

LEASE MANAGEMENT PROJECT

STEP BY STEP PROCESS

Using Salesforce Platform
By R.Subhasri and the team

**THE LEASE MANAGEMENT PROJECT UNDER NAAN MUDHALVAN
AIMS TO DEVELOP A SALESFORCE-BASED APPLICATION TO
STREAMLINE LEASE MANAGEMENT PROCESSES**

PROJECT OVERVIEW:-

The project focuses on creating an efficient lease management system to track leases, coordinate renewals, manage tenant relationships, and generate insightful reports on occupancy, lease expirations, and rental income.

OBJECTIVES:-

- **Enhance Lease Tracking:** Streamline lease management processes to reduce errors and increase productivity.
- **Improve Tenant Relationships:** Foster better relationships with tenants through effective communication and management.
- **Generate Insightful Reports:** Provide reports on occupancy, lease expirations, and rental income to inform business decisions.
- **Increase Efficiency:** Automate lease management tasks to save time and resources.

KEY FEATURES:-

- Lease tracking and renewal management
- Tenant relationship management
- Occupancy and lease expiration reporting
- Rental income tracking and analysis

This project aligns with the Naan Mudhalvan initiative's goal of equipping youth with advanced IT skills and problem-solving abilities in emerging technologies. By developing a lease management system, participants can gain hands-on experience in software development and project management.

STEP 1: SALESFORCE SETUP

- Create a Salesforce Developer Organization
- Enable the necessary permissions
- Set up profiles and users for the project

The image shows a screenshot of a web form titled "Sign up for your Salesforce Developer Edition". The title is in bold blue text at the top left. Below it is a subtitle: "A full-featured copy of the Platform, for free". A descriptive text block says: "Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial." The form contains five input fields: "First Name*" with placeholder "Your first name", "Last Name*" with placeholder "Your last name", "Email*" with placeholder "Your email address", "Role*" with placeholder "Your job role" (accompanied by a dropdown arrow icon), and "Company*" with placeholder "Company Name".

Sign up for your Salesforce Developer Edition

A full-featured copy of the Platform, for free

Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.

First Name*
Your first name

Last Name*
Your last name

Email*
Your email address

Role*
Your job role

Company*
Company Name

STEP 2: CREATE CUSTOM OBJECTS

- **Lease Object:** Stores lease agreements.
- **Tenant Object:** Contains tenant details.
- **Property Object:** Houses property information.

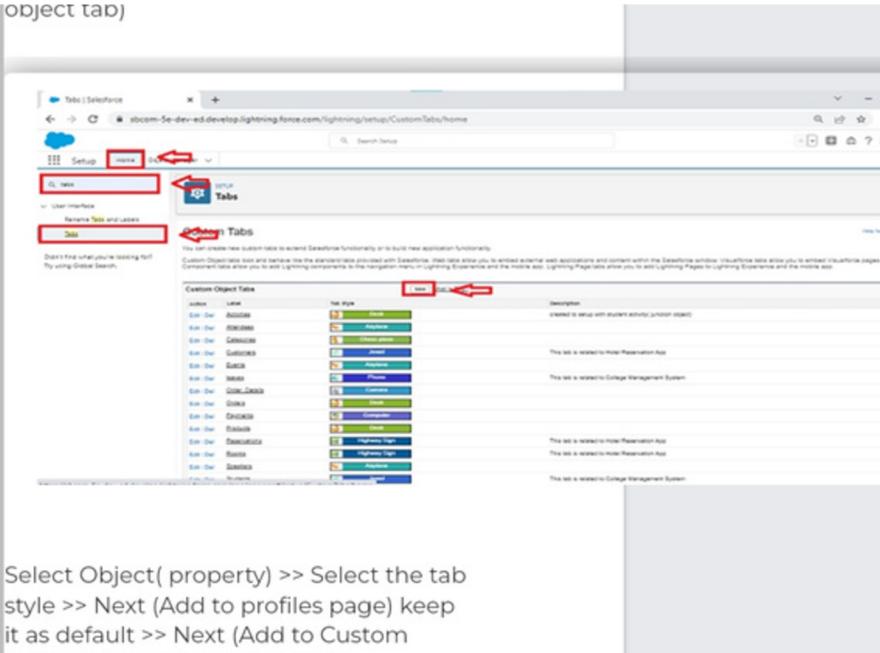


Create Property Object:

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>> property
 2. Plural label name>> property
 3. Enter Record Name Label and Format
 - Record Name >>property Name
 - Data Type >> Text
2. Click on Allow reports and Track Field History,Allow Activities
3. Allow search >> Save.

STEP 3: CREATE TABS

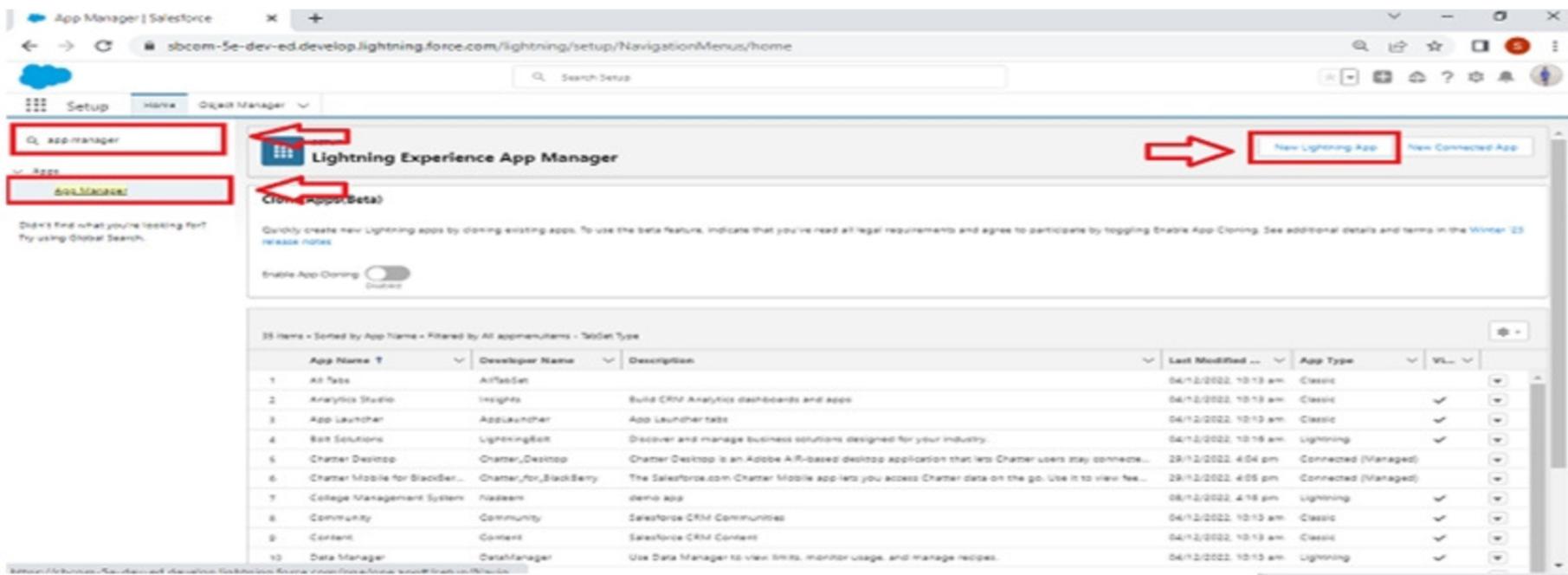


The screenshot shows the Salesforce Setup interface with the 'Custom Tabs' page open. A red box highlights the 'New' button in the top right corner of the list area. Another red box highlights the 'Name' field where 'Lease' has been typed. To the left, a sidebar lists various setup categories like 'Salesforce', 'Object', 'Tabs', etc., with 'Tabs' expanded to show sub-options: 'Creating A Custom Tab' (highlighted in orange), 'Creating Remaining Tabs', 'The Lightning App', 'Fields', 'Validation Rule', and 'Email Templates'.

Select Object(property) >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom)

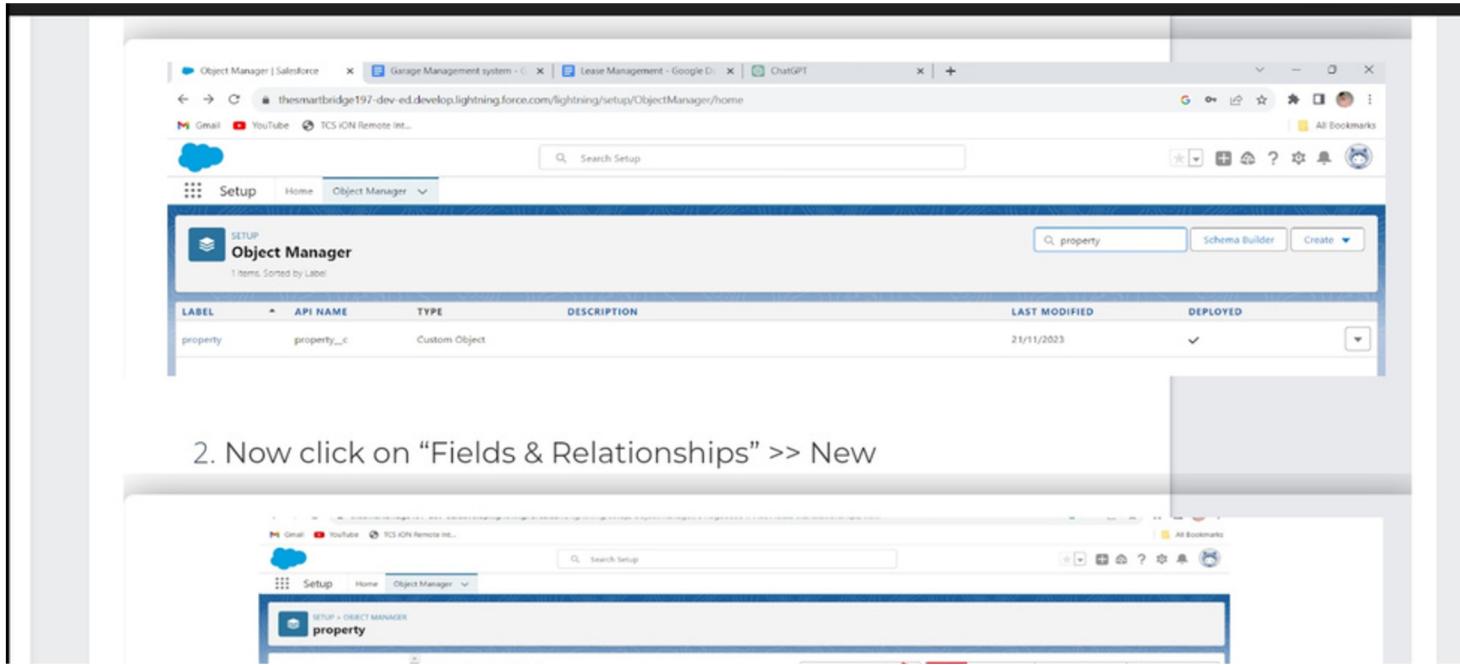
- **Implement tabs for Lease, Tenant, and Property objects.**
- **This will simplify navigation for users.**

STEP 4: BUILD THE LIGHTNING APP



- Create a new Lightning application.
- Incorporate tabs for Lease, Tenant, and Property.
- Assign access to the necessary profiles.

STEP 5: CREATE FIELDS



The screenshot shows the Salesforce Object Manager interface. At the top, there are several tabs: Object Manager | Salesforce, Garage Management system - C, Lease Management - Google D, ChatGPT, and others like Gmail, YouTube, and TCS ION Remote Int. Below the tabs is a search bar labeled "Search Setup". The main area is titled "Object Manager" with a sub-header "SETUP". It displays a table with one item: "property". The table has columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The "property" row has values: property, property_c, Custom Object, (empty), 21/11/2023, and a checked checkbox under DEPLOYED.

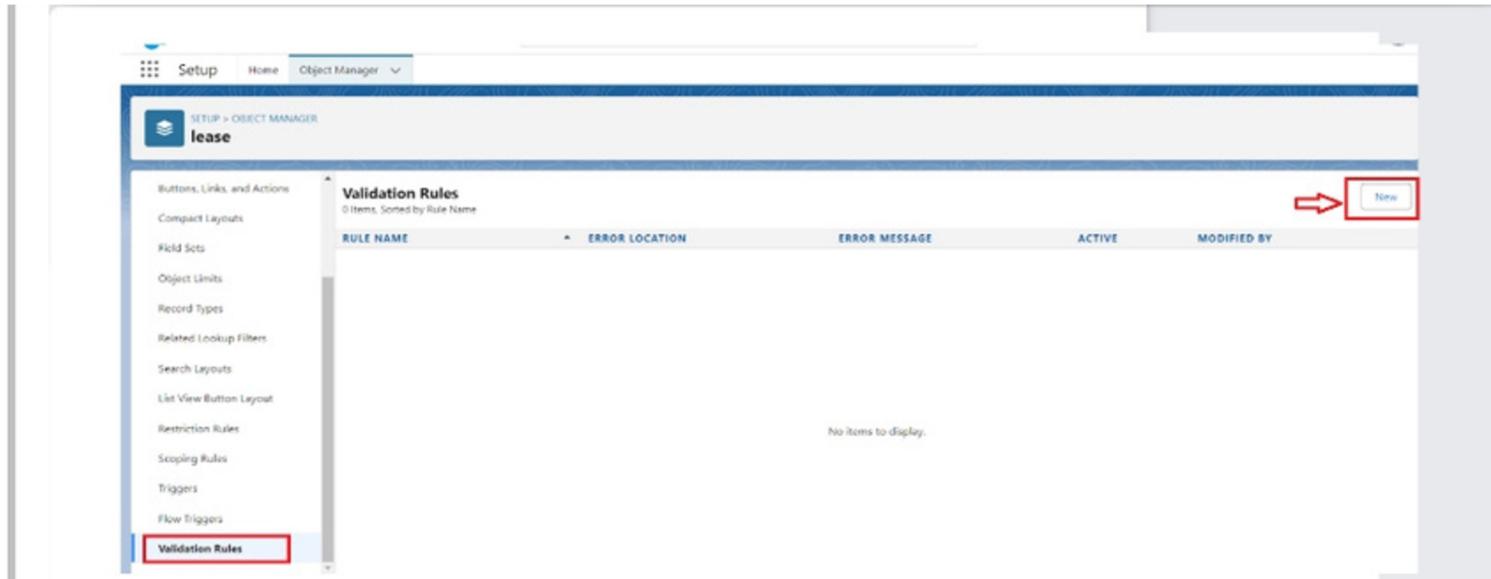
2. Now click on “Fields & Relationships” >> New



This screenshot shows the same Salesforce setup interface, but the "property" object is now selected, indicated by a blue border around its name in the list.

- **Custom fields to capture lease start date, end date, and rent amount.**
- **Fields designated for tenant details, as well as property size and location.**

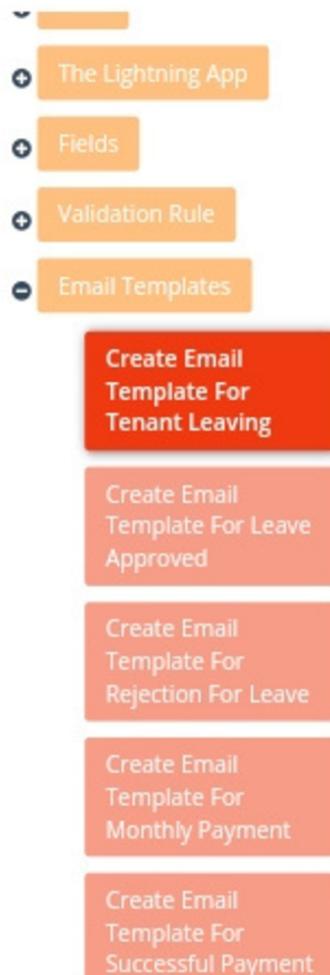
STEP 6: VALIDATION RULES



- Ensure that the lease end date is later than the start date.
- Validate the contact details of tenants.
- Prevent the submission of blank mandatory fields.

STEP 7: EMAIL TEMPLATES

- Develop email templates for the following purposes:
 - Lease approval
 - Lease rejection
 - Renewal reminders



Create Email Template For Tenant Leaving

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 leaving"

4. Template Unique Name : Auto populated

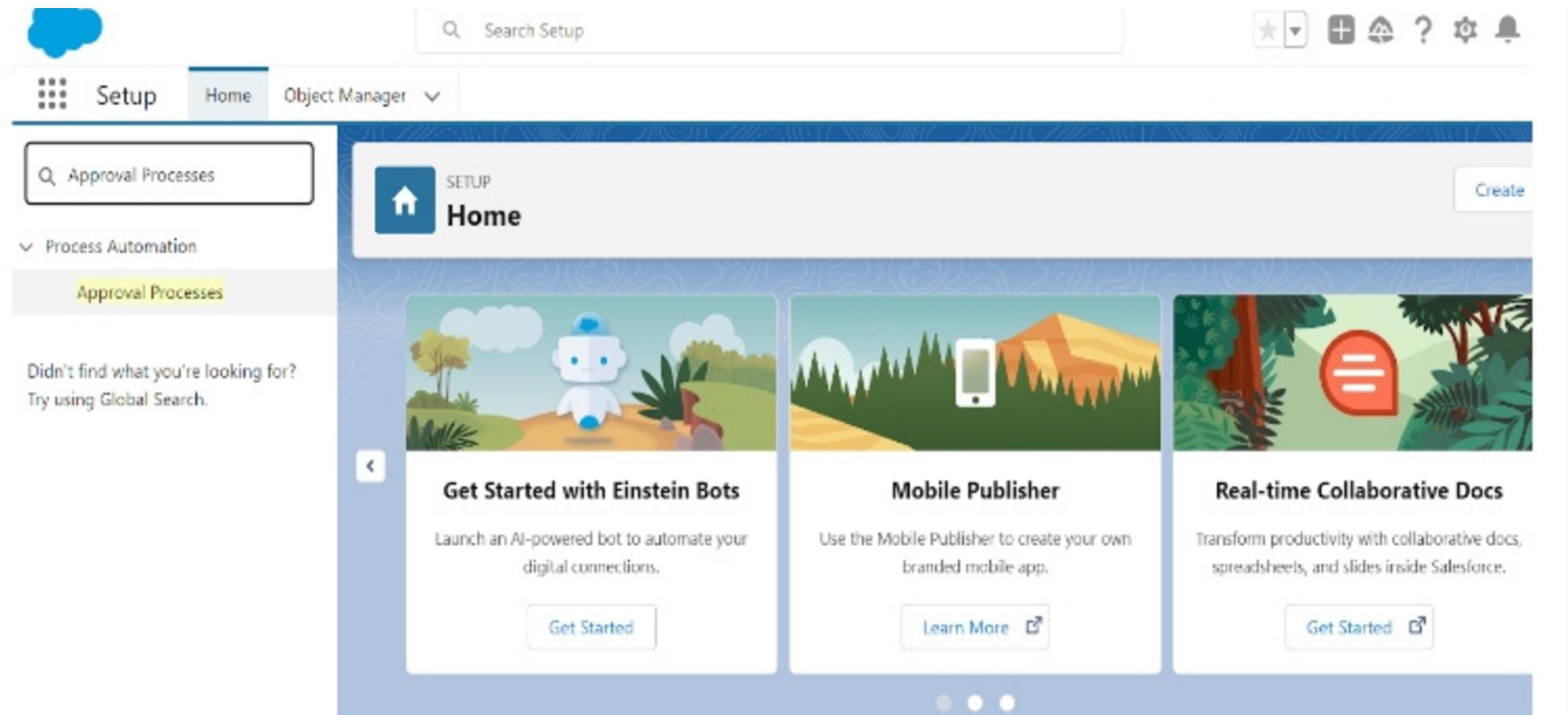
5. Subject :" request for approve the leave"

6. Email body:
Dear {!Tenant__c.CreatedBy},

Please approve my leave

7. Save

STEP 8: APPROVAL PROCESS



- Define the managerial approval process for lease agreements.
- Automate notifications for approval and rejection outcomes.

STEP 9: APEX TRIGGER

Guided Project Project Workspace

LEASE MANAGEMENT

- Salesforce
- Object
- Tabs
- The Lightning App
- Fields
- Validation Rule
- Email Templates
- Approval Process
- Apex Trigger

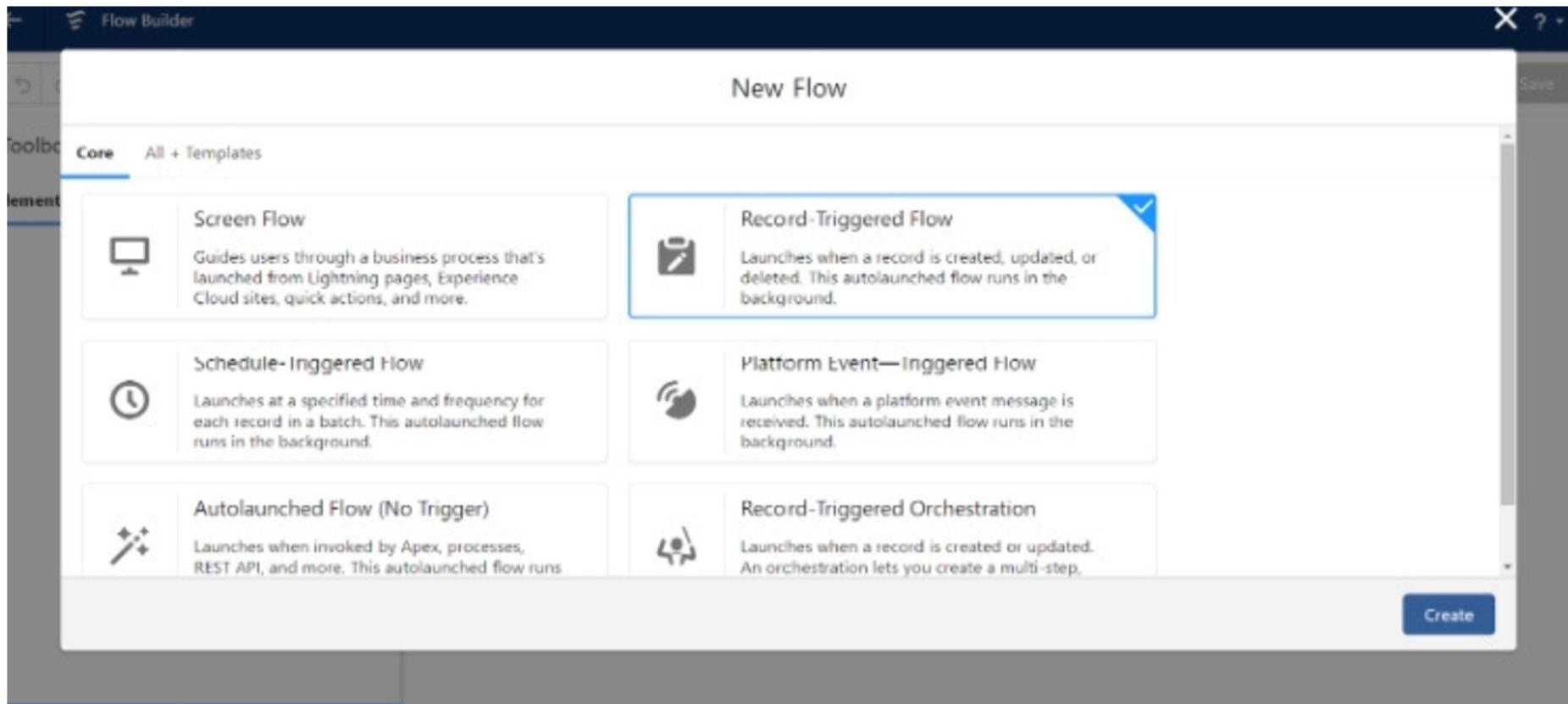
Create An Apex Trigger

1. To create a new Apex Class follow the below steps:
Click on the file >> New ? Apex Class.

The screenshot shows the Salesforce IDE interface. On the left, there's a sidebar with a 'LEASE MANAGEMENT' section containing various items like Salesforce, Object, Tabs, etc., and a 'Apex Trigger' item which is currently selected and highlighted in orange. Below this, there are three buttons: 'Create An Apex Trigger' (orange), 'Create An Apex Handler Class' (light orange), and 'Testing The Trigger' (light orange). The main area is titled 'Create An Apex Trigger'. It contains a step-by-step guide: '1. To create a new Apex Class follow the below steps: Click on the file >> New ? Apex Class.' Below the guide is a screenshot of the Salesforce IDE's 'File' menu. The 'New' option is highlighted with a red box. In the dropdown menu, 'Apex Class' is also highlighted with a red box. Other options in the dropdown include 'Open', 'Open Resource', 'Open Lightning Resources', 'Open Log', 'Open Raw Log', 'Download Log', 'Save', 'Save All', 'Delete', 'Close', and 'Close All'. Each option has a corresponding keyboard shortcut listed next to it.

- Automatically update property availability.
- Trigger actions on lease creation or update.

STEP 10: FLOWS



- Automate multi-step processes.
- Example: Send email + update record + notify manager.

STEP 11: SCHEDULE CLASS

- Create a scheduled class for:
 - °Lease renewal reminders
 - °Monthly rent due alerts

The screenshot shows the 'Apex Classes' page in the Salesforce developer console. On the left, there's a sidebar with a red box around the 'Schedule Class' button. The main area has a yellow banner at the top with the text: 'Apex Class is a custom utility program running up to once a day in terms of lease renewals or in Spring Update. To run this class a user needs to be in the System Administrator or the System Peon roles. Apex Classes runs automatically when you log in.' Below the banner, there's a section titled 'Run Apex Class' with a red arrow pointing to the 'Schedule Class' button. A table below lists four scheduled classes:

Name	Name F.	Recurrence	Applies	Run	Schedule Details	Action	Next Run
LeaseRenewal	LeaseRenewal	0.1	None	01		Schedule	2018-12-01 00:00:00
LeaseRenewal	LeaseRenewal	0.1	None	01		Schedule	2018-12-01 00:00:00
RentDueAlert	RentDueAlert	0.1	None	10		Schedule	2018-12-01 00:00:00
RentDueAlert	RentDueAlert	0.1	None	01		Schedule	2018-12-01 00:00:00

CONCLUSION

- This step-by-step Lease Management System ensures smooth handling of leases, tenants, and properties.
- Salesforce automation improves efficiency and reduces manual work.
- Future Enhancements: AI for rent prediction, Mobile App integration.