2.3 Brainstorming

The brainstorming phase involved identifying key features, components, and processes required to build an effective Lease Management solution in Salesforce. The goal was to understand the problems faced by users and to determine how Salesforce tools (like custom objects, flows, and automation) can be used to solve them.

Key Questions Asked:

- How can we store and manage lease agreements in Salesforce?
- How do we track rent payments and due dates?
- Can we automate monthly rent reminders to tenants?
- How do we handle lease renewals or terminations?
- What kind of dashboards or reports are useful for management?

Ideas Generated:

Idea	Description
Custom Objects	Create custom objects for Lease, Tenant, Payment, Property, and Lease Terms.
Automation with Flows	Use Salesforce Flows to automate rent reminder emails and lease renewal notices.
Scheduled Jobs	Automate monthly invoice generation using scheduled flows or Apex.
Tenant Portal	Provide a self-service portal for tenants to view their lease details and payment history (optional).
Reports & Dashboards	Visual dashboards for admin to track active leases, due payments, and lease expirations.
Validation Rules	Ensure lease records are correctly filled before saving (e.g., mandatory fields like start date, rent amount).
Email Templates	Predefined email formats for payment reminders, lease renewal notices, and welcome messages.
Chatter Integration	Internal collaboration and updates using Salesforce Chatter.

Tools Considered:

- **Salesforce Objects** (Standard + Custom)
- **Process Builder / Flows**
- **Apex (if needed for custom logic)**
- **Reports and Dashboards**
- **Email Alerts**
- **Validation Rules**

Brainstorm & Idea Prioritization Template:

Feature / Idea	Description	Importance (High/Medium/Low)	Feasibility (Easy/Medium/Hard)	Priority (High/Medium/Low)
Custom Objects	Lease, Tenant, Property, Payment, Lease Terms	High	Easy	High
Flow Automation	Automate monthly rent reminders and lease renewals	High	Medium	High
Reports & Dashboards	Visual reports for payments, lease status, and expiry	Medium	Easy	High
Email Templates	Predefined templates for communication (rent, renewal)	Medium	Easy	Medium
Validation Rules	Ensure data integrity in lease and tenant records	High	Medium	High
Scheduled Flows	Monthly invoice creation and notifications	High	Medium	High
Chatter Integration	Internal communication about lease activities	Low	Easy	Low
Tenant Portal (Optional)	Tenants can view details and payment history	Low	Hard	Low
Mobile Compatibility	Access lease details on Salesforce mobile app	Medium	Medium	Medium

Feature / Idea	Description	Importance (High/Medium/Low)	Feasibility (Easy/Medium/Hard)	Priority (High/Medium/Low)
Payment Tracking	Record status of monthly payments	High	Easy	High

## System Design Overview

Objects & Key Fields:

- **Tenant**: Name, Email, Phone, Address
- **Lease**: Lease Name, Tenant (Lookup), Start Date, End Date, Monthly Rent, Status (Active/Expired)
- **Payment**: Lease (Lookup), Payment Date, Amount, Status (Pending/Paid)

Implementation

1. **Create "Lease Management" Lightning App**
   - Include tabs: Tenant, Lease, Payment
     (see App Manager screenshot above)
2. **Define Custom Objects & Fields**
   - Tenant: Name, Email, etc.
   - Lease: link to Tenant, dates, rent, status
   - Payment: link to Lease, amount, status
3. **Build Automation Flows**
   - **Payment Reminder Flow** (Scheduled):
     - Monthly run → email tenants with pending payments
   - **Renewal Alert Flow** (Scheduled):
     - Runs daily → alerts if lease ends in next 30 days
4. **Design Reports & Dashboard**
   - Reports: Active Leases, Expiring Soon, Payment Status
   - Dashboard: Pie chart of lease status, bar chart of monthly rent collection

Screenshots (Sample Images)

- **App Setup in Lightning**
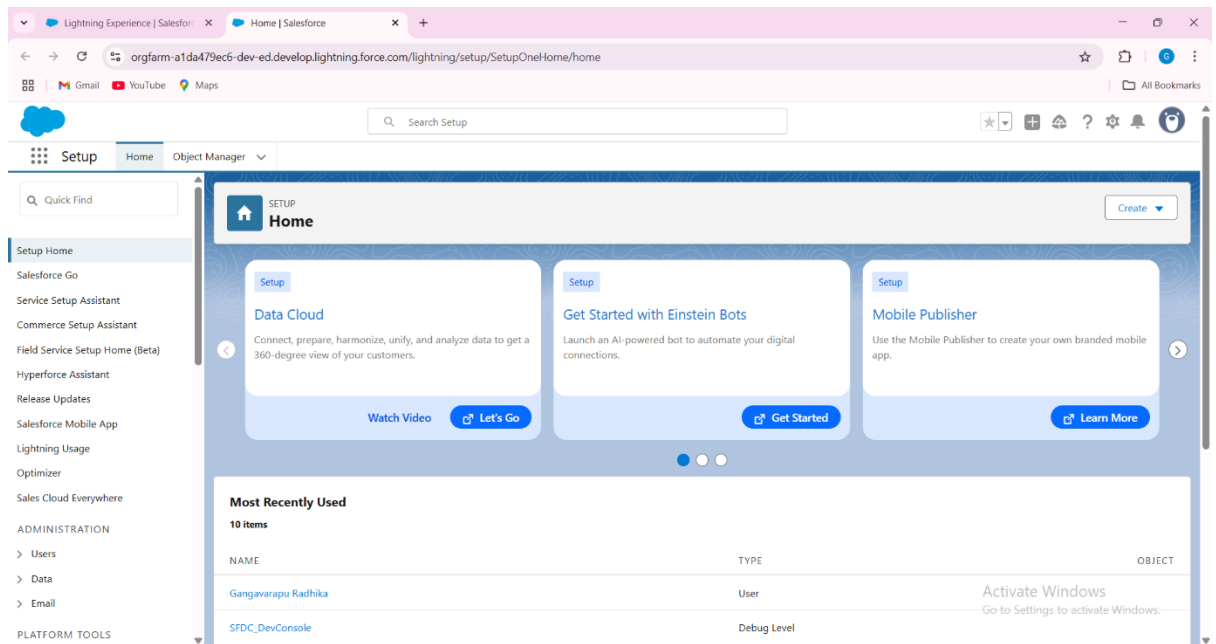
- **Lightning App Builder - Adding Tabs**
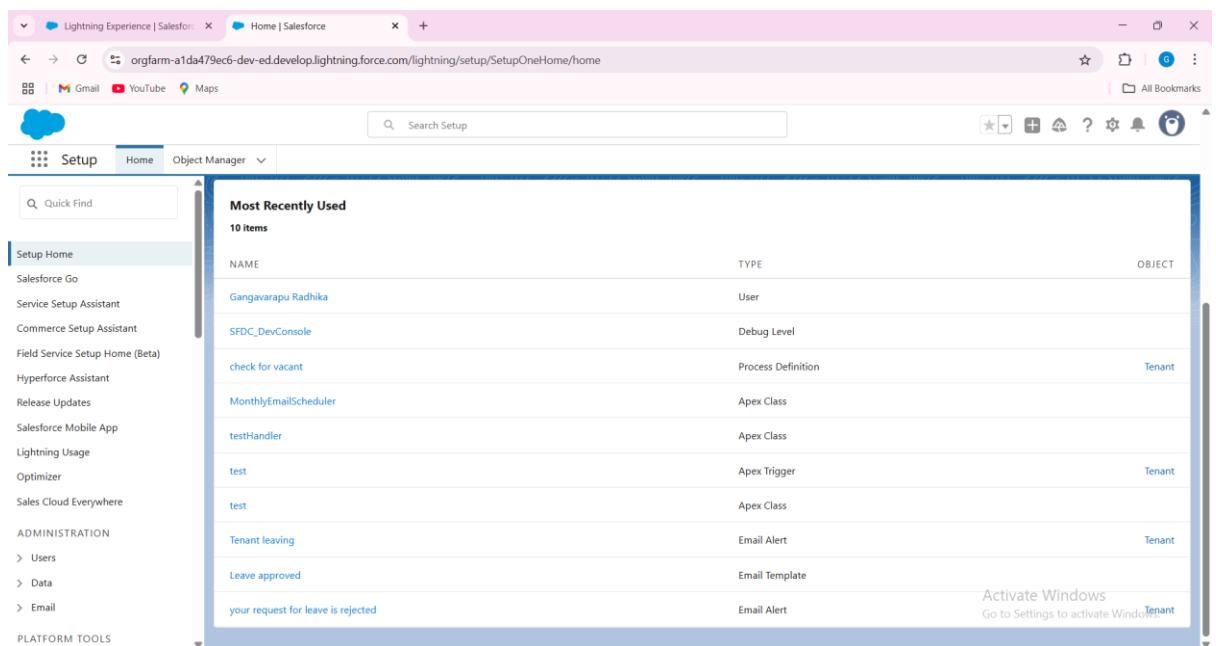
3. REQUIREMENT ANALYSIS

3.1 Customer Journey map

Stage	User Role	Action	System Interaction (Object)	Touchpoint	Outcome
1. Add Property	Admin	Adds a new **Property** with location, type, and rental terms	Property Object	Property Tab	Property inventory is maintained
2. Add Tenant	Admin	Creates a new **Tenant** with personal and contact details	Tenant Object	Tenant Tab	Tenant record is stored
3. Create Lease	Admin	Creates a **Lease** linked to both Tenant and Property	Lease Object (Lookup to Property, Tenant)	Lease Tab	Lease links Tenant to Property
4. Set Payment	Admin/Finance	Creates **Payment** records for lease duration	Payment Object (Lookup to Lease)	Payment Tab	Rent tracking enabled
5. Payment Reminder	Automated Flow	System sends **monthly payment reminder** to Tenant	Flow based on Payment Status	Email / Notification	Tenants are reminded automatically
6. Payment Update	Admin/Finance	Marks Payment as **Paid or Pending**	Payment Object	Payment Record	Payment history stays up to date
7. Lease Expiry	Admin	Updates Lease as **Renewed or Expired**	Lease Object	Lease Record	Lease lifecycle is managed efficiently

3.2 Solution Requirement

Functional Requirements

These are the core capabilities the system **must perform**.

1. **Property Management**