

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:

Sign up for your Developer Edition

A free Salesforce Platform environment with Agentforce and Data Cloud

First name

kaleeswari

Last name

k

Job title

Developer

Work email

kaleeswari092004@agentforce.com

Company

Government college

Country/Region

India

☒ I agree to the Main Services Agreement – Developer Services and Salesforce Program Agreement. I acknowledge, as described in the Developer Documentation: (1) the Developer Edition includes autonomous and other generative AI features, and (2) Salesforce may limit use of those features and the org, and may terminate any org that has been inactive for 45 days.

✓ I'm not a robot

agentforce is changing to terms of service

See details

Privacy

Terms

Sign Me Up

Welcome to your Developer Edition

Hi kaleeswari,

Thanks for signing up for a Developer Edition. Now you can start building on Salesforce for free and get hands-on with Agentforce and Data Cloud.

There's just one more step. Use the following link to reset the password for your Developer Edition. This link expires in 24 hours.

Reset Password

To easily log in later, save this URL:
<https://orgfarm-89e70953ba-dev-ed.develop.my.salesforce.com>

Here's the username for your Developer Edition:
kaleeswari092004525@agentforce.com

Your Developer Edition, now enabled with Agentforce and Data Cloud, remains active as long as you continue to use it. It expires after 45 days of non-usage.

Again, welcome to Salesforce!
Developer Relations

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

Object Creation

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

Action	Label	Tab Style	Description
✎ Del	Home	Home	
✎ Del	Payment	Payment	
✎ Del	property	Property	
✎ Del	Tenant	Tenant	

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 ⓘ

Lease ManagementDeveloper

* Developer Name ⓘ


Lease_ManagementDeveloper

Description ⓘ

Enter a description...

App Branding

Image ⓘ



Primary Color Hex

Value ⓘ


#0070D2

Clear

Org Theme Options

☐ Use the app's image and color instead of the org's custom theme

App Launcher Preview

 Lease ManagementDevelo...

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

🔍 lease

Selected Items

Payment

Tenants

property

lease

➡

⬅

Back

Next

SETUP > OBJECT MANAGER				
lease				
Details	Fields & Relationships			
	10 Items, Sorted by Field Label			
	<input type="text" value="Quick Find"/> <input type="button" value="New"/> <input type="button" value="Deleted Fields"/> <input type="button" value="Field Dependencies"/> <input type="button" value="Set History Tracking"/>			
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	CreatedById	Lookup(User)	
Compact Layouts	End Date	End_Date__c	Date	
Field Sets	Last Modified By	LastModifiedById	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

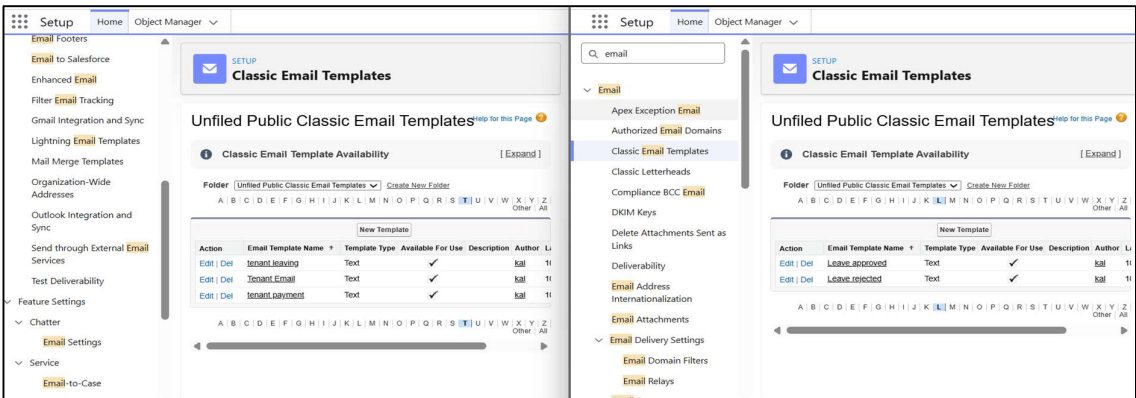
SETUP > OBJECT MANAGER				
Payment for tenanat				
Details	Fields & Relationships			
	8 Items, Sorted by Field Label			
	<input type="text" value="Quick Find"/> <input type="button" value="New"/> <input type="button" value="Deleted Fields"/> <input type="button" value="Field Dependencies"/> <input type="button" value="Set History Tracking"/>			
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	CreatedById	Lookup(User)	
Compact Layouts	Last Modified By	LastModifiedById	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

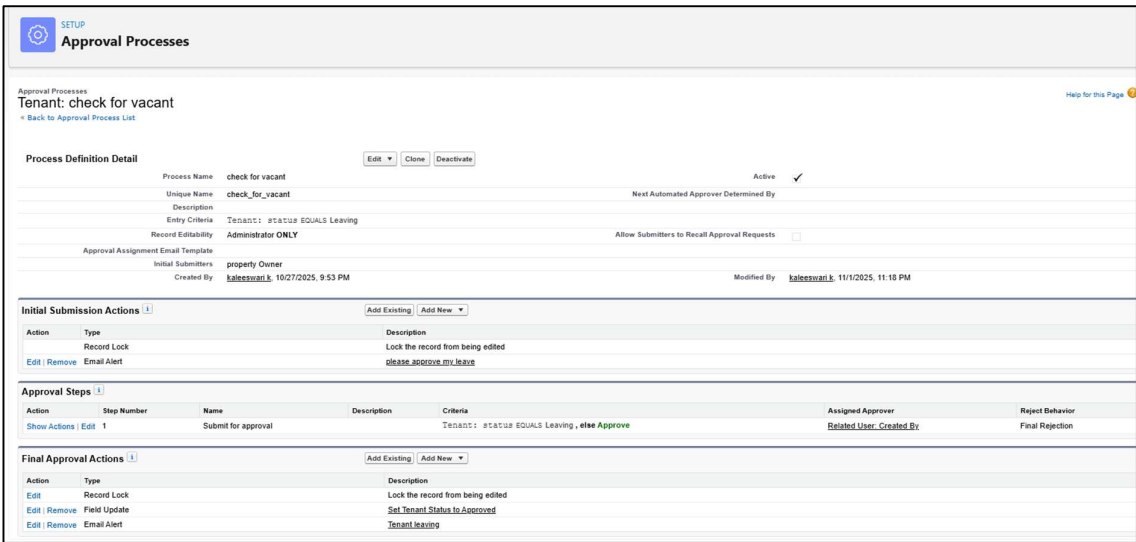
Relationship & Validation Setup

SETUP > OBJECT MANAGER				
lease				
Details	Validation Rules			
	1 Items, Sorted by Rule Name			
	<input type="button" value="New"/>			
Fields & Relationships	RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE MODIFIED BY
Page Layouts	lease_end_date	Start Date	Your End Date must be greater than Start Date	✓ kuleswari k, 10/26/2023, 11:56 PM
Lightning Record Pages				
Buttons, Links, and Actions				
Compact Layouts				
Field Sets				
Object Limits				
Record Types				
Related Lookup Filters				
Search Layouts				
List View Button Layout				
Restriction Rules				
Scoping Rules				
Object Access				
Triggers				
Flow Triggers				
Validation Rules				
Conditional Field Formatting				

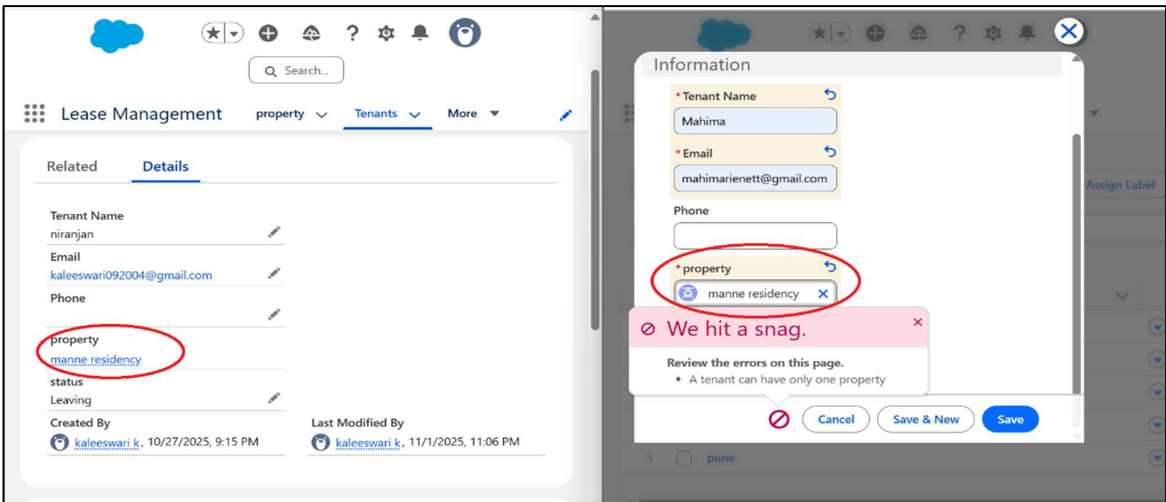
Email Templates Creation



Approval Process Implementation



Apex Trigger & Handler Development



Testing & Debugging

Search...

Lease Management

property

Tenants

More

Tenants

Recently Viewed

New Import Assign Label

5 items • Updated 9 minutes ago

Search this list...

Tenant Name

1 niranjan

2 kaleee

3 kaleeswari

4 Mahima

5 pune

Search...

Lease Management

property

Tenants

More

Recently Viewed

New Import Change Owner Assign Label

5 items • Updated a few seconds ago

Search this list...

property Name

1 Thoothukudi

2 manne residency

3 house

4 pune

5 kalees

Search...

Lease Management

property

lease

Tenants

Payment

Tenant

niranjan

Tenant was submitted for approval.

New Contact Edit New Opportunity

Related 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

Filters: All time • All activities • All types

Refresh Expand All View All

Upcoming & Overdue

No activities to show.

Get started by sending an email, scheduling a task, and more.

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

Search...

Lease Management

property

lease

Tenants

Payment

Tenant

niranjan

Related Details

Payment (0)

New

Approval History (6+)

Approve Reject

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

Mark all as read

kaleeswari k is requesting approval for tenant

Tenant Name: 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

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	Nira request
11/2/2025, 12:11 AM	
Status	Approved
Assigned To	kaleeswari k
Actual Approver	kaleeswari k
Comments	Nira is approved , byeee
11/2/2025, 12:10 AM	
Status	Submitted
Assigned To	kaleeswari k
Actual Approver	kaleeswari k
Comments	Nira 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