A CRM APPLICATION FOR LAPTOP RENTALS

1. Project Overview

The Laptop Rentals CRM Application is a comprehensive solution for managing and simplifying laptop rental operations. It enables daily tracking and reporting on available laptops, rental bookings, consumer information, and billing processes, which are then communicated to the management. This CRM leverages customer relationship management to enhance customer engagement, streamline operations, and improve efficiency in the laptop rental business. The project aims to deliver a user-friendly application that meets the specific operational needs of a laptop rental company.

2. Objectives

Business Goals: The Laptop Rentals CRM Application will automate rental operations and revenue reporting, offering insights into performance and customer preferences. It will help forecast demand, streamline resource allocation, and optimize inventory management.

Specific Outcomes: The CRM will track rental trends, improve operational efficiency, and support better decision-making through automated reporting and demand forecasting.

3. Salesforce Key Featuresand Concepts Utilized

- **Reporting and Dashboards**
  - **Rental Activity Reports**: Generates insights on daily laptop rentals and returns.
  - **Revenue Reports:** Provides information on daily revenue from laptop rentals.
  - **Customer Analytics:** Tracks popular laptop models and top customers.
  - **Inventory Management:** Assists in planning and managing laptop inventory.

- **Rollup Summary Field**
  - **Purpose:** Aggregates data from child to parent objects in a master-detail relationship and includes COUNT and SUM functions.

- **Cross-Object Formula Field**
  - **Purpose:** References fields across objects.
  - **Function:** Calculates total rental fees by multiplying rental duration and price per day.
- **Validation Rules**
  - **Purpose:** Ensures data accuracy through input validation.
  - **Is Blank Formula:** Checks if required fields are blank and displays an error if true.
- **Permission Sets**
  - **Organization-Wide Defaults (OWD):** Sets baseline access levels for records.
  - **Roles and Access:**
    - **Owner:** Views records of all customers and rental agreements.
    - **Agent:** Accesses assigned rental agreements and customer information.

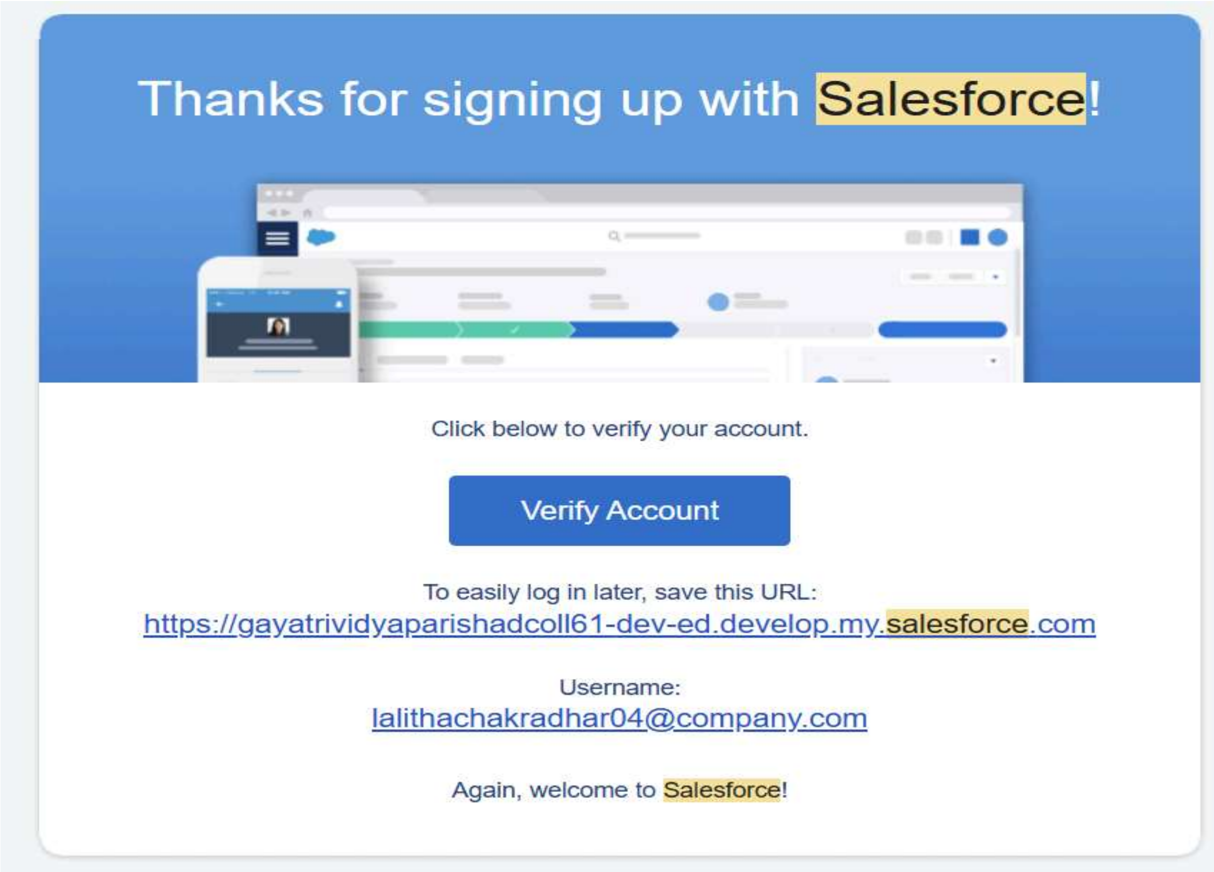
4. Detailed Steps to SolutionDesign

1. Salesforce Setup: Laying the Foundation for Your CRM

➤ **Purpose:** Establish a Salesforce environment as the foundation for your CRM.

➤ **Process:**

- Create Your Developer Account: Start with the Salesforce Developer Sign-Up.
- Go to https://developer.salesforce.com/signup.
- On the sign-up form, enter the following details:
  1. **First name & Last name**
  2. **Email**
  3. **Role:** Developer
  4. **Company:** College Name
  5. **Country:** India
  6. **Postal Code:** pin code
  7. **Username:** Should be a combination of your name and company. This does not need to be an actual email id; you can use anything in the format: username@organization.com.
- Click on **Sign me up** after filling in these details.
- Activate: Confirm your registration email and log in to complete setup.



2. Object Creation: Building the Data Structure

➤ **Purpose:** Salesforce objects are database tables that permit you to store data specific to your organization. There are two types of Salesforce objects:

- **Standard Objects:** Provided by Salesforce (e.g., Users, Contracts).
- **Custom Objects:** Created by users to store information unique to their organization.

➤ ➤ **Process:**

- Click on the gear icon ( ) and then click **Setup**.

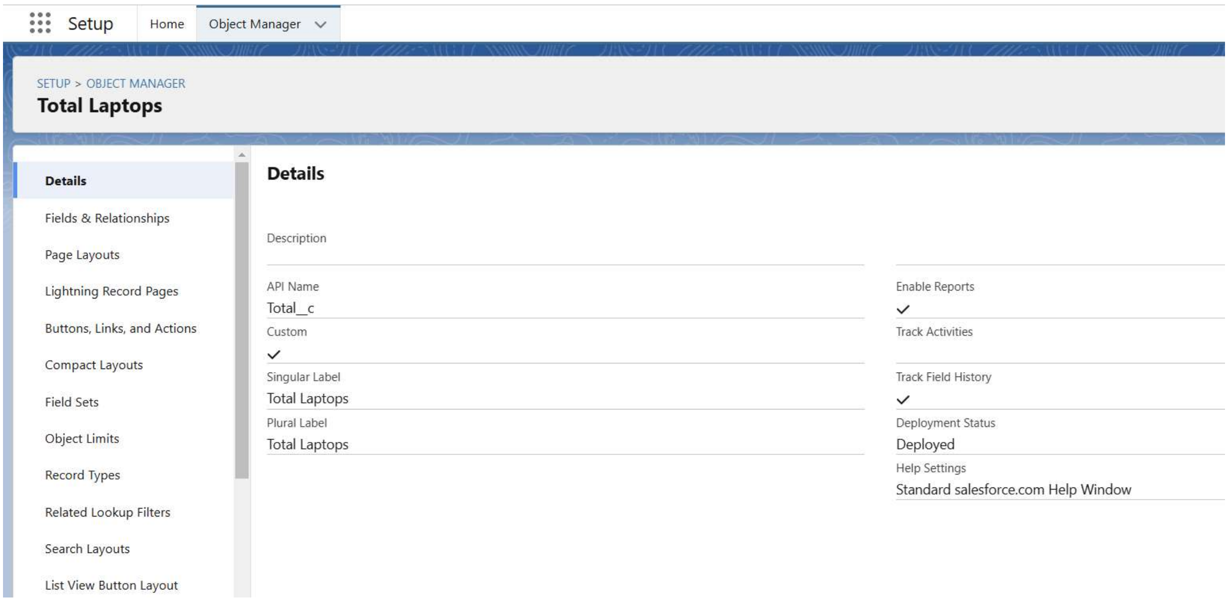
Creating a Custom Object

- **Access Object Manager:** From the Setup page, click on **Object Manager**.

1. **Create Total Laptops Object:**
   a. Click on **Create** and select **Custom Object**.
   b. **Enter the following details:**

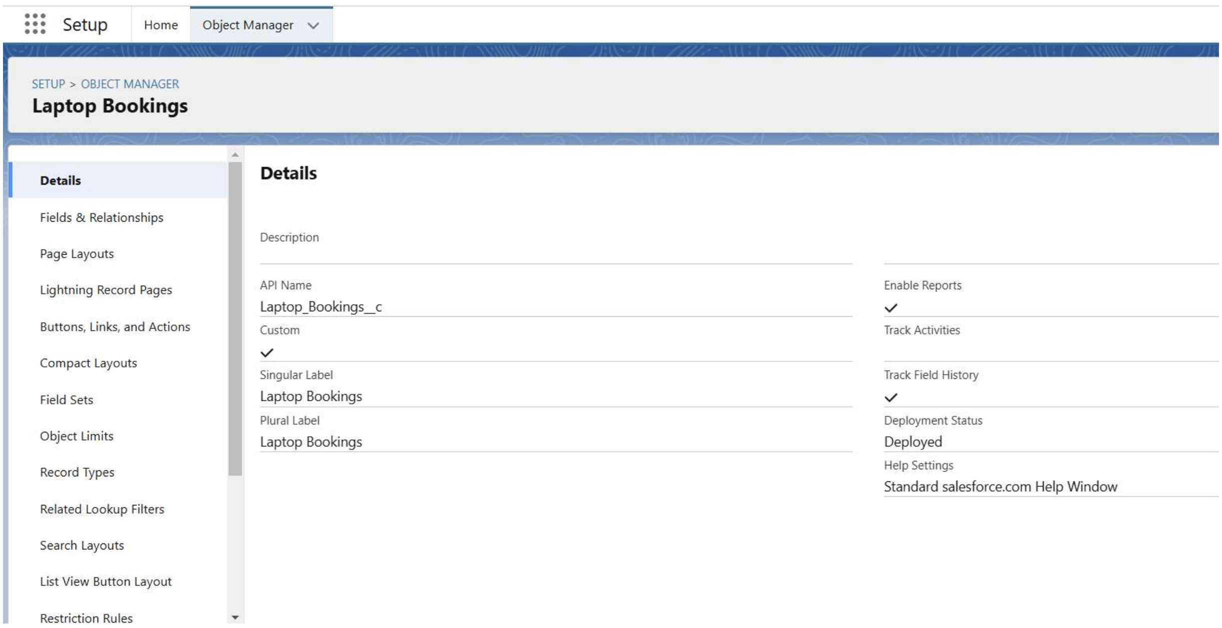
i. Label Name: Total Laptops
ii. Plural Label Name: Total Laptops
iii. Record Name Label: Total Laptops
iv. Data Type: Text

c. Click on **Allow Reports**, **Allow Search**, and **Track Field History**.
d. Click **Save**.

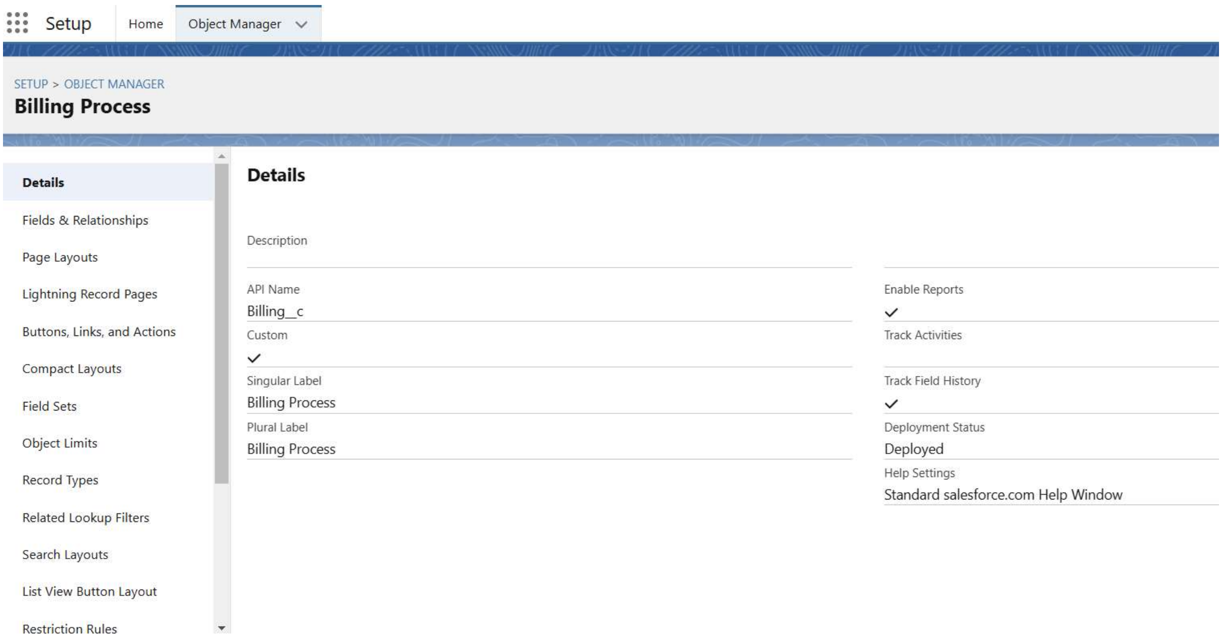


2. **Create Consumer Object:**
   a. Click on **Create** and select **Custom Object**.
   b. **Enter the following details:**
      i. Label Name: Consumer
      ii. Plural Label Name: Consumer
      iii. Record Name Label: consumer_name
      iv. Data Type: Name
   c. Click on **Allow Reports**, **Allow Search**, and **Track Field History**.
   d. Click **Save**.

3. **Create Laptop Bookings Object:**
   a. Click on **Create** and select **Custom Object**.
   b. **Enter the following details:**
      i. Label Name: Laptop Bookings
      ii. Plural Label Name: Laptop Bookings
      iii. Record Name Label: Laptop Bookings
      iv. Data Type: Name
   c. Click on **Allow Reports**, **Allow Search**, and **Track Field History**.
   d. Click **Save**.



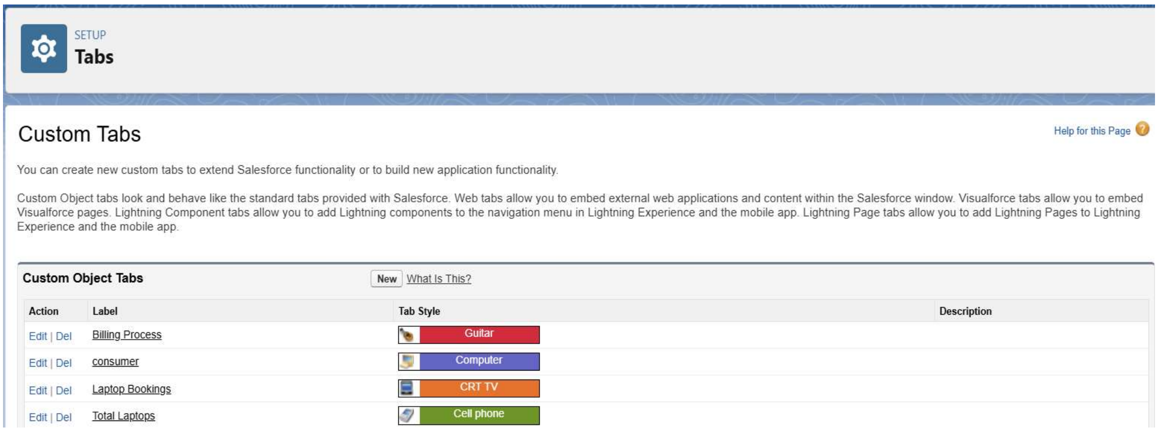
4. **Create Billing Process Object:**
    a. Click on **Create** and select **Custom Object**.
    b. **Enter the following details:**
        i. Label Name: Billing Process
        ii. Plural Label Name: Billing Process
        iii. Record Name Label: Billing Process Name
        iv. Data Type: Name
    c. Click on **Allow Reports**, **Allow Search**, and **Track Field History**.
    d. Click **Save**.



3. Tabs: Creating Easy Navigation

- **Purpose:** Organize custom objects with tabs to streamline navigation.
- **Process:**
    - Add Custom Tabs: Setup > Tabs > Custom Object Tabs > New.
    - 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 .
    - Make sure that the Append tab to user's existing personal customizations is checked.
    - Click save.
    - Repeat: create the Tabs for the remaining Objects, they are “consumer,

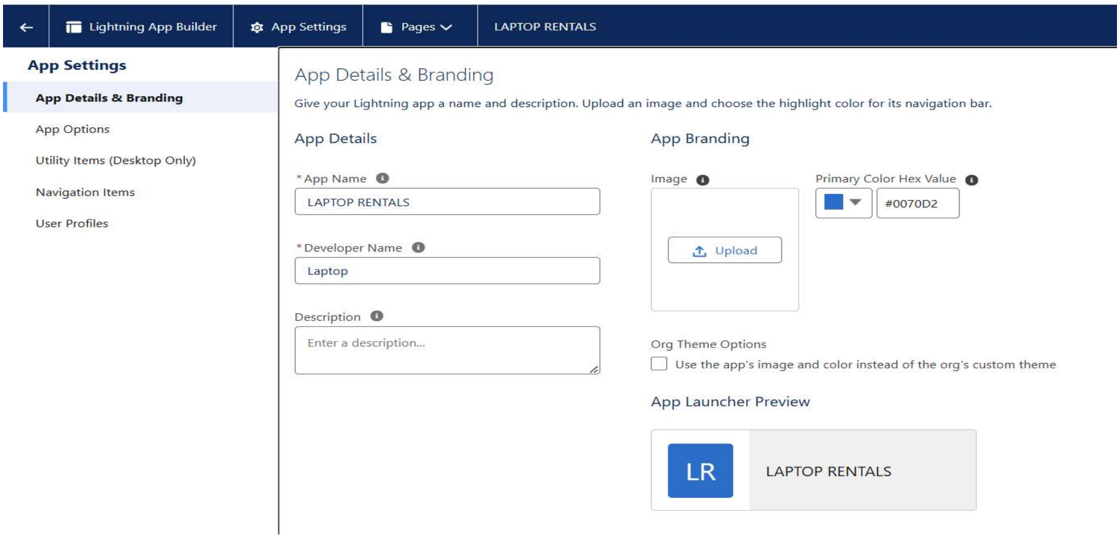
Laptop Booking, Billing process". Follow the same steps as mentioned above for Total Laptops.



4. The Lightning App: Centralizing the CRM Workspace

- ➤ **Purpose:** Bundle CRM components in one Lightning App for efficiency.
- ➤ **Process:**

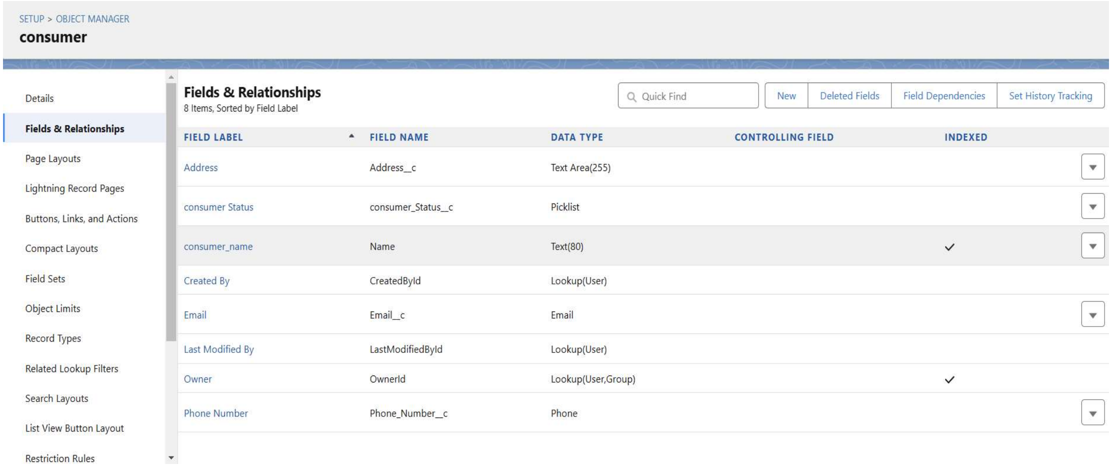
  - Go to setup page >> search "app manager" in quick find >> select "app manager" >> click on New lightning App.
  - Fill the app name in app details as LAPTOP RENTALS >>Next >> (App option page) keep it as default >> Next >> (Utility Items) keep it as default >> Next.
  - Upload a photo that is related to your app.



- To Add Navigation Items: Select the items (Total Laptops, consumers, Laptop Booking, Billing Process) from the search bar and move it using the arrow button >> Next.
- To Add User Profiles: Search profiles (System administrator) in the search bar >> click on the arrow button >> save & finish.

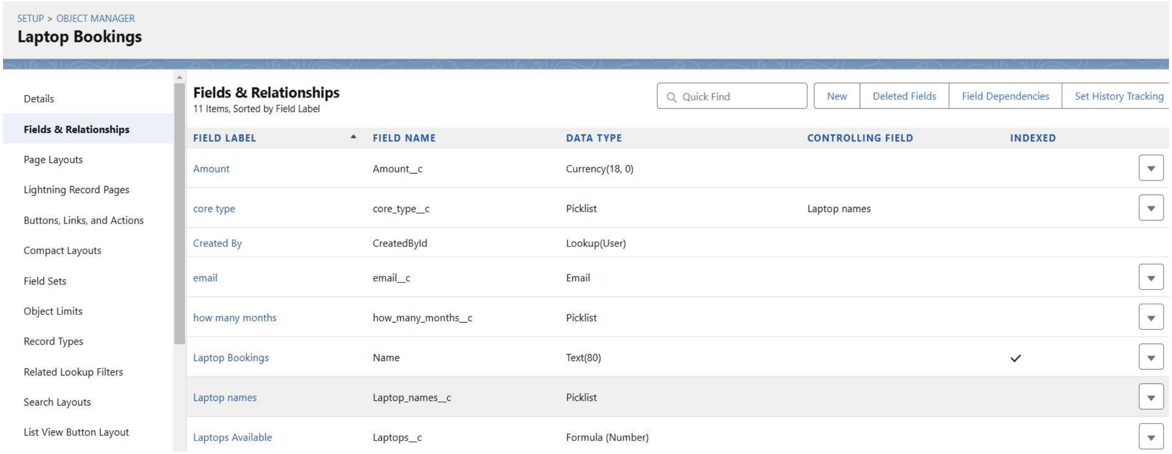
5. Fields & Relationships: Defining Data Points and Connections

- **Purpose:** Add essential data fields and relationships between objects.
- **Process:**
  - Consumer Object: In Object Manager > Consumer > Fields & Relationships, add fields like Name, Email, and Phone Number.



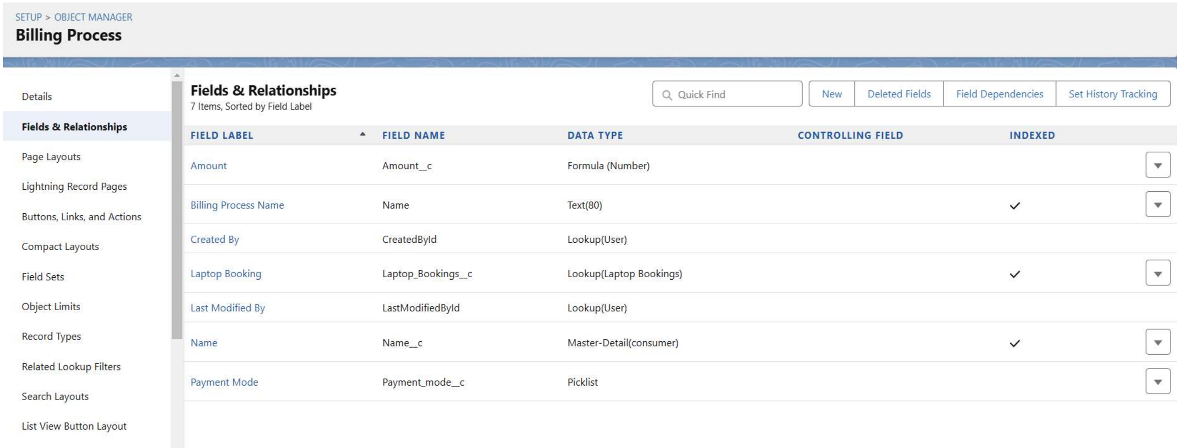
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Text Area(255)		
consumer Status	consumer_Status__c	Picklist		
consumer_name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)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

  - Laptop Bookings: Define fields like Amount, Core Type, email, how many months, laptop Bookings, Laptop Names, Laptops Available.



FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Currency(18, 0)		
core type	core_type__c	Picklist	Laptop names	
Created By	CreatedById	Lookup(User)		
email	email__c	Email		
how many months	how_many_months__c	Picklist		
Laptop Bookings	Name	Text(80)		✓
Laptop names	Laptop_names__c	Picklist		
Laptops Available	Laptops__c	Formula (Number)		

- Billing Process: Add fields for billing such as Billing ProcessName, Name, Payment Mode and relate to "Laptop Bookings".

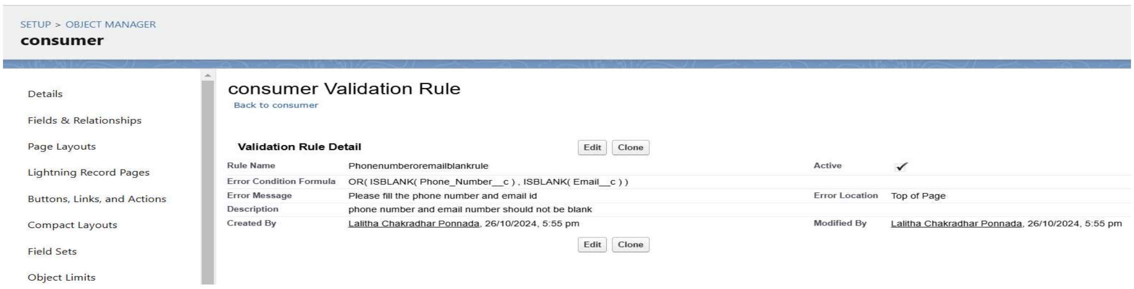


6. Validation Rules: Enforcing Data Quality Standards

➤ **Purpose:** Ensure data consistency with validation rules.

➤ **Process:**

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



7. Profiles: Setting Access Permissions

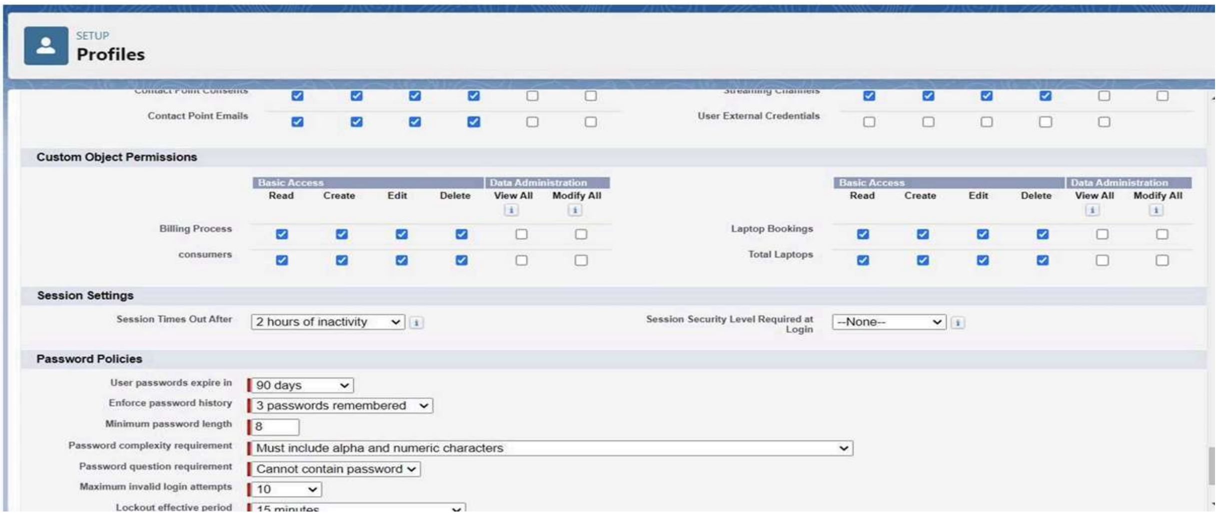
- **Purpose:** Manage what users can see and do in the CRM.
- **Process:**

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 Give access permissions for Total Laptops, consumers , Laptop Booking and Billing Process objects as mentioned in the below diagram.
- Give Access and Save it.

Agent Profile:

- Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Standard Platform User) >> enter profile name (Agent) >>Save.
- While still on the profile page, then click Edit.
- 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.
- Give access and save it.



8. Roles & Hierarchy: Managing Data Access

- **Purpose:** Define role-based record sharing and access levels.
- **Process:**

Owner Role

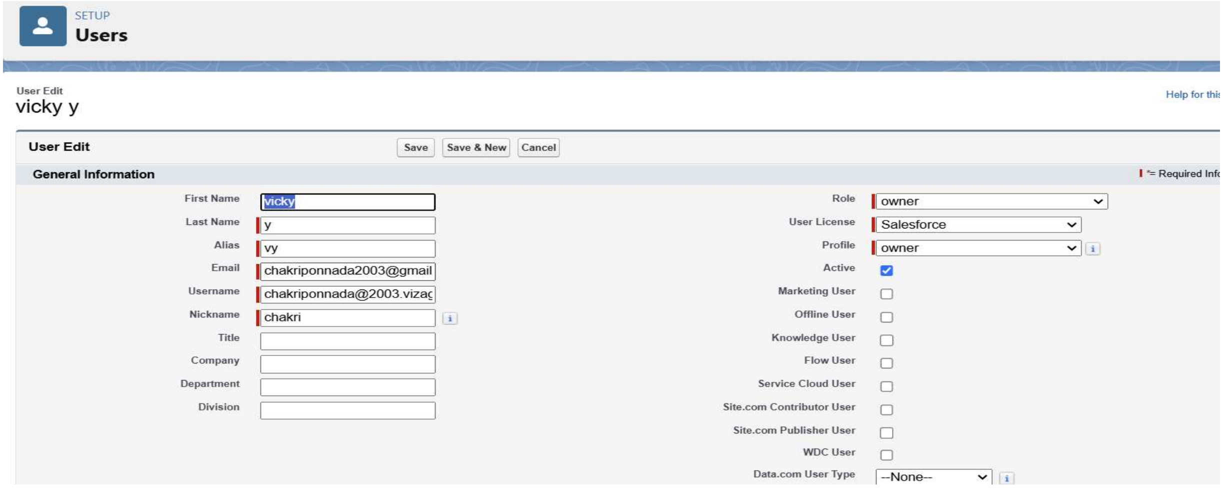
- Go to quick find >> Search for Roles >> click on set up roles.
- Click on Expand All and click on add role under whom this role works.
- Give Label as “owner” and Role name gets auto populated. Then click on Save.
- Click and save it.

Agent Role

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

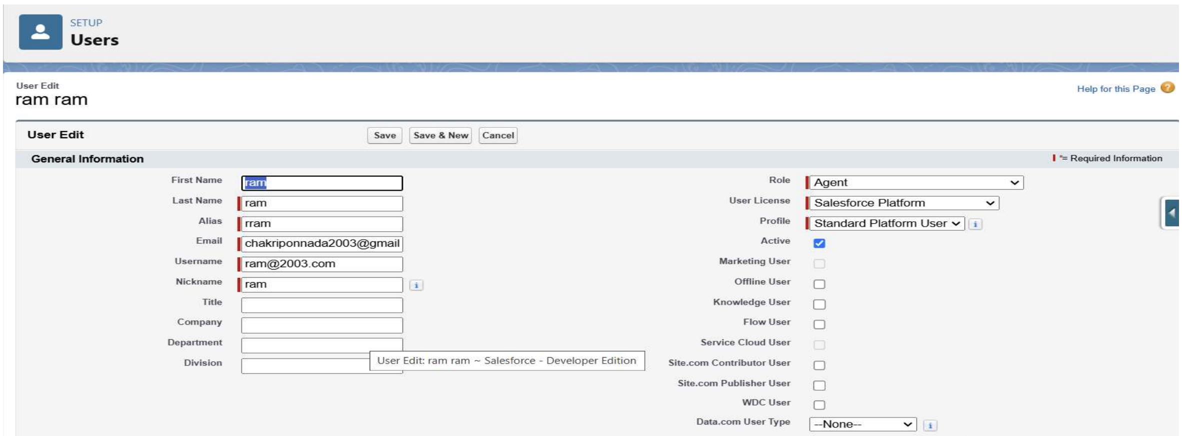
9. Users: Adding Team Members to the CRM

- **Purpose:** Add individual users to the system with assigned roles and permissions.
- **Process:**
  - 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.



Creating another users

- Go to setup -type users in quick find box - select users -click New user.
- Fill in the fields
    - First Name : ram
    - Last Name : ram
    - 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 : Agent
    - User license : Salesforce platform
    - Profiles : standard platform user.
- Save it.

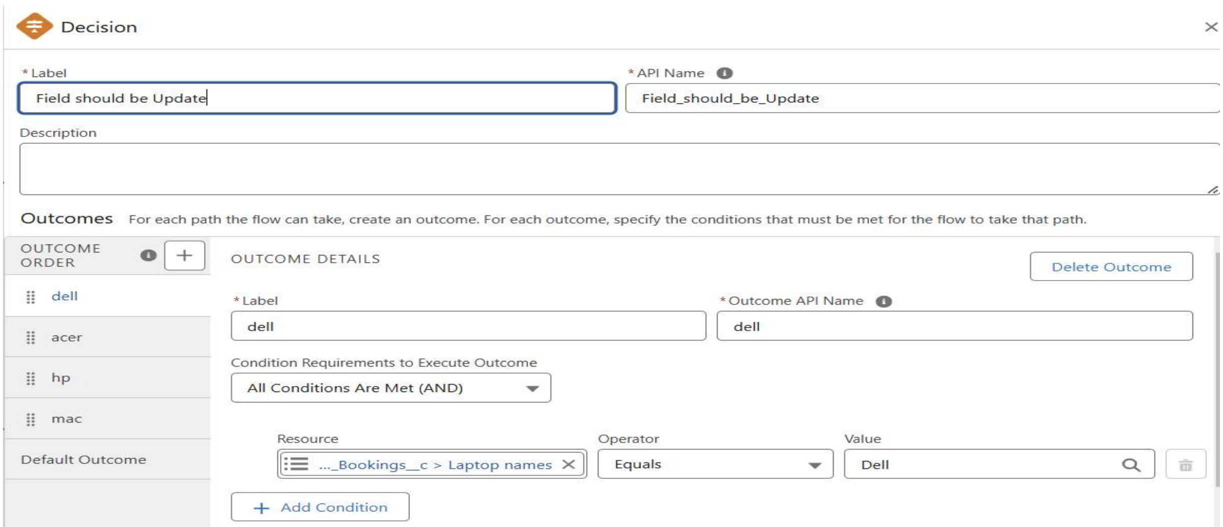


10. Flows: Automating Workflow Processes

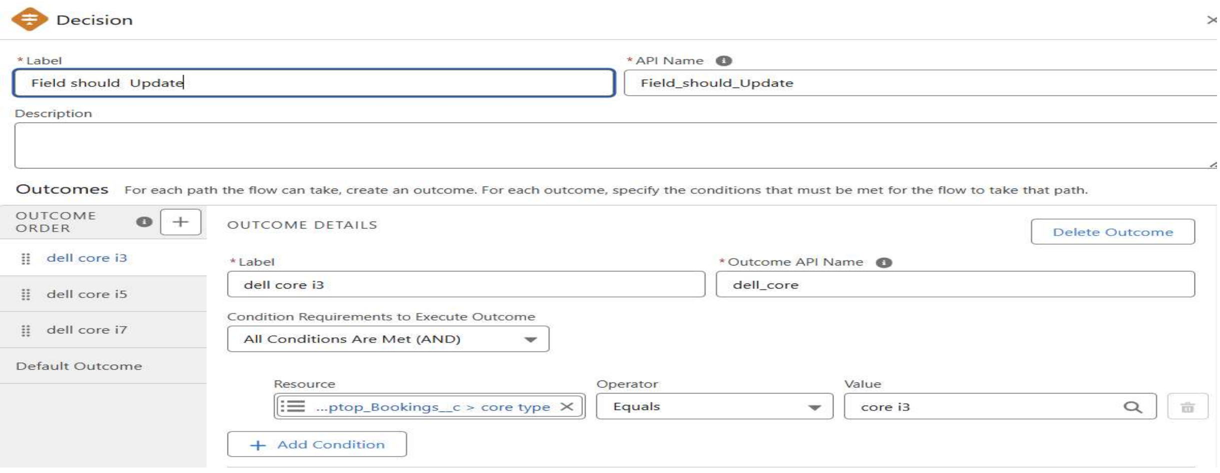
- **Purpose:** Automate CRM tasks with tailored flows for each laptop type.
- **Process:**

  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.
  - Under the Record-triggered Flow Click on “+” Symbol and In the Drop down List select the “Decision Element”.
  - Enter the Details Label: Field should be Update, API name: Gets Automatically Generated.
  - Enter the Outcome Details Label: dell , Outcome API name: Gets Automatically Generated.
    - Resource: Select Record.Laptop booking__c.
    - Operator: Select Equals.
    - Value: Select dell
    - Add the same outcome order to acer , hp,mac.

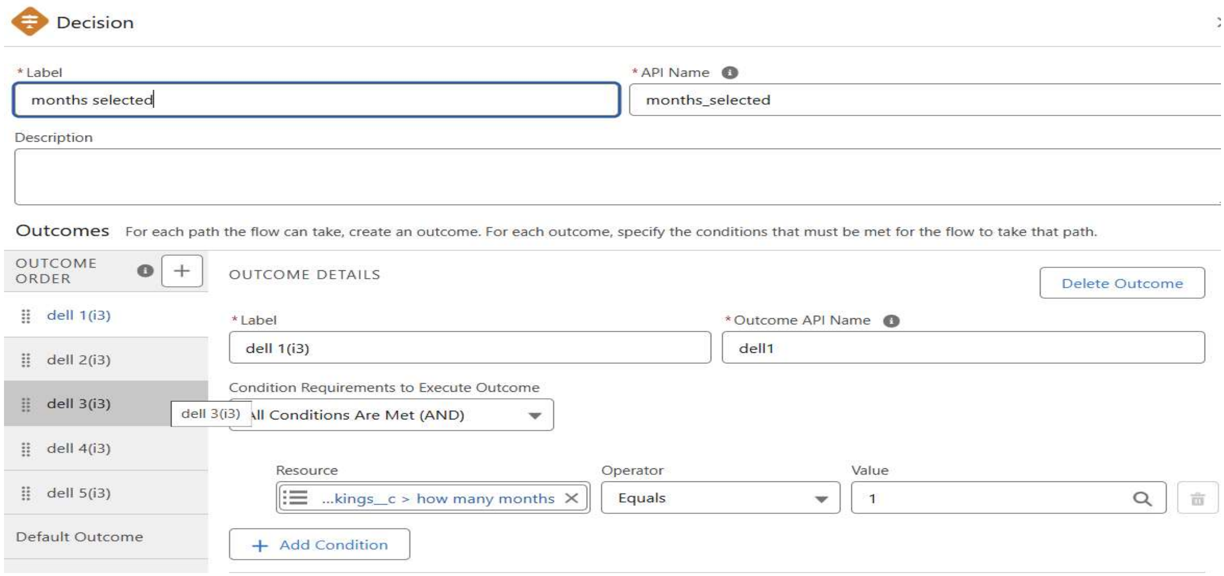


- Beside dell there is a symbol '+' click on that.
- Again select decision
- Enter the Details Label: Field should Update(any one u want), API name: Gets Automatically Generated.
  - Select the Outcome Details Label: dell core i3 , Outcome API name: Gets Automatically Generated.
    - Resource: Select Record.core type.
    - Operator: Select Equals.
    - Value: Select core i3.
    - Then again click the symbol '+' outcome details
  - select the Outcome '+' Details Label: dell core i5 , Outcome API name: Gets Automatically Generated.
    - Resource: Select Record.core type.
    - Operator: Select Equals.
    - Value: Select core i5.
    - Then again click the symbol'+' outcome details
  - Enter the Outcome Details Label: dell core i7 , Outcome API name: Gets Automatically Generated.
    - Resource: Select Record.core type.
    - Operator: Select Equals.
    - Value: Select core i7.
  - Click done.



Go to the flow page select ‘+’ after core i3 then again select the decision.

- Enter the Details Label: months selected , API name: Gets Automatically Generated.
- Enter the Outcome Details Label: dell 1(i3) , Outcome API name: Gets Automatically Generated.
    - Resource: Select Record.how many months.
    - Operator: Select Equals.
    - Value: 1.
- Enter the Outcome Details Label: dell 2(i3) , Outcome API name: Gets Automatically Generated.
    - Resource: Select Record.how many months.
    - Operator: Select Equals.
    - Value: Select 2..
- Click ‘+’ outcome details
- Enter the Outcome Details Label: dell 3(i3) , Outcome API name: Gets Automatically Generated.
    - Resource: Select Record.how many months.
    - Operator: Select Equals.
    - Value: Select 3..
- Click ‘+’ outcome details
- Enter the Outcome Details Label: dell 4(i3) , Outcome API name: Gets Automatically Generated.
    - Resource: Select Record.how many months.
    - Operator: Select Equals.
    - Value: Select 4.
- Click ‘+’ outcome details
- Enter the Outcome Details Label: dell 5(i3) , Outcome API name: Gets Automatically Generated.
    - Resource: Select Record.how many months.
    - Operator: Select Equals.
    - Value: Select 5.



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- Click on '+' then select update records
- Enter the Details Label: one month of dell i3 rate , API name: Gets Automatically Generated.
- 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 for all these finally
- Click done.
- Enter the Details Label: months selected , API name: Gets Automatically Generated.
- Enter the Outcome Details Label: dell 1(i7) , Outcome API name: Gets Automatically Generated.
  - Resource: Select Record.how many months.
  - Operator: Select Equals.
  - Value: 1.
- Enter the Outcome Details Label: dell 2(i7) , Outcome API name: Gets Automatically Generated.
  - Resource: Select Record.how many months.
  - Operator: Select Equals.
  - Value: Select 2.
- Click '+' outcome details

- Enter the Outcome Details Label: dell 3(i7) , Outcome API name: Gets Automatically Generated.
  - Resource: Select Record.how many months.
  - Operator: Select Equals.
  - Value: Select 3.
- Click '+' outcome details
- Enter the Outcome Details Label: dell 4(i7) , Outcome API name: Gets Automatically Generated.
  - Resource: Select Record.how many months.
  - Operator: Select Equals.
  - Value: Select 4.
- Click '+' outcome details
- Enter the Outcome Details Label: dell 5(i7) , Outcome API name: Gets Automatically Generated.
  - Resource: Select Record.how many months.
  - Operator: Select Equals.
  - Value: Select 5.
- After dell 1(i7) there is '+' symbol like dell 2(i7),dell 3(i7),dell 4(i7),dell 5(i7).
- Click on '+' then select update records
- Enter the Details Label: one month of dell i5 rate , API name: Gets Automatically Generated.
- Field:**-** Amount__c , value:**-** for dell 1(i7)**-**2000, dell 2(i7)**-**4000, dell 3(i7)**-**6000, dell 4(i7)**-**8000, dell 5(i7)**-**10000. Follow for all these finally
- Click done.

Create a Flow on Acer laptop

- Go to the flow page.
- Beside **Acer**, locate the '+' symbol and click on it.
- Select **Decision**:
  - Details Label: Field is Update
  - API Name: Gets Automatically Generated

    - Outcome Details Label: Acer core i3
    - Outcome API Name: Gets Automatically Generated
    - Resource: Select Record.core type
    - Operator: Equals
    - Value: Select core i3
- Go to the flow page again.
- Beside **Dell**, locate the ‘+’ symbol and click on it.
- Select **Decision**:
    - Details Label: months selected
    - API Name: Gets Automatically Generated
- Enter Outcome Details:
    - Outcome Details Label: Acer 1(i3)
    - Outcome API Name: Gets Automatically Generated
    - Resource: Select Record.how many months
    - Operator: Equals
    - Value: 1
    - Outcome Details Label: Acer 2(i3)
    - Outcome API Name: Gets Automatically Generated
    - Resource: Select Record.how many months
    - Operator: Equals
    - Value: 2
    - Click ‘+’ to add another outcome.
    - Outcome Details Label: Acer 3(i3)
    - Outcome API Name: Gets Automatically Generated
    - Resource: Select Record.how many months
    - Operator: Equals
    - Value: 3
    - Click ‘+’ to add another outcome.
    - Outcome Details Label: Acer 4(i3)
    - Outcome API Name: Gets Automatically Generated
    - Resource: Select Record.how many months
    - Operator: Equals
    - Value: 4
    - Click ‘+’ to add another outcome.
    - Outcome Details Label: Acer 5(i3)
    - Outcome API Name: Gets Automatically Generated
    - Resource: Select Record.how many months

        - Operator: Equals
        - Value: 5
    - Update records for each outcome (Acer 1(i3) through Acer 5(i3)):
        - Click '+' beside each outcome, then select **Update Records**.
        - Details Label: one month of Acer i3 rate
        - API Name: Gets Automatically Generated
        - Field: Amount__c
        - Values:
            - For Acer 1(i3): 900
            - For Acer 2(i3): 1800
            - For Acer 3(i3): 2700
            - For Acer 4(i3): 3600
            - For Acer 5(i3): 4500

Create a Flow on Hp Laptop

- Go to the Flow page.
- Beside HP, locate the '+' symbol and click on it.
- Add Decision:
    - Details Label: Field is Update
    - API Name: Gets Automatically Generated
- Enter Outcome Details:
    - Outcome Details Label: HP core i5
    - Outcome API Name: Gets Automatically Generated
    - Resource: Select Record.core type
    - Operator: Equals
    - Value: HP i5
    - Go to the Flow page again.
    - Beside HP, locate the '+' symbol and click on it.
    - Add Decision:
    - Details Label: HP field should be updated
    - API Name: Gets Automatically Generated
    - Enter Outcome Details:
    - Outcome Details Label: HP 1(i5)
    - Outcome API Name: Gets Automatically Generated
    - Resource: Select Record.how many months
    - Operator: Equals
    - Value: 1

        - Outcome Details Label: HP 2(i5)
        - Outcome API Name: Gets Automatically Generated
        - Resource: Select Record.how many months
        - Operator: Equals
        - Value: 2
        - Click ‘+’ to add another outcome.
        - Outcome Details Label: HP 3(i5)
        - Outcome API Name: Gets Automatically Generated
        - Resource: Select Record.how many months
        - Operator: Equals
        - Value: 3
        - Click ‘+’ to add another outcome.
        - Outcome Details Label: HP 4(i5)
        - Outcome API Name: Gets Automatically Generated
        - Resource: Select Record.how many months
        - Operator: Equals
        - Value: 4
        - Click ‘+’ to add another outcome.
        - Outcome Details Label: HP 5(i5)
        - Outcome API Name: Gets Automatically Generated
        - Resource: Select Record.how many months
        - Operator: Equals
        - Value: 5
    - Update Records for each outcome (HP 1(i5) through HP 5(i5)):
        - Click ‘+’ beside each outcome, then select Update Records.
        - Details Label: one month of HP i5 rate
        - API Name: Gets Automatically Generated
        - Field: Amount__c
        - Values:
            - For HP 1(i5): 1700
            - For HP 2(i5): 3400
            - For HP 3(i5): 5100
            - For HP 4(i5): 6800
            - For HP 5(i5): 8500

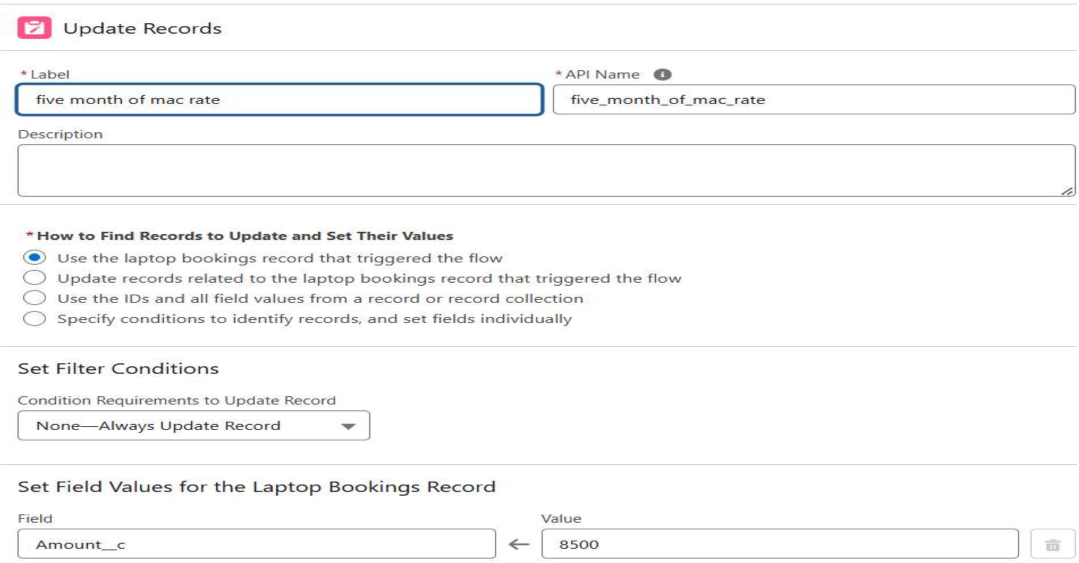
Create a Flow on Mac Laptop

- Go to the Flow page.
- Beside **Mac**, locate the ‘+’ symbol and click on it.

- Select **Decision**:
    - Details Label: mac should be Updated
    - API Name: Gets Automatically Generated
    - Outcome Details Label: mac laptop
    - Outcome API Name: Gets Automatically Generated
    - Resource: Select Record.core type
    - Operator: Equals
    - Value: Bionic Chip
- Go to the Flow page again.
- Beside **Mac**, locate the ‘+’ symbol and click on it.
- Select **Decision**:
    - Details Label: Mac months selected
    - API Name: Gets Automatically Generated
- Enter Outcome Details:
    - Outcome Details Label: mac bionic chip(1)
    - Outcome API Name: Gets Automatically Generated
    - Resource: Select Record.how many months
    - Operator: Equals
    - Value: 1
    - Outcome Details Label: mac bionic chip(2)
    - Outcome API Name: Gets Automatically Generated
    - Resource: Select Record.how many months
    - Operator: Equals
    - Value: 2
    - Click ‘+’ to add another outcome.
    - Outcome Details Label: mac bionic chip(3)
    - Outcome API Name: Gets Automatically Generated
    - Resource: Select Record.how many months
    - Operator: Equals
    - Value: 3
    - Click ‘+’ to add another outcome.
    - Outcome Details Label: mac bionic chip(4)
    - Outcome API Name: Gets Automatically Generated
    - Resource: Select Record.how many months
    - Operator: Equals
    - Value: 4
    - Click ‘+’ to add another outcome.

- Outcome Details Label: mac bionic chip(5)
- Outcome API Name: Gets Automatically Generated
- Resource: Select Record.how many months
- Operator: Equals
- Value: 5

- **Update Records** for each outcome (mac bionic chip(1) through mac bionic chip(5)):
    - Click ‘+’ beside each outcome, then select **Update Records**.
    - Details Label: one month of mac rate
    - API Name: Gets Automatically Generated
    - Field: Amount__c
    - Values:
        - For one month of mac bionic chip rate: 1700
        - For two months of mac bionic chip rate: 3400
        - For three months of mac bionic chip rate: 5100
        - For four months of mac bionic chip rate: 6800
        - For five months of mac bionic chip rate: 8500



FLOW:

- Click on **Save**.

    - Label: Laptop distributions

- API Name: Automatically Filled

- **Save the flow and activate**

11. APEX: Advanced Customization

➤ **Purpose:** Use APEX to add custom automation and business logic.

APEX LaptopBookingHandler class code :

```
public class LaptopBookingHandler {

public static void sendEmailNotification (List<Laptop_Bookings__c> lapList){

    for(Laptop_Bookings__c lap:lapList)

    {

        Messaging.SingleEmailMessage email = new Messaging.SingleEmailMessage();

            email.setToAddresses( new List<String>{lap.Email__c});

            email.setSubject('Welcome to our company');

        string body = 'Dear ' +lap.Name +', \n';

        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 to provide you with
good quality resources. \n Laptop Amount = ' + lap.Amount__c + ' \n core type =
'+lap.Core_Type__c +' \n Laptop type = '+lap.Laptop_Names__c;

        email.setPlainTextBody(body);

            Messaging.sendEmail(new List<Messaging.SingleEmailMessage>{email});
    }
  }
}
```

- Class name:- LaptopBookingHandler
- API Name:- Laptop_Bookings__c(as per your org go to laptop booking object and copy from that).
- core__c (as per your org go to laptop booking object and copy from that).

- Laptop_type__c.(as per your org go to laptop booking object and copy from that).

Trigger for Email Notification: Sends email to customers upon booking
Trigger Code:

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

    if(trigger.isAfter && ( trigger.isInsert || trigger.isupdate))
    {
    LaptopBookingHandler.sendEmailNotification(trigger.new);
       }
}
```

- LaptopBooking - trigger name
- Laptop_Bookings__c -as per your org(go to laptop bookings object and copy from that object api name).

12. Reports: Data-Driven Insights at a Glance

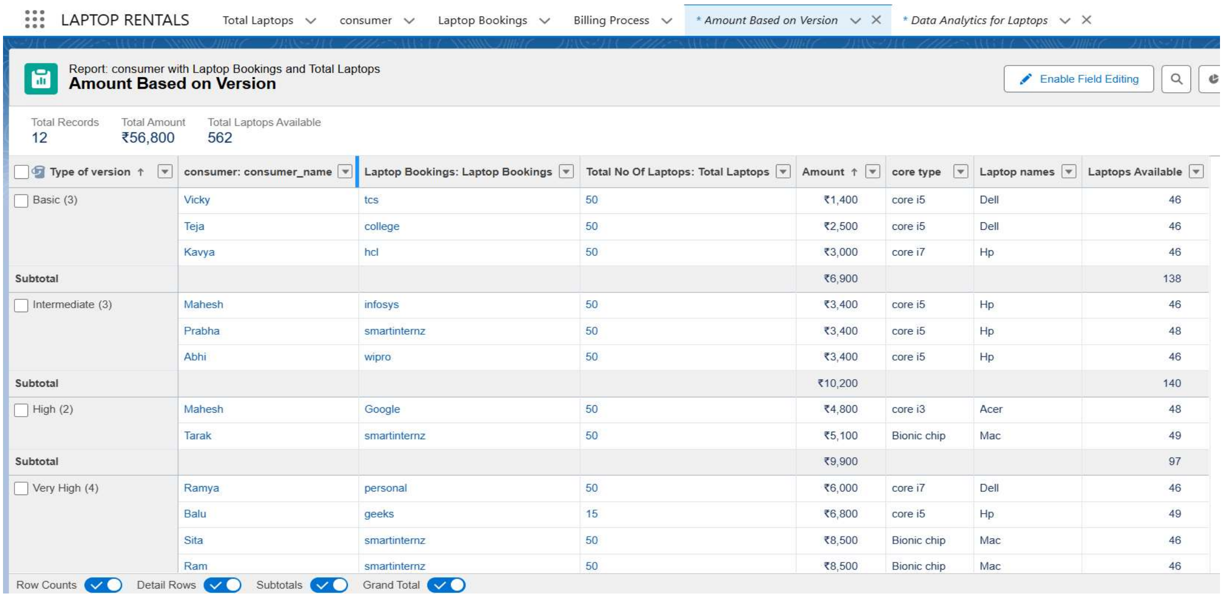
➤ **Purpose:** Use reports to gain insights into data trends and performance.
➤ **Process:**

Creating the Report

- Go to the App:
  - Click on the Reports tab.
- Click on New Report:Select Report Type:
  - Choose the report type from the category or from the report type panel.
  - Search for Consumer with Laptop Bookings and Total Laptops.
  - Click on Start Report.
- Customize Your Report:
  - Add fields from the left pane as needed.
  - Organize the fields into rows and columns according to your requirements.
- Group Rows and Columns:
  - Follow the provided image or layout to group rows and columns.
- Select Bucket List:
  - Click the column drop-down and select Bucket List and click

Apply.

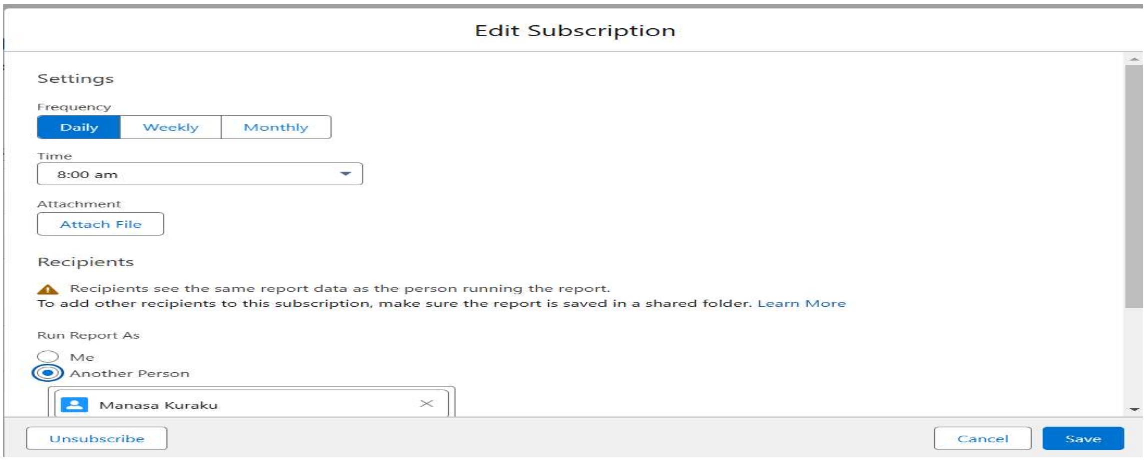
- Save or Run the Report:
  - Follow the instructions or images to either save or run the report.



Type of version	consumer: consumer_name	Laptop Bookings: Laptop Bookings	Total No Of Laptops: Total Laptops	Amount	core type	Laptop names	Laptops Available
Basic (3)	Vicky	tcs	50	₹1,400	core i5	Dell	46
	Teja	college	50	₹2,500	core i5	Dell	46
	Kavya	hcl	50	₹3,000	core i7	Hp	46
Subtotal				₹6,900			138
Intermediate (3)	Mahesh	infosys	50	₹3,400	core i5	Hp	46
	Prabha	smartinternz	50	₹3,400	core i5	Hp	48
	Abhi	wipro	50	₹3,400	core i5	Hp	46
Subtotal				₹10,200			140
High (2)	Mahesh	Google	50	₹4,800	core i3	Acer	48
	Tarak	smartinternz	50	₹5,100	Bionic chip	Mac	49
Subtotal				₹9,900			97
Very High (4)	Ramya	personal	50	₹6,000	core i7	Dell	46
	Balu	geeks	15	₹6,800	core i5	Hp	49
	Sita	smartinternz	50	₹8,500	Bionic chip	Mac	46
	Ram	smartinternz	50	₹8,500	Bionic chip	Mac	46

Sharing the Report with the Owner

- Edit Drop-Down:
  - Click the Edit drop-down menu.
  - Select the Subscribe option.
- Select Run Report As Another Person:
  - After selecting to run the report as “another person,” choose your personal account or the account of the person you want to send the email to.
- Save the Subscription



13. Dashboards: Real-Time Visualization

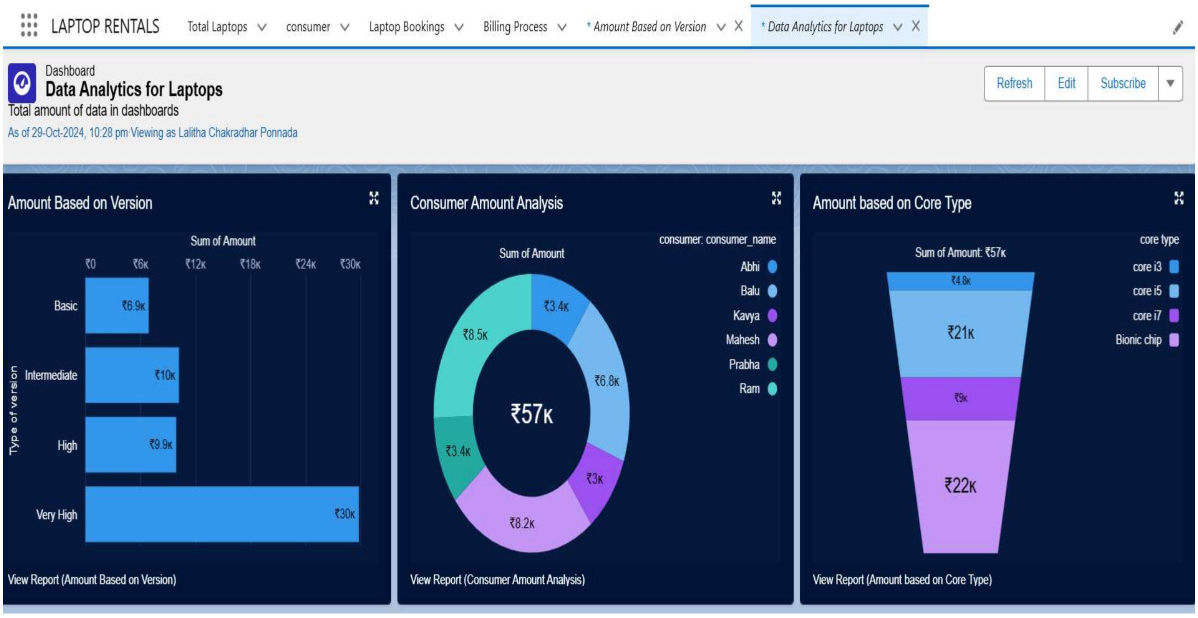
- **Purpose:** Provide visual snapshots of key metrics and trends.
- **Process:**

Creating a Dashboard Folder

- Open App Launcher: Search for Dashboard.
- Dashboard Tab: Click on the Dashboard tab.
- New Folder: Click New Folder.
- Label Folder: Name it Total Rent Amount (unique name auto-populates).
- Save Folder: Click Save.

Creating a Dashboard

- Dashboards Tab: Click on the Dashboards tab.
- New Dashboard: Name the dashboard and select the Total Rent Amount folder. Click Create.
- Add Component: Click Add Component.
- Select Report: Choose a report and click Select.
- Component Style: Choose the dark component style.
- Save Dashboard: Click Save.
- Finalize: Click Done.



5. Conclusion

The Salesforce CRM project for laptop rentals successfully established a structured environment with custom objects like Total Laptops, Consumer, Laptop Bookings, and Billing Process. Essential data fields were created, along with validation rules to ensure data integrity. User access was managed through profiles and roles, enhancing security and functionality. Automation through flows and insightful reports and dashboards enables data-driven decision-making. This setup positions the organization to efficiently manage rentals and improve customer engagement while remaining adaptable to future needs.