PROJECT PLANNING PHASE DOCUMENT

Date	3 August 2025
Team ID	LTVIP2025TMID30830
Project name	Lease management
Maximum Marks	

Project Title:

Lease Management System

🆔 **Team ID:**

LTVIP2025TMID30830

🎇 1. Introduction

The Lease Management System is a Salesforce-based project designed to streamline and automate lease operations for property management. To ensure successful delivery, the project followed a structured planning phase that laid the foundation for development, testing, and implementation.

🎯 2. Objectives of Planning Phase

- Define project scope and requirements

- Identify stakeholders and user roles

- Design the system architecture and data model

- Break down tasks into phases and deliverables

- Establish timelines and testing strategies

- Plan for scalability and future enhancements

👥 3. Stakeholder Identification

Role	Responsibility
Salesforce Admin	Configure objects, validation rules, permissions, UI components
Salesforce Developer	Write Apex code, triggers, flows, and schedule automation
Property Manager (User)	Use the system to manage leases, tenants, and payments

PROJECT PLANNING PHASE DOCUMENT

Role	Responsibility
Project Stakeholders	Review reports and performance metrics, suggest improvements

---

🧱 4. Planning Activities & Phases

◆ **Phase 1: Requirement Analysis**

- Identified the need for automation and real-time data management
- Gathered business requirements for tenants, leases, properties, and payments

◆ **Phase 2: System Design**

- Created custom objects and defined master-detail/lookup relationships
- Designed validation rules and approval workflows
- Outlined UI layout for the Lightning App

◆ **Phase 3: Development Planning**

- Allocated tasks between developers and admins
- Chose Apex and Flows for backend automation
- Scheduled development timelines per module

◆ **Phase 4: Testing Plan**

- Planned test cases for validation, triggers, UI flow, and performance
- Assigned team members to test modules and edge cases

◆ **Phase 5: Deployment Strategy**

- Planned for deployment in Salesforce sandbox
- Final round of user testing before handover
- Documentation and feedback loop setup

⚙️ 5. Tools and Technologies

Component	Technology
Database	Salesforce (custom objects)

PROJECT PLANNING PHASE DOCUMENT

Component	Technology
Automation	Apex Triggers, Flows
Validation	Salesforce Validation Rules
User Interface	Salesforce Lightning App
Communication	Email Templates
Reporting	Dashboards & Reports

📊 6. Outcome of Planning Phase

- Clear system architecture and data model

- Defined user stories and use cases

- Agile breakdown of development and testing tasks

- Risk identification and mitigation strategies

- Ready-to-develop foundation for core modules

sprint	Epic	User story	Task
Sprint-1	Create objects	USN-1	User creat new objects
Sprint-2	Notifications	USN-2	Implement notification system
Sprint-3	Reporting	USN-3	Creat dashboard for tracking
Sprint-4	Logistics	USN-4	Implement logistics scheduling tools

✅ 7. Conclusion

The planning phase laid the essential groundwork for building a robust Lease Management System. Through detailed requirement analysis, role identification, logical system design, and structured scheduling, the team ensured that all technical and functional elements were aligned with the project's business goals. This phase enabled smoother development and faster problem resolution, while ensuring that the system would be scalable, user-friendly, and easy to maintain.

PROJECT PLANNING PHASE DOCUMENT