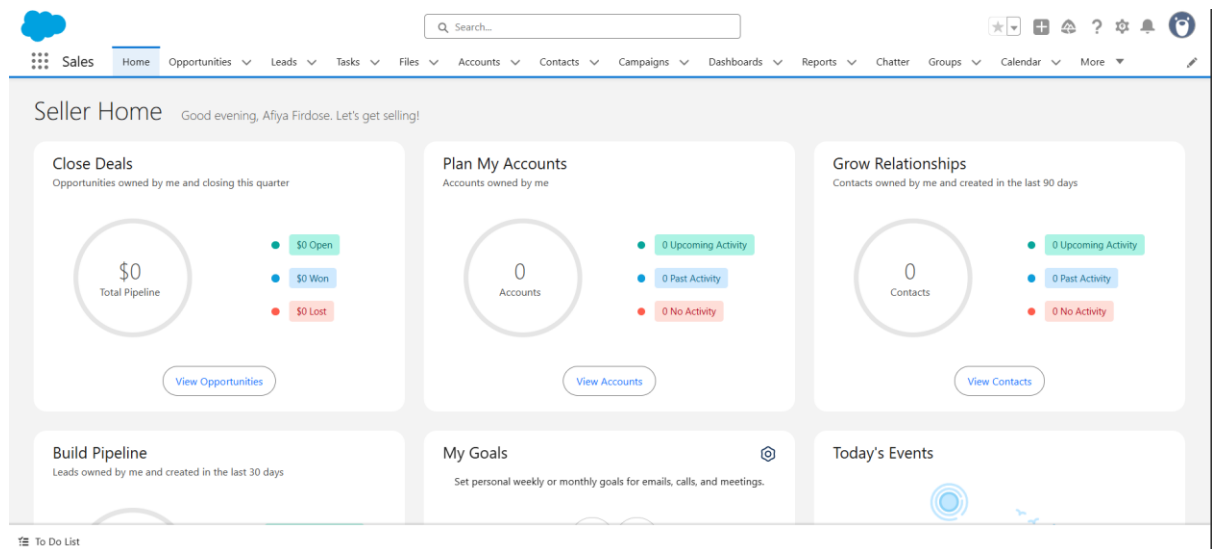# TourFlow: Real Estate Tour and Feedback Automator

## Phase 2: Org Setup & Configuration

1. Salesforce Org Creation

- Signed up for a free Salesforce Developer Edition org to use as the primary development environment.

- Confirmed login and navigation to the Setup menu.

2. Company Profile Setup

- Updated the Company Name to TourFlow Real Estate Tour and Feedback Automator.

- Configured the Time Zone to (GMT+05:30) India Standard Time.

- Specified the Default Currency as INR - Indian Rupee (₹).
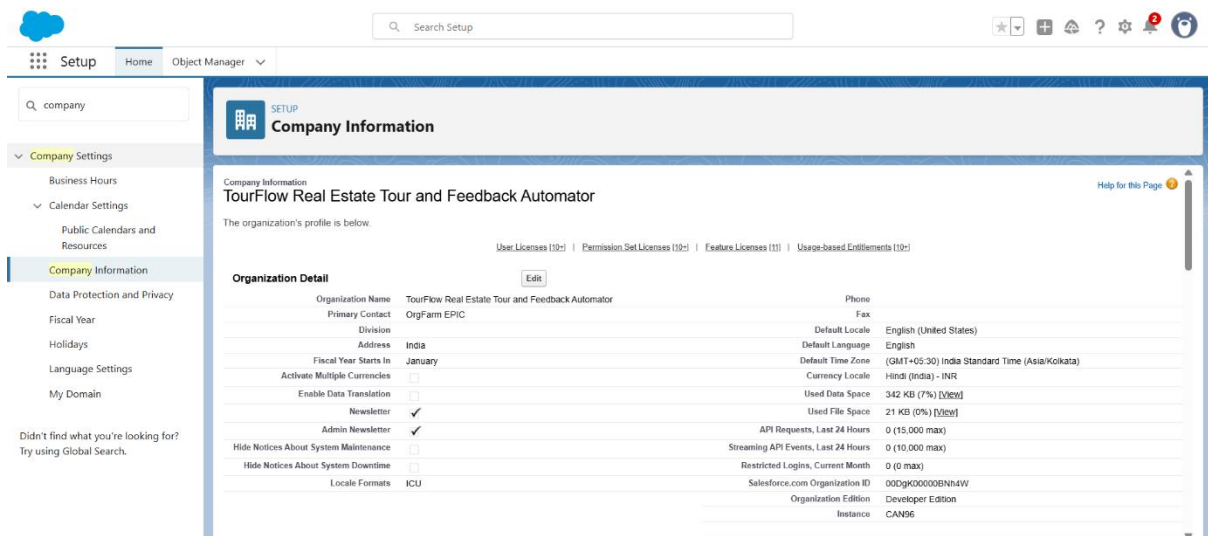
3. Business Hours & Holidays

- Created a new set of business hours named "Tour Scheduling Hours," setting the working time from 9:00 AM to 6:00 PM.
- Added specific holidays (Independence Day, Republic Day) and associated them with business hours.

4. Fiscal Year Settings

- The Standard Fiscal Year was selected, with a start month of January.
- This ensures that all financial and revenue reporting for the project aligns with the calendar year (Jan–Dec).


5. User Setup & Licenses

- Created three users for role-based testing :
  - Admin User: For full system access and configuration.
  - Real Estate Manager: For mid-level access and team oversight.
  - Real Estate Agent: For creating and managing their own tours and clients.
- Assigned Salesforce licenses to each user and mapped them to their respective roles.

6. Profiles

- Customized profiles for each role:

    o Real Estate Agent Profile: Granted Read, Create, and Edit permissions on the Client, Property, and Tour objects.

    o Real Estate Manager Profile: Granted Read, Create, Edit, and Delete permissions on all custom objects, along with View All and Modify All for full team oversight.

    o Admin Profile: Has full system access by default.
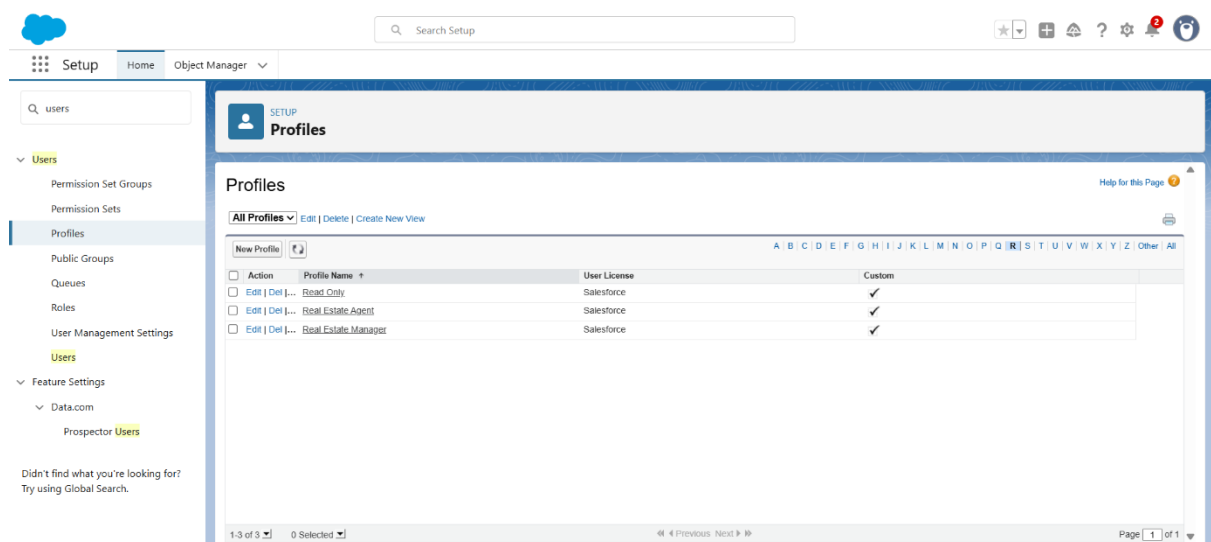
7. Roles

- Established a role hierarchy:

    o Real Estate Manager → Real Estate Agent

- This ensures that managers can automatically see the records of the agents who report to them, which is crucial for tour supervision and performance tracking.
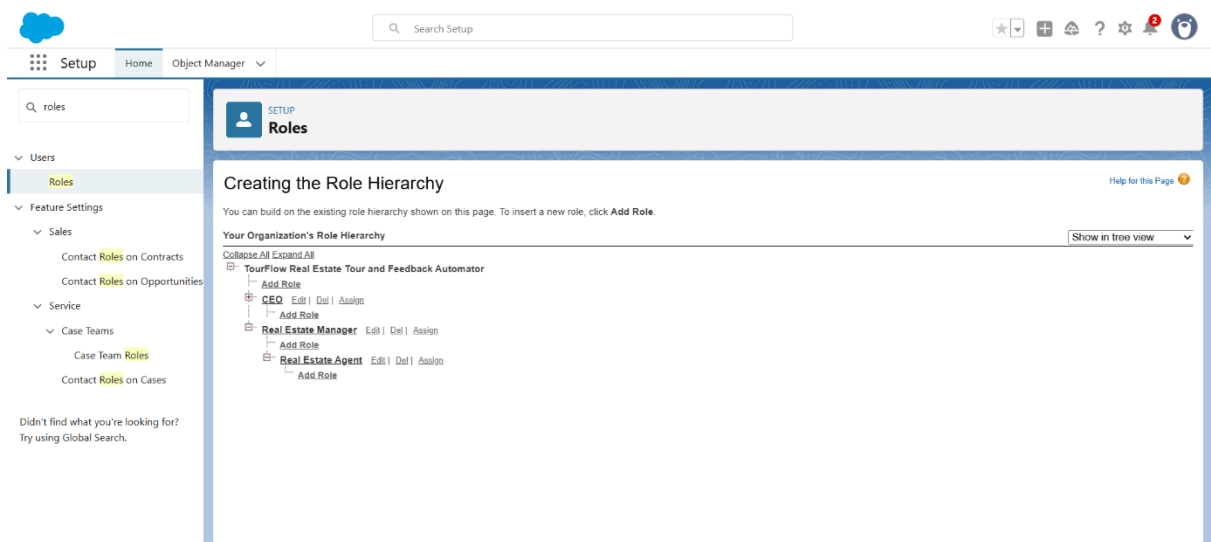
8. Permission Sets
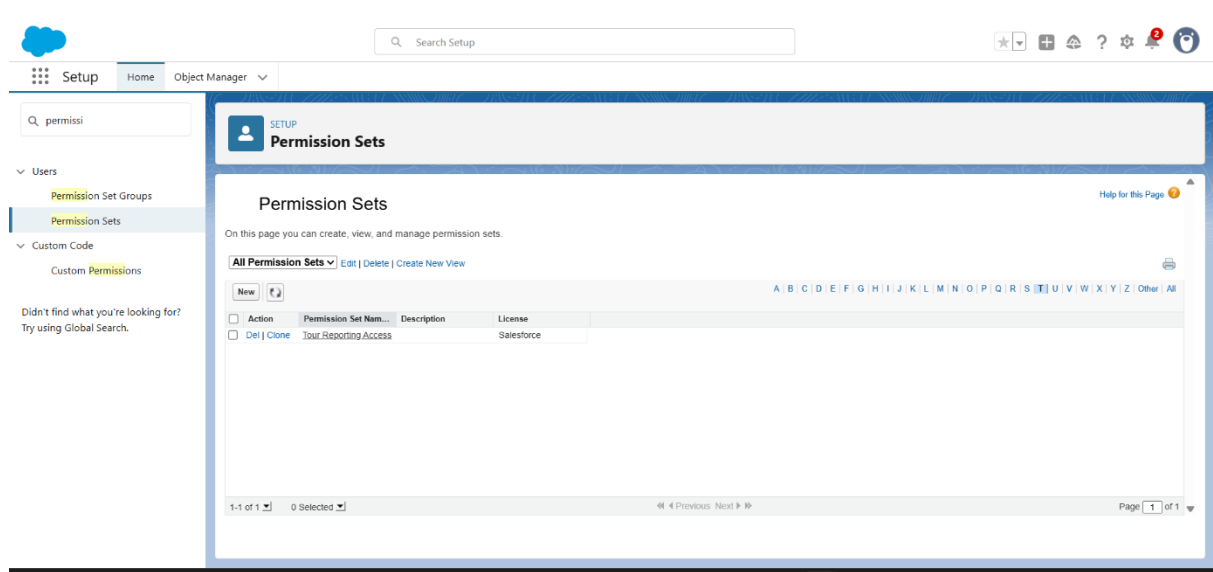
9. OWD

- Configured Org-Wide Defaults (OWD):
  - Client object = Private
  - Tour object = Private
  - Property object = Public Read Only

10. Sharing rules

- Implemented a role-based sharing rule:
  - Agent Tour Collaboration: A sharing rule on the Tour object was created to grant Read/Write access to all agents in the Real Estate Agent role, allowing them to collaborate on tours.

SETUP
Sharing Settings

Work Step Template Sharing Rules   [New] [Recalculate]   Work Step Template Sharing Rules Help (?)

No sharing rules specified.

Work Type Sharing Rules   [New] [Recalculate]   Work Type Sharing Rules Help (?)
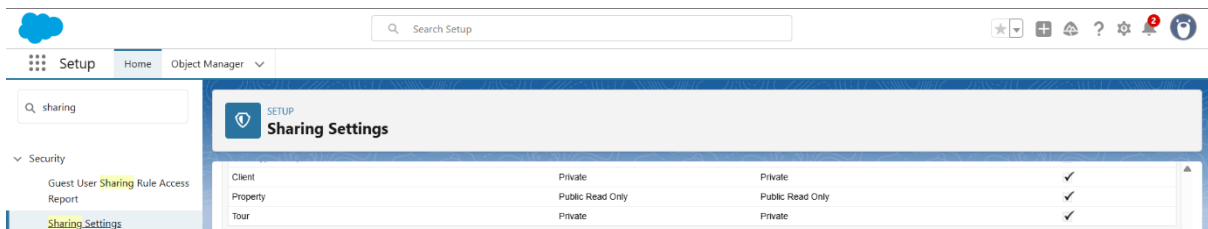
No sharing rules specified.

Work Type Group Sharing Rules   [New] [Recalculate]   Work Type Group Sharing Rules Help (?)

No sharing rules specified.

Client Sharing Rules   [New] [Recalculate]   Client Sharing Rules Help (?)

No sharing rules specified.

Property Sharing Rules   [New] [Recalculate]   Property Sharing Rules Help (?)

No sharing rules specified.

Tour Sharing Rules   [New] [Recalculate]   Tour Sharing Rules Help (?)

Action	Criteria	Shared With	Access Level
Edit | Del	Owner in Role and Internal Subordinates: Real Estate Agent	Role and Internal Subordinates: Real Estate Agent	Read/Write