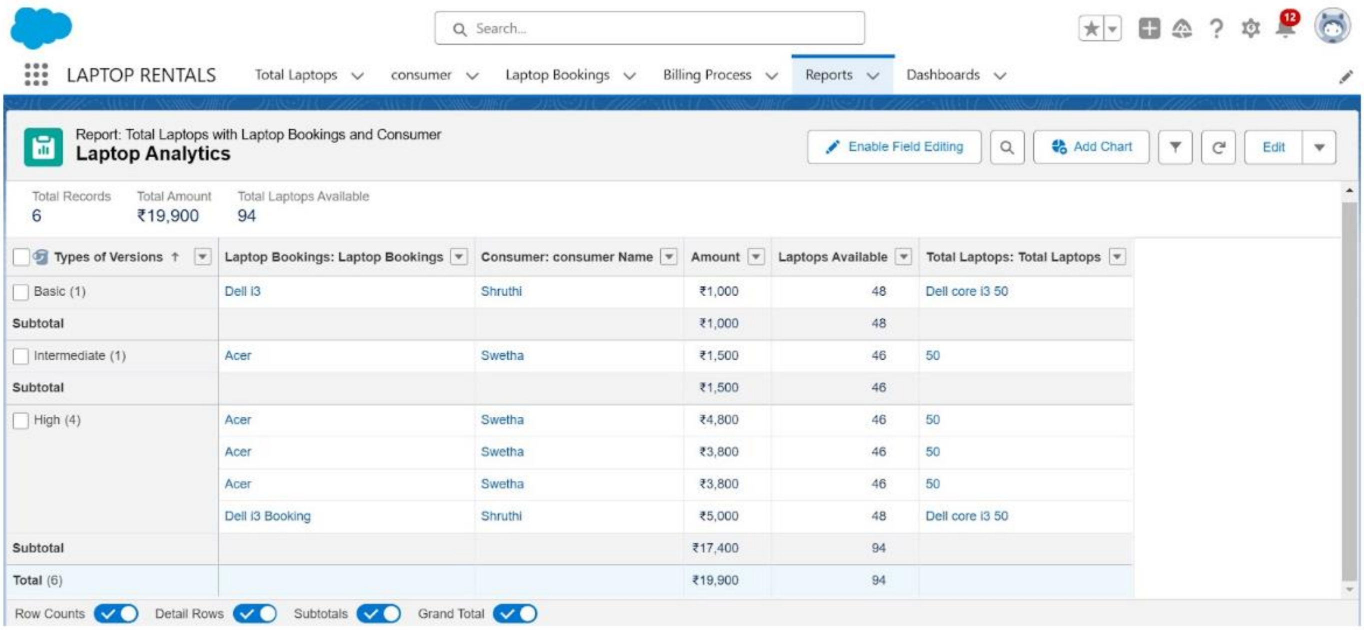


Click apply it.

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

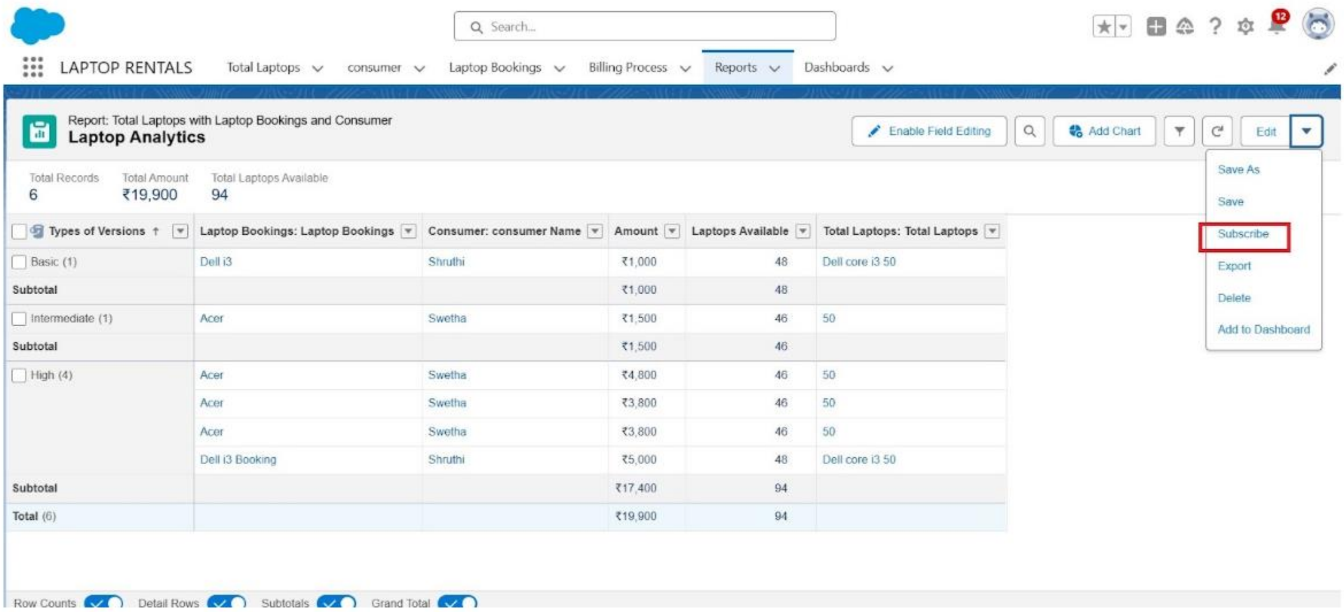


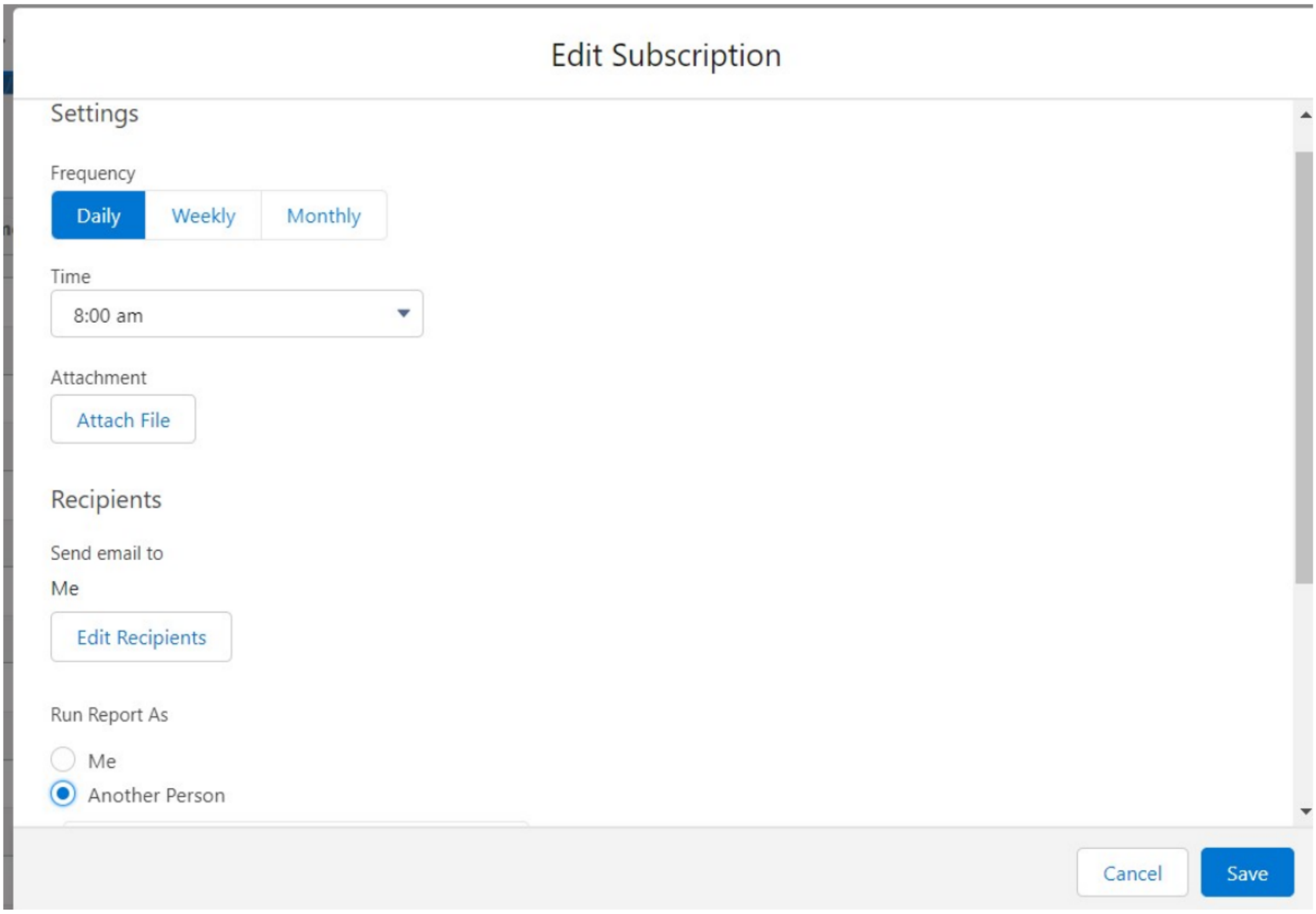
Click on Save & run it.



Sharing report to owner

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



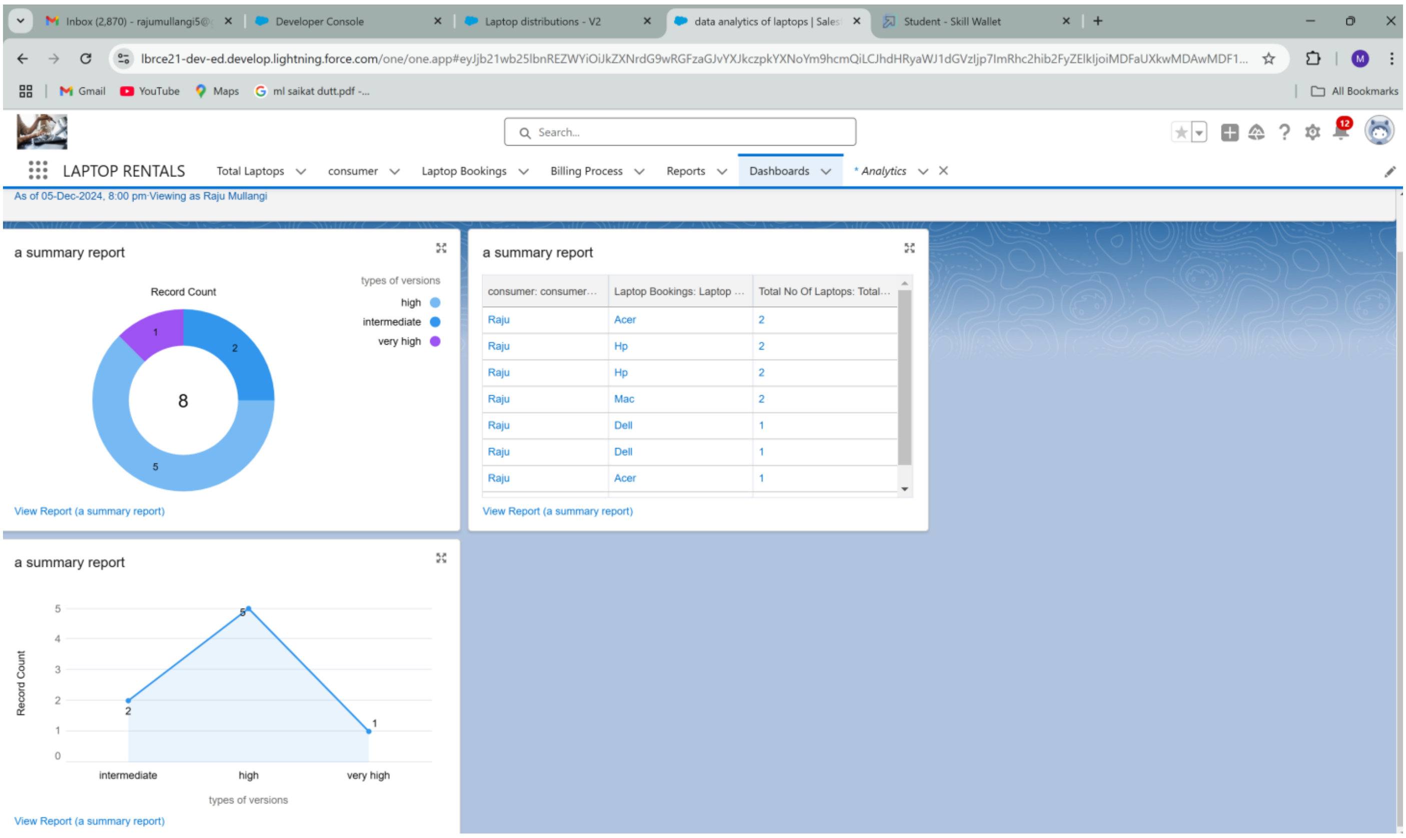


Create Dashboard Folder

1. Click on the app launcher and search for the dashboard.
2. Click on the dashboard tab.
3. Click the new folder, give the folder label as “total rent amount”.
4. Folder unique names will be auto populated.
5. Click save.

Create Dashboard

1. Go to the app >> click on the Dashboards tabs.
2. Give a Name and select the folder that was created, and click on create.
3. Select add component.
4. Select a Report and click on select.
5. Select the dark component and add to the dashboards.
6. Save it.
7. Click done.



Conclusion

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

THE END