

CRM Application to Manage a Mall

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CRM Application to Manage a Mall

1. Project Overview

The Mall CRM (Customer Relationship Management) application is designed to streamline operations, enhance customer experience, and improve tenant management in shopping malls. The application will leverage Salesforce's capabilities to manage customer data, track sales, coordinate tenant relationships, and execute marketing campaigns efficiently.

Key Highlights:

Centralized management of tenant and customer data.

Improved communication between mall management, tenants, and customers.

Real-time analytics for footfall, sales, and customer engagement.

Enhanced customer service and loyalty program implementation.

2. Objectives

1. Customer Engagement:

Improve customer satisfaction through personalized interactions and tailored offers.

2. Tenant Management:

Streamline lease management, sales tracking, and issue resolution for tenants.

3. Marketing Automation:

Automate marketing campaigns and loyalty programs to attract and retain customers.

4. Data-Driven Insights:

Use analytics to make informed decisions about mall operations and marketing strategies.

5. Resource Optimization:

Efficient allocation of resources for maintenance, security, and other services.

3. Salesforce Key Features and Concept Utilization

Key Features:

Sales Cloud: Manage tenant leases and customer sales records.

Service Cloud: Improve customer support with a dedicated helpdesk for mall inquiries.

Marketing Cloud: Automate campaigns, email marketing, and loyalty programs.

Analytics Cloud: Gain actionable insights from mall operations and sales data.

Community Cloud: Create a tenant portal for seamless communication.

Mobile App Integration: Provide real-time updates for mall management and customers.

Concept Utilization:

Objects and Fields: Create custom objects for tenants, customers, and leases.

Workflow Automation: Automate lease renewals, maintenance requests, and marketing campaigns.

Reports and Dashboards: Generate insights into sales performance, footfall, and customer engagement.

Apex and Visualforce: Customize functionalities to meet unique mall requirements.

Lightning Web Components (LWC): Build user-friendly interfaces for the application.

Security and Access Control: Ensure data security for tenants and customers using Salesforce's Role Hierarchy and Sharing Rules.

4. Project Requirements

4.1. Functional Requirements:

1. Tenant Management:

Maintain tenant records, lease agreements, and rental payments.

2. Customer Relationship:

Manage customer profiles, purchase history, and feedback.

3. Marketing Automation:

Plan and execute marketing campaigns and loyalty programs.

4. Analytics and Reporting:

Provide dashboards for sales, customer footfall, and tenant performance.

5. Service Desk:

Enable tenants and customers to raise queries or complaints.

4.2. Non-Functional Requirements:

Scalability to accommodate large malls with multiple tenants and customers.

Security for sensitive customer and tenant data.

High availability and real-time data updates.

4.3. Tools and Resources Needed:

Salesforce Platform: CRM development and integration.

Salesforce AppExchange: Prebuilt apps for additional features.

Integration Tools: For payment systems, POS systems, and footfall counters.

Design Tools: Figma or Adobe XD for user interface design.

Database: Salesforce database for data storage.

Training Resources: For onboarding mall staff and tenants.

5. Use Cases

1. Tenant Onboarding:

Automate the process of signing lease agreements and assigning shop spaces.

2. Customer Loyalty Program:

Track purchases and reward loyal customers with discounts and special offers.

3. Marketing Campaigns:

Launch seasonal or event-based promotions targeting specific customer segments.

4. Footfall Analytics:

Monitor and report on customer visits to optimize operations.

5. Issue Resolution:

Create a ticketing system for tenants and customers to report issues.

6. Introduction to Salesforce

Salesforce is a cloud-based customer relationship management (CRM) platform that helps businesses manage sales, service, marketing, and analytics. It offers a wide range of tools and

functionalities to automate business processes, enhance customer interactions, and generate insights.

Key Features of Salesforce:

Customization: Create tailored solutions for unique business needs.

Scalability: Supports businesses of all sizes.

Integration: Seamlessly integrates with third-party applications.

Security: Provides robust security measures for data protection.

Automation: Enables workflows, approvals, and process automation.

7. Required Steps to Start the Project

1. Research and Analysis:

Gather requirements from mall management and tenants.

2. Salesforce Environment Setup:

Set up a Salesforce Developer Org for testing and development.

3. Define Objects:

Create custom objects for tenants, customers, leases, and feedback.

4. Build Workflows:

Automate recurring tasks like lease renewals and complaint resolution.

5. Design Interfaces:

Use LWC to create user-friendly tenant and customer portals.

6. Develop Reports:

Configure dashboards for operational insights.

7. Test and Deploy:

Conduct thorough testing before deploying the solution.

8. Potential Use Cases

1. Digital Directory:

A digital directory for customers to find shops, offers, and events in the mall.

2. Tenant Performance Monitoring:

Analyze individual tenant sales performance.

3. Maintenance Scheduling:

Automate scheduling of cleaning and repairs.

CRM Application for Mall and Property Management with Recruitment Features

1. Project Overview

The CRM application aims to centralize and optimize mall management, property leasing, and recruitment for property-related roles. It ensures seamless communication between stakeholders, including tenants, customers, and recruiters, while leveraging Salesforce's advanced features to improve efficiency.

Purpose:

- Enhance customer engagement for mall visitors.
- Streamline tenant and lease management for mall properties.
- Simplify recruitment for property management roles, including facility managers, security personnel, and maintenance staff.
- Provide real-time analytics and reporting for operational and recruitment activities.

2. Objectives

1. Customer Relationship Management:

Improve customer satisfaction and loyalty through personalized services and effective communication.

2. Property and Tenant Management:

Automate lease agreements, rent collection, and issue tracking for tenants.

3. Recruitment Automation:

Streamline hiring for property management roles by managing job postings, applications, and candidate tracking.

4. Operational Efficiency:

Reduce manual effort by automating routine tasks and workflows.

5. Data Insights:

Provide dashboards and analytics for footfall, tenant performance, and recruitment efficiency.

3. Usage Cases

3.1 Customer Relationship Management:

- **Customer Profiling:** Maintain detailed records of mall visitors, including their preferences and feedback.
- **Loyalty Programs:** Reward frequent visitors with exclusive discounts and offers.
- **Event Management:** Send automated invites and updates for mall events to registered customers.

3.2 Tenant and Property Management:

- **Tenant Onboarding:** Automate the process of onboarding new tenants with digital contracts and payment systems.
- **Lease Management:** Track lease expiry dates, renewals, and payment schedules.
- **Maintenance Requests:** Enable tenants to raise service requests through a dedicated portal.

3.3 Recruitment Management:

- **Job Postings:** Automate the creation and posting of job openings for property-related roles.
- **Application Tracking:** Manage applicant records, resumes, and recruitment stages.
- **Interview Scheduling:** Coordinate interviews and track their outcomes.

3.4 Analytics and Reporting:

- **Footfall Analysis:** Monitor and analyze customer visits.
- **Sales Insights:** Generate reports on tenant sales and mall revenue.
- **Recruitment Metrics:** Track recruitment timelines, cost per hire, and applicant sources.

4. Introduction to Salesforce

What is Salesforce?

Salesforce is a leading cloud-based CRM platform that helps businesses manage sales, marketing, service, and analytics. It offers robust tools for automating workflows, managing customer data, and generating actionable insights.

Key Features of Salesforce:

1. **Customization:** Build tailored solutions for mall management and recruitment.
2. **Workflow Automation:** Automate repetitive tasks like lease renewals and application tracking.
3. **Reports and Dashboards:** Gain insights into operations, customer engagement, and recruitment.
4. **Integration:** Connect with third-party tools for payment, HR, and analytics.
5. **Data Security:** Ensure data integrity and confidentiality with advanced security features.

5. Requirements

Functional Requirements:

1. Customer Relationship Management:

- Maintain visitor profiles, preferences, and feedback.
- Execute loyalty programs and event campaigns.

2. Tenant Management:

- Manage tenant records, leases, and financial transactions.
- Provide a tenant portal for communication and issue reporting.

3. Recruitment Management:

- Automate job posting, application tracking, and candidate communication.
- Provide an employee database for property management roles.

4. Analytics and Reporting:

Non-Functional Requirements:

- Scalability: Support for multiple malls and large customer/tenant databases.
- User-Friendly Interfaces: Easy-to-navigate portals for customers, tenants, and recruiters.
- Security: Ensure role-based access control and data encryption.

Resources Needed:

1. Salesforce Platform: For development and deployment.
2. AppExchange Apps: Prebuilt applications for property and recruitment management.
3. Integration Tools: APIs for HR systems, payment gateways, and analytics platforms.
4. Training Materials: To onboard staff and tenants to the new system.
6. Salesforce Feature Utilization
 - For Customer Management:
 - Marketing Cloud: Automate email campaigns and loyalty programs.

- Service Cloud: Provide a helpdesk for customer and tenant queries.

For Property Management:

- Sales Cloud: Manage leases, rent collection, and tenant records.
- Community Cloud: Enable tenants to access a self-service portal.

For Recruitment:

- Salesforce Talent Management: Post jobs, track applications, and manage recruitment stages.
- Workflow Rules: Automate interview scheduling and status updates.
- Chatter: Facilitate internal collaboration during hiring processes.

Customization Options:

- Custom Objects: Create objects for tenants, customers, properties, and job applications.
- Lightning Web Components (LWC): Build user-friendly portals.
- Apex and Visualforce: Implement unique functionalities for tenant and recruitment needs.

7. Use Cases for CRM Application

1. Event-Based Marketing Campaigns:

Run automated campaigns for mall events and promotions to attract visitors.

2. Integrated Lease Management:

Notify tenants about lease renewal dates and manage rental payments through an integrated system.

3. Automated Recruitment:

Post property-related job openings across platforms and manage applications centrally.

4. Customer Feedback Collection:

Enable mall visitors to submit feedback through kiosks or apps.

5. Footfall and Revenue Analysis:

Monitor daily customer footfall and analyze sales data to identify trends.

8. Steps to Start the Project

1. Requirement Gathering:

Collaborate with mall management to define customer, tenant, and recruitment needs.

2. Salesforce Environment Setup:

Set up a Salesforce Developer Org for development and testing.

3. Data Modeling:

Create custom objects and fields for tenants, properties, customers, and jobs.

4. Interface Design:

Use Lightning Web Components to design intuitive user interfaces.

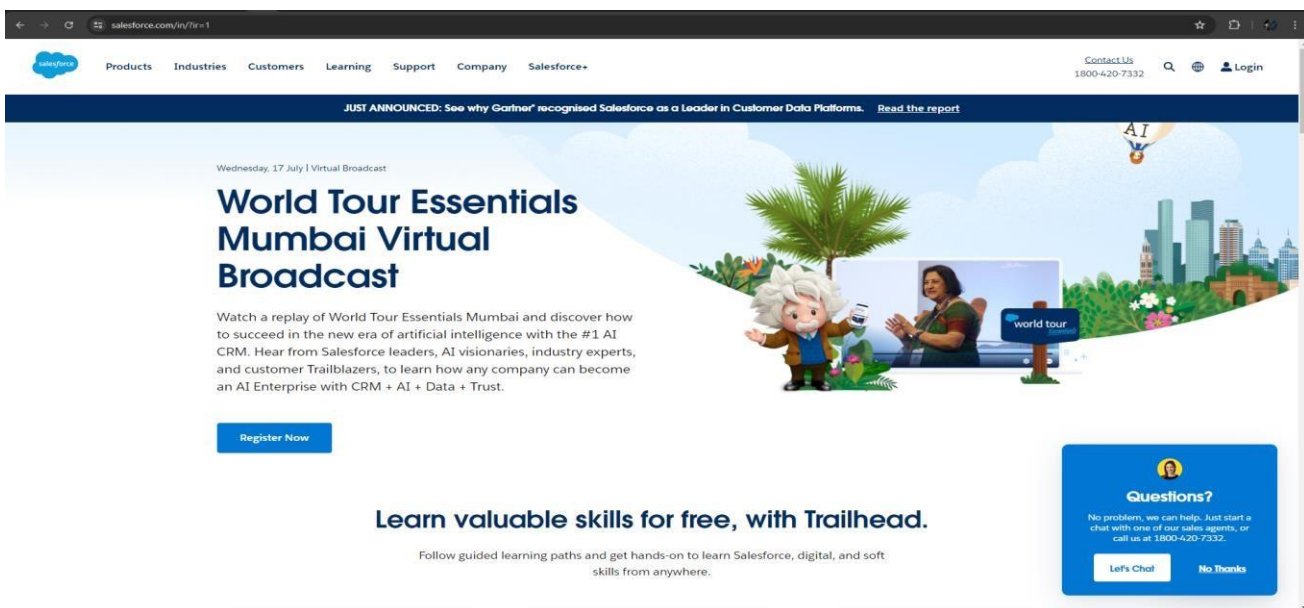
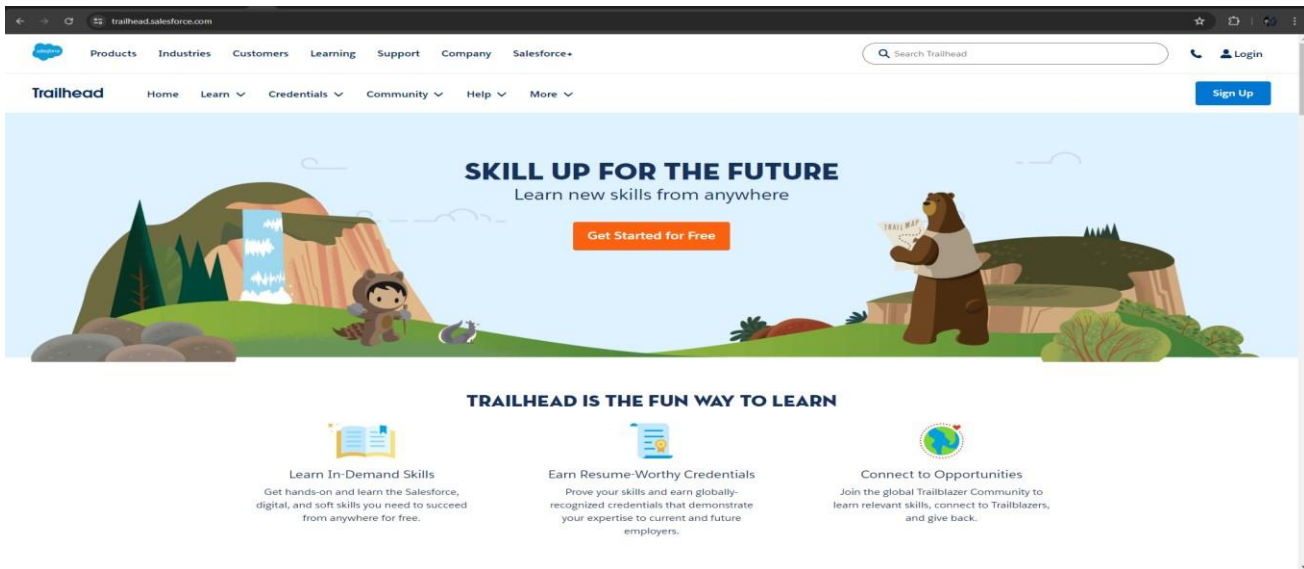
5. Workflow Development:

Automate key processes like lease renewals, job postings, and marketing campaigns.

6. Testing and Deployment:

Conduct end-to-end testing before deploying the application to production.

PROJECT



REQUIREMENTS: -

i. Website Integration Requirements:

Implement a form on the website for users to express interest in property listings. Ensure the form captures essential details such as name, contact information, preferred property type, location, budget, etc. Set up validation rules to ensure data accuracy and completeness. Integrate the form submission process with Salesforce.

ii. Salesforce Configuration Requirements:

Set up Salesforce objects and fields to store customer data. This includes fields for name, contact information, preferences, approval status, etc. Define workflows or processes to automate the creation of records when a user submits the form on the website. Implement validation rules and data integrity checks to maintain data quality. Configure Salesforce

security settings to control access to customer records based on approval status. iii. Approval

Process Requirements:

Define criteria for categorizing users as approved or non-approved based on specific parameters such as budget, property preferences, etc. Implement an approval process in Salesforce to review and approve users. Set up email notifications or alerts to notify relevant stakeholders when a user is approved or rejected. Ensure that approved users are granted access to curated property listings tailored to their preferences. iv. User Experience

Requirements:

Design user interfaces in Salesforce for managing customer records, approval processes, and property listings. Ensure a seamless user experience for both customers and internal users interacting with Salesforce. Provide training and documentation for internal staff on how to use the Salesforce system effectively.

v. Integration Testing and Quality Assurance Requirements:

Conduct thorough testing of the integration between the website and Salesforce to ensure data is accurately captured and transferred. Perform end-to-end testing of the approval process to verify that users are categorized correctly and granted appropriate access. Identify and resolve any issues or bugs encountered during testing.

6. PROJECT IMPLEMENTATION: -

Step 1: Creating a Developer Org Account.

- Go to <https://developer.salesforce.com/signup>.

developer.salesforce.com/signup

Build enterprise-quality apps fast to bring your ideas to life

- 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
- Customize UI with clicks or any leading-edge web framework

Sign up for your Salesforce Developer Edition
A full-featured copy of the Platform, for free

Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.

First Name*
Your first name

Last Name*
Your last name

Email*
Your email address

Role*
Your job role

Company*
Company Name

Country/Region*
Country/Region

Postal Code*
Your postal code

Username*
jane@company.sandbox
Your username must be in the form of an email address (it does not have to be real). It

- Fill the details to create a Developer Org Account.
- All the details are must to ensure seamless experience for creating a Developer Org Account.
- One Point to Note that Username must be unique, and you can create any number of accounts using the same E-mail address.

to bring your ideas to life

- Build apps fast with drag and drop tools
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- Customize UI with clicks or any leading-edge web framework

Email*
Your email address

Role*
Your job role

Company*
Company Name

Country/Region*
Country/Region

Postal Code*
Your postal code

Username*
jane@company.sandbox
Your username must be in the form of an email address (it does not have to be real). It must be unique and cannot be associated with another Salesforce login credential. Read

☐ I agree to the Main Services Agreement – Developer Services and Salesforce Program Agreement.

Sign me up

Already have a Salesforce Developer Environment?
Log in

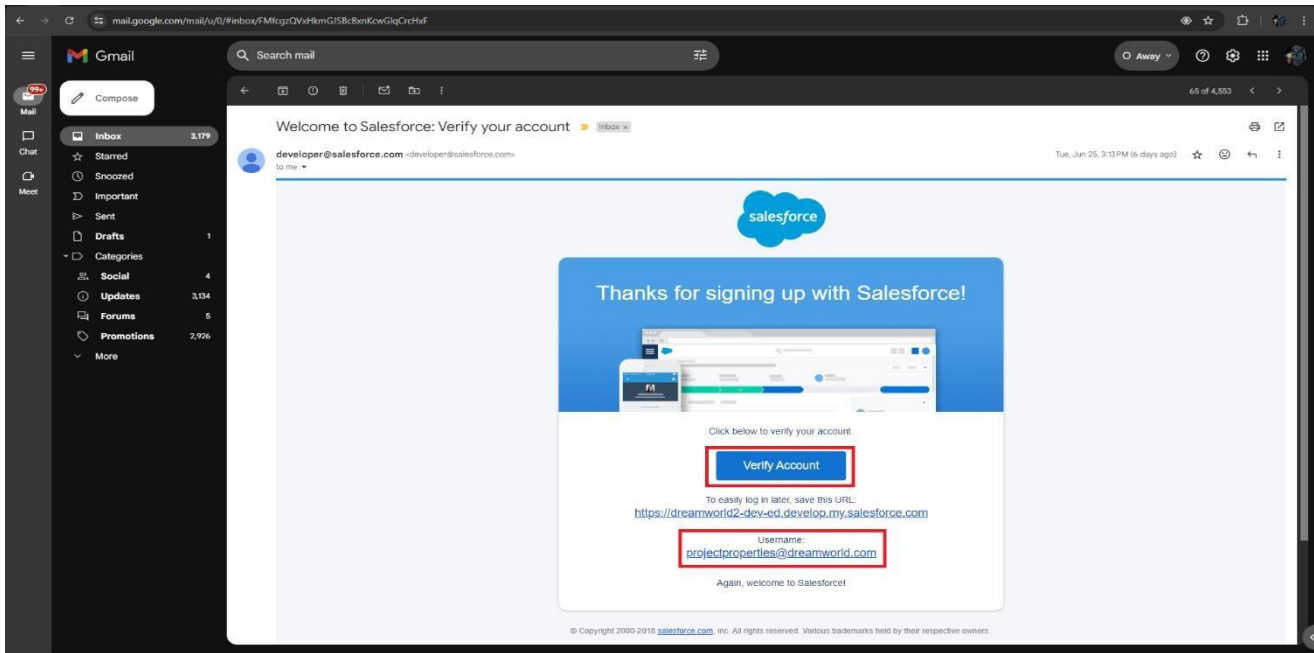
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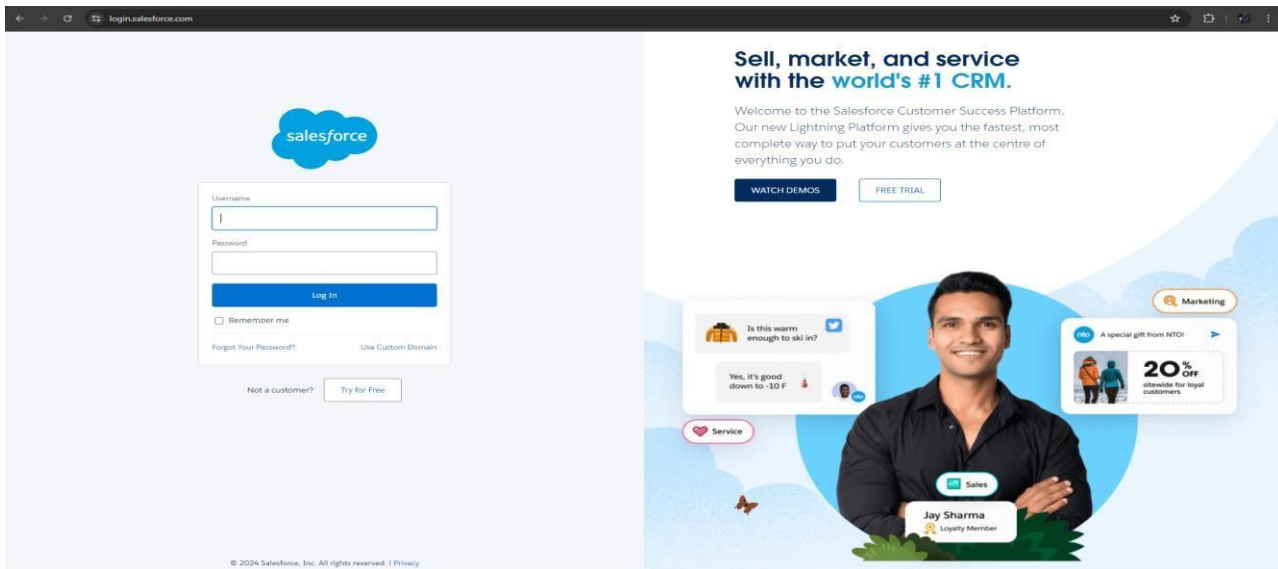
- After Entering the Details proceed with accepting the Terms and Conditions and click on Sign me Up button as shown in above picture.

Step 2: Activation of Developer Org Account.

- After clicking on Sign me Up button it will re-directs to page where it shows that account has created.
- Go to the registered email address inbox that you used while signing up. The activation of account email could take 10-15 minutes to receive to the registered email address.



- Click on the verify account to activate your account.
- Give a password and answer a security question and click on change password.
- Then you will be re-directed to login page to login into Salesforce Developer Org.



Final Summary of Salesforce Implementation for Mall Management

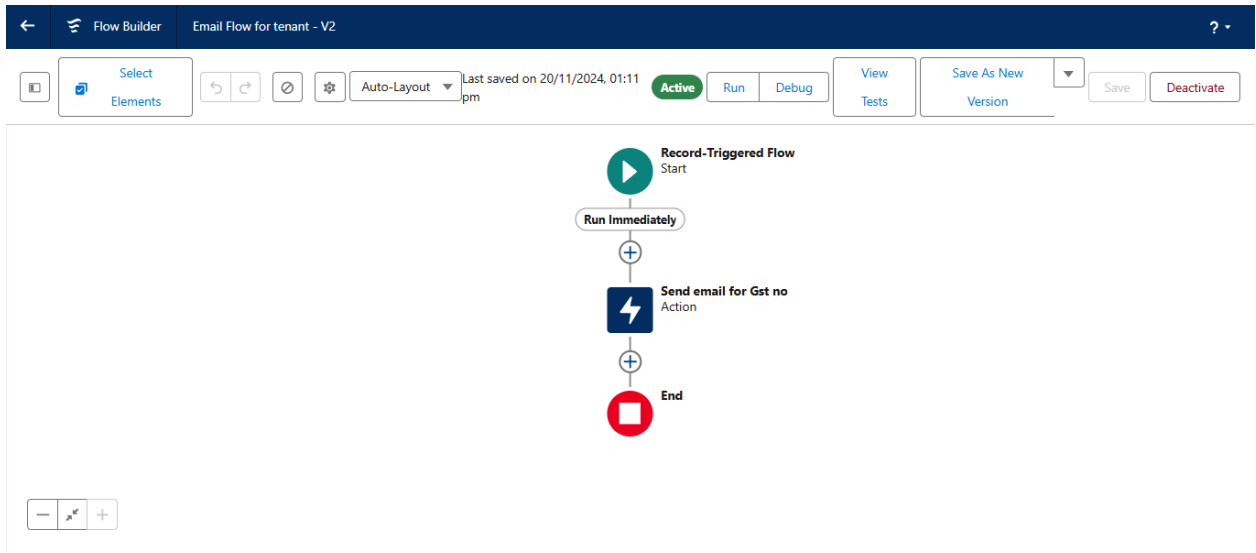
1. **Platform Utilization:** Salesforce is selected for its ability to streamline workflows, automate processes, and provide actionable insights.
2. **Process Overview:**
 - **Object Creation:**
 - Tendent Issue, Tendent Denied, Customer, and Lease Management objects were created to manage tenant and lease operations effectively.
 - **Field and Relationship Setup:**
 - Essential fields and relationships were established on Tendent Issue, Lease Tracking, and Tendent objects.
 - **Tabs and Lightning App:**
 - Tabs were created for navigation, and a Lightning app was built for an intuitive interface.
3. **Automation Features:**
 - Record-triggered flows automate tenant-related actions.
 - Scheduled flows handle periodic lease management tasks.
 - Apex triggers and Synchronization Apex ensure smooth data handling and integration.
4. **Analytics:**
 - Comprehensive reports and dashboards provide a clear view of tenant issues, lease statuses, and customer interactions.
5. **Visual Documentation:**

Screenshots of the following were included to document and present the process:

 - Workflow setups for flows and triggers.
 - Object configurations and fields.
 - Final dashboard and report outputs.
 - User interface created in the Lightning app.

This detailed implementation, with added visuals, enhances understanding and demonstrates the Salesforce solution's effectiveness for managing mall operations

SCREENSHOTS



The screenshot shows the Salesforce Setup page for the 'Tenant' object. The 'Fields & Relationships' section is active, displaying a table of 13 fields. The table is sorted by Field Label.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address_c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
Date of Reg	Date_of_Reg__c	Date		
Email	Email__c	Email		
GST No	GST_No__c	Text(15)		
Last Modified By	LastModifiedById	Lookup(User)		

SmartMail

Leases Tracking

Tenant Issues

Tenants

Analytics

Report Builder

Dashboards

December Dashboard

+ Widget

Filter

Save

Done

Tenant Details

Tenant: Tenant Name

ABC Pvt. Ltd.

Apex Engineering

Blue Sky Traders

Elite Enterprises

Horizon Systems

John Doe Enterprises

Nova Retailers

View Report (Tenant Details)

Issue Report

Tenant: Tenant Name

Tenant Issue: Issues

Properties

This dashboard is owned by Akshaya Sri S

View Dashboard As

☒ Me

☐ Another person

☐ The dashboard viewer

☐ Let dashboard viewers choose whom they view the dashboard as

Dashboard Grid Size

☒ 12 columns (recommended)

☐ 9 columns

Cancel

Save

Flow Builder

schedule flow on lease tracking - V1

?

Select Elements

Auto-Layout

Last saved on 20/11/2024, 12:26 pm

Active

Run

Debug

Save As New Version

Save

Deactivate


Mon, 02-Dec-2024, 11:30:00 am, Weekly

Start

Create task

Create Records

End



Search...

★

+

🔒

?

⚙️

🔔12

👤

SmartMallLeases Tracking ▾Tenant Issues ▾Tenants ▾Analytics ▾Issue Report ▾December Dashboard ▾

Dashboard

December Dashboard

As of 21-Nov-2024, 7:39 pm Viewing as Akshaya Sri S

RefreshEditSubscribe ▾

Tenant Details

Tenant: Tenant Name ↑

ABC Pvt. Ltd.

Apex Engineering

Blue Sky Traders

Elite Enterprises


Horizon Systems

John Doe Enterprises

Nova Retailers

View Report (Tenant Details)

Issue Report



Search...

★

+

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?

⚙️

🔔12

👤

SmartMallLeases Tracking ▾Tenant Issues ▾Tenants ▾Analytics ▾Issue Report ▾December Dashboard ▾

Issue Report

Tenant: Tenant Name ↑Tenant Issue: Issues

ABC Pvt. Ltd.ISS-0002

Apex EngineeringISS-0006

Blue Sky TradersISS-0004

Elite EnterprisesISS-0010

Horizon SystemsISS-0008

John Doe EnterprisesISS-0001

Nova RetailersISS-0009

View Report (Issue Report)

lease report

Tenant: Ten...Lease Tracking: Lease...Amou...Remal...

ABC Pvt. Ltd.TT - 000002300.00kred
