

2. IDEATION PHASE

2.1 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 leads to data inconsistencies, missed payments, lack of centralized visibility, and poor tenant communication.

There is a critical need for a **centralized Lease Management System** built on the **Salesforce platform** to automate and streamline lease lifecycle processes. This includes managing tenant records, creating lease agreements, automating monthly rent invoicing, tracking payment status, handling lease renewals or terminations, and generating insightful reports.

The goal is to enhance operational efficiency, ensure timely payments, reduce manual workload, and provide better service to tenants—all within the robust and customizable Salesforce ecosystem.

2.2 Empathy Map Canvas

Category	Details
Who are we empathizing with?	Property Managers, Lease Administrators, and Tenants
What do they need to do?	- Manage lease agreements efficiently- Track rent payments and due dates- Handle lease renewals or terminations- Communicate clearly with tenants- Generate reports for lease tracking and compliance
What do they see?	- Disorganized lease data- Missed payment alerts- Complex manual processes- Multiple disconnected tools like Excel sheets or offline files
What do they say?	- "It's hard to track who paid and who didn't."- "Renewal deadlines often sneak up on us."- "I wish everything was in one system."- "Tenant communication takes too long."
What do they do?	- Use spreadsheets or manual files- Follow up on payments via calls or emails- Spend time manually updating lease records
What do they hear?	- Feedback from tenants on late reminders or errors- Management demands for accurate reports- Complaints about miscommunication
Pain Points	- Time-consuming data entry- Missed rent payments- Manual follow-ups and renewal tracking- Lack of real-time visibility
Gains	- Centralized lease data in Salesforce- Automated rent reminders- Easy-to-use dashboards- Efficient communication and tracking

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:

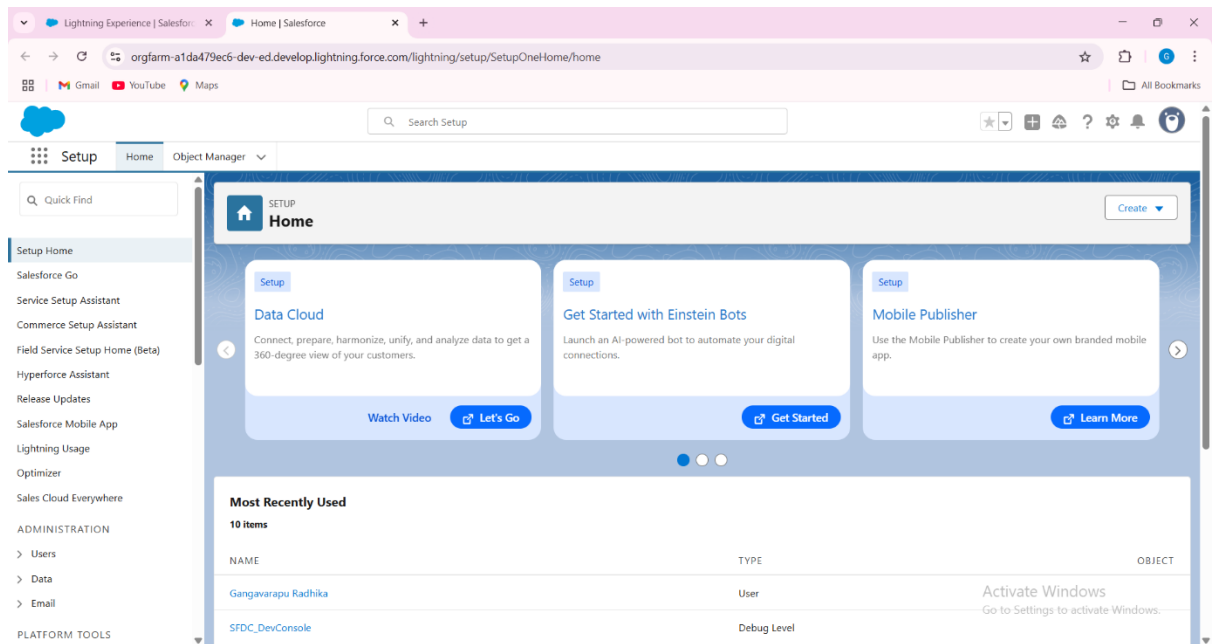
- **Tenant:** Name, Email, Phone, Address
- **Lease:** Lease Name, Tenant (Lookup), Start Date, End Date, Monthly Rent, Status (Active/Expired)
- **Payment:** Lease (Lookup), Payment Date, Amount, Status (Pending/Paid)

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**

