

LEASE MANAGEMENT

**SREE NARAYANA GURU COLLEGE,
K. G. CHAVADI, COIMBATORE**

College Code : bru36

TEAM ID : NM2025TMID26347

TEAM:

Team Leader :

PRAJAKTHA V

praju261005@gmail.com

Team Member :

ARYA PU

aryadaibl@gmail.com

Team Member :

ATHIRA H

priyapkd4@gmail.com

Team Member :

MOHAMMED SAJJAD NS

mohammedsajjad18021@gmail.com

Team Member :

SARATH K

ksarath0805@gmail.com

INTRODUCTION

1. Project Overview

The Lease Management System leverages Salesforce to simplify and automate real estate leasing operations. From managing tenants and lease contracts to handling payments and communications, it uses tools like flows, approval processes, and email alerts to ensure efficiency and accuracy. The platform also provides real-time visibility into lease performance, financial records, and tenant activities. This makes it easier for organizations to make informed decisions, improve operational efficiency, and deliver seamless leasing services.

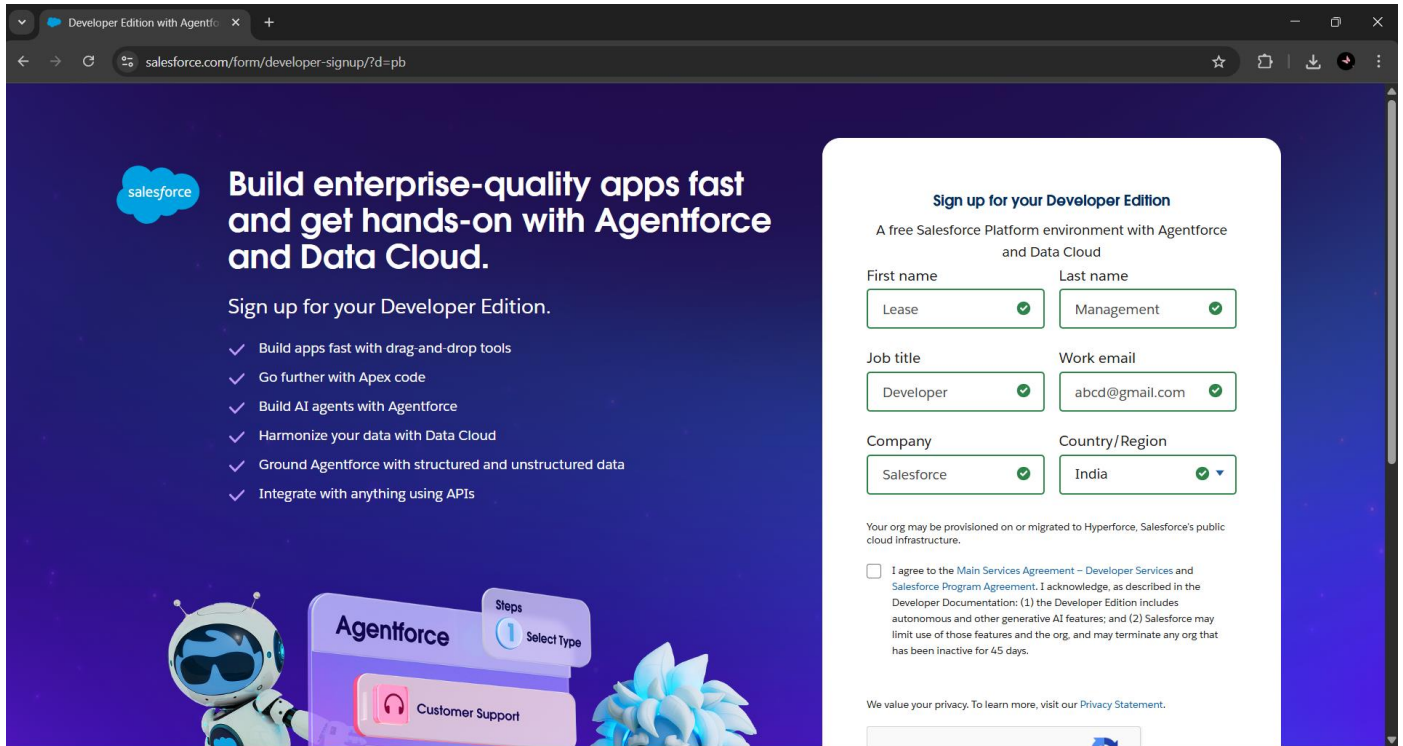
2. Purpose

The primary objective of this project is to empower organizations to efficiently manage properties, tenants, and lease-related activities within a unified system. By introducing automation, the solution reduces the need for manual intervention, thereby saving time and minimizing the chances of human error. It improves accuracy across leasing processes, ensuring that financial transactions, contracts, and tenant records remain consistent and reliable. In addition, the system enhances compliance by providing standardized workflows and timely alerts for approvals, renewals, and payments. Communication between property managers and tenants is also streamlined through built-in tools such as notifications and email alerts. Overall, the project is designed to create a seamless, efficient, and transparent leasing process that benefits both organizations and tenants.

DEVELOPMENT PHASE

1. Creating Developer Account:

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



Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud.

Sign up for your Developer Edition.

- ✓ 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
- ✓ Integrate with anything using APIs

Sign up for your Developer Edition

A free Salesforce Platform environment with Agentforce and Data Cloud

First name: Lease ✓ Last name: Management ✓

Job title: Developer ✓ Work email: abcd@gmail.com ✓

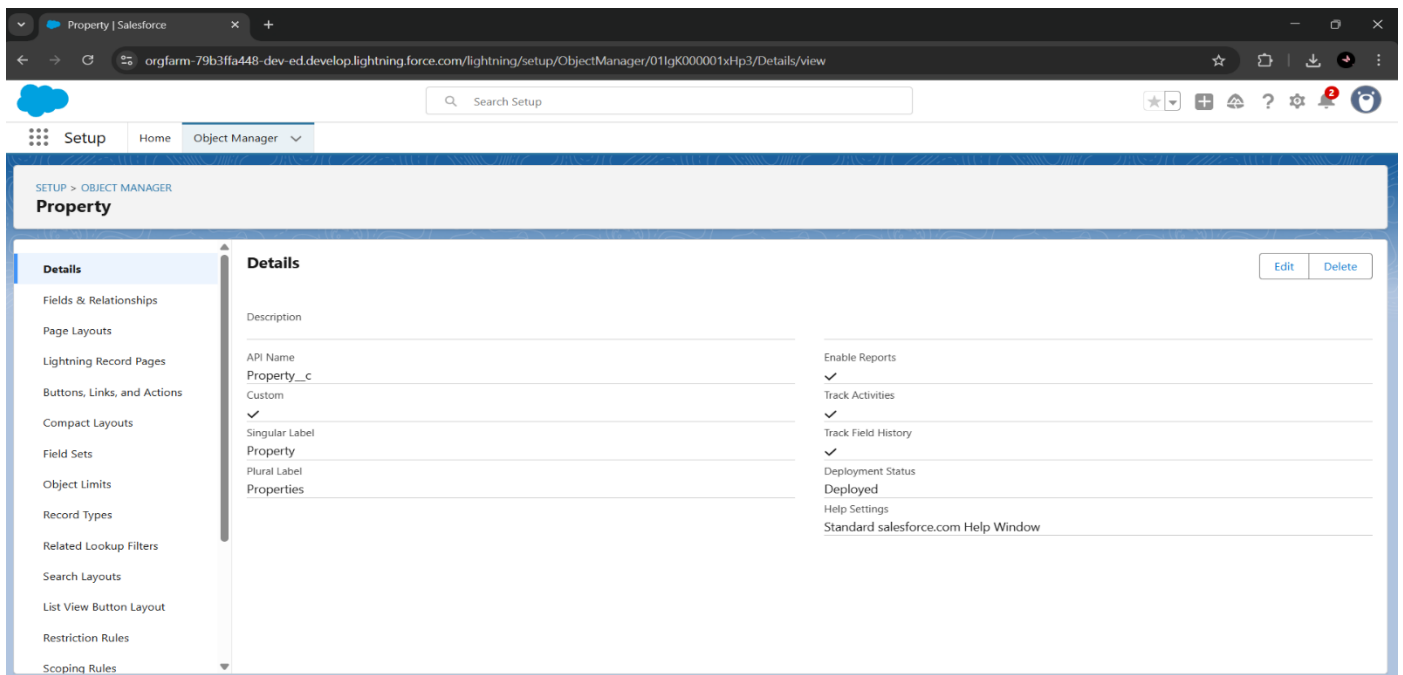
Company: Salesforce ✓ Country/Region: India ✓

Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud infrastructure.

☐ I agree to the Main Services Agreement – Developer Services and Salesforce Program Agreement. I acknowledge, as described in the Developer Documentation: (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.

We value your privacy. To learn more, visit our Privacy Statement.

2. Created objects: Property, Tenant, Lease, Payment



Property

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Details

Description

API Name: Property__c

Custom

✓ Singular Label: Property

Plural Label: Properties

Properties

Enable Reports: ✓

Track Activities: ✓

Track Field History: ✓

Deployment Status: Deployed

Help Settings: Standard salesforce.com Help Window

Tenant | Salesforce

orgfarm-79b3ffa448-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001xHt/Details/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Tenant

Edit Delete

Details

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules

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

Payment for tenant | Salesforce

orgfarm-79b3ffa448-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001xI0L/Details/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Payment for tenant

Edit Delete

Details

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules

Details

Description

API Name
Payment_for_tenant__c

Custom

Singular Label
Payment for tenant

Plural Label
Payment

Enable Reports
✓

Track Activities
✓

Track Field History
✓

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Lease | Salesforce

orgfarm-79b3ffa448-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001xI3Z/Details/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Lease

Edit Delete

Details

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules

Details

Description

API Name
Lease__c

Custom

Singular Label
Lease

Plural Label
Lease

Enable Reports
✓

Track Activities
✓

Track Field History
✓

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

3. Configured fields and relationships

Property | Salesforce

orgfarm-79b3ffa448-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001xHp3/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Property

Details

Fields & Relationships
8 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Long Text Area(32768)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Text(18)		
Owner	OwnerId	Lookup(User,Group)		✓
Property Name	Name	Text(80)		✓
sfqt	sfqt__c	Text(18)		
Type	Type__c	Picklist		

Airplane mode off

Tenant | Salesforce

orgfarm-79b3ffa448-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001xHtt/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Tenant

Details

Fields & Relationships
8 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

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

Payment for tenant | Salesforce

orgfarm-79b3ffa448-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001xl0L/FieldsAndRelationships/view

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Payment for tenant

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Fields & Relationships

9 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Number(18, 0)		
check for payment	check_for_payment__c	Picklist		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Payment date	Payment_date__c	Date		
Payment Name	Name	Text(80)		✓
Property	Property__c	Lookup(Property)		✓
Tenant	Tenant__c	Lookup(Tenant)		✓

Lease | Salesforce

orgfarm-79b3ffa448-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001xl3Z/FieldsAndRelationships/view

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Lease

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Fields & Relationships

8 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
End date	End_date__c	Date		
Last Modified By	LastModifiedById	Lookup(User)		
Lease Name	Name	Text(80)		✓
Property	Property__c	Lookup(Property)		✓
Property__c	Property__c_c	Master-Detail(Property)		✓
start date	start_date__c	Date		
Tenant	Tenant__c	Lookup(Tenant)		✓

4. Tabs

The screenshot shows the Salesforce Setup interface for Custom Tabs. The left sidebar contains a search bar with 'tabs' entered and a list of navigation items: 'User Interface', 'Rename Tabs and Labels', and 'Tabs' (which is selected). Below the sidebar, there is a message: 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Custom Tabs' and includes a sub-header 'Custom Object Tabs'. Below this, there is a table with columns 'Action', 'Label', 'Tab Style', and 'Description'. The table lists four tabs: 'Lease' (Stack of Cash), 'Payment' (Credit card), 'Properties' (Cell phone), and 'Tenants' (Presenter). Below the table, there are sections for 'Web Tabs' and 'Visualforce Tabs', both of which state 'No Web Tabs have been defined' and 'No Visualforce Tabs have been defined' respectively. The URL in the browser address bar is 'https://orgfarm-79b3ffa448-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/home'.

Action	Label	Tab Style	Description
Edit Del	Lease	Stack of Cash	
Edit Del	Payment	Credit card	
Edit Del	Properties	Cell phone	
Edit Del	Tenants	Presenter	

5. Developed Lightning App

The screenshot shows the Salesforce Lightning App Builder interface. The left sidebar contains a search bar and a list of navigation items: 'App Settings', 'App Details & Branding' (which is selected), 'App Options', 'Utility Items (Desktop Only)', 'Navigation Items', and 'User Profiles'. The main content area is titled 'App Details & Branding' and includes a sub-header 'App Details'. Below this, there are input fields for 'App Name' (Lease Management), 'Developer Name' (Lease_Management), and 'Description' (Enter a description...). To the right of these fields, there is a section for 'App Branding' which includes an 'Image' (a small image of a house) and a 'Primary Color Hex Value' (#0070D2). Below the branding section, there is a section for 'App Launcher Preview' which shows a preview of the app's appearance in the launcher, including the app's icon and name 'Lease Management'.

App Name: Lease Management

Developer Name: Lease_Management

Description: Enter a description...

App Branding

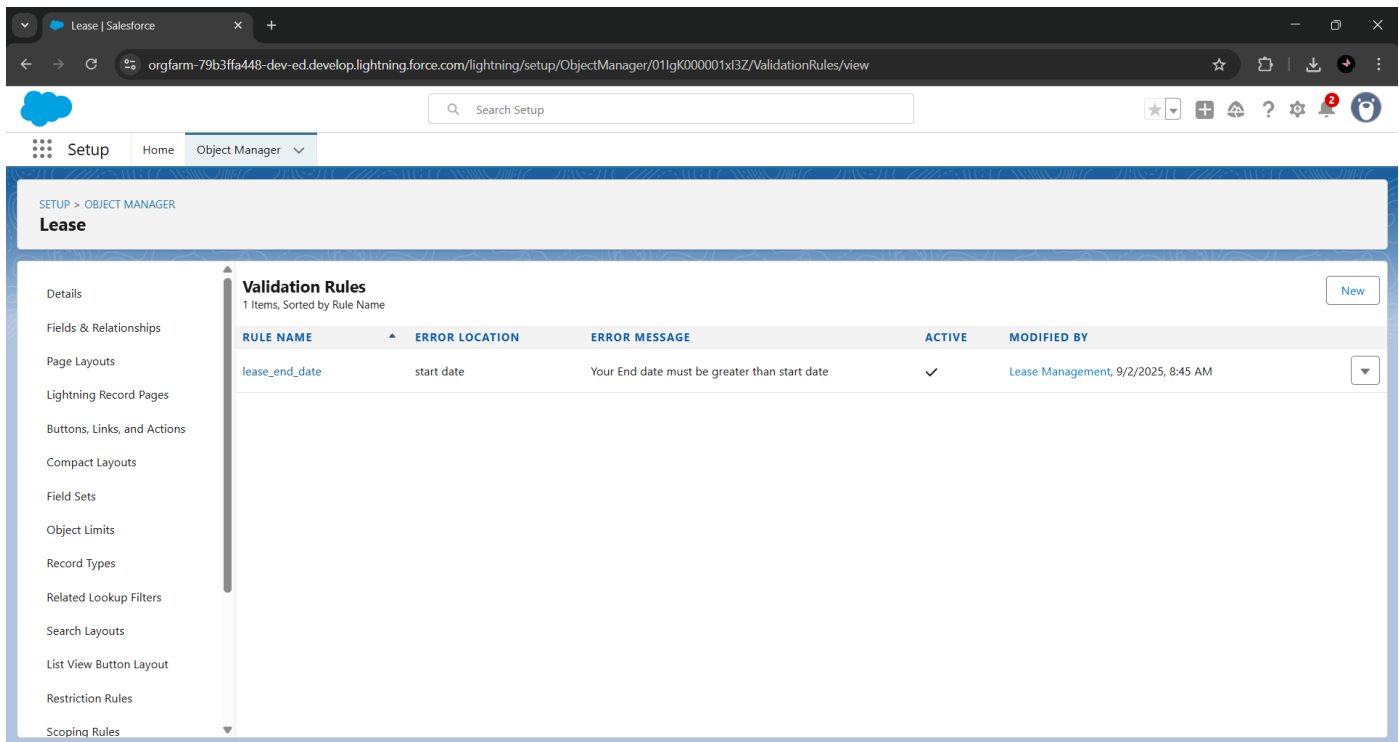
Image: [Image of a house]

Primary Color Hex Value: #0070D2

App Launcher Preview

Lease Management

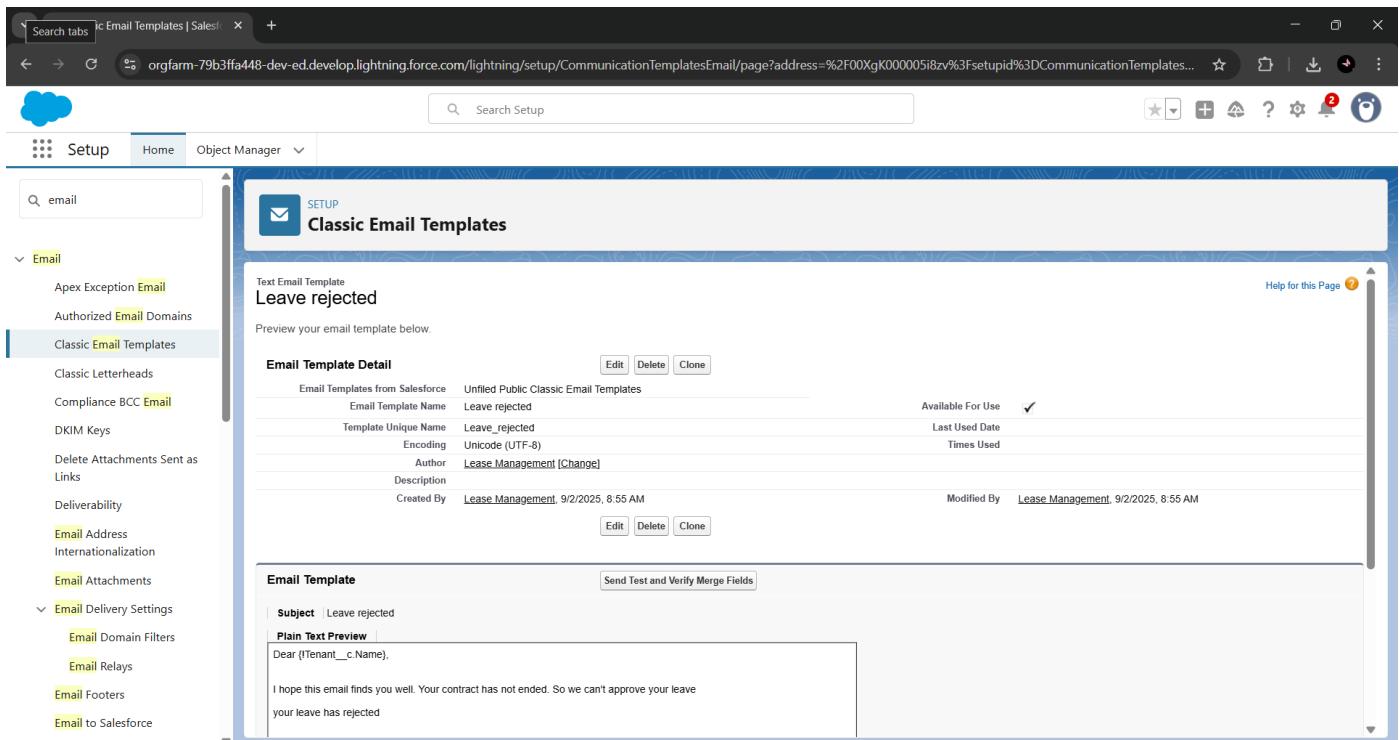
6. To create a validation rule to a Lease Object



The screenshot shows the Salesforce Setup interface for the 'Lease' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main content area is titled 'Validation Rules' and shows a table with one rule.

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
lease_end_date	start date	Your End date must be greater than start date	✓	Lease Management, 9/2/2025, 8:45 AM

7. Built and tested email templates for leave request, approval, rejection, payment, and reminders



The screenshot shows the Salesforce Setup interface for 'Classic Email Templates'. The left sidebar has a search bar and a list of categories including Email, Apex Exception Email, Authorized Email Domains, Classic Email Templates, Classic Letterheads, Compliance BCC Email, DKIM Keys, Delete Attachments Sent as Links, Deliverability, Email Address Internationalization, Email Attachments, Email Delivery Settings, Email Domain Filters, Email Relays, Email Footers, and Email to Salesforce. The main content area is titled 'Classic Email Templates' and shows a 'Text Email Template' named 'Leave rejected'.

Email Template Detail

Field	Value
Email Template Name	Leave rejected
Template Unique Name	Leave_rejected
Encoding	Unicode (UTF-8)
Author	Lease Management (Change)
Description	
Created By	Lease Management, 9/2/2025, 8:55 AM
Modified By	Lease Management, 9/2/2025, 8:55 AM

Email Template

Subject: Leave rejected

Plain Text Preview

Dear (Tenant__c Name),

I hope this email finds you well. Your contract has not ended. So we can't approve your leave

your leave has rejected

Classic Email Templates | Salesforce

orgfarm-79b3ffa448-dev-ed.develop.lightning.force.com/lightning/setup/CommunicationTemplatesEmail/page?address=%2F00XgK000005hzZq%3Fsetupid%3DCommunicationTemplates...

Search Setup

Setup Home Object Manager

email

Email

Apex Exception Email

Authorized Email Domains

Classic Email Templates

Classic Letterheads

Compliance BCC Email

DKIM Keys

Delete Attachments Sent as Links

Deliverability

Email Address Internationalization

Email Attachments

Email Delivery Settings

Email Domain Filters

Email Relays

Email Footers

Email to Salesforce

SETUP

Classic Email Templates

Text Email Template

Leave approved

Preview your email template below.

Help for this Page

Email Template Detail

Edit Delete Clone

Email Templates from Salesforce

Unified Public Classic Email Templates

Email Template Name

Leave approved

Available For Use

✓

Template Unique Name

Leave_approved

Last Used Date

Encoding

Unicode (UTF-8)

Times Used

Author

Lease Management (Change)

Description

Created By

Lease Management 9/2/2025, 8:53 AM

Modified By

Lease Management 9/2/2025, 8:53 AM

Edit Delete Clone

Email Template

Send Test and Verify Merge Fields

Subject

Leave approved

Plain Text Preview

dear({Tenant__c.Name}).

I hope this message finds you well. I am writing to inform you that I have received your email confirming the approval of my leave request. I would like to express my gratitude for considering and approving my time off.

your leave is approved. You can leave now.

Classic Email Templates | Salesforce

orgfarm-79b3ffa448-dev-ed.develop.lightning.force.com/lightning/setup/CommunicationTemplatesEmail/page?address=%2F00XgK000005i9vy%3Fsetupid%3DCommunicationTemplates...

Search Setup

Setup Home Object Manager

email

Email

Apex Exception Email

Authorized Email Domains

Classic Email Templates

Classic Letterheads

Compliance BCC Email

DKIM Keys

Delete Attachments Sent as Links

Deliverability

Email Address Internationalization

Email Attachments

Email Delivery Settings

Email Domain Filters

Email Relays

Email Footers

Email to Salesforce

SETUP

Classic Email Templates

Text Email Template

tenant payment

Preview your email template below.

Help for this Page

Email Template Detail

Edit Delete Clone

Email Templates from Salesforce

Unified Public Classic Email Templates

Email Template Name

tenant payment

Available For Use

✓

Template Unique Name

tenant_payment

Last Used Date

Encoding

Unicode (UTF-8)

Times Used

Author

Lease Management (Change)

Description

Created By

Lease Management 9/2/2025, 9:01 AM

Modified By

Lease Management 9/2/2025, 9:01 AM

Edit Delete Clone

Email Template

Send Test and Verify Merge Fields

Subject

Confirmation of Successful Monthly Payment

Plain Text Preview

Dear ({Tenant__c.Email__c}).

We hope this email finds you well. We are writing to inform you that we have successfully received your monthly payment. Thank you for your prompt and diligent payment.

Classic Email Templates | Salesf...

orgfarm-79b3ffa448-dev-ed.develop.lightning.force.com/lightning/setup/CommunicationTemplatesEmail/page?address=%2F00XgK000005iCFV%3Fsetupid%3DCommunicationTemplates...

Search Setup

Setup Home Object Manager

email

Email

Apex Exception Email

Authorized Email Domains

Classic Email Templates

Classic Letterheads

Compliance BCC Email

DKIM Keys

Delete Attachments Sent as Links

Deliverability

Email Address

Internationalization

Email Attachments

Email Delivery Settings

Email Domain Filters

Email Relays

Email Footers

Email to Salesforce

SETUP

Classic Email Templates

Text Email Template

Tenant Email

Preview your email template below.

Help for this Page

Email Template Detail

Edit Delete Clone

Email Templates from Salesforce

Unified Public Classic Email Templates

Email Template Name

Tenant Email

Available For Use

✓

Template Unique Name

Tenant_Email

Last Used Date

Encoding

Unicode (UTF-8)

Times Used

Author

Lease Management (Change)

Description

Created By

Lease Management 9/2/2025, 8:57 AM

Modified By

Lease Management 9/6/2025, 5:08 AM

Edit Delete Clone

Email Template

Send Test and Verify Merge Fields

Subject

Urgent: Monthly Rent Payment Reminder

Plain Text Preview

Dear {!Tenant__c.Name},

I trust this email finds you well. We appreciate your continued tenancy at our property and I hope you have been comfortable in your residence.

This communication is a friendly reminder regarding your monthly rent payment, which is currently outstanding. As outlined in

Classic Email Templates | Salesf...

orgfarm-79b3ffa448-dev-ed.develop.lightning.force.com/lightning/setup/CommunicationTemplatesEmail/page?address=%2F00XgK000005iBMF%3Fsetupid%3DCommunicationTemplates...

Search Setup

Setup Home Object Manager

email

Email

Apex Exception Email

Authorized Email Domains

Classic Email Templates

Classic Letterheads

Compliance BCC Email

DKIM Keys

Delete Attachments Sent as Links

Deliverability

Email Address

Internationalization

Email Attachments

Email Delivery Settings

Email Domain Filters

Email Relays

Email Footers

Email to Salesforce

SETUP

Classic Email Templates

Text Email Template

tenant leaving

Preview your email template below.

Help for this Page

Email Template Detail

Edit Delete Clone

Email Templates from Salesforce

Unified Public Classic Email Templates

Email Template Name

tenant leaving

Available For Use

✓

Template Unique Name

tenant_leaving

Last Used Date

Encoding

Unicode (UTF-8)

Times Used

Author

Lease Management (Change)

Description

Created By

Lease Management 9/2/2025, 8:51 AM

Modified By

Lease Management 9/6/2025, 5:06 AM

Edit Delete Clone

Email Template

Send Test and Verify Merge Fields

Subject

request for approve the leave

Plain Text Preview

Dear {!Tenant__c.CreatedBy},

Please approve my leave

Text Email Template: tenant leaving ~ Salesforce - Developer Edition

https://orgfarm-79b3ffa448-dev-ed.develop.my.salesforce.com/one/app#/alohaRedirect/00XgK000005iBMF?setupid=CommunicationTemplatesEmail&isdtpp=pl

8. Approval Process creation

For Tenant Leaving:

The screenshot shows the Salesforce Setup page for an approval process named 'Tenant: Tenant Approval'. The left sidebar contains navigation links for Data, Feature Settings, and Process Automation, with 'Approval Processes' selected. The main content area displays the 'Process Definition Detail' for the 'Tenant Approval' process. The process is active and has a unique name of 'Tenant_Approval'. The entry criteria is 'Tenant: Status EQUALS Stay', and the record editability is 'Administrator ONLY'. The initial submission actions include a 'Record Lock' action. The approval steps table shows one step named 'Tenant Approval' with a manually chosen approver and a final rejection behavior.

Approval Processes | Salesforce

orgfarm-79b3ffa448-dev-ed.develop.lightning.force.com/lightning/setup/ApprovalProcesses/page?address=%2F04agK000000Ciz3

Setup Home Object Manager

Q appr

Approval Processes

Tenant: Tenant Approval

Process Definition Detail

Process Name: Tenant Approval

Unique Name: Tenant_Approval

Description: Next Automated Approver Determined By

Entry Criteria: Tenant: Status EQUALS Stay

Record Editability: Administrator ONLY

Approval Assignment Email Template

Initial Submitters: Tenant Owner

Created By: Lease Management, 9/6/2025, 10:51 AM

Modified By: Lease Management, 9/6/2025, 10:55 AM

Initial Submission Actions

Action Type: Record Lock

Description: Lock the record from being edited

Approval Steps

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Show Actions Edit Del	1	Tenant Approval			Manually Chosen	Final Rejection

For Check for Vacant:

The screenshot shows the Salesforce Setup page for an approval process named 'Tenant: check for vacant'. The left sidebar contains navigation links for Data, Feature Settings, and Process Automation, with 'Approval Processes' selected. The main content area displays the 'Process Definition Detail' for the 'check for vacant' process. The process is active and has a unique name of 'check_for_vacant'. The entry criteria is 'Tenant: Status NOT EQUAL TO Leaving', and the record editability is 'Administrator ONLY'. The initial submission actions include a 'Record Lock' action and an 'Email Alert' action. The approval steps table is empty, indicating that no steps have been defined yet.

Approval Processes | Salesforce

orgfarm-79b3ffa448-dev-ed.develop.lightning.force.com/lightning/setup/ApprovalProcesses/page?address=%2F04agK000000CZbV

Setup Home Object Manager

Q appr

Approval Processes

Tenant: check for vacant

Process Definition Detail

Process Name: check for vacant

Unique Name: check_for_vacant

Description: Next Automated Approver Determined By

Entry Criteria: Tenant: Status NOT EQUAL TO Leaving

Record Editability: Administrator ONLY

Approval Assignment Email Template

Initial Submitters: Tenant Owner

Created By: Lease Management, 9/6/2025, 5:16 AM

Modified By: Lease Management, 9/6/2025, 5:19 AM

Initial Submission Actions

Action Type: Record Lock

Description: Lock the record from being edited

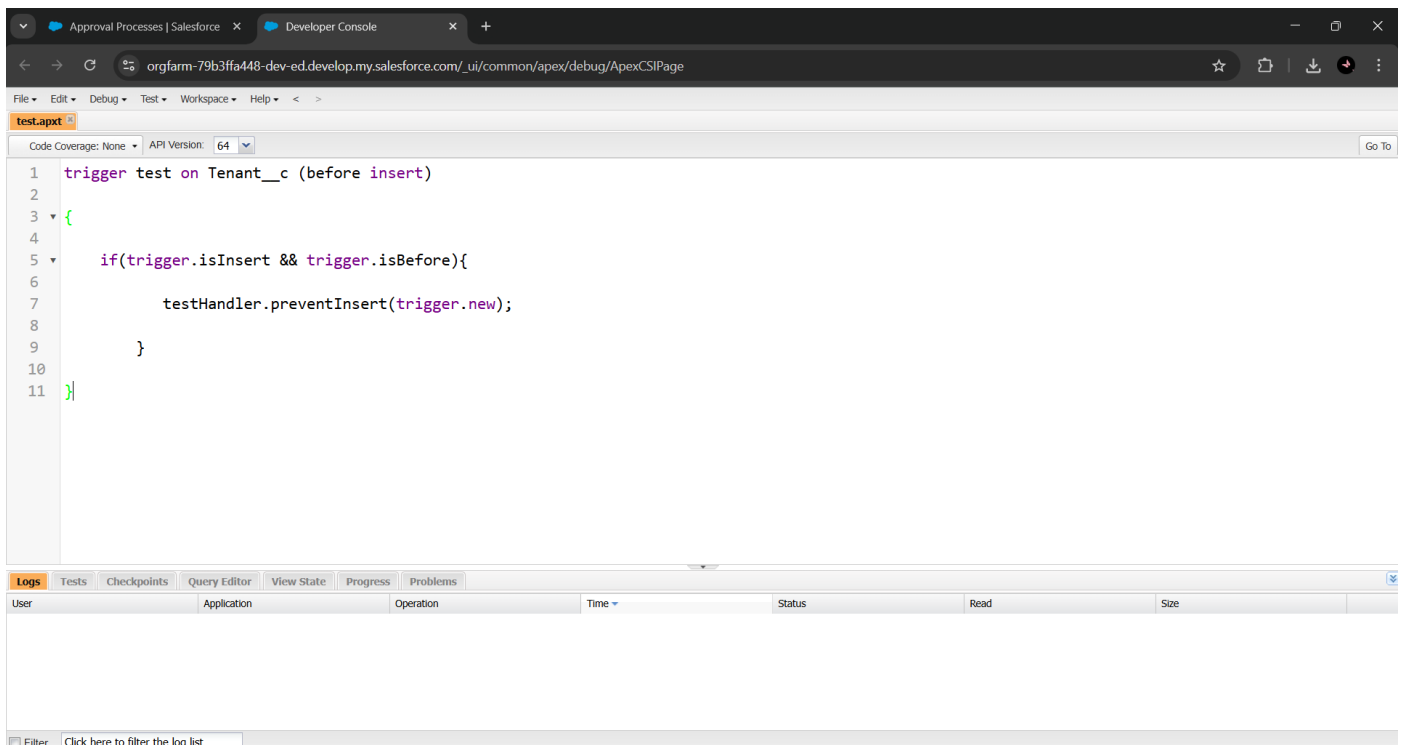
Email Alert: please approve my leave

Approval Steps

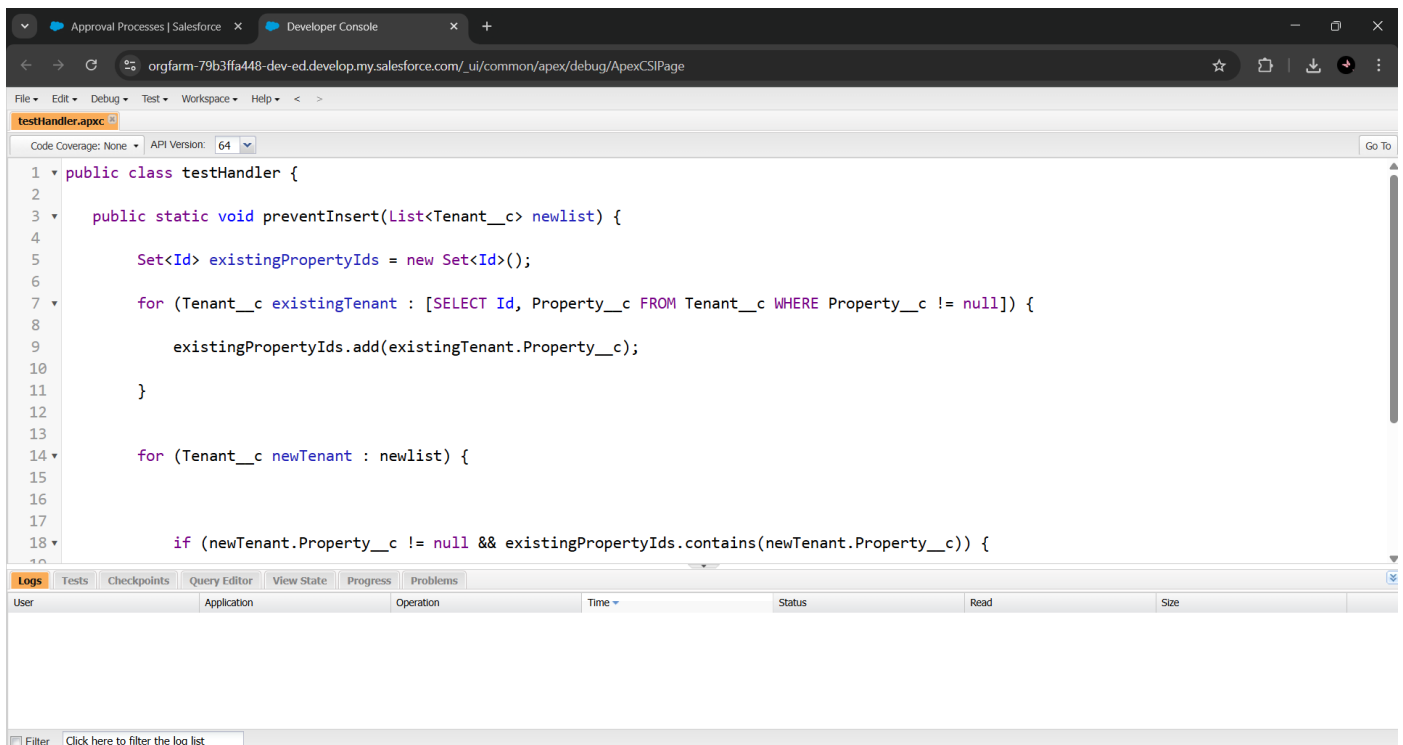
You have not yet defined any approval steps

9. Apex Trigger

Create an Apex Trigger



Create an Apex Handler class



10. FLOWS

The screenshot shows the Salesforce Flow Builder interface for a flow named "monthly payment - V1". The flow is a Record-Triggered Flow with the following configuration:

- Object:** Payment for tenant
- Trigger:** A record is updated
- Conditions:** 1
- Optimize for:** Actions and Related Records

The flow steps are:

- Run Immediately** (Start)
- send email** (Action)
- End** (End)

The right sidebar shows the "Configure Start" configuration:

- Select Object:** Payment for tenant
- Configure Trigger:**
 - Trigger the Flow When:
 - ☐ A record is created
 - ☒ A record is updated
 - ☐ A record is created or updated
 - ☐ A record is deleted
- Set Entry Conditions:**
 - Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.
 - If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.
 - Condition Requirements: All Conditions Are Met (AND)

The screenshot shows the Salesforce Flow Builder interface for the same flow, now with the "Send Email" action selected. The flow steps are:

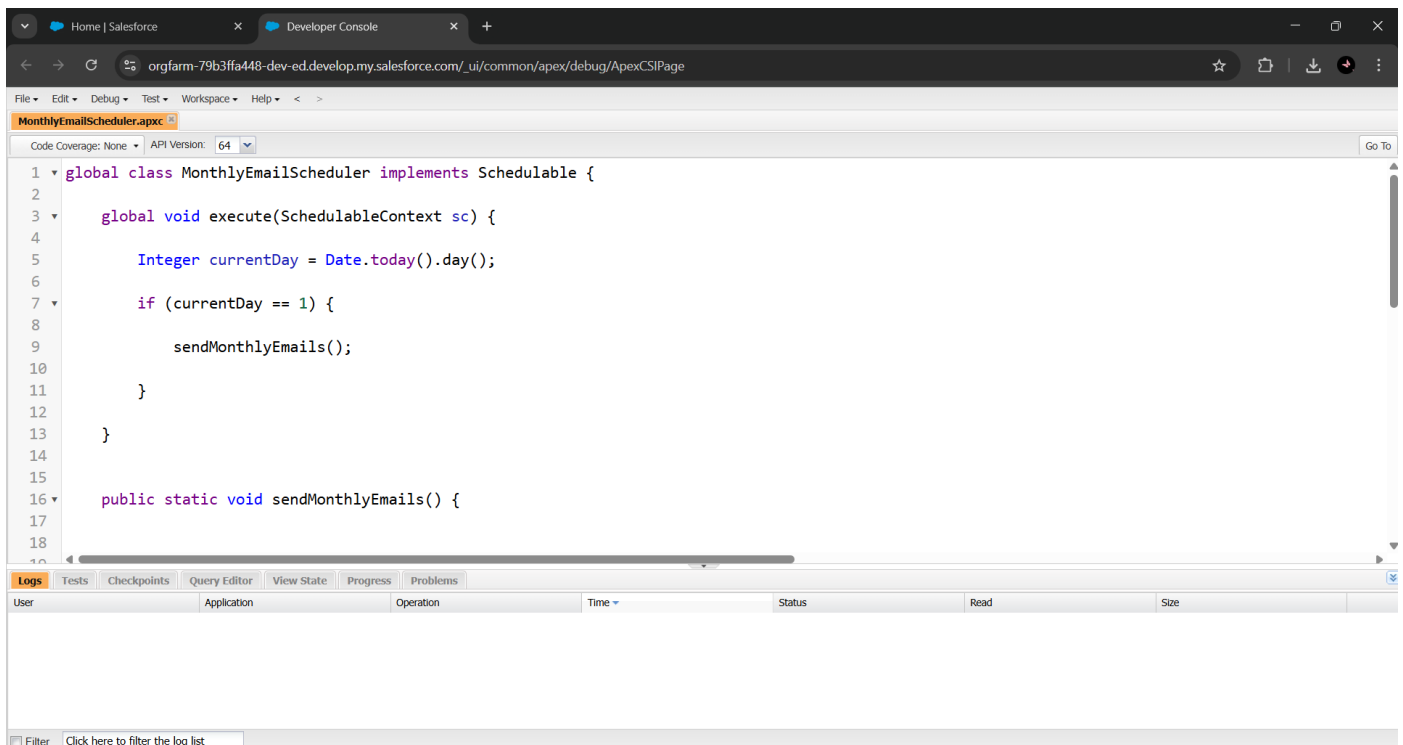
- Run Immediately** (Start)
- send email** (Action)
- End** (End)

The right sidebar shows the "Send Email" configuration:

- Label:** send email
- API Name:** send_email
- Description:**
- Set Input Values:**
 - Configure Recipient Details:**
 - Recipient Address List:** A record is being updated for Payment for tenant > Tenant > Email
 - Recipient Address Collection:** Enter value or search resources...
 - CC Recipient Address List:**

11. Schedule class:

Create an Apex Class

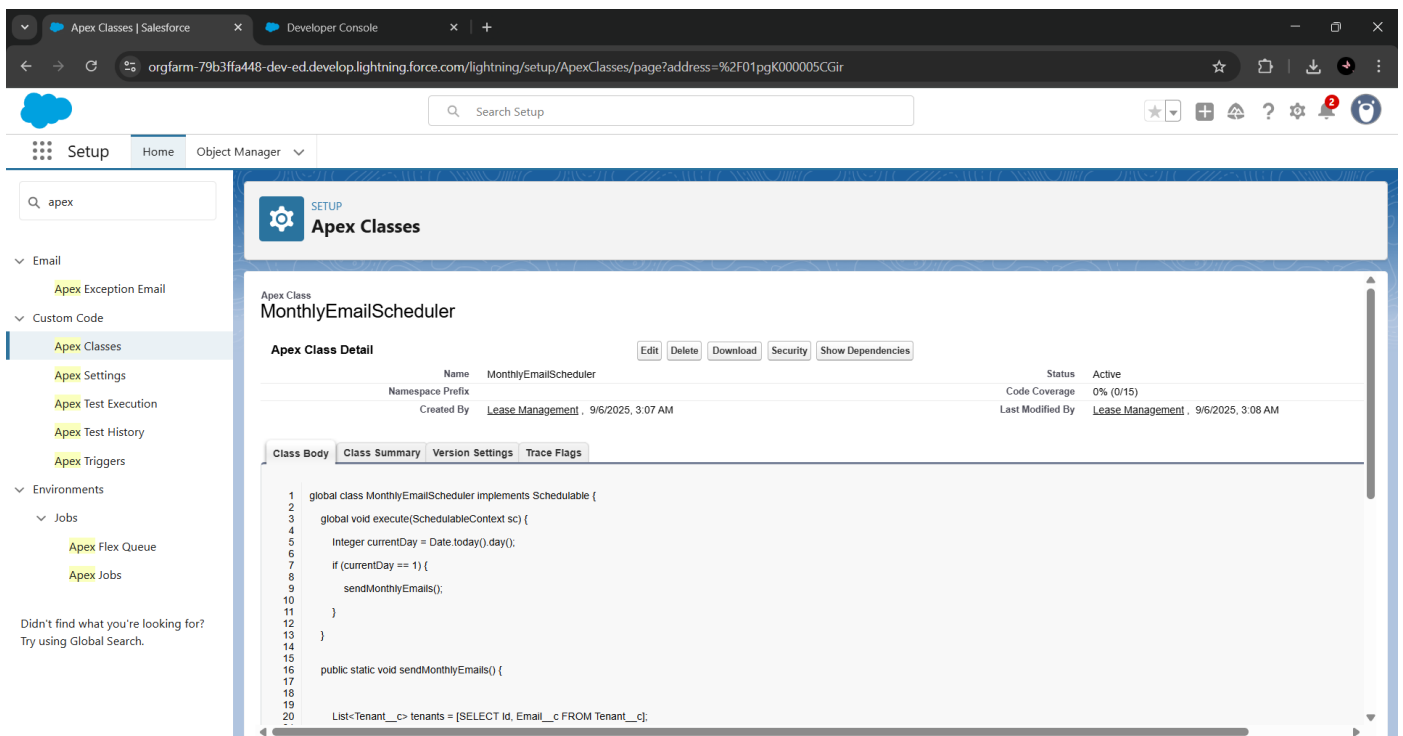


The screenshot shows the Salesforce Developer Console with the 'MonthlyEmailScheduler.apxc' file open. The code is as follows:

```
1 global class MonthlyEmailScheduler implements Schedulable {
2
3     global void execute(SchedulableContext sc) {
4
5         Integer currentDay = Date.today().day();
6
7         if (currentDay == 1) {
8
9             sendMonthlyEmails();
10
11         }
12     }
13 }
14
15 public static void sendMonthlyEmails() {
```

Below the code editor, there is a 'Logs' tab and a table with columns: User, Application, Operation, Time, Status, Read, and Size. The table is currently empty.

Schedule Apex class



The screenshot shows the Salesforce Setup page for the 'MonthlyEmailScheduler' Apex Class. The left sidebar shows the navigation menu with 'Apex Classes' selected. The main content area displays the 'Apex Class Detail' for 'MonthlyEmailScheduler'.

Apex Class Detail

Name	MonthlyEmailScheduler	Status	Active
Namespace Prefix		Code Coverage	0% (0/15)
Created By	Lease Management	Last Modified By	Lease Management
	9/6/2025, 3:07 AM		9/6/2025, 3:08 AM

Class Body

```
1 global class MonthlyEmailScheduler implements Schedulable {
2
3     global void execute(SchedulableContext sc) {
4
5         Integer currentDay = Date.today().day();
6
7         if (currentDay == 1) {
8
9             sendMonthlyEmails();
10
11         }
12     }
13 }
14
15 public static void sendMonthlyEmails() {
16
17     List<Tenant__c> tenants = [SELECT Id, Email__c FROM Tenant__c];
```

Lease Management

Payment

Tenants

property

lease

Tenant

Aswini

New Contact

DOB

New Opportunity

Related

Details

+ Required Information

* Tenant Name

Aswini

Owner

Sowmya Team

* Email

aswinikumarand11@gmail.com

Phone

(974) 422-5567

Status

Leasing

property

Shenan

Created By

Sowmya Team 6/26/2025, 6:05 AM

Last Modified By

Sowmya Team 6/26/2025, 11:06 PM

Activity

New Case

New Lead

Details

Close

Change Owner

Reassign View

Submit for Approval

Get Leads

Filters: All Items • All Activities

Refresh

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.

Lease Management

Payment

Tenants

property

lease

Tenant

Aswini

Tenant was submitted for approval.

New Contact

DOB

New Opportunity

Related

Details

+ Required Information

* Tenant Name

Aswini

Owner

Sowmya Team

* Email

aswinikumarand11@gmail.com

Phone

(974) 422-5567

Status

Leasing

property

Shenan

Created By

Sowmya Team 6/26/2025, 6:05 AM

Last Modified By

Sowmya Team 6/26/2025, 11:06 PM

Cancel

Save

Activity

Filters: All Items • All Activities • All Types

Refresh

Expanded 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.

Lease Management

Payment

Tenants

property

lease

Aswini Approved

Photo

Aswini

Tenant Approval

Approved

Submitter

Sowmya Team

Date Submitted

Jun 27, 2025

Action Required

Sowmya Team

Assigned To

Sowmya Team

Details

Approval Details

Tenant Name

Aswini

Owner

Sowmya Team

property

Shenan

Notifications

10:05 AM 6/27/2025

Approval request for the tenant is approved

Aswini

4 hrs 10 mins ago

Approval request for the tenant is rejected

Aswini

4 hrs 10 mins ago

Approval request for the tenant is approved

Aswini

4 hrs 10 mins ago

Approval request for the tenant is approved

Aswini

4 hrs 10 mins ago

Approval request for the tenant is approved

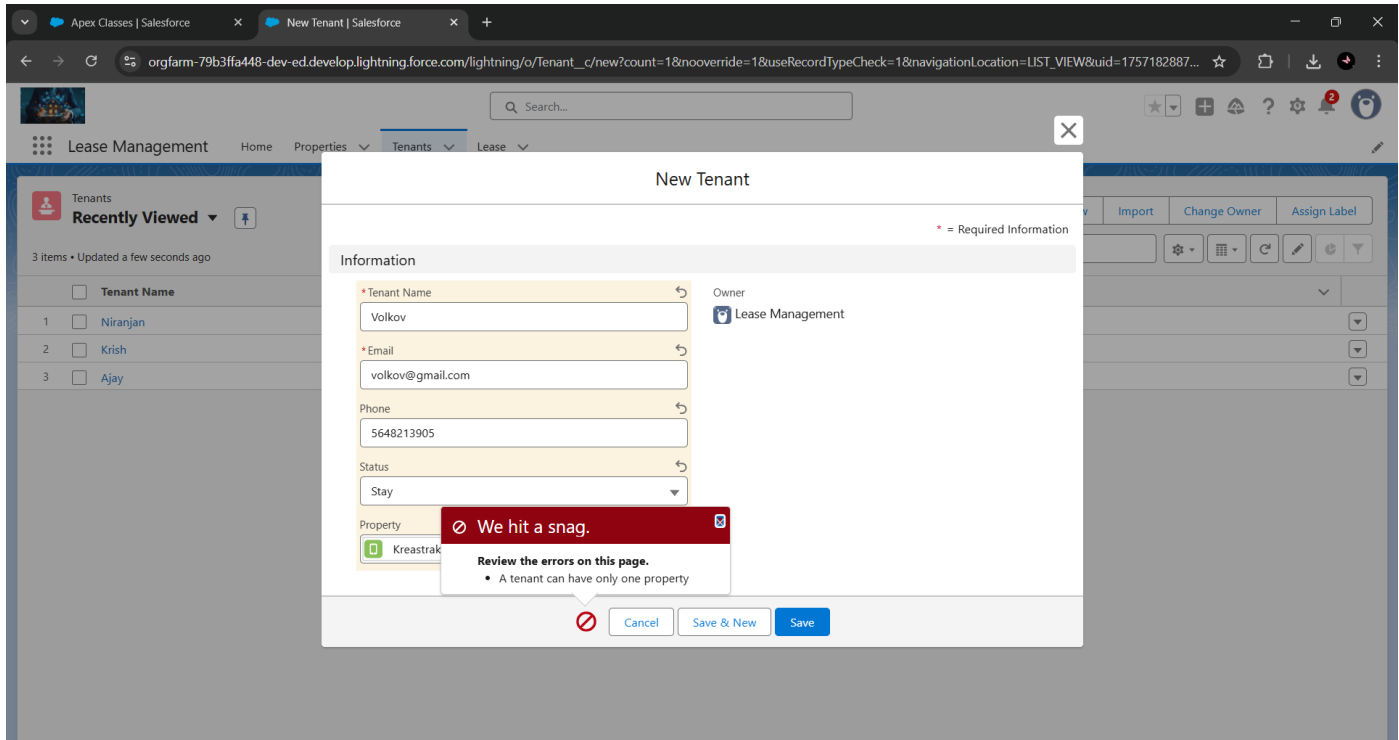
Shenan

15 hours ago

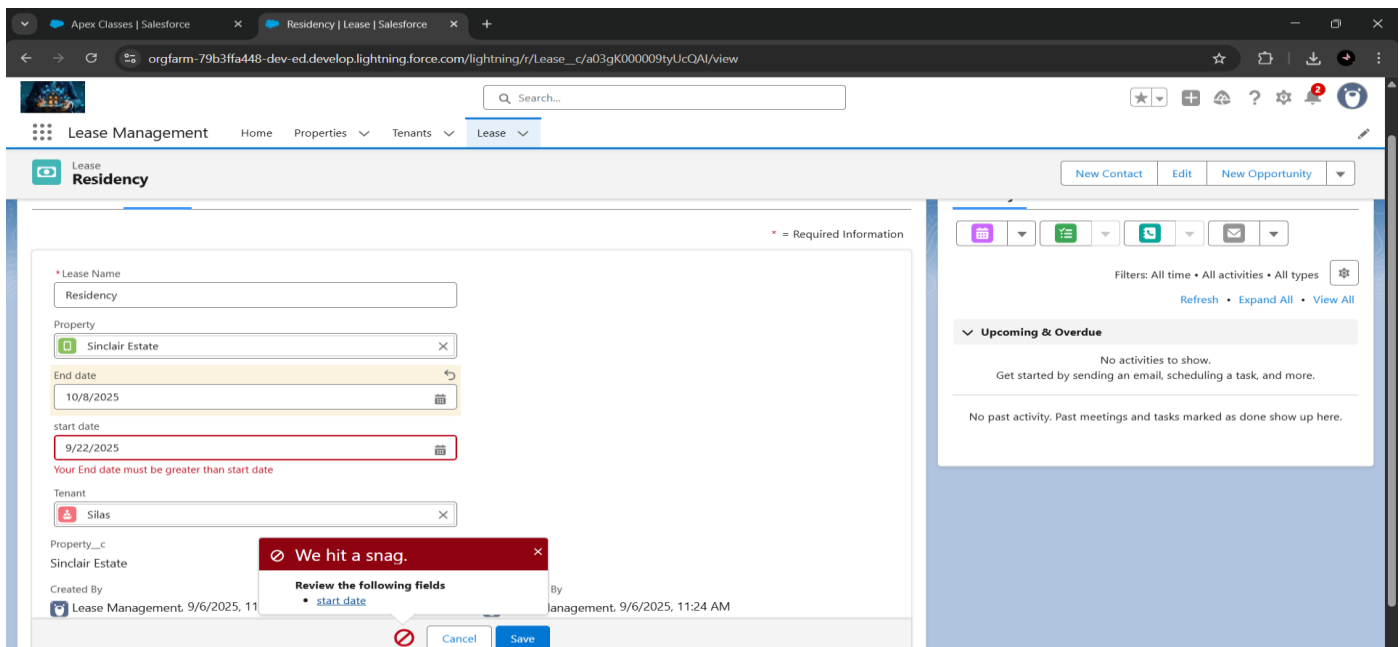
FUNCTIONAL AND PERFORMANCE TESTING

1. Performance Testing

Trigger validation by entering duplicate tenant-property records



Validation Rule checking



ADVANTAGES & DISADVANTAGES

✓ Advantages

1. **Operational Efficiency** – Automates routine tasks such as lease renewals, payment tracking, and tenant communication, reducing manual workload and saving time.
2. **Improved Accuracy** – Minimizes human errors in contracts, financial records, and compliance requirements through automated workflows and validations.
3. **Enhanced Compliance** – Ensures adherence to lease terms, legal obligations, and organizational policies with built-in approval processes and alerts.
4. **Centralized Data Management** – Provides a single platform to store and manage tenant information, lease documents, and financial data, improving accessibility and transparency.
5. **Better Communication** – Strengthens engagement between property managers and tenants through automated notifications, reminders, and email alerts.
6. **Scalability** – Supports organizational growth by handling an increasing number of properties, tenants, and contracts without additional manual effort.
7. **Data-Driven Insights** – Offers reporting and analytics features for informed decision-making and strategic planning.

Disadvantages

1. **High Initial Setup Cost** – Implementation may require significant investment in customization, licensing, and integration with existing systems.
2. **Training Requirements** – Users may need training to fully understand and utilize Salesforce features, which can take time and resources.
3. **Dependency on Internet and Platform** – As a cloud-based system, it relies heavily on stable internet connectivity and the Salesforce platform's uptime.
4. **Customization Complexity** – Advanced customization to meet unique business needs may require technical expertise, potentially increasing dependency on developers.
5. **Data Security Concerns** – Although Salesforce provides strong security, organizations must still manage data privacy risks, especially when handling sensitive tenant and financial information.
6. **Change Management Challenges** – Transitioning from traditional methods to an automated system may face resistance from staff who are accustomed to manual processes.

CONCLUSION

The Lease Management System is a Salesforce-driven solution that transforms the way organizations manage properties, tenants, and lease-related activities. By automating key processes, centralizing data, and improving communication, it reduces manual effort, enhances accuracy, and ensures stronger compliance with regulatory and organizational standards. While the project may involve challenges such as implementation costs, training requirements, and change management, these are outweighed by its long-term advantages, including operational efficiency, scalability, and improved tenant satisfaction. Overall, the system not only streamlines leasing operations but also equips organizations with the tools to make data-driven decisions, strengthen relationships, and achieve sustainable growth in an increasingly competitive real estate landscape.

APPENDIX

Source Code: Provided in Apex Classes and Triggers

Test.apxt:

Trigger Code:

```
trigger test on Tenant__c (before insert)
{
    if(trigger.isInsert && trigger.isBefore){
        testHandler.preventInsert(trigger.new);
    }
}
```

testHandler.apxc:

```

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');

            }

        }

    }

}

```

MonthlyEmailScheduler.apxc:

```

global class MonthlyEmailScheduler implements Schedulable {

    global void execute(SchedulableContext sc) {

        Integer currentDay = Date.today().day();

        if (currentDay == 1) {

            sendMonthlyEmails();

        }

    }

}

```

```

    }

    public static void sendMonthlyEmails() {
        List<Tenant__c> tenants = [SELECT Id, Email__c FROM Tenant__c];

        for (Tenant__c tenant : tenants) {
            String recipientEmail = tenant.Email__c;

            String emailContent = 'I trust this email finds you well. I am writing to remind
you that the monthly rent is due Your timely payment ensures the smooth functioning
of our rental arrangement and helps maintain a positive living environment for all.';

            String emailSubject = 'Reminder: Monthly Rent Payment Due';

            Messaging.SingleEmailMessage email = new
Messaging.SingleEmailMessage();

            email.setToAddresses(new String[]{recipientEmail});

            email.setSubject(emailSubject);

            email.setPlainTextBody(emailContent);

            Messaging.sendEmail(new Messaging.SingleEmailMessage[]{email});
        }
    }
}

```