

An Internship Report

On

Salesforce AI Developer Virtual Internship

Submitted In accordance with the requirement for the degree of

BACHELOR OF TECHNOLOGY

INFORMATION TECHNOLOGY

Submitted by

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DEPARTMENT OF INFORMATION TECHNOLOGY

KALLAM HARANADHAREDDY INSTITUTE OF TECHNOLOGY

(AUTONOMOUS)

Approved by (AICTE, New Delhi; Permanently Affiliated to JNTU KAKINADA)

Accredited by NAAC with an 'A' Grade

NH – 16, Chowdavaram, Guntur – 522019 (A.P)

ACADEMIC YEAR: 2024-2025

Project Title :A CRM APPLICATION FOR LAPTOP RENTALS

Project Overview : The CRM application for laptop rentals is designed to streamline and optimize the entire rental process for a laptop rental business. It will feature comprehensive customer management tools, allowing for the creation, editing, and tracking of customer profiles, rental histories, and communications. The application will also include a robust inventory management system to track available laptops, their specifications, rental rates, and conditions, alongside the ability to record and manage rental transactions, including due dates, payment status, and invoicing. Customers will be able to book laptops online, with a booking system integrated into the platform, while administrators can manage maintenance schedules for laptops requiring repairs.

SalesforceIntroduction:

Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don't know where you should start on your learning journey? If you've answered yes to any of these questions, then you're in the right place. This module is for you.

Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module, we'll take you through these features and answer the question, "What is Salesforce, anyway?"

What Is Salesforce?

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

Objectives:

Business goals: The primary business goal of implementing a CRM application for laptop rentals is to enhance operational efficiency and profitability. By streamlining the rental process, the application aims to reduce administrative overhead, minimize errors, and optimize inventory utilization. This will lead to cost savings and increased revenue through better resource management. Additionally, the application seeks to improve customer satisfaction by providing a seamless booking experience, timely notifications, and personalized interactions. Enhanced customer relationships are expected to result in higher customer retention rates and increased repeat business.

Expected outcome : The expected output includes a significant reduction in the time required to manage rentals, from booking to return, thereby improving overall service delivery. The application will provide real-time inventory tracking, ensuring that laptops are always available for rent and reducing downtime. Automated billing and payment tracking will streamline financial processes, leading to more accurate and timely revenue collection. Detailed reports and dashboards will offer valuable insights into rental trends, customer preferences, and financial performance, enabling data-driven decision making. Ultimately, the CRM application will contribute to a more organized, efficient, and customer-centric rental operation, driving business growth and success.

Key Features

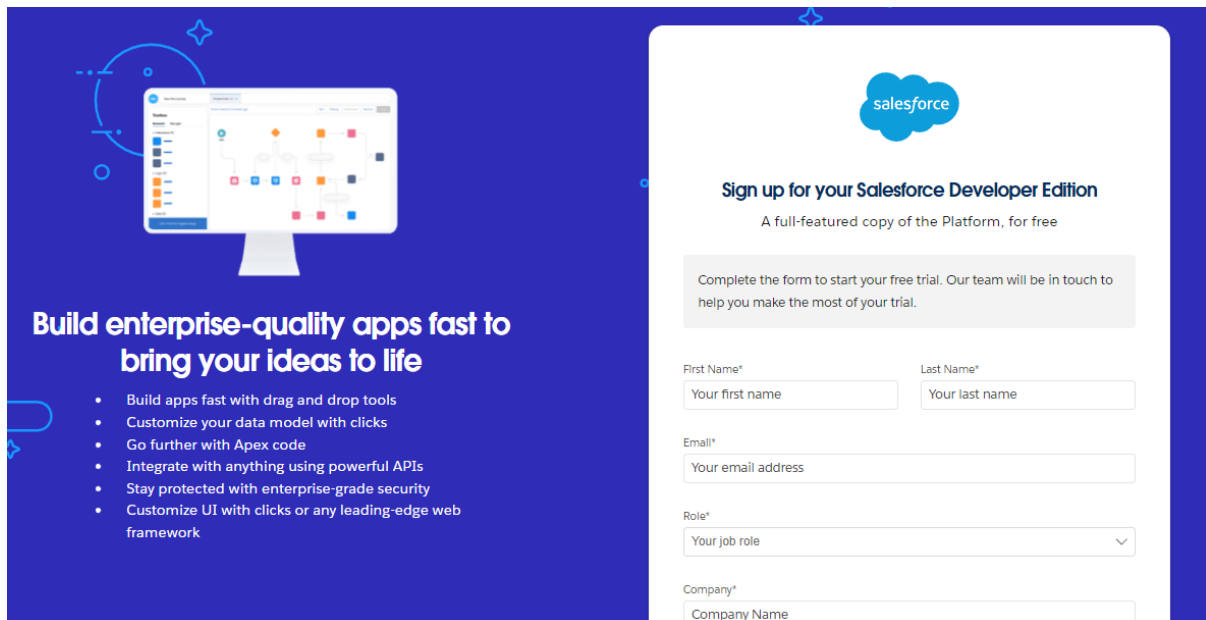
- **Device Inventory Management:** Easily add, update, and manage laptops in the inventory. Store comprehensive details like model, specifications, rental price, and availability status.
- **Rental and Return Tracking:** Monitor rental status, including duration, due dates, and overdue alerts. Simplify the return process by updating availability and recording return dates.
- **Customer Management:** Store customer information such as name, contact details, rental history, and preferences. Record all interactions, including communications and feedback.
- **Booking Process:** Facilitate the entire booking process, from reservation to completion, with availability checks and confirmation emails. Prevent double bookings to improve customer satisfaction.
- **Billing and Payment:** Automatically generate invoices based on rental duration and pricing rules. Track payments received and pending, and send reminders for overdue payments.
- **User Roles and Profiles:** Define different access levels for users like owners, managers, and agents to ensure data security and appropriate permissions.

- **Validation Rules:** Ensure data accuracy by implementing validation rules for critical fields such as phone number and email.
- **Automation:** Automate key processes like laptop distribution, rental extensions, and billing using Salesforce Flows and Apex triggers.
- **Reports and Dashboards:** Generate detailed reports on device utilization, rental durations, customer preferences, and financial performance. Provide customizable dashboards for real-time insights.
- **Notifications and Alerts:** Send automated notifications to customers for booking confirmations, due dates, and overdue alerts. Notify staff about important events like low inventory levels and upcoming maintenance.

Milestone 1: Creating Developer Account

Creating a developer org in salesforce.

1. Go to <https://developer.salesforce.com/signup>
2. On the sign up form, enter the following details :



Build enterprise-quality apps fast to bring your ideas to life

- Build apps fast with drag and drop tools
- Customize your data model with clicks
- Go further with Apex code
- Integrate with anything using powerful APIs
- Stay protected with enterprise-grade security
- Customize UI with clicks or any leading-edge web framework

Sign up for your Salesforce Developer Edition
A full-featured copy of the Platform, for free

Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.

First Name* Last Name*

Email*

Role*

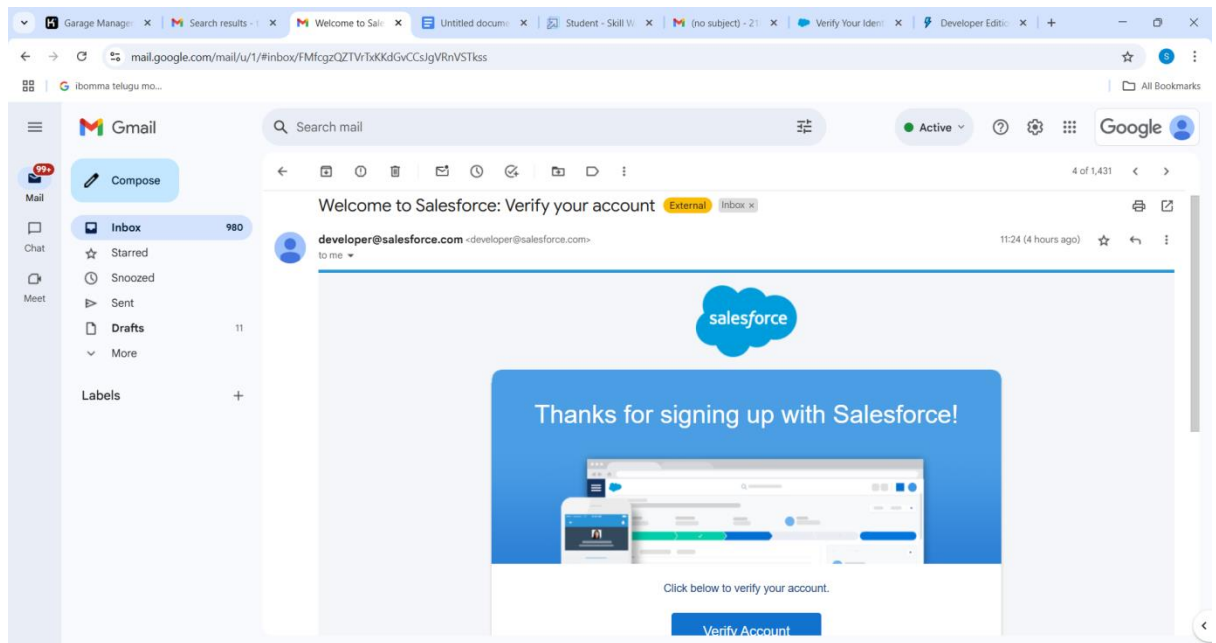
Company*

Then Fill the Details

1. **First name & Last name** : batch15 Sudheer
2. **Email** :218x1a1225@khitguntur.ac.in
3. **Role** :Developer
4. **Company** :KHIT
5. **County** :India
6. **Postal Code** :522005
7. **Username** :batch15@lapirentals.com

Account Activation

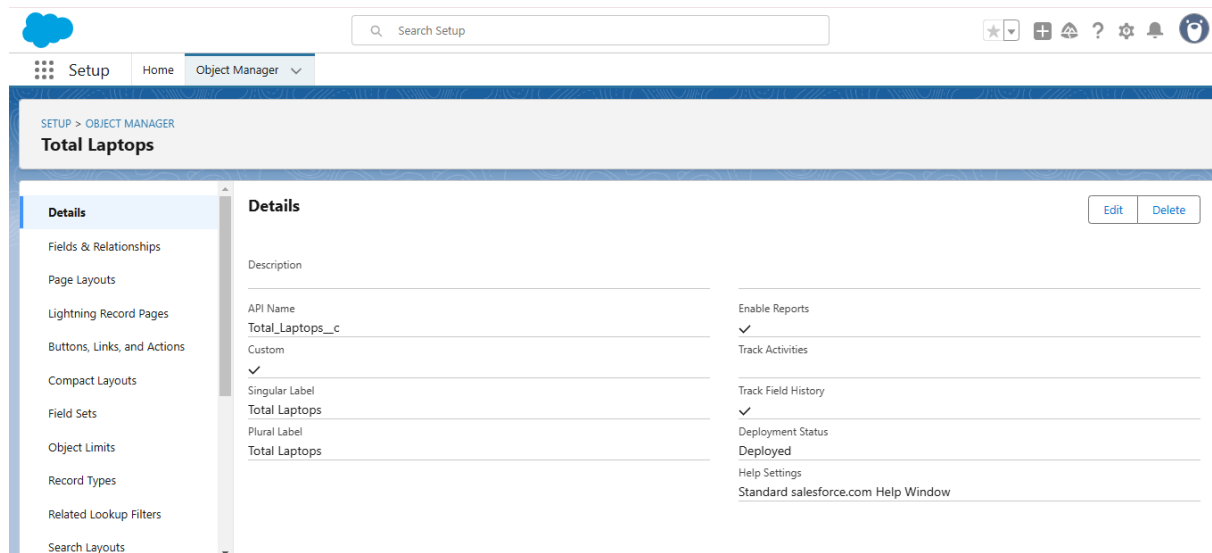
1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.



2. Click on Verify Account
3. Give a password and answer a security question and click on change password.

Milestone 2 :Create Total Laptops Object

1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
 - 1) Enter the label name>> Total Laptops
 - 2) Plural label name>> Total Laptops
 - 3) Enter Record Name Label and Format
Record Name >>Total Laptops
Data Type >> Text
2. Click on Allow reports,Allow search and Track Field History,
3. Allow search >> Save.



Create Consumer Object

To create an object:

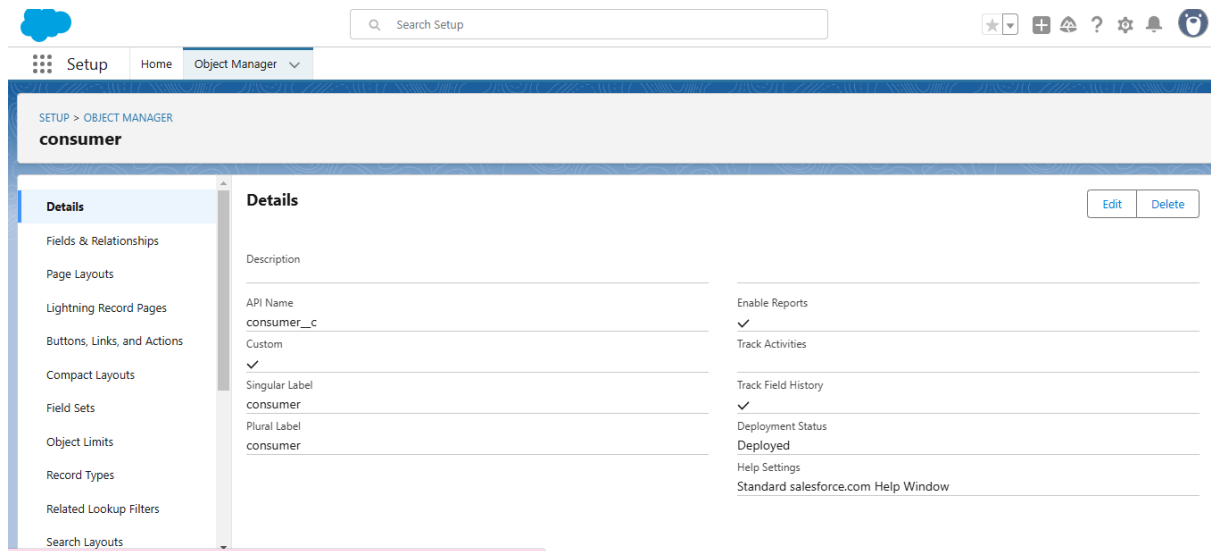
From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.

- 1) Enter the label name >> consumer
- 2) Plural label name >> consumer
- 3) Enter Record Name Label and Format

Record Name >> consumer_name

Data Type >> Name

2. Click on Allow reports, Allow search and Track Field History,
3. Allow search >> Save.



Create Laptop Booking Object

To create an object:

From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.

1) Enter the label name >> Laptop Bookings

2) Plural label name >> Laptop Bookings

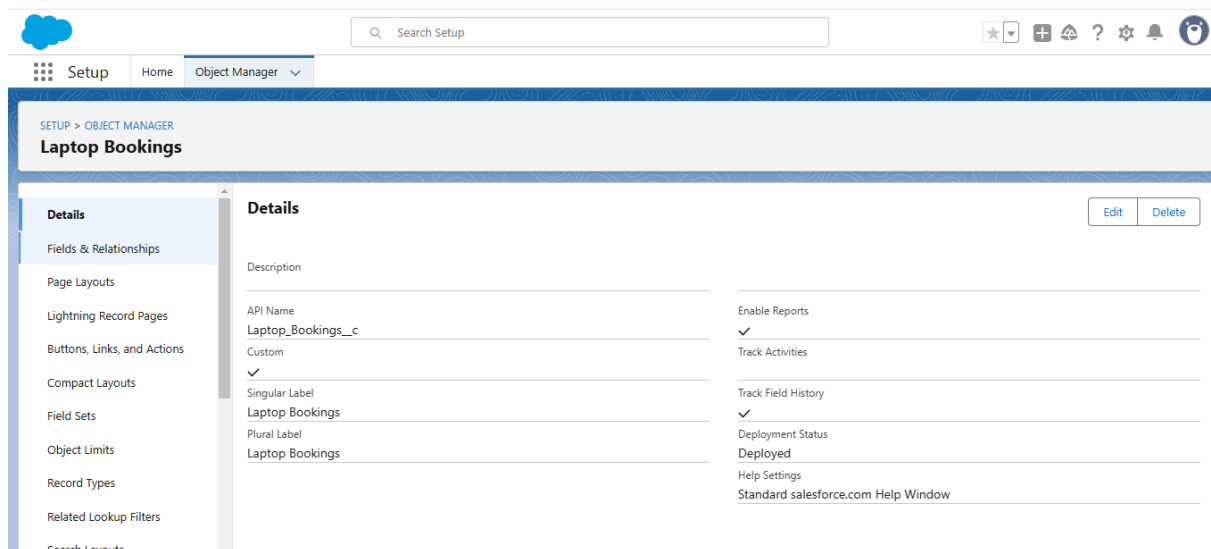
3) Enter Record Name Label and Format

Record Name >> Laptop Bookings

Data Type >> Name

2. Click on Allow reports, Allow search and Track Field History,

3. Allow search >> Save.



Create Billing Process Object

To create an object:

From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.

1) Enter the label name >> Billing Process

2) Plural label name >> Billing Process

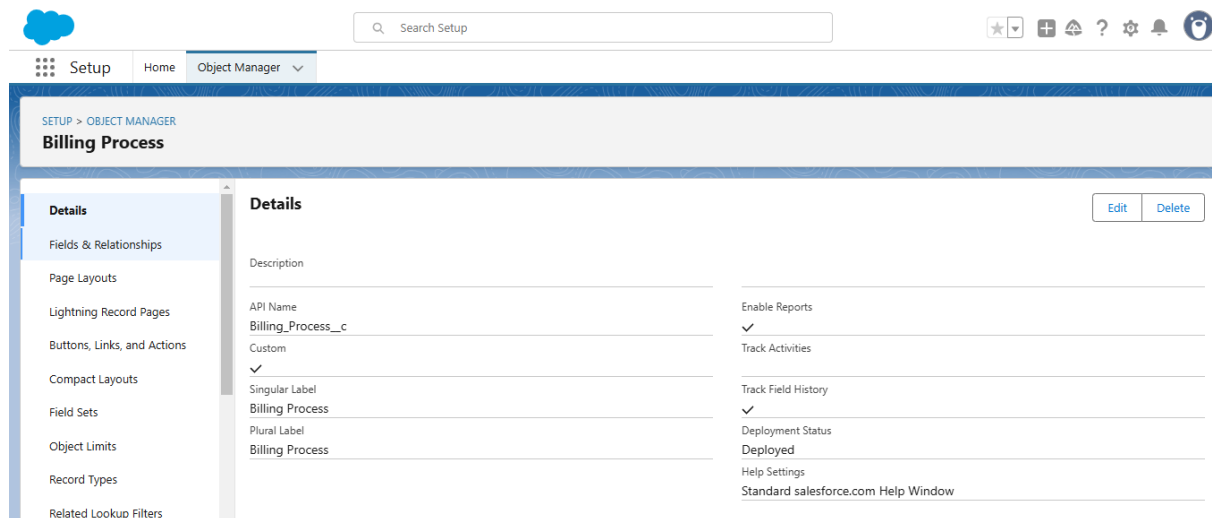
3) Enter Record Name Label and Format

Record Name >> Billing ProcessName

Data Type >> Name

2. Click on Allow reports, Allow search and Track Field History,

3. Allow search >> Save.

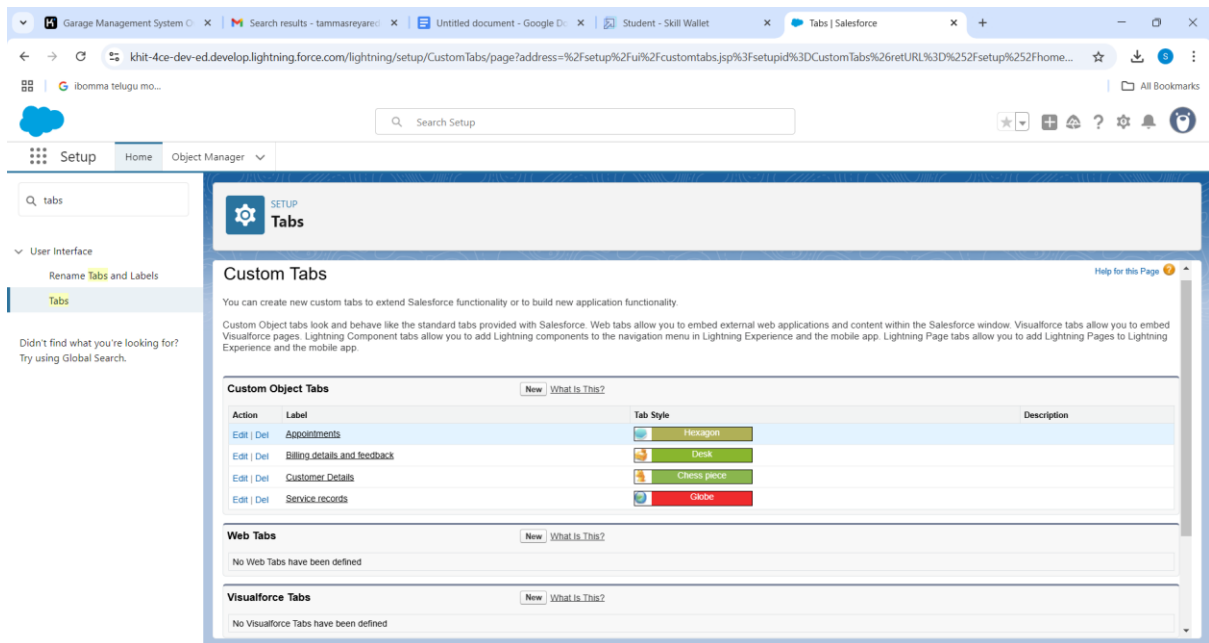


Milestone 3 :Tabs

Creating a Custom Tab

To create a Tab:(Customer Details)

1. Go to 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.



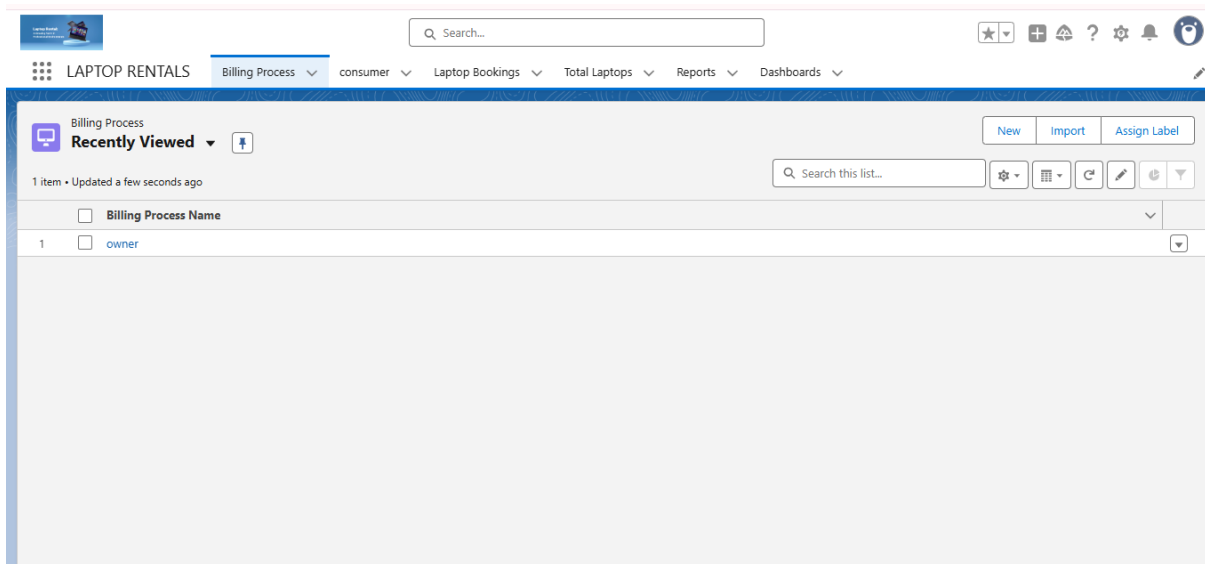
Creating Remaining Tabs

1. Now create the Tabs for the remaining Objects, they are “consumer,Laptop Booking,Billing process”.
2. Follow the same steps as mentioned in Activity -1

Milestone 4 :The Lightning App

To create a lightning app page:

1. Go to setup page >> search “app manager” in quick find >> 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. To Add Navigation Items:
4. Select the items (Total Laptops,consumer,Laptop Booking,Billing Process) from the search bar and move it using the arrow button >> Next
5. To Add User Profiles



Milestone 5 :Fields

Creation of fields for the Consumer object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(consumer) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data Type as a “Phone”
4. Click on next
5. Fill the Above as following:
 Field Label: Phone number
 Field Name : gets auto generated
 Click the required option checkbox.
 Click on Next >> Next >> Save and new.

Note: Follow the above steps for the remaining field for the same object.

▪ To create another fields in an object:

1. Go to setup >> click on Object Manager >> type object name(consumer) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as a “Text Area” and Click on Next
4. Fill the Above as following:
 - Field Label: Address
 - Field Name : It’s gets auto generated
 - Select Required field.
 - Click on Next >> Next >> Save and new.

Setup

Home

Object Manager

Search Setup

Star

Plus

Cloud

Help

Settings

Notifications

User

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

Fields & Relationships

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	Phone		

Creation of Laptop Names Field on Appointment Object :

Setup

Home

Object Manager

Search Setup

Star

Plus

Cloud

Help

Settings

Notifications

User

SETUP > OBJECT MANAGER

Laptop Bookings

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

Laptop Bookings Custom Field

Laptop Names

Back to Laptop Bookings

Validation Rules (0)

Custom Field Definition Detail

Edit

Set Field-Level Security

View Field Accessibility

Where is this used?

Field Label	Laptop Names	Object Name	Laptop Bookings
Field Name	Laptop_Names	Data Type	Picklist
API Name	Laptop_Names__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	sudheer @15, 03/03/2025, 3:57 pm	Modified By	sudheer @15, 03/03/2025, 3:57 pm

General Options

Required

Default Value

Creation of Formula Field on Total Laptops Object :

Setup

Home

Object Manager

Search Setup

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

Fields & Relationships

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	Text(80)		✓

Milestone 6 :Validation rule

To create a validation rule to an Appointment Object

1. Go to the setup page >> click on object manager >> From drop down click edit for consumer object.
2. Click on the validation rule >> click New.
3. Enter the Rule name as “Phonenumberoremailblankrule”.
4. Enter the description as “phone number and email number should not be blank”.
5. Enter the formula as “OR(ISBLANK(phone_number__c) , ISBLANK(email__c))” and check the syntax.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes the Setup icon, a search bar labeled 'Search Setup', and several utility icons. The main navigation menu on the left lists various setup options: Setup, Home, Object Manager (selected), Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'SETUP > OBJECT MANAGER' and 'consumer'. It displays a 'Validation Rules' section with a 'New' button and a table of existing rules. The table has columns for Rule Name, Error Location, Error Message, Active status, and Modified By. One rule is listed: 'Phonenumberoremailblankrule' with an error location of 'Top of Page' and an error message of 'Please fill the details Properly'. The rule is active and was modified by 'sudheer' on 04/03/2025 at 12:49 pm.

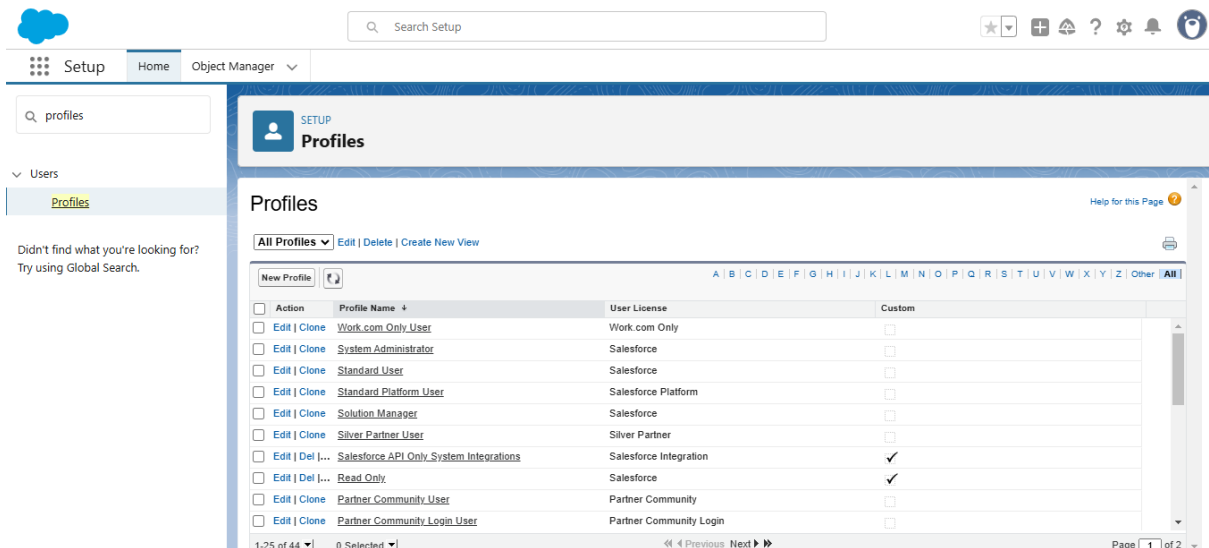
RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Phonenumberoremailblankrule	Top of Page	Please fill the details Properly	✓	sudheer @15, 04/03/2025, 12:49 pm

Milestone 8 :Profiles

Owner Profile

To create a new profile:

1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Standard User) >> enter profile name (Manager) >> Save.
2. Scroll down to Custom Object Permissions and Give access permissions for Total Laptops, consumers , Laptop Booking and Billing Process objects as mentioned in the below diagram.
3. Give Access and save it.

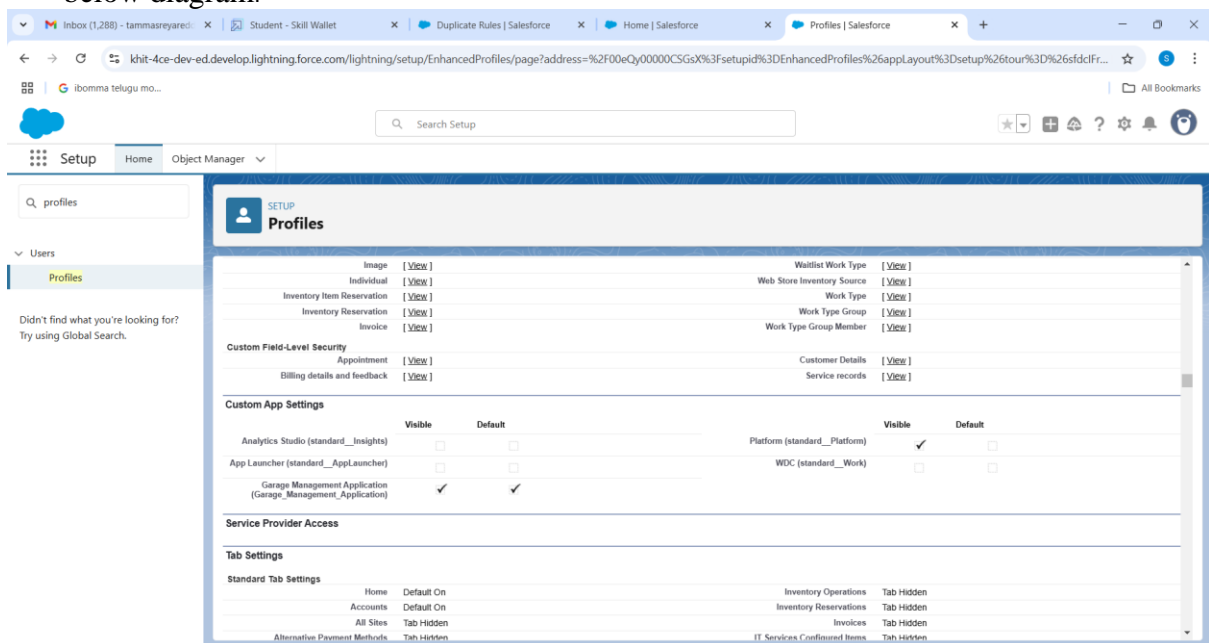


The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'profiles' entered. The main content area is titled 'Profiles' and shows a list of existing profiles. The 'All Profiles' dropdown is selected, and the 'Edit' link is visible. The table below lists various profiles with their actions and user licenses.

Action	Profile Name	User License	Custom
Edit Clone	Work.com Only User	Work.com Only	<input type="checkbox"/>
Edit Clone	System Administrator	Salesforce	<input type="checkbox"/>
Edit Clone	Standard User	Salesforce	<input type="checkbox"/>
Edit Clone	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
Edit Clone	Solution Manager	Salesforce	<input type="checkbox"/>
Edit Clone	Silver Partner User	Silver Partner	<input type="checkbox"/>
Edit Delete Read Only	Salesforce API Only System Integrations	Salesforce Integration	<input checked="" type="checkbox"/>
Edit Delete Read Only	Read Only	Salesforce	<input checked="" type="checkbox"/>
Edit Clone	Partner Community User	Partner Community	<input type="checkbox"/>
Edit Clone	Partner Community Login User	Partner Community Login	<input type="checkbox"/>

Agent Profile

1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Standard Platform User) >> enter profile name (Agent) >> Save.
2. While still on the profile page, then click Edit.
3. Scroll down to Custom Object Permissions and Give access permissions for Total Laptops, consumer , Laptop Bookings and Billing Process objects as mentioned in the below diagram.



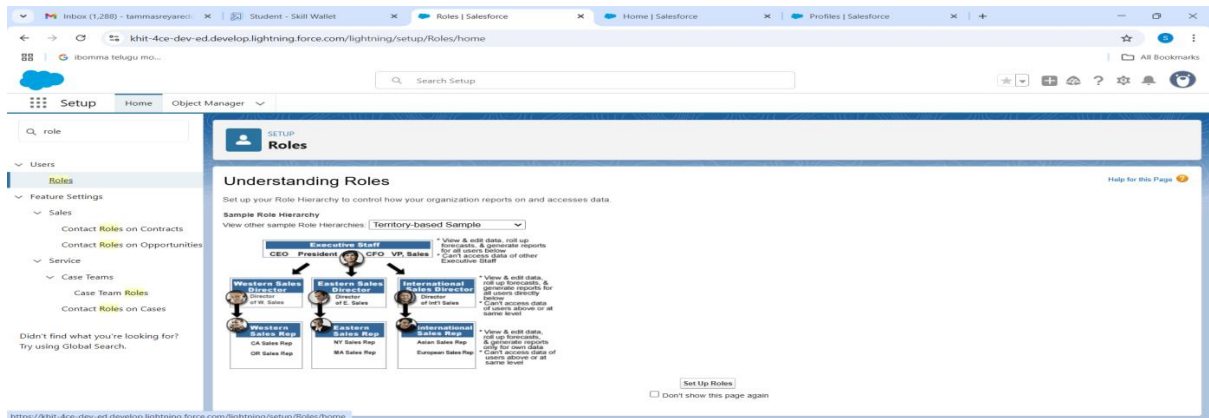
The screenshot shows the Salesforce Setup interface with the 'Profiles' page. The 'Custom App Settings' section is expanded, showing a table with 'Visible' and 'Default' columns for various applications. The 'Platform (standard__Platform)' application is checked for both 'Visible' and 'Default'.

Application	Visible	Default
Analytics Studio (standard__Insights)	<input type="checkbox"/>	<input type="checkbox"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input type="checkbox"/>
Garage Management Application (Garage_Management_Application)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Platform (standard__Platform)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
WDC (standard__Work)	<input type="checkbox"/>	<input type="checkbox"/>

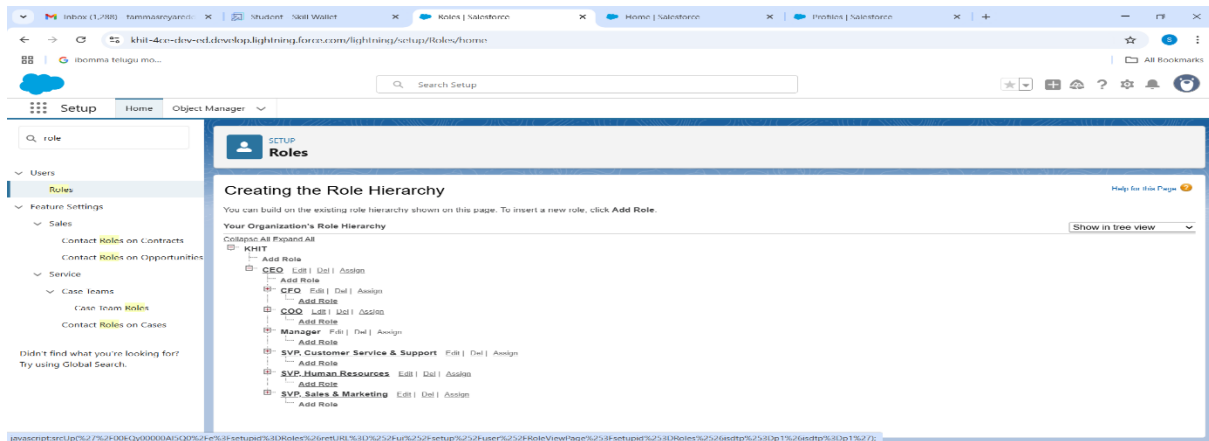
Milestone 9 :Role & Role Hierarchy

Creating Manager Role:

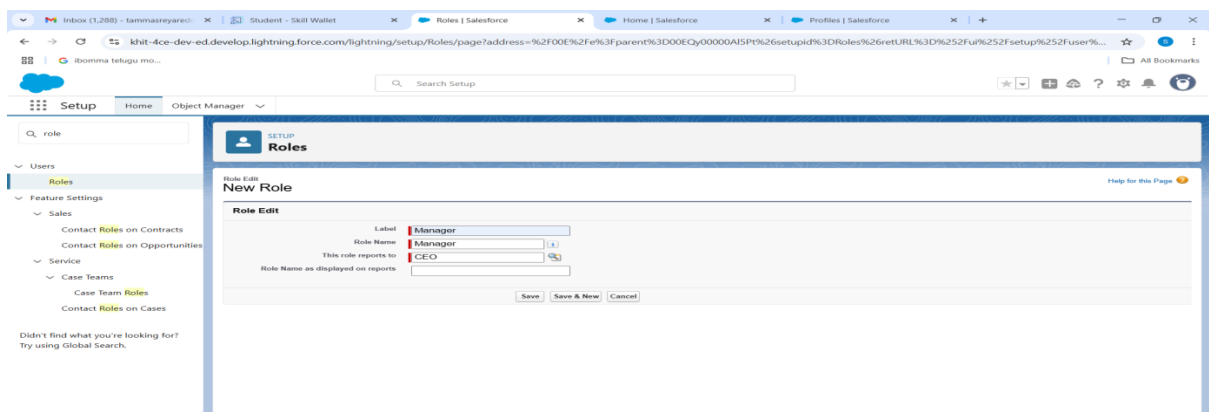
1. Go to quick find >> Search for Roles >> click on set up roles.



2. Click on Expand All and click on add role under whom this role works.



3. Give Label as “Owner” and Role name gets auto populated. Then click on Save.



Creating another roles

1. Creating another two roles under Owner
2. Go to quick find >> Search for Roles >> click on set up roles.

- Click plus on CEO role, and click add role under manager.
- Give Label as “Agent” and Role name gets auto populated. Then click on Save.

The screenshot shows the Salesforce Lightning Setup page for Roles. The left sidebar contains a navigation menu with 'roles' selected. The main content area displays the 'sales person' role details. Below the role name, there is a description: 'Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.' The hierarchy is shown as 'KHIT > CEO > Manager > sales person'. The 'Role Detail' section shows the role is labeled 'sales person', managed by 'MANAGER' on 04/03/2020 at 12:48 pm, and is associated with the 'Internal and External Subordinates' sharing group. The 'Users in sales person Role' section shows no records.

Milestone 10 :Users

Create User

- Go to setup - type users in quick find box - select users -click New user.
 - Fill in the fields
 - First Name : vicky
 - Last Name : y
 - Alias : Give a Alias Name
 - Email id : Give your Personal Email id
 - Username : Username should be in this form: text@text.text
 - Nick Name : Give a Nickname
 - Role : owner
 - User license : Salesforce
 - Profiles : owner.
- Save it.

The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with 'users' and a list of navigation items: Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Feature Settings, Data.com, and Prospector. The main content area is titled 'Users' and shows the details for a user named 'vicky y'. The user's role is 'owner' and their user license is 'Salesforce'. The user's email is '218x1a1225@khilguntur.ac.in' and their username is '218x1a1225@khilguntur.ac.in'. The user's nickname is 'Nobi'. The user's address is 'User: vicky y - Salesforce - Developer Edition me (Asia/Kolkata)'. The user's locale is 'English (India)'. The user's profile is 'owner' and they are an active user. The user's marketing user checkbox is checked. The user's offline user checkbox is checked. The user's knowledge user checkbox is checked. The user's flow user checkbox is checked. The user's service cloud user checkbox is checked. The user's site.com contributor user checkbox is checked. The user's site.com publisher user checkbox is checked. The user's WDC user checkbox is checked.

Setup
Home
Object Manager

Search Setup

users

Users

User: vicky y

Permission Set Assignments | Permission Set Assignments Activation Required | Permission Set Group Assignments | Permission Set License Assignments | Personal Groups | Public Group Memberships | Queue Memberships | Team | Managers in the Role Hierarchy | OAuth Apps | Third-Party Account Links | Installed Mobile Apps | Authentication Settings for External Systems | Login History | User Provisioning Accounts

User Detail

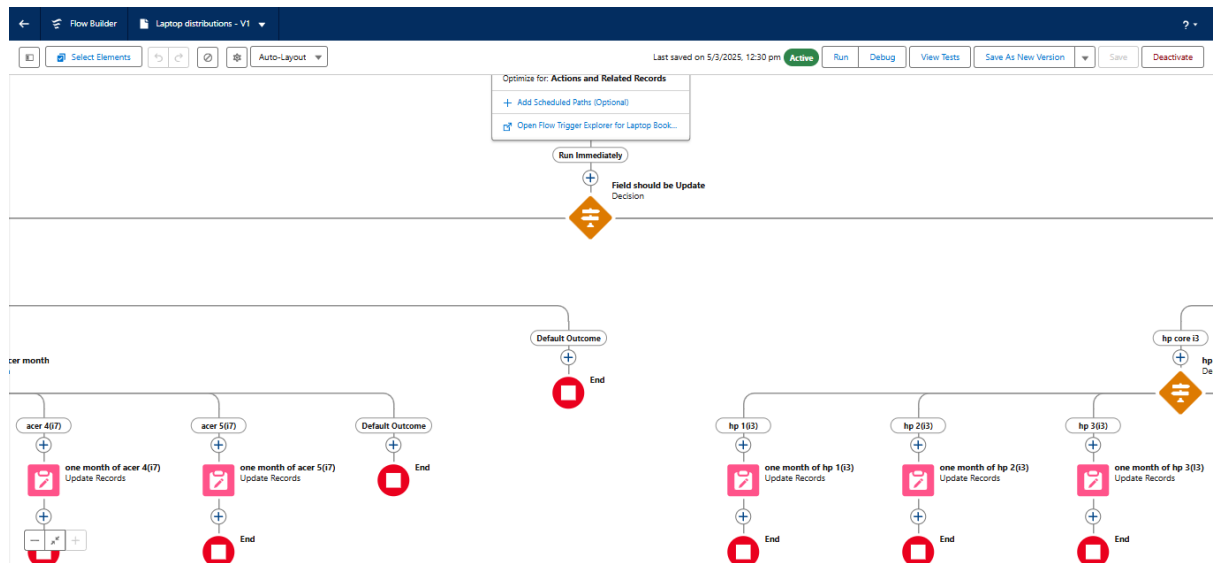
Edit | Sharing | Reset Password | Freeze | View Summary

Name	vicky y	Role	owner
Alias	vy	User License	Salesforce
Email	218x1a1225@khilguntur.ac.in (Verify)	Profile	owner
Username	218x1a1225@khilguntur.ac.in	Active	✓
Nickname	Nobi	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address	User: vicky y - Salesforce - Developer Edition me (Asia/Kolkata)	Site.com Contributor User	<input type="checkbox"/>
Locale	English (India)	Site.com Publisher User	<input type="checkbox"/>
		WDC User	<input type="checkbox"/>

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

Milestone 11 : Create a Flow on dell laptop

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



- 2.Select the Record-triggered flow and Click on Create.
- 3.Select the Object as a Laptop Booking in the Drop down list.
- 4.Select the Trigger Flow when: “A record is Created or Updated”.
- 5.Select the Optimize the flow for: “Actions and Related Records” and Click on Done.
- 6.Under the Record-triggered Flow Click on “+” Symbol and In the Drop down List select the “Decision Element
- 7.Enter the Details Label: Field should be Update, API name: Gets Automatically Generated.
- 8.Enter the Outcome Details Label: dell , Outcome API name: Gets Automatically Generated.
 - Resource: Select \$Record.Laptop_name__c.
 - Operator: Select Equals.
 - Value: Select dell
 - Add the same outcome order to acer , hp, mac.
 - Rename Default outcome as False
 - Click done.

To Create Flow On Acer Laptop

1. Go to flow page
2. Beside acer there is a symbol ‘+’ click on that.
3. Again select decision
4. Enter the Details Label: Acer core type selection, API name: Gets Automatically Generated.
5. Select the Outcome Details Label: acer core i3 , Outcome API name: Gets Automatically Generated.
 - Resource: Select Record.core type.
 - Operator: Select Equals.
 - Value: Select core i3.
6. Similarly create outcomes for acer core i5 and acer core i7 also.

7. Beside dell there is a symbol ‘+’ click on that.
8. Again select decision
9. Enter the Details Label: Acer months selected , API name: Gets Automatically Generated.
10. Enter the Outcome Details Label: acer 1(i3) , Outcome API name: Gets Automatically Generated.
11. Resource: Select Record.how many months.
12. Operator: Select Equals.
13. Value: 1.
14. Enter the Outcome Details Label: acer 2(i3) , Outcome API name: Gets Automatically Generated.
15. Resource: Select Record.how many months.
16. Operator: Select Equals.
17. Value: Select 2..
18. Click ‘+’ outcome details
19. Enter the Outcome Details Label: acer 3(i3) , Outcome API name: Gets Automatically Generated.
20. Resource: Select Record.how many months.
21. Operator: Select Equals.
22. Value: Select 3..
23. Click ‘+’ outcome details
24. Enter the Outcome Details Label: acer 4(i3) , Outcome API name: Gets Automatically Generated.
25. Resource: Select Record.how many months.
26. Operator: Select Equals.
27. Value: Select 4.
28. Click ‘+’ outcome details
29. Enter the Outcome Details Label: acer 5(i3) , Outcome API name: Gets Automatically Generated.
30. Resource: Select Record.how many months.
31. Operator: Select Equals.
32. Value: Select 5.
1. Select the resource type as text template
2. Amount paid : { !\$Record.Payment_Paid__c }
3. Thank you for Coming .
4. Click done.
5. Now Click on Add Element , select Action.
6. Their action bar will be opened in that search for “ send email ” and click on it.
7. Give the label name as “ Email Alert”
8. API name will be auto populated.
9. Enable the body in set input values for the selected action.
10. Select the text template that created , Body : { !alert }
11. Include recipient address list select the email form the record.

12. RecipientAddressList:

```
{!$Record.Service_records__r.Appointment__r.Customer_Name__r.Gmail__c}
```

13. Include subject as “ Thank You for Your Payment - Garage Management”.

14. Click done.

15. Click on save. Give the Flow label , Flow Api name will be autopopulated.

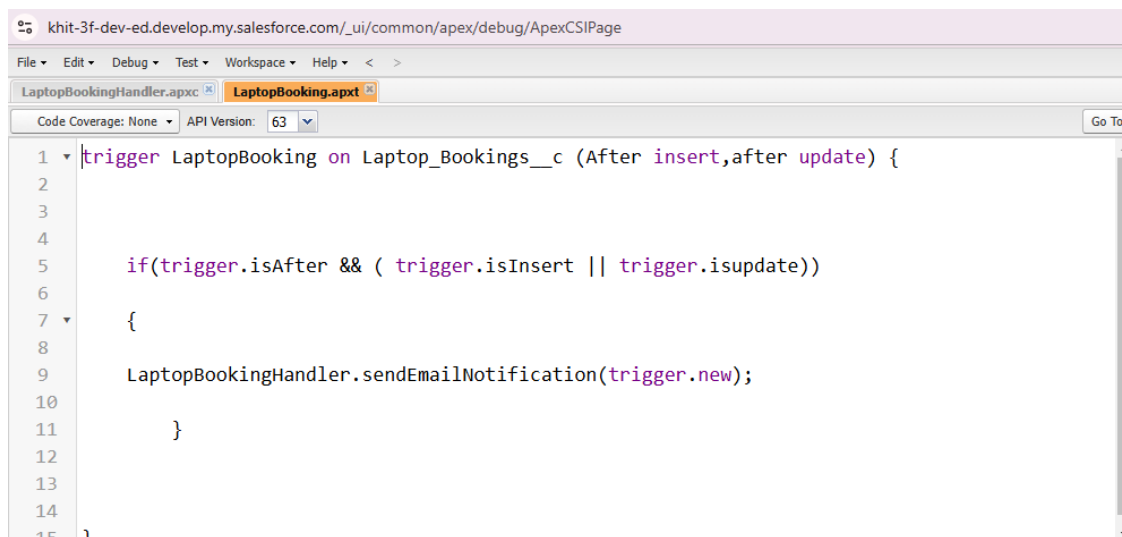
16. And click save, and click on activate.

Milestone 14 :Apex Trigger

Apex handler

UseCase : This use case works for Amount Distribution for each Service the customer selected for there Vehicle.

1. While still in the trailhead account, navigate to the gear icon in the top right corner.
2. Click on developer console and you will be navigated to a new console window.
3. Click on the File menu in the toolbar, and click on new? Trigger.
4. Enter the trigger name and the object to be triggered



The screenshot shows the Salesforce Developer Console interface. The browser address bar displays the URL: `khiti-3f-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage`. The console toolbar includes menus for File, Edit, Debug, Test, Workspace, and Help. Two tabs are open: `LaptopBookingHandler.apxc` and `LaptopBooking.apxt`. The status bar indicates 'Code Coverage: None' and 'API Version: 63'. The code editor displays the following Apex trigger:

```
1 trigger LaptopBooking on Laptop_Bookings__c (After insert,after update) {
2
3
4
5     if(trigger.isAfter && ( trigger.isInsert || trigger.isupdate))
6
7     {
8
9         LaptopBookingHandler.sendEmailNotification(trigger.new);
10
11     }
12
13
14
15 }
```

Trigger Handler:

How to create a new trigger :

1. While still in the trailhead account, navigate to the gear icon in the top right corner.
2. Click on developer console and you will be navigated to a new console window.
3. Click on File menu in the tool bar, and click on new? Trigger.
4. Enter the trigger name and the object to be triggered.
5. Name :LaptopBooking
6. sObject :Booking __c

Syntax For creating trigger :

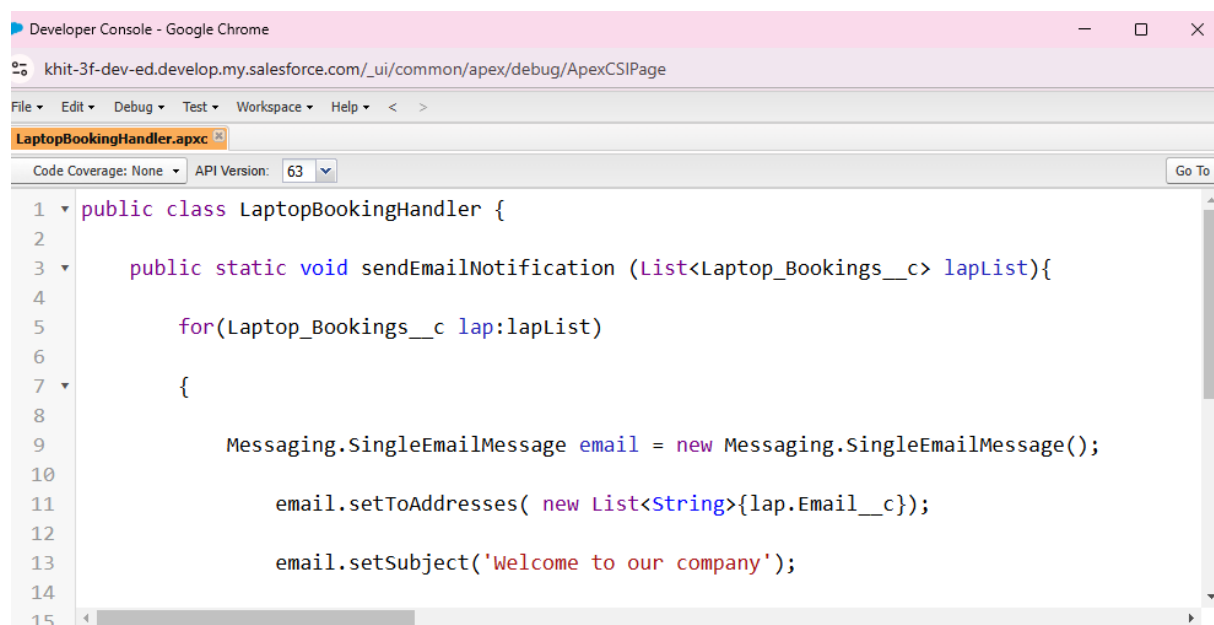
The syntax for creating trigger is :

Trigger [trigger name] on [object name](Before/After event)

```
{
}
```

In this project , trigger is called whenever the particular records sum exceed the threshold i.e minimum business requirement value. Then the code in the trigger will get executed.

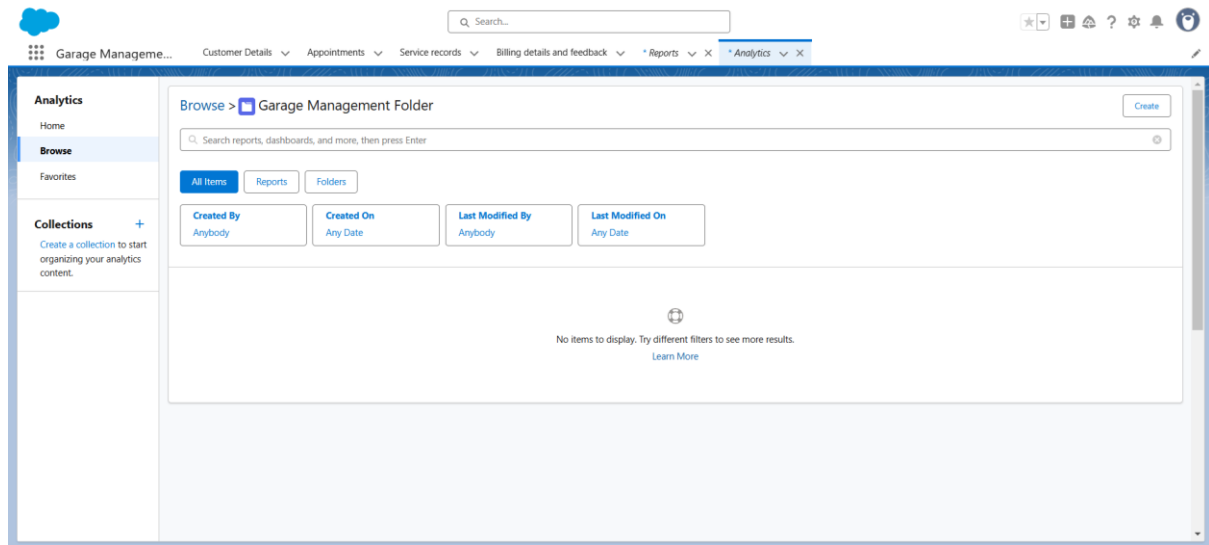
1. Handler for the Laptop Booking Object



Milestone 15 :Reports

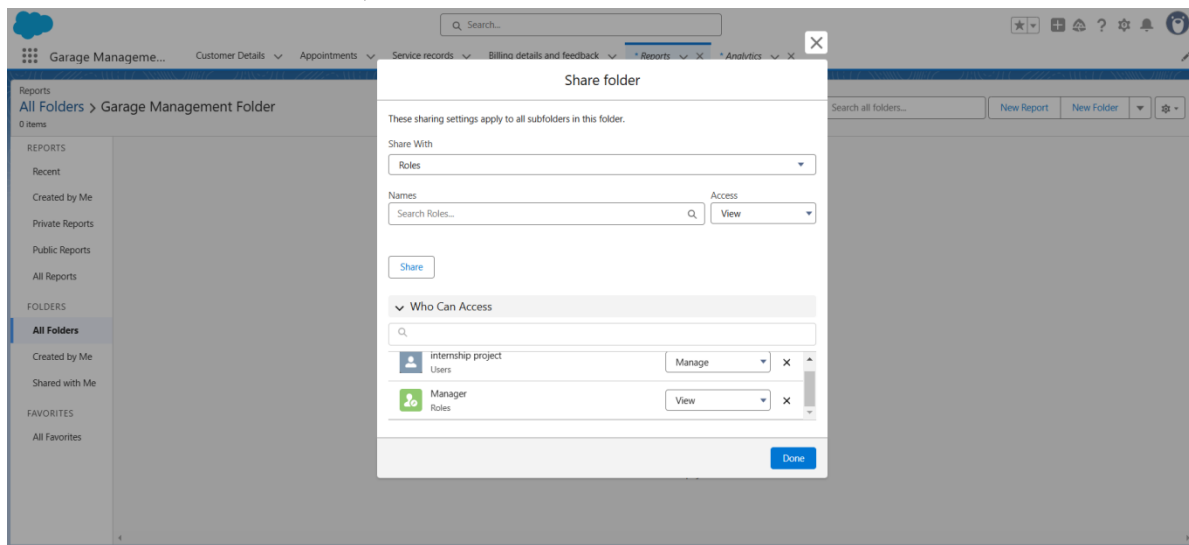
create a report folder :

2. Click on the app launcher and search for reports.
3. Click on the report tab, click on new folder.
4. Give the Folder label as “Laptop Rentals Folder”, Folder unique name will be auto populated.
5. Click save.



Sharing a report folder :

1. Go to the app >> click on the reports tab.
2. Click on the All folder , click on the Drop down arrow for Laptop Rentals folder, and Click on share.
3. Select the share with as “another Person”, in name field search for “Owner”, give “Agent” as access for that role.
4. Then click share, and click on Done.



Create Report Type

1. Go to setup >> type users in quick find box >> select Report Type >> click on Continue.
2. Click on new custom report type.
3. Select the Primary object as “ Consumer details” .
4. Give the Report type Label as “ Total Laptops”
5. Report type Name is autopopulated.
6. Keep the Description as same.
7. Select Store in Category as “ other Reports ”
8. Select the deployment status as “ Deployed ”, click on Next.
9. now , Click on Related object box.
10. Click on Select Object, choose Laptop Booking Object as shown in fig.
11. Again Click to relate another object.
12. And select the related object as “ Total Laptops”.
13. Repeat the process and select the related object as “ Billing Process”.
14. And click on save.

The screenshot shows the Salesforce Setup interface. On the left, the navigation menu is expanded to 'Reports & Dashboards' > 'Report Types'. The main content area is titled 'Customer Details' and contains the following fields:

- * Display Label:** Service information
- * API Name:** Service_information
- * Description:** Service information (Note: Description will be visible to users who create reports.)
- * Store in Category:** Other Reports

Below these fields is the 'Set Availability' section, which includes a note: 'An in-development report type is visible only to users with the Manage Custom Report Types permission. A deployed report type is available to all users.' The 'Status' is set to 'Deployed' (indicated by a blue radio button).

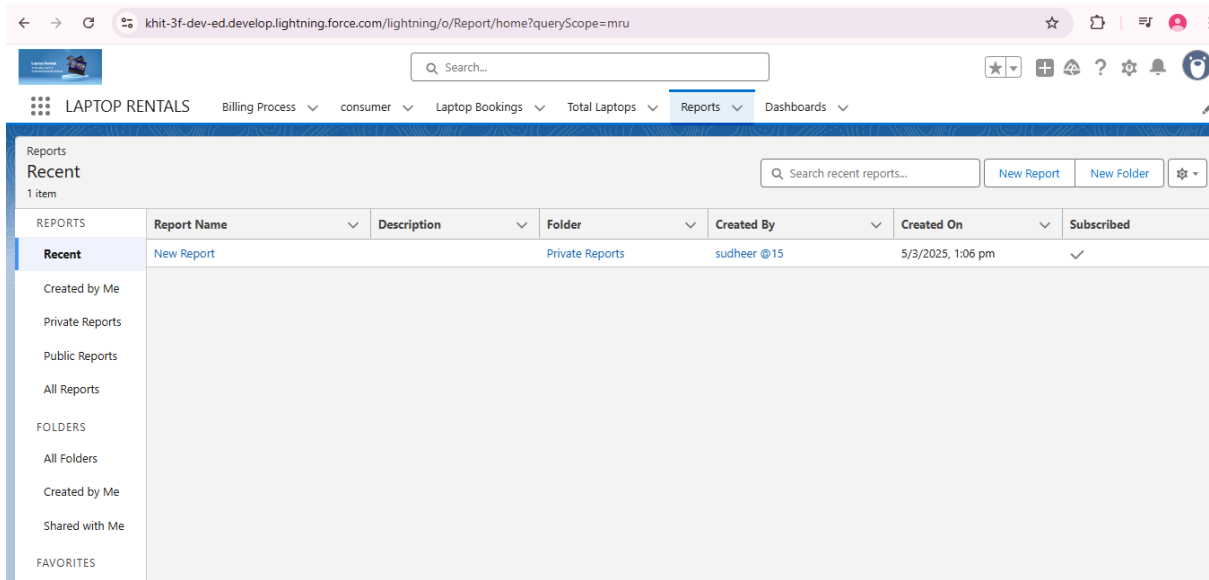
At the bottom right, there are 'Cancel' and 'Next' buttons.

Create Report

Note : Before creating report, create latest “10” records in every object.

Try to fill every field in each record for better experience.

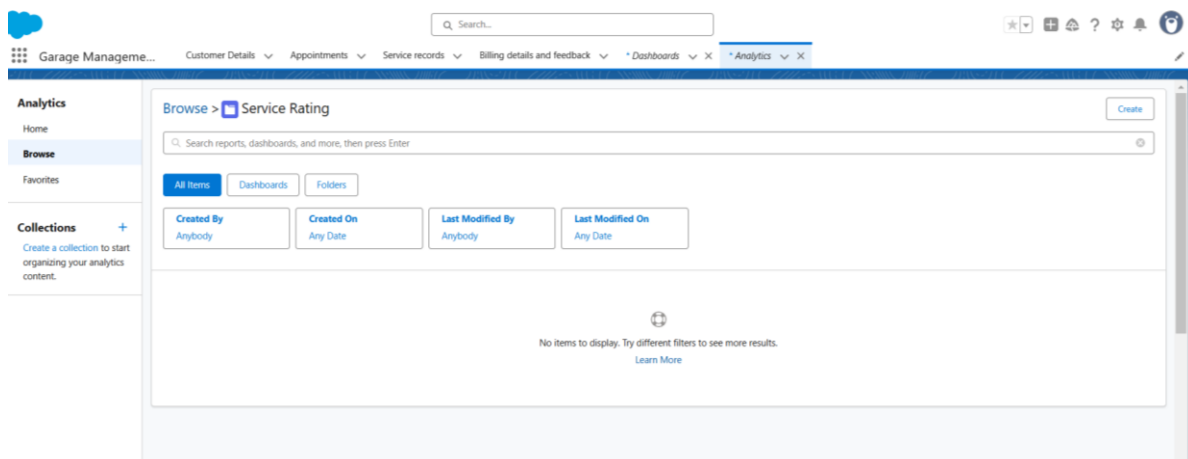
1. Go to the app >> click on the reports tab
2. Click New Report.
3. Select the Category as other reports, search for Service Information, select that report, click on it. And click on start report.
2. Create a simple tabular report
3. Add fields from left pane, make sure that Amount field will be selected.
4. Click the Amount column drop down and select bucket list



Milestone16 :Dashboard

Create Dashboard Folder :

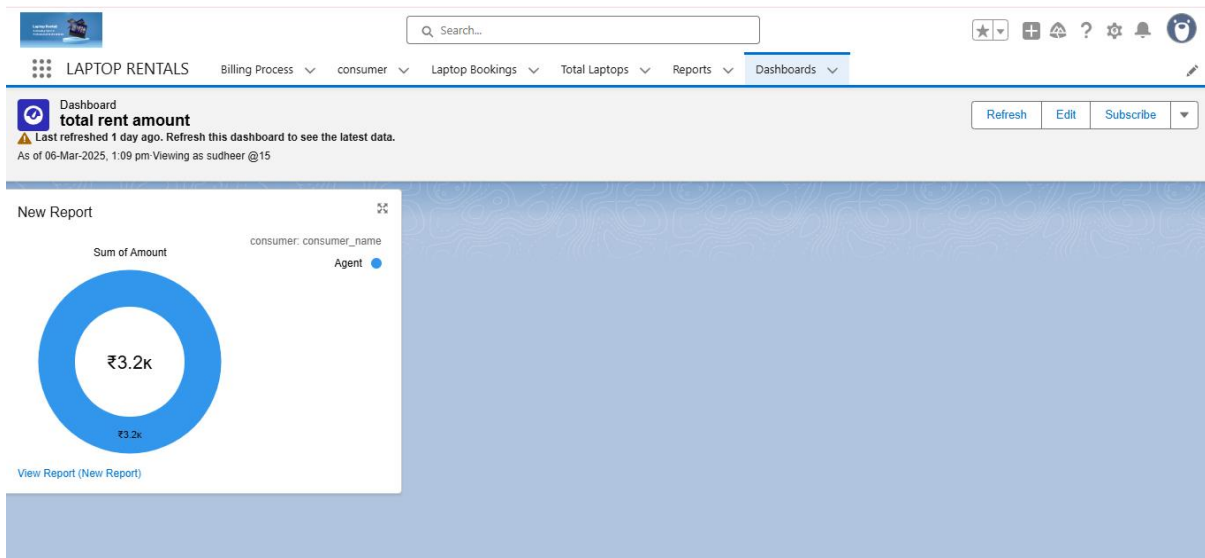
1. Click on the app launcher and search for dashboard.
2. Click on dashboard tab.
3. Click new folder, give the folder label as “ Service Rating dashboard”.
4. Folder unique name will be auto populated.
5. Click save.
6. Follow the same steps, from Reports Milestone and Activity 2, and provide the sharing settings for the folder that was just created.



Create Dashboard

1. Go to the app >> click on the Dashboards tabs.
2. Give a Name and select the folder that created, and click on create.
3. Select add component.
4. Select a Report and click on select.
5. Select the Line Chart. Change the theme.

6. Click Add then click on Save and then click on Done.
7. Preview is shown below.
8. After that Click on Subscribe on top right.
9. Set the Frequency as “ weekly ”.
10. Set a day as monday.
11. And Click on save.



Conclusion:-

The CRM application for laptop rentals developed through Salesforce has successfully addressed the core requirements of managing rental operations efficiently. By leveraging Salesforce's powerful tools, we were able to streamline the entire rental process—from customer inquiries and contract management to invoicing and payment tracking. The implementation of automation features, such as reminders for rental due dates and automated invoicing, ensures that the workflow remains smooth and reduces manual intervention.

Through robust customer relationship management, the application enhances communication and provides a 360-degree view of the customer, helping to tailor services and improve customer satisfaction. Additionally, the reporting and analytics features allow for informed decision-making, giving insights into inventory utilization, rental trends, and customer behavior.

Overall, the CRM application for laptop rentals via Salesforce has proven to be an effective solution for optimizing operations, improving customer engagement, and ensuring the business remains competitive and efficient in the growing rental market. The system is scalable and flexible, with the potential to accommodate future business needs and expansion.