A CRM Application for LAPTOP RENTALS

1. Project Overview:

CRM Application on Laptop rentals is about delivering the items to the customers by rental purpose. It leverages the power of customer relationship management (CRM) to enhance customer experiences, optimize store operations, and improve overall efficiency. Additionally to these, we also need to do an effective CRM i.e via communicating through email with the potential customers identified.

2.Objectives

• Manage laptop rentals efficiently through a streamlined booking system.

• Enhance customer experience with personalized email notifications and offers.

• Track inventory of laptops and their availability.

• Automate billing and payment processes for laptop rentals.

• Generate reports to track rental history, financial data, and inventory insights.

• Enable custom user roles (e.g., agents and owners) for optimized access control.

3. Core Objects and Fields

3.1. **Consumer Object**

Stores customer data and tracks customer status.

• Fields:

▪ Name: (Text) Name of the consumer.

▪ Phone Number: (Phone) Customer's contact number. Validation rule ensures at least 10 digits.

▪ Email: (Email) Customer's email address.

▪ Address: (Text) Consumer's physical address.

▪ Consumer Status: (Picklist) Indicates if the consumer is a Student or Employee.

3.2. Laptop Bookings Object

Handles laptop bookings and rental details.

• Fields:

▪ Laptop Name: Name of the laptop (Values: Dell, Acer, HP, MAC).

▪ Core Type: Processor type (e.g., i3, i5, i7).

▪ Email: Consumer's email.

▪ Rental Duration: Duration of rental in months.

▪ Laptops Available: Reference to the inventory of available laptops.

3.3. Total Laptops Object

Tracks the inventory of laptops, their availability, and delivery status.

• Fields:

▪ Total Laptops: Total laptops in stock.

▪ Laptops Available: Number of laptops currently available for rent.

▪ Laptops Delivered: Laptops that are currently on rent.

3.4. Billing Process Object

Manages the billing and payment information for each booking.

• Fields:

▪ Billing Process Name: Name of the billing process.

▪ Amount: Amount to be billed for the rental.

▪ Laptop Booking: Reference to the related booking.

▪ Payment Mode: Mode of payment (Values: Credit Card, Debit Card, Cash).

4. Validation Rules

• **Phone Number Validation (Consumer Object):** To ensure that both Phone Number and Email are not blank, the original rule will

5. User Profiles and Roles

5.1. Profiles

• Agent Profile: Limited access to manage laptop bookings and customer information. Can create, update, and track rentals.

• Owner Profile: Full access to manage all CRM functions, including inventory, bookings, billing, and reports.

5.2. Users

• **Agent Users:** Assigned to the Agent profile, agents handle customer inquiries and bookings.

• Owner Users: Assigned to the Owner profile, owners oversee inventory management, billing processes, and reporting.

6. Automation with Flows

Custom flows have been created to automate the laptop booking processes based on the type of laptop. These flows ensure that agents handle bookings efficiently and that inventory is updated in real-time.

7. Apex Triggers and Classes

7.1. Apex Class: LaptopBookingHandler

This class sends email notifications to customers when they book a laptop.

7.2. Apex Trigger: LaptopBooking

The trigger sends email notifications when a laptop booking is created or updated.

8. Reports:

Report Name: Report1

▪ What it does: Shows how much money was earned from laptops rented by processor type (Core i3, Core i5, Core i7, Bionic chip).

▪ Helps see which types of laptops are rented the most and bring in the most money.

9. Dashboards:

Dashboard Name: Data Analytics of Laptops

▪ What it shows: A donut chart showing the total earnings from different types of laptops (by core type).

▪ Gives a quick overview of which laptops are earning the most and how much is being made from each type.

10. Conclusion

This CRM application effectively manages laptop rentals, enhances customer engagement

through email notifications, and automates business processes using Salesforce's robust features. The system provides actionable insights through detailed reports and dashboards, and roles such as agents and owners ensure streamlined business operations.