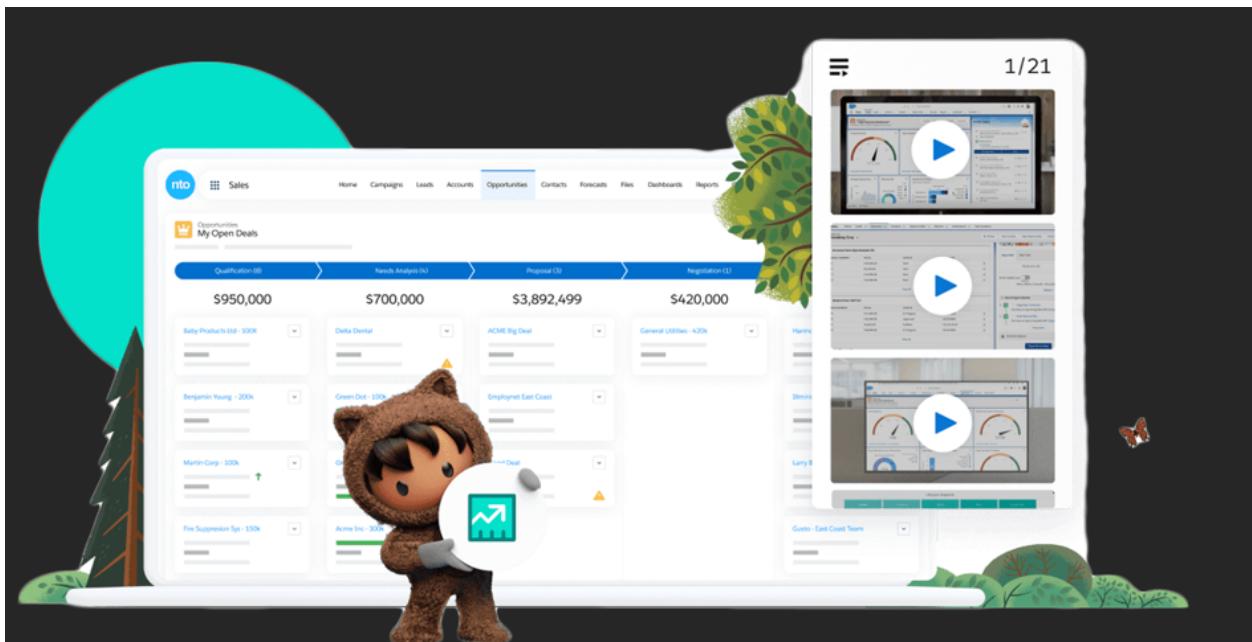


PROJECT:

A CRM APPLICATION FOR LAPTOP RENTALS



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1 Project Overview

This project, "**CRM Application for laptop rentals**" is focused on creating a Salesforce-based application to streamline laptop rental operations. By leveraging custom objects, validation rules, role-based access control, workflow automation, and reporting & dashboarding features within the Salesforce platform, the CRM provides a robust solution for managing the entire rental lifecycle. This comprehensive solution improves customer experience by ensuring timely communication and provides valuable insights for data-driven decision-making, ultimately driving business growth.

1.1 Objectives

Business Goals:

1. To optimize laptop rental operations by streamlining the entire rental process from booking to return.
2. To increase revenue and profitability through effective inventory management.
3. To build customer relationships by collecting valuable customer data and providing personalized service.

Specific Outcomes:

4. **Real-Time Tracking:** Implement a dashboard to monitor laptop availability, rental bookings, customer interactions, and revenue generation.
5. **Automation of Processes:** Streamline rental bookings and inventory management using Salesforce Flows and Triggers.
6. **User-Friendly Interface:** Develop tabs for easy customer onboarding, rental requests, and staff access to relevant information.

7. **Comprehensive Reporting:** Generated detailed reports to analyze rental trends, identify areas for improvement, and track key performance indicators.
8. **Scalability:** Create a flexible and scalable platform that can accommodate a growing number of laptops, customers, and rental requests.

1.2 Salesforce Key Features and Concepts Utilized

Custom Objects and Fields: Created tailored objects to manage laptop inventory, rental bookings, customer information, and payment details.

Lightning App Builder: Designed an intuitive and visually appealing Lightning app interface for users to easily navigate and manage rental requests, track inventory, and access customer information.

Flows and Automation: Implemented automation for rental bookings, payment processing, and inventory updates to improve efficiency.

Triggers: Developed Apex triggers to automate backend processes, such as updating inventory availability upon rental bookings or sending automated email notifications to customers.

Reports and Dashboards: Built dynamic dashboards and reports to provide real-time insights into rental trends, rental revenue etc.

1.3 Detailed Steps to SolutionDesign

Topic no.	Topic Name
1	Creating objects: <ul style="list-style-type: none">a. Create Total Laptops Objectb. Create consumer objectc. Create Laptop Bookings objectd. Create Billing process object
2	Create CustomTabs
3	Create Lightning App
4	Fields: <ul style="list-style-type: none">a. Creating The Field In Consumer Objectb. Creating The Field In Laptop Bookings Objectc. To Create A Fieldsand Relationship To Laptop Bookings And Total Laptops Objectd. Creation of Fields and Relationship For Billing Process Object <small><i>Creating The Field In Total Laptops Object</i></small>
5	Validation Rule: Creating The Validation Rule For Phone Number Field In Consumer Object
6	Profiles: <ul style="list-style-type: none">a. Owner Profileb. Agent Profile
7	Roles And Hierarchy: Creating OwnerRole
8	Users: Create User

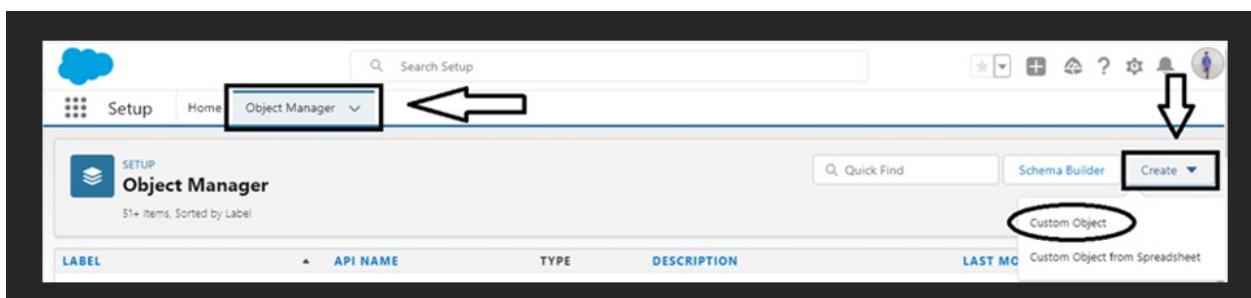
Topic no.	Topic Name
9	<p>Flows:</p> <ul style="list-style-type: none"> a. Create A Flow On Dell Laptop b. Creating FlowOn Acer Laptop c. Creating A Flow On Hp Laptop d. Creating A Flow On Mac Laptop
10	<p>Apex: Apex Trigger And Handler Class</p>
11	<p>Reports:</p> <ul style="list-style-type: none"> a. Create Report b. Sharing Report To Owner
12	<p>Dashboards:</p> <ul style="list-style-type: none"> a. Create Dashboard Folder b. Create Dashboard

1. Creating Objects

Objects in Salesforce are database tables that allow you to store data specific to your organization. Each object comprises records (rows) and fields (columns) that help organize and structure your data efficiently. We use objects to manage and relate various types of information, enabling seamless data tracking, reporting, and analysis within the Salesforce platform. Objects allow users to manage various types of information such as customer accounts, contacts, opportunities, and custom data specific to the organization. Salesforce provides standard objects like Account, Contact, and Opportunity, and users can also create **custom objects** to suit unique business needs.

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.
4. Click on Save.



SETUP New Custom Object

Custom Object Definition Edit

Custom Object Information

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

Label Example: Account
Plural Label Example: Accounts

Starts with vowel sound

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

Object Name Example: Account

Description

Context-Sensitive Help Setting

Open the standard Salesforce.com Help & Training window
 Open a window using a Visualforce page

Content Name -None-

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, and reports. 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 Account Name

Data Type Text

Optional Features

Allow Reports
 Allow Activities
 Track Field History

Object Classification

When these 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 Sharing
 Allow Bulk API Access
 Allow Streaming API Access

Deployment Status

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 list to default page layout
 Launch New Custom Tab Wizard after saving this custom object

Save **Save & New** **Cancel**

1.1 Create Total LaptopsObject

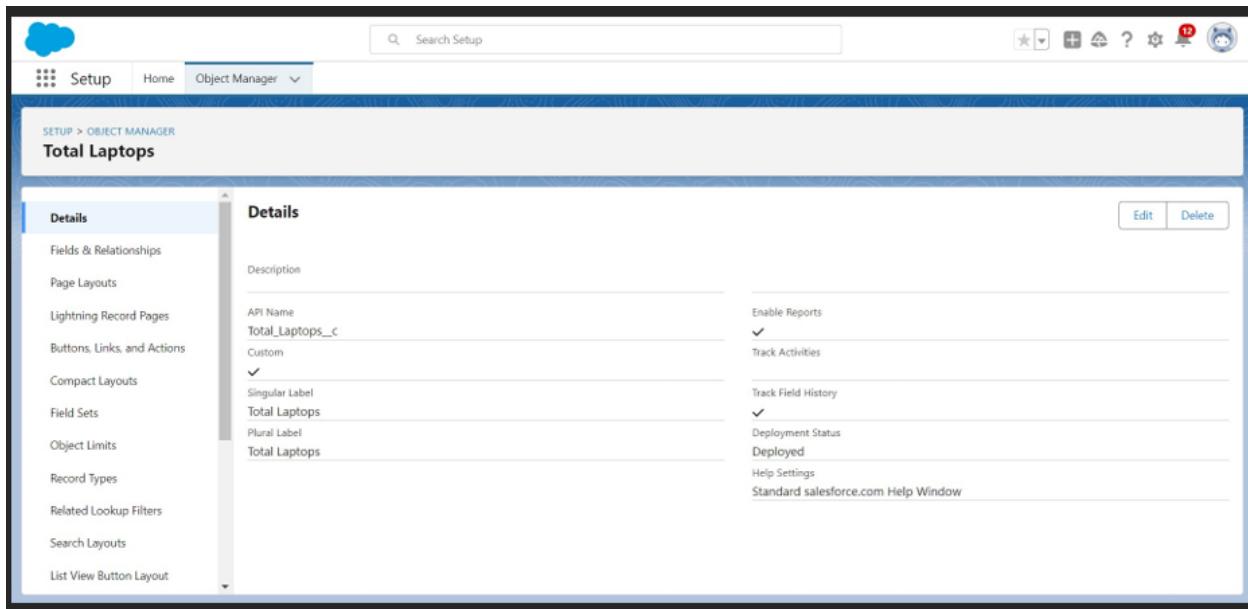
To Createan object:

- i. From the Setup page >>Click on Object Manager >>Click on create
- >> Click on Custom Object.
1. Enter the label name >> Laptops
 2. Plural label name >>Laptops
 3. Enter RecordName Label and Format

Record Name >>Total

Laptops Data Type >> Text

- ii. Click on Allow reports,Allow search and Track Field History.
- iii. Allow search >>Save

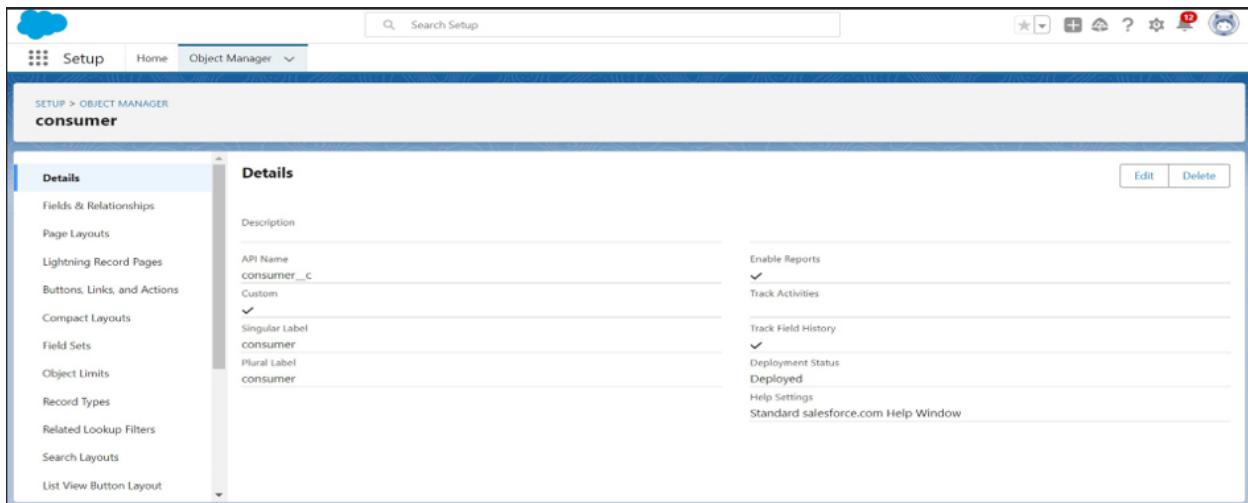


1.2 Create Consumer Object

To Createan object:

- iv. From the Setup page >>Click on Object Manager >>Click on create
>> Click on Custom Object.
 1. Enter the label name >> consumer
 2. Plural label name >>consumer
 3. Enter Record Name Labeland Format Record Name >> consumer_name

- Data Type >>
Name
- v. Click on Allow reports,Allow search and Track Field History.
- vi. Allow search >>Save

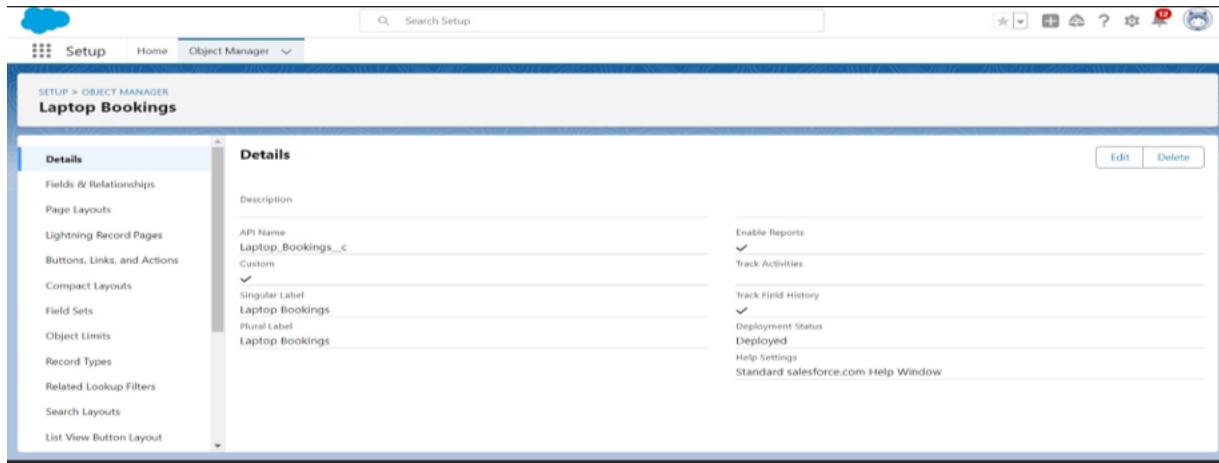


1.3 Create Laptop BookingsObject

To Createan object:

- vii. From the Setup page >>Click on Object Manager >>Click on create
>> Click on Custom Object.
1. Enter the label name >> LaptopBookings
 2. Plural label name >> Laptop Bookings
 3. Enter Record
Name Labeland
Format Record
Name >> Laptop
Bookings Data
Type >> Name
- viii. Click on Allow reports,Allow search and Track Field History.

ix. Allow search >>Save



1.4 Create Billing ProcessObject

To Createan object:

- x. From the Setup page >>Click on Object Manager >>Click on create

>> Click on Custom Object.

1. Enter the label name >> BillingProcess
2. Plural label name >> Billing Process
3. Enter Record Name
Label and Format
Record Name >>
Billing
ProcessName Data
Type >> Name

- xii. Click on Allow reports,Allow search and Track Field History.

- xiii. Allow search >>Save

The screenshot shows a web browser window with multiple tabs open at the top. The active tab is https://gvpce-da-dev-ed.lightning.force.com/lightning/o/Billing_Process__c/list?filterName=_Recent. The page displays a 'Recently Viewed' list for 'Billing Process'. The list is currently empty, showing the message: 'You haven't viewed any Billing Process recently. Try switching list views.' The interface includes a search bar, a toolbar with buttons for 'New', 'Import', and 'Assign Label', and various navigation and filtering options.

LAPTOP RENTALS

Billing Process

Recently Viewed

You haven't viewed any Billing Process recently.
Try switching list views.

https://gvpce-da-dev-ed.lightning.force.com/lightning/o/Billing_Process__c/home

2. Creating Tabs

A **tab** is a user interface component that helps users organize, access, and manage records of different **objects** within the platform. Salesforce objects represent different types of data, such as Accounts, Contacts, Opportunities, or CustomObjects, and each object has its own tab. Here's a more detailed explanation of what a tab is and how it functions.

2.1 Creating Total Laptops Tab:

i. To create a Tab:

1. Goto setup page >> type Tabs in 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.

ii. Creating Remaining tabs:

1. Now create the Tabs for the remaining Objects, they are "consumer,Laptop

Booking,Billing process”.

2. Follow the same steps as 2.1 .

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Action	Label	Tab Style	Description
Edit Del	Activities	Desk	created to setup with student activity(junction object)
Edit Del	Activities	Appliance	This tab is related to Hotel Reservation App
Edit Del	Categories	Chromo phone	
Edit Del	Guidelines	Joined	
Edit Del	Events	Appliance	This tab is related to College Management System
Edit Del	IMSS	Phone	
Edit Del	Order_Details	Chromo	
Edit Del	Order	Desk	
Edit Del	Order	Computer	
Edit Del	Order	Desk	
Edit Del	Order	Highway Signs	This tab is related to Hotel Reservation App
Edit Del	Order	Highway Sign	This tab is related to Hotel Reservation App
Edit Del	Order	Appliance	
Edit Del	Order	Smart	This tab is related to College Management System

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Action	Label	Tab Style	Description
Edit Del	Billing_Process	Shopping Cart	
Edit Del	consumer	People	
Edit Del	Laptop Bookings	Presenter	
Edit Del	Total Laptops	Laptop	

Web Tabs

No Web Tabs have been defined

Visualforce Tabs

New What is This?

3. Create Lightning App

To Create a Lightning app page:

1. Goto setup page >> search “app manager” in quick nd >> select “app manager” >> click on New lightning App.
2. 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.
3. Upload a photo that is related to your app.
4. To Add Navigation Items:
Select the items (Total Laptops, consumer, Laptop Booking, Billing Process) from the searchbar and move it using the arrow button >> Next.

The screenshot shows the Salesforce App Manager interface. At the top, there are three search bars: 'Q app manager', 'A Apps', and 'devManager'. A red arrow points to the first search bar. Below the search bars is a section titled 'Lightning Experience App Manager' with a sub-section 'Clone App(Beta)'. A red arrow points to the 'Clone App(Beta)' link. On the right side of this section are two buttons: 'New Lightning App' and 'New Connected App', with a red arrow pointing to the 'New Lightning App' button. The main area displays a table of existing apps with 35 items. The columns are 'App Name', 'Developer Name', 'Description', 'Last Modified...', 'App Type', and various edit and delete icons. The table includes entries like 'All Tabs', 'Analytics Studio', 'App Launcher', 'Bolt Solutions', 'Chatter Desktop', 'Chatter Mobile for BlackBerry', 'College Management System', 'Community', 'Content', and 'Data Manager'. The 'App Type' column shows values like 'Classic', 'Connected (Varaged)', 'Lightning', and 'Connected (Varaged)'.

App Name	Developer Name	Description	Last Modified...	App Type
All Tabs	AlTabster		04/12/2022, 10:19 am	Classic
Analytics Studio	insights	Build CRM Analytics dashboards and apps	04/12/2022, 10:19 am	Classic
App Launcher	AppLauncher	App Launcher tabs	04/12/2022, 10:19 am	Classic
Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry	04/12/2022, 10:19 am	Lightning
Chatter Desktop	Chatter/Desktop	Chatter Desktop is an Adobe AIR-based desktop application that lets Chatter users stay connected...	28/12/2022, 4:04 pm	Connected (Varaged)
Chatter Mobile for BlackBerry	Chatter_for_BBerry	The Salesforce.com Chatter Mobile app lets you access Chatter data on the go. Use it to view feed...	28/12/2022, 4:05 pm	Connected (Varaged)
College Management System	Nadeem	demo app	08/12/2022, 4:16 pm	Lightning
Community	Community	Salesforce CRM Communities	04/12/2022, 10:19 am	Classic
Content	Content	Salesforce CRM Content	04/12/2022, 10:19 am	Classic
Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	04/12/2022, 10:19 am	Lightning

5. To Add User Profiles:

Search profiles (Systemadministrator) in the search bar >> clickon the arrow button >> save & finish.

The screenshot shows the 'App Settings' section of the Lightning App Builder. On the left, under 'Navigation Items', there is a list containing 'User Profiles'. The main area is titled 'Navigation Items' and contains two panels: 'Available Items' and 'Selected Items'. The 'Available Items' panel lists various navigation items with icons: Accounts, All Sites, Alternative Payment Methods, Analytics, App Launcher, Appointment Categories, Appointment Invitations, Approval Requests, and Accrual Action Courses. The 'Selected Items' panel lists four items: 'Total Laptops', 'Laptop Bookings', 'consumer', and 'Billing Process'. There are arrows between the two panels for moving items between them.

4. Fields

Fields are fundamental building blocks of objects. They store individual pieces of data in a record and define the data type, behavior, and purpose of that data. Fields are associated with both **standard** and**custom objects**. Fields in Salesforce are data containers within objects that store specific pieces of information, such as text, numbers, or dates.

Steps to Create Field For a Object:

1. Go to setup >> click on ObjectManager >> type object name in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data Type and fill details like label, name,etc.
4. Click on Next >> Next >> Save and new.

4.1 Creating The FieldsIn Consumer Object

The screenshot shows the Salesforce Setup interface with the following details:

- Header:** Search Setup, Setup, Home, Object Manager.
- Breadcrumbs:** SETUP > OBJECT MANAGER consumer
- Left Sidebar:** Details, Fields & Relationships (selected), 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.
- Table:** Fields & Relationships (8 Items, Sorted by Field Label)

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		

Create Phone numberfield:

1. Select Data Type as a “Phone” and click on next.
 2. Field Label: Phone number
 3. Field Name : gets auto generated
 4. Click the required option checkbox.
 - Create Email field:
1. Select Data Type as a “Email” and click on next.
 2. Field Label: Email
 3. Field Name : gets auto generated

Create Address field:

1. Select Data Type as a “Text Area” and click on next.
2. Field Label: Address
3. Field Name : gets auto generated

Create Consumer status field:

1. Select Data Type as a “Picklist” and click on next.
2. Field Label: consumer Status
3. Value - Select enter values with each value separated by a new line
4. Select required Field Name :It's gets auto generated

4.2 Creating The Fields In LaptopBookings Object

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes tabs for Setup, Home, and Object Manager. The main title is "Laptop Bookings". On the left, there's a sidebar with various setup categories like Page Layouts, Lightning Record Pages, Buttons, etc. The main content area is titled "Fields & Relationships" and displays a table of fields. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are:

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	CreatedBy	Lookup(User)		
Email	Email_c	Email		
how many months	how_many_months_c	Picklist		
Laptop Bookings	Name	Text(80)		✓
Laptop names	Laptop_names_c	Picklist		

Create Laptop Namesfield:

1. Select Data Type as a “Picklist” and click on next.
2. Field Label: Laptop Names
3. Picklist values are: 1.Dell 2.Acer 3.Hp 4.Mac
4. Field Name : gets auto generated

To create Core Type field:

1. Select Data Type as a “Picklist” and click on next.
2. Field Label: Core Type
3. Picklist values are: core i3, core i5, core i7, Bionic chip
4. Select Required

To create field dependency in the Laptop Booking Object:

1. Click field dependency and next.

2. Select Controlling Field as Laptop Names and Dependent Field as Core Type
3. Click the include value for dell-core i3,i5,i7 and for acer i3,i5,i7 and for hp i3,i5,i7 and also for mac bionic chip include the values for it.

4.3 To Create a Fields & Relationship to an Laptop Booking and Total Laptops Objects

1. Create "Master-detail Relationship" in Laptop Booking Object:
 - a. Go to setup >> click on Object Manager >> type object name(Laptop Booking) in the search bar >> click on the object.
 - b. Now click on “Fields & Relationships” >> New Select Data Type as a “Master-Detail Relationship” and Clickon Next.
 - c. Click on the Related to drop down and Select the “consumer” object

and clickon Next

 - d. Fill the Above as following: Change the Field Label:Consumer
 - Field Name :It's gets auto generated
 - e. Click on Next >>Next >> Save and new.
2. Create "Currency" field
 - a. Field Label:Amount
 - b. Length: (18,0)

- c. Field Name :It's gets auto generated
 - d. Click on Next >>Next >> Save and new
3. Create relationship to "Total Laptops" object
 - a. Select Laptop bookingobject in the object manager.
 - b. Now click on "Fields & Relationships" >>New
 - c. Select Data Type as a "Lookup Relationship" and Click on Next
 - d. Click on the Relatedto drop down and Selectthe "Total Laptops" object and click on Next
 - e. Change the FieldLabel: Total No Of Laptops
 - f. Field Name :It's gets auto generated
 - g. Click on Next >> Next >> Save and new.
4. Create Email fieldin Laptop BookingsObject
5. Create "Rollup Summary" in Total Laptops Object
 - a. Field Label: Laptops delivered
 - b. Field Name :It's gets auto generated
6. Select the Laptop Bookings in the Summarized Object
7. Select the count Radio button in the select Roll-up Type

8. Create "Laptops Available" field:
 - a. Field Label: Laptops Available
 - b. FieldName : It's gets auto generated
 - c. Select the Formula Return Type as "Number"
 - d. Select the Decimal placesas "0" and Click on Next
 - e. Click on the AdvancedFormula and Enter the value in

formulabox "50 - Total_no_of_laptops_
r.Laptops_delivered_c"

9. Create "how many months" field in Laptop Bookings object:
 - a. Label: how many months
 - b. Picklist values are: 1, 2, 3, 4, 5

4.4 Creation of Fields & Relationship for Billing ProcessObject

1. Create relationship for consumer object:
 - a. Now click on “Fields& Relationships” >>New in Billing Process object
 - b. Select Data Type as a “Master-detail Relationship”
 - c. Click on Next Click on the Related to drop down and Select the consumer object and click on Next
 - d. Click on the Relatedto drop down and Select the consumerobject and click on Next
 - e. Change the Field Label:Name and clickon save and new
2. Create "Lookup Relationship" in Laptop Booking object
3. Create "Payment Mode" as picklist values (Cash, Check, Credit card, Debit card, UPI, Phonepe, Gpay, Paytm)
4. Create a Cross objectformula Field in billing processObject:
 - a. Select Data Type as a “Formula” and Click on Next
 - b. Enter the Field label:Amount

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes tabs for Setup, Home, and Object Manager. The main title is "Billing Process". On the left, there's a sidebar with links like 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, and List View Button Layout. The main content area is titled "Fields & Relationships" and displays a table with the following data:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount_c	Formula (Currency)		▼
Billing ProcessName	Name	Text(80)		✓
Created By	CreatedByld	Lookup(User)		▼
Laptop Bookings	Laptop_Bookings_c	Lookup(Laptop Bookings)		✓
Last Modified By	LastModifiedByld	Lookup(User)		▼
Name	Name_c	Master-Detail(consumer)		✓
Payment Mode	Payment_Mode_c	Picklist		▼

c. formula: "Laptop_Booking__r.Amount__c"

4.5 Creating the field in Total Laptops object

1. Go to setup >>click on Object Manager >>type object name(Total Laptops) in search bar >> click on the object.
2. Now click on “Fields& Relationships” >>New Select Data type as a “Formula” and Click on Next
3. Field Label:Laptops Available FieldName : It's gets auto generated Select the Formula Return Type as “Number”

The screenshot shows the Salesforce Object Manager interface. The URL in the browser is <https://gvpcda-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01IWU000002Ncxu/FieldsAndRelationships/view>. The page title is "Total Laptops". The left sidebar under "Fields & Relationships" includes links for Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main content area displays the "Fields & Relationships" section with the following data:

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	Text(80)	✓	▼

5. ValidationRules

Validationrules are appliedwhen 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 triggersan error messageand prevents the user from saving the record until the issues are resolved.

1. Go to the setup page >> click on object manager >>From drop down click edit for consumer object.
2. Clickon the validation rule >>click New.

The screenshot shows the Salesforce Lightning Experience interface. The URL in the browser is `gvpce-da-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01IWU000002Ngi9/ValidationRules/view`. The top navigation bar includes links for Setup, Home, and Object Manager. The main content area is titled "SETUP > OBJECT MANAGER consumer". On the left, a sidebar lists various object configuration options like Details, Fields & Relationships, Page Layouts, etc. The right side displays a table titled "Validation Rules" with one item listed:

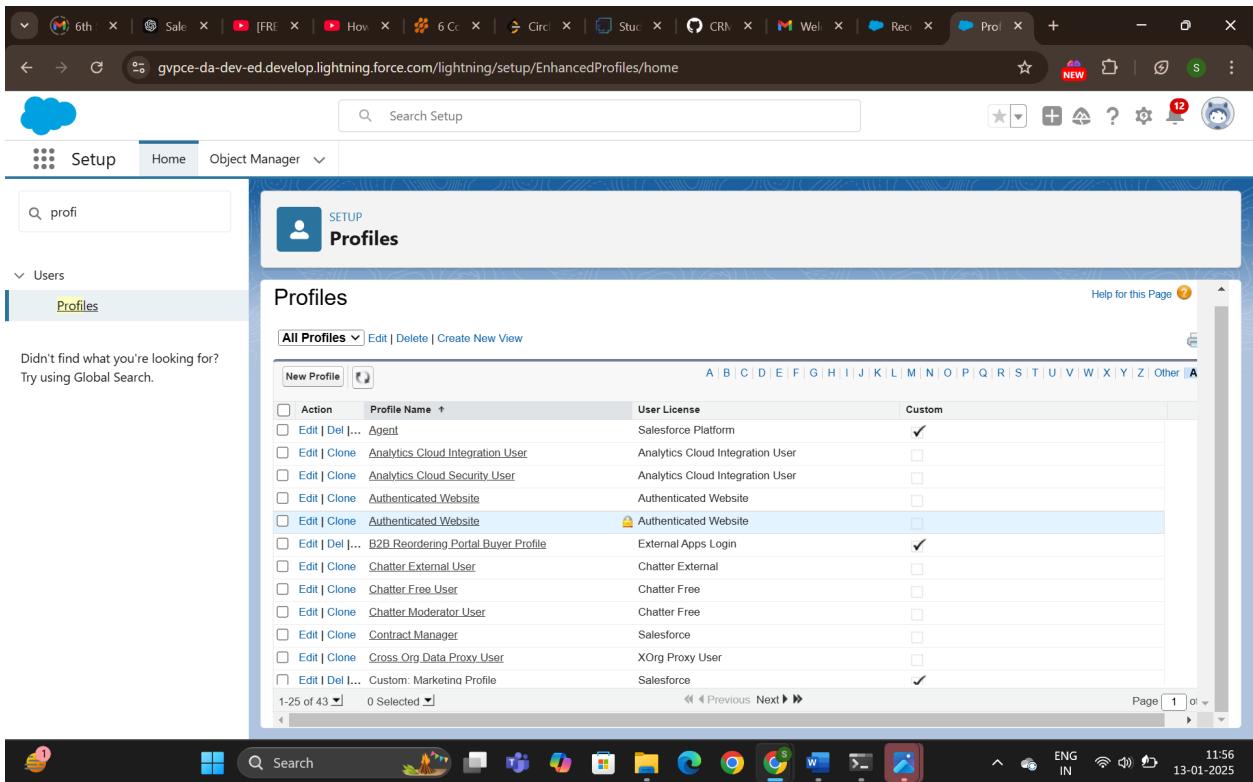
RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Phonenumberoremailblankrule	Top of Page	Please fill Phone Number and Email	✓	Sai Reshma Ponnaganti, 09/01/2025, 10:38 am

The bottom of the screen shows the Windows taskbar with various application icons and system status indicators.

3. Enter the Rule name as “Phonenumberoremailblankrule”.
4. Enter the description as “phone number and email number should not be blank”.
5. Enter the formulaas “**OR(ISBLANK(phone_number__c), ISBLANK(email__c))**” and check the syntax.

6. 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.

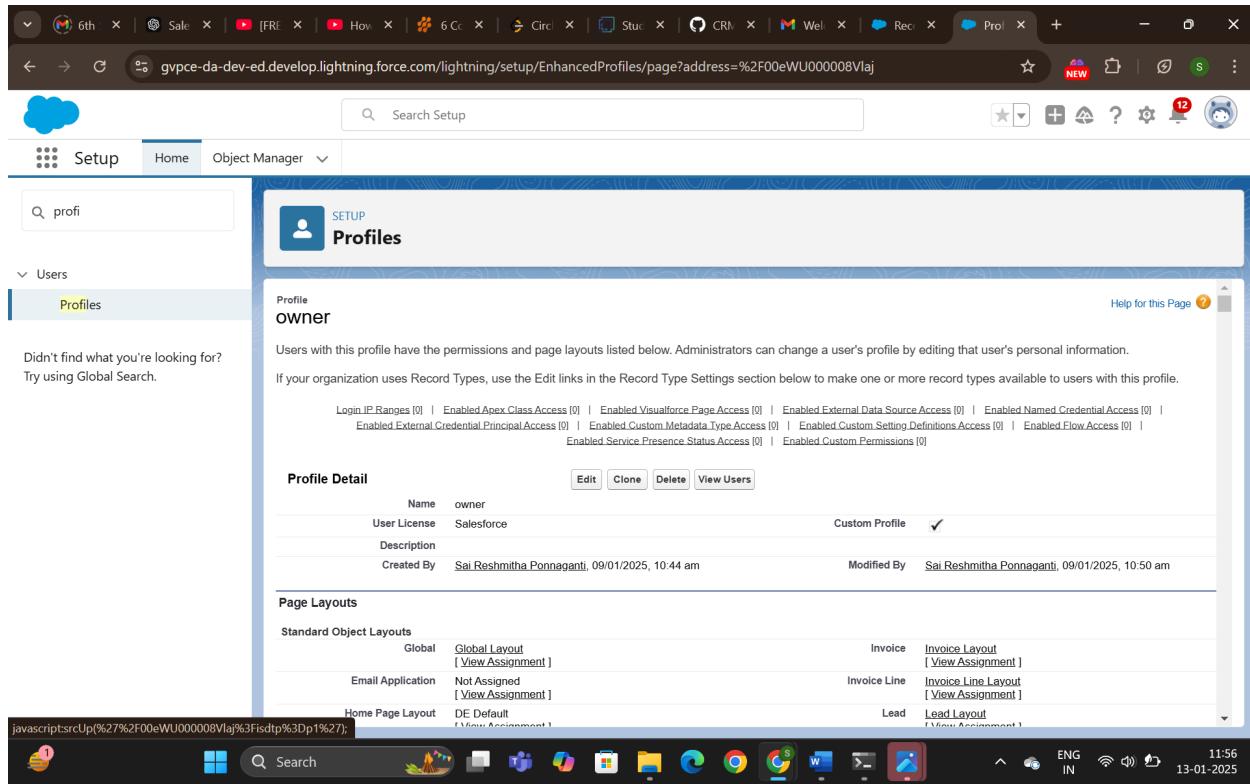


The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. The left sidebar has 'Users' expanded, with 'Profiles' highlighted. A search bar at the top left contains 'prof'. The main area displays a table of profiles:

Action	Profile Name	User License	Custom
Edit Del ...	Agent	Salesforce Platform	<input checked="" type="checkbox"/>
Edit Clone	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
Edit Clone	Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
Edit Del ...	B2B Reordering Portal Buyer Profile	External Apps Login	<input checked="" type="checkbox"/>
Edit Clone	Chatter External User	Chatter External	<input type="checkbox"/>
Edit Clone	Chatter Free User	Chatter Free	<input type="checkbox"/>
Edit Clone	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
Edit Clone	Contract Manager	Salesforce	<input type="checkbox"/>
Edit Clone	Cross_Org Data Proxy User	XOrg Proxy User	<input type="checkbox"/>
Edit Del ...	Custom: Marketing Profile	Salesforce	<input checked="" type="checkbox"/>

6.1 Create Owner Profile

- Go to setup>> type profiles in quick find box
>> click on profiles>> clone the desired profile (Standard User) >> enter profile name (owner) >> Save.



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

6.2 Create Agent Profile

- Go to setup>> type profiles in quick find box >> click on profiles>> clone the desired profile (Standard PlatformUser) >> enter profile name (Agent) >> Save.
- Scroll down to Custom Object Permissions

and Given access permissions for Total Laptops, consumer , LaptopBookings and Billing Process objects as mentioned in the below diagram.

The screenshot shows the Salesforce Setup interface with the URL `gvpcda-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00eWU000008Vm5N`. The page displays the Agent profile details. The profile name is Agent, user license is Salesforce Platform, and it is a Custom Profile. The page also lists various permissions and page layouts assigned to the profile.

Profile Detail

Name	Agent
User License	Salesforce Platform
Description	
Created By	Sai Reshma Ponnaganti, 09/01/2025, 10:53 am
Modified By	Sai Reshma Ponnaganti, 09/01/2025, 10:55 am

Page Layouts

Standard Object Layouts	Global	Fulfillment Order Item Tax	Fulfillment Order Item Tax Layout
Email Application	Not Assigned [View Assignment]	Fulfillment Order Product	Fulfillment Order Product Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Idea	Varies by Record Type [View Assignment]

7. Roles and Hierarchy

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.

Steps:

1. Goto 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.



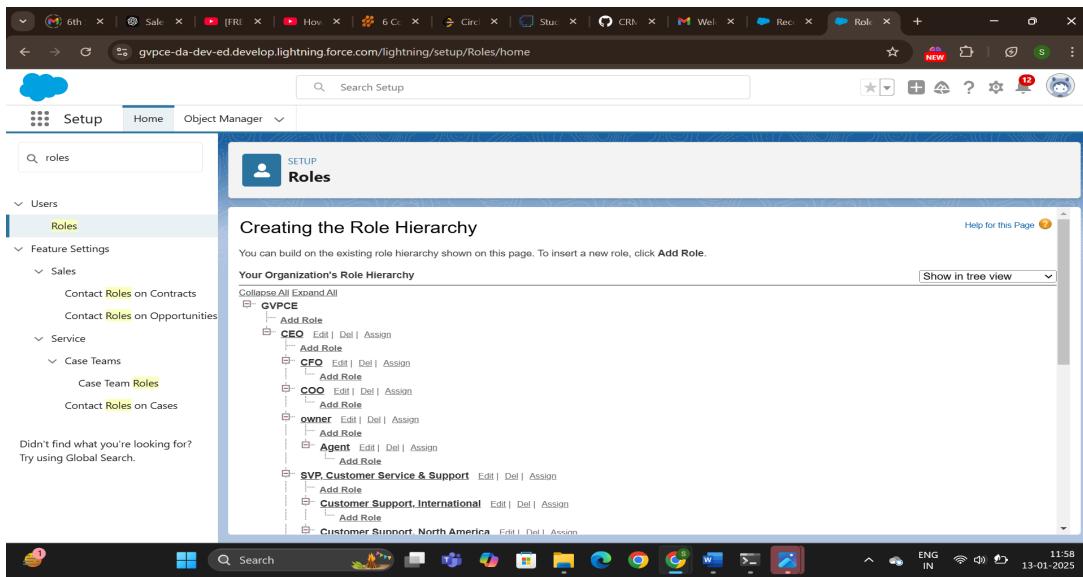
7.1 Create Owner Role

- i. Give Label as "owner" and Role name gets auto populated. Then click on Save.

Role Edit	New Role	Help for this Page
Role Edit		
Label	owner	
Role Name	owner	
This role reports to	CEO	
Role Name as displayed on reports		
<input type="button" value="Save"/> <input type="button" value="Save & New"/> <input type="button" value="Cancel"/>		

7.2 Create Agent Role

- i. Go to quick find - Search for Roles - click on set up roles.
- ii. Click plus on CEO role, and click add role underowner.
- iii. Give Label as “Agent” and Role name gets auto populated. Then click on Save.



8. 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**.

Create User

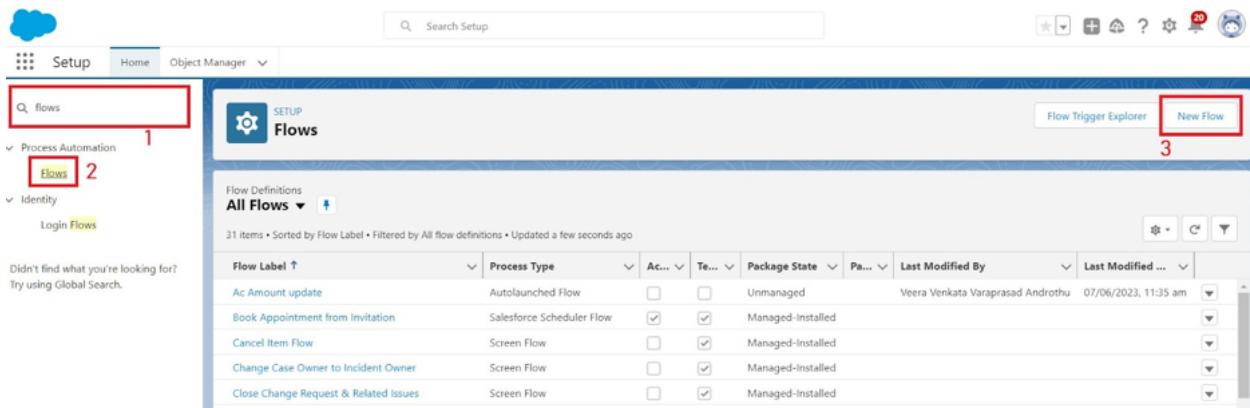
1. Go to setup - type users in quick find box - select users -click New user.
2. Fillin the fields
 - a. First Name : vicky
 - b. Last Name : y
 - c. Alias : Give a Alias Name
 - d. Email id : Give your PersonalEmail id
 - e. Username : Username shouldbe in this form: text@text.text
 - f. Nick Name : Give a Nickname
 - g. User license: Salesforce
3. If the user is
 - a. "owner": Set the profiles and role field to owner
 - b. "Agent": Set the profiles and role field to Agent

9. Flows

"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. 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.

9.1 Create a Flow on dell laptop

- Go to setup >> type Flow in quick find box >>
Click on the Flow and Select the New Flow.



- Select the Record-triggered flow and Click on Create.
- Select the Object as a Laptop Booking in the Drop down list.
- Select the Trigger Flow when: "A record is Created or Updated".

- Select the Optimize the flow for: “Actions and Related Records”and Click on Done.

Configure Start

Select Object

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

* Object

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.

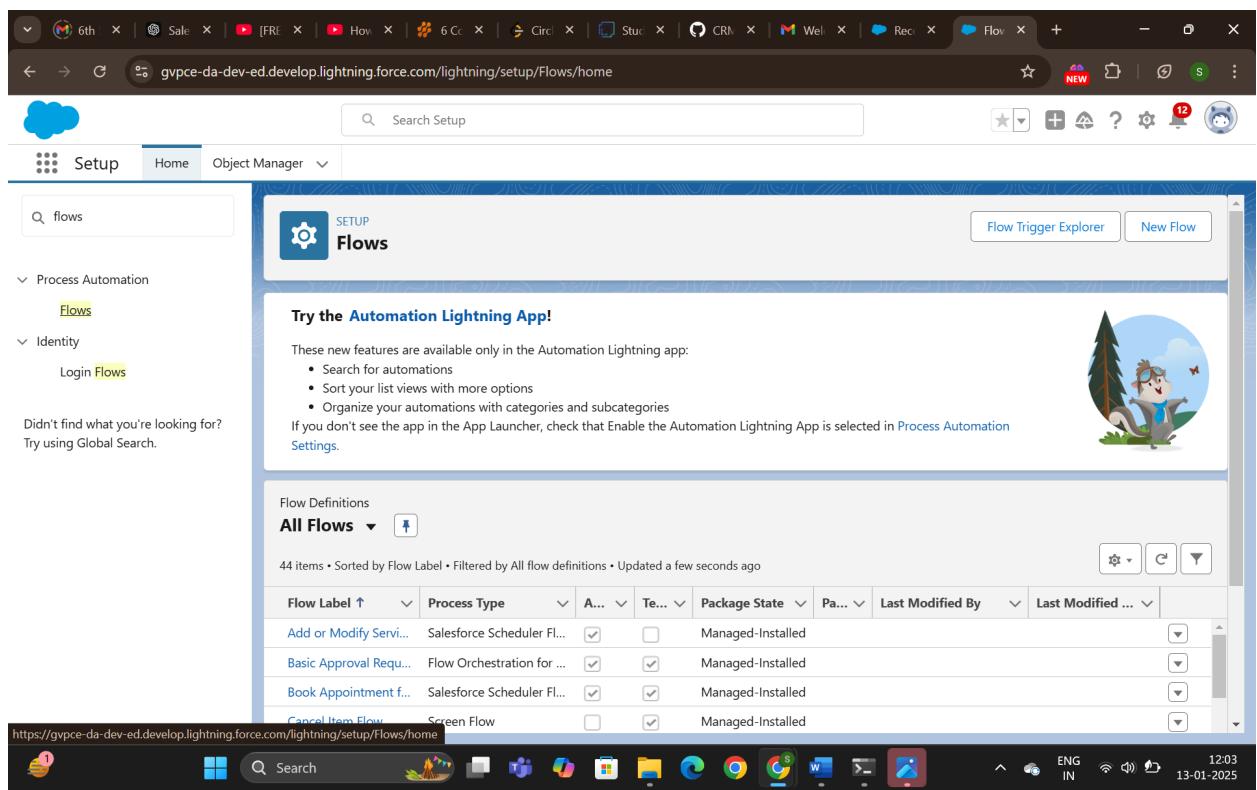
[Cancel](#) [Done](#)

1. Under the Record-triggered Flow Click on “+” Symbol and In the Drop down List select the “Decision Element”.
2. Enter the Details Label: Field should be Update, API name: Gets Automatically Generated.
3. Enter the Outcome DetailsLabel: dell , Outcome API name: Gets Automatically Generated.
 - a. Resource: Select \$Record.Laptop_name_c.
 - b. Operator: Select Equals.
 - c. Value: Select dell Add the same outcome order to acer , hp, mac.
 - d. Rename Default outcome as False
 - e. Click done.
4. Beside dell there is a symbol ‘+’ click on that. Again select decision

5. Enter the Details Label: Field should Update(any one you want), API name: Gets Automatically Generated.
6. Select the Outcome DetailsLabel: dell core i3 , Outcome API name:

Gets Automatically Generated. Resource: Select
`!$Record.core_type_c}`. Operator: Select Equals. Value:
 Select core i3.

7. Add the dell i5 and dell i7 outcome details in the similar way



The screenshot shows the Salesforce Setup Flows page. The left sidebar has categories like Process Automation (Flows selected) and Identity (Login Flows). A search bar at the top right says "Search Setup". The main area is titled "SETUP Flows" and features a "Try the Automation Lightning App!" section with a cartoon character. Below it is a table of "Flow Definitions" with columns: Flow Label, Process Type, A..., Te..., Package State, Pa..., Last Modified By, and Last Modified The table lists several flows, all of which are "Managed-Installed". The status bar at the bottom shows the URL "https://gvpce-da-dev-ed.develop.lightning.force.com/lightning/setup/Flows/home", the date "13-01-2025", and the time "12:03".

Flow Label	Process Type	A...	Te...	Package State	Pa...	Last Modified By	Last Modified ...
Add or Modify Servi...	Salesforce Scheduler Fl...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed			
Basic Approval Requ...	Flow Orchestration for ...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Book Appointment f...	Salesforce Scheduler Fl...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Cancel Item Flow	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			

8. Go to the flow page select '+' after core i3 then again select the decision.
9. Enter the Details Label: months selected, API name: Gets Automatically Generated.
10. Enter the Outcome DetailsLabel: dell 1(i3) , Outcome API name: Gets Automatically Generated.

- a. Resource: Select Record.how many months
 - b. Operator: Select Equals
 - c. Value: 1
11. Similarly Enter the OutcomeDetails as
- a. dell 2(i3) -> resource: Record.how many months , value: 2
 - b. dell 3(i3) -> resource: Record.how many months , value: 3
 - c. dell 4(i3) -> resource: Record.how many months , value: 4
 - d. dell 5(i3) -> resource: Record.how many months , value: 5
12. Enter the Details Label: one month of dell i3 rate , API name: Gets AutomaticallyGenerated. Enter labelname in a similar way for other update records.
13. Field:- Amount_c , value:- for dell 1(i3)-1000, dell 2(i3)-2000, dell 3(i3)-3000, dell 4(i3)-4000, dell 5(i3)-5000. Follow all these finally and update the Amount field value based on the number of months.
14. Perform these steps for core i5 and i7.
15. Click done.

9.2 Create A Flow on Acer Laptop

- Enter the Details Label:Acer core type selection, API name: Gets Automatically Generated.
 - Select the Outcome DetailsLabel: acer core i3 , Outcome API name: Gets Automatically Generated.
1. Resource: Select Record.core type.

2. Operator: Select Equals.
3. Value: Selectcore i3.
 - Similarly create outcomes for acer core i5 and acer core i7 also.

Edit Decision

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		
acer core i3	* Label acer core i3	* Outcome API Name acer_core_i3	Delete Outcome
acer core i5			
acer core i7			
Default Outcome			
	Condition Requirements to Execute Outcome All Conditions Are Met (AND)		
	Resource \$Record > core type	Operator Equals	Value core i3
	+ Add Condition		
	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		
	Cancel Done		

- Create OutcomeDetails Labels: acer 1(i3), acer 2(i3), acer 3(i3), acer 4(i3), acer 5(i3)

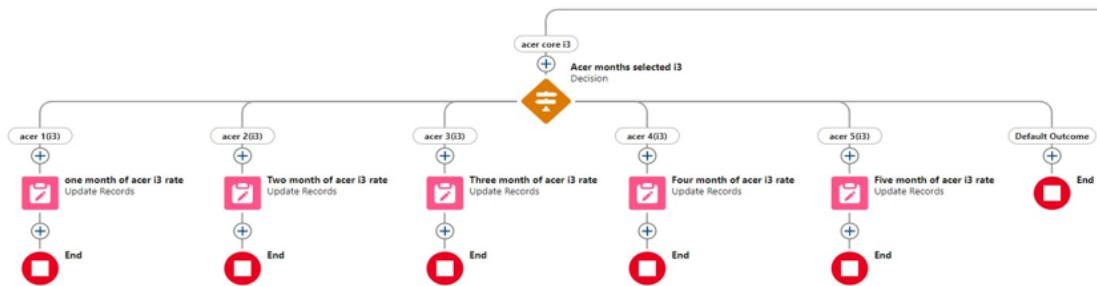
Edit Decision

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		
acer months selected	* Label acer months selected	* API Name acer_months_selected	Delete Outcome
Description			
acer 1(i3)	* Label acer 1(i3)	* Outcome API Name acer_1_i3	
acer 2(i3)			
acer 3(i3)			
acer 4(i3)			
acer 5(i3)	Condition Requirements to Execute Outcome All Conditions Are Met (AND)	Resource \$Record > how many months	Operator Equals
			Value 1
	Cancel Done		

- Enter the Details Label: one month of acer i3 rate , API name: Gets Automatically Generated.

- 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.
 - Perform these steps for core i5 and i7.
 - Click done.
-



9.3 Create A Flow On Hp Laptop

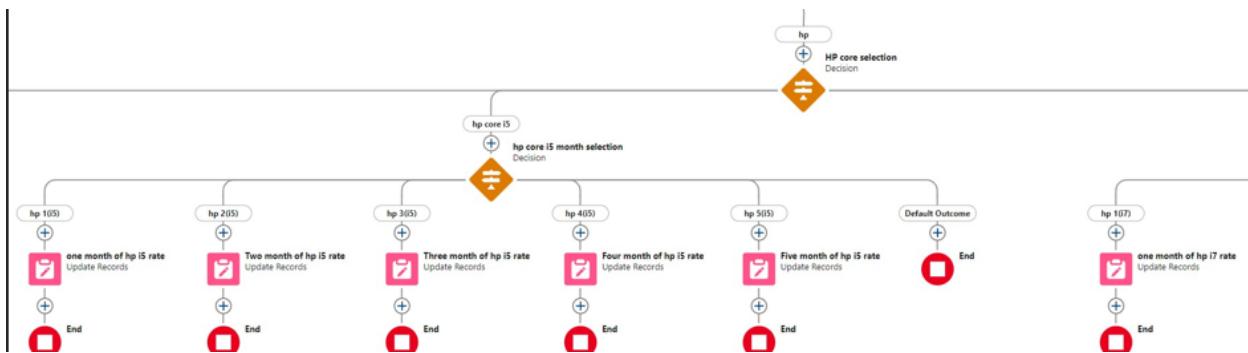
1. Go to flow page
2. Beside hp there is a symbol '+' click on that.
3. Enter the Details Label: HP core selection, API name: Gets Automatically Generated.
4. Select the Outcome DetailsLabel: hp core i3 , Outcome API name: Gets Automatically Generated.

Edit Decision

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	
hp core i3	*Label: hp core i3	*Outcome API Name: hp_core_i3
hp core i5		
hp core i7		
Condition Requirements to Execute Outcome All Conditions Are Met (AND)		
Resource: \$Record > core type Operator: Equals Value: core i3 + Add Condition		
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		
		Delete Outcome
		Cancel Done

1. Resource: Select Record.core type.
2. Operator: Select Equals.
3. Value: Select hp i3.
5. Similarly create outcomes for hp core i5 and hp core i7 also.



6. Beside hp there is a symbol '+' click on that.
7. Enter the Details Label: hp core i3 month selection , API name: Gets Automatically Generated. Enter the Outcome Details Label: hp 1(i3), Outcome API name: Gets Automatically Generated.
1. Resource: Select Record.how many months.

2. Operator: Select Equals.
3. Value: 1.
8. Similarly Create Outcome DetailsLabels: hp 2(i3), hp 3(i3), hp 4(i3), hp 5(i3).
9. 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.
10. Perform these steps for othercore types.
11. Click done.

9.4 Creating A Flow on Mac laptop

- Beside mac there is a symbol '+' click on that.
- Enter the Details Label: mac should be Updated, API name: Gets Automatically Generated.
- Select the Outcome DetailsLabel: mac laptop, Outcome API name: Gets Automatically Generated.

Edit Decision

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	Delete Outcome
mac bionic chip(1)	*Label: mac bionic chip(1) *Outcome API Name: mac_bionic_chip_1 Condition Requirements to Execute Outcome: All Conditions Are Met (AND)	<input type="button" value="Delete Outcome"/>
mac bionic chip(2)		
mac bionic chip(3)		
mac bionic chip(4)		
mac bionic chip(5)		
Default Outcome		

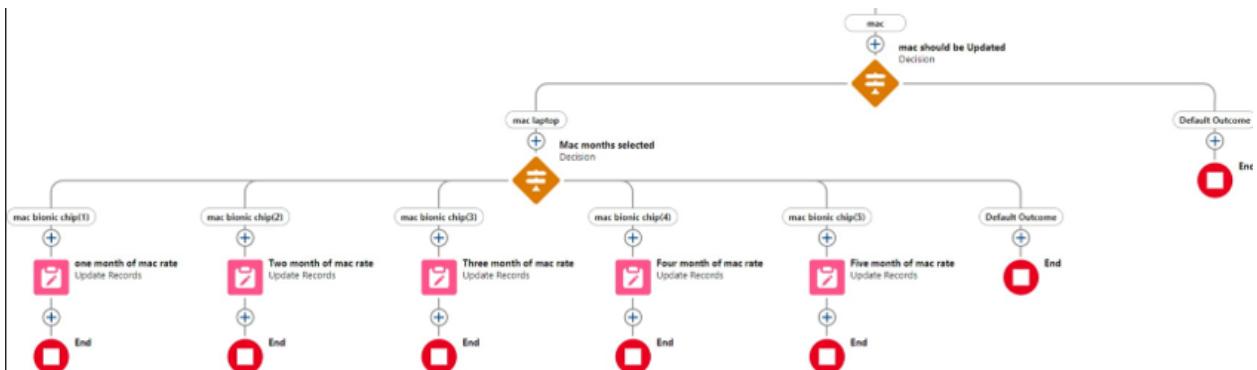
Resource: \$Record > how many months Operator: Equals Value: 1

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

1. Resource: Select Record.core type.
2. Operator: Select Equals.
3. Value: Select Bionic Chip.

- Enter the Details Label:Macmonths selected , API name: Gets Automatically Generated.
 - Enter the Outcome DetailsLabel: mac bionicchip(1) , OutcomeAPI name: Gets Automatically Generated.
1. Resource: Select Record.how many months.
 2. Operator: Select Equals.
 3. Value: 1.
 - Similarly CreateOutcome Details Labels:mac bionic chip(2),mac bionic chip(3), mac bionic chip(4), mac bionic chip(5)
 - Enter the Details Label:one month of mac rate , API name: Gets Automatically Generated.
 - 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 finallyand click done.



10.Apex Trigger and Handler Class

Apex

Apex is a strongly typed, object-oriented programming language that allows developers to **execute flow** and **transaction control statements** on the Lightning platform serverin conjunction with calls to the LightningPlatform API. It is as similar as java i.e, it also supports OOP(Object oriented programming) like Classes, objects, methods.

Trigger

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.

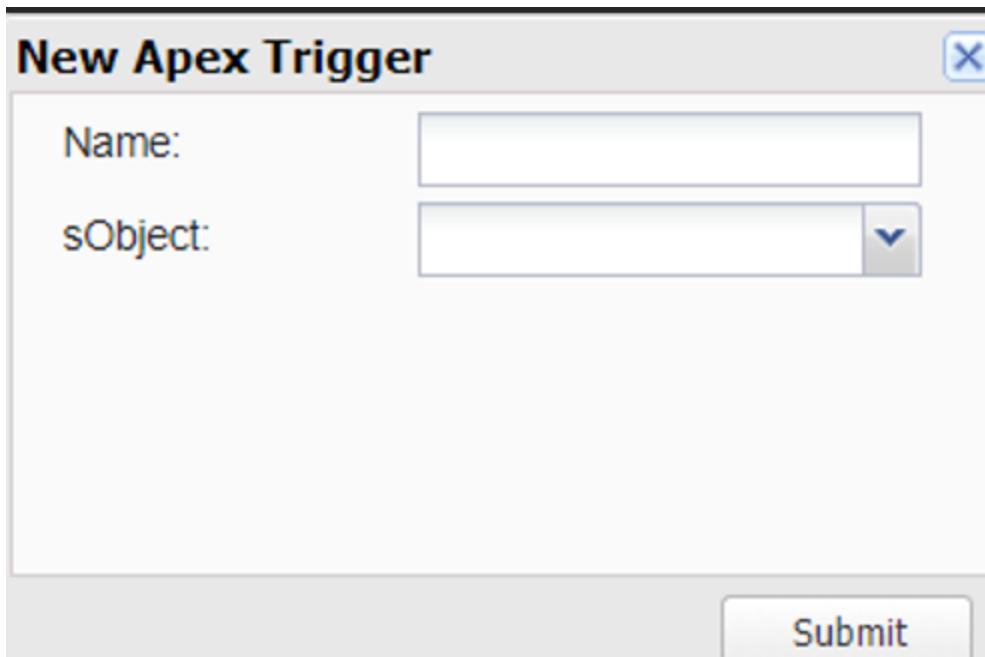
There are two Salesforce Apex trigger types:

1. Before Triggers
2. Aftertriggers

Create a new trigger:

- a. Click on developer console and you will be navigated to a new console window.
- b. Click on the File menu in the toolbar, and click on new Trigger.

- c. Enter the triggername and the object to be triggered.



10.1 To Create LaptopBooking Trigger

Purpose: This trigger is called whenever the particular record's sum exceeds the threshold i.e minimum business requirement value. Then the code in the trigger will get executed.

Trigger Code:

A screenshot of the Salesforce Apex code editor. The current file is 'LaptopBooking.apxc'. The code is as follows:

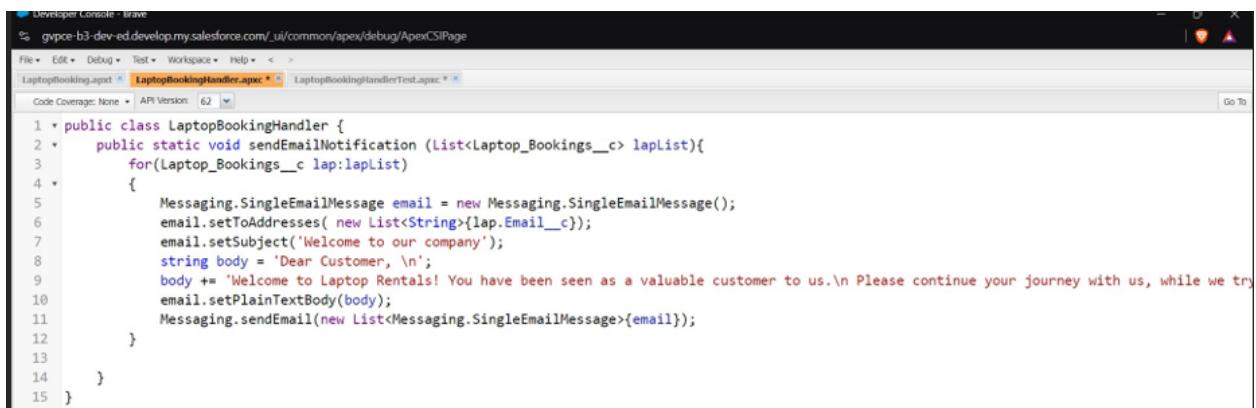
```
trigger LaptopBooking on Laptop_Bookings__c (After insert,after update) {
    if(trigger.isAfter && (trigger.isInsert || trigger.isupdate)){
        LaptopBookingHandler.sendEmailNotification(trigger.new);
    }
}
```

The code editor shows syntax highlighting for keywords like 'trigger', 'if', and 'sendEmailNotification'. There are three tabs at the top: 'LaptopBooking.apxc', 'LaptopBookingHandler.apxc', and 'LaptopBookingHandlerTest.apxc'. The status bar at the bottom indicates 'API Version 62'.

10.2 Create Handler Class

Purpose: In LaptopBookingHandler class, sendEmailNotification method is defined which automates sending email with the details like laptop type, core type, amount when a customer books laptops

Code:



```
Developer Console - brave
gs gypce-b3-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSPage
File • Edit • Debug • Test • Workspace • Help • < >
LaptopBooking.apc LaptopBookingHandler.apc * LaptopBookingHandlerTest.apc *
Code Coverage: None • API Version: 62 Go To
1 * public class LaptopBookingHandler {
2 *     public static void sendEmailNotification (List<Laptop_Bookings__c> lapList){
3 *         for(Laptop_Bookings__c lap:lapList)
4 *         {
5 *             Messaging.SingleEmailMessage email = new Messaging.SingleEmailMessage();
6 *             email.setToAddresses( new List<String>{lap.Email__c});
7 *             email.setSubject('Welcome to our company');
8 *             string body = 'Dear Customer, \n';
9 *             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
10 *             email.setPlainTextBody(body);
11 *             Messaging.sendEmail(new List<Messaging.SingleEmailMessage>{email});
12 *         }
13 *     }
14 * }
15 }
```

11. Reports

Reports give you access to your Salesforce data. It displays it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics.

Types of Reports in Salesforce:

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

11.1 Create Report

- i. Go to the app "Laptop Rentals".
- ii. click on the reports tab and ClickNew Report.
- iii. Select report type from category and click on start report.
- iv. Create a simple tabular report
- v. Add fields from left pane, make sure that Amount field will be selected.
- vi. Click the Amount column drop down and select bucket list.

Edit Bucket Column

* Field	* Bucket Name
Amount	x types of versions

Range	Bucket
<= 900	basic
> 900 to 1500	intermediate
> 1,500 to 10000	high
> 10,000	very high

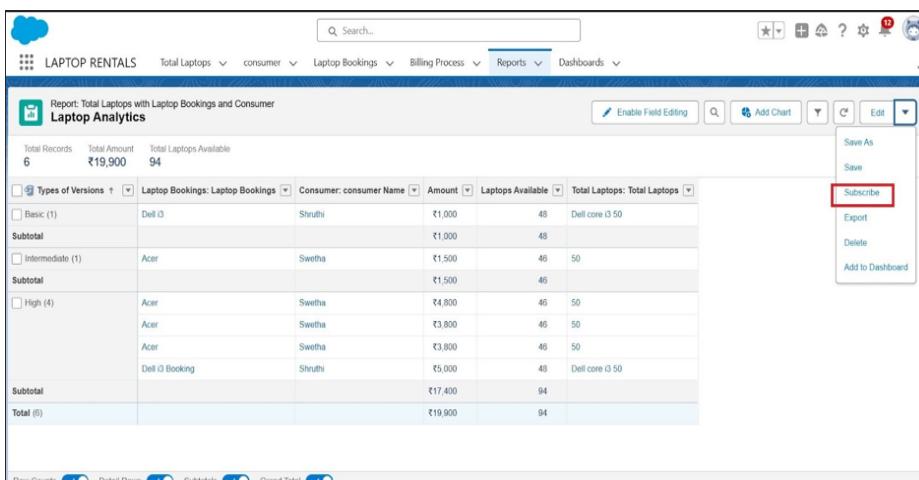
Treat empty Amount values in the report as zeros.

- vii. Select Types of versionin Group By Rows to create a summary report.
- viii. Click on Save & run it.

Report output:

11.2 Sharing Report To Owner

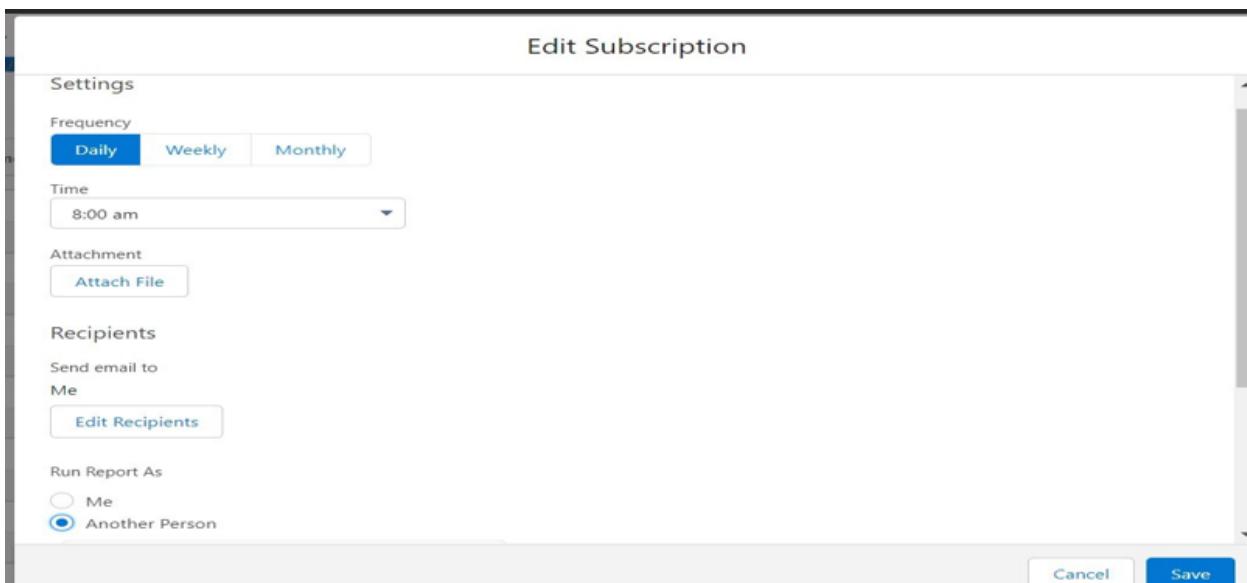
- i.Click edit drop down and select subscribe option



The screenshot shows a reporting tool with a top navigation bar including 'LAPTOP RENTALS', 'Total Laptops', 'consumer', 'Laptop Bookings', 'Billing Process', 'Reports', and 'Dashboards'. Below the navigation is a search bar and various toolbar icons. The main area displays a table titled 'Report: Total Laptops with Laptop Bookings and Consumer'. The table has columns for 'Total Records' (6), 'Total Amount' (₹19,900), and 'Total Laptops Available' (94). The table rows show booking details for different consumers like Shruthi and Swetha across various laptop models like Dell i3 and Acer. On the right side of the table, a context menu is open with options: 'Save As', 'Save', 'Subscribe' (which is highlighted with a red box), 'Export', 'Delete', and 'Add to Dashboard'. At the bottom of the interface, there are footer links for 'Create Records', 'Detail View', 'Grid View', 'Grand Total', and 'Print'.

Total Records	Total Amount	Total Laptops Available
6	₹19,900	94
<input type="checkbox"/> Types of Versions + <input type="button" value="Laptop Bookings: Laptop Bookings"/> <input type="button" value="Consumer: consumer Name"/> <input type="button" value="Amount"/> <input type="button" value="Laptops Available"/> <input type="button" value="Total Laptops: Total Laptops"/>		
<input type="checkbox"/> Basic (1) Dell i3 Shruthi ₹1,000 48 Dell core i3 50 Subtotal <input type="checkbox"/> Intermediate (1) Acer Swetha ₹1,500 48 50 Subtotal <input type="checkbox"/> High (4) Acer Swetha ₹4,800 46 50 Acer Swetha ₹3,800 46 50 Acer Swetha ₹3,800 46 50 Dell i3 Booking Shruthi ₹5,000 48 Dell core i3 50 Subtotal Total (6) ₹17,400 94		

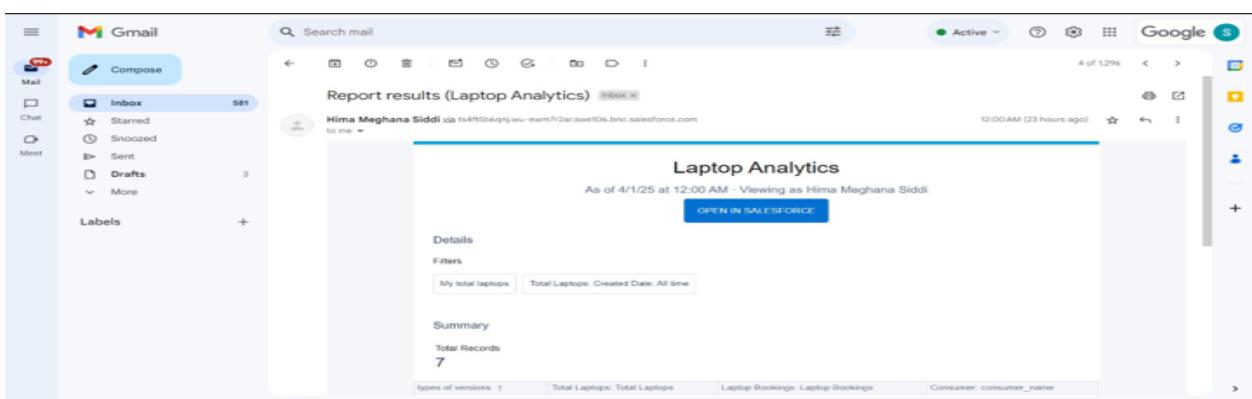
ii.Fill the details like frequency, time, mail to whom the report has to be sent.



iii.After selecting the run report as a “anotherperson” select your personal account or whom you want to send that mail to.

iv.Click save.

The report being sent to mail looks like:



12.Dashboards

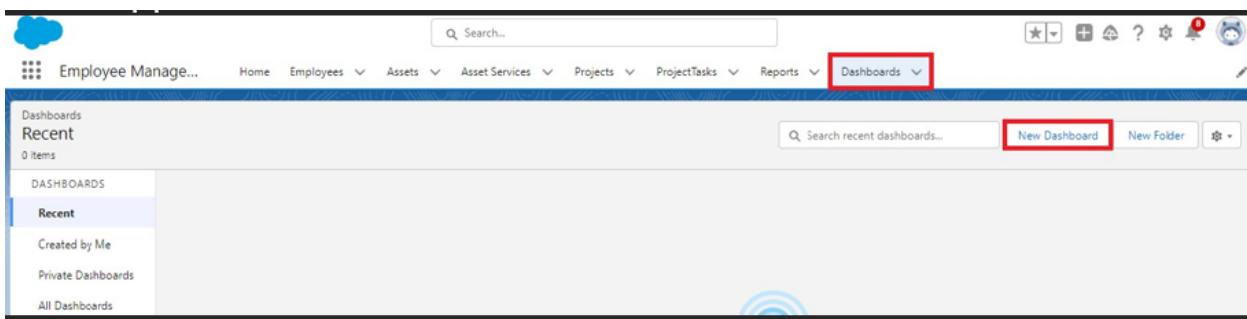
Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports. Use dashboards to help users **identify trends**, sort out quantities, and measure the impact of their activities.

12.1 Create Dashboard folder

- Click on the app launcher and search for the dashboard.
- Click on the dashboard tab.
- Click the new folder, give the folder label as “totalrent amount”.
- Folder unique names will be auto populated.
- Click save.

12.2 Create Dashboard

- Go to the app >> click on the Dashboards tabs.



- Give a Name and select the folder that was created, and click on create.

New Dashboard

* Name

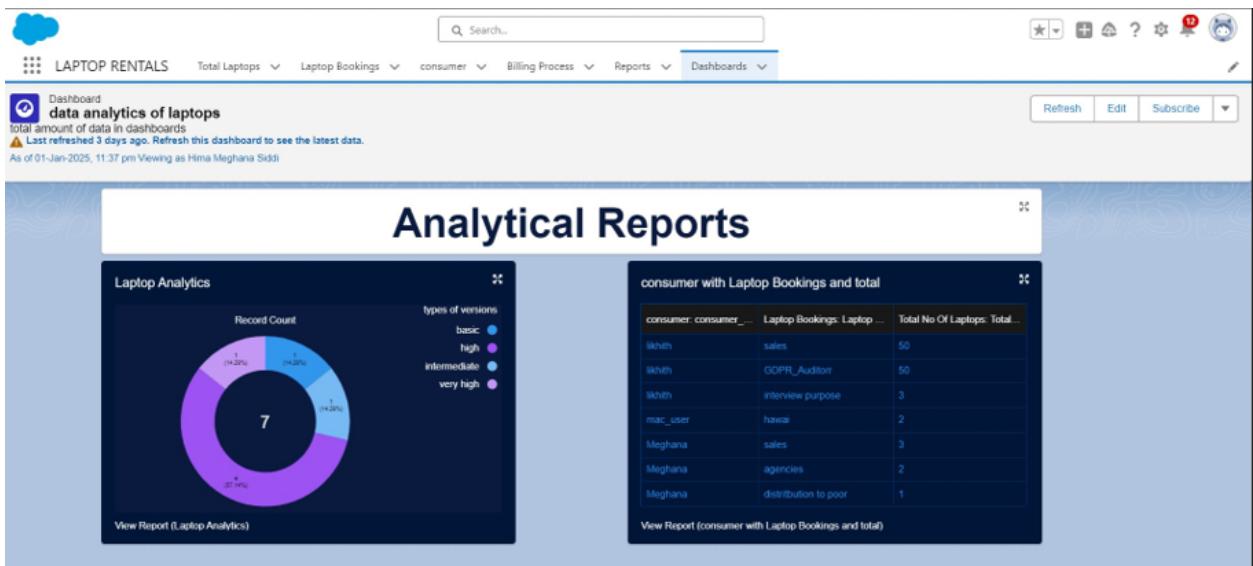
Description

Folder

o

- Select add component.
- Select a Report and click on select.
- Select the dark component and add to the dashboards.
- Save it and Click done.

Dashboard output:

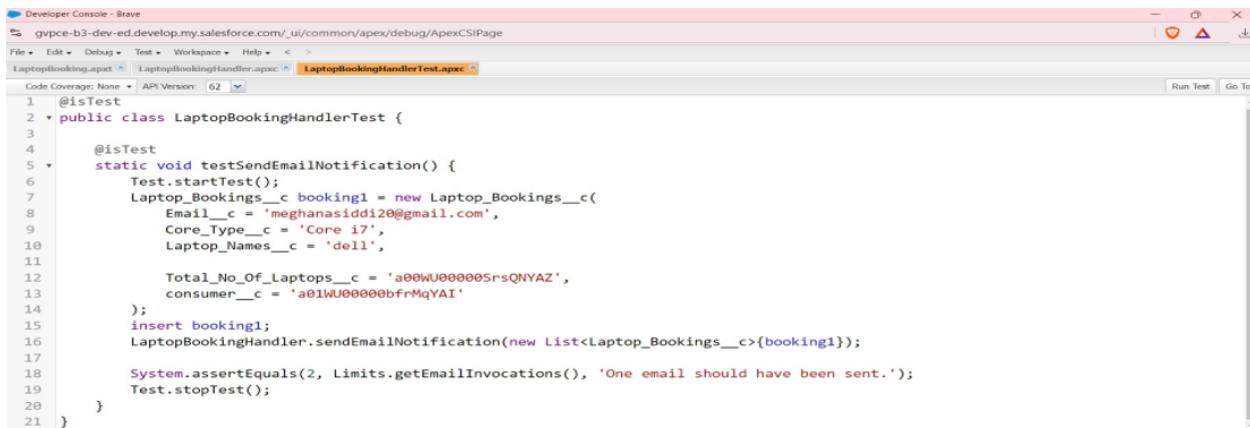


Testing and Validation

Unit Testing

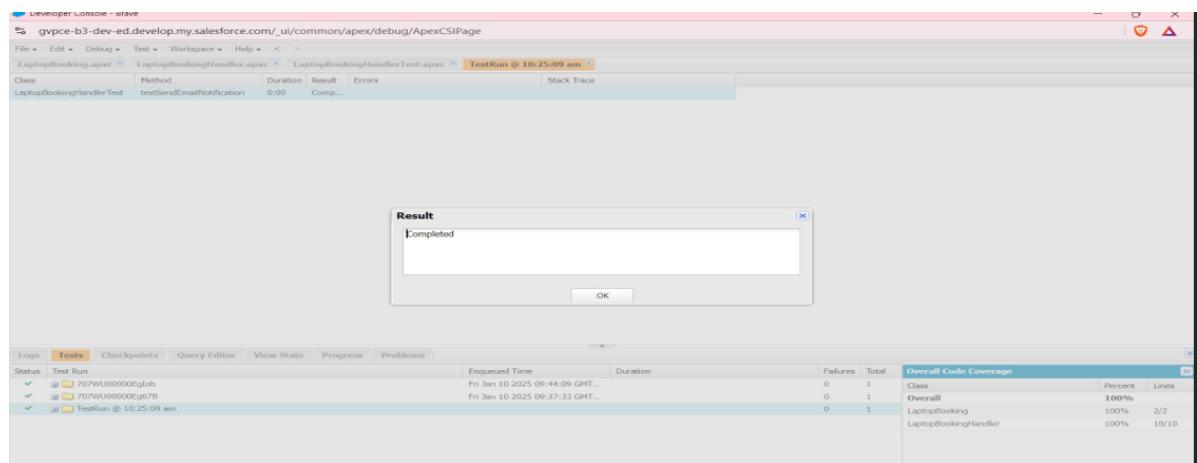
Testing the Laptop Booking Handler class

LaptopBookingHandlerTest.apxc code snippet:



```
Developer Console - Brave
gypce-b3-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage
File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < ▾
LaptopBooking.apxc LaptopBookingHandler.apxc LaptopBookingHandlerTest.apxc
Code Coverage: None API Version: 62
1 @isTest
2 + public class LaptopBookingHandlerTest {
3
4     @isTest
5     static void testSendEmailNotification() {
6         Test.startTest();
7         Laptop_Bookings__c booking1 = new Laptop_Bookings__c{
8             Email__c = 'meghanasiddi20@gmail.com',
9             Core_Type__c = 'Core i7',
10            Laptop_Names__c = 'dell',
11
12            Total_No_Of_Laptops__c = 'a00WU00000SrsQNYAZ',
13            consumer__c = 'a01WU00000bfrMqYAI'
14        };
15        insert booking1;
16        LaptopBookingHandler.sendEmailNotification(new List<Laptop_Bookings__c>{booking1});
17
18        System.assertEquals(2, Limits.getEmailInvocations(), 'One email should have been sent.');
19        Test.stopTest();
20    }
21 }
```

Output:



The screenshot shows the Developer Console interface with the following details:

- Test Run:** TestRun @ 10:25:09 am
- Logs:** Logs, Tests, Checkpoints, Query Editor, View State, Progress, Problems
- Overall Code Coverage:**

Class	Percent	Lines
Overall	100%	
LaptopBooking	100%	2/2
LaptopBookingHandler	100%	10/10
- Test Results:** Completed

Overall code coverage is 100%

Explanation:

"**System.assertEquals**" is a method in Salesforce's Apex programming language, used for unit testing. It helps verify that the expected value matches the actual value produced by your code

```
apex
```

 Copy code

```
System.assertEquals(Object expected, Object actual, String message);
```

This test is successfully completed indicating all functionalities working good.

a. Validation

I observed that

- i. In Consumer, Laptopbookings, Total Laptops objects, the required fields are set up and if when creating records, if any required field is not entered, then it throws an error like

```
javascript
```

 Copy code

```
Required fields are missing: <Field Name>
```

- ii. It is verified when creating Laptopbookings object and missed a field, then the output is

- iii. The validation rule "Phonenumberoremailblankrule" in consumer object ensures that at least one of the fields, phone_number_c or email_c, is filled when creating or updating a record in the Consumer object.

If both fields are left blank, the rule prevents the record from being saved and displays an error message.

It displayed the message “phone number and email number should not be blank”

2. Key Scenarios Addressed by Salesforce in Implementation Of The Project

- **Customer Relationship Management (CRM):** Salesforce handles managing and analyzing customer interactions and data, improving customer service and engagement.
- **Sales Process Automation:** It automates various sales processes, like tracking leads, opportunities, and performance, helping sales teams close deals faster.
- **Marketing Campaigns and Engagement:** Salesforce enables personalized marketing campaigns and provides tools for tracking and analyzing their effectiveness.
- **Service Management:** It supports case management, service cloud, and provides tools for customer support teams to resolve issues efficiently.
- **Analytics and Reporting:** Salesforce helps generate real-time reports and dashboards, providing insights into business operations and customer behavior.

- **Collaboration and Integration:** The platform ensures streamlined workflows and improved productivity.

3. Conclusion

The **Laptop Rental CRM** has successfully created a digital platform to streamline the entire laptop rental process. By implementing real-time tracking, efficient coordination of rentals, and a user-friendly interface, the CRM has improved the efficiency and effectiveness of laptop rental operations. Key milestones include integrating online booking, automating payment processing, and developing tools for inventory management and customer relationship management. With this project, we have taken a step toward optimizing the rental process, enhancing customer satisfaction, and increasing the profitability of the laptop rental business.