

TITLE:LEASE MANAGEMENT

Category: Salesforce developer

Project Description:

A lease management project involves creating a system or application to efficiently handle the processes related to leasing real estate properties, equipment, or other assets. The goal is to streamline and automate various tasks associated with lease agreements, ensuring accurate record-keeping, compliance with regulations, and effective communication between parties involved.

TEAM ID: NM2025TMID02143

Team Size : 4

Team Leader : Krishnarubini C

Team member : Madhavan R

Team member : Kokila S

Team member : Kesavan B

Phase 1: Ideation

Problem Statement:

In real estate and asset management companies, handling Lease agreements, tenant details, payment schedules, and Renewals manually often leads to inefficiency, data loss, and Miscommunication. There is a need for a centralized digital Platform that automates lease tracking, approval processes, And notifications to improve productivity and accuracy.

Proposed Solution:

The Lease Management System built on Salesforce provides a Unified platform to manage leases, tenants, and property details Efficiently. Using Salesforce automation tools Like Flows, Approval Processes, and Email Alerts, the System ensures streamlined lease operations, reduces manual Effort, and provides real-time insights through dashboards and Reports.

Objectives:

- Digitize and automate the entire lease lifecycle—from Creation to renewal.
- Maintain tenant, property, and payment records in one Centralized system.
- Use Salesforce features (objects, triggers, and Automation) to minimize manual tasks.
- Enable managers to approve lease requests through an Automated approval flow.
- Send automatic email notifications for lease expirations And payment reminders.

Key Features / Functionalities:

- Custom Objects: Lease, Tenant, and Property with Defined relationships.
- Validation Rules: Ensure correct lease terms and data

Integrity.

- Approval Process: Automate lease approval and renewal requests.

- Email Alerts: Notify stakeholders about upcoming payments and expirations.

- Flow Automation: Streamline lease creation and update processes.

- Reports & Dashboards: Track active leases, payment status, and renewals.

Expected Outcome:

A fully automated, user-friendly Salesforce app that simplifies lease management operations, enhances transparency, and provides real-time insights for better decision-making.

Phase 2: Requirement Analysis

Milestone 1: Salesforce Account

Introduction:

Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don't know where you should start on your learning journey? If you've answered yes to any of these questions, then you're in the right place. This module is for you.

Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module, we'll take you through these features and answer the question, "What is Salesforce, anyway?".

What Is Salesforce?

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and

customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this:

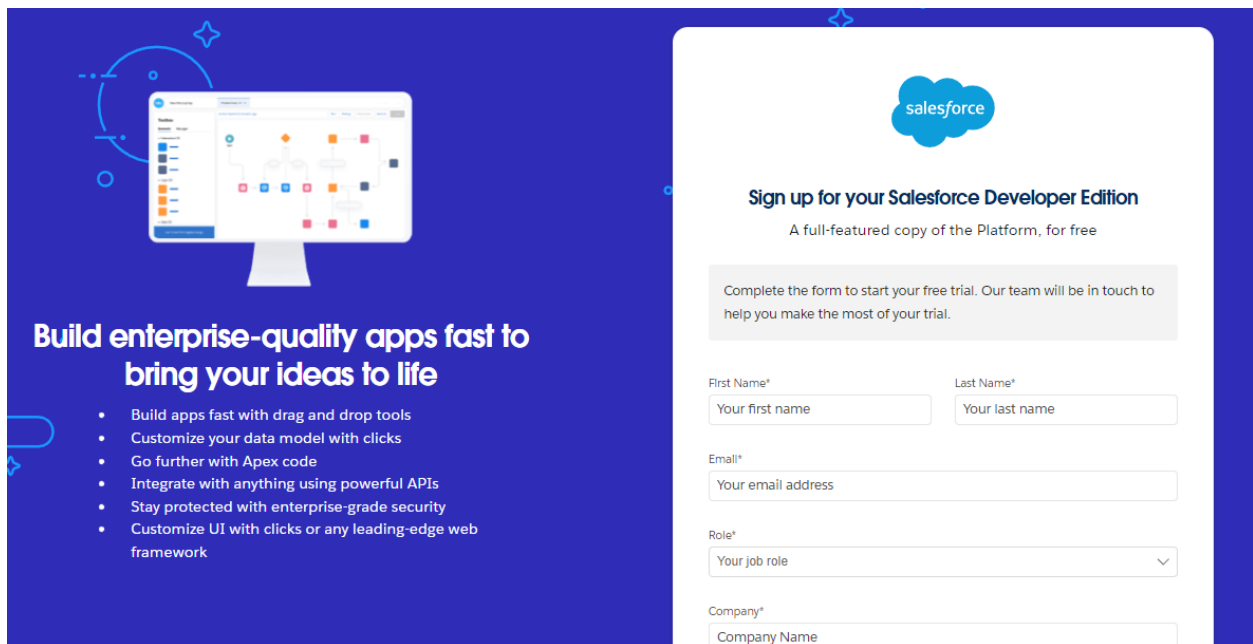
<https://youtu.be/r9EX3IGde5k>

Creating Developer Account:

Creating a developer org in salesforce.

Go to <https://developer.salesforce.com/signup>

On the sign up form, enter the following details :



The image shows the Salesforce Developer Edition sign-up form. On the left, there is a blue banner with a graphic of a computer monitor displaying a flowchart. The text on the banner reads: "Build enterprise-quality apps fast to bring your ideas to life". Below this, there is a list of bullet points: "Build apps fast with drag and drop tools", "Customize your data model with clicks", "Go further with Apex code", "Integrate with anything using powerful APIs", "Stay protected with enterprise-grade security", and "Customize UI with clicks or any leading-edge web framework". On the right, the sign-up form is displayed. It has the Salesforce logo at the top, followed by the heading "Sign up for your Salesforce Developer Edition" and the subtext "A full-featured copy of the Platform, for free". Below this, there is a grey box with the text: "Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial." The form fields are: "First Name*" (with placeholder "Your first name"), "Last Name*" (with placeholder "Your last name"), "Email*" (with placeholder "Your email address"), "Role*" (a dropdown menu with "Your job role" and a downward arrow), and "Company*" (with placeholder "Company Name").

Build enterprise-quality apps fast to bring your ideas to life

- Build apps fast with drag and drop tools
- Customize your data model with clicks
- Go further with Apex code
- Integrate with anything using powerful APIs
- Stay protected with enterprise-grade security
- Customize UI with clicks or any leading-edge web framework

Sign up for your Salesforce Developer Edition
A full-featured copy of the Platform, for free

Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.

First Name*
Your first name

Last Name*
Your last name

Email*
Your email address

Role*
Your job role

Company*
Company Name

First name & Last name

Email

Role : Developer

Company : College Name

County : India

Postal Code : pin code

Username : should be a combination of your name and company

This need not be an actual email id, you can give anything in the format :
username@organization.com

Click on sign me up after filling these.

1.Click on Verify Account

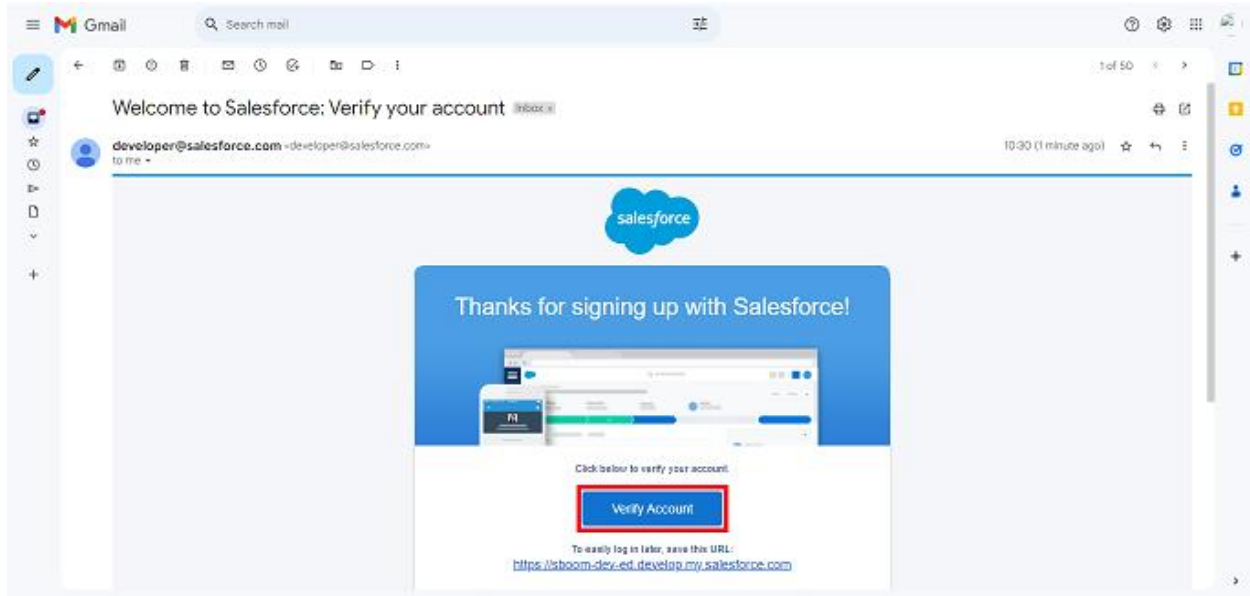
2.Give a password and answer a security question and click on change password.

3.Give a password and answer a security question and click on change password.

4.Then you will redirect to your salesforce setup page.

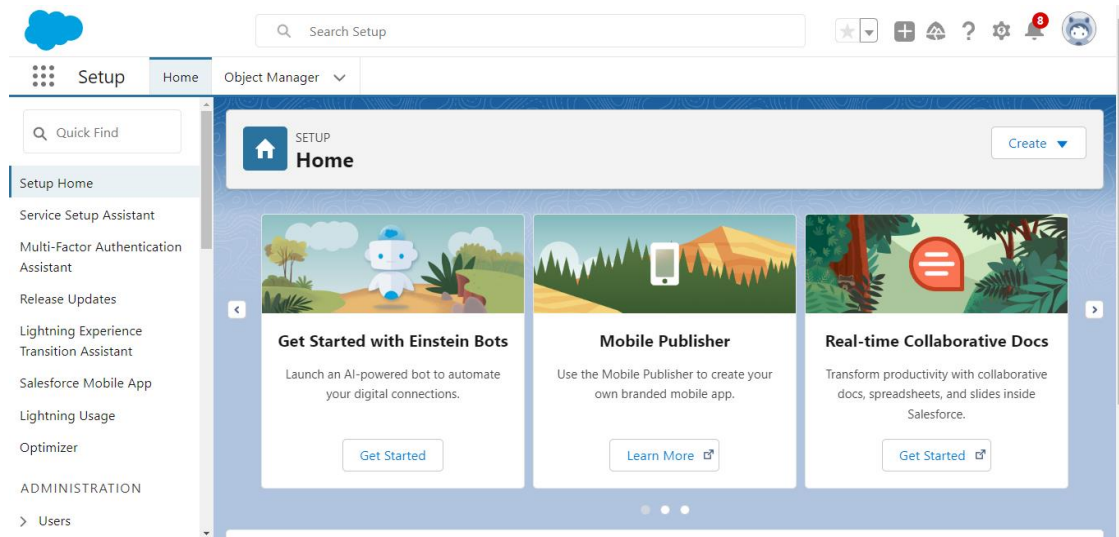
Account Activation:

1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.

A screenshot of the 'Change Your Password' form. The form is titled 'Change Your Password' and asks to enter a new password for 'lead@sb.oom'. It lists requirements: 8 characters, 1 letter, and 1 number. The 'New Password' and 'Confirm New Password' fields are highlighted with a red box. The 'Security Question' is 'In what city were you born?' and the 'Answer' is 'asdfghjkl'. The 'Change Password' button is also highlighted with a red box.

1. Click on Verify Account
2. Give a password and answer a security question and click on change password.

3. Give a password and answer a security question and click on change password.
4. Then you will redirect to your salesforce setup page.



Object

What Is an Object?

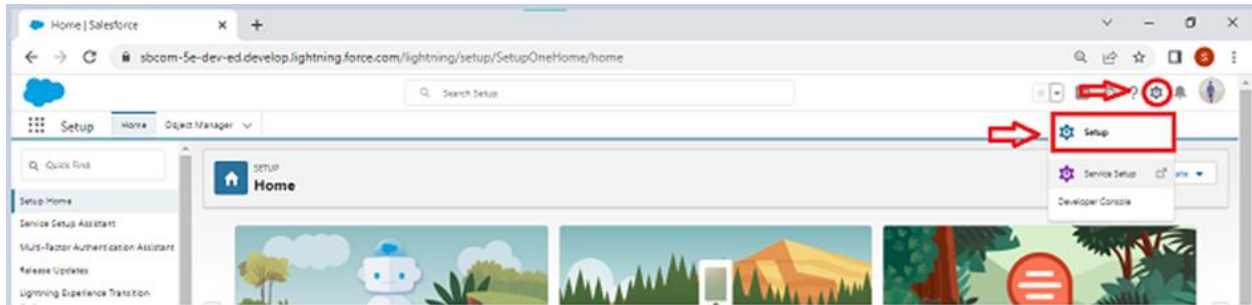
Salesforce objects are database tables that permit you to store data that is specific to an organization. What are the types of Salesforce objects

Salesforce objects are of two types:

1. **Standard Objects:** Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.

2. Custom Objects: Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

To Navigate to Setup page:



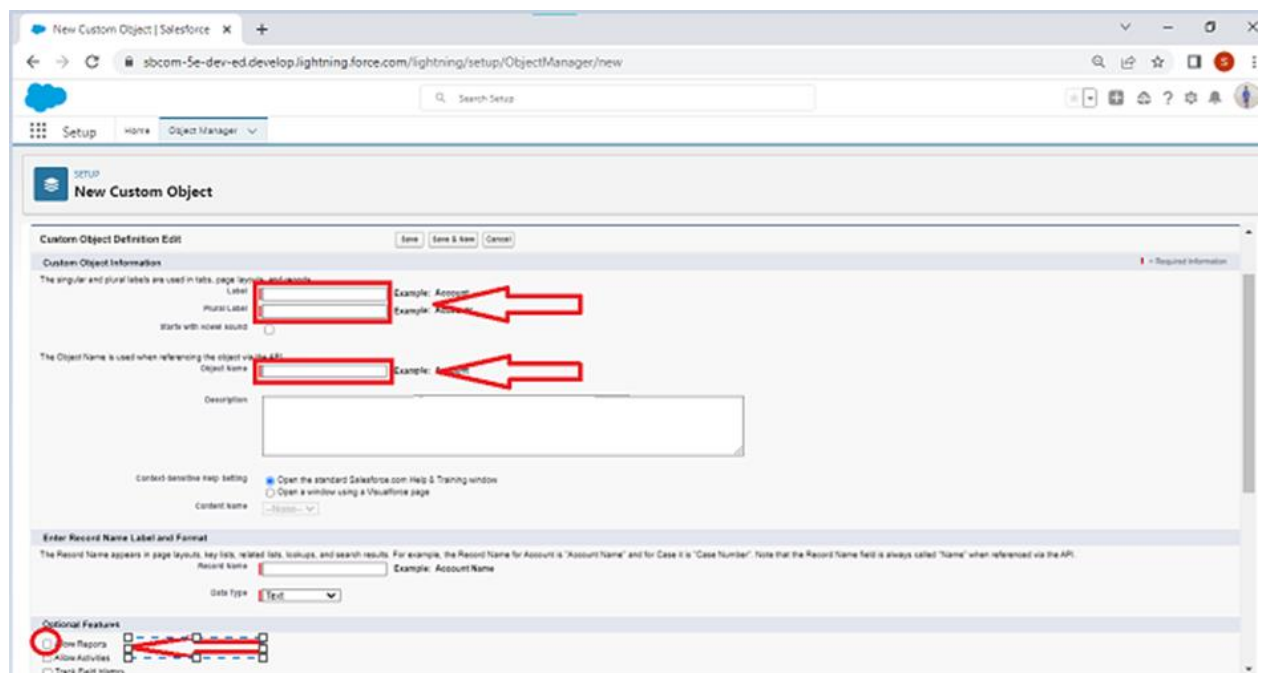
To create an object:

1. From the setup page ? Click on Object Manager ? Click on Create ? Click on Custom Object.



2. On Custom object defining page:

3. Enter the label name, plural label name, click on Allow reports, Allow search.



4.Click on Save.

Tabs

What is Tab : A tab is like a user interface that is used to build records for objects and to view the records in the objects.

Types of Tabs:

1. Custom Tabs

Custom object tabs are the user interface for custom applications that you build in salesforce.com. They look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.

2. Web Tabs Web Tabs are custom tabs that display web content or applications embedded in the salesforce.com window. Web tabs make it easier for your users to quickly access content and applications they frequently use without leaving the salesforce.com application.

1. Visualforce Tabs

Visualforce Tabs are custom tabs that display a Visualforce page. Visualforce tabs look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.

2. Lightning Component Tabs

Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app.

3. Lightning Page Tabs

Lightning Page Tabs let you add Lightning Pages to the mobile app navigation menu.

Lightning Page tabs don't work like other custom tabs. Once created, they don't show up on the All Tabs page when you click the Plus icon that appears to the right of your current tabs. Lightning Page tabs also don't show up in the Available Tabs list when you customize the tabs for your apps.

Creating a Custom Tab

To create a Tab (Property)

Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)

3.Click save

Creating Remaining Tabs

Now create the Tabs for the remaining Objects, they are “Payment for tenant,lease,tenant”.

Follow the same steps as mentioned in Activity -1 .

The Lightning App

Lightning apps gives users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

Lightning apps let you brand your apps with a custom color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your org can work more efficiently by easily switching between apps.

Use Case:

Well done you have reached close to your requirement by creating the objects to store the organisation’s data. Making a database for an organisation is just not enough to reach out the requirements, the task is how the users at the organisation can access the objects you have created for them. As an Admin for the organisation it’s your duty to make sure every user of the organisation is able to access the data modelling structure.

Create a Lightning App

To create a lightning app page:

Go to setup page >> search “app manager” in quick find >> select “app manager” >> click on New lightning App.

The screenshot shows the Salesforce Lightning Experience App Manager setup page. The page has a header with 'App Manager | Salesforce' and a search bar. Below the header, there is a 'Setup' button and a 'Home' button. The main content area is titled 'Lightning Experience App Manager' and includes a 'New Lightning App' button. Below this, there is a 'Clone App (Beta)' section with a toggle for 'Enable App Cloning'. At the bottom, there is a table of existing apps.

App Name	Developer Name	Description	Last Modified	App Type	VL
1. All Tabs	AppFolio		04/12/2022, 10:13 am	Classic	
2. Analytics Studio	Insights	Build CRM Analytics dashboards and apps	04/12/2022, 10:13 am	Classic	✓
3. App Launcher	AppLauncher	App Launcher tabs	04/12/2022, 10:13 am	Classic	✓
4. Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	04/12/2022, 10:16 am	Lightning	✓
5. Chatter Desktop	Chatter Desktop	Chatter Desktop is an Adobe AIR-based desktop application that lets Chatter users stay connecte...	23/12/2022, 4:04 pm	Connected (Managed)	
6. Chatter Mobile for BlackBerry	Chatter_for_BlackBerry	The Salesforce.com Chatter Mobile app lets you access Chatter data on the go. Use it to view fee...	23/12/2022, 4:05 pm	Connected (Managed)	
7. College Management System	Radstem	demo app	08/12/2022, 4:16 pm	Lightning	✓
8. Community	Community	Salesforce CRM Communities	04/12/2022, 10:13 am	Classic	✓
9. Content	Content	Salesforce CRM Content	04/12/2022, 10:13 am	Classic	✓
10. Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	04/12/2022, 10:13 am	Lightning	✓

Fill the app name in app details and branding as follow

App Name : Lease Management Developer Name : This will auto populated Image : optional (if you want to give any image you can otherwise not mandatory) Primary colour hex value : keep this default.
3. Then click Next >> (App option page) Set Navigation Style as Standard Navigation >> Next.

New Lightning App

App Options

Navigation and Form Factor 1

*** Navigation Style**

☒ Standard navigation

☐ Console navigation

*** Supported Form Factors**

☒ Desktop and phone

☐ Desktop

☐ Phone

Setup and Personalization 1

Setup Experience

☒ Setup (full set of Setup options)

☐ Service Setup

App Personalization Settings

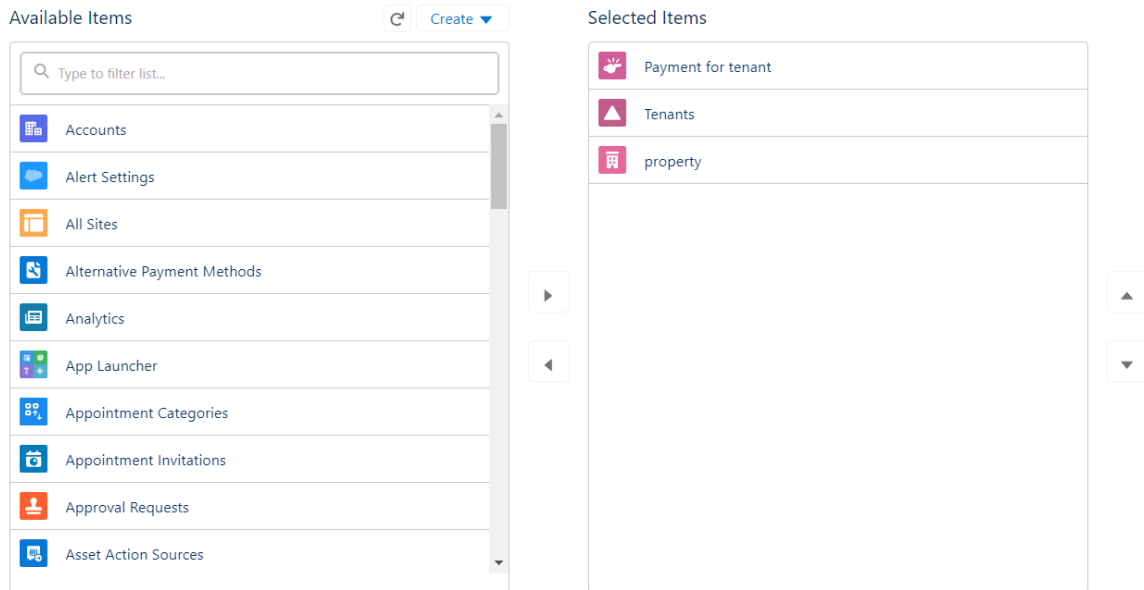
☐ Disable end user personalization of nav items in this app

☐ Disable temporary tabs for items outside of this app

Back Next

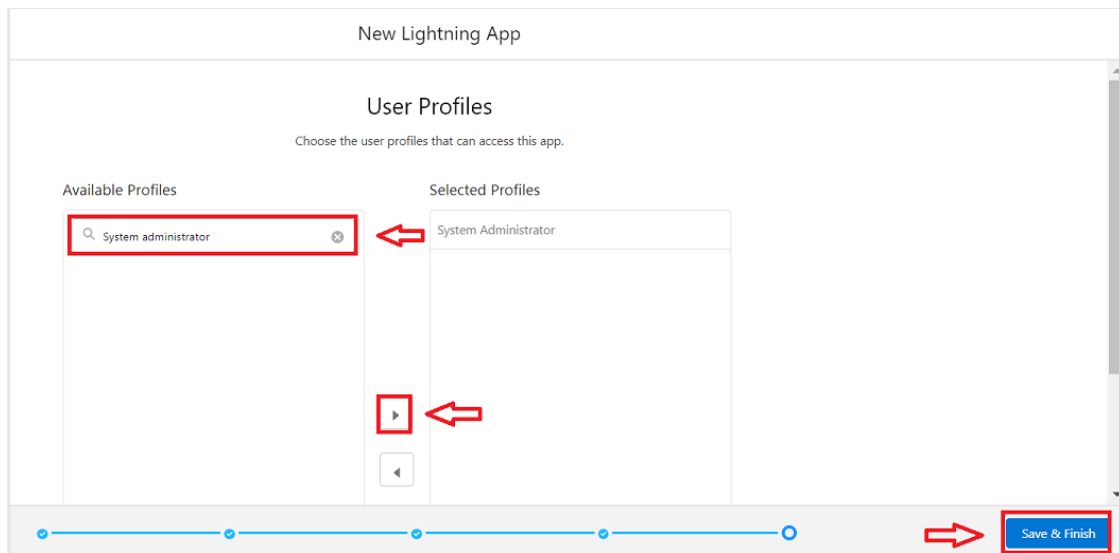
Item	Label	Description	Created	App
12	Queue Management	QueueManagement	Create and manage queues for your business.	22/08/2023, 12:06 pm
13	Sales	Sales	The world's most popular sales force automation (SFA) solution	22/08/2023, 12:06 pm

(Utility Items) keep it as default >> Next.
5. To Add Navigation Items:



Search for the item in the (Payment for tenant, Tenants,property,lease) from the search bar and move it using the arrow button ? Next? Next.

6. To Add User Profiles:



Search profiles (System administrator) in the search bar >>click on the arrow button >> save & finish.

Fields

When we talk about Salesforce, Fields represent the data stored in the columns of a relational database. It can also hold any valuable information that you require for a specific object. Hence, the overall searching, deletion, and editing of the records become simpler and quicker.

Types of Fields

1. Standard Fields

2. Custom Fields

Standard Fields:

As the name suggests, the Standard Fields are the predefined fields in Salesforce that perform a standard task. The main point is that you can't simply delete a Standard Field until it is a non-required standard field. Otherwise, users have the option to delete them at any point from the application freely. Moreover, we have some fields that you will find common in every Salesforce application. They are,

>>Created By

>>Owner

>>Last Modified

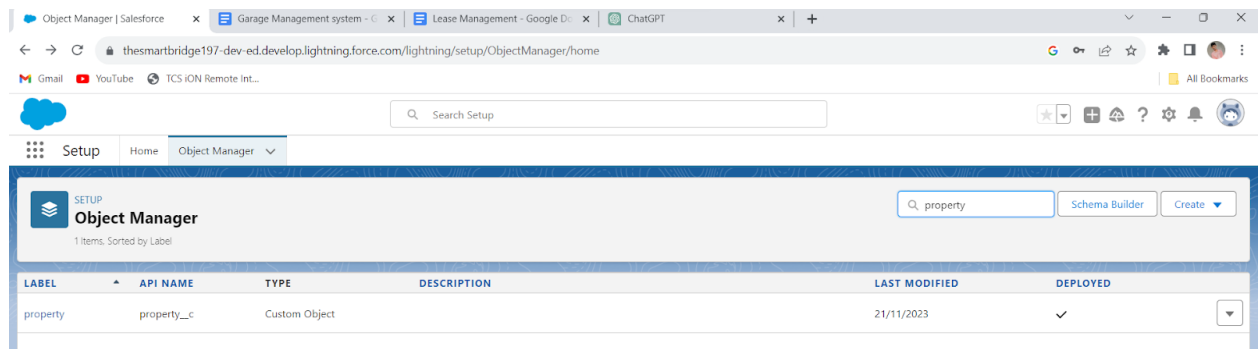
>> Field Made During object Creation

Custom Fields:

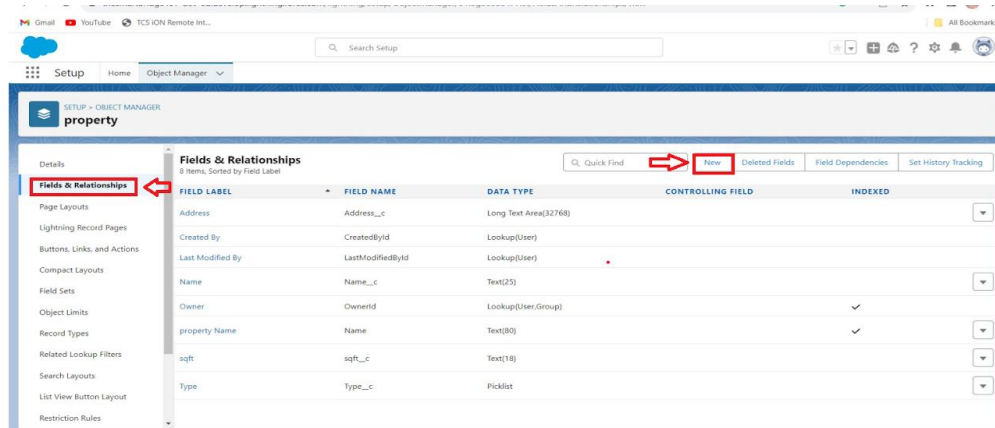
On the other side of the coin, Custom Fields are highly flexible, and users can change them according to requirements. Moreover, each organizer or company can use them if necessary. It means you need not always include them in the records, unlike Standard fields. Hence, the final decision depends on the user, and he can add/remove Custom Fields of any given form.

Creation of fields for the property object
To create fields in an object:

1.Go to setup >> click on Object Manager >> type object name(property) in search bar >>click on the object.



2.Now click on “Fields & Relationships” >> New



3. Select Data Type as a "Text"

Setup Home Object Manager

Search Setup

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

- ☐ **Use**
- ☐ **Date/Time**
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.
- ☐ **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.
- ☐ **Number**
Allows users to enter any number. Leading zeros are removed.
- ☐ **Percent**
Allows users to enter a percentage number, for example, "10" and automatically adds the percent sign to the number.
- ☐ **Phone**
Allows users to enter any phone number. Automatically formats it as a phone number.
- ☐ **Picklist**
Allows users to select a value from a list you define.
- ☐ **Picklist (Multi-Select)**
Allows users to select multiple values from a list you define.
- ☒ **Text**
Allows users to enter any combination of letters and numbers.
- ☐ **Text Area**
Allows users to enter up to 255 characters on separate lines.
- ☐ **Text Area (Long)**
Allows users to enter up to 131,072 characters on separate lines.
- ☐ **Text Area (Rich)**
Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
- ☐ **Text (Encrypted)**
Allows users to enter any combination of letters and numbers and store them in encrypted form.
- ☐ **Time**
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.
- ☐ **URL**
Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

4.Click on next

Setup Home Object Manager

SETUP > OBJECT MANAGER
property

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Step 2: Enter the details Step 2 of 4

Previous Next Cancel

Field Label Name

Length 25

Field Name Name

Description

Help Text

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

Unique ☐ Do not allow duplicate values

☐ Treat "ABC" and "abc" as duplicate values (case insensitive)

☐ Treat "ABC" and "abc" as different values (case sensitive)

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

. Fill the Above as following:

- Field Label: Name
- Field Name : gets auto generated
- Length : 25
- Required :check box
- Click on Next >> Next >> Save and new.

2. To create another fields in an object:

1. Go to setup >> click on Object Manager >>type object name(property) in search bar >>click on the object.
2. Now click on “Fields & Relationships” >>New
3. Select Data type as a “Long Text” and Click on Next
4. Fill the Above as following:
 - Field Label : Address
 - Field Name : gets auto generated
 - Click on Next >> Next >> Save and new.

3. To create another fields in an object:

5. Go to setup >> click on Object Manager >> type object name(property) in search bar >> click on the object.
6. Now click on "Fields & Relationships" >> New
7. Select Data type as a "picklist" and Click on Next
8. Fill the Above as following:
 - Field Label : Type
 - Field Name : gets auto generated
 - Enter values, with each value separated by a new line
 - Enter these values
1BHK
2BHK
3BHK
 - Click on Next >> Next >> Save and new.

To create another fields in an object:

9. Go to setup >> click on Object Manager >> type object name(property) in search bar >> click on the object.
10. Now click on "Fields & Relationships" >> New
11. Select Data type as a "Text" and Click on Next
12. Fill the Above as following:
 - Field Label : sqft
 - Field Name : gets auto generated
 - Length : 18
 - Click on Next >> Next >> Save.

Creation of fields for the Tenant object

1. Go to setup >> click on Object Manager >> type object name(Tenant) in search bar >> click on the object.
2. Now click on "Fields & Relationships" >> New
3. Select Data type as a "Email" and Click on Next
4. Fill the Above as following:
 - Field Label : Email
 - Field Name : gets auto generated
 - Click on required check box
 - Click on Next >> Next >> Save and new.

To create another fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Tenant) in search bar >> click on the object.
2. Now click on "Fields & Relationships" >> New
3. Select Data type as a "phone" and Click on Next
4. Fill the Above as following:
 - Field Label : Phone
 - Field Name : gets auto generated
 - Click on Next >> Next >> Save and new.

To create another fields in an object:

5. Go to setup >> click on Object Manager >> type object name(Tenant) in search bar >> click on the object.
6. Now click on "Fields & Relationships" >>New
7. Select Data type as a "picklist" and Click on Next
8. Fill the Above as following:
 - Field Label : status
 - Field Name : gets auto generated
 - Enter values, with each value separated by a new line
 - Enter these values

Stay
Leaving
- Click on Next >> Next >> Save

Creation of fields for the Lease object

- 1.Go to setup >> click on Object Manager >> type object name(Lease) in search bar >> click on the object.
2. Now click on "Fields & Relationships" >> New
3. Select Data type as a "Date" and Click on Next
4. Fill the Above as following:
 - Field Label : start date

- Field Name : gets auto generated
- Click on Next >> Next >> Save and new.

To create another fields in an object:

1.Go to setup >> click on Object Manager >> type object name(Lease) in search bar >> click on the object.

2. Now click on “Fields & Relationships” >> New

3. Select Data type as a “Date” and Click on Next

4. Fill the Above as following:

- Field Label : End date
- Field Name : gets auto generated
- Click on Next >> Next >> Save and new.

Creation of fields for the Payment for tenant

object

1.Go to setup >> click on Object Manager >> type object name(Payment for tenant) in search bar >> click on the object.

2. Now click on “Fields & Relationships” >> New

3. Select Data type as a “Date” and Click on Next

4. Fill the Above as following:

- Field Label : Payment date
- Field Name : gets auto generated
- Click on Next >> Next >> Save and new.

To create another fields in an object:

1.Go to setup >> click on Object Manager >> type object name(Payment for tenant) in search bar >> click on the object.

2. Now click on “Fields & Relationships” >> New

3. Select Data type as a “Number” and Click on Next

4. Fill the Above as following:

- Field Label : Amount
- Length : 18

- Field Name : gets auto generated
- Click on Next >> Next >> Save and new.

To create another fields in an object:

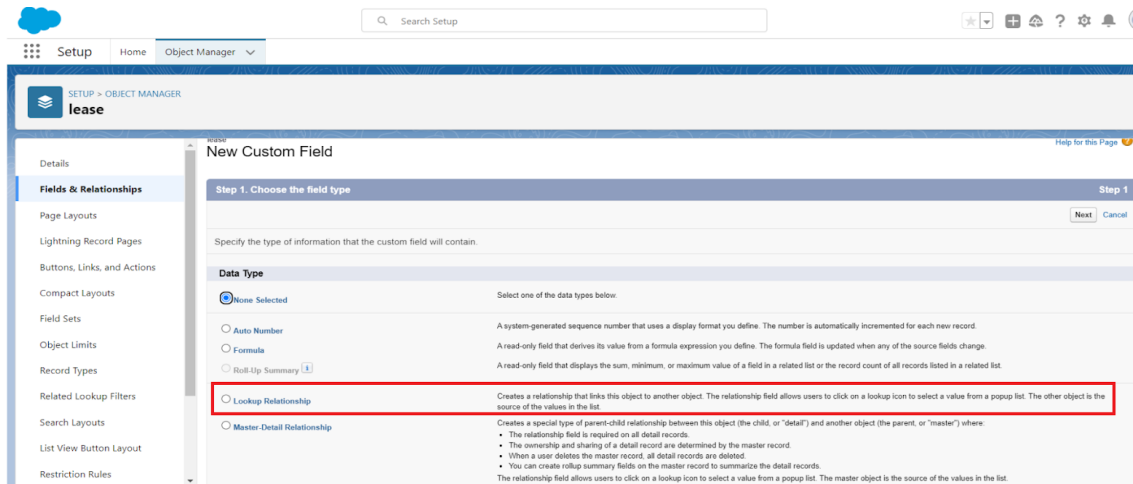
1. Go to setup >> click on Object Manager >> type object name(Payment for tenant) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as a “picklist” and Click on Next
4. Fill the Above as following:

- Field Label : check for payment
- Field Name : gets auto generated
- Enter values, with each value separated by a new line
- Enter these values
Paid
Not paid
- Click on Next >> Next >> Save and new.

Creation of Lookup fields

Creation of Lookup Field on Lease Object :

1. Go to setup>> click on Object Manager >> type object name(Lease) in the search bar >> click on the object.



2. Now click on “Fields & Relationships” >> New
3. Select lookup relationship
4. Select the related object “ property” and click next.
5. Field Name : property
6. Field label : Auto generated
7. Next >> Next >> Save.

Creation of Lookup Field on Payment Object :

8. Go to setup >> click on Object Manager >> type object name(payment) in the search bar >> click on the object.
9. Now click on “Fields & Relationships” >> New
10. Select lookup relationship
11. Select the related object “ Tenant” and click next.
12. Field Name : Tenant
13. Field label : Auto generated
14. Next >> Next >> Save.

Creation of Lookup Field on Payment for tenant Object :

15. Go to setup>> click on Object Manager >> type object name(property) in the search bar >> click on the object.
16. Now click on “Fields & Relationships” >> New
17. Select masterdetail relationship
18. Select the related object “ property” and click next.
19. Field Name : property

20. Field label : Auto generated

21. Next >> Next >> Save.

Validation rule

Validation rules are applied when a user tries to save a record and are used to check if the data meets specified criteria. If the criteria are not met, the validation rule triggers an error message and prevents the user from saving the record until the issues are resolved.

Email Templates

We use email templates to increase productivity and ensure consistent messaging. Email templates with merge fields let you quickly send emails that include field data from Salesforce records like contacts, leads, or opportunities. You can use email templates when emailing groups of people—with list email or mass email—or just one person.

Salesforce email templates are the easiest way to get your emails done. They help you create and send quick emails that include merge fields from Salesforce records like Contacts, Leads, Opportunities, or Custom Objects.

When you have a large number of contacts or leads in Salesforce, it can be difficult to keep track of who needs to be notified about new information. Salesforce email templates allow you to combine all these contacts or leads into one email and then send it out simultaneously.

Create Email Template For Tenant Leaving

To create Email Template:

1. Go to setup in quick find box enter email template >> click on classic Email Template.

2. Click on >> New Email Template====>Choose text

Folder : Unfiled public Classic Email templates

Click on available for use

3. Email Template Name is
“tenant leaving”

4. Template Unique Name : Auto populated

5. Subject : " request for approve the leave"

6. Email body :

Dear {!Tenant__c.CreatedBy},

Please approve my leave

7. Save

Create Email Template For Leave Approved

To create Email Template:

1. Go to setup in quick find box enter email template >> click on classic Email Template.

2. Click on >> New Email Template====>Choose text

Folder : Unfiled public Classic Email templates

Click on available for use

3. Email Template Name is “Leave approved”

4. Template Unique Name : Auto populated

5. Subject : " Leave approved"

6. Email body :

dear{!Tenant__c.Name},

I hope this message finds you well. I am writing to inform you that I have received your email confirming the approval of my leave request. I would like to express my gratitude for considering and approving my time off.

your leave is approved. You can leave now

7. Save

Create Email Template For rejection for leave

To create Email Template:

1. Go to setup in quick find box enter email template >> click on classic Email Template.

2. Click on >>New Email Template==>Choose text

Folder : Unfiled public Classic Email templates

Click on available for use

3. Email Template Name is “Leave rejected”

4. Template Unique Name : Auto populated

5. Subject : " Leave rejected"

6. Email body :

Dear {!Tenant__c.Name},

I hope this email finds you well. Your contract has not ended. So we can't approve your leave

your leave has rejected

7. Save

Create Email Template For Monthly payment

To create Email Template:

1. Go to setup in quick find box enter email template >> click on classic Email Template.

2. Click on >> New Email Template====>Choose text

Folder : Unfiled public Classic Email templates
Click on available for use

3. Email Template Name is
“Tenant Email”

4. Template Unique Name : Auto populated

5. Subject : " Urgent: Monthly Rent Payment Reminder"

6. Email body :

Dear {!Tenant__c.Name},

I trust this email finds you well. We appreciate your continued tenancy at our property and I hope you have been comfortable in your residence.

This communication is a friendly reminder regarding your monthly rent payment, which is currently outstanding. As outlined in our rental agreement, the payment is due . To ensure the smooth operation of our property management and to avoid any inconvenience, we kindly request you to settle the payment at your earliest convenience.

7. Save

Create Email Template For successful payment

To create Email Template:

1. Go to setup in quick find box enter email template >> click on classic Email Template.

2. Click on >> New Email Template====>Choose text

Folder : Unfiled public Classic Email templates
Click on available for use

3. Email Template Name is
“tenant payment”

4. Template Unique Name : Auto populated

5. Subject : " Confirmation of Successful Monthly Payment"

6. Email body :

Dear {!Tenant__c.Email__c},

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

7. Save

Approval Process

What Is Approval Process In Salesforce?

The Approval Process is an automated process that an org uses to approve records in Salesforce. For example, When In the organization, someone is not able to decide a particular thing then he can ask someone else for approval. So, for such frequent cases or situations, one can define the approval process. So, Users can take benefit of such an approval process whenever needed.

Records submitted for approval are approved by the user(s) in the organization. These users are called Approvers. A single Approval process is bound to a single object because when a rule is defined, this object influences the fields that will be available to set the criteria.

An approval process consists of finalizing the basic properties of the approval process (as shown in the below image), approval steps, and actions to be executed.

Actions In Salesforce Approval Process

There are 4 actions present except the approval steps which complete an approval process, following are:

1. Initial Submission Actions

Initial submission actions are the actions that occur when a user first submits a record for approval. By default, an action to lock the record runs automatically on initial submission. Initial submission actions can include any approval actions such as email alerts, field updates, tasks, or outbound messages.

2. Final Approval Actions

Final Approval actions are the actions that occur when a record is approved from all the approval steps. It also locks or unlocks the record, as specified. It can include any approval actions such as email alerts, field updates, tasks, or outbound messages.

3. Final Rejection Actions

Final Rejection actions are the actions that occur when a record is rejected from any of the approval steps. It also locks or unlocks the record, as specified. It can include any approval actions such as email alerts, field updates, tasks, or outbound messages.

4. Recall Actions

Recall actions are the actions that occur when a record is recalled after submission for approval. It can include any approval actions such as email alerts, field updates, tasks, or outbound messages.

Apex Trigger

Use case:

The tenant and property are in a master-detail relationship, wherein each tenant is associated with only one property. When a tenant attempts to create a new record with an existing property, an error should be displayed, indicating that a tenant can have only one property.

Write a code to achieve this requirement using Salesforce developer skills to fulfill the Managers requirement.

FLOWS

What is a flow ?

In Salesforce, a flow is a tool that automates complex business processes. Simply put, it collects data and then does something with that data. Flow Builder is the declarative interface used to build individual flows.

Flows fall into five categories:

Screen Flows: These are flows that have a UI element and require input from users.

These types of flows are either launched as an action or embedded as an element on a Lightning page.

Schedule-Triggered Flows: These autolaunched flows launch at a specified time and frequency for each record in a batch, and they run in the background.

Autolaunched Flows: Run automated tasks with this flow type. Autolaunched flows can be invoked from other flows (subflow), process builder, from within an Apex class, from a set schedule, from record changes, or from platform events.

Record-Triggered Flows: These autolaunched flows run in the background either before a record save or after the record is saved when a record is created, updated, or deleted.

Platform Event-Triggered Flows: When a platform event message is received, these autolaunched flows run in the background.

When and why should we use a flow

If you need to generate a new automated business process, or user guided experience that does not reach the complexity threshold for Apex Code, then flow is your go-to tool.

If you are modifying an existing process that was built with Process Builder or workflow, then you should consider a number of factors when deciding whether to modify the existing process or migrate it to Flow. Flows are able to create, edit, and delete records in Salesforce, send emails, show relevant data and gather input from users, and generate outbound messages.

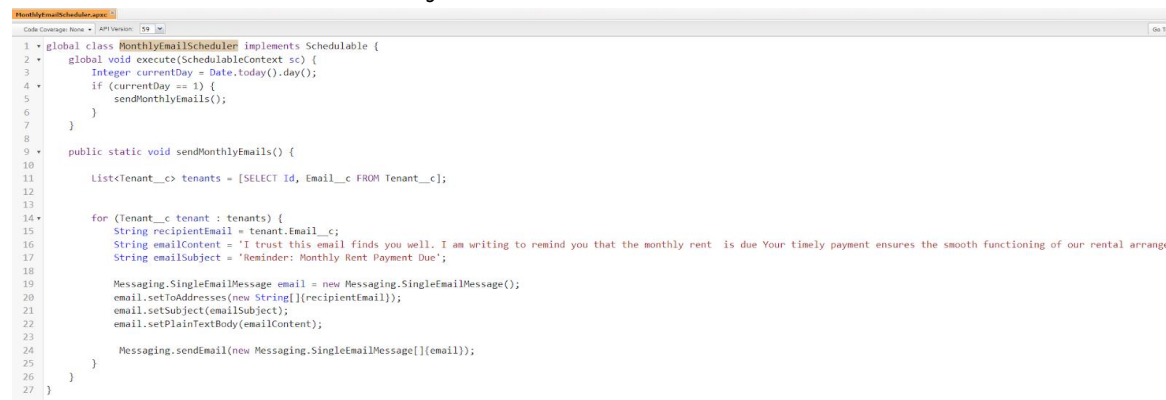
Schedule class :

Create an Apex Class

1. To create a new Apex Class follow the below steps:

Click on the file >> New >> Apex Class.

2. Enter class name as MonthlyEmailScheduler.



```
1 global class MonthlyEmailScheduler implements Schedulable {
2     global void execute(SchedulableContext sc) {
3         Integer currentDay = Date.today().day();
4         if (currentDay == 1) {
5             sendMonthlyEmails();
6         }
7     }
8
9     public static void sendMonthlyEmails() {
10
11         List<Tenant__c> tenants = [SELECT Id, Email__c FROM Tenant__c];
12
13
14         for (Tenant__c tenant : tenants) {
15             String recipientEmail = tenant.Email__c;
16             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';
17             String emailSubject = 'Reminder: Monthly Rent Payment Due';
18
19             Messaging.SingleEmailMessage email = new Messaging.SingleEmailMessage();
20             email.setToAddresses(new String[]{recipientEmail});
21             email.setSubject(emailSubject);
22             email.setPlainTextBody(emailContent);
23
24             Messaging.sendEmail(new Messaging.SingleEmailMessage[]{email});
25         }
26     }
27 }
```

Apex logic:

```
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});
    }
}
}

```

Save the code.

Schedule Apex class

1. Enter Apex class in quick find box
2. Select schedule Apex

Q. apex class

Custom Code

Apex Classes

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

Apex Classes

Apex Code is an object oriented programming language that allows developers to develop on-demand business applications on the Lightning Platform.

Percent of Apex Used: 0.07%
You are currently using 4,018 characters of Apex Code (excluding comments and @isTest annotated classes) in your organization, out of an allowed limit of 6,000,000 characters. Note that the amount in use includes both Apex Classes and Triggers defined in your organization.

Estimate your organization's code coverage [\[x\]](#)
Compile all classes [\[x\]](#)
View: [\[All\]](#) [\[x\]](#) Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other [\[All\]](#)

Action	Name	Namespace Prefix	Api Version	Status	Size Without Comments	Last Modified By	Has Trace Flags
Edit Del Security	ContactCreator		59.0	Active	616	Manne.Niranan.Reddy, 29/11/2023, 3:02 pm	<input type="checkbox"/>
Edit Del Security	createAccount		59.0	Active	447	Manne.Niranan.Reddy, 29/11/2023, 1:17 pm	<input type="checkbox"/>
Edit Del Security	MonthlyEmailScheduler		59.0	Active	1,125	Manne.Niranan.Reddy, 02/12/2023, 9:53 am	<input type="checkbox"/>
Edit Del Security	testHandler		59.0	Active	584	Manne.Niranan.Reddy, 27/11/2023, 11:20 am	<input type="checkbox"/>

- Enter job Name : MonthlyEmailScheduler
- Apex class : MonthlyEmailScheduler
- Frequency : Monthly==>select on day 1
- Start date : 04/12/2023
- End date : 04/01/2024
- Preferred start time : 09:00 am
- save

Schedule Apex

Schedule an Apex class that implements the 'Schedulable' interface to be automatically executed on a weekly or monthly interval.

Save Cancel

Job Name

Apex Class

Schedule Apex Execution

Frequency ☐ Weekly ☒ Monthly

☒ On day of every month ☐ On the 1st of every month

Start

End

Preferred Start Time

Exact start time will depend on job queue activity.

Save Cancel

Testing the approval process

Tenant
Niranjan

New Contact
New Case
New Lead

Related
Details

Tenant Name

Niranjan

Phone

Email

niranjareddymanne2507@gmail.com

status

stay

property

Manne Residency

Created By

Manne Niranjana Reddy, 29/11/2023, 10:07 am

Last Modified By

Manne Niranjana Reddy, 05/12/2023, 10:18 am

Activity

Calendar icon

Calendar icon

Calendar icon

Calendar icon

Filters: All time • All acti

Refresh

Submit for Approval

Delete

Printable View

Edit

Clone

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.

Enter any comment and click on submit

Submit for Approval

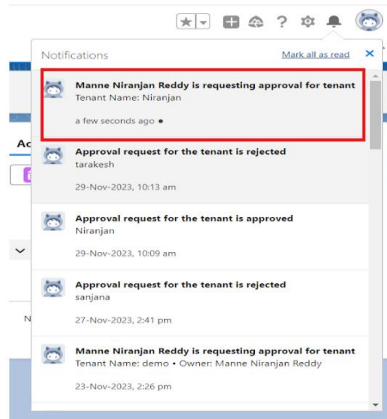
Comments

Leaving

Cancel

Submit

Manne Niranjana Reddy, 05/12/2023, 10:18 am



Click on that notification

Approval Request

Tenant Approval

Pending

Approve

Reject

Reassign

Submitter	Date Submitted	Actual Approver	Assigned To
Manne Niranjana Reddy	05-Dec-2023	Manne Niranjana Reddy	Manne Niranjana Reddy

Details

Approval Details

Tenant Name

Niranjana

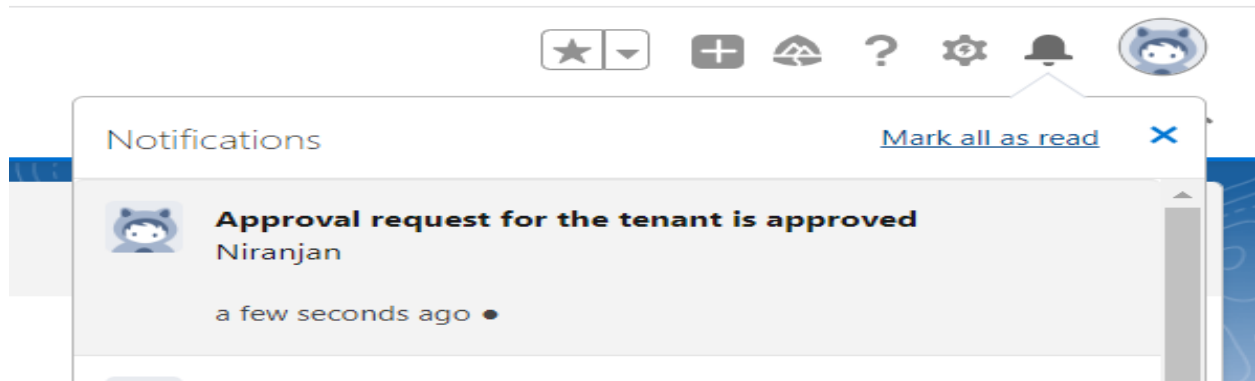
Submitter Comments

Manne Niranjana Reddy

Leaving

05-Dec-2023, 10:22:01 am

click on approve
Give any comment and submit



You will find notification like this and you will get an email check
Note: similarly do for reject also you will get mail and notification

