

A CRM APPLICATION TO MANAGE THE MALL

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1. Project Overview:

This project involves the development of a Customer Relationship Management (CRM) application tailored for mall management, leveraging the Salesforce platform for its robust features and scalability. The application is designed to manage tenants, leases, and issue tracking efficiently. It includes creating custom objects such as Tenant, Lease Tracking, and Tenant Issues, along with corresponding fields, relationships, and custom tabs.

A Lightning App will integrate these components for seamless navigation.

Automation is implemented using flows, including record-triggered and scheduled flows, while Apex triggers handle advanced logic like email notifications for unpaid rents and validation for PAN card entries. Asynchronous Apex is utilized for scheduled tasks, and detailed reporting and dashboards are provided for lease management, tenant issues, and overall tenant data. This comprehensive solution aims to streamline mall operations and enhance tenant management.

2. Objectives:

The primary objective of this project is to design and implement a robust CRM application using the Salesforce platform to streamline mall management operations. The system aims to efficiently manage tenant information, lease agreements, and tenant issue tracking while providing actionable insights through reports and dashboards. By creating custom objects like Tenant, Lease Tracking, and Tenant Issues, the application ensures that all critical data points

are captured and organized. The integration of custom tabs and a Lightning App allows for intuitive navigation and centralized access to relevant information. This application enhances operational efficiency by automating key processes, such as sending email alerts for unpaid rents and validating tenant PAN card entries, ensuring accuracy and timely follow-ups.

Another key objective is to harness Salesforce's capabilities to deliver a data-driven approach to mall management. Through the creation of flows and Apex triggers, the application automates repetitive tasks, saving time and minimizing human errors. The use of asynchronous Apex ensures that scheduled processes run seamlessly without affecting system performance. Additionally, by generating comprehensive reports and dashboards, the application provides stakeholders with valuable insights into tenant performance, lease management, and issue resolution trends. Ultimately, this project seeks to enhance tenant satisfaction, reduce administrative overhead, and empower mall management with tools to make informed decisions

3. Salesforce key Features and Concepts Utilised:

✓ Custom Objects and Fields:

Custom objects like Tenant, Lease Tracking, and Tenant Issues are created to capture specific mall management data. These objects include tailored fields and relationships to ensure accurate and relevant information storage.

✓ **Lightning App Builder:**

A custom Lightning App is designed to provide a centralized and user-friendly interface for managing tenant data, lease agreements, and issue tracking within the Salesforce environment.

✓ **Automation with Flows:**

Record-triggered and scheduled flows are implemented to automate repetitive processes, such as generating alerts for lease renewals or tracking overdue rents, enhancing operational efficiency.

✓ **Apex Triggers and Asynchronous Apex:**

Advanced business logic is implemented using Apex triggers for tasks like sending email notifications for overdue payments and validating tenant data. Scheduled Apex jobs are utilized for time-based automated tasks.

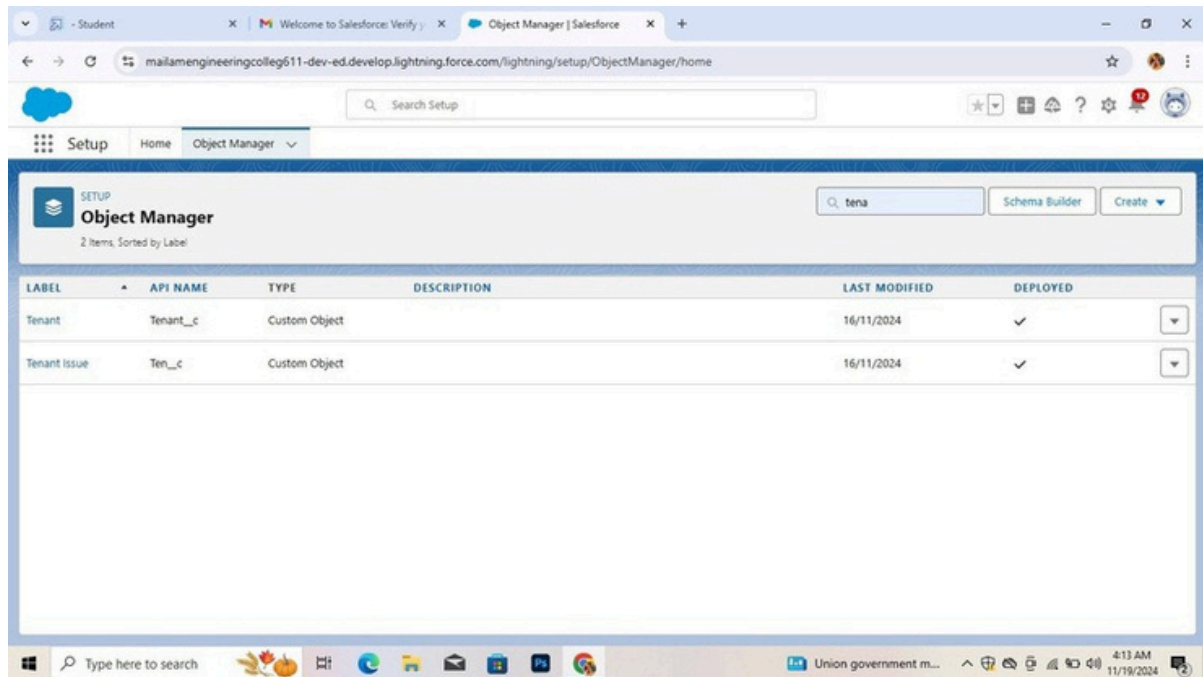
✓ **Reports and Dashboards:**

Custom reports and dashboards are created to provide actionable insights into lease management, tenant performance, and issue resolution trends, enabling data-driven decision-making.

4.Solution Design Steps for the Salesforce Mall Management CRM Application:

✓ Create Custom Objects:

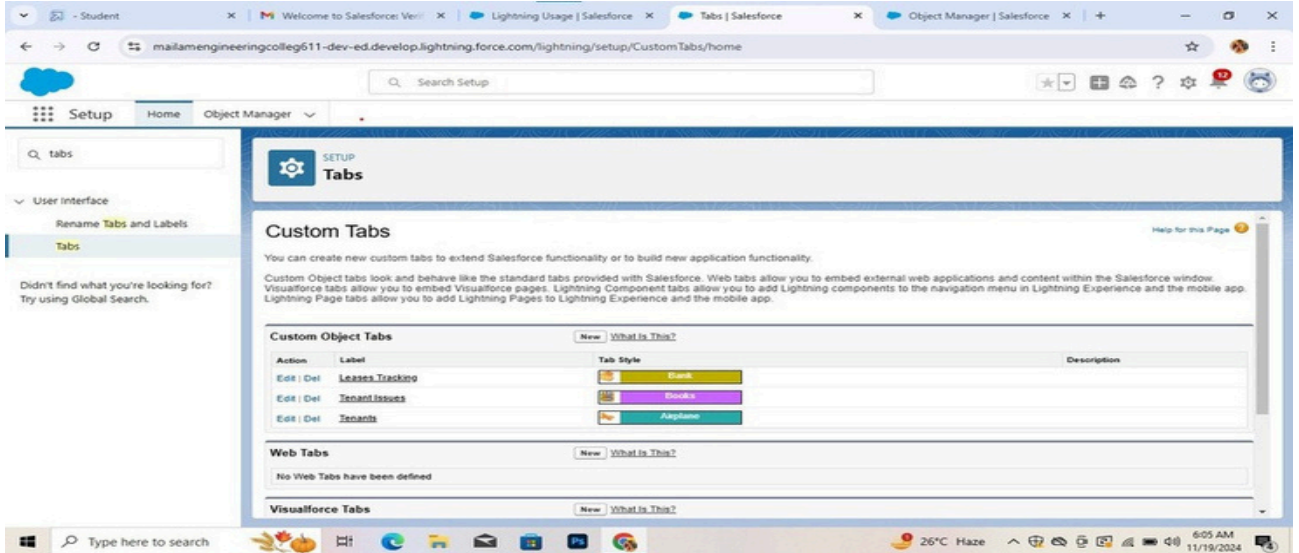
We should create a custom objects in salesforce, follow these details:



✓ Create a Tabs:

Tabs in a CRM (Customer Relationship Management) application for a mall typically serve as organized sections to manage various aspects of customer and business interactions. Here are common tab ideas.

Overview of key metrics, such as footfall, sales data, and tenant performance.

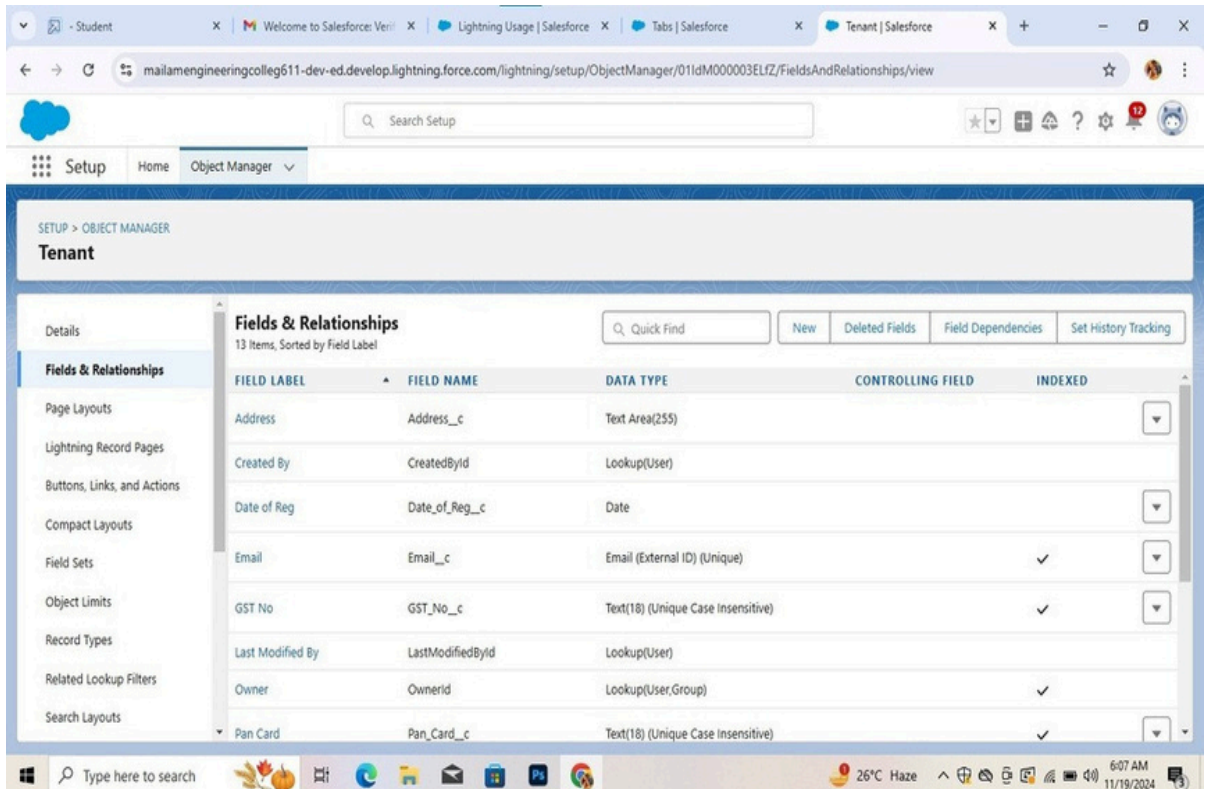


The screenshot shows the Salesforce Setup interface for Custom Tabs. The left sidebar includes a search bar and a navigation menu with 'User Interface' expanded, showing 'Rename Tabs and Labels' and 'Tabs'. The main content area is titled 'Custom Tabs' and includes a description: 'You can create new custom tabs to extend Salesforce functionality or to build new application functionality. Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.'

There are three sections for creating tabs:

- Custom Object Tabs:** Includes a 'New' button and a table with columns 'Action', 'Label', 'Tab Style', and 'Description'. The table lists three tabs: 'Leases Tracking' (Blank), 'Tenant Issues' (Blank), and 'Tenants' (AppPage).
- Web Tabs:** Includes a 'New' button and a message: 'No Web Tabs have been defined'.
- Visualforce Tabs:** Includes a 'New' button.

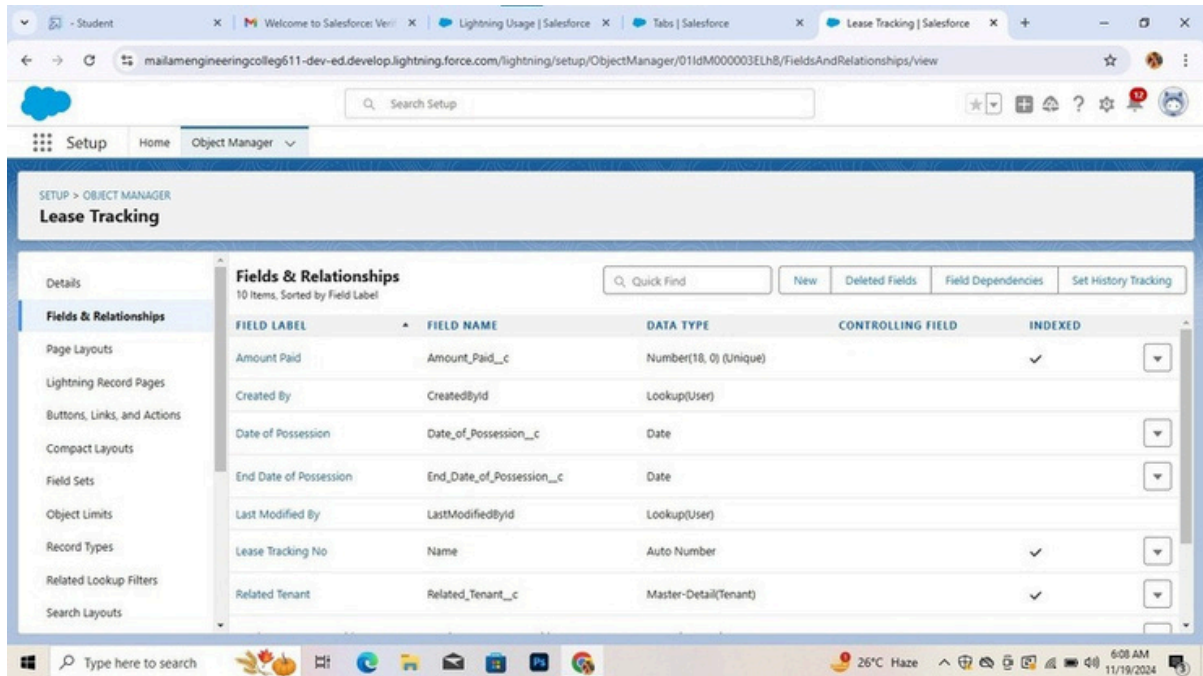
✓ Create fields on tenant object:



The screenshot shows the Salesforce Setup interface for the 'Tenant' object. The left sidebar includes a search bar and a navigation menu with 'Object Manager' expanded, showing '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 includes a 'Quick Find' search bar and buttons for 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking'. The table lists 13 items, 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 (External ID) (Unique)		✓
GST No	GST_No_c	Text(18) (Unique Case Insensitive)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Pan Card	Pan_Card_c	Text(18) (Unique Case Insensitive)		✓

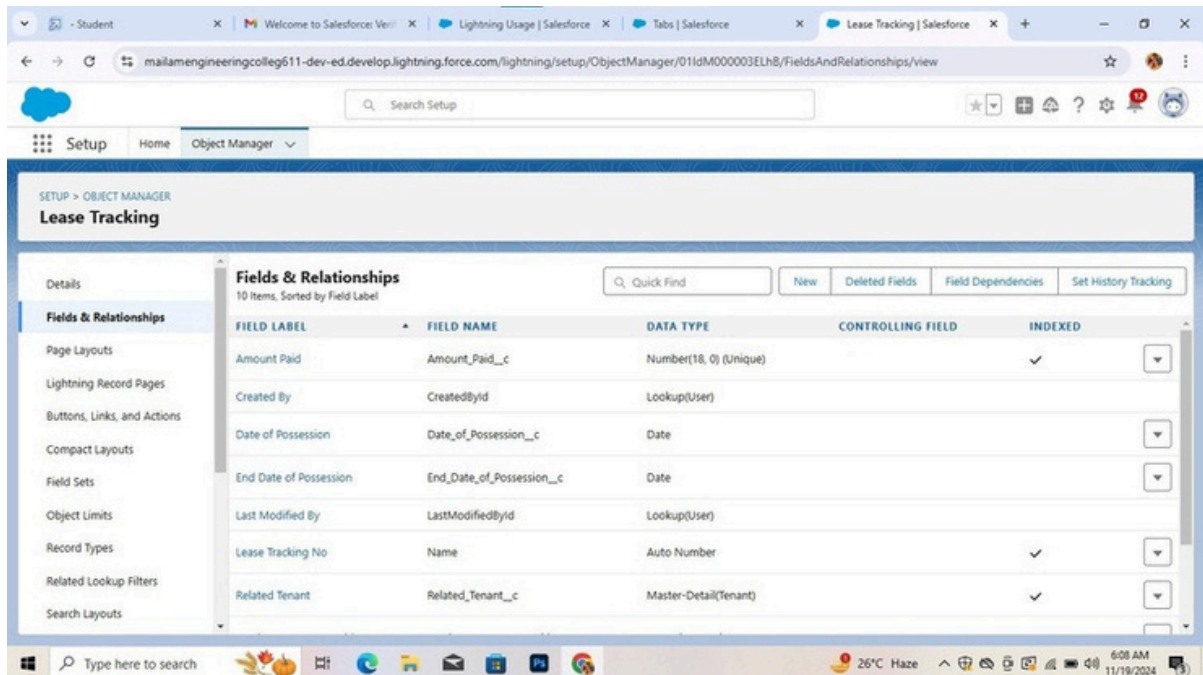
✓ Create fields on Lease tracking object:



The screenshot shows the Salesforce Setup interface for the 'Lease Tracking' object. The 'Fields & Relationships' section is active, displaying a list of 10 fields. The fields are sorted by Field Label. The table below represents the data shown in the screenshot:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount Paid	Amount_Paid__c	Number(18, 0) (Unique)		✓
Created By	CreatedById	Lookup(User)		
Date of Possession	Date_of_Possession__c	Date		
End Date of Possession	End_Date_of_Possession__c	Date		
Last Modified By	LastModifiedById	Lookup(User)		
Lease Tracking No	Name	Auto Number		✓
Related Tenant	Related_Tenant__c	Master-Detail(Tenant)		✓

✓ Create fields on tenant issues:



This screenshot is identical to the one above, showing the Salesforce Setup interface for the 'Lease Tracking' object. The 'Fields & Relationships' section is active, displaying a list of 10 fields. The fields are sorted by Field Label. The table below represents the data shown in the screenshot:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount Paid	Amount_Paid__c	Number(18, 0) (Unique)		✓
Created By	CreatedById	Lookup(User)		
Date of Possession	Date_of_Possession__c	Date		
End Date of Possession	End_Date_of_Possession__c	Date		
Last Modified By	LastModifiedById	Lookup(User)		
Lease Tracking No	Name	Auto Number		✓
Related Tenant	Related_Tenant__c	Master-Detail(Tenant)		✓

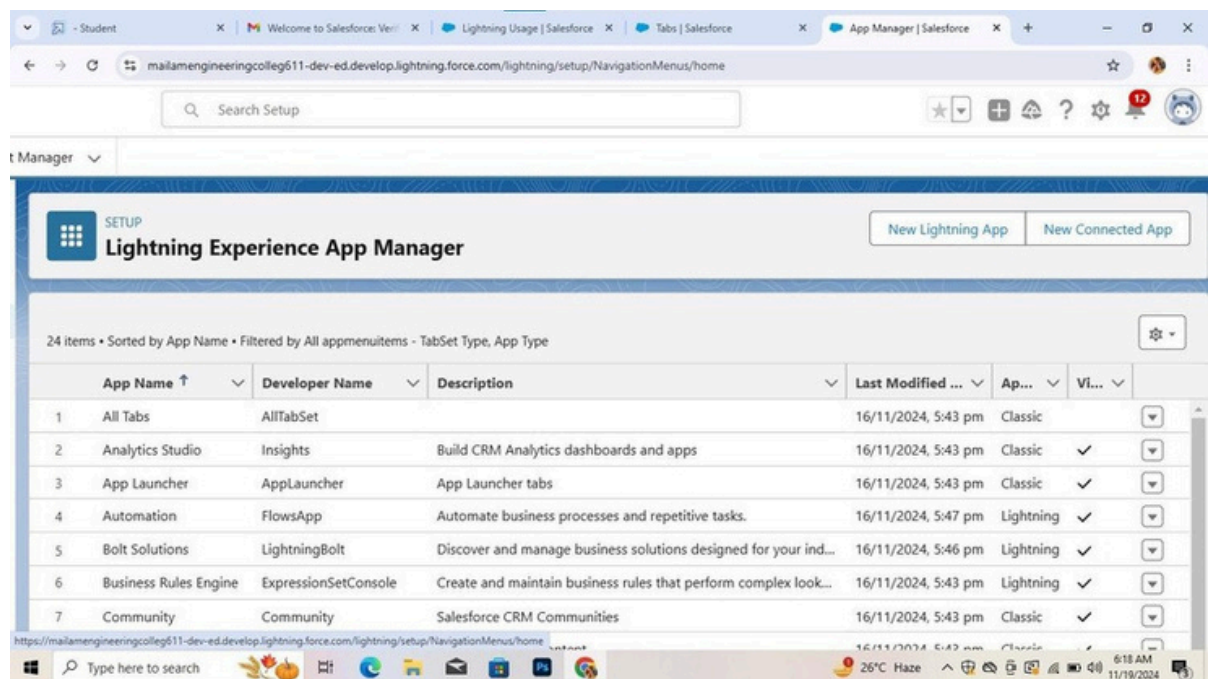
✓ Create a lightning app:

Create a Custom Lightning App that integrates the following components:

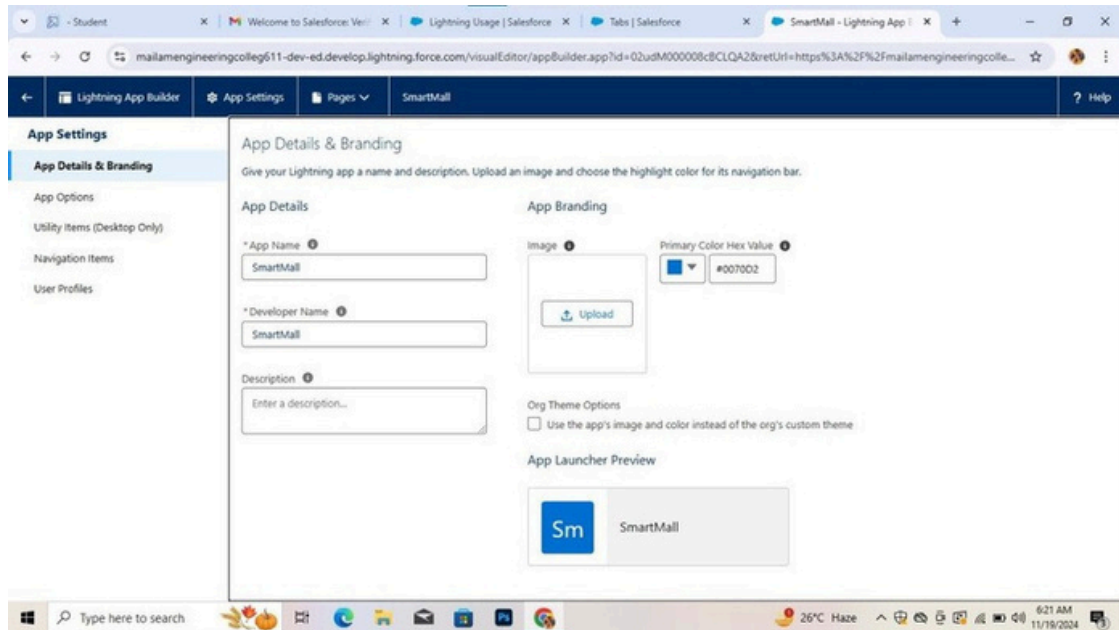
- o Opportunity Records
- o Automobile Information records
- o Invoices related to Opportunities

The app should include:

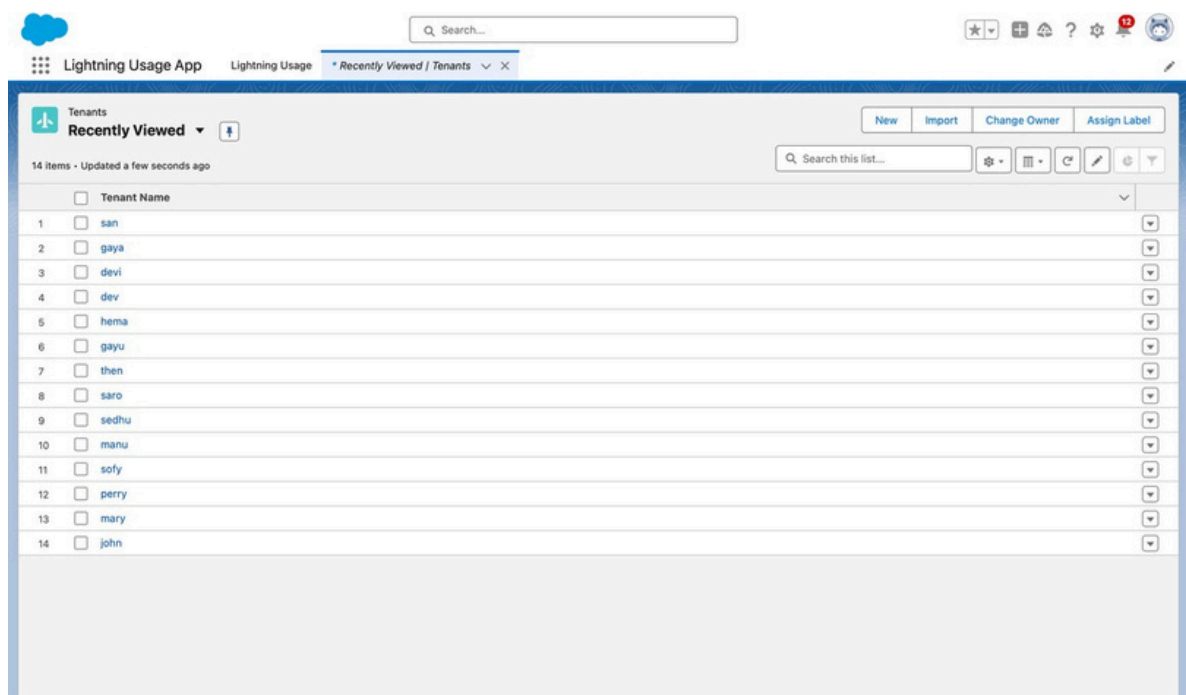
- o Navigation to all relevant objects (Opportunities, Automobiles, Invoices).
- o A dashboard to visualize Total Sales, Invoices due, opportunity stage.



App Name ↑	Developer Name	Description	Last Modified ...	Ap...	Vi...
1 All Tabs	AllTabSet		16/11/2024, 5:43 pm	Classic	
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	16/11/2024, 5:43 pm	Classic	✓
3 App Launcher	AppLauncher	App Launcher tabs	16/11/2024, 5:43 pm	Classic	✓
4 Automation	FlowsApp	Automate business processes and repetitive tasks.	16/11/2024, 5:47 pm	Lightning	✓
5 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your ind...	16/11/2024, 5:46 pm	Lightning	✓
6 Business Rules Engine	ExpressionSetConsole	Create and maintain business rules that perform complex look...	16/11/2024, 5:43 pm	Lightning	✓
7 Community	Community	Salesforce CRM Communities	16/11/2024, 5:43 pm	Classic	✓



✓ Inserting records in tenant object:



✓ Inserting records in lease tracking object:

Lightning Usage App Lightning Usage * Recently Viewed / Tenants X * Recently Viewed / Lease... X

Leases Tracking Recently Viewed 13 Items - Updated a few seconds ago

Search this list...

	<input type="checkbox"/> Lease Tracking No	
1	<input type="checkbox"/> TT - 000006	
2	<input type="checkbox"/> TT - 000010	
3	<input type="checkbox"/> TT - 000011	
4	<input type="checkbox"/> TT - 000012	
5	<input type="checkbox"/> TT - 000000	
6	<input type="checkbox"/> TT - 000004	
7	<input type="checkbox"/> TT - 000001	
8	<input type="checkbox"/> TT - 000009	
9	<input type="checkbox"/> TT - 000008	
10	<input type="checkbox"/> TT - 000007	
11	<input type="checkbox"/> TT - 000005	
12	<input type="checkbox"/> TT - 000003	
13	<input type="checkbox"/> TT - 000002	

✓ Inserting records in tenant issues object:

Lightning Usage App Lightning Usage * Recently Viewed / Tenants X * Recently Viewed / Lease... X * Recently Viewed / Tenant... X

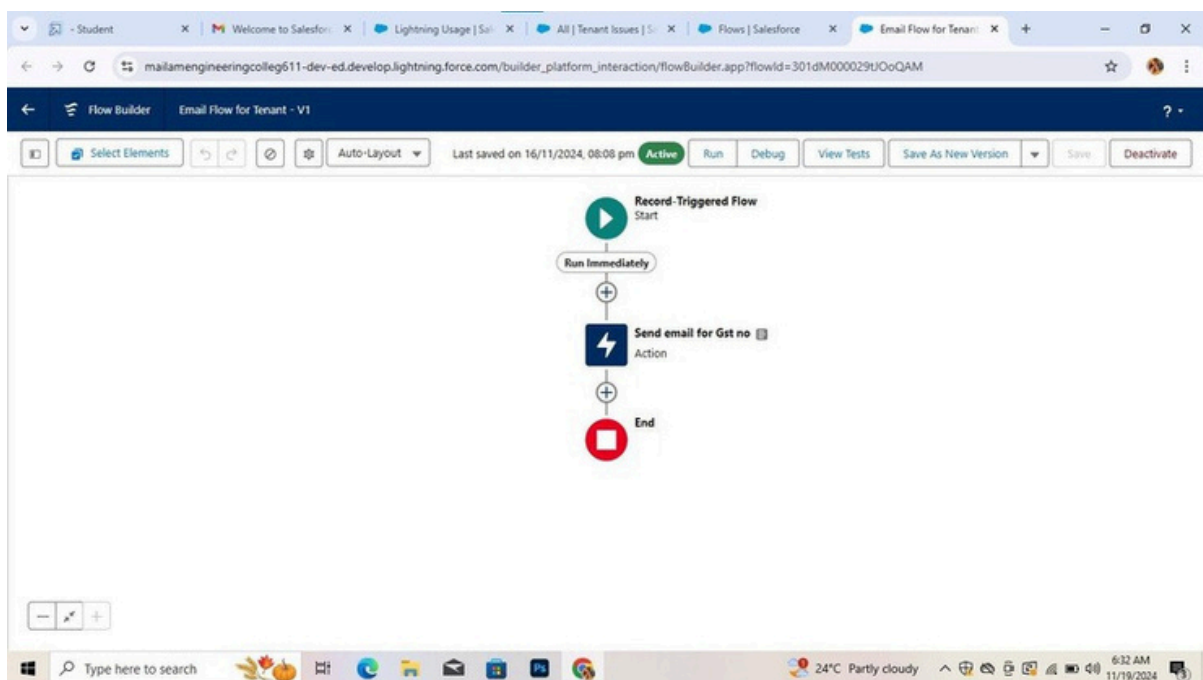
Tenant Issues Recently Viewed 10 Items - Updated a few seconds ago

Search this list...

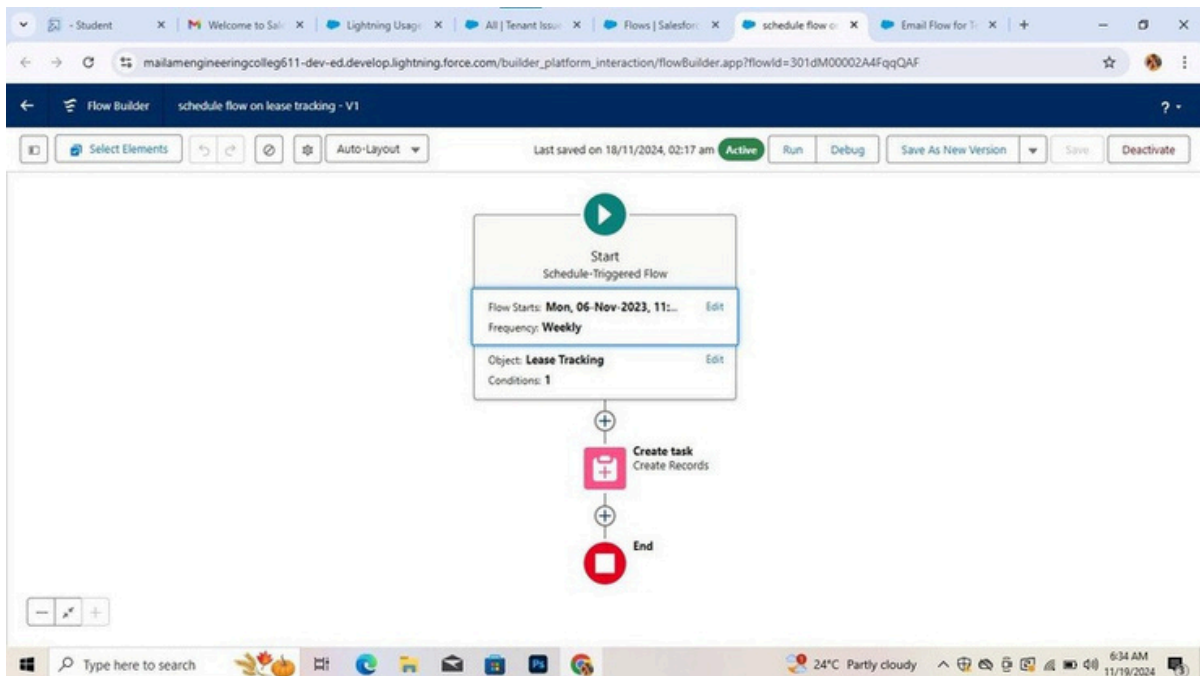
	<input type="checkbox"/> Issues	
1	<input type="checkbox"/> ISS-009	
2	<input type="checkbox"/> ISS-008	
3	<input type="checkbox"/> ISS-007	
4	<input type="checkbox"/> ISS-006	
5	<input type="checkbox"/> ISS-005	
6	<input type="checkbox"/> ISS-004	
7	<input type="checkbox"/> ISS-003	
8	<input type="checkbox"/> ISS-002	
9	<input type="checkbox"/> ISS-001	
10	<input type="checkbox"/> ISS-000	

✓ Create Flows:

Designing a CRM (Customer Relationship Management) application for a mall involves creating a set of comprehensive, user-centric workflows to optimize operations, enhance customer experience, and provide valuable insights to stakeholders. Below are detailed flows tailored to the key user groups: Mall Administrators, Store Managers, and Customers.



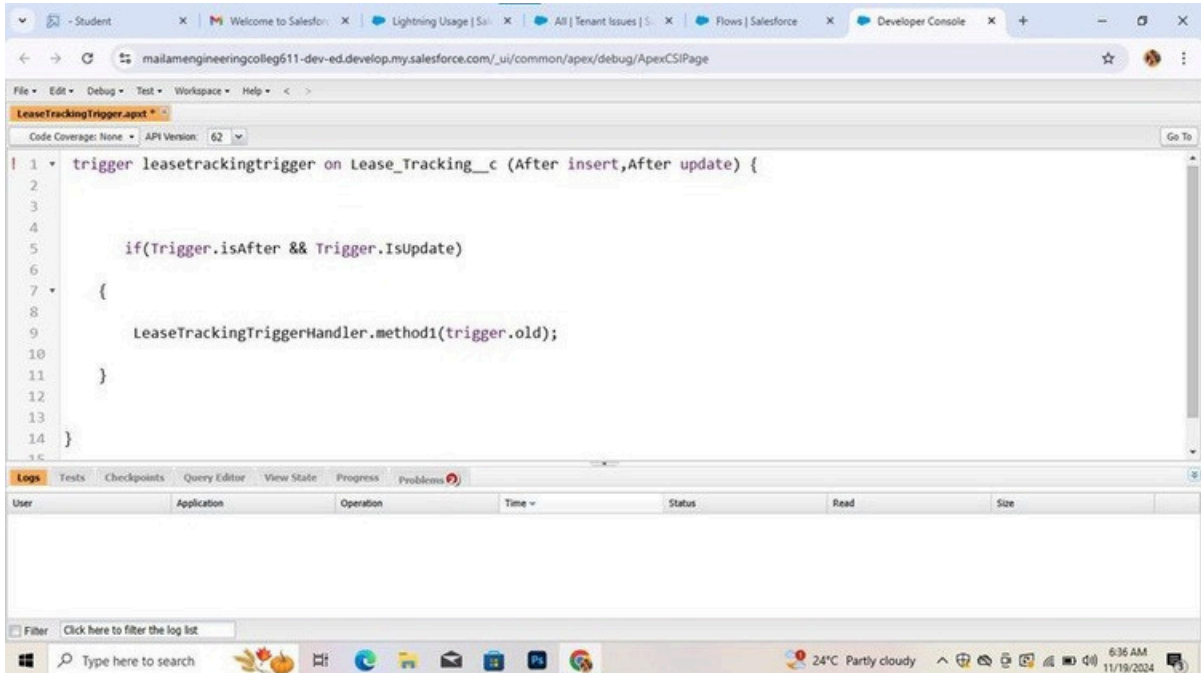
✓ Create a schedule flow on lease management object:



✓ Apex Triggers:

An Apex trigger is a set of instructions that execute when certain events occur on a Salesforce object (like when a record is created, updated, deleted, or restored).

✓ Lease tracking trigger:

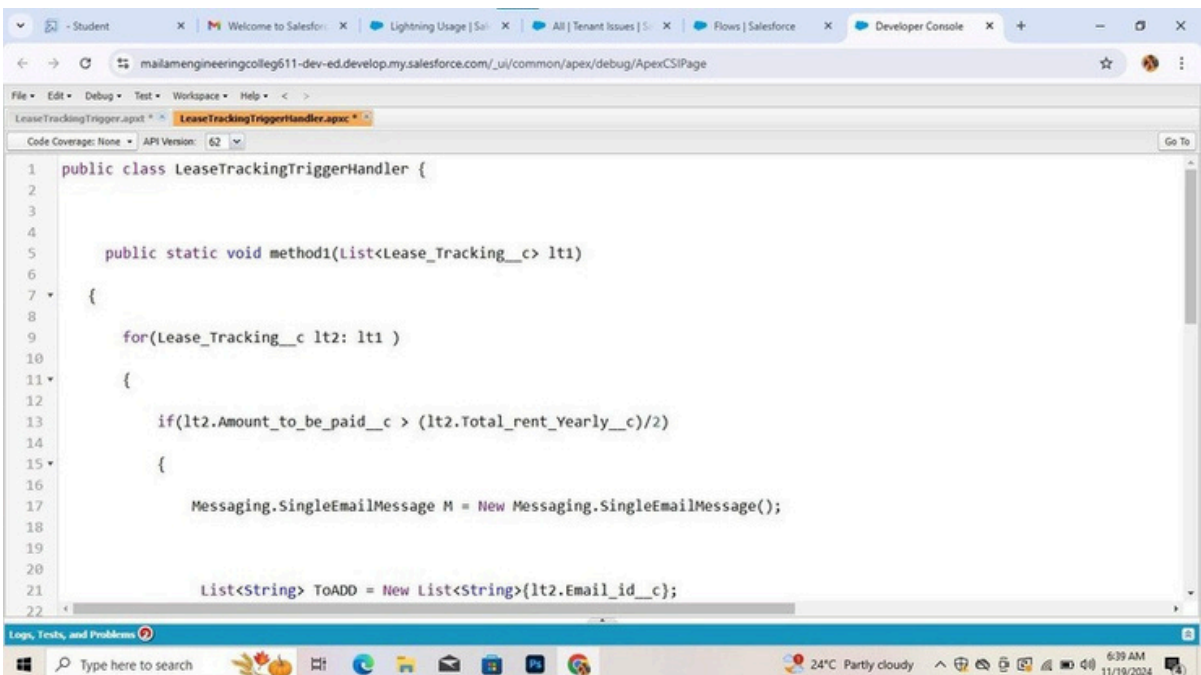


```

1  trigger leasetrackingtrigger on Lease_Tracking__c (After insert,After update) {
2
3
4
5      if(trigger.isAfter && Trigger.IsUpdate)
6      {
7
8          LeaseTrackingTriggerHandler.method1(trigger.old);
9
10     }
11
12 }
13
14
15

```

✓ Lease tracking trigger handler:



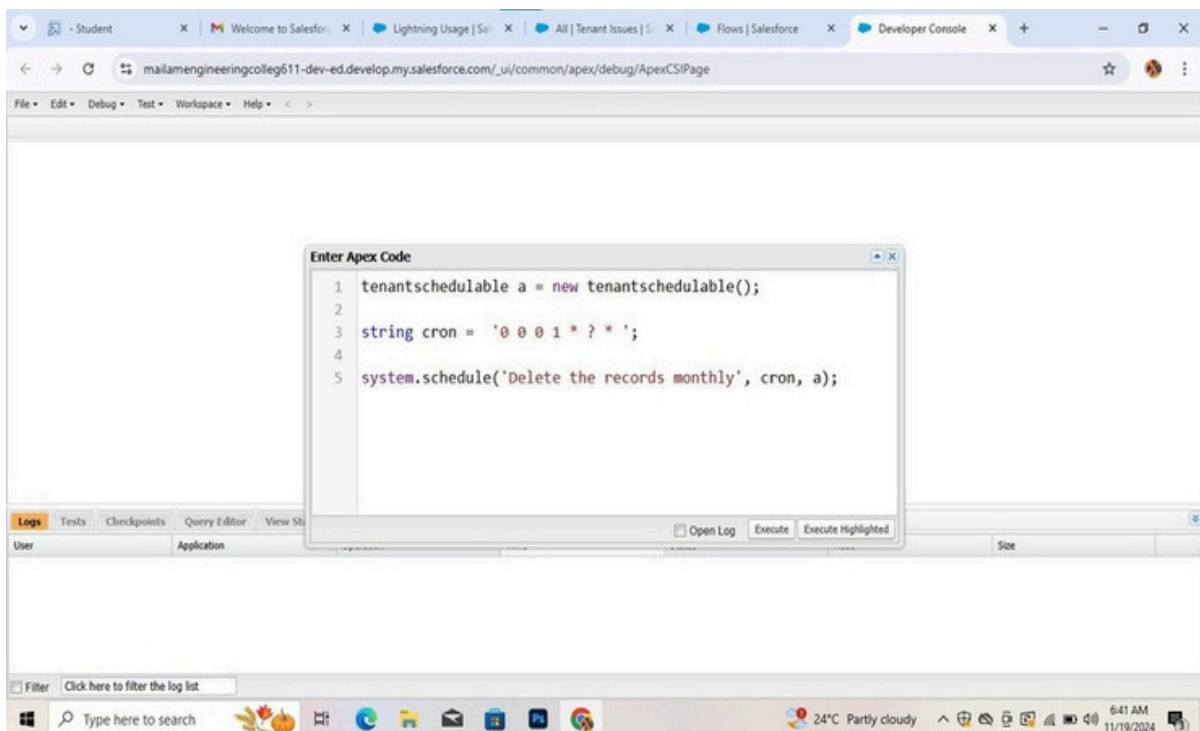
```

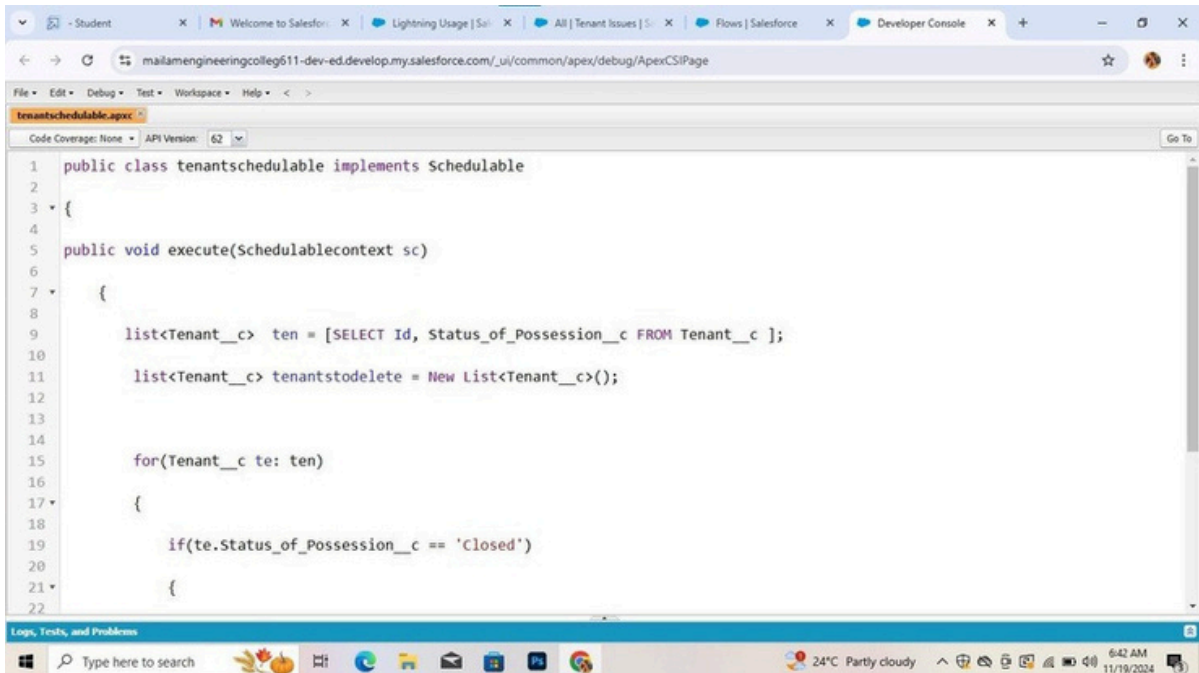
1  public class LeaseTrackingTriggerHandler {
2
3
4
5      public static void method1(List<Lease_Tracking__c> lt1)
6
7      {
8
9          for(Lease_Tracking__c lt2: lt1 )
10         {
11
12             if(lt2.Amount_to_be_paid__c > (lt2.Total_rent_Yearly__c)/2)
13             {
14
15                 Messaging.SingleEmailMessage M = new Messaging.SingleEmailMessage();
16
17
18                 List<String> ToADD = new List<String>{lt2.Email_id__c};
19
20
21
22

```

✓ Asynchronous apex:

Asynchronous Apex can be applied to CRM systems for a mall to handle operations that are long-running, resource-intensive, or time-dependent, such as sending notifications, processing tenant records, or updating analytics dashboards. Below are examples of Asynchronous Apex implementations, including Scheduled Apex for specific scenarios in a mall CRM application.





```

1 public class tenantschedulable implements Schedulable
2 {
3     {
4     public void execute(Schedulablecontext sc)
5     {
6         {
7             list<Tenant__c> ten = [SELECT Id, Status_of_Possession__c FROM Tenant__c ];
8             list<Tenant__c> tenantsdelete = New List<Tenant__c>();
9
10            for(Tenant__c te: ten)
11            {
12                if(te.Status_of_Possession__c == 'Closed')
13                {
14
15                }
16            }
17        }
18    }
19 }
20
21
22

```

✓ Reports:

Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics.

- **Create A Report of lease Management Records:**

Lease management records play a critical role in the administration of real estate properties, especially for commercial spaces like malls, office buildings, or residential complexes. A well-organized lease management system helps property managers track lease agreements, rental payments, terms, renewals, and compliance with lease conditions

Report: Tenants with Leases Tracking
lease report

Total Records: 10
Total Amount Paid: 3,82,000

Date of Reg	Tenant: Tenant Name	Lease Tracking: Lease Tracking No	Amount Paid	Date of Possession
15/11/2024 (2)	Thean	TT - 000012	43,000	25/11/2026
	Thean	TT - 000016	54,000	26/11/2026
Subtotal			97,000	
19/11/2024 (1)	Elango	TT - 000013	48,000	14/11/2025
Subtotal			48,000	
20/11/2024 (1)	Arun	TT - 000007	5,000	13/11/2026
Subtotal			5,000	
21/11/2024 (2)	Kavya	TT - 000014	57,000	05/11/2025
	Kavya	TT - 000002	40,000	17/07/2025
Subtotal			97,000	
23/11/2024 (2)	Lavanya	TT - 000009	36,000	27/11/2026
	Lavanya	TT - 000001	30,000	12/02/2026
Grand Total			3,82,000	

- **Create a report of Tenant issue:**

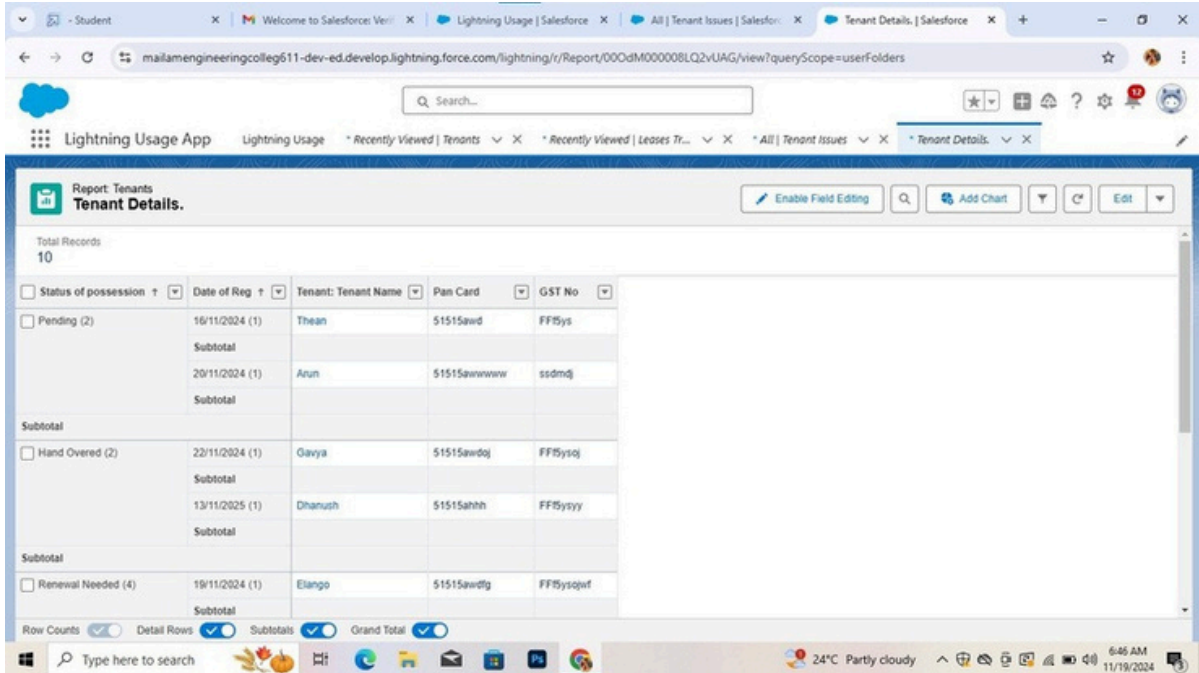
This report will outline the key components of lease management records, including the structure, data, and key performance indicators (KPIs) relevant to tracking lease agreements.

Report: Tenants with Tenant Issues
Issue Report

Total Records: 10

	Tenant: Tenant Name	Tenant Issue: Issues	Origin	Priority	Status
1	Kavya	TT - 000002	1.Phone	2.Medium	4.Working
2	Lavanya	TT - 000001	1.Phone	1.Low	1.Not contacted
3	Balaji	TT - 000010	1.Phone	1.Low	1.Not contacted
4	chandru	TT - 000009	1.Phone	1.Low	1.Not contacted
5	Monisha	TT - 000003	1.Phone	1.Low	1.Not contacted
6	Dhanush	TT - 000004	1.Phone	2.Medium	1.Not contacted
7	Arun	TT - 000005	1.Phone	2.Medium	4.Working
8	Elango	TT - 000006	1.Phone	2.Medium	3.In progress
9	Gavya	TT - 000007	1.Phone	2.Medium	4.Working
10	Thean	TT - 000008	1.Phone	1.Low	1.Not contacted

- **Create A Report on Tenant Records:**



Report: Tenants
Tenant Details.

Total Records: 10

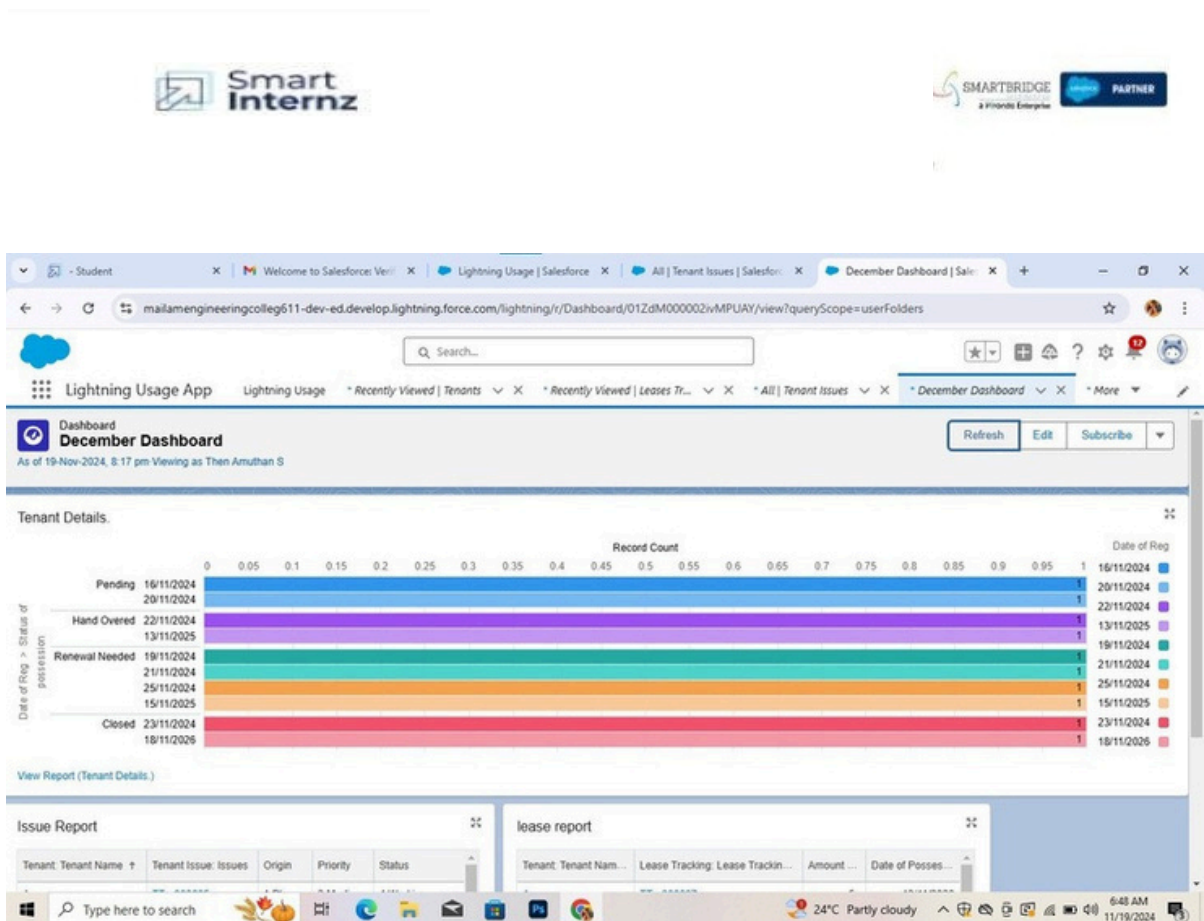
Status of possession	Date of Reg	Tenant: Tenant Name	Pan Card	GST No
Pending (2)	16/11/2024 (1)	Thean	S1515awd	FFB5ys
	Subtotal			
	20/11/2024 (1)	Anun	S1515awnnw	ssdmj
	Subtotal			
Hand Overed (2)	22/11/2024 (1)	Gavya	S1515awdaj	FFB5ysaj
	Subtotal			
	13/11/2025 (1)	Dhanush	S1515ahhh	FFB5ysyy
	Subtotal			
Renewal Needed (4)	19/11/2024 (1)	Elango	S1515awdaj	FFB5ysajw
	Subtotal			

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

✓ **Dashboard:**

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.

A set of steps designed to review, validate, and authorize tasks or transactions related to workforce management. This process ensures that actions like employee onboarding, promotions, leave requests, and payroll changes comply with organizational policies and are properly documented.



5. Testing and Vadlidation of CRM Application for the Mall project:

Testing and validation for the CRM application for a mall are crucial to ensure the system functions as expected and provides a seamless user experience for both customers and mall management. The process begins with functional testing to verify that all features, such as customer registration, profile management, loyalty programs, and marketing campaign execution, are working as intended. Usability testing follows, focusing on the ease of navigation, mobile responsiveness, and overall user-friendliness, ensuring that both customers and mall staff can interact with the system effortlessly. Performance testing is essential to evaluate how the CRM handles high traffic, especially during peak shopping times or promotions, and whether it can scale as the mall grows.

Security testing ensures that customer data is secure,

protecting sensitive information from unauthorized access and ensuring compliance with regulations like GDPR. Integration testing checks the seamless functioning of the CRM with other mall systems, such as POS, payment gateways, and tenant management software. Finally, user acceptance testing (UAT) involves real users to confirm the system meets business requirements and delivers the expected value. Throughout the process, any issues are logged, prioritized, and resolved before the final deployment. Post-launch, continuous monitoring and feedback collection are crucial for identifying and addressing any emerging issues, ensuring the CRM application continues to support the mall's operations efficiently.

6. Key Scenarios Addressed by Salesforce in the Implementation Project:

✓ Customer Data Management:

Scenario: Centralizing all customer data in one place to create a 360-degree view of each customer.

Implementation: Salesforce integrates various customer touchpoints (e.g., website, email, call centers) to aggregate customer data, ensuring that all interactions and transactions are captured and easily accessible to sales, marketing, and service teams.

✓ Lead and Opportunity Management:

Scenario: Managing and nurturing leads through the sales funnel to convert them into opportunities and eventually customers.

Implementation: Salesforce provides tools like Lead and Opportunity Management to track the lifecycle of potential customers, from initial interest to final sale. It allows for automatic lead assignment, status tracking, and personalized follow-up tasks.

✓ **Sales Forecasting and Reporting:**

Scenario: Generating accurate sales forecasts and performance reports for management and sales teams.

Implementation: Salesforce offers customizable dashboards, real-time analytics, and reporting tools to track sales performance, revenue, and forecasting. Users can visualize data in real time and generate reports to understand trends, close rates, and pipeline health.

✓ **Marketing Automation and Campaign Management:**

Scenario: Automating marketing tasks and creating personalized campaigns to engage customers and prospects.

Implementation: Salesforce Marketing Cloud enables the creation, automation, and tracking of marketing campaigns across multiple channels, including email, social media, and SMS. It allows businesses to send targeted messages based on customer behavior and preferences.

7. Conclusion:

In conclusion, implementing a CRM application for a mall provides a strategic advantage by centralizing customer data, streamlining operations, and enhancing customer engagement. The CRM system allows for efficient management of customer

relationships through personalized marketing, targeted promotions, loyalty programs, and responsive customer service. It empowers mall management with valuable insights into customer behavior, sales performance, and campaign effectiveness, enabling data-driven decision-making. Moreover, by integrating with other systems such as POS, tenant management, and inventory systems, the CRM application creates a seamless experience for both customers and mall operators. Ultimately, the CRM application not only boosts customer satisfaction and loyalty but also contributes to the mall's overall growth and operational efficiency, making it an indispensable tool for modern retail management.