

PHASE II: PROJECT PLANNING

Date	06 November 2025
Team ID	NM2025TMID06186
Project Name	Lease Management
Maximum Marks	4 Marks

Title: Project Planning for “Lease Management”

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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:

Step	Focus Area
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

Tool	Purpose
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.