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| **Date** | 3 August 2025 |
| **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**

**"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.

**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, payments, and tenant activities | Salesforce Dashboards, Reports | Insightful decision-making via real-time data |

**Bottom of Form**

**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: