Project Title: Lease Management

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Project Overview:

The **Lease Management App in Salesforce** aims to provide a comprehensive solution for managing leases, tenants, properties, and payments within a centralized platform. This app will streamline lease lifecycle management, automate key processes, and offer real-time tracking of leases and payments, improving operational efficiency and reducing administrative overhead.

Key features include:

- **Lease Tracking**: Store and manage lease details, including terms, renewal options, and key dates.
- **Tenant & Property Management**: Centralize tenant and property information for easier access and management.
- **Payment Tracking**: Monitor lease payments, overdue amounts, and generate invoices or receipts.
- **Lease Renewals & Extensions**: Automate lease renewal reminders and track extensions.
- **Reports & Dashboards**: Provide insights into lease performance, occupancy rates, payment histories, and other key metrics.
- **Automation**: Automate tasks such as payment reminders, renewal notices, and approval workflows.

Objectives:

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Salesforce Key Features and Concepts Utilized :

1. **Custom Objects & Fields**:
   - **Custom Objects**: To store and manage lease-specific data such as **Lease Agreements**, **Tenants**, **Properties**, **Payments**, and **Renewals**. These custom objects will enable structured data storage that's specific to the lease management process.
   - **Custom Fields**: Added to these objects to capture specific lease-related information such as **lease terms**, **payment amounts**, **start/end dates**, **tenant contacts**, and **property details**.
2. **Salesforce Lightning Experience**:
   - **User Interface (UI)**: A modern, user-friendly interface designed for seamless navigation and interaction with the lease data. It supports custom pages and components that can be tailored to the needs of different user roles, such as property managers or finance teams.
3. **Automation Tools**:
   - **Salesforce Flow**: Automates business processes and workflows, such as sending **payment reminders**, **lease renewal notifications**, or **creating tasks** for overdue leases or payments. Flows can be triggered

based on events like approaching lease expiration dates.

- **Process Builder**: Automates simple workflows like creating records, sending notifications, or updating fields (e.g., changing the lease status when a payment is received).
- **Scheduled Flows**: Set up scheduled tasks or reminders to alert property managers about lease expiration, renewal opportunities, or overdue payments.

4. **Reports & Dashboards**:
   - **Custom Reports**: To provide stakeholders with insights into key metrics, including **lease performance**, **payment status**, **tenant information**, and **property utilization**. These reports help in monitoring lease agreements, revenue collection, and other critical performance indicators.
   - **Dashboards**: Interactive visualizations that consolidate key metrics from different reports. Dashboards can display real-time data on **overdue payments**, **lease renewals**, and **property occupancy**, helping managers make data-driven decisions.
5. **Salesforce AppExchange** (Optional Integrations):
   - Integration with third-party applications available on the **AppExchange** for advanced functionalities, such as **e-signatures** (for lease signing), **payment**

gateway integrations (for processing rent payments), or **document management** (for storing lease contracts and legal documents).

6. **Security & Sharing Rules**:
   - **Profiles & Permission Sets**: To define and control access based on user roles, ensuring that only authorized users (e.g., property managers, accountants) can view or edit sensitive data (like tenant information or payment history).
   - **Sharing Rules**: To control data visibility and access among different teams or individuals in the organization, ensuring that everyone has the appropriate level of access to relevant information.
7. **Chatter (Collaboration Tool)**:
   - **Chatter** is used for internal collaboration, allowing teams to communicate within Salesforce. For example, property managers, legal teams, or accountants can discuss lease issues, renewal terms, and payment statuses directly on the relevant records, improving communication and reducing the need for external emails.
8. **Salesforce Mobile App**:
   - **Mobile Access**: Property managers, field agents, or other users can access lease details and manage tasks via the Salesforce mobile app, ensuring they can manage leases and stay on top of tenant needs while on the go.

9. **Document Management**:

   - **Salesforce Files**: To store and manage documents related to lease agreements, contracts, and other property-related files. These documents can be linked to specific **Lease** or **Tenant** records for easy access.

10. **Email Integration & Alerts**:

- **Email Templates**: Automated email notifications for tenants and property managers, such as **lease renewal reminders**, **payment due notices**, and **late payment alerts**.
- **Email Integration**: Integrated email functionality that enables sending personalized messages directly from Salesforce without leaving the platform.

11. **Salesforce Communities** :

- **Self-Service Portal**: Create a **tenant portal** where tenants can log in, view their lease information, make payments, submit maintenance requests, and track renewal options, all within a branded interface.

12. **Multi-Currency & Multi-Language Support**

For global organizations with properties in different regions, Salesforce can support **multi-currency** and **multi-language** configurations to cater to international tenants and manage leases in various currencies.

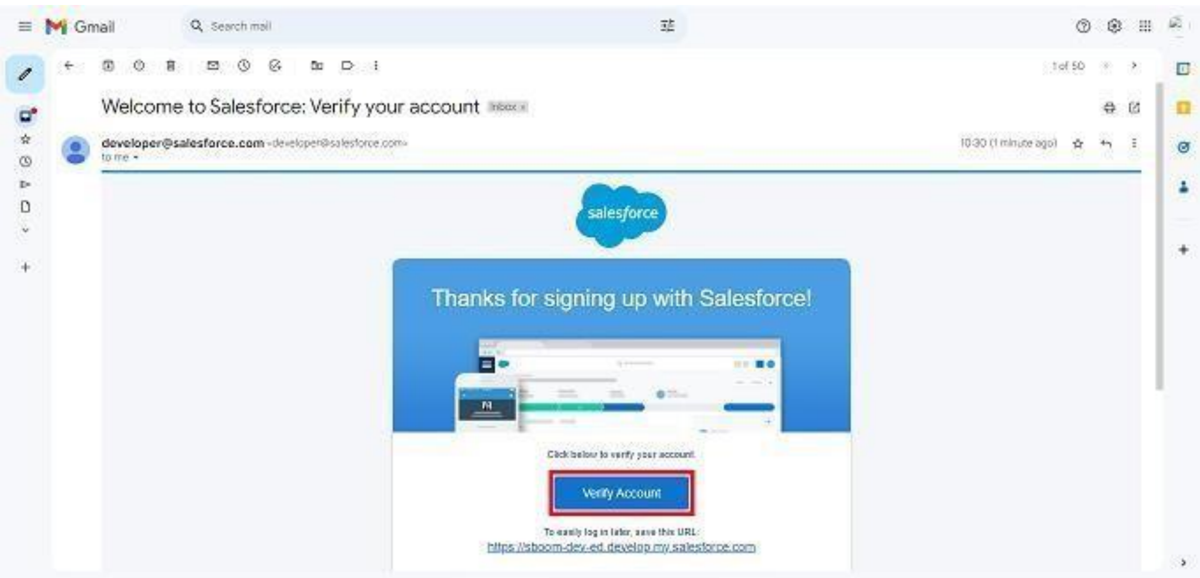
Detailed steps to solution design :

Step 1: Creating Developer Account and Activation

Creating a developer org in salesforce.

To Activate the account, click on the verify account. Give a password and answer a security question and click on change password.

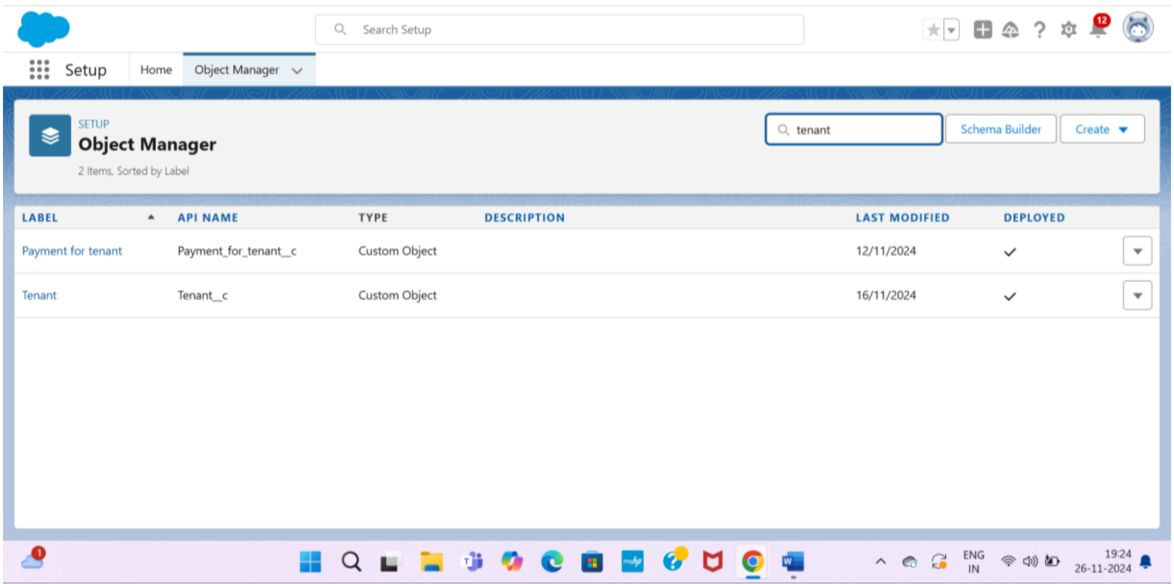
Give a password and answer a security question and click on change password. Then you will redirect to your salesforce setup page.



Step 2: Create of objects

Create Property Object, tenant object, lease object and payment object.

From the setup page >> Click on Object Manager >>Click on Create >> Click on Custom Object

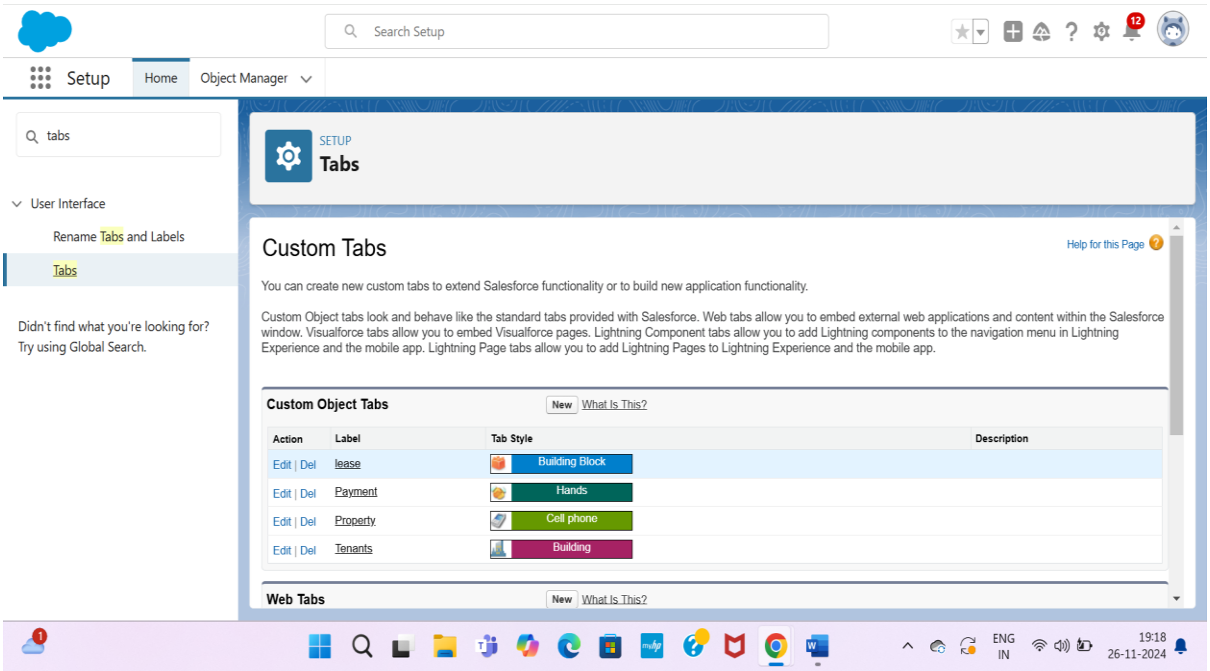


Enter the label name for the appropriate object. Then enter the Plural label name.

Enter Record Name Label and Format Record Name and Data Type.

Step 3: Creating a Custom Tab

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



Step 4: Create a Lightning App

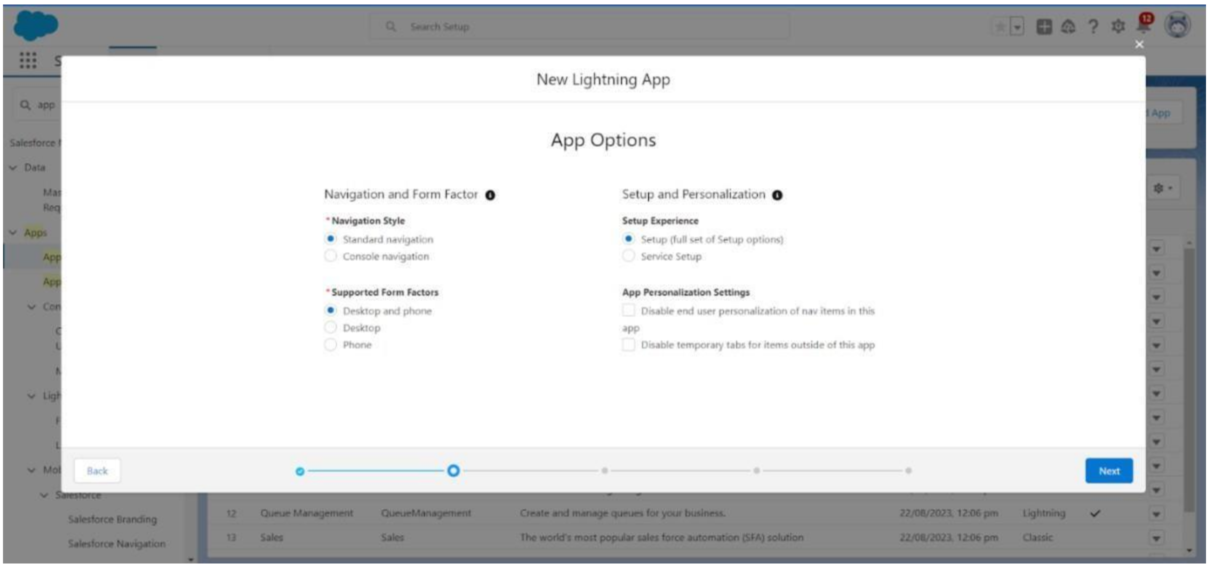
An app is a collection of items that work together to serve a particular function.

To create a Tab:(Property)

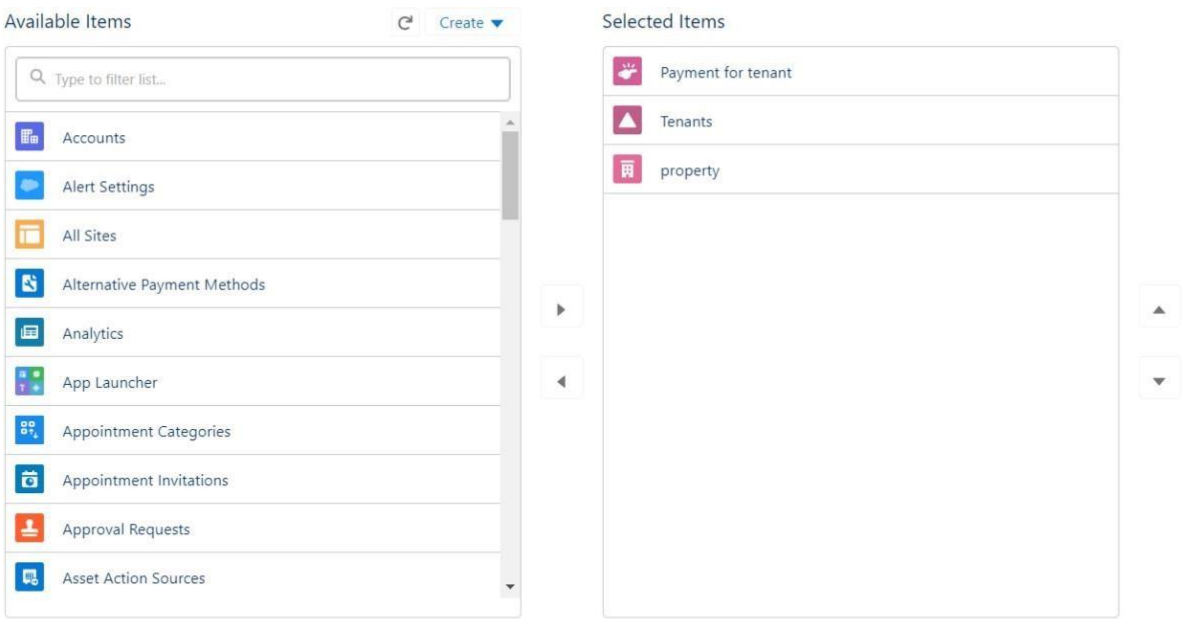
Goto set up page. Search tabs on quick find bar click new under custom tab.

The first step is to select object property and tab style.

Make sure that the Append tab to users' existing personal customizations is checked. Click save



Create a lightning app with an App Name of "Lease Management"



Step 5: Field Creation

Creation of fields for the property object, Tenant object, Lease object, Payment for tenant object, Lookup object

Go to setup then click on Object Manager to type object name(Tenant) in search bar and click on the object.

Field Label : Email

Field Name : gets auto generated

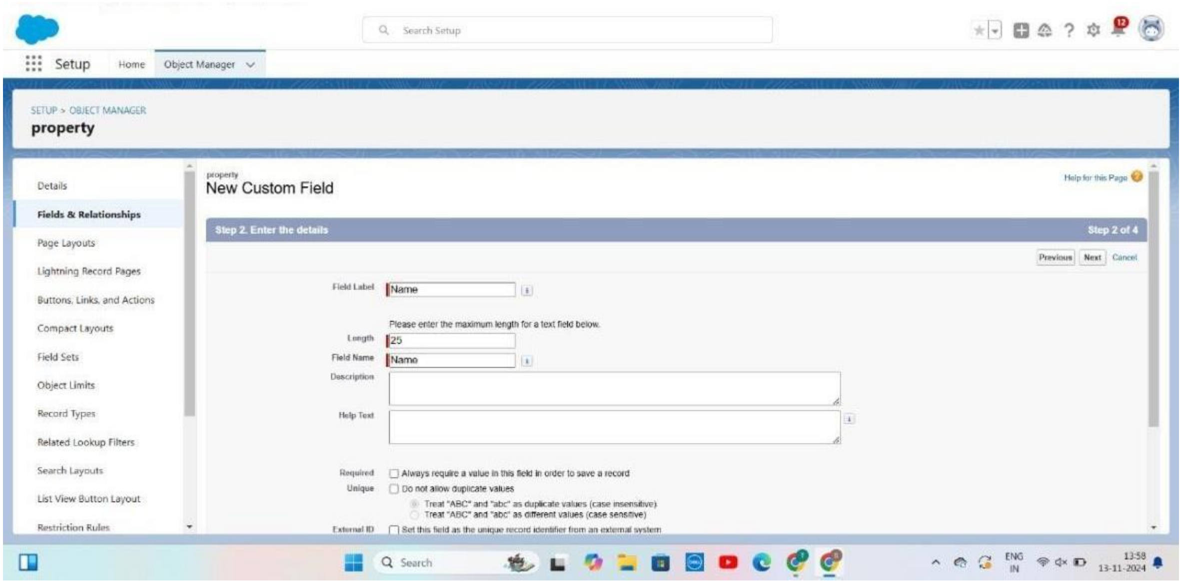
Click on required check box

Click on Next >> Next >> Save and new.

Field Label : start date

Field Name : gets auto generated

Click on Next >> Next >> Save and new.



Step 6: Validation rules

To create a validation rule to an Lease Object.

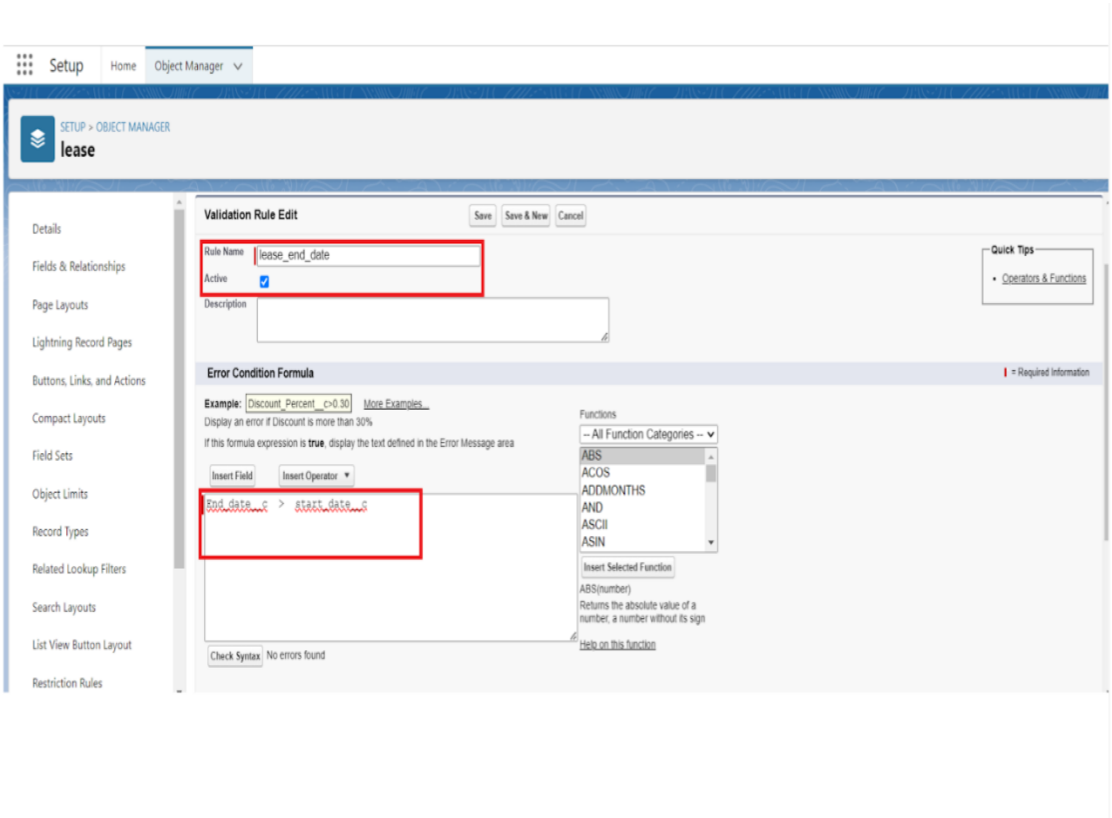
Go to the setup page click on object manager from drop down click edit for Lease object**.**

Click on the validation rule.click new

Rule name= lease_end_date

Insert the Error Condition Formula as : End_date_c > start_date______c

Enter the Error Message as “Your End date must be greater than start date”, select the Error location as Field and select the field as “start date”, and click Save.



Step 7: Email templates

1.Create Email Template For Tenant Leaving

Go to setup in quick find box enter email template, click on classic Email template.

Then click on new email template choose text

Email template name: tenant leaving

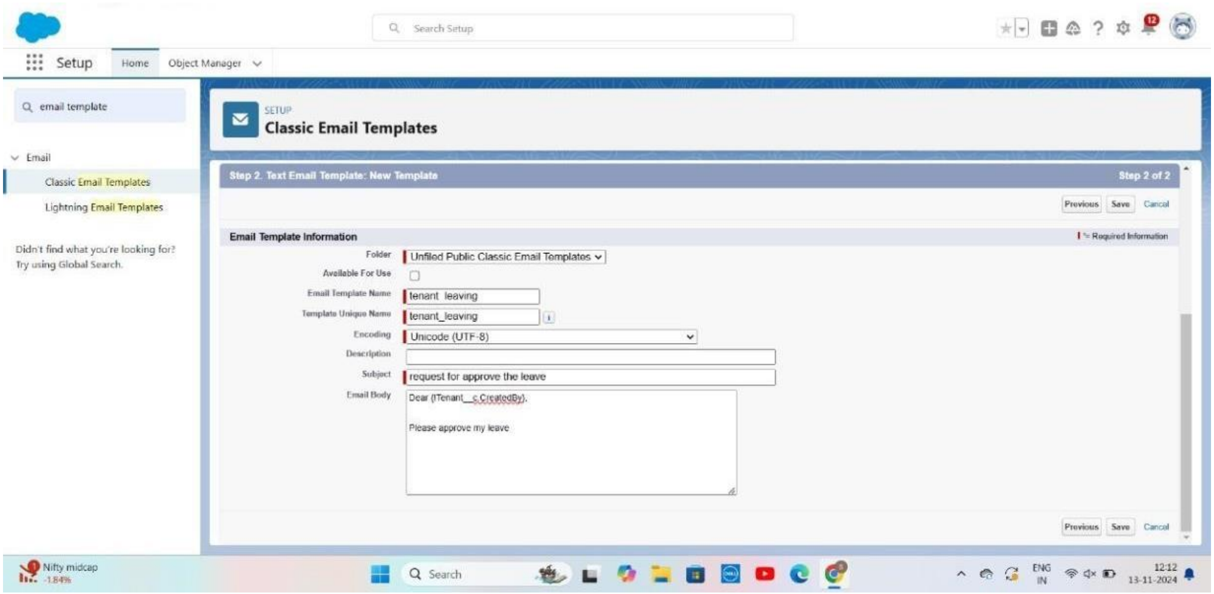
Template unique name: Auto populated

Subject: request for approve the leave

Email body:

Dear {!Tenant_c.CreatedBy}, Please approve my leave.

Save.



2.Create Email Template For Leave Approved

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

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

Email Template Name=Leave approved

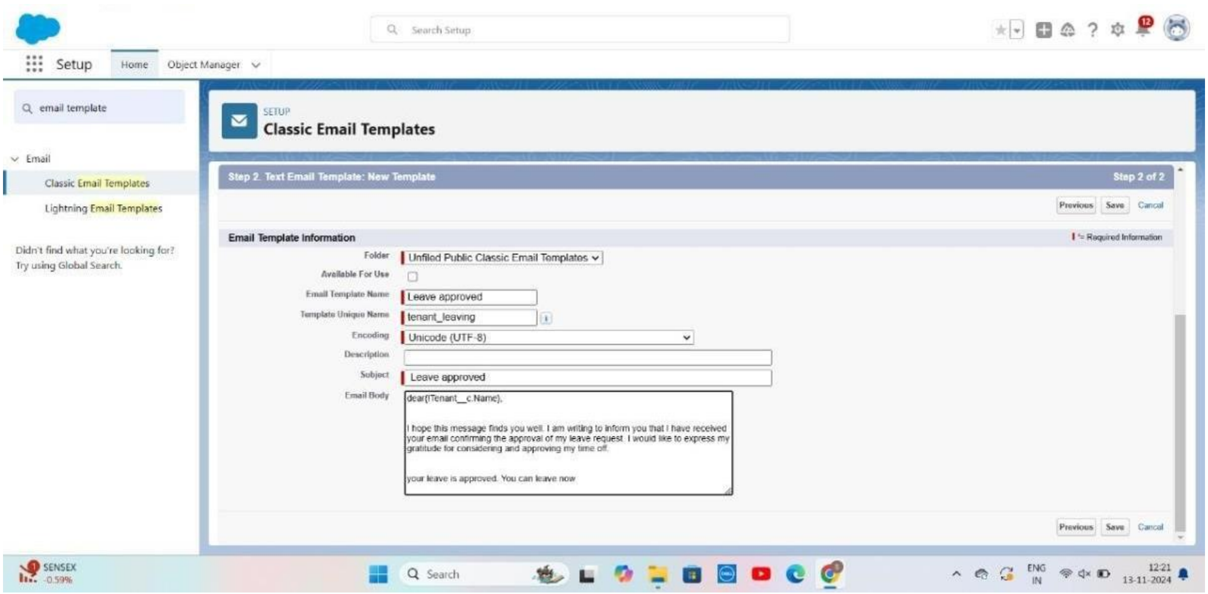
Template Unique Name : Auto populated

Subject =Leave approved

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.

Save

3.Create Email Template For rejection for leave

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

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

Email Template Name=Leave rejected

Subject : " Leave rejected"

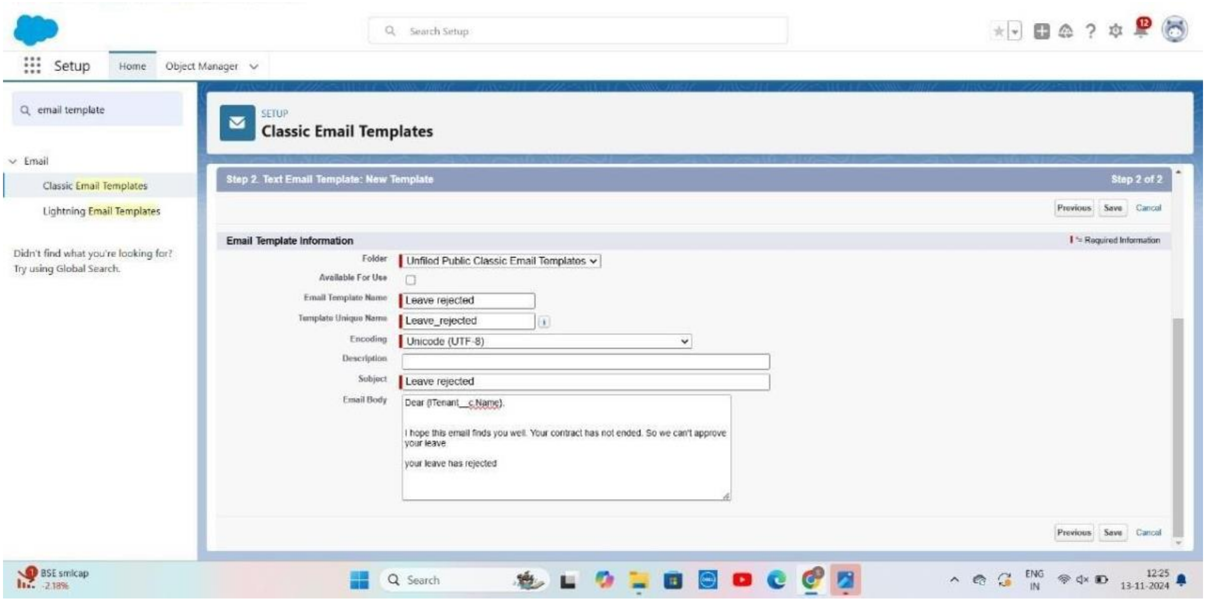
Email body :

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 .

Saved



Step 8: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.

There are 4 actions,

1.Initial Submission Actions

2.Final Approval Actions

3. Final Rejection Actions

4. Recall Actions.

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.

1.Create Approval Process For check for vacant.

Go to setup >> Approval Processes in quick find bar>>click on it.

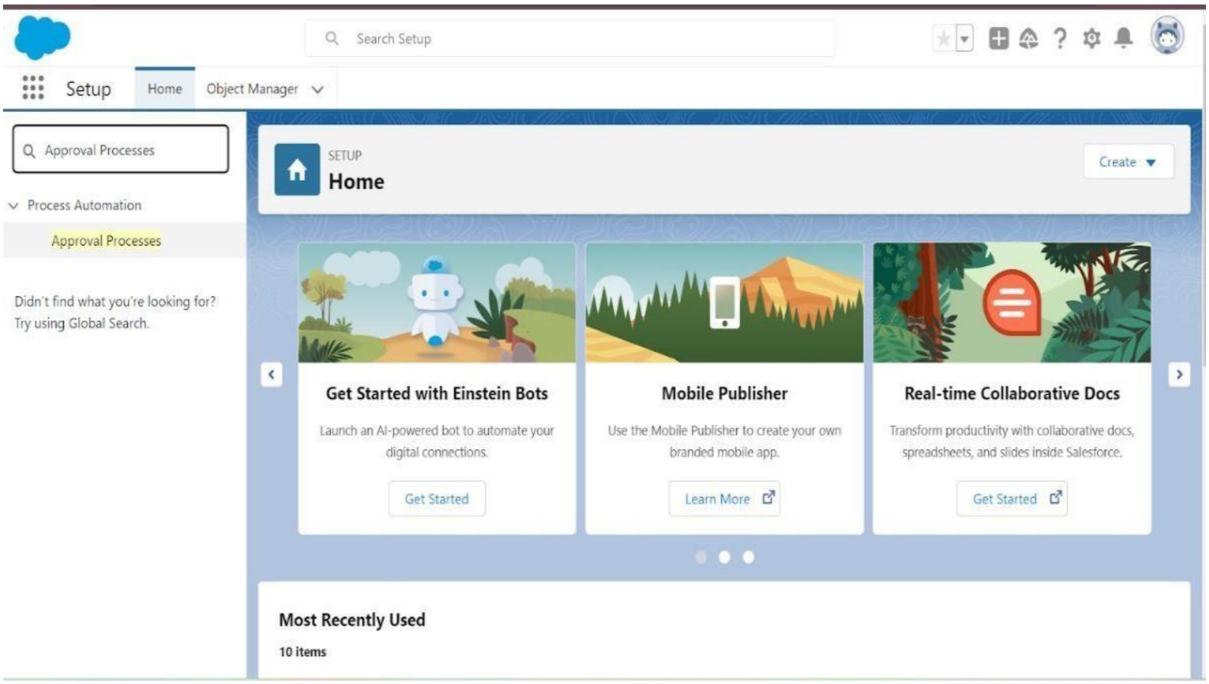
Manage Approval Process For >> “Tenant” from the drop down.

Click on “Create New Approval Process” >> Use standard setup wizard

Process Name “check for vacant” >> Click Next.

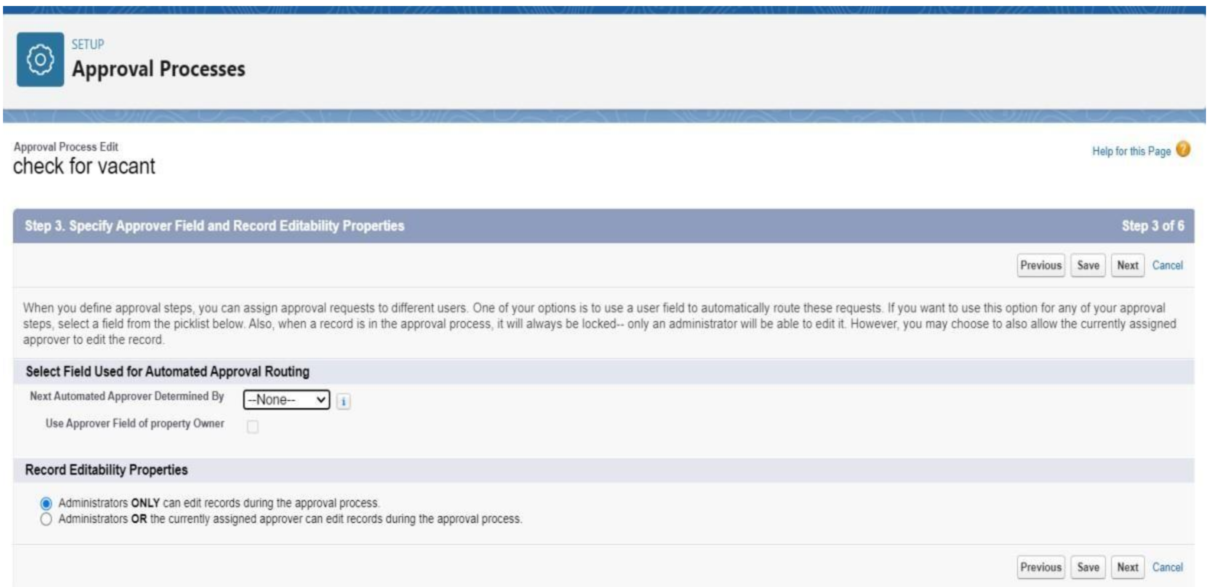
Field “Tenant:status” >> Operator : Not equals , Value >> Click on the lookup filter icon and select “Leaving”.

Click insert field,then click Next.



Next Automated Approver determined by "None" from the drop down.

Select the "Administrators ONLY can edit records during the approval process". Then Next.

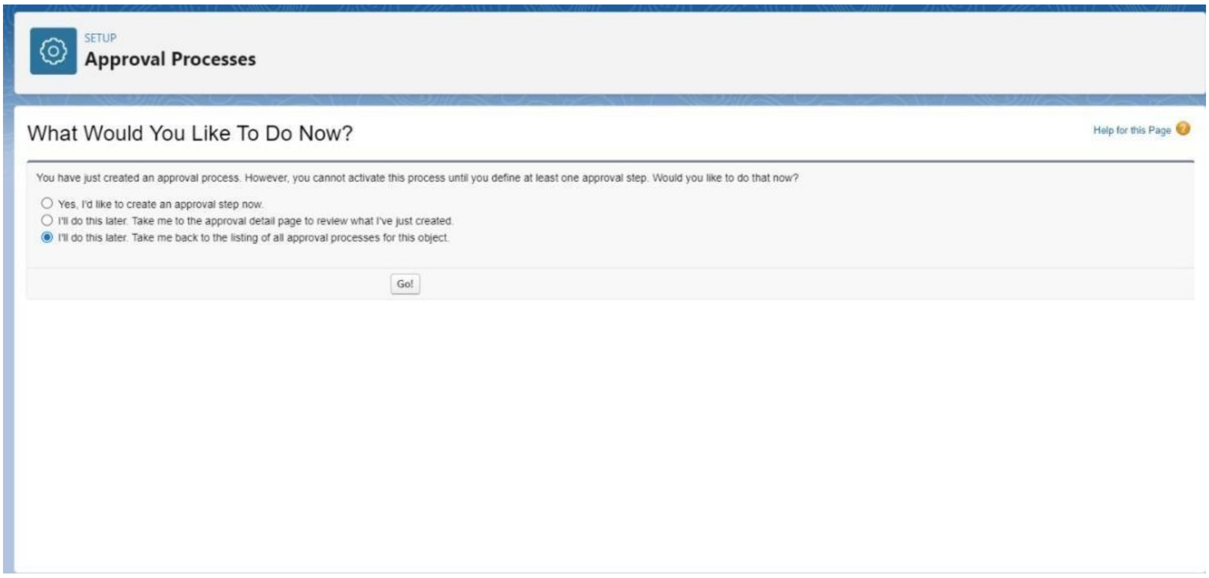


Click on next leave the email template click on next

Submitter type Search>>Owner, Allowed Submitters>>Property Owner.

Then Next.

Then click on Save.



Click on “i’ll do this later. Take me back to the listing of all approval process for this object”

Click go.

2.Initial Submission Action:

Under initial submission action click on add new and then select email alert.

Description: “please approve my leave”.

Unique name: auto populated.

Email template: tenant leaving.

Recipient type: Email field.

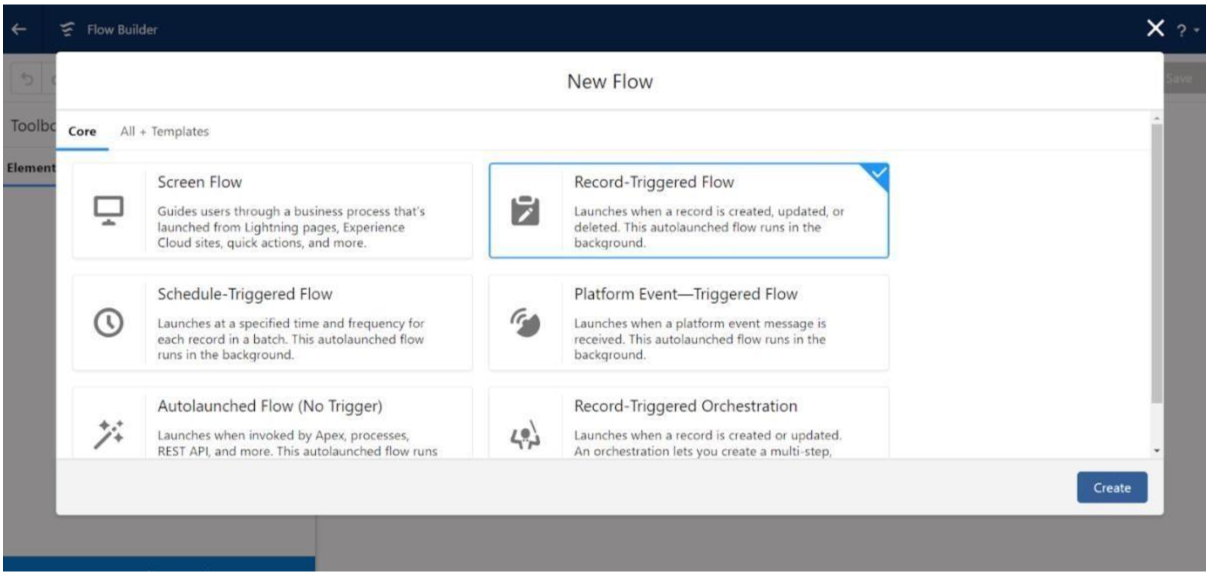
Step 8: Flows

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.

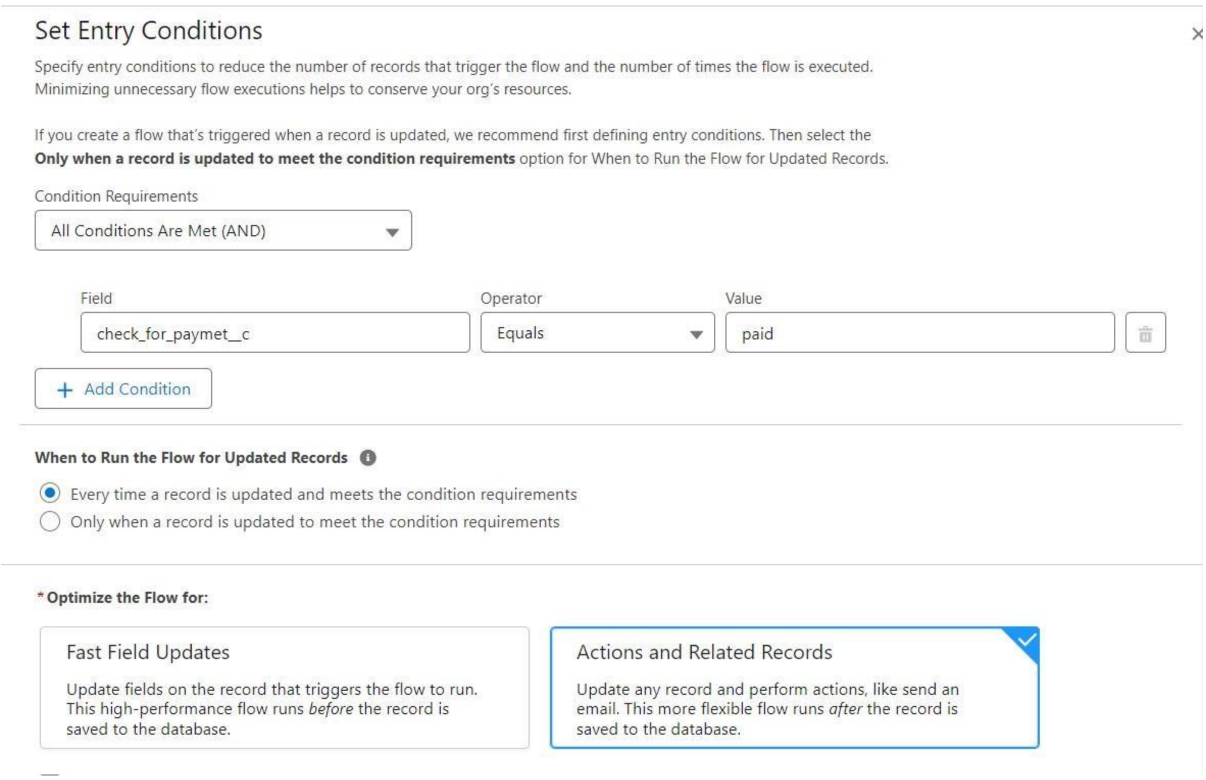
Create Flow for monthly payment

1.Go to setup then type Flow in quick find box Click on the Flow and Select the New Flow.

2.Select the record Triggered flow. Click on create.



Click on: Every time a record is updated and meets the condition requirements Click on: Actions and related records is done



Test and validation:

Testing and validation in lease management can involve a variety of activities, including:

Lease validation services:

Help property management companies ensure that lease agreements are legal and enforceable. These services can help identify issues and verify the terms and conditions of a lease.

Test planning and execution:

This involves executing and monitoring validation tests according to a test plan and design. It also includes verifying and validating the test results, and recording and reporting any issues or defects.

Test objectives and criteria:

These should be defined clearly and explicitly before starting testing and validation. They should align with the project's goals, scope, specifications, and the needs and expectations of the stakeholders and users.

Validation testing:

This is used to verify that the final product meets the expectations and requirements of the customers and stakeholders. It usually happens after the product is fully developed and focuses on confirming that it works as intended in real-world scenarios.

Conclusion:

The Lease Management App in Salesforce provides a robust and scalable solution to streamline the management of lease agreements, tenant interactions, property details, and payment tracking. By utilizing Salesforce's powerful features, including custom objects, automation tools, reporting capabilities, and collaboration features, the app significantly improves operational efficiency, reduces manual processes, and enhances data accuracy.

Overall, the Lease Management App in Salesforce empowers organizations to optimize their lease management processes, improve tenant satisfaction, and drive greater operational performance while reducing administrative overhead and ensuring compliance with lease terms. This solution is positioned to transform lease management into a streamlined, automated, and highly efficient business function.