LEASE MANAGEMENT

College Name: HINDUSTHAN COLLEGE OF SCIENCE AND COMMERCE

College Code: CA

Team ID : NM2025TMID28185

TEAM MEMBERS: 4

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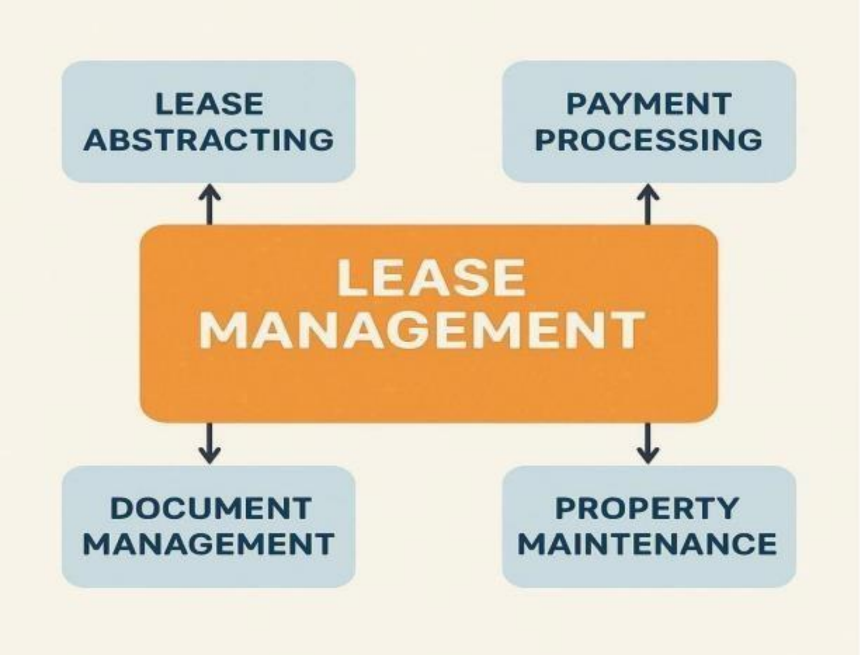
Team Member: SUKANTH.M

Email: sukanthm@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.

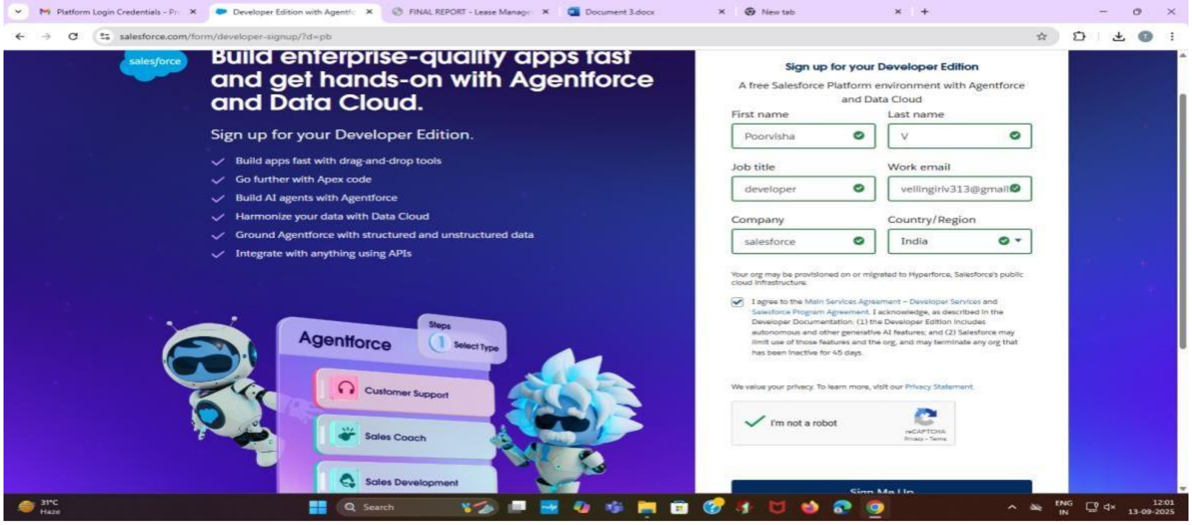

LEASE ABSTRACTING
PAYMENT PROCESSING
LEASE MANAGEMENT
DOCUMENT MANAGEMENT
PROPERTY MAINTENANCE

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


Platform Login Credentials - Pr
Developer Edition with Agentfo
FINAL REPORT - Lease Manage
Document 3.docx
New tab
salesforce.com/form/developer-signup/?d=pb
salesforce
Agentforce
Steps
1 Select Type
Customer Support
Sales Coach
Sales Development
Sign Me Up
31°C
Haze
Search
ENG
IN
12:01
13-09-2025

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- ✓ Integrate with anything using APIs

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A free Salesforce Platform environment with Agentforce and Data Cloud

First name: Poorvisha
Last name: V
Job title: developer
Work email: vellingiriv313@gmail
Company: salesforce
Country/Region: India

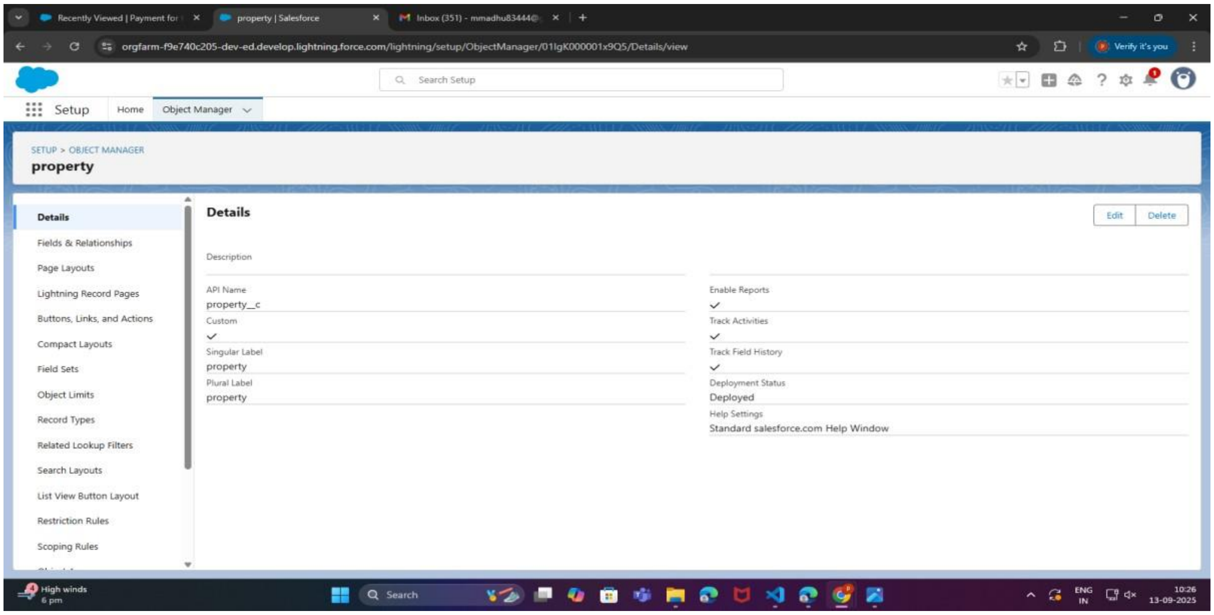
Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud infrastructure.

☑ 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.

✓ I'm not a robot

- Created objects: Property, Tenant, Lease, Payment


Recently Viewed | Payment for
property | Salesforce
Inbox (351) - mmadhu83444@
orgfarm-f9e740c205-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgK000001x9Q5/Details/view
Verify it's you
Search Setup
Setup
Home
Object Manager
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
Edit
Delete
High winds
6 pm
Search
ENG
IN
10:26
13-09-2025

SETUP > OBJECT MANAGER

property

Details

Description

API Name
property__c

Custom
✓

Singular Label
property

Plural Label
property

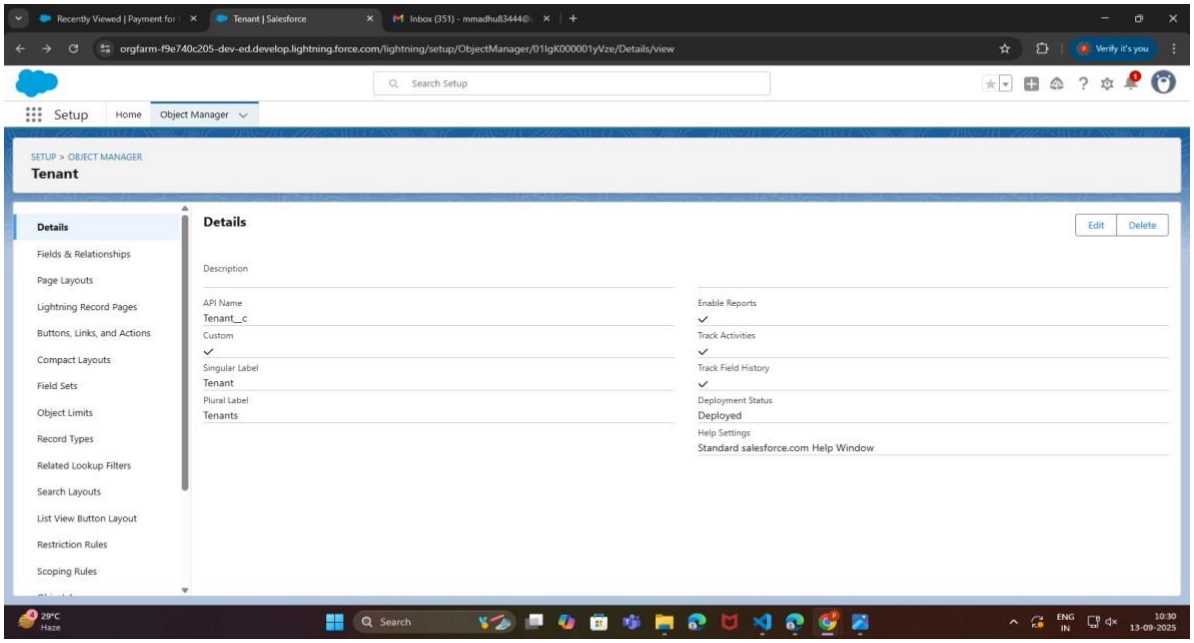
Enable Reports
✓

Track Activities
✓

Track Field History
✓

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window


Recently Viewed | Payment for
Tenant | Salesforce
Inbox (351) - mmadhu83444@
orgfarm-f9e740c205-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgK000001yVze/Details/view
Verify it's you
Search Setup
Setup
Home
Object Manager
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
Edit
Delete
29°C
Haze
Search
ENG
IN
10:30
13-09-2025

SETUP > OBJECT MANAGER

Tenant

Details

Description

API Name
Tenant__c

Custom
✓

Singular Label
Tenant

Plural Label
Tenants

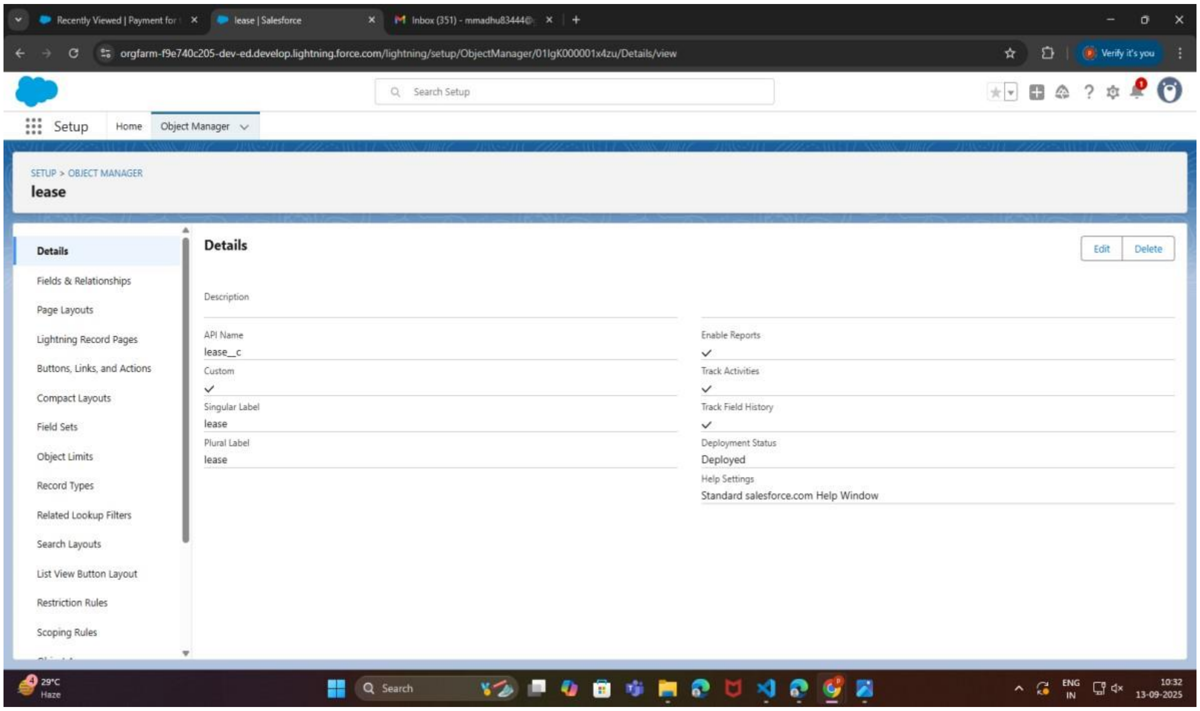
Enable Reports
✓

Track Activities
✓

Track Field History
✓

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window


Setup
Home
Object Manager
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
Edit
Delete

SETUP > OBJECT MANAGER

lease

Details

Description

API Name: lease__c

Custom: ✓

Singular Label: lease

Plural Label: lease

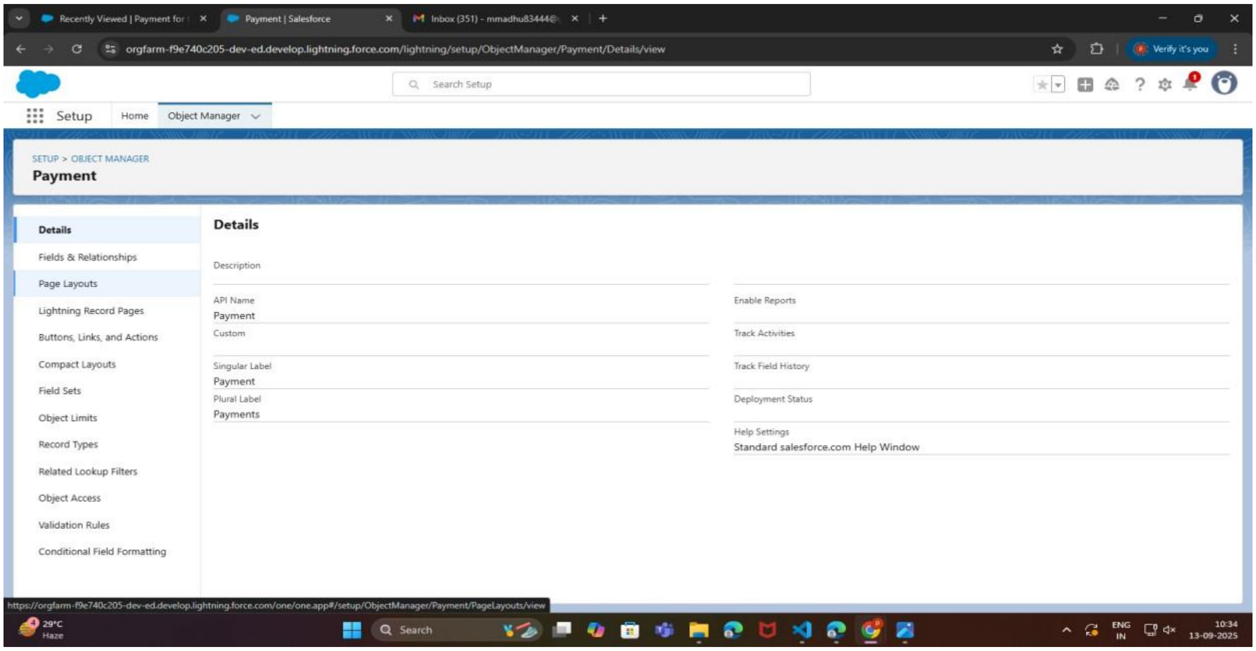
Enable Reports: ✓

Track Activities: ✓

Track Field History: ✓

Deployment Status: Deployed

Help Settings: Standard salesforce.com Help Window


Setup
Home
Object Manager
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Object Access
Validation Rules
Conditional Field Formatting

SETUP > OBJECT MANAGER

Payment

Details

Description

API Name: Payment

Custom

Singular Label: Payment

Plural Label: Payments

Enable Reports

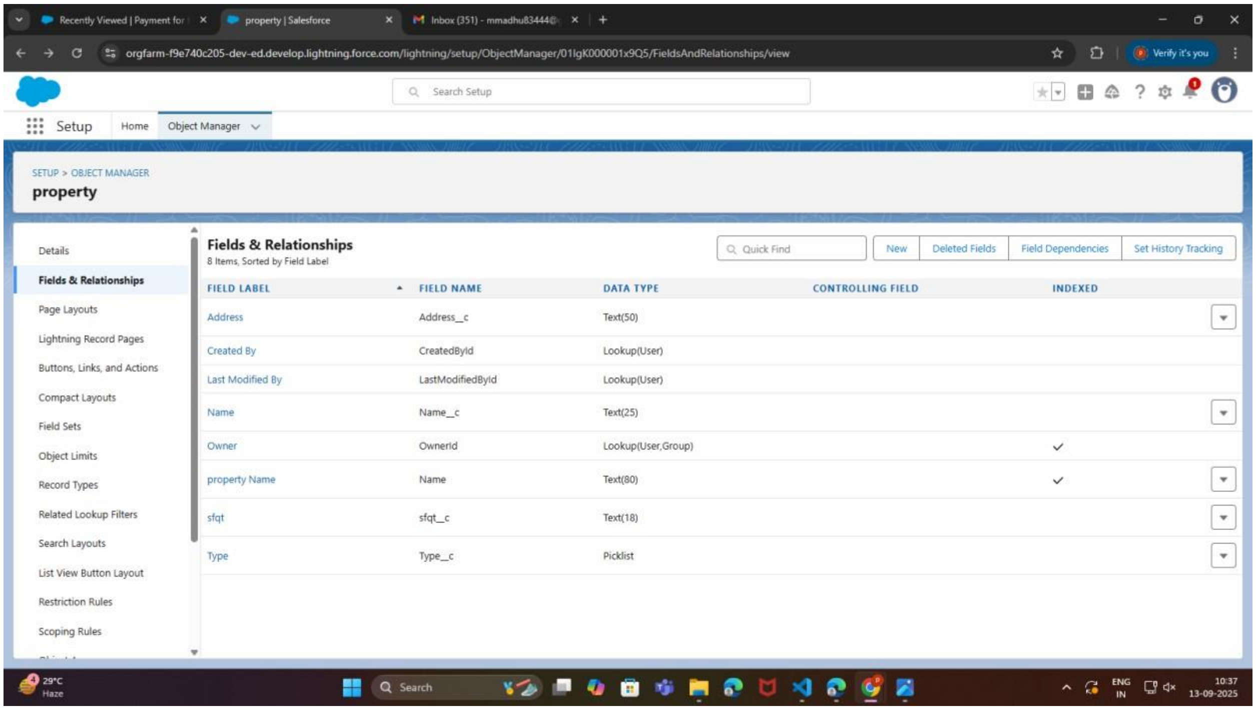
Track Activities

Track Field History

Deployment Status

Help Settings: Standard salesforce.com Help Window

- Configured fields and relationships


Recently Viewed | Payment for
property | Salesforce
Inbox (351) - mmadhu83444@
orgfarm-f9e740c205-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgK000001x9Q5/FieldsAndRelationships/view
Verify it's you
Search Setup
Setup
Home
Object Manager
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
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
29°C
Haze
Search
ENG
IN
10:37
13-09-2025

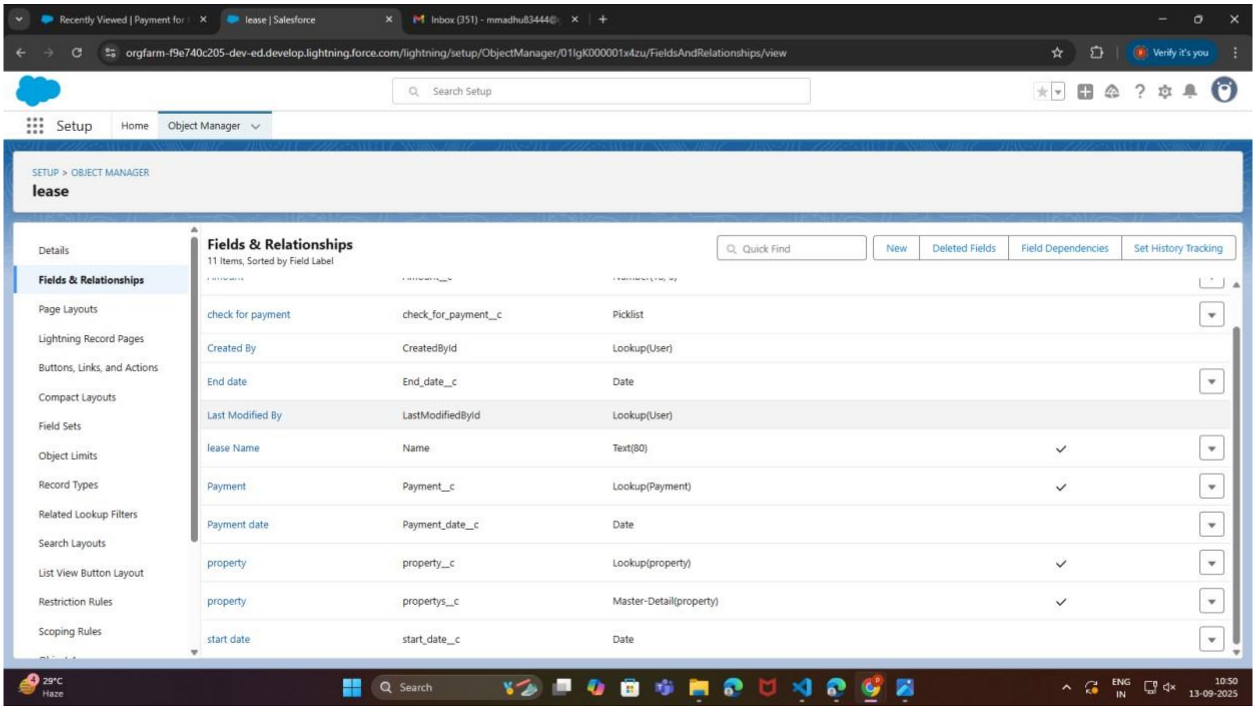
SETUP > OBJECT MANAGER

property

Fields & Relationships

8 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Text(50)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Text(25)		
Owner	OwnerId	Lookup(User,Group)		✓
property Name	Name	Text(80)		✓
sfqt	sfqt__c	Text(18)		
Type	Type__c	Picklist		


Recently Viewed | Payment for
lease | Salesforce
Inbox (351) - mmadhu83444@
orgfarm-f9e740c205-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgK000001x4zu/FieldsAndRelationships/view
Verify it's you
Search Setup
Setup
Home
Object Manager
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Lightning Record Pages
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Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
29°C
Haze
Search
ENG
IN
10:50
13-09-2025

SETUP > OBJECT MANAGER

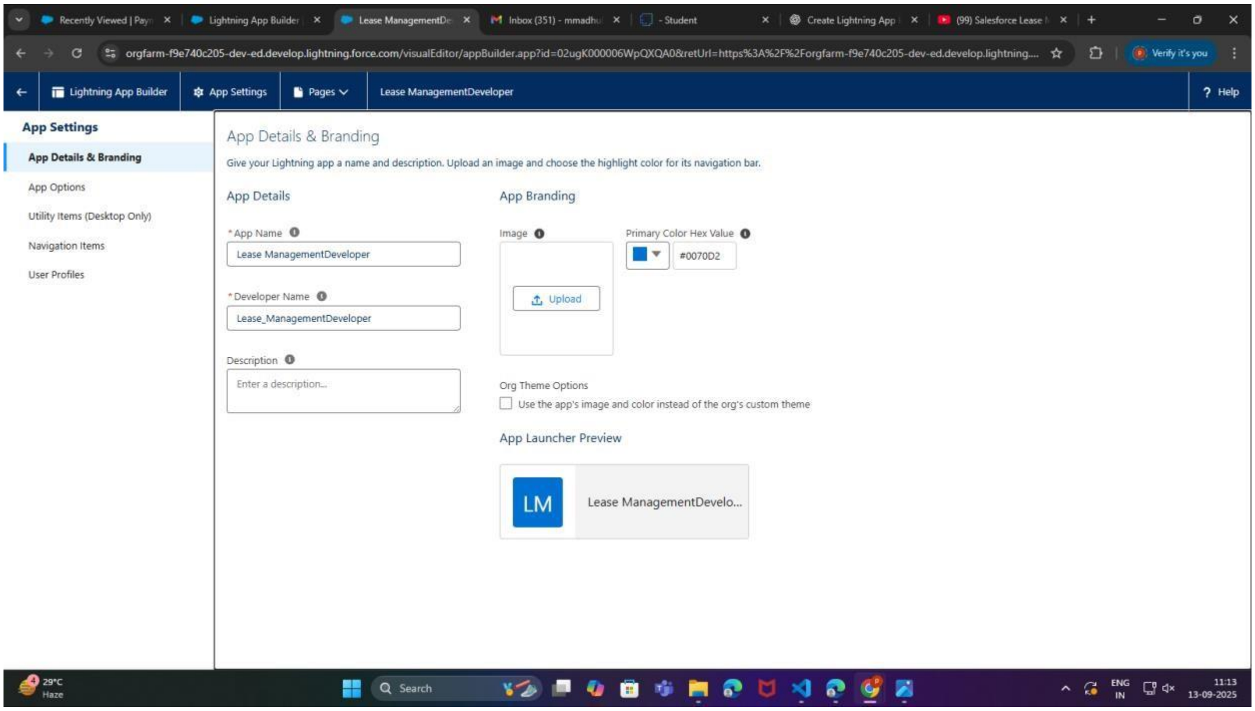
lease

Fields & Relationships

11 Items, Sorted by Field Label

check for payment	check_for_payment__c	Picklist	
Created By	CreatedById	Lookup(User)	
End date	End_date__c	Date	
Last Modified By	LastModifiedById	Lookup(User)	
lease Name	Name	Text(80)	✓
Payment	Payment__c	Lookup(Payment)	✓
Payment date	Payment_date__c	Date	
property	property__c	Lookup(property)	✓
property	propertys__c	Master-Detail(property)	✓
start date	start_date__c	Date	

- Developed Lightning App with relevant tabs


Lightning App Builder
App Settings
Pages
Lease ManagementDeveloper
Help
App Settings
App Details & Branding
App Options
Utility Items (Desktop Only)
Navigation Items
User Profiles
Upload
LM

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

*App Name: Lease ManagementDeveloper

*Developer Name: Lease_ManagementDeveloper

Description: Enter a description...

App Branding

Image

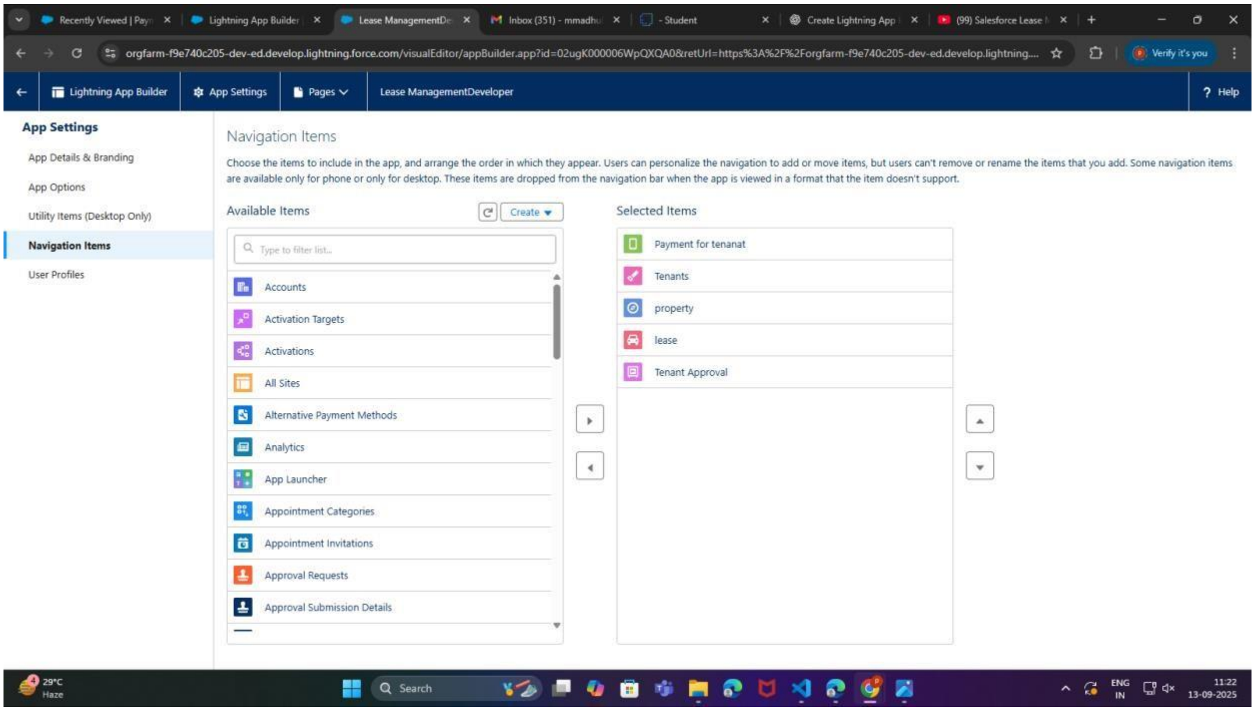
Primary Color Hex Value: #0070D2

Org Theme Options

☐ Use the app's image and color instead of the org's custom theme

App Launcher Preview

Lease ManagementDevelo...


Lightning App Builder
App Settings
Pages
Lease ManagementDeveloper
Help
App Settings
App Details & Branding
App Options
Utility Items (Desktop Only)
Navigation Items
User Profiles
Create
Type to filter list...

Navigation Items

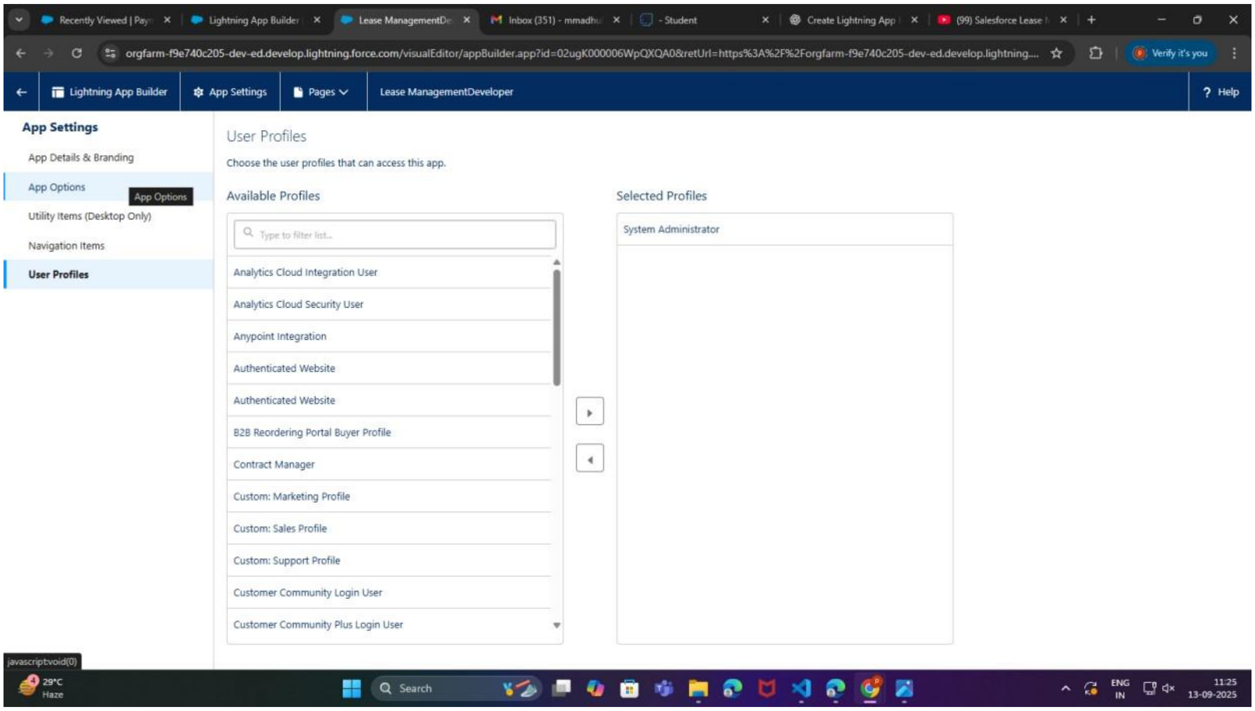
Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items

- Accounts
- Activation Targets
- Activations
- All Sites
- Alternative Payment Methods
- Analytics
- App Launcher
- Appointment Categories
- Appointment Invitations
- Approval Requests
- Approval Submission Details

Selected Items

- Payment for tenanat
- Tenants
- property
- lease
- Tenant Approval


Lightning App Builder
App Settings
Pages
Lease ManagementDeveloper
Help
App Settings
App Details & Branding
App Options
Utility Items (Desktop Only)
Navigation Items
User Profiles

User Profiles

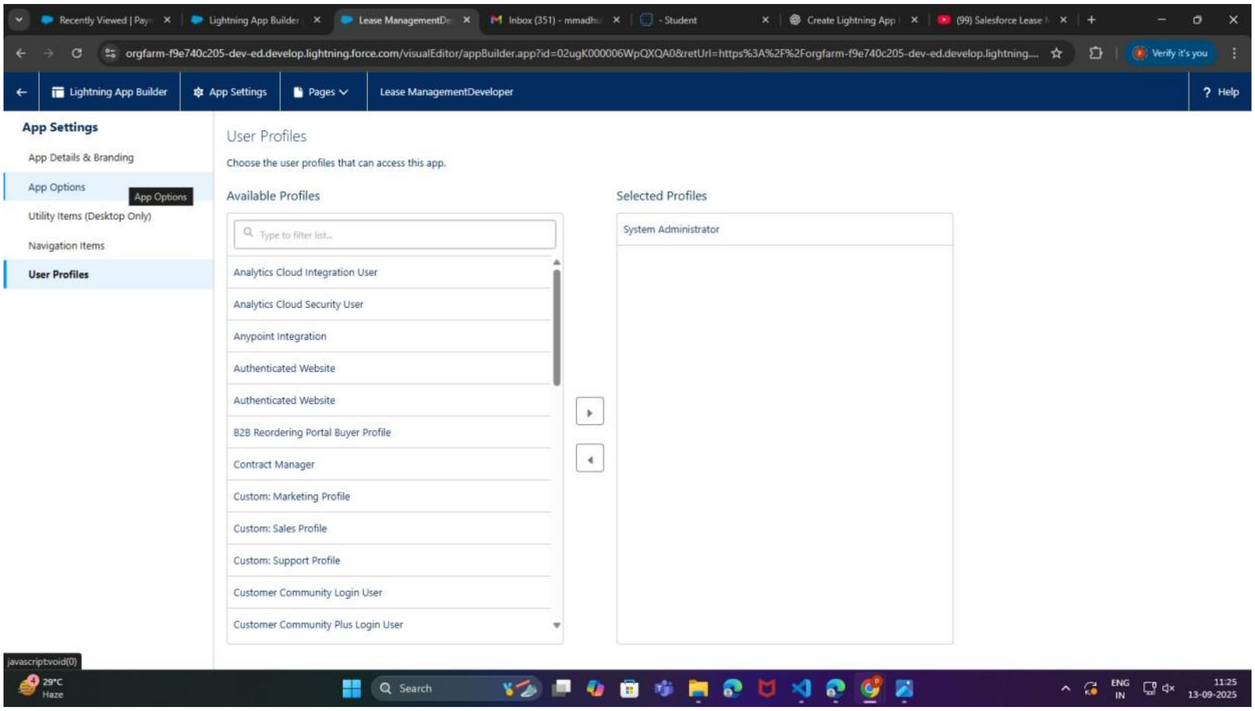
Choose the user profiles that can access this app.

Available Profiles

- Analytics Cloud Integration User
- Analytics Cloud Security User
- Anypoint Integration
- Authenticated Website
- Authenticated Website
- B2B Reordering Portal Buyer Profile
- Contract Manager
- Custom: Marketing Profile
- Custom: Sales Profile
- Custom: Support Profile
- Customer Community Login User
- Customer Community Plus Login User

Selected Profiles

- System Administrator


User Profiles

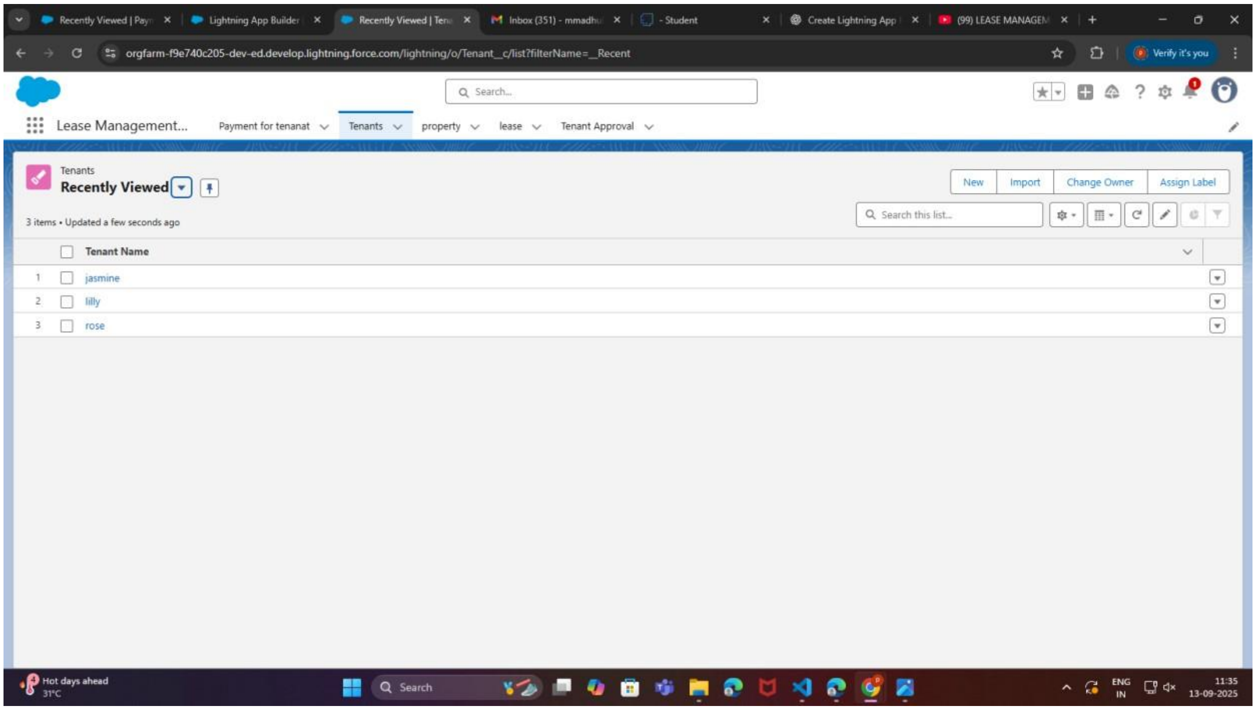
Choose the user profiles that can access this app.

Available Profiles

- Analytics Cloud Integration User
- Analytics Cloud Security User
- Anypoint Integration
- Authenticated Website
- Authenticated Website
- B2B Reordering Portal Buyer Profile
- Contract Manager
- Custom: Marketing Profile
- Custom: Sales Profile
- Custom: Support Profile
- Customer Community Login User
- Customer Community Plus Login User

Selected Profiles

- System Administrator


orgfarm-f9e740c205-dev-ed.develop.lightning.force.com/lightning/o/Tenant__c/list?filterName=__Recent
Lease Management...
Payment for tenanat
Tenants
property
lease
Tenant Approval
New
Import
Change Owner
Assign Label
Search this list...

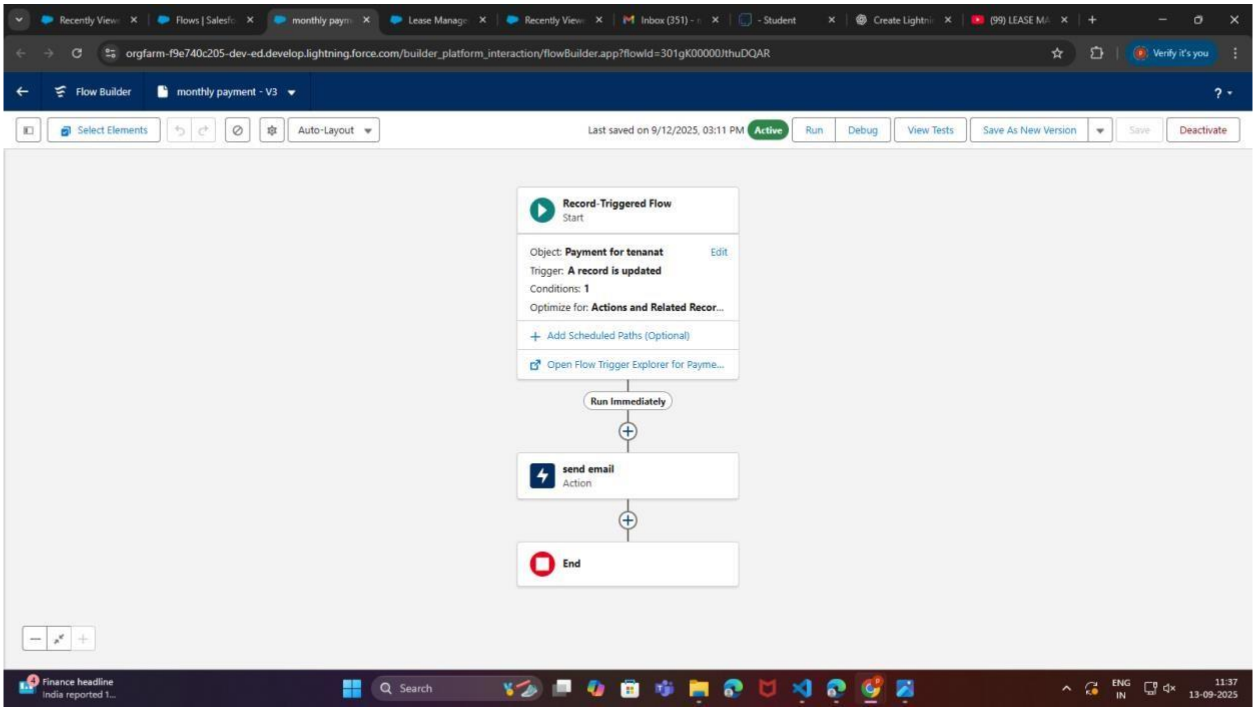
Tenants

Recently Viewed

3 items • Updated a few seconds ago

	Tenant Name
1	jasmine
2	lilly
3	rose

- Implemented Flows for monthly rent and payment success


orgfarm-f9e740c205-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=301gK00000JthuDQAR
Flow Builder
monthly payment - V3
Select Elements
Auto-Layout
Active
Run
Debug
View Tests
Save As New Version
Save
Deactivate
Edit
Add Scheduled Paths (Optional)
Open Flow Trigger Explorer for Payme...
Run Immediately

Last saved on 9/12/2025, 03:11 PM

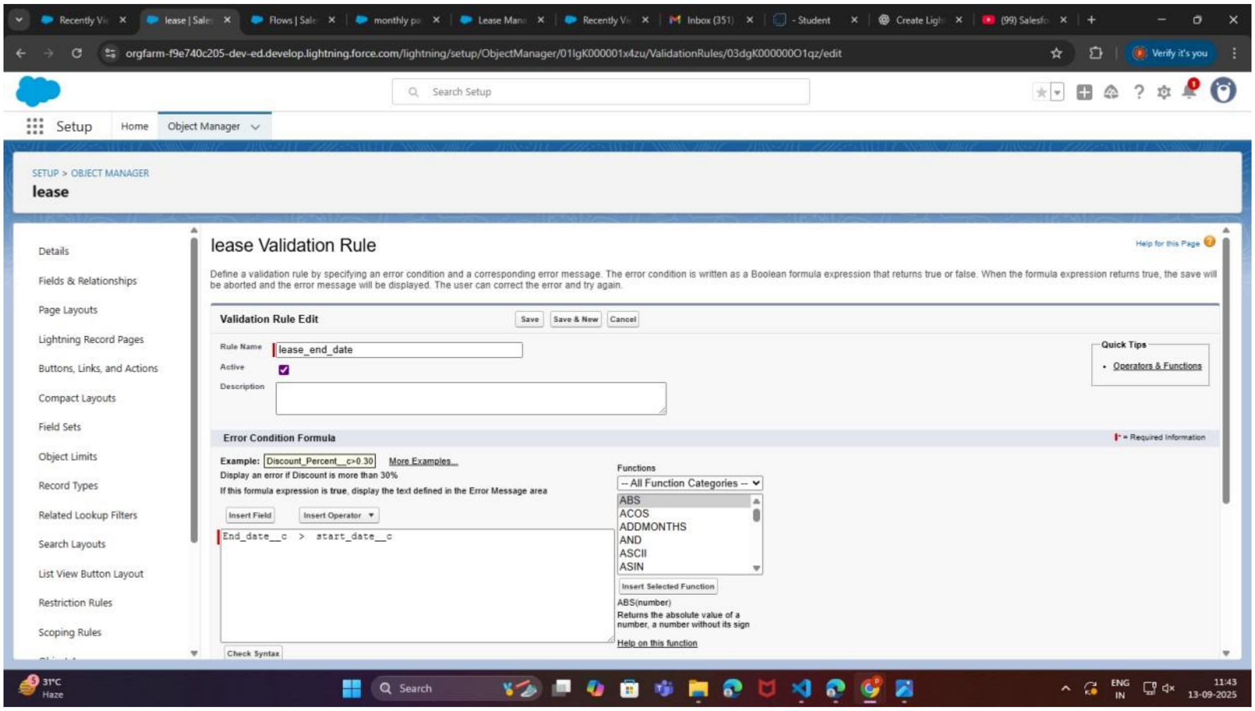
Record-Triggered Flow
Start

Object: Payment for tenanat
Trigger: A record is updated
Conditions: 1
Optimize for: Actions and Related Recor...

send email
Action

End

- To create a validation rule to a Lease Object


orgfarm-f9e740c205-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgK000001x4zu/ValidationRules/03dgK000000O1qz/edit
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
List View Button Layout
Restriction Rules
Scoping Rules
Help for this Page
Save
Save & New
Cancel
Quick Tips
Operators & Functions
= Required Information
More Examples...
Insert Field
Insert Operator
Functions
-- All Function Categories --
ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN
Insert Selected Function
Help on this function
Check Syntax
31°C
Haze
Search
ENG
IN
11:43
13-09-2025

lease Validation Rule

Define a validation rule by specifying an error condition and a corresponding error message. The error condition is written as a Boolean formula expression that returns true or false. When the formula expression returns true, the save will be aborted and the error message will be displayed. The user can correct the error and try again.

Validation Rule Edit

Rule Name: lease_end_date

Active: ☑

Description:

Error Condition Formula

Example: Discount_Percent__c>0.30

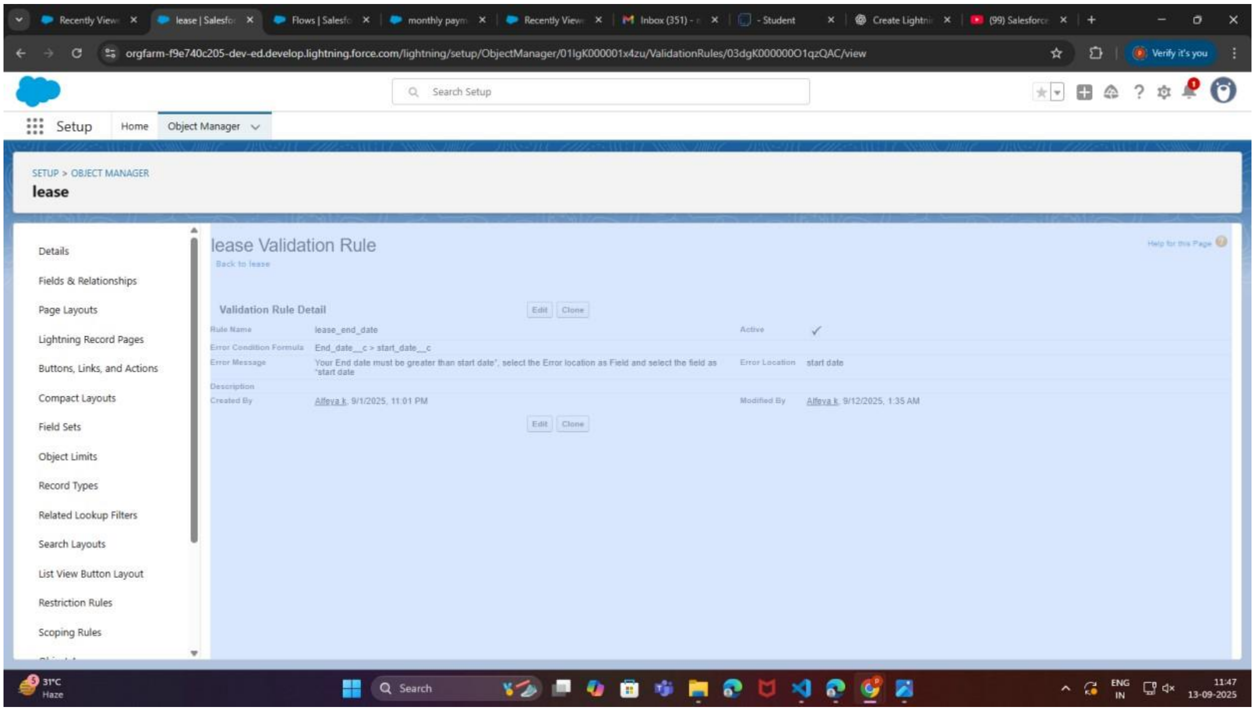
Display an error if Discount is more than 30%

If this formula expression is **true**, display the text defined in the Error Message area

```
End_date__c  >  start_date__c
```

ABS(number)

Returns the absolute value of a number, a number without its sign

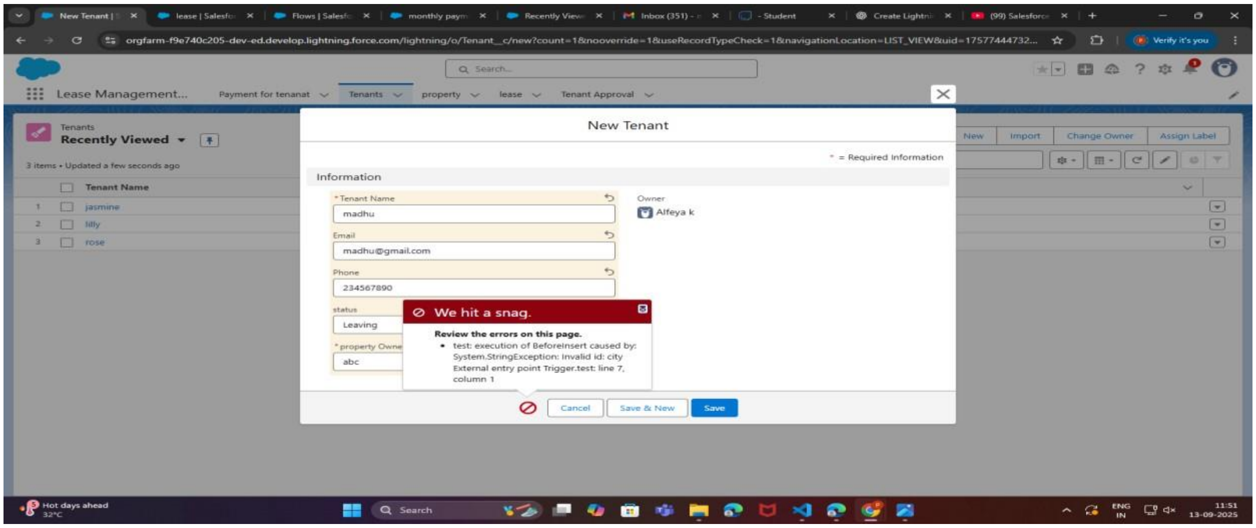

orgfarm-f9e740c205-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgK000001x4zu/ValidationRules/03dgK000000O1qzQAC/view
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
lease
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Help for this Page
Back to lease
Edit
Clone
31°C
Haze
Search
ENG
IN
11:47
13-09-2025

lease Validation Rule

Validation Rule Detail

Rule Name	lease_end_date	Active	✓
Error Condition Formula	End_date__c > start_date__c		
Error Message	Your End date must be greater than start date", select the Error location as Field and select the field as "start date	Error Location	start date
Description			
Created By	Alfeya k, 9/1/2025, 11:01 PM	Modified By	Alfeya k, 9/12/2025, 1:35 AM

- Added Apex trigger to restrict multiple tenants per property


New Tenant
* = Required Information
Information
Cancel
Save & New
Save

*Tenant Name: madhu

Email: madhu@gmail.com

Phone: 234567890

status: Leaving

*property Owner: abc

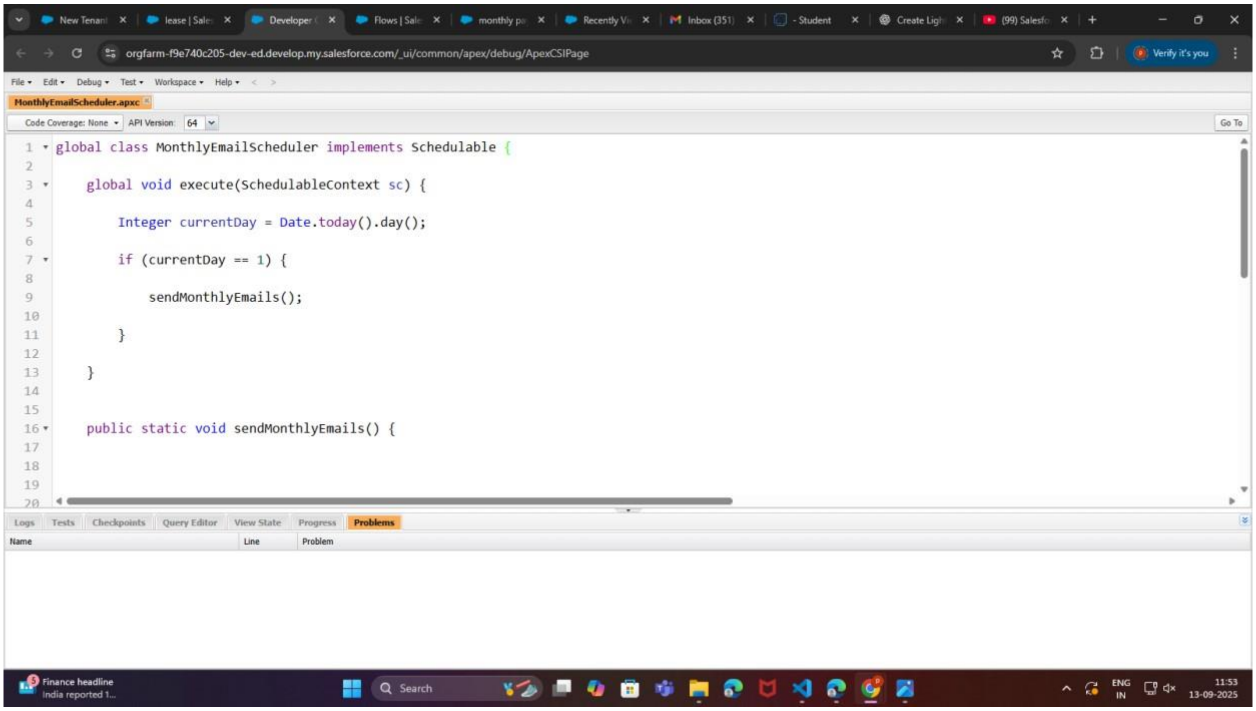
Owner: Alfeya k

We hit a snag.

Review the errors on this page.

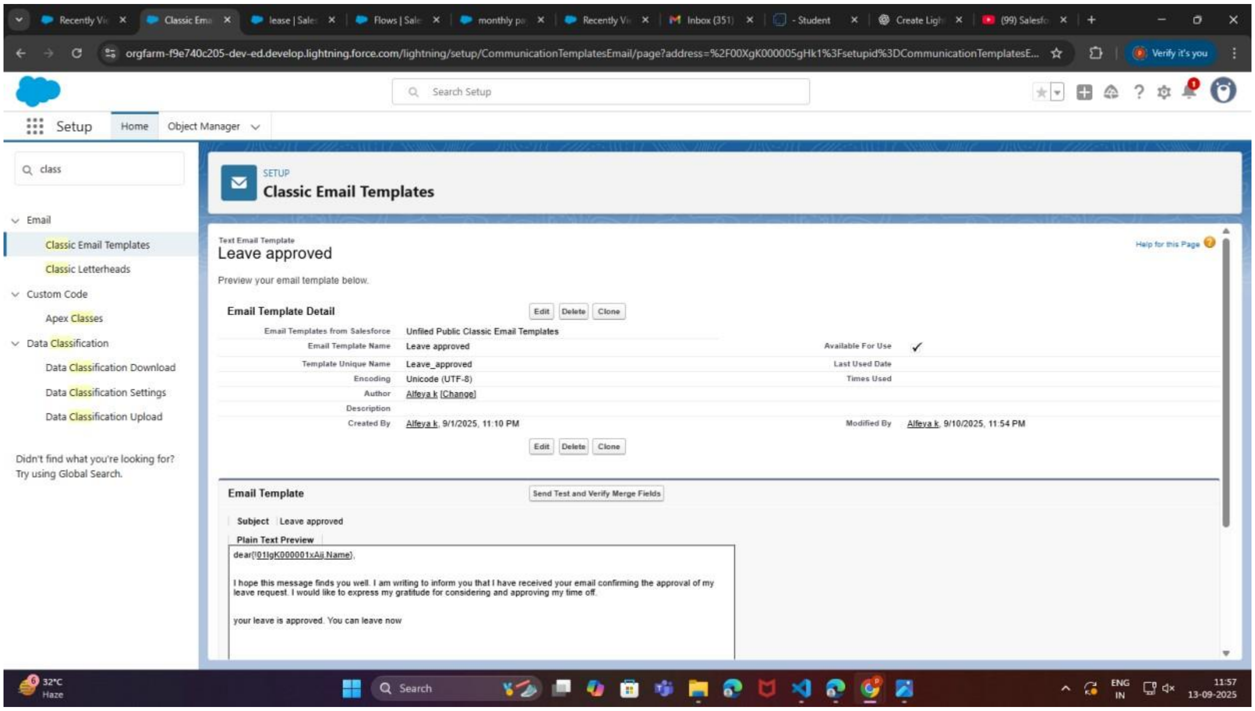
- test: execution of BeforeInsert caused by: System.StringException: Invalid id: city External entry point Trigger.test: line 7, column 1

- Scheduled monthly reminder emails using Apex class


MonthlyEmailScheduler.apxc
Code Coverage: None
API Version: 64
Logs
Tests
Checkpoints
Query Editor
View State
Progress
Problems
Name
Line
Problem

```
global class MonthlyEmailScheduler implements Schedulable {

    global void execute(SchedulableContext sc) {

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

        if (currentDay == 1) {

            sendMonthlyEmails();

        }

    }


    public static void sendMonthlyEmails() {
```

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


orgfarm-f9e740c205-dev-ed.develop.lightning.force.com/lightning/setup/CommunicationTemplatesEmail/page?address=%2F00XgK000005gHk1%3Fsetupid%3DCommunicationTemplatesE...
Search Setup
Setup
Home
Object Manager
class
Email
Classic Email Templates
Classic Letterheads
Custom Code
Apex Classes
Data Classification
Data Classification Download
Data Classification Settings
Data Classification Upload
Didn't find what you're looking for? Try using Global Search.
SETUP
Classic Email Templates
Help for this Page
Edit
Delete
Clone
Send Test and Verify Merge Fields
32°C Haze
Search
11:57 13-09-2025

Text Email Template

Leave approved

Preview your email template below.

Email Template Detail

Email Templates from Salesforce	Unfiled 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	Alfeya k [Change]		
Description			
Created By	Alfeya k, 9/1/2025, 11:10 PM	Modified By	Alfeya k, 9/10/2025, 11:54 PM

Email Template

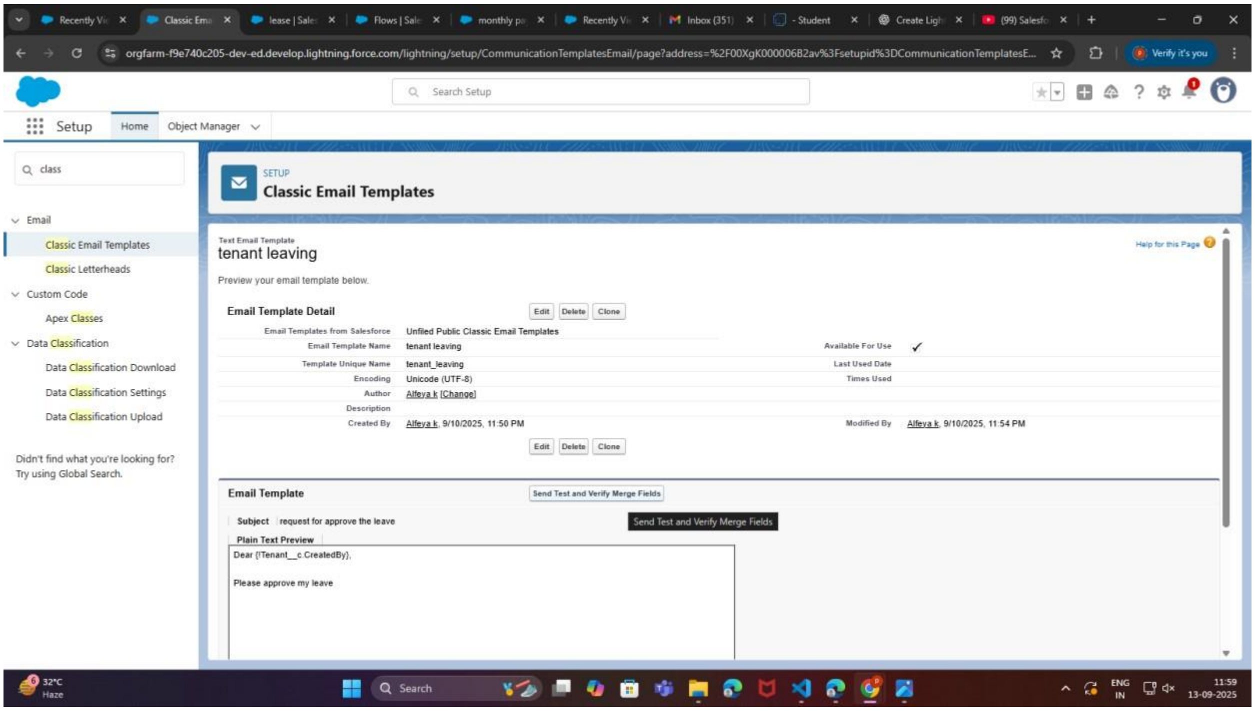
Subject Leave approved

Plain Text Preview

dear{!01IgK000001xAij.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


orgfarm-f9e740c205-dev-ed.develop.lightning.force.com/lightning/setup/CommunicationTemplatesEmail/page?address=%2F00XgK000006B2av%3Fsetupid%3DCommunicationTemplatesE...
Search Setup
Setup
Home
Object Manager
class
Email
Classic Email Templates
Classic Letterheads
Custom Code
Apex Classes
Data Classification
Data Classification Download
Data Classification Settings
Data Classification Upload
Didn't find what you're looking for? Try using Global Search.
SETUP
Classic Email Templates
Help for this Page
Edit
Delete
Clone
Send Test and Verify Merge Fields
Send Test and Verify Merge Fields
32°C Haze
Search
11:59 13-09-2025

Text Email Template

tenant leaving

Preview your email template below.

Email Template Detail

Email Templates from Salesforce	Unfiled 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	Alfeya k [Change]		
Description			
Created By	Alfeya k, 9/10/2025, 11:50 PM	Modified By	Alfeya k, 9/10/2025, 11:54 PM

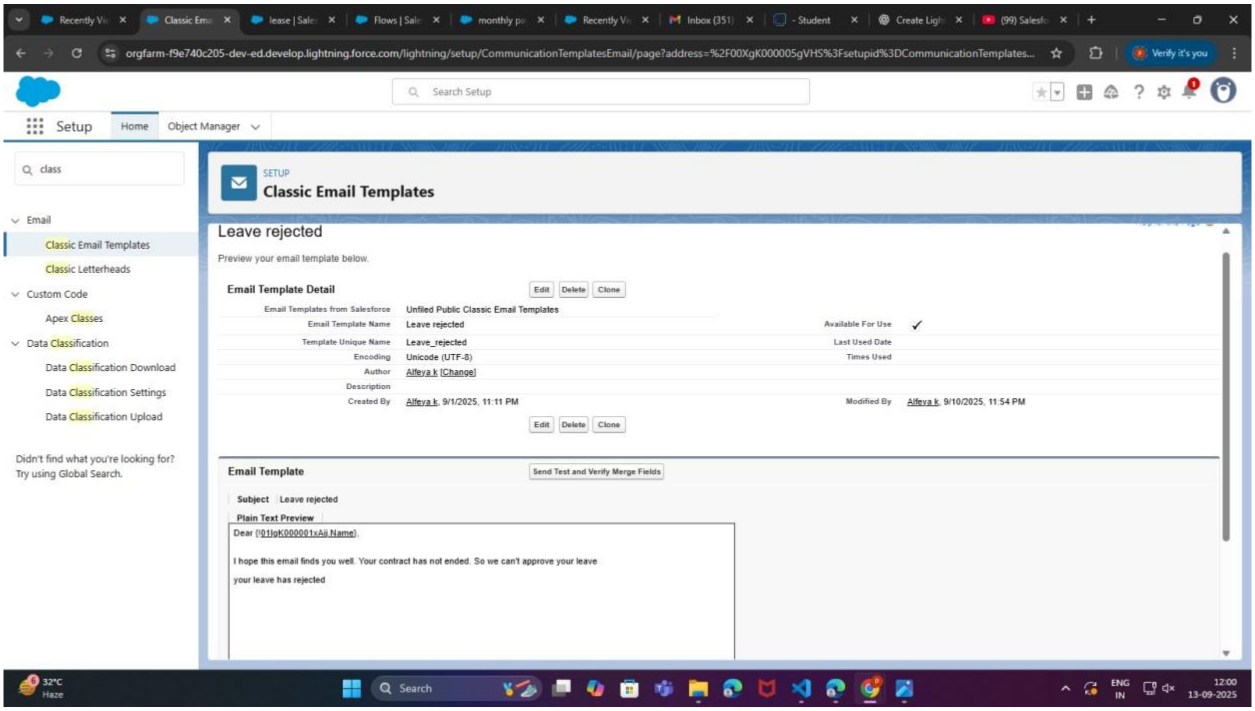
Email Template

Subject request for approve the leave

Plain Text Preview

Dear {!Tenant__c.CreatedBy},

Please approve my leave


Recently Vi
Classic Ema
lease | Sale
Flows | Sale
monthly pa
Recently Vi
Inbox (351)
- Student
Create Ligh
(99) Salesfo
Verify it's you
Search Setup
Setup
Home
Object Manager
class
Email
Classic Email Templates
Classic Letterheads
Custom Code
Apex Classes
Data Classification
Data Classification Download
Data Classification Settings
Data Classification Upload
Didn't find what you're looking for? Try using Global Search.
Edit
Delete
Clone
Send Test and Verify Merge Fields
32°C
Haze
Search
ENG
IN
12:00
13-09-2025

orgfarm-f9e740c205-dev-ed.develop.lightning.force.com/lightning/setup/CommunicationTemplatesEmail/page?address=%2F00XgK000005gVHS%3Fsetupid%3DCommunicationTemplates...

SETUP

Classic Email Templates

Leave rejected

Preview your email template below.

Email Template Detail

Email Templates from Salesforce: Unfiled Public Classic Email Templates
Email Template Name: Leave rejected
Available For Use: ✓
Template Unique Name: Leave_rejected
Last Used Date:
Encoding: Unicode (UTF-8)
Times Used:
Author: Alfeya k [Change]
Description:
Created By: Alfeya k, 9/1/2025, 11:11 PM
Modified By: Alfeya k, 9/10/2025, 11:54 PM

Email Template

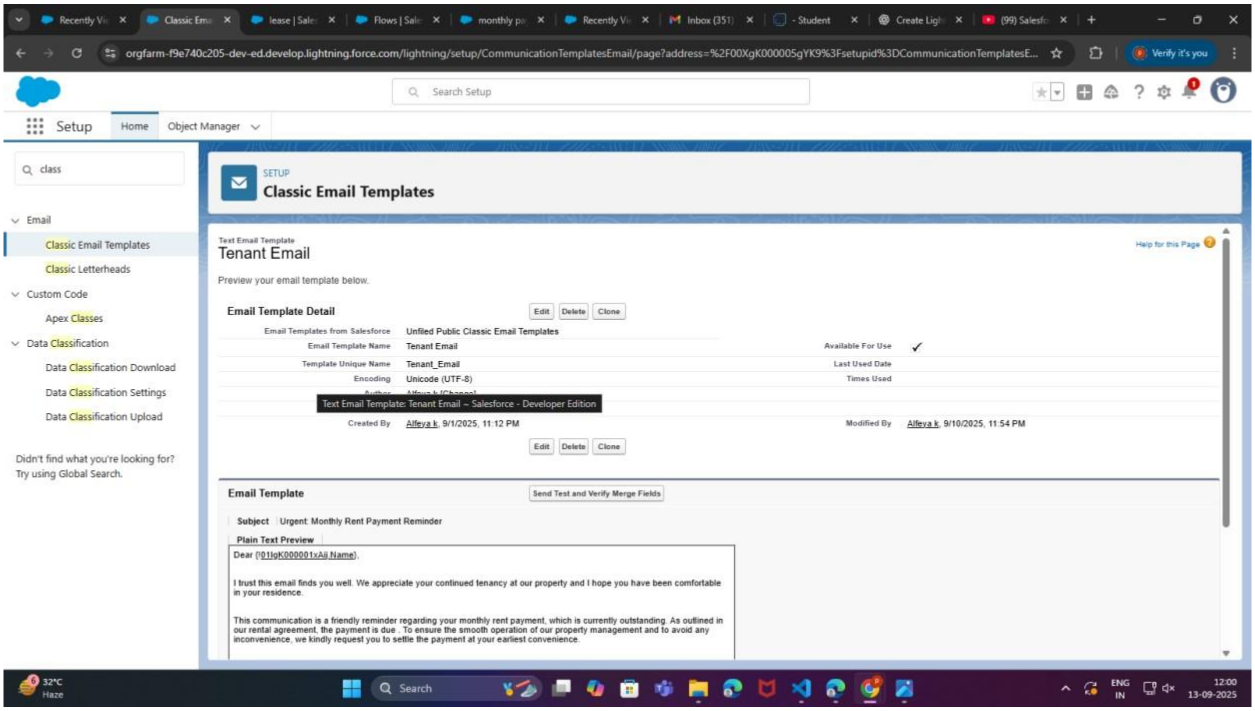
Subject: Leave rejected

Plain Text Preview

Dear {!01IgK000001xAij.Name},

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

your leave has rejected


Recently Vi
Classic Ema
lease | Sale
Flows | Sale
monthly pa
Recently Vi
Inbox (351)
- Student
Create Ligh
(99) Salesfo
Verify it's you
Search Setup
Setup
Home
Object Manager
class
Email
Classic Email Templates
Classic Letterheads
Custom Code
Apex Classes
Data Classification
Data Classification Download
Data Classification Settings
Data Classification Upload
Didn't find what you're looking for? Try using Global Search.
Help for this Page
Edit
Delete
Clone
Text Email Template: Tenant Email ~ Salesforce - Developer Edition
Send Test and Verify Merge Fields
32°C
Haze
Search
ENG
IN
12:00
13-09-2025

orgfarm-f9e740c205-dev-ed.develop.lightning.force.com/lightning/setup/CommunicationTemplatesEmail/page?address=%2F00XgK000005gYK9%3Fsetupid%3DCommunicationTemplatesE...

SETUP

Classic Email Templates

Text Email Template

Tenant Email

Preview your email template below.

Email Template Detail

Email Templates from Salesforce: Unfiled 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:
Created By: Alfeya k, 9/1/2025, 11:12 PM
Modified By: Alfeya k, 9/10/2025, 11:54 PM

Email Template

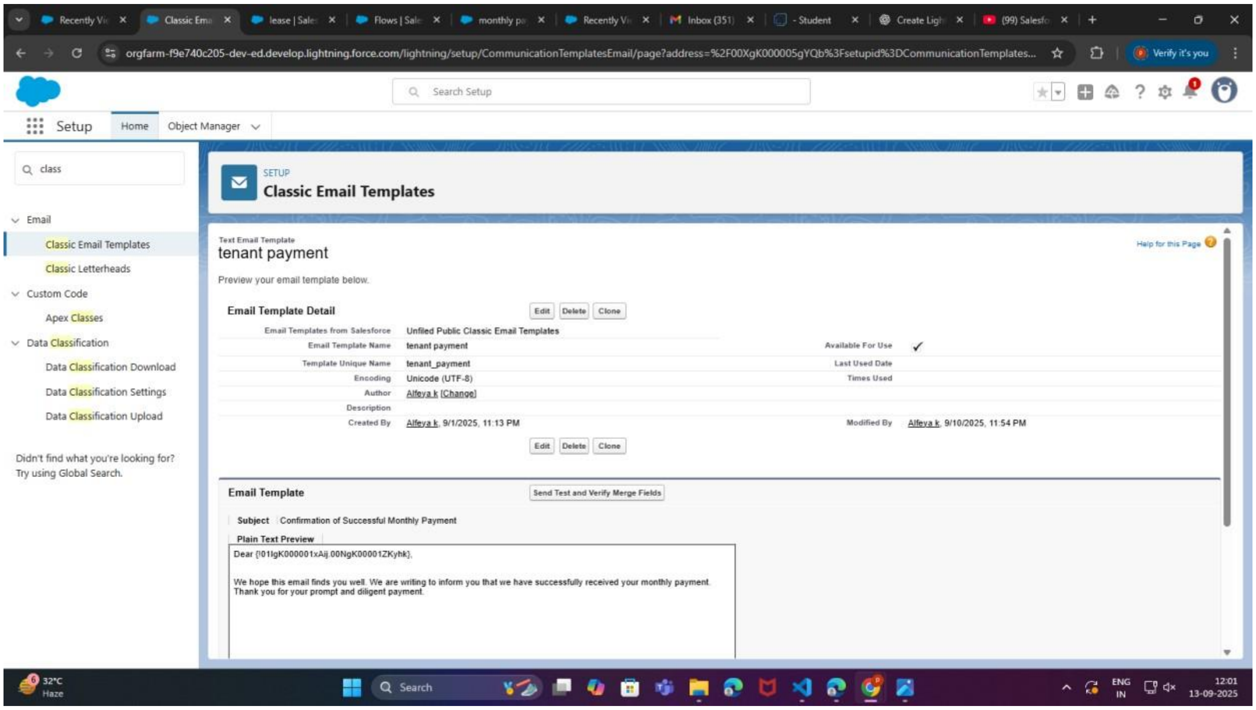
Subject: Urgent: Monthly Rent Payment Reminder

Plain Text Preview

Dear {!01IgK000001xAij.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 our rental agreement, the payment is due . To ensure the smooth operation of our property management and to avoid any inconvenience, we kindly request you to settle the payment at your earliest convenience.


orgfarm-f9e740c205-dev-ed.develop.lightning.force.com/lightning/setup/CommunicationTemplatesEmail/page?address=%2F00XgK000005gYQb%3Fsetupid%3DCommunicationTemplates...
Setup
Home
Object Manager
class
Email
Classic Email Templates
Classic Letterheads
Custom Code
Apex Classes
Data Classification
Data Classification Download
Data Classification Settings
Data Classification Upload
Didn't find what you're looking for? Try using Global Search.
SETUP
Help for this Page
Edit
Delete
Clone
Send Test and Verify Merge Fields

Classic Email Templates

Text Email Template

tenant payment

Preview your email template below.

Email Template Detail

Email Templates from Salesforce	Unfiled 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	Alfeya k [Change]		
Description			
Created By	Alfeya k, 9/1/2025, 11:13 PM	Modified By	Alfeya k, 9/10/2025, 11:54 PM

Email Template

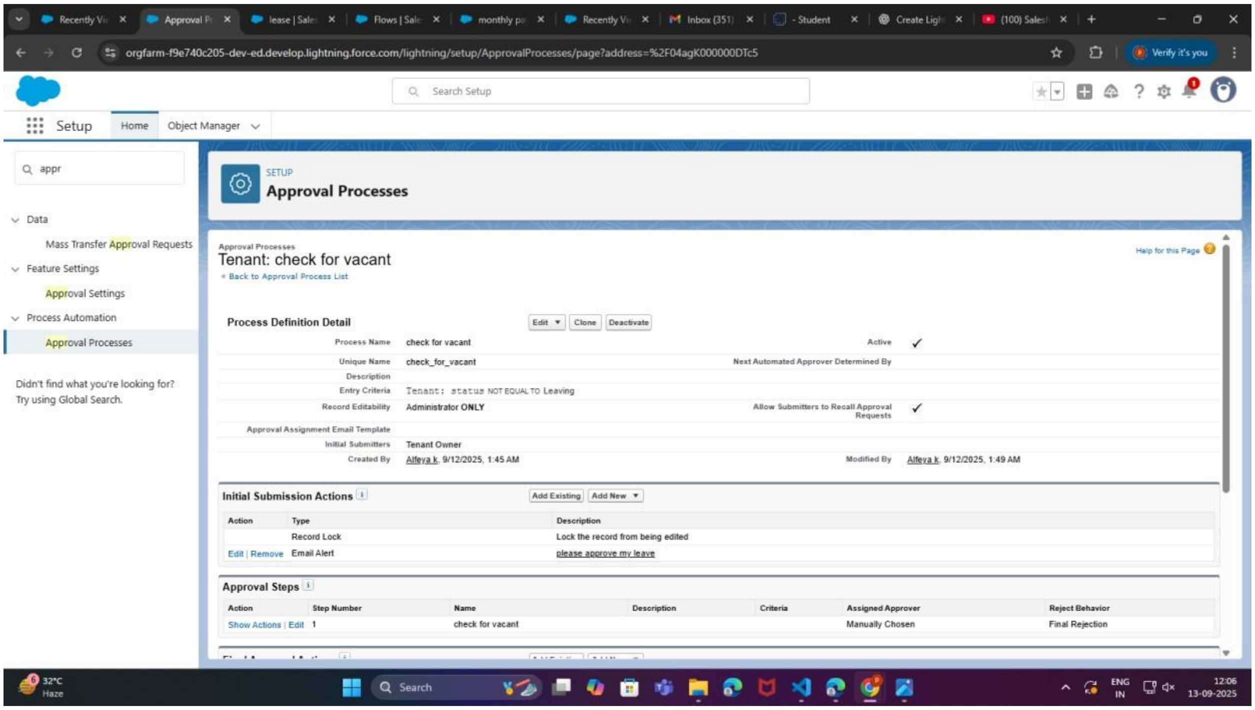
Subject Confirmation of Successful Monthly Payment

Plain Text Preview

Dear {!01IgK000001xAij.00NgK00001ZKyhk},

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:


orgfarm-f9e740c205-dev-ed.develop.lightning.force.com/lightning/setup/ApprovalProcesses/page?address=%2F04agK000000DTc5
Setup
Home
Object Manager
appr
Data
Mass Transfer Approval Requests
Feature Settings
Approval Settings
Process Automation
Approval Processes
Didn't find what you're looking for? Try using Global Search.
SETUP
Help for this Page
« Back to Approval Process List
Edit
Clone
Deactivate
Add Existing
Add New

Approval Processes

Approval Processes

Tenant: check for vacant

Process Definition Detail

Process Name	check for vacant	Active	✓
Unique Name	check_for_vacant	Next Automated Approver Determined By	
Description			
Entry Criteria	Tenant: status NOT EQUAL TO Leaving		
Record Editability	Administrator ONLY	Allow Submitters to Recall Approval Requests	✓
Approval Assignment Email Template			
Initial Submitters	Tenant Owner		
Created By	Alfeya k, 9/12/2025, 1:45 AM	Modified By	Alfeya k, 9/12/2025, 1:49 AM

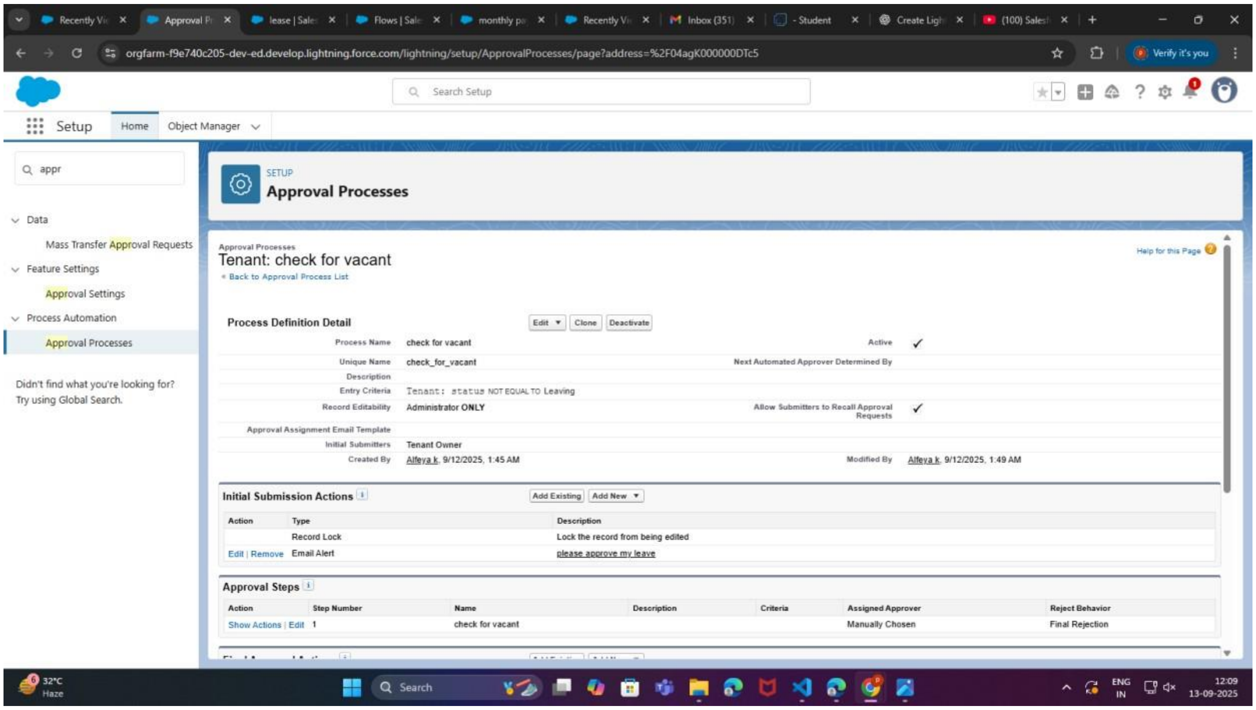
Initial Submission Actions

Action	Type	Description
	Record Lock	Lock the record from being edited
Edit | Remove	Email Alert	please approve my leave

Approval Steps

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Show Actions | Edit	1	check for vacant			Manually Chosen	Final Rejection

For Check for Vacant:



Setup
Home
Object Manager
Search Setup
appr
Data
Mass Transfer Approval Requests
Feature Settings
Approval Settings
Process Automation
Approval Processes
Didn't find what you're looking for? Try using Global Search.
SETUP
Approval Processes
Approval Processes
Help for this Page
« Back to Approval Process List
Edit
Clone
Deactivate
Add Existing
Add New

Tenant: check for vacant

Process Definition Detail

Process Name	check for vacant	Active	✓
Unique Name	check_for_vacant	Next Automated Approver Determined By	
Description			
Entry Criteria	Tenant: status NOT EQUAL TO Leaving		
Record Editability	Administrator ONLY	Allow Submitters to Recall Approval Requests	✓
Approval Assignment Email Template			
Initial Submitters	Tenant Owner		
Created By	Alfeya k, 9/12/2025, 1:45 AM	Modified By	Alfeya k, 9/12/2025, 1:49 AM

Initial Submission Actions

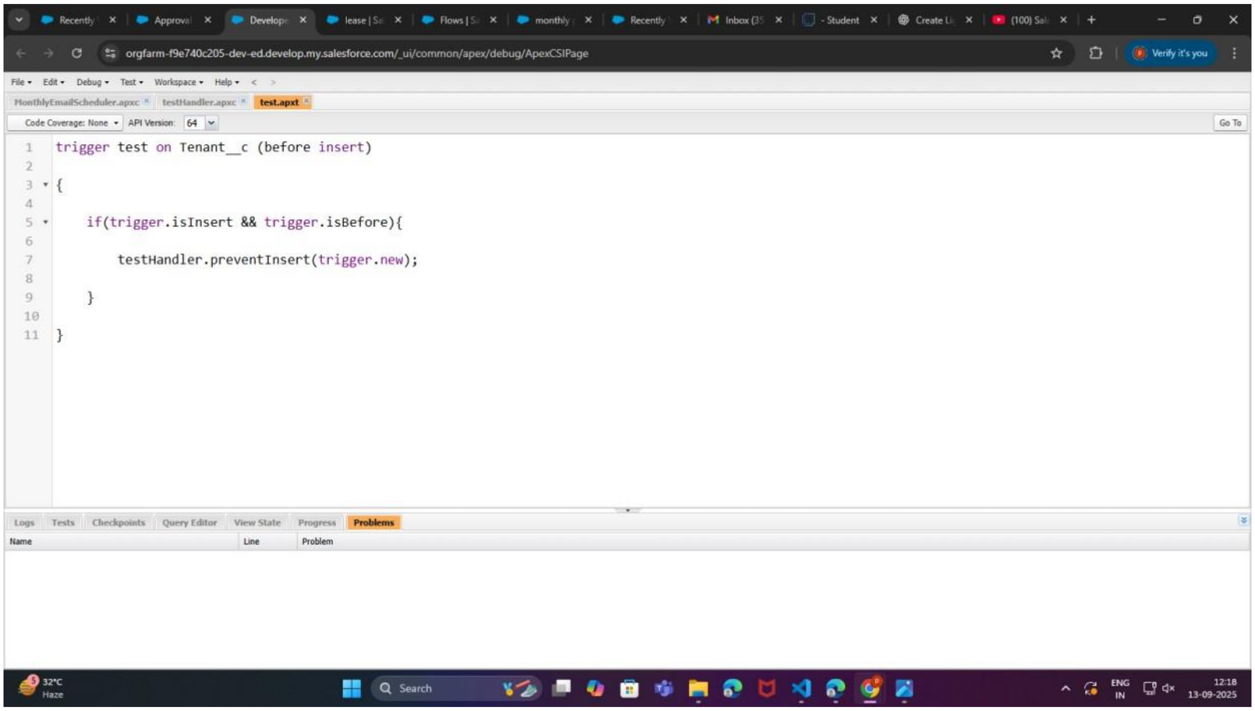
Action	Type	Description
	Record Lock	Lock the record from being edited
Edit | Remove	Email Alert	please approve my leave

Approval Steps

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Show Actions | Edit	1	check for vacant			Manually Chosen	Final Rejection

- Apex Trigger

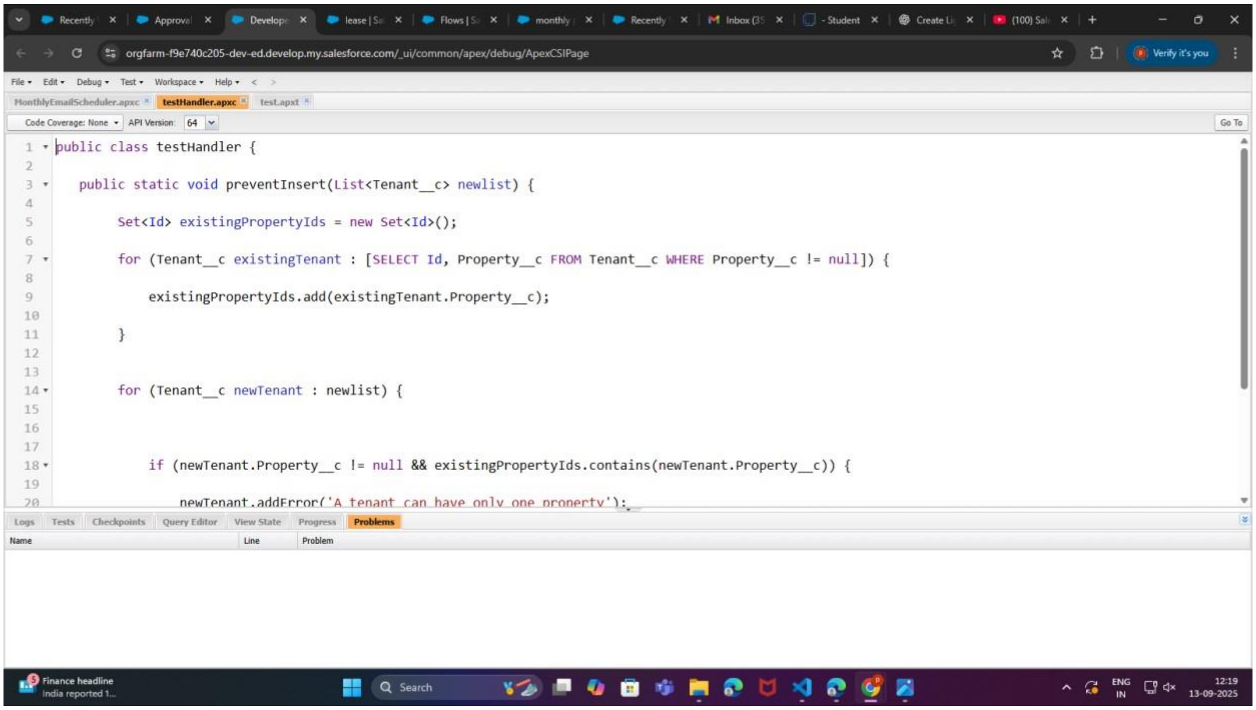
Create an Apex Trigger



File
Edit
Debug
Test
Workspace
Help
MonthlyEmailScheduler.apxc
testHandler.apxc
test.apxt
Code Coverage: None
API Version: 64
Go To
Logs
Tests
Checkpoints
Query Editor
View State
Progress
Problems
Name
Line
Problem

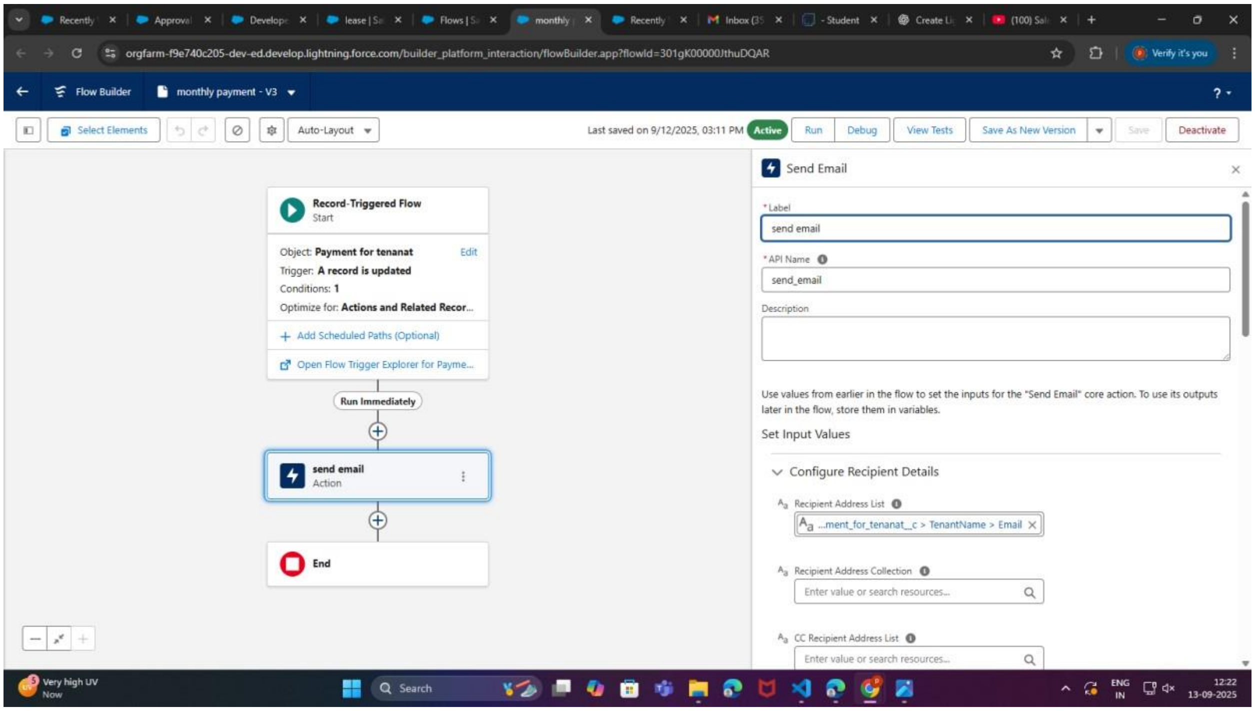
```
trigger test on Tenant__c (before insert)

{

    if(trigger.isInsert && trigger.isBefore){

        testHandler.preventInsert(trigger.new);

    }

}
```

Create an Apex Handler class


orgfarm-f9e740c205-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage
File Edit Debug Test Workspace Help
MonthlyEmailScheduler.apxc
testHandler.apxc
test.apxt
Code Coverage: None
API Version: 64
Logs Tests Checkpoints Query Editor View State Progress Problems
Name Line Problem

```
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');
```

- FLOWS


orgfarm-f9e740c205-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=301gK00000JthuDQAR
Flow Builder
monthly payment - V3
Select Elements
Auto-Layout
Active
Run
Debug
View Tests
Save As New Version
Save
Deactivate
Record-Triggered Flow
Start
Edit
Add Scheduled Paths (Optional)
Open Flow Trigger Explorer for Payme...
Run Immediately
send email
Action
End

Last saved on 9/12/2025, 03:11 PM

Object: **Payment for tenanat**
Trigger: **A record is updated**
Conditions: **1**
Optimize for: **Actions and Related Recor...**

Send Email

*Label: send email

*API Name: send_email

Description:

Use values from earlier in the flow to set the inputs for the "Send Email" core action. To use its outputs later in the flow, store them in variables.

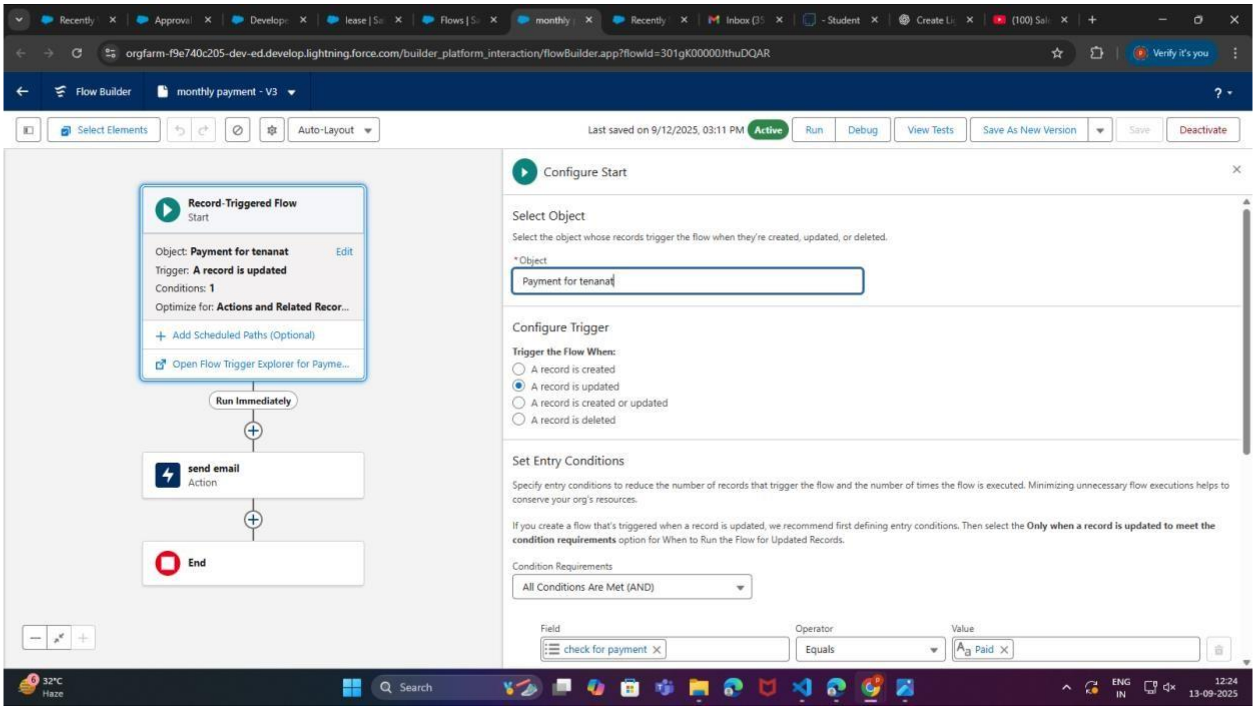
Set Input Values

Configure Recipient Details

Recipient Address List: ...ment_for_tenanat__c > TenantName > Email

Recipient Address Collection: Enter value or search resources...

CC Recipient Address List: Enter value or search resources...


orgfarm-f9e740c205-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=301gK00000JthuDQAR
Flow Builder
monthly payment - V3
Select Elements
Auto-Layout
Last saved on 9/12/2025, 03:11 PM
Active
Run
Debug
View Tests
Save As New Version
Save
Deactivate
Record-Triggered Flow
Start
Edit
Add Scheduled Paths (Optional)
Open Flow Trigger Explorer for Payme...
Run Immediately
send email
Action
End
Configure Start

Object: **Payment for tenanat**

Trigger: **A record is updated**

Conditions: **1**

Optimize for: **Actions and Related Recor...**

Select Object

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

* Object: Payment for tenanat

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.

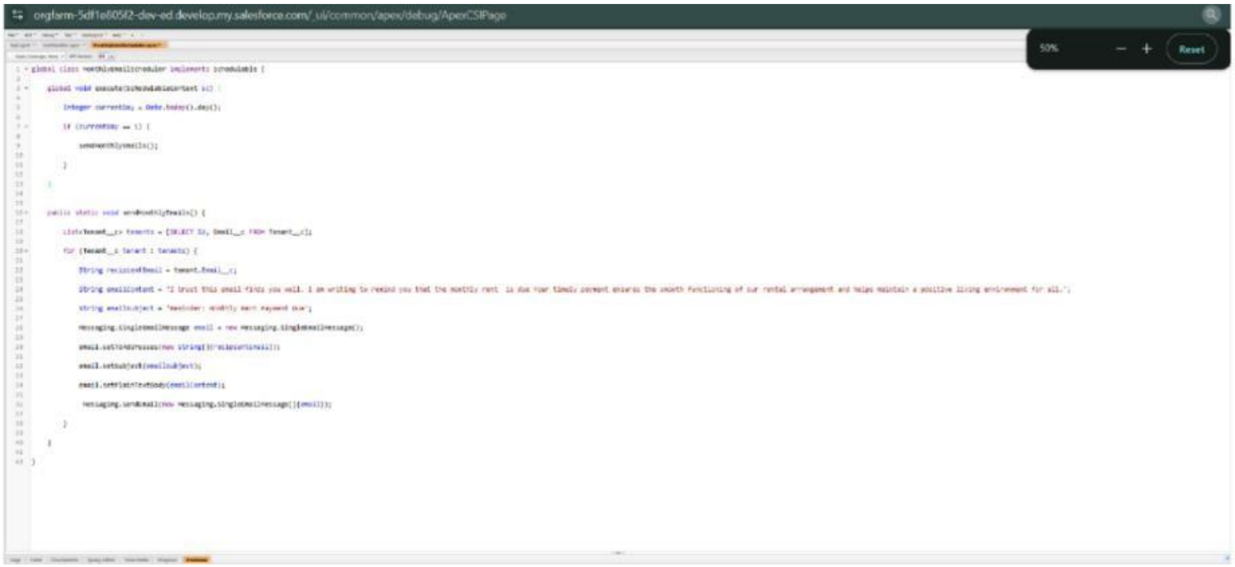
If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements: All Conditions Are Met (AND)

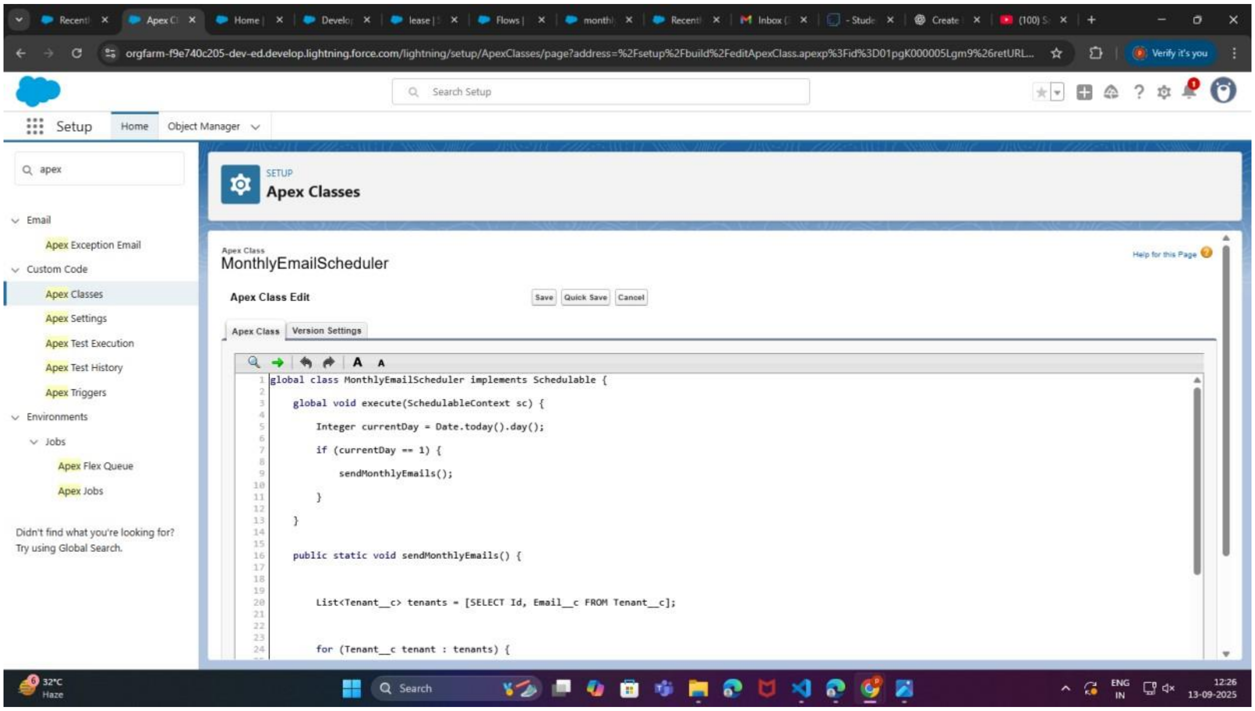
Field	Operator	Value
check for payment	Equals	Paid

● Schedule class:

Create an Apex Class

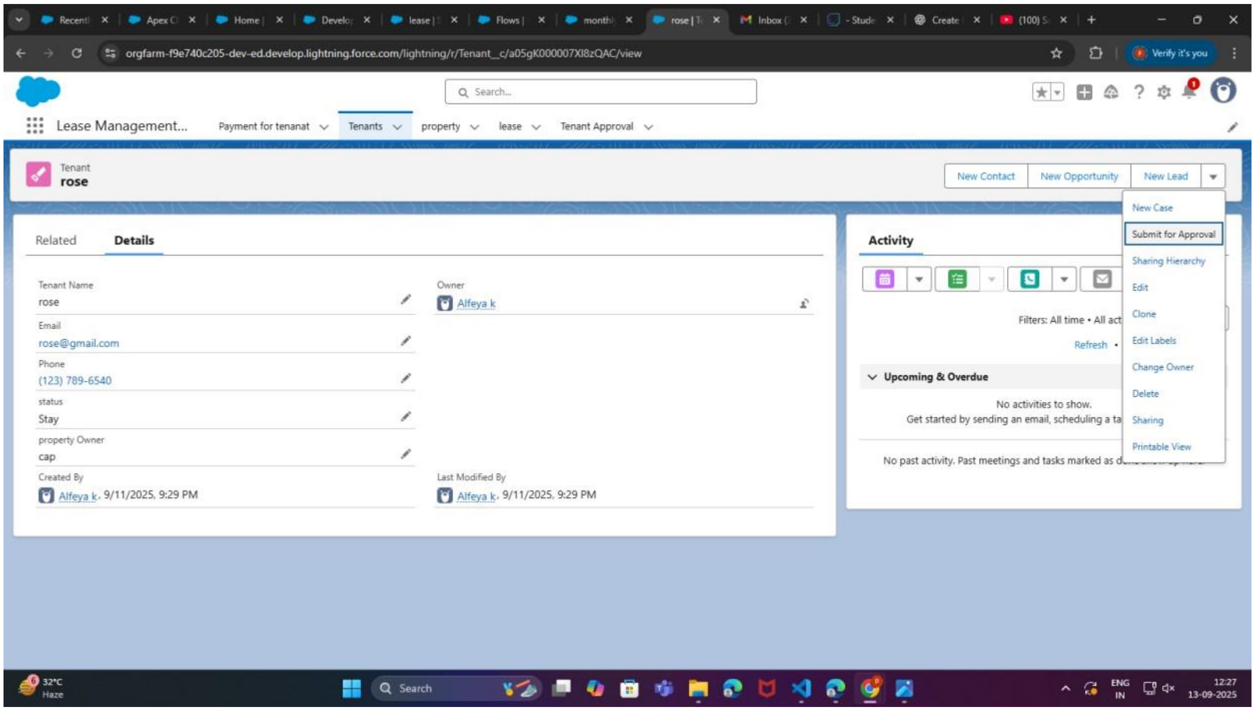

orgfarm-5df1e805f2-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage
50%
Reset

Schedule Apex class



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
Didn't find what you're looking for? Try using Global Search.
SETUP
Apex Classes
Apex Class
MonthlyEmailScheduler
Help for this Page
Apex Class Edit
Save
Quick Save
Cancel
Apex Class
Version Settings

```
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) {
```



Lease Management...
Payment for tenanat
Tenants
property
lease
Tenant Approval
Tenant
rose
New Contact
New Opportunity
New Lead
New Case
Submit for Approval
Sharing Hierarchy
Edit
Clone
Edit Labels
Change Owner
Delete
Sharing
Printable View
Related
Details
Activity
Filters: All time • All act
Refresh
Upcoming & Overdue
No activities to show.
Get started by sending an email, scheduling a ta
No past activity. Past meetings and tasks marked as d

Tenant Name: rose

Email: rose@gmail.com

Phone: (123) 789-6540

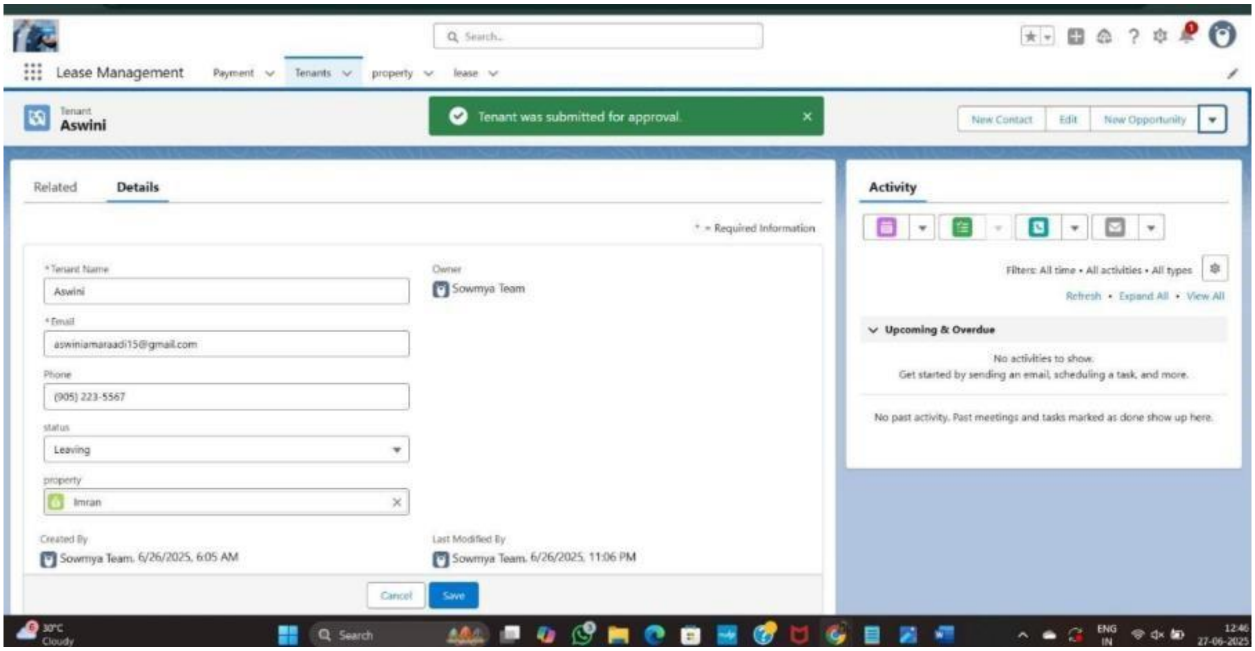
status: Stay

property Owner: cap

Created By: Alfeya k, 9/11/2025, 9:29 PM

Owner: Alfeya k

Last Modified By: Alfeya k, 9/11/2025, 9:29 PM


Lease Management
Payment
Tenants
property
lease
New Contact
Edit
New Opportunity
Related
Details
Activity
Cancel
Save

Tenant
Aswini

Tenant was submitted for approval.

* = Required Information

*Tenant Name: Aswini

*Email: aswiniamaraadi15@gmail.com

Phone: (905) 223-5567

status: Leaving

property: Imran

Owner: Sowmya Team

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

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

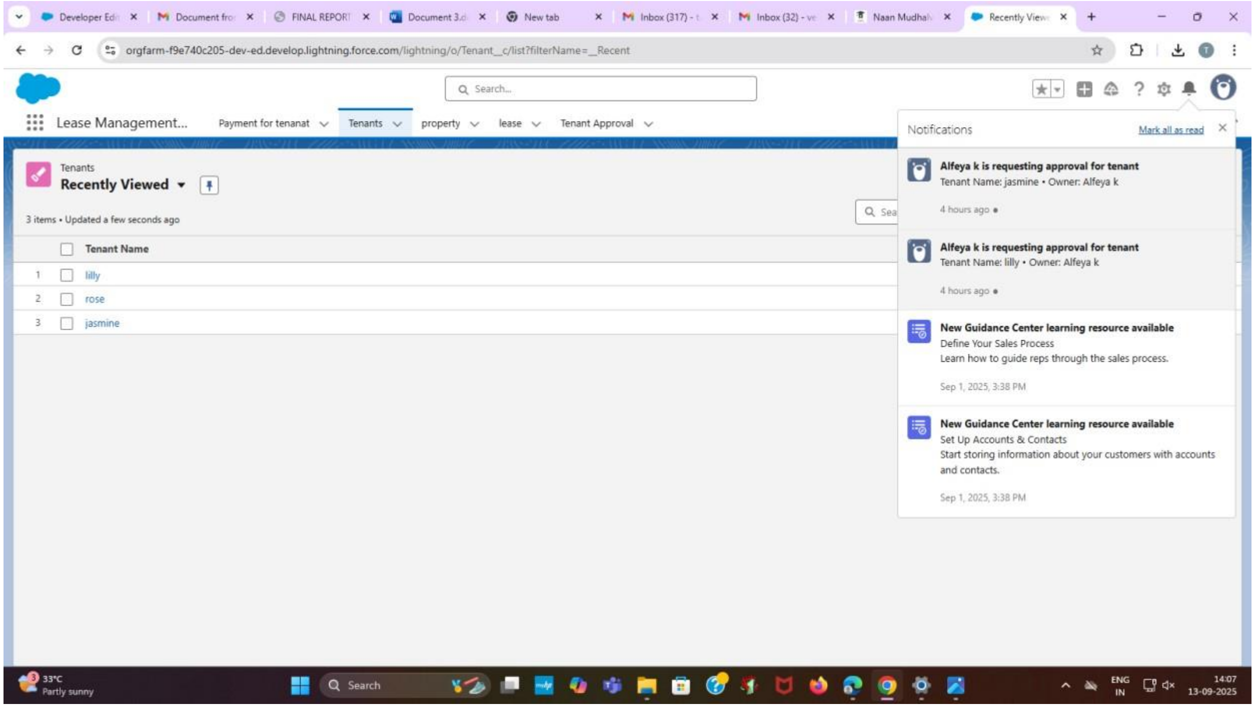
Filters: All time • All activities • All types

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.


Developer Edi
Document fro
FINAL REPORT
Document 3.d
New tab
Inbox (317)
Inbox (32)
Naan Mudhal
Recently View
Lease Management...
Payment for tenanat
Tenants
property
lease
Tenant Approval

orgfarm-f9e740c205-dev-ed.develop.lightning.force.com/lightning/o/Tenant__c/list?filterName=__Recent

Tenants
Recently Viewed

3 items • Updated a few seconds ago

	Tenant Name
1	lilly
2	rose
3	jasmine

Notifications — Mark all as read

Alfeya k is requesting approval for tenant
Tenant Name: jasmine • Owner: Alfeya k
4 hours ago

Alfeya k is requesting approval for tenant
Tenant Name: lilly • Owner: Alfeya k
4 hours ago

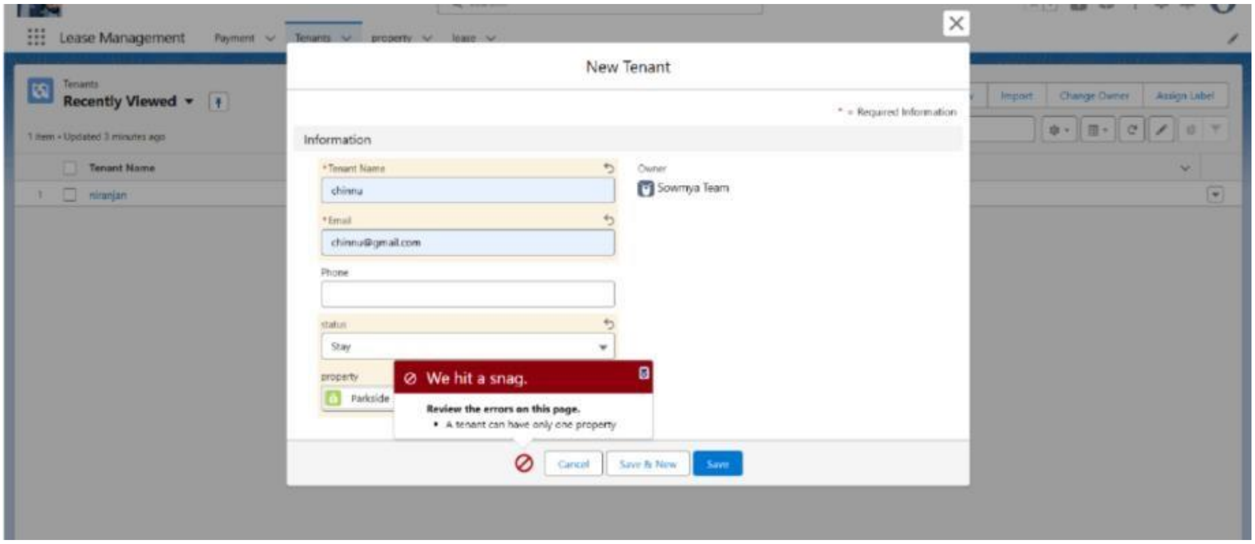
New Guidance Center learning resource available
Define Your Sales Process
Learn how to guide reps through the sales process.
Sep 1, 2025, 3:38 PM

New Guidance Center learning resource available
Set Up Accounts & Contacts
Start storing information about your customers with accounts and contacts.
Sep 1, 2025, 3:38 PM

FUNCTIONAL AND PERFORMANCE TESTING

Performance Testing

- Trigger validation by entering duplicate tenant-property records


Lease Management
Payment
Tenants
property
lease
Recently Viewed
Import
Change Owner
Assign Label
Cancel
Save & New
Save

Tenants

1 item • Updated 3 minutes ago

	Tenant Name
1	niranjan

New Tenant

* = Required Information

Information

*Tenant Name: chinnu

*Email: chinnu@gmail.com

Phone:

status: Stay

property: Parkside

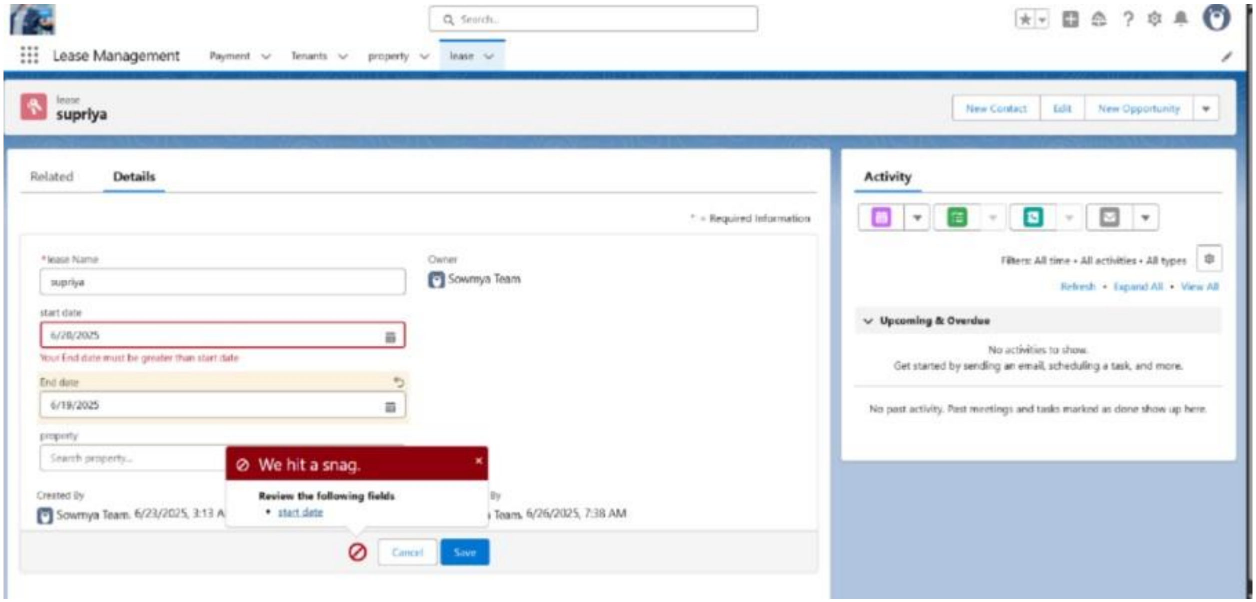
Owner: Sowmya Team

We hit a snag.

Review the errors on this page.

- A tenant can have only one property

- Validation Rule checking


Search...
Lease Management
Payment
Tenants
property
lease
New Contact
Edit
New Opportunity
Related
Details
Activity
Refresh
Expand All
View All
Cancel
Save

lease

supriya

* = Required Information

*lease Name: supriya

start date: 6/20/2025

Your End date must be greater than start date

End date: 6/19/2025

property: Search property...

Owner: Sowmya Team

Created By: Sowmya Team, 6/23/2025, 3:13 A

By: Team, 6/26/2025, 7:38 AM

We hit a snag.

Review the following fields

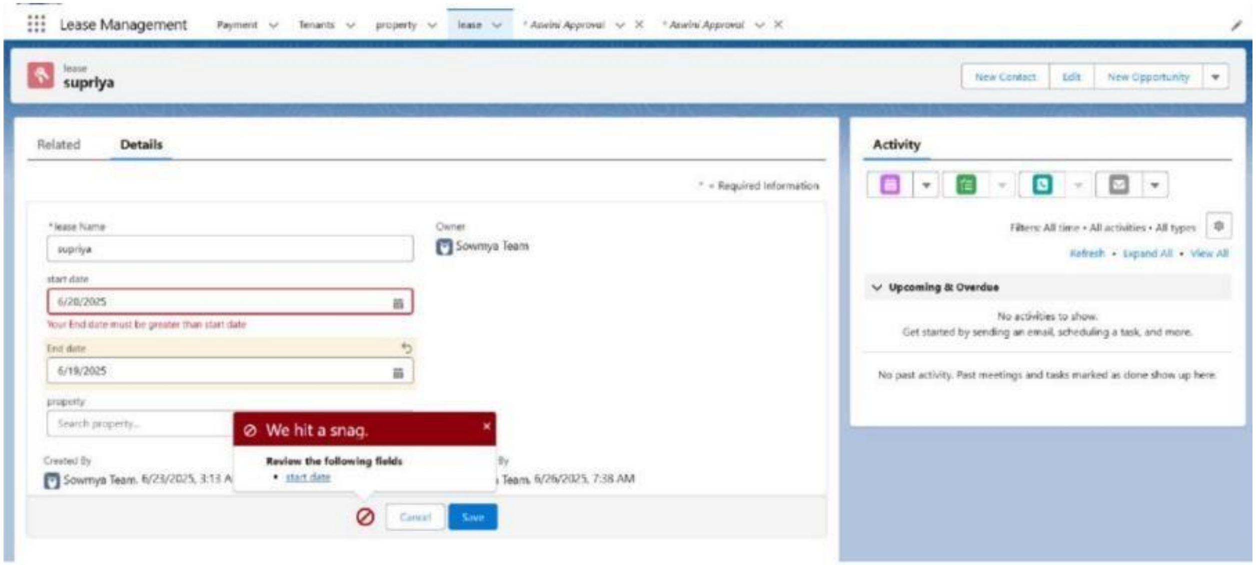
- start date

Filters: All time • All activities • All types

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 Approval
* Aswini Approval
New Contact
Edit
New Opportunity
Related
Details
Activity
Refresh
Expand All
View All
Cancel
Save

lease

supriya

* = Required Information

*lease Name: supriya

start date: 6/20/2025

Your End date must be greater than start date

End date: 6/19/2025

property: Search property...

Owner: Sowmya Team

Created By: Sowmya Team, 6/23/2025, 3:13 A

By: Team, 6/26/2025, 7:38 AM

We hit a snag.

Review the following fields

- start date

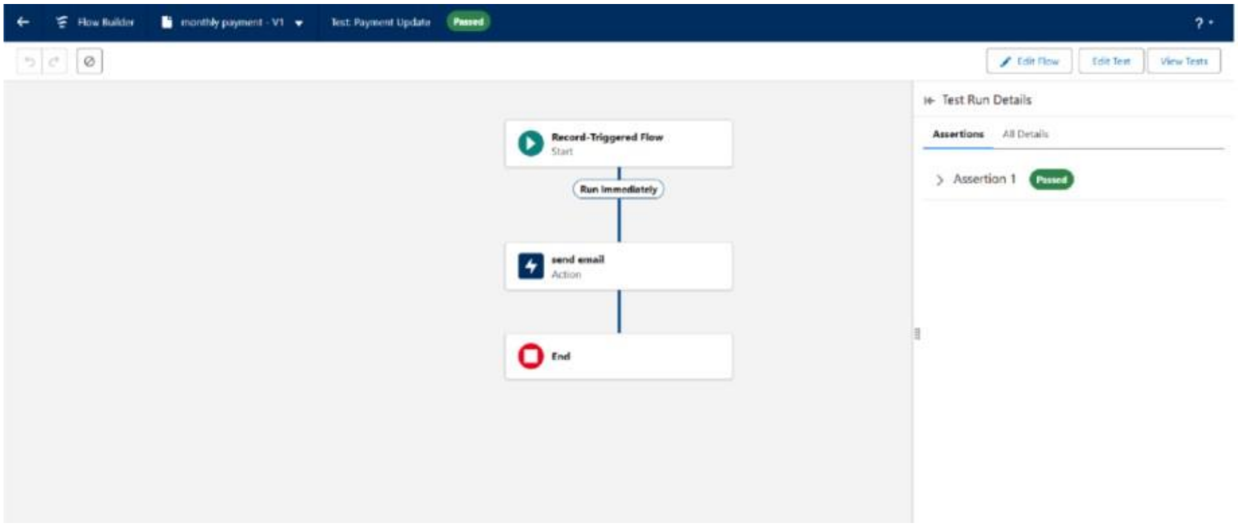
Filters: All time • All activities • All types

Upcoming & Overdue

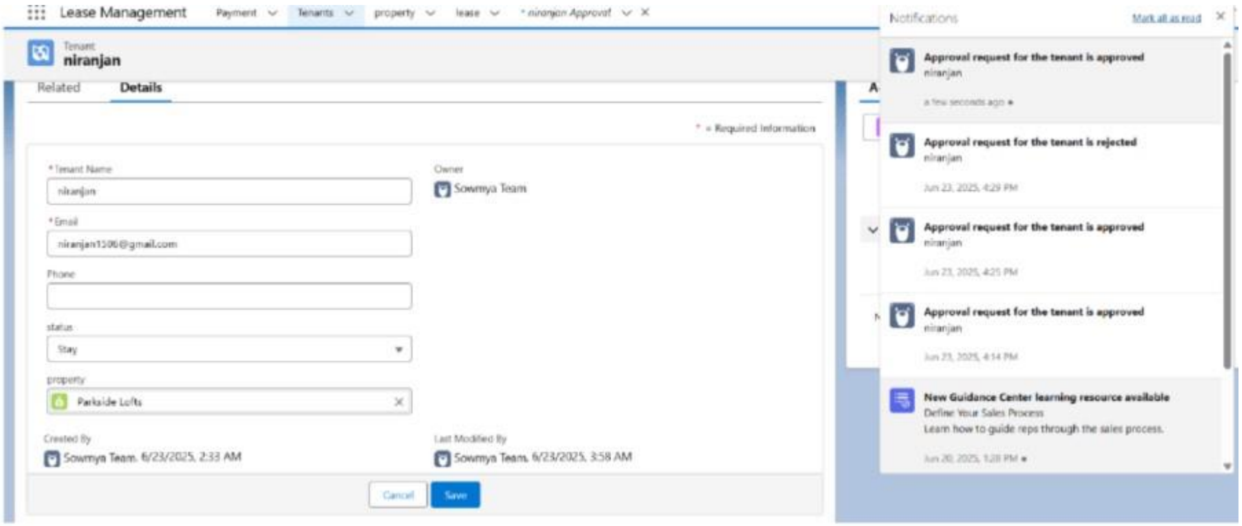
No activities to show.
Get started by sending an email, scheduling a task, and more.

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

- Test flows on payment update


Flow Builder
monthly payment - V1
Test: Payment Update
Passed
Edit Flow
Edit Test
View Tests
Record-Triggered Flow
Start
Run Immediately
send email
Action
End
Test Run Details
Assertions
All Details
Assertion 1
Passed

- Approval process validated through email alerts and status updates


Lease Management
Payment
Tenants
property
lease
* niranjan Approval
Tenant
Related
Details
* = Required Information
Cancel
Save
Notifications
Mark all as read

niranjan

* Tenant Name	niranjan
* Email	niranjan1506@gmail.com
Phone	
status	Stay
property	Parkside Lofts
Owner	Sowmya Team
Created By	Sowmya Team, 6/23/2025, 2:33 AM
Last Modified By	Sowmya Team, 6/23/2025, 3:58 AM

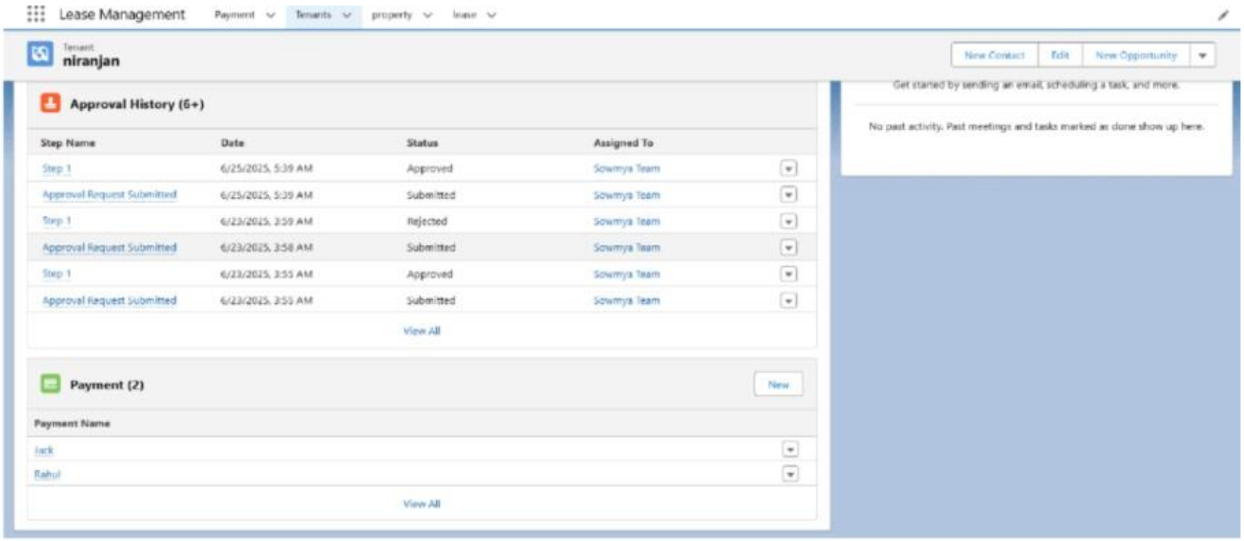
Approval request for the tenant is approved
niranjan
a few seconds ago

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
New Contact
Edit
New Opportunity
View All
New

niranjan

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	6/25/2025, 5:39 AM	Approved	Sowmya Team
Approval Request Submitted	6/25/2025, 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

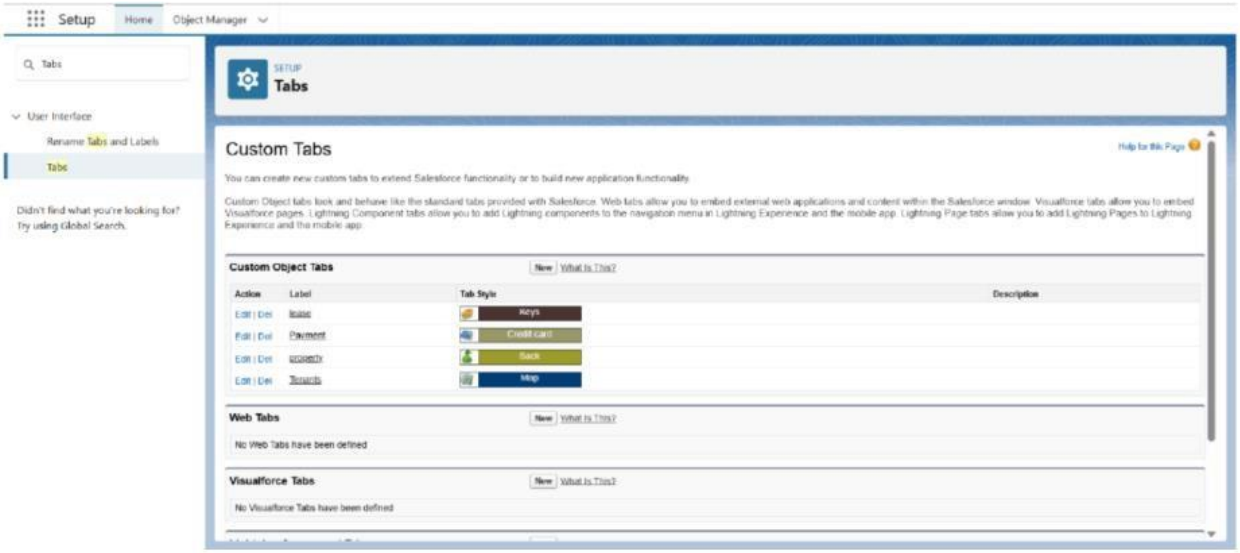
Payment (2)

Payment Name
Jack
Rahul

RESULTS

Output Screenshots

- Tabs for Property, Tenant, Lease, Payment



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

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs

Action	Label	Tab Style	Description
Edit | Del	lease	Keys	
Edit | Del	Payment	Credit card	
Edit | Del	property	Sack	
Edit | Del	Tenants	Map	

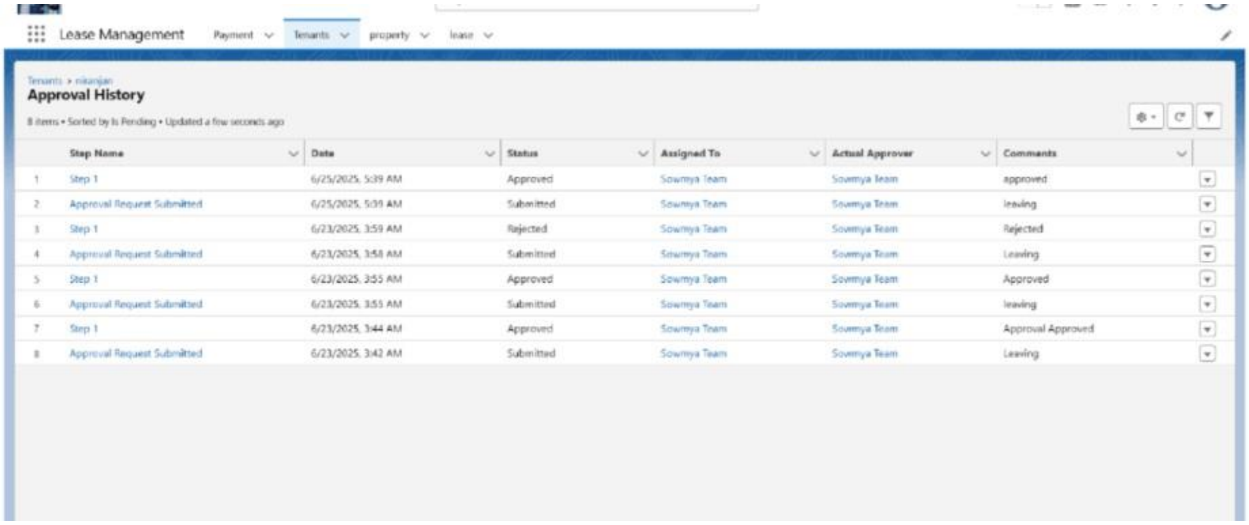
Web Tabs

No Web Tabs have been defined

Visualforce Tabs

No Visualforce Tabs have been defined

- Email alerts

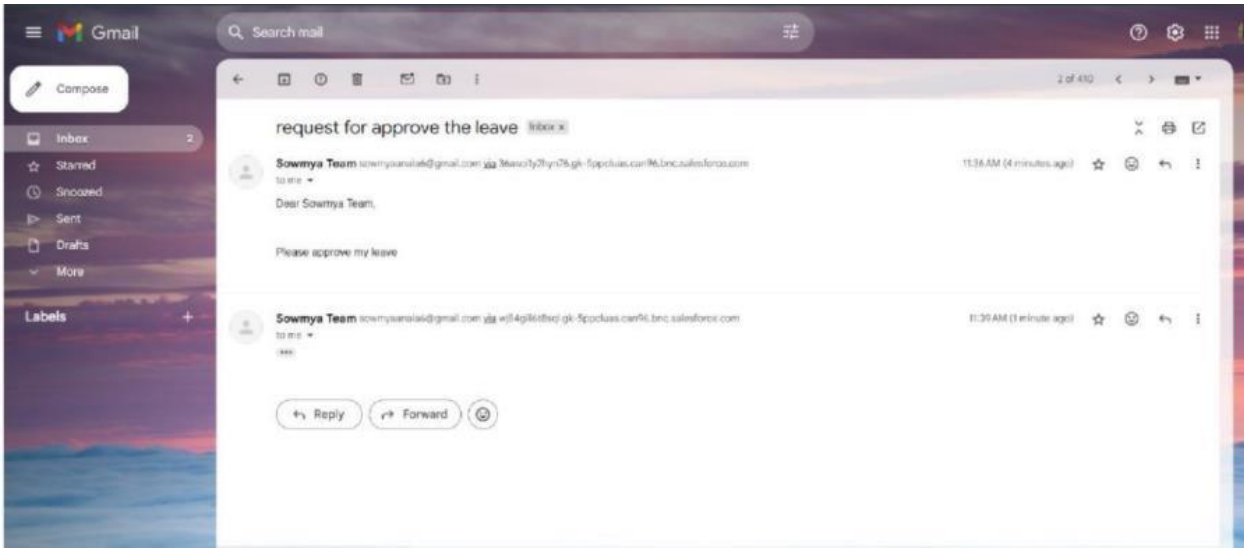


Approval History

8 items • Sorted by Is Pending • Updated a few seconds ago

	Step Name	Date	Status	Assigned To	Actual Approver	Comments
1	Step 1	6/25/2025, 5:39 AM	Approved	Sowmya Team	Sowmya Team	approved
2	Approval Request Submitted	6/25/2025, 5:39 AM	Submitted	Sowmya Team	Sowmya Team	leaving
3	Step 1	6/23/2025, 3:59 AM	Rejected	Sowmya Team	Sowmya Team	Rejected
4	Approval Request Submitted	6/23/2025, 3:58 AM	Submitted	Sowmya Team	Sowmya Team	Leaving
5	Step 1	6/23/2025, 3:55 AM	Approved	Sowmya Team	Sowmya Team	Approved
6	Approval Request Submitted	6/23/2025, 3:55 AM	Submitted	Sowmya Team	Sowmya Team	leaving
7	Step 1	6/23/2025, 3:44 AM	Approved	Sowmya Team	Sowmya Team	Approval Approved
8	Approval Request Submitted	6/23/2025, 3:42 AM	Submitted	Sowmya Team	Sowmya Team	Leaving

- Request for approve the leave



Gmail
Search mail
Compose
Inbox 2
Starred
Snoozed
Sent
Drafts
More
Labels
2 of 410
Inbox ×
Reply
Forward

request for approve the leave

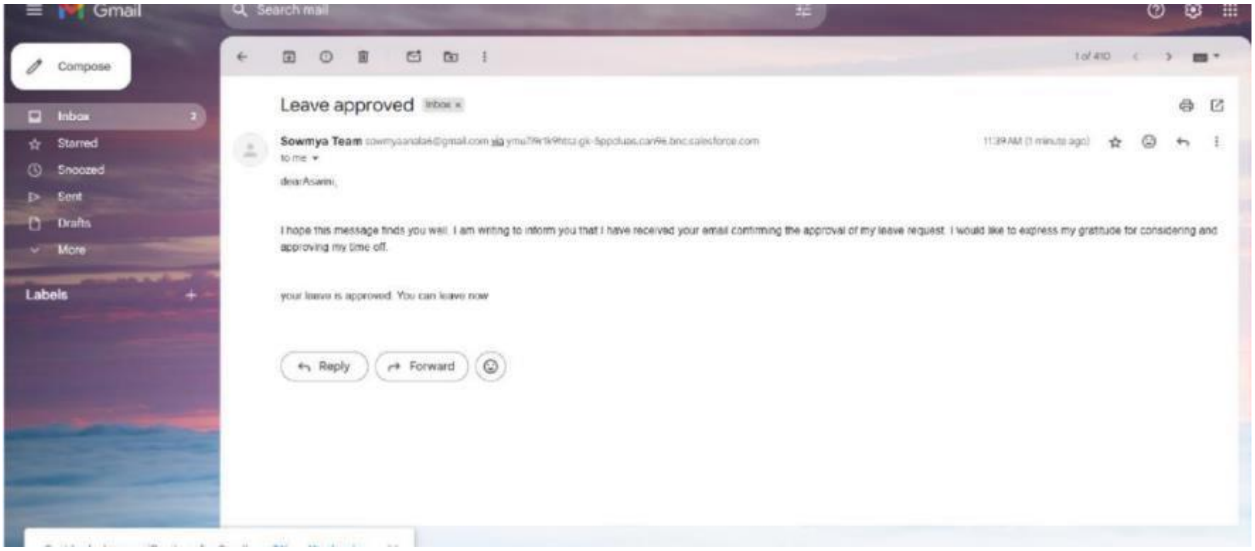
Sowmya Team 11:36 AM (4 minutes ago)
to me

Dear Sowmya Team,

Please approve my leave

Sowmya Team 11:39 AM (1 minute ago)
to me

- Leave approved



Gmail
Search mail
Compose
Inbox 2
Starred
Snoozed
Sent
Drafts
More
Labels
1 of 410
Inbox ×
Reply
Forward

Leave approved

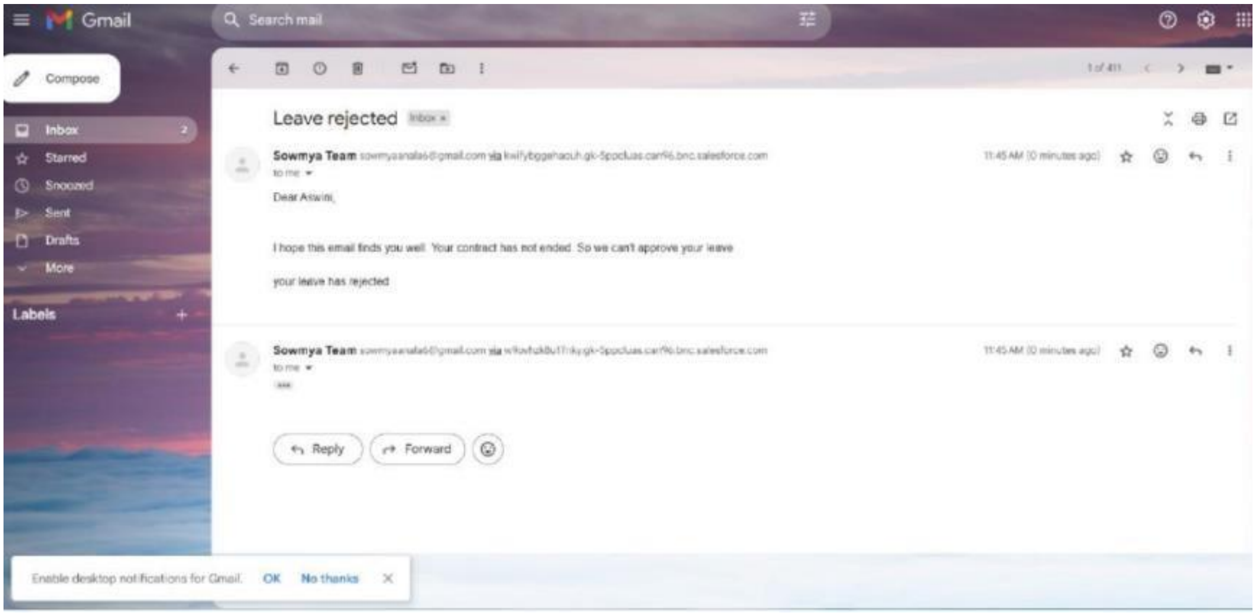
Sowmya Team 11:39 AM (1 minute ago)
to me

dear Aswini,

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

- Leave rejected


Gmail
Search mail
Compose
Inbox 2
Starred
Snoozed
Sent
Drafts
More
Labels
1 of 411
Inbox ×
Reply
Forward
Enable desktop notifications for Gmail. OK No thanks

Leave rejected

Sowmya Team
to me

11:45 AM (0 minutes ago)

Dear Aswini,

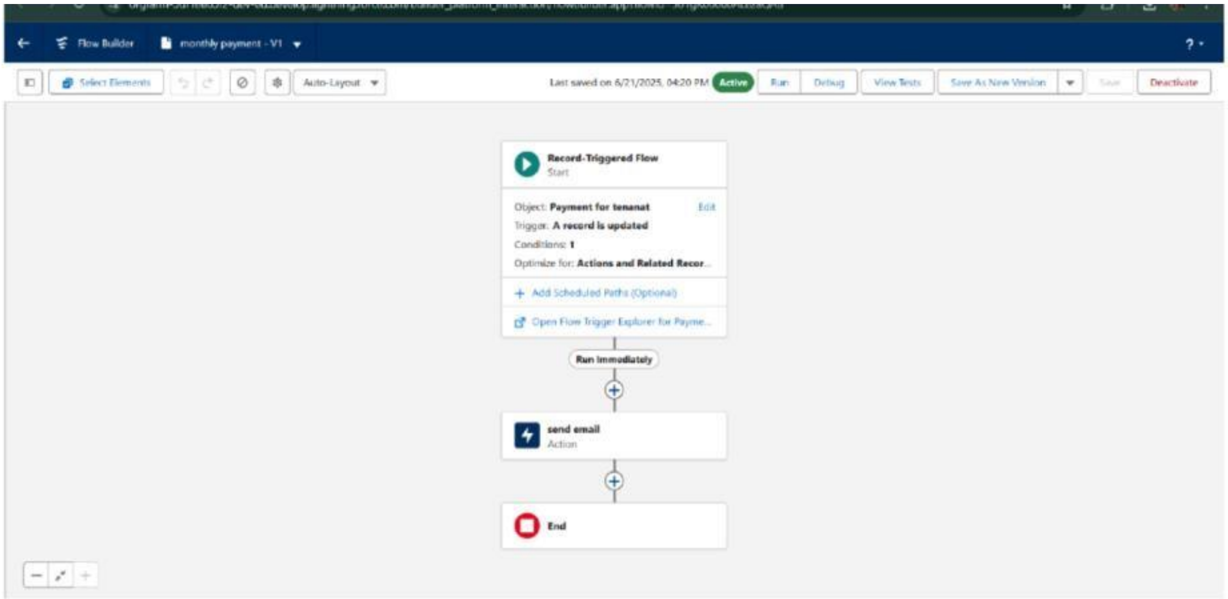
I hope this email finds you well. Your contract has not ended. So we can't approve your leave

your leave has rejected

Sowmya Team
to me

11:45 AM (0 minutes ago)

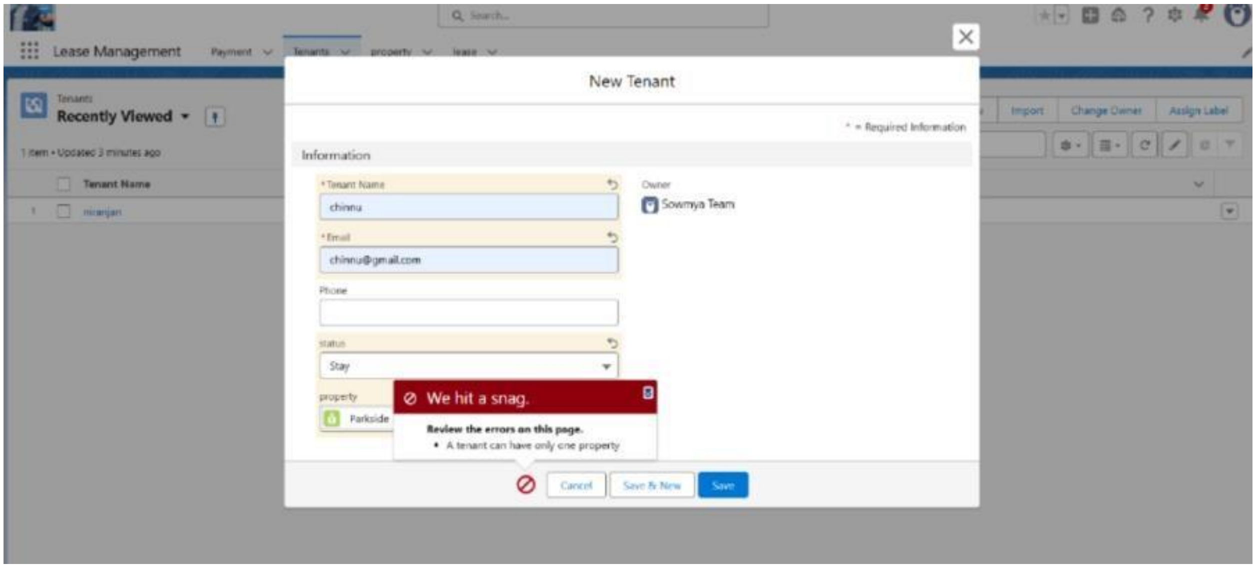
- Flow runs


Flow Builder
monthly payment - V1
Select Elements
Auto-Layout
Active
Run
Debug
View Tests
Save As New Version
Save
Deactivate
Record-Triggered Flow
Start
Edit
Add Scheduled Paths (Optional)
Open Flow Trigger Explorer for Payme...
Run Immediately
send email
Action
End

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

Object: **Payment for tenanat**
Trigger: **A record is updated**
Conditions: **1**
Optimize for: **Actions and Related Recor...**

- Trigger error messages


Lease Management
Payment
Tenants
property
lease
Tenants
Recently Viewed
1 item • Updated 3 minutes ago
Tenant Name
niranjan
Import
Change Owner
Assign Label
Cancel
Save & New
Save

New Tenant

* = Required Information

Information

*Tenant Name: chinnu

*Email: chinnu@gmail.com

Phone:

status: Stay

property: Parkside

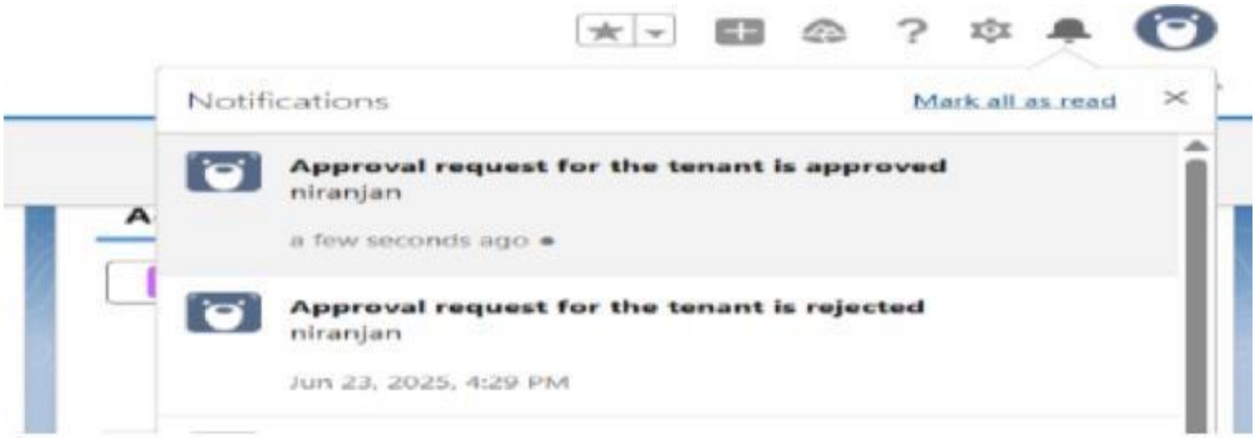
Owner: Sowmya Team

We hit a snag.

Review the errors on this page.

- A tenant can have only one property

- Approval process notifications


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

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

existingPropertyIds = new Set()

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'); }

}

}

}
```

MothlyEmailScheduler.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 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});

}

}

}
```