

Project Planning Phase

Date	02 November 2025
Team ID	NM2025TMID04536
Project Name	Lease Management
Maximum Marks	5 Marks

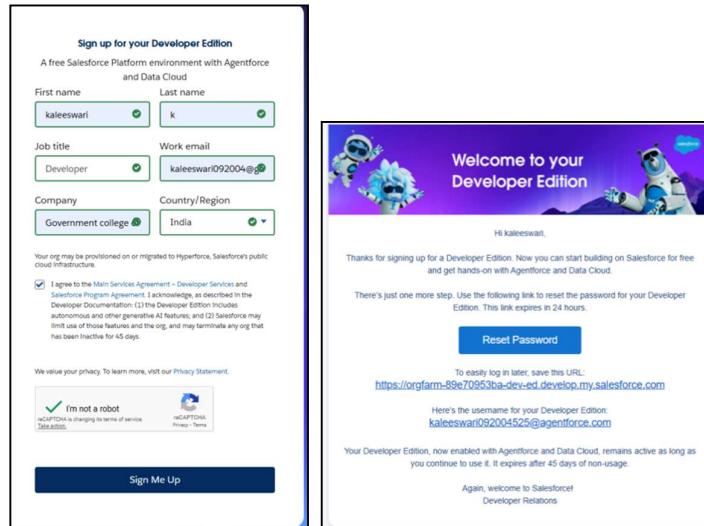
1. Project Milestones & Tasks

The project was executed in multiple milestones, where each milestone focused on a major functional area — from creating Salesforce objects to developing automation and approval workflows.

Milestone No.	Phase / Task	Key Activities Performed	Output
M1	Salesforce Environment Setup	Created Salesforce Developer Account and Configured Developer Console	Development environment successfully set up
M2	Object Creation	Created 4 Custom Objects: Property, Tenant, Lease, Payment for Tenant using Object Manager	Objects created and linked to database schema
M3	Custom Tabs & App Setup	Created Tabs for each object and built a Lightning App named "Lease Management" with navigation menus	Fully functional Lease Management Lightning App
M4	Field Configuration	Added various Fields and Data Types for each object: Property → Name, Address, Type, Sqft Tenant → Email, Phone, Status Lease → Start Date, End Date Payment → Payment Date, Amount, Status	All objects now contain structured data fields ready for input

M5	Relationship & Validation Setup	Created Lookup and Master-Detail Relationships between Property, Tenant, Lease, and Payment objects Added Validation Rule for Lease Object (End_Date > Start_Date)	Data relationships and rules successfully enforced
M6	Email Templates Creation	Designed 5 Classic Email Templates for automated communication: Tenant Leaving Leave Approved Leave Rejected Monthly Payment Reminder Payment Success	Email templates saved and available for automation
M7	Approval Process Implementation	Created Approval Process “Check for Vacant” for Tenant Object to approve or reject tenant leaving requests	Configured automated approval workflow with email alerts for each outcome
M8	Apex Trigger & Handler Development	Wrote and tested Trigger (test) and Handler Class (testHandler) to prevent multiple tenants per property	Data validation logic automated using Apex
M9	Flow & Scheduled Apex	Built a Record-Triggered Flow for monthly payment confirmation Created and Scheduled Apex Class (MonthlyEmailScheduler) for monthly payment reminders	Payment flow automation and scheduled monthly reminder email achieved
M10	Testing & Debugging	Verified all functionalities — Email alerts, Approval processes, Triggers, Flows, and Apex Classes	All modules working successfully
M11	Deployment & Documentation	Documented all steps and screenshots for the final report	Final working Salesforce-based Lease Management System

Salesforce Environment Setup:



Salesforce Developer Edition environment setup and workspace initialization for the Lease Management System

Object Creation

The screenshot shows the Salesforce Object Manager interface under the SETUP tab. The page displays a list of objects:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Tenant	Tenant__c	Custom Object		10/27/2025	✓
Payment for tenant	Payment_for_tenant__c	Custom Object		10/27/2025	✓
property	property__c	Custom Object		10/27/2025	✓
lease	lease__c	Custom Object		10/26/2025	✓
Work Type Group Member	WorkTypeGroupMember	Standard Object			
Work Type Group	WorkTypeGroup	Standard Object			
Work Type	WorkType	Standard Object			
Work Step Template	WorkStepTemplate	Standard Object			
Work Step	WorkStep	Standard Object			
Work Plan Template Entry	WorkPlanTemplateEntry	Standard Object			

Creation of custom objects (Property, Tenant, Payment, Lease) to structure and store lease-related data

Custom Tabs

The screenshot shows the Salesforce Tabs configuration page under the SETUP tab. The page displays a list of custom tabs:

Action	Label	Tab Style	Description
Edit Del	base	Ticket	
Edit Del	Payment	Moon	
Edit Del	property	Helicopter	
Edit Del	Tenants	Star	

Configuration of custom tabs

App Setup

New Lightning App

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

*App Name

*Developer Name

Description

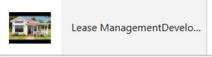
App Branding

Image

Primary Color Hex
Value

Org Theme Options
 Use the app's image and color instead of the org's custom theme

App Launcher Preview



Next

New Lightning App

App Options

Navigation and Form Factor

*Navigation Style
 Standard navigation
 Console navigation

*Supported Form Factors
 Desktop and phone
 Desktop
 Phone

Setup and Personalization

Setup Experience
 Setup (full set of Setup options)
 Service Setup
 Data Cloud Setup

App Personalization Settings
 Disable end user personalization of nav items in this app
 Disable temporary tabs for items outside of this app
 Use Omni-Channel sidebar

Back Next

New Lightning App

Navigation Items

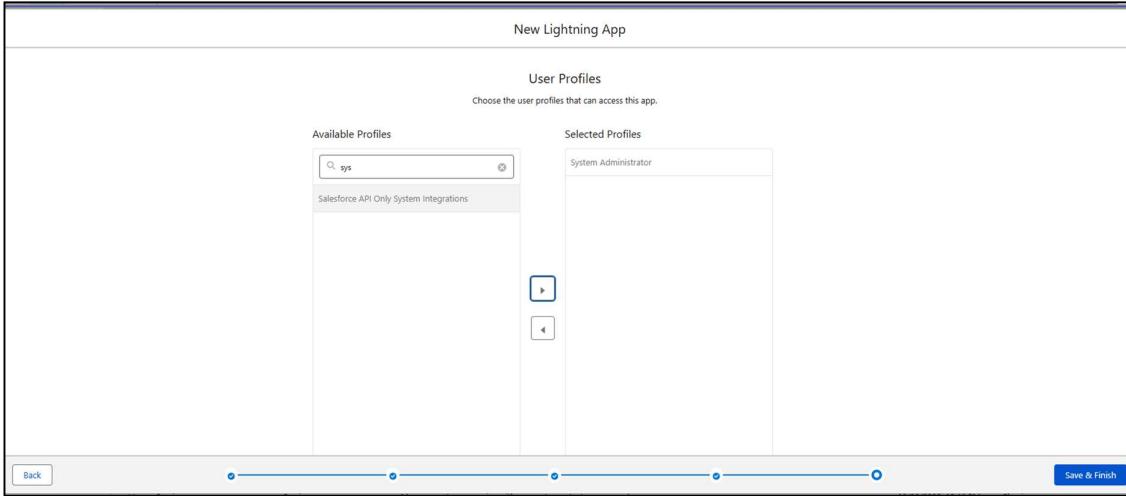
Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items

Selected Items

Icon	Item
Payment	Payment
Tenants	Tenants
property	property
lease	lease

Back Next



Dedicated Lease Management application for easy navigation within Salesforce

Field Configuration

SETUP > OBJECT MANAGER property						
Fields & Relationships		Fields & Relationships				
		FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts		Address	Address__c	Long Text Area(32768)		
Lightning Record Pages		Created By	CreatedById	Lookup(User)		
Buttons, Links, and Actions		Last Modified By	LastModifiedById	Lookup(User)		
Compact Layouts		Name	Name__c	Text(25)		
Field Sets		Owner	OwnerId	Lookup(User,Group)		✓
Object Limits		property Name	Name	Text(80)		✓
Record Types		sft	sft__c	Text(10)		
Related Lookup Filters		Type	Type__c	Picklist		
Search Layouts						
List View Button Layout						
Restriction Rules						
Scoping Rules						
Object Access						
Triggers						
Flow Triggers						
Validation Rules						
Conditional Field Formatting						

Creation of fields for the property object

SETUP > OBJECT MANAGER Tenant						
Fields & Relationships		Fields & Relationships				
		FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts		Created By	CreatedById	Lookup(User)		
Lightning Record Pages		Email	Email__c	Email		
Buttons, Links, and Actions		Last Modified By	LastModifiedById	Lookup(User)		
Compact Layouts		Phone	Phone__c	Phone		
Field Sets		property	property__c	Master-Detail(property)		✓
Object Limits		status	status__c	Picklist		
Record Types		Tenant Name	Name	Text(30)		✓
Related Lookup Filters						
Search Layouts						
List View Button Layout						
Restriction Rules						
Scoping Rules						
Object Access						
Triggers						
Flow Triggers						
Validation Rules						
Conditional Field Formatting						

Creation of fields for the tenant object

Fields & Relationships					
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Amount	Amount_c	Number(18, 0)		
Lightning Record Pages	Check for payment	Check_for_payment_c	Picklist		
Buttons, Links, and Actions	Created By	CreatedBy	Lookup(User)		
Compact Layouts	End Date	End_Date_c	Date		
Field Sets	Last Modified By	LastModifiedBy	Lookup(User)		
Object Limits	lease Name	Name	Text(80)		
Record Types	Owner	OwnerId	Lookup(User, Group)		
Related Lookup Filters	Payment Date	Payment_Date_c	Date		
Search Layouts	property	property_c	Lookup(property)		
List View Button Layout	Start Date	Start_Date_c	Date		
Restriction Rules					
Scoping Rules					
Object Access					
Triggers					
Flow Triggers					
Validation Rules					
Conditional Field Formatting					

Creation of fields for the lease object

Fields & Relationships					
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Amount	Amount_c	Number(18, 0)		
Lightning Record Pages	check for payment	check_for_payment_c	Picklist		
Buttons, Links, and Actions	Created By	CreatedBy	Lookup(User)		
Compact Layouts	Last Modified By	LastModifiedBy	Lookup(User)		
Field Sets	Payment date	Payment_date_c	Date		
Object Limits	Payment Name	Name	Text(80)		
Record Types	property	property_c	Master-Detail(property)		
Related Lookup Filters	Tenant	Tenant_c	Lookup(Tenant)		
Search Layouts					
List View Button Layout					
Restriction Rules					
Scoping Rules					
Object Access					
Triggers					
Flow Triggers					
Validation Rules					
Conditional Field Formatting					

Creation of fields for the Payment for tenant object

Relationship & Validation Setup

Validation Rules					
	RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
	lease_end_date	Start Date	Your End Date must be greater than Start Date	✓	kaleeswari k, 10/26/2025, 11:56 PM

Email Templates Creation

The screenshots show the 'Email' section in the Salesforce Setup. On the left, under 'Classic Email Templates', there is a list of templates including 'tenant_leaving', 'tenant_email', and 'tenant_payment'. On the right, another list of templates is shown, including 'Leave_approved' and 'Leave_rejected'. Both screens include search bars, navigation menus, and standard Salesforce UI elements.

Approval Process Implementation

The screenshot shows the 'Approval Processes' page in the Salesforce Setup. It details a process named 'check for vacant' with the unique name 'check_for_vacant'. The process is active and set to determine the next automated approver. It includes initial submission actions (Record Lock, Email Alert) and approval steps (Submit for approval). The process is created by 'Kaleeswari k' on 10/27/2025 at 9:53 PM and modified by 'Kaleeswari k' on 11/1/2025 at 11:18 PM.

Apex Trigger & Handler Development

The screenshots illustrate Apex trigger development. The left screenshot shows a 'Lease Management' record with a 'property' field containing 'manne residency'. The right screenshot shows an error message: 'We hit a snag.' with the note 'A tenant can have only one property', indicating a validation rule or trigger has been triggered.

Testing & Debugging

Lease Management - Recently Viewed (Left):

- 1. nirjan
- 2. kaleee
- 3. kaleeswari
- 4. Mahima
- 5. pune

Lease Management - Recently Viewed (Right):

- 1. Thoothukudi
- 2. manne residency
- 3. house
- 4. pune
- 5. kalees

Tenant niranjan

Details:

- Tenant Name: niranjan
- Email: kaleeswari092004@gmail.com
- Phone:
- property: manne residency
- status: Leaving
- Created By: kaleeswari k, 10/27/2025, 9:15 PM
- Last Modified By: kaleeswari k, 11/1/2025, 11:06 PM

Activity:

- No activities to show.
- No past activity. Past meetings and tasks marked as done show up here.

Tenant niranjan

Related **Details**

Payment (0)

Approval History (6+)

Step Name	Date	Status	Assigned To
Submit for approval	11/2/2025, 12:49 AM	Pending	kaleeswari k
Approval Request Submi...	11/2/2025, 12:49 AM	Submitted	kaleeswari k
Submit for approval	11/2/2025, 12:11 AM	Approved	kaleeswari k
Approval Request Submi...	11/2/2025, 12:10 AM	Submitted	kaleeswari k
Submit for approval	11/1/2025, 11:58 PM	Rejected	kaleeswari k

Notifications:

- kaleeswari k is requesting approval for tenant niranjan (a few seconds ago)
- Approval request for the tenant is approved niranjan (39 minutes ago)
- Approval request for the tenant is rejected niranjan (an hour ago)
- Approval request for the tenant is approved niranjan (an hour ago)
- Approval request for the tenant is approved niranjan (an hour ago)

2. Sprint Delivery Plan

The development was divided into six agile sprints to ensure incremental progress.

Sprint	Sprint Goal	Deliverables
Sprint 1	Setup & Object Creation	Salesforce org setup, Property/Tenant/Lease/Payment objects created
Sprint 2	Fields & Relationships	Custom fields and lookup/master-detail relationships configured
Sprint 3	App & Tabs Development	Lease Management App and Tabs added
Sprint 4	Automation Setup	Email templates, triggers, and flows implemented
Sprint 5	Approval Workflow	Vacant property approval process created and tested
Sprint 6	Final Testing & Documentation	Error handling, testing, and report preparation completed

3. Project Progress Tracking

To ensure smooth progress, the project followed agile tracking techniques:

- **Daily Logs:** Recorded completion of Salesforce configurations and tests.
- **Sprint Reviews:** Weekly review of created objects, fields, and automation logic.
- **Checkpoints:** Validated Apex, Flow, and Approval process outputs after each sprint.
- **Testing Reports:** Verified that all email alerts, triggers, and validations performed accurately.

Project progress was monitored using:

- **Manual checklists** for Salesforce task completion.
- **Burndown tracking** for pending vs. completed milestones.
- **Screen captures** for every successful output.

4. Team Management Tool for Agile Planning

The project used Trello to manage milestones, tasks, and sprint activities. It helped track which Salesforce features were *Backlog*, *In-Progress*, *Review*, and *Complete*.

Trello Structure Used:

- Board Name: *Lease Management Project*
- Lists: *Backlog*, *In-Progress*, *Review*, and *Complete*
- Cards: Each task (e.g., *Create Lease Object*, *Add Validation Rule*, *Test Apex Trigger*)

6. Final Working of Lease Management Application

Comments: Niraj request
11/2/2025, 12:11 AM
Status: Approved Assigned To: kaleeswari k Actual Approver: kaleeswari k Comments: Niraj is approved , byeee
11/2/2025, 12:10 AM
Status: Submitted Assigned To: kaleeswari k Actual Approver: kaleeswari k Comments: Niraj is submitted for approval
11/1/2025, 11:58 PM
Status: Rejected Assigned To: kaleeswari k Actual Approver: kaleeswari k Comments: Rejected
11/1/2025, 11:57 PM
Status: Submitted Assigned To: kaleeswari k Actual Approver: kaleeswari k Comments: Leaving Bye
11/1/2025, 11:36 PM
Status: Approved Assigned To: kaleeswari k Actual Approver: kaleeswari k Comments: approved

Printable View of Nirajan Tenant