

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