

A CRM APPLICATION TO MANAGE THE MALL

1. Project Overview:

The **CRM Application to Manage the Mall** is a comprehensive solution built on the Salesforce platform. It aims to streamline and enhance the management of commercial malls by providing features to optimize lease tracking, improve tenant interactions, and offer actionable insights for decision-making. This project utilizes Salesforce tools such as custom objects, fields, relationships, Lightning app, flows, Apex triggers, and reports to create an effective CRM application tailored for mall management.

1. Streamlined Tenant Management.
2. Enhanced Customer Engagement.
3. Data-Driven Decision Making.
4. Efficient Facility and Maintenance Management.
5. Advanced Marketing and Event Management.

2. Project Objectives:

1. Centralized Tenant Management

Develop a centralized CRM system to efficiently manage tenant information leases, and communications.

2. Automated Lease Tracking

Implement automated processes for lease tracking, including renewal reminders and payment notifications.

3. Enhanced Tenant Interaction

Provide tools for streamlined communication with tenants, addressing inquiries, and handling service requests.

4. Data-Driven Insights

Create reports and dashboards for actionable insights into mall performance, tenant trends, and occupancy rates.

5. Efficient Data Entry and Maintenance

Simplify data entry and record maintenance with user-friendly forms and batch processing capabilities.

Business Goals

1. Optimize Operational Efficiency

By automating routine tasks and consolidating tenant data, the CRM system reduces the time and effort needed to manage leases and tenant interactions.

2. Improve Tenant Retention

Enhance tenant satisfaction through timely communication, streamlined services, and proactive lease renewal processes.

3. Enhance Decision-Making Capabilities

Use real-time reports and dashboards to monitor mall performance and occupancy trends, supporting strategic decisions that align with business goals.

4. Reduce Operational Costs

By minimizing manual processes, the CRM system lowers the cost of managing leases and tenant relationships, leading to better resource allocation.

Specific Outcomes

1. Custom Objects and Fields for Tenant and Lease Management

Detailed data structures capturing tenant details, lease terms, and service records, allowing mall administrators to maintain organized, accessible records.

2. Automated Lease Renewal Reminders

System-generated reminders for lease renewals, helping management avoid revenue loss due to missed renewals and ensuring proactive communication with tenants.

3. Tenant Interaction Logs and Communication History:

A centralized log for tracking tenant inquiries and service requests, enabling personalized responses and improved tenant satisfaction.

4. Reports on Occupancy Rates, Lease Expirations, and Revenue

Visual reports and dashboards provide insights into occupancy trends, upcoming lease expirations, and revenue metrics, supporting data-backed decisions.

5. Asynchronous Apex for Bulk Data Processing

Capability to handle bulk data operations, allowing large datasets to be processed in the background without impacting system performance.

6. Dashboards for Management Visibility

Real-time dashboards display key metrics at a glance, providing mall management with a high level view of occupancy, tenant retention, and performance.

3. Salesforce Key Features and Concepts Utilized:

1. Custom Objects

Custom objects are created to represent entities like tenants, leases, maintenance requests, and services. These objects store relevant information, making it easy for mall managers to keep track of tenants and lease data in a structured way.

2. Custom Fields and Relationships

Custom fields capture essential details (e.g., lease start/end dates, tenant contact info), while relationships connect tenants with their leases and service requests. These relationships enable a comprehensive view of all related records.

3. Tabs

Tabs are set up for key custom objects (e.g., Tenants, Leases) to allow easy navigation within the CRM, helping users quickly access tenant records, lease details, and maintenance logs.

4. Lightning App Builder

A custom Lightning App is built to provide mall management with a user-friendly interface for managing tenants, leases, and maintenance. This interface improves accessibility and usability for day-to-day operations.

5. Salesforce Flow

Flows automate tasks like sending lease renewal reminders to tenants and creating follow-up tasks for mall management. This ensures consistent and timely communication, enhancing tenant relationships and reducing manual work.

6. Apex Triggers

Triggers are used to enforce business rules and automate record updates, such as automatically updating lease status based on renewal or expiration dates. This helps in maintaining data accuracy and ensuring business rules are consistently followed.

7. Asynchronous Apex (Future Methods, Batch Apex)

Asynchronous Apex is implemented for bulk data processing tasks, such as calculating lease revenue for multiple tenants. This ensures that the system remains responsive while handling large datasets.

8. Reports and Dashboards

Custom reports and dashboards are created to show metrics like occupancy rates, lease expirations, tenant feedback, and revenue analysis. These insights provide mall management with a clear overview of performance and support strategic decision-making.

9. Record Types and Page Layouts

Different record types and page layouts are used to distinguish between different types of leases (e.g., retail vs. office spaces) and their specific requirements. This customization provides tailored views and data for each lease type.

10. Validation Rules

Validation rules ensure that data such as lease dates, contact information, and payment status meet required formats and constraints, reducing data entry errors and enhancing record accuracy.

11. Security and Permissions (Profiles, Permission Sets, and Roles)

Specific permissions are set up for mall management, leasing agents, and maintenance staff, ensuring that each user group has access only to the data they need. This protects sensitive tenant information and maintains data security.

12. Email Templates and Notifications

Predefined email templates are used for lease renewal reminders, new tenant onboarding, and service request updates.

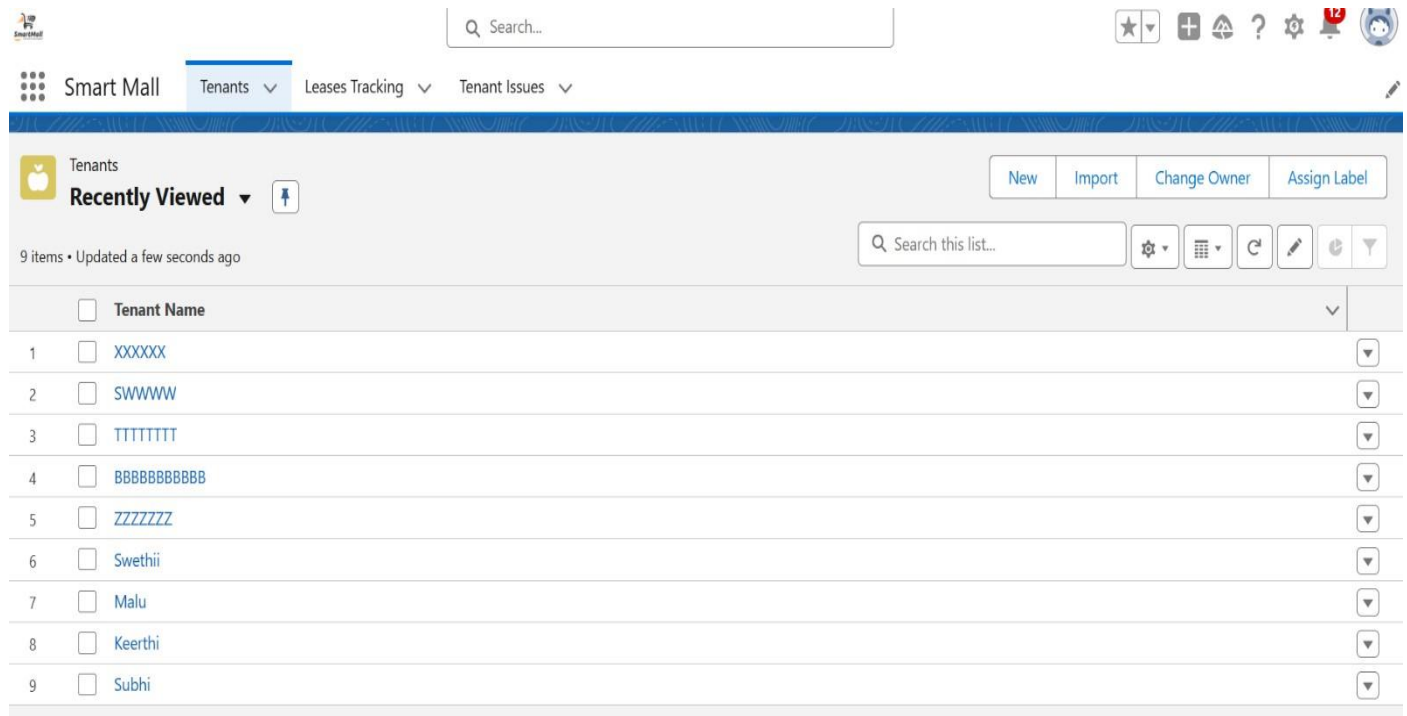
Automated notifications keep tenants and mall staff informed, enhancing engagement and responsiveness.

4. Detailed Steps to Solution Design:

Data Model:

Customer records with details on visits, purchases, and preferences.

Tenant records, including business type, contract information, and service requests.



The screenshot shows the 'Tenants' section of the Smart Mall application. It includes a search bar, navigation tabs, and a list of tenants with checkboxes and dropdown menus.

	<input type="checkbox"/> Tenant Name	
1	<input type="checkbox"/> XXXXXX	▼
2	<input type="checkbox"/> SWWWW	▼
3	<input type="checkbox"/> TTTTTTT	▼
4	<input type="checkbox"/> BBBBBBBBBB	▼
5	<input type="checkbox"/> ZZZZZZZ	▼
6	<input type="checkbox"/> Swethii	▼
7	<input type="checkbox"/> Malu	▼
8	<input type="checkbox"/> Keerthi	▼
9	<input type="checkbox"/> Subhi	▼



Search...



Smart Mall

Tenants ▾

Leases Tracking ▾

Tenant Issues ▾



Leases Tracking

Recently Viewed ▾



9 items • Updated a few seconds ago

	<input type="checkbox"/>	Lease Tracking No
1	<input type="checkbox"/>	TT - 000010
2	<input type="checkbox"/>	TT - 000009
3	<input type="checkbox"/>	TT - 000008
4	<input type="checkbox"/>	TT - 000007
5	<input type="checkbox"/>	TT - 000005
6	<input type="checkbox"/>	TT - 000004
7	<input type="checkbox"/>	TT - 000003
8	<input type="checkbox"/>	TT - 000002
9	<input type="checkbox"/>	TT - 000001



Search...



Smart Mall

Tenants ▾

Leases Tracking ▾

Tenant Issues ▾




Tenant Issues

Recently Viewed ▾



9 items • Updated a few seconds ago

	<input type="checkbox"/>	Issues
1	<input type="checkbox"/>	TT - 000001
2	<input type="checkbox"/>	TT - 000003
3	<input type="checkbox"/>	TT - 000002
4	<input type="checkbox"/>	TT - 000005
5	<input type="checkbox"/>	TT - 000004
6	<input type="checkbox"/>	TT - 000007
7	<input type="checkbox"/>	TT - 000009
8	<input type="checkbox"/>	TT - 000008
9	<input type="checkbox"/>	TT - 000010




Smart Mall

Tenants

Leases Tracking

Tenant Issues

* December Dashboard



Tenant

XXXXXX

Tenant Name

XXXXXX

Phone Number

9245667888

Address

FDJKJHGHGJGVJK

PAN Card

KGF23567

Date of Reg

11/06/2024

Email

sddghk@gmail.com

GST No

22SHTGHK


Registered License No

JK45679

Shop Act license No

JG54789

Owner



SUBHASREE B

User Interface Designs:

Dashboard for mall management to view customer and tenant analytics.

Tenant portal to view performance reports and update information.

Customer app interface for exclusive promotions and updates.



Search...



Smart Mall

Tenants

Leases Tracking

Tenant Issues

* December Dashboard

X



Dashboard

December Dashboard

As of 13-Nov-2024, 8:08 pm-Viewing as SUBHASREE B

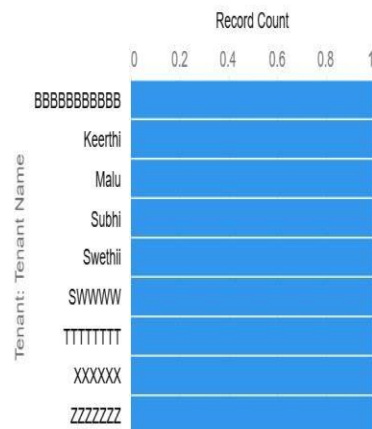
Refresh

Edit

Subscribe



Tenant Details

[View Report \(Tenant Details\)](#)

Issue Report

Tenant...	Address	D...	Email	GST No
a00dM00l	No.07 Church street, Chennai.	05/05	malu07@gm	22MMM MM07
a00dM00l	TDTFJHJMMVMNHG H	04/11	srtghgn04@	22RYTH GUJ04
a00dM00l	TREDFHJKHG	05/11	baetyhj@gm	22HTFU JKHVJ2
a00dM00l	TJHGFDXCHMJBNB	02/11	ryjhbmbv@	22TYFJ HGX23
a00dM00l	GJMHFDGNMDAGR	13/05	fdhikyt24@q	22HGJH

[View Report \(Issue Report\)](#)

lease report

Amou...	Dat...	Tenan...	Lease Tracking: Lea...	re...
12.00k	12/03/2	Malu	TT - 000003	remainin g amounts
15.00k	14/05/2	TTTTTT TT	TT - 000008	remainin g amounts
15.00k	26/05/2	BBBBB BBBBB B	TT - 000009	remainin g amounts
16.00k	11/03/2	Keerthi	TT - 000002	remainin g amounts

[View Report \(lease report\)](#)**Business Logic:**

Automate lead scoring to identify high-potential customers.

Enable segmentation of customers based on purchase history for personalized marketing.

5. Testing and Validation:

Unit Testing: Validate Apex classes and triggers for customer data handling, tenant communication, and automation workflows.

User Interface Testing: Ensure all user-facing components (customer portal, tenant dashboards) are functional and user-friendly.

Performance Testing: Confirm that the CRM can handle large volumes of customer data and tenant interactions without lag.

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

1. Tenant Management

- **Tenant Onboarding:**
 - Automate the onboarding process by capturing tenant details, lease agreements, and store requirements in Salesforce.
 - Use workflows to send notifications for incomplete forms, approvals, or lease contract signing.
- **Lease and Payment Tracking:**
 - Maintain a centralized repository of lease agreements with key details like terms, start/end dates, and payment schedules.
 - Automate reminders for upcoming renewals and overdue payments using Salesforce Workflow Rules or Process Builder.
- **Tenant Communication:**
 - Use Salesforce's email and messaging capabilities to communicate announcements, updates, or policies directly with tenants.
 - Track tenant queries or complaints using **Case Management** for faster resolution.

2. Customer Engagement

- **Personalized Promotions:**

- Leverage Salesforce Marketing Cloud to segment customers based on their shopping history, preferences, and loyalty status.
- Create targeted marketing campaigns, such as discounts or exclusive offers, and automate email or SMS delivery.

- **Feedback and Reviews:**

- Enable customers to submit feedback via web portals or mobile apps, which Salesforce captures as records.
- Use dashboards to analyze trends in feedback and improve customer service.

- **Loyalty Programs:**

- Implement a loyalty program using Salesforce to track points, rewards, and redemption activities.
- Send personalized rewards updates to customers based on their activity history.

3. Marketing Automation

- **Campaign Planning and Execution:**

- Use Salesforce Campaign Management to schedule and track mall-wide campaigns such as seasonal promotions or tenant-specific events.
- Collaborate with tenants by sharing campaign calendars and performance analytics.

- **Event Management:**

- Automate event registration workflows and track attendance using Salesforce Event Management tools.
- Integrate with Salesforce Communities to allow customers to RSVP or inquire about events directly.

- **Customer Journey Tracking:**

- Use Marketing Cloud's Journey Builder to create personalized customer journeys across email, SMS, and social media.

4. Facility and Maintenance Management

- **Issue Reporting and Tracking:**

- Enable tenants and staff to report maintenance issues via a self-service portal integrated with Salesforce.
- Automatically assign tasks to maintenance teams using **Service Cloud** with escalations for unresolved issues.

- **Preventive Maintenance:**

- Schedule periodic maintenance tasks using Salesforce Field Service to avoid disruptions.
- Track the completion of maintenance tasks and generate reports for management.

- **Asset Management:**

- Maintain an inventory of mall facilities (e.g., escalators, parking systems) with detailed maintenance logs.

5. Sales and Revenue Management

- **Revenue Tracking:**

- Use Salesforce to consolidate data on rents, parking fees, event sponsorships, and other revenue streams.
- Create dashboards to monitor monthly, quarterly, and yearly income trends.

- **Payment Management:**

- Integrate Salesforce with payment gateways for seamless rent collection and transaction tracking.
- Automate reminders and penalties for late payments.

- **Financial Forecasting:**
 - Use Salesforce Analytics to predict revenue trends and identify areas for financial improvement.

6. Advanced Analytics and Reporting

- **Real-Time Dashboards:**
 - Provide mall administrators with dashboards showing foot traffic, tenant sales performance, and customer engagement metrics.
 - Use Einstein Analytics for predictive insights, such as peak shopping times and campaign success rates.
- **Tenant Performance Analysis:**
 - Monitor individual tenant performance, including sales and customer feedback, to make informed decisions about tenant mix.
- **Customer Insights:**
 - Analyze customer demographics and behavior to optimize marketing strategies.

7. Security and Compliance

- **Data Security:**
 - Protect tenant and customer data with Salesforce's inbuilt encryption and role-based access controls.
 - Ensure that sensitive information is accessible only to authorized personnel.
- **Regulatory Compliance:**
 - Use Salesforce Shield to track and audit data usage, ensuring compliance with GDPR and other local data protection laws.

8. Omni-Channel Customer Support

- **Multi-Channel Support:**
 - Offer tenants and customers multiple communication channels, including email, phone, and chat, integrated through Salesforce Omni-Channel.
- **Service Case Management:**
 - Use Salesforce Service Cloud to track and resolve tenant and customer issues efficiently.
 - Assign cases to appropriate teams with SLAs to ensure timely resolution.

9. Scalability and Integration

- **Third-Party System Integration:**
 - Integrate Salesforce with systems like point-of-sale (POS) tools, tenant inventory management, and external marketing tools for seamless operations.
 - Use Salesforce AppExchange to add extensions for specific functionalities, like payment gateways or event management.
- **Scalable Architecture:**
 - Use Salesforce's cloud-based infrastructure to easily expand operations to multiple malls or tenant portfolios.

10. Mobile and Web Accessibility

- **Salesforce Mobile App:**
 - Allow mall managers, tenants, and customers to access relevant features on the go, such as lease updates, event RSVPs, or feedback submission.
- **Customer Portals:**
 - Provide a web-based portal for customers to check promotions, register for events, and track loyalty points.

7. Conclusion:

Summary of Achievements:

The CRM application for the mall will centralize customer and tenant data, enable personalized customer engagement, and provide mall management with insights for improved operational decisions.

The successful implementation of the CRM application for mall management is a transformative step towards enhancing operational efficiency, tenant satisfaction, and customer engagement.

By leveraging the robust features of Salesforce, this project addresses critical scenarios such as tenant management, personalized customer experiences, marketing automation, and real-time analytics.

The CRM will serve as a centralized platform, enabling seamless coordination between mall administrators, tenants, and customers. It ensures operational transparency, streamlines processes like lease management, and automates workflows such as marketing campaigns and maintenance tracking.

Furthermore, its scalability and integration capabilities prepare the mall for future growth, allowing the system to adapt to evolving business needs and industry trends.

Through advanced analytics, predictive insights, and a focus on data security, the CRM empowers stakeholders to make informed decisions, foster stronger tenant relationships, and deliver an exceptional shopping experience to customers.

By adopting this solution, the mall positions itself as a modern, customer-focused entity ready to meet the challenges of a competitive retail landscape.

This project is not just a technological upgrade but a strategic initiative that bridges the gap between operational goals and customer-centric services, ensuring long-term success and sustainability for the mall's ecosystem.