

## **PHASE II: PROJECT PLANNING**

<b>Date</b>	06 November 2025
<b>Team ID</b>	NM2025TMID06735
<b>Project Name</b>	Lease Management
<b>Maximum Marks</b>	4 Marks

**Title: Project Planning for “Lease Management”**

---

### **1. Objective**

The Project Planning Phase defines the structural, security, and workflow foundation for the Lease Management system.

Its purpose is to analyse business requirements, identify lease-related entities, plan security levels, and create permission-based access for tenants, owners, and managers within Salesforce.

This phase also outlines logical relationships, user roles, and automation policies to ensure seamless management of property leasing operations.

### **2. Overview of the Planning Process**

The planning phase involves four key components:

<b>Step</b>	<b>Focus Area</b>
1	Defining Core Lease Entities
2	Designing Data & Relationship Model
3	User & Access Role Setup
4	Timeline, Tools & Resource Planning

This ensures smooth lifecycle operations from **property listing → leasing → payment → renewal/termination**.



### 3. Core Entity Identification

The Lease Management application is organized around five main custom objects:

Object Name	Description	Relationships
Property	Represents a commercial or residential space available for lease.	Linked to Lease Agreement
Tenant	Represents the person/company leasing the property.	Linked to Lease Agreement & Payment
Lease Agreement	Captures contract details (duration, rent, deposit).	Master-Detail with Payment
Payment	Tracks rent payments, due dates, and status.	Child of Lease Agreement
Maintenance Request	Records service requests raised by tenants.	Linked to Property & Tenant

This structure enables monitoring of all lease activities from listing → agreement → rent → maintenance.

### 4. Relationship Strategy

Relationship Type	Object Pair	Purpose
Master-Detail	Lease Agreement → Payment	Auto delete payment if lease is deleted

Lookup	Tenant → Property	Allows one tenant to lease multiple properties
Lookup	Maintenance Request → Tenant	Allows tenants to raise service requests
Formula	Payment → Tenant	Pulls tenant name automatically from lease

This data architecture supports automation, dashboards, and record-level security.

## 5. Security and Profile Planning

### 5.1 Custom Profiles Created

Profile Name	Description	Access Level
Tenant Profile	For end users leasing the property	Read-only access on property, create maintenance request
Property Manager Profile	Handles lease contracts & rent tracking	Full CRUD on lease related objects
System Admin	Default admin role	Full access

### 5.2 Public Groups

Public Group	Members	Purpose
Active Tenants	All tenant users	View their own agreements & payments
Property Managers	Admin-level users	Manage all property & lease data

## 6. Data Access and Sharing Rules

Rule Condition	Shared With	Purpose
Lease Status = "Active"	Tenant Group	Shows active lease only to assigned tenant
Payment Status = "Overdue"	Property Managers	Alerts for unpaid rent
Maintenance Urgency = "High"	Property Managers Group	Fast escalation of urgent issues

- Ensures tenants view only their own data
- Managers see full portfolio for decision-making

## 7. User Creation and Role Assignment

### 7.1 Procedure

1. Setup → Users → New User
2. Assign **Salesforce Platform License** for tenants
3. Assign **Salesforce License** for managers
4. Configure profile & public group membership
5. Relate users to properties (via lookup/custom field)

## 7.2 User Hierarchy

Role	Assigned Profile	Group	Access Level
Property Manager	Property Manager Profile	Property Managers	Full Access
Tenant	Tenant Profile	Active Tenants	Limited Access
System Admin	Admin Profile	N/A	Full Control

## 8. Environment Setup and Configuration

Steps completed:

- Developer Edition created from Salesforce signup link
- Enabled Lightning App Experience
- Created app alias: **Lease Management**
- Added custom tabs for Property, Tenant, Lease Agreement, Payment
- Enabled Flow Builder, Reports, and Dashboard tools
- Configured branding & logo for property portal

## 9. Project Timeline and Resource Plan

Phase	Duration	Key Deliverables
Ideation	2 Days	Problem Study, Use Cases
Planning	3 Days	ERD, Profiles, Sharing Rules
Requirement Analysis	4 Days	Field & Object Setup
Design & Implementation	5 Days	Automation, UI Pages
Testing & Deployment	2 Days	Validation, User Testing

## **10. Tools and Resources Used**

<b>Tool</b>	<b>Purpose</b>
Lightning App Builder	UI Pages
Flow Builder	Rent automation & notifications
Apex Trigger	Auto-calc overdue days
Dashboard Builder	Rent due & occupancy reports
Schema Builder	Object mapping
SmartInternz	Submission & Mentorship

## **11. Expected Outcomes of the Planning Phase**

- Data model finalized for property, leasing, payments
- User roles and sharing configured
- Secure Salesforce environment set up
- Automation and reporting structure defined
- Clear roadmap prepared for development & deployment

## **12. Summary**

The Project Planning Phase creates the blueprint for implementing the Lease Management system. It ensures a structured, secure, and scalable approach to manage the entire leasing lifecycle using Salesforce.

By establishing roles, access models, and object relationships early, the project is ready to transition into **Requirement Analysis and Implementation phases** with clarity and confidence.