

Sales Force Virtual Internship

Smart InternZ

A CRM APPLICATION FOR LAPTOP RENTALS

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Project Overview

The CRM Application for Laptop Rentals redefines the rental business landscape by leveraging Salesforce's powerful tools to create a seamless, customer-centric, and highly efficient platform. It caters specifically to the needs of the laptop rental industry, offering unparalleled operational control and customer engagement. The application's primary focus areas include:

- **Enhanced Customer Engagement:** It ensures smooth communication at every interaction point, making the rental experience more transparent and user-friendly.
- **Operational Excellence:** The platform tracks inventory and rental activities comprehensively, reducing manual intervention and errors.
- **Strategic Insights:** Advanced analytics empowers businesses with actionable data for smarter decision-making and strategic growth.

By integrating automated workflows, robust marketing tools, and data intelligence, this Salesforce-powered solution provides a unified and scalable platform that transcends traditional rental services.

Objectives

The project aims to achieve the following objectives:

1. **Deliver Superior Experiences:** Enhance customer satisfaction with transparent, efficient, and streamlined rental processes.
2. **Optimize Inventory Utilization:** Ensure optimal availability and utilization of laptops using intelligent inventory management.
3. **Boost Revenue Streams:** Implement targeted marketing campaigns to convert potential leads into loyal, repeat customers.
4. **Seamlessly Manage Relationships:** Centralize customer data to foster long-term and meaningful relationships.
5. **Achieve Operational Agility:** Enable the system to adapt swiftly to

changing market needs and customer demands through technological integration.

Business Goals:

- To optimize laptop rental operations by streamlining the entire rental process from booking to return.
 - To increase revenue and profitability through effective inventory management.
 - To build customer relationships by collecting valuable customer data and providing personalized service.
- Specific Outcomes:
- **Real-Time Tracking:** Implement a dashboard to monitor laptop availability, rental bookings, customer interactions, and revenue generation.
 - **Automation of Processes:** Streamline rental bookings and inventory management using Salesforce Flows and Triggers.
 - **User-Friendly Interface:** Develop tabs for easy customer onboarding, rental requests, and staff access to relevant information

Key Features and Concepts Utilized

1. Sales Cloud:

- **Customer Profiling:** Maintain detailed records of customers and their rental histories.
- **Opportunity Tracking:** Monitor and manage potential leads to drive conversions effectively.

2. Marketing Cloud:

- **Personalized Campaigns:** Deliver dynamic, customer-specific email campaigns to enhance engagement.
- **Automated Drip Campaigns:** Create workflows to nurture leads and encourage repeat business through consistent communication.

3. Service Cloud:

- **Integrated Case Management:** Provide real-time solutions to customer issues for improved satisfaction.
- **Chatbots:** Deploy Einstein AI-powered chatbots for 24/7

customer support.

4. Custom Features:

- **Rental Management Dashboard:** A centralized view of active and past rentals.
- **Inventory Analytics:** Predict laptop demand trends using historical rental data.
- **Automated Notifications:** Real-time alerts for overdue returns, promotions, or system updates.

Detailed Steps to the Solution

Summary:-

1. Requirement Analysis:

- Gather and understand customer needs and the requirements of the laptop rental business.
- Define functionalities such as inventory tracking, customer communication, and reporting mechanisms.

2. Salesforce Setup:

- Configure Salesforce's Sales and Marketing Cloud environments.
- Create custom objects for managing inventory (laptops), rentals, and customer data.

3. Application Development:

- Develop user-friendly interfaces for both administrators and customers.
- Set up workflows to handle rental requests, approvals, and returns.
- Design and implement email templates for notifications and marketing.

4. Integration:

- Connect Salesforce Marketing Cloud with external email services.

- Integrate payment processing and delivery tracking systems for a seamless experience.

5. Testing and Validation:

- Conduct rigorous testing to ensure each module performs as intended.
- Validate the accuracy of data, focusing on rentals, inventory, and customer records.

6. Deployment:

- Launch the application in a live production environment.
- Train store personnel and administrators on using the CRM platform effectively.

Detailed Explanation:-

1. Custom Objects Creation

Navigate to Object Manager:

1. Total Laptops Object:

- Label: `Total Laptops`, Plural: `Total Laptops`
- Record Name: `Total Laptops`, Data Type: `Text`
- Enable: `Allow Reports`, `Allow Search`, `Track Field History`
- Save.

SETUP > OBJECT MANAGER

Total Laptops

[Edit](#) [Delete](#)

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

Details

Description

API Name
Total_Laptops__c

Custom
✓

Singular Label
Total Laptops

Plural Label
Total Laptops

Enable Reports
✓

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
[Standard salesforce.com Help Window](#)

2. Consumer Object:

- **Label:** Consumer, **Plural:** Consumers
- **Record Name:** Consumer Name, **Data Type:** Name
- **Enable:** Allow Reports, Allow Search, Track Field History
- **Save.**

SETUP > OBJECT MANAGER

consumer

[Edit](#) [Delete](#)

Details

- Fields & Relationships
- Page Layouts
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- Search Layouts
- List View Button Layout

Details

Description

API Name
consumer__c

Custom
✓

Singular Label
consumer

Plural Label
consumer

Enable Reports
✓

Track Activities

Track Field History
✓

Deployment Status
Deployed

Help Settings
[Standard salesforce.com Help Window](#)

3. Laptop Bookings Object:

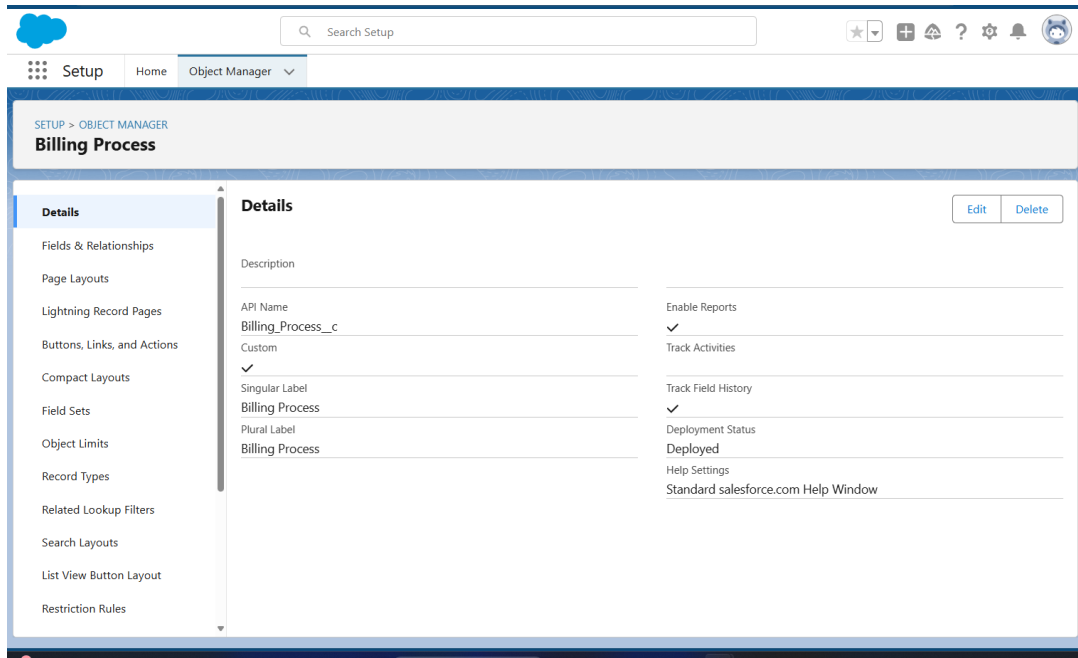
- **Label:** Laptop Bookings, **Plural:** Laptop Bookings

- **Record Name:** Laptop Bookings, **Data Type:** Name
- **Enable:** Allow Reports, Allow Search, Track Field History
- **Save.**

The screenshot shows the Salesforce Setup interface. At the top, there's a search bar labeled 'Search Setup'. Below it, the navigation menu includes 'Setup', 'Home', and 'Object Manager'. The 'Object Manager' section is expanded, showing 'Laptop Bookings' as the selected object. The main content area is titled 'Laptop Bookings' and contains a 'Details' section. On the left, a sidebar lists various configuration options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules. The 'Details' section on the right has two columns of settings. The first column includes 'Description', 'API Name' (Laptop_Bookings__c), 'Custom' (checked), 'Singular Label' (Laptop Bookings), 'Plural Label' (Laptop Bookings), and 'Record Types'. The second column includes 'Enable Reports' (checked), 'Track Activities', 'Track Field History' (checked), 'Deployment Status' (Deployed), 'Help Settings', and a link to 'Standard salesforce.com Help Window'. There are 'Edit' and 'Delete' buttons in the top right corner of the details section.

4. Billing Process Object:

- **Label:** Billing Process, **Plural:** Billing Processes
- **Record Name:** Billing Process Name, **Data Type:** Name
- **Enable:** Allow Reports, Allow Search, Track Field History
- **Save.**



2. Create Custom Tabs & Lightning Apps

1. Creating Custom Tabs:

- Navigate to **Setup** → **Tabs** → **New**.
- Select the object (e.g., Total Laptops, Laptop Bookings) and create tabs for them.
- Assign tabs to desired apps and profiles.

2. Create a Lightning App:

- Navigate to **Setup** → **App Manager** → **New Lightning App**.
- Add relevant tabs and objects to the app for streamlined navigation.

The image shows two screenshots from the Salesforce Setup interface.

Top Screenshot: Custom Tabs Configuration

The left sidebar shows the navigation menu with "Setup" selected. The main content area is titled "Custom Tabs" and includes a "Help for this Page" link. Below the title, there is a section for "Custom Object Tabs" with a table listing existing tabs:

Action	Label	Tab Style	Description
Edit Del	Billing Process	Flag	
Edit Del	consumer	Highway Sign	
Edit Del	Laptop Bookings	Laptop	
Edit Del	Total Laptops	Chalkboard	

Below the table, there are sections for "Web Tabs", "Visualforce Tabs", "Lightning Component Tabs", and "Lightning Page Tabs", each with a "New" button and a "What is This?" link. The "Web Tabs" section indicates "No Web Tabs have been defined".

Bottom Screenshot: App Settings for Lightning Instrumentation

The left sidebar shows "App Settings" selected. The main content area is titled "App Details & Branding" and includes a "Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar." section. Below this, there are two columns: "App Details" and "App Branding".

App Details:

- * App Name: LightningInstrumentation
- * Developer Name: LightningInstrumentation
- Description: View Adoption and Usage Metrics for Lightning Experience

App Branding:

- Image: Upload button
- Primary Color Hex Value: #0070D2
- Org Theme Options: ☐ Use the app's image and color instead of the org's custom theme

App Launcher Preview:

LightningInstrumentation
View Adoption and Usage Metrics for Lightning Experience

3. Creating Fields for Objects

Create Fields in Objects:

Navigate to **Object Manager** → **Select Object** → **Fields & Relationships** → **New Field** and configure the fields as needed.

1. Laptop Bookings Object:

- Create fields like Laptop Type, Booking Duration, and Rate.

2. Total Laptops Object:

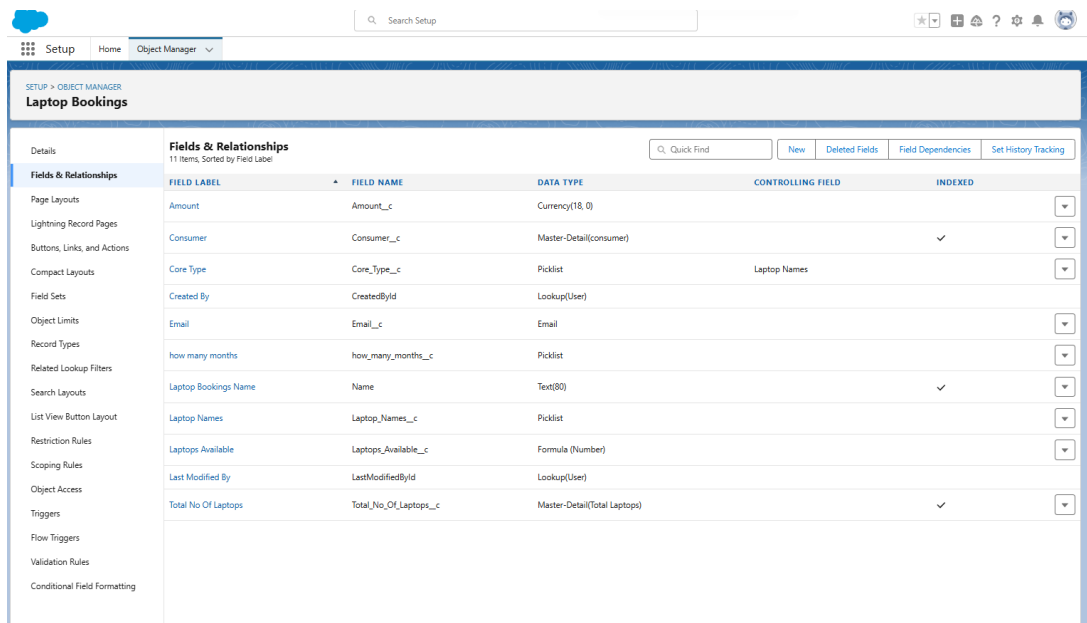
- Create fields like Brand, Core Type, and Quantity Available.

3. Billing Process Object:

- Create fields like Total Amount, Payment Status, and Invoice Number.

4. Consumers Object:

- Create fields like Phone Number, Email, and Address



The screenshot displays the Salesforce Setup interface, specifically the 'Object Manager' section for 'Laptop Bookings'. The 'Fields & Relationships' tab is active, showing a list of 11 fields. The interface includes a search bar at the top, a navigation menu on the left, and a table of fields with columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Currency(18, 0)		
Consumer	Consumer__c	Master-Detail(consumer)		✓
Core Type	Core_Type__c	Picklist	Laptop Names	
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
how many months	how_many_months__c	Picklist		
Laptop Bookings Name	Name	Text(80)		✓
Laptop Names	Laptop_Names__c	Picklist		
Laptops Available	Laptops_Available__c	Formula (Number)		
Last Modified By	LastModifiedById	Lookup(User)		
Total No Of Laptops	Total_No_Of_Laptops__c	Master-Detail(Total Laptops)		✓

Setup

Home

Object Manager

Search Setup

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SETUP > OBJECT MANAGER

Total Laptops

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

Object Access

Triggers

6 Items, Sorted by Field Label

Q Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Laptops Available	Laptops_Available__c	Formula (Number)		
Laptops delivered	Laptops_delivered__c	Roll-Up Summary (COUNT Laptop Bookings)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Total Laptops Name	Name	Text(80)		✓

Setup

Home

Object Manager

Search Setup

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SETUP > OBJECT MANAGER

Billing Process

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

7 Items, Sorted by Field Label

Q Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

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

Setup

Home

Object Manager

Search Setup

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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

Scoping Rules

Object Access

8 Items, Sorted by Field Label

Q Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Text Area(255)		
consumer Status	consumer_Status__c	Picklist		
consumer_name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone number	Phone_number__c	Phone		

4. Validation Rule

1. **Navigate to Consumer Object → Validation Rules → New.**

2. **Rule Details:**

- Name: Phonenumeroemailblankrule
- Description: Phone number and email must not be blank.
- Formula:
 - plaintext
 - Copy code
 - `OR (ISBLANK (phone_number__c), ISBLANK (email__c))`
- Save.

The screenshot displays the Salesforce Setup interface for the 'consumer' object. The left sidebar lists various setup categories, with 'Validation Rules' highlighted. The main content area shows the 'consumer Validation Rule' details. The rule is named 'Phonenumeroemailblankrule' and is active. The error condition formula is 'OR (ISBLANK (phone_number__c), ISBLANK (email__c))'. The error message is 'Please fill the phone number and email id'. The error location is 'Top of Page'. The rule was created by 'Evelina Madhuga' on 08/01/2025 at 7:52 pm and was last modified by the same user at the same time.

Validation Rule Detail		Active
Rule Name	Phonenumeroemailblankrule	✓
Error Condition Formula	OR (ISBLANK (phone_number__c), ISBLANK (email__c))	
Error Message	Please fill the phone number and email id	Error Location: Top of Page
Description	phone number and email number should not be blank	
Created By	Evelina Madhuga, 08/01/2025, 7:52 pm	Modified By: Evelina Madhuga, 08/01/2025, 7:52 pm

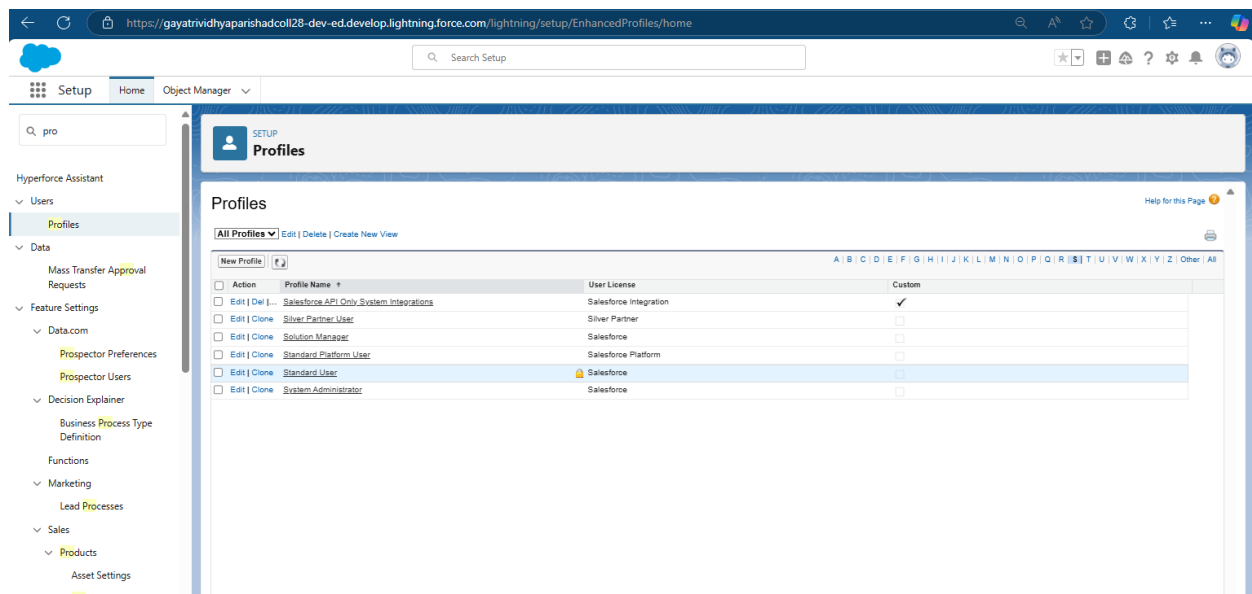
5. Profiles and Roles

1. Profiles:

- Clone Standard Profiles (e.g., Standard User) to create Owner and Agent profiles.
- Assign permissions for Total Laptops, Laptop Bookings, Consumers, and Billing Process.

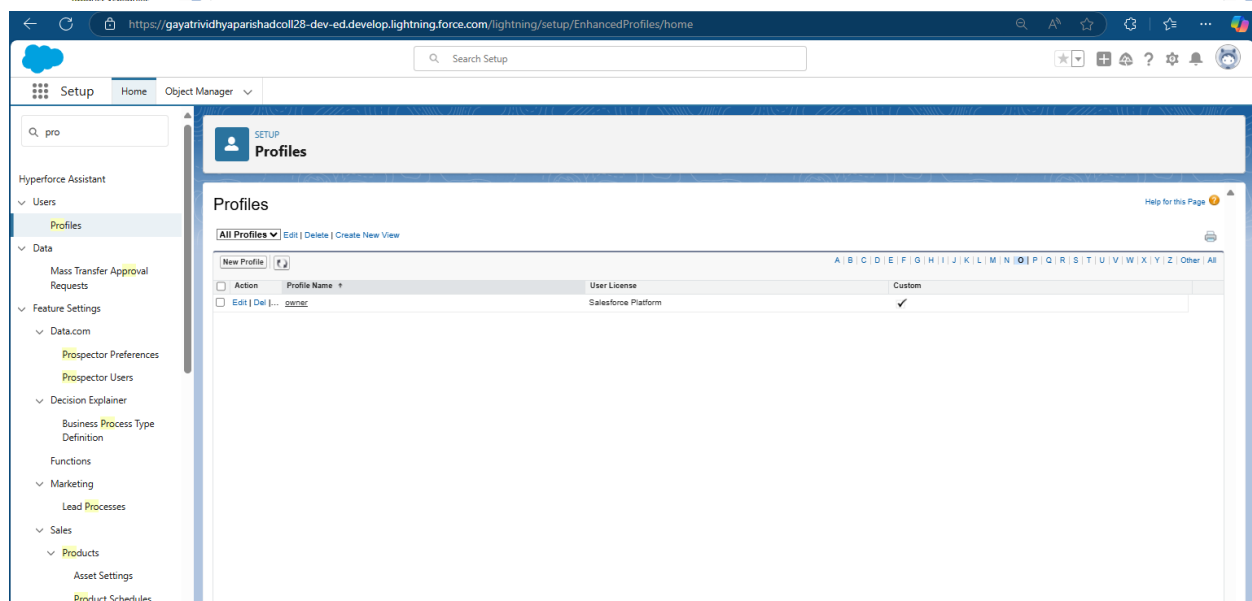
2. Roles:

- Create Owner and Agent roles with appropriate hierarchies.



The screenshot shows the Salesforce Setup interface for Profiles. The left sidebar contains a navigation menu with categories like Users, Data, Feature Settings, Data.com, and Prospectors. The main content area is titled 'Profiles' and includes a table of existing profiles. The table has columns for Action, Profile Name, User License, and a checkbox for Custom. The 'Standard User' profile is highlighted.

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit <input type="checkbox"/> Del <input type="checkbox"/> New	Salesforce API Only System Integrations	Salesforce Integration	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit <input type="checkbox"/> Clone	Silver Partner User	Silver Partner	<input type="checkbox"/>
<input type="checkbox"/> Edit <input type="checkbox"/> Clone	Solution Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit <input type="checkbox"/> Clone	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
<input type="checkbox"/> Edit <input type="checkbox"/> Clone	Standard User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit <input type="checkbox"/> Clone	System Administrator	Salesforce	<input type="checkbox"/>



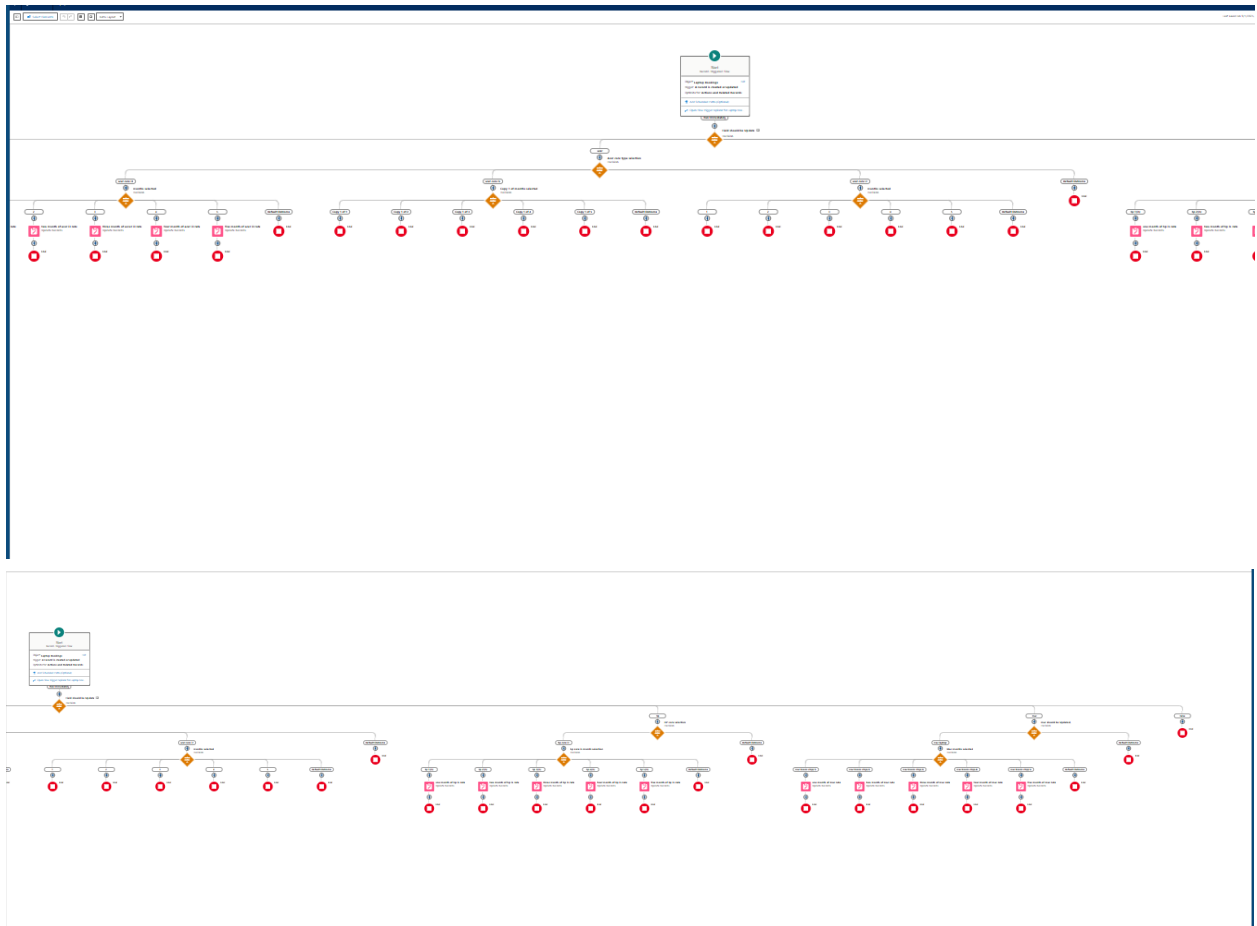
The screenshot shows the Salesforce Setup interface for Profiles, displaying a single profile. The left sidebar is the same as the previous screenshot. The main content area is titled 'Profiles' and shows a table with one profile.

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit <input type="checkbox"/> Del <input type="checkbox"/> New	partner	Salesforce Platform	<input checked="" type="checkbox"/>

7. Flow Creation

Create a flow named **Laptop Distributions**:

- Use decision elements to allocate rates based on Laptop Type and Booking Duration.
- Update records with calculated values.
- Save and activate the flow.



8. Triggers

Create a trigger for email notifications when a laptop booking is created or updated:

1. Trigger:

java

```

trigger LaptopBooking on Laptop_Bookings__c (after
insert, after update) {
    if (Trigger.isAfter && (Trigger.isInsert ||
Trigger.isUpdate)) {

LaptopBookingHandler.sendEmailNotification(Trigger.new);
    }
}

```

2. Handler Class:

```

java
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 Customer,\nWelcome to
Laptop Rentals! ...';
        email.setPlainTextBody(body);
        Messaging.sendEmail(new
List<Messaging.SingleEmailMessage>{email});
    }
}
}

```


Apex Classes

Apex Code is an object oriented programming language that allows developers to develop on-demand business applications on the Lightning Platform.

Percent of Apex Used: 0.02%
You are currently using 1,155 characters of Apex Code (excluding comments and @isTest annotated classes) in your organization, out of an allowed limit of 6,000,000 characters. Note that the amount in use includes both Apex Classes and Triggers defined in your organization.

Estimate your organization's code coverage

Compile all classes

View: All Create New View

Apex Classes - Salesforce - Developer Edition

Action	Name	Namespace Prefix	Api Version	Status	Size Without Comments	Last Modified By	Has Trace Flags
Edit Del Security	LaptopBookingHandler		62.0	Active	893	Evelina Mathura, 09/01/2025, 9:11 am	<input type="checkbox"/>
Edit Del Security	LaptopBookingHandlerTest		62.0	Active	42	Evelina Mathura, 09/01/2025, 9:12 am	<input type="checkbox"/>

Dynamic Apex Classes

Dynamic Apex extends your programming reach by interacting with Lightning Platform components.

View: All Create New View

Class Name	Namespace Prefix	Api Version	Created By	Last Modified By
No records to display.				

Apex Triggers

This page allows you to view and modify all the triggers in your organization. To create a new trigger, navigate to the appropriate sObject triggers page.

Percent of Apex Used: 0.02%
You are currently using 1,155 characters of Apex Code (excluding comments and @isTest annotated classes) in your organization, out of an allowed limit of 6,000,000 characters. Note that the amount in use includes both Apex Classes and Triggers defined in your organization.

Compile all triggers

View: All Create New View

Action	Name	Namespace Prefix	sObject Type	Api Version	Status	Size Without Comments	Last Modified By	Has Trace Flags
Edit Del	LaptopBookings		Laptop_Bookings	62.0	Active	220	Evelina Mathura, 09/01/2025, 9:11 am	<input type="checkbox"/>

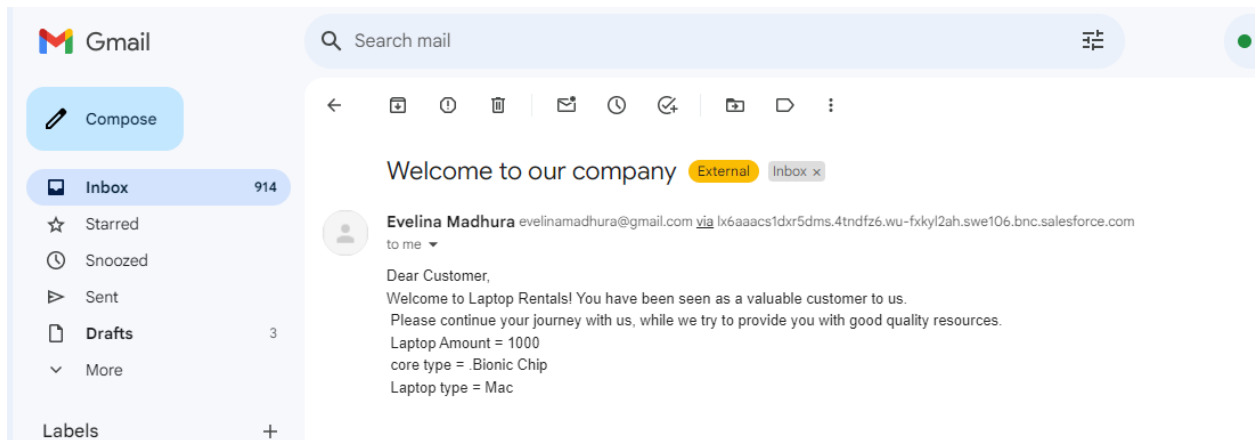
9. Reporting

1. Create a Report:

- **Report Type:** Consumer with Laptop Bookings and Total Laptops.
- Add fields (e.g., Amount) and group rows for summaries.
- Save and run.

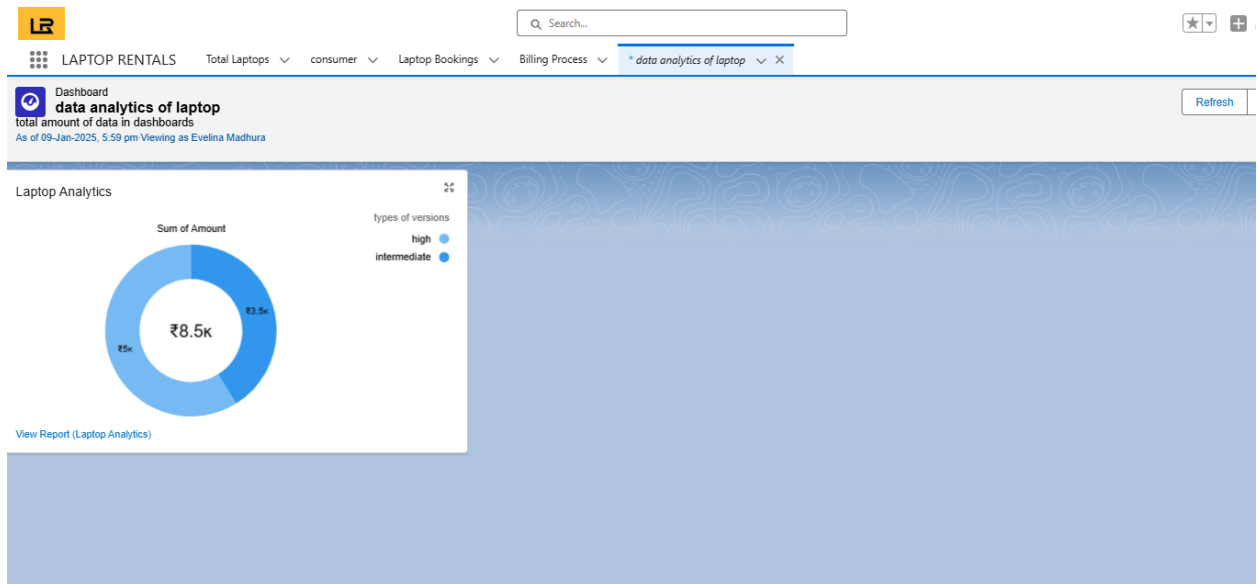
2. Email Notifications:

- Subscribe to the report for daily updates.



Final Notes

- Populate test data for all objects (10–12 records).
- Ensure API names match your org's configuration.
- Customize reports for meaningful insights.



Testing and Validation

1. Unit Testing

- **Validation Rules:**

- Tested the `Phonenumberoremailblankrule` to ensure it correctly prevents record creation when the `Phone Number` or `Email` fields are blank.
- Verified that proper error messages are displayed for users when validation fails.
- **Triggers:**
 - Tested the `LaptopBooking` trigger to ensure email notifications are sent upon the creation or update of `Laptop Bookings` records.
 - Checked edge cases like missing email addresses or invalid email formats.
- **Flows:**
 - Tested the `Laptop Distributions` flow for correct allocation of rates based on laptop type and booking duration.
 - Validated each decision element and ensured records are updated correctly.

2. Integration Testing

- **Profiles and Roles:**
 - Verified that `Owner` and `Agent` profiles and roles have the appropriate permissions for objects and fields.
 - Tested user access control by logging in as both `Owner` and `Agent` users.
- **Custom Tabs and Lightning App:**
 - Tested navigation and functionality of custom tabs for `Total Laptops`, `Laptop Bookings`, and `Consumers` within the Lightning App.
 - Ensured seamless integration between objects and tabs.
- **Email Notifications:**
 - Validated integration with Salesforce's email system.
 - Checked for successful email delivery to customers after

booking creation or updates.

3. Functional Testing

- **Object Relationships:**
 - Tested relationships between objects (e.g., `Consumer`, `Laptop Bookings`, and `Total Laptops`) to ensure correct data linking.
 - Verified lookups and master-detail fields.
- **Reports:**
 - Created test reports to ensure accurate aggregation and grouping of data.
 - Tested scheduled report emails to validate correct formatting and timely delivery.

4. Regression Testing

- **System Updates:**
 - Re-tested all functionalities after making changes to validation rules, triggers, or field configurations to ensure no new bugs were introduced.
 - Validated backward compatibility with existing data.

5. Data Validation

- **Test Data Creation:**
 - Inserted 10–12 test records for `Total Laptops`, `Consumers`, `Laptop Bookings`, and `Billing Process` objects to simulate real-world scenarios.
 - Checked that all fields, including calculated fields (e.g., `Total Amount`), are populated correctly.
- **Duplicate Prevention:**
 - Ensured the system prevents duplicate records by testing unique constraints on fields like `Email` or `Invoice Number`.

6. User Acceptance Testing (UAT)

- **Test with End Users:**
 - Collaborated with the intended users (Owner and Agent profiles) to test the system's usability and effectiveness.
 - Collected feedback and made minor adjustments to improve user experience.
- **Scenario-Based Testing:**
 - Simulated real-world scenarios like bulk laptop bookings, cancellations, and generating invoices.
 - Verified the system's behavior under various conditions.

7. Performance Testing

- **Data Load Testing:**
 - Tested system performance with a larger dataset to ensure it handles high volumes of records without lag.
 - Checked flow execution time for multiple records.
- **Email Sending Speed:**
 - Measured the time taken to send bulk email notifications to ensure timely delivery.

8. Error Handling Validation

- **Validation Errors:**
 - Verified that users receive meaningful error messages when entering invalid data or violating rules.
 - Ensured the system gracefully handles trigger or flow failures.
- **Debug Logs:**
 - Used Salesforce debug logs to identify and resolve issues during trigger and flow execution.

Key Scenarios Addressed

1. Customer Communication:

- Send personalized emails for promotions, rental confirmations, and overdue reminders.

2. Inventory Management:

- Track available laptops and rentals in progress in real time.

3. Rental Lifecycle Management:

- Automate the workflow from rental request to return, ensuring timely delivery and pickup.

4. Customer Data Analysis:

- Utilize Salesforce analytics to analyze customer preferences and refine services for better engagement.

Project Conclusion

The CRM Application for Laptop Rentals effectively demonstrates the power of Salesforce in addressing industry-specific challenges. By integrating Sales Cloud, Marketing Cloud, and Service Cloud, the solution provides a comprehensive platform to:

- Enhance customer relationships through personalized communication.
- Streamline rental processes for operational efficiency.
- Deliver actionable insights for informed decision-making.