

A CRM APPLICATION FOR LAPTOP RENTALS

# A CRM APPLICATION FOR LAPTOP RENTALS

prepared by

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## A CRM APPLICATION FOR LAPTOP RENTALS

### Object Creation:

Salesforce objects are database tables that permit you to store data that is specific to an organization. I have created four objects Total Laptops, Consumer, Laptop Bookings, Billing Process.

### Total Laptops Object:

The image shows two screenshots of the Salesforce Object Manager interface. The top screenshot displays a list of objects, and the bottom screenshot shows the detailed configuration for the 'Total Laptops' object.

**Top Screenshot: Object Manager List**

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Total Laptops	Total_Laptops__c	Custom Object		24/09/2024	✓

**Bottom Screenshot: Total Laptops Object Details**

**Details**

Description

API Name: Total\_Laptops\_\_c

Custom

✓

Singular Label: Total Laptops

Plural Label: Total Laptops

Total Laptops

Enable Reports: ✓

Track Activities: ✓


Track Field History: ✓

Deployment Status: Deployed








Help Settings

Standard salesforce.com Help Window

# A CRM APPLICATION FOR LAPTOP RENTALS



Search Setup



SetupHomeObject Manager

SETUP > OBJECT MANAGER

Total Laptops

Details

Fields & Relationships

6 Items, Sorted by Field Label


Quick Find

NewDeleted FieldsField DependenciesSet History Tracking








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	Name	Text(80)		✓

Restriction Rules

## consumer Object:



Search Setup



SetupHomeObject Manager

SETUP > OBJECT MANAGER

consumer

Details

Details

EditDelete

Description

API Name

consumer\_\_c

Custom

✓

Singular Label

consumer

Plural Label

consumer

Enable Reports

✓

Track Activities

Track Field History

✓


Deployment Status

Deployed








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Standard salesforce.com Help Window

# A CRM APPLICATION FOR LAPTOP RENTALS



Search Setup



SetupHomeObject Manager

SETUP > OBJECT MANAGER  
**consumer**

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

Fields & Relationships


9 Items, Sorted by Field Label

Quick Find








NewDeleted FieldsField DependenciesSet History Tracking

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		
Record Type	RecordTypeId	Record Type		✓

## Laptop Bookings Object:



Search Setup



SetupHomeObject Manager

SETUP > OBJECT MANAGER  
**Laptop Bookings**

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

Details

EditDelete

Description

API Name  
Laptop\_Bookings\_\_c

Custom  
✓

Singular Label  
Laptop Bookings

Plural Label  
Laptop Bookings

Enable Reports  
✓


Track Activities

Track Field History  
✓








Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

# A CRM APPLICATION FOR LAPTOP RENTALS



Search Setup



SetupHomeObject Manager

SETUP > OBJECT MANAGER  
**Laptop Bookings**

Details


**Fields & Relationships**  
11 Items, Sorted by Field Label

Quick Find








NewDeleted FieldsField DependenciesSet History Tracking

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)		
how many months	how_many_months__c	Picklist		
Laptop Booking	Laptop_Booking__c	Email		
Laptop Bookings Name	Name	Text(80)		✓
Laptop names	Laptop_type__c	Picklist		
Laptops Available	Laptops_Available__c	Formula (Number)		

## Billing Process Object:



Search Setup



SetupHomeObject Manager

SETUP > OBJECT MANAGER  
**Billing Process**

Details

**Details**

EditDelete

Description

API Name  
Billing\_Process\_\_c  
Custom  
✓  
Singular Label  
Billing Process  
Plural Label  
Billing Process

Enable Reports  
✓  
Track Activities  
  
Track Field History  
✓  
Deployment Status  
Deployed  
Help Settings  
Standard salesforce.com Help Window

## A CRM APPLICATION FOR LAPTOP RENTALS

The screenshot shows the Salesforce Setup interface for the 'Billing Process' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main content area is titled 'Fields & Relationships' and shows a table of 7 items. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are: Amount (Formula (Number)), Billing Process Name (Text(80)), Created By (Lookup(User)), Laptop Bookings (Lookup(Laptop Bookings)), Last Modified By (Lookup(User)), Name (Master-Detail(consumer)), and Payment Mode (Picklist).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Number)		
Billing Process Name	Name	Text(80)		✓
Created By	CreatedBy	Lookup(User)		
Laptop Bookings	Laptop_Bookings__c	Lookup(Laptop Bookings)		✓
Last Modified By	LastModifiedBy	Lookup(User)		
Name	Name__c	Master-Detail(consumer)		✓
Payment Mode	Payment_Mode__c	Picklist		

Tabs:

Create consumer Object:

I have created four tabs for the objects which are created above.

The screenshot shows the Salesforce Setup interface for the 'Tabs' page. The left sidebar contains a navigation menu with options like Setup, Home, Object Manager, and Tabs (selected). The main content area is titled 'Custom Tabs' and shows a table of 4 items. The table has columns for Action, Label, Tab Style, and Description. The tabs listed are: Billing Process (Real Estate Skin), consumer (Books), Laptop Bookings (Desk), and Total Laptops (Big Top).

Action	Label	Tab Style	Description
Edit   Del	Billing Process	Real Estate Skin	
Edit   Del	consumer	Books	
Edit   Del	Laptop Bookings	Desk	
Edit   Del	Total Laptops	Big Top	

## A CRM APPLICATION FOR LAPTOP RENTALS

### Create a Lightning App:

I have created a Lightning App with name Laptop Rentals and I upload a image and add navigation items.

The screenshot displays the Salesforce Lightning Experience App Manager and the Lightning App Builder interface. The top section shows the App Manager with a list of 23 items, including 'LAPTOP RENTALS'. The bottom section shows the App Builder settings for 'LAPTOP RENTALS'.

**Lightning Experience App Manager**

23 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

	App Name ↑	Developer Name	Description	Last Modified Date	App Type	Visibl...	
6	Community	Community	Salesforce CRM Communities	24/09/2024, 4:07 pm	Classic	✓	▼
7	Content	Content	Salesforce CRM Content	24/09/2024, 4:07 pm	Classic	✓	▼
8	Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	24/09/2024, 4:07 pm	Lightning	✓	▼
9	Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	24/09/2024, 4:07 pm	Lightning	✓	▼
10	LAPTOP RENTALS	LAPTOP_RENTALS		26/09/2024, 6:54 pm	Lightning	✓	▼
11	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	24/09/2024, 4:07 pm	Lightning	✓	▼
12	Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	24/09/2024, 4:07 pm	Classic	✓	▼
13	Platform	Platform	The fundamental Lightning Platform	24/09/2024, 4:07 pm	Classic		▼
14	Queue Management	QueueManagement	Create and manage queues for your business.	24/09/2024, 4:07 pm	Lightning	✓	▼
15	Sales	Sales	The world's most popular sales force automation (SFA) solution	24/09/2024, 4:07 pm	Classic		▼
16	Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	24/09/2024, 4:07 pm	Lightning	✓	▼
17	Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one...	24/09/2024, 4:07 pm	Lightning	✓	▼

**App Settings**

**App Details & Branding**

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

**App Details**

\* App Name ⓘ  
LAPTOP RENTALS

\* Developer Name ⓘ  
LAPTOP\_RENTALS

Description ⓘ  
Enter a description...

**App Branding**

Image ⓘ  
[Image of a laptop with a red arrow pointing to it]

Primary Color Hex Value ⓘ  
#0070D2

Org Theme Options  
☐ Use the app's image and color instead of the org's custom theme

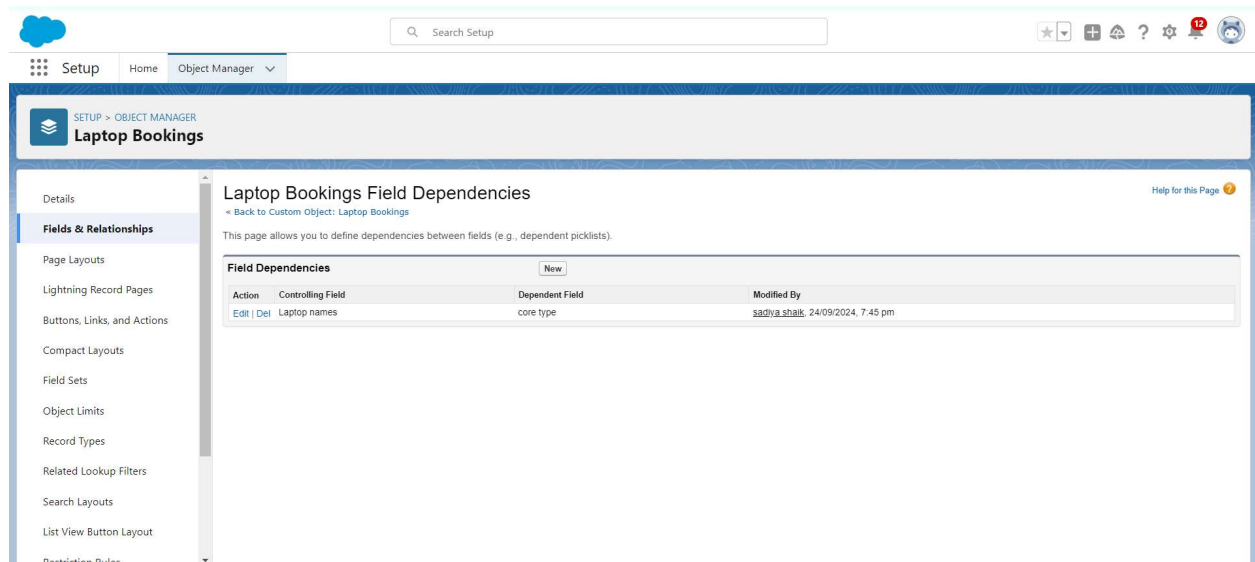
**App Launcher Preview**

[Image of the app launcher icon] LAPTOP RENTALS

## A CRM APPLICATION FOR LAPTOP RENTALS

### Fields:

**Creating the field :** I have created a field name Laptop names. The fields shown in below figure.



**Validation rule:** I have created a validation rule for phone number field for consumer object which is shown in below figure.



## A CRM APPLICATION FOR LAPTOP RENTALS

The screenshot shows the Salesforce Setup interface for the 'consumer' object. The left sidebar contains navigation links: 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 is titled 'Validation Rules' and shows 1 item, sorted by Rule Name. The table below lists the validation rule.

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Phonenumberoremailblankrule	Top of Page	please fill the phone number and email id	✓	sadiya shaik, 25/09/2024, 8:30 am

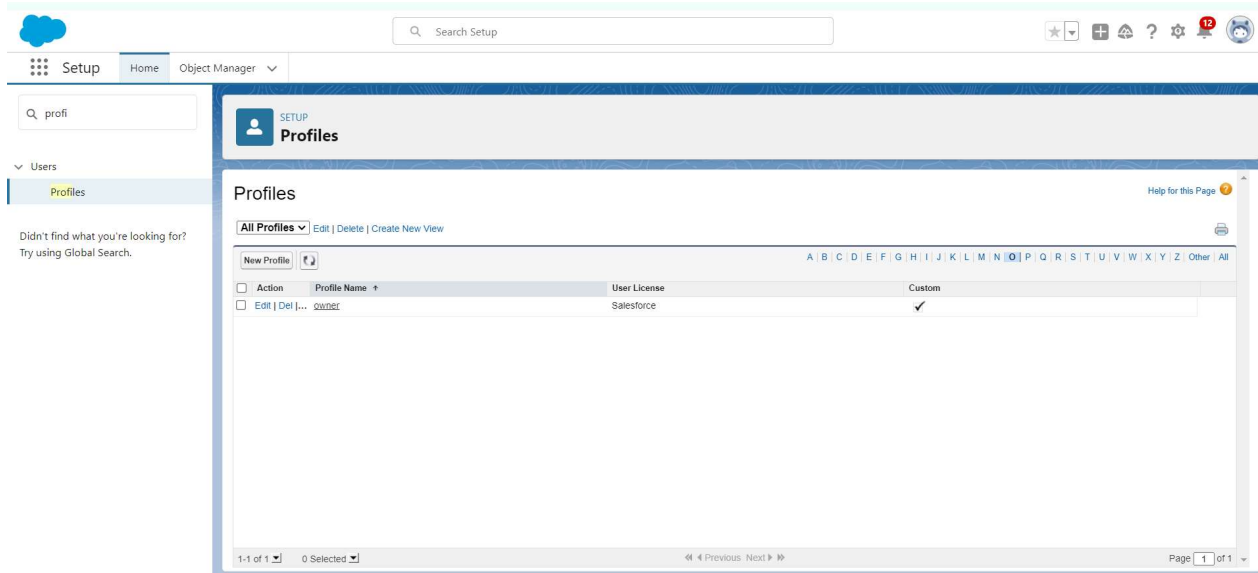
## Profiles:

owner Profile: I have created a owner profile shown in below figure.

The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The left sidebar contains navigation links: Users, Profiles, and a search bar. The main content area is titled 'Profiles' and shows a list of profiles. The table below lists the profiles.

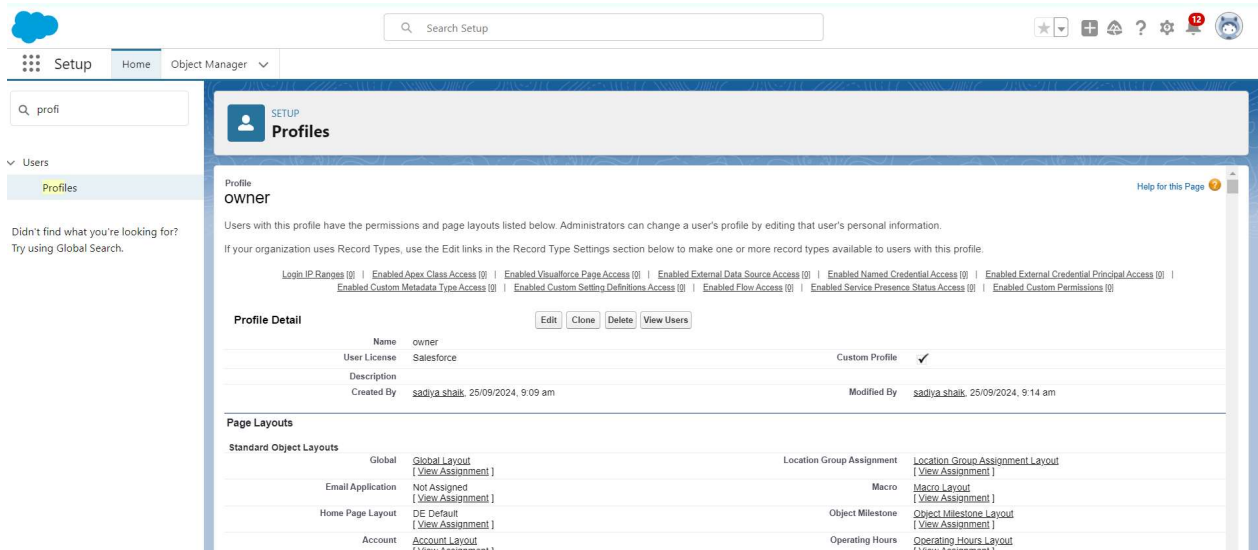
Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit   Del   ...	Agent	Salesforce Platform	✓
<input type="checkbox"/> Edit   Clone	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/> Edit   Del   ...	B2B Reordering Portal Buyer Profile	External Apps Login	✓
<input type="checkbox"/> Edit   Clone	Chatter External User	Chatter External	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Chatter Free User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Contract Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Cross Org Data Proxy User	XOrg Proxy User	<input type="checkbox"/>
<input type="checkbox"/> Edit   Del   ...	Custom_Marketing_Profile	Salesforce	✓
<input type="checkbox"/> Edit   Del   ...	Custom_Sales_Profile	Salesforce	✓

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The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with "profi" and a "Profiles" link under the "Users" section. The main content area is titled "Profiles" and shows a table of profiles. The table has columns for "Action", "Profile Name", "User License", and "Custom". One profile named "owner" is listed with a "Salesforce" user license and a checked "Custom" checkbox. The page includes navigation links like "All Profiles", "Edit", "Delete", and "Create New View".

Action	Profile Name	User License	Custom
<a href="#">Edit</a>   <a href="#">Delete</a>   ...	owner	Salesforce	<input checked="" type="checkbox"/>

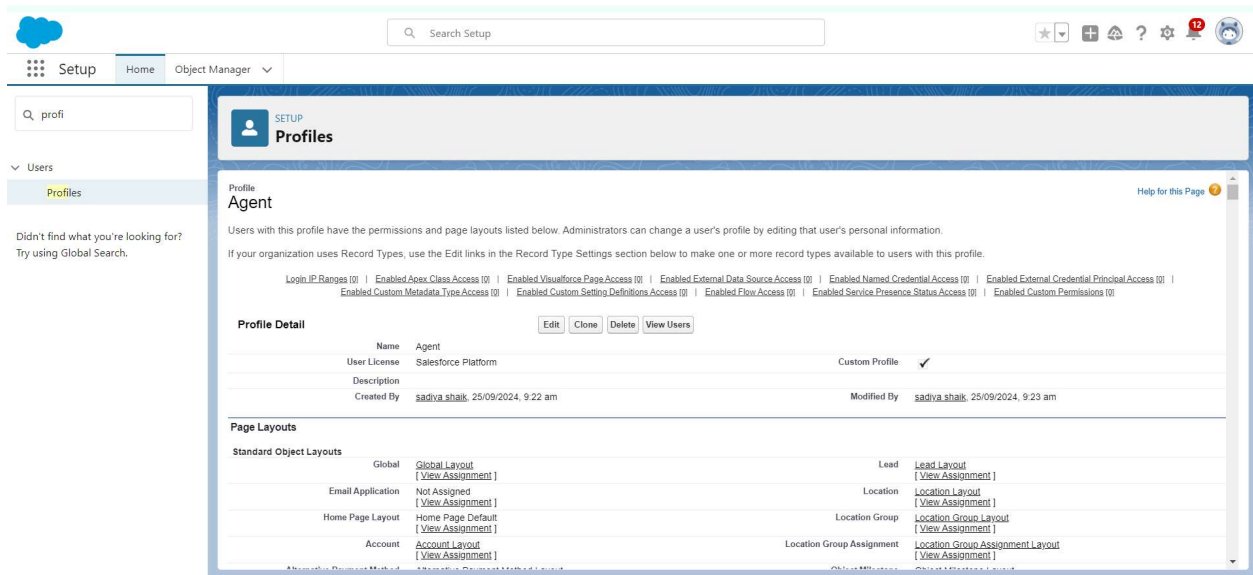


The screenshot shows the "Profile Detail" page for the "owner" profile. It includes a "Profile Detail" section with fields for Name, User License, Description, Created By, and Modified By. Below this is a "Page Layouts" section with a table showing assignments for Standard Object Layouts, Location Group Assignment, Macro, Object Milestone, and Operating Hours. The table lists the assigned layouts and provides links to view assignments.

Standard Object Layouts	Location Group Assignment	Macro	Object Milestone	Operating Hours
Global: <a href="#">Global Layout</a> [View Assignment]	<a href="#">Location Group Assignment Layout</a> [View Assignment]	<a href="#">Macro Layout</a> [View Assignment]	<a href="#">Object Milestone Layout</a> [View Assignment]	<a href="#">Operating Hours Layout</a> [View Assignment]
Email Application: <a href="#">Not Assigned</a> [View Assignment]				
Home Page Layout: <a href="#">DE Default</a> [View Assignment]				
Account: <a href="#">Account Layout</a> [View Assignment]				

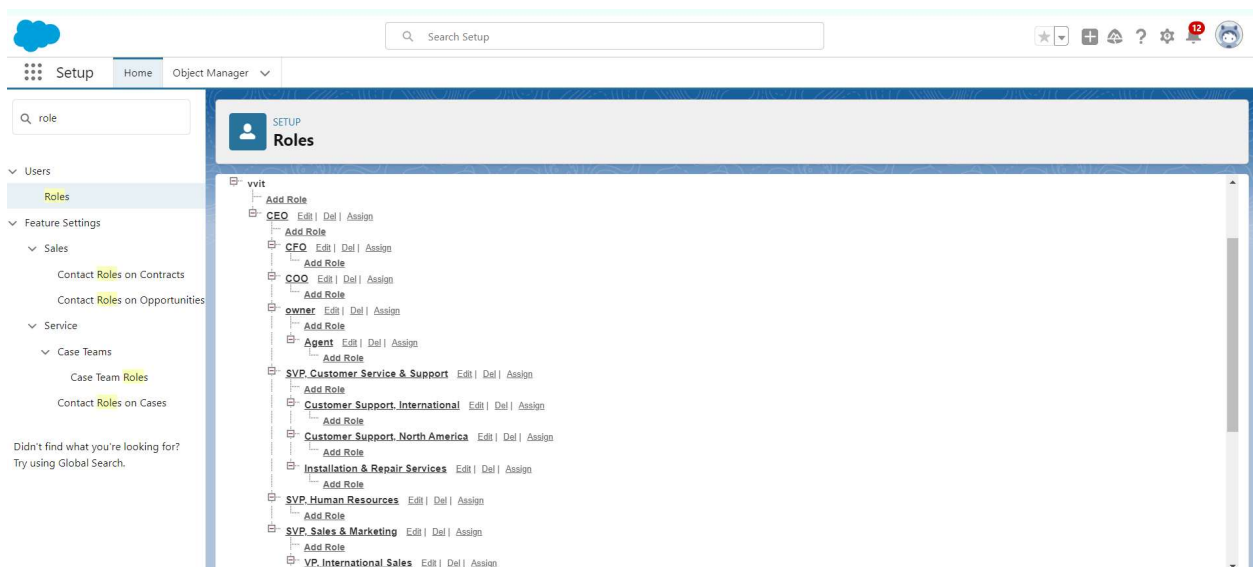
**Agent Profile:** I have created an Agent profile shown in the figure below.

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The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The left sidebar contains a search bar with 'profi' and a navigation menu with 'Users' and 'Profiles'. The main content area is titled 'Agent' and includes a description: 'Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information. If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.' Below this, there are links for various settings like 'Login IP Ranges', 'Enabled Apex Class Access', etc. The 'Profile Detail' section shows fields for Name (Agent), User License (Salesforce Platform), Custom Profile (checked), Description (Not Assigned), Created By (sadiya.shah), and Modified By (sadiya.shah). The 'Page Layouts' section lists Standard Object Layouts for Global, Email Application, Home Page Layout, and Account, each with a 'View Assignment' link. It also lists layouts for Lead, Location, Location Group, and Location Group Assignment.

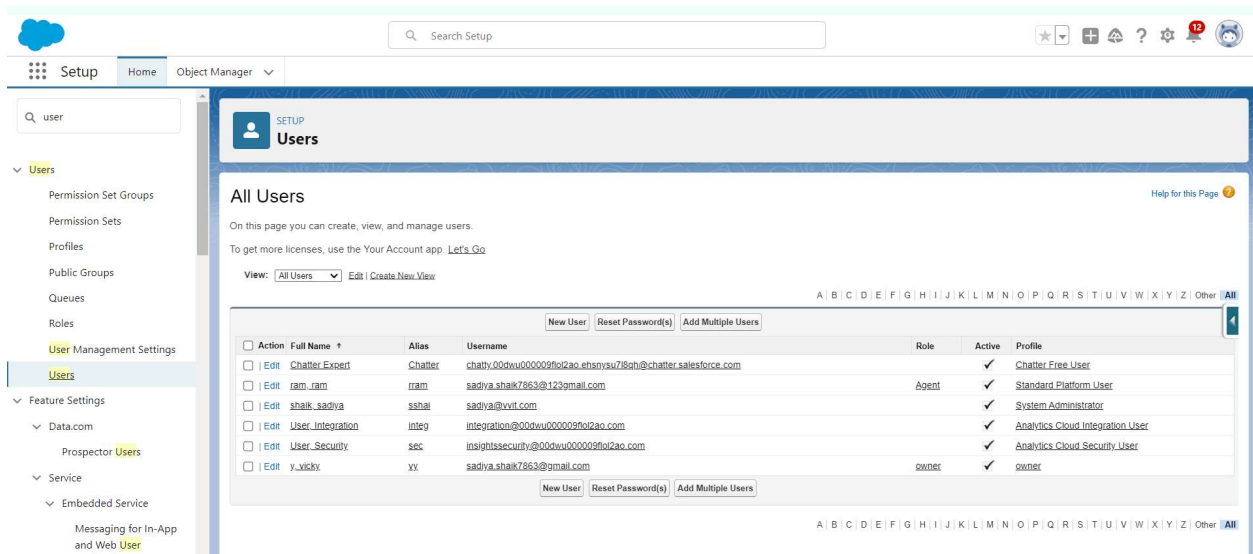
**Roles and Hierarchy:** I have created an owner role under that Agent role shown in below figure.



The screenshot shows the Salesforce Setup interface for the 'Roles' section. The left sidebar contains a search bar with 'role' and a navigation menu with 'Users', 'Roles', and 'Feature Settings'. The main content area displays a role hierarchy tree. The hierarchy starts with 'vvit' at the top, followed by 'CEO', 'CFO', 'COO', 'owner', 'Agent', 'SVP, Customer Service & Support', 'Customer Support, International', 'Customer Support, North America', 'Installation & Repair Services', 'SVP, Human Resources', 'SVP, Sales & Marketing', and 'VP, International Sales'. Each role has an 'Add Role' link and an 'Assign' link. The 'owner' role is highlighted, indicating it is the role created under the 'Agent' role.

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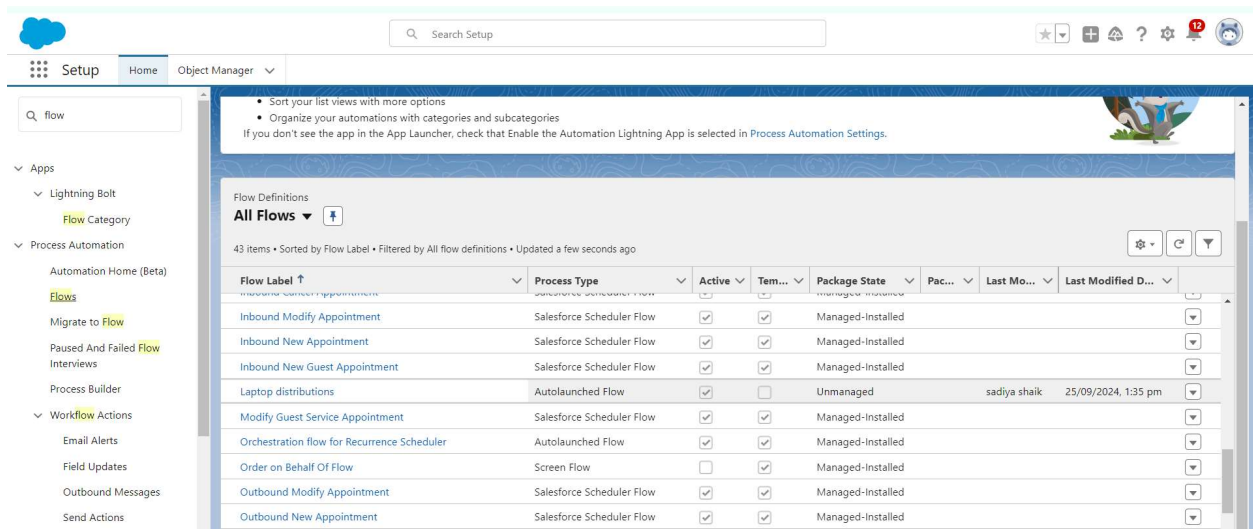
**User:** I have created two users vicky y and ram ram which is shown in below figure.



The screenshot shows the Salesforce Setup interface for the 'Users' section. The left sidebar contains navigation options like 'Users', 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', and 'User Management Settings'. The main content area is titled 'All Users' and includes a search bar, a 'View' dropdown set to 'All Users', and a table of users. The table has columns for Action, Full Name, Alias, Username, Role, Active, and Profile. Two users are highlighted: 'vicky y' (owner) and 'ram ram' (Agent).

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatter.00duwu000009foi2ao.ehsnvsu78oh@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	ram ram	ram	sadiya.shaik7863@123gmail.com	Agent	✓	Standard Platform User
<input type="checkbox"/> Edit	shaik_sadiya	sshal	sadiya@yvit.com		✓	System Administrator
<input type="checkbox"/> Edit	User Integration	integ	integration@00duwu000009foi2ao.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightssecurity@00duwu000009foi2ao.com		✓	Analytics Cloud Security User
<input type="checkbox"/> Edit	y_vicky	yy	sadiya.shaik7863@gmail.com	owner	✓	owner

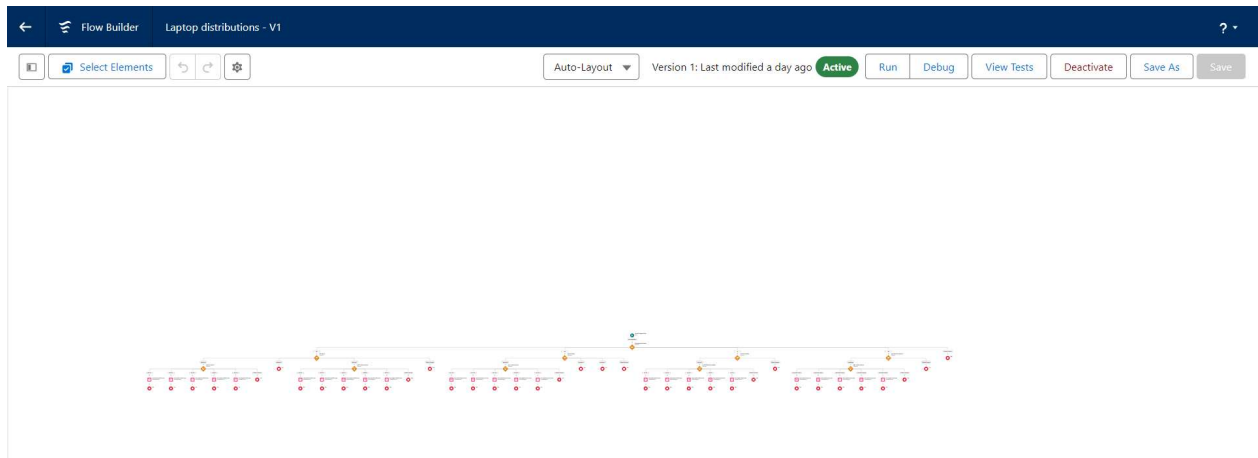
**Flows:** In Laptop Rentals app I have created flows using decisions acer, hp, dell, mac and sub decisions shown in below figure.



The screenshot shows the Salesforce Setup interface for the 'Flows' section. The left sidebar contains navigation options like 'Apps', 'Lightning Bolt', 'Flow Category', 'Process Automation', 'Automation Home (Beta)', 'Flows', 'Migrate to Flow', 'Paused And Failed Flow Interviews', 'Process Builder', 'Workflow Actions', 'Email Alerts', 'Field Updates', 'Outbound Messages', and 'Send Actions'. The main content area is titled 'All Flows' and includes a search bar, a 'Flow Label' dropdown, and a table of flow definitions. The table has columns for Flow Label, Process Type, Active, Tem..., Package State, Pac..., Last Mo..., and Last Modified D....

Flow Label	Process Type	Active	Tem...	Package State	Pac...	Last Mo...	Last Modified D...
Inbound Modify Appointment	Salesforce Scheduler Flow	✓	✓	Managed-Installed			
Inbound New Appointment	Salesforce Scheduler Flow	✓	✓	Managed-Installed			
Inbound New Guest Appointment	Salesforce Scheduler Flow	✓	✓	Managed-Installed			
Laptop distributions	Autolaunched Flow	✓		Unmanaged		sadiya shaik	25/09/2024, 1:35 pm
Modify Guest Service Appointment	Salesforce Scheduler Flow	✓	✓	Managed-Installed			
Orchestration flow for Recurrence Scheduler	Autolaunched Flow	✓	✓	Managed-Installed			
Order on Behalf Of Flow	Screen Flow		✓	Managed-Installed			
Outbound Modify Appointment	Salesforce Scheduler Flow	✓	✓	Managed-Installed			
Outbound New Appointment	Salesforce Scheduler Flow	✓	✓	Managed-Installed			

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**APEX:** I have created a class with name LaptopBookingHandler and a trigger with name LaptopBooking below is the code for it.

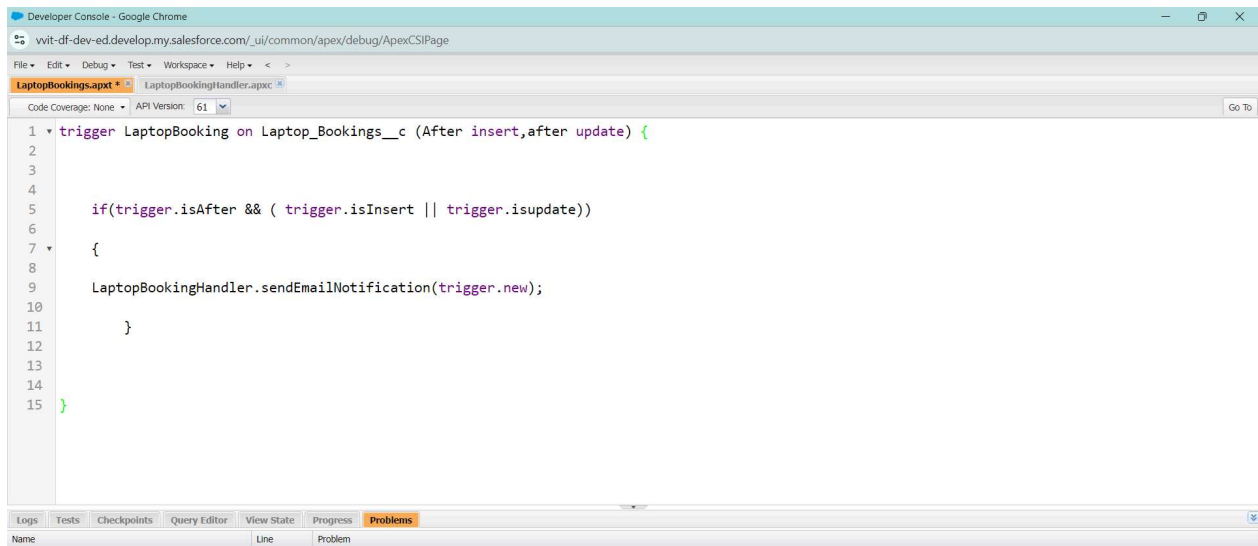
```
Developer Console - Google Chrome
vwt-df-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage

File Edit Debug Test Workspace Help < >
LaptopBookings.apex LaptopBookingHandler.apex
Code Coverage: None API Version: 61 Go To

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.Laptop_type__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 journey with us, while we
18
19             email.setPlainTextBody(body);
20
21     }
22 }
```

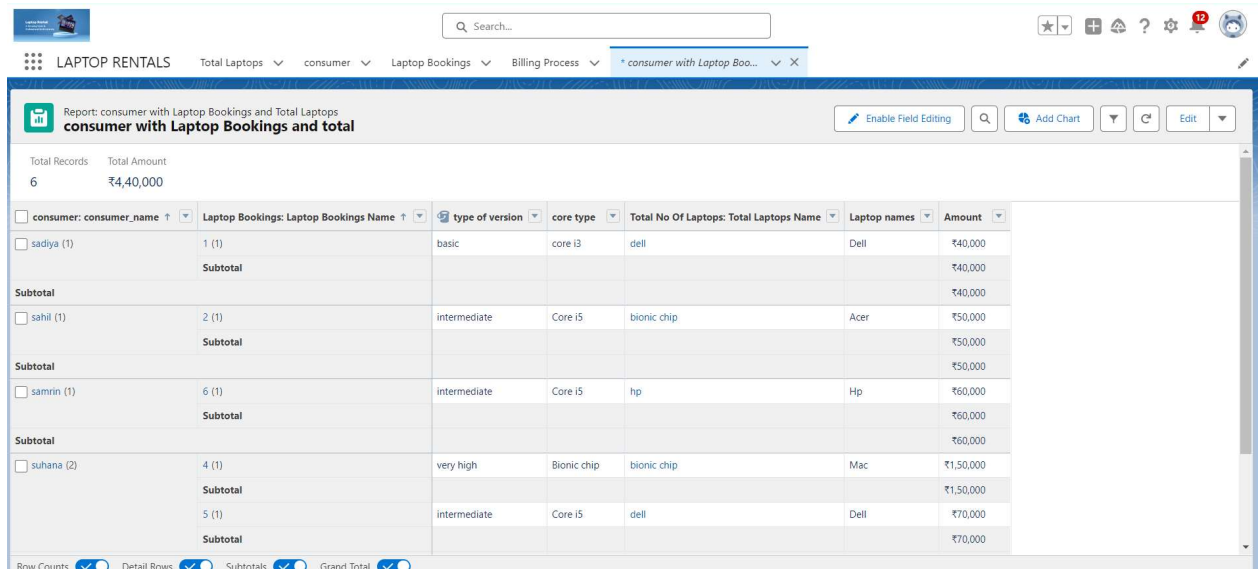
Name	Line	Problem
------	------	---------

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```
1 trigger LaptopBooking on Laptop_Bookings__c (After insert,after update) {
2
3
4
5     if(trigger.isAfter && ( trigger.isInsert || trigger.isupdate))
6
7
8     {
9         LaptopBookingHandler.sendEmailNotification(trigger.new);
10
11     }
12
13
14
15 }
```

**Report:** Finally after launching the app,we can see the reports like consumer,laptop booking,core type,Total no of Laptops,Laptop names,Amount and in top left corner we can see Total Records and Total Amount.



Report: consumer with Laptop Bookings and Total Laptops  
**consumer with Laptop Bookings and total**

Total Records: 6  
Total Amount: ₹4,40,000

consumer: consumer_name	Laptop Bookings: Laptop Bookings Name	type of version	core type	Total No Of Laptops: Total Laptops Name	Laptop names	Amount
<input type="checkbox"/> sadiya (1)	1 (1)	basic	core i3	dell	Dell	₹40,000
	Subtotal					₹40,000
	Subtotal					₹40,000
<input type="checkbox"/> sahil (1)	2 (1)	intermediate	Core i5	bionic chip	Acer	₹50,000
	Subtotal					₹50,000
	Subtotal					₹50,000
<input type="checkbox"/> samrin (1)	6 (1)	intermediate	Core i5	hp	Hp	₹60,000
	Subtotal					₹60,000
	Subtotal					₹60,000
<input type="checkbox"/> suhana (2)	4 (1)	very high	Bionic chip	bionic chip	Mac	₹1,50,000
	Subtotal					₹1,50,000
	5 (1)	intermediate	Core i5	dell	Dell	₹70,000
	Subtotal					₹70,000

Row Counts: ☒ Detail Rows: ☒ Subtotals: ☒ Grand Total: ☒

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**Dashboards:** The total amount and type of versions are represented in pie chart used for visualization.

