

Project Title: Real Estate Property Management System

Phase 2 – Org Setup & Configuration

Objective

In this phase, I configured the Salesforce org to support the Real Estate Property Management system. The goal was to set up users, roles, permission sets, custom objects, and the Lightning app so that different users in the company can work with properties, tenants, and leases smoothly.

Steps I Followed

A. Company Information

I went to **Setup** → **Company Settings** → **Company Information**.

I updated the company details as:

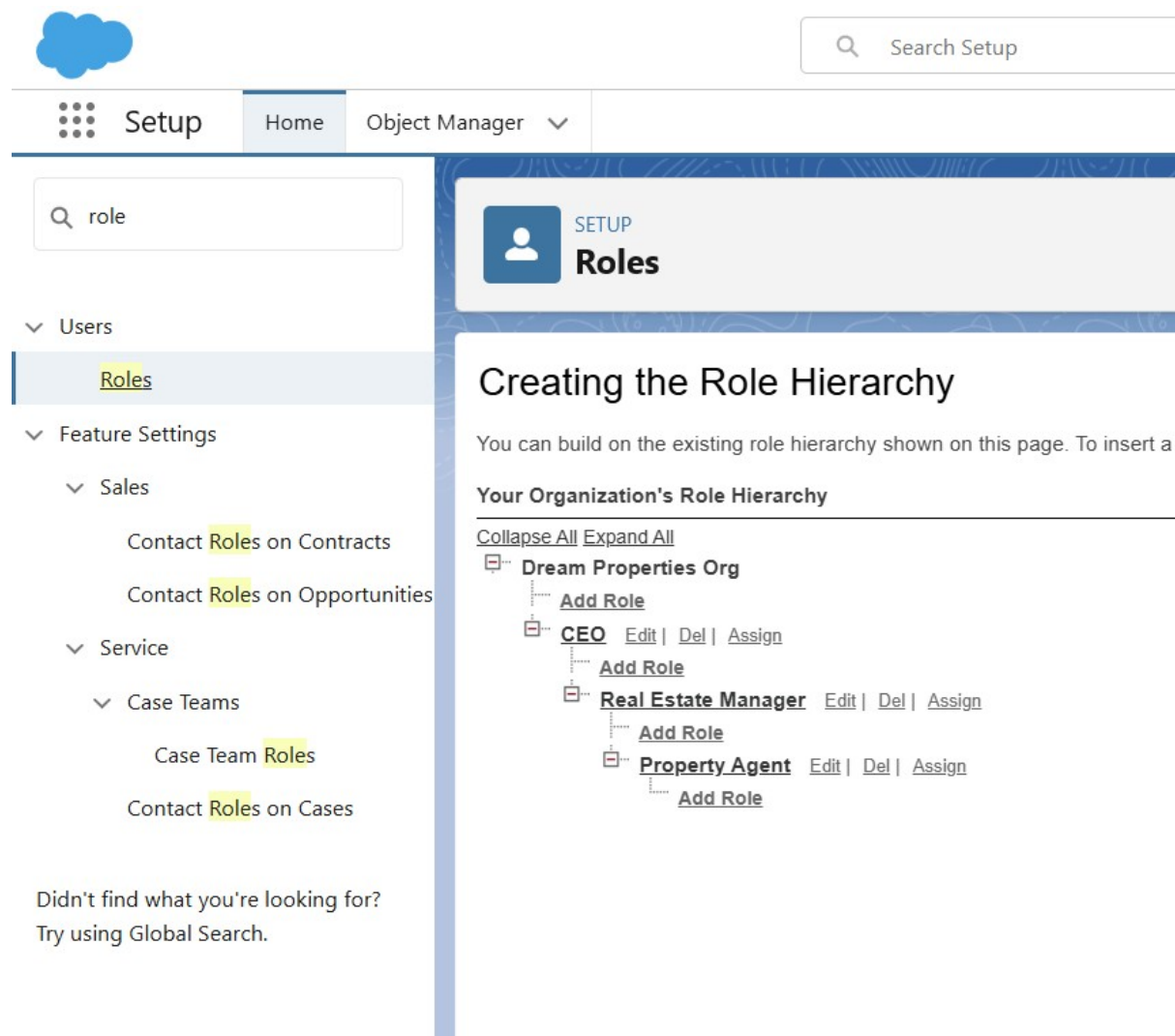
1. Company Name: *Dream Properties Pvt Ltd*
2. Time Zone: *GMT+5:30 (India Standard Time)*
3. Currency: *INR – Indian Rupee*
4. Fiscal Year: *Standard Fiscal Year (Starting April)*

After saving, the org was aligned with my project needs.

The screenshot shows the Salesforce Setup interface for 'Company Information'. The left sidebar contains navigation links: Setup, Home, Object Manager, and a search bar. The main content area is titled 'Company Information' and displays the organization's profile for 'Dream Properties Org'. The profile includes details such as Organization Name, Primary Contact, Division, Address, Fiscal Year Starts In, Activate Multiple Currencies, Enable Data Translation, Newsletter, Admin Newsletter, Hide Notices About System Maintenance, Hide Notices About System Downtime, Locale Formats, Phone, Fax, Default Locale, Default Language, Default Time Zone, Currency Locale, Used Data Space, Used File Space, API Requests, Last 24 Hours, Streaming API Events, Last 24 Hours, Restricted Logins, Current Month, Salesforce.com Organization ID, Organization Edition, and Instance. The 'Edit' button is visible next to the 'Organization Detail' section. The bottom of the page shows the 'Created By' and 'Modified By' information.

Organization Detail	
Organization Name	Dream Properties Org
Primary Contact	OrgFarm EPIC
Division	
Address	India
Fiscal Year Starts In	January
Activate Multiple Currencies	<input type="checkbox"/>
Enable Data Translation	<input type="checkbox"/>
Newsletter	<input checked="" type="checkbox"/>
Admin Newsletter	<input checked="" type="checkbox"/>
Hide Notices About System Maintenance	<input type="checkbox"/>
Hide Notices About System Downtime	<input type="checkbox"/>
Locale Formats	ICU
Phone	
Fax	
Default Locale	English (India)
Default Language	English
Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Currency Locale	Hindi (India) - INR
Used Data Space	372 KB (7%) View
Used File Space	17 KB (0%) View
API Requests, Last 24 Hours	40 (15,000 max)
Streaming API Events, Last 24 Hours	0 (10,000 max)
Restricted Logins, Current Month	0 (0 max)
Salesforce.com Organization ID	0009000008kwNu
Organization Edition	Developer Edition
Instance	USA1044

Created By: OrgFarm EPIC, 9/18/2025, 4:40 PM
Modified By: Dharmar Teja Garipally, 9/23/2025, 8:23 AM



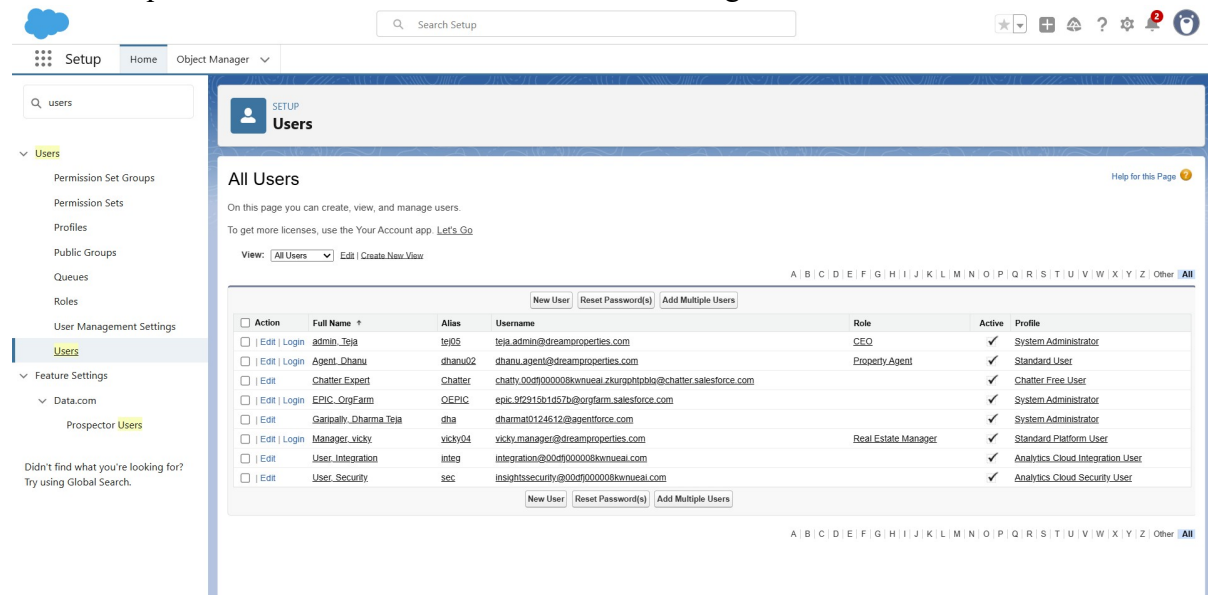
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C. Users

I created three users in **Setup** → **Users** → **New User**:

- Teja Admin (System Administrator, Admin role)
- Vicky Manager (Standard User, Sales Manager role)
- Dhanu Agent (Standard User, Sales Agent role)

I used unique email-format usernames for each and assigned licenses as Salesforce.



D. Permission Sets

To give access to my custom objects, I created a permission set called **Property Access**.

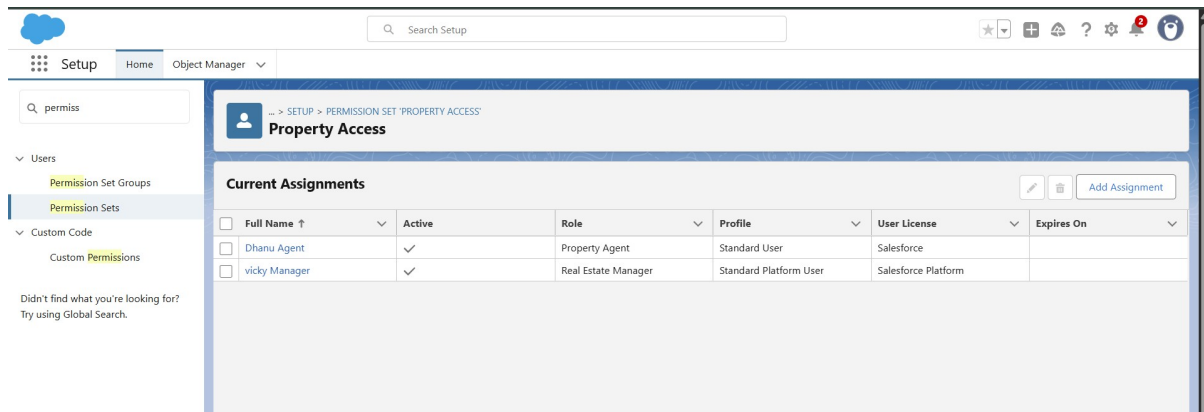
I added CRUD (Create, Read, Edit, Delete) permissions for:

- Property
- Tenant
- Lease

I then assigned this permission set to *Sales Agent* and *Sales Manager*.

This allowed them to manage records without modifying profiles.

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E. Custom Objects & Fields

I created three custom objects under **Object Manager**:

- Property
 - Auto-numbered Property ID (PROP-{0000})
- Tenant
 - Auto-numbered Tenant ID (TEN-{0000})
- Lease
 - Auto-numbered Lease ID (LEASE-{0000})

For **Property**, I added:

- Location: (Text Area)
- City: (Text)
- Rental Amount: (Currency)
- No. of Bedrooms: (Number)
- Status: (Picklist - Available, Occupied, Under Maintenance)

For **Tenant**, I added:

- First Name, Last Name (Text)
- Email (Unique Email field)
- Phone (Phone)
- Property (Lookup → Property)
- Lease (Lookup → Lease)
- Output in en_GB.

For **Lease**, I added:

- Property (Lookup → Property)
- Tenant (Lookup → Tenant)
- Start Date, End Date (Date fields)
- Monthly Rent (Currency)
- Status (Picklist: Active, Terminated, Pending)

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I also set **Field-Level Security** so all profiles could see the fields, and added them to **page layouts**.

SETUP > OBJECT MANAGER

Property

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Fields & Relationships

11 Items, Sorted by Field Label

Q Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City__c	Text(10)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Lease	Lease__c	Lookup(Lease)		✓
Location	Location__c	Text Area(255)		
No. of Bedrooms	No_of_Bedrooms__c	Number(10, 0)		
Owner	OwnerId	Lookup(User,Group)		✓
Property ID	Name	Auto Number		✓
Rental Amount	Rental_Amount__c	Currency(16, 2)		
Status	Status__c	Picklist		
Tenant	Tenant__c	Lookup(Tenant)		✓

Q Search Setup

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Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Property

Details

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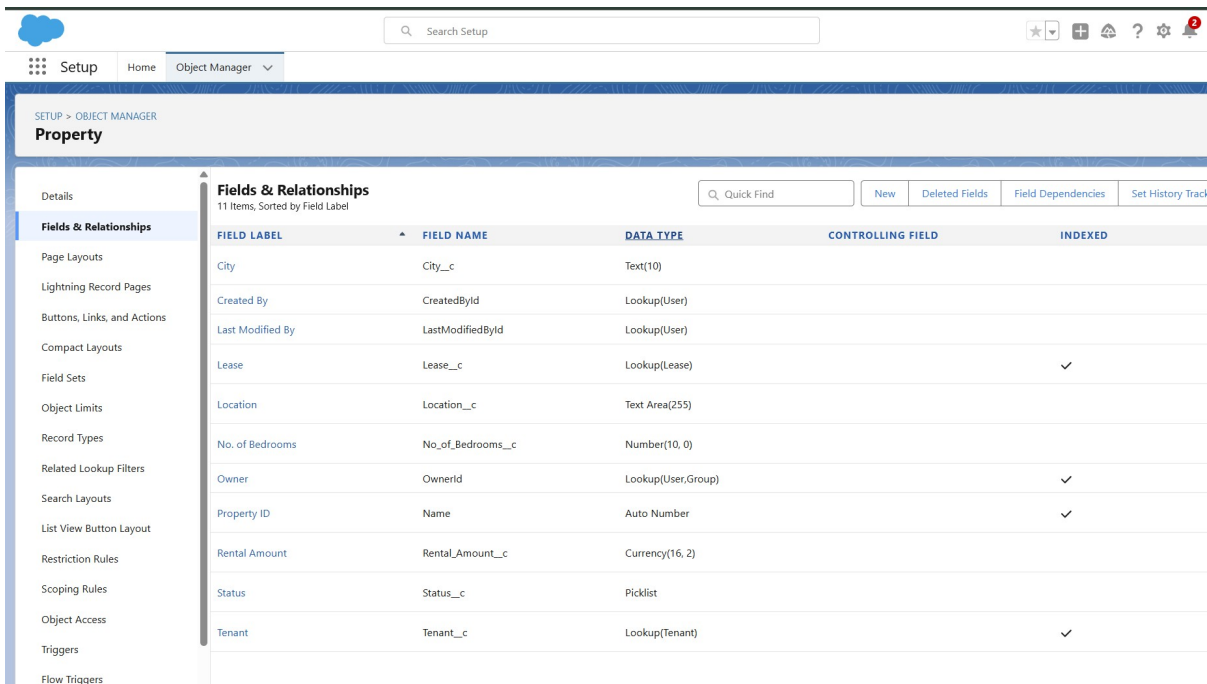
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City__c	Text(10)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Lease	Lease__c	Lookup(Lease)		✓
Location	Location__c	Text Area(255)		
No. of Bedrooms	No_of_Bedrooms__c	Number(10, 0)		
Owner	OwnerId	Lookup(User,Group)		✓
Property ID	Name	Auto Number		✓
Rental Amount	Rental_Amount__c	Currency(16, 2)		
Status	Status__c	Picklist		
Tenant	Tenant__c	Lookup(Tenant)		✓

Setup

Home

Object Manager

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FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City__c	Text(10)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Lease	Lease__c	Lookup(Lease)		✓
Location	Location__c	Text Area(255)		
No. of Bedrooms	No_of_Bedrooms__c	Number(10, 0)		
Owner	OwnerId	Lookup(User,Group)		✓
Property ID	Name	Auto Number		✓
Rental Amount	Rental_Amount__c	Currency(16, 2)		
Status	Status__c	Picklist		
Tenant	Tenant__c	Lookup(Tenant)		✓

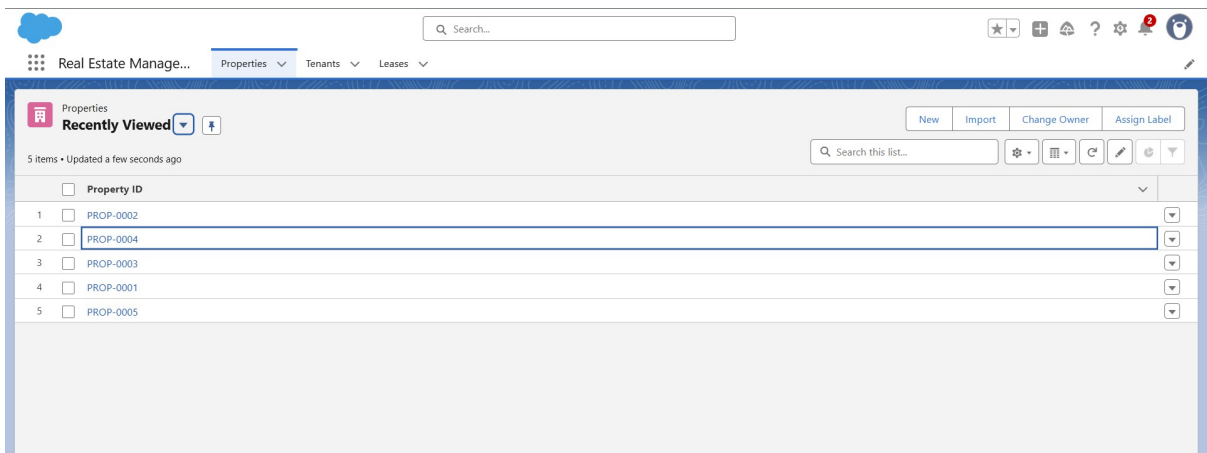
F. Lightning App

I created a **Lightning App** named *Property Management*.

I selected **Standard Navigation** and added the following items:

- Properties
- Tenants
- Leases

I assigned the app to all users so they could easily navigate.



Property ID
1 PROP-0002
2 PROP-0004
3 PROP-0003
4 PROP-0001
5 PROP-0005

G. Data Import

Using the **Data Import Wizard**, I uploaded sample CSV files for:

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- Properties (5 records)
- Tenants (5 records)
- Leases (5 records linked through lookups)

I made sure to map all fields correctly and verify successful imports.

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Search...

Search

Switch to Lightning Experience

Dharma Teja Garl...

Setup

Help

Quick Find / Search...

Expand All | Collapse All

Salesforce Mobile Quick Start

Home

Administrator

- Release Updates
- Manage Users
- Manage Apps
- Manage Territories
- Company Profile
- Data Classification
- Privacy Center
- Security Controls
- Domain Management
- Communication Templates
- Translation Workbench
- Data Management
- Mobile Administration
- Desktop Administration
- Outlook Integration and Sync
- Gmail Integration and Sync
- Email Administration
- Google Apps
- Analytics
- Data.com Administration

Build

Customize

Bulk Data Load Job

750fj000006XhE1

View the details of a bulk data load job.

[Back to List: Bulk Data Load Jobs](#)

Bulk Data Load Job Detail

Reload

Job ID	750fj000006XhE1	Job Type	Bulk V1	Status	Closed
Submitted By	Dharma Teja Garipally	Operation	Insert	Total Processing Time (ms)	82
Start Time	9/23/2025, 9:46 AM PST	Queued Batches	0	API Active Processing Time (ms)	41
End Time	9/23/2025, 9:46 AM PST	In Progress Batches	0	Apex Processing Time (ms)	0
Time to Complete (hh:mm:ss)	00:00	Completed Batches	1	Progress	100%
Object	Tenant	Failed Batches	0	Records Processed	5
External ID Field		Records Failed	0	Retries	0
Content Type	CSV				
Concurrency Mode	Parallel				
API Version	64.0				

Reload

Batches

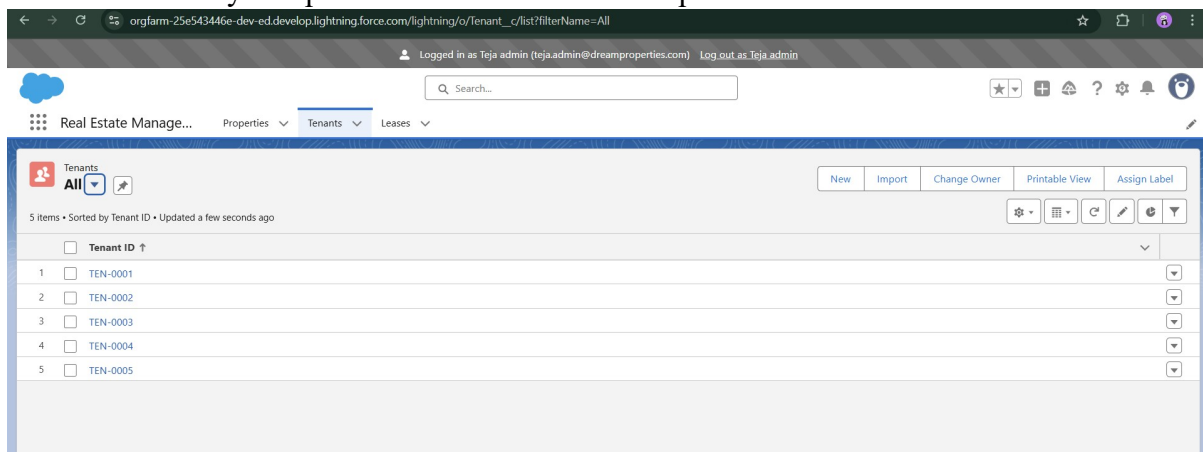
View Request	View Result	Batch ID	Start Time	End Time	Total Processing Time (ms)	API Active Processing Time (ms)	Apex Processing Time (ms)	Records Processed	Records Failed	Retry Count	State Message	Status
View Request	View Result	751fj000004UJ47	9/23/2025, 9:46 AM	9/23/2025, 9:46 AM	82	41	0	5	0	0		Completed

Testing

I tested access by logging in as different users:

- Dhanu Agent:
 - could view and create Tenants linked to Properties
- Vicky Manager:
 - could view all Properties and update Tenant details
- Teja Admin:
 - had full access and could assign permission sets

The role hierarchy and permission sets worked as expected.



The screenshot shows the Salesforce Tenants list page. The page includes a sidebar with navigation links for Real Estate Manage... and a table of tenants.

Tenant ID
TEN-0001
TEN-0002
TEN-0003
TEN-0004
TEN-0005

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Deliverables

Screenshots for each step (Company Info, Roles, Users, Permission Sets, Objects, App, Data Import).

CSV files of sample data.

Documentation of roles, users, and permission set assignments.

Conclusion

By completing Phase 2, I set up the Salesforce org with the required users, roles, permission sets, and objects. I also created a Lightning App to bring everything together for navigation.