

CRM Application for Laptop Rentals

Project Overview:

This project focuses on developing a comprehensive **CRM (Customer Relationship Management) platform** tailored for managing laptop rentals. It leverages advanced features of CRM to streamline inventory management, rental scheduling, client communications, and billing processes. The solution ensures operational efficiency, reduces manual errors, and enhances customer satisfaction through effective engagement and automation.

Objectives:

1. Business Goals:

- Efficiently track inventory, rental durations, and available laptops.
- Automate client communications and billing reminders.
- Ensure seamless transactions via integration with modern payment systems.

2. Specific Outcomes:

- Real-time insights into inventory and customer interactions.
- Interactive dashboards for visualizing rentals, revenue, and feedback trends.
- Enhanced operational workflow through automation.

Key Features and Technologies:

1. Custom Objects:

- Laptops
- Clients
- Rentals

- Payments
- 2. **Business Logic Automation:**
 - Triggers for automated reminders for rental due dates.
 - Notifications for inventory updates.
- 3. **Custom UI Design:**
 - Responsive web design for managing rentals, inventory, and clients.
- 4. **Reporting and Dashboards:**
 - Real-time data visualization of revenue, rentals, and stock.
- 5. **Integration:**
 - Linked to popular payment platforms for smooth financial transactions.

Solution Design:

Data Models

- **Custom Relationships:**
 - **Clients, Rentals, and Inventory** are connected using master-detail and lookup relationships for smooth data management.
- Fields include:
 - Laptop specifications (Type, Core, RAM, etc.)
 - Client details (Email, Phone, Status)
 - Rental duration, costs, and status.

Interface Development

- **Responsive Tabs:** For easy access to inventory, bookings, and client details.
- **Filters:** Quick filtering options for rentals by date, type, and status.

Automation Rules:

- **Triggers:**
 - Overdue reminders for rental returns.
 - Auto-update for inventory availability.
- **Validation Rules:**
 - Ensure mandatory fields (e.g., phone and email) are filled for seamless operations.

Implementation Steps:

1. **Creating Salesforce Developer Account:**
 - Signup via [Salesforce Developer](#).
 - Configure custom objects for managing data.
2. **Custom Objects:**
 - **Laptops:** Manage inventory.
 - **Consumers:** Track client interactions.
 - **Laptop Bookings:** Monitor rentals and durations.
 - **Billing Process:** Automate invoice generation.
3. **Tabs and Navigation:**
 - Create custom tabs for Laptops, Rentals, and Billing.
 - Organize these under a unified Lightning App for seamless navigation.
4. **Field Creation:**
 - Standard Fields: Predefined by Salesforce.
 - Custom Fields: Specific to client needs (e.g., Laptop Type, Rental Duration, Payment Mode).
5. **Roles and Profiles:**
 - Owner Profile: Full access to all CRM features.
 - Agent Profile: Limited access, focusing on rental management.

Automation Features:

Flows

- Automate pricing based on rental duration and laptop type.
- Trigger notifications and emails based on rental milestones.

Apex Triggers

- Automated email notifications for new and updated rentals.
- Ensure real-time communication with customers.

Validation Rules

- Example: Ensure both phone number and email fields are non-blank to process rental records.

Reporting and Dashboards:

1. Reports:

- Types: Tabular, Summary, Matrix, and Joined.
- Example: A report showing consumer bookings grouped by rental duration and laptop type.
- Sharing: Auto-subscription emails sent to the owner summarizing daily activities.

2. Dashboards:

- Visual representation of revenue trends and inventory status.
- Example: Bar charts showing rental frequency of each laptop type.

Testing and Validation:

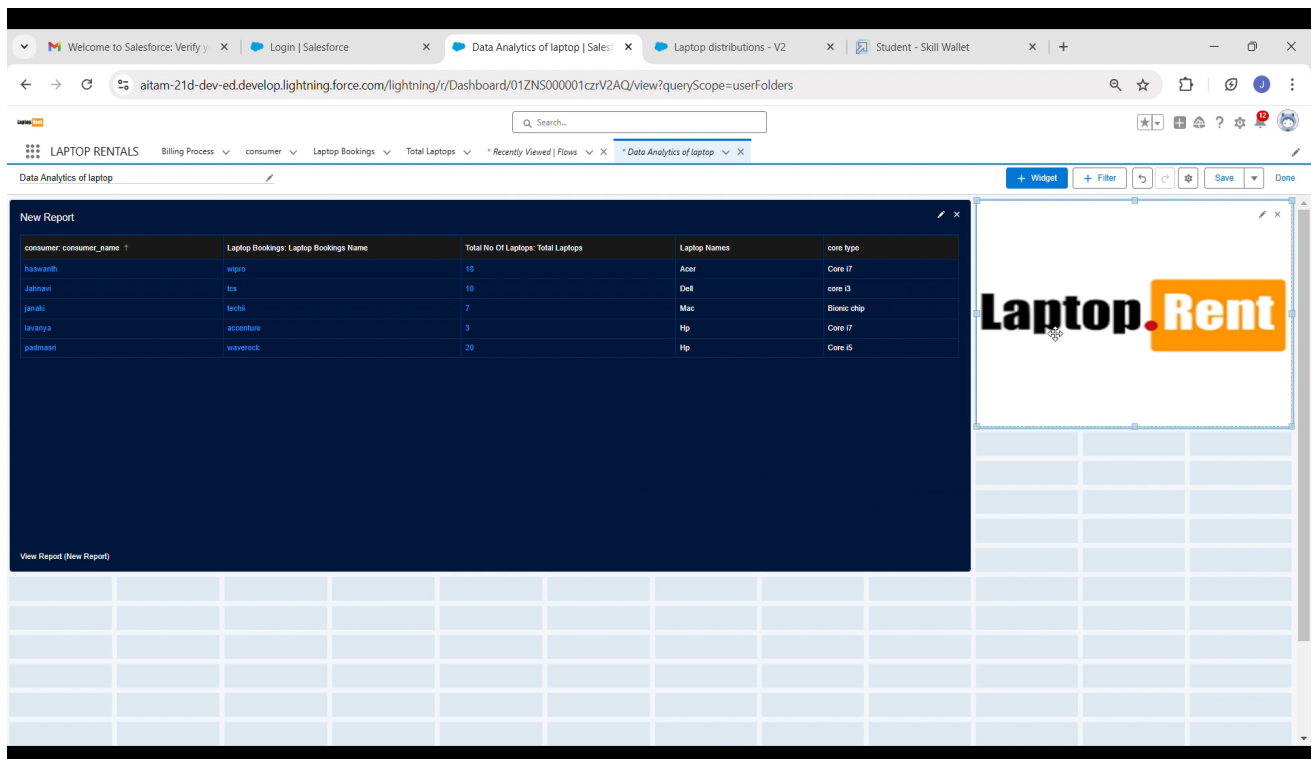
1. Unit Testing:

- Verify triggers and business rules.
- Ensure calculations (e.g., rental amounts) are accurate.

2. UI Testing:

- Test responsiveness across devices.
- Validate navigation flow and data consistency.

OUTPUT:



The screenshot displays a Salesforce Lightning Analytics dashboard for 'Laptop Rentals'. The dashboard includes a 'New Report' widget showing a table of laptop bookings and a 'Laptop.Rent' logo widget.

consumer: consumer_name ↑	Laptop Bookings: Laptop Bookings Name	Total No Of Laptops: Total Laptops	Laptop Names	core type
hazareath	wipro	10	Acer	Core i7
Johanan	tos	10	Dell	core i3
janaki	techs	7	Mac	Bionic chip
javanya	accenture	3	Hp	Core i7
padmasi	wavrock	20	Hp	Core i5

This is the screenshot of the UI for the laptop rentals

Conclusion:

The CRM platform revolutionizes laptop rental management by automating operations, providing real-time updates, and enhancing customer experiences. With dashboards offering actionable insights and integration with payment systems for hassle-free transactions, this solution ensures streamlined workflows and operational excellence.

Benefits:

- Reduced manual errors.
- Enhanced client satisfaction through timely reminders and updates.
- Increased operational efficiency, leading to better customer loyalty.