Lease Management System – Project Executables Document

Platform: Salesforce

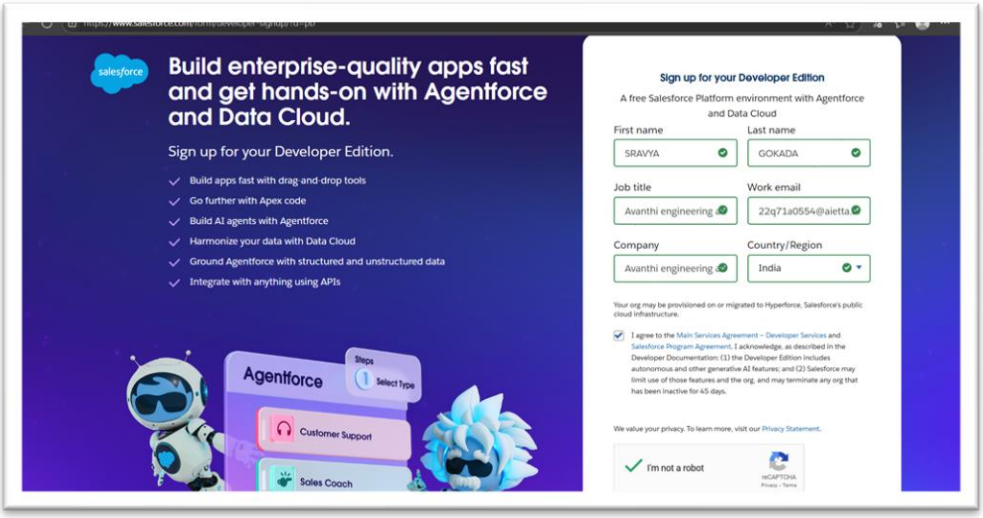
Technology Stack: Salesforce CRM, Apex, Flow Builder, Lightning App Builder, Salesforce Data Model

1. Project Modules/Executables Overview

Module	Description
Lease Creation	Create new lease agreements for tenants
Lease Renewal	Automate lease extension and approval workflow
Payment Tracking	Track due dates, payment history, alerts
Maintenance Requests	Tenants log issues, assign to technician
Document Upload	Upload and store lease documents
Dashboards/Reports	Visualize lease status, rent collections

2. Login and Navigation

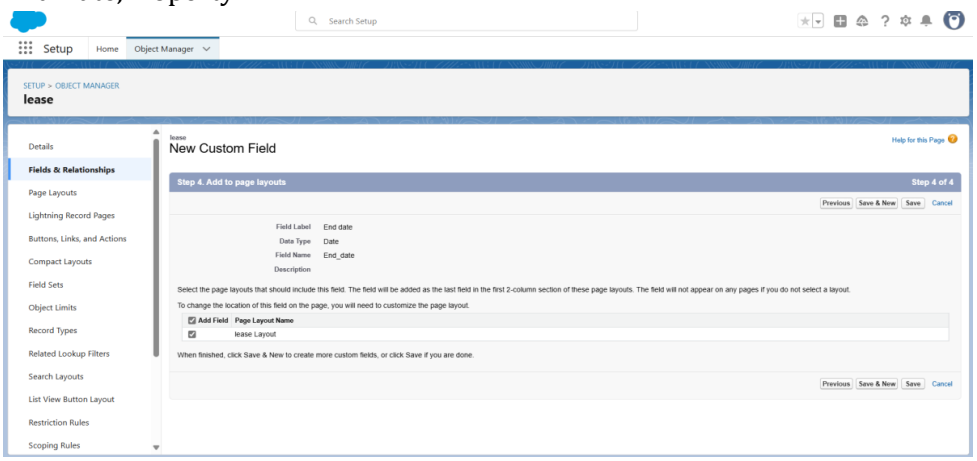
- Screenshot 1: Salesforce Login Page - Users log in using Salesforce credentials to access the Lease Management App.

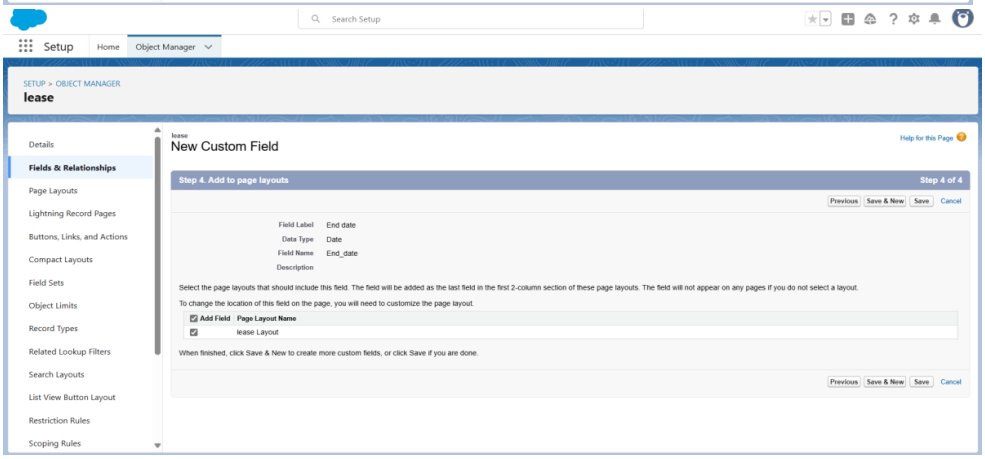


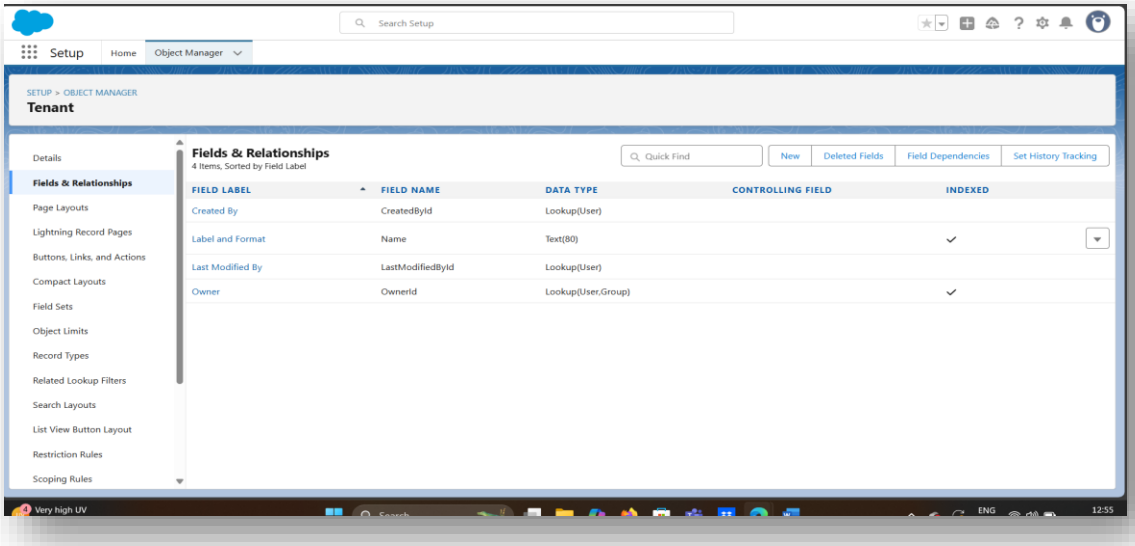
- This is the screen shot of the given one.

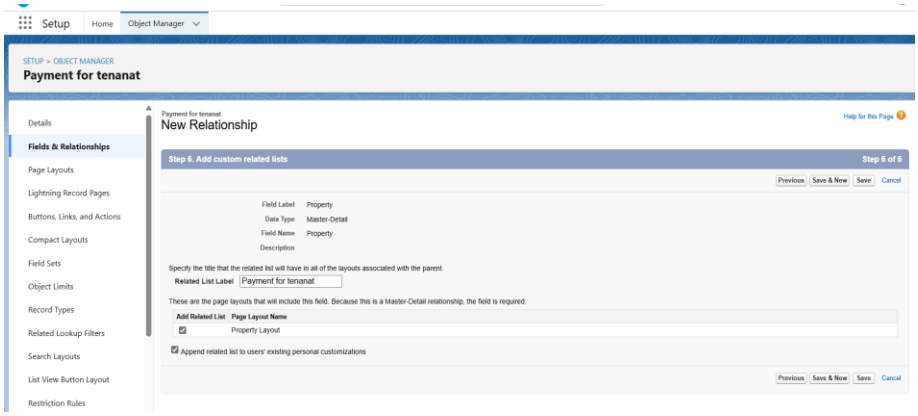
3. Lease Creation Flow

- Screenshot 3: New Lease Record Page - Fields: Tenant Name, Lease Start Date, Lease End Date,Property ID.

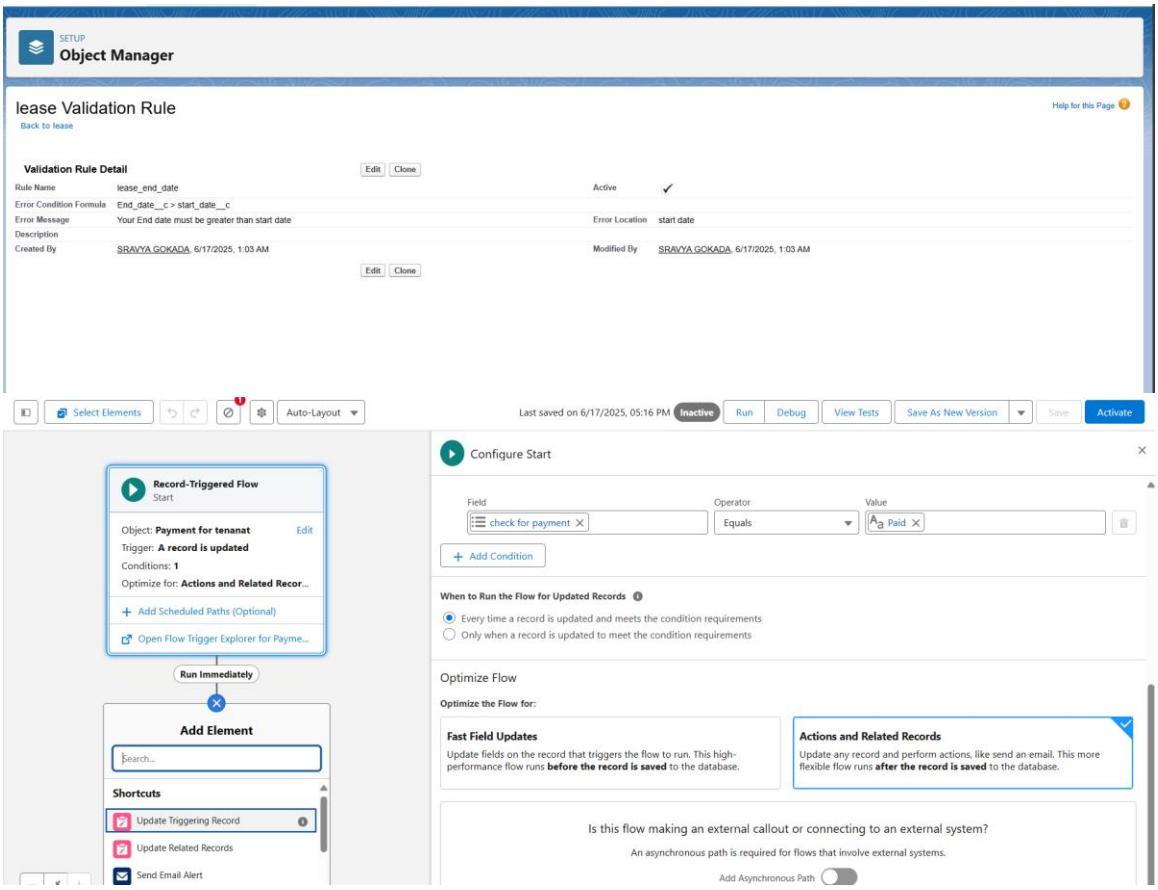


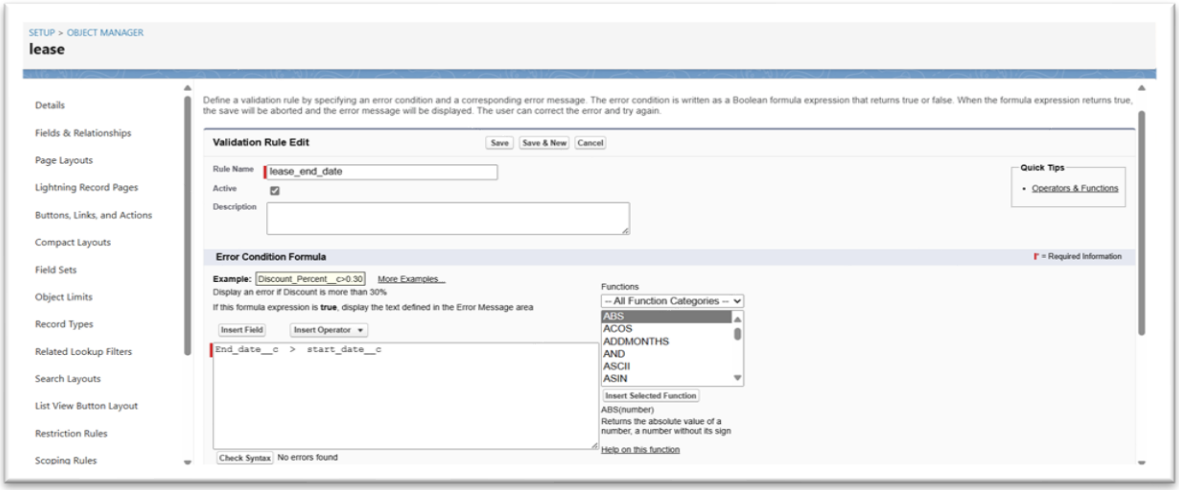






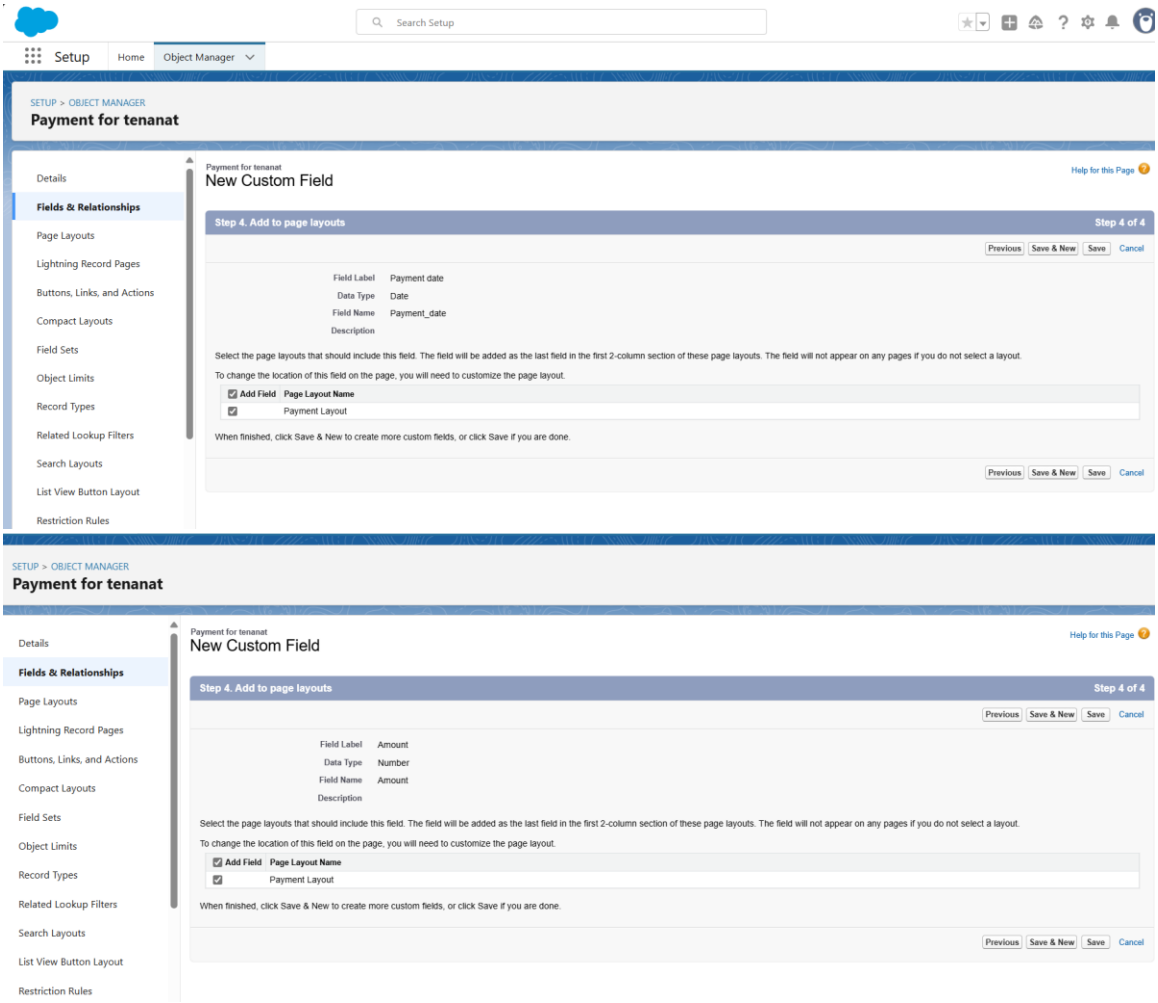
4. Automation: Lease Expiry Reminder

- Screenshot 4: Flow Builder – Lease Expiry Notification - Scheduled flow sends email 30 days before lease end date.
- Flow Details: Object: Lease__c, Condition: End_Date__c - >start_date__c = 30, Action: Send Email.
- 

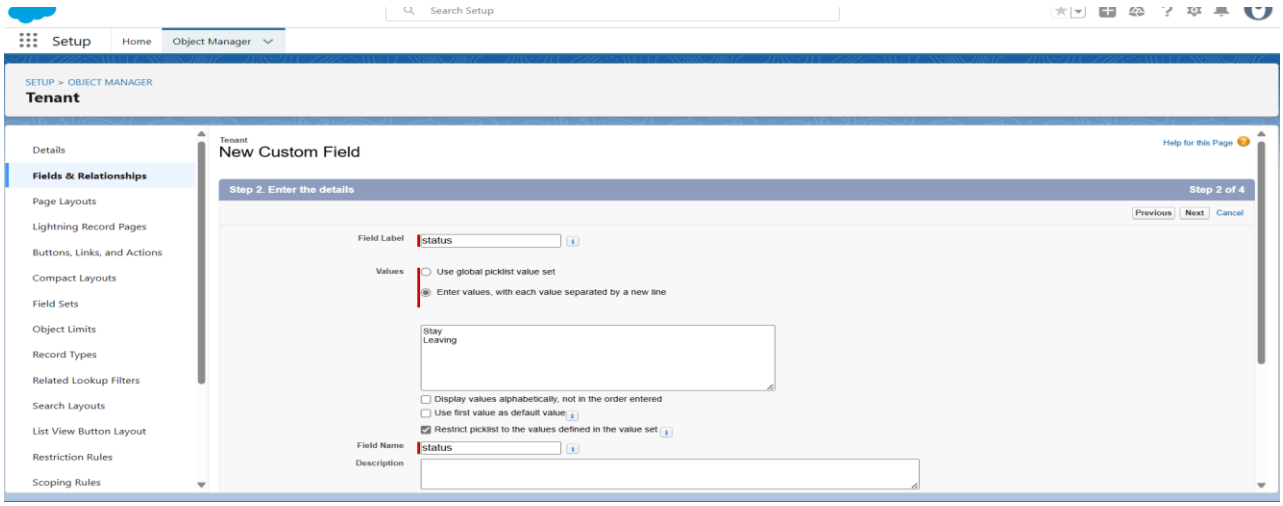


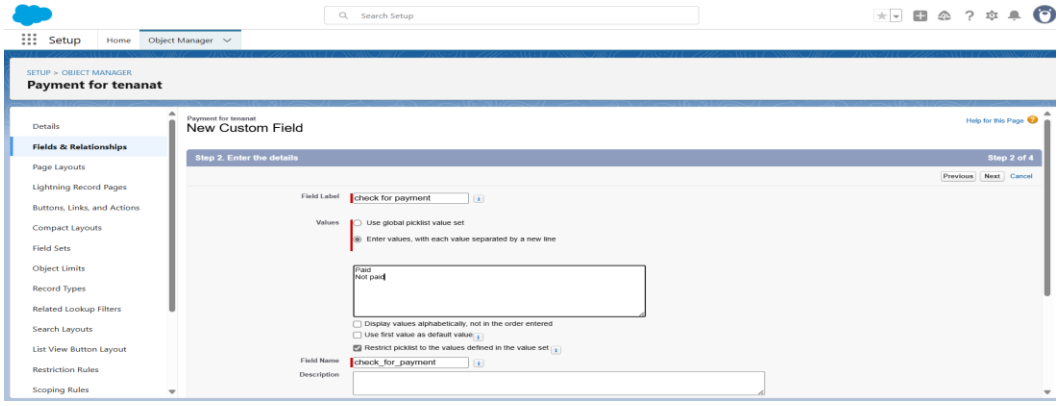
5. Payment Management

- Screenshot 5: New Payment Record - Amount Paid, Payment Date, Status



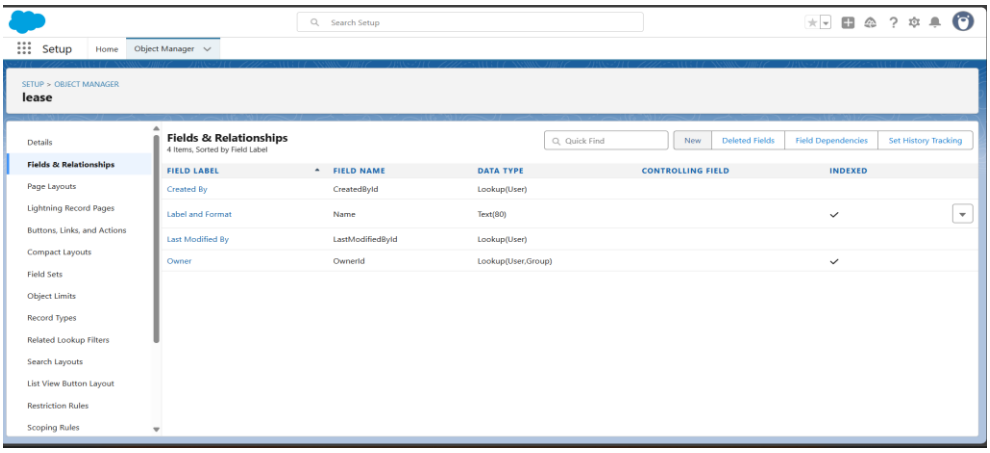
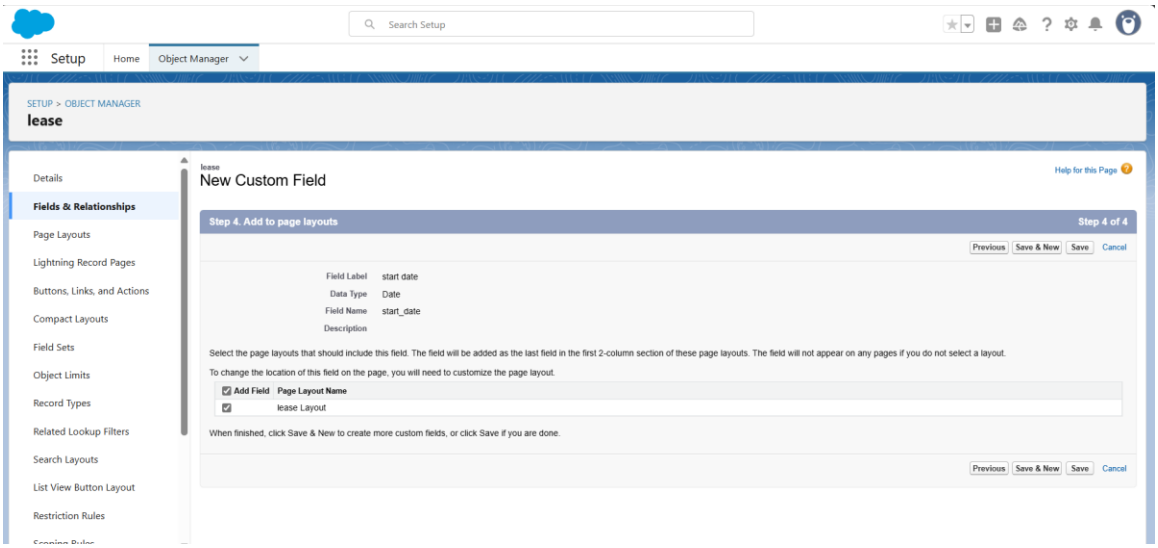
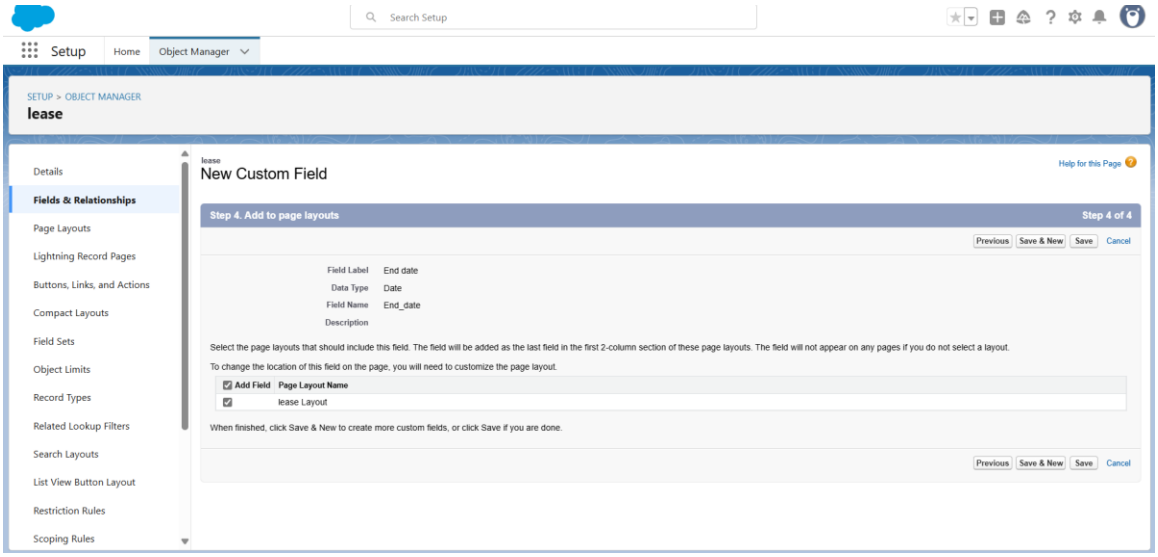
Automation: Scheduled Flow checks for overdue payments weekly, Lease__c payment status

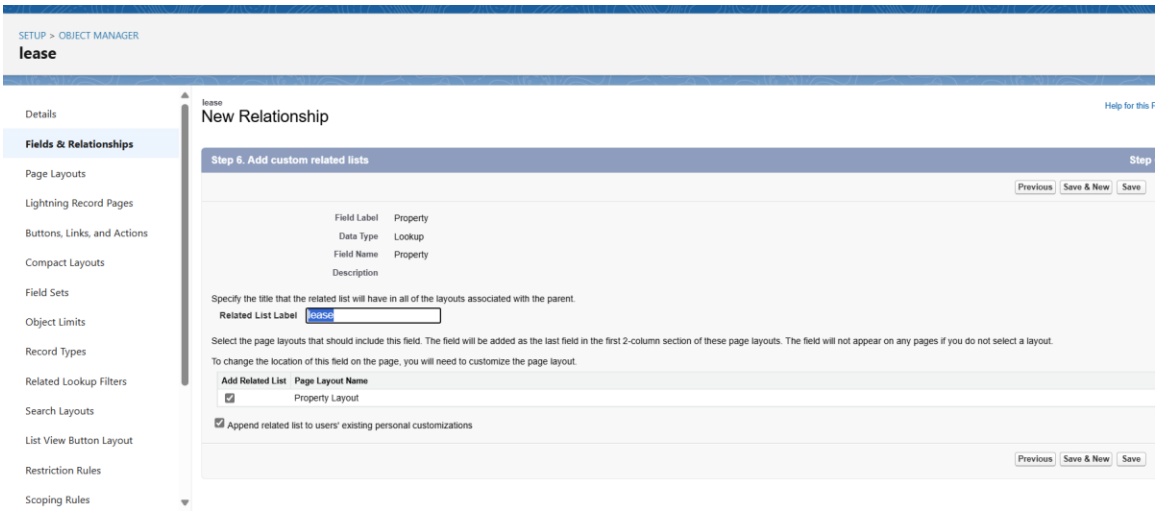




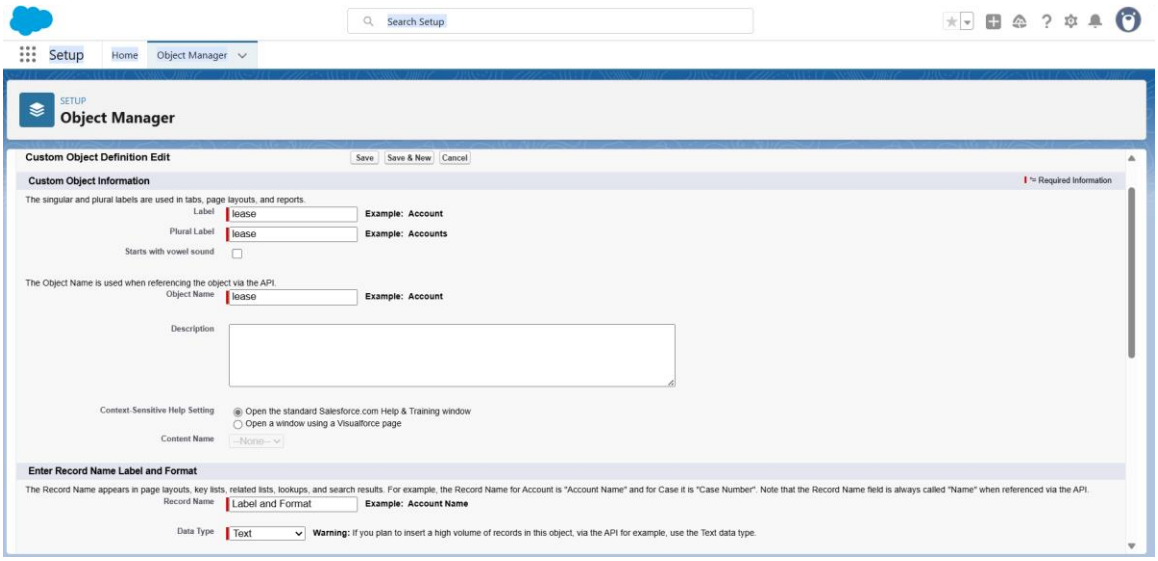
6. Document Upload Feature

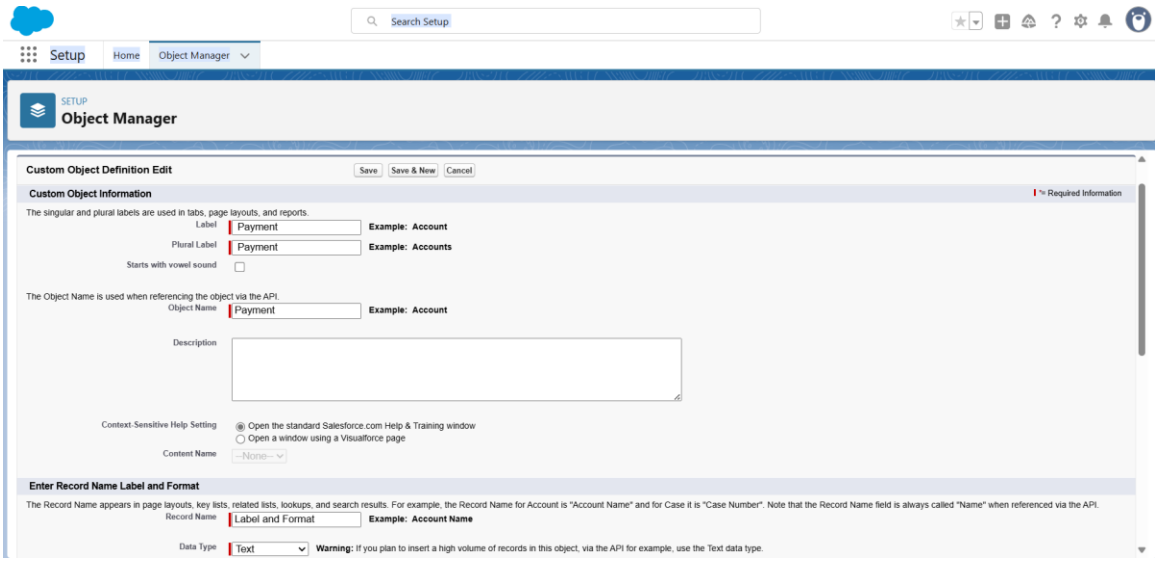
- Screenshot 8: Files Related List – Lease Record - Upload lease agreements, View/download from Files tab.
- Implementation: Files related list enabled on Lease__c page layout.

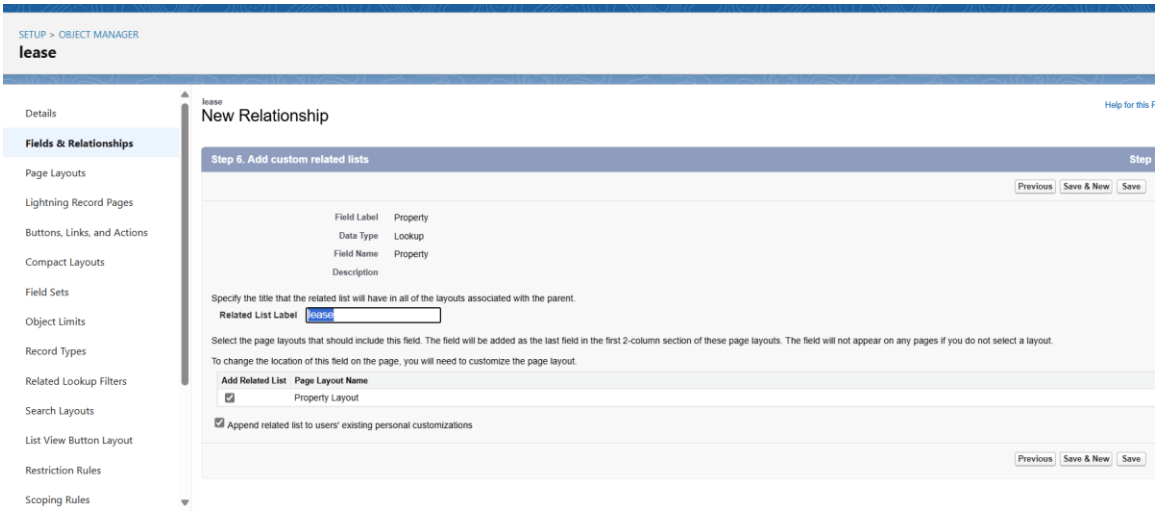
- 
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
lease
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Fields & Relationships
4 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Created By
CreatedById
Lookup(User)
Label and Format
Name
Text(80)
Last Modified By
LastModifiedById
Lookup(User)
Owner
OwnerId
Lookup(User,Group)
- 
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
lease
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
lease
New Custom Field
Help for this Page
Step 4. Add to page layouts
Step 4 of 4
Previous
Save & New
Save
Cancel
Field Label
start date
Data Type
Date
Field Name
start_date
Description
Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.
To change the location of this field on the page, you will need to customize the page layout.
Add Field
Page Layout Name
lease Layout
When finished, click Save & New to create more custom fields, or click Save if you are done.
- 
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
lease
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
lease
New Custom Field
Help for this Page
Step 4. Add to page layouts
Step 4 of 4
Previous
Save & New
Save
Cancel
Field Label
End date
Data Type
Date
Field Name
End_date
Description
Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.
To change the location of this field on the page, you will need to customize the page layout.
Add Field
Page Layout Name
lease Layout
When finished, click Save & New to create more custom fields, or click Save if you are done.

- 

7. User Profiles & Permissions

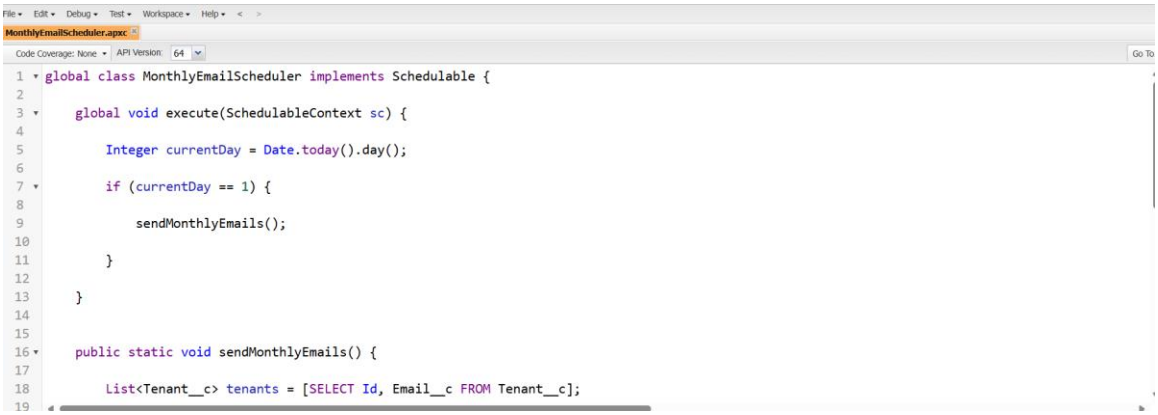
- Screenshot : Profile Setup for Property Manager - Object permissions (Read/Create/Edit on Lease__c, Payment__c), Record-level access via sharing rules.
- 

- 

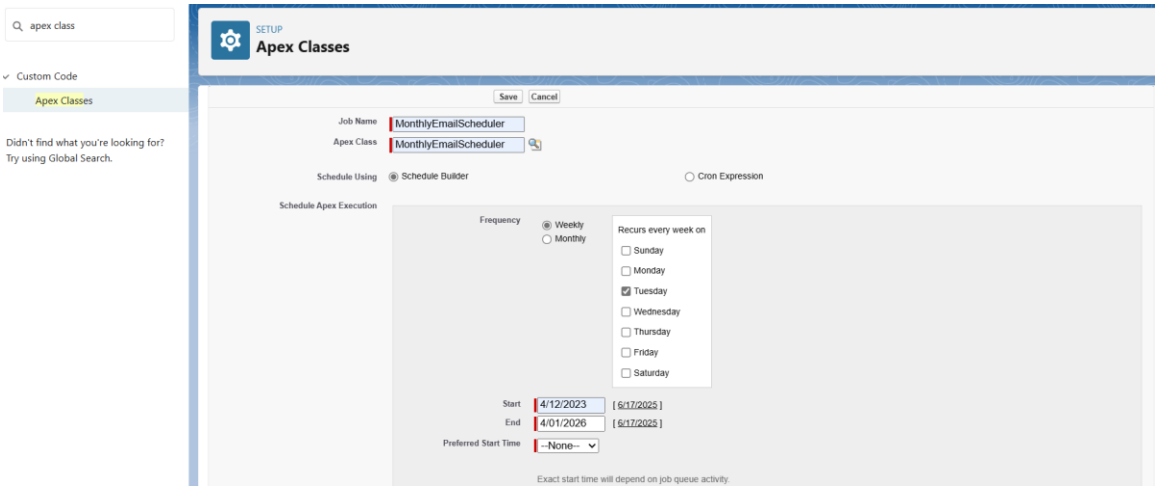
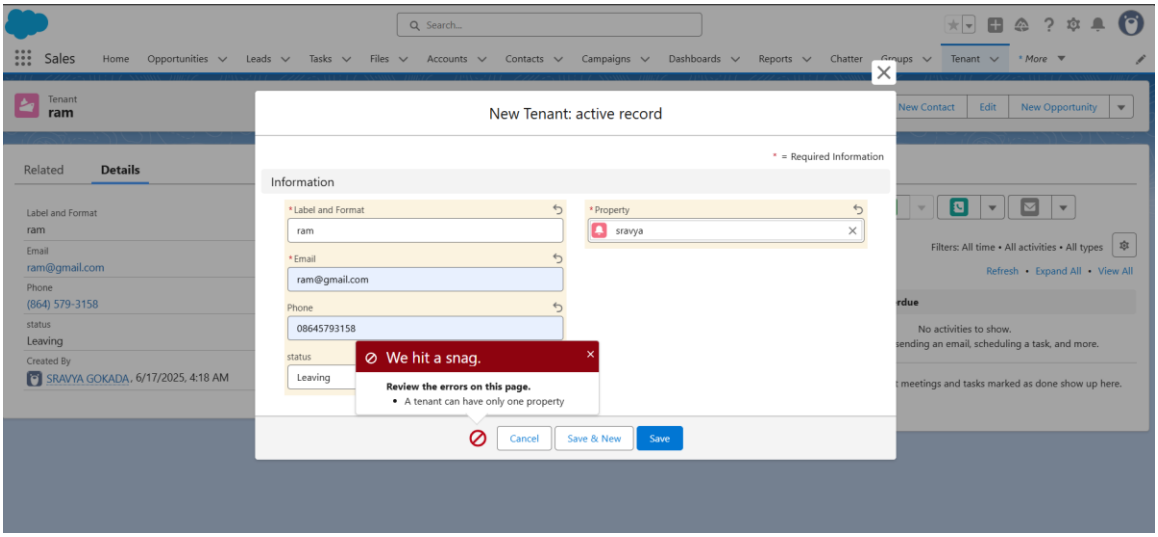
- 

8. Deployment & Packaging

- → production deployment, Tested with UAT scripts and error logs/Apex, Scheduleing

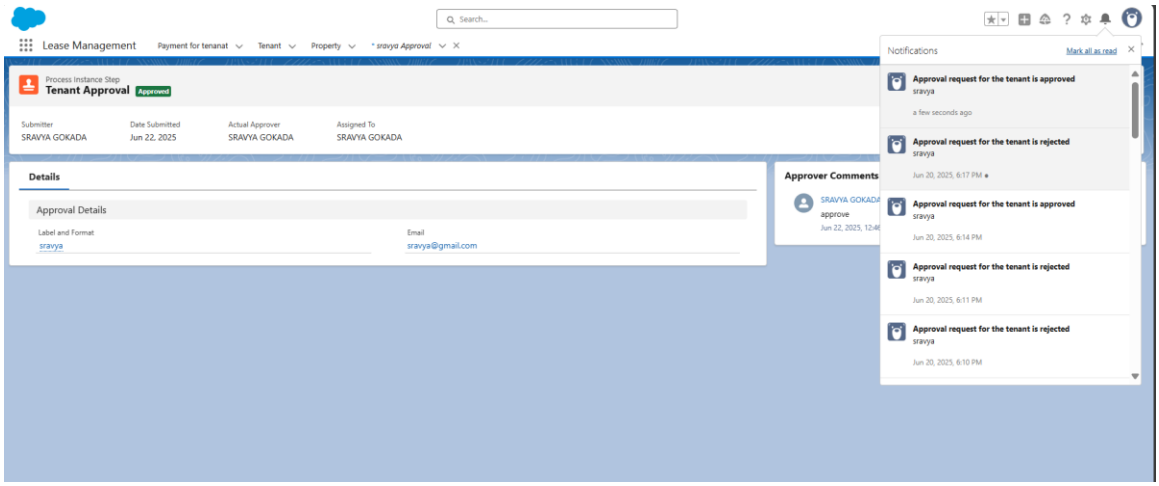


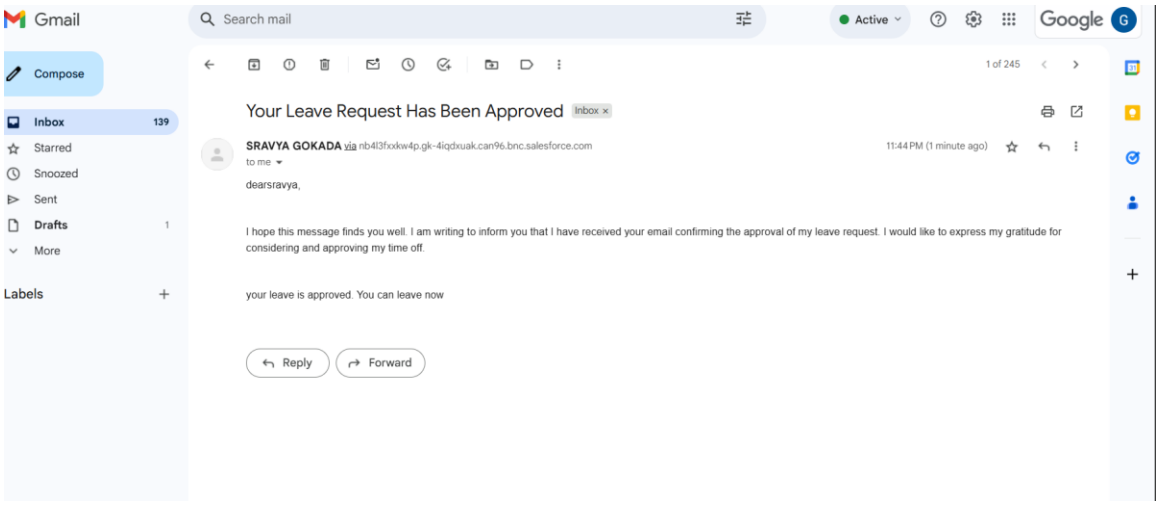
```
1  global class MonthlyEmailScheduler implements Schedulable {
2
3      global void execute(SchedulableContext sc) {
4
5          Integer currentDay = Date.today().day();
6
7          if (currentDay == 1) {
8
9              sendMonthlyEmails();
10
11         }
12
13     }
14
15
16     public static void sendMonthlyEmails() {
17
18         List<Tenant__c> tenants = [SELECT Id, Email__c FROM Tenant__c];
19
```

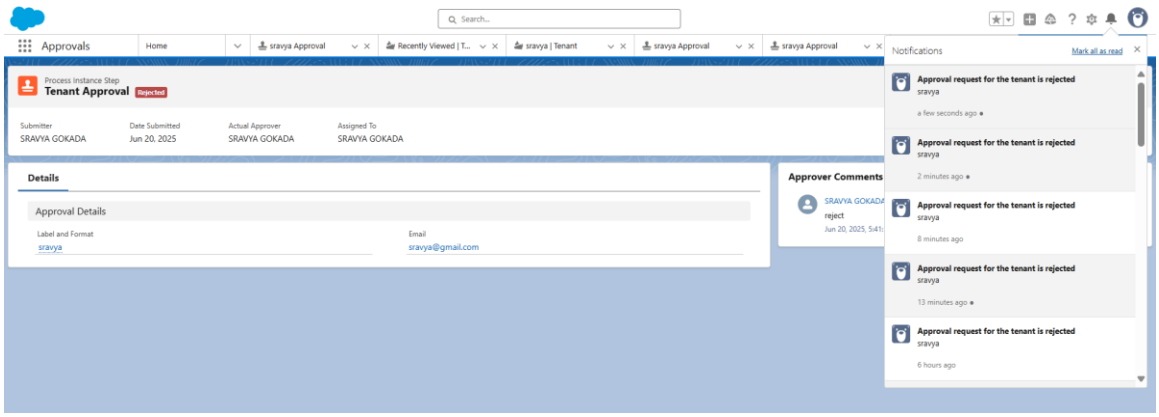
-
MonthlyEmailScheduler.apxc
Code Coverage: None
API Version: 64
for (Tenant__c tenant : tenants) {
String recipientEmail = tenant.Email__c;
String emailContent = 'I trust this email finds you well. I am writing to remind you that the monthly rent is due Your timely paymen
String emailSubject = 'Reminder: Monthly Rent Payment Due';
Messaging.SingleEmailMessage email = new Messaging.SingleEmailMessage();
email.setToAddresses(new String[]{recipientEmail});
email.setSubject(emailSubject);
email.setPlainTextBody(emailContent);
Messaging.sendEmail(new Messaging.SingleEmailMessage[]{email});
- 
apex class
Custom Code
Apex Classes
Didn't find what you're looking for? Try using Global Search.
SETUP
Apex Classes
Save
Cancel
Job Name
MonthlyEmailScheduler
Apex Class
MonthlyEmailScheduler
Schedule Using
Schedule Builder
Cron Expression
Schedule Apex Execution
Frequency
Weekly
Monthly
Recurs every week on
Sunday
Monday
Tuesday
Wednesday
Thursday
Friday
Saturday
Start
4/12/2023
[6/17/2025]
End
4/01/2026
[6/17/2025]
Preferred Start Time
--None--
Exact start time will depend on job queue activity.
- 
Sales
Home
Opportunities
Leads
Tasks
Files
Accounts
Contacts
Campaigns
Dashboards
Reports
Chatter
Tenant
Tenant
ram
New Contact
Edit
New Opportunity
Related
Details
Label and Format
ram
Email
ram@gmail.com
Phone
(864) 579-3158
status
Leaving
Created By
SRAVYA GOKADA, 6/17/2025, 4:18 AM
New Tenant: active record
* = Required Information
Information
*Label and Format
ram
*Property
sravya
*Email
ram@gmail.com
Phone
08645793158
status
Leaving
We hit a snag.
Review the errors on this page.
A tenant can have only one property
Cancel
Save & New
Save
Filters: All time • All activities • All types
Refresh • Expand All • View All
No activities to show.
sending an email, scheduling a task, and more.
meetings and tasks marked as done show up here.

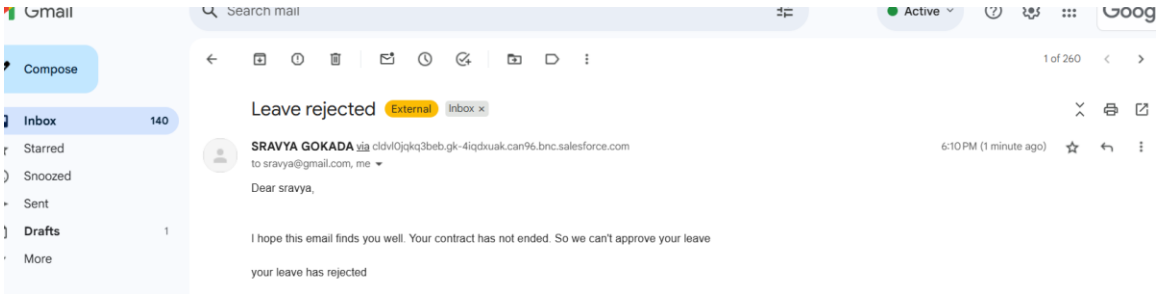
8.Output:

Screenshot:









Conclusion

The Lease Management system in Salesforce streamlines the entire lifecycle of leasing—from onboarding tenants to renewals, payment tracking, and maintenance management—supported by automation, flows, and dashboards. This document represents the executable components necessary to run.