

LEASE MANAGEMENT

SALES FORCE



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INDEX:

- 1.INTRODUCTION**
- 2.WHAT IS SALESFORCE**
- 3.OVERVIEW**
- 4.DATA MODEL**
- 5.BUSINESS LOGIC**
- 6.UI CONFIGURATION**
- 7.REPORTS AND DASHBOARDS**
- 8.SECURITY AND PERMISSIONS**
- 9.APEX CLASS**
- 10.SCHEDULE CLASS**
- 11.CONCLUSION.**

Salesforce

Introduction:

Salesforce is a cloud-based customer relationship management (CRM) platform that enables businesses to manage sales, marketing, and customer service activities in a single platform. It provides tools for sales teams to track leads, manage accounts, and forecast sales, as well as marketing automation and customer service capabilities. Salesforce is highly customizable and scalable, making it a popular choice for businesses of all sizes. Its features include:

- Contact and account management
- Sales forecasting and pipeline management
- Marketing automation
- Customer service and support
- Analytics and reporting
- Integration with other business applications

Salesforce is widely used across various industries, and its platform is constantly evolving with new features and innovations.

What is Salesforce?

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud. So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this: <https://youtu.be/r9EX3IGde5k>

Overview

Here's a project overview of Lease Management in Salesforce:

Project Title: Lease Management System

Objective: Develop a customized Salesforce application to manage leases, track lease agreements, and automate lease-related processes for a real estate company.

Key Features:

1. Lease Agreement Management: Store and manage lease agreements, including lease terms, rent, and security deposits.
2. Lease Tracking: Track lease start and end dates, renewal options, and notice periods.
3. Rent Management: Manage rent payments, payment schedules, and late payment fees.
4. Lease Renewal and Termination: Automate lease renewal and termination processes, including notifications and reminders.
5. Reporting and Analytics: Generate reports on lease performance, rent payments, and lease expirations.

Salesforce Features Used:

1. Custom Objects: Create custom objects for Lease Agreements, Rent Payments, and Lease Terms.
2. Workflows and Approvals: Automate lease approval and renewal processes using workflows and approvals.
3. Triggers and Validation Rules: Use triggers and validation rules to enforce data consistency and accuracy.
4. Dashboards and Reports: Create custom dashboards and reports to provide insights into lease performance and rent payments.

Creating Developer Account:

Creating a developer org in salesforce.

1. Go to <https://developer.salesforce.com/signup>
2. On the sign up form, enter the following details:

Sign up for your Developer Edition.

Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud.

- ✓ Build apps fast with drag-and-drop tools
- ✓ Go further with Apex code
- ✓ Build AI agents with Agentforce
- ✓ Harmonize your data with Data Cloud
- ✓ Ground Agentforce with structured and unstructured data
- ✓ Integrate with anything using APIs

Your org may be provisioned on or migrated to Hyperforce. Salesforce will reuse infrastructure.

I agree to the Main Services Agreement - Developer Services and Salesforce Program Agreement. I acknowledge, as described in the Developer Documentation, (1) the Developer Edition includes autonomous and other generative AI features; and (2) Salesforce may disable those features and the org, and may terminate any org that has been inactive for 90 days.

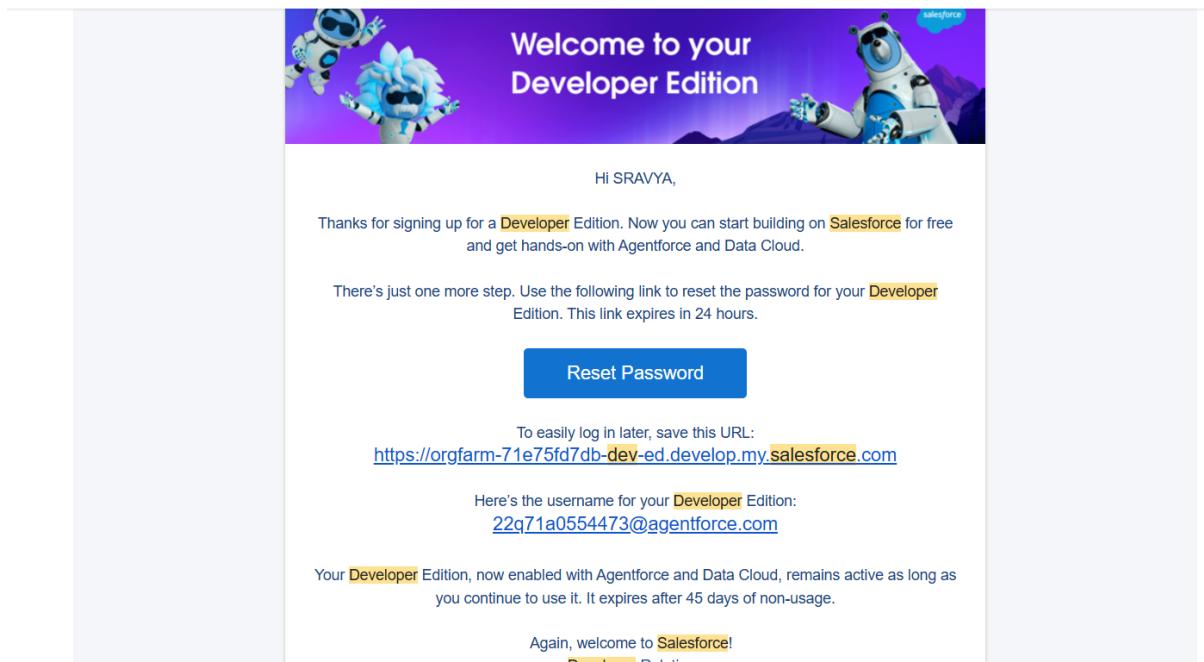
We value your privacy. To learn more, visit our Privacy Statement.

I'm not a robot 

1. Firstname & Last name
2. Ermal
3. Role: Developer
4. Company College Name
5. County: India
6. Postal Code: pin code
7. Usernarne should be a combination of your name and company

Account Activation:

1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10 mins



1. Click on Verify Account
2. Give a password and answer a security question and click on change password.
3. Give a password and answer a security question and click on change password.
4. Then you will redirect to your salesforce setup page.

The screenshot shows an email inbox interface with various icons at the top. The main content is an email from support@salesforce.com. The subject line is "Finish resetting your Salesforce password". The body of the email contains a message from Salesforce stating they received a password reset request for the username 22q71a0554473@agentforce.com. It includes a link for password reset: https://orgfarm-71e75fd7db-dev-ed.develop.my.salesforce.com/?c=7lFgWGPmiRyGeUpY0eYLismGdXZRTm9b1s_5rHQLAmKhb7a8nCFmV_9KnMktgH5EyFqs4gPp7WAjIX2hZL9c0KMT_hoW5DFsk7qENGKRmkx1vg7l1Wh_rk7ig8ofsigUwzICnSVoTXeJEnNYmX1mlv19pqYWZhP5ENNdy5q6aeTvn_VF_JBGIRuxSqJ5H_l2O12zr2Tl2RBQNsbggsEfkNzMJALRrEugU5YhmRXikoS7yDMW31wfMgE7l2DKWWlbN8P9GamSmAYkmnhlHAD_lvGdBw%3D%3D. A note at the bottom says, "If you didn't ask for your password to be reset, contact your [Salesforce](#) administrator."

DATA MODEL

OBJECTS:

Salesforce objects are database tables that permit you to store data that is specific to an organization. What are the types of Salesforce objects

Salesforce objects are of two types:

1. Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
2. Custom Objects: Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

The screenshot shows the Salesforce Object Manager page. At the top, there's a navigation bar with tabs for 'Setup', 'Home', and 'Object Manager'. Below the navigation is a search bar labeled 'Search Setup'. On the right side of the header, there are buttons for 'Quick Find', 'Schema Builder', and 'Create'. A dropdown menu is open, showing 'Custom Object' and 'Custom Object from Spreadsheet'. The main content area displays a table of objects. The columns are labeled 'LABEL', 'API NAME', 'TYPE', 'DESCRIPTION', and 'LAST MODIFIED'. The table lists various standard objects like 'Work Type Group Member', 'Work Type Group', 'Work Type', etc. The 'TYPE' column consistently shows 'Standard Object'. The 'LAST MODIFIED' column shows dates ranging from 2019 to 2020. At the bottom of the page, there's a footer with a 'NIFTY -0.28%' stock tickers and a system status bar with icons for battery, signal, and date/time.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED
Work Type Group Member	WorkTypeGroupMember	Standard Object		5/20/2020
Work Type Group	WorkTypeGroup	Standard Object		5/20/2020
Work Type	WorkType	Standard Object		5/20/2020
Work Step Template	WorkStepTemplate	Standard Object		5/20/2020
Work Step	WorkStep	Standard Object		5/20/2020
Work Plan Template Entry	WorkPlanTemplateEntry	Standard Object		5/20/2020
Work Plan Template	WorkPlanTemplate	Standard Object		5/20/2020
Work Plan	WorkPlan	Standard Object		5/20/2020
Work Order Line Item	WorkOrderLineItem	Standard Object		5/20/2020
Work Order	WorkOrder	Standard Object		5/20/2020
Web Store Inventory Source	WebStoreInventorySource	Standard Object		5/20/2020
Store Catalog	WebStoreCatalog	Standard Object		5/20/2020
Store Buyer Group	WebStoreBuyerGroup	Standard Object		5/20/2020

Create Property Object:

To create an object

1. From the setup page >> Click on Object Manager >> Click on Create and Click on Custom Object.

1. Enter the label name>> property
2. Plural label name>> property
3. Enter Record Name Label and Format
 - .Record Name>>property Name
 - .Data Type Text

2.Click on Allow reportl and Track Field History, Allow Activities
 3. Allow search >>Save

New Custom Object

Custom Object Definition Edit

Custom Object Information

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

Label	Property	Example: Account
Plural Label	Property	Example: Accounts

Starts with vowel sound

The Object Name is used when referencing the object via the API.

Object Name	Property	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.

SETUP > OBJECT MANAGER

Property

Details

Data Type: Text

Optional Features

- Allow Reports
- Allow Activities
- Track Field History
- Allow in Chatter Groups
- Enable Licensing

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. Learn more.

- Allow Sharing
- Allow Bulk API Access
- Allow Streaming API Access

Deployment Status

- In Development
- Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. Learn more.

- Allow Search

Buttons

Save | Save & New | Cancel

Create Tenant Object:

create an object:

1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.

1. Enter the label name >> Tenant

2. Plural label name >> Tenants

3. Enter Record Name Label and Format

To • Record Name >> Tenant Name
 • Data Type >> Text

2. Click on Allow reports and Track Field History Allow Activities

3. Allow search >> Save.

The screenshot shows the 'Custom Object Definition Edit' screen in the Salesforce Object Manager. The 'Label' field contains 'Tenant' and the 'Plural Label' field contains 'Tenants'. The 'Record Name' field is set to 'Tenant Name' with an example of 'Account Name'. The 'Data Type' is set to 'Text'. Other fields like 'Object Name', 'Description', and 'Content Name' are also visible.

Allow Reports
 Allow Activities
 Track Field History
 Allow in Chatter Groups
 Enable Licensing

Object Classification
When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more.](#)

Allow Sharing
 Allow Bulk API Access
 Allow Streaming API Access

Deployment Status
 In Development
 Deployed

Search Status
When this setting is enabled, your users can find records of this object type when they search. [Learn more.](#)

Allow Search

Object Creation Options (Available only when custom object is first created)

Add Notes and Attachments related list to default page layout
 Launch New Custom Tab Wizard after saving this custom object

[Save](#) [Save & New](#) [Cancel](#)

Create Payment Object

To create an object:

1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.

1. Enter the label name>> Payment for tenanat
2. Plural label name>> Payment
3. Enter Record Name Label and Format

- Record Name >> Payment Name
- Data Type >> Text

2. Click on Allow reports and Track Field History, Allow Activities Allow search >> Save.

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	Payment	Example: Account
Plural Label	Payment	Example: Accounts
Starts with vowel sound	<input type="checkbox"/>	

The Object Name is used when referencing the object via the API.

Object Name	Payment	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	Label and Format	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.

Create Lease Object

To create an object:

1. From the setup page >> Click on Object Manager >>
Click on Create Click on Custom Object.

 1. Enter the label name>> lease
 2. Plural label name>> lease
 3. Enter Record Name Label and Format
 - .Record Name>> lease Name
 - .Data Type>> Text

- 2.Click on Allow reports and Track Field History Allow and Save.

Tabs

What is Tab: A tab is like a user interface that is used to build records for objects and to view the records in the objects.

Types of Tabs:

1. Custom Tabs Custom object tabs are the user interface for custom applications that you build in salesforce.com. They look and behave like standard salesforce.com tabs such as
2. Web Tabs Web Tabs are custom tabs that display web content or applications embedded in the salesforce.com window. Web tabs make it easier for your users to quickly access content and applications they frequently use without leaving the salesforce.com application accounts, contacts, and opportunities.

1. Visualforce Tabs

Visualforce Tabs are custom tabs that display a Visualforce page. Visualforce tabs look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.

2 Lightning Component Tabs

Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app

1. Lightning Page-Tab

Lightning Page Tabs let you add Lightning Pages to the mobile app navigation menu

Creating A Custom Tab

To create a Tab:(Property)

1. Go to setup page >>type Tabs in Quick Find bar >>click on tabs>> New (under custom object tab)

The screenshot shows the Salesforce Setup interface with the 'Tabs' section selected. The left sidebar shows 'User Interface' with 'Rename Tabs and Labels' and 'Tabs' selected. The main content area is titled 'Custom Tabs' and contains sections for 'Custom Object Tabs', 'Web Tabs', 'Visualforce Tabs', 'Lightning Component Tabs', and 'Lightning Page Tabs'. Each section has a 'New' button and a 'What Is This?' link. A message at the top states: 'You can create new custom tabs to extend Salesforce functionality or to build new application functionality. Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.' A help link 'Help for this Page' is also present.

The screenshot shows the 'New Custom Object Tab' creation wizard. Step 1, 'Enter the Details', is displayed. It asks to choose a custom object for the tab. The 'Object' dropdown is set to 'Property'. Other fields include 'Tab Style' (set to 'Bell'), 'Splash Page Custom Link' (set to 'None'), and a 'Description' text area. A note indicates '(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.' A 'Next' button is visible at the bottom right.

1. Select Object property >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) uncheck the include tab
2. Make sure that the Append tab to users' existing personal customizations is checked.
3. Click save

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"/>

CUSTOM TABS

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Action	Label	Tab Style	Description
Edit Del	Property	Bell	

Web Tabs [New](#) [What Is This?](#)

No Web Tabs have been defined.

Visualforce Tabs [New](#) [What Is This?](#)

No Visualforce Tabs have been defined.

Lightning Component Tabs [New](#) [What Is This?](#)

No Lightning component tabs have been defined.

Lightning Page Tabs [New](#) [What Is This?](#)

No Lightning Page Tabs have been defined.

Creating payment for Tenant Tab

1. Now create the tabs for the remaining objects, they are “ payment for tenant.”
2. Make sure that the Append tab to users' existing personal customizations is checked.
3. Click save

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. The left sidebar has 'User Interface' expanded, with 'Rename Tabs and Labels' and 'Tabs' selected. A search bar at the top says 'tabs'. The main area is titled 'Custom Tabs' and contains sections for 'Custom Object Tabs', 'Web Tabs', 'Visualforce Tabs', 'Lightning Component Tabs', and 'Lightning Page Tabs'. Each section includes a 'New' button and a 'What Is This?' link. Under 'Custom Object Tabs', there is a table with one row:

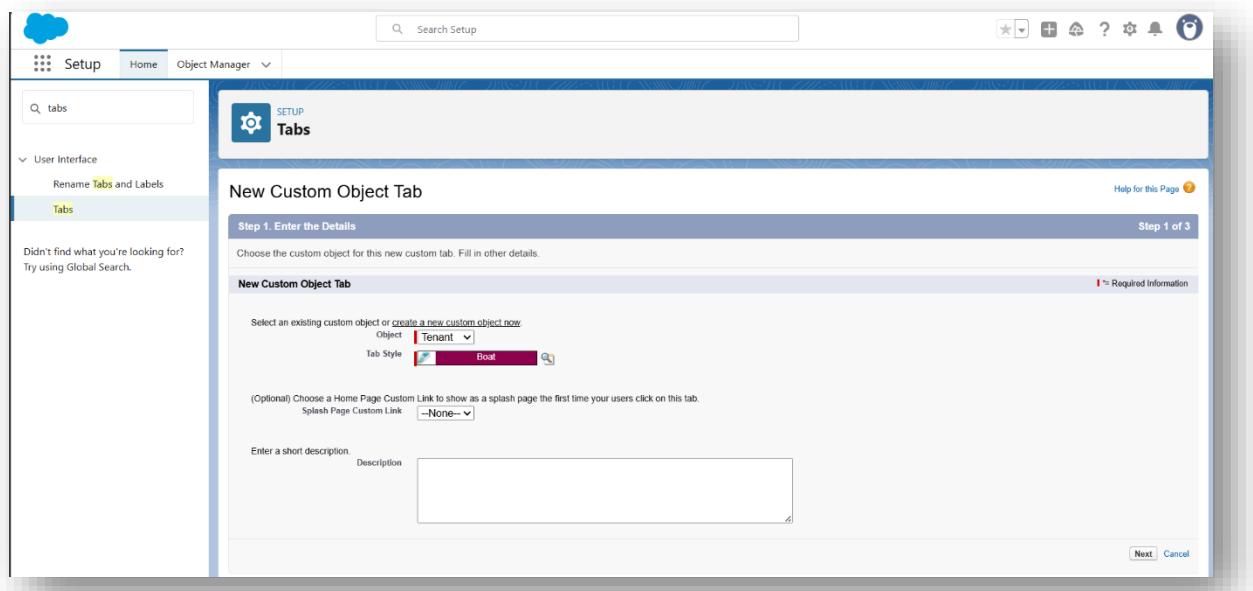
Action	Label	Tab Style	Description
Edit Del	Payment	Bell	

The screenshot shows the 'New Custom Object Tab' setup wizard, Step 1 of 3. The title is 'New Custom Object Tab'. It says 'Step 1. Enter the Details' and 'Choose the custom object for this new custom tab. Fill in other details.' There is a 'Help for this Page' link. The form fields include:

- 'New Custom Object Tab' header
- 'Step 1 of 3' indicator
- 'Select an existing custom object or create a new custom object now.' dropdowns for 'Object' (set to 'Payment') and 'Tab Style' (set to 'Big top')
- '(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.' dropdown set to 'None'
- 'Enter a short description.' text input field
- 'Next' and 'Cancel' buttons at the bottom right

Creating Tenant for Tenant Tab

1. Now create the tabs for the remaining object is Lease .
2. Make sure that the Append tab to users' existing personal customizations is checked.
3. Click save



Creating Lease for Tenant Tab

1. Now create the tabs for the remaining object is Lease.
2. Make sure that the Append tab to users' existing personal customizations is checked.
3. Click save

The screenshot shows the Salesforce Setup interface under the 'User Interface' section, specifically the 'Tabs' page. A search bar at the top left contains 'tabs'. The main content area is titled 'New Custom Object Tab' and 'Step 1. Enter the Details'. It includes fields for 'Object' (set to 'lease'), 'Tab Style' (set to 'Books'), and a 'Description' text area. A note at the bottom says '(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.' A 'Next' button is visible at the bottom right.

The screenshot shows the Salesforce Setup interface under the 'User Interface' section, specifically the 'Tabs' page. A search bar at the top left contains 'tabs'. The main content area is titled 'Custom Tabs' and displays a table of custom object tabs. The table has columns for 'Action', 'Label', 'Tab Style', and 'Description'. The 'Label' column lists 'lease', 'Payment', 'Property', and 'Tenant'. The 'Tab Style' column shows icons for 'Books', 'Big Top', 'Bell', and 'Boat'. The 'Description' column is empty. Below this table are sections for 'Web Tabs', 'Visualforce Tabs', and 'Lightning Component Tabs', each with a note indicating 'No [tab type] Tabs have been defined'. A 'New' button is visible at the top right of the table section.

BUSINEES LOGIC

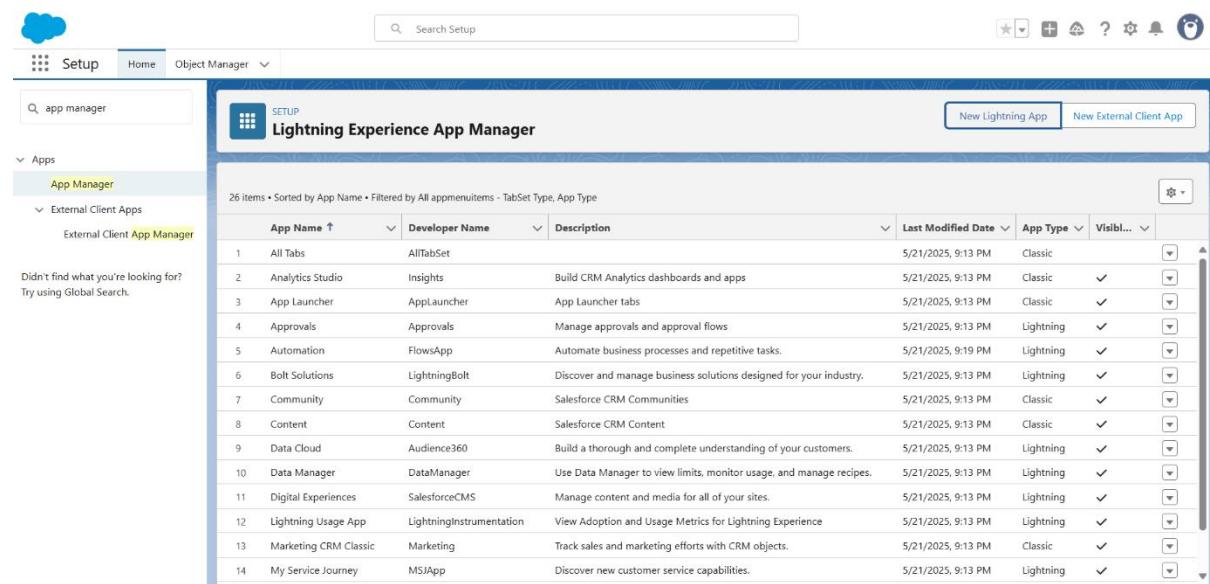
The Lightning App

An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps gives users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

Lightning apps let you brand your apps with a custom color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your org can work more efficiently by easily switching between apps.

Use Case:

Well done you have reached close to your requirement by creating the objects to store the organisation's data. Making a database for an organisation is just not enough to reach out the requirements, the task is how the users at the organisation can access the objects you have created for them. As an Admin for the organisation it's your duty to make sure every user of the organisation is able to access the data modelling structure.



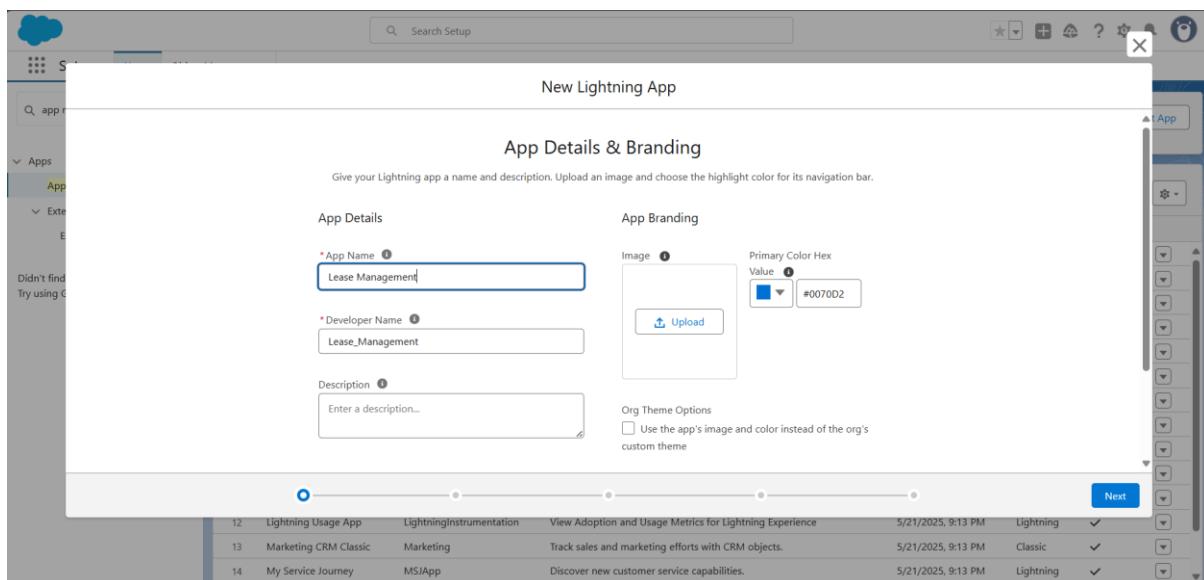
The screenshot shows the Salesforce App Manager interface. At the top, there's a search bar labeled "Search Setup". Below the header, a sidebar on the left lists "Setup", "Home", and "Object Manager". Under "Apps", the "App Manager" section is selected, showing "External Client Apps" and "External Client App Manager". A message says "Didn't find what you're looking for? Try using Global Search." The main content area is titled "Lightning Experience App Manager" and displays a table of 26 items. The table has columns for "App Name", "Developer Name", "Description", "Last Modified Date", "App Type", and "Visibility". The table lists various apps like All Tabs, Analytics Studio, App Launcher, Approvals, Automation, Bolt Solutions, Community, Content, Data Cloud, Data Manager, Digital Experiences, Lightning Usage App, Marketing CRM Classic, and My Service Journey, along with their respective developer names and descriptions.

App Name ↑	Developer Name	Description	Last Modified Date	App Type	Visibility
1 All Tabs	AllTabSet	Build CRM Analytics dashboards and apps	5/21/2025, 9:13 PM	Classic	✓
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	5/21/2025, 9:13 PM	Classic	✓
3 App Launcher	AppLauncher	App Launcher tabs	5/21/2025, 9:13 PM	Classic	✓
4 Approvals	Approvals	Manage approvals and approval flows	5/21/2025, 9:13 PM	Lightning	✓
5 Automation	FlowsApp	Automate business processes and repetitive tasks.	5/21/2025, 9:19 PM	Lightning	✓
6 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	5/21/2025, 9:13 PM	Lightning	✓
7 Community	Community	Salesforce CRM Communities	5/21/2025, 9:13 PM	Classic	✓
8 Content	Content	Salesforce CRM Content	5/21/2025, 9:13 PM	Classic	✓
9 Data Cloud	Audience360	Build a thorough and complete understanding of your customers.	5/21/2025, 9:13 PM	Lightning	✓
10 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	5/21/2025, 9:13 PM	Lightning	✓
11 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	5/21/2025, 9:13 PM	Lightning	✓
12 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	5/21/2025, 9:13 PM	Lightning	✓
13 Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	5/21/2025, 9:13 PM	Classic	✓
14 My Service Journey	MSIApp	Discover new customer service capabilities.	5/21/2025, 9:13 PM	Lightning	✓

Create A Lightning App

To create a lightning app page

1. Go to setup page >> search "app manager in quick find >> select app manager >> click on New lighting App.



2. Fill the app name in app details and branding as follow

App Name: Lease Management

Developer Namee: This will auto populated

Image: optional (if you want to give any image you can otherwise not mandatory)

Primary colour hex value: keep this default

3. Then click Next >> (App option page Set Navigation Style as Standard Navigation >> Next (Utility Items) keep it as default >> Next.

5. To Add Navigation Items:

Search for the item in the (Payment for tenant, Tenants, property, lease) from the search bar and move it using the arrow button? Next? Next.

6. To Add User Profiles.

UI CONFIGURATION

Fields

When we talk about Salesforce, Fields represent the data stored in the columns of a relational database. It can also hold any valuable information that you require for a specific object. Hence, the overall searching, deletion, and editing of the records become simpler and quicker.

Types of Fields

1. Standard Fields
2. Custom Fields

Standard Fields:

As the name suggests, the Standard Fields are the predefined fields in Salesforce that perform a standard task. The main point is that you can't simply delete a Standard Field until it is a non-required standard field. Otherwise, users have the option to delete them at any point from the application freely. Moreover, we have some fields that you will find common in every Salesforce application. They are,

>>Created By
>>Owner
>>Last Modified
>>Fcid Made During object Creation

Custom Fields:

On the other side of the coin, Custom Fields are highly flexible, and users can change them according to requirements. Moreover, each organization or company can use them if necessary. It means you need not always include them in the records, unlike Standard fields. Hence, the final decision depends on the user, and he can add/remove Custom Fields of any given form.

The screenshot shows the Salesforce Object Manager interface for the 'property' object. The left sidebar contains navigation links such as Details, Fields & Relationships (highlighted with a red arrow), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Custom Layouts, Field Sets, Object Links, Record Types, Related Lookup Filters, Record Layouts, List View Button Layout, and Record Restriction Rules. The main content area is titled 'Fields & Relationships' and displays a table of fields. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. A red arrow points to the 'New' button at the top right of the table header. The table data is as follows:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__r	Long Text Area(32768)		
Created By	CreatedBy	Lookup(Item)		
Last Modified By	LastModifiedBy	Lookup(Item)		
Name	Name__c	Text(25)		
Owner	OwnerId	Lookup(User-Group)		
property Name	Name	Text(25)		
ref	ref__r	Text(10)		
Type	Type__c	Picklist		

Creation Of Fields For The Property Object

To create fields in an object:

1. Go to setup >>click on Object Manager>>type object name(property) in search bar >>click on the object

The screenshot shows the Salesforce Object Manager interface. At the top, there's a search bar with 'property' typed into it. Below the search bar, the title 'Object Manager' is displayed, followed by '1 Items. Sorted by Label'. A table lists the object details:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Property	Property__c	Custom Object		6/16/2025	✓

2. Now click on “Fields & Relationships” >> New

The screenshot shows the 'Fields & Relationships' section for the 'Property' object. On the left, there's a sidebar with various options like Details, Page Layouts, Lightning Record Pages, etc. The 'Fields & Relationships' option is selected. The main area displays a table of existing fields:

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)	✓	
Property Name	Name	Text(80)		✓

3.Select Data Type as "Text"

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. In the 'Property' screen, the 'Fields & Relationships' section is active. A list of data types is displayed, with 'Text' being the selected option. The 'Text' option is highlighted with a blue border. To the right of the list, detailed descriptions for each data type are provided.

Data Type	Description
Date	Allows users to enter a date or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
Date/Time	Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
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 location. 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 up to 255 characters on separate lines.
Text Area	Allows users to enter up to 131,072 characters on separate lines.
Text Area (Long)	Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
Text Area (Rich)	Allows users to enter any combination of letters and numbers and store them in encrypted form.
Text (Encrypted)	Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.
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.

4.Click on next

- Field Label: Name
- Field Name: gets auto generated
- Length: 25
- Required check box
- Click on Next >> Next > Save and new.

The screenshot shows the 'New Custom Field' configuration screen in the Salesforce Setup interface. The 'Step 2. Enter the details' section is active. The 'Field Label' is set to 'Name'. The 'Length' is set to 25. The 'Required' checkbox is checked. Other fields like 'Field Name', 'Description', 'Help Text', and various validation options are also visible.

The screenshot shows the Salesforce Setup interface under the Object Manager. A sidebar on the left lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main area is titled 'Property New Custom Field'. It's Step 4 of 4, titled 'Add to page layouts'. The field details are: Field Label: Name, Data Type: Text, Field Name: Name. Below this, it says 'Select the page layouts that should include this field.' There is a checkbox for 'Property Layout' which is checked. At the bottom, there are buttons for Previous, Save & New, Save, and Cancel.

2. To create another fields in an object:

1. Go to setup >> click on Object Manager >> type object name (property) in search bar click on the object
2. Now click on "Fields & Relationships">>>New
3. Select Data type as a "Long Text" and Click on Next
4. Fill the Above as following:
 - Field Label: Address
 - Field Name: gets auto generated
 - Click on Next >> Next > Save and new

The screenshot shows the Salesforce Setup interface under the Object Manager. A sidebar on the left lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main area is titled 'Property' and Step 2 of 4, titled 'Enter the details'. The field details are: Field Label: Address, Length: 32,768, # Visible Lines: 3, Field Name: Address, Description: (empty), Help Text: (empty). There is a checkbox for 'Auto add to custom report type' which is checked. At the bottom, there is a 'Default Value' section with a 'Show Formula Editor' button. The formula editor instructions say: 'Use formula syntax: Enclose text and picklist values in double quotes ("The_WithValue"), include numbers without quotes (12), show percentages as decimal (.10), and express date calculations in the standard format (Today) + 7. To reference a field from a Custom Metadata type record use \$CustomMetadata.Type__Name__Field__Value'.

SETUP > OBJECT MANAGER

Property

Fields & Relationships

Step 4. Add to page layouts

Field Label: Address
 Data Type: Long Text Area
 Field Name: Address
 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
 Property 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

- To create another fields in an object:

5. Go to setup >> click on Object Manager type object name(property) in search bar click on the object.

6.

Now click on "Fields & Relationships New"

SETUP > OBJECT MANAGER

Property

Fields & Relationships

Date
 Date/Time
 Email
 Geolocation
 Number
 Percent
 Phone
 Picklist
 Picklist (Multi-Select)
 Text
 Text Area
 Text Area (Long)
 Text Area (Rich)
 Text (Encrypted)
 Time
 URL

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

7. Select Data type as a "picklist and Click on Next

8. Fill the Above as following

- Field Label: Type
 - Field Name gets auto generated
 - Enter values, with each value separated by a new line
 - Enter these values
- 1BHK
 2BHK
 3BHK
- Click on Next >> Next >> Save and new.

Property New Custom Field

Step 2. Enter the details Step 2 of 4

Field Label: Type

Values:

- Use global picklist value set
- Enter values, with each value separated by a new line

1B-HK
2B-HK
3B-HM

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: Type

Description:

Property New Custom Field

Step 4. Add to page layouts Step 4 of 4

Field Label: Type

Data Type: Picklist

Field Name: Type

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

Property Layout

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

To create another fields in an object:

9. Go to setup >> click on Object Manager >> type object name (property) in search bar >> click on the object.
10. Now click on "Fields & Relationships" >> New
11. Select Data type as a Text" and Click on Next

The screenshot shows the Salesforce Setup interface. At the top, there's a blue header bar with the Salesforce logo, a search bar labeled "Search Setup", and various navigation icons. Below the header, the main menu shows "Setup > OBJECT MANAGER". The page title is "Property" and the sub-page title is "New Custom Field".

The left sidebar lists several options under "Fields & Relationships": Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout.

The main content area is titled "Step 2. Enter the details" and is labeled "Step 2 of 4". It contains fields for "Field Label" (set to "sqft"), "Length" (set to "18"), "Field Name" (set to "sqft"), and "Description" (empty). There are also sections for "Help Text" (empty) and "Required" (unchecked), "Unique" (unchecked), and a radio button for "Treat 'ABC' and 'abc' as duplicate values (case insensitive)" which is selected.

12. Fill the Above as following:

Field Name: sqft

Field Name: gets auto generate

- **Length:** 18
- Click on Next >> Next >> Save

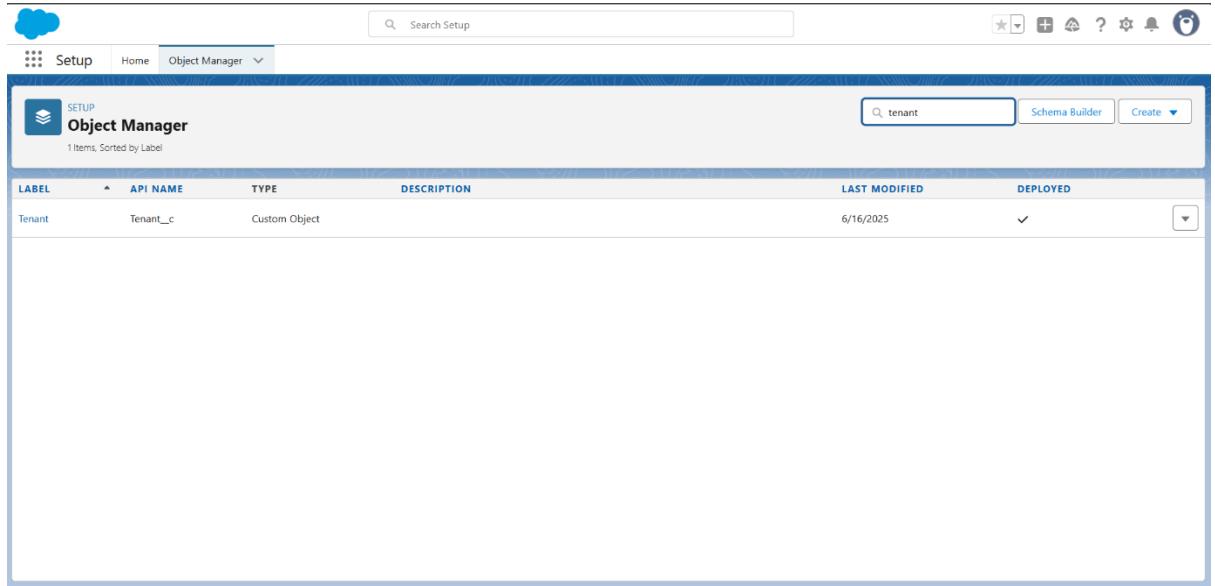
The screenshot shows the continuation of the custom field creation process. The page title is "Property" and the sub-page title is "New Custom Field".

The left sidebar remains the same, listing "Fields & Relationships" and other setup options.

The main content area is titled "Step 4. Add to page layouts" and is labeled "Step 4 of 4". It displays the field details: "Field Label: sqft", "Data Type: Text", "Field Name: sqft", and "Description: ". A note 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." Below this, there's a table with two rows: "Add Field" (checkbox checked) and "Page Layout Name" (checkbox checked, with "Property Layout" selected). At the bottom, a note says: "When finished, click Save & New to create more custom fields, or click Save if you are done." Navigation buttons at the bottom right include "Previous", "Save & New", "Save", and "Cancel".

Creation Of Fields For The Tenant Object

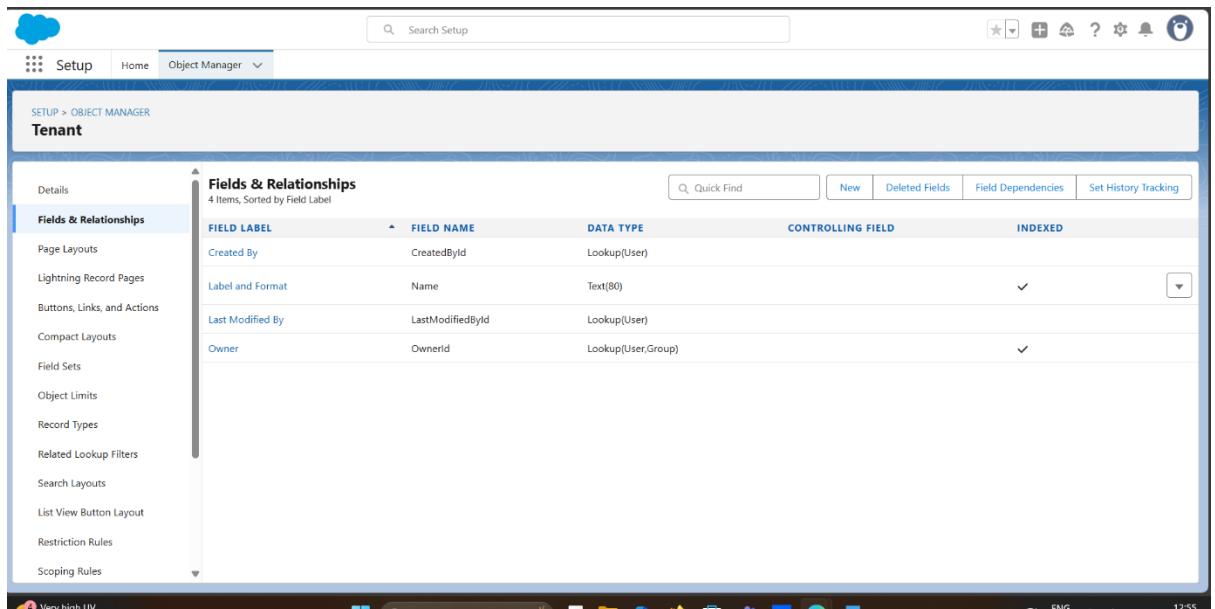
1. Go to setup click on Object Manager >> type object name[Tenant] in search bar >> click on the object.



The screenshot shows the Salesforce Object Manager interface. The search bar at the top contains the text "tenant". A table below lists one item: "Tenant" with API Name "Tenant__c" and Type "Custom Object". The last modified date is 6/16/2025 and the deployment status is checked.

Label	API Name	Type	Description	Last Modified	Deployed
Tenant	Tenant__c	Custom Object		6/16/2025	✓

2. Now click on "Fields & Relationships" >> New



The screenshot shows the "Fields & Relationships" section for the Tenant object. It displays four fields: Created By, Label and Format, Last Modified By, and Owner. The "Owner" field is highlighted. The "Fields & Relationships" sidebar includes options like 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, and Scoping Rules.

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)		✓

3. Select Data type as a "Email" and Click on Next

4. Fill the Above as following:

Field Label: Email

SETUP > OBJECT MANAGER
Tenant

Fields & Relationships

- Details
- 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

Field Type	Description
Date	Allows users to enter a date or pick a date from a popup calendar.
Date/Time	Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
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 255 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) <i>i</i>	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**

Field Name: gets auto generated

Click on required check box

Click on Next Next>> Save and new.

SETUP > OBJECT MANAGER
Tenant

Fields & Relationships

- Details
- 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

Tenant
New Custom Field

Step 4. Add to page layouts

Step 4 of 4

Field Label: Email
Data Type: Email
Field Name: Email
Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.
To change the location of this field on the page, you will need to customize the page layout.

Add Field Page Layout Name
 Tenant Layout

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

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

To create another fields in an object:

1. Go to setup >> click on Object Manager type object name(Tenant) search bar click on the object

SETUP > OBJECT MANAGER

Property

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)		✓
Property Name	Name	Text(80)		✓

2. Now click an "Fields & Relationships">> New
3. Select Data type as a "phone" and Click on New

SETUP > OBJECT MANAGER

Tenant

FIELD TYPE	DESCRIPTION
Currency	Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
Date	Allows users to enter a date or pick a date from a popup calendar.
Date/Time	Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
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 255 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 "14:40:59:600" 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.

4. Fill the Above as following:

Field Label: Phone

Field Name: gets auto generated

Click on Next >> Next >> Save and 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

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

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
 Tenant Layout

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

Previous Save & New Save Cancel

To create another fields in an object:

5. Go to setup click on Object Manager type object name[Tenant) in search bar>> click on the object.

6. Now click on "Fields & Relationships" >>New

7. Select Data type as a "picklist and Click on Next

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

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

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

Date/Time: Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the 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 (Long): Allows users to enter up to 255 characters on separate lines.

Text Area (Rich): Allows users to enter 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", 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

8. Fill the Above as following:

- Field Label: status
- Field Name: gets auto generated
- Enter values, with each value separated by a new line
- Enter these values

Stay

Leaving

The screenshot shows the Salesforce Setup interface for creating a new custom field. The left sidebar is titled 'Fields & Relationships' and includes options like 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, and Scoping Rules. The main area is titled 'New Custom Field' under 'Step 2. Enter the details'. The 'Field Label' is set to 'status'. Under 'Values', the radio button 'Enter values, with each value separated by a new line' is selected, and the text 'Stay' and 'Leaving' is entered into the text area. Other options shown include 'Display values alphabetically, not in the order entered', 'Use first value as default value', and 'Restrict picklist to the values defined in the value set'. The 'Field Name' is also set to 'status'. The right side of the screen shows navigation buttons for 'Previous', 'Next', and 'Cancel'.

- Click on Next >> Next >> Save
-

The screenshot shows the Salesforce Setup interface for adding the 'status' field to page layouts. The left sidebar is identical to the previous screenshot. The main area is titled 'Step 4. Add to page layouts' under 'Step 4 of 4'. It displays the field details: Field Label 'status', Data Type 'Picklist', Field Name 'status', and Description empty. Below this, 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 is a checkbox 'Add Field' followed by a dropdown menu 'Page Layout Name' containing 'Tenant Layout'. At the bottom, there is a note 'When finished, click Save & New to create more custom fields, or click Save if you are done.' and a row of buttons for 'Previous', 'Save & New', 'Save', and 'Cancel'.

Creation Of Fields For The Lease Object

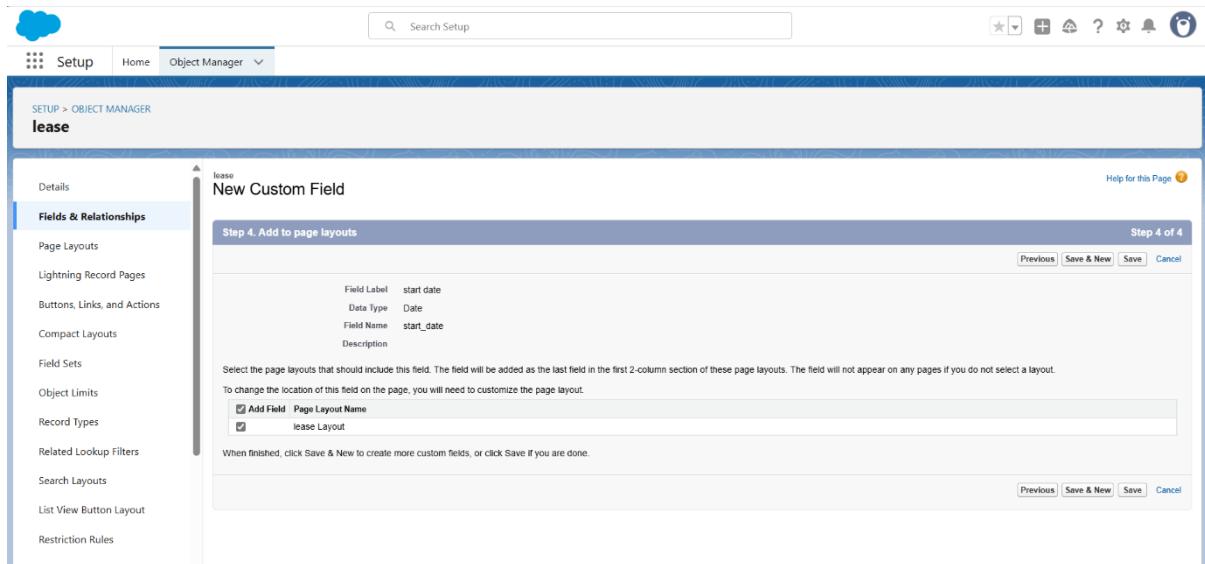
1. Go to setup click on Object Manager type object name(Lease) in search bar >> click on the object.

The screenshot shows the Salesforce Object Manager interface. At the top, there's a search bar with 'Lease' typed into it. Below the search bar, the 'Object Manager' tab is selected. A table lists one object: 'lease' with API name 'lease__c', Type 'Custom Object', Last Modified on '6/16/2025', and Deployed status checked. The table has columns for Label, API Name, Type, Description, Last Modified, and Deployed.

2. Now click on "Fields & Relationships">> New
3. Select Data type as a "Date" and Click on Next

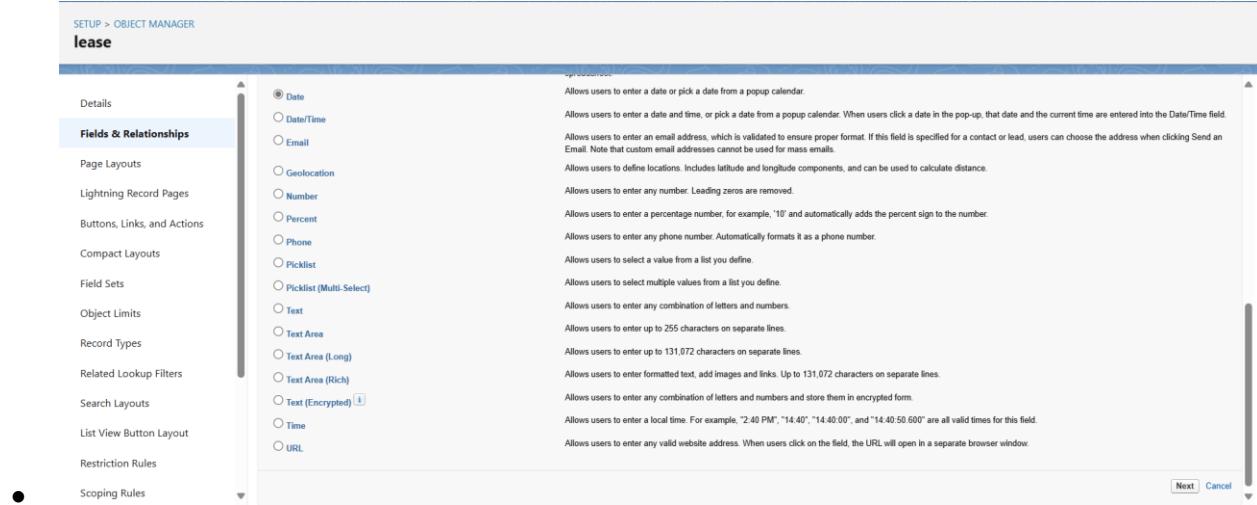
The screenshot shows the 'Fields & Relationships' configuration screen for the 'Lease' object. On the left, a sidebar lists various setup options like Details, Page Layouts, Lightning Record Pages, etc. The 'Fields & Relationships' option is selected. On the right, a list of field types is shown with 'Date' selected. A detailed description of the Date field is provided, stating it allows users to enter a date or pick a date from a popup calendar. Other field types listed include Date/Time, Email, Geolocation, Number, Percent, Phone, Picklist, Picklist (Multi-Select), Text, Text Area, Text Area (Long), Text Area (Rich), Text (Encrypted), Time, and URL. At the bottom right, there are 'Next' and 'Cancel' buttons.

4. Fill the Above as following
 - Field Label: start date
 - Field Name : gets auto generated
 - Click on Next >> Next >> Save and new.



To create another fields in an object:

1. Go to setup click on Object Manager type object name (Lease) in search bar click on the object.
2. how click on 'Fields & Relationships New'
3. Select Data type as a "Date" and Click on Next



4. Fill in the Above as following:

- Field Label: End date
- Field Name: gets auto generated
- Click on Next >> Next Save >> and new

Creation Of Fields For The Payment For Tenant Object

1. Go to setup >> click on Object Manager >> type object name Payment for tenant in search bar >> click on the object.
2. Now click on "Fields & Relationships" >>> New

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)		✓

2. Select Data type as a "Date" and Click on Next

4. Fill the Above as following

- Field Label: Payment date
- Field Name: gets auto generated
- Click on Next >> Next >> Save and new

To create another fields in an object:

1. Go to setup click on Object Manager >> type object name (Payment for tenant!) in search bar click on the object
2. Now click on "Fields & Relationships>> New"

SETUP > OBJECT MANAGER
Payment for tenantat

Fields & Relationships
4 Items, Sorted by Field Label

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)		✓

3. Select Data type as a "Number and Click on Next"

4. Fill the Above as following

SETUP > OBJECT MANAGER
Payment for tenantat

Fields & Relationships

Date	Allows users to enter a date or pick a date from a popup calendar.
Date/Time	Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
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 255 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) <small>(1)</small>	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.

- Field Label: Amount
- Length: 18
- Field Name: gets auto generated
- Click on Next >> Next >> Save and new.

SETUP > OBJECT MANAGER
Payment for tenantat

Fields & Relationships

Step 2. Enter the details

Field Label: **Amount**

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

Unique: Do not allow duplicate values

External ID: Set this field as the unique record identifier from an external system

Step 4 of 4

Step 4. Add to page layouts

Field Label: **Amount**

Data Type: **Number**

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.

Step 4 of 4

To create another fields in an object.

- 1.Go to setup >> click on Object Manager >> type object name(Payment for tenant) in search bar >> click on the object.
2. Now click on "Fields & Relationships">>>> New

Setup Home Object Manager

SETUP > OBJECT MANAGER
Payment for tenantat

Fields & Relationships

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)		✓

- 3. Select Data type as a "picklist and Click on Next

The screenshot shows the 'Object Manager' setup page for a custom object named 'Payment for tenantat'. The 'Fields & Relationships' tab is selected. On the left, a sidebar lists various field types: Date, Date/Time, Email, Geolocation, Number, Percent, Phone, Picklist (selected), Picklist (Multi-Select), Text, Text Area, Text Area (Long), Text Area (Rich), Text (Encrypted), Time, and URL. The 'Picklist' option is highlighted with a red circle. To the right, detailed descriptions for each field type are provided. At the bottom right of the main area are 'Next' and 'Cancel' buttons.

4. Fill the Above as following:

- Field Label: check for payment
- Field Name: gets auto generated
- Enter values, with each value separated by a new line
- Enter these values
Paid
Not paid
- Click on Next >> Next >> Save and new.

The screenshot shows the 'Object Manager' setup page for the 'Payment for tenantat' object. A new custom field is being created, titled 'New Custom Field'. The 'Fields & Relationships' tab is selected. The 'Field Label' is set to 'check for payment'. Under 'Values', the 'Enter values, with each value separated by a new line' option is selected, and the values 'Paid' and 'Not paid' are entered into the text area. Several checkboxes are available for configuring the picklist behavior: 'Display values alphabetically, not in the order entered', 'Use first value as default value', and 'Restrict picklist to the values defined in the value set' (which is checked). The 'Field Name' is set to 'check_for_payment' and the 'Description' is left blank. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar. The bottom right corner shows 'Step 2 of 4' with 'Previous', 'Next', and 'Cancel' buttons.

Creation Of Lookup Fields

Creation of Lookup Field on Lease Object:

1. Go to setup click on Object Manager>> type object name Lease) in the search bar >> click on the object.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes a search bar labeled "Search Setup", a user icon, and various navigation links like "Home" and "Object Manager". The main area is titled "SETUP > OBJECT MANAGER" and shows the "lease" object details. On the left, a sidebar lists options such as 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, and Scoping Rules. The "Fields & Relationships" option is selected. A modal window titled "New Custom Field" is open, specifically "Step 1. Choose the field type". It asks to "Specify the type of information that the custom field will contain." Under "Data Type", the "Lookup Relationship" option is selected. A detailed description of "Lookup Relationship" is provided, mentioning it creates a relationship between the current object and another object, allowing users to select values from a lookup list. Other options like "None Selected", "Auto Number", "Formula", and "Roll-Up Summary" are also listed. The "Next" button is visible at the bottom right of the modal.

2. Now click on "Fields & Relationships" >> New
3. Select lookup relationship
- 4. Select the related object" property" and click next.

The screenshot shows the continuation of the setup process. The modal window is now titled "New Relationship" and is on "Step 2. Choose the related object". It asks to "Select the other object to which this object is related". A dropdown menu labeled "Related To" contains the value "Property". The "Next" button is visible at the bottom right of the modal.

5. Field Name: property
6. Field label: Auto generated

- 7. Next > Next > Save

SETUP > OBJECT MANAGER
lease

Fields & Relationships

New Relationship

Step 3. Enter the label and name for the lookup field Step 3 of 6

Field Label	Property
Field Name	Property
Description	
Help Text	
Child Relationship Name	lease
Required	<input type="checkbox"/> Always require a value in this field in order to save a record <input checked="" type="radio"/> Clear the value of this field. You can't choose this option if you make this field required. <input type="checkbox"/> Don't allow deletion of the lookup record that's part of a lookup relationship.

SETUP > OBJECT MANAGER
lease

Fields & Relationships

New Relationship

Step 6. Add custom related lists Step 6 of 6

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

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

Creation of Lookup Field on Payment Object:

8.Go to setup >> click on Object Manager type object name (payment) in the search bar click on the object.

- 9. Now click on "Fields & Relationships >> New"

The screenshot shows the Salesforce Object Manager interface for the 'Payment' object. The left sidebar lists various setup categories like Page Layouts, Lightning Record Pages, etc. The main content area is titled 'Fields & Relationships' and shows a table of existing fields. The columns are 'FIELD LABEL', 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED'. Fields listed include Account, Amount, Audit Email, Balance, Cancellation Date, Cancellation Effective Date, Cancellation Gateway Date, Cancellation Gateway Reference Number, Cancellation Gateway Result Code, Cancellation Salesforce Result Code, Comments, and Created By.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Account	AccountId	Lookup(Account)		
Amount	Amount	Currency(16, 2)		
Audit Email	Email	Email		
Balance	Balance	Currency(16, 2)		
Cancellation Date	CancellationDate	Date/Time		
Cancellation Effective Date	CancellationEffectiveDate	Date/Time		
Cancellation Gateway Date	CancellationGatewayDate	Date/Time		
Cancellation Gateway Reference Number	CancellationGatewayRefNumber	Text(255)		
Cancellation Gateway Result Code	CancellationGatewayResultCode	Text(64)		
Cancellation Salesforce Result Code	CancellationSfResultCode	Text(64)		
Comments	Comments	Text Area(1000)		
Created By	CreatedBy	Lookup(User)		✓

- 10. Select lookup relationship

The screenshot shows the 'New Custom Field' creation wizard for the 'Payment' object. The left sidebar has 'Fields & Relationships' selected. The main area is titled 'Step 1. Choose the field type'. It asks to specify the type of information. A 'Data Type' section shows several options: 'None Selected' (selected), 'Auto Number', 'Formula', 'Roll-Up Summary', 'Lookup Relationship' (selected), 'External Lookup Relationship', 'Checkbox', and 'Currency'. Each option has a detailed description below it.

Step 1. Choose the field type	Step 1
Specify the type of information that the custom field will contain.	Next Cancel
Data Type	Help for this Page
<input checked="" type="radio"/> None Selected	Select one of the data types below.
<input type="radio"/> Auto Number	A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
<input type="radio"/> 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.
<input type="radio"/> 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.
<input checked="" type="radio"/> 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.
<input type="radio"/> External Lookup Relationship	Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
<input type="radio"/> Checkbox	Allows users to select a True (checked) or False (unchecked) value.
<input type="radio"/> 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 application.

- 11. Select the related object " Tenant" and click next.

The screenshot shows the Salesforce Setup interface for creating a new relationship. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main area is titled 'Payment New Relationship' and is on 'Step 2. Choose the related object'. A dropdown menu shows 'Related To' set to 'Tenant'. Navigation buttons at the bottom include 'Previous', 'Next', and 'Cancel'.

12. Field Name: Tenant

13. Field label: Auto generated

- 14. Next >> Next >> Save.

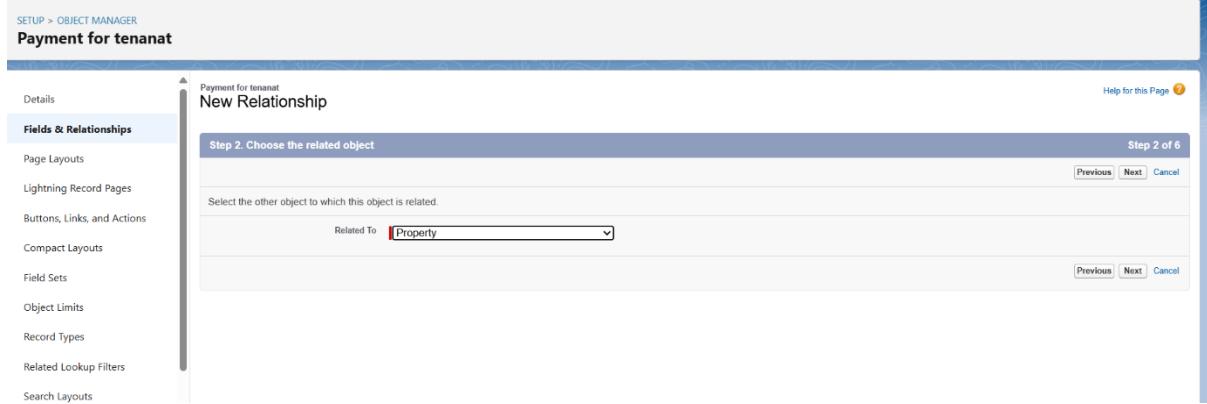
The screenshot shows the final step of adding a custom related list for the Payment object. It's titled 'Step 6 of 6'. The configuration includes:

- Field Label: Tenant
- Data Type: Lookup
- Field Name: Tenant
- Related List Label: Payments
- Add Related List: Page Layout Name - Tenant Layout (checkbox checked)
- Append related list to users' existing personal customizations (checkbox checked)

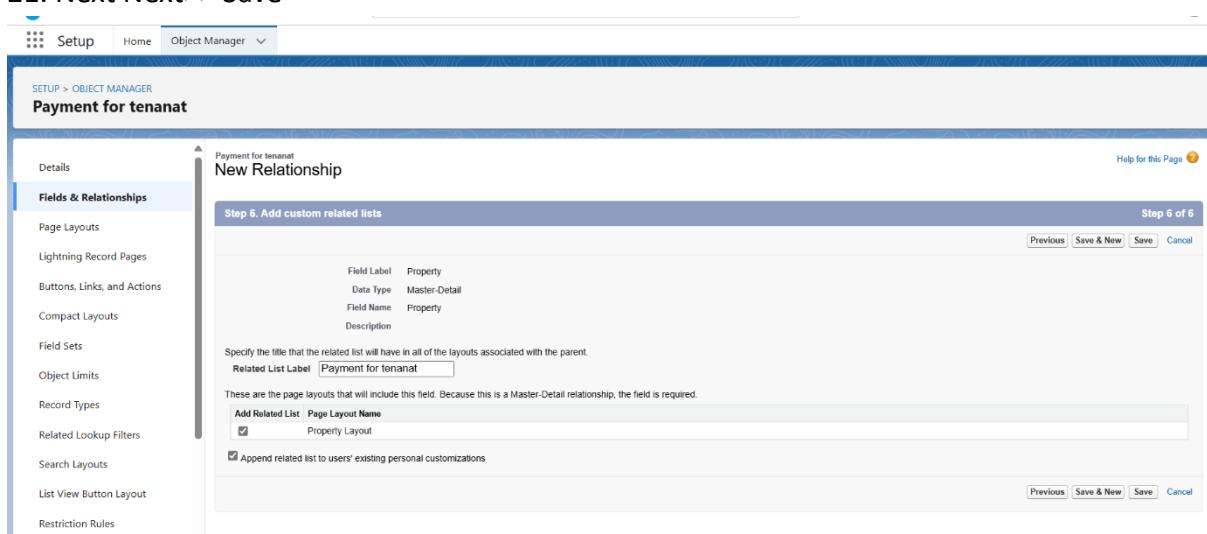
 Navigation buttons at the bottom include 'Previous', 'Save & New', 'Save', and 'Cancel'.

Creation of Lookup Field on Payment for tenant Object:

15. Go to setup>> click on Object Manager >> type object name (property) in the search bar >> click on the object.
16. Now click on "Fields & Relationships" >> New
17. Select masterdetail relationship
- 18. Select the related object" property and click next



19. Field Name: property
20. Field label: Auto generated
- 21. Next Next>> Save



REPORTS AND DASHBOARDS

Validation Rule

- Validation rules are applied when a user tries to save a record and are used to check if the data meets specified criteria. If the criteria are not met, the validation rule triggers an error message and prevents the user from saving the record until the issues are resolved.

The screenshot shows the Salesforce Setup interface. In the top navigation bar, there's a cloud icon, a search bar labeled 'Search Setup', and several global buttons. Below the header, the path 'SETUP > OBJECT MANAGER' is shown, followed by 'lease'. On the left, a sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The main content area is titled 'Validation Rules' and displays a table with one row: 'No items to display.'

- To Create A Validation Rule To An Lease Object

- Go to the setup page >> click on object manager From drop down click edit for Lease object.
- Click on the validation rule >> click New.
- Enter the Rule name as lease_end_date".
- Insert the Error Condition Formula as:

- End_date_c > start_date_c

The screenshot shows the 'Validation Rule Edit' screen. At the top, it says 'Validation Rule Edit' with 'Save', 'Save & New', and 'Cancel' buttons. The 'Rule Name' field is filled with 'lease_end_date'. The 'Active' checkbox is checked. The 'Description' field is empty. Below that is the 'Error Condition Formula' section. It includes an example 'Discount_Percent_c>0.30' and a link to 'More Examples'. It also says 'Display an error if Discount is more than 30%'. A note states 'If this formula expression is true, display the text defined in the Error Message area'. The formula input field shows 'End_date_c > start_date_c'. To the right, there's a 'Functions' sidebar with categories like ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN, etc., and a 'Quick Tips' sidebar with 'Operators & Functions'.

- 5. Enter the Error Message as "Your End date must be greater than start date", select the Error location as Field and select the field as "start date", and click Save.

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

Display an error if Discount is more than 30%

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

Insert Field **Insert Operator** **End_date_c > start_date_c**

Check Syntax No errors found

Error Message

Example: **Discount percent cannot exceed 30%**

This message will appear when Error Condition formula is **true**

Error Message: **Your End date must be greater than start date**

This error message can either appear at the top of the page or below a specific field on the page

Error Location: Top of Page Field **start date**

Save **Save & New** **Cancel**

SETUP **Object Manager**

lease Validation Rule Back to lease Help for this Page

Validation Rule Detail		Edit Clone	
Rule Name	lease_end_date		Active <input checked="" type="checkbox"/>
Error Condition Formula	End_date_c > start_date_c		Error Location start date
Error Message	Your End date must be greater than start date		
Description			
Created By	SRAVYA.GOKADA, 6/17/2025, 1:03 AM		Modified By SRAVYA.GOKADA 6/17/2025, 1:03 AM
Edit Clone			

DOCUMENT GENERATION

Email Templates

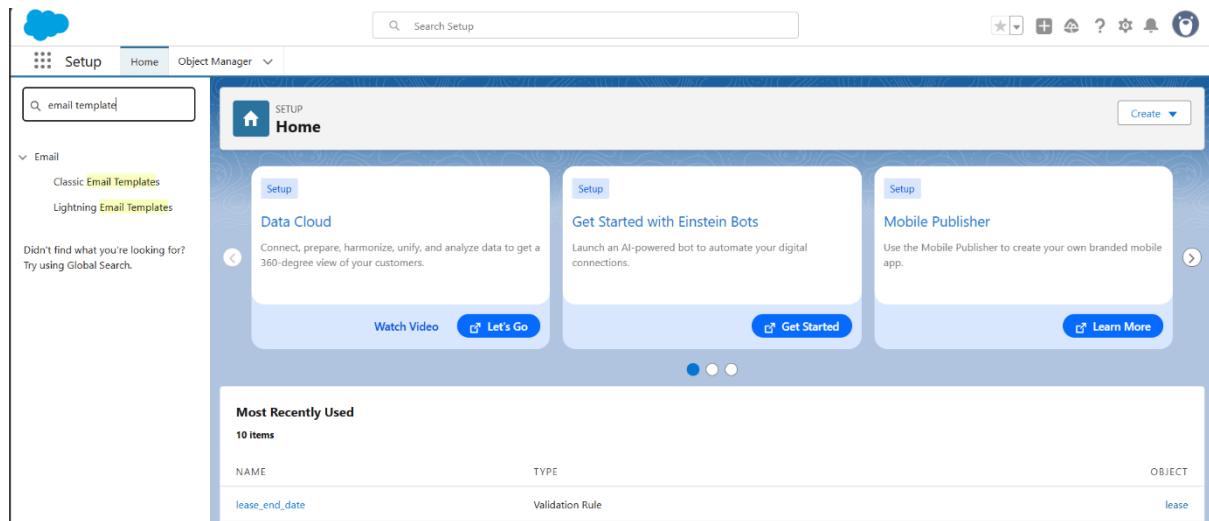
We use email templates to increase productivity and ensure consistent messaging. Email templates with merge fields let you quickly send emails that include field data from Salesforce records like contacts, leads, or opportunities. You can use email templates when emailing groups of people with list email or mass email-or just one person. Salesforce email templates are the easiest way to get your emails done. They help you create and send quick emails that include merge fields from Salesforce records like Contacts, Leads, Opportunities, or Custom Objects

When you have a large number of contacts or leads in Salesforce, it can be difficult to keep track of who needs to be notified about new information. Salesforce email templates allow you to combine all these contacts or leads into one email and then send it out simultaneously.

Create Email Template For Tenant Leaving

To create Email Template:

1. Go to setup in quick find box enter email template
- Email Template >> click on classic



2. Click on New Email Template> Choose text

Folder: Untiled public Classic Email templates

Click on available for use

- 3. Email Template Name is "tenant leaving"

4. Template Unique Name: Auto populated

5. Subject:"request for approve the leave"

6. Email body:

Dear {!Tenant_c.CreatedBy}.

Please approve my leave.

- 7.Save

The screenshot shows the Salesforce Setup interface with the following details:

Classic Email Templates

Email Template Name	Untitled Public Classic Email Templates	Available For Use
Email Template Name	Tenant Email	✓
Template Unique Name	Tenant_Email	Last Used Date
Encoding	Unicode (UTF-8)	Times Used
Author	SRAVYA GOKADA [Change]	
Description		
Created By	SRAVYA GOKADA, 6/17/2025, 1:17 AM	Modified By
		SRAVYA GOKADA, 6/17/2025, 1:17 AM

Email Template

Plain Text Preview

```
Subject: Urgent: Monthly Rent Payment Reminder

Dear {Tenant__c.Name}.

I trust this email finds you well. We appreciate your continued tenancy at our property and I hope you have been comfortable in your residence.

This communication is a friendly reminder regarding your monthly rent payment, which is currently outstanding. As outlined in our rental agreement, the payment is due. To ensure the smooth operation of our property management and to avoid any inconvenience, we kindly request you to settle the payment at your earliest convenience.
```

Create Email Template For Leave Approved

To create Email Template:

1. Go to setup in quick find box enter email template'>> click on classic

Email Template.

2. Click on >> New Email Template====> Choose text

Folder: Unfiled public Classic Email templates

Click on available for use

3. Email Template Name is "Leave approved"

4. Template Unique Name: Auto populated

5. Subject: Leave approved?

6. Email body:

dear {!Tenant_c.Name},

I hope this message finds you well. I am writing to inform you that I have received your email confirming the approval of my leave request. I would like to express my gratitude for considering and approving my time off

- your leave is approved, you can leave now

The screenshot shows the Salesforce Setup interface with the following details:

Email Template Detail

Email Templates from Salesforce	Unfiled Public Classic Email Templates
Email Template Name	Leave approved
Template Unique Name	Leave_approved
Encoding	Unicode (UTF-8)
Author	SRAVYA GOKADA [Change]
Description	
Created By	SRAVYA GOKADA, 6/17/2025, 1:12 AM
Modified By	SRAVYA GOKADA, 6/22/2025, 1:26 AM

Email Template

Subject: Your Leave Request Has Been Approved

Plain Text Preview:

```
dear {!Tenant__c.Email};

I hope this message finds you well. I am writing to inform you that I have received your email confirming the approval of my leave request. I would like to express my gratitude for considering and approving my time off.

your leave is approved. You can leave now
```

7. Save

Create Email Template For Rejection For Leave

To create Email Template:

1. Go to setup in quick find box enter ernail template >> click on classic

Email Template.

2. Click on New Email Template ChooSO TEXE

Folder: Unfiled public Classic Email templates

Click on available for use

3. Email Template Name is Leave rejected
4. Template Unique Name: Auto populated
5. Subject: Leave rejected
6. Email body:

Dear{! Tenant c.Name}.

I hope this email finds you well Your contract has not ended. So we can't approve your leave your leave has rejected

- 7. Save

The screenshot shows the Salesforce Setup interface for managing Email Templates. The left sidebar navigation includes 'Email' (selected), 'Classic Email Templates' (highlighted), 'Classic Letterheads', 'Custom Code', 'Apex Classes', and 'Data Classification'. The main content area displays the 'Email Template Detail' for 'Leave rejected1'. The template is 'Available For Use' (checked). The 'Email Template Name' is 'Leave rejected1', 'Template Unique Name' is 'Leave_rejected1', 'Encoding' is 'Unicode (UTF-8)', and 'Author' is 'SRAVYA GOKADA [Change]'. The 'Description' field contains the message 'I hope this email finds you well. Your contract has not ended. So we can't approve your leave your leave has rejected'. The 'Created By' and 'Modified By' fields show 'SRAVYA GOKADA' with dates '6/17/2025, 1:14 AM' and '6/20/2025, 5:36 AM' respectively. Below the detail view is a 'Plain Text Preview' which shows the same message. The browser address bar shows the URL: <https://orgfarm-71e75fd7db-dev-ed.develop.lightning.force.com/lightning/setup/CommunicationTemplatesEmail/page?address=%2F00XgK000002IPV3%3Fset...>.

Create Email Template For Monthly Payment

To create Email Template:

1. Go to setup in quick find box enter email template >> click on classic Email Template.

2. Click on New Email Template Choose text

Folder: Unfiled public Classic Email templates

Click on available for use

3. Email Template Name is "Tenant Email"

4. Template Unique Name: Auto populated

5. Subject: Urgent Monthly Rent Payment Reminder

6. Email body:

Dear Tenant c.Name),

I trust this email finds you well. We appreciate your continued tenancy at our property and I hope you have been comfortable in your residence,

This communication is a friendly reminder regarding your monthly rent payment, which is currently outstanding. As outlined in our rental agreement, the payment is due. To ensure the smooth operation of our property management and to avoid any inconvenience, we kindly request

7. Save

The screenshot shows the Salesforce Setup interface with the following details:

- Search Bar:** Search Setup
- Left Navigation:** Home, Object Manager, Setup (selected)
- Search Results:** Email Templates from Salesforce (Untitled Public Classic Email Templates) and Lightning Email Templates.
- New Email Template Record:**
 - Name:** Tenant Email
 - Unique Name:** Tenant_Email
 - Encoding:** Unicode (UTF-8)
 - Author:** SRavya Gokada [Changed]
 - Created By:** SRavya Gokada, 6/17/2025, 1:17 AM
 - Modified By:** SRavya Gokada, 6/17/2025, 1:17 AM
 - Available For Use:** Checked
 - Last Used Date:** Not specified
 - Times Used:** Not specified
- Email Template Body:**

Subject: Urgent: Monthly Rent Payment Reminder

Plain Text Preview:

```
Dear {Tenant_c_Name}.

I trust this email finds you well. We appreciate your continued tenancy at our property and I hope you have been comfortable in your residence.

This communication is a friendly reminder regarding your monthly rent payment, which is currently outstanding. As outlined in our rental agreement, the payment is due. To ensure the smooth operation of our property management and to avoid any inconvenience, we kindly request you to settle the payment at your earliest convenience.
```

Create Email Template For Successful Payment

To create Email Template:

1. Go to setup in quick find box enter email template >> click on classic Email Template.

2. Click on New Email Template>Choose text

Folder: Unfiled public Classic Email templates

Click on available for use

3. Email Template Name is "tenant payment"

4. Template Unique Name: Auto populated

5. Subject: Confirmation of Successful Monthly Payment

6. Email body :

Dear(Tenant_c.Email_c)

We hope this email finds you well. We are writing to inform you that we have successfully received your monthly payment. Thank you for your prompt and diligent payment and Save

The screenshot shows the Salesforce Setup interface for creating a new email template. At the top, there's a header with a mail icon and the text 'SETUP' and 'Classic Email Templates'. Below the header, there's a sub-header 'Email Template Edit' with buttons for 'Save', 'Save & New', and 'Cancel'. The main area is titled 'Email Template Information'.

The form fields include:

- Select Field Type:** Contact Fields
- Select Field:** (empty dropdown)
- Copy Merge Field Value:** (empty text input)
- Folder:** Unfiled Public Classic Email Templates
- Available For Use:** checked
- Email Template Name:** tenant payment
- Template Unique Name:** tenant_payment
- Encoding:** Unicode (UTF-8)
- Description:** (empty text input)
- Subject:** Confirmation of Successful Monthly Payment
- Email Body:** (rich text area containing the email content)

The rich text area contains the following content:

```
Dear {Tenant_c.Email_c},  
  
We hope this email finds you well. We are writing to inform you that we have  
successfully received your monthly payment. Thank you for your prompt and  
diligent payment.
```

At the bottom of the form, there are three buttons: 'Save', 'Save & New', and 'Cancel'.

SECURITY AND PERMISSIONS

Approval Process

What Is Approval Process In Salesforce?

The Approval Process is an automated process that an org uses to approve records in Salesforce. For example, When In the organization, someone is not able to decide a particular thing then he can ask someone else for approval. So, for such frequent cases or situations, one can define the approval process. So, Users can take benefit of such an approval process whenever needed.

Records submitted for approval are approved by the user(s) in the organization. These users are called Approvers. A single Approval process is bound to a single object because when a rule is defined, this object influences the fields that will be available to set the criteria.

An approval process consists of finalizing the basic properties of the approval process (as shown in the below image), approval steps, and actions to be executed.

Actions in Salesforce Approval Process

There are 4 actions present except the approval steps which complete an approval process, following are:

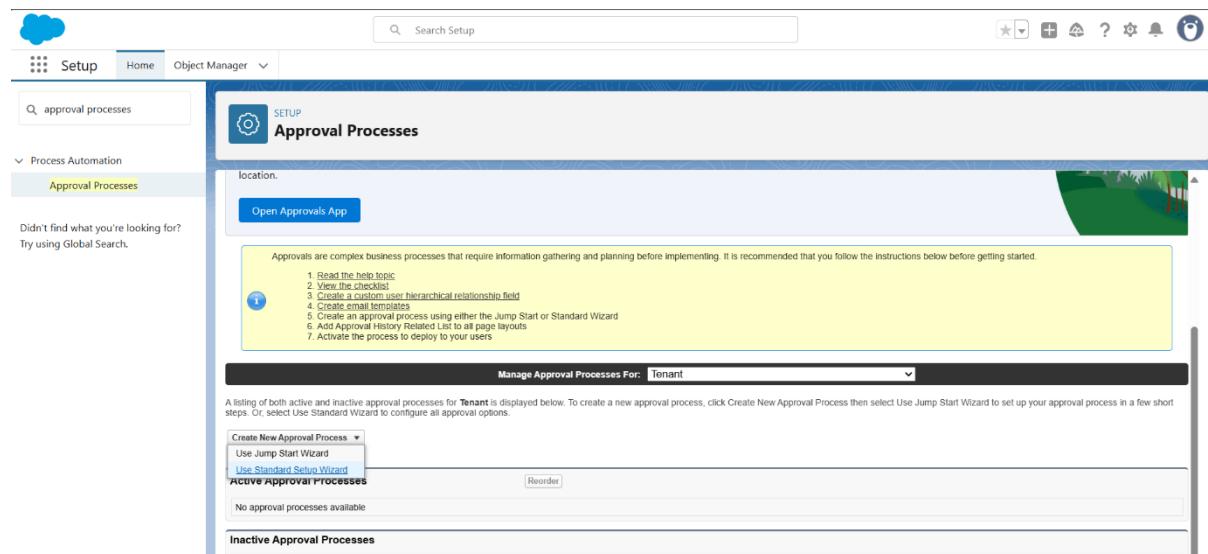
1. Initial Submission Actions

Initial submission actions are the actions that occur when a user first submits a record for approval. By default, an action to lock the record runs automatically on initial submission. Initial submission actions can include any approval actions such as email , field updates , takes , or outboard messages

Create Approval Process For Check For Vacant

To create fields in an object:

1. Go to setup >> Approval Processes in quick find bar>>click on it.



2. Manage Approval Process For >> "Tenant" from the drop down.

3. Click on "Create New Approval Process" >>> Use standard setup wizard.

4. Process Name "check for vacant" >> Click Next.

5. Field "Tenant:status" >> Operator: Not equals, Value >> Click on the lookup filter icon and select "Leaving".

6. Click insert field, then click Next

A screenshot of the 'New Approval Process' wizard, Step 1 of 6. The title is 'Step 1. Enter Name and Description'. It says 'Enter a name and description for your new approval process.' There is a 'Help for this Page' link. The form fields are: 'Enter Name and Description' with 'Process Name' set to 'check for vacant' and 'Unique Name' set to 'check_for_vacant'. A note says 'I = Required Information'. The 'Description' field is empty. At the bottom are 'Next' and 'Cancel' buttons.

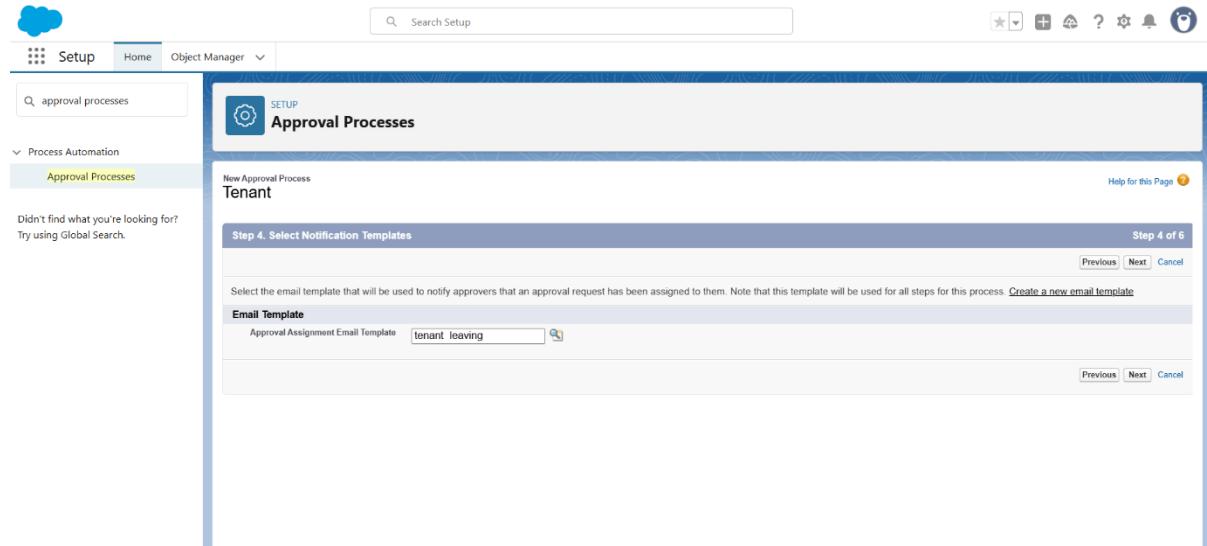
The screenshot shows the Salesforce Approval Process Wizard. On the left, a 'Lookup' interface allows selecting values from a picklist. On the right, the 'Approval Processes' page displays the current step: 'Step 2: Set Approval Criteria'. A table shows the logic: 'Tenant status not equal to Leaving' with an AND operator.

Field	Operator	Value	Logic
Tenant status	not equal to	Leaving	AND
-None-	-None-		AND
-None-	-None-		AND
-None-	-None-		

7. Next Autornated Approver determined by "None" from the drop down.
8. Select the "Administrators ONLY can edit records during the approval process". Then Next.

The screenshot shows the Salesforce Setup interface, specifically the 'Approval Processes' wizard. Step 3 is titled 'Specify Approver Field and Record Editability Properties'. It includes sections for 'Select Field Used for Automated Approval Routing' (set to 'None') and 'Record Editability Properties' (set to 'Administrators ONLY can edit records during the approval process').

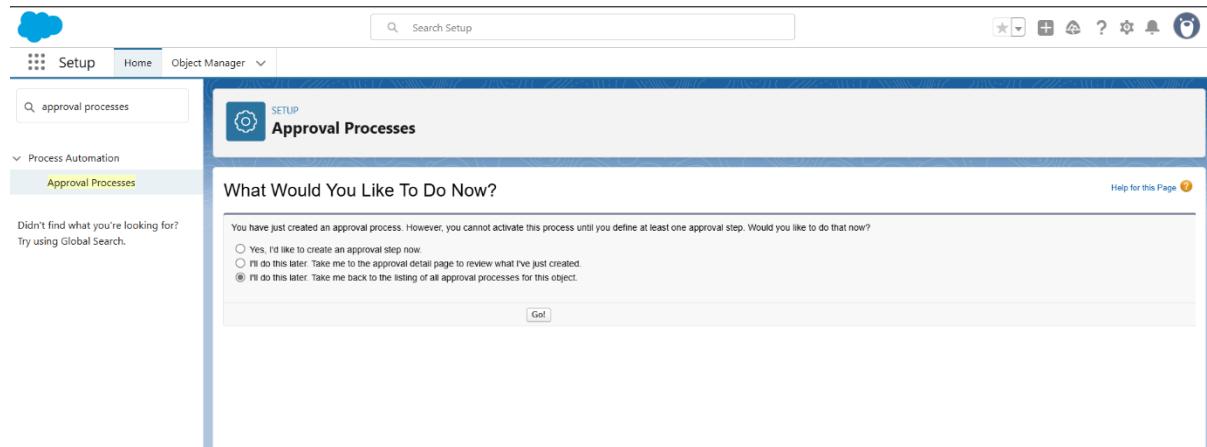
10.From the available fields select >> Tenant Name, and then add >>Add it to the selected. Then Next. Make sure Display approver history is checked.



- And under security settings check the "Allow approvers to access the approval page only from within the Salesforce application. (Recommended)" option.

11.Submitter type Search>>Owner, Allowed Submitters>>Property Owner. Then Next.

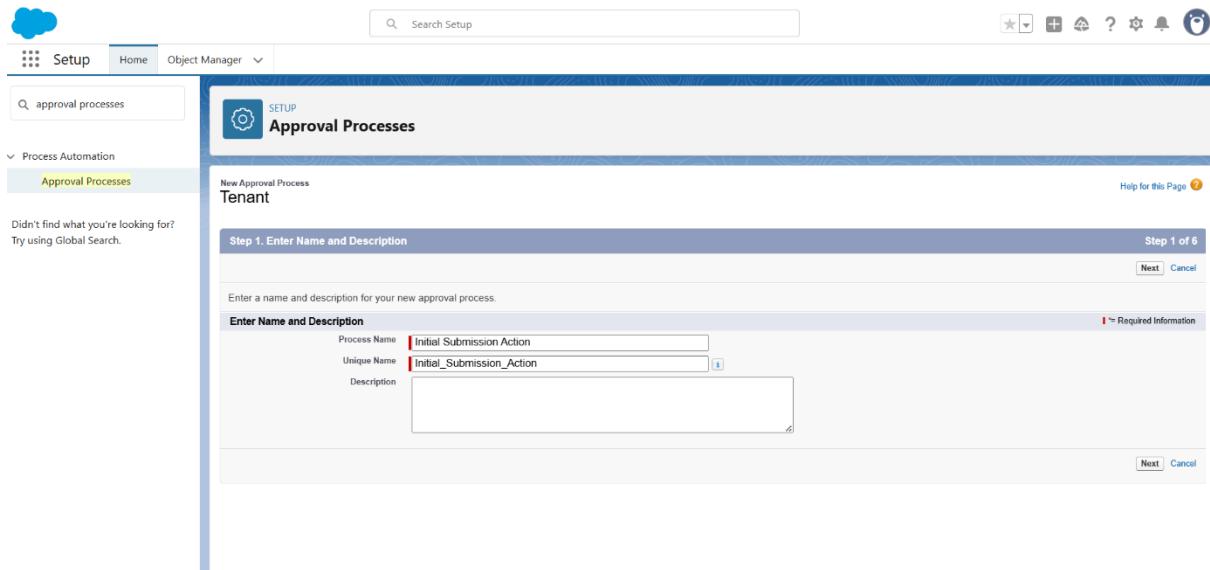
Then click save.



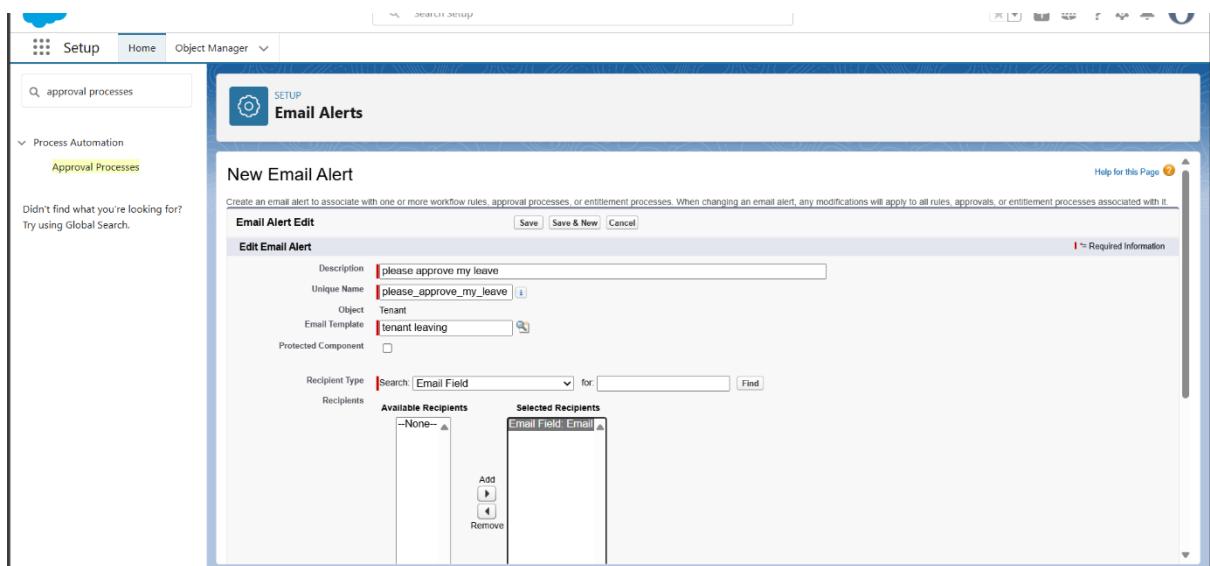
- Click on "i'll do this later. Take me back to the listing of all approval process for this object"
- Click go

Initial Submission Action:

1. Under initial submission action click on add new and then select email alert.



2. Description: "please approve my leave".
3. unique name: auto populated
4. Email template: tenant leaving
5. Recipient type: Email field
6. Available Recipients: Email field: Email



7. From Email address: Current user's email

8. Click save

Final Approval Action

1. Under Final approval action click on new and then select email alert.
2. Description: "Tenant leaving".
3. unique name: auto populated
4. Email template: Leave approved
5. Recipient type: Email field
6. Available Recipients: Email field: Email
7. From Email address: Current user's email
8. Click save

Action	Type	Description
Record Lock	Email Alert	please approve my leave

Approval Steps [1] [New Approval Step](#)

You have not yet defined any approval steps

Final Approval Actions [1] [Add Existing](#) [Add New](#)

Action	Type	Description
Record Lock	Email Alert	Tenant leaving

Final Rejection Actions [1] [Add Existing](#) [Add New](#)

Action	Type	Description
Record Lock	Email Alert	your request for leave is rejected

Recall Actions [1] [Add Existing](#) [Add New](#)

Action	Type	Description
Record Lock		Unlock the record for editing

Final Rejection Action

1. Under final rejection action click on add new and then select email alert.
2. Description: "your request for leave is rejected".
3. unique name: auto populated
4. Email template: leave rejected
5. Recipient type: Email field
6. Available Recipients: Email field: Email

7. From Email address: Current user's email an save.

The screenshot shows the Salesforce Setup interface. On the left, the navigation bar includes 'Setup' (highlighted), 'Home', and 'Object Manager'. The search bar at the top has 'appr' typed into it. The main content area is titled 'Email Alerts' under 'SETUP'. A sub-section titled 'Edit Email Alert' is displayed, with the title 'your request for leave is rejected'. The 'Description' field contains 'your request for leave is rejected'. The 'Unique Name' field contains 'your_request_for_leave_is_r'. The 'Object' dropdown is set to 'Tenant'. The 'Email Template' dropdown is set to 'Leave rejected1'. The 'Recipient Type' dropdown is set to 'User'. The 'Recipients' section shows a list of available recipients: 'User: Integration User', 'User: OrgFarm EPIC', 'User: Security User', and 'User: SRAVYA 12'. An 'Add' button is shown next to the available recipients list. To the right, a 'Selected Recipients' list contains 'User: SRAVYA GOKADA'. At the bottom of the 'Edit Email Alert' form are 'Save', 'Save & New', and 'Cancel' buttons. The status bar at the bottom right shows '13:45 27-06-2025'.

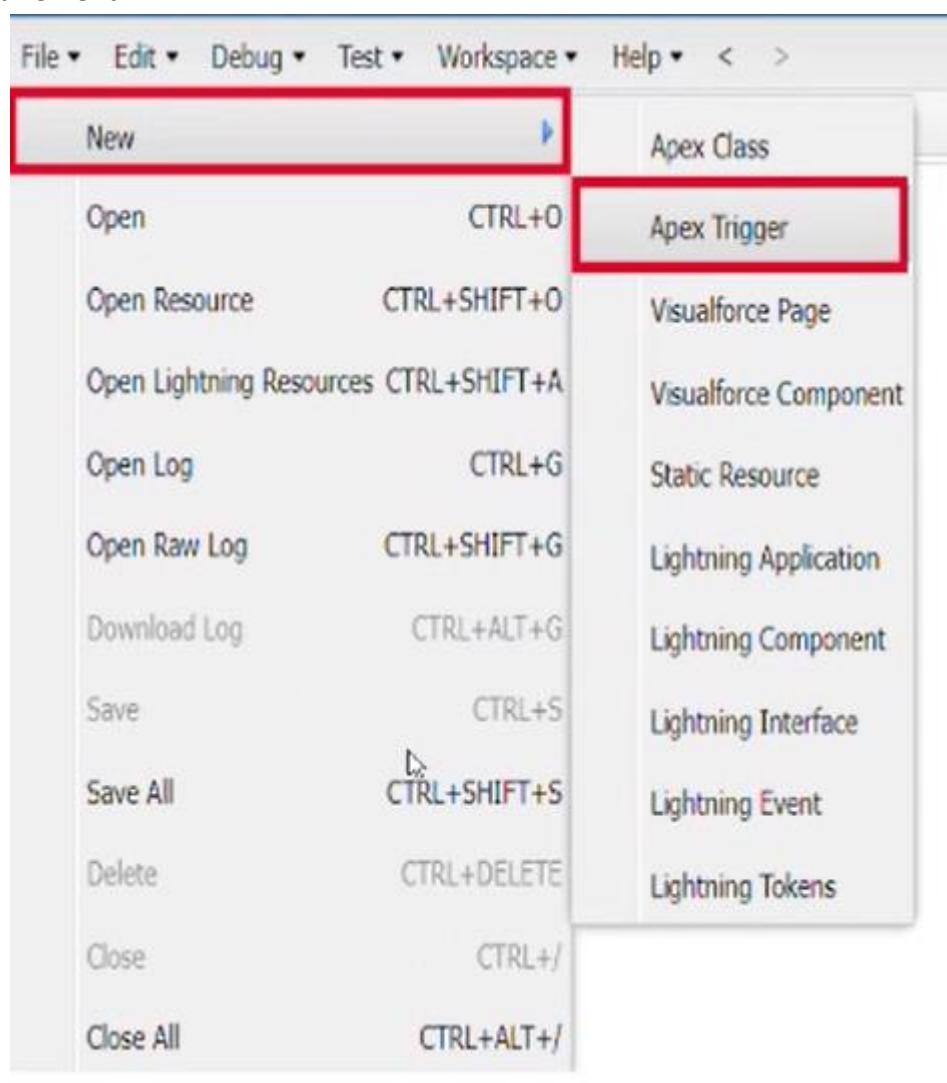
This screenshot shows the continuation of the Email Alert setup. The left sidebar remains the same. The main area now displays a list of recipient email addresses. The 'Additional Emails' field contains '22q71a0554@aletta.ac.in'. Below this, a 'From Email Address' dropdown is set to 'Current User's email address'. A checkbox labeled 'Make this address the default From email address for this object's email alerts.' is unchecked. The bottom of the screen features a standard Windows taskbar with various application icons. The status bar at the bottom right shows '13:46 27-06-2025'.

Apex Trigger

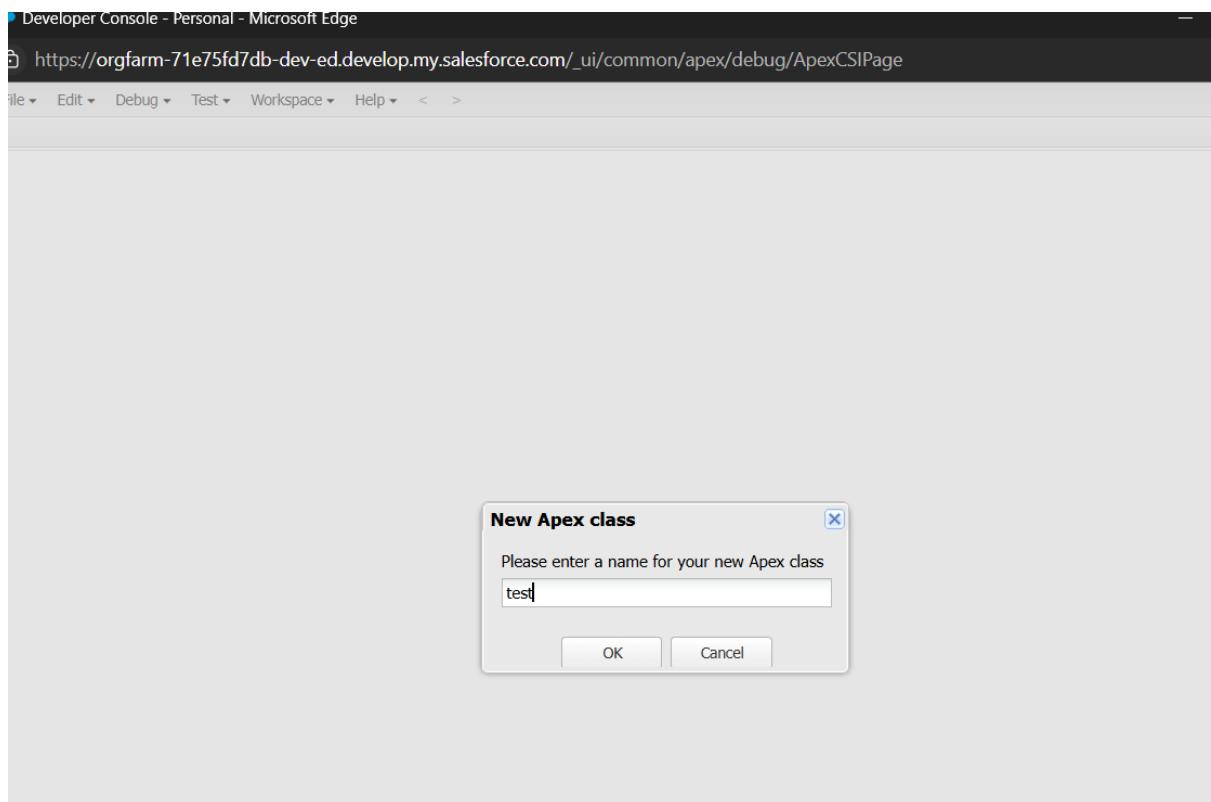
Use case:

The tenant and property are in a master-detail relationship, wherein each tenant is associated with only one property. When a tenant attempts to create a new record with an existing property, an error should be displayed, indicating that a tenant can have only one property.

Write a code to achieve this requirement using Salesforce developer skills to fulfill the Managers requirement.



2.Give the Apex Trigger name as "test", and select "Tenant_c" from the dropdown for sObject.



3.click submit

4.Now write the code logic here

Trigger Code:

trigger test on Tenant_c (before insert)

```
{  
    if(trigger.isInsert && trigger.isBefore){  
        testi landler.preventInsert(trigger.new);  
    }  
}
```

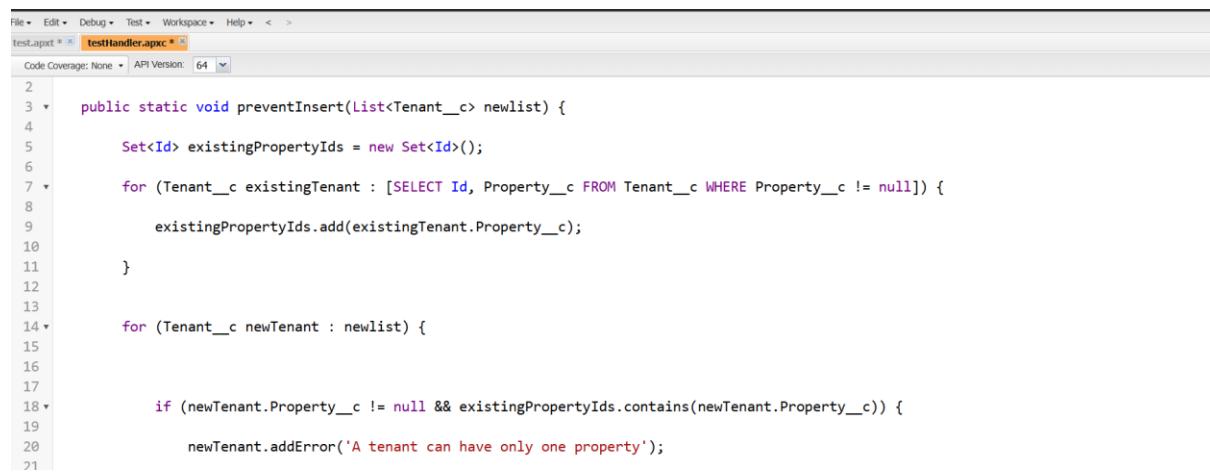
```
trigger test on Tenant__c (before insert)
{
    if(trigger.isInsert && trigger.isBefore){
        testHandler.preventInsert(trigger.new);
    }
}
```

Apex logic:

```
public class testHandler {

    public static void preventInsert(List<Tenant__c> newList) {
        Set<Id> existingPropertyIds = new Set<Id>();
        for (Tenant__c existingTenant: [SELECT ID, Property_c FROM Tenant__c WHERE Property_c != null]) {
            existingPropertyIds.add(existingTenant.Property_c);
        }

        for (Tenant__c newTenant: newList) {
            if (newTenant.Property_c != null && existingPropertyIds.contains(newTenant.Property_c)) {
                newTenantaddError('A tenant can have only one property');
            }
        }
    }
}
```



The screenshot shows a Salesforce IDE interface with a code editor window. The window title is "testhandler.apxc". The code editor displays the following Apex class:

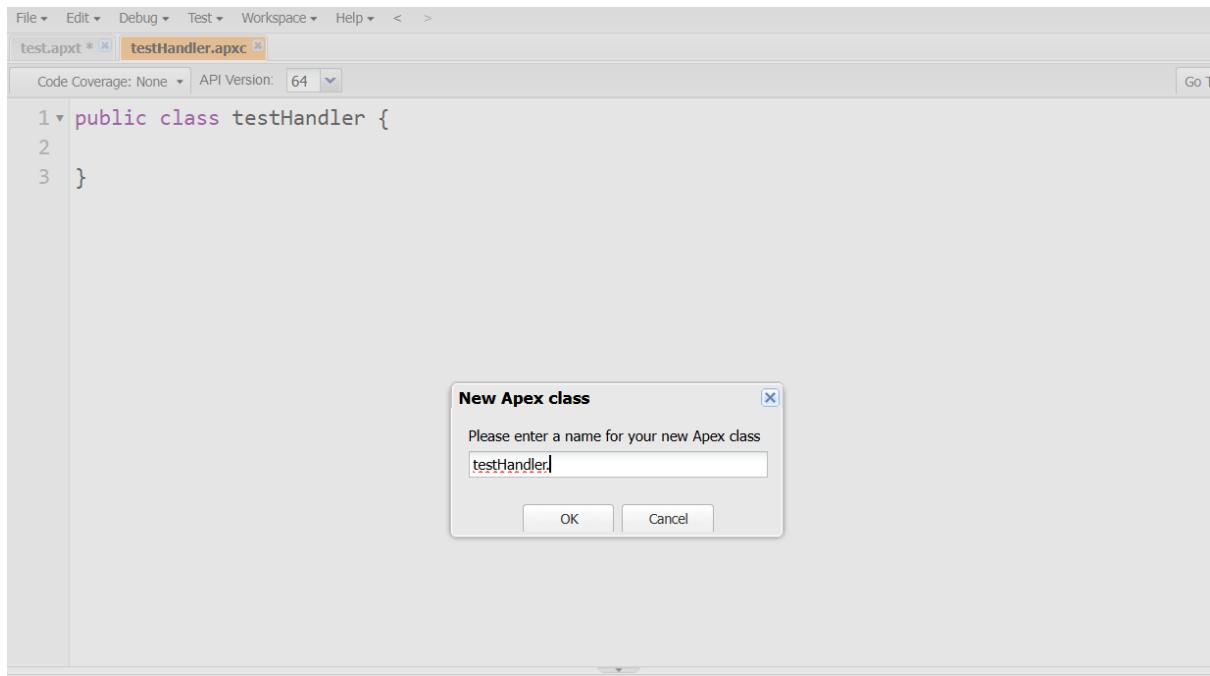
```
2
3  public static void preventInsert(List<Tenant__c> newList) {
4
5      Set<Id> existingPropertyIds = new Set<Id>();
6
7      for (Tenant__c existingTenant : [SELECT Id, Property__c FROM Tenant__c WHERE Property__c != null]) {
8
9          existingPropertyIds.add(existingTenant.Property__c);
10
11     }
12
13
14     for (Tenant__c newTenant : newList) {
15
16
17         if (newTenant.Property__c != null && existingPropertyIds.contains(newTenant.Property__c)) {
18             newTenantaddError('A tenant can have only one property');
19
20
21     }
22 }
```

Create An Apex Handler Class

To create a new Apex Class follow the below steps:

Click on the file >> New >>Apex Class.

2. Enter class name as testHandler.



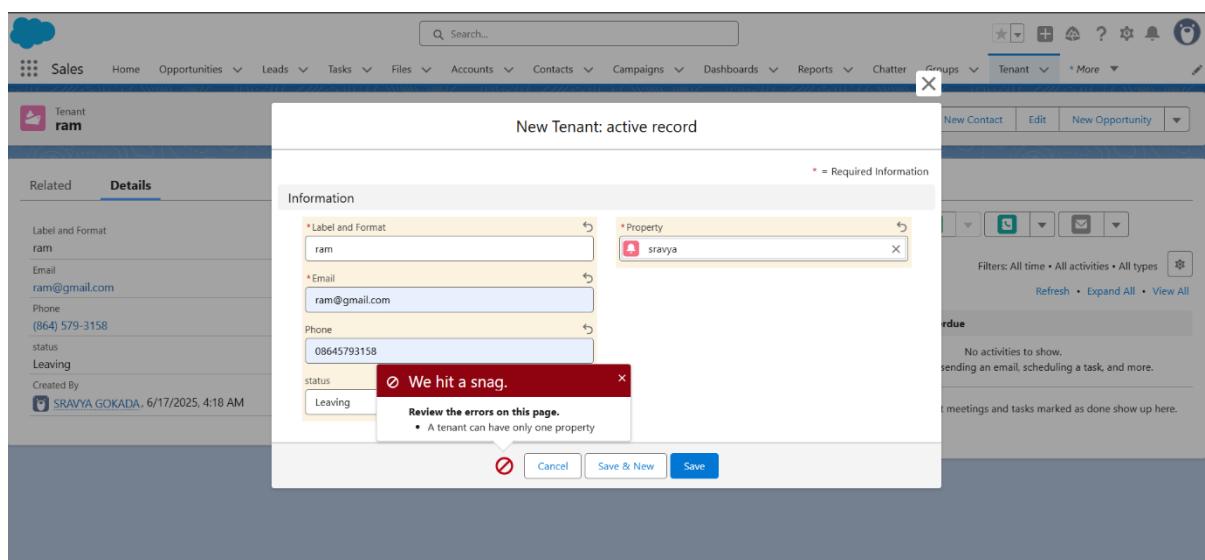
Apex logic:

```
public class testHandler  
{  
    public static void preventinsert List<Tenant> newlist)  
    Set<id> existing PropertyIds = new Set<id>;  
    for (Tenant c : existing Tenant:  
        (SELECT id, Property FROM  
        Tonant WHERE Property != null) existing PropertyIds.add(existing Tenant. Property);
```

Tonant WHERE Property != null) existing PropertyIds.add(existing Tenant. Property);

Testing the trigger

Try to create new tenant with the exiting property then it shows the error



FLOWs

What is a flow?

In Salesforce, a flow is a tool that automates complex business processes. Simply put, it collects data and then does something with that data. Flow Builder is the declarative interface used to build individual flows.

Flows fall into five categories:

Screen Flows. These are flows that have a UI element and require input from users. These types of flows are either launched as an action or embedded as an element on a Lightning page.

Schedule-Triggered Flows: These autolaunched flows launch at a specified time and frequency for each record in a batch, and they run in the background.

Autolaunched Flows: Run automated tasks with this flow type.

Autolaunched flows can be invoked from other flows (subflow), process builder, from within an Apex class, from a set schedule, from record changes, or from platform events.

Record-Triggered Flows: These autolaunched flows run in the Background either before a record save or after the record is saved when a record is created, updated, or deleted.

Platform Event-Triggered Flows: When a platform event message is received, these autolaunched flows run in the background

When and why should we use a flow

If you need to generate a new automated business process or user guided experience that does not reach the complexity threshold for Apex

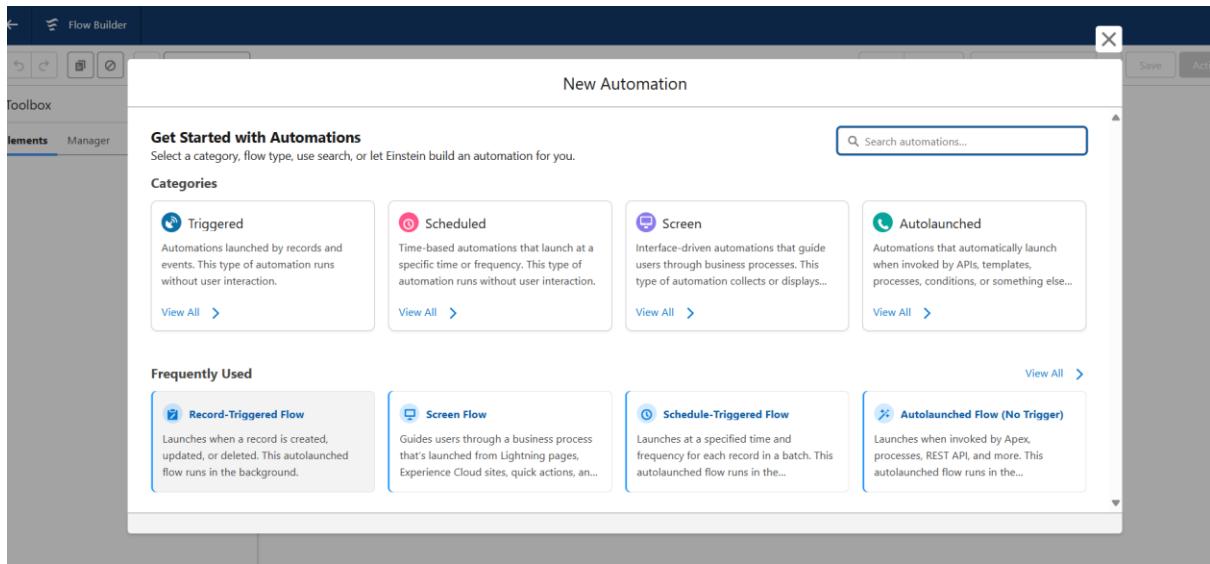
Create Flow For Monthly Payment

1. Go to setup >> type Flow in quick find box >> Click on the Flow and Select the New Flow.

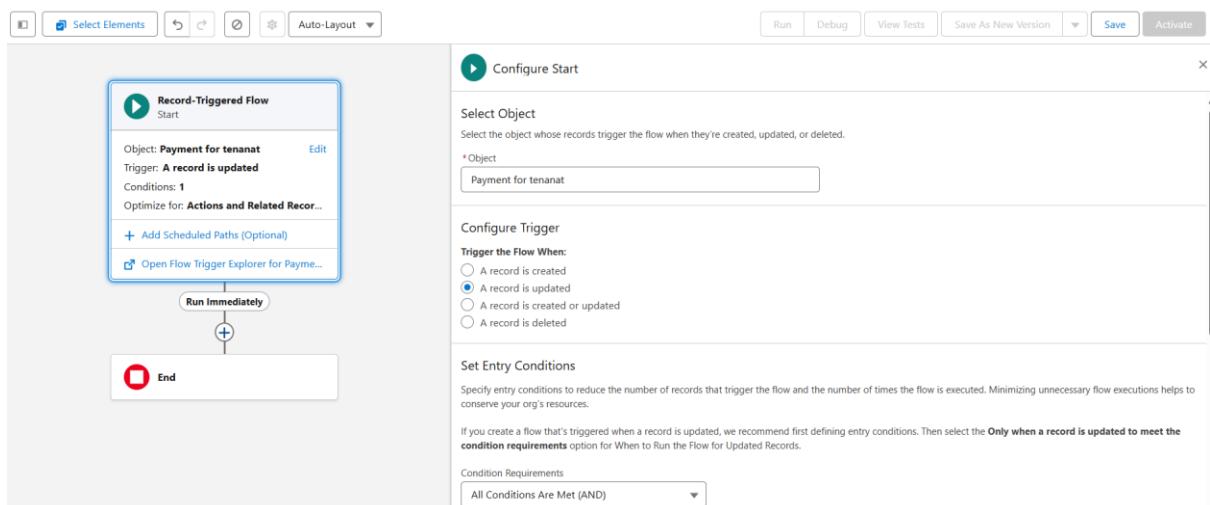
2. Select the record Triggered flow.Click on create.

The screenshot shows the Salesforce Setup Home page. On the left, the navigation sidebar is open, showing categories like Apps, Einstein, Process Automation, and Workflow Actions. Under the Flows category, 'Flows' is selected. In the center, there's a 'Setup Home' card with sections for Data Cloud, Get Started with Einstein Bots, and Mobile Publisher. Below this is a 'Most Recently Used' list with two items: 'test' (Apex Trigger) and 'testHandler' (Apex Class). At the top right of the main area, there's a 'Create' button.

The screenshot shows the 'Flows' page in the Salesforce Setup. The left sidebar has the 'Flows' category selected under 'Process Automation'. The main area displays a list of flows titled 'All Flows'. The table includes columns for 'Flow Label', 'Process Type', 'Active', 'Template', 'Package State', 'Pac...', 'Last Modified By', and 'Last Modified Date'. The table lists several flows, such as 'Add or Modify Service Appointment Attendees' (Salesforce Scheduler Flow), 'Approvals Workflow: Evaluate Approval Requests' (Screen Flow), and 'Approvals Workflow: Process Approval Submission' (Screen Flow). A 'Flow Trigger Explorer' and 'New Flow' buttons are located at the top right of the list.



3. Under Object select "Payment for tenant. Click on A record is updated



4. Set Entry Conditions

Under Condition Requirements

All Conditions are met

Field:	Operator: Equals	Value: poid
--------	------------------	-------------

check for payment_c

The screenshot shows the Flow Builder interface with a record-triggered flow named 'check for payment_c'. The flow starts with a 'Record-Triggered Flow' step for 'Payment for tenant' triggered by 'A record is updated'. It has one condition: 'check for payment' equals 'A Paid'. The flow then branches to 'Run Immediately' and ends.

Configure Start

- Field: check for payment, Operator: Equals, Value: A Paid
- When to Run the Flow for Updated Records:
 - Every time a record is updated and meets the condition requirements
 - Only when a record is updated to meet the condition requirements
- Optimize Flow:
 - Fast Field Updates: Update fields on the record that triggers the flow to run. This high-performance flow runs **before the record is saved** to the database.
 - Actions and Related Records:** Update any record and perform actions, like send an email. This more flexible flow runs **after the record is saved** to the database.
- Is this flow making an external callout or connecting to an external system?
An asynchronous path is required for flows that involve external systems.
Add Asynchronous Path

5. Click on: Every time a record is updated and meets the condition requirements

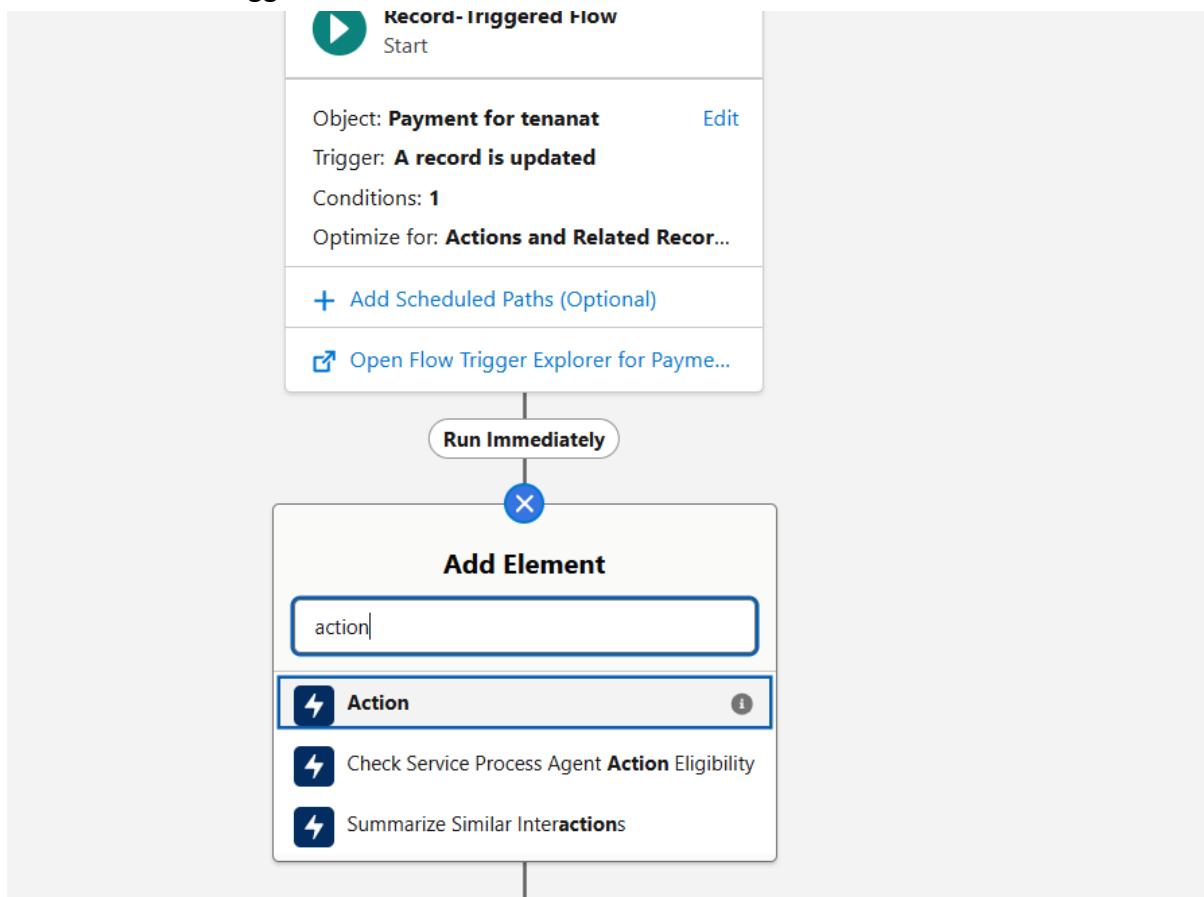
6. Click on: Actions and related records, done

The screenshot shows the Flow Builder interface with the same record-triggered flow. The 'Actions and Related Records' section is now highlighted, indicating it is selected. The flow structure remains the same: 'Run Immediately' followed by an 'Add Element' step.

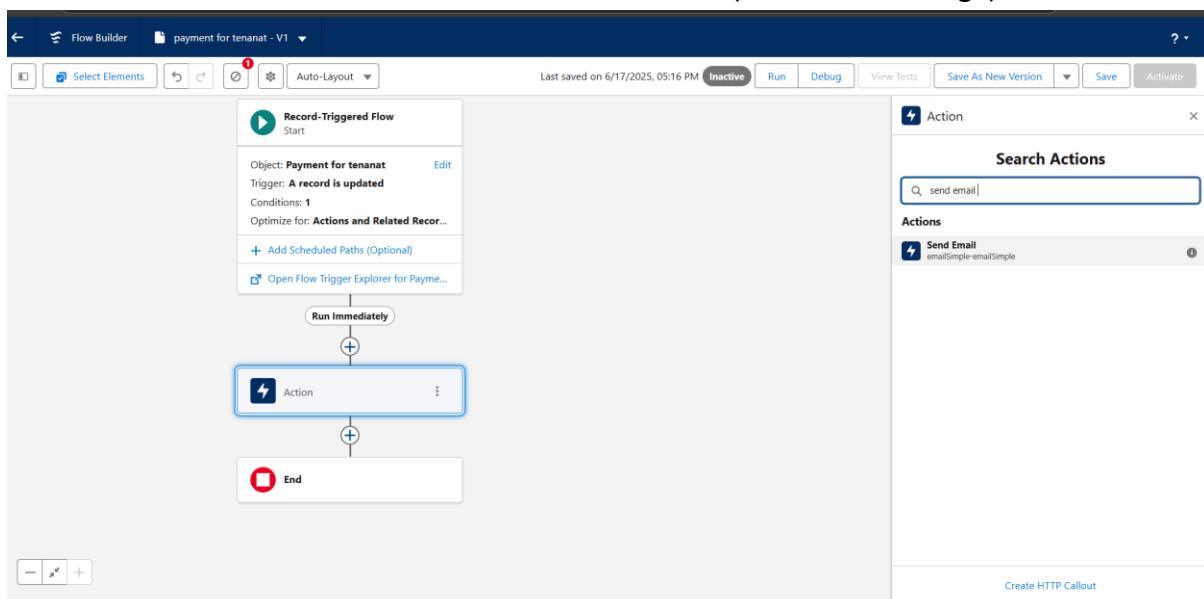
Configure Start

- Field: check for payment, Operator: Equals, Value: A Paid
- When to Run the Flow for Updated Records:
 - Every time a record is updated and meets the condition requirements
 - Only when a record is updated to meet the condition requirements
- Optimize Flow:
 - Fast Field Updates: Update fields on the record that triggers the flow to run. This high-performance flow runs **before the record is saved** to the database.
 - Actions and Related Records:** Update any record and perform actions, like send an email. This more flexible flow runs **after the record is saved** to the database.
- Is this flow making an external callout or connecting to an external system?
An asynchronous path is required for flows that involve external systems.
Add Asynchronous Path

7. Under record trigger flow click on "+" icon and select action

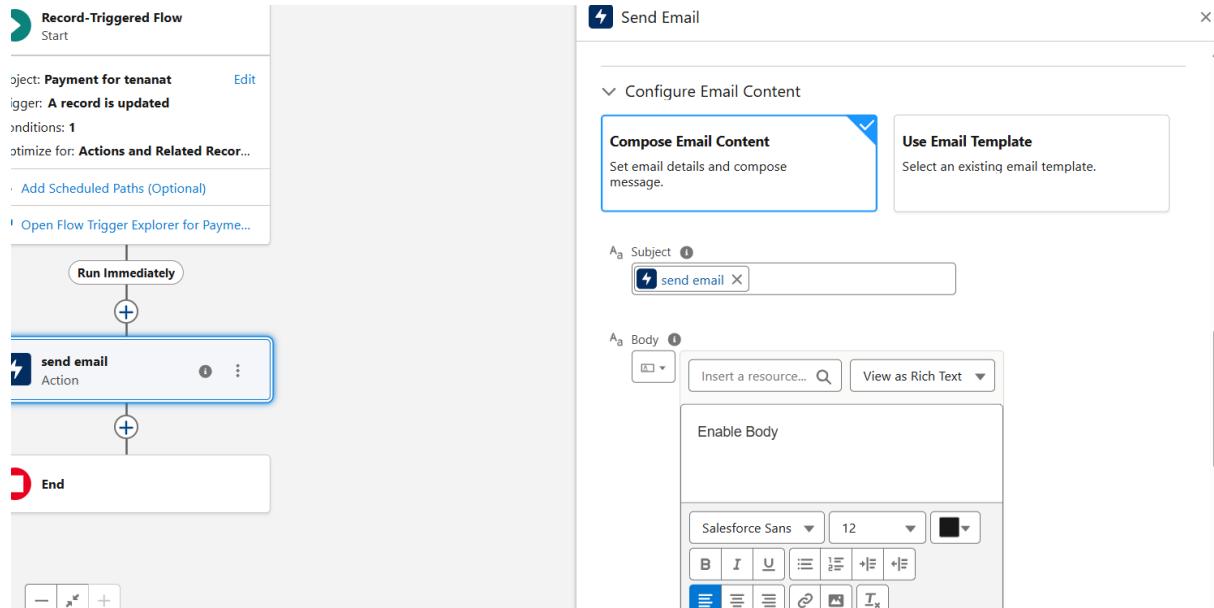


In action search for send email then click on send email (check below image)



8. Label: send email

API Name: send email



9. Label: send email

10. API Name: send email

11. Enable Body

12. Click on new resource

Under resource type select "Text Template"

API Name: emailbody

Under body: (paste the below text)

Dear (!\$Record.Tenantr.Name). We hope this email finds you well. We are writing to inform you that we have successfully received your monthly payment. Thank you for your prompt

and diligent payment.

Edit Text Template

* API Name i

Description

* Body i

View as Rich Text

🔍

Dear {!\$Record.Name},

We hope this email finds you well. We are writing to inform you that we have successfully received your monthly payment. Thank you for your prompt and diligent payment.

Salesforce Sans
12

B
I
U

14. Click Done.

15. Enable recipient Address List Paste this?\${Record.Tenant_r.Email_c})

16. Click Done

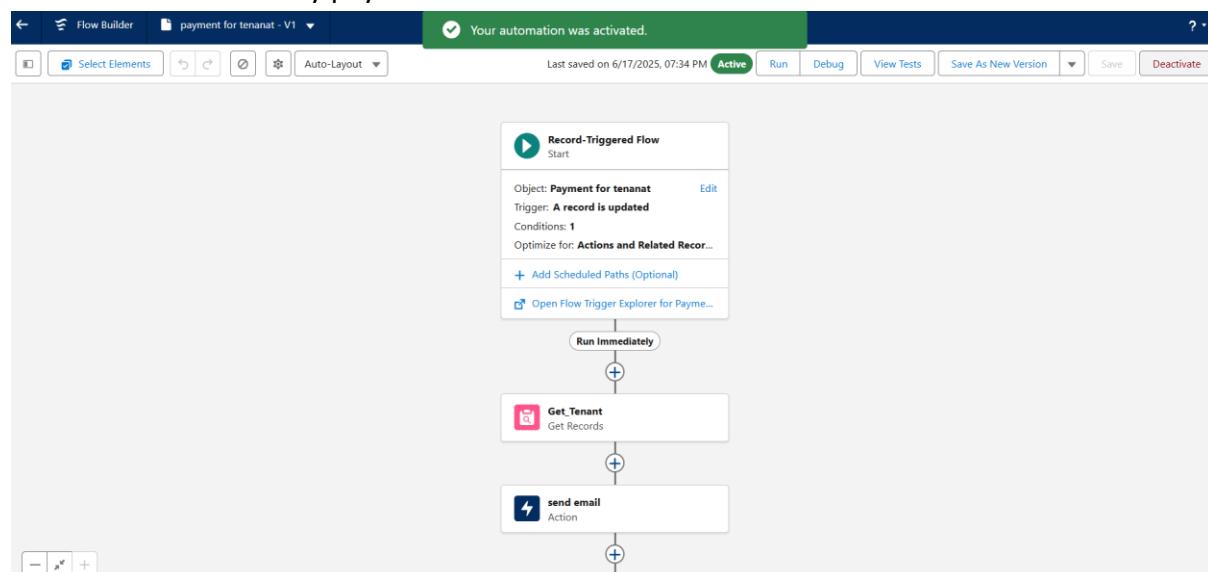
17. Enable subject

Paste this >> Confirmation of Successful Monthly Payment

18. Click on save

Flow label: monthly payment

Flow API Name monthly payment and Click on activate



The screenshot shows the Salesforce Setup Flows page. The flow is named "monthly payment". Key details include:

- Flow API Name: payment_for_tenantat
- Type: Autolaunched Flow
- URL: /flow/payment_for_tenantat
- Active Version: 1
- Trigger: Record—Run After Save
- Modified By: SRAVYA.GOKADA, 6/17/2025, 7:04 AM
- Created By: SRAVYA.GOKADA, 6/17/2025, 4:46 AM

The "Flow Versions" section shows one version (Version 1) built with Flow Builder, activated, and running in Default Mode.

The screenshot shows the monthly payment flow record detail page. Key details include:

- Type: Record—Run After Save
- Associated Record: (None)
- Progress Status: Activated
- Last Modified Date: 6/17/2025, 7:08 AM
- Flow Owner: SRAVYA.GOKADA

The "Details" tab is selected, showing the following information:

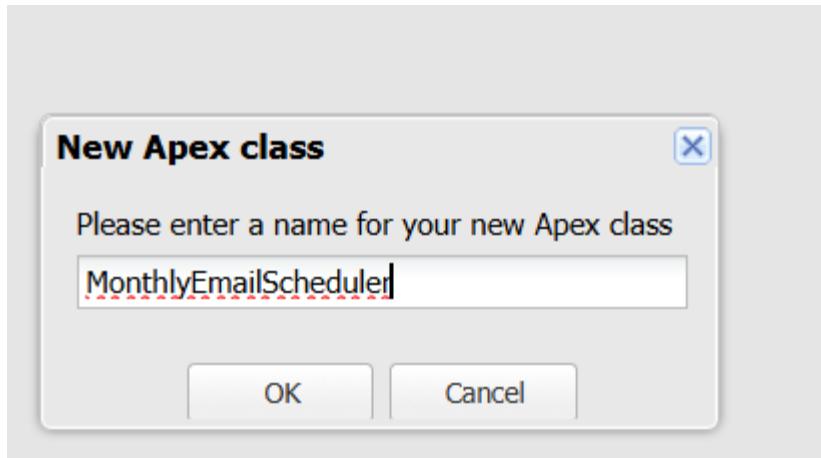
Field	Value
Flow Label	monthly payment
Description	Record-Triggered After Save Flow
Associated Record	(None)
Created By	SRAVYA.GOKADA, 6/17/2025, 7:08 AM
Last Modified	SRAVYA.GOKADA, 6/17/2025, 7:08 AM
Category	(None)
API Name	monthly_payment
Flow Type	Segment
Created Date	6/17/2025, 7:08 AM
Last Modified Date	6/17/2025, 7:08 AM
Subcategory	(None)

Buttons at the top right: Open Flow and Open Latest Version.

Schedule class:

Create An Apex Class

1. To create a new Apex Class follow the below steps: Click on the file >> New >> Apex Class.
2. Enter class name as MonthlyEmailScheduler.



Apex logic:

```
global class MonthlyEmailScheduler implements Schedulable {
    global void execute(SchedulableContext sc) {
        Integer currentDay=Date.today().day();
        if (currentDay==1) {
            send Monthly Emailist[];
        }
    }
    public static void send Monthly Emails() {
        List Tenant c> tenants = [SELECT id, Email_c FROM Tenant_cl: for (Tenant_c tenant: tenants) {
            String recipient Email = 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 payment ensures the smooth functioning of our
            rental arrangement and helps maintain a positive living environment for all
            String email Subject = "Reminder: Monthly Rent Payment Due": Messaging
            SingleEmailMessage email = new
```

```
Messaging.SingleEmailMessage message = new Messaging.SingleEmailMessage();
message.setToAddresses(new String[]{recipientEmail});
message.setSubject(emailSubject);
message.setPlainTextBody(emailContent);
Messaging.sendEmail(message);
```

Save the code.

```
File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < ▾ >
MonthlyEmailScheduler.apxc
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 ▾ Go To
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
```

The screenshot shows the Salesforce IDE interface with the code editor open. The file is named `MonthlyEmailScheduler.apxc`. The code implements a scheduled apex job to send an email monthly. It creates a `Messaging.SingleEmailMessage` object, sets the recipient, subject, and body, and then sends it using the `Messaging.sendEmail` method.

```
27     Messaging.SingleEmailMessage email = new Messaging.SingleEmailMessage();
28
29     email.setToAddresses(new String[]{recipientEmail});
30
31     email.setSubject(emailSubject);
32
33     email.setPlainTextBody(emailContent);
34
35     Messaging.sendEmail(new Messaging.SingleEmailMessage[]{email});
36
37 }
38
39 }
40
41 }
42
43
44 }
```

The IDE also displays tabs for Logs, Tests, Checkpoints, Query Editor, View State, Progress, and Problems. The Problems tab is selected, showing no errors or warnings.

This screenshot is similar to the first one, but a context menu is open over the `Save` option in the `File` menu. The menu also includes options like Open, Open Resource, Open Lightning Resources, Save All, Delete, Close, and Close All. The `Save` option is highlighted.

The code in the editor remains the same as in the first screenshot.

https://orgfarm-71e75fd7db-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSPage#

Schedule Apex Class

1. Enter Apex class in quick find box
2. Select schedule Apex

The screenshot shows the Salesforce Setup Apex Classes page. In the search bar at the top, 'apex class' is typed. Below the search bar, there's a message: 'Didn't find what you're looking for? Try using Global Search.' On the left sidebar, 'Apex Classes' is selected under 'Custom Code'. The main content area displays a table of Apex classes. One row is highlighted in green with a checkmark icon, indicating it is currently used. The table includes columns for Action, Name, Namespace Prefix, API Version, Status, Size Without Comments, Last Modified By, and Has Trace Flags. The 'Has Trace Flags' column contains checkboxes, all of which are unchecked for the listed classes.

Action	Name	Namespace Prefix	API Version	Status	Size Without Comments	Last Modified By	Has Trace Flags
Edit Del Security	MonthlyEmailScheduler		64.0	Active	1,128	SRAVYA.GOKADA, 6/17/2025, 7:16 AM	<input type="checkbox"/>
Edit Del Security	test		64.0	Active	22	SRAVYA.GOKADA, 6/17/2025, 3:12 AM	<input type="checkbox"/>
Edit Del Security	testHandler		64.0	Active	584	SRAVYA.GOKADA, 6/17/2025, 4:38 AM	<input type="checkbox"/>

3. Enter job Name: Monthly EmailScheduler
4. Apex class: Monthly Email Scheduler
- 5. Frequency: Monthly==>select on day 1

The screenshot shows the Schedule Apex page for the 'MonthlyEmailScheduler' job. The 'Job Name' field contains 'MonthlyEmailScheduler' and the 'Apex Class' field also contains 'MonthlyEmailScheduler'. The 'Schedule Using' section has 'Schedule Builder' selected. Under 'Schedule Apex Execution', the 'Frequency' is set to 'Monthly' (selected radio button). The 'On day 1 of every month' option is selected, with 'Sunday' also available as an alternative. The 'Start' date is set to '4/12/2023' and the 'End' date is set to '4/01/2024'. The 'Preferred Start Time' is set to '9:00 AM'. A note at the bottom states: 'Exact start time will depend on job queue activity.'

6. Start date:
- 7 End date
8. Preferred start time

- Testing the approval process

Enter any comment and click on submit

- Click on the notification

You will find notification like this and you will get an email check

Screenshot of a web browser showing a Salesforce Lease Management record for a tenant named "sravya". The record includes details like Label and Format (sravya), Email (sravya12@gmail.com), Phone (963258741), and Status (Leaving). The "Details" tab is selected. On the right, a sidebar shows a list of notifications for "SRAVYA GOKADA" regarding tenant approval requests.

Notifications

- SRAVYA GOKADA is requesting approval for tenant
Label and Format: sravya • Email: sravya12@gmail.com
in 6 minutes •
- Approval request for the tenant is approved
sravya
a day ago •
- Approval request for the tenant is rejected
sravya
a day ago •
- Approval request for the tenant is approved
sravya
Jun 25, 2025, 8:18 PM •
- Approval request for the tenant is approved
sravya
Jun 25, 2025, 8:14 PM •

Screenshot of a web browser showing a Process Instance Step named "Tenant Approval" in an "Approved" state. The step details show the submitter as "SRAVYA GOKADA", date submitted as "Jun 27, 2025", actual approver as "SRAVYA GOKADA", and assigned to "SRAVYA GOKADA". The "Approver Comments" section shows a comment from "SRAVYA GOKADA" with the word "approve" and the timestamp "Jun 27, 2025, 1:40:01 AM".

A screenshot of a Gmail inbox. The left sidebar shows 'Compose' and 'Inbox' (139). The main area displays an email from 'SRAVYA GOKADA' with the subject 'Your Leave Request Has Been Approved'. The message body reads: 'I hope this message finds you well. I am writing to inform you that I have received your email confirming the approval of my leave request. I would like to express my gratitude for considering and approving my time off.' Below the message are 'Reply' and 'Forward' buttons.

Note : Similarly do for reject also you will get mail and notification

A screenshot of a Gmail inbox. The left sidebar shows 'Compose' and 'Inbox' (140). The main area displays an email from 'SRAVYA GOKADA' with the subject 'Leave rejected'. The message body reads: 'I hope this email finds you well. Your contract has not ended. So we can't approve your leave. your leave has rejected'. Below the message are 'Reply' and 'Forward' buttons.

A screenshot of a cloud-based approval interface. The top navigation bar includes 'Home', 'sravya Approval', 'Recently Viewed', 'sravya Tenant', 'sravya Approval', 'Notifications', and 'Mark all as read'. The main content area shows a 'Process instance Step Tenant Approval' step with status 'Rejected'. It lists 'Submitter: SRAVYA GOKADA', 'Date Submitted: Jun 20, 2025', 'Actual Approver: SRAVYA GOKADA', and 'Assigned To: SRAVYA GOKADA'. On the right, a 'Notifications' sidebar shows five notifications: 'Approval request for the tenant is rejected' by 'sravya' (a few seconds ago), 'Approval request for the tenant is rejected' by 'sravya' (2 minutes ago), 'Approval request for the tenant is rejected' by 'sravya' (8 minutes ago), 'Approval request for the tenant is rejected' by 'sravya' (13 minutes ago), and 'Approval request for the tenant is rejected' by 'sravya' (6 hours ago).

CONCLUSION:

The Lease Management project in Salesforce is a comprehensive solution that streamlines lease-related processes, providing a centralized platform for managing lease agreements, rent payments, and lease terms. By leveraging Salesforce's capabilities, the project offers numerous benefits, including:

- Improved efficiency and productivity
- Enhanced visibility and reporting
- Better compliance and risk management
- Scalability and flexibility

While there are potential challenges and disadvantages, careful planning, user training, and ongoing support can mitigate these issues. Overall, the Lease Management project in Salesforce has the potential to transform lease management processes, enabling organizations to optimize their lease portfolios and improve business outcomes.

Key Takeaways:

- Lease Management in Salesforce offers a robust solution for managing lease agreements and related processes.
- The project requires careful planning, implementation, and ongoing support to ensure success.
- By leveraging Salesforce's capabilities, organizations can improve efficiency, visibility, and compliance in lease management.

Future Directions:

- Continuously monitor and evaluate the system's performance to identify areas for improvement.
- Explore opportunities to integrate the Lease Management system with other Salesforce applications and external systems.

- Stay up-to-date with changing regulations and industry best practices to ensure the system remains compliant and effective.