

# CUSTOMER JOURNEY MAP- Lease Management

Date	19 JUNE 2025
Team ID	LTVIP2025TMID29234
Project Name	Lease Management
Maximum Marks	

## Benefits for Requirement Analysis:

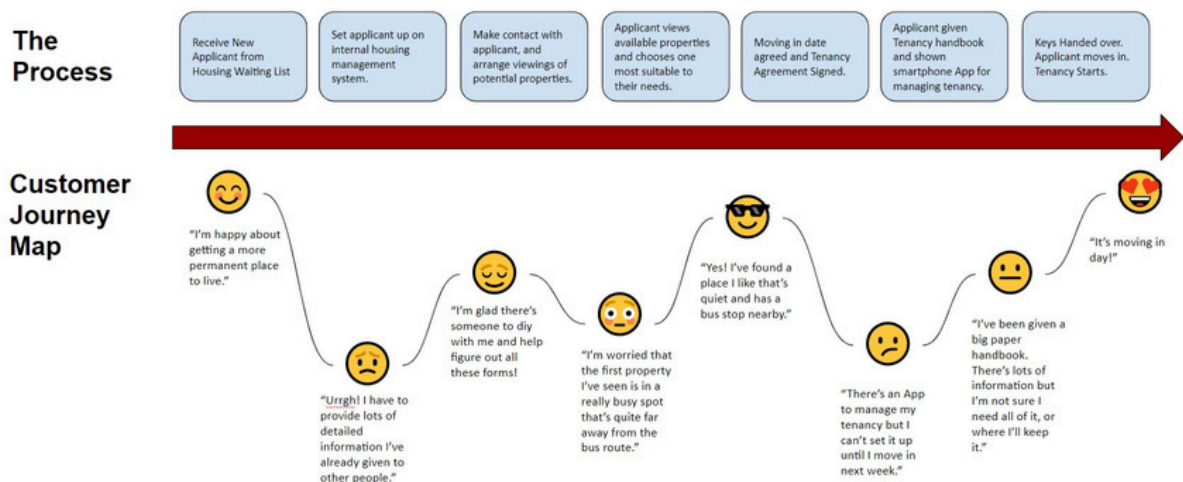
**Role Clarity:** Responsibilities (Tenant, Manager, System, Integrations) are delineated per stage,

**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