

Lease Management System – Project Executables Document

Platform: Salesforce

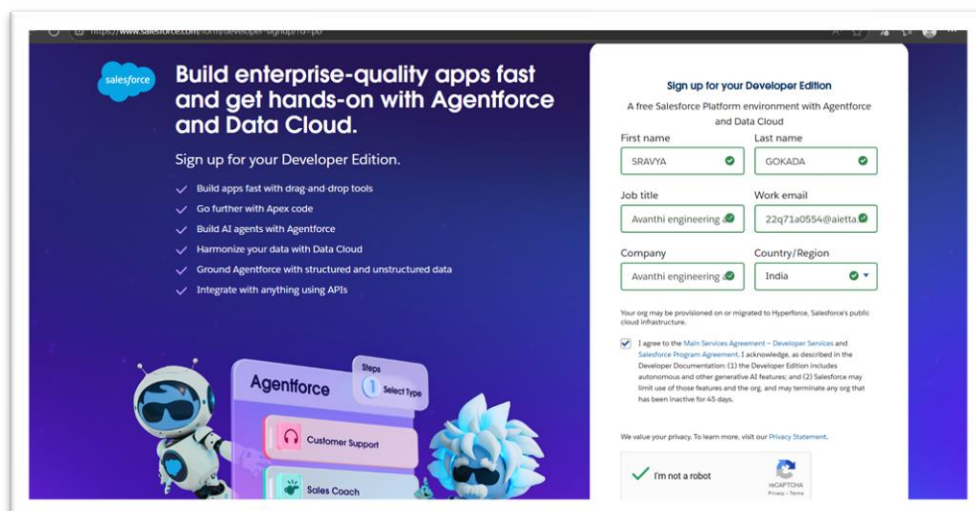
Technology Stack: Salesforce CRM, Apex, Flow Builder, Lightning App Builder, Salesforce Data Model

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.

Setup > OBJECT MANAGER
lease

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

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Scoping Rules

New Custom Field

Step 4 of 4: Add to page layouts

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.

Previous Save & New Save Cancel

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☒ lease Layout

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

Previous Save & New Save Cancel

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Tenant

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Fields & Relationships

4 Items, Sorted by Field Label

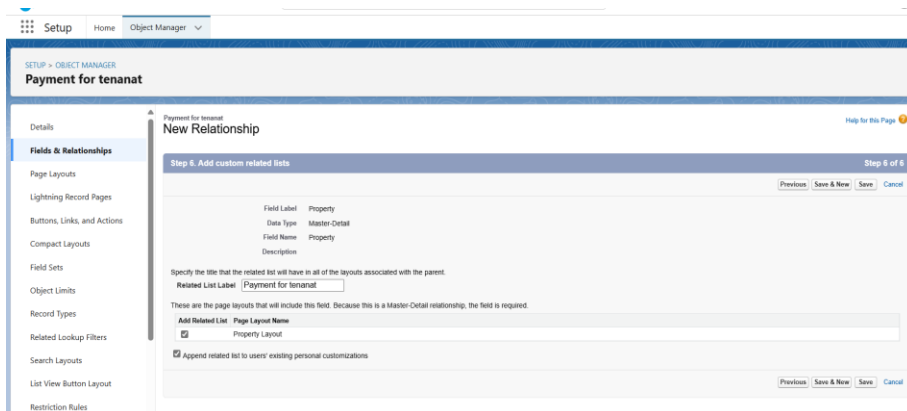
Quick Find

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)		✓

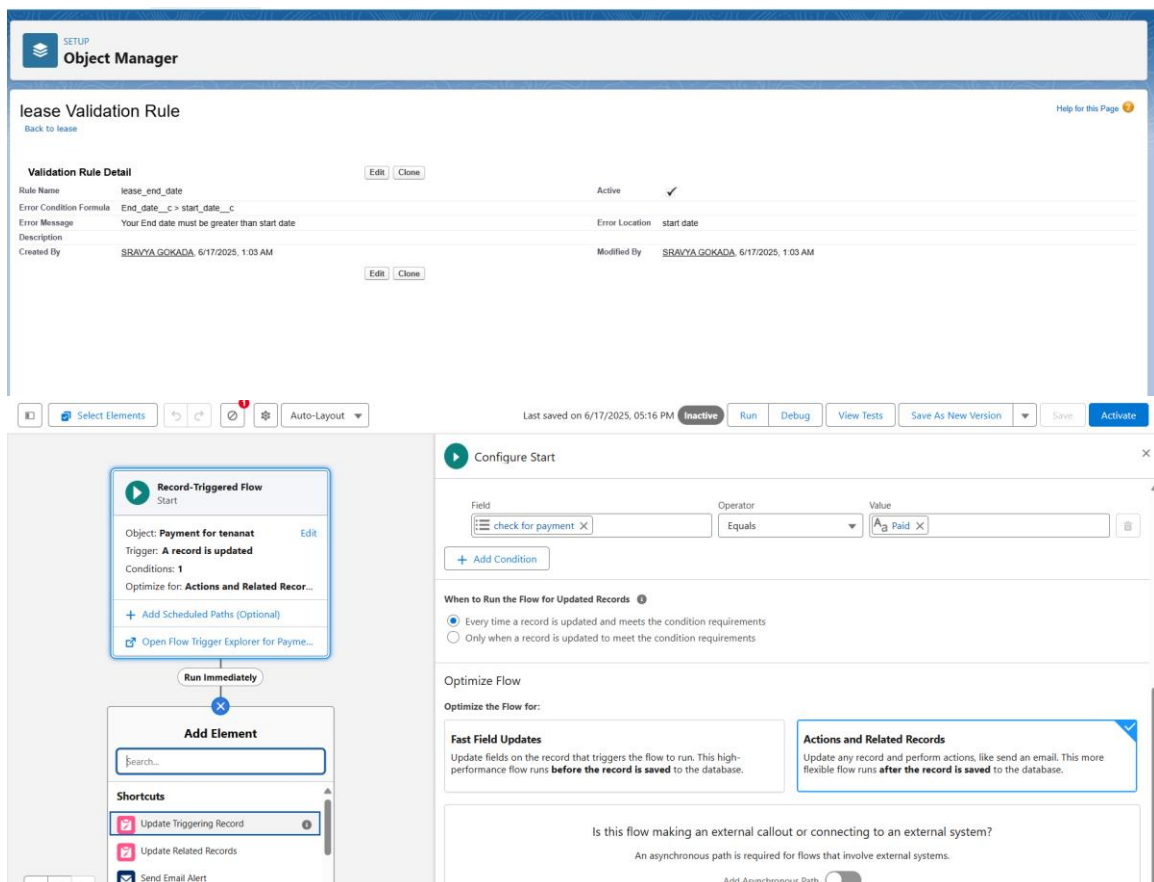
Very high UV

12:55



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.



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Define a validation rule by specifying an error condition and a corresponding error message. The error condition is written as a Boolean formula expression that returns true or false. When the formula expression returns true, the save will be aborted and the error message will be displayed. The user can correct the error and try again.

Validation Rule Edit Save Save & New Cancel

Rule Name:

Active: ☒

Description:

Error Condition Formula Required Information

Example: [More Examples...](#)

Display an error if Discount is more than 30%

If this formula expression is true, display the text defined in the Error Message area

Functions

-- All Function Categories --

ABS

ACOS

ADDMONTHS

AND

ASCII

ASIN

ABS(number)

Returns the absolute value of a number, a number without its sign

[Help on this function](#)

No errors found

Quick Tips

- Operators & Functions

5. Payment Management

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

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Payment for tenant

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New Custom Field

Help for this Page

Step 4. Add to page layouts Step 4 of 4

Previous Save & New Save Cancel

Field Label	Payment date
Data Type	Date
Field Name	Payment_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

☒ Payment Layout

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

Previous Save & New Save Cancel

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Help for this Page

Step 4. Add to page layouts Step 4 of 4

Previous Save & New Save Cancel

Field Label	Amount
Data Type <td>Number</td>	Number
Field Name <td>Amount</td>	Amount
Description <td></td>	

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

☒ Payment Layout

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

Previous Save & New Save Cancel

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

This screenshot shows the 'New Custom Field' page for the 'Tenant' object in Salesforce Setup. The page is titled 'Step 2. Enter the details' and is part of a 4-step process. The left sidebar shows the 'Fields & Relationships' section. The main content area has the following fields and options:

- Field Label:** status
- Values:**
 - ☐ Use global picklist value set
 - ☒ Enter values, with each value separated by a new line
- Text Area:** Stay Leaving
- ☐ 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
- Description:** (empty)

This screenshot shows the 'New Custom Field' page for the 'Payment for tenant' object in Salesforce Setup. The page is titled 'Step 2. Enter the details' and is part of a 4-step process. The left sidebar shows the 'Fields & Relationships' section. The main content area has the following fields and options:

- Field Label:** check for payment
- Values:**
 - ☐ Use global picklist value set
 - ☒ Enter values, with each value separated by a new line
- Text Area:** Paid Not paid
- ☐ 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:** check_for_payment
- Description:** (empty)

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.

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4 Items, Sorted by Field Label

Q, Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Label and Format	Name	Text(80)		✓
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

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Save

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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.

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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.

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☒ Add Field

Page Layout Name

lease Layout

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

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New Relationship

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

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
<input checked="" type="checkbox"/>	Property Layout

☒ Append related list to users' existing personal customizations

Previous Save & New Save

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.

Search Setup

Setup Home Object Manager

Object Manager

Custom Object Definition Edit

Save Save & New Cancel

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

Context Sensitive Help Setting

☒ Open the standard Salesforce.com Help & Training window

☐ Open a window using a Visualforce page

Content Name

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name Example: Account Name

Data Type 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

Object Manager

Custom Object Definition Edit

Save Save & New Cancel

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.

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Record Name Example: Account Name

Data Type Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.

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New Relationship

Step 6. Add custom related lists

Previous Save & New Save

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

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
<input checked="" type="checkbox"/>	Property Layout

☒ Append related list to users' existing personal customizations

Previous Save & New Save

8. Deployment & Packaging

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

```

File • Edit • Debug • Test • Workspace • Help • < >
MonthlyEmailScheduler.apex
Code Coverage: None API Version: 64 Go To
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

```



```

File • Edit • Debug • Test • Workspace • Help • < >
MonthlyEmailScheduler.apxc
Code Coverage: None • API Version: 64
G

20 for (Tenant__c tenant : tenants) {
21
22     String recipientEmail = tenant.Email__c;
23
24     String emailContent = 'I trust this email finds you well. I am writing to remind you that the monthly rent is due Your timely payment';
25
26     String emailSubject = 'Reminder: Monthly Rent Payment Due';
27
28     Messaging.SingleEmailMessage email = new Messaging.SingleEmailMessage();
29
30     email.setToAddresses(new String[]{recipientEmail});
31
32     email.setSubject(emailSubject);
33
34     email.setPlainTextBody(emailContent);
35
36     Messaging.sendEmail(new Messaging.SingleEmailMessage[]{email});
37
38 }

```

Q apex class

Custom Code

Apex Classes

Didn't find what you're looking for? Try using Global Search.

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.

Search...

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups Tenant More

Tenant ram

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

*Email ram@gmail.com

Phone 08645793158

status Leaving

*Property sravya

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

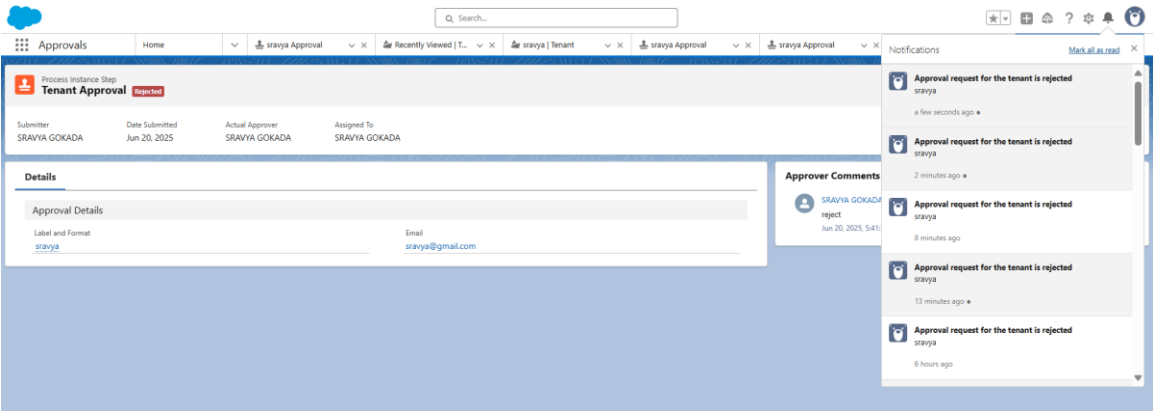
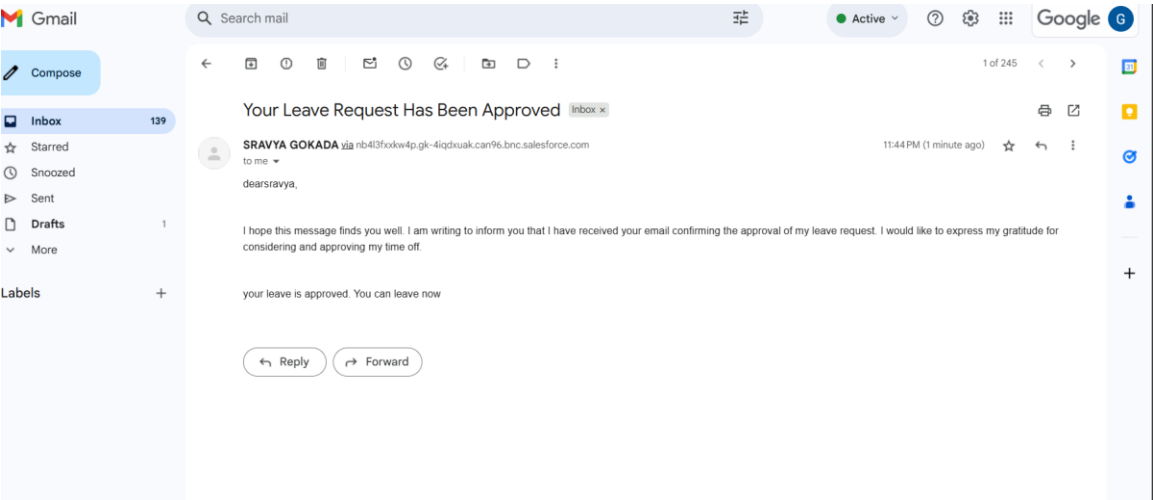
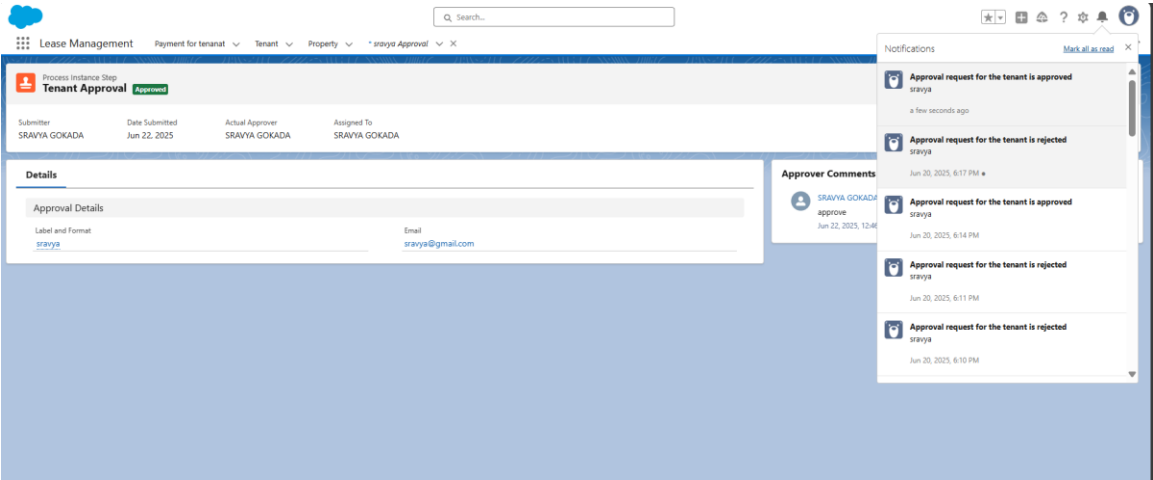
Refresh Expand All View All

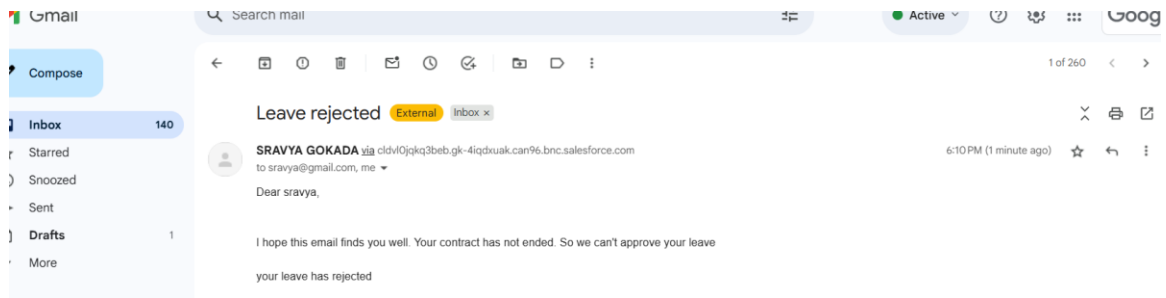
No activities to show.

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.