

PROJECT TITLE

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College Code: CD

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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:

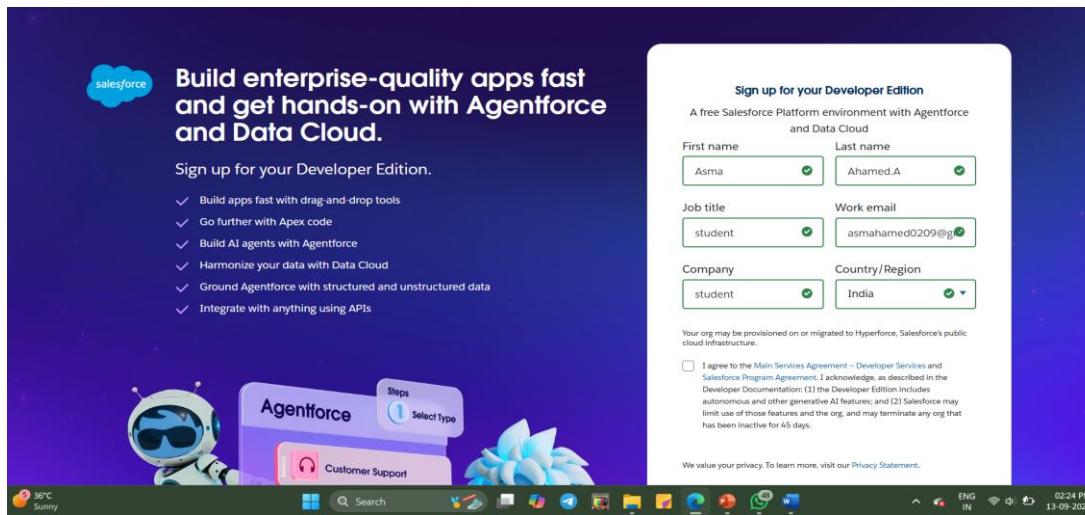
- **Automation of Lease Operations:** Reduce manual efforts by automating repetitive tasks such as property status updates, payment reminders, and lease expiration notifications.
- **Real-Time Tracking of Properties:** Provide instant visibility of whether a property is available (Vacant) or occupied, 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>



The screenshot shows the 'Seller Home' dashboard. It includes sections for 'Close Deals', 'Plan My Accounts', 'Grow Relationships', 'Build Pipeline', 'My Goals', and a 'Stay ahead of incidents' alert. The 'Close Deals' section shows a total pipeline of \$0 with 0 Open, 0 Won, and 0 Lost opportunities. The 'Plan My Accounts' section shows 0 Accounts with 0 Upcoming Activity, 0 Past Activity, and 0 No Activity. The 'Grow Relationships' section shows 0 Contacts with 0 Upcoming Activity, 0 Past Activity, and 0 No Activity. The 'Build Pipeline' section shows 0 Leads with 0 Upcoming Activity and 0 Past Activity. The 'My Goals' section allows users to set weekly or monthly goals for emails, calls, and meetings. A 'Stay ahead of incidents' alert is displayed, encouraging users to help their teams proactively respond to large-scale disruptions with the free Customer Service Incident Management solution from Service Cloud. The URL in the browser bar is <https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/setup/IncidentManagement/home>.

Created objects: Property, Tenant, Lease, Payment

The screenshot shows the 'Object Manager' setup page. It lists various objects: Account, Activity, Address, Agent Work, Alternative Payment Method, API Anomaly Event Store, Appointment Category, Appointment Invitation, Appointment Invitee, Appointment Topic Time Slot, Approval Submission, Approval Submission Detail, and Approval Work Item. The objects are sorted by Label. The 'Custom Object' tab is selected, showing 'Custom Object from Spreadsheet' as the current item. The URL in the browser bar is <https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home>.

New Custom Object

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

Custom Object 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:

Contact-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

Tabs

New Custom Object Tab

Step 1. Enter the Details

Choose the custom object for this new custom tab. Fill in other details.

New Custom Object Tab

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:

Step 1 of 3

New Custom Object Tab

Step 2. Add to Profiles

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	Default On
Analytics Cloud Security User	Default On
Anypoint Integration	Default On
Authenticated Website	Default On
Authenticated Website	Default On
B2B Reordering Portal Buyer Profile	Default On
Contract Manager	Default On
Cross Org Data Proxy User	Default On
Custom: Marketing Profile	Default On
Custom: Sales Profile	Default On
Custom: Support Profile	Default On
Customer Community Login User	Default On
Customer Community Plus Login User	Default On
Customer Community Plus User	Default On

Step 2 of 3

SETUP Tabs

Step 3. Add to Custom Apps

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)	<input checked="" type="checkbox"/>
Sales (standard_Sales)	<input checked="" type="checkbox"/>
Service (standard_Service)	<input checked="" type="checkbox"/>
Marketing CRM Classic (standard_Marketing)	<input checked="" type="checkbox"/>
Sample Console (standard_ServiceConsole)	<input checked="" type="checkbox"/>
High Volume Customer Portal User	<input checked="" type="checkbox"/>
Authenticated Website User	<input checked="" type="checkbox"/>
App Launcher (standard_AppLauncher)	<input checked="" type="checkbox"/>
Community (standard_Community)	<input checked="" type="checkbox"/>
Site.com (standard_Sites)	<input checked="" type="checkbox"/>
Salesforce Chatter (standard_Chatter)	<input checked="" type="checkbox"/>
Content (standard_Content)	<input checked="" type="checkbox"/>
Analytics Studio (standard_Insights)	<input checked="" type="checkbox"/>
Sales Console (standard_LightningSalesConsole)	<input checked="" type="checkbox"/>
Service Console (standard_LightningService)	<input checked="" type="checkbox"/>
Sales (standard_lightningSales)	<input checked="" type="checkbox"/>
Lightning Usage App (standard_LightningInstrumentation)	<input checked="" type="checkbox"/>
Digital Experiences (standard_SalesforceCMS)	<input checked="" type="checkbox"/>

Step 3 of 3

SETUP Home Object Manager

Tenant

Edit Custom Object Tenant

Custom Object 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 **Plural Label:** Tenants

Object Name: Tenant **Description:**

Context-Sensitive Help Setting: Open the standard Salesforce.com Help & Training window

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 **Description:**

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.

SETUP Home Object Manager

New Custom Object Tab

Step 1. Enter the Details

Choose the custom object for this new custom tab. Fill in other details.

New Custom Object Tab

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

Step 1 of 3

Manager ▾

SETUP Tabs

New Custom Object Tab

Step 2. Add to Profiles

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	Default On
Analytics Cloud Security User	Default On
Anypoint Integration	Default On
Authenticated Website	Default On
Authenticated Website	Default On
B2B Reordering Portal Buyer Profile	Default On
Contact Manager	Default On
Cross Org Data Proxy User	Default On
Custom: Marketing Profile	Default On
Custom: Sales Profile	Default On
Custom: Support Profile	Default On
Customer Community Login User	Default On
Customer Community Plus Login User	Default On
Customer Community Plus User	Default On

Help for this Page

Step 2 of 3

SETUP Tabs

Step 3. Add to Custom Apps

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)	<input checked="" type="checkbox"/>
Sales (standard_Sales)	<input checked="" type="checkbox"/>
Service (standard_Service)	<input checked="" type="checkbox"/>
Marketing CRM Classic (standard_Marketing)	<input checked="" type="checkbox"/>
Sample Console (standard_ServiceConsole)	<input checked="" type="checkbox"/>
High Volume Customer Portal User	<input checked="" type="checkbox"/>
Authenticated Website User	<input checked="" type="checkbox"/>
App Launcher (standard_AppLauncher)	<input checked="" type="checkbox"/>
Community (standard_Community)	<input checked="" type="checkbox"/>
Site.com (standard_Sites)	<input checked="" type="checkbox"/>
Salesforce Chatter (standard_Chatter)	<input checked="" type="checkbox"/>
Content (standard_Content)	<input checked="" type="checkbox"/>
Analytics Studio (standard_Insights)	<input checked="" type="checkbox"/>
Sales Console (standard_LightningSalesConsole)	<input checked="" type="checkbox"/>
Service Console (standard_LightningService)	<input checked="" type="checkbox"/>
Sales (standard_LightningSales)	<input checked="" type="checkbox"/>
Lightning Usage App (standard_LightningInstrumentation)	<input checked="" type="checkbox"/>
Digital Experiences (standard_SalesforceCMS)	<input checked="" type="checkbox"/>

Step 3 of 3

Setup Home Object Manager ▾

SETUP > OBJECT MANAGER

Tenant

Details

Fields & Relationships	Description
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

API Name	Tenant_c
Custom	<input checked="" type="checkbox"/>
Singular Label	Tenant
Plural Label	Tenants
Enable Reports	<input checked="" type="checkbox"/>
Track Activities	<input checked="" type="checkbox"/>
Track Field History	
Deployment Status	Deployed
Help Settings	
Standard salesforce.com Help Window	

Edit Delete

SETUP > OBJECT MANAGER
Tenant

Fields & Relationships

4 Items, Sorted by Field Label

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)		

Conditional Field Formatted

SETUP > OBJECT MANAGER
Tenant

Fields & Relationships

External Lookup Relationship

- 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.
- Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Allow 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 pop-up calendar.

Allows users to enter a date and time, or pick a date from a pop-up calendar. When users click a date in the pop-up, that date and the current time are entered into the DateTime field.

Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

Allows users to enter any number. Leading zeros are removed.

Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.

Allows users to enter any phone number. Automatically formats it as a phone number.

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.

Allows users to enter up to 255 characters on separate lines.

Allows users to enter up to 131,072 characters on separate lines.

Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

Allows users to enter any combination of letters and numbers and store them in encrypted form.

Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50:00" are all valid times for this field.

Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

Google Imported My Camu Agoda McAfee Security telegram dramacool - Search HiAnime Free Anim... goodcv.com - Search github - Search New tab Other favorites

Setup Home Object Manager

SETUP > OBJECT MANAGER
Tenant

Insert New Custom Field

Step 2. Enter the details Step 2 of 4

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

Use formula editor. Enclose text and picklist value API names in double quotes. ('This', 'etc'), include numbers without commas (123), show percentages as decimal (.100), and express date calculations in the standard format ('1/1/00') + 7. To reference a field from a Custom Metadata type record use @CustomMetadataType__Name__c

Previous Next Cancel

Tenant
New Custom Field

Step 3. Establish field-level security

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	<input type="checkbox"/> Visible	<input type="checkbox"/> Read Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input type="checkbox"/>	<input type="checkbox"/>
B2B Reordering Portal Buyer Profile	<input type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Community User	<input type="checkbox"/>	<input type="checkbox"/>

Help for this Page ?

Step 3 of 4

Previous Next Cancel

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

Step 4. Add to page layouts

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.

Help for this Page ?

Step 4 of 4

Previous Save & New Save Cancel

https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000002EcKP/FieldsAndRelationships/view

Setup Home Object Manager

Search Setup

Fields & Relationships

5 Items. Sorted by Field Label

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)		✓

Quick Find New Deleted Fields Field Dependencies Set History Tracking

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

<https://orgfarm-30278bd6d1-dev.develop.lightning.force.com/lightning/setup/ObjectManager/01gK000002EcKP/FieldsAndRelationships/new>

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
- Conditional Field Formatters

The relationship field allows users to click on a lookup icon to select a value from a pop-up list. The master object is the source of the values in the list.

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

External Lookup Relationship

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 pop-up calendar.

Allows users to enter a date and time, or pick a date from a pop-up calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.

Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

Allows users to define locations, includes latitude and longitude components, and can be used to calculate distance.

Allows users to enter any number. Leading zeros are removed.

Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.

Allows users to enter any phone number. Automatically formats it as a phone number.

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.

Allows users to enter up to 255 characters on separate lines.

Allows users to enter up to 131,072 characters on separate lines.

Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

Allows users to enter any combination of letters and numbers and store them in encrypted form.

Allows users to enter a local time. For example, '2:40 PM', '14:40', '14:40:00', and '14:40:50:00' are all valid times for this field.

Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

Next Cancel

<https://orgfarm-30278bd6d1-dev.develop.lightning.force.com/lightning/setup/ObjectManager/01gK000002EcKP/FieldsAndRelationships/new>

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
- Conditional Field Formatters

Tenant New Custom Field

Step 2. Enter the details Step 2 of 4

Help for this Page

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

Use formula syntax: Enclose text and formula value with single quotes ('Text') or double quotes ("Text"). Include numbers without quotes. Use @ to store values as @P1, and express date calculations in the standard format (Now() + 7). To reference a field from a Custom Metadata type record use @CustomMetadata__Type__Name__RecordName@_c

Previous Next Cancel

<https://orgfarm-30278bd6d1-dev.develop.lightning.force.com/lightning/setup/ObjectManager/01gK000002EcKP/FieldsAndRelationships/new>

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
- Conditional Field Formatters

Tenant New Custom Field

Step 3. Establish field-level security Step 3 of 4

Help for this Page

Previous Next Cancel

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input type="checkbox"/>	<input type="checkbox"/>
Authenticated Portal	<input type="checkbox"/>	<input type="checkbox"/>
B2B Reordering Portal Buyer Profile	<input type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Community Login User	<input type="checkbox"/>	<input type="checkbox"/>

The screenshot shows the 'New Custom Field' page in the Object Manager. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, and Record Types. The main area is titled 'Step 4. Add to page layouts' with a sub-header 'Tenant New Custom Field'. It shows a table with one row: Field Label: Email, Data Type: Email, Field Name: Email, and Description: (empty). Below the table, it says '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.' There are two checkboxes: 'Add Field' (checked) and 'Page Layout Name' (checked), with 'Tenant Layout' selected. At the bottom, there's a note 'When finished, click Save & New to create more custom fields, or click Save if you are done.' and a footer with 'Previous', 'Save & New', 'Save', and 'Cancel' buttons.

The screenshot shows the 'New Custom Object' page in the Object Manager. The left sidebar lists various setup categories. The main area is titled 'Custom Object Definition Edit' with a sub-header 'New Custom Object'. It shows a table with three rows: Label: Lease Agreement, Example: Account; Plural Label: Lease Agreements, Example: Accounts; and Starts with vowel sound: (unchecked). Below the table, it says 'The Object Name is used when referencing the object via the API.' and shows 'Object Name: Lease_Agreement_c' with 'Example: Account'. There's a 'Description' text area and a 'Context Sensitive Help Setting' section with radio buttons for 'Open the standard Salesforce.com Help & Training window' (selected) and 'Open a window using a Visualforce page'. A 'Content Name' dropdown is set to 'None...'. At the bottom, there's a 'Enter Record Name Label and Format' section with a note about record names appearing in various places, a 'Record Name' field with 'Lease Agreement Name' and 'Example: Account Name', and a 'Data Type' dropdown set to 'Auto Number' with a warning about high volume inserts via API. A 'Next' button is visible at the bottom right.

The screenshot shows the 'New Custom Object Tab' page in the Tabs section of the Setup interface. The left sidebar lists various setup categories. The main area is titled 'Step 1. Enter the Details' with a sub-header 'New Custom Object Tab'. It shows a table with three rows: 'Select an existing custom object or create a new custom object now' (Object: Lease Agreement, Tab Style: Form), and '(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.' with a 'Splash Page Custom Link' dropdown set to 'None...'. Below the table, there's a 'Enter a short description' text area and a 'Description' text area. At the bottom, there's a 'Next' button.

Setup Home | Imported | My Camu | Agoda | McAfee Security | Telegram | dramacool - Search | HiAnime Free Anim... | goodcv.com - Search | github - Search | New tab | Other favorites

SETUP Tabs

New Custom Object Tab

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	Default On
Analytics Cloud Security User	Default On
Anypoint Integration	Default On
Authenticated Website	Default On
B2B Reordering Portal Buyer Profile	Default On
Contract Manager	Default On
Cross Org Data Proxy User	Default On
Custom Marketing Profile	Default On
Custom: Sales Profile	Default On
Custom: Support Profile	Default On
Customer Community Login User	Default On
Customer Community Plus Login User	Default On
Customer Community Plus User	Default On

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)	<input checked="" type="checkbox"/>
Sales (standard_Sales)	<input checked="" type="checkbox"/>
Service (standard_Service)	<input checked="" type="checkbox"/>
Marketing CRM Classic (standard_Marketing)	<input checked="" type="checkbox"/>
Sample Console (standard_ServiceConsole)	<input checked="" type="checkbox"/>
High Volume Customer Portal User	<input checked="" type="checkbox"/>
Authenticated Website User	<input checked="" type="checkbox"/>
App Launcher (standard_AppLauncher)	<input checked="" type="checkbox"/>
Community (standard_Community)	<input checked="" type="checkbox"/>
Site.com (standard_Sites)	<input checked="" type="checkbox"/>
Salesforce Chatter (standard_Chatter)	<input checked="" type="checkbox"/>
Content (standard_Content)	<input checked="" type="checkbox"/>
Analytics Studio (standard_Insights)	<input checked="" type="checkbox"/>
Sales Console (standard_LightningSalesConsole)	<input checked="" type="checkbox"/>
Service Console (standard_LightningService)	<input checked="" type="checkbox"/>
Sales (standard_LightningSales)	<input checked="" type="checkbox"/>
Lightning Usage App (standard_LightningInstrumentation)	<input checked="" type="checkbox"/>
Digital Experiences (standard_SalesforceCMS)	<input checked="" type="checkbox"/>

SETUP > OBJECT MANAGER Lease Agreement

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

Description	
API Name	Lease_Agreement_C_C
Custom	<input checked="" type="checkbox"/>
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	

<https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lq0000002EqIB/Details/view>

Screenshot of the Salesforce Setup interface showing the Object Manager for Lease Agreement.

Fields & Relationships

Fields & Relationships section details:

- 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
- Conditional Field Formatted

Fields & Relationships table:

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)		✓

Screenshot of the Salesforce Setup interface showing the Object Manager for Lease Agreement.

Fields & Relationships

Fields & Relationships section details:

- 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
- Conditional Field Formatted

Fields & Relationships dropdown menu expanded:

- None Selected
- 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

Screenshot of the Salesforce Setup interface showing the Object Manager for Lease Agreement.

Fields & Relationships

Fields & Relationships section details:

- Page Layouts
- Lightning Record Pages
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- Record Types
- Related Lookup Filters
- Restriction Rules
- Scoping Rules
- Object Access
- Triggers
- Flow Triggers
- Validation Rules
- Conditional Field Formatted

New Custom Field

Step 2. Enter the details

Form fields:

- Field Label: Start Date
- Field Name: Start Date
- Description: (empty)
- Help Text: (empty)
- 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

Help text for Default Value:

Use formula syntax: Enclose text and picklist value API names in double quotes ("The_Text") include numbers without quotes (123), and enclose ranges as per below: (123,124) and express ranges in the standard formula language. To reference a field from a Custom Metadata Type record use {CustomMetadata_Type__c.name} {CustomMetadata_Type__c.name} {CustomMetadata_Type__c.name} {CustomMetadata_Type__c.name} {CustomMetadata_Type__c.name}

Lease Agreement

Lease Agreement New Custom Field

Step 3. Establish field-level security

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.

	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Einstein Agent User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Force.com - App Subscription User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Force.com - Free User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Gold Partner User	<input type="checkbox"/>	<input type="checkbox"/>

Step 3 of 4

Previous Next Cancel

Lease Agreement

Lease Agreement New Custom Field

Step 4. Add to page layouts

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.

Step 4 of 4

Previous Save & New Save Cancel

Lease Agreement | Salesforce

Lease Agreement

Fields & Relationships

FIELD LABEL FIELD NAME DATA TYPE CONTROLLING FIELD INDEXED

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Lease Agreement Name	Name	Auto Number		
Owner	OwnerId	Lookup(User,Group)		
Start Date	Start_Date_c	Date		

Quick Find New Deleted Fields Field Dependencies Set History Tracking

Setup Home 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 Conditional Field Formatting

Select one of the data types below.

None Selected

A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

Auto Number

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.

Formula

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.

Roll-Up Summary

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.

Lookup 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 the detail record.
- The ownership and sharing of a detail record is determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rolling 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.

Master-Detail Relationship

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

External Lookup Relationship

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.

Date

Allows users to enter a date and time, or pick a date from a pop-up calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.

Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

Allows users to enter any number. Leading zeros are removed.

Allows users to enter a percentage number, for example, 10% and automatically adds the percent sign to the number.

Allows users to enter any phone number. Automatically formats it as a phone number.

Allows users to select a value from a list you define.

Allows users to select multiple values from a list you define.

Setup Home 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 Conditional Field Formatting

New Custom Field Step 2 of 4

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

Show Formula Editor

Use formula editor. Enclose text and printed value API names in double quotes: ("Name_Label"), include numbers without quotes. To reference a field from another object, use the object name followed by the field name, separated by a period: "Opportunity.StageName". To reference a field from a Custom Metadata type record, use: \$CustomMetadataType__mdRecord\$Name.FieldName__c

Previous Next Cancel

Setup Home 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 Conditional Field Formatting

New Custom Field Step 4 of 4

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.

Previous Save & New Save Cancel

https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000002EgIB/FieldsAndRelationships/view

Setup Home Object Manager Search Setup

Lease Agreement

Fields & Relationships

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/01lgK000002EgIB/FieldsAndRelationships/new

Setup Home Object Manager Search Setup

Lease Agreement

Fields & Relationships

External Lookup Relationship

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.

Create a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Currency

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.

Date

Allows users to enter a date or pick a date from a popup calendar.

DateTime

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 DateTime field.

Email

Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

Geolocation

Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

Number

Allows users to enter any number. Leading zeros are removed.

Percent

Allows users to enter a percentage number, for example, "10" and automatically adds the percent sign to the number.

Phone

Allows users to enter any phone number. Automatically formats it as a phone number.

Picklist

Allows users to select a value from a list you define.

Picklist (Multi-Select)

Allows users to select multiple values from a list you define.

Text

Allows users to enter any combination of letters and numbers.

Text Area

Allows users to enter up to 256 characters on separate lines.

Text Area (Long)

Allows users to enter up to 131,072 characters on separate lines.

Text Area (Rich)

Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

Text (Encrypted)

Allows users to enter any combination of letters and numbers and store them in encrypted form.

Time

Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50:600" are all valid times for this field.

URL

Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

Next Cancel

https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000002EgIB/FieldsAndRelationships/new

Setup Home Object Manager Search Setup

Lease Agreement

Fields & Relationships

External Lookup Relationship

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.

Create a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Currency

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.

Date

Allows users to enter a date or pick a date from a popup calendar.

DateTime

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 DateTime field.

Email

Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

Geolocation

Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

Number

Allows users to enter any number. Leading zeros are removed.

Percent

Allows users to enter a percentage number, for example, "10" and automatically adds the percent sign to the number.

Phone

Allows users to enter any phone number. Automatically formats it as a phone number.

Picklist

Allows users to select a value from a list you define.

Picklist (Multi-Select)

Allows users to select multiple values from a list you define.

Text

Allows users to enter any combination of letters and numbers.

Text Area

Allows users to enter up to 256 characters on separate lines.

Text Area (Long)

Allows users to enter up to 131,072 characters on separate lines.

Text Area (Rich)

Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

Text (Encrypted)

Allows users to enter any combination of letters and numbers and store them in encrypted form.

Time

Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50:600" are all valid times for this field.

URL

Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

Next Cancel

<https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000002EgJB/FieldsAndRelationships/new>

The screenshot shows the 'Lease Agreement New Custom Field' setup page. The 'Field Label' is set to 'Monthly Rent'. The 'Length' is 18 and 'Decimal Places' is 0. The 'Field Name' is 'Monthly_Rent'. Under 'Description', there is a help text input field. The 'Required' checkbox is unchecked. The 'Auto add to custom report type' checkbox is checked. The 'Default Value' section contains a formula editor with the formula: `Use formula editor: Enclose text and decimal value in double quotes ('123.45') include numbers without quotes (123.45) or use a variable like <code>{!MyField}</code>. Use variables like <code>{!Record}</code> or <code>{!RecordName}</code> to reference a field from a Custom Metadata type record use <code>[CustomMetadataType__c]_RecordName.FieldName</code>`. Buttons at the bottom include 'Previous', 'Next', and 'Cancel'.

<https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000002EgJB/FieldsAndRelationships/new>

The screenshot shows the 'Lease Agreement New Custom Field' setup page. The 'Field Label' is 'Monthly Rent', 'Data Type' is 'Currency', and 'Field Name' is 'Monthly_Rent'. Under 'Description', there is a help text input field. The 'Field-Level Security for Profile' section lists various user profiles with checkboxes for 'Visible' and 'Read-Only'. Profiles listed include: 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, and Gold Partner User. Buttons at the bottom include 'Previous', 'Next', and 'Cancel'.

<https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000002EgJB/FieldsAndRelationships/new>

The screenshot shows the 'Lease Agreement New Custom Field' setup page. The 'Field Label' is 'Monthly Rent', 'Data Type' is 'Currency', and 'Field Name' is 'Monthly_Rent'. Under 'Description', there is a help text input field. The 'Select the page layouts that should include this field' section has two checkboxes: 'Add Field' and 'Page Layout Name'. The 'Page Layout Name' checkbox is checked and points to 'Lease Agreement Layout'. A note says: 'When finished, click Save & New to create more custom fields, or click Save if you are done.' Buttons at the bottom include 'Previous', 'Save & New', 'Save', and 'Cancel'.

https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000002EgJB/FieldsAndRelationships/view

Setup Home Object Manager Search Setup

Lease Agreement

Fields & Relationships

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		

https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000002EgJB/FieldsAndRelationships/new

Setup Home Object Manager Search Setup

Lease Agreement

Fields & Relationships

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 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.
- External Lookup Relationship Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

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 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.

External Lookup Relationship

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000002EgJB/FieldsAndRelationships/new

Setup Home Object Manager Search Setup

Lease Agreement

Fields & Relationships

New Relationship

Step 2. Choose the related object

Property

Select the other object to which this object is related.

Related To:

Help for this Page

https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01gK000002EgjB/FieldsAndRelationships/new

Setup Home Object Manager

Lease Agreement

New Relationship

Step 3. Enter the label and name for the lookup field

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
 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
Optional: create a filter to limit the records available to users in the lookup field. [Tell me more!](#)
[Show Filter Settings](#)

Previous Next Cancel

https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01gK000002EgjB/FieldsAndRelationships/new

Setup Home Object Manager

Lease Agreement

Fields & Relationships

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	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Einstein Agent User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Force.com - App Subscription User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Force.com - Free User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Gold Partner User	<input type="checkbox"/>	<input type="checkbox"/>
Identity User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Marketing User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Minimum Access - API Only Integrations	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Minimum Access - Salesforce	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Previous Next Cancel

Lease Agreement

New Relationship

[Help for this Page](#)

Step 6. Add custom related lists

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

Previous Save & New Save Cancel

Lease Agreement

Step 1. Choose the field type

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 pop-up list. The other object is the source of the values in the list.
 - 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 lookup summary fields on the master record to summarize the detail records.
- Master-Detail Relationship A master-detail relationship is required on all detail records.
- 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 pop-up calendar.
- Date/Time Allows users to enter a date and time, or pick a date from a pop-up calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
- Email Allows users to enter an email address which is validated to ensure proper format. If this field is selected for a contact or lead, users can choose the address when clicking Send an Email. Note that custom validation rules can't be applied to email fields.

Step 1 [Next](#) [Cancel](#)

Lease Agreement

New Relationship

Step 2. Choose the related object

Select the other object to which this object is related.

Related To:

Step 2 [Previous](#) [Next](#) [Cancel](#)

Lease Agreement

New Relationship

Step 3. Enter the label and name for the lookup field

Field Label:

Field Name:

Description:

Help Text:

Child Relationship Name:

Required: Always require a value in this field in order to save a record
 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.

Step 3 of 6 [Previous](#) [Next](#) [Cancel](#)

Lookup Filter

Optional, create a filter to limit the records available to users in the lookup field. [Tell me more!](#)

[Show Filter Settings](#)

https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000002EgjB/FieldsAndRelationships/new

Setup Home 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 Conditional Field Formatters

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.

	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
AnyPoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Einstein Agent User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Force.com - App Subscription User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Force.com - Free User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Gold Partner User	<input type="checkbox"/>	<input type="checkbox"/>
Identity User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Marketing User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Minimum Access - API Only Integrations	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Minimum Access - Salesforce	<input checked="" type="checkbox"/>	<input type="checkbox"/>

https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000002EgjB/FieldsAndRelationships/new

Setup Home 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

New Relationship Step 5: Add reference field to Page Layouts Help for this Page

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

Previous Next Cancel

https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000002EgjB/FieldsAndRelationships/new

Setup Home 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

New Relationship Step 6: Add custom related lists Help for this Page

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

Previous Save & New Save Cancel

Lease Agreement

Fields & Relationships

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)		✓

New Custom Object

Custom Object Definition Edit

Custom Object 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.

SETUP

Tabs

New Custom Object Tab

Step 1. Enter the Details

Choose the custom object for this new custom tab. Fill in other details.

New Custom Object Tab

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/01lgK000002Ejgr/Details/view

Object Manager

Payment

Details

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

https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000002Ejgr/FieldsAndRelationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		✓
Payment Name	Name	Auto Number		✓

https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000002Ejgr/Relationships

New Relationship

Step 2. Choose the related object

Select the other object to which this object is related

Related To: --None--

Setup > Object Manager > Payment > Fields & Relationships > New Relationship

Step 4 of 6: Establish field-level security for reference field

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.

	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
AnyPoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Einstein Agent User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Force.com - App Subscription User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Force.com - Free User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Gold Partner User	<input type="checkbox"/>	<input type="checkbox"/>

Setup > Object Manager > Payment > Fields & Relationships > New Relationship

Step 6 of 6: Add custom related lists

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. This 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.
Add Related List: Page Layout Name: Lease Agreement Layout
Append related list to users' existing personal customizations

Setup > Object Manager > Payment > Fields & Relationships

Fields & Relationships

FIELD LABEL FIELD NAME DATA TYPE CONTROLLING FIELD INDEXED

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Lease Agreement	Lease_Agreement_c	Lookup(Lease Agreement)		
Owner	OwnerId	Lookup(User,Group)		
Payment Name	Name	Auto Number		

SETUP > OBJECT MANAGER

Payment

Fields & Relationships

- 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) 1
- Time
- URL

The relationship field allows users to click on a lookup icon to select a value from a pop-up list. The master object is the source of the values in the list. Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

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 pop-up calendar.

Allows users to enter a date and time, or pick a date from a pop-up calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.

Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

Allows users to enter any number. Leading zeros are removed.

Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.

Allows users to enter any phone number. Automatically formats it as a phone number.

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.

Allows users to enter up to 255 characters on separate lines.

Allows users to enter up to 131,072 characters on separate lines.

Allows users to enter formatted text, add images, and links. Up to 131,072 characters on separate lines.

Allows users to enter any combination of letters and numbers and store them in encrypted form.

Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50:600" are all valid times for this field.

Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

Next | **Cancel**

SETUP > OBJECT MANAGER

Payment

New Custom Field

Step 2. Enter the details

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 "12345678.99".

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 **Amount**

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 1

Default Value **Show Formula Editor**

Like formula editor. Enclose text and default value API names in double quotes ("Text") or include numbers without quotes (123). To reference a field from another object, use the standard Name/Type (e.g., Account.Name) or the custom Name/Type (e.g., Account__c.Name). To reference a field from a Custom Metadata type record use {CustomMetadataType__c.RecordName.FieldName__c}

Help for this Page ?

Step 2 of 4

Previous | **Next** | **Cancel**

<https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000002Ejgr/FieldsAndRelationships>

SETUP > OBJECT MANAGER

Payment

New Custom Field

Step 4. Add to page layouts

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.

Help for this Page ?

Step 4 of 4

Previous | **Save & New** | **Save** | **Cancel**

Payment

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Currency(18, 0)		
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		

group them together into one custom app

Setup Home

Most Recently Used

NAME	TYPE	OBJECT
Amount	Custom Field Definition	Payment
Lease Agreement	Custom Tab Definition	Payment
Payments	Custom Object Definition	Payment
Payment	Custom Object Definition	Lease Agreement
Tenant	Custom Field Definition	

Lightning Experience App Manager

App Name	Developer Name	Description	Last Modified	Ap...	Vl...
All Tabs	AllTabSet	Build CRM Analytics dashboards and apps	7/9/2025, 10:08 PM	Classic	
Analytics Studio	Insights	Build CRM Analytics dashboards and apps	7/9/2025, 10:08 PM	Classic	
App Launcher	AppLauncher	App Launcher tabs	7/9/2025, 10:08 PM	Classic	
Approvals	Approvals	Manage approvals and approval flows	7/9/2025, 10:08 PM	Lightning	
Automation	FlowApp	Automate business processes and repetitive tasks.	7/9/2025, 10:17 PM	Lightning	
Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	7/9/2025, 10:08 PM	Lightning	
Community	Community	Salesforce CRM Communities	7/9/2025, 10:08 PM	Classic	
Content	Content	Salesforce CRM Content	7/9/2025, 10:08 PM	Lightning	
Data Cloud	Audience360	Build a thorough and complete understanding of your customers.	7/9/2025, 10:08 PM	Lightning	
Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	7/9/2025, 10:08 PM	Lightning	
Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	7/9/2025, 10:08 PM	Lightning	
How_We_Roll_Maintenance	How_We_Roll_Maintenan...		8/1/2025, 12:37 AM	Lightning	
Lightning_Usage_App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	7/9/2025, 10:08 PM	Lightning	
Marketing_CRM_Classic	Marketing	Track sales and marketing efforts with CRM objects.	7/9/2025, 10:08 PM	Classic	
My_Service_Journey	MSIApp	Discover new customer service capabilities.	7/9/2025, 10:08 PM	Lightning	
Platform	Platform	The fundamental Lightning Platform	7/9/2025, 10:08 PM	Classic	
Queue Management	QueueManagement	Create and manage queues for your business.	7/9/2025, 10:08 PM	Lightning	

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 <input type="text" value="Lease Management"/>	Image <input type="file"/> Primary Color Hex Value <input type="text" value="#007002"/>
* Developer Name <input type="text" value="Lease_Management"/>	Upload
Description <input type="text" value="App to manage properties, tenants, leases, and payments."/>	Org Theme Options <input type="checkbox"/> Use the app's image and color instead of the org's custom theme
App Launcher Preview	
 Lease Management App to manage properties, tenants, leases, and payments.	
<small>7/9/2025, 10:08 PM Lightning ✓</small>	
<small>7/9/2025, 10:08 PM Classic</small>	
<small>7/9/2025, 10:08 PM Lightning ✓</small>	
<small>7/9/2025, 10:08 PM Classic</small>	

Next

New Lightning App

App Options

Navigation and Form Factor	Setup and Personalization
* Navigation Style <input checked="" type="radio"/> Standard navigation <input type="radio"/> Console navigation	Setup Experience <input checked="" type="radio"/> Setup (full set of Setup options) <input type="radio"/> Service Setup <input type="radio"/> Data Cloud Setup
* Supported Form Factors <input checked="" type="radio"/> Desktop and phone <input type="radio"/> Desktop <input type="radio"/> Phone	App Personalization Settings <input type="checkbox"/> Disable end user personalization of nav items in this app <input type="checkbox"/> Disable temporary tabs for items outside of this app <input type="checkbox"/> Use Omni-Channel sidebar

Back Next

New Lightning App

Available Items	Selected Items
<input type="button" value="Create"/> <input type="button" value="Delete"/> <ul style="list-style-type: none"> Partner Unsold Inventory Ledgers Party Consent Paused Flows Payment Authorization Adjustments Payment Authorizations Payment Gateway Logs Payment Gateways Payment Line Invoices Payments 	<input type="button" value="Up"/> <input type="button" value="Down"/> <ul style="list-style-type: none"> Properties Tenants Lease Agreements Payments

Back Next

New Lightning App

Available Profiles

- Minimum Access - Salesforce
- Partner App Subscription User
- Partner Community Login User
- Partner Community User
- Read Only
- Salesforce API Only System Integrations
- Silver Partner User
- Solution Manager
- Standard Platform User
- Standard User

Selected Profiles

- System Administrator

Save & Finish

15 My Service Journey	MSIApp	Discover new customer service capabilities.	7/9/2025, 10:08 PM	Lightning
16 Platform	Platform	The fundamental Lightning Platform	7/9/2025, 10:08 PM	Classic
17 Queue Management	QueueManagement	Create and manage queues for your business.	7/9/2025, 10:08 PM	Lightning
18 Sales	Sales	The world's most popular sales force automation (SFA) solution	7/9/2025, 10:08 PM	Classic

Lightning Experience App Manager

29 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type, App Type

App Name	Developer Name	Description	Last Modified Date	App Type	Visible in ...
1 All Tabs	AllTabSet		7/9/2025, 10:08 PM	Classic	
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	7/9/2025, 10:08 PM	Classic	
3 App Launcher	AppLauncher	App Launcher tabs	7/9/2025, 10:08 PM	Classic	
4 Approvals	Approvals	Manage approvals and approval flows	7/9/2025, 10:08 PM	Lightning	
5 Automation	FlowsApp	Automate business processes and repetitive tasks.	7/9/2025, 10:17 PM	Lightning	
6 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	7/9/2025, 10:08 PM	Lightning	
7 Community	Community	Salesforce CRM Communities	7/9/2025, 10:08 PM	Classic	
8 Content	Content	Salesforce CRM Content	7/9/2025, 10:08 PM	Classic	
9 Data Cloud	Audience360	Build a thorough and complete understanding of your customers.	7/9/2025, 10:08 PM	Lightning	
10 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	7/9/2025, 10:08 PM	Lightning	
11 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	7/9/2025, 10:08 PM	Lightning	
12 How We Roll Maintenance	How_We_Roll_Maintenance		8/1/2025, 12:37 AM	Lightning	
13 Lease Management	Lease_Management	App to manage properties, tenants, leases, and payments.	9/14/2025, 2:51 AM	Lightning	
14 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	7/9/2025, 10:08 PM	Lightning	
15 Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	7/9/2025, 10:08 PM	Classic	
16 My Service Journey	MSIApp	Discover new customer service capabilities.	7/9/2025, 10:08 PM	Lightning	
17 Platform	Platform	The fundamental Lightning Platform	7/9/2025, 10:08 PM	Classic	
18 Queue Management	QueueManagement	Create and manage queues for your business.	7/9/2025, 10:08 PM	Lightning	

ready to add data.

Recently Viewed

Nothing to see here.

There's nothing in your list yet. Try adding a new record.

Lease Management Properties Tenants

Recently Viewed ▾

0 items • Updated 7 minutes ago

New Import Change Owner Assign Label

Search this list...

New Property

Information

* = Required Information

Property Name: Sunrise Apartments Owner: Asma Ahmed.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

Related Details

Property Name: Sunrise Apartments Owner: Asma Ahmed.A

Created By: Asma Ahmed.A, 9/14/2025, 3:20 AM Last Modified By: Asma Ahmed.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

Related Details

Property Name: Sunrise Apartments Owner: Asma Ahmed.A

Created By: Asma Ahmed.A, 9/14/2025, 3:20 AM

New Tenant

Information

* = Required Information

Tenant Name: John Doe Owner: Asma Ahmed.A

Phone: 555-123-4567

Email: john.doe@email.com

Cancel Save & New Save

Overdue

No activities to show. Get started by sending an email, scheduling a task, and more.

Past activity. Past meetings and tasks marked as done show up here.

https://orgfarm-30278bb6d61-dev-ed.develop.lightning.force.com/lightning/r/a07gK00000DDN9mQAH/view

Lease Management Properties Tenants

Tenant John Doe

Related Details

Tenant Name John Doe	Owner Asma Ahamed,A.
Phone 555-123-4567	
Email johndoe@email.com	
Created By Asma Ahamed,A.	Last Modified By Asma Ahamed,A. 9/14/2025, 3:27 AM

Activity

Filters: All time • All activities • All types

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-30278bb6d61-dev-ed.develop.lightning.force.com/lightning/r/Tenant_c/a07gK00000DDN9mQAH/view

Lease Management Properties Tenants

App Launcher Q lead

Apps Lease Management

Items

Lease Agreements

View All

555-123-4567	Owner Asma Ahamed,A.
Email johndoe@email.com	
Created By Asma Ahamed,A.	Last Modified By Asma Ahamed,A. 9/14/2025, 3:27 AM

Activity

Filters: All time • All activities • All types

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-30278bb6d61-dev-ed.develop.lightning.force.com/lightning/o/Lease_Agreement_c_c/home

Lease Management Properties Tenants Lease Agreements

Lease Agreements Recently Viewed

0 items • Updated a minute ago

New Import Change Owner Assign Label



Nothing to see here

There's nothing in your list yet. Try adding a new record.

New Lease Agreement

Information

Lease Agreement Name: L-0001

Start Date: 9/14/2025

End Date: 9/15/2026

Monthly Rent: \$1,200

Property: Sunrise Apartments

Tenant: John Doe

Owner: Asma Ahamed.A

Cancel | Save & New | Save

Lease Agreement L-0001

Related Details

Lease Agreement Name: L-0001

Start Date: 9/14/2025

End Date: 9/15/2026

Monthly Rent: \$1,200

Property: Sunrise Apartments

Tenant: John Doe

Created By: Asma Ahamed.A, 9/14/2025, 4:29 AM

Last Modified By: Asma Ahamed.A, 9/14/2025, 4:29 AM

Tenant achu

Related Details

Tenant Name: achu

Phone: 123456789

Email: bscids0113@gmail.com

Created By: Asma Ahamed.A, 9/14/2025, 4:34 AM

Last Modified By: Asma Ahamed.A, 9/14/2025, 4:34 AM

Activity

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.

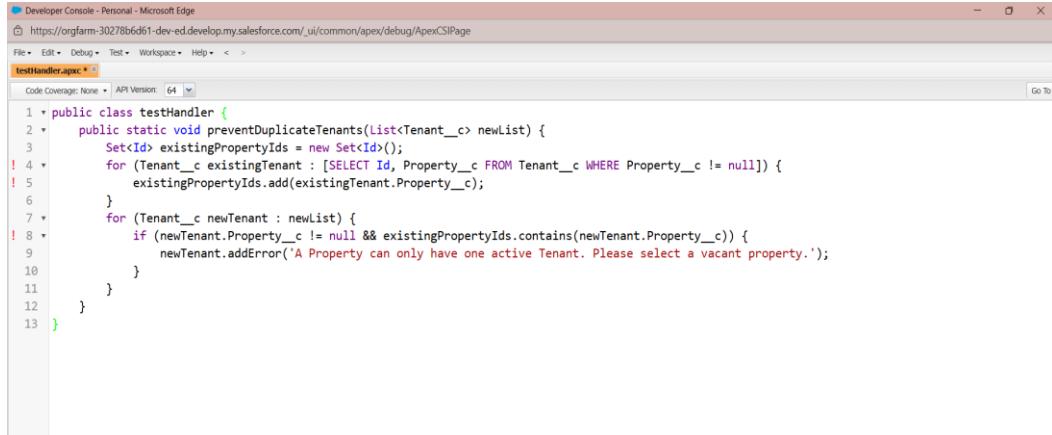
"achu" was created, which means the trigger **did not run**. This happens because the code might be missing or has a small mistake

Create the Class (The Brain):

The screenshot shows the Salesforce Lightning Experience. A sidebar on the left displays the 'Lease Management' app under 'Tenants'. The main content area shows a 'Tenant' record for 'achu'. The 'Details' tab is selected, displaying fields such as Tenant Name (achu), Owner (Asma Ahmed.A), Phone (123456789), Email (bscaids0113@gmail.com), Created By (Asma Ahmed.A), and Last Modified By (Asma Ahmed.A). To the right, a 'Setup Menu' is open, showing options like 'Setup', 'Data Cloud Setup', 'Service Setup', and 'Salesforce Go'. A 'Developer Console' button is also visible. Below the setup menu, an 'Activity' section indicates 'No activities to show.' and 'Upcoming & Overdue'.

The screenshot shows the Salesforce Developer Console in Microsoft Edge. The 'New' menu is open, and 'Apex Class' is selected. Other options in the menu include Open, Open Resource, Open Lightning Resources, Open Log, Open Raw Log, Download Log, Save, Save All, Delete, Close, and Close All. The developer console interface includes tabs for File, Edit, Debug, Test, Workspace, and Help.

The screenshot shows the Salesforce Developer Console in Microsoft Edge. A 'New Apex class' dialog box is open in the foreground. It prompts the user to 'Please enter a name for your new Apex class' and contains a text input field with the value 'testHandler'. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

A screenshot of the Microsoft Edge browser displaying the Salesforce Developer Console. The URL is https://orgfarm-30278b6d61-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage. The tab title is 'testHandler.apex'. The code editor shows the following Apex class:

```
1 * public class testHandler {  
2     public static void preventDuplicateTenants(List<Tenant__c> newList) {  
3         Set<Id> existingPropertyIds = new Set<Id>();  
4         for (Tenant__c existingTenant : [SELECT Id, Property__c FROM Tenant__c WHERE Property__c != null]) {  
5             existingPropertyIds.add(existingTenant.Property__c);  
6         }  
7         for (Tenant__c newTenant : newList) {  
8             if (newTenant.Property__c != null && existingPropertyIds.contains(newTenant.Property__c)) {  
9                 newTenantaddError('A Property can only have one active Tenant. Please select a vacant property.');//  
10            }  
11        }  
12    }  
13 }
```

```
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)) {  
  
                newTenantaddError('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

The screenshot shows the Salesforce Apex Editor interface. The top navigation bar includes links for File, Edit, Debug, Test, Workspace, Help, and tabs for Run Test and Go To. The main editor area displays the following Apex code:

```
32     }
33
34     @isTest
35     static void testAllowValidTenant() {
36         // This test ensures valid tenants (on a vacant property) can still be created.
37         Property__c vacantProperty = new Property__c(Name = 'Vacant Property');
38         insert vacantProperty;
39
40         Tenant__c validTenant = new Tenant__c(
41             Name = 'Valid Tenant',
42             Property__c = vacantProperty.Id,
43             Active__c = true
44         );
45
46         Test.startTest();
47         Database.SaveResult result = Database.insert(validTenant, false);
48         Test.stopTest();
49
50         System.assert(result.isSuccess(), 'The valid tenant should have been inserted successfully');
51     }
52 }
```

Below the code editor is a tab bar with options: Logs, Tests, Checkpoints, Query Editor, View State, Progress, and Problems. The 'Logs' tab is currently selected. At the bottom of the interface is a detailed log table with columns for User, Application, Operation, Time, Status, Read, and Size.

```
@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;

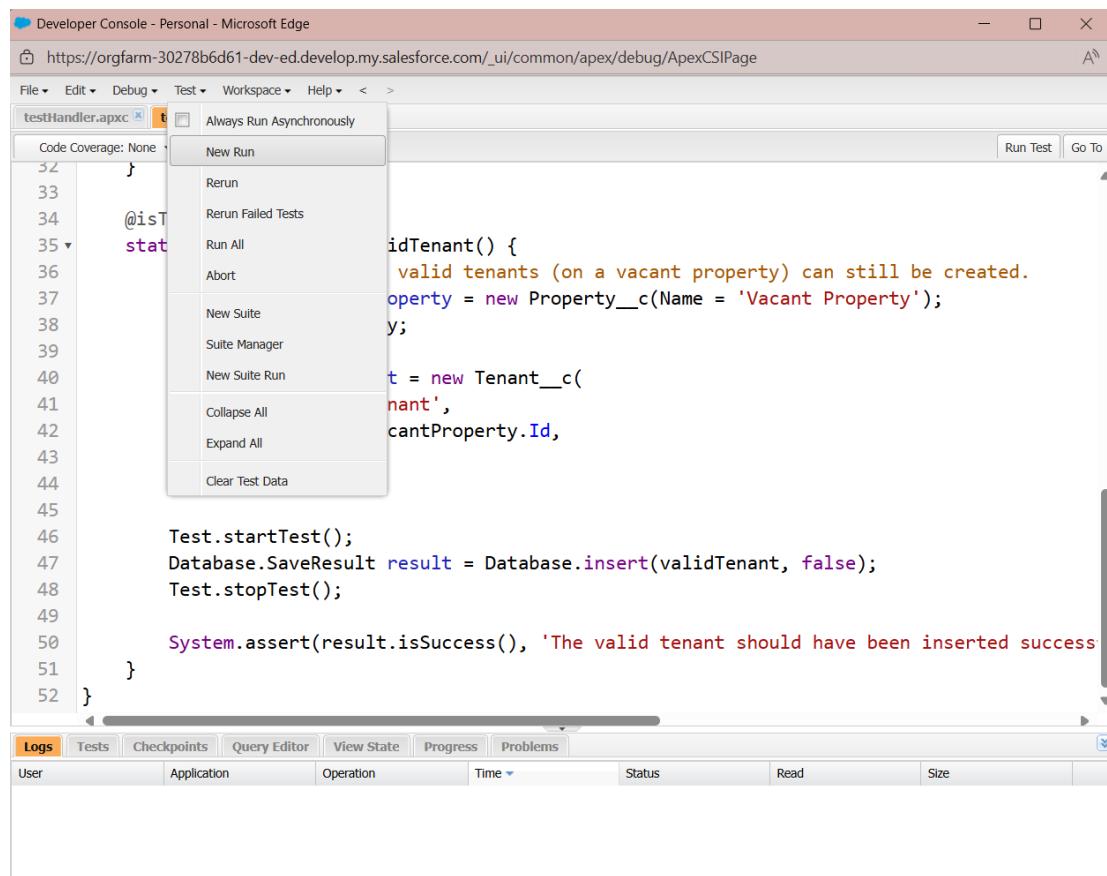
    Tenant__c validTenant = new Tenant__c(
        Name = 'Valid Tenant',
        Property__c = vacantProperty.Id,
        Active__c = true
    );

    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

```

32 }
33
34     @isTest
35     static void testAllowValidTenant() {
36         // This test ensures valid tenants (on a vacant property) can still be created
37         Property__c insert vacantProperty;
38         Tenant__c validTenant = new Tenant__c(
39             Name = 'Valid Tenant',
40             Property__c = vacantProperty.Id,
41             Active__c = true
42         );
43
44         Test.startTest();
45         Database.SaveResult result = Test.stopTest();
46
47         System.assert(result.isSuccess(), 'The valid tenant should have been inserted successfully');
48
49     }
50 }
51
52 }
```

Select Tests

Test Classes	testHandler_Test Tests	Selected Tests
Name	Name	<input checked="" type="checkbox"/>
CreateDefaultDataTest	testAllowValidTenant	<input checked="" type="checkbox"/>
WarehouseCalloutServiceTest	testPreventDuplicateTe...	<input checked="" type="checkbox"/>
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-30278b6d1-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

```

32 }
33
34     @isTest
35     static void testAllowValidTenant() {
36         // This test ensures valid tenants (on a vacant property) can still be created.
37         Property__c vacantProperty = new Property__c(Name = 'Vacant Property');
38         insert vacantProperty;
39
40         Tenant__c validTenant = new Tenant__c(
41             Name = 'Valid Tenant',
42             Property__c = vacantProperty.Id,
43             Active__c = true
44         );
45
46         Test.startTest();
47         Database.SaveResult result = Test.stopTest();
48
49         System.assert(result.isSuccess(), 'The valid tenant should have been inserted successfully');
50
51     }
52 }
```

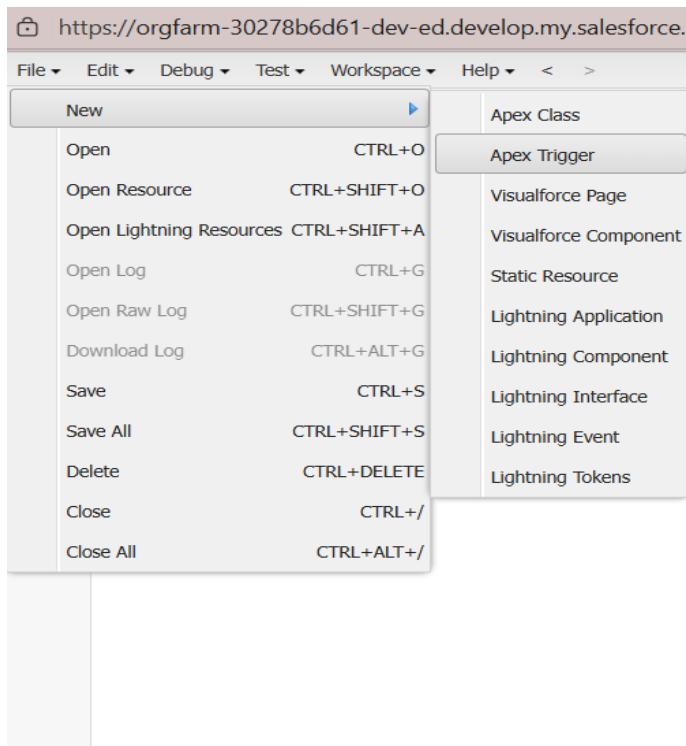
Running tests synchronously... Success

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.

A screenshot of the Salesforce Developer Console code editor. The title bar says 'Developer Console - Personal - Microsoft Edge' and the URL is https://orgfarm-30278b6d61-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage. The editor window shows a file named 'TenantTrigger.apxt'. The code is:

```
1 trigger TenantTrigger on Tenant__c (before insert, before update) {  
2     testHandler.preventDuplicateTenants(Trigger.new);  
3 }
```

The code coverage dropdown shows 'None' and the API version dropdown shows '64'.

```
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 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

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

SETUP > OBJECT MANAGER

Leave Request

Details	Details
Fields & Relationships	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Page Layouts	Description
Lightning Record Pages	API Name
Buttons, Links, and Actions	Leave_Request__c
Compact Layouts	Custom
Field Sets	✓
Object Limits	Singular Label
Record Types	Leave Request
Related Lookup Filters	Plural Label
Restriction Rules	Leave Requests
Scoping Rules	Enable Reports
Object Access	Track Activities
Triggers	Track Field History
Flow Triggers	Deployment Status
	Deployed
	Help Settings
	Standard salesforce.com Help Window

Setup Home Object Manager

Leave Request

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

New Custom Field

Step 2. Enter the details Step 2 of 4

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

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

New Custom Field

Step 4. Add to page layouts Step 4 of 4

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.

<input checked="" type="checkbox"/> Add Field	Page Layout Name
<input checked="" type="checkbox"/>	Leave Request Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

SETUP > OBJECT MANAGER

Leave Request

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

New Custom Field

Step 4. Add to page layouts Step 4 of 4

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.

<input checked="" type="checkbox"/> Add Field	Page Layout Name
<input checked="" type="checkbox"/>	Leave Request Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

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

FIELD LABEL		FIELD NAME	DATA TYPE	CONTROLLING FILED	INDEX
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		

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

Help for this Page ?

Step 2. Enter the details Step 2 of 4[Previous](#) [Next](#) [Cancel](#)Field Label Field Name Description Help Text Required Always require a value in this field in order to save a recordAuto add Add this field to existing custom report types that contain this entity [i](#)**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

New Custom Field

Help for this Page ?

Step 2. Enter the details Step 2 of 4[Previous](#) [Next](#) [Cancel](#)Field Label Field Name Description Help Text Required Always require a value in this field in order to save a recordAuto add Add this field to existing custom report types that contain this entity [i](#)

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
 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](#)**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
 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](#)

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](#)**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
- Triggers

 Quick Find [New](#) [Deleted Fields](#) [Field Dependencies](#) [Set HI](#)

Systems, Sorted by Field Label

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

**App Launcher**
 email
Apps

No results

Items[Email Templates](#)[List Emails](#)[View All](#)

DKIM Keys

SETUP

Home

Create ▾

Up

Cloud

Select, prepare, harmonize, unify, and analyze data to get a 360-degree view of your customers.



Email template

The screenshot shows the 'Lease Management' application interface. The top navigation bar includes links for Google, Imported, My Camu, Agoda, McAfee Security, Telegram, and Other favorites. Below the navigation is a toolbar with icons for cloud storage, search, and various system functions. The main header displays 'Lease Management' and the current page as '* Email Templates'. A sub-header 'Email Templates All Templates' is visible. On the right, there is a button for 'New Email Template'. The main content area shows a table with columns for Email Template, Description, Email Template..., Last Modified..., and Last Modified.... The table currently has no items.

A modal dialog box titled 'New Email Template' is open over the main application window. It contains two tabs: 'Information' and 'Message Content'. The 'Information' tab requires the 'Email Template Name' (set to 'Leave Request Approval Needed') and 'Related Entity Type' (set to 'None'). The 'Description' field also contains 'Leave Request Approval Needed'. The 'Message Content' tab shows the subject 'Leave Request Approval for {{Leave_Request__c}}' and the message body: 'Dear Manager,
{{Leave_Request__c.Requested_By__c}} has submitted a leave request from {{Leave_Request__c.Start_Date__c}} to {{Leave_Request__c.End_Date__c}}.' At the bottom of the dialog are 'Cancel' and 'Save' buttons.

The screenshot shows the details of the 'Leave Request Approval' email template. The 'Details' tab is selected. The 'Information' section includes fields for Email Template Name ('Leave Request Approval'), Description ('Process to approve employee leave requests'), and Related Entity Type ('Private Email Templates'). The 'Message Content' section shows the subject 'Leave Request Approval for {{Leave_Request__c}}' and the message body: 'Dear Manager,
{{RequestedBy}} has submitted a leave request from {{StartDate}} to {{EndDate}}.
Reason: {{Reason}}
Please review and approve.' The 'Additional Information' section at the bottom shows 'Created By' as 'Asma Ahmed.A' and 'Last Modified By' as 'Asma Ahmed.A' with a timestamp of 9/14/2025, 10:02 AM.

Lease Management Properties Tenants Leave Rejected

Email Templates All Templates

3 items • Refresh this list to view the latest data

Email Template Name	Description	Email Templates from Salesforce	Last Modified By ID	Last Modified Date
1 Leave Approved	Your Leave Request has been Approved	Private Email Templates	Asma Ahmed.A	9/14/2025, 10:06 AM
2 Leave Rejected	Your Leave Request has been Rejected	Private Email Templates	Asma Ahmed.A	9/14/2025, 10:09 AM
3 Leave Request Approval	Process to approve employee leave requests	Private Email Templates	Asma Ahmed.A	9/14/2025, 10:02 AM

Setup Home Object Manager

approval

Home

Create

Setup Data Cloud

Watch Video Let's Go

Most Recently Used

New Approval Process Identity Resolutions Help for this Page

Step 1. Enter Name and Description Step 1 of 6

Next Cancel

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

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 assigned approver can edit the record.

--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](#)

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

--None--

Operator

--None--

--None--

--None--

--None--

--None--

--None--

--None--

[Add Filter Logic...](#)

[Previous](#) [Next](#) [Cancel](#)

Output:

The screenshot shows the Salesforce Setup Home page. On the left, there's a sidebar with navigation links like Setup Home, Service Setup Assistant, and Platform Tools. The main area features four cards: Data Cloud, Get Started with Einstein Bots, Mobile Publisher, and Join the Trailblazer Community. Below these is a section titled "Most Recently Used" with a table showing recent items. One item in the table is:

NAME	TYPE	OBJECT
TenantTrigger	Apex Trigger	Tenant

The screenshot shows the Salesforce Lease Management page. At the top, there are tabs for Home, Properties, and Tenants. The main content area is titled "Tenants" and "Recently Viewed". It lists two items: "achu" and "John Doe". There are buttons for New, Import, Change Owner, and Assign Label at the top right. A sticky notes button is visible at the bottom right.

New Tenant

* = Required Information

Information

*Tenant Name	Arish	Owner	Asma Ahamed.A
Phone	987654321		
Email	arishvanth.10@gmail.com		
Property	Sunrise Apartments		
Active	<input checked="" type="checkbox"/>		

Buttons: Cancel, Save & New, Save

Lease Management

Tenants

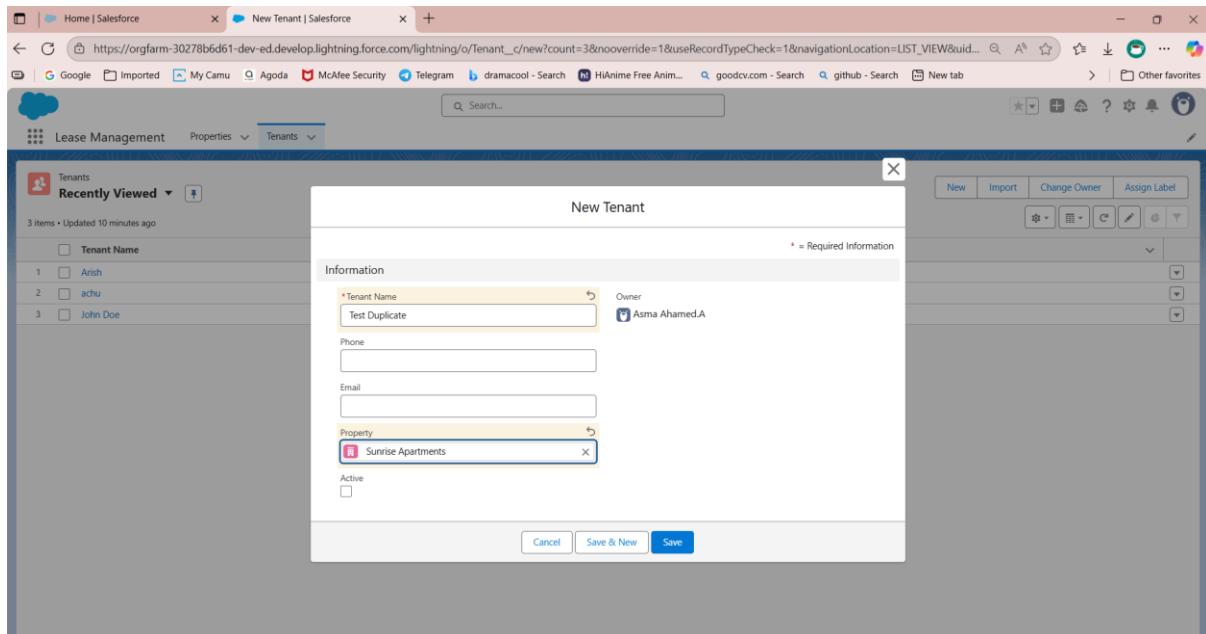
Recently Viewed

	Tenant Name
1	Arish
2	achu
3	John Doe

New Import Change Owner Assign Label

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."



New Tenant

* = Required Information

Information

* Tenant Name

Test Duplicate

Owner



Asma Ahamed.A

Phone

Email

Property

Ø 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.