

LEAST MANAGEMENT

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1.INTRODUCTION

1.1 Project Overview

The Lease Management System is a Salesforce-based application designed to streamline the processes associated with leasing real estate properties. It handles tenant management, lease contracts, payments, and communication with automation features such as flows, approval processes, and email alerts.



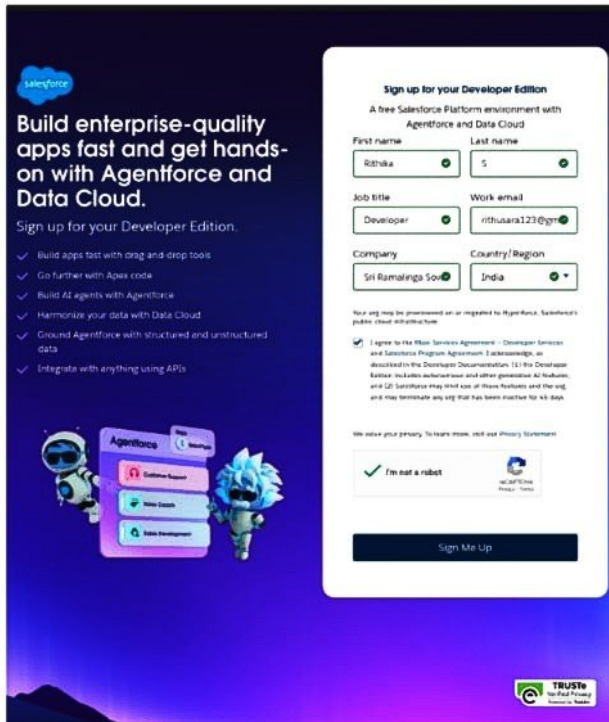
1.2 Purpose

The main objective of the project is to enable organizations to efficiently manage properties, tenants, and lease-related activities. It reduces manual intervention, improves accuracy, and ensures better compliance and communication.

DEVELOPMENT PHASE

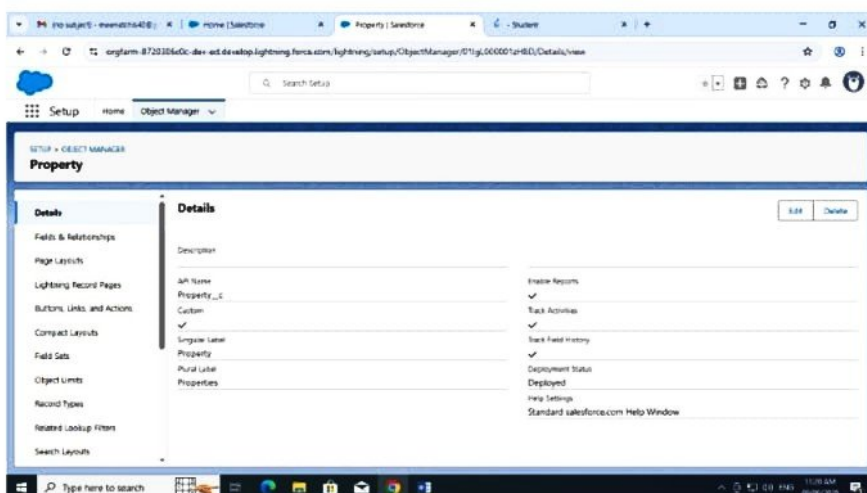
Creating Developer Account:

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



The image shows the Salesforce Developer Edition signup page. On the left, there's a blue sidebar with the Salesforce logo and text: "Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud." Below this, it says "Sign up for your Developer Edition." and lists several benefits: "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". There are also icons for "Agentforce", "Customer Support", "Data Cloud", and "Sales Development". On the right, there's a white form titled "Sign up for your Developer Edition". It includes fields for "First name" (Rithika), "Last name" (S), "Job title" (Developer), "Work email" (rithusara123@gmail.com), "Company" (Sri Ramalinga Sova), and "Country/Region" (India). Below these fields, there's a checkbox for "I agree to the Salesforce Terms of Service" and a "Sign Me Up" button. At the bottom right, there's a "TRUSTE" logo.

● Created objects: Property, Tenant, Lease, Payment



Browser tabs: (no subject) - meenatchi402@p, Home | Salesforce, Tenant | Salesforce, - Student

Address bar: orgfarm-87203060c-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/011gl000001zHUr/Details/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

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

Details Edit Delete

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

Browser tabs: (no subject) - meenatchi402@p, Home | Salesforce, lease | Salesforce, - Student

Address bar: orgfarm-87203060c-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/011gl000001zHUr/Details/view

Search Setup

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

Details Edit Delete

Description

API Name
lease_c

Custom
✓

Singular Label
lease

Plural Label
lease

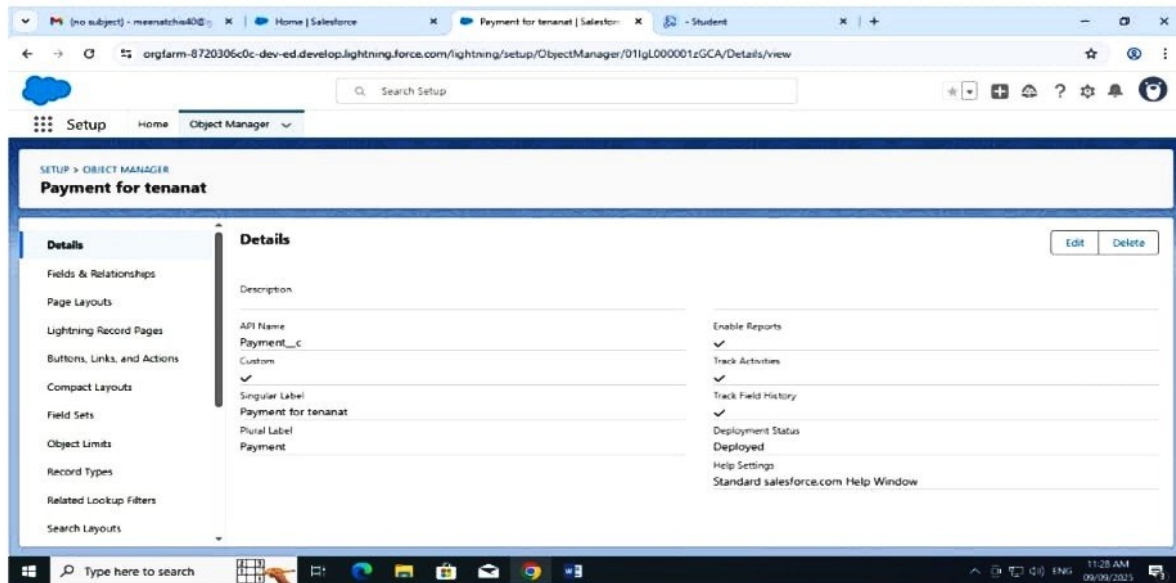
Enable Reports
✓

Track Activities
✓

Track Field History
✓

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window



- Configured fields and relationships

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(12 TB)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Text(255)		
Owner	OwnerId	Lookup(User Group)		✓
Property Name	Name	Text(80)		✓
stgt	stgt__c	Text(18)		
Type	Type__c	Picklist		

Setup > OBJECT MANAGER

Payment for tenanat

Details

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)		✓

Browser tabs: (no subject) - meenatchi40@, Home | Salesforce, lease | Salesforce, - Student

Address bar: orgfarm-87203060c-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgL000001zIU5/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

lease

Details

Fields & Relationships

7 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)		✓
Owner	OwnerId	Lookup(User,Group)		✓
Property	Property__c	Lookup(Property)		✓
start date	start_date__c	Date		

Type here to search

11:33 AM 09/09/2025

Browser tabs: (no subject) - meenatchi40@, Home | Salesforce, Tenant | Salesforce, - Student

Address bar: orgfarm-87203060c-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgL000001zHUn/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Tenant

Details

Fields & Relationships

8 Items, Sorted by Field Label

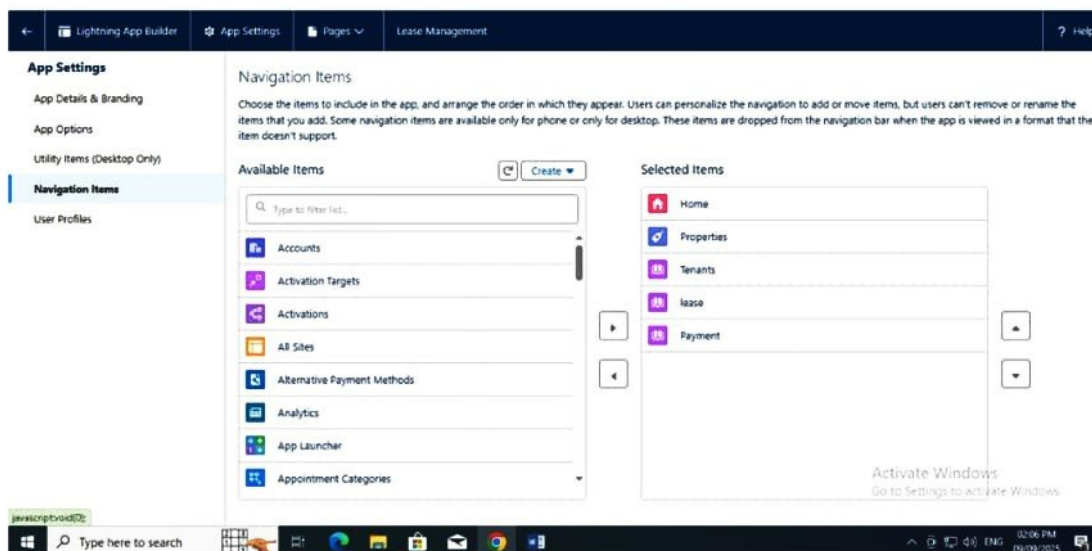
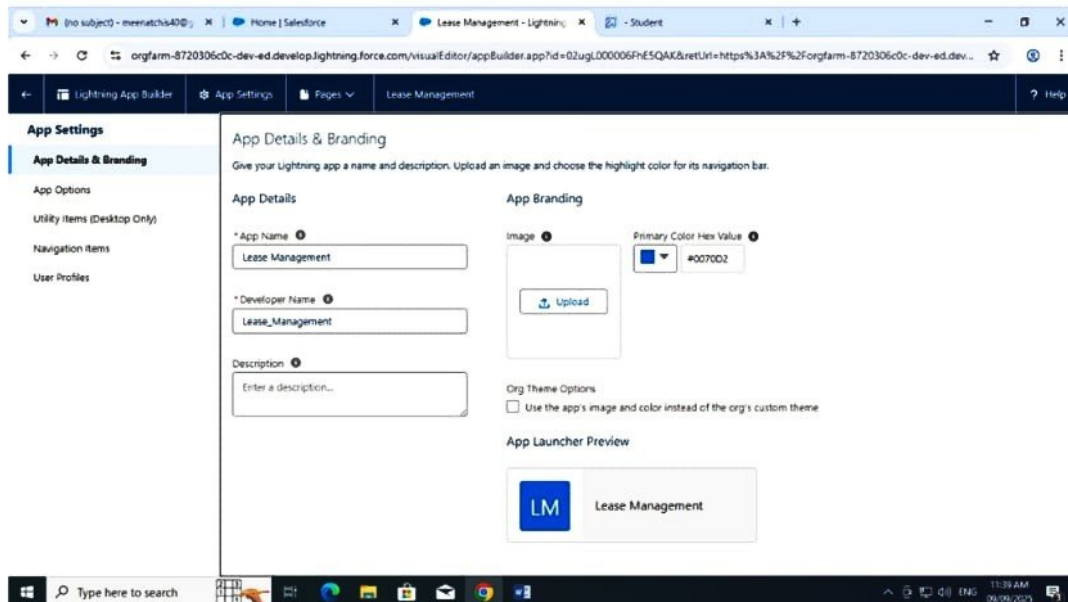
Quick Find New Deleted Fields Field Dependencies Set History Tracking

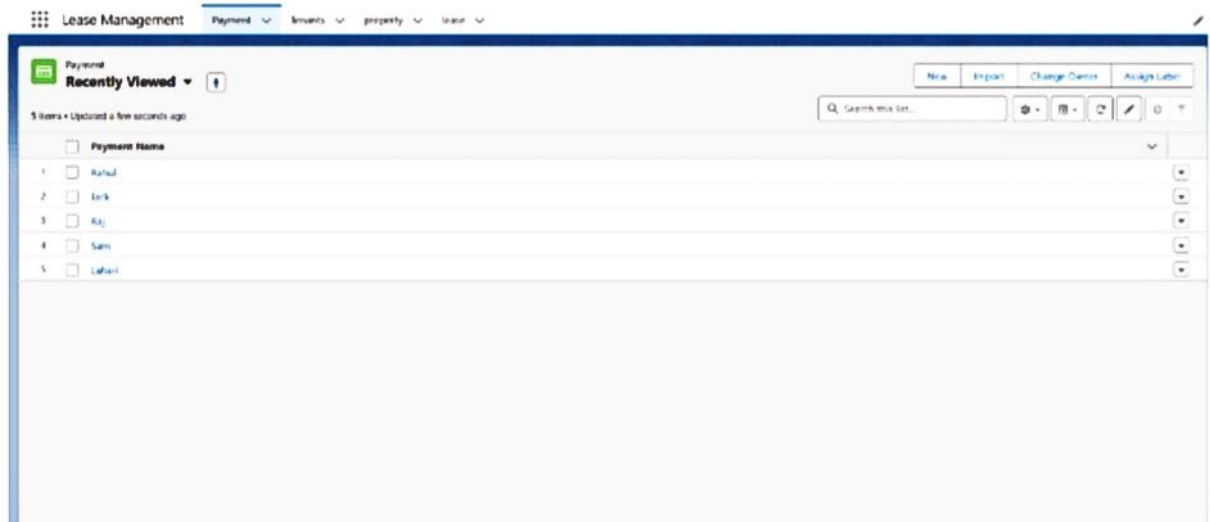
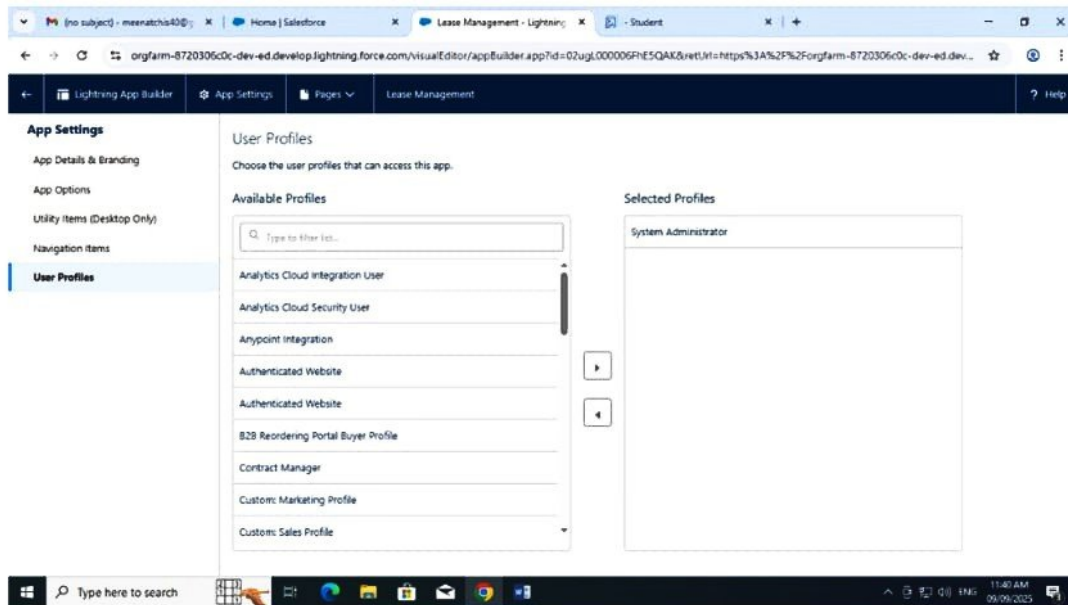
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone	Phone__c	Phone		
Property	Property__c	Lookup(Property)		✓
status	status__c	Picklist		
Tenant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

Type here to search

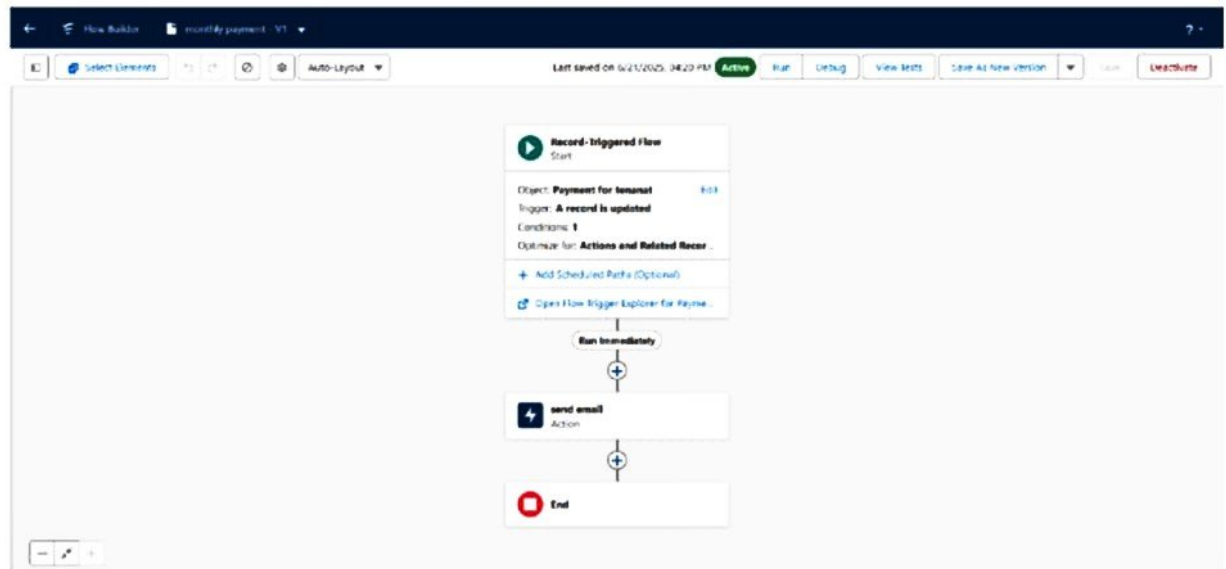
11:34 AM 09/09/2025

- Developed Lightning App with relevant tabs

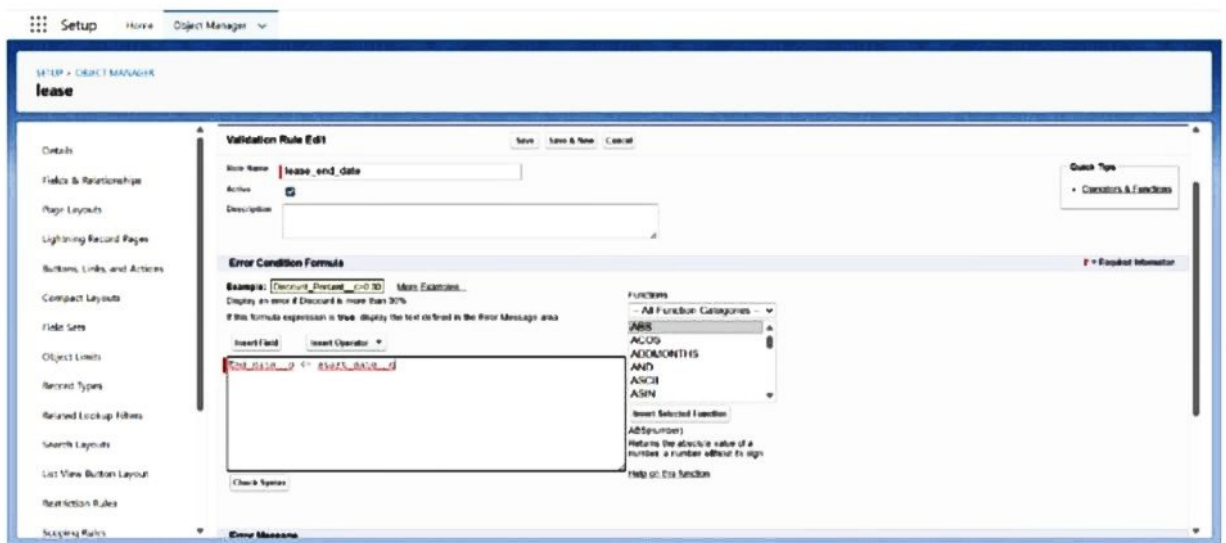


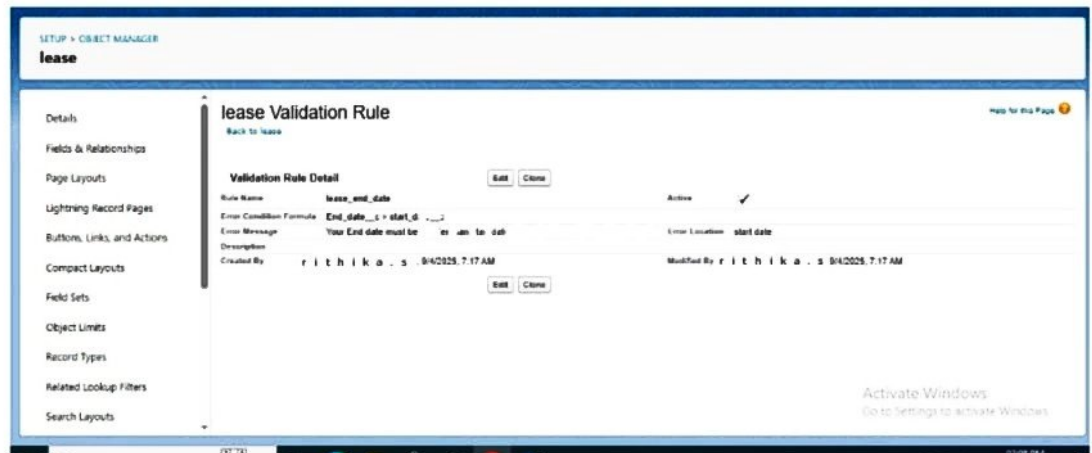


- Implemented Flows for monthly rent and payment success

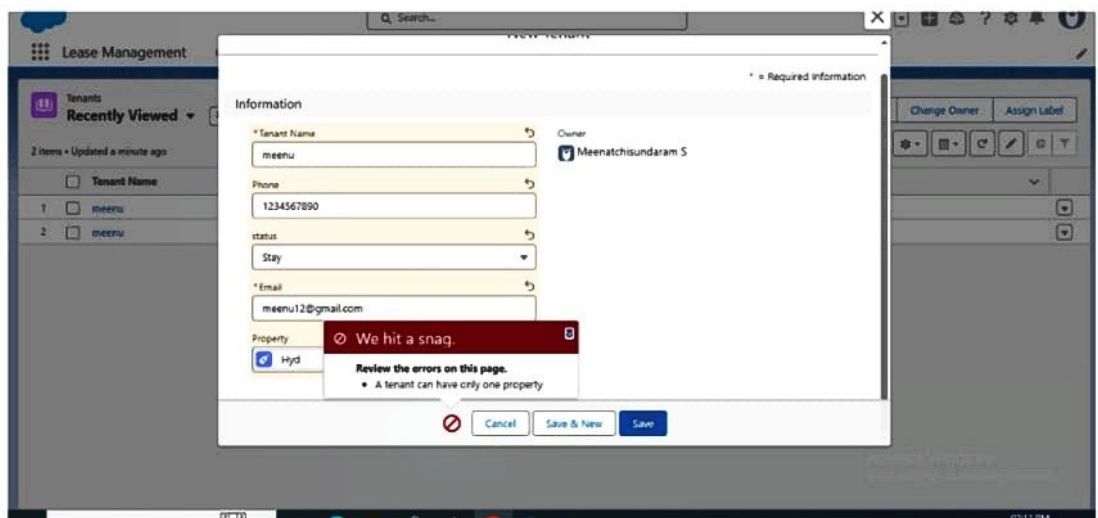


- To create a validation rule to a Lease Object





- Added Apex trigger to restrict multiple tenants per property



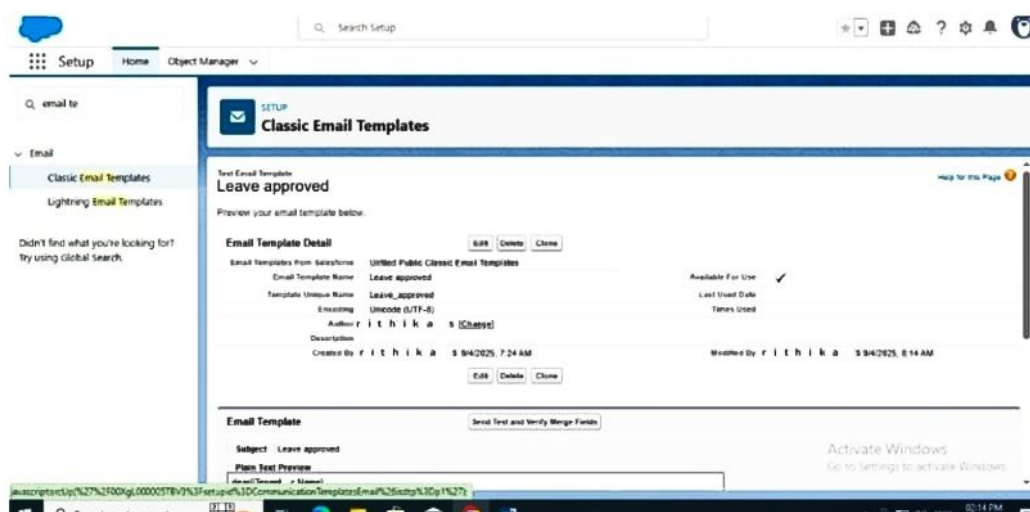
- Scheduled monthly reminder emails using Apex class

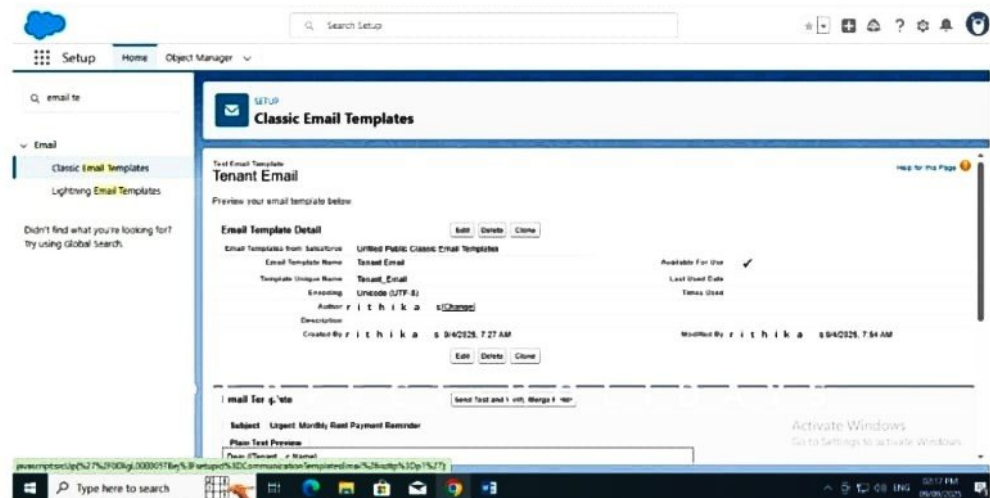
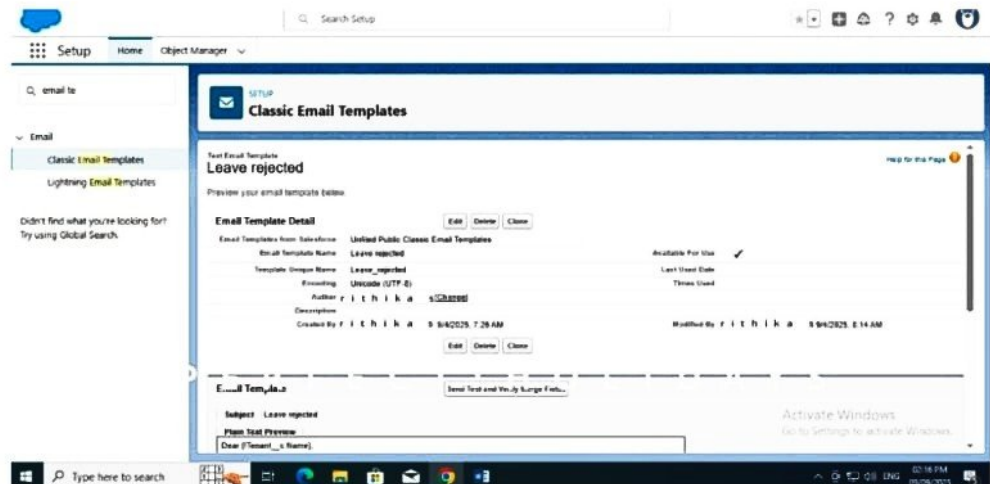
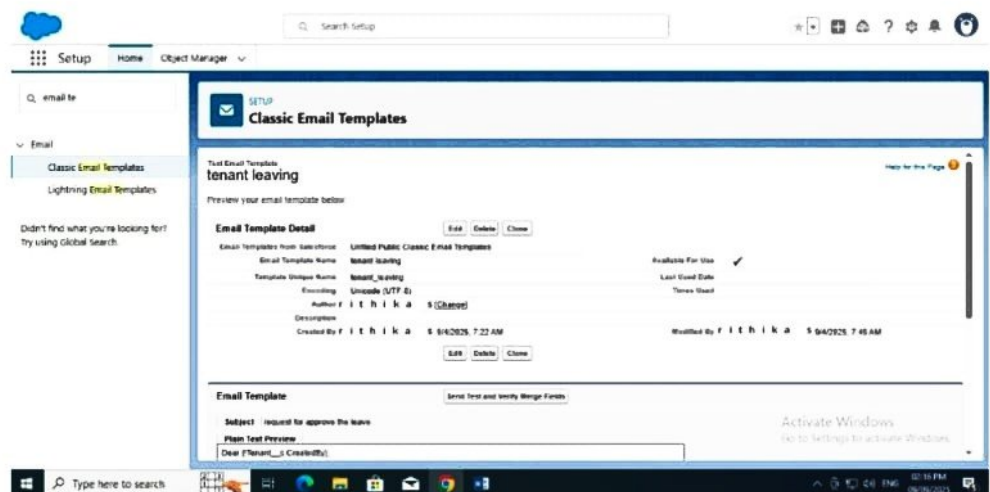
```

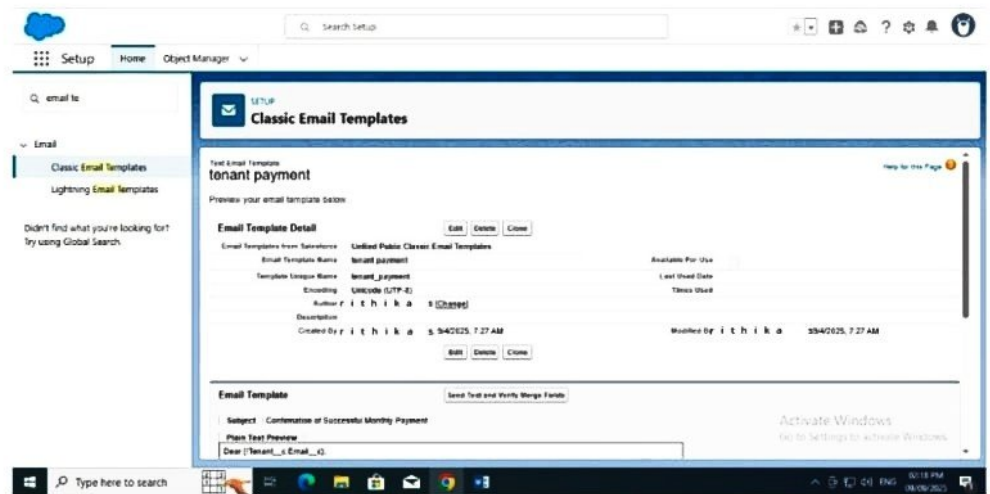
1 // Global class MonthlyEmailScheduler implements Scheduler {
2
3 // Global void execute(ScheduleContext sc) {
4
5     // Get current day = Date.today().day();
6
7     // if (currentDay == 1) {
8         sendEmail(sc);
9     }
10 }
11
12 }
13
14
15
16 public static void sendMonthlyEmail() {
17     // List<Tenant> tenants = [SELECT Id, Email__c FROM Tenant__c];
18
19     for (Tenant__c tenant : tenants) {
20         String recipientEmail = tenant.Email__c;
21
22         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
23
24         String emailSubject = "Reminder: Monthly Rent Payment Due";
25
26         Messaging.SingleEmailMessage email = new Messaging.SingleEmailMessage();
27
28         email.setToAddresses(new String[]{recipientEmail});
29
30         email.setSubject(emailSubject);
31
32         email.setHtmlBody(emailContent);
33     }
34 }

```

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

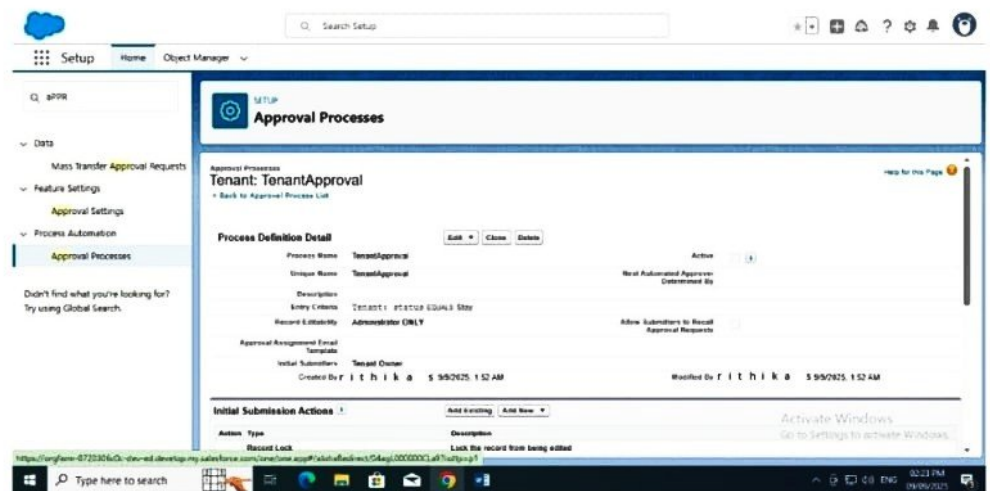




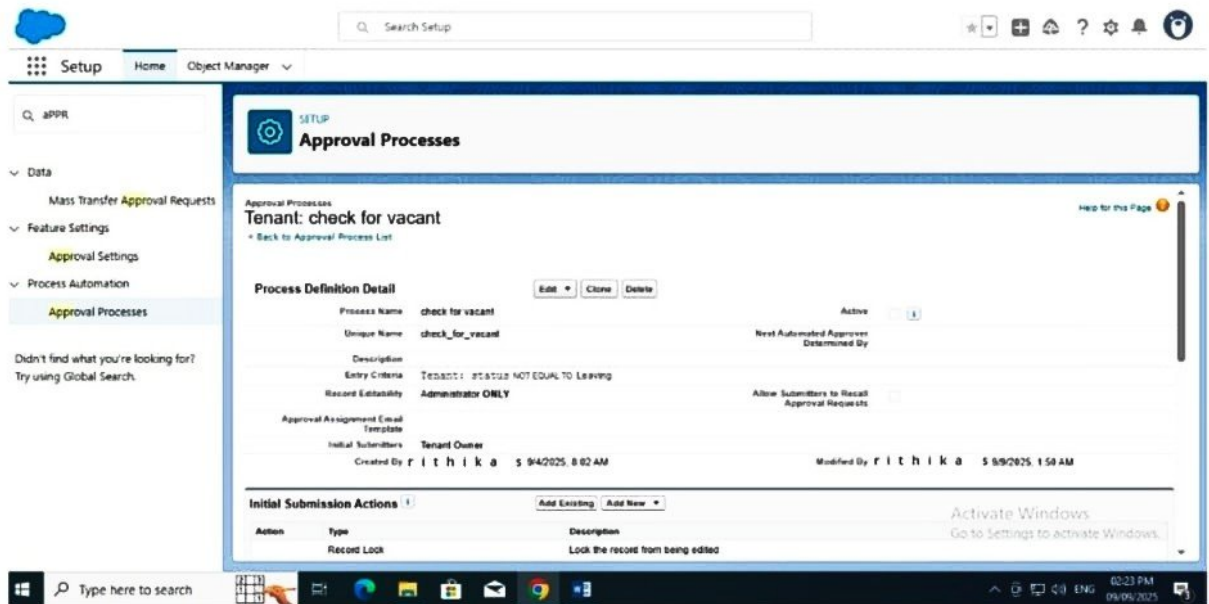


- Approval Process creation

For Tenant Leaving:

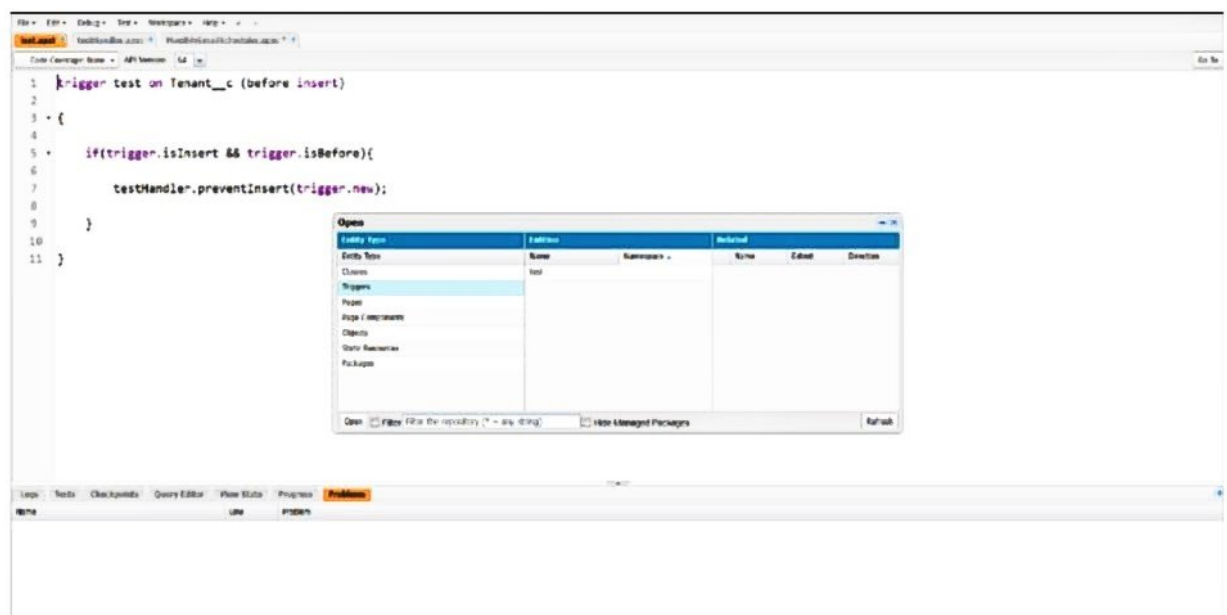


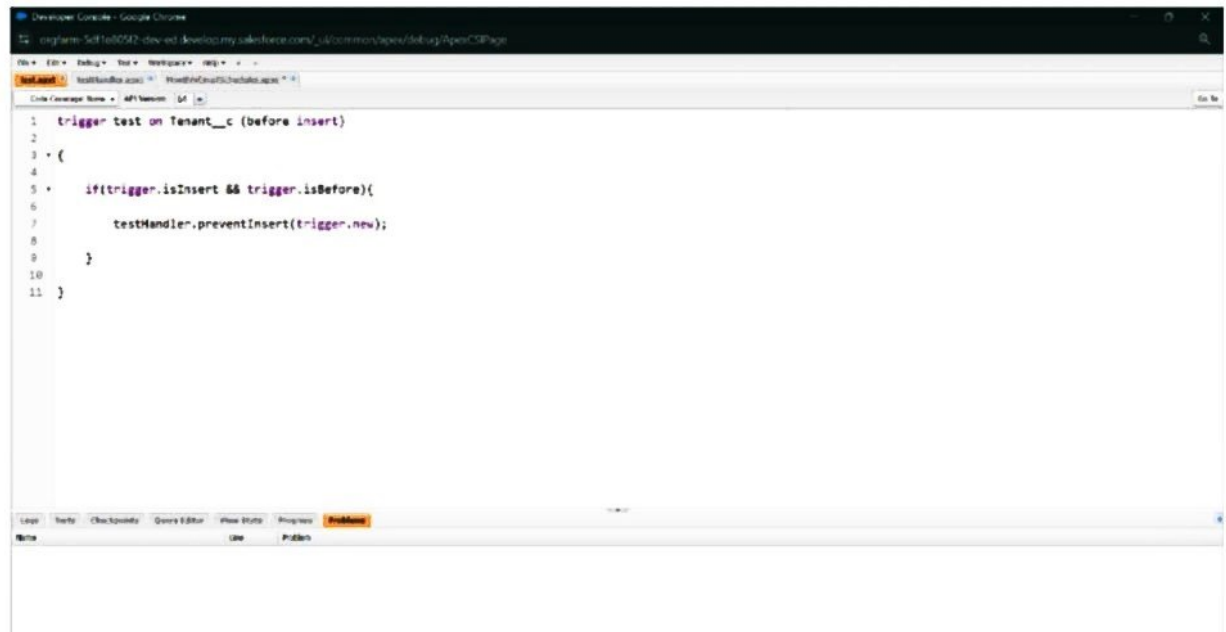
For Check for Vacant:



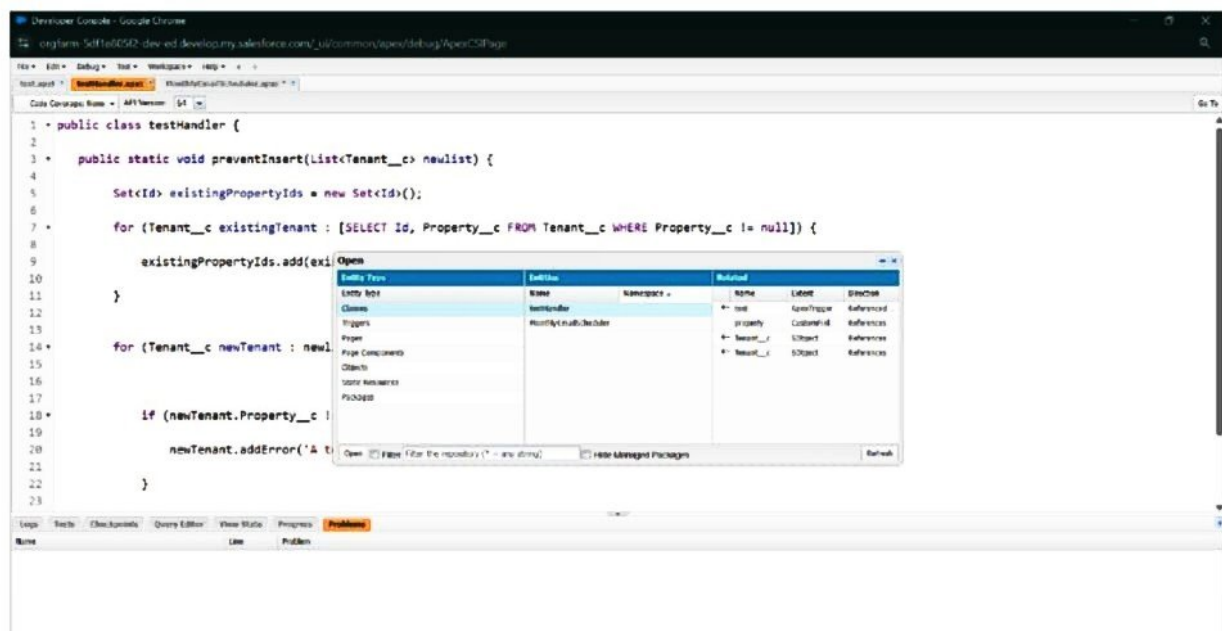
• Apex Trigger

Create an Apex Trigger



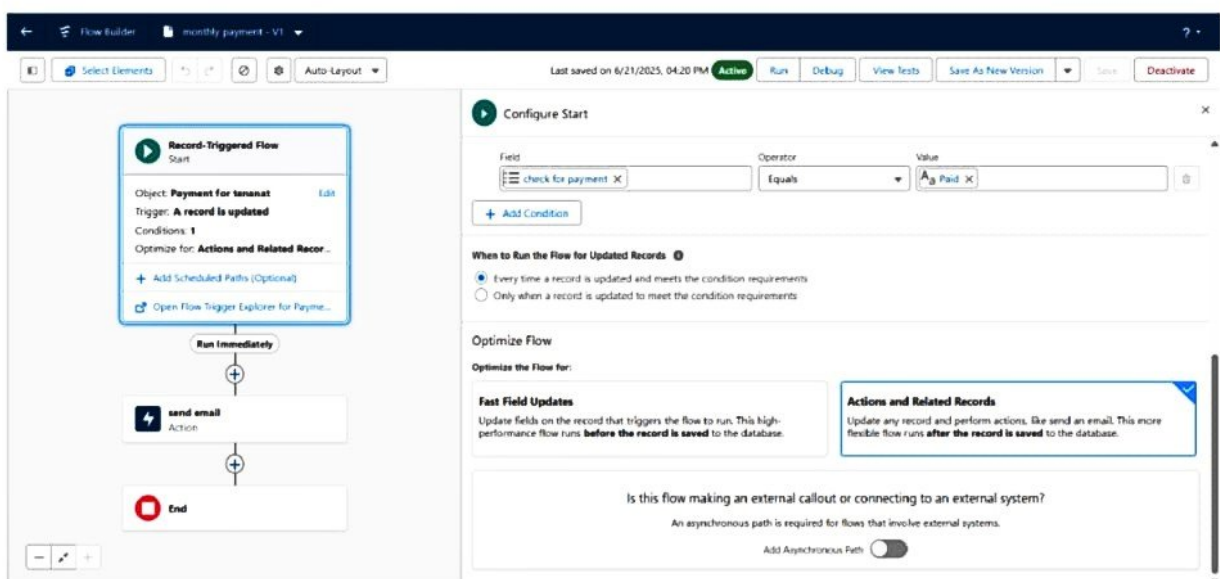


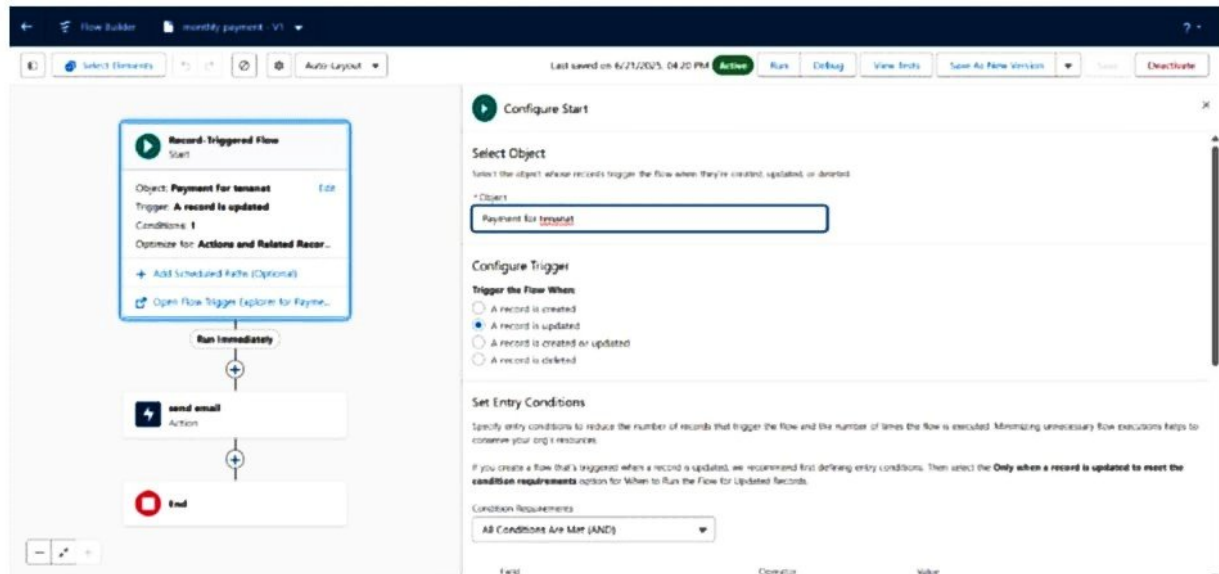
Create an Apex Handler class



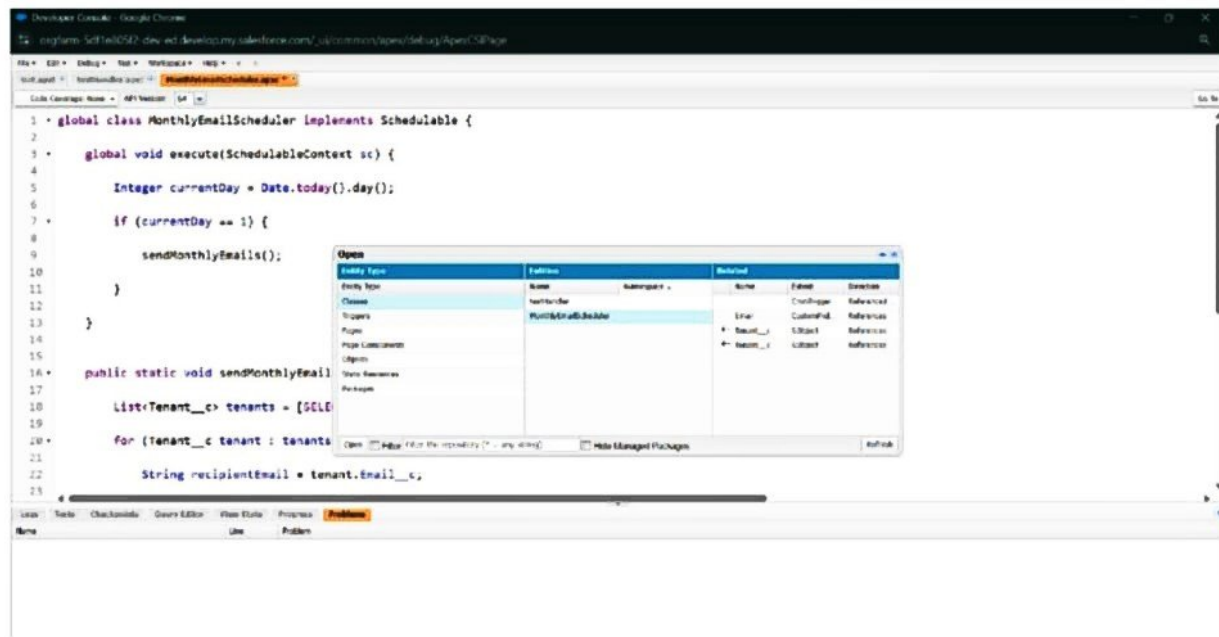
```
1 public class testHandler {
2
3     public static void preventInsert(List<Tenant__c> newList) {
4
5         Set<Id> existingPropertyIds = new Set<Id>();
6
7         for (Tenant__c existingTenant : [SELECT Id, Property__c FROM Tenant__c WHERE Property__c != null]) {
8
9             existingPropertyIds.add(existingTenant.Property__c);
10
11         }
12
13
14         for (Tenant__c newTenant : newList) {
15
16
17
18             if (newTenant.Property__c != null && existingPropertyIds.contains(newTenant.Property__c)) {
19
20                 newTenant.addError('A tenant can have only one property');
21
22             }
23
24         }
25
26     }
27 }
```

• FLOWS





- Schedule class:
Create an Apex Class



The screenshot shows a web browser window with the Salesforce Developer Console. The URL bar shows 'orgname:SelfHosted-dev-ed:developer.salesforce.com'. The console displays the following Apex code:

```
1 global class MonthlyEmailScheduler implements Schedulable {
2
3     global void execute(SchedulableContext sc) {
4         Integer currentDay = Date.today().day();
5
6         if (currentDay == 1) {
7             sendMonthlyEmail();
8         }
9     }
10
11     private static void sendMonthlyEmail() {
12         List<Email__c> emails = [SELECT id, Email__c FROM Email__c];
13
14         for (Email__c email : emails) {
15             String emailSubject = 'Monthly Email';
16             String emailContent = 'I trust this email finds you well. I am writing to remind you that the month is over. To due your time, current success the month functioning of our rental arrangement and helps maintain a positive living environment for all.';
17             Messaging.SingleMessageEmail msg = new Messaging.SingleMessageEmail();
18             msg.setSenderEmailAddress('your_email@example.com');
19             msg.setSubject(emailSubject);
20             msg.setContent(emailContent);
21             Messaging.sendEmail(msg);
22         }
23     }
24 }
```

Schedule Apex class

The screenshot shows the Salesforce Setup page for Apex Classes. The left sidebar contains a navigation menu with the following items:

- Setup
- Home
- Object Manager
- apex
- Email
 - Apex Exception Email
- Custom Code
 - Apex Classes
 - Apex Settings
 - Apex Test Execution
 - Apex Test History
 - Apex Triggers
- Environments
 - Jobs
 - Apex Flex Queue
 - Apex Jobs

The main content area shows the details for the Apex Class **MonthlyEmailScheduler**. The class is in the **Apex Class** namespace and is **Active**. The class body is as follows:

```
1 global class MonthlyEmailScheduler implements Schedulable {
2
3     global void execute(SchedulableContext sc) {
4         Integer currentDay = Date.today().day();
5
6         if (currentDay == 1) {
7             sendMonthlyEmail();
8         }
9     }
10
11     private static void sendMonthlyEmail() {
12         List<Email__c> emails = [SELECT id, Email__c FROM Email__c];
13
14         for (Email__c email : emails) {
15             String emailSubject = 'Monthly Email';
16             String emailContent = 'I trust this email finds you well. I am writing to remind you that the month is over. To due your time, current success the month functioning of our rental arrangement and helps maintain a positive living environment for all.';
17             Messaging.SingleMessageEmail msg = new Messaging.SingleMessageEmail();
18             msg.setSenderEmailAddress('your_email@example.com');
19             msg.setSubject(emailSubject);
20             msg.setContent(emailContent);
21             Messaging.sendEmail(msg);
22         }
23     }
24 }
```

Lease Management Home Properties **Tenants** lease Payment

Search...

Tenant

New Contact New Opportunity New Lead

Always believe that something

Related Details

Tenant Name	rithu	Owner	rithika s
Phone	(902) 554-0321		
Status	Stay		
Email	rithusara123@gmail.com		
Property	Hyd		
Created By	rithika s	Last Modified By	rithika s
	9/4/2025, 8:48 AM		9/8/2025, 4:45 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.

Activate Windows
Go to Settings to activate Windows.

Type here to search

02:28 PM 09/09/2025

Lease Management Home Properties **Tenants** lease Payment

Search...

Tenant

Tenant "meenu" was created.

New Contact New Opportunity New Lead

Related Details

Tenant Name	rithu	Owner	rithika s
Phone	(123) 654-7890		
Status	Leaving		
Email	rithusara123@gmail.com		
Property	Imran		
Created By	rithika s	Last Modified By	rithika s
	9/9/2025, 2:01 AM		9/9/2025, 2:01 AM

Activity

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No activities to show.

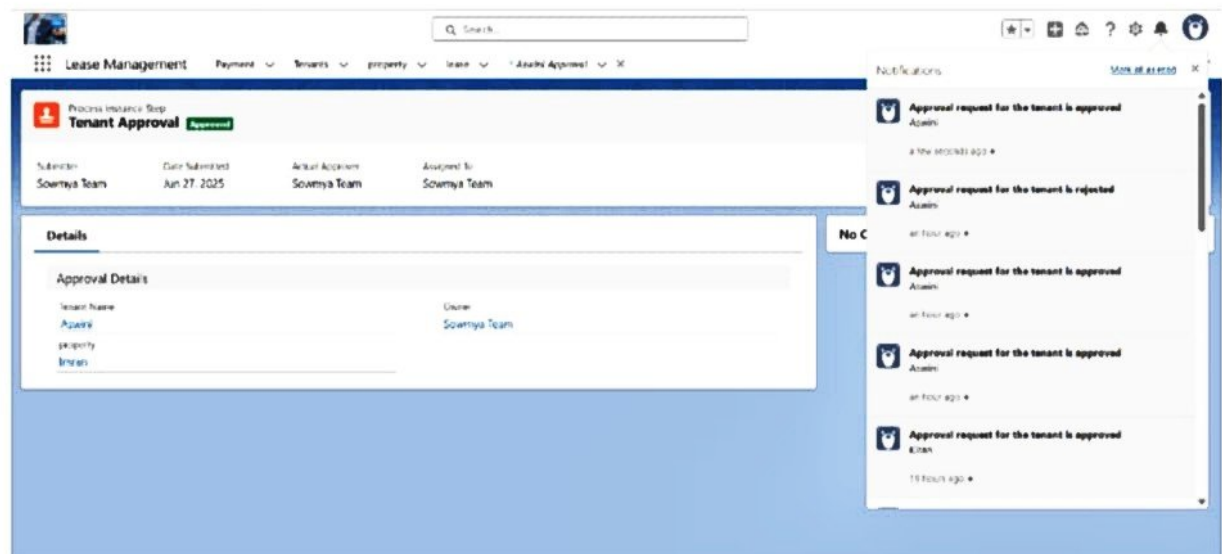
Get started by sending an email, scheduling a task, and more.

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

Activate Windows
Go to Settings to activate Windows.

Type here to search

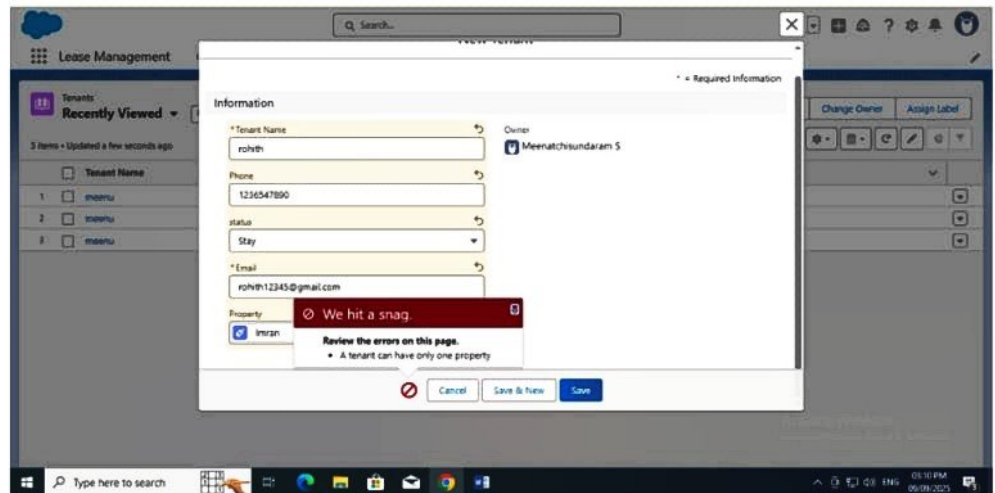
02:31 PM 09/09/2025



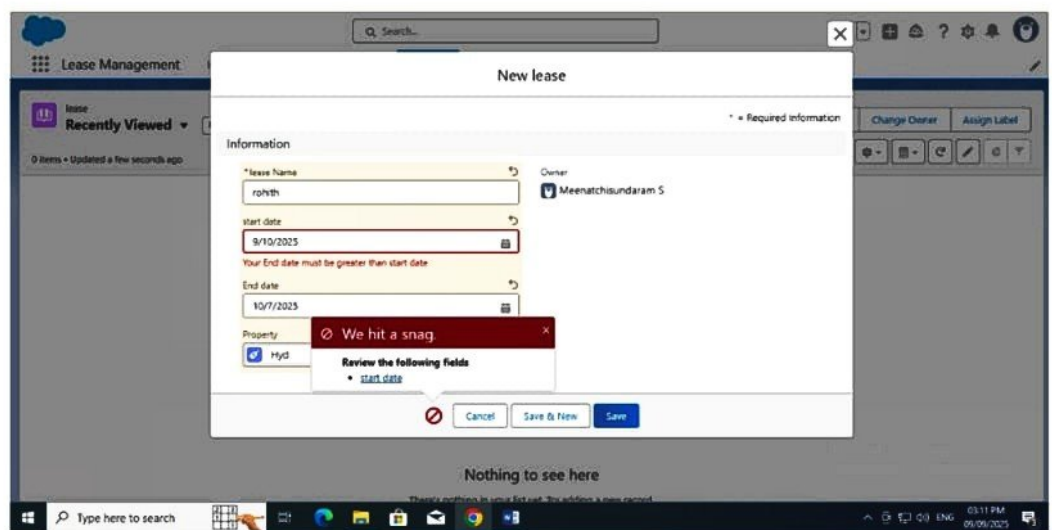
FUNCTIONAL AND PERFORMANCE TESTING

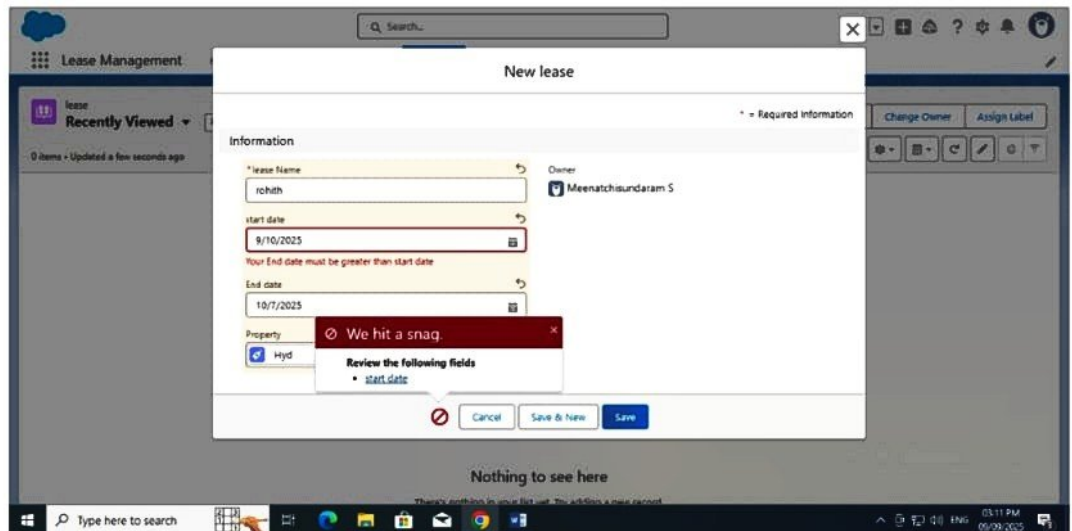
Performance Testing

- Trigger validation by entering duplicate tenant-property records

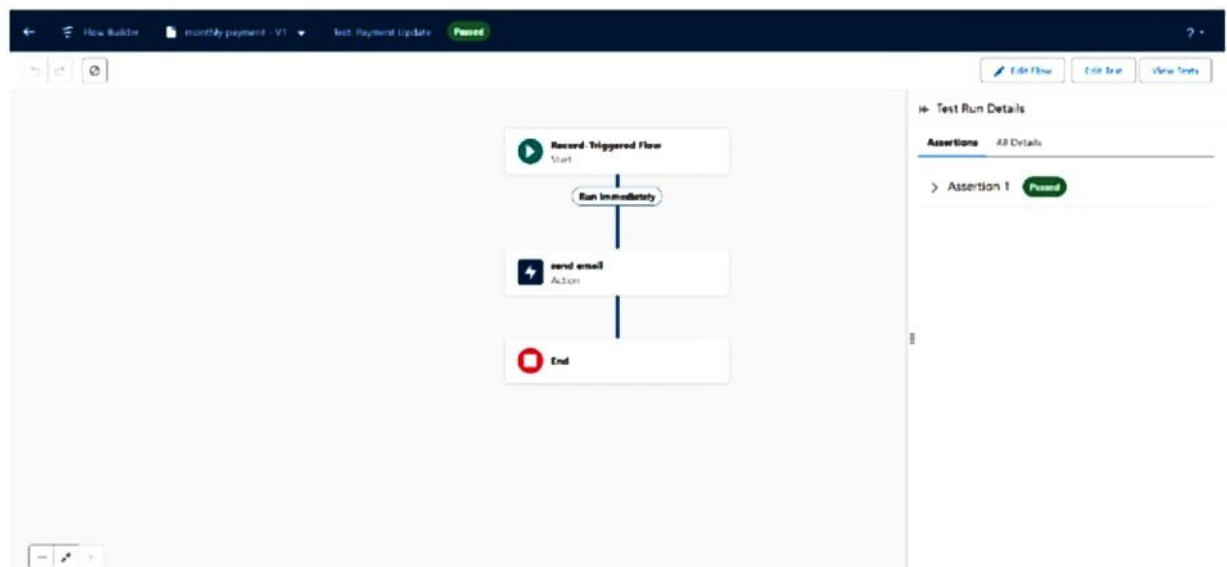


- Validation Rule checking





- Test flows on payment update



- Approval process validated through email alerts and status updates

Lease Management

Payment

Tenants

property

lease

niranjan Approval

Search...

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+

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?

⚙️

🔔

👤

Tenant

niranjan

Related

Details

* Required Information

* Tenant Name

niranjan

Owner

Sowmya Team

* Email

niranjan106@gmail.com

Phone

Status

Stay

Property

Parkside Lofts

Created By

Sowmya Team, 6/23/2023, 2:53 AM

Last Modified By

Sowmya Team, 6/23/2023, 3:58 AM

Cancel

Save

Notifications

Mark all as read

Approval request for the tenant is approved

niranjan

a few seconds ago

Approval request for the tenant is rejected

niranjan

Jun 23, 2023, 4:29 PM

Approval request for the tenant is approved

niranjan

Jun 23, 2023, 4:25 PM

Approval request for the tenant is approved

niranjan

Jun 23, 2023, 4:14 PM

New Guidance Center learning resource available

Deliver Your Sales Process

Learn how to guide reps through the sales process.

Jun 20, 2023, 1:29 PM

Lease Management

Payment

Tenants

property

lease

Search...

☆

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⚙️

🔔

👤

Tenant

niranjan

New Contact

Edit

New Opportunity

Approval History (6+)

Step Name	Date	Status	Assigned To
Step 1	6/23/2023, 3:39 AM	Approved	Sowmya Team
Approval Request Submitted	6/23/2023, 3:39 AM	Submitted	Sowmya Team
Step 1	6/23/2023, 3:39 AM	Rejected	Sowmya Team
Approval Request Submitted	6/23/2023, 3:58 AM	Submitted	Sowmya Team
Step 1	6/23/2023, 3:53 AM	Approved	Sowmya Team
Approval Request Submitted	6/23/2023, 3:53 AM	Submitted	Sowmya Team

View All

Payment (2)

New

Payment Name
Leak
Rahul

View All

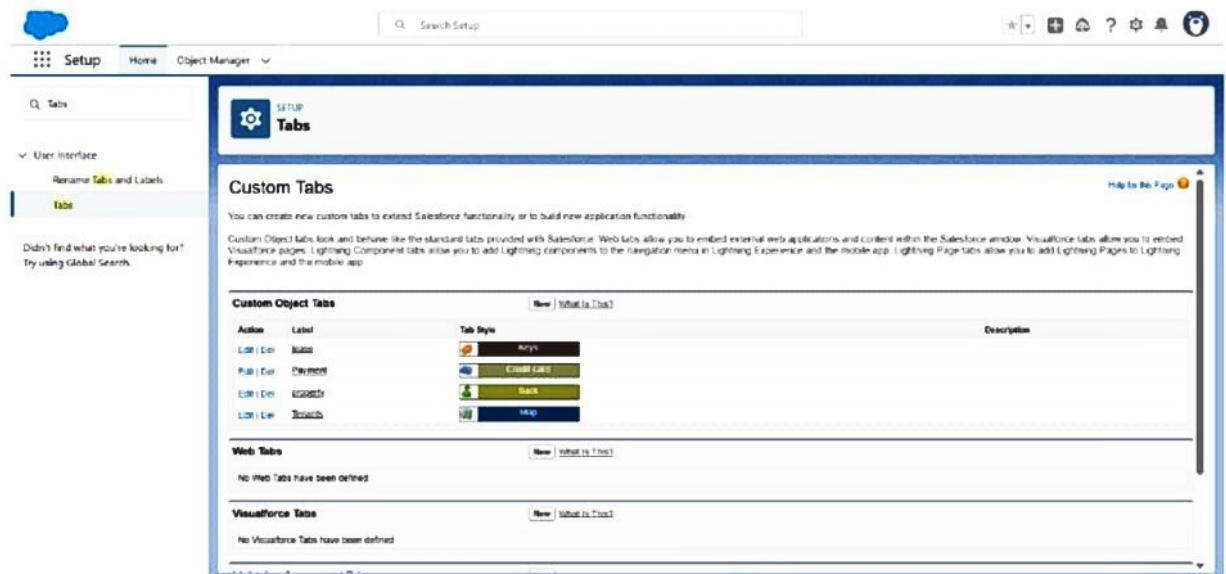
Get started by sending an email, scheduling a task, and more.

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

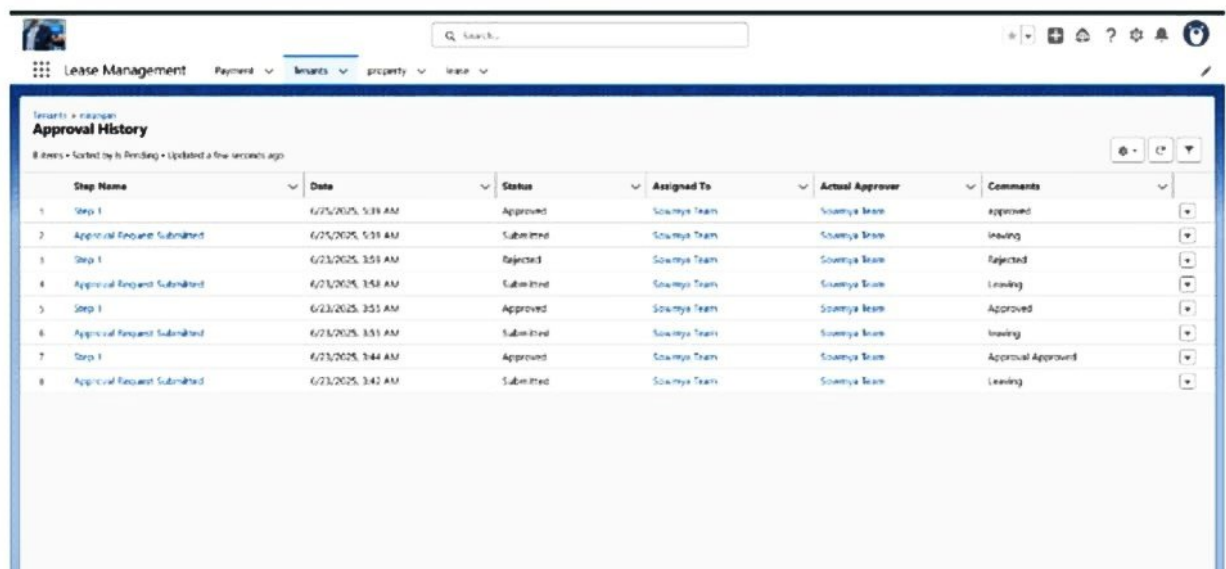
RESULTS

Output Screenshots

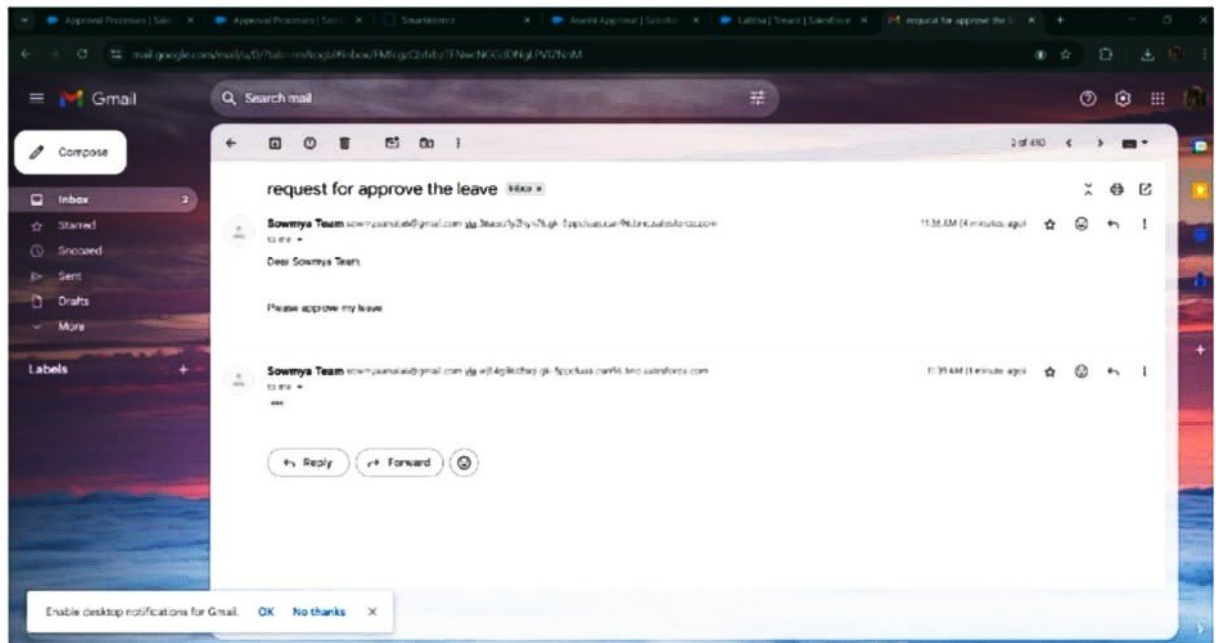
- Tabs for Property, Tenant, Lease, Payment



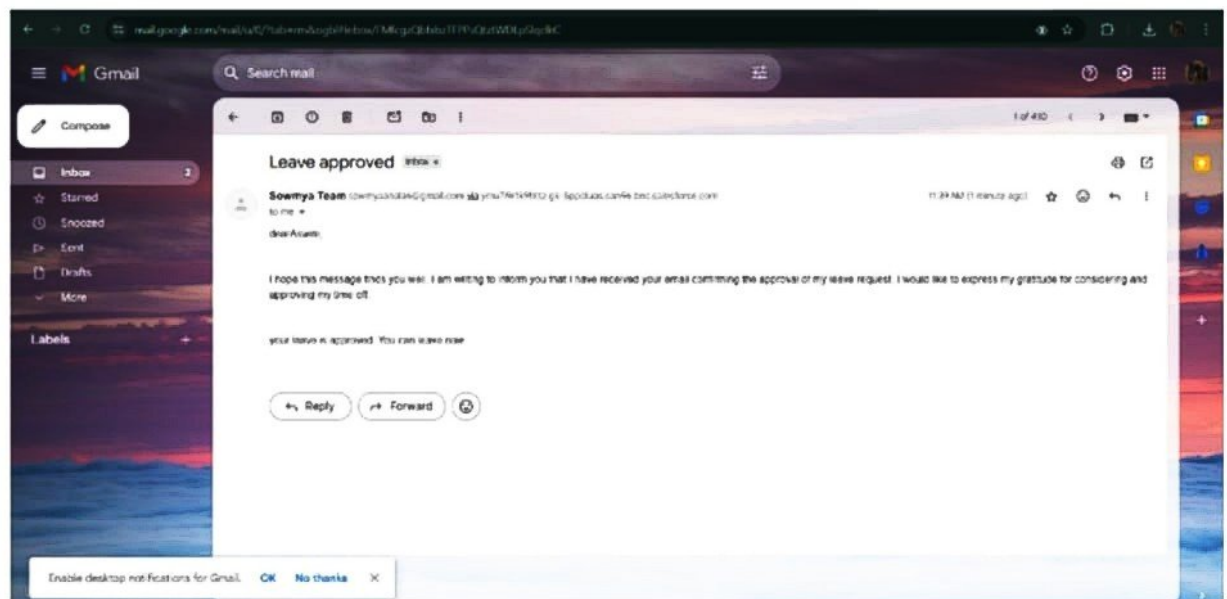
- Email alerts



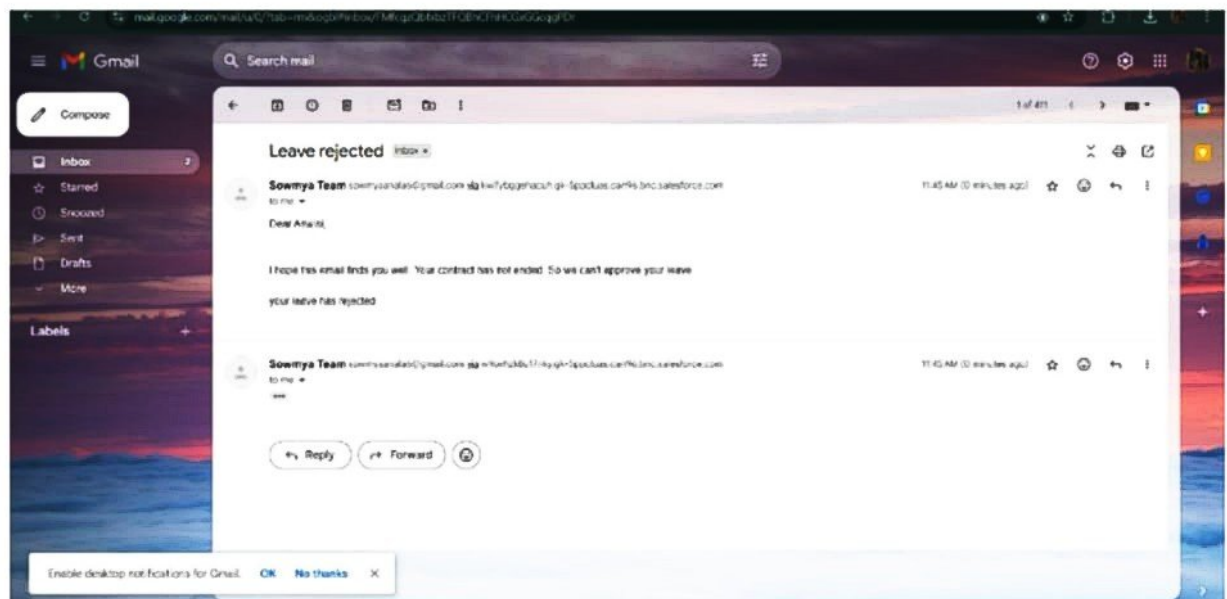
- Request for approve the leave



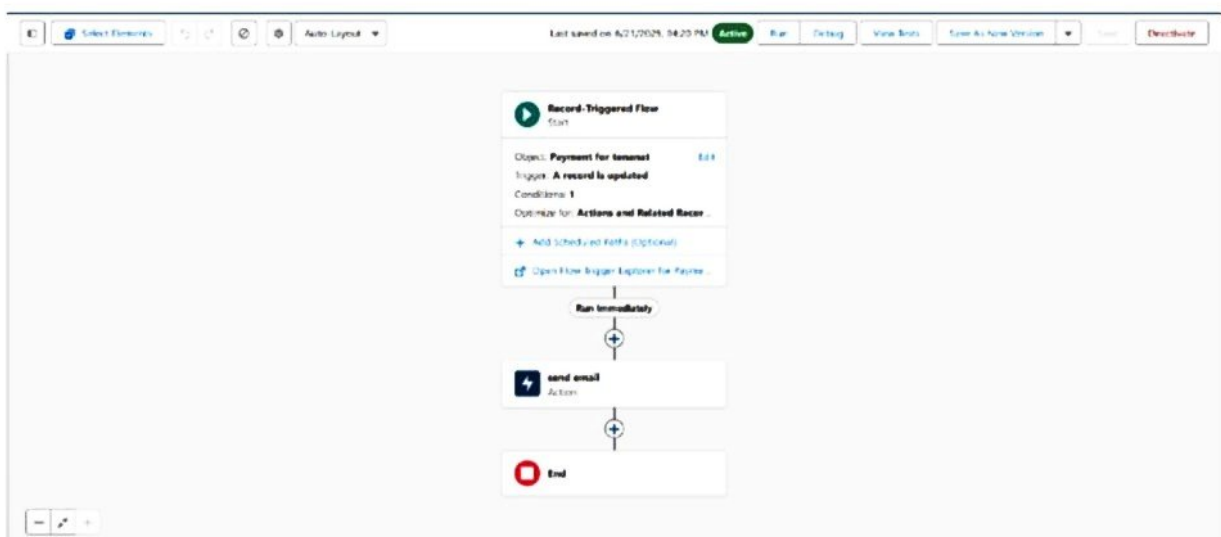
- Leave approved



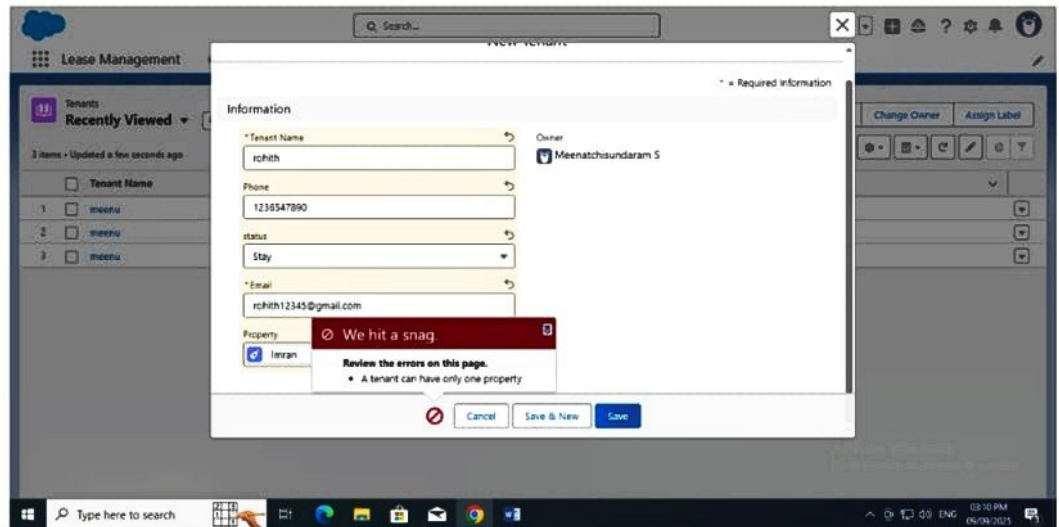
- Leave rejected



- Flow runs



- Trigger error messages



- Approval process notifications



ADVANTAGES & DISADVANTAGES

CONCLUSION

The Lease Management System successfully streamlines the operations of leasing through a structured, automated Salesforce application. It improves efficiency, communication, and data accuracy for both admins and tenants.

APPENDIX

● Source Code: Provided in Apex Classes and Triggers

Test.apxt: 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});
```

```
    }
```

```
}
```

```
}
```