



CRM APPLICATION FOR LAPTOP RENTALS REPORT

Submitted by :

RAHUL SHARMA J

rahulmj8819@gmail.com

East Point College Of Engineering and Technology

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 :



The image shows two side-by-side screenshots. On the left, the Smart Internz website features a blue header with the company logo and a sub-header 'Build enterprise-quality apps fast to bring your ideas to life'. Below this is a list of features: 'Build apps fast with drag and drop tools', 'Customize your data model with clicks', 'Go further with Apex code', 'Integrate with anything using powerful APIs', 'Stay protected with enterprise-grade security', and 'Customize UI with clicks or any leading-edge web framework'. On the right, a Salesforce sign-up form titled 'Sign up for your Salesforce Developer Edition' is displayed, asking for first name, last name, email, role, and company information.

- 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.

The image shows the Salesforce Setup Home page. The left sidebar lists navigation options like Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and Administration. The main content area displays three cards: 'Get Started with Einstein Bots', 'Mobile Publisher', and 'Real-time Collaborative Docs', each with a 'Get Started' button.

2. Object Creation :

Salesforce objects are of two types:

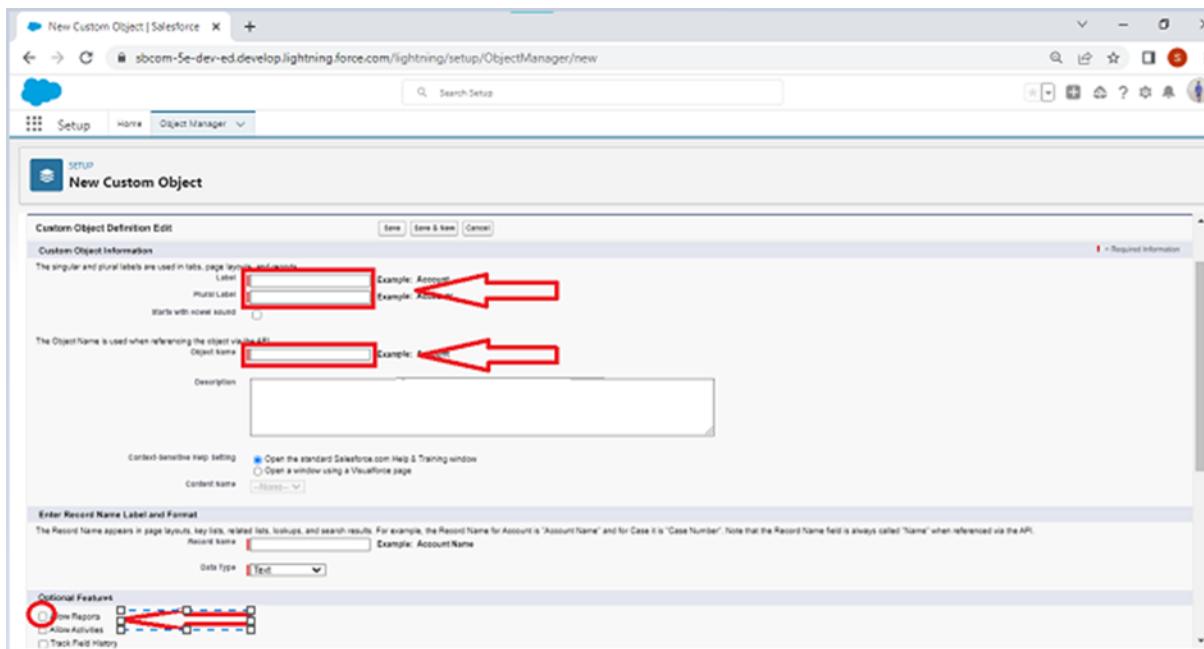
Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.

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.



SMARTBRIDGE
Let's Bridge the Gap
a Veranda Enterprise



- 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:



SMARTBRIDGE
Let's Bridge the Gap
a Veranda Enterprise



The screenshot shows the Salesforce App Manager interface. At the top, there is a search bar with the placeholder "Search Setup" and a "Search" button. Below the search bar, there is a navigation menu with options: "Setup", "Home", "Object Manager", and "App Manager". The "App Manager" option is highlighted with a red box and an arrow pointing to it. On the right side of the header, there are buttons for "New Lightning App" and "New Connected App", also highlighted with red boxes and arrows. The main content area is titled "Lightning Experience App Manager" and contains a sub-section "Clone Apps(Beta)". Below this, there is a note: "Quickly create new Lightning apps by cloning existing apps. To use the beta feature, indicate that you've read all legal requirements and agree to participate by toggling Enable App Cloning. See additional details and terms in the Winter '23 release notes." A toggle switch labeled "Enable App Cloning" is shown, with "Disabled" selected. The main list of apps is titled "35 Items > Sorted by App Name > Filtered by All appmenutems - Tabset Type". The list includes the following items:

App Name	Developer Name	Description	Last Modified	Type
1 All Tabs	AllTabs1	Build CRM Analytics dashboards and apps	04/12/2022, 10:13 am	Classic
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	04/12/2022, 10:13 am	Classic
3 App Launcher	AppLauncher	App Launcher Beta	04/12/2022, 10:13 am	Classic
4 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	04/12/2022, 10:18 am	Lightning
5 Chatter Desktop	Chatter/Desktop	Chatter Desktop is an Adobe AIR-based desktop application that lets Chatter users stay connected...	29/12/2022, 4:04 pm	Connected (Managed)
6 Chatter Mobile for BlackBerry	ChatterForBlackBerry	The Salesforce.com Chatter Mobile app lets you access Chatter data on the go. Use it to view feed...	29/12/2022, 4:05 pm	Connected (Managed)
7 College Management System	Nadeem	demo app	08/12/2022, 4:16 pm	Lightning
8 Community	Community	Salesforce CRM Communities	04/12/2022, 10:13 am	Classic
9 Content	Content	Salesforce CRM Content	04/12/2022, 10:13 am	Classic
10 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	04/12/2022, 10:13 am	Lightning

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.

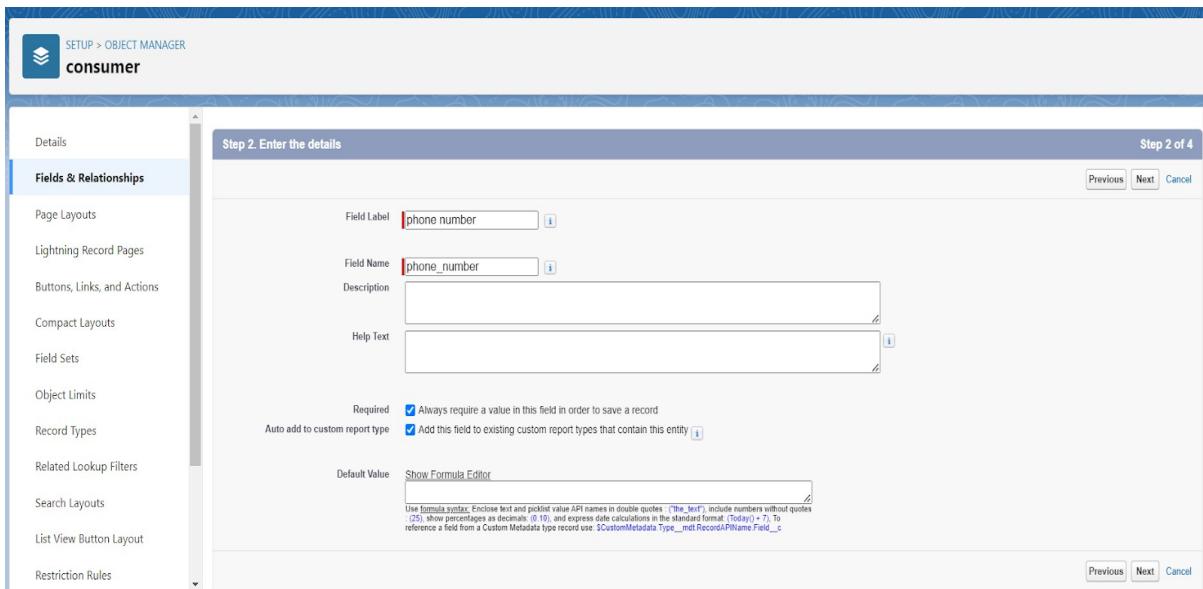
Types of Fields

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.



The screenshot shows the 'Step 2. Enter the details' screen for creating a new field. The 'Field Label' is set to 'phone number'. The 'Field Name' is 'phone_number'. The 'Required' checkbox is checked, and the 'Auto add to custom report type' checkbox is also checked. The 'Default Value' is set to 'Show Formula Editor'. A note at the bottom explains formula syntax. Navigation buttons 'Previous', 'Next', and 'Cancel' are visible at the top right and bottom right.

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.

The screenshot shows the Salesforce Setup interface for creating a new custom field. The top navigation bar says "SETUP > OBJECT MANAGER consumer". On the left, a sidebar lists various object configuration options like Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, etc. The main panel is titled "consumer New Custom Field" and "Step 2. Enter the details". It contains the following fields:

- Field Label: Email
- Field Name: Email
- Description: (empty)
- Help Text: (empty)
- Required: Always require a value in this field in order to save a record
- Unique: Do not allow duplicate values
- External ID: Set this field as the unique record identifier from an external system
- Auto add to custom report type: Add this field to existing custom report types that contain this entry
- Default Value: Show Formula Editor

At the bottom right, there are "Previous", "Next", and "Cancel" buttons, and a "Step 2 of 4" indicator.

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.

The screenshot shows the 'Step 2. Enter the details' page for creating a new field in the 'consumer' object. The 'Field Label' is set to 'Address'. The 'Field Name' is also 'Address'. There is no description or help text provided. Under the 'Required' section, the checkbox 'Always require a value in this field in order to save a record' is checked. Below that, there is an option to 'Auto add to custom report type' with a checkbox checked. The 'Default Value' field is set to 'Show Formula Editor'. A note below it says: 'Use formula syntax. Enclose text and picklist value API names in double quotes ("Name_Label"). Include numbers without quotes (25), show percentages as decimals (.910), and express date calculations in the standard format: (Today) + 7; To reference a field from a Custom Metadata type record use: \$CustomMetadataType__mdtRecords\$!Name_Field__c'. Navigation buttons at the bottom include 'Previous', 'Next', and 'Cancel'.

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



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

Restriction Rules

Field Label consumer status

Values Use global picklist value set Enter values, with each value separated by a new line

student
employee
others

Display values alphabetically, not in the order entered
 Use first value as default value,
 Restrict picklist to the values defined in the value set

Field Name consumer_status

Description

Help Text

Required Always require a value in this field in order to save a record
Auto add to custom report type Add this field to existing custom report types that contain this entity

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



The screenshot shows the Salesforce setup interface for creating a new field. The left sidebar lists various object configuration options like Details, Fields & Relationships, Page Layouts, etc. The main area is titled 'Laptop Bookings'. Under 'Fields & Relationships', a new field is being defined. The 'Field Label' is set to 'Laptop names'. The 'Values' section has two options: 'Use global picklist value set' (unchecked) and 'Enter values, with each value separated by a new line' (checked). Below this, a text input box contains the values: 'Dell', 'Acer', 'Hp', and 'Mac'. There are also three checkboxes at the bottom of the values section: 'Display values alphabetically, not in the order entered' (unchecked), 'Use first value as default value' (unchecked), and 'Restrict picklist to the values defined in the value set' (checked). The 'Field Name' is 'Laptop_type', and there are fields for 'Description' and 'Help Text' which are currently empty.

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



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

Fields & Relationships

8 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Currency(18, 0)		
core type	core__c	Picklist	Laptop names	
Created By	CreatedById	Lookup(User)		
Laptop Bookings Name	Name	Text(80)		✓
Laptop names	Laptop_type__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Master-Detail(consumer)		✓
Total no of laptops	Total_no_of_laptops__c	Master-Detail(Total laptops)		✓

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

SETUP > OBJECT MANAGER

Total laptops

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

Total laptops

New Custom Field

Step 1. Choose the field type

Specify the type of information that the custom field will contain.

Data Type

None Selected Select one of the data types below.

Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

Roll Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Master-Detail Relationship Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

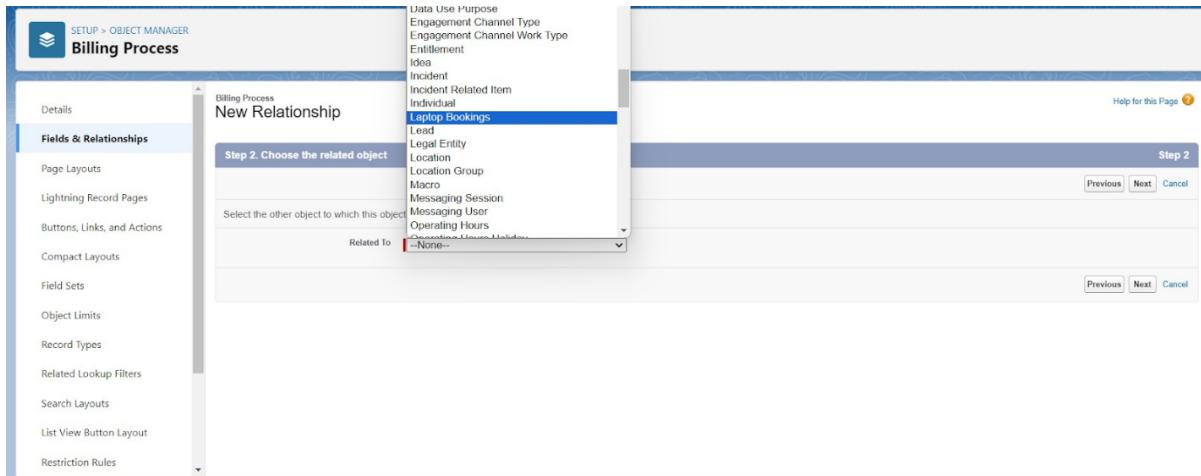
- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

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”



SETUP > OBJECT MANAGER
Total laptops

Field Label Field Name

Auto add to custom report type Add this field to existing custom report types that contain this entity

Formula Return Type

None Selected Select one of the data types below.

Checkbox Calculate a boolean value.
Example: `[TODAY() > CloseDate]`

Currency Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: `[Gross Margin = Amount - Cost_c]`

Date Calculate a date, for example, by adding or subtracting days to other dates.
Example: `[Reminder Date + CloseDate - 7]`

DateTime Calculate a date/time, for example, by adding a number of hours or days to another date/time.
Example: `[Next = NOW() + 1]`

Number Calculate a numeric value.
Example: `[Fahrenheit = 1.8 * Celsius_c + 32]`

Percent Calculate a percent and automatically add the percent sign to the number.
Example: `[Discount = (Amount - Discounted_Amount_c) / Amount]`

Text Create a text string, for example, by concatenating other text fields.
Example: `[Full Name = LastName & ", " & FirstName]`

Time Calculate a time, for example, by adding a number of hours to another time.
Example: `[Next = TIMEVALUE(NOW()) + 1]`

Options Example: 999

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



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
Restriction Rules

Display an error if Discount is more than 30%
If this formula expression is true, display the text defined in the Error Message area

Insert Field Insert Operator OR(ISBLANK(phone_number__c), ISBLANK(email__c))

Functions -- All Function Categories -- ABS ACOS ADDMONTHS AND ASCII ASIN

Check Syntax No errors found

Error Message Example: Discount percent cannot exceed 30%
This message will appear when Error Condition formula is true
Error Message Please fill the phone number and email id

This error message can either appear at the top of the page or below a specific field on the page
Error Location Top of Page Field

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

SETUP
Profiles

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.

Login IP Ranges [] | Enabled Apex Class Access [] | Enabled Visualforce Page Access [] | Enabled External Data Source Access [] | Enabled Named Credential Access [] | Enabled External Credential Principal Access [] | Enabled Custom Metadata Type Access [] | Enabled Custom Setting Definitions Access [] | Enabled Flow Access [] | Enabled Service Presence Status Access [] | Enabled Custom Permissions []

Profile Detail

Name	owner	Custom Profile	✓
User License	Salesforce		
Description			
Created By	udayrushi.yelagandula, 10/07/2023, 10:56 am	Modified By	udayrushi.yelagandula, 10/07/2023, 10:56 am

Page Layouts

Standard Object Layouts	Global	Object Milestone
Email Application	Not Assigned	Operating Hours
Home Page Layout	DE Default	Opportunity
Account	Account Layout	Opportunity Product
Alternative Payment Method	Alternative Payment Method Layout	Order
Appointment Invitation	Appointment Invitation Layout	Order Product

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.

The screenshot shows the 'Profiles' setup page. Under 'Custom Object Permissions', there are two sections: 'Billing Process' and 'consumers' on the left, and 'Laptop Bookings' and 'Total Laptops' on the right. Both sections have 'Basic Access' and 'Data Administration' rows with checkboxes for Read, Create, Edit, Delete, View All, and Modify All. The 'Billing Process' and 'consumers' section has checkboxes checked for all permissions except Modify All. The 'Laptop Bookings' and 'Total Laptops' section has checkboxes checked for Read, Create, Edit, Delete, and View All. Below this, there are 'Session Settings' and 'Password Policies' sections.

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.



 SETUP Roles

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

Your Organization's Role Hierarchy

[Collapse All](#) [Expand All](#) [Show in tree view](#)

- smartbridge
 - [Add Role](#)
 - CEO** [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - CFO** [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - COO** [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - HR** [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - owner** [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - SVP.Customer Service & Support** [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - SVP.Human Resources** [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - SVP.Sales & Marketing** [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)

2. Create User

New User

Help for this Page 

User Edit I = Required Information

General Information

First Name	vicky	Role	owner
Last Name	rushi	User License	Salesforce
Alias	vrush	Profile	Standard User
Email	udayrushi00@gmail.com	Active	<input checked="" type="checkbox"/>
Username	udayrushi00@456789gmail	Marketing User	<input type="checkbox"/>
Nickname	vicky	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
		Site.com Publisher User	<input type="checkbox"/>
		WDC User	<input type="checkbox"/>
		Data.com User Type	-None-
		Data.com Monthly Addtive Limit	Default Limit (300)
		Accessibility Mode (Classic Only)	<input type="checkbox"/>

Save **Save & New** **Cancel**

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.

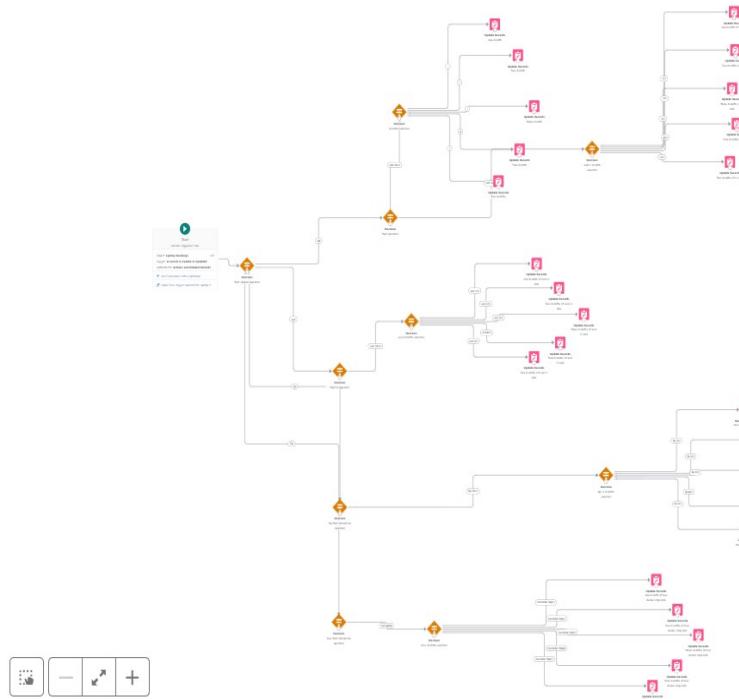
Flow Templates: Salesforce provides a library of pre-built flow templates that you can use as a starting point for your own flows. These templates cover a variety of use cases, from simple to complex.

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;
```



Gmail YouTube Maps Prime Video ZEE5 - Watch TV Sh... Google Disney+ Hotstar ... KodNest Team Salesforce Admin c... https://ap...

Gmail Search mail

Welcome to our company Inbox x

vicky project via nhvs1ucf7yj86snh.rw96uyo.5j-d9o7weav.ap27.bnc.salesforce.com to me ▾

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 = 5100.0
core type = core i5
Laptop type = Hp

Reply Forward

email.setPlainTextBody(body);

10. Create Report :

LAPTOP RENTALS Total Laptops consumer Laptop Bookings Billing Process Reports Dashboards

Report: Total Laptops with Laptop Bookings and Consumer Laptop Analytics

Total Records	Total Amount	Total Laptops Available			
6	₹19,900	94			
Enable Field Editing Add Chart Edit					
<input type="checkbox"/> Types of Versions ↑	Laptop Bookings: Laptop Bookings	Consumer: consumer Name	Amount	Laptops Available	Total Laptops: Total Laptops
<input type="checkbox"/> Basic (1)	Dell i3	Shruthi	₹1,000	48	Dell core i3 50
Subtotal			₹1,000	48	
<input type="checkbox"/> Intermediate (1)	Acer	Swetha	₹1,500	46	50
Subtotal			₹1,500	46	
<input type="checkbox"/> 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	

Row Counts Detail Rows Subtotals Grand Total



SMARTBRIDGE
Let's Bridge the Gap
a Veranda Enterprise



LAPTOP RENTALS Total Laptops consumer Laptop Bookings Billing Process Reports Dashboards

Report: Total Laptops with Laptop Bookings and Consumer Laptop Analytics

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

Enable Field Editing Add Chart C Edit Save As Save Subscribe Export Delete Add to Dashboard

11.

Sharing report to owner

Edit Subscription

Settings

Frequency

Daily Weekly Monthly

Time

8:00 am

Attachment

Attach File

Recipients

Send email to

Me

Edit Recipients

Run Report As

Me Another Person

Cancel Save

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.