

# A CRM APPLICATION FOR LAPTOP RENTALS

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# Project Abstract

The CRM application for laptop rentals focuses on delivering rental items to customers. It harnesses the capabilities of customer relationship management (CRM) to enhance customer experiences, streamline store operations, and boost overall efficiency. Furthermore, effective CRM practices include communicating with potential customers through email and ensuring that we engage with those identified as prospects. The key features of the CRM application for laptop rentals are given below:

## 1. User-Friendly Interface

Easy navigation for customers to browse and rent laptops.

## 2. Automated Operations

Streamlines inventory management and order processing to reduce manual errors.

## 3. Data Analytics

Collects and analyzes customer data to optimize marketing strategies and inventory.

## 4. Targeted Email Communication

Engages potential customers with personalized email campaigns to nurture leads.

## 5. Customer Support

Provides easy access to assistance and feedback channels for improved service.

## 6. Performance Tracking

Monitors rental trends and customer satisfaction to enhance service offerings.

|  |          |
|--|----------|
| TASK 1: CREATING DEVELOPER ACCOUNT.....    | 6        |
| TASK 2: ACCOUNT ACTIVATION.....            | 7        |
| <b>OBJECT CREATION.....</b>                | <b>9</b> |
| TASK 3: CREATE TOTAL LAPTOPS OBJECT.....   | 10       |
| TASK 4: CREATE CONSUMER OBJECT.....        | 11       |
| TASK 5: CREATE LAPTOP BOOKINGS OBJECT..... | 12       |
| TASK 6: CREATE BILLING PROCESS OBJECT..... | 13       |

|   |           |
|---|-----------|
| TASK 7: CREATING A CUSTOM TAB.....                                  | 14        |
| <b>THE LIGHTNING APP.....</b>                                       | <b>16</b> |
| TASK 8: CREATE A LIGHTNING APP.....                                 | 16        |
| <b>FIELDS.....</b>  | <b>19</b> |
| TASK 9: CREATINGTHE FIELD IN CONSUMER OBJECT.....                   | 19        |
| TASK 10: CREATING THE FIELD IN LAPTOPS BOOKINGS OBJECT.....         | 22        |
| TASK 11: TO CREATEA FIELDS & RELATIONSHIP TO AN LAPTOP BOOKING..... | 24        |
| TASK 12: TO CREATEA FIELDS & RELATIONSHIP TO AN LAPTOP BOOKING..... | 24        |
| TASK 13: CREATION OF FIELDS & RELATIONSHIP FOR THE BILLING PROCESS. | 30        |
| TASK 14: CREATING THE FIELD IN TOTAL LAPTOPS OBJECT.....            | 33        |
| <b>VALIDATION RULE.....</b>   | <b>34</b> |
| TASK 15: CREATING THE VALIDATION RULE FOR PHONE NUMBER.....         | 35        |
| <b>PROFILES.....</b>  | <b>37</b> |
| TASK 16: OWNER PROFILE.....   | 37        |
| TASK 17: AGENT PROFILE.....   | 38        |
| <b>ROLES AND HIERARCHY.....</b>                                     | <b>40</b> |
| TASK 18: CREATING OWNER ROLE.....                                   | 40        |
| TASK 19: CREATING AGENT ROLES.....                                  | 41        |
| <b>USERS.....</b>   | <b>41</b> |
| TASK 20: CREATE USER.....   | 42        |
| <b>FLOWS.....</b>   | <b>44</b> |
| TASK 21: CREATE A FLOW ON DELL LAPTOP.....                          | 45        |
| TASK 22: CREATING FLOW ON ACER LAPTOP.....                          | 51        |
| TASK 23: CREATING A FLOW ON HP LAPTOP.....                          | 54        |
| TASK 24: CREATINGA FLOW ON MAC LAPTOP.....                          | 57        |
| <b>APEX.....</b>  | <b>61</b> |
| TASK 25: CREATE AN APEX CLASS.....                                  | 63        |
| TASK 26: CREATE AN APEX TRIGGER.....                                | 64        |
| <b>REPORTS.....</b>   | <b>66</b> |
| TASK 27: CREATEREPORT.....  | 66        |
| TASK 28: SHARING REPORT TO OWNER.....                               | 69        |
| <b>DASHBOARDS.....</b>  | <b>71</b> |

## **Introduction**

In the rapidly evolving world of technology, the demand for laptops has never been higher. Laptop rentals have emerged as a convenient and cost-effective solution for individuals and businesses seeking temporary access to powerful computing devices. To effectively manage this growing market, a robust Customer Relationship Management (CRM) application is

essential. The CRM application for laptop rentals serves as a comprehensive platform that streamlines the rental process, enhances customer engagement, and optimizes business operations.

## **Revolutionizing the Laptop Rental Industry**

The introduction of this CRM application revolutionizes the laptop rental industry by providing a centralized system that caters to the needs of both renters and rental providers. By integrating key CRM principles, such as customer data management, targeted communication, and performance tracking, the application ensures a seamless and efficient rental experience.

## **Simplifying the Rental Process for Customers**

One of the primary objectives of the CRM application is to simplify the rental process for customers. Through an intuitive user interface, renters can easily:

1. Browse available laptops
2. Compare specifications
3. Manage their bookings with ease

This convenience not only attracts new customers but also fosters loyalty among existing ones, leading to increased rental volumes and revenue.

## **Empowering Rental Providers with Efficient Tools**

Moreover, the CRM application empowers rental providers with powerful tools to manage their operations effectively. Automated inventory management, order processing, and payment tracking reduce manual errors and save valuable time. This efficiency allows rental providers to focus on delivering exceptional customer service and expanding their business.

### **Data-Driven Insights for Informed Decisions**

By incorporating data-driven insights, the CRM application enables rental providers to make informed decisions based on customer preferences, rental trends, and market demands. This data-driven approach helps optimize inventory levels, tailor marketing strategies, and identify new revenue streams, ultimately driving growth and profitability in the laptop rental industry.

### **A New Standard for Excellence in Laptop Rentals**

The introduction of the CRM application for laptop rentals marks a significant milestone in the evolution of the rental industry. By combining cutting-edge technology with customer-centric principles, this application sets a new standard for excellence in laptop rentals, paving the way for a more efficient, engaging, and profitable future.

### **Salesforce**

Salesforce is a dynamic customer success platform that equips businesses with the tools necessary to excel in sales, service, marketing, analytics, and customer engagement. By providing a centralized solution for managing customer relationships, Salesforce enables organizations to navigate the entire customer journey effectively, from initial outreach to ongoing support. This capability allows for the delivery of personalized experiences that foster loyalty and satisfaction.

The platform is built on a secure cloud infrastructure, ensuring that your data is accessible from anywhere, while also offering the flexibility and scalability required to accommodate business growth and changing needs. Salesforce's extensive range of customizable tools allows organizations to tailor the platform to their unique requirements, enhancing operational efficiency and effectiveness. Additionally, Salesforce boasts a rich ecosystem of applications available through the Salesforce

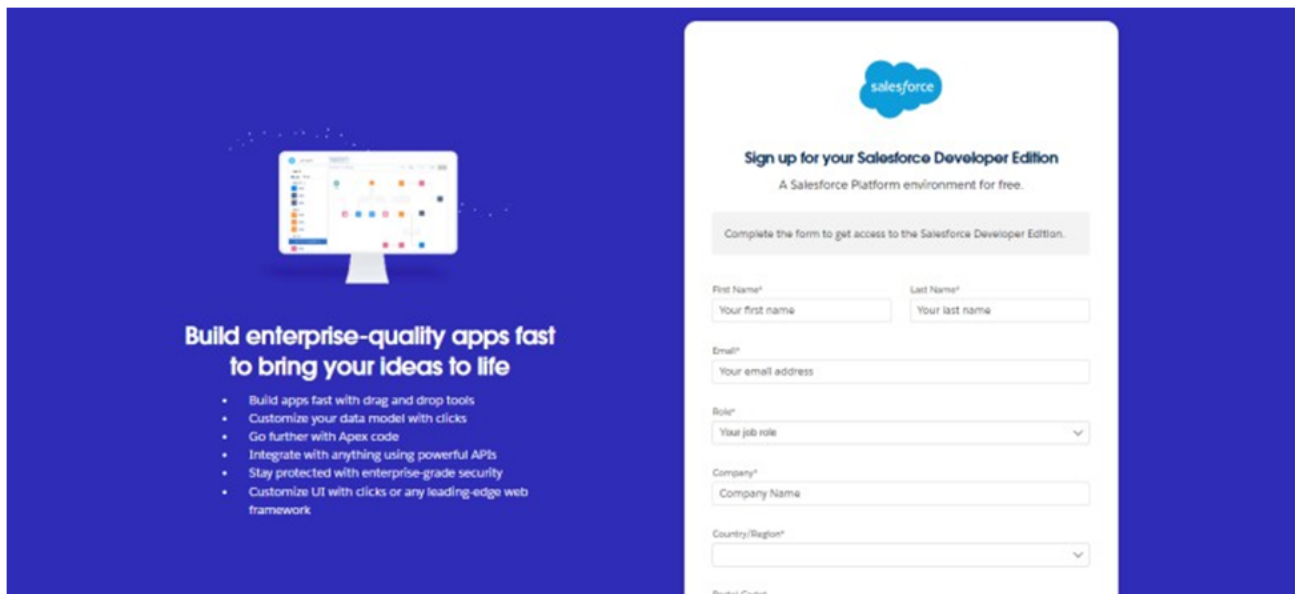
AppExchange, enabling businesses to integrate various functionalities and expand their capabilities seamlessly. This integration fosters collaboration among employees and partners, streamlining workflows and improving communication. By harnessing the power of data analytics, Salesforce provides valuable insights that inform strategic decision-making, helping businesses identify trends, optimize processes, and enhance customer interactions. Ultimately, Salesforce empowers organizations to thrive in a competitive landscape, build lasting relationships with customers, and achieve their strategic objectives, positioning them for long-term success in an ever-evolving market.

## **Task 1: 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 :
  - First name & Last name
  - Email
  - Role : Developer
  - Company : College Name
  - Country : India
  - Postal Code : pin code

- Username : should be a combination of your name and company



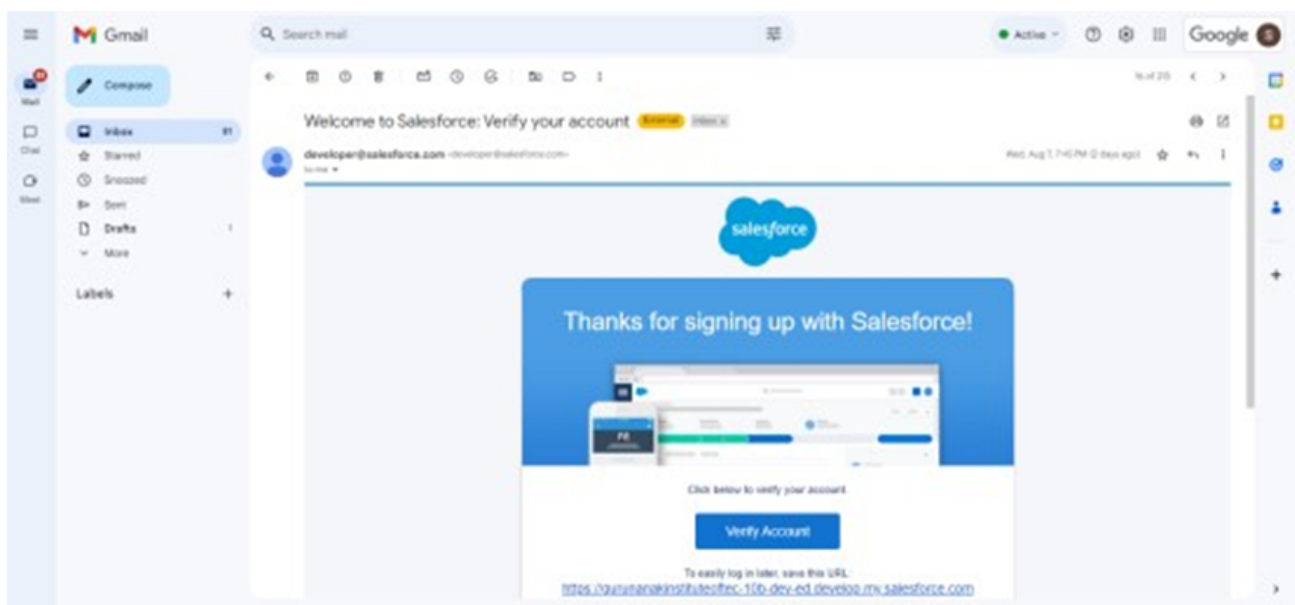
The image shows a promotional banner for Salesforce Developer Edition on the left and a sign-up form on the right. The banner features a computer monitor displaying a Salesforce interface and the text: "Build enterprise-quality apps fast to bring your ideas to life". Below this, a list of features is provided: "Build apps fast with drag and drop tools", "Customize your data model with clicks", "Go further with Apex code", "Integrate with anything using powerful APIs", "Stay protected with enterprise-grade security", and "Customize UI with clicks or any leading-edge web framework". The sign-up form is titled "Sign up for your Salesforce Developer Edition" and "A Salesforce Platform environment for free.". It includes a heading "Complete the form to get access to the Salesforce Developer Edition." and several input fields: "First Name\*", "Last Name\*", "Email\*", "Role\*", "Company\*", "Country/Region\*", and "Brickset Code\*".

This need not be an actual mail id, you can give anything in the format :  
username@organization.com

Click on sign me up afterfilling these.

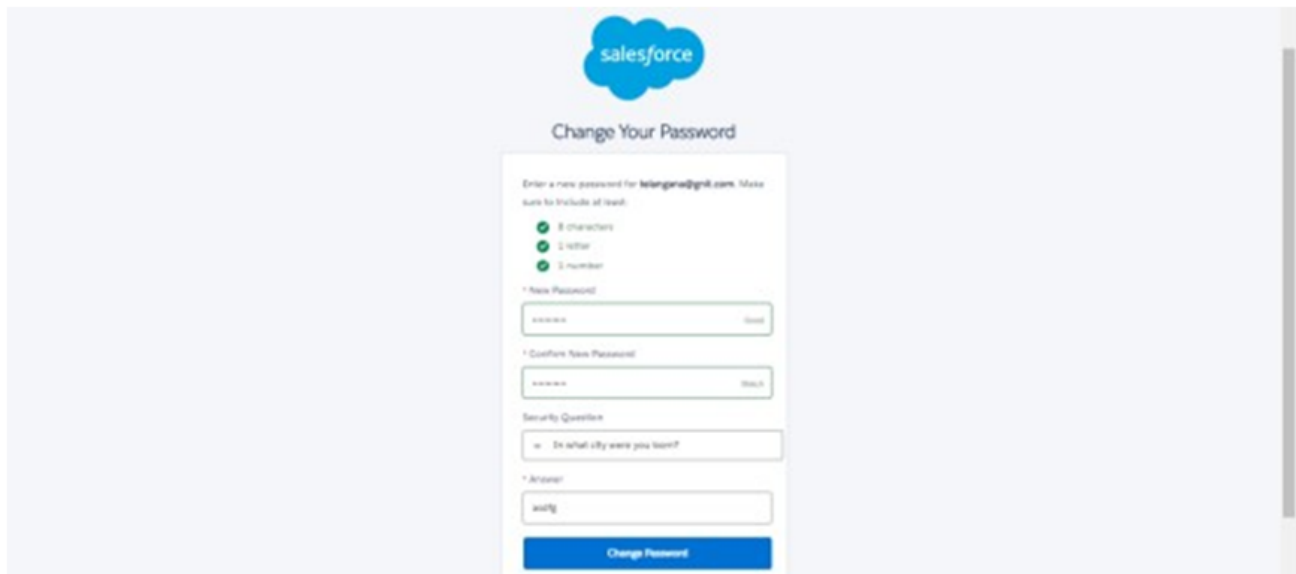
## Task 2: AccountActivation

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 5-10 mins.

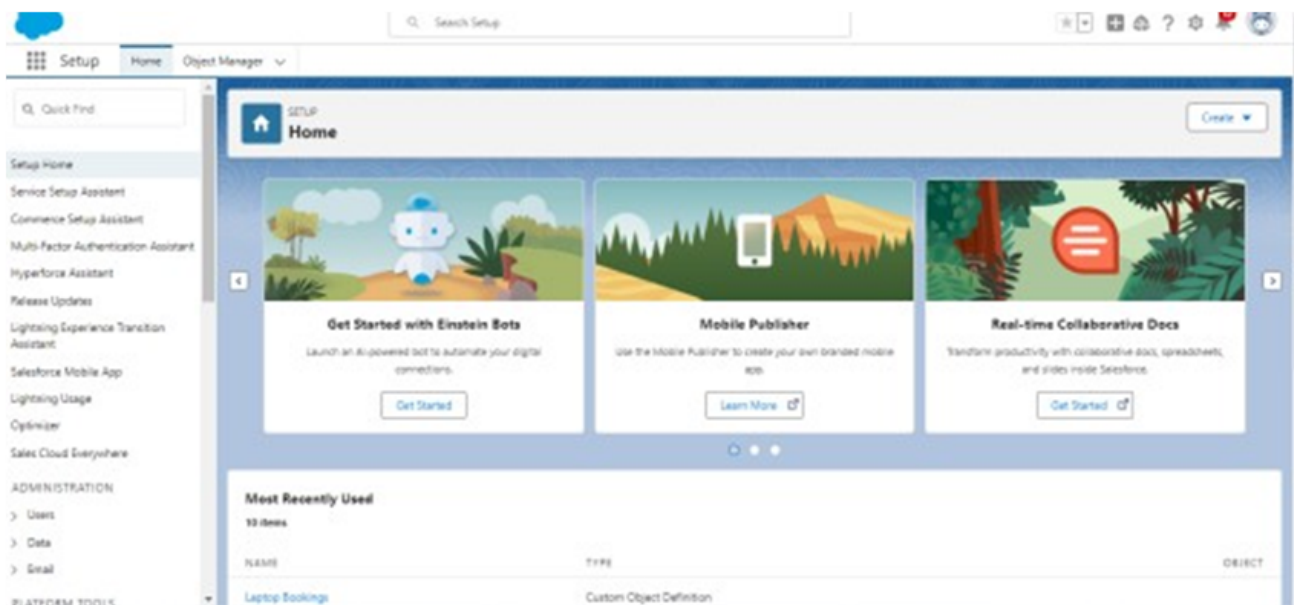


2. Click on VerifyAccount.

3. Give a password and answer a security question and click on change password. Make sure to remember the password. In case you forget the password, you can simply click on 'Forgot password' option to create a new password. An email with the subject "Finish resetting your Salesforce password" will be sent for this process.

The image shows the Salesforce 'Change Your Password' page. At the top is the Salesforce logo. Below it, the title 'Change Your Password' is centered. The form is for the email 'belongprad@gmail.com'. It includes instructions to enter a new password that is at least 8 characters long, contains 2 letters, and 2 numbers. There are input fields for 'New Password' and 'Confirm New Password'. Below these is a 'Security Question' section with a dropdown menu and an input field for the answer. A 'Change Password' button is at the bottom.

4. Then you will redirect to your salesforce setup page.



## Object Creation

### What Is an Object?



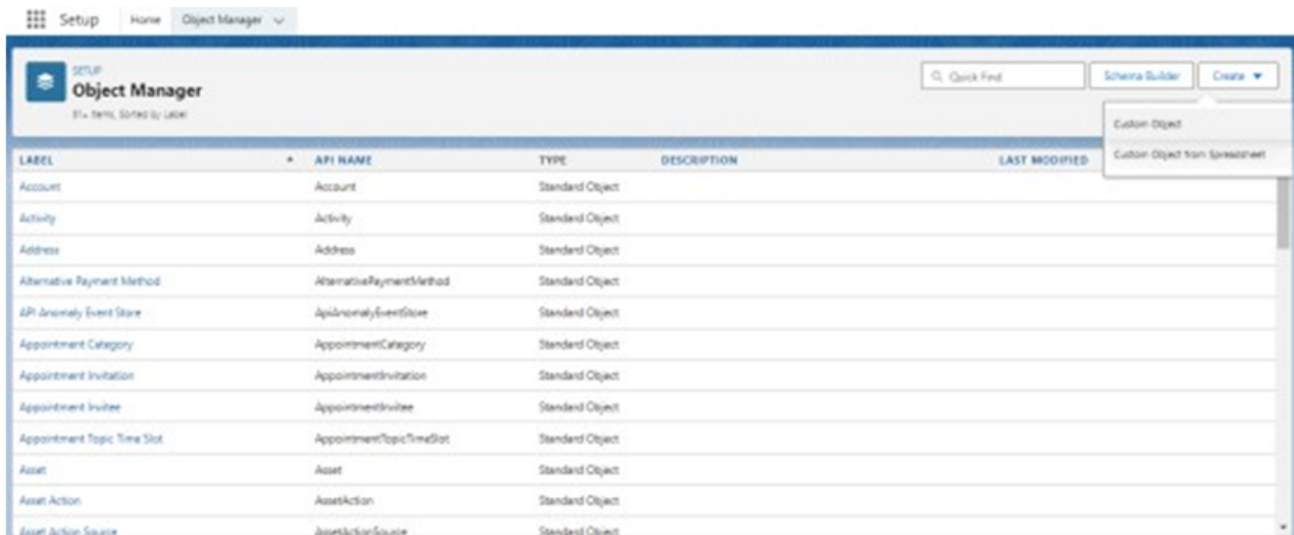
Salesforce objects are database tables that permit you to store data that is specific to an organization. What are the types of Salesforce objects  
Salesforce objects are of two types:

**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 create an object:**

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



2. On Custom object defining page:

3. Enter the label name, plural label name, click on Allow reports, Allow search.

**Setup** | Home | Object Manager

## New Custom Object

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by adding custom profiles. [Get an example](#) [Get an example for resource users](#)

**Custom Object Definition Edit** [Save] [Save & New] [Cancel]

**Custom Object Information** Required Information

The singular and plural labels are used in table, page layouts, and reports.

Label:  Example: Account

Plural Label:  Example: Accounts

Starts with lower sound: ☐

The Object Name is used when referencing the object via the API.

Object Name:  Example: Account

Description:

Context-sensitive help: ☒ Open the standard Salesforce.com help & Training window  
☐ Open a window using a Visualforce page

Context Name:

**Enter Record Name Label and Format**

The Record Name appears in page layouts, key tabs, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name:  Example: AccountName

**Setup** | Home | Object Manager

## New Custom Object

Click Help  Warning: If you plan to insert a high volume of records in this object, use the API. For example, use the Test Data tool.

**Optional Features**

☒ Allow Reports

☐ Allow Search

☒ Track Field History

☐ Allow in Chatter Stream

☐ Enable Learning

**Object Classification**

Other flow settings are enabled. This object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#)

☒ Allow Search

☒ Allow Bulk API Access

☒ Allow Streaming API Access

**Deployment Status** [View & Edit](#)

☐ In Development

☒ Deployed

**Search Status**

When this setting is enabled, your users can find records of this object type when they search. [Learn more](#)

☒ Allow Search

**Object Creation Options (Available only when custom object is first created)**

☐ Add Notes and Attachments related to its related page layout

☐ Launch New Custom Tab Wizard after saving the custom object

[Save] [Save & New] [Cancel]

4. Click on Save.

## Task 3: Create TotalLaptops Object

- From the setup page >>Click on ObjectManager >> 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.

## Task 4: Create ConsumerObject

1. 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.

## Task 5: Create Laptop Bookings Object

1. 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

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

## Task 6: Create BillingProcess Object

1. From the setup page >>Click on Object Manager >> Click on Create>>Click on Custom Object.
  - a. Enter the label name >>Billing Process
  - b. Plural label name >> Billing Process
  - c. 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

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:

### 1. 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.

### 2. 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.

#### 1. Visual force Tabs

Visual force Tabs are custom tabs that display a Visual force page. Visual force tabs look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.

#### 2. Lightning Component Tabs

Lightning Component tabs allow you to add Lightning components to

the navigation menu in Lightning Experience and the mobile app.

### 3. 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.

#### Task 7: Creating A Custom Tab

To create a Tab:

1. Go to the setup page >>Type Tabs in the Quick Find bar >>click on tabs >>New(under custom object tab)

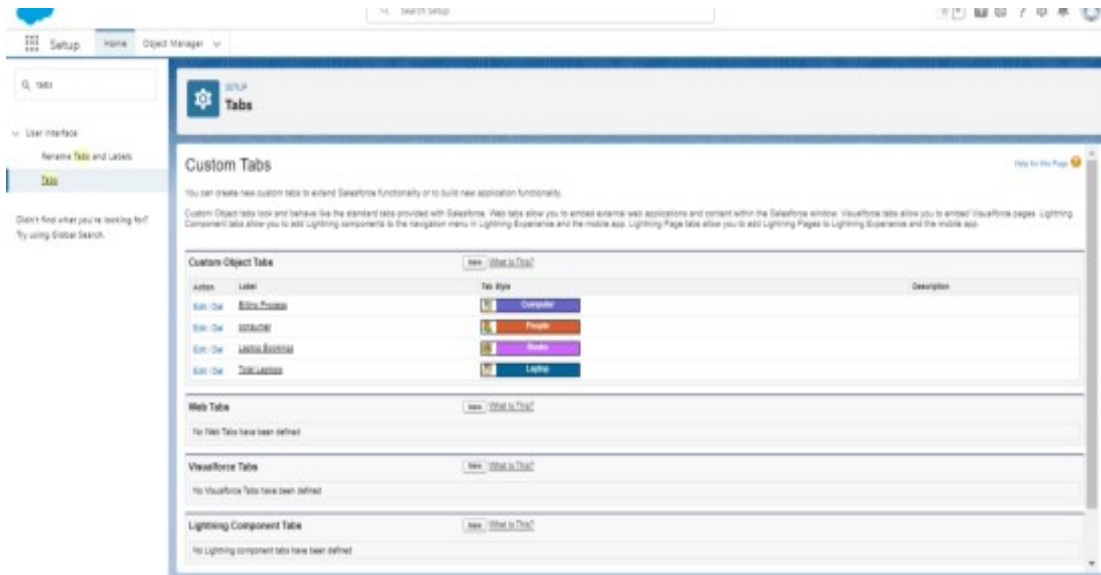


2. Select Object(Total Laptops)>> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) uncheck the include tab.
3. Make sure that the Append tab to users' existing personal customizations is checked.
4. Click save.

#### 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 above.

The final output will be shown as following:



## The Lightning App

In the context of Lightning Experience, a Lightning app is a powerful tool that brings together a collection of related items, such as objects, tabs, and other components, to serve a specific function or purpose. These apps are designed to provide users with a convenient and streamlined way to access the necessary tools and information they need to perform their tasks effectively. By bundling these items into a single Lightning app, users can easily navigate between them using the navigation bar, improving their overall productivity and efficiency. One of the key advantages of Lightning apps is the ability to customize them with a unique color scheme and logo, allowing organizations to reinforce their brand identity and create a cohesive user experience. Additionally, Lightning apps can include a utility bar, which provides users with quick access to frequently used tools and features, further enhancing their workflow and productivity. Another notable feature of Lightning apps is the inclusion of Lightning page tabs, which enable users to switch between different pages or views within the app seamlessly. This functionality allows members of your organization to work more efficiently by easily transitioning between various aspects of their work,

such as sales, service, or marketing, without the need to navigate through multiple applications or interfaces. By leveraging the power of Lightning apps, organizations can empower their employees to work more effectively and efficiently, ultimately driving better business outcomes. The ability to customize and tailor these apps to specific organizational needs, while providing a consistent and intuitive user experience, makes Lightning apps a valuable asset in the Lightning Experience ecosystem.

## **Task 8: Create A LightningApp**

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



Setup Home Object Manager

Q app manager

App

**NEW APP**

Don't find what you're looking for? Try using Global Search.

Lightning Experience App Manager

New Lightning App New Connected App

21 items • Sorted by App Name • Filtered by All applications • Tablet Type

| App Name                 | Developer Name           | Description   | Last Modified Date | App Type  | Mobile L. |
|--------------------------|--------------------------|---|--------------------|-----------|-----------|
| 1 All Tabs               | AllTabSet                |   | 07/06/2014 7:28 pm | Classic   |           |
| 2 Analytics Studio       | Insights                 | Build CRM Analytics dashboards and apps                                 | 07/06/2014 7:28 pm | Classic   | ✓         |
| 3 App Launcher           | AppLauncher              | App Launcher tabs   | 07/06/2014 7:28 pm | Classic   | ✓         |
| 4 Automation             | FlowApp                  | Automate business processes and repetitive tasks                        | 07/06/2014 7:28 pm | Lightning | ✓         |
| 5 Bulk Solutions         | LightningBulk            | Discover and manage business solutions designed for your industry       | 07/06/2014 7:28 pm | Lightning | ✓         |
| 6 Community              | Community                | Sealforce CRM Communities   | 07/06/2014 7:28 pm | Classic   | ✓         |
| 7 Content                | Content                  | Sealforce CRM Content   | 07/06/2014 7:28 pm | Classic   | ✓         |
| 8 Data Manager           | DataManager              | Use Data Manager to view trends, monitor usage, and manage recipes      | 07/06/2014 7:28 pm | Lightning | ✓         |
| 9 Digital Experience     | SealforceCMI             | Manage content and media for all of your sites                          | 07/06/2014 7:28 pm | Lightning | ✓         |
| 10 LAPTOP RENTALS        | Ukita                    |   | 06/06/2014 1:28 pm | Lightning | ✓         |
| 11 Lightning Usage App   | LightningInstrumentation | View Adoption and Usage Metrics for Lightning Experience                | 07/06/2014 7:28 pm | Lightning | ✓         |
| 12 Marketing CRM Classic | Marketing                | Track sales and marketing efforts with CRM experts                      | 07/06/2014 7:28 pm | Classic   | ✓         |
| 13 Platform              | Platform                 | The fundamental Lightning Platform                                      | 07/06/2014 7:28 pm | Classic   | ✓         |
| 14 Queue Management      | QueueManagement          | Create and manage queues for your business                              | 07/06/2014 7:28 pm | Lightning | ✓         |
| 15 Sales                 | Sales                    | The world's most popular sales force automation (SFA) solution          | 07/06/2014 7:28 pm | Classic   | ✓         |
| 16 Sales                 | UkitaSales               | Manage your sales process with accounts, leads, opportunities, and more | 07/06/2014 7:28 pm | Lightning | ✓         |

- 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.

New Lightning App

App Details & Branding

Give your Lightning app a name and description, upload an image and choose the highlight color for its navigation bar.

App Details

\*App Name

LAPTOP RENTALS

\*Developer Name

LAPTOP RENTALS

Description

Enter a description.

App Branding

Image

Primary Color Hex

Value

#0070C2

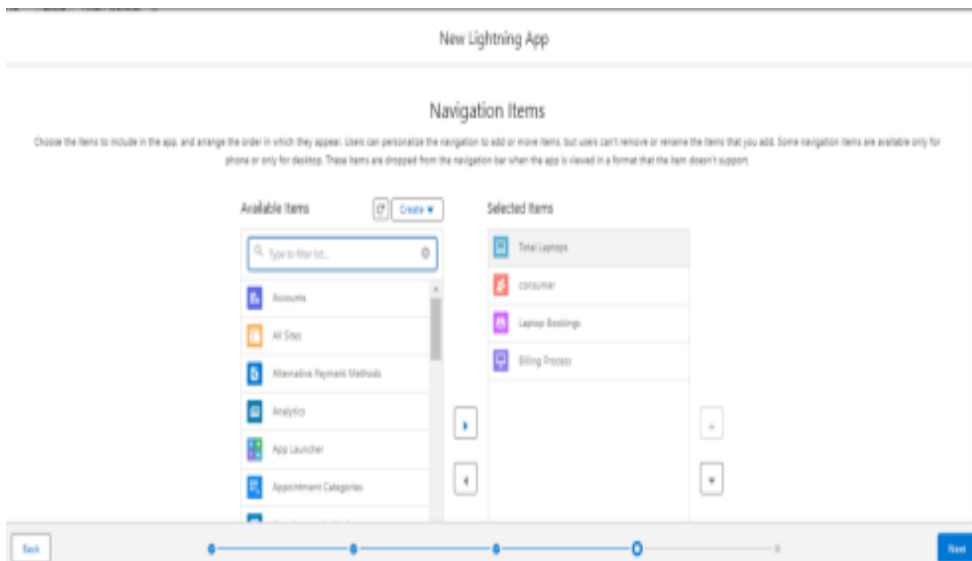
Or

Or Theme Options

☐ Use the app's image and color instead of the org's system theme

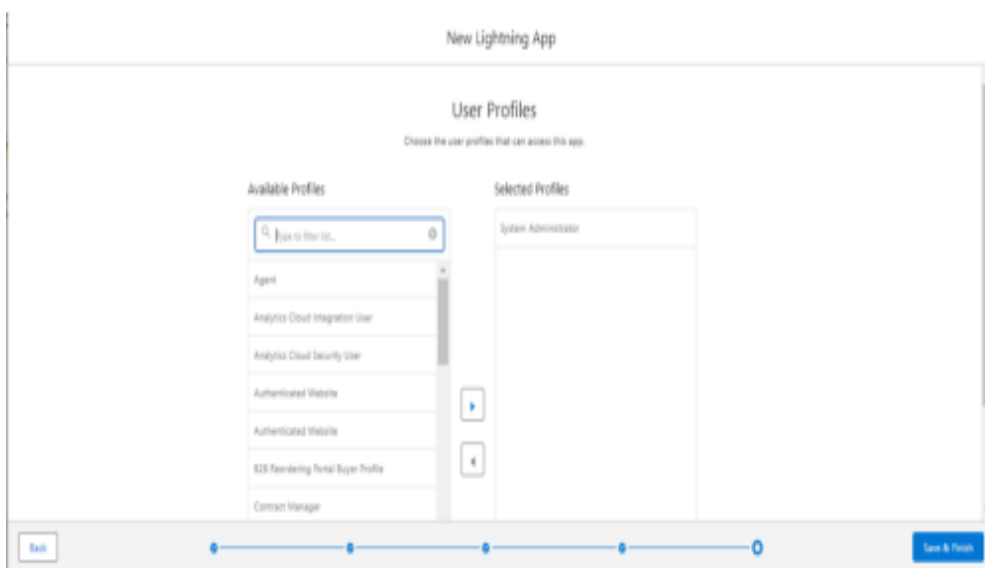
Save

- 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.

5. To Add User Profiles:



Search profiles (System administrator) in the search bar >> click on the arrow button >> save & finish.

## Fields

In the context of Salesforce, fields serve as the fundamental building blocks for storing data within objects, which are akin to tables in a relational database. These fields can hold a wide range of valuable information tailored to the specific requirements of each object, making the processes of searching, deleting, and editing records more efficient

and user-friendly. There are two main types of fields in Salesforce:

## **Standard Fields**

Standard fields are pre-defined by Salesforce and serve specific purposes. It's important to note that while users can freely delete non-required standard fields, they cannot delete required standard fields.

Some standard fields that are commonly found across Salesforce applications include:

- Created By: Identifies the user who created the record
- Owner: Specifies the user or queue responsible for the record
- Last Modified: Indicates the user who last modified the record
- Fields created during object creation

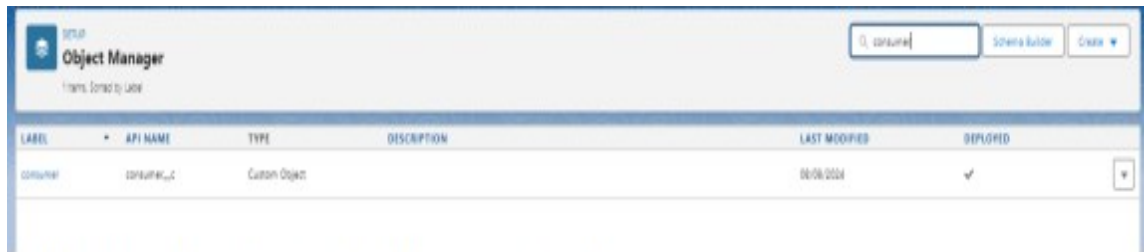
## **Custom Fields**

Custom fields offer a high degree of flexibility, allowing users to modify them according to their unique requirements. Organizations can create custom fields as needed, and they are not always required to be included in records, unlike standard fields. The decision to include or exclude custom fields is at the discretion of the user, providing a level of customization that caters to specific business needs. By leveraging both standard and custom fields, Salesforce users can effectively manage and organize their data, streamlining processes and enhancing overall efficiency within their Salesforce applications.

## **Task 9: Creating The Field In Consumer Object**

To create fields in an object:

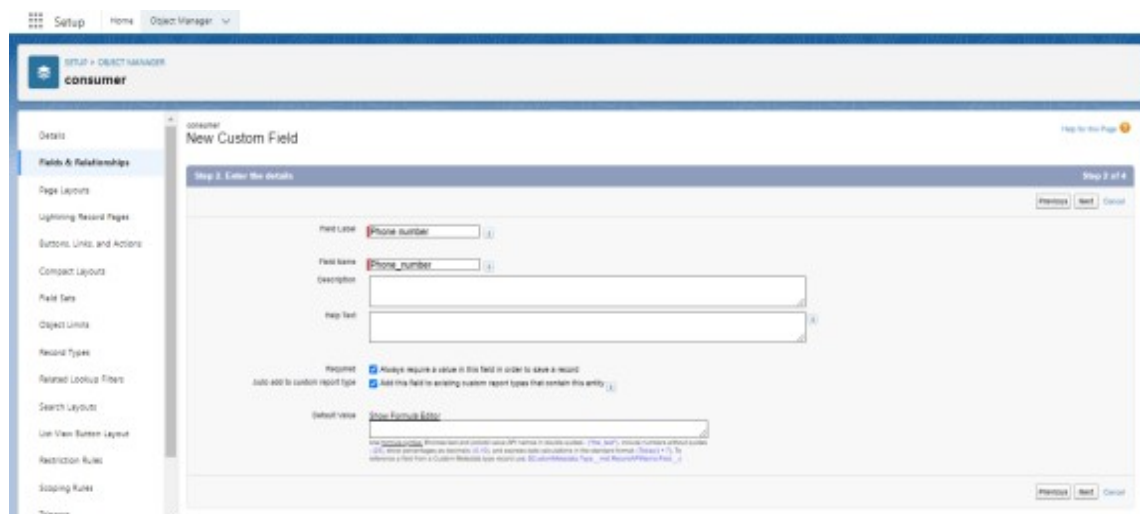
1. Go to setup >> click on Object Manager >> type object name (consumer) in search bar >> click on the object



| LABEL    | API NAME   | TYPE          | DESCRIPTION | LAST MODIFIED | DEPLOYED |
|----------|------------|---------------|-------------|---------------|----------|
| consumer | CONSUMER_C | Custom Object |             | 08/06/2024    | ✓        |

2. Now click on "Fields & Relationships" >> New
  3. Select Data Type as a "Phone"
  4. Click on next
- Fill the Above as following:
  - Field Label: Phone number

1. Field Name : gets auto generated
2. Click the required option checkbox.
3. 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

User View Button Layout

Restriction Rules

Stepping Rules

Triggers

consumer

New Custom Field

Step 3: Enter the details

Field Label: Phone number

Field Name: Phone\_number

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: New Formula Editor

Step 3 of 4

Previous Next Cancel

**To create another fields in an object:**

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

## 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 “Text Area” and Click on Next
4. 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.

The screenshot shows the Salesforce Setup interface with the 'consumer' object selected. The 'New Custom Field' wizard is open, and the 'Fields & Relationships' section is active. The wizard is at Step 2 of 4, 'Enter the details'. The 'Field Label' is 'Status', 'Field Name' is 'Status', and 'Data Type' is 'Picklist'. The 'Required' checkbox is checked. The 'Default Value' is 'None From Picklist'. The 'Field Name' is auto-generated as 'Status'.

## 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 “Picklist” and Click on Next
4. Fill the Above as following:
  - Field Label: consumer Status
  - Value - Select enter values with each value separated by a new line
  - Student
  - Employee
  - Others
  - Select required
  - 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

Sorting Rules

Triggers

Step 3: Enter the details

Field Label: consumer Status

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

Student  
Employee  
Others

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

Field Name: consumer\_status

Description:

Help Text:

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

## Task 10: Creating The Field In Laptops BookingsObject

### 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. Picklist values are:-1.Dell 2. Acer 3.Hp 4.Mac

Setup > OBJECT MANAGER  
Laptop Bookings

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Sorting Rules

Triggers

Step 3: Enter the details

Field Label: Laptop names

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

Dell  
Acer  
Hp  
Mac

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

Field Name: Laptop\_names

Description:

Help Text:

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

5. Select required

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

## 2. To Create a Fields & Relationship to an LaptopBooking 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 4.Bionic chip.

The screenshot shows the Salesforce 'New Custom Field' setup page for the 'Laptop Bookings' object. The page is titled 'Step 3: Enter the details' and shows the configuration for a new picklist field. The 'Field Label' is 'Core type'. The 'Field Name' is 'Laptop\_booking'. The 'Field Type' is 'Picklist'. The 'Values' section shows a list of values: 'Core i3', 'Core i5', 'Core i7', and 'Bionic chip'. The 'Display values alphabetically' checkbox is checked. The 'Use first value as default value' checkbox is unchecked. The 'Restrict picklist to the values defined in the value set' checkbox is checked. The 'Field Name' is 'Laptop\_booking'. The 'Field Description' is empty. The 'Help Text' is empty. The page has a 'Next' button and a 'Cancel' button.

## 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.

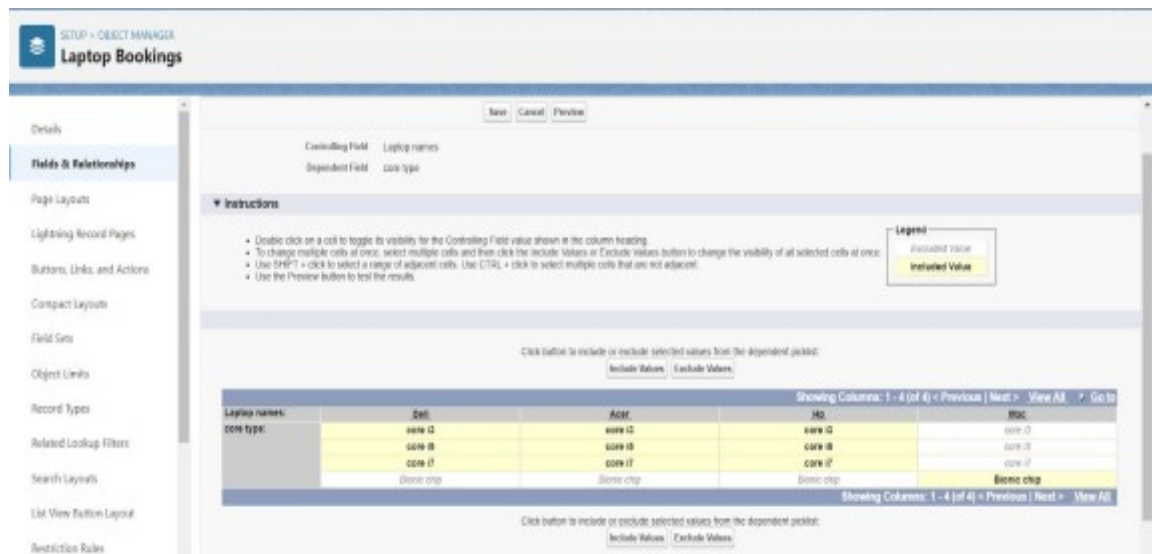
## Task 11: To Create A Fields & Relationship To An Laptop Booking Object

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. Click field dependency and next
3. 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 the Mac bionic chip include the values for it



## Task 12: To Create A Fields & Relationship To An Laptop Booking Object

1. 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 “Lookup 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:Name
  - Field Name :It's gets auto generated
7. Click on Next >>Next >> Save and new

Setup > OBJECT MANAGER  
Laptop Bookings

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

Laptop Bookings  
New Relationship

Step 3. Enter the label and name for the lookup field

Field Label: Name  
Field Name: Name  
Description:  
Help Text:

Cross-Relationship Name: Laptop\_Bookings

Required: ☒ Always require a value in this field in order to save a record  
What to do if the lookup record is deleted: ☒ Clear the value of this field. You can't choose this option if you make this field required.  
☐ Don't allow deletion of the lookup record that's part of a lookup relationship

Rule add to custom report type: ☒ Add this field to existing custom report types that contain this entity.

Lookup Filter  
Optionally create a filter to limit the records available to users in the lookup field. [Set the filter](#)

## 2. 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

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

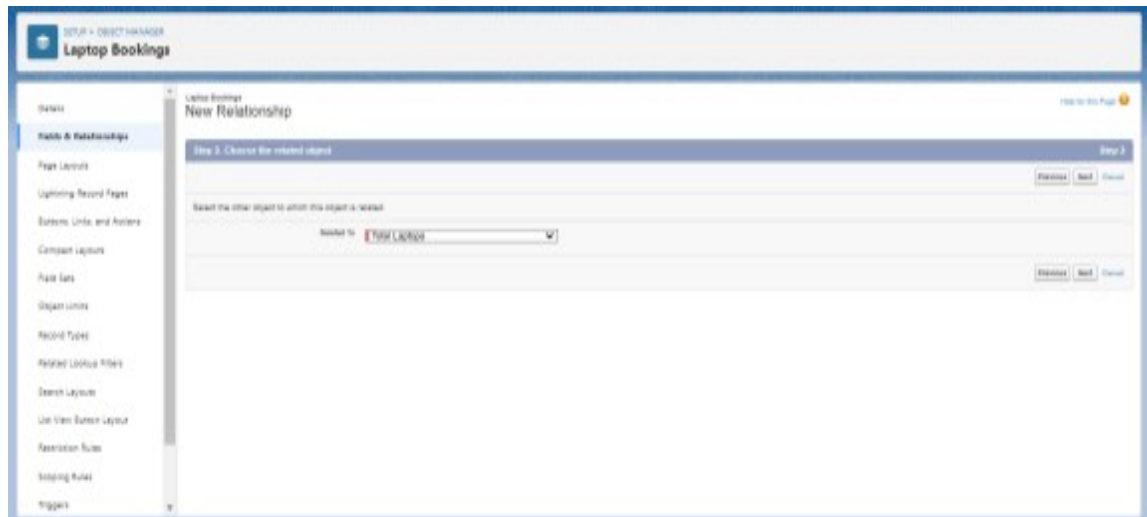
### 3. To Create a Fields & Relationship to an Object:

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.

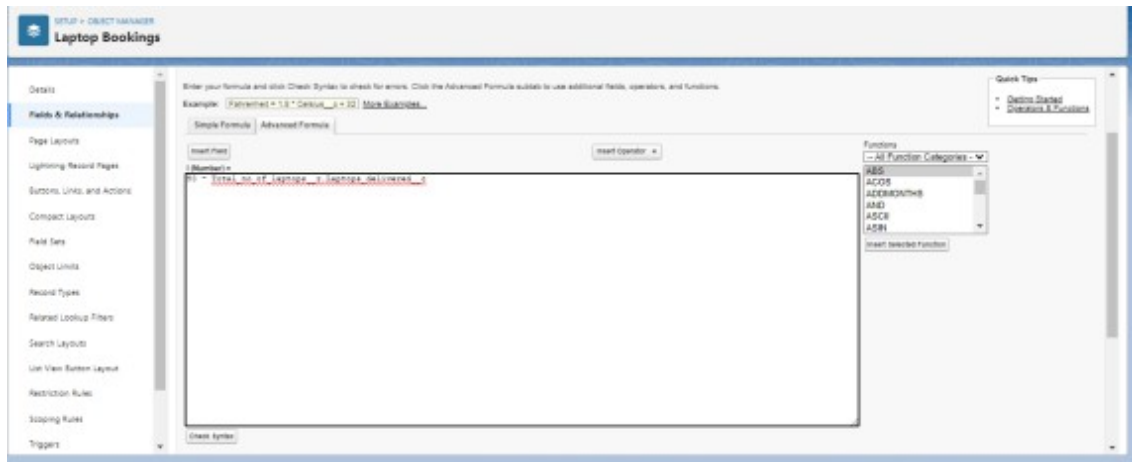
4. To Create a Fields & Relationship to an LaptopBooking Object:

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

| FIELD LABEL          | FIELD NAME            | DATA TYPE                  | CONTROLLING FIELD | INDEXED |
|----------------------|-----------------------|----------------------------|-------------------|---------|
| Amount               | Amount_c              | Currency(15, 0)            |                   |         |
| core type            | core_c                | Picklist                   | Laptop names      |         |
| Created By           | CreatedById           | Lookup(User)               |                   |         |
| Laptop Bookings Name | Name                  | Text(30)                   |                   | ✓       |
| Laptop names         | Laptop_type_c         | Picklist                   |                   |         |
| Last Modified By     | LastModifiedById      | Lookup(User)               |                   |         |
| Name                 | Name_c                | Master-Data(consumer)      |                   | ✓       |
| Total no of laptops  | Total_no_of_Laptops_c | Master-Data(Total laptops) |                   | ✓       |

## 6. To create fields in an object:

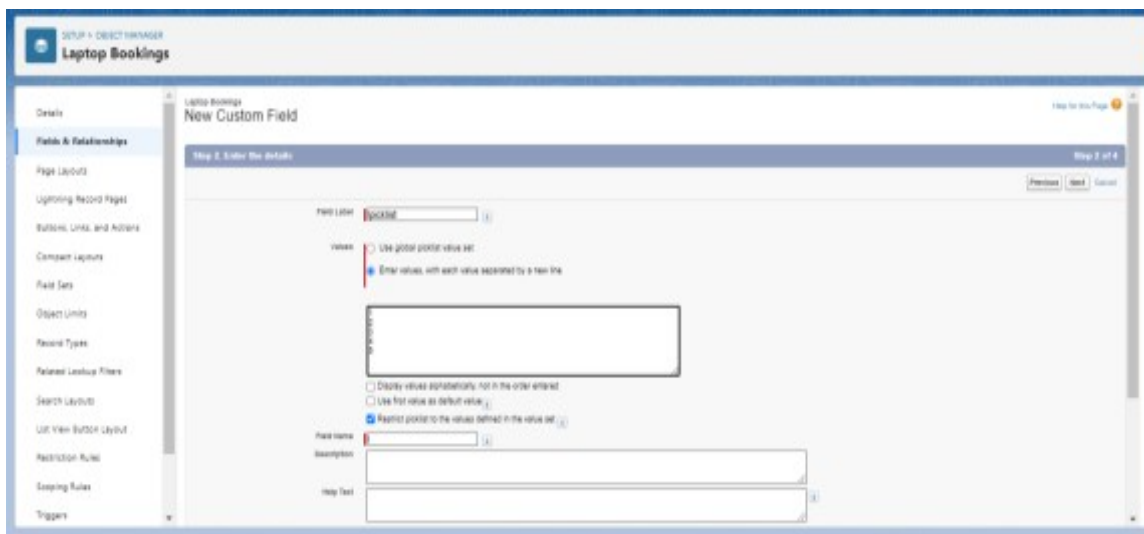
1. Go to setup>> click on Object Manager>> type object name(LaptopBooking) in the search bar >> click on the object.
2. Now click on “Fields & Relationships” >>New
3. Select Data type as a “Formula” and Click on Next
4. Fill the Above as following:
  - Field Label: Laptops Available
  - Field Name : It's gets auto generated
  - Select the Formula Return Type as “Number”
  - Select the Decimalplaces as “0” and Click on Next
  - Click on the AdvancedFormula and Enterthe value in formula box “ 50 - ”and Click on insert field than you will find a pop window underthe 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

## 7. To create fields in an object:

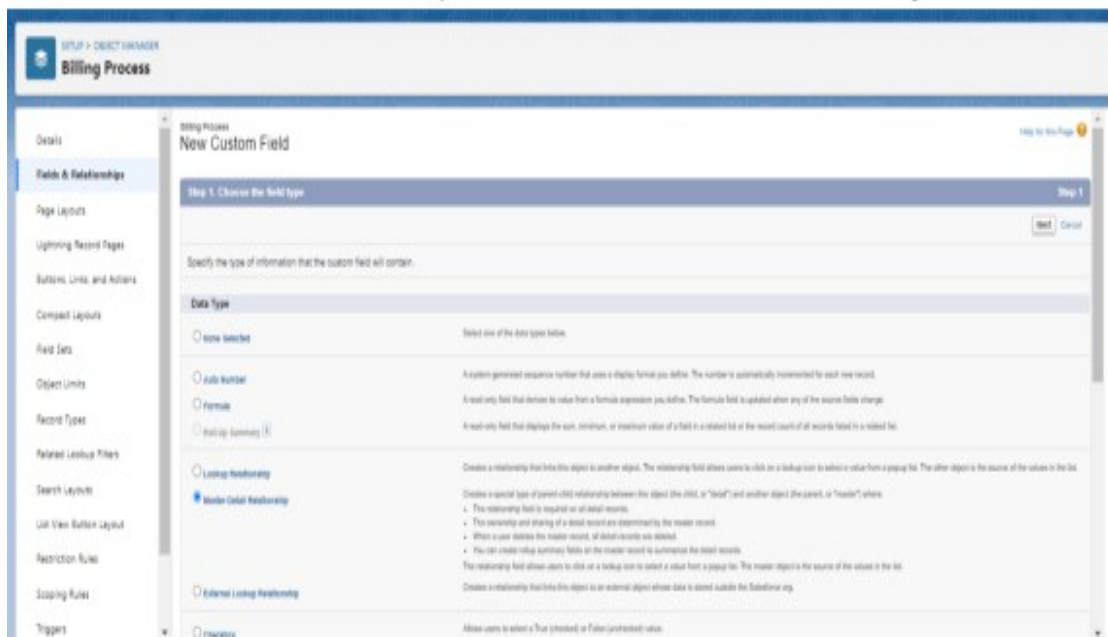
1. Go to setup>> click on Object Manager>> type objectname(LaptopBooking) in the search bar >> click on the object.
2. Now click on “Fields & Relationships” >>New
3. Select Data Type as a “picklist” and give the field label as “laptoppicklist”.
4. Picklist values are 1.2.3.4.5
5. Click and save it.



## Task 13: Creation Of Fields & Relationship For Billing ProcessObject

### 1. To create fields & relationship to an object:

1. Go to setup >> click on ObjectManager >> 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. Fill the Above as following:

- Change the Field Label: Name
- Field Name :It's gets auto generated
- Click on Next >> Next >> Save and new.

### 1. To create anotherfields & relationship to an object:

1. Go to setup >> click on ObjectManager >> type object name(BillingProcess

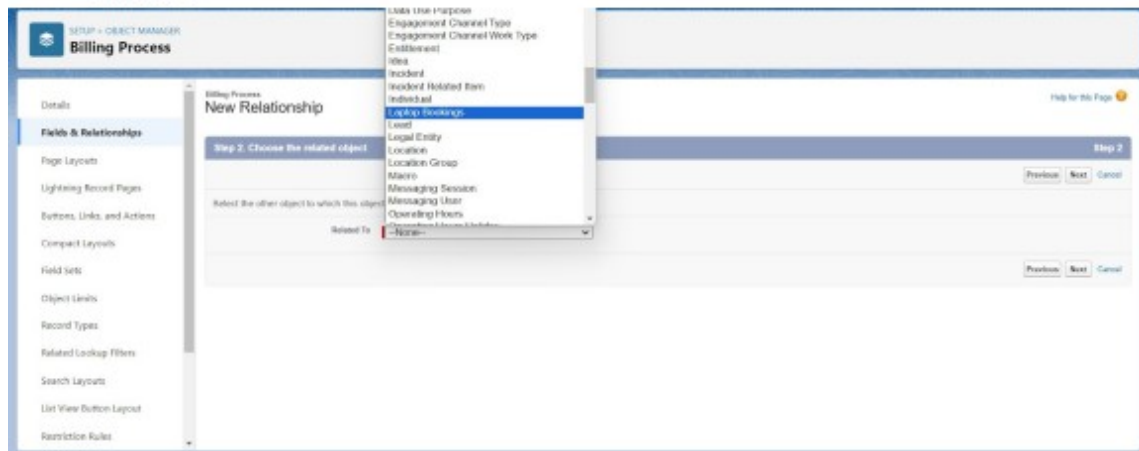
in the search bar >> click on the object.

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 LaptopBooking object and click on Next



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

1. Go to setup >> click on ObjectManager >> type object name(BillingProcess) in the search bar >> click on the object.

2. Now click on “Fields & Relationships” >>New

3. Select Data Type as a “Picklist”

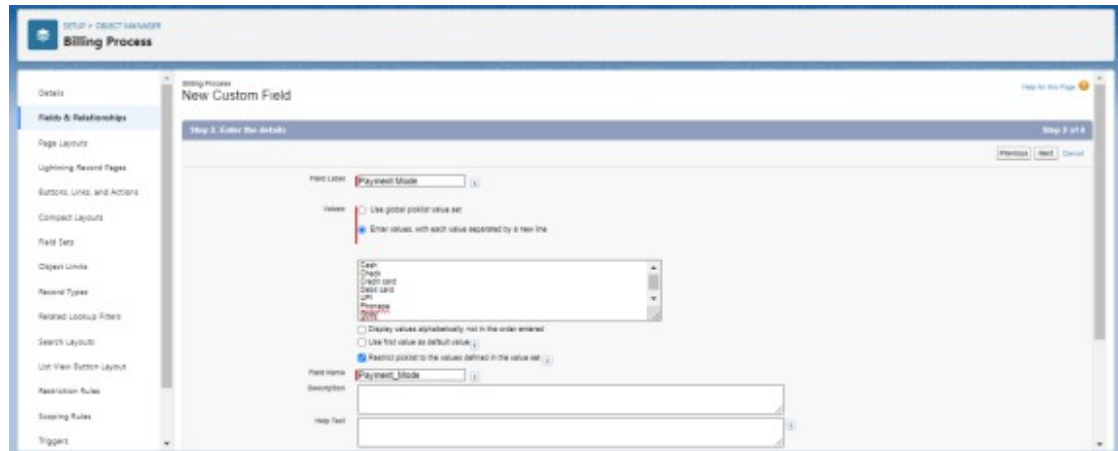
4. Fill the Above as following:

- Field Label: PaymentMode
- Value >> Select entervales with each value separated by a new line
  1. Cash
  2. Check
  3. Credit card
  4. Debit card
  5. UPI



6. Phonepe

7. Gpay



## Cross Object Formula Field:

In Salesforce, a cross-object formula field allows you to create a formula that references fields from related objects. It enables you to perform calculations or display data from related records without the need for custom code or complex workflows. Why do we need to create the Cross Object Formula Field:

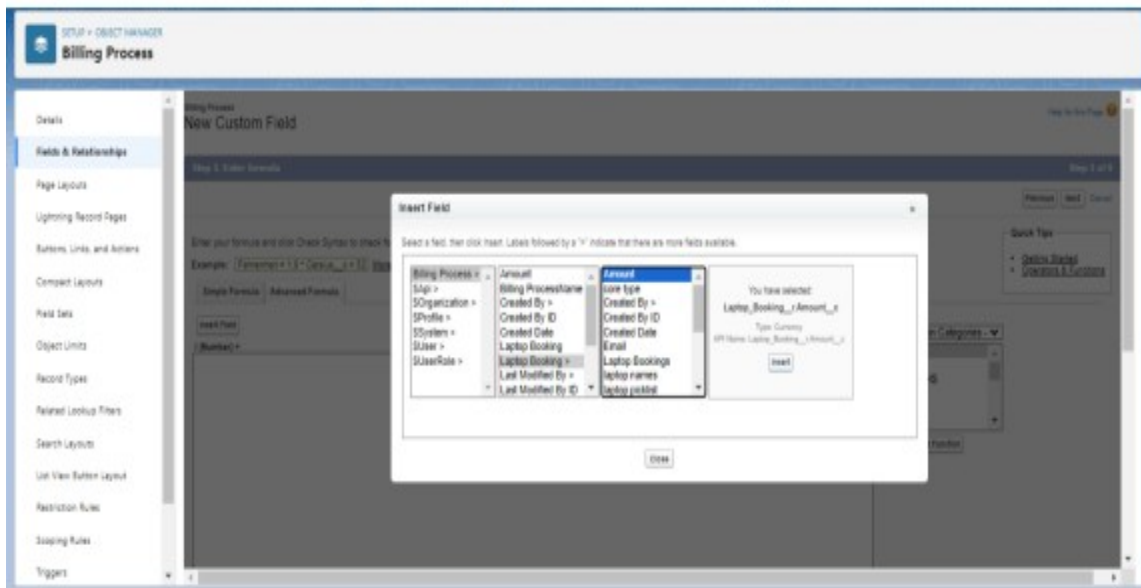
If we want to get the Particular field from another object in that case we will use the Cross

object Formula field. For that First we need to create the relationship b/w two objects and relate the field with formula data type.

## 4. Create a Cross object formula Field in billing process Object:

1. Go to setup >> click on ObjectManager >> type object name(BillingProcess) 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



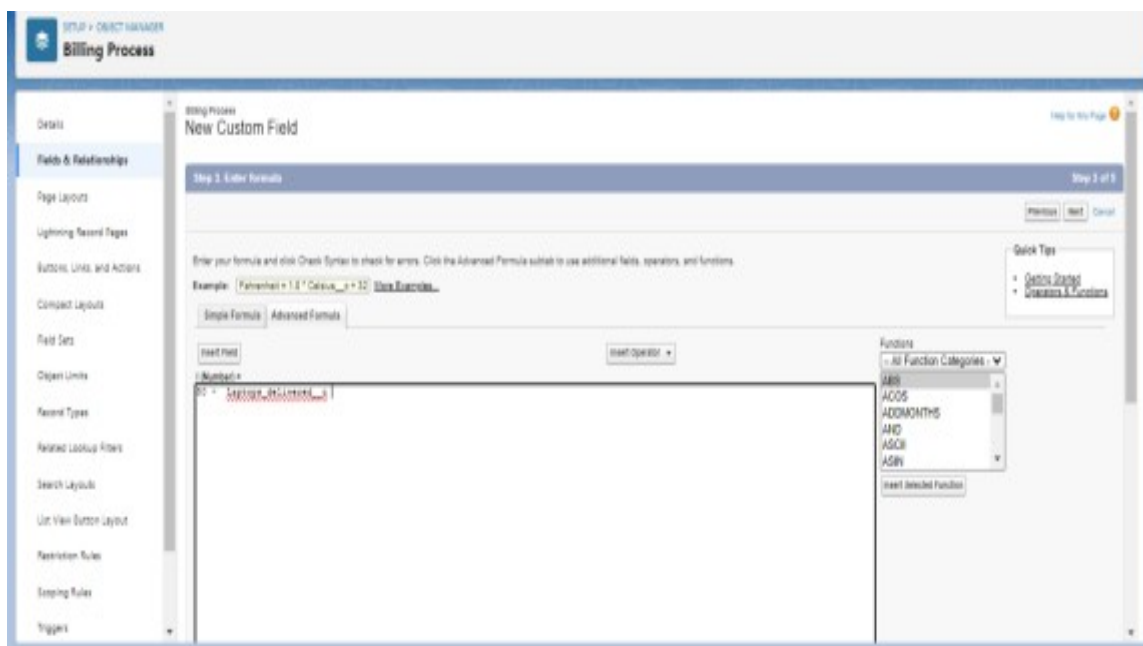
9. Click on Next >> Next >> Save and new.



## Task 14: 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(TotalLaptops) 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



## Validation Rule

Validation rules in Salesforce are mechanisms that ensure data entered into records meets predefined criteria. When a user attempts to save a record, the validation rule evaluates the data and triggers an error message if it does not satisfy the specified conditions, preventing the

record from being saved until the issues are resolved.

The main purpose of validation rules is to maintain high data quality by enforcing standards that align with business requirements. They consist of a formula or expression that assesses the data entered in

one or more fields, returning a Boolean value of "True" if the data is invalid and "False" if it is valid. Each validation rule includes an error message that provides users with clear guidance on what went wrong, along with the option to specify where the error message appears. By implementing validation rules, organizations can improve data quality, provide user guidance, ensure consistency across records, and reduce errors, ultimately optimizing their data management practices. In summary, validation rules are a powerful feature in Salesforce that play a critical role in maintaining data integrity and quality. By applying specific criteria to the data entered by users, these rules help

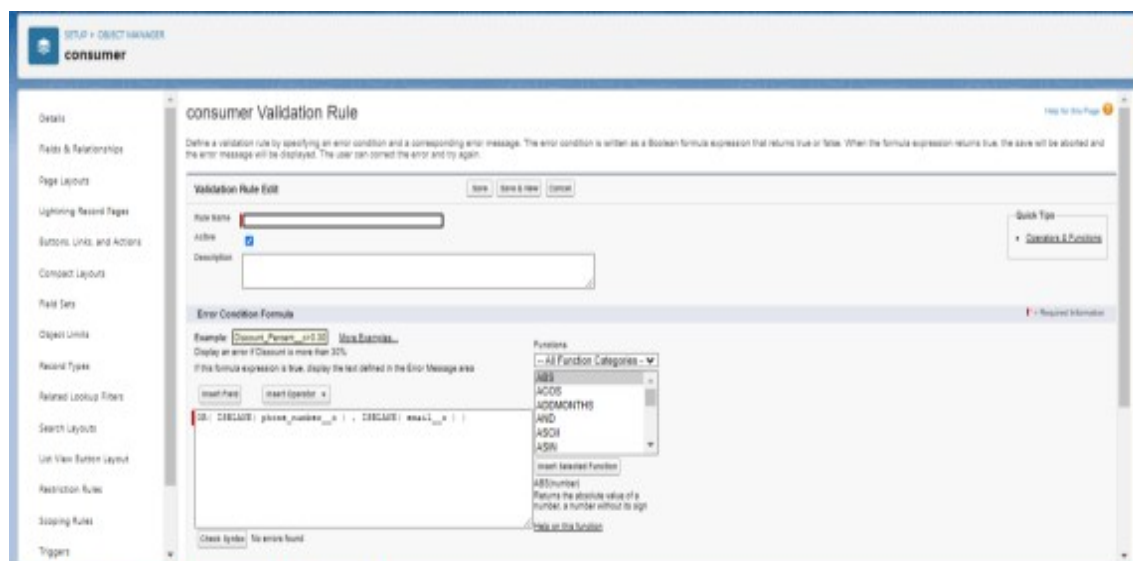
organizations ensure that their information is accurate, consistent, and reliable. The combination of formulas, error messages, and user guidance makes validation rules an invaluable asset for any organization looking to optimize its data management practices.

## **Task 15: 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.

- Enter the Rule name as  
“Phonenumberoremailblankrule”.
- Enter the description as “phone numberand email numbershould not be blank”.
- Enter the formula as “OR(ISBLANK(phone\_number\_\_c ) , ISBLANK( email\_\_\_\_\_c ) )” and check the syntax.



3. Save the validation rule.

## Profiles

A profile in Salesforce is a collection of settings and permissions that define what a user can do within the platform. Profiles control various aspects, including:

- Object permissions: Determine which objects a user can access and what actions they can perform (create, read, edit, delete)

- Field permissions: Specify which fields a user can view and edit within an object
- User permissions: Define additional permissions for users, such as the ability to manage other users or reset passwords
- Tab settings: Control which tabs are visible and accessible to users
- App settings: Determine which apps a user can access and use
- Apex class access: Specify which Apex classes a user can execute
- Visualforce page access: Define which Visualforce pages a user can access
- Page layouts: Determine the layout and sections displayed on pages for specific objects
- Record Types: Specify which record types are available to users
- Login hours & Login IP ranges: Restrict user access based on specific hours or IP addresses
- Profiles are typically defined based on a user's job function, such as SystemAdministrator, Developer, or Sales Representative. This allows for the creation of tailored permissions that align with the responsibilities and needs of different roles within an organization.

## **Types of Profiles in Salesforce**

1. Standard Profiles: Salesforce provides a set of predefined standard profiles by default
2. Custom Profiles: Custom profiles are created by the organization to suitspecific needs

By leveraging profiles, Salesforce administrators can ensure that users have access to the necessary objects, fields, and functionality required for their roles while maintaining security and data integrity within the platform.

## **Task 16: 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

Profiles

Profile Detail

Name: OWNBOT

User License: Salesforce

Description:

Created By: Latha Sai, 08/08/2024, 12:07 pm

Modified By: Latha Sai, 08/08/2024, 12:40 pm

Page Layouts

| Standard Object Layouts    | Custom Object Layouts            |
|----------------------------|----------------------------------|
| Global Layout              | Location Group Assignment Layout |
| Email Application          | Work Type                        |
| Home Page Layout           | Work Type Group                  |
| Account Layout             | Work Type Group                  |
| Alternative Payment Method | Work Type Group                  |
| Appointment Invitation     | Work Type Group                  |
| Asset                      | Work Type Group                  |

- 2.. Scroll down to Custom Object Permissions and Give access permissions for Total Laptops, consumers , Laptop Booking and Billing Process objects as mentioned in the below diagram.

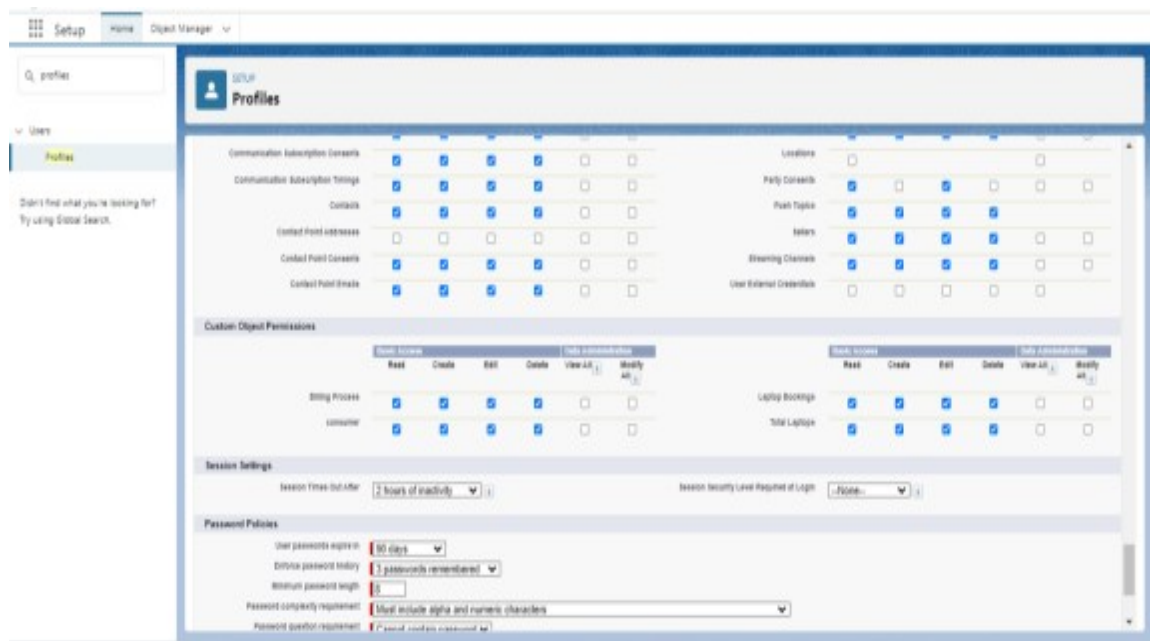
Custom Object Permissions

| 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"/> |
| Location        | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Work Type       | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Work Type Group | <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"/> |
| Laptop Booking  | <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.

## Task 17: Agent Profile

1. Go to setup >> type profiles in quick find box >>click on profiles>> clone the desired profile (Standard Platform User)>> enter profile name (Agent) >>Save.
2. While still on the profile page, then click Edit.
3. Scroll down to Custom Object Permissions and Give access permissions for Total Laptops, consumer, Laptop Bookings and Billing Process objects as mentioned in the below diagram.



4. Give access and save it.

## Roles And Hierarchy

In Salesforce, a role determines a user's visibility and access at the record level. Roles are utilized to define the types of data access that individuals within your Salesforce organization can have. Essentially, roles outline what information a user is able to see within the Salesforce environment.



## Types of Roles in Salesforce

### 1. Standard Roles:

Salesforce provides predefined standard roles that come with a default set of permissions for accessing various records. These roles are integral to the platform's functionality and cannot be deleted.

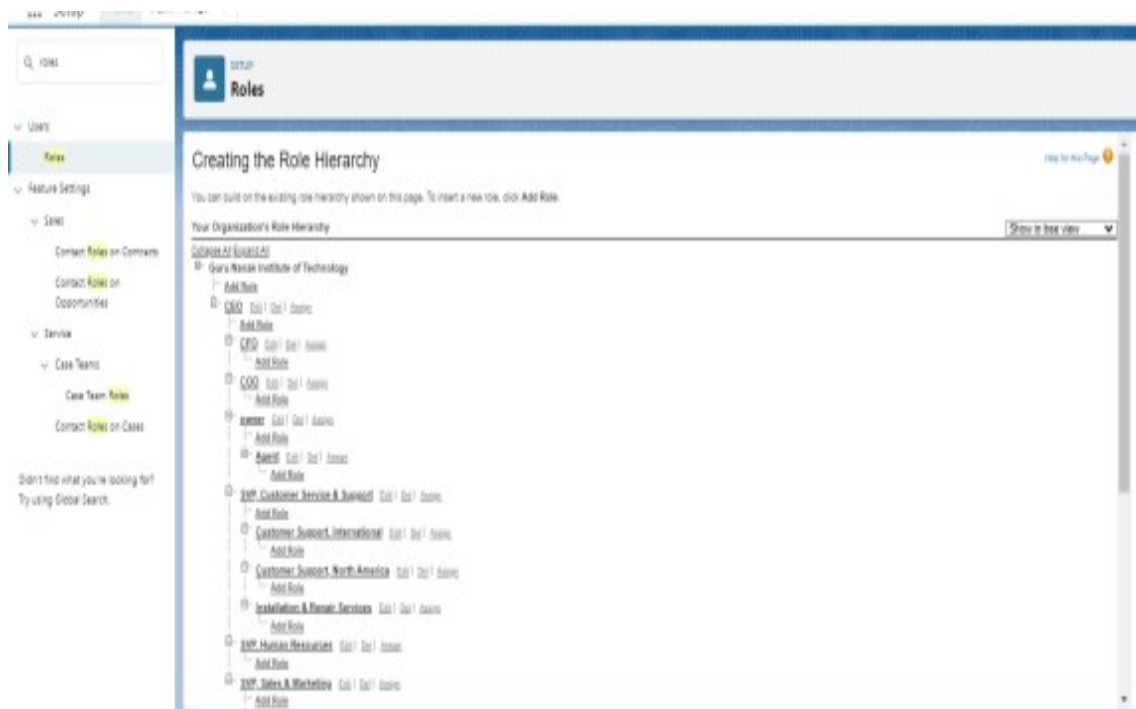
### 2. Custom Roles:

Organizations can create custom roles tailored to their specific needs. Unlike standard roles, custom roles can be deleted if there are no users assigned to them.

By establishing a clear role hierarchy, Salesforce ensures that users at higher levels have greater access to data than those at lower levels, facilitating effective data management and security within the organization.

## Task 18: 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



## Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

### Your Organization's Role Hierarchy

Show in tree view 

Colloidal AI Liquid AI

<sup>10</sup> Guru Nanak Institute of Technology

Add More

④ CSO 2001 2001 2001 2001

100

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1

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1

**EXERCISE** Call | Call | Answer

1

10-2025 Release under E.O. 14176

200 Customer Service & Support List Edit Add

1

| Customer Support International | Call | Site | Access |
|--------------------------------|------|------|--------|
|--------------------------------|------|------|--------|

Customer Support: North America 1-800-354-7701

89- Installation & Plenum Services Ltd / Ltd / Limited

IMP: Human Resources Jan | Feb | March

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10

**Role Edit**

Label:

Role Name:

This role reports to:

Role Name as displayed on reports:

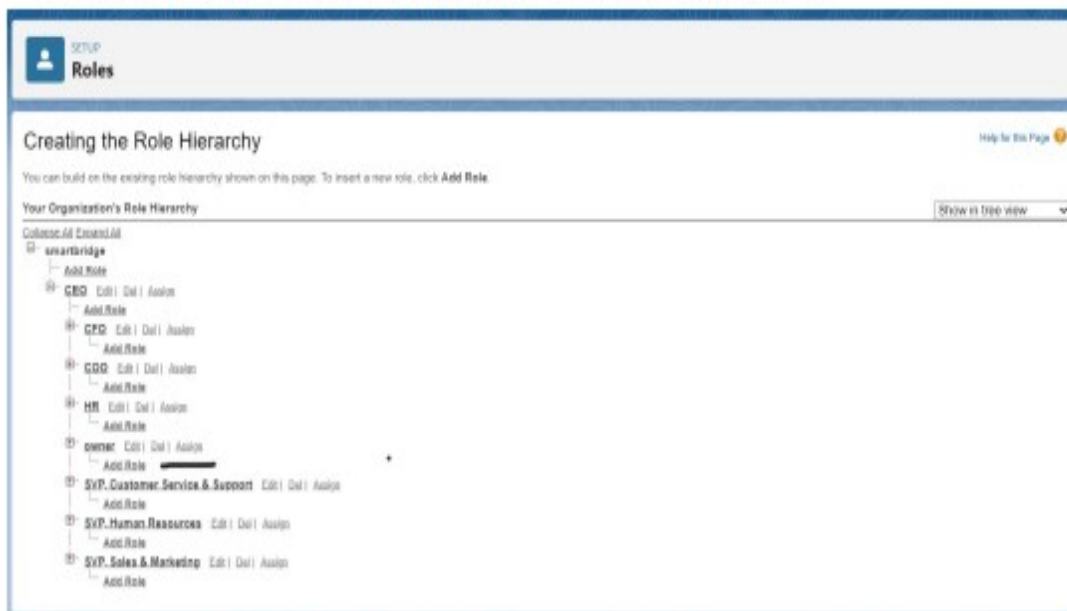
[Save](#) [Save & New](#) [Cancel](#)

4. Click and save it.

## Task 19: 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

In the context of Salesforce, a user refers to any individual who logs in to the platform. These users are typically employees within your organization, such as sales representatives, managers, and IT specialists, who require access to the company's records stored in Salesforce. Each user has a unique user account that serves to identify them and defines the specific features and records they can access based on their assigned settings.

The user account is a crucial element in Salesforce, as it ensures that users are properly identified and granted the appropriate level of access to perform their job functions effectively. The account settings, which include factors like user licenses, profiles, and roles, determine the extent of a user's capabilities within the platform. This level of control ensures that sensitive data remains secure while enabling users to efficiently utilize Salesforce to meet their business objectives.

By establishing user accounts and defining their associated settings, Salesforce administrators can effectively manage user access, maintain data integrity, and align user permissions with the organization's overall structure and requirements. This user management approach is essential for ensuring the smooth operation and optimal utilization of Salesforce within the company.

## Task 20: Create User

### Activity 1: Create user 1

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 Salesforce 'User Edit' page for a user named 'vicky y'. The page is divided into two main sections: 'General Information' and 'Permissions'. The 'General Information' section includes fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. The 'Permissions' section includes fields for Role, User License, Profile, and Active status, along with checkboxes for various user types like Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, etc. The 'User License' is set to 'Salesforce' and the 'Profile' is set to '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 : User name should be in this form:[text@text.text](#)
8. Nick Name : Give a Nickname
9. Role : Agent
10. User license : Salesforce platform

## 11.11.Profiles : standard platform user.

The screenshot displays the Salesforce 'User Edit' page for a user named 'ram ram'. The left sidebar shows the navigation menu with 'Users' selected. The main content area is titled 'User Edit' and contains the following fields:

- First Name:** ram
- Last Name:** ram
- Alias:** ram
- Email:** 21031a6436@pindia.org
- Username:** ram@pindia.org
- Encrypted Email:** ram123@pindia.org
- Title:**
- Company:**
- Department:**
- Division:**
- Role:** Agent
- User License:** Salesforce Platform
- Profile:** Standard Platform User
- 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:** -None-
- Data.com Working Address Card:** ☐
- Accessibility Mode (Classic Org):** ☐
- High-Contrast Palette on Charts:** ☐
- Load Lightning Pages from Bundling:** ☒
- Debug Mode:** ☐

## 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 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:

1. **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.
2. **Auto launched 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.
3. **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.

4. **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.
5. **Scheduled Flows:** These are flows that you can schedule to run at specific times or intervals. They are often used for automating recurring tasks.
6. **Flow Elements:** Flow Builder offers various elements that you can use to create flows, such as variables, decisions, loops, and more. These elements allow you to build sophisticated logic into your flows.
7. **Subflows:** Subflows are reusable flow elements that you can incorporate into multiple flows, making it easier to manage and maintain complex processes.
8. **Record-Triggered Flows:** These are flows that are triggered when records meet specified criteria. They are often used for automating record updates and related actions.

Why do we need to create a flow:

In summary, creating a flow in Salesforce is crucial for automating tasks, streamlining processes, and enhancing user experiences. It empowers organizations to operate more efficiently while maintaining high standards of data quality and operational consistency.

**Select Object**

Select the object whose records trigger the flow when they're created, updated, or deleted.

\* Object

Laptop Bookings

**Configure Trigger**

\* Trigger the Flow When:

☐ A record is created

☐ A record is updated

☒ A record is created or updated

☐ A record is deleted

**Set Entry Conditions**

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Cancel Done

**Configure Start**

**Set Entry Conditions**

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements

None

\* Optimize the Flow for:

**Fast Field Updates**

Update fields on the record that triggers the flow to run. This high-performance flow runs before the record is saved to the database.

**Actions and Related Records**

Update any record and perform actions, like send an email. This more flexible flow runs after the record is saved to the database.

☐ Include a Run Asynchronously path to access an external system after the original transaction for the triggering record is successfully committed

Cancel Done

8. Enter the Outcome Details Label: dell , Outcome API name: Gets Automatically Generated. ● Resource: Select Record.Laptop booking\_c. ● Operator: SelectEquals. ● Value: Select dell ● Add the same outcome orderto acer , hp,mac. Click done



**Edit Decision**

\*Label: field should updated      \*API Name: field\_should\_updated

Description: the field should be automatically updated

**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.

**OUTCOME ORDER** +

- dell
- acer
- hp
- mac
- false

**OUTCOME DETAILS** [Delete Outcome]

\*Label: dell      \*Outcome API Name: dell

Condition Requirements to Execute Outcome: All Conditions Are Met (AND)

| Resource                  | Operator | Value |
|---------------------------|----------|-------|
| \$Record > Laptop names X | equals   | Dell  |

Cancel Done

9. Go to flow page

10. Check the flow chart.

11. Beside dell there is a symbol '+' click on that.

12. Again select decision

13. Enter the Details Label: Field should Update (any one you want), API name: Gets

Automatically Generated.

14. Select the Outcome Details Label: dell core i3, Outcome API name: Gets Automatically Generated.

- Resource: Select Record.core type.
- 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
  - 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.

Edit Decision

\* Label: field updated      \* API Name: field\_updated

Description:

**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.

| OUTCOME ORDER | OUTCOME DETAILS   |
|---------------|---|
| 1             | <p>dell core i3</p> <p>* Label: dell core i3      * Outcome API Name: dellcore_i3</p> <p>Condition Requirements to Execute Outcome: All Conditions Are Met (AND)</p> <p>Resource: \$Record &gt; core type X      Operator: Equals      Value: core i3</p> |

Delete Outcome

Cancel 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.

21. 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..

22. Click '+' outcome details

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

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

24. Click '+' outcome details

25. 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..

26. Click '+' outcome details

27. 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 4.

\*Label: months selected      \*API Name: months\_selected

Description:

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.

| OUTCOME ORDER | OUTCOME DETAILS   |
|---------------|---|
| 1             | <p>*Label: 1      *Outcome API Name: X1</p> <p>Condition Requirements to Execute Outcome: All Conditions Are Met (AND)</p> <p>Resource: \$Record &gt; how many months      Operator: Equals      Value: 1</p> |
| 2             |   |
| 3             |   |
| 4             |   |
| 5             |   |

Buttons: Delete Outcome, Cancel, Done

28. Follow the above picture you will understand.

29. After dell 1(i3) there is '+' symbol like dell2(i3), dell3(i3), dell4(i3), dell5(i3).

30. Click on '+' then select update records

31. Enter the Details Label: one month of dell i3 rate

32. API name: Gets Automatically Generated.

33. Field:- Amount\_c

34. value:- for dell 1(i3)-1000, dell 2(i3)-2000, dell 3(i3)-3000, dell 4(i3)-4000, dell 5(i3)-5000.

35. Follow all these finally.

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: Select5.

Edit Decision

\*Label: months selected      \*API Name: months\_selected

Description:

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.

| OUTCOME ORDER | OUTCOME DETAILS   |
|---------------|---|
| 1             | *Label: 1      *Outcome API Name: X1<br>Condition Requirements to Execute Outcome: All Conditions Are Met (AND)<br>Resource: Record > how many months X      Operator: Equals      Value: 1 |
| 2             |   |
| 3             |   |
| 4             |   |
| 5             |   |

Delete Outcome      Cancel      Done

47. Follow the above picture you will understand.

48. After dell 1(i7) there is '+' symbol like dell 2(i7),dell 3(i7),dell 4(i7),dell 5(i7).

49. Click on '+' then select update records

50. Enter the Details Label: one month of dell i5 rate , API name: Gets Automatically Generated.

51. 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

52. Click done.

#### Task 22: Creating Flow On Acer Laptop

1. Go to flow page
2. Beside acer there is a symbol '+' click on that.
3. Again select decision
4. Enter the Details Label: Field is Update, API name: Gets Automatically Generated.
5. select the Outcome Details Label: acer core i3 , OutcomeAPI name: Gets Automatically Generated.
  - Resource: Select Record.core type.
  - Operator: Select Equals.

- Value: Select core i3.

6. Go to flow page
7. Beside dell thereis a symbol '+' clickon that.
8. Again select decision
9. Enter the Details Label: months selected , API name: Gets Automatically Generated.
10. Enter the OutcomeDetails Label: acer 1(i3) , Outcome API name: Gets Automatically Generated.
11.
  - Resource: Select Record.how many months.
  - Operator: Select Equals.
  - Value: 1.
12. Enter the OutcomeDetails Label: acer 2(i3) , Outcome API name: Gets Automatically Generated.
  - Resource: Select Record.how many months.
  - Operator: Select Equals.
  - Value: Select 2..

13. Click '+' outcome details

14. Enter the Outcome Details Label: acer 3(i3) , Outcome API name: GetsAutomatically Generated.

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

15. Click '+' outcome details

16. Enter the Outcome Details Label: acer 4(i3) , Outcome API name: Gets Automatically Generated.

- Resource: Select Record.how many months.
- Operator: Select Equals.
- Value: Select4.

17. Click '+' outcome details

18. Enter the Outcome Details Label: acer 5(i3) , Outcome API name: Gets Automatically Generated.

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

The screenshot shows the 'Edit Decision' form. At the top, there are fields for '\* Label' (acer months selected) and '\* API Name' (acer\_months\_selected). Below these is a 'Description' field. The 'Outcomes' section has a header with a '+' icon and a 'Delete Outcome' button. It contains a table with columns for 'OUTCOME ORDER', 'OUTCOME DETAILS', and 'Delete Outcome'. The table has five rows, each representing an outcome. The first four rows are for 'acer 1(i3)', 'acer 2(i3)', 'acer 3(i3)', and 'acer 4(i3)'. The fifth row is for 'acer 5(i3)' and is currently selected. The 'OUTCOME DETAILS' for 'acer 5(i3)' show '\* Label' (acer 1(i3)), '\* Outcome API Name' (acer\_1\_i3), 'Condition Requirements to Execute Outcome' (All Conditions Are Met (AND)), 'Resource' (\$Record > how many months), 'Operator' (Equals), and 'Value' (1). At the bottom right, there are 'Cancel' and 'Done' buttons.

| OUTCOME ORDER | OUTCOME DETAILS | Delete Outcome |
|---------------|-----------------|----------------|
| 1             | acer 1(i3)      |                |
| 2             | acer 2(i3)      |                |
| 3             | acer 3(i3)      |                |
| 4             | acer 4(i3)      |                |
| 5             | acer 5(i3)      |                |

Click done.



19. After acer 1(i3)there is '+' symbol like acer 2(i3),acer 3(i3),acer 4(i3),acer 5(i3).
20. Click on '+' then select update records
21. Enter the Details Label: one month of acer i3 rate , API name: Gets Automatically Generated.
22. Field:- Amount\_c , value:- for acer 1(i3)-900, acer 2(i3)-1800, acer 3(i3)-2700,acer 4(i3)-3600, acer 5(i3)-4800. Follow for all these finally

The screenshot shows a configuration window for a flow. The title bar reads "one month of acer i3 rate (one\_month\_of\_acer\_i3\_rate)".

**\* How to Find Records to Update and Set Their Values**

- ☒ Use the laptop bookings record that triggered the flow
- ☐ Update records related to the laptop bookings record that triggered the flow
- ☐ Use the IDs and all field values from a record or record collection
- ☐ Specify conditions to identify records, and set fields individually

**Set Filter Conditions**

Condition Requirements to Update Record

None—Always Update Record

**Set Field Values for the Laptop Bookings Record**

| Field    | Value |
|----------|-------|
| Amount_c | 900   |

+ Add Field

Cancel Done

## Task 23: Creating A Flow On Hp Laptop

1. Go to flow page
2. Beside hp there is a symbol '+' click on that.
3. Again select decision
4. Enter the Details Label: Field is Update, API name: Gets

Automatically Generated.

5. select the Outcome Details Label: hp core i5 , Outcome API name: Gets Automatically Generated.
  - Resource: Select Record.core type.
  - Operator: Select Equals.
  - Value: Select hp i5.
6. Go to flow page
7. Beside hp there is a symbol '+' click on that.
8. Again select decision
9. Enter the Details Label: hp field should be updated , API name: Gets Automatically Generated.
10. Enter the Outcome Details Label: hp 1(i5) , Outcome API name: Gets Automatically Generated.
11. Here,
  - Resource: Select Record.how many months.
  - Operator: Select Equals.
  - Value: 1.
12. Enter the Outcome Details Label: hp 2(i5) , Outcome API name: Gets Automatically Generated.
  - Resource: Select Record.how many months.
  - Operator: Select Equals.
  - Value: Select 2..
13. Click '+' outcome details
14. Enter the Outcome Details Label: hp 3(i5) , Outcome API name: Gets Automatically Generated.
  - Resource: Select Record.how many months.
  - Operator: Select Equals.
  - Value: Select 3..
15. Click '+' outcome details

16. Enter the Outcome Details Label: hp 4(i5) , Outcome API name: Gets Automatically Generated.

- Resource: Select Record.how many months.

- Operator: Select Equals.

- Value: Select 4.

17. Click '+' outcome details

18. Enter the Outcome Details Label: hp 5(i5) , Outcome API name: Gets Automatically Generated.

- Resource: Select Record.how many months.

- Operator: Select Equals.

- Value: Select 5.

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.

OUTCOME ORDER +

- hp core i2
- hp core i5
- hp core i7
- Default Outcome

OUTCOME DETAILS

\*Label hp core i5 \*Outcome API Name hp\_core\_i5

Condition Requirements to Execute Outcome All Conditions Are Met (AND)

Resource Operator Value

Record > core type X Equals core i5

+ Add Condition

When to Execute Outcome

☒ If the condition requirements are met

☐ Only if the record that triggered the flow to run is updated to meet the condition requirements

Cancel Done

Click on done.

19. After hp 1(i5) there is '+' symbol like hp 2(i5), hp 3(i5), hp 4(i5),hp5(i5).

20. Click on '+' then select update records

21. Enter the Details Label:one month of hp i5 rate , API name:Gets Automatically Generated.

22.Field:- Amount\_c, value:- for hp 1(i5)-1700, hp 2(i5)-3400, hp 3(i5)-5100, hp 4(i5)-6800, hp 5(i5)-8500. Follow for all these finally

The screenshot shows a configuration window for a flow. At the top, the title is "one month of hp i5 rate (one\_month\_of\_hp\_i5\_rate)". Below the title, there is a section titled "\*How to Find Records to Update and Set Their Values" with four radio button options: "Use the laptop bookings record that triggered the flow" (selected), "Update records related to the laptop bookings record that triggered the flow", "Use the IDs and all field values from a record or record collection", and "Specify conditions to identify records, and set fields individually". Below this is a section titled "Set Filter Conditions" with a dropdown menu labeled "Condition Requirements to Update Record" set to "None—Always Update Record". The next section is "Set Field Values for the Laptop Bookings Record", which contains a table with two columns: "Field" and "Value". The first row shows "Amount\_c" in the Field column and "1700" in the Value column. There is a "+ Add Field" button below the table. At the bottom right, there are "Cancel" and "Done" buttons.

## Task 24: Creating A Flow On Mac Laptop

1. Go to flow page
2. Beside mac there is a symbol '+' click on that.
3. Again select decision
4. Enter the DetailsLabel: mac should be Updated, API name: Gets Automatically Generated.
5. select the OutcomeDetails Label: mac laptop , Outcome API name: GetsAutomatically Generated.
  - Resource: Select Record.core type.
  - Operator: Select Equals.

- Value: Select Bionic Chip.

**EDIT DECISION**

\*Label: mac field should be updated

\*API Name: mac\_field\_should\_be\_updated

Description:

**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.

**OUTCOME ORDER** +

- mac laptop

**OUTCOME DETAILS**

\*Label: mac laptop

\*Outcome API Name: mac\_laptop

Condition Requirements to Execute Outcome: All Conditions Are Met (AND)

| Resource             | Operator | Value       |
|----------------------|----------|-------------|
| Record > core type X | Equals   | Bionic chip |

+ Add Condition

Cancel Done

Click done.

6. Go to flow page
7. Beside Mac there is a symbol '+' click on that.
8. Again select decision
9. Enter the Details Label:Mac months selected , API name: Gets Automatically Generated.
10. Enter the Outcome Details Label:mac bionic chip(1), Outcome APIname: Gets

Automatically

Generated.

11.

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

12. Enter the Outcome Details Label:mac bionic chip(1), Outcome API name: Gets Automatically Generated.

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

13. Click '+' outcomedetails

14. Enter the Outcome Details Label:mac bionic chip(1), Outcome API name: Gets Automatically Generated.

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

15. Click '+' outcome details

16. Enter the Outcome Details Label:mac bionic chip(1), Outcome API name: Gets Automatically Generated.

- Resource: Select Record.how many months.
- Operator: Select Equals.
- Value: Select4.

17. Click '+' outcome details

18. Enter the Outcome Details Label:mac bionic chip(1), Outcome API name: Gets Automatically Generated.

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

**mac months selected** (mac\_months\_selected)

**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.

| OUTCOME ORDER      | OUTCOME DETAILS  |
|--------------------|--|
| mac bionic chip(1) | <p>* Label: mac bionic chip(1) * Outcome API Name: mac_bionic_chip_1</p> <p>Condition Requirements to Execute Outcome: All Conditions Are Met (AND)</p> <p>Resource: \$Record &gt; how many months Operator: Equals Value: 1</p> <p>+ Add Condition</p> <p>When to Execute Outcome: <input checked="" type="radio"/> If the condition requirements are met <input type="radio"/> Only if the record that triggered the flow to run is updated to meet the condition requirements</p> |
| mac bionic chip(2) |  |
| mac bionic chip(3) |  |
| mac bionic chip(4) |  |
| mac bionic chip(5) |  |
| Default Outcome    |  |

Cancel Done

Click done.

19. After mac bionic chip(1) there is '+' symbol like mac bionicchip(2), mac bionic chip(3),

mac bionic chip(4),mac bionic chip(5).

20. Click on '+' then select  
updaterecords

21. Enter the Details Label: one month of mac rate , API name: Gets Automatically Generated.

22. Field:- Amount\_c , value:- for one month of mac bionic chip rate-1700,two month

of mac bionic chip rate-3400, three month of mac bionic chip rate-5100,four

month of mac bionic chip rate-6800, five month of mac bionic chip rate-8500.

Follow for all these finally

\* How to Find Records to Update and Set Their Values

- ☒ Use the laptop bookings record that triggered the flow
- ☐ Update records related to the laptop bookings record that triggered the flow
- ☐ Use the IDs and all field values from a record or record collection
- ☐ Specify conditions to identify records, and set fields individually

Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record ▼

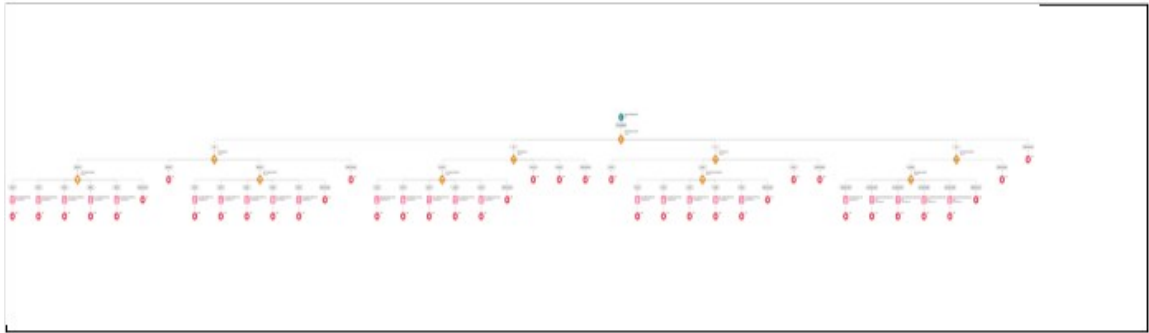
Set Field Values for the Laptop Bookings Record

| Field    | Value |
|----------|-------|
| Amount_c | 2000  |

Cancel Done

23. Click done.

## FLOW:



- Click on save .
- Label:- Laptop distributions, api name:- automatically filled
- Save the flow and activate it.

## APEX

Apex is a powerful, object-oriented programming language that allows developers to execute flow and transaction control statements on the Salesforce platform server, in conjunction with calls to the Salesforce API. Apex code resembles Java syntax and functions similar to database stored procedures, enabling developers to add business logic to various system events, such as button clicks, related record updates, and Visualforce pages. Additionally, Apex code can be initiated by web service requests and from triggers on objects.

Apex shares many similarities with Java, including support for object-oriented programming (OOP) concepts like classes, objects, and methods.

### Creating Classes in Apex

Apex classes are modeled after their counter parts in Java. Developers can



define, instantiate, and

extend classes, as well as work with interfaces, Apex class versions, properties, and other related class

concepts.

ts.

## Class

Similar to Java, Apex allows the creation of classes. A class serves as a template or blue print from which objects are created. An object is an

instance of a class. Object An object is an instance of a class in Apex.

When an object is created, it can access all the properties present in the class, including variables and methods.

By leveraging Apex's object-oriented programming capabilities, developers can create modular, reusable code that enhances the functionality and flexibility of Salesforce applications. The language's syntax and behavior, which closely resemble Java, make it easier for developers familiar with Java to transition to Apex development. Access specifiers in Apex

Apex allows you to use the private, protected, public, and global access modifiers when defining methods and variables.

While triggers and anonymous blocks can also use these access modifiers, they aren't as useful in smaller portions of Apex. For example, declaring a method as global in an anonymous block doesn't enable you to call it from outside of that code. Private:

This access modifier is the default, and means that the method or variable is accessible only within the Apex class in which it's defined.

If you don't specify an access modifier, the method or variable is private.

### Protected:

This means that the method or variable is visible to any inner classes in the defining Apex class, and to the classes that extend the defining Apex class.

You can only use this access modifier for instance methods and member variables. This setting is strictly more permissive than the default (private)

setting, just like Java.Public :

This means that the method or variable is accessible by all Apex within a specific package.

For accessibility by all second-generation (2GP) managed packages that share a

namespace, use public with the @NamespaceAccessible annotation.

Using the public

access modifier in no-namespace package simply renders the Apex code as @NamespaceAccessible.Global:

This means the method or variable can be used by any Apex code that has access to the class, not just the Apex code in the same application. This access modifier must be used for any method that must be referenced outside of the application, either in SOAP API or by other Apex code. If you declare a method or variable as global, you must also declare the class that contains it as global. This is how a new class is created :

Triggers

A trigger is a set of Apex code that runs before or after DML(Data Manipulation Language) events.

A DML event could be a variety of data processing tasks that include the standard insert, update, and delete commands.

With Apex triggers, you can automate tasks that would otherwise be nearly impossible to accomplish using only the Salesforce user interface. Triggers enable you to create custom scripts that you can implement according to your needs, and the only limitation is your coding skills.

There are two Salesforce Apex trigger types:

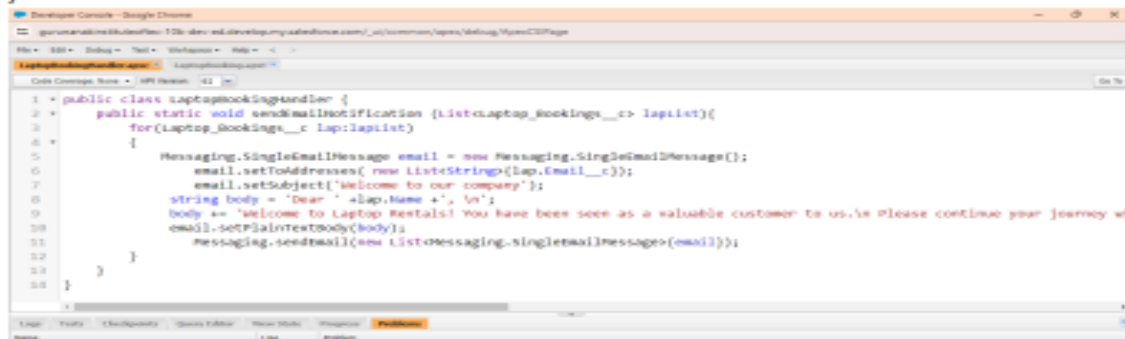
1. Before triggers. These are helpful in cases that require a validation process before accepting a change. They run before any database changes.
2. After triggers. These are helpful in cases where you need to modify

your database records and when the necessary value is stored in other records. They run after any database changes. Both types will help you perform custom tasks and manage records effectively. They can help you perform bulk actions as they can handle several records simultaneously

The code snippet for the apex class is:

```
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_type__c + ' \n Laptop type = '+lap.laptop_names__c;  
            email.setPlainTextBody(body);  
            Messaging.sendEmail(new List<Messaging.SingleEmailMessage>{email});  
        }  
    }  
}
```



## Reports

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

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

1. Tabular 2. Summary 3. Matrix 4. Joined Reports

#### 1. TabularReports:

Simple listing of data without any subtotals. This type of reports provide you most basically to look at your data. Use tabular reports when you want a simple list or a list of items with a grandtotal.

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

#### 2. SummaryReports:

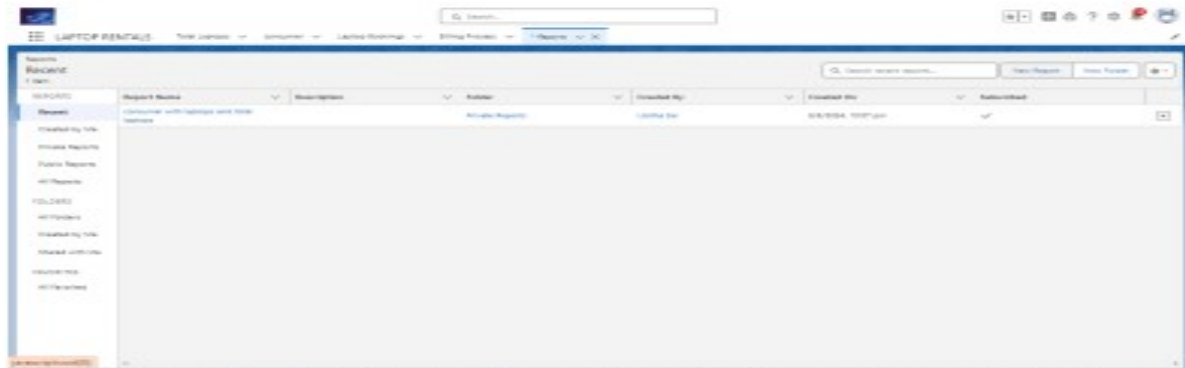
This type of reports provide a listing of data with groupings and sub totals. Use summary reports when you want subtotals based on the value of a particular field or when you want to create a hierarchically grouped report, such as sales organized by year and then by quarter. Example: All opportunities for your team sub totaled by Sales Stage and Owner.

#### 3. Matrix Reports:

This type of reports allow you to group records both by row and by column. A comparison of related totals, with totals by both row and column. Use matrix reports when you want to see data by two different dimensions that aren't related, such as date and product. Example: Summarize opportunities by month vertically and by account horizontally. 4. Joined Reports: Blocks of related information in a single report. This type of reports enable you to adopt five different blocks to display different types of related data. Each block can own unique columns, summary fields, formulas, filters and sort order. Use joined reports to group and show data from multiple report types in different views. Example: You can build a report to show opportunity, case and activity data for your accounts.

Task 27: Create Report

## 2. Click New Report.



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.



4. Customize your report

5. Add fields from left pane as shown below

THANK  
YOU