

Project Title: Real Estate Property Management System

Phase 4 – Process Automation

Objective

Automate key business processes in Salesforce to reduce manual work, ensure consistency, and notify users of important changes. In my project, this included updating property status, sending email alerts, and creating follow-up tasks whenever a lease is activated.

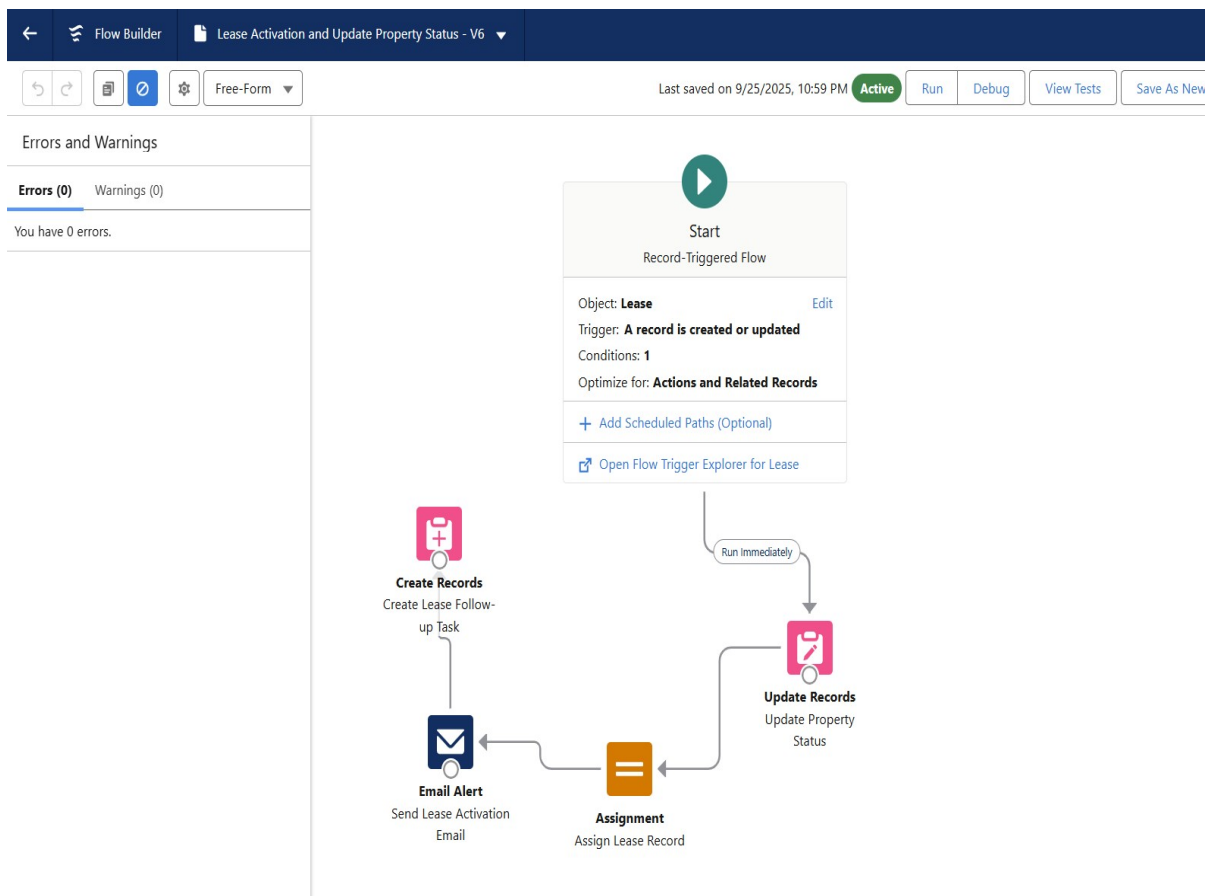
Acceptance Criteria

- Lease status updates automatically when a lease is activated.
- Lease owners receive email notifications upon activation.
- Follow-up tasks are automatically created for Lease Owners.
- All automation works without errors, and data consistency is maintained.

A. Flow Builder – Lease Activation Flow

Step 1: Record-Triggered Flow

- **Object:** Lease__c
- **Trigger:** When a record is **created or updated**
- **Entry Condition:** Lease Status = Active
- **Optimization:** Run flow **after the record is saved**



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Step 2: Update Property Status

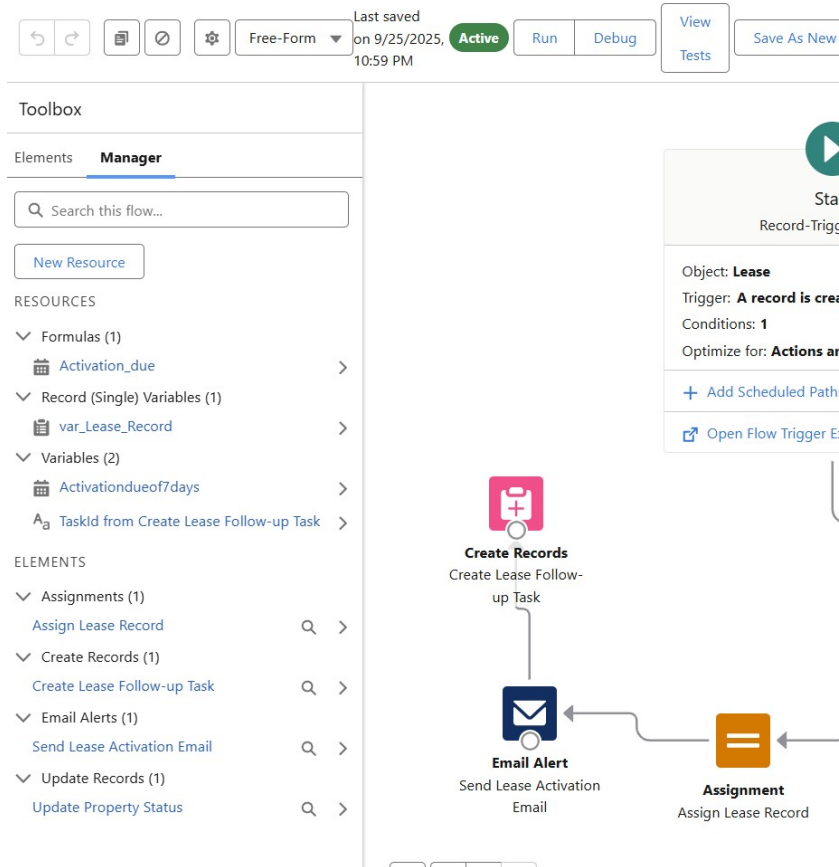
- **Element Type:** Update Records
- **Label:** Update Property Status
- **API Name:** Update_Property_Status
- **How to Find Records to Update:** Records related to Lease
- **Filter Condition:**
 - Status = Available (or all related properties)
- **Set Field Values:**
 - Status = Occupied

<div><div><div><div><div></div><div>Properties</div></div><div><div>All</div><div></div></div></div><div>7 items • Sorted by Property ID • Updated a few seconds ago</div></div><div><div>New</div><div>Import</div><div>Change Owner</div><div>Printable View</div><div>Assign Labels</div></div><div><div><div>Q</div><div>Search this list...</div></div><div><div></div><div></div><div></div><div></div><div></div></div></div></div>				
<input type="checkbox"/>	Property ID ↑	Status	Record Type	Record ID
1	<input type="checkbox"/> PROP-0001	Occupied	Residential Property	a00fj00000
2	<input type="checkbox"/> PROP-0002	Occupied	Residential Property	a00fj00000
3	<input type="checkbox"/> PROP-0003	Occupied	Residential Property	a00fj00000
4	<input type="checkbox"/> PROP-0004	Under Maintenance	Residential Property	a00fj00000
5	<input type="checkbox"/> PROP-0005	Occupied	Commercial Property	a00fj00000
6	<input type="checkbox"/> PROP-0006	Occupied	Commercial Property	a00fj00000
7	<input type="checkbox"/> PROP-0007	Occupied	Commercial Property	a00fj00000

Step 3: Assign Lease Record to Variable

- **Create Variable:** var_Lease_Record
 - **Data Type:** Record
 - **Object:** Lease__c
 - **Available for Input:** Checked
- **Assignment Element:** Assign \$Record to var_Lease_Record

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Step 4: Email Alert – Notify Lease Owner

- **Element Type:** Action → Email Alert
- **Label:** Send Lease Activation Email
- **API Name:** Send_Lease_Activation_Email
- **Email Alert Selected:** Notify Lease Owner on Lease Activation
- **Input Value:** Record = var_Lease_Record
- **Recipient Type:** Owner (Lease Owner)

The screenshot shows the 'Email Alerts' setup page in a system. The page has a sidebar with navigation links like 'Setup', 'Home', 'Object Manager', 'Users', 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', 'Users', 'Feature Settings', and 'Data.com'. The main content area is titled 'Email Alerts' and shows details for an 'Email Alert' named 'Notify Lease Owner on Lease Activation'. It includes fields for 'Description', 'Unique Name', 'From Email Address', 'Recipients', 'Additional Emails', 'Email Template', 'Object', 'Created By', and 'Modified By'. Below this, there are sections for 'Rules Using This Email Alert', 'Approval Processes Using This Email Alert', 'Entitlement Processes Using This Email Alert', and 'Flows Using This Email Alert'. The 'Flows Using This Email Alert' section shows a table with columns for 'Flow Name', 'Version', 'Description', 'Object', and 'Active'.

Flow Name	Version	Description	Object	Active
Lease Activation and Update Property Status	4, 5, 6		011f000002p2x4F	✓

Step 5: Create Follow-Up Task

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- **Element Type:** Create Records
- **Label:** Create Lease Follow-up Task
- **API Name:** Create_Lease_Followup_Task
- **Object:** Task
- **Field Values:**

Field	Value	Notes
Subject	Follow-up on Lease Activation	Text
Status	Not Started	Picklist
Priority	High	Picklist
WhatId	{!\$Record.Id}	Link Task to Lease
OwnerId	{!\$Record.OwnerId}	Assign to Lease Owner
Due Date	TODAY() + 7	7 days from activation

Real Estate Manage...OwnersPropertiesTenantsLeasesReportsDashboardstrue

Tasktrue

Mark CompleteEdit CommentsChange DateCreate Follow-Up Task

Name

Related ToLEASE-0008

Details

Related

Assigned ToDharma Teja Garipally

Subjecttrue

Due Date10/2/2025

PriorityHigh

Created ByDharma Teja Garipally, 9/25/2025, 10:32 AM

Comments

StatusNot Started

Name

Related ToLEASE-0008

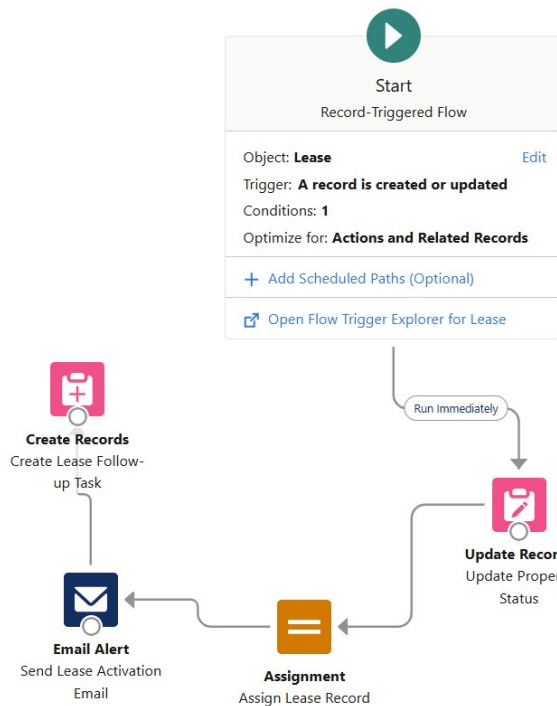
Last Modified ByDharma Teja Garipally, 9/25/2025, 10:32 AM

Step 6: Connect Flow Elements

Flow Path:

Start → Update Property Status → Assign Lease Record → Send Lease Activation Email → Create Lease Follow-up Task → End

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Step 7: Testing

1. Create or update a Lease with **Status = Active**.
2. Verify **Property status updates** automatically.
3. Check **Email inbox** of Lease Owner for the activation alert.
4. Verify **Follow-up task** appears in Task tab for Lease Owner.

(Screenshot of sample Lease record, email received, and created task goes here)

Deliverables

- Flow: Lease Activation Flow (with all elements)
- Email Template: Lease_Activation_Alert
- Screenshots of Flow, Sample Lease Record, Email Alert, Follow-up Task