

PROJECT TITLE: LEASE MANAGEMENT

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INTRODUCTION

Project Overview

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

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

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

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

Storing tenant details with personal and communication information.

Creating and monitoring lease agreements.

Tracking monthly rent payments and generating reminders.

Automating lease approval workflows to reduce delays and errors.

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

What is this project?

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

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

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

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

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

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



Purpose

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

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

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

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

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

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

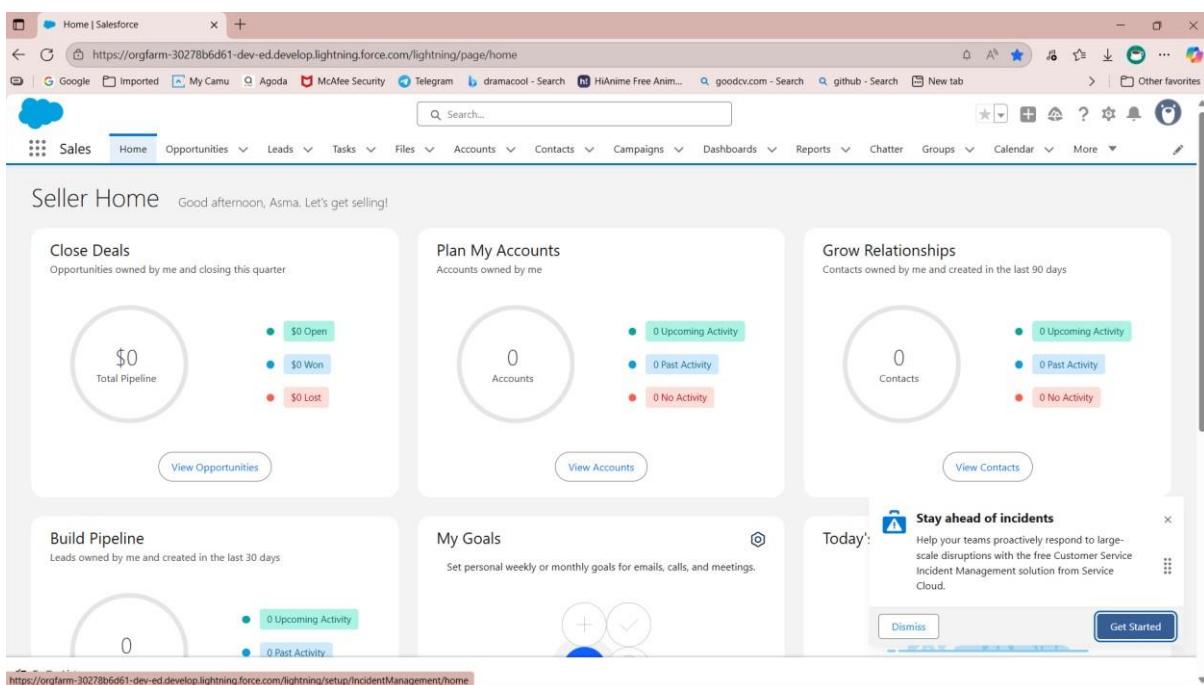
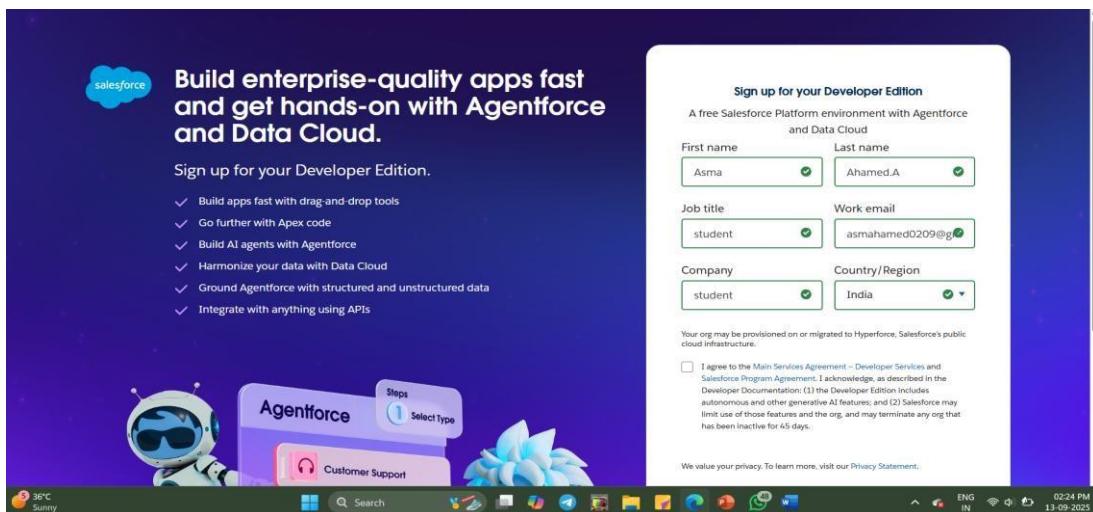
Scalability and Flexibility: Design the system to handle different types of rental assets (tents, shops, apartments, offices) and easily adapt to future enhancements.

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

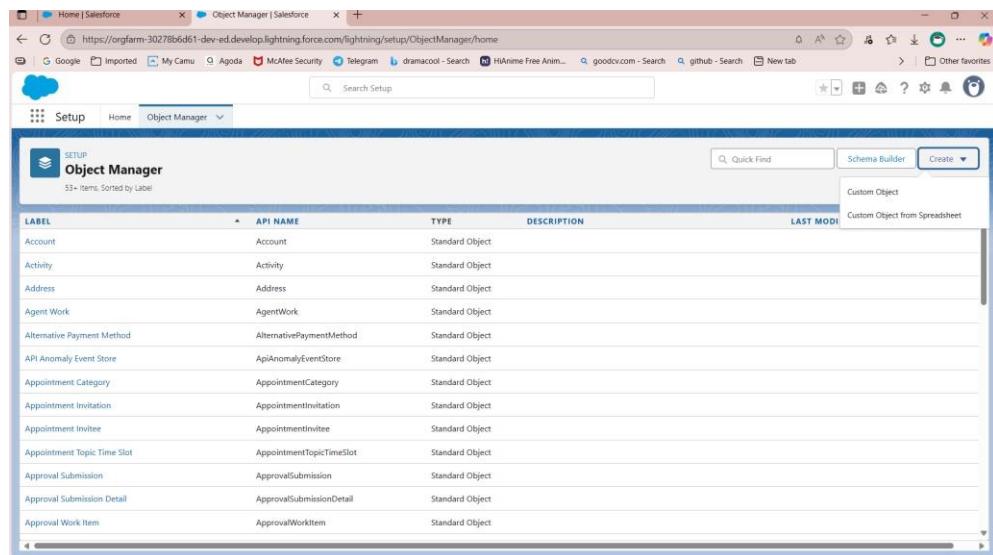
DEVELOPMENT PHASE

Creating Developer Account:

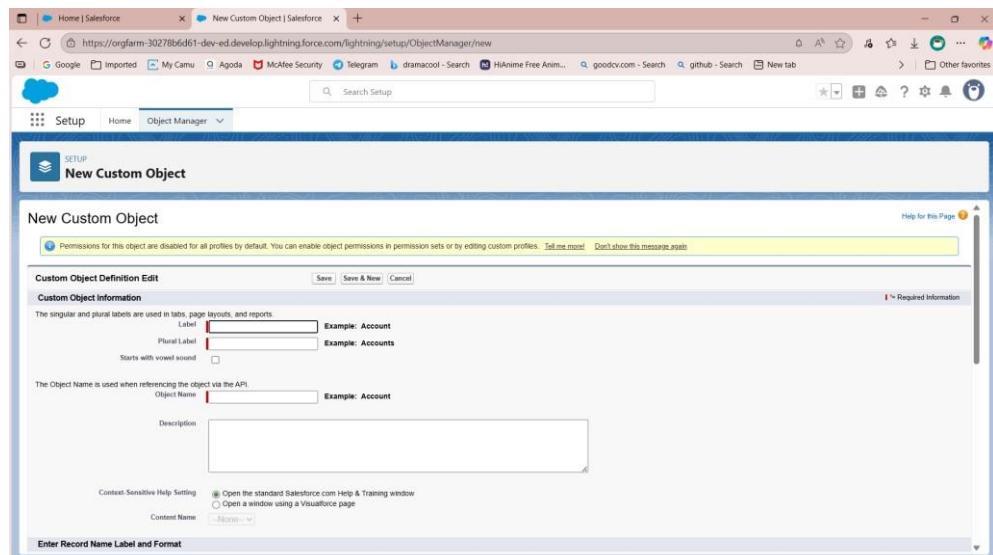
By using this URL - <https://www.salesforce.com/form/developer-signup/?d=pb>



CREATED OBJECTS: PROPERTY, TENANT, LEASE, PAYMENT



The screenshot shows the Salesforce Object Manager page. The title bar reads "Object Manager | Salesforce". The main content area is titled "Object Manager" with a sub-section "Custom Object". A table lists various standard objects with columns for Label, API Name, Type, Description, and Last Modified. The "Label" column includes Account, Activity, Address, Agent Work, Alternative Payment Method, API Anomaly Event Store, Appointment Category, Appointment Invitation, Appointment Invitee, Appointment Topic Time Slot, Approval Submission, Approval Submission Detail, and Approval Work Item.



The screenshot shows the "New Custom Object" definition edit page. The title bar reads "New Custom Object | Salesforce". The main content area is titled "Custom Object Definition Edit" with a sub-section "Custom Object Information". It includes fields for "Label" (set to "Account"), "Plural Label" (set to "Accounts"), and "Starts with vowel sound" (unchecked). Below these, there's a section for "The Object Name is used when referencing the object via the API" with a field for "Object Name" (set to "Account"). There's also a "Description" text area and a "Content Name" dropdown set to "None". At the bottom, there are "Save", "Save & New", and "Cancel" buttons.

https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/setup/Custome... address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3FretURL%3D%252F011gK... A ⚡ 🔍

Setup Home
Salesforce Go
Service Setup Assistant
Commerce Setup Assistant
Field Service Setup Home (Beta)
Hyperforce Assistant
Release Updates
Salesforce Mobile App
Lightning Usage Optimizer
Sales Cloud Everywhere
ADMINISTRATION
Users
Data
Email
PLATFORM TOOLS
Subscription Management
Apps

SETUP Tabs

New Custom Object Tab

Step 1. Enter the Details

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

New Custom Object Tab

Select an existing custom object or [create a new custom object now](#)

Object: Property ▾
Tab Style: Building

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.
Splash Page Custom Link: None

Enter a short description.

Description:

Next Cancel

Manager ▾

SETUP Tabs

New Custom Object Tab

Step 2. Add to Profiles

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

Profile:

- Analytics Cloud Integration User
- Analytics Cloud Security User
- Anypoint Integration
- Authenticated Website
- Authenticated Website
- B2B Reordering Portal Buyer Profile
- Contract Manager
- Cross Org Data Proxy User
- Custom Marketing Profile
- Custom: Sales Profile
- Custom: Support Profile
- Customer Community Login User
- Customer Community Plus Login User
- Customer Community Plus User

Tab Visibility:

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

Help for this Page

Step 2 of 3

SETUP Tabs

Step 3. Add to Custom Apps

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

Custom App:

- Platform (standard_Platform)
- Sales (standard_Sales)
- Service (standard_Service)
- Marketing CRM Classic (standard_Marketing)
- Sample Console (standard_ServiceConsole)
- High Volume Customer Portal User
- Authenticated Website User
- App Launcher (standard_AppLauncher)
- Community (standard_Community)
- Site.com (standard_Sites)
- Salesforce Chatter (standard_Chatter)
- Content (standard_Content)
- Analytics Studio (standard_Insights)
- Sales Console (standard_LightningSalesConsole)
- Service Console (standard_LightningService)
- Sales (standard_LightningSales)
- Lightning Usage App (standard_LightningInstrumentation)
- Digital Experiences (standard_SalesforceCMS)

Tab Visibility:

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

Help for this Page

Step 3 of 3

SETUP > OBJECT MANAGER

Tenant

Details
Edit Custom Object Tenant
Help for this Page

Custom Object Definition Edit

Save **Save & New** **Cancel**

Custom Object Information

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

Label	Tenant	Example: Account
Plural Label	Tenants	Example: Accounts

Starts with vowel sound

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

Object Name	Tenant	Example: Account
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Description

Context-Sensitive Help Setting

Open the standard Salesforce.com Help & Training window

Open a window using a Visualforce page

Content Name

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name	Tenant Name	Example: Account Name
-------------	-------------	-----------------------

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

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup' (selected), 'Home', 'Object Manager', and a search bar. The left sidebar lists various setup categories like 'Quick Find', 'Setup Home', 'Salesforce Go', etc. The main content area is titled 'New Custom Object Tab' under 'Step 1: Enter the Details'. It asks to choose a custom object for the tab. A dropdown menu shows 'Object' set to 'Contact' and 'Tab Style' set to 'People'. Below this, there's an optional field for a splash page custom link. The bottom section has a 'Description' input field and navigation buttons 'Next' and 'Cancel'.

Manager ▾

 SETUP
Tabs

New Custom Object Tab

Step 2. Add to Profiles Help for this Page 

Step 2 of 3

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

Apply one tab visibility to all profiles Default On Apply a different tab visibility for each profile

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

SETUP Tabs

Step 3. Add to Custom Apps

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

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

Step 3 of 3

SETUP > OBJECT MANAGER Tenant

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

Fields & Relationships

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

Edit Delete

SETUP > OBJECT MANAGER Tenant

Fields & Relationships
4 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)	✓	
Tenant Name	Name	Text(80)	✓	▼

Fields & Relationships

Conditional Field Formatted

Details

Fields & Relationships

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

SETUP > OBJECT MANAGER

Tenant

Fields & Relationships

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

External Lookup Relationship

- External Lookup Relationship
- Checkbox
- Currency
- Date
- Date/Time
- Email
- Geolocation
- Number
- Percent
- Phone
- Picklist
- Picklist (Multi-Select)
- Text
- Text Area
- Text Area (Long)
- Text Area (Rich)
- Text (Encrypted) 1
- Time
- URL

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

Allows users to select a True (checked) or False (unchecked) value.
 Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
 Allows users to enter a date or pick a date from a pop-up calendar.
 Allows users to enter a date and time, or pick a date from a pop-up calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
 Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
 Allows users to enter locations. Includes latitude and longitude components, and can be used to calculate distance.
 Allows users to enter any number. Leading zeros are removed.
 Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
 Allows users to enter any phone number. Automatically formats it as a phone number.
 Allows users to select a value from a list you define.
 Allows users to select multiple values from a list you define.
 Allows users to enter any combination of letters and numbers.
 Allows users to enter up to 255 characters on separate lines.
 Allows users to enter up to 131,072 characters on separate lines.
 Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
 Allows users to enter any combination of letters and numbers and store them in encrypted form.
 Allows users to enter a local time. For example, '2:40 PM', '14:40', '14:40:00', and '14:40:50:000' are all valid times for this field.
 Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

SETUP > OBJECT MANAGER

Tenant

Fields & Relationships

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

New Custom Field

Step 2. Enter the details

Field Label: Phone

Field Name: Phone

Description:

Help Text:

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

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

Default Value: Show Formula Editor

Use formula editor. Enclose text and picker value API names in double quotes ("Phone", "url"), include numbers without quotes (123), while percentages as decimal (.10), and express date calculations in the standard format: (Today + 7).
reference a field from a Custom Metadata type record use: %CustomMetadataType__r.name%{!Name}__c

Step 2 of 4

Previous Next Cancel

Help for this Page ?

Tenant

New Custom Field

Step 3. Establish field-level security

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

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

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

Step 3 of 4

Previous Next Cancel

SETUP > OBJECT MANAGER
Tenant

Fields & Relationships

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

Tenant New Custom Field

Step 4. Add to page layouts Step 4 of 4

Field Label	Phone
Data Type	Phone
Field Name	Phone
Description	

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

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

Add Field Page Layout Name Tenant Layout

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

Previous Save & New Save Cancel

https://orgfarm-30278b6d61-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgk000002EckP/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER
Tenant

Fields & Relationships 5 Items. Sorted by Field Label

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

Quick Find New Deleted Fields Field Dependencies Set History Tracking

Details

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

The screenshot shows the Salesforce Setup interface with the URL <https://orgfarm-30278b6d61-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgK000002EcKp/FieldsAndRelationships/new>. The page title is "SETUP > OBJECT MANAGER" and the sub-section is "Tenant". On the left, there's a sidebar with navigation links like "Setup", "Home", "Object Manager", and "Conditional Field Formulation". A search bar at the top right contains the placeholder "Search Setup". The main content area displays a table of field types with their descriptions:

Details	Description
<input type="radio"/> External Lookup Relationship	The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list. Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
<input type="radio"/> Checkbox	Allows users to enter a True (checked) or False (unchecked) value.
<input type="radio"/> Currency	Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
<input type="radio"/> Date	Allows users to enter a date or pick a date from a calendar.
<input type="radio"/> Date/Time	Allows users to enter a date and time, or pick a date from a popup calendar.
<input checked="" type="radio"/> 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.
<input type="radio"/> Geolocation	Allows users to define locations, includes latitude and longitude components, and can be used to calculate distance.
<input type="radio"/> Number	Allows users to enter any number. Leading zeros are removed.
<input type="radio"/> Percent	Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
<input type="radio"/> Phone	Allows users to enter any phone number. Automatically formats it as a phone number.
<input type="radio"/> Picklist	Allows users to select a value from a list you define.
<input type="radio"/> Picklist (Multi-Select)	Allows users to select multiple values from a list you define.
<input type="radio"/> Text	Allows users to enter any combination of letters and numbers.
<input type="radio"/> Text Area	Allows users to enter up to 255 characters on separate lines.
<input type="radio"/> Text Area (Long)	Allows users to enter up to 131,072 characters on separate lines.
<input type="radio"/> Text Area (Rich)	Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
<input type="radio"/> Text (Encrypted)	Allows users to enter any combination of letters and numbers and store them in encrypted form.
<input type="radio"/> Time	Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50:000" are all valid times for this field.
<input type="radio"/> URL	Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

The screenshot shows the Microsoft Dynamics 365 Object Manager interface. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar. Below the navigation is a breadcrumb trail 'SETUP > OBJECT MANAGER' and the page title 'Tenant'. On the left, a sidebar lists various setup categories like 'Details', 'Fields & Relationships', 'Page Layouts', etc. The main content area is titled 'New Custom Field' under the 'Tenant' section. It's Step 2 of 4, 'Enter the details'. The field label is 'Email', and the field name is also 'Email'. There is a large empty box for 'Description'. Under 'Help Text', there is a text input field. In the 'Required' section, there are three checkboxes: 'Always require a value in this field in order to save a record' (unchecked), 'Do not allow duplicate values' (unchecked), and 'Set this field as the unique record identifier from an external system' (unchecked). Below these is a checkbox 'Add this field to existing custom report types that contain this entity' which is checked. At the bottom, there is a 'Show Formula Editor' button and a note about formula syntax. Navigation buttons 'Previous', 'Next', and 'Cancel' are at the bottom right.

SETUP > OBJECT MANAGER

Tenant

New Custom Field

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

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

Conditional Field Expressions

Setup Home Object Manager

SETUP > OBJECT MANAGER Tenant

New Custom Field

Step 4. Add to page layouts Step 4 of 4

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

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

Add Field Page Layout Name
 Tenant Layout

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

Help for this Page

Previous Save & New Save Cancel

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

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

Setup Home Object Manager

New Custom Object

Custom Object Definition Edit

Custom Object Information

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

Label: Lease Agreement Example: Account
Plural Label: Lease Agreements Example: Accounts
Starts with vowel sound:

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

Object Name: Lease_Agreement_c Example: Account

Description:

Context Sensitive Help Setting: Open the standard Salesforce.com Help & Training window
Content Name: None

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name: Lease Agreement Name Example: Account Name
Data Type: Auto Number Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.

Setup Home Object Manager

SETUP > TABS Guidance Center

New Custom Object Tab

Step 1. Enter the Details Step 1 of 3

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

New Custom Object Tab

Required information

Select an existing custom object or create a new custom object now.
Object: Lease Agreement
Tab Style: Form

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.
Splash Page Custom Link: None

Enter a short description.

Next Cancel

Quick Find

Setup Home
Salesforce Go
Service Setup Assistant
Commerce Setup Assistant
Field Service Setup Home (Beta)
Hyperforce Assistant
Release Updates
Salesforce Mobile App
Lightning Usage
Optimizer
Sales Cloud Everywhere
ADMINISTRATION
> Users
> Data
> Email
PLATFORM TOOLS
> Subscription Management
> Apps
> Feature Settings
> Slack
> Data Cloud

Screenshot of the Salesforce Setup interface showing the 'Tabs' configuration page.

New Custom Object Tab

Step 2. Add to Profiles

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

Apply one tab visibility to all profiles (Default On) Apply a different tab visibility for each profile

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

Screenshot of the Salesforce Setup interface showing the 'Tabs' configuration page, Step 3.

Step 3. Add to Custom Apps

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

Include Tab

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

Screenshot of the Salesforce Setup interface showing the 'Object Manager' page for the 'Lease Agreement' object.

Lease Agreement

Details

Fields & Relationships	Description
Page Layouts	API Name
Lightning Record Pages	Lease_Agreement_c_c
Buttons, Links, and Actions	Custom
Compact Layouts	Singular Label
Field Sets	Lease Agreement
Object Limits	Plural Label
Record Types	Lease Agreements
Related Lookup Filters	
Restriction Rules	
Scoping Rules	
Object Access	
Triggers	
Flow Triggers	
Validation Rules	

Details

Enable Reports
Track Activities
Track Field History
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window

<https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01l0k0000002EoB/Details/view>

Tenant | Salesforce Lease Agreement | Salesforce

https://orgfarm-30278bd61-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01gK000002EgjB/FieldsAndRelationships/view

Setup Home Object Manager Search

Lease Agreement

SETUP > OBJECT MANAGER

Lease Agreement

Fields & Relationships

4 items. Sorted by Field Label

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

Details

Fields & Relationships

Page Layouts

Lightning Record Page

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

Conditional Field Formatted

Setup Home Object Manager

Lease Agreement

Details

Fields & Relationships

- None Selected
- Auto Number
- Formula
- Roll-Up Summary
- Lookup Relationship
- Master-Detail Relationship
- External Lookup Relationship
- Checkbox
- Currency
- Date
- DateTime
- Email
- Geolocation
- Number
- Percent
- Phone
- Picklist

Select one of the data types below.

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

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

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

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

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 parent record's ID is used to identify the detail records.
- When a user deletes the master record, all detail records are deleted.
- You can create roll-up summary fields on the master record to summarize the detail records.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Setup Home Object Manager

Lease Agreement

Details

Fields & Relationships

New Custom Field

Step 2. Enter the details

Field Label: Start Date

Field Name: Start_Date

Description:

Help Text:

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

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

Default Value: Show Formula Editor

Use formula syntax. Enclose text and posted value API names in double quotes ("Text", "Post"). Include numbers without quotes (10). Use formula ranges as decimal (0-100) and express date calculations in the standard format ("Today") + 7d referencing a field from a Custom Metadata type record use \$CustomMetadataType__id__r.RecordName.FieldName

Step 2 of 4

Previous Next Cancel

Setup Home Object Manager

Lease Agreement

Details

Fields & Relationships

New Custom Field

Step 3. Establish field-level security

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

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

Step 3 of 4

Previous Next Cancel

Setup Home Object Manager

SETUP > OBJECT MANAGER Lease Agreement

Lease Agreement

New Custom Field

Step 4. Add to page layouts Step 4 of 4

Field Label	Start Date
Data Type	Date
Field Name	Start_Date
Description	

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

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

Add Field Page Layout Name Lease Agreement Layout

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

Help for this Page

Previous Save & New Save Cancel

Tenant | Salesforce Lease Agreement | Salesforce

https://orgfarm-30278b6d61-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgk000002EgJB/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER Lease Agreement

Fields & Relationships 5 items. Sorted by Field Label

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

Quick Find New Deleted Fields Field Dependencies Set History Tracking

https://orgfarm-30278b6d61-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgk000002EgJB/FieldsAndRelationships/new

Setup Home Object Manager

SETUP > OBJECT MANAGER Lease Agreement

Fields & Relationships

Select one of the data types below:

- None Selected
- 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 pop-up list. The other object is the source of the values in the list.
 - The relationship field is required on all detail records.
 - The ownership and sharing of a detail record are determined by the master record.
 - When a user deletes the master record, all detail records are deleted.
 - When a user deletes a detail record, the master record is updated to reflect the changes made to the detail records.
- Master-Detail Relationship: Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
 - The relationship field is required on all detail records.
 - The ownership and sharing of a detail record are determined by the master record.
 - When a user deletes the master record, all detail records are deleted.
 - When a user deletes a detail record, the master record is updated to reflect the changes made to the detail records.
- External Lookup Relationship: Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
- Checkbox: Allows users to select a True (checked) or False (unchecked) value.
- Currency: Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
- Date: Allows users to enter a date and time, or pick a date from a pop-up calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
- Date/Time: 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.
- Email: Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
- Geolocation: Allows users to enter any number. Leading zeros are removed.
- Number: Allows users to enter a percentage number, for example, "10" and automatically adds the percent sign to the number.
- Percent: Allows users to enter any phone number. Automatically formats it as a phone number.
- Phone: Allows users to select a value from a list you define.
- Picklist: Allows users to select multiple values from a list you define.

Setup > Object Manager

Lease Agreement

Fields & Relationships

Lease Agreement
New Custom Field

Step 2. Enter the details Step 2 of 4

Field Label	End Date
Field Name	End_Date
Description	
Help Text	
Required	<input type="checkbox"/> Always require a value in this field in order to save a record
Auto add to custom report type	<input checked="" type="checkbox"/> Add this field to existing custom report types that contain this entry
Default Value	Show Formula Editor
Use formula editor. Enclose text and print value API names in double quotes ("Name", "Id"). Include numbers without commas (20), show percentages as decimal (.010), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: @CustomMetadataType__name__notRecordName__Field__c	

Previous Next Cancel

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

Setup > Object Manager

Lease Agreement

Fields & Relationships

Lease Agreement
New Custom Field

Step 4. Add to page layouts Step 4 of 4

Field Label	End Date
Data Type	Date
Field Name	End_Date
Description	

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

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

Add Field Page Layout Name
 Lease Agreement Layout

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

Previous Save & New Save Cancel

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

Setup > Object Manager

Lease Agreement

Fields & Relationships

6 items. Sorted by Field Label

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

Quick Find New Deleted Fields Field Dependencies Set History Tracking

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

Setup Home Object Manager Search Setup

Lease Agreement

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Conditional Field Formulas

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

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

External Lookup Relationship

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

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

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

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

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

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

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

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

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

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

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

Allows users to enter any combination of letters and numbers.

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

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

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

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

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

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

Next Cancel

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

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

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

External Lookup Relationship

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

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

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

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

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

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

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

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

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

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

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

Allows users to enter any combination of letters and numbers.

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

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

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

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

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

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

Next Cancel

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

Setup Home Object Manager

Lease Agreement

New Custom Field

Step 2. Enter the details Step 2 of 4

Field Label	Monthly Rent
Length	18
Field Name	Monthly_Rent
Description	
Help Text	
Required	<input type="checkbox"/> Always require a value in this field in order to save a record
Auto add to custom report type	<input checked="" type="checkbox"/> Add this field to existing custom report types that contain this entity
Default Value	Show Formula Editor

Use formula editor: Enclose text and decimal value API names in double quotes ("Name_Value"). Include numbers without quotes. To reference a field from a Custom Metadata type record use \${CustomMetadata_Type__name__RecordName.FieldName}.

Previous Next Cancel

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

Setup Home Object Manager

Lease Agreement

New Custom Field

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

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

Previous Next Cancel

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

Setup Home Object Manager Search Setup

Lease Agreement

New Custom Field

Step 4 of 4

Field Label	Monthly Rent
Data Type	Currency
Field Name	Monthly_Rent
Description	

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

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

Add Field Page Layout Name
 Lease Agreement Layout

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

Previous Save & New Save Cancel

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

Setup Home Object Manager Search Setup

Lease Agreement

Fields & Relationships

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 Agreement Name	Name	Auto Number		
Monthly Rent	Monthly_Rent_c	Currency(18, 0)		
Owner	OwnerId	Lookup(User,Group)		
Start Date	Start_Date_c	Date		

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

Setup Home Object Manager Search Setup

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Fields & Relationships

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

Data Type

None Selected

Select one of the data types below:

- Auto Number
- Formula
- Roll Up Summary

Lookup Relationship

Master-Detail Relationship

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

External Lookup Relationship

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

Standard Data Types

- Checkbox
- Currency
- Date
- Date/Time
- Email
- Geolocation
- Long Text
- Long Text Area
- Number
- Percent
- Text
- URL

Custom Data Types

- Attachment
- Content Version
- Content Document
- Content File
- Content Record
- Custom Object
- Custom Setting
- Event
- File
- Location
- Note
- Task
- User

Relationship Fields

- Child Relationship
- Parent Relationship

Validation Rules

Conditional Field Formulas

Next Cancel

<https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01gK000002EgjB/FieldsAndRelationships/new>

Lease Agreement

Lease Agreement New Relationship

Step 2. Choose the related object

Select the other object to which this object is related

Related To: -None-

Property

Query Editor

Queue

Quick Text

Help for this Page

Step 2

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Previous | Next | Cancel

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<https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01gK000002EgjB/FieldsAndRelationships/new>

Lease Agreement

New Relationship

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

Field Label: Property

Field Name: Property

Description:

Help Text:

Child Relationship Name: Lease_Agreements

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

What to do if the lookup record is deleted?

Don't allow deletion of the lookup record that's part of a lookup relationship.
 Add this field to existing custom report types that contain this entity

Auto add to custom report type

Lookup Filter

Optional: create a filter to limit the records available to users in the lookup field [Tell me more!](#)

Show Filter Settings

Step 3 of 4

Previous | Next | Cancel

Previous | Next | Cancel

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Flow Triggers

Validation Rules

Conditional Field Formatters

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

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

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

Previous Next Cancel

Lease Agreement

New Relationship

Help for this Page

Step 6. Add custom related lists

Step 6 of 6

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

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

Related List Label: Lease Agreements

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

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

Add Related List: Page Layout Name
 Property Layout

Append related list to users' existing personal customizations

Previous Save & New Save Cancel

Setup Home Object Manager

Lease Agreement

Step 1. Choose the field type

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 pop-up list. The other object is the source of the values in the list.

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

- The relationship field is required on all detail records.
- A user can enter a single value of a master record if all detail records are deleted.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

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

Master-Detail Relationship

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

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

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

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

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

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

Step 1 Next Cancel

https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01gK000002EgIB/FieldsAndRelationships/new

Setup Home Object Manager

Lease Agreement

New Relationship

Step 2. Choose the related object

Select the other object to which this object is related.

Related To

Help for this Page Previous Next Cancel

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

Setup Home Object Manager

Lease Agreement

Lease Agreement New Relationship

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

Field Label: Tenant
Field Name: Tenant
Description:
Help Text:

Child Relationship Name: Lease_Agreements
Required: Always require a value in this field in order to save a record
What to do if the lookup record is deleted?
 Clear the value of this field. You can't choose this option if you make this field required.
 Don't allow deletion of the lookup record that's part of a lookup relationship.

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

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

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

Setup Home Object Manager

Lease Agreement

Fields & Relationships

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

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

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

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

Setup Home Object Manager

Lease Agreement

Lease Agreement New Relationship

Step 8. Add reference field to Page Layouts

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

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

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

Add Field Page Layout Name: Lease Agreement Layout

https://orgfarm-30278b6d61-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgK000002EgjB/FieldsAndRelationships/new

Setup Home Object Manager Search Setup

Lease Agreement

Lease Agreement
New Relationship

Step 6. Add custom related lists Step 6 of 6

Field Label Tenant
Data Type Lookup
Field Name Tenant
Description

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

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.
Add Related List Page Layout Name
 Tenant Layout
 Append related list to users' existing personal customizations

Previous Save & New Save Cancel

https://orgfarm-30278b6d61-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgK000002EgjB/FieldsAndRelationships

Setup Home Object Manager Search Setup

Lease Agreement

Details Fields & Relationships

9 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 Agreement Name	Name	Auto Number		
Monthly Rent	Monthly_Rent__c	Currency(18, 0)		
Owner	OwnerId	Lookup(User,Group)		
Property	Property__c	Lookup(Property)		
Start Date	Start_Date__c	Date		
Tenant	Tenant__c	Lookup(Tenant)		

Quick Find New Deleted Fields Field Dependencies Set History Tracking

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

New Custom Object

Custom Object Definition Edit

Custom Object Information

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

Label: Payment Example: Account
 Plural Label: Payments Example: Accounts
 Starts with vowel sound

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

Object Name: Payment_c Example: Account

Description:

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

Content Name: --None--

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name: Payment Name Example: Account Name

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

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

Tabs

New Custom Object Tab

Step 1. Enter the Details

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

New Custom Object Tab

Select an existing custom object or [create a new custom object now](#).

Object: Payment Tab Style: Blank

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.
 Splash Page Custom Link: --None--

Enter a short description.

Description:

Next | Cancel

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

Setup Home Object Manager

SETUP > OBJECT MANAGER
Payment

Details

Fields & Relationships	Description
Page Layouts	API Name
Lightning Record Pages	Payment_c_c
Buttons, Links, and Actions	Custom
Compact Layouts	✓
Field Sets	Singular Label
Object Limits	Payment
Record Types	Plural Label
Related Lookup Filters	Payments
Restriction Rules	
Scoping Rules	
Object Access	
Triggers	
Flow Triggers	
Validation Rules	

Enable Reports

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

Edit **Delete**

https://orgfarm-30278b6d61-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgK000002Ejgr/FieldsAndRelationships

SETUP > OBJECT MANAGER
Payment

Fields & Relationships

4 Items, Sorted by Field Label

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

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

Conditional Field Formatters

https://orgfarm-30278b6d61-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgK000002Ejgr/FieldsAndRelationships

SETUP > OBJECT MANAGER
Payment

Fields & Relationships

New Relationship

Step 2. Choose the related object

Select the other object to which this object is related

Related To: **Messaging User**

Help for this Page

Step 2

Previous Next Cancel

Setup Home Object Manager

SETUP > OBJECT MANAGER
Payment

Payment New Relationship

Step 4. Establish field-level security for reference field Step 4 of 6

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

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

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

Help for this Page

Previous Next Cancel

Setup Home Object Manager

SETUP > OBJECT MANAGER
Payment

Payment New Relationship

Step 6. Add custom related lists Step 6 of 6

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

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

Related List Label: Payments

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

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

Add Related List: Page Layout Name
 Lease Agreement Layout

Append related list to users' existing personal customizations

Previous Save & New Save Cancel

Setup | Home | Object Manager | Search Setup

Payment

Fields & Relationships

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

Setup | Home | Object Manager | Search Setup

Payment

Fields & Relationships

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

Setup | Object Manager | Payment

New Custom Field

Step 2. Enter the details

Field Label: Amount

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

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

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

Field Name: Description
Help Text:

Required: Always require a value in this field in order to save a record
Auto add to custom report type: Add this field to existing custom report types that contain this entity

Default Value: Show Formula Editor

Use formula editor. Formula can contain static values or variables. (The 'var' object holds numbers without quotes.) Use formula editor to calculate percentages as decimals (0.10) and express new calculations in the standard format (10%) or reference a field from a Custom Metadata type record like: \$CustomMetadata__Type__RecordName__Field__

https://orgfarm-30278b6d61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000002Ejgr/FieldsAndRelationships/new

Payment

New Custom Field

Step 4. Add to page layouts

Field Label: Amount
Data Type: Currency
Field Name: Amount
Description:

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

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

Add Field Page Layout Name
 Payment Layout

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

Previous Save & New Save Cancel

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

Payment

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount_c	Currency(18,0)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Lease Agreement	Lease_Agreement_c	Lookup(Lease Agreement)	✓	
Owner	OwnerId	Lookup(User,Group)	✓	
Payment Name	Name	Auto Number	✓	

GROUP THEM TOGETHER INTO ONE CUSTOM APP

The screenshot shows the Salesforce Setup Home page. On the left, there is a sidebar with a tree view of the 'Salesforce Mobile App' category, including sections for Data, Apps, Connected Apps, External Client Apps, Lightning Bolt, and Mobile Apps. The 'Apps' section is expanded, showing 'App Manager' and 'AppExchange Marketplace'. The main content area displays a 'SETUP Home' dashboard with four cards: 'Data Cloud' (Setup), 'Get Started with Einstein Bots' (Setup), 'Mobile Publisher' (Setup), and 'Join the Trailblazer Community' (Setup). Below the dashboard, there is a section titled 'Most Recently Used' with a table showing 10 items:

NAME	TYPE	OBJECT
Amount	Custom Field Definition	Payment
Lease Agreement	Custom Field Definition	Payment
Payments	Custom Tab Definition	Payment
Payment	Custom Object Definition	
Tenant	Custom Field Definition	Lease Agreement

The screenshot shows the 'Lightning Experience App Manager' page. The sidebar on the left is identical to the one in the previous screenshot. The main content area is titled 'Lightning Experience App Manager' and shows a table of 28 installed apps, sorted by App Name. The table includes columns for App Name, Developer Name, Description, Last Modified, App Type, and Version.

App Name	Developer Name	Description	Last Modified	App Type	Version
All Tabs	AllTabSet	Build CRM Analytics dashboards and apps	7/9/2025, 10:08 PM	Classic	v1
Analytics Studio	Insights	Build CRM Analytics dashboards and apps	7/9/2025, 10:08 PM	Classic	v1
App Launcher	Applauncher	App Launcher tabs	7/9/2025, 10:08 PM	Classic	v1
Approvals	Approvals	Manage approvals and approval flows	7/9/2025, 10:08 PM	Lightning	v1
Automation	FlowsApp	Automate business processes and repetitive tasks.	7/9/2025, 10:17 PM	Lightning	v1
Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	7/9/2025, 10:08 PM	Lightning	v1
Community	Community	Salesforce CRM Communities	7/9/2025, 10:08 PM	Classic	v1
Content	Content	Salesforce CRM Content	7/9/2025, 10:08 PM	Classic	v1
Data Cloud	Audience360	Build a thorough and complete understanding of your customers.	7/9/2025, 10:08 PM	Lightning	v1
Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	7/9/2025, 10:08 PM	Lightning	v1
Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	7/9/2025, 10:08 PM	Lightning	v1
How_We_Roll_Maintenance	How_We_Roll_Maintenance	How We Roll Maintenance	8/11/2025, 12:37 AM	Lightning	v1
Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	7/9/2025, 10:08 PM	Lightning	v1
Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	7/9/2025, 10:08 PM	Classic	v1
My Service Journey	MSIApp	Discover new customer service capabilities.	7/9/2025, 10:08 PM	Lightning	v1
Platform	Platform	The fundamental Lightning Platform	7/9/2025, 10:08 PM	Classic	v1
Queue Management	QueueManagement	Create and manage queues for your business.	7/9/2025, 10:08 PM	Lightning	v1

New Lightning App

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

App Details

- *App Name: Lease Management
- *Developer Name: Lease_Management
- Description: App to manage properties, tenants, leases, and payments.

App Branding

- Image:
- Primary Color Hex Value: #0070D2

Org Theme Options

- Use the app's image and color instead of the org's custom theme.

App Launcher Preview

Next

My Service Journey

15	Service Journey	Discover new customer service capabilities.	7/9/2025, 10:08 PM	Lightning
16	Platform	Platforms	7/9/2025, 10:08 PM	Classic
17	Queue Management	QueueManagement	7/9/2025, 10:08 PM	Lightning
18	Sales	Sales	7/9/2025, 10:08 PM	Classic

Mobile Apps

Salesforce

Mobile Builder for the Seller-Focused

New Lightning App

App Options

Navigation and Form Factor

- * Navigation Style
 - Standard navigation
 - Console navigation
- * Supported Form Factors
 - Desktop and phone
 - Desktop
 - Phone

Setup and Personalization

- Setup Experience**
 - Setup (full set of Setup options)
 - Service Setup
 - Data Cloud Setup
- App Personalization Settings**
 - Disable end user personalization of nav items in this app
 - Disable temporary tabs for items outside of this app
 - Use Omni-Channel sidebar

Next

New Lightning App

Available Items

Type to filter list...

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

Create ▾

Selected Items

- Properties
- Tenants
- Lease Agreements
- Payments

Back

Next

New Lightning App

Available Profiles

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

Selected Profiles

- System Administrator

Save & Finish

Category	App	Type	Description	Last Modified	Version
My Service Journey	msjapp	Platform	Discover new customer service capabilities.	7/9/2025, 10:08 PM	Lightning
Platform	Platform	Platform	The fundamental Lightning Platform	7/9/2025, 10:08 PM	Classic
Queue Management	QueueManagement	QueueManagement	Create and manage queues for your business.	7/9/2025, 10:08 PM	Lightning
Sales	Sales	Sales	The world's most popular sales force automation (SFA) solution	7/9/2025, 10:08 PM	Classic

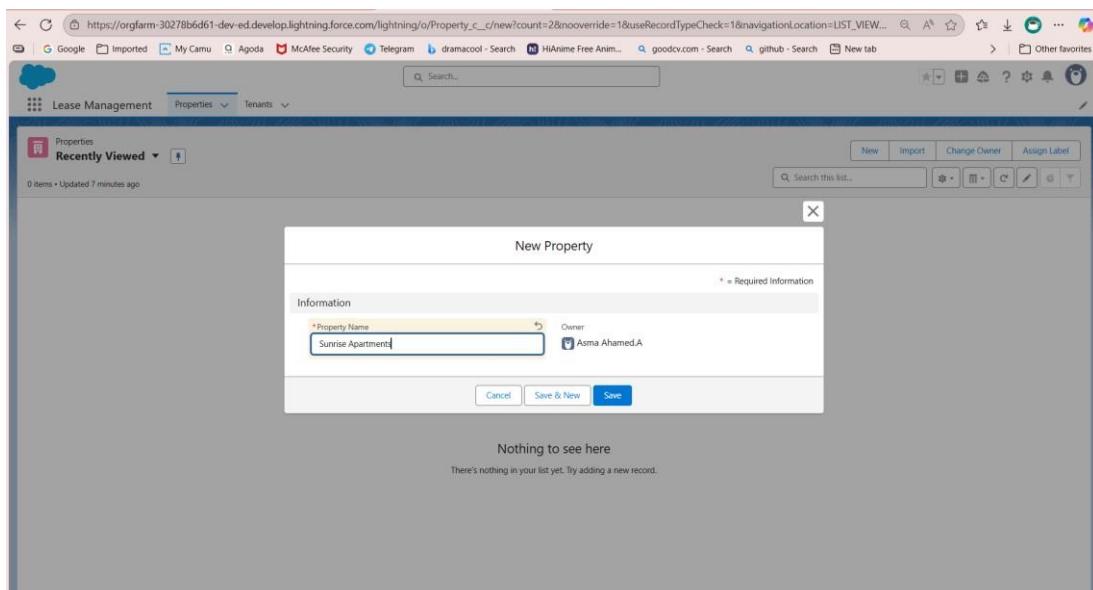
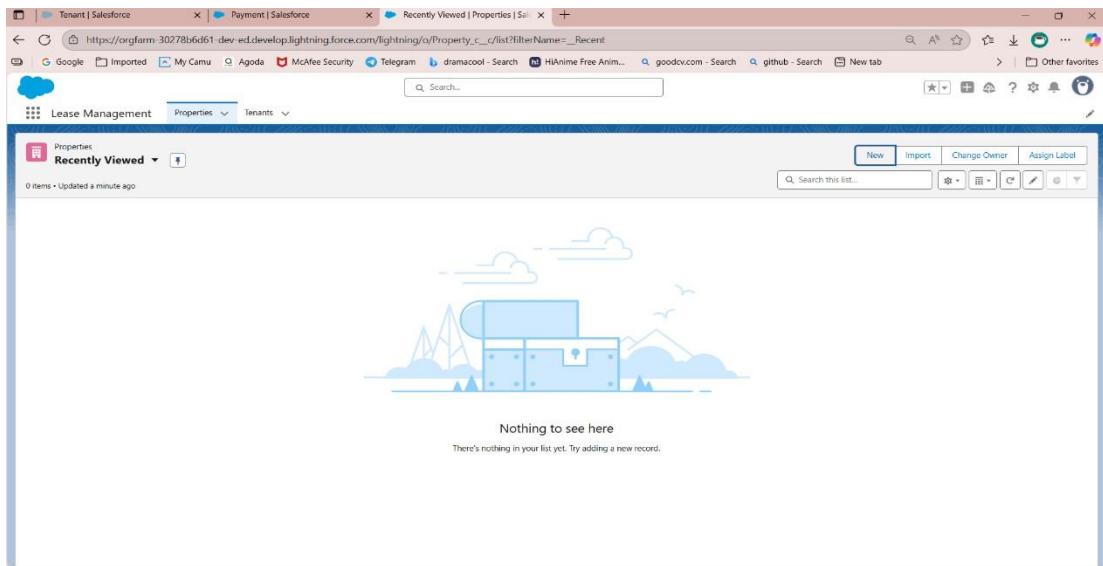
SETUP

Lightning Experience App Manager

29 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type, App Type

App Name	Developer Name	Description	Last Modified Date	App Type	Visible in ...
All Tabs	AllTabSet		7/9/2025, 10:08 PM	Classic	<input checked="" type="checkbox"/>
Analytics Studio	Insights	Build CRM Analytics dashboards and apps	7/9/2025, 10:08 PM	Classic	<input checked="" type="checkbox"/>
App Launcher	AppLauncher	App Launcher tabs	7/9/2025, 10:08 PM	Classic	<input checked="" type="checkbox"/>
Approvals	Approvals	Manage approvals and approval flows	7/9/2025, 10:08 PM	Lightning	<input checked="" type="checkbox"/>
Automation	FlowsApp	Automate business processes and repetitive tasks.	7/9/2025, 10:17 PM	Lightning	<input checked="" type="checkbox"/>
Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	7/9/2025, 10:08 PM	Lightning	<input checked="" type="checkbox"/>
Community	Community	Salesforce CRM Communities	7/9/2025, 10:08 PM	Classic	<input checked="" type="checkbox"/>
Content	Content	Salesforce CRM Content	7/9/2025, 10:08 PM	Classic	<input checked="" type="checkbox"/>
Data Cloud	Audience360	Build a thorough and complete understanding of your customers.	7/9/2025, 10:08 PM	Lightning	<input checked="" type="checkbox"/>
Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	7/9/2025, 10:08 PM	Lightning	<input checked="" type="checkbox"/>
Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	7/9/2025, 10:08 PM	Lightning	<input checked="" type="checkbox"/>
How We Roll Maintenance	How_We_Roll_Maintenance		8/1/2025, 12:37 AM	Lightning	<input checked="" type="checkbox"/>
Lease Management	Lease_Management	App to manage properties, tenants, leases, and payments.	9/14/2025, 2:51 AM	Lightning	<input checked="" type="checkbox"/>
Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	7/9/2025, 10:08 PM	Lightning	<input checked="" type="checkbox"/>
Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	7/9/2025, 10:08 PM	Classic	<input checked="" type="checkbox"/>
My Service Journey	MSIApp	Discover new customer service capabilities.	7/9/2025, 10:08 PM	Lightning	<input checked="" type="checkbox"/>
Platform	Platform	The fundamental Lightning Platform	7/9/2025, 10:08 PM	Classic	<input checked="" type="checkbox"/>
Queue Management	QueueManagement	Create and manage queues for your business.	7/9/2025, 10:08 PM	Lightning	<input checked="" type="checkbox"/>

READY TO ADD DATA:



Lease Management Properties Tenants

Property Sunrise Apartments

Related Details

Property Name: Sunrise Apartments

Owner: Asma Ahmed,A

Created By: Asma Ahmed,A - 9/14/2025, 3:20 AM

Last Modified By: Asma Ahmed,A - 9/14/2025, 3:20 AM

Activity

Filters: All time • All activities • All types

No activities to show.

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

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

Lease Management Properties Tenants

Property Sunrise Apartments

New Tenant

Information * = Required Information

Tenant Name: John Doe

Owner: Asma Ahmed,A

Phone: 555-123-4567

Email: johndoe@email.com

Activity

Filters: All time • All activities • All types

No activities to show.

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

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

Lease Management Properties Tenants

Tenant John Doe

Related Details

Tenant Name: John Doe

Owner: Asma Ahmed,A

Phone: 555-123-4567

Email: johndoe@email.com

Created By: Asma Ahmed,A - 9/14/2025, 3:27 AM

Last Modified By: Asma Ahmed,A - 9/14/2025, 3:27 AM

Activity

Filters: All time • All activities • All types

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.

https://orgfarm-30278b6d61-dev-ed.lightning.force.com/lightning/r/Tenant_c/a07gK00000DDN9mQAH/view

Lease Management Properties Tenants

App Launcher Q leaf

Owner Asma Ahmed,A.

Items Lease Agreements View All 555-123-4567 Email john doe@email.com Created By Asma Ahmed,A. 9/14/2025, 3:27 AM Last Modified By Asma Ahmed,A. 9/14/2025, 3:27 AM

Activity

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

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

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

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

Lease Management Properties Tenants Lease Agreements

Lease Agreements Recently Viewed

0 items • Updated a minute ago

New Import Change Owner Assign Label

Nothing to see here

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

Lease Management Properties Tenants Lease Agreements

New Lease Agreement

Information * = Required Information

Lease Agreement Name	Owner
Start Date 9/14/2025	Asma Ahamed.A
End Date 9/15/2026	
Monthly Rent \$1,200	
Property Sunrise Apartments	
Tenant John Doe	

[Cancel](#) [Save & New](#) [Save](#)

Lease Management Properties Tenants Lease Agreement L-0001

L-0001

Related Details

Lease Agreement Name L-0001	Owner Asma Ahamed.A
Start Date 9/14/2025	
End Date 9/15/2026	
Monthly Rent \$1,200	
Property Sunrise Apartments	
Tenant John Doe	

Created By
Asma Ahamed.A, 9/14/2025, 4:29 AM Last Modified By
Asma Ahamed.A, 9/14/2025, 4:29 AM

Lease Management Properties Tenants Tenant "achu" was created.

achu

Related Details

Tenant Name achu	Owner Asma Ahamed.A
Phone 123456789	
Email bscalds0113@gmail.com	
Created By Asma Ahamed.A, 9/14/2025, 4:34 AM	Last Modified By Asma Ahamed.A, 9/14/2025, 4:34 AM

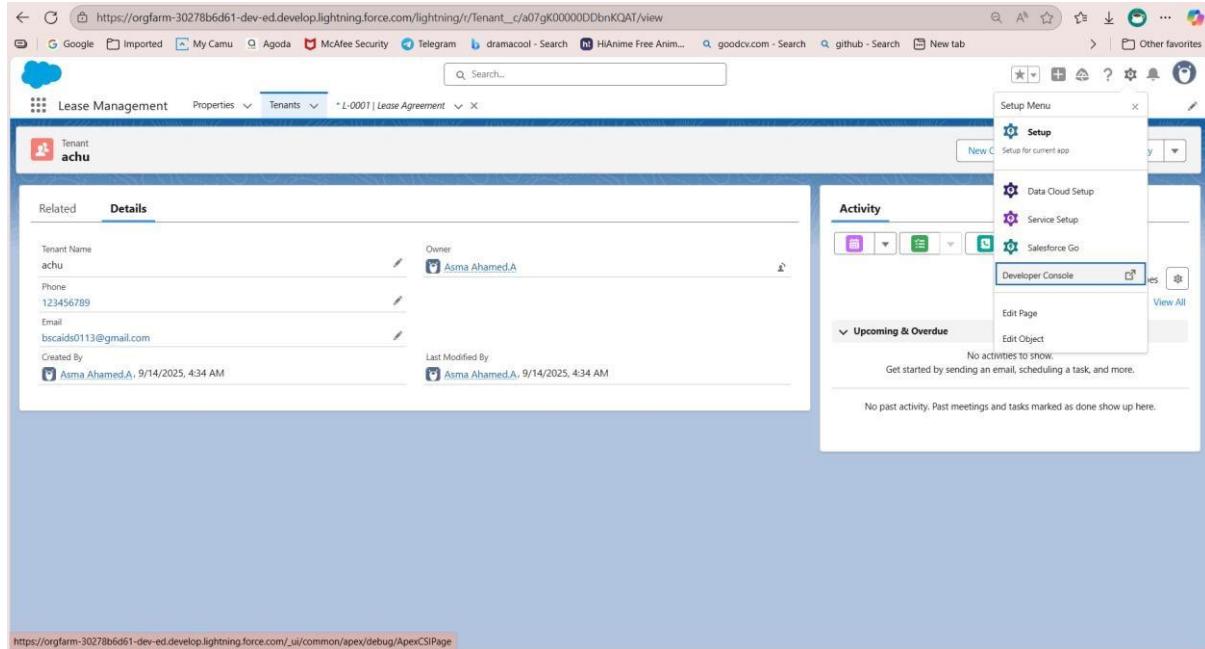
Activity

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

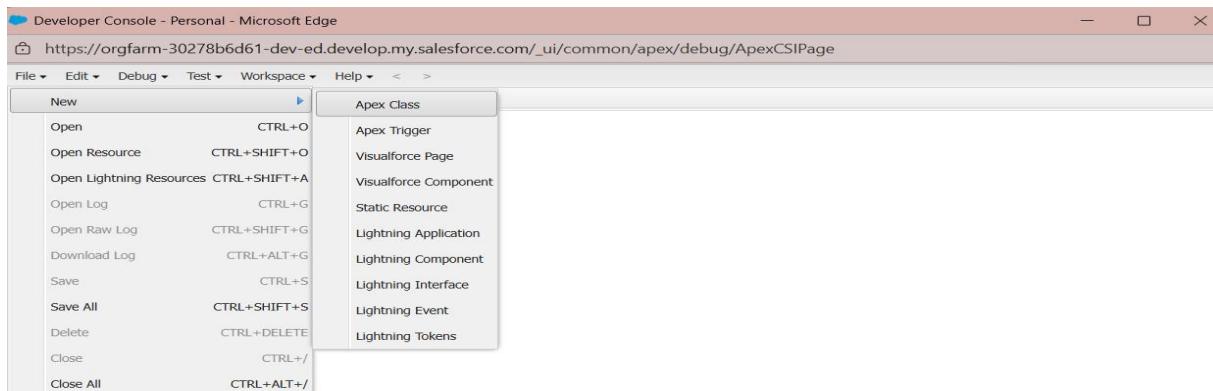
No past activity. Past meetings and tasks marked as done show up here.

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

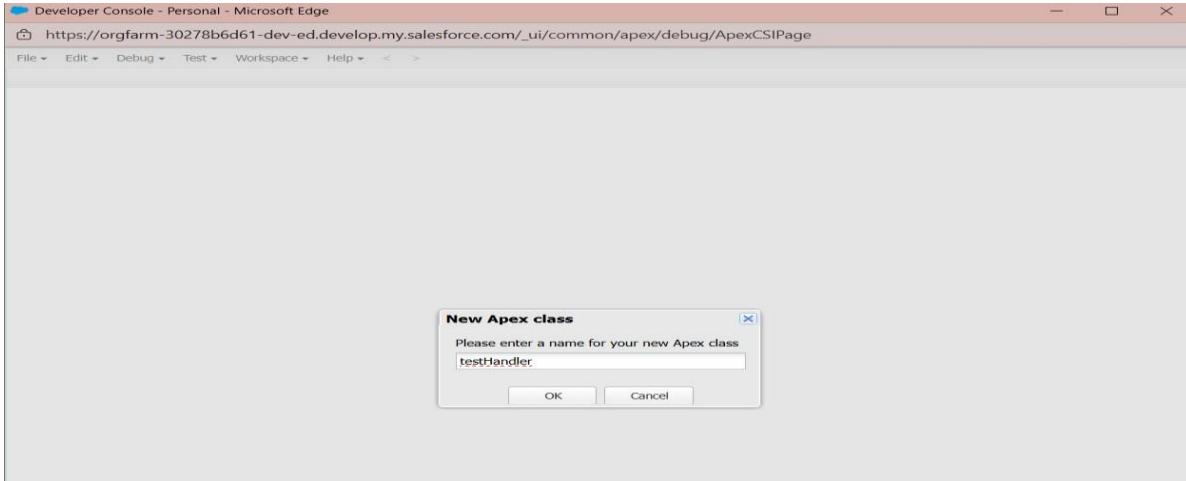
Create the Class (The Brain):



The screenshot shows the Salesforce Lightning Experience. A sidebar on the left displays a list of tenants, with 'achu' selected. The main content area shows the details for tenant 'achu', including its name, owner (Asma Ahmed.A), and last modified date. To the right, there is an 'Activity' feed with a section for 'Upcoming & Overdue' tasks.



The screenshot shows the Salesforce Developer Console interface. The 'File' menu is open, and the 'New' option is selected, revealing a dropdown menu. The 'Apex Class' option is highlighted, indicating it is the current choice for creating a new Apex class.



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

```

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

            newTenant.addError('A Property can only have one active Tenant. Please select a vacant
property.');

        }

    }

}

```

Save the code ctrl+S or file->save

If any error found means clear it and save it again

The screenshot shows the Salesforce Apex test editor interface. The title bar says "https://orgfarm-30278b6d61-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage". The tab bar has "testHandler.apxc" and "testHandler_Test.apxc" selected. The main area contains the following Apex code:

```

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

```

The code editor includes line numbers, syntax highlighting, and a status bar at the bottom.

@isTest public class testHandler_Test {

```

@isTest static void testPreventDuplicateTenants() {

// SETUP: Create a test property and an active tenant

```

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

insert testProperty;

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

insert existingTenant;

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

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

Test.startTest();

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

```
Test.stopTest();

}

@isTest static void testAllowValidTenant() {

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

    insert vacantProperty;

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

    Test.startTest();

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

    Test.stopTest();

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

}
```

Name it testHandler_Test

Copy and paste the entire code above

Save the file

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

Developer Console - Personal - Microsoft Edge

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

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

testHandler.apxc

Always Run Asynchronously

New Run

Rerun

Rerun Failed Tests

Run All

Abort

New Suite

Suite Manager

New Suite Run

Collapse All

Expand All

Clear Test Data

```
Code Coverage: None
32     }
33
34     @isTest
35     static void
36         idTenant() {
37             valid tenants (on a vacant property) can still be created.
38             operty = new Property__c(Name = 'Vacant Property');
39             y;
40
41             t = new Tenant__c(
42                 nant',
43                 cantProperty.Id,
44
45             Test.startTest();
46             Database.SaveResult result = Database.insert(validTenant, false);
47             Test.stopTest();
48
49             System.assert(result.isSuccess(), 'The valid tenant should have been inserted successfully');
50
51     }
52 }
```

Logs Tests Checkpoints Query Editor View State Progress Problems

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

testHandler.apxc testHandler_Test.apxc

Code Coverage: None API Version: 64

```

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

Select Tests

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

Add Selected Remove Selected

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

Logs Tests Checkpoints Query Editor View State Progress Problems

User Application Operation Time Status Read Size

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

File Edit Debug Test Workspace Help < >

testHandler.apxc testHandler_Test.apxc

Code Coverage: None API Version: 64

```

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

Running tests synchronously...

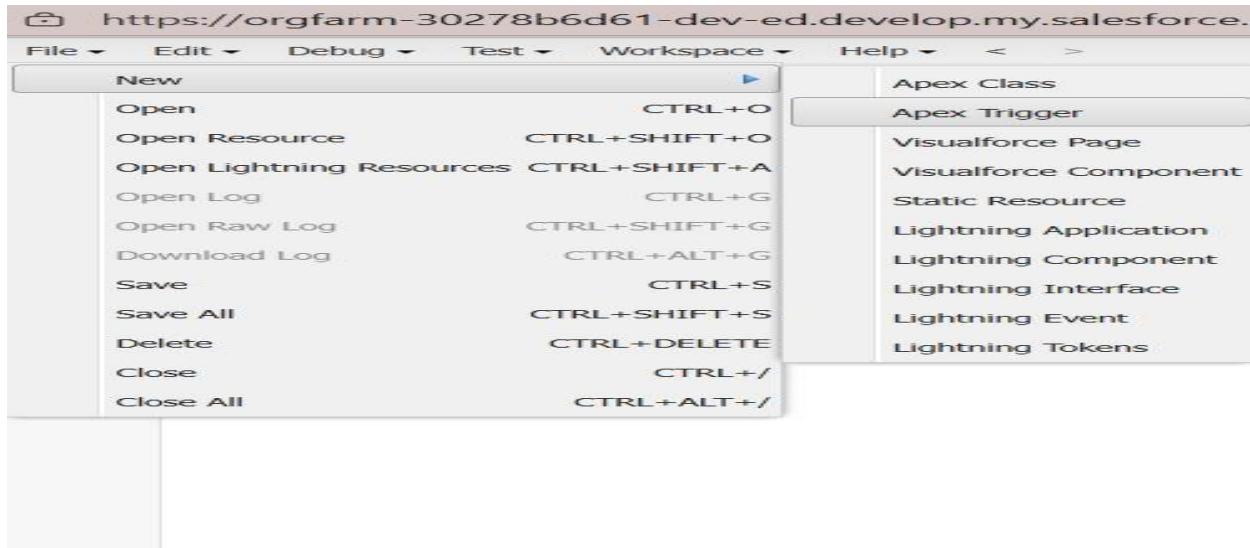
Success

Logs Tests Checkpoints Query Editor View State Progress Problems

User Application Operation Time Status Read Size

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

Create the Apex Trigger



Trigger: Name it TenantTrigger.

Select the Object: Choose Tenant__c from the dropdown.

A screenshot of the Salesforce Developer Console code editor. The title bar says 'Developer Console - Personal - Microsoft Edge' and the URL is 'https://orgfarm-30278b6d61-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage'. The file tab shows 'TenantTrigger.apxt *'. The code coverage is set to 'None' and the API version is '64'. The code in the editor is:

```
1 trigger TenantTrigger on Tenant__c (before insert, before update) {  
2     testHandler.preventDuplicateTenants(Trigger.new);  
3 }
```

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

We have successfully created and saved the trigger!

Leave request

SETUP New Custom Object

New Custom Object

Help for this Page

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

Custom Object Definition Edit [Save](#) [Save & New](#) [Cancel](#)

Custom Object Information * = Required Information

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

Label	Leave rejected	Example:	Account
Plural Label	Leave Requests	Example:	Accounts
Starts with vowel sound	<input type="checkbox"/>		

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

Object Name	Leave_rejected	Example:	Account
-------------	----------------	----------	---------

Description

Context-Sensitive Help Setting

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

Leave Request**Details**

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

Details

Description	<input type="text"/>
API Name	Leave_Request__c
Custom	<input checked="" type="checkbox"/>
Singular Label	Leave Request
Plural Label	Leave Requests
Enable Reports	<input type="checkbox"/>
Track Activities	<input type="checkbox"/>
Track Field History	<input type="checkbox"/>
Deployment Status	<input type="checkbox"/>
Deployed	<input checked="" type="checkbox"/>
Help Settings	<input type="checkbox"/>
Standard salesforce.com Help Window	<input type="checkbox"/>

[Edit](#)[Delete](#)

SETUP > OBJECT MANAGER
Leave Request

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

Leave Request
New Custom Field

Help for this Page ?

Step 2. Enter the details Step 2 of 4

[Previous](#) [Next](#) [Cancel](#)Field Label [i](#)

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

```
Pending
Approved
Rejected
```

 Display values alphabetically, not in the order entered Use first value as default value [i](#) Restrict picklist to the values defined in the value set [i](#)Field Name [i](#)SETUP > OBJECT MANAGER
Leave Request

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

Leave Request
New Custom Field

Help for this Page ?

Step 4. Add to page layouts Step 4 of 4

[Previous](#) [Save & New](#) [Save](#) [Cancel](#)

Field Label Status

Data Type Picklist

Field Name Status

Description

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

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

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

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

[Previous](#) [Save & New](#) [Save](#) [Cancel](#)

Leave Request

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scopina Rules

**Leave Request
New Custom Field**

Help for this Page

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

Description

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

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

Add Field **Page Layout Name**

Leave Request Layout

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

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

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

<input type="text"/> Quick Find	New	Deleted Fields	Field Dependencies	Set Hi
---------------------------------	---------------------	--------------------------------	------------------------------------	------------------------

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIE...	INDEX
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Leave Request Name	Name	Text(80)		✓
Owner	OwnerId	Lookup(User,Group)		✓
Status	Status__c	Picklist		

Leave Request

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

New Custom Field

Help for this Page

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

Description

Help Text

Required Always require a value in this field in order to save a recordAuto add Add this field to existing custom report types that contain this entity

Leave Request

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

Leave Request
New Custom Field
Help for this Page **Step 2. Enter the details****Step 2 of 4**[Previous](#) [Next](#) [Cancel](#)

Field Label	<input type="text" value="End Date"/> 
Field Name	<input type="text" value="End_Date"/> 
Description	<input type="text"/>
Help Text	<input type="text"/> 
Required	<input type="checkbox"/> Always require a value in this field in order to save a record
Auto add to custom	<input checked="" type="checkbox"/> Add this field to existing custom report types that contain this entity 

Leave Request

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

Leave Request
New Custom Field
Help for this Page **Step 4. Add to page layouts****Step 4 of 4**[Previous](#) [Save & New](#) [Save](#) [Cancel](#)

Field Label	End Date
Data Type	Date
Field Name	End_Date
Description	

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

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

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

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

[Previous](#) [Save & New](#) [Save](#) [Cancel](#)

Leave Request

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

**Leave Request
New Custom Field**

Help for this Page

Step 4. Add to page layouts**Step 4 of 4**[Previous](#) [Save & New](#) [Save](#) [Cancel](#)

Field Label Reason

Data Type Text Area

Field Name Reason

Description

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

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

Add Field
 Leave Request Layout

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

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

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

**Leave Request
New Relationship**

Help for this Page

Step 5. Add reference field to Page Layouts**Step 5 of 5**[Previous](#) [Save & New](#) [Save](#) [Cancel](#)

Field Label Requested By

Data Type Lookup

Field Name Requested_By

Description

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

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

Add Field
 Leave Request Layout

[Previous](#) [Save & New](#) [Save](#) [Cancel](#)

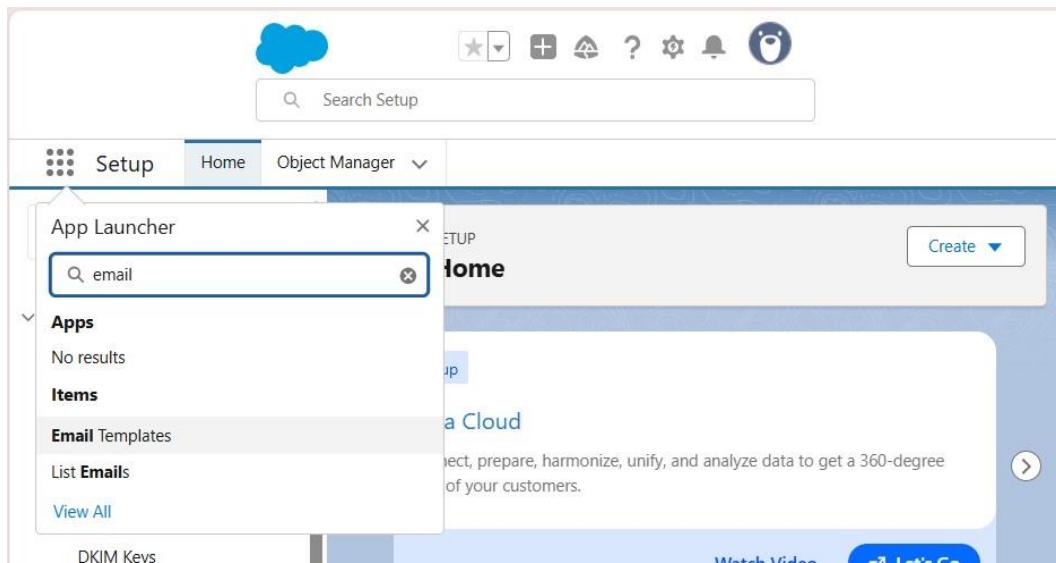
Leave Request

Details

Fields & Relationships

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

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



The screenshot shows the Salesforce Setup Home page. At the top, there's a navigation bar with icons for Cloud, Favorites, New, Deleted Fields, Field Dependencies, and Set Home. Below it is a search bar with the placeholder "Search Setup". The main area has tabs for "Setup", "Home", and "Object Manager". On the left, the App Launcher is open, showing a search bar with "email" typed in. Under "Items", there are sections for "Email Templates" (with "List Emails" and "View All" options), "DKIM Keys", and a "Watch Video" button. A tooltip for "Email" is visible, pointing to the "Email" section in the App Launcher.

EMAIL TEMPLATE

The screenshot shows the 'Lease Management' software interface. At the top, there is a navigation bar with links to Google, Imported, My Camu, Agoda, McAfee Security, Telegram, and Other favorites. Below the navigation bar is a search bar with a magnifying glass icon and a placeholder 'Search...'. The main area has a blue header bar with icons for star, plus, settings, and a user profile. The title bar says 'Lease Management Properties Tenants * Email Templates'. A sub-header 'Email Templates All Templates' is visible. On the right, there is a button for 'New Email Template' and other controls. The main content area is a table with columns: Email Template ..., Description, Email Template..., Last Modified ..., and Last Modified There are no items listed in the table.

This screenshot shows the 'New Email Template' dialog box overlaid on the main Lease Management interface. The dialog has a tab labeled 'Information' where 'Email Template Name' is set to 'Leave Request Approval Needed' and 'Related Entity Type' is set to 'None'. Under 'Message Content', the 'Subject' field contains 'Leave Request Approval for {Leave_Request__c} Requests'. The 'HTML Value' section contains the following text:

```
Dear Manager,  
{!Leave_Request__c.Requested_By__c} has submitted a leave request from  
{!Leave_Request__c.Start_Date__c} to {!Leave_Request__c.End_Date__c}.
```

This screenshot shows the details page for the 'Leave Request Approval' email template. The 'Details' tab is selected. In the 'Information' section, the 'Email Template Name' is 'Leave Request Approval', 'Description' is 'Process to approve employee leave requests', and 'Related Entity Type' is 'None'. The 'Message Content' section includes the subject 'Leave Request Approval for {Leave_Request__c} Requests' and the HTML value:

```
Dear Manager,  
<br><br>  
{!RequestedBy} has submitted a leave request from {!StartDate} to {!EndDate}<br><br>  
Reason: {!Reason}<br><br>  
Please review and approve.
```

The 'Additional Information' section shows 'Created By' as Asma Ahmed.A, dated 9/14/2025, 10:02 AM, and 'Last Modified By' as Asma Ahmed.A, dated 9/14/2025, 10:02 AM.

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

Lease Management Properties Tenants Leave Rejected X

Email Templates All Templates

3 items • Refresh this list to view the latest data

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

New Email Template

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

Home

Create ▾

Setup

Data Cloud

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

Watch Video

Let's Go



Most Recently Used

Data

Mass Transfer Approval Requests

Feature Settings

Approval Settings

Process Automation

Approval Processes

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

New Approval Process
Identity Resolutions

Help for this Page ?

Step 1. Enter Name and Description

Step 1 of 6

Next Cancel

Enter a name and description for your new approval process.

Enter Name and Description

! = Required Information

Process Name

Leave Request Approval

Unique Name

Leave_Request_Approval

Description

Process to approve or reject employee leave requests

Next Cancel

Step 3. Specify Approver Field and Record Editability Properties

Step 3 of 6

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

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

Select Field Used for Automated Approval Routing

Next Automated Approver Determined By

--None--

--None--

Standard User Fields

Manager

Custom User Fields

Create New Hierarchical Relationship Field

Data

Mass Transfer [Approval Requests](#)

Feature Settings

[Approval Settings](#)

Process Automation

[Approval Processes](#)

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

New Approval Process Identity Resolutions

[Help for this Page](#)

Step 4. Select Notification Templates

Step 4 of 6

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

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

Email Template

Approval Assignment Email Template

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

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

Specify Entry Criteria

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

Field

--None--	--None--

Operator

[Add Filter Logic...](#)

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

OUTPUT:

The screenshot shows the Salesforce Setup Home page. On the left, there's a sidebar with links like Setup Home, Service Setup Assistant, and Sales Cloud Everywhere. The main area has four cards: Data Cloud, Get Started with Einstein Bots, Mobile Publisher, and Join the Trailblazer Community. Below these is a section titled "Most Recently Used" showing a list of Apex triggers and classes.

NAME	TYPE	OBJECT
TenantTrigger	Apex Trigger	Tenant
Asma Ahmed.A	User	
testHandler_Test	Apex Class	
Sfdc_DevConsole	Debug Level	
testHandler	Apex Class	

The screenshot shows the Salesforce Lease Management page. It displays a list of recently viewed tenants: achu and John Doe. There are buttons for New, Import, Change Owner, and Assign Label at the top right.

New Tenant

* = Required Information

Information

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

Buttons: Cancel, Save & New, Save

https://orgidanti-50276.dodoo.io/dev-ed.develop.lightning... ...

Google Imported My Camu Agoda McAfee Security Telegram Other favorites

Lease Management Properties Tenants

Tenants
Recently Viewed ▾ New Import Change Owner Assign Label

3 items • Updated 9 minutes ago

	<input type="checkbox"/> Tenant Name	
1	<input type="checkbox"/> Arish	▼
2	<input type="checkbox"/> achu	▼
3	<input type="checkbox"/> John Doe	▼

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

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

New Tenant

* = Required Information

Information

Tenant Name: Test Duplicate

Owner: Asma Ahamed.A

Property: Sunrise Apartments

Active:

Cancel Save & New Save

New Tenant

* = Required Information

Information

* Tenant Name

Test Duplicate

Owner

Asma Ahamed.A

Phone

Email

Property

∅ We hit a snag.

Review the errors on this page.

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



Cancel

Save & New

Save

2. ADVANTAGES & BENEFITS

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

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

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

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

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

2.1 CHALLENGES & CONSIDERATIONS

Initial Setup Complexity: Requires custom object creation and Apex development

Training Requirements: Staff needs training for Salesforce interface and processes

Ongoing Maintenance: Regular updates needed for changing business rules

Integration Needs: May require additional integration with accounting systems

Cost Considerations: Salesforce licensing and potential development costs

3. CONCLUSION

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

