

LEASE MANAGEMENT

COLLEGE NAME: AVP COLLEGE OF ARTS AND SCIENCE

College Code: bruaj

TEAM ID: NM2025TMID25423

TEAM MEMBERS:

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Email:srinivisudhagar@gmail.com

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.



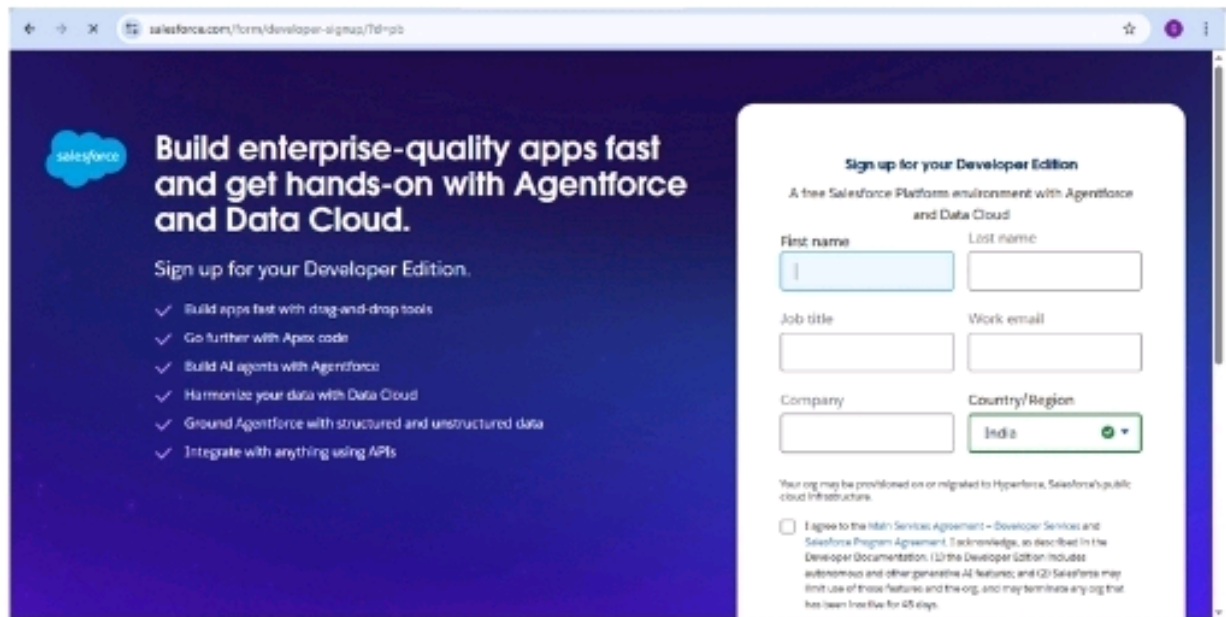
1.2 Purpose

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

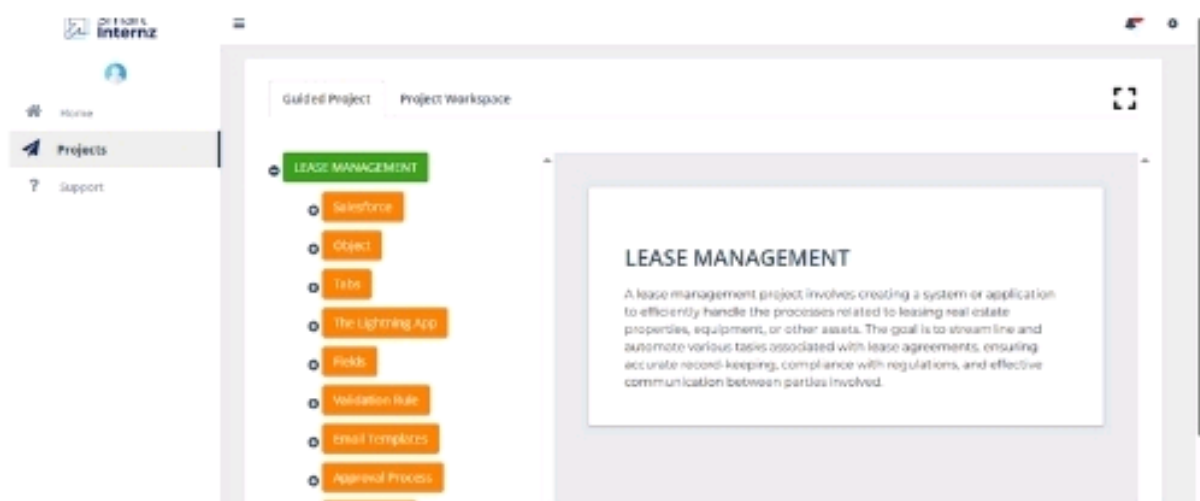
Creating Developer Account:

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



The screenshot shows the Salesforce Developer Edition sign-up page. On the left, there's a blue background with the Salesforce logo and the 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". On the right, there's a white form titled "Sign up for your Developer Edition" with the subtitle "A free Salesforce Platform environment with Agentforce and Data Cloud." The form includes fields for "First name", "Last name", "Job title", "Work email", "Company", and "Country/Region" (with a dropdown menu showing "India"). Below the form, there's a checkbox for "I agree to the Salesforce Terms of Service" and a note about the org being provisioned on or migrated to Hyperforce.

- Created objects: Property, Tenant, Lease, Payment



n/mail/u/0/#inbox/FMfcgzQcpdjrwKdfhZNKrSfLKGnLGqkC

🔍 Search mail

②

1 of 64

Welcome to Salesforce: Reset your password INFO X



support@salesforce.com <support@salesforce.com>
to me ▾

10:12 PM (0 minutes ago)



Welcome to your Developer Edition

Hi gayathri,

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](#)

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

List View Button Layout

Restriction Rules

Sharing 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

Edit Delete

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

Details

Description

API Name
lease__c

Custom
✓

Singular Label
lease

Plural Label
leases

Enable Reports
✓

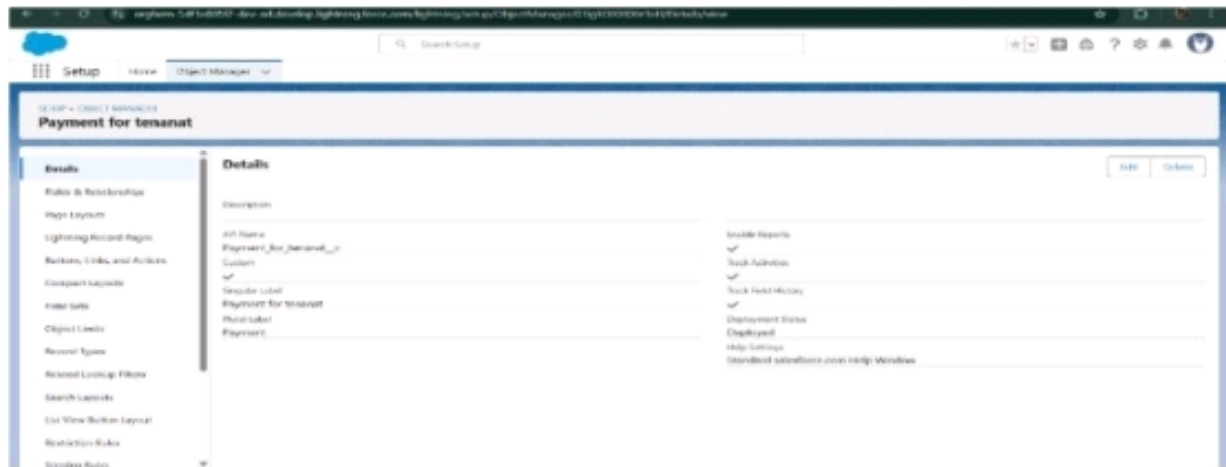
Track Activities
✓

Track Field History
✓

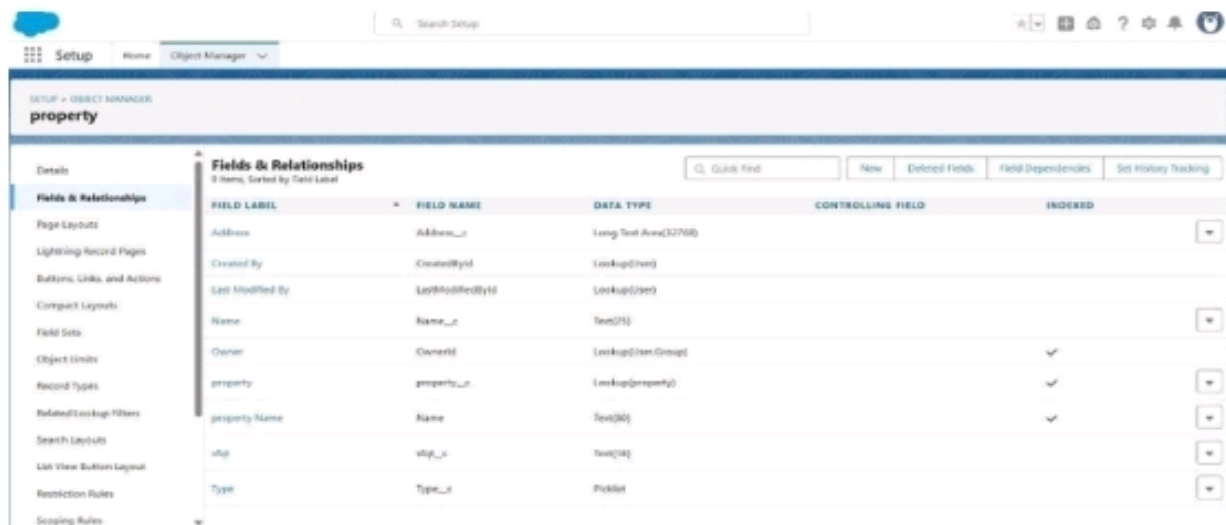
Deployment Status
Deployed

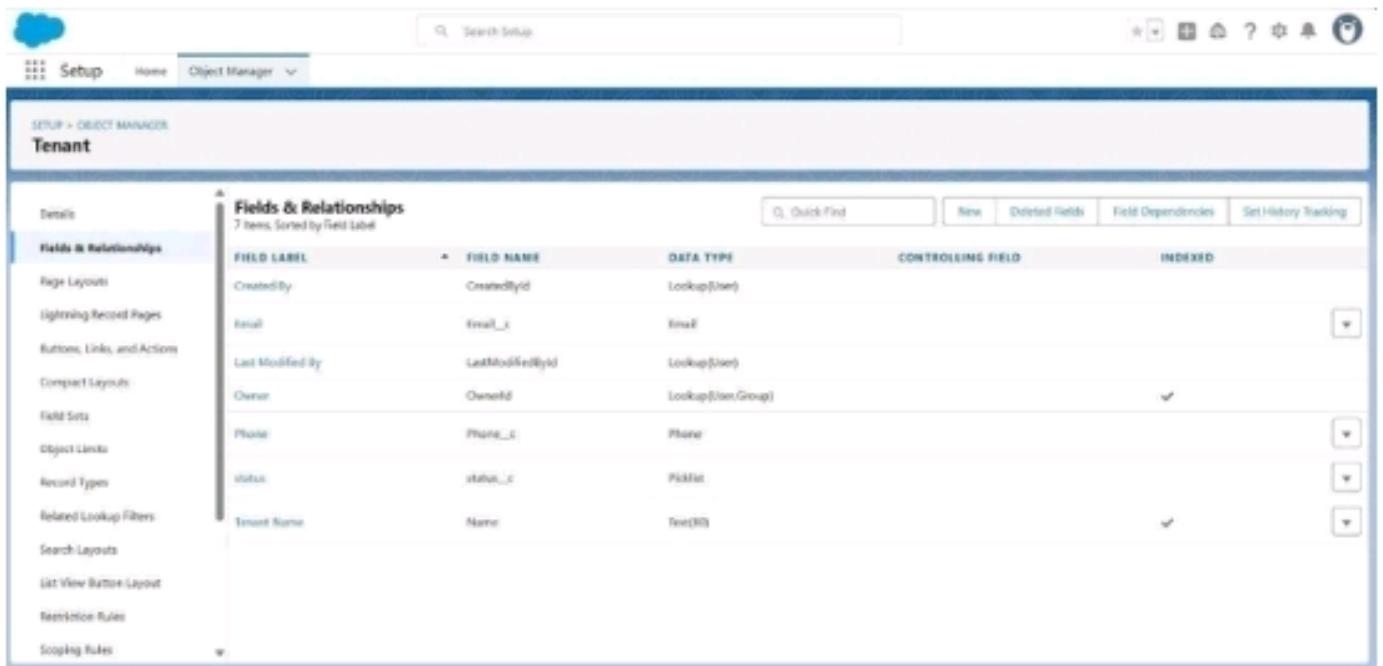
Help Settings
Standard salesforce.com Help Window

Edit Delete

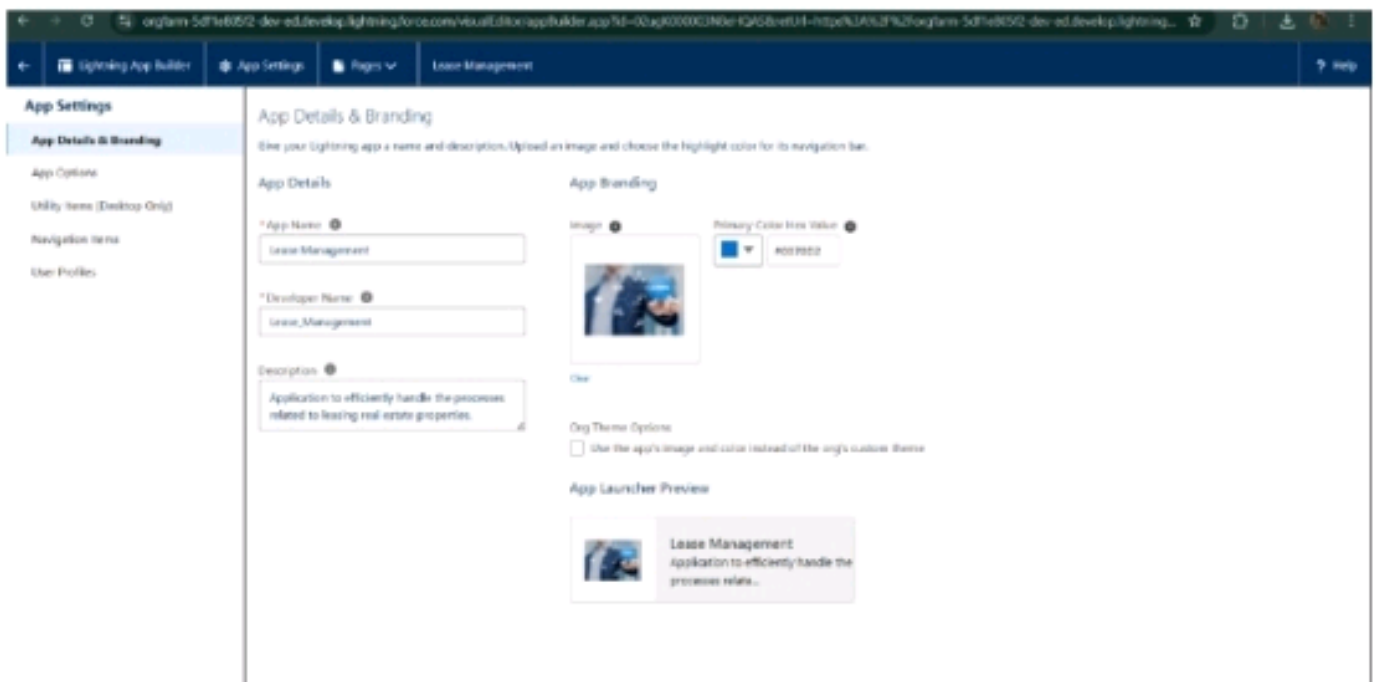


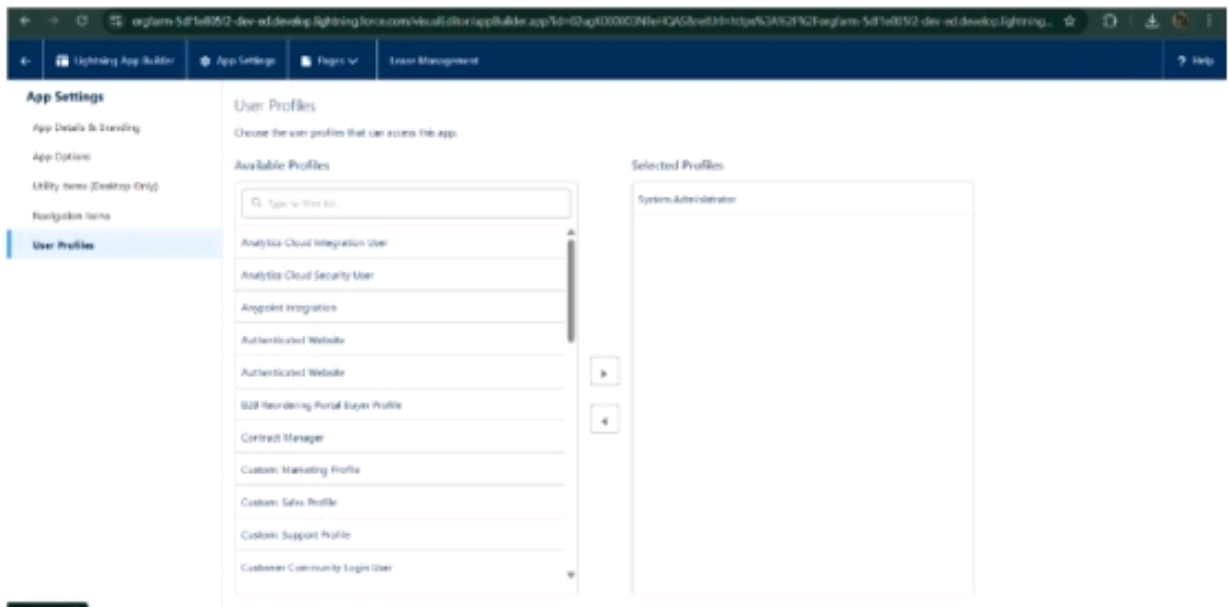
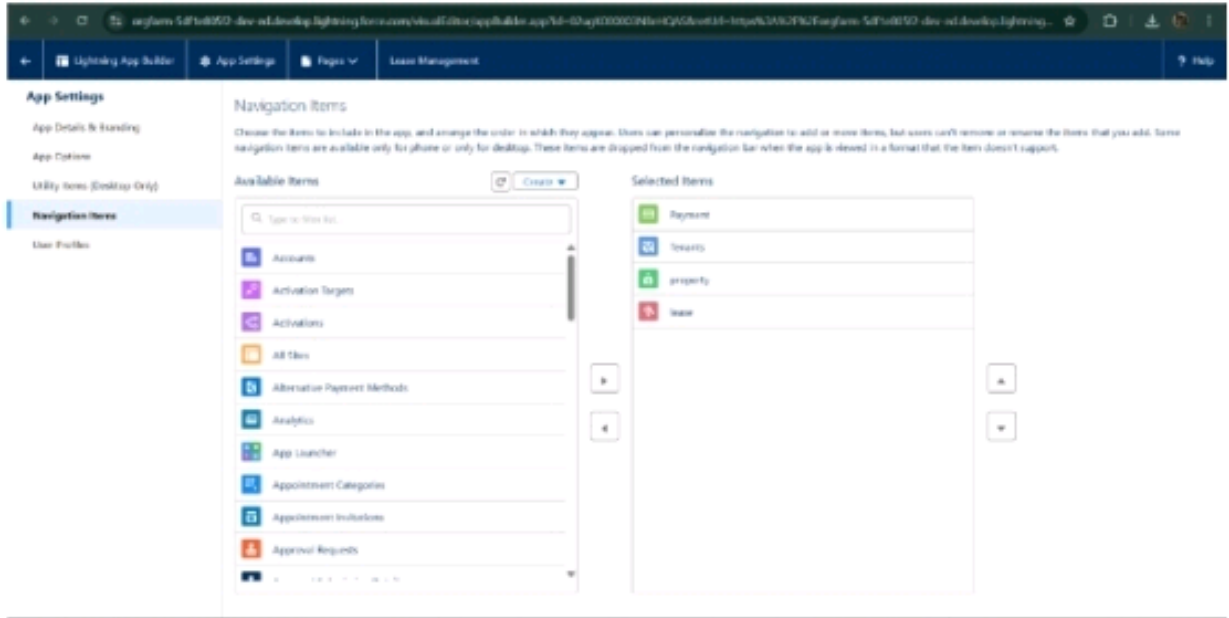
- Configured fields and relationships

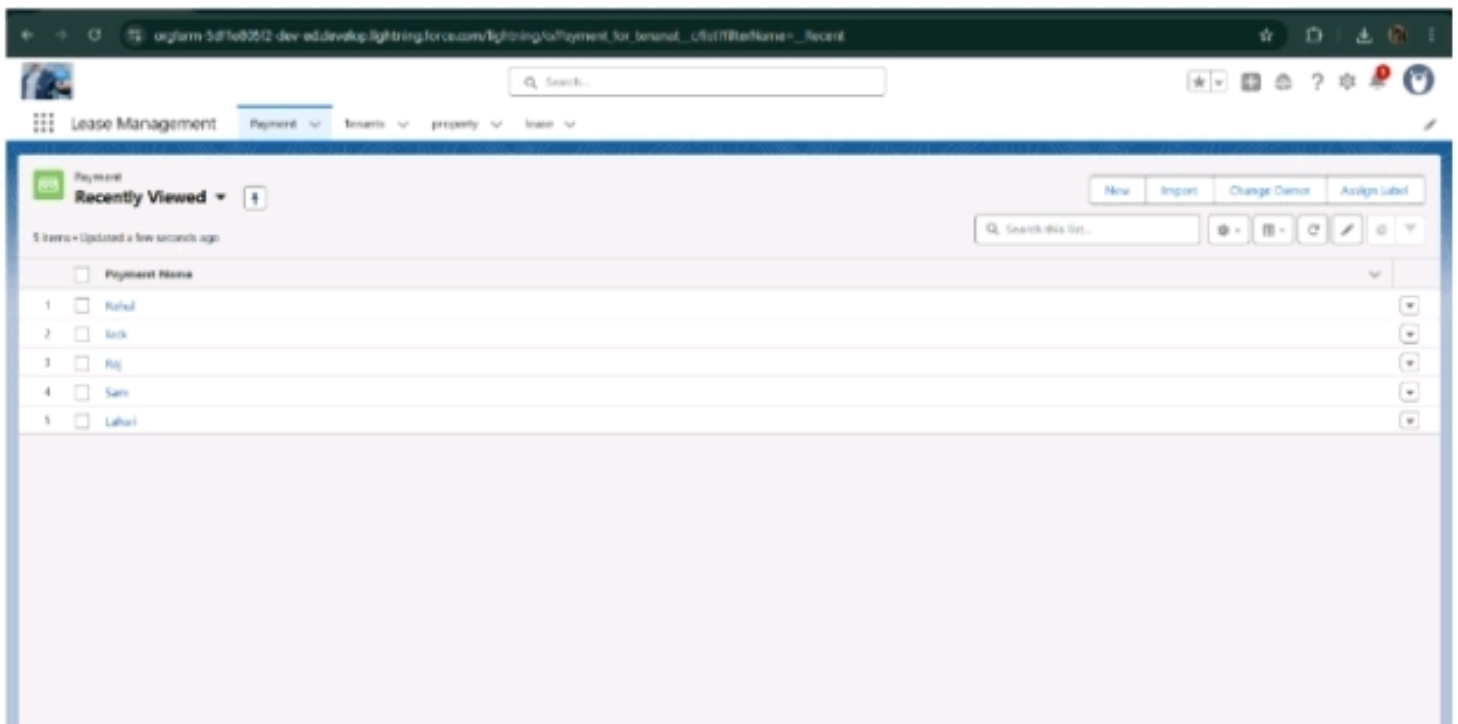




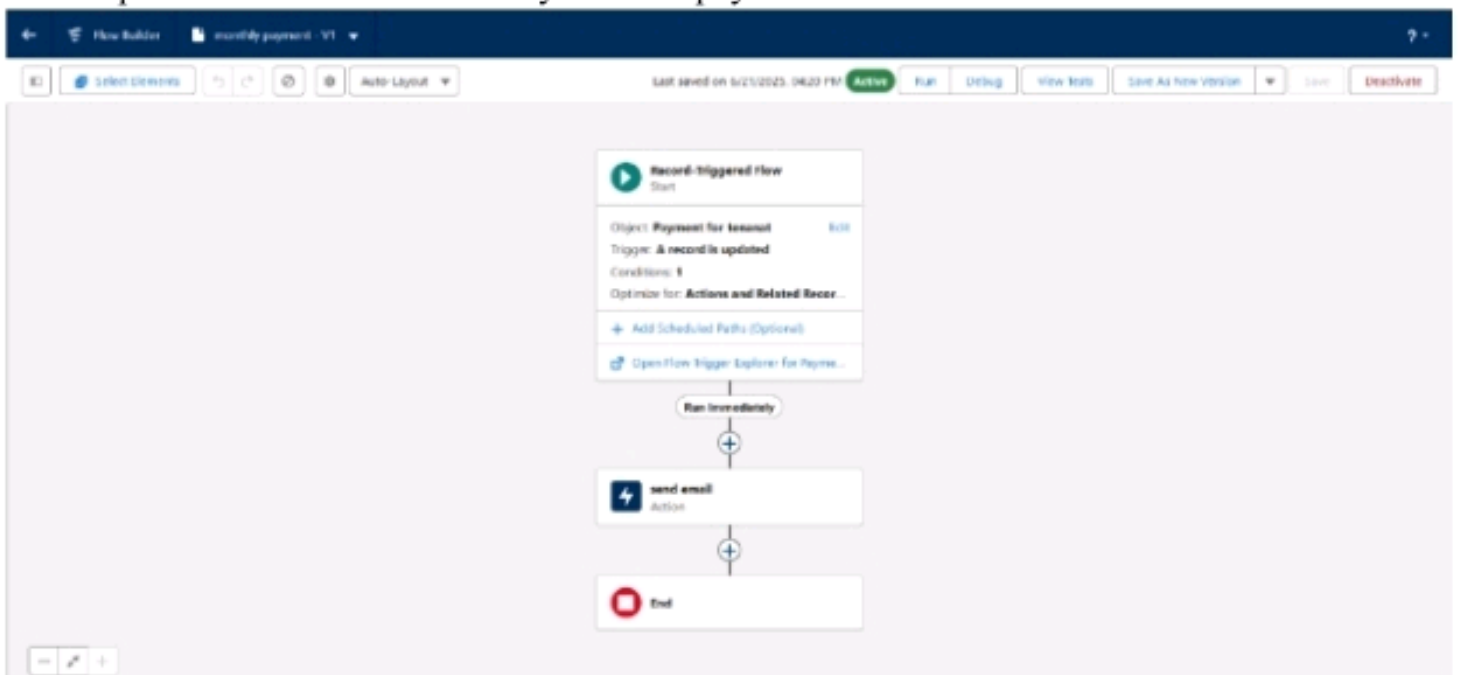
- Developed Lightning App with relevant tabs



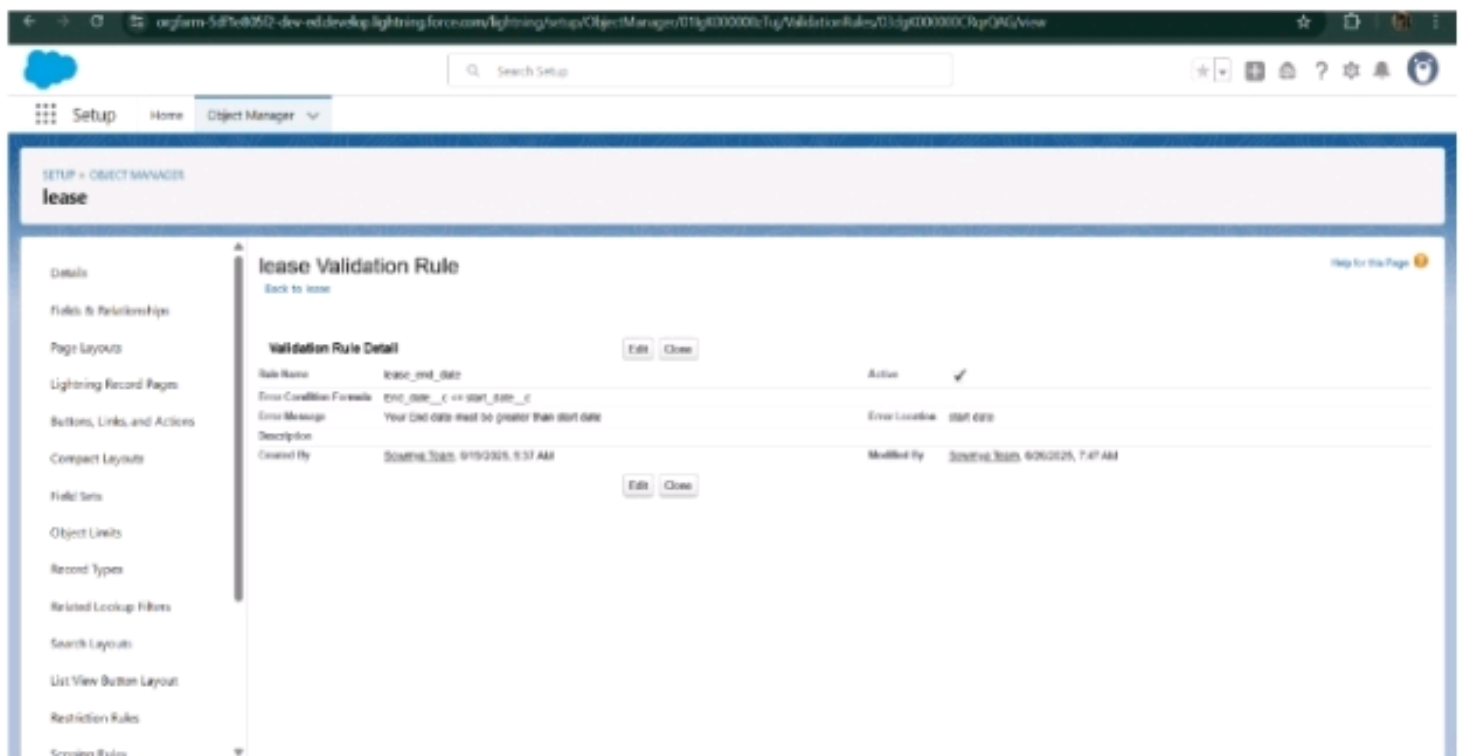
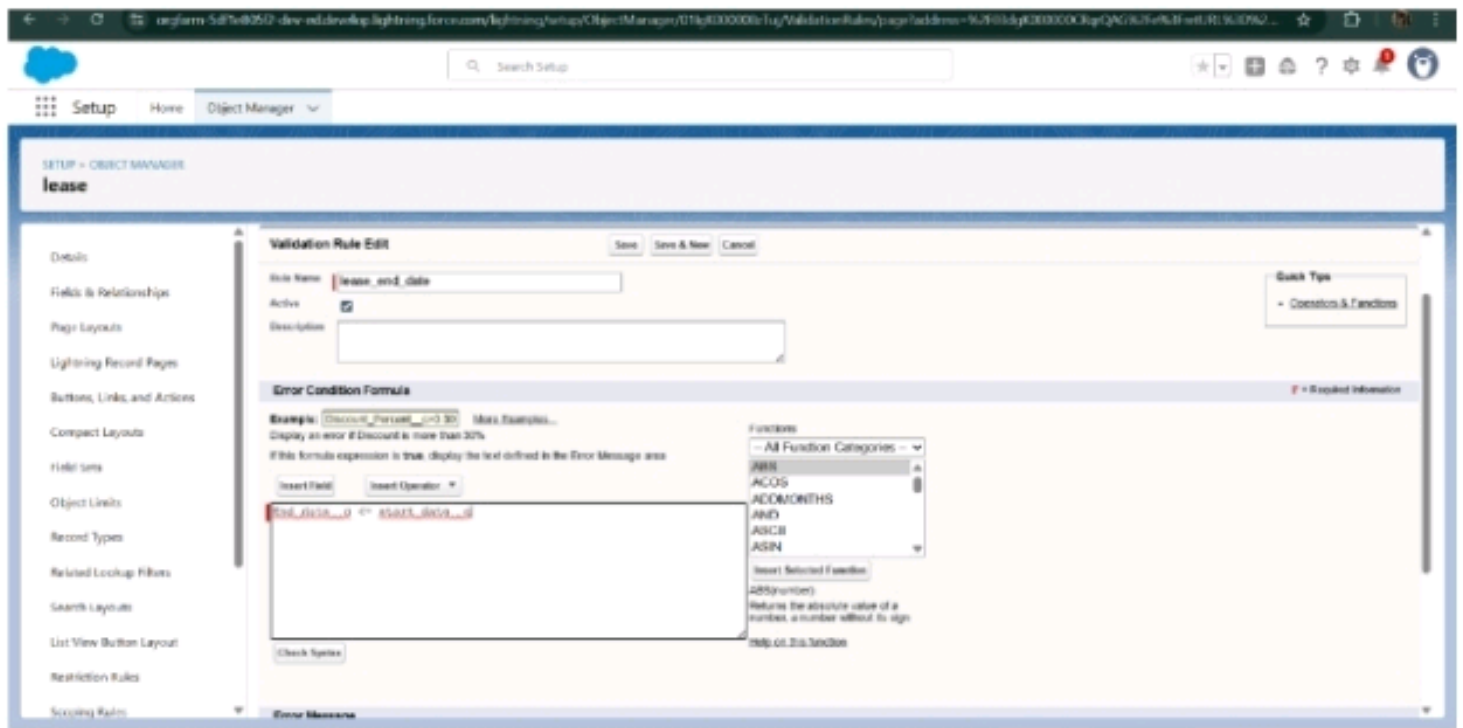




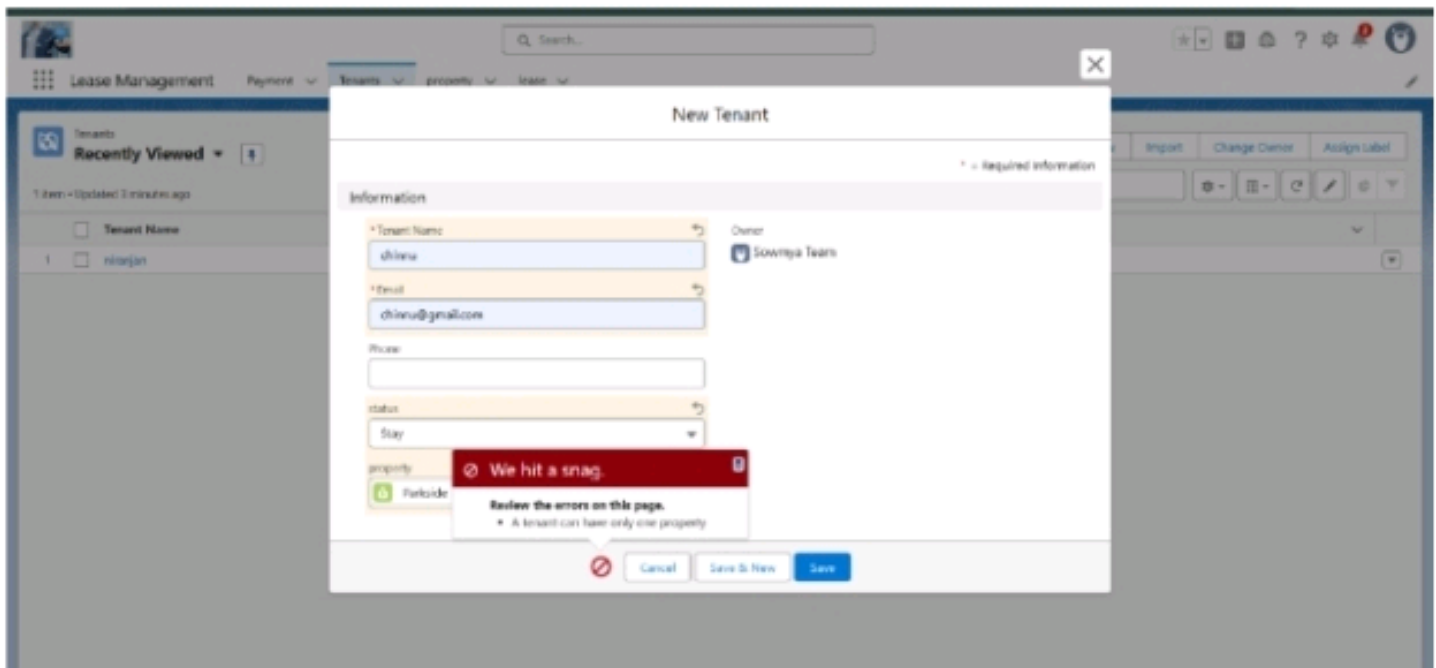
- Implemented Flows for monthly rent and payment success



- To create a validation rule to a Lease Object



- Added Apex trigger to restrict multiple tenants per property



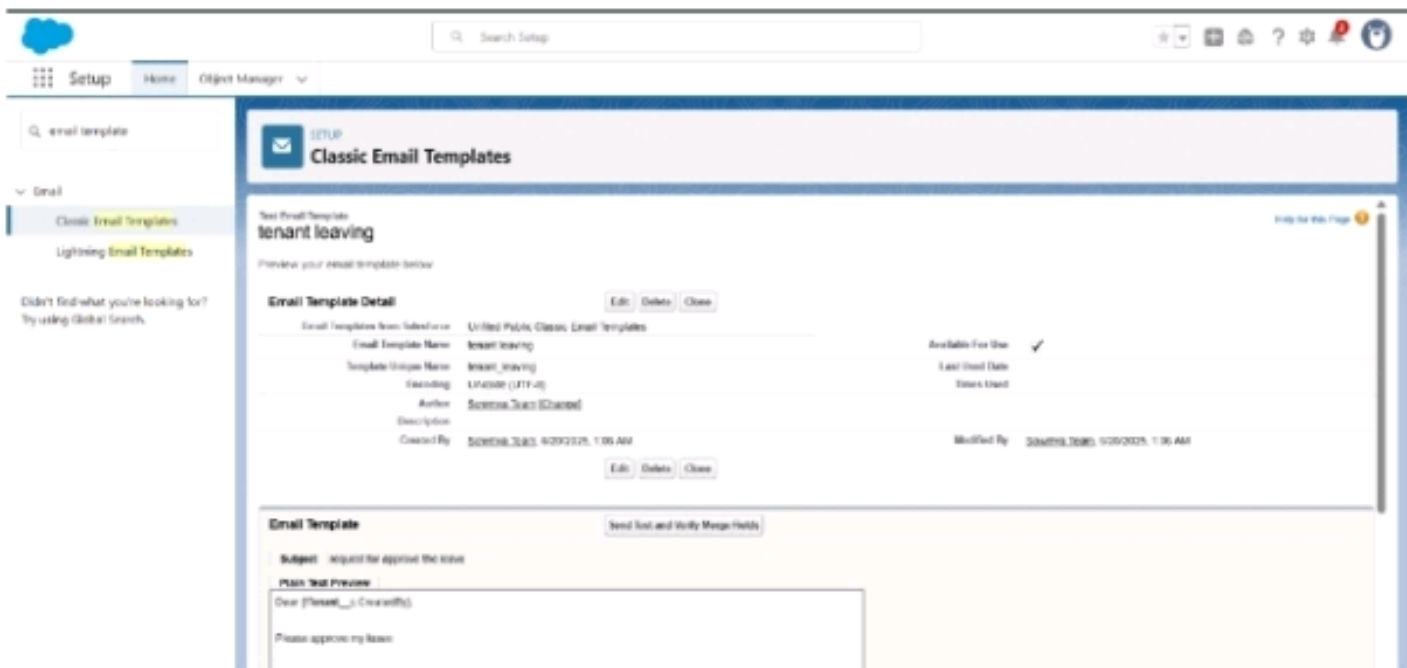
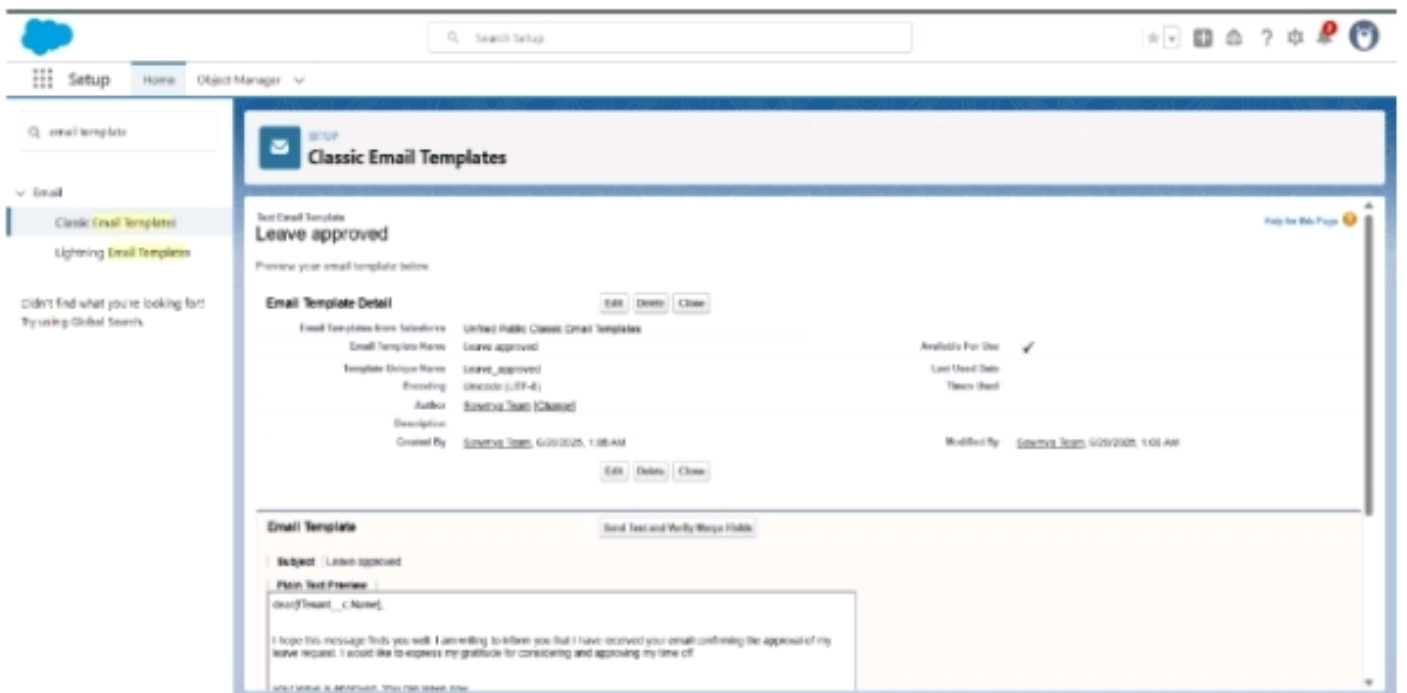
- Scheduled monthly reminder emails using Apex class


```

1 // global class NorthbayScheduler implements Schedulable {
2
3 // global void execute(SchedulableContext sc) {
4
5 //     Integer currentDay = Data.today().day();
6
7 //     if (currentDay == 1) {
8 //
9 //         sendNorthbayEmails();
10 //     }
11 // }
12
13 // public static void sendNorthbayEmails() {
14 //
15 //     List<Tenant__c> tenants = [SELECT Id, Email__c FROM Tenant__c];
16 //
17 //     for (Tenant__c tenant : tenants) {
18 //
19 //         String recipientEmail = tenant.Email__c;
20 //
21 //         String emailContent = 'I trust this email finds you well. I am writing to remind you that the monthly rent on the Your timely payment ensures the smooth functioning of our rental arrangement and helps maintain a
22 //
23 //         String emailSubject = 'Reminder: Monthly Rent Payment Due';
24 //
25 //         Messaging.SingleEmailMessage email = new Messaging.SingleEmailMessage();
26 //
27 //         email.setToAddresses(new String[]{recipientEmail});
28 //
29 //         email.setSubject(emailSubject);
30 //
31 //         email.setPlainTextBody(emailContent);
32 //     }
33 // }








```

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





Search Setup




SetupHomeObject Manager

email template

Email

- Classic Email Templates
- Lightning Email Templates

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

 SETUP

Classic Email Templates

Test Email Template

Leave rejected

Help for this Page

Preview your email template below.

Email Template Detail

Email Template Name: Leave rejected

Template Unique Name: Leave_rejected

Encoding: Unicode (UTF-8)

Author: Salesforce Search Channel

Description: Created By: Salesforce, S&S: 9/29/2025, 1:11 AM

Available For Use: ☒

Last Used Date: Never Used

Modified By: Salesforce, S&S: 9/29/2025, 1:11 AM

Edit

Delete

Close

Email Template


Send Test and Merge Fields

Subject: Leave rejected








Plain Text Preview

Dear {Tenant__cName},

I hope this email finds you well. Your contract has not ended, so we can't approve your move.
Your move has rejected.



Search Setup




SetupHomeObject Manager

email template

Email

- Classic Email Templates
- Lightning Email Templates

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

 SETUP

Classic Email Templates

Test Email Template

Tenant Email

Help for this Page

Preview your email template below.

Email Template Detail

Email Template Name: Tenant Email

Template Unique Name: Tenant_Email

Encoding: Unicode (UTF-8)

Author: Salesforce Search Channel

Description: Created By: Salesforce, S&S: 9/29/2025, 1:12 AM

Available For Use: ☒

Last Used Date: Never Used

Modified By: Salesforce, S&S: 9/29/2025, 1:12 AM

Edit

Delete

Close

Email Template

Send Test and Merge Fields

Subject: Urgent: Monthly Rent Payment Reminder

Plain Text Preview

Dear {Tenant__cName},

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 legally sensitive document and should not be used, copied, altered or otherwise distributed, or relied on.

Setup Home Object Manager

Search Setup

email template

Email

Classic Email Templates

Lightning Email Templates

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

Classic Email Templates

Test Email Template

tenant payment

Preview your email template below.

Email Template Detail Edit Delete Close

Email Template from Salesforce	Unified Public Classic Email Templates	Available For Use	✓
Email Template Name	tenant payment	Last Used Date	
Template Unique Name	tenant_payment	Times Used	
Encoding	Unicode (UTF-8)		
Author	System Administrator		
Description			
Created By	System Administrator, 6/26/2025, 11:13 AM	Modified By	System Administrator, 6/26/2025, 11:13 AM

Edit Delete Close

Email Template Send Test and Notify Myself (Beta)

Subject: Confirmation of Successful Monthly Payment

Plain Text Preview

Dear {tenant__cEmail__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.

- Approval Process creation

For Tenant Leaving:

orgName-SfHed9512-dev-ed.develop.lightning.force.com/lightning/setup/ApprovalProcesses/page?address=-%2F04ag0000004agp

Setup Home Object Manager

Search Setup

Approval

Data

Mass Transfer for Approval Requests

Feature Settings

Approval Settings

Process Automation

Approval Processes

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

Approval Processes

Approval Processes

Tenant: TenantApproval

Back to Approval Process List

Process Definition Detail Edit Close Deactivate

Process Name	TenantApproval	Active	✓
Unique Name	TenantApproval	Next Automated Approval Determined By	
Description			
Entry Criteria	Tenant__cVacant_Monthly Stay		
Record Eligibility	Administrators ONLY	Allow Submitters to Recall Approval Requests	<input type="checkbox"/>
Approval Assignment Email Template			
Initial Submitters	Tenant Owner		
Created By	System Administrator, 6/26/2025, 11:13 AM	Modified By	System Administrator, 6/26/2025, 11:13 PM

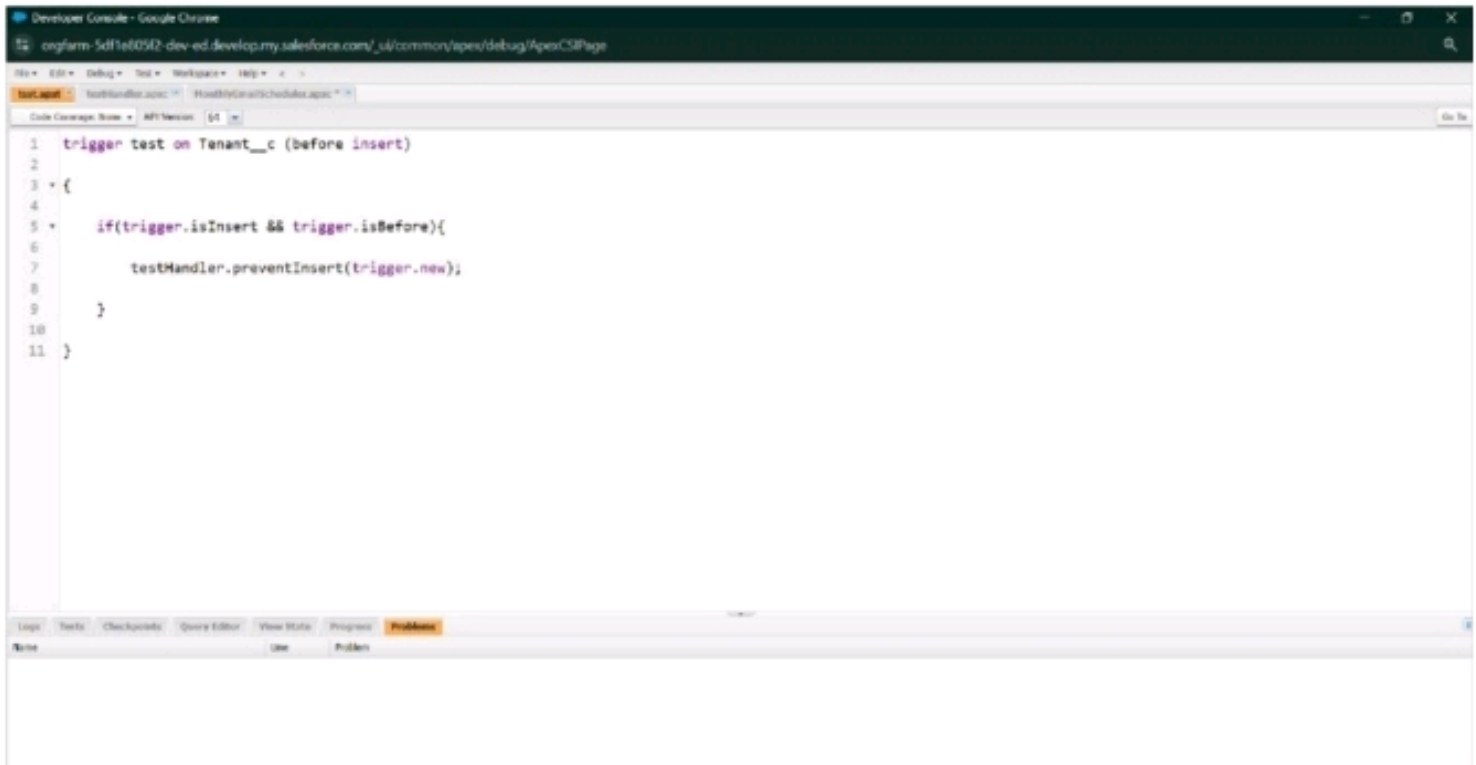
Initial Submission Actions Add Existing Add New

Action Name	Description
Record Lock	Lock the record from being edited

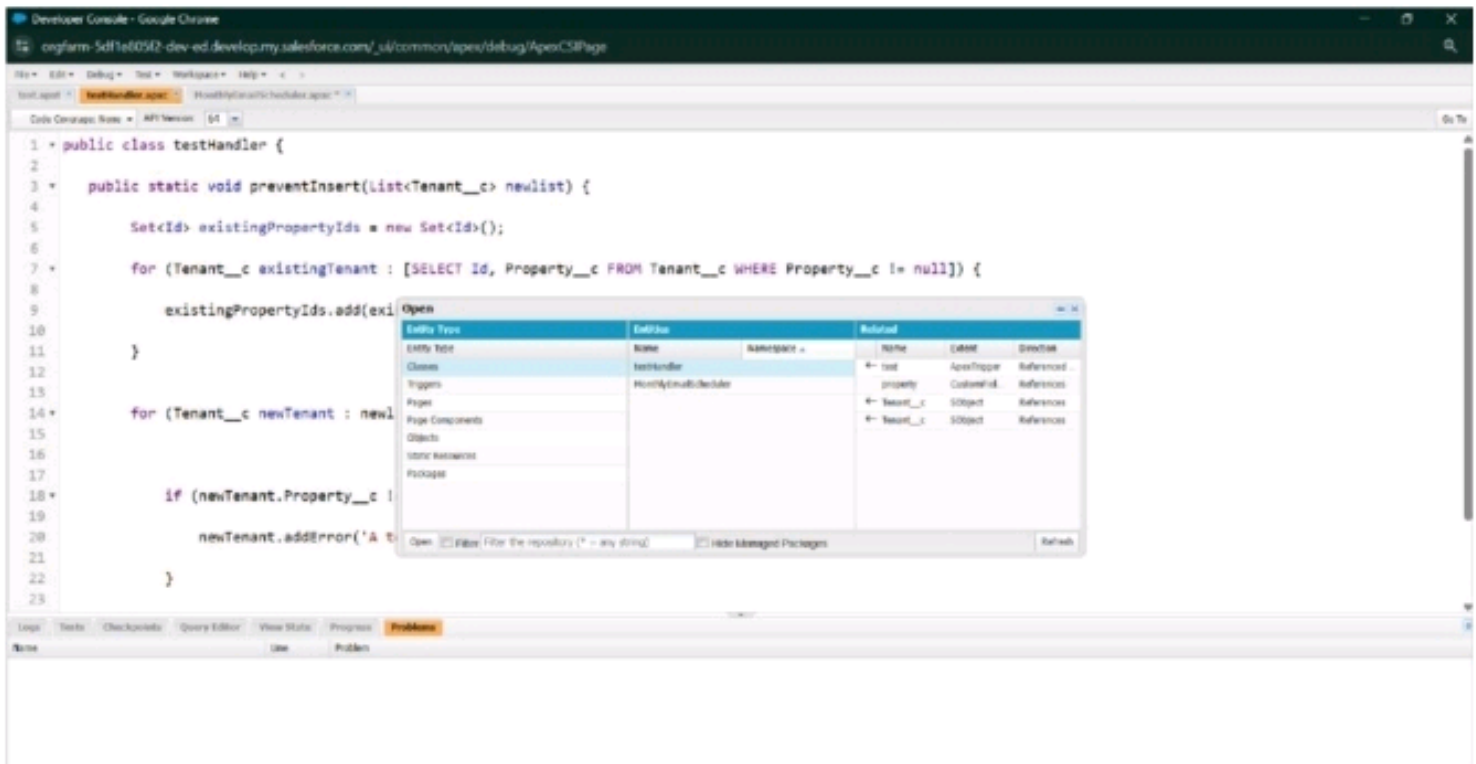
Approval Steps

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Send Action	1	Step 1			John.Doe@Sales.com	Final Rejection

For Check for Vacant:



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         for (Tenant__c newTenant : newList) {
14
15
16
17             if (newTenant.Property__c != null && existingPropertyIds.contains(newTenant.Property__c)) {
18
19                 newTenant.addError('A tenant can have only one property');
20
21             }
22
23         }
24     }
25 }
```

● FLOWS

org.farm-5d1e605d2-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowbuilder.app/flowId=301g000000AcozaQAB

Flow builder | monthly payment - V1

Select Elements

Auto-Layout

Last saved on 6/21/2025, 04:20 PM

Active

Run

Debug

View Tests

Save As New Version

Save

Deactivate

Record-Triggered Flow

Start

Object: Payment for tenant

Trigger: A record is updated

Conditions: 1

Optimize for: Actions and Related Recor...

+ Add Scheduled Paths (Optional)

Open Flow Trigger Explorer for Payme...

Run immediately

+ send email

End

Configure Start

Field

Operator

Value

check for payment

Equals

Field

+ Add Condition

When to Run the Flow for Updated Records

Every time a record is updated and meets the condition requirements

Only when a record is updated to meet the condition requirements

Optimize Flow

Optimize the Flow for:

Fast Field Updates

Update fields on the record that triggers the flow to run. This high-performance flow runs **before the record is saved** to the database.

Actions and Related Records

Update any record and perform actions, like send an email. This more flexible flow runs **after the record is saved** to the database.

Is this flow making an external callout or connecting to an external system?

An asynchronous path is required for flows that involve external systems.

Add Asynchronous Path

Flow Builder interface showing a Record-Triggered Flow configuration for "Payment for tenant".

Record-Triggered Flow Start

- Object: **Payment for tenant** (Edit)
- Trigger: **A record is updated**
- Conditions: **1**
- Optimize for: **Actions and Related Records**
- + Add Scheduled Paths (Optional)
- Open Flow Trigger Explorer for Payment for tenant

Run Immediately

send email (Action)

End

Configure Start

Select Object

Select the object whose records trigger the flow when they're created, updated, or deleted.

* 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)

Field Operator Value

- Schedule class:
Create an Apex Class

Developer Console - Google Chrome

orgfarm-5df1e605f2-dev-ed.develop.my.salesforce.com / ui/common/apex/debug/ApexCSPage

Test.apex | TestRunner.apex | MonthlyEmailScheduler.apex

Code Coverage: None | API Version: 54

```

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
16 *   public static void sendMonthlyEmail
17
18       List<Tenant__c> tenants = [SELE
19
20 *   for (Tenant__c tenant : tenants
21
22       String recipientEmail = tenant.Email__c;
23

```

Open

Library Type	Full Name	Namespace	Reference	Parent	Details
Entry Type	testRunner				
Classes	MonthlyEmailScheduler				
Triggers					
Page Components					
Objects					
Static Resources					
Packages					

Open | Filter the repository (F) - any string | Hide Managed Packages | Refresh

Logs | Tests | Checkpoints | Query Editor | View Status | Progress | Problems

None | Use | Problem

```
Developer Console - Google Chrome
org/force-5d11e00562-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSPage

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             sendMonthlyEmail();
9         }
10    }
11
12
13
14
15
16
17    public static void sendMonthlyEmail() {
18        List<Tenant__c> tenants = [SELECT Id, Email__c FROM Tenant__c];
19        for (Tenant__c tenant : tenants) {
20            String recipientEmail = tenant.Email__c;
21
22            String emailContent = "Hi there! 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."
23            String emailSubject = "Reminder: Monthly Rent Payment Due";
24            Messaging.SingleEmailMessage email = new Messaging.SingleEmailMessage();
25            email.setHtmlBody(htmlContent);
26            email.setSubject(emailSubject);
27            email.setToAddresses(new String[]{recipientEmail});
28            Messaging.sendEmail(new Messaging.SingleEmailMessage(email));
29        }
30    }
31
32 }
```

Schedule Apex class

Setup

Home

Object Manager

apex

Email

Custom Code

Apex Classes

Apex Settings

Apex Test Execution

Apex Test History

Apex Triggers

Environments

Jobs

Apex Flow Queue

Apex Jobs

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

Apex Classes

Apex Class Detail

Name

MonthlyEmailScheduler

Status

Active

Namespace Prefix

Code Coverage

0% (0/0)

Created By

Sourceya Team

Last Modified By

Sourceya Team

Created At

6/23/2025, 2:46 AM

Last Modified At

6/23/2025, 2:47 AM

Class Body

Class Summary

Version Settings

Trace Flags

```
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             sendMonthlyEmail();
9         }
10    }
11
12
13
14
15
16    public static void sendMonthlyEmail() {
17        List<Tenant__c> tenants = [SELECT Id, Email__c FROM Tenant__c];
18        for (Tenant__c tenant : tenants) {
19
20
```

org:lam 5d1e8052-dev-ed.develop.lightning.force.com/lightning/r/Tenant_.../view

Lease Management Payment **Tenants** property lease

Tenant **Aswini** New Contact Edit New Opportunity

Related **Details**

* = Required Information

* Tenant Name: Aswini Owner: Sowmya Team

* Email: aswinimaraadi15@gmail.com

Phone: (905) 223-5567

Status: Leaving

Property: Iran

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 time • 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.

- New Case
- New Lead
- Delete
- Clone
- Change Owner
- Printable View
- Submit for Approval**
- Edit Labels

org:lam 5d1e8052-dev-ed.develop.lightning.force.com/lightning/r/Tenant_.../view

Lease Management Payment **Tenants** property lease

Tenant **Aswini** Tenant was submitted for approval. New Contact Edit New Opportunity

Related **Details**

* = Required Information

* Tenant Name: Aswini Owner: Sowmya Team

* Email: aswinimaraadi15@gmail.com

Phone: (905) 223-5567

Status: Leaving

Property: Iran

Created By: Sowmya Team, 6/26/2025, 6:05 AM Last Modified By: Sowmya Team, 6/26/2025, 11:06 PM

Cancel Save

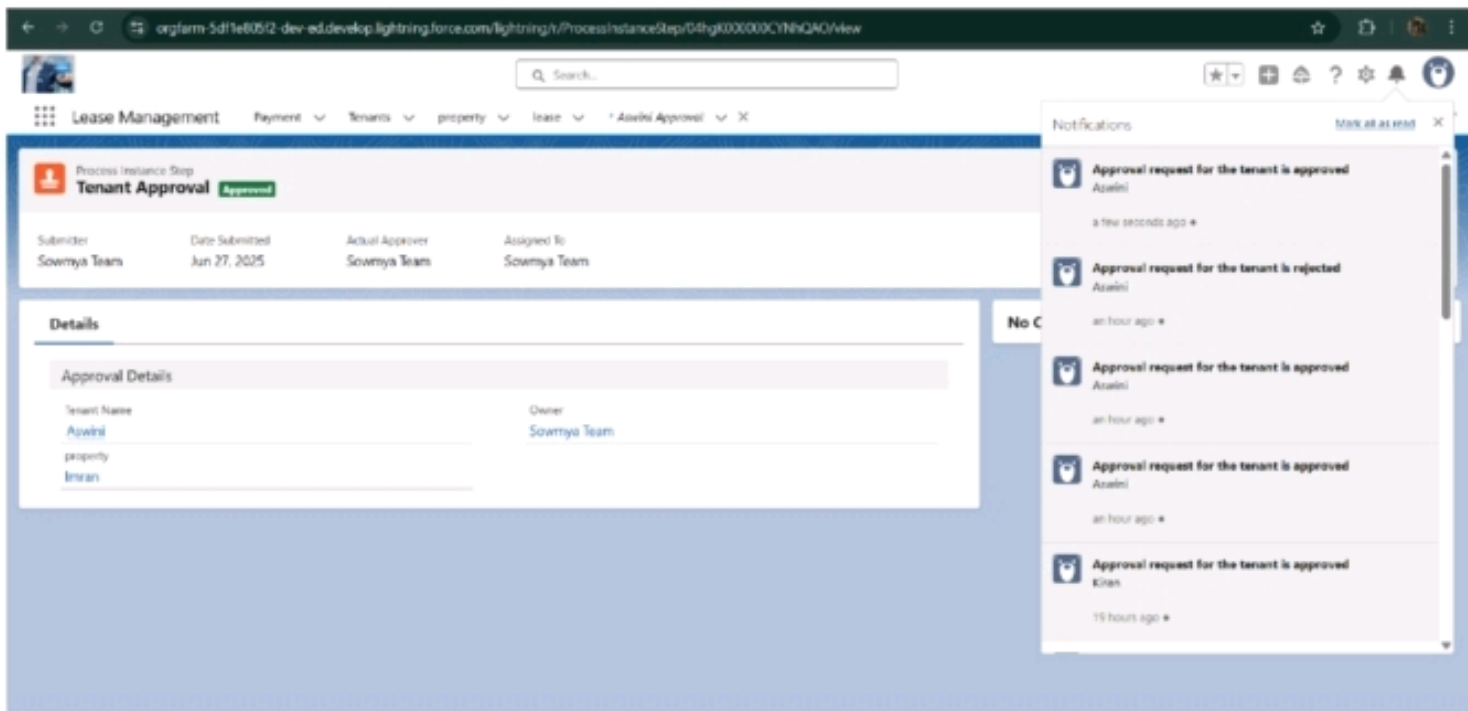
Activity

Filters: All 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.



FUNCTIONAL AND PERFORMANCE TESTING

Performance Testing

- Trigger validation by entering duplicate tenant-property records

New Tenant

* = Required Information

Information

*Tenant Name: chinnu

*Email: chinnu@gmail.com

Phone:

Status: Stay

Property: Parkside

We hit a snag.

Review the errors on this page.

- A tenant can have only one property

Cancel Save & New Save

- Validation Rule checking

Lease Details

* = Required Information

*Lease Name: supriya

Owner: Sowmya Team

Start Date: 6/20/2025

Your End date must be greater than start date

End Date: 6/19/2025

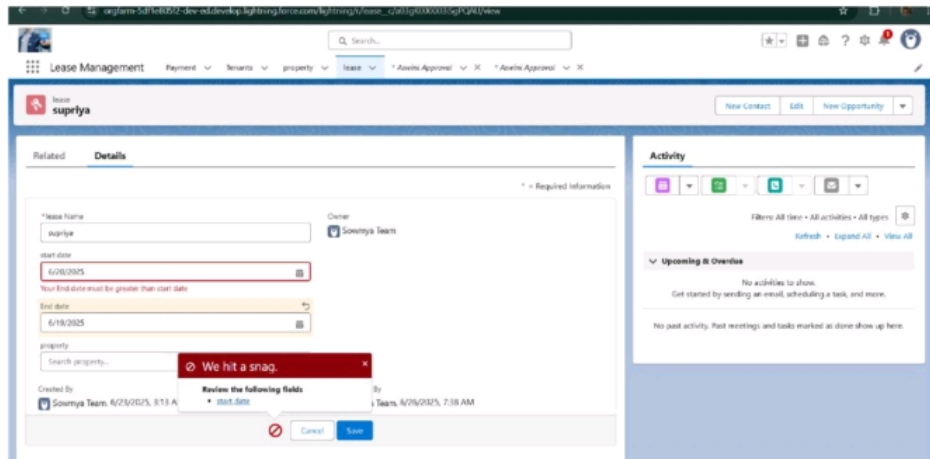
Property: Search property...

We hit a snag.

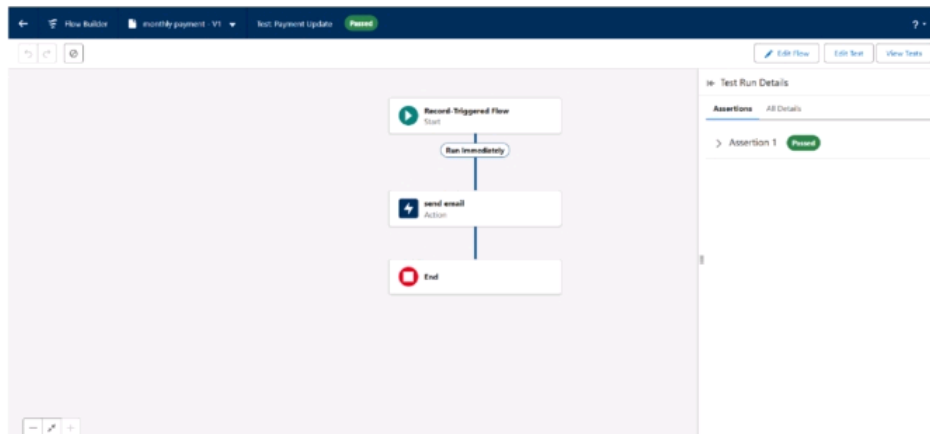
Review the following fields

- start.date

Cancel Save



- Test flows on payment update



- Approval process validated through email alerts and status updates

Lease Management

Payment

Tenants

property

lease

* niranjan Approval

X

Tenant

niranjan

Related

Details

* Required Information

* Tenant Name

niranjan

Owner

Sowmya Team

* Email

niranjan1206@gmail.com

Phone

Status

Stay

Property

Parkside Lofts

Created By

Sowmya Team, 6/23/2025, 2:33 AM

Last Modified By

Sowmya Team, 6/23/2025, 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, 2025, 4:29 PM

Approval request for the tenant is approved

niranjan

Jun 23, 2025, 4:25 PM

Approval request for the tenant is approved

niranjan

Jun 23, 2025, 4:14 PM

New Guidance Center learning resource available

Define Your Sales Process

Learn how to guide reps through the sales process.

Jun 20, 2025, 1:20 PM

Lease Management

Payment

Tenants

property

lease

Tenant

niranjan

New Contact

Edit

New Opportunity

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

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

Approval History (6+)

Step Name	Date	Status	Assigned To
Step 1	6/23/2025, 5:39 AM	Approved	Sowmya Team
Approval Request Submitted	6/23/2025, 5:39 AM	Submitted	Sowmya Team
Step 1	6/23/2025, 3:59 AM	Rejected	Sowmya Team
Approval Request Submitted	6/23/2025, 3:58 AM	Submitted	Sowmya Team
Step 1	6/23/2025, 3:55 AM	Approved	Sowmya Team
Approval Request Submitted	6/23/2025, 3:55 AM	Submitted	Sowmya Team

View All

Payment (2)

New

Payment Name

Jack

Payment Name

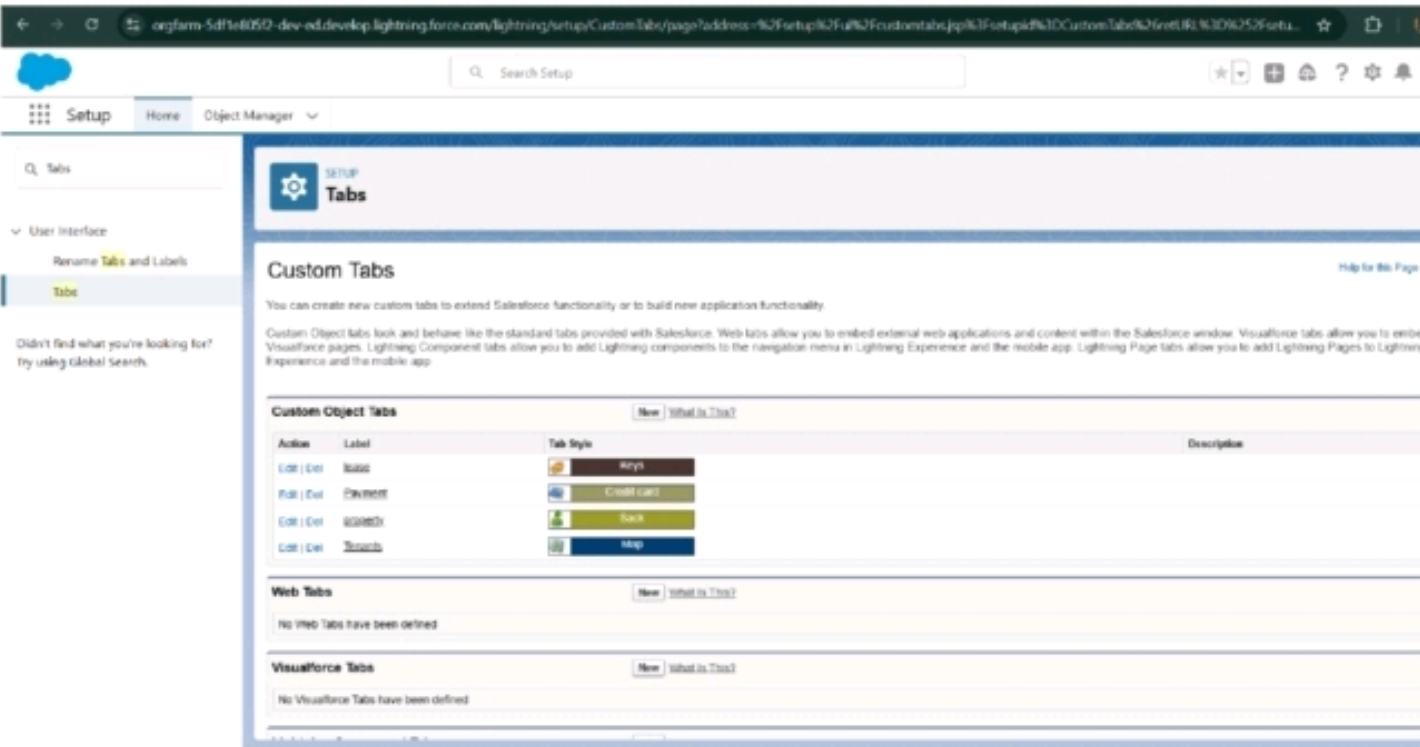
Pahul

View All

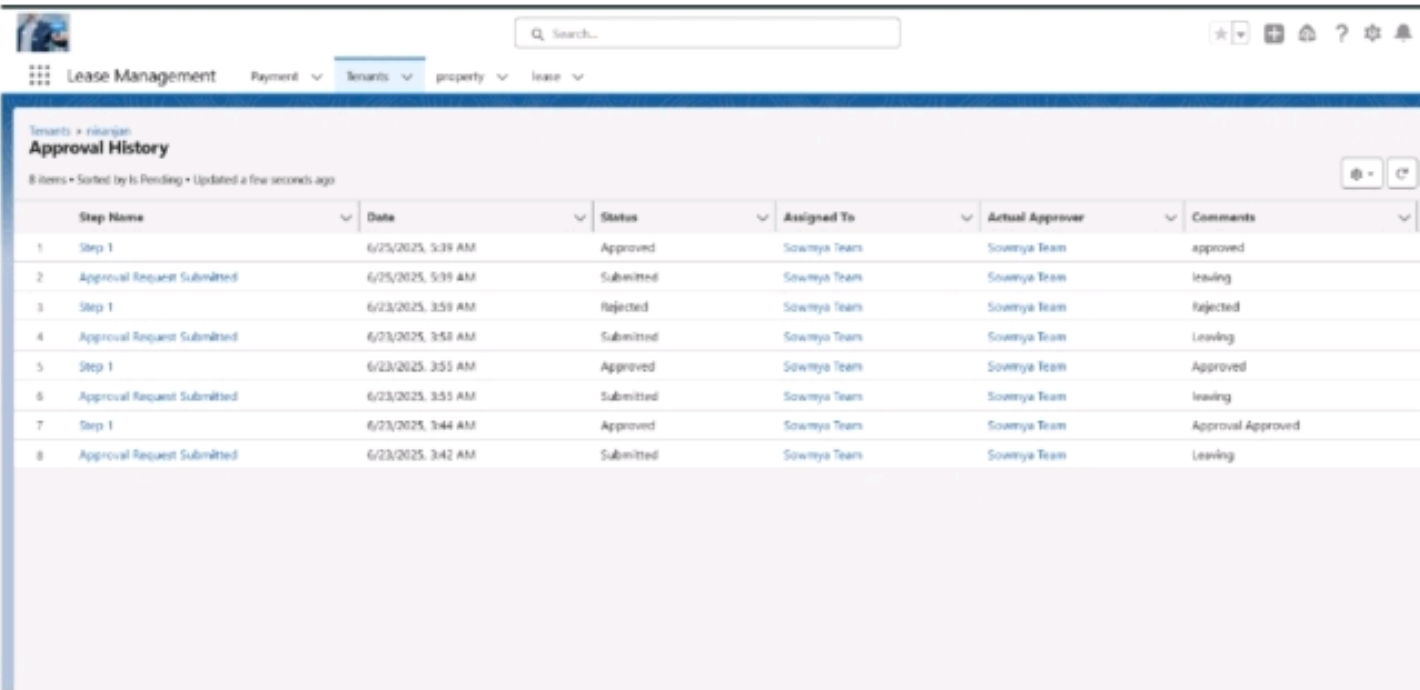
RESULTS

Output Screenshots

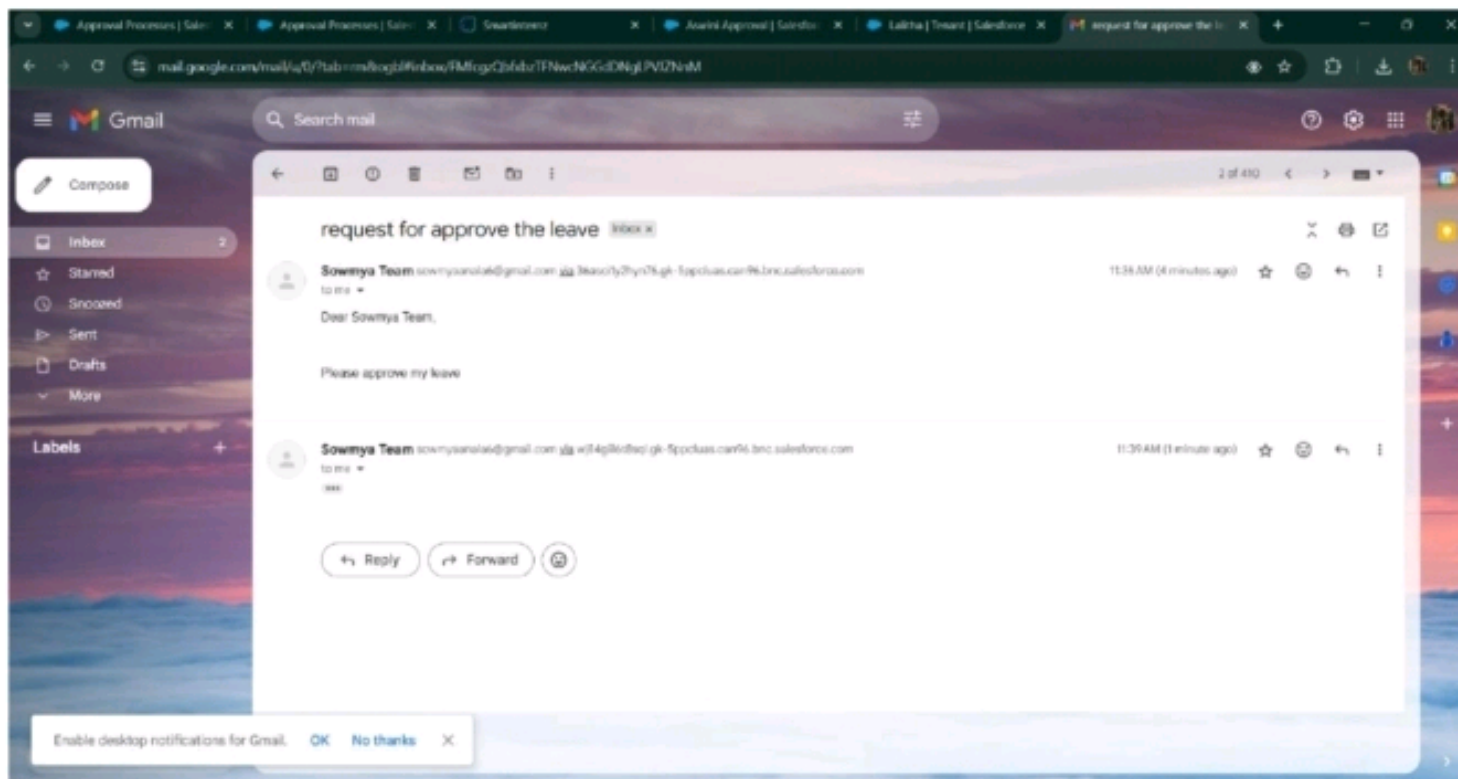
- Tabs for Property, Tenant, Lease, Payment



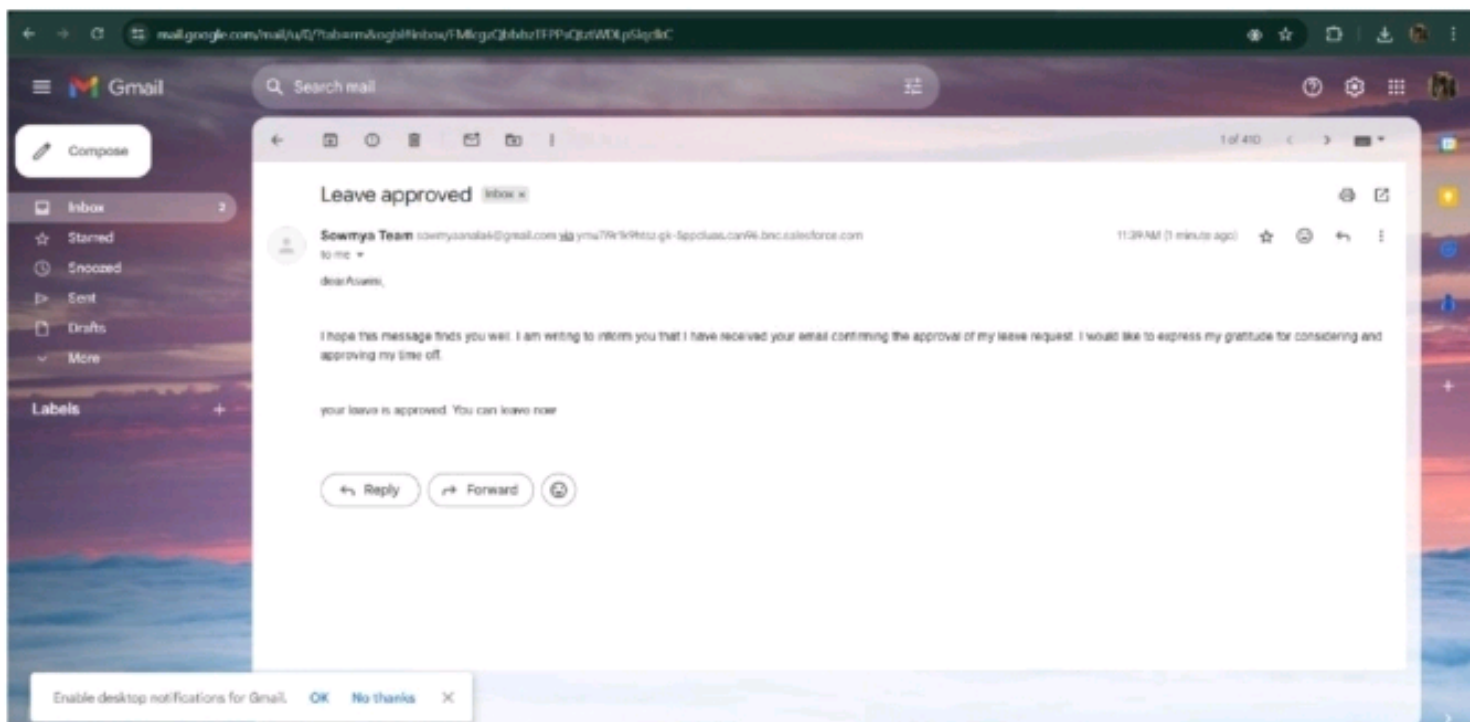
- Email alerts



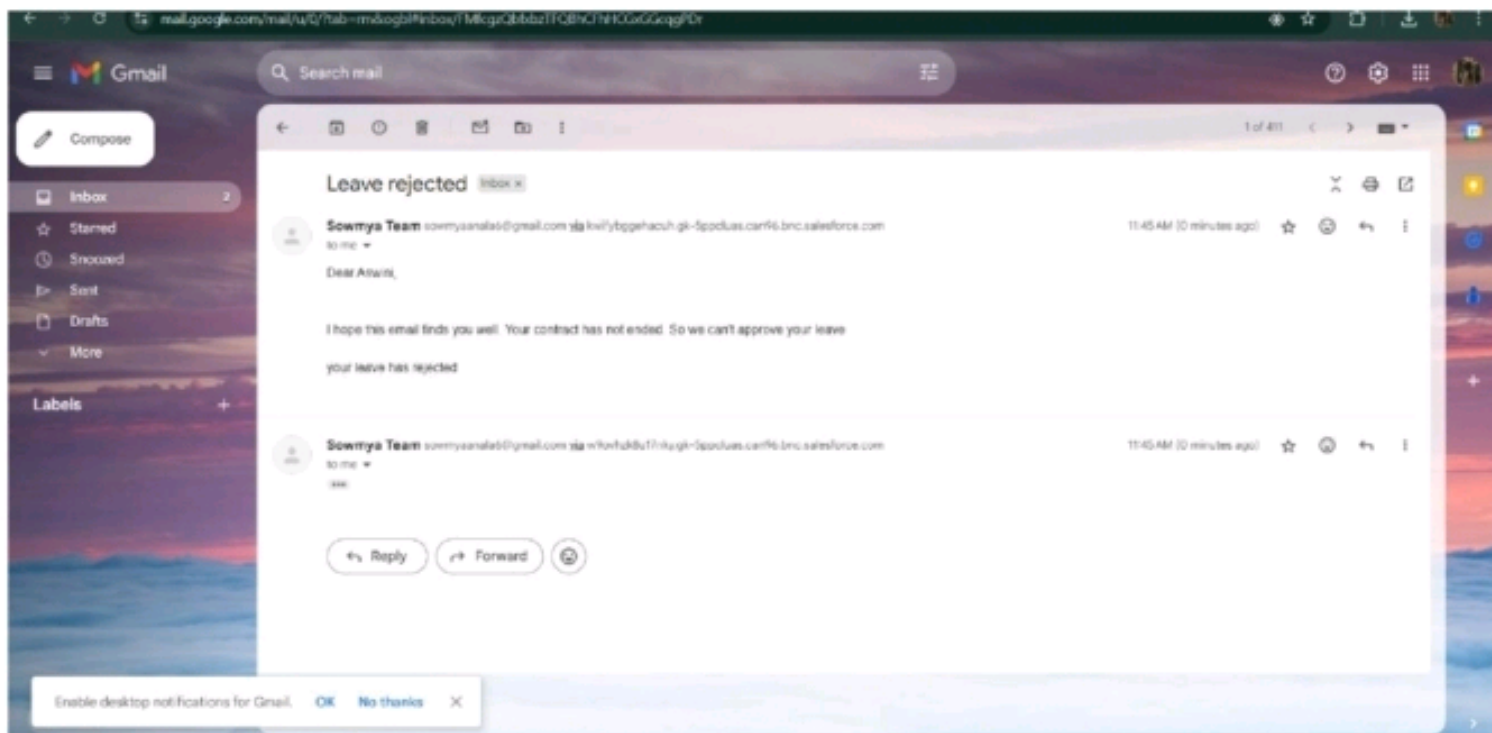
- Request for approve the leave



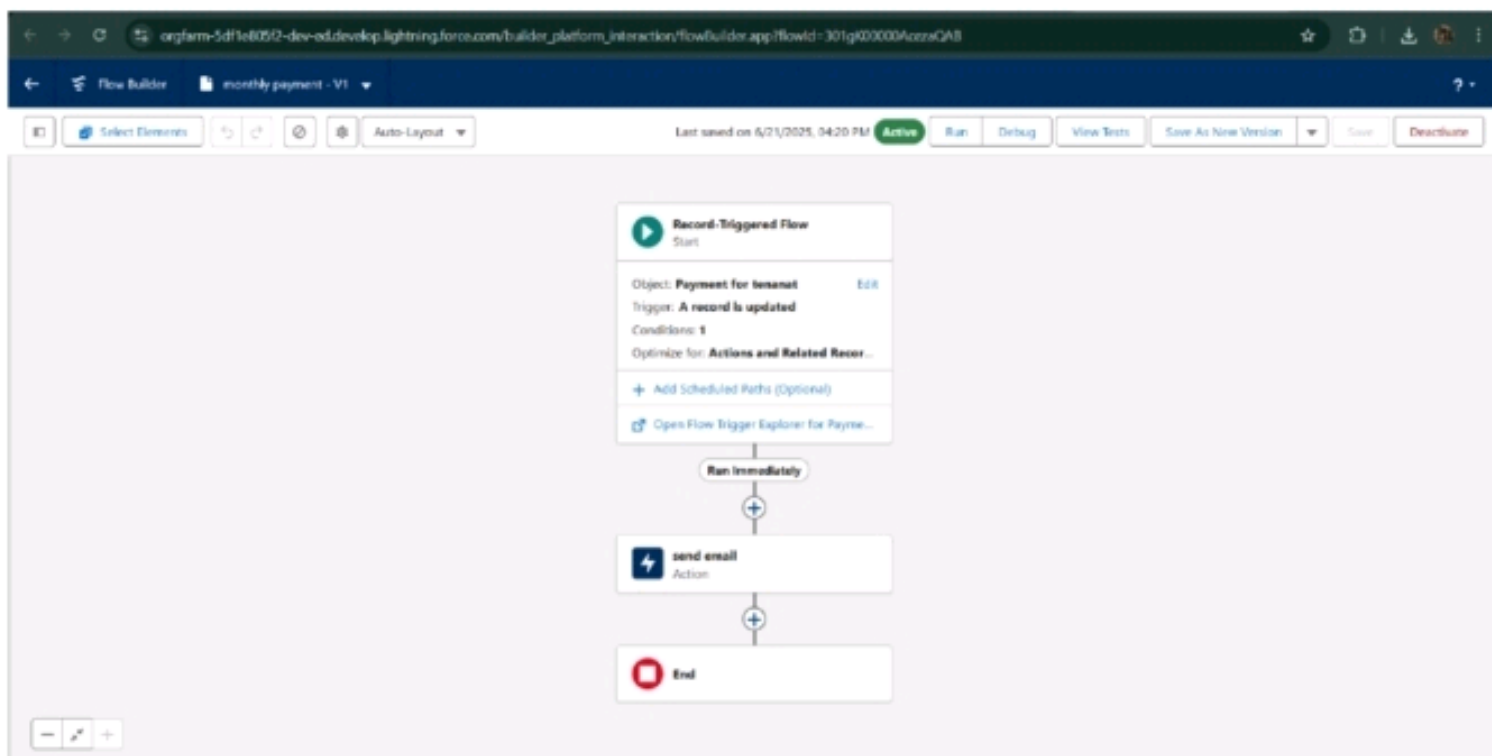
- Leave approved



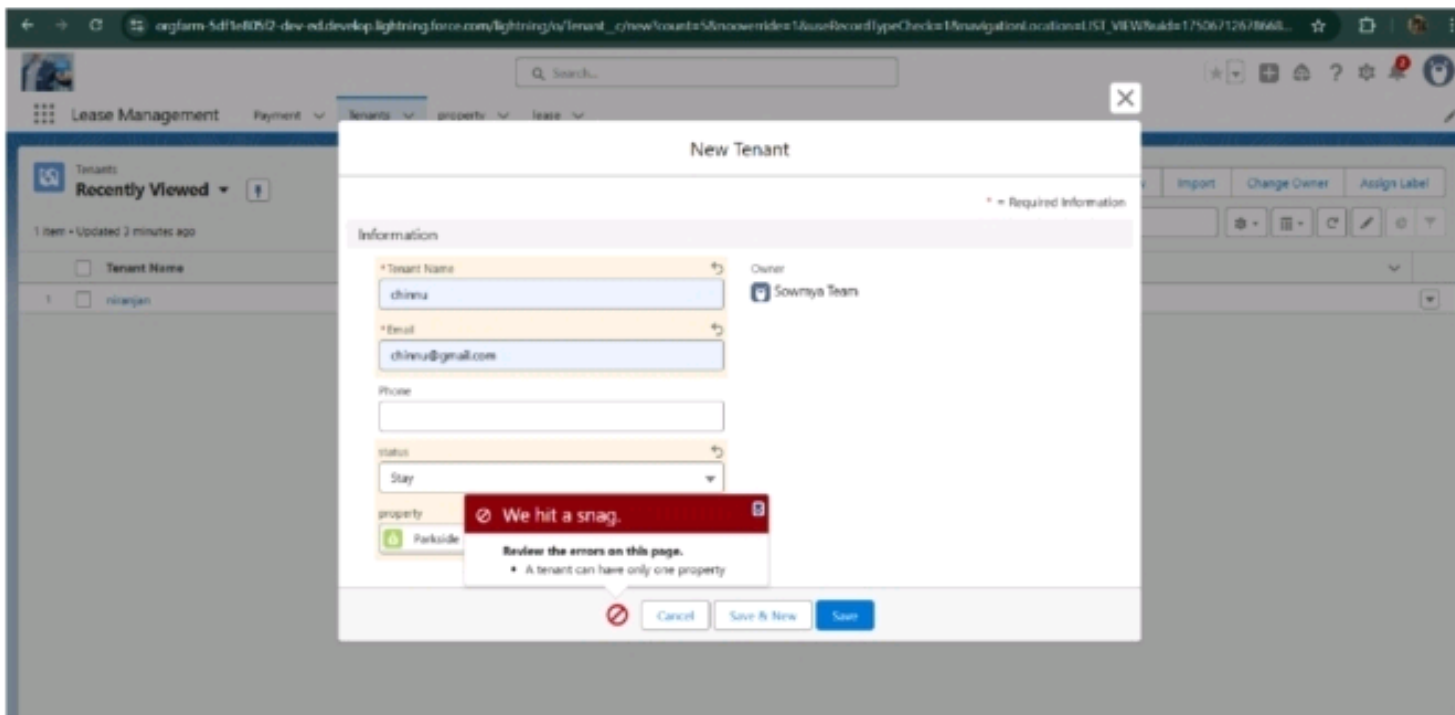
- Leave rejected



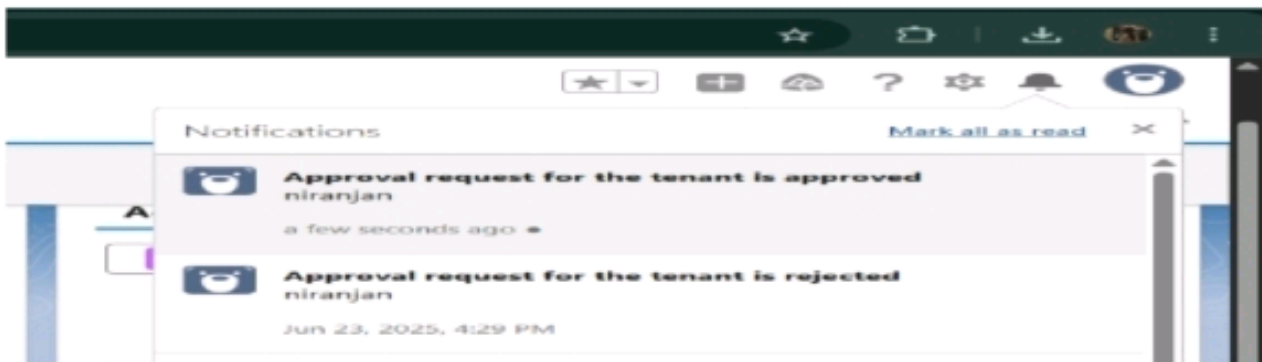
● Flow runs



● 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});
}
}
}
```