

PHASE 3 – PROJECT DESIGN PHASE

DATE	03 November 2025
TEAM ID	NM2025TMID06704
PROJECT NAME	LEASE MANAGEMENT SYSTEM
MAXIMUM MARKS	2 Marks

Our proposed system manages lease agreements, properties, and tenants in one place using Salesforce custom objects. It automates important tasks like lease approvals, reminders for lease renewals, and notifications for lease expirations, reducing manual work. Users have role-based access to securely perform their tasks. The system also provides dashboards and reports for easy tracking of lease status and property performance. This makes managing leases faster, more accurate, and easier to monitor.

Key Features:

- **Centralized Lease Database:** Stores all lease details, tenant info, and property data in one place for easy access and updates.
- **Automated Workflows:** Automates lease renewals, approvals, and reminders to reduce manual effort and errors.
- **Role-Based Access:** Ensures secure data access with defined permissions for admins, managers, and tenants.
- **Multi-Level Approval Process:** Streamlines lease approvals with property manager and legal team involvement.
- **Dynamic Email Notifications:** Sends automatic alerts for lease expirations, approvals, and renewals.
- **Interactive Dashboards & Reports:** Provides real-time tracking of lease statuses, occupancy, and financial metrics.
- **Tenant Relationship Management:** Tracks tenant details, communications, and lease interactions for better service.
- **Integration Capabilities:** Connects with payment gateways and accounting systems for seamless financial workflows.

How It Works:

1. **Data Entry:** Users input lease, property, and tenant details into custom Salesforce objects, creating a centralized and unified database.

2. **Approval Workflow:** When a new lease is created or modified, automated workflows route the lease for multi-level approvals (property manager, legal, finance), ensuring compliance and authorization.
3. **Notifications & Reminders:** The system automatically sends email alerts and notifications before lease expirations, renewals, or important deadlines, keeping all stakeholders informed and proactive.
4. **Role-Based Access:** Different users (admins, managers, tenants) access only the data and functions they are authorized for, enhancing security and task delegation.
5. **Monitoring & Reporting:** Dashboards and reports provide real-time insights on lease statuses, occupancy rates, revenue, and upcoming contract actions to support decision-making.
6. **Integration:** The system can integrate with payment processors and accounting software for smooth rent collection and financial tracking.

By automating tasks and centralizing information, this Salesforce solution ensures efficient, transparent, and error-free lease management throughout the lease term.