

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:

Introduction:

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.

What Is 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.

So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this:

<https://youtu.be/r9EX3IGde5k>

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. Country : India
6. Postal Code : pin code
7. Username : should be a combination of your name and company

Build enterprise-quality apps fast to bring your ideas to life

- 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
- Customize UI with clicks or any leading-edge web framework

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*
Country/Region

Postal Code*
Your postal code

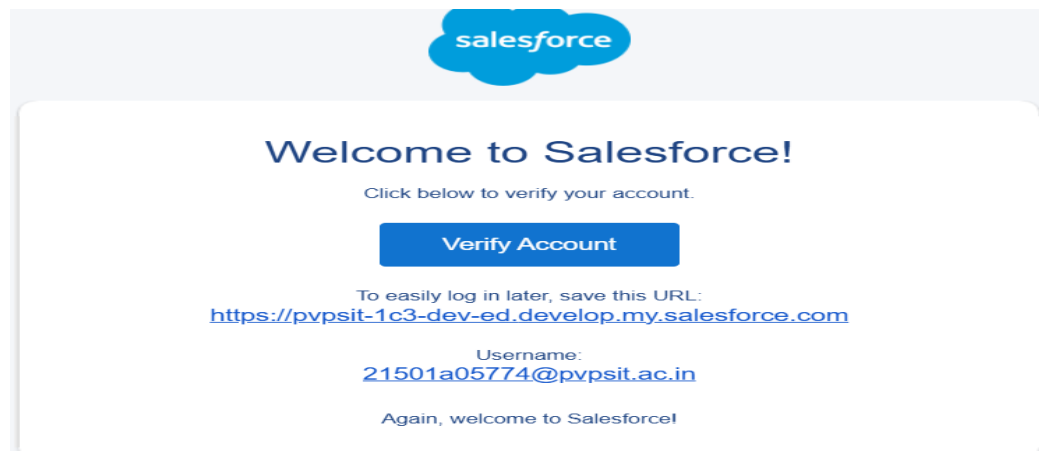
Username*
jane@company.sandbox

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 credential. [Read more about username recommendations.](#)

☐ I agree to the Main Services Agreement – Developer Services and Salesforce Program Agreement.

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.



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.

Create Total Laptops Object

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

- Plural label name>> Total Laptops
- Enter Record Name Label and
Format Record Name >>Total
Laptops
Data Type >> Text
- Click on Allow reports,Allow search and Track Field History,
- Allow search >> Save.

SETUP > OBJECT MANAGER
Total Laptops

Details

Fields & Relationships
6 Items. Sorted by Field Label

Q, Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Laptops Available	Laptops_Available_c	Formula (Number)		▼
Laptops delivered	Laptops_delivered_c	Roll-Up Summary (COUNT Laptop Bookings)		▼
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Total Laptops	Name	Text(30)		✓ ▼

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

Create consumer Object

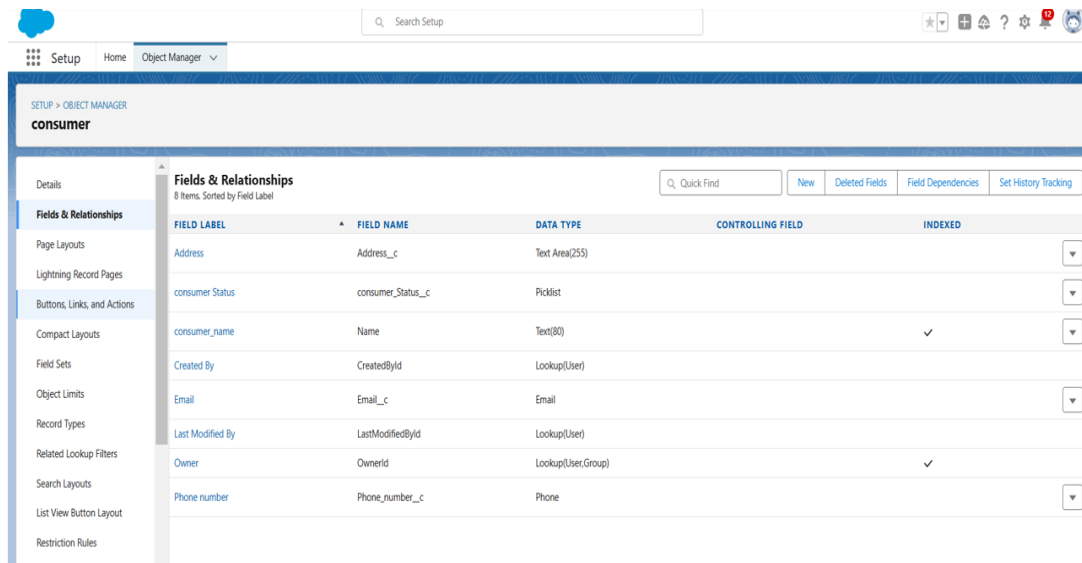
- From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
- Enter the label name >> consumer
- Plural label name >> consumer
- Enter Record Name Label and

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 >> Laptop

Bookings Data Type >> Name

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

SETUP > OBJECT MANAGER
Laptop Bookings

Details

Fields & Relationships
11 Items, Sorted by Field Label

Q, Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Currency(18, 0)		▼
core type	core_type__c	Picklist	Laptop names	▼
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		▼
how many months	how_many_months__c	Picklist		▼
Laptop Bookings	Name	Text(80)		✓ ▼
Laptop names	Laptop_names__c	Picklist		▼
Laptops Available	Laptops_Available__c	Formula (Number)		▼
Last Modified By	LastModifiedById	Lookup(User)		

Create Billing Process Object

- From the setup page >> Click on 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 >> Billing

Process Data Type >>

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

Billing process

SETUP > OBJECT MANAGER

Billing Process

Details

Fields & Relationships
7 Items, Sorted by Field Label

Q, Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Number)		▼
Billing ProcessName	Name	Text(80)		✓ ▼
Created By	CreatedById	Lookup(User)		
Laptop Booking	Laptop_Booking__c	Lookup(Laptop Bookings)		✓ ▼
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Master-Detail(consumer)		✓ ▼
Payment Mode	Payment_Mode__c	Picklist		▼

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

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 Profiles: Search profiles (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
2. Custom Fields

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

Custom Fields:

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

Creating the field in consumer object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(consumer) in search bar >> click on the object.
2. Now click on "Fields & Relationships" >> New
3. Select Data Type as a "Phone"
4. 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

To Create a Fields & Relationship to an Laptop Booking

Object To create fields & relationship to an object:

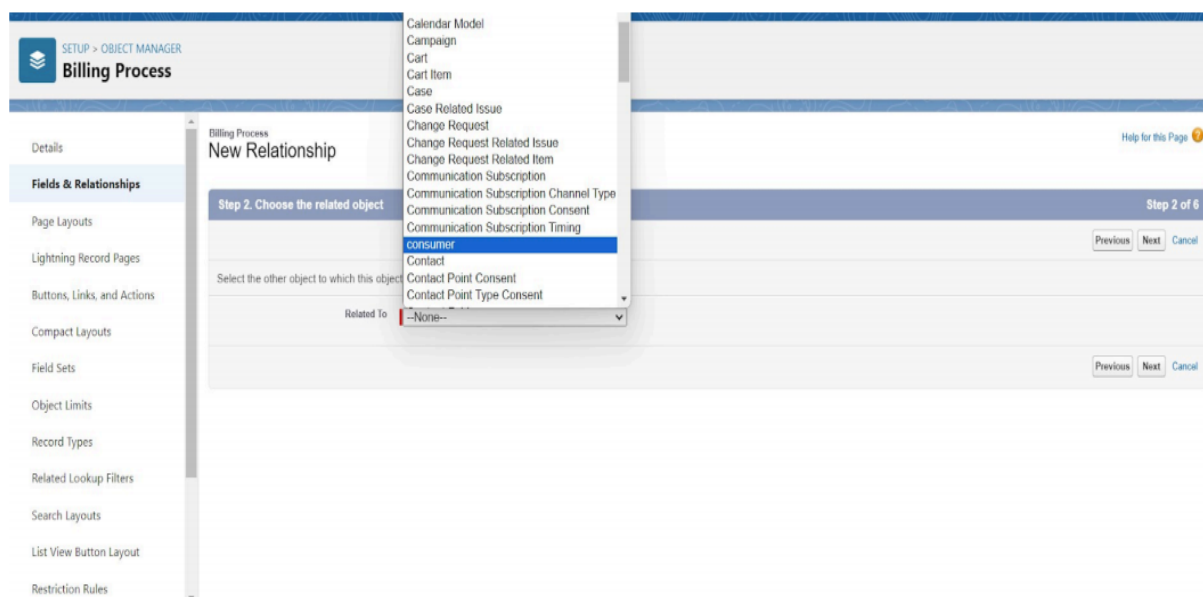
1. Go to setup >> click on Object Manager >> type object name(Laptop Booking) in the search bar >> click on the object.
2. Now click on "Fields & Relationships" >> New
3. Select Data Type as a "Picklist"
4. Picklist values are:-1.core i3 2. Core i5 3. Core i7 .
5. Select required
6. Click on Next >> Next >> Save and new
7. Go to setup >> click on Object Manager >> type object name(Laptop Booking) in the search bar >> click on the object.
8. click field dependency and next
9. 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 Above as
following: Field
Label: Payment
Mode

Value >> Select enter values with each value separated by a new

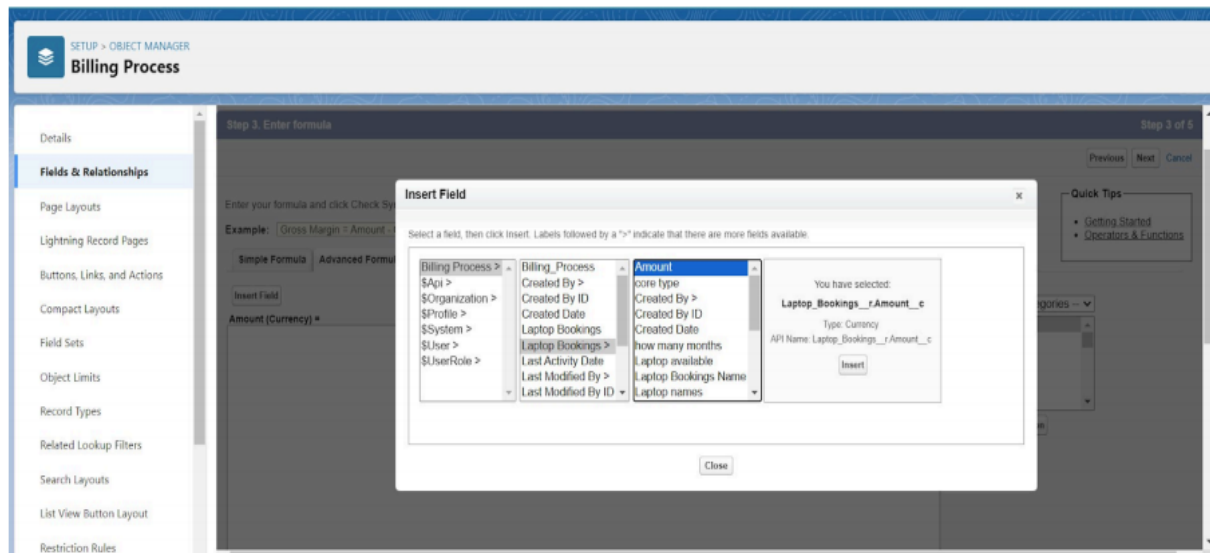
line Cash
Che
ck
Cred
it
card
Debi
t
card
UPI
Pho
nep
e
Gpa
y
Payt
m

Select required

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

Create a Cross object formula Field in billing process Object

1. Go to setup >> click on Object Manager >> type object name(Billing Process) in the search bar >> click on the object.
2. Now click on "Fields & Relationships" >> New
3. Select Data Type as a "Formula"
4. Click on Next
5. Enter the Field label: Amount, the Field name gets auto generated and click on Next.(Formula return type Number).
6. In the Advanced Formula Click on the Insert field in the popup Screen Select the Billing Process and in the second drop down select the Laptop Booking and in the three drop down select the Amount field and click on Insert
7. " Laptop_Booking__r.Amount__c ".
8. Click on the Check syntax: No syntax errors in merge fields



Creating the field in Total Laptops object

1. 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

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

☐ None Selected
Select one of the data types below.

☐ Checkbox
Calculate a boolean value.
Example: $\text{TODAY()} > \text{CloseDate}$

☐ Currency
Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: $\text{Gross Margin} = \text{Amount} - \text{Cost}_{_c}$

☐ Date
Calculate a date, for example, by adding or subtracting days to other dates.
Example: $\text{Reminder Date} = \text{CloseDate} - 7$

☐ DateTime
Calculate a datetime, for example, by adding a number of hours or days to another datetime.
Example: $\text{Next} = \text{NOW()} + 1$

☒ Number
Calculate a numeric value.
Example: $\text{Fahrenheit} = 1.8 * \text{Celsius}_{_c} + 32$

☐ Percent
Calculate a percent and automatically add the percent sign to the number.
Example: $\text{Discount} = (\text{Amount} - \text{Discounted_Amount}_{_c}) / \text{Amount}$

☐ Text
Create a text string, for example, by concatenating other text fields.
Example: $\text{Full Name} = \text{LastName} \& ", " \& \text{FirstName}$

☐ Time
Calculate a time, for example, by adding a number of hours to another time.
Example: $\text{Next} = \text{TIMEVALUE}(\text{NOW}) + 1$

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

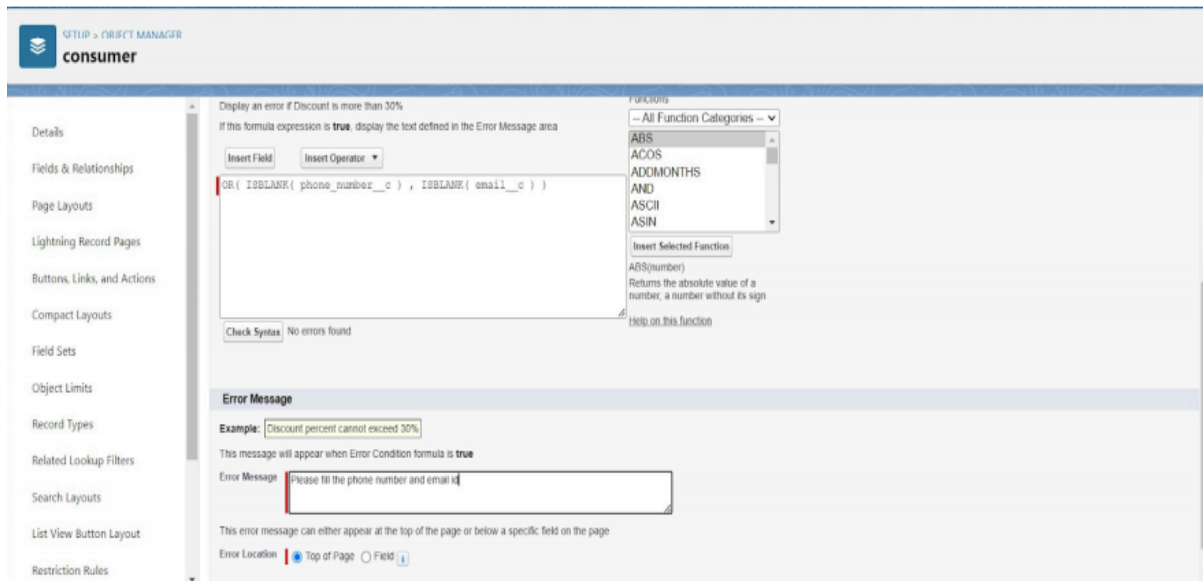
1. Go to the setup page - click on object manager - From drop down click edit for consumer object.
2. Click on the validation rule - click New.

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 navigation links: 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 'Display an error if Discount is more than 30%'. It includes a formula editor with the formula 'OR(ISBLANK(phone_number__c) , ISBLANK(email__c))'. A 'Check Syntax' button shows 'No errors found'. Below the formula editor is the 'Error Message' section, which includes an example message 'Discount percent cannot exceed 30%' and a text area for the error message 'Please fill the phone number and email id'. The 'Error Location' section has radio buttons for 'Top of Page' (selected) and 'Field'.

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.



Profiles

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. Profile controls "Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges. You can define profiles by the user's job function. For example System Administrator, Developer, Sales Representative.

Types of profiles in salesforce

1. Standard profiles:

By default salesforce provides below standard profiles.

- a. Contract Manager
- b. Read Only
- c. Marketing User
- d. Solutions Manager
- e. Standard User

f. 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.

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 'Profiles' page in the Salesforce Setup menu. The 'owner' profile is selected. The 'Custom Object Permissions' section is expanded, showing permissions for 'Billing Process', 'consumers', 'Laptop Bookings', and 'Total Laptops'. A blue arrow points to the 'Billing Process' row. 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--'.

Object	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"/>

3. 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 expanded, showing permissions for various objects. The 'Billing Process' and 'Laptop Bookings' objects are highlighted. The 'Total Laptops' object is also listed. The 'Session Settings' and 'Password Policies' sections are visible below.

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"/>

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: --None--

Password Policies

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

Lockout effective period: 45 minutes

Roles and Hierarchy

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

Creating owner Role:

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.



- a. Give Label as “owner” and Role name gets auto populated. Then click on Save.

SETUP Roles

Role Edit

New Role

Role Edit

Label owner

Role Name owner

This role reports to CEO

Role Name as displayed on reports

Save Save & New Cancel

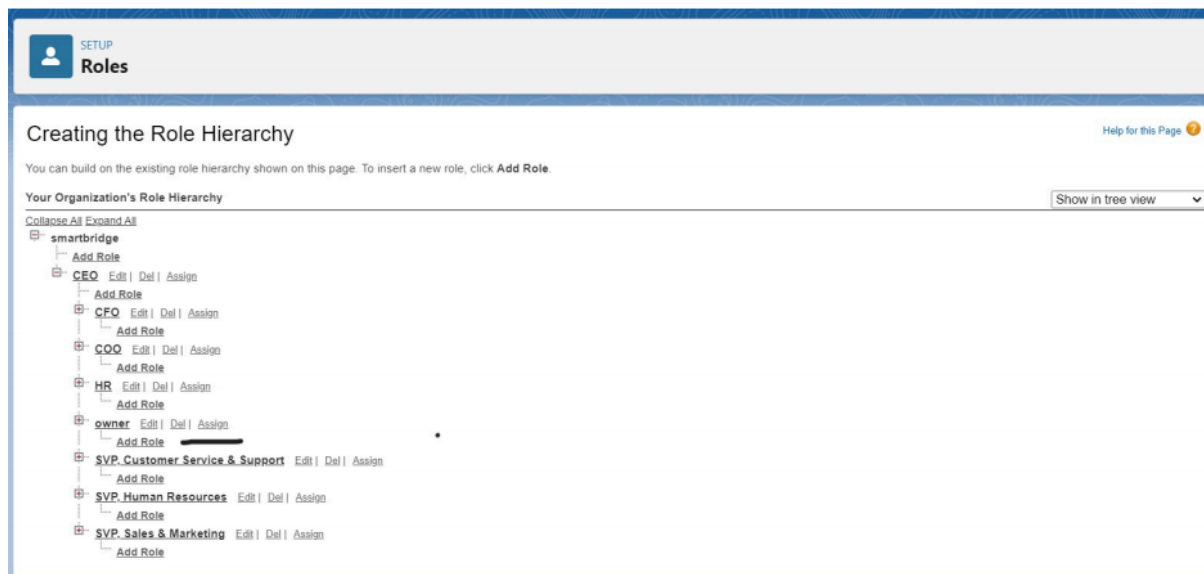
- b. Click and save it.

Activity 2: Creating Agent roles

Creating another two roles under manager

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.



4. 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.

The screenshot shows the 'User Edit' page in Salesforce. At the top, there's a 'SETUP Users' header. Below it, the user's name 'vicky y' is displayed. The main section is titled 'User Edit' and contains a 'General Information' tab. The form is divided into two columns. The left column contains text input fields for: First Name (vicky), Last Name (y), Alias (vy), Email (21501a0574@pvpsit.ac.in), Username (21501a05774@pvpsit.ac.in), Nickname (User1731918161547351929), Title (owner), Company, Department, and Division. The right column contains dropdown menus for Role (owner), User License (Salesforce), and Profile (owner). Below these are several checkboxes for user permissions: Active (checked), Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Data.com User Type (set to --None--), Data.com Monthly Addition Limit (300), Accessibility Mode (Classic Only), High-Contrast Palette on Charts, Load Lightning Pages While Scrolling (checked), and Debug Mode.

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 : standard platform user.

The screenshot shows the 'User Edit' page for a user named 'tarun Babu Kandra'. The page is divided into two main sections: 'General Information' and 'Permissions'. The 'General Information' section contains fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. The 'Permissions' section contains a dropdown for Role, a dropdown for User License, a dropdown for Profile, and a series of checkboxes for various user types: Active, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Data.com User Type, Data.com Monthly Addition Limit, Accessibility Mode (Classic Only), High-Contrast Palette on Charts, Load Lightning Pages While Scrolling, and Debug Mode.

Field	Value
First Name	tarun Babu
Last Name	Kandra
Alias	TKandra
Email	21501a0574@pvpsit.ac.in
Username	tarun123@pvpsit.com
Nickname	User1731904008248272352
Title	
Company	pvpsit
Department	
Division	
Role	<None Specified>
User License	Salesforce
Profile	System Administrator
Active	<input checked="" type="checkbox"/>
Marketing User	<input checked="" type="checkbox"/>
Offline User	<input checked="" type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input checked="" type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>
Site.com Publisher User	<input type="checkbox"/>
WDC User	<input type="checkbox"/>
Data.com User Type	--None--
Data.com Monthly Addition Limit	300
Accessibility Mode (Classic Only)	<input type="checkbox"/>
High-Contrast Palette on Charts	<input type="checkbox"/>
Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
Debug Mode	<input type="checkbox"/>

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.

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.

Create a Flow on dell laptop

1. Go to Setup and type "Flow" in the Quick Find box.
2. Select "Flow" and click "New Flow".
3. Choose "Record-Triggered Flow" and click "Create".
4. Select "Laptop Booking" from the object dropdown.
5. Set the trigger as "A record is Created or Updated".
6. Optimize the flow for "Actions and Related Records".
7. Click "+" under the flow canvas and select "Decision".
8. Set the label to "Update" (API name auto-generates).
9. Add outcomes for Dell, Acer, HP, and Mac.
10. After the laptop model decision, add another decision for core type (i3, i5, i7).
11. Define conditions for core types (e.g., "core type equals i3").
12. Add outcomes for Dell core types (i3, i5, i7).
13. After core type decision, add another decision for months (1-5).
14. Set conditions for months (e.g., "how many months equals 1").
15. Add outcomes for months selected (1, 2, 3, 4, 5).
16. Add an "Update Record" action based on month selection.
17. Set Amount_c values for Dell i3 (1000, 2000, etc.).
18. Repeat the process for Dell i5 and i7 with corresponding amounts.
19. Connect outcomes to the appropriate update record actions.
20. Save and activate the flow.

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

Creating Classes :

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

other related class concepts.

- a. Class:
- b. As in Java, you can create classes in Apex. A class is a template or blueprint from which objects are created. An object is an instance of a class.
- c. Object
Object is an instance of a class, where it can access all the properties that are present in a class i.e, variables and methods.

Steps to create a class in APEX:

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

Trigger code:

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

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

```
    {
```

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

```
    }
```

```
}
```


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

```
public class LaptopBookingHandler {
    public static void sendEmailNotification (List<Laptop_Bookings__c> lapList){
        for(Laptop_Bookings__c lap:lapList)
        {
            Messaging.SingleEmailMessage email = new
                Messaging.SingleEmailMessage(); email.setToAddresses( new
                List<String>{lap.Email__c}); email.setSubject('Welcome to our
                company');
            string body = 'Dear ' +lap.Name +', \n';
                body += 'Welcome to Laptop Rentals! You have been seen as a valuable
                customer to us.\n Please continue your journey with us, while we try to provide
                you with good quality resources. \n Laptop Amount = ' + lap.Amount__c + ' \n core
                type = '+lap.core__c +'
                \n      Laptop      type      =
                '+lap.Laptop_type_      c;
            email.setPlainTextBody(
                body);
            Messaging.sendEmail(new List<Messaging.SingleEmailMessage>{email});

        }
    }
}
```

1. Class name:- LaptopBookingHandler
2. API Name:- Laptop_Bookings__c(as per your org go to laptop booking object and copy from that).
3. core__c (as per your org go to laptop booking object and copy from that). 4.Laptop_type__c.(as per your org go to laptop booking object and copy from that).

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

will get executed.

Create Report

- a. Go to the app -click on the reports tab
- b. Click New Report.
- c. Select report type from category or from report type panel or from search panel “consumer with Laptop Bookings and total laptops”
>> click on start report.
- d. Customize your report
- e. Add fields from left pane as shown below

	Laptop Bookings: Laptop Bookings Name	consumer: consumer Name	Total no of L...	Laptop names	core type	Amount
intermediate (6)	smartinternz	suny	50	Dell	core i3	₹3,000
	smartinternz	sure	50	Dell	core i7	₹4,000
	smartinternz	rakesh	50	Dell	core i5	₹3,000
	smartinternz	suny	50	Acer	core i3	₹2,700
	stacknexus	sure	50	Acer	core i3	₹3,600
	Sandeep	uday	50	Acer	core i3	₹1,800
Subtotal						₹18,100
high (8)	smartinternz	rakesh	50	Mac	Bionic chip	₹8,000
	smartinternz	sure	50	Acer	core i5	₹6,500
	google	rushi	50	Dell	core i5	₹6,000
	Flash	suny	50	Acer	core i7	₹7,200
	shivam	rushi	50	Hp	core i3	₹6,000
	code hub	uday	50	Mac	Bionic chip	₹8,000
	code hub	rushi	50	Mac	Bionic chip	₹8,000
	smartinternz	sure	50	Hp	core i5	₹5,100

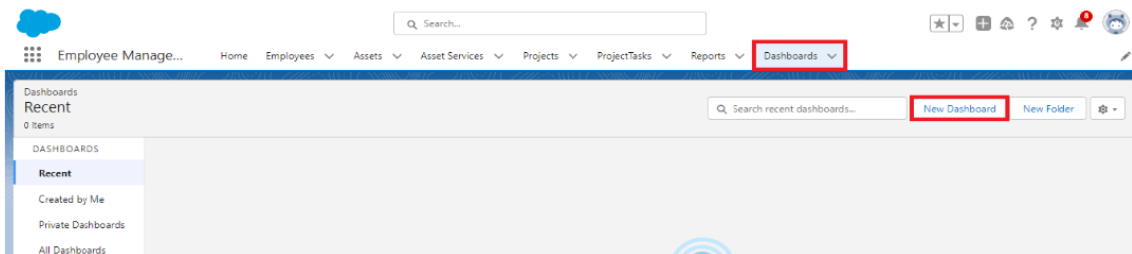
1. Click the column drop down and select bucket list.
2. Click apply it.

Create Dashboard Folder

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

Create Dashboard

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



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

New Dashboard

*Name

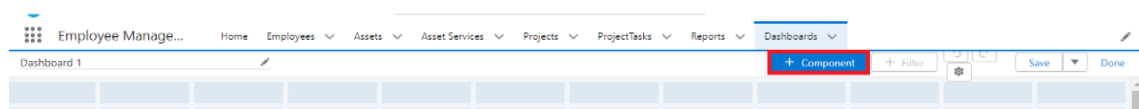
Description

Folder

Select Folder

Cancel 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.

consumer with laptops and total laptops



Sum of Amount

types of versions

high ☒



[View Report \(New Report\)](#)