

Phase 2: Org Setup & Configuration – Smart Property Portal

Goal: Establish a robust Salesforce environment tailored for real estate property management, ensuring scalability, security, and role-based access

1. Salesforce Edition

Utilized Developer Edition Org for full customization and testing flexibility.

Enabled all configurations, custom objects, and automation features required for SmartPropertyPortal.

2. Company Profile Setup

Configured company details to reflect project identity.

Set:-

Org Name: SmartPropertyPortal

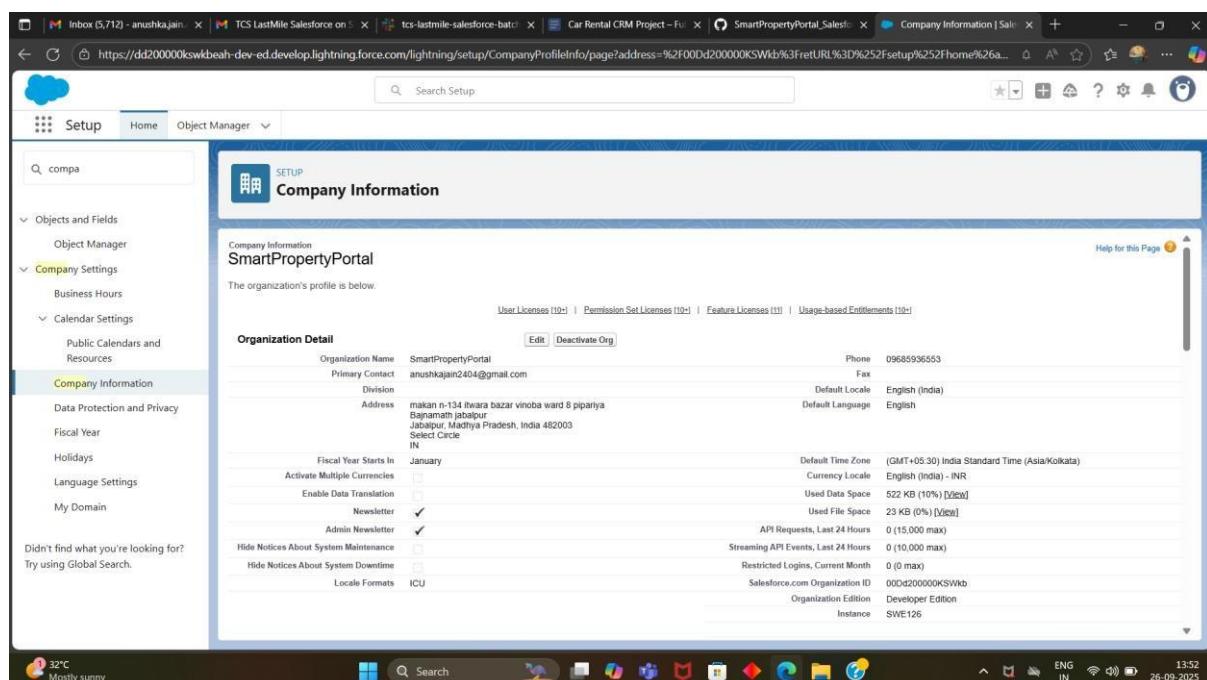
Time Zone: Asia/Kolkata

Locale: English (India)

Currency: INR

Fiscal Year: April–March

Screenshot:



https://drive.google.com/file/d/1XUROXxKi9qvR4_mY8dacMvnIU8LEKknb/view?usp=drive_link

3. Business Hours & Holidays

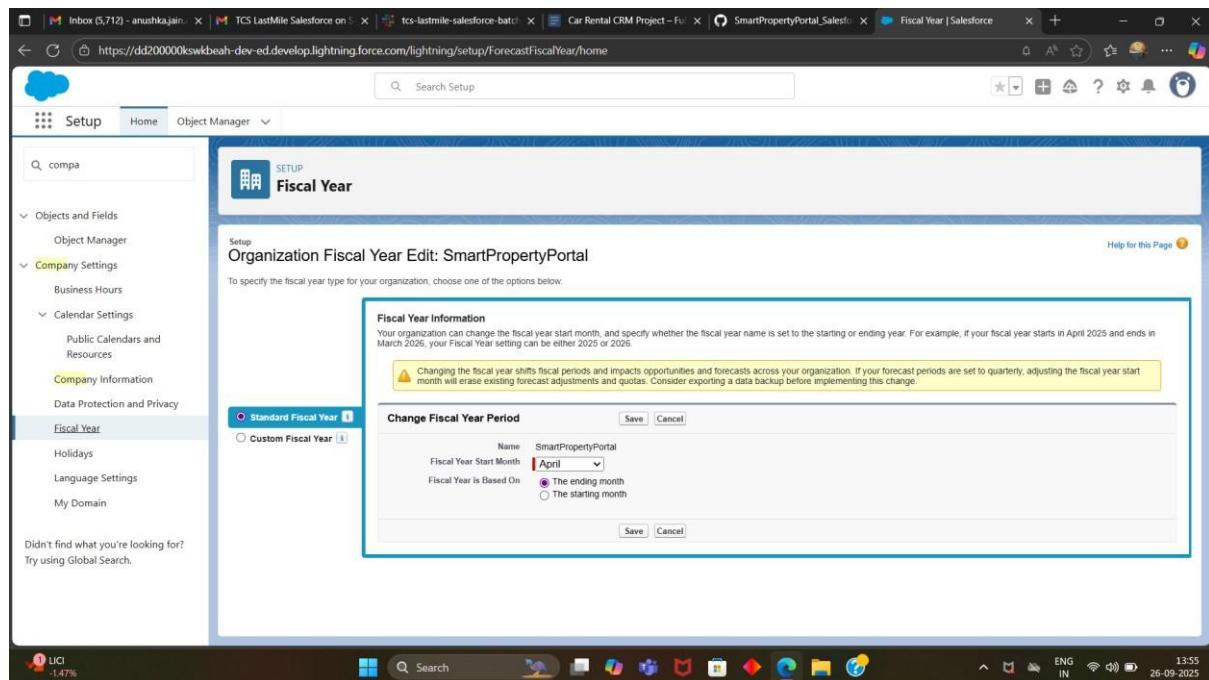
Defined working hours: 10 AM – 7 PM, Monday to Saturday

Added national holidays to restrict approval workflows during non-working days Ensures automation and login policies align with business operations

4. Fiscal Year Settings

Adopted Standard Fiscal Year (April–March) to match Indian financial reporting norms

Screenshot:



https://drive.google.com/file/d/1p_9Pf7GLInXBvGlbas7PoeEQ9_valUFA/view?usp=drive_link

5. User Setup & Licenses

Created key user roles to simulate real-world CRM usage:

Property Agent – manages listings and client interactions

Sales Manager – oversees approvals and revenue tracking

Admin – full system access and configuration control

6. Profiles & Roles

Profiles

Agent Profile: Can create/edit property records, restricted from sharing settings

Manager Profile: Full access to reports, approvals, dashboards

Roles

Hierarchical setup:

Manager > Agents

Enables visibility and reporting roll-up

7. Permission Sets

Created custom permission sets for agents needing access to Reports and Dashboards Ensures flexibility without altering base profiles

8. Org-Wide Defaults (OWD)

Property Object: Public Read Only – allows visibility across users

Client Inquiry Object: Private – ensures confidentiality of client data

9. Sharing Rules

Enabled sharing rules to allow agents within the same branch to view each other's property inquiries

Supports collaborative lead management

10. Login Access Policies

Restricted login hours for agents: 10 AM – 7 PM

Aligned with business hours to maintain operational control

11. Developer Org Setup

All configurations and customizations were built and tested in the Developer Org sandbox Ensures safe experimentation and deployment

12. Deployment Strategy

Documented deployment plan using Change Sets

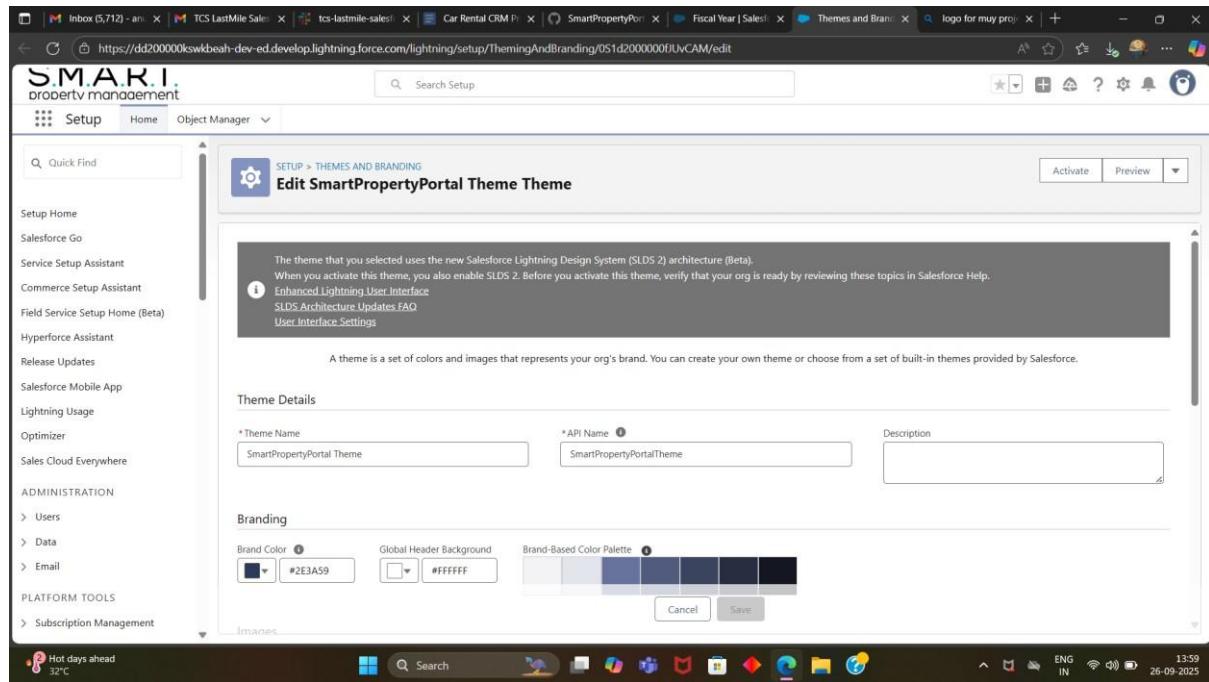
Ready for future migration to production environments

Branding & UI Customization

Theme Branding

Applied custom theme with blue-gray palette

Screenshot:

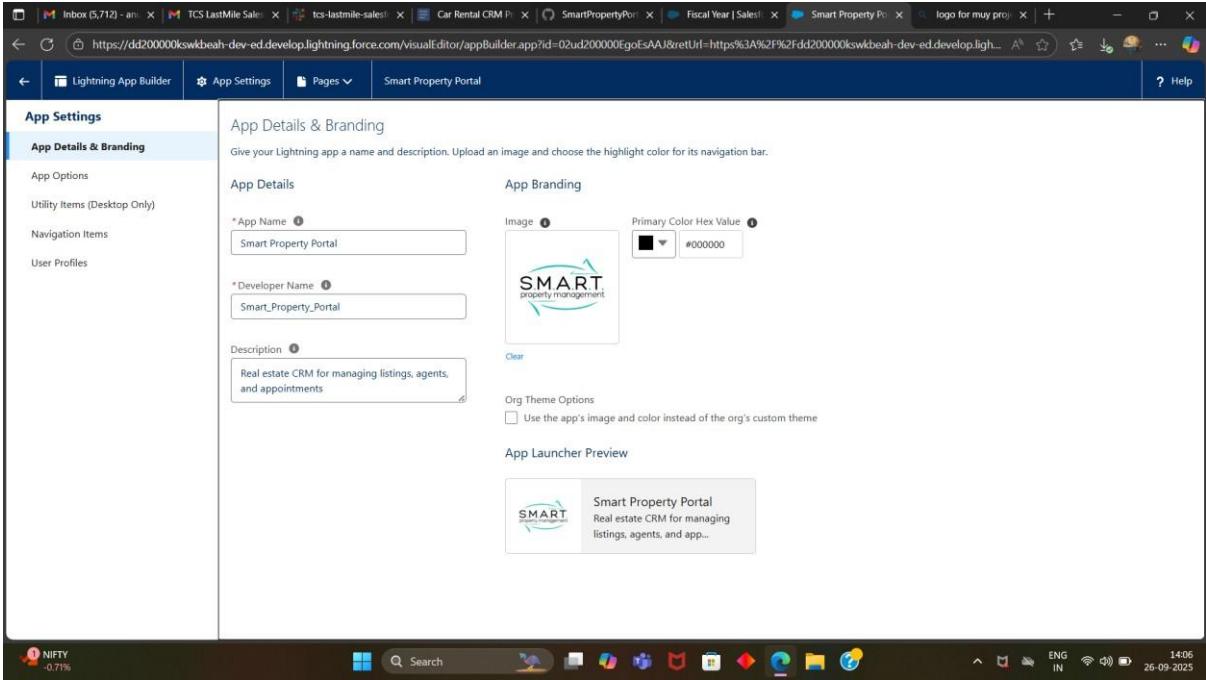


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App Launcher Branding

Configured App Launcher with logo and description

Screenshot:



https://drive.google.com/file/d/157P4U7S1kNDEO50aHRkzQ1o0RPdok1Gj/view?usp=drive_link

Summary

This phase lays the foundation for a scalable, secure, and role-based Salesforce CRM tailored for SmartPropertyPortal. All configurations were implemented in a real Developer Org and visually verified through screenshots.