

# 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**.

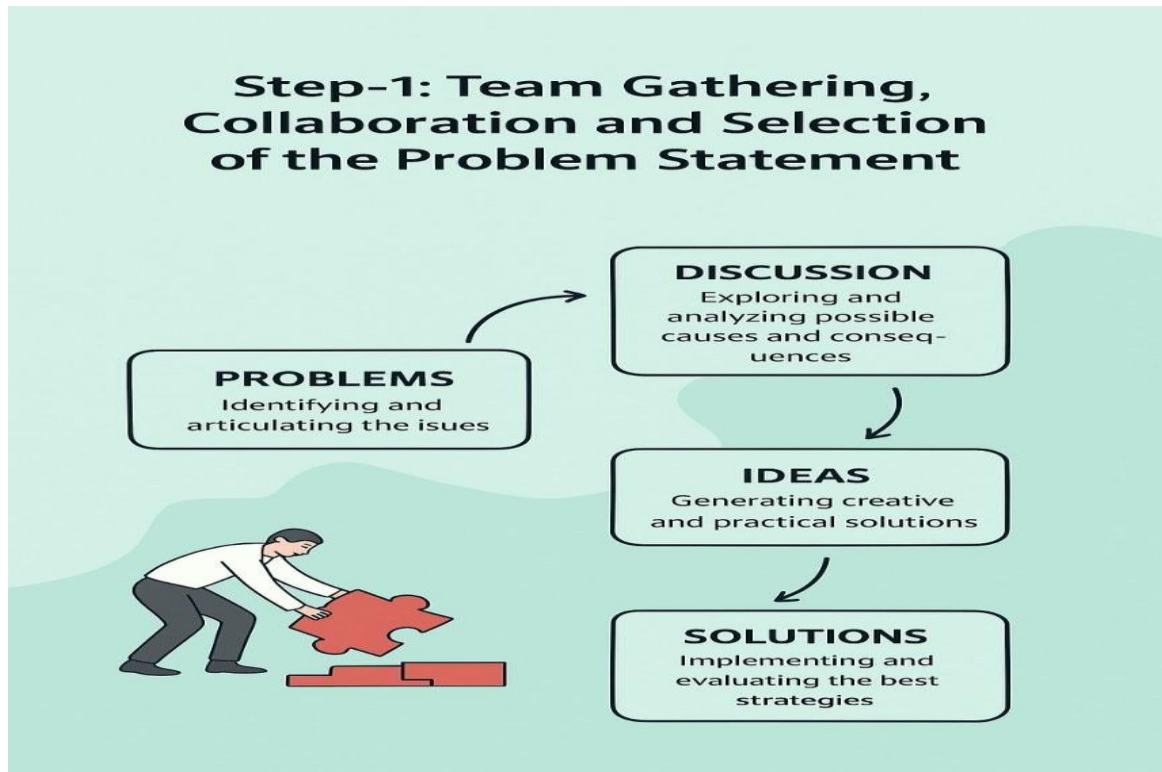
The objective of the project is to build a system that tracks lease agreements, automates rent reminders, and maintains accurate records of tenants and payments. Administrators and property managers can easily manage the complete lease lifecycle — from property listing to tenant management and rent collection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