

Ideation Phase
Brainstorm & Idea Prioritization
Template

Date	30 OCTOBER 2025
Team ID	2F2CA610622DBCB9AF44E9641A0CB552
Project Name	LEASE MANAGEMENT
Maximum Marks	4 Marks

Lease Management Project Template:

This guided project involves creating a Lease Management system within Salesforce to efficiently handle the processes related to leasing real estate properties, equipment, or other assets. The goal is to streamline and automate tasks such as lease agreement tracking, renewals, payments, and communication among stakeholders. The project ensures accuracy, compliance, and better visibility through Salesforce automation tools like Objects, Validation Rules, Approval Processes, Flows, and Apex Triggers.

The flow of implementation includes:

- Object Creation
- Tabs Configuration
- The Lightning App Setup
- Field Customization
- Validation Rules
- Email Templates
- Approval Process
- Apex Triggers
- Flows
- Schedule Class

Step-1: Team Gathering, Collaboration and Select the Problem Statement:

The team collaborated to identify a real-world challenge in property and asset management. The chosen problem focuses on automating lease lifecycle management using Salesforce. The system will simplify tasks such as tracking lease start and end dates, sending alerts for renewals, and maintaining complete records for landlords and tenants. The collaborative session helped define the project scope and objectives clearly.

Step-2: Brainstorm, Idea Listing and Grouping:

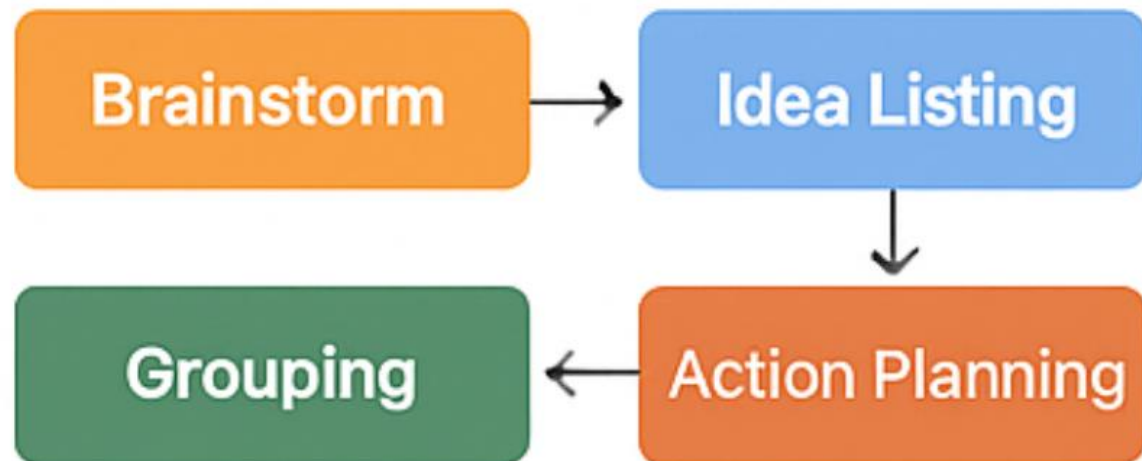
Brainstorm: Team members discussed automation needs for leasing workflows. Ideas included automated notifications, payment reminders, dynamic dashboards, and lease document generation.

Idea Listing: The following ideas were listed — Lease Tracking Object, Automated Email Alerts, Renewal Approval Process, Apex Trigger for Validation, and Scheduled Class for Report

Generation.

Grouping: Ideas were grouped into Salesforce development components — Data Model (Objects, Fields), Automation (Flows, Triggers), and Communication (Email Templates).

Action Planning: Tasks were divided among team members for Object setup, Flow creation, Validation testing, and deployment to the Lightning App.



Step-3: Idea Prioritization:

Idea prioritization helped the team organize tasks based on business impact and development complexity. The most critical features—Lease Object creation, Validation Rules, and Flows—were implemented first. Then, automation elements like Approval Process, Apex Trigger, and Scheduled Class were added for efficiency.



This approach ensured that data accuracy, process automation, and user experience were optimized in a structured way. Visual diagrams and testing scenarios validated the overall system flow and functionality.

The completed Lease Management application provides streamlined lease lifecycle management with Salesforce's low-code tools and custom Apex solutions.

Step-3: Idea Prioritization:



Fig3: Image of steps to prevent user deletion.

Idea Prioritization:

Idea polarization helps break down complex projects into clear, focused components. In this project, the main goal is to prevent user deletion if the account is assigned to an active incident. This approach ensures that data integrity and accountability are maintained during critical workflows. By polarizing ideas, we can separate incident management processes from routine administrative tasks. It also helps in highlighting the importance of user account security and controlled access. Each step, from detection to restriction, becomes easier to plan and implement. Clear visual representations like diagrams and flowcharts can simplify communication. Overall, idea polarization strengthens project clarity and supports smooth execution.