



## SB8067 Salesforce Developer



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

Title : LEASE MANAGEMENT

Submitted by,  
R. Mathialagan,  
952622104031



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

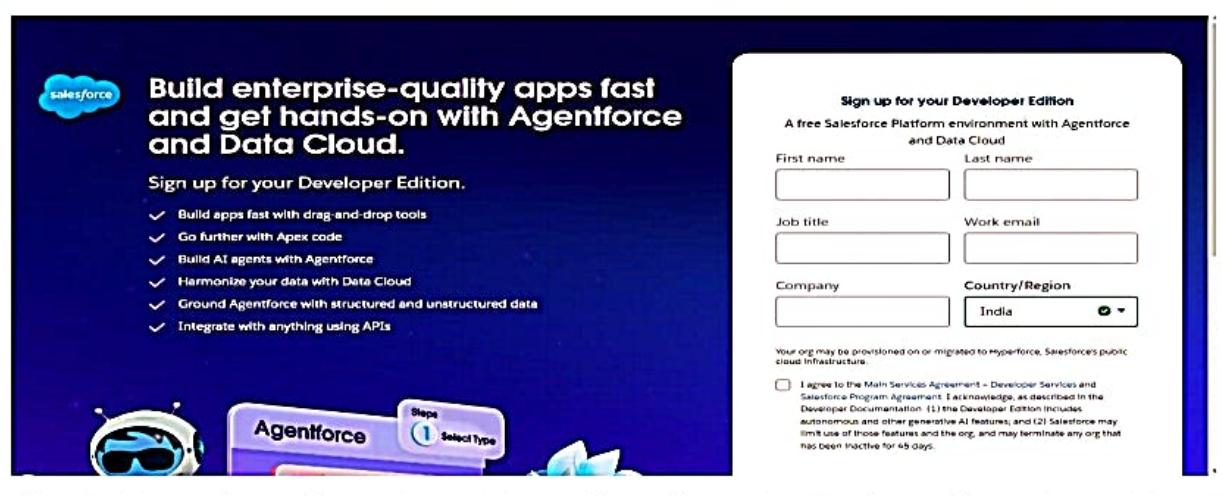
Management System is designed to simplify and automate the daily operations of a garage using Salesforce CRM.

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



The screenshot shows the "Sign up for your Developer Edition" page. The header features the Salesforce logo and the text: "Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud." Below this, a list of benefits includes: "Build apps fast with drag-and-drop tools", "Go further with Apex code", "Build AI agents with Agentforce", "Harmonize your data with Data Cloud", "Ground Agentforce with structured and unstructured data", and "Integrate with anything using APIs". A "Select Type" button is visible at the bottom. The main form area is titled "Sign up for your Developer Edition" and describes it as "A free Salesforce Platform environment with Agentforce and Data Cloud". It contains fields for "First name", "Last name", "Job title", "Work email", "Company", "Country/Region" (set to India), and a dropdown for "Region". A note states: "Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud infrastructure." At the bottom, there is a checkbox for agreeing to the "Main Services Agreement - Developer Services and Salesforce Program Agreement" and a link to "Developer Documentation". A note specifies: "(1) the Developer Edition includes autonomous and other generative AI features; and (2) Salesforce may limit use of those features and the org, and may terminate any org that has been inactive for 45 days."

**Figure 1.1: Salesforce Developer Org Signup Page**

**2.Salesforce Setup Home Page**



Hi

Thanks for signing up for a Developer Edition. Now you can start building on Salesforce for free and get hands-on with Agentforce and Data Cloud.

There's just one more step. Use the following link to reset the password for your Developer Edition. This link expires in 24 hours.

**Reset Password**

To easily log in later, save this URL:

<https://orgfarm-4893e981a7-dev-ed.develop.my.salesforce.com>

## **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**
- . Testing and deployment**

## 1. Object Manager page – showing all custom objects.

The screenshot shows the Salesforce Object Manager page. At the top, there's a search bar labeled "Search Setup". Below it, a navigation bar has "Object Manager" selected. The main area displays a table titled "Object Manager" with 50+ items sorted by Last Modified. The columns are: Label, API Name, Type, Description, Last Modified, and Deployed. The table lists various custom objects like "tenant\_c", "property\_c", and "lease\_c", along with standard objects like "WorkTypeGroupMember", "WorkTypeGroup", "WorkType", etc. The "Deployed" column shows checkboxes, many of which are checked.

Label	API Name	Type	Description	Last Modified	Deployed
tenant	Tenant_c	Custom Object		11/11/2024	<input checked="" type="checkbox"/>
property	Property_c	Custom Object		11/11/2024	<input checked="" type="checkbox"/>
Payment for tenant	Payment_for_tenant_c	Custom Object		11/11/2024	<input checked="" type="checkbox"/>
lease	Lease_c	Custom Object		08/11/2024	<input checked="" type="checkbox"/>
Work Type Group Member	WorkTypeGroupMember	Standard Object			
Work Type Group	WorkTypeGroup	Standard Object			
Work Type	WorkType	Standard Object			
Work Step Attribute	WorkStepAttribute	Standard Object			
Work Step	WorkStep	Standard Object			
Work Plan Template Entry	WorkPlanTemplateEntry	Standard Object			
Work Plan Template	WorkPlanTemplate	Standard Object			

## Object Manager – Creating Custom Objects

## 2. List of all custom objects created.

The screenshot shows the "New Custom Object" creation page. At the top, there's a search bar labeled "Search Setup". Below it, a navigation bar has "Object Manager" selected. The main area has a title "New Custom Object". It includes sections for "Object Classification" (with checkboxes for "Allow Sharing", "Allow Sub API Access", and "Allow Streaming API Access"), "Deployment Status" (with "Deployed" selected), "Search Status" (with "Allow Search" unchecked), and "Object Creation Options" (with checkboxes for "Add Notes and Attachments related list to default page layout" and "Launch New Custom Tab Wizard after saving this custom object"). At the bottom, there are "Save", "Save & New", and "Cancel" buttons.

### **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.**

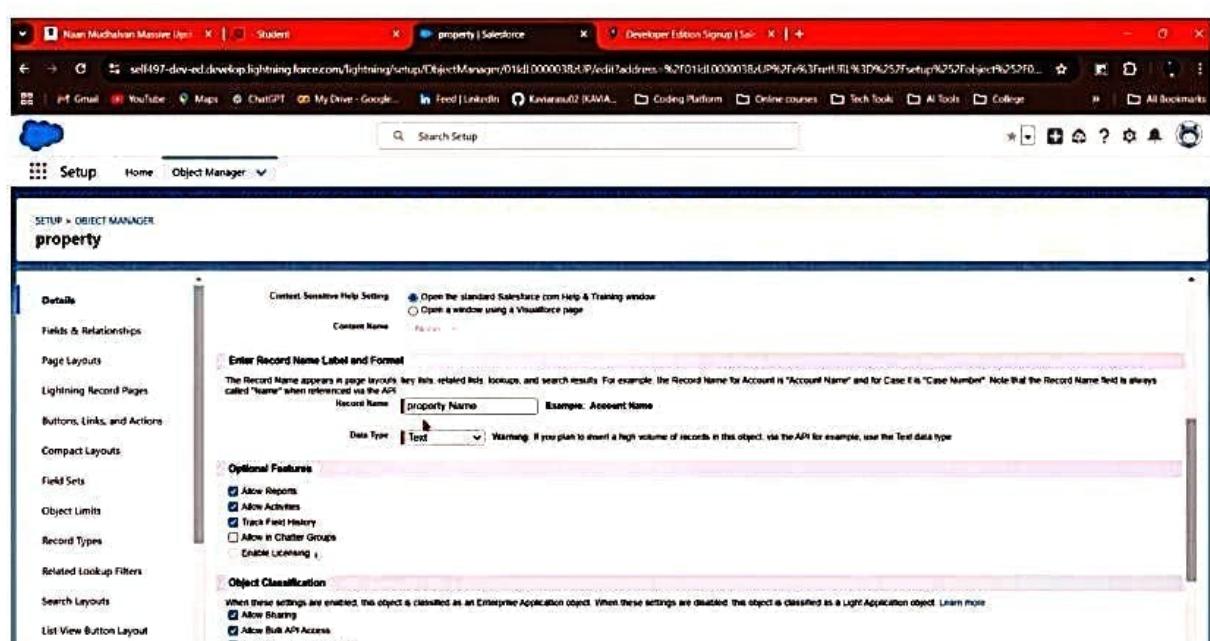
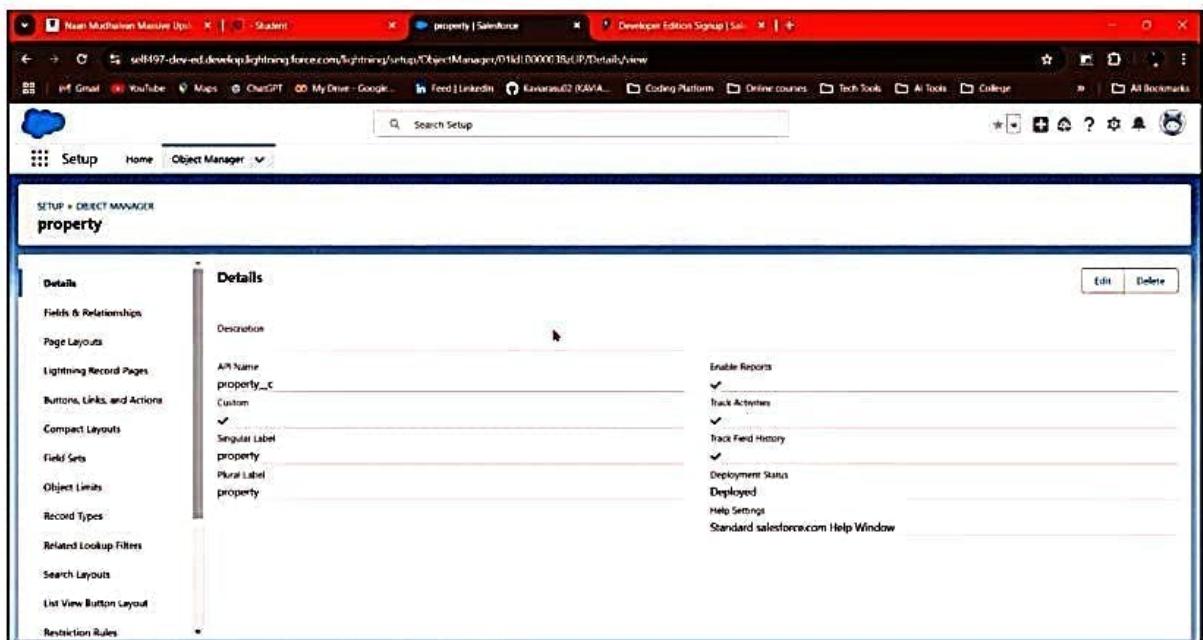
#### **2. User Interface (UI) & User Experience (UX) Design**

**Designs intuitive Lightning pages and custom components for easy navigation.**

#### **3. Data Model & Schema Design**

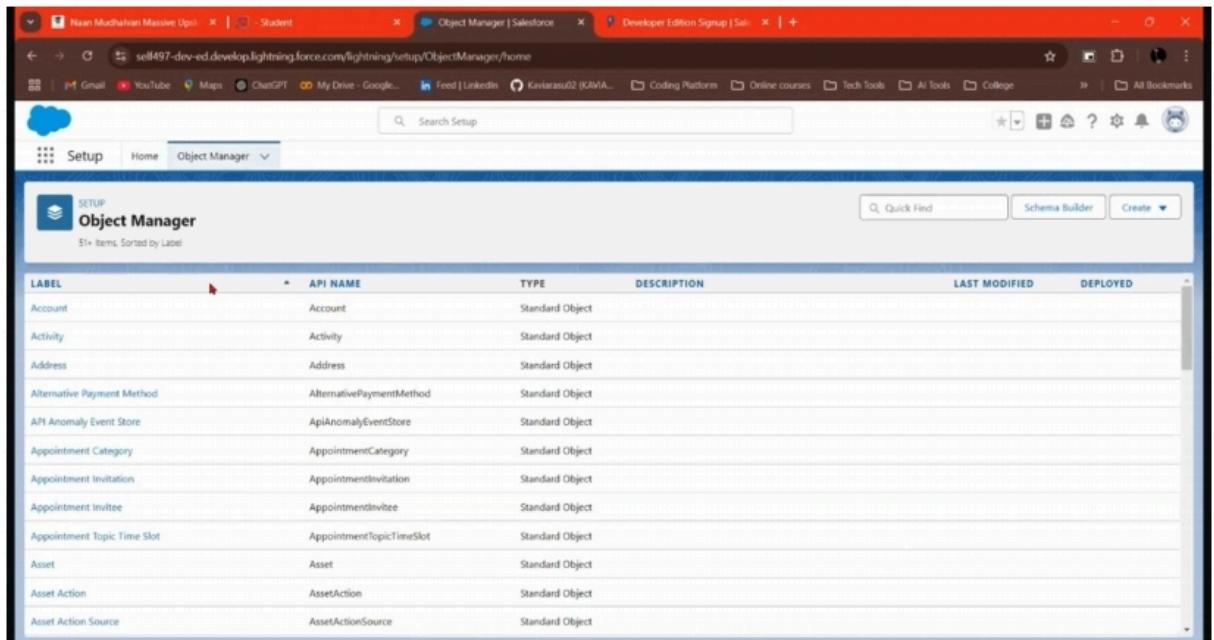
**Defines how lease-related data will be structured and stored in Salesforce.**

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



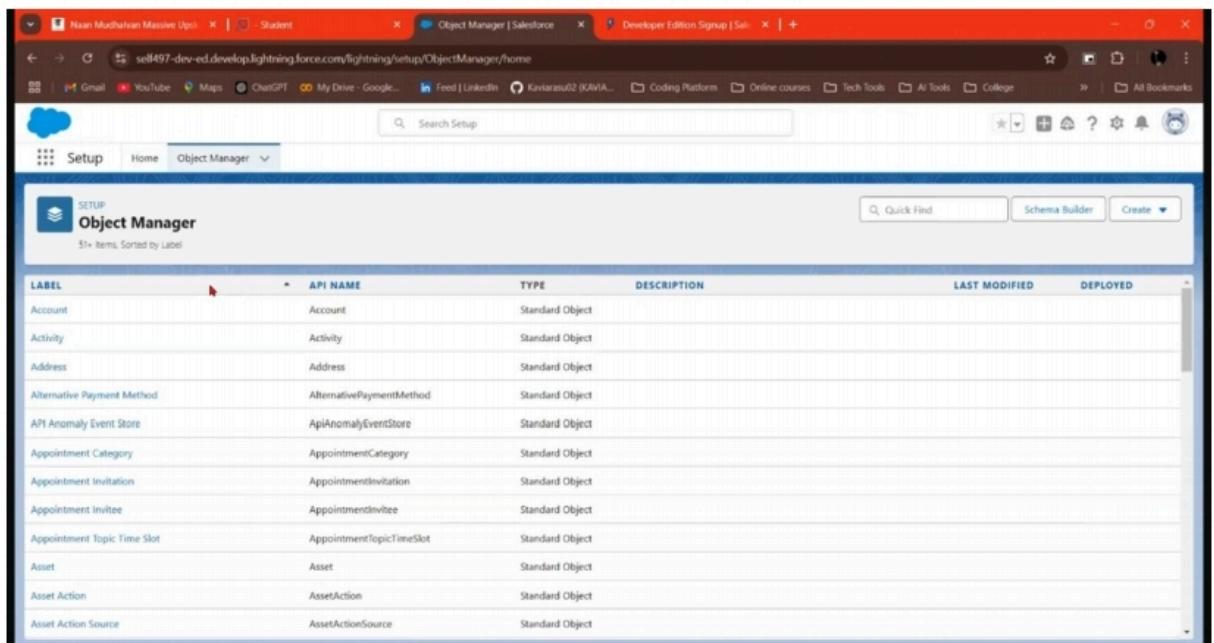
Custom Field Creation in Customer Details Object

## 2. Lightning App setup showing all tabs.



The screenshot shows the Salesforce Object Manager interface. The page title is "Object Manager | Salesforce". The main content area displays a table titled "Object Manager" with 51+ items, sorted by Label. The columns are labeled: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The table lists various standard objects such as Account, Activity, Address, Alternative Payment Method, API Anomaly Event Store, Appointment Category, Appointment Invitation, Appointment Invitee, Appointment Topic Time Slot, Asset, Asset Action, and Asset Action Source. All objects are categorized as Standard Objects.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Account	Standard Object			
Activity	Activity	Standard Object			
Address	Address	Standard Object			
Alternative Payment Method	AlternativePaymentMethod	Standard Object			
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object			
Appointment Category	AppointmentCategory	Standard Object			
Appointment Invitation	AppointmentInvitation	Standard Object			
Appointment Invitee	AppointmentInvitee	Standard Object			
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object			
Asset	Asset	Standard Object			
Asset Action	AssetAction	Standard Object			
Asset Action Source	AssetActionSource	Standard Object			



This screenshot is identical to the one above, showing the Salesforce Object Manager interface with the same list of objects and table structure. It displays 51+ items, sorted by Label, with columns for LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The objects listed are standard Salesforce objects like Account, Activity, Address, etc.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Account	Standard Object			
Activity	Activity	Standard Object			
Address	Address	Standard Object			
Alternative Payment Method	AlternativePaymentMethod	Standard Object			
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object			
Appointment Category	AppointmentCategory	Standard Object			
Appointment Invitation	AppointmentInvitation	Standard Object			
Appointment Invitee	AppointmentInvitee	Standard Object			
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object			
Asset	Asset	Standard Object			
Asset Action	AssetAction	Standard Object			
Asset Action Source	AssetActionSource	Standard Object			

## 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.**

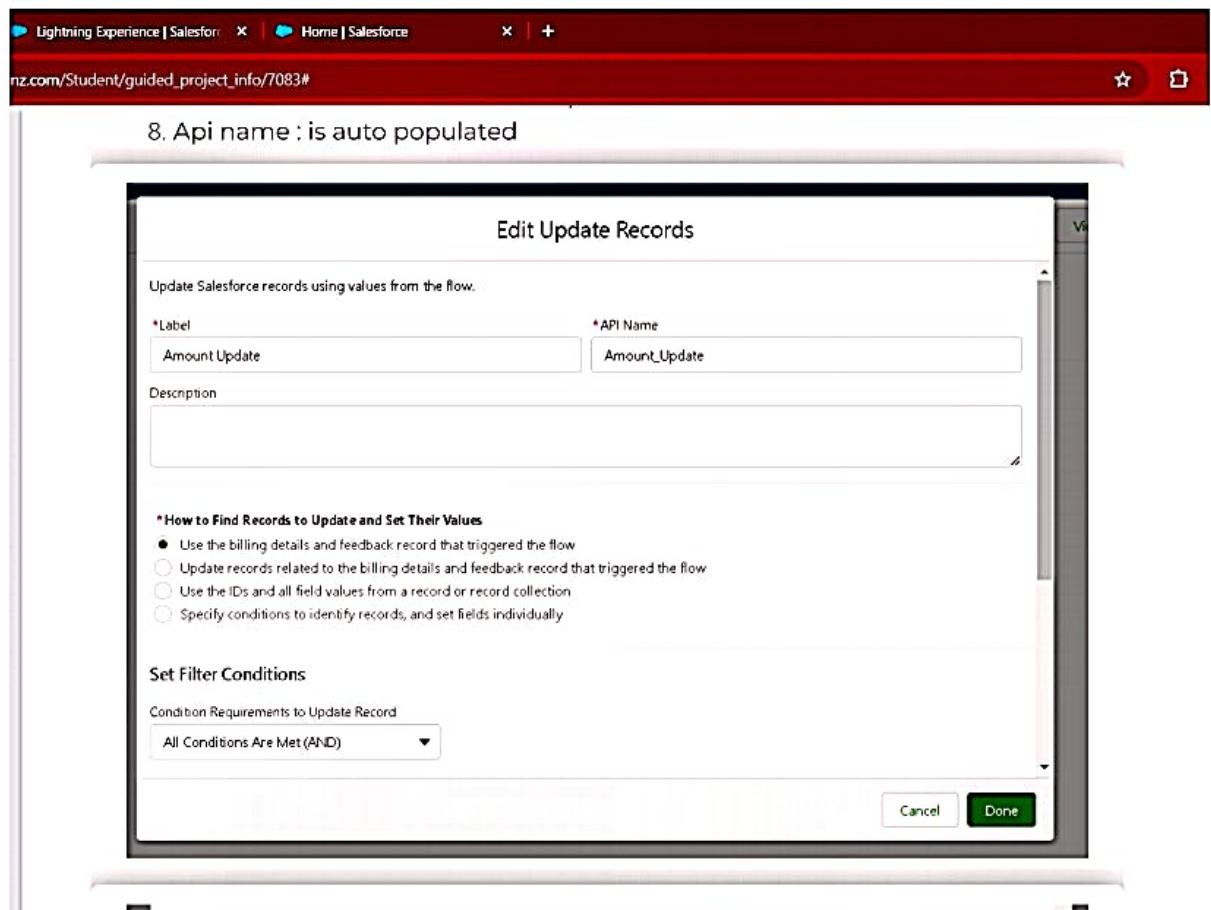
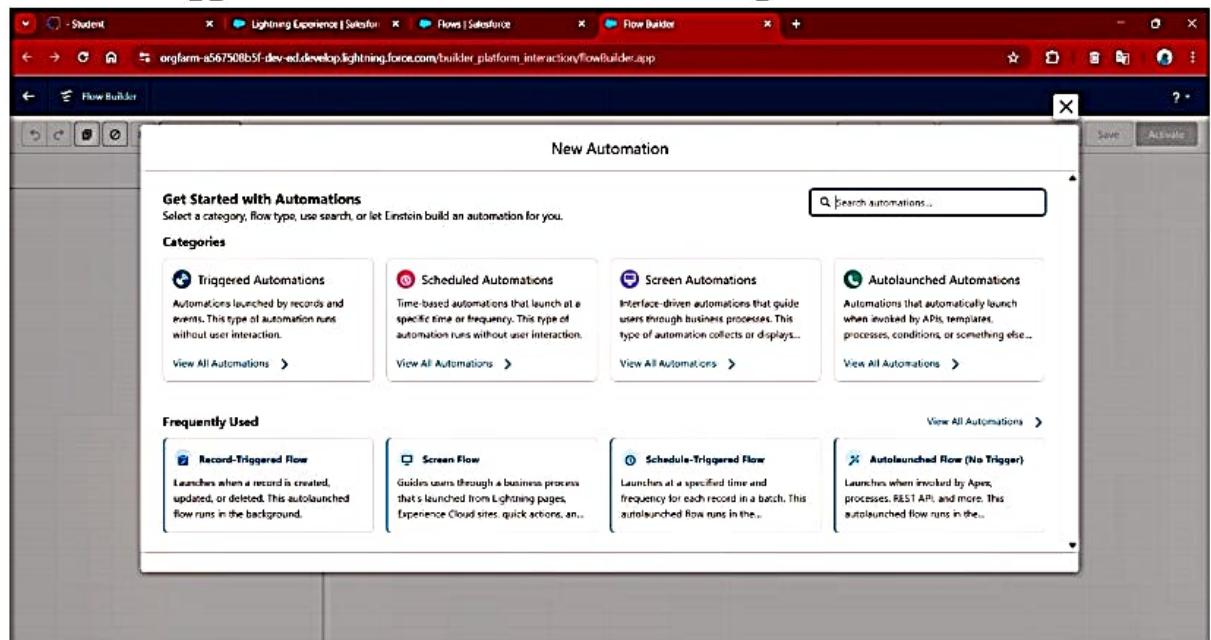
### **Non-Functional Requirements:**

- 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:**

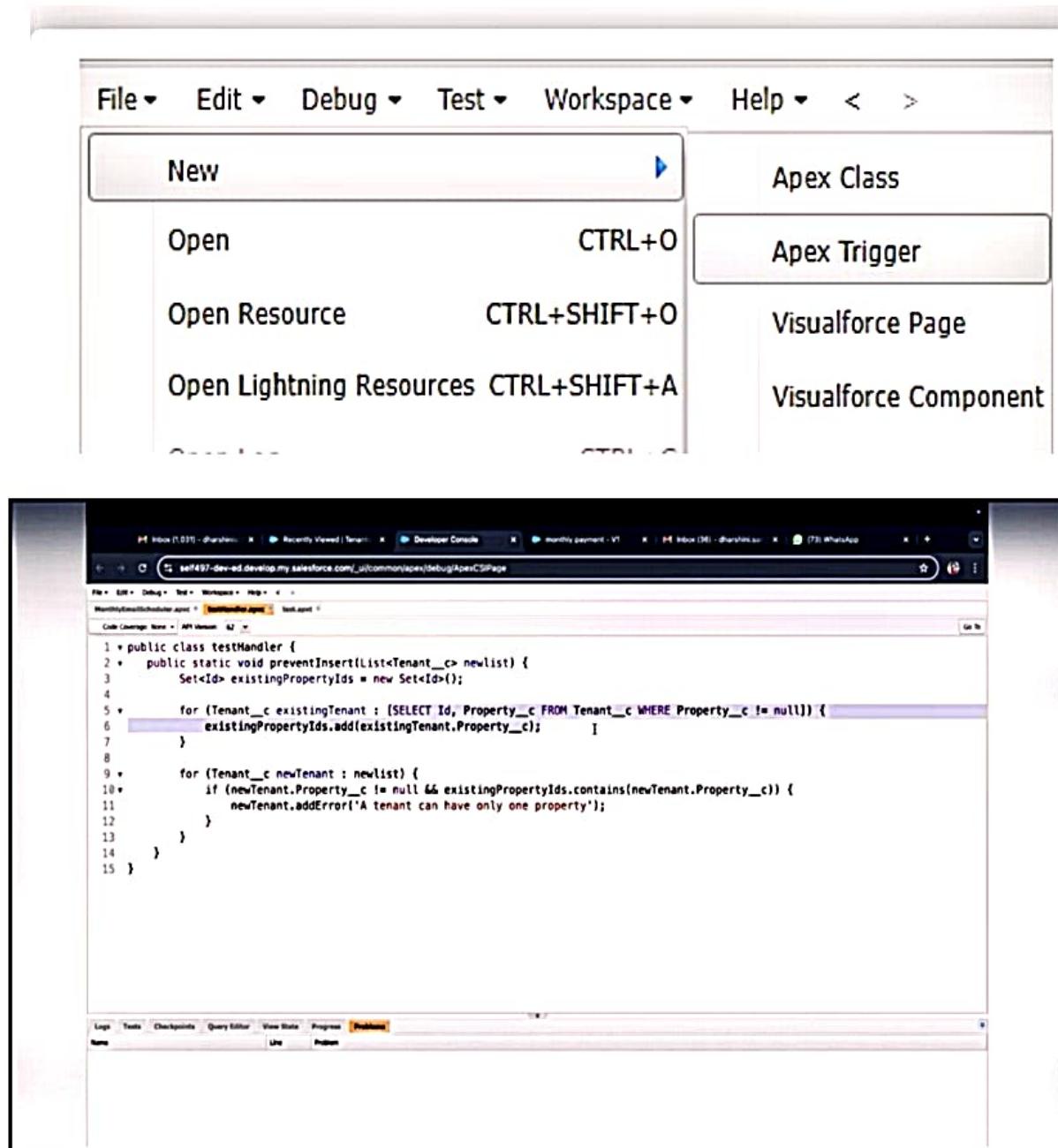
- Salesforce Objects, Flows, Apex Trigger, Validation & Duplicate Rules.**
- Reports and Dashboards for analysis.**

# 1. Record-triggered flow showing automation.



Record-Triggered Amount Update

## 2. Apex Trigger window in Developer Console.



Apex Trigger for Amount Distribution

## 5. Performance Testing

After implementation, the system underwent multiple tests. 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.

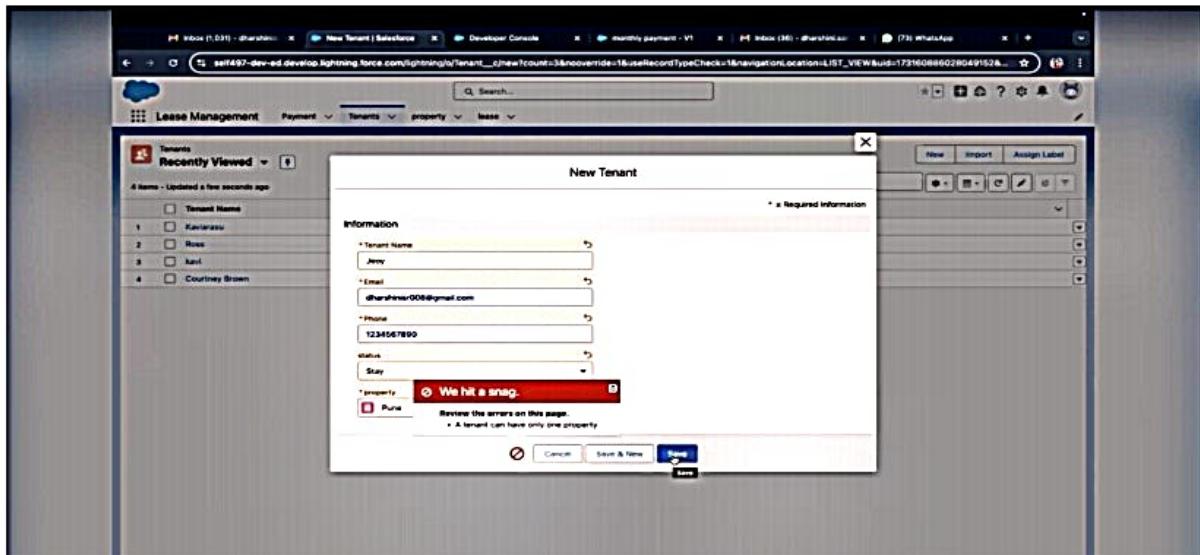
**Data Volume Testing:** Handling large datasets (thousands of lease agreements).

### 1. Created Status records for all objects.

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

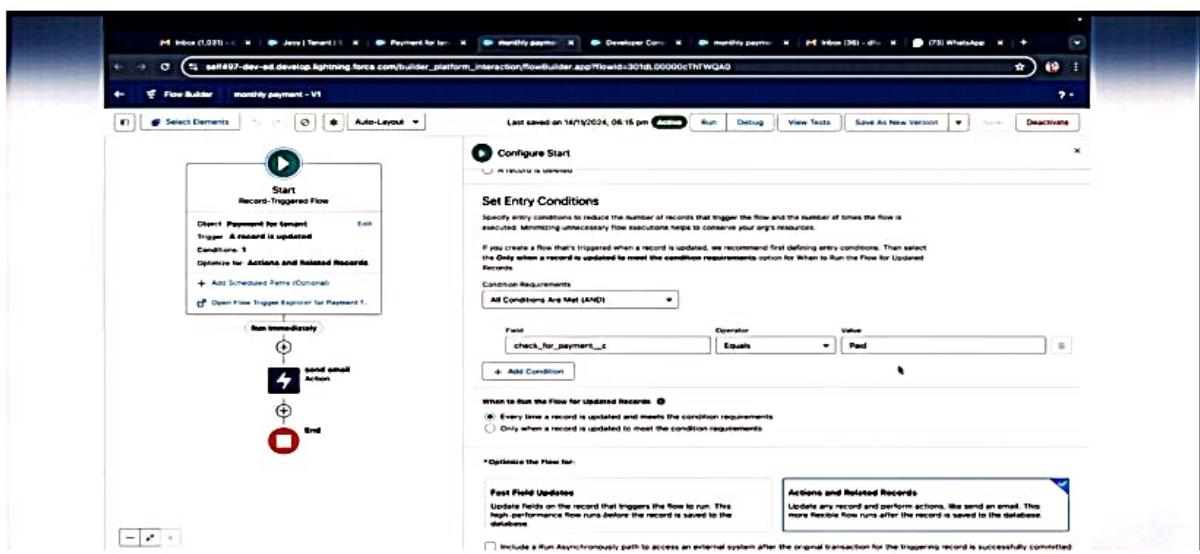
Related	Details
Service Record Name ser-010	Owner  Annapurna SmartBridge
Appointment app-016	
Quality Check Status <input checked="" type="checkbox"/>	<input type="checkbox"/>
Service Status Completed	
service date 18/11/2024	
Created By  Annapurna SmartBridge, 18/11/2024, 4:32 pm	Last Modified By  Annapurna SmartBridge, 18/11/2024, 4:34 pm

## 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.**