Project Planning Phase
Project Planning

Date	07-11-2025
Team ID	NM2025TMID06244
Project Name	Lease Management

1. Introduction

Project planning defines the roadmap for developing the Lease Management System (LMS) on Salesforce. It outlines timelines, resources, deliverables, risks, and execution strategies to ensure smooth implementation of the system for managing property leases, tenants, payments, and maintenance workflows.

Objectives

Establish a clear execution plan for LMS development

Define system modules, timelines, and responsibilities

Allocate resources and schedule milestones

Identify risks and mitigation strategies

Ensure structured delivery and system quality

2. Project Scope

Module	Deliverables
Property Management	Add, view, edit, categorize properties
Lease Agreement Handling	Create, track, renew, terminate leases
Tenant Management	Store tenant profiles & lease history
Payment & Billing	Schedule rent, reminders, payment logs
Maintenance Request System	Log, track, and close maintenance tickets
Alerts & Notifications	Email/SMS alerts for payments & lease expiry
Reports & Dashboards	Revenue, occupation rate, property health

3. Project Timeline & Milestones

Development Timeline (Agile – Sprint Based)

Phase	Duration	Activities
Requirement Gathering	Week 1	Collect functional & system requirements
System Design	Week 2	Data model, workflows, UI design
Development Sprint 1	Weeks 3–4	Property & Tenant modules
Development Sprint 2	Weeks 5–6	Lease & Payment modules
Development Sprint 3	Week 7	Maintenance & Alerts
Testing	Week 8	Unit, UAT, security & performance
Deployment & Training	Week 9	Production deployment, user onboarding

4. Roles & Responsibilities

Role	Responsibility
Project Manager	Planning, coordination, timeline tracking
Salesforce Developer	Custom objects, automation, Apex flows
Business Analyst	Requirement documentation, user validation
QA Tester	Test cases, bug reporting, quality checks
Admin/User	UAT feedback, real-time validation

5. Resource Plan

Resource Type	Description
Platform	Salesforce CRM
Development Tools	Apex, Flow Builder, Lightning App Builder
Testing Tools	Salesforce sandbox, manual testing scripts
Documentation Tools	Word, Excel, Lucidchart, PowerPoint

6. Deliverables

Deliverable	Description
Custom Salesforce Objects	Property, Lease, Tenant, Payment, Maintenance
UI Components	Lightning Records & Forms
Workflows & Automation	Triggers, flows, notifications
Test Cases & Reports	QA scripts and results
Training Guide	User & admin documentation

7. Conclusion

The Project Planning Phase for the Lease Management System ensures a structured approach to development and delivery. By following agile methodology, assigning clear roles, planning resources, and addressing risks early, the LMS will be delivered efficiently, meeting user needs and improving lease operations, tenant management, and overall system transparency.