Salesforce PropertyHub

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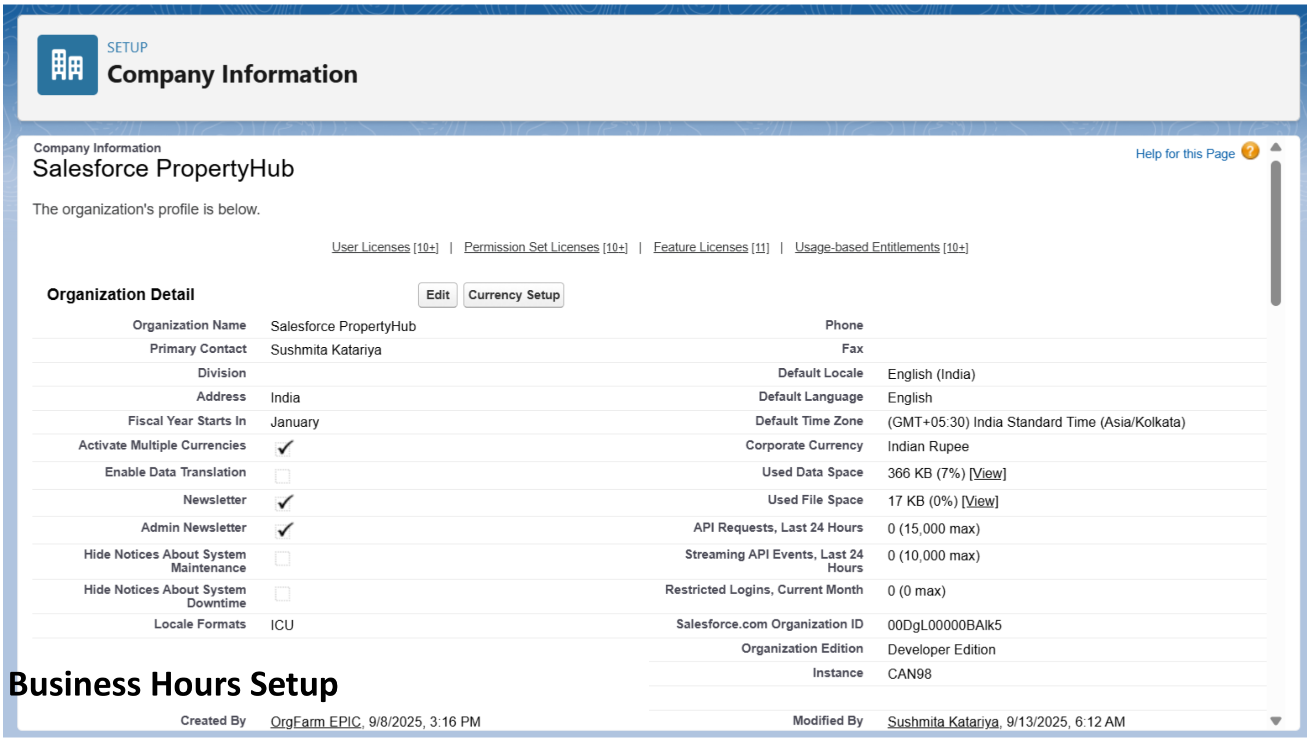
Phase 2: Org Setup & Configuration

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*:

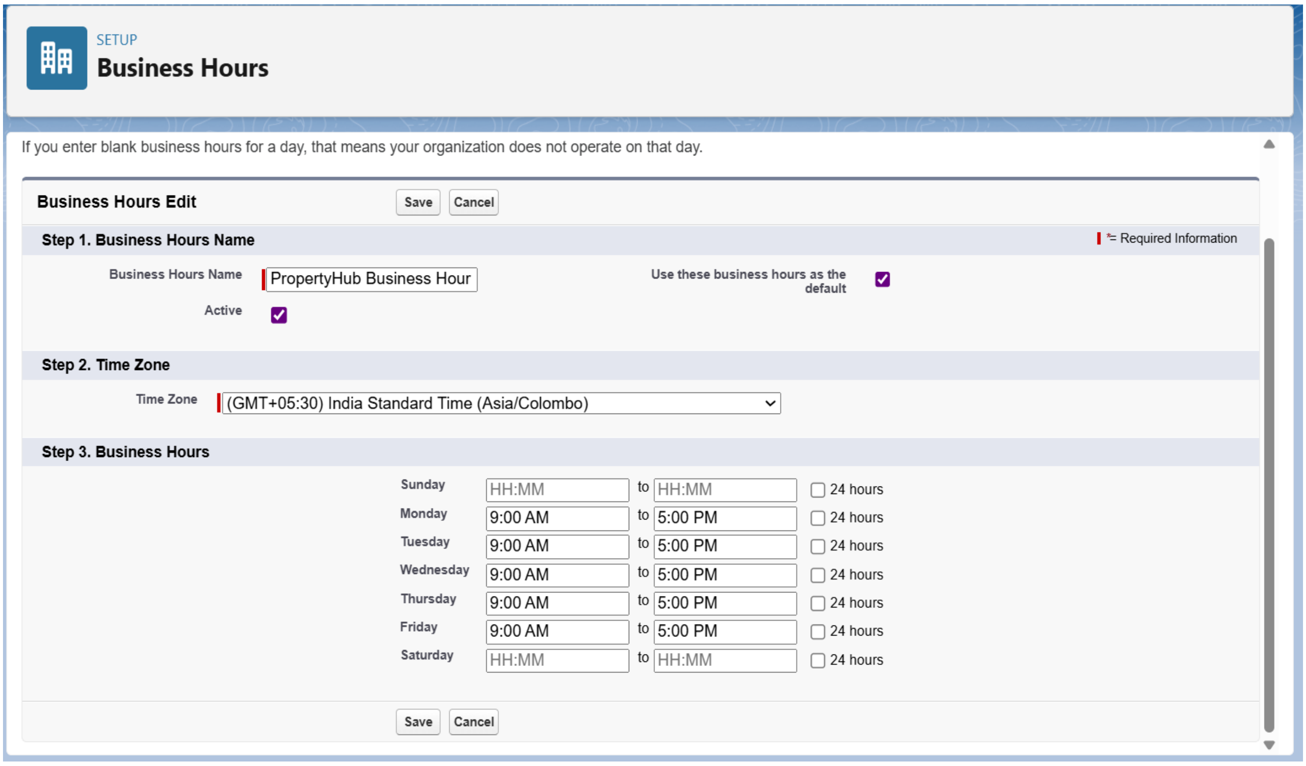
- **Name**: Salesforce PropertHub
- **Time Zone**: ((GMT+05:30) India Standard Time (Asia/Kolkata)
- **Locale**: English (India)
- **Language**: English
- **Currency**: Indian Rupee



Business Hours Setup

Configure working hours for escalation rules and SLA tracking:

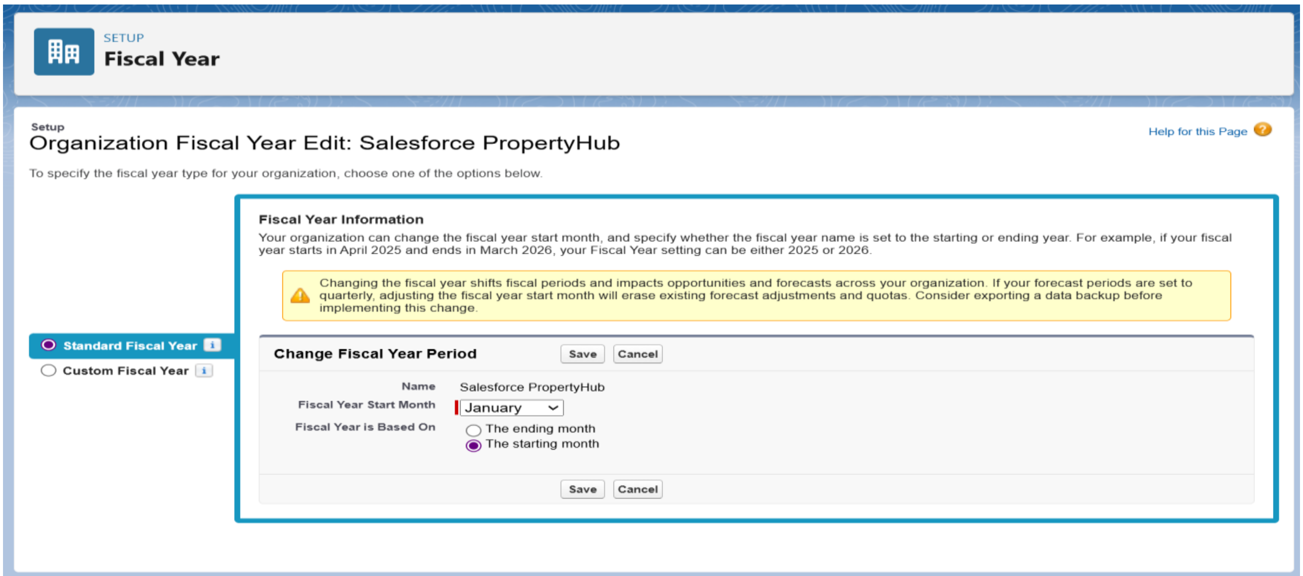
- **Path**: *Setup → Business Hours → New*.
- **Name**: Standard PropertyHub Business Hours
- **Time Zone**: (GMT-05:00) Eastern Standard Time (America/New_York)
- **Working Hours**: Mon–Fri 9:00 AM–6:00 PM; Saturday and Sunday closed.
- **Save**: Applied as default.



Fiscal Year Setup

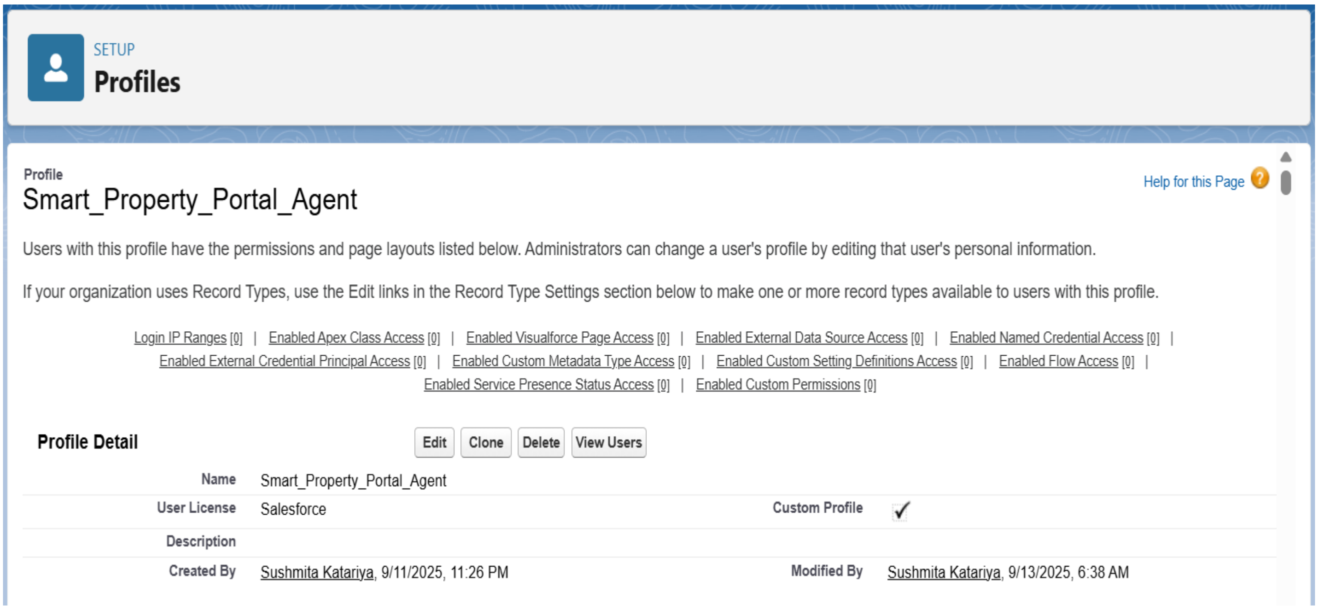
Defines reporting boundaries for forecasts and opportunities.

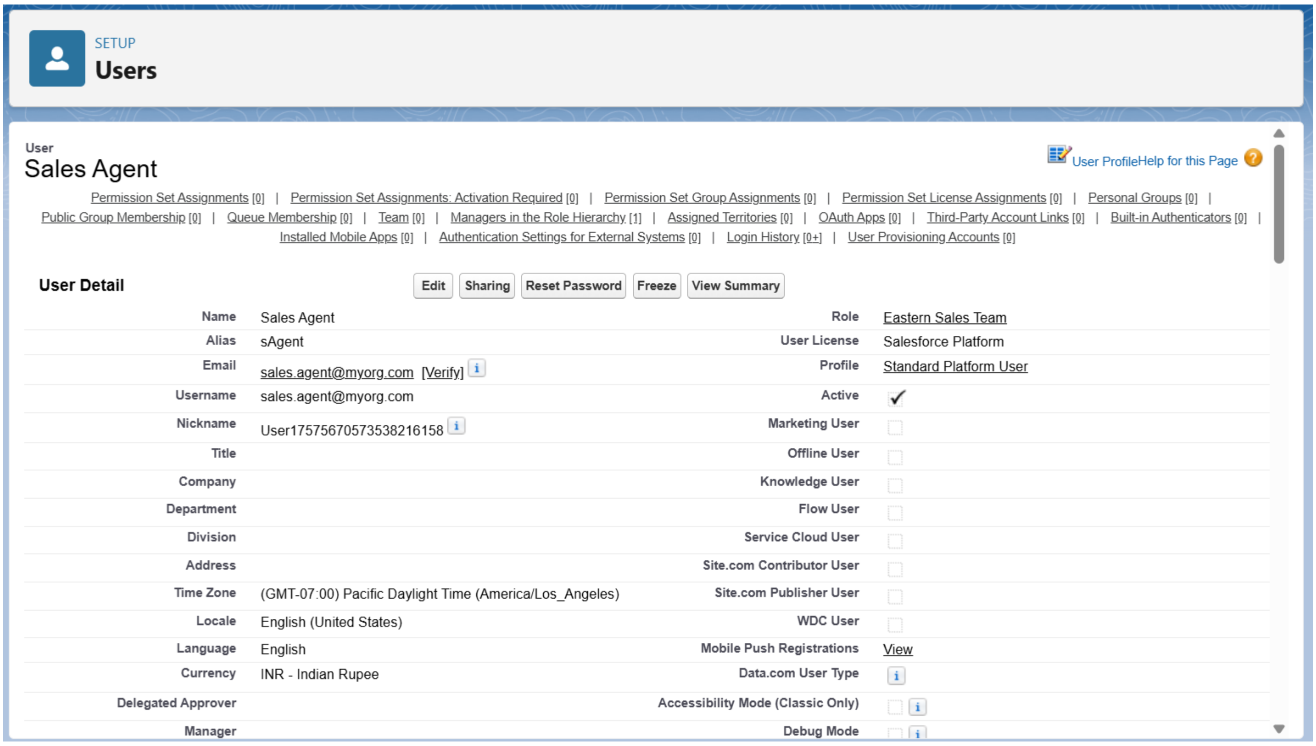
- **Path:** *Setup → Fiscal Year.*
- **Type:** Standard Fiscal Year (Jan–Dec)
- **Configuration:** Starting month set to *January*.
- **Save:** Applied settings to define fiscal periods.



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

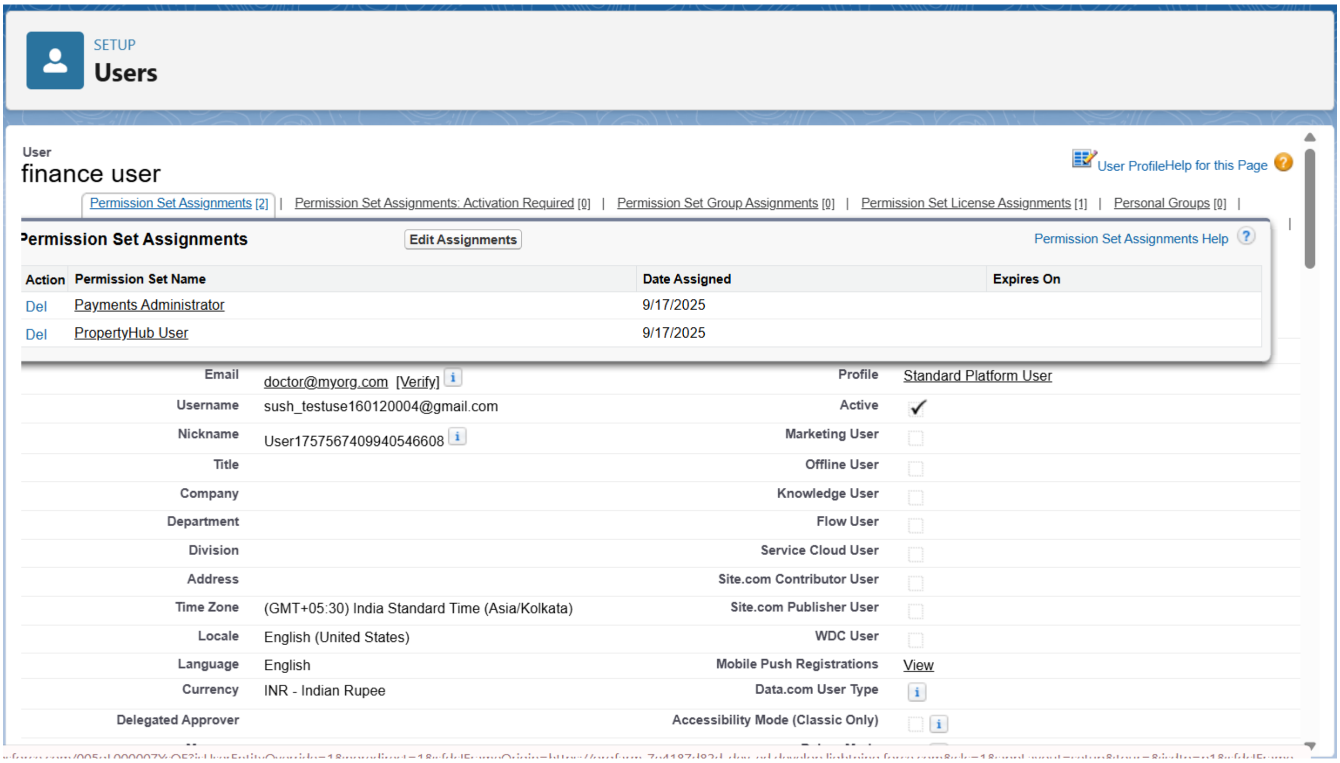
- **Profiles:** Cloned standard profiles to create custom ones for baseline access.
  - *PropertyHub_Agent, PropertyHub_Manager, PropertyHub_Finance* (to be tuned later with object permissions).
- **Roles:** Defined role hierarchy for access and reporting.
  - *CEO, Property Manager, Sales Agent, Finance 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





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



OWD (Org Wide Default)

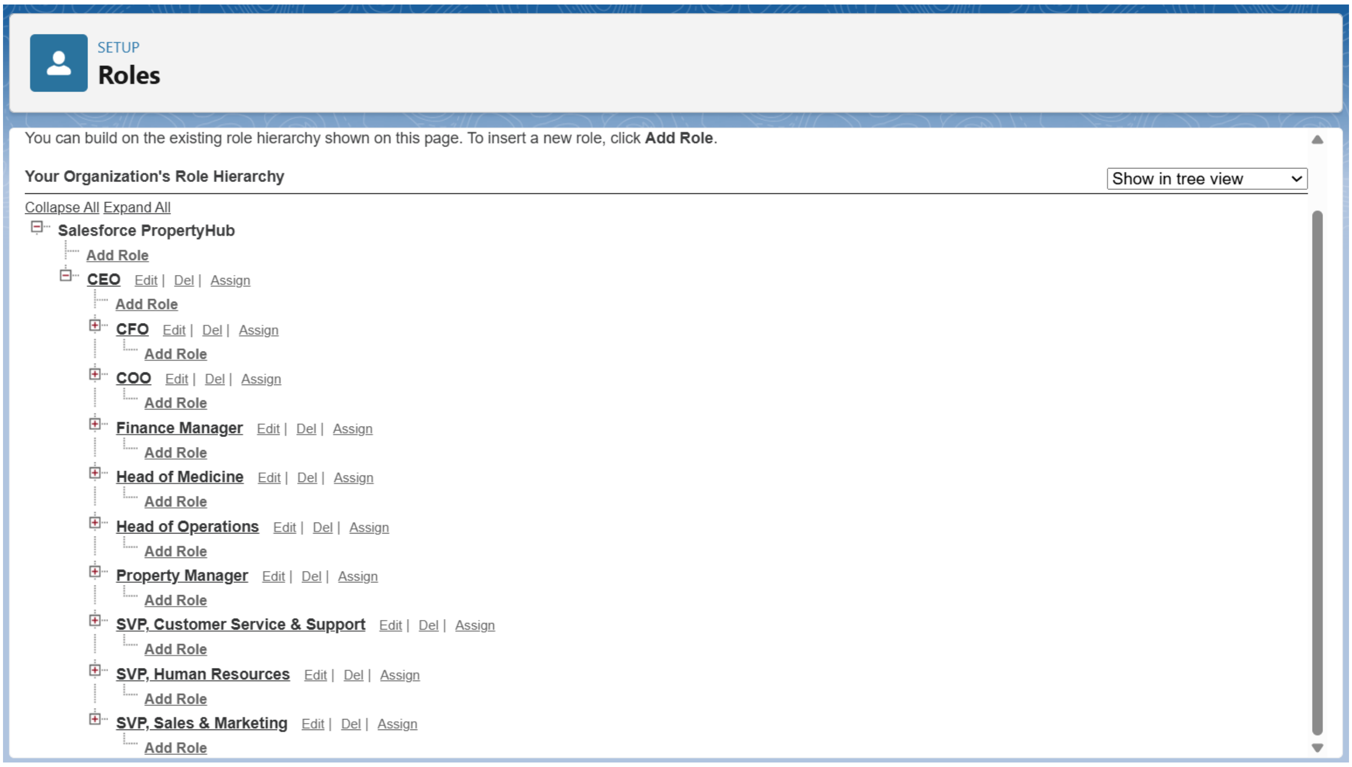
This has to be done in Phase 3, as the OWD settings are needed to be applied on custom objects which will be implemented in the next phase of the project.

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.



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)