

# PROJECT DESIGN PHASE

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| Project Name | LEASE MANAGEMENT   |
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## 1. Overview

The proposed **Salesforce Lease Management System** aims to automate the complete property lease cycle — from property setup and tenant registration to rent tracking and approval management — using Salesforce's low-code tools and automation features.

## 2. Core Functional Modules

### Property Management

- Manage property details such as location, rent, and availability.
- Each property is uniquely identified and linked to a tenant via lookup relationships.

### Tenant Management

- Store tenant information with contact and status details.
- Ensures only one tenant can occupy a property through Apex Trigger validation.

### Payment Tracking

- Automatically sends confirmation emails to tenants upon successful payment.
- Payment status updates trigger record-triggered flows for email automation.

### Lease Management

- Captures lease start and end dates.
- Validation rules prevent incorrect data (e.g., end date before start date).

### Approval Process

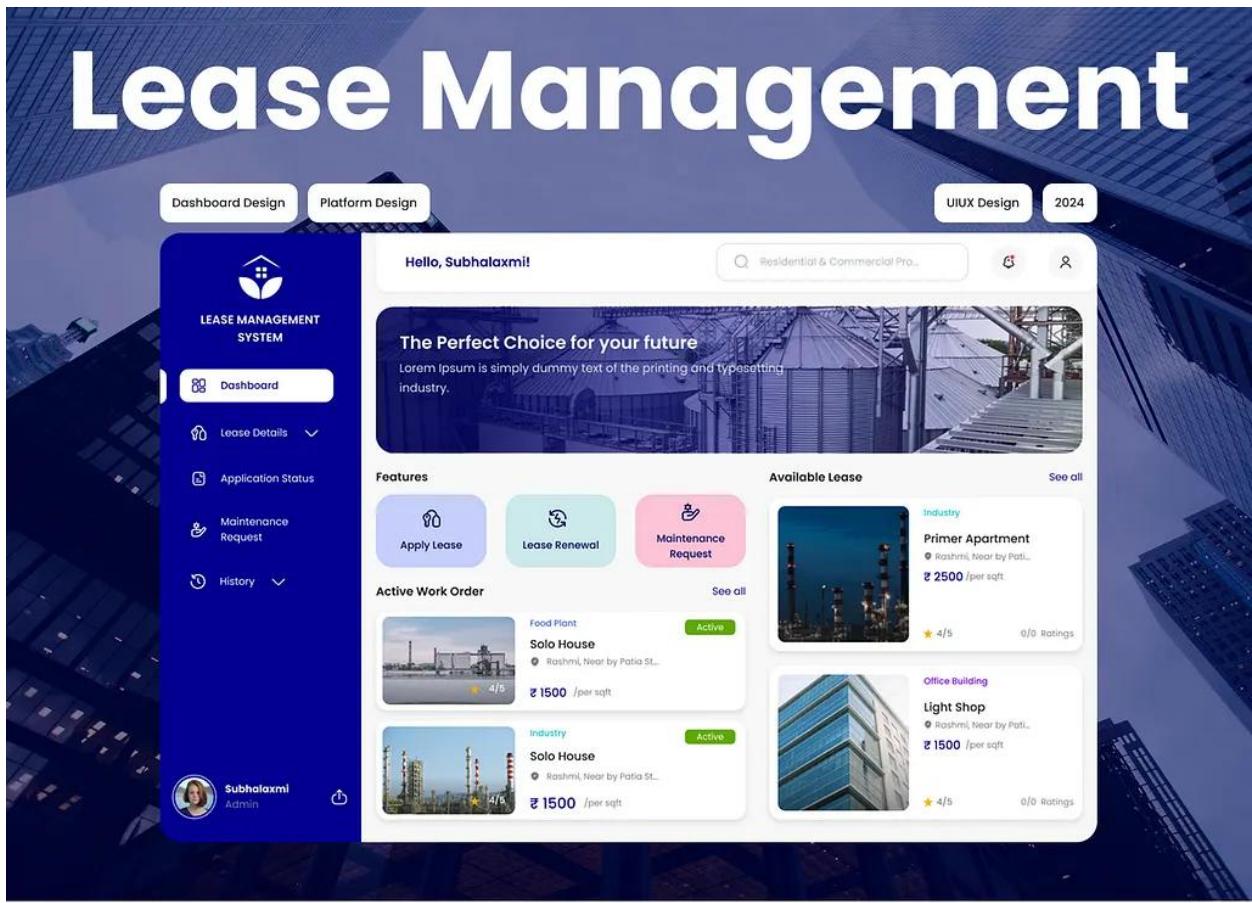
- Tenants can submit leave requests for admin approval.
- The approver receives a notification and can approve or reject, triggering automated email alerts.

### Email Automation

- Predefined Classic Email Templates for rent reminders, approvals, and payments.
- Ensures communication consistency and professionalism.

## Apex Scheduler

- Executes monthly rent reminder emails on the 1st of each month automatically.
- Uses Salesforce's Schedulable interface for time-based automation.



## 3. Key Features

| Feature                      | Description                                     |
|------------------------------|---|
| <b>Record Triggered Flow</b> | Automates payment confirmation emails           |
| <b>Approval Workflow</b>     | Manages tenant leave requests                   |
| <b>Apex Trigger</b>          | Prevents multiple tenants for the same property |
| <b>Scheduled Apex</b>        | Sends monthly rent reminders                    |
| <b>Validation Rules</b>      | Ensures correct lease date entries              |
| <b>Email Templates</b>       | Simplifies communication with tenants           |

#### **4. Benefits**

- **Automation:** Reduces manual effort by up to 90%.
- **Accuracy:** Prevents duplicate and invalid records.
- **Transparency:** Enables clear communication between tenants and admins.
- **Efficiency:** Centralizes all lease-related data in one platform.