



Salesforce PropertyHub

By:- Sushmita Katariya


Phase 2: Org Setup & Configuration

This phase focused on establishing the foundational settings and user structure within the Salesforce Developer Edition org to support the PropertyHub application.

Company Profile Setup

Set basic org details under *Setup* → *Company Information* → *Edit*:

- **Name:** Salesforce PropertyHub
- **Time Zone:** ((GMT+05:30) India Standard Time (Asia/Kolkata)
- **Locale:** English (India)
- **Language:** English
- **Currency:** Indian Rupee

 **SETUP**

Company Information

Company Information

Salesforce PropertyHub

The organization's profile is below.

[User Licenses \[10+\]](#) | [Permission Set Licenses \[10+\]](#) | [Feature Licenses \[11\]](#) | [Usage-based Entitlements \[10+\]](#)

Organization Detail

Edit

Currency Setup

Organization Name	Salesforce PropertyHub	Phone	
Primary Contact	Sushmita Katariya	Fax	
Division		Default Locale	English (India)
Address	India	Default Language	English
Fiscal Year Starts In	January	Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Activate Multiple Currencies	<input checked="" type="checkbox"/>	Corporate Currency	Indian Rupee
Enable Data Translation	<input type="checkbox"/>	Used Data Space	366 KB (7%) View
Newsletter	<input checked="" type="checkbox"/>	Used File Space	17 KB (0%) View
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	0 (15,000 max)
Hide Notices About System Maintenance	<input type="checkbox"/>	Streaming API Events, Last 24 Hours	0 (10,000 max)
Hide Notices About System Downtime	<input type="checkbox"/>	Restricted Logins, Current Month	0 (0 max)
Locale Formats	ICU	Salesforce.com Organization ID	00DgL000000BAIk5
		Organization Edition	Developer Edition
		Instance	CAN98

Created By

OrgFarm EPIC, 9/8/2025, 3:16 PM

Modified By

Sushmita Katariya, 9/13/2025, 6:12 AM

Business Hours Setup

Configure working hours for escalation rules and SLA tracking:

- **Path:** *Setup → Business Hours → New.*
- **Name:** Standard PropertyHub Business Hours
- **Time Zone:** (GMT-05:00) Eastern Standard Time (America/New_York)
- **Working Hours:** Mon–Fri 9:00 AM–6:00 PM; Saturday and Sunday closed.
- **Save:** Applied as default.

The screenshot shows the 'Business Hours' setup page in Salesforce. At the top, there's a 'SETUP' icon and the title 'Business Hours'. Below this, a message states: 'If you enter blank business hours for a day, that means your organization does not operate on that day.' The main section is titled 'Business Hours Edit' and includes 'Save' and 'Cancel' buttons. It is divided into three steps: Step 1. Business Hours Name, Step 2. Time Zone, and Step 3. Business Hours. In Step 1, the 'Business Hours Name' is 'PropertyHub Business Hour', 'Active' is checked, and 'Use these business hours as the default' is also checked. Step 2 shows the 'Time Zone' set to '(GMT+05:30) India Standard Time (Asia/Colombo)'. Step 3 displays a table for setting hours for each day of the week. The table has columns for the day, start time (HH:MM), end time (HH:MM), and a checkbox for '24 hours'. The current settings are: Sunday (blank), Monday (9:00 AM to 5:00 PM), Tuesday (9:00 AM to 5:00 PM), Wednesday (9:00 AM to 5:00 PM), Thursday (9:00 AM to 5:00 PM), Friday (9:00 AM to 5:00 PM), and Saturday (blank). 'Save' and 'Cancel' buttons are at the bottom.

Day	Start Time (HH:MM)	End Time (HH:MM)	24 hours
Sunday			<input type="checkbox"/>
Monday	9:00 AM	5:00 PM	<input type="checkbox"/>
Tuesday	9:00 AM	5:00 PM	<input type="checkbox"/>
Wednesday	9:00 AM	5:00 PM	<input type="checkbox"/>
Thursday	9:00 AM	5:00 PM	<input type="checkbox"/>
Friday	9:00 AM	5:00 PM	<input type="checkbox"/>
Saturday			<input type="checkbox"/>

Fiscal Year Setup

Defines reporting boundaries for forecasts and opportunities.

- **Path:** *Setup → Fiscal Year.*
- **Type:** Standard Fiscal Year (Jan–Dec)
- **Configuration:** Starting month set to *January*.
- **Save:** Applied settings to define fiscal periods.

The screenshot shows the 'Fiscal Year' setup page in Salesforce. At the top, there's a 'SETUP' icon and the title 'Fiscal Year'. Below this, the page is titled 'Organization Fiscal Year Edit: Salesforce PropertyHub'. A message states: 'To specify the fiscal year type for your organization, choose one of the options below.' There are two radio buttons: 'Standard Fiscal Year' (selected) and 'Custom Fiscal Year'. A 'Fiscal Year Information' section explains that the organization can change the fiscal year start month and specify whether the fiscal year name is set to the starting or ending year. A warning message states: '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.' Below this is the 'Change Fiscal Year Period' section, which includes 'Save' and 'Cancel' buttons. It shows the 'Name' as 'Salesforce PropertyHub', the 'Fiscal Year Start Month' as 'January', and 'Fiscal Year is Based On' as 'The starting month' (selected). 'Save' and 'Cancel' buttons are at the bottom.

Option
<input checked="" type="radio"/> Standard Fiscal Year
<input type="radio"/> Custom Fiscal Year

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.

Change Fiscal Year Period


Name: Salesforce PropertyHub

Fiscal Year Start Month: January

Fiscal Year is Based On: ☒ The starting month

User Setup (Profiles, Roles, Permission Sets, Users)

- **Profiles:** Cloned standard profiles to create custom ones for baseline access.
 - *PropertyHub_Agent, PropertyHub_Manager, PropertyHub_Finance* (to be tuned later with object permissions).
- **Roles:** Defined role hierarchy for access and reporting.
 - *CEO, Property Manager, Sales Agent, Finance Manager.*
- **Permission Sets:** Created *Payment_Access_PS* for Finance (object permissions to be added once Payment object exists).
- **Users:** Added sample users with respective profiles and roles.
 - agent1 → PropertyHub_Agent, Role: Sales Agent
 - manager1 → PropertyHub_Manager, Role: Property Manager
 - finance1 → PropertyHub_Finance, Role: Finance Manager

 **SETUP**
Profiles

Profile

Smart_Property_Portal_Agent


Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges \[0\]](#) | [Enabled Apex Class Access \[0\]](#) | [Enabled Visualforce Page Access \[0\]](#) | [Enabled External Data Source Access \[0\]](#) | [Enabled Named Credential Access \[0\]](#) | [Enabled External Credential Principal Access \[0\]](#) | [Enabled Custom Metadata Type Access \[0\]](#) | [Enabled Custom Setting Definitions Access \[0\]](#) | [Enabled Flow Access \[0\]](#) | [Enabled Service Presence Status Access \[0\]](#) | [Enabled Custom Permissions \[0\]](#)

Profile Detail [Edit](#) [Clone](#) [Delete](#) [View Users](#)

Name	Smart_Property_Portal_Agent		
User License	Salesforce	Custom Profile	<input checked="" type="checkbox"/>
Description			
Created By	Sushmita Katariya , 9/11/2025, 11:26 PM	Modified By	Sushmita Katariya , 9/13/2025, 6:38 AM

 **SETUP**
Users

User

Sales Agent

[Permission Set Assignments \[0\]](#) | [Permission Set Assignments: Activation Required \[0\]](#) | [Permission Set Group Assignments \[0\]](#) | [Permission Set License Assignments \[0\]](#) | [Personal Groups \[0\]](#) | [Public Group Membership \[0\]](#) | [Queue Membership \[0\]](#) | [Team \[0\]](#) | [Managers in the Role Hierarchy \[1\]](#) | [Assigned Territories \[0\]](#) | [OAuth Apps \[0\]](#) | [Third-Party Account Links \[0\]](#) | [Built-in Authenticators \[0\]](#) | [Installed Mobile Apps \[0\]](#) | [Authentication Settings for External Systems \[0\]](#) | [Login History \[0+\]](#) | [User Provisioning Accounts \[0\]](#)

User Detail [Edit](#) [Sharing](#) [Reset Password](#) [Freeze](#) [View Summary](#)

Name	Sales Agent	Role	Eastern Sales Team
Alias	sAgent	User License	Salesforce Platform
Email	sales.agent@myorg.com Verify i	Profile	Standard Platform User
Username	sales.agent@myorg.com	Active	<input checked="" type="checkbox"/>
Nickname	User17575670573538216158 i	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (United States)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Currency	INR - Indian Rupee	Data.com User Type	i
Delegated Approver		Accessibility Mode (Classic Only)	<input type="checkbox"/> i
Manager		Debug Mode	<input type="checkbox"/> i

Role Hierarchy Setup

Defines data visibility and reporting structure within the org.

Path: Setup → Roles → Set Up Roles.

Top-Level Role: CEO (root of hierarchy).

Property Manager Role: Added as child of CEO.

Sales Agent Role: Added as child under Property Manager.

Finance Manager Role: Added as sibling under CEO.

Resulting Hierarchy (example):

CEO → Property Manager → Sale Agent

CEO → Finance Manager

The screenshot shows the Salesforce 'Users' page. At the top, there's a 'SETUP Users' header. Below it, the user 'finance user' is selected. A navigation bar shows various assignment tabs: 'Permission Set Assignments (2)', 'Permission Set Assignments: Activation Required (0)', 'Permission Set Group Assignments (0)', 'Permission Set License Assignments (1)', and 'Personal Groups (0)'. The 'Permission Set Assignments' tab is active, displaying a table with two entries:

Action	Permission Set Name	Date Assigned	Expires On
Del	Payments Administrator	9/17/2025	
Del	PropertyHub User	9/17/2025	

Below the table, the user's profile details are shown in a form. Fields include Email (doctor@myorg.com), Username (sush_testuse160120004@gmail.com), Nickname (User1757567409940546608), Title, Company, Department, Division, Address, Time Zone ((GMT+05:30) India Standard Time (Asia/Kolkata)), Locale (English (United States)), Language (English), Currency (INR - Indian Rupee), and Delegated Approver. On the right side of the profile, there are checkboxes for various user types: Standard Platform User (checked), Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Push Registrations (with a 'View' link), Data.com User Type, and Accessibility Mode (Classic Only).

OWD (Org Wide Default)

This has to be done in Phase 3, as the OWD settings are needed to be applied on custom objects which will be implemented in the next phase of the project.


Sharing Rule

This has to be done in Phase 3 as well, considering it has to be implemented on an object.

Assign Permission Set(s)

After creating users, assign the permission set for finance (when Payment object exists):

Setup → Quick Find → Users → click the finance user → Permission Set Assignments → Edit Assignments → add Payment_Access_PS → Save.



SETUP

Roles

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

Your Organization's Role Hierarchy

Show in tree view ▾

[Collapse All](#) [Expand All](#)

- Salesforce PropertyHub

 - Add Role
 - CEO

Edit | Del | Assign

 - Add Role
 - CFO

Edit | Del | Assign

 - Add Role
 - COO

Edit | Del | Assign

 - Add Role
 - Finance Manager

Edit | Del | Assign

 - Add Role
 - Head of Medicine

Edit | Del | Assign

 - Add Role
 - Head of Operations

Edit | Del | Assign

 - Add Role
 - Property Manager

Edit | Del | Assign

 - Add Role
 - SVP, Customer Service & Support

Edit | Del | Assign

 - Add Role
 - SVP, Human Resources

Edit | Del | Assign

 - Add Role
 - SVP, Sales & Marketing

Edit | Del | Assign

 - Add Role

Dev Org Setup

- To implement this project, a Salesforce Developer Edition org was set up.
- A GitHub Repository was created for source control.
- VS Code and SFDX were set up for the implementation of the LWC components for development.

Next Steps: Phase 3

With the organizational foundation complete, development will begin on the core functionality:

- Custom Object Creation (Property, Visit, Offer)
- Automation via Flows and Apex Triggers
- Configuring OWD and Sharing Rules for objects
- Building the Lightning App and custom Lightning Web Components (LWC)