

## Project Design Phase

### Problem – Solution Fit

Date	25 JUNE 2025
Team ID	LTVIP2025TMID31649
Project Name	Lease Management
Maximum Marks	

### Problem Statement:

Organizations managing multiple property leases struggle with:

- Disjointed lease data across spreadsheets and legacy systems
- Inaccurate or delayed tracking of lease terms, renewals, and expirations
- Manual workflows leading to inefficiencies and errors
- Lack of integration with finance, legal, and sales teams
- Compliance risks due to missing documentation or regulatory deadlines

### Target Users / Stakeholders:

- Lease Managers / Administrators
- Legal and Compliance Teams
- Sales/Account Executives
- Finance/Accounts Payable Teams
- IT/System Admins
- Tenants/Clients (via portals or reports)

### User Needs:

- Centralized and searchable lease repository
- Automated alerts for key dates (e.g., renewals, rent increases)
- Integration with eSignature and document generation
- Reporting dashboards (occupancy, revenue, lease status)
- Mobile-friendly access to lease data
- Secure role-based access to lease records
- Compliance and audit trails

### **Proposed Solution in Salesforce:**

1. Custom Salesforce Objects for Leases, Properties, Tenants, etc. 2.

Automated Workflows for renewals, terminations, and notifications 3.

Document Management Integration with SharePoint or Salesforce Files 4.

Dashboards and Reports using Salesforce CRM Analytics

5. Role-Based Access Control through Salesforce Profiles and Permission Sets

6. Tenant Portal via Salesforce Experience Cloud for real-time updates 7.

Integration with CPQ (if applicable) for lease quote generation

### **Current State vs. Future State:**

<b>Feature</b>	<b>Current (Manual/Legacy)</b>	<b>Future (Salesforce-Based)</b>
Lease Storage	Excel / File Drives	Centralized Salesforce Object
Notifications	Manual Emails	Automated via Flows & Alerts
Reporting	Ad-hoc, error-prone	Real-time, customizable Dashboards

Collaboration Disconnected silos Integrated cross-functional access Compliance

Tracking Manual, reactive Proactive with audit-ready trails

## Tools/Technologies That Can Be Used

- **Salesforce/ServiceNow** – For lease workflow automation and case tracking
- **DocuSign/Adobe Sign** – For digital contract approvals
- **Power BI/Tableau** – For analytics and lease trend dashboards
- **Cloud Storage(AWS/GCP/Azure)** – For centralized document access
- **RPA Tools** – To auto-extract data from legacy systems or PDFs

## Outcome:

INDICATOR	Before (Problem)	After (Solution)
Lease data visibility	Fragmented, inaccessible	Centralized, searchable, and secure
Compliance	Manual and error-prone	Automated and audit-ready
Renewal tracking	Often missed deadlines	Proactive alerts and escalations <del>Seamless and collaborative</del>
Interdepartmental coordination	Delayed and siloed	
Financial accuracy	High risk of overpayment or non-compliance	Precise calculations and reconciliations