



## **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.

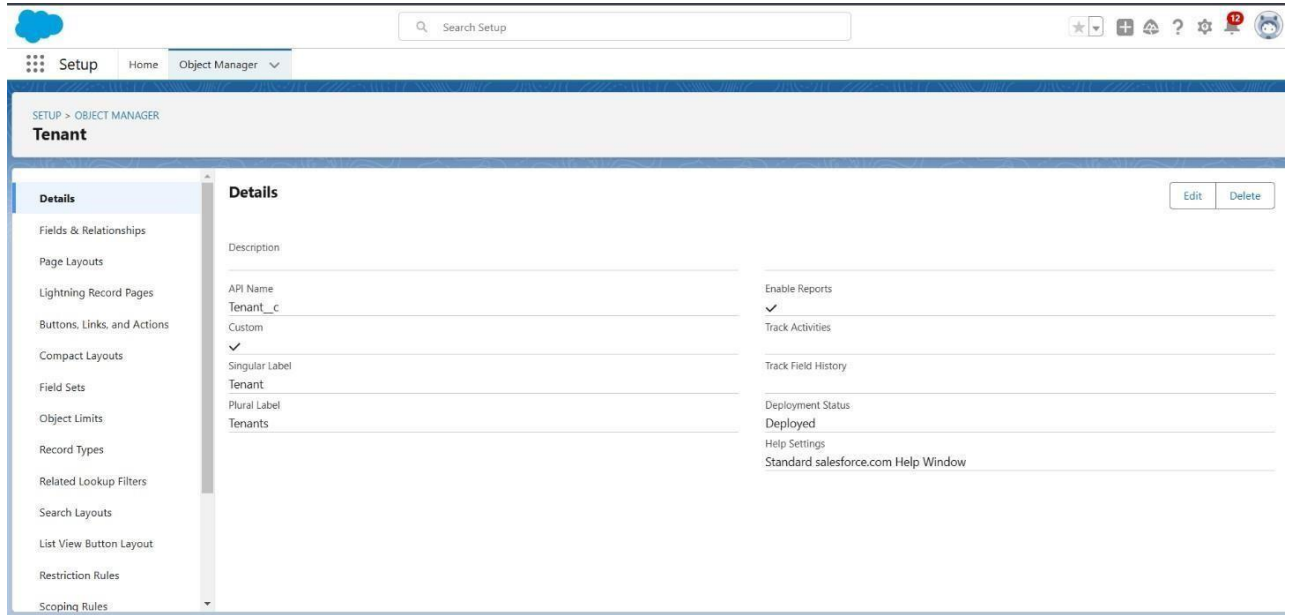
### **3. Salesforce Key Features and Concepts Utilized:**

- **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)

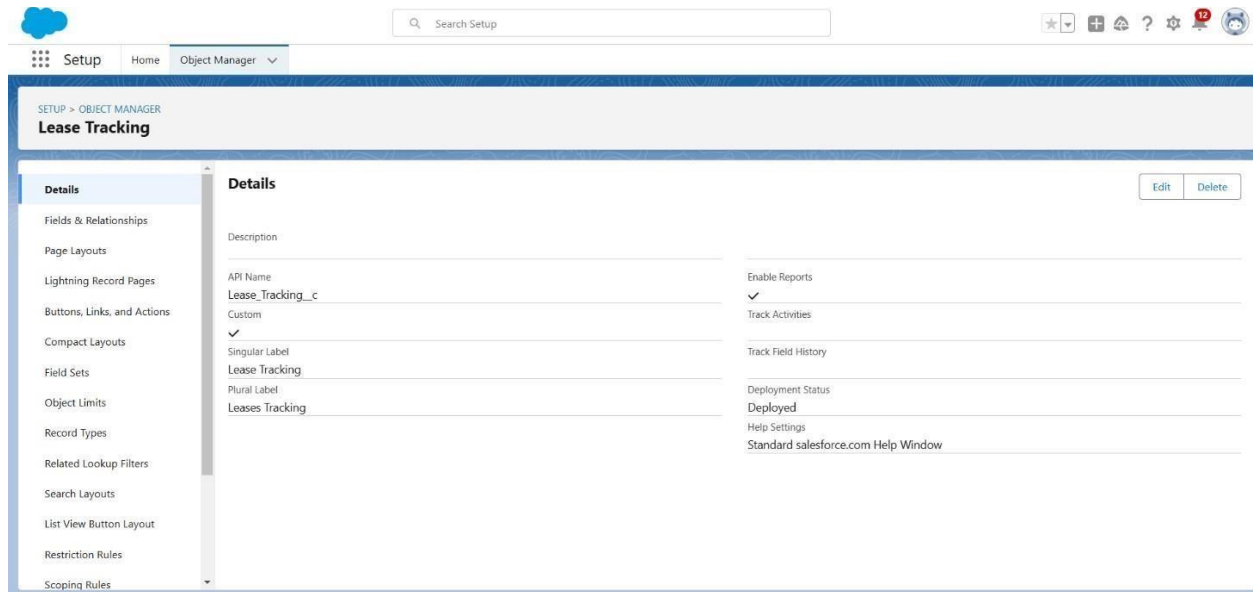
### **4. Detailed Steps to Solution Design:**

#### **1. To create an custom object**

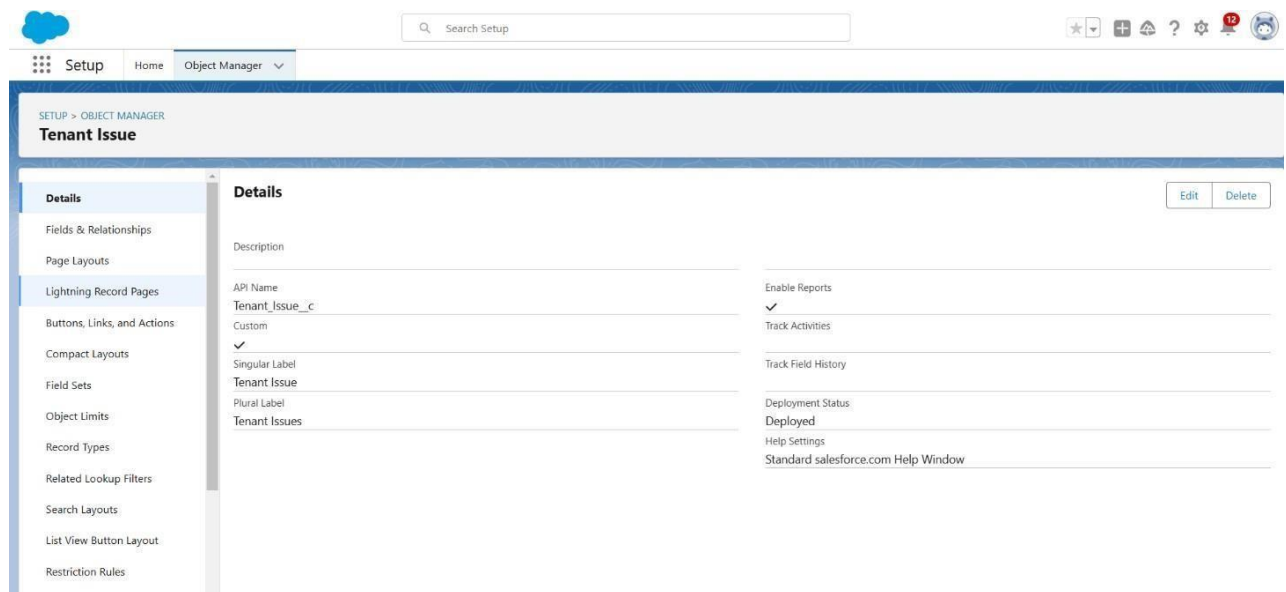
##### **a. Tenant object:**



## b. Lease tracking object:

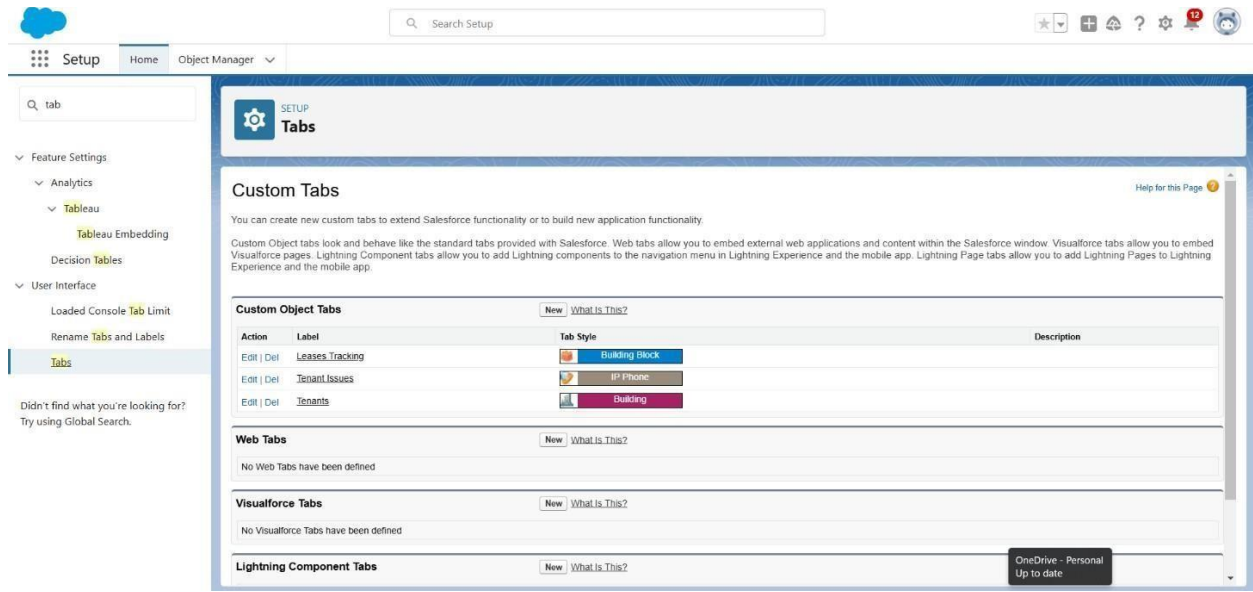


## c. Tenant issues:



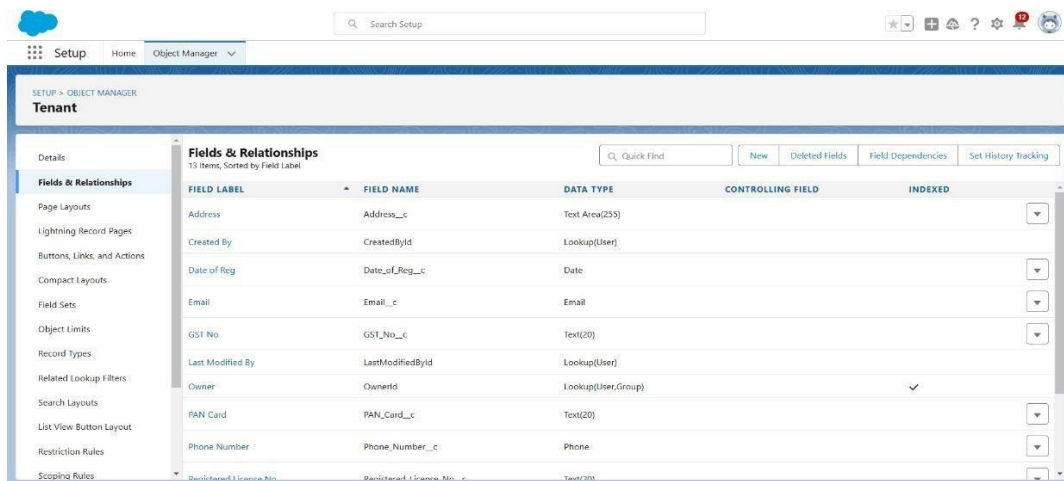
## 2. Tab:

## Create a Custom tab:

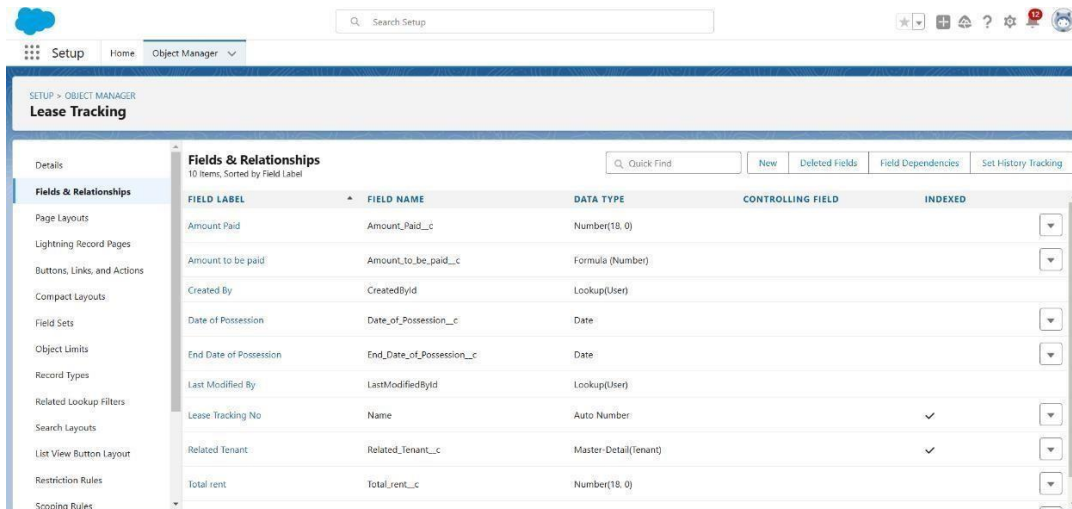


### 3. Fields and Relationship:

#### a.Tenant:



#### b.Lease tracking:



Setup > OBJECT MANAGER  
**Lease Tracking**

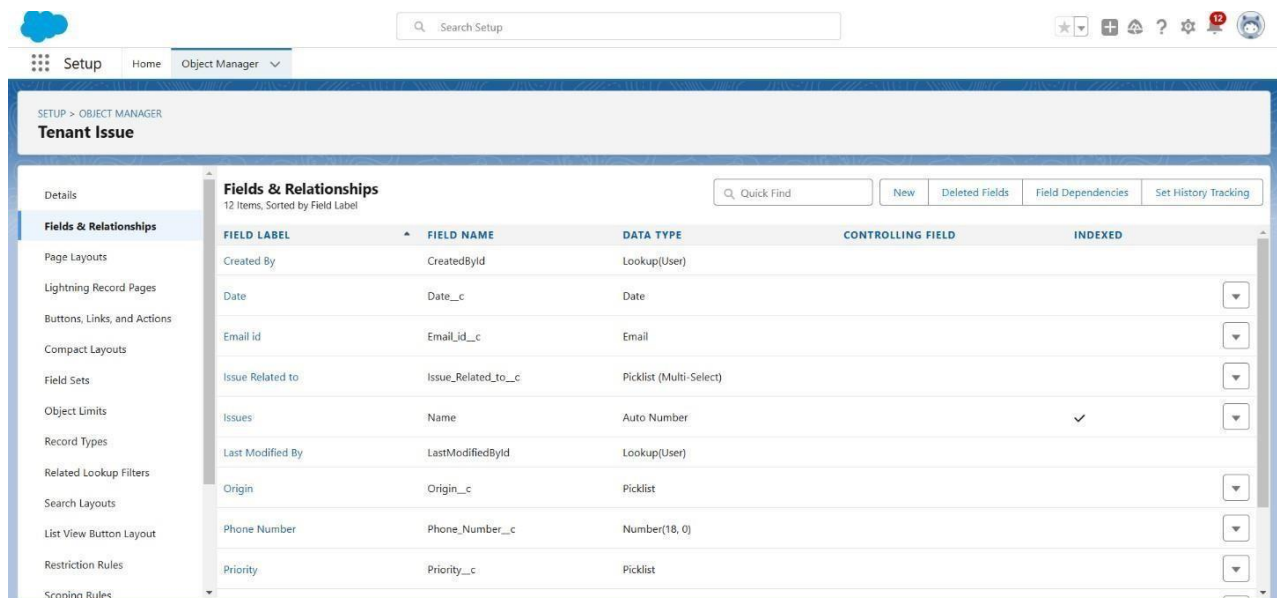
Details

**Fields & Relationships**  
10 Items, Sorted by Field Label

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:



Setup > OBJECT MANAGER  
**Tenant Issue**

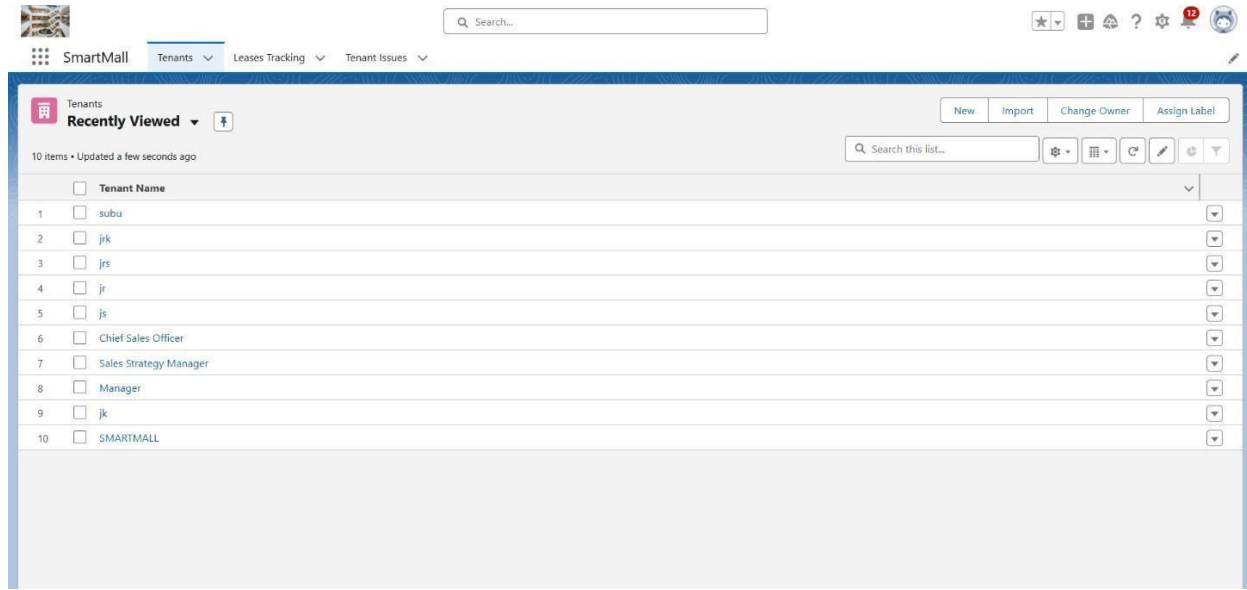
Details

**Fields & Relationships**  
12 Items, Sorted by Field Label

Quick Find: [ ] New Deleted Fields Field Dependencies Set History Tracking

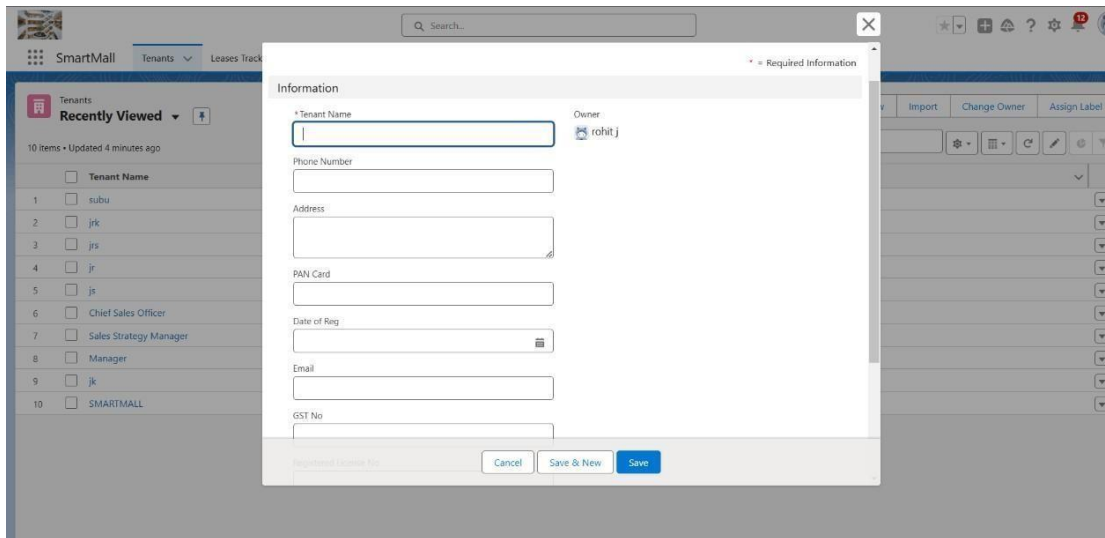
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Date	Date__c	Date		
Email id	Email_id__c	Email		
Issue Related to	Issue_Related_to__c	Picklist (Multi-Select)		
Issues	Name	Auto Number		✓
Last Modified By	LastModifiedById	Lookup(User)		
Origin	Origin__c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

## 4. Lightning app builder:



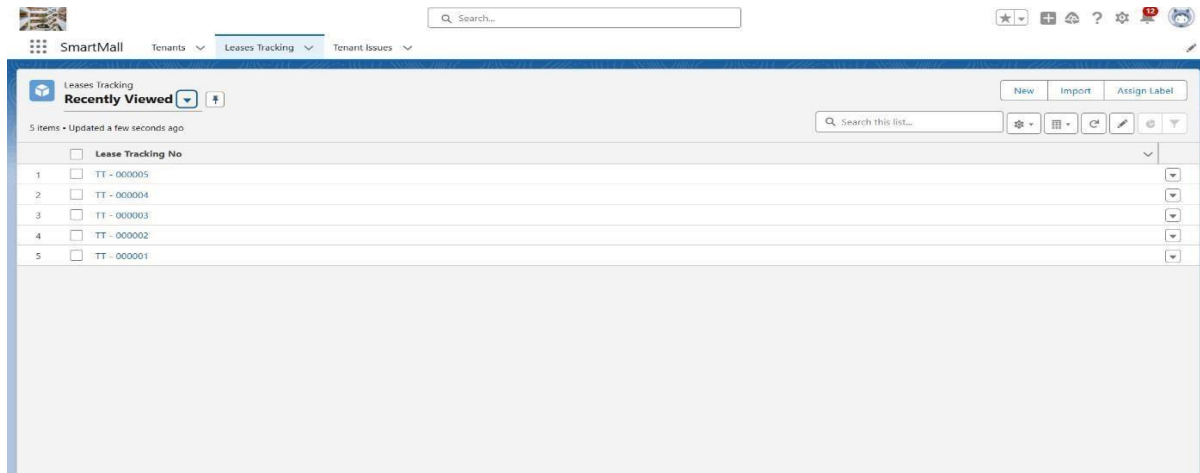
## 5. Records insertion:

### a. Tenant object:



### b. Lease tracking:

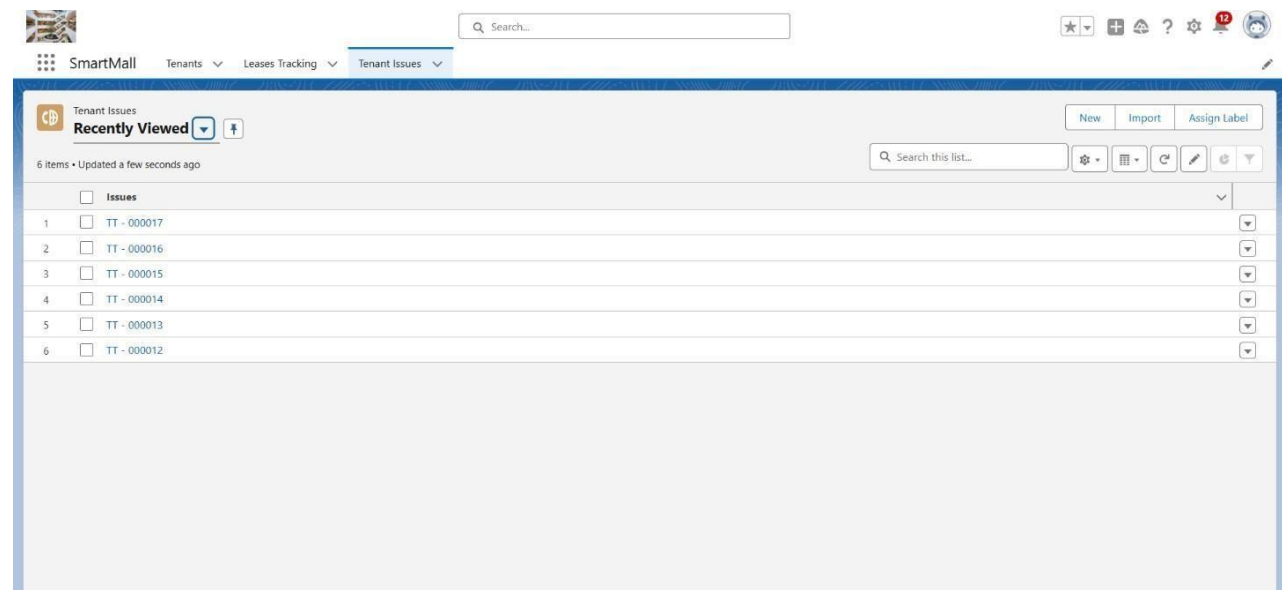




SmartMail interface showing the 'Leases Tracking' section. The top navigation bar includes 'SmartMail', 'Tenants', 'Leases Tracking', and 'Tenant Issues'. A search bar is present. The 'Leases Tracking' section is active, displaying a table of lease tracking items. The table has columns for 'Lease Tracking No' and a dropdown menu. The table contains 5 items, updated a few seconds ago. The items are listed in a table with a 'Lease Tracking No' column and a dropdown menu.

	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	

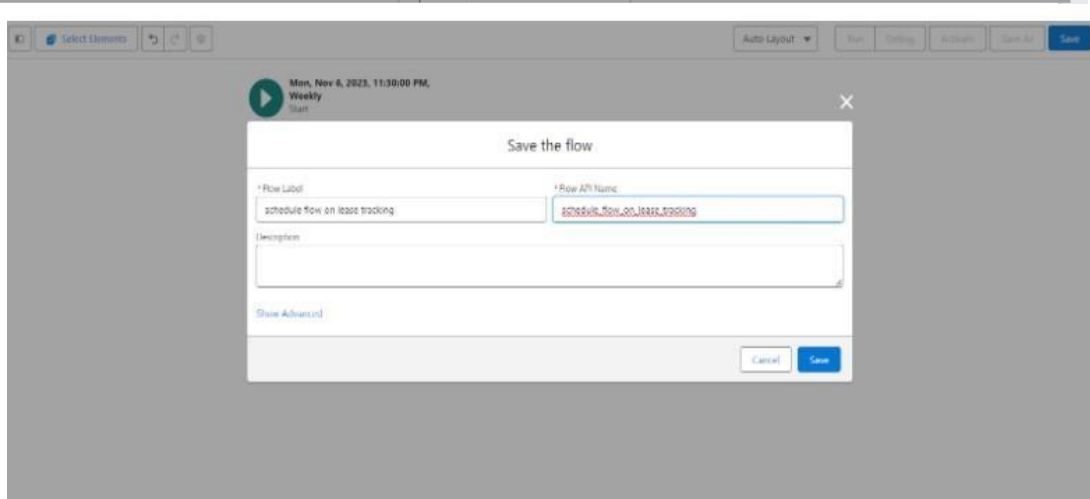
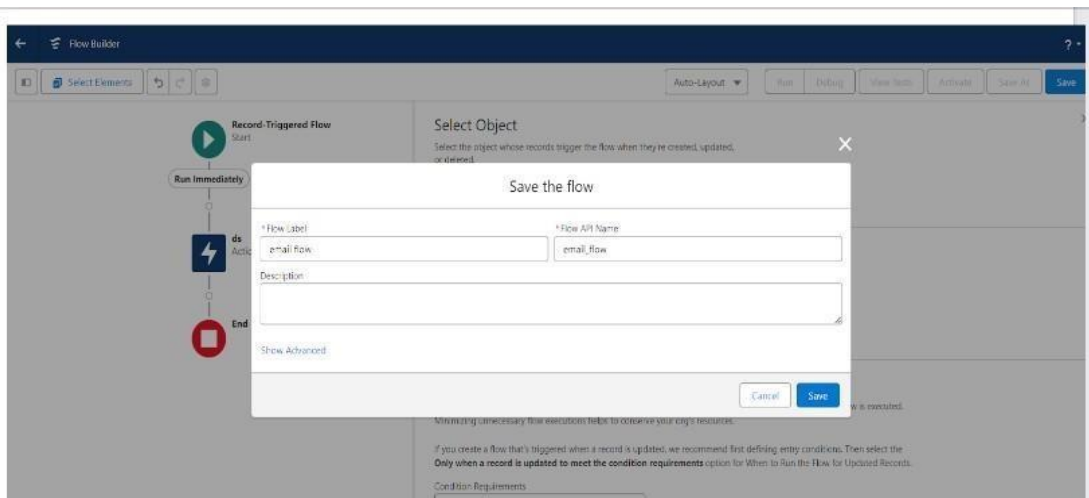
## c.Tenant issues:



SmartMail interface showing the 'Tenant Issues' section. The top navigation bar includes 'SmartMail', 'Tenants', 'Leases Tracking', and 'Tenant Issues'. A search bar is present. The 'Tenant Issues' section is active, displaying a table of tenant issues. The table has columns for 'Issues' and a dropdown menu. The table contains 6 items, updated a few seconds ago. The items are listed in a table with an 'Issues' column and a dropdown menu.

	Issues	
1	<input type="checkbox"/> TT - 000017	
2	<input type="checkbox"/> TT - 000016	
3	<input type="checkbox"/> TT - 000015	
4	<input type="checkbox"/> TT - 000014	
5	<input type="checkbox"/> TT - 000013	
6	<input type="checkbox"/> TT - 000012	

## 6. Create a flow:



## 5. Testing and Validation:

# 1.Apex Triggers:

```
Code Coverage: None | API Version: 59 | Go
1 public class LeaseTrackingTriggerHandler {
2
3     public static void method1(List<Lease_Tracking__c> lti)
4     {
5         for(Lease_Tracking__c lt2: lti )
6         {
7             if(lt2.Amount_to_be_paid__c > (lt2.Total_rent_Yearly__c)/2)
8             {
9                 Messaging.SingleEmailMessage M = New Messaging.SingleEmailMessage();
10
11                 List<String> ToADD = New List<String>{lt2.Email_id__c};
12
13                 M.setToAddresses(ToADD);
14                 M.setSubject('Regarding the Pending Rent');
15                 M.setPlainTextBody('Hello, This is an Reminder for you to complete your due rent by the end this month, your due rent thatneeds to be paid i
16
17
18
19                 List<Messaging.Email> AB = New List<Messaging.Email>{};
20                 AB.add(M);
21                 Messaging.sendEmail(AB);
22
23             }
24         }
25     }
26 }
27
28
29
```

```
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/Flag	Amount to be paid	Date of Possession	Tenant/ Tenant Name	remaining amount
11/19/2023 (1)	300,000.00	3/9/2024	prigat	yellow
Subtotal	300,000.00			
11/22/2023 (3)	300,000.00	2/26/2024	mytel	yellow
	500,000.00	4/25/2024	naidon	yellow
	1,000,000.00	3/9/2024	halu Ramesh bodge	Blue
Subtotal	1,800,000.00			
12/2/2023 (1)	200,000.00	3/22/2024	sky	yellow
Subtotal	200,000.00			
12/4/2023 (1)	400,000.00	-	sat	yellow
Subtotal	400,000.00			
3/13/2024 (1)	200,000.00	2/26/2024	Dadu bodge	yellow
Subtotal	200,000.00			
Total (7)	2,800,000.00			

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

Outline

Filters

Fields

Groups

GROUP ROWS

Add group...

Date

GROUP COLUMNS

Add group...

Columns

Add column...

Origin

Priority

Status

Tenant: Tenant Name

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

Row Counts Detail Rows Subtotals Grand Total

c.Tenant records:

REPORT  
New Tenants Report

Tenants

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

Update Preview Automatically

Outline

Filters

Fields

Groups

GROUP ROWS

Add group...

Status of Possession

GROUP COLUMNS

Add group...

DateofReg

Columns

Add column...

Tenant: Tenant Name

GST No

Pan Card no

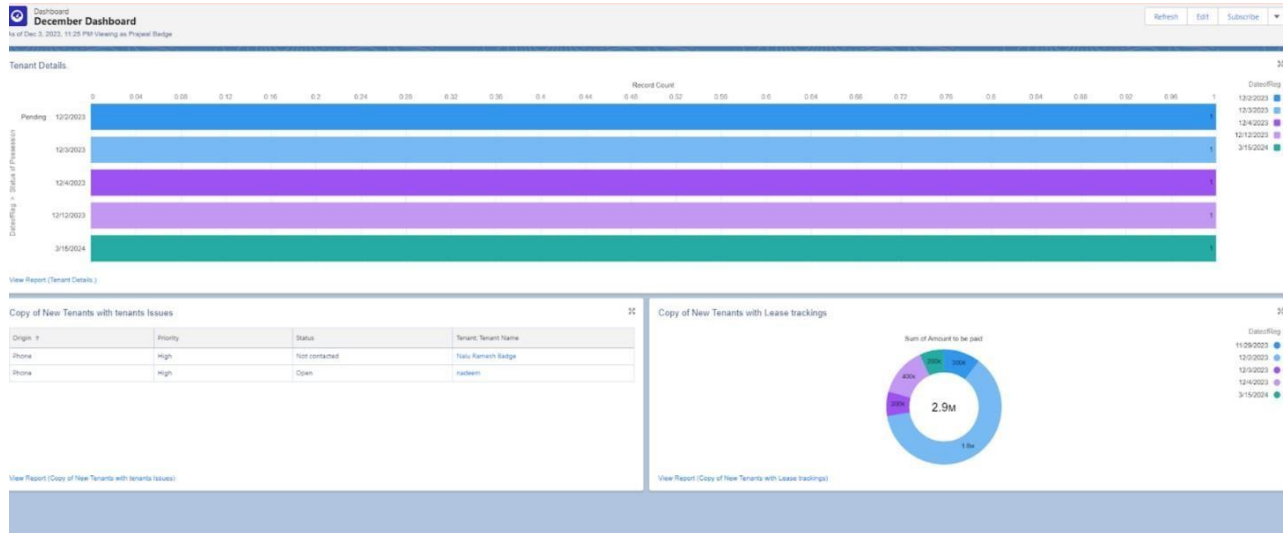
Status of Possession	DateofReg	12/2/2023	12/3/2023	12/4/2023	12/12/2023	3/15/2024	Total
Pending	Record Count	1	1	1	1	1	5
Total	Record Count	1	1	1	1	1	5

Details (5 Rows) Click an intersection in the table above to filter details.

Tenant: Tenant Name	GST No	Pan Card no
1 myself	=	123eeda
2 sky	48789	51515awd
3 sau	=	51515awd
4 rakesh	=	51515awd
5 Dadu badge	gstno2	ww2345
6		

Row Counts Detail Rows Grand Total Stacked Summaries Conditional Formatting

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>