

Salesforce CRM Solution for Laptop Rental Management

Project Overview:

This project is dedicated to developing a robust CRM application tailored for managing laptop rentals within a business environment using the Salesforce platform. The primary goal is to tackle operational challenges, including handling rental requests efficiently, monitoring inventory, and facilitating effective communication with customers. Leveraging Salesforce's strengths in automation, workflow optimization, and data storage, this CRM application aims to:

1. Optimize the Rental Workflow: Streamline the booking and return processes to reduce time and minimize manual intervention required for each rental.
2. Enhance Customer Satisfaction: Send timely email notifications to customers for booking confirmations and return reminders.
3. Increase Data Accuracy and Insightful Reporting: Provide real-time visibility into laptop inventory and rental status, empowering staff to make informed, quick decisions.

Objective Goals:

1. Streamline the laptop rental and return processes to minimize manual effort, enhancing efficiency and accuracy.
2. Strengthen customer management practices to improve service quality and foster lasting customer relationships.
3. Implement precise tracking and reporting for laptop inventory to ensure accurate availability and effective asset management

Specific outcomes:

- A customized Salesforce CRM application designed to manage rental services with an intuitive interface, allowing users to easily view, manage, and track rental activity.
- Automated workflows streamline the handling of rental requests, provide real-time status updates, and send email notifications.
- Comprehensive reports and dashboards deliver real-time insights into inventory levels, rental activity, and customer engagement.

Salesforce Key Features and Concepts Utilized:

This section details the core Salesforce functionalities and tools used in the Laptop Rentals CRM application.

- **Custom Objects and Fields:**

- Created a custom object, `Laptop_Bookings__c`, to manage rental bookings with fields for Customer Name, Email, Amount, Core, Laptop Type, and Status.
- Set up a `Laptops__c` object to track inventory, capturing details like model, specifications, and availability.

- **Apex Triggers and Classes:**

- Developed an `AfterInsert` trigger (`LaptopBooking`) to send automated confirmation emails when a booking is made. The `LaptopBookingHandler` class formats and personalizes these emails with customer details.

- **Process Automation with Process Builder and Flows:**

- Designed a Process Builder flow to manage booking status changes (e.g., from "Booked" to "In Use" to "Returned") without manual updates.

- **Validation Rules for Data Accuracy:**

- Added rules to enforce data quality, requiring key fields like Email and Amount for complete booking records.

- **Reports and Dashboards:**

- Created dashboards and reports to provide insights on **inventory, rental volumes, popular laptop models**, and customer demographics, supporting strategic planning and resource allocation.

Detailed Steps to Solution design:

The solution was carefully designed in multiple steps, covering data models, user - interface, and business logic. Here’s an overview:

- **Data Model Design:**
 - Created **Laptop_Bookings__c** and **Laptops__c** custom objects.
 - Established relationships between **Laptop_Bookings__c** and standard Salesforce objects (Account or Contact) to connect customers with their respective bookings.
 - Additional fields, such as **Email__c**, **Amount__c**, **Core__c**, and **Laptop_Type__c**, are used to store booking-specific data. Relationships between objects are established to link the **Laptop_Bookings__c** object with other standard or custom objects (e.g., Account, Contact) to enhance data integrity and support comprehensive reporting.

Fields Included in the **LaptopBookings** object:

SetupHomeObject Manager

SETUP > OBJECT MANAGER

Laptop Bookings

DetailsFields & RelationshipsPage LayoutsLightning Record PagesButtons, Links, and ActionsCompact LayoutsField SetsObject LimitsRecord TypesRelated Lookup FiltersSearch LayoutsList View Button LayoutRestriction RulesScoping RulesObject AccessTriggers

Fields & Relationships

11 Items, Sorted by Field Label

Q Quick Find

NewDeleted FieldsField DependenciesSet History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Currency(18, 0)		
core type	core__c	Picklist	Laptop names	
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
how many months	how_many_months__c	Picklist		
Laptop Bookings	Name	Text(80)		✓
Laptop names	Laptop_type__c	Picklist		
Laptops Available	Laptops_Available__c	Formula (Number)		
Last Modified By	LastModifiedById	Lookup(User)		
name	name__c	Master-Detail(consumer)		✓
Total No Of Laptops	Total_No_Of_Laptops__c	Master-Detail(Total Laptops)		✓

User Interface (UI) Design:

The custom Lightning app **Laptop Rentals** features easy navigation with tabs for key components, including **Bookings**, **Reports**, and **Dashboards**.

- Configured Page Layouts for **Laptop_Bookings__c** and **Laptops__c** with relevant fields, sections, and related lists for ease of access.
- Designed dashboards for quick visual insights on active rentals, availability and top-performing laptops.
- Custom Lightning components may be added to enhance specific sections, such as displaying a chart of most rented laptop models.

Navigation Items on Laptop Rental Application:

The screenshot displays the Lightning App interface for 'LAPTOP RENTALS'. The top navigation bar includes a search bar and utility icons. The main navigation tabs are 'Total Laptops', 'consumer', 'Laptop Bookings', and 'Billing Process'. The 'consumer' tab is active, showing a 'Recently Viewed' section with 9 items. The list includes a header row for 'consumer_name' and a table of 9 consumers with checkboxes and dropdown menus.

	<input type="checkbox"/> consumer_name	
1	<input type="checkbox"/> Nitish	▼
2	<input type="checkbox"/> Sarvindh	▼
3	<input type="checkbox"/> Durga Prasad	▼
4	<input type="checkbox"/> Vinay Grandhi	▼
5	<input type="checkbox"/> Deepika Javvadi	▼
6	<input type="checkbox"/> Srinu	▼
7	<input type="checkbox"/> Mahesh Teki	▼
8	<input type="checkbox"/> Saion karmokar	▼
9	<input type="checkbox"/> Ganesh javvadi	▼



LAPTOP RENTALS

Total Laptops

consumer

Laptop Bookings

Billing Process

Search...



Laptop Bookings

Recently Viewed

New Import Assign Label

9 items • Updated a few seconds ago

Search this list...



Laptop Bookings		
1	<input type="checkbox"/> Amazon	
2	<input type="checkbox"/> Shop clues	
3	<input type="checkbox"/> Factory Deals	
4	<input type="checkbox"/> srikanth computers	
5	<input type="checkbox"/> Tata Neu	
6	<input type="checkbox"/> Smart internz	
7	<input type="checkbox"/> Croma	
8	<input type="checkbox"/> Snapdeal	
9	<input type="checkbox"/> Michael Electronics	



LAPTOP RENTALS

Total Laptops

consumer

Laptop Bookings

Billing Process

Search...



Billing Process

Recently Viewed

New Import Assign Label

9 items • Updated a few seconds ago

Search this list...

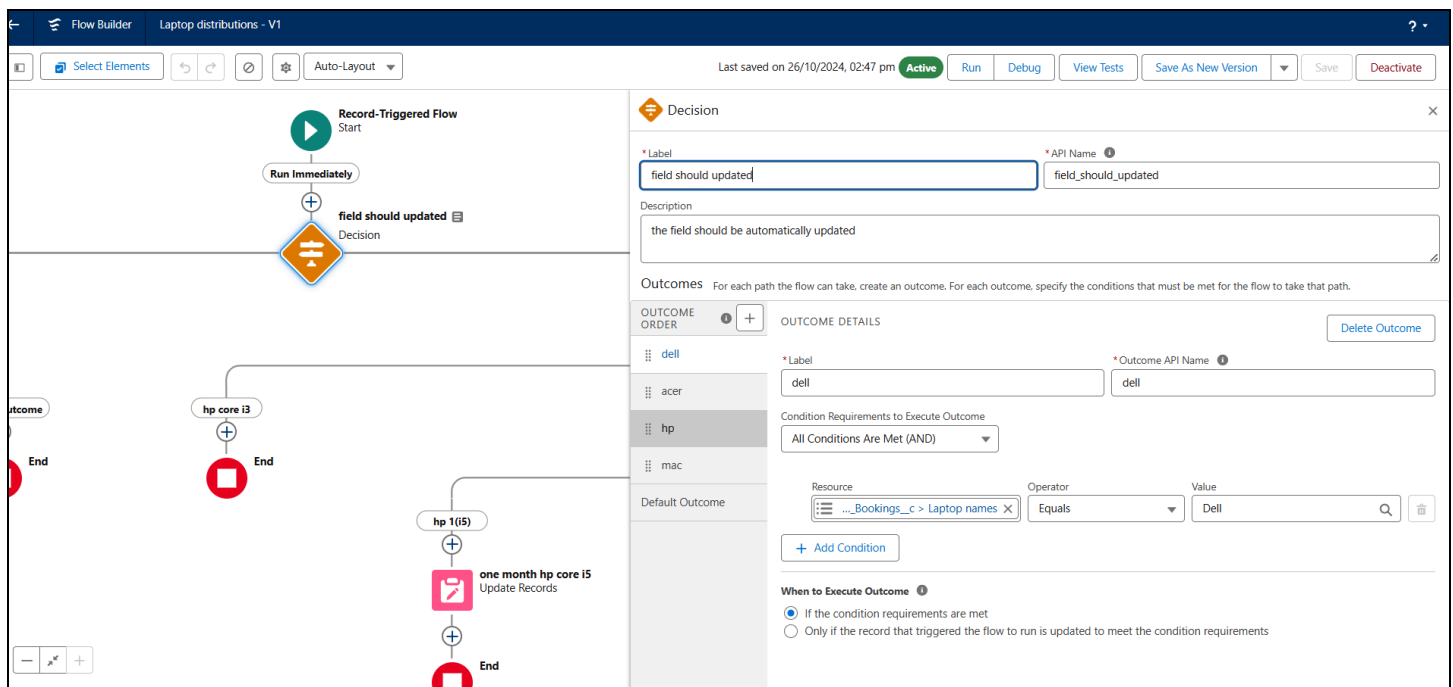


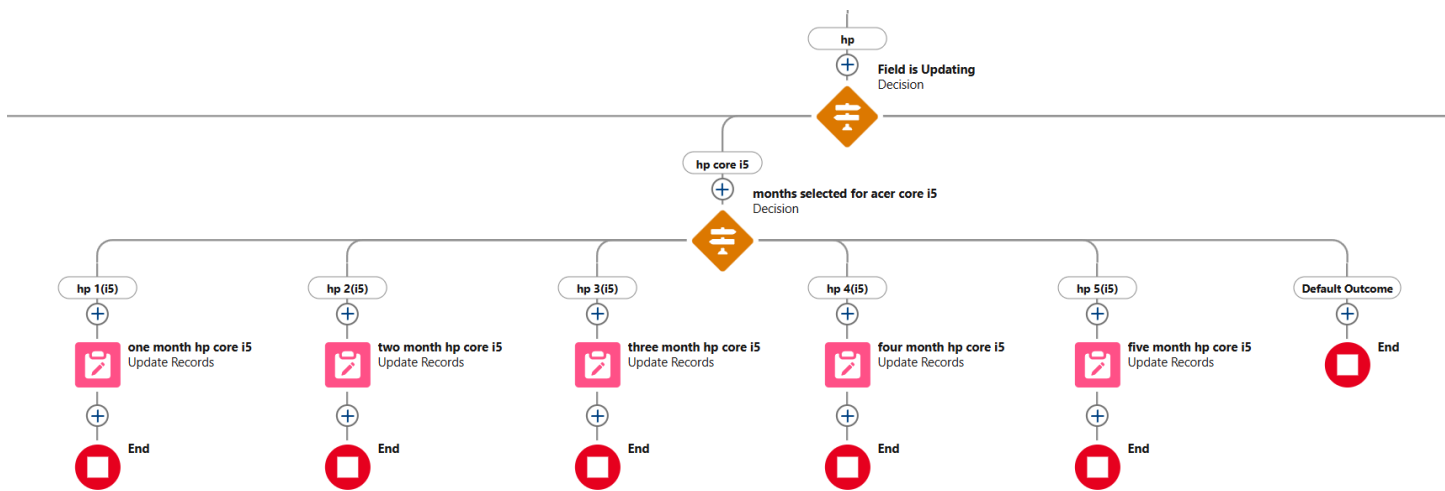
Billing Process Name		
1	<input type="checkbox"/> online	
2	<input type="checkbox"/> offline	
3	<input type="checkbox"/> offline	
4	<input type="checkbox"/> online	
5	<input type="checkbox"/> online	
6	<input type="checkbox"/> online	
7	<input type="checkbox"/> offline	
8	<input type="checkbox"/> offline	
9	<input type="checkbox"/> online	

Business Logic Design:

- Developed the LaptopBookingHandler class to handle email notifications using **Messaging.SingleEmailMessage**.
- Added the **AfterInsert** trigger on **Laptop_Bookings__c** to initiate sendEmailNotification method, ensuring customers receive a welcome and confirmation email after booking.

Flow Automation:

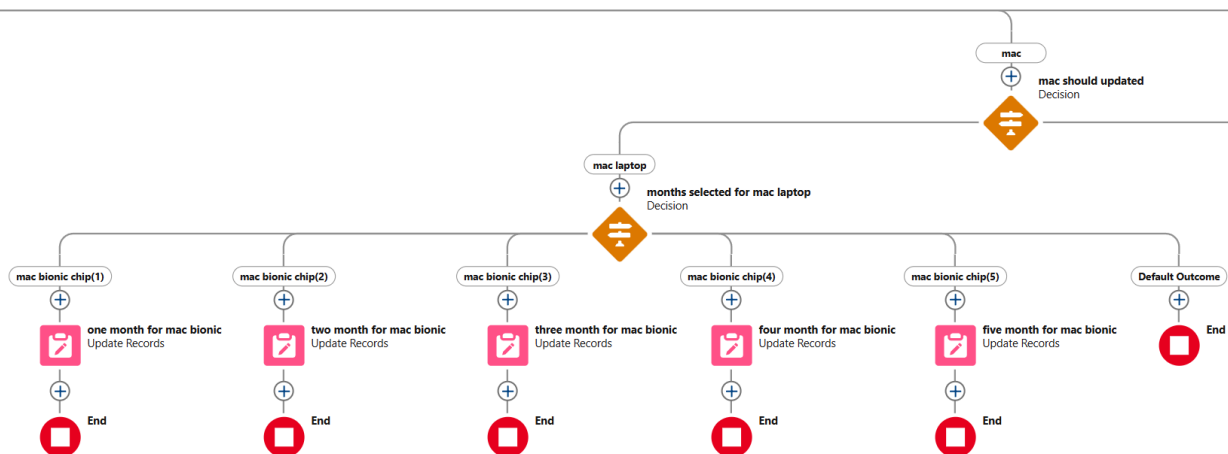


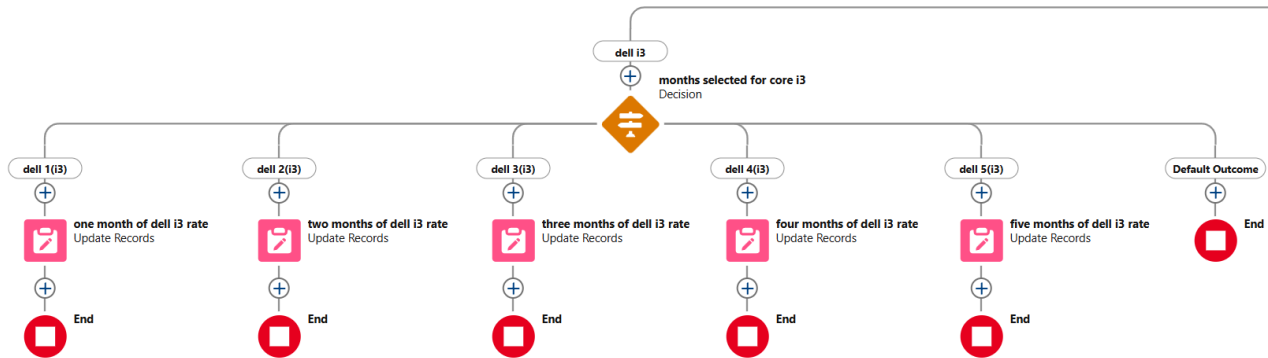


Flow Builder Laptop distributions - V1

Select Elements Auto-Layout

Last saved on 26/10/2024, 02:47 pm Active Run Debug View Tests Save As New Version Save Deactivate





Update Records

* Label

one month of dell i3 rate

* API Name ⓘ

one_month_of_dell_i3_rate

Description

* 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

Amount_c

Value

1000

+ Add Field

Validation Rule:

SETUP > OBJECT MANAGER

consumer

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Validation Rules

1 Items. Sorted by Rule Name

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Phonenumberoremailblankrule	Top of Page	please fill the phone number and email id	✓	LAKSHMI VENKATA SATYA GANESH JAVADI, 26/10/2024, 12:03 pm

Conditional Formula:

[SETUP](#) > [OBJECT MANAGER](#)
consumer

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

consumer Validation Rule

[Back to consumer](#)

[Help for this Page](#)

Validation Rule Detail


Rule Name	Phonenumberoremailblankrule	Active	✓
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	LAKSHMI VENKATA SATYA GANESH JAWVAJI, 26/10/2024, 12:03 pm	Modified By	LAKSHMI VENKATA SATYA GANESH JAWVAJI, 26/10/2024, 12:03 pm

Edit
Clone

Edit
Clone

- ## APEX Classes:

Created Apex class with name of **LaptopBookingHandler**

 **Apex Classes**

Apex Class

LaptopBookingHandler

Help for this Page

Apex Class Detail

EditDeleteDownloadSecurityShow Dependencies

NameLaptopBookingHandler

StatusActive

Namespace Prefix

Code Coverage100% (13/13)

Created ByLAKSHMI VENKATA SATYA GANESH JAVVADI , 26/10/2024, 3:01 pm

Last Modified ByLAKSHMI VENKATA SATYA GANESH JAVVADI , 29/10/2024, 10:23 pm

Class Body

Class Summary


Version Settings

Trace Flags

```
1 public class LaptopBookingHandler {
2     public static void sendEmailNotification(List<Laptop_Bookings__c> lapList) {
3         for (Laptop_Bookings__c lap : lapList) {
4             Messaging.SingleEmailMessage email = new Messaging.SingleEmailMessage();
5             email.setToAddresses(new List<String>{lap.Email__c});
6             email.setSubject('Welcome to our company');
7             String body = 'Dear ' + lap.Name + ', \n';
8             body += 'Welcome to Laptop Rentals! You have been seen as a valuable customer to us.\n';
9             body += 'Please continue your journey with us, while we try to provide you with good quality resources.\n';
10            body += 'Laptop Amount = ' + lap.Amount__c + '\n';
11            body += 'Core Type = ' + lap.core__c + '\n';
12            body += 'Laptop Type = ' + lap.Laptop_type__c;
13            email.setPlainTextBody(body);
14            Messaging.sendEmail(new List<Messaging.SingleEmailMessage>{email});
15        }
16    }
17 }
```

EditDeleteDownloadSecurityShow Dependencies

Created Apex class with name of **LaptopBookingHandlerTest**

 **Apex Classes**

Apex Class

LaptopBookingHandlerTest

Help for this Page

Apex Class Detail

EditDeleteDownloadRun TestShow Dependencies

NameLaptopBookingHandlerTest

StatusActive

Namespace Prefix

Created ByLAKSHMI VENKATA SATYA GANESH JAVVADI , 29/10/2024, 9:21 pm

Last Modified ByLAKSHMI VENKATA SATYA GANESH JAVVADI , 30/10/2024, 12:00 pm

Class Body

Class Summary

Version Settings

Trace Flags

```
1 // Test Class
2 @isTest
3 private class LaptopBookingHandlerTest {
4     @isTest
5     static void testSendEmailNotification() {
6         // Setup test data for consumer
7         consumer__c consumer = new consumer__c(
8             Name = 'John Doe',
9             Phone_number__c = '9887346134',
10            Address__c = 'Paris, France',
11            Email__c = 'johndoe@example.com',
12            consumer_Status__c = 'Student'
13        );
14        insert consumer;
15
16        // Setup test data for total laptops
17        Total_Laptops__c totalLaptops = new Total_Laptops__c(
18            Name = '1'
19        );
20        insert totalLaptops;
21
22        // Setup test data for laptop booking
23        Laptop_Bookings__c testBooking = new Laptop_Bookings__c(
24            Name = 'Booking1',
25            name__c = consumer.Id,
26            Email__c = consumer.Email__c,
27            Amount__c = 0.00
```

- **Apex Triggers:**
Created an APEX Trigger with name of **LaptopBooking**

Setup

Home

Object Manager

Q apex tr

Custom Code

Apex Triggers

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

Apex Triggers

Apex Trigger Detail

Name

LaptopBooking

Edit

Delete

Download

Show Dependencies

Code Coverage

100% (2/2)

Object Type

Laptop Bookings

Status

Active

Created By

AKSHMI VENKATA SATYA GANESH JAVVADI, 26/10/2024, 3:07 pm

Last Modified By

AKSHMI VENKATA SATYA GANESH JAVVADI, 30/10/2024, 12:02 pm

Namespace Prefix

Apex Trigger

Version Settings

Trace Flags

1

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

2

 if (Trigger.isAfter && (Trigger.isInsert || Trigger.isUpdate)) {

3

 LaptopBookingHandler.sendEmailNotification(Trigger.new);

4

 }

5

}

Edit

Delete

Download

Show Dependencies

File

Edit

Debug

Test

Workspace

Help

LaptopBookingHandler.apxc

LaptopBooking.apxt

Billing_Process__c

LaptopBookingHandlerTest.apxc

Code Coverage: None

API Version: 62

Go To

1

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

2

 if (Trigger.isAfter && (Trigger.isInsert || Trigger.isUpdate)) {

3

 LaptopBookingHandler.sendEmailNotification(Trigger.new);

4

 }

5

 }

Logs

Tests

Checkpoints

Query Editor

View State

Progress

Problems

status

Test Run

Enqueued Time

Duration

Failures

Total

Overall Code Coverage

Class

Percent

Lines

Overall

100%

LaptopBooking

100%

2/2

LaptopBookingHandler

100%

13/13

Reports and Dashboards:

Reports and dashboards in Salesforce provide valuable insights into the Laptop rentals CRM application, helping the business monitor bookings, revenue, and customer trends effectively.

Reports:

- **Tabular Reports:** Used for simple lists, such as a full list of active laptop bookings or consumer records, giving a quick snapshot of data.
- **Summary Reports:** Offers data with grouped subtotals, such as revenue grouped by laptop type, making it easy to identify high performing categories.

Dashboards:

- **Revenue Overview:** Shows total rental revenue over time, helping track financial performance.
- **Popular Laptops:** Displays the most rented laptop types, aiding in inventory and marketing decisions.
- **Customer Insights:** Provides data on customer types, helping target future marketing campaigns more effectively.

Report: consumer with Laptop Bookings and Total Laptops

Consumers with laptops and Total Laptops

Total Records

9

Total Amount

₹18,500

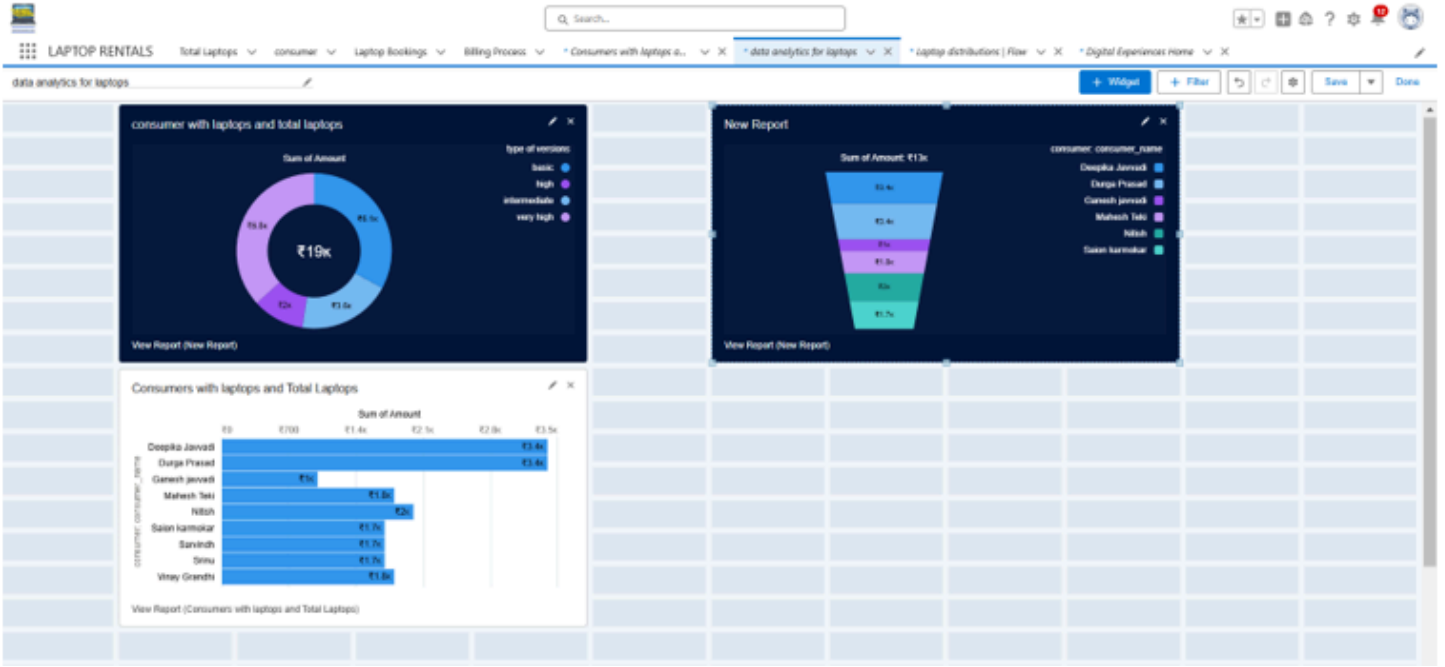
<input type="checkbox"/> consumer: consumer_name	Laptop Bookings: Laptop Bookings	Laptop names	Address	Phone number	type of versions	Amount
<input type="checkbox"/> Deepika Javvadi (1)	Croma	Mac	Tanuku	9398341710	high	₹3,400
Subtotal						₹3,400
<input type="checkbox"/> Durga Prasad (1)	Tata Neu	Hp	kakinada	7396433224	high	₹3,400
Subtotal						₹3,400
<input type="checkbox"/> Ganesh javvadi (1)	Michael Electronics	Dell	Tanuku	7780617696	intermediate	₹1,000
Subtotal						₹1,000
<input type="checkbox"/> Mahesh Teki (1)	Amazon	Acer	undrajavaram , Tanuku	8074643716	high	₹1,800
Subtotal						₹1,800
<input type="checkbox"/> Nitish (1)	Shop clues	Dell	Rajahmundry	9912930336	high	₹2,000
Subtotal						₹2,000
<input type="checkbox"/> Saion karmokar (1)	Snapdeal	Mac	Swetha Hospital,Tanuku	7993258988	intermediate	₹1,700
Subtotal						₹1,700
<input type="checkbox"/> Sarvindh (1)	Factory Deals	Mac	jagayyapeta@vishnu.edu.in	8978109692	intermediate	₹1,700
Subtotal						₹1,700
<input type="checkbox"/> Srinu (1)	Smart internz	Hp	Tanuku	9848131118	intermediate	₹1,700
Subtotal						₹1,700
<input type="checkbox"/> Vinay Grandhi (1)	srikanth computers	Acer	Kakinada	9381691645	high	₹1,800
Subtotal						₹1,800
Total (9)						₹18,500

Row Counts

Detail Rows

Subtotals

Grand Total



Testing and Validation:

- **Unit Testing:**

Each Apex class and trigger was thoroughly tested, ensuring at least 75% code coverage. Tests were designed to validate that:

- Booking confirmation emails are sent correctly.
- Inventory statuses update accurately.

- **User Interface Testing:**

Verified that the UI elements display correctly on page layouts and that all required fields and related lists are accessible. Ensured users could access only the fields allowed by their profile permissions.

- **Test Scenarios:**

- **Scenario 1:** Create a new booking and verify that an email is sent with the correct booking details.


- **Scenario 2:**

Check that validation rules enforce required fields like Email__c and Amount__c.

- **Scenario 3:**

Test that inventory adjust automatically when a booking status is changed from "Booked" to "Returned."

- **Apex class:**
Create a Testing class **LaptopBookingTest.apxc**

 **Apex Classes**

Apex Class

LaptopBookingHandlerTest

Help for this Page

Apex Class Detail

EditDeleteDownloadRun TestShow Dependencies

NameLaptopBookingHandlerTest

StatusActive

Namespace Prefix

Created ByLAKSHMI VENKATA SATYA GANESH JAVVADI , 29/10/2024, 9:21 pm

Last Modified ByLAKSHMI VENKATA SATYA GANESH JAVVADI , 30/10/2024, 12:00 pm

Class Body

Class Summary

Version Settings

Trace Flags

```
1 // Test Class
2 @isTest
3 private class LaptopBookingHandlerTest {
4     @isTest
5     static void testSendEmailNotification() {
6         // Setup test data for consumer
7         consumer__c consumer = new consumer__c(
8             Name = 'John Doe',
9             Phone_number__c = '9887346134',
10            Address__c = 'Paris, France',
11            Email__c = 'johndoe@example.com',
12            consumer_Status__c = 'Student'
13        );
14        insert consumer;
15
16        // Setup test data for total laptops
17        Total_Laptops__c totalLaptops = new Total_Laptops__c(
18            Name = '1'
19        );
20        insert totalLaptops;
21
22        // Setup test data for laptop booking
23        Laptop_Bookings__c testBooking = new Laptop_Bookings__c(
24            Name = 'Booking11',
25            name__c = consumer.Id,
26            Email__c = consumer.Email__c,
27            Amount__c = 0.00
```


Key Scenarios Addressed by Salesforce in the Implementation Project:

This project addresses several critical scenarios to ensure a smooth rental experience for both customers and staff:

- **Automated_Notifications:**
Automatically send confirmation emails when a booking is created and provide status updates as the rental progresses. This keeps customers informed and reduces the workload for staff.
- **Real-Time_Inventory_Management:**
Track the availability of laptops in real time, updating inventory counts when laptops are rented and returned.
- **Workflow_Automation_for_Booking_Lifecycle:**
Manage booking statuses with automation, moving each booking from "Booked" to "In Use" and finally "Returned" without manual intervention.
- **Role-Based_Data_Access:**
Define roles and permissions, allowing staff to manage bookings and customers, while customers can only access their rental information.

Conclusion:

The **Laptop Rentals CRM** application demonstrates an effective use of Salesforce to automate and manage key rental business processes. Leveraging custom objects, Apex programming, and flow automation, the project streamlines data management and enhances customer interactions. Key features like email notifications, dynamic pricing, and streamlined booking processes have improved both customer experience and operational efficiency.

Salesforce's reporting and dashboard tools offer valuable insights into rental trends, revenue tracking, and decision-making. With validation rules and role-based access, the solution ensures data security and integrity, supporting sustainable business growth. This project not only meets immediate objectives but also establishes a scalable foundation for future enhancements, positioning Laptop Rentals for long-term success in customer satisfaction and operational efficiency.