

LEASE MANAGEMENT

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INTRODUCTION

1. Project Overview

The Lease Management System leverages Salesforce to simplify and automate real estate leasing operations. From managing tenants and lease contracts to handling payments and communications, it uses tools like flows, approval processes, and email alerts to ensure efficiency and accuracy. The platform also provides real-time visibility into lease performance, financial records, and tenant activities. This makes it easier for organizations to make informed decisions, improve operational efficiency, and deliver seamless leasing services.

2. Purpose

The primary objective of this project is to empower organizations to efficiently manage properties, tenants, and lease-related activities within a unified system. By introducing automation, the solution reduces the need for manual intervention, thereby saving time and minimizing the chances of human error. It improves accuracy across leasing processes, ensuring that financial transactions, contracts, and tenant records remain consistent and reliable. In addition, the system enhances compliance by providing standardized workflows and timely alerts for approvals, renewals, and payments. Communication between property managers and tenants is also streamlined through built-in tools such as notifications and email alerts. Overall, the project is designed to create a seamless, efficient, and transparent leasing process that benefits both organizations and tenants.

DEVELOPMENT PHASE

1. 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: Lease ✓ Last name: Management ✓

Job title: Developer ✓ Work email: abcd@gmail.com ✓

Company: Salesforce ✓ 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.

We value your privacy. To learn more, visit our [Privacy Statement](#).

2. Created objects: Property, Tenant, Lease, Payment

Property | Salesforce

orgfarm-79b3ffa448-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001xHp3/Details/view

Setup Home Object Manager

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

List View Button Layout

Restriction Rules

Scoping Rules

Details

Description

API Name: Property__c

Custom: ✓

Singular Label: Property

Plural Label: Properties

Enable Reports: ✓

Track Activities: ✓

Track Field History: ✓

Deployment Status: Deployed

Help Settings

[Standard salesforce.com Help Window](#)

Tenant | Salesforce

orgfarm-79b3ffa448-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001x1tt/Details/view

Setup Home Object Manager

SETUP > OBJECT MANAGER

Tenant

Details Edit Delete

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

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Payment for tenant | Salesforce

orgfarm-79b3ffa448-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001x10L/Details/view

Setup Home Object Manager

SETUP > OBJECT MANAGER

Payment for tenant

Details Edit Delete

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

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Lease | Salesforce

orgfarm-79b3ffa448-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001x13Z/Details/view

Setup Home Object Manager

SETUP > OBJECT MANAGER

Lease

Details Edit Delete

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

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

3. Configured fields and relationships

Property | Salesforce

orgfarm-79b3ffa448-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001xHp3/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER

Property

Details

Fields & Relationships

8 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Long Text Area(32768)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Text(18)		
Owner	OwnerId	Lookup(User,Group)		✓
Property Name	Name	Text(80)		✓
sqft	sqft__c	Text(18)		
Type	Type__c	Picklist		

Airplane mode off

Tenant | Salesforce

orgfarm-79b3ffa448-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001xHtt/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER

Tenant

Details

Fields & Relationships

8 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

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

Payment for tenant | Salesforce

orgfarm-79b3ffa448-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001xl0L/FieldsAndRelationships/view

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Payment for tenant

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Fields & Relationships

9 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

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

Lease | Salesforce

orgfarm-79b3ffa448-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001xl3Z/FieldsAndRelationships/view

Setup

Home

Object Manager

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

List View Button Layout

Restriction Rules

Scoping Rules

Fields & Relationships

8 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
End date	End_date__c	Date		
Last Modified By	LastModifiedById	Lookup(User)		
Lease Name	Name	Text(80)		✓
Property	Property__c	Lookup(Property)		✓
Property__c	Property_c__c	Master-Detail(Property)		✓
start date	start_date__c	Date		
Tenant	Tenant__c	Lookup(Tenant)		✓

4. Tabs

The screenshot shows the Salesforce Setup interface for Custom Tabs. The left sidebar contains a search bar with "tabs" and a list of navigation items: "User Interface", "Rename Tabs and Labels", and "Tabs" (which is highlighted). The main content area is titled "Custom Tabs" and includes a "Help for this Page" link. Below the title, there is a paragraph explaining that custom tabs can be created to extend Salesforce functionality. The interface is divided into three sections: "Custom Object Tabs", "Web Tabs", and "Visualforce Tabs". Each section has a "New" button and a "What Is This?" link. The "Custom Object Tabs" section contains a table with four rows, each representing a different object type: "Stack of Cash", "Credit card", "Cell phone", and "Presenter". The "Web Tabs" and "Visualforce Tabs" sections both indicate that no tabs have been defined.

Action	Label	Tab Style	Description
Edit Del	Lease		Stack of Cash
Edit Del	Payment		Credit card
Edit Del	Properties		Cell phone
Edit Del	Tenants		Presenter

5. Developed Lightning App

The screenshot shows the Salesforce Lightning App Builder interface. The left sidebar contains a search bar and a list of navigation items: "App Settings", "App Details & Branding", "App Options", "Utility Items (Desktop Only)", "Navigation Items", and "User Profiles". The "App Settings" section is currently selected. The main content area is titled "App Details & Branding" and includes a paragraph explaining that users can give their Lightning app a name and description, upload an image, and choose the highlight color for its navigation bar. The interface is divided into two columns: "App Details" and "App Branding". The "App Details" column contains fields for "App Name" (set to "Lease Management"), "Developer Name" (set to "Lease_Management"), and "Description" (with a placeholder "Enter a description..."). The "App Branding" column contains an "Image" field (with a placeholder image of a house) and a "Primary Color Hex Value" field (set to "#0070D2"). Below these fields, there is a "Clear" button and a section for "Org Theme Options" with a checkbox labeled "Use the app's image and color instead of the org's custom theme". At the bottom of the page, there is an "App Launcher Preview" section showing a preview of the app's navigation bar with the "Lease Management" app.

6. To create a validation rule to a Lease Object

The screenshot shows the Salesforce Setup interface for the 'Lease' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main content area is titled 'Validation Rules' and shows a table with one rule named 'lease_end_date'. The rule is active and has an error message 'Your End date must be greater than start date'.

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
lease_end_date	start date	Your End date must be greater than start date	✓	Lease Management, 9/2/2025, 8:45 AM

7. Built and tested email templates for leave request, approval, rejection, payment, and reminders

The screenshot shows the Salesforce Setup interface for 'Classic Email Templates'. The left sidebar contains a navigation menu with options like Email, Apex Exception Email, Authorized Email Domains, Classic Email Templates, Classic Letterheads, Compliance BCC Email, DKIM Keys, Delete Attachments Sent as Links, Deliverability, Email Address Internationalization, Email Attachments, Email Delivery Settings, Email Domain Filters, Email Relays, Email Footers, and Email to Salesforce. The main content area is titled 'Classic Email Templates' and shows a form for creating a new email template named 'Leave approved'. The form includes fields for Email Template Name, Template Unique Name, Encoding, Author, Description, and Created By. The 'Leave approved' template is shown with a preview of the email content.

Classic Email Templates

Text Email Template
Leave approved

Preview your email template below.

Email Template Detail

Field	Value
Email Templates from Salesforce	Unfiled Public Classic Email Templates
Email Template Name	Leave approved
Template Unique Name	Leave_approved
Encoding	Unicode (UTF-8)
Author	Lease Management (Change)
Description	
Created By	Lease Management, 9/2/2025, 8:53 AM

Email Template

Subject: Leave approved

Plain Text Preview

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.

Classic Email Templates | Salesf...

orgfarm-79b3ffa448-dev-ed.develop.lightning.force.com/lightning/setup/CommunicationTemplatesEmail/page?address=%2F00XgK000005i9vy%3Fsetupid%3DCommunicationTemplates...

Search Setup

Setup Home Object Manager

email

Email

Apex Exception Email

Authorized Email Domains

Classic Email Templates

Classic Letterheads

Compliance BCC Email

DKIM Keys

Delete Attachments Sent as Links

Deliverability

Email Address Internationalization

Email Attachments

Email Delivery Settings

Email Domain Filters

Email Relays

Email Footers

Email to Salesforce

SETUP

Classic Email Templates

Text Email Template

tenant payment

Preview your email template below.

Email Template Detail

Edit Delete Clone

Email Templates from Salesforce

Email Template Name

tenant payment

Available For Use

✓

Template Unique Name

tenant_payment

Last Used Date

Encoding

Unicode (UTF-8)

Times Used

Author

Lease Management (Change)

Description

Created By

Lease Management 9/2/2025, 9:01 AM

Modified By

Lease Management 9/2/2025, 9:01 AM

Edit Delete Clone

Email Template

Send Test and Verify Merge Fields

Subject

Confirmation of Successful Monthly Payment

Plain Text Preview

Dear {!Tenant__c.Email__c},

We hope this email finds you well. We are writing to inform you that we have successfully received your monthly payment. Thank you for your prompt and diligent payment.

Classic Email Templates | Salesf...

orgfarm-79b3ffa448-dev-ed.develop.lightning.force.com/lightning/setup/CommunicationTemplatesEmail/page?address=%2F00XgK000005i9CV%3Fsetupid%3DCommunicationTemplates...

Search Setup

Setup Home Object Manager

email

Email

Apex Exception Email

Authorized Email Domains

Classic Email Templates

Classic Letterheads

Compliance BCC Email

DKIM Keys

Delete Attachments Sent as Links

Deliverability

Email Address Internationalization

Email Attachments

Email Delivery Settings

Email Domain Filters

Email Relays

Email Footers

Email to Salesforce

SETUP

Classic Email Templates

Text Email Template

Tenant Email

Preview your email template below.

Email Template Detail

Edit Delete Clone

Email Templates from Salesforce

Email Template Name

Tenant Email

Available For Use

✓

Template Unique Name

Tenant_Email

Last Used Date

Encoding

Unicode (UTF-8)

Times Used

Author

Lease Management (Change)

Description

Created By

Lease Management 9/2/2025, 8:57 AM

Modified By

Lease Management 9/6/2025, 5:08 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.

This communication is a friendly reminder regarding your monthly rent payment, which is currently outstanding. As outlined in

Classic Email Templates | Salesforce

orgfarm-79b3ffa448-dev-ed.develop.lightning.force.com/lightning/setup/CommunicationTemplatesEmail/page?address=%2F00XgK000005iBMf%3Fsetupid%3DCommunicationTemplates...

Search Setup

Setup Home Object Manager

email

Email

- Apex Exception Email
- Authorized Email Domains
- Classic Email Templates
- Classic Letterheads
- Compliance BCC Email
- DKIM Keys
- Delete Attachments Sent as Links
- Deliverability
- Email Address Internationalization
- Email Attachments
- Email Delivery Settings
 - Email Domain Filters
 - Email Relays
 - Email Footers
 - Email to Salesforce

Text Email Template

tenant leaving

Preview your email template below.

Help for this Page

Email Template Detail Edit Delete Clone

Email Templates from Salesforce	Unfiled Public Classic Email Templates	Available For Use	<input checked="" type="checkbox"/>
Email Template Name	tenant leaving	Last Used Date	
Template Unique Name	tenant_leaving	Times Used	
Encoding	Unicode (UTF-8)		
Author	Lease Management (Change)		
Description			
Created By	Lease Management 9/2/2025, 8:51 AM	Modified By	Lease Management 9/6/2025, 5:06 AM

Text Email Template: tenant leaving - Salesforce - Developer Edition

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

https://orgfarm-79b3ffa448-dev-ed.develop.my.salesforce.com/one/one-app#/alohaRedirect/00XgK000005iBMf?setupId=CommunicationTemplatesEmail&sdtp=p1

8. Approval Process creation

For Tenant Leaving:

Approval Processes | Salesforce

orgfarm-79b3ffa448-dev-ed.develop.lightning.force.com/lightning/setup/ApprovalProcesses/page?address=%2F04agK000000Ciz3

Search Setup

Setup Home Object Manager

appr

Data

- Mass Transfer Approval Requests

Feature Settings

- Approval Settings

Process Automation

- Approval Processes

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

Approval Processes

Approval Processes

Tenant: Tenant Approval

< Back to Approval Process List

Process Definition Detail Edit Clone Delete Activate

Process Name	Tenant Approval	Active	<input type="checkbox"/>
Unique Name	Tenant_Approval	Next Automated Approver Determined By	
Description			
Entry Criteria	Tenant: Status EQUALS Stay		
Record Editability	Administrator ONLY	Allow Submitters to Recall Approval Requests	<input type="checkbox"/>
Approval Assignment Email Template			
Initial Submitters	Tenant Owner		
Created By	Lease Management 9/6/2025, 10:51 AM	Modified By	Lease Management 9/6/2025, 10:55 AM

Initial Submission Actions Add Existing Add New

Action Type	Description
Record Lock	Lock the record from being edited

Approval Steps New Approval Step

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Show Actions Edit Del	1	Tenant Approval			Manually Chosen	Final Rejection

For Check for Vacant:

The screenshot shows the Salesforce Setup interface for Approval Processes. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area displays the 'Approval Processes' setup page for a process named 'check for vacant'. The process is currently inactive. The 'Process Definition Detail' section shows the process name, unique name, description, entry criteria, record editability, approval assignment email template, initial submitters, and created by. The 'Initial Submission Actions' section shows a table with actions like Record Lock and Email Alert. The 'Approval Steps' section shows a message indicating that no approval steps have been defined yet.

Approval Processes | Salesforce

orgfarm-79b3ffa448-dev-ed.develop.lightning.force.com/lightning/setup/ApprovalProcesses/page?address=%2F04agK000000CZbV

Search Setup

Setup Home Object Manager

Q appr

Data

Mass Transfer Approval Requests

Feature Settings

Approval Settings

Process Automation

Approval Processes

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

Approval Processes

Tenant: check for vacant

Back to Approval Process List

Process Definition Detail

Edit Clone Delete

Process Name check for vacant Active ☐ 1

Unique Name check_for_vacant Next Automated Approver Determined By

Description

Entry Criteria Tenant: Status NOT EQUAL TO Leaving

Record Editability Administrator ONLY Allow Submitters to Recall Approval Requests ☐

Approval Assignment Email Template

Initial Submitters Tenant Owner

Created By Lease Management 9/6/2025, 5:16 AM Modified By Lease Management 9/6/2025, 5:19 AM

Initial Submission Actions

Add Existing Add New

Action	Type	Description
Record Lock		Lock the record from being edited
Email Alert		please approve my leave

Approval Steps

New Approval Step

You have not yet defined any approval steps

9. Apex Trigger

Create an Apex Trigger

The screenshot shows the Salesforce Developer Console. The top bar displays the 'test.apxt' file. The code editor shows an Apex trigger named 'trigger test on Tenant__c (before insert)'. The trigger logic is as follows:

```
1 trigger test on Tenant__c (before insert)
2 {
3   if(trigger.isInsert && trigger.isBefore){
4     testHandler.preventInsert(trigger.new);
5   }
6 }
7
8
9
10
11 }
```

The bottom of the console shows the 'Logs' tab, which is currently empty. The 'Filter' button is visible at the bottom left.

Approval Processes | Salesforce

Developer Console

orgfarm-79b3ffa448-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage

File Edit Debug Test Workspace Help

test.apxt

Code Coverage: None API Version: 64 Go To

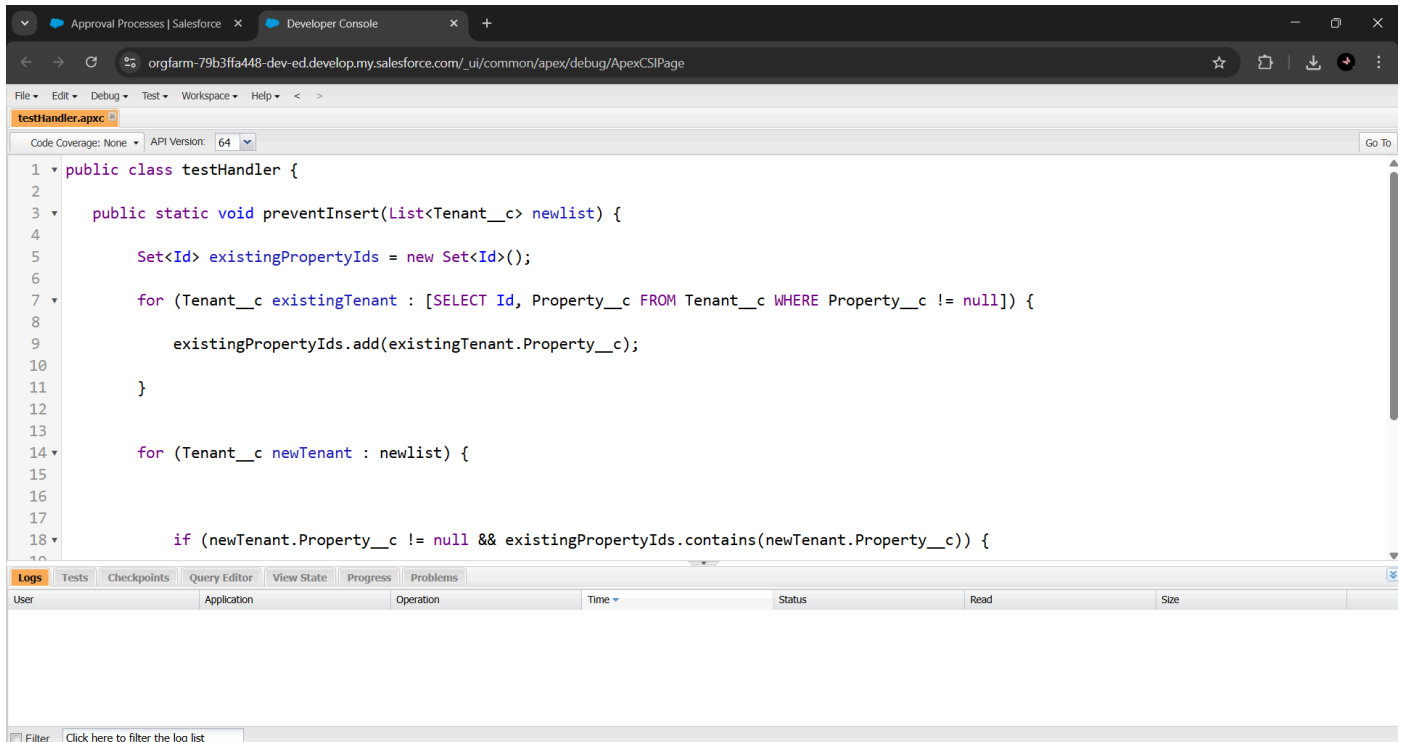
```
1 trigger test on Tenant__c (before insert)
2 {
3   if(trigger.isInsert && trigger.isBefore){
4     testHandler.preventInsert(trigger.new);
5   }
6 }
7
8
9
10
11 }
```

Logs Tests Checkpoints Query Editor View State Progress Problems

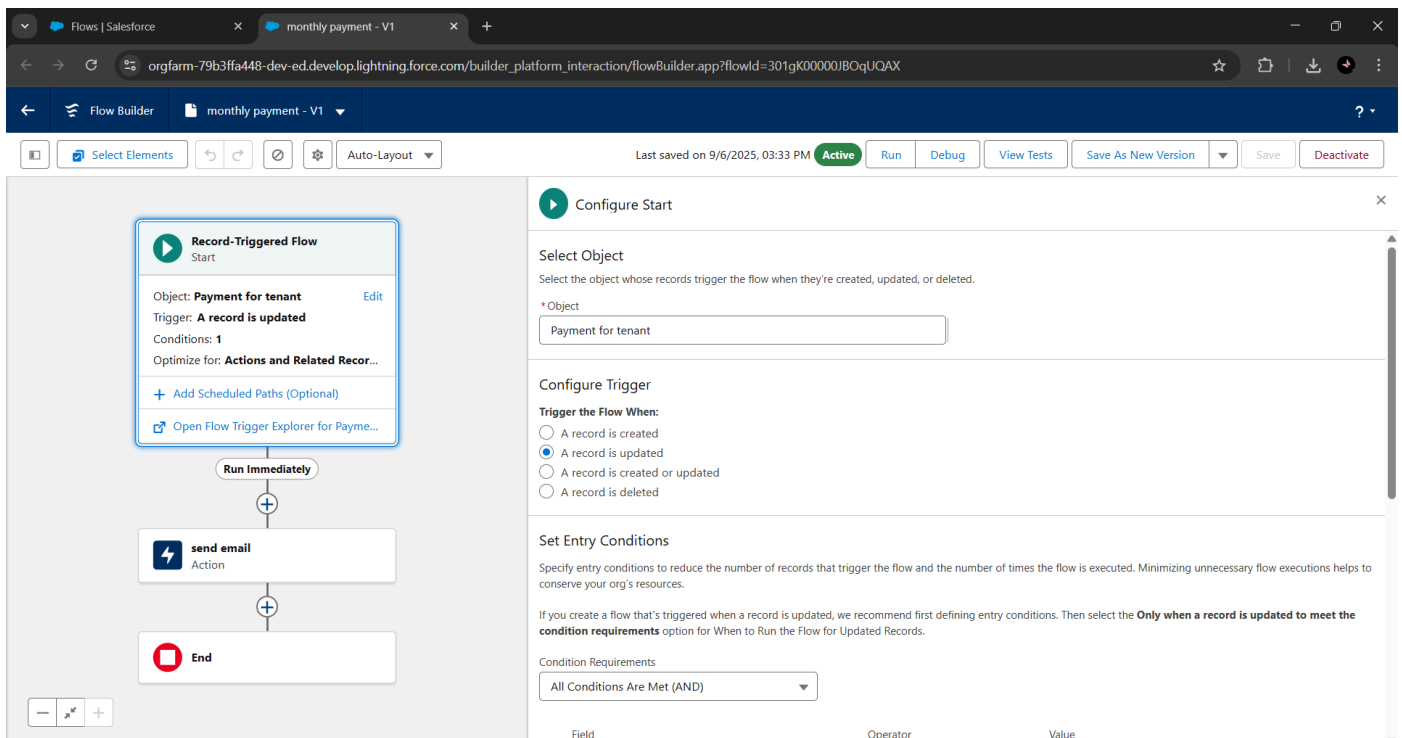
User	Application	Operation	Time	Status	Read	Size
------	-------------	-----------	------	--------	------	------

Filter Click here to filter the log list

Create an Apex Handler class



10. FLOWS



The screenshot shows the Salesforce Flow Builder interface. The flow is titled 'monthly payment - V1'. It is a Record-Triggered Flow that starts when a record of type 'Payment for tenant' is updated. The flow has one condition: '1'. The flow is optimized for 'Actions and Related Records'. The flow contains a 'Send Email' action. The 'Send Email' action is configured with the following settings:

- Label: send email
- API Name: send_email
- Description: (empty)
- Configure Recipient Details:
 - Recipient Address List: A ...ing Payment_for_tenant_c > Tenant > Email
 - Recipient Address Collection: (empty)
 - CC Recipient Address List: (empty)

11. Schedule class:

Create an Apex Class

The screenshot shows the Salesforce Developer Console with the 'MonthlyEmailScheduler.apex' class open. The class implements the 'Schedulable' interface. The code is as follows:

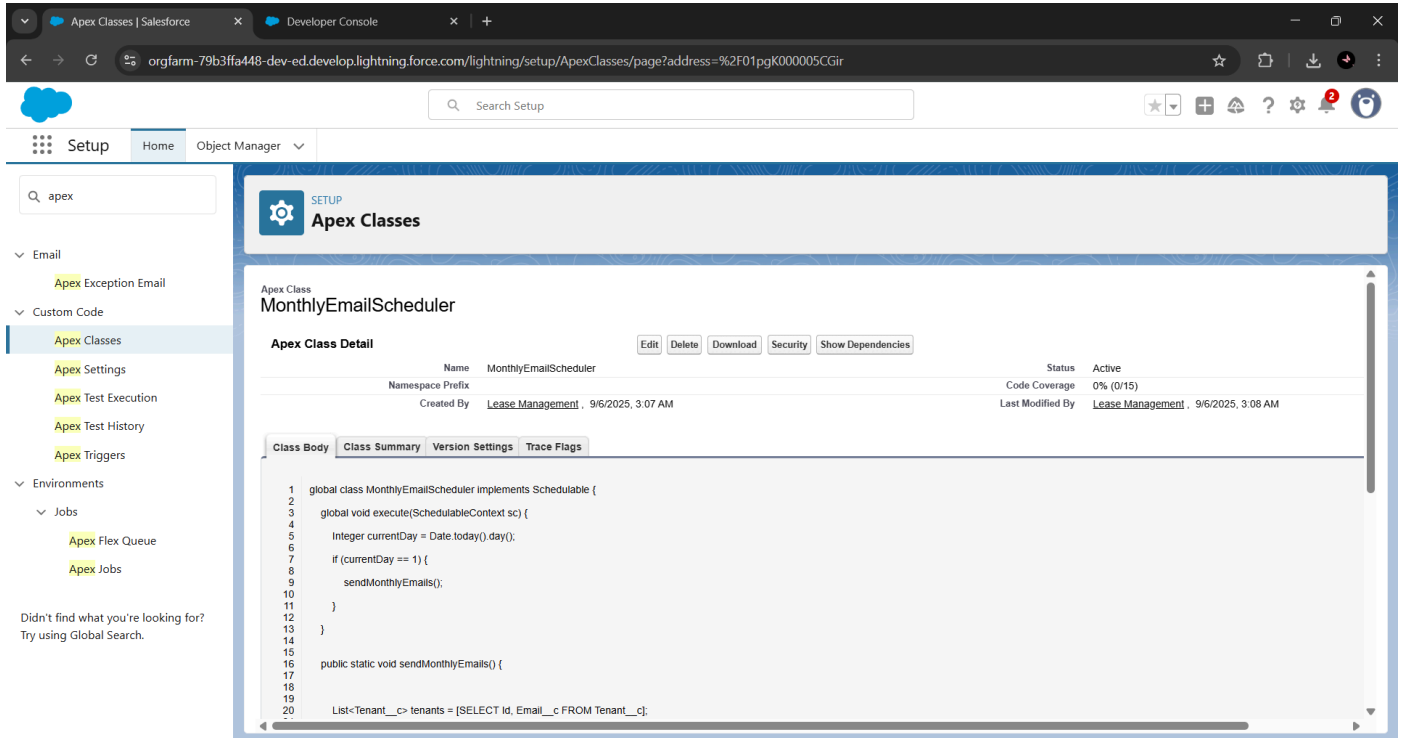
```

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 public static void sendMonthlyEmails() {
16
17
18
19
20

```

The console also shows a table with columns: User, Application, Operation, Time, Status, Read, and Size. The table is currently empty.

Schedule Apex class



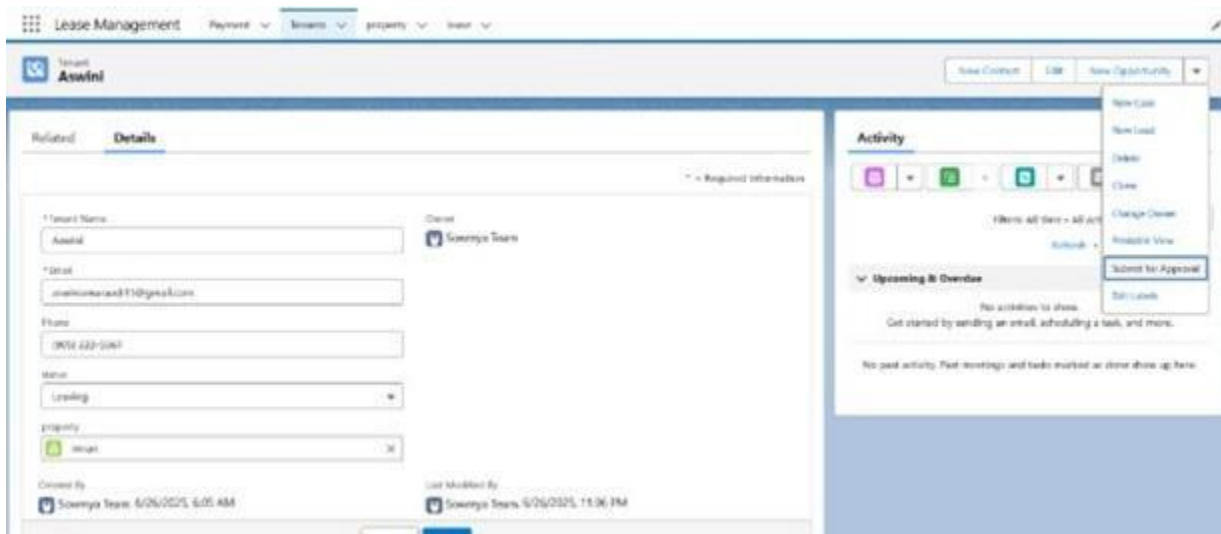
The screenshot shows the Salesforce Setup page for Apex Classes. The left sidebar contains a search bar with "apex" and a list of categories: Email, Custom Code, Apex Classes (selected), Apex Settings, Apex Test Execution, Apex Test History, Apex Triggers, Environments, Jobs, Apex Flex Queue, and Apex Jobs. The main content area is titled "Apex Classes" and shows the details for the "MonthlyEmailScheduler" class. The class is active, created by "Lease Management" on 9/6/2025 at 3:07 AM, and has 0% code coverage. The class body is visible, showing the implementation of the "execute" method.

Apex Class Detail

Name	MonthlyEmailScheduler	Status	Active
Namespace Prefix		Code Coverage	0% (0/15)
Created By	Lease Management	Last Modified By	Lease Management

Class Body

```
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   public static void sendMonthlyEmails() {
16
17     List<Tenant__c> tenants = [SELECT Id, Email__c FROM Tenant__c];
18
19
20 }
```



The screenshot shows the Salesforce Lease Management page. The left sidebar contains a search bar with "Lease Management" and a list of categories: Tenant, Property, and Lease. The main content area is titled "Lease Management" and shows the details for a tenant named "Aashvi". The tenant is associated with the "Sowmya Team". The page includes fields for Tenant Name, Email, Phone, and Property. The "Details" tab is selected, and the "Activity" section shows a list of activities. A dropdown menu is open, showing options like "New Case", "New Lead", "Delete", "Clone", "Change Owner", "Revoke View", "Submit for Approval", and "Edit Leads".

Lease Management

Tenant Details

Tenant Name: Aashvi

Email: aashvi.kumarand11@gmail.com

Phone: (954) 222-0045

Property: 10000

Created By: Sowmya Team

Last Modified By: Sowmya Team

Activity

Upcoming & Overdue

Submit for Approval

Lease Management
Payment
Tenants
property
lease

Tenant: **Aswini**
Tenant was submitted for approval.
New Contact
5.25
New Opportunity

Related
Details

* Required Information

Tenant Name:

Owner: Sowmya Team

Email:

Phone:

Status: Leasing

Property: Irivan

Created By: Sowmya Team, 6/26/2025, 6:05 AM

Last Modified By: Sowmya Team, 6/26/2025, 11:06 PM

Cancel
Save

Activity

Where: 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.

Lease Management
Payment
Tenants
property
lease
Aswini Approval
3

Business Insurance Step
Tenant Approval
Approved

Submitted: Sowmya Team
Date Submitted: Jun 27, 2025
Actual Approved: Sowmya Team
Assigned To: Sowmya Team

Details

Approval Details

Tenant Name:
Owner: Sowmya Team

Property:

No C

Notifications
TOTAL: 08 JUN 2025

Approval request for the tenant is approved
Aswini
a few seconds ago

Approval request for the tenant is rejected
Aswini
an hour ago

Approval request for the tenant is approved
Aswini
an hour ago

Approval request for the tenant is approved
Aswini
an hour ago

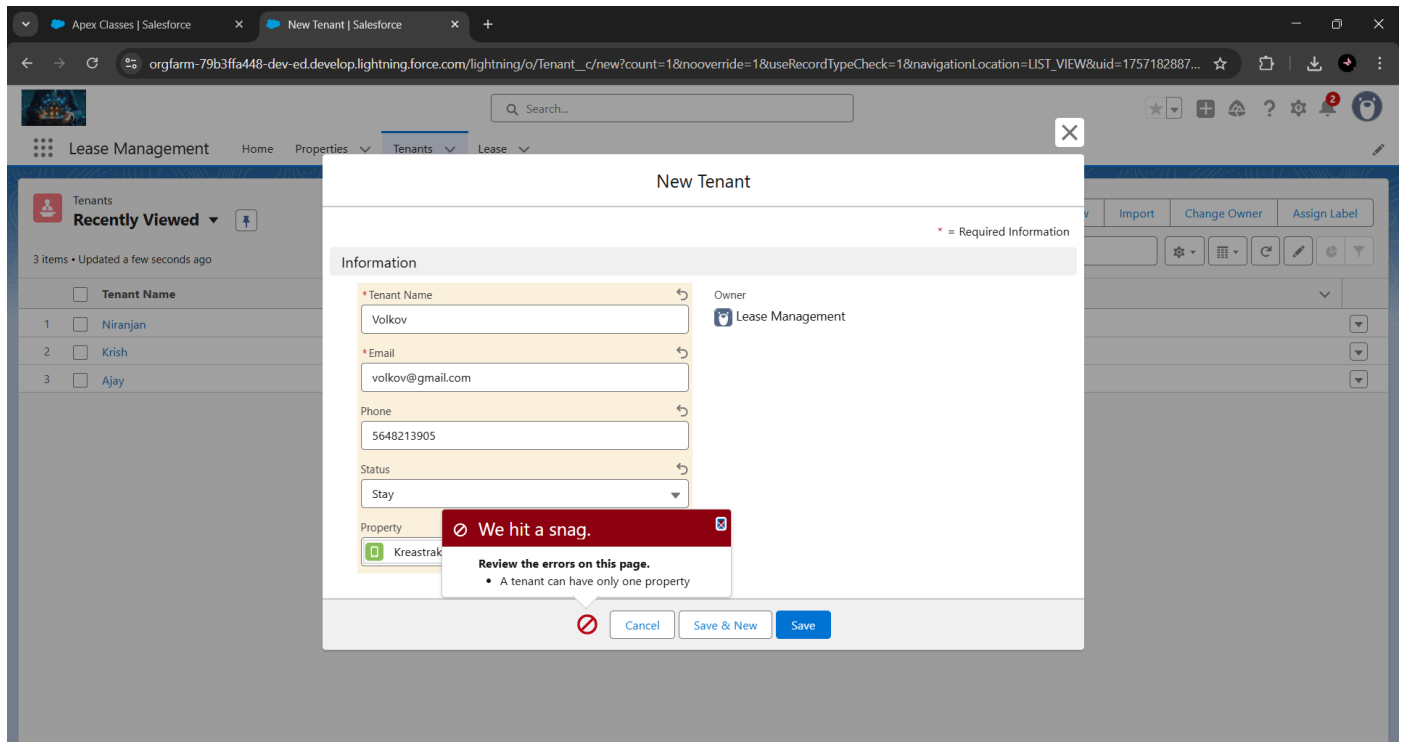
Approval request for the tenant is approved
Aswini
an hour ago

Approval request for the tenant is approved
Aswini
10 hours ago

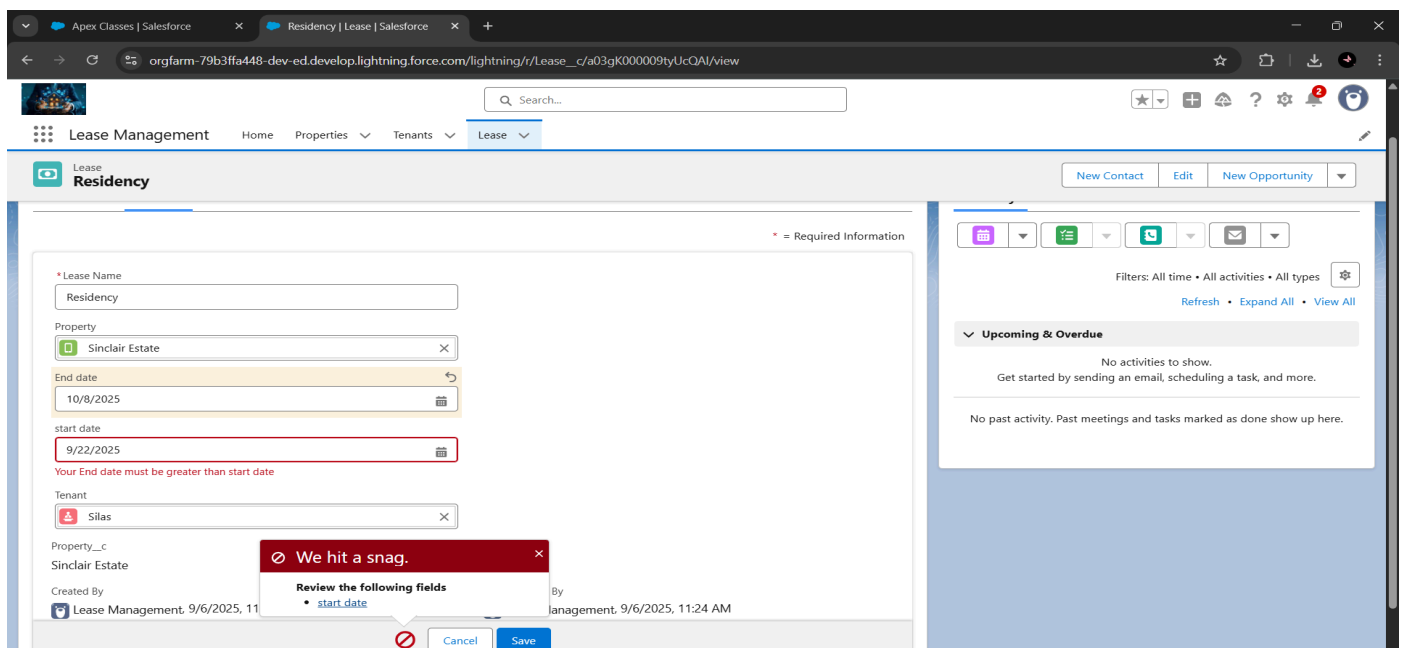
FUNCTIONAL AND PERFORMANCE TESTING

1. Performance Testing

Trigger validation by entering duplicate tenant-property records



Validation Rule checking



ADVANTAGES & DISADVANTAGES

Advantages

1. **Operational Efficiency** – Automates routine tasks such as lease renewals, payment tracking, and tenant communication, reducing manual workload and saving time.
2. **Improved Accuracy** – Minimizes human errors in contracts, financial records, and compliance requirements through automated workflows and validations.
3. **Enhanced Compliance** – Ensures adherence to lease terms, legal obligations, and organizational policies with built-in approval processes and alerts.
4. **Centralized Data Management** – Provides a single platform to store and manage tenant information, lease documents, and financial data, improving accessibility and transparency.
5. **Better Communication** – Strengthens engagement between property managers and tenants through automated notifications, reminders, and email alerts.
6. **Scalability** – Supports organizational growth by handling an increasing number of properties, tenants, and contracts without additional manual effort.
7. **Data-Driven Insights** – Offers reporting and analytics features for informed decision-making and strategic planning.

Disadvantages

1. **High Initial Setup Cost** – Implementation may require significant investment in customization, licensing, and integration with existing systems.
2. **Training Requirements** – Users may need training to fully understand and utilize Salesforce features, which can take time and resources.
3. **Dependency on Internet and Platform** – As a cloud-based system, it relies heavily on stable internet connectivity and the Salesforce platform's uptime.
4. **Customization Complexity** – Advanced customization to meet unique business needs may require technical expertise, potentially increasing dependency on developers.
5. **Data Security Concerns** – Although Salesforce provides strong security, organizations must still manage data privacy risks, especially when handling sensitive tenant and financial information.
6. **Change Management Challenges** – Transitioning from traditional methods to an automated system may face resistance from staff who are accustomed to manual processes.

CONCLUSION

The Lease Management System is a Salesforce-driven solution that transforms the way organizations manage properties, tenants, and lease-related activities. By automating key processes, centralizing data, and improving communication, it reduces manual effort, enhances accuracy, and ensures stronger compliance with regulatory and organizational standards. While the project may involve challenges such as implementation costs, training requirements, and change management, these are outweighed by its long-term advantages, including operational efficiency, scalability, and improved tenant satisfaction. Overall, the system not only streamlines leasing operations but also equips organizations with the tools to make data-driven decisions, strengthen relationships, and achieve sustainable growth in an increasingly competitive real estate landscape.

APPENDIX

Source Code: Provided in Apex Classes and Triggers

Test.apxt:

Trigger Code:

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});  
}  
}  
}
```