

# CUSTOMER JOURNEY MAP- Lease Management

Date	24 JUNE 2025
Team ID	LTVIP2025TMID31649
Project Name	Lease Management
Maximum Marks	

## Benefits for Requirement Analysis:

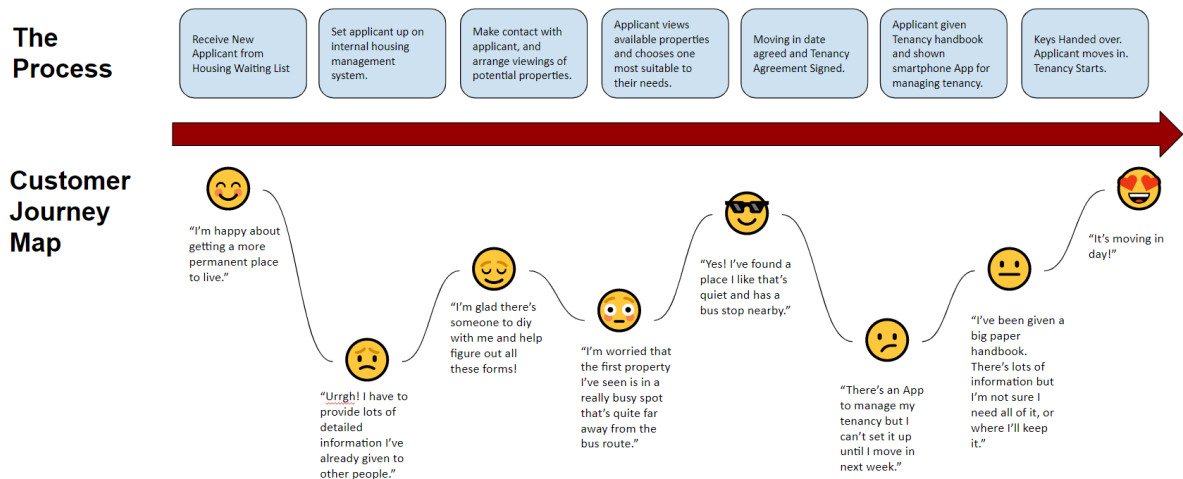
**Role Clarity:** Responsibilities (Tenant, Manager, System, Integrations) are delineated per stage,

**Integration Mapping:** Highlights necessary API touchpoints (DocuSign, payment systems, ERP sync)

**Automation Triggers:** Shows where Salesforce Flows, Approvals, and Reminders should execute.

**Pain Points Identified:** Manual handoffs, late notices, missing history, unclear communications are made visible.

**Traceable Requirements:** Each step clearly corresponds to functional requirements—custom objects (Lease/Tenant), flows (renewal reminders), integrations, and UI dynamics.



## Process Flow Stages:

### 1. Listing & Inquiry

- *Tenant*: Searches and requests info via portal
- *Property Manager*: Publishes listing and updates availability
- *Salesforce*: Captures inquiry and creates a Lead or Tenant record
- *External Systems*: None

## **2. Application & Screening**

- *Tenant*: Submits application
- *Property Manager*: Reviews and invokes screening
- *Salesforce*: Triggers Approval or Screening Flow, logs status update
- *External*: Tenant screening API (e.g. credit check)

## **3. Lease Generation & Signing**

- *Property Manager*: Generates lease via DocuSign
- *Tenant*: Signs electronically
- *Salesforce*: Sends DocuSign envelope, monitors status, logs signed document
- *External*: DocuSign

## **4. Onboarding**

- *Tenant*: Pays deposit
- *Salesforce*: Handles payment workflow, schedules move-in tasks
- *External*: Payment gateway processes transaction

## **5. Occupancy & Maintenance**

- *Tenant*: Pays rent monthly, logs maintenance requests
- *Property Manager*: Manages issues, updates status
- *Salesforce*: Sends rent reminders, tracks issues in Service Cloud, logs payments
- *External*: ERP/payment sync

## 6. **Renewal or Exit**

- *Salesforce*: Auto-triggers renewal notifications 90/60/30 days before lease end
- *Tenant*: Reviews and renews or prepares to exit
- *Property Manager*: Sends renewal agreements or exit instructions
- *External*: Updated payments, deposit refund systems

## 7. **Post-Lease**

- *Salesforce*: Initiates deposit refund, sends feedback surveys
- *External*: ERP processes refunds
- *Tenant/Property Manager*: Closes tenancy, logs final feedback