

LEASE MANAGEMENT

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Introduction:

Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don't know where you should start on your learning journey? If you've answered yes to any of these questions, then you're in the right place. This module is for you.

Welcome to Salesforce! Salesforce is game-changing technology, within a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module, we'll take you through these features and answer the question, "What is Salesforce, anyway?"

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>

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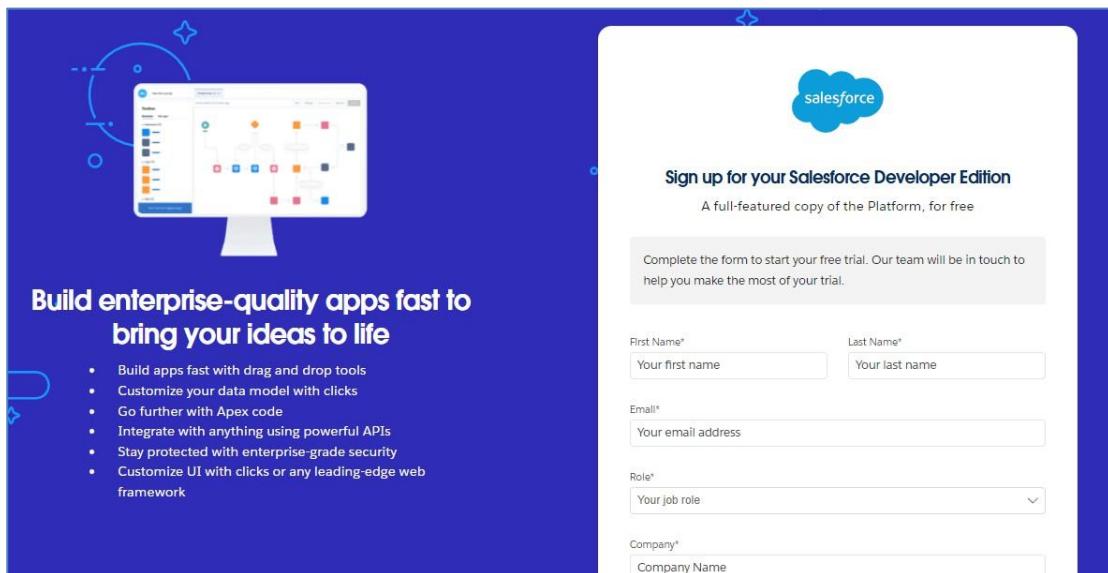
Milestone-1

Salesforce Account

Activity – 1 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:



First Name : THOTHUKA

Last Name : REDDY SPANDANA

Email :spandanathothuka29@gamil.com

Role :Developer

Company : Gayatri Degree College Tirupati

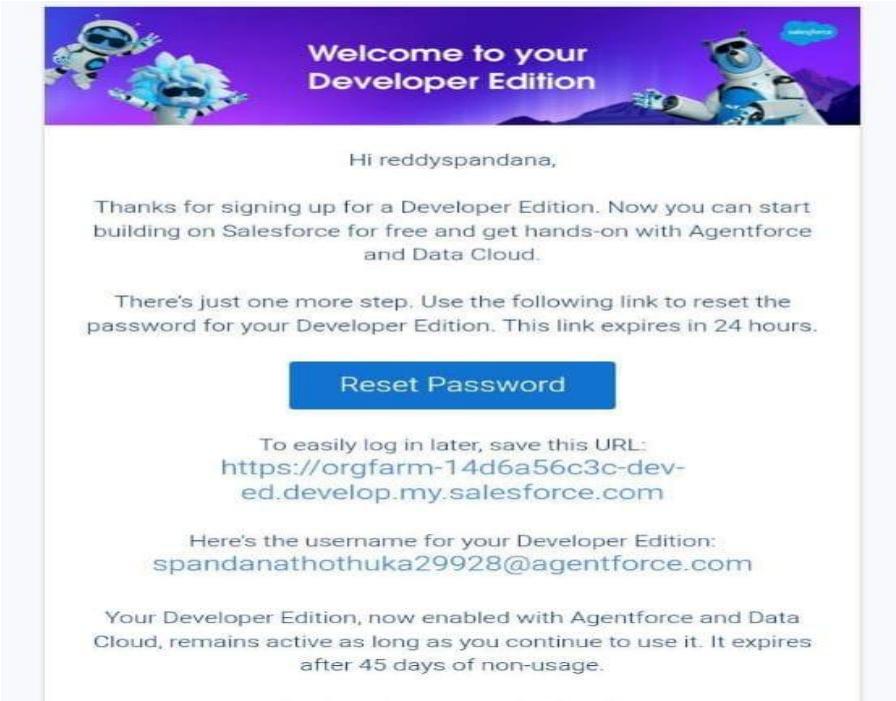
Country : India

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Activity 2: Account Activation:

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 5-10mins.

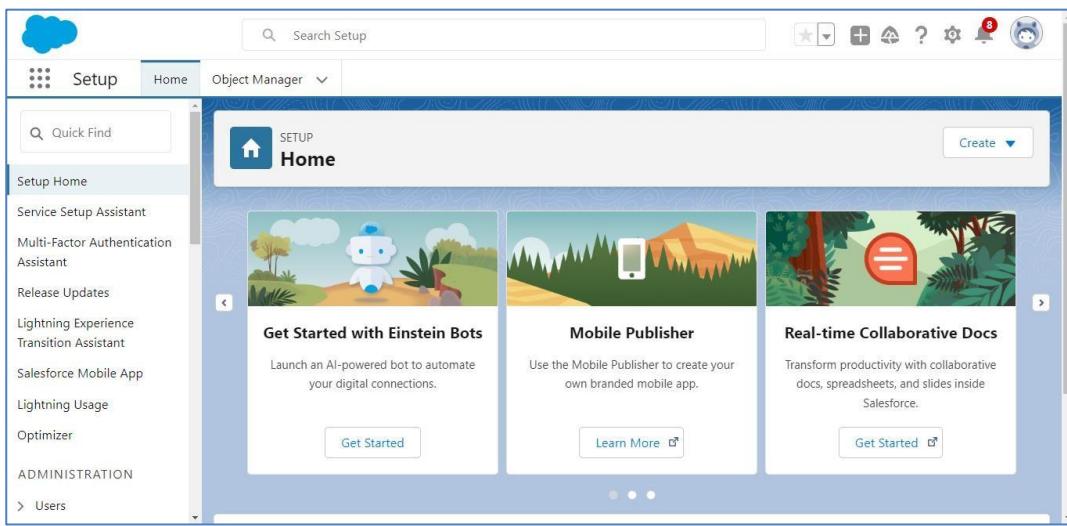


2. Click on Verify Account
3. Give a password and answer a security question and click on change password.

The screenshot shows the "Change Your Password" page. At the top, it says "Change Your Password". Below that, there is a note: "Enter a new password for lead@sb.oom. Make sure to include at least:" followed by three requirements: "8 characters", "1 letter", and "1 number". A red box highlights the "New Password" field, which contains "*****" and is labeled "Good". Another red box highlights the "Confirm New Password" field, which also contains "*****" and is labeled "Match". Below these fields is a "Security Question" section with a dropdown menu showing "In what city were you born?". A red box highlights the "Answer" field, which contains "asdfghjkl". At the bottom is a blue "Change Password" button.

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4. Then you will redirect to your salesforce setup page.



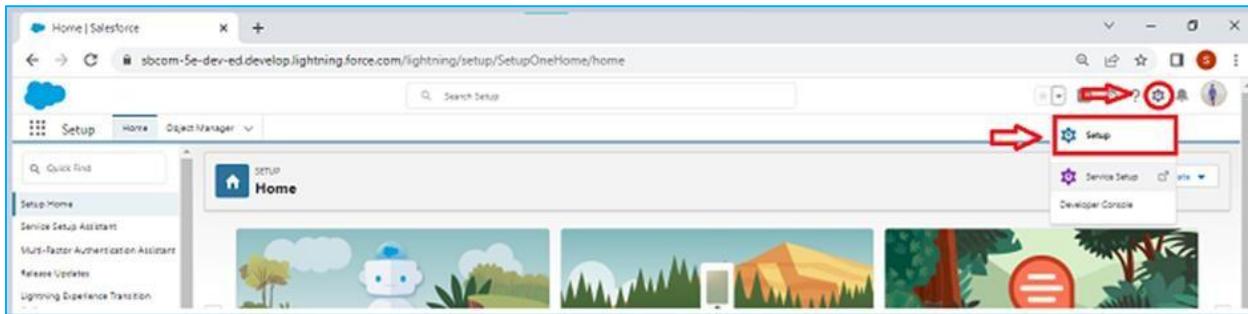
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Milestone-2

Object Creation

Activity – 1: Create Property Object:

To Navigate to Setup page:



To create an object:

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



2. Enter label name as property
3. Enter plural label name as property
4. Enter Record Name as property name
5. Select data type as Text
6. Select Allow reports, Track field history, Allow activities
8. Click on Save and New

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The screenshot shows the Salesforce Setup interface for managing objects. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'SETUP > OBJECT MANAGER' followed by 'property'. On the left, a sidebar lists various configuration tabs: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The 'Details' tab is selected. The main content area is titled 'Enter Record Name Label and Format'. It contains a text input field for 'Record Name' with the placeholder 'property Name' and an example 'Account Name'. Below this is a 'Data Type' dropdown set to 'Text' with a warning message about inserting high volumes via API. Under 'Optional Features', several checkboxes are checked: 'Allow Reports', 'Allow Activities', 'Track Field History', 'Allow in Chatter Groups', and 'Enable Licensing'. The 'Object Classification' section includes checkboxes for 'Allow Sharing', 'Allow Bulk API Access', and 'Allow Streaming API Access'. The 'Deployment Status' section shows a radio button for 'In Development'.

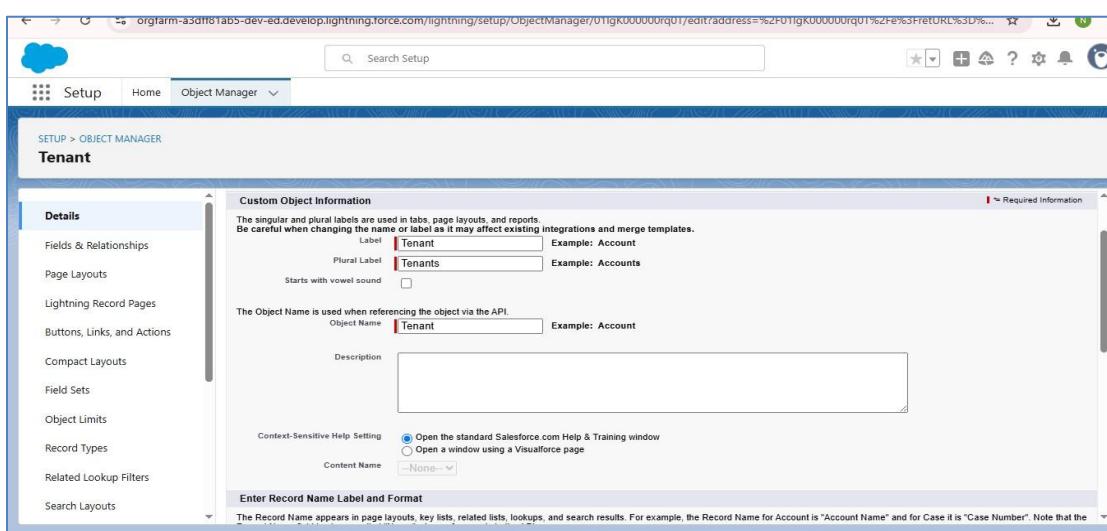
This screenshot shows the same Salesforce Setup interface for the 'property' object, but with different configuration settings. The 'Object Classification' section has different checkboxes checked: 'Allow Activities', 'Track Field History', 'Allow in Chatter Groups', and 'Enable Licensing'. The 'Deployment Status' section shows a radio button for 'Deployed'. The 'Search Status' section includes a checkbox for 'Allow Search'. The bottom of the screen features standard Salesforce save buttons: 'Save', 'Save & New', and 'Cancel'.

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Activity – 2 Create Tenant Object:

From set up page

- 1.Click on ObjectManager
- 2.Click on Create>>Click on Custom Object
- 3.Enter label name asTenant
- 4.Enter plural label name as **Tenants**



- 5.Enter record name as Tenant Name
- 6.Enter data type as Text
- 7.Click on Allow reports, Track field history, Allow activities
- 8.Click on Allow search

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The screenshot shows the Salesforce Setup Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'SETUP > OBJECT MANAGER' followed by 'Tenant'. On the left, a sidebar lists various configuration options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The 'Details' section is currently selected. It contains fields for 'Record Name' (set to 'Tenant Name') and 'Data Type' (set to 'Text'). A note states: '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.' Below this is the 'Optional Features' section, which includes checkboxes for 'Allow Reports', 'Allow Activities', 'Track Field History', 'Allow in Chatter Groups', and 'Enable Licensing'. The 'Object Classification' section includes checkboxes for 'Allow Sharing', 'Allow Bulk API Access', and 'Allow Streaming API Access'. The 'Deployment Status' section shows 'Deployed' as the status. At the bottom right, there is a 'What is this?' link.

9. Click on Save and New

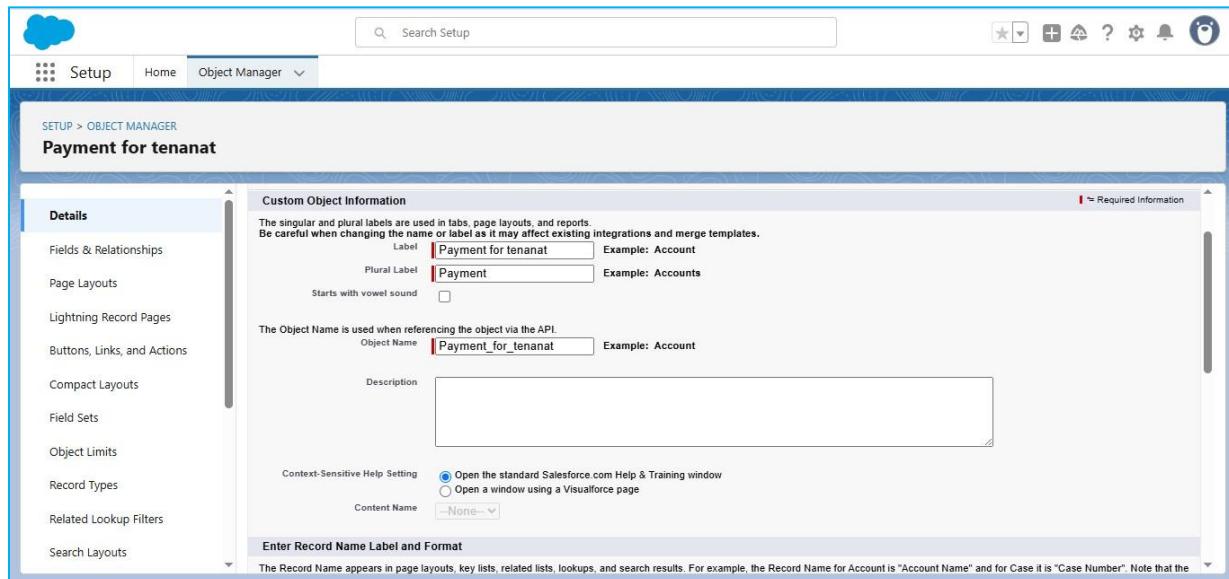
This screenshot shows the same Salesforce Setup Object Manager interface as the previous one, but with some changes. The 'Optional Features' section now has 'Allow in Chatter Groups' checked. The 'Object Classification' section has 'Allow Bulk API Access' and 'Allow Streaming API Access' checked. The 'Deployment Status' section shows 'Deployed' as the status. The 'Search Status' section has 'Allow Search' checked. At the bottom, there are three buttons: 'Save', 'Save & New', and 'Cancel'. The 'Save & New' button is highlighted.

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Activity - 3 Create Payment Object:

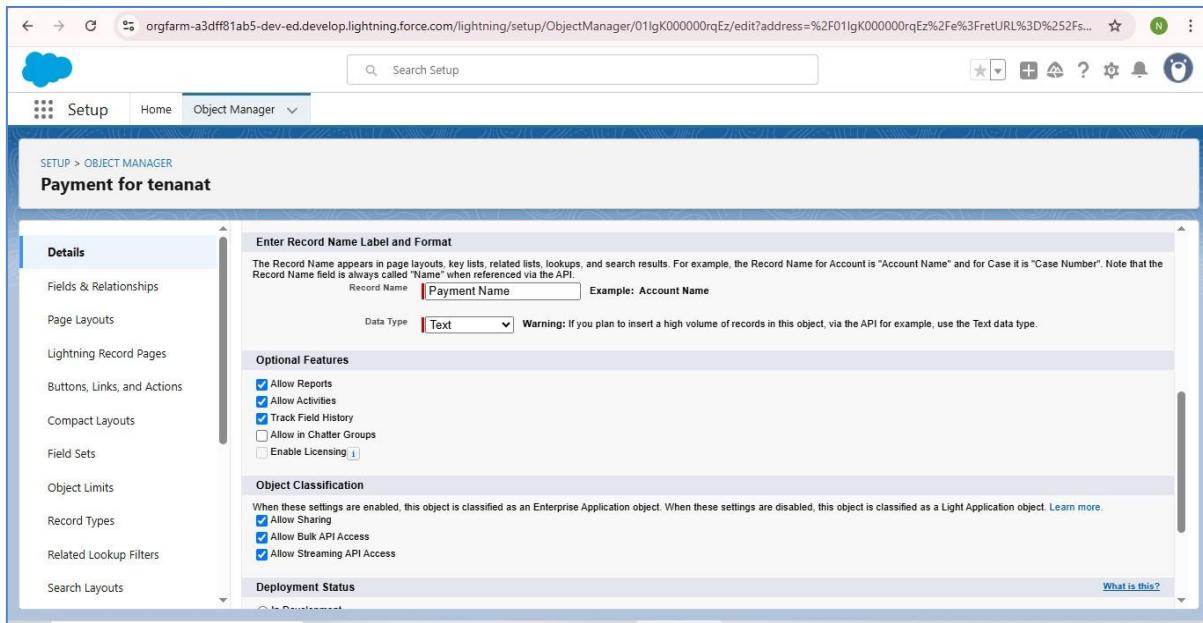
From set up page

1. Click on Object Manager
2. Click on Create > Click on Custom Object
3. Enter label name as Payment for tenant
4. Enter plural label name as Payment



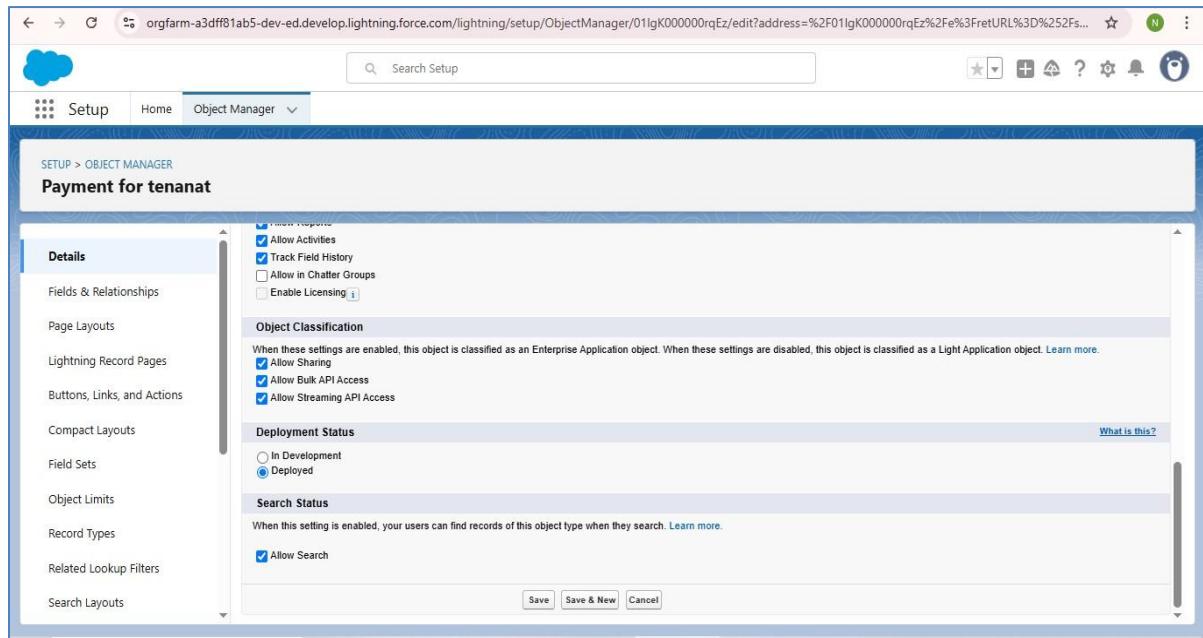
5. Enter record name as Payment Name
6. Enter data type as Text
7. Click on Allow reports, Track field history, Allow activities

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8. Click on Allow Search

9. Click on Save And New

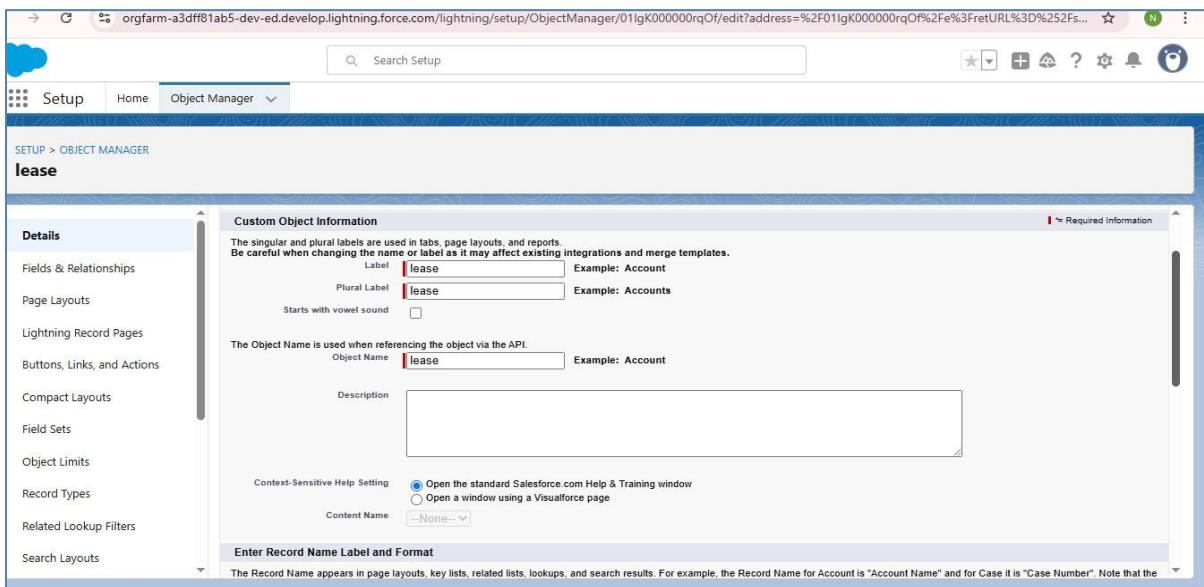


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Activity – 4 Create Lease Object:

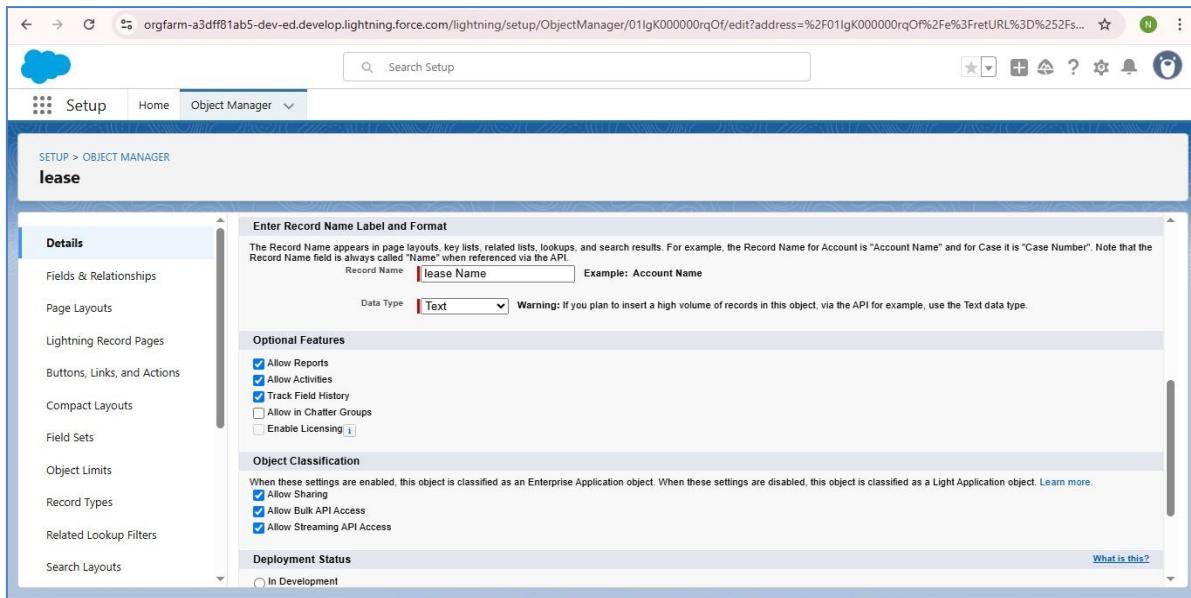
From set up page

- 1.Click on Object Manager
- 2.Click on Create>>Click on Custom Object
- 3.Enter label name as lease
- 4.Enter plural label name as lease



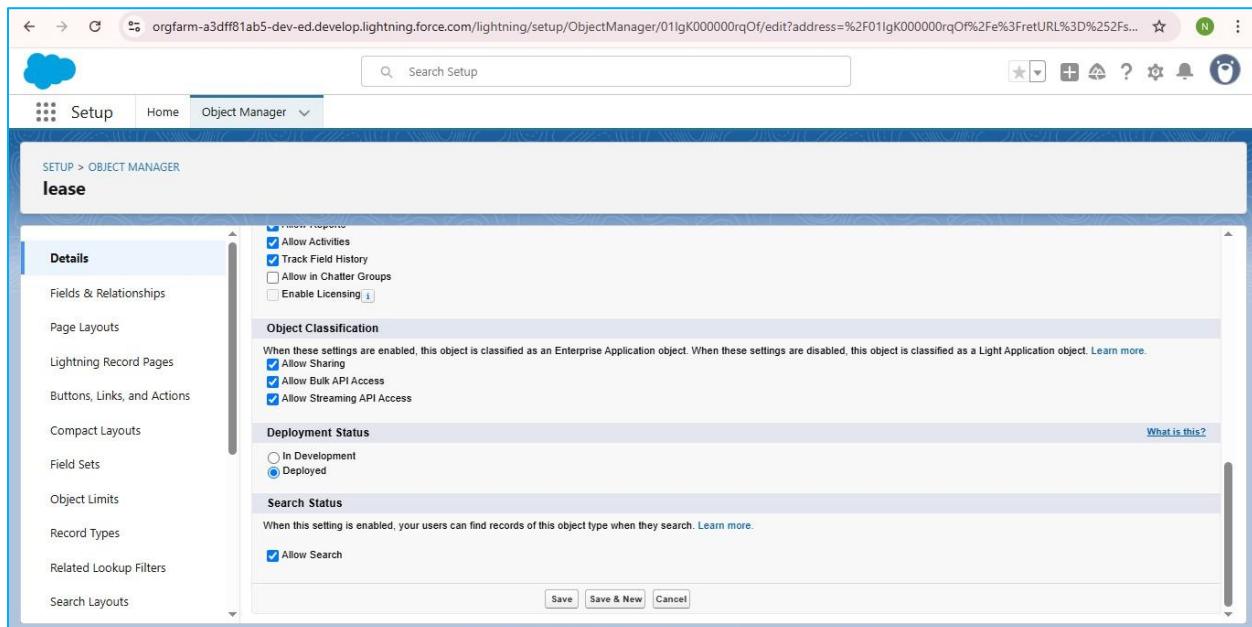
- 5.Enter record name as lease Name
- 6.Enter data type as Text
- 7.Click on Allow reports, Track field history, Allow activities

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8.Click on Allow search

9.Click on Save and New



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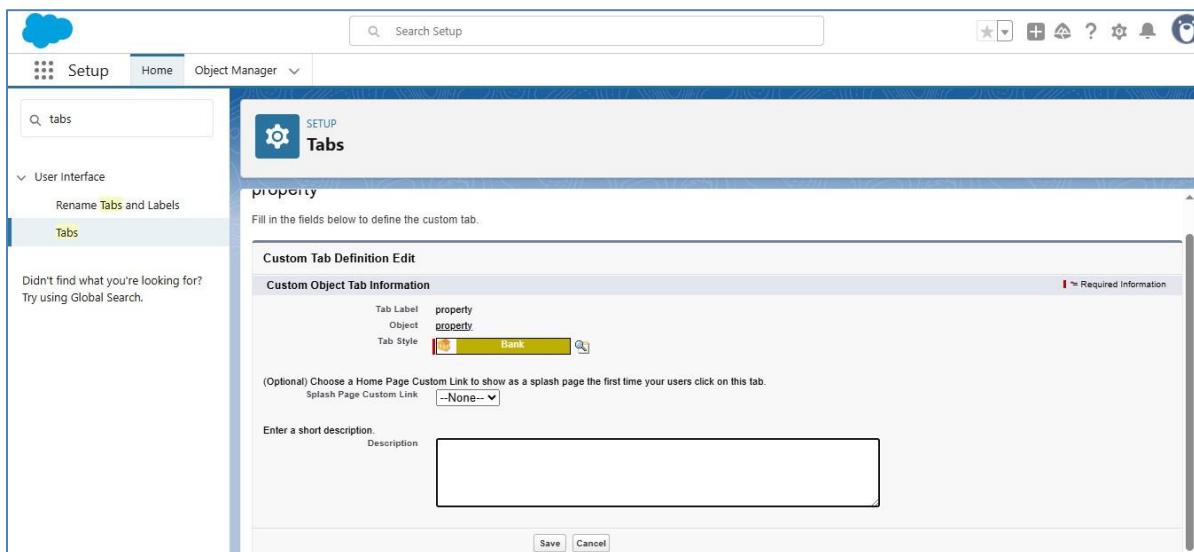
Milestone-3

Tab Creation

Activity - 1 To create a Tab:(Property)

From set up page

1. Search for Tabs in the Quick find box
2. Click on tabs
3. Click on New under custom object tab
4. Select object Property >>Select the tab style



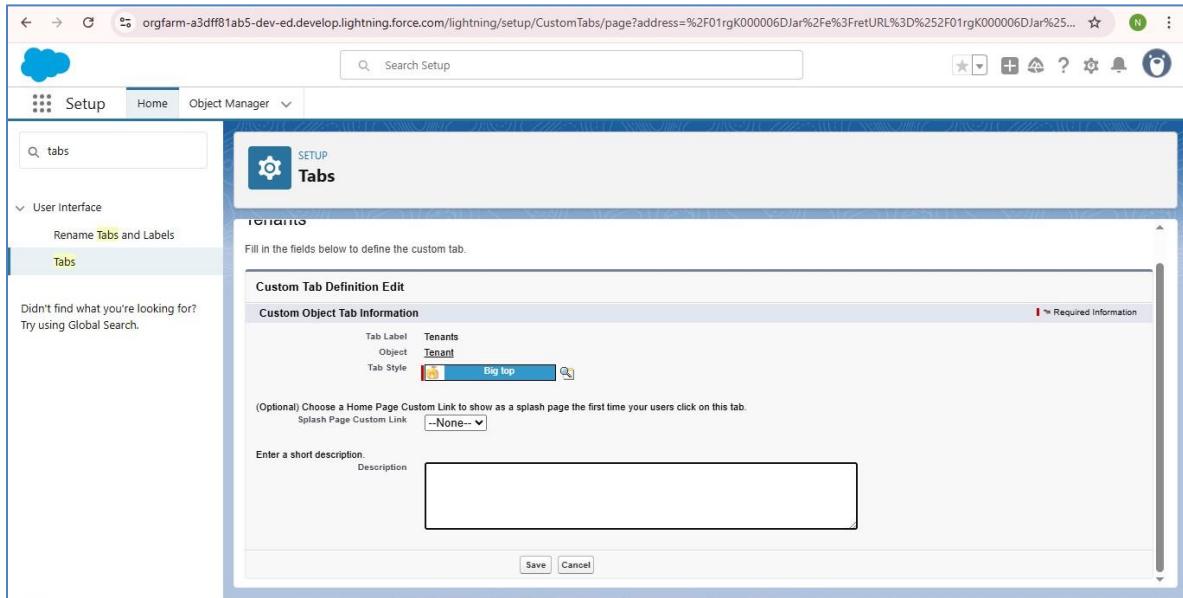
5. Click on next>> (Add to profile page) keep it as default>>Click on Next (Add to custom app) Uncheck the include tab.
6. Make sure that the Append to tab user's existing personal customizations is checked
7. Click on Save

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Activity – 2 To create a Tab:(Tenant)

From set up page

1. Search for Tabs in the Quick find box
2. Click on tabs
3. Click on New under custom object tab
4. Select object Tenant > Select the tab style



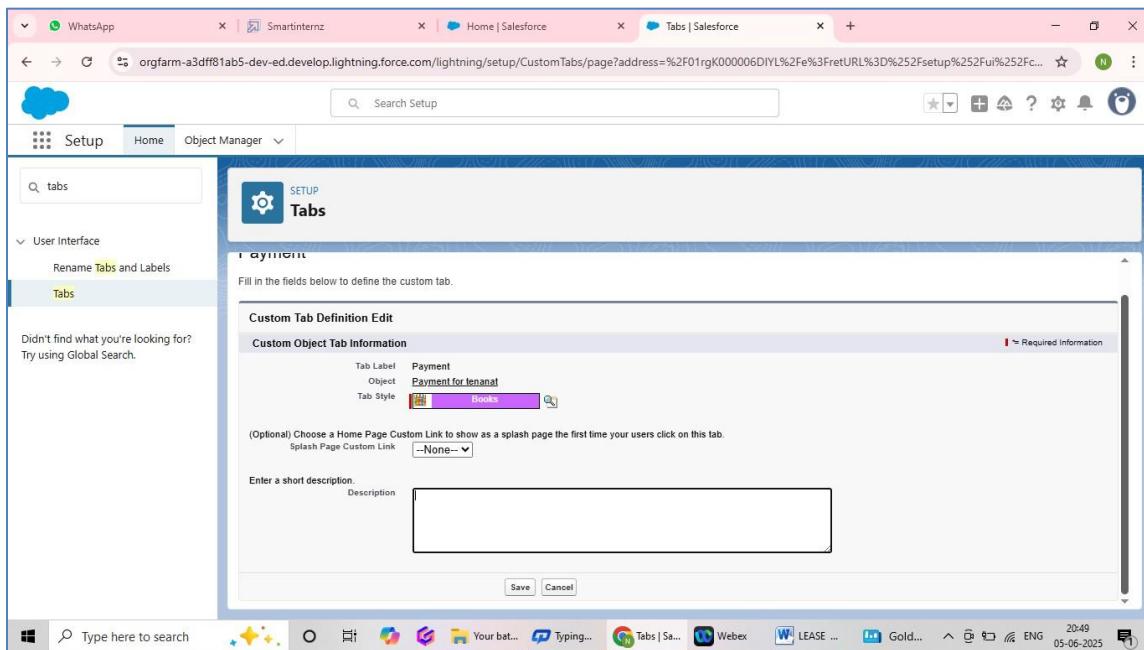
5. Click on next>> (Add to profile page) keep it as default>>Click on Next (Add to custom app) Uncheck the include tab.
6. Make sure that the Append to tab user's existing personal customizations is checked
7. Click on Save

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Activity – 3 To create a Tab:(Payment for tenants)

From set up page

1. Search for Tabs in the Quick find box
2. Click on tabs
3. Click on New under custom object tab
4. Select object Payment for tenant>>Select the tab style



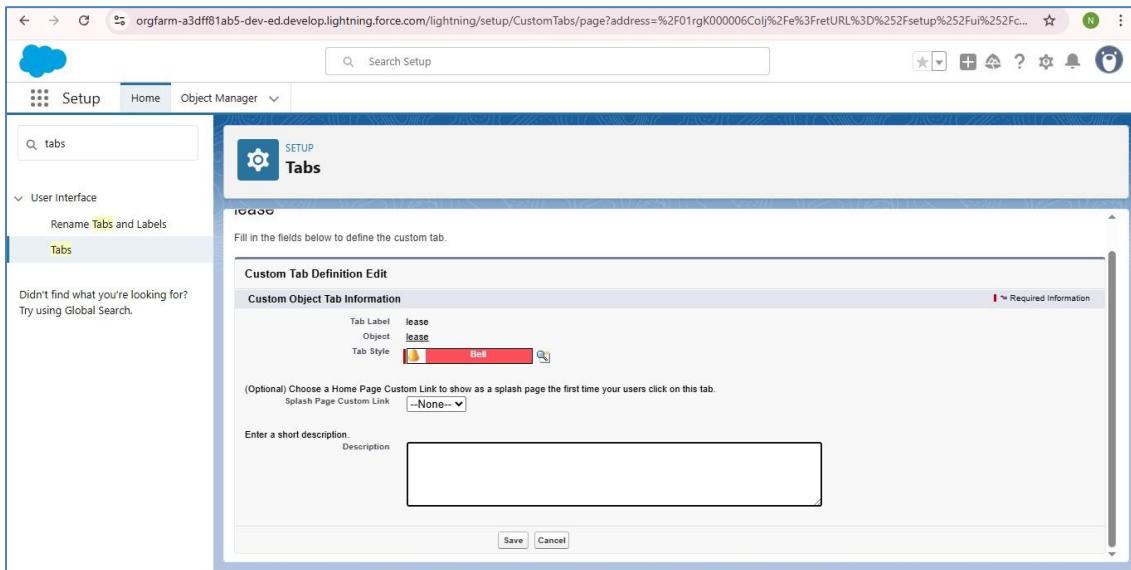
5. Click on next>> (Add to profile page) keep it as default>>Click on Next (Add to custom app) Uncheck the include tab.
6. Make sure that the Append to tab user's existing personal customizations is checked
7. Click on Save

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Activity – 4 To create a Tab:(lease)

From set up page

1. Search for Tabs in the Quick find box
2. Click on tabs
3. Click on New under custom object tab
4. Select object lease >> Select the tab style



5. Click on next>> (Add to profile page) keep it as default>>Click on Next (Add to custom app) Uncheck the include tab.
6. Make sure that the Append to tab user's existing personal customizations is checked
7. Click on Save

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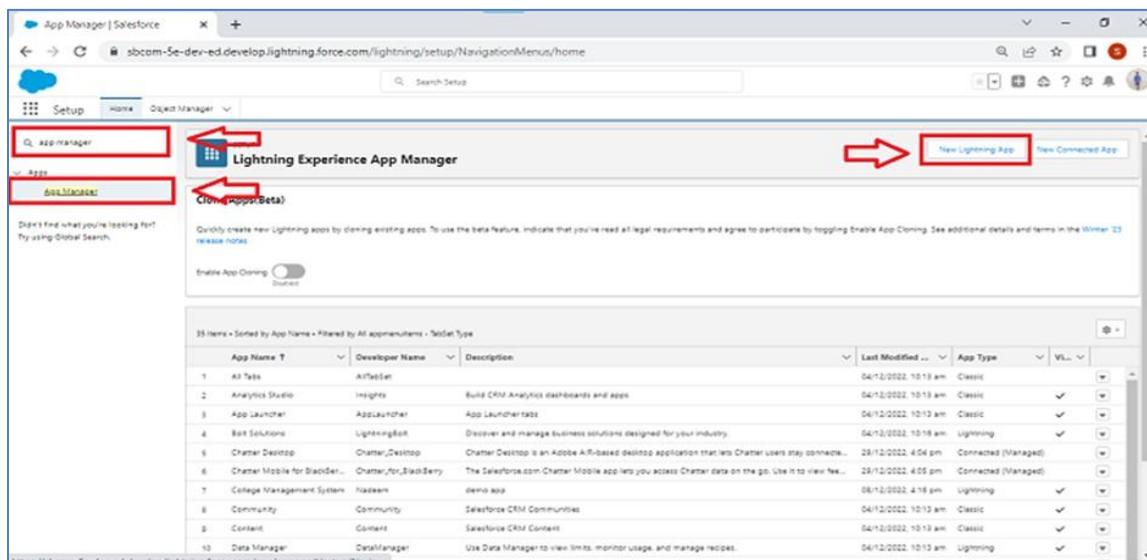
Milestone – 4

The Lightning App

Activity – 1 To create a lightning app page:

From the set up

1. Search AppManager in the Quick find box >> Select AppManager >> Click on New Lightning App



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

App Name: Lease Management

Developer Name: This will auto populated

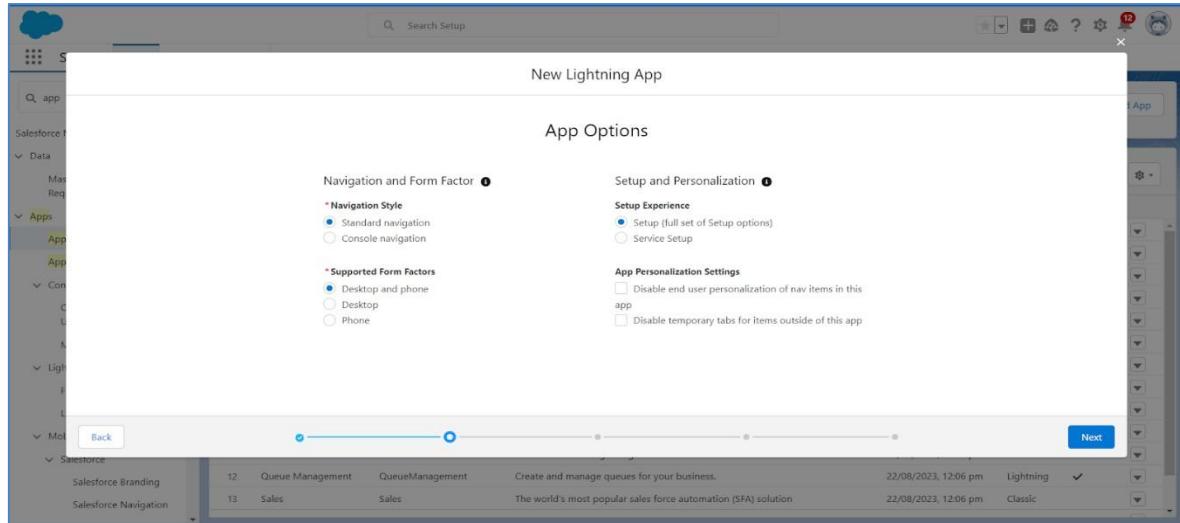
Image: optional (if you want to give any image you can otherwise not

(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.

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4. To Add Navigation Items:

The screenshot shows the 'Navigation Items' section in the Lightning App Builder. The left sidebar has 'Navigation Items' selected. The main area displays 'Available Items' on the left and 'Selected Items' on the right. The 'Available Items' list includes: Accounts, Activation Targets, Activations, All Sites, Alternative Payment Methods, Analytics, App Launcher, and Appointment Categories. The 'Selected Items' list contains three items: 'Payment' (with a purple icon), 'property' (with a yellow icon), and 'lease' (with a red icon). Arrows between the two columns allow users to move items between them.

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.

5. To Add User Profiles:

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The screenshot shows the 'Lease Management' app settings in the Lightning App Builder. The 'User Profiles' section is selected. On the left, there's a sidebar with 'App Settings' and 'User Profiles'. The main area has two sections: 'Available Profiles' (left) and 'Selected Profiles' (right). In 'Available Profiles', there's a search bar and a list of profiles: Analytics Cloud Integration User, Analytics Cloud Security User, Anypoint Integration, Authenticated Website, Authenticated Website, B2B Reordering Portal Buyer Profile, Contract Manager, Custom: Marketing Profile, and Custom: Sales Profile. In 'Selected Profiles', the profile 'System Administrator' is listed. There are arrows between the two sections to move profiles between them.

Search profiles (System administrator) in the search bar >> click on the arrow button >> save & finish.

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Milestone – 5

Fields

Activity – 1 To create fields in an object:

From set up

1. Click on Object Manager >> type Object name (property) in search bar >> Click on the object

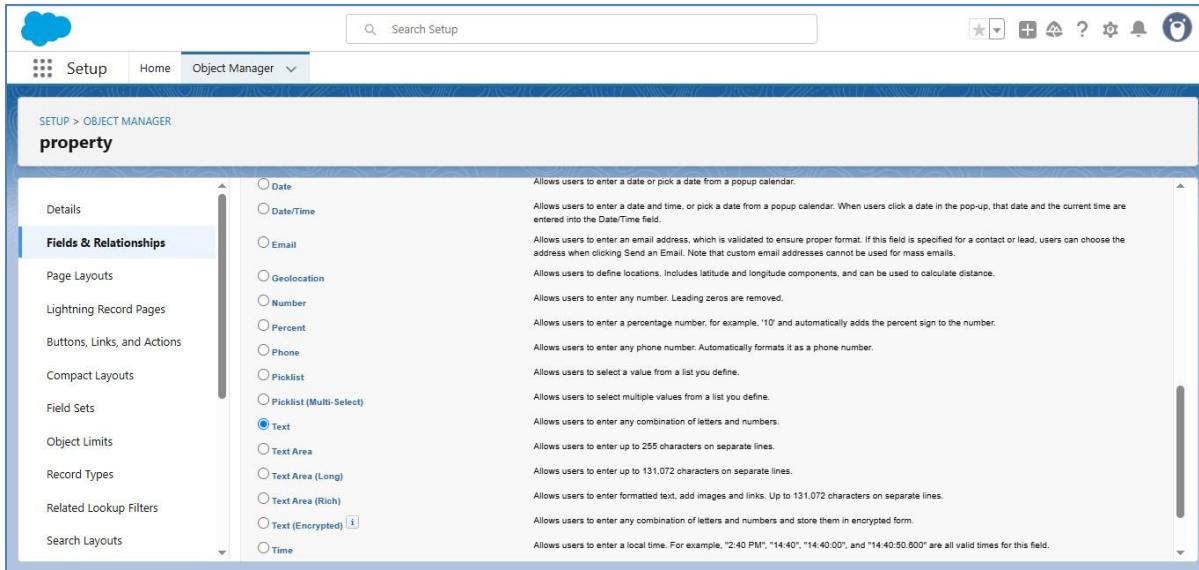
The screenshot shows the Salesforce Object Manager interface. At the top, there's a search bar with 'property' typed into it. Below the search bar, there's a 'Schema Builder' button and a 'Create' button. The main area displays a table with one item. The columns are labeled: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The single item listed is 'property' with API name 'property__c', Type 'Custom Object', and Last Modified date '6/3/2025'. There's a small checkmark icon under the Deployed column.

2. Click on Fields and Relationships >> New

The screenshot shows the 'Fields & Relationships' page for the 'property' object. On the left, there's a sidebar with various options like Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main area has a title 'Fields & Relationships' with a subtitle '8 Items, Sorted by Field Label'. It includes a 'Quick Find' search bar and buttons for 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking'. The data is presented in a table with columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The table contains eight rows corresponding to the fields of the 'property' object.

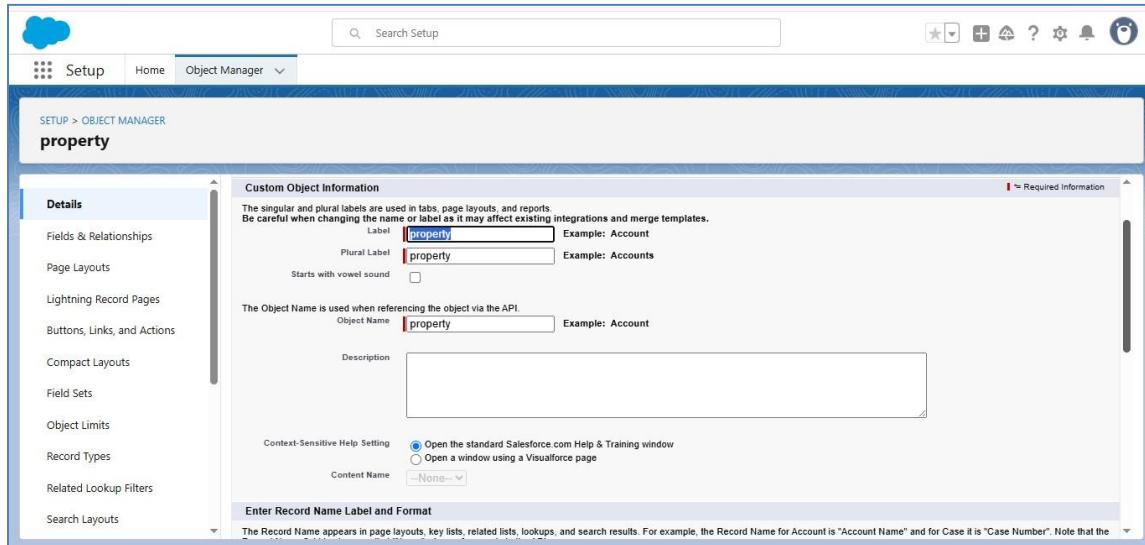
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3. Select data type as Text



The screenshot shows the Salesforce Setup interface under the Object Manager. On the left, a sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main pane displays a list of field types. The 'Text' option is selected, highlighted with a blue circle. A detailed description of the 'Text' field is provided on the right, stating it allows users to enter any combination of letters and numbers, with a maximum length of 255 characters.

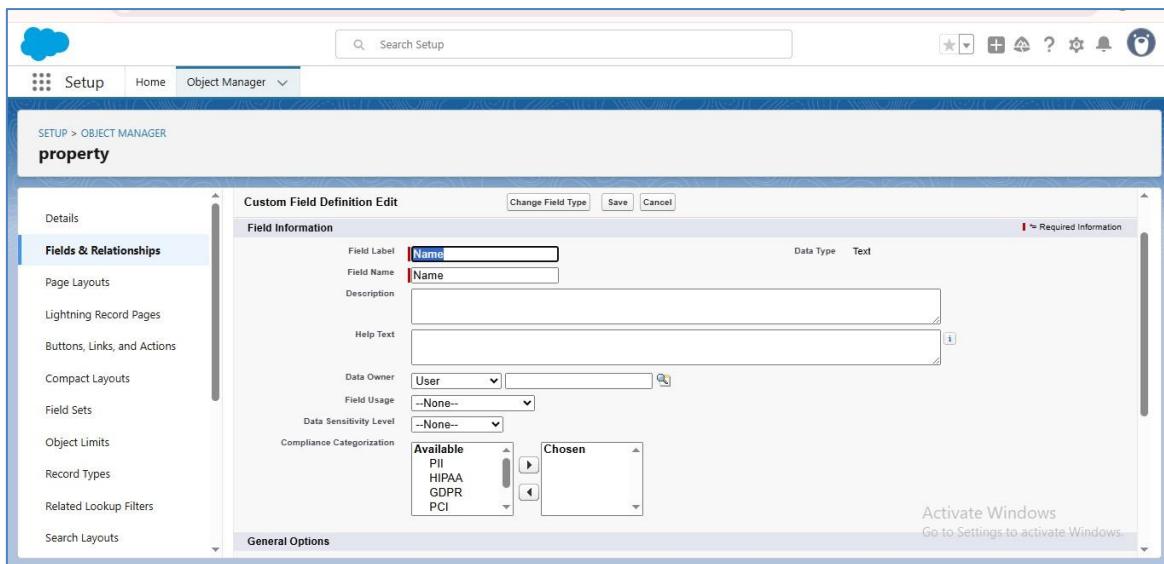
4. Click on next



The screenshot shows the 'Custom Object Information' configuration page for the 'property' object. It includes fields for Label (set to 'property'), Plural Label (set to 'property'), and Object Name (set to 'property'). The 'Object Name' field is highlighted with a red border. Other settings include Context-Sensitive Help Setting (set to 'Open the standard Salesforce.com Help & Training window') and Content Name ('None'). A note at the bottom states that the Record Name appears in page layouts, key lists, related lists, lookups, and search results.

- Enter field label as Name
- Field name will be auto generated
- Length:25
- Required:Check box

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5. Click on Next>>Next>>Save and New

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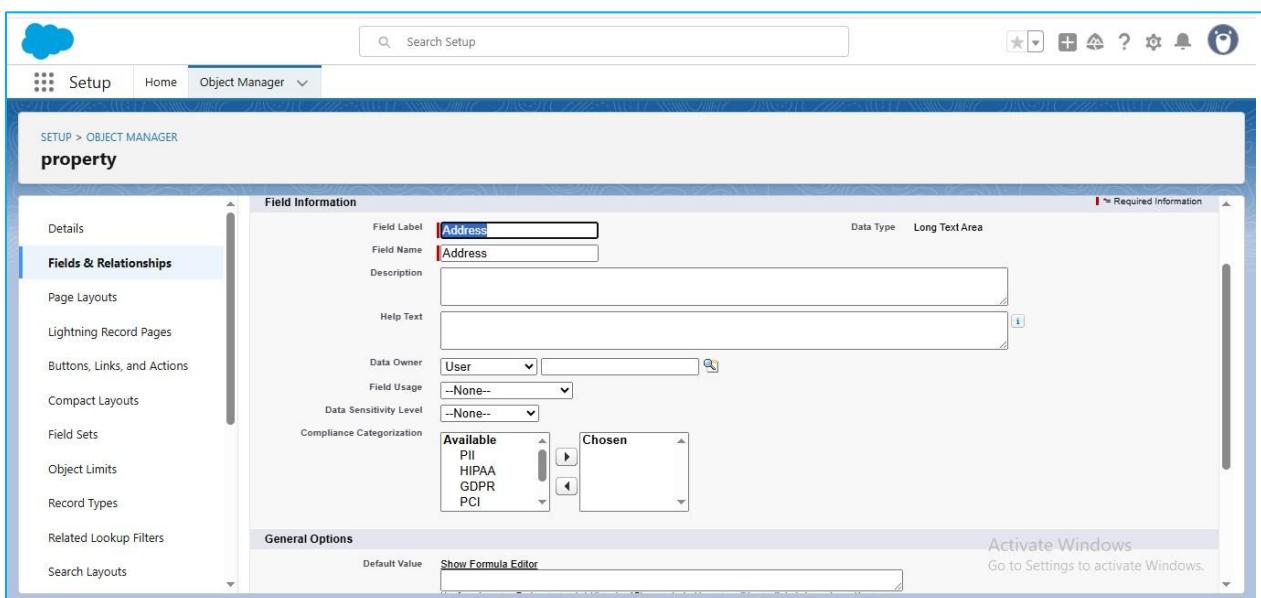
To create another fields in an object:

From the set up

- 1.Click on ObjectManager>>type object name(property)in search bar>>Click on the object
- 2.Click on Fields and 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

To create another fields in an object

From the set up

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- 5.Click on ObjectManager>>type object name(property)in search bar>>Click on the object
- 6.Click on Fields and Relationships>>New
- 7.Select data type as “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

The screenshot shows the Salesforce Object Manager interface. The left sidebar has a tree view with 'Object Manager' selected. The main area is titled 'property'. On the left, a vertical sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The 'Fields & Relationships' option is currently selected. The right pane is titled 'Field Information' and contains the following fields:

- Field Label: Type
- Field Name: Type
- Description: (empty)
- Help Text: (empty)
- Data Owner: User
- Field Usage: --None--
- Data Sensitivity Level: --None--
- Compliance Categorization:
 - Available: PII, HIPAA, GDPR, PCI
 - Chosen: (empty)

At the bottom, there are 'General Options' with 'Required' checked and 'Default Value' set to 'Show Formula Editor'. A message at the bottom right says 'Activate Windows'.

- 9.Click on Next>>Next>>Save and New

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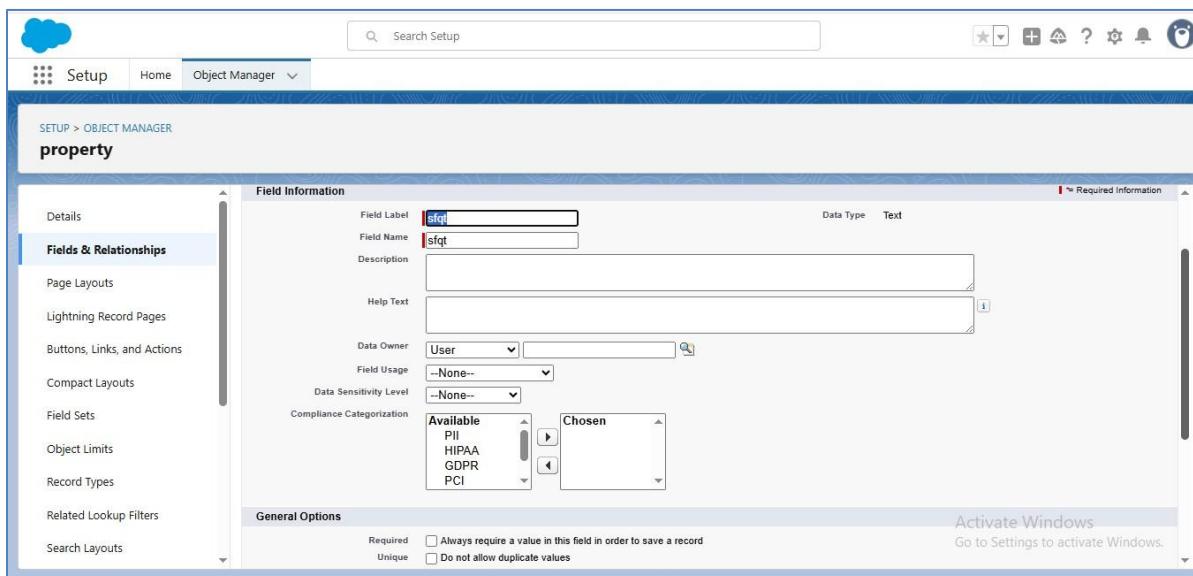
To create other fields in an object

From the set up

1. Click on Object Manager >> type object name(property) in search bar >> Click on the object
2. Click on Fields and Relationships >> New
3. Select data type as "Text" and click on Next

Fill the above as following

- Field label: sfqt
- Field Name: gets auto generated
- Length: 18



4. Click on Next >> Next >> Save

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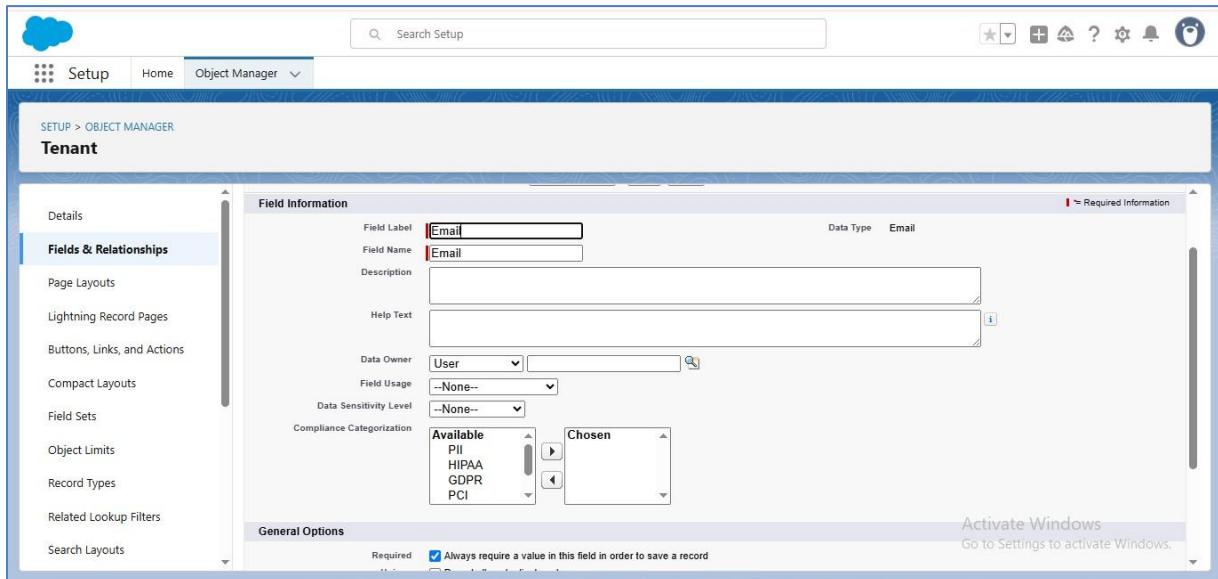
Activity – 2 Creation of fields for the Tenant object

To create another fields in an object

From the set up

- 1.Click on Object Manager>>type object name(property)in search bar>>Click on the object
- 2.Click on Fields and Relationships>>New
- 3.Select data type as a “Email” and click on next
- 4.Fill the Above as following:

- Field label: Email
- Field Name: gets auto generated
- Click on required check box



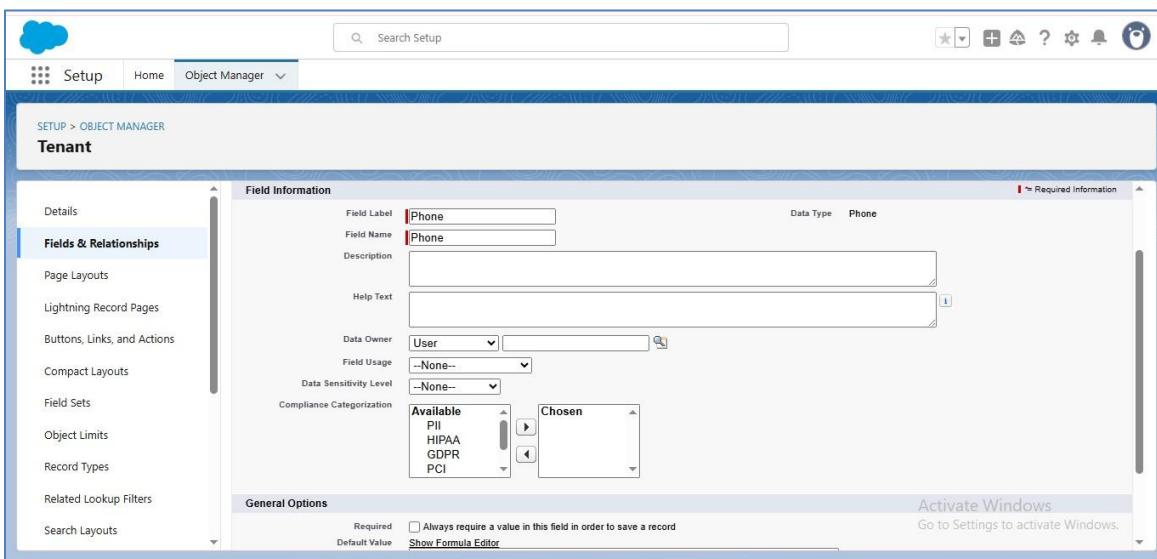
- 6.Click on Next>>Next>>Save and New

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To create another fields in an object

From the set up

- 1.Click on Object Manager>>type object name(property)in search bar>>Click on the object
- 2.Click on Fields and Relationships>>New
- 3.Select data type as a “phone” and click on next
- 4.Fill the Above as Following:
 - Field label: Phone
 - Field Name: gets auto generated



Click on Next>>Next>>Save and New

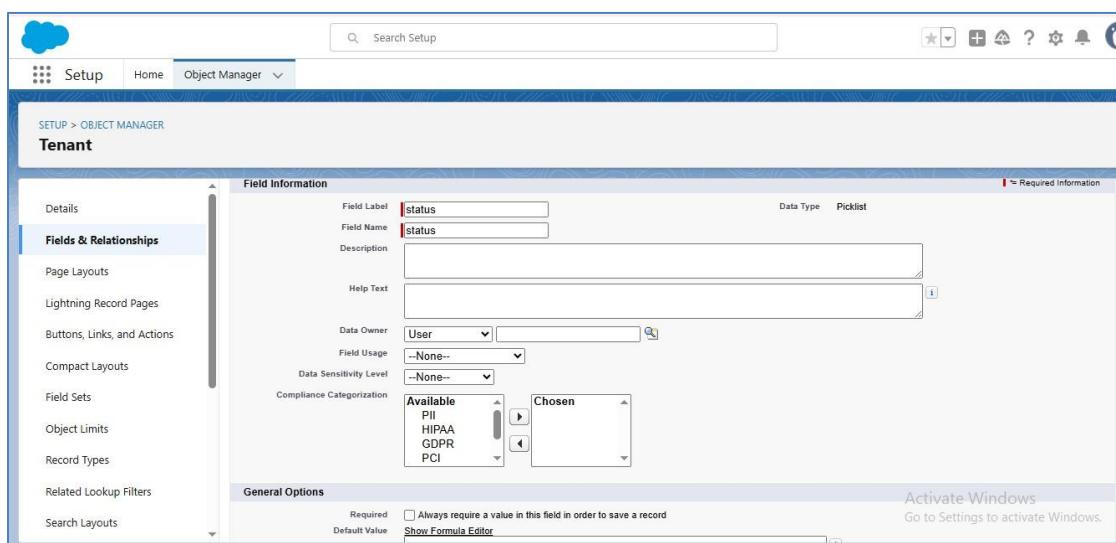
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To create another fields in an object

From the set up

- 1.Click on Object Manager>>type object name(property)in search bar>>Click on the object
- 2.Click on Fields and Relationships>>New
- 3.Select data type as "Picklist" and click on next
- 4.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



Click on Next>>Next>>Save and New

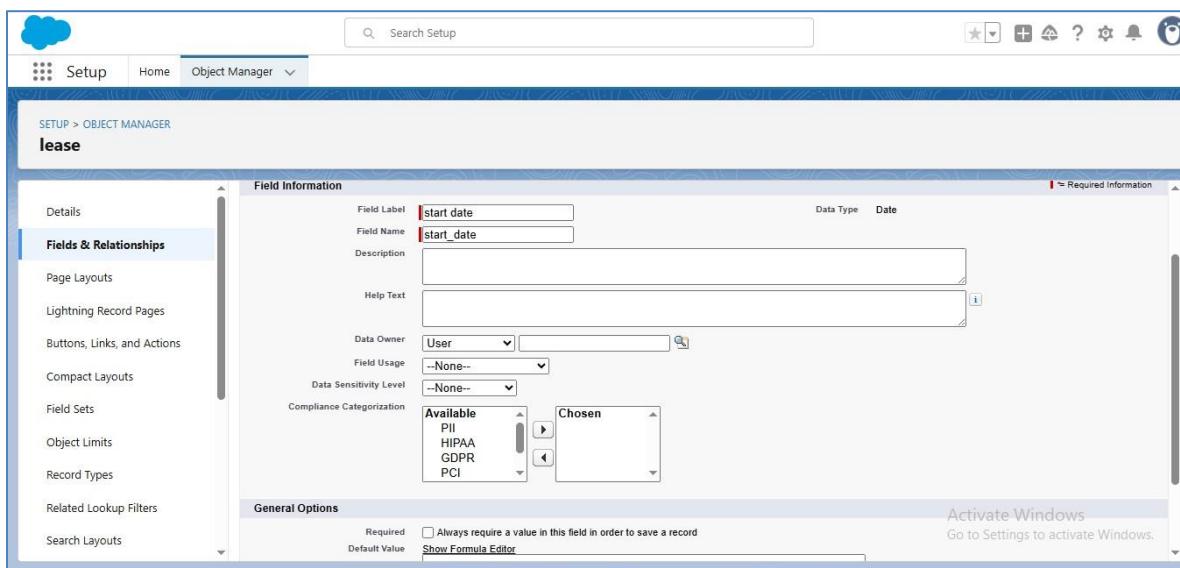
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Activity – 3 Creation of fields for the Lease object

To create another fields in an object

From the set up

1. Click on Object Manager >> type object name(property) in search bar >> Click on the object
2. Click on Fields and Relationships >> New
3. Select data type as “Date” and click on Next
4. Fill the Above as Following:
 - Field label: start date
 - Field Name: gets auto generated



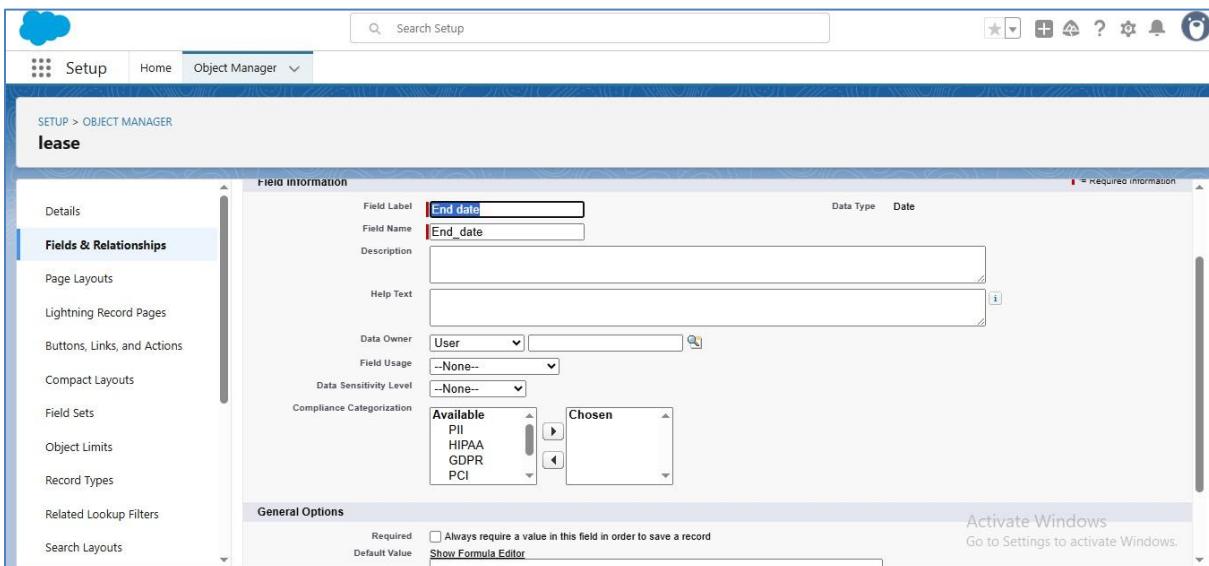
Click on Next >> Next >> Save and New

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To create another fields in an object

From the set up

1. Click on Object Manager >> type object name(property) in search bar >> Click on the object
2. Click on Fields and Relationships >> New
3. Select data type as "Date" and click on Next
4. Fill the Above as Following:
 - Field label: end date
 - Field Name: gets auto generated



Click on Next > Next > Save and New

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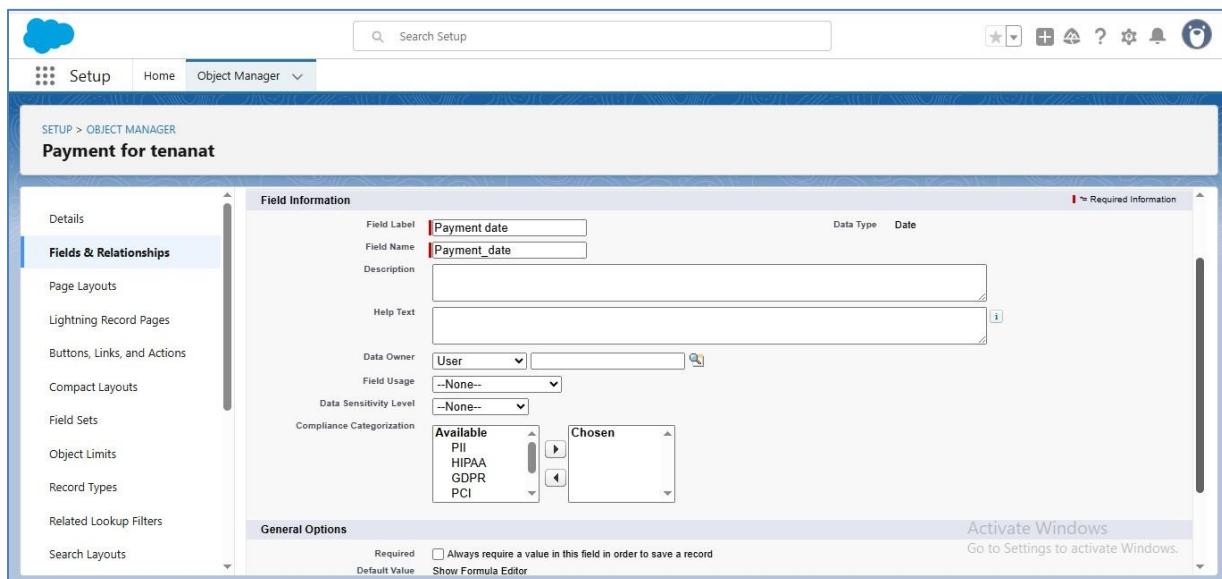
Activity – 4 Creation of fields for the Payment for tenant object:

To create another fields in an object

From the set up

1. Click on Object Manager >> type object name(property) in search bar >> Click on the object
2. Click on Fields and Relationships >> New
3. Select data type as "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

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To create another fields in an object

From the set up

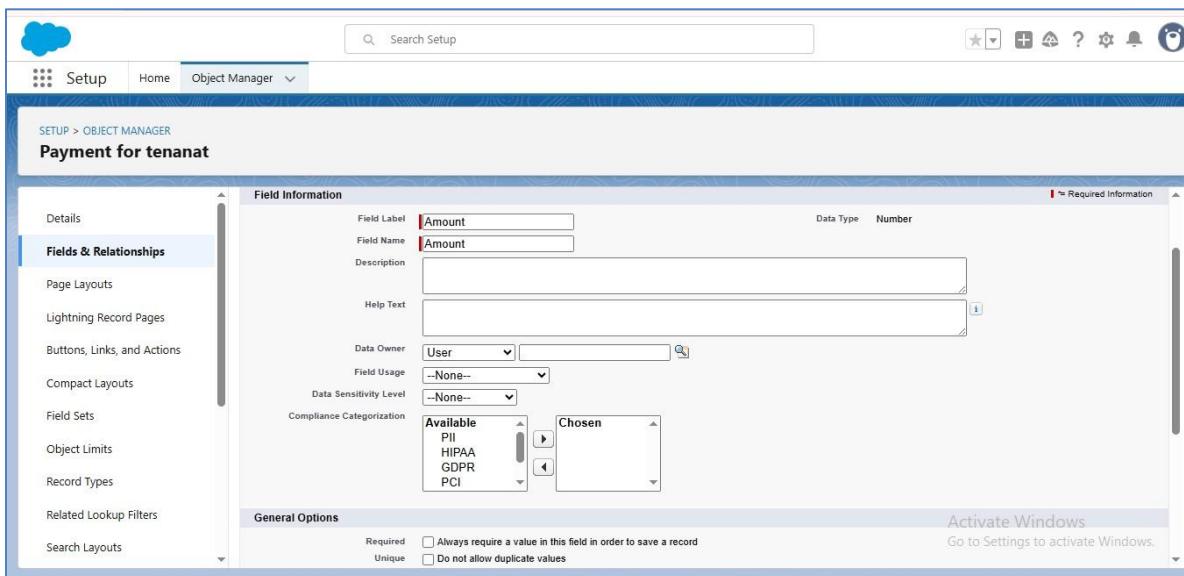
1.Click on Object Manager>>type object name(property)in search bar>>Click on the object

2.Click on Fields and Relationships>>New

3.Select data type as "Number" and click on Next

4.Fill the Above as Following:

- Field label: Amount
- Length:18
- Field Name: gets auto generated



5.Click on Next>>Next>>Save and New

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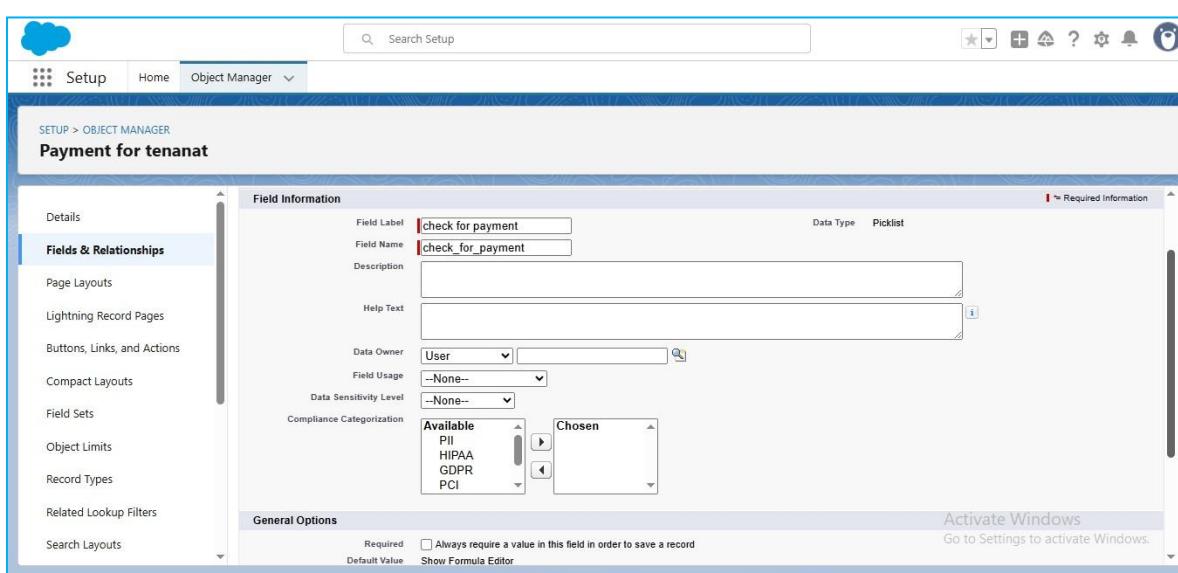
To create another fields in an object

From the set up

- 1.Click on Object Manager>>type object name(property)in search bar>>Click on the object
- 2.Click on Fields and Relationships>>New
- 3.Select data type as "Picklist" and click on Next

Field label: check for payment

Field Name: gets auto generated



Enter values with each value separated by a new line

- Paid
- Not paid

Click on Next>>Next>>Save and New

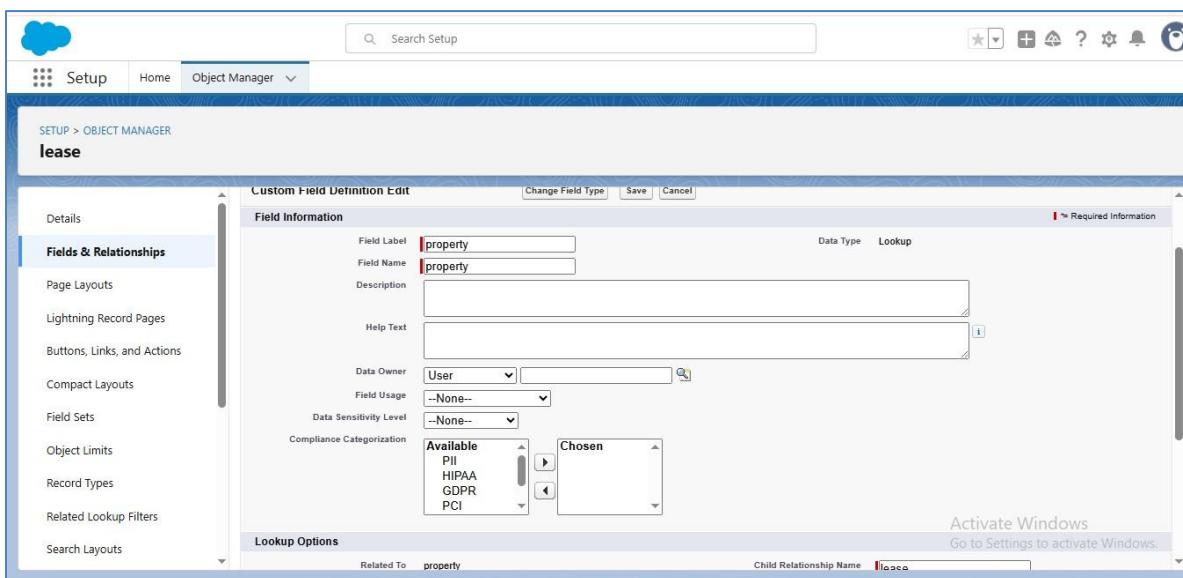
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Activity – 5 Creation of Lookup fields:

Creation of Look up field on lease object:

From the set up

- 1.Click on Object Manager>>type object name(property)in search bar>>Click on the object
- 2.Click on Fields and Relationships>>New
- 3.Select look up relationship
- 4.Select the related object “property” and click on next
 - Field label: property
 - Field Name: gets auto generated



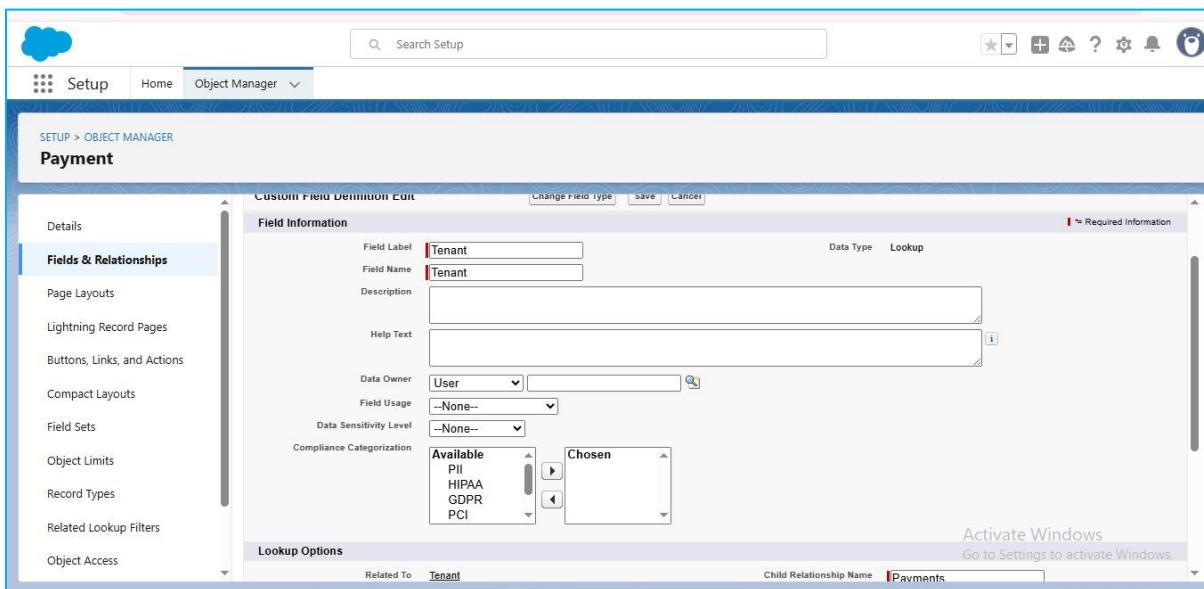
- 5.Click on Next>>Next>>Save and New

LEASE MANAGEMENT

Creation of Look up field on Payment object:

From the set up

- 1.Click on Object Manager>>type object name(property)in search bar>>Click on the object
- 2.Click on Fields and Relationships>>New
- 3.Select look up relationship
- 4.Select the related object “Tenant” and click on next
 - Field Name: Tenant
 - Field label: gets auto generated



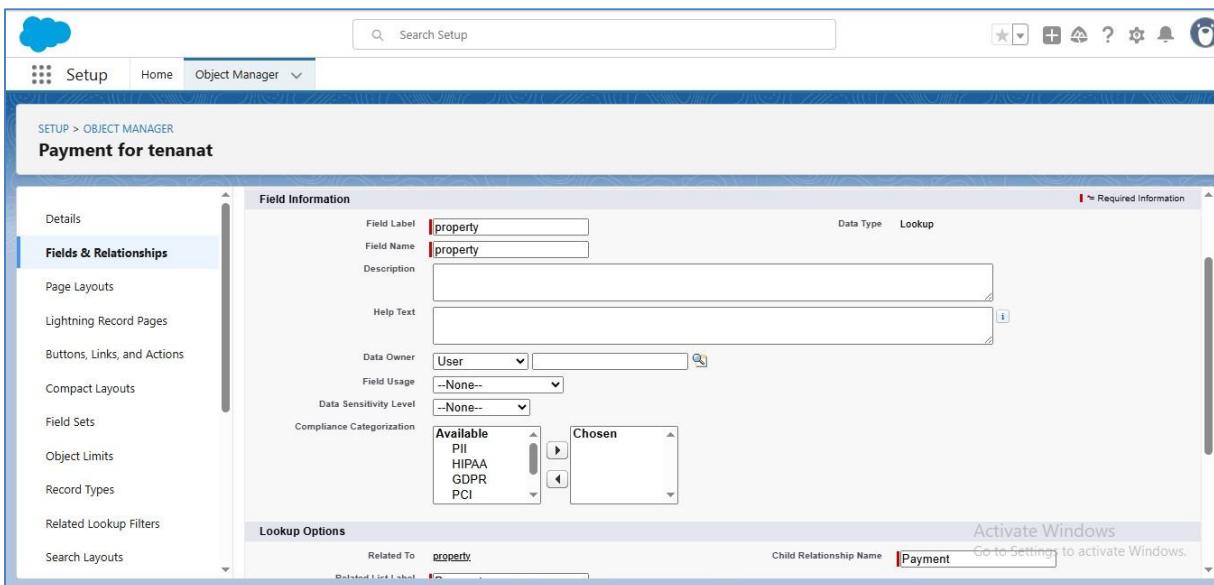
Click on Next>>Next>>Save and New

LEASE MANAGEMENT

Creation of Look up field on Payment for tenant object

From the set up

- 1.Click on Object Manager>>type object name(property)in search bar>>Click on the object
- 2.Click on Fields and Relationships>>New
- 3.Select Master detail relationship
- 4.Select the related object “property” and click on next
 - Field Name: property
 - Field label: auto generated



- 5.Click on Next>>Next>>Save and New

LEASE MANAGEMENT

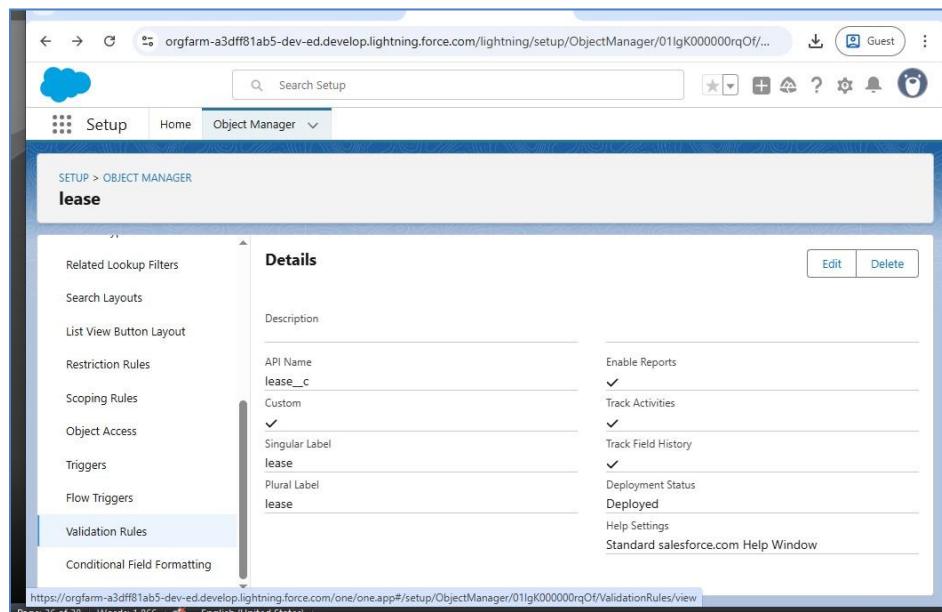
Milestone – 6

Validations Rules

Activity – 1 To create a validation rule to an Lease Object:

From the set up

- 1.Click on Object Manager>>From drop down menu click edit for lease object
- 2.Click on Validation rule>>Click on New

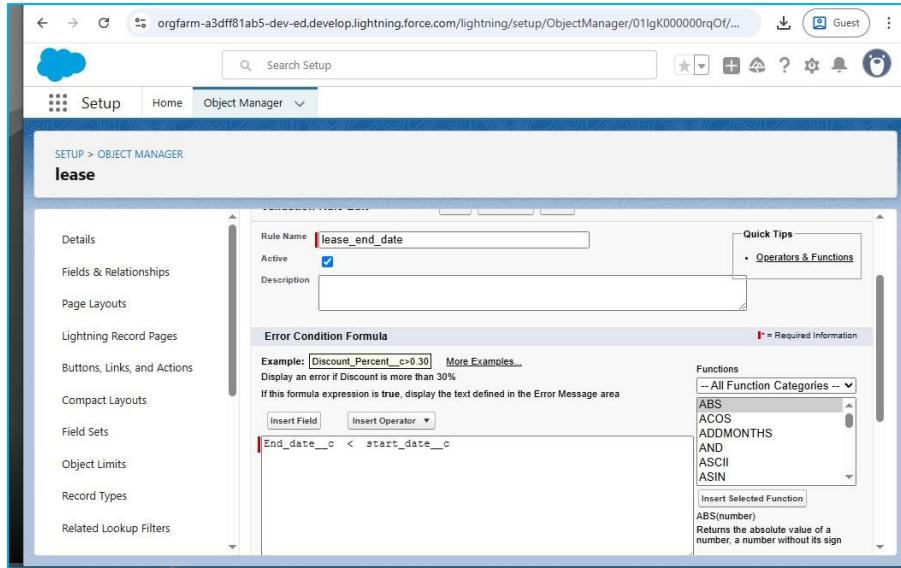


3.Enter the rule name as "lease_end_date"

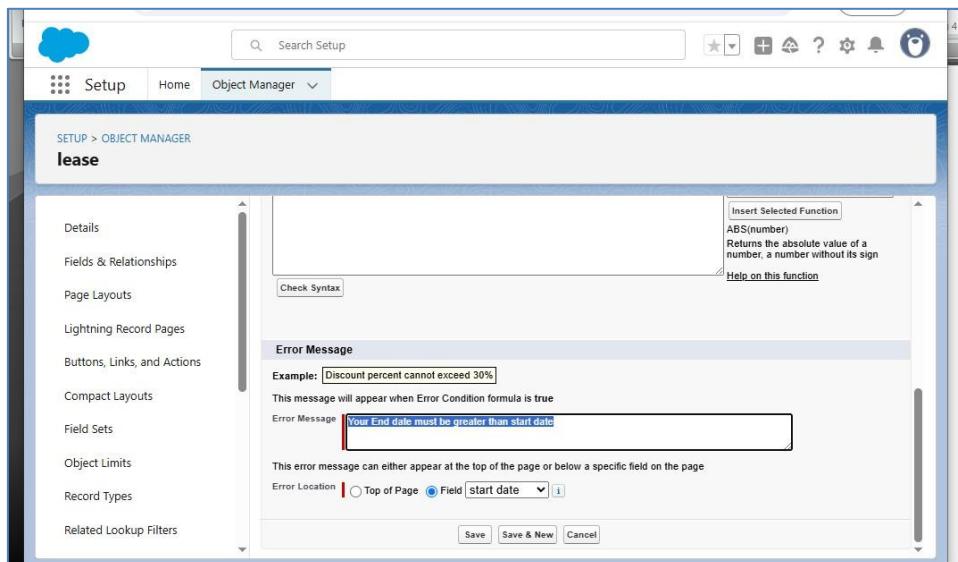
4.Insert the error condition formula as:

End_date_c < start_date_c

LEASE MANAGEMENT



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 MANAGEMENT

Milestone-7

Email Templates

Activity – 1 Create Email Template for Tenant Leaving:

To create Email Templates:

From the set up

1.In the quick find box >>Enter Email templates>>Click on classic email template

2.Click on >>New Email

- Template===>>Choose Text
- Folder: Unifiedpublic Classic Email templates
- Click on available for use

3.Email Template Name is "tenant leaving"

4.Template Unique name: auto populated

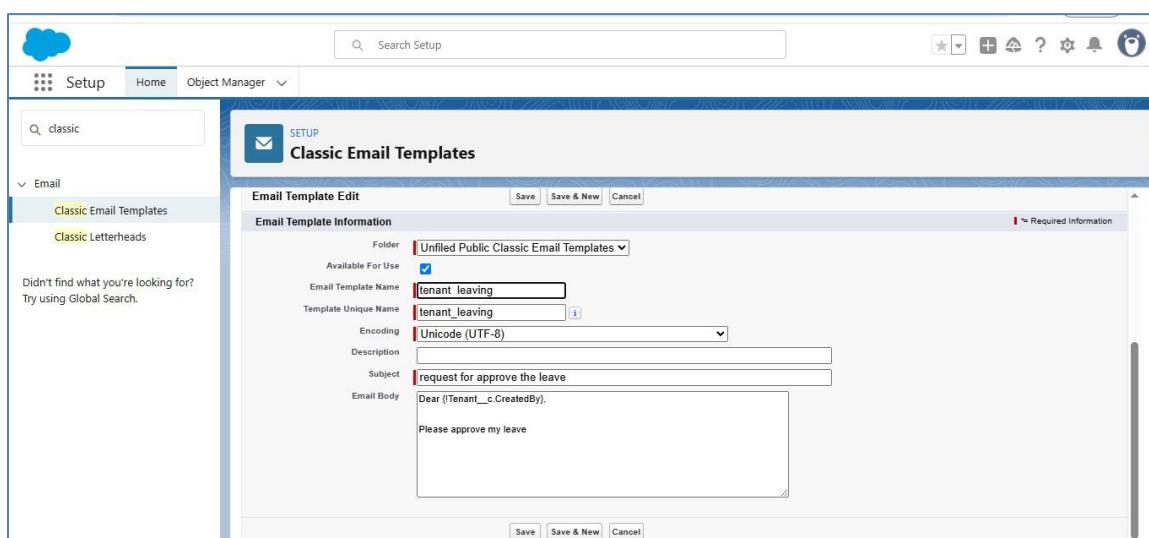
5. Subject: "request for approve the leave"

6.Email body:

Dear {! Tenant_c.CreatedBy},

Please approve my leave

7.Save



LEASE MANAGEMENT

Activity – 2 Create Email Template for Leave Approved

To create Email Templates:

From the set up

1. In the quick find box >>Enter Email templates>>Click on classic email template

2. Click on >>New Email

Template==>>Choose Text

Folder: Unifiedpublic 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:

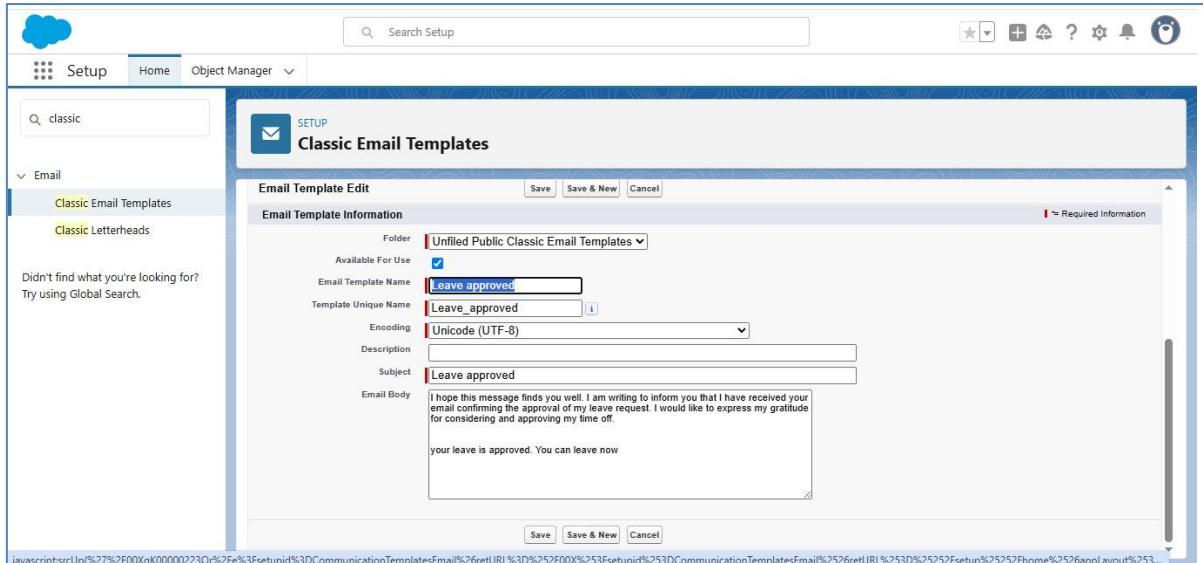
Dear {! Tenant__cName.},

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

LEASE MANAGEMENT



LEASE MANAGEMENT

Activity – 3 Create Email Template For rejection for leave

To create Email Templates:

From the set up

1. In the quick find box >>Enter Email templates>>Click on classic email template

2. Click on >>New Email

Template==>>Choose Text

Folder: Unifiedpublic 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},

hope this email finds you well. Your contract has not ended.

So, we can't approve your leave

your leave has rejected

7. Save

LEASE MANAGEMENT

The screenshot shows the Salesforce Setup interface with a search bar at the top. The left sidebar has a 'classic' search result highlighted under 'Email'. The main area is titled 'Classic Email Templates' and shows the 'Email Template Edit' screen for a template named 'Leave rejected'. The template details are as follows:

- Email Template Information**:
 - Folder: Unfiled Public Classic Email Templates
 - Available For Use: checked
 - Email Template Name: Leave rejected
 - Template Unique Name: Leave_rejected
 - Encoding: Unicode (UTF-8)
 - Description: Leave rejected
 - Subject: Leave rejected
- 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

At the bottom, there are 'Save', 'Save & New', and 'Cancel' buttons.

LEASE MANAGEMENT

Activity – 4 Create Email Template For Monthly payment

To create Email Templates:

From the set up

1.In the quick find box >>Enter Email templates>>Click on classic email template

2.Click on >>New Email

Template==>>Choose Text

Folder: Unifiedpublic 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 you to settle the payment at your earliest convenience.

7.Save

LEASE MANAGEMENT

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

- Setup** tab is selected.
- Classic Email Templates** is the current page.
- Email Template Edit** screen is displayed.
- Email Template Information** section:
 - Folder:** Unfiled Public Classic Email Templates
 - Available For Use:** Checked
 - Email Template Name:** Tenant Email
 - Template Unique Name:** Tenant_Email
 - Encoding:** Unicode (UTF-8)
 - Description:** Urgent: Monthly Rent Payment Reminder
 - Subject:** [REDACTED]
 - Email Body:** Contains a template message:

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
- Buttons:** Save, Save & New, Cancel.

LEASE MANAGEMENT

Activity – 5 Create Email Template For successful payment:

To create Email Templates:

From the set up

1.In the quick find box >>Enter Email templates>>Click on classic email template

2.Click on >>New Email

Template==>>Choose Text

Folder: Unifiedpublic 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.

7.Save

LEASE MANAGEMENT

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar and navigation links for 'Setup', 'Home', and 'Object Manager'. Under 'Email', it lists 'Classic Email Templates' and 'Classic Letterheads'. A message says 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'SETUP Classic Email Templates' and shows the 'Email Template Edit' screen for 'Email Template Information'. The template is named 'tenant_payment' and is set to 'Unfiled Public Classic Email Templates'. It includes fields for 'Template Unique Name' (tenant_payment), 'Encoding' (Unicode (UTF-8)), 'Subject' (Confirmation of Successful Monthly Payment), and '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.). Buttons at the bottom include 'Save', 'Save & New', and 'Cancel'.

LEASE MANAGEMENT

Milestone – 8

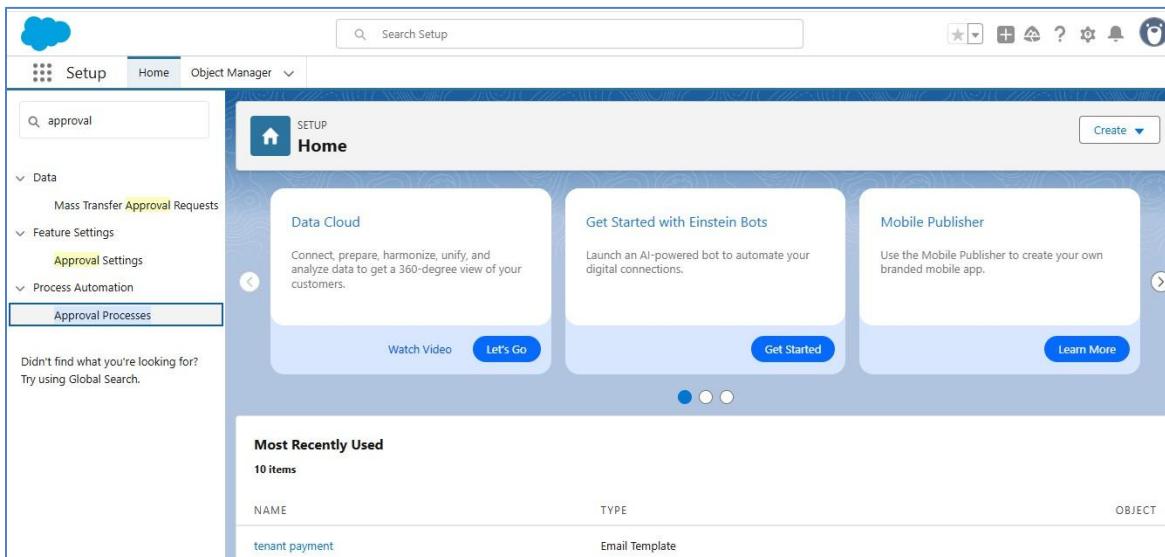
Approval Process

Activity – 1 Create Approval Process for check for vacant:

To create fields in an object

From the set up

1. In the quick find box >>Search for Approval process>>Click on it



2. Manage approval process for "Tenant" from the drop down
3. Click on "create new approval process">>use standard set up wizard
4. Process name "check for vacant">>Click on next
5. Field >>tenant: status>>Operator: Not equals>>value>>Click on the look up filter icon and select "Leaving"
6. Click on insert field, click on next

LEASE MANAGEMENT

Step 2. Specify Entry Criteria

Use this approval process if the following criteria are met:

Field	Operator	Value
Tenant__status	not equal to	Leaving
None	None	

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

Step 3. Specify Approver Field and Record Editability Properties

Select Field Used for Automated Approval Routing

Next Automated Approver Determined By: None

Record Editability Properties

Administrators ONLY can edit records during the approval process.
 Administrators OR the currently assigned approver 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.

LEASE MANAGEMENT

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

12. Then click save.

The screenshot shows a modal dialog box titled "Approval Processes" with a "SETUP" button in the top left corner. The main content area is titled "What Would You Like To Do Now?". It contains a message: "You have just created an approval process. However, you cannot activate this process until you define at least one approval step. Would you like to do that now?". Below the message are three radio buttons:

- Yes, I'd like to create an approval step now.
- I'll do this later. Take me to the approval detail page to review what I've just created.
- I'll do this later. Take me back to the listing of all approval processes for this object.

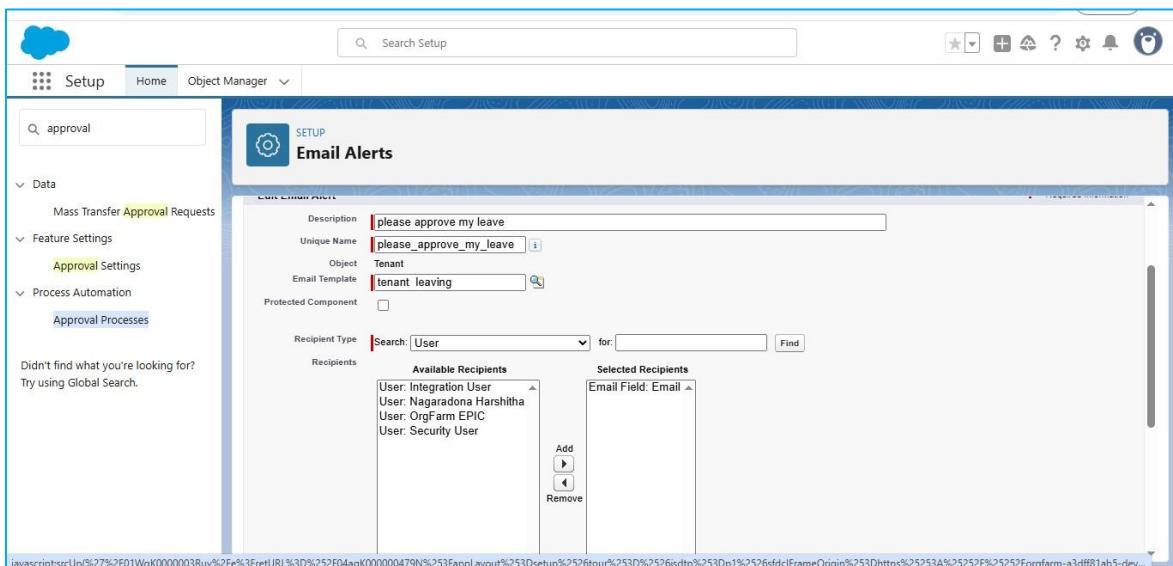
A "Go!" button is located at the bottom right of the modal.

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

LEASE MANAGEMENT

Activity – 2 Initial Submission Action:

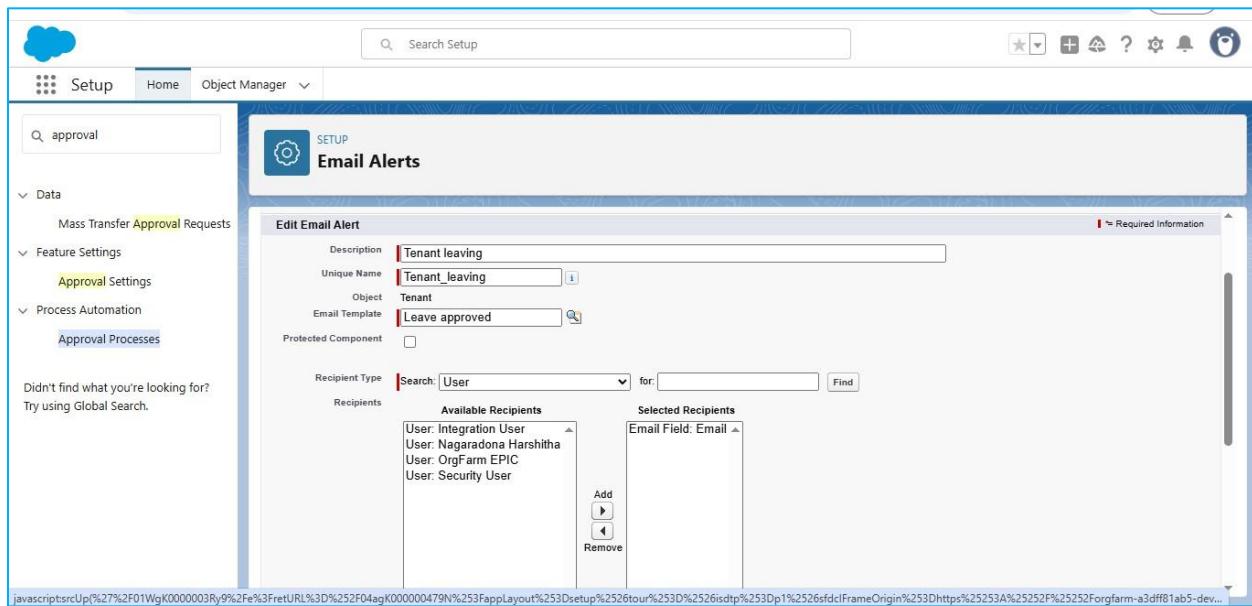
- 1.Under initial submission action click on add new and then select email alert.
- 2.Description: "please approve my leave"
- 3.unique name: auto populated
- 4.Email template: tenant leaving
5. Recipient type: Email field
6. Available Recipients:Email field: Email
7. From Email address: Current user's email
8. Click save.



LEASE MANAGEMENT

Activity – 3 Final Approval Action:

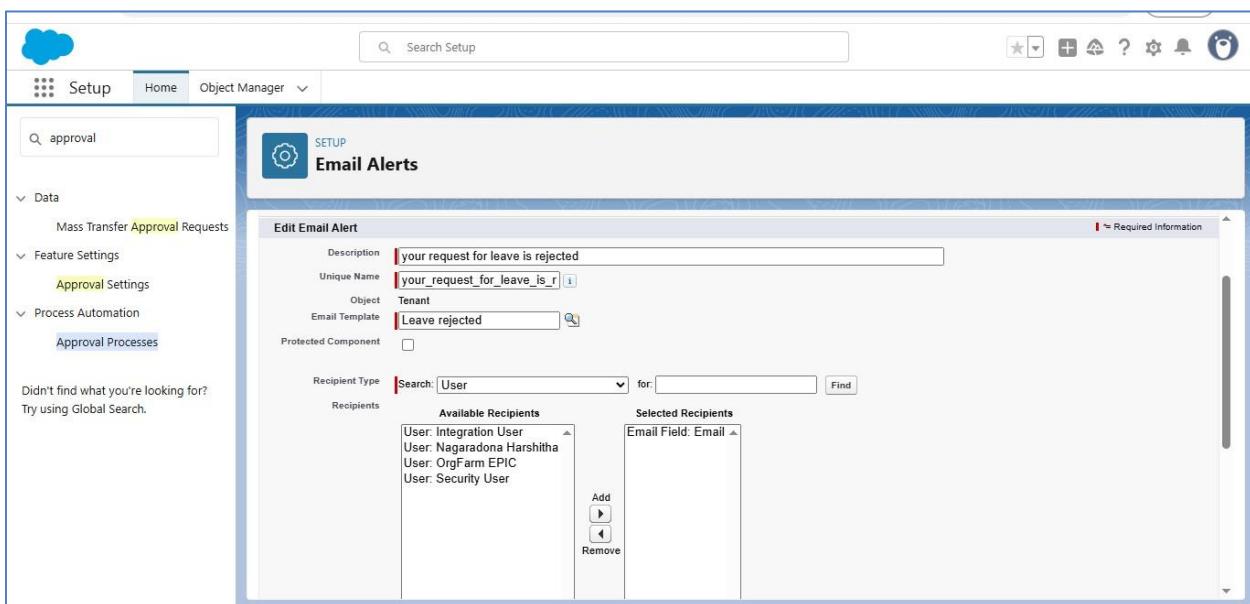
- 1.Under Final approval action click on new and then select email alert.
- 2.Description: "Tenant leaving".
- 3.unique name: auto populated
- 4.Email template: Leave approved
5. Recipient type: Email field
6. Available Recipients: Email field: Email
- 7.From Email address: Current user's email
8. Click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



LEASE MANAGEMENT

Activity – 4 Final Rejection Action:

- 1.Under Final rejection action click on 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
8. Click save.



LEASE MANAGEMENT

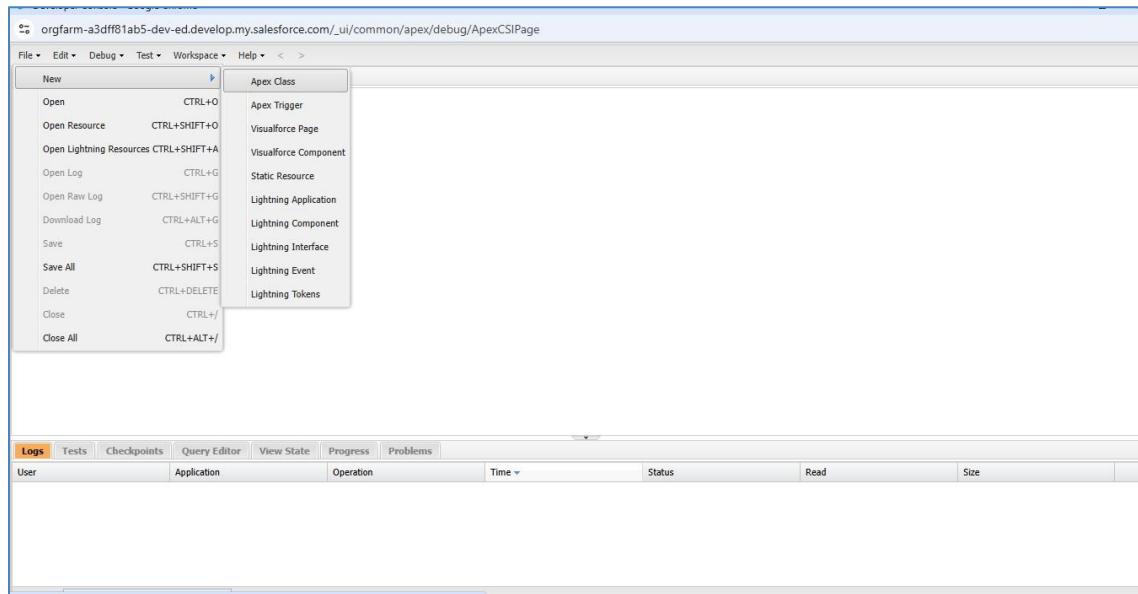
Milestone – 9

Apex Trigger

Activity – 1 Create an Apex Trigger:

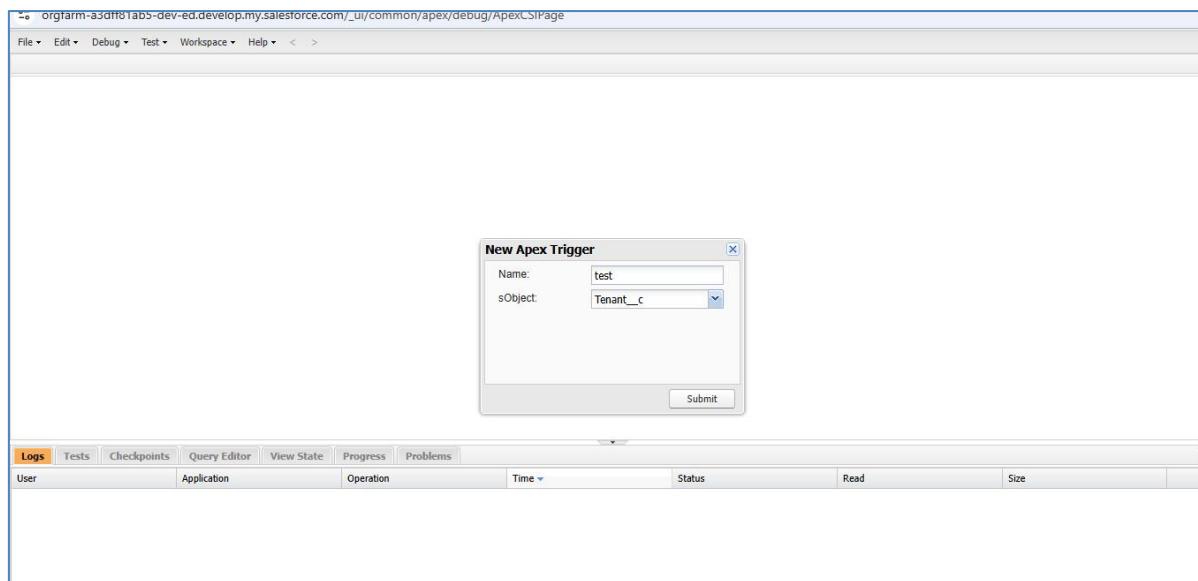
To create a new Apex Trigger, follow the below steps

1. Click on file>>New>> Apex Trigger



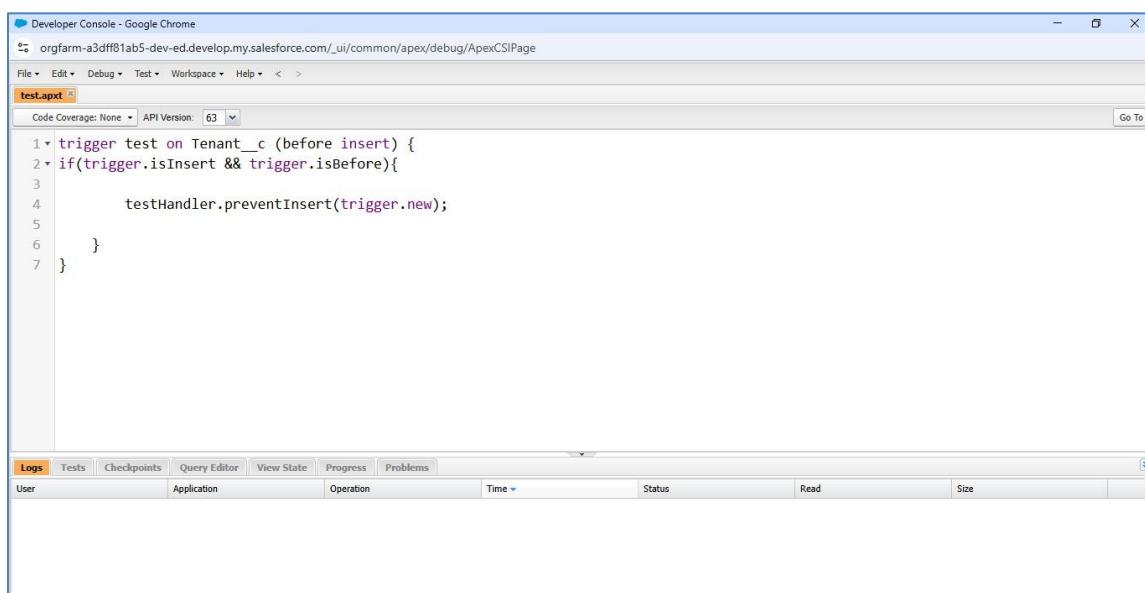
2. Give the Apex trigger name as Test>>select Tenent_c from the drop down sObject

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3. Click on submit

4. Now write the code logic here



Trigger Code:

trigger test on Tenant__c (before insert)

{

if (trigger. is Insert&&

trigger.isBefore){ testHandler.preventInsert(trigger.

new);

LEASE MANAGEMENT

```
}
```

```
}
```

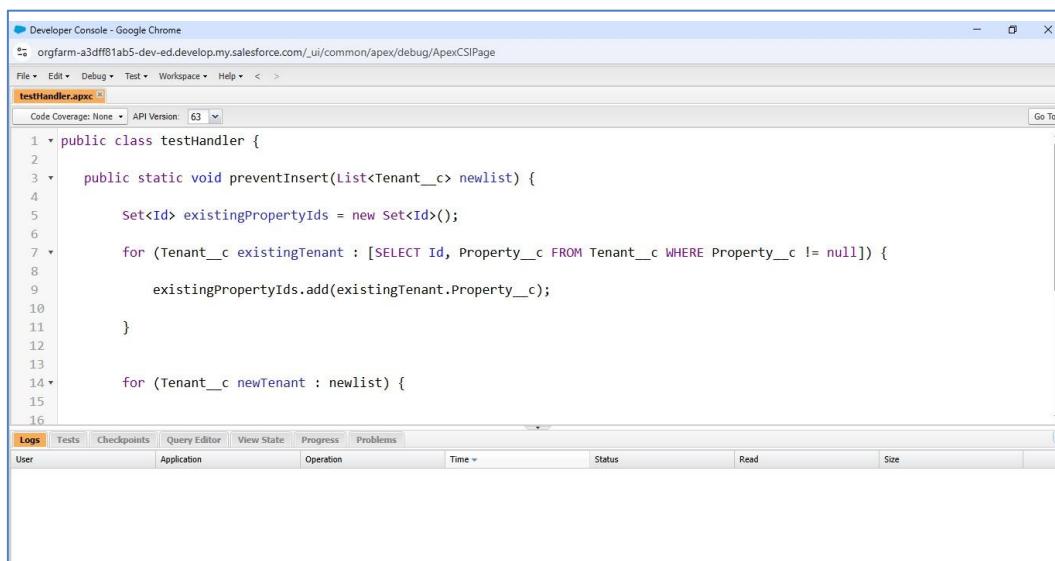
5. Click on Save

Create an Apex Handler class:

To create a new Apex class follow the below steps

1. Click on file > New > Apex class

2. Enter the trigger name as testHandler



```
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) {
                newList.remove(newTenant);
            }
        }
    }
}
```

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) {
                newList.remove(newTenant);
            }
        }
    }
}
```

LEASE MANAGEMENT

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

3. Click on Save

Activity – 3 Testing the Trigger:

Go to AppLauncher search for Lease Management>>Select Tenant>>

Try to create new tenant with the existing property

1. Go to AppLauncher search for Lease Management>>Select Tenant>>Click on New
2. Enter the details of User

The screenshot shows the 'Edit' screen for a tenant named 'Harathi'. The title bar says 'Edit Harathi'. A note at the top right indicates that fields marked with an asterisk (*) are required information. The form fields include:

- * Tenant Name: Harathi
- * Email: akkalaharathi@gmail.com
- Phone: (empty field)
- status: Stay
- property: House-1 (with a delete icon)
- Created By: Harathiakkala, 6/3/2025, 11:55 PM
- Last Modified By: Harathiakkala, 6/5/2025, 11:23 PM

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

LEASE MANAGEMENT

3. Select property as House-2

4. Click on Save

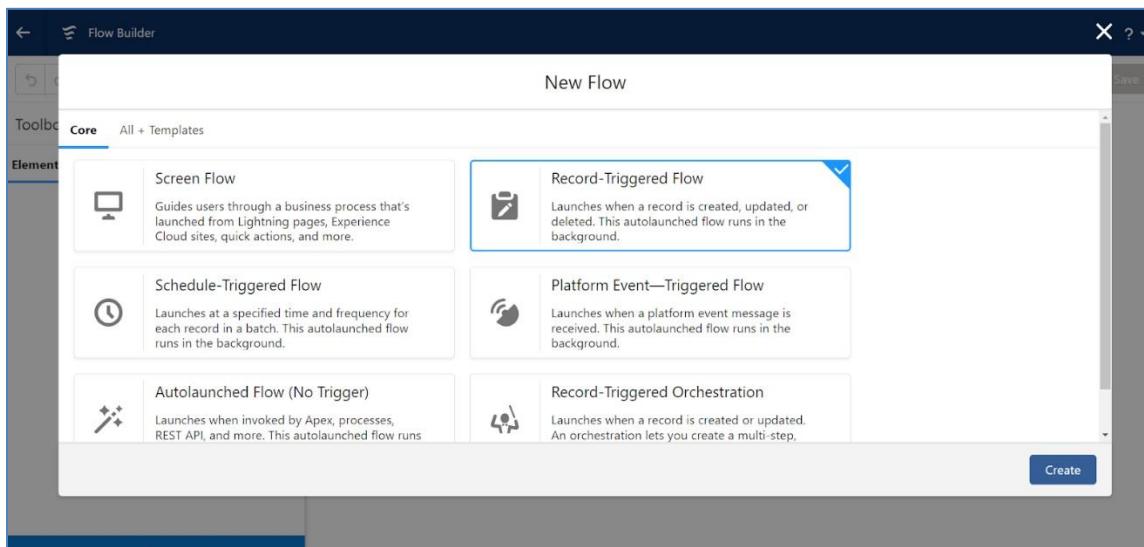
LEASE MANAGEMENT

Milestone – 10

Flows

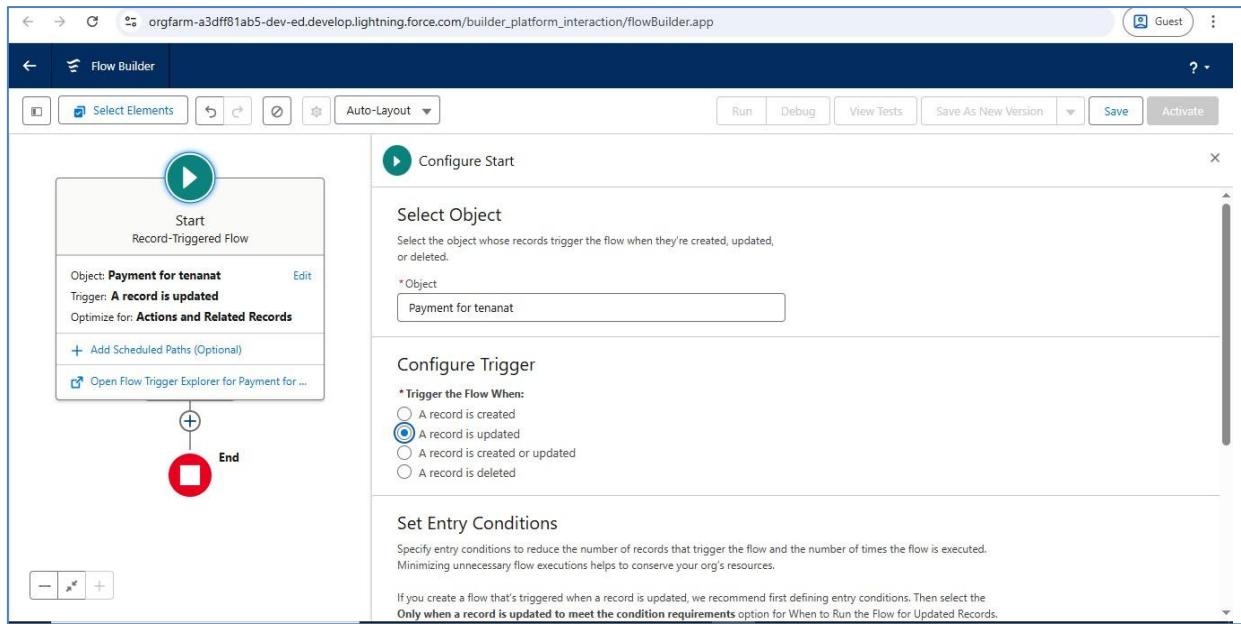
Activity – 1 Create Flow for monthly payment

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.



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

LEASE MANAGEMENT



Set Entry Conditions

Under Condition Requirements

All Conditions are met

Field: check_for_payment_c operator: Equalsvalue: Paid

5. Click on: Every time a record is updated and meets the condition requirements
6. Click on: Actions and related records, done

LEASE MANAGEMENT

Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements

All Conditions Are Met (AND)

Field

check_for_payment_c

Operator

Equals

Value

paid



+ Add Condition

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 the Flow for:

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.

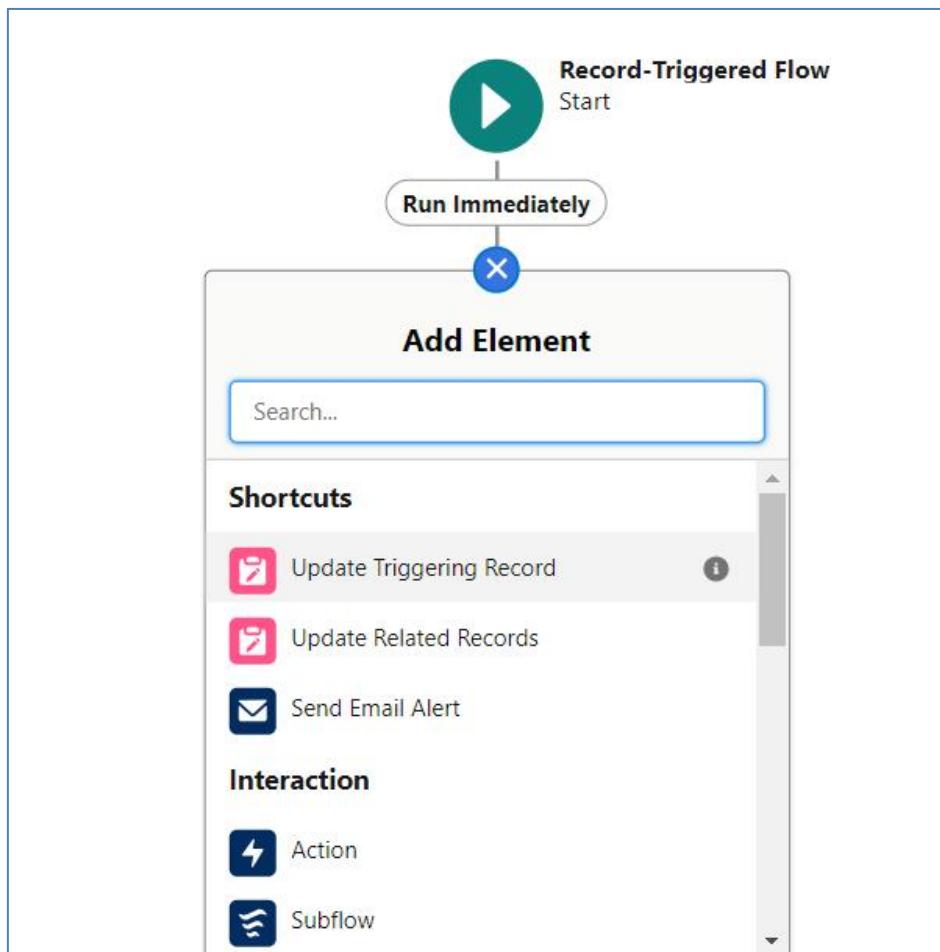
Actions and Related Records

Update any record and perform actions, like send an email. This more flexible flow runs *after* the record is saved to the database.

7.

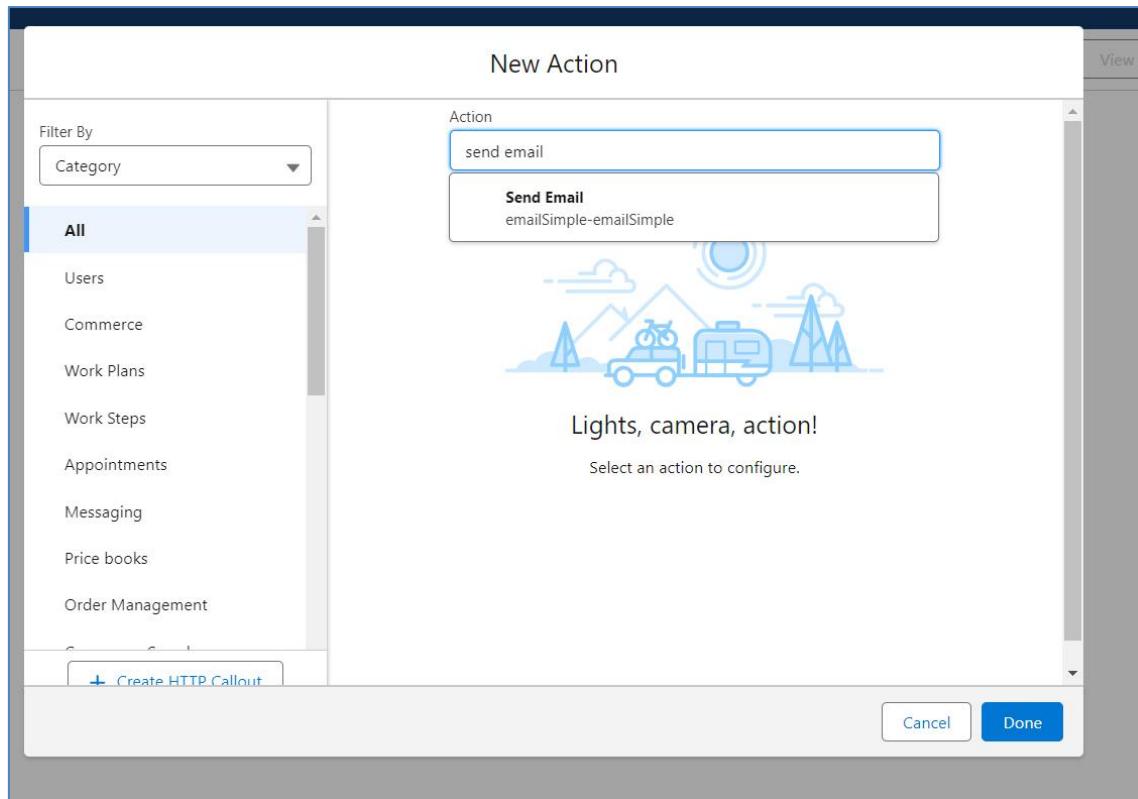
Under record trigger flow click on "+" icon and select action

LEASE MANAGEMENT



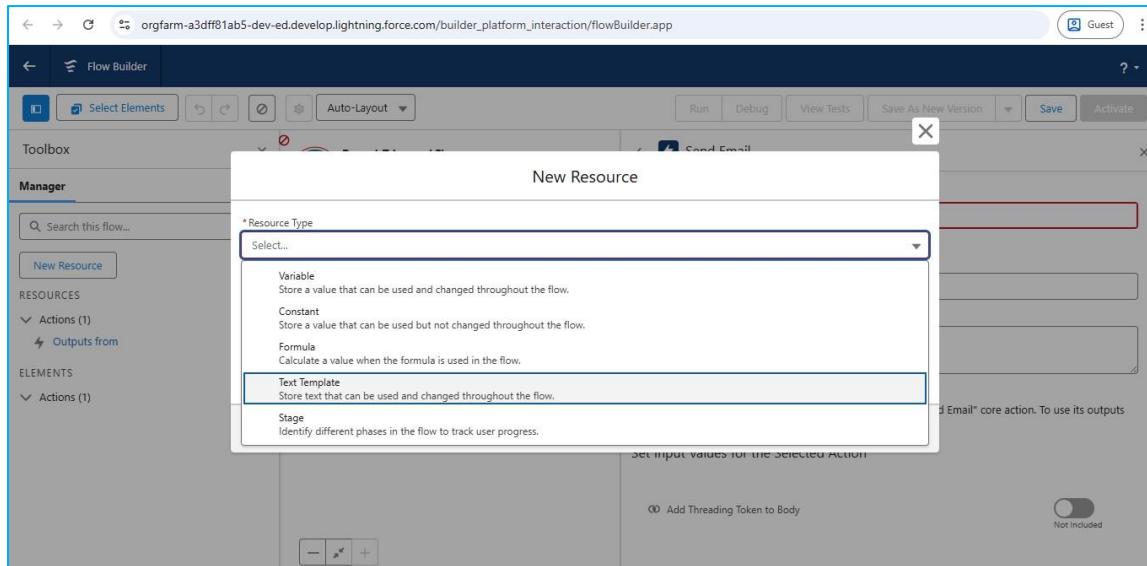
7. In action search for send email then click on send email (check below image)
8. Label: send email
9. API Name:send email

LEASE MANAGEMENT



10. Enable Body

11. Click on new resource



LEASE MANAGEMENT

Under resource type select "Text Template"

API Name :emailbody

Under body:(paste the below text)

Dear {! \$Record.Tenant__r. 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.

12. Click Done.

13. Enable recipient Address List

Paste this? {! \$Record.Tenant__r. Email__c}

14. Click Done

15. Enable subject

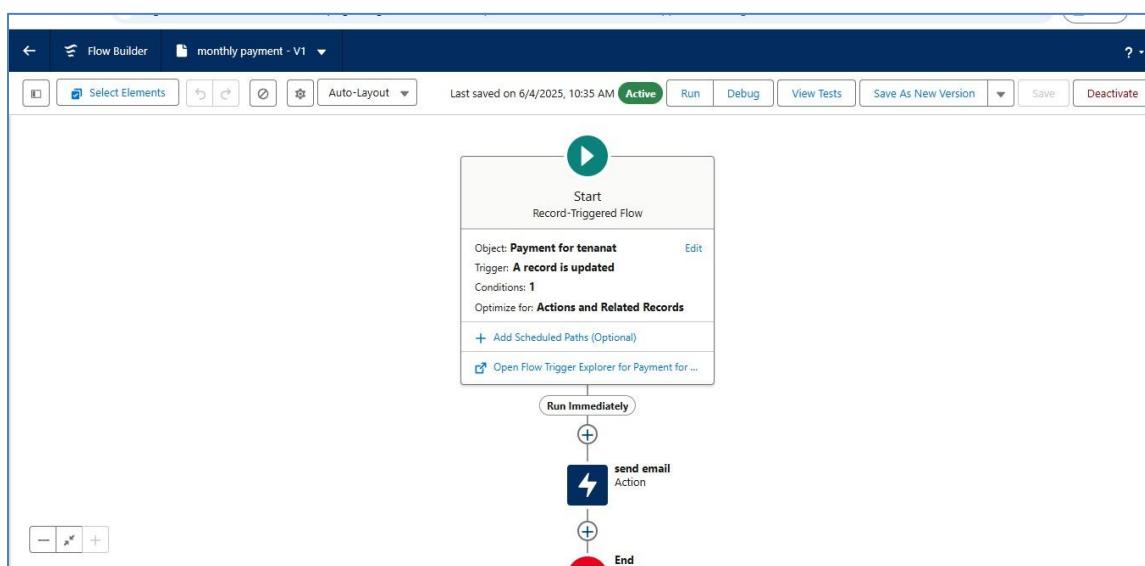
Paste this >> Confirmation of Successful Monthly Payment

16. Click on save

Flow label: monthly payment

Flow API Name:monthly payment

Click on activate



LEASE MANAGEMENT

Milestone – 11

Schedule class

Create an Apex Class

To create a new Apex Class, follow the below steps:

1. Click on the file >> New >> Apex Class.
2. Enter class name as MonthlyEmailScheduler.



The screenshot shows the code editor for the MonthlyEmailScheduler.apex class. The code implements the Schedulable interface and contains logic to send monthly emails to tenants if the current day is 1. The code uses the Messaging API to create and send email messages.

```
MonthlyEmailScheduler.apex
Code Coverage: None • API Version: 59
1 • global class MonthlyEmailScheduler implements Schedulable {
2 •     global void execute(SchedulableContext sc) {
3         Integer currentDay = Date.today().day();
4         if (currentDay == 1) {
5             sendMonthlyEmails();
6         }
7     }
8
9     public static void sendMonthlyEmails() {
10        List<Tenant__c> tenants = [SELECT Id, Email__c FROM Tenant__c];
11
12        for (Tenant__c tenant : tenants) {
13            String recipientEmail = tenant.Email__c;
14            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 arrangements.';
15            String emailSubject = 'Reminder: Monthly Rent Payment Due';
16
17            Messaging.SingleEmailMessage email = new Messaging.SingleEmailMessage();
18            email.setToAddresses(new String[]{recipientEmail});
19            email.setSubject(emailSubject);
20            email.setPlainTextBody(emailContent);
21
22            Messaging.sendEmail(new Messaging.SingleEmailMessage[]{email});
23        }
24    }
25 }
26
27 }
```

Apex logic:

global class MonthlyEmailScheduler implements Schedulable

```
{ global void execute(SchedulableContextsc) {  
    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;
```

LEASE MANAGEMENT

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});
}
```

}

}

3. Save the code

LEASE MANAGEMENT

Activity – 2 Schedule Apex class:

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

The screenshot shows the Salesforce Setup Apex Classes page. The search bar at the top left contains 'apex'. On the left sidebar, under 'Custom Code', 'Apex Classes' is selected. The main content area displays the 'Apex Classes' section with a table. The table has columns: Action, Name, Namespace Prefix, Api Version, Status, Size Without Comments, Last Modified By, and Has Trace Flags. Two rows are present:

Action	Name	Namespace Prefix	Api Version	Status	Size Without Comments	Last Modified By	Has Trace Flags
Edit Del Security	MonthlyEmailScheduler		63.0	Active	1,126	Nagaradona Harshitha	6/3/2025, 10:17 PM
Edit Del Security	testHandler		63.0	Active	584	Nagaradona Harshitha	6/2/2025, 11:39 PM

Below the table, there is a section titled 'Dynamic Apex Classes' with the sub-instruction: 'Dynamic Apex extends your programming reach by interacting with Lightning Platform components.' A table below this section shows columns: Class Name, Namespace Prefix, Api Version, Created By, and Last Modified By. The message 'No records to display.' is shown.

3. Enter job Name: MonthlyEmailScheduler
4. Apex class: MonthlyEmailScheduler
5. Frequency: Monthly ==> select on day 1
6. Start date: 04/12/2023
7. End date: 04/01/2024
8. Preferred start time: 09:00 am
9. save

LEASE MANAGEMENT

Schedule Apex

Schedule an Apex class that implements the 'Schedulable' interface to be automatically executed on a weekly or monthly interval.

The screenshot shows the 'Schedule Apex' configuration page. At the top, there are 'Save' and 'Cancel' buttons. Below them, the 'Job Name' is set to 'MonthlyEmailScheduler'. The 'Apex Class' dropdown also contains 'MonthlyEmailScheduler'. Under 'Schedule Apex Execution', the 'Frequency' is set to 'Monthly' (selected over 'Weekly'). The schedule is defined as 'On day 1 of every month'. The 'Start' date is '04/12/2023' and the 'End' date is '04/01/2024'. The 'Preferred Start Time' is '9:00 am'. A note at the bottom states: 'Exact start time will depend on job queue activity.' At the very bottom are 'Save' and 'Cancel' buttons.

LEASE MANAGEMENT

From the set up

1.Go to ObjectManager>>Select tenant>>Click on page layouts

2.Go to the buttons tab

3.Drag submit for approval towards the tenant detail

The screenshot shows the Salesforce Setup interface for managing object layouts. The top navigation bar includes 'Guest', 'Setup', 'Home', and 'Object Manager'. The left sidebar under 'SETUP > OBJECT MANAGER' lists various options like 'Details', 'Fields & Relationships', and 'Page Layouts'. The 'Page Layouts' option is currently selected. The main content area displays the 'Tenant' object's page layout configuration. In the center, there's a 'Buttons' section with a 'Quick Find' search bar and a grid of buttons including 'Change Owner', 'Edit', 'Sharing', 'Change Record Type', 'Edit Labels', 'Sharing Hierarchy', 'Clone', 'Printable View', 'Submit for Approval', 'Delete', and 'Send Survey'. Below this is a note about overriding predefined actions. At the bottom, there's a 'Tenant Detail' section with 'Standard Buttons' (Edit, Delete, Clone, Change Owner, Change Record Type, Printable View, Sharing, Sharing Hierarchy, Submit for Approval, Edit Labels) and a 'Custom Buttons' section. The 'Submit for Approval' button is highlighted with a yellow border, indicating it is being moved. The bottom of the screen shows a table with tenant information: Tenant Name (Sample Text), Email (sarah.sample@company.com), Phone (1-415-555-1212), and Status (Sample Text). The owner is listed as Sample Text.

LEASE MANAGEMENT

1. Go to AppLauncher > Search Lease Management > Select Tenant

2. Click on the user created

The screenshot shows the Salesforce Lease Management interface. At the top, there is a navigation bar with icons for Home, App Launcher, and Help. Below the navigation bar, a search bar contains the placeholder "Search...". To the right of the search bar are several small icons: star, plus, document, question mark, gear, bell, and a refresh symbol.

The main area displays a record for a tenant named "Harathi". The record has a pink icon representing a contact. The "Details" tab is selected. The "Related" tab is visible but not selected. The "Details" section contains the following fields:

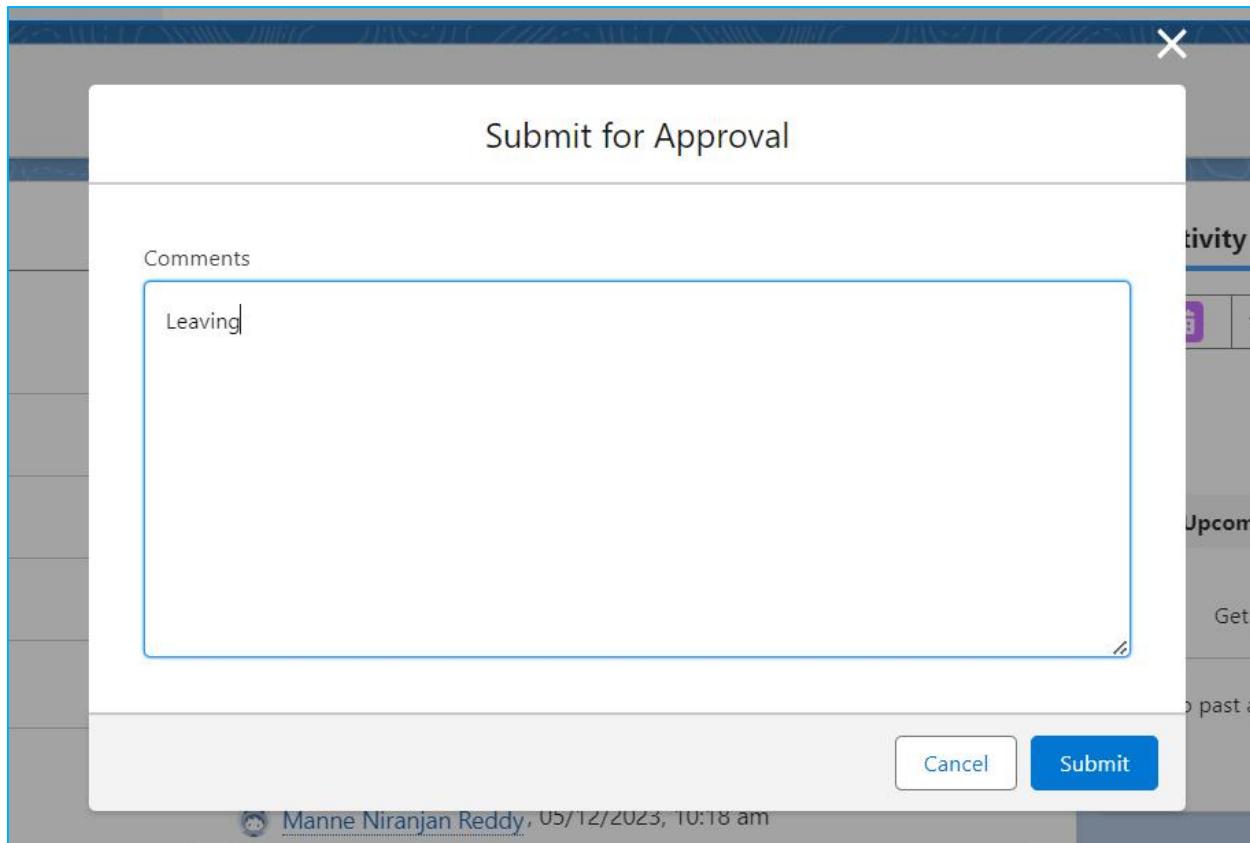
- Tenant Name: Harathi
- Email: akkalaharathi@gmail.com
- Phone: (empty)
- Status: Stay
- Property: house-2

To the right of the details, the "Owner" field is listed as "Harathi akkala" with a small edit icon next to it. Below the details, a note says "Last Modified By" followed by the same "Harathi akkala" information and the date "6/3/2025, 11:57 PM".

On the far right, a sidebar titled "Activity" is open. It includes a toolbar with icons for New Contact, Edit, New Opportunity, and a dropdown menu. The dropdown menu is expanded, showing options like "New Case", "New Lead", "Delete", "Clone", "Change Owner", "Printable View", and "Submit for Approval". The "Submit for Approval" option is highlighted with a blue border. Below the toolbar, there are filters set to "All time" and "All activity types", a "Refresh" button, and a link to "Upcoming & Overdue". A message states "No activities to show. Get started by sending an email, scheduling a task, and more." Another message below says "No past activity. Past meetings and tasks marked as done show up here."

3. Enter any comment and click on submit

LEASE MANAGEMENT



A screenshot of the Lease Management application. The main screen shows a 'Tenant Approval' request for 'Madhu'. The details are: Submitter - Nagaradona Harshitha, Date Submitted - Jun 6, 2025, Actual Approver - Nagaradona Harshitha, Assigned To - Nagaradona Harshitha. In the 'Details' section, the 'Approval Details' field shows 'Tenant Name: Madhu'. On the right side, there is a 'Notifications' sidebar with several entries:

- Nagaradona Harshitha is requesting approval for tenant Tenant Name: Madhu (a few seconds ago)
- Approval request for the tenant is rejected Madhu (Jun 5, 2025, 10:46 AM)
- New Guidance Center learning resource available Set Up Accounts & Contacts Start storing information about your customers with accounts and contacts. (Jun 3, 2025, 9:30 AM)
- New Guidance Center learning resource available Define Your Sales Process Learn how to guide reps through the sales process. (Jun 3, 2025, 9:30 AM)

LEASE MANAGEMENT

Click on that notification

click on approve

Give any comment and submit

The screenshot shows a Salesforce Lightning page for a process instance step. The top navigation bar includes 'Lease Management', 'Payment', 'property', 'lease', 'Tenants', and 'Madhu Approval'. A search bar and a notifications icon are also present. The main content area displays a 'Process Instance Step' titled 'Tenant Approval' with a status of 'Approved'. Below this, details are shown for the submitter (Nagaradona Harshitha), date submitted (Jun 6, 2025), actual approver (Nagaradona Harshitha), and assigned to (Nagaradona Harshitha). A 'Details' section contains an 'Approval Details' table with a single row for 'Tenant Name' (Madhu). To the right, a sidebar titled 'Notifications' lists several items:

- Approval request for the tenant is approved** by Madhu, a few seconds ago.
- Approval request for the tenant is rejected** by Madhu, Jun 5, 2025, 10:46 AM.
- New Guidance Center learning resource available**: Set Up Accounts & Contacts, Start storing information about your customers with accounts and contacts, Jun 3, 2025, 9:30 AM.
- New Guidance Center learning resource available**: Define Your Sales Process, Learn how to guide reps through the sales process, Jun 3, 2025, 9:30 AM.

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

Testing the Reject process

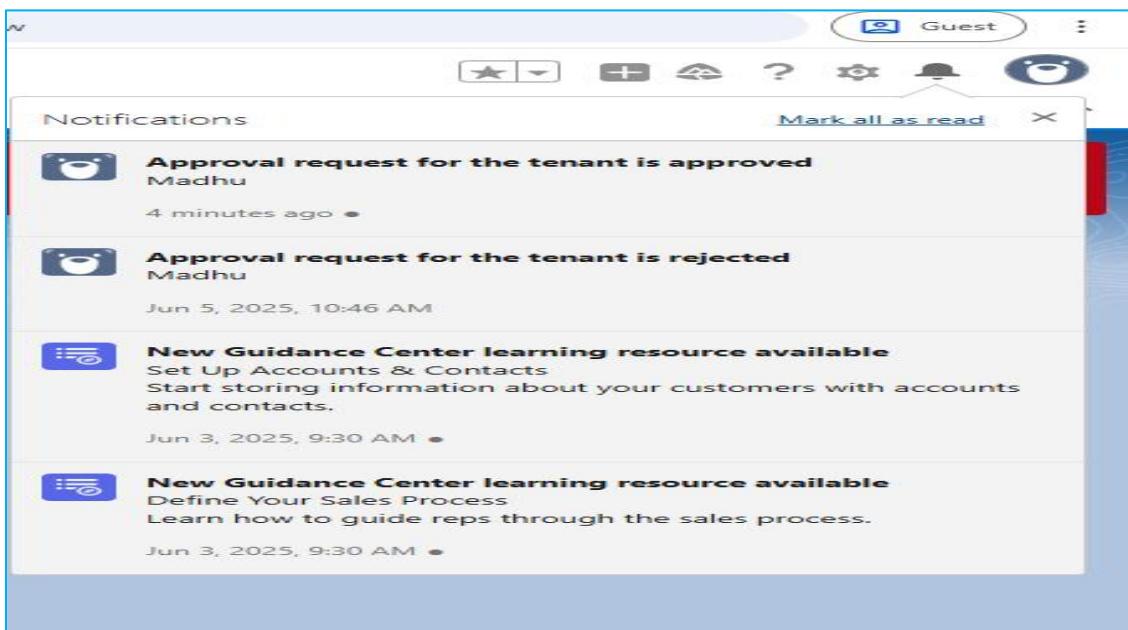
LEASE MANAGEMENT

Enter any comment and click on submit

Click on that notification

Click on reject

Give any comment and submit



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

LEASE MANAGEMENT

Outputs:

Payment tab:

The screenshot shows the 'Payment' tab within the 'Lease Management' application. At the top, there's a navigation bar with 'Lease Management' and other tabs like 'Payment', 'property', 'lease', and 'Tenants'. Below the navigation is a search bar and a toolbar with icons for 'New', 'Import', 'Change Owner', and 'Assign Label'. The main area displays a list titled 'Recently Viewed' with one item: 'new'. The list includes a column for 'Payment Name'. The overall interface is clean with a blue and white color scheme.

Payment tab details:

This screenshot shows the 'Information' sub-tab for a new payment record. The form fields are as follows: 'Payment Name' is set to 'New'; 'Payment date' is '6/11/2025'; 'Amount' is '450'; 'check for payment' is 'Paid'; 'Email' is 'harshithan0048@gmail.com'; and 'property' is 'House -1'. The 'Save' button at the bottom right is highlighted in blue. The background shows the 'Recently Viewed' list from the previous screenshot.

LEASE MANAGEMENT

Property tab:

Lease Management Payment property lease Tenants

Recently Viewed

2 items • Updated a few seconds ago

property Name

1 House - 2

2 House - 1

New Import Change Owner Assign Label

Search this list...

New Property tab details:

Lease Management

Recently Viewed

2 items • Updated a few seconds ago

property Name

1 House - 2

2 House - 1

Information

*property Name: House

Address: Tirupati

Type: 2BHK

sfqt: 1200

*Name: House

Owner: Nagaradona Harshitha

* = Required Information

Change Owner Assign Label

House-1 House-2

Cancel Save & New Save

LEASE MANAGEMENT

Lease tab:

The screenshot shows the 'Lease Management' software interface. At the top, there are navigation tabs: 'Lease Management', 'Payment', 'property', 'lease' (which is currently selected), and 'Tenants'. A search bar and various icons are also at the top. Below the tabs, a section titled 'Recently Viewed' shows a bell icon and a dropdown menu. It displays the message '0 items • Updated a few seconds ago'. On the right, there's a toolbar with buttons for 'New', 'Import', 'Change Owner', and 'Assign Label'. A large central area has a placeholder image of a landscape with a cactus and a sun, and the text 'You haven't viewed any lease recently. Try switching list views.'

New lease tab details:

The screenshot shows the 'New lease' form. The title bar says 'New lease' and includes a close button ('X'). Below the title, it says '* = Required Information'. The form has a section titled 'Information' with the following fields:

- * lease Name: Land
- start date: 6/23/2024
- End date: 6/11/2025
- property: House - 2

On the right side of the form, there is an 'Owner' section showing a profile picture and the name 'Nagaradona Harshitha'. At the bottom of the form are three buttons: 'Cancel', 'Save & New', and 'Save'.

LEASE MANAGEMENT

Tenant tab:

Lease Management

Search...

New Import Change Owner Assign Label

Recently Viewed

2 items • Updated a few seconds ago

Tenant Name ↑

1 Madhu

2 Madhu

Search this list... Filter

New tenant tab details:

Lease Management

Recently Viewed

2 items • Updated 4 minutes ago

Tenant Name

1 Madhu

2 Madhu

NEW TENANT

* = Required Information

Information

*Tenant Name: Madhu

*Email: madhu@gmail.com

Phone: 8328494214

status: Stay

property: House - 2

Owner: Nagaradona Harshittha

Change Owner Assign Label

Cancel Save & New Save

LEASE MANAGEMENT

LEASE MANAGEMENT