

Project: A CRM Application to Manage the Mall

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1. Project Overview:

Using a CRM (Customer Relationship Management) application for managing a mall project can be highly beneficial. A CRM system allows you to store all project-related information in one place. This includes customer details, project timelines, budgets, and task progress. Having everything in one system makes it easier to access and manage data. CRMs provide analytics and reporting tools that give you insights into project performance. You can generate reports on various metrics, helping you make informed decisions.

2. Objectives:

Business Goals:

Optimize tenant mix and marketing strategies to attract more customers and boost sales. Provide excellent customer service and maintain strong tenant relationships

Specific Outcomes:

1. Higher Tenant Retention Rates

By maintaining strong relationships with tenants and addressing their needs promptly, you can reduce tenant turnover.

2. Increased Customer Footfall

Targeted marketing campaigns and personalized customer engagement can attract more visitors to the mall.

3. Optimized Space Utilization

Efficiently manage and allocate retail space to maximize revenue and minimize vacancies.

4. Improved Operational Efficiency

Streamlined processes and centralized data management lead to reduced costs and improved productivity.

3. Salesforce Key Features and Concepts Utilized:

- **Custom Objects:** Created objects for Customer, Vehicle, Appointment, Service, and Invoice.
- **Lookup Relationships:** Connected objects (e.g., Customer to Vehicle, Vehicle to Appointment) for relational data management.
- **Salesforce Flow:** Automations for appointment reminders, invoice generation, and status updates.
- **Validation Rules:** Ensuring correct data entry, such as valid appointment dates and VIN formats.
- **Reports and Dashboards:** For tracking performance, revenue, and service metrics.
- **Page Layouts and Record Types:** Customized layouts for different users (e.g., mechanics vs. administrative staff)

4.Detailed Steps to Solution Design:

1. To create an custom object

a. Tenant object:

Setup
Home
Object Manager

SETUP > OBJECT MANAGER

Tenant

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
Scoping Rules

Details

Description

API Name

Tenant__c

Custom

✓

Singular Label

Tenant

Plural Label

Tenants

Enable Reports

✓

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

Edit
Delete

b. Lease tracking object:

Setup
Home
Object Manager

SETUP > OBJECT MANAGER

Lease Tracking

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
Scoping Rules

Details

Description

API Name

Lease_Tracking__c

Custom

✓

Singular Label

Lease Tracking

Plural Label

Leases Tracking

Enable Reports

✓

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

Edit
Delete

c. Tenant issues:

The screenshot shows the Salesforce Setup interface. At the top, there's a search bar and navigation icons. The left sidebar shows the 'Setup' menu with 'Object Manager' selected. The main content area is titled 'Tenant Issue' and shows the 'Details' tab. The details include: Description, API Name (Tenant_Issue__c), Custom (checked), Singular Label (Tenant Issue), Plural Label (Tenant Issues), Enable Reports (checked), Track Activities, Track Field History, Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). There are 'Edit' and 'Delete' buttons in the top right corner.

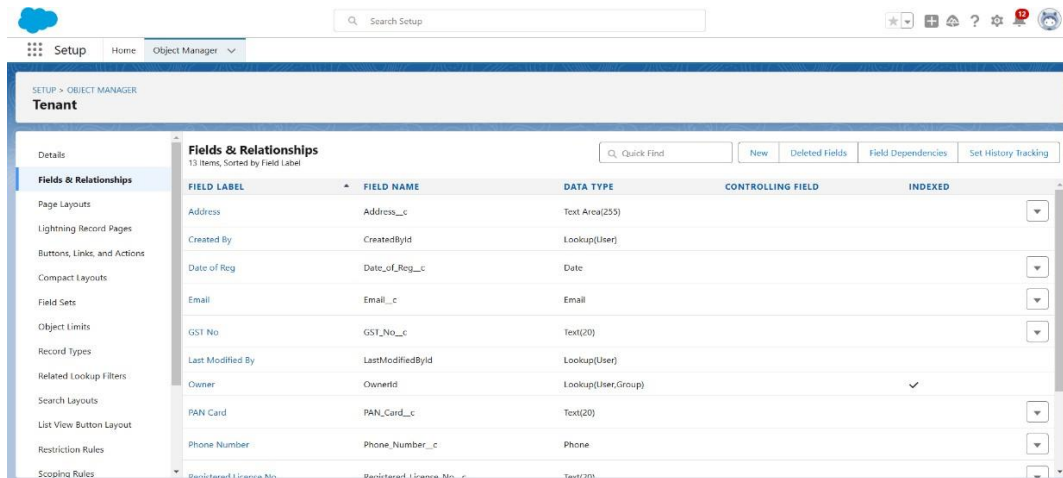
2.Tab:

Create a Custom tab:

The screenshot shows the Salesforce Setup interface for 'Custom Tabs'. The left sidebar shows the 'Setup' menu with 'Custom Tabs' selected. The main content area is titled 'Custom Tabs' and shows a table of 'Custom Object Tabs'. The table has columns for Action, Label, Tab Style, and Description. The rows are: Leases Tracking (Building Block), Tenant Issues (IP Phone), and Tenants (Building). Below the table, there are sections for 'Web Tabs', 'Visualforce Tabs', and 'Lightning Component Tabs', each with a 'New' button and a 'What Is This?' link. A 'Help for this Page' link is in the top right corner. A 'OneDrive - Personal' notification is visible in the bottom right corner.

3. Fields and Relationship:

a.Tenant:



Setup > OBJECT MANAGER

Tenant

Details

Fields & Relationships

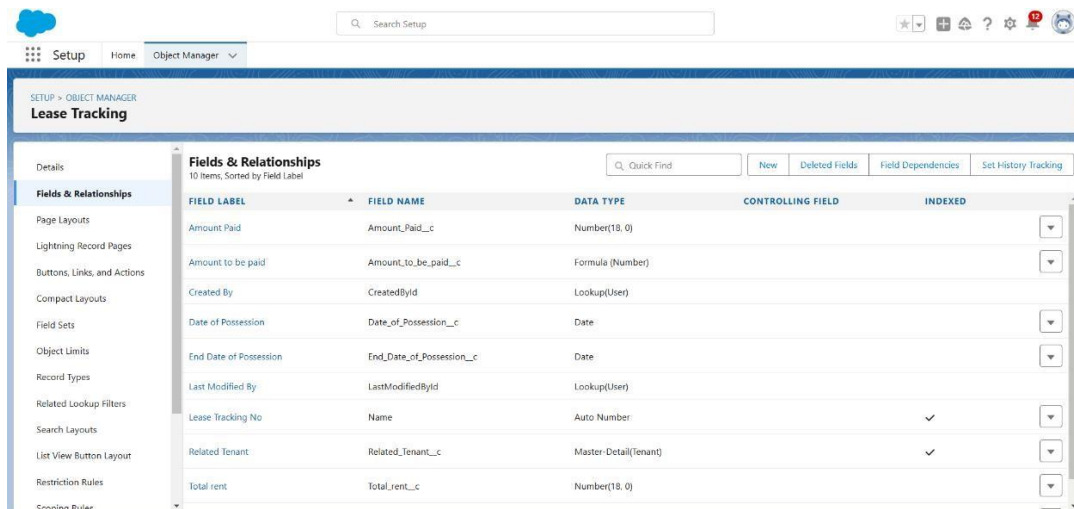
13 Items, Sorted by Field Label

Q, Quick Find

New Deleted Fields Field Dependencies Set History Tracking

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(20)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
PAN Card	PAN_Card__c	Text(20)		
Phone Number	Phone_Number__c	Phone		
Registered License No	Registered_License_No__c	Text(20)		

b.Lease tracking:



Setup > OBJECT MANAGER

Lease Tracking

Details

Fields & Relationships

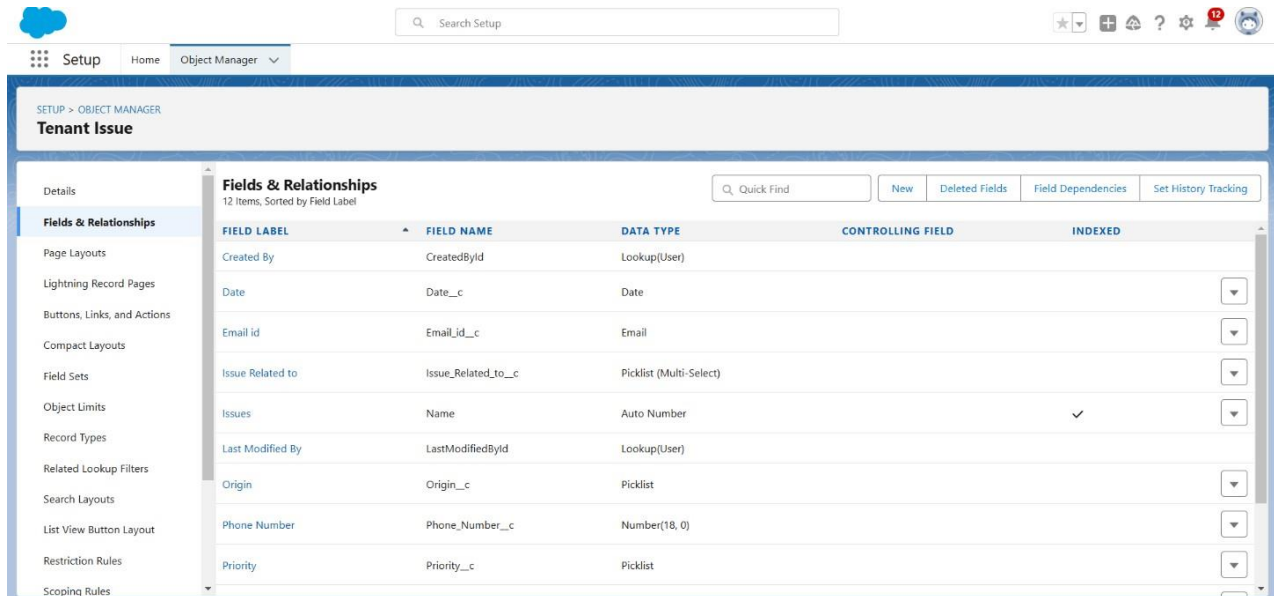
10 Items, Sorted by Field Label

Q, Quick Find

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount Paid	Amount_Paid__c	Number(18, 0)		
Amount to be paid	Amount_to_be_paid__c	Formula (Number)		
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)		✓
Total rent	Total_rent__c	Number(18, 0)		

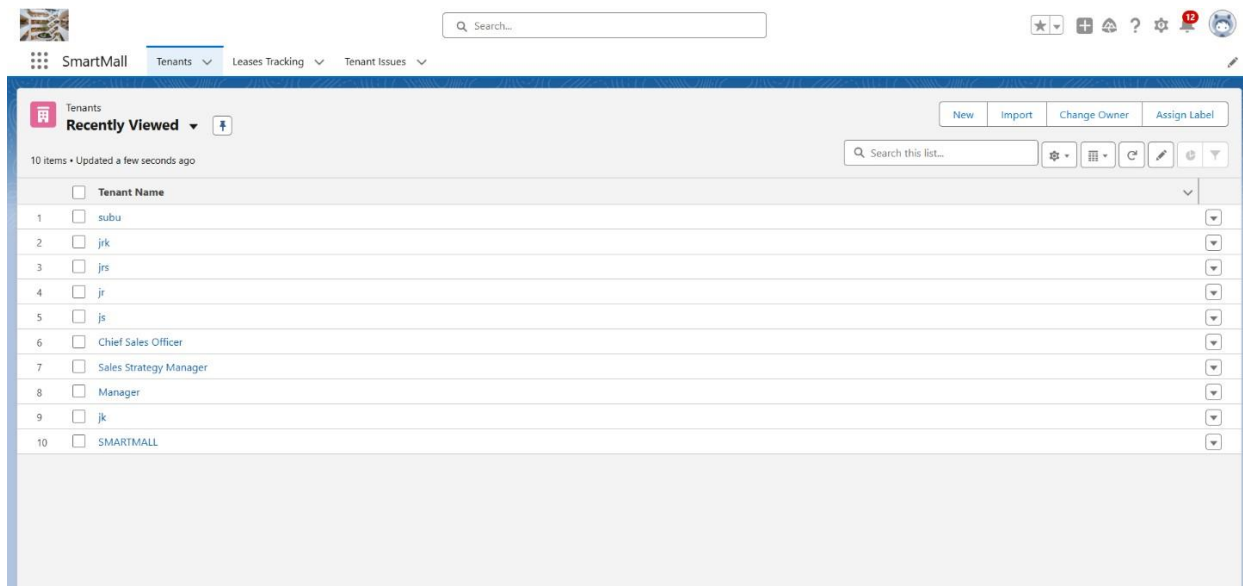
c.Tenant issues:



The screenshot shows the Salesforce Setup interface for the 'Tenant Issue' object. The left sidebar contains navigation links: Details, Fields & Relationships (selected), 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, and Scoping Rules. The main content area is titled 'Fields & Relationships' and shows 12 items sorted by Field Label. The table below lists the fields and their properties.


FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Date	Date__c	Date		
Email id	Email_id__c	Email		
Issue Related to	Issue_Related_to__c	Picklist (Multi-Select)		
Issues	Name	Auto Number		✓
Last Modified By	LastModifiedById	Lookup(User)		
Origin	Origin__c	Picklist		
Phone Number	Phone_Number__c	Number(18, 0)		
Priority	Priority__c	Picklist		

4.Lightning app builder:




The screenshot shows the Salesforce Lightning App Builder interface for the 'Tenants' object. The top navigation bar includes 'SmartMall', 'Tenants', 'Leases Tracking', and 'Tenant Issues'. The main content area is titled 'Tenants' and shows a list of 10 items. The table below lists the tenants and their names.

	Tenant Name
1	subu
2	jrk
3	jrs
4	jr
5	js
6	Chief Sales Officer
7	Sales Strategy Manager
8	Manager
9	jk
10	SMARTMALL


SmartMail

Tenants
Leases Tracking
Tenant Issues

★
+
🏠
?
⚙️
🔔
👤


Leases Tracking

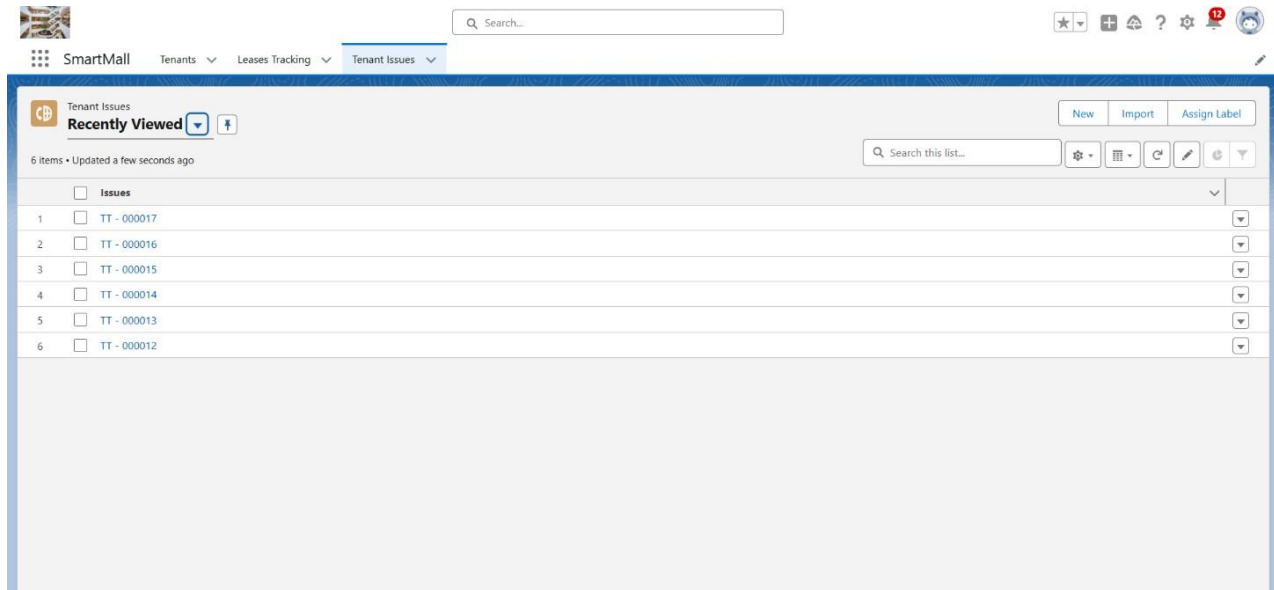
Recently Viewed
⌵
⚙️

5 items • Updated a few seconds ago

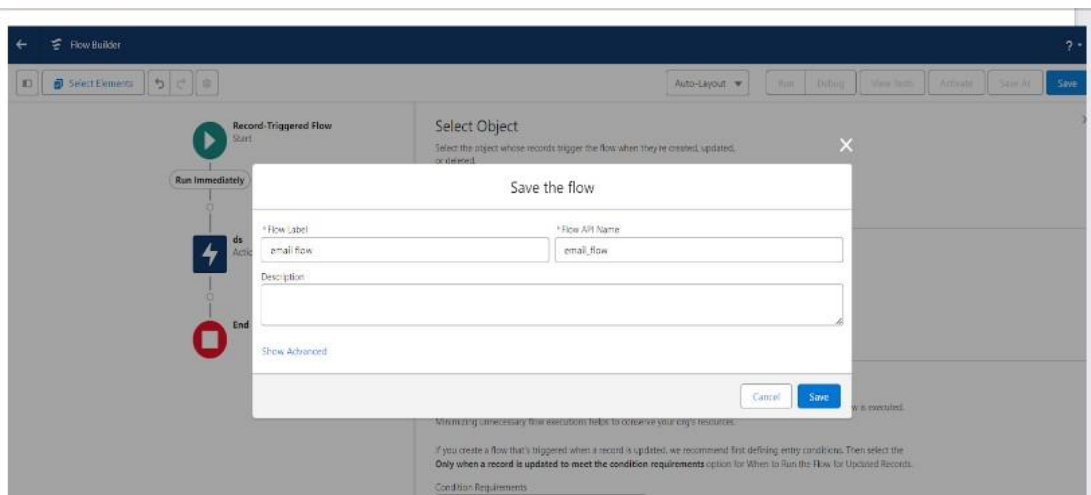
⚙️
📄
🔄
✎
📌
⌵

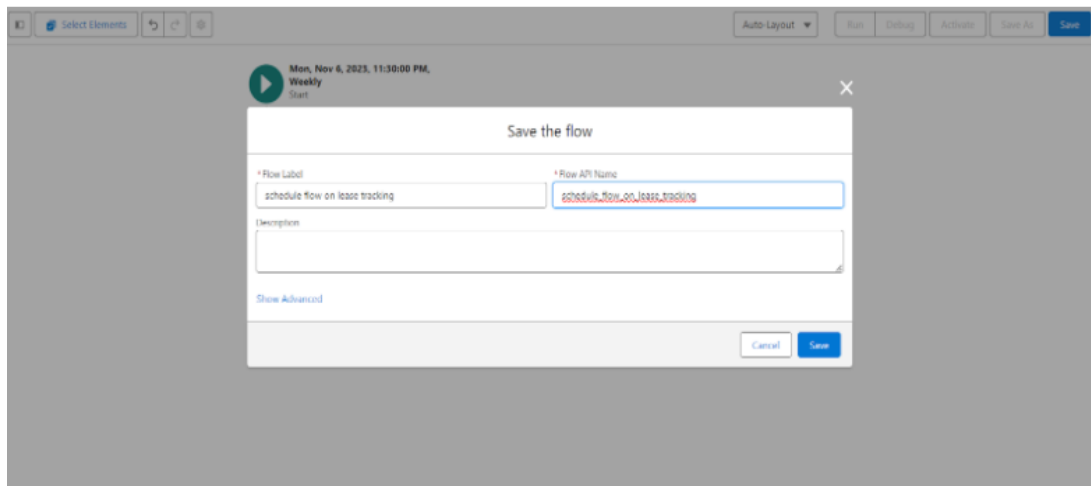
	<input type="checkbox"/> Lease Tracking No	
1	<input type="checkbox"/> TT - 000005	⌵
2	<input type="checkbox"/> TT - 000004	⌵
3	<input type="checkbox"/> TT - 000003	⌵
4	<input type="checkbox"/> TT - 000002	⌵
5	<input type="checkbox"/> TT - 000001	⌵

c.Tenant issues:



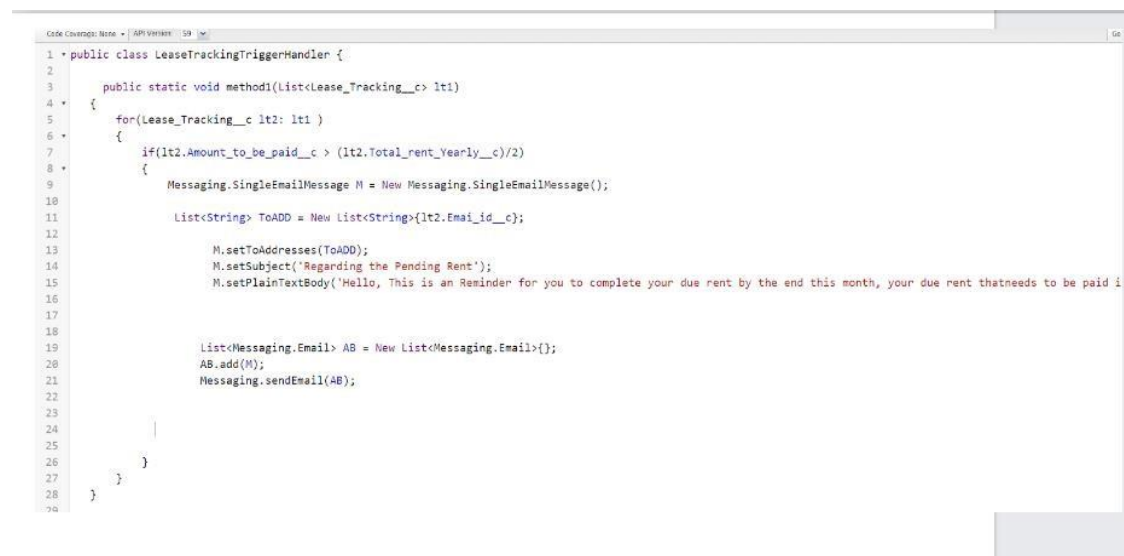
6.Create a flow:





5. Testing and Validation:

1.Apex Triggers:



```

1 public class TenantTriggerhandler {
2
3     public static void method1(List<Tenant__c> te)
4     {
5
6         for(Tenant__c tenant : te)
7         {
8             if(tenant.Pan_Card_no__c.length() > 10)
9             {
10                 tenant.addError('This Pan Card number is invalid, Please Enter Valid Pan Card number');
11             }
12         }
13     }
14 }
15 }

```

2.Asynchronous Apex:

Schedule apex:

```

Code Coverage: None API Version: 59
1 public class tenantschedulable implements Schedulable
2 {
3     public void execute(Schedulablecontext sc)
4     {
5         list<Tenant__c> ten = [SELECT Id, Status_of_Possession__c FROM Tenant__c ];
6         list<Tenant__c> tenantstodelete = New List<Tenant__c>();
7
8         for(Tenant__c te: ten)
9         {
10             if(te.Status_of_Possession__c == 'Closed')
11             {
12                 tenantstodelete.add(te);
13             }
14         }
15         Delete tenantstodelete;
16     }
17 }

```

Reports and Dashboards:

a. Lease management records:

REPORT ▼ New Tenants with Lease trackings Report Tenants with Lease trackings

Previewing a limited number of records. Run the report to see everything. Update Preview Automatically

Date/Ref	Amount to be paid	Date of Possession	Tenant: Tenant Name	remaining amount
11/09/2023 (1)	300,000.00	04/2024	pragati	yellow
Subtotal	300,000.00			
16/02/2024 (1)	300,000.00	2/06/2024	myself	yellow
	200,000.00	4/20/2024	nadeem	yellow
	1,000,000.00	3/9/2024	Nalu Ramesh Badge	blue
Subtotal	1,000,000.00			
12/12/2023 (1)	200,000.00	3/02/2024	sky	yellow
Subtotal	200,000.00			
12/4/2024 (1)	400,000.00	-	sai	yellow
Subtotal	400,000.00			
3/13/2024 (1)	200,000.00	2/06/2024	Dadu badge	yellow
Subtotal	200,000.00			
Total (7)	2,900,000.00			

b. Tenant issues records:

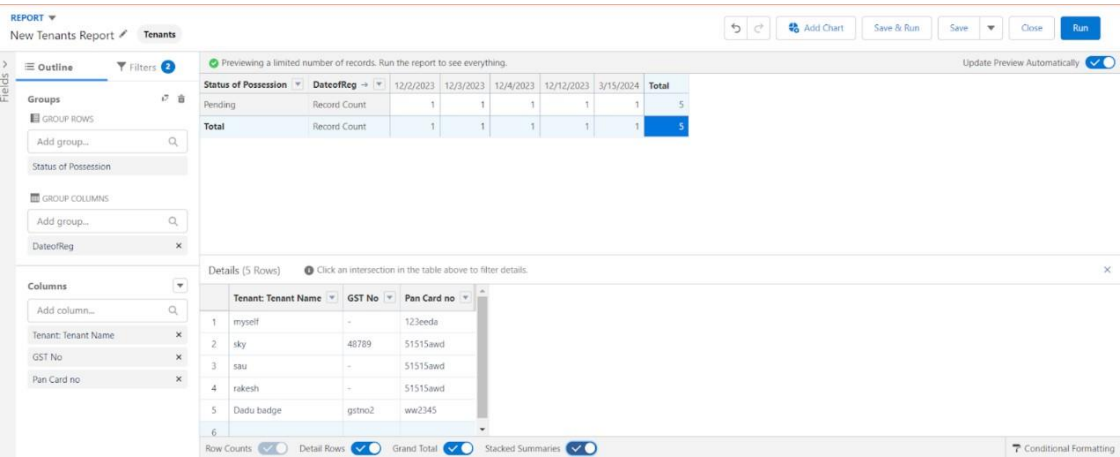
REPORT ▼ New Tenants with tenants Issues Report Tenants with tenants Issues

Previewing a limited number of records. Run the report to see everything. Update Preview Automatically

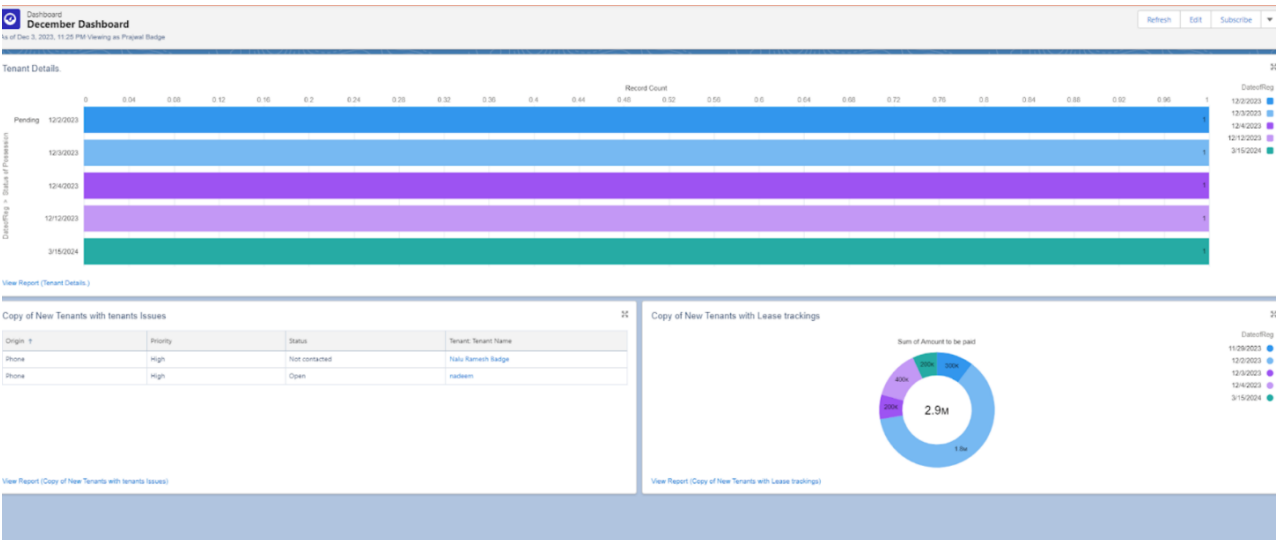
Date	Origin	Priority	Status	Tenant: Tenant Name
12/3/2023 (2)	Phone	High	Not contacted	Nalu Ramesh Badge
	Phone	High	Open	nadeem
Subtotal				
Total (7)				

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

c.Tenant records:



d. Dashboard:



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

a. Tenant Onboarding

Efficiently manage the process of bringing new tenants into the mall, from initial contact to finalizing lease agreements and moving in.

b. Lease Management

Keep track of lease terms, renewal dates, and rental payments. Automate reminders for lease expirations and upcoming payments.

c. Customer Feedback

Collect and analyze customer feedback to improve mall services and amenities. Use insights to implement changes that enhance the shopping experience.

d. Marketing Campaigns

Plan and execute targeted marketing campaigns to attract shoppers. Track the effectiveness of different strategies and adjust accordingly.

e. Event Management

Organize and manage events within the mall to increase foot traffic and engage the community. Coordinate logistics, promotions, and post-event analysis.

7. Conclusion:

Streamlined Management: Organize and oversee tasks, leases, and tenants effectively.

Enhanced Communication: Improve interactions among team members, tenants, and customers.

Data Centralization: Store all project-related information in a single, accessible location.

Performance Analytics: Utilize data-driven insights to optimize operations and marketing strategies.

Customer and Tenant Engagement: Maintain strong relationships and ensure high satisfaction rates.

Project link: <https://arunai-e9-dev-ed.develop.lightning.force.com/lightning/setup/SetupOneHome/home>