

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.

Object Creation

What Is an Object?

Salesforce objects are database tables that permit you to store data that is specific to an organization. What are the types of Salesforce objects

Salesforce objects are of two types:

1. Standard Objects: Standard objects are the kind of objects that are provided by salesforce.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 are the heart of any application and provide a structure for sharing data.

Here I have created four custom objects which are Total Laptops, Consumer object, Laptop Bookings, Billing Process.

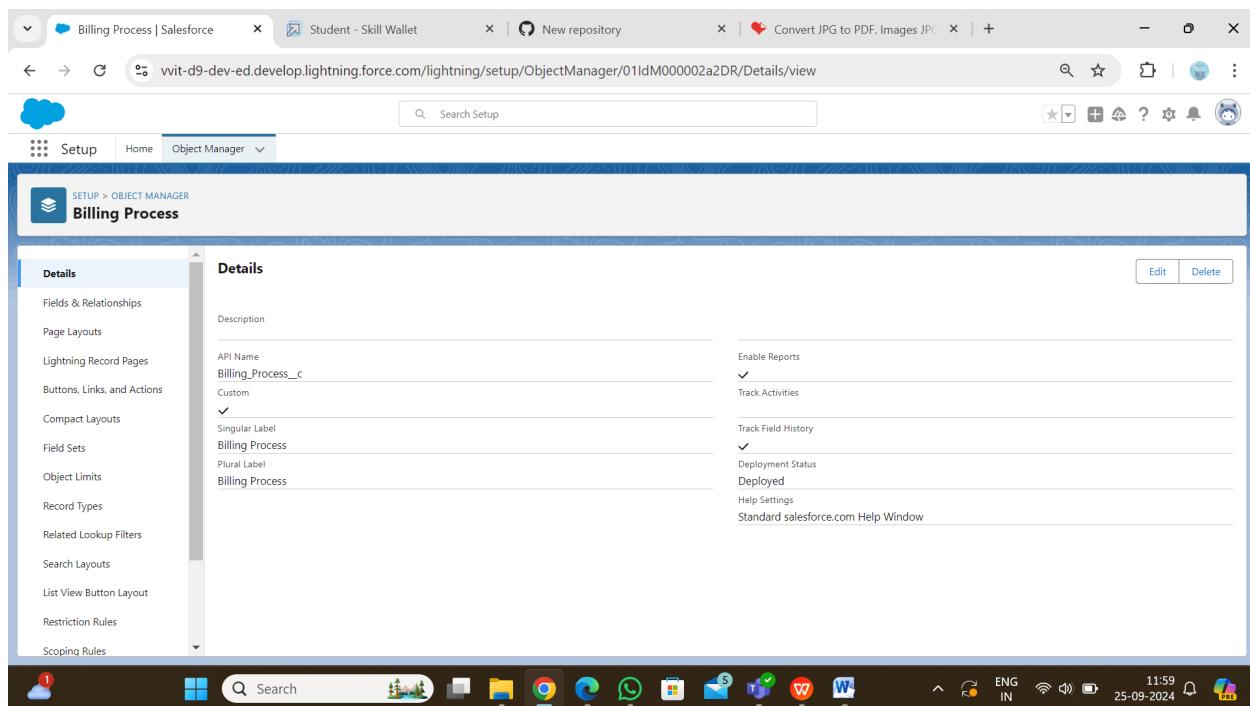
The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes tabs for 'Setup', 'Home', and 'Object Manager'. The main title is 'SETUP > OBJECT MANAGER Total Laptops'. On the left, a sidebar lists various object settings: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules. The main content area displays the 'Details' tab for the 'Total Laptops' object. It shows the API Name as 'Total_Laptops__c', a checked 'Custom' status, and singular/plural labels both set to 'Total Laptops'. On the right, there are sections for 'Enable Reports' (checked), 'Track Activities' (checked), 'Track Field History' (checked), 'Deployment Status' (set to 'Deployed'), and 'Help Settings' (set to 'Standard salesforce.com Help Window'). At the bottom of the page, the URL is https://vvit-d9-dev-ed.lightning.force.com/one/one.app#/setup/ObjectManager/01IdM000002a0ze/FieldsAndRelationships/view.

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The screenshot shows the Salesforce Object Manager interface. The left sidebar lists various configuration options: 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, List View Button Layout, Restriction Rules, and Scoping Rules. The main panel displays the 'Details' section for the 'consumer' object. The 'Description' field contains the API Name 'consumer__c'. Under the 'Custom' checkbox, the Singular Label is set to 'consumer' and the Plural Label is set to 'consumer'. On the right side, there are checkboxes for enabling Reports, Activities, Field History, and Deployment Status, all of which are checked. The status is listed as 'Deployed'. A link to the 'Standard salesforce.com Help Window' is also present. At the top right of the main panel are 'Edit' and 'Delete' buttons.

The screenshot shows the Salesforce Object Manager interface. The left sidebar lists the same configuration options as the previous screenshot. The main panel displays the 'Details' section for the 'Laptop Bookings' object. The 'Description' field contains the API Name 'Laptop_Bookings__c'. Under the 'Custom' checkbox, the Singular Label is set to 'Laptop Bookings' and the Plural Label is set to 'Laptop Bookings'. On the right side, the checkboxes for Reports, Activities, Field History, and Deployment Status are checked. The status is listed as 'Deployed'. A link to the 'Standard salesforce.com Help Window' is also present. At the top right of the main panel are 'Edit' and 'Delete' buttons.

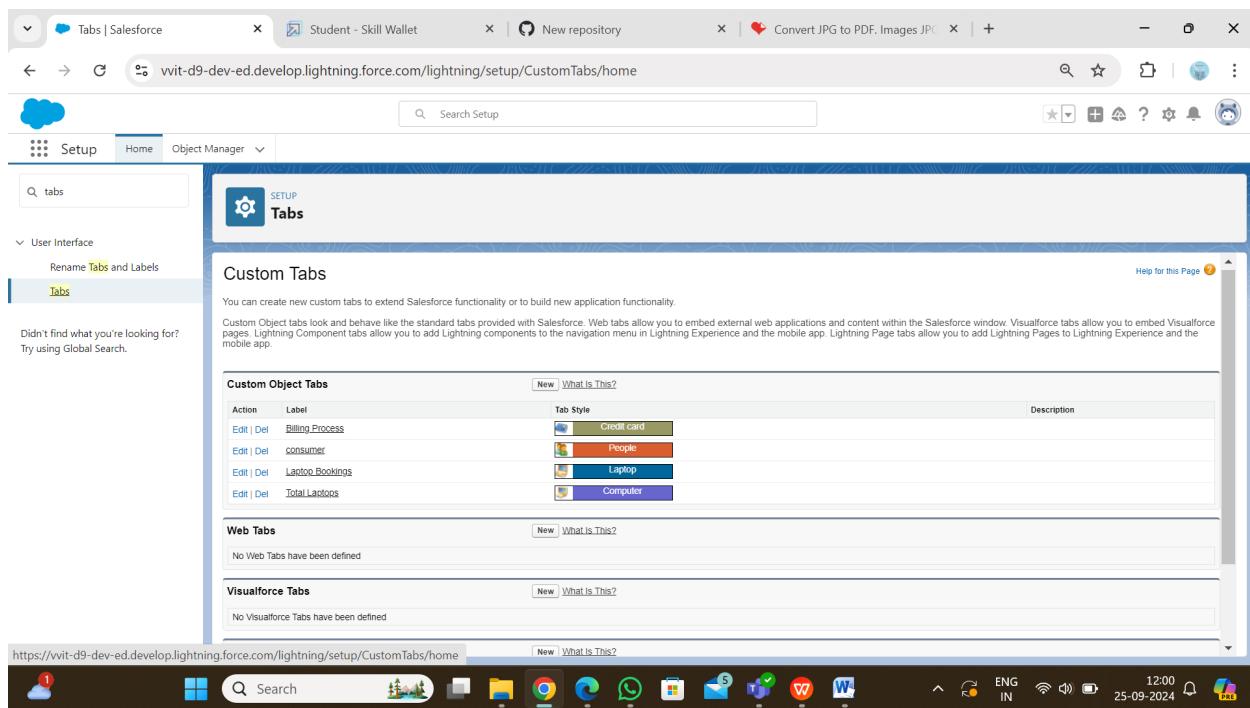
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Tabs:

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

Here I have created custom tabs for created objects.can be seen below



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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 efficiently by easily switching between apps.

Here I have created Laptop Rentals Lightning App and provided its default options and navigation items and it can be seen in below pictures.

The screenshot shows the Salesforce Lightning Experience App Manager interface. The left sidebar is collapsed, showing categories like 'Salesforce Mobile App', 'Data', 'Apps' (with 'App Manager' selected), 'Connected Apps', 'External Client Apps', 'Lightning Bolt', and 'Mobile Apps'. The main content area is titled 'Lightning Experience App Manager' and displays a table of 23 items. The table has columns for 'App Name', 'Developer Name', 'Description', 'Last Modified Date', 'App Type', and 'Visible...'. The 'LAPTOP_RENTALS' app is listed at the bottom of the table, developed by 'LightningInstrumentation'. The URL in the browser bar is <https://vvit-d9-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home>.

App Name ↑	Developer Name	Description	Last Modified Date	App Type	Visible...
1 All Tabs	AllTabSet	Build CRM Analytics dashboards and apps	22/09/2024, 12:57 pm	Classic	✓
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	22/09/2024, 12:57 pm	Classic	✓
3 App Launcher	AppLauncher	App Launcher tabs	22/09/2024, 12:57 pm	Classic	✓
4 Automation	FlowsApp	Automate business processes and repetitive tasks.	22/09/2024, 1:00 pm	Lightning	✓
5 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	22/09/2024, 12:59 pm	Lightning	✓
6 Community	Community	Salesforce CRM Communities	22/09/2024, 12:57 pm	Classic	✓
7 Content	Content	Salesforce CRM Content	22/09/2024, 12:57 pm	Classic	✓
8 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	22/09/2024, 12:57 pm	Lightning	✓
9 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	22/09/2024, 12:57 pm	Lightning	✓
10 LAPTOP_RENTALS	LAPTOP_RENTALS	View Adoption and Usage Metrics for Lightning Experience	23/09/2024, 6:43 pm	Lightning	✓
11 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	22/09/2024, 12:57 pm	Lightning	✓
12 Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	22/09/2024, 12:57 pm	Classic	✓
13 Platform	Platform	The fundamental Lightning Platform	22/09/2024, 12:57 pm	Classic	✓

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The screenshot shows the 'App Details & Branding' section of the Lightning App Builder. On the left, a sidebar lists 'App Options', 'Utility Items (Desktop Only)', 'Navigation Items', and 'User Profiles'. The main area contains fields for 'App Name' (LAPTOP RENTALS), 'Developer Name' (LAPTOP_RENTALS), and 'Description' (Enter a description...). It also includes sections for 'Image' (a small logo thumbnail) and 'Primary Color Hex Value' (#0070D2). Below these are 'Org Theme Options' and an 'App Launcher Preview' showing a desktop-style icon and the app name.

The screenshot shows the 'App Options' section of the Lightning App Builder. The sidebar remains the same. The main area is divided into three columns: 'Navigation and Form Factor' (with 'Navigation Style' set to 'Standard navigation' and 'Supported Form Factors' set to 'Desktop and phone'), 'Setup and Personalization' (with 'Setup Experience' set to 'Setup (full set of Setup options)' and 'App Personalization Settings' checkboxes for end user personalization, temporary tabs, and Omni-Channel sidebar), and a preview area showing a desktop interface with the app's branding.

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The screenshot shows the Lightning App Builder interface for a "LAPTOP RENTALS" application. The left sidebar has "Navigation Items" selected. The main area displays a "Navigation Items" configuration screen with two panels: "Available Items" and "Selected Items".

Available Items:

- Accounts
- All Sites
- Alternative Payment Methods
- Analytics
- App Launcher
- Appointment Categories
- Appointment Invitations
- Approval Requests
- Asset Action Sources
- Asset Actions
- Home Screen Widgets

Selected Items:

- Billing Process
- consumer
- Laptop Bookings
- Total Laptops

At the bottom, the Windows taskbar shows various pinned apps like File Explorer, Edge, and Word, along with system icons for battery, signal, and date/time.

The screenshot shows the Lightning App Builder interface for a "LAPTOP RENTALS" application. The left sidebar has "User Profiles" selected. The main area displays a "User Profiles" configuration screen with two panels: "Available Profiles" and "Selected Profiles".

Available Profiles:

- Agent
- Analytics Cloud Integration User
- Analytics Cloud Security User
- Authenticated Website
- Authenticated Website
- B2B Reordering Portal Buyer Profile
- Contract Manager
- Custom: Marketing Profile
- Custom: Sales Profile
- Custom: Support Profile
- Customer Community Login User

Selected Profiles:

- System Administrator

At the bottom, the Windows taskbar shows various pinned apps like File Explorer, Edge, and Word, along with system icons for battery, signal, and date/time.

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Fields

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

Types of Fields

1. Standard Fields
2. Custom Fields

Here I have created fields and relationships for all four objects which are total laptops,laptop bookings,consumer and billing process object.

We need to create field dependency for laptop booking to know core type of laptop.

The screenshot shows the Salesforce Object Manager interface for the 'consumer' object. The left sidebar contains navigation links for 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, List View Button Layout, Restriction Rules, and Scoping Rules. The main content area is titled 'Fields & Relationships' and displays a table with 8 items, sorted by Field Label. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are:

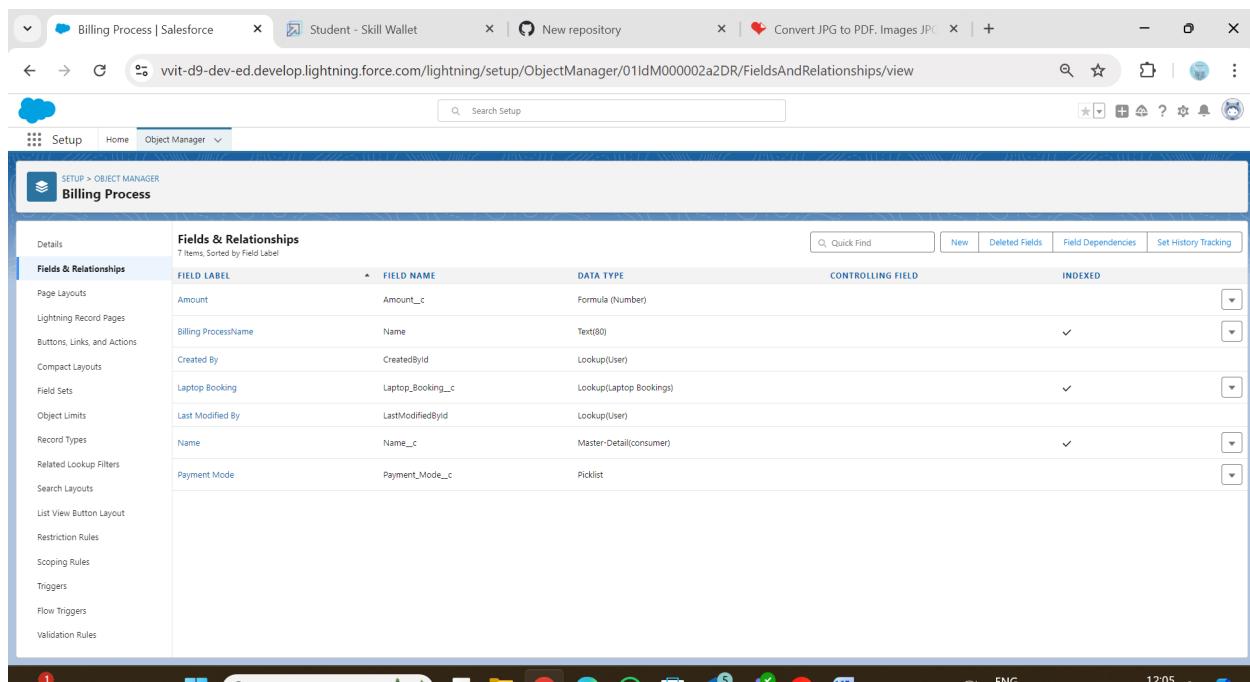
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Text Area(255)		
consumer_Status	consumer_Status__c	Picklist		
consumer_name	Name	Text(80)		
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)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

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The screenshot shows the Salesforce Object Manager interface for the 'Laptop Bookings' object. The left sidebar lists various setup categories like Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, etc. The main content area displays the 'Fields & Relationships' section with 11 items. The table includes columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status. Key fields shown include 'Amount', 'core type', 'Created By', 'Email', 'how many months', 'Laptop Bookings', 'Laptop names', 'Laptops Available', 'Last Modified By', 'Name', and 'Total No Of Laptops'. The 'core type' field is identified as the controlling field for the 'Laptop names' picklist.

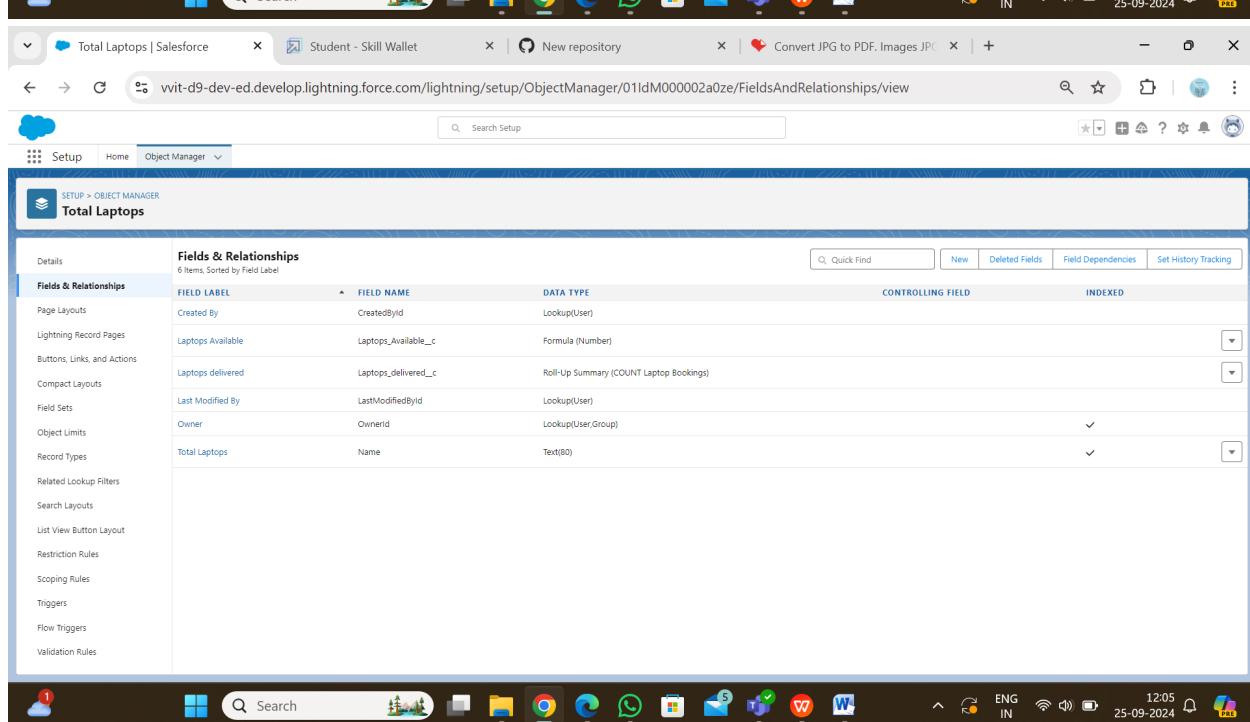
The screenshot shows the Salesforce Setup Home interface. The left sidebar lists various setup categories. The main content area shows the 'Edit Field Dependency' page for the 'core type' field, which is the controlling field for the 'Laptop names' picklist. The page includes instructions on how to manage dependencies using a grid view. The legend indicates that yellow cells represent 'Included Value' and grey cells represent 'Excluded Value'. The grid shows categories like Dell, Acer, HP, and Mac, each with sub-categories like Core i3, Core i5, Core i7, and Bionic chip. The 'Included Value' status is applied to specific cells in the grid.

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The screenshot shows the Salesforce Object Manager interface for the 'Billing Process' object. The left sidebar lists various setup categories like Page Layouts, Lightning Record Pages, and Field Sets. The main content area displays the 'Fields & Relationships' section with 7 items. The table includes columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount_c	Formula (Number)		
Billing ProcessName	Name	Text(80)		
Created By	CreatedById	Lookup(User)		
Laptop Booking	Laptop_Booking_c	Lookup(Laptop Bookings)		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name_c	Master-Detail(consumer)		
Payment Mode	Payment_Mode_c	Picklist		



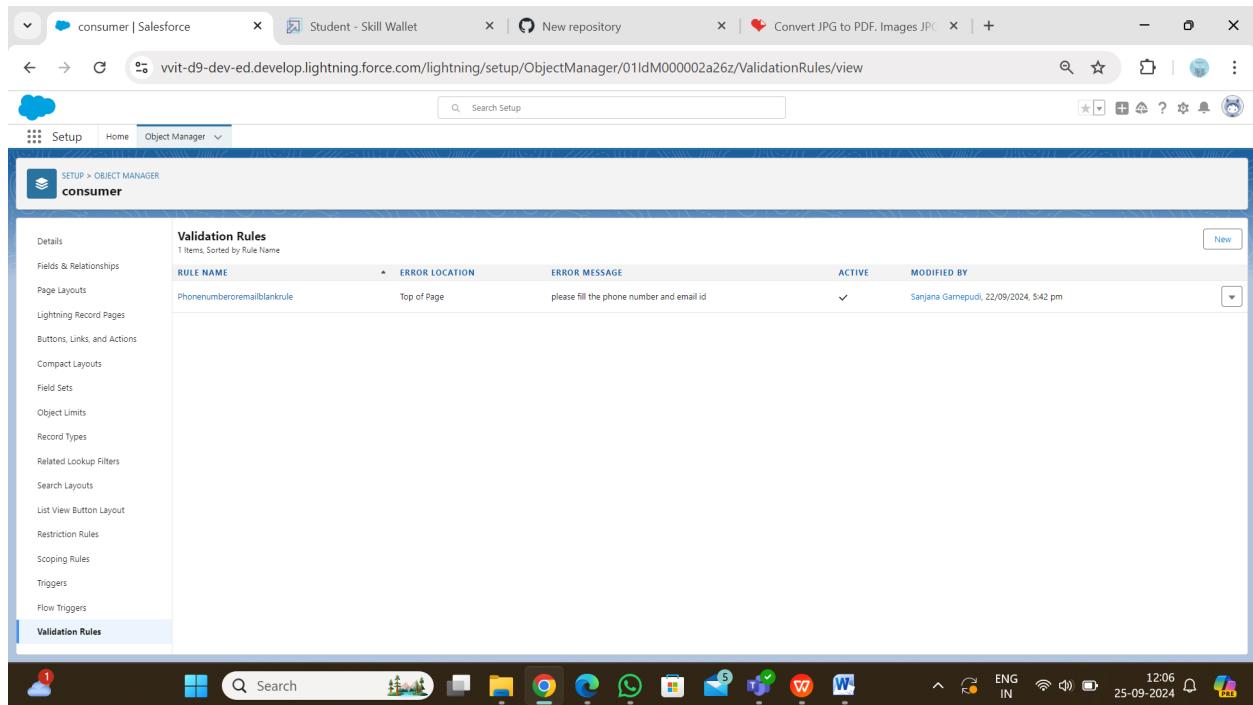
The screenshot shows the Salesforce Object Manager interface for the 'Total Laptops' object. The left sidebar lists various setup categories. The main content area displays the 'Fields & Relationships' section with 6 items. The table includes columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

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)		

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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 validation rule triggers an error message and prevents the user from saving the record until the issues are resolved.



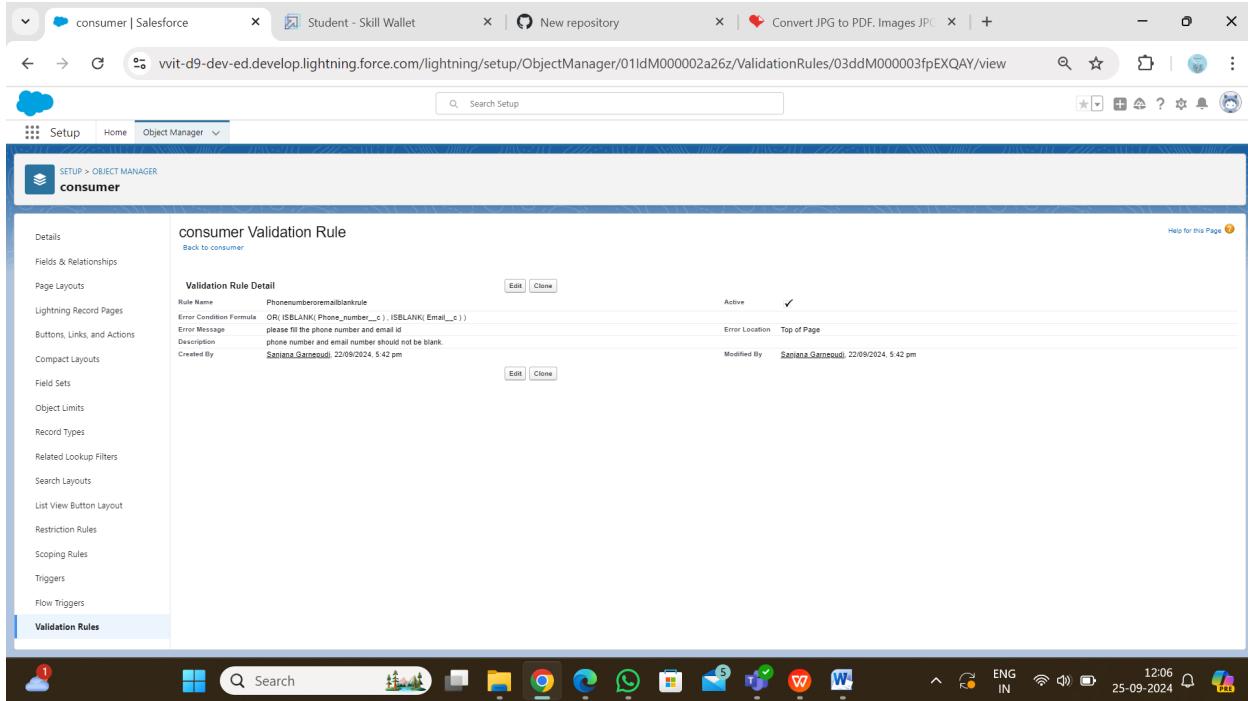
The screenshot shows the Salesforce Object Manager interface. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The main area is titled 'Validation Rules' and shows a single entry:

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Phonenumberoremailblankrule	Top of Page	please fill the phone number and email id	✓	Sanjana Garnepudi, 22/09/2024, 5:42 pm

In the above picture it shows the creation of validation rule for phone number field in consumer object.

In below picture we can see the details of validation rule for consumer object field.

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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 profiles by the user's job function. For example System Administrator, Developer, Sales Representative.

There are two types of profiles are there in salesforce They are:

1.Standard Profile:

We cannot deleted standard ones Each of these standard ones includes a default set of permissions for all of the standard objects available on the platform.

2.Custom Profile:

Custom ones defined by us. They can be deleted if there are no users assigned with that particular one.

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The screenshot shows the Salesforce Setup interface with the following details:

Profiles Page:

- The URL is `vvit-d9-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/home`.
- The page title is "Profiles".
- Search bar: "Search Setup" with "Q_profiles".
- Left sidebar: "Users" and "Profiles".
- Message: "Didn't find what you're looking for? Try using Global Search."
- Table header: "All Profiles" with columns "Action", "Profile Name", "User License", and "Custom".
- Table body: One row for "Salesforce" with "Edit | Del" and "Custom" checked.
- Page navigation: "1-1 of 1" and "0 Selected".
- Page footer: "Help for this Page" and "Page 1 of 1".

Profile Detail Page:

- The URL is `vvit-d9-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00edM000006wBMD`.
- The page title is "Profile: owner".
- Search bar: "Search Setup" with "Q_profiles".
- Left sidebar: "Users" and "Profiles".
- Message: "Didn't find what you're looking for? Try using Global Search."
- Section: "Profile Detail" with fields: "Name" (owner), "User License" (Salesforce), "Description", "Created By" (Sanjana Gamepudi), "Modified By" (Sanjana Gamepudi).
- Section: "Page Layouts" showing assignments for various objects like Global Layout, Location Group, Macro, Object Milestone, etc.
- Page footer: "Help for this Page" and "Page 1 of 1".

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The screenshot shows the Salesforce Setup interface with the following details:

Profiles Page:

- The URL is vvit-d9-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/home.
- The page title is "Profiles".
- The sub-header says "Profiles".
- The search bar contains "profiles".
- The left sidebar shows "Users" and "Profiles".
- The main content area displays a table of profiles:

Action	Profile Name	User License	Custom
Edit Del ...	Agent	Salesforce Platform	<input checked="" type="checkbox"/>
Edit Clone	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
Edit Clone	Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>

Page navigation: 1-5 of 5 | 0 Selected | < Previous | Next > | Page 1 of 1

Agent Profile Page:

 - The URL is vvit-d9-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00edM000006wBjT.
 - The page title is "Profile Agent".
 - The sub-header says "Agent".
 - The search bar contains "Search Setup".
 - The left sidebar shows "Users" and "Profiles".
 - The main content area displays the "Profile Detail" section for the "Agent" profile:

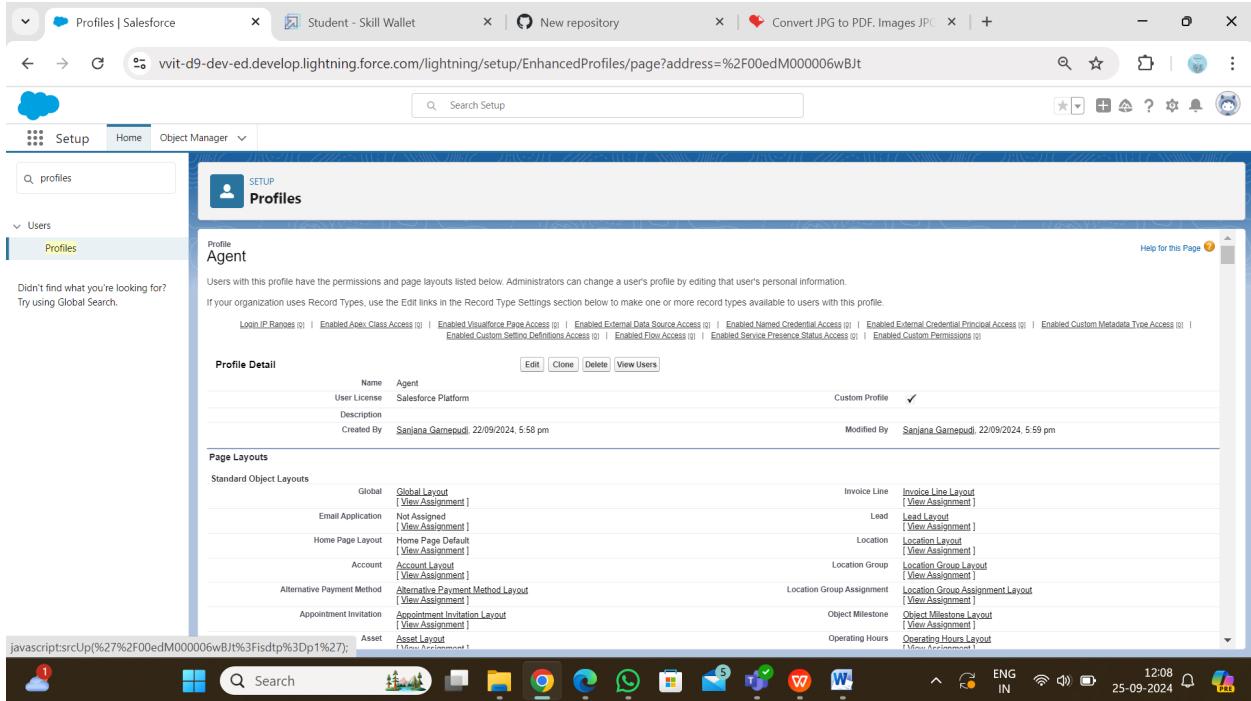
Name	Agent	Custom Profile
User License	Salesforce Platform	<input checked="" type="checkbox"/>
Description		
Created By	Sanjana Gamepudi 22/09/2024, 5:58 pm	Modified By Sanjana Gamepudi 22/09/2024, 5:59 pm

 - The "Page Layouts" section shows global layouts for various objects:

Object	Global Layout	Invoice Line Layout
Email Application	Not Assigned [View Assignment]	Lead Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Location Layout [View Assignment]
Account	Assignment [View Assignments]	Location Group Assignment [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Object Milestone Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]	Operating Hours Layout [View Assignment]
Asset	Asset Layout [View Assignment]	

JavaScript code at the bottom: `javascript:srcUp(%27%2F00edM000006wBjT%3FisdtP%3Dp1%27);`

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Roles and Hierarchy

A role in Salesforce defines a user's visibility access at the record level. Roles may be used 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. Here I have created roles for owner and Agent.

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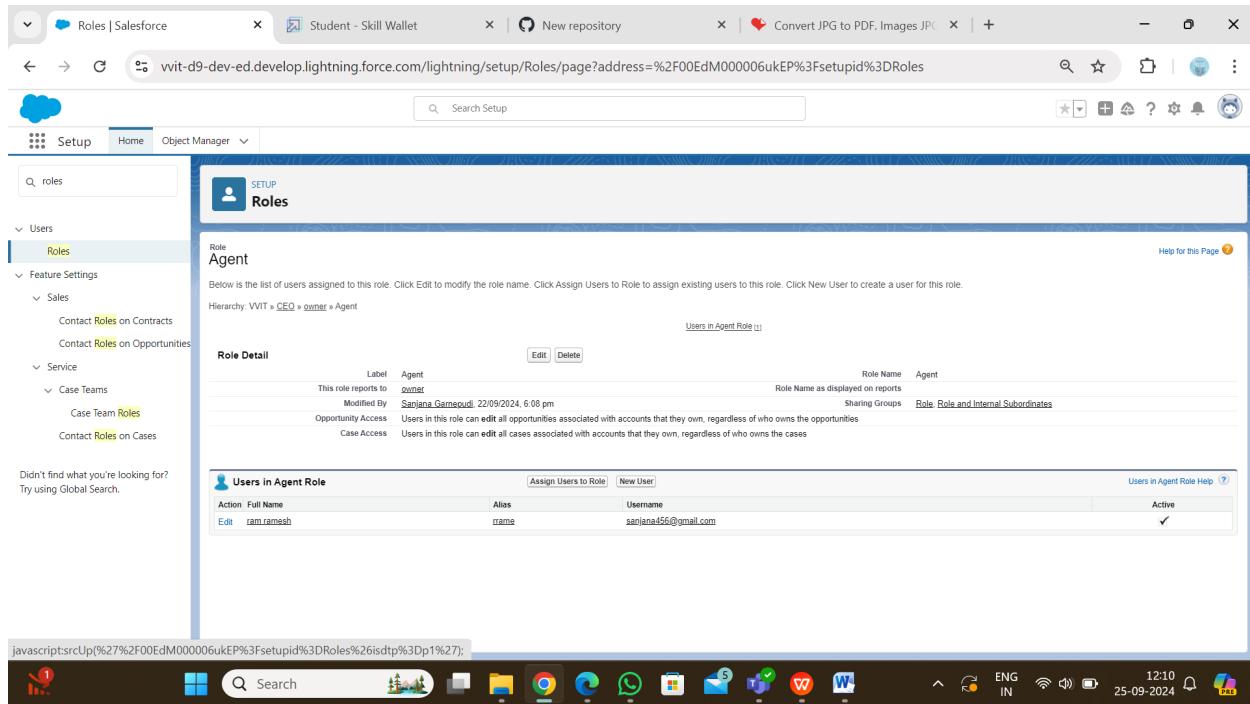
Screenshot 1: Creating the Role Hierarchy

The screenshot shows the 'Roles' page in the Salesforce Setup. The sidebar on the left lists categories like Sales, Service, and Case Teams, with 'Sales' expanded to show 'Contact Roles on Contracts' and 'Contact Roles on Opportunities'. The main content area is titled 'Creating the Role Hierarchy' and displays a tree view of roles under 'Your Organization's Role Hierarchy'. The tree starts with 'VWIT' at the root, which branches into 'CEO', 'COO', 'owner', and 'SVP, Customer Service & Support'. Each node has 'Edit', 'Delete', and 'Assign' buttons. A 'Help for this Page' link is in the top right.

Screenshot 2: Role Detail for owner

This screenshot shows the 'Role Detail' section for the 'owner' role. It includes fields for 'Label' (owner), 'This role reports to' (CEO), 'Modified By' (Sanjana Gameoudi), 'Opportunity Access' (Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities), and 'Case Access' (Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases). Below this is a table for 'Users in owner Role' with one entry: 'vicky_rushii' (Full Name: vicky_rushii, Alias: vrush, Username: sanjana0@gmail.com, Active: checked). Buttons for 'Edit', 'Assign Users to Role', and 'New User' are at the top of the table. A 'Help for this Page' link is in the top right.

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

In this user profile I have created both owner and agent user profiles .In the below tabs we can see the details of both user profiles.

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All Users

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. [Let's Go](#)

View: [All Users](#) | [Edit](#) | [Create New View](#)

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatty0ddm00000cpvouka589sulf95d1@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
Edit	Sanjana	SSGan	sanjana@vit.com		<input checked="" type="checkbox"/>	System Administrator
Edit	Gameoudi	ram	sanjana456@gmail.com	Agent	<input checked="" type="checkbox"/>	Standard Platform User
Edit	vrush	vrush	sanjana00@gmail.com	owner	<input checked="" type="checkbox"/>	Standard User
Edit	User Integration	integ	integration@0ddm00000cpvouka5.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Edit	User Security	sec	insightssecurity@0ddm00000cpvouka5.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

New User | Reset Password(s) | Add Multiple Users

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

User Detail

Name: vicky rushi | Alias: vrush | Email: nameousdianana@gmail.com | Username: sanjanato@gmail.com

Role: owner | Profile: Standard User

Active:

Marketing User: | Offline User: | Knowledge User:

Flow User: | Service Cloud User: | Site.com Contributor User: | Site.com Publisher User: | WCC User:

Mobile Push Registrations: | Data.com User Type:

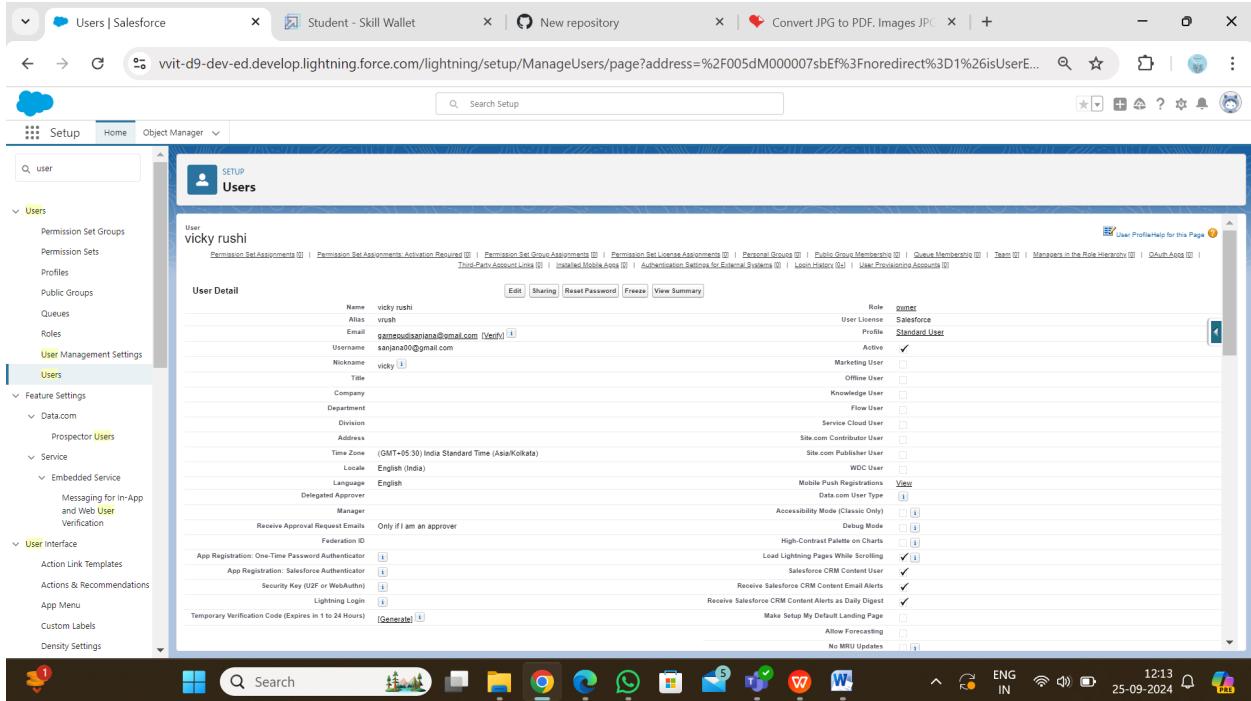
Accessibility Mode (Classic Only): | Debug Mode: | High-Contrast Pallete on Charts:

Load Lightning Pages While Scrolling: | Salesforce CRM Content User: | Receive Salesforce CRM Content Email Alerts:

Receive Salesforce CRM Content Alerts as Daily Digest: | Make Setup My Default Landing Page: | Allow Forecasting: | No MRU Updates:

Temporary Verification Code (Expires in 1 to 24 Hours): [Generate](#)

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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 coding knowledge.

In salesforce the flows contains elements like Auto lunched folws, Flow template ,Flow builder etc.

In this project I have created Record Triggered flow naming Laptop Distributions.

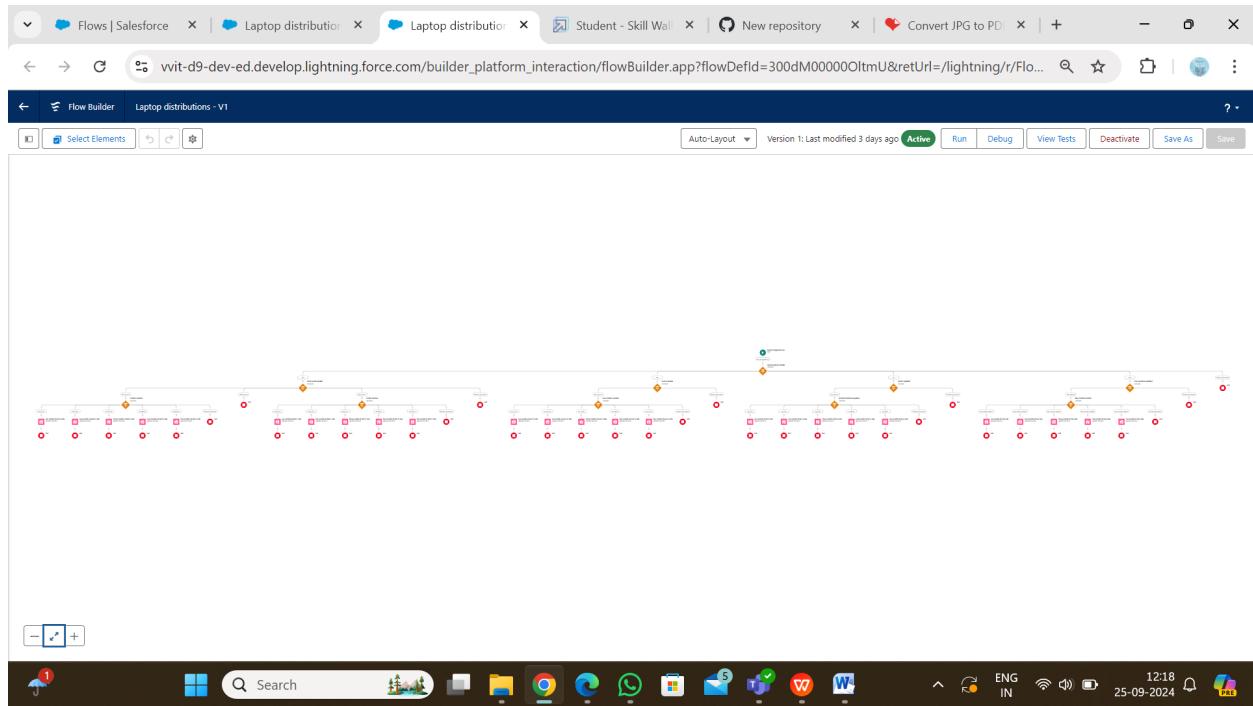
In the below pictures you can see the details of flows and structure of the flow.I have created flows for all four Laptops like dell,HP, Acer and Mac book and they have types like Core types like i3,i5 and i7 it also includes bionic chip.And created details for how much money need to pay for how many months.

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The screenshot shows the Salesforce Home page with the Flows tab selected. The main content area displays a table titled "Recently Modified" with one item: "Laptop distributions" (Flow Label), which is "Activated". Below this, there are two promotional sections: "Join the Flow Community" and "Learn About Salesforce Flow". On the right side, there is a table titled "Flows" with a single row labeled "Errored Flows" followed by the message "No items to display". The browser's address bar shows the URL: vvit-d9-dev-ed.develop.lightning.force.com/lightning/page/home. The system status bar at the bottom indicates the time is 12:18 and the date is 25-09-2024.

The screenshot shows the details page for the flow "Laptop distributions". The top navigation bar includes links for "Open Flow", "Open Latest Version", and "Change Owner". The flow's details are listed in a table: Type (Run After Save), Associated Record (22/09/2024, 8:27 pm), Progress Status (Activated), Last Modified Date (22/09/2024, 8:27 pm), and Flow Owner (Sanjana Garne...). The "Details" tab is selected, showing the flow's configuration. The "Information" section contains fields for Flow Label (Laptop distributions), API Name (Laptop_distributions), Flow Type (Record-Triggered After Save Flow), and various dates/times. The "Related" section lists the flow's association with the record it was created for. The browser's address bar shows the URL: vvit-d9-dev-ed.develop.lightning.force.com/lightning/r/FlowRecord/2aFdM000002bZthUAE/view. The system status bar at the bottom indicates the time is 12:18 and the date is 25-09-2024.

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APEX

Apex OverView

Apex is a strongly typed, object-oriented programming language that allows developers to execute flow and transaction control statements on the Lightning platform server in conjunction with calls to the Lightning Platform API. Using syntax that looks like Java and acts like database stored procedures, Apex enables developers to add business logic to most system events, including button clicks, related record updates, and Visualforce pages. Apex code can be initiated by Web service requests and from triggers on objects. In this salesforce project I have created one apex class and an apex trigger class and can be seen in the below pictures. Apex class has created for LaptopBookingHandler and Trigger class is created for LaptopBooking. The both programs can be seen in the below pictures provided.

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The screenshot shows the Salesforce Setup interface under the Apex Classes section. The main content area displays the details for the 'LaptopBookingHandler' class. The class is listed in the main table with the following information:

Action	Name	Namespace Prefix	Api Version	Status	Size Without Comments	Last Modified By	Has Trace Flags
Edit Del Security	LaptopBookingHandler		61.0	Active	893	Sanjana Gameudi	25/09/2024, 12:22 pm

Below the main table, there is a section titled 'Dynamic Apex Classes' which currently shows 'No records to display'.

The screenshot shows the Google Chrome Developer Console with the URL `https://vvit-d9-dev-ed.develop.lightning.force.com/lightning/setup/ApexClasses/home`. The developer console is displaying the code for the 'LaptopBookingHandler.apxc' file. The code is as follows:

```
1 public class LaptopBookingHandler {
2
3     public static void sendEmailNotification (List<Laptop_Bookings__c> lapList){
4
5         for(Laptop_Bookings__c lap:lapList)
6
7     {
8
9         Messaging.SingleEmailMessage email = new Messaging.SingleEmailMessage();
10
11         email.setToAddresses( new List<String>{lap.Email__c});
12
13         email.setSubject('Welcome to our company');
14
15         string body = 'Dear ' +lap.Name +', \n';
16
17         body += 'Welcome to Laptop Rentals! You have been seen as a valuable customer to us.\n Please continue your';
18
19         email.setPlainTextBody(body);
20 }
```

The developer console also includes tabs for Logs, Tests, Checkpoints, Query Editor, View State, Progress, and Problems. The Problems tab is currently selected.

A CRM APPLICATION FOR LAPTOP RENTALS

The screenshot shows the Salesforce Setup interface under the Apex Triggers section. The URL in the browser is vvit-d9-dev-ed.develop.lightning.force.com/lightning/setup/ApexTriggers/home. The page displays a table of triggers, with one entry visible:

Action	Name	Namespace Prefix	sObject Type	API Version	Status	Size Without Comments	Last Modified By	Has Trace Flags
Edit	LaptopBooking		Laptop_Bookings	61.0	Active	220	Sanjana Gameouli	23/09/2024 9:05 am

The screenshot shows the Google Chrome Developer Console with the URL vvit-d9-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage. The code editor displays the Apex trigger `LaptopBooking.apxt`:

```
trigger LaptopBooking on Laptop_Bookings__c (After insert,after update) {
    if(trigger.isAfter && ( trigger.isInsert || trigger.isupdate))
    {
        LaptopBookingHandler.sendEmailNotification(trigger.new);
    }
}
```

A CRM APPLICATION FOR LAPTOP RENTALS

The screenshot shows the Salesforce Lightning interface with the URL vvit-d9-dev-ed.lightning.force.com/lightning/o/Report/home?queryScope=mru. The page title is "LAPTOP RENTALS". The left sidebar has sections for Reports (Recent, Created by Me, private Reports, public Reports, All Reports), Folders (All Folders, Created by Me, Shared with Me), and Favorites (All Favorites). The main content area displays a table of reports. The table columns are: Report Name, Description, Folder, Created By, Created On, and Subscribed. One report is visible: "consumer with Laptop Bookings and total" (Description: "Which flows run, what's the status of each interview, and how long do users take to complete the screens?"), created by Sanjana Garnepudi on 23/9/2024 at 4:47 pm, in the Private Reports folder.

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, and share 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 create reports 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. Tabular
2. Summary
3. Matrix
4. Joined Reports

In this project I have created a report with name "consumer with Laptop Bookings and total laptops" and later it shared with owner everyday at certain time to know the total laptop bookings for a day and total cost.

A CRM APPLICATION FOR LAPTOP RENTALS

This screenshot shows the Salesforce Lightning interface for a CRM application focused on laptop rentals. The top navigation bar includes tabs for 'Reports | Salesforce', 'Laptop distribution', 'Student - Skill Wall', 'New repository', and 'Convert JPG to PDF'. The main content area displays a list of reports under the 'Recent' category. The report table has columns for Report Name, Description, Folder, Created By, Created On, and Subscribed. One report is visible: 'consumer with Laptop Bookings and total' created by Sanjana Gardepudi on 23/9/2024 at 4:47 pm. The sidebar on the left provides navigation links for Reports, Folders, and Favorites. The bottom of the screen shows the Windows taskbar with various pinned icons.

This screenshot shows the Salesforce Lightning interface with the 'Edit Subscription' dialog open over a report. The report title is 'consumer with Laptop Bookings and Total Laptops consumer with Laptop Bookings and total'. The dialog allows setting a frequency (Daily, Weekly, Monthly), time (8:00 pm), and recipient (Sanjana Gardepudi). The background report table shows data for 10 records with a total amount of ₹47,800. The bottom of the screen shows the Windows taskbar with various pinned icons.

A CRM APPLICATION FOR LAPTOP RENTALS

Dashboards

Dashboards help you visually understand changing business conditions so you can make 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, review these dashboard basics.

In the below picture you can see the dashboard with name Data analytics of laptops which provides a pie chart representation of laptops that are basic ,intermediate and High.

if cost<=900 =basic
cost is From 900 to 1500 =Intermediate
cost from 1500 to 3000 = high
cost from 3000 to 10000 = very high

The screenshot shows a Salesforce Lightning interface for a dashboard named 'Data analytics of laptops'. The dashboard details are as follows:

Dashboard Name	Description	Folder	Created By	Created On	Subscribed
data analytics of laptops	total amount of data in dashboards	total rent amount	Sanjana Gamepudi	23/9/2024, 4:59 pm	

The sidebar on the left lists recent dashboards, folders, and favorites. The bottom of the screen shows the Windows taskbar with various application icons.

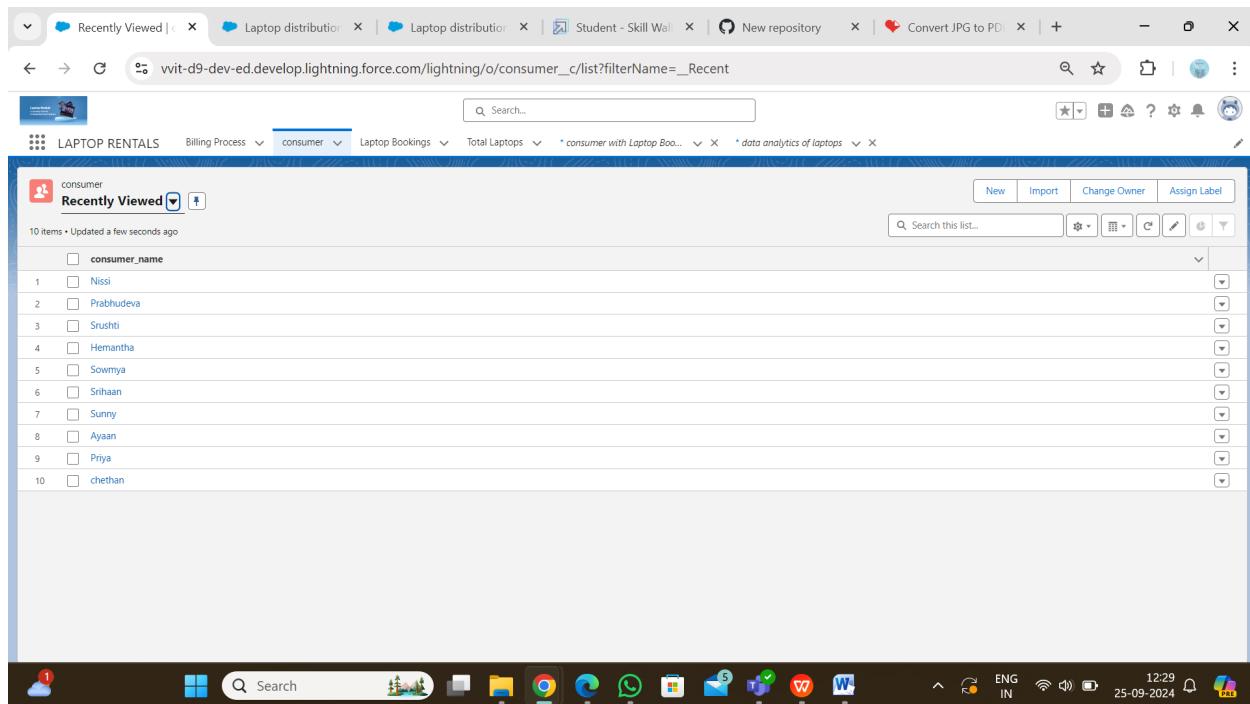
A CRM APPLICATION FOR LAPTOP RENTALS

The screenshot shows a CRM application interface with a top navigation bar containing multiple tabs. The active tab is 'data analytics of laptops'. Below the navigation bar is a search bar and a toolbar with various icons. The main content area features a large pie chart titled 'consumer with Laptop Bookings and total' with a value of ₹48k. To the right of the chart, there's a legend for 'Types of versions' with categories: High (blue), Intermediate (light blue), and Other (purple). Below the chart is a link to 'View Report (consumer with Laptop Bookings and total)'. The bottom of the screen shows a taskbar with various application icons and system status indicators.

Here I have created record for laptop bookins,Consumer and total objects.

The screenshot shows a CRM application interface with a top navigation bar containing multiple tabs. The active tab is 'Laptop Bookings'. Below the navigation bar is a search bar and a toolbar with various icons. The main content area displays a list titled 'Recently Viewed' under the 'Laptop Bookings' tab. The list contains 10 items, each with a checkbox and a name: 1. Smartintern, 2. Smartintern, 3. Smartbridge, 4. Medico, 5. techhub, 6. codetech, 7. Smartbridge, 8. Salesforce, 9. Code Hub, and 10. Sandeep. To the right of the list is a search bar labeled 'Search this list...' and a set of filter and sorting icons. The bottom of the screen shows a taskbar with various application icons and system status indicators.

A CRM APPLICATION FOR LAPTOP RENTALS



The screenshot shows a web browser window with multiple tabs open, including 'Recently Viewed', 'Laptop distribution', 'Student - Skill Wall', 'New repository', and 'Convert JPG to PDF'. The main content area displays a list titled 'consumer' under 'Recently Viewed'. The list contains 10 items, each with a checkbox and a consumer name: 1. Nissi, 2. Prabhudeva, 3. Srushti, 4. Hemantha, 5. Sowmya, 6. Srihaan, 7. Sunny, 8. Ayaan, 9. Priya, 10. chethan. The interface includes a search bar, a toolbar with buttons for New, Import, Change Owner, and Assign Label, and a footer with system icons.

Here I have provided a email which Is been sent to the people who bought laptop .It describes laptop name ,core type and total amount fo renting the laptop.
And in the last picture it is sent to the owner to share the report regarding laptops.



Sanjana Garnepudi <garnepudisanjana@gmail.com>

23-09-2024 15:55



To: garnepudisanjana@gmail.com

Dear SmartInternz,

Welcome to Laptop Rentals! You have been seen as a valuable customer to us.

Please continue your journey with us, while we try to provide you with good quality resources.

Laptop Amount = 2000.0

core type = Core i7

Laptop type = Dell

A CRM APPLICATION FOR LAPTOP RENTALS

consumer with Laptop Bookings and total

As of 23/9/24 at 8:00 PM · Viewing as Sanjana Garnepudi

[OPEN IN SALESFORCE](#)

Details

Filters

My consumerconsumer: Created Date: All time

Summary

Total Records Total Amount

10 ₹47,800

Types of versions↑	consumer: consumer_name↑	Laptop Bookings: Laptop Bookings	Laptop names	core type	Total No Of Laptops: Total Laptops	Amount Sum	Phone number	Address	Email
Basic (1 record)	Prabhudeva (1 record)	Smartbridge	Acer	core i3	50	₹900	9392675324	Chennai	garnepudigovardhanrao@gmail.com
						₹900			
						₹900			
Intermediate (4 records)	Ayaan (1 record)	Smartinternz	Dell	Core i7	2	₹2,000	9392296055	Balaji nagar,Hyderabad	ayaan12@mail.com
						₹2,000			
	Priya (1 record)	Code Hub	Acer	core i3	50	₹2,700	8008052137	Brundavan Gardens,Guntur	priya15@gmail.com
						₹2,700			
	Sowmya (1 record)	Smartinternz	Dell	Core i7	50	₹2,000	7341634992	SVN colony ,Guntur	garnepusanjana@gmail.com
						₹2,000			
	Srushthi (1 record)	techhub	Dell	core i3	50	₹3,000	9502300814	Hyderabad	garnepusanjana7123@gmail.com
						₹3,000			
						₹9,700			
High (5 records)	Hemantha (1 record)	Smartbridge	Hp	Core i5	50	₹8,500	6302269060	Guntur	nelapatihemantha00@gmail.com
						₹8,500			
	Nissi (1 record)	Medico	Dell	Core i7	50	₹10,000	9392296055	Banglore	nissi@gmail.com
						₹10,000			
	Sowmya (1 record)	Sandeep	Mac	Bionic chip	50	₹6,800	7341634992	SVN colony ,Guntur	garnepusanjana@gmail.com
						₹6,800			
	Srihaan (1 record)	Salesforce	Hp	Core i5	50	₹5,100	9502300814	Church street ,chennai	srihaan23@sales.com
						₹5,100			