

## 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.

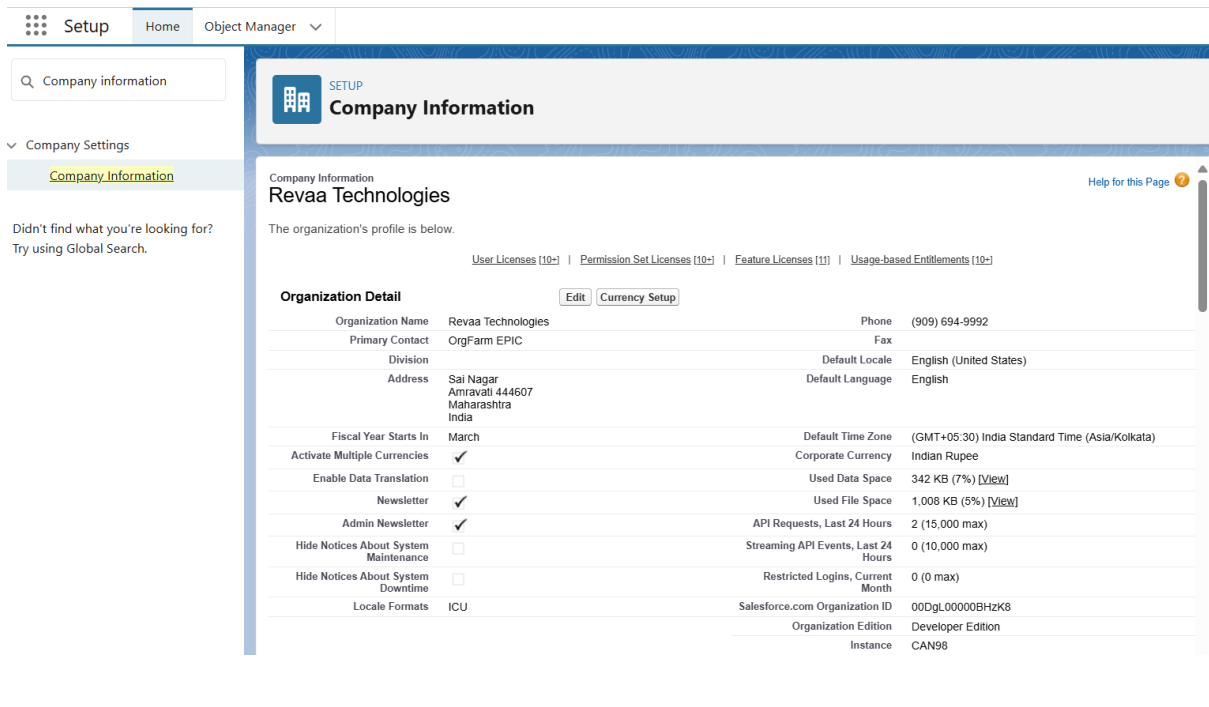
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### Step 1: Salesforce Dev Org Setup

1. Sign up for a **Salesforce Developer Edition (CRM)**: [developer.salesforce.com/signup](https://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.
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### 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:**



Select the days and hours that your support team is available. These hours, when associated with escalation rules, determine the times at which cases can escalate.

If you enter blank business hours for a day, that means your organization does not operate on that day.

### Business Hours Detail

|                     |  |                                  |                    |                        |   |  |
|---------------------|--|----------------------------------|--------------------|------------------------|---|--|
| Business Hours Name |  | Revaa Standard Hours             |                    | Time Zone              |   | (GMT+05:30) India Standard Time (Asia/Kolkata) |
| Business Hours      |  | Sunday                           | 24 Hours           | Default Business Hours | ✔ |  |
|                     |  | Monday                           | 9:00 AM to 6:00 PM |                        |   |  |
|                     |  | Tuesday                          | 9:00 AM to 6:00 PM |                        |   |  |
|                     |  | Wednesday                        | 9:00 AM to 6:00 PM |                        |   |  |
|                     |  | Thursday                         | 9:00 AM to 6:00 PM |                        |   |  |
|                     |  | Friday                           | 9:00 AM to 6:00 PM |                        |   |  |
|                     |  | Saturday                         | 24 Hours           |                        |   |  |
| Active              |  | ✔                                |                    |                        |   |  |
| Created By          |  | ANIKET KAKADE 9/26/2025, 9:58 PM |                    | Last Modified By       |   | ANIKET KAKADE 9/26/2025, 10:02 PM              |

### Holidays

| Holiday Name                     | Description | Date and Time   |
|----------------------------------|-------------|---|
| <a href="#">Independence Day</a> |             | 8/15/2026 All Day  |
| <a href="#">Republic Day</a>     |             | 1/1/2026 All Day   |

## Step 4: Fiscal Year Settings

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

- **Screenshot:**

Setup  
Organization Fiscal Year Edit: Revaa Technologies

To specify the fiscal year type for your organization, choose one of the options below.

### Fiscal Year Information

Your organization can change the fiscal year start month, and specify whether the fiscal year name is set to the starting or ending year. For example, if your fiscal year starts in April 2025 and ends in March 2026, your Fiscal Year setting can be either 2025 or 2026.

 Changing the fiscal year shifts fiscal periods and impacts opportunities and forecasts across your organization. If your forecast periods are set to quarterly, adjusting the fiscal year start month will erase existing forecast adjustments and quotas. Consider exporting a data backup before implementing this change.

☒ Standard Fiscal Year 

☐ Custom Fiscal Year 

## Change Fiscal Year Period

Name Revaa Technologies

Fiscal Year Start Month March

Fiscal Year is Based On ☒ The ending month  
☐ The starting month

Save Cancel

## 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:**

The screenshot shows the 'User Detail' page in Salesforce. The user is named 'Investor User' with email 'aniketkade045@gmail.com' and username 'investor1@force.com'. The role is 'Investor User' and the profile is 'Identity User'. The user is active. The page includes various settings like Time Zone (GMT+05:30 India Standard Time), Language (English), and Currency (INR - Indian Rupee). There are also checkboxes for 'Marketing User', 'Offline User', 'Knowledge User', 'Flow User', 'Service Cloud User', 'Site.com Contributor User', 'Site.com Publisher User', and 'WDC User'. The 'Mobile Push Registrations' section is expanded, showing 'Data.com User Type' and 'Accessability Mode (Classic Only)'. The 'Debug Mode' checkbox is checked. The 'Receive Approval Request Emails' checkbox is checked. The 'Load Lightning Pages While Scrolling' checkbox is checked. The 'Salesforce CRM Content User' checkbox is checked. The 'Receive Salesforce CRM Content Email Alerts' checkbox is checked. The 'Receive Salesforce CRM Content Alerts' checkbox is checked.

## 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:**

| Action   | Profile Name                        | User License                     | Custom                   |
|--|-------------------------------------|----------------------------------|--------------------------|
| <a href="#">Edit</a>   <a href="#">Del</a>   ... | Agent Profile User                  | Salesforce                       | ✓                        |
| <a href="#">Edit</a>   <a href="#">Clone</a>     | Analytics Cloud Integration User    | Analytics Cloud Integration User | <input type="checkbox"/> |
| <a href="#">Edit</a>   <a href="#">Clone</a>     | Analytics Cloud Security User       | Analytics Cloud Integration User | <input type="checkbox"/> |
| <a href="#">Edit</a>   <a href="#">Clone</a>     | Anypoint Integration                | Identity                         | <input type="checkbox"/> |
| <a href="#">Edit</a>   <a href="#">Clone</a>     | Authenticated Website               | Authenticated Website            | <input type="checkbox"/> |
| <a href="#">Edit</a>   <a href="#">Clone</a>     | Authenticated Website               | Authenticated Website            | <input type="checkbox"/> |
| <a href="#">Edit</a>   <a href="#">Del</a>   ... | B2B Reordering Portal Buyer Profile | External Apps Login              | ✓                        |
| <a href="#">Edit</a>   <a href="#">Clone</a>     | Chatter External User               | Chatter External                 | <input type="checkbox"/> |
| <a href="#">Edit</a>   <a href="#">Clone</a>     | Chatter Free User                   | Chatter Free                     | <input type="checkbox"/> |
| <a href="#">Edit</a>   <a href="#">Clone</a>     | Chatter Moderator User              | Chatter Free                     | <input type="checkbox"/> |
| <a href="#">Edit</a>   <a href="#">Clone</a>     | Contract Manager                    | Salesforce                       | <input type="checkbox"/> |
| <a href="#">Edit</a>   <a href="#">Clone</a>     | Cross Org Data Proxy User           | XOrg Proxy User                  | <input type="checkbox"/> |
| <a href="#">Edit</a>   <a href="#">Del</a>   ... | Custom: Marketing Profile           | Salesforce                       | ✓                        |
| <a href="#">Edit</a>   <a href="#">Del</a>   ... | Custom: Sales Profile               | Salesforce                       | ✓                        |
| <a href="#">Edit</a>   <a href="#">Del</a>   ... | Custom: Support Profile             | Salesforce                       | ✓                        |

## 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:**

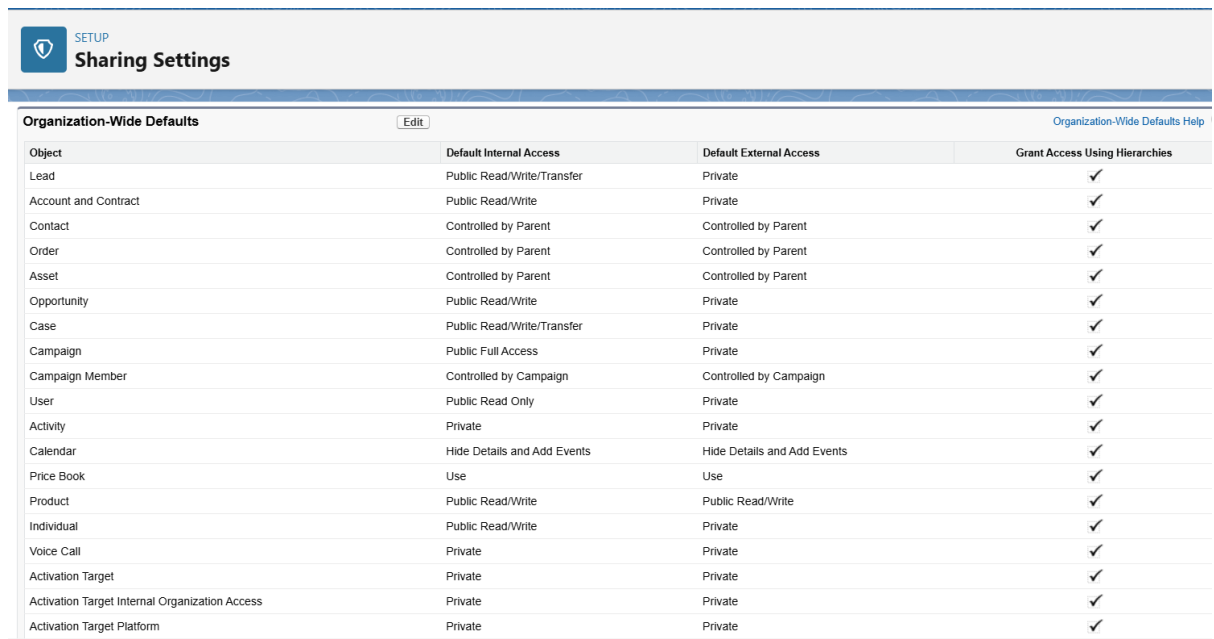


## Step 9: Organization-Wide Defaults (OWD)

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:



The screenshot shows the 'Sharing Settings' page in Salesforce Setup. The 'Organization-Wide Defaults' section is active, displaying a table with columns for Object, Default Internal Access, Default External Access, and Grant Access Using Hierarchies. The table lists various objects and their default sharing settings.

| 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:**

The screenshot shows the 'Login Access Policies' setup page in Salesforce. At the top, there's a header with the 'SETUP' icon and the title 'Login Access Policies'. Below this, the page title 'Login Access Policies' is followed by a subtitle: 'Control which support organizations your users can grant login access to.' The main section is titled 'Manage Support Options' and includes 'Save' and 'Cancel' buttons. A table lists settings for support organizations. The first setting, 'Administrators Can Log in as Any User', is currently 'Enabled' with a checked checkbox. Below this is a table with columns: 'Support Organization', 'Packages', 'Available to Users', and 'Available to Administrators Only' (with an info icon). The row for 'Salesforce.com Support' shows 'Available to Users' as selected (radio button) and 'Available to Administrators Only' as unselected (radio button). 'Save' and 'Cancel' buttons are at the bottom.

| Setting                               | Enabled                             |
|---------------------------------------|-------------------------------------|
| Administrators Can Log in as Any User | <input checked="" type="checkbox"/> |

| Support Organization   | Packages | Available to Users               | Available to Administrators Only <span>i</span> |
|------------------------|----------|----------------------------------|---|
| Salesforce.com Support |          | <input checked="" type="radio"/> | <input type="radio"/>                           |

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## Step 12: Sandbox Usage

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