

**Project Title:**

**CRM APPLICATION FOR LAPTOP RENTALS**

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# LAPTOP RENTALS

Laptop rentals are a convenient option for individuals or businesses that need a laptop for a short period, don't want to commit to buying one, or require a specific type of laptop for a particular task. In India, you can find laptop rental services through various companies that cater to events, conferences, training sessions, or personal needs. These services often provide a range of laptops with different specifications to suit various requirements. Rentals can be for a few days, weeks, or months, offering flexibility based on your needs. Some rental services might also offer additional accessories like chargers, mice, or bags along with the laptop.

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.

A well-designed Salesforce CRM for laptop rentals typically includes the following features:

- **Centralized Customer Data:** Maintain comprehensive records of customer interactions, rental histories, and preferences to personalize services.
- **Automated Rental Processes:** Utilize workflows to handle rental requests, approvals, and notifications, reducing manual efforts.
- **Inventory Management:** Track laptop availability, maintenance schedules, and returns to ensure optimal utilization.

- **Billing and Payments:** Integrate billing systems to manage invoices, payments, and financial reporting seamlessly.
- **Analytics and Reporting:** Generate insights on rental trends, customer behavior, and operational efficiency to inform decision-making.

### **Implementing a Laptop Rental CRM in Salesforce**

To build a CRM tailored for laptop rentals in Salesforce, consider the following steps:

**Define Business Requirements:** Identify the specific needs of your rental operations, such as tracking rental durations, managing customer communications, and handling payments.

1. **Customize Salesforce Objects:** Create custom objects and fields to represent laptops, rental agreements, and customer profiles.
2. **Automate Workflows:** Set up automation for sending reminders, processing renewals, and updating inventory statuses.
3. **Integrate Payment Systems:** Connect with payment gateways to facilitate smooth financial transactions.
4. **Develop Reports and Dashboards:** Design visual representations of key metrics to monitor performance and identify areas for improvement.

### **Additional Resources**

- **Native Rent App:** Explore the Native Rent application on Salesforce AppExchange, which offers features like automated maintenance alerts, contract renewals, and integration with accounting systems.
- **Point of Rental Integration:** Learn about Point of Rental's integration with Salesforce, enhancing data synchronization and operational efficiency.

- **Salesforce Starter Suite:** For small businesses, Salesforce offers the Starter Suite, an all-in-one CRM solution that includes sales, service, and marketing tools.

### **Highlight the key features and business needs for the CRM**

**Customer Data Management:** Centralized storage of customer information, interactions, and history.

**2. Sales Management:** Tools for managing leads, opportunities, sales pipelines, and forecasting.

**3. Marketing Automation:** Features to automate marketing campaigns, track responses, and measure effectiveness.

**4. Customer Service & Support:** Tools for managing customer inquiries, issues, and support tickets.

**5. Analytics & Reporting:** Insights into customer behavior, sales performance, and marketing effectiveness.

**6. Integration Capabilities:** Ability to integrate with other business tools like email, ERP, or e-commerce platforms.

### **Business Needs for a CRM:**

**1. Improve Customer Relationships:** Enhance interactions and personalize experiences based on customer data.

**2. Boost Sales Efficiency:** Streamline sales processes, track leads, and forecast sales more accurately.

**3. Enhance Customer Service:** Provide better support through organized customer interaction history.

**4. Make Data-Driven Decisions:** Use analytics to understand customer trends and optimize strategies.

**5. Increase Operational Efficiency:** Automate tasks where possible to save time and reduce manual errors.

Understanding Business Requirements for CRM in Laptop Rentals:

- User Needs: Manage customer interactions, track laptop rentals, handle customer service for rentals, and analyze rental trends.
- Problems Being Solved: Improve customer relationship management, streamline rental processes, enhance customer service for laptop rentals.

Defining Project Scope and Objectives for CRM in Laptop Rentals:

1. Scope:

- Manage customer data related to laptop rentals.
- Track rental history, preferences, and interactions.
- Automate follow-ups for rental due dates or customer feedback.
- Provide insights into rental trends and customer behavior.

2. Objectives:

- Enhance customer satisfaction through better service.
- Optimize rental management through data-driven decisions.
- Improve operational efficiency in managing rentals.

Design Data Model for CRM Laptop Rentals:

1. Entities:

- Customer: ID, name, contact details, rental history.

- Laptop: ID, specs, rental status.
- Rental: ID, customer ID, laptop ID, rental dates, status.

## 2. Relationships:

- Customers have multiple rentals.
- Rentals are associated with one laptop and one customer.

## Design Security Model for CRM Laptop Rentals:

### 1. Access Control:

- Admins manage overall CRM data.
- Staff have access to customer and rental data for operational needs.

### 2. Data Protection:

- Customer data is secured with encryption.
- Access logs are maintained for audit purposes.

## **Project Overview**


The *Laptop Rentals* project aims to provide affordable, flexible, and efficient laptop rental services to individuals, startups, educational institutions, and businesses. The service includes short-term and long-term rentals with delivery, maintenance, and support options.

## **Salesforce Developer Account Creation:**

- To setup for a salesforce account.
- To login to your salesforce account.

- Account activation.

login.salesforce.com/?locale=in



Username


Password

Log In

☒ Remember me

Forgot Your Password? [Use Custom Domain](#)

or

 Log In with Email

orgfarm-ddcb13ca81-dev-ed.develop.lightning.force.com/lightning/setup/SetupOneHome/home

Search Setup

Setup Home Object Manager

Quick Find

Setup Home

- Salesforce Go
- Service Setup Assistant
- Commerce Setup Assistant
- Field Service Setup Home (Beta)
- Hyperforce Assistant
- Release Updates
- Salesforce Mobile App
- Lightning Usage
- Optimizer
- Sales Cloud Everywhere

ADMINISTRATION

- > Users
- > Data
- > Email

PLATFORM TOOLS

- > Subscription Management

SETUP Home

**Data Cloud**

Connect, prepare, harmonize, unify, and analyze data to get a 360-degree view of your customers.

Watch Video [Let's Go](#)

**Get Started with Einstein Bots**

Launch an AI-powered bot to automate your digital connections.

[Get Started](#)

**Try the New Field Service Setup**

Discover how Field Service can help you deliver customer-centric service, drive revenue, and cut costs. Get started in less time with the new Field Service Setup Home today.

**Support customers in the field**

Reduce your customer base in the field in less time. With Field Service, you get the tools you need to manage work orders, scheduling, and your mobile workforce.

[Get Started with Field Service](#)

[Watch the Video](#)

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[Let's Go](#)

**Most Recently Used**

10 Items

NAME	TYPE
Email	Custom Field Definition
LaptopBookingHandler	Apex Class
LaptopBooking	Apex Trigger

## Object Creation:-

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.

To Navigate to Setup page:

Click on gear icon >> click setup.

From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.

On Custom object defining page:

Enter the label name, plural label name, click on Allow reports, Allow search.

Click on Save.

The screenshot shows the Salesforce Object Manager interface for a custom object named 'Laptop Bookings'. The page is titled 'Fields & Relationships' and displays a list of 12 fields. The fields are sorted by Field Label. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: Amount (Currency), Core Type (Picklist), Created By (Lookup), Email (Email), how many months (Picklist), Laptop Bookings Name (Text), Laptop Names (Picklist), Laptops Available (Formula), and Last Modified By (Lookup). The 'Laptop Bookings Name' field is highlighted in blue, indicating it is the primary key. The 'Laptop Names' field is also highlighted in blue, indicating it is a lookup field. The 'Laptops Available' field is highlighted in blue, indicating it is a formula field. The 'Last Modified By' field is highlighted in blue, indicating it is a lookup field.

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)		
Email	Email__c	Email		
how many months	how_many_months__c	Picklist		
Laptop Bookings Name	Name	Text(80)		✓
Laptop Names	Laptop_Names__c	Picklist		
Laptops Available	Laptops_Available__c	Formula (Number)		
Last Modified By	LastModifiedById	Lookup(User)		



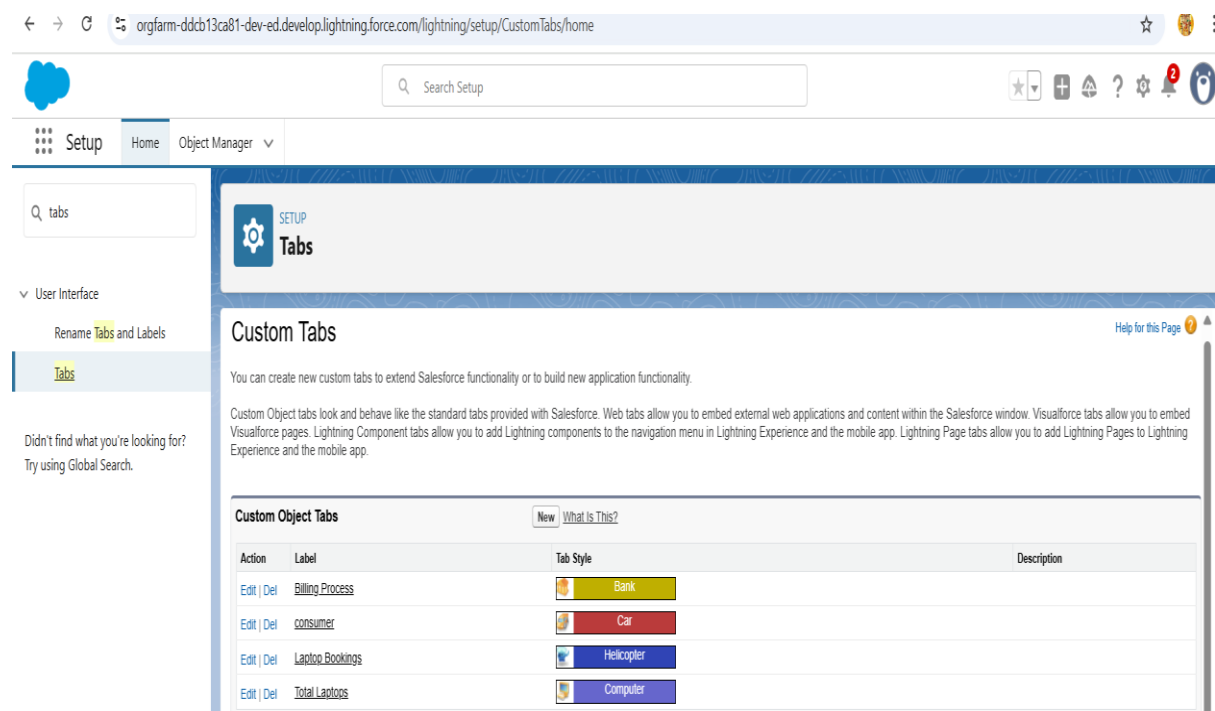
## TABS:

### Types of Tabs:

#### 1. 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.

2. 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.



#### 1. 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.

#### 2. Lightning Component Tabs

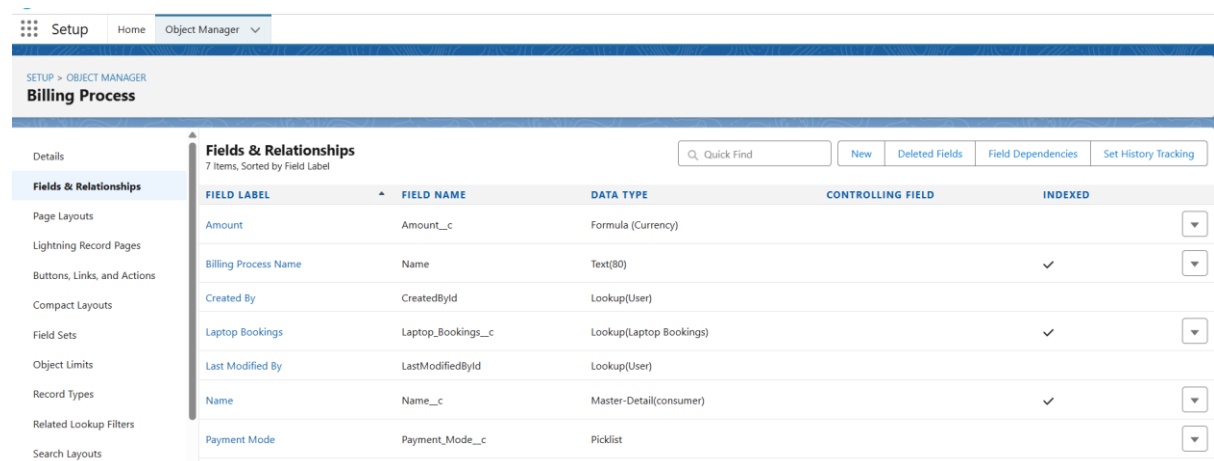
Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app.

### 3. 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.

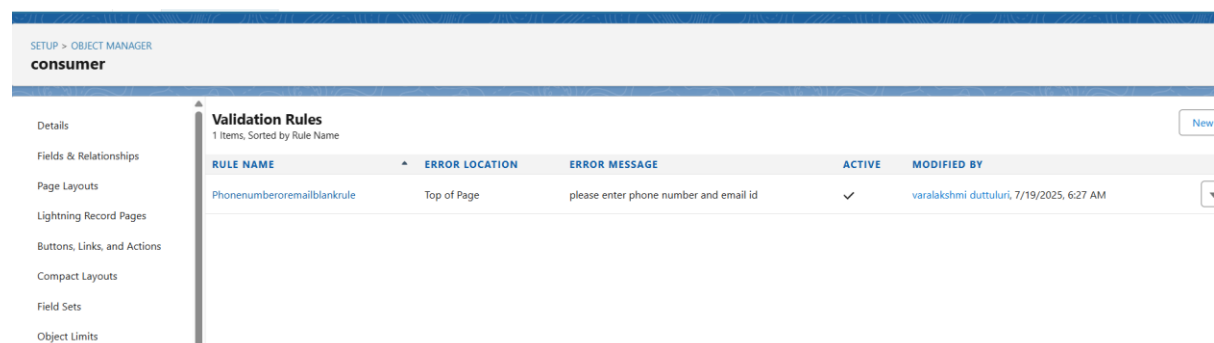
## FIELDS:



The screenshot shows the 'Billing Process' page in the Salesforce Setup interface. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Fields & Relationships' and shows a list of 7 fields. The fields are sorted by Field Label. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: Amount (Amount\_\_c, Formula (Currency)), Billing Process Name (Name, Text(80)), Created By (CreatedById, Lookup(User)), Laptop Bookings (Laptop\_Bookings\_\_c, Lookup(Laptop Bookings)), Last Modified By (LastModifiedById, Lookup(User)), Name (Name\_\_c, Master-Detail(consumer)), and Payment Mode (Payment\_Mode\_\_c, Picklist).

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

## VALIDATION RULES:

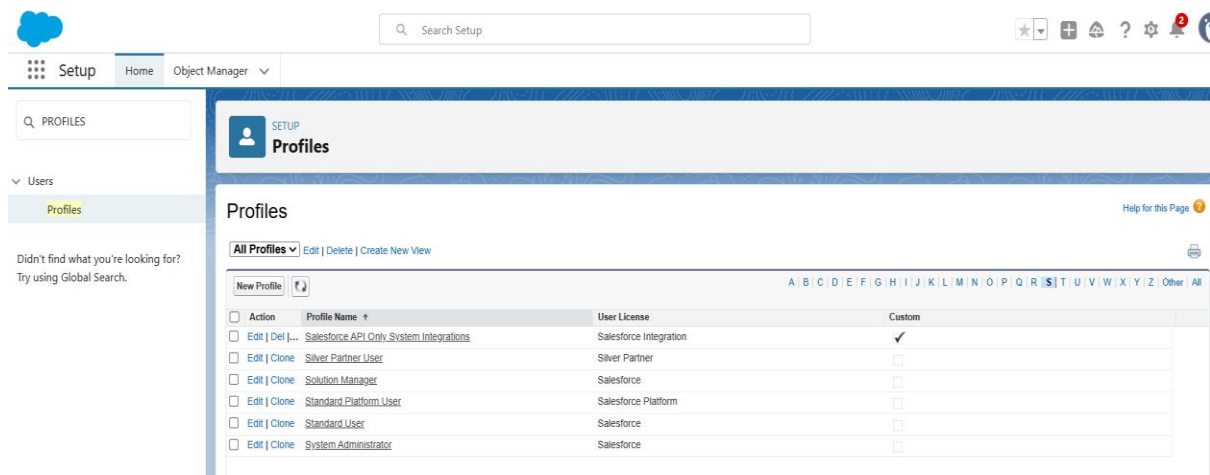


The screenshot shows the 'consumer' page in the Salesforce Setup interface. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, and Object Limits. The main content area is titled 'Validation Rules' and shows a list of 1 item. The table has columns for RULE NAME, ERROR LOCATION, ERROR MESSAGE, ACTIVE, and MODIFIED BY. The rule listed is: Phonenumberoremailblankrule (Top of Page, please enter phone number and email id, Active, Modified By: varalakshmi.duttuluri, 7/19/2025, 6:27 AM).

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Phonenumberoremailblankrule	Top of Page	please enter phone number and email id	✓	varalakshmi.duttuluri, 7/19/2025, 6:27 AM

## FIELDS:

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.



## Types of profiles in salesforce

### 1. Standard profiles:

By default salesforce provides below standard profiles.

- Contract Manager
- Read Only
- Marketing User
- Solutions Manager
- Standard User
- System Administrator.

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.

## USERS:

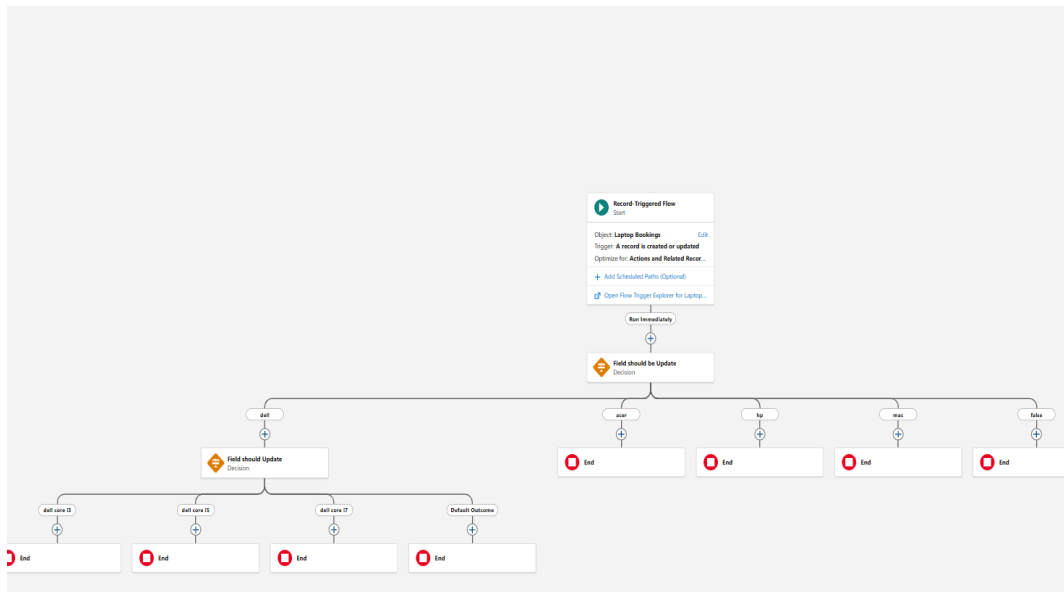
A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access.

The screenshot shows the Salesforce Setup interface for the 'Users' section. The left sidebar contains a navigation menu with options like 'Users', 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', 'Feature Settings', 'Data.com', and 'Prospector'. 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. Below the table are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatter_009g000006bhzuaa.rse2p0z0p6fm@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	Varalakshmi	var	varalakshmi@009g000006bhzuaa.rse2p0z0p6fm@agentforce.com		✓	System Administrator
<input type="checkbox"/> Edit	EPIC_OrgFarm	OEPIJC	epic.8927680c1a6@orgfarm.salesforce.com		✓	System Administrator
<input type="checkbox"/> Edit	Ramesh Ram	rname	varalakshmi@009g000006bhzuaa.rse2p0z0p6fm@gmail.com	Agent	✓	Standard Platform User
<input type="checkbox"/> Edit	User Integration	integ	integration@009g000006bhzuaa.rse2p0z0p6fm@gmail.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightssecurity@009g000006bhzuaa.rse2p0z0p6fm@gmail.com		✓	Analytics Cloud Security User
<input type="checkbox"/> Edit	Y. Vicky	yrush	varalakshmi@009g000006bhzuaa.rse2p0z0p6fm@gmail.com	owner	✓	Standard 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 coding knowledge. 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, and interact 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 collect or 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 a record is created or updated. They don't require user interaction and can be used for background automation.

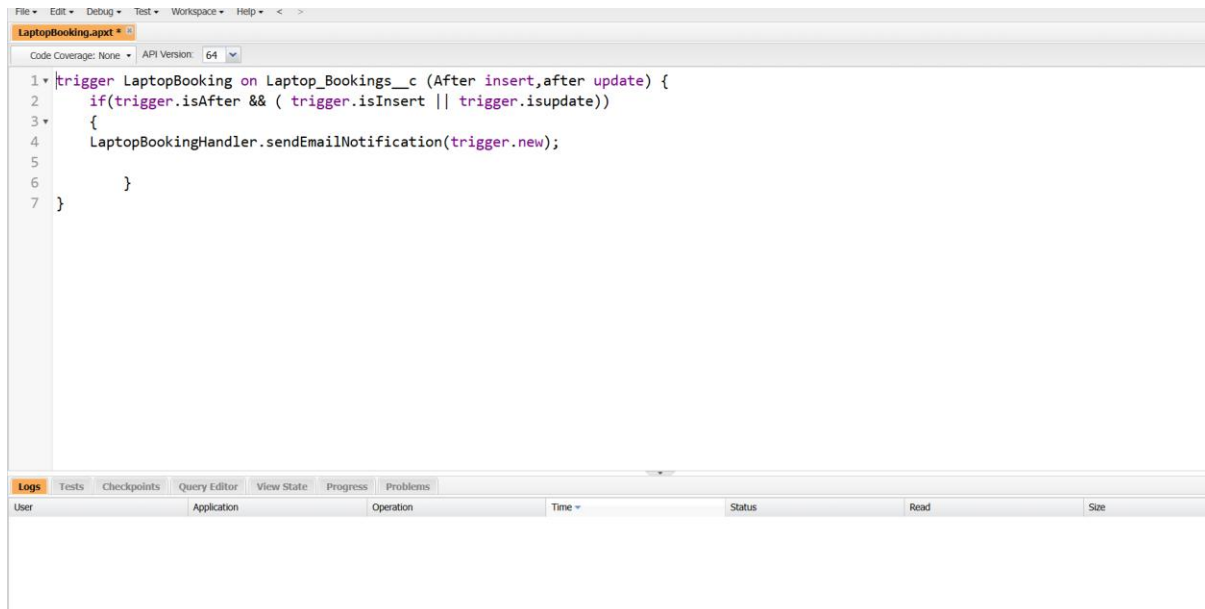
## TRIGGERS:

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.

It is as similar as java i.e, it also supports OOP( Object oriented programming) like Classes, objects, methods.

## Creating Classes :

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



- 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.

- Object

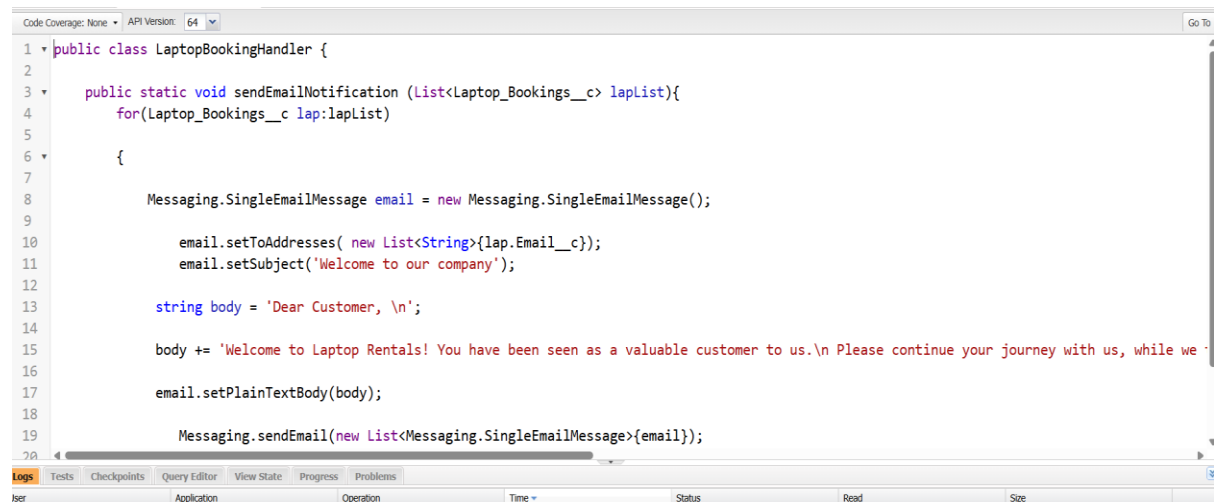
Object is an instance of a class, where it can access all the properties that are present in a class i.e, variables and methods.

Apex allows you to use the private, protected, public, and global access modifiers when defining methods and variables.

While triggers and anonymous blocks can also use these access modifiers, they aren't as useful in smaller portions of Apex. For example, declaring a method as global in an anonymous block doesn't enable you to call it from outside of that code.

Private:

This access modifier is the default, and means that the method or variable is accessible only within the Apex class in which it's defined. If you don't specify an access modifier, the method or variable is private.



```
1 public class LaptopBookingHandler {
2
3     public static void sendEmailNotification (List<Laptop_Bookings__c> lapList){
4         for(Laptop_Bookings__c lap:lapList)
5
6         {
7
8             Messaging.SingleEmailMessage email = new Messaging.SingleEmailMessage();
9
10            email.setToAddresses( new List<String>{lap.Email__c});
11            email.setSubject('Welcome to our company');
12
13            string body = 'Dear Customer, \n';
14
15            body += 'Welcome to Laptop Rentals! You have been seen as a valuable customer to us.\n Please continue your journey with us, while we
16
17            email.setPlainTextBody(body);
18
19            Messaging.sendEmail(new List<Messaging.SingleEmailMessage>{email});
20        }
21    }
```

## 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.

### Key Scenario: Managing the End-to-End Laptop Rental Lifecycle

#### Problem:

The business needs a centralized system to handle:

- Inventory tracking of laptops
- Customer inquiries and bookings
- Rental duration management

- Payments and returns
- Maintenance and service requests
- Generating reports for usage, revenue, and equipment status

## **Salesforce Implementation Addresses the Scenario Through:**

### **1. Object and Data Management**

- Custom **Objects** for:
  - Laptop
  - Rental Agreement
  - Customer
  - Rental Request
  - Service Request
- Fields to track:
  - Serial Number, Model, Condition
  - Rental Start/End Date
  - Status (Available, Rented, Under Maintenance)

### **2. Automation with Flows/Process Builder**

- Auto-assign rental status
- Send reminders before rental end date
- Update inventory status on return

### **3. Service Cloud / Case Management**

- Track service/maintenance issues
- Assign technicians



- Manage repair timelines

#### **4. Reports and Dashboards**

- Monitor:
  - Number of laptops rented vs available
  - Revenue per month
  - Top customers or models in demand
  - Overdue returns or maintenance cases

#### **5. User Roles and Access Control**

- Profiles for:
  - Rental Agents
  - Service Technicians
  - Admins
- Field-level security to restrict sensitive information

#### **Outcome:**

Salesforce implementation ensures:

- Efficient tracking of laptop inventory and rentals
- Better customer experience through timely service and updates
- Increased revenue via data-driven decisions
- Reduced errors and manual work.

## CONCLUSION:

The implementation of Salesforce CRM for the laptop rentals business has significantly streamlined and optimized the entire rental process—from inventory management to customer engagement and service tracking. By leveraging Salesforce's customizable platform, the organization is now equipped to:

- Efficiently manage laptop inventory and availability
- Automate rental workflows, reducing manual effort and errors
- Deliver timely communication and service to customers
- Track rentals, returns, and maintenance through centralized records
- Generate insightful reports to drive business growth and decision-making.