

LEASE MANAGEMENT

Project by :

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Introduction:

A lease management project involves creating a system or application to efficiently handle the processes related to leasing real estate properties, equipment, or other assets. The goal is to streamline and automate various tasks associated with lease agreements, ensuring accurate record-keeping, compliance with regulations, and effective communication between parties involved.

Property :

The **Property** in a lease management system refers to the unique name or label assigned to a property to distinguish it from others. It plays a vital role in ensuring clear identification and efficient record-keeping. The title is accompanied by essential details such as the property's address, type, and ownership information. This allows for organized management of properties, facilitating smooth

operations like lease agreements and tenant management.

SETUP > OBJECT MANAGER

Property

Details	Fields & Relationships 8 Items, Sorted by Field Label					<input type="text" value="Quick Find"/>	New	Deleted Fields	Field Dependencies	Set History Tracking
Fields & Relationships	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED					
Page Layouts	Address	Address__c	Long Text Area(32768)							
Lightning Record Pages	Created By	CreatedById	Lookup(User)							
Buttons, Links, and Actions	Last Modified By	LastModifiedById	Lookup(User)							
Compact Layouts	Name	Name__c	Text(25)							
Field Sets	Owner	OwnerId	Lookup(User,Group)		✓					
Object Limits	Property Name	Name	Text(80)		✓					
Record Types	sqft	sqft__c	Text(18)							
Related Lookup Filters	Type	Type__c	Picklist							
Search Layouts										
List View Button Layout										
Restriction Rules										
Scoping Rules										

Lease :

The **Lease** in a lease management system represents the formal agreement between a property owner and a tenant. It outlines the terms and conditions under which the property is rented, including the duration, rental amount, payment schedule, and any specific obligations or restrictions for both parties. The lease ensures clarity and legal compliance, serving as a reference for resolving disputes and managing the relationship between the owner and tenant. It is a crucial component for maintaining transparency and accountability in property rentals.

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lease

Details	Fields & Relationships 7 Items, Sorted by Field Label					<input type="text" value="Quick Find"/>	New	Deleted Fields	Field Dependencies	Set History Tracking
Fields & Relationships	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED					
Page Layouts	Created By	CreatedById	Lookup(User)							
Lightning Record Pages	End date	End_date__c	Date							
Buttons, Links, and Actions	Last Modified By	LastModifiedById	Lookup(User)							
Compact Layouts	lease Name	Name	Text(80)		✓					
Field Sets	Owner	OwnerId	Lookup(User,Group)		✓					
Object Limits	Property	Property__c	Lookup(Property)		✓					
Record Types	start date	start_date__c	Date							
Related Lookup Filters										
Search Layouts										
List View Button Layout										
Restriction Rules										
Scoping Rules										

Payment:

The **Payment** in a lease management system refers to the financial transaction made by the tenant to fulfill their rental obligations as outlined in the lease agreement. It includes details such as the payment amount, due date, payment method, and transaction status. Efficient tracking of payments helps ensure timely collection, minimizes disputes, and provides a clear record of the tenant’s financial compliance.

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Payment for 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

Fields & Relationships

8 Items, Sorted by Field Label

Q, Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Number(18, 0)		
check for payment	check_for_payment__c	Picklist		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Payment date	Payment_date__c	Date		
Payment Name	Name	Text(80)		
Property	Property__c	Master-Detail(Property)		
Tenant	Tenant__c	Lookup(Tenant)		

Tenant:

The **Tenant** in a lease management system refers to the individual or entity renting a property under a lease agreement. The system maintains detailed records of the tenant, including their personal information, contact details, and the property they are leasing. This ensures clear communication and effective management of tenant-related activities, such as lease agreements, payment tracking, and service requests. The tenant is a key stakeholder, and their satisfaction is vital for maintaining a positive and professional

rental relationship.

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

Fields & Relationships

7 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Phone	Phone__c	Phone		
Property	Property__c	Master-Detail(Property)		✓
status	status__c	Picklist		
Tenant Name	Name	Text(80)		✓

Email Templates :

The email templates in the lease management system streamline communication by addressing key aspects like property updates, lease agreements, payment notifications, and tenant interactions. They ensure consistency and professionalism in messages, whether notifying tenants about upcoming payments, sharing lease details, or providing updates on property availability or maintenance. These templates help maintain clear, efficient, and transparent communication between all stakeholders.

Text Email Template

Tenant Email

Help for this Page

Preview your email template below.

Email Template Detail

EditDeleteClone

Email Templates from Salesforce	Unfiled Public Classic Email Templates		
Email Template Name	Tenant Email	Available For Use	✓
Template Unique Name	Tenant_Email	Last Used Date	
Encoding	Unicode (UTF-8)	Times Used	
Author	Vengat Sanjay (Change)		
Description			
Created By	Vengat Sanjay, 16/11/2024, 8:27 pm	Modified By	Vengat Sanjay, 16/11/2024, 8:28 pm

EditDeleteClone

Email Template

Send Test and Verify Merge Fields

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

Text Email Template

Leave approved

Help for this Page ?

Preview your email template below.

Email Template Detail

EditDeleteClone

Email Templates from Salesforce

Unfiled Public Classic Email Templates

Email Template Name	Leave approved	Available For Use	✓
Template Unique Name	Leave_approved	Last Used Date	
Encoding	Unicode (UTF-8)	Times Used	
Author	Vengat Sanjay (Change)		
Description			
Created By	Vengat Sanjay, 16/11/2024, 8:25 pm	Modified By	Vengat Sanjay, 16/11/2024, 8:28 pm

EditDeleteClone

Email Template

Send Test and Verify Merge Fields

Subject

Leave approved

Plain Text Preview

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

Text Email Template

tenant payment

Help for this Page ?

Preview your email template below.

Email Template Detail

EditDeleteClone

Email Templates from Salesforce

Unfiled Public Classic Email Templates

Email Template Name	tenant payment	Available For Use	✓
Template Unique Name	tenant_payment	Last Used Date	
Encoding	Unicode (UTF-8)	Times Used	
Author	Vengat Sanjay (Change)		
Description			
Created By	Vengat Sanjay, 16/11/2024, 8:29 pm	Modified By	Vengat Sanjay, 16/11/2024, 8:29 pm

EditDeleteClone

Email Template

Send Test and Verify Merge Fields

Subject

Confirmation of Successful Monthly Payment

Plain Text Preview

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.

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.

Custom Tabs

[Help for this Page](#)

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.

Custom Object Tabs New What Is This?			
Action	Label	Tab Style	Description
Edit Del	Leases	 Balls	
Edit Del	Payments for tenant	 Bell	
Edit Del	Property	 Bank	
Edit Del	Tenants	 Box	

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?	
--	--

Apex Trigger:

Code for test :

trigger test on Tenant__c (before insert)

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

Apex Class :

Code for tesHandler :

```
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)) {

            newTenant.addError('A tenant can have only one property');

        }

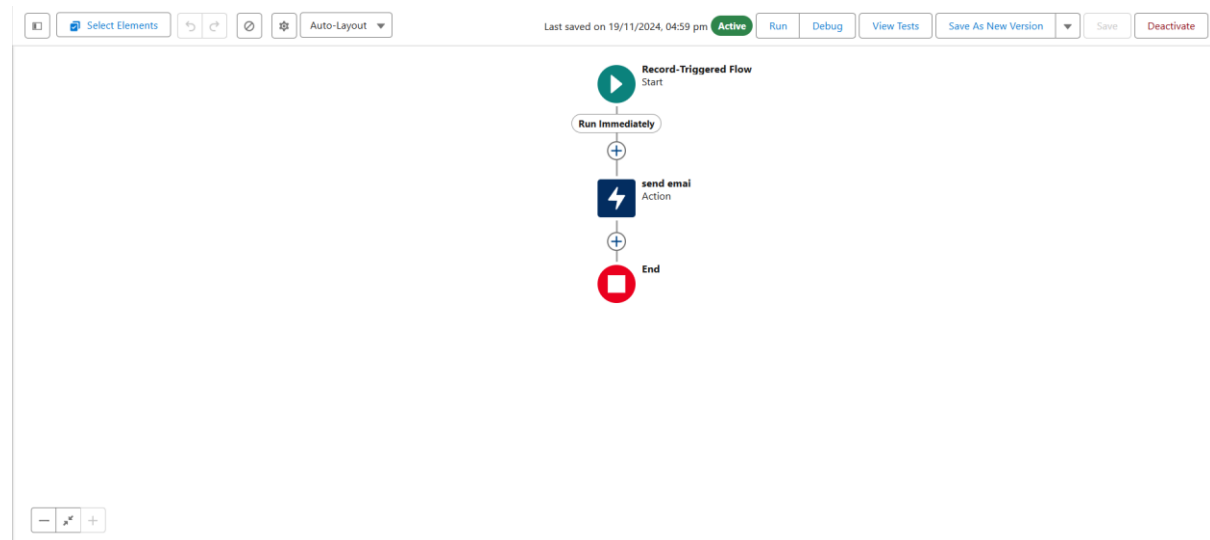
    }

}
}
}
}

```

Flows :

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.



Schedule Class :

Code for class of Monthly payment :

```

global class MonthlyEmailScheduler implements Schedulable {
    global void execute(SchedulableContext sc) {
        Integer currentDay = Date.today().day();
        if (currentDay == 1) {
            sendMonthlyEmails();
        }
    }

    public static void sendMonthlyEmails() {

        List<Tenant__c> tenants = [SELECT Id, Email__c FROM
Tenant__c];

        for (Tenant__c tenant : tenants) {
            String recipientEmail = tenant.Email__c;

            String emailContent = 'I trust this email finds you well. I am
writing to remind you that the monthly rent is due Your timely
payment ensures the smooth functioning of our rental arrangement
and helps maintain a positive living environment for all.';

            String emailSubject = 'Reminder: Monthly Rent Payment Due';

            Messaging.SingleEmailMessage email = new
Messaging.SingleEmailMessage();

            email.setToAddresses(new String[]{recipientEmail});

```



```
email.setSubject(emailSubject);  
email.setPlainTextBody(emailContent);
```

```
        Messaging.sendEmail(new  
Messaging.SingleEmailMessage[]{email});  
    }  
}  
}
```

Conclusion :

In conclusion, the lease management system serves as a comprehensive solution for streamlining property, tenant, lease, and payment management. By organizing essential information and automating key processes, it enhances efficiency, reduces errors, and fosters transparency between property owners and tenants. This system not only simplifies administrative tasks but also ensures timely communication and compliance with lease agreements, contributing to better property management and stronger tenant relationships.