Ideation Phase Brainstorm & Idea Prioritization Template

Date	01-11-2025
Team ID	NM2025TMID06722
Project Name	Lease Management System using Salesforce

The goal of this project is to design and implement a robust lease management solution using Salesforce. The system will streamline the handling of property, tenant, lease, and payment records, automate processes, enable clear communication, and enforce business rules in a real estate context.

Step 1: Team Gathering, Collaboration, and Select the Problem Statement

Problem Statement:
Manual lease management processes lead to inefficiencies, missed payments, lack of timely communication, and increased risk of compliance errors. The team aims to build a digital solution to automate and optimize these operations.

Step 2: Brainstorm, Idea Listing, and Grouping

Idea Listing:

1. Create custom objects: Implement Property, Tenant, Lease, and Payment objects to model business data.

2. Automate validations: Use validation rules (e.g., end date must be greater than start date in lease).

3. Email automation: Design email templates and workflows for payment reminders, leave approvals, and rejection notifications.

4. Approval process: Automate leave approval/rejection for tenants using Salesforce approval workflows.

5. Apex Triggers and Schedulers: Develop triggers to enforce business rules (e.g., tenant can only have one property) and schedule email reminders using Apex classes.

6. Flows: Create Salesforce Flows for automating tasks like sending payment confirmation emails when a payment status is updated.

7. User Interface: Build custom tabs and a Lightning App for intuitive access to all objects and records.

8. Reporting and Security: Implement dashboards, field history tracking, and access controls.

Mind mapping for LEASE MANAGEMENT SOLUTION

Grouping

- Data Structure: Custom objects, fields & lookup/master-detail relationships.

- Automation & Logic: Validation rules, Flows, Triggers, Approval processes.

- Communication: Email templates, scheduled emails.

- Access Management: App creation, tab customization, security settings.

Step 3: Idea Prioritization

Highest Priority:

- Designing property, tenant, lease, and payment objects with relationships and validations.

- Automating monthly payment reminders and approval notifications.

- Implementing error handling and messaging for business logic constraints (e.g., only one property per tenant).

Medium Priority:

- Building dashboards for management insights.

- Adding user prompts and confirmations before record deletion.

Lowest Priority:

- Advanced reporting and multi-channel notifications (future enhancement).

Step 4: Action Planning

1. Data Modeling: Create all required objects and relationships as per business needs.

   - *Responsible:* Salesforce Admin/Developer

   - *Timeline:* [Insert timeline]

2. Automation Implementation: Develop and test validation rules, Flows, Triggers, Apex Classes for scheduling emails.

   - *Responsible:* Developer

   - *Timeline:* [Insert timeline]

3. Communication Setup: Design all needed email templates for leave requests, approvals, rejections, payment reminders, and confirmations.

   - *Responsible:* Salesforce Admin

   - *Timeline:* [Insert timeline]

4. Approval Workflow: Configure approval process for tenant leave status and integrate email alerts.

   - *Responsible:* Salesforce Admin

   - *Timeline:* [Insert timeline]

5. User Experience: Build Lightning App, tabs, and custom layouts for easy navigation and access.

   - *Responsible:* Admin/UX Designer

   - *Timeline:* [Insert timeline]

6. Testing and Validation: Validate all automations, conduct test scenarios for both successful and failed processes (e.g., duplicate tenant-property assignment).

   - *Responsible:* QA/Developer

   - *Timeline:* [Insert timeline]

7. Documentation: Document test scenarios, workflow, error messages, and user guides.

   - *Responsible:* Team Lead

   - *Timeline:* [Insert timeline]

Visual Diagrams/Flowcharts

- Object relationships

- Automation flows (triggered emails, approval steps)

- User navigation (Lightning App structure)

Summary:

This document details a systematic Salesforce-based approach for lease management automation, transforming manual operations into streamlined, error-resistant digital workflows for enhanced property and tenant management.