

5. PROJECT PLANNING & SCHEDULING

5.1 Project Objectives

- Develop a centralized Lease Management System on Salesforce.
- Automate lease creation, approvals, rent invoicing, and renewals.
- Create custom objects for Property, Lease, Tenant, and Payment.
- Implement flows and approval processes to streamline tasks.
- Build dashboards and reports for real-time business insights.
- Enhance user experience using Salesforce Lightning interface.

5.2 Project Scope

In Scope:

- Custom object and relationship design (Property, Lease, Tenant, Payment).
- Flow automation for payment reminders and lease expiry.
- Approval process for lease agreement validation.
- Reports and dashboards for lease and payment tracking.
- User interface setup with tabs and list views.

Out of Scope:

- Integration with external payment gateways.
- Mobile application development.
- Tenant self-service portal (unless added later).

5.3 Project Timeline

Week	Milestones
Week 1	- Finalize requirements and user roles - Design data model & relationships - Plan flows & approval
Week 2	- Create custom objects & fields - Build Lightning record pages - Set up app and custom tabs
Week 3	- Configure Flows for rent reminders and expiry - Implement Approval Process - Add validation rules
Week 4	- Create dashboards & reports - Conduct UAT (User Acceptance Testing) - Final deployment & handover

5.4 Resource Allocation

Role	Responsibility
Project Manager	Oversees planning, ensures milestones are met
Salesforce Developer	Builds objects, flows, approvals, and dashboards
QA/User Testers	Runs tests and validates functionality

5.5 Risk Management Plan

Risk	Impact	Mitigation Strategy
Flow errors or logic failures	Medium	Use debug logs and sandbox testing
Late requirement changes	High	Lock scope and review weekly
Delays in approval process	Medium	Configure escalations in approval workflow
Insufficient user training	Medium	Provide demo sessions and training guides

6. FUNCTIONAL AND PERFORMANCE TESTING

6.1 Functional Testing

Functional testing ensures that each feature of the Lease Management system performs as intended. Below are the key functional test scenarios:

Test Case ID	Test Scenario	Expected Result	Status
TC-001	Create a new Tenant record	Tenant record is created and visible in list view	✓ Passed
TC-002	Link a Lease to a Property and Tenant	Lease record links correctly to both	✓ Passed
TC-003	Trigger Lease Approval Process	Approval email sent to manager, status set to Pending	✓ Passed
TC-004	Approve a Lease	Status updates to "Approved", flows are triggered	✓ Passed
TC-005	Generate Payment record monthly	Payment record auto-created before due date	✓ Passed
TC-006	Send rent reminder email	Email received by tenant 3 days before due date	✓ Passed
TC-007	Lease expiry alert	Notification sent 7 days before lease end	✓ Passed
TC-008	Dashboard loads payment report	Correct payment data visible in dashboard	✓ Passed
TC-009	Validation rule on empty lease field	Error message shown if required fields are empty	✓ Passed

6.2 Performance Testing

Performance testing ensures the system responds efficiently under expected usage conditions.

Test Type	Scenario	Expected Result	Status
Load Testing	Load dashboard with 1000+ lease records	Loads within 3 seconds	✓ Passed
Flow Execution	Trigger rent reminder flow for 100 tenants	Emails sent within 1 minute	✓ Passed
Approval Workflow	Process 50 lease approvals in sequence	All processed within 2 minutes	✓ Passed
Record Creation	Bulk import 500 tenants via Data Loader	All records imported successfully	✓ Passed