

LEASEMANAGEMENT

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1. INTRODUCTION

1. Project Overview

This project is focused on the development and implementation of a Lease Management System using Salesforce, designed to address the challenges of manual property lease tracking, tenant management, payment processing, and

communication within the organization. The goal is to deliver a comprehensive solution that streamlines and automates various aspects of lease management, from contract creation to payment tracking, approval workflows, and reporting.



1. Purpose

The main objective of the project is to enable organizations to efficiently manage properties, tenants, and lease-related activities. It reduces manual intervention, improves accuracy, and ensures better compliance and communication.

DEVELOPMENT PHASE

Creating Developer Account:

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

Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud.

Sign up for your Developer Edition.

✓

Build apps fast with drag-and-drop tools

✓

Go further with Apex code

✓

Build AI agents with Agentforce

✓

Harmonize your data with Data Cloud

✓

Ground Agentforce with structured and unstructured data

✓

Integrate with anything using APIs

Steps

1 Select Type

Customer Support

Sales Coach

Sales Development

Agentforce

Agentforce

Customer Support

Sales Coach

Sales Development

Sign up for your Developer Edition

A free Salesforce Platform environment with Agentforce and Data Cloud

First name

DHARANI

Last name

DHARAN

Job title

DEVELOPER

Work email

21dharani21s@gmail

Company

Hindusthan college

Country/Region

India

Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud infrastructure.

☒

I agree to the Main Services Agreement – Developer Services and Salesforce Program Agreement; I acknowledge, as described in the Developer Documentation: (1) the Developer Edition includes autonomous and other generative AI features; and (2) Salesforce may limit use of those features and the org, and may terminate any org that has been inactive for 45 days.

We value your privacy. To learn more, visit our Privacy Statement.

✓

I'm not a robot

reCAPTCHA

Privacy • Terms

Sign Me Up

■

Created objects: Property, Tenant, Lease, Payment

Search Setup

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Tenant

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Links

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Success Pages

Details

Description

API Name

Tenant__c

Custom

✓ Singular Label

Tenant

Plural Label

Tenants

Builder Reports

✓

Track Activities

✓

Track Field History

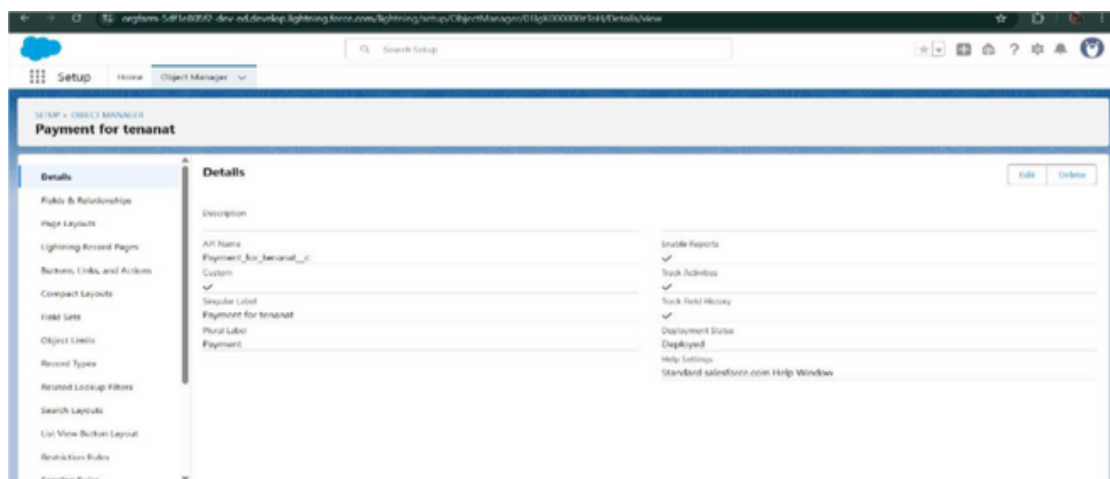
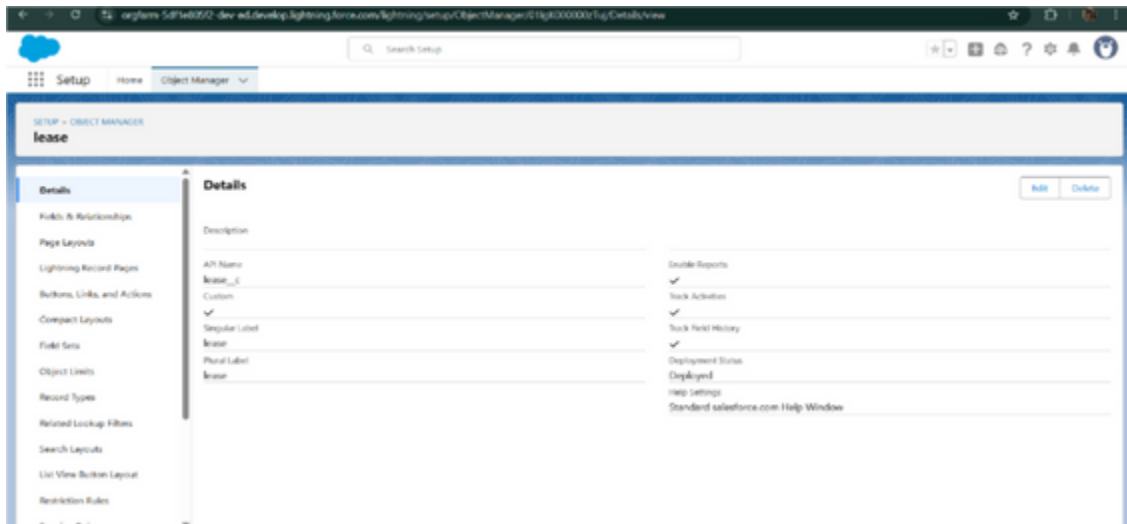
✓

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window



- Configured fields and relationships

Setup

Home

Object Manager

Search Setup

Setup > OBJECT MANAGER

property

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Fields & Relationships

9 items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Long Text Area(32768)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Text(255)		
Owner	OwnerId	Lookup(User Group)		✓
property	property__c	Lookup(property)		✓
property Name	Name	Text(30)		✓
slug	slug__c	Text(18)		
Type	Type__c	Picklist		

Setup

Home

Object Manager

Search Setup

Setup > OBJECT MANAGER

Payment for tenanat

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Fields & Relationships

7 items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Number(18, 0)		
check for payment	check_for_payment__c	Picklist		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User Group)		✓
Payment date	Payment_date__c	Date		
Payment Name	Name	Text(30)		✓

Setup

HomeObject Manager

Search Setup

Star

Plus

Help

Settings

Notifications

User

SETUP > OBJECT MANAGER

lease

Details

Fields & Relationships

7 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
End date	End_date__c	Date		
Last Modified By	LastModifiedById	Lookup(User)		
lease Name	Name	Text(80)		✓
Owner	OwnerId	Lookup(User:Group)		✓
property	property__c	Lookup(property)		✓
start date	start_date__c	Date		

Setup

HomeObject Manager

Search Setup

Star

Plus

Help

Settings

Notifications

User

SETUP > OBJECT MANAGER

Tenant

Details

Fields & Relationships

7 Items, Sorted by Field Label

Quick Find

New

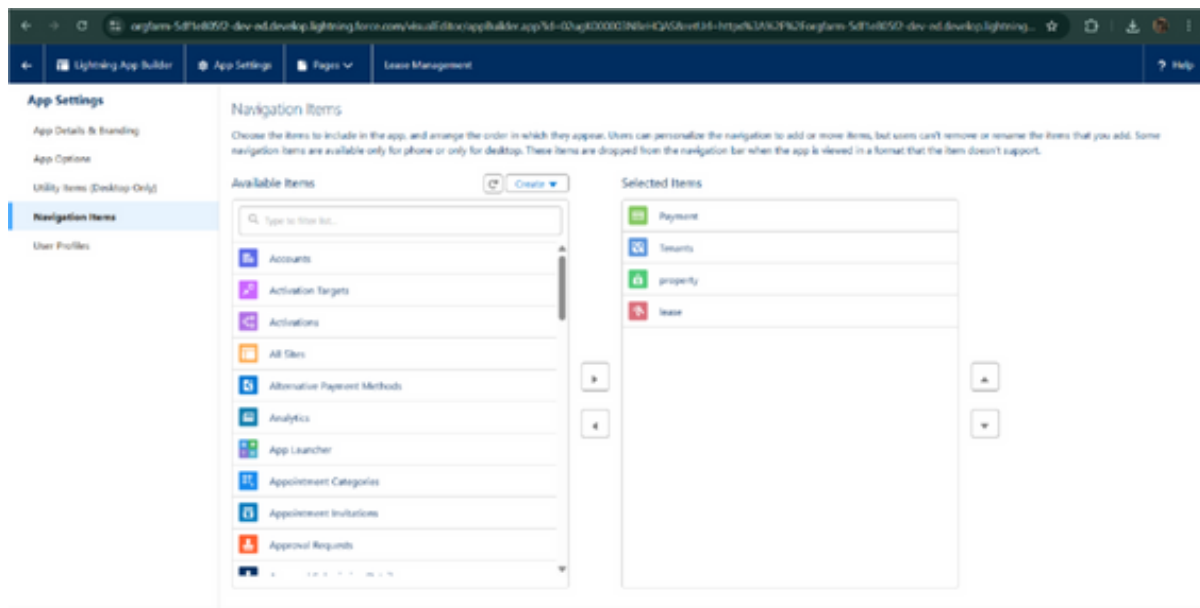
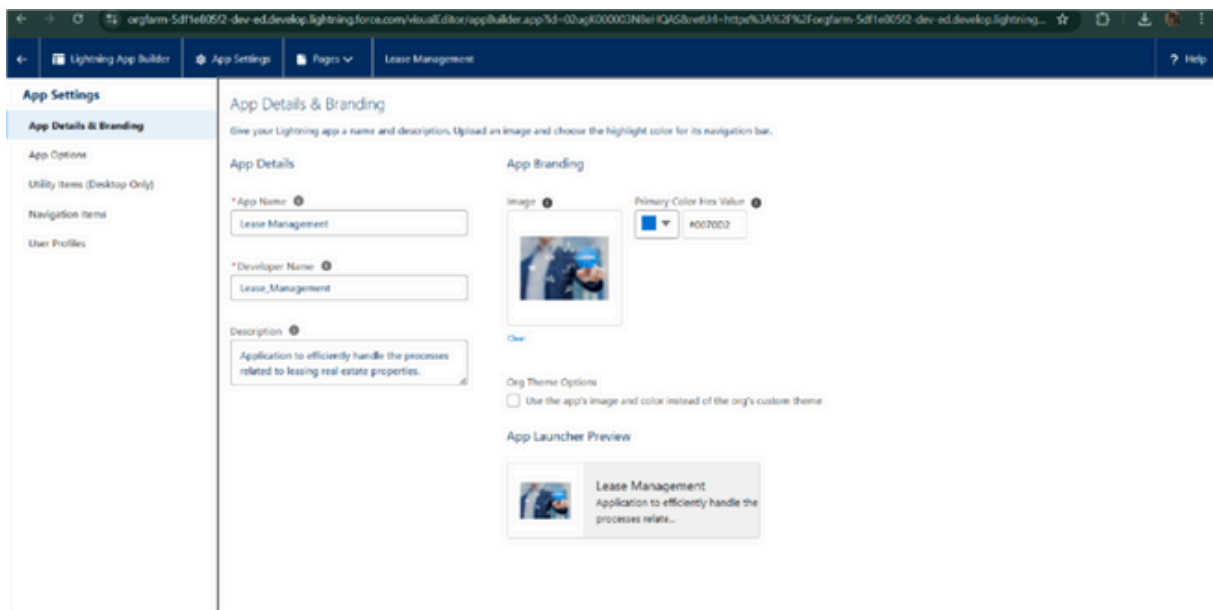
Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User:Group)		✓
Phone	Phone__c	Phone		
status	status__c	Picklist		
Tenant Name	Name	Text(80)		✓

- Developed Lightning App with relevant tabs



orglarm-5d1e8052-dev-ed.develop.lightning.force.com/visualEditor/appBuilder.app?d=02ag000003N8elQAS&retM=+https%3A%5C%2Forglarm-5d1e8052-dev-ed.develop.lightning...

Lightning App Builder | App Settings | Pages | Lease Management | Help

App Settings

- App Details & Branding
- App Options
- Utility Items (Desktop Only)
- Navigation Items
- User Profiles**

User Profiles

Choose the user profiles that can access this app.

Available Profiles

Type to filter list...

- Analytics Cloud Integration User
- Analytics Cloud Security User
- Anypoint Integrations
- Authenticated Website
- Authenticated Website
- B2B Reordering Portal Buyer Profile
- Contract Manager
- Custom Marketing Profile
- Custom Sales Profile
- Custom Support Profile
- Customer Community Login User

Selected Profiles

- System Administrator

orglarm-5d1e8052-dev-ed.develop.lightning.force.com/lightning/ui/Payment_for_tenant__of178aName-Recent

Lease Management | Payment | tenants | property | lease

Payment

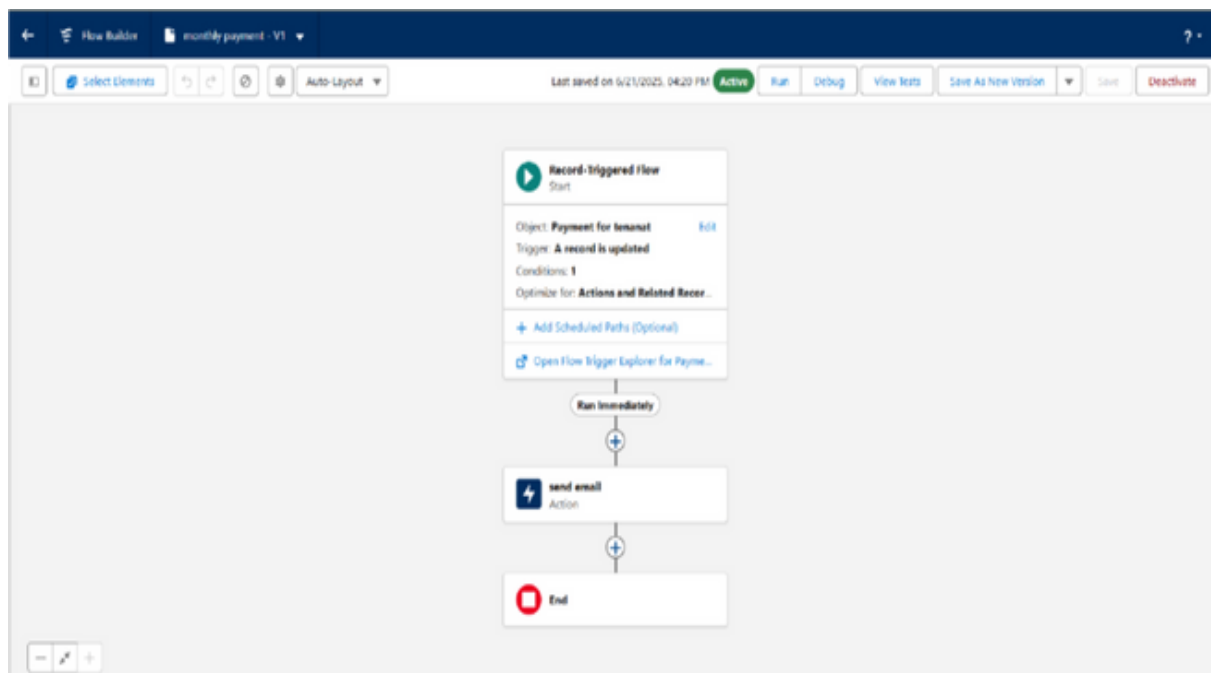
Recently Viewed

5 items • Updated a few seconds ago

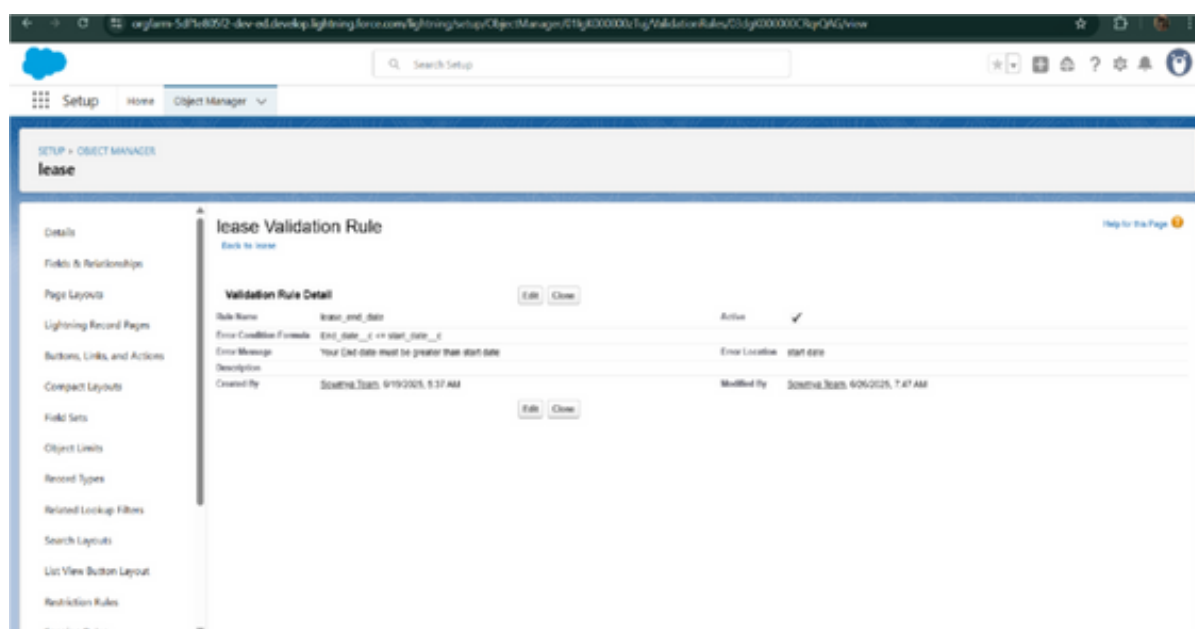
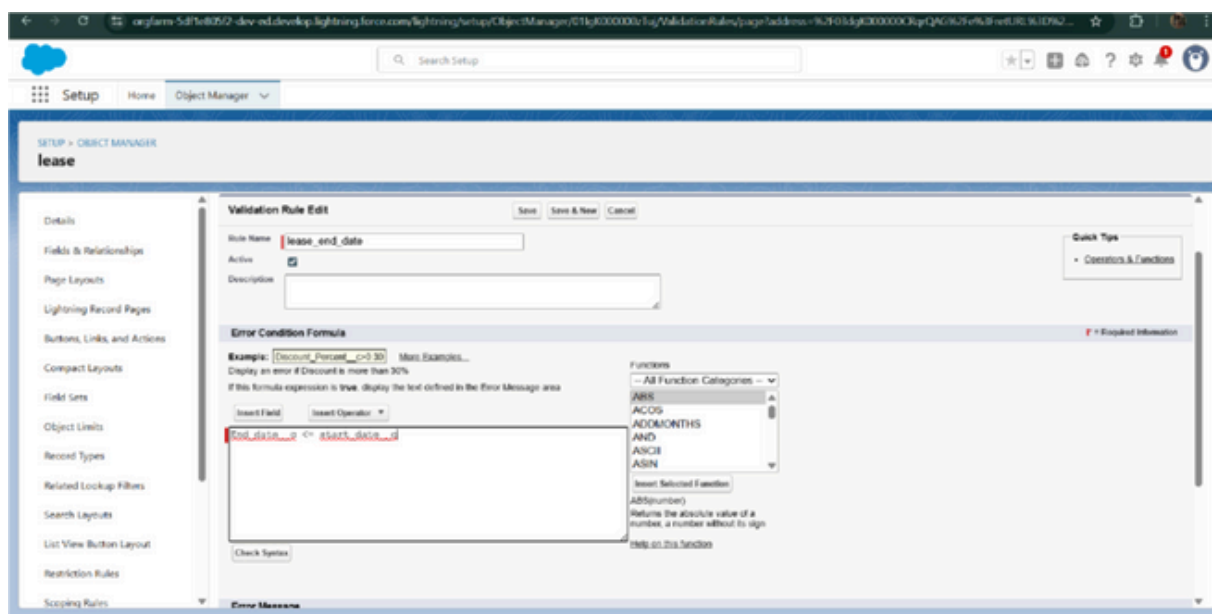
New Import Change Demo Assign Label

Search this list...

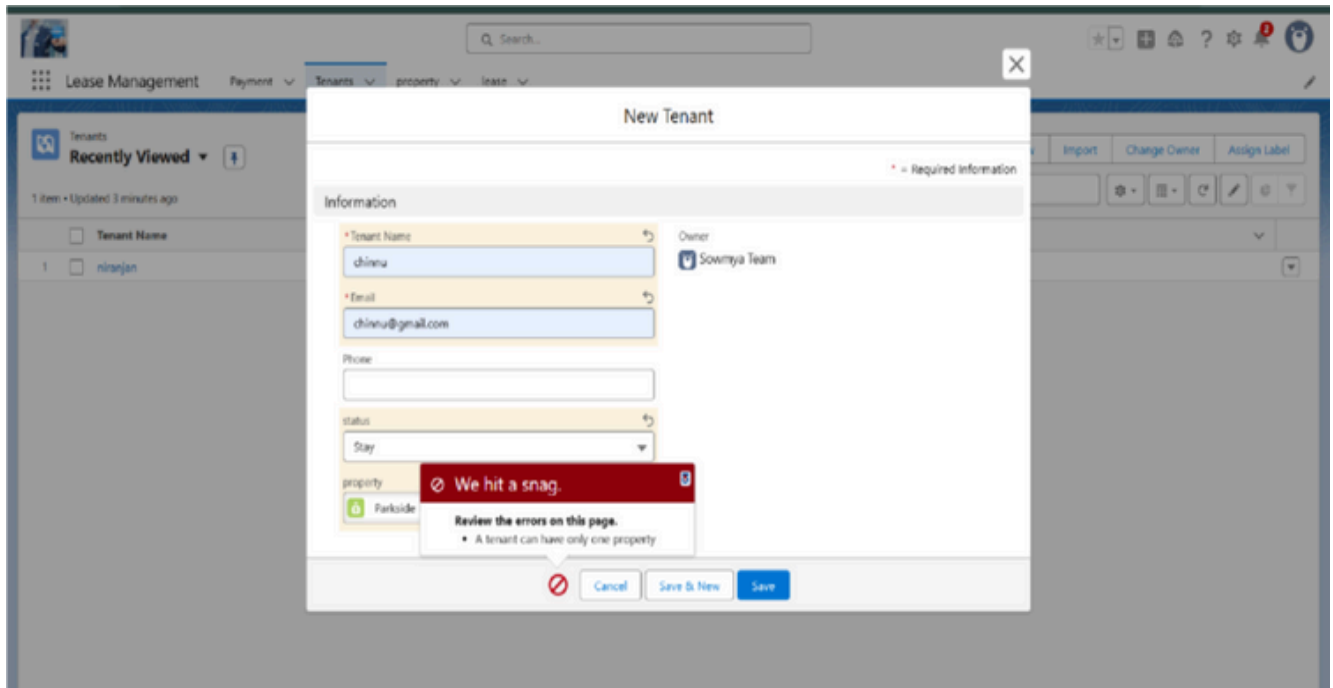
	Payment Name	
1	Rahul	
2	Jack	
3	Raj	
4	Sam	
5	Lehar	



- Implemented Flows for monthly rent and payment success
- To create a validation rule to a Lease Object



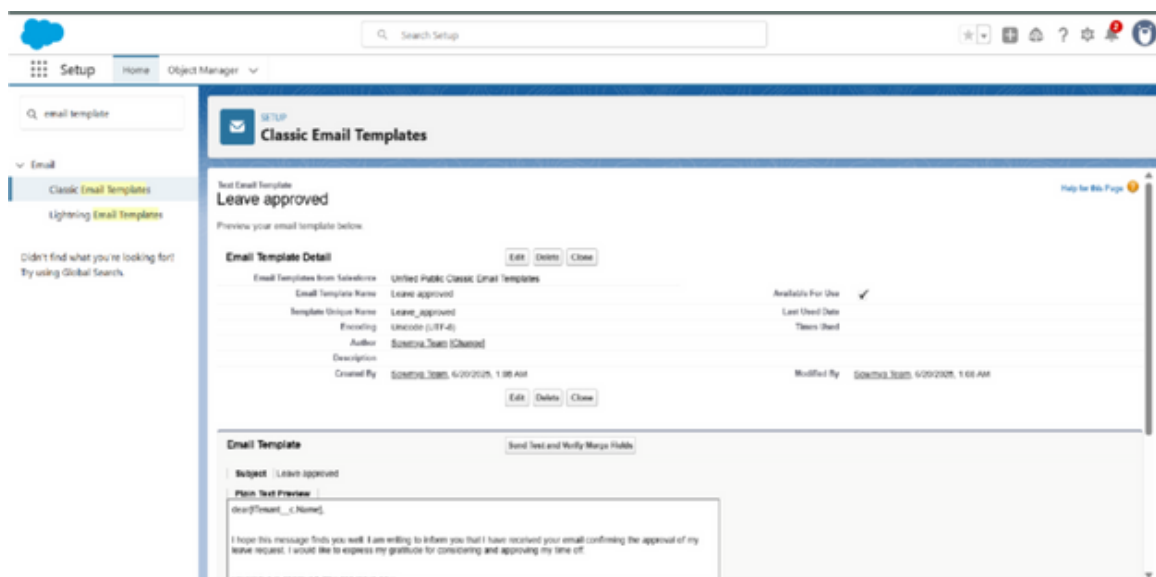
- Added Apex trigger to restrict multiple tenants per property



- Scheduled monthly reminder emails using Apex class

```
1 • global class MonthlyEmailScheduler implements Scheduler {
2
3 •   global void execute(ScheduleContext sc) {
4
5       Integer currentDay = Data.today().day();
6
7       if (currentDay == 1) {
8
9           sendMonthlyEmails();
10
11       }
12
13   }
14
15   public static void sendMonthlyEmails() {
16
17       List<Tenant__c> tenants = [SELECT Id, Email__c FROM Tenant__c];
18
19       for (Tenant__c tenant : tenants) {
20
21           String recipientEmail = tenant.Email__c;
22
23           String emailContent = "I trust this email finds you well. I am writing to remind you that the monthly rent is due. Your timely payment ensures the smooth functioning of our rental arrangement and helps maintain c";
24
25           String emailSubject = "Reminder: Monthly Rent Payment Due";
26
27           Messaging.SingleEmailMessage email = new Messaging.SingleEmailMessage();
28
29           email.setToAddresses(new String[]{recipientEmail});
30
31           email.setSubject(emailSubject);
32
33           email.setPlainTextBody(emailContent);
34
35       }
36   }
37 }
```

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



Setup

Home

Object Manager

Search Setup

email template

Email

Classic Email Templates

Lightning Email Templates

Didn't find what you're looking for?

Try using Global Search.

Classic Email Templates

Test Email Template

tenant leaving

Preview your email template below

Email Template Detail

Email Template Name

tenant leaving

Available For Use

✓

Template Unique Name

tenant_leaving

Last Used Date

Never Used

Encoding

Unicode (UTF-8)

Created By

SCOTT.W. JONES, 6/29/2025, 1:06 AM

Modified By

SCOTT.W. JONES, 6/29/2025, 1:06 AM

Email Template

Send Text and Verify Merge Fields

Subject

Request for approval the issue

Plain Text Preview

Dear {Tenant__c.CreatedBy},

Please approve my loan

Setup

Home

Object Manager

Search Setup

email template

Email

Classic Email Templates

Lightning Email Templates

Didn't find what you're looking for?

Try using Global Search.

Classic Email Templates

Test Email Template

Leave rejected

Preview your email template below

Email Template Detail

Email Template Name

Leave rejected

Available For Use

✓

Template Unique Name

Leave_rejected

Last Used Date

Never Used

Encoding

Unicode (UTF-8)

Created By

SCOTT.W. JONES, 6/29/2025, 1:11 AM

Modified By

SCOTT.W. JONES, 6/29/2025, 1:11 AM

Email Template

Send Text and Verify Merge Fields

Subject

Leave rejected

Plain Text Preview

Dear {Tenant__c.Name},

I hope this email finds you well. Your contract has not ended, so we can't approve your loan
your loan has rejected

- Approval Process creation

For Tenant Leaving:

The screenshot shows the Salesforce Setup interface for 'Approval Processes'. The left sidebar contains a search bar and a navigation menu with categories: Data, Feature Settings, and Process Automation. Under 'Process Automation', 'Approval Processes' is selected. The main content area displays the configuration for a process named 'TenantApproval'.

Process Definition Detail

Process Name	TenantApproval	Active	<input checked="" type="checkbox"/>
Unique Name	TenantApproval	Next Automated Approver Determined By	
Description			
Entry Criteria	Process is in status Record Stay		
Record Eligibility	Administrator ONLY	Allow Submitters to Recall Approval Requests	<input type="checkbox"/>
Approval Assignment Email Template			
Initial Submitters	Tenant Owner		
Created By	System Team, 6/23/2025, 3:41 AM	Modified By	System Team, 6/26/2025, 11:57 PM

Initial Submission Actions

Action	Type	Description
Record Lock		Lock the record from being edited

Approval Steps

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Step 1	1	Step 1			User: JOURNAL_TEAM	Final Rejection

For Check for Vacant:

The screenshot shows the Salesforce Setup interface for 'Approval Processes'. The left sidebar is identical to the previous screenshot. The main content area displays the configuration for a process named 'check for vacant'.

Process Definition Detail

Process Name	check for vacant	Active	<input checked="" type="checkbox"/>
Unique Name	check_for_vacant	Next Automated Approver Determined By	
Description			
Entry Criteria	Process is in status RECORD LEAVING		
Record Eligibility	Administrator ONLY	Allow Submitters to Recall Approval Requests	<input type="checkbox"/>
Approval Assignment Email Template	LEAVE_APPROVAL		
Initial Submitters	Tenant Owner		
Created By	System Team, 6/20/2025, 3:10 AM	Modified By	System Team, 6/26/2025, 11:02 PM

Initial Submission Actions

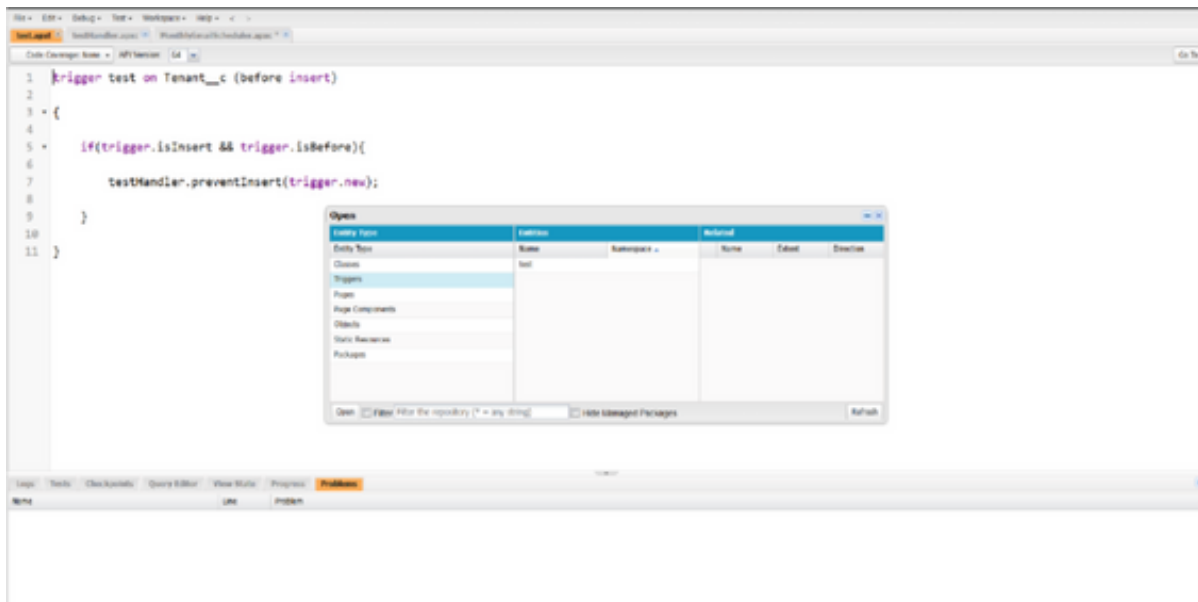
Action	Type	Description
Record Lock		Lock the record from being edited
Email Alert		DEBRIE APPROVAL FOR LEAVE

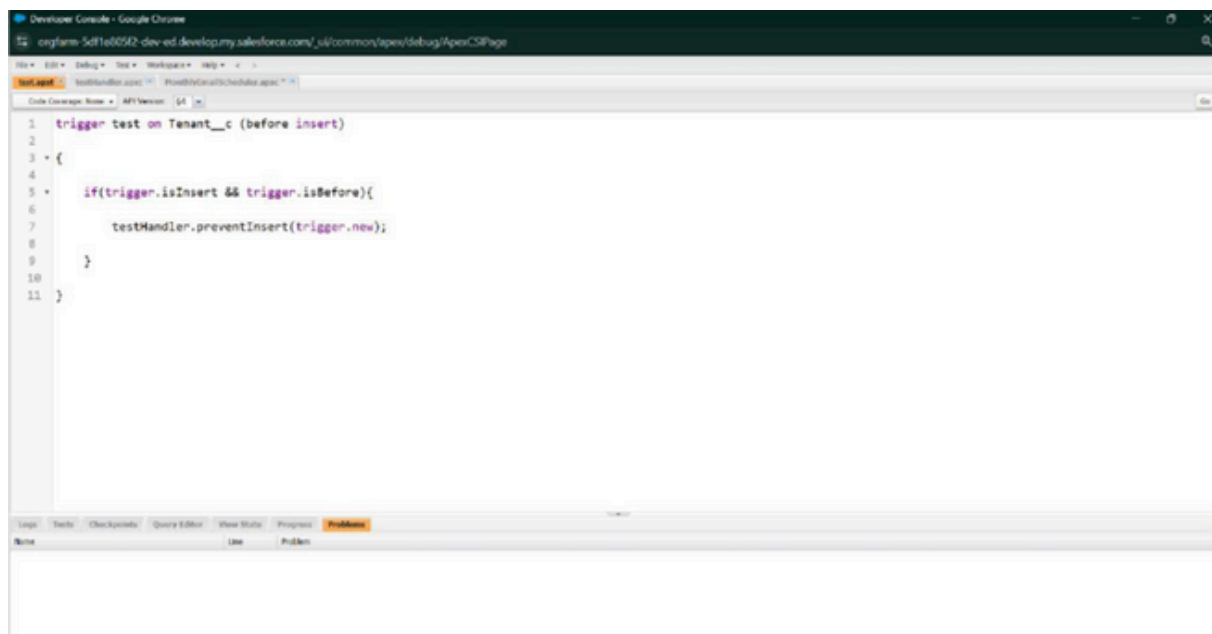
Approval Steps

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
step1	1	step1			User: JOURNAL_TEAM	Final Rejection

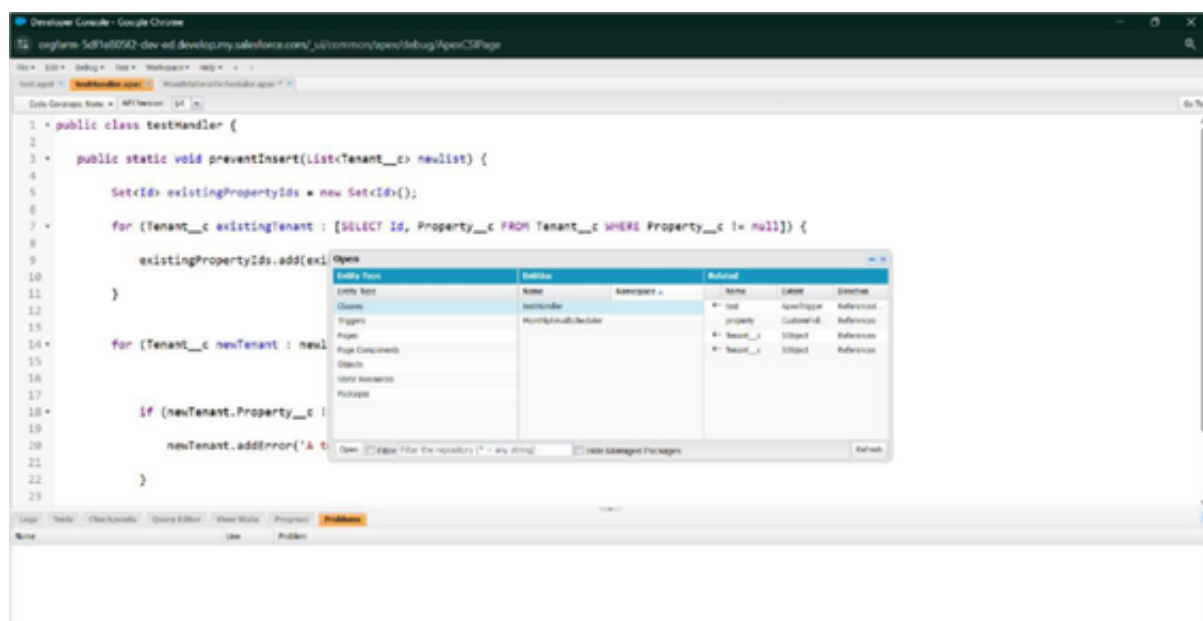
- Apex Trigger

Create an Apex Trigger





Create an Apex Handler class

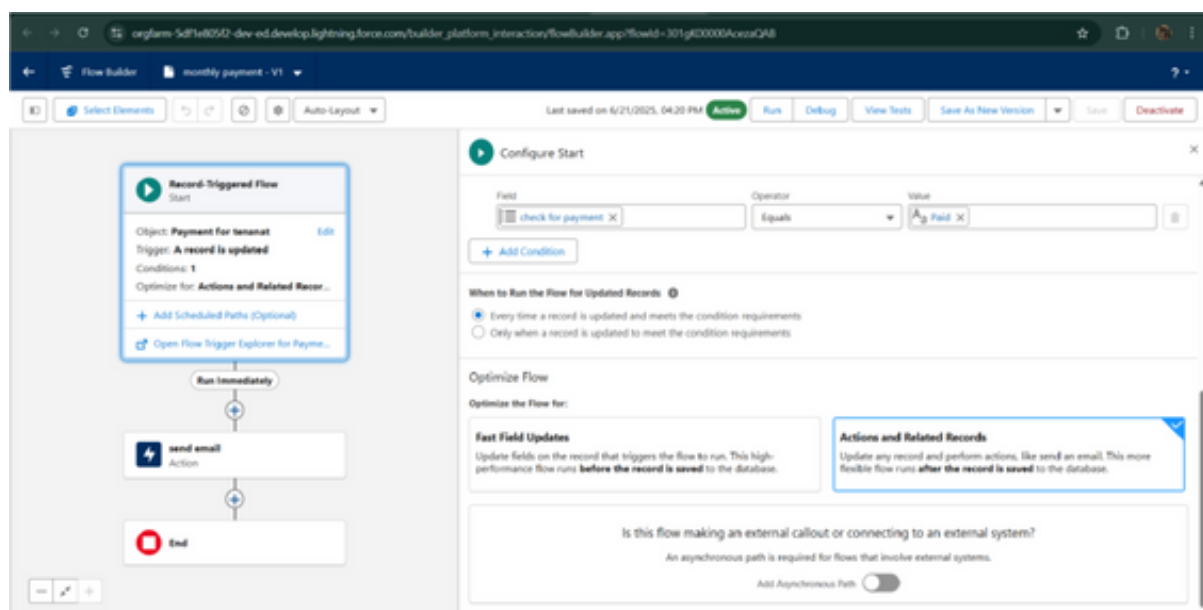


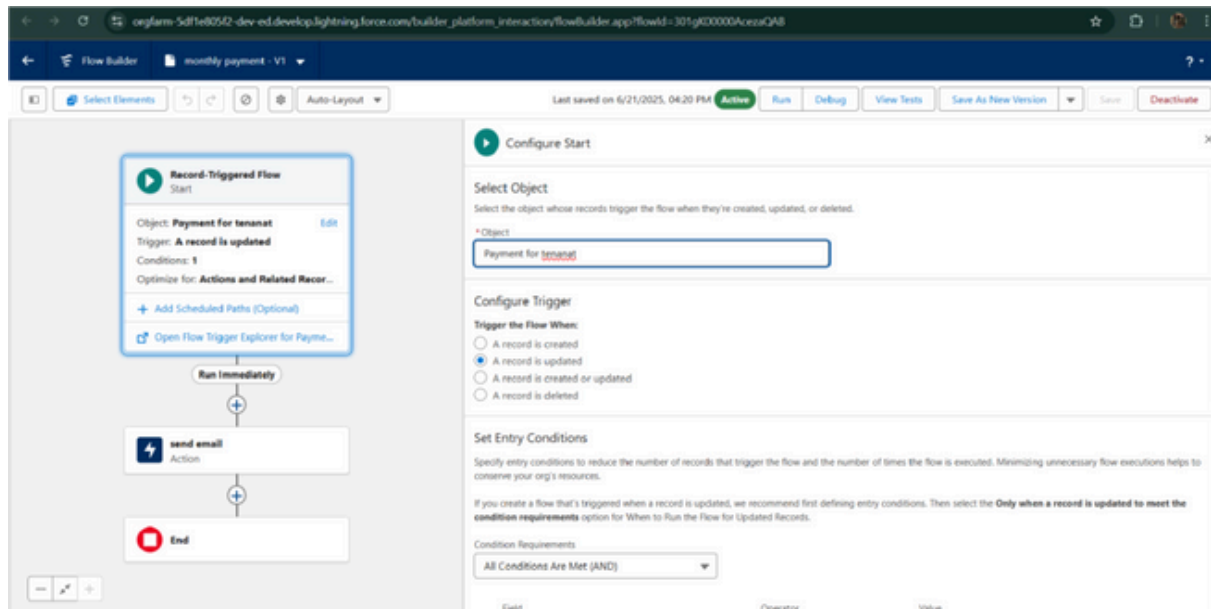
```
Developer Console - Google Chrome
orgfam-Sdfta0252-dev-ed.develop.my.salesforce.com/ ui/common/apex/debug/ApexCSPage

test.apex | testHandler.apex | #testHandler.apex | R
Code Coverage: None | API Version: 54 | Go To

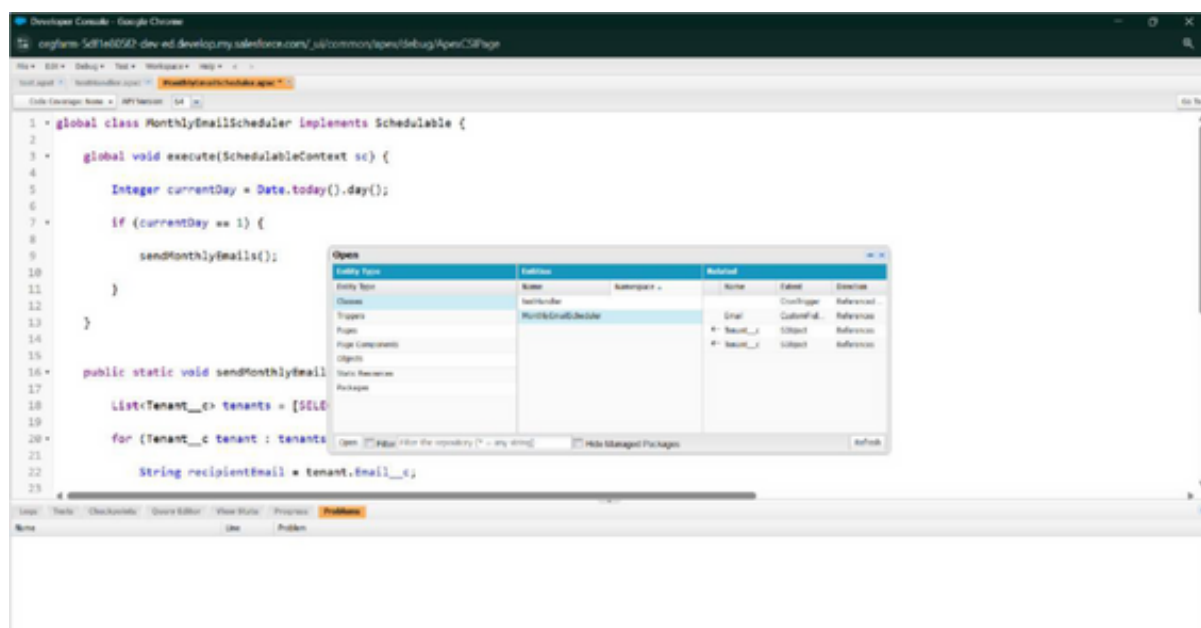
1 public class testHandler {
2
3     public static void preventInsert(list<Tenant__c> newList) {
4
5         Set<Id> existingPropertyIds = new Set<Id>();
6
7         for (Tenant__c existingTenant : [SELECT Id, Property__c FROM Tenant__c WHERE Property__c != null]) {
8             existingPropertyIds.add(existingTenant.Property__c);
9         }
10
11         for (Tenant__c newTenant : newList) {
12
13             if (newTenant.Property__c != null && existingPropertyIds.contains(newTenant.Property__c)) {
14                 newTenant.addError('A tenant can have only one property');
15             }
16         }
17     }
18 }
19
20
21
22
23
```

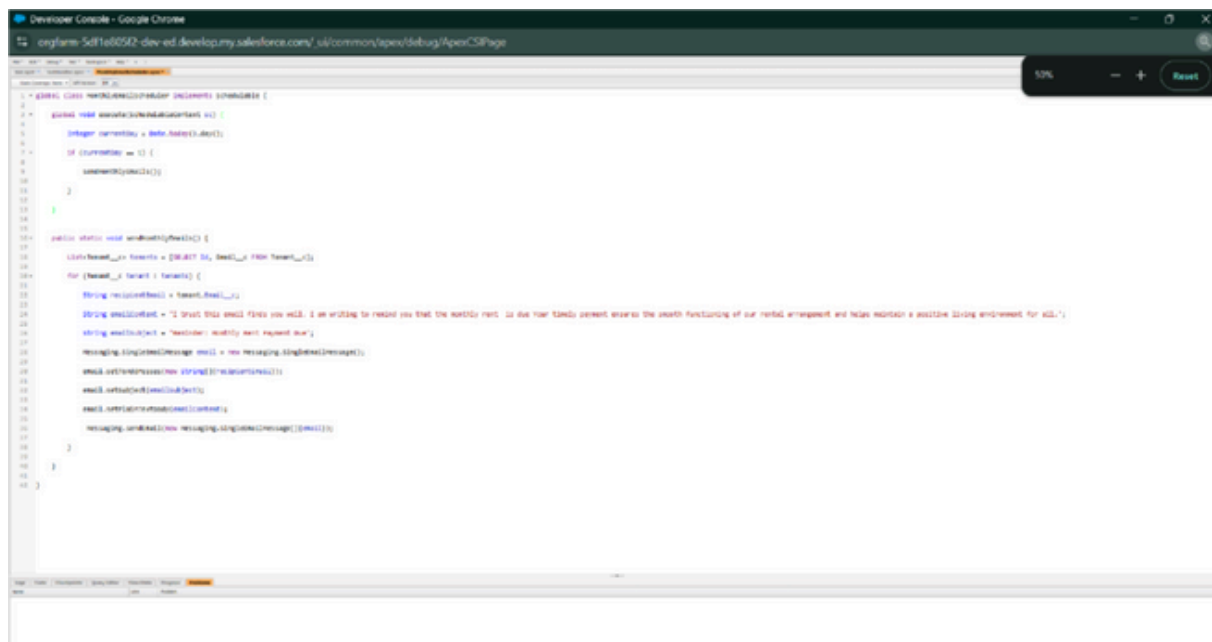
- FLOWS





- Schedule class: Create an Apex Class





Schedule Apex class

Setup

Home

Object Manager

apex

Email

Apex Exception Email

Custom Code

Apex Classes

Apex Settings

Apex Test Execution

Apex Test History

Apex Triggers

Environments

Jobs

Apex Flow Queue

Apex Jobs

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

Apex Classes

Apex Class Detail

MonthlyEmailScheduler

MonthlyEmailScheduler

Created By

6/23/2025, 2:46 AM

Status

Active

Code Coverage

0% (0/10)

Last Modified By

6/23/2025, 2:47 AM

Class Body

Class Summary

Version Settings

Trace Logs

```
1 global class MonthlyEmailScheduler implements Schedulable {
2     global void execute(SchedulableContext sc) {
3         Integer currentDay = Date.today().day();
4         if (currentDay == 1) {
5             sendMonthlyEmail();
6         }
7     }
8     public static void sendMonthlyEmail() {
9         List<Tenant__c> tenants = [SELECT Id, Email__c FROM Tenant__c];
10        for (Tenant__c tenant : tenants) {
```

orgfarm-dde364ed15-dev-ed.develop.lightning.force.com/lightning/r/Tenant__c/a01gl00000KbYlQAN/view

Lease Management

Payment

Tenants

Properties

lease

Tenant Janani

New Contact

Edit

New Opportunity

Related

Details

Tenant Name

Janani

Email

aswinjanani2011@gmail.com

Phone

Status

Stay

Property

House

Created By

JANANI P. 9/5/2025, 5:16 AM

Owner

JANANI P.

Last Modified By

JANANI P. 9/8/2025, 7:54 AM

Activity

Filters: All time • All activities • All types

Refresh

Expand All

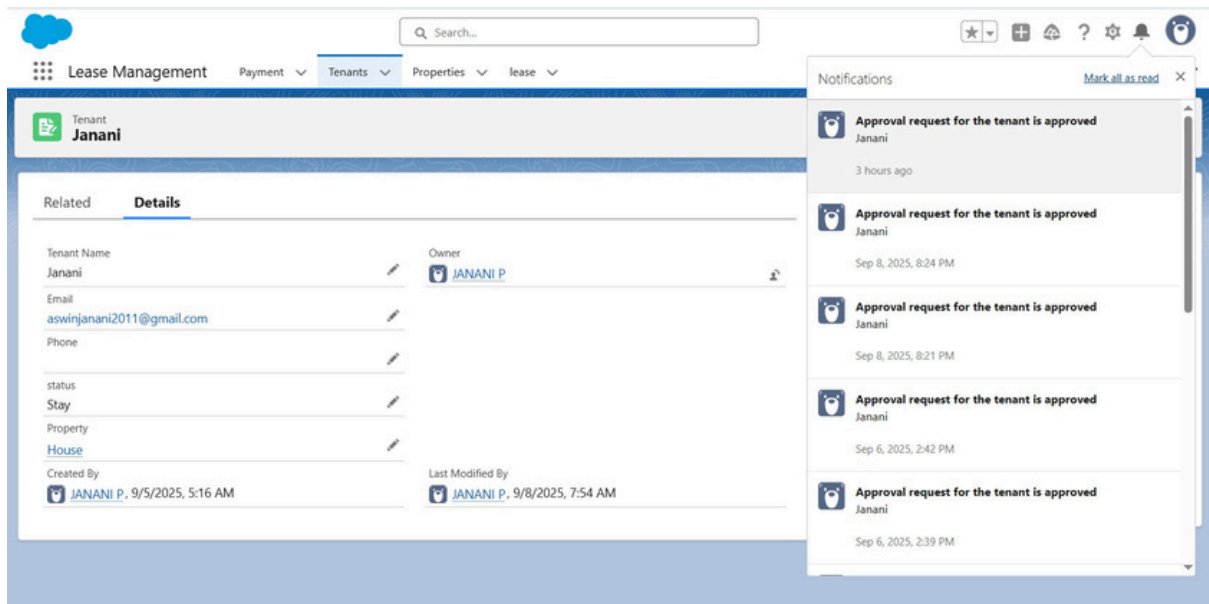
View All

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.



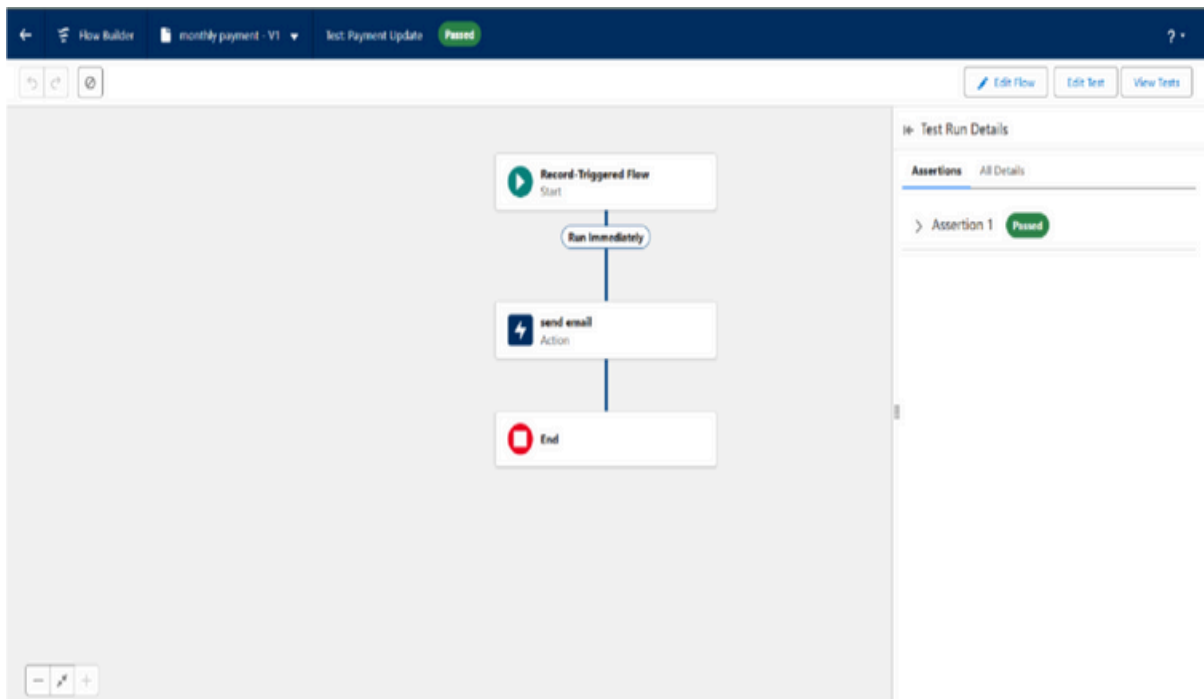
FUNCTIONALAND PERFORMANCE TESTING

Performance Testing

- Trigger validation by entering duplicate tenant-property records



- Validation Rule checking



The screenshot shows a 'Lease Management' application. The top navigation bar includes 'Lease Management', 'Payment', 'Tenants', 'Properties', and 'lease'. A search bar is present. The main content area shows the details for a tenant named 'Janani'. The details include: Tenant Name (Janani), Email (aswinjanani2011@gmail.com), Phone, status (Stay), Property (House), Created By (JANANI P, 9/5/2025, 5:16 AM), and Last Modified By (JANANI P, 9/8/2025, 7:54 AM). On the right side, there's a 'Notifications' panel with a 'Mark all as read' link. The notifications list includes: 'Approval request for the tenant is approved Janani' (3 hours ago), 'Approval request for the tenant is approved Janani' (Sep 8, 2025, 8:24 PM), 'Approval request for the tenant is approved Janani' (Sep 8, 2025, 8:21 PM), 'Approval request for the tenant is approved Janani' (Sep 6, 2025, 2:42 PM), and 'Approval request for the tenant is approved Janani' (Sep 6, 2025, 2:39 PM).

- Test flows on payment update

Lease Management

Payment

Tenants

property

lease

Tenant

niranjan

New Contact

Edit

New Opportunity

Approval History (6+)

Step Name	Date	Status	Assigned To
Step 1	6/25/2025, 5:39 AM	Approved	Sowmya Team
Approval Request Submitted	6/25/2025, 5:39 AM	Submitted	Sowmya Team
Step 1	6/23/2025, 3:59 AM	Rejected	Sowmya Team
Approval Request Submitted	6/23/2025, 3:58 AM	Submitted	Sowmya Team
Step 1	6/23/2025, 3:55 AM	Approved	Sowmya Team
Approval Request Submitted	6/23/2025, 3:55 AM	Submitted	Sowmya Team

View All

Payment (2)

New

Payment Name

Jack

Rahul

View All

Get started by sending an email, scheduling a task, and more.

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

RESULTS

Setup

Home

Object Manager

Q: Tabs

User Interface

Rename Tabs and Labels

Tab

Didn't find what you're looking for?

Try using Global Search.

SETUP

Tabs

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs

New | What is This?

Action	Label	Tab Style	Description
CRM CRM	Basic	Basic	
CRM CRM	Payment	Credit card	
CRM CRM	Account	Basic	
CRM CRM	Search	Map	

Web Tabs

New | What is This?

No Web Tabs have been defined

Visualforce Tabs

New | What is This?

No Visualforce Tabs have been defined

Output Screenshots

■

Lease Management

Payment

Servants

property

leave

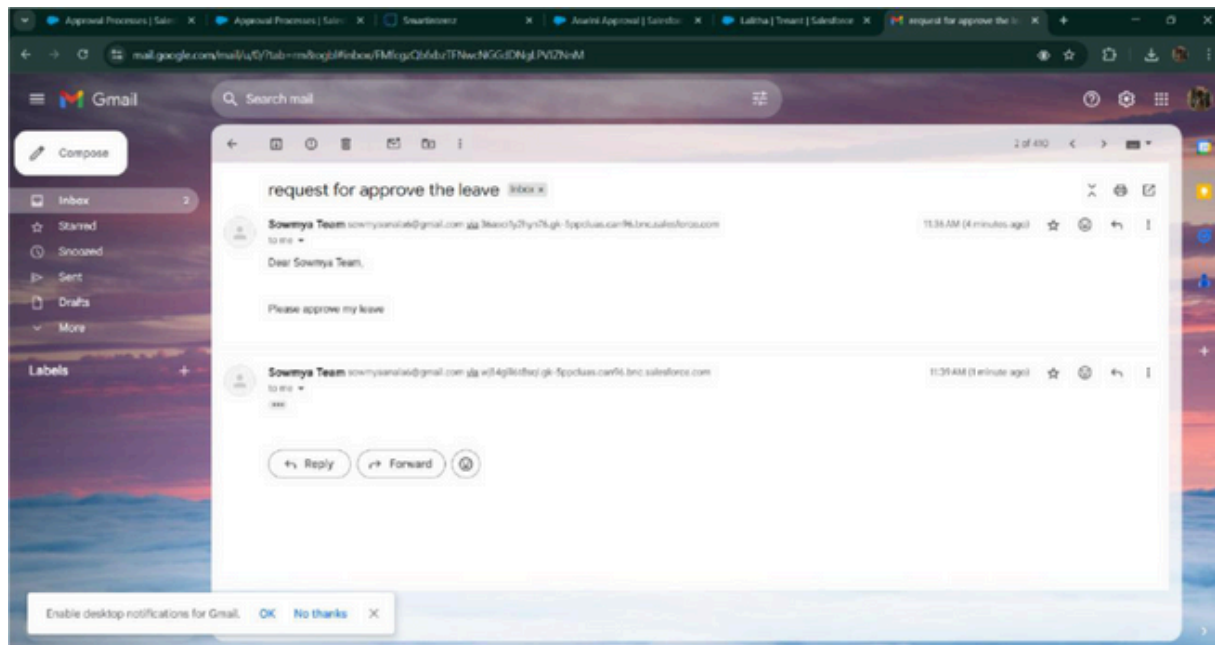
Q Search...

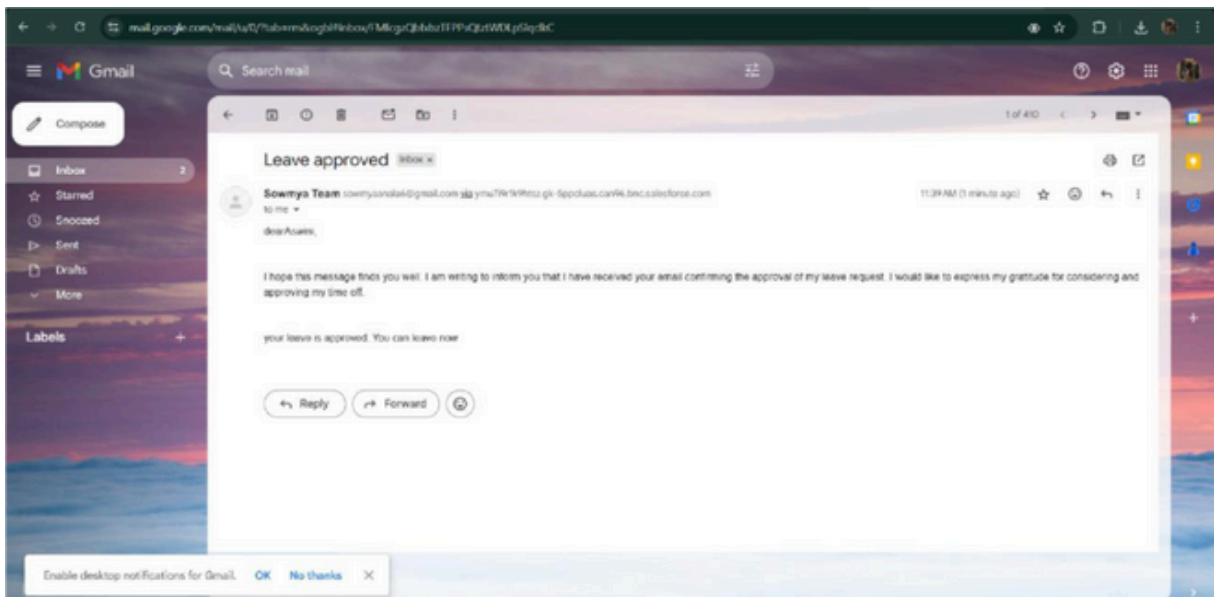
Servants > **Approval History**

8 items • Sorted by Is Pending • Updated a few seconds ago

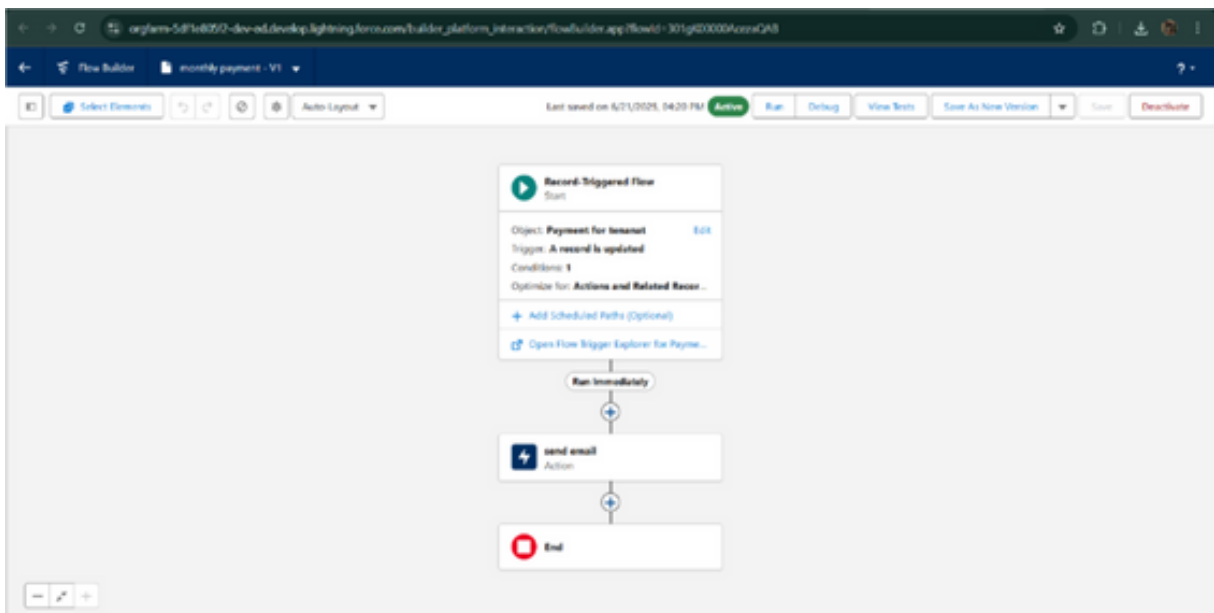
Step Name	Date	Status	Assigned To	Actual Approver	Comments
1 Step 1	6/03/2025, 5:39 AM	Approved	Sowmya Team	Sowmya Team	approved
2 Approval Request Submitted	6/03/2025, 5:50 AM	Submitted	Sowmya Team	Sowmya Team	invoing
3 Step 1	6/03/2025, 3:50 AM	Rejected	Sowmya Team	Sowmya Team	Rejected
4 Approval Request Submitted	6/03/2025, 3:50 AM	Submitted	Sowmya Team	Sowmya Team	Leaving
5 Step 1	6/03/2025, 3:50 AM	Approved	Sowmya Team	Sowmya Team	Approved
6 Approval Request Submitted	6/03/2025, 3:50 AM	Submitted	Sowmya Team	Sowmya Team	invoing
7 Step 1	6/03/2025, 3:44 AM	Approved	Sowmya Team	Sowmya Team	Approval Approved
8 Approval Request Submitted	6/03/2025, 3:42 AM	Submitted	Sowmya Team	Sowmya Team	Leaving

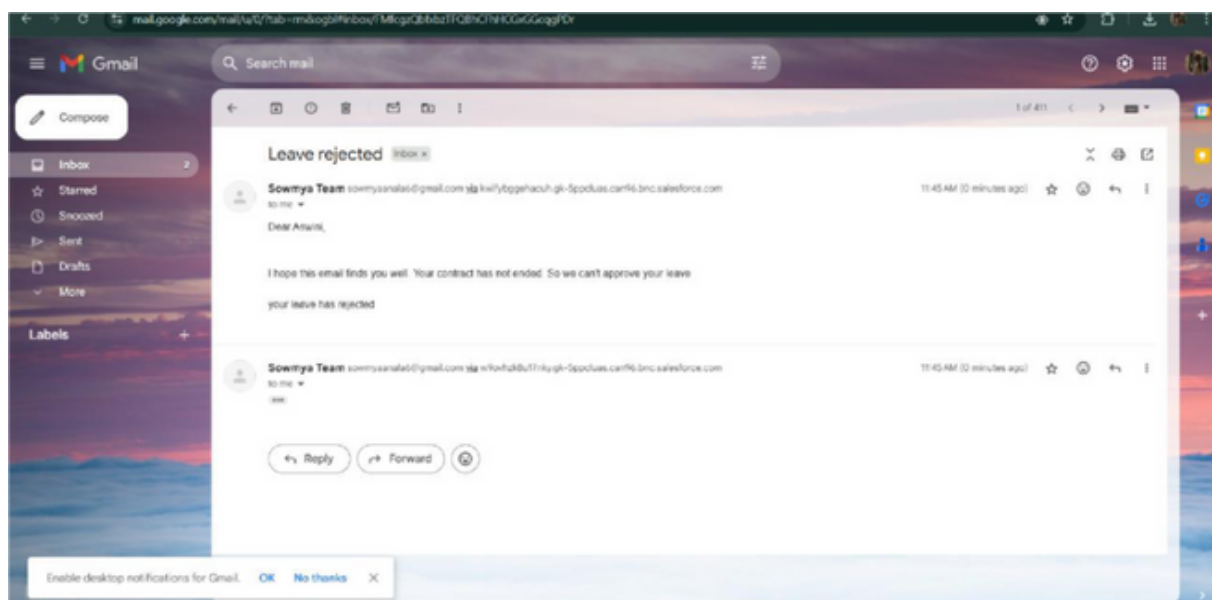
■ Request for approve the leave



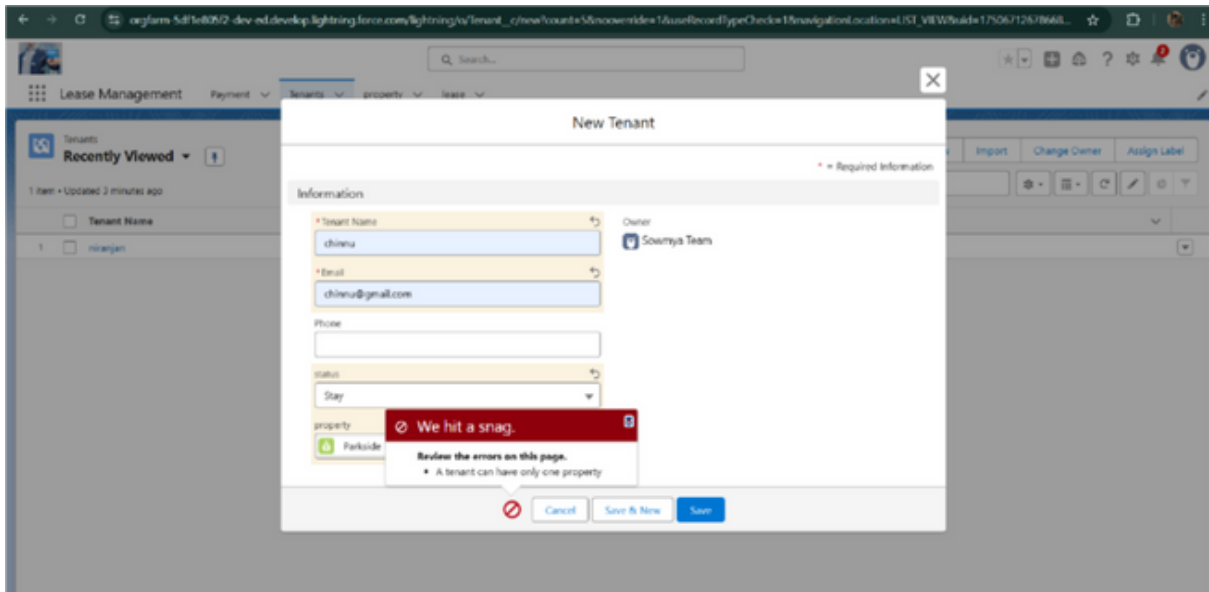


■ Leave rejected





- Trigger error messages



- Approval process notifications

ADVANTAGE

Lower Upfront Costs: Leasing eliminates large capital expenditures, allowing businesses to preserve cash for other needs.

Flexibility: Businesses can easily upgrade assets at the end of a lease term helping to avoid obsolescence.

Tax Benefits: Lease payments are often deductible as operating expenses, providing a tax advantage for the lessee.

DISADVANTAGE

Higher Long-Term Costs: While initial costs are lower, the total cost of leasing can be higher than buying over the asset's lifespan.

No Ownership Equity: At the end of the lease, lessees do not gain ownership of the asset, and their payments do not build equity.

Restrictions: Leased assets often come with limitations, such as mileage caps for vehicles or restrictions on customization.

CONCLUSION

Summary of Achievements

The Salesforce implementation for Lease Management has successfully streamlined and automated critical aspects of the leasing lifecycle. Key accomplishments include:

1. Comprehensive Lease Lifecycle Management

- Implemented a robust system to manage lease agreements, from creation and amendments to renewals and terminations.

1. Automated Payment Processes

- Enabled scheduled rent tracking, payment reminders, and overdue alerts, reducing manual oversight and improving cash flow management.

1. Efficient Expiration and Renewal Workflows

- Automated notifications and streamlined renewal processes, ensuring timely follow-ups and improved lease retention rates.

1. Enhanced Property and Tenant Management

- Centralized information for properties, units, and tenants, improving operational visibility and collaboration.

1. Actionable Insights and Reporting

- Delivered custom reports and dashboards to monitor revenue, lease performance, and occupancy metrics, supporting data-driven decision-making.

1. Improved User Experience

- Provided intuitive interfaces and mobile accessibility for leasing agents, property managers, and tenants, enhancing productivity and satisfaction.

1. Secure and Scalable Solution

- Ensured role-based access, field-level security, and compliance with legal requirements, enabling a reliable and scalable system for lease management.

1. Integration with External Systems

- Established seamless connections with payment gateways and accounting systems for end-to-end process automation.

REFERENCE

1. International Journal of Advanced Research in Science, Communication and Technology (IJARSCT): <https://ijarsct.co.in/Paper7646.pdf>.
1. Lease-Management-System-on-Salesforce: <https://github.com/VedantRajGaur/Lease-Management-System-on-Salesforce>.
1. Github lease Management: https://github.com/mukunthan893/NM_LEASE-MANAGEMENT
1. Salesforce documentation:
Build an Integrated Real Estate CRM for Tenant Management.

APPENDIX

- **Source Code:** Provided in Apex Classes and Triggers

Test.apxt:

```
trigger test on Tenant__c (before insert) { if (trigger.isInsert && trigger.isBefore){  
testHandler.preventInsert(trigger.new);
```

```
}}
```

testHandler.apxc:

```
public class testHandler { public static void preventInsert(List<  
Tenant__c> newList)  
  
{Set<Id>
```

existingPropertyIds

= new Set<Id>()

for (Tenant__c existingTenant : [SELECT Id, Property__c FROM Tenant__c WHERE Property__c != null]) {

existingPropertyIds.add(existingTenant.Property__c;

} for (Tenant__c newTenant :

newlist) {

if (newTenant.Property__c != null && existingPropertyIds.contains(newTenant.Property__c)) {

newTenant.addError('A

tenant can have only one property');

}

}

}

}

MonthlyEmailScheduler.apxc:

global class MonthlyEmailScheduler implements Schedulable { global void execute(SchedulableContext

sc) { Integer currentDay = Date.today().day(); if (currentDay == 1) { sendMonthlyEmails();

}

} public static void sendMonthlyEmails() { List<Tenant__c>

tenants = [SELECT Id, Email__c FROM Tenant__c]; for (Tenant__c tenant :

```
tenants) {
```

```
String recipientEmail = tenant.Email__c;
```

```
String emailContent = 'I trust this email finds you well. I am writing to remind you that the monthly rent is due Your timely payment ensures the smooth functioning of our rental arrangement and helps maintain a positive living environment for all.';
```

```
String emailSubject = 'Reminder: Monthly Rent Payment Due'; Messaging.SingleEmailMessage email = new
```

```
Messaging.SingleEmailMessage(); email.setToAddresses(new String[]{recipientEmail});
```

```
email.setSubject(emailSubject); email.setPlainTextBody(emailContent);
```

```
Messaging.sendEmail(new Messaging.SingleEmailMessage[]{email});
```

```
}
```

```
}
```

```
}
```