

LEASE MANAGEMENT

College Name: Sri Ramakrishna College of Arts and Science For Women

College Code: bru28

TEAM ID: NM2025TMID24177

TEAM MEMBERS:

Team LeaderName: Vidarshana.M

Email: srcw2322k158@srcw.ac.in

Team member: Sowmiya.M

Email: srcw2322k152@srcw.ac.in

Team member: Sowmiya.S

Email: srcw2322k153@srcw.ac.in

Team Member: Swetha.S

Email: srcw2322k155@srcw.ac.in

1.INTRODUCTION

1.1 Project Overview

Lease Management System is designed to streamline and automate the end-to-end processes involved in managing real estate leases. Built to support property managers, leasing agents, finance teams, and compliance officers, the system consolidates tenant data, lease contracts, payment tracking, and communication into a centralized platform. It enables efficient management of tenant profiles, contract creation and renewals, rent schedules, and automated communications, significantly reducing manual work and improving accuracy. Leveraging Salesforce's automation capabilities—such as Flows for process automation, Approval Processes for contract and financial approvals, and Email Alerts for timely notifications—the system ensures that critical actions such as lease expirations, rent due dates, and document approvals are handled promptly and consistently. It also provides robust reporting and dashboard features for real-time visibility into key lease metrics, including occupancy rates, rent collection, and contract statuses. Documents and contracts are securely stored with version control and audit tracking, while role-based access ensures data privacy and compliance. The solution enhances operational efficiency, supports scalability across multiple properties and tenants, and improves tenant satisfaction through timely communication and transparent processes. Furthermore, the Lease Management System can integrate with external tools such as e-signature services (e.g., DocuSign), payment gateways, and scheduling systems, making it a flexible and future-ready platform for any organization involved in property leasing and management.




1.2 Purpose

The main objective of the project is to enable organizations to efficiently manage properties, tenants, and lease-related activities. It reduces manual intervention, improves accuracy, and ensures better compliance and communication.

DEVELOPMENT PHASE

Creating Developer Account:

By using this URL - <https://www.salesforce.com/form/developer-signup/?d=pb>



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

Sign up for your Developer Edition.

- ✓ 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

Sign up for your Developer Edition

A free Salesforce Platform environment with Agentforce and Data Cloud

First name

Vidmarshana ✓

Last name

M ✓

Job title

Student ✓

Work email

srcw2322k158@srcw. ✓

Company

Sri Ramakrishna College ✓

Country/Region

India ✓

Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud 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 limit use of those features and the org, and may terminate any org that has been inactive for 45 days.

- Created objects: Property, Tenant, Lease, Payment

SETUP > OBJECT MANAGER

Property

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

Details

Description

API Name

Property__c

Custom

✓

Singular Label

Property

Plural Label

property

Enable Reports

✓

Track Activities

✓

Track Field History

✓

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

Activate Windows

Go to Settings to activate Windows.

Edit

Delete

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

Details

Description

API Name

Tenant_c

Custom

✓

Singular Label

Tenant

Plural Label

Tenants

Enable Reports

✓

Track Activities

✓

Track Field History

✓

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

Activate Windows
Go to Settings to activate Windows.

Edit

Delete

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

Details

Description

API Name

Payment_for_tenant_c

Custom

✓

Singular Label

Payment for tenant

Plural Label

Payment

Enable Reports

✓

Track Activities

✓

Track Field History

✓

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

Activate Windows
Go to Settings to activate Windows.

Edit

Delete

● Creating a Custom Tab

Setup

Home

Object Manager

Search Setup

SETUP > OBJECT MANAGER

Lease

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Details

Description

API Name

Lease__c

Custom

✓

Singular Label

Lease

Plural Label

Lease

Enable Reports

✓

Track Activities

✓

Track Field History

✓

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

Edit

Delete

Activate Windows
Go to Settings to activate Windows.

Setup

Home

Object Manager

Search Setup

SETUP > OBJECT MANAGER

Lease

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Details

Description

API Name

Lease__c

Custom

✓

Singular Label

Lease

Plural Label

Lease

Enable Reports

✓

Track Activities

✓

Track Field History

✓

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

Edit

Delete

Activate Windows
Go to Settings to activate Windows.

- Developed Lightning App with relevant tabs

Lightning App Builder

App Settings

Pages

Lease Management

App Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

* App Name

Lease Management

* Developer Name

Lease_Management

Description

Enter a description...

App Branding

Image

Upload

Primary Color Hex Value

#0070D2

Org Theme Options

☐ Use the app's image and color instead of the org's custom theme

App Launcher Preview

LM

Lease Management

Activate Windows

Go to Settings to activate \

App Options

Navigation and Form Factor

* Navigation Style

- ☒ Standard navigation
- ☐ Console navigation

* Supported Form Factors

- ☒ Desktop and phone
- ☐ Desktop
- ☐ Phone

Setup and Personalization

Setup Experience

- ☒ Setup (full set of Setup options)
- ☐ Service Setup
- ☐ Data Cloud Setup

App Personalization Settings

- ☐ Disable end user personalization of nav items in this app
- ☐ Disable temporary tabs for items outside of this app
- ☐ Use Omni-Channel sidebar

App Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that item doesn't support.

Available Items

Create

Type to filter list...

Accounts
Activation Targets
Activations
All Sites
Alternative Payment Methods
Analytics
App Launcher
Appointment Categories

Selected Items

Tenants
property
Lease
Payment

Activate Windows
Go to Settings to activate Windows.

User Profiles

Choose the user profiles that can access this app.

Available Profiles

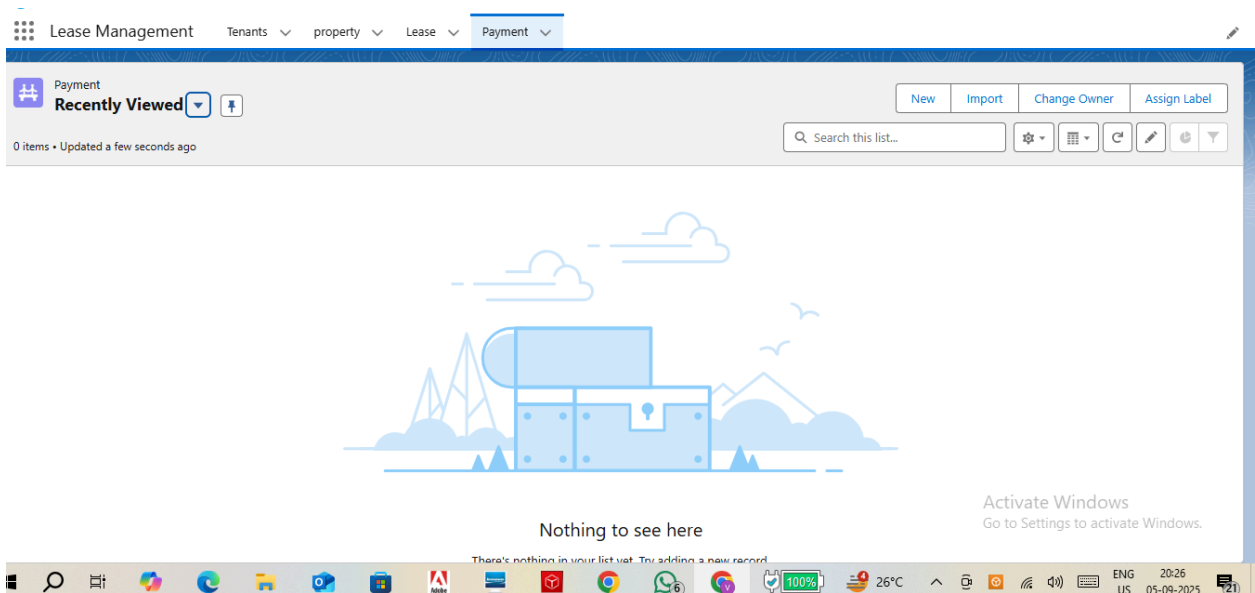
Type to filter list...

Analytics Cloud Integration User
Analytics Cloud Security User
Anypoint Integration
Authenticated Website
Authenticated Website
B2B Reordering Portal Buyer Profile
Contract Manager
Custom: Marketing Profile
Custom: Sales Profile

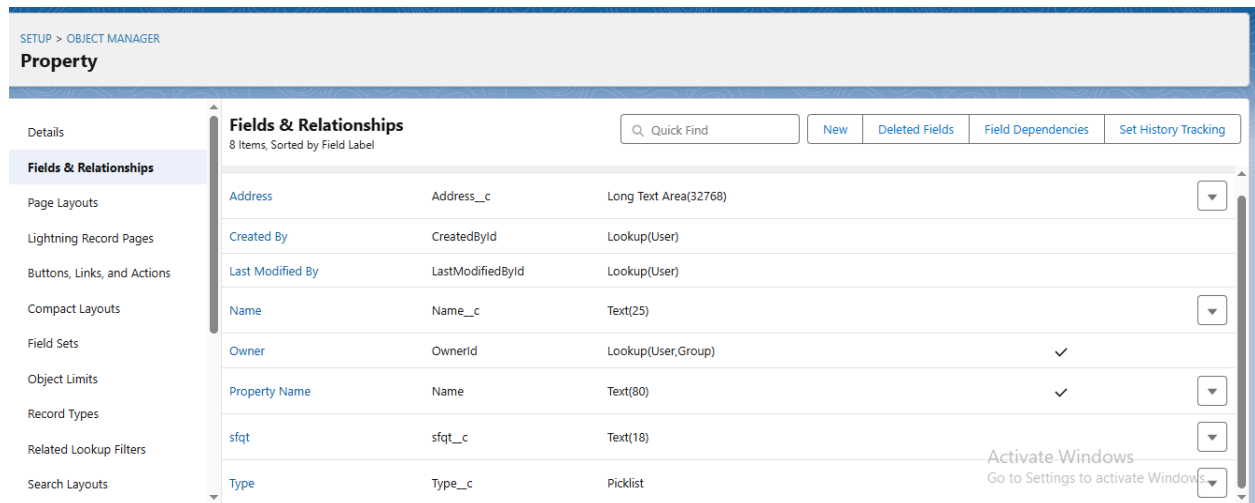
Selected Profiles

System Administrator

Activate Windows
Go to Settings to activate Windows.



- Fields and Relationships



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

Fields & Relationships

7 Items, Sorted by Field Label

Q Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone	Phone__c	Phone		
status	status__c	Picklist		
Tenant Name	Name	Text(80)		

Activate Windows
Go to Settings to activate Windows.

- Set Validation Rules

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Lease

Details

Fields & Relationships

Page Layouts

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Buttons, Links, and Actions

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Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Validation Rules

1 Items, Sorted by Rule Name

New

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
lease_end_date	start date	Your End date must be greater than start date	✓	Vidarshana M, 9/6/2025, 12:52 AM

- Email Templates

Setup

Home

Object Manager

classic email

Email

Classic Email Templates

Didn't find what you're looking for?

Try using Global Search.

SETUP

Classic Email Templates

Text Email Template

tenant leaving

Help for this Page

Preview your email template below.

Email Template Detail

Edit

Delete

Clone

Email Templates from Salesforce

Unified Public Classic Email Templates

Email Template Name

tenant_leaving

Available For Use

✓

Template Unique Name

tenant_leaving

Last Used Date

Encoding

Unicode (UTF-8)

Times Used

Author

Vidmarshana M (Change)

Description

Created By

Vidmarshana M

9/5/2025, 8:52 AM

Modified By

Vidmarshana M

9/5/2025, 8:52 AM

Edit

Delete

Clone

Email Template

Send Test and Verify Merge Fields

Subject

request for approve the leave

Plain Text Preview

Dear {Tenant__c.CreatedBy},

Please approve my leave

Setup

Home

Object Manager

classic

Email

Classic Email Templates

Classic Letterheads

Didn't find what you're looking for?

Try using Global Search.

SETUP

Classic Email Templates

Text Email Template

Leave approved

Help for this Page

Preview your email template below.

Email Template Detail

Edit

Delete

Clone

Email Templates from Salesforce

Unified 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

Vidmarshana M (Change)

Description

Created By

Vidmarshana M

9/5/2025, 8:54 AM

Modified By

Vidmarshana M

9/5/2025, 8:54 AM

Edit

Delete

Clone

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.

Setup

Home

Object Manager

Q classic

Email

Classic Email Templates

Classic Letterheads

Didn't find what you're looking for?

Try using Global Search.

SETUP

Classic Email Templates

Text Email Template

Leave rejected

Help for this Page

Preview your email template below.

Email Template Detail

Edit

Delete

Clone

Email Templates from Salesforce

Unified Public Classic Email Templates

Email Template Name

Leave rejected

Available For Use

✓

Template Unique Name

Leave_rejected

Last Used Date

Encoding

Unicode (UTF-8)

Times Used

Author

Vidarthana M (Change)

Description

Created By

Vidarthana M, 9/5/2025, 8:55 AM

Modified By

Vidarthana M, 9/5/2025, 8:55 AM

Edit

Delete

Clone

Email Template

Send Test and Verify Merge Fields

Subject

Leave rejected

Plain Text Preview

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

Setup

Home

Object Manager

classic

mail

Classic Email Templates

Classic Letterheads

n't find what you're looking for?

using Global Search.

SETUP

Classic Email Templates

Text Email Template

Tenant Email

Help for this Page

Preview your email template below.

Email Template Detail

Edit

Delete

Clone

Email Templates from Salesforce

Unified 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

Vidarthana M (Change)

Description

Created By

Vidarthana M, 9/5/2025, 8:56 AM

Modified By

Vidarthana M, 9/5/2025, 8:56 AM

Edit

Delete

Clone

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.

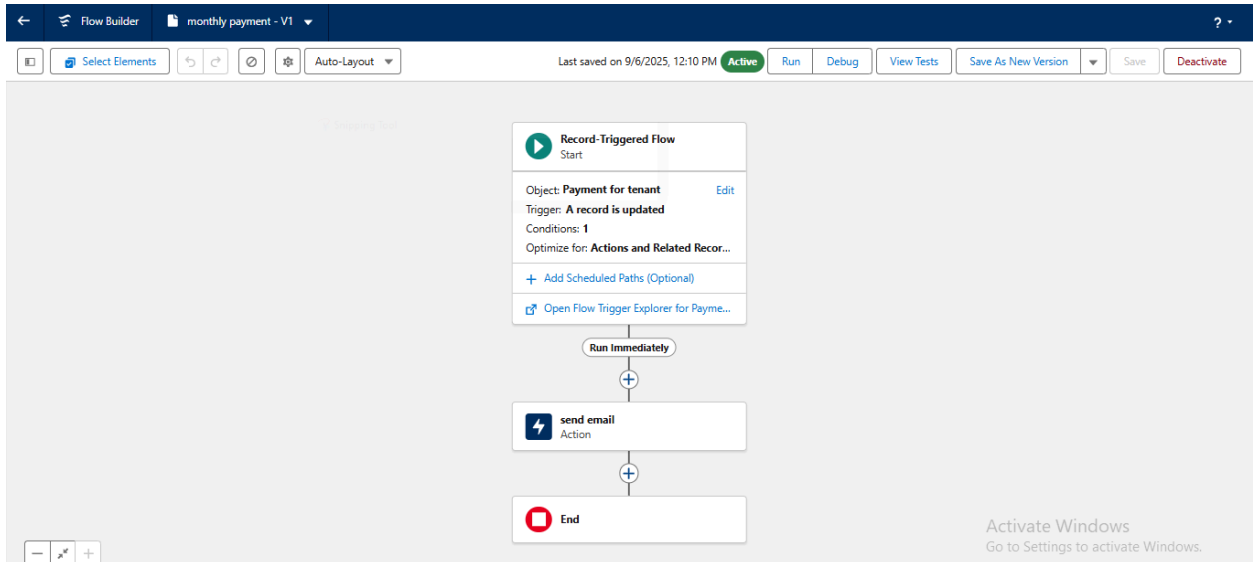


- Apex Trigger

```
1 trigger test on Tenant__c (before insert)
2 {
3     if(trigger.isInsert && trigger.isBefore){
4         testHandler.preventInsert(trigger.new);
5     }
6 }
```

```
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
19 }
```

- # Flows



- # Schedule class

The screenshot shows the Salesforce Developer Console with the 'MonthlyEmailScheduler' class open. The class implements the 'Schedulable' interface and contains the following code:

```
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
19 }
```

The console also shows the 'Problems' tab, which is currently empty. The status bar at the bottom indicates the code coverage is none and the API version is 64.

Browser tabs: (no subject), All | Tenants, Flows | Sales, Flows | Sales, Recently Viewed, Apex Classes, Student, Check Sales.

Address bar: orgfarm-da1653aa47-dev-ed.develop.lightning.force.com/lightning/setup/ApexClasses/page?address=%2F01pgK000005BxwL

Search Setup

Setup | Home | Object Manager

Search: apex

Left sidebar:

- Email
 - Apex Exception Email
- Custom Code
 - Apex Classes
 - Apex Settings
 - Apex Test Execution
 - Apex Test History
 - Apex Triggers
- Environments
 - Jobs
 - Apex Flex Queue
 - Apex Jobs

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

Apex Classes

Apex Class: MonthlyEmailScheduler

Buttons: Edit, Delete, Download, Security, Show Dependencies

Apex Class Detail

Name	MonthlyEmailScheduler	Status	Active
Namespace Prefix		Code Coverage	0% (0/15)
Created By	Vidarthana M., 9/5/2025, 11:44 PM	Last Modified By	Vidarthana M., 9/5/2025, 11:45 PM

Class Body | Class Summary | Version Settings | Trace Flags

```
1 global class MonthlyEmailScheduler implements Schedulable {
2
3     global void execute(SchedulableContext sc) {
4         Integer currentDay = Date.today().day();
5         if (currentDay == 1) {
6             sendMonthlyEmails();
7         }
8     }
9
10    }
11
12    }
13
14    }
15
16    public static void sendMonthlyEmails() {
17
18
19
20    }
21
22    }
23
24    }
25
26    }
27
28    }
29
30    }
31
32    }
33
34    }
35
36    }
37
38    }
39
40    }
41
42    }
43
44    }
45
46    }
47
48    }
49
50    }
51
52    }
53
54    }
55
56    }
57
58    }
59
60    }
61
62    }
63
64    }
65
66    }
67
68    }
69
70    }
71
72    }
73
74    }
75
76    }
77
78    }
79
80    }
81
82    }
83
84    }
85
86    }
87
88    }
89
90    }
91
92    }
93
94    }
95
96    }
97
98    }
99
100   }
```

Windows taskbar: 96% battery, 31°C, ENG US, 13:38, 06-09-2025

Search: Search...

Lease Management | Tenants | property | Lease | Payment

Tenant: Ajay

Buttons: New Contact, Edit, New Opportunity

Related | Details

Field	Value	Owner
Tenant Name	Ajay	Vidarthana M.
Email	srcw2322k158@srcw.ac.in	
Phone	(123) 456-7654	
Status	Stay	
Property	Hyd	
Created By	Vidarthana M., 9/7/2025, 1:10 AM	Last Modified By: Vidarthana M., 9/7/2025, 1:10 AM

Activity

Filters: All time • All act

Refresh

Upcoming & Overdue

No activities to show. Get started by sending an email, scheduling a meeting, or creating a task.

No past activity. Past meetings and tasks marked as completed.

Right sidebar menu:

- New Case
 - New Lead
 - Delete
 - Clone
 - Change Owner
 - Printable View
 - Sharing
 - Sharing Hierarchy
 - Submit for Approval
 - Edit Labels

Activate Windows. Go to Settings to activate Windows.

Lease Management

Tenants

property

Lease

Payment

Ajay Approval

Approval Request

Tenant Approval

Pending

Submitter

Vidarshana M

Date Submitted

Sep 7, 2025

Actual Approver

Vidarshana M

Assigned To

Vidarshana M

Details

Approval Details

Tenant Name

Ajay

Owner

Vidarshana M

Notifications

Mark all as read

Vidarshana M is requesting approval for tenant

Tenant Name: Ajay • Owner: Vidarshana M

a minute ago

Vidarshana M is requesting approval for tenant

Tenant Name: Vidarshana • Owner: Vidarshana M

an hour ago

Approval request for the tenant is approved

Ajay

4 hours ago

Approval request for the tenant is approved

5 hours ago

Approval request for the tenant is approved

17 hours ago

Approval request for the tenant is rejected

Activate Windows
Go to Settings to activate Windows.

Lease Management

tenants

property

Lease

Payment

Tenant

Ajay

Tenant was submitted for approval.

New Contact

Edit

New Opportunity

Related

Details

Tenant Name

Ajay

Email

srcw2322k158@srcw.ac.in

Phone

(123) 456-7654

status

Stay

Property

Hyd

Created By

Vidarshana M, 9/7/2025, 1:10 AM

Owner

Vidarshana M

Last Modified By

Vidarshana M, 9/7/2025, 1:10 AM

Activity

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No activities to show.

Get started by sending an email, scheduling a task, and more.

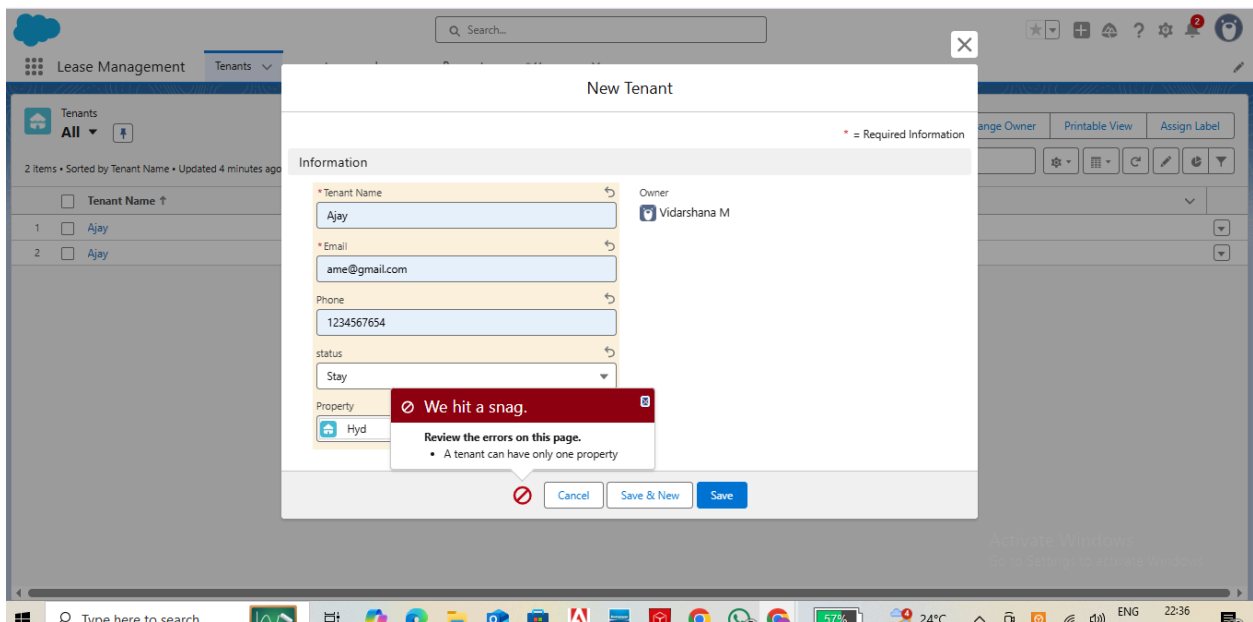
No past activity. Past meetings and tasks marked as done show up here.

Activate Windows
Go to Settings to activate Windows.

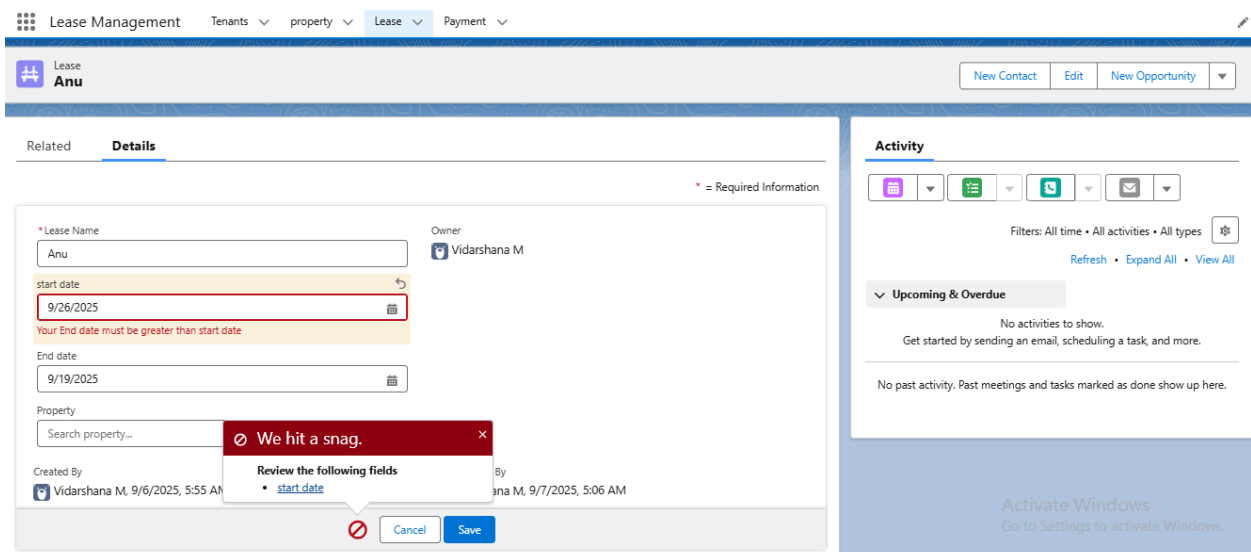
FUNCTIONAL AND PERFORMANCE TESTING

Performance Testing

- Trigger validation by entering duplicate tenant-property records



- Validation Rule Checking



- Approval process validated through email alerts and status updates

Lease Management

Tenants

property Lease Payment *Ajay Approval

Search...

Tenants

All

2 items • Sorted by Tenant Name • Updated a few seconds ago

Tenant Name
1 Ajay
2 Vidarshana

Notifications

Mark all as read

- Vidarshana M is requesting approval for tenant
Tenant Name: Ajay • Owner: Vidarshana M
23 minutes ago
- Vidarshana M is requesting approval for tenant
Tenant Name: Vidarshana • Owner: Vidarshana M
2 hours ago
- Approval request for the tenant is approved
Ajay
4 hours ago
- Approval request for the tenant is approved
5 hours ago
- Approval request for the tenant is approved
18 hours ago
- Approval request for the tenant is rejected

Activate Windows
Go to Settings to activate Windows.

Lease Management

Tenants property Lease Payment

Tenants > Ajay

Approval History

10 items • Sorted by Is Pending • Updated a few seconds ago

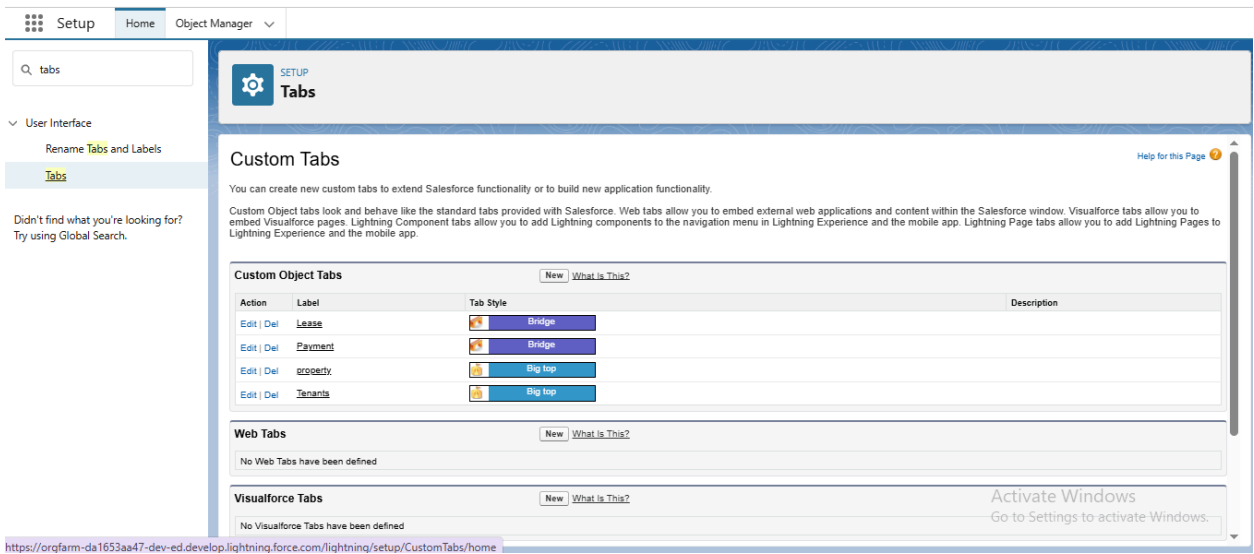
Step Name	Date	Status	Assigned To	Actual Approver	Comments
1 Submit for approval	9/7/2025, 5:20 AM	Approved	Vidarshana M	Vidarshana M	
2 Approval Request Submitted	9/7/2025, 4:53 AM	Submitted	Vidarshana M	Vidarshana M	
3 Approval Request Submitted	9/7/2025, 2:31 AM	Submitted	Vidarshana M	Vidarshana M	Leaving
4 Approval Request Submitted	9/7/2025, 2:31 AM	Approved	Vidarshana M	Vidarshana M	Leaving
5 Approval Request Submitted	9/7/2025, 2:16 AM	Submitted	Vidarshana M	Vidarshana M	
6 Approval Request Submitted	9/7/2025, 2:16 AM	Approved	Vidarshana M	Vidarshana M	
7 Approval Request Submitted	9/7/2025, 2:09 AM	Submitted	Vidarshana M	Vidarshana M	
8 Approval Request Submitted	9/7/2025, 2:09 AM	Approved	Vidarshana M	Vidarshana M	
9 Submit for approval	9/7/2025, 1:11 AM	Approved	Vidarshana M	Vidarshana M	
10 Approval Request Submitted	9/7/2025, 1:10 AM	Submitted	Vidarshana M	Vidarshana M	

Activate Windows
Go to Settings to activate Windows.

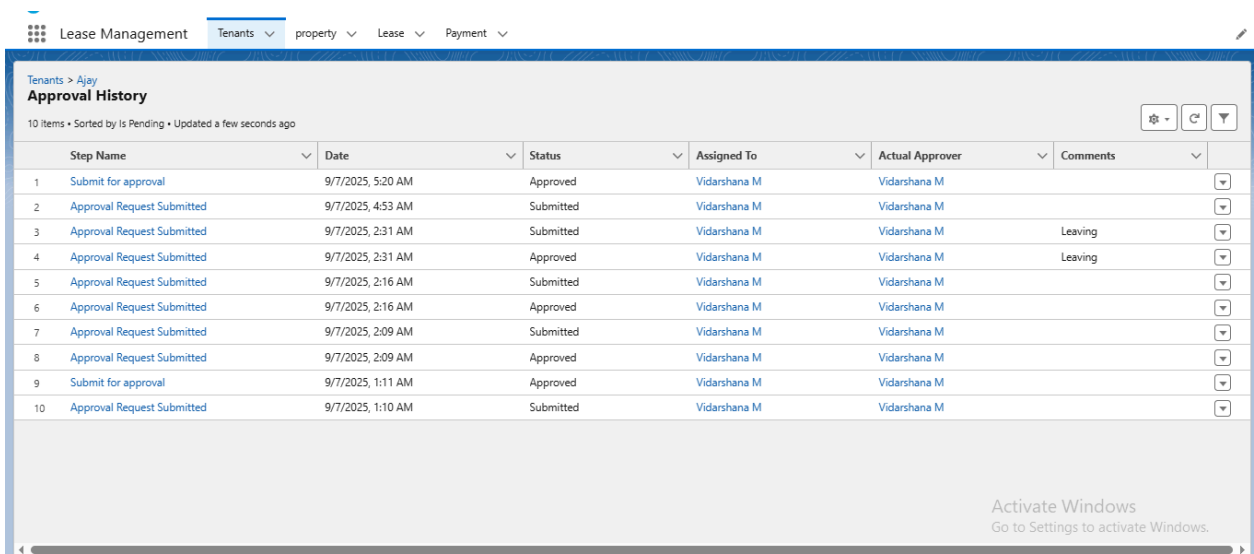
RESULTS

Output Screenshots

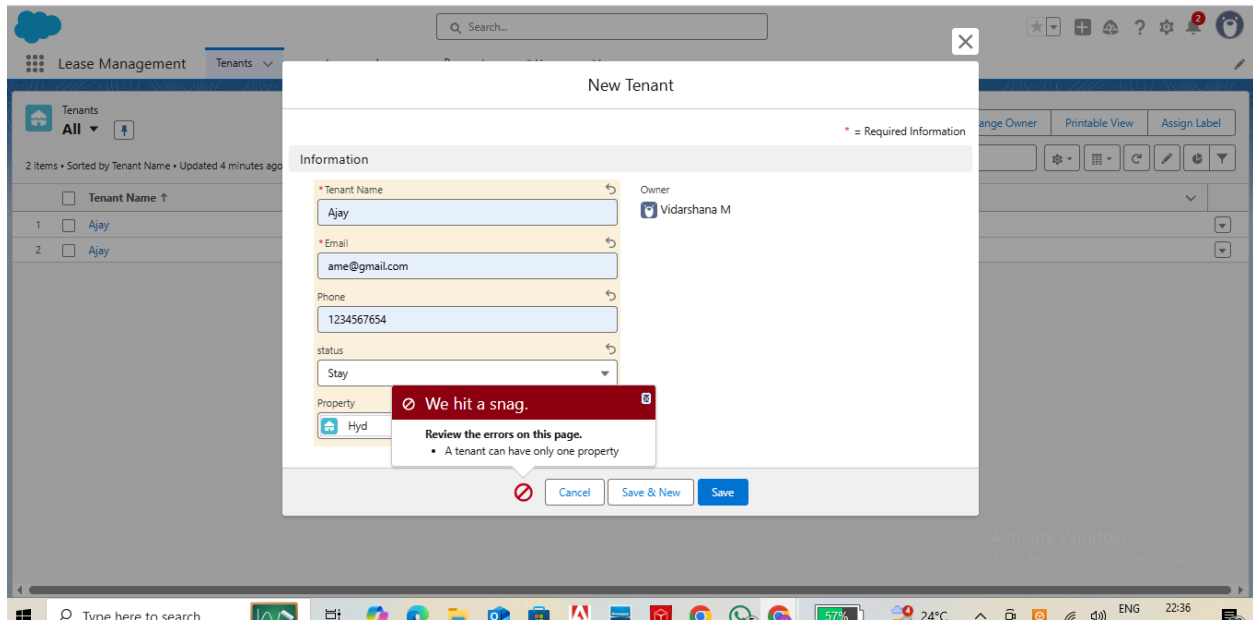
- Tabs for Property, Tenant, Lease, Payment



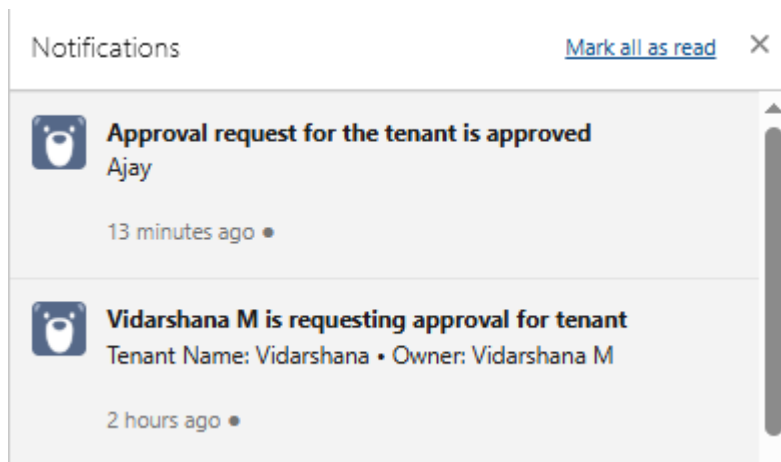
- Email alerts



- Trigger error messages



- Approval process notification



CONCLUSION

The Lease Management System successfully streamlines the operations of leasing through a structured, automated Salesforce application. It improves efficiency, communication, and data accuracy for both admins and tenants.

APPENDIX

- **Source Code:** Provided in Apex Classes and Triggers

Test.apxt:

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

testHandler.apxc:

```
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');

        }

    }

}

```

MonthlyEmailScheduler.apxc:

```

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});
}
}
}
```