Ideation Phase

Brainstorm & Idea Prioritization

Date: 2 November 2025
Team ID: NM2025TMID01082
Project Name: Lease Management System in Salesforce
Maximum Marks: 4 Marks

Lease Management System in Salesforce Template

This guided project demonstrates how to develop a Salesforce-based Lease Management System to efficiently manage and track property lease operations. It focuses on automating lease creation, payment reminders, property details, and tenant information in a centralized platform.

The application aims to streamline lease workflows, reduce manual errors, and ensure timely rent collection through automation. Using Salesforce features like objects, record-triggered flows, and dashboards, this project ensures transparency and better communication between property owners and tenants.

The workflow begins by creating records for Properties, Tenants, Lease Agreements, and Payments. Relationships between these records are defined using lookups to ensure data consistency. Automation is implemented through flows, validation rules, and triggers to manage payments and renewals automatically.

A Salesforce dashboard and reports are built to provide real-time insights into lease statuses, payment trends, and upcoming renewals, helping landlords make informed decisions.

Step-1: Team Gathering, Collaboration and Problem Selection

The team collaborated to identify challenges in traditional lease management processes. Manual tracking of lease terms, rent due dates, and renewals often leads to errors, missed payments, and delays in communication.

After detailed discussions, the problem of inefficient manual lease tracking and rent management was selected. By developing an automated Salesforce solution, the project ensures secure, accurate, and efficient lease management with minimal manual effort.

Step-2: Brainstorming, Idea Listing, and Grouping

Brainstorm:
Team members shared ideas on lease automation, rent tracking, tenant management, and notification systems.

Idea Listing:
Ideas included automated rent reminders, digital lease records, real-time dashboards, and secure data storage in Salesforce.

Grouping:
Ideas were organized under categories — **Automation**, **Tracking**, and **Reporting** — to focus on specific functional areas of lease management.

Action Planning:
Tasks were divided among team members to create Salesforce objects, define relationships, build flows for reminders, and develop report dashboards for payments and renewals.

Step-3: Idea Prioritization

Idea prioritization helped focus on the most impactful features for efficient lease management.

Top priorities included:

- Automated Lease Agreement Creation
- Rent Reminder Notifications
- Real-Time Lease and Payment Dashboard
- Secure Tenant and Property Management
- Renewal Tracking and Report Generation

By focusing on these features, the Lease Management System ensures accurate lease tracking, on-time payments, and improved coordination between landlords and tenants. The Salesforce platform enhances automation, transparency, and data accuracy for a seamless leasing experience.