Customer Journey Map Document

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Team ID	LTVIP2025TMID30830
Project name	Lease management
Maximum Marks	

1.overview:

Here is a **Customer Journey Map** for your **Lease Management Project**, based on the workflows, planning, logic, and outputs from your document. This map illustrates how a typical **property manager or system user** interacts with the lease management system across key stages:

🟦 1. Awareness:

"Recognizing the Need for Automation"
The property management team identifies inefficiencies in manual lease tracking, tenant communication, and rent management. The need for a centralized and automated lease management system becomes clear.

🟩 2. Onboarding

"Accessing the Salesforce Platform"
Users are granted access to the Salesforce Lightning App. Roles and permissions are assigned based on the user type (admin, developer, manager). The user explores the interface and available tabs.

🟧 3. Data Entry & Setup

"Capturing Property and Tenant Records"
Users create entries for properties, tenants, and leases. Data is organized using custom objects with master-detail and lookup relationships. The system ensures accuracy through required fields.

🟧 4. Validation & Approval

"Enforcing Business Rules and Authorizations"
Before a lease is approved, validation rules (like end date > start date) are enforced. Approval processes route lease records to managers for review. Users receive feedback via system emails.

🟥 5. Automation & Notification

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"Letting the System Handle Routine Tasks"
The system automatically sends rent reminders, approval notifications, and rejection emails using predefined email templates and Apex scheduling logic—minimizing manual follow-ups.

🟪 6. Payment Monitoring

"Tracking Rent Payments with Accuracy"
As tenants make payments, managers record them in the system. The Payment object links to tenants and properties. The dashboard reflects paid, pending, or overdue payments.

🟫 7. Review & Reporting

"Gaining Insights from Dashboards"
Managers and stakeholders use real-time dashboards to view lease trends, rent collection, property occupancy, and lease expirations. Reports support decision-making and operational planning.

🟫 8. Renewal or Exit

"Managing the End of the Lease Lifecycle"
As leases approach expiry, notifications prompt action. Managers can offer renewals or mark leases as ended. Tenants can be reassigned or removed from the system accordingly.

🟪 9. Feedback & Enhancement

"Improving the System Based on User Input"
Users share suggestions for improving the system (e.g., adding mobile access, tenant portal, SMS alerts). Developers implement enhancements in future phases, improving the customer journey.

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Customer Journey Map – Lease Management System:

Stage	User Goal	System Interaction	Tools/Features Used	Experience Outcome
1. Onboarding	Get access to the Lease Management App	Logs in to Salesforce, accesses Lightning App tabs	User Profile, Permission Sets, Lightning App	Quick and intuitive access setup
2. Property Setup	Add properties to the system	Creates Property records with address, type, size	Custom Object: Property, Custom Fields	Easy property creation and centralized listing
3. Tenant Entry	Add and assign tenants	Creates Tenant records and links to properties via lookup/master-detail	Custom Object: Tenant, Validation Rules	Properly validated tenant data capture
4. Lease Creation	Create and submit new lease agreements	Enters lease start/end dates, submits for approval	Custom Object: Lease, Validation Rule, Approval Process	Smooth lease onboarding with automated checks
5. Approval & Notification	Approve or reject lease	Manager reviews and approves/rejects lease requests	Approval Workflow, Email Templates	Instant feedback with email alerts
6. Rent Reminder	Notify tenants of due rent	Sends scheduled rent reminders	Apex Scheduled Jobs, Email Templates	Timely and automated reminders
7. Payment Logging	Track payment status	Enters or views tenant payments	Custom Object: Payment, Lookup Relationship	Accurate tracking of rent collection
8. Monitoring	View lease performance, renewals, etc.	Uses dashboards and reports to track leases,	Salesforce Dashboards, Reports	Insightful decision-

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Stage	User Goal	System Interaction	Tools/Features Used	Experience Outcome
		payments, and tenant activities		making via real-time data

Conclusion:

The Lease Management System delivers a smooth and efficient customer journey by automating the entire lease lifecycle—from onboarding and property setup to lease approval, rent collection, and renewal.

By leveraging Salesforce's capabilities such as custom objects, validation rules, approval workflows, and scheduled automation, users experience: