Phase 2: Org Setup & Configuration

Salesforce Editions

- Use **Salesforce Sales Cloud (Developer Edition)** for development and testing.

- Chosen because the project needs **Lead, Opportunity (Deal), and Dashboard features**.

Company Profile Setup

- **Company Name:** Smart Property Portal Pvt. Ltd.

- **Currency:** INR (₹) → Required for property pricing and deal amounts.

- **Time zone:** IST (Indian Standard Time) → Ensures property visits and reminders align with local timings.

Business Hours & Holidays

- **Business Hours:** 9 AM – 7 PM (Mon–Sat) for sales agents to schedule property visits.

- **Holidays:** Add national holidays (e.g., Diwali, Independence Day) → Visit confirmations and deal follow-ups won't trigger on off days.

Fiscal Year Settings

- **Set Custom Fiscal Year: April–March** → Matches how real estate firms track yearly sales performance.

User Setup & Licenses

- **Sales Agents:** Handle property leads and schedule visits → Sales Cloud license.

- **Property Managers:** Maintain property inventory → Sales Cloud license.

- **Sales Managers:** Monitor pipeline and dashboards → Sales Cloud license.

- **System Admins:** Manage configurations → Admin license.

Profiles

- **Sales Agent Profile:** Can create and update leads, schedule visits, but cannot delete records.

- **Property Manager Profile:** Can edit property records but not financial data.

- **Sales Manager Profile:** Full access to reporting and pipeline management.

- **Admin Profile:** Full org-level permissions.

Roles

- **Top:** Sales Manager (oversees sales performance)

- **Middle:** Property Manager (updates property availability)

- **Bottom:** Sales Agent (manages leads and visits) Role hierarchy ensures managers see everything their team does, while agents see only their assigned records.

Permission Sets

- **Mobile Access:** Grant sales agent's permissions for Salesforce mobile app (important for on-site property visits).

- **Advanced Reporting:** Give managers enhanced dashboard/report building permissions.

- **Document Management:** Enable property managers to upload floor plans, agreements, etc.

Org-Wide Defaults (OWD)

- **Leads:** Private → Each agent only sees their leads.

- **Properties:** Public Read Only → All agents can view property listings but only managers can edit.

- **Deals:** Private → Only the assigned agent and manager can view deal details.

Sharing Rules

- Share **leads** among agents in the same territory.

- Allow **managers** to see all deals in their region.

Login Access Policies

- **Login Hours:** Restricted to business hours (9 AM–7 PM).

- **IP Restrictions:** Access only from office network + trusted devices.

- **Password Policy:** Strong complexity rules for data security.

Dev Org Setup

- Configure Developer Org with **custom objects** (Properties, Visits, Deals).

- Install **AppExchange apps** for SMS/Email reminders.

Sandbox Usage

- Use **Developer Sandbox** to test:

    - Automated lead assignment

    - Visit scheduling workflows

    - SMS/email reminders

- Deploy to production only after successful UAT (User Acceptance Testing).

Deployment Basics

- Use **Change Sets** to move tested configurations from Sandbox → Production.

- For advanced deployments, use **Salesforce CLI (SFDX)**.