THE CRM APPLICATION FOR MALL MANAGEMENT

Project Objectives:

The Mall Management CRM Application built on the Salesforce platform aims to provide a comprehensive solution to improve the efficiency and management of commercial malls. The key objectives of this application include:

1. Streamlined Lease Tracking: Automate lease tracking processes to ensure timely updates and follow-ups on lease agreements, renewals, and payments.

2. Enhanced Tenant Interactions: Manage and maintain accurate tenant records, allowing easy access to important details such as lease terms, payments, and communication history.

3. Efficient Maintenance Management: Automate the management of maintenance requests and issues, ensuring tenants have a smooth experience with the mall's facilities.

4. Actionable Insights: Utilize data-driven insights to assist managers in making informed decisions about the mall's operations, finances, and tenant relations.

5. Scalability and Flexibility: Provide a customizable and scalable solution that grows with the mall's needs, including integration with other Salesforce services.

Core Functionalities:

1. Custom Objects:

Tenant Object: Stores key tenant details such as name, contact info, lease terms, and more.

Lease Tracking Object: Manages lease details, such as start and end dates, rental amounts, and payment schedules.

Tenant Issues Object: Tracks maintenance and tenant-reported issues, from reporting to resolution.

2. Custom Fields and Relationships:
Create fields for each object to store the necessary information, and establish relationships between objects (e.g., linking tenants to their lease records).

3. Automation:

Flows: Automate complex business processes like updating records or sending notifications based on certain conditions (e.g., lease renewal reminders or maintenance request follow-ups).

Apex Triggers: Set up Apex triggers for automating tasks that require advanced logic, such as sending emails if rent payment is overdue or verifying data before insertion.

4. App Creation: Create a *custom Lightning app* to bundle the various tabs (tenant, lease, issues) together for easy access by users.

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5. Reports and Dashboards: Generate *reports* on tenant management, lease tracking, and tenant issues.
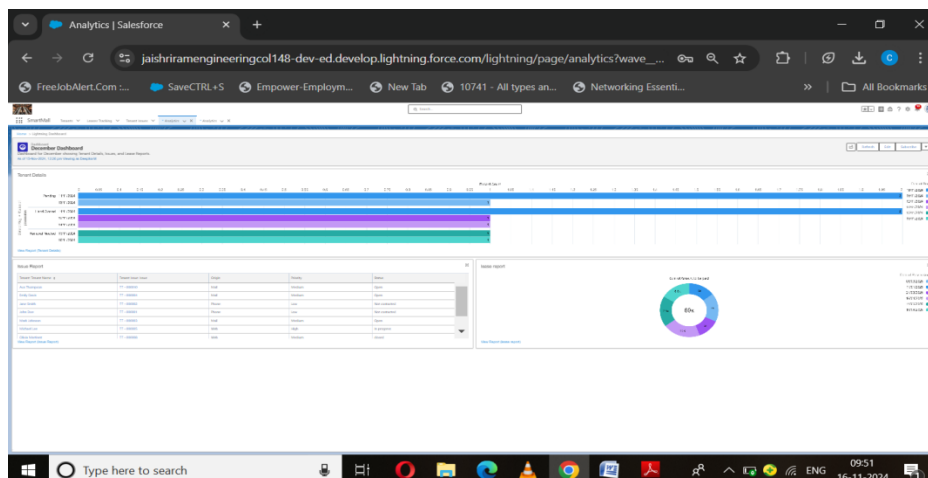
   Create a *dashboard* to visualize data insights, enabling better decision-making.

6. Integration with Other Salesforce Tools: Leverage Salesforce's powerful reporting, security, and automation tools to enhance the app's capabilities.

 Additional Requirements:

1. Customization: The app should be flexible enough to adapt to different mall management requirements, such as unique lease structures or maintenance workflows.

2. Security: Sensitive tenant and lease data should be protected using Salesforce's robust security model to ensure compliance with data protection regulations.

3. Scalability: The app should be designed to scale as the mall expands, potentially adding new tenants, leases, or maintenance operations.

4. User Training and Support: Salesforce's user-friendly interface should be supplemented with training resources to ensure all stakeholders (property managers, tenants, etc.) can easily navigate and utilize the system.

5. Integration with Third-Party Systems: For larger malls, integrating the CRM app with other enterprise systems, such as finance software or building management systems, may be necessary for seamless operation.

6. Performance: Ensure the system is optimized for performance, especially when dealing with a large volume of tenant data or lease records, to maintain efficiency and responsiveness.

Output:

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This project leverages Sales force's capabilities for CRM, automation, reporting, and security to enhance mall management operations and make them more efficient.

TEAM MEMBERS:

M.Deepika(au711221104011)

S.Dharshini(au711221104014)

S.Swetha(au711221104055)

P.Tamilselvi(au711221104702)