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

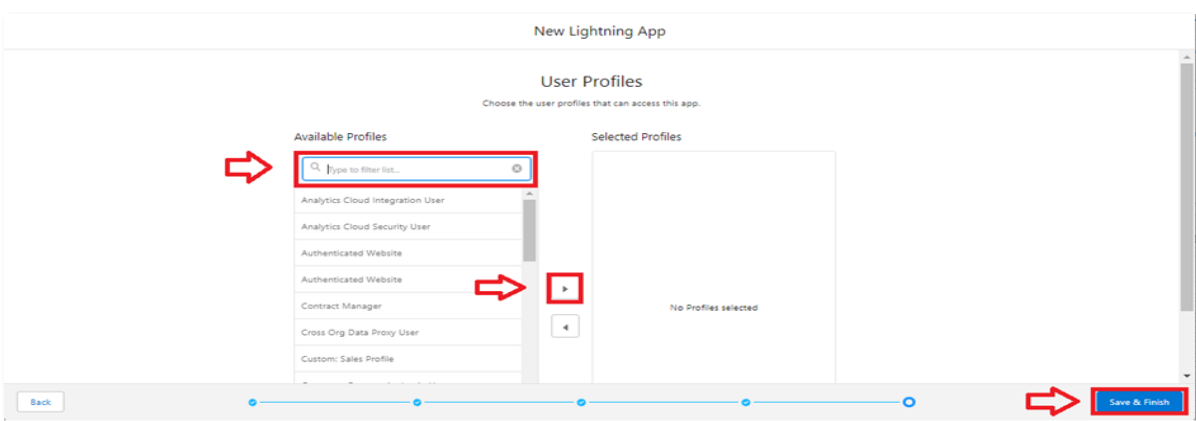
An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.
Lightning apps let you brand your apps with a custom color and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

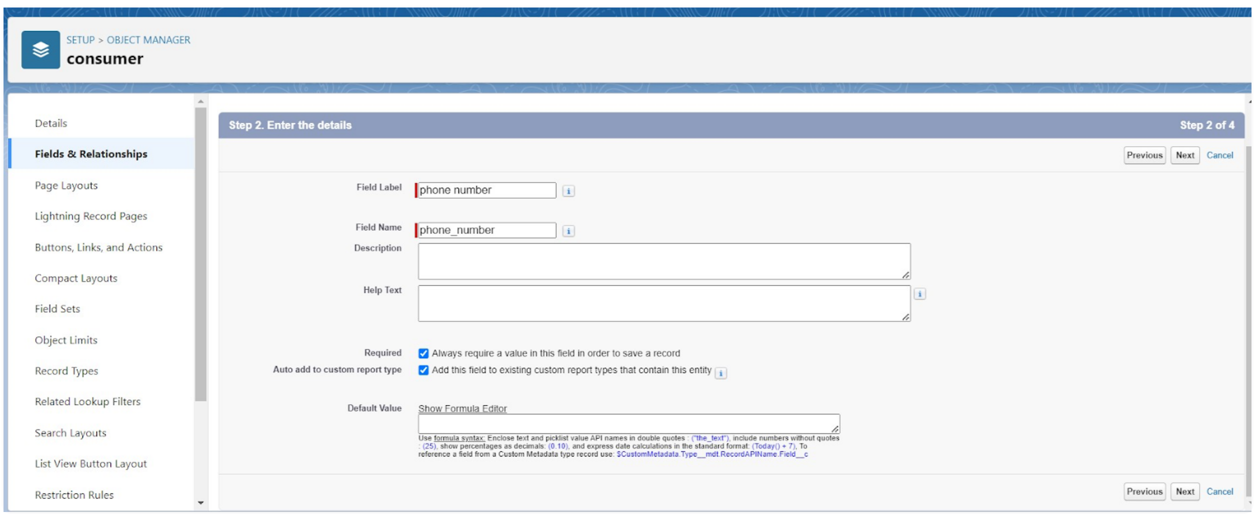
2. Fill the app name in app details as LAPTOP RENTALS >>Next >> (App option page) keep it as default >> Next >> (Utility Items) keep it as default >> Next.
3. Upload a photo that is related to your app.
4. To Add Navigation Items: select the items (Total Laptops,consumer,Laptop Booking,Billing Process) 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.

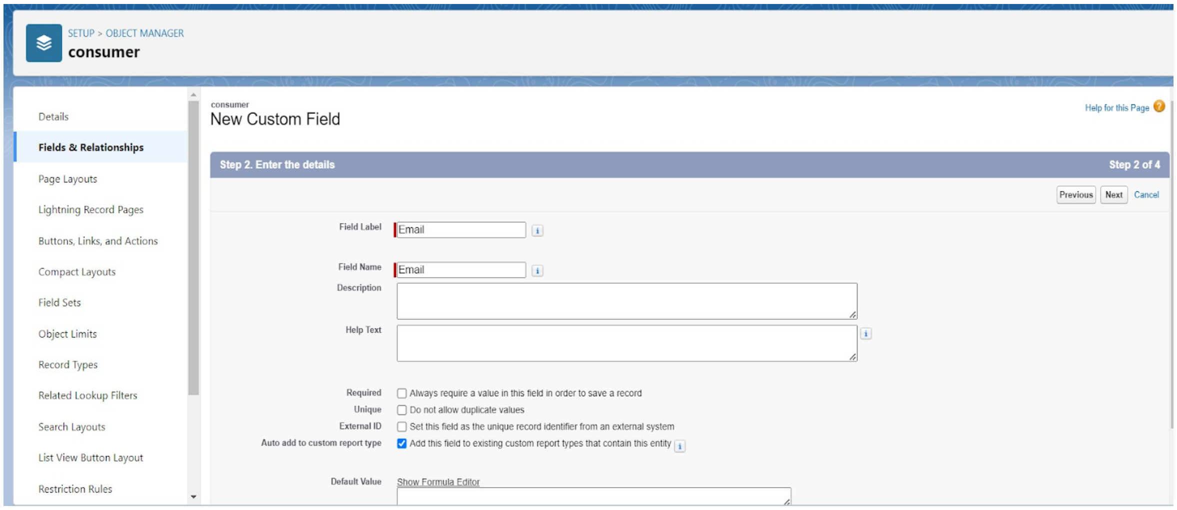
Fields:

Creating the field in consumer object

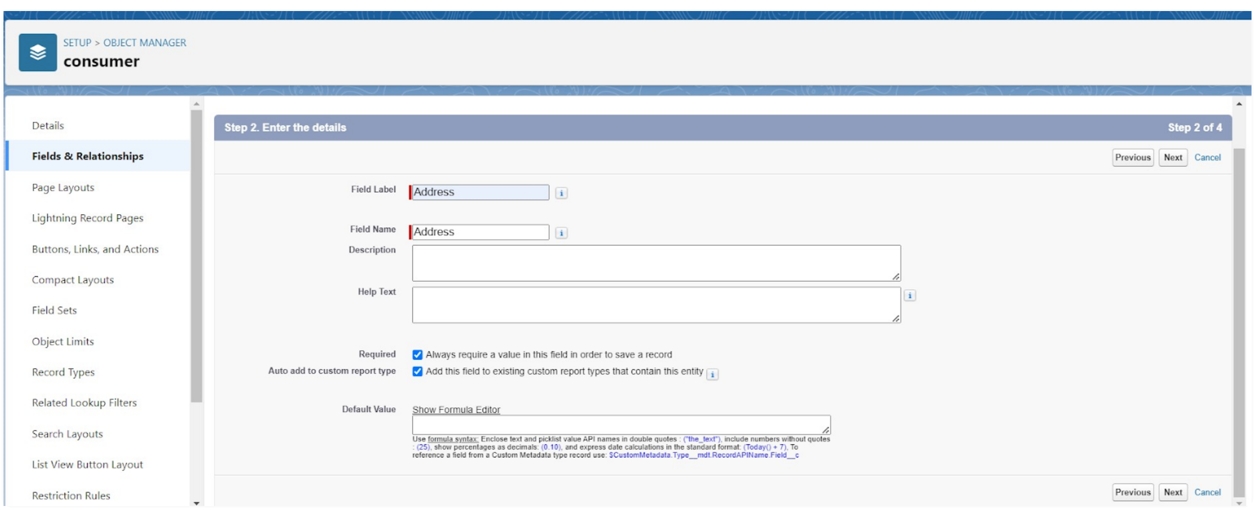
- **1. To create fields in an object:**
    a. Go to setup >> click on Object Manager >> type object name(consumer) in search bar >> click on the object.
    a. Now click on “Fields & Relationships” >> New
    b. Select Data Type as a “Phone”
    c. Click on next
    d. Fill the Above as following:
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

2. To create another fields in an object:

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



- **3. To create another fields in an object:**
    a. Go to setup >> click on Object Manager >> type object name(consumer) in search bar >> click on the object.
    b. Now click on "Fields & Relationships" >> New
    c. Select Data type as a "Text Area" and Click on Next
    d. 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.



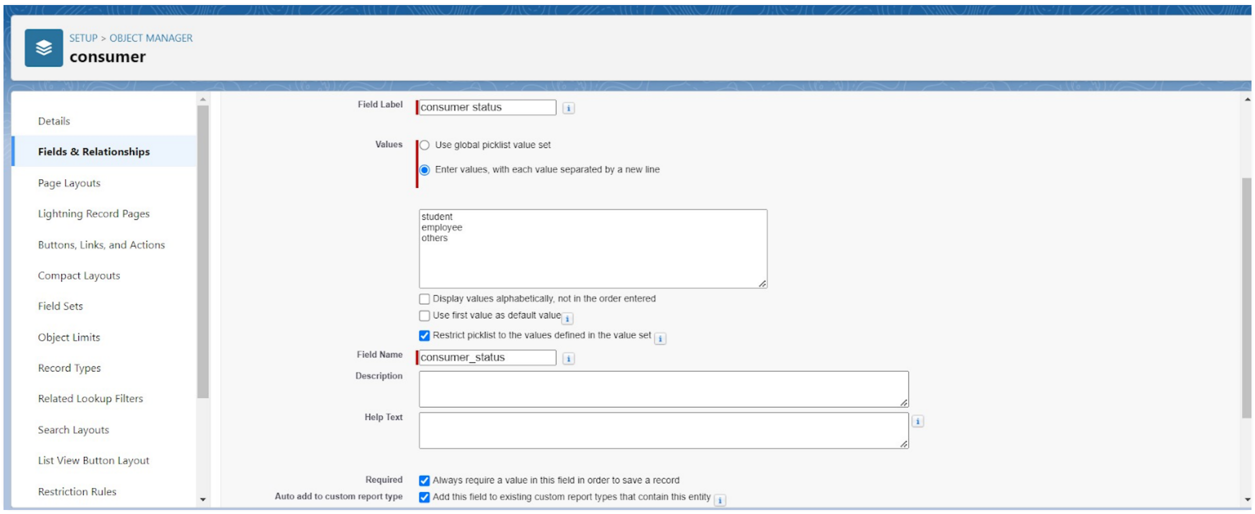
- **4. To create another fields in an object:**
    a. Go to setup >> click on Object Manager >> type object name(consumer) in search bar >> click on the object.
    b. Now click on "Fields & Relationships" >> New
    c. Select Data type as a "Picklist" and Click on Next

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

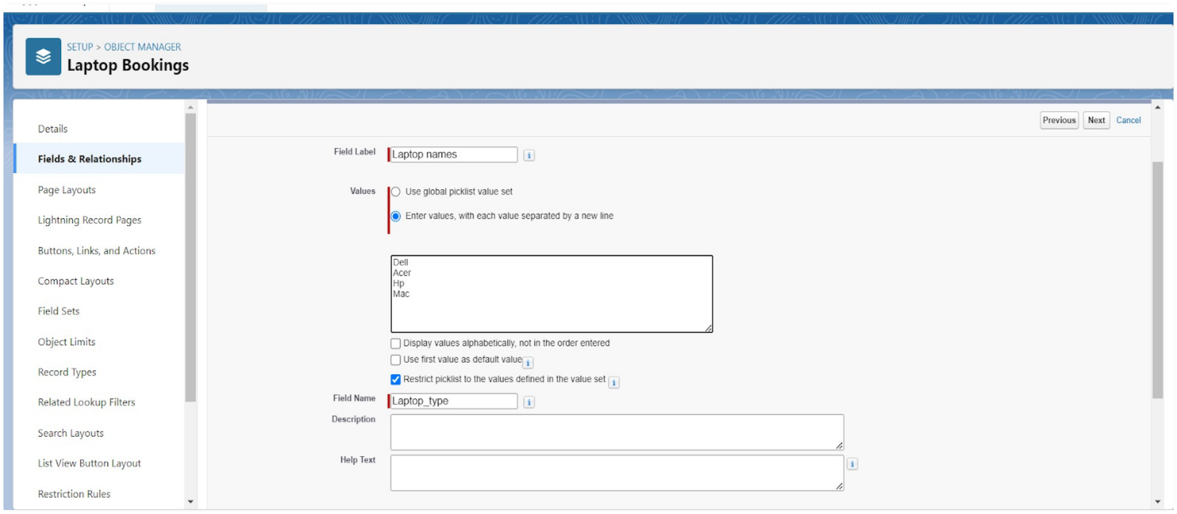
- Select required
- Field Name :It’s gets auto generated
- Click on Next >> Next >> Save and new.

- 

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

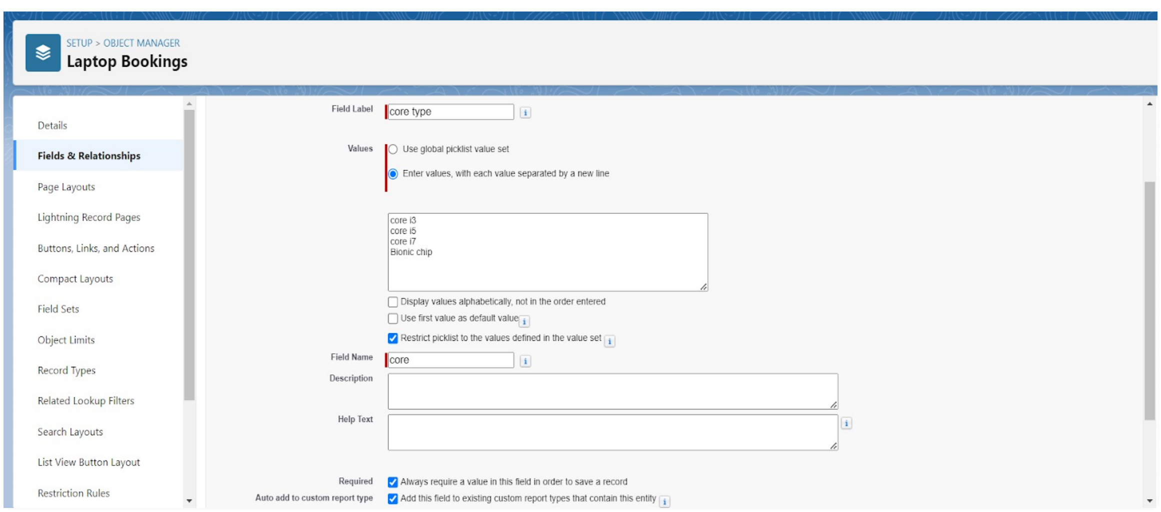
To create fields & relationship to an object:

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

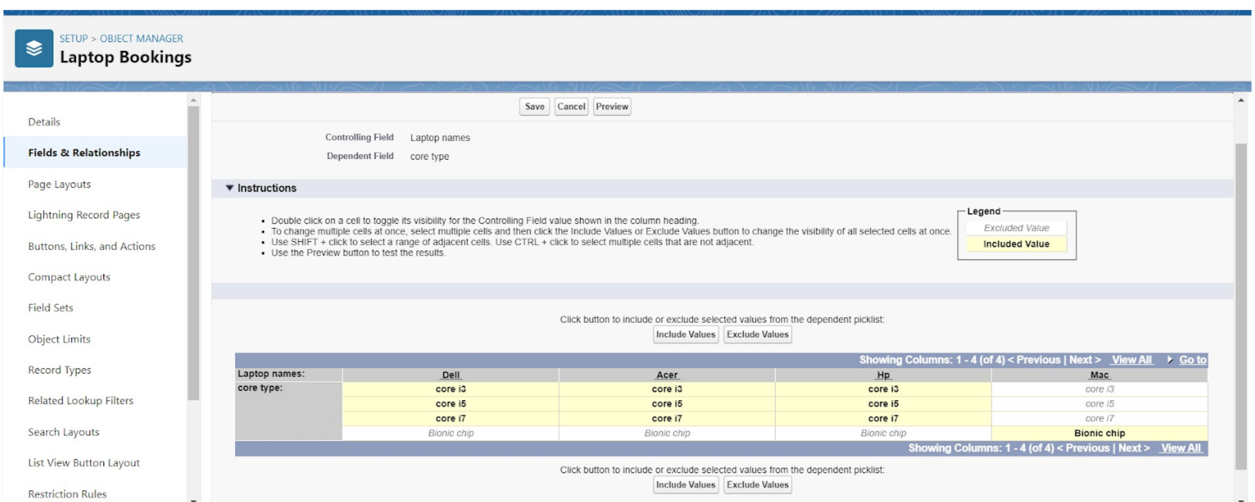
To create field dependency to an object:

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.



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

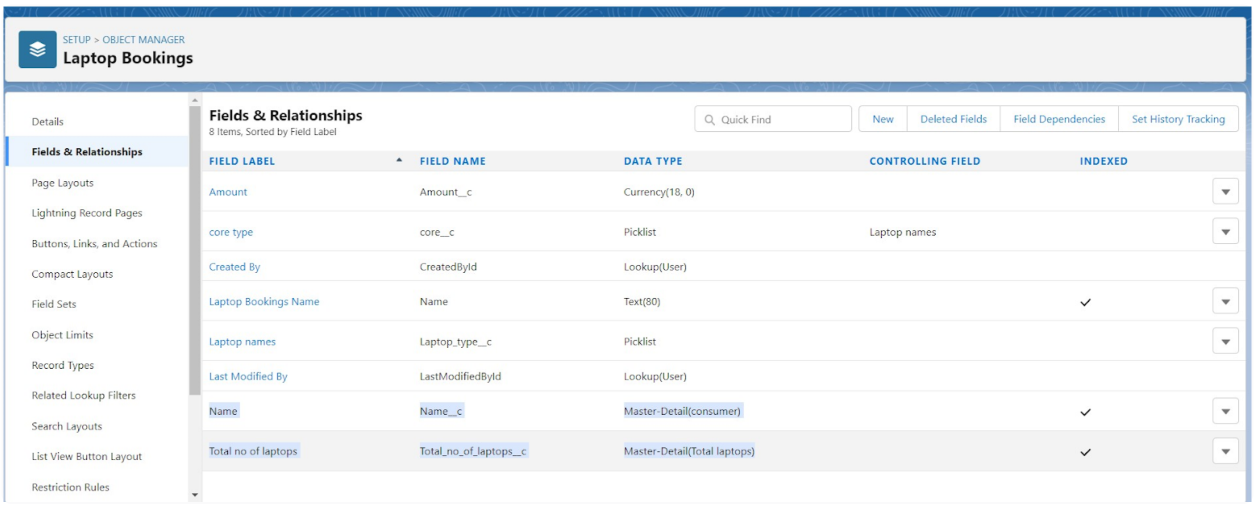
1. Go to setup >> click on Object Manager >> type object name(Laptop Booking) in the search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data Type as a “Lookup Relationship”
4. Click on Next
5. Click on the Related to drop down and Select the “Total Laptops” object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

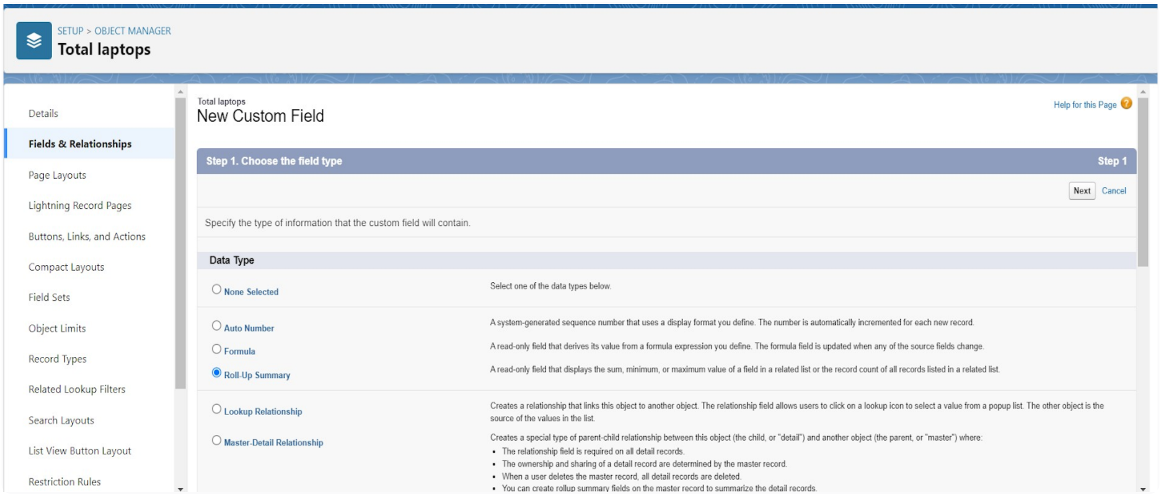
To create fields & relationship to an object:

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.

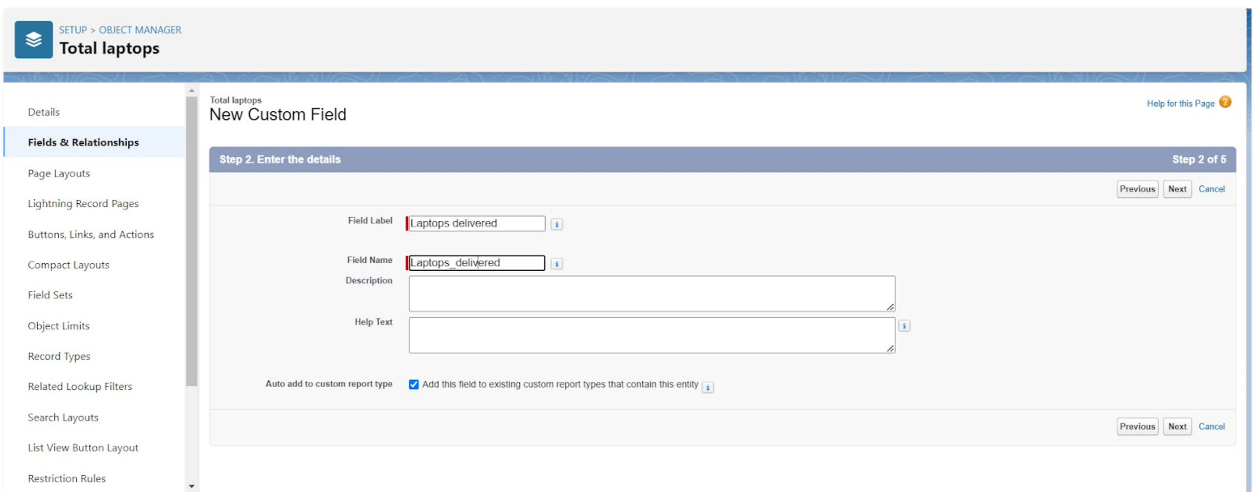


To Create a Rollup Summary Field in "Total Laptops Object"

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

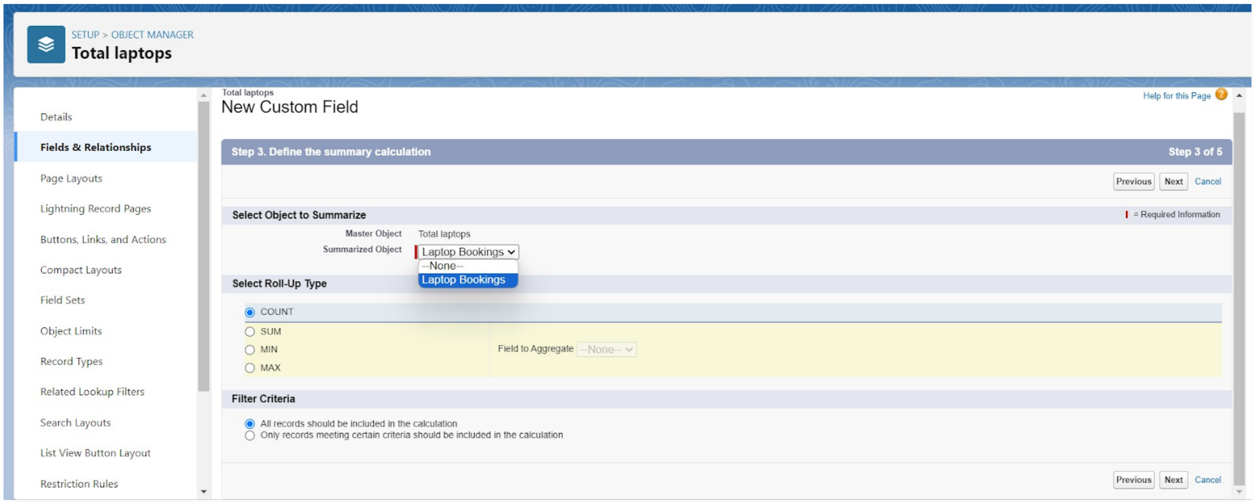


4. Select Data type as a “Roll-up Summary” and Click on Next

- Fill the Above as following:
- Field Label: Laptops delivered
- Field Name :It’s gets auto generated
- 

- Click on Next

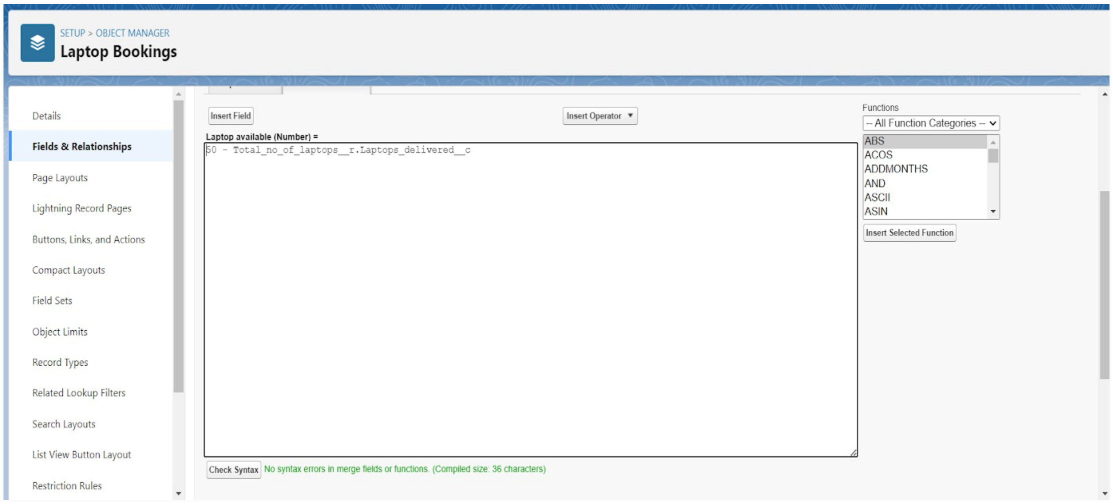
6. Select the Laptop Bookings in the Summarized Object
7. Select the count Radio button in the select Roll-up Type

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



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

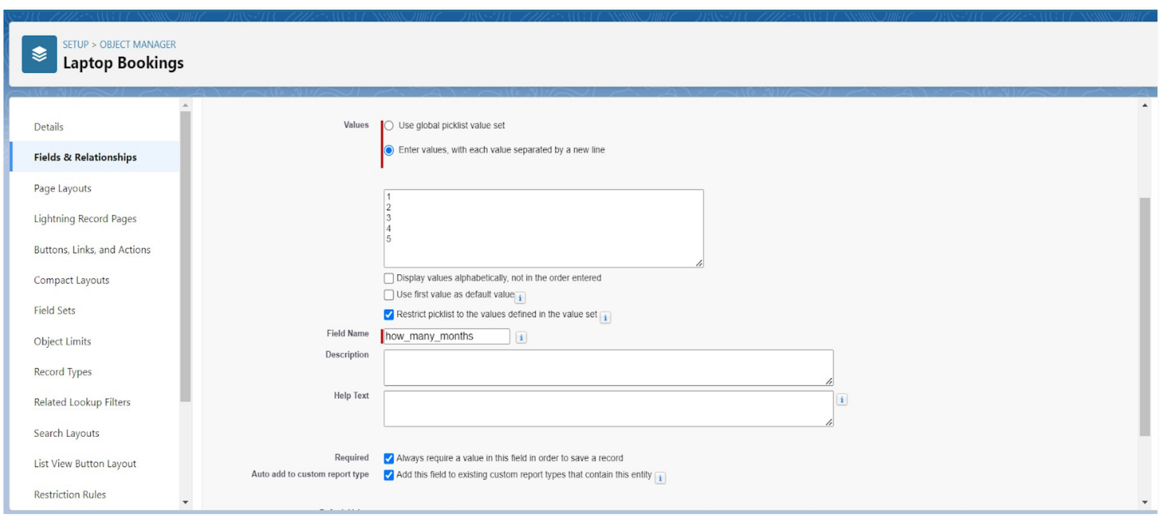
To create fields in an object:

1.Go to setup >> click on Object Manager >> type object name(Laptop Booking) in the 2.search bar >> click on the object.

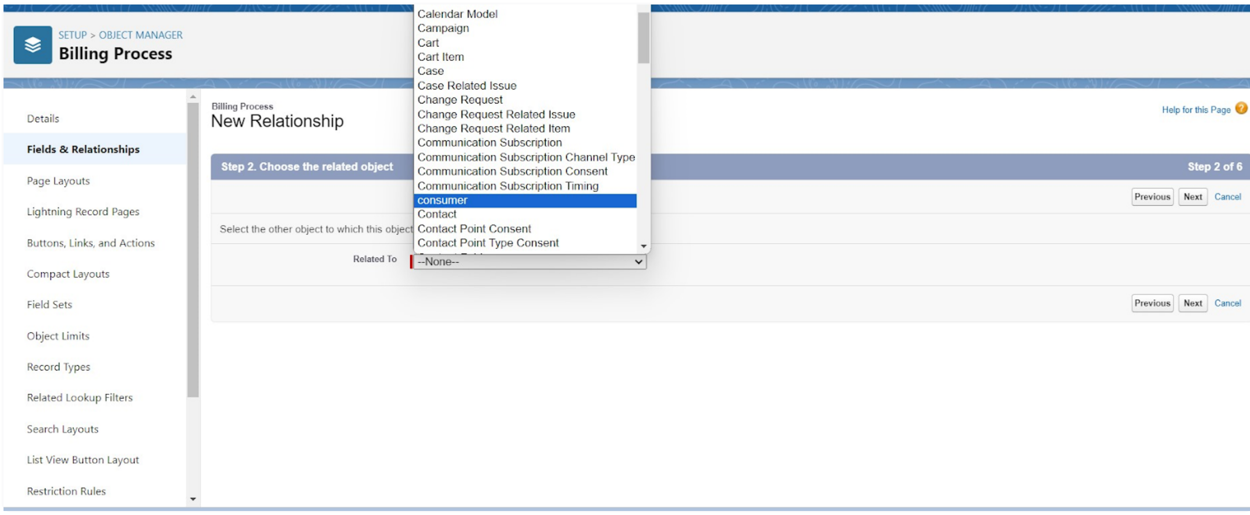
3.Now click on "Fields & Relationships" >>New

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.

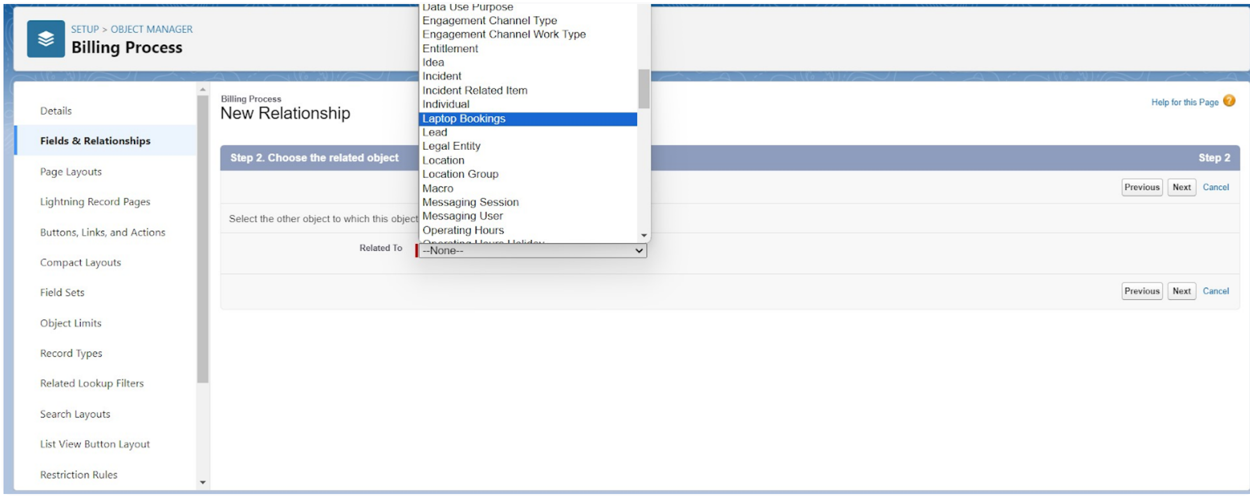


Creation of Fields & Relationship for Billing Process Object

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:

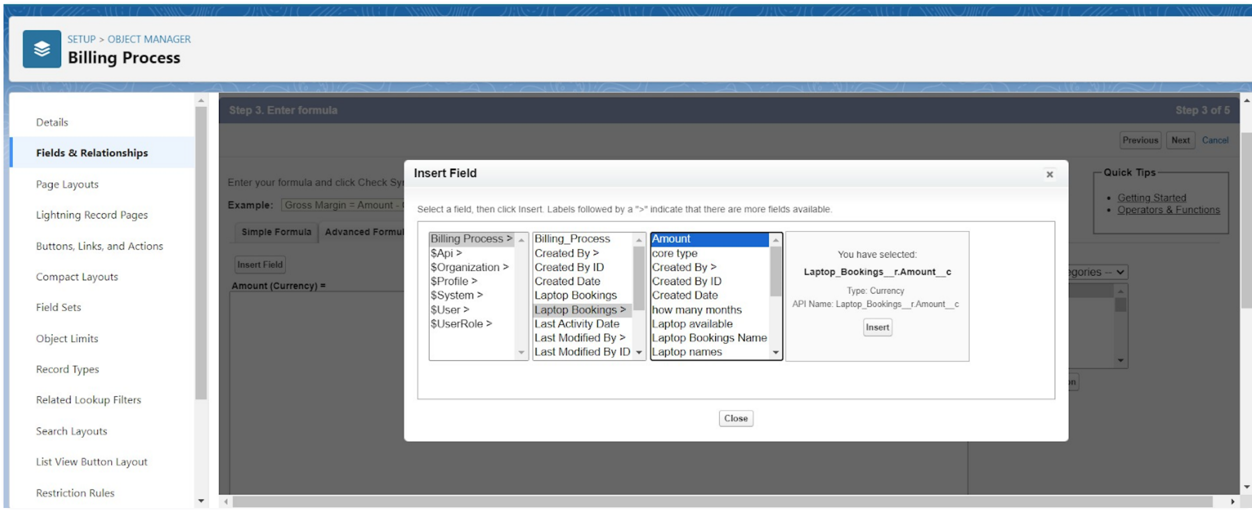
- Field Label: Payment Mode
- Value >> Select enter values with each value separated by a new line

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.

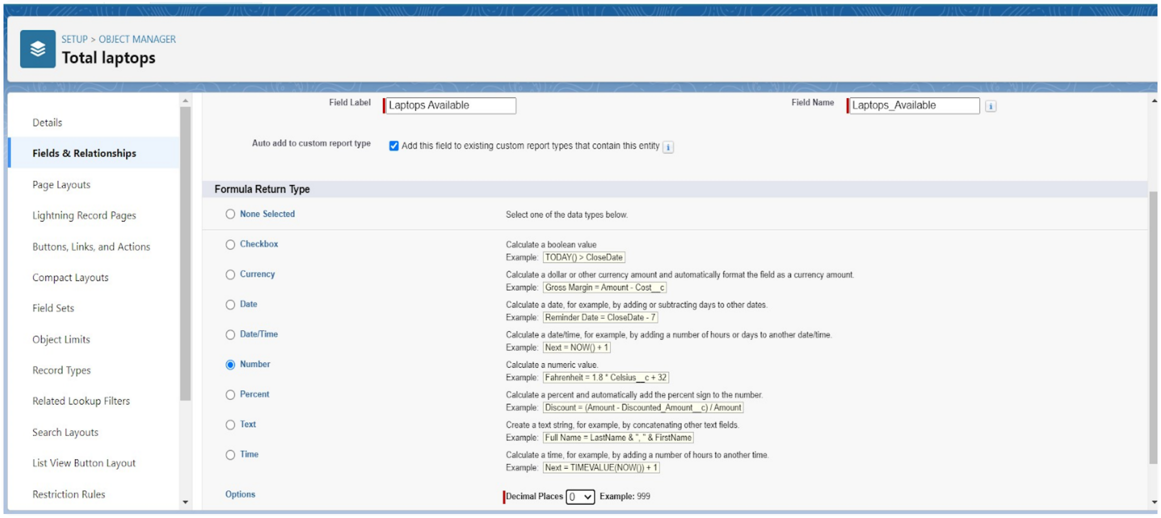


j. Click on Next >> Next >> Save and new.

Creating the field in Total Laptops object

1. To create fields in an object:

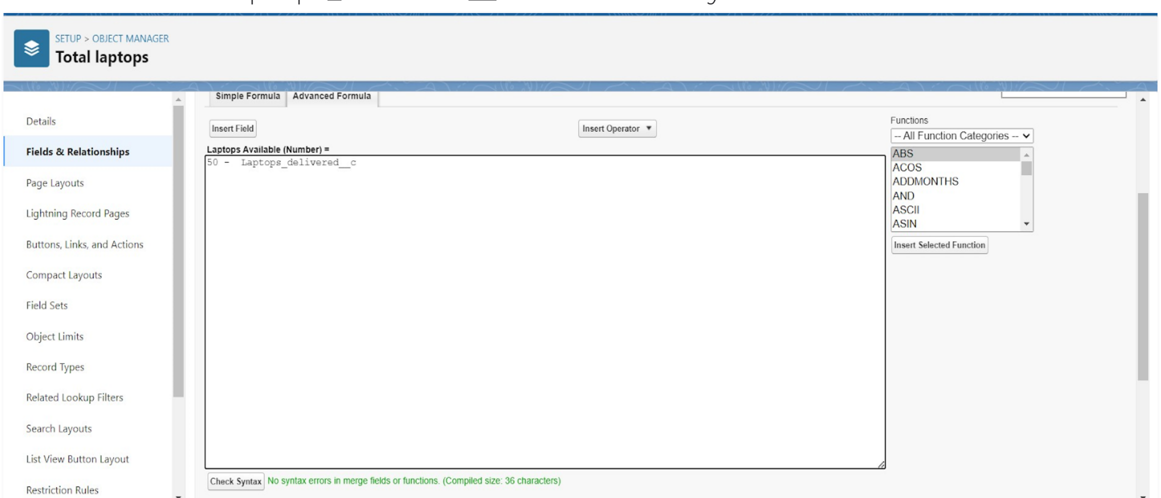
1. Go to setup >> click on Object Manager >> type object name(Total Laptops) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as a “Formula” and Click on Next
4. Fill the Above as following:
5. Field Label: Laptops Available
6. Field Name : It’s gets auto generated
7. Select the Formula Return Type as “Number”



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



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

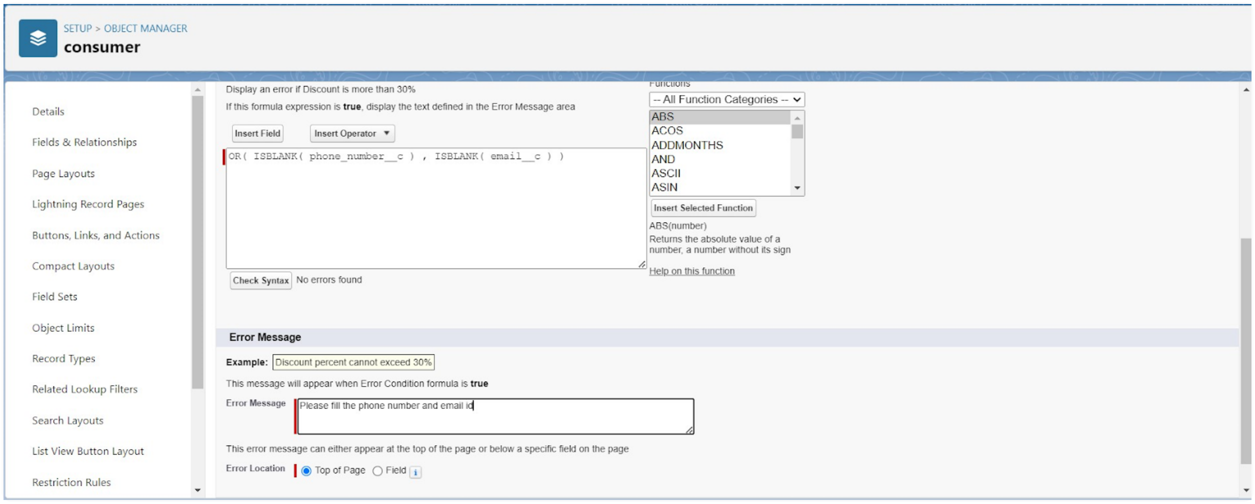
Validation rule

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.

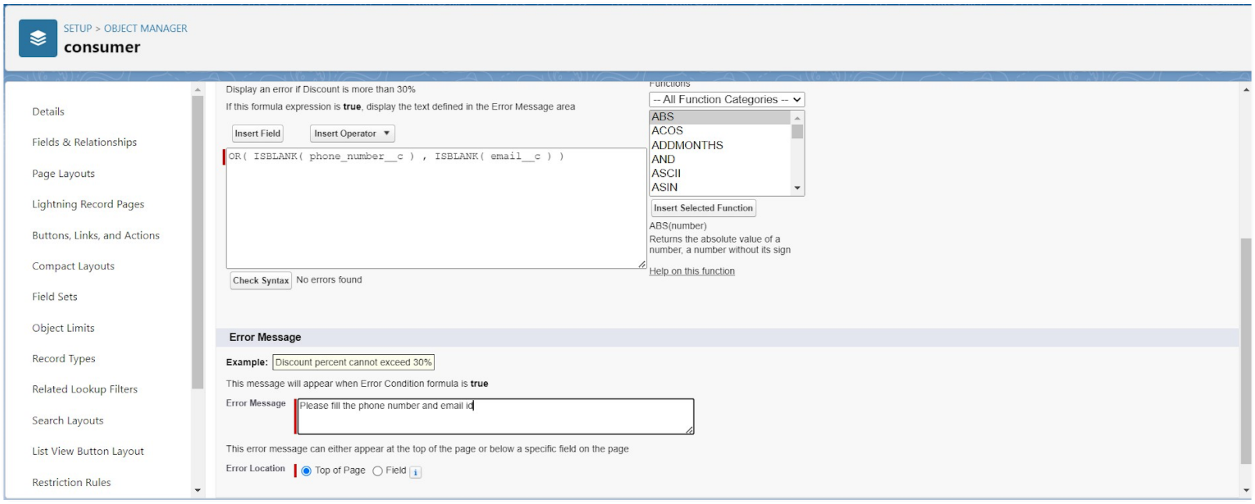
6. 

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.

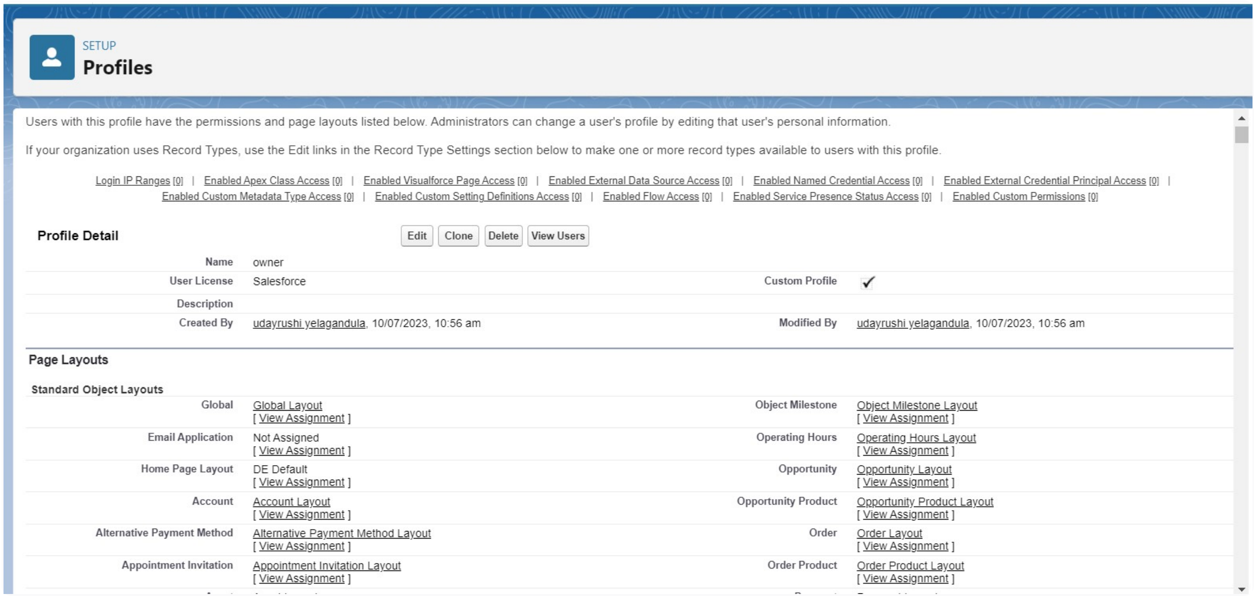
6. 

7. Save the validation rule.

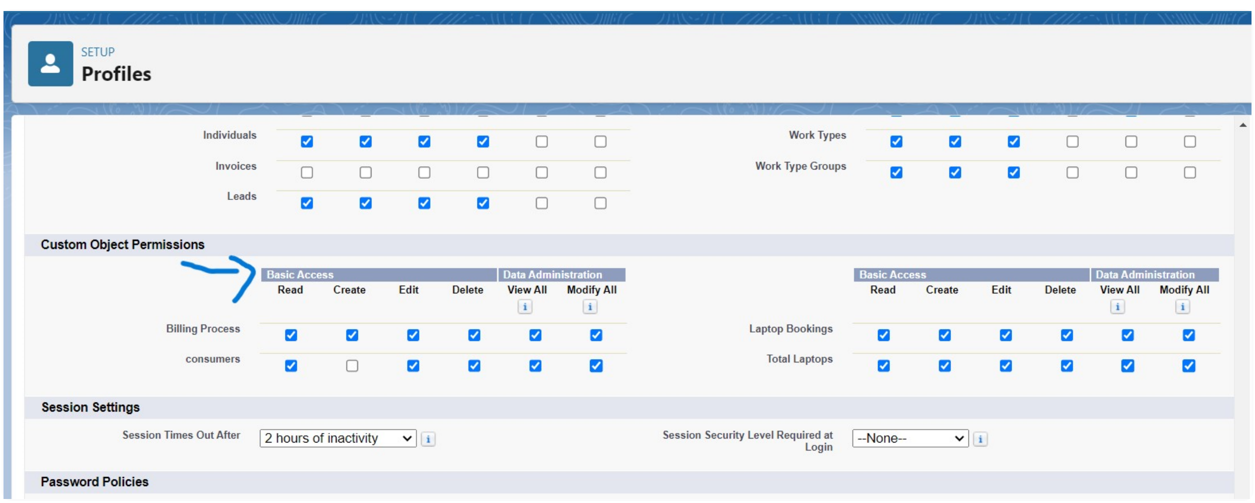
Profiles

owner Profile

To create a new profile:

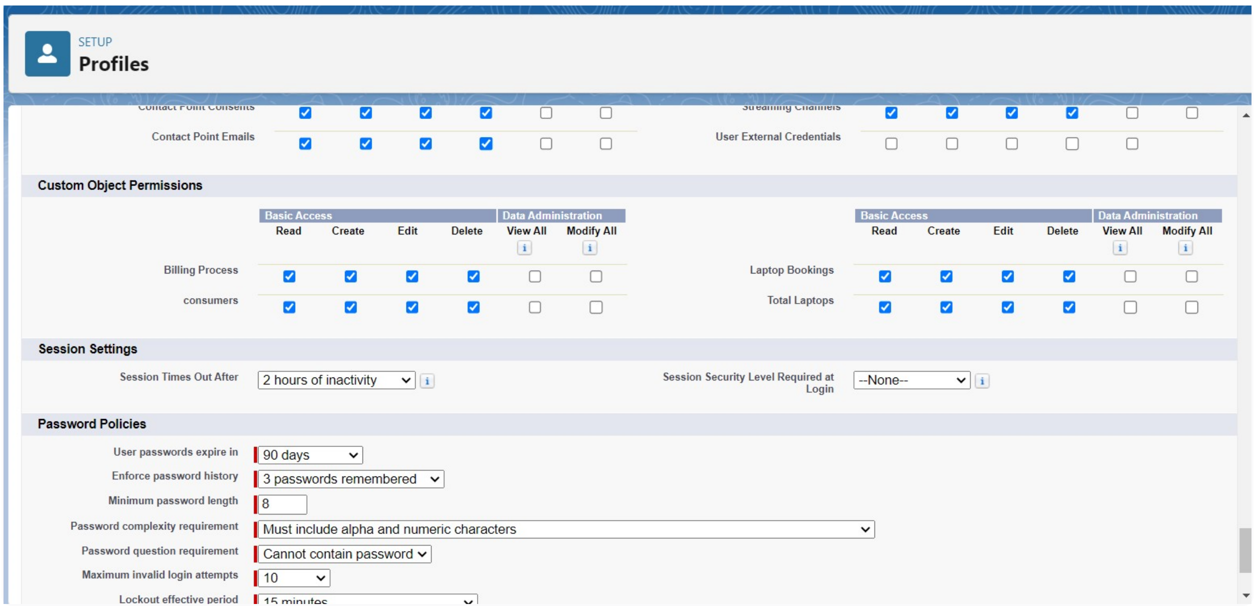
1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Standard User) >> enter profile name (owner) >> Save.
2. 

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.

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.
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.

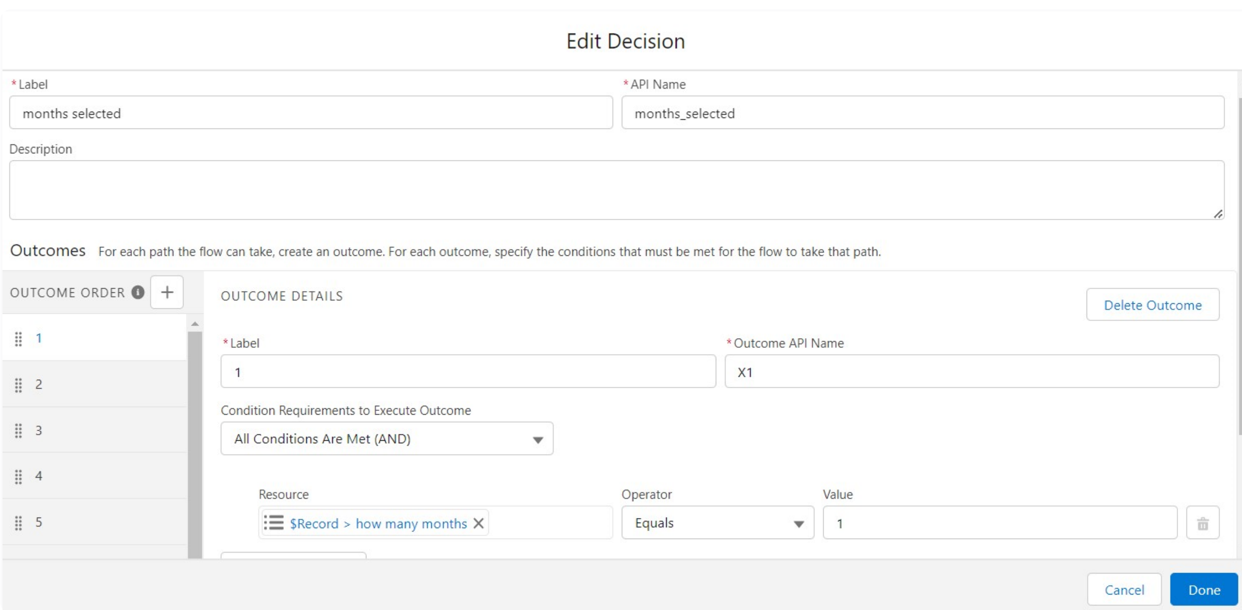
- Resource: Select Record.how many months.
- Operator: Select Equals.
- Value: Select 3..

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.



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.

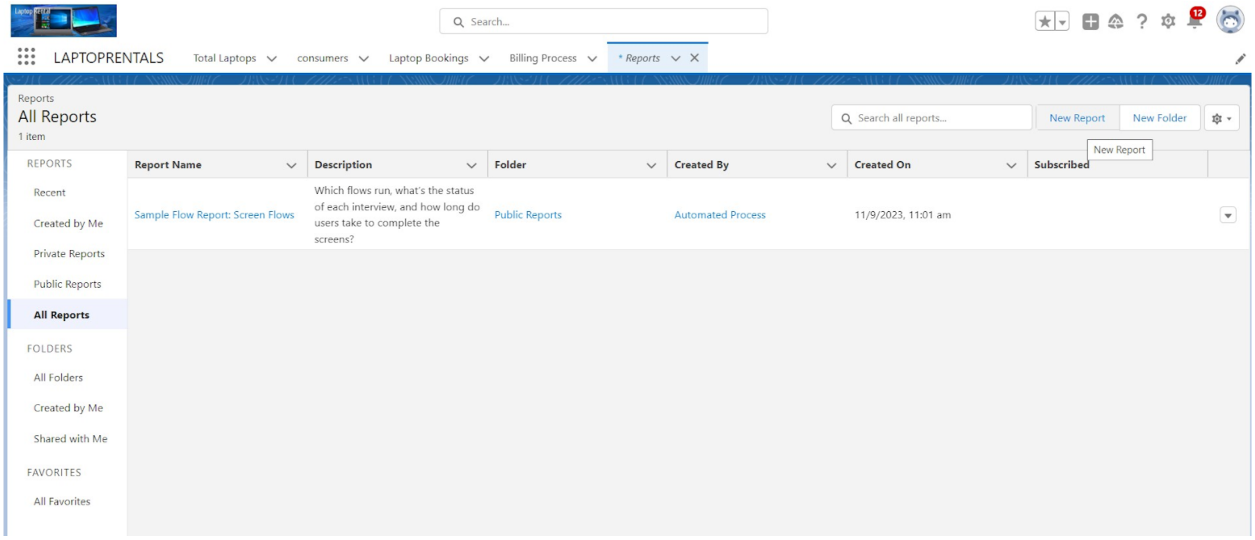
Reports

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.

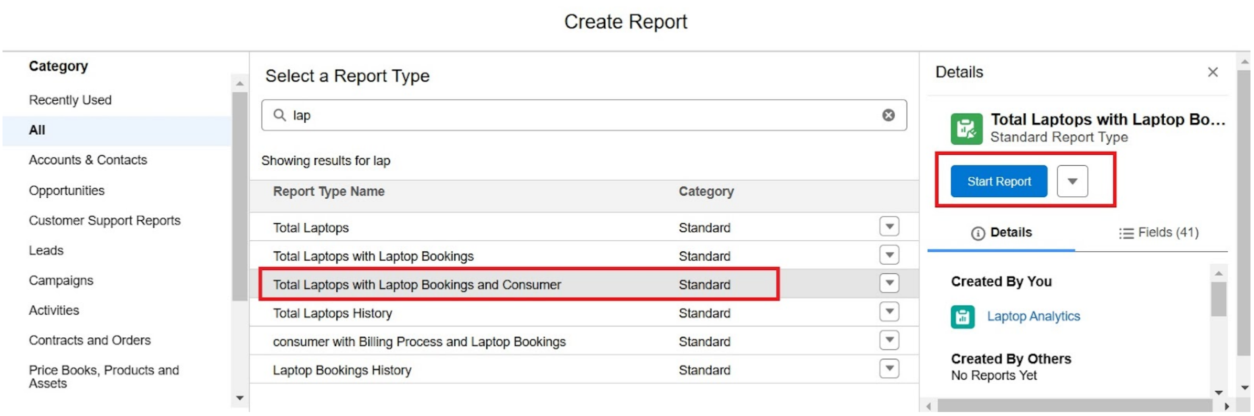
Note: Before creating reports just fill the 10-12 records in the Laptop Bookings object. Create records for each one you have to create at least 2 different records i.e dell(i3), dell(i7),acer(i3),hp(i5),mac(bionic chip).

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

1.

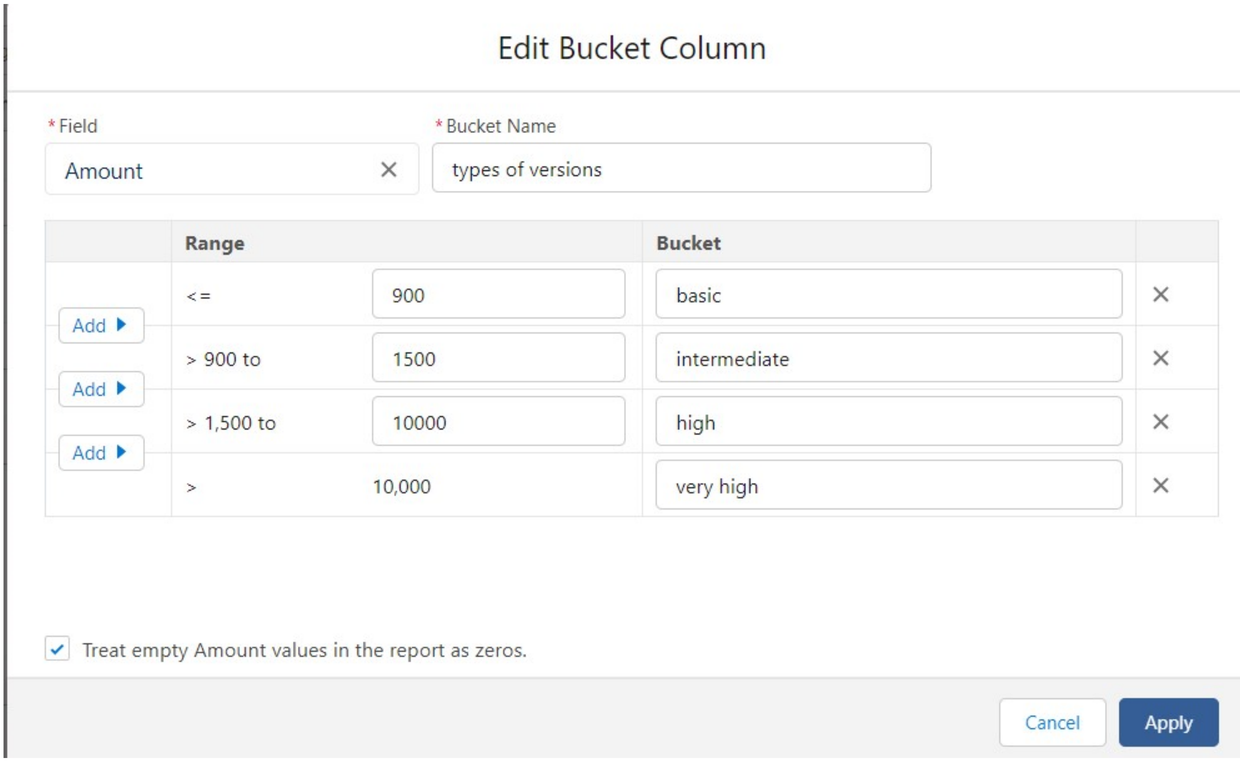
2. 

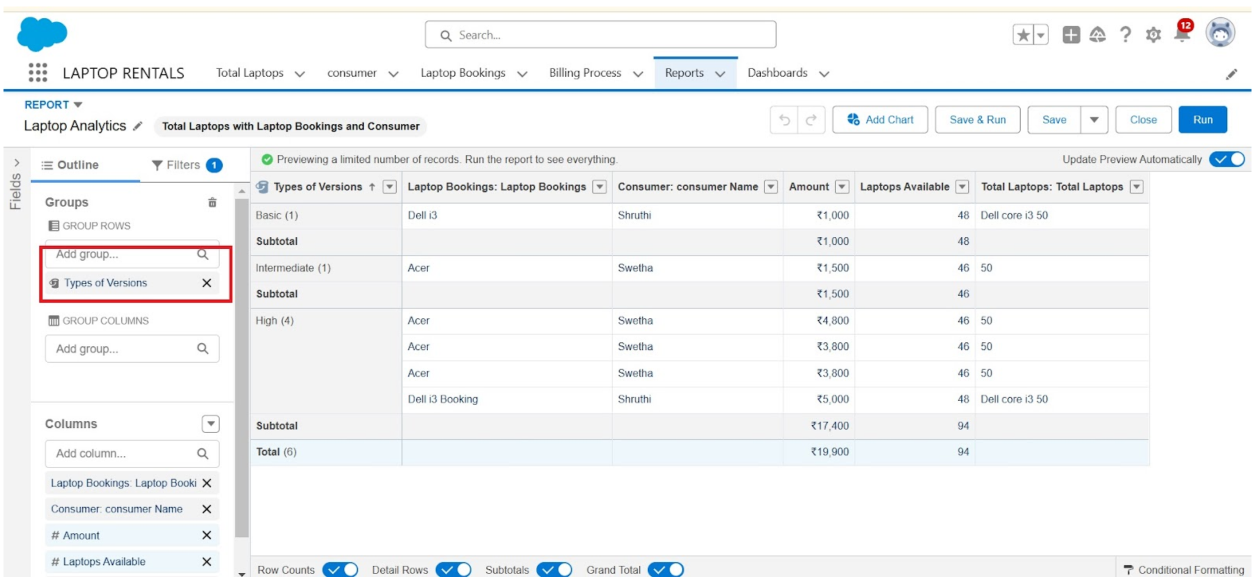
3.
4. 3.Select report type from category or from report type panel or from search panel “consumer with Laptop Bookings and total laptops” ? click on start report.

5. 

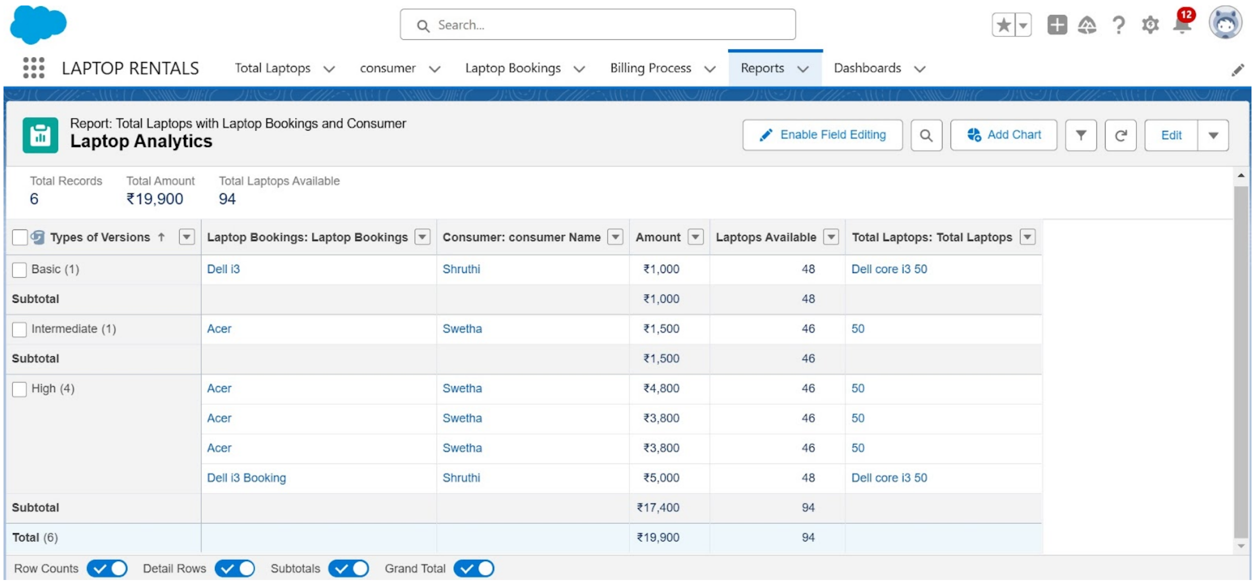
6.

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.

11. 

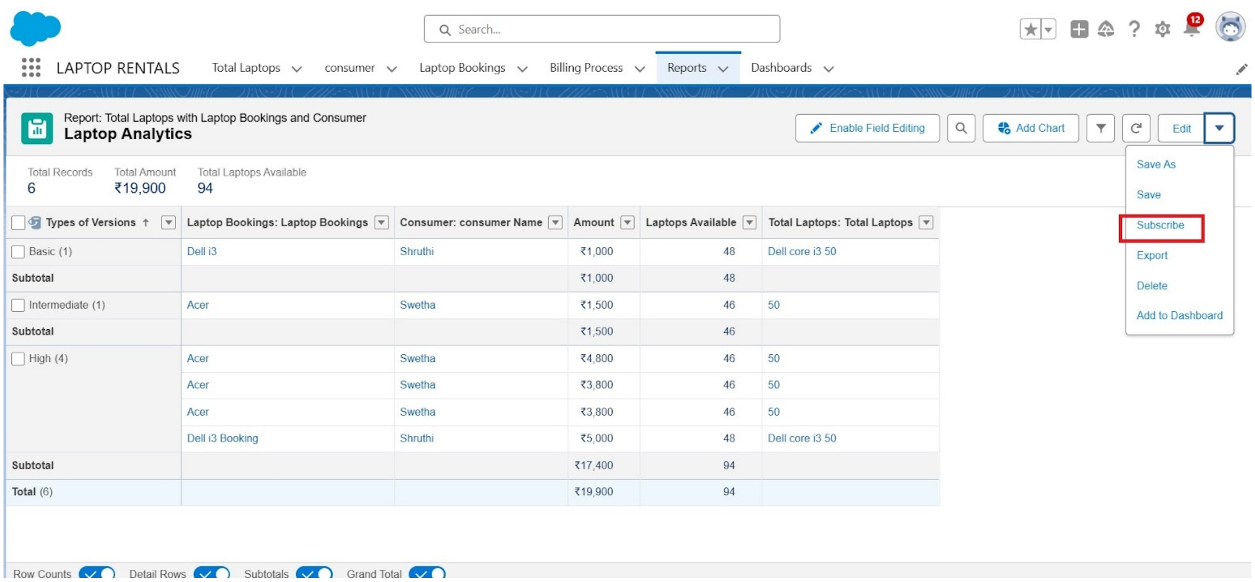
12.
13. Click apply it.
14. 8. Select Types of version in Group By Rows to create **a summary report**. Follow the image for other fields.
15. 

16.
17. Click on Save & run it.

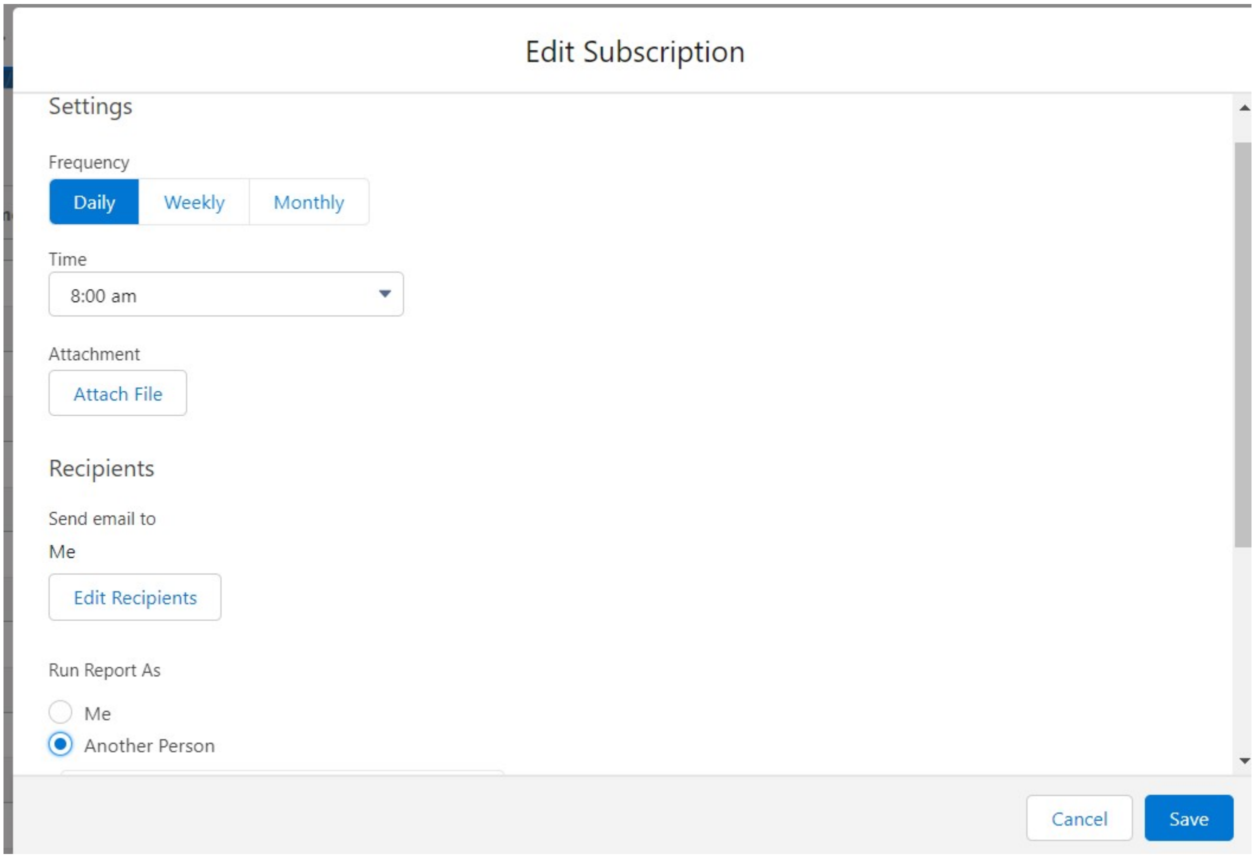
18. 

Sharing report to owner

1. Click edit drop down and select subscribe option



2. Follow as per below image.



3. After selecting the run report as a “another person” select your personal account or whom you want to send that mail to.
4. Click save.

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

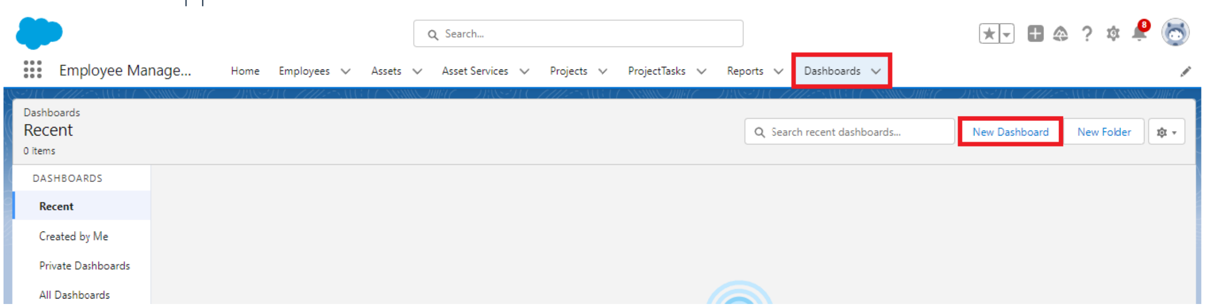
1. Click on the app launcher and search for the dashboard.
2. Click on the dashboard tab.
3. Click the new folder, give the folder label as "total rent amount".
4. Folder unique names will be auto populated.
5. Click save.

Create Dashboard

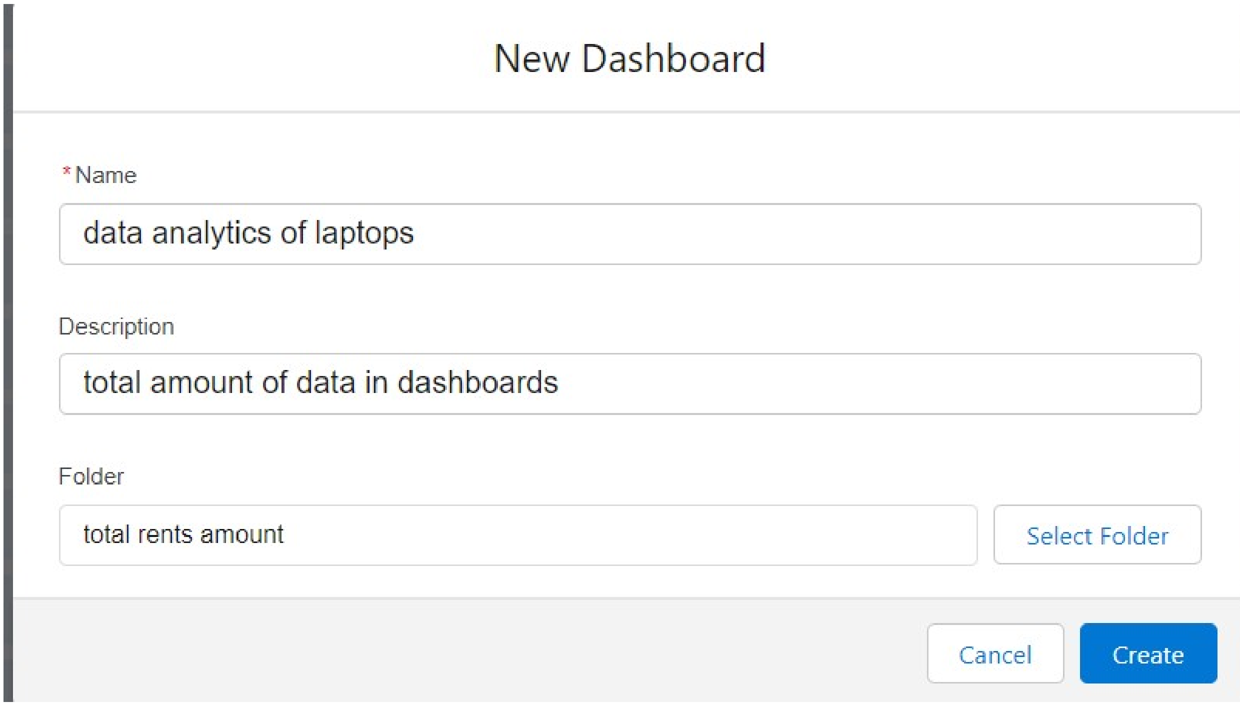
Duration: 1 Hrs

Skill Tags:

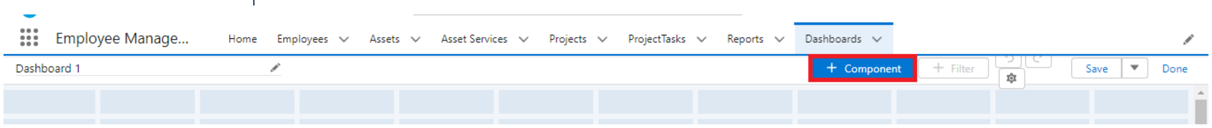
1. Go to the app >> click on the Dashboards tabs.



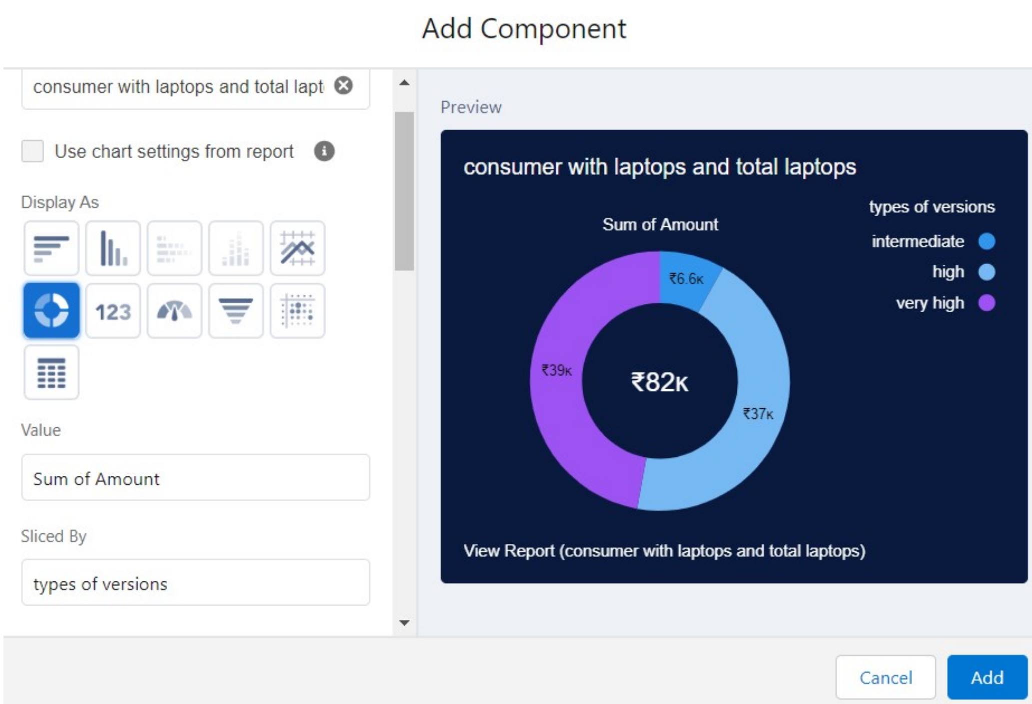
2. Give a Name and select the folder that was created, and click on create.



3. Select add component.



4. Select a Report and click on select.



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