SB8067 Salesforce Developer

S.Veerasamy Chettiar College of Engineering And Technology,Puliyangudi.

Tittle : LEASE MANAGEMENT

Submitted by,
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Smart Internz

Dear Student,

Greetings from SmartBridge,

Your team has successfully enrolled for the project. Please find the team details below

Team ID : NM2025TMID04732

Team Size : 4

Team Leader : Mathialagan R

Team member : Mohamed Sithick M

Team member : Mohamed hameem S

Team member : Sanjai S

Regards,
Team SmartBridge

LEASE MANAGEMENT

1. Ideation Phase

Management System is designed to simplify and automate the daily operations of a garage using Salesforce CRM.

Traditional garages depend on manual record-keeping for customer details, appointments, and billing, which leads to inefficiency and errors.The idea behind this project is to use Salesforce's cloud-based capabilities to:

- **Schedule and track service appointments.**
- **Automate billing and feedback collection.**
- **Maintain transparency between garage owners, staff, and customers.**

This phase focuses on identifying challenges such as delayed service tracking, missing customer data, and billing confusion — and proposing Salesforce automation as the solution.

1.Salesforce Developer Signup Page

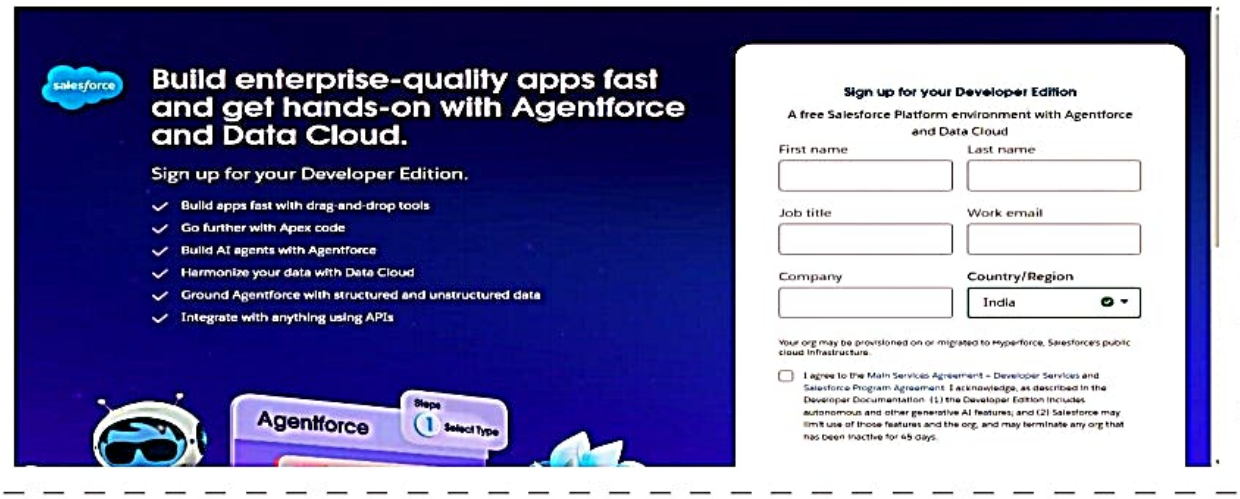


Figure 1.1: Salesforce Developer Org Signup Page

2.Salesforce Setup Home Page

2. Project Planning Phase

Lease Management in Salesforce is a customized solution designed to help organizations track, manage, and optimize real estate leases — whether for commercial, residential, or equipment leasing. By integrating lease operations into Salesforce, businesses can centralize tenant data, automate workflows.

modules planned:

1.Streamline lease creation, approval, and renewal processes.

2.Maintain a single source of truth for lease and tenant information.

3.Automate rent invoicing and payment tracking.

4.Improve visibility into lease expirations and revenue forecasting.

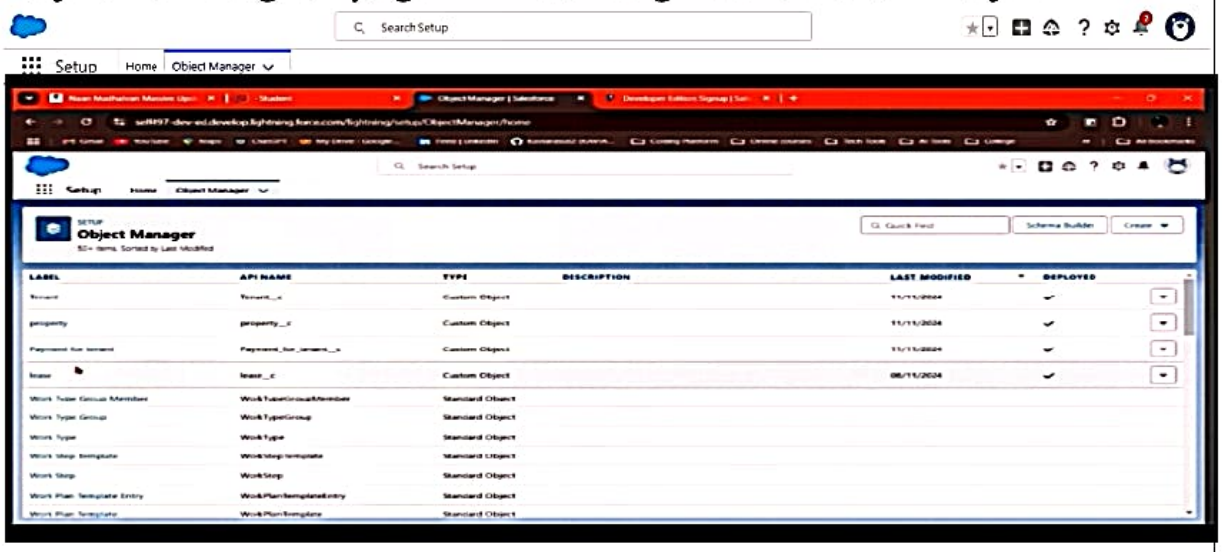
- Salesperson: Limited access to assigned records.

A structured timeline was followed:

1. Object creation and setup
2. Tab and Lightning app configuration
3. Profile & Role Hierarchy setup
4. Sharing settings and automation flows 5

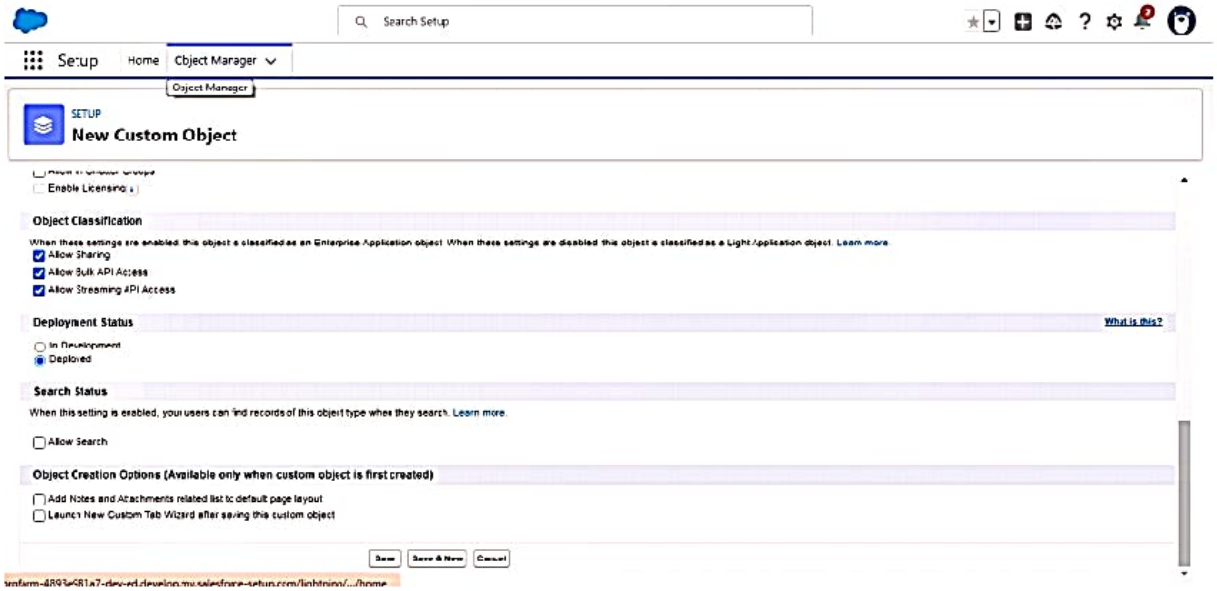
. Testing and deployment

1. Object Manager page – showing all custom objects.



Object Manager – Creating Custom Objects

2. List of all custom objects created.



3. Project Design Phase

The Project Design Phase is a crucial stage in developing the Lease Management System in Salesforce. It focuses on creating a blueprint of how the solution will function, look, and integrate within the Salesforce environment. This phase ensures that all system requirements are translated into a scalable, efficient, and user-friendly design.

1. System Architecture Design

Defines how different Salesforce components (Objects, Apex Classes, Lightning Web Components, Flows) interact.

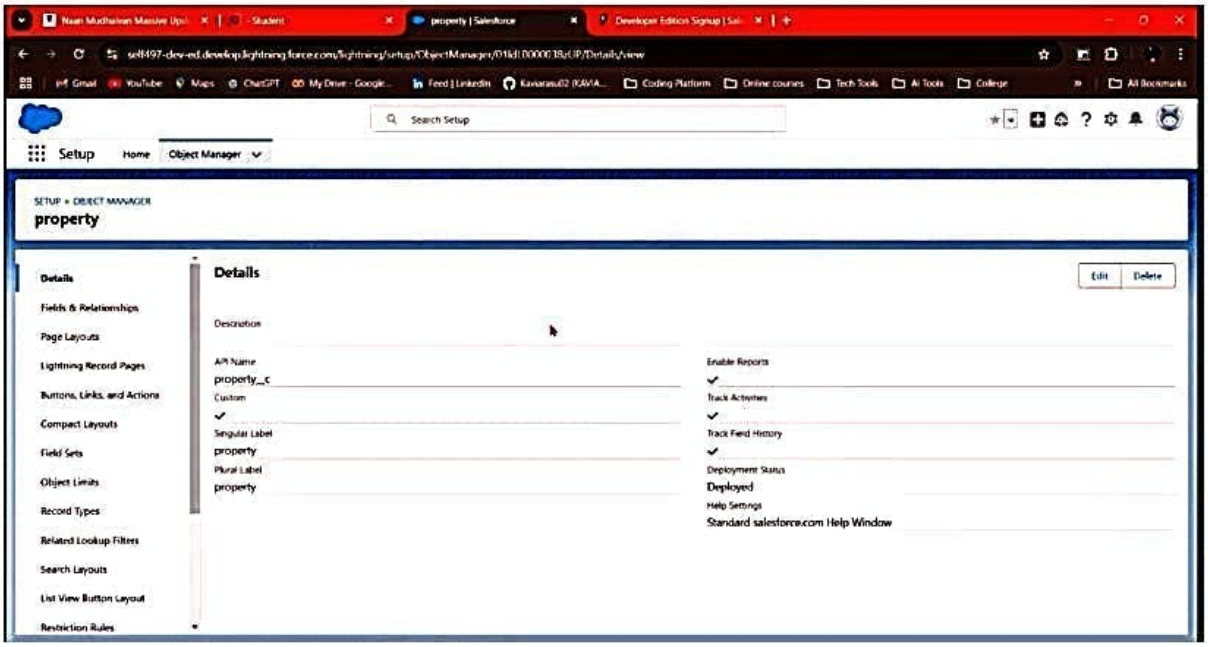
2. User Interface (UI) & User Experience (UX) Design

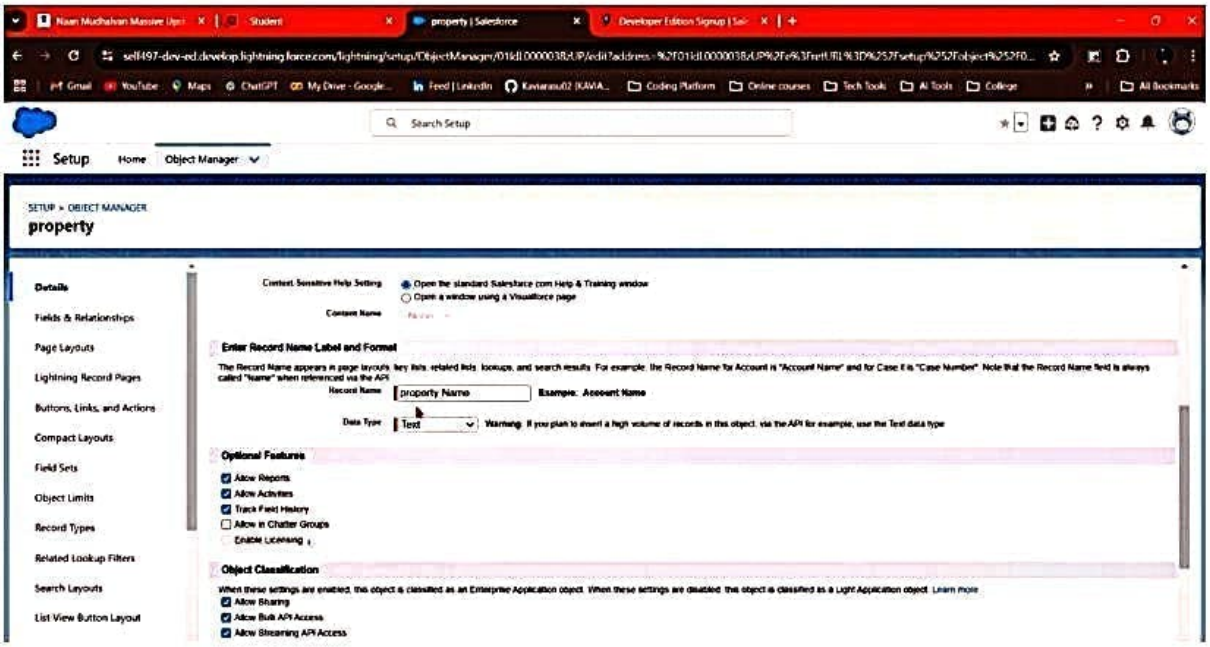
Designs intuitive Lightning pages and custom components for easy navigation.

3. Data Model & Schema Design

Defines how lease-related data will be structured and stored in Salesforce.

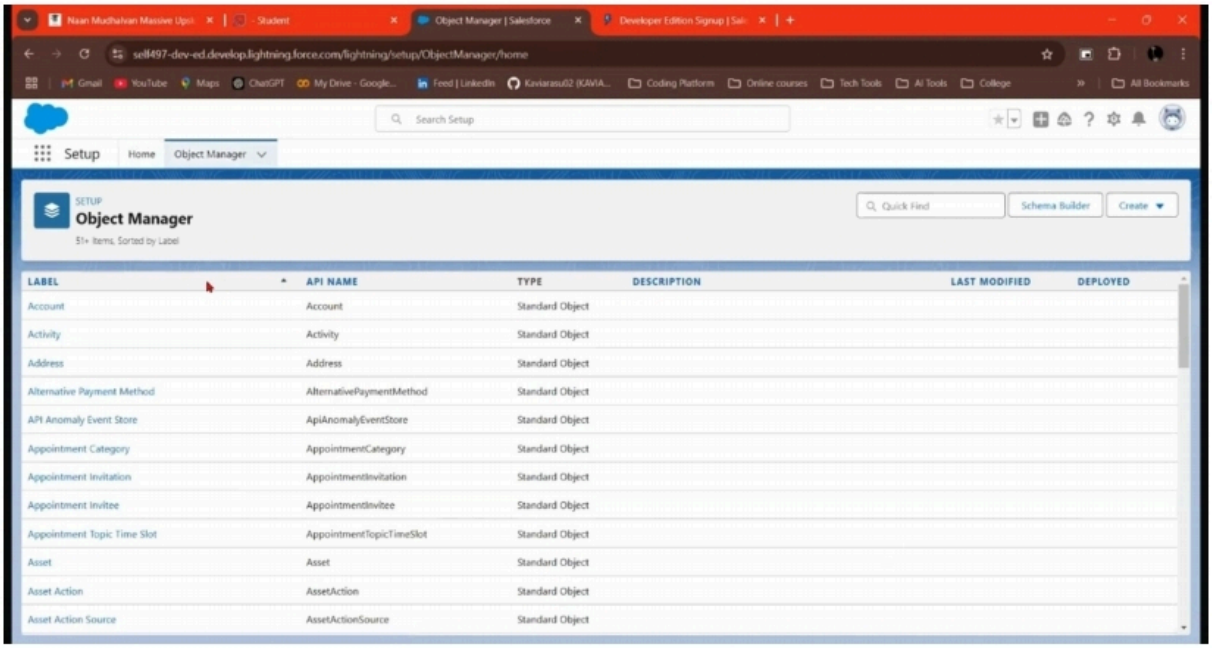
1. **Field creation (e.g., Gmail, Phone, Lookup).**

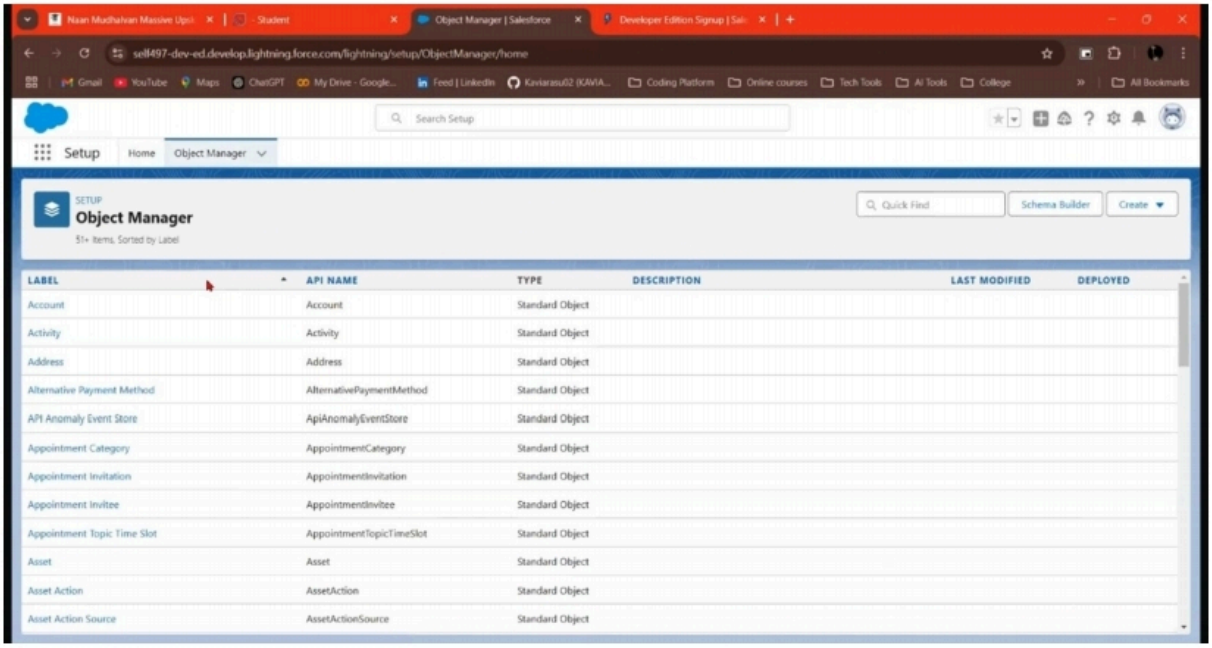




Custom Field Creation in Customer Details Object

2. Lightning App setup showing all tabs.





Garage Management Lightning App Setup

4. Requirement Analysis

In this phase, both functional and non-functional requirements of the system are clearly defined.

Functional Requirements:

1. Add, view, and manage Customer, Appointment, and Billing records.
2. Automate updates — for example, when payment is completed, mark status as “Paid.”
3. Send email alerts automatically upon successful billing.
4. Allow users to generate reports and dashboards for performance tracking.

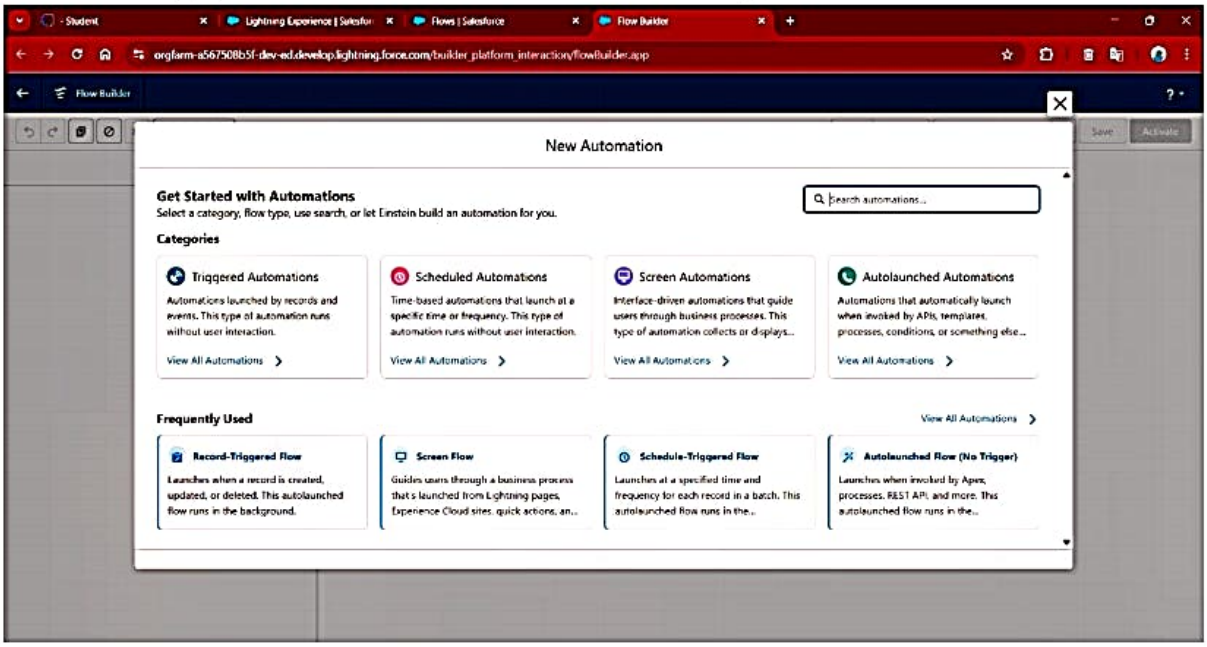
Non-Functional Requirements:

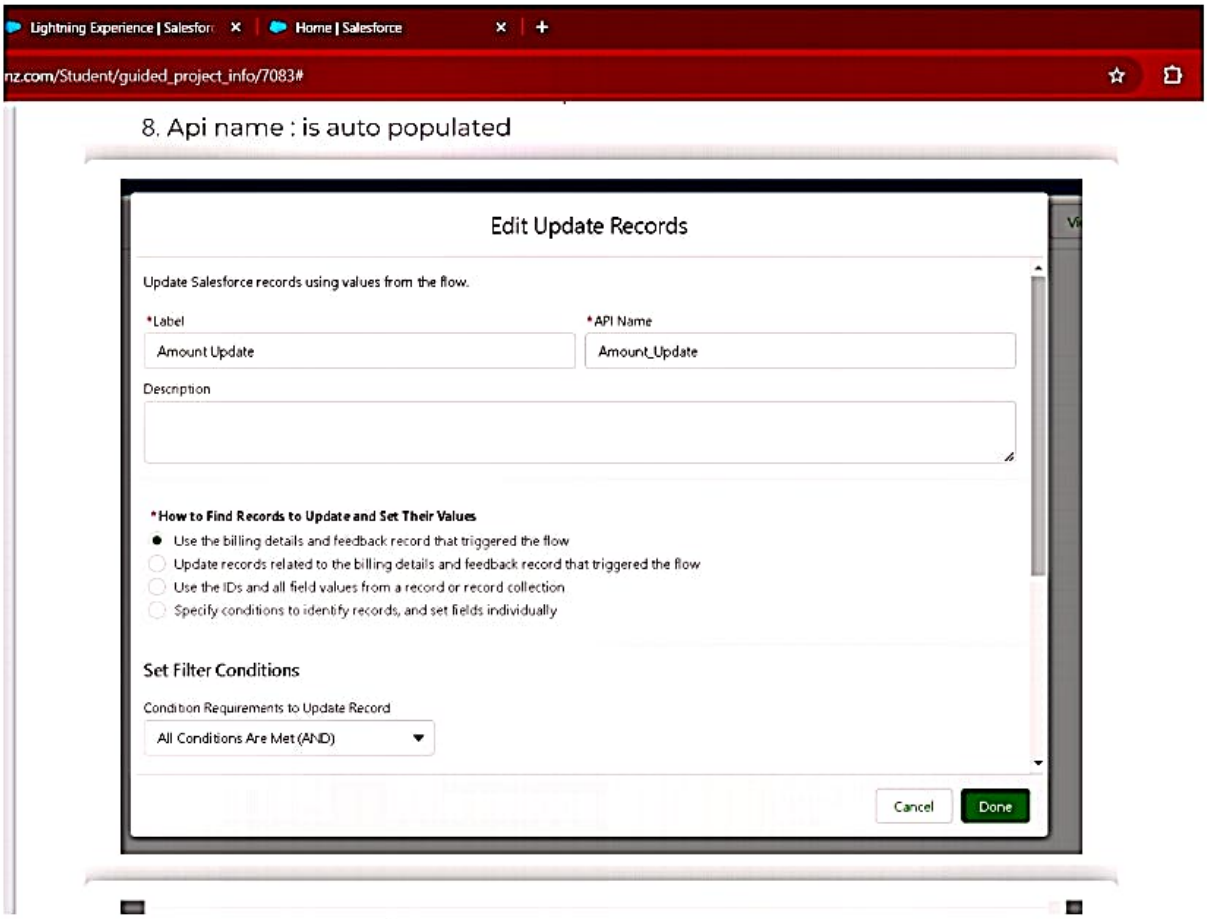
1. The system should be user-friendly with a simple interface.
2. Data should be secured based on role-based access.
3. Performance should be optimized for fast operations.
4. Validation and duplicate prevention to ensure accuracy.

Implementation Tools:

- Salesforce Objects, Flows, Apex Trigger, Validation & Duplicate Rules.
- Reports and Dashboards for analysis.

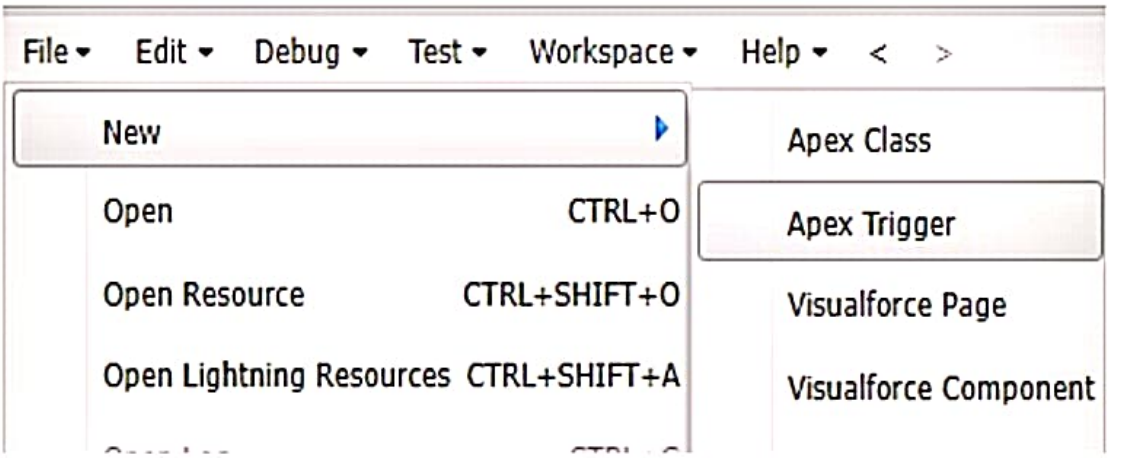
1. Record-triggered flow showing automation.

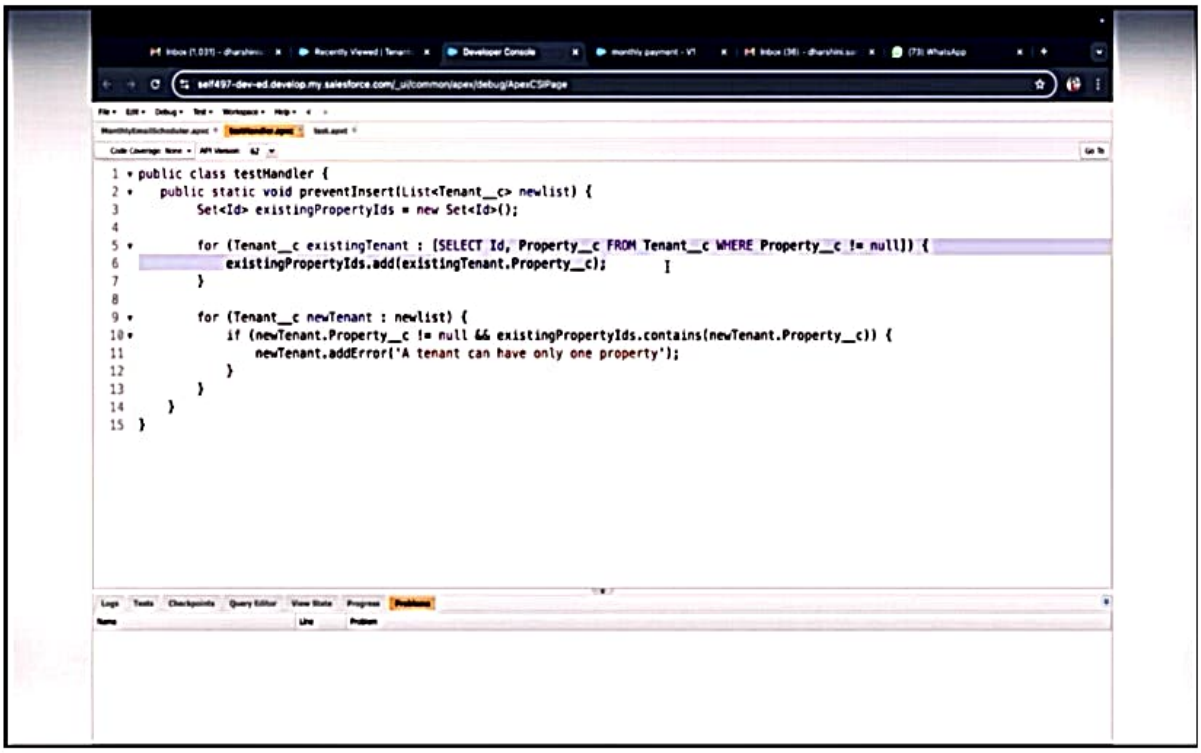




Record-Triggered Amount Update

2.Apex Trigger window in Developer Console.





```
public class testHandler {
    public static void preventInsert(List<Tenant__c> newlist) {
        Set<Id> existingPropertyIds = new Set<Id>();

        for (Tenant__c existingTenant : [SELECT Id, Property__c FROM Tenant__c WHERE Property__c != null]) {
            existingPropertyIds.add(existingTenant.Property__c);
        }

        for (Tenant__c newTenant : newlist) {
            if (newTenant.Property__c != null && existingPropertyIds.contains(newTenant.Property__c)) {
                newTenant.addError('A tenant can have only one property');
            }
        }
    }
}
```

Apex Trigger for Amount Distribution

5. Performance Testing

After implementation, the system uderwent multipleests Performed: Performance testing is the process of evaluating the speed, responsiveness , stability, and scalability of the Lease Management application built on Salesforce. It ensures that the system performs efficiently under expected user load and data volume, especially when handling multiple leases, payments, and contract updates simultaneously.

1. Objectives of Performance Testing

Validate System Efficiency: Ensure that lease operations (such as creating, updating, or renewing leases) run smoothly without delays

.2. Key Areas Tested

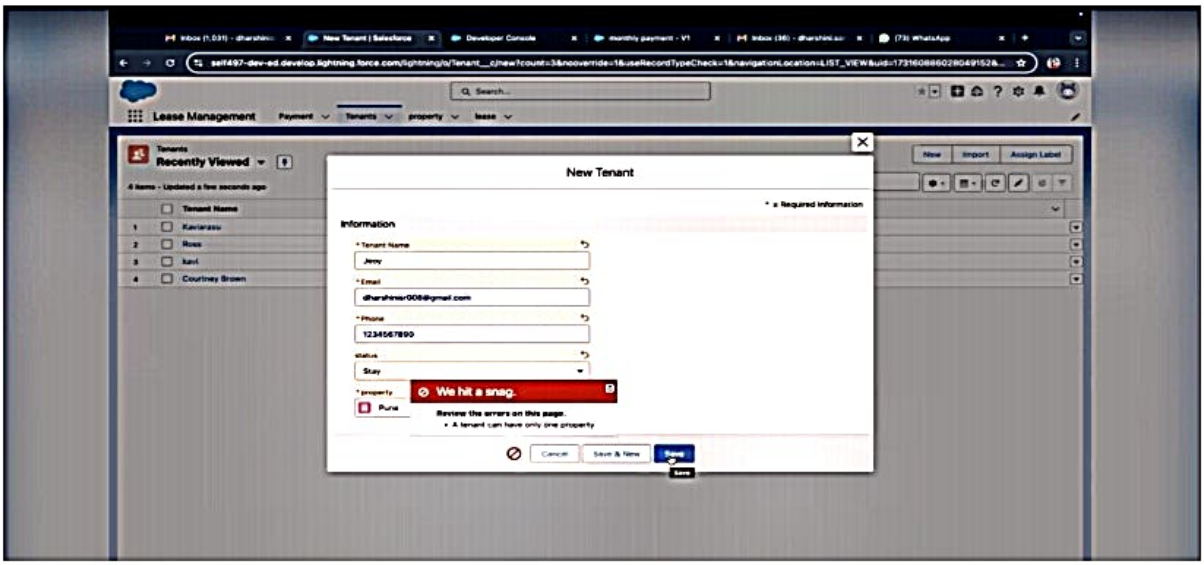
Lease Record Operations: Create, edit, delete, and search lease records.

Data Volume Testing: Handling large datasets (thousands of lease agreements).

1. Created Status records for all objects.

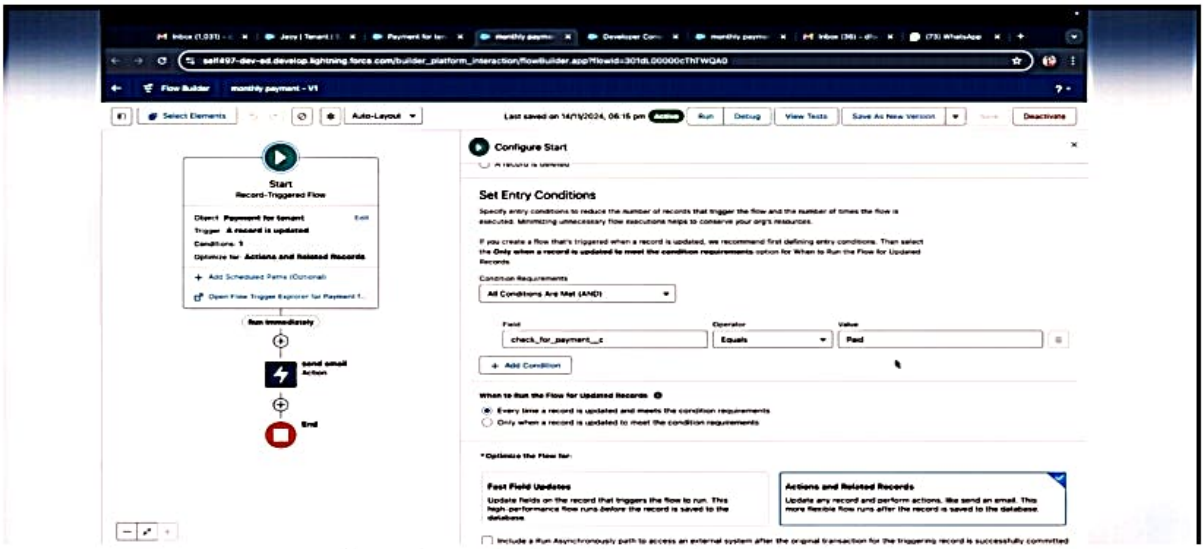
6. Now automatically Service status will be moved to completed.

2.Report tab showing generated report.



Service Information Report

3.Dashboard line chart view.



Service Rating Dashboard

Conclusion:

The Lease Management System built on Salesforce provides an efficient, transparent, and scalable solution for managing lease agreements, tenants, payments, and property details in one centralized platform. By leveraging Salesforce's powerful automation tools, custom objects, and analytics, the system enhances operational efficiency, reduces manual errors, and ensures better decision-making. align with business needs, user convenience, and Salesforce best practices. The final outcome demonstrates how Salesforce can transform traditional lease management into a smart, data-driven process with real-time insights, automated workflows, and seamless collaboration between teams.