CRM APPLICATION FOR LAPTOP RENTALS REPORT

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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.

1. **Project Overview**

This project focuses on developing a CRM-based application tailored for managing laptop rentals. The objective is to enhance customer experiences, optimize store operations, and improve overall efficiency. By leveraging the power of Customer Relationship Management (CRM), this project aims to streamline rental processes, ensure timely delivery of items, and foster effective communication with potential customers through targeted email campaigns.

2. **Objectives Business Goals:**

- Enhance customer satisfaction by ensuring timely delivery of rental items.
- Streamline rental operations to reduce inefficiencies.
- Improve customer retention and acquisition through personalized communication.

Specific Outcomes:

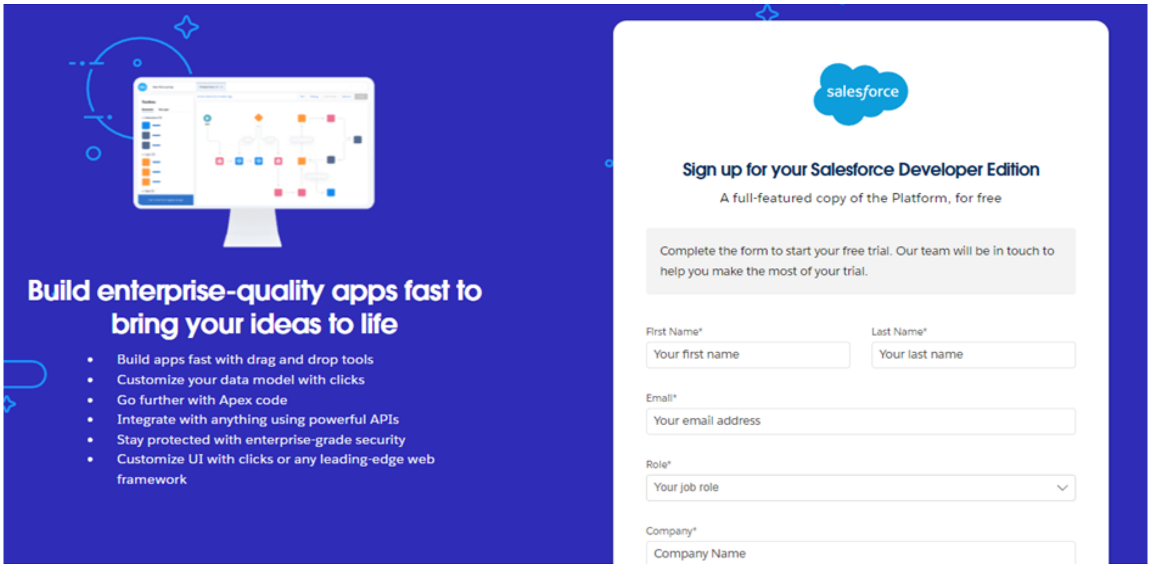
- A functional CRM application that tracks rental inventory, schedules, and customer details. - Implementation of email communication workflows for potential customers.

3. **Salesforce Key Features and Concepts Utilized**

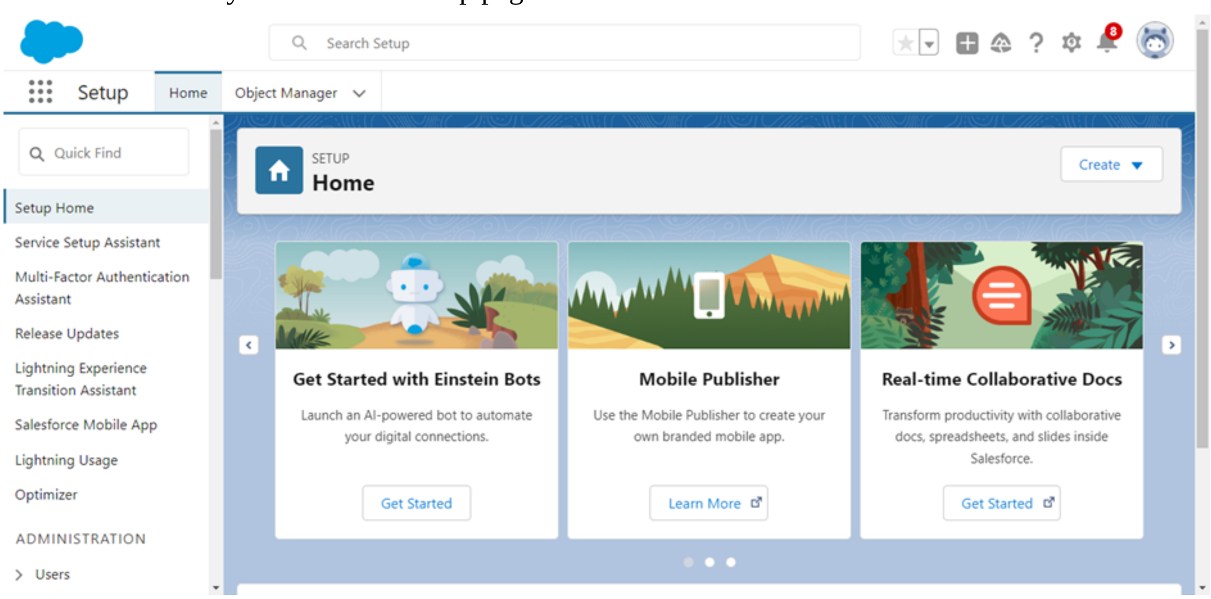
- Lead Management: Identifying and tracking potential customers interested in laptop rentals.
- Workflow Automation: Automated email communication and reminders.
- Custom Objects: For managing rental inventory and tracking orders.
- Reports and Dashboards: Real-time insights into operations and customer engagement metrics

Email Integration: Seamless communication with potential and existing customers. **Detailed Steps to Solution Design**

1. **Creating a developer org in salesforce and Account Activation :**



- Creating a developer org in salesforce.
- To Activate the account, click on the verify account. Give a password and answer a security question and click on change password.
- Give a password and answer a security question and click on change password. Then you will redirect to your salesforce setup page.

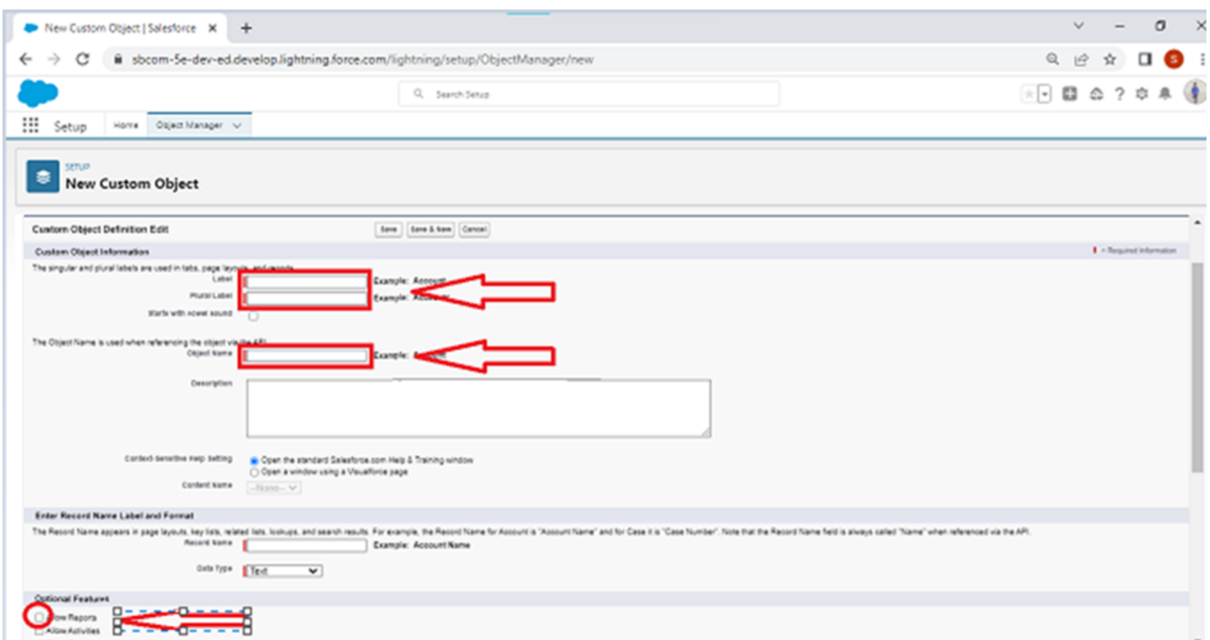


2. Object Creation :

Salesforce objects are of two types:
Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
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.

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

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



2.1 Create Total Laptops Object

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

1) Enter the label name>> Total Laptops

2) Plural label name>> Total Laptops

3) Enter Record Name Label and Format
Record Name >>Total Laptops
Data Type >> Text

1. Click on Allow reports, Allow search and Track Field History,

2. Allow search >> Save.

2.2 Create consumer Object

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

1) Enter the label name >> consumer

2) Plural label name >> consumer

3) Enter Record Name Label and Format

Record Name >> consumer_name

Data Type >> Name

1. Click on Allow reports,Allow search and Track Field History,

2. Allow search >> Save.

2.3 **Create Laptop Bookings Object**

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

1) Enter the label name >> Laptop Bookings

2) Plural label name >> Laptop Bookings

3) Enter Record Name Label and Format

Record Name >> Laptop Bookings

Data Type >> Name

1. Click on Allow reports, Allow search and Track Field History,

2. Allow search >> Save

2.4 **Create Billing Process Object**

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

1) Enter the label name >> Billing Process

2) Plural label name >> Billing Process

3) Enter Record Name Label and Format

Record Name >> Billing Process Name

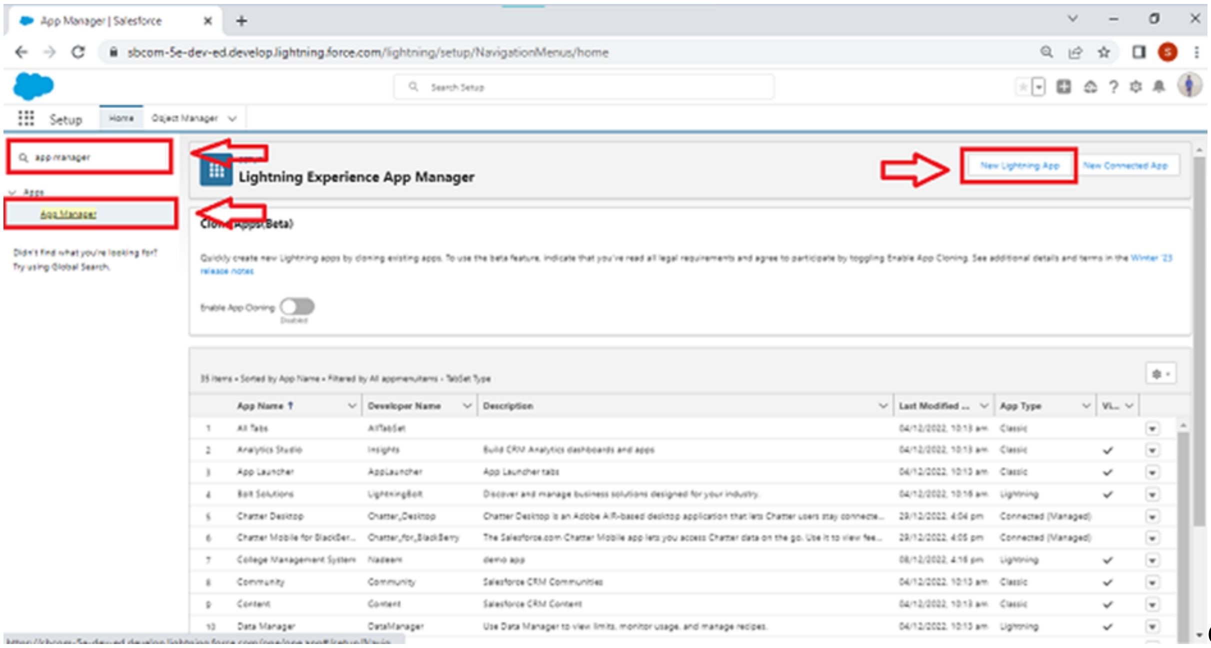
Data Type >> Name

1. Click on Allow reports, Allow search and Track Field History,

2. Allow search >> Save.

3. The Lightning App :

3.1 To create a lightning app page:



Go to setup page >> search “app manager” in quick find >> select “app manager” >> click on New lightning App.

1. 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.
   Upload a photo that is related to your app.

2. 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

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

4 . 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

1. To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(consumer) in search bar >> click on the object.

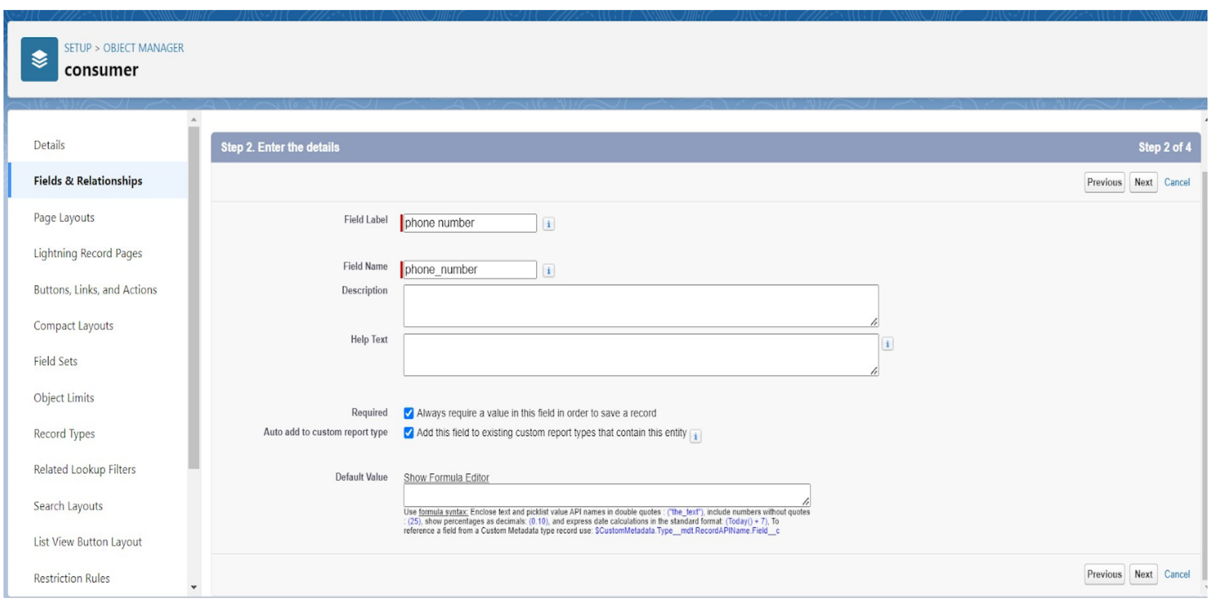
1. Now click on “Fields & Relationships” >> New

2. Select Data Type as a “Phone”

3. Click on next

4. Fill the Above as following:

- Field Label: Phone number
- Field Name : gets auto generated
- Click the required option checkbox.

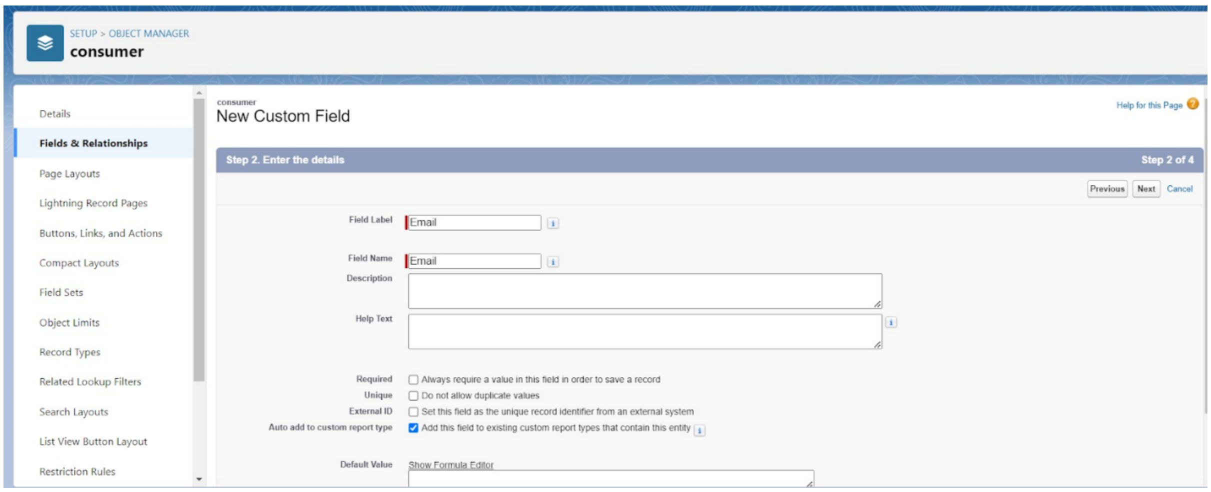


Click on Next >> Next >> Save and new.

2. To create another fields in an object:

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

- Field Label: Email
- Field Name :It’s gets auto generated
- Click on Next >> Next >> Save and new.

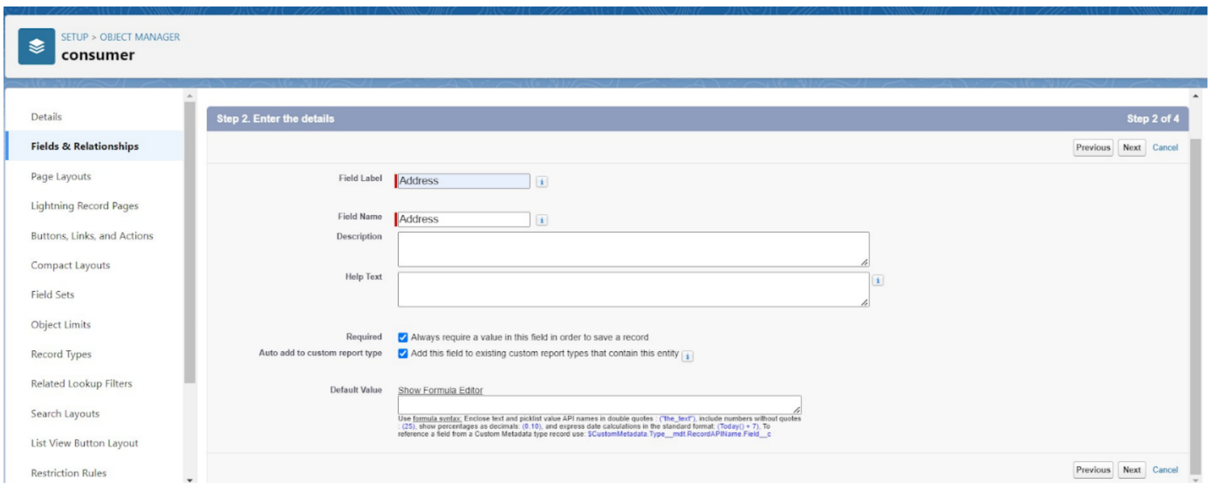


3. To create another fields in an object:

1. Go to setup >> click on Object Manager >> type object name(consumer) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as a “Text Area” and Click on Next
4. Fill the Above as following:

- Field Label: Address
- Field Name : It’s gets auto generated

- Select Required field.
- Click on Next >> Next >> Save and new.

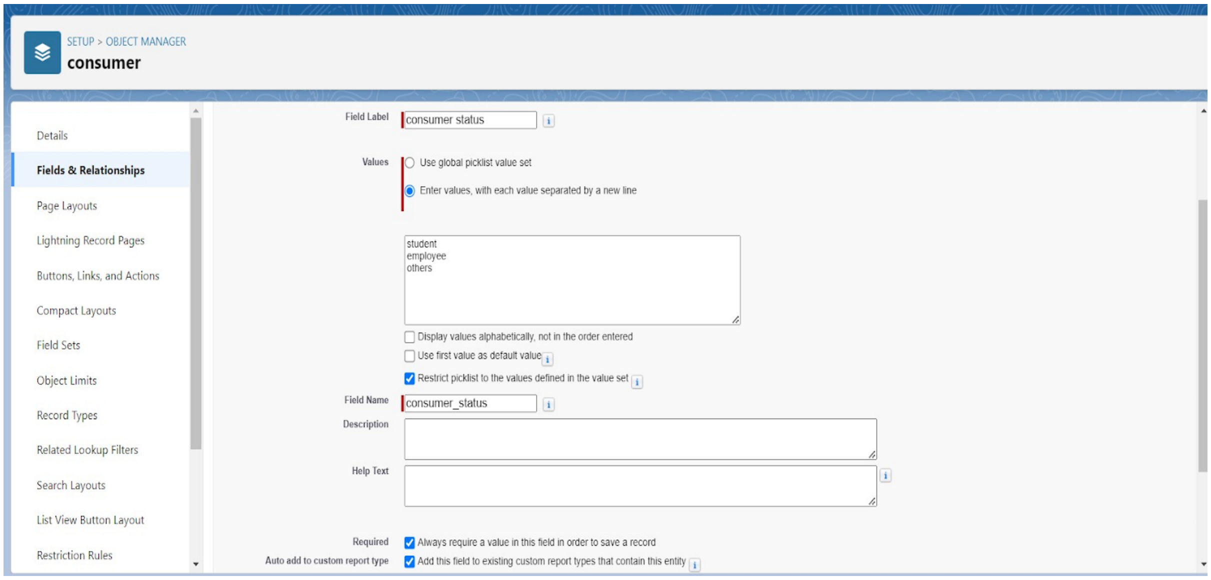


4. To create another fields in an object:

1. Go to setup >> click on Object Manager >> type object name(consumer) in search bar >> click on the object.
2. Now click on "Fields & Relationships" >> New
3. Select Data type as a "Picklist" and Click on Next
4. Fill the Above as following:

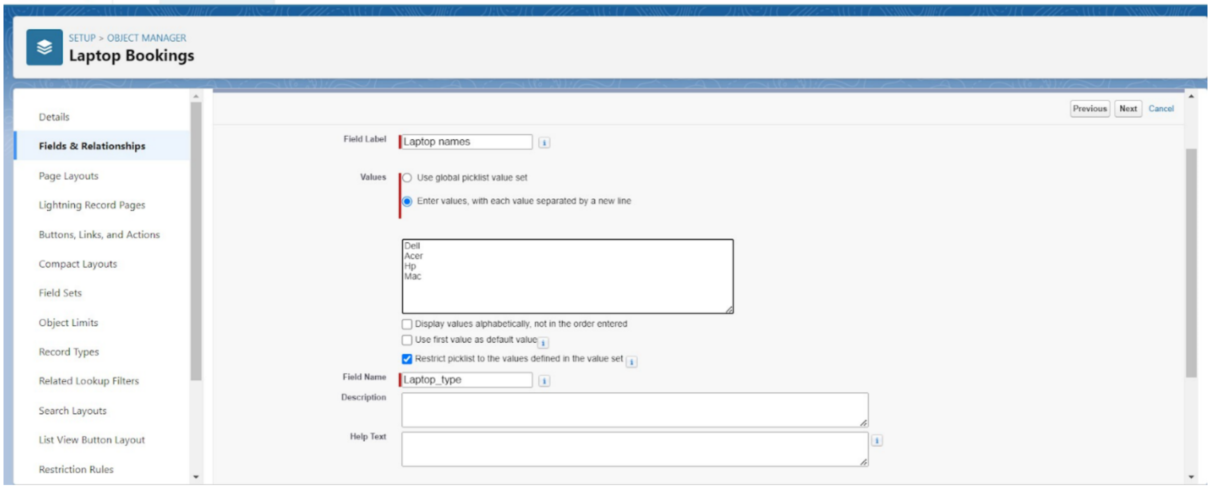
- Field Label: consumer Status
- Value - Select enter values with each value separated by a new line

1. Student
2. Employee
3. Others



5. To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name (Laptop Booking) in the search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data Type as a “Picklist”
4. Label: Laptop Names
5. Picklist values are:-1.Dell 2. Acer 3.Hp 4.Mac



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

   1.Go to setup >> click on Object Manager >> type object name(Laptop Booking) in the search bar >> click on the object.

   2.Now click on "Fields & Relationships" >> New

   3.Select Data Type as a "Picklist" and Label: Core Type

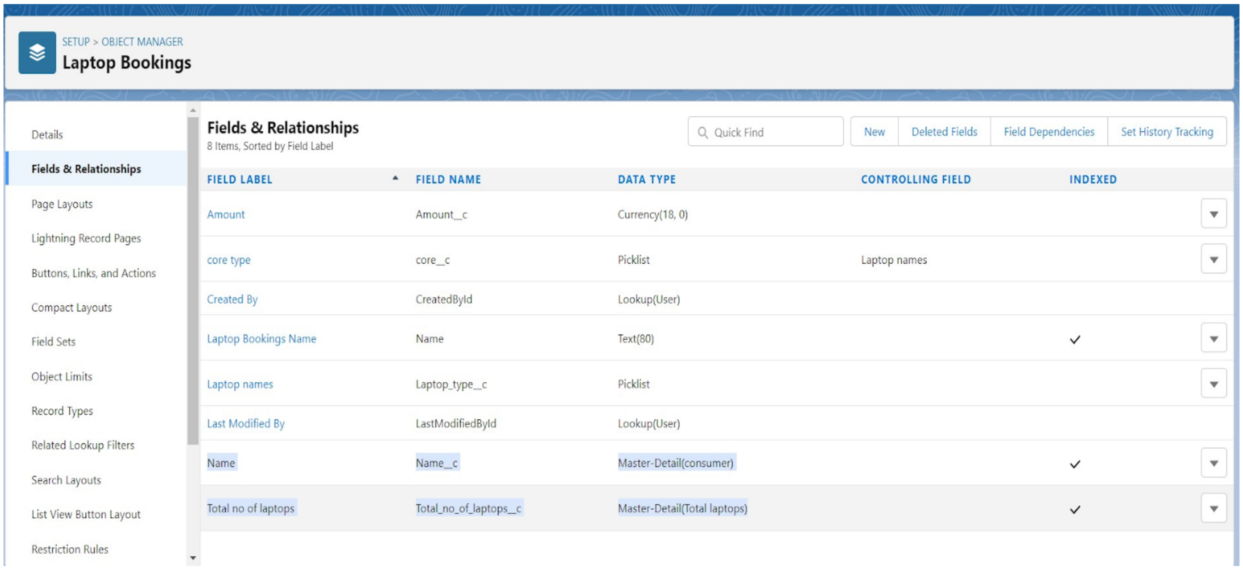
   4.Picklist values are:-1.core i3   2. Core i5   3. Core i7 4.Bionic Chip .

7 . **To Create a Fields & Relationship to an Laptop Booking and Total Laptops Objects**

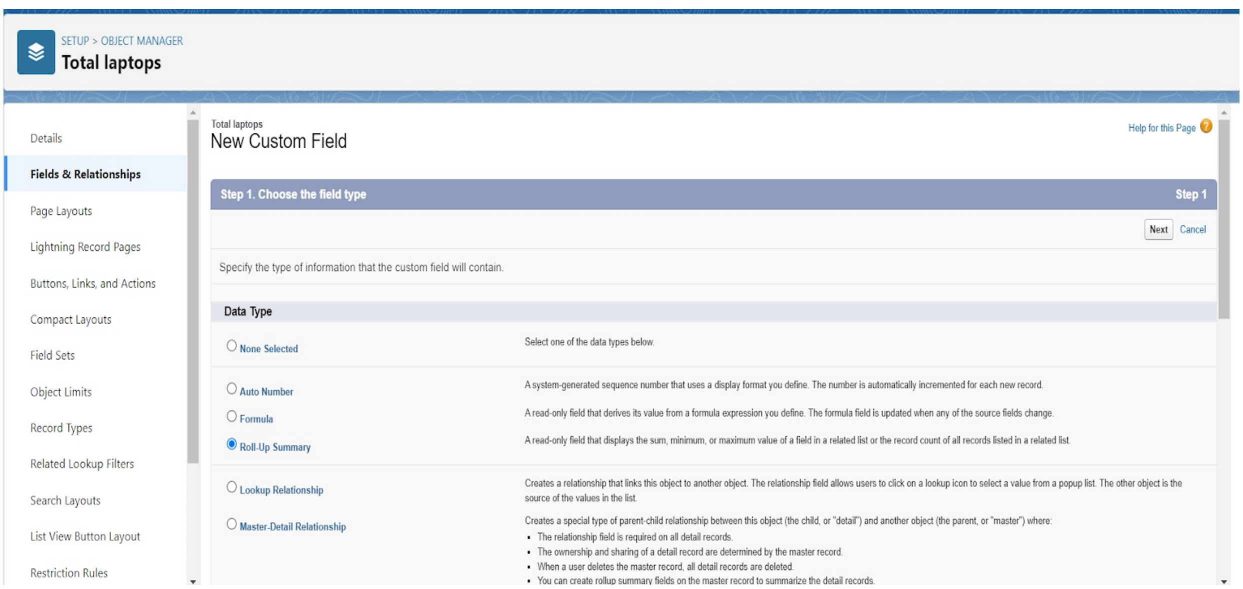
To create fields & relationship to an object:

1. Go to setup >> click on Object Manager >> type object name(Laptop Booking) in the search bar >> click on the object.
2. 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
6. Fill the Above as following:

- Change the Field Label: Consumer
- Field Name :It's gets auto generated



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



1. **Creation of Fields & Relationship for Billing Process Object**

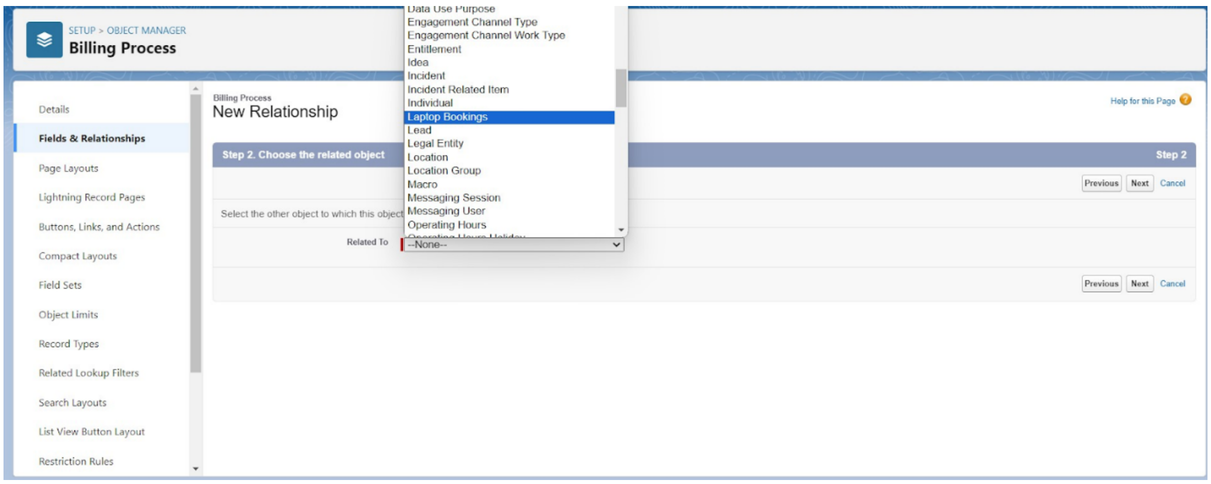
1. Go to setup >> click on Object Manager >> type object name(Billing Process) in the search bar >> click on the object.

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

3. Select Data Type as a “Master-detail Relationship”

4. Click on Next

5. Click on the Related to drop down and Select the consumer object and click on Next



9. Creating the field in Total Laptops object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Total Laptops) in search bar >> click on the object.

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

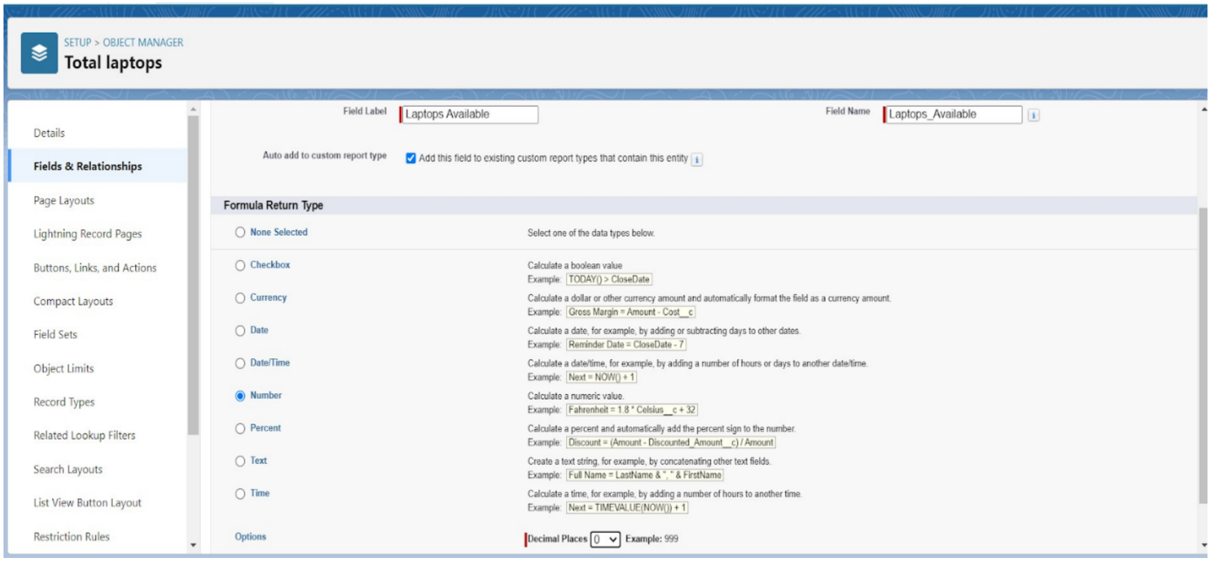
3. Select Data type as a “Formula” and Click on Next

4. Fill the Above as following:

5. Field Label: Laptops Available

6. Field Name : It’s gets auto generated

7. Select the Formula Return Type as “Number”

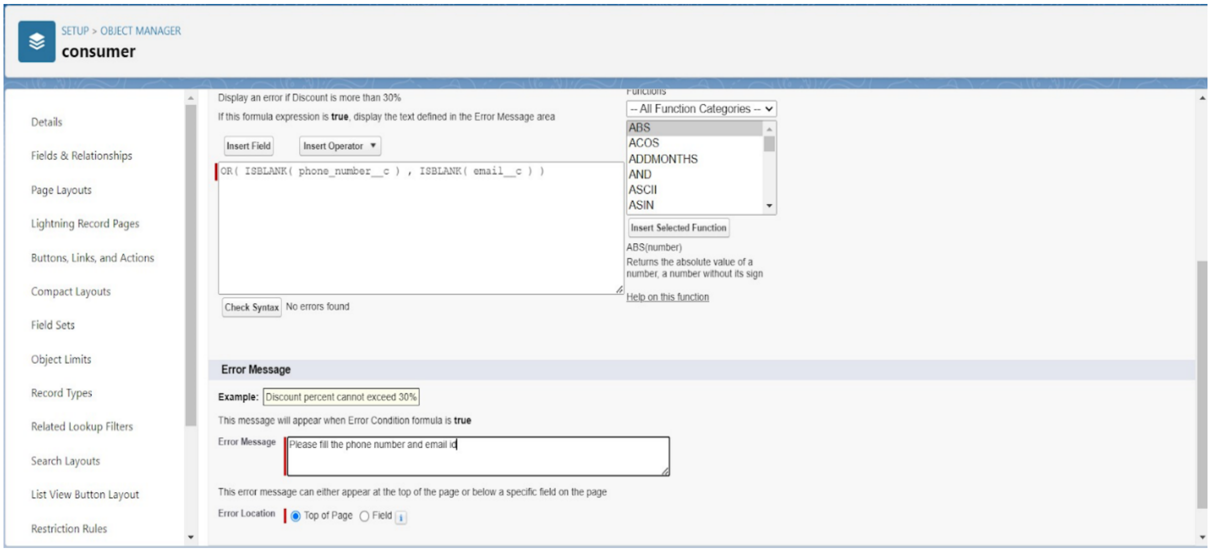


4. Validation Rule

Creating the validation rule for phone number field in consumer object

1. Go to the setup page >> click on object manager >> From drop down click edit for 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 be blank”.

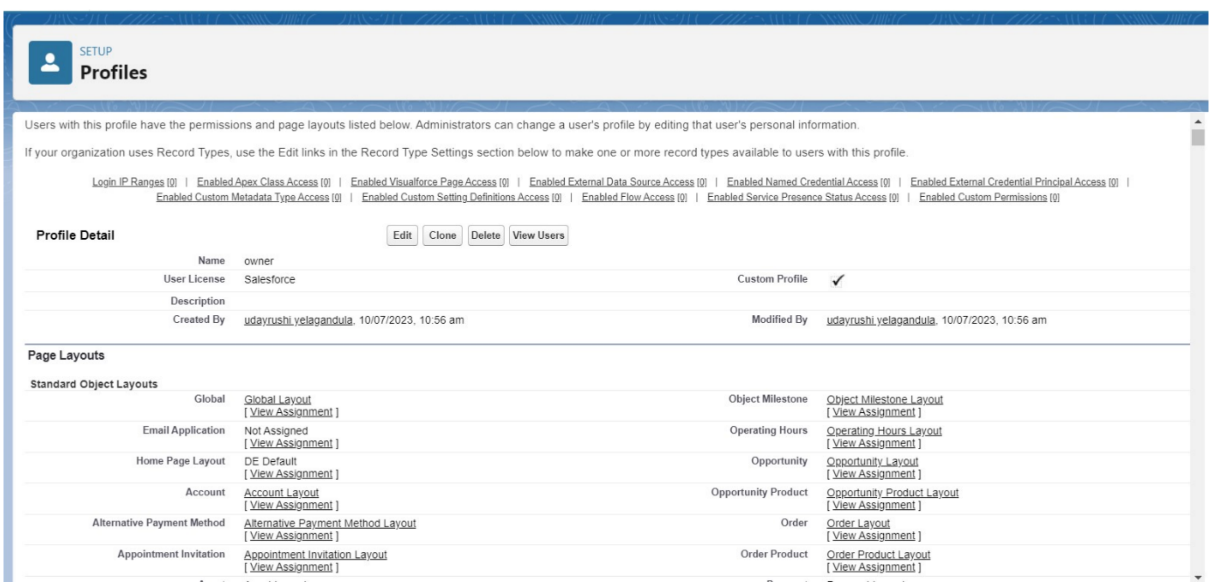
Enter the formula as “OR(ISBLANK(phone_number__c) , ISBLANK(email__c))” and check the syntax



5. Profiles :

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



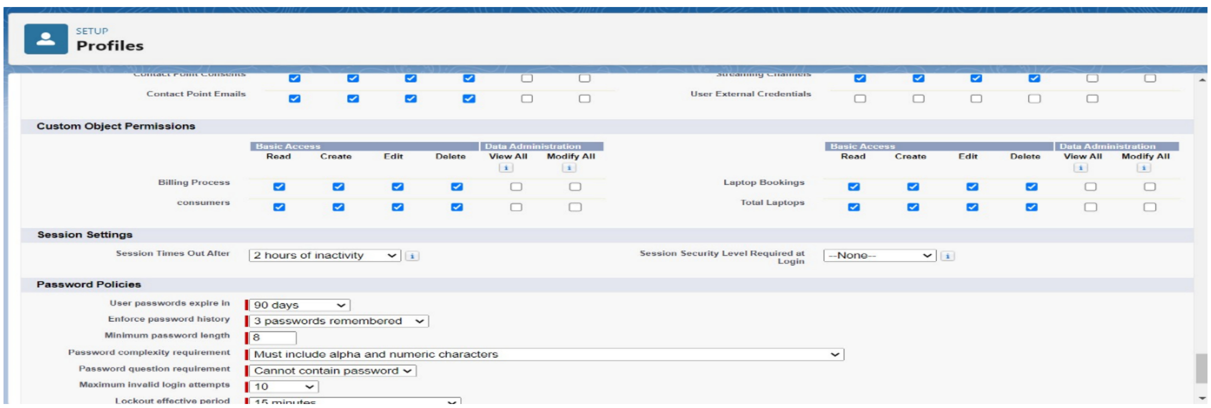
Give Access and Save it.

Agent Profile

1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired 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 for Total Laptops, consumer , Laptop Bookings and Billing Process objects as mentioned in the below diagram.



1. **Roles and Hierarchy**

   Creating owner Role:

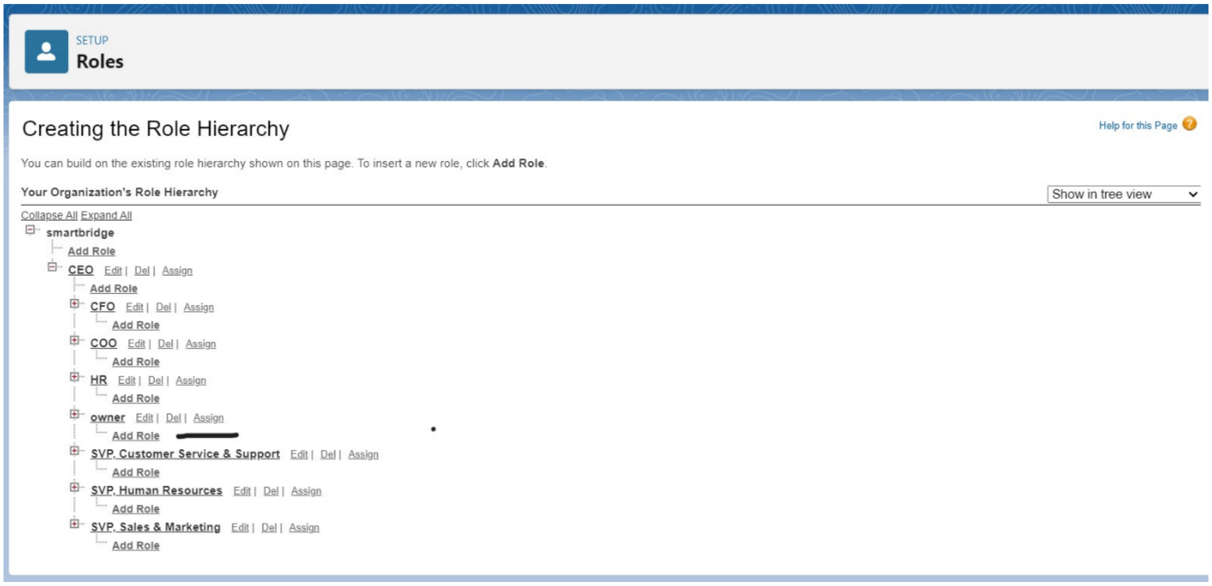
   1. Go to quick find >> Search for Roles >> click on set up roles.
   2. Click on Expand All and click on add role under whom this role works.

   Creating Agent roles

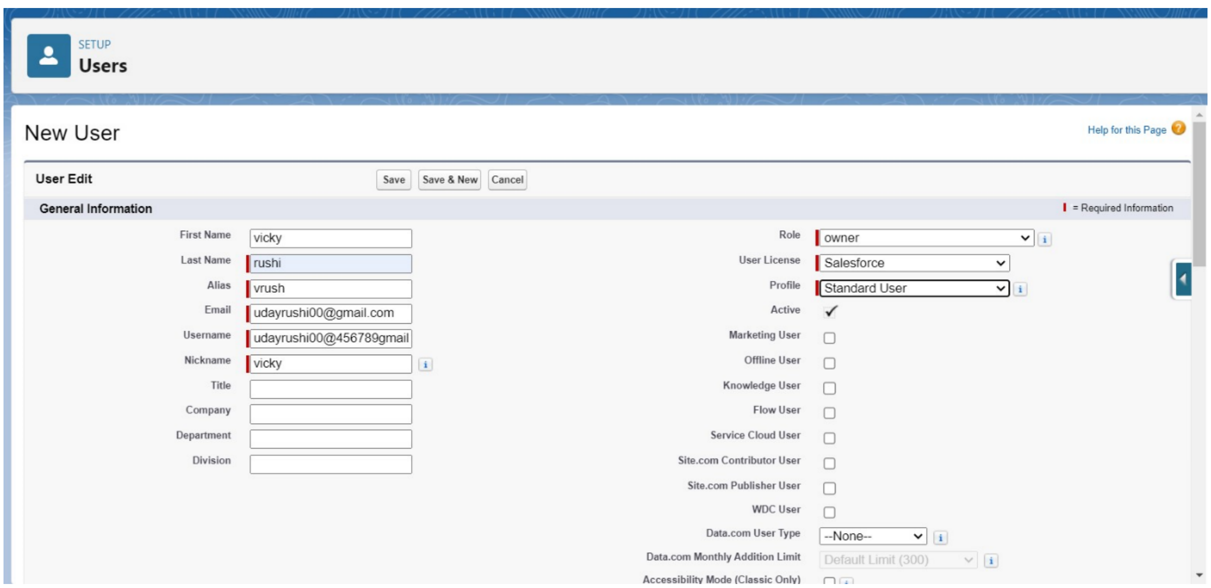
   Creating another two roles under Owner

1. Go to quick find - Search for Roles - click on set up roles.

2. Click plus on CEO role, and click add role under owner.



2. **Create User**



8. Flows :

Auto launched 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.

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

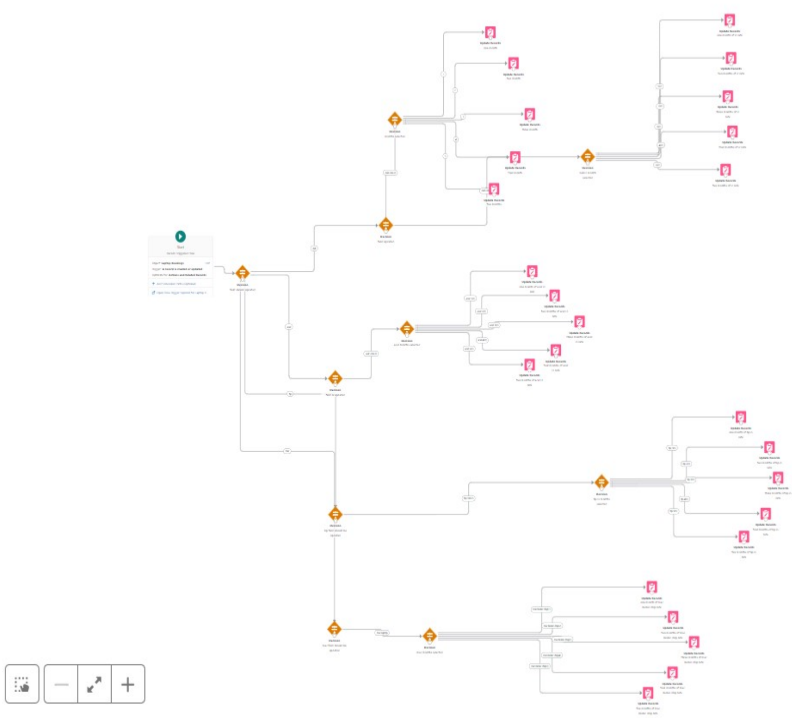
Flow Templates: Salesforce provides a library of pre-built flow templates that you can use as a starting point for your own flows. These templates cover a variety of use cases, from simple to complex.

Scheduled Flows: These are flows that you can schedule to run at specific times or intervals. 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 to build sophisticated logic into your flows.

Sub flows: Sub flows 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 related actions.



9. Apex :

1. Login to the trail head account and navigate to the gear account in the top right corner.
2. Then we can see the Developer console. Click on the developer console and you will navigate to a new console window.
3. Then you can see many tools in the Toolbar of the new console window. Click on File, New and Apex Class.
4. Enter the name of the class to create a new class file.

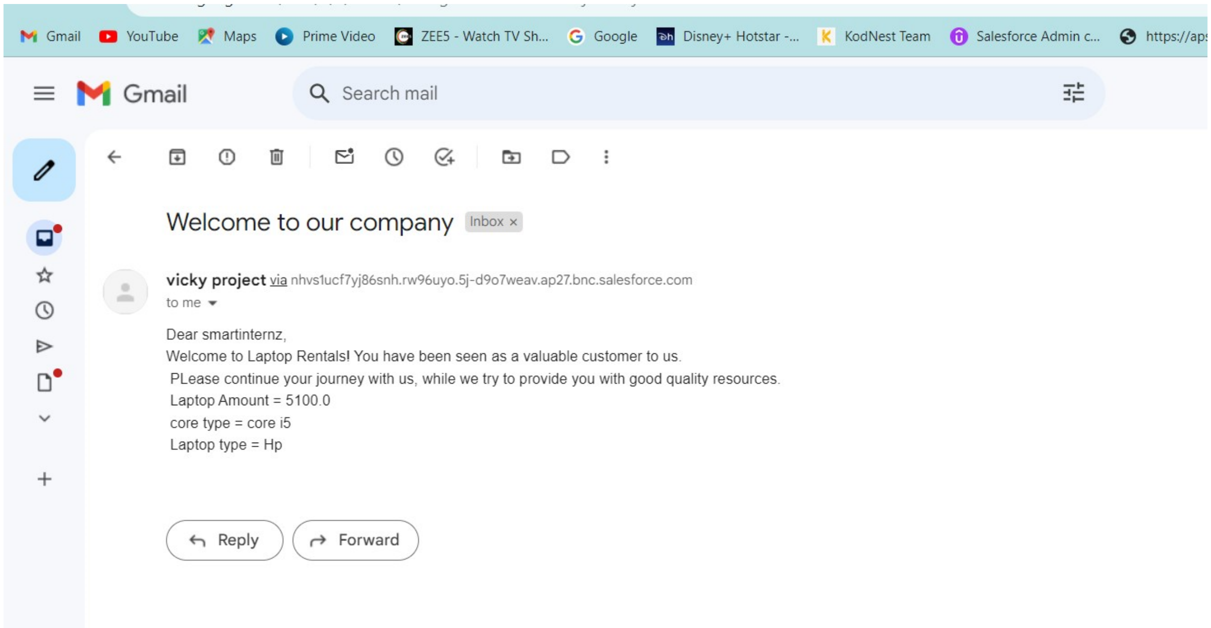
Create a new trigger :

The syntax for creating trigger is :

Trigger [trigger name] on [object name](Before/After event){}

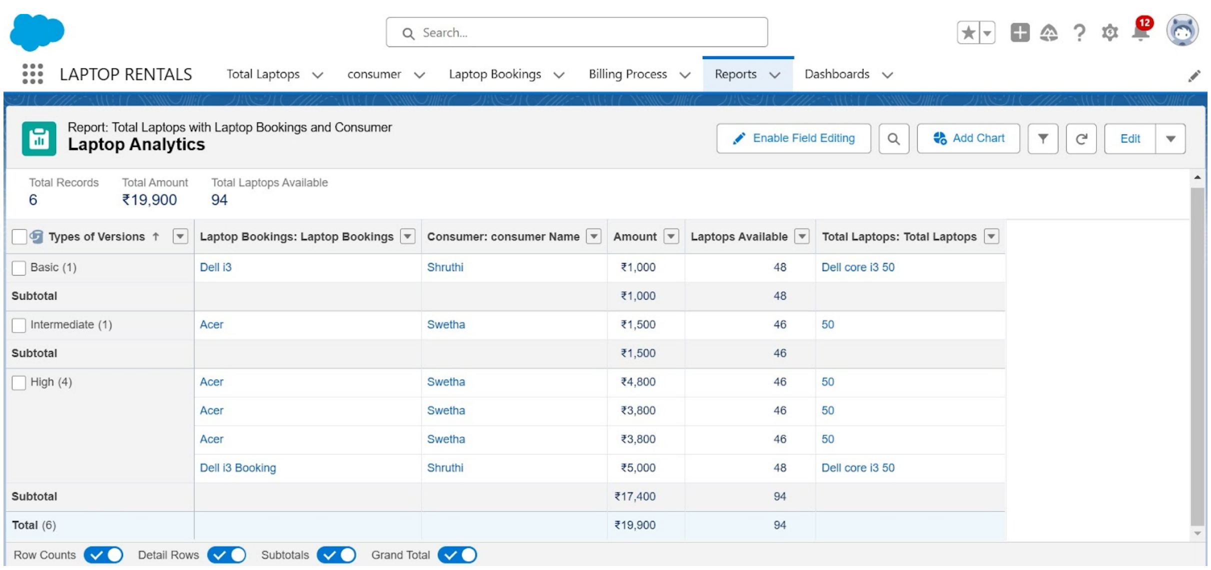
Handler Class:

```
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 Customer, \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 you with good quality resources. \n Laptop
Amount = ' + lap.Amount__c + ' \n core type = '+lap.core_type__c +' \n Laptop type =
'+lap.Laptop_name__c;
```

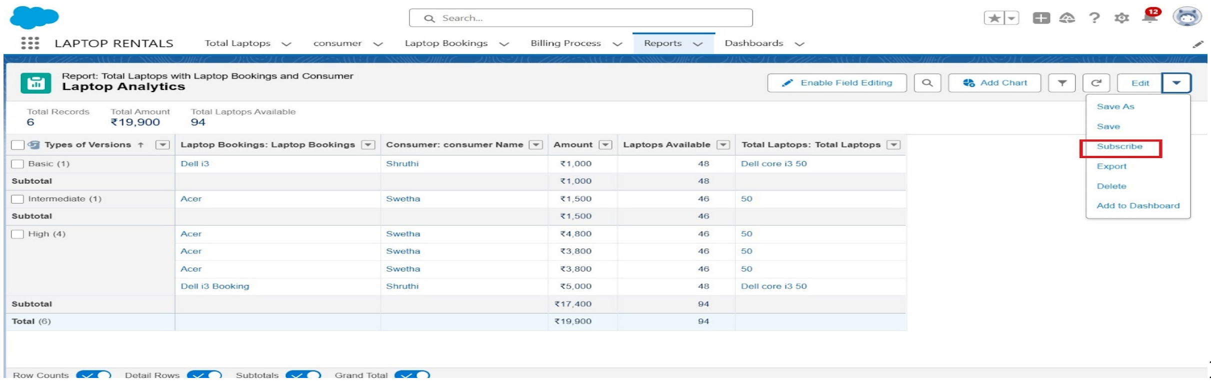


email.setPlainTextBody(body);

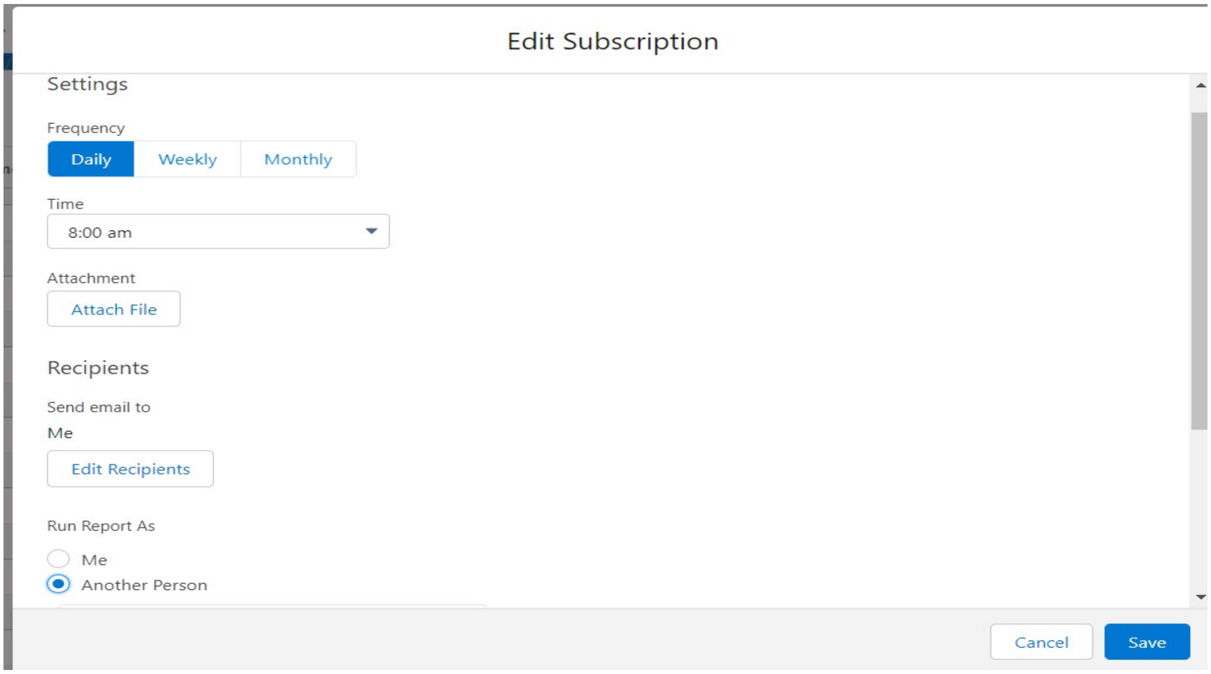
10. Create Report :



Types of Versions	Laptop Bookings: Laptop Bookings	Consumer: consumer Name	Amount	Laptops Available	Total Laptops: Total Laptops
Basic (1)	Dell i3	Shruthi	₹1,000	48	Dell core i3 50
Subtotal			₹1,000	48	
Intermediate (1)	Acer	Swetha	₹1,500	46	50
Subtotal			₹1,500	46	
High (4)	Acer	Swetha	₹4,800	46	50
	Acer	Swetha	₹3,800	46	50
	Acer	Swetha	₹3,800	46	50
	Dell i3 Booking	Shruthi	₹5,000	48	Dell core i3 50
Subtotal			₹17,400	94	
Total (6)			₹19,900	94	



11. Sharing report to owner



12. Dashboards :

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.

Create Dashboard

1. Go to the app >> click on the Dashboards tabs.
2. Give a Name and select the folder that was created, and click on create.
3. Select add component.
4. Select a Report and click on select.

1. Testing and Validation

- Unit Testing:
    a. Validate Apex Classes and Triggers to ensure smooth business logic execution. - User Interface Testing:
    b. Test form inputs and outputs for usability and accuracy

6. Key Scenarios Addressed by CRM in the Implementation Project

- Efficiently tracking and managing laptop rental inventory.
- Automating email communication to engage potential customers.
- Generating insights into rental trends to aid decision-making.
- Ensuring timely notifications for rental pickups and returns.

1. Conclusion Summary of Achievements:

- Optimizes laptop rental operations.
- Enhances customer engagement through automated communication.
- Provides actionable insights for better business decisions.
- The Salesforce implementation project demonstrates how powerful
- customization and automation capabilities can address complex
- business scenarios. By leveraging features such as custom objects,
- record types, validation rules, and Lightning Apps, the solution
- streamlines operations, enhances data accessibility, and ensures
- data integrity.
- Additionally, the use of email templates and page layouts provides a
- user-centric and professional approach to communication and user
- interface design. Salesforce's flexibility, scalability, and robust
- architecture enable businesses to meet their operational needs
- efficiently while preparing for future growth.