LEASE MANAGEMENT

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College Code: 19

TEAM ID: NM2025TMID21362

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Creating Developer Account:

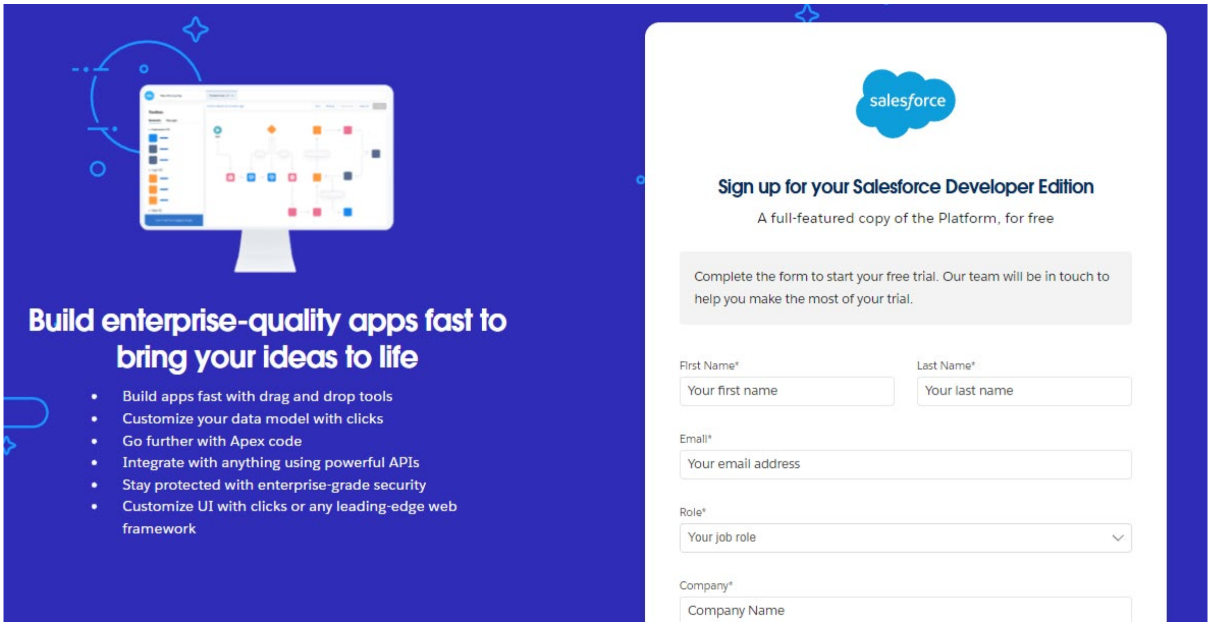
Creating a developer org in salesforce.

1. Go to https://developer.salesforce.com/signup
2. On the sign up form, enter the following details :

1. First name & Last name
2. Email
3. Role : Developer
4. Company : College Name
5. County : India
6. Postal Code : pin code
7. 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.



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- 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

salesforce

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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

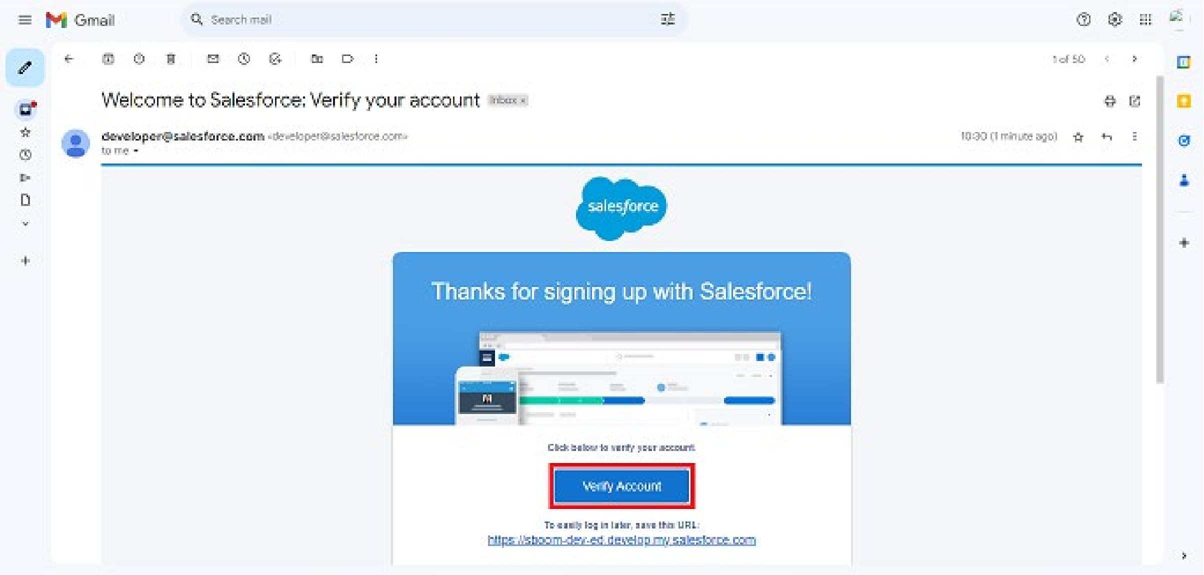
Email* Your email address

Role* Your job role

Company* Company Name

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.



Welcome to Salesforce: Verify your account Inbox ×

developer@salesforce.com <developer@salesforce.com>
to me

10:30 (1 minute ago)

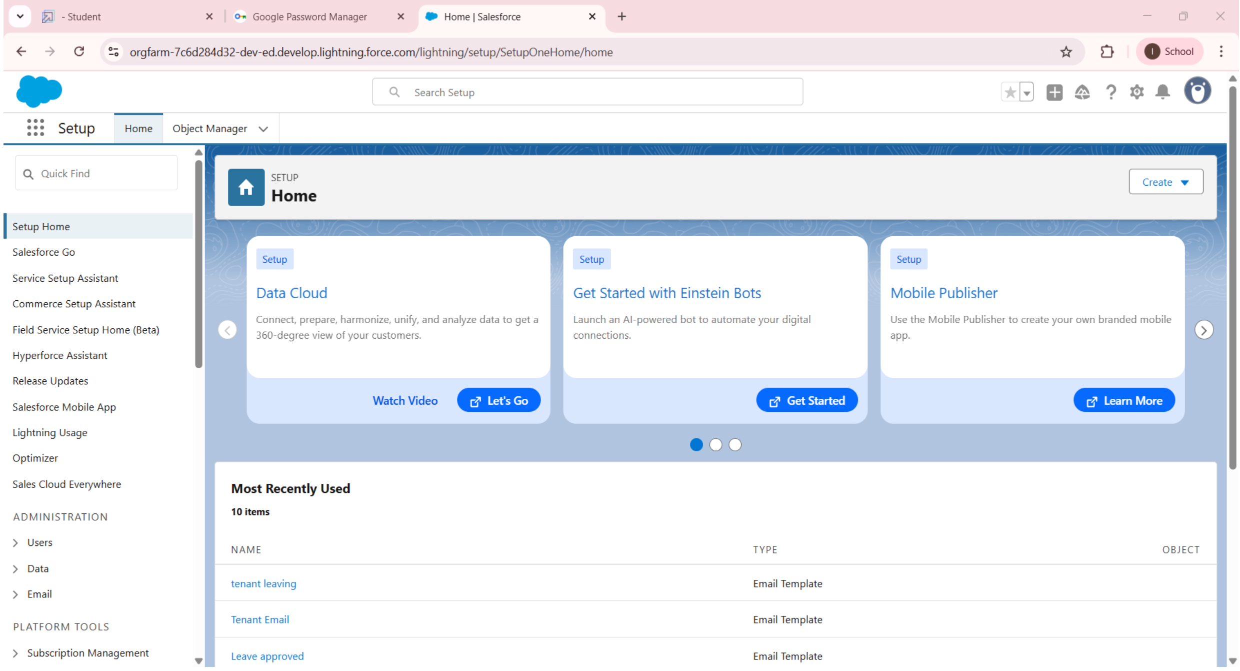
Thanks for signing up with Salesforce!

Click below to verify your account.

Verify Account

To easily log in later, save this URL:
https://sboom-dev-ed.develop.my.salesforce.com

After the verify the account the page will show like this :



orgfarm-7c6d284d32-dev-ed.develop.lightning.force.com/lightning/setup/SetupOneHome/home

SETUP
Home

Setup
Data Cloud
Connect, prepare, harmonize, unify, and analyze data to get a 360-degree view of your customers.
Watch Video | Let's Go

Setup
Get Started with Einstein Bots
Launch an AI-powered bot to automate your digital connections.
Get Started

Setup
Mobile Publisher
Use the Mobile Publisher to create your own branded mobile app.
Learn More

Most Recently Used
10 items

NAME	TYPE	OBJECT
tenant leaving	Email Template	
Tenant Email	Email Template	
Leave approved	Email Template	

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.

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.

Create Property Object:

To create an object:

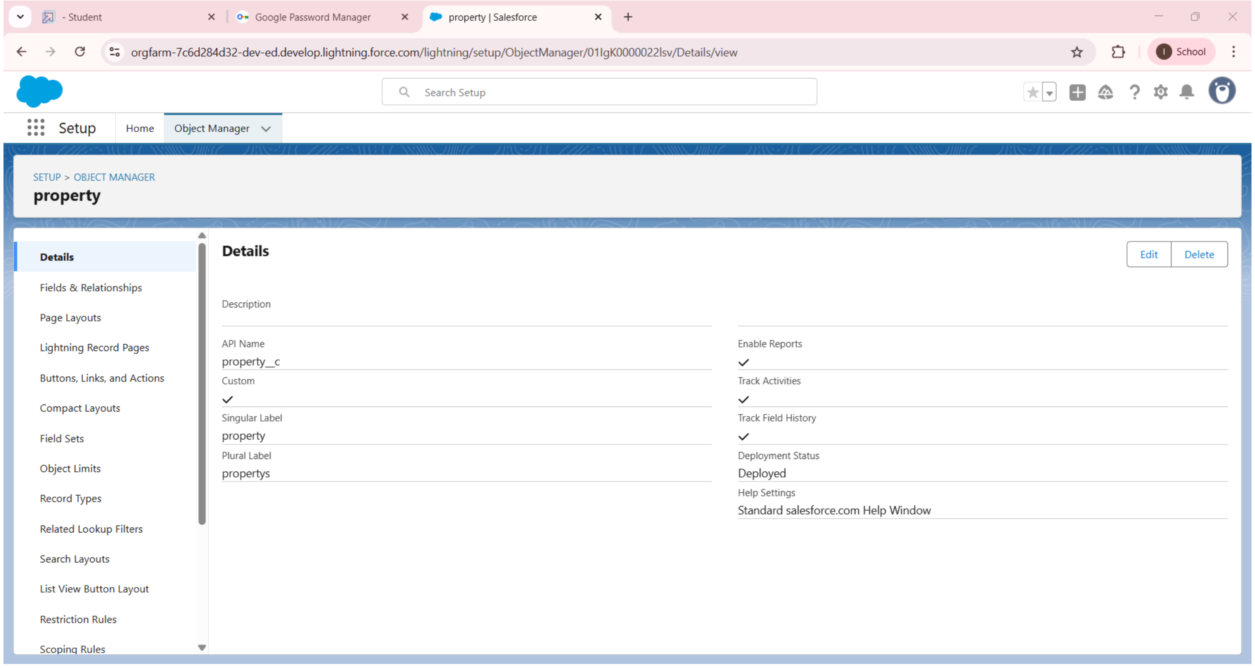
1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.

1. Enter the label name>> property
2. Plural label name>> property
3. Enter Record Name Label and Format

- Record Name >>property Name
- Data Type >> Text

Click on Allow reports and Track Field History,Allow Activities

Allow search >> Save.



Details

Description

API Name
property__c

Custom
✓

Singular Label
property

Plural Label
propertys

Enable Reports
✓

Track Activities
✓

Track Field History
✓

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Create Tenant Object:

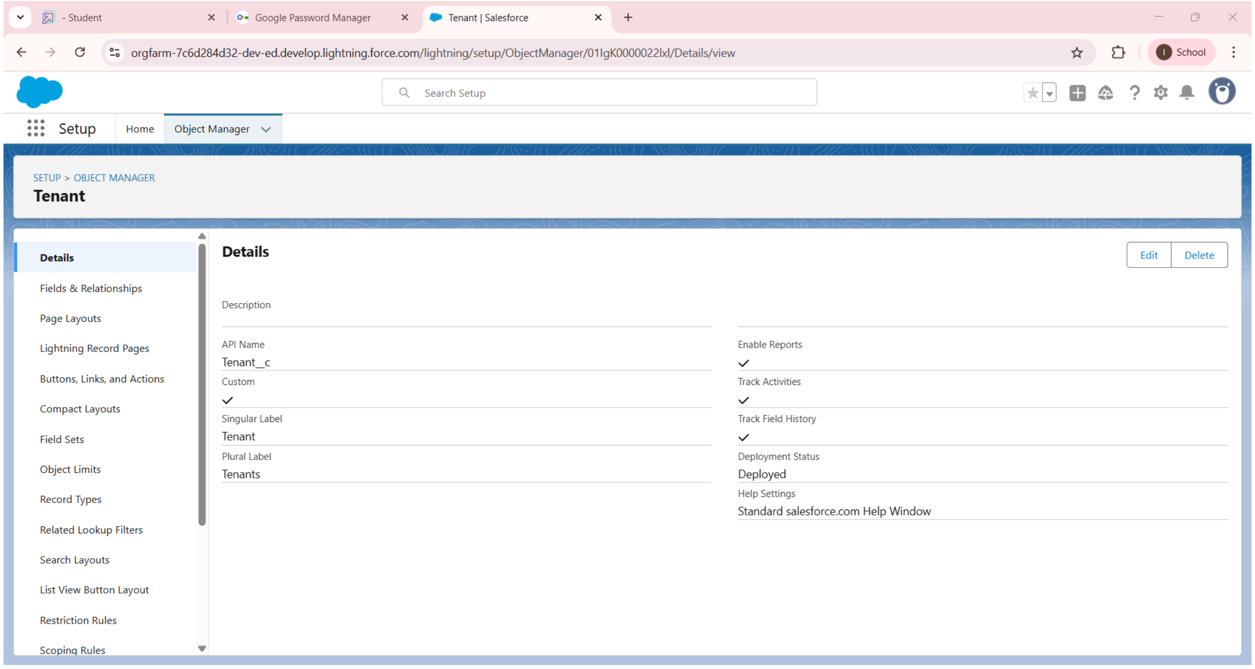
To create an object:

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

1. Enter the label name>> Tenant
2. Plural label name>> Tenants
3. Enter Record Name Label and Format

- Record Name >> Tenant Name
- Data Type >> Text

2. Click on Allow reports and Track Field History,Allow Activities
3. Allow search >> Save.



Details

Description

API Name
Tenant__c

Custom
✓

Singular Label
Tenant

Plural Label
Tenants

Enable Reports
✓

Track Activities
✓

Track Field History
✓

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Create Payment Object

To create an object:

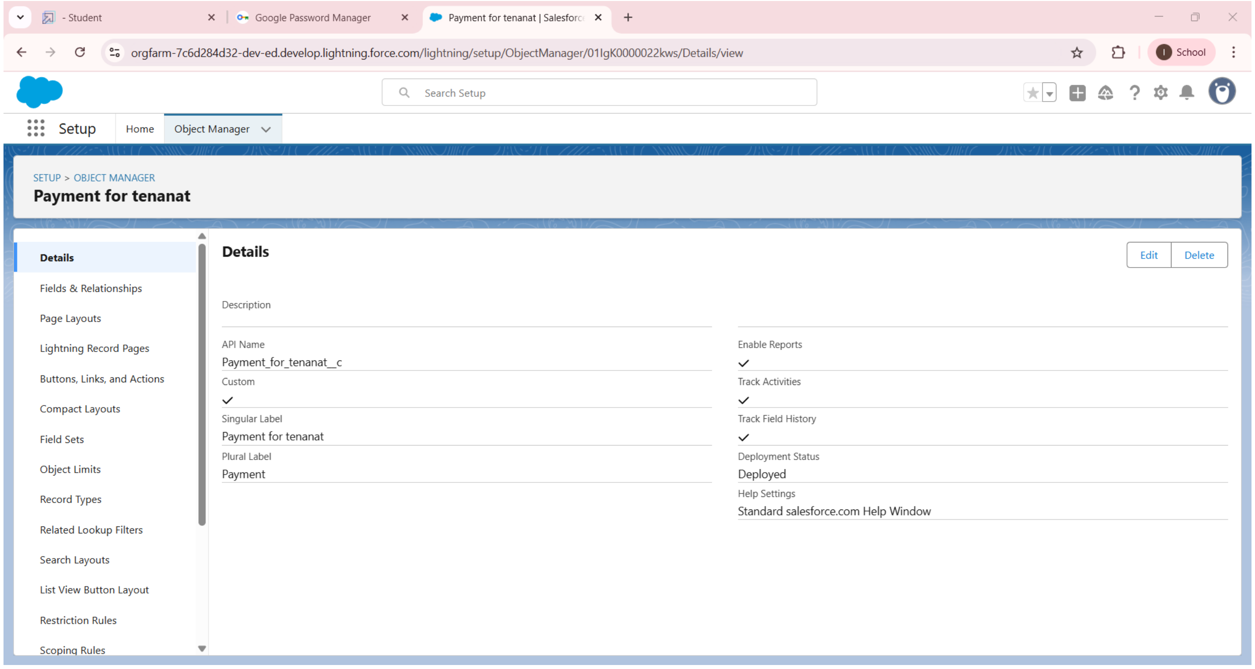
1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.

1. Enter the label name>> Payment for tenanat
2. Plural label name>> Payment
3. Enter Record Name Label and Format

- Record Name >> Payment Name
- Data Type >> Text

2. Click on Allow reports and Track Field History,Allow Activities

Allow search >> Save.



Payment for tenanat

Details

Description

API Name
Payment_for_tenanat__c

Custom
✓

Singular Label
Payment for tenanat

Plural Label
Payment

Enable Reports
✓

Track Activities
✓

Track Field History
✓

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Create Lease Object

To create an object:

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

1. Enter the label name>> lease

2. Plural label name>> lease

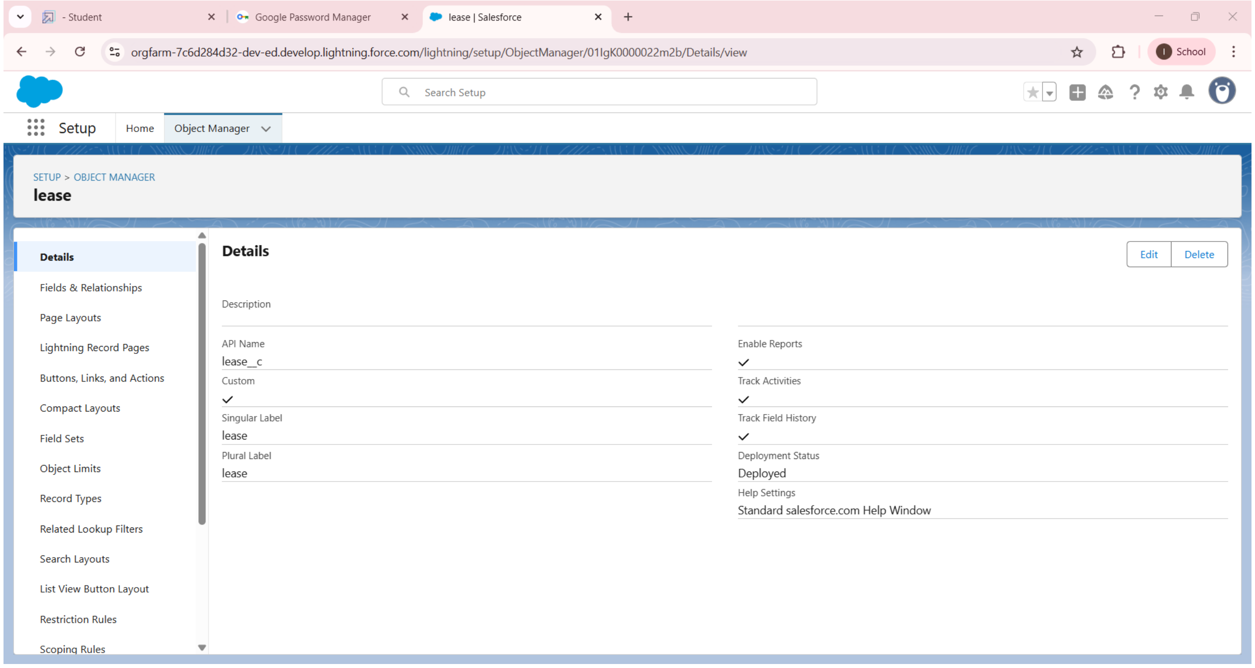
3. Enter Record Name Label and Format

- Record Name >> lease Name

- Data Type >> Text

2. Click on Allow reports and Track Field History,Allow Activities

3. Allow search >> Save.



Details

Description

API Name
lease__c

Custom
✓

Singular Label
lease

Plural Label
lease

Enable Reports
✓

Track Activities
✓

Track Field History
✓

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

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.

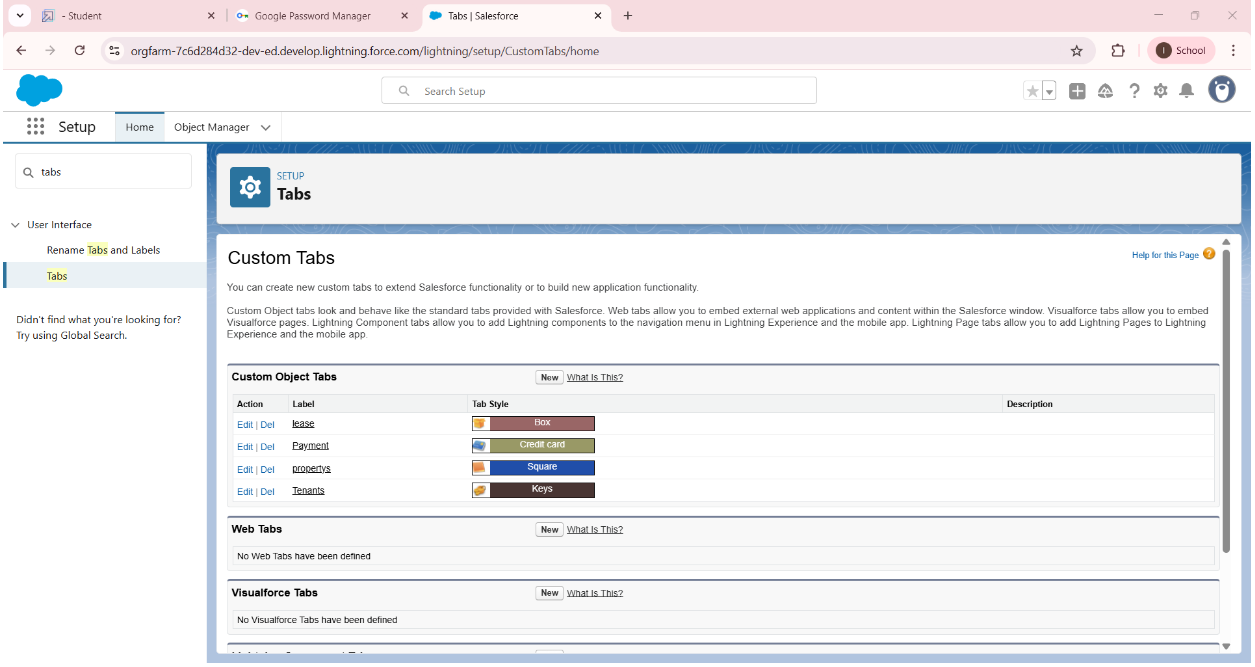
Creating a Custom Tab

To create a Tab:(Property)

1. Go to setup page >>type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)
2. Select Object(property) >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) uncheck the include tab .
3. Make sure that the Append tab to users' existing personal customizations is checked.
4. Click save

Creating Remaining Tabs

1. Now create the Tabs for the remaining Objects, they are “Payment for tenant,lease,tenant”.
2. Follow the same steps as mentioned in Activity -1 .
3. After completed the creating the tabs it show like this



Custom Tabs

Help for this Page

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
Edit | Del	lease	Box	
Edit | Del	Payment	Credit card	
Edit | Del	propertys	Square	
Edit | Del	Tenants	Keys	

Web Tabs New What Is This?

No Web Tabs have been defined

Visualforce Tabs New What Is This?

No Visualforce Tabs have been defined

Create a Lightning App

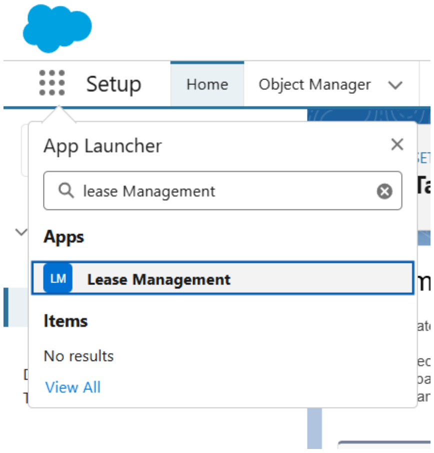
To create a lightning app page:

1. Go to setup page >> search “app manager” in quick find >> select “app manager” >> click on New lightning App.
2. 2. Fill the app name in app details and branding as follow
3. App Name : Lease ManagementDeveloper Name : This will auto populatedImage : optional (if you want to give any image you can otherwise not mandatory) Primary colour hex value : keep this default.
4. 3.Then click Next >> (App option page)Set Navigation Style as Standard Navigation >> Next.
5. (Utility Items) keep it as default >> Next.
6. To Add Navigation Items:
7. 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.

8. 6. To Add User Profiles:

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

After creating the lightning app it show like this:



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.

Creation of fields for the property object

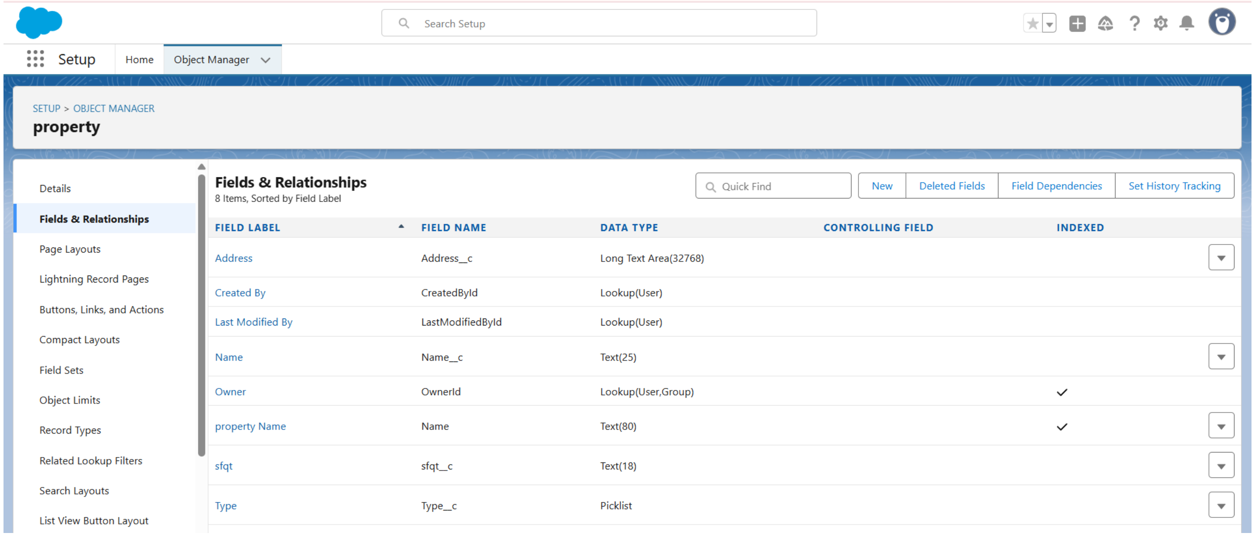
To create fields in an object:

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”

4. Click on next
5. 5. Fill the Above as following:
6. Field Label: Name
7. Field Name : gets auto generated
8. Length : 25
9. Required :check box
10. Click on Next >> Next >> Save and new.

11. 2. To create another fields in an object:
12. Go to setup >> click on Object Manager >>type object name(property) in search bar >>click on the object.
13. Now click on “Fields & Relationships” >>New
14. Select Data type as a “Long Text” and Click on Next
15. Fill the Above as following:
16. Field Label : Address
17. Field Name : gets auto generated
18. Click on Next >> Next >> Save and new.
19. 3. To create another fields in an object:
20. Go to setup >> click on Object Manager >>type object name(property) in search bar >> click on the object.
21. Now click on “Fields & Relationships” >> New
22. Select Data type as a “picklist” and Click on Next
23. Fill the Above as following:
24. Field Label : Type
25. Field Name : gets auto generated
26. Enter values, with each value separated by a new line
27. Enter these values
    1BHK
    2BHK
    3BHK
28. Click on Next >> Next >> Save and new.
29. To create another fields in an object:
30. Go to setup >> click on Object Manager >> type object name(property) in search bar >> click on the object.
31. Now click on “Fields & Relationships” >> New
32. Select Data type as a “ Text” and Click on Next
33. Fill the Above as following:
34. Field Label : sfqt
35. Field Name : gets auto generated
36. Length : 18
37. Click on Next >> Next >> Save.



property

Fields & Relationships
8 Items, Sorted by Field Label

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(25)		
Owner	OwnerId	Lookup(User,Group)		✓
property Name	Name	Text(80)		✓
sfqt	sfqt__c	Text(18)		
Type	Type__c	Picklist		

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:

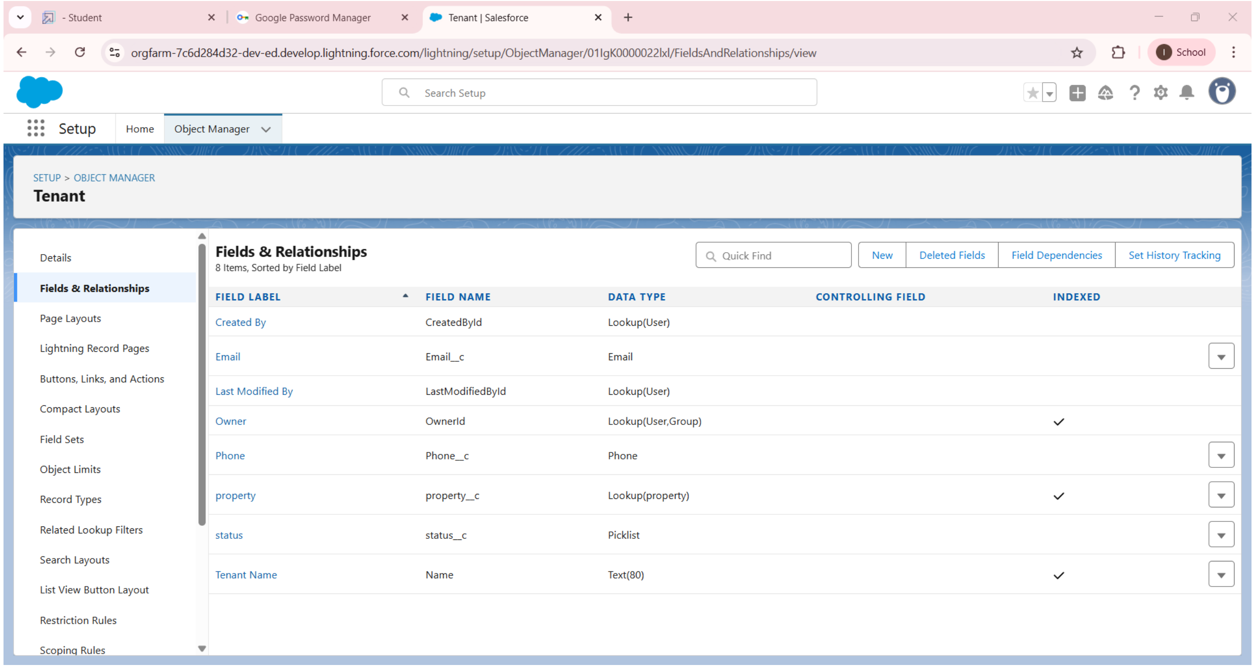
5. Go to setup >> click on Object Manager >> type object name(Tenant) in search bar >> click on the object.
6. Now click on “Fields & Relationships” >>New
7. Select Data type as a “picklist” and Click on Next
8. Fill the Above as following:

- 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



Fields & Relationships

8 Items, Sorted by Field Label

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

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:

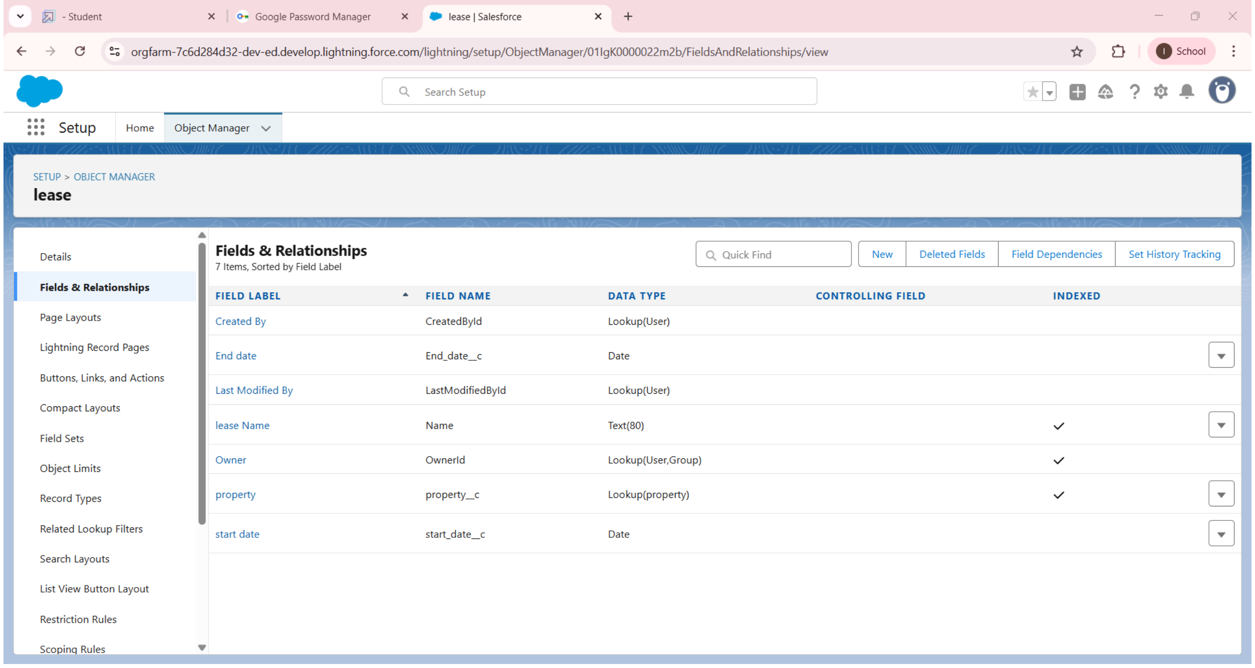
1.Go to setup >> click on Object Manager >> type object name(Lease) in search bar >> click on the object.

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.



lease

Fields & Relationships

7 Items, Sorted by Field Label

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		

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:

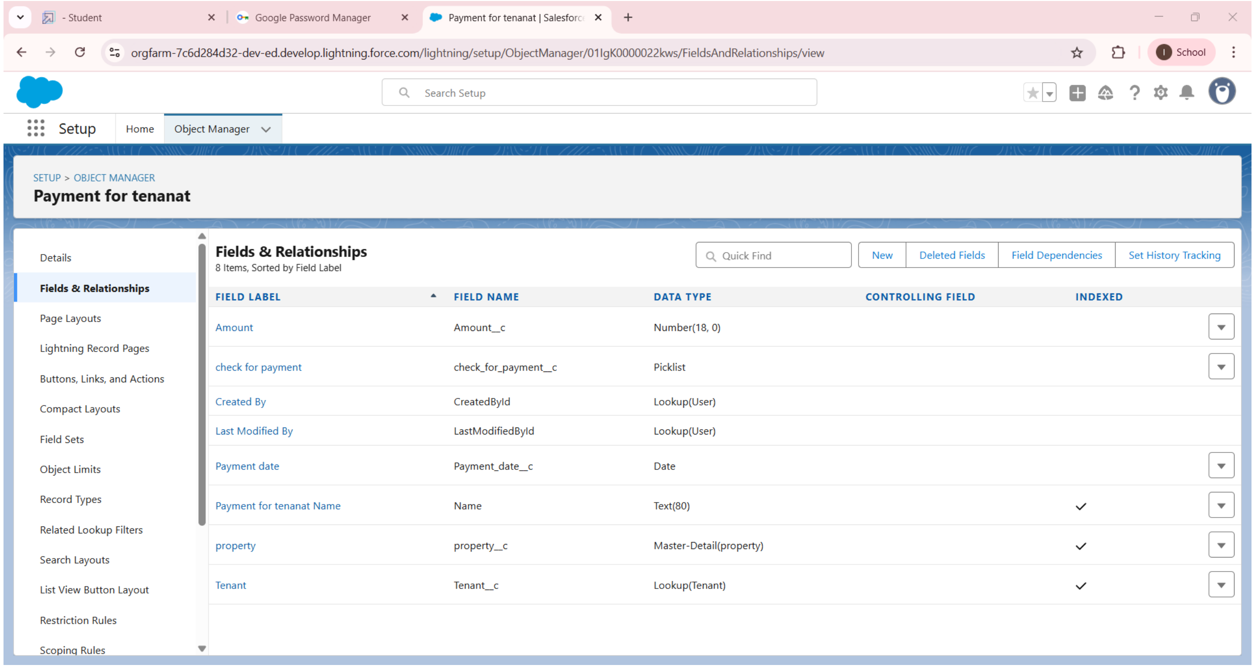
- Field Label : Payment date
- Field Name : gets auto generated
- Click on Next >> Next >> Save and new.

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.



Payment for tenanat

Fields & Relationships

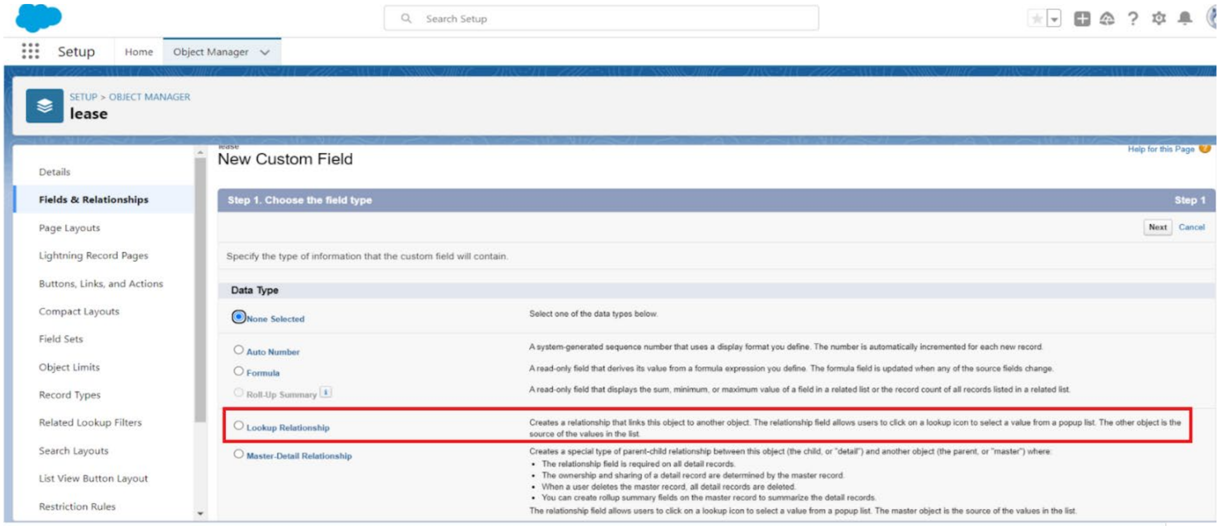
8 Items, Sorted by Field Label

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)		
Payment date	Payment_date__c	Date		
Payment for tenanat Name	Name	Text(80)		✓
property	property__c	Master-Detail(property)		✓
Tenant	Tenant__c	Lookup(Tenant)		✓

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.



lease

New Custom Field

Step 1. Choose the field type — Step 1

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

Data Type

● None Selected	Select one of the data types below.
○ Auto Number	A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
○ Formula	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.
○ Roll-Up Summary	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.
○ Lookup Relationship	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.
○ 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. • 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 popup list. The master object is the source of the values in the list.

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.

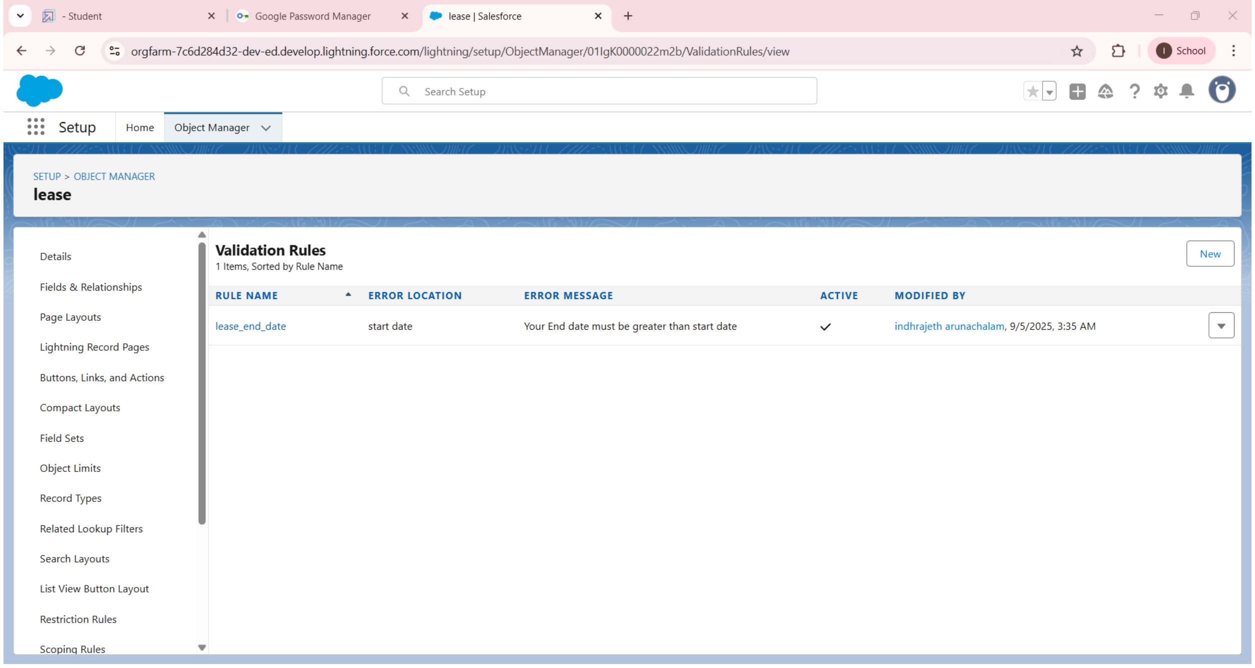
Validation rule

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.

To create a validation rule to an Lease Object

1. Go to the setup page >> click on object manager >> From drop down click edit for Lease object.
2. Click on the validation rule >> click New.

3. Enter the Rule name as “ lease_end_date”.
4. Insert the Error Condition Formula as :
   End_date__c > start_date__c
5. 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.
6. After completing this process it will show like this



Validation Rules
1 Items, Sorted by Rule Name

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
lease_end_date	start date	Your End date must be greater than start date	✓	indhrajeth arunachalam, 9/5/2025, 3:35 AM

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

8. 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.

Create Approval Process For check for vacant

To create fields in an object:

1.Go to setup >> Approval Processes in quick find bar>>click on it.
2.Manage Approval Process For >> “Tenant” from the drop down.

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

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

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

6.Click insert field,then click Next.

7.Next Automated Approver determined by “None” from the drop down.

9. Select the “Administrators ONLY can edit records during the approval process”.Then Next.
   9. Click on next leave the email template click on next
   10.From the available fields select >> Tenant Name, and then add >>Add it to the selected.Then Next.

- Make sure Display approver history is checked.
- And under security settings check the “Allow approvers to access the approval page only from within the Salesforce application. (Recommended)” option.
  11.Submitter type Search>>Owner, Allowed Submitters>>Property Owner.Then Next.
- Then click save.

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

Initial Submission Action:

1. Under in itial submission action click on add new and then select email alert.

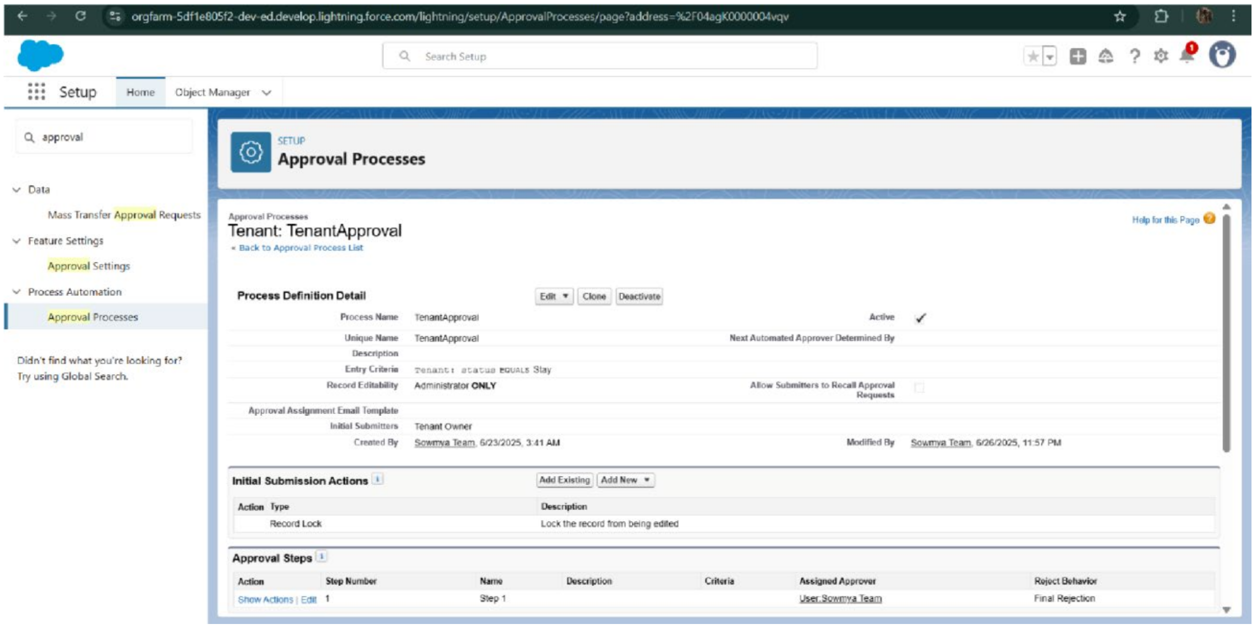
2. Description: “please approve my leave”.
3. unique name : auto populated
4. Email template : tenant leaving
5. Recipient type : Email field
6. Available Recipients : Email field : Email
7. From Email address : Current user’s email
8. Click save

Final Approval Action

1. Under Final approval action click o n new and then select email alert.
2. Description: “Tenant leaving”.
3. unique name : auto populated
4. Email template : Leave approved
5. Recipient type : Email field
6. Available Recipients : Email field : Email
7. From Email address : Current user’s email
8. Click save

Final Rejection Action

1.Under final rejection action click on add new and then select email alert.
2.Description: “your request for leave is rejected”.
3.unique name : auto populated
4.Email template : leave rejected
5. Recipient type : Email field
6. Available Recipients : Email field : Email
7. From Email address : Current user’s email
8. Click save


orgfarm-5df1e805f2-dev-ed.develop.lightning.force.com/lightning/setup/ApprovalProcesses/page?address=%2F04agK0000004vqv
Search Setup
Setup
Home
Object Manager
approval
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.
SETUP
Approval Processes
Help for this Page
Edit
Clone
Deactivate
Add Existing
Add New

Approval Processes

Tenant: TenantApproval

« Back to Approval Process List

Process Definition Detail

Process Name	TenantApproval	Active	✓
Unique Name	TenantApproval	Next Automated Approver Determined By	
Description			
Entry Criteria	Tenant: status EQUALS Stay		
Record Editability	Administrator ONLY	Allow Submitters to Recall Approval Requests	□
Approval Assignment Email Template			
Initial Submitters	Tenant Owner		
Created By	Sowmya Team, 6/23/2025, 3:41 AM	Modified By	Sowmya Team, 6/26/2025, 11:57 PM

Initial Submission Actions

Action	Type	Description
	Record Lock	Lock the record from being edited

Approval Steps

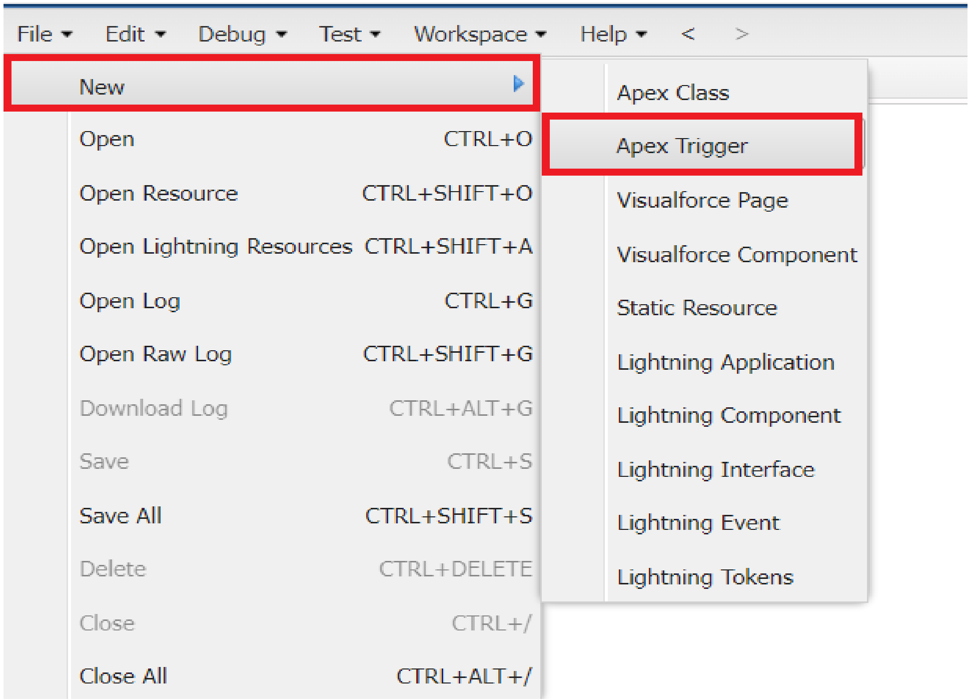
Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Show Actions | Edit	1	Step 1			User: Sowmya Team	Final Rejection

Apex Trigger

Create an Apex Trigger

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

Click on the file >> New ? Apex Class.



1. Give the Apex Trigger name as “test”, and select “Tenant__c” from the dropdown for sObject.
2. Click Submit.
3. Now write the code logic here

Trigger Code:

```
trigger test on Tenant__c (before insert)

{

    if(trigger.isInsert && trigger.isBefore){

        testHandler.preventInsert(trigger.new);

    }

}
```

Create an Apex Handler class

To create a new Apex Class follow the below steps:

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

2. Enter class name as testHandler**.**

Apex logic:

```
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');

            }

        }

    }

}
```

FLOWS

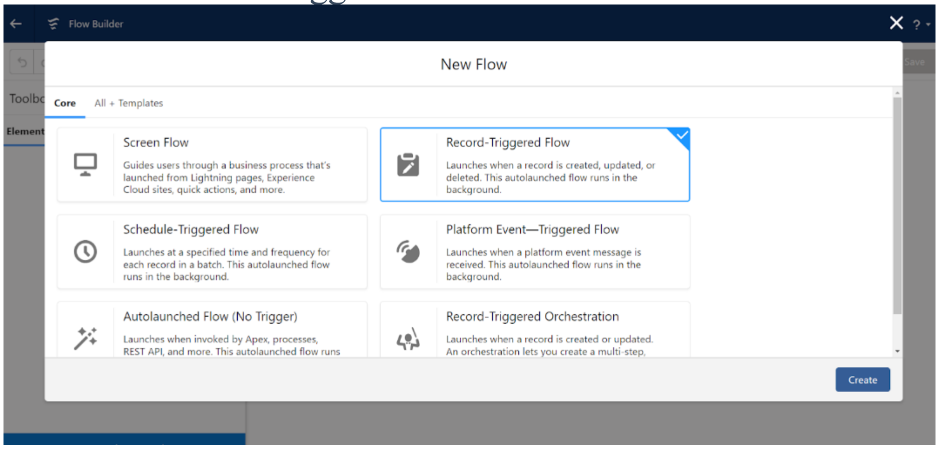
What is a flow ?

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.

Create Flow for monthly payment

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

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



New Flow

Screen Flow
Guides users through a business process that's launched from Lightning pages, Experience Cloud sites, quick actions, and more.

Record-Triggered Flow ✓
Launches when a record is created, updated, or deleted. This autolaunched flow runs in the background.

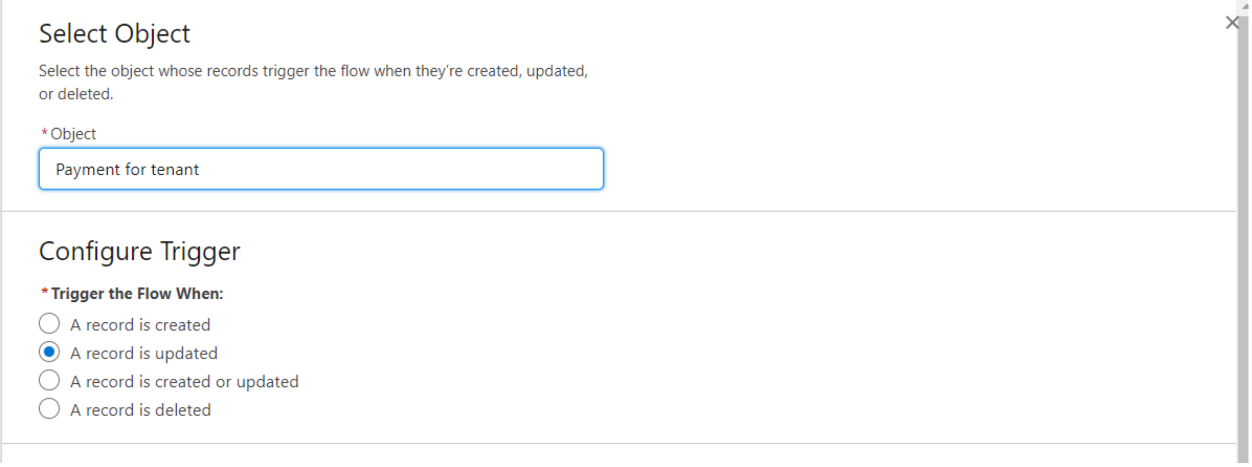
Schedule-Triggered Flow
Launches at a specified time and frequency for each record in a batch. This autolaunched flow runs in the background.

Platform Event—Triggered Flow
Launches when a platform event message is received. This autolaunched flow runs in the background.

Autolaunched Flow (No Trigger)
Launches when invoked by Apex, processes, REST API, and more. This autolaunched flow runs

Record-Triggered Orchestration
Launches when a record is created or updated. An orchestration lets you create a multi-step,

3. Under Object select ”Payment for tenant”. Click on A record is updated.



Select Object

Select the object whose records trigger the flow when they're created, updated, or deleted.

* Object
Payment for tenant

Configure Trigger

* Trigger the Flow When:

○ A record is created
● A record is updated
○ A record is created or updated
○ A record is deleted

4. Set Entry Conditions

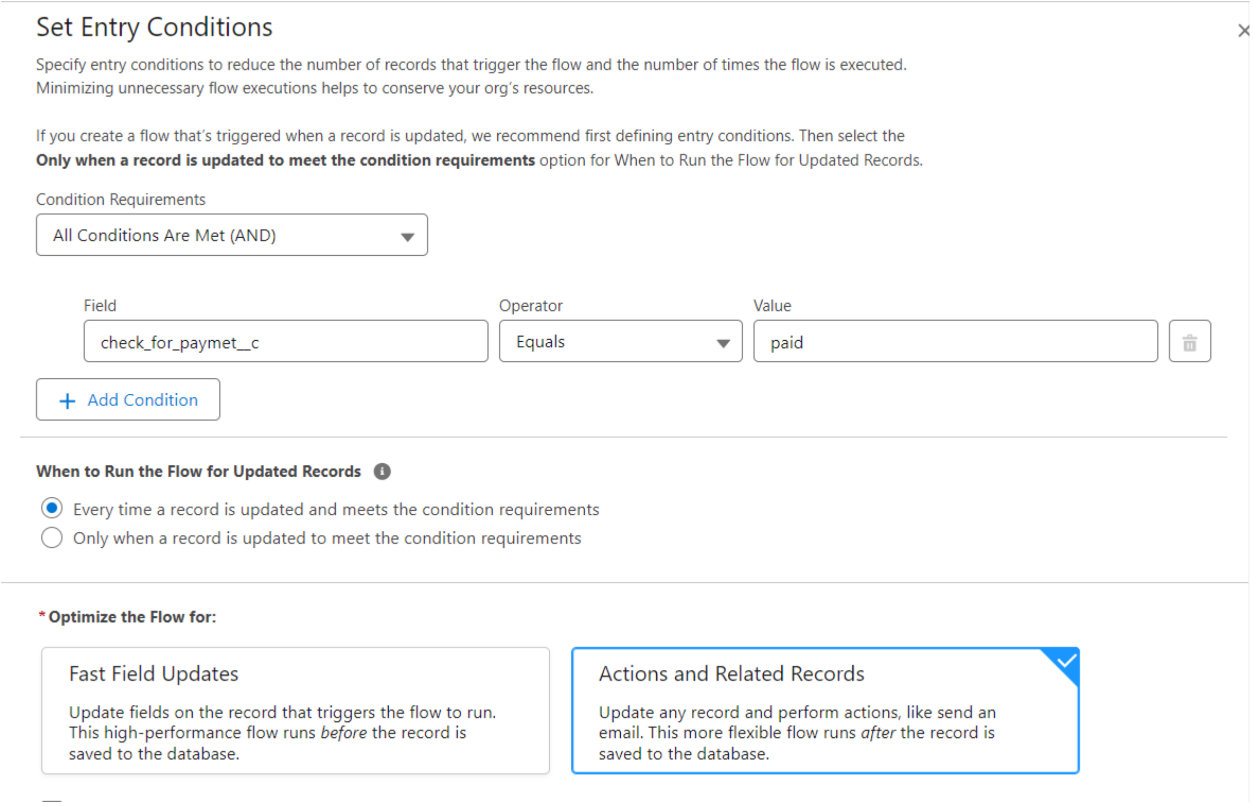
Under Condition Requirements

All Conditions are met

Field: check_for_payment__c	Operator: Equals	Value : paid

5. Click on : Every time a record is updated and meets the condition requirements

6. Click on : Actions and related records,done



Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements: All Conditions Are Met (AND)

Field	Operator	Value
check_for_paymet__c	Equals	paid

When to Run the Flow for Updated Records

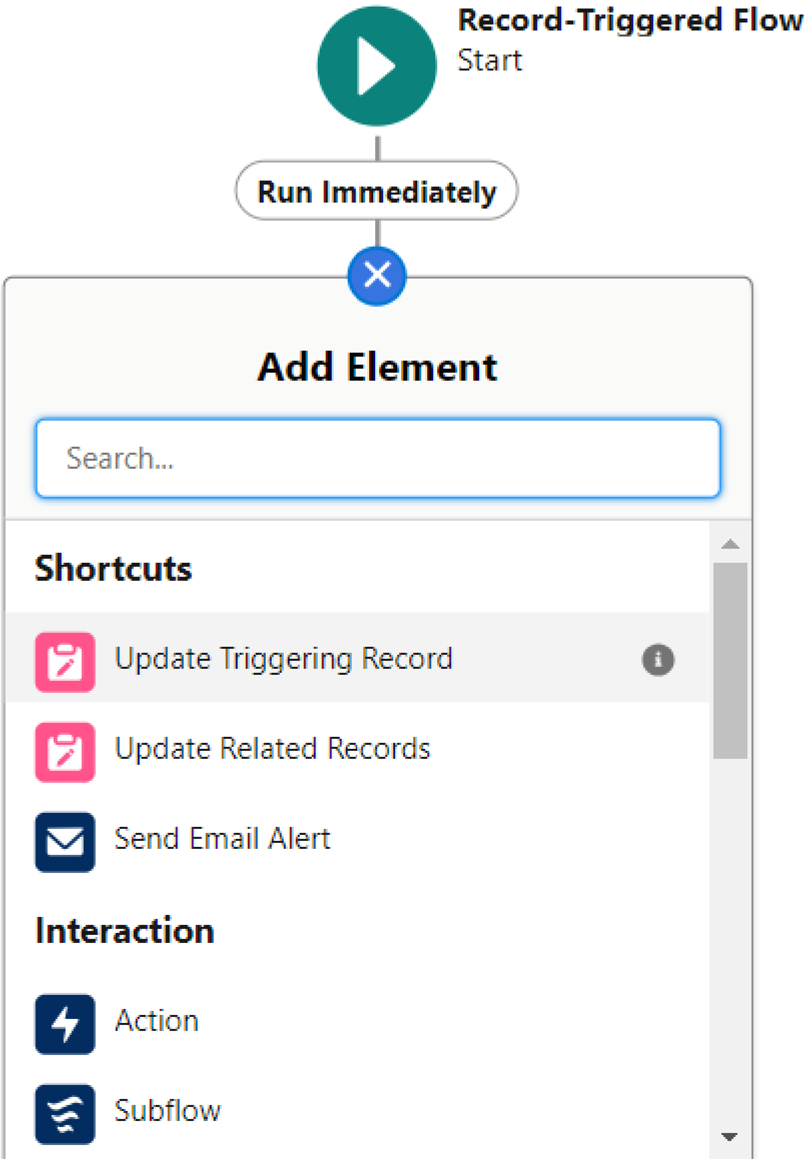
● Every time a record is updated and meets the condition requirements
○ Only when a record is updated to meet the condition requirements

* **Optimize the Flow for:**

Fast Field Updates
Update fields on the record that triggers the flow to run. This high-performance flow runs *before* the record is saved to the database.

✓ Actions and Related Records
Update any record and perform actions, like send an email. This more flexible flow runs *after* the record is saved to the database.

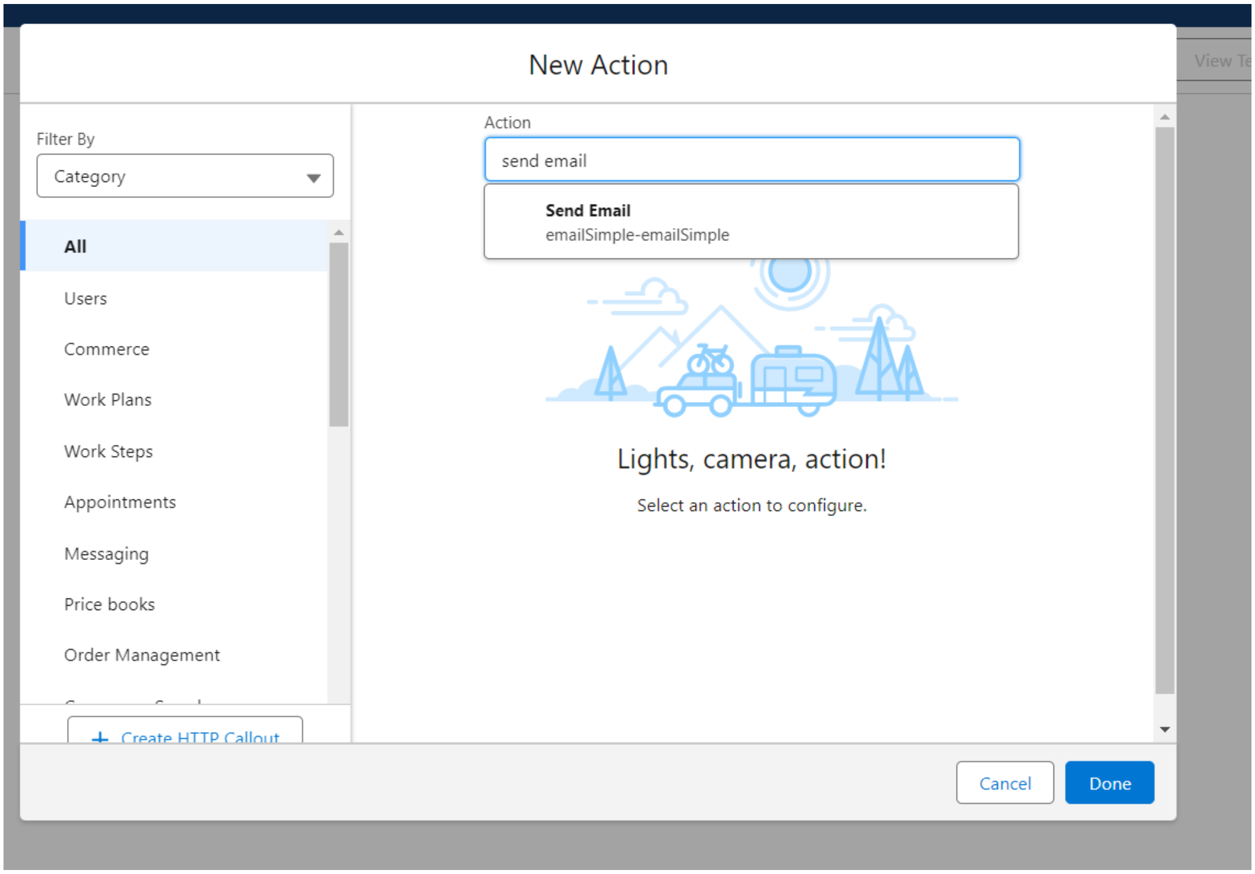
7. Under record trigger flow click on “+” icon and select action



In action search for send email then click on send email (check below image)

8. Label : send email

API Name : send_email



New Action

Filter By: Category

Action: send email

Send Email
emailSimple-emailSimple

Lights, camera, action!

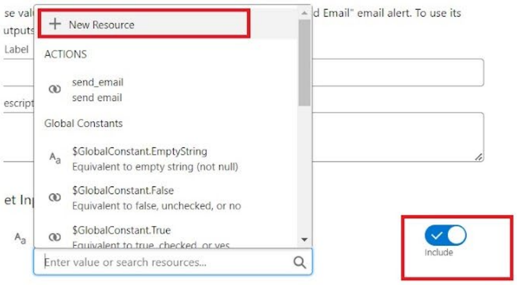
Select an action to configure.

9. Label : send email

10. API Name : send_email

11. Enable Body

12. Click on new resource


se val
utputs
Label
escript
et In
+ New Resource
ACTIONS
send_email
send email
Global Constants
$GlobalConstant.EmptyString
Equivalent to empty string (not null)
$GlobalConstant.False
Equivalent to false, unchecked, or no
$GlobalConstant.True
Equivalent to true, checked, or yes
Enter value or search resources...
d Email" email alert. To use its
Include

Under resource type select “Text Template”

API Name : emailbody

Under body: (paste the below text)

Dear {!$Record.Tenant__r.Name},

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.

14. Click Done.

15. Enable recipient Address List

Paste this ?{!$Record.Tenant__r.Email__c}

16. Click Done

17. Enable subject

Pate this >> Confirmation of Successful Monthly Payment

18. Click on save

Flow label : monthly payment

Flow API Name : monthly_payment

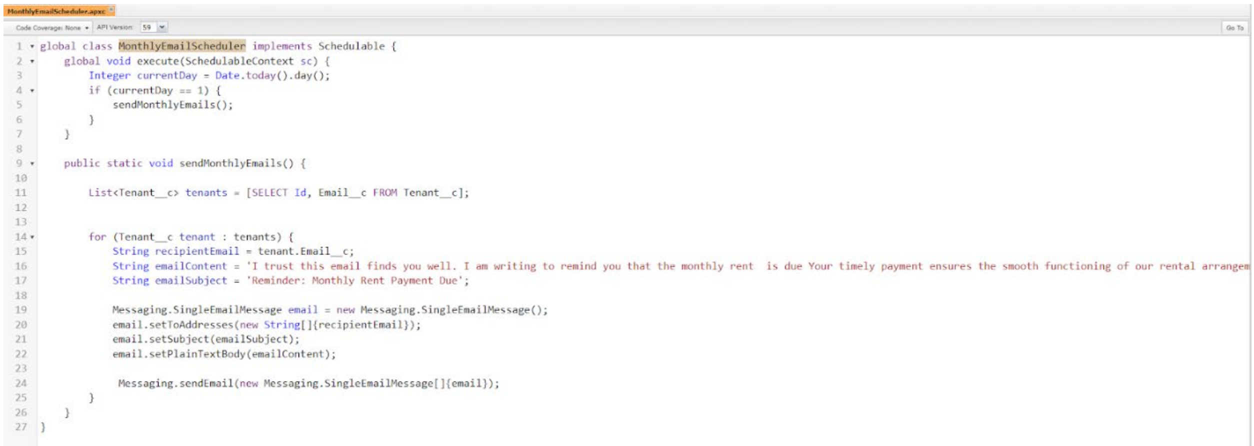
Click on activate

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.



```
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 arrangem
            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});
        }
    }
}
```

Apex logic:

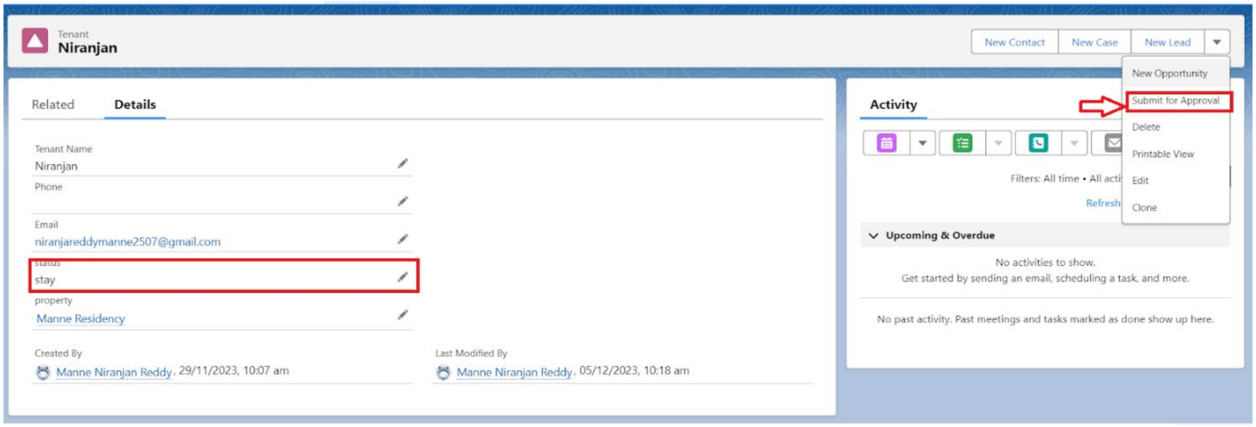
```
global class MonthlyEmailScheduler implements Schedulable {

    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
3. Enter job Name : MonthlyEmailScheduler
4. Apex class : MonthlyEmailScheduler
5. Frequency : Monthly===>select on day 1
6. Start date : 04/12/2023
7. End date : 04/01/2024
8. Preferred start time : 09:00 am
9. save

After creating the page show like this:



Tenant
Niranjan

Tenant Name
Niranjan

Phone

Email
niranjareddymanne2507@gmail.com

status
stay

property
Manne Residency

Created By
Manne Niranjan Reddy, 29/11/2023, 10:07 am

Last Modified By
Manne Niranjan Reddy, 05/12/2023, 10:18 am

Filters: All time • All acti

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.

ADVANTAGES & DISADVANTAGES

- **Centralized Data** – All lease agreements, customer details, payment schedules, and related documents are stored in Salesforce, avoiding scattered records.
- **Automation** – Automates lease renewals, payment reminders, and approval workflows, reducing manual effort.
- **Integration** – Easily integrates with finance, accounting, and ERP systems for seamless invoicing and revenue tracking.
- **Analytics & Reporting** – Provides dashboards and reports for tracking lease revenue, expirations, utilization, and profitability.

- **Customer Experience** – Improves client interaction with quick access to lease details, digital signatures, and self-service portals.
- **Compliance & Audit Readiness** – Keeps an audit trail of all lease transactions, ensuring compliance with accounting standards (like IFRS 16 / ASC 842).
- **Scalability** – Handles multiple leases, assets, and geographies as the business grows without needing new software.
- **High Implementation Cost** – Customizing Salesforce for lease management may require additional licenses, consultants, or third-party apps.
- **Complex Setup** – Lease processes can be complex, and Salesforce often needs heavy customization to fully support them.
- **User Training Required** – Teams must be trained to use Salesforce lease modules effectively; otherwise adoption is slow.

CONCLUSION

The Lease Management system in Salesforce provides a **powerful, centralized, and automated platform** for handling lease agreements, payments, renewals, and compliance. By integrating with financial and operational systems, it enhances **efficiency, transparency, and customer experience**, while also offering **real-time insights** through reports and dashboards.

However, the project also highlights challenges such as **implementation cost, customization needs, and user training**, which must be addressed for successful adoption. Overall, Lease Management in Salesforce proves to be a **strategic solution** for organizations aiming to streamline operations, ensure compliance, and support business growth in a competitive environment.