

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.

Creating Developer Account:

Creating a developer org in salesforce.

1. Go to <https://developer.salesforce.com/signup>
2. On the sign up form, enter the following details :
 - 1) First name & Last name
 - 2) Email
 - 3) Role : Developer
 - 4) Company : College Name
 - 5) County : India
 - 6) Postal Code : pin code
 - 7) Username : should be a combination of your name and company

This need not be an actual email id, you can give anything in the format :

username@organization.com

Click on sign me up after filling these.

Account Activation

1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.
2. Click on Verify Account.
3. Give a password and answer a security question and click on change password.
4. Then you will redirect to your salesforce setup page.

Object Creation

What Is an Object?

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

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.

To Navigate to Setup page:

Click on gear icon >> click setup.

To create an object:

1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
1. On Custom object defining page:
 2. Enter the label name, plural label name, click on Allow reports, Allow search.
 3. Click on Save.
 4. Click on Save.

Create Total Laptops Object

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

1) Enter the label name>> Total Laptops

2) Plural label name>> Total Laptops

3) Enter Record Name Label and Format

Record Name >>Total Laptops

Data Type >> Text

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

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

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

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

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

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

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

Tabs

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

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)
1. 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 .
2. Make sure that the Append tab to users' existing personal customizations is checked.
3. Click save.

Activity 2: Creating Remaining Tabs

Now create the Tabs for the remaining Objects, they are “consumer,Laptop Booking,Billing process”.

Follow the same steps as mentioned in Activity -1 .

The Lightning App

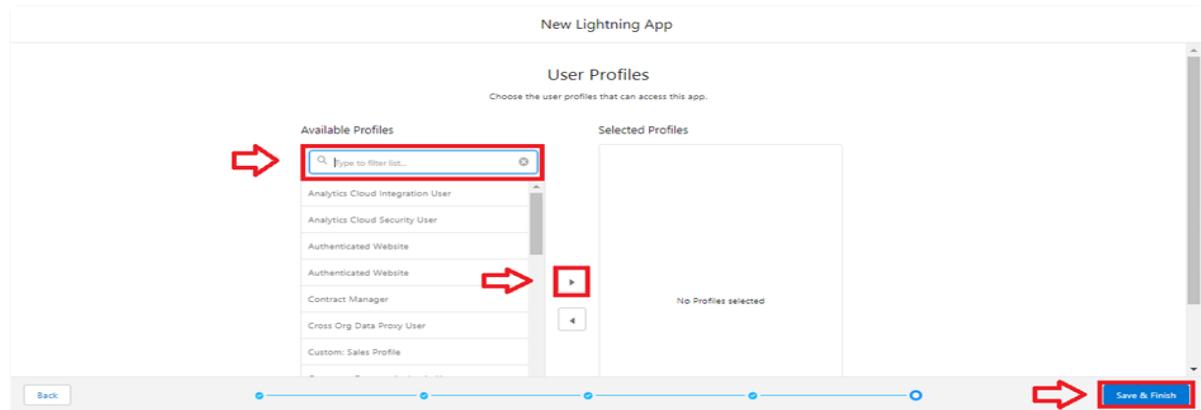
An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

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 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.

Fields:

Creating the field in consumer object

- **1. To create fields in an object:**

- Go to setup >> click on Object Manager >> type object name(consumer) in search bar >> click on the object.
- Now click on “Fields & Relationships” >> New
- Select Data Type as a “Phone”
- Click on next
- Fill the Above as following:
 - Field Label: Phone number
 - Field Name : gets auto generated
 - Click the required option checkbox.
 - Click on Next >> Next >> Save and new.

The screenshot shows the 'Step 2. Enter the details' page for creating a new field in the 'consumer' object. The left sidebar lists various object settings like Details, Fields & Relationships, Page Layouts, etc. The main form has the following fields:

- Field Label:** phone number
- Field Name:** phone_number
- Description:** (empty)
- Help Text:** (empty)
- Required:** Always require a value in this field in order to save a record
- Auto add to custom report type:** Add this field to existing custom report types that contain this entity
- Default Value:** Show Formula Editor
Use formula syntax: Enclose text and picklist value API names in double quotes: ("the_text"), include numbers without quotes (25), show percentages as decimals (0.10), and express date calculations in the standard format (Today) + 7. To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type__mdt.RecordIdName__c

Buttons at the bottom right include Previous, Next, and Cancel.

- **2. To create another fields in an object:**

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

SETUP > OBJECT MANAGER
consumer

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

consumer
New Custom Field

Step 2. Enter the details Step 2 of 4

Field Label Email
Field Name Email
Description
Help Text
Required Always require a value in this field in order to save a record
Unique Do not allow duplicate values
External ID Set this field as the unique record identifier from an external system
Auto add to custom report type Add this field to existing custom report types that contain this entity
Default Value Show Formula Editor

- **3. To create another fields in an object:**

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

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

consumer
New Custom Field

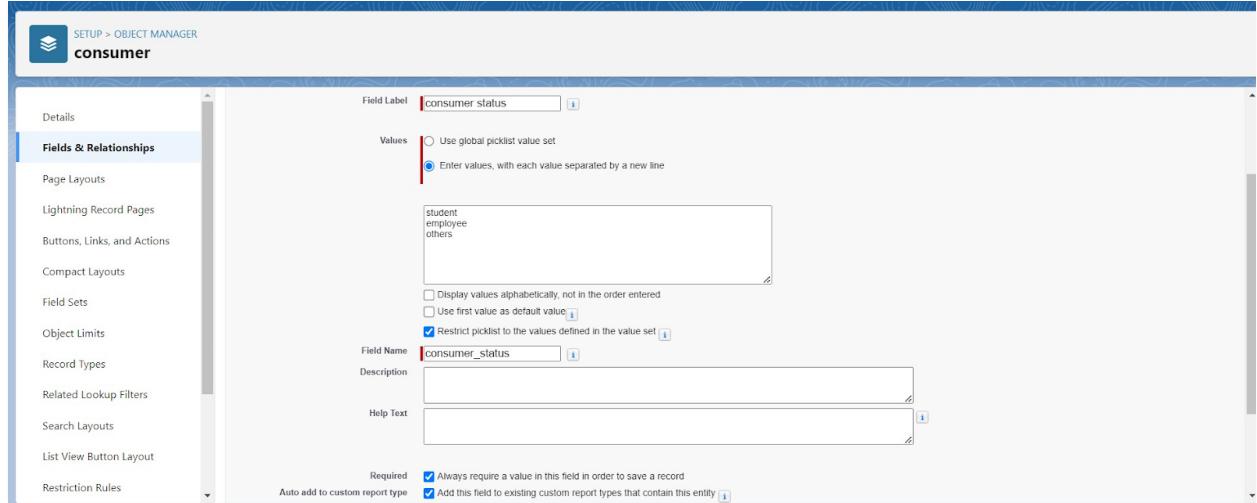
Step 2. Enter the details Step 2 of 4

Field Label Address
Field Name Address
Description
Help Text
Required Always require a value in this field in order to save a record
Auto add to custom report type Add this field to existing custom report types that contain this entity
Default Value Show Formula Editor

- **4. To create another fields in an object:**

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

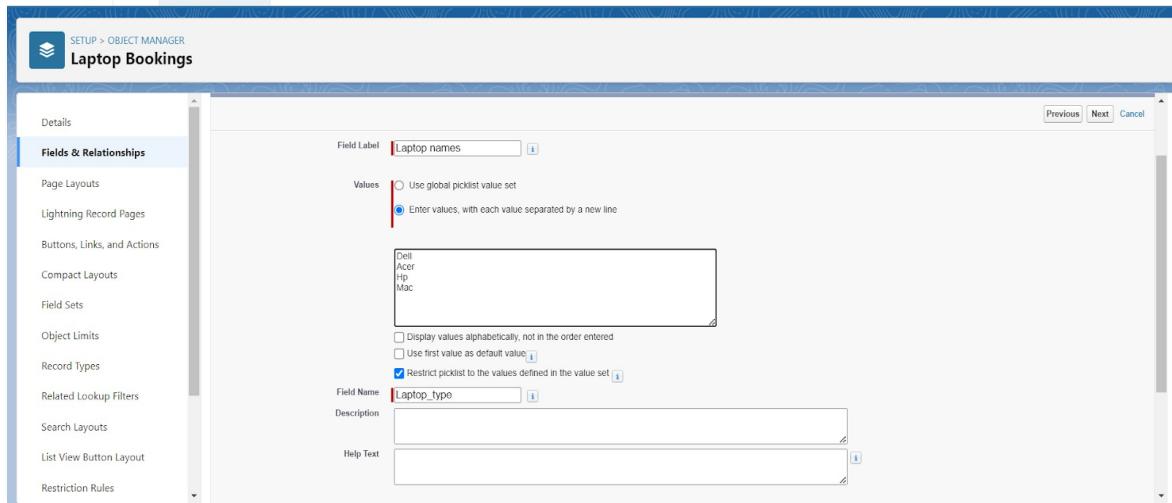
- d. Fill the Above as following:
- Field Label: consumer Status
 - Value - Select enter values with each value separated by a new line
 - a. Student
 - b. Employee
 - c. Others
 - Select required
 - Field Name :It's gets auto generated
 - Click on Next >> Next >> Save and new.



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

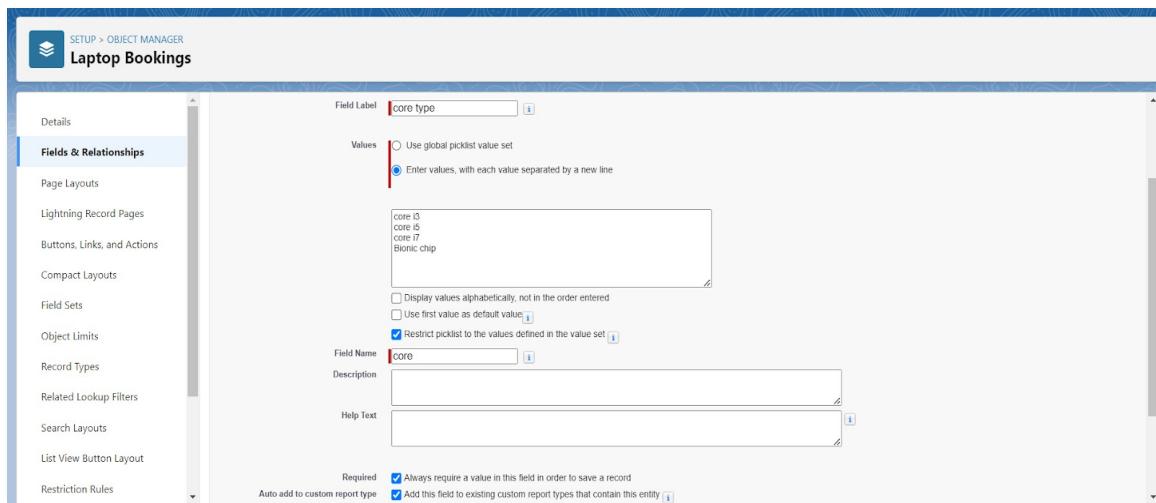


6. Select required
7. Click on Next >> Next >> Save and new

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

NOTE:-

Field Dependency:

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:

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

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.

Laptop names:	Dell	Acer	HP	Mac
core type:	core i3 core i5 core i7	core i3 core i5 core i7	core i3 core i5 core i7	core i3 core i5 core i7 Bionic chip
	Bionic chip	Bionic chip	Bionic chip	Bionic chip

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.

To create fields in an object:

- 1.Go to setup >> click on Object Manager >> type object name(Laptop Booking) in the 2.search bar >> click on the object.
- 3.Now click on “Fields & Relationships” >> New
- 4.Select Data Type as a “Currency”
- 5.Click on Next
- 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 “Lookup Relationship”
4. Click on Next
5. Click on the Related to drop down and Select the “Total Laptops” object and click on Next
 - Fill the Above as following:
 - Change the Field Label: Total No Of Laptops
 - Field Name :It's gets auto generated
 - 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.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar says "SETUP > OBJECT MANAGER" and the page title is "Laptop Bookings". On the left, there's a sidebar with various options like Details, Fields & Relationships (which is selected and highlighted in blue), Page Layouts, Lightning Record Pages, etc. The main content area is titled "Fields & Relationships" and shows a table with 8 items, sorted by Field Label. The table has columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The rows show the following fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Currency(18, 0)		
core type	core__c	Picklist	Laptop names	
Created By	CreatedById	Lookup(User)		
Laptop Bookings Name	Name	Text(80)		✓
Laptop names	Laptop_type__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Master-Detail(consumer)		✓
Total no of laptops	Total_no_of_laptops__c	Master-Detail(Total laptops)		✓

To Create a Rollup Summary Field in “Total Laptops Object”

1. After Creating the Master-Detail Relationship Than Only you can create the Rollup Summary
2. Go to setup >> click on Object Manager >> type object name(Total Laptops) in the search bar >> click on the object.
3. Now click on “Fields & Relationships” >> New

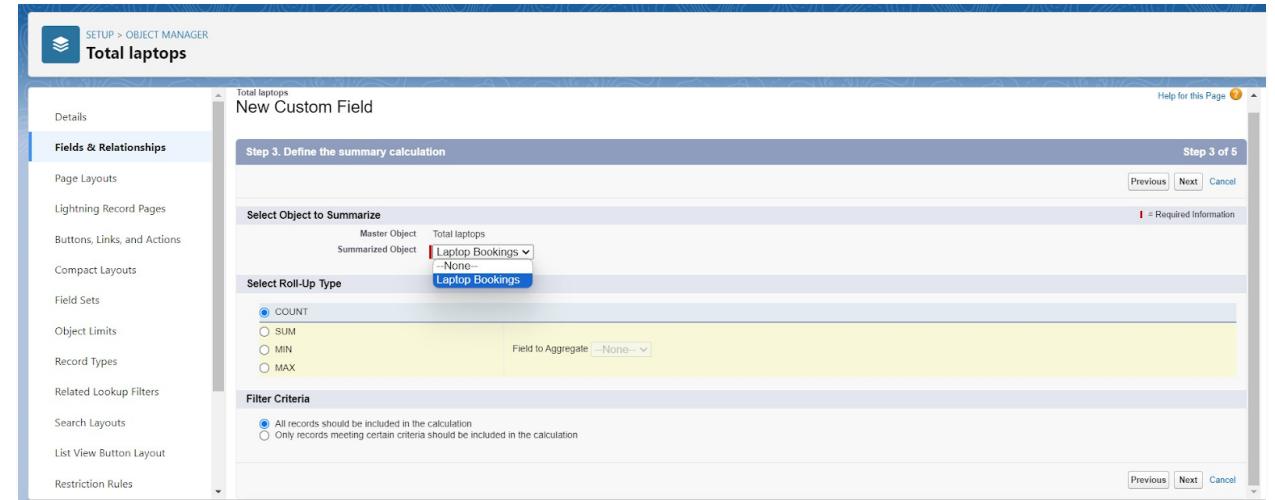
The screenshot shows the 'Object Manager' interface for the 'Total laptops' object. On the left, a sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The main area is titled 'New Custom Field' under 'Step 1. Choose the field type'. It asks to specify the type of information. A 'Data Type' section contains several options: 'None Selected' (selected), 'Auto Number', 'Formula', 'Roll-Up Summary' (selected), 'Lookup Relationship', and 'Master-Detail Relationship'. Each option has a detailed description below it.

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

The screenshot shows the 'Object Manager' interface for the 'Total laptops' object. The sidebar remains the same. The main area is titled 'New Custom Field' under 'Step 2 of 5'. It asks to enter details. The 'Field Label' is set to 'Laptops delivered' and 'Field Name' is set to 'Laptops_delivered'. There are fields for 'Description' and 'Help Text', both currently empty. At the bottom, there are checkboxes for 'Auto add to custom report type' and 'Add this field to existing custom report types that contain this entity'. Navigation buttons 'Previous', 'Next', and 'Cancel' are at the bottom right.

- 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.

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

Laptop Bookings

Fields & Relationships

Laptop available (Number) =
0 - total_no_of_laptops__r.Laptops_delivered__c

Functions

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

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

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.

Laptop Bookings

Fields & Relationships

Values

1
2
3
4
5

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

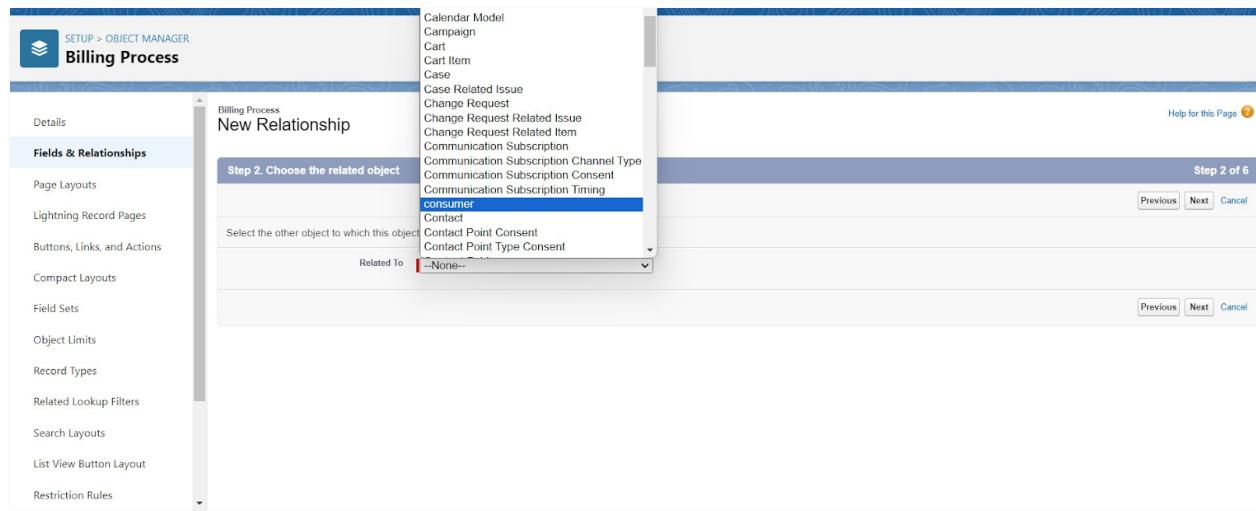
Field Name: how_many_months
Description: how many months
Help Text:
Required: Always require a value in this field in order to save a record
 Auto add to custom report type
 Add this field to existing custom report types that contain this entity

Creation of Fields & Relationship for Billing Process Object

1.

2. 1. To create fields & relationship to 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 “Master-detail Relationship”
- d. Click on Next
- e. Click on the Related to drop down and Select the consumer object and click on Next

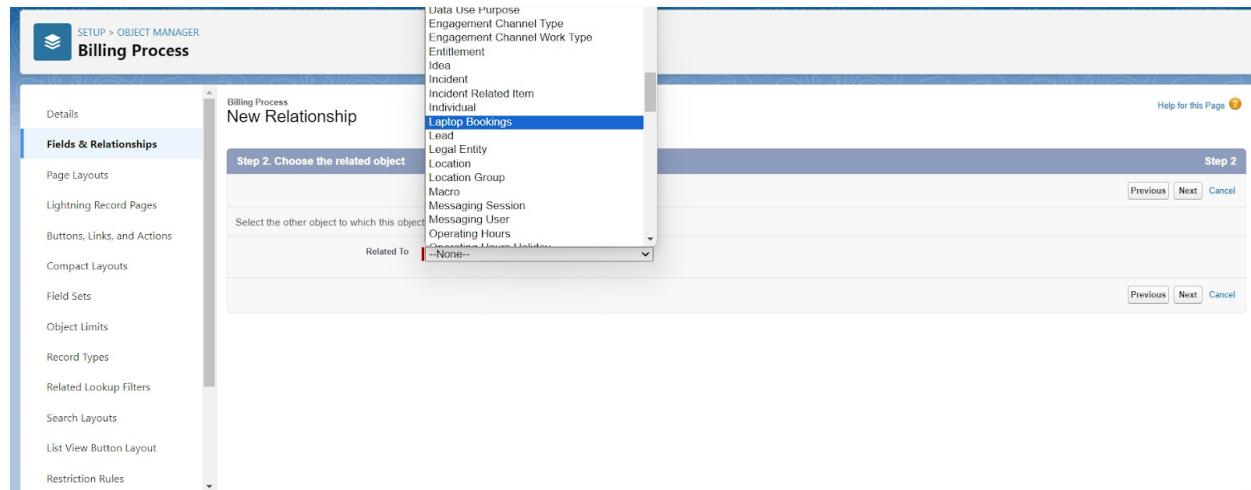


f.

- g. 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:

- 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 “Lookup Relationship”
- d. Click on Next
- e. Click on the Related to drop down and Select the Laptop Booking object and click on Next



f.

- g. Fill the Above as following:
 - Change the Field Label: Laptop Booking
 - Field Name :It's gets auto generated
 - Click on Next >> Next >>Save and new.

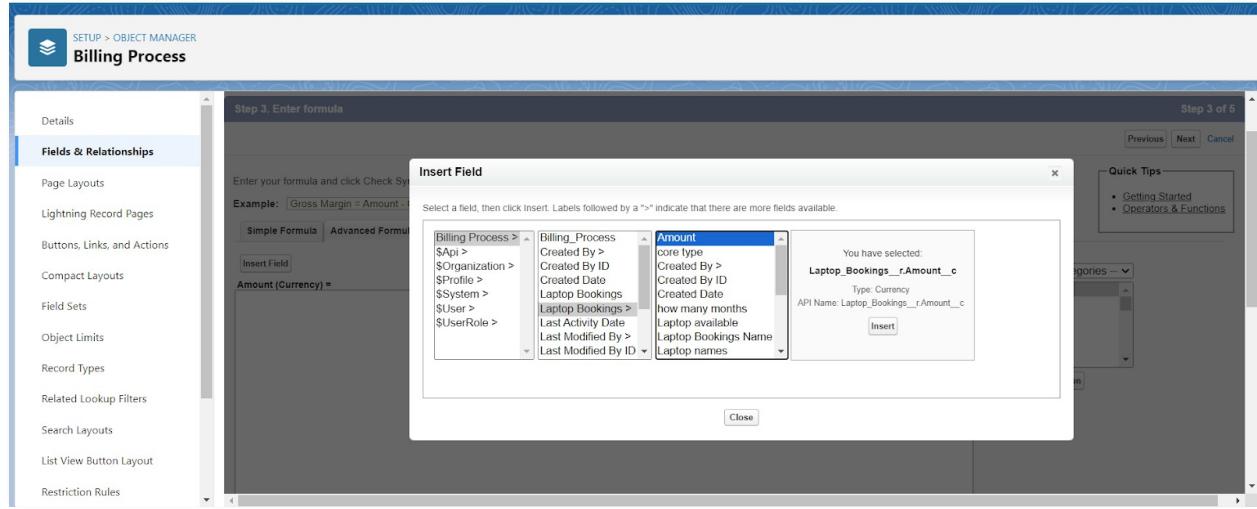
3. 3. Creation of another fields for the billing process object

4. To 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:
 - Field Label: Payment Mode
 - Value >> Select enter values with each value separated by a new line
 - a. Cash
 - b. Check
 - c. Credit card
 - d. Debit card
 - e. UPI
 - f. Phonepe
 - g. Gpay
 - h. Paytm
 - Select required
 - Click on Next >> Next >> Save and new.

4. Create a Cross object formula Field in billing process 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 “Formula”
- d. Click on Next
- e. Enter the Field label: Amount, the Field name gets auto generated and click on Next.(Formula return type Currency).
- f. 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
- g. “Laptop_Booking__r.Amount__c”.
- h. Click on the Check syntax: No syntax errors in merge fields



- i.
- j. Click on Next >> Next >> Save and new.

Creating the field in Total Laptops object

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 Above as following:
5. Field Label: Laptops Available
6. Field Name : It's gets auto generated
7. Select the Formula Return Type as “Number”

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 [\[i\]](#)

Formula Return Type

None Selected
 Checkbox
 Currency
 Date
 Date/Time
 Number
 Percent
 Text
 Time

Select one of the data types below.

Calculate a boolean value
Example: `TODAY()>CloseDate`

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

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

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

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

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

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

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

Options: Decimal Places Example: 999

8. Select the Decimal places as “0” and Click on Next

Note: I am Considering “Total No Of Laptops = 50” While creating a new record in Total Laptops Object.

1. Click on the Advanced
2. Formula “ 50 - Laptops_delivered_c ” and Check Syntax

SETUP > OBJECT MANAGER
Total laptops

Simple Formula | Advanced Formula

Insert Field: Laptops Available (Number) = 50 - Laptops_delivered_c
Insert Operator: [\[i\]](#)

Functions: ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN

Check Syntax: No syntax errors in merge fields or functions. (Compiled size: 36 characters)

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

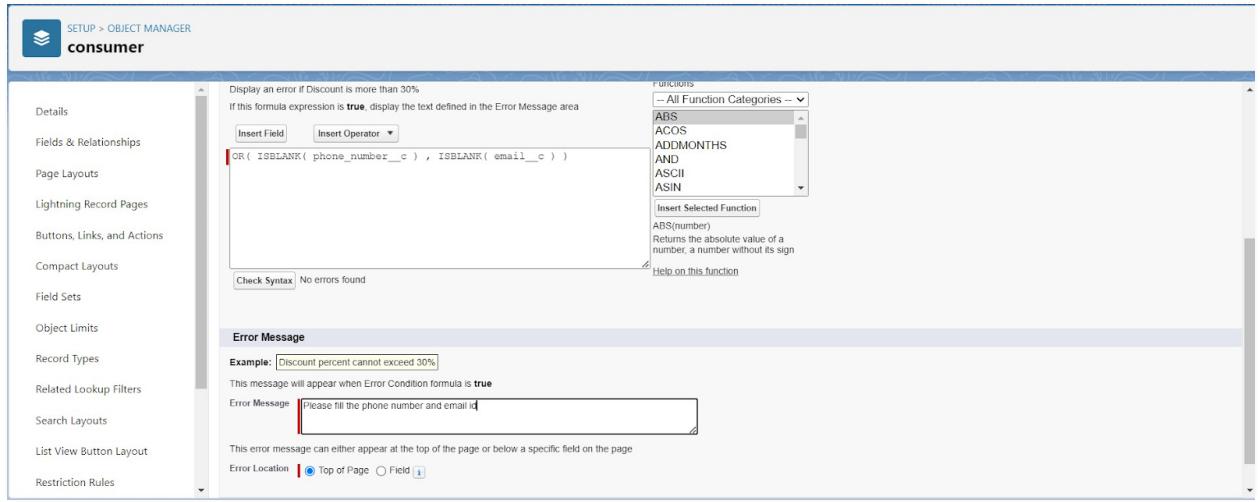
Validation rule

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.
7. Save the validation rule.

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.

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))`

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

Check Syntax No errors found

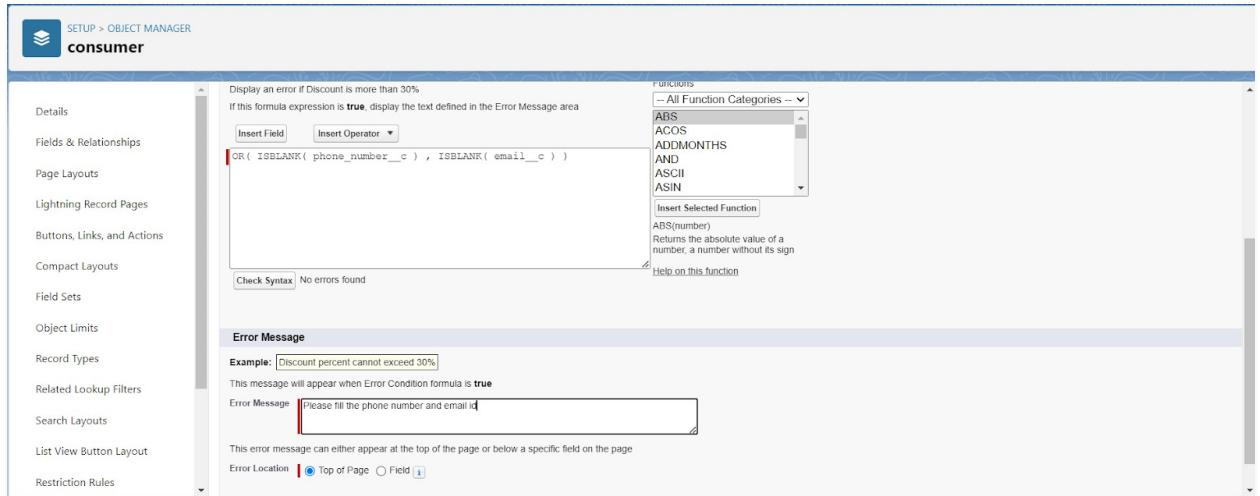
Error Message

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



- 6.
7. Save the validation rule.

Profiles

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.

The screenshot shows the Salesforce Setup Profiles page. At the top, there's a header with a user icon and the word "SETUP". Below it, the title "Profiles" is displayed. A sub-header states: "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." It also mentions Record Types and their edit links. A list of system-wide permissions follows. The main section is titled "Profile Detail" with fields for Name (owner), User License (Salesforce), Description, Created By (udayrishi.yelagandula), Modified By (udayrishi.yelagandula), and a "Custom Profile" checkbox which is checked. Below this is the "Page Layouts" section, which lists standard object layouts for various objects like Global, Email Application, Home Page Layout, Account, Alternative Payment Method, and Appointment Invitation, along with their respective layouts and assignment links.

2.

3. 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.

The screenshot shows the "Custom Object Permissions" section of the Profiles page. It includes sections for "Individuals", "Invoices", and "Leads", each with checkboxes for Read, Create, Edit, Delete, View All, and Modify All. To the right, sections for "Work Types" and "Work Type Groups" are shown with similar permission checkboxes. Below these, the "Custom Object Permissions" section is expanded, showing rows for "Billing Process" and "consumers". Each row has columns for "Basic Access" (Read, Create, Edit, Delete, View All, Modify All) and "Data Administration" (View All, Modify All). A blue arrow points from the text "Give Access and Save it." to the "Basic Access" column for the "Billing Process" row. At the bottom, there are "Session Settings" (Session Times Out After: 2 hours of inactivity) and "Password Policies" sections.

3.

4. Give Access and Save it.

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.

The screenshot shows the Salesforce Setup - Profiles page. The 'Custom Object Permissions' section is highlighted, displaying access levels for various objects. The objects listed are Billing Process, consumers, Laptop Bookings, and Total Laptops. For each object, there are six checkboxes under 'Basic Access' (Read, Create, Edit, Delete) and two under 'Data Administration' (View All, Modify All). The 'Billing Process' and 'consumers' objects have all checkboxes checked. The 'Laptop Bookings' and 'Total Laptops' objects also have all checkboxes checked. Below the permissions, there are sections for 'Session Settings' and 'Password Policies'. In 'Session Settings', 'Session Times Out After' is set to '2 hours of inactivity'. In 'Password Policies', 'User passwords expire in' is set to '90 days', 'Enforce password history' is set to '3 passwords remembered', 'Minimum password length' is set to '8', 'Password complexity requirement' is set to 'Must include alpha and numeric characters', 'Password question requirement' is set to 'Cannot contain password', 'Maximum invalid login attempts' is set to '10', and 'Lockout effective period' is set to '15 minutes'.

4.

5. Give access and save it.

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.



1. Give Label as "owner" and Role name gets auto populated. Then click on Save.
2. 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.

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

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.

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.

13. Save it.

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.

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.
 - Resource: Select \$Record.Laptop_name__c.
 - Operator: Select Equals.
 - Value: Select dell
 - Add the same outcome order to acer , hp, mac.
 - Rename Default outcome as False
 - 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.

- Resource: Select {!\$Record.core_type__c}.
- Operator: Select Equals.
- Value: Select core i3.
- Then again click the symbol '+' outcome details

15. select the Outcome '+' Details Label: dell core i5 , Outcome API name: Gets Automatically Generated.

- Resource: Select Record.core type.
- Operator: Select Equals.
- Value: Select core i5.
- Then again click the symbol '+' outcome details

16. Enter the Outcome Details Label: dell core i7 , Outcome API name: Gets Automatically Generated.

- Resource: Select Record.core type.
- Operator: Select Equals.
- Value: Select core i7.

17. Click done.

18. So go to the flow page select '+' after core i3 then again select the decision.

19. Enter the Details Label: months selected , API name: Gets Automatically Generated.

20. Enter the Outcome Details Label: dell 1(i3) , Outcome API name: Gets Automatically Generated.

- Resource: Select Record.how many months.
- Operator: Select Equals.
- Value: 1.

23. Enter the Outcome Details Label: dell 2(i3) , Outcome API name: Gets Automatically Generated.

- Resource: Select Record.how many months.
- Operator: Select Equals.
- Value: Select 2..

24. Click '+' outcome details

25. Enter the Outcome Details Label: dell 3(i3) , Outcome API name: Gets Automatically Generated.

- Resource: Select Record.how many months.
- Operator: Select Equals.

- Value: Select 3..
26. Click '+' outcome details
27. Enter the Outcome Details Label: dell 4(i3) , Outcome API name: Gets Automatically Generated.
- Resource: Select Record.how many months.
 - Operator: Select Equals.
 - Value: Select 4..
28. Click '+' outcome details
29. Enter the Outcome Details Label: dell 5(i3) , Outcome API name: Gets Automatically Generated.
- Resource: Select Record.how many months.
 - Operator: Select Equals.
 - Value: Select 5.
30. Follow the above picture you will understand.
31. After dell 1(i3) there is '+' symbol like dell 2(i3),dell 3(i3),dell 4(i3),dell 5(i3).
32. Click on '+' then select update records for each and every outcome.
33. Enter the Details Label: one month of dell i3 rate , API name: Gets Automatically Generated. Enter label name in a similar way for other update records.
34. Field:- Amount__c , value:- for dell 1(i3)-1000, dell 2(i3)-2000, dell 3(i3)-3000, dell 4(i3)-4000, dell 5(i3)-5000. Follow all these finally and update the Amount field value based on the number of months.
- 35.
36. Click done.
37. Enter the Details Label: months selected , API name: Gets Automatically Generated.
38. Enter the Outcome Details Label: dell 1(i7) , Outcome API name: Gets Automatically Generated.
- 39.
- Resource: Select Record.how many months.
 - Operator: Select Equals.
 - Value: 1.
40. Enter the Outcome Details Label: dell 2(i7) , Outcome API name: Gets

Automatically Generated.

- Resource: Select Record.how many months.
- Operator: Select Equals.
- Value: Select 2..

41. Click '+' outcome details

42. Enter the Outcome Details Label: dell 3(i7) , Outcome API name: Gets Automatically Generated.

- Resource: Select Record.how many months.
- Operator: Select Equals.
- Value: Select 3..

43. Click '+' outcome details

44. Enter the Outcome Details Label: dell 4(i7) , Outcome API name: Gets Automatically Generated.

- Resource: Select Record.how many months.
- Operator: Select Equals.
- Value: Select 4..

45. Click '+' outcome details

46. Enter the Outcome Details Label: dell 5(i7) , Outcome API name: Gets Automatically Generated.

- Resource: Select Record.how many months.
- Operator: Select Equals.
- Value: Select 5..

Edit Decision

* Label	* API Name																		
months selected	months_selected																		
Description																			
<p>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.</p> <table border="1"><tr><th>OUTCOME ORDER</th><th>OUTCOME DETAILS</th><th>Actions</th></tr><tr><td># 1</td><td>* Label 1 * Outcome API Name X1 Condition Requirements to Execute Outcome All Conditions Are Met (AND)</td><td>Delete Outcome</td></tr><tr><td># 2</td><td></td><td></td></tr><tr><td># 3</td><td></td><td></td></tr><tr><td># 4</td><td></td><td></td></tr><tr><td># 5</td><td>Resource \$Record > how many months Operator Equals Value 1</td><td></td></tr></table>		OUTCOME ORDER	OUTCOME DETAILS	Actions	# 1	* Label 1 * Outcome API Name X1 Condition Requirements to Execute Outcome All Conditions Are Met (AND)	Delete Outcome	# 2			# 3			# 4			# 5	Resource \$Record > how many months Operator Equals Value 1	
OUTCOME ORDER	OUTCOME DETAILS	Actions																	
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# 2																			
# 3																			
# 4																			
# 5	Resource \$Record > how many months Operator Equals Value 1																		

47.

48. Follow the above picture you will understand.

49. After dell 1(i7) there is '+' symbol like dell 2(i7),dell 3(i7),dell 4(i7),dell 5(i7).
50. Click on '+' then select update records
51. Enter the Details Label: one month of dell i5 rate , API name: Gets Automatically Generated.
52. Field:- Amount__c , value:- for dell 1(i7)-2000, dell 2(i7)-4000, dell 3(i7)-6000, dell 4(i7)-8000, dell 5(i7)-10000. Follow for all these finally
53. Click done.
54. **Follow the steps from 37 to 53 for Dell i5 and update the Amount for each month (1,2,3,4,5) as 1500, 2500,3500,4500,5500 respectively.**

APEX

Apex OverView

Apex is a strongly typed, object-oriented programming language that allows developers to execute flow and transaction control statements on the Lightning platform server in conjunction with calls to the Lightning Platform API. Using syntax that looks like Java and acts like database stored procedures, Apex enables developers to add business logic to most system events, including button clicks, related record updates, and Visualforce pages. Apex code can be initiated by Web service requests and from triggers on objects.

It is as similar as java i.e, it also supports OOP(Object oriented programming) like Classes, objects, methods.

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.

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).

- a. Go to the app ? click on the reports tab
 - b. Click New Report.
- 1.

REPORTS

All Reports

1 item

Report Name	Description	Folder	Created By	Created On	Subscribed
Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	11/9/2023, 11:01 am	

2.

3.

4. 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.

Category

Recently Used

All

Accounts & Contacts

Opportunities

Customer Support Reports

Leads

Campaigns

Activities

Contracts and Orders

Price Books, Products and Assets

Select a Report Type

Showing results for lap

Report Type Name	Category
Total Laptops	Standard
Total Laptops with Laptop Bookings	Standard
Total Laptops with Laptop Bookings and Consumer	Standard
Total Laptops History	Standard
consumer with Billing Process and Laptop Bookings	Standard
Laptop Bookings History	Standard

Details

Total Laptops with Laptop Bookings and Consumer
Standard Report Type

Start Report

Fields (41)

Created By You

Laptop Analytics

Created By Others

No Reports Yet

5.

6.

7. 4.Create a simple tabular report
8. 5.Add fields from left pane, make sure that Amount field will be selected.
9. 6.Click the Amount column drop down and select bucket list.
10. 7.

Edit Bucket Column

* Field	* Bucket Name		
Amount	X	types of versions	
	Range	Bucket	X
<input type="button" value="Add ▶"/>	<= 900	basic	X
<input type="button" value="Add ▶"/>	> 900 to 1500	intermediate	X
<input type="button" value="Add ▶"/>	> 1,500 to 10000	high	X
<input type="button" value="Add ▶"/>	> 10,000	very high	X

Treat empty Amount values in the report as zeros.

11.

Cancel

Apply

12.

13. Click apply it.

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

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

15.

16.

17. Click on Save & run it.

18.

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

Row Counts Detail Rows Subtotals Grand Total

Sharing report to owner

- Click edit drop down and select subscribe option

The screenshot shows the same report interface as above, but with the 'Edit' button in the top right corner of the toolbar open. A dropdown menu is displayed, containing options: 'Save As', 'Save', 'Subscribe' (which is highlighted with a red box), 'Export', 'Delete', and 'Add to Dashboard'.

- Follow as per below image.

Edit Subscription

Settings

Frequency

Daily Weekly Monthly

Time

8:00 am ▾

Attachment

Attach File

Recipients

Send email to

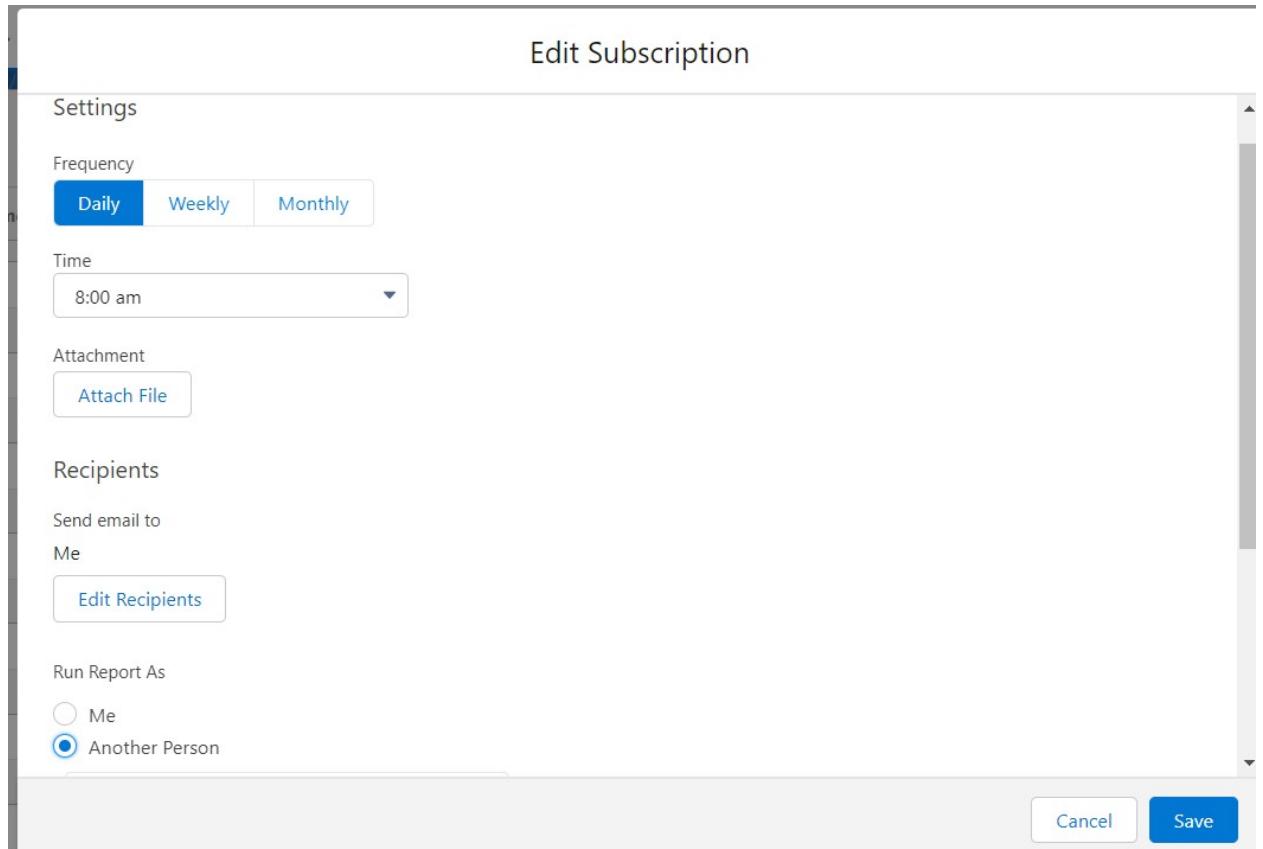
Me

[Edit Recipients](#)

Run Report As

Me
 Another Person

[Cancel](#) [Save](#)



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.

NOTE: The owner gets daily email notification of that laptop booking report.so that he can see all data remotely.

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

Duration: 1 Hrs

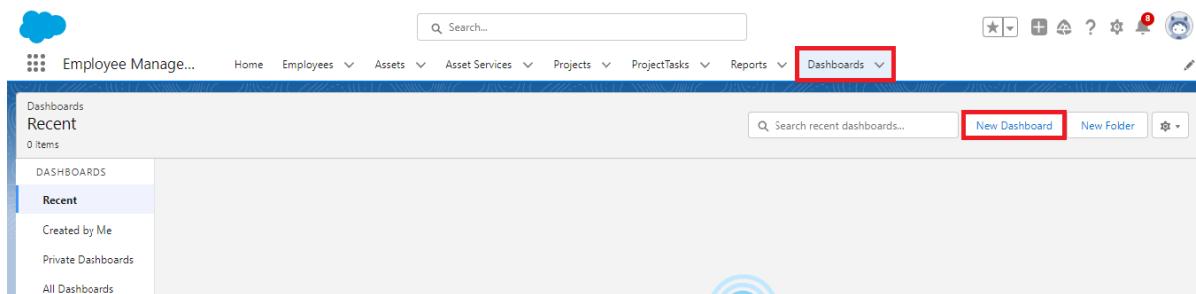
1. Click on the app launcher and search for the dashboard.
2. Click on the dashboard tab.
3. Click the new folder, give the folder label as "total rent amount".
4. Folder unique names will be auto populated.
5. Click save.

Create Dashboard

Duration: 1 Hrs

Skill Tags:

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.

New Dashboard

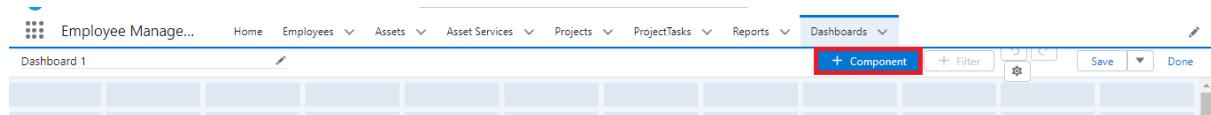
* Name

Description

Folder
 Select Folder

Cancel Create

3. Select add component.



4. Select a Report and click on select.

Add Component

consumer with laptops and total lapt X

Use chart settings from report i

Display As

Value

Sliced By

Preview

consumer with laptops and total laptops

types of versions	Value
intermediate	₹37k
high	₹39k
very high	₹82k

View Report (consumer with laptops and total laptops)

Cancel Add

5. Select the dark component and add to the dashboards.
6. Save it.
7. Click done.