

A CRM APPLICATION FOR LAPTOP RENTALS

1. Introduction

The *Laptop Rental CRM Application* streamlines the process of managing laptop rentals organizations. This application provides an efficient way to track inventory, bookings, and customer interactions while generating valuable insights through reports.

Project Purpose □

The primary purpose of this project is to develop a Customer Relationship Management CRM application using the Salesforce to Streamline and automate the processes involved in the rental for laptop . The application will help laptop businesses manages their customer interaction , inventory , rental , , integrated platform that enhance customer service , drives , sales and simplifies business operations .

2. Features and Benefits

Features

- **Inventory Management:** Manage and monitor available laptops and configurations.
 - Maintain a catalog of available laptops
 - Include details such as :
 - Laptop Name: Acer , HP , Dell , Mac
 - Core Type : Core i3 , Core i5, Core i7 , Core i9 , M1, M2
 - Rental Price : Cost per unit of duration.
- **Customer Management:** Store customer details, rental history, and preferences.
- **Booking System:** Streamlined laptop booking process.
- **Reporting Tools:** Generate reports to track rentals, trends, and performance.
 - Generate Report on sales Trend customer usages and revenue.
 - Display available laptop real time.
- **Notifications:** Automatic reminders for returns or overdue rentals.
 - Send automated welcome emails to new customers .
 - Send email about the product that he purchased .

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- Send a Total sell report on a daily basis after subscribing the report.

Benefits

- Increased operational efficiency.
- Better customer service through centralized data.
- Improved decision-making with analytics and reporting.
- Simplified inventory and booking tracking.

3. Features and Benefits

The application uses the following core objects:

Custom Objects

- **Laptop Bookings**
 - Fields: Booking ID, Laptop Brand, Processor, Booking Date, Customer Name.
- **Laptops**
 - Fields: Laptop ID, Brand, Model, Processor, Availability Status,.
- **Customers**
 - Fields: Customer ID, Name, Contact Details, Rental History.

Relationship

- **Laptop Bookings is related to both Customers and Laptops through lookup fields.**

4. Setting Up The application

Step 2: Initial Data Setup

- Populate the *Laptops* object with your current inventory.

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- Add customer records in the *Customers* object.

Step 3: Create Laptop Bookings

- Navigate to the **Laptop Bookings** tab.
- Click **New** and fill in details like:
 - Customer Name.
 - Laptop Brand and Processor.
 - Booking Date and Return Date.

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5. Features and Benefits

1. Booking Creation

- A customer requests a laptop rental.
- Create a new record in the *Laptop Bookings* object.

2. Inventory Update

- The system automatically marks the selected laptop as "Unavailable."

3. Reports Generation

- Analyze booking trends, overdue rentals, and inventory performance.

6. Reporting and Analytics

Standard Reports

- **Rental Trends:** Track the number of rentals by brand or processor type.
- **Inventory Status:** View available laptops vs. rented laptops.
- **Customer Activity:** Monitor customer rental history.

Customizable Dashboards

- Create dashboards to visualize performance metrics and rental KPIs.

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