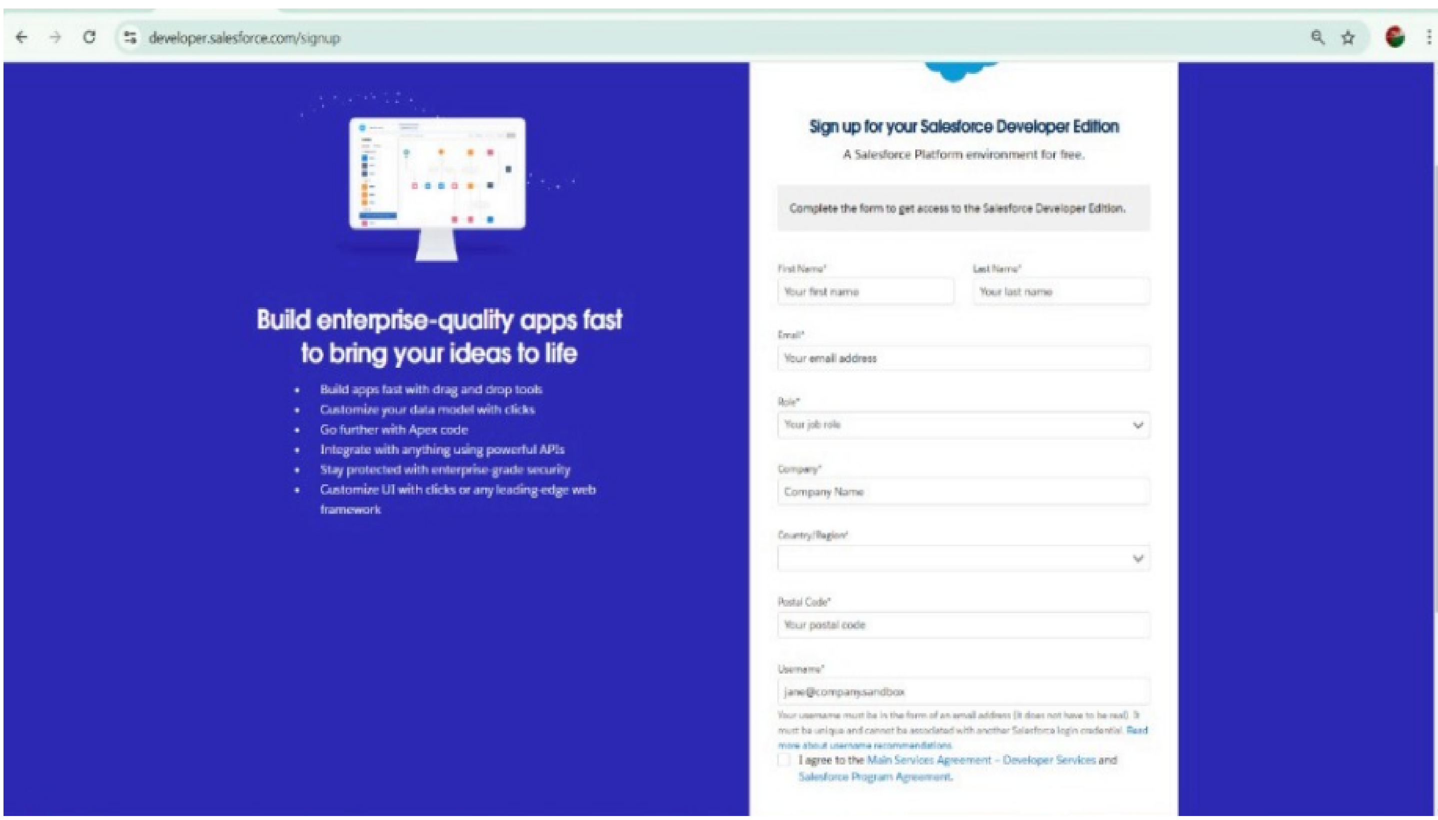
A CRM APPLICATION FOR LAPTOP RENTALS CRM

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.

Salesforce:

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



Object Creation:

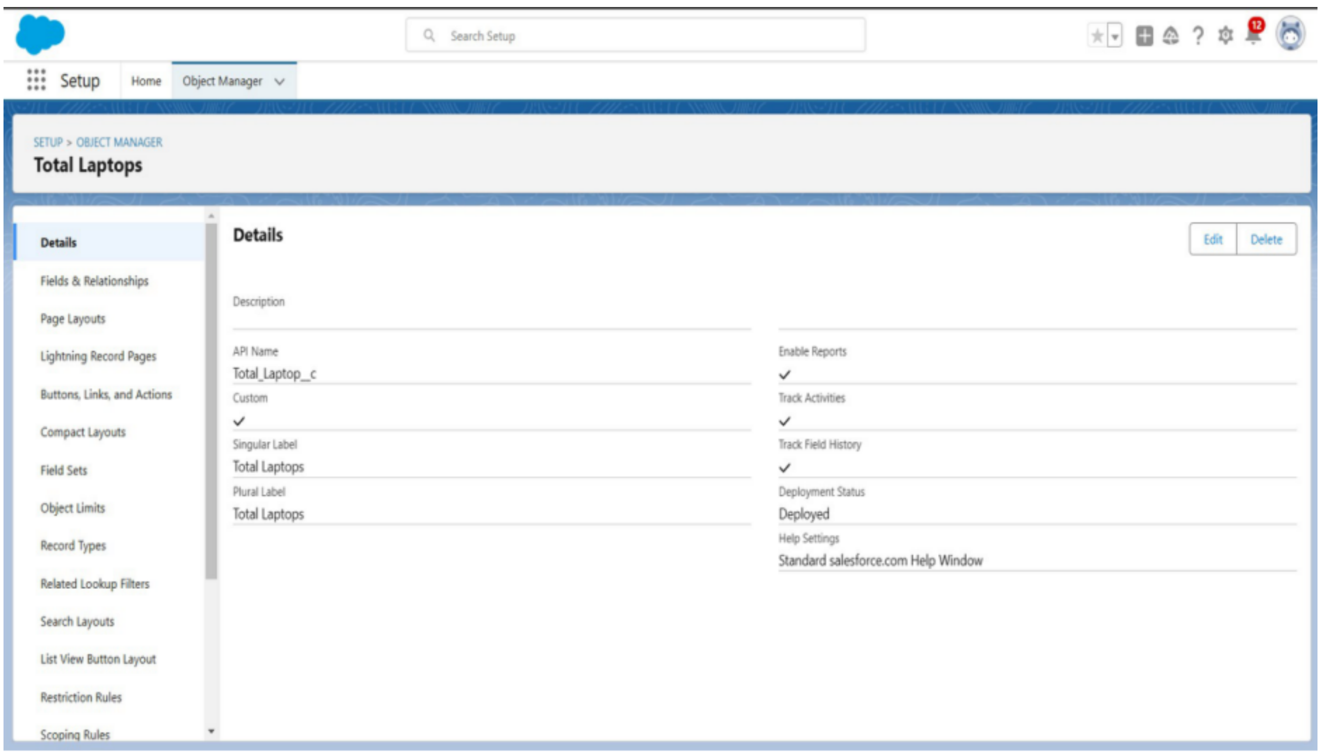
What Is an Object?

Salesforce objects are database tables that permit you to store data that is specificto an organization. Salesforce objects are of two types:

1. **Standard Objects:** Standard objects are the kind of objects that are provided bysalesforce.com such as users, contracts, reports, dashboards, etc.
2. **Custom Objects:** Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They arethe heart of any application and provide a structure for sharing data.

Create Total Laptops Object

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

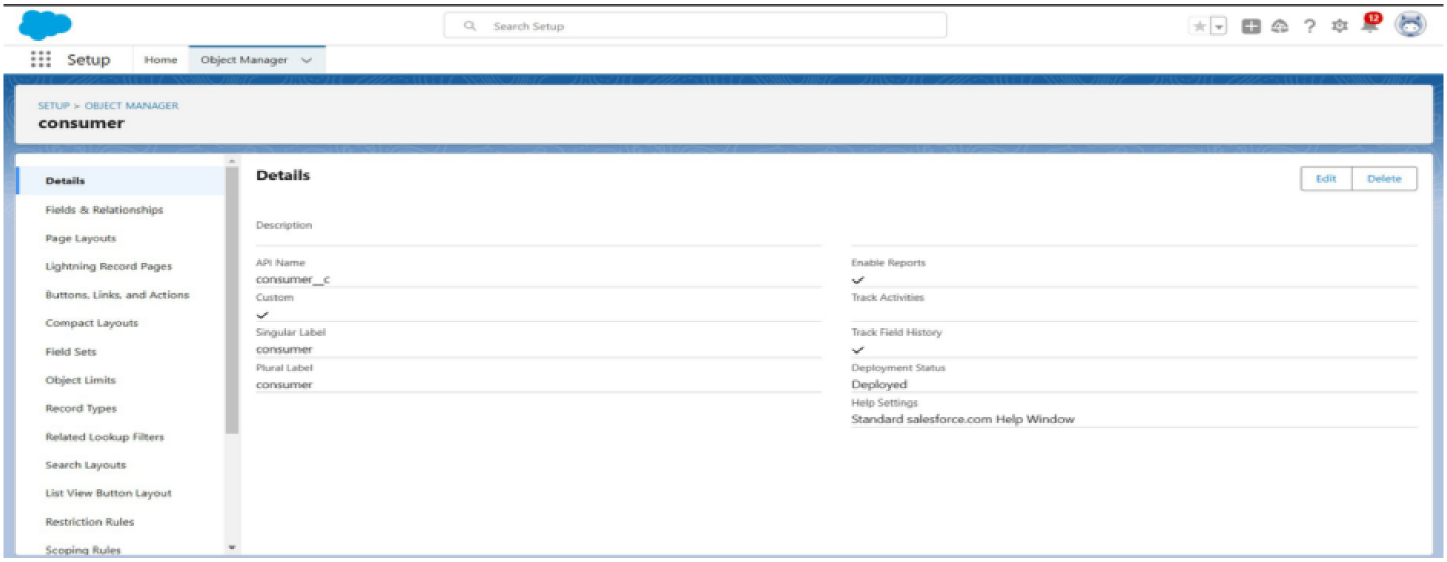


Create consumer Object

1. From the setup page >> Click on Object Manager >> Click on Create >> Click onCustom Object.
2. Enter the label name >> consumer
3. Plural label name >> consumer

4. Enter Record Name Label and Format Record Name >> consumer_name DataType >> Name
5. Click on Allow reports,Allow search and Track Field History,

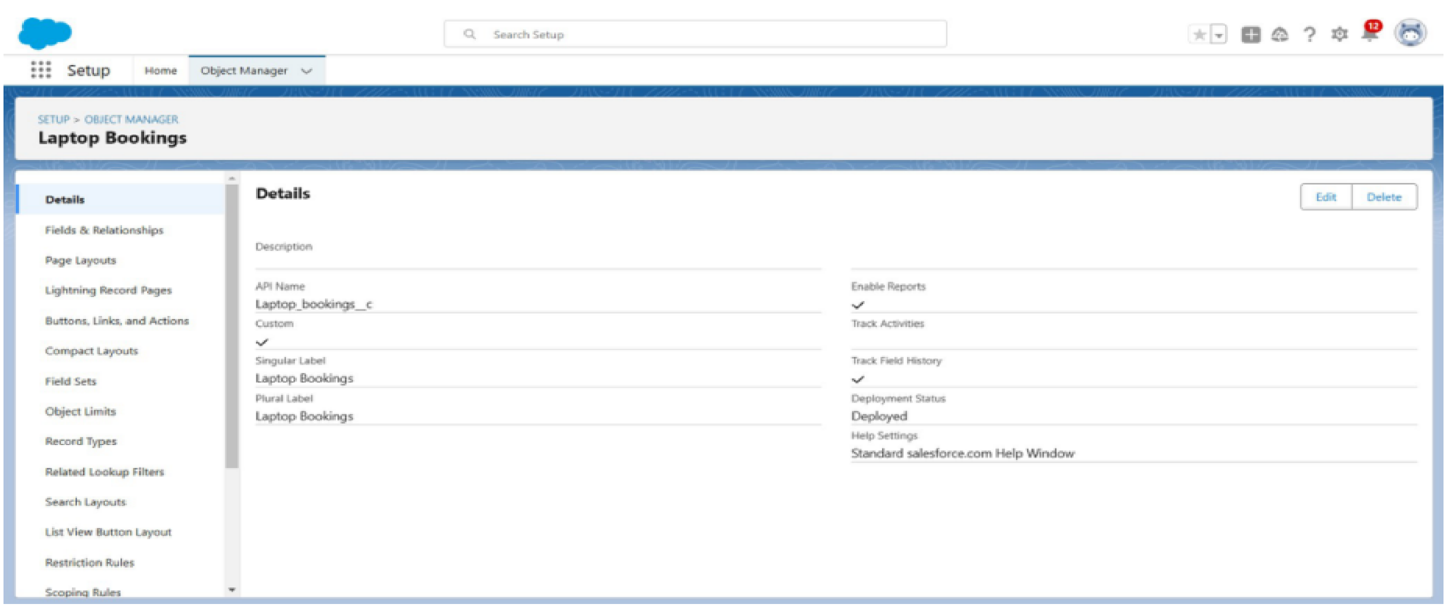
Allow search >> Save.



Create Laptop Bookings Object

1. From the setup page >> Click on Object Manager >> Click on Create >> Click onCustom Object.
2. Enter the label name >> Laptop bookings
3. Plural label name >> Laptop bookings
4. Enter Record Name Label and Format Record Name >> consumer_name DataType >> Name
5. Click on Allow reports,Allow search and Track Field History,

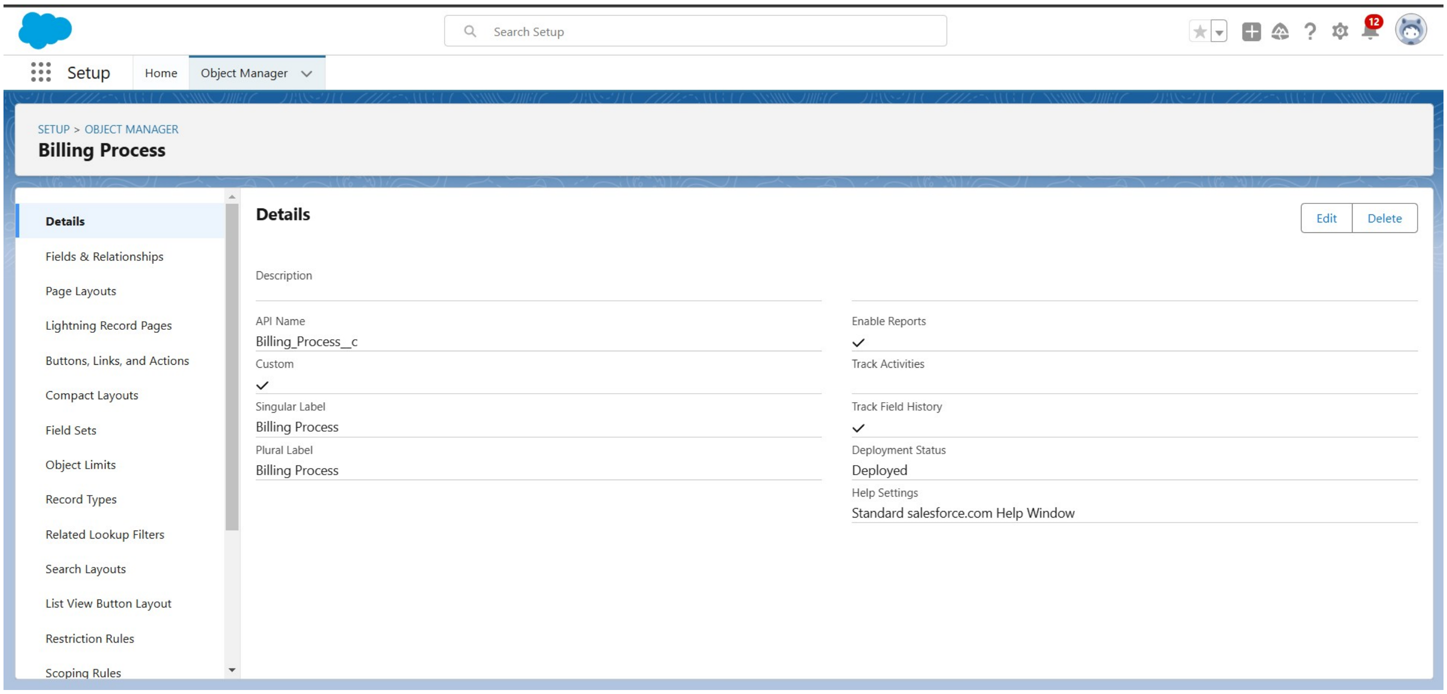
Allow search >> Save.



Create Billing Process Object

1. From the setup page >> Click on Object Manager >> Click on Create >> Click onCustom Object.
2. Enter the label name >> Billing process
3. Plural label name >> Billing process
4. Enter Record Name Label and Format Record Name >> consumer_name DataType >> Name
5. Click on Allow reports,Allow search and Track Field History,

Allow search >> Save.



Tabs

What is Tab: A tab is like a user interface that is used to build records for objects and to view the records inthe objects.

Types of Tabs:

a. **Custom Tabs:** Custom object tabs are the user interface for custom applications that you build in salesforce.com. They look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.

b. **Web Tabs:** Web Tabs are custom tabs that display web content or applications embedded in the salesforce.com window. Web tabs make it easier for your users to quickly access content and applications they frequently use without leaving the salesforce.com application.

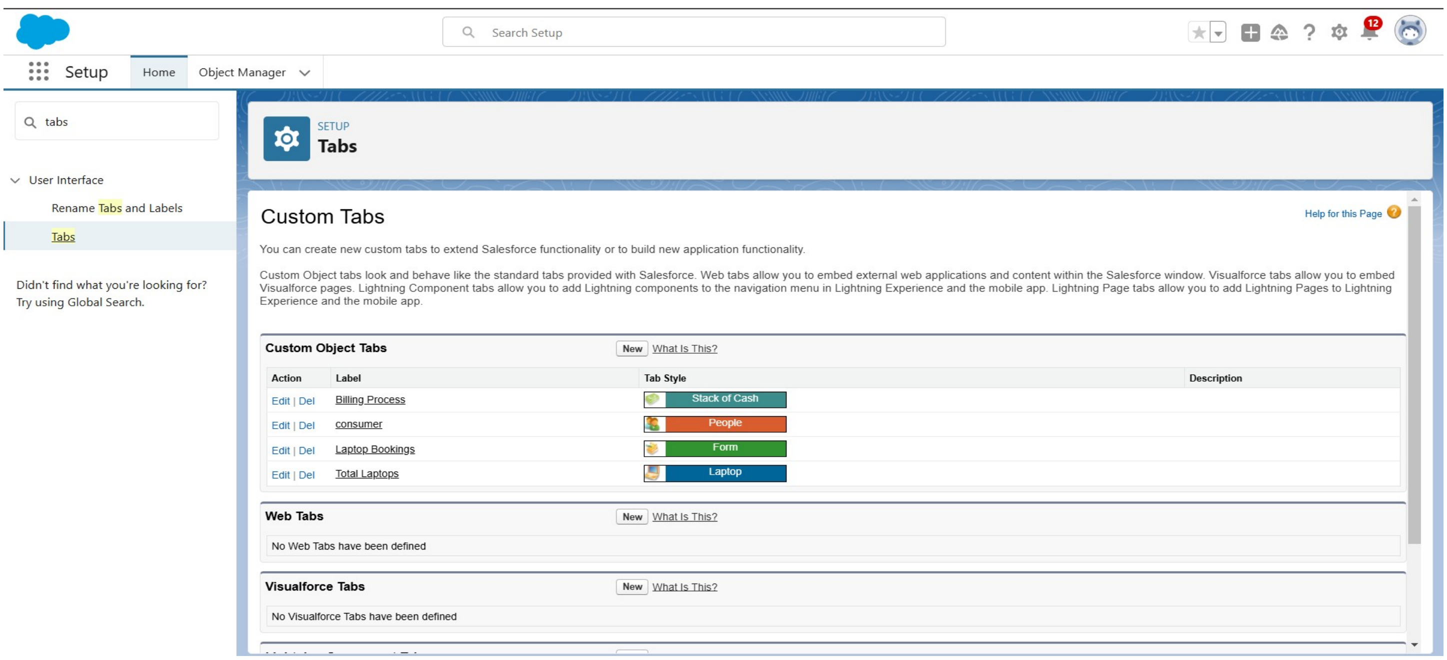
c. **Visualforce Tabs:** Visualforce Tabs are custom tabs that display a Visualforce page. Visualforce tabs look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.

d. **Lightning Component Tabs:** Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app.

e. **Lightning Page Tabs:** Lightning Page Tabs let you add Lightning Pages to the mobile app navigation menu. Lightning Page tabs don't work like other custom tabs. Once created, they don't show up on the All Tabs page when you click the Plus icon that appears to the right of your current tabs. Lightning Page tabs also don't show up in the Available Tabs list when you customize the tabs for your apps.

Creating a Custom Tab To create a Tab:

2. Go to setup page >> Type Tabs in Quick Find bar >> click on tabs >> New (undercustom object tab)
3. Select Object(Total Laptops) >> Select the tab style >> Next (Add to proles page)keep it as default >> Next (Add to Custom App) uncheck the include tab .
4. Make sure that the Append tab to users' existing personal customizations ischecked.
5. Click save.



The Lightning App

An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

Lightning apps let you brand your apps with a custom color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your org can work more efciently by easily switching between apps.

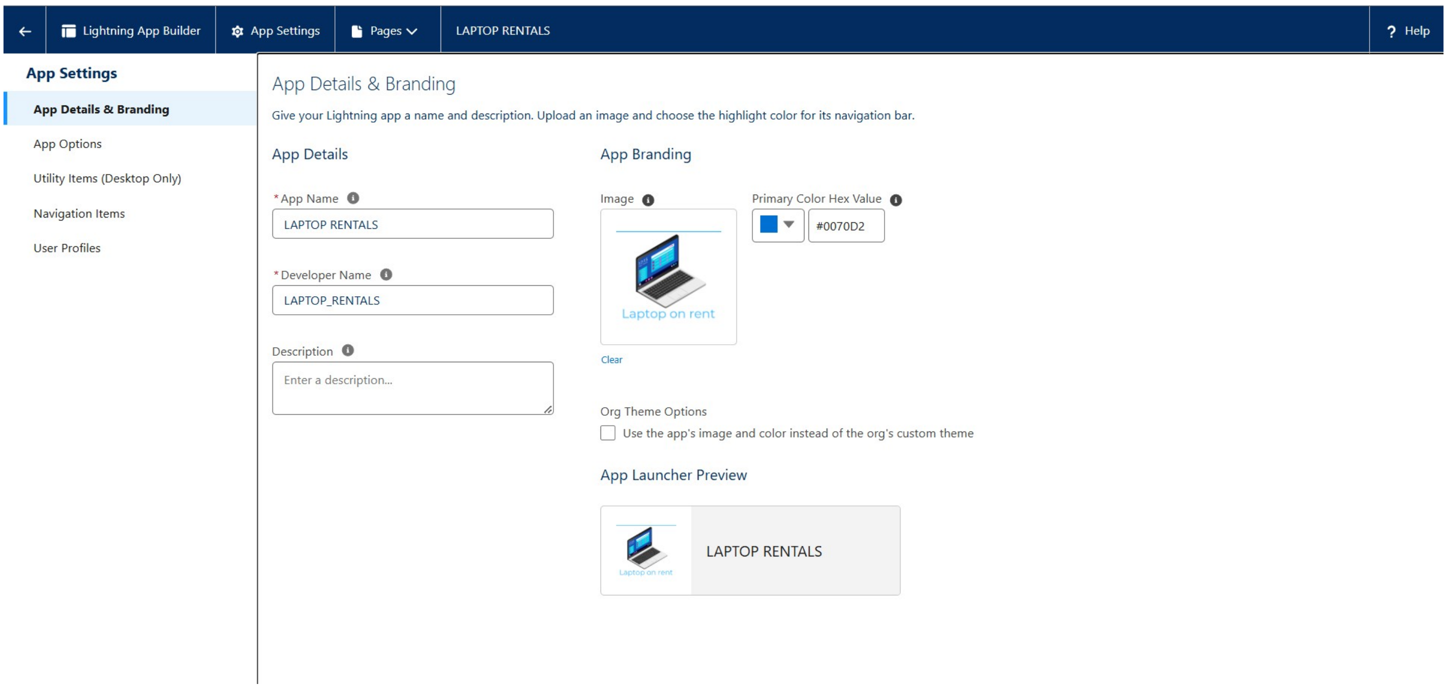
Create a Lightning App To create a lightning app page:

1. Go to 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 search bar and move it using the arrow button >>Next.

To Add User Proles: Search proles (System administrator) in the search bar >> click on the arrow button >> save & finish.



Fields

When we talk about Salesforce, Fields represent the data stored in the columns of arelational database. It can also hold any valuable information that you require for aspecic object. Hence, the overall searching, deletion, and editing of the records become simpler and quicker. Types of Fields:

1. **Standard Fields:** As the name suggests, the Standard Fields are the predenedelds in Salesforce that perform a standard task. The main point is that you can’tsimply delete a Standard Field until it is a non-required standard eld. Otherwise,users have the option to delete them at any point from the application freely. Moreover, we have some elds that you will nd common in every Salesforce application. They are,

>>Created By

>>Owner

>> Last Modfied

>> Field Made During object Creation

2.Custom Fields: On the other side of the coin, Custom Fields are highly exible, and users can change them according to requirements. Moreover, each organizer or company can use them if necessary. It means you need not always include themin the records, unlike Standard elds. Hence, the nal decision depends on the user, and he can add/remove Custom Fields of any given form.

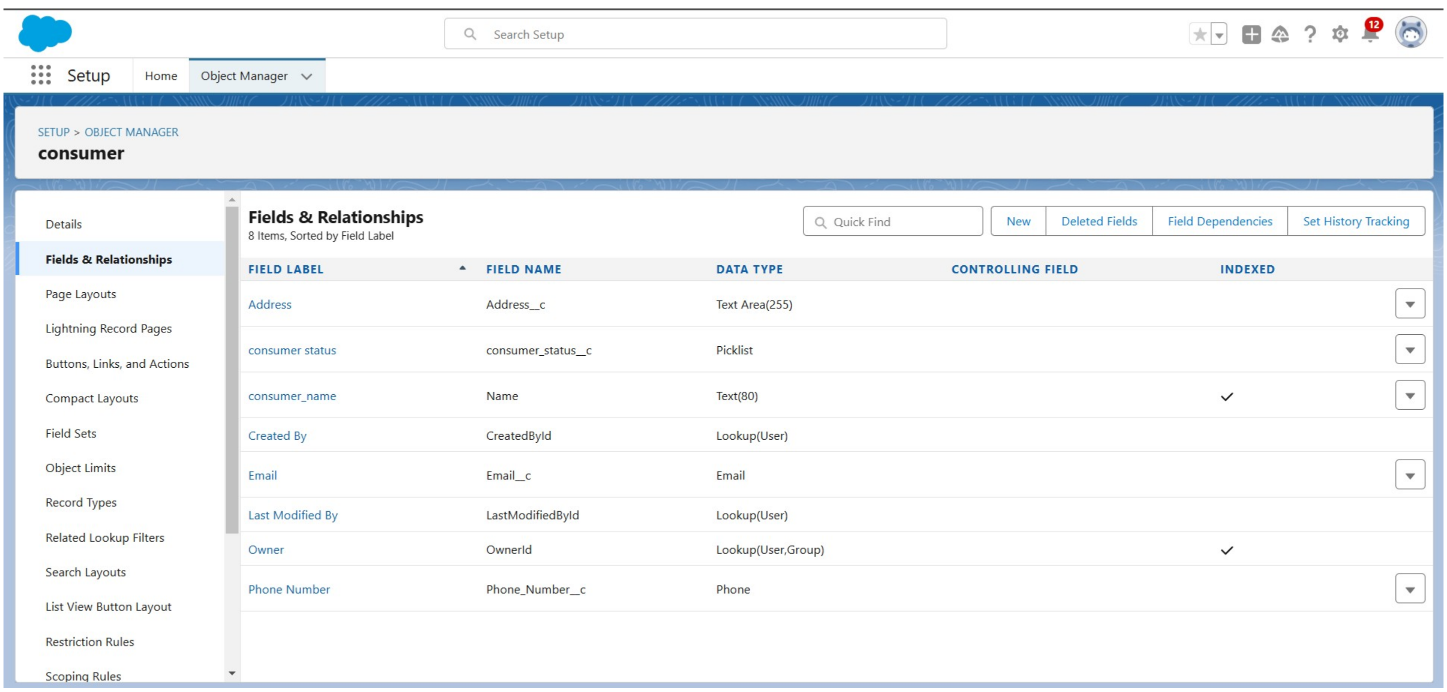
Creating the field in consumer object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(consumer) in searchbar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data Type as a “Phone” and Click on Next

To create another fields in an object:

1. Go to setup >> click on Object Manager >> type object name(consumer) in searchbar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as a “Email” and Click on Next



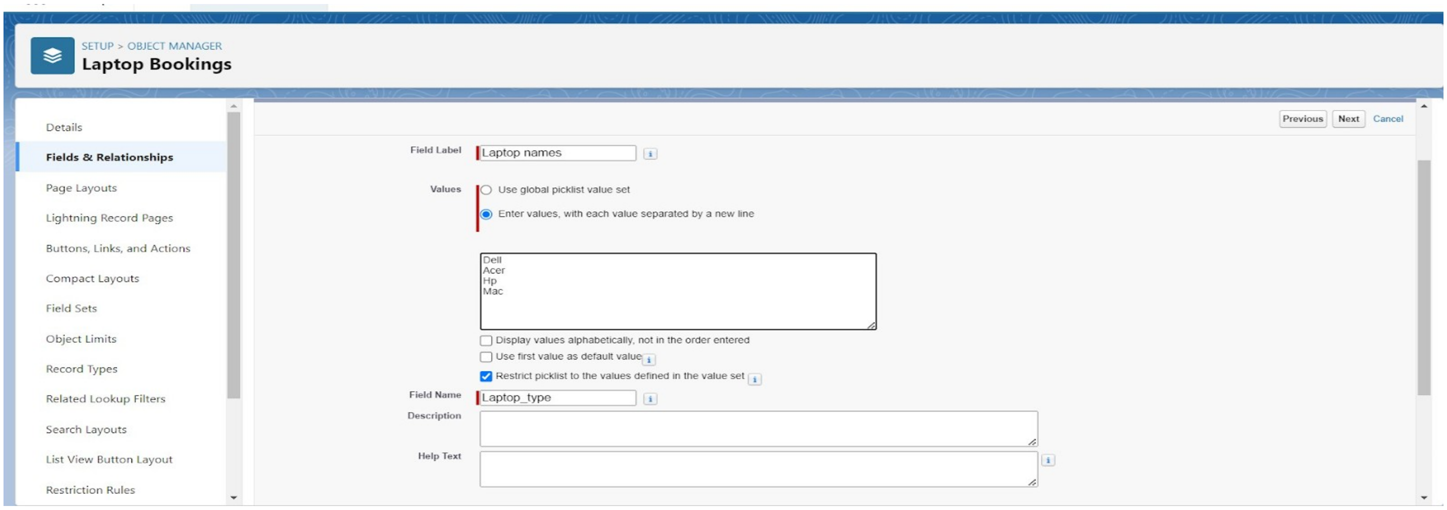
Creating the field in Laptops Bookings objectTo create fields in an object:

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

c. Select Data Type as a “Picklist”

d. Picklist values are:-1.Dell 2.Acer 3.Hp 4.Mac



a. Select required

b. Click on Next >> Next >> Save and new

2.To Create a Fields & Relationship to an Laptop Booking Object

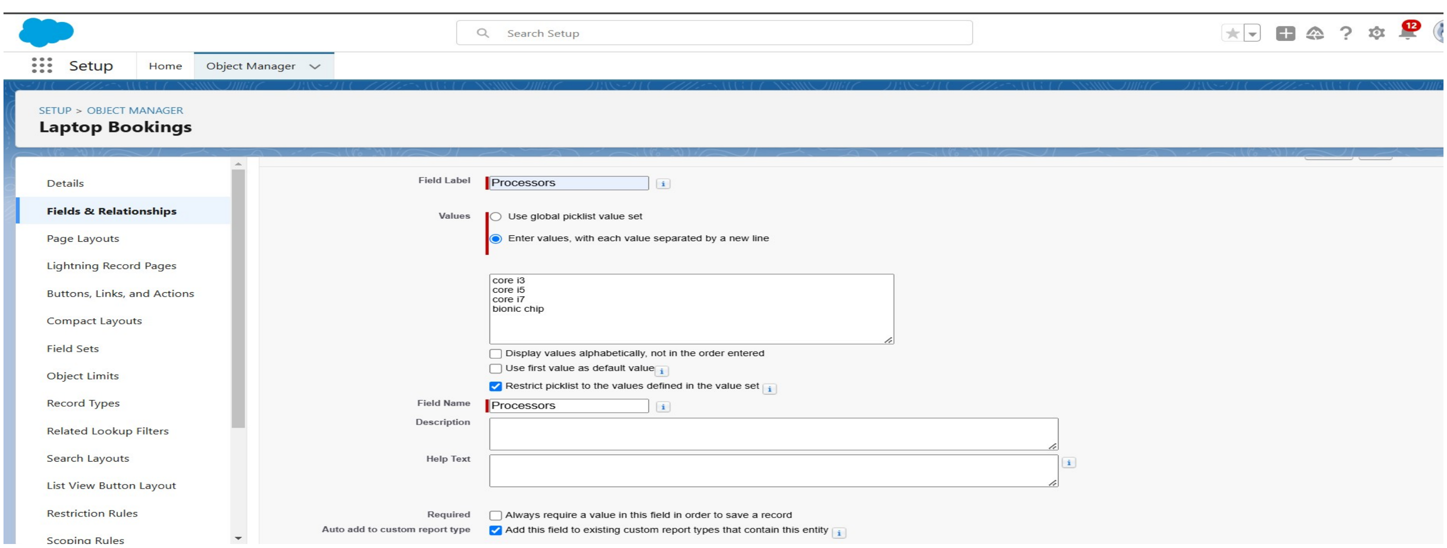
To create fields & relationship to an object:

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

c. Select Data Type as a “Picklist”

d. Picklist values are:-1.core i3 2. Core i5 3. Core i7 .



e.Select required

f.Click on Next >> Next >> Save and new

NOTE:-

Field Dependency:

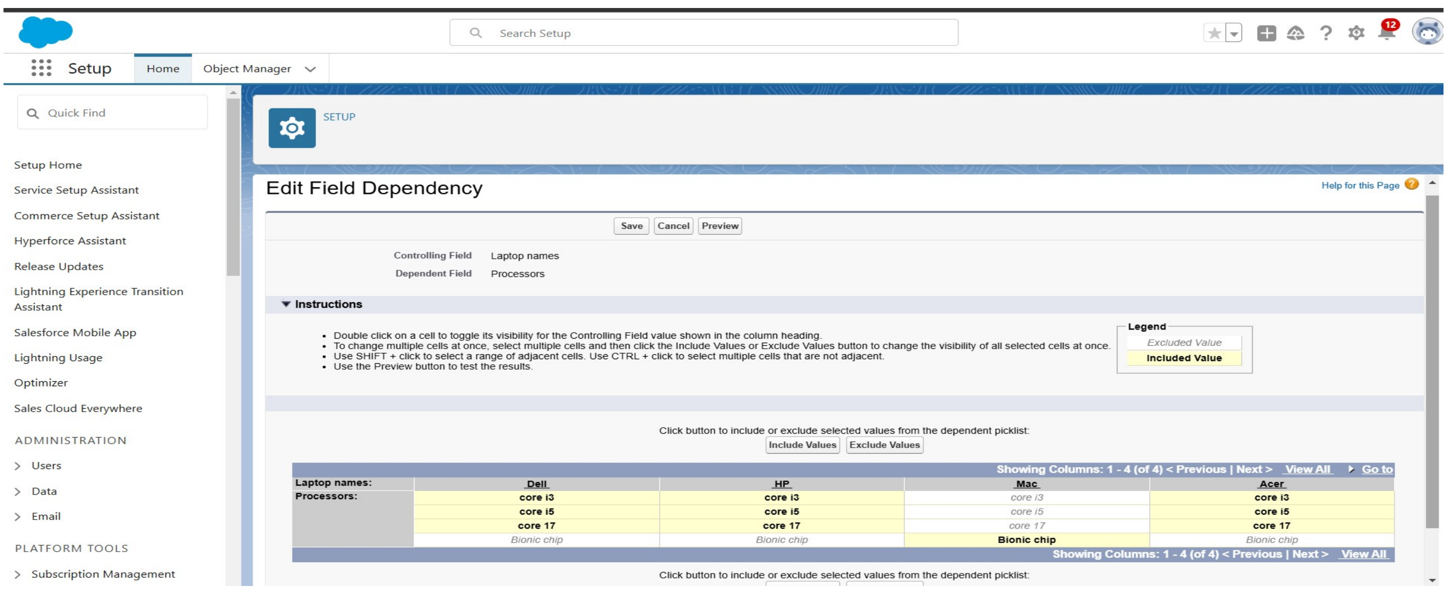
1. A field dependency refers to a relationship between two fields on an object where the values of one field determine the available values for another field. Field dependencies are commonly used to create picklist field relationships, where the available options in a dependent picklist are determined by the value selected in a controlling picklist.

Need to use Field Dependency:

1. By using the field dependency we can get the different Values by selecting the different Picklist.

To create fields & relationship to an object:

1. Go to setup >> click on Object Manager >> type object name(Laptop Booking)in the search bar >> click on the object.
2. click field dependency and next
3. Click the include value for dell-core i3,i5,i7 and for acer i3,i4,i5 and for hpi3,i4,i5 and also for mac bionic chip include the values for it.



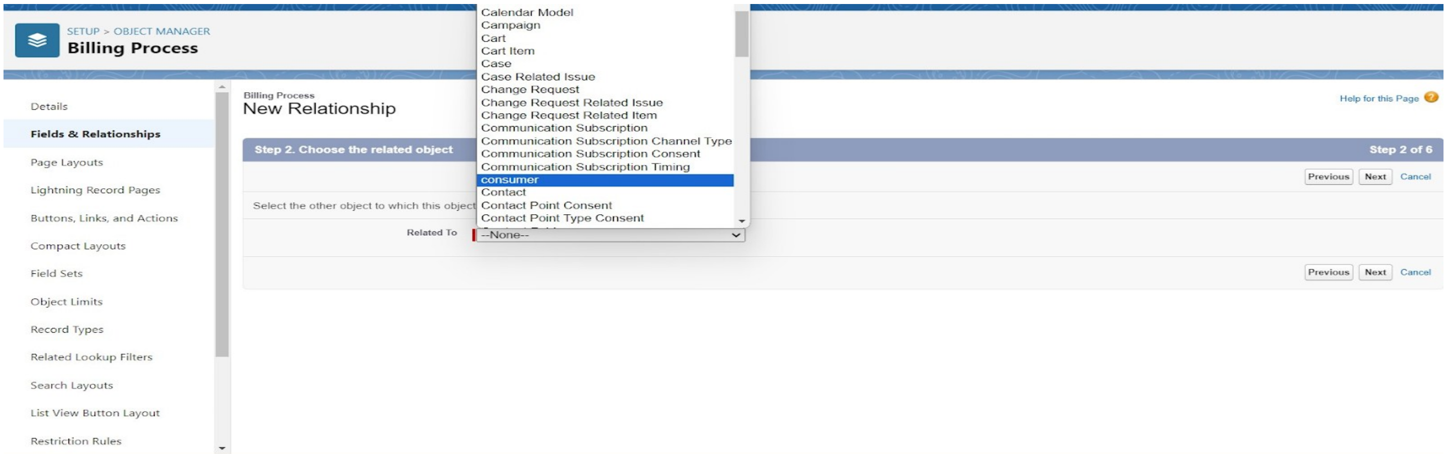
To Create a Fields & Relationship for Billing Process Object

1. Go to setup >> click on Object Manager >> type object name(Billing Process) inthe search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data Type as a “Master-detail Relationship”
4. Click on Next
5. Click on the Related to drop down and Select the consumer object and click on

Next

1. Change the Field Label: Name

2. click on Next >> Next >> Save and new



Creation of another fields for the billing process objectTo create fields in an object:

a. Go to setup >> click on Object Manager >> type object name(Billing Process)in the search bar >> click on the object.
b. Now click on “Fields & Relationships” >> New
c. Select Data Type as a “Picklist”
d. Fill the Above as following:

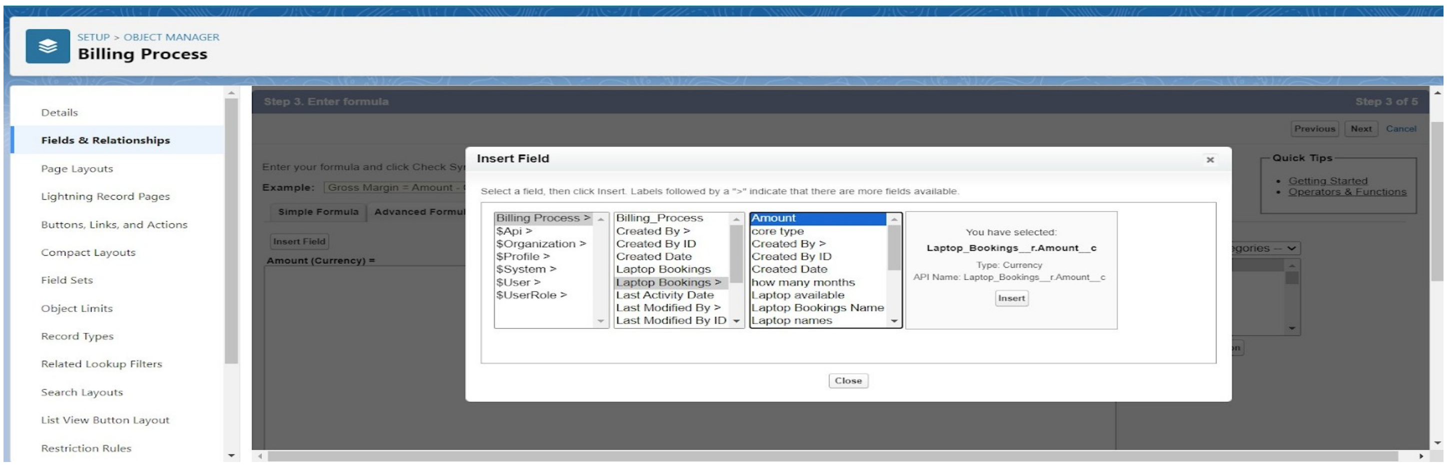
1. Field Label: Payment Mode
2. Value >> Select enter values with each value separated by a new line
    i. Cash
    ii. Check
    iii. Credit card
    iv. Debit card
    v. UPI
    vi. Phonepe
    vii. Gpay
    viii. Paytm
3. Select required

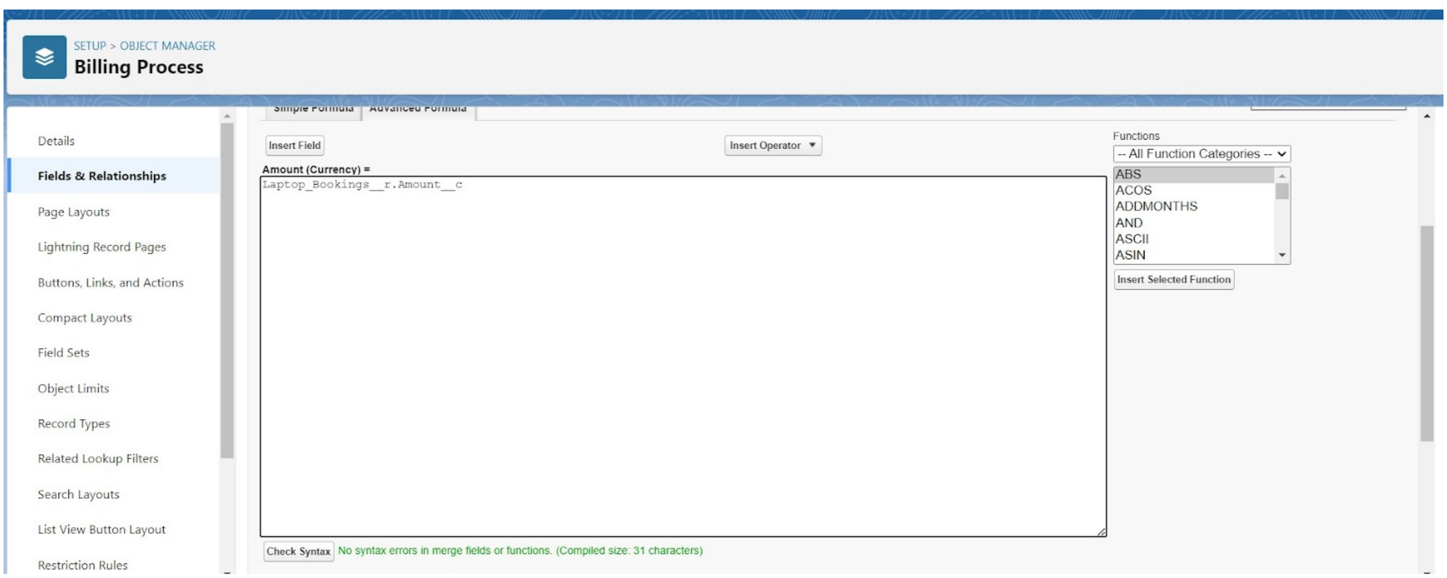
Click on Next >> Next >> Save and new.

Create a Cross object formula Field in billing process Object

1. Go to setup >> click on Object Manager >> type object name(Billing Process)in the search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data Type as a “Formula”

4. Click on Next
5. Enter the Field label: Amount, the Field name gets auto generated and clickon Next.(Formula return type Number).
6. In the Advanced Formula Click on the Insert field in the popup Screen Selectthe Billing Process and in the second drop down select the Laptop Booking and in the three drop down select the Amount field and click on Insert
7. “ Laptop_Booking__r.Amount__c ”.
8. Click on the Check syntax: No syntax errors in merge fields.





Creating the field in Total Laptops object

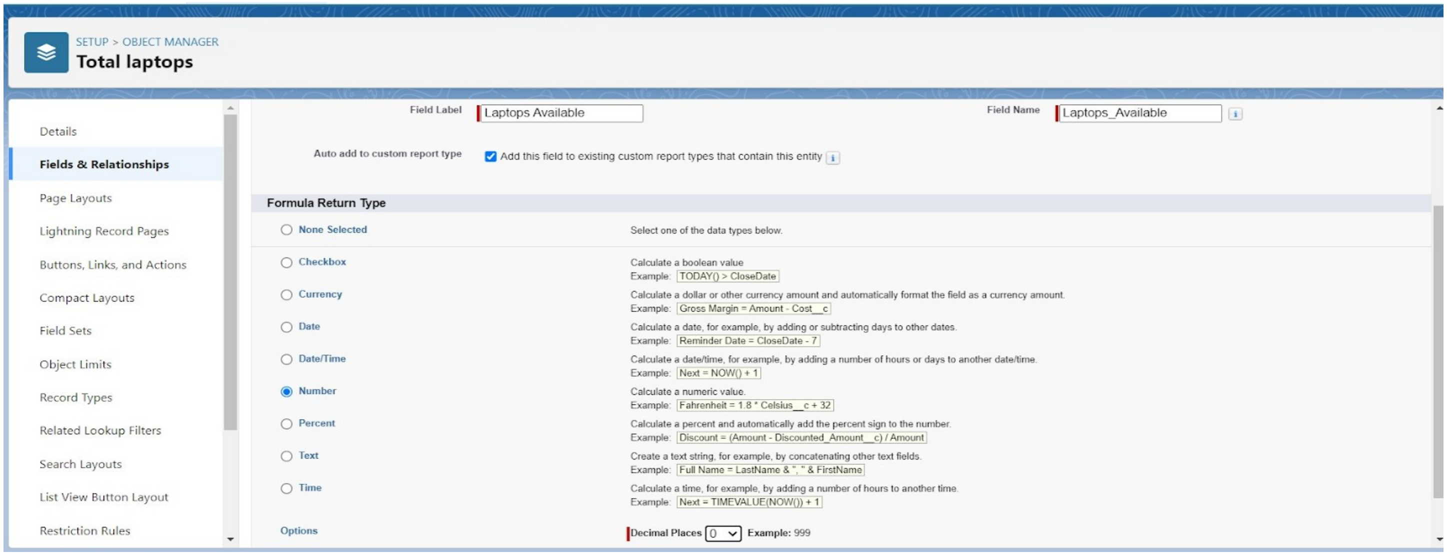
1. **To create fields in an object:**

   a. Go to setup >> click on Object Manager >> type object name(Total Laptops) insearch bar >> click on the object.

   b. Now click on “Fields & Relationships” >> New

   c. Select Data type as a “Formula” and Click on Next

d. Fill the Above as following:
e. Field Label: Laptops Available
f. Field Name : It's gets auto generated
g. Select the Formula Return Type as "Number"
h. Select the Decimal places as "0" and Click on Next



Validation rule

Validation rules are applied when 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 validationrule triggers an error message and prevents the user from saving the record untilthe issues are resolved.

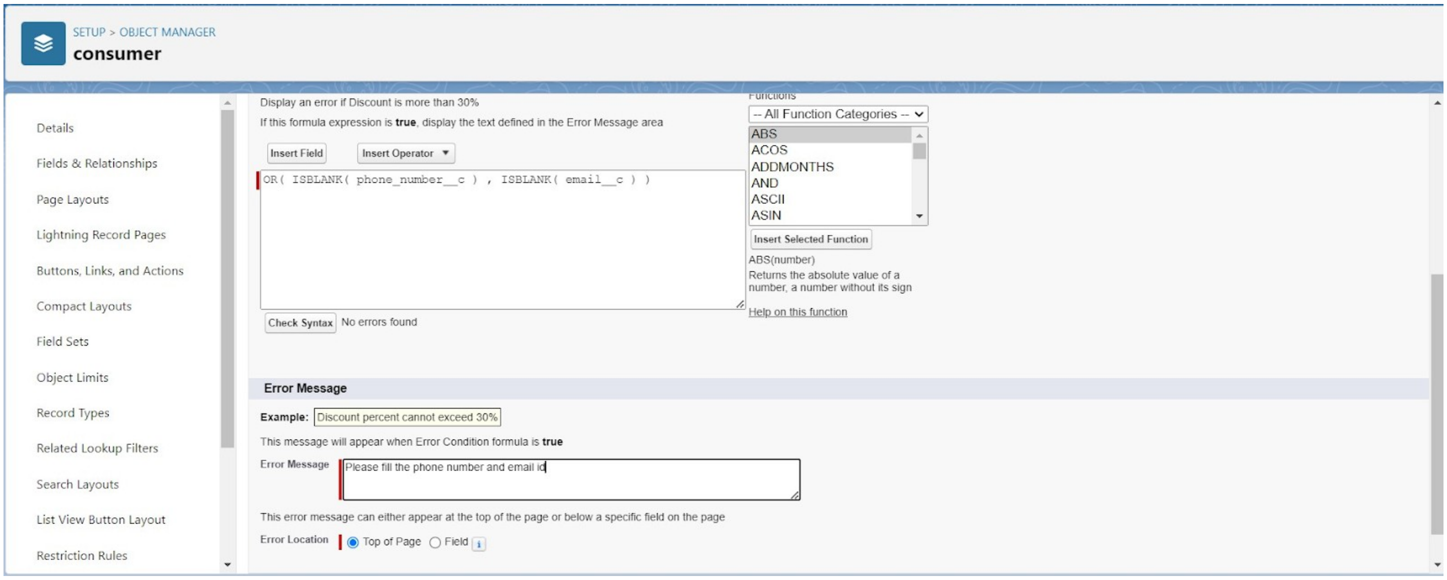
Improve the quality of your data using validation rules. Validation rules verify thatthe data a user enters in a record meets the standards you specify before the usercan save the record. A validation rule can contain a formula or expression that

evaluates the data in one or more fields and returns a value of "True" or "False". Validation rules also include an error message to display to the user when the rulereturns a value of "True" due to an invalid value.

Creating the validation rule for phone number field in consumerobject

1. Go to the setup page - click on object manager - From drop down click editfor 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 beblank”.
5. Enter the formula as “OR(ISBLANK(phone_number__c) , ISBLANK(email__c))” and check the syntax.
6. Save the validation rule



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. You can define profilesby the user's job function. For example System Administrator, Developer, Sales Representative.

Types of profiles in salesforce

1. Standard profiles:

By default salesforce provides below standard profiles.

1. Contract Manager
2. Read Only
3. Marketing User
4. Solutions Manager
5. Standard User
6. System Administrator.

We cannot deleted standard ones

Each of these standard ones includes a default set of permissions for all of thestandard objects available on the platform.

2. Custom Profiles:

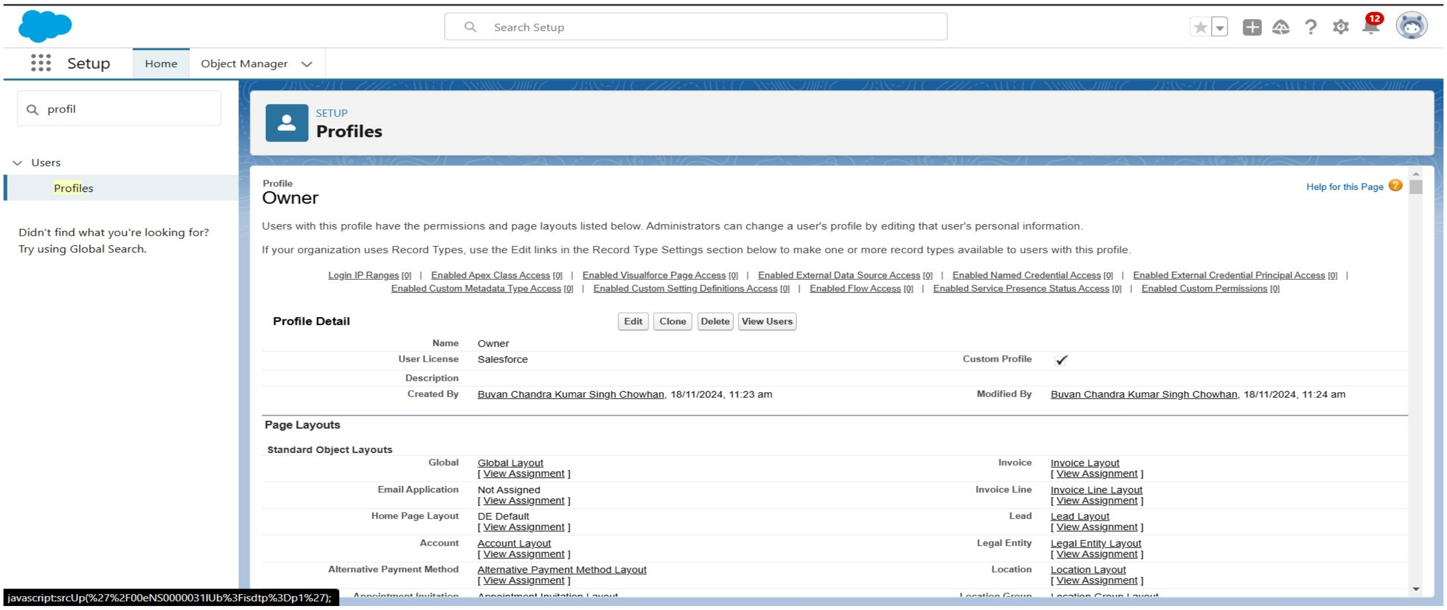
Custom ones defined by us.

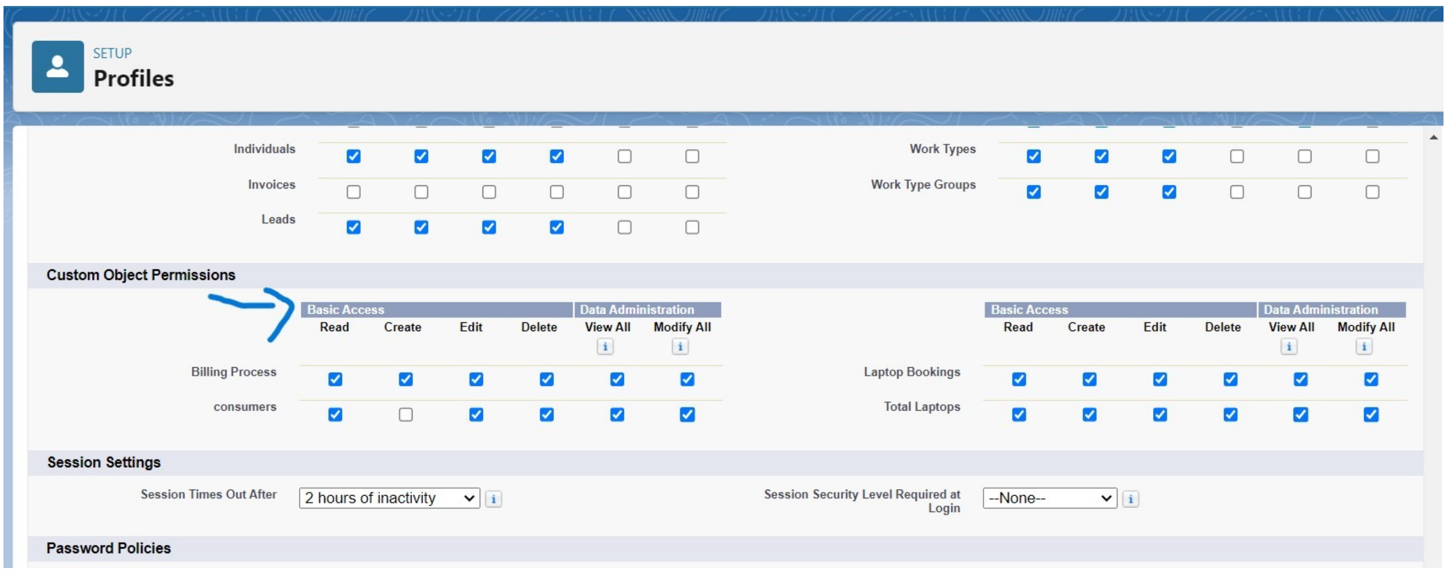
They can be deleted if there are no users assigned with that particular one.

Owner Profile

To create a new profile:

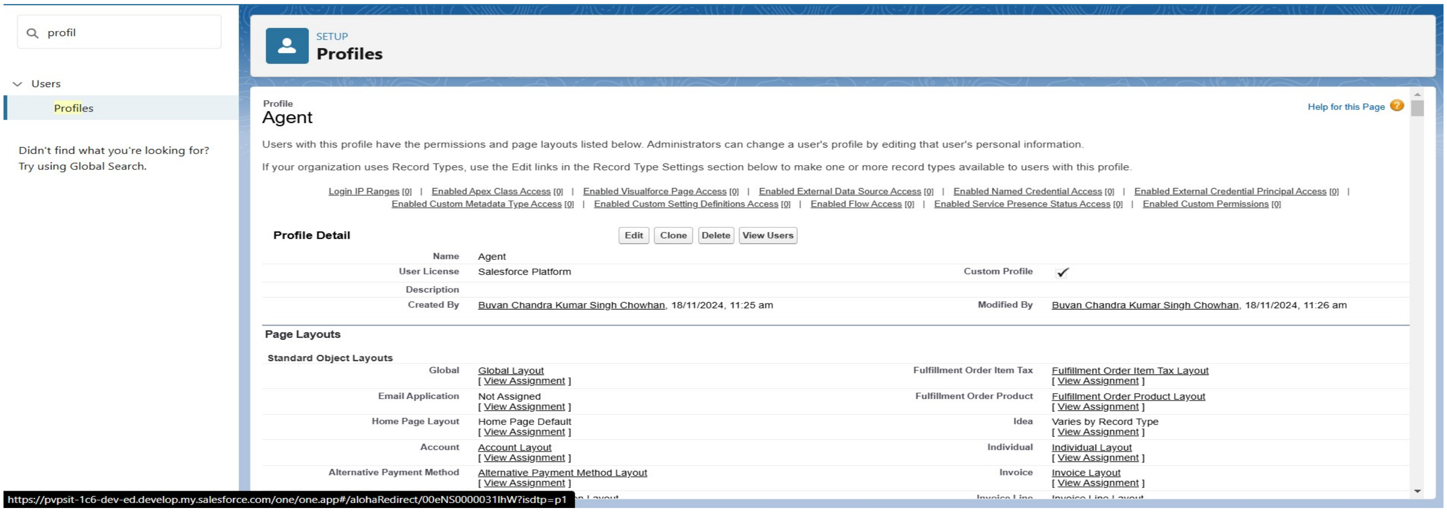
1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Standard User) >> enter profile name (owner) >> Save.
2. Scroll down to Custom Object Permissions and Give access permissions for Total Laptops, consumers , Laptop Booking and Billing Process objects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

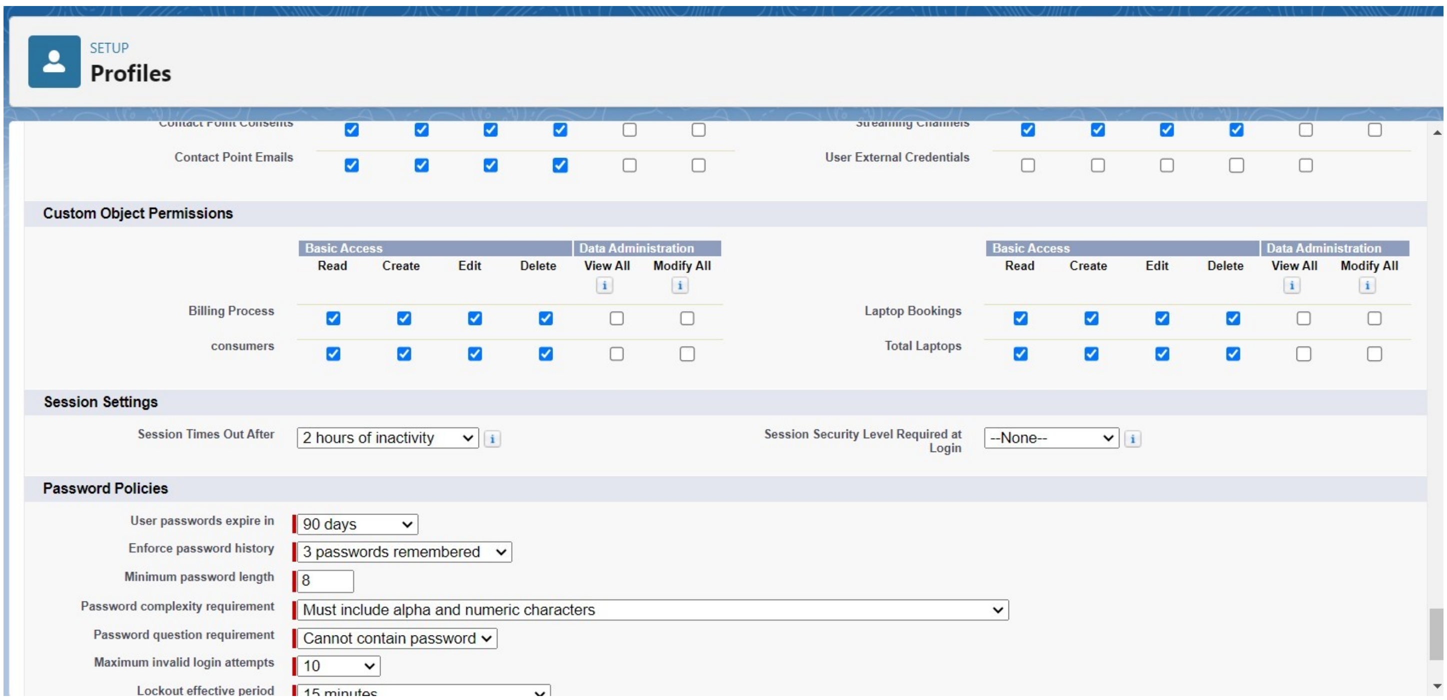




Agent Profile

1. Go to setup >> type profiles in quick find box >> click on profiles >> clone thedesired 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 forTotal Laptops, consumer , Laptop Bookings and Billing Process objects asmentioned in the below diagram.
4. Give access and save





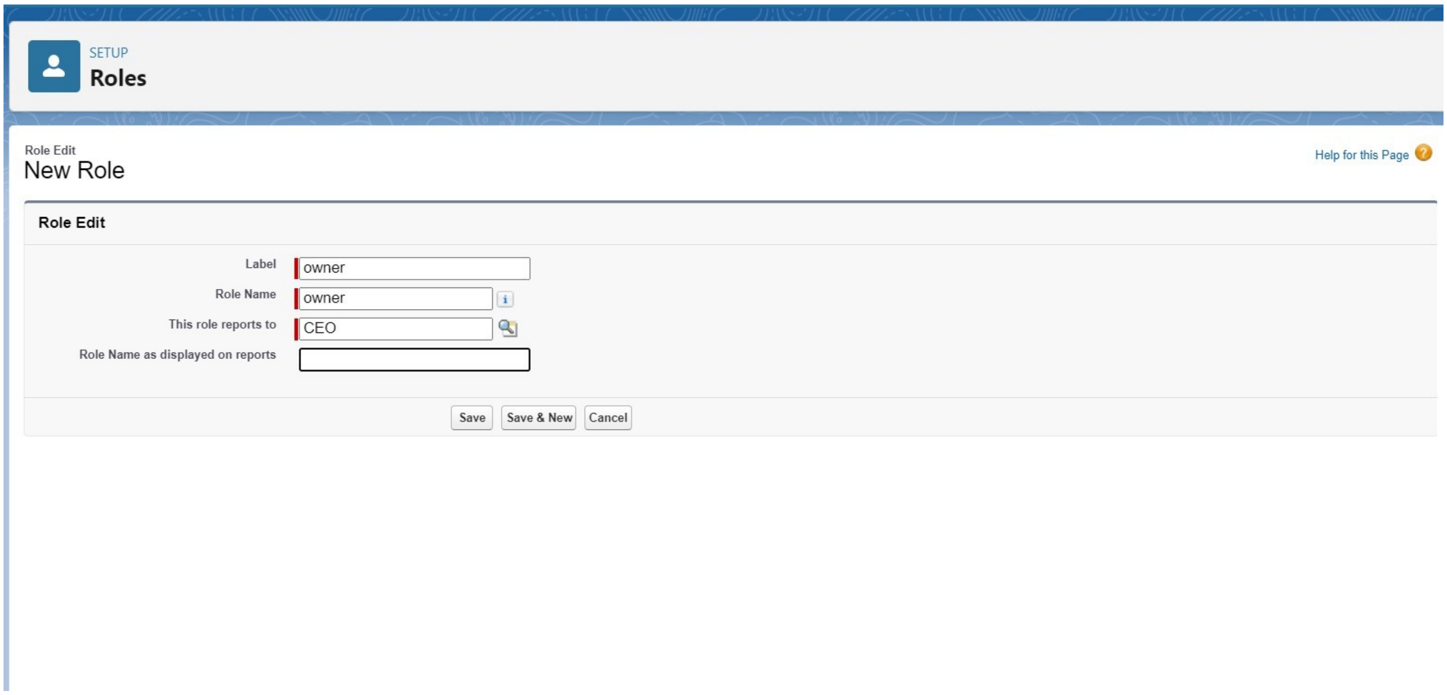
Roles and Hierarchy

A role in Salesforce defines a user's visibility access at the record level. Roles may beused to specify the types of access that people in your Salesforce organization can have to data. Simply put, it describes what a user could see within the Salesforce organization.

Creating owner Role

Creating owner 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 onSave.

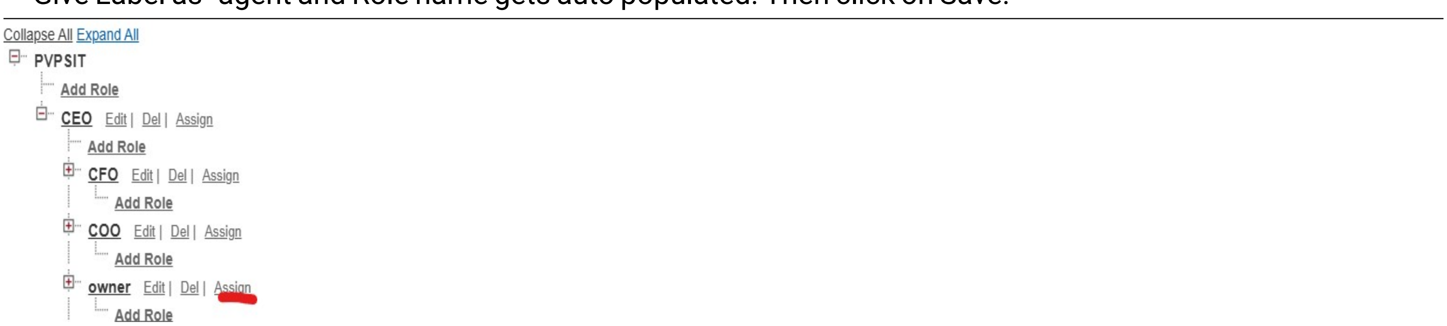


Creating agent Role

Creating owner 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.

Give Label as “agent and Role name gets auto populated. Then click on Save.



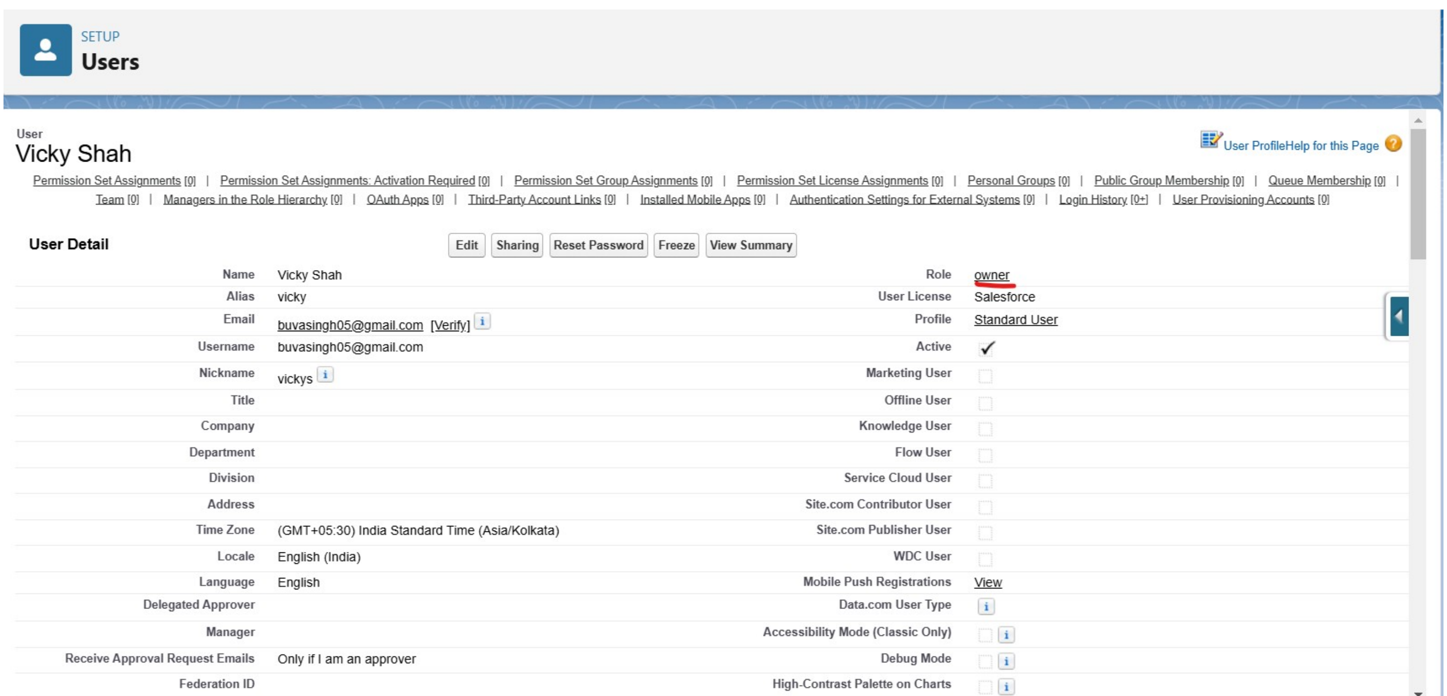
Users

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 theuser, and the user account settings determine what features and records the user can access.

Create User

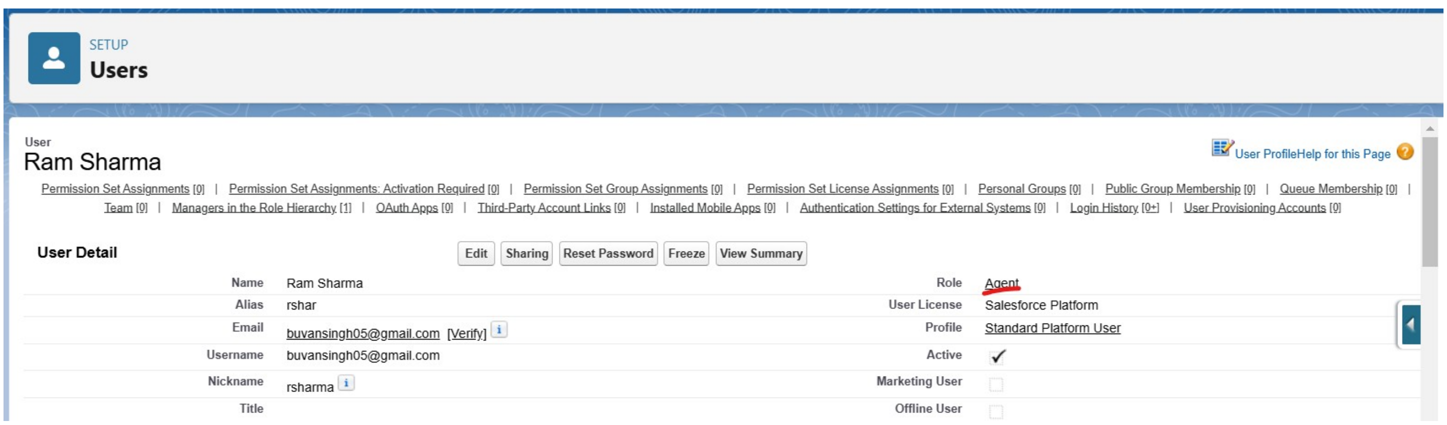
Creating Owner User

1. Go to setup - type users in quick find box - select users -click New user.
2. Fill in the fields
3. First Name : vicky
4. Last Name : shah
5. Alias : Give a Alias Name
6. Email id : Give your Personal Email id
7. Username : Username should be in this form: text@text.text
8. Nick Name : Give a Nickname
9. Role : owner
10. User license : Salesforce
11. Profiles : owner.



Creating Agent User

1. Go to setup -type users in quick find box - select users -click New user.
2. Fill in the fields
3. First Name : ram
4. Last Name : sharma
5. Alias : Give a Alias Name
6. Email id : Give your Personal Email id
7. Username : Username should be in this form: text@text.text
8. Nick Name : Give a Nickname
9. Role : Agent
10. User license : Salesforce platform
11. 11.Profiles : standard platform user.



Flows

In Salesforce, a flow is a powerful tool that allows you to automate business processes, collect and update data, and guide users through a series of screens or steps. Flows are built using a visual interface and can be created without any codingknowledge.
In Salesforce, "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. Salesforce Flow is a point-and-click tool that enables you to design and automate complex business processes, collect data, andinteract with users in a visual interface.

There are different types of flows in Salesforce, including:

Screen Flows: These are used to guide users through a series of screens to collector display information. Screen Flows are often used for data entry and updates.

Autolaunched Flows: These are flows that are triggered by events, such as when arecord is created or updated. They don't require user interaction and can be used for background automation.

Flow Builder: Flow Builder is the visual interface used to create flows. It allows youto design flows by adding elements, like screens, logic, and actions, using a drag- and-drop approach.

Flow Templates: Salesforce provides a library of pre-built flow templates that youcan use as a starting point for your own flows. These templates cover a variety ofuse cases, from simple to complex.

Scheduled Flows: These are flows that you can schedule to run at specific times orintervals. They are often used for automating recurring tasks.

Flow Elements: Flow Builder offers various elements that you can use to create flows, such as variables, decisions, loops, and more. These elements allow you tobuild sophisticated logic into your flows.

Subflows: Subflows are reusable flow elements that you can incorporate into multiple flows, making it easier to manage and maintain complex processes. **Record-Triggered Flows:** These are flows that are triggered when records meet specified criteria. They are often used for automating record updates and relatedactions.

Why do we need to create a flow:

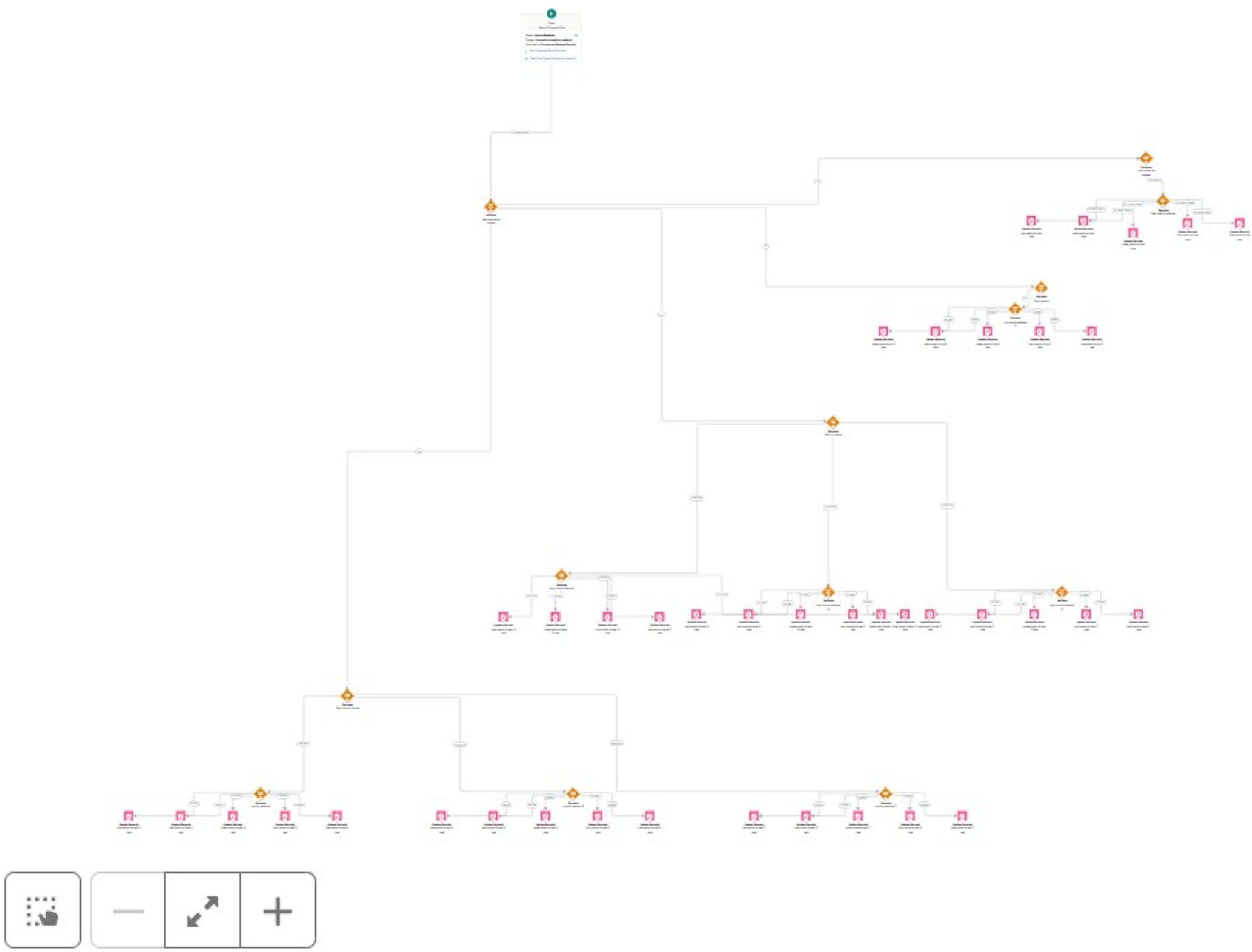
To get the Amount Field automatic by the selection of laptop types the Amount isgenerated Automatically in the amount field.

Create a Flow on dell laptop

1. Go to Setup and type "Flow" in the Quick Find box.
2. Select "Flow" and click "New Flow".
3. Choose "Record-Triggered Flow" and click "Create".
4. Select "Laptop Booking" from the object dropdown.
5. Set the trigger as "A record is Created or Updated".
6. Optimize the ow for "Actions and Related Records".
7. Click "+" under the ow canvas and select "Decision".
8. Set the label to "Update" (API name auto-generates).
9. Add outcomes for Dell, Acer, HP, and Mac.
10. After the laptop model decision, add another decision for core type (i3, i5, i7).

11. Dene conditions for core types (e.g., "core type equals i3").
12. Add outcomes for Dell core types (i3, i5, i7).
13. After core type decision, add another decision for months (1-5).
14. Set conditions for months (e.g., "how many months equals 1").
15. Add outcomes for months selected (1, 2, 3, 4, 5).
16. Add an "Update Record" action based on month selection.
17. Set Amount__c values for Dell i3 (1000, 2000, etc.).
18. Repeat the process for Dell i5 and i7 with corresponding amounts.
19. Connectoutcomes to the appropriate update record actions.
20. Save and activate the flow.

****Similarly we did for remaining laptops also**Final Flow:**



Apex

Creating Classes :

Apex classes are modeled on their counterparts in Java. You'll dene, instantiate, and extend classes, and you'll work with interfaces, Apex class versions, properties, andother related class concepts.

1. **Class:** As in Java, you can create classes in Apex. A class is a template or blueprint from which objects

are created. An object is an instance of a class.

2. **Object:** Object is an instance of a class, where it can access all the properties that are present in a class i.e, variables and methods. Steps to create a class in APEX:

1. Login to the trailhead account and navigate to the gear account in the top rightcorner.
2. Then we can see the Developer console. Click on the developer console and youwill navigate to a new console window.
3. Then you can see many tools in the Toolbar of the new console window. Click onFile, New and Apex Class.
4. Enter the name of the class to create a new class Ie.

Apex Trigger code:

```
trigger LaptopBooking on Laptop_Bookings_c (After insert,after update) {if(trigger.isAfter && ( trigger.isInsert ||
    trigger.isupdate))
    {


LaptopBookingHandler.sendEmailNotification(trigger.new);
    }
}
```

1. LaptopBooking - trigger name

Laptop_Bookings_c -as per your org(go to laptop bookings object and copy fromthat object api name).

Apex Class

```
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 youwith good quality resources. \n Laptop Amount = ' +
lap.Amount_c + ' \n core type
= '+lap.Processors_c +' \n Laptop type = '+lap.Laptop_names_c;email.setPlainTextBody(body);
            Messaging.sendEmail(new    List<Messaging.SingleEmailMessage>{email});
        }
    }
}
```

1. Class name:- LaptopBookingHandler
2. API Name:- Laptop_Bookings_c(as per your org go to laptop booking object andcopy from that).
3. core_c (as per your org go to laptop booking object and copy from that). 4.Laptop_type_c.(as per your org go to laptop booking object and copy from that).In this project , 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.

Reports

Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, andshare the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics.

In Salesforce.com we can easily generate reports in different styles. And can createreports in a very short time and also schedule the reports. Salesforce provides a powerful suit of analytic tools to help you organize, view and analyze your data.

Types of Reports in Salesforce :

1. **Tabula Reports:** Simple listing of data without any subtotals. This type of reports provide you most basically to look at your data. Use tabular reports when you want a simple list or a list of items with a grand total.

Example: This type of reports are used to list all accounts, List of contacts, List ofopportunities…..etc.….

2. **Summary Reports:** This type of reports provide a listing of data with groupings and sub totals. Use summary reports when you want subtotals based on the valueof a particular field or when you want

to create a hierarchically grouped report, such as sales organized by year and then by quarter.

Example: All opportunities for your team sub totaled by Sales Stage and Owner.

3. **Matrix Reports:** This type of reports allow you to group records both by row andby column. A comparison of related totals, with totals by both row and column. Usematrix reports when you want to see data by two different dimensions that aren't related, such as date and product.

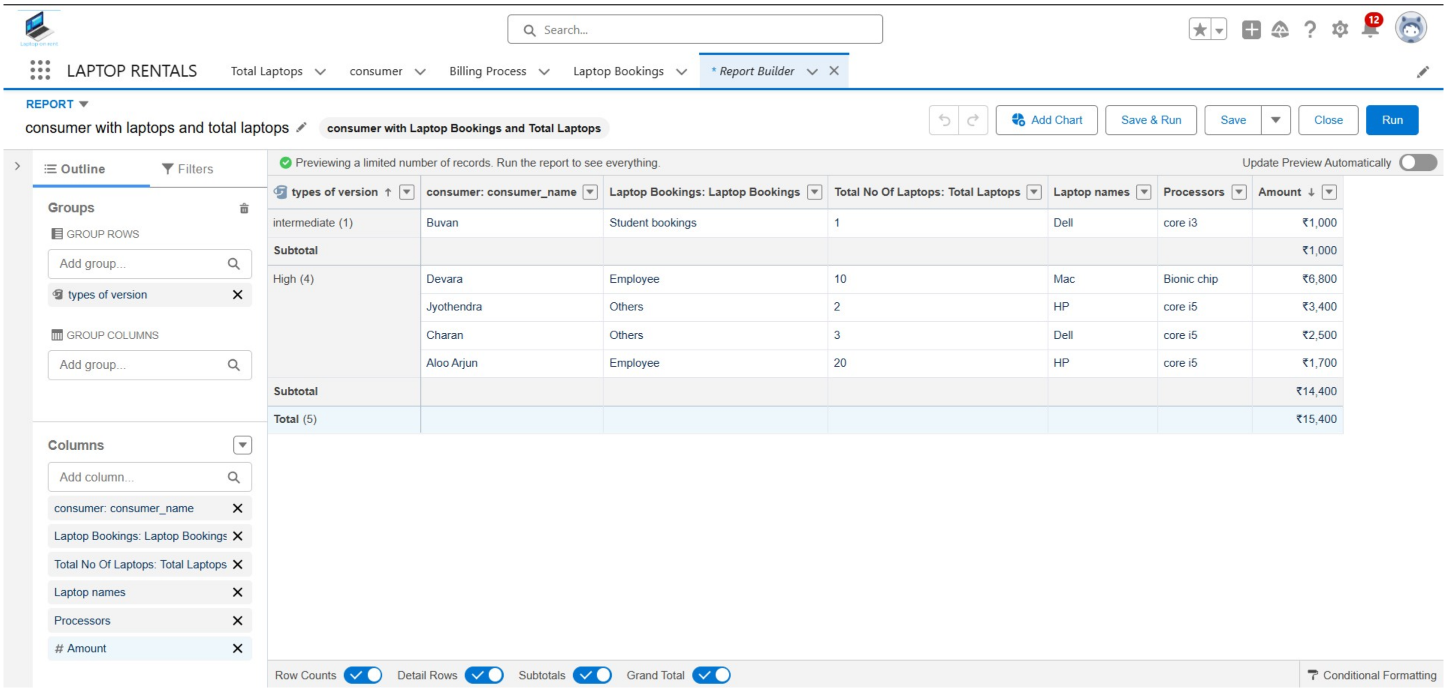
Example: Summarize opportunities by month vertically and by account horizontally.

4. **Joined Reports:** Blocks of related information in a single report. This type of reports enable you to adopt five different blocks to display different types of relateddata. Each block can own unique columns, summary fields, formulas, filters and sort order. Use joined reports to group and show data from multiple report types indifferent views.

Example: You can build a report to show opportunity, case and activity data for youraccounts.

Create Report

a. Go to the app -click on the reports tab
b. Click New Report.
c. Select report type from category or from report type panel or from search panel "consumer with Laptop Bookings and total laptops" >> click on startreport.
d. Customize your report
e. Add fields from left pane as shown below
f. Click the column drop down and select bucket list.
g. Follow the picture and save or run it.

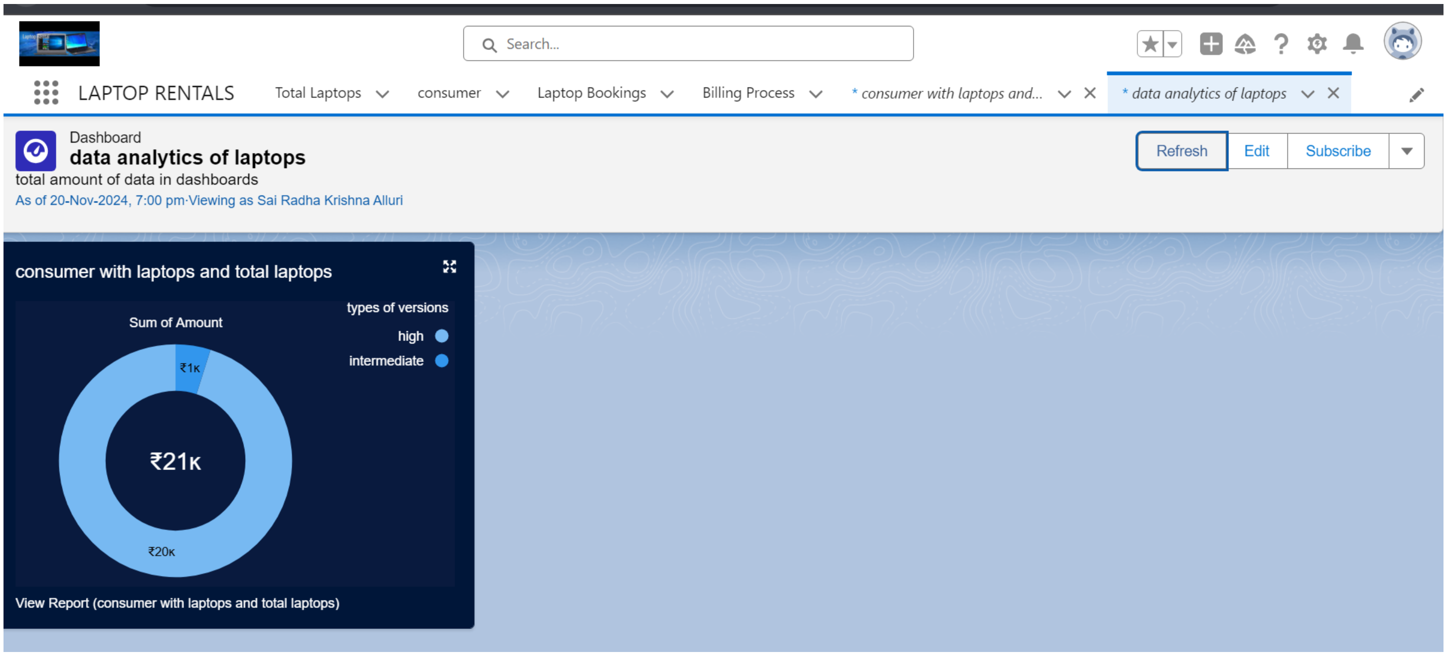


Dashboards

Dashboards help you visually understand changing business conditions so you canmake 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. Before building, reading, and sharing dashboards, reviewthese dashboard basics.

Create Dashboard Folder

1. Click on the app launcher and search for the dashboard.
2. Click on the dashboard tab.
3. Click the new folder, give the folder label as "total rent amount".
4. Folder unique names will be auto populated.
5. Click save.


Search...
LAPTOP RENTALS
Total Laptops
consumer
Laptop Bookings
Billing Process
* consumer with laptops and...
* data analytics of laptops
Dashboard
data analytics of laptops
total amount of data in dashboards
As of 20-Nov-2024, 7:00 pm·Viewing as Sai Radha Krishna Alluri
Refresh
Edit
Subscribe
consumer with laptops and total laptops
Sum of Amount
types of versions
high
intermediate
₹1K
₹21K
₹20K
View Report (consumer with laptops and total laptops)