Phase 2: Org Setup & Configuration – Revaa Project

Objective

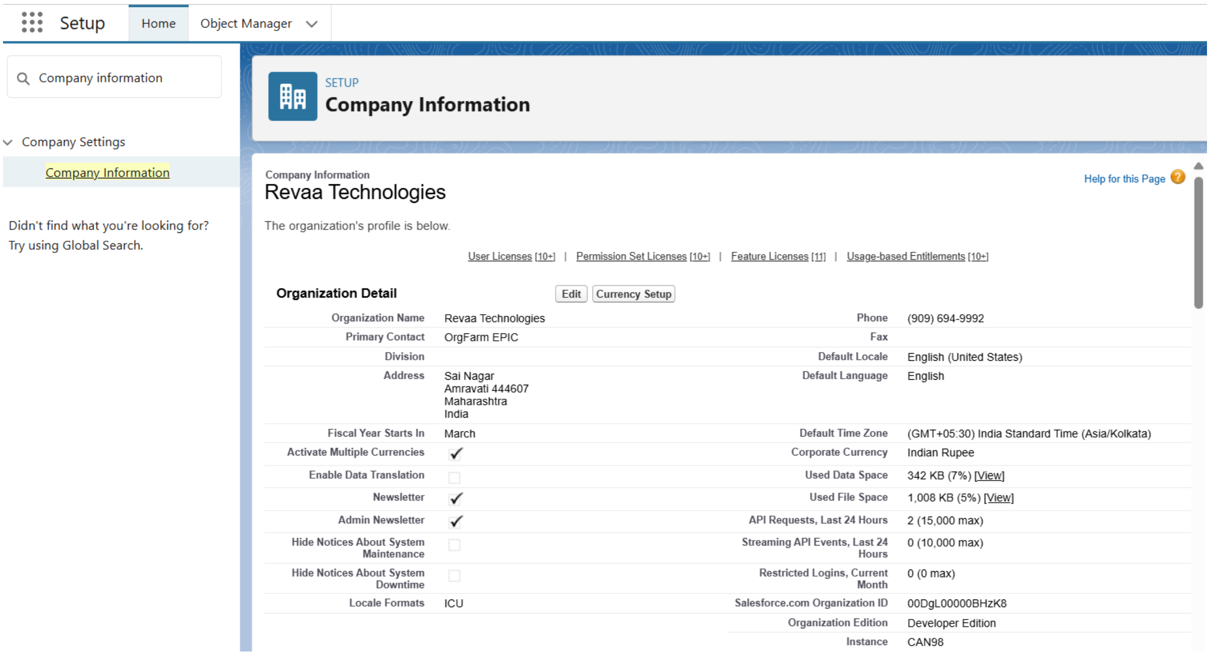
Phase 2 ensures the Salesforce org is properly configured for the Fractional Real Estate Investment Simulation Platform. This includes setting up **company profile, users, profiles, roles, permission sets, security, and environment basics**. Proper configuration is essential for consistent data access, automation, and reporting in later phases.

Step 1: Salesforce Dev Org Setup

1. Sign up for a **Salesforce Developer Edition (CRM)**: developer.salesforce.com/signup
2. Verify your email and log in.
3. Confirm you are in **Lightning Experience UI**.
4. Enable **My Domain** for better app navigation and Lightning components:
    - Setup → My Domain → Choose a domain → Check availability → Save & Deploy.

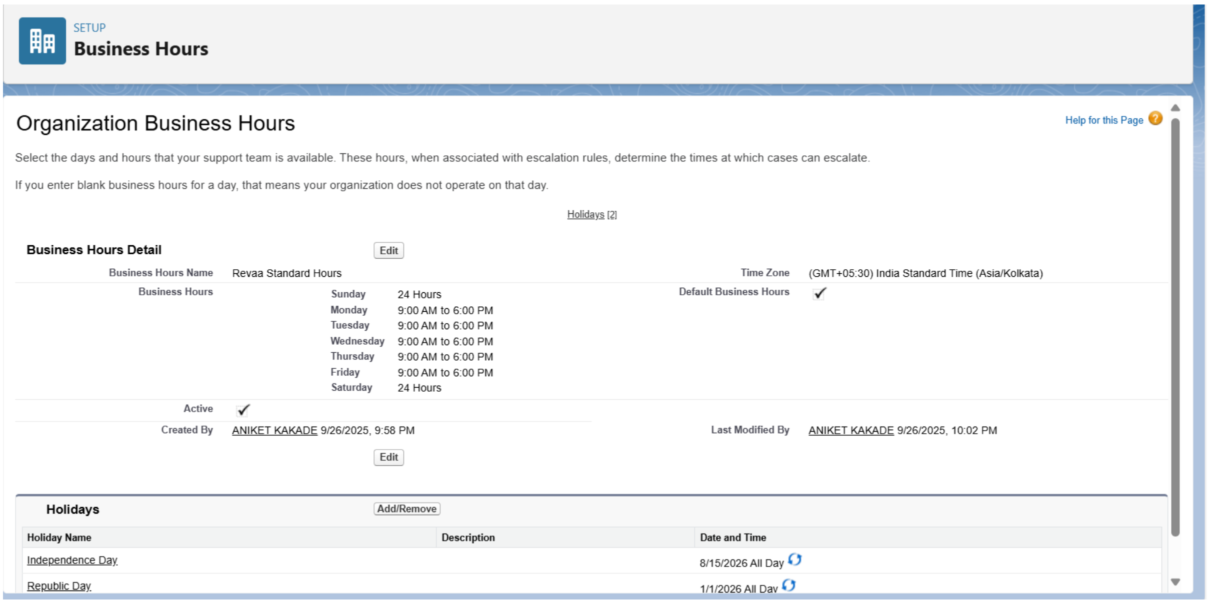
Step 2: Company Profile Setup

1. Setup → Company Information → Fill in:
    - Company Name: Revaa Technologies
    - Default Currency: INR
    - Default Locale: India
    - Fiscal Year Start: April 1 (typical for India)
    - Time Zone: GMT+5:30 (Asia/Kolkata)
    - Enable Multiple Currencies if needed (optional).
    - **Screenshot:**



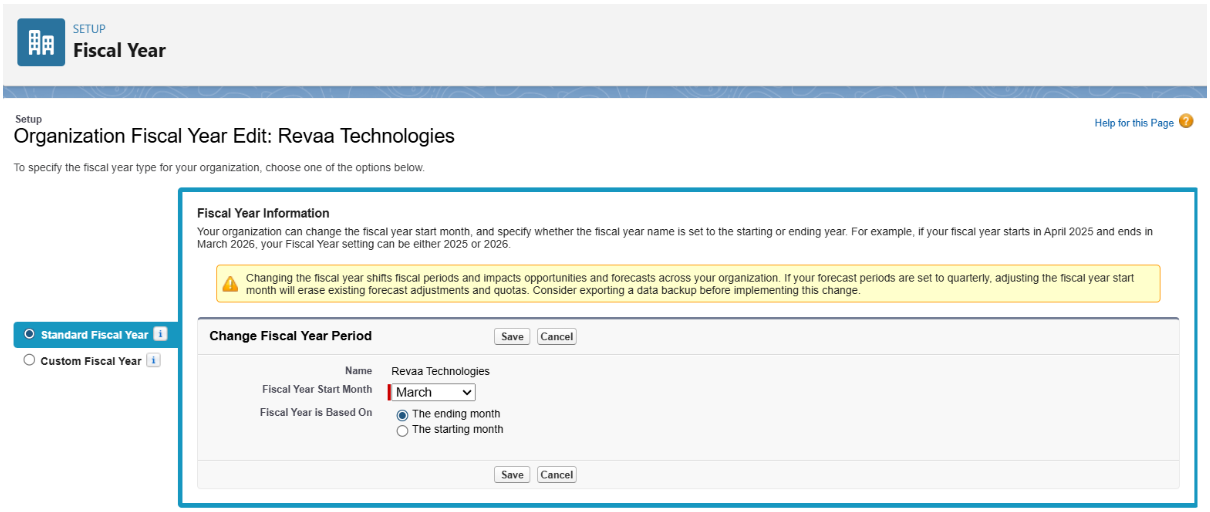
Step 3: Business Hours & Holidays

1. Setup → Business Hours → New:
   - Business Hours Name: Revaa Standard Hours
   - Days: Monday – Friday
   - Hours: 9:00 AM – 6:00 PM
   - Save.
2. Setup → Holidays → New:
   - Enter national holidays (e.g., Diwali, Independence Day).
   - **Screenshot:**



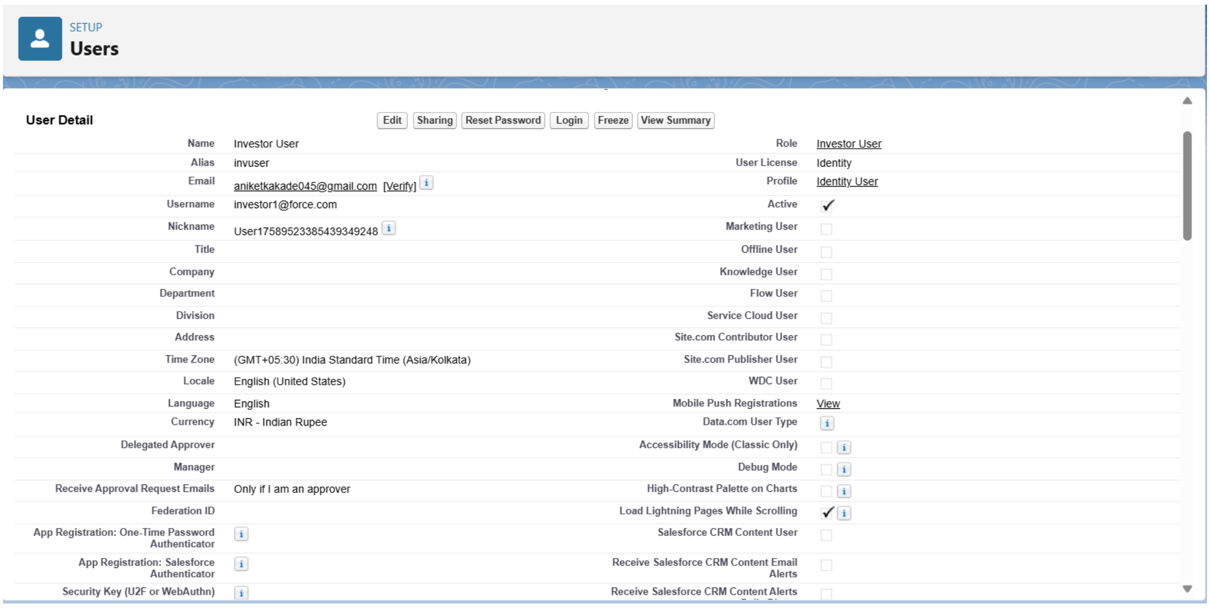
Step 4: Fiscal Year Settings

1. Setup → Fiscal Year → Activate Standard Fiscal Year.
2. If using custom fiscal periods (optional), create them here.
    - **Screenshot:**



Step 5: User Setup & Licenses

1. Setup → Users → New User:
   - License: Salesforce
   - Profile: System Administrator (for admin users)
   - Fill Name, Email, Username (unique format: user@revaa.com)
   - Click Save.
   - **Screenshot:**



Step 6: Profiles

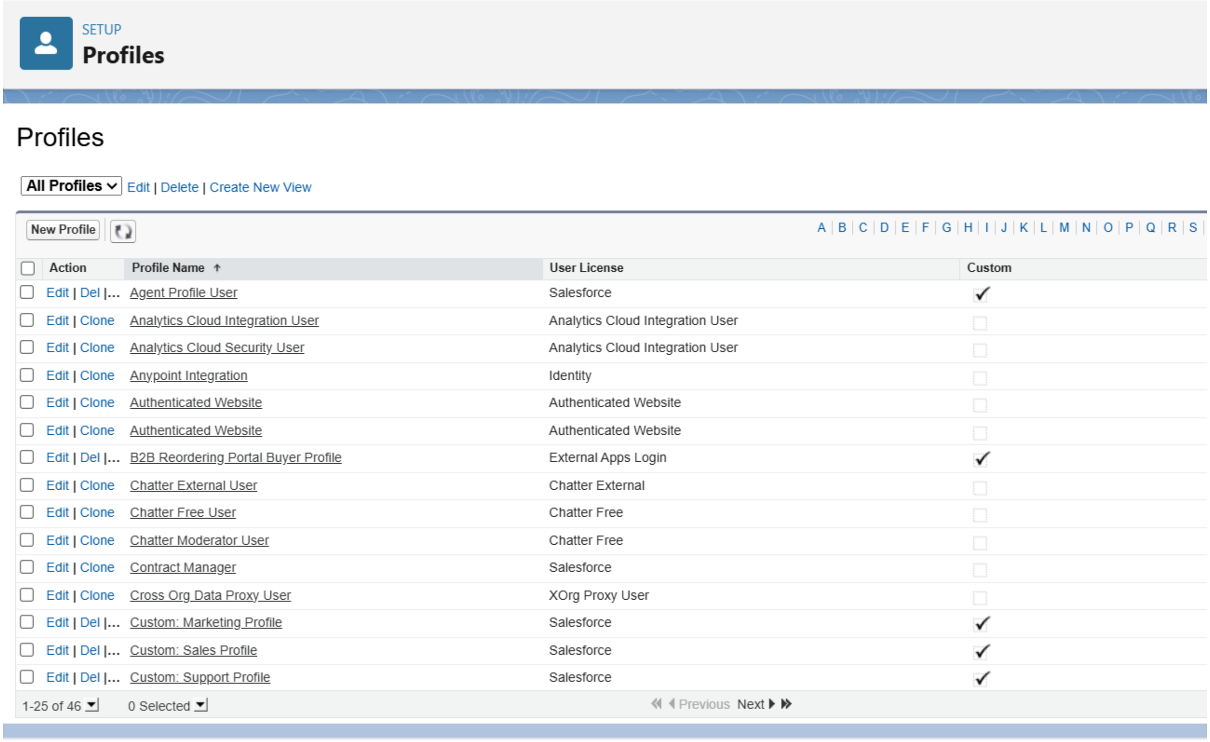
6.1 Default Profiles

- **System Administrator** → Full access (assigned to project admin).
- **Standard User** → Can view/create records but no admin privileges.

6.2 Custom Profiles (for Revaa)

- Clone **Standard User** → Name: **Investor Profile**
  - Permissions: Read/Write access to Investment, Property objects.
  - No access to Setup or App Builder.
- Clone **Standard User** → Name: **Manager Profile**
  - Permissions: Manage Properties, Transactions, view all investor records under their role.

- **Screenshot:**



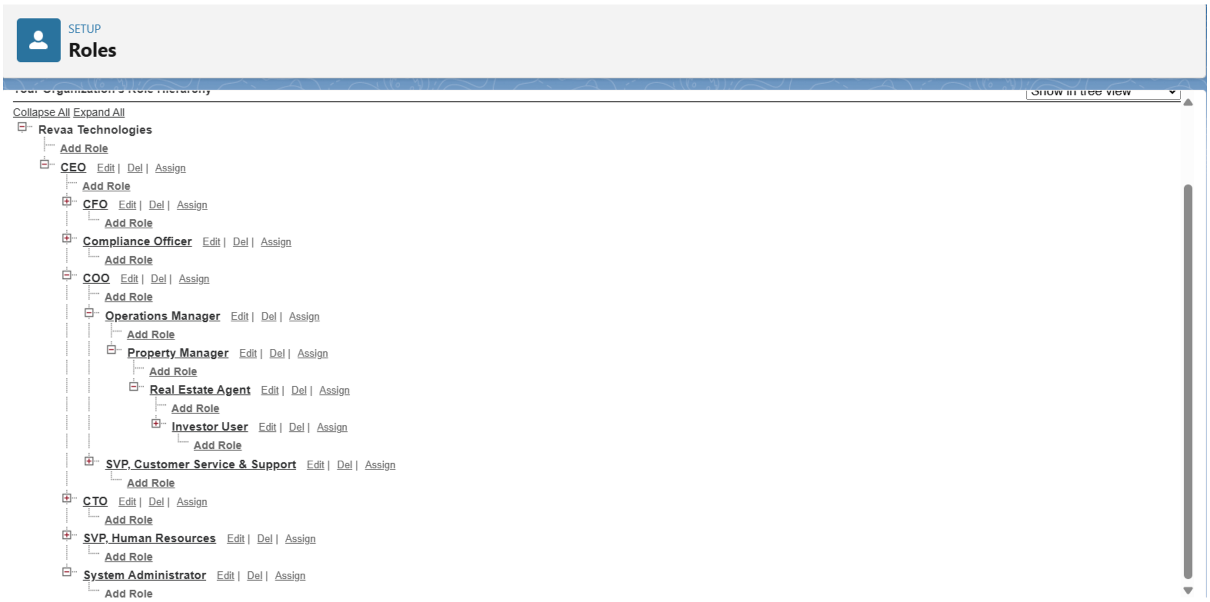
Step 7: Roles

1. Setup → Roles → Set Up Roles → Click "Add Role".
2. Build the **Role Hierarchy**:

```
CEO
├── CFO
│   └── Finance Analyst (optional)
└── COO
    └── Operations Manager
        └── Property Manager
            └── Agent
                └── Investor User
```

3. Assign users to their respective roles when creating their user account.

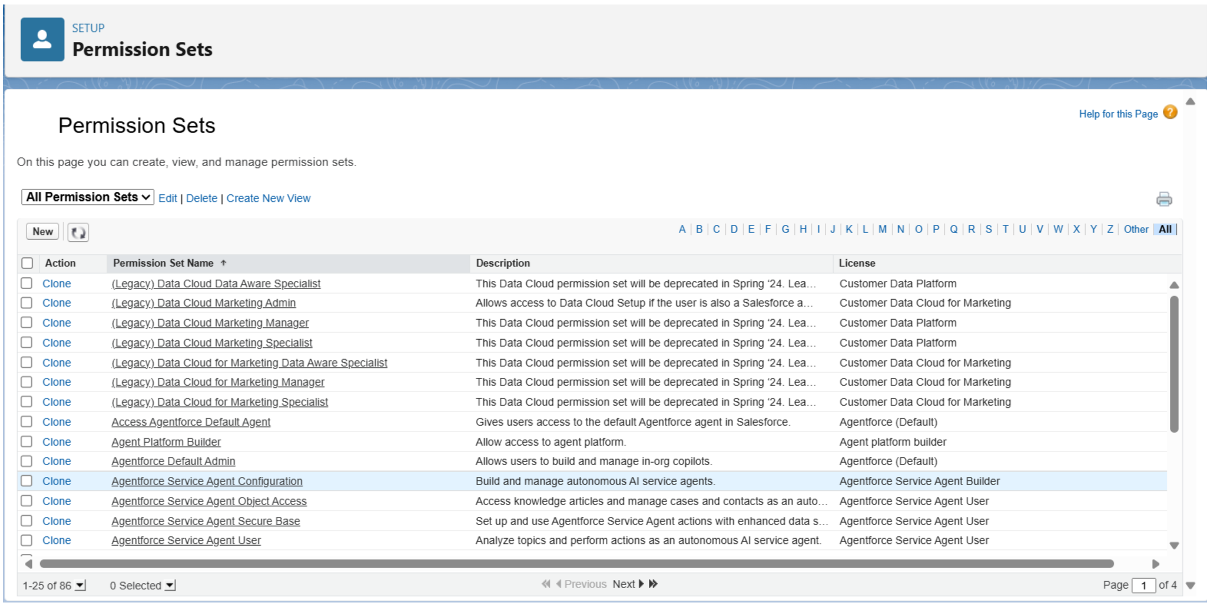
- **Screenshot:**



Step 8: Permission Sets

1. Setup → Permission Sets → New:
   - Example: “Investor Extra Access”
     - Object permissions: Investment Transactions (Read Only)
     - Field-level permissions: Allow specific fields visibility.
2. Assign to users who need **extra access** beyond their profile.

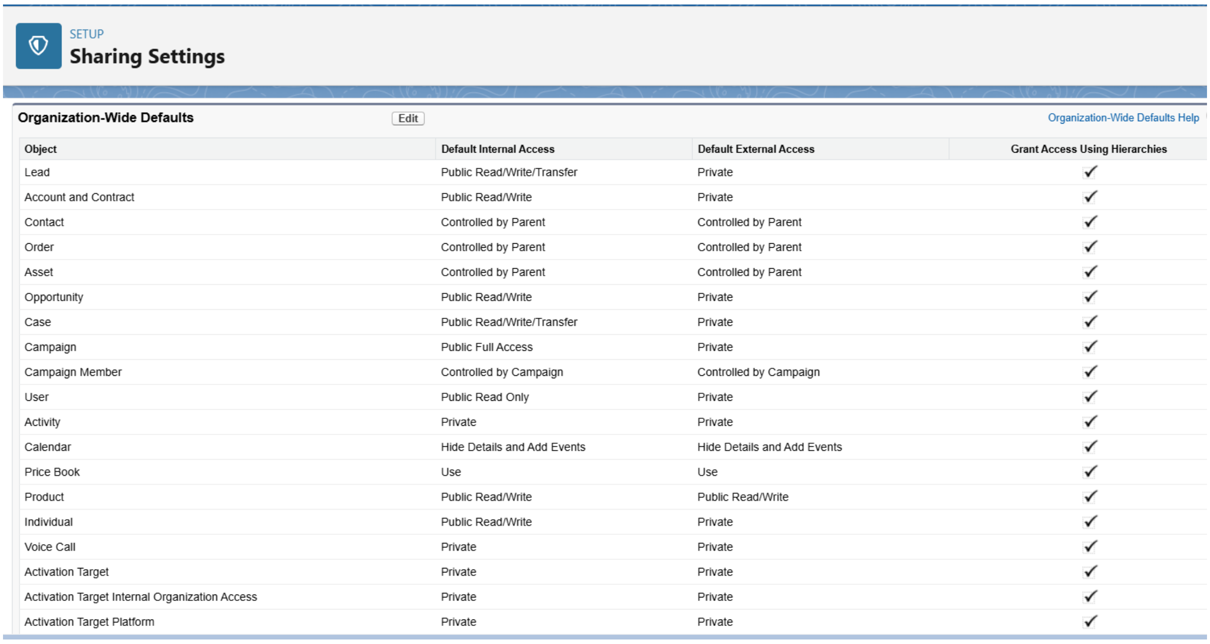
- **Screenshot:**



Step 9: Organization-Wide Defaults (OWD)

1. Setup → Sharing Settings → Organization-Wide Defaults:
   - Property: Private (so only owner/role hierarchy can see)
   - Investment Transaction: Private
   - Investor: Private
   - Profit Distribution: Private
2. Save changes.

- **Screenshot:**


SETUP
Sharing Settings

Organization-Wide Defaults Edit Organization-Wide Defaults Help

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public Read/Write	Private	✓
Case	Public Read/Write/Transfer	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓
Activity	Private	Private	✓
Calendar	Hide Details and Add Events	Hide Details and Add Events	✓
Price Book	Use	Use	✓
Product	Public Read/Write	Public Read/Write	✓
Individual	Public Read/Write	Private	✓
Voice Call	Private	Private	✓
Activation Target	Private	Private	✓
Activation Target Internal Organization Access	Private	Private	✓
Activation Target Platform	Private	Private	✓

Step 10: Sharing Rules

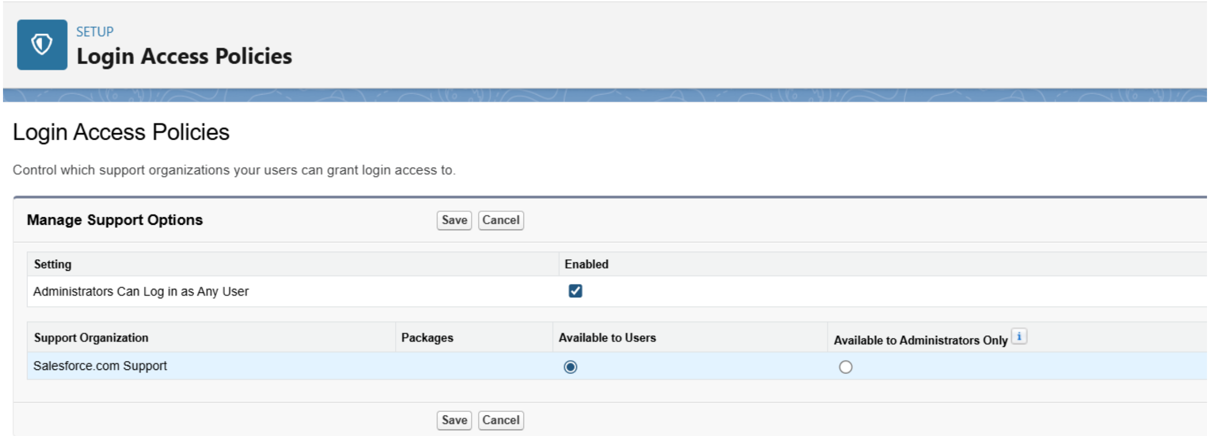
1. Setup → Sharing Settings → Create New Rule:
   - Example: All Property records owned by Property Manager shared with COO role.
   - Example: All Investment Transaction records shared with Operations Manager role.

Step 11: Login Access Policies

1. Setup → Login Access Policies → Enable:

  - Let admins log in as any user for testing (optional).

- **Screenshot:**



Step 12: Sandbox Usage

- For Phase 2, use **Developer Org directly**.
- For production-grade org: create **sandbox** for testing: Setup → Sandboxes → New Sandbox.