

PROJECT TITLE: LEASE MANAGEMENT

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INTRODUCTION

Project Overview

The Lease Management System is a **Salesforce-based cloud application** developed to simplify and optimize the end-to-end process of managing real estate properties and rental agreements. In traditional leasing, property owners or managers often face challenges such as manual record keeping, lack of timely reminders, difficulty in tracking payments, and miscommunication between tenants and administrators.

To overcome these challenges, the proposed Lease Management System makes use of **Salesforce CRM's powerful features** such as **custom objects, process automation, approval processes, validation rules, and Apex programming**. These tools together form a robust solution that eliminates manual dependency and ensures greater efficiency.

The system allows administrators to manage all critical aspects of leasing, including:

Maintaining property records (houses, flats, shops, tents, stalls, etc.).

Storing tenant details with personal and communication information.

Creating and monitoring lease agreements.

Tracking monthly rent payments and generating reminders.

Automating lease approval workflows to reduce delays and errors.

Furthermore, the solution supports **real-time property status updates** (Vacant/Occupied), **email alerts** for tenants, **scheduled tasks** for monthly rent reminders, and **restriction mechanisms** to prevent incorrect data entry. By integrating all lease-related activities in a single platform, this system ensures improved transparency, accountability, and overall operational excellence.

What is this project?

We are building a simple **Lease Management System** inside Salesforce. It's like a digital notebook to keep track of:

Your **Properties** (Houses, Apartments you own)

Your **Tenants** (People who rent from you)

Their **Lease Agreements** (The contract that says who rents what, and for how much)

Their **Payments** (When they pay the rent)

Our goal is to make this notebook smart so it can stop us from making mistakes, like renting the same property to two people.



Purpose

The primary purpose of this project is to build a **centralized and automated lease management platform** that can benefit property owners, administrators, and tenants alike. The goals include:

Automation of Lease Operations: Reduce manual efforts by automating repetitive tasks such as property status updates, payment reminders, and lease expiration notifications.

Real-Time Tracking of Properties: Provide instant visibility of whether a property is available (Vacant) or occupied, thereby improving utilization and reducing idle time.

Streamlined Tenant Management: Maintain accurate and complete tenant records including contact information, lease history, and payment status.

Improved Accuracy in Rent Collection: Minimize errors in rent calculation, ensure timely payments, and generate alerts for pending dues.

Enhanced Communication: Use Salesforce features like email alerts, approval notifications, and scheduled reminders to keep both tenants and managers informed at all times.

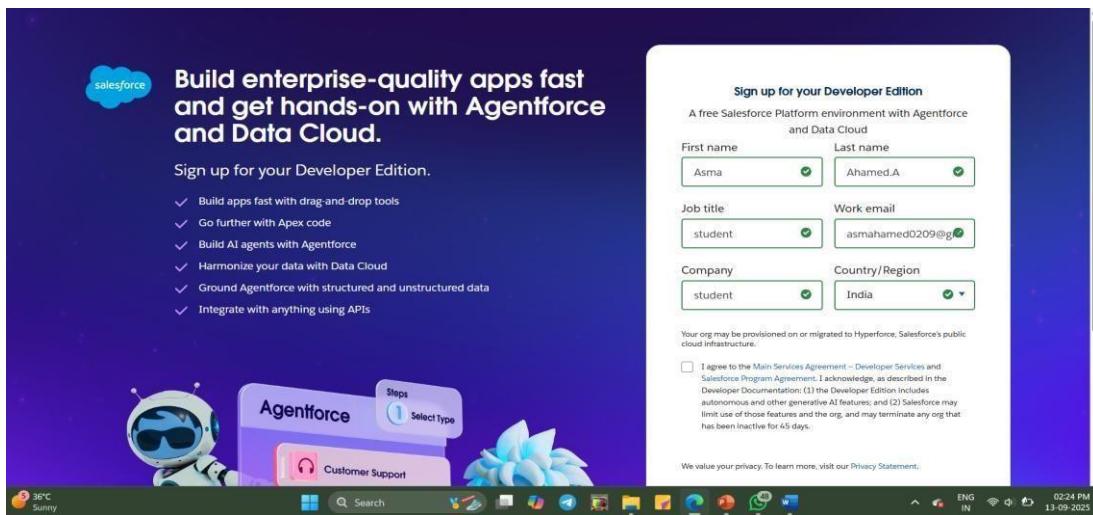
Scalability and Flexibility: Design the system to handle different types of rental assets (tents, shops, apartments, offices) and easily adapt to future enhancements.

By achieving these objectives, the Lease Management System not only simplifies administrative workloads but also enhances tenant satisfaction and ensures steady financial management for property owners.

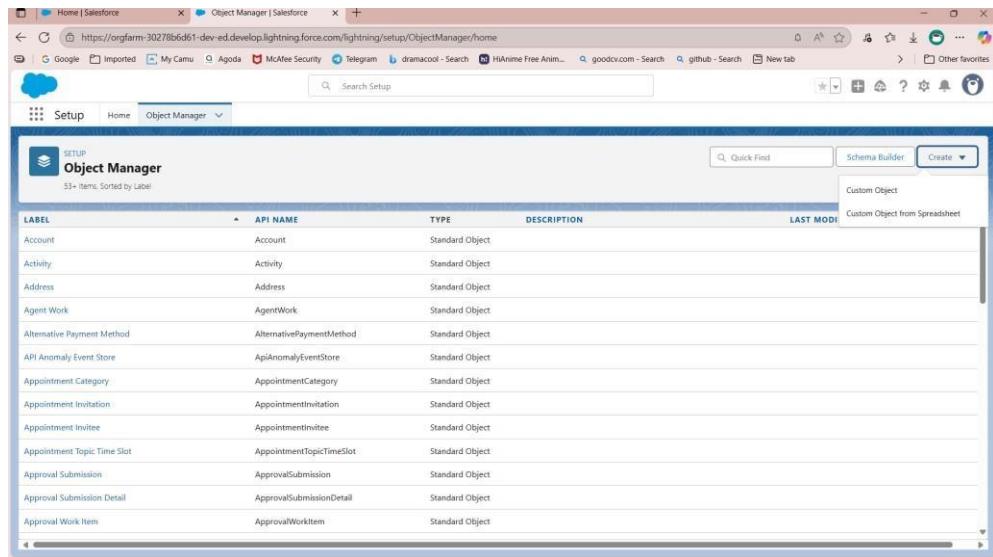
DEVELOPMENT PHASE

Creating Developer Account:

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

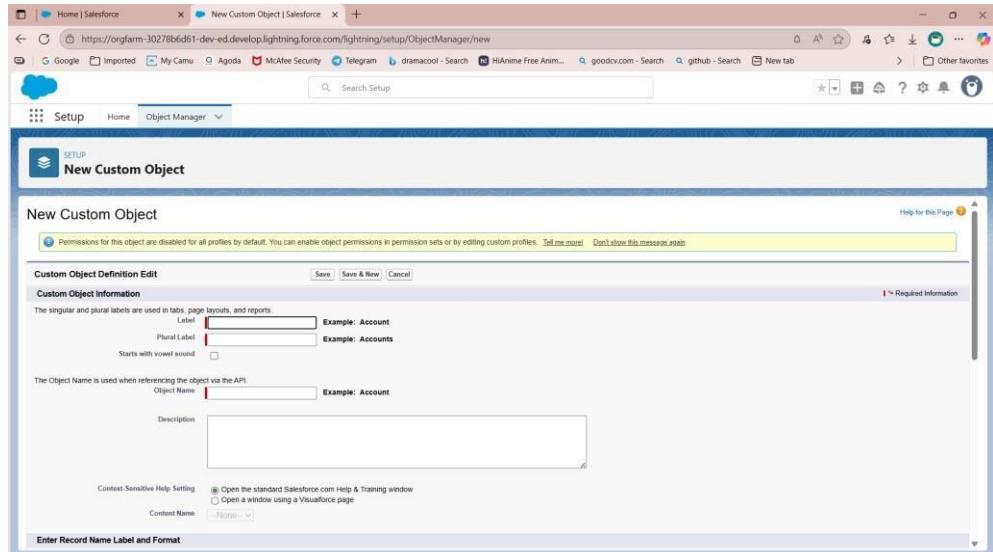
A screenshot of the Salesforce Seller Home dashboard. The dashboard features several key performance indicators (KPIs) and links. At the top, it says "Good afternoon, Asma. Let's get selling!" Below this are three main sections: "Close Deals" (Opportunities owned by me and closing this quarter), "Plan My Accounts" (Accounts owned by me), and "Grow Relationships" (Contacts owned by me and created in the last 90 days). Each section includes a circular summary and a "View [Object]" button. Below these are two more sections: "Build Pipeline" (Leads owned by me and created in the last 30 days) and "My Goals" (Set personal weekly or monthly goals for emails, calls, and meetings). A "Stay ahead of incidents" notification is visible in the bottom right corner, encouraging users to use the free Customer Service Incident Management solution from Service Cloud. The browser address bar shows the URL <https://orgfarm-30278b6d61-dev-ed.lightning.force.com/lightning/page/home>.

CREATED OBJECTS: PROPERTY, TENANT, LEASE, PAYMENT



The screenshot shows the Salesforce Object Manager interface. The page title is "Object Manager | Salesforce". The main content area displays a table of standard objects with columns: Label, API Name, Type, Description, and Last Mode. The "Last Mode" column shows "Custom Object from Spreadsheet". A "Create" button is located at the top right of the table.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODE
Account	Account	Standard Object		Custom Object from Spreadsheet
Activity	Activity	Standard Object		
Address	Address	Standard Object		
Agent Work	AgentWork	Standard Object		
Alternative Payment Method	AlternativePaymentMethod	Standard Object		
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object		
Appointment Category	AppointmentCategory	Standard Object		
Appointment Invitation	AppointmentInvitation	Standard Object		
Appointment Invitee	AppointmentInvitee	Standard Object		
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object		
Approval Submission	ApprovalSubmission	Standard Object		
Approval Submission Detail	ApprovalSubmissionDetail	Standard Object		
Approval Work Item	ApprovalWorkItem	Standard Object		



The screenshot shows the "New Custom Object" setup page. The page title is "New Custom Object | Salesforce". The main content area is titled "Custom Object Definition Edit" and contains fields for "Custom Object Information" and "The Object Name is used when referencing the object via the API". The "Custom Object Information" section includes fields for "Label" (set to "Account"), "Plural Label" (set to "Accounts"), and "Starts with vowel sound" (unchecked). The "Object Name" field is set to "Account". A note at the bottom states: "Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles." Buttons at the top include "Save", "Save & New", and "Cancel".

<https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/setup/CustomeTab/page?address=%2Fsetup%2Fu%2FobjectCustomTabWizard.jsp%3FretURL%3D%252f01gK...>

<https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/setup/CustomeTab/page?address=%2Fsetup%2Fu%2FobjectCustomTabWizard.jsp%3FretURL%3D%252f01gK...>

<https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/setup/CustomeTab/page?address=%2Fsetup%2Fu%2FobjectCustomTabWizard.jsp%3FretURL%3D%252f01gK...>

Custom App	Include Tab
Platform (standard_Platform)	<input checked="" type="checkbox"/>
Sales (standard_Sales)	<input checked="" type="checkbox"/>
Service (standard_Service)	<input checked="" type="checkbox"/>
Marketing CRM Classic (standard_Marketing)	<input checked="" type="checkbox"/>
Sample Console (standard_ServiceConsole)	<input checked="" type="checkbox"/>
High Volume Customer Portal User	<input checked="" type="checkbox"/>
Authenticated Website User	<input checked="" type="checkbox"/>
App Launcher (standard_AppLauncher)	<input checked="" type="checkbox"/>
Community (standard_Community)	<input checked="" type="checkbox"/>
Site.com (standard_Sites)	<input checked="" type="checkbox"/>
Salesforce Chatter (standard_Chatter)	<input checked="" type="checkbox"/>
Content (standard_Content)	<input checked="" type="checkbox"/>
Analytics Studio (standard_Insights)	<input checked="" type="checkbox"/>
Sales Console (standard_LightningSalesConsole)	<input checked="" type="checkbox"/>
Service Console (standard_LightningService)	<input checked="" type="checkbox"/>
Sales (standard_LightningSales)	<input checked="" type="checkbox"/>
Lightning Usage App (standard_LightningInstrumentation)	<input checked="" type="checkbox"/>
Digital Experiences (standard_SalesforceCMS)	<input checked="" type="checkbox"/>

Setup Home Object Manager

Tenant

Custom Object Definition Edit

Custom Object Information

The singular and plural labels are used in lists, page layouts, and reports. Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label: Tenant **Plural Label:** Tenants **Example:** Account

Object Name: Tenant **Description:**

Content Name:

Context Sensitive Help Setting: Open the standard Salesforce.com Help & Training window

Record Name: Tenant Name **Example:** Account Name

Data Type: Text **Warning:** If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.

Setup Home Object Manager

Tabs

New Custom Object Tab

Step 1. Enter the Details

Choose the custom object for this new custom tab. Fill in other details.

New Custom Object Tab

Select an existing custom object or **Create a new custom object now**

Object: Tenant **Tab Style:** People

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link: None

Description:

Next **Cancel**

Setup Home Object Manager

Tabs

New Custom Object Tab

Step 2. Add to Profiles

Choose the user profiles for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each profile.

Apply one tab visibility to all profiles (Default On)

Apply a different tab visibility for each profile

Profile	Tab Visibility
Analytics Cloud Integration User	Default On
Analytics Cloud Security User	Default On
AnyPoint Integration	Default On
Authenticated Website	Default On
Authenticated Website	Default On
B2B Reordering Portal Buyer Profile	Default On
Contact Manager	Default On
Cross Org Data Proxy User	Default On
Custom: Marketing Profile	Default On
Custom: Sales Profile	Default On
Custom: Support Profile	Default On
Customer Community Login User	Default On
Customer Community Plus Login User	Default On
Customer Community Plus User	Default On

Step 3. Add to Custom Apps

Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.

Custom App	Include Tab
Platform (standard_Platform)	<input checked="" type="checkbox"/>
Sales (standard_Sales)	<input checked="" type="checkbox"/>
Service (standard_Service)	<input checked="" type="checkbox"/>
Marketing CRM Classic (standard_Marketing)	<input checked="" type="checkbox"/>
Sample Console (standard_ServiceConsole)	<input checked="" type="checkbox"/>
High Volume Customer Portal User	<input checked="" type="checkbox"/>
Authenticated Website User	<input checked="" type="checkbox"/>
App Launcher (standard_AppLauncher)	<input checked="" type="checkbox"/>
Community (standard_Community)	<input checked="" type="checkbox"/>
Site.com (standard_Sites)	<input checked="" type="checkbox"/>
Salesforce Chatter (standard_Chatter)	<input checked="" type="checkbox"/>
Content (standard_Content)	<input checked="" type="checkbox"/>
Analytics Studio (standard_Insights)	<input checked="" type="checkbox"/>
Sales Console (standard_LightningSalesConsole)	<input checked="" type="checkbox"/>
Service Console (standard_LightningService)	<input checked="" type="checkbox"/>
Sales (standard_LightningSales)	<input checked="" type="checkbox"/>
Lightning Usage App (standard_LightningInstrumentation)	<input checked="" type="checkbox"/>
Digital Experiences (standard_SalesforceCMS)	<input checked="" type="checkbox"/>

SETUP > OBJECT MANAGER

Tenant

Details

Description	<input checked="" type="checkbox"/>
API Name	Tenant_c
Custom	<input checked="" type="checkbox"/>
Singular Label	Tenant
Plural Label	Tenants
Enable Reports	<input checked="" type="checkbox"/>
Track Activities	<input checked="" type="checkbox"/>
Track Field History	<input checked="" type="checkbox"/>
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
- Restriction Rules
- Scoping Rules
- Object Access
- Triggers
- Flow Triggers
- Validation Rules

SETUP > OBJECT MANAGER

Tenant

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)	<input checked="" type="checkbox"/>	
Tenant Name	Name	Text(80)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Fields & Relationships

- Page Layouts
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- Flow Triggers
- Validation Rules

SETUP > OBJECT MANAGER Tenant

Fields & Relationships

External Lookup Relationship

- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.
- The relationship field allows users to click on a lookup icon to select a value from a pop-up list. The master object is the source of the values in the list.
- Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Allows users to select a True (checked) or False (unchecked) value.

Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Allows users to enter a date or pick a date from a popup calendar.

Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.

Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

Allows users to enter any number. Leading zeros are removed.

Allows users to enter a percentage number, for example, "10" and automatically adds the percent sign to the number.

Allows users to enter any phone number. Automatically formats it as a phone number.

Allows users to select a value from a list you define.

Allows users to select multiple values from a list you define.

Allows users to enter any combination of letters and numbers.

Allows users to enter up to 255 characters on separate lines.

Allows users to enter up to 131,072 characters on separate lines.

Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

Allows users to enter any combination of letters and numbers and store them in encrypted form.

Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50:00" are all valid times for this field.

Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

SETUP > OBJECT MANAGER Tenant

New Custom Field

Step 2. Enter the details Step 2 of 4

Field Label: Phone

Field Name: Phone

Description:

Help Text:

Required: Always require a value in this field in order to save a record

Auto add to custom report type: Add this field to existing custom report types that contain this entity

Default Value: Show Formula Editor

Use formula syntax: Enclose text and picklist value API names in double quotes ("text") include numbers without quotes (123) and use the standard formula editor syntax for picklists. To reference a field from a Custom Metadata type record use [CustomMetadataType__mdcRecords[PicklistField__c]]

Previous Next Cancel

Help for this Page

New Custom Field

Step 3. Establish field-level security Step 3 of 4

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input type="checkbox"/>	<input type="checkbox"/>
B2B Reordering Portal Buyer Profile	<input type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Community Admin User	<input type="checkbox"/>	<input type="checkbox"/>

SETUP > OBJECT MANAGER

Tenant

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Restriction Rules
- Scoping Rules
- Object Access
- Triggers
- Flow Triggers

New Custom Field

Step 4. Add to page layouts

Field Label: Phone
Data Type: Phone
Field Name: Phone
Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field Page Layout Name Tenant Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous Save & New Save Cancel

https://orgfarm-30278bb6d61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000002EcKP/FieldsAndRelationships/view

Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER

Tenant

Fields & Relationships

5 items. Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		
Phone	Phone_c	Phone		
Tenant Name	Name	Text(80)		

Quick Find New Deleted Fields Field Dependencies Set History Tracking

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Restriction Rules
- Scoping Rules
- Object Access
- Triggers
- Flow Triggers

https://orgfarm-30278bb6d61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000002EcKP/FieldsAndRelationships/new

Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER

Tenant

Fields & Relationships

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

External Lookup Relationship

Checkbox

Currency

Date

Date/Time

Email

Geolocation

Number

Percent

Phone

Picklist

Picklist (Multi-Select)

Text

Text Area

Text Area (Long)

Text Area (Rich)

Text (Encrypted)

Time

URL

Allows users to select a True (checked) or False (unchecked) value.

Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Allows users to enter a date or pick a date from a pop-up calendar.

Allows users to enter a date and time, or pick a date from a pop-up calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.

Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

Allows users to enter any number. Leading zeros are removed.

Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.

Allows users to enter any phone number. Automatically formats it as a phone number.

Allows users to select a value from a list you define.

Allows users to select multiple values from a list you define.

Allows users to enter any combination of letters and numbers.

Allows users to enter up to 256 characters on separate lines.

Allows users to enter up to 131,072 characters on separate lines.

Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

Allows users to enter any combination of letters and numbers and store them in encrypted form.

Allows users to enter a local time. For example, '2:40 PM', '14:40', '14:40:00', and '14:40:50:600' are all valid times for this field.

Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

Next | Cancel

SETUP > OBJECT MANAGER
Tenant

New Custom Field

Step 2. Enter the details

Field Label: Email
 Field Name: Email
 Description:
 Help Text:

Required: Always require a value in this field in order to save a record
 Unique: Do not allow duplicate values
 External ID: Set this field as the unique record identifier from an external system
 Auto add to custom report type: Add this field to existing custom report types that contain this entity

Default Value: Show Formula Editor
Use formula syntax: Enclose text and point to value API names in double quotes ('the_text'), include numbers without quotes ([2]), where percentages as decimals (0.10), and express date calculations in the standard format ('today') + 7). To reference a field from a Custom Metadata type record use: \$CustomMetadata[Name__c]!RecordPathName!Field__c

Help for this Page

Step 2 of 4

Previous Next Cancel

SETUP > OBJECT MANAGER
Tenant

New Custom Field

Step 3. Establish field-level security

Field Label: Email
 Data Type: Email
 Field Name: Email
 Description:

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input type="checkbox"/>	<input type="checkbox"/>
B2B Reordering Portal Buyer Profile	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input type="checkbox"/>	<input type="checkbox"/>
Custom Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Community Login User	<input type="checkbox"/>	<input type="checkbox"/>

Help for this Page

Step 3 of 4

Previous Next Cancel

SETUP > OBJECT MANAGER
Tenant

New Custom Field

Step 4. Add to page layouts

Field Label: Email
 Data Type: Email
 Field Name: Email
 Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field Page Layout Name
 Tenant Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Help for this Page

Step 4 of 4

Previous Save & New Save Cancel

<https://orgfarm-30278b6d61-dev-ed.lightning.force.com/lightning/setup/ObjectManager/new>

New Custom Object

Custom Object Definition Edit

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label: Example: Account

Plural Label: Example: Accounts

Starts with vowel sound:

The Object Name is used when referencing the object via the API.

Object Name: Example: Account

Description:

Context-Sensitive Help Setting: Open the standard Salesforce.com Help & Training window Open a window using a Visualforce page

Content Name:

Enter Record Name Label and Format

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.

Record Name: Example: Account Name

Data Type: Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.

<https://orgfarm-30278b6d61-dev-ed.lightning.force.com/lightning/setup/Tabs/page?address=%2Fsetup%2Fu%2FobjectCustomTabWizard.jsp%3FretURL%3D%25F...>

Setup Home

Service Setup Assistant

Commerce Setup Assistant

Field Service Setup Home (Beta)

Hyperforce Assistant

Release Updates

Salesforce Mobile App

Lightning Usage

Optimizer

Sales Cloud Everywhere

ADMINISTRATION

- Users
- Data
- Email

PLATFORM TOOLS

- Subscription Management
- Apps
- Feature Settings
- Slack
- Data Cloud

SETUP

Setup

Home

Object Manager

Quick Find

Search Setup

New Custom Object Tab

Step 1. Enter the Details

Choose the custom object for this new custom tab. Fill in other details.

New Custom Object Tab

Select an existing custom object or create a new custom object now.

Object: Tab Style:

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link:

Enter a short description.

Description:

Next | Cancel

<https://orgfarm-30278b6d61-dev-ed.lightning.force.com/lightning/setup/Tabs/page?address=%2Fsetup%2Fu%2FobjectCustomTabWizard.jsp%3FretURL%3D%25F...>

Setup Home

Service Setup Assistant

Commerce Setup Assistant

Field Service Setup Home (Beta)

Hyperforce Assistant

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ADMINISTRATION

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- Data Cloud

SETUP

Setup

Home

Object Manager

Quick Find

Search Setup

New Custom Object Tab

Step 2. Add to Profiles

Choose the user profiles for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each profile.

Profile	Tab Visibility
Analytics Cloud Integration User	<input checked="" type="radio"/> Apply one tab visibility to all profiles (Default On)
Analytics Cloud Security User	<input type="radio"/> Apply a different tab visibility for each profile
Anypoint Integration	<input type="radio"/> Default On
Authenticated Website	<input type="radio"/> Default On
B2B Ordering Portal Buyer Profile	<input type="radio"/> Default On
Contract Manager	<input type="radio"/> Default On
Cross Org Data Proxy User	<input type="radio"/> Default On
Custom: Marketing Profile	<input type="radio"/> Default On
Custom: Sales Profile	<input type="radio"/> Default On
Custom: Support Profile	<input type="radio"/> Default On
Customer Community Login User	<input type="radio"/> Default On
Customer Community Plus Login User	<input type="radio"/> Default On
Customer Community Plus User	<input type="radio"/> Default On

SETUP Tabs

Step 3. Add to Custom Apps

Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.

Custom App

Custom App	Include Tab
Platform (standard_Platform)	<input checked="" type="checkbox"/>
Sales (standard_Sales)	<input checked="" type="checkbox"/>
Service (standard_Service)	<input checked="" type="checkbox"/>
Marketing CRM Classic (standard_Marketing)	<input checked="" type="checkbox"/>
Sample Console (standard_ServiceConsole)	<input checked="" type="checkbox"/>
High Volume Customer Portal User	<input checked="" type="checkbox"/>
Authenticated Website User	<input checked="" type="checkbox"/>
App Launcher (standard_AppLauncher)	<input checked="" type="checkbox"/>
Community (standard_Community)	<input checked="" type="checkbox"/>
Site.com (standard_Sites)	<input checked="" type="checkbox"/>
Salesforce Chatter (standard_Chatter)	<input checked="" type="checkbox"/>
Content (standard_Content)	<input checked="" type="checkbox"/>
Analytics Studio (standard_Insights)	<input checked="" type="checkbox"/>
Sales Console (standard_LightningSalesConsole)	<input checked="" type="checkbox"/>
Service Console (standard_LightningService)	<input checked="" type="checkbox"/>
Sales (standard_LightningSales)	<input checked="" type="checkbox"/>
Lightning Usage App (standard_LightningInstrumentation)	<input checked="" type="checkbox"/>
Digital Experiences (standard_SalesforceCMS)	<input checked="" type="checkbox"/>

SETUP > OBJECT MANAGER Lease Agreement

Details

Description	Enable Reports
API Name <u>Lease_Agreement_c_c</u>	Track Activities
Custom	Track Field History
Singular Label Lease Agreement	Deployment Status
Plural Label Lease Agreements	Deployed
	Help Settings
	Standard salesforce.com Help Window

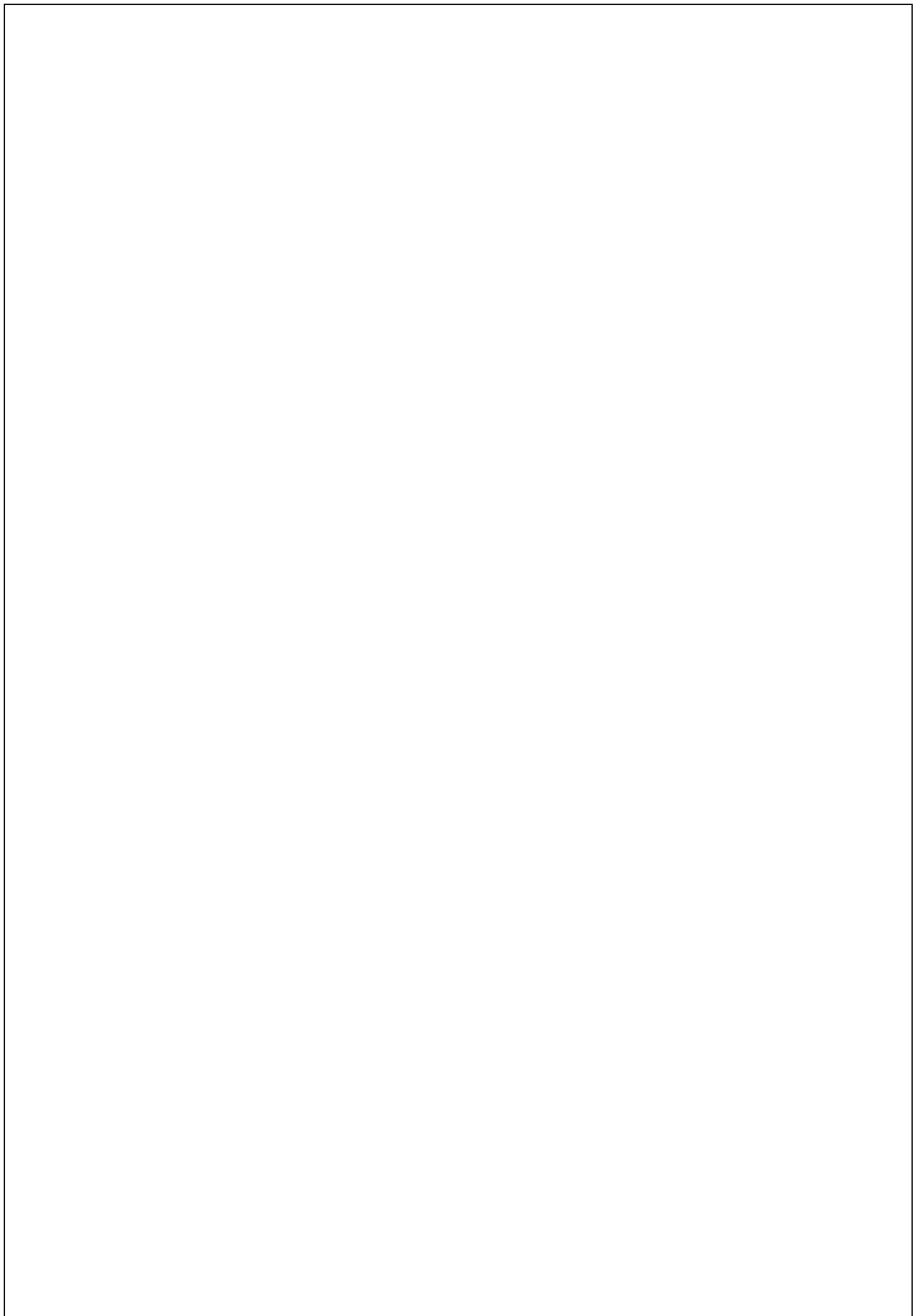
<https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000002EqjB/Details/view>

Tenant | Salesforce **Lease Agreement | Salesforce**

SETUP > OBJECT MANAGER Lease Agreement

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Lease Agreement Name	Name	Auto Number		
Owner	OwnerId	Lookup(User,Group)		



Setup Home Object Manager

Lease Agreement

Details

Fields & Relationships

- None Selected
- Auto Number
- Formula
- Roll-up Summary
- Lookup Relationship
- Master-Detail Relationship
- External Lookup Relationship

Select one of the data types below:

- A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
- A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
- A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
- Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
- Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
 - The relationship field is required on all detail records.
 - When a user edits the master record, all detail records are determined.
 - A user can create a summary record on the master record to summarize the detail records.
- Creates a relationship that links this object to another object whose data is stored outside the Salesforce org.

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- When a user edits the master record, all detail records are determined.
- A user can create a summary record on the master record to summarize the detail records.

Creates a relationship that links this object to another object whose data is stored outside the Salesforce org.

Allows users to select a true (checked) or False (unchecked) value.

Allows users to enter another currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Allows users to enter a date or pick a date from a popup calendar.

Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

Allows users to enter any number. Leading zeros are removed.

Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.

Allows users to enter any phone number. Automatically formats it as a phone number.

Allows users to select a value from a list you define.

Allows users to enter multiple values from a list you define.

https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000002EgB/FieldsAndRelationships/new

Setup Home Object Manager

Lease Agreement

Details

Fields & Relationships

New Custom Field

Step 2. Enter the details Step 2 of 4

Previous Next Cancel

Field Label

Field Name

Description

Help Text

Required Always require a value in this field in order to save a record

Auto add to custom report type Add this field to existing custom report types that contain this entity

Default Value

Use formula editor. Enclose text and picklist value API names in double quotes: '{!text}', include numbers without quotes (20), show percentages as decimal (.10), and express date/decimals in the standard format: {Today} + 7. To reference a field from a Custom Metadata Type record use: {CustomMetadataTypeRecordName.FieldName}

Previous Next Cancel

Setup Home Object Manager

Lease Agreement

Details

Fields & Relationships

New Custom Field

Step 3. Establish field-level security Step 3 of 4

Previous Next Cancel

Field Label	Start Date	Visible	Read-Only																																							
Data Type	Date	<input checked="" type="checkbox"/>	<input type="checkbox"/>																																							
Field Name	Start_Date	<input checked="" type="checkbox"/>	<input type="checkbox"/>																																							
Description		<input checked="" type="checkbox"/>	<input type="checkbox"/>																																							
Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.																																										
<table border="1"> <thead> <tr> <th>Field-Level Security for Profile</th> <th>Visible</th> <th>Read-Only</th> </tr> </thead> <tbody> <tr> <td>Analytics Cloud Integration User</td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td>Analytics Cloud Security User</td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td>Anypoint Integration</td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td>Contract Manager</td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td>Cross Org Data Proxy User</td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td>Custom Marketing Profile</td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td>Custom Sales Profile</td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td>Custom Support Profile</td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td>Einstein Agent User</td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td>Force.com - App Subscription User</td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td>Force.com - Free User</td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td>Gold Partner User</td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> </tbody> </table>				Field-Level Security for Profile	Visible	Read-Only	Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Anypoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Custom Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Custom Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Custom Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Einstein Agent User	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Force.com - App Subscription User	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Force.com - Free User	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Gold Partner User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Field-Level Security for Profile	Visible	Read-Only																																								
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>																																								
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Anypoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>																																								
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>																																								
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>																																								
Custom Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>																																								
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Force.com - App Subscription User	<input checked="" type="checkbox"/>	<input type="checkbox"/>																																								
Force.com - Free User	<input checked="" type="checkbox"/>	<input type="checkbox"/>																																								
Gold Partner User	<input checked="" type="checkbox"/>	<input type="checkbox"/>																																								

Setup > OBJECT MANAGER Lease Agreement

Lease Agreement New Custom Field

Step 4 of 4

Field Label: Start Date
Data Type: Date
Field Name: Start_Date
Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field Page Layout Name Lease Agreement Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Help for this Page

Tenant | Salesforce Lease Agreement | Salesforce

https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000002EgJB/FieldsAndRelationships/view

Search Setup

SETUP > OBJECT MANAGER Lease Agreement

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Lease Agreement Name	Name	Auto Number		
Owner	OwnerId	Lookup(User,Group)		
Start Date	Start_Date_c	Date		

https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000002EgJB/FieldsAndRelationships/new

Search Setup

SETUP > OBJECT MANAGER Lease Agreement

Fields & Relationships

- No Selected
- Auto Number
- Formula
- Roll Up Summary
- Lookup Relationship
- Master-Detail Relationship
- External Lookup Relationship
- Checkbox
- Currency
- Date
- Date/Time
- Email
- Location
- Number
- Percent
- Phone
- Picklist

Select one of the data types below:

- A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
- A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
- A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
- Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a pop-up list. The other object is the source of the values in the list.
 - The relationship field is required on all detail records.
 - The ownership and sharing of a detail record are determined by the master record.
 - When a user creates a master record, the detail records are removed.
 - You can create rolling summary fields on the master record to summarize the detail records.
 - The relationship field allows users to click on a lookup icon to select a value from a pop-up list. The master object is the source of the values in the list.
- Allows users to select a True (checked) or False (unchecked) value.
- Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
- Allows users to enter a date or time, or pick a date from a pop-up calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
- Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
- Allows users to define locations, including latitude and longitude components, and can be used to calculate distance.
- Allows users to enter any number. Leading zeros are removed.
- Allows users to enter a percentage number, for example, "10" and automatically adds the percent sign to the number.
- Allows users to enter any phone number. Automatically formats it as a phone number.
- Allows users to select a value from a list you define.
- Allows users to select multiple values from a list you define.

SETUP > OBJECT MANAGER

Lease Agreement

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

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Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

Conditional Field Formatters

New Custom Field

Step 2. Enter the details

Field Label: End Date

Field Name: End Date

Description:

Help Text:

Required: Always require a value in this field in order to save a record

Auto add to custom report type: Add this field to existing custom report types that contain this entity

Show Formula Editor

Default Value:

Use formula syntax: Enclose text and postal value API names in double quotes: ("the text"), include numbers without quotes (25), where percentages as decimals (.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: CustomMetadataType__r.getCustomValue(Field__c)

Previous | Next | Cancel

SETUP > OBJECT MANAGER

Lease Agreement

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

Conditional Field Formatters

New Custom Field

Step 4. Add to page layouts

Field Label: End Date

Field Type: Date

Field Name: End_Date

Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field | Page Layout Name: Lease Agreement Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous | Save & New | Save | Cancel

SETUP > OBJECT MANAGER

Lease Agreement

Fields & Relationships

Details: 6 items, Sorted by Field Label

FIELD LABEL FIELD NAME DATA TYPE CONTROLLING FIELD INDEXED

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
End Date	End_Date_c	Date		
Last Modified By	LastModifiedBy	Lookup(User)		
Lease Agreement Name	Name	Auto Number		
Owner	OwnerId	Lookup(User,Group)		
Start Date	Start_Date_c	Date		

Quick Find | New | Deleted Fields | Field Dependencies | Set History Tracking

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

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https://orgfarm-30278b6d61-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgK0000002EgIB/FieldsAndRelationships/new

Setup Home Object Manager Search Setup

Lease Agreement

SETUP > OBJECT MANAGER

Details

Fields & Relationships

- External Lookup Relationship
- Checkbox
- Currency
- Date
- DateTime
- Email
- Geolocation
- Number
- Percent
- Phone
- Picklist
- Picklist (Multi-Select)
- Text
- Text Area
- Text Area (Long)
- Text Area (Rich)
- Text (Encrypted) ?
- Time
- URL

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Allows users to select a True (checked) or False (unchecked) value.

Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Allows users to enter a date or pick a date from a pop-up calendar.

Allows users to enter a date and time, or pick a date from a pop-up calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.

Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

Allows users to enter any number. Leading zeros are removed.

Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.

Allows users to enter any phone number. Automatically formats it as a phone number.

Allows users to select a value from a list you define.

Allows users to select multiple values from a list you define.

Allows users to enter any combination of letters and numbers.

Allows users to enter up to 255 characters on separate lines.

Allows users to enter up to 131,072 characters on separate lines.

Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

Allows users to enter any combination of letters and numbers and store them in encrypted form.

Allows users to enter a local time. For example, '2:40 PM', '14:40', '14:40:00', and '14:40:50:600' are all valid times for this field.

Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

Next Cancel

https://orgfarm-30278b6d61-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgK0000002EgIB/FieldsAndRelationships/new

Setup Home Object Manager Search Setup

Lease Agreement

SETUP > OBJECT MANAGER

Details

Fields & Relationships

- External Lookup Relationship
- Checkbox
- Currency
- Date
- DateTime
- Email
- Geolocation
- Number
- Percent
- Phone
- Picklist
- Picklist (Multi-Select)
- Text
- Text Area
- Text Area (Long)
- Text Area (Rich)
- Text (Encrypted) ?
- Time
- URL

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Allows users to select a True (checked) or False (unchecked) value.

Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Allows users to enter a date or pick a date from a pop-up calendar.

Allows users to enter a date and time, or pick a date from a pop-up calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.

Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

Allows users to enter any number. Leading zeros are removed.

Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.

Allows users to enter any phone number. Automatically formats it as a phone number.

Allows users to select a value from a list you define.

Allows users to select multiple values from a list you define.

Allows users to enter any combination of letters and numbers.

Allows users to enter up to 255 characters on separate lines.

Allows users to enter up to 131,072 characters on separate lines.

Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

Allows users to enter any combination of letters and numbers and store them in encrypted form.

Allows users to enter a local time. For example, '2:40 PM', '14:40', '14:40:00', and '14:40:50:600' are all valid times for this field.

Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

Next Cancel

https://orgfarm-30278b6d61-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgK000002EgJB/FieldsAndRelationships/new

Setup Home Object Manager

Lease Agreement

New Custom Field

Step 2. Enter the details

Field Label: Monthly Rent

Length: 18

Decimal Places: 0

Field Name: Monthly_Rent

Description:

Help Text:

Required: Always require a value in this field in order to save a record

Auto add to custom report type: Add this field to existing custom report types that contain this entity

Default Value: Show Formula Editor

Use formula editor. Evaluate text and initial value API names in double quotes: { 'Txt_Accr' }, include numbers without a period (.) or comma (,), show percentages as decimal (0.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: \$CustomMetadataType__RecordName\$Field__c

Previous Next Cancel

https://orgfarm-30278b6d61-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgK000002EgJB/FieldsAndRelationships/new

Setup Home Object Manager

Lease Agreement

New Custom Field

Step 3. Establish field-level security

Field Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contact Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Einstein Agent User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Force.com - App Subscription User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Force.com - Free User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Gold Partner User	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Previous Next Cancel

<https://orgfarm-30278b6d61-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgK000002EgIB/fieldsAndRelationships/new>

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Lease Agreement

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New Custom Field
Step 4: Add to page layouts Step 4 of 4

Field Label: Monthly Rent
Data Type: Currency
Field Name: Monthly_Rent
Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.
To change the location of this field on the page, you will need to customize the page layout.

Add Field Page Layout Name
 Lease Agreement Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous | Save & New | Save | Cancel

<https://orgfarm-30278b6d61-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgK000002EgIB/FieldsAndRelationships/view>

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Conditional Field Formatters

Fields & Relationships 7 items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
End Date	End_Date__c	Date		
Last Modified By	LastModifiedBy	Lookup(User)		
Lease Agreement Name	Name	Auto Number		
Monthly Rent	Monthly_Rent__c	Currency(18, 0)		
Owner	OwnerId	Lookup(User,Group)		
Start Date	Start_Date__c	Date		

<https://orgfarm-30278b6d61-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgK000002EgIB/fieldsAndRelationships/new>

Setup > Object Manager
Lease Agreement

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Specify the type of information that the custom field will contain.

Data Type
 None Selected
 Auto Number
 Formula
 Roll-Up Summary
 Lookup Relationship
 Master-Detail Relationship
 External Lookup Relationship
 Checkbox
 Currency
 Date
 Email
 Geolocation

Select one of the data types below.

None Selected: A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

Auto Number: A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

Formula: A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Roll-Up Summary: Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a pop-up list. The other object is the source of the values in the list.

Lookup Relationship: Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master").

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user edits the master record, all detail records are deleted.
- You can also roll up summary fields on the master record to summarize the detail records.

Master-Detail Relationship: The relationship field allows users to click on a lookup icon to select a value from a pop-up list. The master object is the source of the values in the list.

External Lookup Relationship: Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Checkbox: Allows users to select a True (checked) or False (unchecked) value.

Currency: Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Date: Allows users to enter a date or pick a date from a pop-up calendar.

Email: Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

Geolocation: Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

None Selected: Allows users to enter any number. Leading zeros are removed.

The screenshot shows the 'Lease Agreement' setup page under 'Object Manager'. On the left, a sidebar lists various configuration options like Details, Fields & Relationships, Page Layouts, and Record Types. The main area is titled 'Lease Agreement' and shows the 'New Relationship' wizard. Step 2, 'Choose the related object', is active, displaying a list of objects: Payment, Payment Authorization, Payment Authorization Adjustment, Payment Group, Price Book, Privacy RTB Request, Problem, Problem Related Item, Process Exception, Product, Product Consumption Schedule, Promotion, Promotion Market Segment, Property, Query Editor, Queue, Quick Text, and None. A dropdown labeled 'Related To' is set to 'None'. Navigation buttons 'Previous', 'Next', and 'Cancel' are at the bottom.

The screenshot shows the 'Lease Agreement' setup page under 'Object Manager'. The sidebar and main title are identical to the previous screenshot. The main area is titled 'New Relationship' and shows Step 3 of 6: 'Enter the label and name for the lookup field'. It includes fields for 'Field Label' (Property), 'Field Name' (Property), 'Description', and 'Help Text'. Below these are sections for 'Child Relationship Name' (Lease_Agreements), 'Required' (checkbox for 'Always require a value in this field in order to save a record'), 'What to do if the lookup record is deleted?' (radio buttons for 'Clear the value of this field' and 'Don't allow deletion of the lookup record that's part of a lookup relationship'), and 'Auto add to custom report type' (checkbox for 'Add this field to existing custom report types that contain this entity'). A 'Lookup Filter' section with a note about creating a filter is also present. Navigation buttons 'Previous', 'Next', and 'Cancel' are at the bottom.

Lease Agreement

Details

Fields & Relationships

Field Label	Property	Visible	Read-Only
Field Name	Property	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Description		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Lightning Record Pages		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Buttons, Links, and Actions		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Compact Layouts		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Field Sets		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Object Limits		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Record Types		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Related Lookup Filters		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Restriction Rules		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Scoping Rules		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Object Access		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Triggers		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Flow Triggers		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Validation Rules		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Conditional Field Formations		<input checked="" type="checkbox"/>	<input type="checkbox"/>

Lease Agreement

New Relationship

Help for this Page 

Step 6. Add custom related lists Step 6 of 6

Previous Save & New Save Cancel

Field Label Property
Data Type Lookup
Field Name Property
Description

Specify the title that the related list will have in all of the layouts associated with the parent.
Related List Label Lease Agreements

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.
To change the location of this field on the page, you will need to customize the page layout.

Add Related List Page Layout Name
 Property Layout

Append related list to users' existing personal customizations

Previous Save & New Save Cancel

Lease Agreement

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

Conditional Field Formations

Step 1. Choose the field type Step 1

Next | Cancel

Specify the type of information that the custom field will contain.

Data Type

- None Selected
- Auto Number
- Formula
- Roll Up Summary
- Lookup Relationship
- Master Detail Relationship
- External Lookup Relationship
- Checkbox
- Currency
- Date
- Date/Time
- Email
- File
- Integer
- Percent
- Text
- URL

Select one of the data types below:

Lookup Relationship

A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a pop-up list. The other object is the source of the values in the list.

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- When a user creates a new master record, it automatically creates the detail records.

The relationship field allows users to click on a lookup icon to select a value from a pop-up list. The master object is the source of the values in the list.

Master Detail Relationship

Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- When a user creates a new master record, it automatically creates the detail records.

External Lookup Relationship

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Allows users to select a True (checked) or False (unchecked) value.

Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Allows users to enter a date or pick a date from a pop-up calendar.

Allows users to enter a date and time, or pick a date from a pop-up calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.

Allows users to enter an email address, which is validated to ensure proper format. If this field is selected for a contact or lead, users can choose the address when clicking Blend an Email Note that custom

https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000002EgIB/FieldsAndRelationships/new

Setup Home Object Manager Search Setup Help for this Page

Lease Agreement

Lease Agreement New Relationship Step 2 of 6

Step 2. Choose the related object

Select the other object to which this object is related.

Related To: Tenant

Previous Next Cancel

Details Fields & Relationships Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Record Types Related Lookup Filters Restriction Rules Scoping Rules Object Access Triggers Flow Triggers Validation Rules Conditional Field Formatters

https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000002EgIB/FieldsAndRelationships/new

Setup Home Object Manager Search Setup Help for this Page

Lease Agreement

Lease Agreement New Relationship Step 3 of 6

Step 3. Enter the label and name for the lookup field

Field Label: Tenant

Field Name: Tenant

Description:

Help Text:

Child Relationship Name: Lease_Agreements

Required: Always require a value in this field in order to save a record. Clear the value of this field. You can't choose this option if you make this field required.

What to do if the lookup record is deleted?

Auto add to custom report type: Add this field to existing custom report types that contain this entity.

Lookup Filter

Optional, create a filter to limit the records available to users in the lookup field. Tell me more! Show Filter Settings

Details Fields & Relationships Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Record Types Related Lookup Filters Restriction Rules Scoping Rules Object Access Triggers Flow Triggers Validation Rules Conditional Field Formatters

https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000002EgIB/FieldsAndRelationships/new

Setup Home Object Manager

Lease Agreement

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

Conditional Field Formulation

Field Label: Tenant
Data Type: Lookup
Field Name: Tenant
Description:

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Einstein Agent User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Force.com - App Subscription User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Force.com - Free User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Gold Partner User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Identity User	<input type="checkbox"/>	<input type="checkbox"/>
Marketing User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Minimum Access - API Only Integrations	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Minimum Access - Salesforce	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Previous Next Cancel

https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000002EgIB/FieldsAndRelationships/new

Setup Home Object Manager

Lease Agreement

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

New Relationship

Step 8. Add reference field to Page Layouts Step 8 of 6

Help for this Page

Field Label: Tenant
Data Type: Lookup
Field Name: Tenant
Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field Page Layout Name

Lease Agreement Layout

Previous Next Cancel

https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000002EgIB/FieldsAndRelationships/new

Setup Home Object Manager

Lease Agreement

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Triggers

New Relationship

Step 8. Add custom related lists Step 8 of 6

Help for this Page

Field Label: Tenant
Data Type: Lookup
Field Name: Tenant
Description:

Specify the title that the related list will have in all of the layouts associated with the parent.

Related List Label: Lease Agreements

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Related List Page Layout Name

Tenant Layout

Append related list to users' existing personal customizations

Previous Save & New Save Cancel

The screenshot shows the Salesforce Object Manager interface for the 'Lease Agreement' object. On the left, a sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, and Lightning Record Pages. The main content area displays the 'Fields & Relationships' section, which lists nine fields: Created By, End Date, Last Modified By, Lease Agreement Name, Monthly Rent, Owner, Property, Start Date, and Tenant. Each field is defined by its label, name, data type (e.g., Lookup(User), Date, Auto Number, Currency(18,0)), controlling field, and indexed status.

The screenshot shows the 'New Custom Object' setup page. At the top, it says 'SETUP New Custom Object'. Below that, the 'Custom Object Definition Edit' section has tabs for 'Save', 'Save & New', and 'Cancel'. It includes fields for 'Label' (Payment) and 'Plural Label' (Payments). A note indicates that the object name is used via the API, with 'Object Name' set to 'Payment_c'. There's also a 'Description' text area, 'Context-Sensitive Help Setting' (with options for standard help or Visualforce), and a 'Content Name' dropdown set to 'None'. The bottom section, 'Enter Record Name Label and Format', specifies 'Record Name' as 'Payment Name' and 'Data Type' as 'Auto Number'. A warning message at the bottom states: 'Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.'

<https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3FretURL%3D%252F...>

New Custom Object Tab

Step 1. Enter the Details

Choose the custom object for this new custom tab. Fill in other details.

New Custom Object Tab

Object: Payment

Tab Style: Blank

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link: None

Description:

Next Cancel

<https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000002Ejgr/Details/view>

SETUP > OBJECT MANAGER

Payment

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

API Name: Payment_C__c

Singular Label: Payment

Plural Label: Payments

Enable Reports

Track Activities

Track Field History

Deployment Status: Deployed

Help Settings: Standard salesforce.com Help Window

Edit Delete

SETUP > OBJECT MANAGER
Payment

Fields & Relationships
4 Items. Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Payment Name	Name	Auto Number		✓

Conditional Field Formattings

https://orgfarm-30278bb6d1-dev-ed.lightning.force.com/gK000002Ejr/FieldsAndRelationships/new

Business Units Product Guest User Anomaly Event Store Idea Incident Incident Related Item Individual Inventory Reservation Invoice Line Lead Lease Agreement Legal Entity Location Location Group Location Shipping Carrier Method Login Anomaly Event Store Macro Messaging Session Messaging User Step 2 Help for this Page

Setup Home Object Manager

SETUP > OBJECT MANAGER
Payment

Fields & Relationships

New Relationship Step 2. Choose the related object

Select the other object to which this object is related

Related To: Lease Agreement

Step 2 Previous Next Cancel

Search Setup

Help for this Page

Step 4 of 6 Previous Next Cancel

Establish field-level security for reference field

Field Label: Lease Agreement
Data Type: Lookup
Field Name: Lease_Agreement
Description:

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
AnyPoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom - Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom - Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom - Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Einstein Agent User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Force.com - App Subscription User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Force.com - Free User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Gold Partner User	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Setup > Object Manager > Payment

New Relationship

Step 6 of 6

Field Label: Lease Agreement
Data Type: Lookup
Field Name: Lease_Agreement
Description:

Related List Label: Payments

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Related List: Page Layout Name: Lease Agreement Layout
Append related list to users' existing personal customizations

Save & Next

Setup > Object Manager > Payment

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		✓
Last Modified By	LastModifiedById	Lookup(User)		✓
Lease Agreement	Lease_Agreement_c	Lookup(Lease Agreement)		✓
Owner	OwnerId	Lookup(User,Group)		✓
Payment Name	Name	Auto Number		✓

Setup > Object Manager > Payment

Fields & Relationships

External Lookup Relationship

The relationship field allows users to click on a lookup icon to select a value from a pop-up list. The master object is the source of the values in the list.

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

- External Lookup Relationship
- Currency
- Date
- DateTime
- Email
- Geolocation
- Number
- Percent
- Phone
- Picklist
- Picklist (Multi-Select)
- Text
- Text Area
- Text Area (Long)
- Text Area (Rich)
- Text (Encrypted)
- Time
- URL

Next Cancel

SETUP > OBJECT MANAGER
Payment

New Custom Field

Step 2. Enter the details Step 2 of 4

Field Label: **Amount**

Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".

Length: **18** Number of digits to the left of the decimal point

Decimal Places: **0** Number of digits to the right of the decimal point

Field Name: **Amount**

Description:

Help Text:

Required: Always require a value in this field in order to save a record

Auto add to custom report type: Add this field to existing custom report types that contain this entity.

Default Value: [Show Formula Editor](#)

Use formula editor. Formula text and resulting value of the field in quotes: "This is my currency field". Inside quotes, include numbers without quotes. If you want to use a formula, make sure the formula is valid. For example, if you want to add 10 to a value, use =A+10. If you want to reference a field from a Custom Metadata type record, use \$CustomMetadataType__Name__Value

Previous Next Cancel

https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK0000002ejr/FieldsAndRelationships/new

Setup Home Object Manager

SETUP > OBJECT MANAGER
Payment

New Custom Field

Step 4. Add to page layouts Step 4 of 4

Field Label: **Amount**

Data Type: **Currency**

Field Name: **Amount**

Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

Add Field Page Layout Name Payment Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous Save & New Save Cancel

The screenshot shows the Salesforce Object Manager interface for the 'Payment' object. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main content area displays the 'Fields & Relationships' section with a table showing six fields: Amount, Created By, Last Modified By, Lease Agreement, Owner, and Payment Name. The table includes columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status.

GROUP THEM TOGETHER INTO ONE CUSTOM APP

The screenshot shows the Salesforce Setup Home page. The left sidebar has a search bar and lists categories such as Data, Apps (with sub-options like App Manager, AppExchange Marketplace, and Connected Apps), External Client Apps, Lightning Bolt, Mobile Apps, and Mobile Builders. The main content area features a 'Setup Home' banner with four cards: Data Cloud, Get Started with Einstein Bots, Mobile Publisher, and Join the Trailblazer Community. Below the banner is a 'Most Recently Used' section listing items like Amount, Lease Agreement, Payments, Payment, and Tenant, categorized by Type and Object.

https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

App Name	Developer Name	Description	Last Modified	Type
All Tabs	AllTabSet	Build CRM Analytics dashboards and apps.	7/9/2025, 10:08 PM	Classic
Analytics Studio	Insights	Automate business processes and repetitive tasks.	7/9/2025, 10:08 PM	Classic
App Launcher	AppLauncher	Discover and manage business solutions designed for your industry.	7/9/2025, 10:08 PM	Classic
Approvals	Approvals	Manage approvals and approval flows	7/9/2025, 10:08 PM	Lightning
Automation	FlowApp	Discover new customer service capabilities.	7/9/2025, 10:17 PM	Lightning
Bolt Solutions	LightningBolt	Create and manage queues for your business.	7/9/2025, 10:08 PM	Lightning
Community	Community	The fundamental Lightning Platform	7/9/2025, 10:08 PM	Classic
Content	Content	Manage content and media for all of your sites.	7/9/2025, 10:08 PM	Classic
Data Cloud	Audience360	Build a thorough and complete understanding of your customers.	7/9/2025, 10:08 PM	Lightning
Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	7/9/2025, 10:08 PM	Lightning
Digital Experiences	SalesforceCMS	Discover new customer service capabilities.	7/9/2025, 10:08 PM	Lightning
How We Roll Maintenance	How_We_Roll_Maintenance	How We Roll Maintenance	8/11/2025, 12:37 AM	Lightning
Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	7/9/2025, 10:08 PM	Lightning
Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	7/9/2025, 10:08 PM	Classic
My Service Journey	MSJapp	Discover new customer service capabilities.	7/9/2025, 10:08 PM	Lightning
Platform	Platform	Create and manage queues for your business.	7/9/2025, 10:08 PM	Classic
Queue Management	QueueManagement	The world's most popular sales force automation (SFA) solution	7/9/2025, 10:08 PM	Lightning

https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

New Lightning App

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

App Details

*App Name: Lease Management

*Developer Name: Lease_Management

Description: App to manage properties, tenants, leases, and payments.

App Branding

Image: Upload

Primary Color Hex Value: #0070D2

Org Theme Options: Use the app's image and color instead of the org's custom theme

App Launcher Preview

LM Lease Management - App to manage properties, tenants, leases, and payments.

Next

New Lightning App

App Options

Navigation and Form Factor

***Navigation Style**

- Standard navigation
- Console navigation

***Supported Form Factors**

- Desktop and phone
- Desktop
- Phone

Setup and Personalization

Setup Experience

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

App Personalization Settings

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

Back Next

New Lightning App

Available Items

Type to filter list...

- Partner Unsold Inventory Ledgers
- Party Consent
- Paused Flows
- Payment Authorization Adjustments
- Payment Authorizations
- Payment Gateway Logs
- Payment Gateways
- Payment Line Invoices
- Payments

Selected Items

- Properties
- Tenants
- Lease Agreements
- Payments

Back Next

https://orgfarm-30278b6d61-dev-ed.lightning.force.com/lightning/setup/NavigationMenus/home

Search Setup

Setup Home Object Manager

New Lightning App

Available Profiles

Type to filter list...

- Minimum Access - Salesforce
- Partner App Subscription User
- Partner Community Login User
- Partner Community User
- Read Only
- Salesforce API Only System Integrations
- Silver Partner User
- Solution Manager
- Standard Platform User
- Standard User

Selected Profiles

- System Administrator

Save & Finish

Item	Description	Created	Modified	Platform	Version
15. my service journey	Discover new customer service capabilities.	7/9/2025, 10:08 PM	7/9/2025, 10:08 PM	Lightning	✓
16. Platform	The fundamental Lightning Platform	7/9/2025, 10:08 PM	7/9/2025, 10:08 PM	Classic	✓
17. Queue Management	Create and manage queues for your business.	7/9/2025, 10:08 PM	7/9/2025, 10:08 PM	Lightning	✓
18. Sales	The world's most popular sales force automation (SFA) solution	7/9/2025, 10:08 PM	7/9/2025, 10:08 PM	Classic	✓

Screenshot of the Lightning Experience App Manager setup page.

The left sidebar shows the navigation menu under "Salesforce Mobile App".

- Setup**
- Home**
- Object Manager**
- Q app**
- Salesforce Mobile App**
 - Data**
 - Mass Transfer Approval Requests
 - Apps**
 - App Manager** (selected)
 - AppExchange Marketplace
 - Connected Apps**
 - Connected Apps OAuth Usage
 - Manage Connected Apps
 - External Client Apps**
 - External Client App Manager
 - OAuth Usage
 - Settings
 - Lightning Bolt**
 - Flow Category
 - Lightning Bolt Solutions
 - Mobile Apps**
 - Mobile Builder for the Seller-Focused
 - Salesforce

The main content area displays the "Lightning Experience App Manager" table:

App Name	Developer Name	Description	Last Modified Date	App Type	Visible in ...
All Tabs	AllTabSet	Build CRM Analytics dashboards and apps	7/9/2025, 10:08 PM	Classic	✓
Analytics Studio	Insights	Build CRM Analytics dashboards and apps	7/9/2025, 10:08 PM	Classic	✓
App Launcher	AppLauncher	App Launcher tabs	7/9/2025, 10:08 PM	Classic	✓
Approvals	Approvals	Manage approvals and approval flows	7/9/2025, 10:08 PM	Lightning	✓
Automation	FlowsApp	Automate business processes and repetitive tasks.	7/9/2025, 10:17 PM	Lightning	✓
Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	7/9/2025, 10:08 PM	Lightning	✓
Community	Community	Salesforce CRM Communities	7/9/2025, 10:08 PM	Classic	✓
Content	Content	Salesforce CRM Content	7/9/2025, 10:08 PM	Classic	✓
Data Cloud	Audience360	Build a thorough and complete understanding of your customers.	7/9/2025, 10:08 PM	Lightning	✓
Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	7/9/2025, 10:08 PM	Lightning	✓
Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	7/9/2025, 10:08 PM	Lightning	✓
How We Roll Maintenance	How_We_Roll_Maintenance	How We Roll Maintenance	8/11/2025, 12:37 AM	Lightning	✓
Lease Management	Lease_Management	App to manage properties, tenants, leases, and payments.	9/14/2025, 2:51 AM	Lightning	✓
Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	7/9/2025, 10:08 PM	Lightning	✓
Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	7/9/2025, 10:08 PM	Classic	✓
My Service Journey	MSIApp	Discover new customer service capabilities.	7/9/2025, 10:08 PM	Lightning	✓
Platform	Platform	The fundamental Lightning Platform	7/9/2025, 10:08 PM	Classic	✓
Queue Management	QueueManagement	Create and manage queues for your business.	7/9/2025, 10:08 PM	Lightning	✓

READY TO ADD DATA:

Screenshot of the Lease Management list view page.

The top navigation bar shows the current tab: **Tenant | Salesforce**.

The main content area displays the "Recently Viewed" section of the Lease Management list view.

The list view table has the following columns:

New	Import	Change Owner	Assign Label
<input type="button" value="New"/>	<input type="button" value="Import"/>	<input type="button" value="Change Owner"/>	<input type="button" value="Assign Label"/>
<input type="text" value="Search this list..."/> <input type="button" value="Filter"/> <input type="button" value="Reset"/> <input type="button" value="Print"/> <input type="button" value="Edit"/>			

The message "Nothing to see here" is displayed, indicating there are no records in the list.

The screenshot shows a 'New Property' dialog box. At the top, there's a search bar and several action buttons: 'New', 'Import', 'Change Owner', and 'Assign Label'. Below the search bar, there's a 'Search this list...' input field and some filter icons. The main form has a title 'New Property' and a note '* = Required Information'. It contains a single required field: 'Property Name' (set to 'Sunrise Apartments') and an 'Owner' field (set to 'Asma Ahmed.A'). At the bottom of the dialog are 'Cancel', 'Save & New', and 'Save' buttons.

This screenshot shows the 'Sunrise Apartments' property record. The left sidebar lists 'Related' and 'Details' tabs, with 'Details' selected. The main area displays basic information: 'Property Name' (Sunrise Apartments), 'Owner' (Asma Ahmed.A), and 'Created By' (Asma Ahmed.A, 9/14/2025, 3:20 AM). To the right, there's an 'Activity' section with a toolbar, filters, and a message stating 'No activities to show.' Below it is an 'Upcoming & Overdue' section with a similar message.

This screenshot shows a 'New Tenant' dialog box. It has a 'Information' section with required fields: 'Tenant Name' (John Doe), 'Phone' (555-123-4567), and 'Email' (johndoe@email.com). The dialog includes standard buttons at the bottom: 'Cancel', 'Save & New', and 'Save'. The background shows the 'Sunrise Apartments' property detail view.

Lease Management Properties Tenants

Tenant John Doe

Related Details

Tenant Name: John Doe Owner: Asma Ahamed.A

Phone: 555-123-4567 Email: john.doe@email.com

Created By: Asma Ahamed.A - 9/14/2025, 3:27 AM Last Modified By: Asma Ahamed.A - 9/14/2025, 3:27 AM

Activity

Filters: All time • All activities • All types Refresh • Expand All • View All

Upcoming & Overdue

No activities to show. Get started by sending an email, scheduling a task, and more.

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

Lease Management Properties Tenants

App Launcher Q: leaf

Apps Lease Management

Items Lease Agreements

View All Owner: Asma Ahamed.A

Lease Agreements: 555-123-4567

Email: john.doe@email.com

Created By: Asma Ahamed.A - 9/14/2025, 3:27 AM Last Modified By: Asma Ahamed.A - 9/14/2025, 3:27 AM

Activity

Filters: All time • All activities • All types Refresh • Expand All • View All

Upcoming & Overdue

No activities to show. Get started by sending an email, scheduling a task, and more.

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

Lease Management Properties Tenants *Lease Agreements

Lease Agreements Recently Viewed

0 items • Updated a minute ago

New Import Change Owner Assign Label



Nothing to see here

There's nothing in your list yet. Try adding a new record.

The screenshot shows a "New Lease Agreement" form within a "Lease Management" application. The form includes fields for Start Date (9/14/2025), End Date (9/15/2026), Monthly Rent (\$1,200), Property (Sunrise Apartments), Tenant (John Doe), and Owner (Atma Ahamed.A). The "Owner" field is marked as required information. The top navigation bar shows various browser tabs and a settings icon.

The screenshot shows a Salesforce interface for a 'Lease Agreement' record. The URL in the browser is https://orgfarm-30278bb6d61-dev-ed.develop.lightning.force.com/lightning/r/Lease_Agreement_c_c/a0BgK0000098y0DQAO/view. The page title is 'Lease Management'. The main content area displays the details of a lease agreement named 'L-0001'. The 'Details' tab is selected. The record includes fields for Lease Agreement Name (L-0001), Owner (Asma Ahmed A), Start Date (9/14/2025), End Date (9/15/2026), Monthly Rent (\$1,200), Property (Sunrise Apartments), Tenant (John Doe), Created By (Asma Ahmed A, 9/14/2025, 4:29 AM), and Last Modified By (Asma Ahmed A, 9/14/2025, 4:29 AM). Navigation tabs include 'Properties' and 'Tenants'. Buttons for 'New Contact', 'Edit', and 'New Opportunity' are visible.

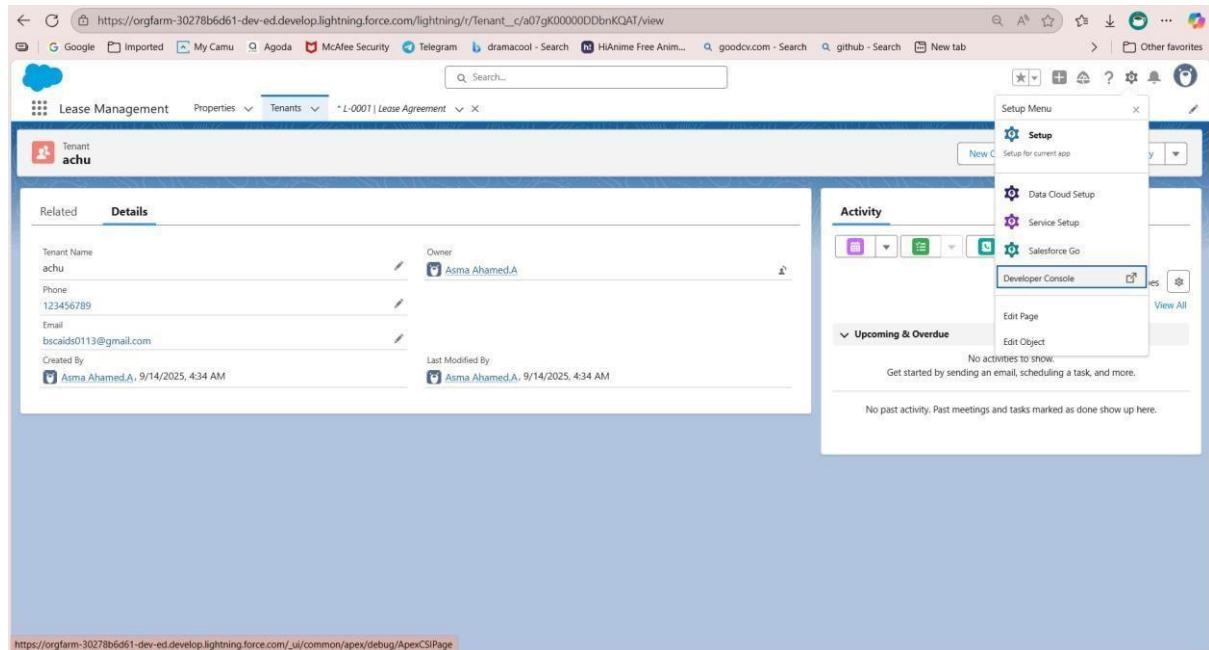
The screenshot shows a Microsoft Dynamics 365 Lease Management tenant record for a tenant named "achu". The tenant details include:

- Tenant Name: achu
- Phone: 123456789
- Email: bscalids0113@gmail.com
- Created By: Asma Ahamed,A (9/14/2025, 4:34 AM)
- Last Modified By: Asma Ahamed,A (9/14/2025, 4:34 AM)
- Owner: Asma Ahamed,A

A green success message at the top right states: "Tenant 'achu' was created." The interface includes a search bar, navigation tabs (Properties, Tenants), and a ribbon with buttons for New Contact, Edit, and New Opportunity.

"achu" was created, which means the trigger did not run. This happens because the code might be missing or has a small mistake

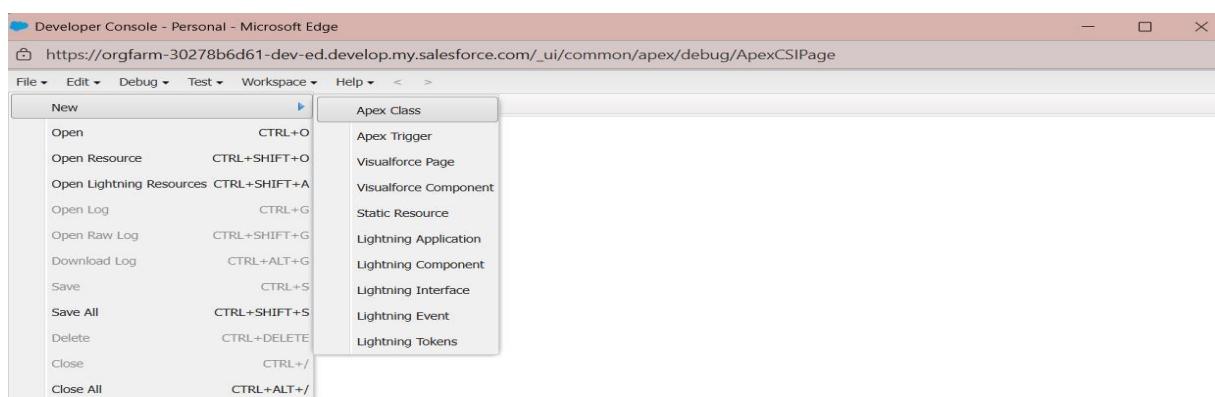
Create the Class (The Brain):



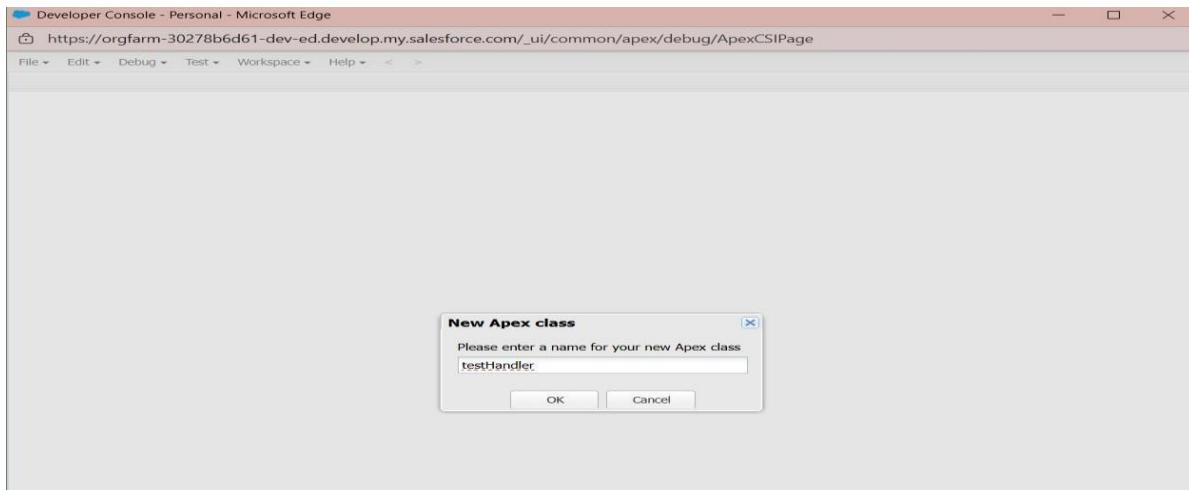
The screenshot shows the Salesforce Lightning interface for a tenant named "achu". The "Details" tab is selected, displaying the following information:

- Tenant Name: achu
- Phone: 123456789
- Email: bscids0113@gmail.com
- Created By: Asma Ahamed,A
- Last Modified By: Asma Ahamed,A, 9/14/2025, 4:34 AM

The "Activity" section is visible on the right, showing a "Setup" menu with options like "Setup for current app", "Data Cloud Setup", "Service Setup", and "Developer Console". The "Upcoming & Overdue" section indicates "No past activity. Past meetings and tasks marked as done show up here."



The screenshot shows the Salesforce Developer Console interface. A context menu is open under the "New" option in the left sidebar, with "Apex Class" selected. Other options in the menu include "Apex Trigger", "Visualforce Page", "Visualforce Component", "Static Resource", "Lightning Application", "Lightning Component", "Lightning Interface", "Lightning Event", and "Lightning Tokens".



```
public class testHandler {    public static void preventDuplicateTenants(List<Tenant__c> newList) {  
  
    // Get all Property IDs that currently have an ACTIVE Tenant      Set<Id> occupiedPropertyIds =  
    new Set<Id>();      for (Tenant__c activeTenant : [SELECT Id, Property__c  
                                              FROM Tenant__c  
                                              WHERE Property__c != null  
                                              AND Active__c = true])  
    {  
        occupiedPropertyIds.add(activeTenant.Property__c);  
  
    }  
  
    // Check new tenants against the list of occupied properties      for (Tenant__c newTenant : newList)  
    {
```

```

        if      (newTenant.Property__c      !=      null      &&      newTenant.Active__c &&
occupiedPropertyIds.contains(newTenant.Property__c)) {      newTenantaddError('A Property
can only have one active Tenant. Please select a vacant
property.');
    }

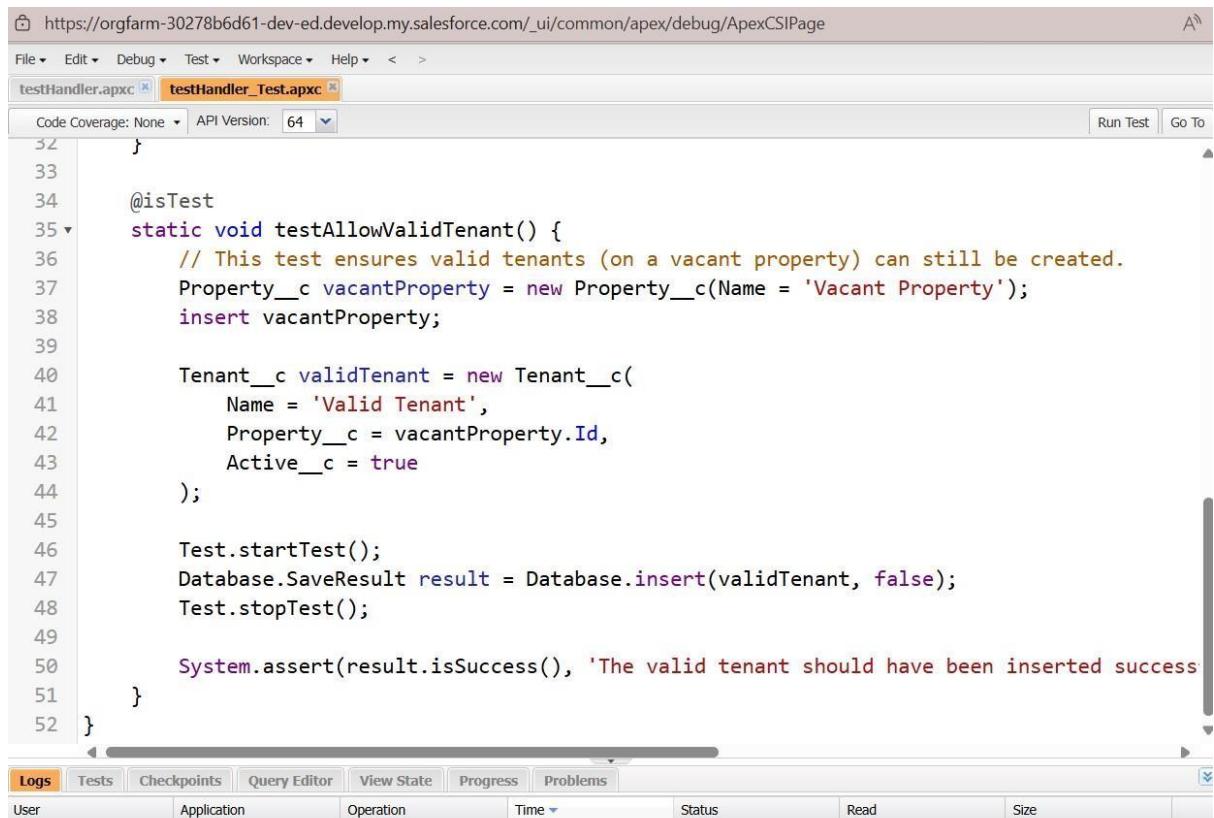
}
}

}

```

Save the code ctrl+S or file->save

If any error found means clear it and save it again



```

https://orgfarm-30278b6d61-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage
File Edit Debug Test Workspace Help < >
testHandler.apxc testHandler_Test.apxc
Code Coverage: None API Version: 64 Run Test Go To
32 }
33
34 @isTest
35 static void testAllowValidTenant() {
36     // This test ensures valid tenants (on a vacant property) can still be created.
37     Property__c vacantProperty = new Property__c(Name = 'Vacant Property');
38     insert vacantProperty;
39
40     Tenant__c validTenant = new Tenant__c(
41         Name = 'Valid Tenant',
42         Property__c = vacantProperty.Id,
43         Active__c = true
44     );
45
46     Test.startTest();
47     Database.SaveResult result = Database.insert(validTenant, false);
48     Test.stopTest();
49
50     System.assert(result.isSuccess(), 'The valid tenant should have been inserted success
51 }
52 }
```

@isTest public class testHandler_Test {

```

@isTest static void testPreventDuplicateTenants() {
// SETUP: Create a test property and an active tenant

```

```
Property__c testProperty = new Property__c(Name = 'Test Property');

insert testProperty;

Tenant__c existingTenant = new Tenant__c(
    Name = 'Existing Tenant',
    Property__c = testProperty.Id,
    Active__c = true
);

insert existingTenant;

// TEST: Try to add a second active tenant to the same property

Tenant__c duplicateTenant = new Tenant__c(
    Name = 'Duplicate Tenant',
    Property__c = testProperty.Id,
    Active__c = true
);

Test.startTest();

try {
    insert duplicateTenant;
    System.assert(false, 'Expected an error but none was thrown.');
} catch (DmlException e) {
    System.assert(e.getMessage().contains('A Property can only have one active Tenant'), 'Error
message did not match: ' + e.getMessage());
}
```

```
Test.stopTest();

}

@isTest static void testAllowValidTenant() {

    // This test ensures valid tenants (on a vacant property) can still be created.      Property__c
vacantProperty = new Property__c(Name = 'Vacant Property');      insert vacantProperty;

    Tenant__c validTenant = new Tenant__c(
        Name = 'Valid Tenant',
        Property__c = vacantProperty.Id,
        Active__c = true
    );

    Test.startTest();

    Database.SaveResult result = Database.insert(validTenant, false);

    Test.stopTest();

    System.assert(result.isSuccess(), 'The valid tenant should have been inserted successfully but was
not. Error: ' + result.getErrors()[0].getMessage());
}

}
```

Name it testHandler_Test

Copy and paste the entire code above

Save the file

Run the tests (Tests tab → New Run → select testHandler_Test → Run)

Developer Console - Personal - Microsoft Edge

https://orgfarm-30278b6d61-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage

File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < >

testHandler.apxc t Always Run Asynchronously

Code Coverage: None

New Run

32 }
33
34 @isTest
35 **stat** idTenant() {
36 valid tenants (on a vacant property) can still be created.
37 Property = new Property__c(Name = 'Vacant Property');
38 y;
39
40 t = new Tenant__c(
41 nant',
42 cantProperty.Id,
43
44 Clear Test Data
45
46 Test.startTest();
47 Database.SaveResult result = Database.insert(validTenant, false);
48 Test.stopTest();
49
50 System.assert(result.isSuccess(), 'The valid tenant should have been inserted successfully');
51 }
52 }

Run Test Go To

Logs Tests Checkpoints Query Editor View State Progress Problems

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

testHandler.apxc testHandler_Test.apxc

Code Coverage: None API Version: 64

```

32 }
33
34 @isTest
35 static void testAllowValidTenant() {
36     // This test ensures valid tenants (on a vacant property) can still be created.
37     Property__c vacantProperty = new Property__c(Name = 'Vacant Property');
38     insert vacantProperty;
39
40     Tenant__c validTenant = new Tenant__c(
41         Name = 'Valid Tenant',
42         Property__c = vacantProperty.Id,
43         Active__c = true
44     );
45
46     Test.startTest();
47     Database.SaveResult result = Test.stopTest();
48
49     System.assert(result.isSuccess(), 'The valid tenant should have been inserted successfully');
50 }
51
52 }
```

Select Tests

Test Classes	testHandler_Test Tests	Selected Tests
Name	<input checked="" type="checkbox"/> testAllowValidTenant	<input checked="" type="checkbox"/> Name
CreateDefaultDataTest	<input checked="" type="checkbox"/> testPreventDuplicateTe...	<input checked="" type="checkbox"/> testHandler_Test
WarehouseCalloutServiceTest		All Methods Selected
testHandler_Test		

Add Selected Remove Selected

Filter test classes (* = any) [My Namespace] Settings Run

Logs Tests Checkpoints Query Editor View State Progress Problems

User Application Operation Time Status Read Size

https://orgfarm-30278b6d1-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage

File Edit Debug Test Workspace Help < >

testHandler.apxc testHandler_Test.apxc

Code Coverage: None API Version: 64

```

32 }
33
34 @isTest
35 static void testAllowValidTenant() {
36     // This test ensures valid tenants (on a vacant property) can still be created.
37     Property__c vacantProperty = new Property__c(Name = 'Vacant Property');
38     insert vacantProperty;
39
40     Tenant__c validTenant = new Tenant__c(
41         Name = 'Valid Tenant',
42         Property__c = vacantProperty.Id,
43         Active__c = true
44     );
45
46     Test.startTest();
47     Database.SaveResult result = Test.stopTest();
48
49     System.assert(result.isSuccess(), 'The valid tenant should have been inserted successfully');
50 }
51
52 }
```

Running tests synchronously...

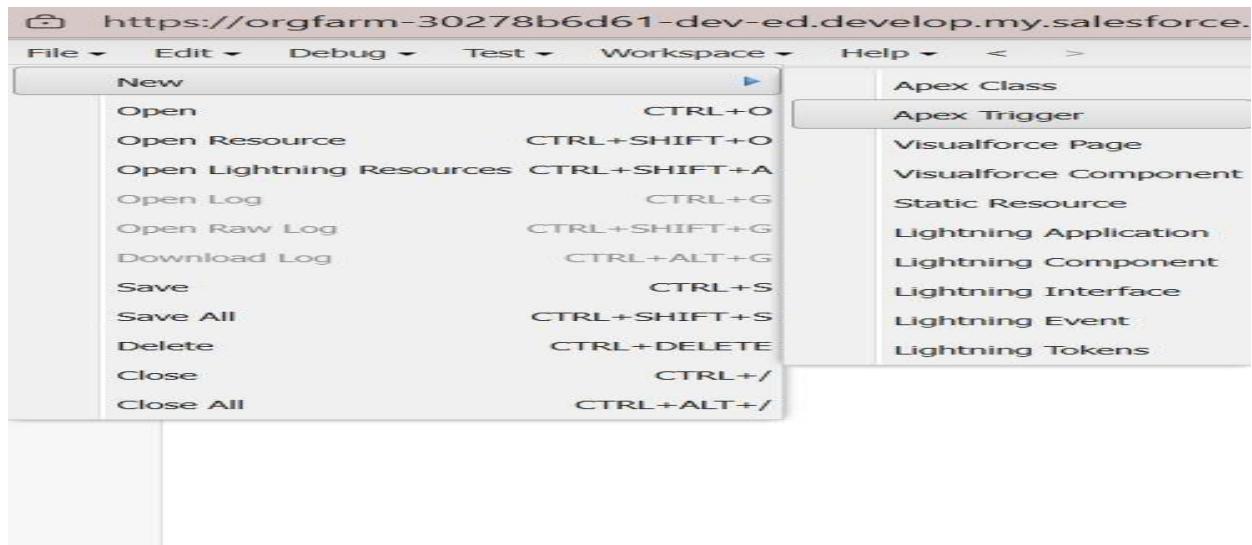
Success

Logs Tests Checkpoints Query Editor View State Progress Problems

User Application Operation Time Status Read Size

Asma Ahamed.A Unknown /services/data/v64.0/to... 14/9/2025, 7:57:04 pm Assertion Failed: Expect... Unread 11.5 KB

Create the Apex Trigger



Trigger: Name it TenantTrigger.

Select the Object: Choose Tenant__c from the dropdown.

A screenshot of the Salesforce Developer Console code editor. The title bar says 'Developer Console - Personal - Microsoft Edge'. The URL in the address bar is https://orgfarm-30278b6d61-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage. The code editor window has a tab labeled 'TenantTrigger.apxt *'. At the top of the editor are buttons for 'Code Coverage: None' and 'API Version: 64'. The code itself is a single-line trigger definition:

```
trigger TenantTrigger on Tenant__c (before insert, before update) {  
    testHandler.preventDuplicateTenants(Trigger.new);  
}
```

```
trigger TenantTrigger on Tenant__c (before insert, before update) {  
    testHandler.preventDuplicateTenants(Trigger.new);  
}
```

We have successfully created and saved the trigger!

Leave request

SETUP **New Custom Object**

New Custom Object

Help for this Page

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)

Custom Object Definition Edit

Custom Object Information ! Required Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label	<input type="text" value="Leave rejected"/>	Example: Account
Plural Label	<input type="text" value="Leave Requests"/>	Example: Accounts

Starts with vowel sound

The Object Name is used when referencing the object via the API.

Object Name	<input type="text" value="Leave_rejected"/>	Example: Account
-------------	---	------------------

Description

Context-Sensitive Help Setting Open the standard Salesforce.com Help & Training window Open a window using a Visualforce page

SETUP > OBJECT MANAGER

Leave Request

Details	Details
Fields & Relationships	Description
Page Layouts	API Name
Lightning Record Pages	Leave_Request__c
Buttons, Links, and Actions	Custom
Compact Layouts	✓
Field Sets	Singular Label
Object Limits	Leave Request
Record Types	Plural Label
Related Lookup Filters	Leave Requests
Restriction Rules	Enable Reports
Scoping Rules	Track Activities
Object Access	Track Field History
Triggers	Deployment Status
Flow Triggers	Deployed
	Help Settings
	Standard salesforce.com Help Window

Setup Home Object Manager

SETUP > OBJECT MANAGER
Leave Request

Details

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Restriction Rules
- Scoping Rules
- Object Access

Leave Request
New Custom Field

Step 2. Enter the details Step 2 of 4

Field Label Help for this Page

Values Use global picklist value set
 Enter values, with each value separated by a new line

Pending
Approved
Rejected

Display values alphabetically, not in the order entered
 Use first value as default value
 Restrict picklist to the values defined in the value set

Field Name

Previous Next Cancel

SETUP > OBJECT MANAGER
Leave Request

Details

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Restriction Rules
- Scoping Rules

Leave Request
New Custom Field

Step 4. Add to page layouts Step 4 of 4

Field Label Status
Data Type Picklist
Field Name Status
Description

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field
 Leave Request Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous Save & New Save Cancel

Leave Request

- Details
- Fields & Relationships**
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Restriction Rules
- Scopina Rules

Leave Request
New Custom Field

Help for this Page

Step 4. Add to page layouts**Step 4 of 4**[Previous](#) [Save & New](#) [Save](#) [Cancel](#)Field Label **Status**Data Type **Picklist**Field Name **Status**

Description

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

<input checked="" type="checkbox"/> Add Field	Page Layout Name
<input checked="" type="checkbox"/>	Leave Request Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

[Previous](#) [Save & New](#) [Save](#) [Cancel](#)**Leave Request**

- Details
- Fields & Relationships**
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FILED	INDEX
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Leave Request Name	Name	Text(80)	✓	
Owner	OwnerId	Lookup(User,Group)	✓	
Status	Status_c	Picklist		

Leave Request**New Custom Field**

Help for this Page

Step 2. Enter the details**Step 2 of 4**[Previous](#) [Next](#) [Cancel](#)Field Label **Start Date** Field Name **Start_Date**

Description

Help Text

Required Always require a value in this field in order to save a record

Auto add Add this field to existing custom report types that contain this entity

SETUP > OBJECT MANAGER

Leave Request

Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Object Access

Leave Request
New Custom Field

Step 2. Enter the details Step 2 of 4

Field Label: End Date [?](#)
Field Name: End_Date [?](#)
Description:
Help Text:
Required: Always require a value in this field in order to save a record
Auto add to custom: Add this field to existing custom report types that contain this entity [?](#)

SETUP > OBJECT MANAGER

Leave Request

Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Object Access
Triggers

Leave Request
New Custom Field

Step 4. Add to page layouts Step 4 of 4

Field Label: End Date
Data Type: Date
Field Name: End_Date
Description:
Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.
To change the location of this field on the page, you will need to customize the page layout.
 Add Field **Page Layout Name**
 Leave Request Layout
When finished, click Save & New to create more custom fields, or click Save if you are done.

SETUP > OBJECT MANAGER

Leave Request

Leave Request
New Custom Field

Details

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Restriction Rules
- Scoping Rules

Step 4. Add to page layouts Step 4 of 4

Field Label Reason
Data Type Text Area
Field Name Reason
Description

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field
 Leave Request Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous Save & New Save Cancel

SETUP > OBJECT MANAGER

Leave Request

Leave Request
New Relationship

Details

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Restriction Rules

Step 5. Add reference field to Page Layouts Step 5 of 5

Field Label Requested By
Data Type Lookup
Field Name Requested_By
Description

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field
 Leave Request Layout

Previous Save & New Save Cancel

SETUP > OBJECT MANAGER

Leave Request

Details	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIE...	INDEX
	Created By	CreatedById	Lookup(User)		
	End Date	End_Date__c	Date		
	Last Modified By	LastModifiedById	Lookup(User)		
	Leave Request Name	Name	Text(80)	✓	
	Owner	OwnerId	Lookup(User,Group)	✓	
	Reason	Reason__c	Text Area(255)		
	Requested By	Requested_By__c	Lookup(User)	✓	
	Start Date	Start_Date__c	Date		
	Status	Status__c	Picklist		

The screenshot shows the Salesforce Setup Home page. At the top, there's a navigation bar with icons for Home, Object Manager, and a search bar labeled "Search Setup". Below the navigation is the App Launcher, which is currently displaying results for "email". The results include "Email Templates" with options to "List Emails" or "View All". To the right of the App Launcher, there's a large promotional banner for "a Cloud". The banner features the text: "ETUP", "Home", "a Cloud", "object, prepare, harmonize, unify, and analyze data to get a 360-degree view of your customers.", and a "Watch Video" button.

EMAIL TEMPLATE

Lease Management Properties Tenants * Email Templates

Email Templates All Templates

New Email Template

Email Template ...	Description	Email Template...	Last Modified ...	Last Modified ...
--------------------	-------------	-------------------	-------------------	-------------------

New Email Template

Information

Email Template Name: Leave Request Approval Needed

Related Entity Type: None

Description: Leave Request Approval Needed

Folder: Private Email Templates

Message Content

Subject: Leave Request Approval for [Leave_Request__c.Request]

HTML Value:

Dear Manager,
[Leave_Request__c.Requested_By__c] has submitted a leave request from
[Leave_Request__c.Start_Date__c] to [Leave_Request__c.End_Date__c].

Cancel Save

Lease Management Properties Tenants * Leave Request Approval

Email Templates Leave Request Approval

Details Related

Information

Email Template Name: Leave Request Approval

Description: Process to approve employee leave requests

Made in Email Template Builder:

Related Entity Type

Folder: Private Email Templates

Message Content

Subject: Leave Request Approval for [Leave_Request__c.Request]

HTML Value:

Dear Manager,
[Leave_Request__c.Requested_By__c] has submitted a leave request from [Leave_Request__c.Start_Date__c] to [Leave_Request__c.End_Date__c].
Reason: [Leave_Request__c.Reason__c]
Please review and approve.

Additional Information

Created By: Asma Ahmed

Last Modified By: Asma Ahmed

https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/o/EmailTemplate/home

Lease Management Properties Tenants * Leave Rejected

Email Templates All Templates

3 items • Refresh this list to view the latest data

Email Template Name	Description	Email Templates from Salesforce	Last Modified By ID	Last Modified Date
1 Leave Approved	Your Leave Request has been Approved	Private Email Templates	Asma Ahamed.A	9/14/2025, 10:06 AM
2 Leave Rejected	Your Leave Request has been Rejected	Private Email Templates	Asma Ahamed.A	9/14/2025, 10:09 AM
3 Leave Request Approval	Process to approve employee leave requests	Private Email Templates	Asma Ahamed.A	9/14/2025, 10:02 AM

New Email Template

Setup Home Object Manager

approval

SETUP Home

Create

v Data

Mass Transfer Approval Requests

v Feature Settings

Approval Settings

v Process Automation

Approval Processes

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

Setup

Data Cloud

Connect, prepare, harmonize, unify, and analyze data to get a 360-degree view of your customers.

Watch Video Let's Go

Most Recently Used

New Approval Process Help for this Page

Identity Resolutions

Step 1. Enter Name and Description Step 1 of 6

Next Cancel

Enter a name and description for your new approval process.

Enter Name and Description * Required Information

Process Name Leave Request Approval

Unique Name Leave_Request_Approval

Description Process to approve or reject employee leave requests

Next Cancel

Step 3. Specify Approver Field and Record Editability Properties

Step 3 of 6

[Previous](#) [Next](#) [Cancel](#)

When you define approval steps, you can assign approval requests to different users. One of your options is to use a user field to automatically route these requests. If you want to use this option for any of your approval steps, select a field from the picklist below. Also, when a record is in the approval process, it will always be locked-- only an administrator will be able to edit it. However, you may choose to also allow the currently assigned approver to edit the record.

Select Field Used for Automated Approval Routing

Next Automated Approver Determined By

--None--

Record Editability Properties

- Administrators ONLY can edit records
- Administrators OR the currently assigned process.

--None--

Standard User Fields

Manager

Custom User Fields

Create New Hierarchical Relationship Field

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.

New Approval Process Identity Resolutions

[Help for this Page](#)

Step 4. Select Notification Templates

Step 4 of 6

[Previous](#) [Next](#) [Cancel](#)

Select the email template that will be used to notify approvers that an approval request has been assigned to them. Note that this template will be used for all steps for this process. [Create a new email template](#)

Email Template

Approval Assignment Email Template

[Previous](#) [Next](#) [Cancel](#)

If only certain types of records should enter this approval process, enter that criteria below. For example, only expense reports from employees at headquarters should use this approval process.

Specify Entry Criteria

Use this approval process if the following [criteria are met](#) :

Field

--None--
--None--
--None--
--None--
--None--

Operator

--None--
--None--
--None--
--None--
--None--

[Add Filter Logic...](#)

[Previous](#) [Next](#) [Cancel](#)

OUTPUT:

The screenshot shows the Salesforce Setup Home page. The left sidebar contains links for Setup Home, Salesforce Go, Service Setup Assistant, Commerce Setup Assistant, Field Service Setup Home (Beta), Hyperforce Assistant, Release Updates, Salesforce Mobile App, Lightning Usage Optimizer, Sales Cloud Everywhere, Administration (Users, Data, Email), and Platform Tools (Subscription Management, Apps, Feature Settings, Slack). The main content area features four cards: Data Cloud (Watch Video, Let's Go), Get Started with Einstein Bots (Get Started), Mobile Publisher (Learn More), and Join the Trailblazer Community (Join Now). Below these is a section titled "Most Recently Used" showing 10 items: TenantTrigger (Apex Trigger, Tenant), Asma Ahamed.A (User), testHandler_Test (Apex Class), SFDC_DevConsole (Debug Level), and testHandler (Apex Class).

The screenshot shows the Lease Management - Tenants page. The top navigation bar includes links for Home | Salesforce, Recently Viewed | Tenants | Sales:, and a search bar. The main content area displays a table of recently viewed tenants. The table has columns for Tenant Name and a checkbox column. Two items are listed: 1. achu and 2. John Doe.

	Tenant Name
1	achu
2	John Doe

Management

New Tenant

* = Required Information

Information

* Tenant Name	<input type="text" value="Arish"/>	Owner	Asma Ahamed.A
Phone	<input type="text" value="987654321"/>		
Email	<input type="text" value="arishvanth.10@gmail.com"/>		
Property	<input type="text" value="Sunrise Apartments"/> ×		
Active	<input checked="" type="checkbox"/>		

Lease Management

Tenants

Recently Viewed ▾

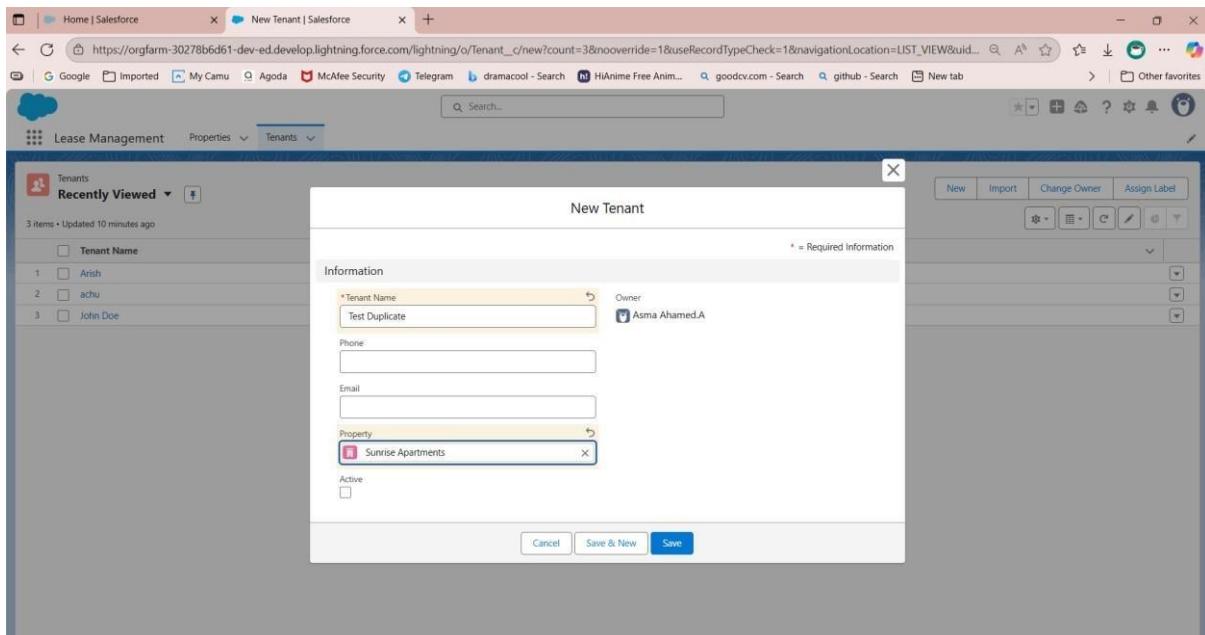
3 items • Updated 9 minutes ago

	Tenant Name	
1	Arish	▼
2	achu	▼
3	John Doe	▼

New Import Change Owner Assign Label

The code should **BLOCK** this save and show a **RED ERROR MESSAGE** at the top of the screen saying:

"A Property can only have one active Tenant. Please select a vacant property."



New Tenant

* = Required Information

Information

* Tenant Name

Test Duplicate

Owner

Asma Ahamed.A

Phone

Email

Property

∅ We hit a snag.

Review the errors on this page.

- A Property can only have one active Tenant. Please select a vacant property.



Cancel

Save & New

Save

2. ADVANTAGES & BENEFITS

Automated Duplicate Prevention: Eliminates multiple active tenants per property through validation rules and Apex triggers

Streamlined Communication: Automated email alerts and approval processes reduce manual follow-ups

Centralized Data Management: All lease-related information (properties, tenants, payments) in one platform

Real-time Updates: Instant status tracking for lease applications, approvals, and maintenance requests

Mobile Accessibility: Accessible via Salesforce mobile app for on-the-go management

2.1 CHALLENGES & CONSIDERATIONS

Initial Setup Complexity: Requires custom object creation and Apex development

Training Requirements: Staff needs training for Salesforce interface and processes

Ongoing Maintenance: Regular updates needed for changing business rules

Integration Needs: May require additional integration with accounting systems

Cost Considerations: Salesforce licensing and potential development costs

3. CONCLUSION

The Lease Management System represents a significant digital transformation in property management operations. By leveraging Salesforce's robust platform, the system successfully automates critical processes including tenant screening, lease management, and communication workflows. The implementation demonstrates how cloud-based solutions can enhance operational efficiency, reduce errors, and provide real-time visibility into portfolio performance. This foundation also allows for future scalability and integration with additional property management functionalities as business needs evolve.

