A CRM APPLICATION FOR LAPTOP RENTALS

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About Project:

Hardware Required:
laptops

System Required:
1)Windows 8 machine 2)Install with two web browser 3)Bandwidth of 30mbps

CRM Application on Laptop rentals is about delivering the items to the customers by rental purpose. It leverages the power of customer relationship management (CRM) to enhance customer experiences, optimize store operations, and improve overall efficiency. Additionally to these, we also need to do an effective CRM i.e via communicating through email with the potential customers identified.

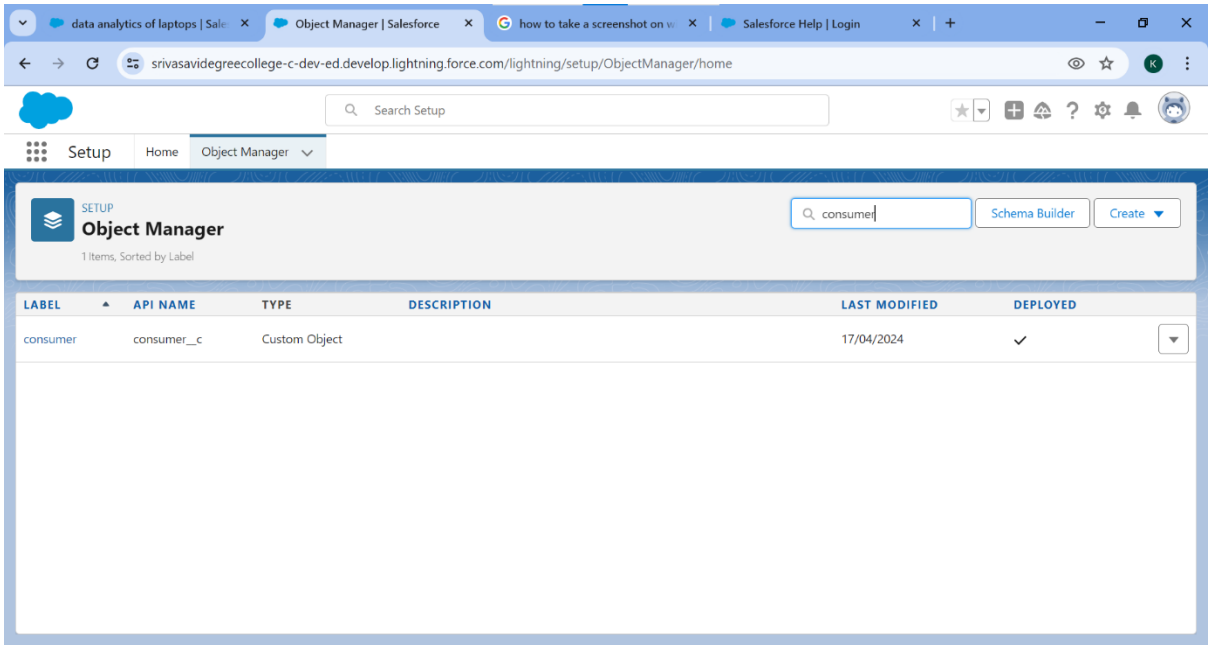
Object Creation:

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.



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

The Lightning App:

An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.
Lightning apps let you brand your apps with a custom color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your org can work more efficiently by easily switching between apps.

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Fields:

When we talk about Salesforce, Fields represent the data stored in the columns of a relational database. It can also hold any valuable information that you require for a specific object. Hence, the overall searching, deletion, and editing of the records become simpler and quicker.

Types of Fields

1. Standard Fields
2. Custom Fields

Standard Fields:

As the name suggests, the Standard Fields are the predefined fields in Salesforce that perform a standard task. The main point is that you can't simply delete a Standard Field until it is a non-required standard field. Otherwise, users have the option to delete them at any point from the application freely. Moreover, we have some fields that you will find common in every Salesforce application. They are,

? Created By

? Owner

? Last Modified

? Field Made During object Creation

Custom Fields:

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

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Validation Rule:

Validation rules are applied when a user tries to save a record and are used to check if the data meets specified criteria. If the criteria are not met, the validation rule triggers an error message and prevents the user from saving the record until the issues are resolved.

Improve the quality of your data using validation rules. Validation rules verify that the data a user enters in a record meets the standards you specify before the user can save the record. A validation rule can contain a formula or expression that evaluates the data in one or more fields and returns a value of “True” or “False”. Validation rules also include an error message to display to the user when the rule returns a value of “True” due to an invalid value.

Profiles:

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

Types of profiles in salesforce

1. Standard profiles:
   By default salesforce provides below standard profiles.
   - Contract Manager
   - Read Only
   - Marketing User
   - Solutions Manager
   - Standard User
   - System Administrator.

   We cannot deleted standard ones
   Each of these standard ones includes a default set of permissions for all of the standard objects available on the platform.

2. Custom Profiles:
   Custom ones defined by us.
   They can be deleted if there are no users assigned with that particular one.

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Roles And Herarchy:

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

Users:

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access.

Flows:

In Salesforce, a flow is a powerful tool that allows you to automate business processes, collect and update data, and guide users through a series of screens or steps. Flows are built using a visual interface and can be created without any coding knowledge.

In Salesforce, "flows" typically refer to Salesforce Flow, which is a powerful automation tool that allows you to create custom, automated processes in your Salesforce org without writing code. Salesforce Flow is a point-and-click tool that enables you to design and automate complex business processes, collect data, and interact with users in a visual interface. There are different types of flows in Salesforce, including:
Screen Flows: These are used to guide users through a series of screens to collect or display information. Screen Flows are often used for data entry and updates.

Autolaunched Flows: These are flows that are triggered by events, such as when a record is created or updated. They don't require user interaction and can be used for background automation.

Flow Builder: Flow Builder is the visual interface used to create flows. It allows you to design flows by adding elements, like screens, logic, and actions, using a drag-and-drop approach.

Flow Templates: Salesforce provides a library of pre-built flow templates that you can use as a starting point for your own flows. These templates cover a variety of use cases, from simple to complex.

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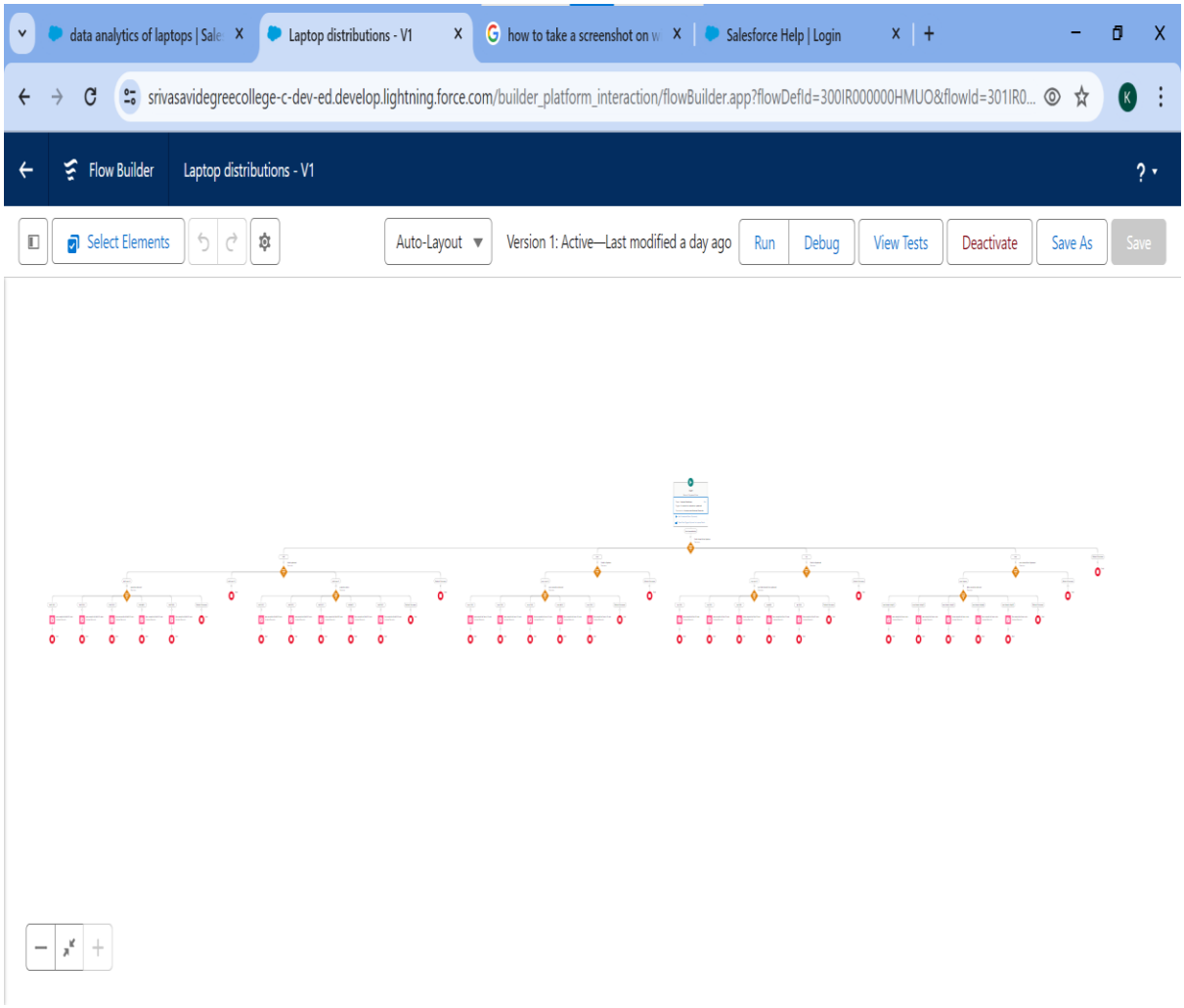
Scheduled Flows: These are flows that you can schedule to run at specific times or intervals. They are often used for automating recurring tasks.

Flow Elements: Flow Builder offers various elements that you can use to create flows, such as variables, decisions, loops, and more. These elements allow you to build sophisticated logic into your flows.



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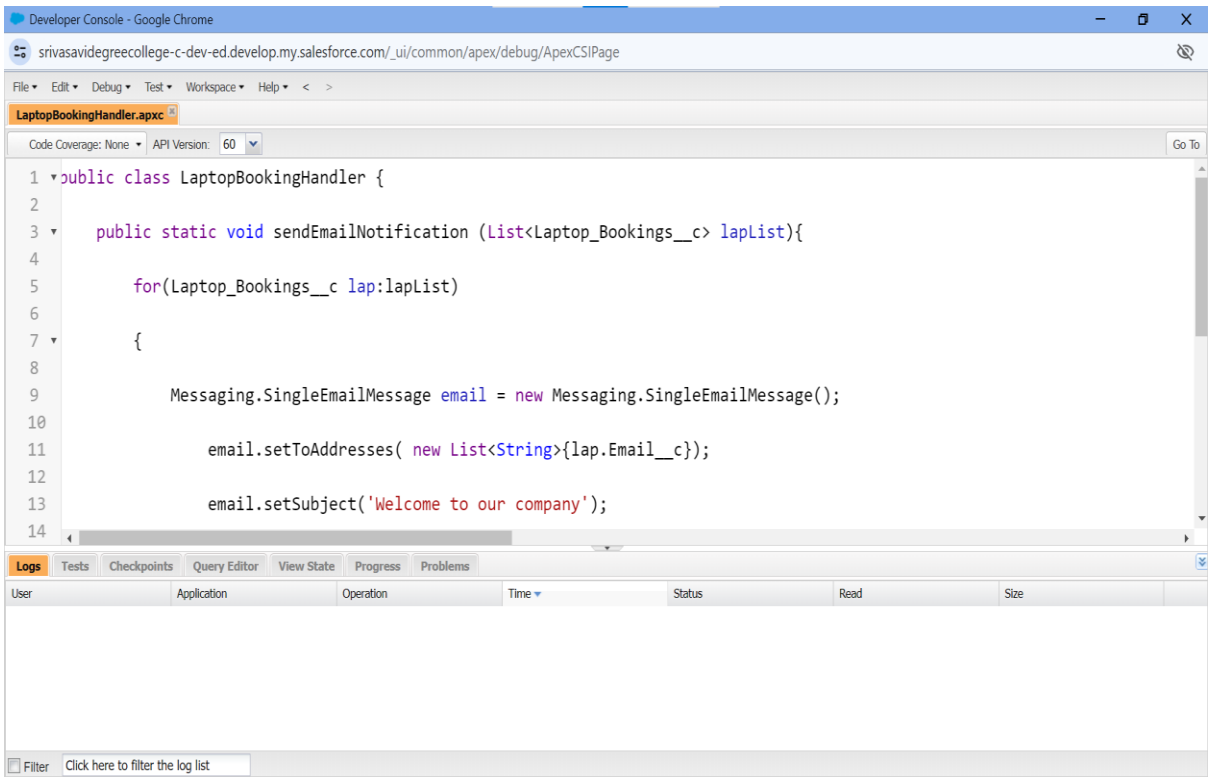
APEX:

Apex OverView

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

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

Apex class:



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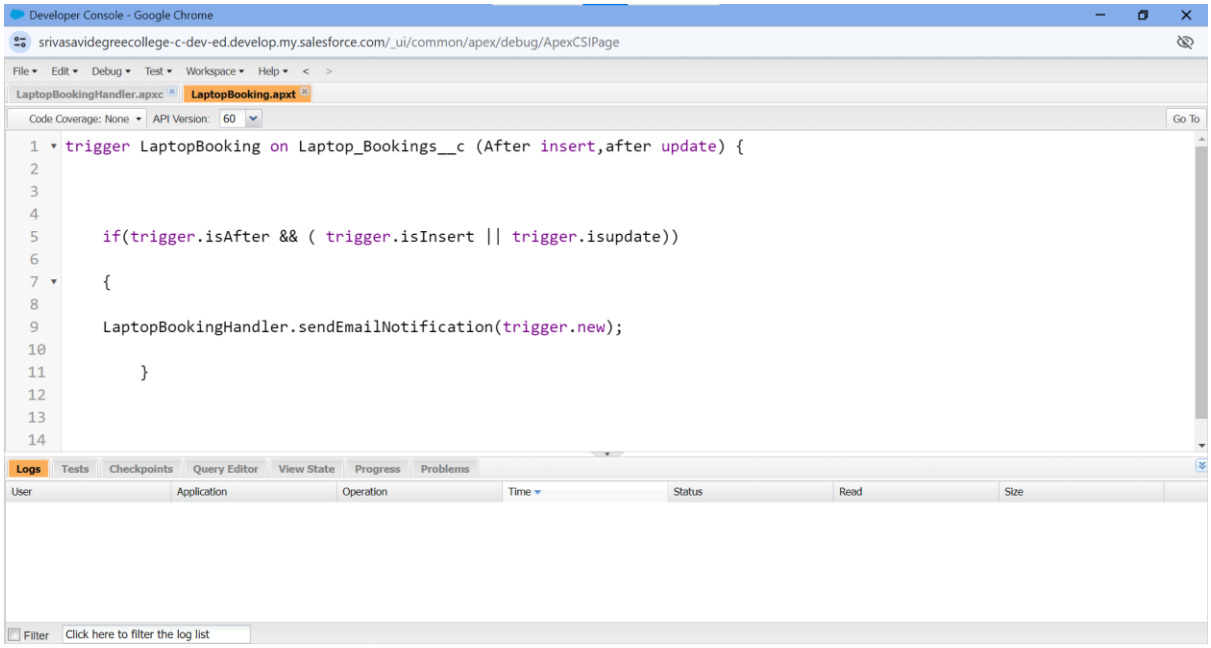

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Reports:

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. Tabula Reports: Simple listing of data without any subtotals. This type of reports provide you most basically to look at your data. Use tabular reports when you want a simple list or a list of items with a grand total.
Example: This type of reports are used to list all accounts, List of contacts, List of opportunities…..etc.….
2. Summary Reports: This type of reports provide a listing of data with groupings and sub totals. Use summary reports when you want subtotals based on the value of a particular field or when you want to create a hierarchically grouped report, such as sales organized by year and then by quarter.
Example: All opportunities for your team sub totaled by Sales Stage and Owner.
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.

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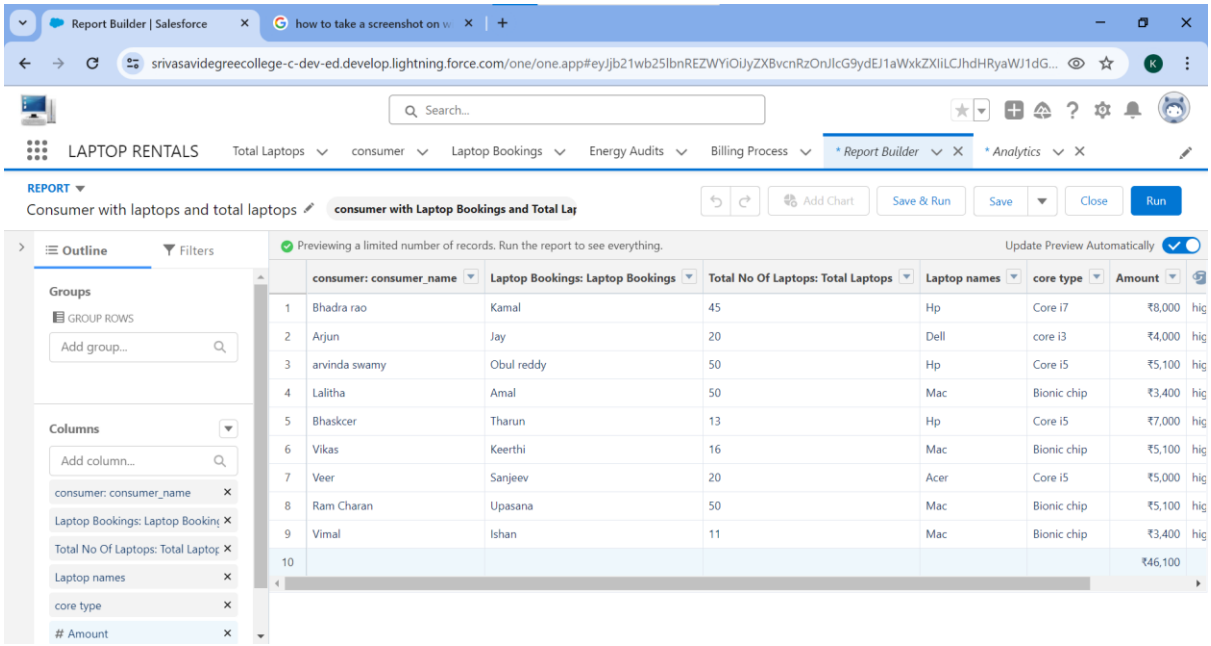
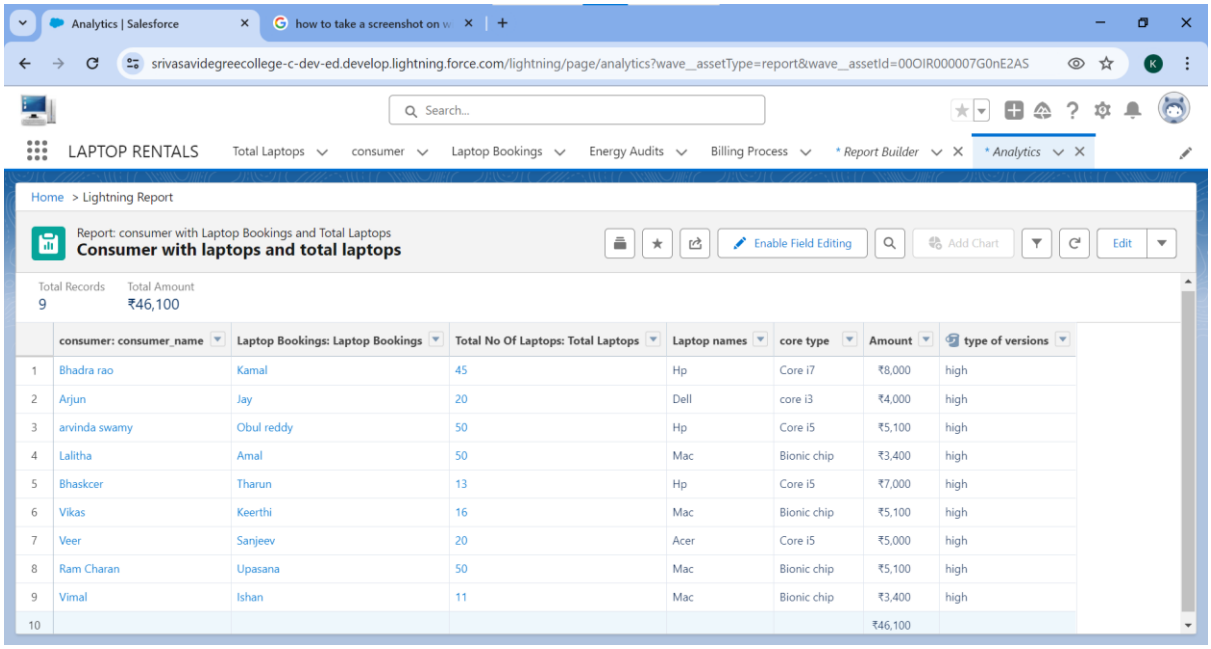
Reports:



Analytics:



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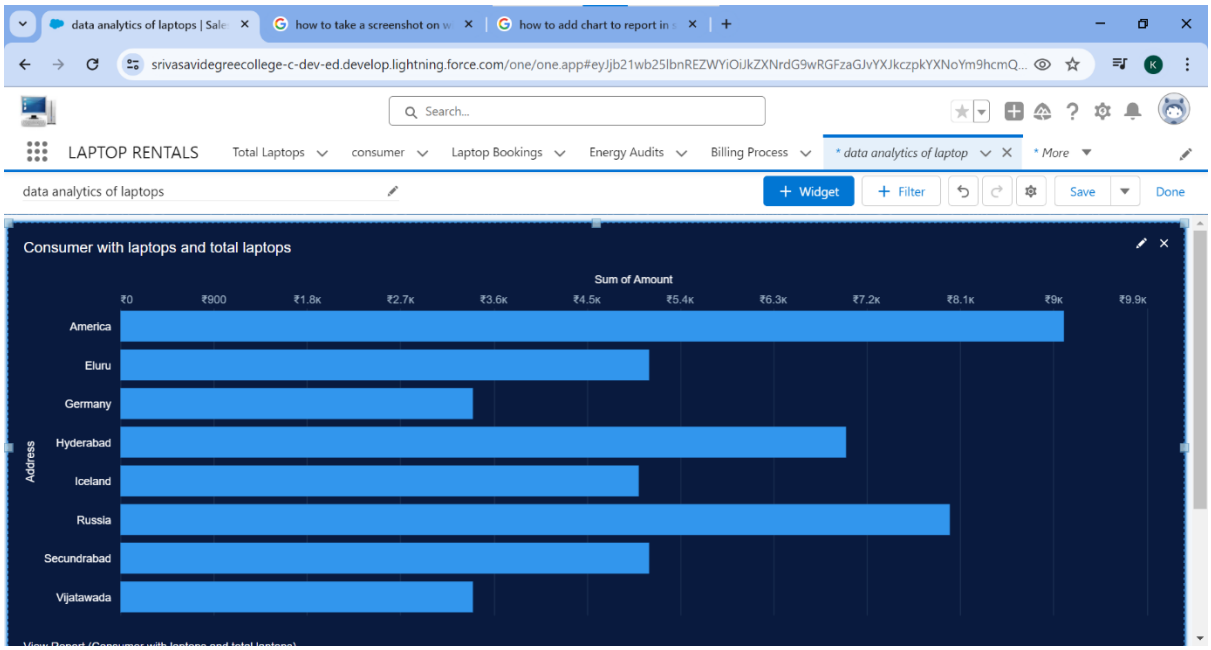
Dashboards :

Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities. Before building, reading, and sharing dashboards, review these dashboard basics.



Video Demo :

https://drive.google.com/file/d/1b6LrAy4cASuB2hfDwFrMwPlU_dA4LXDI/view?usp=sharing