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.

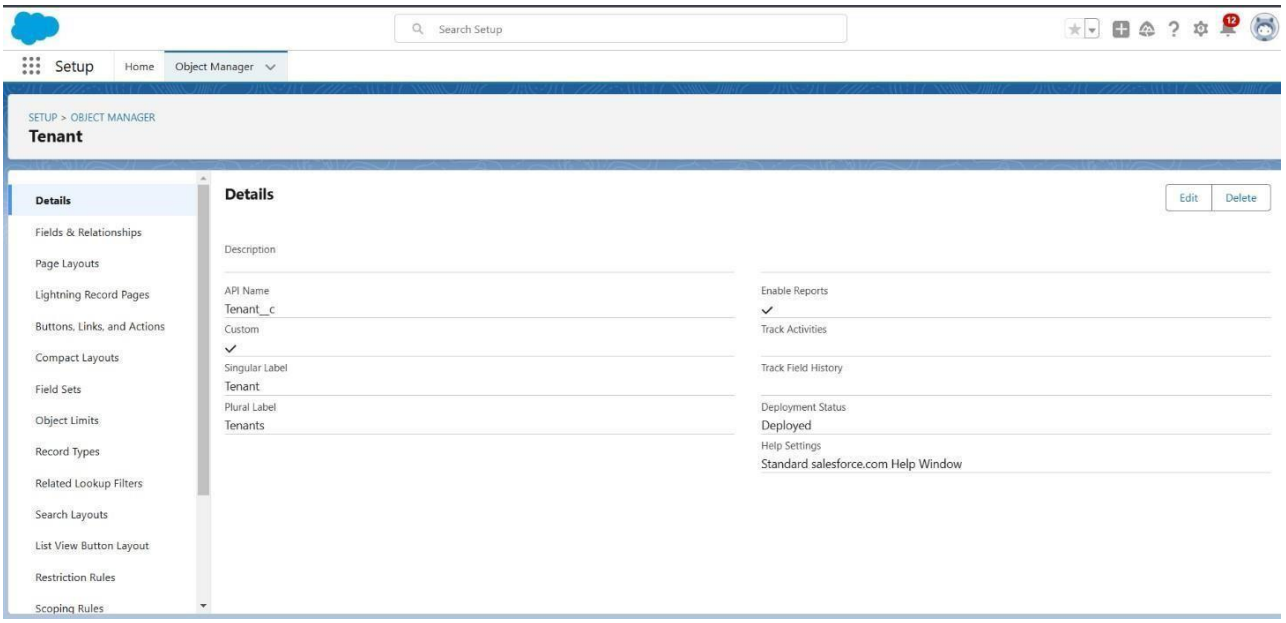
3. Salesforce Key Features and Concepts Utilized:

- **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)

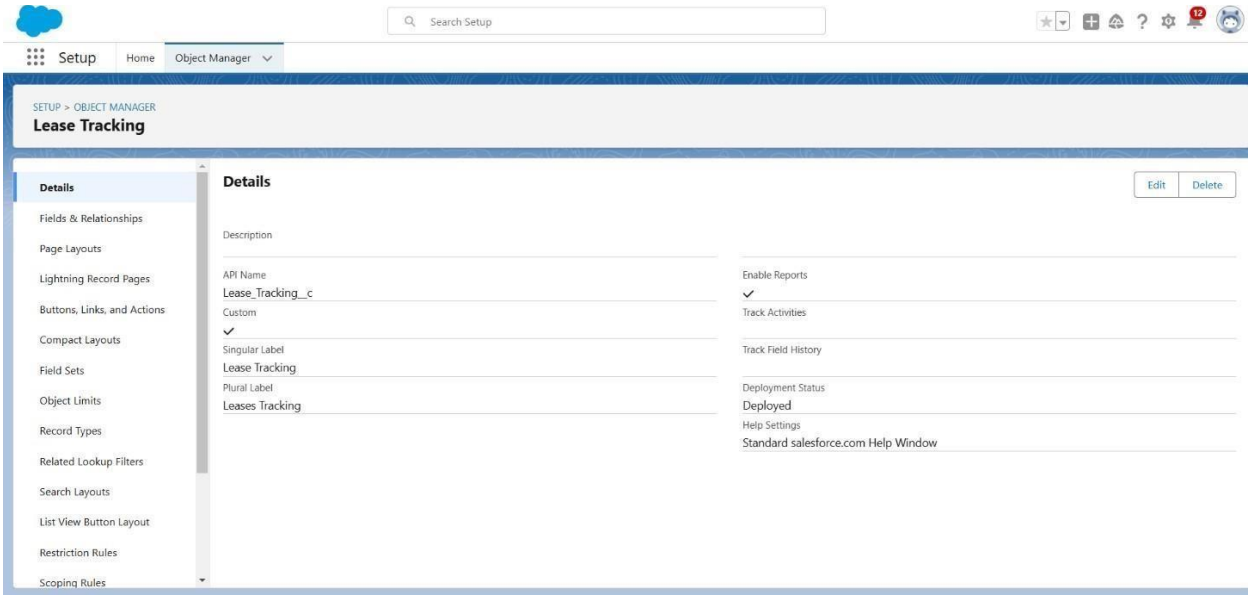
4. Detailed Steps to Solution Design:

1. To create an custom object

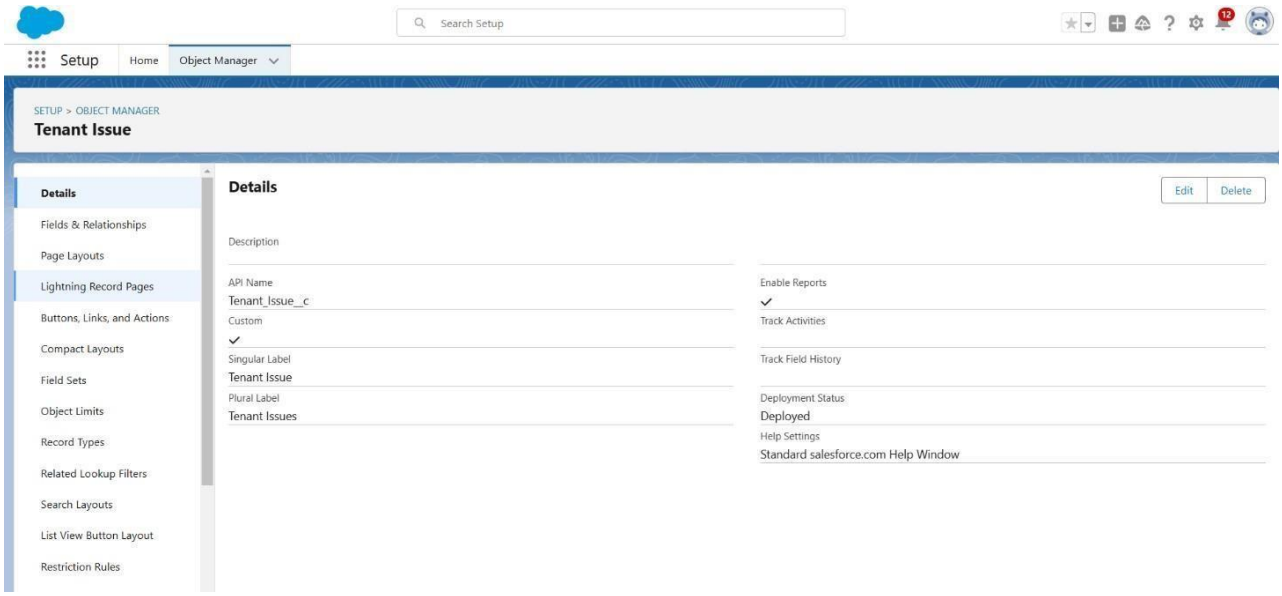
a. Tenant object:



b. Lease tracking object:

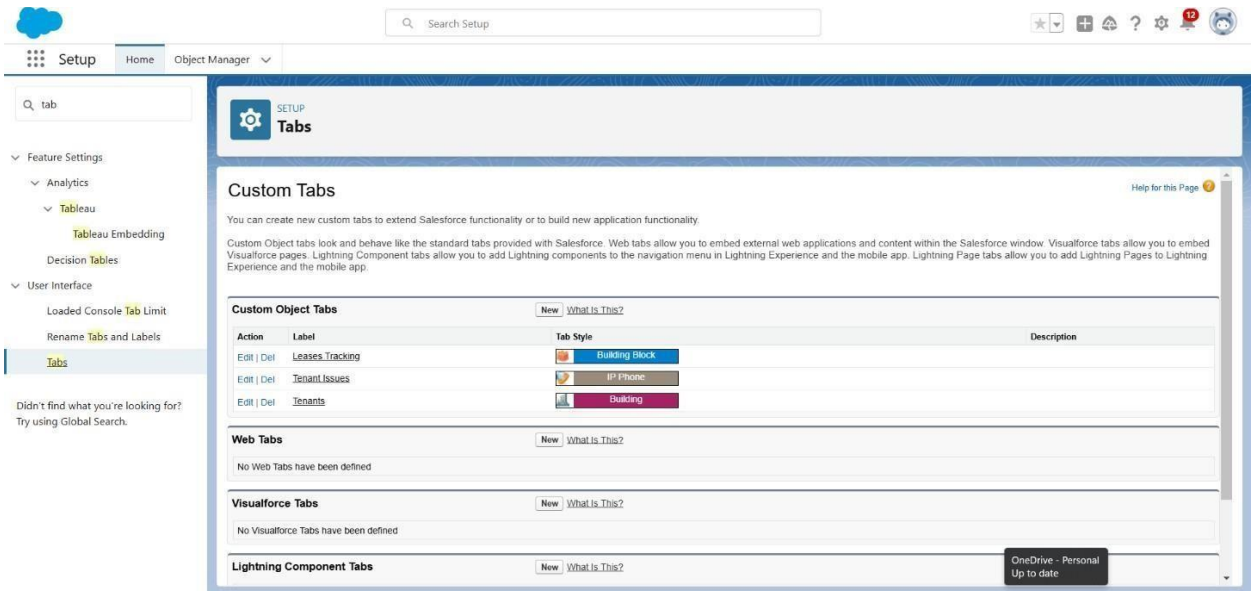


c. Tenant issues:



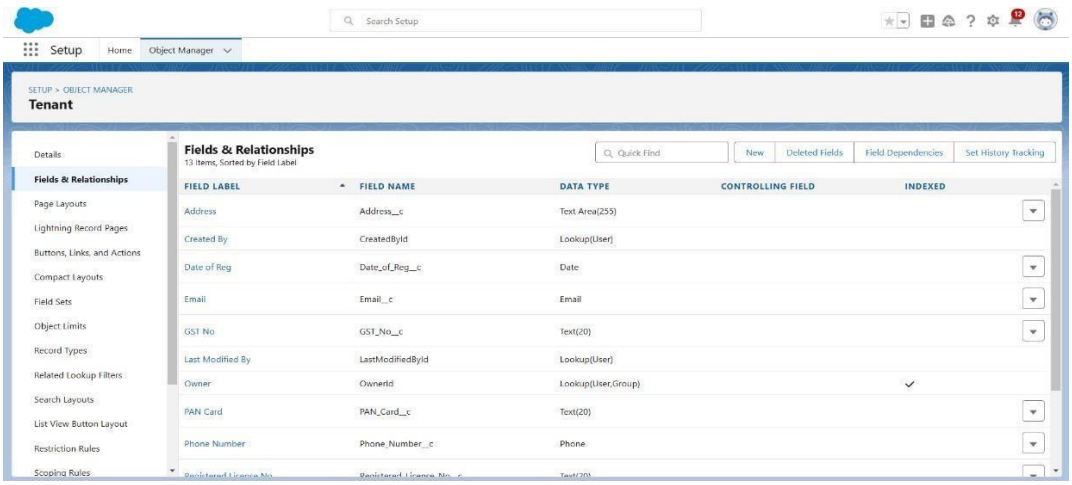
2. Tab:

Create a Custom tab:

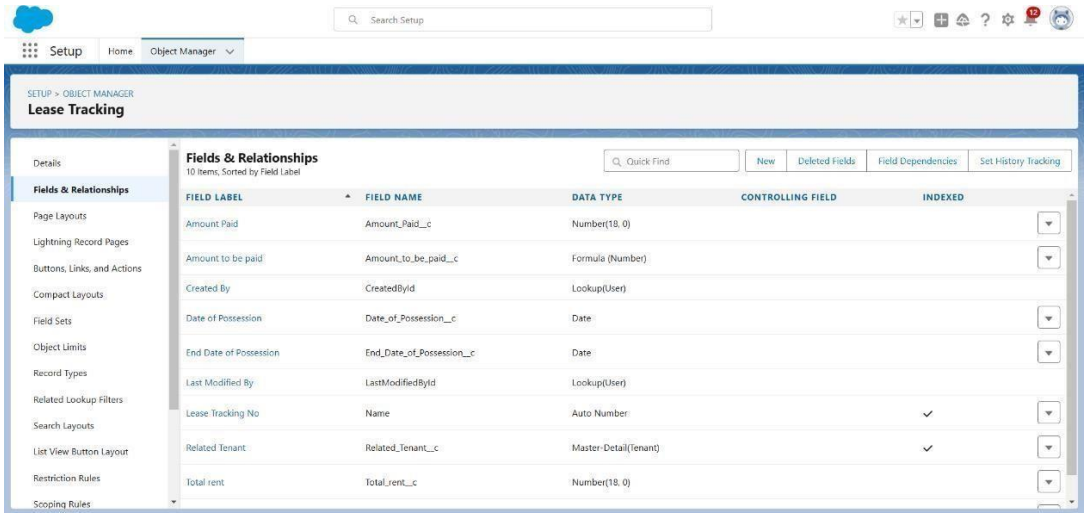


3. Fields and Relationship:

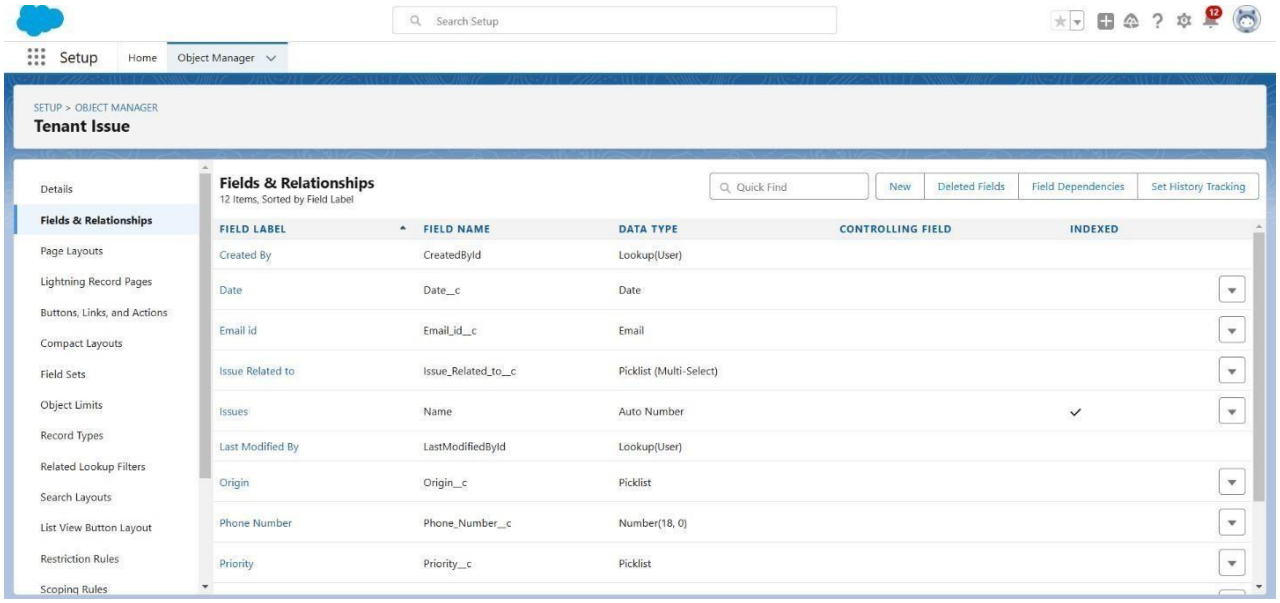
a.Tenant:



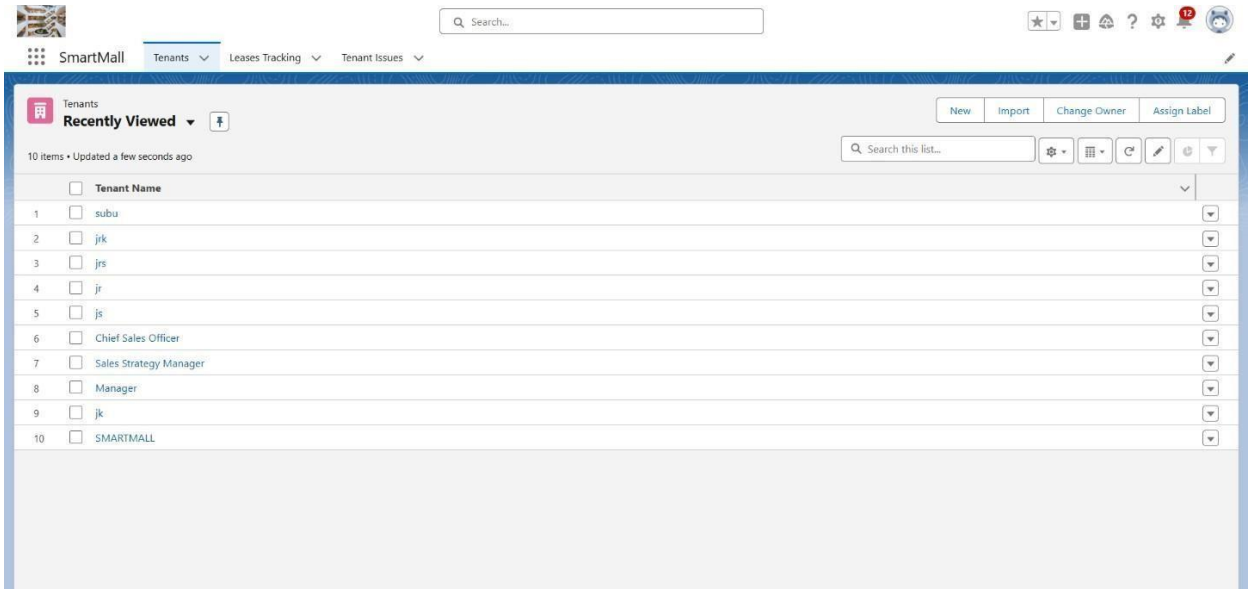
b.Lease tracking:



c.Tenant issues:

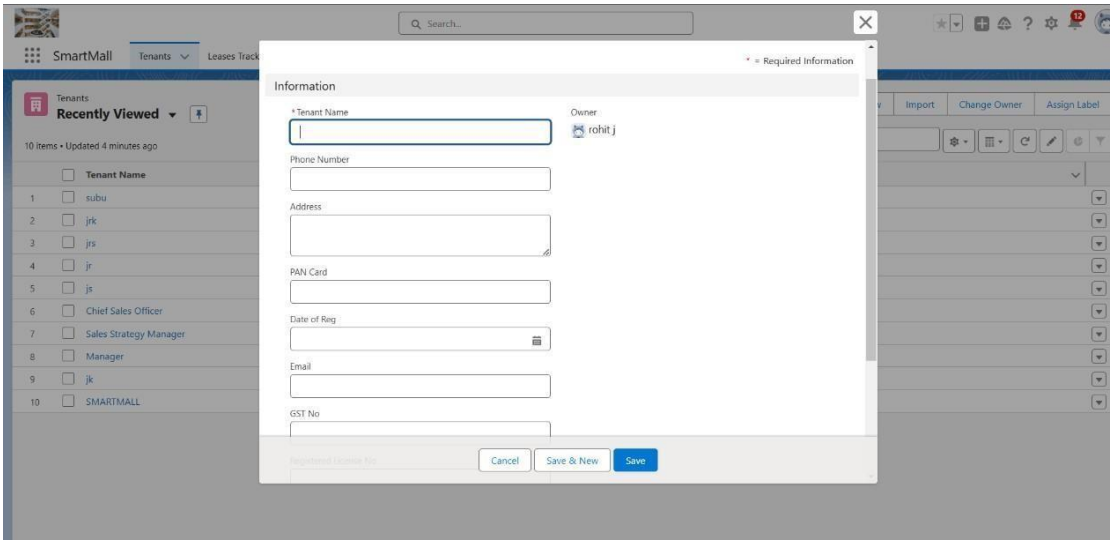


4. Lightning app builder:

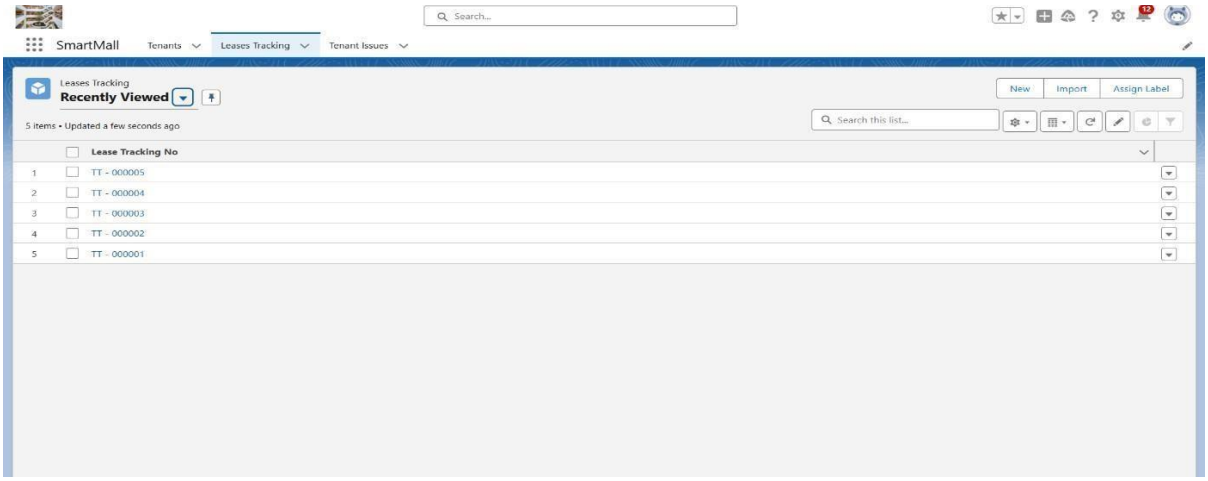


5. Records insertion:

a.Tenant object:



b.Lease tracking:



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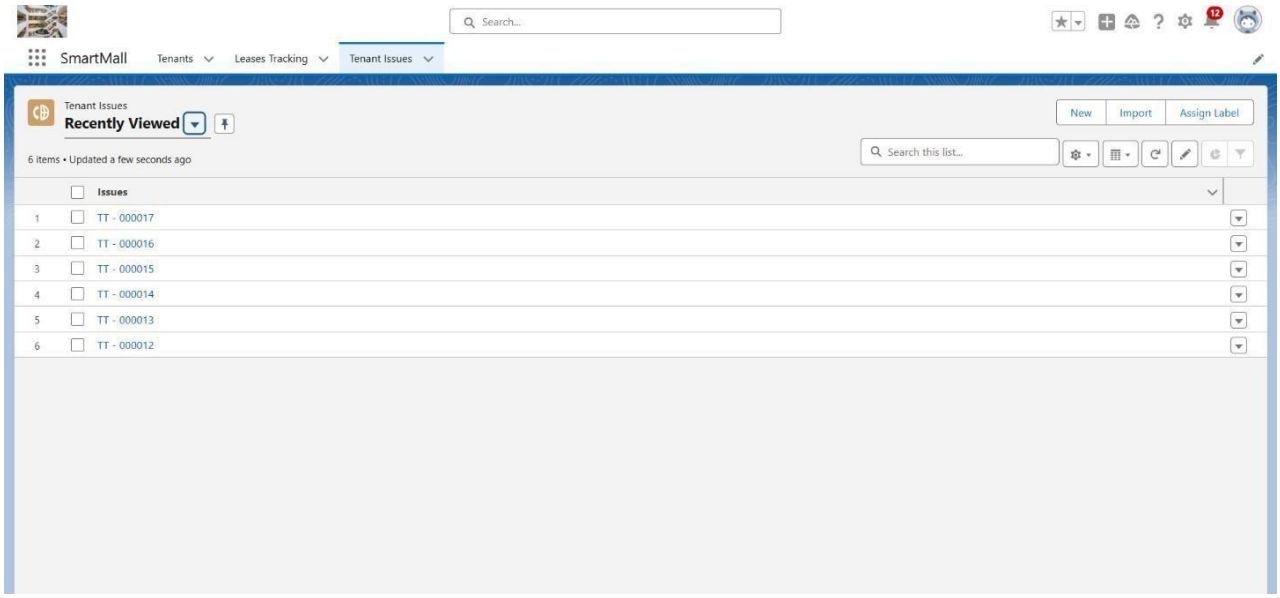
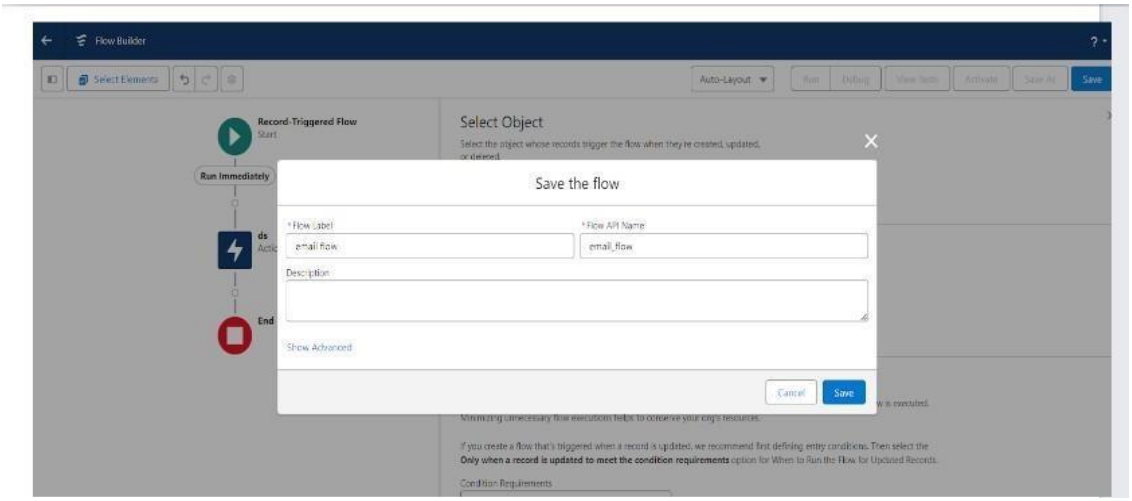
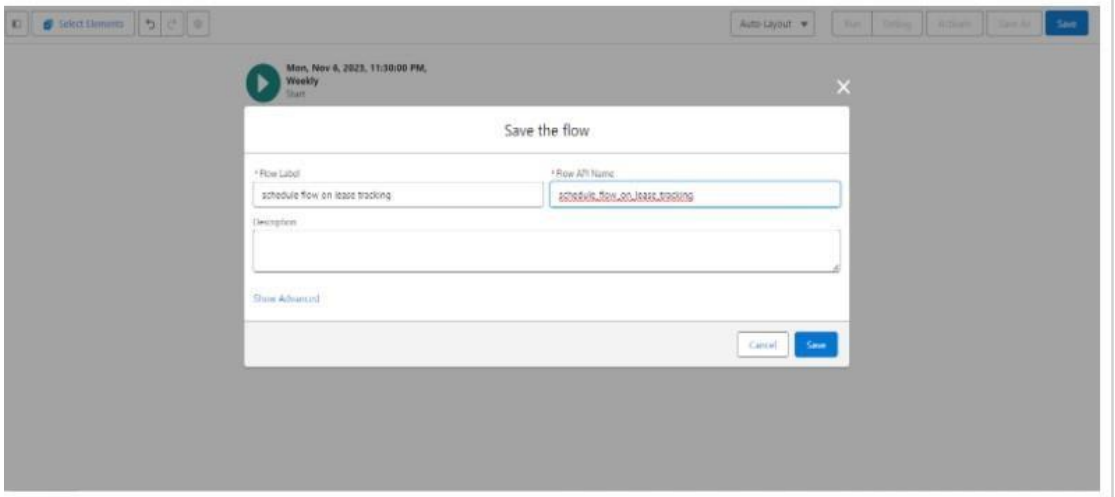


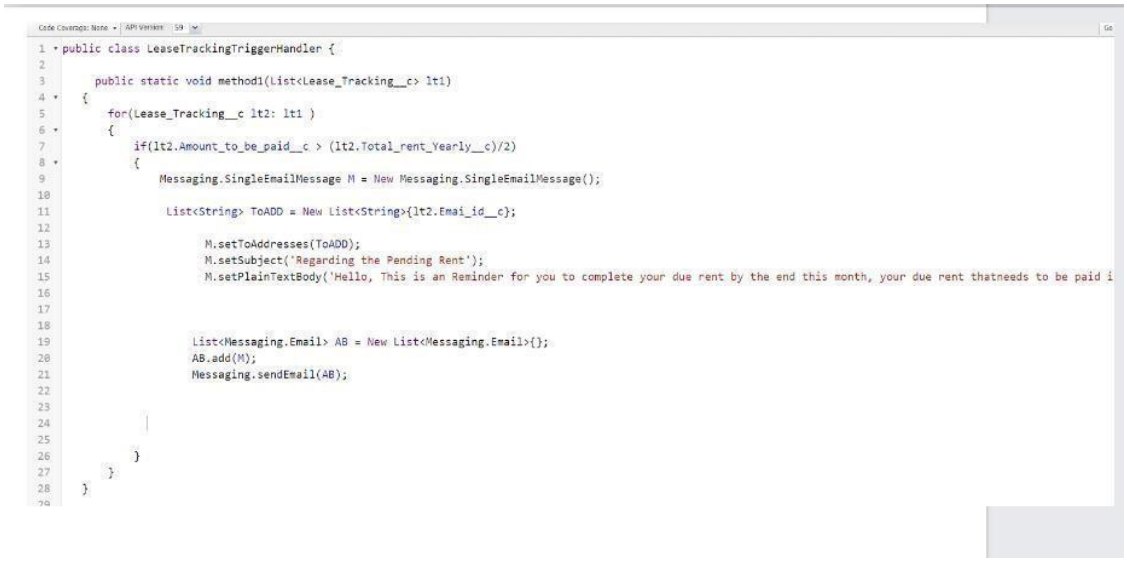
6. Create a flow:



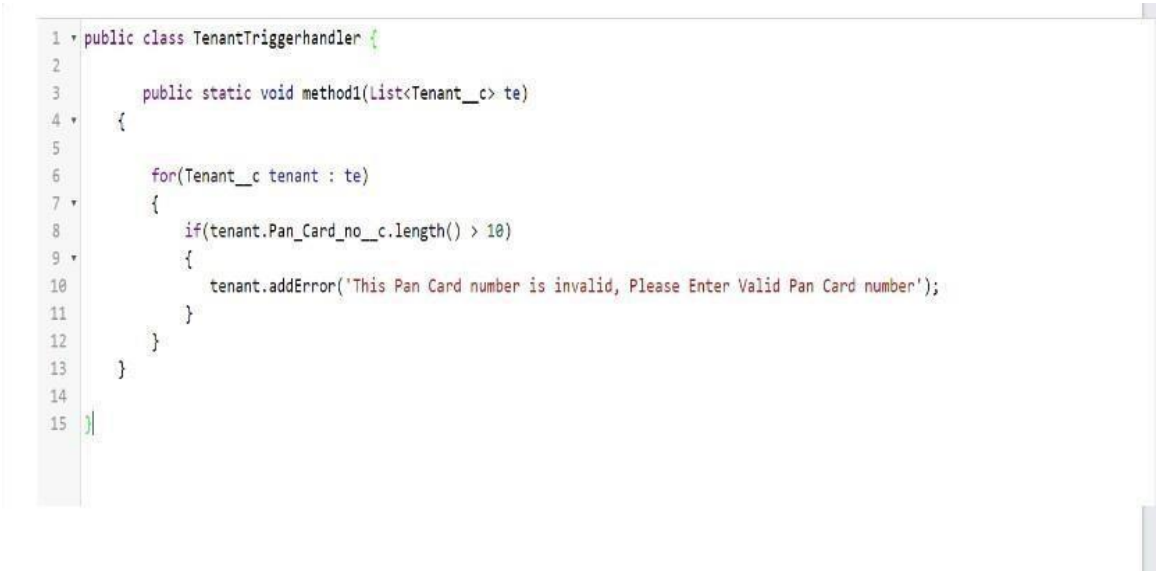


5. Testing and Validation:

1.Apex Triggers:



```
public class LeaseTrackingTriggerHandler {

    public static void method1(List<Lease_Tracking__c> lt1)
  {
      for(Lease_Tracking__c lt2: lt1 )
      {
          if(lt2.Amount_to_be_paid__c > (lt2.Total_rent_Yearly__c)/2)
          {
              Messaging.SingleEmailMessage M = New Messaging.SingleEmailMessage();

               List<String> ToADD = New List<String>{lt2.Emai_id__c};

                    M.setToAddresses(ToADD);
                    M.setSubject('Regarding the Pending Rent');
                    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


                  List<Messaging.Email> AB = New List<Messaging.Email>{};
                  AB.add(M);
                  Messaging.sendEmail(AB);


          }
      }
  }
```



```
public class TenantTriggerhandler {

    public static void method1(List<Tenant__c> te)
  {

      for(Tenant__c tenant : te)
      {
          if(tenant.Pan_Card_no__c.length() > 10)
          {
             tenant.addError('This Pan Card number is invalid, Please Enter Valid Pan Card number');
          }
      }
  }

}
```

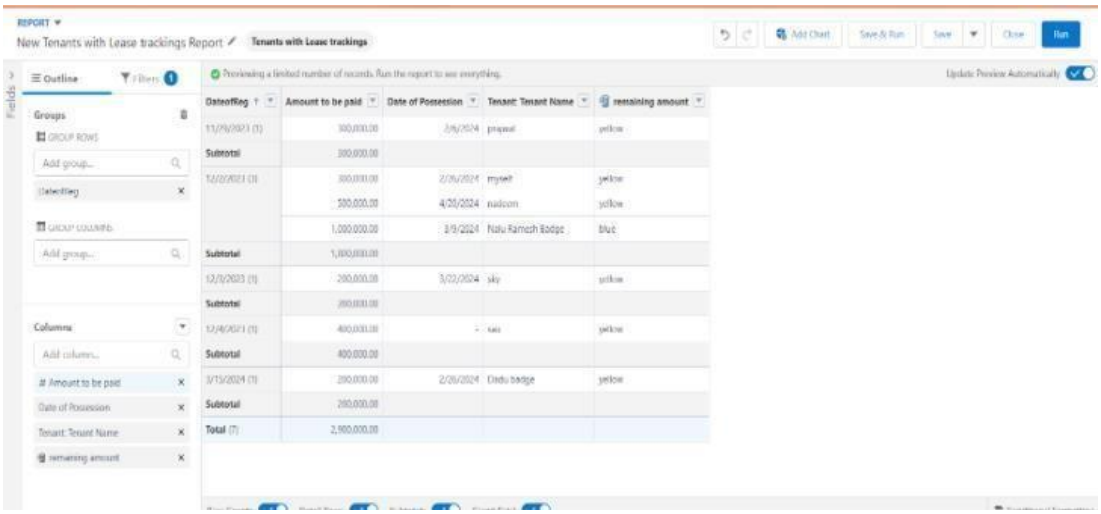
2.Asynchronous Apex:

Schedule apex:

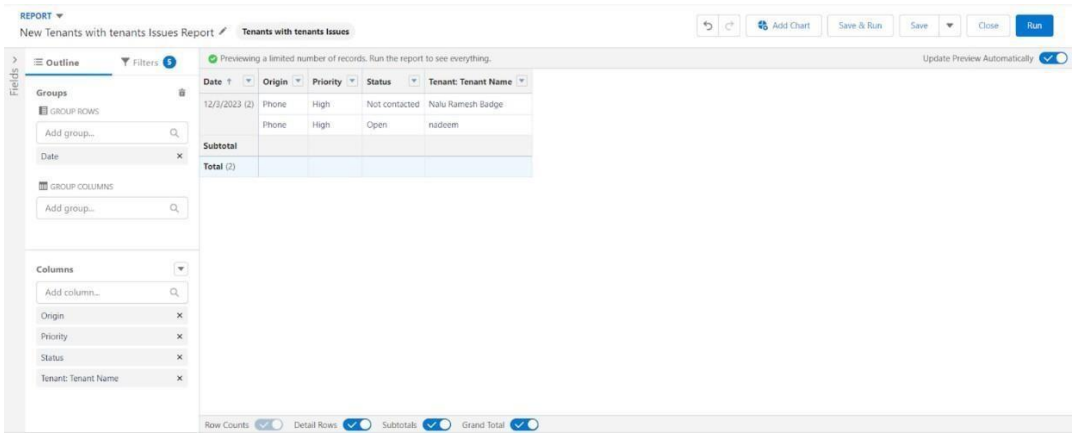
```
Code Coverage: None  API Version: 59
1  public class tenantschedulable implements Schedulable
2  {
3      public void execute(Schedulablecontext sc)
4      {
5         list<Tenant__c>  ten = [SELECT Id, Status_of_Possession__c FROM Tenant__c ];
6          list<Tenant__c> tenantstodelete = New List<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:

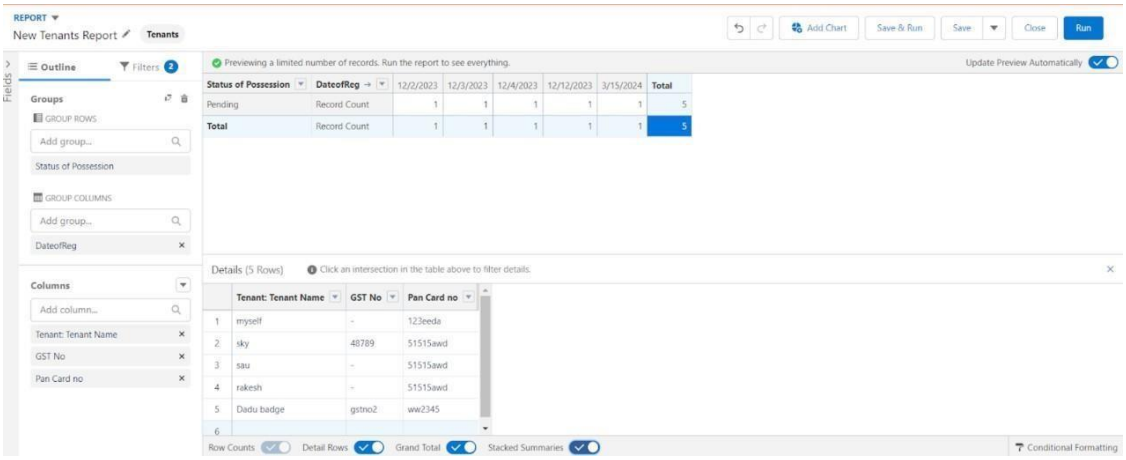
a.Lease management records:



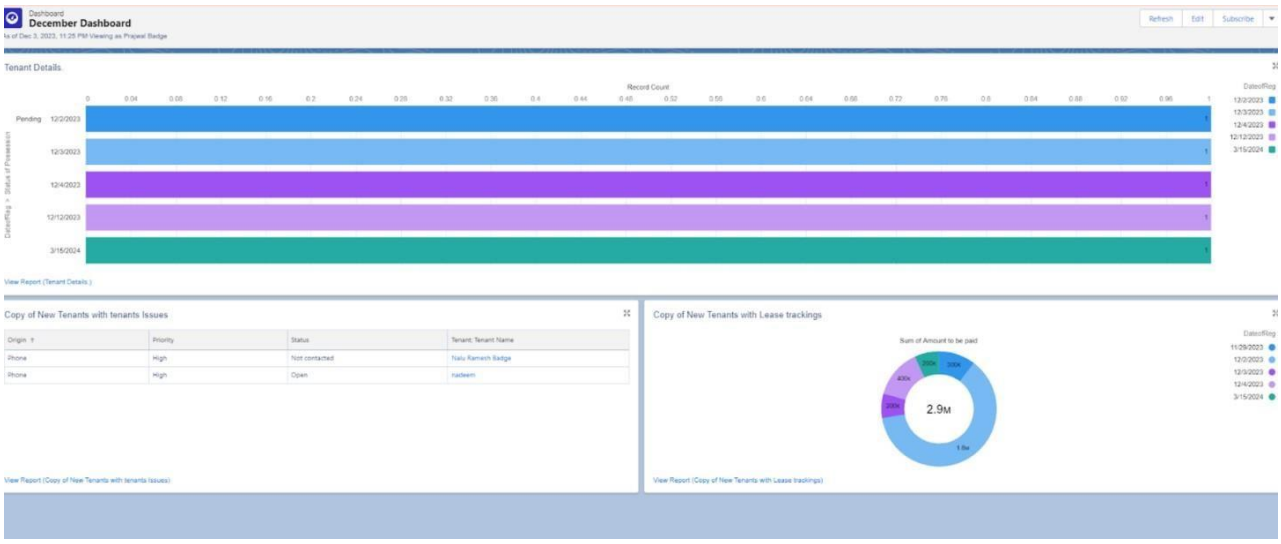
b.Tenant issues records:



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