Project Document Template

**CRM Application to Manage the Mall**

## Project Overview

This project focuses on developing a Management App on the Salesforce platform to streamline and enhance the administration of commercial malls. The app is designed to address challenges such as lease tracking, tenant communication, and actionable decision-making. It aims to improve operational efficiency, tenant satisfaction, and data-driven insights for mall managers.

# Objectives

**Business Goals:**

* Optimize lease management and reduce administrative overhead.
* Enhance tenant engagement and satisfaction.
* Provide advanced analytics for informed decision-making.

**Specific Outcomes:**

* Automated lease tracking system.
* Tenant communication portal integrated with CRM.
* Comprehensive reporting dashboards.

# SalesforceKeyFeaturesandConceptsUtilized

* **Core CRM Functionalities:** Tenant and lease record management.
* **Process Automation:** Automated workflows for lease renewals and notifications.
* **Analytics and Reporting:** Dashboards to monitor lease statuses and tenant performance.
* **User Interface Enhancements**: Customized UI for tenant interactions.
* **Integration:** APIs for linking external payment systems and services.

# Detailed Steps to Solution Design

1. **Requirement Gathering:** Identify mall management needs.
2. **Data Modeling:** Create objects for tenants, leases, and payments.
3. **UI/UX Design:** Develop intuitive interfaces for tenants and administrators.
4. **Business Logic Implementation:**

* Triggers for lease expiry reminders.
* Flows for onboarding new tenants.

1. **Integration and APIs:** Connect with external systems for seamless operations.

# TestingandValidation

* **Unit Testing:** Validate Apex classes and triggers for functionality.
* **User Interface Testing:** Ensure a user-friendly experience.
* **Scenarios Addressed:**
* Lease expiration and renewal workflow.
* Tenant onboarding and issue resolution.
* Report generation for revenue tracking.

# Key Scenarios Addressed by Salesforce in the Implementation Project

1. Automatic lease renewal notifications to tenants.
2. Real-time tenant satisfaction tracking.
3. Centralized dashboard for mall management.

# Conclusion

**Summary of Achievements:**  
This app successfully integrates Salesforce’s robust CRM capabilities with the unique needs of mall management, delivering an all-in-one platform for improved operational efficiency, tenant satisfaction, and data-driven decision-making.