

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

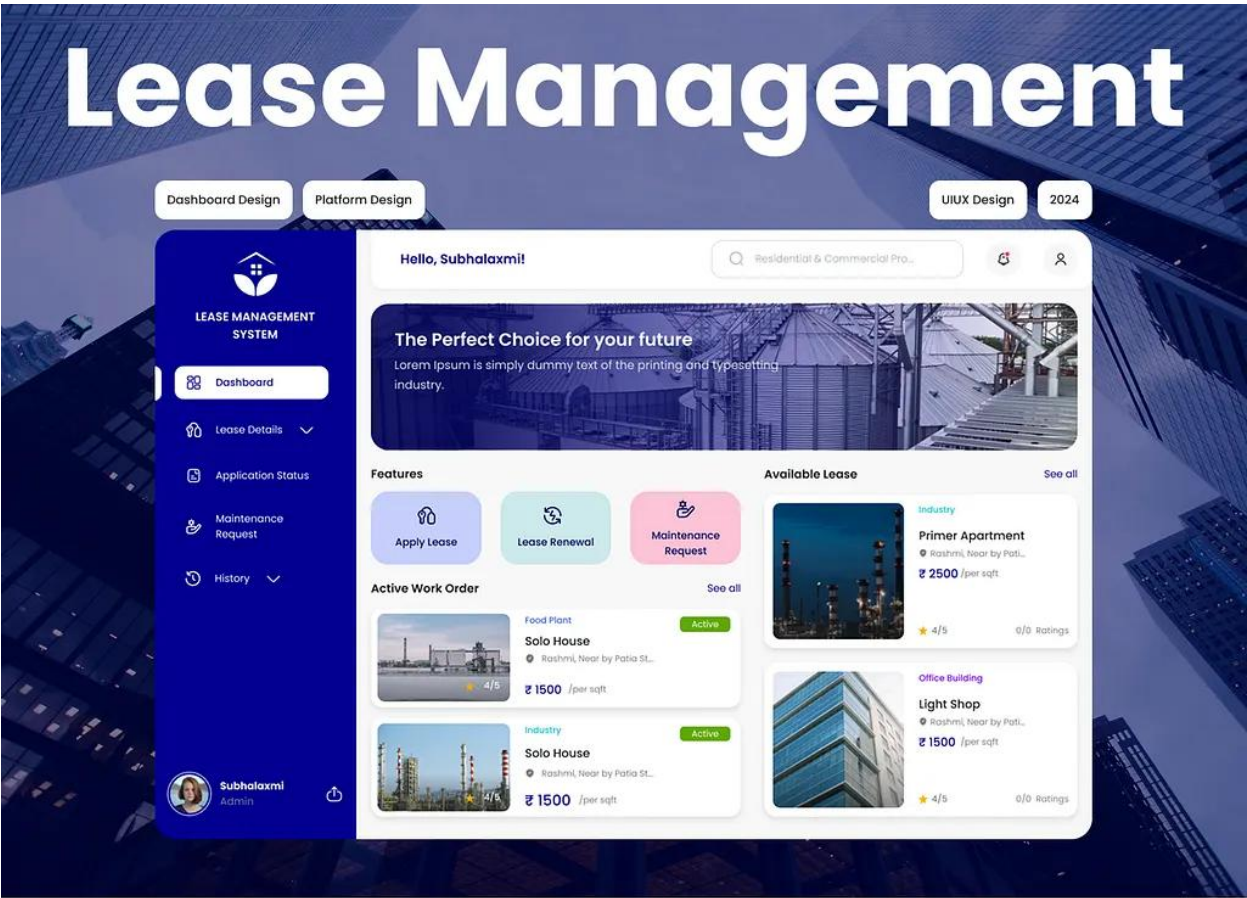
- Tenants can submit leave requests for admin approval.
- The approver receives a notification and can approve or reject, triggering automated email alerts.

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
Record Triggered Flow	Automates payment confirmation emails
Approval Workflow	Manages tenant leave requests
Apex Trigger	Prevents multiple tenants for the same property
Scheduled Apex	Sends monthly rent reminders
Validation Rules	Ensures correct lease date entries
Email Templates	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.