PROJECT TITLE

College Name: Rathinam College of Liberal Arts and Science at Tips Global

College Code: CD

TEAM ID: MN2025TMID

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Team Member2: SARNESH

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1. INTRODUCTION

1.1 Project Overview

The Lease Management System is a **Salesforce-based cloud application** developed to simplify and optimize the end-to-end process of managing real estate properties and rental agreements. In traditional leasing, property owners or managers often face challenges such as manual record keeping, lack of timely reminders, difficulty in tracking payments, and miscommunication between tenants and administrators.

To overcome these challenges, the proposed Lease Management System makes use of **Salesforce CRM's powerful features** such as **custom objects, process automation, approval processes, validation rules, and Apex programming**. These tools together form a robust solution that eliminates manual dependency and ensures greater efficiency.

The system allows administrators to manage all critical aspects of leasing, including:

- Maintaining property records (houses, flats, shops, tents, stalls, etc.).
- Storing tenant details with personal and communication information.
- Creating and monitoring lease agreements.
- Tracking monthly rent payments and generating reminders.
- Automating lease approval workflows to reduce delays and errors.

Furthermore, the solution supports **real-time property status updates** (Vacant/Occupied), **email alerts** for tenants, **scheduled tasks** for monthly rent reminders, and **restriction mechanisms** to prevent incorrect data entry. By integrating all lease-related activities in a single platform, this system ensures improved transparency, accountability, and overall operational excellence.

What is this project?

We are building a simple **Lease Management System** inside Salesforce. It's like a digital notebook to keep track of:

1. Your **Properties** (Houses, Apartments you own)
2. Your **Tenants** (People who rent from you)
3. Their **Lease Agreements** (The contract that says who rents what, and for how much)
4. Their **Payments** (When they pay the rent)

Our goal is to make this notebook smart so it can stop us from making mistakes, like renting the same property to two people.

1.2 Purpose

The primary purpose of this project is to build a **centralized and automated lease management platform** that can benefit property owners, administrators, and tenants alike. The goals include:

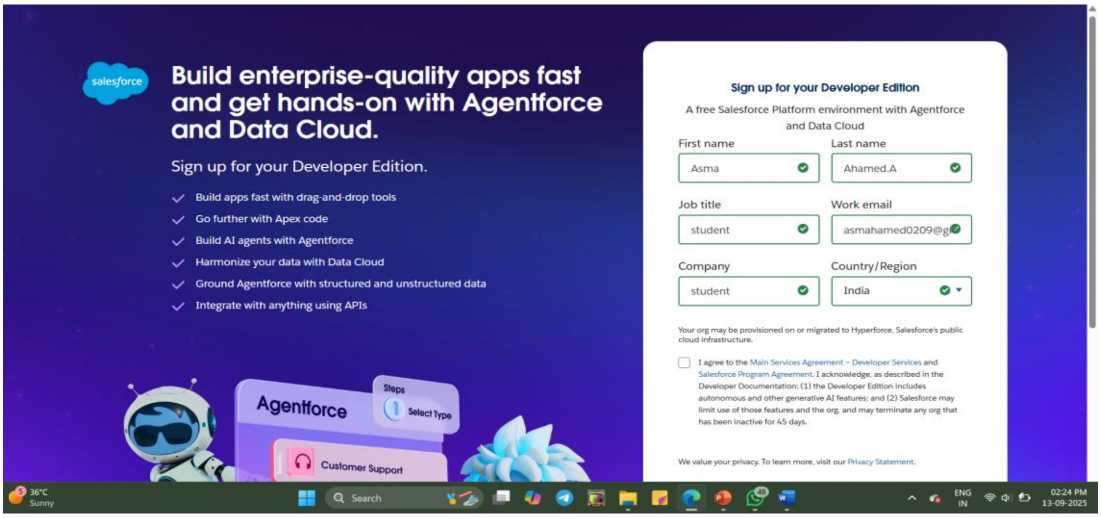
- **Automation of Lease Operations**: Reduce manual efforts by automating repetitive tasks such as property status updates, payment reminders, and lease expiration notifications.
- **Real-Time Tracking of Properties**: Provide instant visibility of whether a property is available (Vacant) or occupied, thereby improving utilization and reducing idle time.
- **Streamlined Tenant Management**: Maintain accurate and complete tenant records including contact information, lease history, and payment status.
- **Improved Accuracy in Rent Collection**: Minimize errors in rent calculation, ensure timely payments, and generate alerts for pending dues.
- **Enhanced Communication**: Use Salesforce features like email alerts, approval notifications, and scheduled reminders to keep both tenants and managers informed at all times.
- **Scalability and Flexibility**: Design the system to handle different types of rental assets (tents, shops, apartments, offices) and easily adapt to future enhancements.

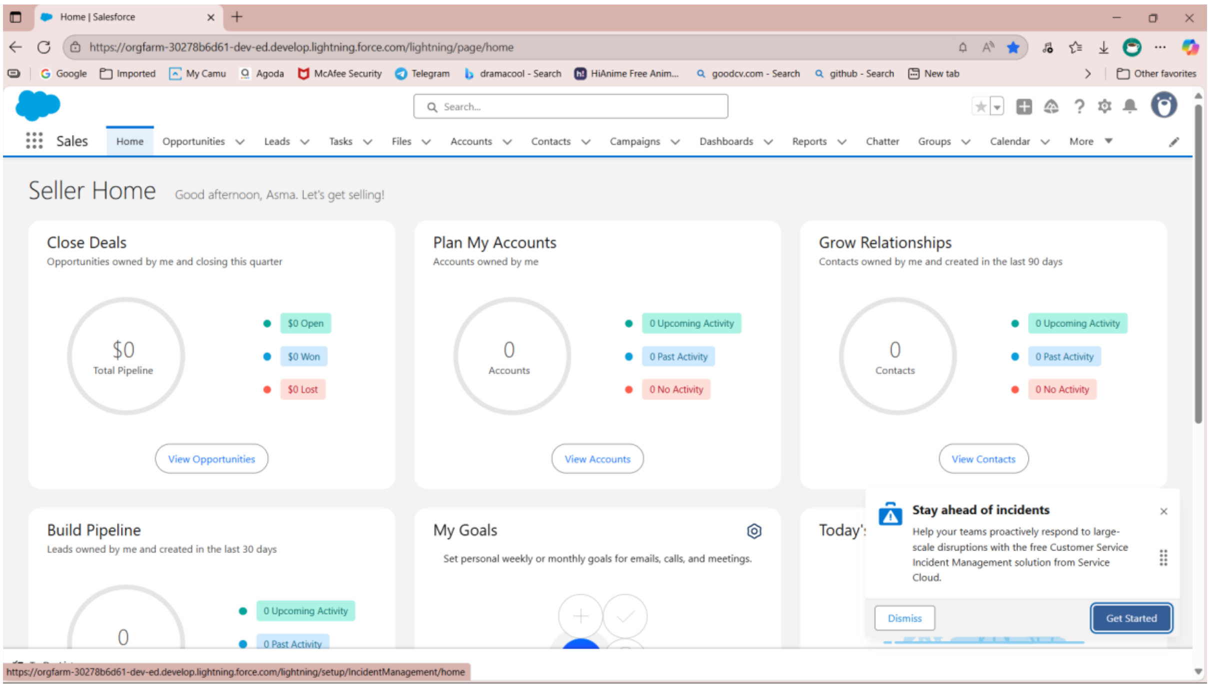
By achieving these objectives, the Lease Management System not only simplifies administrative workloads but also enhances tenant satisfaction and ensures steady financial management for property owners.

DEVELOPMENT PHASE

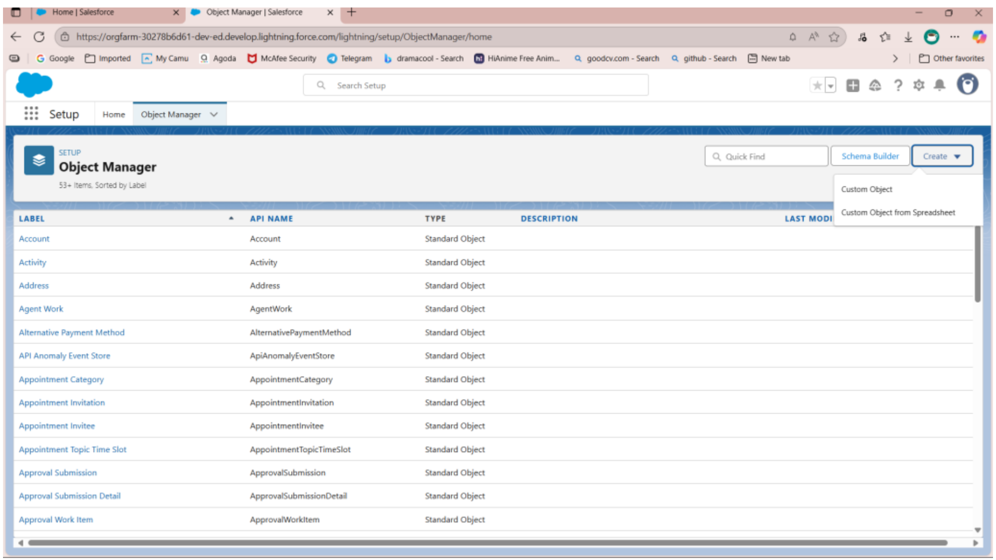
Creating Developer Account:

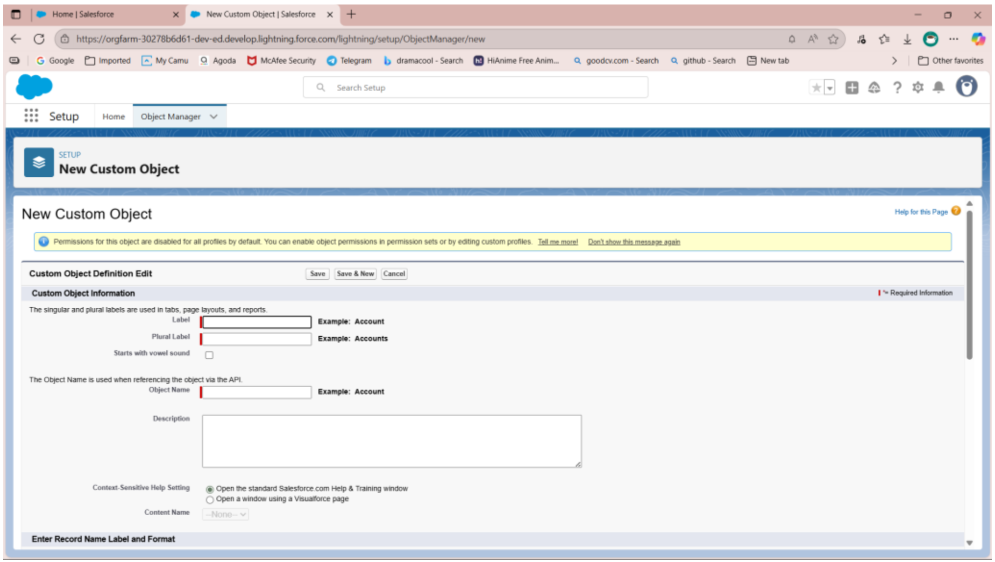
By using this URL - https://www.salesforce.com/form/developer-signup/?d=pb

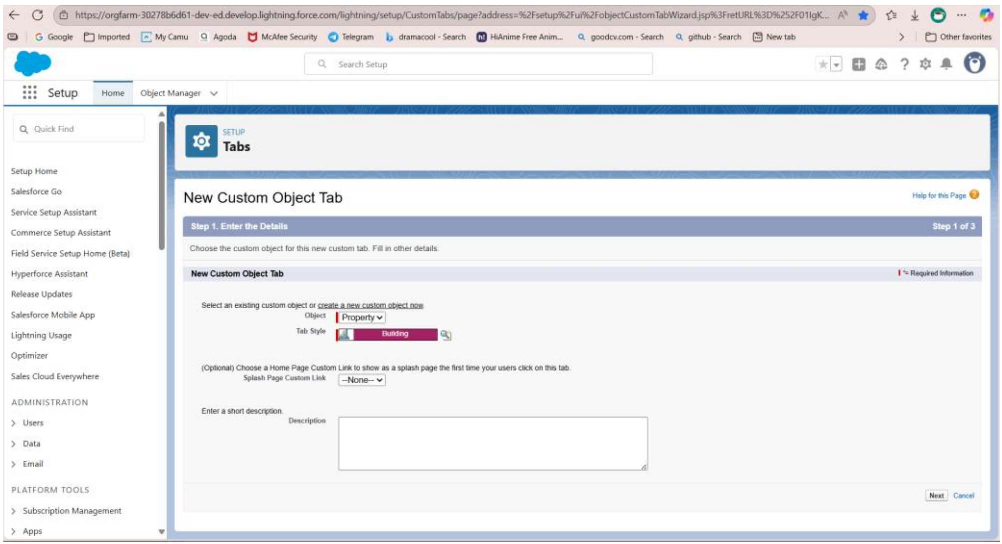


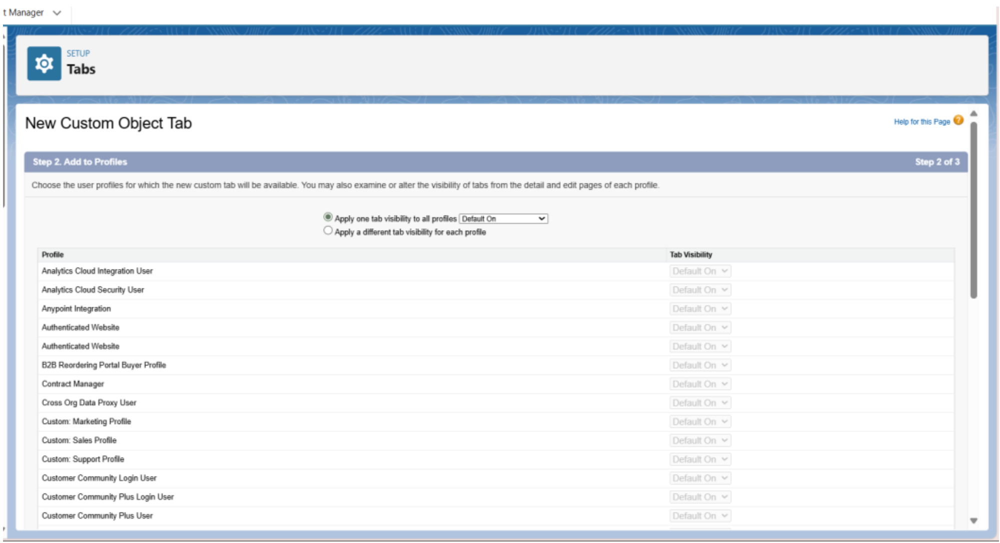


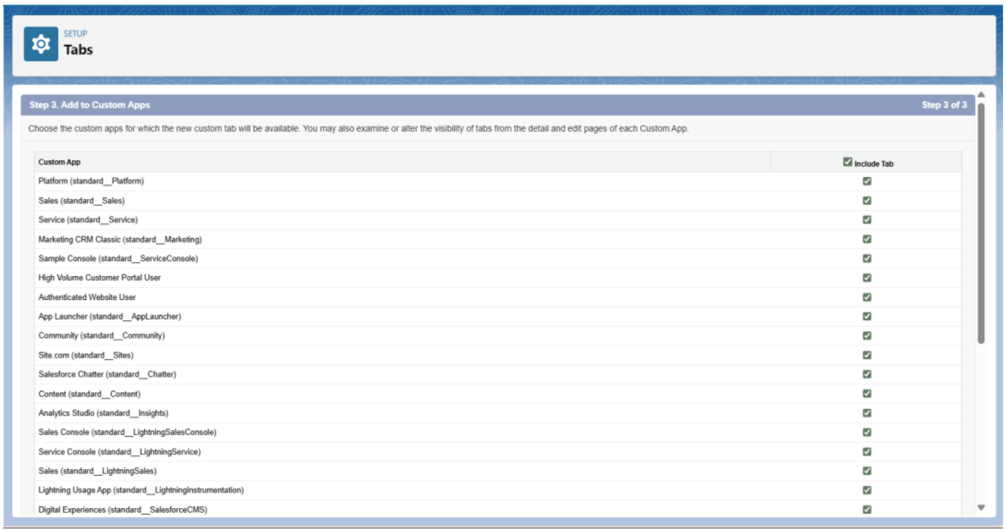
Created objects: Property, Tenant, Lease, Payment

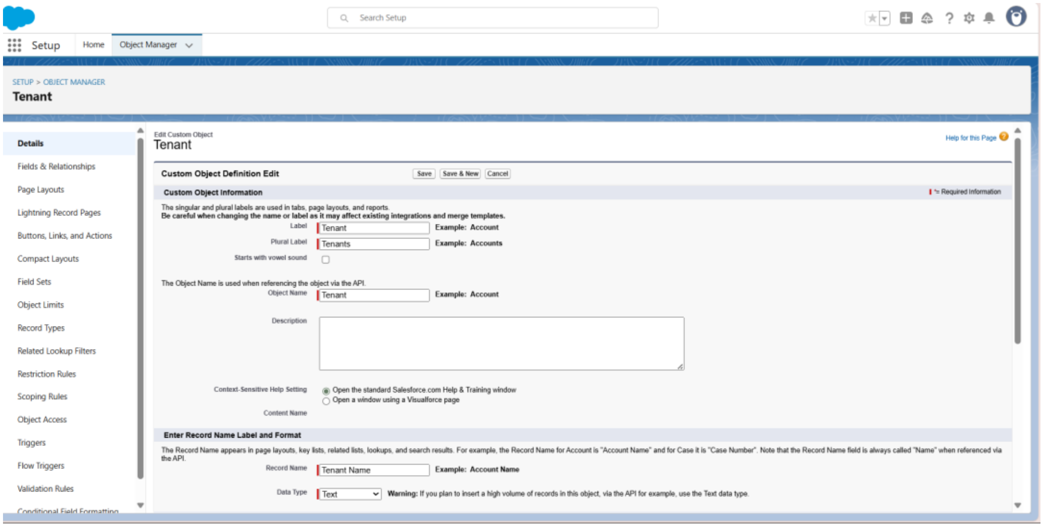


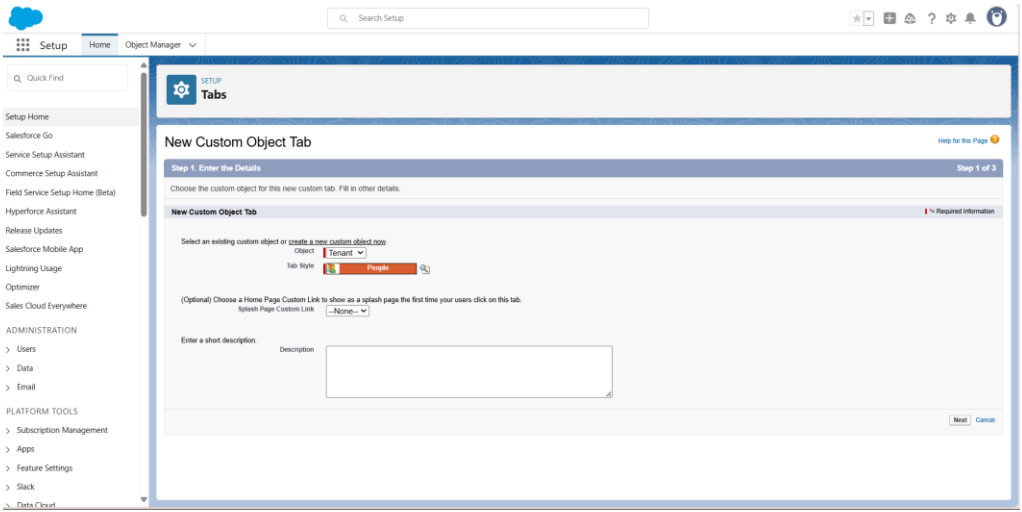

Setup
Home
Object Manager
SETUP
New Custom Object
New Custom Object
Help for this Page
Custom Object Definition Edit
Save
Save & New
Cancel
Custom Object Information
Required Information
The singular and plural labels are used in tabs, page layouts, and reports.
Label
Example: Account
Plural Label
Example: Accounts
Starts with vowel sound
The Object Name is used when referencing the object via the API.
Object Name
Example: Account
Description
Context-Sensitive Help Setting
Open the standard Salesforce.com Help & Training window
Open a window using a Visualforce page
Content Name
Enter Record Name Label and Format


Setup
Home
Object Manager
Quick Find
Setup Home
Salesforce Go
Service Setup Assistant
Commerce Setup Assistant
Field Service Setup Home (Beta)
Hyperforce Assistant
Release Updates
Salesforce Mobile App
Lightning Usage
Optimizer
Sales Cloud Everywhere
ADMINISTRATION
Users
Data
Email
PLATFORM TOOLS
Subscription Management
Apps
SETUP
Tabs
New Custom Object Tab
Help for this Page
Step 1. Enter the Details
Step 1 of 3
Choose the custom object for this new custom tab. Fill in other details.
New Custom Object Tab
Required Information
Select an existing custom object or create a new custom object now.
Object
Property
Tab Style
Building
(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.
Splash Page Custom Link
--None--
Enter a short description.
Description
Next
Cancel


SETUP
Tabs
New Custom Object Tab
Help for this Page
Step 2. Add to Profiles
Step 2 of 3
Choose the user profiles for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each profile.
Apply one tab visibility to all profiles
Default On
Apply a different tab visibility for each profile
Profile
Tab Visibility
Analytics Cloud Integration User
Analytics Cloud Security User
Anypoint Integration
Authenticated Website
Authenticated Website
B2B Reordering Portal Buyer Profile
Contract Manager
Cross Org Data Proxy User
Custom: Marketing Profile
Custom: Sales Profile
Custom: Support Profile
Customer Community Login User
Customer Community Plus Login User
Customer Community Plus User


SETUP
Tabs
Step 3. Add to Custom Apps
Step 3 of 3
Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.
Custom App
Include Tab
Platform (standard__Platform)
Sales (standard__Sales)
Service (standard__Service)
Marketing CRM Classic (standard__Marketing)
Sample Console (standard__ServiceConsole)
High Volume Customer Portal User
Authenticated Website User
App Launcher (standard__AppLauncher)
Community (standard__Community)
Site.com (standard__Sites)
Salesforce Chatter (standard__Chatter)
Content (standard__Content)
Analytics Studio (standard__Insights)
Sales Console (standard__LightningSalesConsole)
Service Console (standard__LightningService)
Sales (standard__LightningSales)
Lightning Usage App (standard__LightningInstrumentation)
Digital Experiences (standard__SalesforceCMS)


Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Tenant
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Object Access
Triggers
Flow Triggers
Validation Rules
Edit Custom Object
Tenant
Help for this Page
Custom Object Definition Edit
Save
Save & New
Cancel
Custom Object Information
= Required Information
The singular and plural labels are used in tabs, page layouts, and reports.
Be careful when changing the name or label as it may affect existing integrations and merge templates.
Label
Tenant
Example: Account
Plural Label
Tenants
Example: Accounts
Starts with vowel sound
The Object Name is used when referencing the object via the API.
Object Name
Tenant
Example: Account
Description
Context-Sensitive Help Setting
Open the standard Salesforce.com Help & Training window
Open a window using a Visualforce page
Content Name
Enter Record Name Label and Format
The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.
Record Name
Tenant Name
Example: Account Name
Data Type
Text
Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.


Search Setup
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Commerce Setup Assistant
Field Service Setup Home (Beta)
Hyperforce Assistant
Release Updates
Salesforce Mobile App
Lightning Usage
Optimizer
Sales Cloud Everywhere
ADMINISTRATION
Users
Data
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PLATFORM TOOLS
Subscription Management
Apps
Feature Settings
Slack
SETUP
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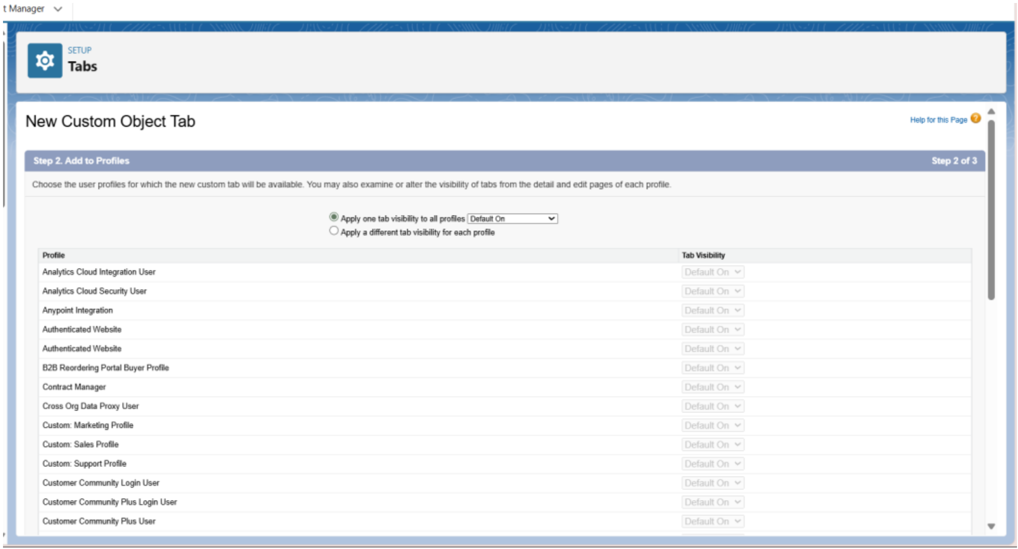
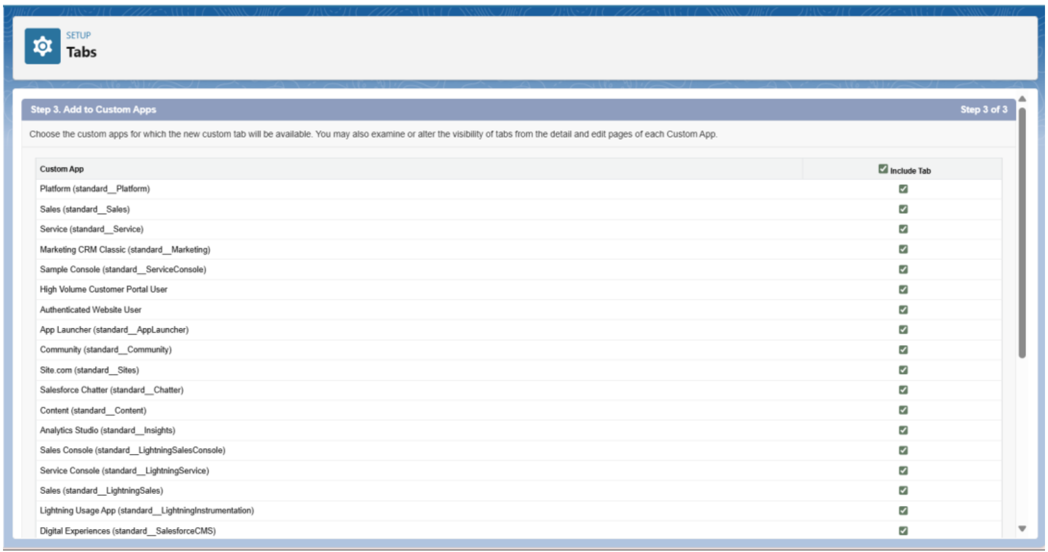
Help for this Page
Step 1. Enter the Details
Step 1 of 3
Choose the custom object for this new custom tab. Fill in other details.
New Custom Object Tab
= Required Information
Select an existing custom object or create a new custom object now.
Object
Tenant
Tab Style
People
(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.
Splash Page Custom Link
--None--
Enter a short description.
Description
Next
Cancel


SETUP
Tabs
New Custom Object Tab
Help for this Page
Step 2. Add to Profiles
Step 2 of 3
Choose the user profiles for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each profile.
Apply one tab visibility to all profiles Default On
Apply a different tab visibility for each profile
Profile
Tab Visibility
Analytics Cloud Integration User
Analytics Cloud Security User
Anypoint Integration
Authenticated Website
Authenticated Website
B2B Reordering Portal Buyer Profile
Contract Manager
Cross Org Data Proxy User
Custom: Marketing Profile
Custom: Sales Profile
Custom: Support Profile
Customer Community Login User
Customer Community Plus Login User
Customer Community Plus User
Default On


SETUP
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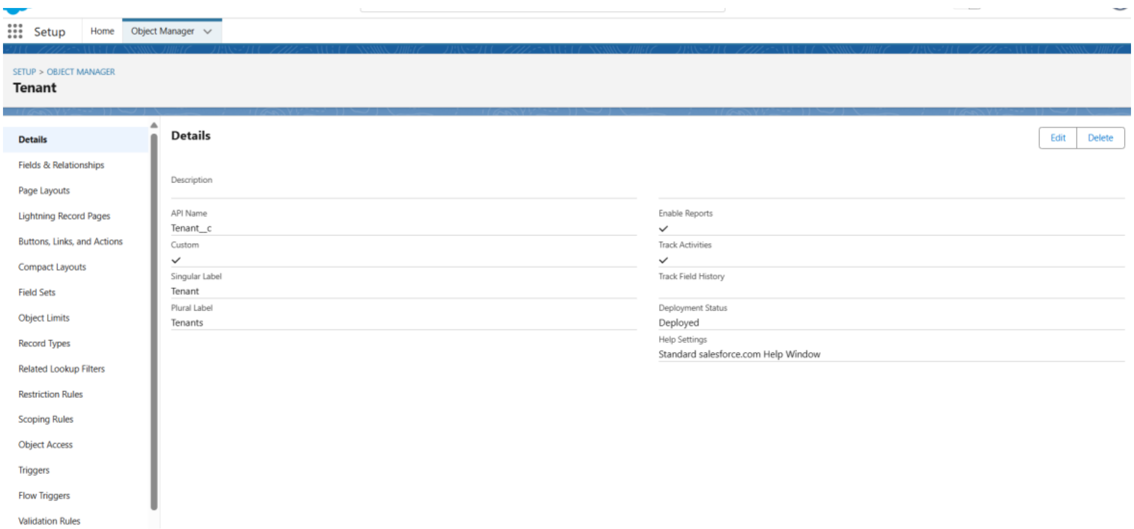
Digital Experiences (standard__SalesforceCMS)


Setup
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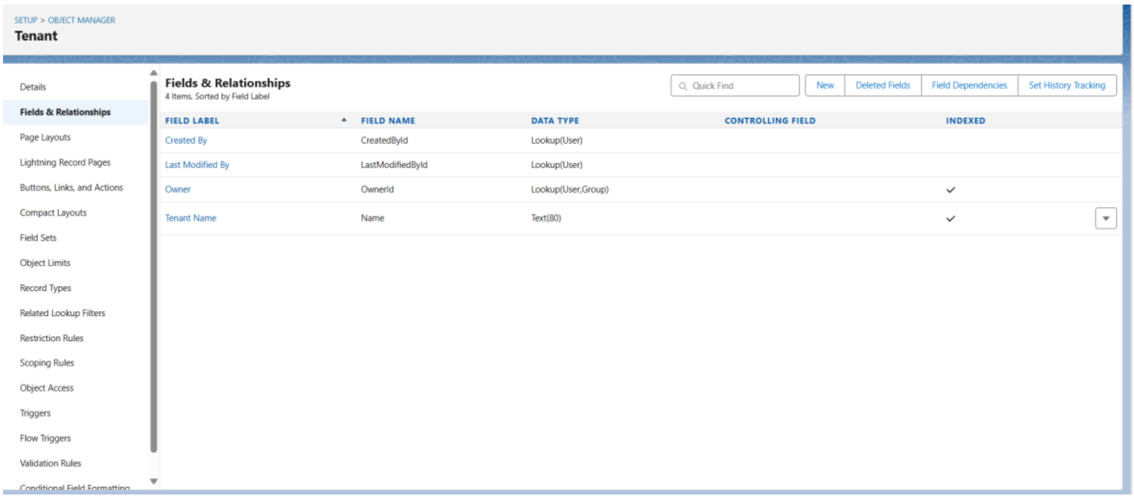
Object Manager
SETUP > OBJECT MANAGER
Tenant
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Object Access
Triggers
Flow Triggers
Validation Rules
Details
Edit
Delete
Description
API Name
Tenant__c
Custom
Singular Label
Tenant
Plural Label
Tenants
Enable Reports
Track Activities
Track Field History
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window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Object Access
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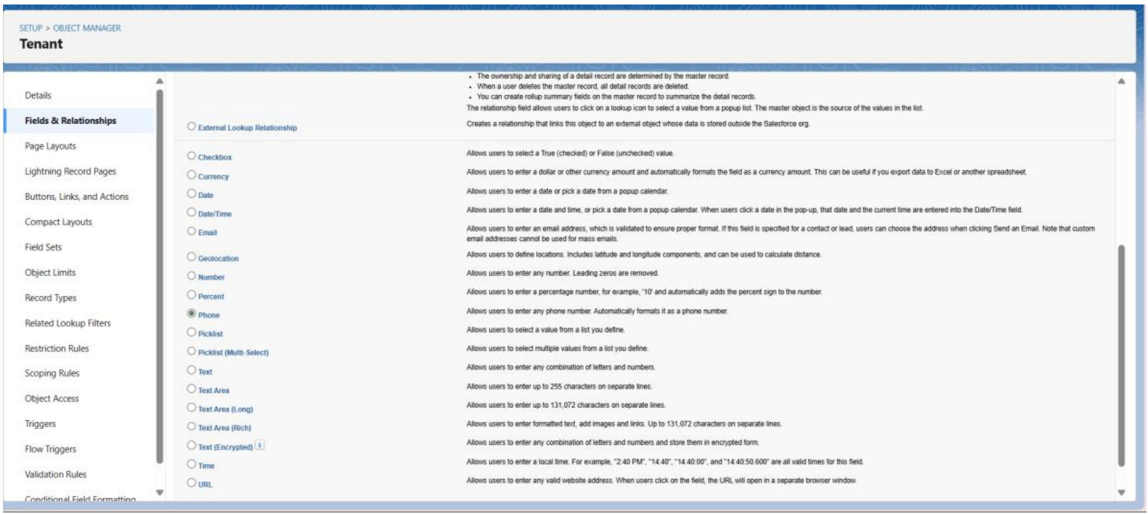
Flow Triggers
Validation Rules
Fields & Relationships
4 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Created By
CreatedById
Lookup(User)
Last Modified By
LastModifiedById
Lookup(User)
Owner
OwnerId
Lookup(User,Group)
Tenant Name
Name
Text(80)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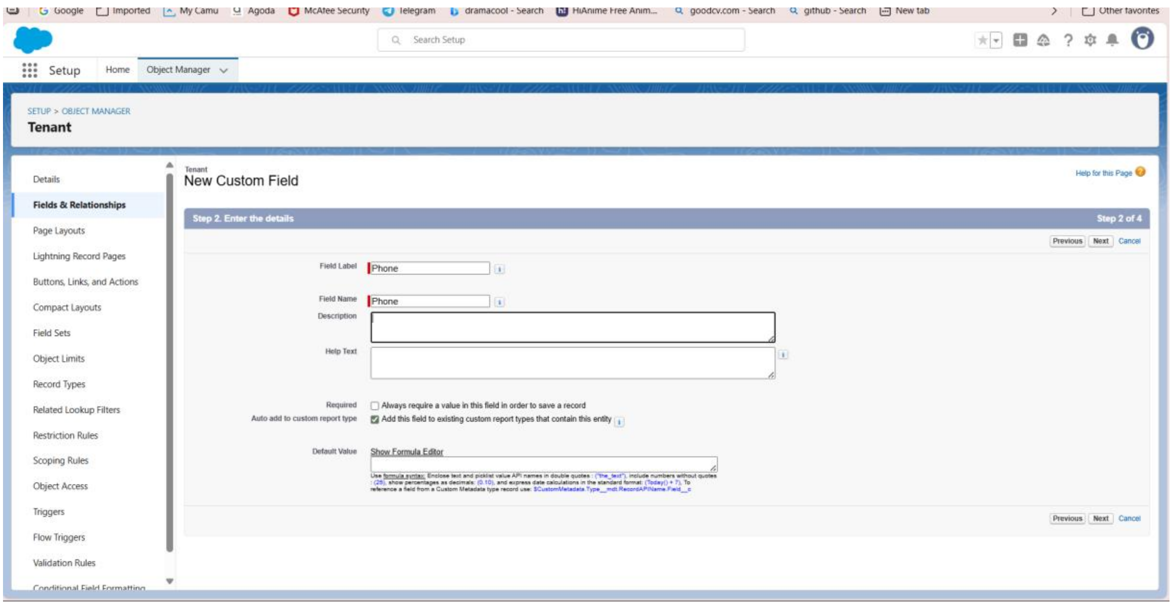
Scoping Rules
Object Access
Triggers
Flow Triggers
Validation Rules
External Lookup Relationship
Checkbox
Currency
Date
Date/Time
Email
Geolocation
Number
Percent
Phone
Picklist
Picklist (Multi-Select)
Text
Text Area
Text Area (Long)
Text Area (Rich)
Text (Encrypted)
Time
URL


Search Setup
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Page Layouts
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Buttons, Links, and Actions
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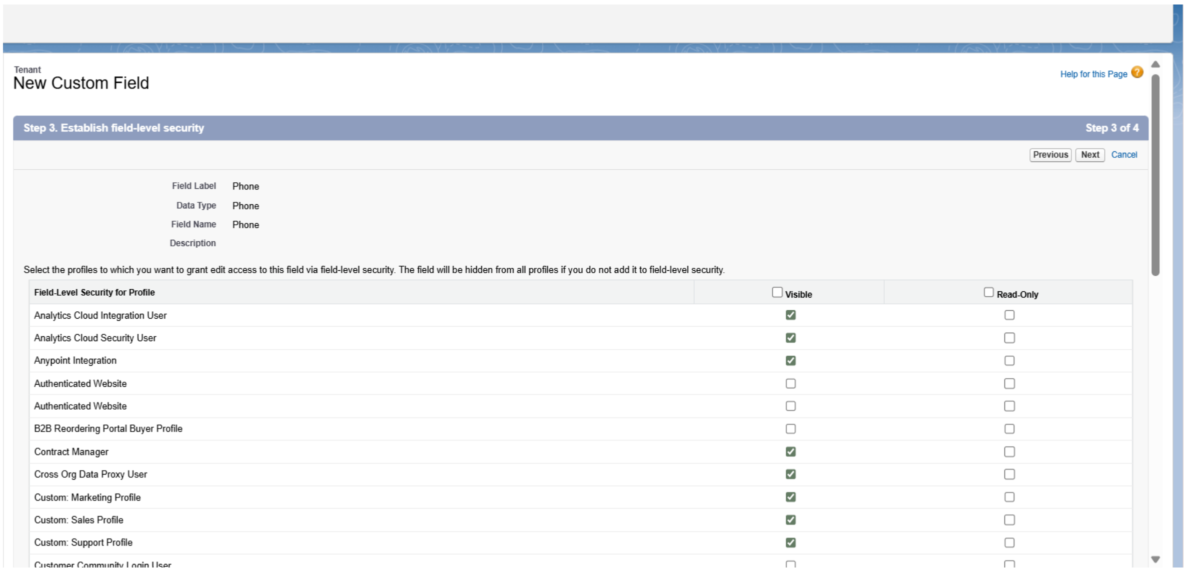
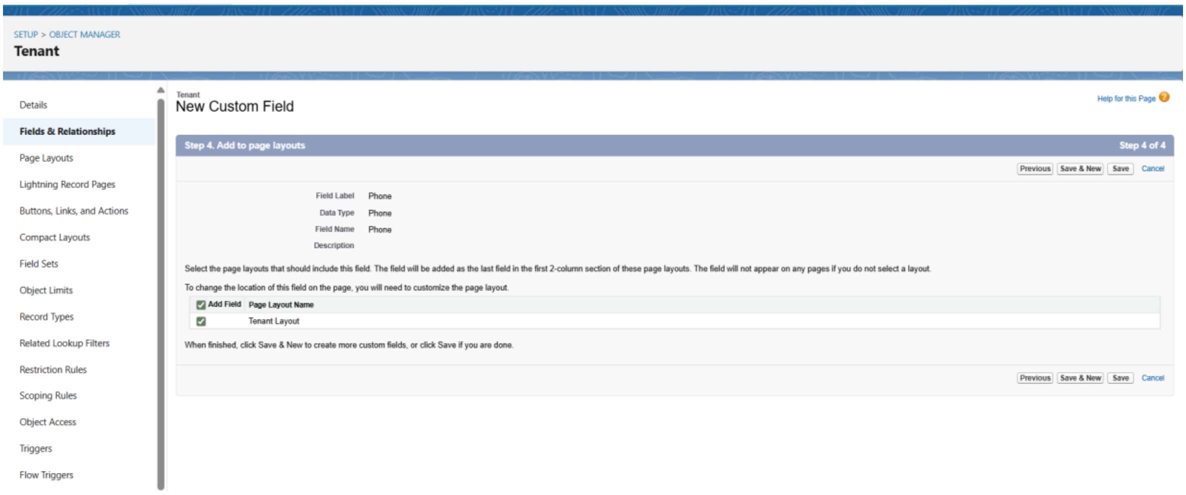
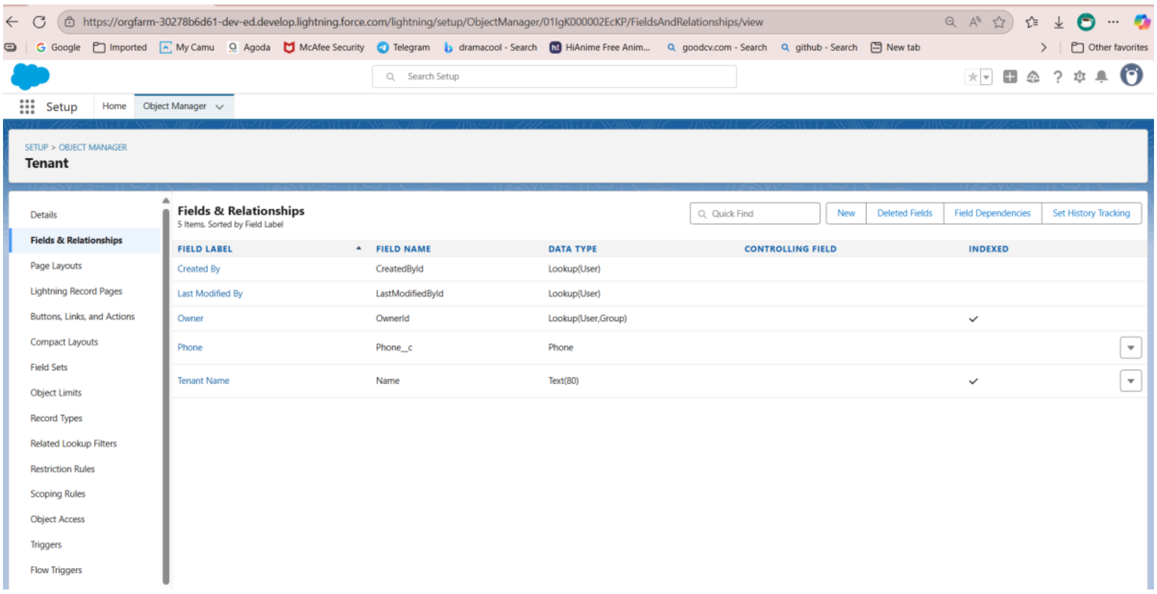
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Object Access
Triggers
Flow Triggers
Validation Rules
Tenant
New Custom Field
Help for this Page
Step 2. Enter the details
Step 2 of 4
Previous
Next
Cancel
Field Label
Phone
Field Name
Phone
Description
Help Text
Required
Always require a value in this field in order to save a record
Auto add to custom report type
Add this field to existing custom report types that contain this entity
Default Value
Show Formula Editor
Previous
Next
Cancel


Tenant
New Custom Field
Help for this Page
Step 3. Establish field-level security
Step 3 of 4
Previous
Next
Cancel
Field Label Phone
Data Type Phone
Field Name Phone
Description
Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.
Field-Level Security for Profile
Visible
Read-Only
Analytics Cloud Integration User
Analytics Cloud Security User
Anypoint Integration
Authenticated Website
Authenticated Website
B2B Reordering Portal Buyer Profile
Contract Manager
Cross Org Data Proxy User
Custom: Marketing Profile
Custom: Sales Profile
Custom: Support Profile


SETUP > OBJECT MANAGER
Tenant
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Object Access
Triggers
Flow Triggers
Tenant
New Custom Field
Help for this Page
Step 4. Add to page layouts
Step 4 of 4
Previous
Save & New
Save
Cancel
Field Label Phone
Data Type Phone
Field Name Phone
Description
Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.
To change the location of this field on the page, you will need to customize the page layout.
Add Field
Page Layout Name
Tenant Layout
When finished, click Save & New to create more custom fields, or click Save if you are done.
Previous
Save & New
Save
Cancel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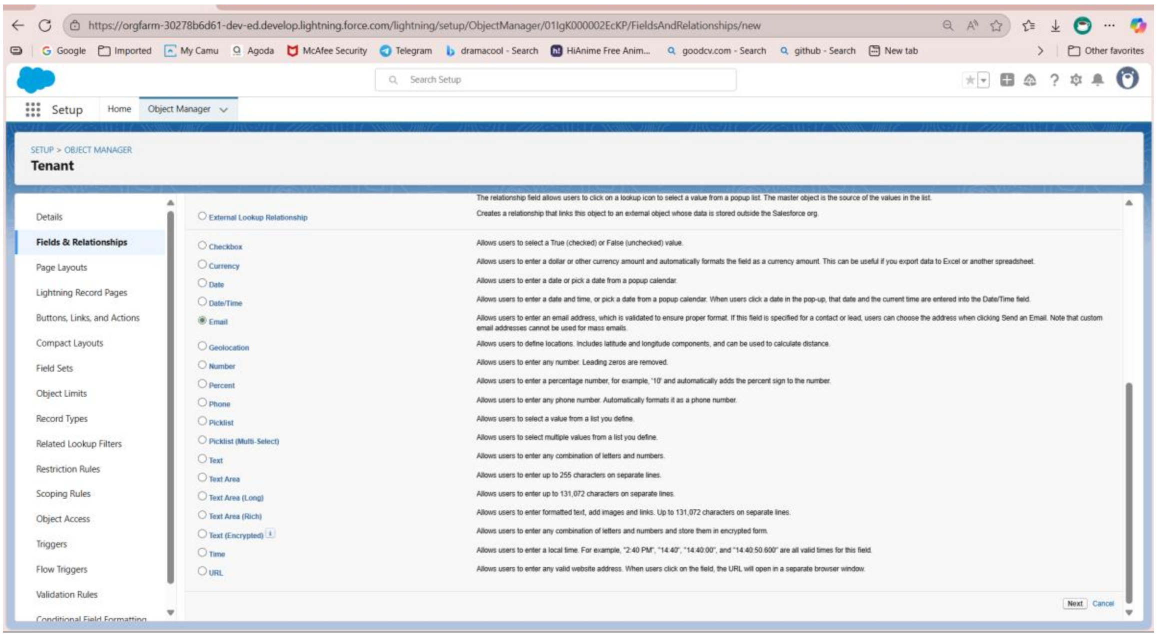
Google
Imported
My Camu
Agoda
McAfee Security
Telegram
dramacool - Search
HiAnime Free Anim...
goodcv.com - Search
github - Search
New tab
Other favorites
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Tenant
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Object Access
Triggers
Flow Triggers
Fields & Relationships
5 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Created By
CreatedById
Lookup(User)
Last Modified By
LastModifiedById
Lookup(User)
Owner
OwnerId
Lookup(User,Group)
Phone
Phone__c
Phone
Tenant Name
Name
Text(80)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Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Tenant
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
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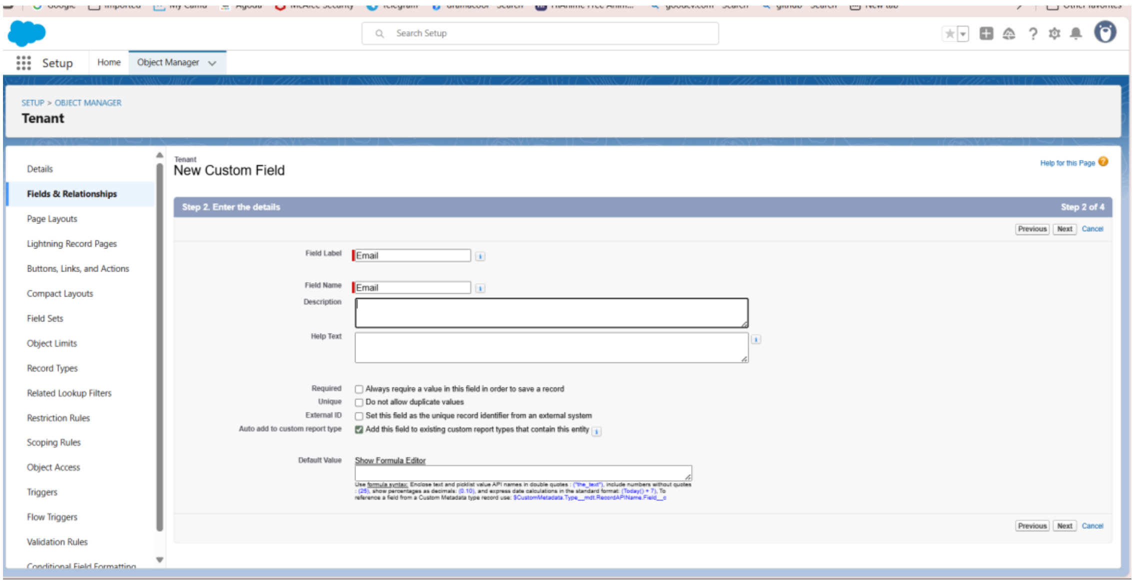
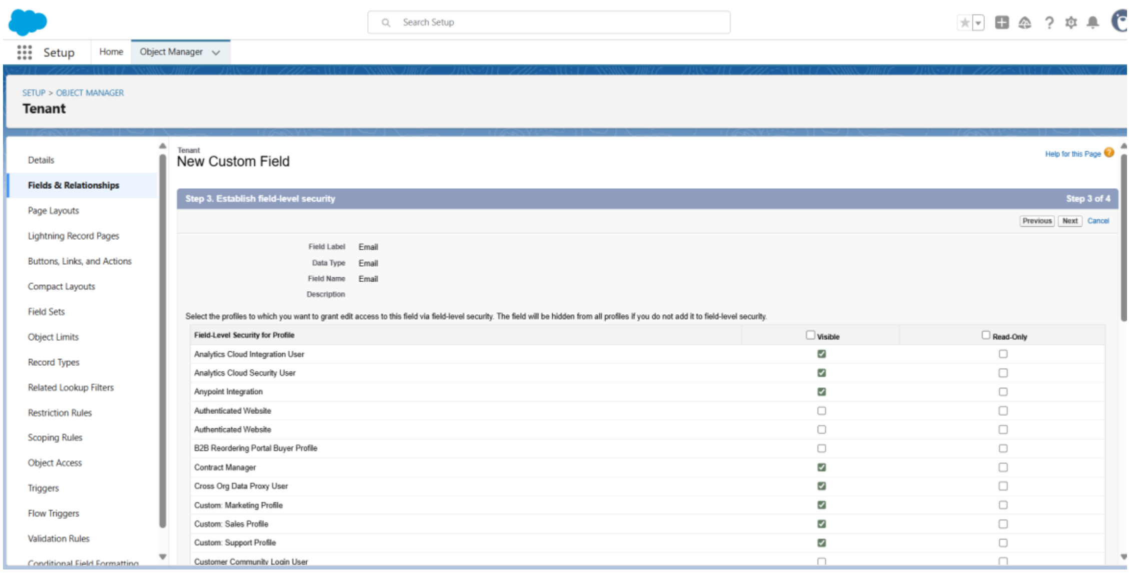
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Object Access
Triggers
Flow Triggers
Validation Rules
External Lookup Relationship
Checkbox
Currency
Date
Date/Time
Email
Geolocation
Number
Percent
Phone
Picklist
Picklist (Multi-Select)
Text
Text Area
Text Area (Long)
Text Area (Rich)
Text (Encrypted)
Time
URL
Next
Cancel


Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Tenant
New Custom Field
Help for this Page
Step 2. Enter the details
Step 2 of 4
Previous
Next
Cancel
Field Label
Email
Field Name
Email
Description
Help Text
Required
Always require a value in this field in order to save a record
Unique
Do not allow duplicate values
External ID
Set this field as the unique record identifier from an external system
Auto add to custom report type
Add this field to existing custom report types that contain this entity
Default Value
Show Formula Editor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Home
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New Custom Field
Help for this Page
Step 3. Establish field-level security
Step 3 of 4
Previous
Next
Cancel
Field Label
Email
Data Type
Email
Field Name
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Field-Level Security for Profile
Visible
Read-Only
Analytics Cloud Integration User
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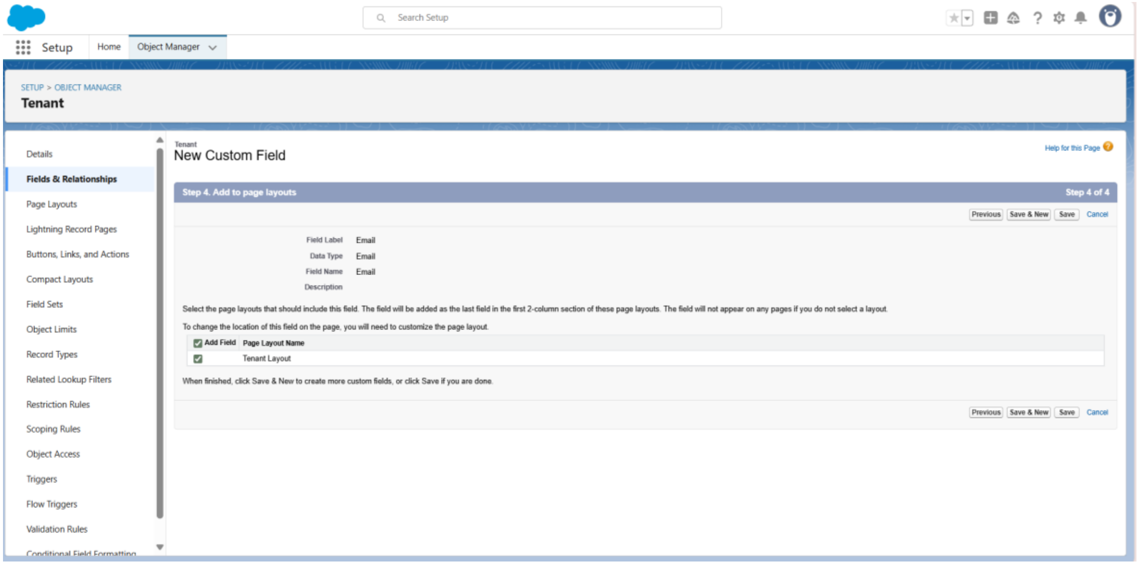

Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Tenant
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
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Object Access
Triggers
Flow Triggers
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Step 4. Add to page layouts
Step 4 of 4
Previous
Save & New
Save
Cancel
Field Label Email
Data Type Email
Field Name Email
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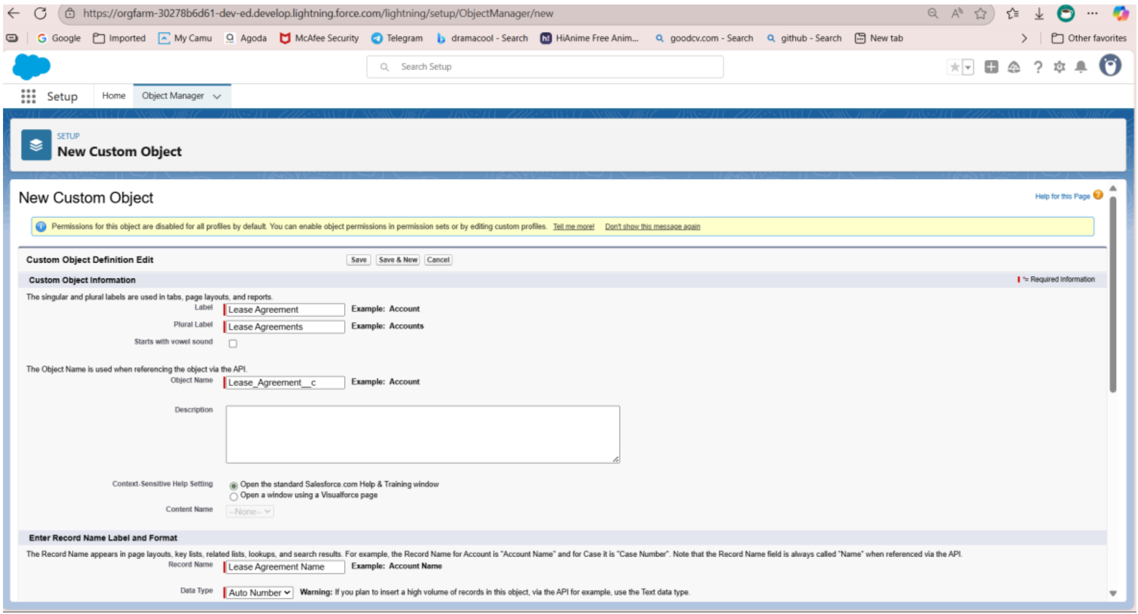

https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new
Search Setup
Setup
Home
Object Manager
SETUP
New Custom Object
New Custom Object
Help for this Page
Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles.
Tell me more!
Don't show this message again
Custom Object Definition Edit
Save
Save & New
Cancel
Custom Object Information
= Required Information
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Lease Agreement
Example: Account
Plural Label
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Example: Accounts
Starts with vowel sound
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Object Name
Lease_Agreement__c
Example: Account
Description
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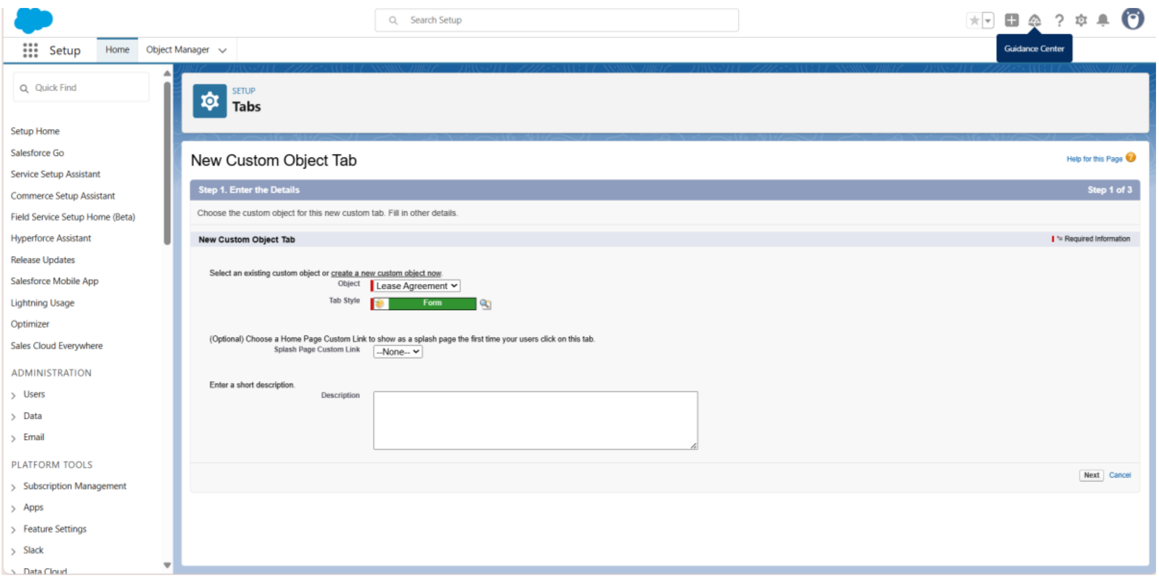
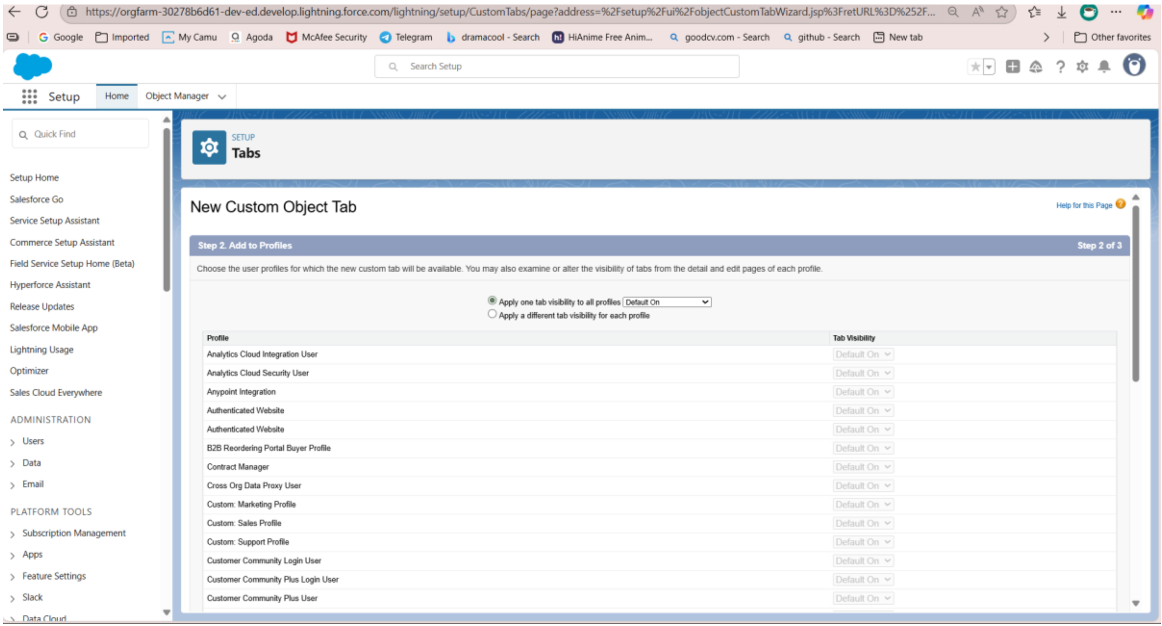
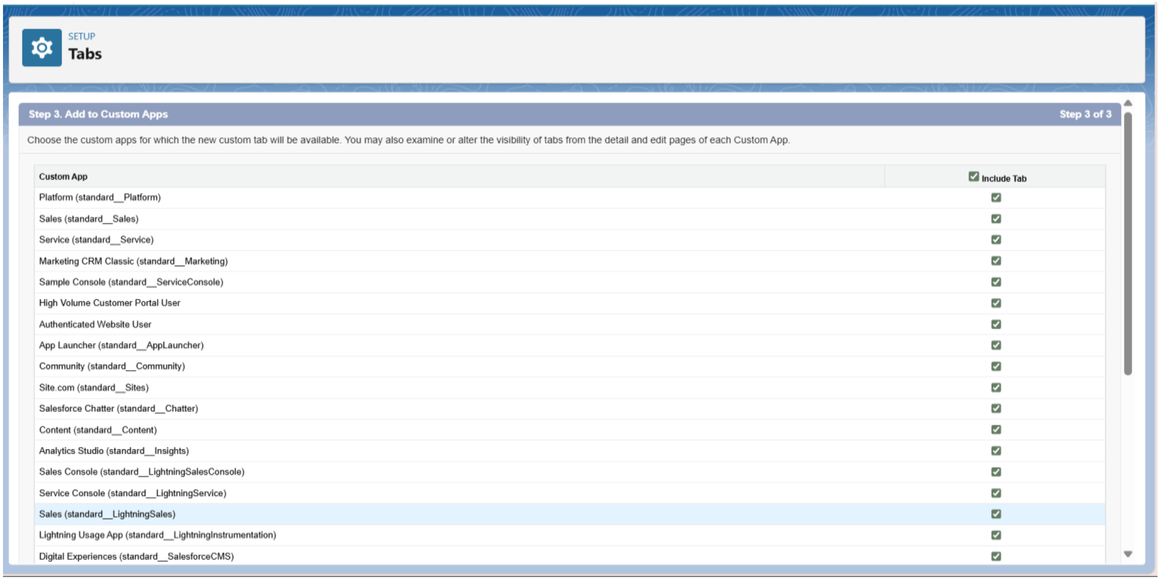
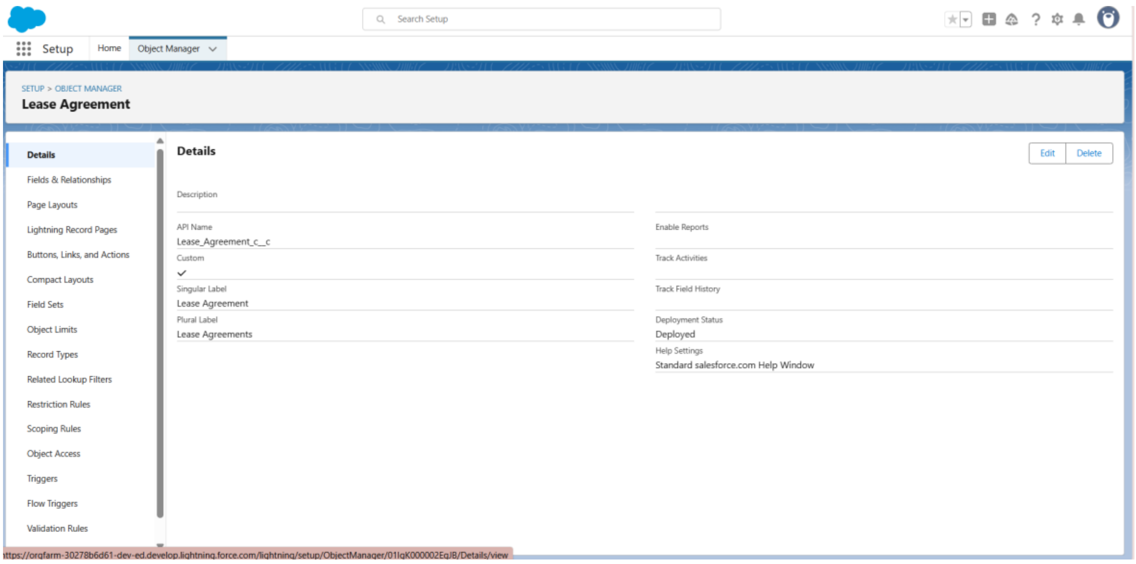
Open a window using a Visualforce page
Content Name
--None--
Enter Record Name Label and Format
The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referencing via the API.
Record Name
Lease Agreement Name
Example: Account Name
Data Type
Auto Number
Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.

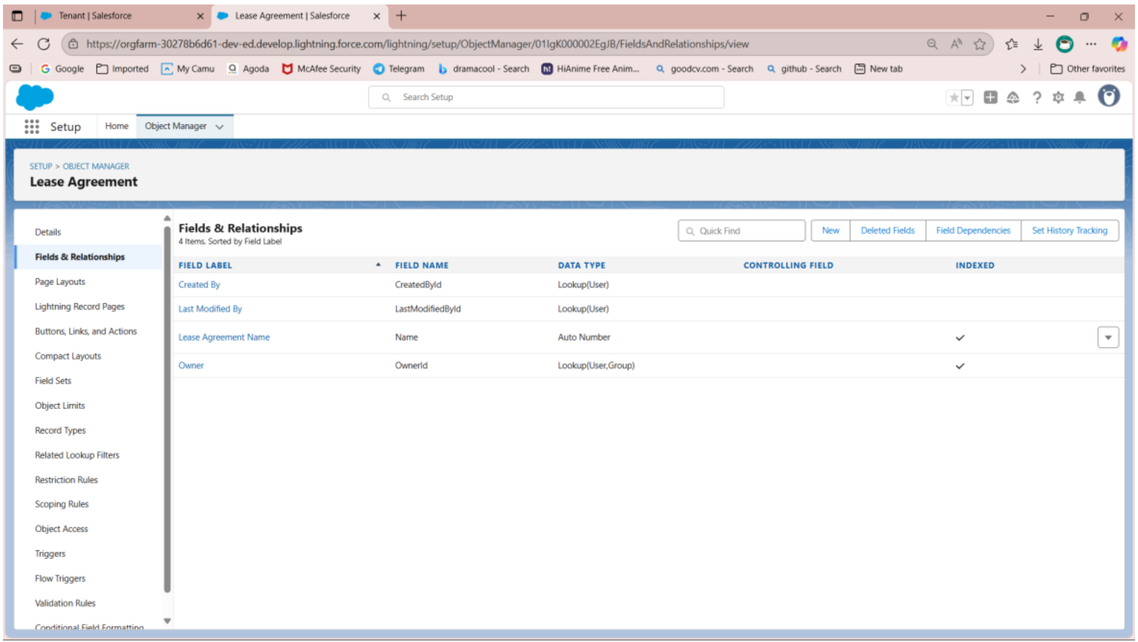


Search Setup
Guidance Center
Setup
Home
Object Manager
Quick Find
Setup Home
Salesforce Go
Service Setup Assistant
Commerce Setup Assistant
Field Service Setup Home (Beta)
Hyperforce Assistant
Release Updates
Salesforce Mobile App
Lightning Usage
Optimizer
Sales Cloud Everywhere
ADMINISTRATION
Users
Data
Email
PLATFORM TOOLS
Subscription Management
Apps
Feature Settings
Slack
SETUP
Tabs
New Custom Object Tab
Help for this Page
Step 1. Enter the Details
Step 1 of 3
Choose the custom object for this new custom tab. Fill in other details.
New Custom Object Tab
= Required Information
Select an existing custom object or create a new custom object now.
Object
Lease Agreement
Tab Style
Form
(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.
Splash Page Custom Link
--None--
Enter a short description.
Description
Next
Cancel

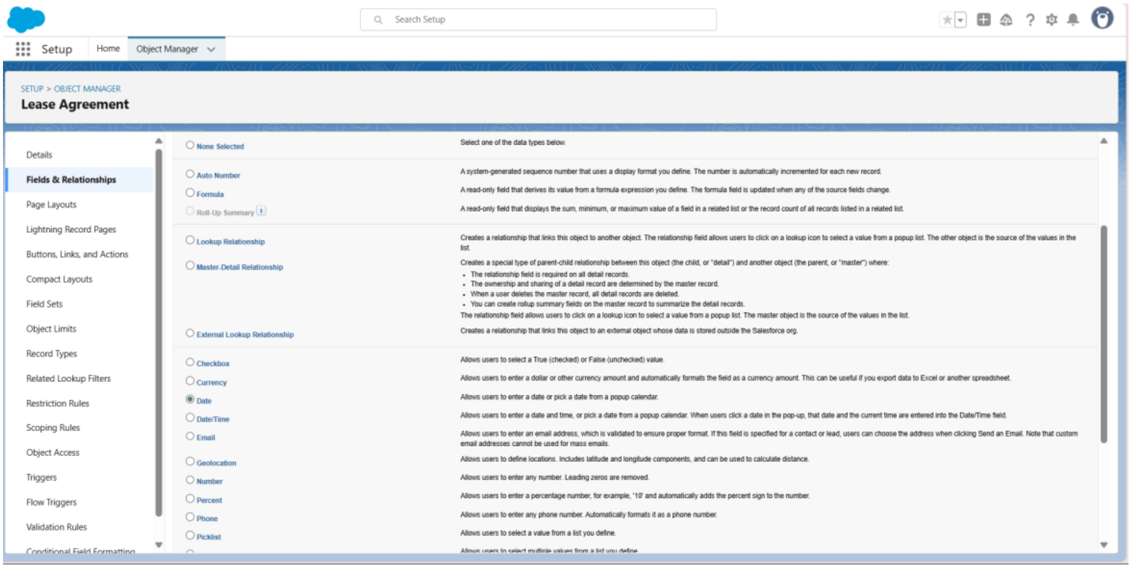

SETUP
Tabs
New Custom Object Tab
Help for this Page
Step 2. Add to Profiles
Step 2 of 3
Choose the user profiles for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each profile.
Apply one tab visibility to all profiles Default On
Apply a different tab visibility for each profile
Profile
Tab Visibility
Analytics Cloud Integration User
Analytics Cloud Security User
Anypoint Integration
Authenticated Website
Authenticated Website
B2B Reordering Portal Buyer Profile
Contract Manager
Cross Org Data Proxy User
Custom: Marketing Profile
Custom: Sales Profile
Custom: Support Profile
Customer Community Login User
Customer Community Plus Login User
Customer Community Plus User
Setup Home
Salesforce Go
Service Setup Assistant
Commerce Setup Assistant
Field Service Setup Home (Beta)
Hyperforce Assistant
Release Updates
Salesforce Mobile App
Lightning Usage
Optimizer
Sales Cloud Everywhere
ADMINISTRATION
Users
Data
Email
PLATFORM TOOLS
Subscription Management
Apps
Feature Settings
Slack


SETUP
Tabs
Step 3. Add to Custom Apps
Step 3 of 3
Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.
Custom App
Include Tab
Platform (standard__Platform)
Sales (standard__Sales)
Service (standard__Service)
Marketing CRM Classic (standard__Marketing)
Sample Console (standard__ServiceConsole)
High Volume Customer Portal User
Authenticated Website User
App Launcher (standard__AppLauncher)
Community (standard__Community)
Site.com (standard__Sites)
Salesforce Chatter (standard__Chatter)
Content (standard__Content)
Analytics Studio (standard__Insights)
Sales Console (standard__LightningSalesConsole)
Service Console (standard__LightningService)
Sales (standard__LightningSales)
Lightning Usage App (standard__LightningInstrumentation)
Digital Experiences (standard__SalesforceCMS)

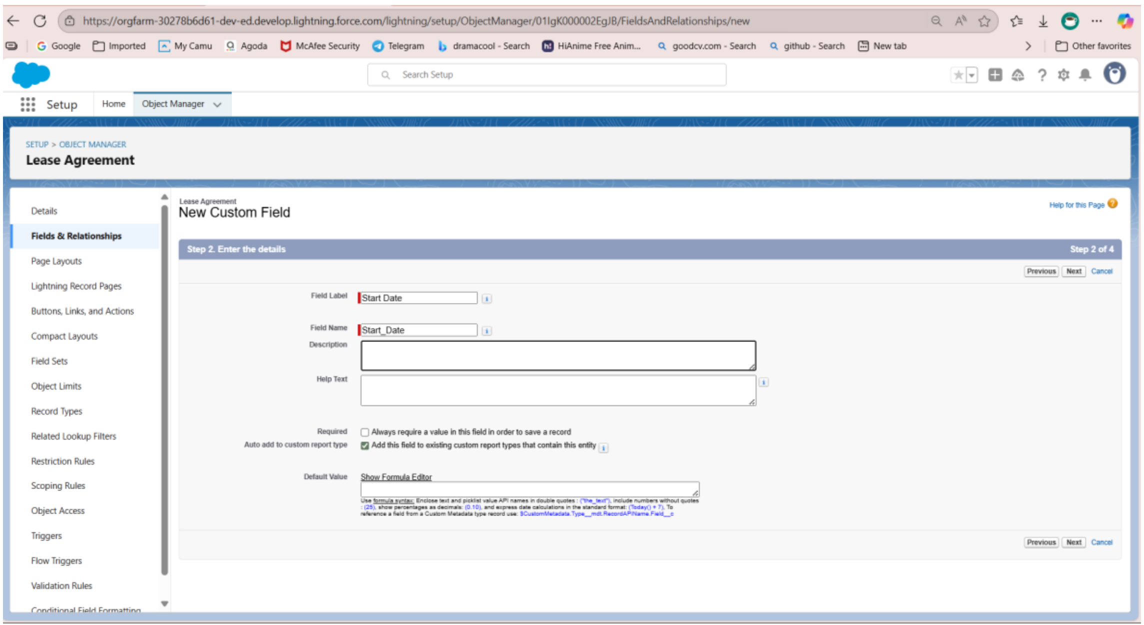

Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Lease Agreement
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Object Access
Triggers
Flow Triggers
Validation Rules
Details
Edit
Delete
Description
API Name
Lease_Agreement_c_c
Custom
Singular Label
Lease Agreement
Plural Label
Lease Agreements
Enable Reports
Track Activities
Track Field History
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window



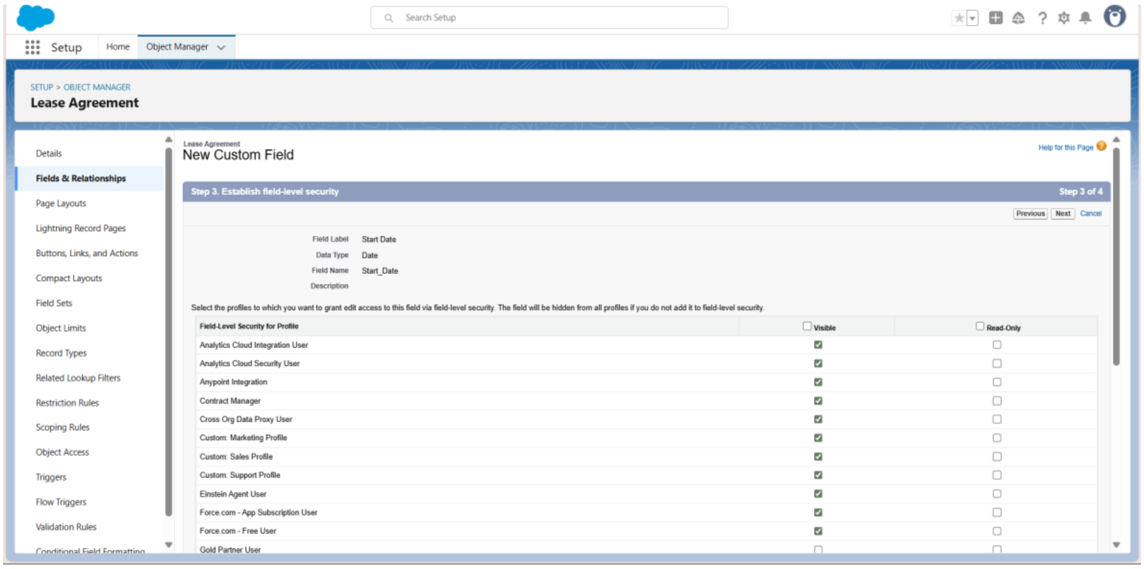
Tenant | Salesforce
Lease Agreement | Salesforce
https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgK000002EgJB/FieldsAndRelationships/view
Google Imported My Camu Agoda McAfee Security Telegram dramacool - Search HiAnime Free Anim... goodcv.com - Search github - Search New tab Other favorites
Search Setup
Setup Home Object Manager
SETUP > OBJECT MANAGER
Lease Agreement
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Object Access
Triggers
Flow Triggers
Validation Rules
Fields & Relationships
4 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL FIELD NAME DATA TYPE CONTROLLING FIELD INDEXED
Created By CreatedById Lookup(User)
Last Modified By LastModifiedById Lookup(User)
Lease Agreement Name Name Auto Number
Owner OwnerId Lookup(User,Group)

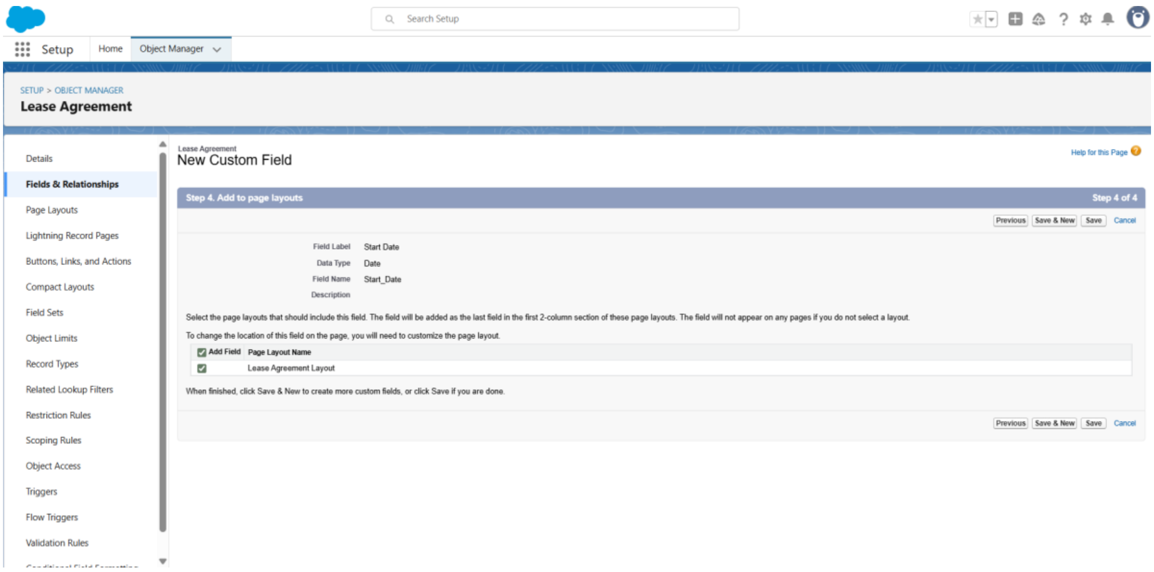


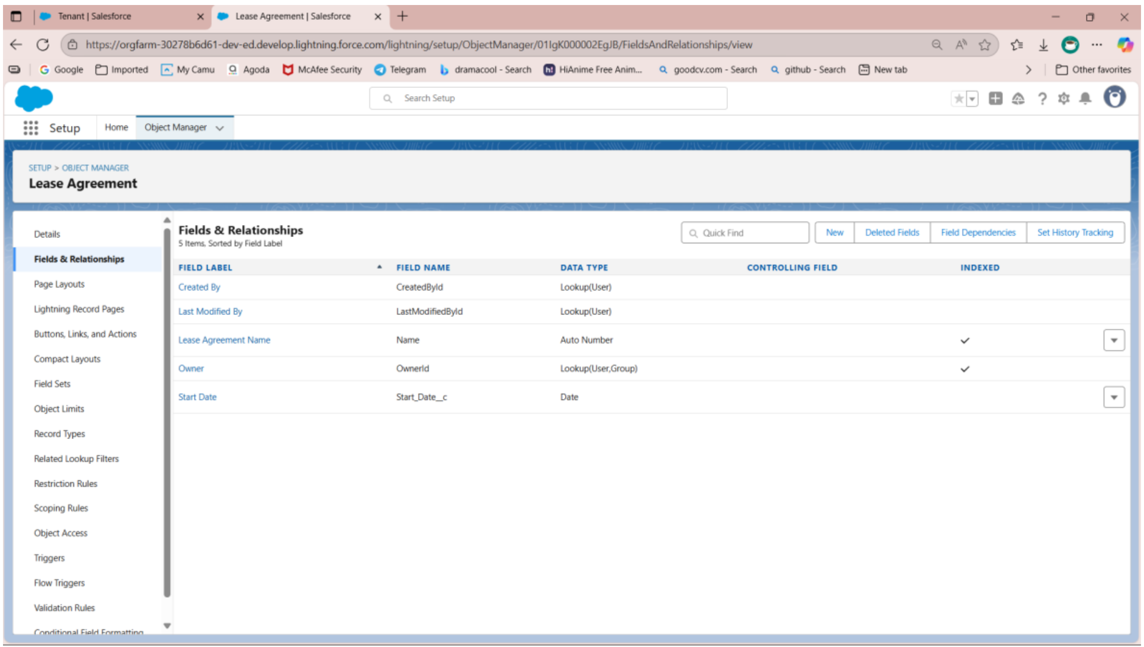
Search Setup
Setup Home Object Manager
SETUP > OBJECT MANAGER
Lease Agreement
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Object Access
Triggers
Flow Triggers
Validation Rules
None Selected
Select one of the data types below.
Auto Number
Formula
Roll-Up Summary
Lookup Relationship
Master-Detail Relationship
External Lookup Relationship
Checkbox
Currency
Date
Date/Time
Email
Geolocation
Number
Percent
Phone
Picklist

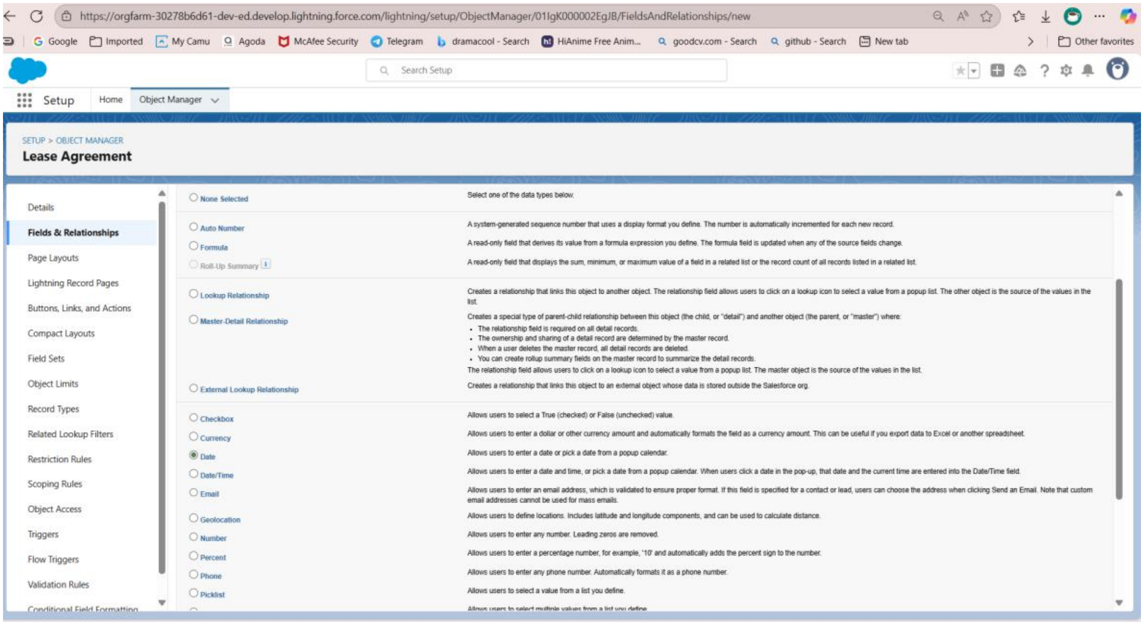


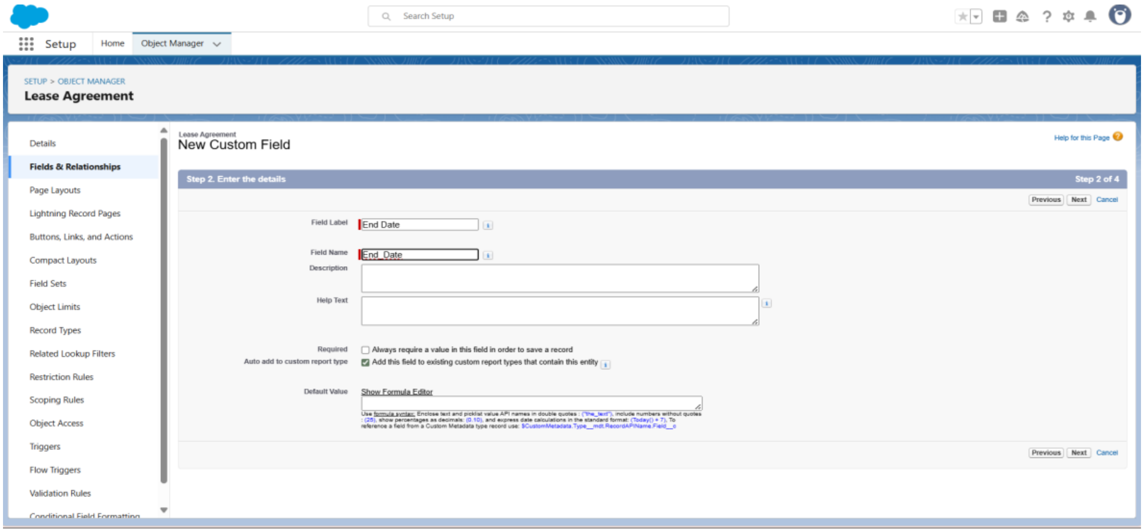
https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgK000002EgJB/FieldsAndRelationships/new
Search Setup
Setup Home Object Manager
SETUP > OBJECT MANAGER
Lease Agreement
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Object Access
Triggers
Flow Triggers
Validation Rules
Lease Agreement
New Custom Field
Help for this Page
Step 2. Enter the details
Step 2 of 4
Previous Next Cancel
Field Label Start Date
Field Name Start_Date
Description
Help Text
Required Always require a value in this field in order to save a record
Auto add to custom report type Add this field to existing custom report types that contain this entity
Default Value Show Formula Editor
Previous Next Cancel

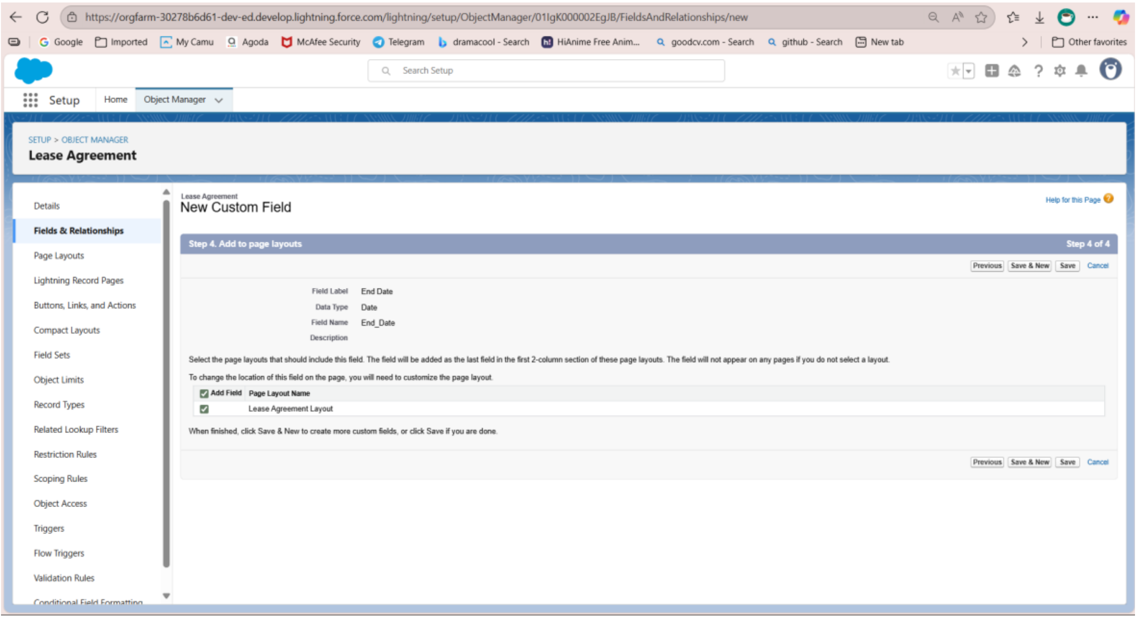

Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Lease Agreement
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Object Access
Triggers
Flow Triggers
Validation Rules
Lease Agreement
New Custom Field
Help for this Page
Step 3. Establish field-level security
Step 3 of 4
Previous
Next
Cancel
Field Label Start Date
Data Type Date
Field Name Start_Date
Description
Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.
Field-Level Security for Profile
Visible
Read-Only
Analytics Cloud Integration User
Analytics Cloud Security User
Anypoint Integration
Contract Manager
Cross Org Data Proxy User
Custom: Marketing Profile
Custom: Sales Profile
Custom: Support Profile
Einstein Agent User
Force.com - App Subscription User
Force.com - Free User
Gold Partner User

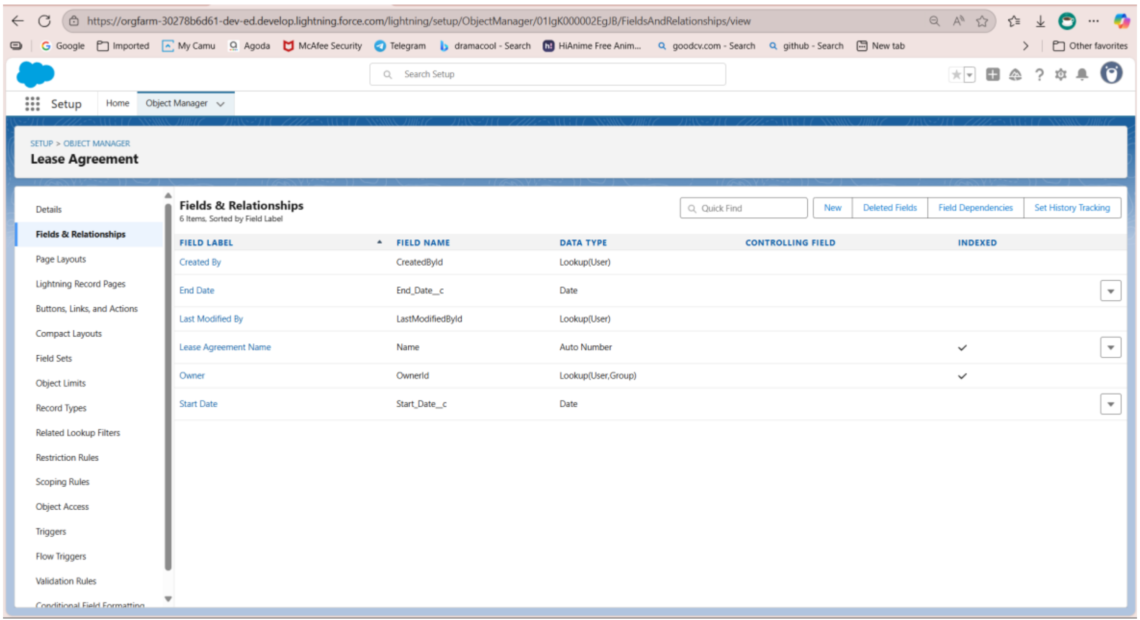

Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Lease Agreement
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Object Access
Triggers
Flow Triggers
Validation Rules
Lease Agreement
New Custom Field
Help for this Page
Step 4. Add to page layouts
Step 4 of 4
Previous
Save & New
Save
Cancel
Field Label Start Date
Data Type Date
Field Name Start_Date
Description
Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.
To change the location of this field on the page, you will need to customize the page layout.
Add Field
Page Layout Name
Lease Agreement Layout
When finished, click Save & New to create more custom fields, or click Save if you are done.

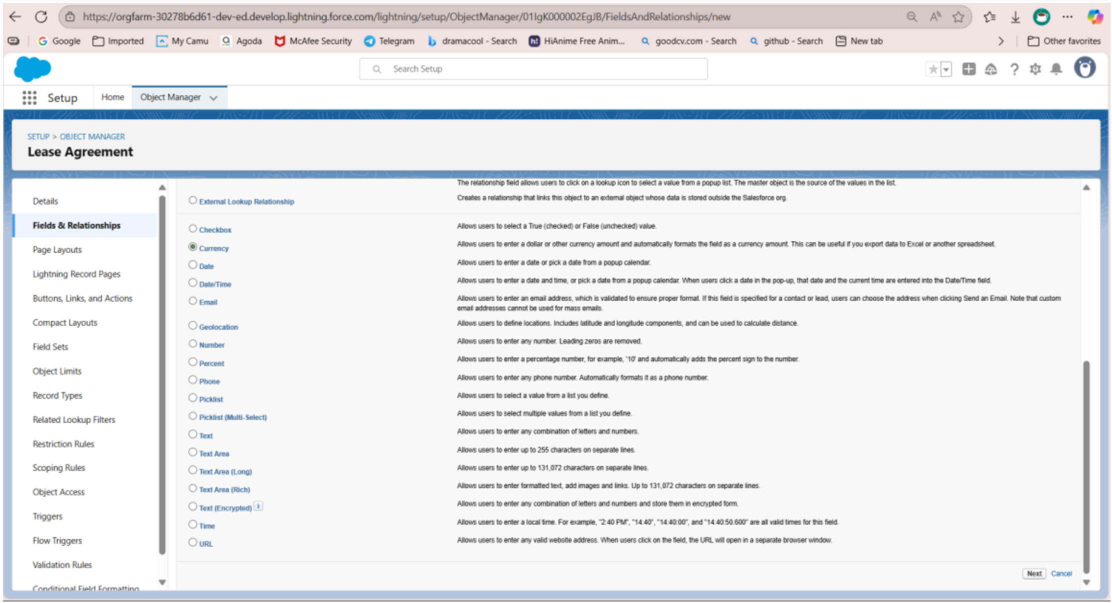

Tenant | Salesforce
Lease Agreement | Salesforce
https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgK000002EgJB/FieldsAndRelationships/view
Google
Imported
My Camu
Agoda
McAfee Security
Telegram
dramacool - Search
HiAnime Free Anim...
goodcv.com - Search
github - Search
New tab
Other favorites
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Lease Agreement
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Object Access
Triggers
Flow Triggers
Validation Rules
Fields & Relationships
5 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Created By
CreatedById
Lookup(User)
Last Modified By
LastModifiedById
Lookup(User)
Lease Agreement Name
Name
Auto Number
Owner
OwnerId
Lookup(User,Group)
Start Date
Start_Date__c
Date

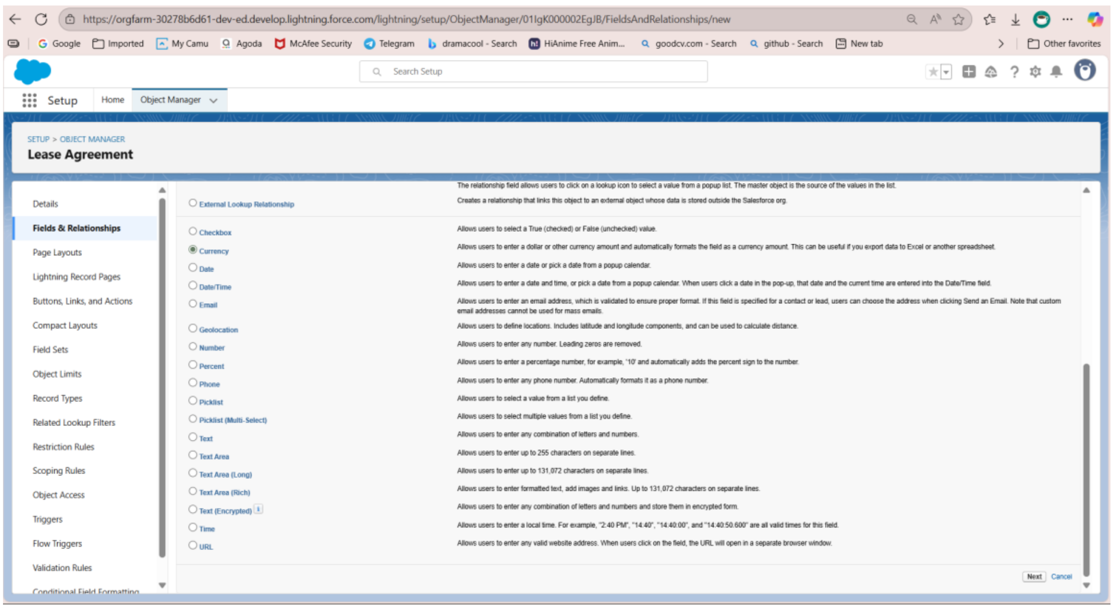

https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgK000002EgJB/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Lease Agreement
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Object Access
Triggers
Flow Triggers
Validation Rules
None Selected
Select one of the data types below.
Auto Number
Formula
Roll-Up Summary
Lookup Relationship
Master-Detail Relationship
External Lookup Relationship
Checkbox
Currency
Date
Date/Time
Email
Geolocation
Number
Percent
Phone
Picklist
Allows users to select a date or pick a date from a popup calendar.

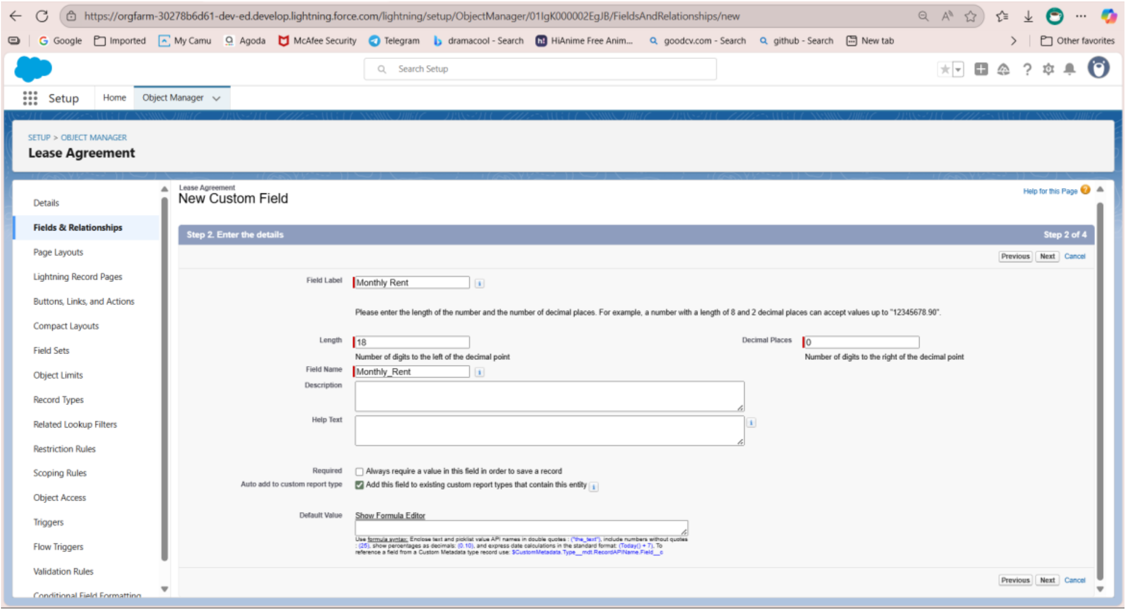

Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Lease Agreement
Lease Agreement
New Custom Field
Help for this Page
Step 2. Enter the details
Step 2 of 4
Previous
Next
Cancel
Field Label
End Date
Field Name
End_Date
Description
Help Text
Required
Always require a value in this field in order to save a record
Auto add to custom report type
Add this field to existing custom report types that contain this entity
Default Value
Show Formula Editor

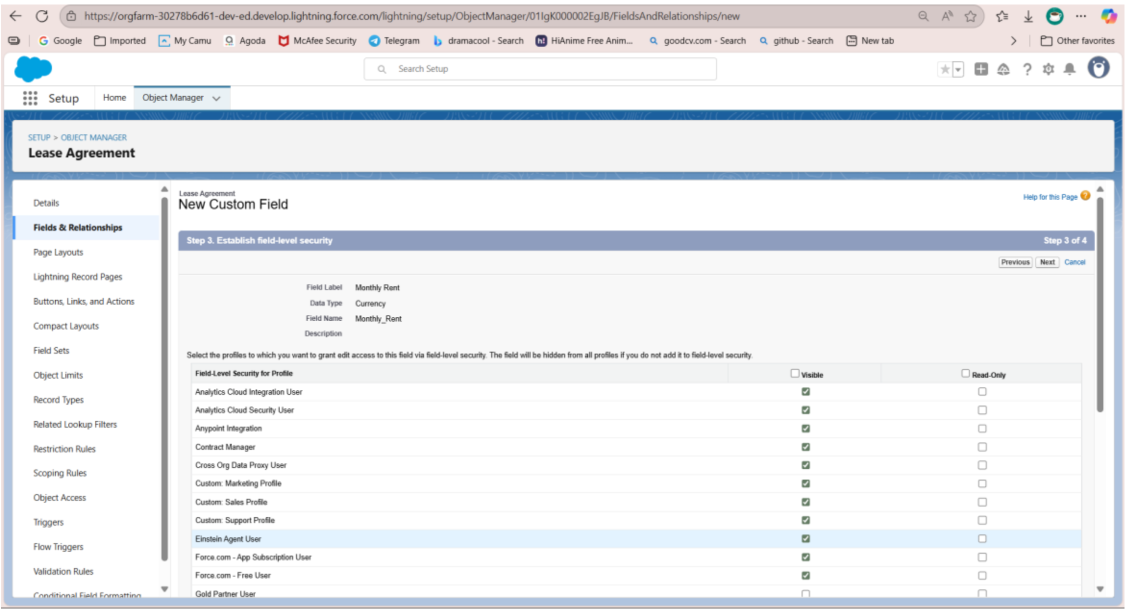

https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgK000002EgJB/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Lease Agreement
Lease Agreement
New Custom Field
Help for this Page
Step 4. Add to page layouts
Step 4 of 4
Previous
Save & New
Save
Cancel
Field Label
End Date
Data Type
Date
Field Name
End_Date
Description
Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.
To change the location of this field on the page, you will need to customize the page layout.
Add Field
Page Layout Name
Lease Agreement Layout
When finished, click Save & New to create more custom fields, or click Save if you are done.

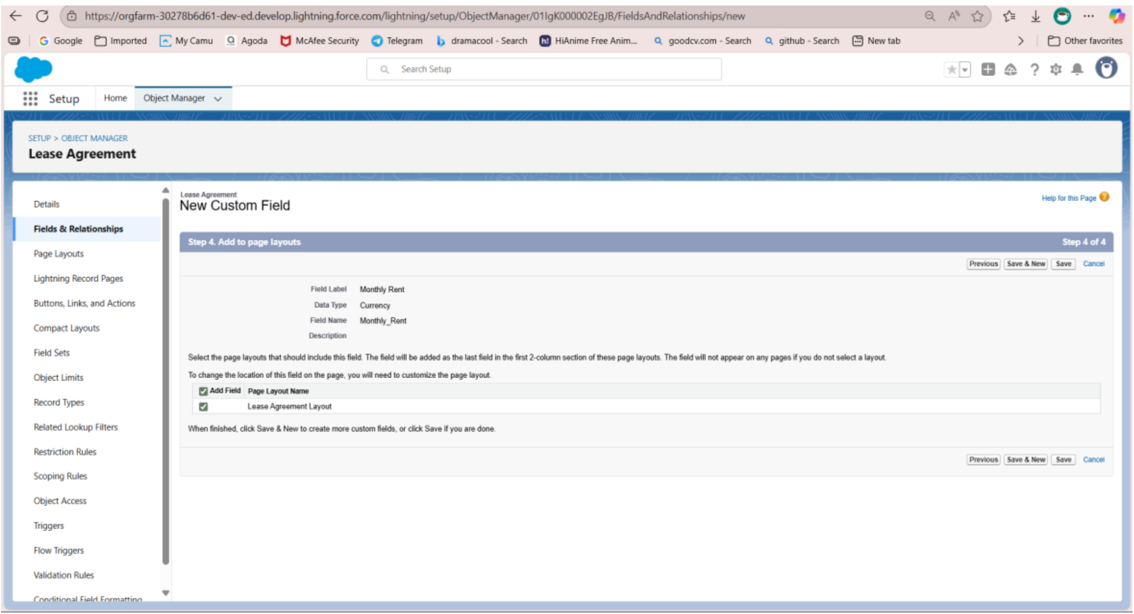

https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgK000002EgJB/FieldsAndRelationships/view
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Lease Agreement
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Object Access
Triggers
Flow Triggers
Validation Rules
Fields & Relationships
6 Items, Sorted by Field Label
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Created By
CreatedById
Lookup(User)
End Date
End_Date__c
Date
Last Modified By
LastModifiedById
Lookup(User)
Lease Agreement Name
Name
Auto Number
Owner
OwnerId
Lookup(User,Group)
Start Date
Start_Date__c
Date

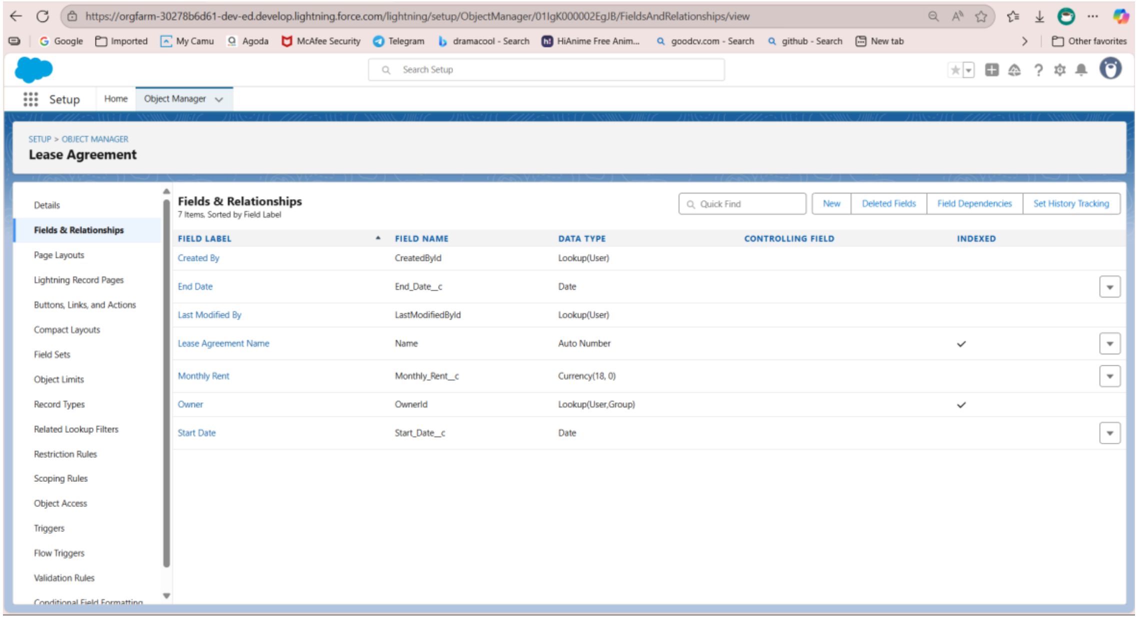

https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgK000002EgJB/FieldsAndRelationships/new
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Lease Agreement
External Lookup Relationship
Checkbox
Currency
Date
Date/Time
Email
Geolocation
Number
Percent
Phone
Picklist
Picklist (Multi-Select)
Text
Text Area
Text Area (Long)
Text Area (Rich)
Text (Encrypted)
Time
URL
Next
Cancel

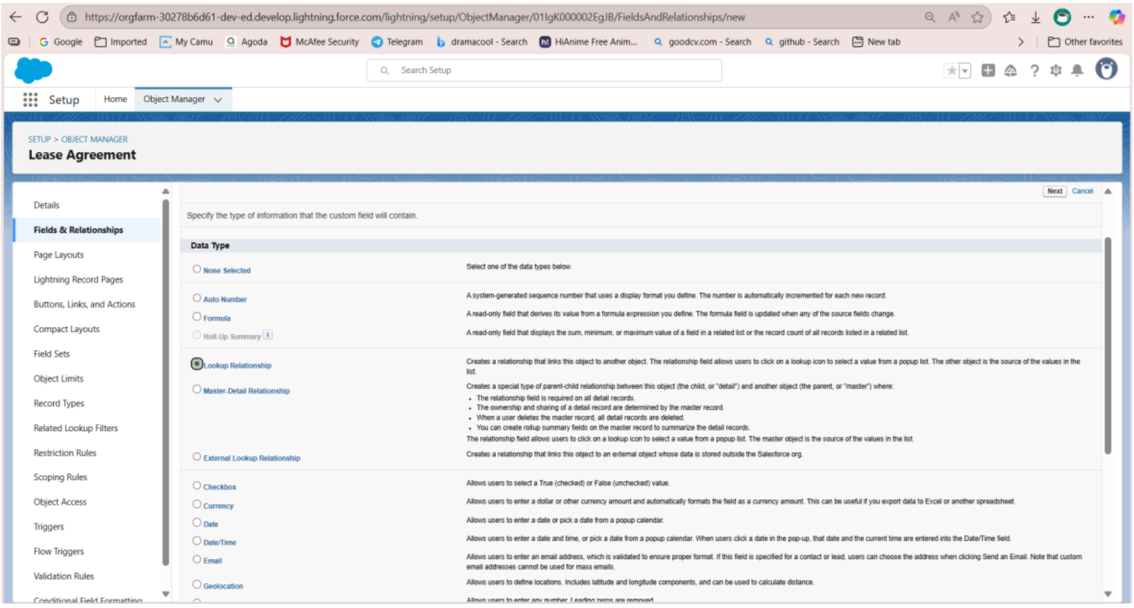

https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgK000002EgJB/FieldsAndRelationships/new
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Lease Agreement
External Lookup Relationship
Checkbox
Currency
Date
Date/Time
Email
Geolocation
Number
Percent
Phone
Picklist
Picklist (Multi-Select)
Text
Text Area
Text Area (Long)
Text Area (Rich)
Text (Encrypted)
Time
URL
Next
Cancel

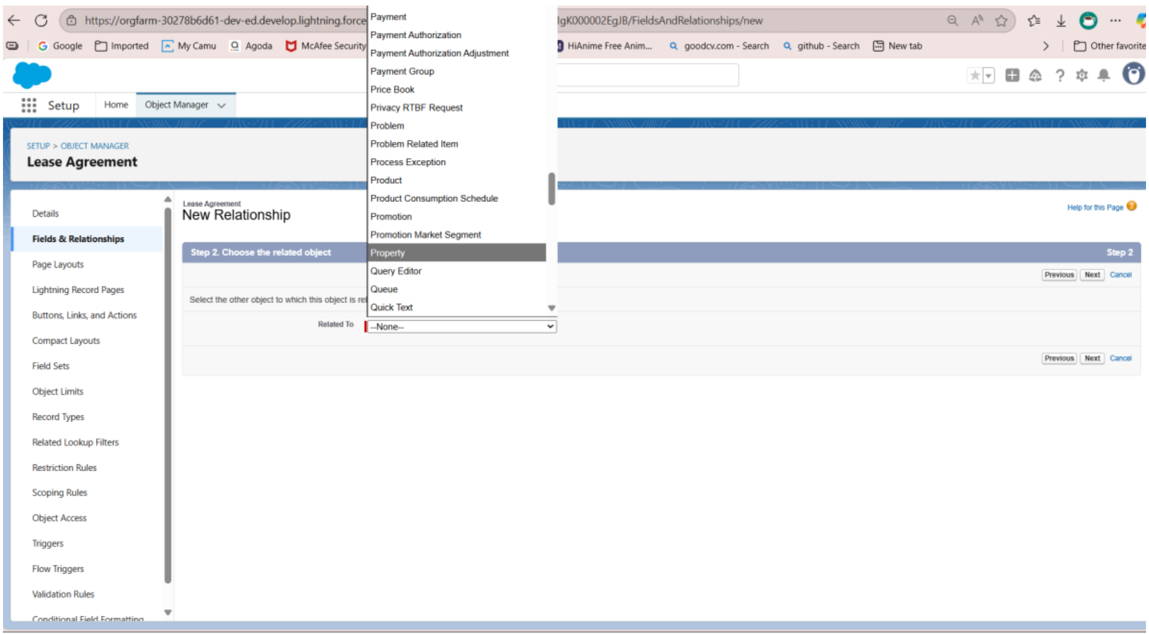

SETUP > OBJECT MANAGER
Lease Agreement
Lease Agreement
New Custom Field
Step 2. Enter the details
Step 2 of 4
Field Label Monthly Rent
Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".
Length 18
Number of digits to the left of the decimal point
Decimal Places 0
Number of digits to the right of the decimal point
Field Name Monthly_Rent
Description
Help Text
Required Always require a value in this field in order to save a record
Auto add to custom report type Add this field to existing custom report types that contain this entity
Default Value Show Formula Editor
Previous Next Cancel

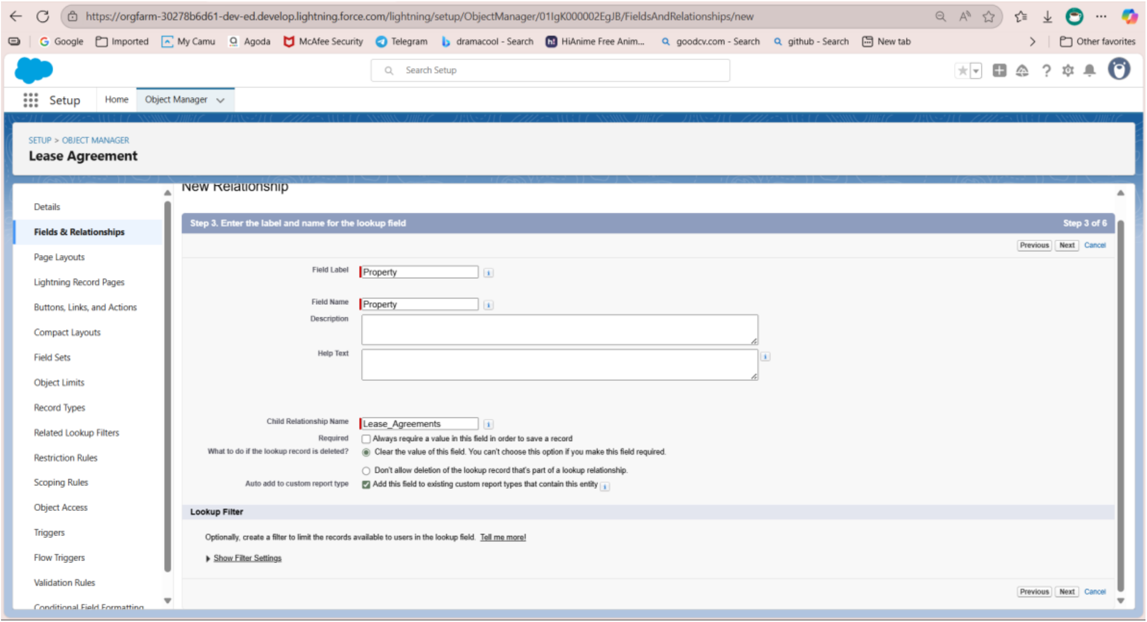

SETUP > OBJECT MANAGER
Lease Agreement
New Custom Field
Step 3. Establish field-level security
Step 3 of 4
Field Label Monthly Rent
Data Type Currency
Field Name Monthly_Rent
Description
Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.
Field-Level Security for Profile
Visible
Read-Only
Analytics Cloud Integration User
Analytics Cloud Security User
Anypoint Integration
Contract Manager
Cross Org Data Proxy User
Custom: Marketing Profile
Custom: Sales Profile
Custom: Support Profile
Einstein Agent User
Force.com - App Subscription User
Force.com - Free User
Gold Partner User

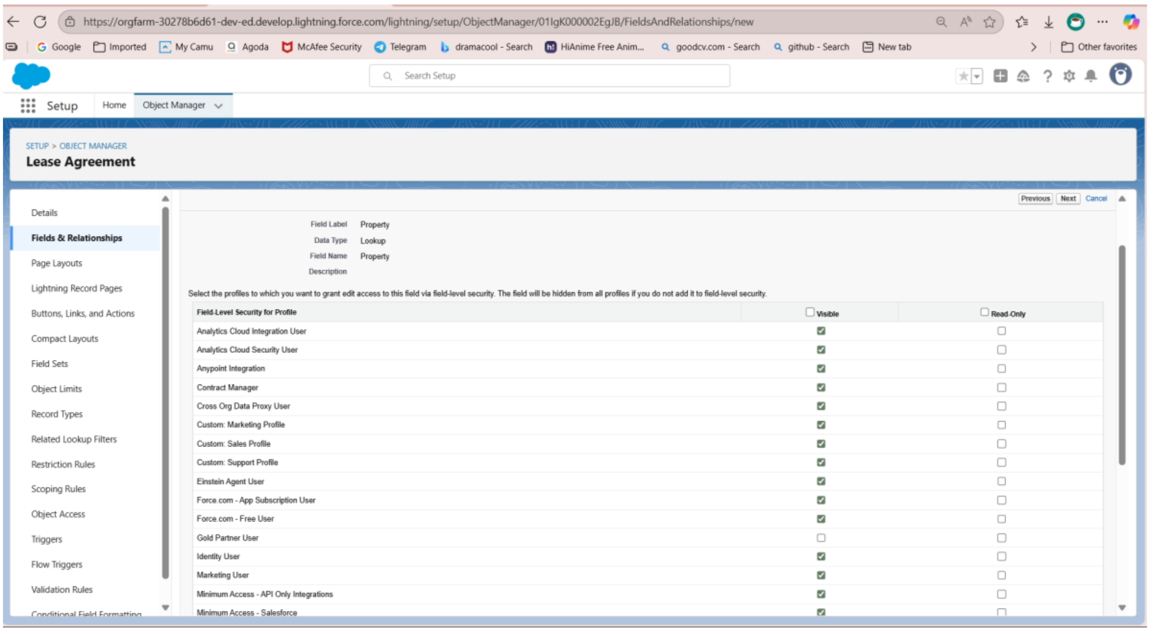

SETUP > OBJECT MANAGER
Lease Agreement
New Custom Field
Step 4. Add to page layouts
Step 4 of 4
Previous Save & New Save Cancel
Field Label Monthly Rent
Data Type Currency
Field Name Monthly_Rent
Description
Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.
To change the location of this field on the page, you will need to customize the page layout.
Add Field Page Layout Name
Lease Agreement Layout
When finished, click Save & New to create more custom fields, or click Save if you are done.

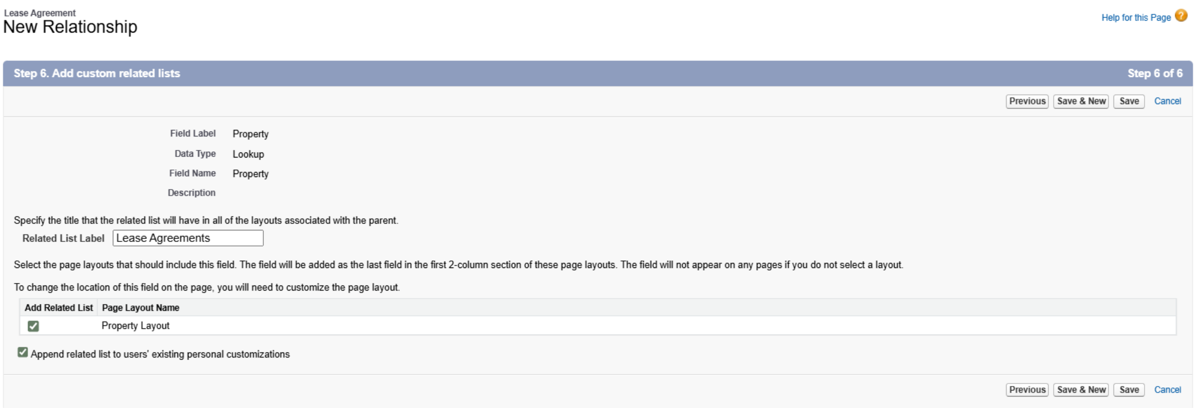

SETUP > OBJECT MANAGER
Lease Agreement
Fields & Relationships
7 Items, Sorted by Field Label
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Created By
CreatedById
Lookup(User)
End Date
End_Date__c
Date
Last Modified By
LastModifiedById
Lookup(User)
Lease Agreement Name
Name
Auto Number
Monthly Rent
Monthly_Rent__c
Currency(18, 0)
Owner
OwnerId
Lookup(User,Group)
Start Date
Start_Date__c
Date

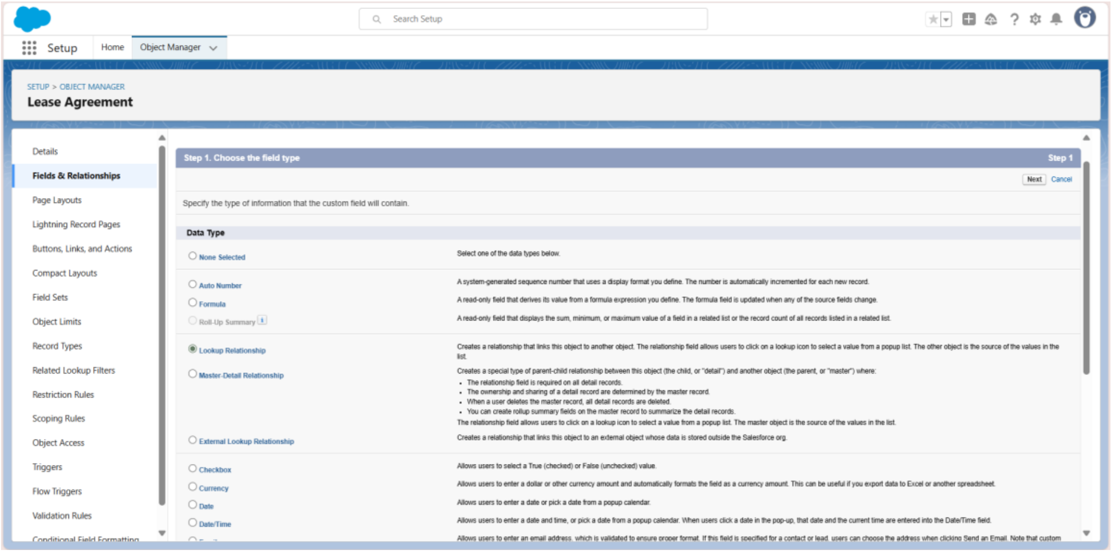

SETUP > OBJECT MANAGER
Lease Agreement
Specify the type of information that the custom field will contain.
Data Type
None Selected
Auto Number
Formula
Roll-Up Summary
Lookup Relationship
Master-Detail Relationship
External Lookup Relationship
Checkbox
Currency
Date
Date/Time
Email
Geolocation

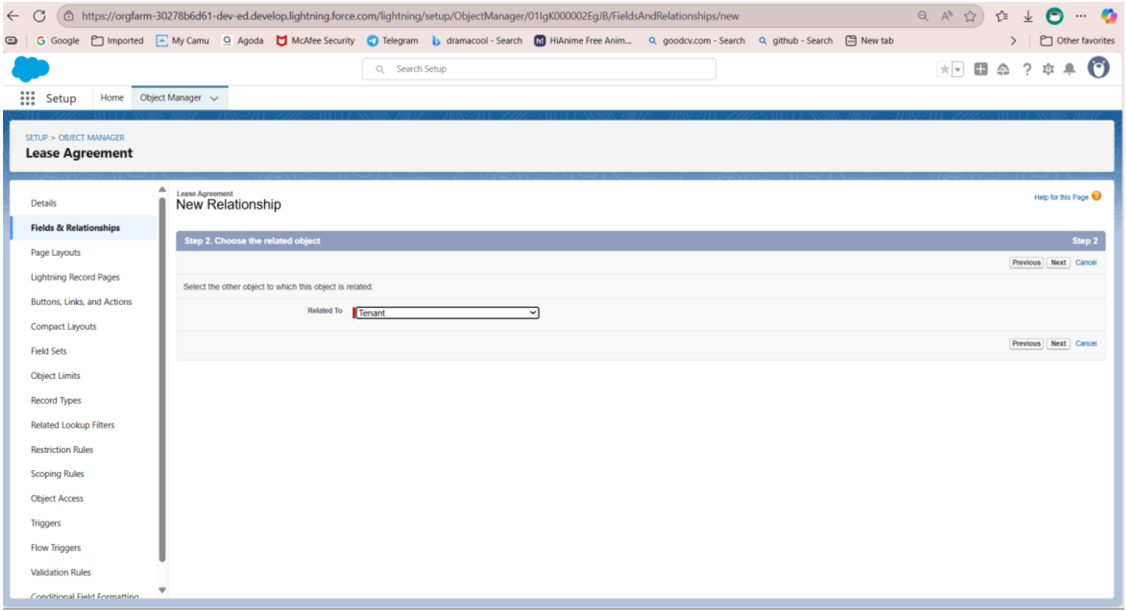

SETUP > OBJECT MANAGER
Lease Agreement
New Relationship
Step 2. Choose the related object
Payment
Payment Authorization
Payment Authorization Adjustment
Payment Group
Price Book
Privacy RTBF Request
Problem
Problem Related Item
Process Exception
Product
Product Consumption Schedule
Promotion
Promotion Market Segment
Property
Query Editor
Queue
Quick Text
Related To
--None--

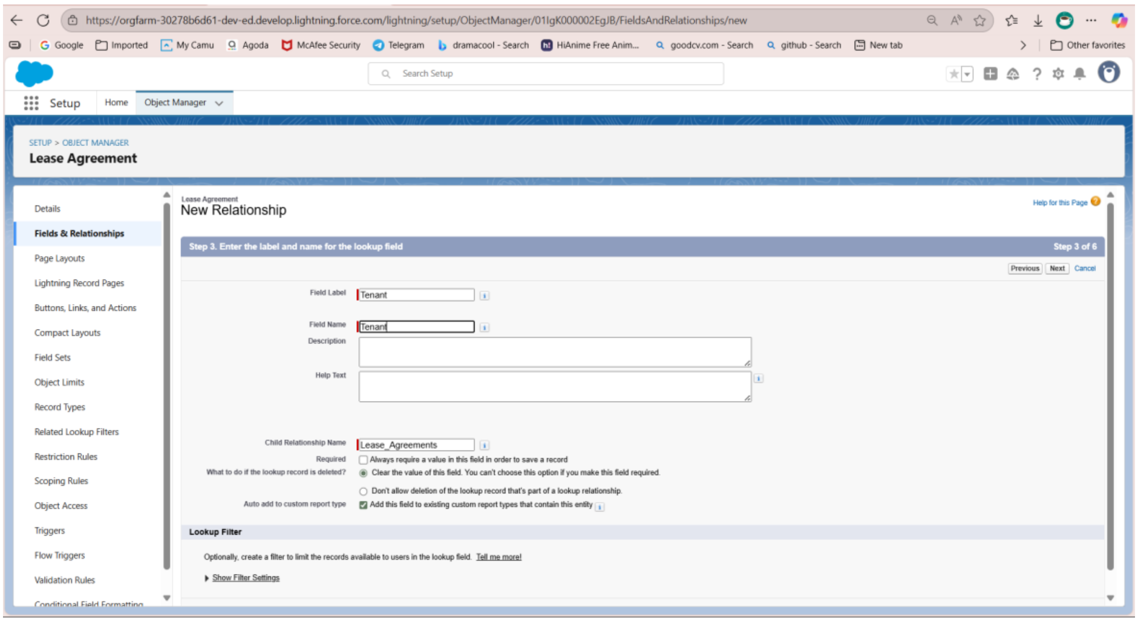

SETUP > OBJECT MANAGER
Lease Agreement
New Relationship
Step 3. Enter the label and name for the lookup field
Step 3 of 6
Field Label
Property
Field Name
Property
Description
Help Text
Child Relationship Name
Lease_Agreements
Required
Always require a value in this field in order to save a record
What to do if the lookup record is deleted?
Clear the value of this field. You can't choose this option if you make this field required.
Don't allow deletion of the lookup record that's part of a lookup relationship.
Auto add to custom report type
Add this field to existing custom report types that contain this entity
Lookup Filter
Optionally, create a filter to limit the records available to users in the lookup field. Tell me more!
Show Filter Settings
Previous
Next
Cancel

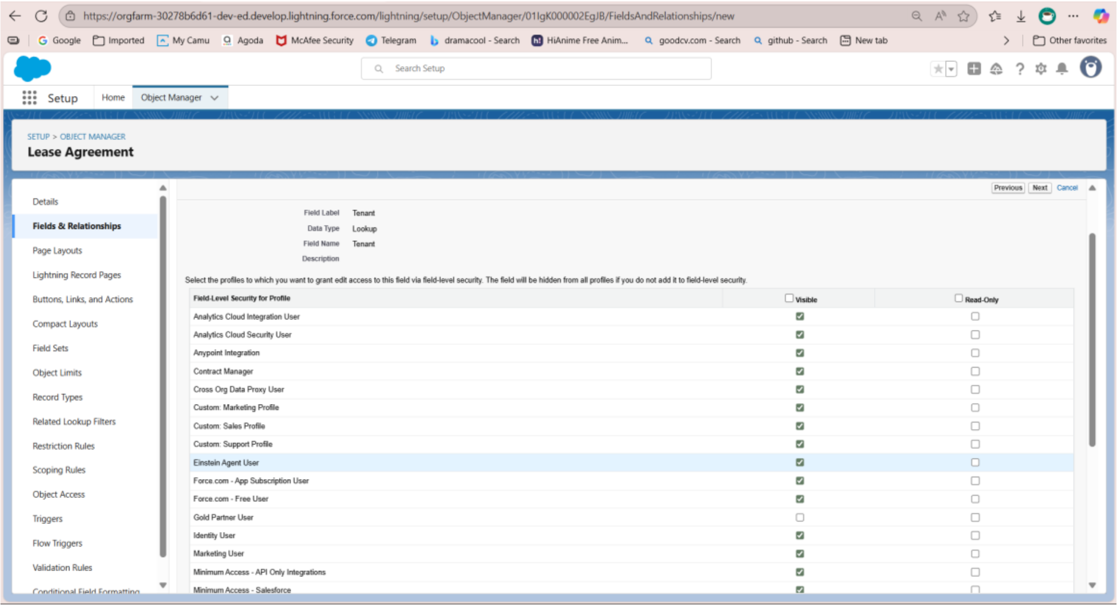

SETUP > OBJECT MANAGER
Lease Agreement
Field Label Property
Data Type Lookup
Field Name Property
Description
Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.
Field-Level Security for Profile
Visible
Read-Only
Analytics Cloud Integration User
Analytics Cloud Security User
Anypoint Integration
Contract Manager
Cross Org Data Proxy User
Custom: Marketing Profile
Custom: Sales Profile
Custom: Support Profile
Einstein Agent User
Force.com - App Subscription User
Force.com - Free User
Gold Partner User
Identity User
Marketing User
Minimum Access - API Only Integrations
Minimum Access - Salesforce

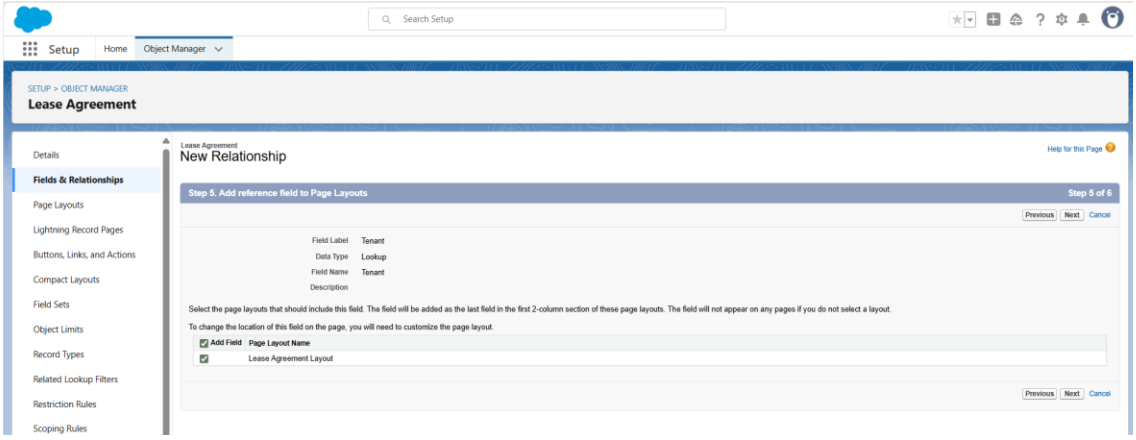

Lease Agreement
New Relationship
Help for this Page
Step 6. Add custom related lists
Step 6 of 6
Previous
Save & New
Save
Cancel
Field Label Property
Data Type Lookup
Field Name Property
Description
Specify the title that the related list will have in all of the layouts associated with the parent.
Related List Label
Lease Agreements
Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.
To change the location of this field on the page, you will need to customize the page layout.
Add Related List
Page Layout Name
Property Layout
Append related list to users' existing personal customizations

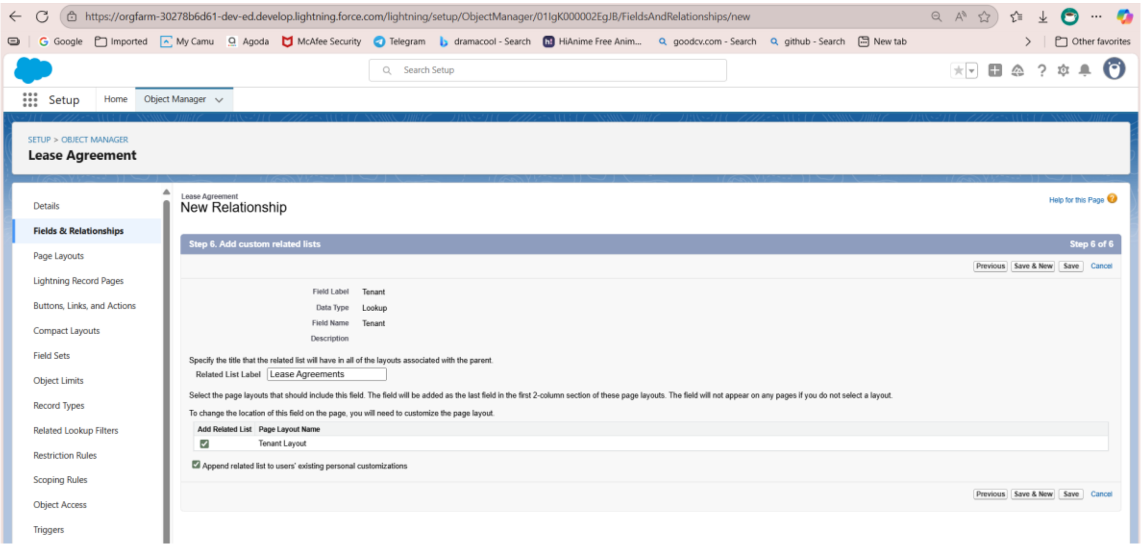

Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Lease Agreement
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Object Access
Triggers
Flow Triggers
Validation Rules
Step 1. Choose the field type
Step 1
Next
Cancel
Specify the type of information that the custom field will contain.
Data Type
None Selected
Select one of the data types below.
Auto Number
A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
Formula
A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
Roll-Up Summary
A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
Lookup Relationship
Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
Master-Detail Relationship
Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
The relationship field is required on all detail records.
The ownership and sharing of a detail record are determined by the master record.
When a user deletes the master record, all detail records are deleted.
You can create rollup summary fields on the master record to summarize the detail records.
The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.
External Lookup Relationship
Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
Checkbox
Allows users to select a True (checked) or False (unchecked) value.
Currency
Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
Date
Allows users to enter a date or pick a date from a popup calendar.
Date/Time
Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.

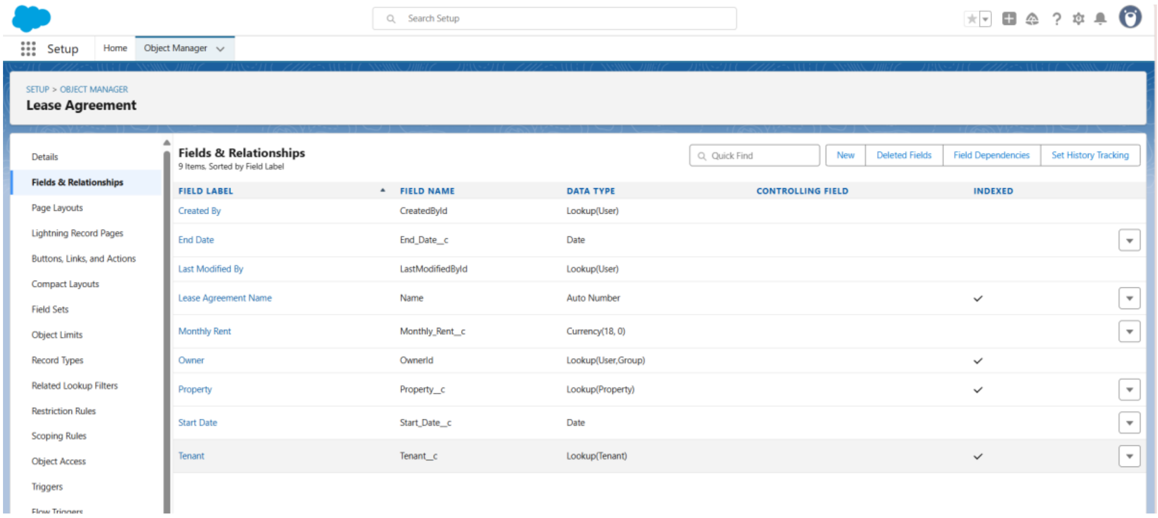

https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgK000002EgJB/FieldsAndRelationships/new
Google
Imported
My Camu
Agoda
McAfee Security
Telegram
dramacool - Search
HiAnime Free Anim...
goodcv.com - Search
github - Search
New tab
Other favorites
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Lease Agreement
Lease Agreement
New Relationship
Help for this Page
Step 2. Choose the related object
Step 2
Previous
Next
Cancel
Select the other object to which this object is related.
Related To
Tenant

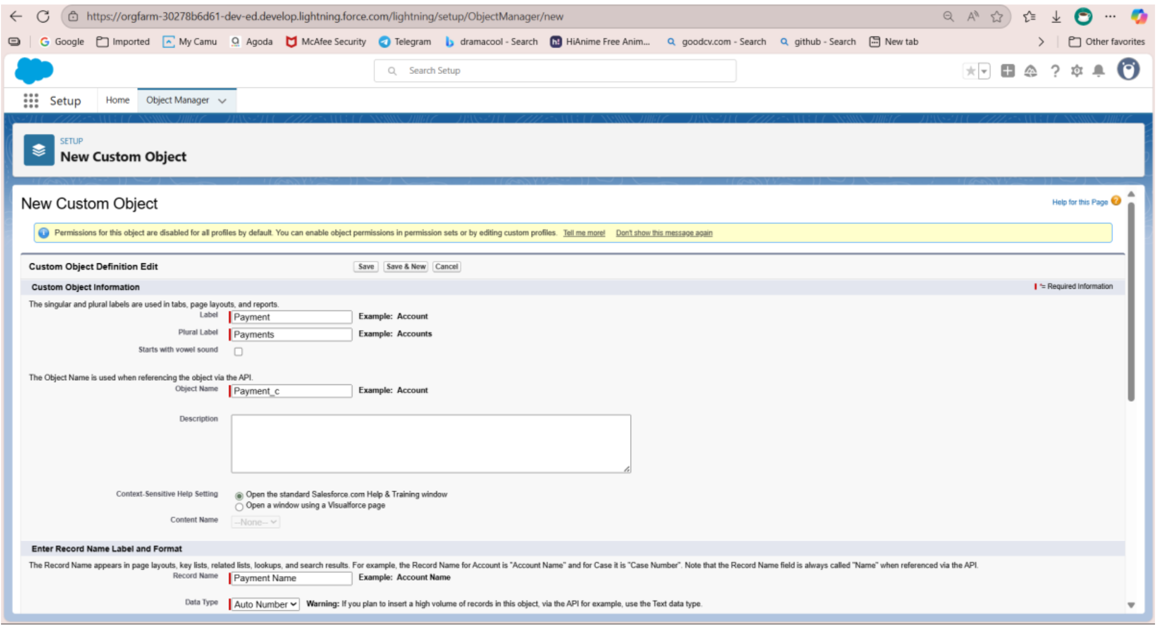

https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgK000002EgJB/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Lease Agreement
Lease Agreement
New Relationship
Help for this Page
Step 3. Enter the label and name for the lookup field
Step 3 of 6
Previous
Next
Cancel
Field Label
Tenant
Field Name
Tenant
Description
Help Text
Child Relationship Name
Lease_Agreements
Required
Always require a value in this field in order to save a record
What to do if the lookup record is deleted?
Clear the value of this field. You can't choose this option if you make this field required.
Don't allow deletion of the lookup record that's part of a lookup relationship.
Auto add to custom report type
Add this field to existing custom report types that contain this entity
Lookup Filter
Optionally, create a filter to limit the records available to users in the lookup field. Tell me more!
Show Filter Settings

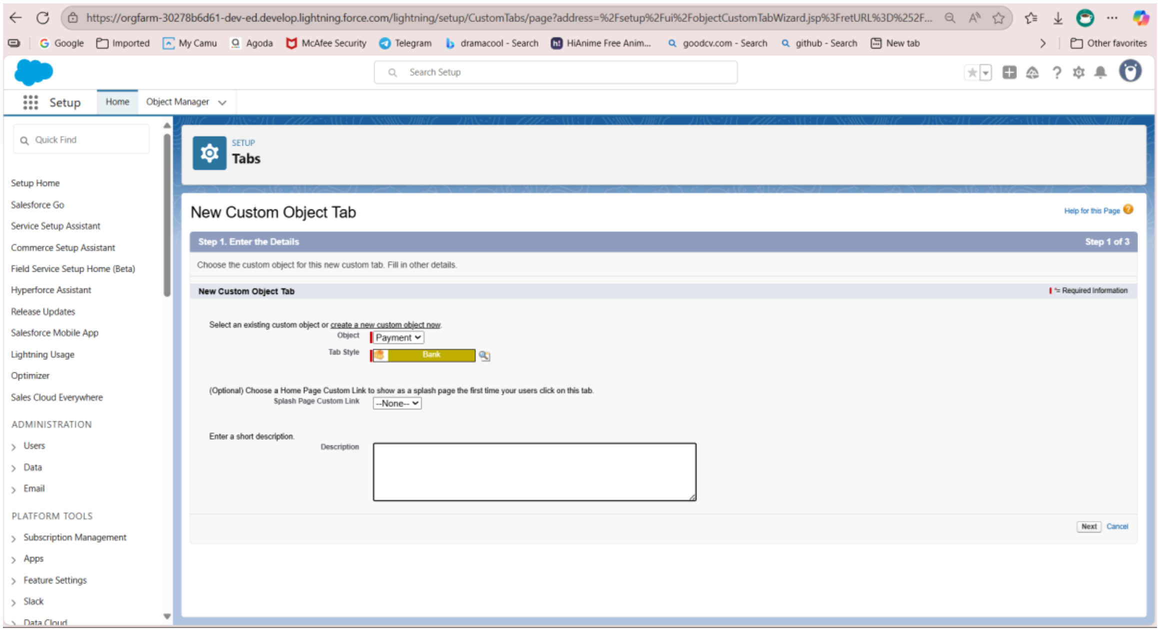

Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Lease Agreement
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Object Access
Triggers
Flow Triggers
Validation Rules
Previous
Next
Cancel
Field Label Tenant
Data Type Lookup
Field Name Tenant
Description
Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.
Field-Level Security for Profile
Visible
Read-Only
Analytics Cloud Integration User
Analytics Cloud Security User
Anypoint Integration
Contract Manager
Cross Org Data Proxy User
Custom: Marketing Profile
Custom: Sales Profile
Custom: Support Profile
Einstein Agent User
Force.com - App Subscription User
Force.com - Free User
Gold Partner User
Identity User
Marketing User
Minimum Access - API Only Integrations
Minimum Access - Salesforce

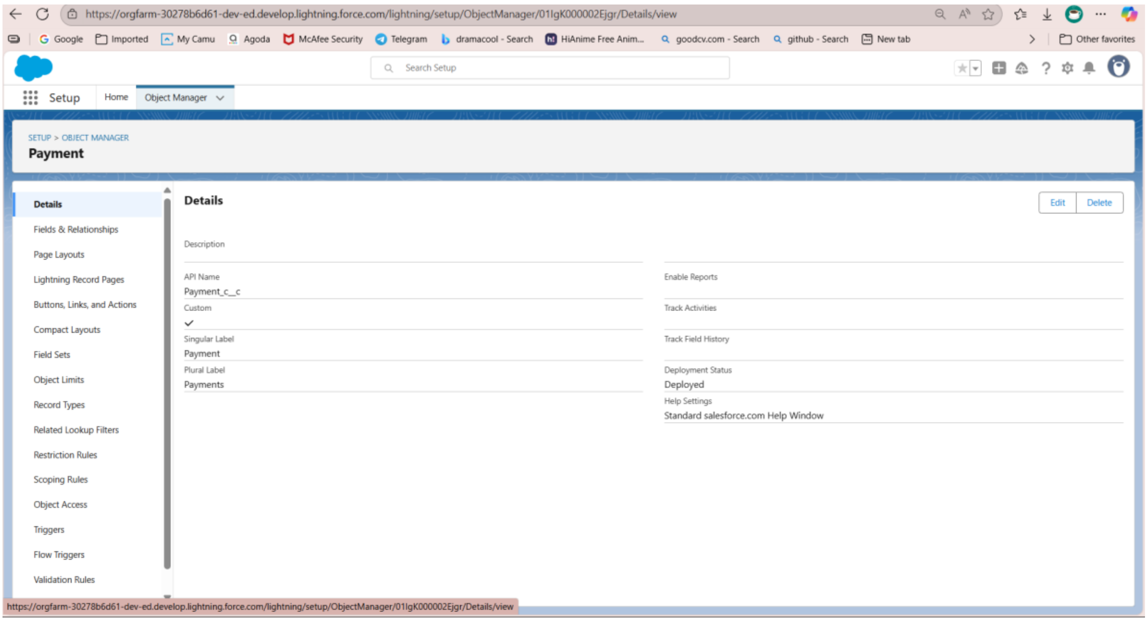

Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Lease Agreement
Lease Agreement
New Relationship
Help for this Page
Step 5. Add reference field to Page Layouts
Step 5 of 6
Previous
Next
Cancel
Field Label Tenant
Data Type Lookup
Field Name Tenant
Description
Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.
To change the location of this field on the page, you will need to customize the page layout.
Add Field
Page Layout Name
Lease Agreement Layout

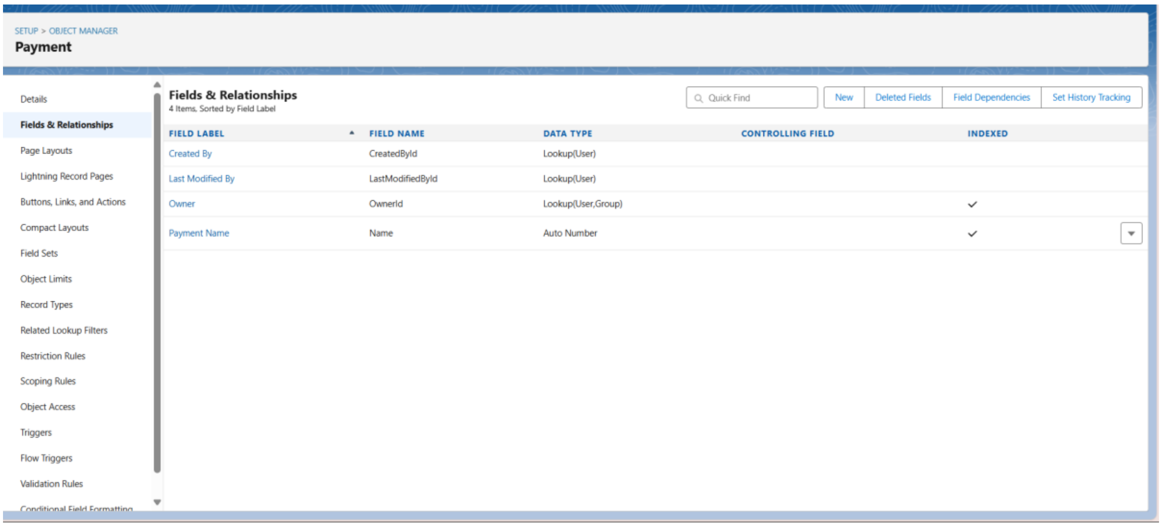

Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Lease Agreement
Lease Agreement
New Relationship
Help for this Page
Step 6. Add custom related lists
Step 6 of 6
Previous
Save & New
Save
Cancel
Field Label Tenant
Data Type Lookup
Field Name Tenant
Description
Specify the title that the related list will have in all of the layouts associated with the parent.
Related List Label
Lease Agreements
Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.
To change the location of this field on the page, you will need to customize the page layout.
Add Related List
Page Layout Name
Tenant Layout
Append related list to users' existing personal customizations

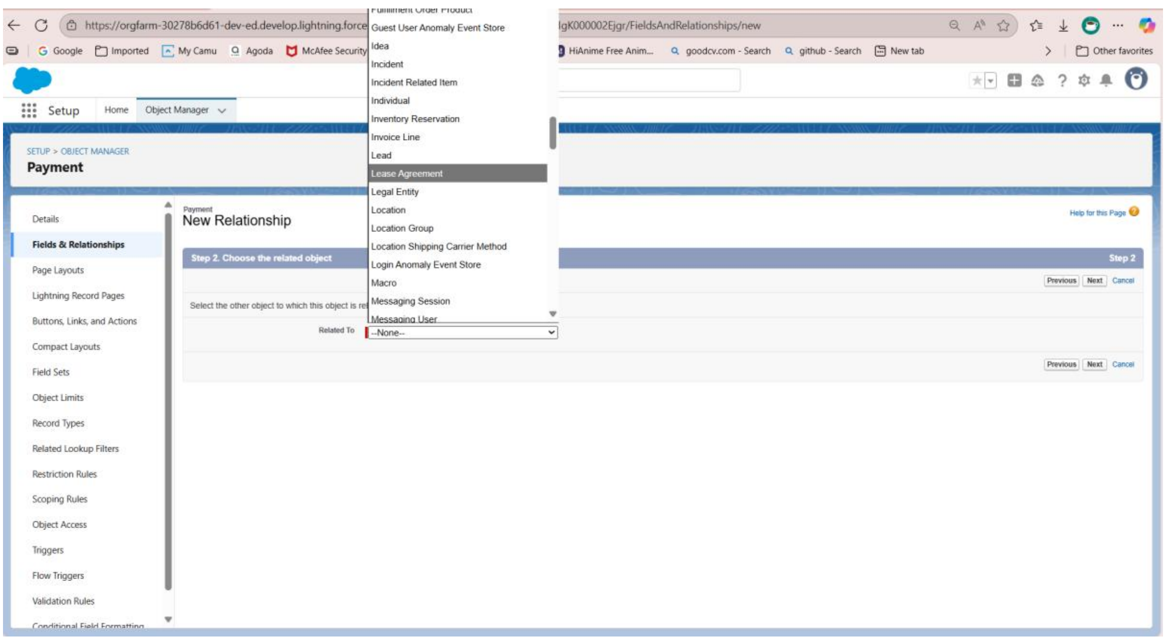

Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Lease Agreement
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Object Access
Triggers
Fields & Relationships
9 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Created By
CreatedById
Lookup(User)
End Date
End_Date__c
Date
Last Modified By
LastModifiedById
Lookup(User)
Lease Agreement Name
Name
Auto Number
Monthly Rent
Monthly_Rent__c
Currency(18, 0)
Owner
OwnerId
Lookup(User,Group)
Property
Property__c
Lookup(Property)
Start Date
Start_Date__c
Date
Tenant
Tenant__c
Lookup(Tenant)

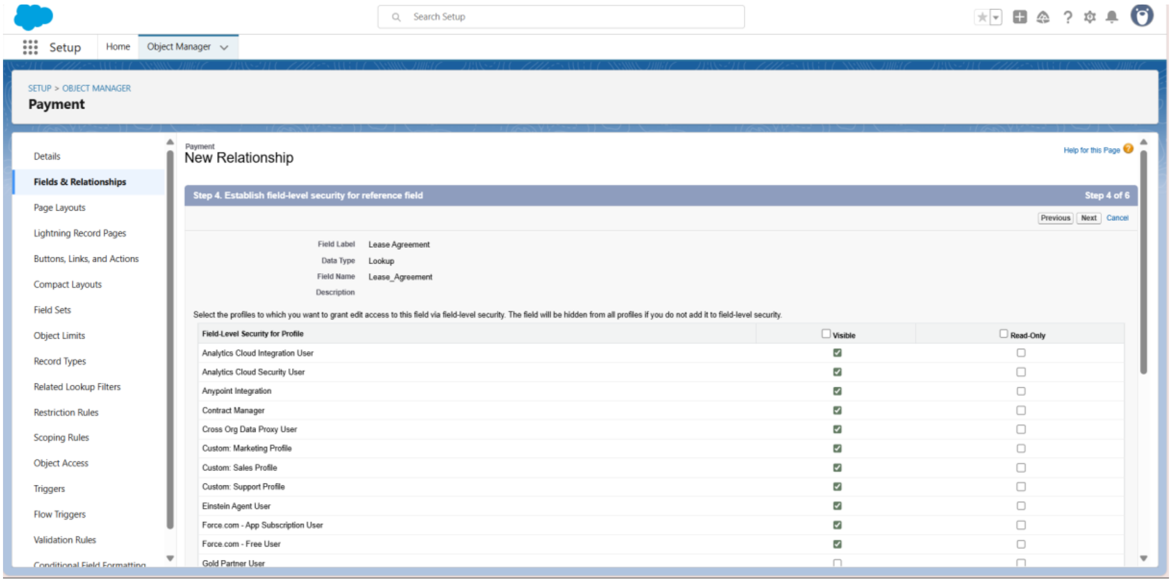

https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new
Search Setup
Setup
Home
Object Manager
SETUP
New Custom Object
New Custom Object
Help for this Page
Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. Tell me more! Don't show this message again
Custom Object Definition Edit
Save
Save & New
Cancel
Custom Object Information
= Required Information
The singular and plural labels are used in tabs, page layouts, and reports.
Label
Payment
Example: Account
Plural Label
Payments
Example: Accounts
Starts with vowel sound
The Object Name is used when referencing the object via the API.
Object Name
Payment_c
Example: Account
Description
Context-Sensitive Help Setting
Open the standard Salesforce.com Help & Training window
Open a window using a Visualforce page
Content Name
--None--
Enter Record Name Label and Format
The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.
Record Name
Payment Name
Example: Account Name
Data Type
Auto Number
Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.

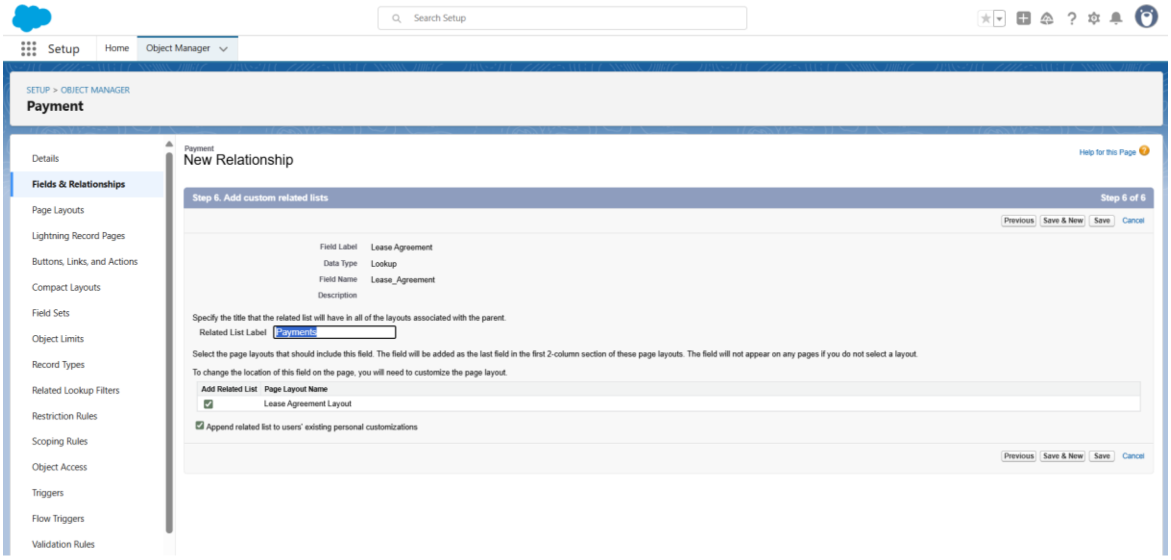

https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3FretURL%3D%252F...
Search Setup
Setup
Home
Object Manager
Quick Find
Setup Home
Salesforce Go
Service Setup Assistant
Commerce Setup Assistant
Field Service Setup Home (Beta)
Hyperforce Assistant
Release Updates
Salesforce Mobile App
Lightning Usage
Optimizer
Sales Cloud Everywhere
ADMINISTRATION
Users
Data
Email
PLATFORM TOOLS
Subscription Management
Apps
Feature Settings
Slack
SETUP
Tabs
New Custom Object Tab
Help for this Page
Step 1. Enter the Details
Step 1 of 3
Choose the custom object for this new custom tab. Fill in other details.
New Custom Object Tab
= Required Information
Select an existing custom object or create a new custom object now.
Object
Payment
Tab Style
Bank
(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.
Splash Page Custom Link
--None--
Enter a short description.
Description
Next
Cancel

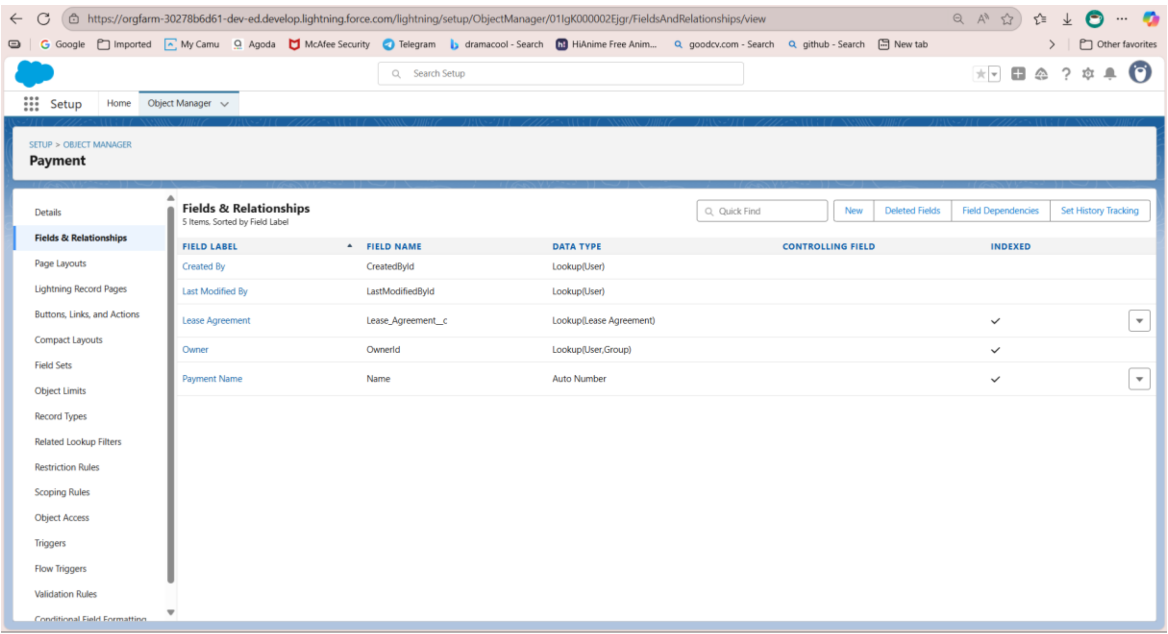

https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgK000002Ejgr/Details/view
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Payment
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Object Access
Triggers
Flow Triggers
Validation Rules
Edit
Delete
Description
API Name
Payment__c
Custom
Singular Label
Payment
Plural Label
Payments
Enable Reports
Track Activities
Track Field History
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window

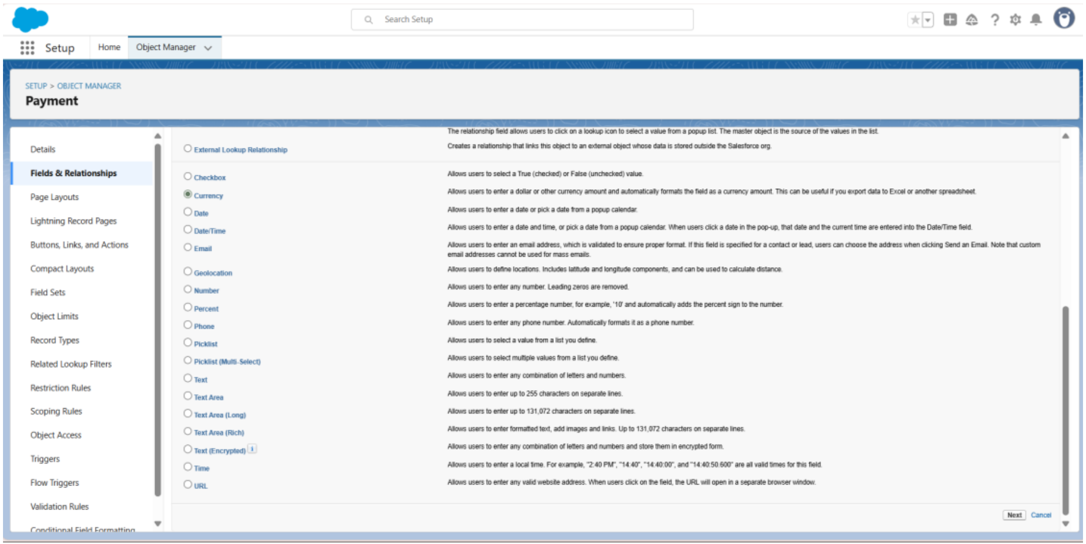

SETUP > OBJECT MANAGER
Payment
Fields & Relationships
4 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Created By
CreatedById
Lookup(User)
Last Modified By
LastModifiedById
Lookup(User)
Owner
OwnerId
Lookup(User,Group)
Payment Name
Name
Auto Number

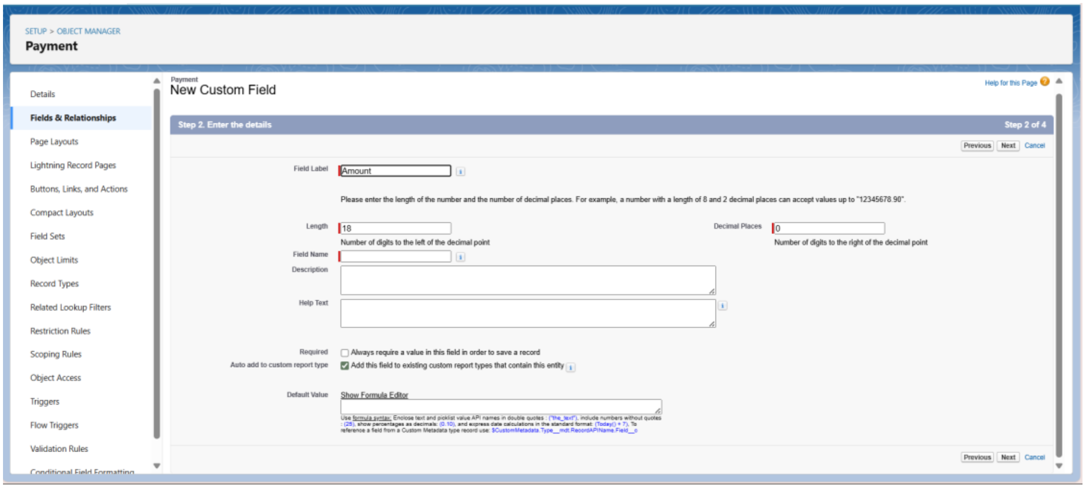

Guest User Anomaly Event Store
Idea
Incident
Incident Related Item
Individual
Inventory Reservation
Invoice Line
Lead
Lease Agreement
Legal Entity
Location
Location Group
Location Shipping Carrier Method
Login Anomaly Event Store
Macro
Messaging Session
Payment
New Relationship
Step 2. Choose the related object
Step 2
Previous
Next
Cancel
Related To
--None--
Help for this Page

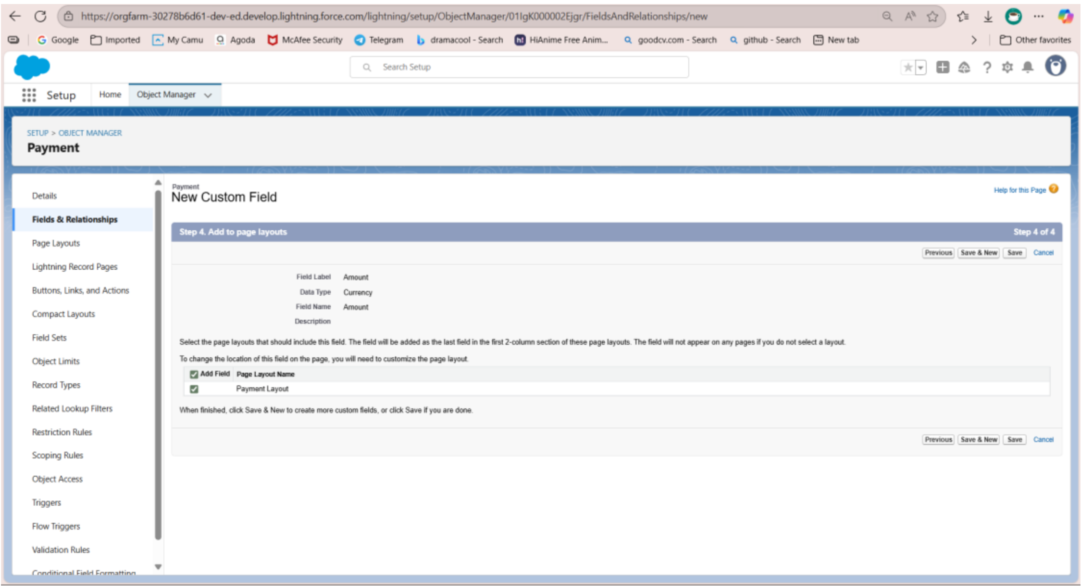

Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Payment
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Object Access
Triggers
Flow Triggers
Validation Rules
Payment
New Relationship
Help for this Page
Step 4. Establish field-level security for reference field
Step 4 of 6
Previous
Next
Cancel
Field Label Lease Agreement
Data Type Lookup
Field Name Lease_Agreement
Description
Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.
Field-Level Security for Profile
Visible
Read-Only
Analytics Cloud Integration User
Analytics Cloud Security User
Anypoint Integration
Contract Manager
Cross Org Data Proxy User
Custom: Marketing Profile
Custom: Sales Profile
Custom: Support Profile
Einstein Agent User
Force.com - App Subscription User
Force.com - Free User
Gold Partner User

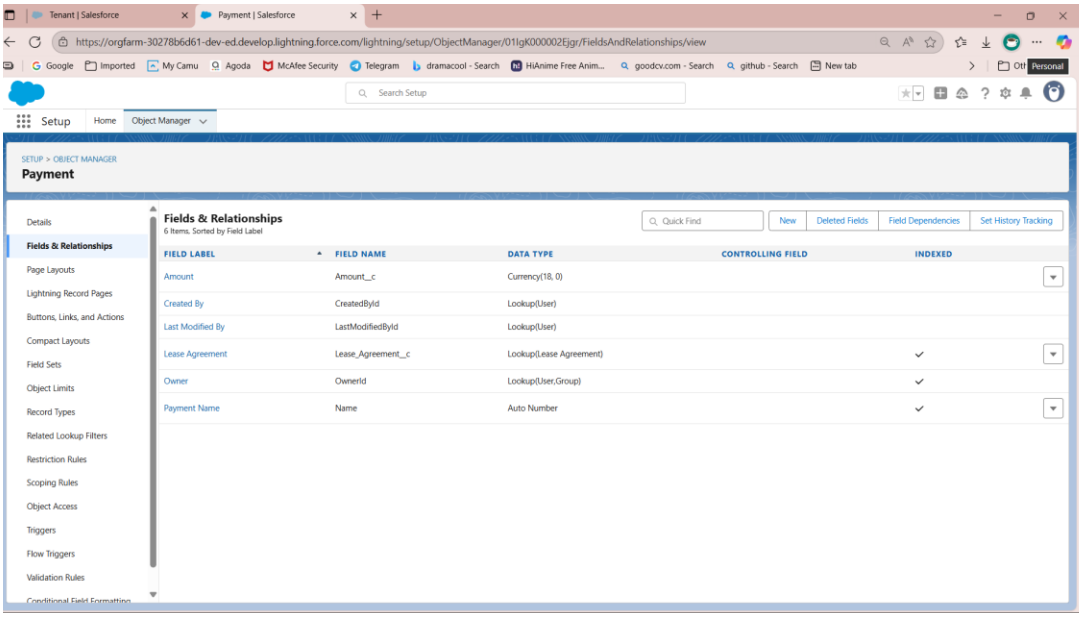

Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Payment
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Object Access
Triggers
Flow Triggers
Validation Rules
Payment
New Relationship
Help for this Page
Step 6. Add custom related lists
Step 6 of 6
Previous
Save & New
Save
Cancel
Field Label Lease Agreement
Data Type Lookup
Field Name Lease_Agreement
Description
Specify the title that the related list will have in all of the layouts associated with the parent.
Related List Label Payments
Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.
To change the location of this field on the page, you will need to customize the page layout.
Add Related List
Page Layout Name
Lease Agreement Layout
Append related list to users' existing personal customizations
Previous
Save & New
Save
Cancel


https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgK000002Ejgr/FieldsAndRelationships/view
Google
Imported
My Camu
Agoda
McAfee Security
Telegram
dramacool - Search
HiAnime Free Anim...
goodcv.com - Search
github - Search
New tab
Other favorites
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Payment
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Object Access
Triggers
Flow Triggers
Validation Rules
Fields & Relationships
5 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Created By
CreatedById
Lookup(User)
Last Modified By
LastModifiedById
Lookup(User)
Lease Agreement
Lease_Agreement__c
Lookup(Lease Agreement)
Owner
OwnerId
Lookup(User,Group)
Payment Name
Name
Auto Number

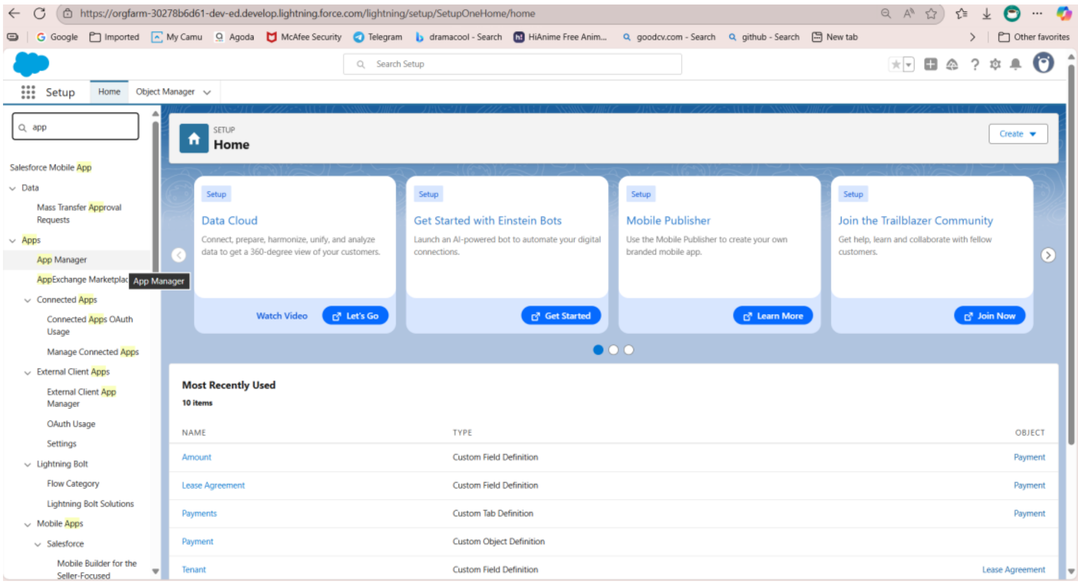

Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Payment
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Object Access
Triggers
Flow Triggers
Validation Rules
External Lookup Relationship
Checkbox
Currency
Date
Date/Time
Email
Geolocation
Number
Percent
Phone
Picklist
Picklist (Multi-Select)
Text
Text Area
Text Area (Long)
Text Area (Rich)
Text (Encrypted)
Time
URL
Allows users to select a True (checked) or False (unchecked) value.
Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
Allows users to enter a date or pick a date from a popup calendar.
Allows users to enter any number. Leading zeros are removed.
Allows users to select a value from a list you define.
Allows users to select multiple values from a list you define.
Allows users to enter any combination of letters and numbers.
Next
Cancel

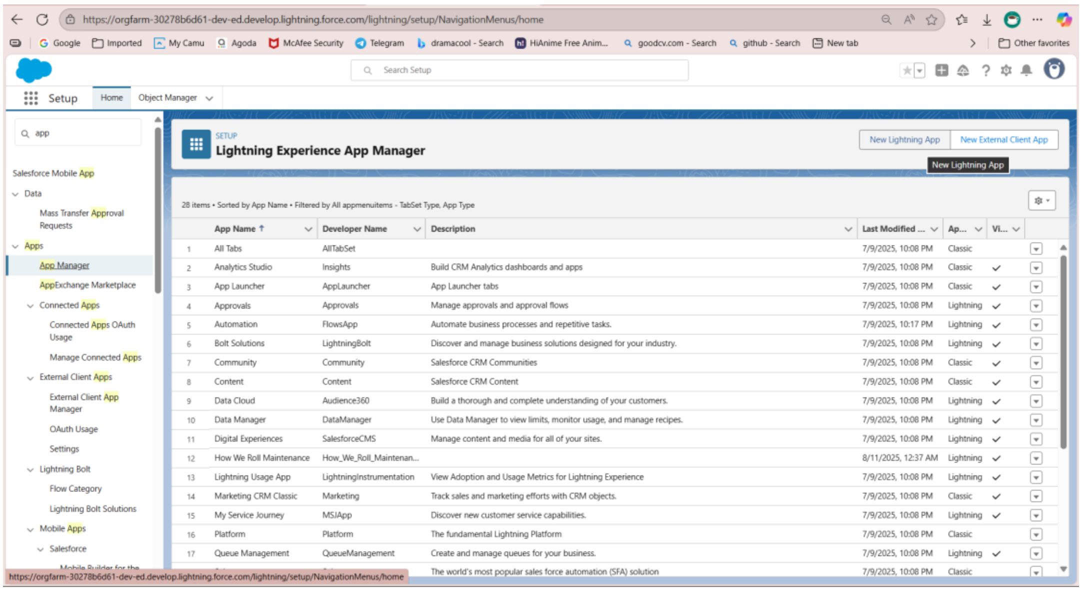

SETUP > OBJECT MANAGER
Payment
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Object Access
Triggers
Flow Triggers
Validation Rules
Payment
New Custom Field
Help for this Page
Step 2. Enter the details
Step 2 of 4
Previous
Next
Cancel
Field Label
Amount
Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".
Length
18
Number of digits to the left of the decimal point
Decimal Places
0
Number of digits to the right of the decimal point
Field Name
Description
Help Text
Required
Always require a value in this field in order to save a record
Auto add to custom report type
Add this field to existing custom report types that contain this entity
Default Value
Show Formula Editor

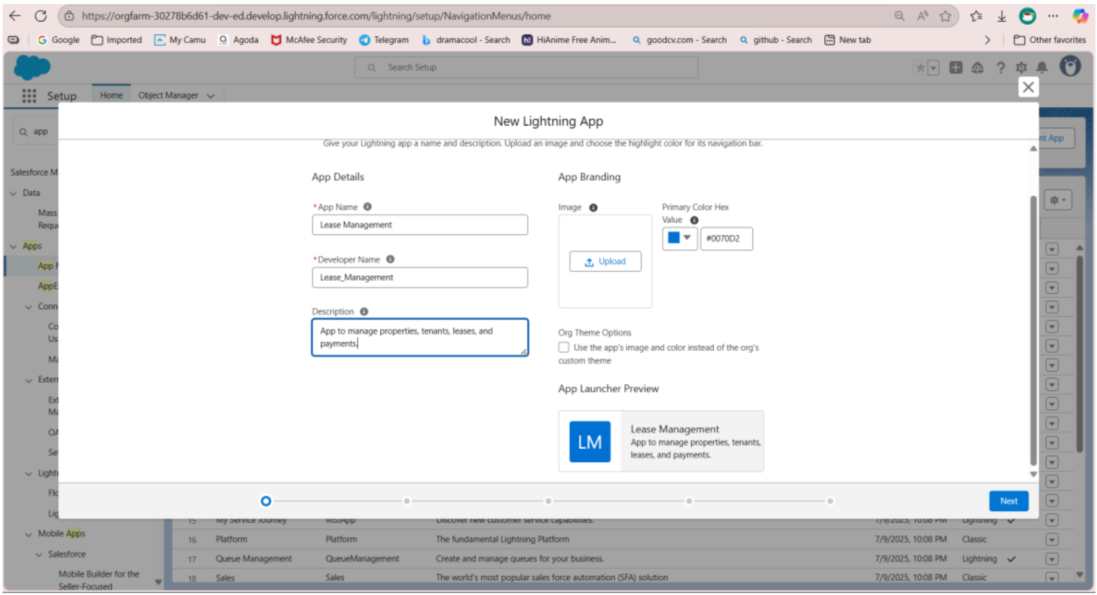

https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgK000002Ejgr/FieldsAndRelationships/new
Google
Imported
My Camu
Agoda
McAfee Security
Telegram
dramacool - Search
HiAnime Free Anim...
goodcv.com - Search
github - Search
New tab
Other favorites
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Payment
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Object Access
Triggers
Flow Triggers
Validation Rules
Payment
New Custom Field
Help for this Page
Step 4. Add to page layouts
Step 4 of 4
Previous
Save & New
Save
Cancel
Field Label
Amount
Data Type
Currency
Field Name
Amount
Description
Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.
To change the location of this field on the page, you will need to customize the page layout.
Add Field
Page Layout Name
Payment Layout
When finished, click Save & New to create more custom fields, or click Save if you are done.

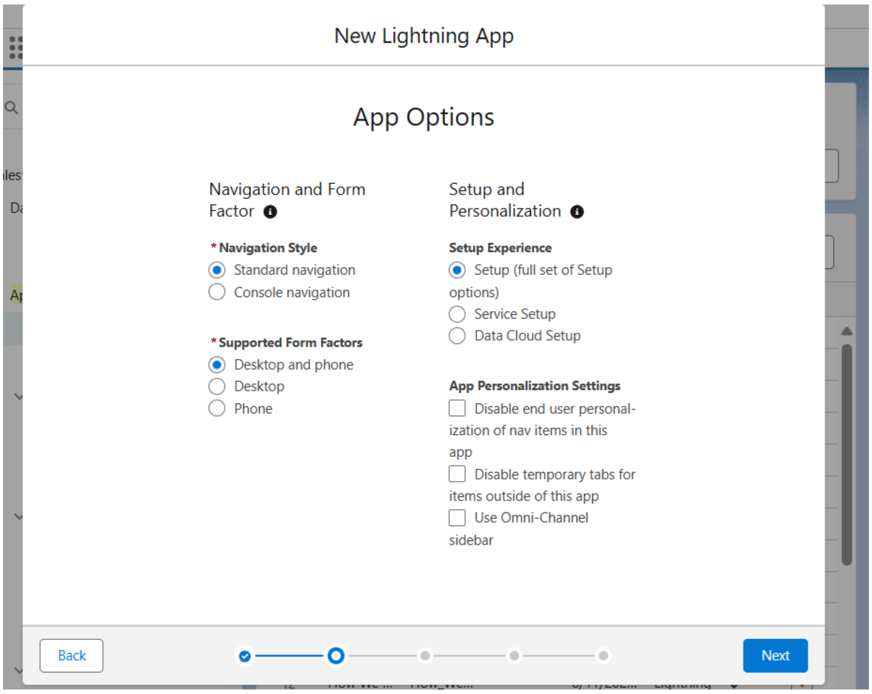


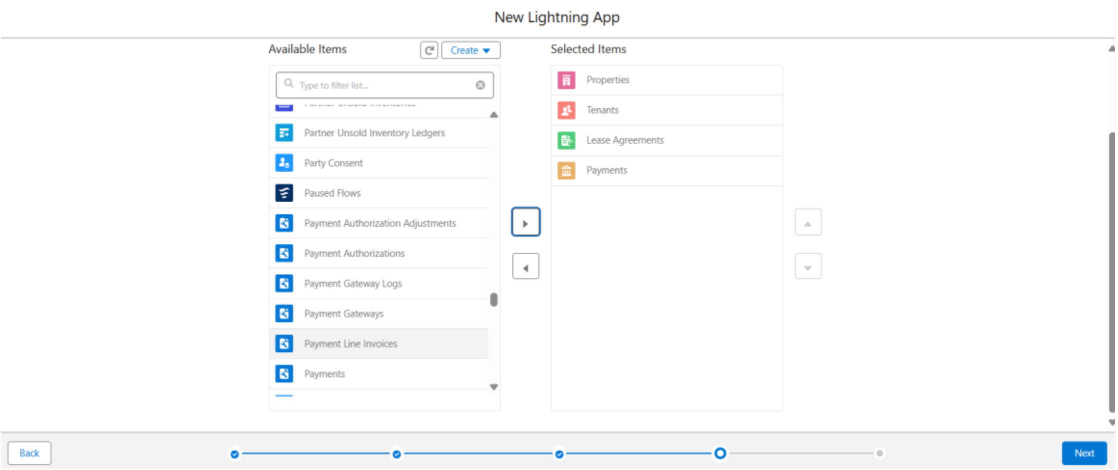
group them together into one custom app

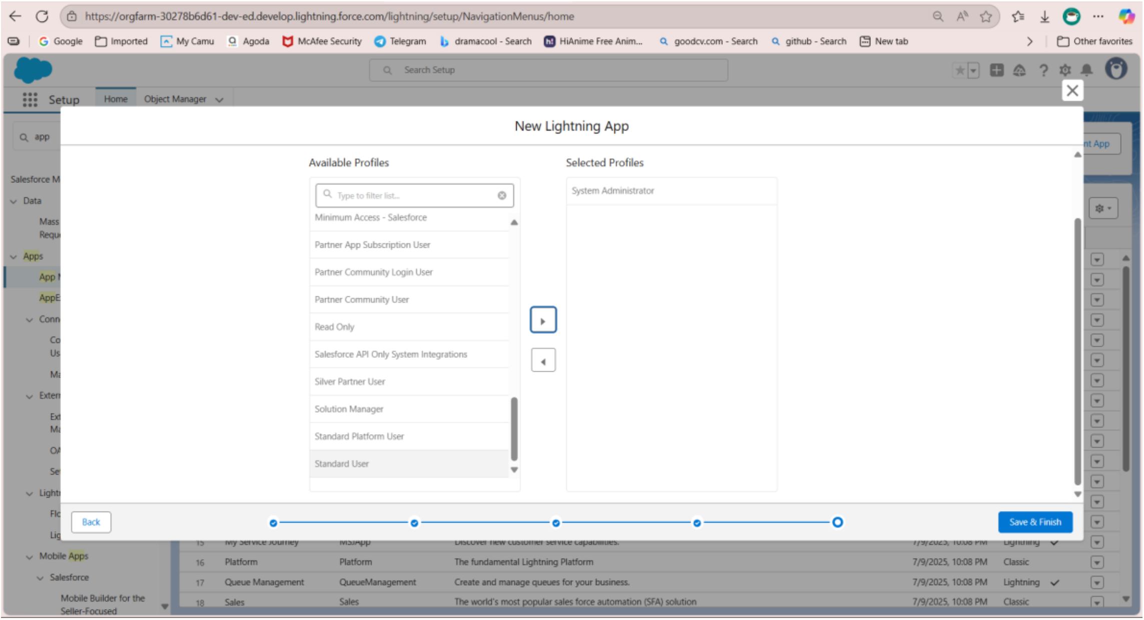


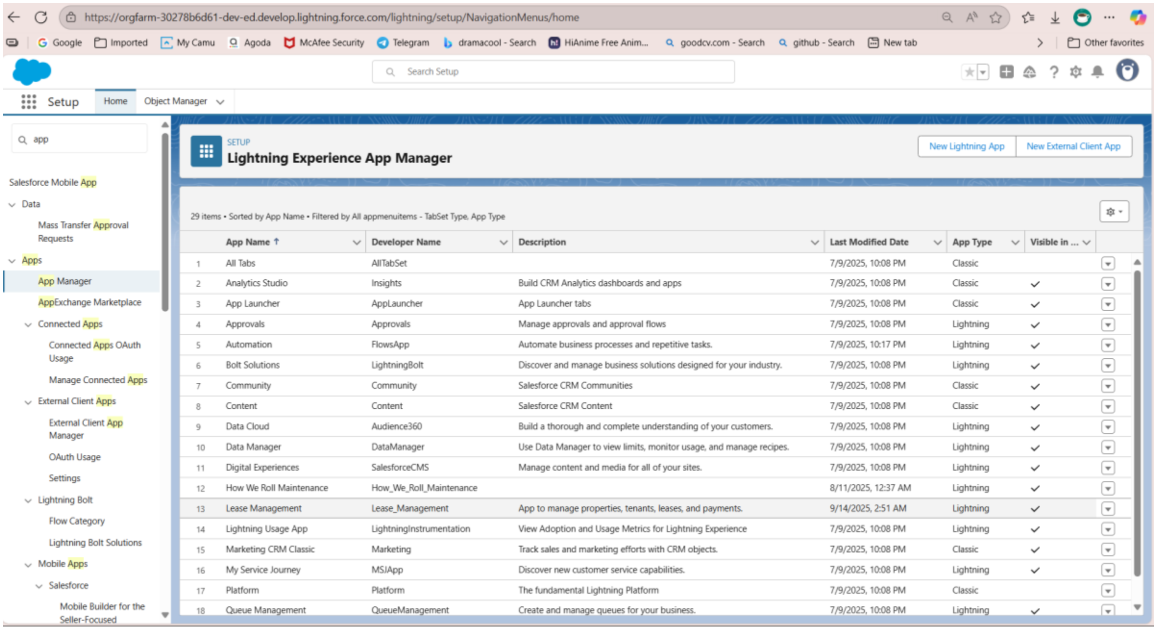



New Lightning App
Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.
App Details
App Branding
App Name
Lease Management
Developer Name
Lease_Management
Description
App to manage properties, tenants, leases, and payments
Image
Upload
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
LM
Lease Management
App to manage properties, tenants, leases, and payments.
Next

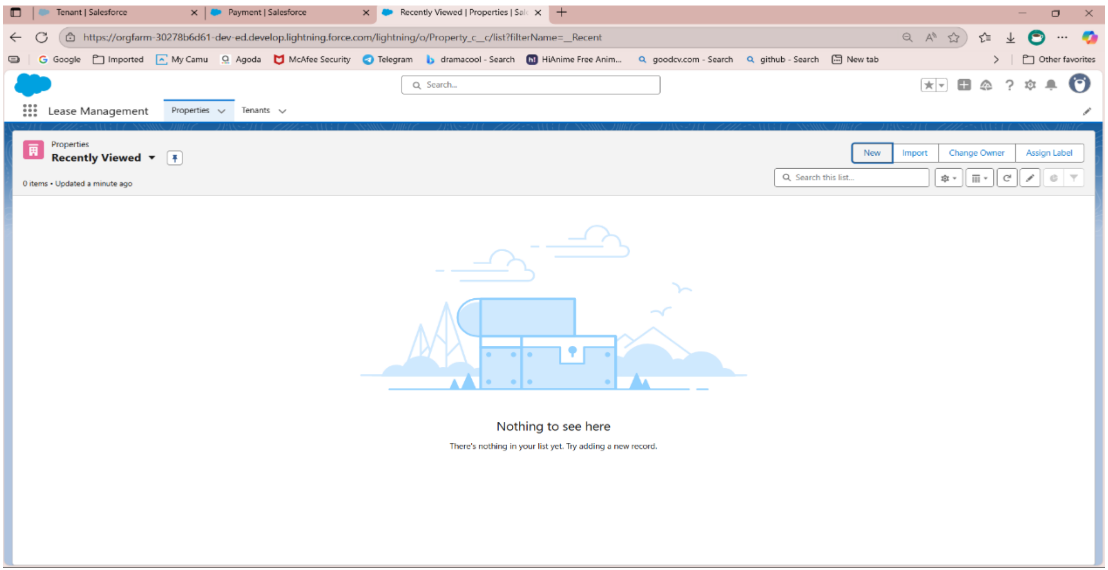

New Lightning App
App Options
Navigation and Form Factor
Setup and Personalization
Navigation Style
Standard navigation
Console navigation
Supported Form Factors
Desktop and phone
Desktop
Phone
Setup Experience
Setup (full set of Setup options)
Service Setup
Data Cloud Setup
App Personalization Settings
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

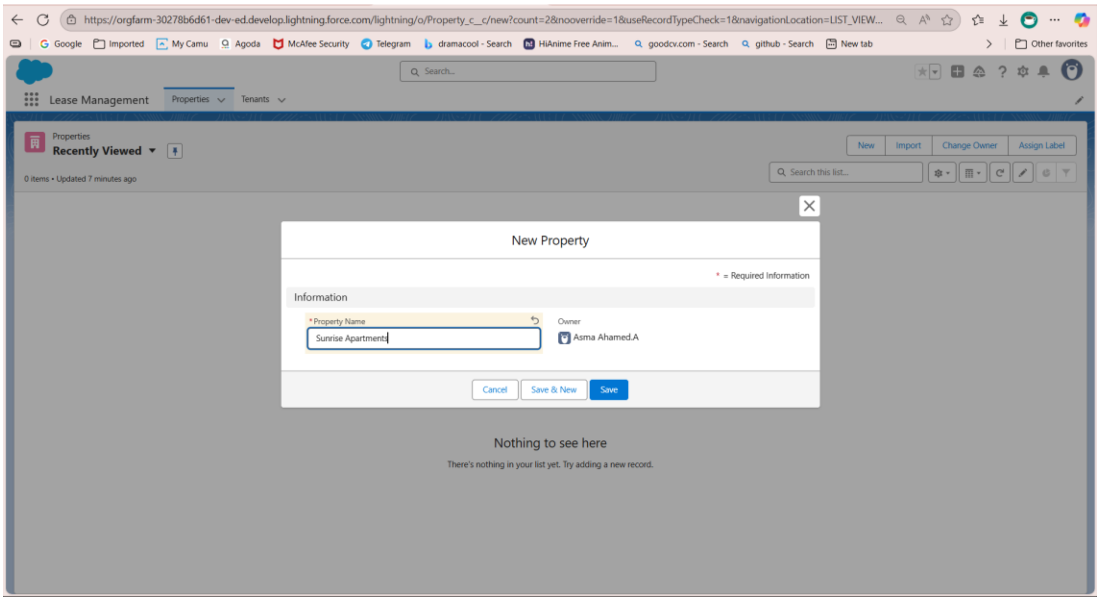

New Lightning App
Available Items
Create
Selected Items
Partner Unsold Inventory Ledgers
Party Consent
Paused Flows
Payment Authorization Adjustments
Payment Authorizations
Payment Gateway Logs
Payment Gateways
Payment Line Invoices
Payments
Properties
Tenants
Lease Agreements
Payments
Back
Next



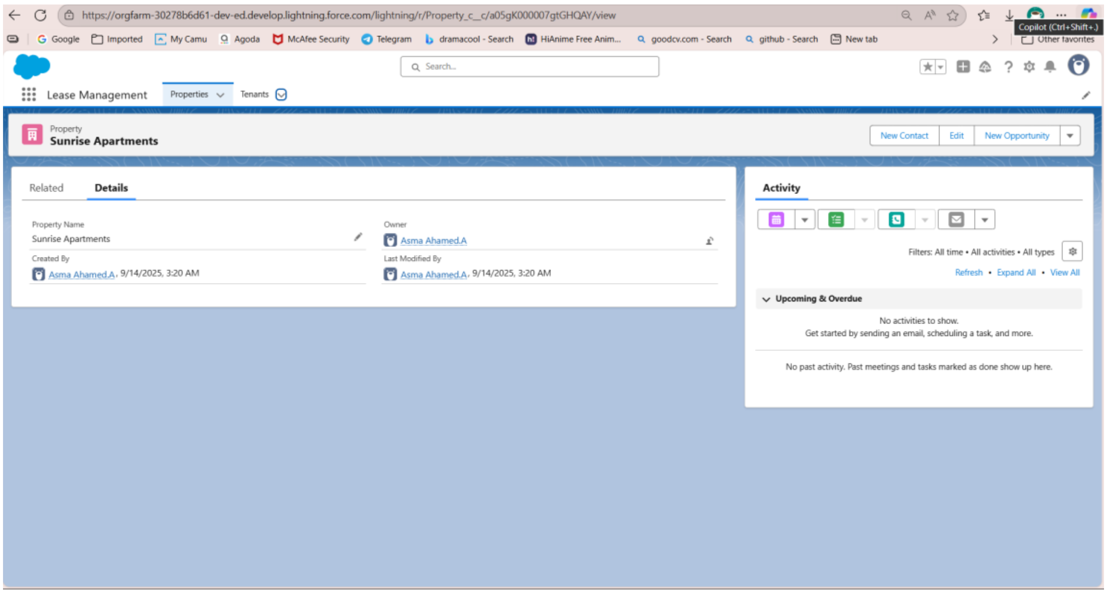


ready to add data.

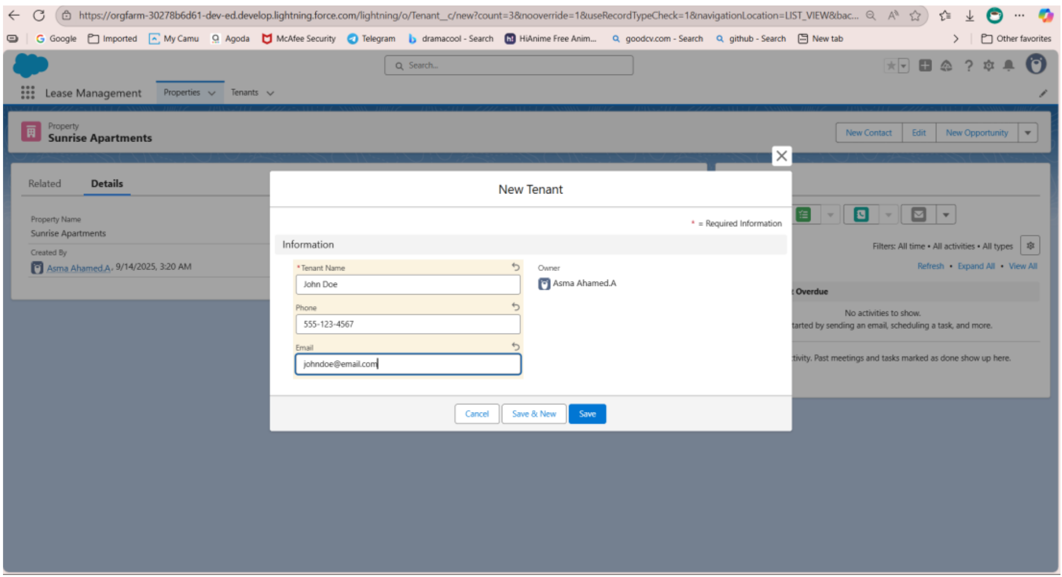




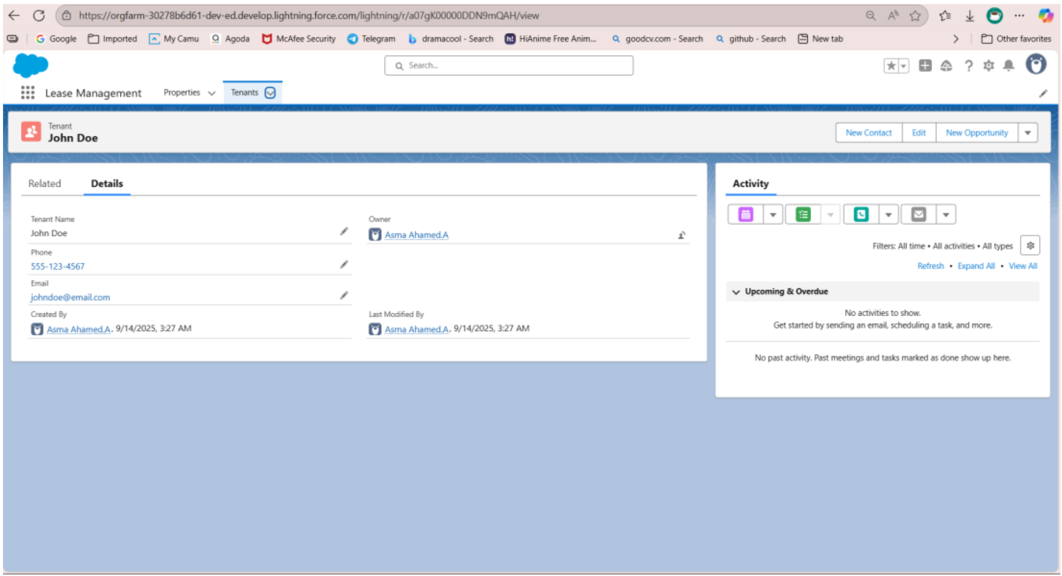
Lease Management
Properties
Tenants
Recently Viewed
0 items • Updated 7 minutes ago
New
Import
Change Owner
Assign Label
New Property
* = Required Information
Information
* Property Name
Sunrise Apartments
Owner
Asma Ahamed.A
Cancel
Save & New
Save
Nothing to see here
There's nothing in your list yet. Try adding a new record.

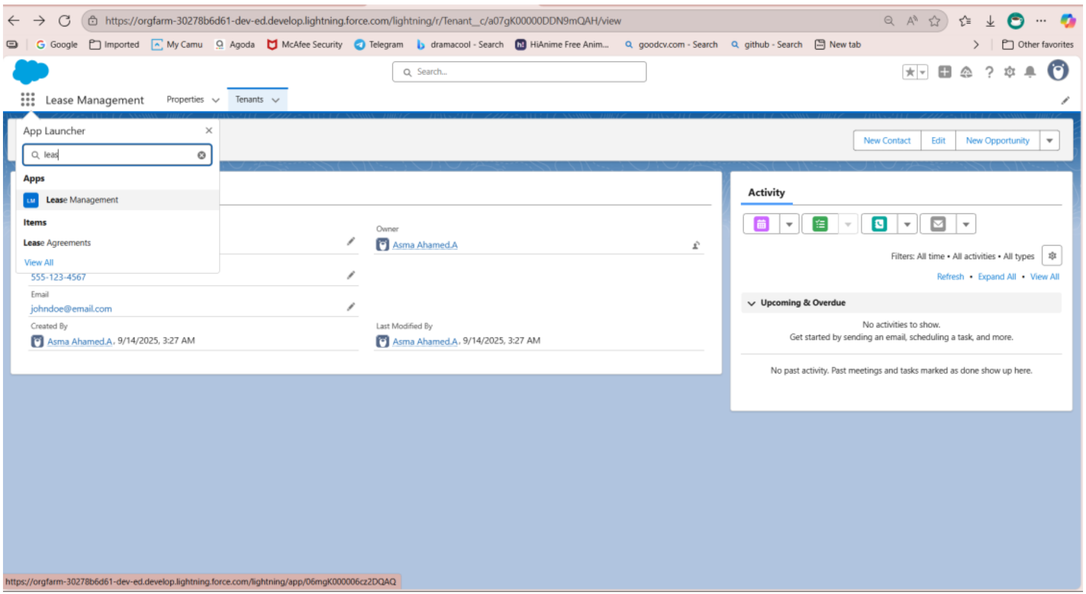


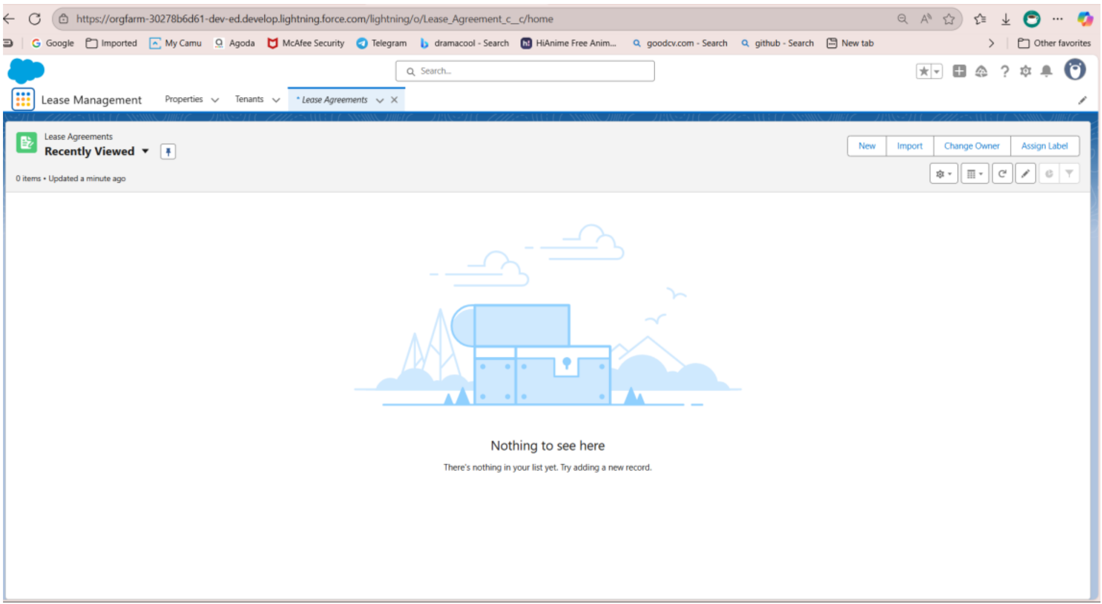
Lease Management
Properties
Tenants
Property
Sunrise Apartments
New Contact
Edit
New Opportunity
Related
Details
Property Name
Sunrise Apartments
Owner
Asma Ahamed.A
Created By
Asma Ahamed.A, 9/14/2025, 3:20 AM
Last Modified By
Asma Ahamed.A, 9/14/2025, 3:20 AM
Activity
Filters: All time • All activities • 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.

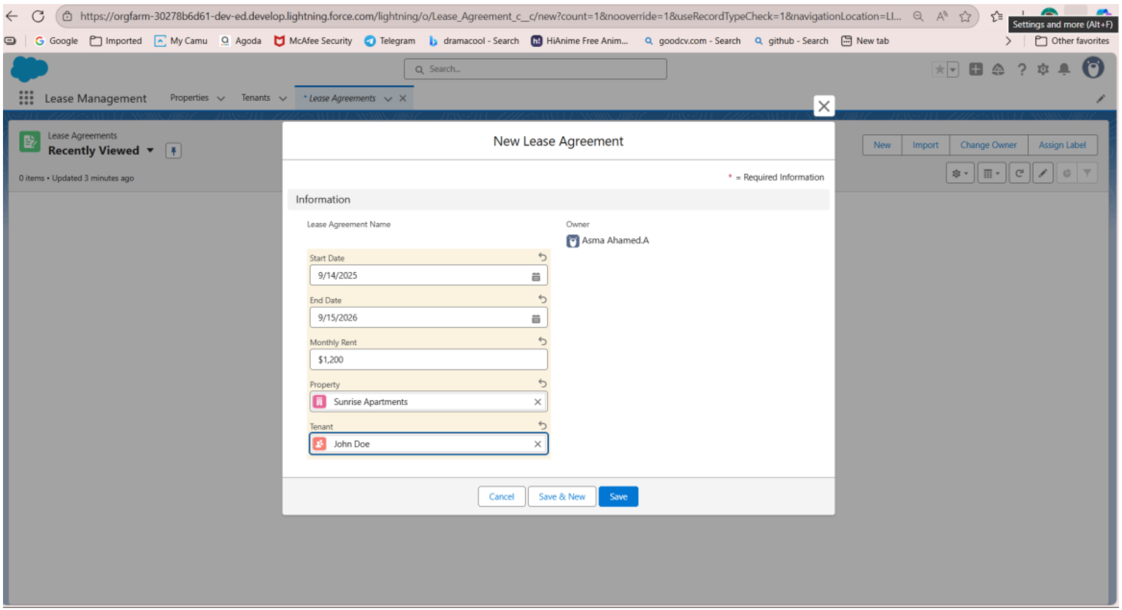


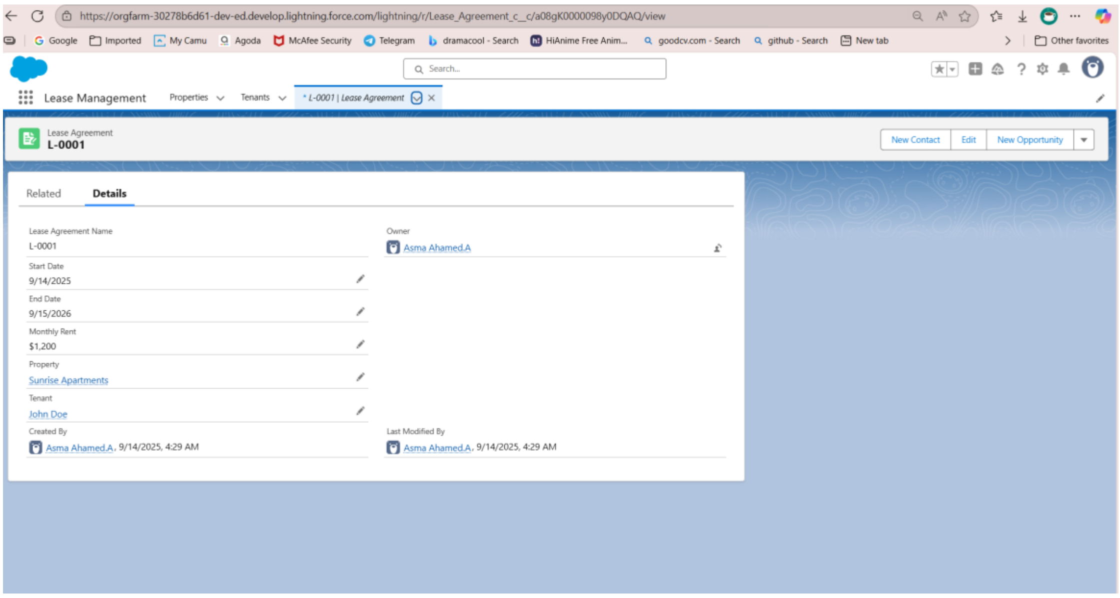
Lease Management
Properties
Tenants
Property
Sunrise Apartments
New Tenant
* = Required Information
Information
* Tenant Name
John Doe
Owner
Asma Ahamed.A
Phone
555-123-4567
Email
johndoe@email.com
Cancel
Save & New
Save

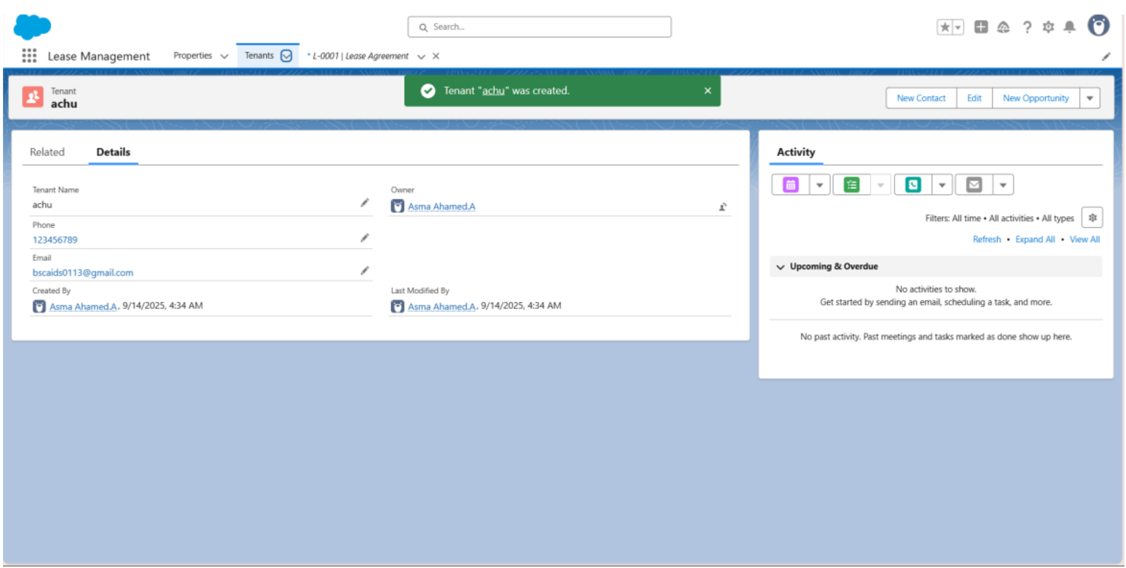

https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/r/a07gK00000DDN9mQAH/view
Lease Management
Properties
Tenants
Tenant
John Doe
New Contact
Edit
New Opportunity
Related
Details
Tenant Name
John Doe
Owner
Asma Ahamed.A
Phone
555-123-4567
Email
johndoe@email.com
Created By
Asma Ahamed.A, 9/14/2025, 3:27 AM
Last Modified By
Asma Ahamed.A, 9/14/2025, 3:27 AM
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.


https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/r/Tenant__c/a07gK00000DDN9mQAH/view
Lease Management
Properties
Tenants
App Launcher
leas
Apps
Lease Management
Items
Lease Agreements
View All
New Contact
Edit
New Opportunity
Owner
Asma Ahamed.A
555-123-4567
Email
johndoe@email.com
Created By
Asma Ahamed.A, 9/14/2025, 3:27 AM
Last Modified By
Asma Ahamed.A, 9/14/2025, 3:27 AM
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.
https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/app/06mgK000006cz2DQAQ


https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/o/Lease_Agreement__c/home
Lease Management
Properties
Tenants
* Lease Agreements
Lease Agreements
Recently Viewed
New
Import
Change Owner
Assign Label
0 items • Updated a minute ago
Nothing to see here
There's nothing in your list yet. Try adding a new record.

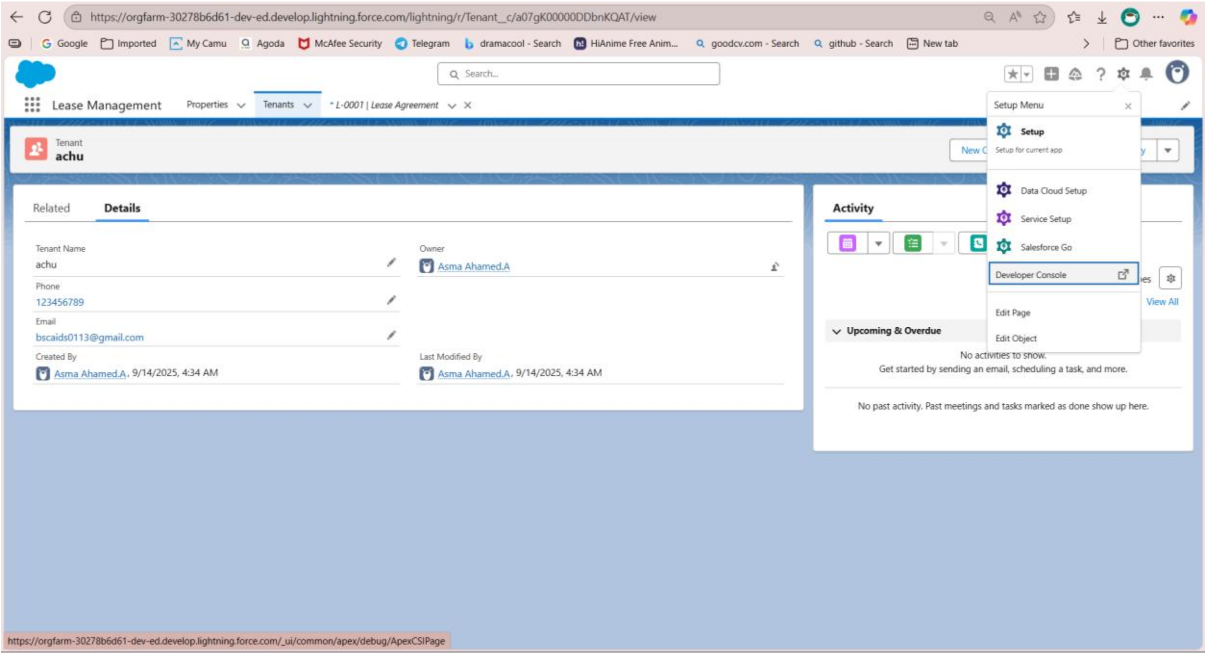


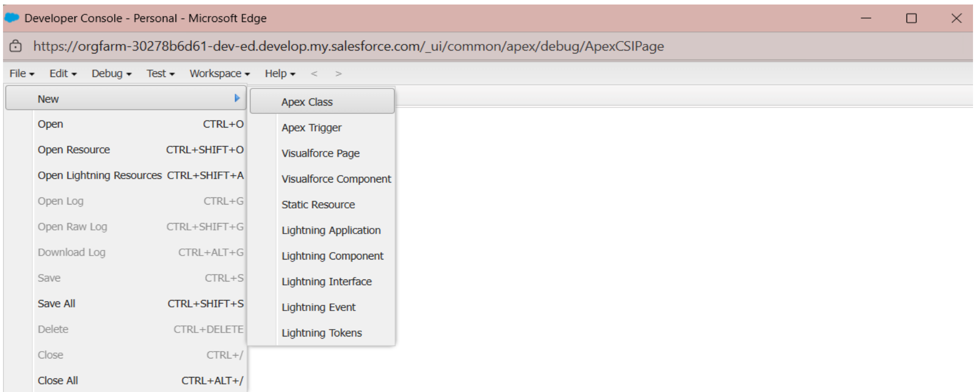


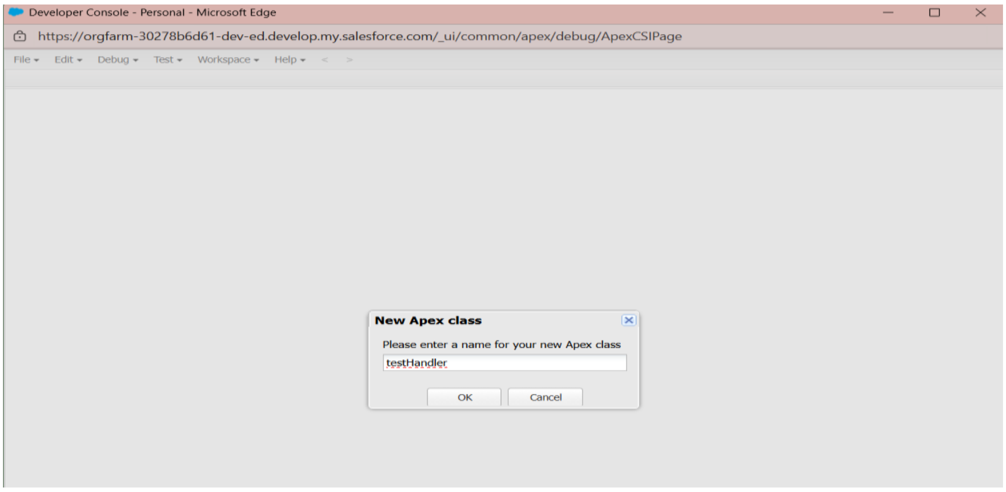


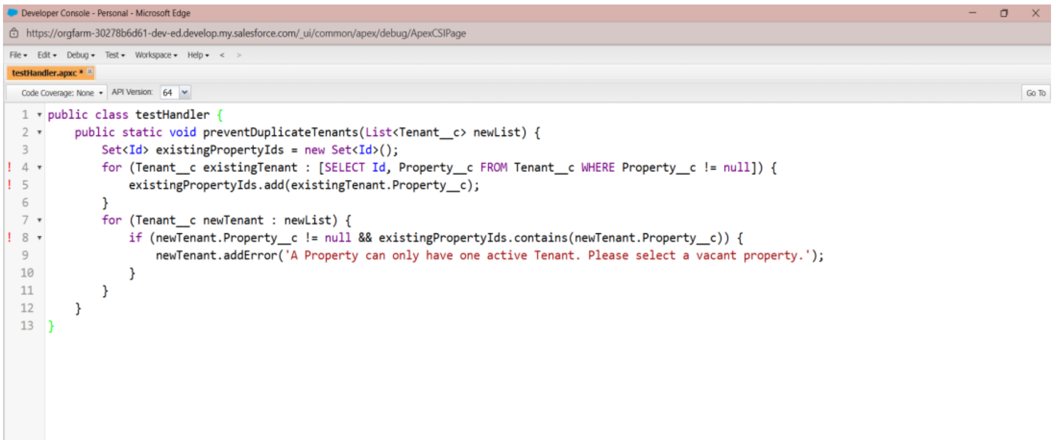
"achu" was created, which means the trigger **did not run**. This happens because the code might be missing or has a small mistake

Create the Class (The Brain):





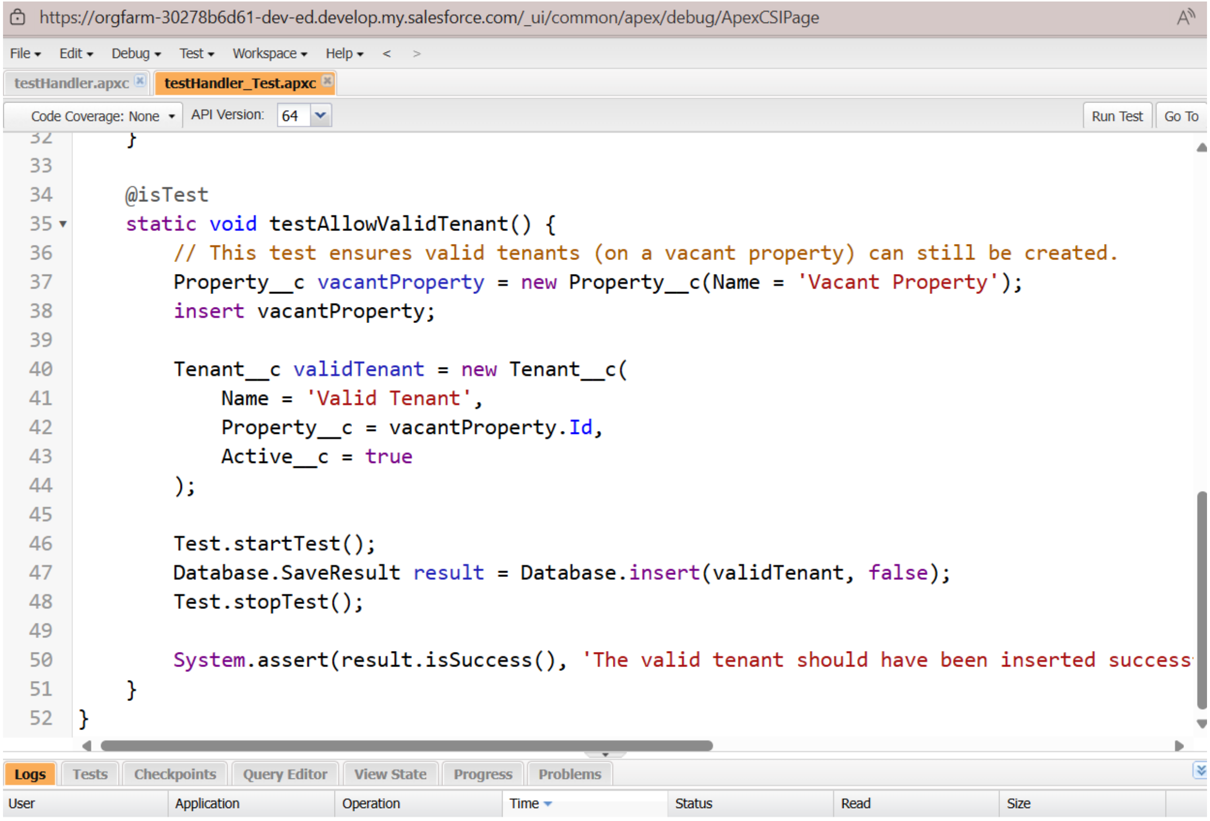





```
public class testHandler {
    public static void preventDuplicateTenants(List<Tenant__c> newList) {
        // Get all Property IDs that currently have an ACTIVE Tenant
        Set<Id> occupiedPropertyIds = new Set<Id>();
        for (Tenant__c activeTenant : [SELECT Id, Property__c
                                       FROM Tenant__c
                                       WHERE Property__c != null
                                       AND Active__c = true]) {
            occupiedPropertyIds.add(activeTenant.Property__c);
        }

        // Check new tenants against the list of occupied properties
        for (Tenant__c newTenant : newList) {
            if (newTenant.Property__c != null && newTenant.Active__c && 
occupiedPropertyIds.contains(newTenant.Property__c)) {
                newTenant.addError('A Property can only have one active Tenant. Please select a 
vacant property.');
            }
        }
    }
}
```

Save the code ctrl+S or file->save

If any error found means clear it and save it again




```
@isTest
public class testHandler_Test {

   @isTest
   static void testPreventDuplicateTenants() {
      // SETUP: Create a test property and an active tenant
      Property__c testProperty = new Property__c(Name = 'Test Property');
      insert testProperty;

      Tenant__c existingTenant = new Tenant__c(
         Name = 'Existing Tenant',
         Property__c = testProperty.Id,
         Active__c = true
      );
      insert existingTenant;

      // TEST: Try to add a second active tenant to the same property
```

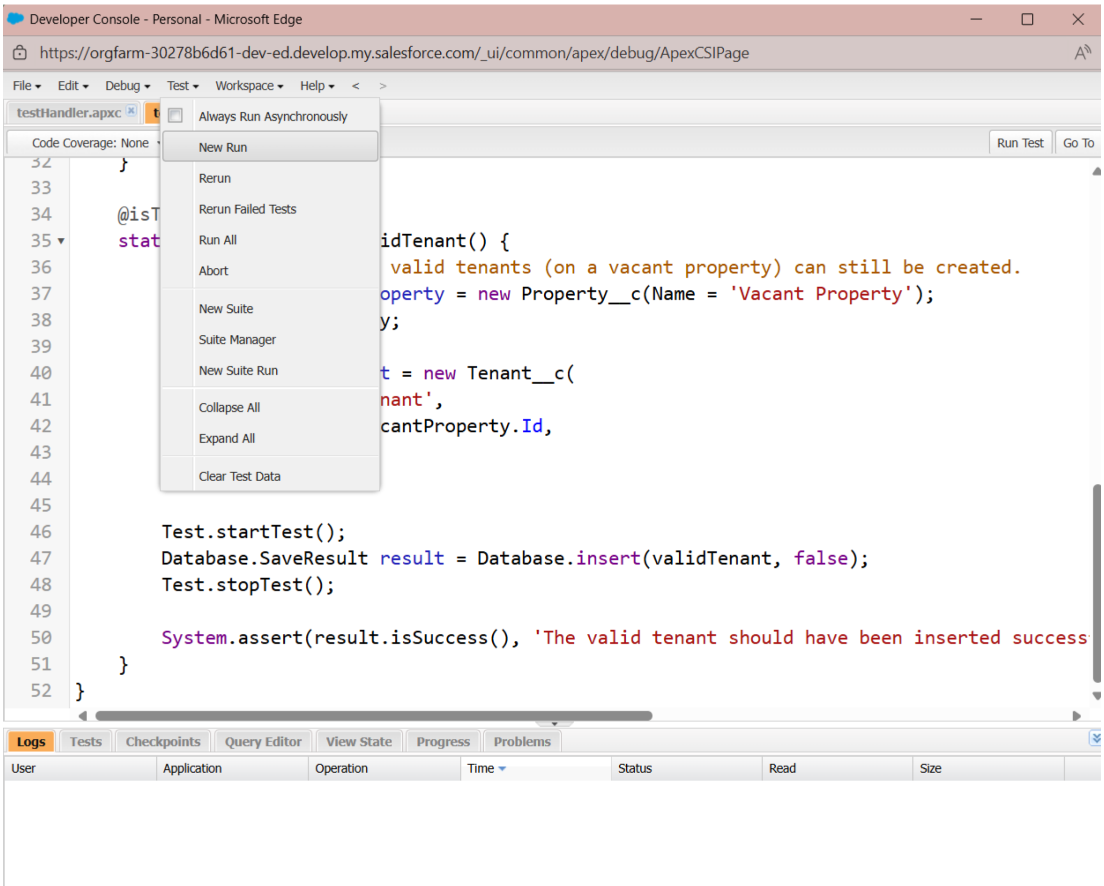
```
        Tenant__c duplicateTenant = new Tenant__c(
            Name = 'Duplicate Tenant',
            Property__c = testProperty.Id,
            Active__c = true
        );

        Test.startTest();
        try {
            insert duplicateTenant;
            System.assert(false, 'Expected an error but none was thrown.');
        } catch (DmlException e) {
            System.assert(e.getMessage().contains('A Property can only have one active Tenant'),
'Error message did not match: ' + e.getMessage());
        }
        Test.stopTest();
    }

    @isTest
    static void testAllowValidTenant() {
        // This test ensures valid tenants (on a vacant property) can still be created.
        Property__c vacantProperty = new Property__c(Name = 'Vacant Property');
        insert vacantProperty;

        Tenant__c validTenant = new Tenant__c(
            Name = 'Valid Tenant',
            Property__c = vacantProperty.Id,
            Active__c = true
        );

        Test.startTest();
        Database.SaveResult result = Database.insert(validTenant, false);
        Test.stopTest();
```

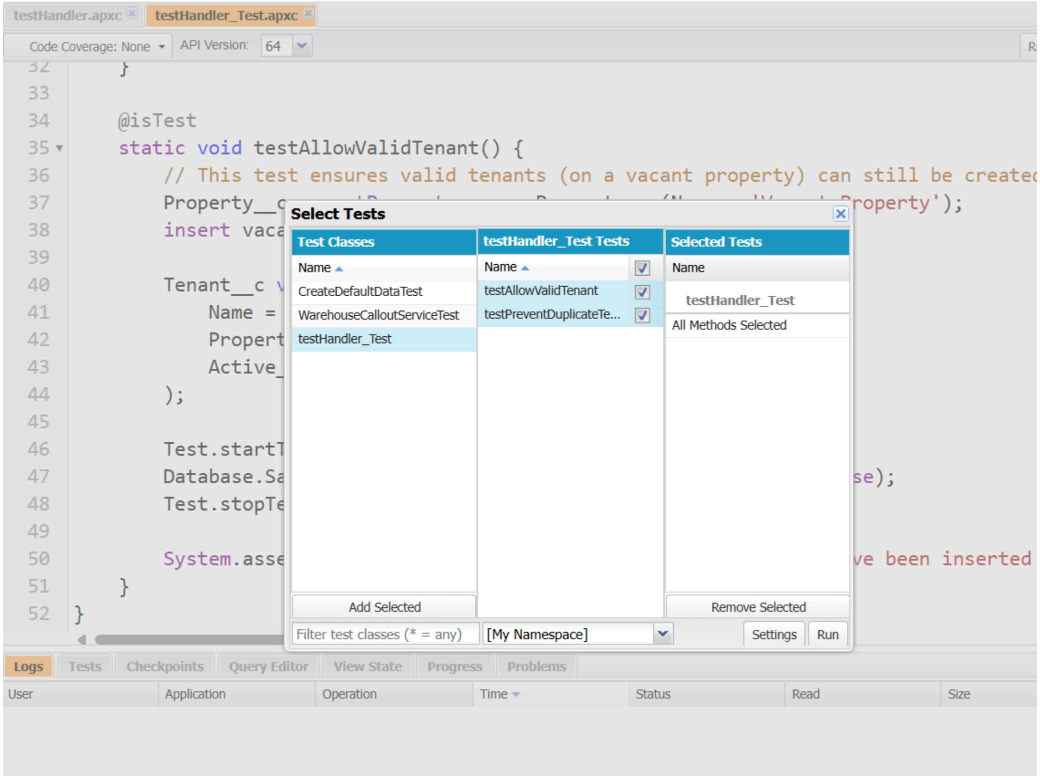
System.assert(result.isSuccess(), 'The valid tenant should have been inserted successfully but was not. Error: ' + result.getErrors()[0].getMessage());

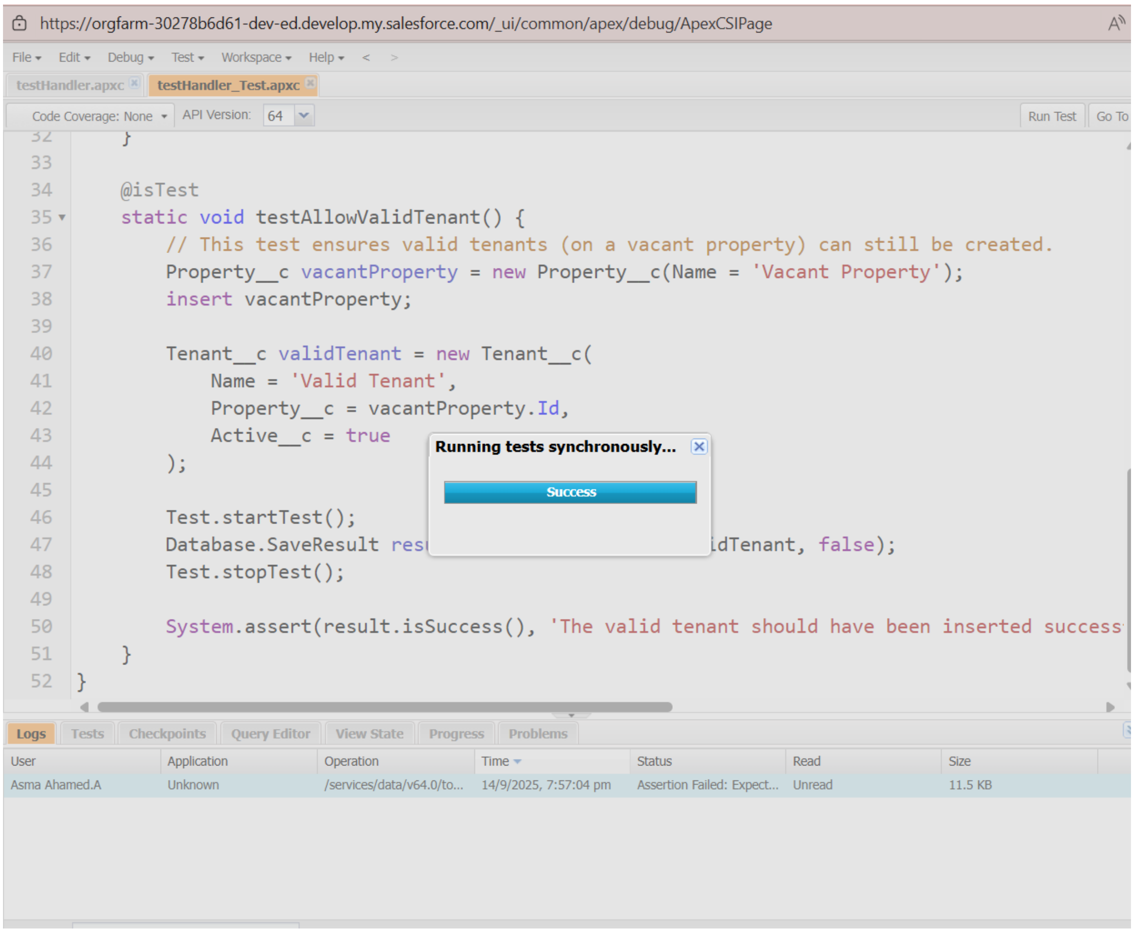
}

}

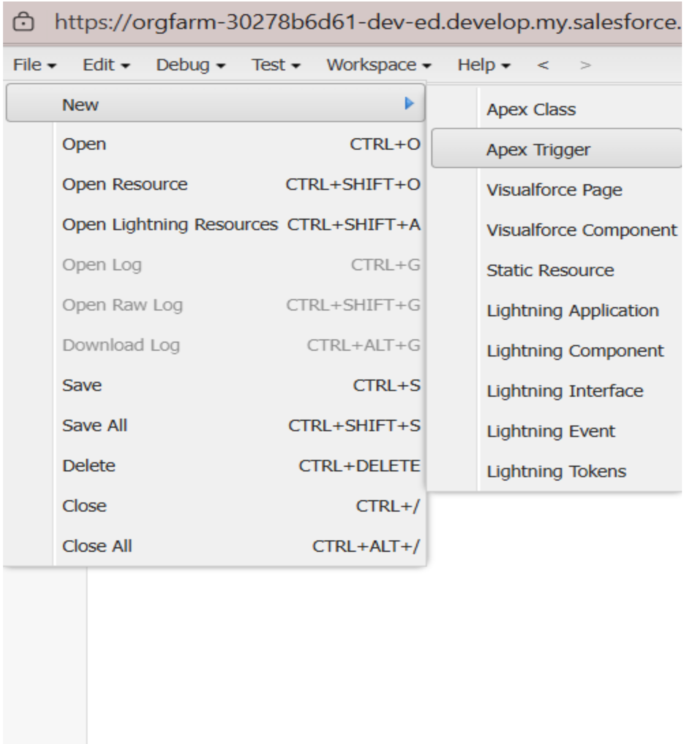
1. Name it testHandler_Test
2. **Copy and paste** the entire code above
3. **Save** the file
4. **Run the tests** (Tests tab → New Run → select testHandler_Test → Run)



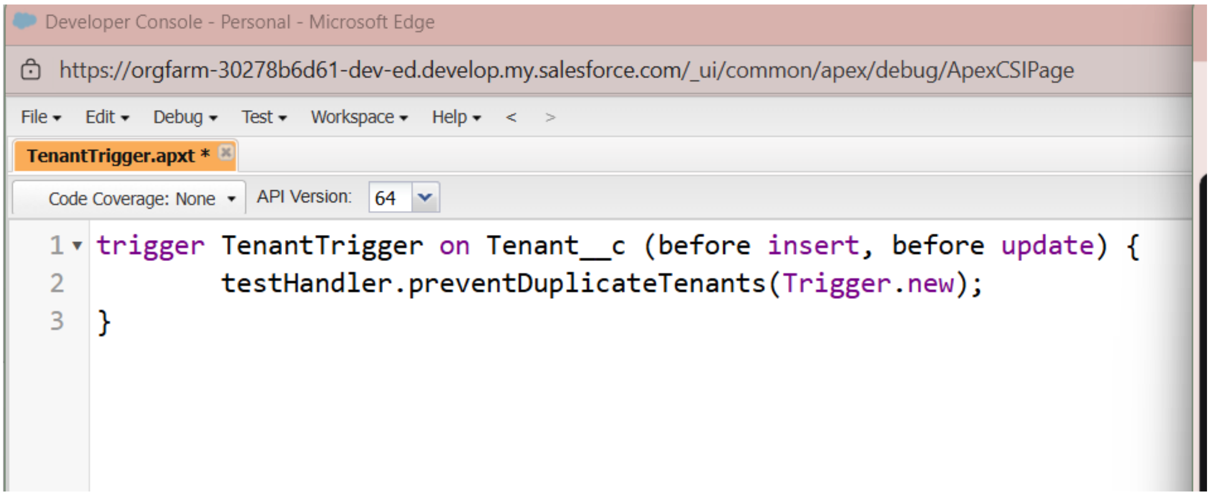

testHandler.apxc
testHandler_Test.apxc
Code Coverage: None
API Version: 64
@isTest
static void testAllowValidTenant() {
// This test ensures valid tenants (on a vacant property) can still be created
Select Tests
Test Classes
Name
CreateDefaultDataTest
WarehouseCalloutServiceTest
testHandler_Test
testHandler_Test Tests
testAllowValidTenant
testPreventDuplicateTe...
Selected Tests
testHandler_Test
All Methods Selected
Add Selected
Remove Selected
Filter test classes (* = any)
[My Namespace]
Settings
Run
Logs
Tests
Checkpoints
Query Editor
View State
Progress
Problems
User
Application
Operation
Time
Status
Read
Size


https://orgfarm-30278b6d61-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage
File
Edit
Debug
Test
Workspace
Help
testHandler.apxc
testHandler_Test.apxc
Code Coverage: None
API Version: 64
Run Test
Go To
@isTest
static void testAllowValidTenant() {
// This test ensures valid tenants (on a vacant property) can still be created.
Property__c vacantProperty = new Property__c(Name = 'Vacant Property');
insert vacantProperty;
Tenant__c validTenant = new Tenant__c(
Name = 'Valid Tenant',
Property__c = vacantProperty.Id,
Active__c = true
);
Test.startTest();
Database.SaveResult res
idTenant, false);
Test.stopTest();
System.assert(result.isSuccess(), 'The valid tenant should have been inserted success
}
}
Running tests synchronously...
Success
Logs
Tests
Checkpoints
Query Editor
View State
Progress
Problems
User
Application
Operation
Time
Status
Read
Size
Asma Ahamed.A
Unknown
/services/data/v64.0/to...
14/9/2025, 7:57:04 pm
Assertion Failed: Expect...
Unread
11.5 KB

Create the Apex Trigger



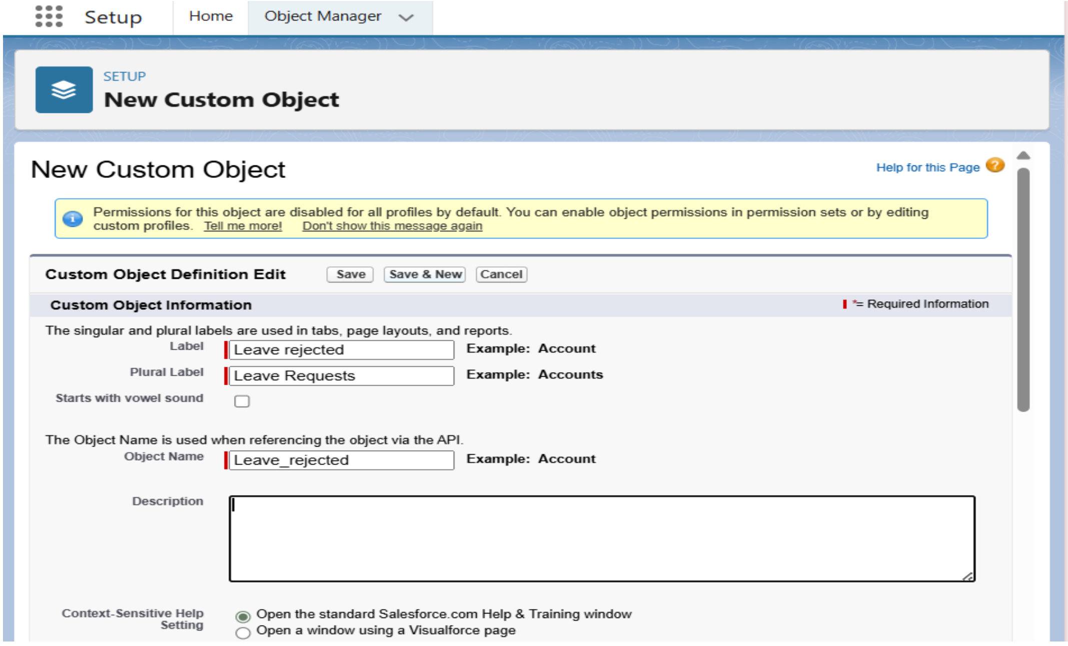
1. **Trigger:** Name it TenantTrigger.
2. **Select the Object:** Choose Tenant__c from the dropdown.

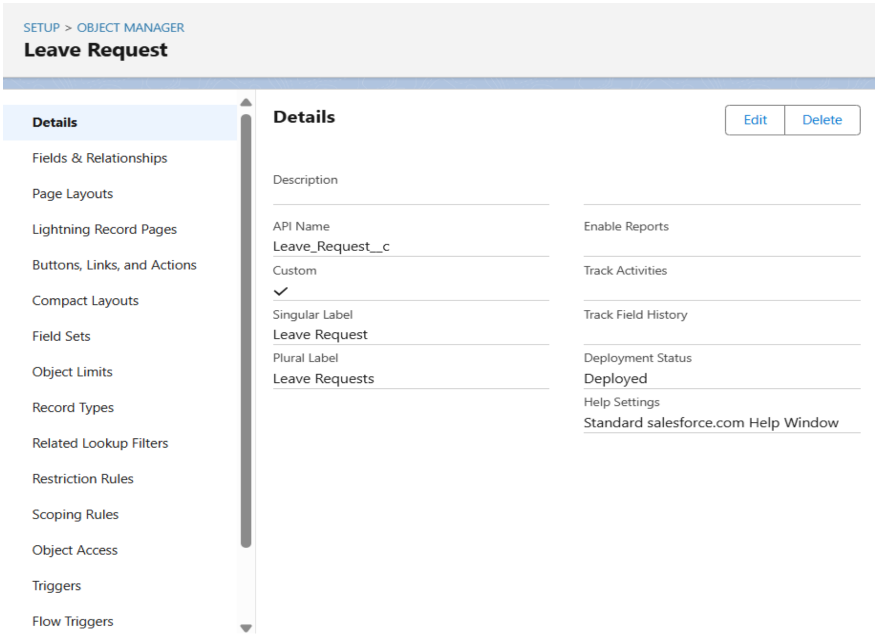


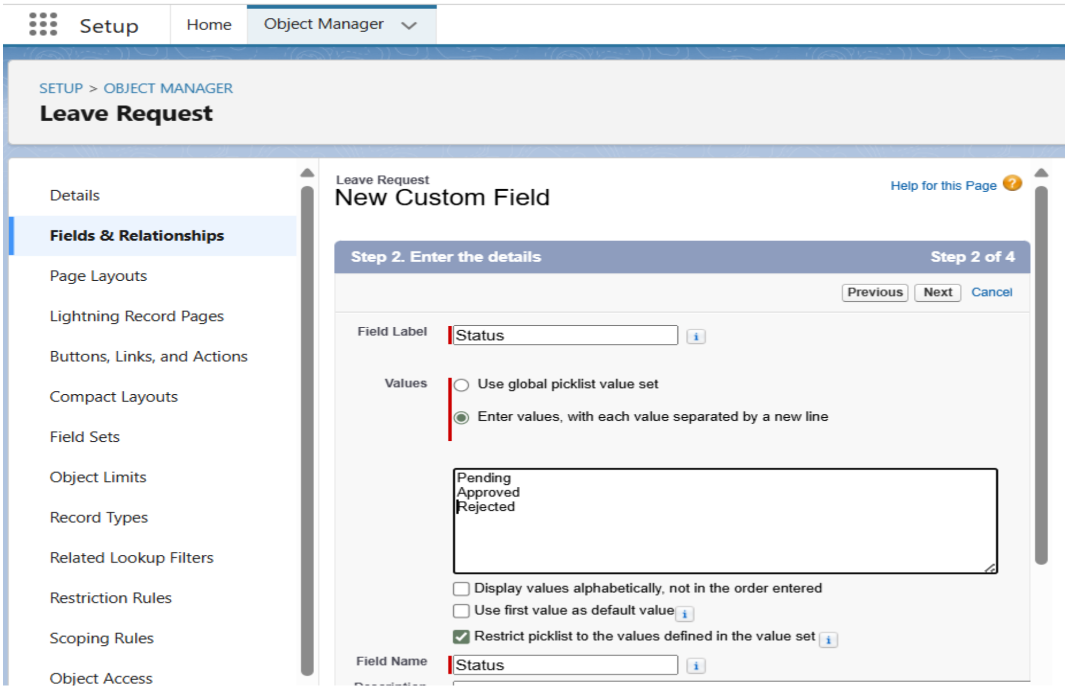

```
trigger TenantTrigger on Tenant__c (before insert, before update) {
   testHandler.preventDuplicateTenants(Trigger.new);
}
```

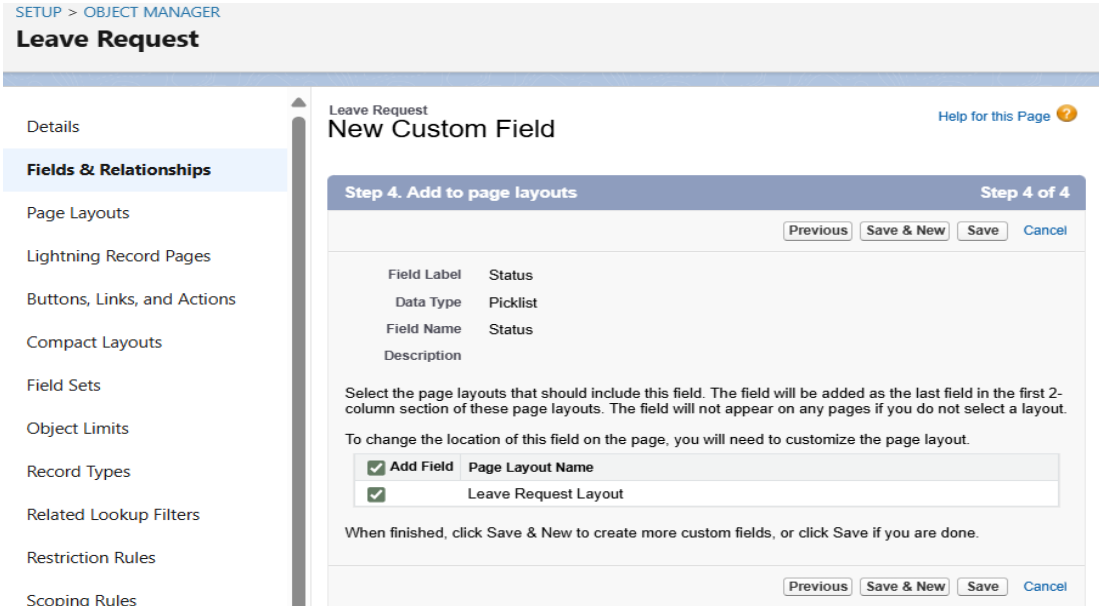
We have successfully created and saved the trigger!

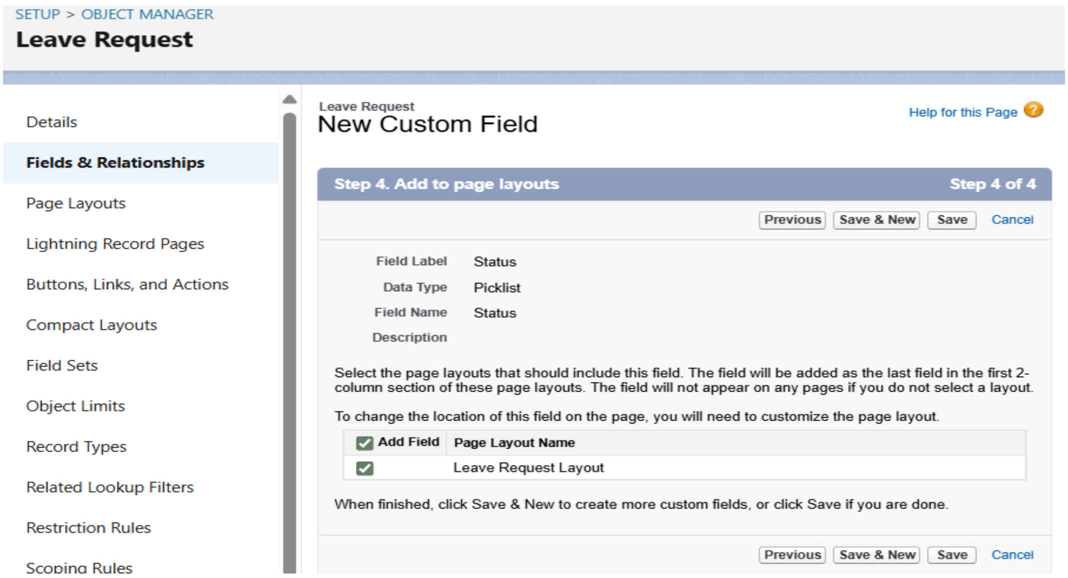
Leave request

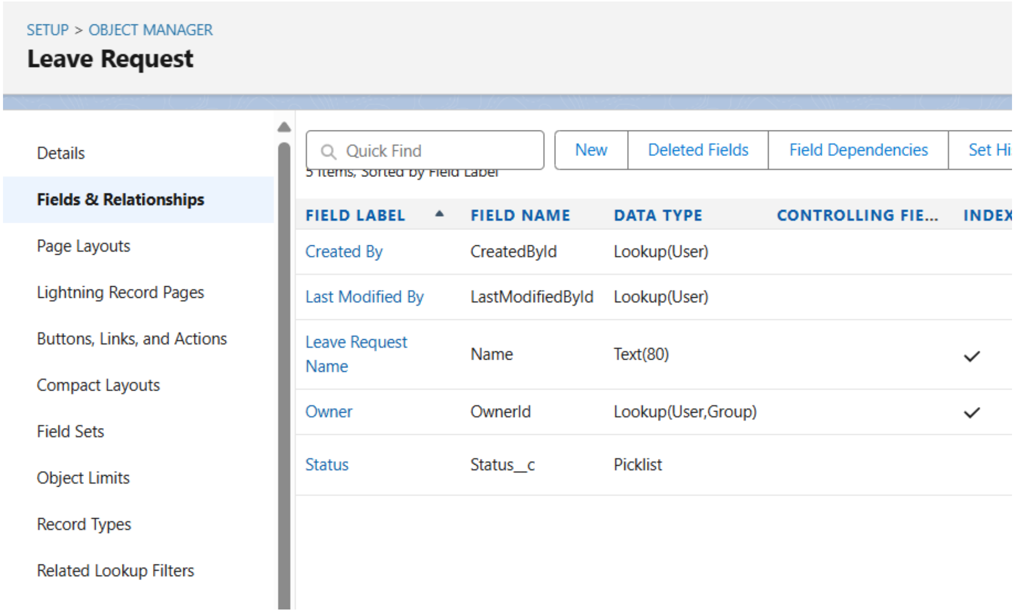


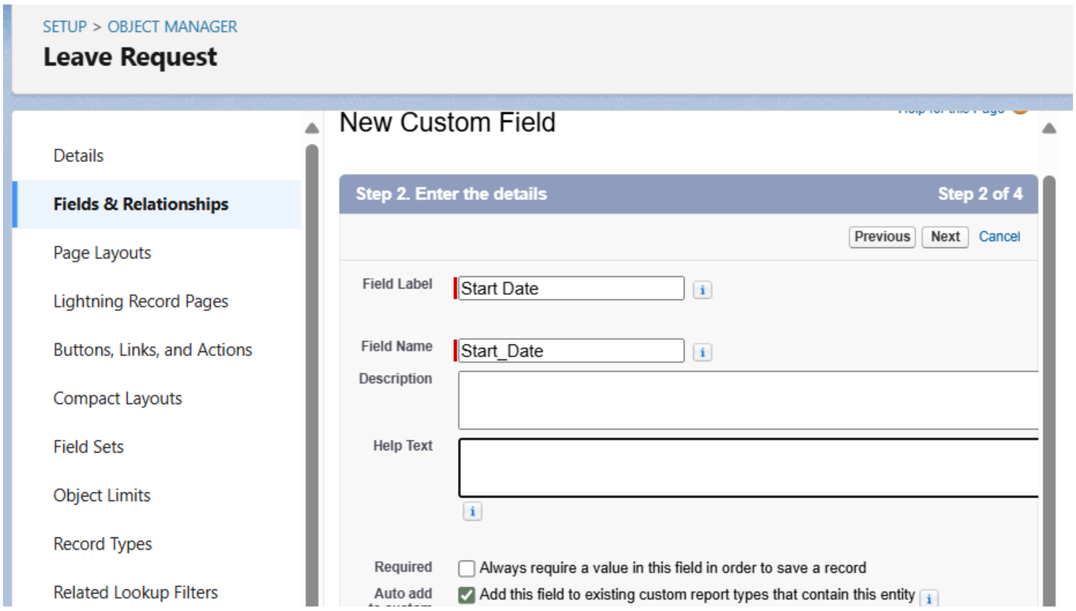


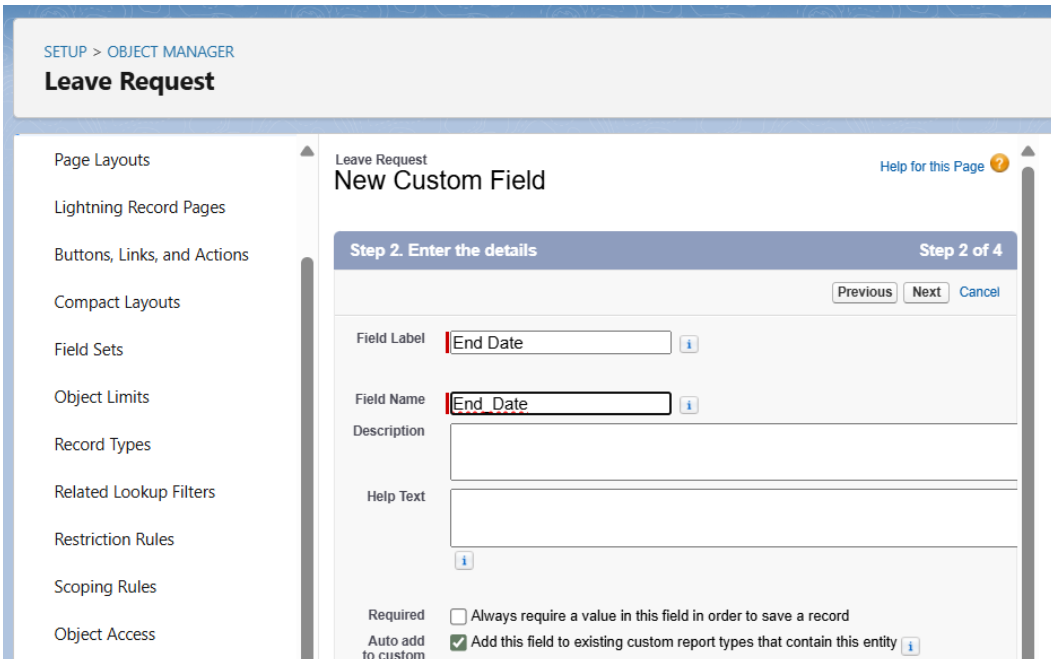

Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Leave Request
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Object Access
Leave Request
New Custom Field
Help for this Page
Step 2. Enter the details
Step 2 of 4
Previous
Next
Cancel
Field Label
Status
Values
Use global picklist value set
Enter values, with each value separated by a new line
Pending
Approved
Rejected
Display values alphabetically, not in the order entered
Use first value as default value
Restrict picklist to the values defined in the value set
Field Name
Status

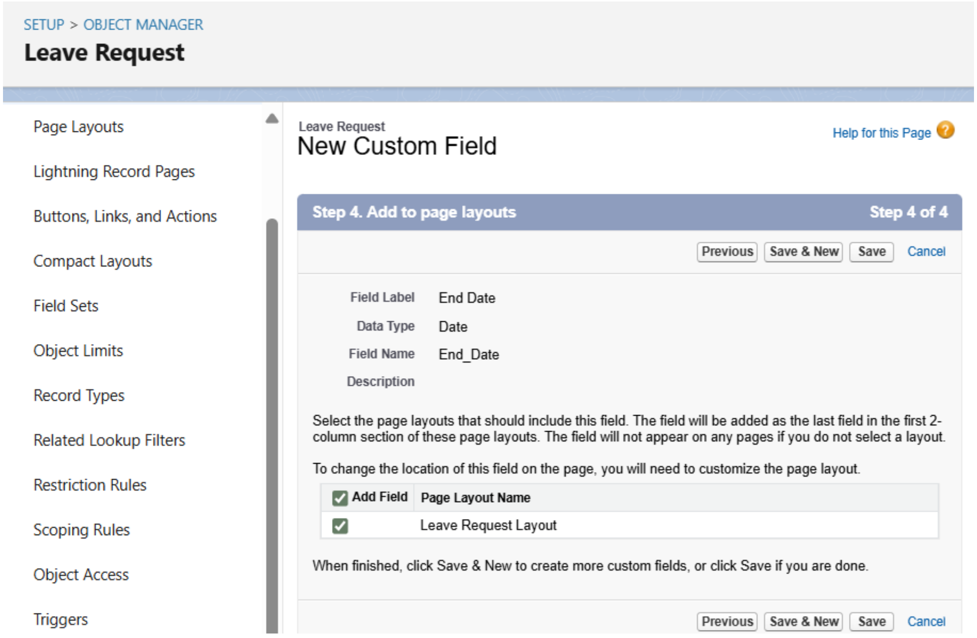

SETUP > OBJECT MANAGER
Leave Request
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Leave Request
New Custom Field
Help for this Page
Step 4. Add to page layouts
Step 4 of 4
Previous
Save & New
Save
Cancel
Field Label
Status
Data Type
Picklist
Field Name
Status
Description
Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.
To change the location of this field on the page, you will need to customize the page layout.
Add Field
Page Layout Name
Leave Request Layout
When finished, click Save & New to create more custom fields, or click Save if you are done.
Previous
Save & New
Save
Cancel

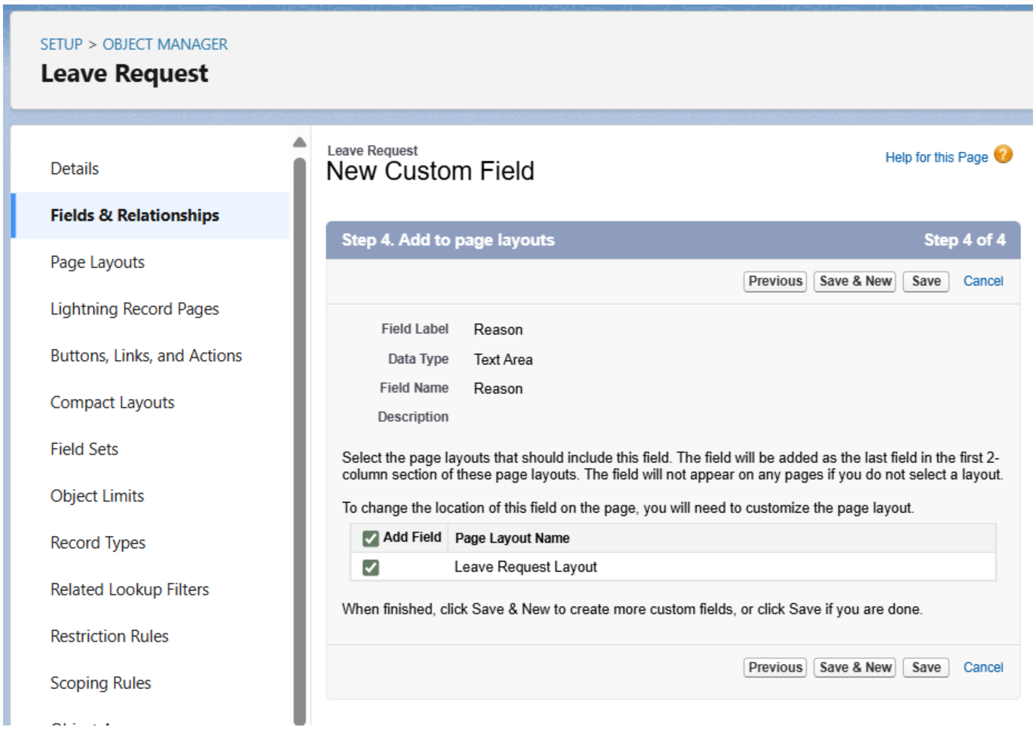

SETUP > OBJECT MANAGER
Leave Request
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Leave Request
New Custom Field
Help for this Page
Step 4. Add to page layouts
Step 4 of 4
Previous
Save & New
Save
Cancel
Field Label
Status
Data Type
Picklist
Field Name
Status
Description
Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.
To change the location of this field on the page, you will need to customize the page layout.
Add Field
Page Layout Name
Leave Request Layout
When finished, click Save & New to create more custom fields, or click Save if you are done.
Previous
Save & New
Save
Cancel

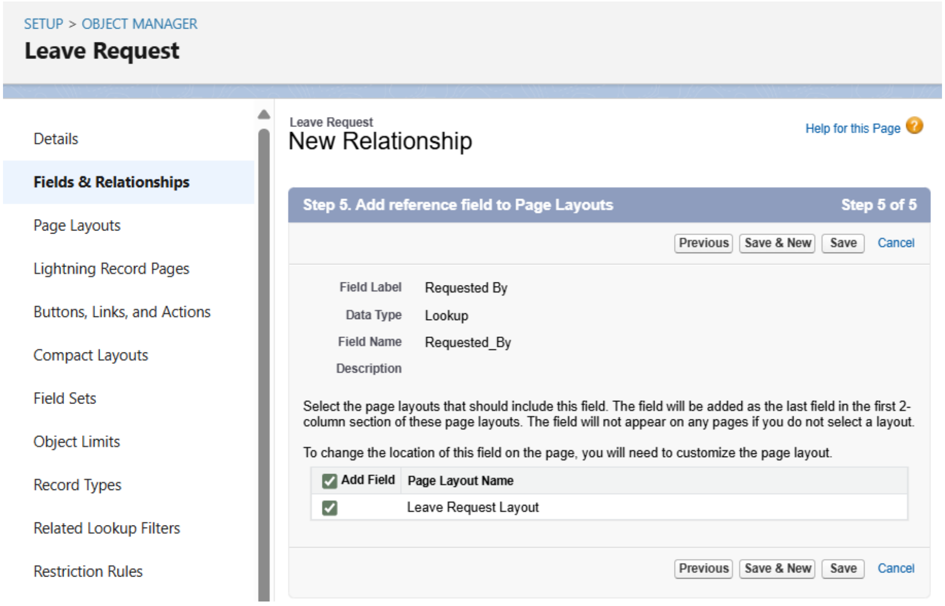

SETUP > OBJECT MANAGER
Leave Request
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Quick Find
New
Deleted Fields
Field Dependencies
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIE...
Created By
CreatedById
Lookup(User)
Last Modified By
LastModifiedById
Lookup(User)
Leave Request Name
Name
Text(80)
Owner
OwnerId
Lookup(User,Group)
Status
Status__c
Picklist

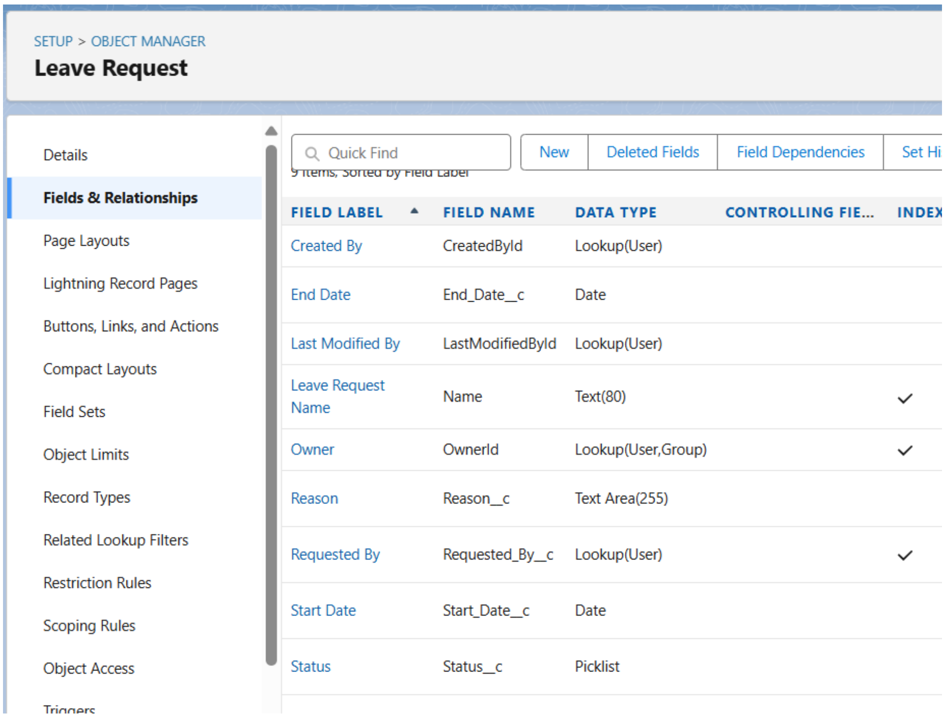

SETUP > OBJECT MANAGER
Leave Request
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
New Custom Field
Step 2. Enter the details
Step 2 of 4
Previous
Next
Cancel
Field Label
Start Date
Field Name
Start_Date
Description
Help Text
Required
Always require a value in this field in order to save a record
Auto add
Add this field to existing custom report types that contain this entity

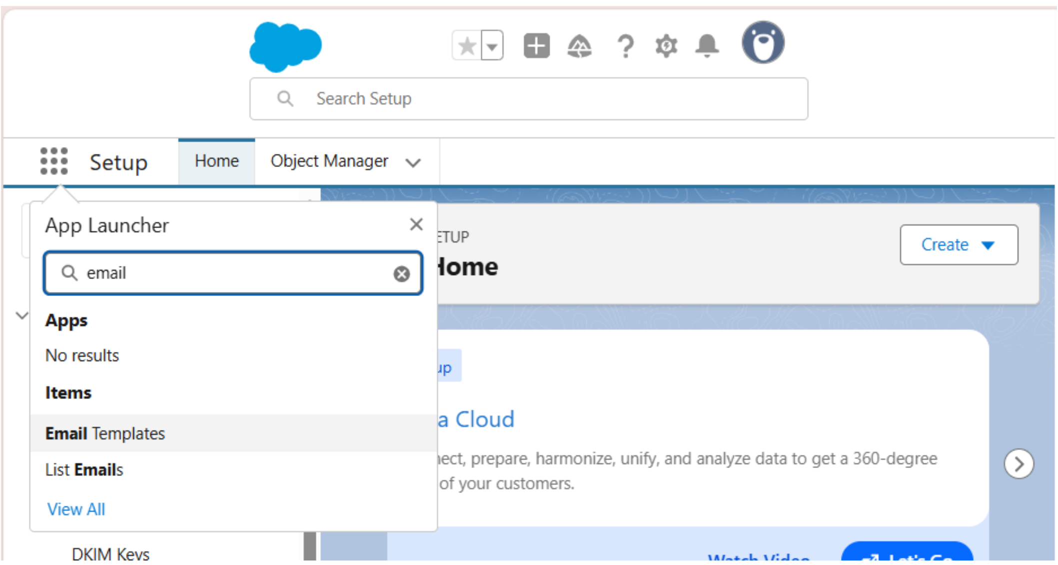

SETUP > OBJECT MANAGER
Leave Request
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Object Access
Leave Request
New Custom Field
Help for this Page
Step 2. Enter the details
Step 2 of 4
Previous
Next
Cancel
Field Label
End Date
Field Name
End_Date
Description
Help Text
Required
Always require a value in this field in order to save a record
Auto add to custom
Add this field to existing custom report types that contain this entity


SETUP > OBJECT MANAGER
Leave Request
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Object Access
Triggers
Leave Request
New Custom Field
Help for this Page
Step 4. Add to page layouts
Step 4 of 4
Previous
Save & New
Save
Cancel
Field Label
End Date
Data Type
Date
Field Name
End_Date
Description
Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.
To change the location of this field on the page, you will need to customize the page layout.
Add Field
Page Layout Name
Leave Request Layout
When finished, click Save & New to create more custom fields, or click Save if you are done.
Previous
Save & New
Save
Cancel

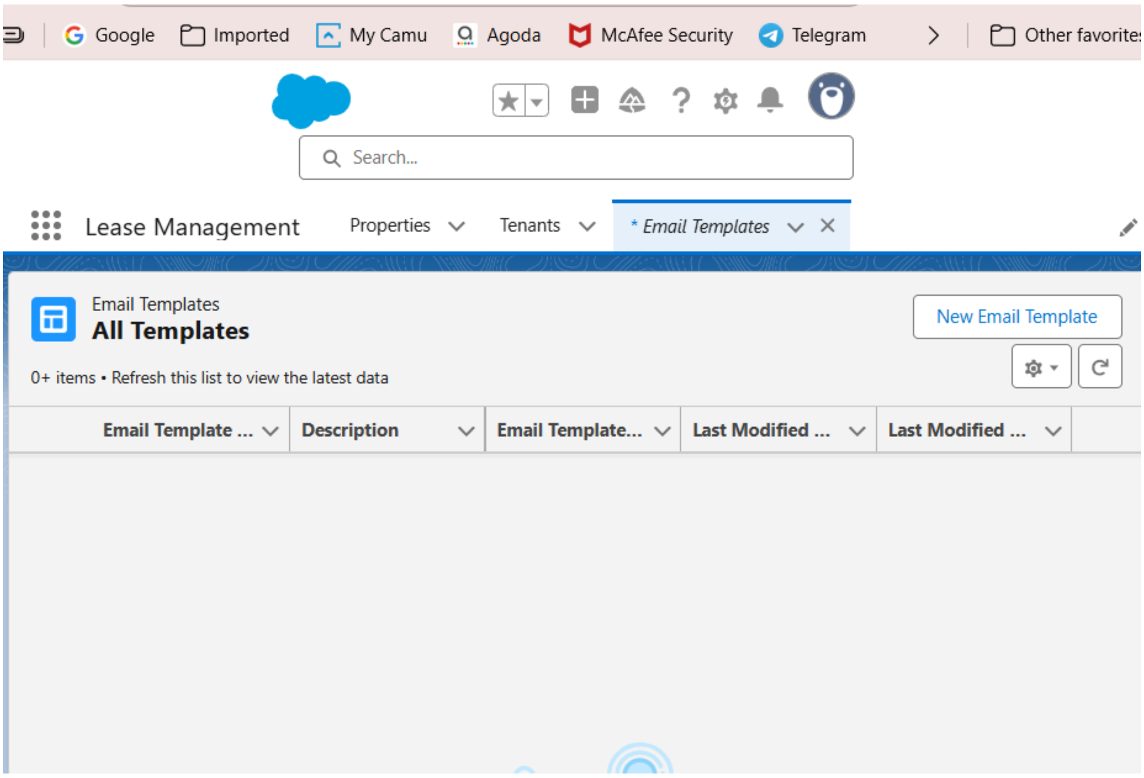

SETUP > OBJECT MANAGER
Leave Request
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Leave Request
New Custom Field
Help for this Page
Step 4. Add to page layouts
Step 4 of 4
Previous
Save & New
Save
Cancel
Field Label
Reason
Data Type
Text Area
Field Name
Reason
Description
Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.
To change the location of this field on the page, you will need to customize the page layout.
Add Field
Page Layout Name
Leave Request Layout
When finished, click Save & New to create more custom fields, or click Save if you are done.
Previous
Save & New
Save
Cancel

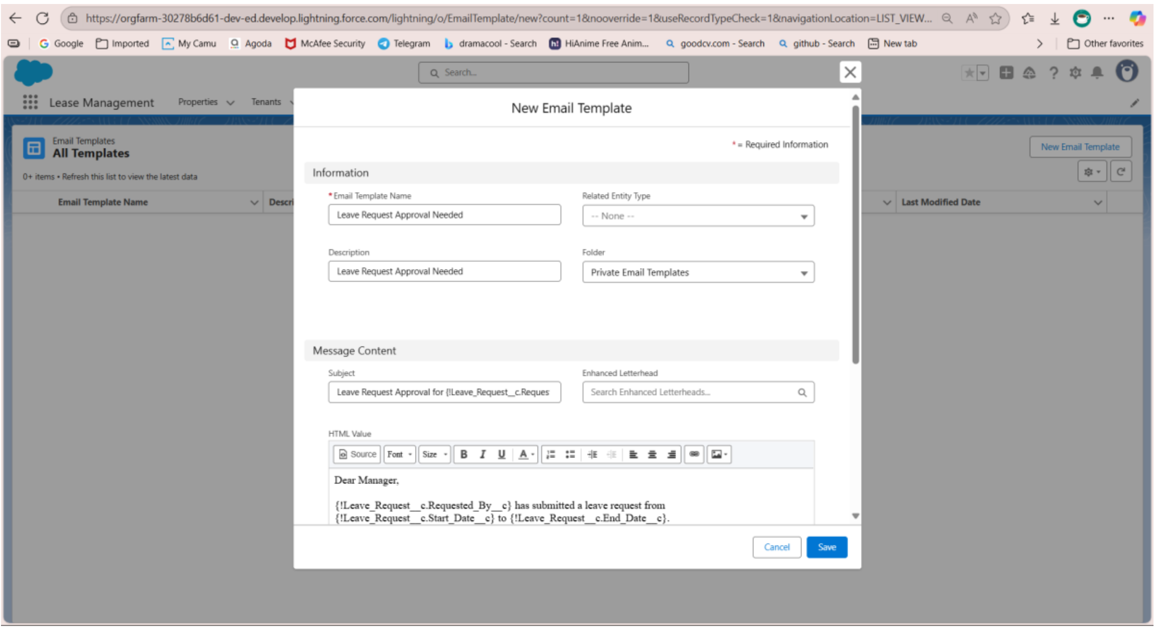

SETUP > OBJECT MANAGER
Leave Request
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Leave Request
New Relationship
Help for this Page
Step 5. Add reference field to Page Layouts
Step 5 of 5
Previous
Save & New
Save
Cancel
Field Label
Requested By
Data Type
Lookup
Field Name
Requested_By
Description
Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.
To change the location of this field on the page, you will need to customize the page layout.
Add Field
Page Layout Name
Leave Request Layout
Previous
Save & New
Save
Cancel

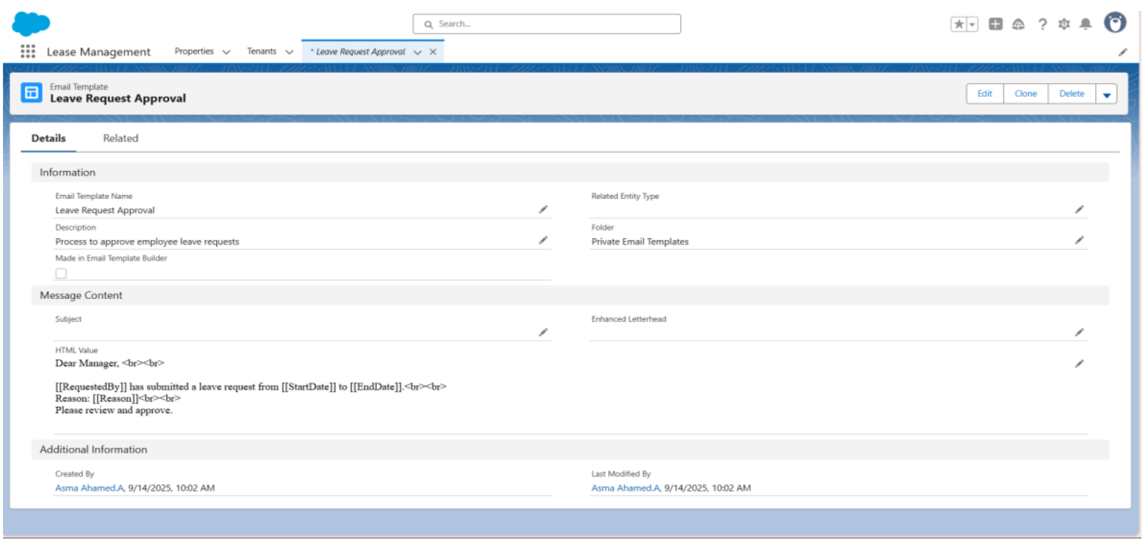

SETUP > OBJECT MANAGER
Leave Request
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Object Access
Quick Find
New
Deleted Fields
Field Dependencies
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIE...
INDEX
Created By
CreatedById
Lookup(User)
End Date
End_Date__c
Date
Last Modified By
LastModifiedById
Lookup(User)
Leave Request Name
Name
Text(80)
Owner
OwnerId
Lookup(User,Group)
Reason
Reason__c
Text Area(255)
Requested By
Requested_By__c
Lookup(User)
Start Date
Start_Date__c
Date
Status
Status__c
Picklist

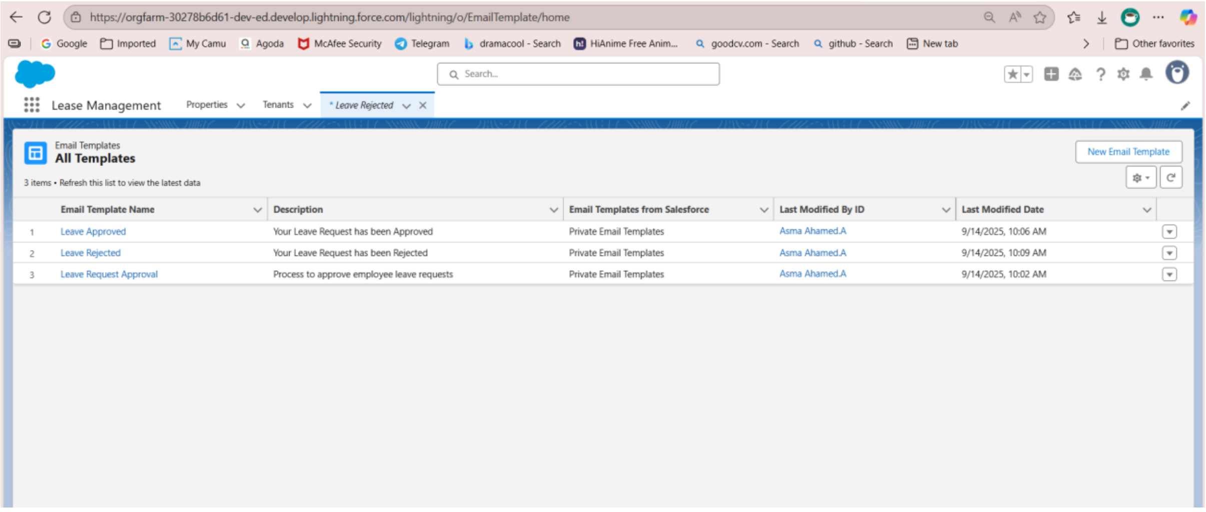

Search Setup
Setup
Home
Object Manager
App Launcher
email
Apps
No results
Items
Email Templates
List Emails
View All
DKIM Keys
Home
Create

Email template

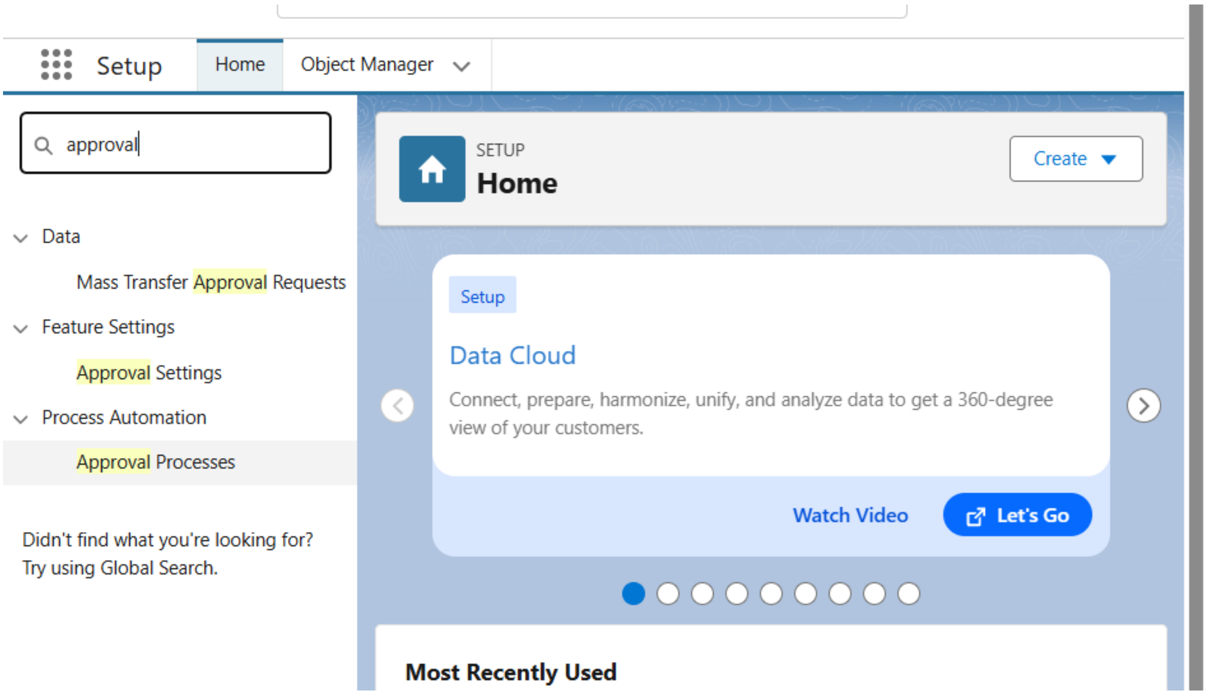




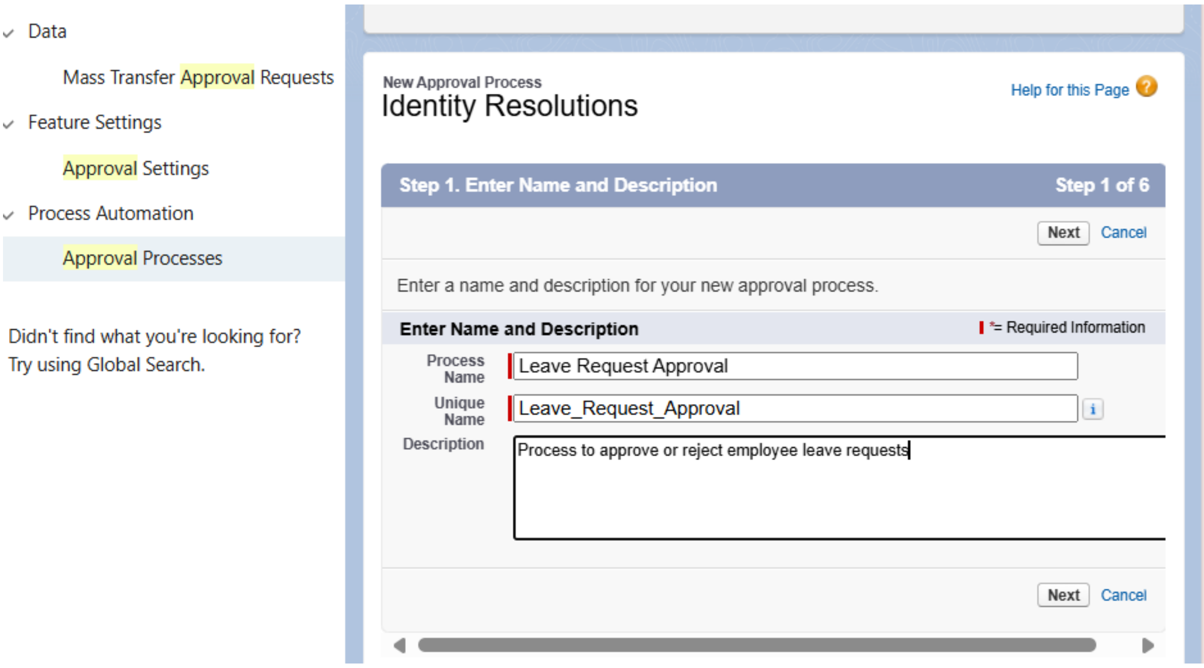




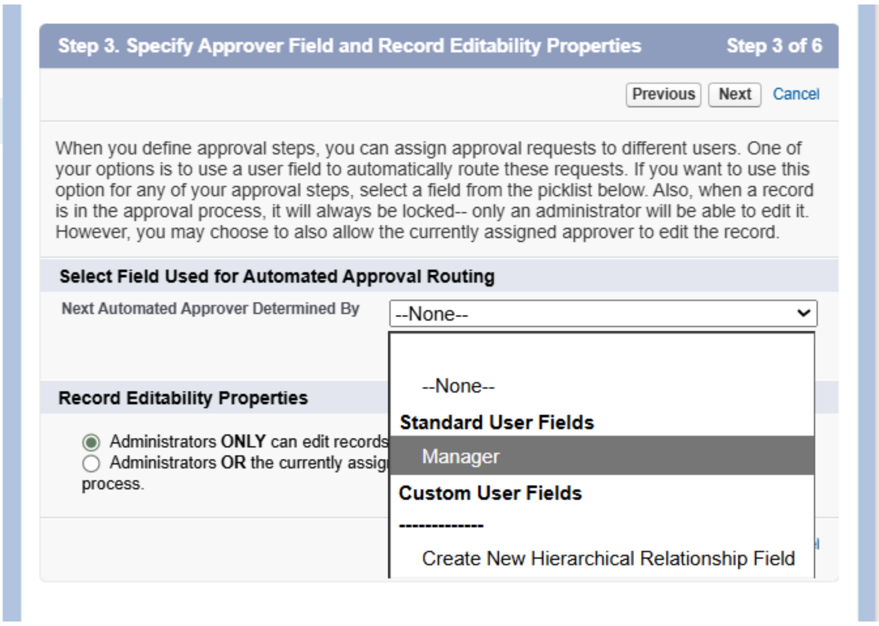
https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/o/EmailTemplate/home
Lease Management
Properties
Tenants
* Leave Rejected
Email Templates
All Templates
3 items • Refresh this list to view the latest data
New Email Template
Email Template Name
Description
Email Templates from Salesforce
Last Modified By ID
Last Modified Date
Leave Approved
Your Leave Request has been Approved
Private Email Templates
Asma Ahamed.A
9/14/2025, 10:06 AM
Leave Rejected
Your Leave Request has been Rejected
Private Email Templates
Asma Ahamed.A
9/14/2025, 10:09 AM
Leave Request Approval
Process to approve employee leave requests
Private Email Templates
Asma Ahamed.A
9/14/2025, 10:02 AM



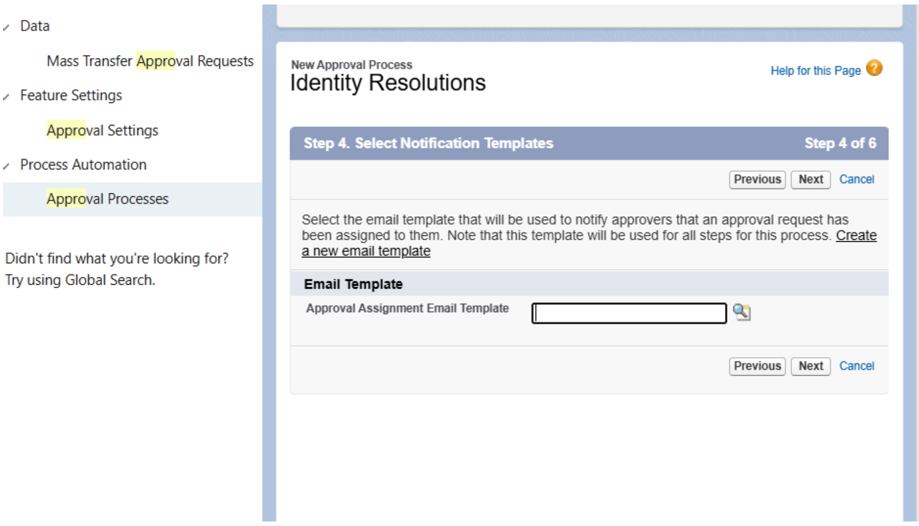
Setup
Home
Object Manager
approval
Data
Mass Transfer Approval Requests
Feature Settings
Approval Settings
Process Automation
Approval Processes
Didn't find what you're looking for?
Try using Global Search.
SETUP
Home
Create
Setup
Data Cloud
Connect, prepare, harmonize, unify, and analyze data to get a 360-degree view of your customers.
Watch Video
Let's Go
Most Recently Used

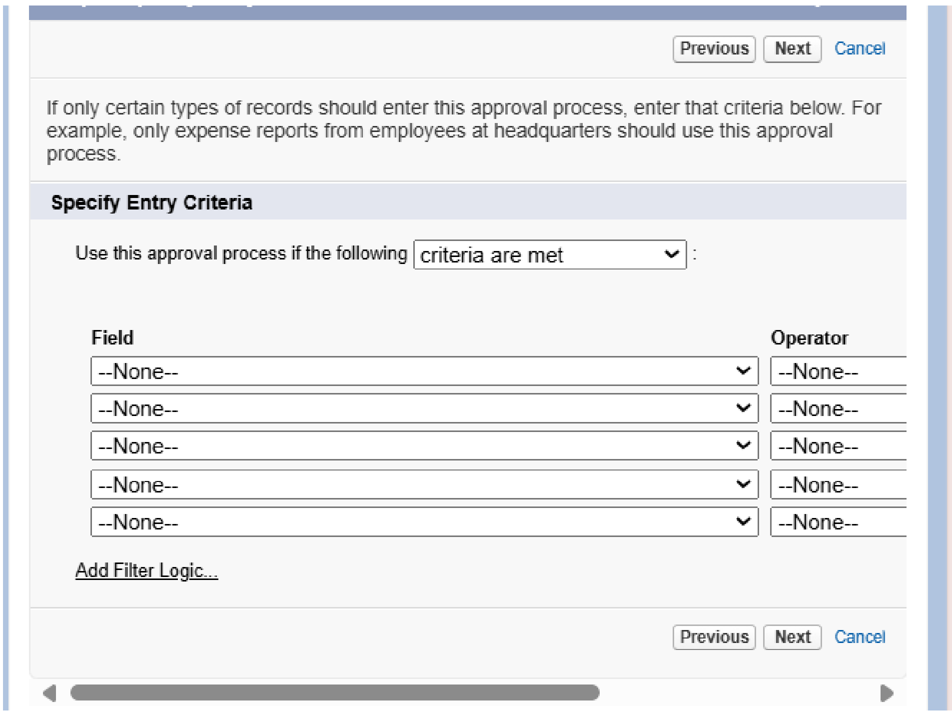


Data
Mass Transfer Approval Requests
Feature Settings
Approval Settings
Process Automation
Approval Processes
Didn't find what you're looking for?
Try using Global Search.
New Approval Process
Identity Resolutions
Help for this Page
Step 1. Enter Name and Description
Step 1 of 6
Next
Cancel
Enter a name and description for your new approval process.
Enter Name and Description
= Required Information
Process Name
Leave Request Approval
Unique Name
Leave_Request_Approval
Description
Process to approve or reject employee leave requests
Next
Cancel

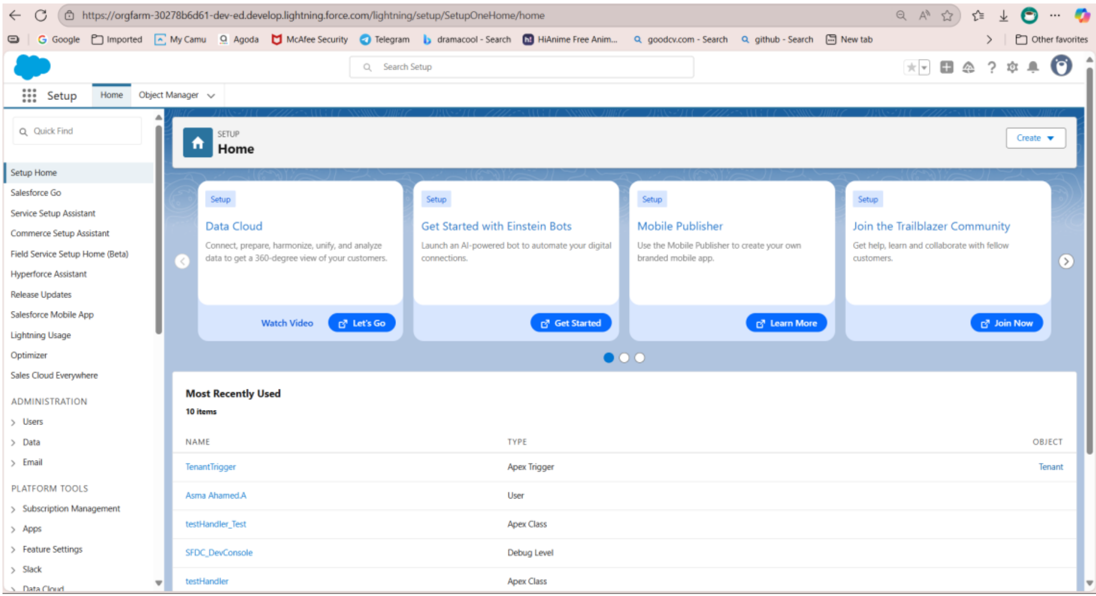

Step 3. Specify Approver Field and Record Editability Properties
Step 3 of 6
Previous
Next
Cancel
When you define approval steps, you can assign approval requests to different users. One of your options is to use a user field to automatically route these requests. If you want to use this option for any of your approval steps, select a field from the picklist below. Also, when a record is in the approval process, it will always be locked-- only an administrator will be able to edit it. However, you may choose to also allow the currently assigned approver to edit the record.
Select Field Used for Automated Approval Routing
Next Automated Approver Determined By
--None--
Record Editability Properties
Administrators ONLY can edit records
Administrators OR the currently assig
process.
--None--
Standard User Fields
Manager
Custom User Fields

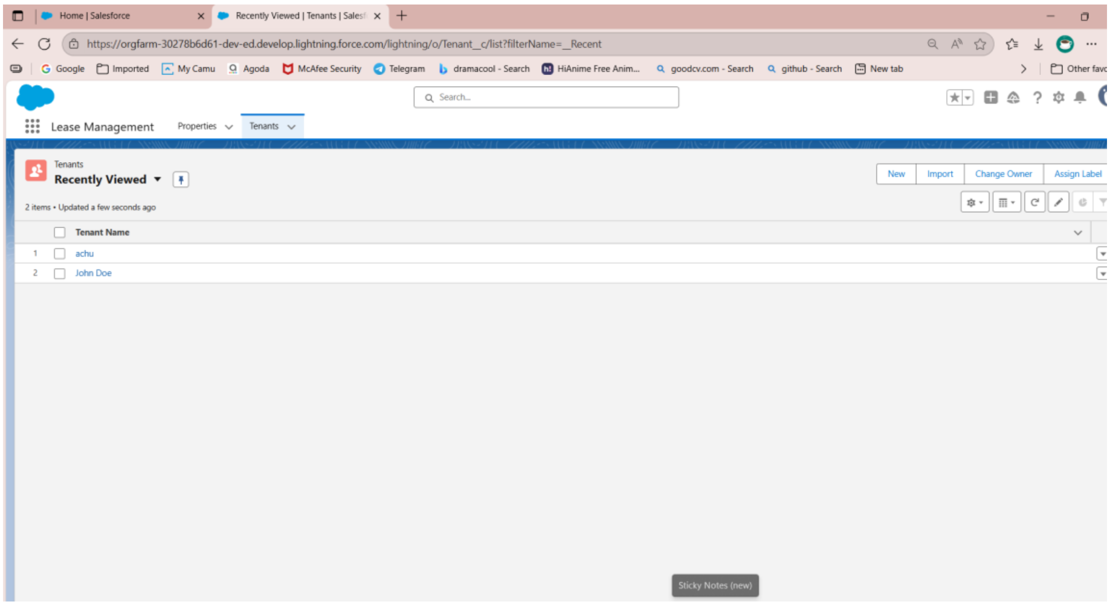
Create New Hierarchical Relationship Field

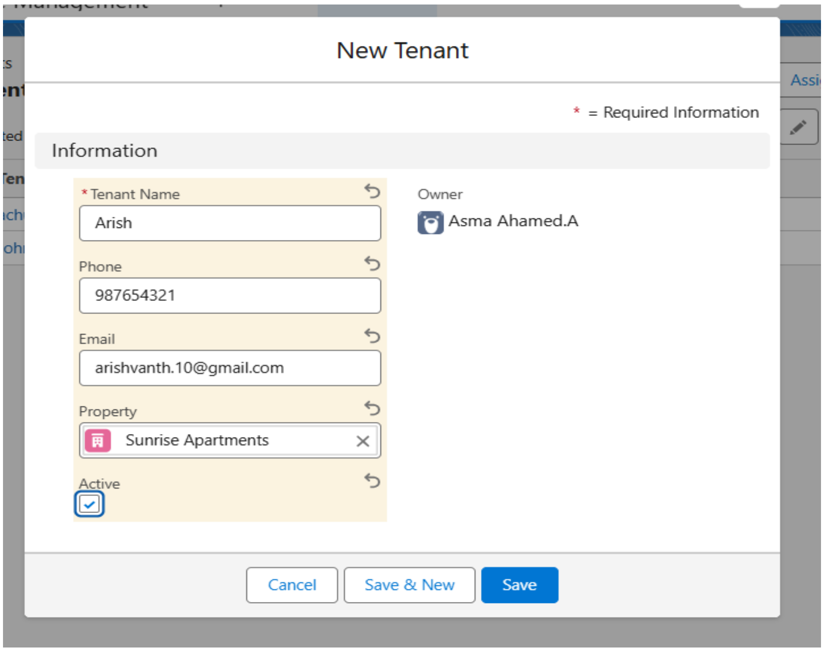

Data
Mass Transfer Approval Requests
Feature Settings
Approval Settings
Process Automation
Approval Processes
Didn't find what you're looking for?
Try using Global Search.
New Approval Process
Identity Resolutions
Help for this Page
Step 4. Select Notification Templates
Step 4 of 6
Previous
Next
Cancel
Select the email template that will be used to notify approvers that an approval request has been assigned to them. Note that this template will be used for all steps for this process. Create a new email template
Email Template
Approval Assignment Email Template
Previous
Next
Cancel

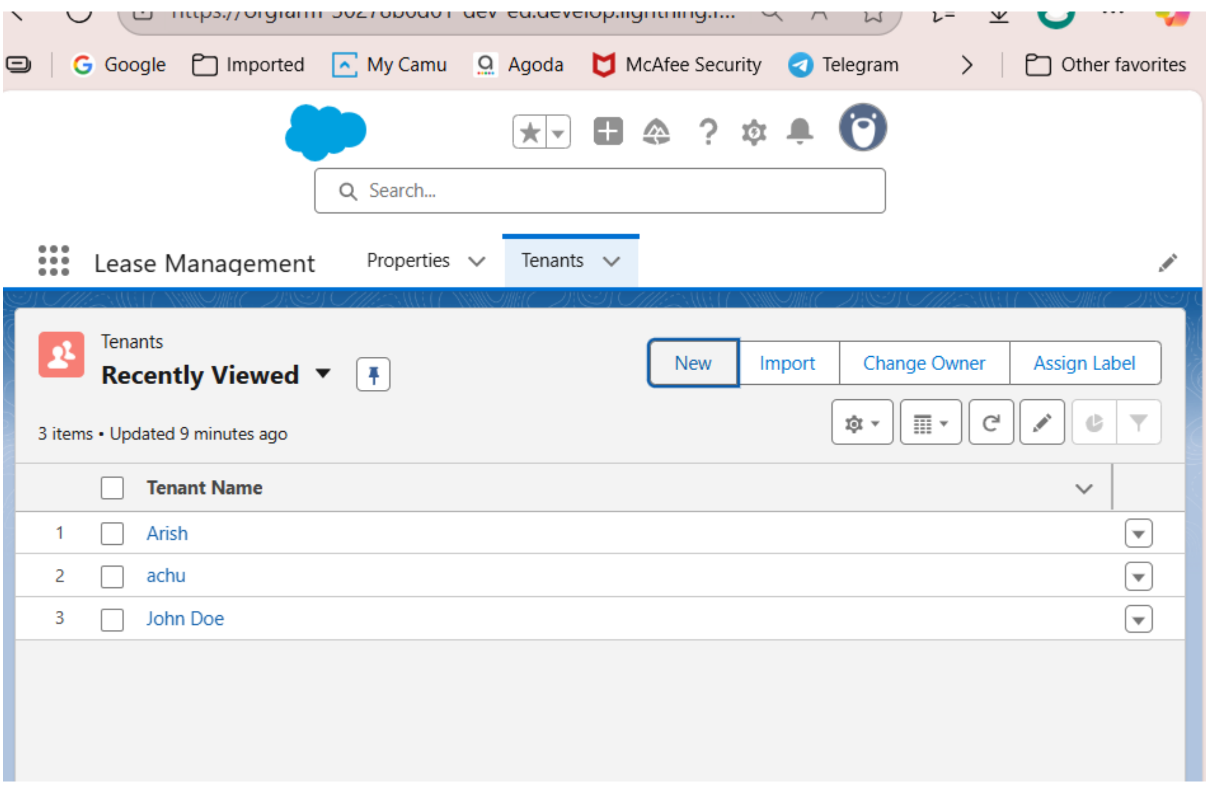

Previous
Next
Cancel
If only certain types of records should enter this approval process, enter that criteria below. For example, only expense reports from employees at headquarters should use this approval process.
Specify Entry Criteria
Use this approval process if the following criteria are met :
Field
Operator
--None--
--None--
--None--
--None--
--None--
--None--
--None--
--None--
--None--
--None--
Add Filter Logic...
Previous
Next
Cancel

Output:



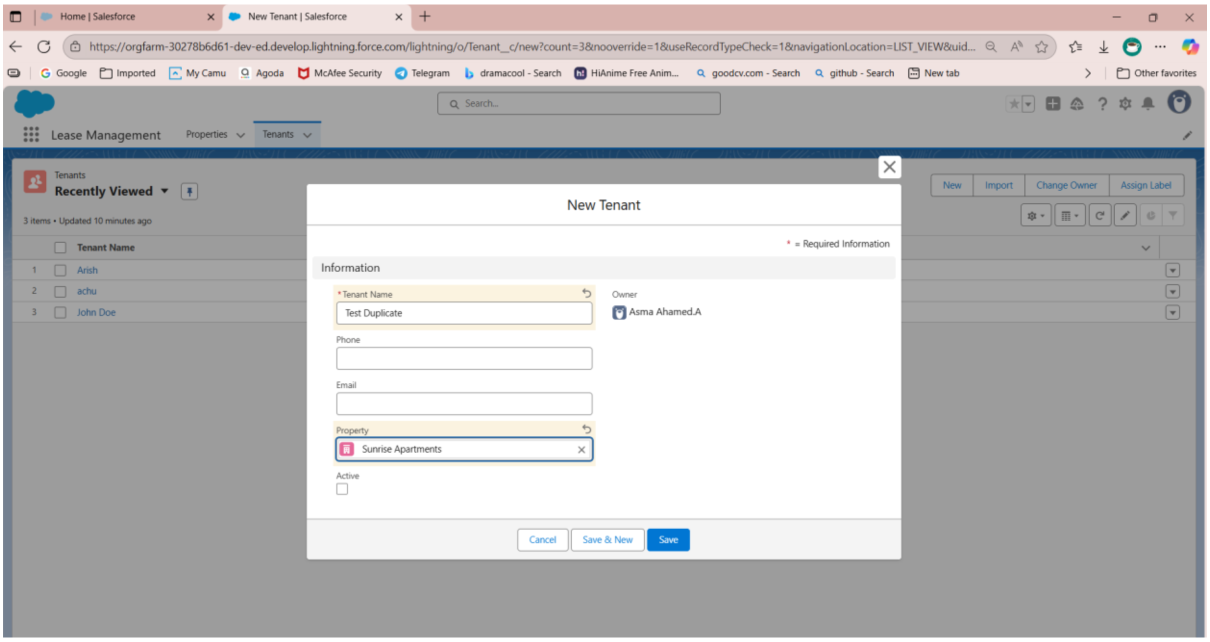


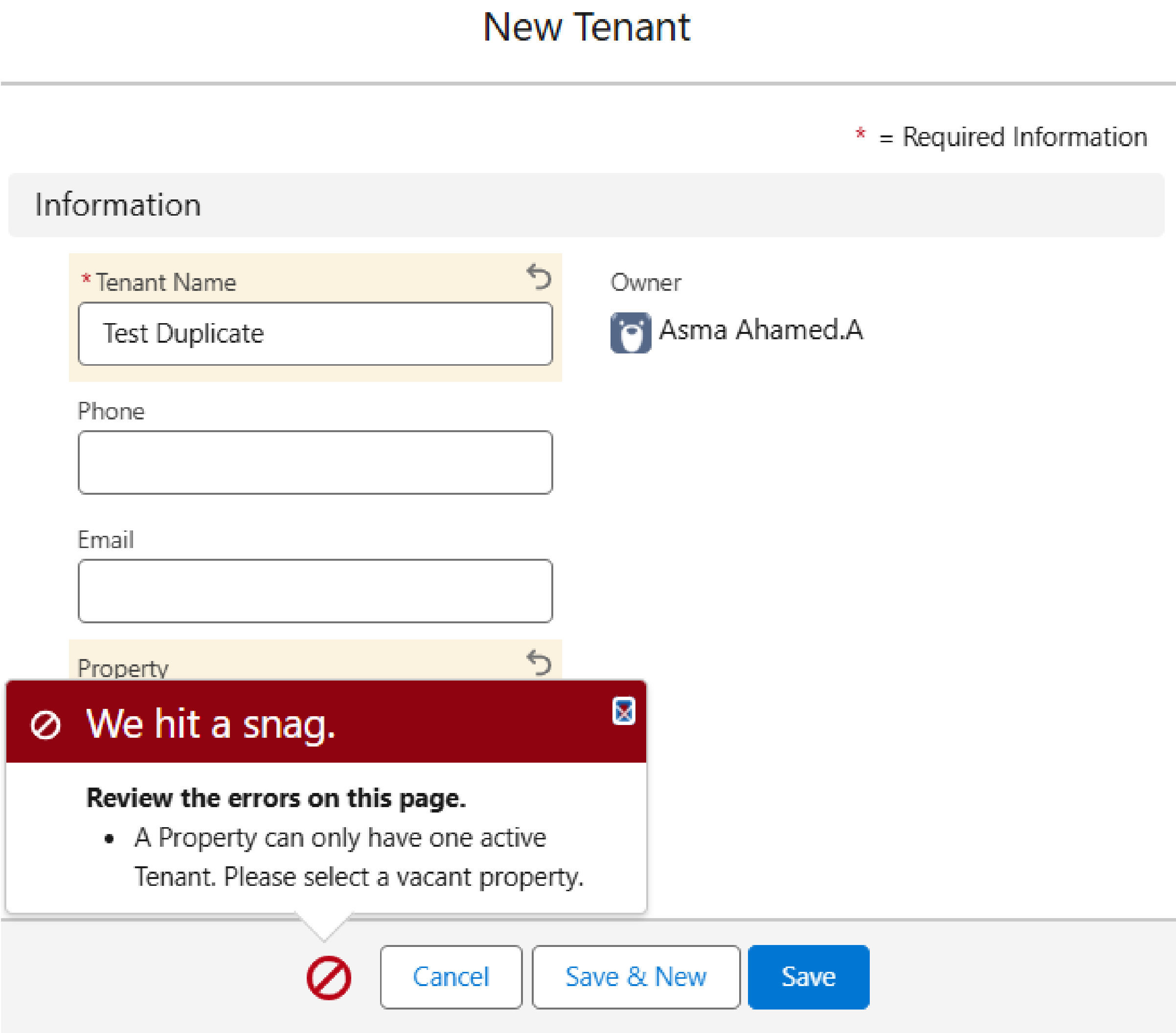




The code should **BLOCK** this save and show a **RED ERROR MESSAGE** at the top of the screen saying:

"A Property can only have one active Tenant. Please select a vacant property."


Home | Salesforce
New Tenant | Salesforce
Lease Management
Properties
Tenants
Tenants
Recently Viewed
3 items • Updated 10 minutes ago
Tenant Name
Arish
achu
John Doe
New
Import
Change Owner
Assign Label
New Tenant
* = Required Information
Information
* Tenant Name
Test Duplicate
Owner
Asma Ahamed.A
Phone
Email
Property
Sunrise Apartments
Active
Cancel
Save & New
Save


New Tenant
* = Required Information
Information
* Tenant Name
Test Duplicate
Owner
Asma Ahamed.A
Phone
Email
Property
We hit a snag.
Review the errors on this page.
• A Property can only have one active Tenant. Please select a vacant property.
Cancel
Save & New
Save

2.ADVANTAGES & BENEFITS

- **Automated Duplicate Prevention:** Eliminates multiple active tenants per property through validation rules and Apex triggers
- **Streamlined Communication:** Automated email alerts and approval processes reduce manual follow-ups
- **Centralized Data Management:** All lease-related information (properties, tenants, payments) in one platform
- **Real-time Updates:** Instant status tracking for lease applications, approvals, and maintenance requests
- **Mobile Accessibility:** Accessible via Salesforce mobile app for on-the-go management

2.1CHALLENGES & CONSIDERATIONS

- **Initial Setup Complexity:** Requires custom object creation and Apex development
- **Training Requirements:** Staff needs training for Salesforce interface and processes
- **Ongoing Maintenance:** Regular updates needed for changing business rules
- **Integration Needs:** May require additional integration with accounting systems
- **Cost Considerations:** Salesforce licensing and potential development costs

3.CONCLUSION

The Lease Management System represents a significant digital transformation in property management operations. By leveraging Salesforce's robust platform, the system successfully automates critical processes including tenant screening, lease management, and communication workflows. The implementation demonstrates how cloud-based solutions can enhance operational efficiency, reduce errors, and provide real-time visibility into portfolio performance. This foundation also allows for future scalability and integration with additional property management functionalities as business needs evolve.