Salesforce Project Report

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Project Title: Lease Management System for Real Estate

Platform: Salesforce

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1. Introduction

This project is a simplified Lease Management System built on Salesforce, designed to manage real estate leases. It allows users to track lease agreements, manage tenant records, property details, automate lease renewal reminders, and monitor lease status through reports and dashboards.

2. Objectives

- Manage real estate properties and their lease agreements

- Automate reminders for lease end dates

- Store tenant details and link them to properties

- Track active, upcoming, and expired leases

3. Modules

3.1 Property Object

Fields: Property Name, Address, Type (Commercial/Residential), Status

3.2 Tenant Object

Fields: Tenant Name, Email, Phone Number

3.3 Lease Object

Fields: Lease ID, Property (Lookup), Tenant (Lookup), Start Date, End Date, Rent Amount, Lease Status

Relationship: Each lease is linked to one tenant and one property.

4. Automation (Using Salesforce Flow)

A scheduled flow is used to check if a lease is ending within 10 days and automatically sends an email reminder to the property manager. This ensures timely renewal and helps prevent lease lapses.

5. Reports and Dashboards

- Report: Active Leases

- Report: Expiring Leases in Next 30 Days

- Dashboard: Lease Status Overview

6. Conclusion

The Lease Management System simplifies the tracking and automation of real estate leasing processes using Salesforce. This project is efficient for managing lease data, automating tasks, and providing clear visual reports for decision making.