



# 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 PropertHub
- **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

Help for this Page

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%) <a href="#">View</a>
Newsletter	<input checked="" type="checkbox"/>	Used File Space	17 KB (0%) <a href="#">View</a>
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	00DgL00000BAIk5
		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. At the top, there's a 'SETUP' tab and a 'Business Hours' title. 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 form is titled 'Business Hours Edit' and has '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. In Step 2, the 'Time Zone' is '(GMT+05:30) India Standard Time (Asia/Colombo)'. In Step 3, there are input fields for each day of the week (Sunday through Saturday) to set business hours from HH:MM to HH:MM, with a checkbox for '24 hours' next to each. At the bottom of Step 3, there are 'Save' and 'Cancel' buttons.

## 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. At the top, there's a 'SETUP' tab and a 'Fiscal Year' title. 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 yellow warning box 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, there's a 'Change Fiscal Year Period' section with 'Save' and 'Cancel' buttons. It includes a 'Name' field (Salesforce PropertyHub), a 'Fiscal Year Start Month' dropdown (set to January), and a 'Fiscal Year is Based On' section with two radio buttons: 'The ending month' and 'The starting month' (selected). At the bottom of this section, there are 'Save' and 'Cancel' buttons.

## 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

Help for this Page ?


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

User Profile Help for this Page ?

[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	<a href="mailto:sales.agent@myorg.com">sales.agent@myorg.com</a> <a href="#">[Verify]</a> <a href="#">i</a>	Profile	Standard Platform User
Username	sales.agent@myorg.com	Active	<input checked="" type="checkbox"/>
Nickname	User17575670573538216158 <a href="#">i</a>	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	<a href="#">View</a>
Currency	INR - Indian Rupee	Data.com User Type	<a href="#">i</a>
Delegated Approver		Accessibility Mode (Classic Only)	<input type="checkbox"/> <a href="#">i</a>
Manager		Debug Mode	<input type="checkbox"/> <a href="#">i</a>

## 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' setup page for a user named 'finance user'. The page has a top navigation bar with a 'Users' tab and a 'SETUP' button. Below the navigation bar, there's a breadcrumb trail: 'User' > 'finance user'. To the right of the breadcrumb, there's a 'User Profile Help for this Page' link. Below the breadcrumb, there's a section for 'Permission Set Assignments' with an 'Edit Assignments' button. This section contains a table with columns: 'Action', 'Permission Set Name', 'Date Assigned', and 'Expires On'. The table has two rows: one for 'Payments Administrator' assigned on 9/17/2025, and another for 'PropertyHub User' also assigned on 9/17/2025. Below the table, there's a 'Delegated Approver' section. The main body of the page is a form for the user's profile, with fields for '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), 'Profile' (Standard Platform User), 'Active' (checked), 'Marketing User' (unchecked), 'Offline User' (unchecked), 'Knowledge User' (unchecked), 'Flow User' (unchecked), 'Service Cloud User' (unchecked), 'Site.com Contributor User' (unchecked), 'Site.com Publisher User' (unchecked), 'WDC User' (unchecked), 'Mobile Push Registrations' (View), 'Data.com User Type' (i), and 'Accessibility Mode (Classic Only)' (unchecked).

## 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.

