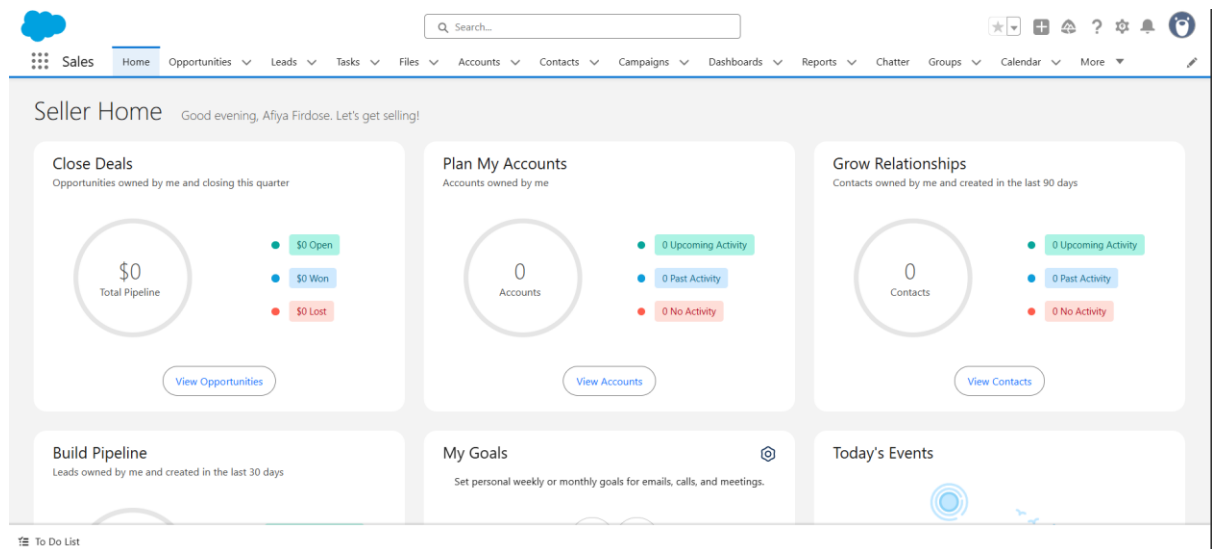


TourFlow: Real Estate Tour and Feedback Automator

Phase 2: Org Setup & Configuration

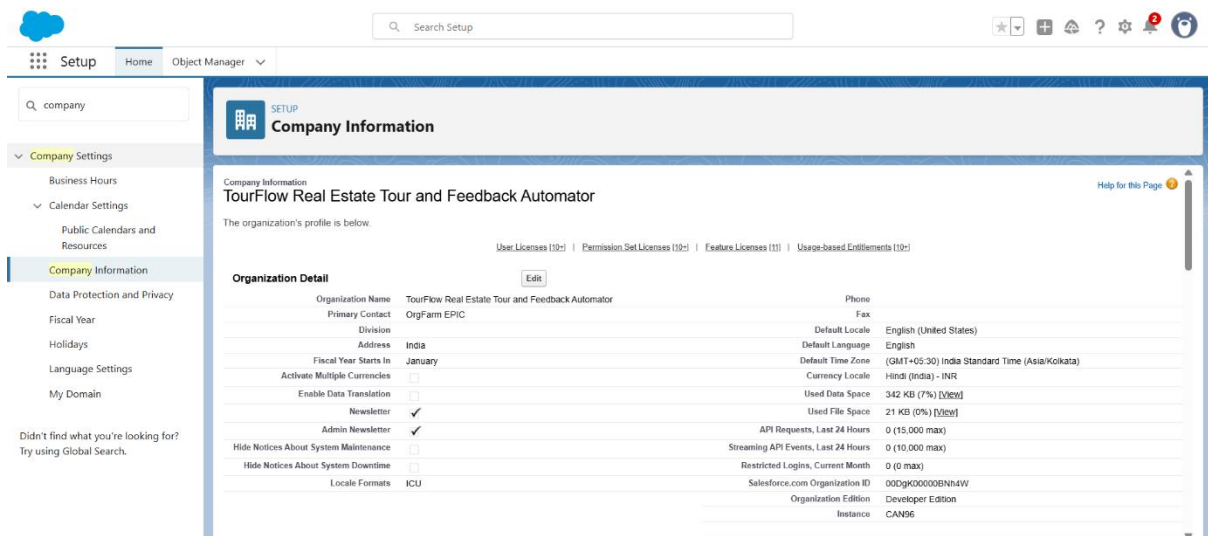
1. Salesforce Org Creation

- 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.

The screenshot shows the Salesforce Setup interface for Business Hours. The left sidebar contains a search bar with "busin" and a list of settings including "Company Settings" and "Business Hours". The main content area is titled "Organization Business Hours" and features a table with columns for "Action", "Business Hours Name", "Active", "Time Zone", and "Default". Two entries are listed: "Default" (Pacific Daylight Time) and "Tour Scheduling Business Hours" (India Standard Time). A "New Business Hours" button is visible above the table.

Action	Business Hours Name	Active	Time Zone	Default
Edit	Default	✓	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	<input type="checkbox"/>
Edit	Tour Scheduling Business Hours	✓	(GMT+05:30) India Standard Time (Asia/Kolkata)	<input checked="" type="checkbox"/>

The screenshot shows the Salesforce Setup interface for Holidays. The left sidebar contains a search bar with "holidays" and a list of settings including "Company Settings" and "Holidays". The main content area is titled "Holidays" and includes a description: "Holidays are dates and times at which business hours are suspended. Business hours are the days and hours that your support team is available." Below this is a table with columns for "Action", "Holiday Name", "Description", and "Date and Time". Two entries are listed: "Independence Day" (8/15/2025 All Day) and "Republic Day" (1/26/2026 All Day). A "New" button is located above the table.

Action	Holiday Name	Description	Date and Time
Edit Del	Independence Day		8/15/2025 All Day
Edit Del	Republic Day		1/26/2026 All Day

Elapsed Holidays
No records to display

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).

The screenshot shows the Salesforce Setup interface for 'Organization Fiscal Year Edit: TourFlow Real Estate Tour and Feedback Automator'. The left sidebar shows 'Setup' with 'Fiscal Year' selected under 'Company Settings'. The main content area has a title bar 'Fiscal Year' and a subtitle 'Organization Fiscal Year Edit: TourFlow Real Estate Tour and Feedback Automator'. Below this, a message states: 'To specify the fiscal year type for your organization, choose one of the options below.' There are two radio buttons: 'Standard Fiscal Year' (selected) and 'Custom Fiscal Year'. A 'Fiscal Year Information' box explains that the fiscal year can be changed and that changing it shifts periods and impacts forecasts. A 'Change Fiscal Year Period' form is shown with fields for 'Name' (TourFlow Real Estate Tour and Feedback Automator), 'Fiscal Year Start Month' (January), and 'Fiscal Year is Based On' (The ending month). The form has 'Save' and 'Cancel' buttons.

5. User Setup & Licenses

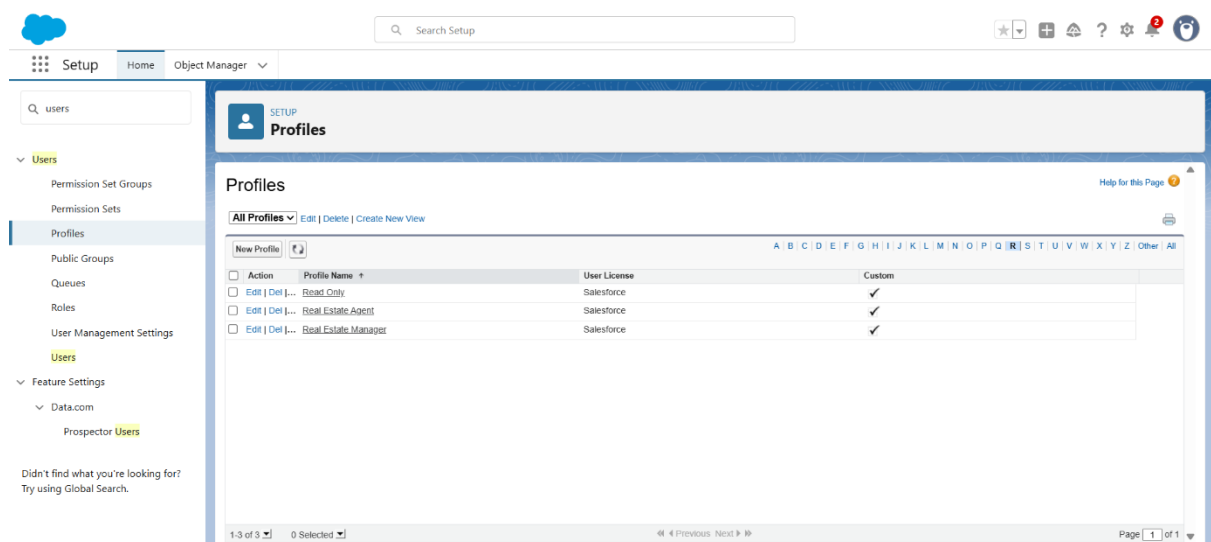
- Created three users for role-based testing :
 - Admin User: For full system access and configuration.
 - Real Estate Manager: For mid-level access and team oversight.
 - Real Estate Agent: For creating and managing their own tours and clients.
- Assigned Salesforce licenses to each user and mapped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

The screenshot shows the Salesforce Setup interface for 'Users'. The left sidebar shows 'Setup' with 'Users' selected under 'User Management Settings'. The main content area has a title bar 'Users' and a subtitle 'All Users'. Below this, a message states: 'On this page you can create, view, and manage users. To get more licenses, use the Your Account app. Let's Go'. There are links for 'View: All Users', 'Edit', and 'Create New User'. A table lists the users with columns for 'Action', 'Full Name', 'Alias', 'Username', 'Role', 'Active', and 'Profile'. The table contains 8 rows of user data. At the bottom of the table, there are links for 'New User', 'Reset Password(s)', and 'Add Multiple Users'.

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Agent, Real estate	agent	reagent@tf.com	Real Estate Agent	✓	Real Estate Agent
Edit	Chatter Expert	Chatter	chatter.0009000000n4uuaat.v96dcdhaz2e@chatter.salesforce.com		✓	Chatter Free User
Edit	EPIC_OrgFarm	OEPIC	epic.b79778412e0@orgfarm.salesforce.com		✓	System Administrator
Edit	Manager, Real estate	manager	remanager@tf.com	Real Estate Manager	✓	Real Estate Manager
Edit	Pamidi, Ahya, Findose	p.a	p.ahya@findose315303@apenforce.com		✓	System Administrator
Edit	User, Integration	integ	integration@0009000000n4uuaat.com		✓	Analytics Cloud Integration User
Edit	User, Security	sec	insight@security@0009000000n4uuaat.com		✓	Analytics Cloud Security User

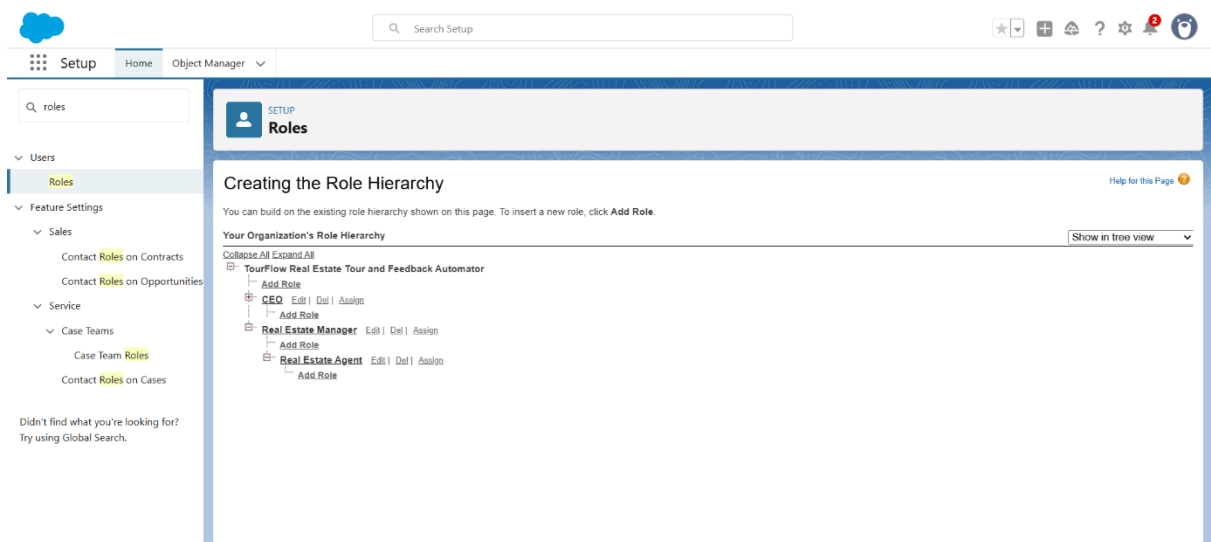
6. Profiles

- Customized profiles for each role:
 - Real Estate Agent Profile: Granted Read, Create, and Edit permissions on the Client, Property, and Tour objects.
 - 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.
 - Admin Profile: Has full system access by default.

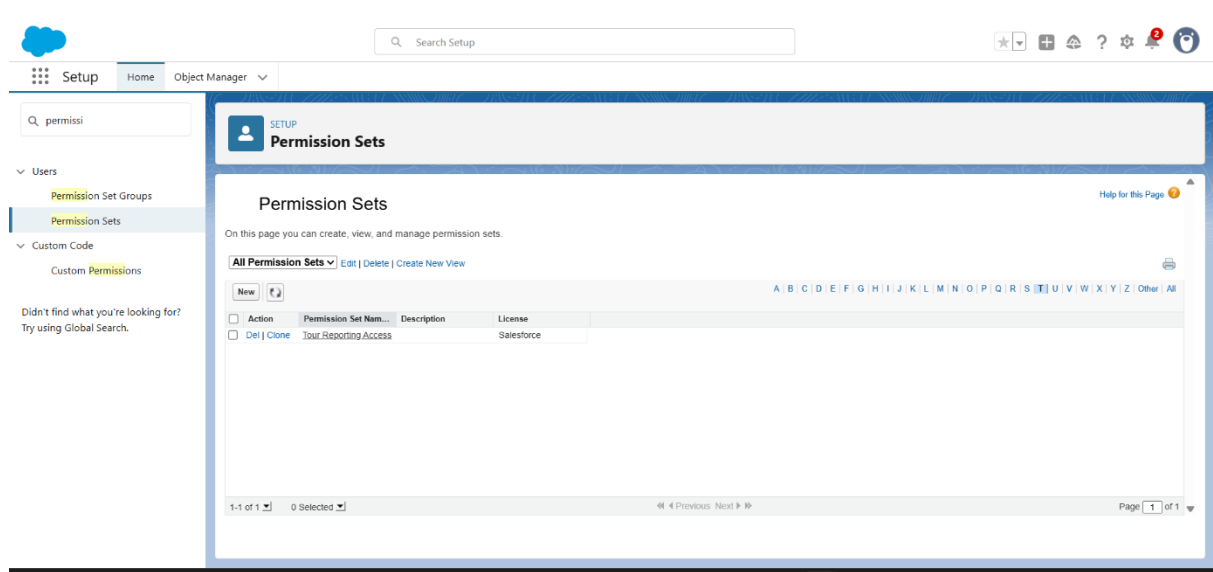


7. Roles

- Established a role hierarchy:
 - 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.

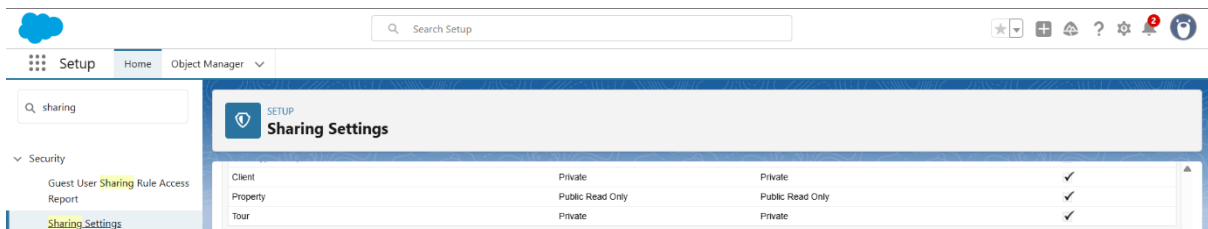


8. Permission Sets



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.



Search Setup



Setup Home Object Manager

Q sharing

Security

Guest User Sharing Rule Access Report

Sharing Settings

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

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