

4. PROJECT DESIGN

4.1 Problem-Solution Fit

Problem Statement:

Organizations that manage properties or equipment on lease often face challenges in tracking lease agreements, tenant information, payment schedules, and lease renewals using manual or disconnected systems. This results in:

- Data inconsistencies
- Missed payments
- Lack of centralized visibility
- Poor tenant communication

Solution Fit:

There is a critical need for a centralized **Lease Management System** built on the **Salesforce platform** to automate and streamline the lease lifecycle. Salesforce offers a powerful low-code platform that supports custom objects, workflows, and automation tools. This solution aims to:

- Manage tenant records efficiently
- Create and approve lease agreements
- Automate monthly rent invoicing
- Track payments and lease renewals
- Generate real-time reports and dashboards

This centralized system will enhance operational efficiency, reduce manual workload, and improve tenant service quality within the robust Salesforce ecosystem.

Videos



Screen Recording 2025-06-25 144109.mp4

4.2 Proposed Solution

To solve the identified challenges, the Lease Management System in Salesforce will include:

Custom Objects:

- **Tenant:** Stores contact, ID proof, and history.
- **Property:** Captures property info such as location, size, and status.
- **Lease:** Links tenant to property with lease dates, status, and terms.
- **Payment:** Tracks rent amount, due date, status (Paid/Unpaid).

Automation & Flows:

- **Monthly Rent Reminder:** Sends notifications to tenants before due date.
- **Lease Expiry Alerts:** Notifies admin and tenant before lease ends.
- **Validation Rules:** Ensure correct data entry for leases and payments.

Approval Process:

- **Lease Agreement Approval:** Once a new lease is created, it triggers an approval process.
 - Goes to Property Manager for review.
 - Status updates to “Approved” or “Rejected”.
 - Upon approval, related flows (e.g., payment scheduling) are activated.
 - Email alerts are sent to notify stakeholders.

Reports & Dashboards:

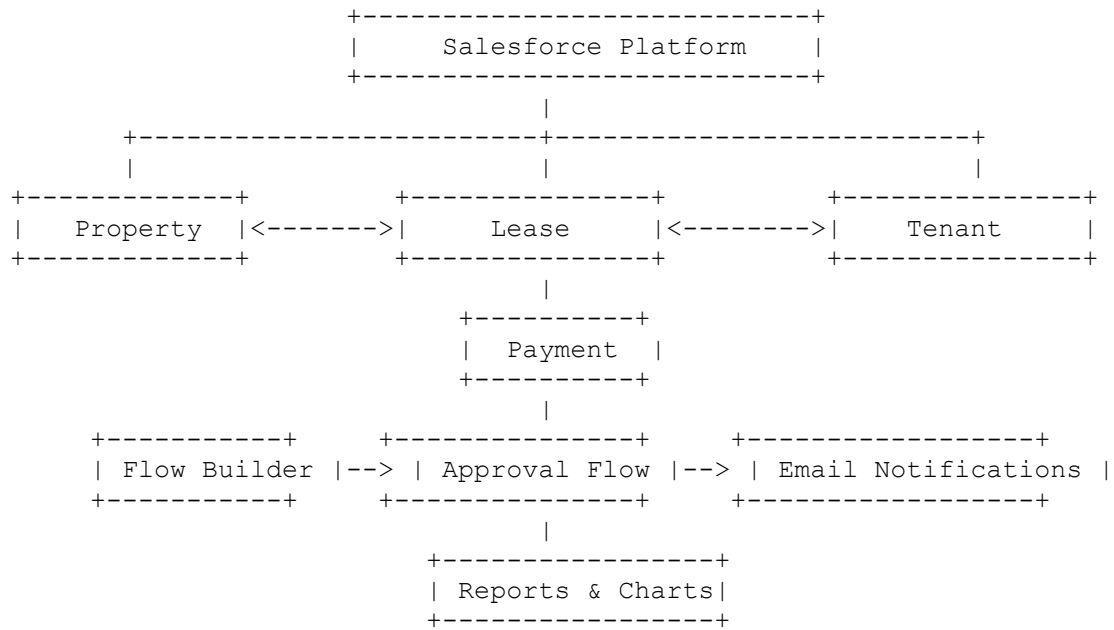
- Lease Status Overview
- Monthly Revenue
- Late Payment Summary
- Lease Renewal Pipeline

User Interface:

- Custom Tabs for Tenant, Property, Lease, Payment
- Lightning Pages for record-level views
- List Views for admin monitoring

4.3 Solution Architecture

The following diagram explains the structure and relationships of the system:



Relationships:

- One Property → Many Leases
- One Tenant → Many Leases
- One Lease → Many Payments

Salesforce Tools Used:

- **Object Manager** for custom objects
- **Flow Builder** for automation
- **Approval Process** for lease validation
- **Lightning App Builder** for user experience
- **Reports & Dashboards** for analytics