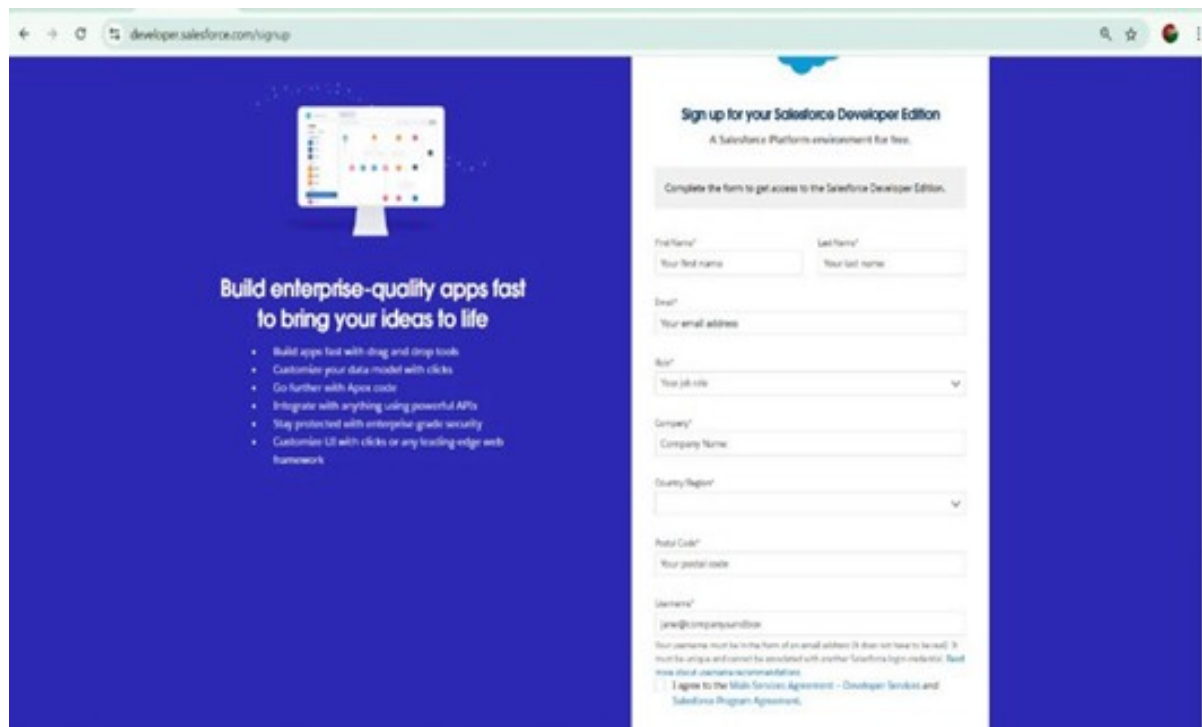


CRM APPLICATION FOR LAPTOP RENTALS CRM

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.



The image shows a web browser window with the URL `developer.salesforce.com/signup`. The page has a dark blue header and a light blue background. On the left, there is a section titled "Build enterprise-quality apps fast to bring your ideas to life" with a list of bullet points: "Build apps fast with drag-and-drop tools", "Customize your data model with clicks", "Go further with Apex code", "Integrate with anything using powerful APIs", "Stay protected with enterprise-grade security", and "Customize UI with clicks or any leading-edge web framework". On the right, there is a sign-up form titled "Sign up for your Salesforce Developer Edition" with the subtitle "A Salesforce Platform environment for free." The form includes fields for "First Name", "Last Name", "Email", "Role", "Company", "Country/Region", "Postal Code", and "Username". Below the form, there is a checkbox for "I agree to the Master Services Agreement - Developer Services and Salesforce Program Agreement".

developer.salesforce.com/signup

Sign up for your Salesforce Developer Edition

A Salesforce Platform environment for free.

Complete the form to get access to the Salesforce Developer Edition.

First Name* Your first name

Last Name* Your last name

Email* Your email address

Role* Your job role

Company* Company Name

Country/Region*

Postal Code* Your postal code

Username* jared@compansys.com

Your username must be in the form of an email address (it does not have to be real). It must be unique and cannot be associated with another Salesforce login identifier. Read more about username recommendations.

☐ I agree to the Master Services Agreement - Developer Services and Salesforce Program Agreement.

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.

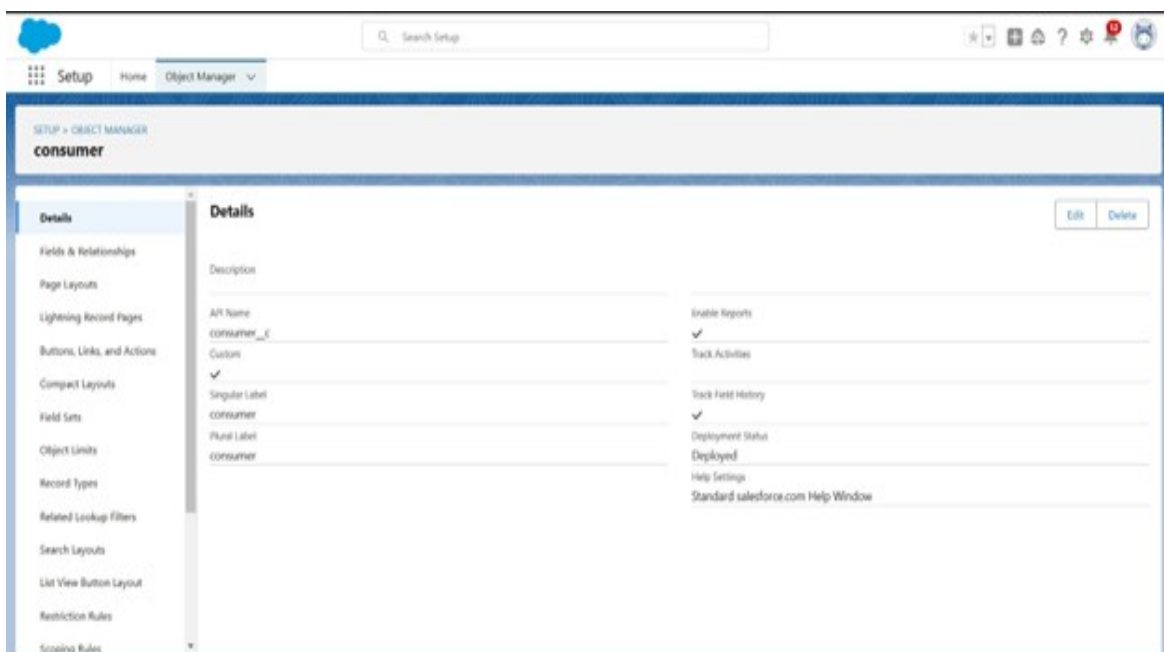
The screenshot shows the Salesforce Object Manager interface for a custom object named 'Total Laptops'. The top navigation bar includes the Salesforce logo, a search bar, and various utility icons. The main header shows 'SETUP > OBJECT MANAGER' and 'Total Laptops'. On the left, a sidebar lists configuration options: Details (selected), 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 'Details' section on the right contains the following fields:

| Field | Value |
|---------------------|-------------------------------------|
| Description | |
| API Name | Total_Laptop__c |
| Custom | <input checked="" type="checkbox"/> |
| Singular Label | Total Laptops |
| Plural Label | Total Laptops |
| Enable Reports | <input checked="" type="checkbox"/> |
| Track Activities | <input checked="" type="checkbox"/> |
| Track Field History | <input checked="" type="checkbox"/> |
| Deployment Status | Deployed |
| Help Settings | Standard salesforce.com Help Window |

Buttons for 'Edit' and 'Delete' are located in the top right corner of the details section.

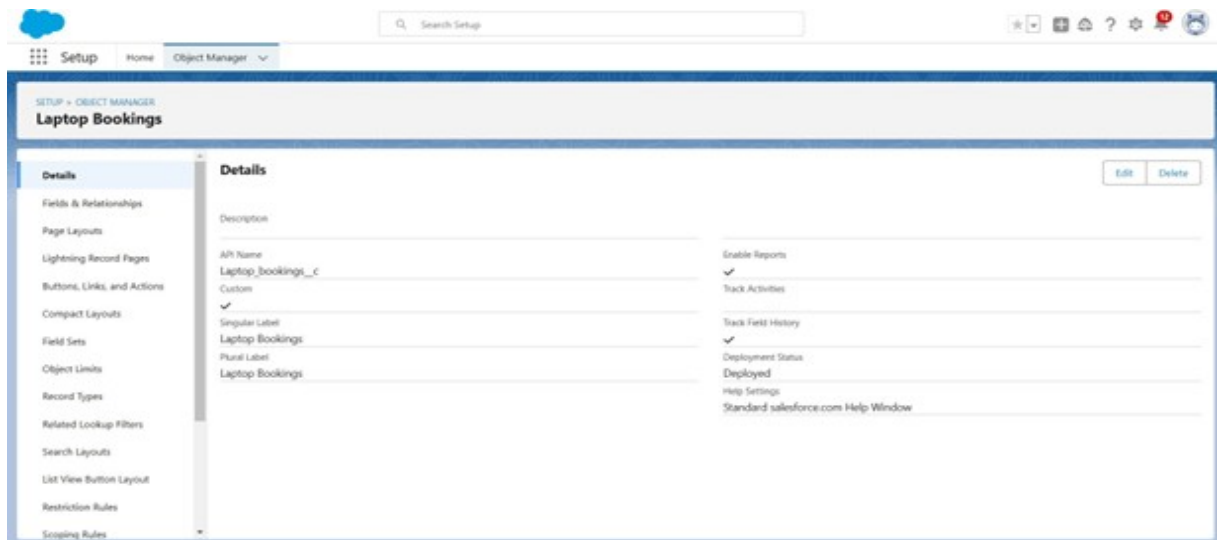
Create consumer Object

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



Create Laptop Bookings Object

- From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
- Enter the label name >> Laptop bookings
- Plural label name >> Laptop bookings
- 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.



Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER

Laptop Bookings

Details Edit Delete

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

Description

API Name
Laptop_bookings__c

Custom

Singular Label
Laptop Bookings

Plural Label
Laptop Bookings

Enable Reports
✓

Track Activities

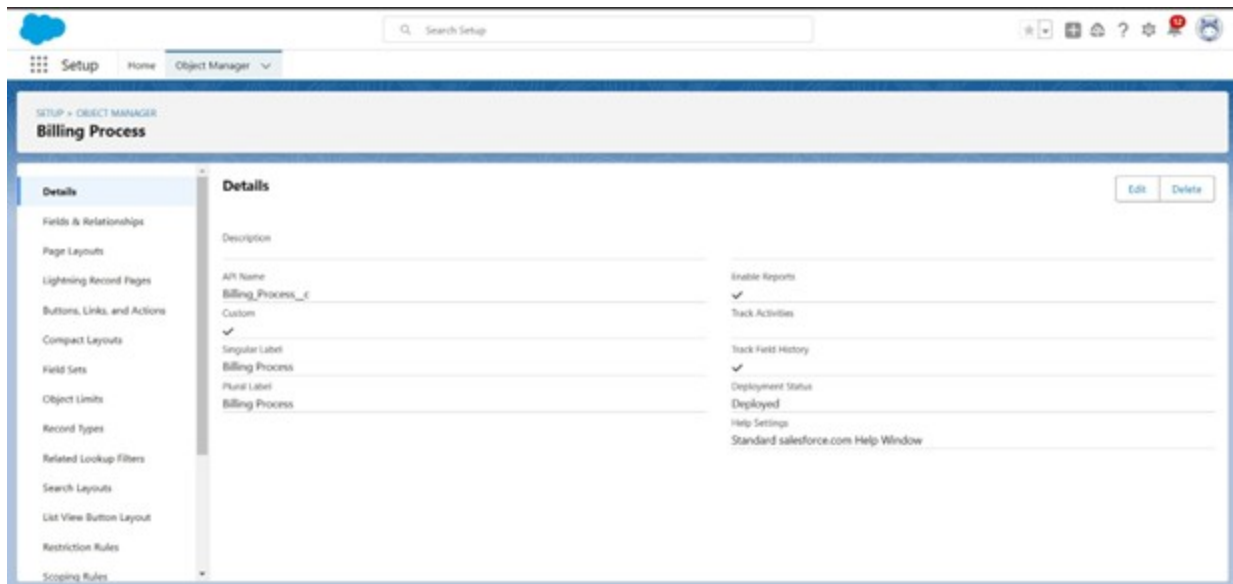
Track Field History
✓

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Create Billing Process Object

- From the setuppage >> Clickon Object Manager>> Click on Create >> Click on Custom Object.
- Enter the label name >> Billing process
- Plural label name >>Billing process
- Enter Record Name Label and Format Record Name >>consumer_name Data Type >> Name
- Click on Allow reports,Allow search and TrackField History,
- Allow search >> Save.



Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER

Billing Process

Details Edit Delete

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

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

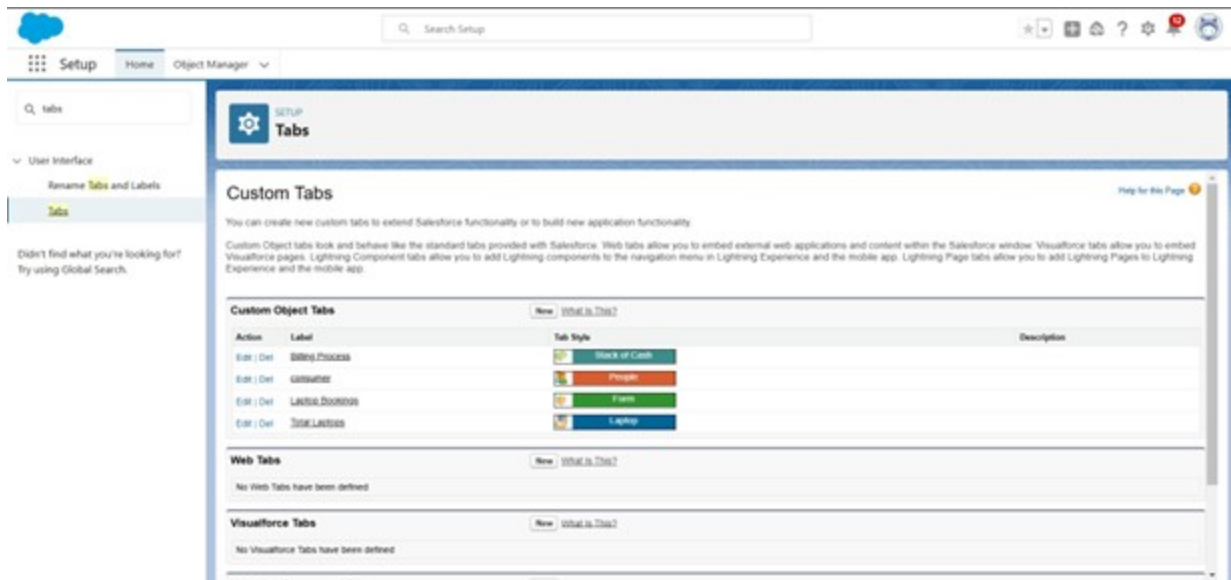
What is Tab: A tab is like a user interface that is used to build records for objects and to view the records in the objects.

Types of Tabs:

- **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.
- **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.
- **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.
- **Lightning Component Tabs:** Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app.
- **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:

- Go to setup page >> Type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)
- 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.
- Make sure that the Append tab to users' existing personal customizations is checked.
- Click save.



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:

- Go to setup page >> search "app manager" in quick find >> select "app manager"
- >> click on New lightning App.
- 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.
- Upload a photo that is related to your app.
- 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 Roles: Search roles (System administrator) in the search bar >> click on the arrow button >> save & finish.

Fields

When we talk about Salesforce, Fields represent the data stored in the columns of a relational database. It can also hold any valuable information that you require for a specific 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 predefined fields in Salesforce that perform a standard task. The main point is that you can't simply delete a Standard Field until it is a non-required standard field. Otherwise, users have the option to delete them at any point from the application freely.

Moreover, we have some fields that you will find common in every Salesforce application. They are,

- >> Created By
- >> Owner
- >> Last Modified
- >> 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 organization 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.

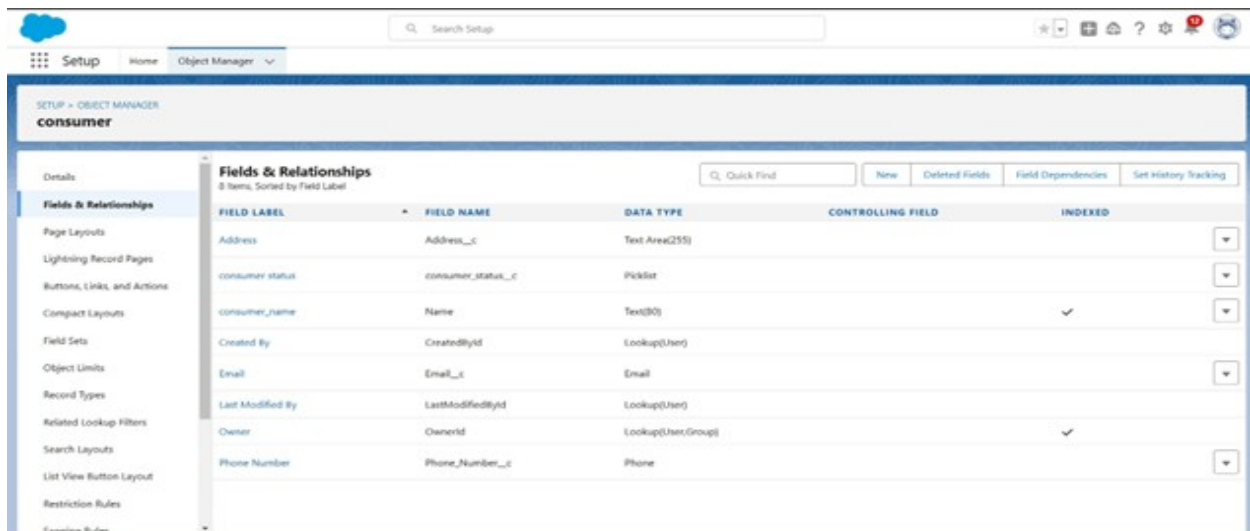
Creating the field in consumer object

To create fields in an object:

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



Creating the field in Laptops Bookings object 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. Picklist values are:-1.Dell 2.Acer 3.Hp 4.Mac
5. Select required
6. Click on Next >> Next >> Save and new

SETUP > OBJECT MANAGER
Laptop Bookings

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules

Field Label:

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

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

Field Name:

Description:

Help Text:

Previous Next Cancel

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”

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

Field Label:

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

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

Field Name:

Description:

Help Text:

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

Picklist values are:- 1. core i3 2. Core i5 3

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

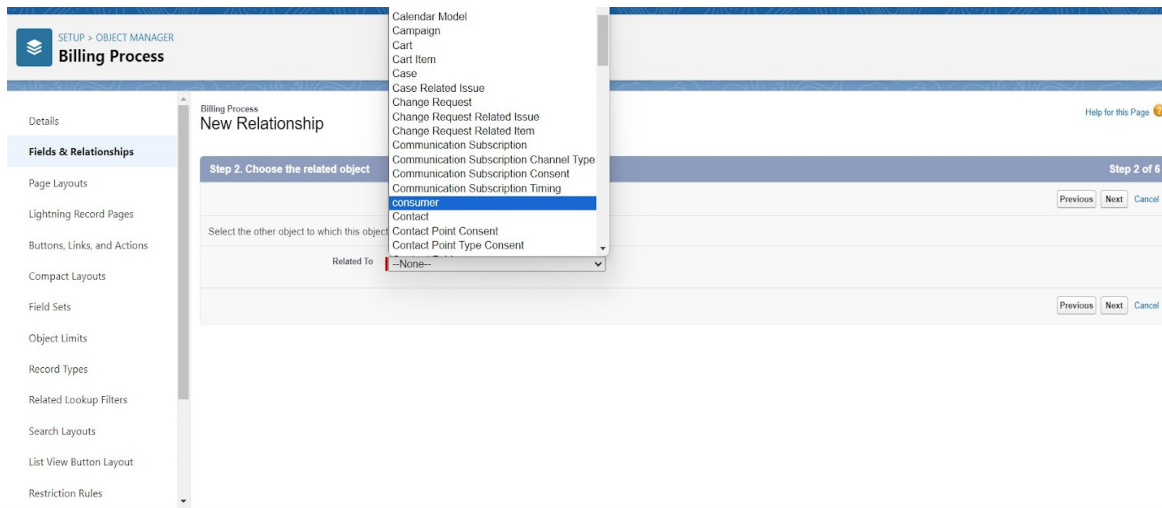
The screenshot shows the 'Edit Field Dependency' page in Salesforce Setup. The page has a sidebar with navigation links like 'Setup Home', 'Service Setup Assistant', 'Commerce Setup Assistant', 'Hyperforce Assistant', 'Release Updates', 'Lightning Experience Transition Assistant', 'Salesforce Mobile App', 'Lightning Usage', 'Optimizer', 'Sales Cloud Everywhere', 'ADMINISTRATION', 'Users', 'Data', 'Email', 'PLATFORM TOOLS', and 'Subscription Management'. The main content area is titled 'Edit Field Dependency' and includes a 'Save' button, a 'Cancel' button, and a 'Preview' button. Below these are instructions on how to use the 'Include Values' and 'Exclude Values' buttons. The main table shows the relationship between 'Laptop names' and 'Processors'. The 'Laptop names' column has values 'Dell', 'HP', 'Mac', and 'Acer'. The 'Processors' column has values 'core i3', 'core i5', 'core i7', and 'Bionic chip'. The table is divided into four sections, one for each laptop brand. The 'Dell' section shows 'core i3', 'core i5', and 'core i7'. The 'HP' section shows 'core i3', 'core i5', and 'core i7'. The 'Mac' section shows 'core i3', 'core i5', and 'core i7'. The 'Acer' section shows 'core i3', 'core i5', and 'core i7'. The 'Bionic chip' is listed under each brand. The page includes instructions on how to use the 'Include Values' and 'Exclude Values' buttons to manage the dependency. A legend indicates that yellow cells represent 'Included Value' and white cells represent 'Excluded Value'.

Click the include value for dell-core i3,i5,i7 and for acer i3,i4,i5 and for hp i3,i4,i5 and also for mac bionic chip include the values for it.

To Create a Fields & Relationship for 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 "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. Change the Field Label: Name
7. click on Next >> Next >> Save and new



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

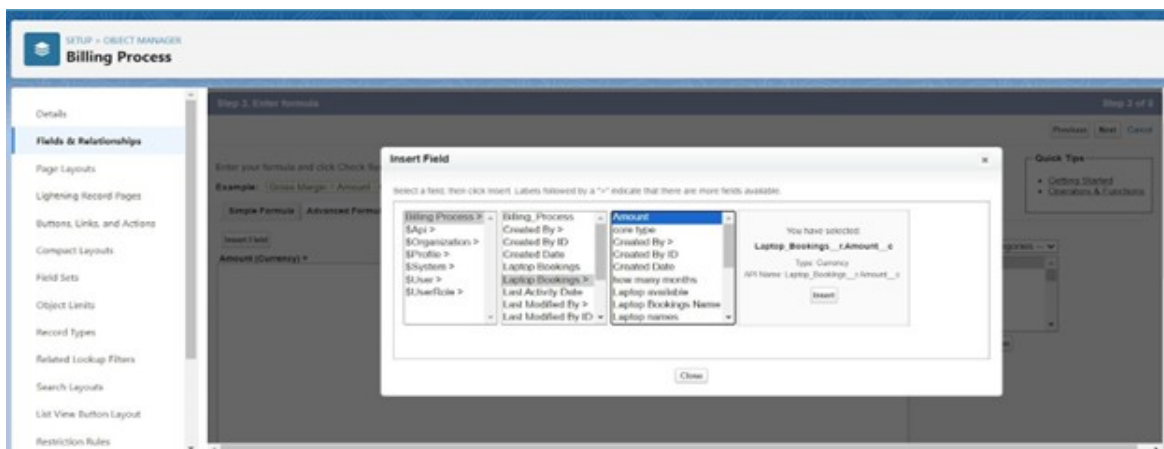
1. Go to setup >> click on Object Manager >> type object name(Billing Process) in the search bar >> click on the object.
2. Now click on "Fields& Relationships" >>New
3. Select Data Type as a "Picklist"
4. Fill the Aboveas following:
5. Field Label:Payment Mode
6. Value >> Select enter values with each value separated by a new line
7. Cash
8. Check
9. Credit card
10. Debit card
11. UPI
12. Phonepe
13. Gpay
14. Paytm

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 FormulaClick on the Insert fieldin 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 field



Creating the field in Total Laptopsubject

1. To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Total Laptops) in 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 Aboveas following:
5. Field Label: LaptopsAvailable
6. Field Name : It's gets auto generated
7. Select the FormulaReturn Type as “Number”
8. Select the decimal places as "0" and click next

SETUP > OBJECT MANAGER
Total laptops

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

Select one of the data types below.

- ☐ None Selected
- ☐ Checkbox
- ☐ Currency
- ☐ Date
- ☐ Date/Time
- ☒ Number
- ☐ Percent
- ☐ Text
- ☐ Time

Options

Decimal Places: 0 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 validation rule triggers an error message and prevents the user from saving the record until the issues are resolved.

Improve the quality of your data using validation rules. Validation rules verify that the data a user enters in a record meets the standards you specify before the user can 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 rule returns a value of “True” due to an invalid value.

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.
6. Save the validation rule

The screenshot shows the Salesforce Setup page for the 'consumer' object. The left sidebar contains a navigation menu with the following items: 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, and Restriction Rules. The main content area is titled 'consumer' and displays the validation rule configuration. The 'Details' section shows the rule name 'Phonenumberoremailblankrule' and the description 'phone number and email number should not be blank'. The formula is entered as 'OR(ISBLANK(phone_number__c) , ISBLANK(email__c))'. The 'Error Message' section shows the example message 'Discount percent cannot exceed 30%' and the error message 'Please fill the phone number and email id'. The 'Error Location' is set to 'Top of Page'.

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

Display an error if Discount is more than 30%

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

Insert Field Insert Operator

OR(ISBLANK(phone_number__c) , ISBLANK(email__c))

Check Syntax No errors found

Functions

All Function Categories

ABS

ACOS

ADDMONTHS

AND

ASCII

ASIN

Insert Selected Function

ABS(number)

Returns the absolute value of a number, a number without its sign

Help on this function

Error Message

Example: Discount percent cannot exceed 30%

This message will appear when Error Condition formula is **true**

Error Message: Please fill the phone number and email id

This error message can either appear at the top of the page or below a specific field on the page

Error Location: ☒ Top of Page ☐ Field

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, RecordTypes, 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.

- Contract Manager
- Read Only
- Marketing User
- Solutions Manager
- Standard User
- 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 , LaptopBooking and BillingProcess objects as mentioned in the below diagram.

Give access and save

The screenshot shows the Salesforce Setup interface for the 'Owner' profile. The left sidebar contains navigation links for 'Setup', 'Home', and 'Object Manager'. The main content area displays the 'Profile: Owner' details. At the top, there's a search bar and a 'Search Setup' button. Below the profile name, there's a description: '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.' A link to 'Edit' is provided. The 'Profile Detail' section shows the profile name 'Owner', user license 'Salesforce', and a 'Custom Profile' checkbox which is checked. The 'Page Layouts' section lists various layouts assigned to the profile, including 'Global Layout', 'Email Application', 'Home Page Layout', 'Account Layout', 'Alternative Payment Method', 'Appointment Invitation', 'Invoice', 'Invoice Line', 'Lead', 'Legal Entity', 'Location', and 'Location Group'. A blue arrow points to the 'Custom Object Permissions' section, which is partially visible at the bottom of the screenshot.

The screenshot shows the 'Custom Object Permissions' section for the 'Owner' profile. A blue arrow points to the 'Custom Object Permissions' section. The table below shows the permissions for various objects:

| | 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 checked="" type="checkbox"/> | <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"/> |
| Laptop Bookings | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Total Laptops | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

Below the table, there are 'Session Settings' and 'Password Policies' sections. The 'Session Settings' section shows 'Session Times Out After' set to '2 hours of inactivity' and 'Session Security Level Required at Login' set to '--None--'. The 'Password Policies' section is partially visible at the bottom.

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)
2. >> Save.
3. While still on the profile page, then click Edit.
4. 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.

Give access and save

The screenshot shows the Salesforce Setup interface for the 'Agent' profile. The left sidebar contains a search bar with 'profil' and a list of items including 'Users' and 'Profiles'. The main content area is titled 'Profile Agent' and includes a 'Help for this Page' link. Below the title, there is a description of the profile and a list of enabled access types. The 'Profile Detail' section shows the profile name 'Agent', user license 'Salesforce Platform', and creation/modification details. The 'Page Layouts' section lists various layouts assigned to the profile, including Global, Email Application, Home Page Layout, Account, and Alternative Payment Method. The URL at the bottom is: <https://pvpst-1c6-dev-ed.develop.my.salesforce.com/one/app#/alohaRedirect/00eN50000031INW1sdtp=p1>

The screenshot shows the 'Custom Object Permissions' and 'Session Settings' sections of the Salesforce Setup interface for the 'Agent' profile. The 'Custom Object Permissions' section includes a table with columns for 'Basic Access' (Read, Create, Edit, Delete) and 'Data Administration' (View All, Modify All) for various objects. The 'Session Settings' section includes fields for 'Session Times Out After' (2 hours of inactivity) and 'Session Security Level Required at Login' (None). The 'Password Policies' section includes fields for 'User passwords expire in' (90 days), 'Enforce password history' (3 passwords remembered), 'Minimum password length' (8), 'Password complexity requirement' (Must include alpha and numeric characters), 'Password question requirement' (Cannot contain password), 'Maximum invalid login attempts' (10), and 'Lockout effective period' (15 minutes).

| Object | 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"/> |
| consumers | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Laptop Bookings | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Total Laptops | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

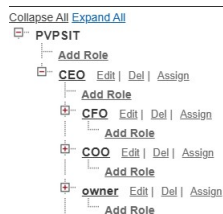
Roles and Hierarchy

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 on Save.



SETUP

Roles

Role Edit

New Role

Help for this Page

Role Edit

Label

owner

Role Name

owner

This role reports to

CEO

Role Name as displayed on reports

Save

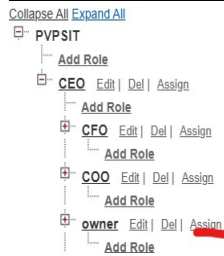
Save & New

Cancel

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.
3. Give Label as "agentand Role name gets auto populated. Then click on Save



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 : Usernameshould be in this form: text@text.text
8. Nick Name : Give a Nickname
9. Role : owner
10. User license : Salesforce
11. Profiles : owner.

User

Vicky Shah

[Permission Set Assignments \(0\)](#) | [Permission Set Assignments: Activation Required \(0\)](#) | [Permission Set Group Assignments \(0\)](#) | [Permission Set License Assignments \(0\)](#) | [Personal Groups \(0\)](#) | [Public Group Membership \(0\)](#) | [Queue Membership \(0\)](#) | [Team \(0\)](#) | [Managers in the Role Hierarchy \(0\)](#) | [OAuth Apps \(0\)](#) | [Third-Party Account Links \(0\)](#) | [Installed Mobile Apps \(0\)](#) | [Authentication Settings for External Systems \(0\)](#) | [Login History \(0+\)](#) | [User Provisioning Accounts \(0\)](#)

User Detail

[Edit](#) [Sharing](#) [Reset Password](#) [Freeze](#) [View Summary](#)

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

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 : Usernameshould 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.

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 or 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:

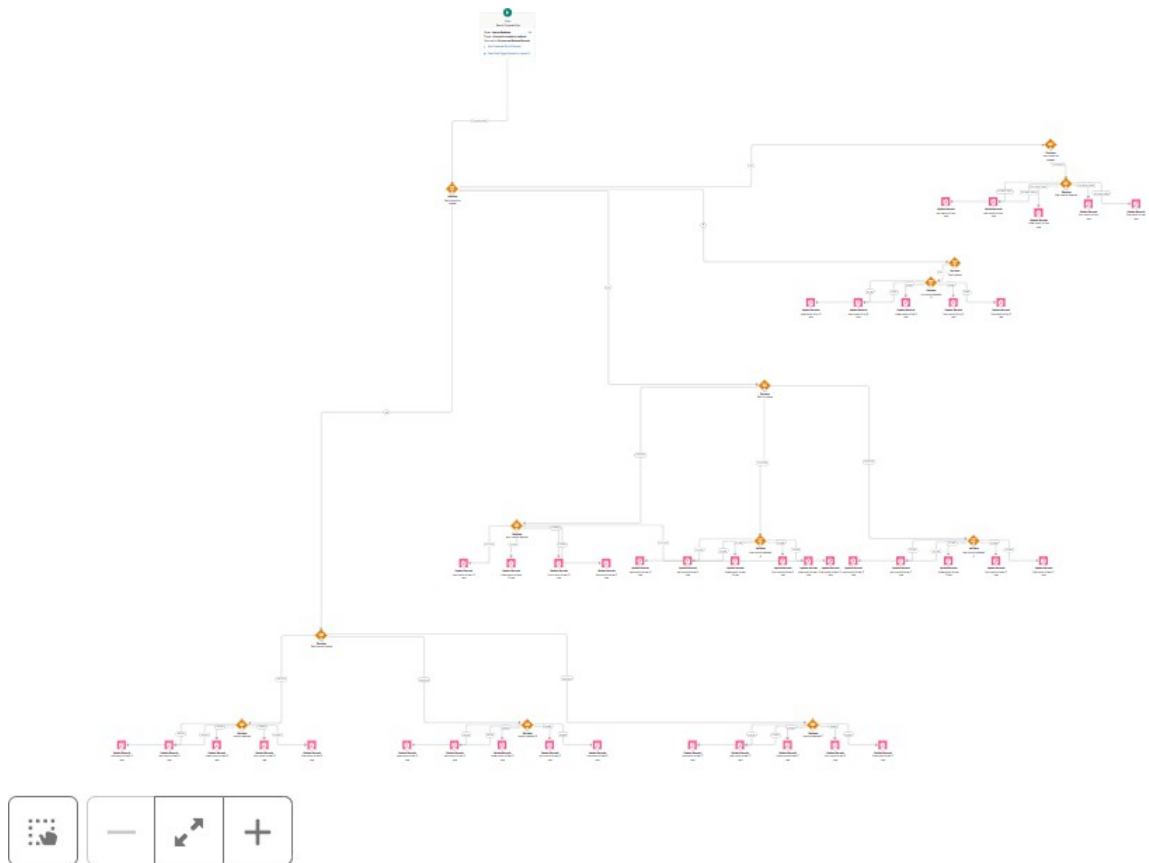
To get the Amount Field automatic by the selection of laptop types the Amount is generated Automatically in the amount field.

Create a Flow on dell laptop

1. Go to Setup and type "Flow" in the Quick Find box.
2. Select "Flow" and click "NewFlow".
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.
- 18.
19. Set Amount__c values for Dell i3 (1000, 2000, etc.).
20. Repeat the process for Dell i5 and i7 with corresponding amounts.
19. Connect outcomes to the appropriate update record actions.
21. Save and activate the flow.

****Similarly we did for remaining laptops also****

Final Flow:



Apex Class

```
public class LaptopBookingHandler {  
    publicstatic 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 Pleasecontinue your journeywith us, whilewe try to provide you  
withgood 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 laptopbooking object and copy from that).
3. core__c (as per your org go to laptopbooking object and copy from that).
- 4.Laptop_type__c.(as per your org go to laptop bookingobject 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, and share 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 create reports 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 :

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 of opportunities.....etc.....

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 value of 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.

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.

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

1. Go to the app -click on the reports tab
2. Click New Report.
3. Select report type from category or from reporttype panel or from search panel
“consumer with Laptop Bookings and total laptops”>> click on start report.
4. Customize your report
5. Add fields from left pane as shown below
6. Click the columndrop down and select bucketlist.

| 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 |
| Subtotal | | | | | | ₹1,000 |
| 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 |
| Subtotal | | | | | | ₹14,400 |
| Total (5) | | | | | | ₹15,400 |

a.

Follow the picture and save or run it.

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 "totalrent amount".
4. Folder unique names will be auto populated.
5. Click save.

