IDEATION PHASE

BRAINSTORM & IDEA PRIORITIZATION

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PROJECT NAME: LEASE MANAGEMENT SYSTEM

This guided project demonstrates how to design and implement a Lease Management System within Salesforce. The system helps organizations manage properties, tenants, leases, and payments efficiently using Salesforce automation tools such as Flows, Validation Rules, Approval Processes, and Apex Triggers.

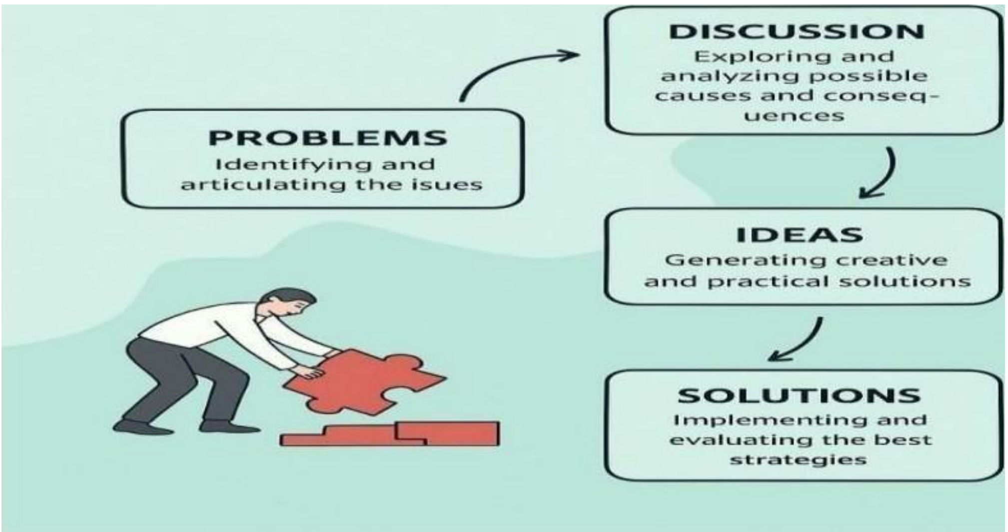
The objective of the project is to build a system that tracks lease agreements, automates rent reminders, and maintains accurate records of tenants and payments. Administrators and property managers can easily manage the complete lease lifecycle — from property listing to tenant management and rent collection — ensuring better transparency and automation.

The workflow includes creating custom objects for Property, Tenant, Lease, and Payment, along with necessary relationships and automations to ensure smooth lease operations.

Step 1: Team Gathering, Collaboration, and Selection of the Problem Statement Lease Management Template Problem Statement:

Managing property leases manually can lead to missing payment deadlines, data inaccuracies, and lack of visibility for property owners and managers. To overcome these challenges, a centralized Salesforce-based Lease Management System is proposed to streamline operations and improve data accuracy.

Step—I : Tear-n Gathering, Collaboration and Selection of the Problern Staternent



Step 2: Brainstorm, Idea Listing, and Grouping

Idea Listing: All suggestions are documented — covering automation, validation rules, reports, and approval processes.

Grouping: Similar ideas are categorized under system design, automation, reporting, and user experience for easy prioritization.

Action Planning: The best ideas are selected, and clear tasks, roles, and timelines are set to guide project execution.

Brainstorming: Team members freely share creative solutions related to property, tenant, lease, and payment management.

Step 3: Idea Prioritization

After brainstorming and grouping, the team evaluates each idea to identify which ones have the highest impact and feasibility for the Lease Management System.

During this stage, all ideas are analyzed based on criteria such as importance, ease of implementation, time required, and potential benefits. The most valuable and achievable ideas — like automating rent reminders, creating validation rules, and building dashboards — are given top priority.

This process helps the team focus on solutions that deliver maximum results with available resources, ensuring that development efforts are efficient and goal-oriented.

1. Identify Property Data Needs
    - Determine what property-related information needs to be managed (e.g., lease dates, tenant details, rent).
    - Helps in structuring the database properly.

2. Create Custom Objects

Set up custom Salesforce objects to store property and lease data. Examples: Property, Lease, Tenant, Payment, etc.

3. Define Relationships

- Link custom objects using lookup or master-detail relationships. Ensures data is connected and easy to track.

4. Add Validation Rules

- Implement validation rules to maintain data accuracy.
- Prevents users from entering incomplete or incorrect details.

5. Automate Lease Processes

Use Flows, Process Builder, or Apex to automate renewals, notifications, and approvals. Saves time and reduces manual work.

6. Generate Reports & Dashboards

● Create visual dashboards and reports for insights on leases, payments, and occupancy. ● Aids in better decision-making.

7. Test and Optimize System

● Test all workflows and make improvements based on feedback. Ensure smooth and efficient performance.