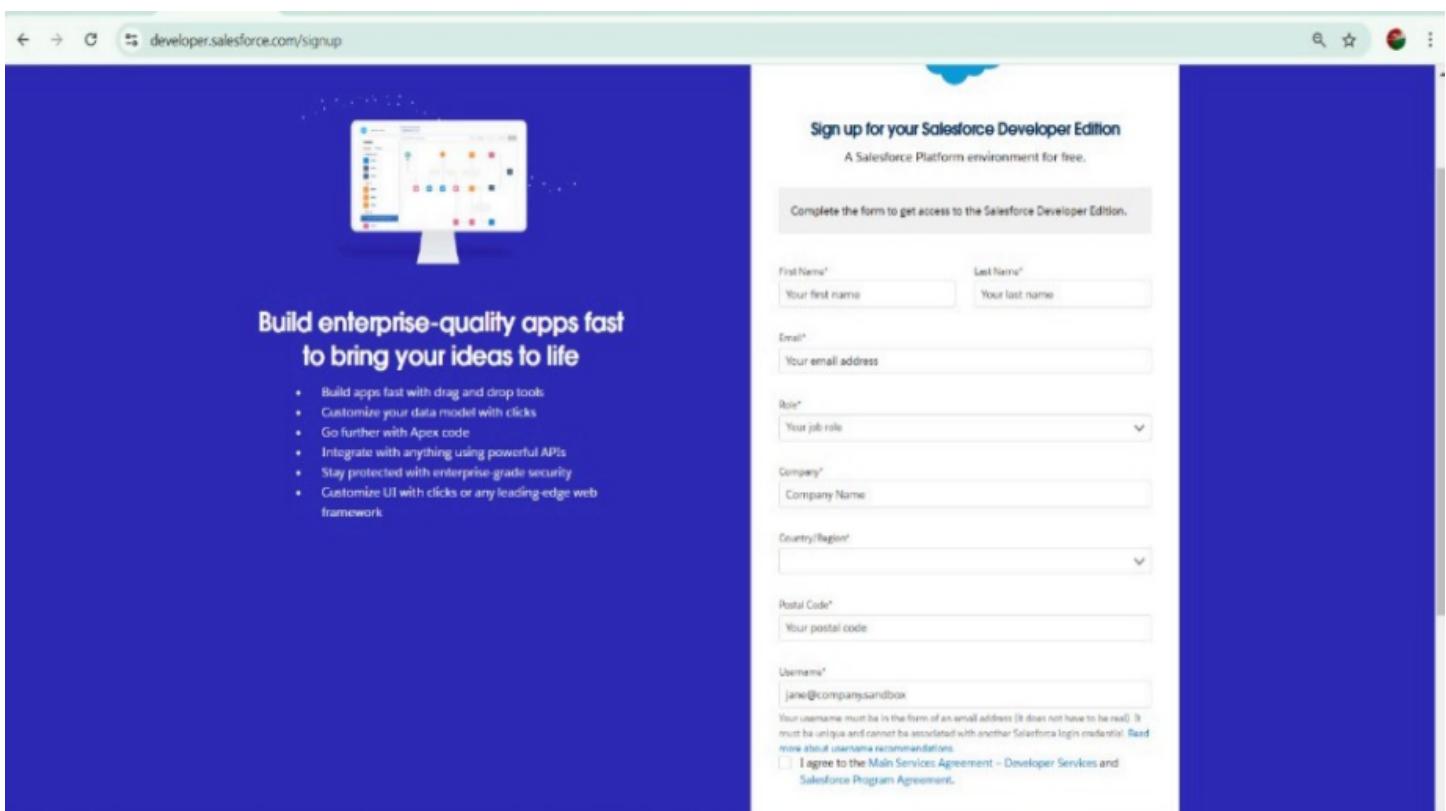


# A CRM APPLICATION FOR LAPTOP RENTALS CRM

Application on Laptop rentals is about delivering the items to the customers by rental purpose. It leverages the power of customer relationship management (CRM) to enhance customer experiences, optimize store operations, and improve overall efficiency. Additionally to these, we also need to do an effective CRM i.e via communicating through email with the potential customers identified.

## Salesforce:

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers. Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.



## Object Creation:

## What Is an Object?

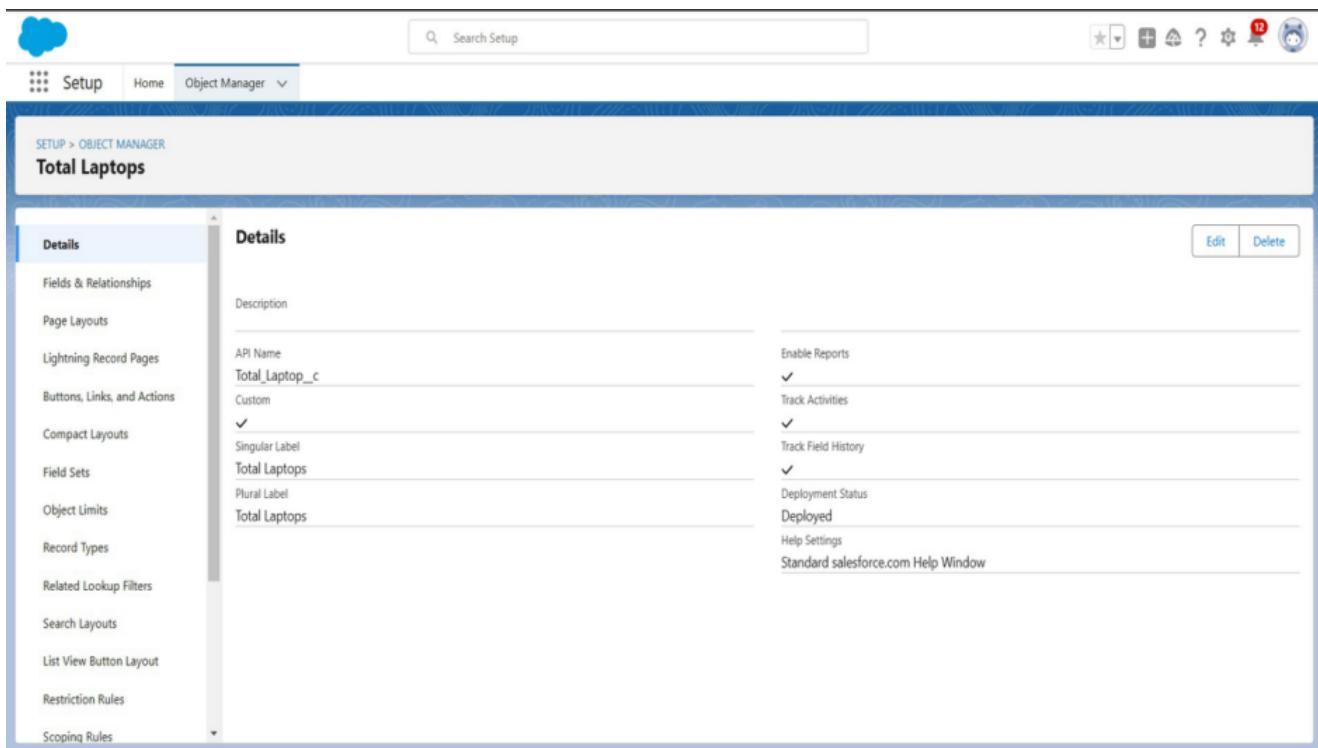
Salesforce objects are database tables that permit you to store data that is specific to an organization.

Salesforce objects are of two types:

1. **Standard Objects:** Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
2. **Custom Objects:** Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

## Create Total Laptops Object

1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
2. Enter the label name >> Total Laptops
3. Plural label name >> Total Laptops
4. Enter Record Name Label and Format Record Name >> Total Laptops Data Type  
>> Text
5. Click on Allow reports, Allow search and Track Field History
6. Allow search >> Save.



## Create consumer Object

1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
2. Enter the label name >> consumer
3. Plural label name >> consumer

4. Enter Record Name Label and Format Record Name >> consumer\_name DataType >> Name
5. Click on Allow reports,Allow search and Track Field History,  
Allow search >> Save.

**consumer**

**Details**

Description

API Name: consumer\_\_c

Custom: ✓

Singular Label: consumer

Plural Label: consumer

Enable Reports: ✓

Track Activities: ✓

Track Field History: ✓

Deployment Status: Deployed

## Create Laptop Bookings Object

1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
2. Enter the label name >> Laptop bookings
3. Plural label name >> Laptop bookings
4. Enter Record Name Label and Format Record Name >> consumer\_name DataType >> Name
5. Click on Allow reports,Allow search and Track Field History,  
Allow search >> Save.

**Laptop Bookings**

**Details**

Description

API Name: Laptop\_bookings\_\_c

Custom: ✓

Singular Label: Laptop Bookings

Plural Label: Laptop Bookings

Enable Reports: ✓

Track Activities: ✓

Track Field History: ✓

Deployment Status: Deployed

## Create Billing Process Object

1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
2. Enter the label name >> Billing process
3. Plural label name >> Billing process
4. Enter Record Name Label and Format Record Name >> consumer\_name DataType >> Name
5. Click on Allow reports, Allow search and Track Field History,

Allow search >> Save.

The screenshot shows the Salesforce Object Manager interface. On the left, a sidebar lists various object settings: 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, and Scoping Rules. The main area is titled 'Billing Process' under 'SETUP > OBJECT MANAGER'. It has two tabs: 'Details' and 'Fields & Relationships'. The 'Details' tab is selected, showing fields for API Name (set to 'Billing\_Process\_\_c'), Singular Label ('Billing Process'), and Plural Label ('Billing Process'). On the right, there are checkboxes for 'Enable Reports' (checked), 'Track Activities' (unchecked), 'Track Field History' (checked), 'Deployment Status' (set to 'Deployed'), and 'Help Settings' (set to 'Standard salesforce.com Help Window'). At the bottom right of the main area are 'Edit' and 'Delete' buttons.

## Tabs

**What is Tab:** A tab is like a user interface that is used to build records for objects and to view the records in the objects.

### Types of Tabs:

- a. **Custom Tabs:** Custom object tabs are the user interface for custom applications that you build in salesforce.com. They look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.
- b. **Web Tabs:** Web Tabs are custom tabs that display web content or applications embedded in the salesforce.com window. Web tabs make it easier for your users to quickly access content and applications they frequently use without leaving the salesforce.com application.
- c. **Visualforce Tabs:** Visualforce Tabs are custom tabs that display a Visualforce page. Visualforce tabs look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.
- d. **Lightning Component Tabs:** Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app.
- e. **Lightning Page Tabs:** Lightning Page Tabs let you add Lightning Pages to the mobile app

navigation menu. Lightning Page tabs don't work like other custom tabs. Once created, they don't show up on the All Tabs page when you click the Plus icon that appears to the right of your current tabs. Lightning Page tabs also don't show up in the Available Tabs list when you customize the tabs for your apps.

## Creating a Custom Tab To create a Tab:

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

The screenshot shows the Salesforce Setup interface with the 'Tabs' tab selected under 'User Interface'. The main area displays the 'Custom Tabs' section, which allows users to create new custom tabs to extend Salesforce functionality or build new application functionality. It includes sections for 'Custom Object Tabs', 'Web Tabs', and 'Visualforce Tabs'. Under 'Custom Object Tabs', there is a table listing four tabs:

Action	Label	Tab Style	Description
Edit   Del	Billing Process	Stack of Cash	
Edit   Del	consumer	People	
Edit   Del	Laptop Bookings	Form	
Edit   Del	Total Laptops	Laptop	

Below the table, there are sections for 'Web Tabs' and 'Visualforce Tabs', both of which currently have no tabs defined.

## The Lightning App

An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

Lightning apps let you brand your apps with a custom color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your org can work more efficiently by easily switching between apps.

## Create a Lightning App To create a lightning app page:

1. Go to setup page >> search “app manager” in quick nd >> 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.

To Add User Proles: Search proles (System administrator) in the search bar >> click on the arrow button >> save & finish.

The screenshot shows the 'Lightning App Builder' interface. The top navigation bar includes 'Lightning App Builder', 'App Settings', 'Pages', and 'LAPTOP RENTALS'. The left sidebar has sections for 'App Settings', 'App Details & Branding' (which is selected), 'App Options', 'Utility Items (Desktop Only)', 'Navigation Items', and 'User Profiles'. The main content area is titled 'App Details & Branding' and contains fields for 'App Name' (LAPTOP RENTALS), 'Developer Name' (LAPTOP\_RENTALS), and 'Description' (Enter a description...). It also includes 'App Branding' options like 'Image' (a laptop icon labeled 'Laptop on rent') and 'Primary Color Hex Value' (#0070D2). Below these are 'Org Theme Options' and 'App Launcher Preview' sections.

## Fields

When we talk about Salesforce, Fields represent the data stored in the columns of arelational database. It can also hold any valuable information that you require for aspecic object. Hence, the overall searching, deletion, and editing of the records become simpler and quicker. Types of Fields:

1. **Standard Fields:** As the name suggests, the Standard Fields are the predenedelds in Salesforce that perform a standard task. The main point is that you can'tsimply delete a Standard Field until it is a non-required standard eld. Otherwise,users have the option to delete them at any point from the application freely. Moreover, we have some elds that you will nd common in every Salesforce application. They are,

>>Created By  
>>Owner  
>> Last Modfied  
>> Field Made During object Creation

**2. Custom Fields:** On the other side of the coin, Custom Fields are highly flexible, and users can change them according to requirements. Moreover, each organizer or company can use them if necessary. It means you need not always include them in the records, unlike Standard fields. Hence, the final decision depends on the user, and he can add/remove Custom Fields of any given form.

## 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 searchbar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data Type as a “Phone” and Click on Next

### To create another fields in an object:

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

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'SETUP > OBJECT MANAGER consumer'. On the left, a sidebar lists various object settings like Page Layouts, Lightning Record Pages, etc. The main content area is titled 'Fields & Relationships' with a sub-header '8 Items, Sorted by Field Label'. A table displays the following fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address_c	Text Area(255)		
consumer status	consumer_status__c	Picklist		
consumer_name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Email	Email_c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone Number	Phone_Number__c	Phone		

## Creating the field in Laptops Bookings object To create fields in an object:

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

- bar >> click on the object.
- Now click on “Fields & Relationships” >> New
  - Select Data Type as a “Picklist”
  - Picklist values are:-1.Dell 2.Acer 3.Hp 4.Mac

Field Label: Laptop names

Values:  Enter values, with each value separated by a new line

Dell  
Acer  
Hp  
Mac

Field Name: Laptop\_type

Description:

Help Text:

- Select required
- 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:

- Go to setup >> click on Object Manager >> type object name(Laptop Booking)in the search bar >> click on the object.
- Now click on “Fields & Relationships” >> New
- Select Data Type as a “Picklist”
- Picklist values are:-1.core i3 2.Core i5 3.Core i7 .

Field Label: Processors

Values:  Enter values, with each value separated by a new line

core i3  
core i5  
core i7  
bionic chip

Field Name: Processors

Description:

Help Text:

- Select required
- Click on Next >> Next >> Save and new

## NOTE:-

### Field Dependency:

1. A field dependency refers to a relationship between two fields on an object where the values of one field determine the available values for another field. Field dependencies are commonly used to create picklist field relationships, where the available options in a dependent picklist are determined by the value selected in a controlling picklist.

### Need to use Field Dependency:

1. By using the field dependency we can get the different Values by selecting the different Picklist.

### 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. click field dependency and next
3. Click the include value for dell-core i3,i5,i7 and for acer i3,i4,i5 and for hpi3,i4,i5 and also for mac bionic chip include the values for it.

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 'Processors'. The grid below shows processor names categorized by laptop brand. A legend indicates that yellow cells represent 'Included Value' and grey cells represent 'Excluded Value'. The 'Included Value' status is applied to specific processor entries like 'core i3', 'core i5', 'core i7' for Dell, and 'Bionic chip' for HP and Mac.

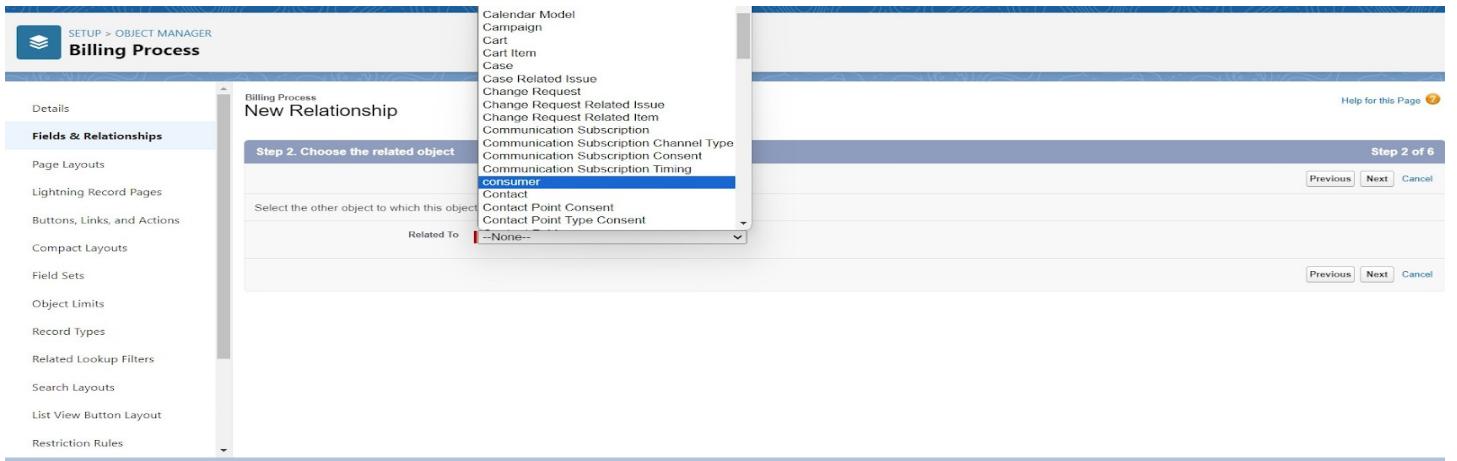
## To Create a Fields & Relationship for Billing Process Object

1. Go to setup >> click on Object Manager >> type object name(Billing Process) inthe 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

1. Change the Field Label: Name

2. click on Next >> Next >> Save and new



## Creation of another fields for the billing process objectTo create fields in an object:

- a. Go to setup >> click on Object Manager >> type object name(Billing Process)in the search bar >> click on the object.
- b. Now click on “Fields & Relationships” >> New
- c. Select Data Type as a “Picklist”
- d. Fill the Above as following:

1. Field Label: Payment Mode
2. Value >> Select enter values with each value separated by a new line
  - i. Cash
  - ii. Check
  - iii. Credit card
  - iv. Debit card
  - v. UPI
  - vi. Phonepe
  - vii. Gpay
  - viii. Paytm

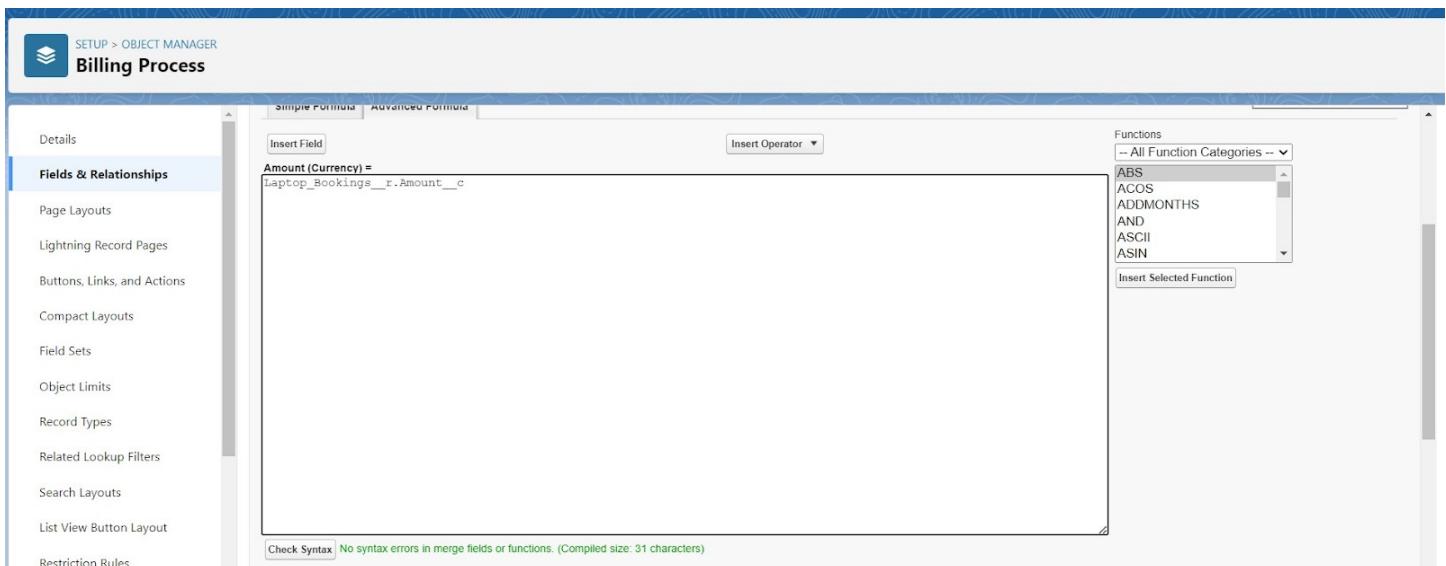
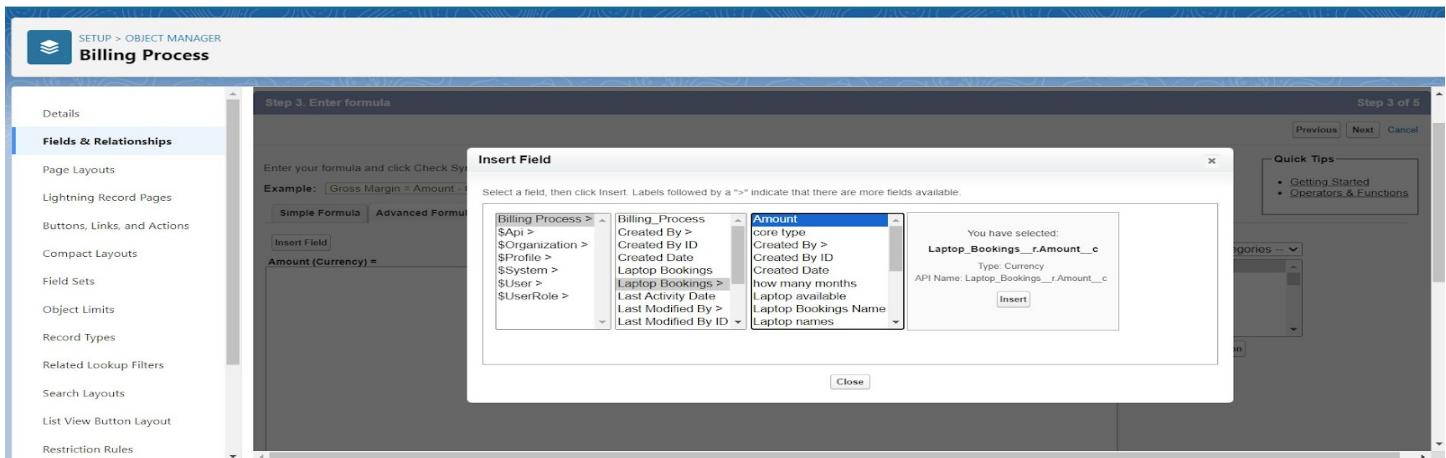
3. Select required

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

## Create a Cross object formula Field in billing process 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 “Formula”

4. Click on Next
5. Enter the Field label: Amount, the Field name gets auto generated and click on Next.(Formula return type Number).
6. In the Advanced Formula Click on the Insert field in the popup Screen Select the Billing Process and in the second drop down select the Laptop Booking and in the three drop down select the Amount field and click on Insert
7. "Laptop\_Booking\_\_r.Amount\_\_c".
8. Click on the Check syntax: No syntax errors in merge fields.



## Creating the field in Total Laptops object

### 1. To create fields in an object:

- a. Go to setup >> click on Object Manager >> type object name(Total Laptops) in search bar >> click on the object.
- b. Now click on "Fields & Relationships" >> New
- c. Select Data type as a "Formula" and Click on Next

- d. Fill the Above as following:
- e. Field Label: Laptops Available
- f. Field Name : It's gets auto generated
- g. Select the Formula Return Type as "Number"
- h. Select the Decimal places as "0" and Click on Next

The screenshot shows the 'Object Manager' page for creating a new field. The field is named 'Total laptops'. The 'Field Label' is set to 'Laptops Available' and the 'Field Name' is 'Laptops\_Available'. Under 'Formula Return Type', the 'Number' option is selected. The 'Decimal Places' dropdown is set to 0. A note at the bottom right says 'Example: 999'.

## Validation rule

Validation rules are applied when a user tries to save a record and are used to check if the data meets specified criteria. If the criteria are not met, the validationrule triggers an error message and prevents the user from saving the record untilthe issues are resolved.

Improve the quality of your data using validation rules. Validation rules verify thatthe data a user enters in a record meets the standards you specify before the usercan save the record. A validation rule can contain a formula or expression that

evaluates the data in one or more fields and returns a value of "True" or "False". Validation rules also include an error message to display to the user when the rulereturns a value of "True" due to an invalid value.

## Creating the validation rule for phone number field in consumerobject

1. Go to the setup page - click on object manager - From drop down click editfor 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.
6. Save the validation rule

## Profiles

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. Profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access,

Page layouts, Record Types, Login hours & Login IP ranges. You can define profiles by the user's job function. For example System Administrator, Developer, Sales Representative.

Types of profiles in salesforce

### 1. Standard profiles:

By default salesforce provides below standard profiles.

1. Contract Manager
2. Read Only
3. Marketing User
4. Solutions Manager
5. Standard User
6. System Administrator.

We cannot delete standard ones

Each of these standard ones includes a default set of permissions for all of the standard objects available on the platform.

## **2. Custom Profiles:**

Custom ones defined by us.

They can be deleted if there are no users assigned with that particular one.

## **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

Profile Owner

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Profile Detail		Edit   Clone   Delete   View Users	
Name	Owner		
User License	Salesforce	Custom Profile <input checked="" type="checkbox"/>	
Description			
Created By	Buvan Chandra Kumar Singh Chowhan	18/11/2024, 11:23 am	Modified By <a href="#">Buvan Chandra Kumar Singh Chowhan</a> 18/11/2024, 11:24 am

**Page Layouts**

Standard Object Layouts		Global		Invoice		Invoice Line	
Email Application	Not Assigned	[View Assignment]	Not Assigned	[View Assignment]	Not Assigned	[View Assignment]	
Home Page Layout	DE Default	[View Assignment]	DE Default	[View Assignment]	DE Default	[View Assignment]	
Account	Account Layout	[View Assignment]	Account Layout	[View Assignment]	Account Layout	[View Assignment]	
Alternative Payment Method	Alternative Payment Method Layout	[View Assignment]	Alternative Payment Method Layout	[View Assignment]	Alternative Payment Method Layout	[View Assignment]	

**Custom Object Permissions**

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

The screenshot shows the Salesforce Profiles setup page. At the top, there's a search bar with 'Q profil' and a sidebar with 'Users' and 'Profiles'. A message says 'Didn't find what you're looking for? Try using Global Search.' The main area is titled 'Profile Agent' with a sub-section 'User Profile'. It lists permissions like 'Login IP Ranges', 'Enabled Apex Class Access', etc. Below is 'Profile Detail' with fields for Name (Agent), User License (Salesforce Platform), Description, Created By (Buyan Chandra Kumar Singh Chowhan), Modified By (Buyan Chandra Kumar Singh Chowhan), and a 'Custom Profile' checkbox. Under 'Page Layouts', it shows standard object layouts for various objects like Global, Email Application, Home Page Layout, Account, Alternative Payment Method, Fulfillment Order Item Tax, Fulfillment Order Product, Ideas, Individual, and Invoice.

This screenshot shows the 'Custom Object Permissions' section of the Profiles setup page. It includes sections for 'Contact Point Consents', 'Contact Point Emails', and 'User External Credentials', each with checkboxes for various permissions. Below is the 'Custom Object Permissions' table:

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

Below this is the 'Session Settings' section with fields for 'Session Times Out After' (2 hours of inactivity) and 'Session Security Level Required at Login' (None). The 'Password Policies' section follows, containing fields for password expiration (90 days), history (3 passwords remembered), length (8), complexity (must include alpha and numeric characters), question requirement (cannot contain password), maximum attempts (10), and lockout period (15 minutes).

## Roles and Hierarchy

A role in Salesforce defines a user's visibility access at the record level. Roles may be used to specify the types of access that people in your Salesforce organization can have to data. Simply put, it describes what a user could see within the Salesforce organization.

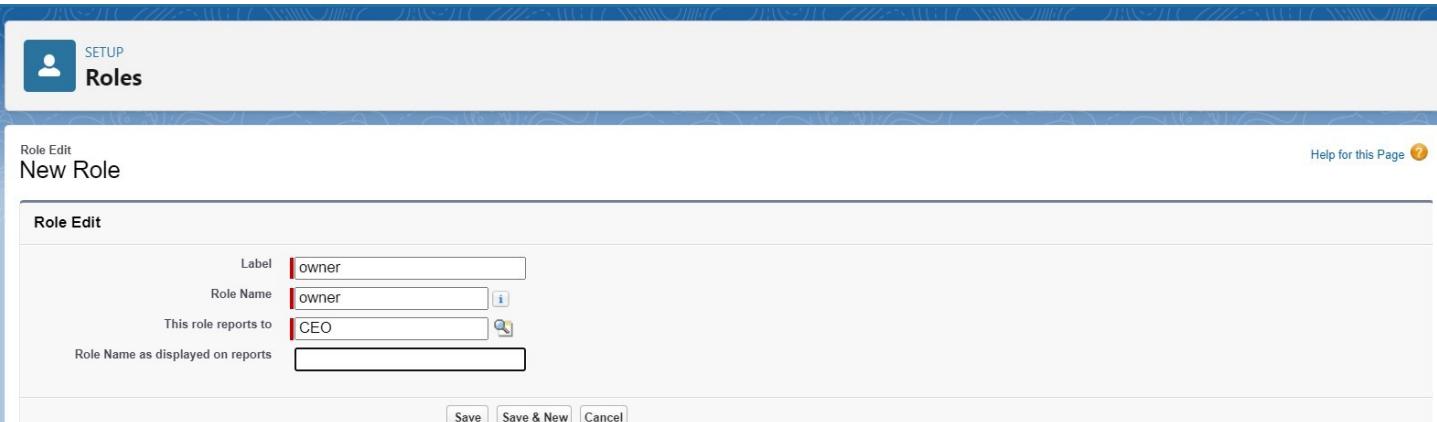
### Creating owner Role

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 onSave.

[Collapse All](#) [Expand All](#)

- [-] PVPST
  - [+/-] Add Role
  - [+/-] CEO [Edit](#) | [Del](#) | [Assign](#)
    - [+/-] Add Role
    - [+/-] CFO [Edit](#) | [Del](#) | [Assign](#)
      - [+/-] Add Role
    - [+/-] COO [Edit](#) | [Del](#) | [Assign](#)
      - [+/-] Add Role
    - [+/-] owner [Edit](#) | [Del](#) | [Assign](#)
      - [+/-] Add Role



## Creating agent 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.

Give Label as "agent and Role name gets auto populated. Then click on Save.

[Collapse All](#) [Expand All](#)

- [-] PVPST
  - [+/-] Add Role
  - [+/-] CEO [Edit](#) | [Del](#) | [Assign](#)
    - [+/-] Add Role
    - [+/-] CFO [Edit](#) | [Del](#) | [Assign](#)
      - [+/-] Add Role
    - [+/-] COO [Edit](#) | [Del](#) | [Assign](#)
      - [+/-] Add Role
    - [+/-] owner [Edit](#) | [Del](#) | [Assign](#)
      - [+/-] Add Role

## Users

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps,

managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access.

## Create User

### Creating Owner 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 : shah
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.

The screenshot shows the Salesforce User Detail page for a user named "Vicky Shah". The top navigation bar includes "SETUP" and "Users". The main header displays the user's name "Vicky Shah" and a "User Profile Help for this Page" link. Below the header, the "User Detail" section contains various configuration fields:

User Detail	
Name	Vicky Shah
Alias	vicky
Email	<a href="#">buvasingh05@gmail.com</a> [Verify]
Username	buvasingh05@gmail.com
Nickname	vickys
Title	
Company	
Department	
Division	
Address	
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Locale	English (India)
Language	English
Delegated Approver	
Manager	
Receive Approval Request Emails	Only if I am an approver
Federation ID	
Role	owner
User License	Salesforce
Profile	Standard User
Active	<input checked="" type="checkbox"/>
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>
Site.com Publisher User	<input type="checkbox"/>
WDC User	<input type="checkbox"/>
Mobile Push Registrations	<a href="#">View</a>
Data.com User Type	<a href="#">View</a>
Accessibility Mode (Classic Only)	<input type="checkbox"/> <a href="#">View</a>
Debug Mode	<input type="checkbox"/> <a href="#">View</a>
High-Contrast Palette on Charts	<input type="checkbox"/> <a href="#">View</a>

## Creating Agent User

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 : sharma
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 : standard platform user.

The screenshot shows the Salesforce 'Users' page. At the top, there's a blue header bar with the 'SETUP' icon and the word 'Users'. Below it, a sub-header shows 'User Ram Sharma'. A link to 'User Profile' is on the right. The main section is titled 'User Detail' with tabs for 'Edit', 'Sharing', 'Reset Password', 'Freeze', and 'View Summary'. The 'Edit' tab is active. The user details are listed in two columns:

Name	Ram Sharma	Role	Agent
Alias	rshar	User License	Salesforce Platform
Email	<a href="#">buvansingh05@gmail.com</a> [Verify]	Profile	Standard Platform User
Username	buvansingh05@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	rsharma	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>

## Flows

In Salesforce, a flow is a powerful tool that allows you to automate business processes, collect and update data, and guide users through a series of screens or steps. Flows are built using a visual interface and can be created without any coding knowledge.

In Salesforce, "flows" typically refer to Salesforce Flow, which is a powerful automation tool that allows you to create custom, automated processes in your Salesforce org without writing code.

Salesforce Flow is a point-and-click tool that enables you to design and automate complex business processes, collect data, and interact with users in a visual interface.

There are different types of flows in Salesforce, including:

**Screen Flows:** These are used to guide users through a series of screens to collect display information. Screen Flows are often used for data entry and updates.

**Autolaunched Flows:** These are flows that are triggered by events, such as when a record is created or updated. They don't require user interaction and can be used for background automation.

**Flow Builder:** Flow Builder is the visual interface used to create flows. It allows you to design flows by adding elements, like screens, logic, and actions, using a drag-and-drop approach.

**Flow Templates:** Salesforce provides a library of pre-built flow templates that you can use as a starting point for your own flows. These templates cover a variety of use cases, from simple to complex.

**Scheduled Flows:** These are flows that you can schedule to run at specific times or intervals. They are often used for automating recurring tasks.

**Flow Elements:** Flow Builder offers various elements that you can use to create flows, such as variables, decisions, loops, and more. These elements allow you to build sophisticated logic into your flows.

**Subflows:** Subflows are reusable flow elements that you can incorporate into multiple flows, making it easier to manage and maintain complex processes. **Record-Triggered Flows:** These are flows that are triggered when records meet specified criteria. They are often used for automating record updates and related actions.

### **Why do we need to create a flow:**

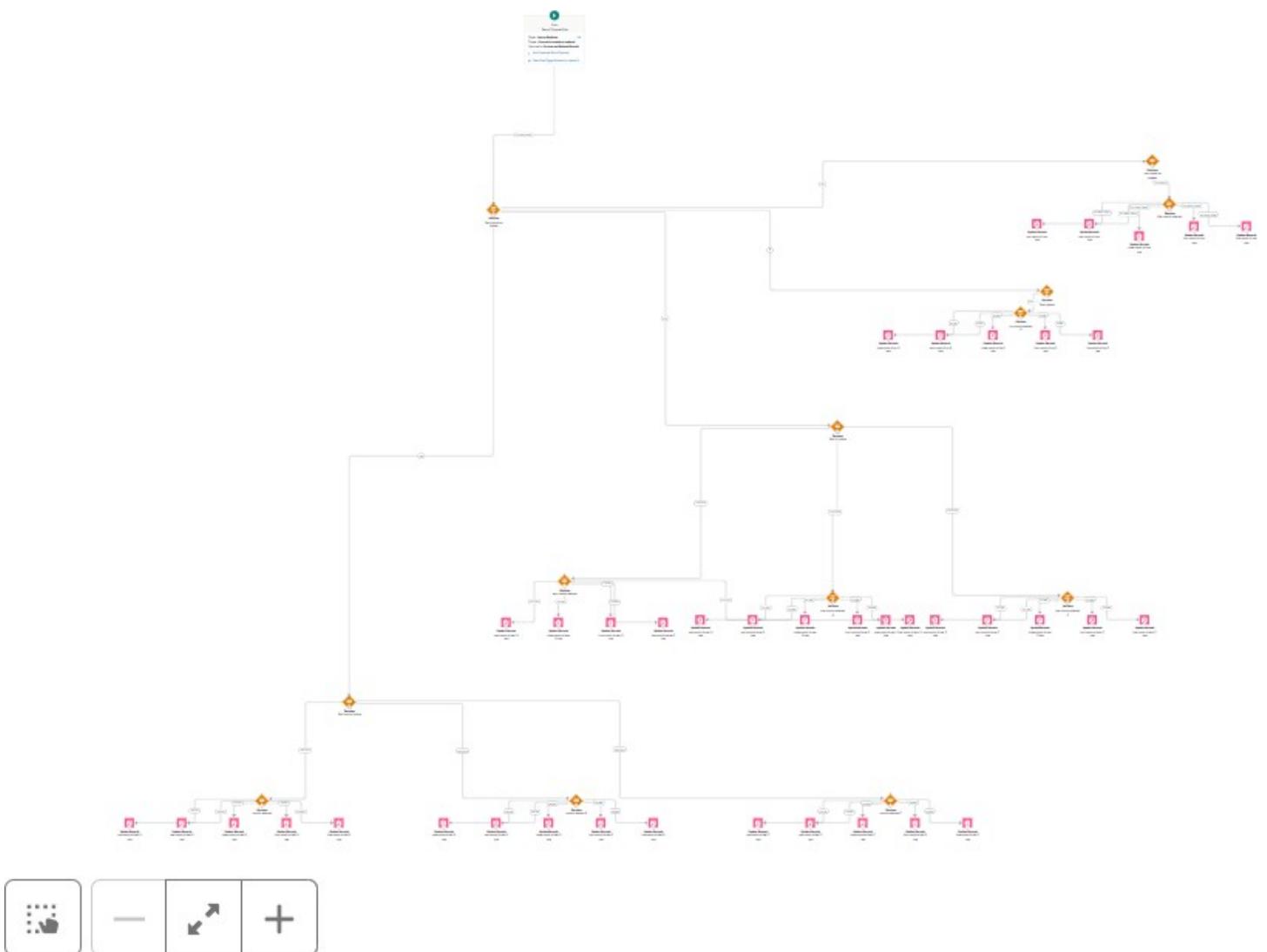
To get the Amount Field automatic by the selection of laptop types the Amount is generated Automatically in the amount field.

## **Create a Flow on dell laptop**

1. Go to Setup and type "Flow" in the Quick Find box.
2. Select "Flow" and click "New Flow".
3. Choose "Record-Triggered Flow" and click "Create".
4. Select "Laptop Booking" from the object dropdown.
5. Set the trigger as "A record is Created or Updated".
6. Optimize the flow for "Actions and Related Records".
7. Click "+" under the flow canvas and select "Decision".
8. Set the label to "Update" (API name auto-generates).
9. Add outcomes for Dell, Acer, HP, and Mac.
10. After the laptop model decision, add another decision for core type (i3, i5, i7).

11. Define conditions for core types (e.g., "core type equals i3").
12. Add outcomes for Dell core types (i3, i5, i7).
13. After core type decision, add another decision for months (1-5).
14. Set conditions for months (e.g., "how many months equals 1").
15. Add outcomes for months selected (1, 2, 3, 4, 5).
16. Add an "Update Record" action based on month selection.
17. Set Amount\_\_c values for Dell i3 (1000, 2000, etc.).
18. Repeat the process for Dell i5 and i7 with corresponding amounts.
19. Connect outcomes to the appropriate update record actions.
20. Save and activate the flow.

**\*\*Similarly we did for remaining laptops also\*\*Final Flow:**



## Apex

### Creating Classes :

Apex classes are modeled on their counterparts in Java. You'll define, instantiate, and extend classes, and you'll work with interfaces, Apex class versions, properties, and other related class concepts.

- Class:** As in Java, you can create classes in Apex. A class is a template or blueprint from which objects

- are created. An object is an instance of a class.
2. **Object:** Object is an instance of a class, where it can access all the properties that are present in a class i.e, variables and methods. Steps to create a class in APEX:

1. Login to the trailhead account and navigate to the gear account in the top right corner.
2. Then we can see the Developer console. Click on the developer console and you will navigate to a new console window.
3. Then you can see many tools in the Toolbar of the new console window. Click on File, New and Apex Class.
4. Enter the name of the class to create a new class file.

### **Apex Trigger code:**

```
trigger LaptopBooking on Laptop_Bookings_c (After insert,after update) {if(trigger.isAfter && ( trigger.isInsert || trigger.isupdate))  
{
```

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

1. LaptopBooking - trigger name

Laptop\_Bookings\_c - as per your org(go to laptop bookings object and copy from that object api name).

### **Apex Class**

```
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 ' +lap.Name +' ,\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 youwith good quality resources. \n Laptop Amount = '+
lap.Amount_c + '\n core type
= '+lap.Processors_c + '\n Laptop type = '+lap.Laptop_names_c;email.setPlainTextBody(body);
        Messaging.sendEmail(new List<Messaging.SingleEmailMessage>{email});
    }
}
}

```

1. Class name:- LaptopBookingHandler
2. API Name:- Laptop\_Bookings\_c(as per your org go to laptop booking object andcopy 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.

## Reports

Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, andshare the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics.

In Salesforce.com we can easily generate reports in different styles. And can createreports in a very short time and also schedule the reports. Salesforce provides a powerful suit of analytic tools to help you organize, view and analyze your data.

Types of Reports in Salesforce :

1. **Tabula Reports:** Simple listing of data without any subtotals. This type of reports provide you most basically to look at your data. Use tabular reports when you want a simple list or a list of items with a grand total.

Example: This type of reports are used to list all accounts, List of contacts, List ofopportunities.....etc.....

2. **Summary Reports:** This type of reports provide a listing of data with groupings and sub totals. Use summary reports when you want subtotals based on the valueof a particular field or when you want

to create a hierarchically grouped report, such as sales organized by year and then by quarter.

Example: All opportunities for your team sub totaled by Sales Stage and Owner.

3. **Matrix Reports:** This type of reports allow you to group records both by row and by column. A comparison of related totals, with totals by both row and column. Use matrix reports when you want to see data by two different dimensions that aren't related, such as date and product.

Example: Summarize opportunities by month vertically and by account horizontally.

4. **Joined Reports:** Blocks of related information in a single report. This type of reports enable you to adopt five different blocks to display different types of related data. Each block can own unique columns, summary fields, formulas, filters and sort order. Use joined reports to group and show data from multiple report types in different views.

Example: You can build a report to show opportunity, case and activity data for your accounts.

## Create Report

- a. Go to the app -click on the reports tab
- b. Click New Report.
- c. 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.
- d. Customize your report
- e. Add fields from left pane as shown below
- f. Click the column drop down and select bucket list.
- g. Follow the picture and save or run it.

The screenshot shows a Report Builder interface with the following details:

- Top Bar:** Includes a search bar, a star icon, a plus icon, a question mark, a gear icon, a bell icon with a red notification count (12), and a user profile icon.
- Section Headers:** "LAPTOP RENTALS", "Total Laptops", "consumer", "Billing Process", "Laptop Bookings", and "Report Builder".
- Report Type:** "REPORT" with a dropdown menu showing "consumer with laptops and total laptops" and "consumer with Laptop Bookings and Total Laptops".
- Buttons:** "Add Chart", "Save & Run", "Save", "Close", and "Run".
- Left Sidebar (Outline):**
  - "Groups": "GROUP ROWS" (with "Add group...") and "types of version" (with "X").
  - "Columns": "Add column..." and "consumer: consumer\_name" (with "X").
  - Other columns listed: "Laptop Bookings: Laptop Bookings" (with "X"), "Total No Of Laptops: Total Laptops" (with "X"), "Laptop names" (with "X"), "Processors" (with "X"), and "# Amount" (with "X").
- Table Data:**

	types of version ↑	consumer: consumer_name	Laptop Bookings: Laptop Bookings	Total No Of Laptops: Total Laptops	Laptop names	Processors	Amount ↓
intermediate (1)	Buvan	Student bookings	1	Dell	core i3	₹1,000	
							₹1,000
<b>Subtotal</b>							
High (4)	Devara	Employee	10	Mac	Bionic chip	₹6,800	
	Jyothendra	Others	2	HP	core i5	₹3,400	
	Charan	Others	3	Dell	core i5	₹2,500	
	Aloo Arjun	Employee	20	HP	core i5	₹1,700	
<b>Subtotal</b>							₹14,400
<b>Total (5)</b>							₹15,400
- Bottom Tools:** Row Counts, Detail Rows, Subtotals, Grand Total, and Conditional Formatting.

## Dashboards

Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities. Before building, reading, and sharing dashboards, review these dashboard basics.

### 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.



Search...



LAPTOP RENTALS

Total Laptops ▾

consumer ▾

Laptop Bookings ▾

Billing Process ▾

\* consumer with laptops and...



\* data analytics of laptops ▾ X



Dashboard

## data analytics of laptops

total amount of data in dashboards

As of 20-Nov-2024, 7:00 pm·Viewing as Sai Radha Krishna Alluri

Refresh

Edit

Subscribe



### consumer with laptops and total laptops

Sum of Amount



[View Report \(consumer with laptops and total laptops\)](#)