Project Planning Phase

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

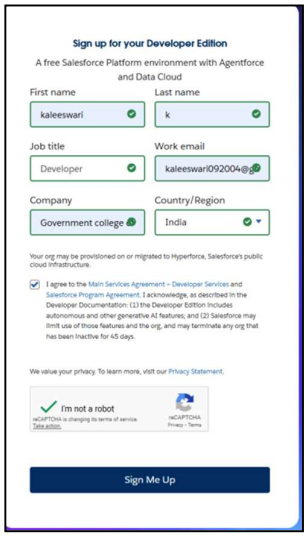
1. Project Milestones & Tasks

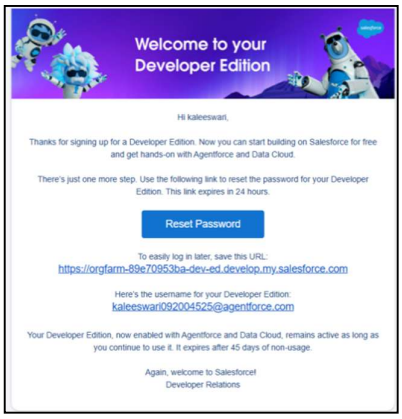
The project was executed in multiple milestones, where each milestone focused on a major functional area — from creating Salesforce objects to developing automation and approval workflows.

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

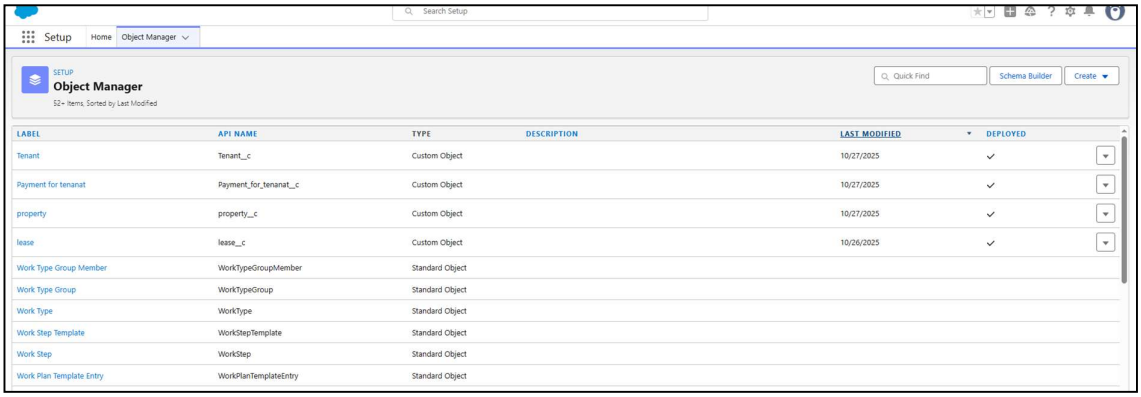
Salesforce Environment Setup:





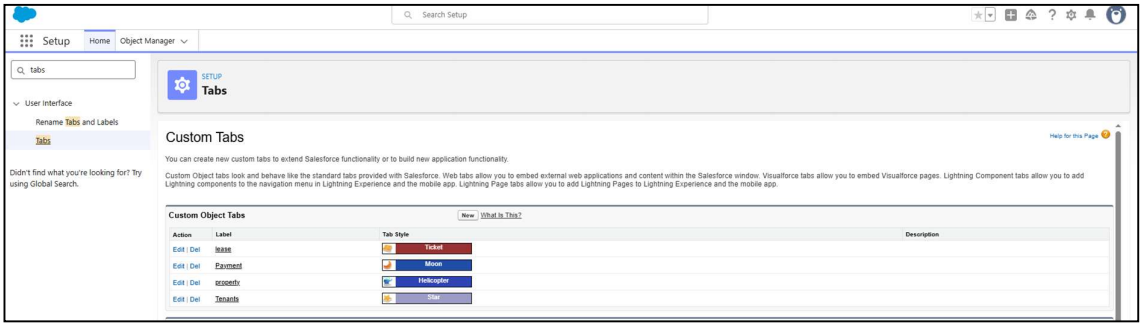
Salesforce Developer Edition environment setup and workspace initialization for the Lease Management System

Object Creation



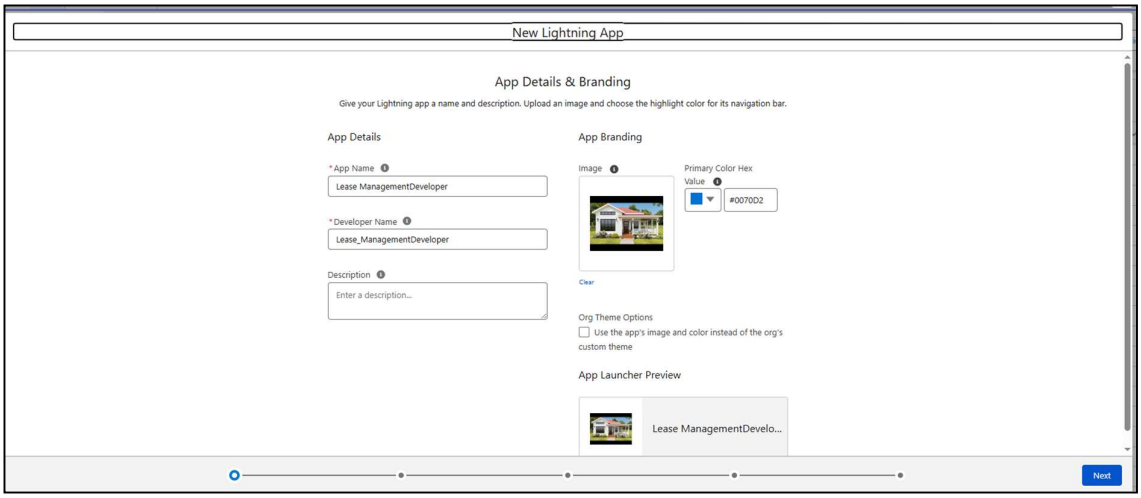
Creation of custom objects (Property, Tenant, Payment, Lease) to structure and store lease-related data

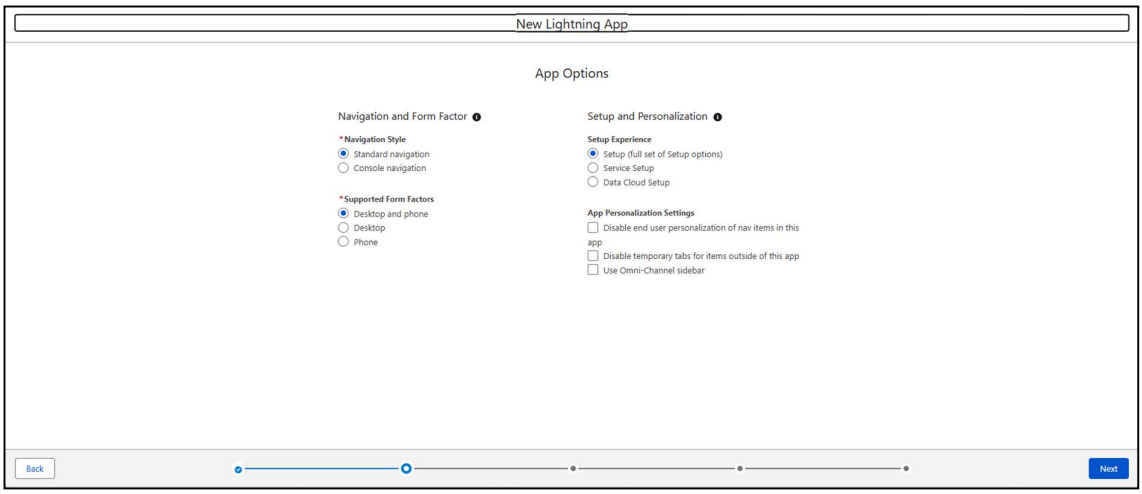
Custom Tabs

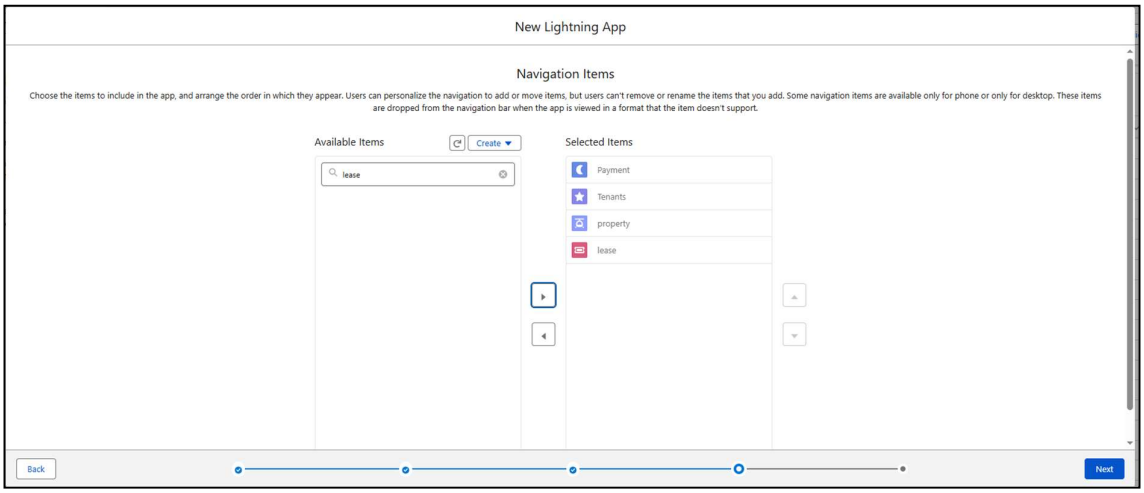


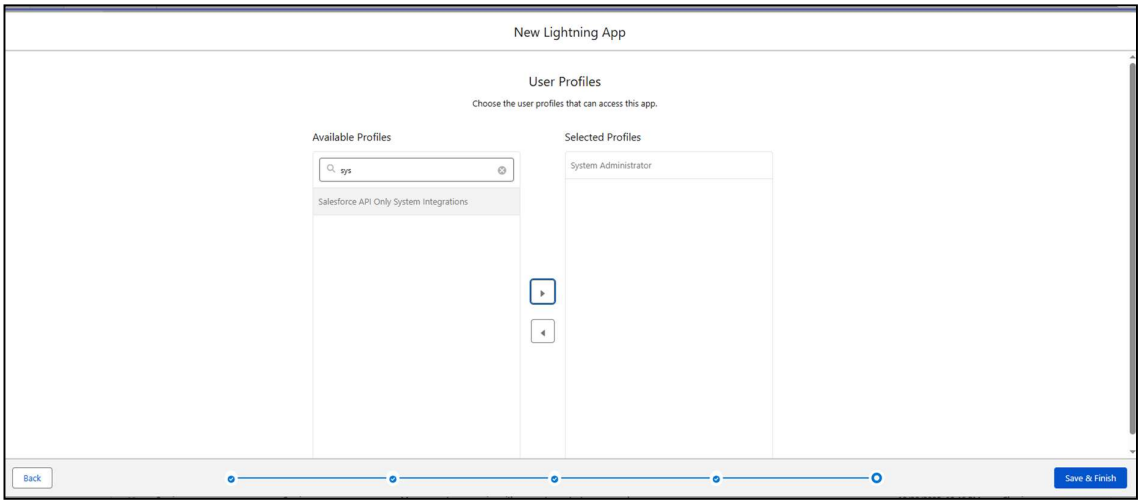
Configuration of custom tabs

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
Clear
Primary Color Hex Value
#0070D2
Org Theme Options
Use the app's image and color instead of the org's custom theme
App Launcher Preview
Lease ManagementDevelo...
Next

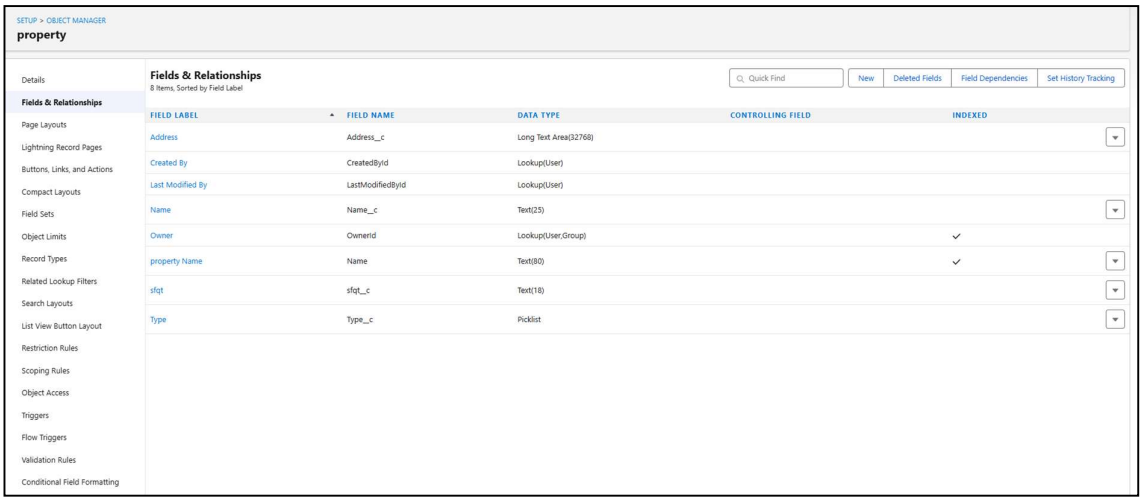

New Lightning App
App Options
Navigation and Form Factor
*Navigation Style
Standard navigation
Console navigation
*Supported Form Factors
Desktop and phone
Desktop
Phone
Setup and Personalization
Setup Experience
Setup (full set of Setup options)
Service Setup
Data Cloud Setup
App Personalization Settings
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
Create
lease
Selected Items
Payment
Tenants
property
lease
Back
Next

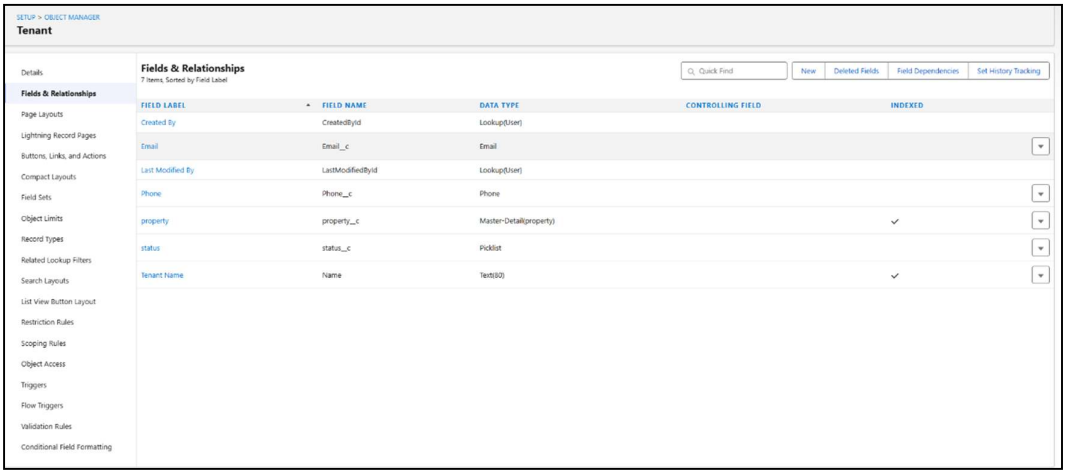


Dedicated Lease Management application for easy navigation within Salesforce

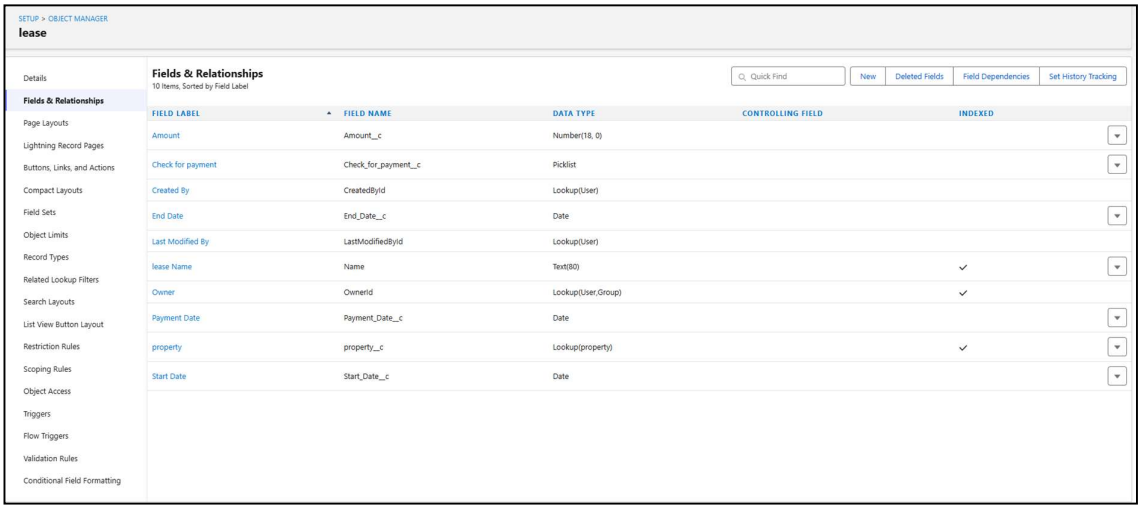
Field Configuration



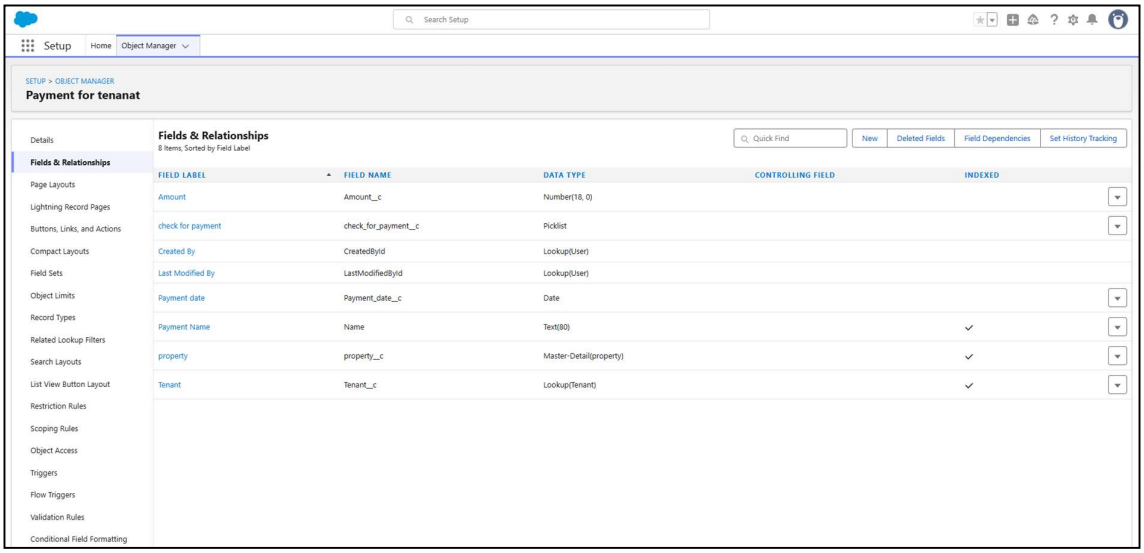
Creation of fields for the property object



Creation of fields for the tenant object

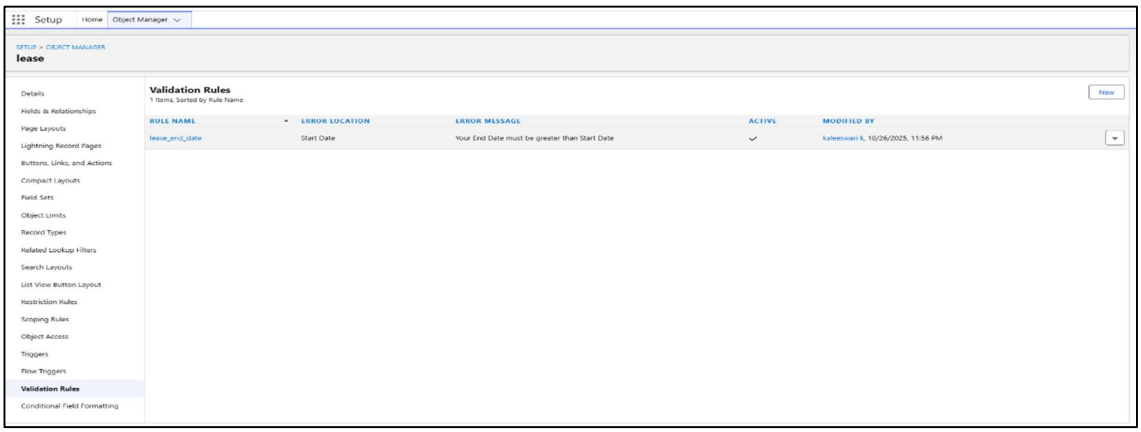


Creation of fields for the lease object

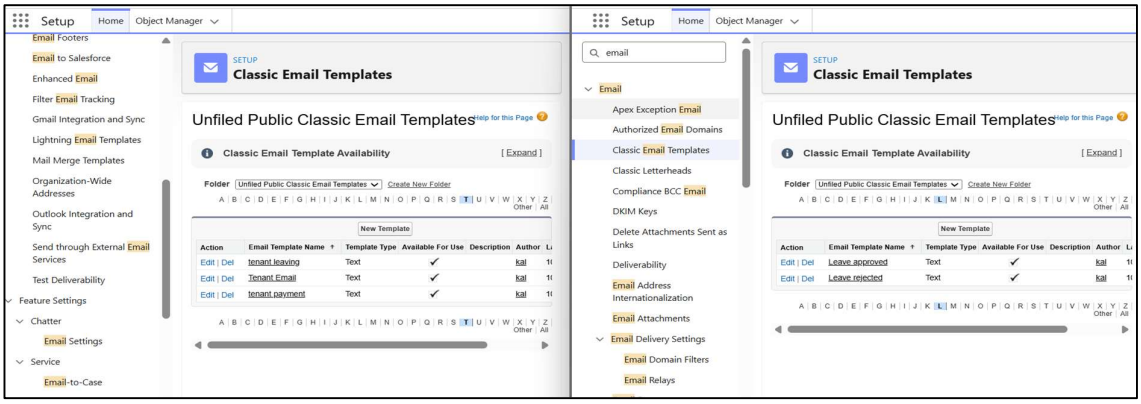


Creation of fields for the Payment for tenant object

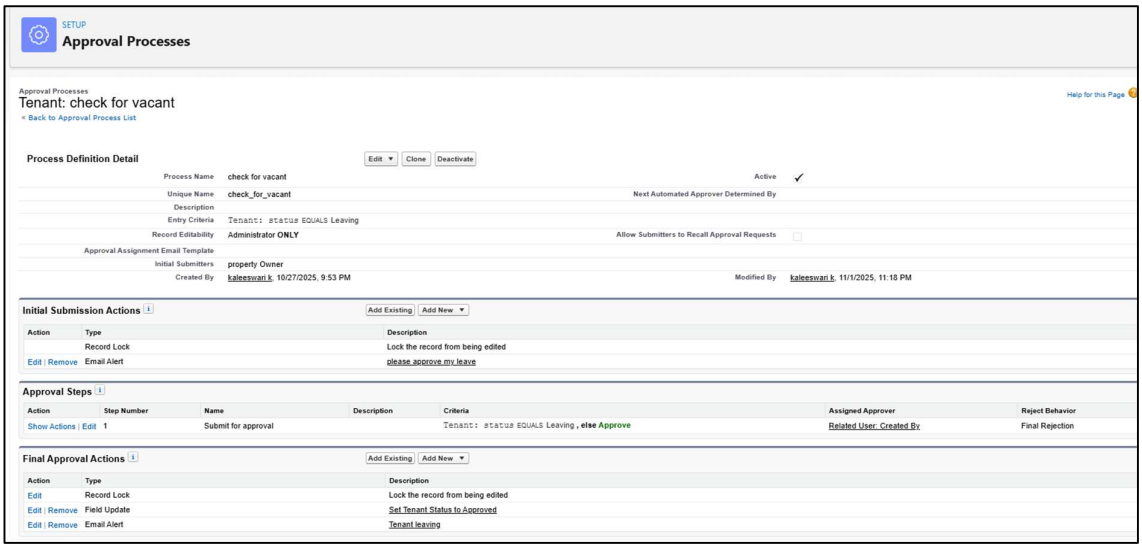
Relationship & Validation Setup



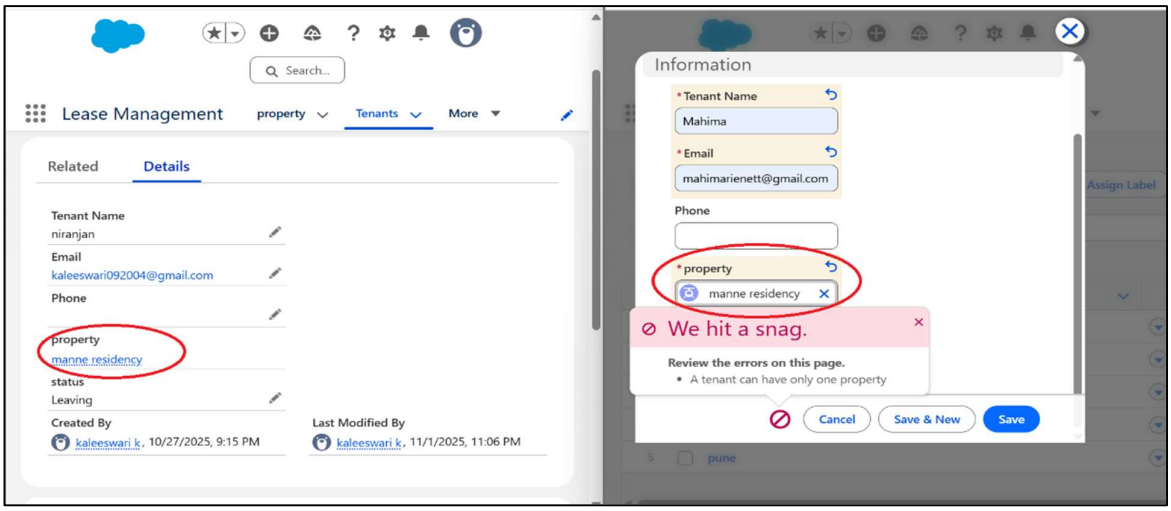
Email Templates Creation



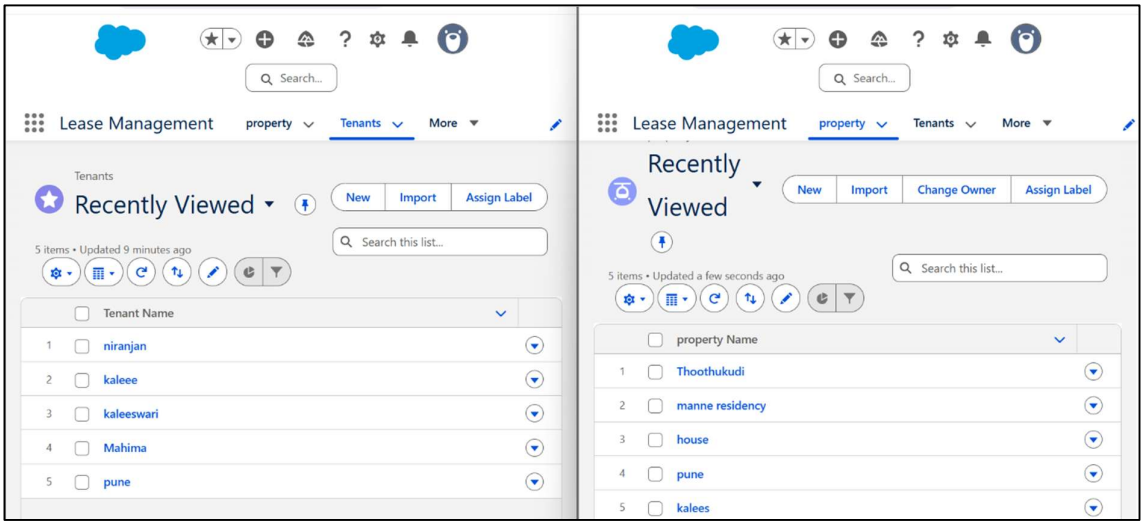
Approval Process Implementation

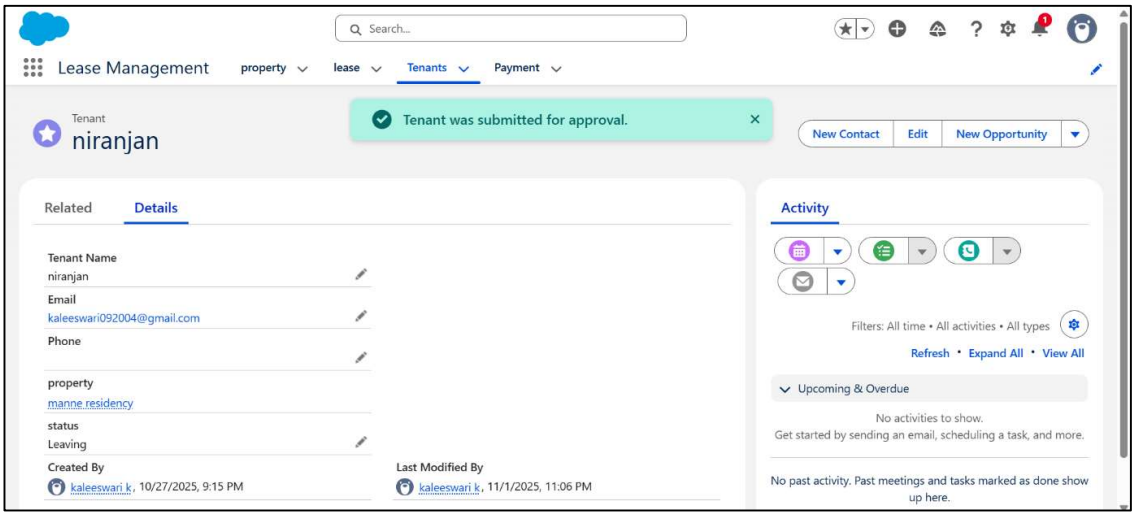


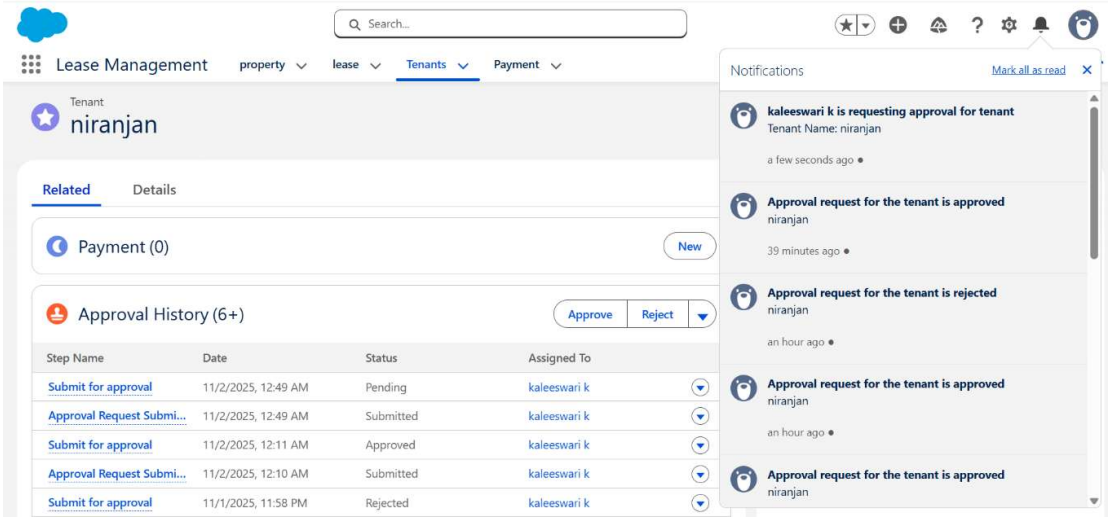
Apex Trigger & Handler Development



Testing & Debugging







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.

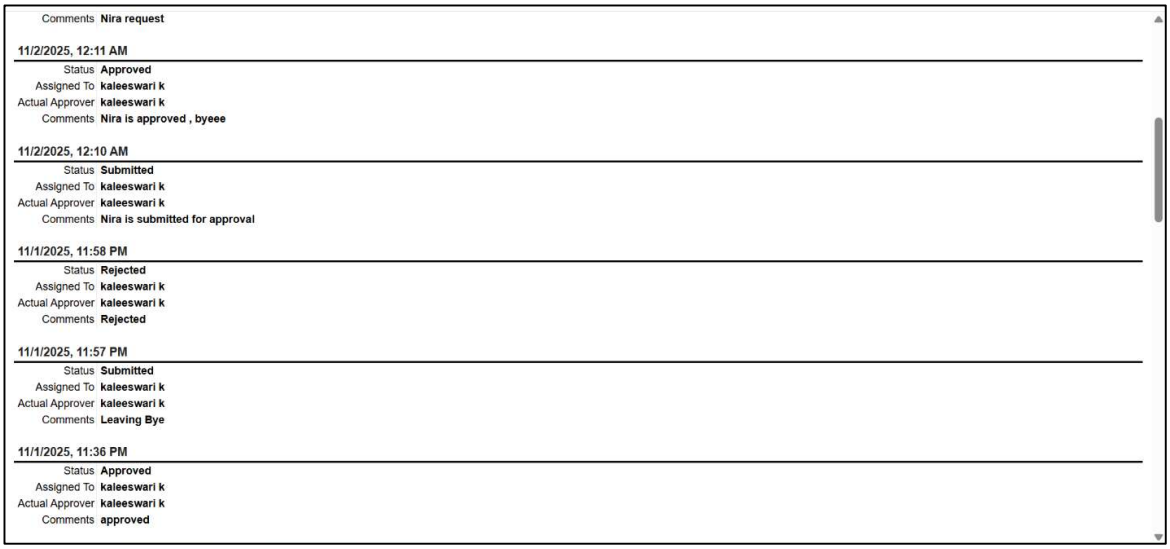
4. Team Management Tool for Agile Planning

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



Printable View of Nirajan Tenant