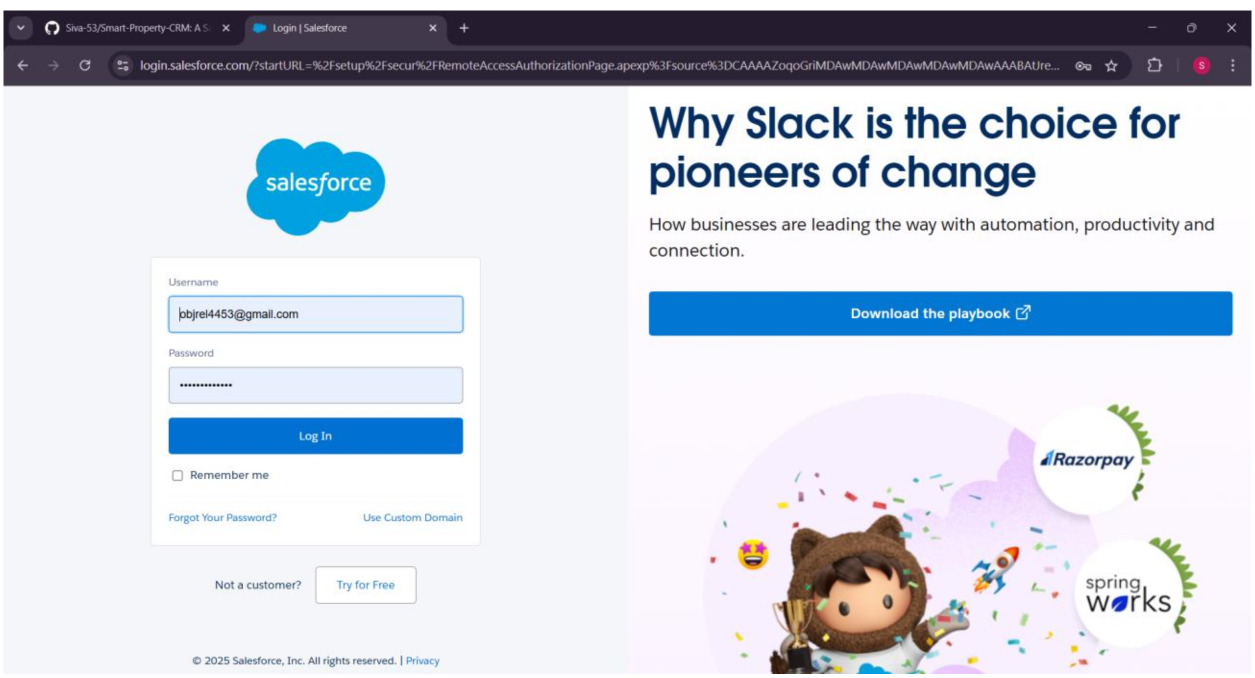
Phase 2: Org Setup & Configuration

Project: Smart Property Portal – Real Estate Customer Engagement & Lead Conversion System

1. Salesforce Edition Selection

Salesforce offers multiple editions, each with varying features. For this project, the **Enterprise Edition** was selected because it provides:

- Advanced automation tools such as **Process Builder** and **Flow Builder**.
- Complex **role hierarchies** and sharing rules.
- API access for integration with external property systems.
- Support for multiple **record types** and custom objects for property management.



2. Company Profile Setup

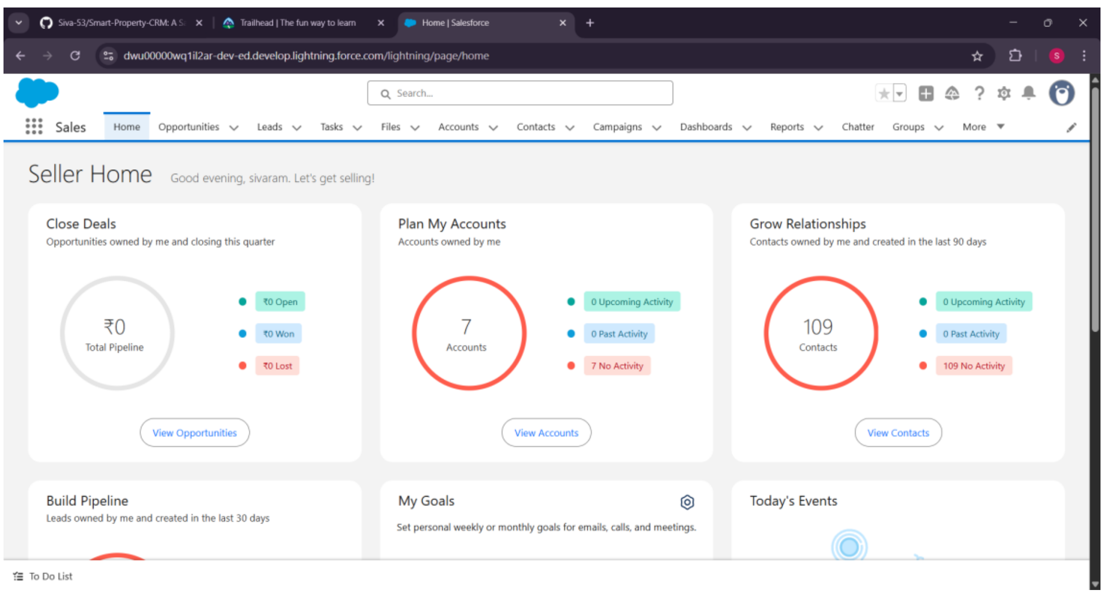
The company profile was configured to match the real estate business operational requirements:

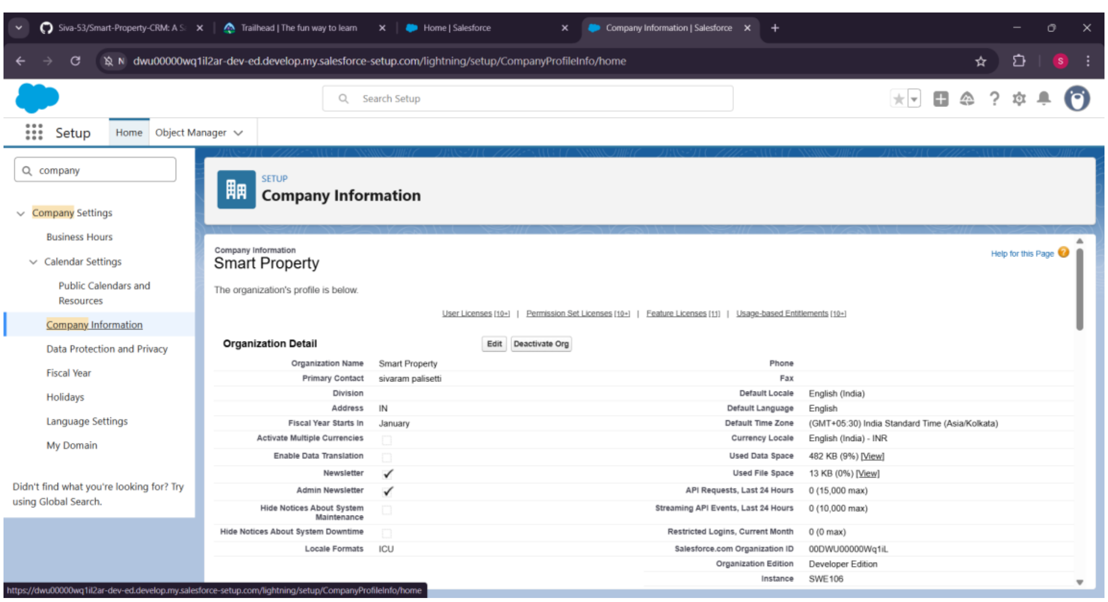
- **Business Hours:** Monday – Saturday, 9 AM – 7 PM.
- **Holidays:** Public and company-specific holidays defined.
- **Fiscal Year:** Customized to align with the real estate sales cycle.

This ensures accurate performance reporting and correct automation timings.

3. User Setup & Licenses

Different user types were created to match responsibilities:





User Type	Profile	Purpose
Sales Agent	Sales Cloud User	Capture leads, schedule visits, manage deals.
Property Manager	Custom Profile	Manage property inventory, oversee schedules.
System Administrator	System Admin	Full access for configuration and deployment.

Key Points:

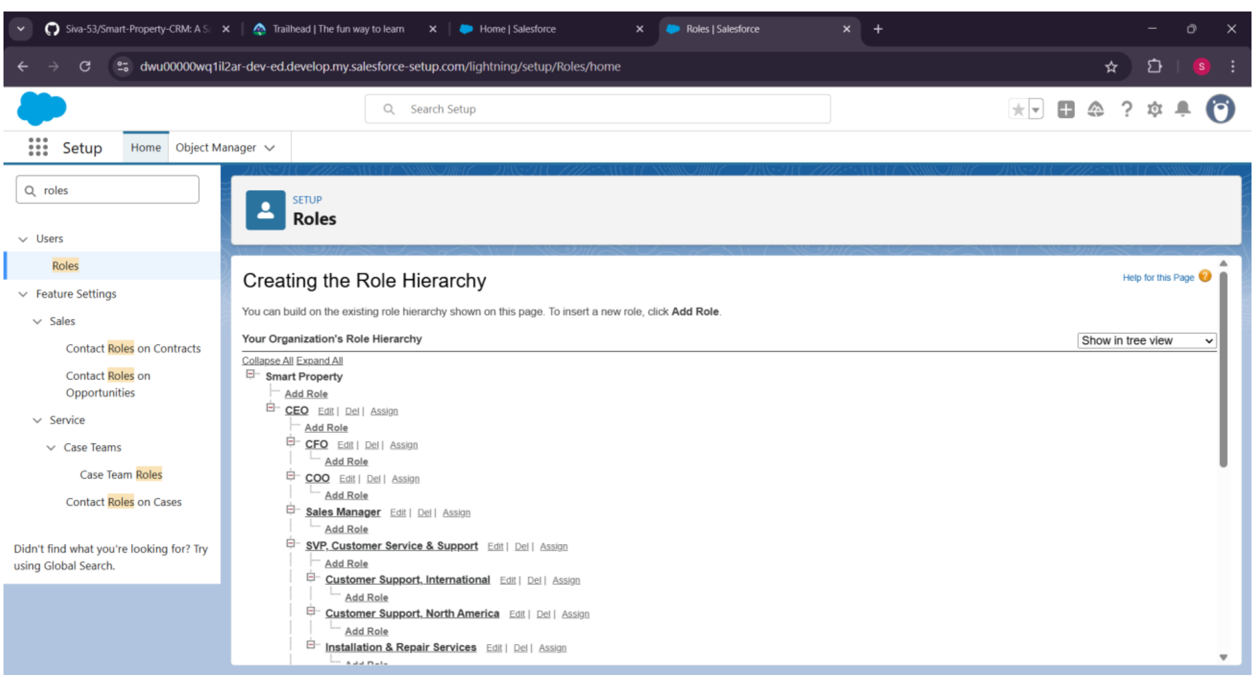
- Licenses were allocated carefully to optimize cost.
- Profiles and permission sets ensure access is limited to what each user needs.

4. Profiles, Roles & Permission Sets

Profiles define baseline permissions for users.
Roles reflect organizational hierarchy:

CEO
└── Sales Manager
  └── Sales Agent

Permission Sets were used for special scenarios, e.g., temporary access to property updates.



5. Organization-Wide Defaults (OWD) & Sharing Rules

OWD Settings:

- **Leads & Opportunities:** Private to ensure customer data security.
- **Contacts:** Controlled by parent.

Sharing Rules:

- Assigned leads based on **territory/region**, allowing agents to view only relevant leads.
- Ensured efficiency in lead assignment while maintaining strict data security.

6. Sandbox Usage & Deployment Basics

To maintain stability during customization:

- **Developer Sandbox** created for development and testing.
- All configuration changes tested in Sandbox first.
- Deployment to Production was done using **Change Sets**, minimizing risk.

Sandbox Benefits:

- Safe environment to test validation rules, workflows, and custom objects.
- Avoids disruptions in the live production environment.

7. Summary

Phase 2 focused on establishing the foundational Salesforce environment:

- Selected **Enterprise Edition** for advanced features.
- Configured **company profile**, **business hours**, and **fiscal year**.
- Created **user profiles, roles, and permission sets** aligned to responsibilities.
- Implemented **OWD and sharing rules** for secure data access.
- Set up **Sandbox** for testing and controlled **deployment** to Production.

This setup ensures the system is secure, scalable, and ready for automation and data modeling in subsequent phases.