

Phase 2: Org Setup & Foundational Configuration

In this phase, the Salesforce environment is prepared for the Smart Property Portal project. The goal is to set up the organization with the correct structure, access, and basic configurations before moving to advanced development.

1. Company Setup

■ Guide: Go to Setup → Company Information. • Name: Smart Property Portal • Time Zone: Asia/Kolkata • Currency: INR (■) • Fiscal Year: Standard ■ Keeps financial and property data aligned.

The screenshot shows the Salesforce Setup interface for Company Information. The left sidebar contains a navigation menu with options like Company Settings, Business Hours, Calendar Settings, Public Calendars and Resources, Company Information (selected), Data Protection and Privacy, Fiscal Year, Holidays, Language Settings, and My Domain. The main content area displays the 'Company Information' page for 'Pragati College'. It includes fields for 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, and Locale Formats. The 'Organization Detail' section shows the organization's profile, including the name 'Pragati College', primary contact 'Lavanya Turaka', and various system settings like default locale, language, time zone, currency, and data space. The 'User Licenses' section at the bottom shows a table with columns for Name, Status, Total Licenses, Used Licenses, Remaining Licenses, and Expiration Date. The table currently shows one user license for 'Salesforce' with a status of 'Active'.

| Name | Status | Total Licenses | Used Licenses | Remaining Licenses | Expiration Date |
|------------|--------|----------------|---------------|--------------------|-----------------|
| Salesforce | Active | 1 | 1 | 0 | |

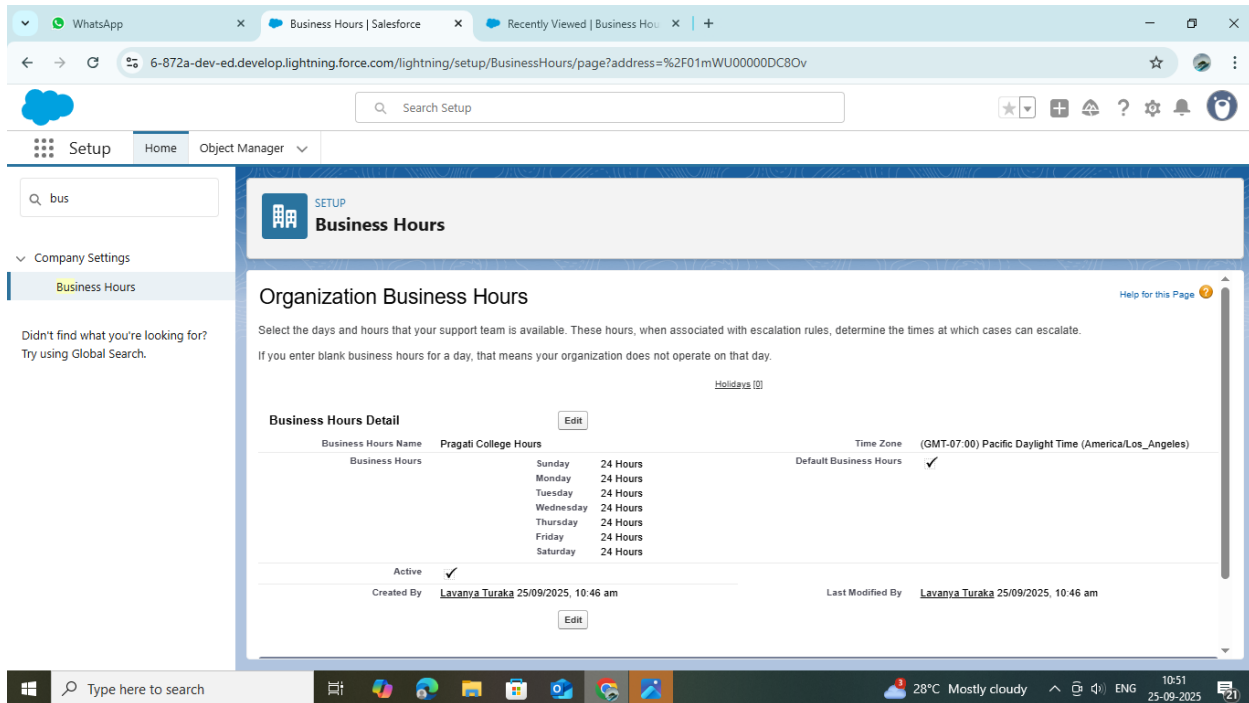
2. Business Hours & Holidays

Make a pragati college hours as org name

Configured working hours

Active the hours

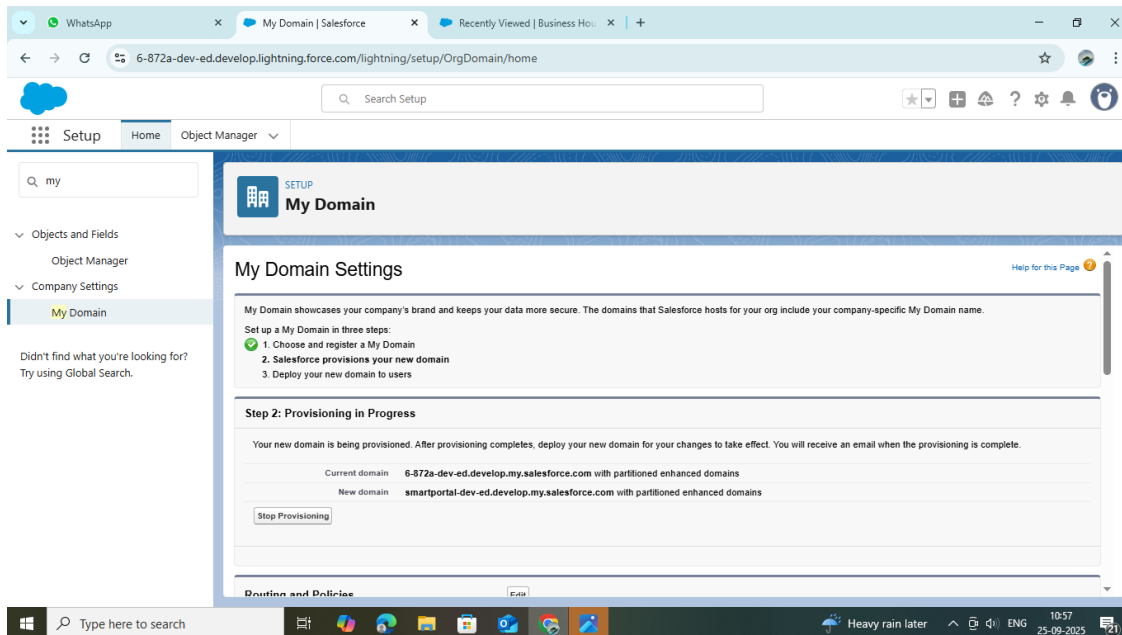
Save



The screenshot shows the Salesforce Setup interface for Business Hours. The left sidebar contains a search bar with 'bus' and a navigation menu with 'Company Settings' and 'Business Hours'. The main content area is titled 'Organization Business Hours' and includes a description: 'Select the days and hours that your support team is available. These hours, when associated with escalation rules, determine the times at which cases can escalate. If you enter blank business hours for a day, that means your organization does not operate on that day.' Below this is a 'Business Hours Detail' section for 'Pragati College Hours'. It shows a table of business hours for each day of the week, all set to '24 Hours'. The 'Time Zone' is '(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)'. The 'Active' checkbox is checked. The 'Created By' and 'Last Modified By' fields both show 'Lavanya Turaka' with timestamps from 25/09/2025. The Windows taskbar at the bottom shows the date as 25-09-2025 and the time as 10:51.

3. My Domain & Lightning

■ Guide: Setup → My Domain → Register e.g., smartproperty-dev-ed.my.salesforce.com.
Deploy domain → Required for Lightning Web Components in repo.

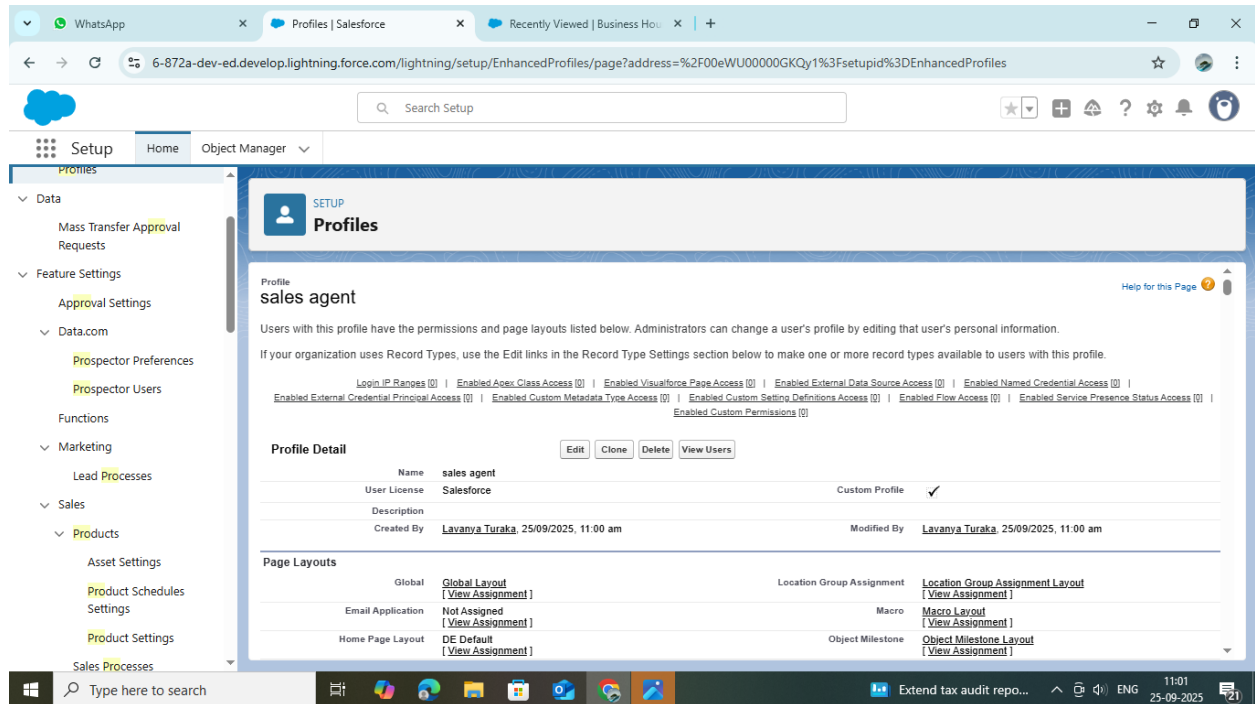


The screenshot shows the Salesforce Setup interface for My Domain. The left sidebar contains a search bar with 'my' and a navigation menu with 'Objects and Fields', 'Object Manager', 'Company Settings', and 'My Domain'. The main content area is titled 'My Domain Settings' and includes a description: 'My Domain showcases your company's brand and keeps your data more secure. The domains that Salesforce hosts for your org include your company-specific My Domain name. Set up a My Domain in three steps: 1. Choose and register a My Domain, 2. Salesforce provisions your new domain, 3. Deploy your new domain to users.' Below this is a 'Step 2: Provisioning in Progress' section. It states: 'Your new domain is being provisioned. After provisioning completes, deploy your new domain for your changes to take effect. You will receive an email when the provisioning is complete.' It shows a table with 'Current domain' as '6-872a-dev-ed.develop.my.salesforce.com with partitioned enhanced domains' and 'New domain' as 'smartportal-dev-ed.develop.my.salesforce.com with partitioned enhanced domains'. A 'Stop Provisioning' button is visible. The Windows taskbar at the bottom shows the date as 25-09-2025 and the time as 10:57.

4. Roles & Profiles

Designed a role hierarchy: CEO → Sales Manager → Sales Agent.

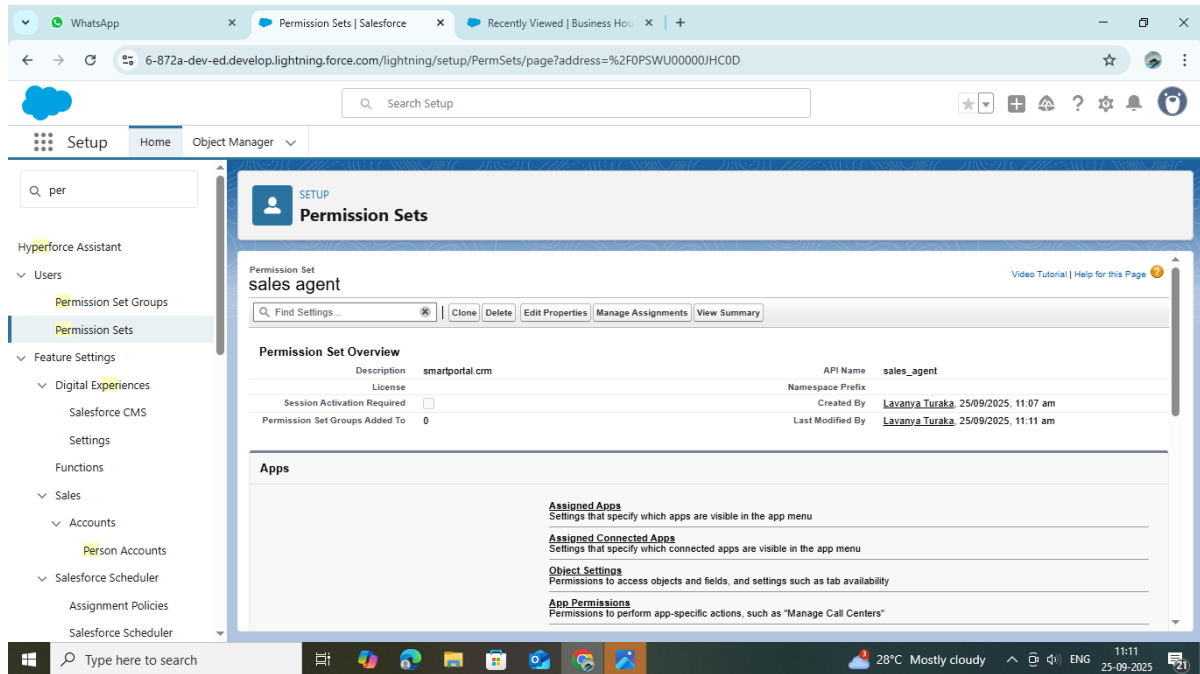
Created custom profiles with necessary permissions for different users.



5. Permission Sets

Defined additional access using permission sets

Ensured managers can manage all records, while agents have limited access.

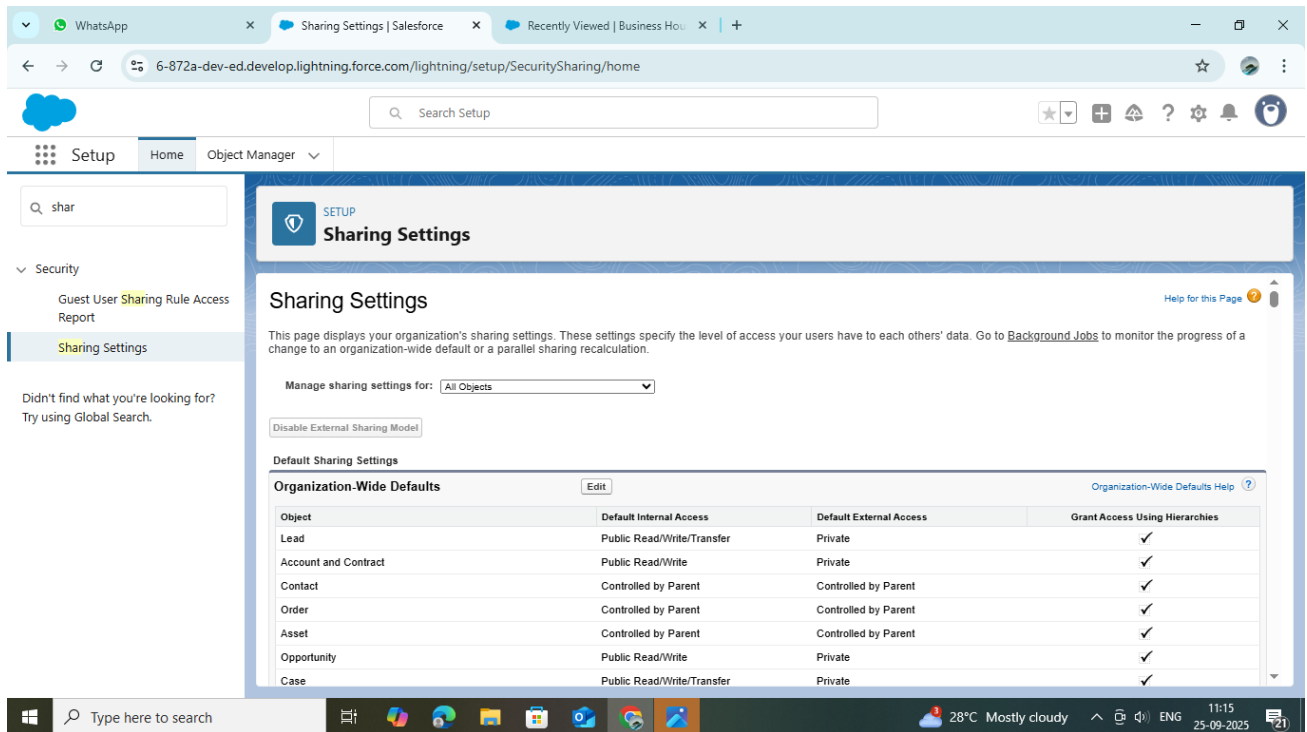


The screenshot shows the Salesforce Setup interface for the 'Permission Sets' section. The left sidebar contains a navigation menu with options like 'Users', 'Permission Set Groups', 'Permission Sets', 'Feature Settings', 'Digital Experiences', 'Salesforce CMS', 'Settings', 'Functions', 'Sales', 'Accounts', 'Person Accounts', 'Salesforce Scheduler', and 'Assignment Policies'. The main content area is titled 'Permission Set sales agent' and includes a search bar, 'Find Settings...', and buttons for 'Clone', 'Delete', 'Edit Properties', 'Manage Assignments', and 'View Summary'. Below this is the 'Permission Set Overview' section, which displays details for the 'sales_agent' permission set, including its description 'smartportal.com', API Name 'sales_agent', Namespace Prefix, Session Activation Required (unchecked), and Permission Set Groups Added To (0). It also shows the Created By (Lavanya Turaka) and Last Modified By (Lavanya Turaka) information. The 'Apps' section is visible below the overview, with links to 'Assigned Apps', 'Assigned Connected Apps', 'Object Settings', and 'App Permissions'.

6. Sharing & Security

Set object-level security to Private

Applied sharing rules to give visibility to team members based on region.



The screenshot shows the Salesforce Setup interface for the 'Sharing Settings' section. The left sidebar contains a navigation menu with options like 'Security', 'Guest User Sharing Rule Access Report', and 'Sharing Settings'. The main content area is titled 'Sharing Settings' and includes a search bar, 'Search Setup', and buttons for 'Help for this Page' and 'Organization-Wide Defaults Help'. Below this is the 'Sharing Settings' section, which displays the 'Default Sharing Settings' for the organization. It includes a 'Manage sharing settings for:' dropdown set to 'All Objects' and a 'Disable External Sharing Model' button. The 'Default Sharing Settings' section is divided into 'Organization-Wide Defaults' and 'Grant Access Using Hierarchies'. The 'Organization-Wide Defaults' table lists various objects and their default internal and external access levels.

| Object | Default Internal Access | Default External Access | Grant Access Using Hierarchies |
|----------------------|----------------------------|-------------------------|--------------------------------|
| Lead | Public Read/Write/Transfer | Private | ✓ |
| Account and Contract | Public Read/Write | Private | ✓ |
| Contact | Controlled by Parent | Controlled by Parent | ✓ |
| Order | Controlled by Parent | Controlled by Parent | ✓ |
| Asset | Controlled by Parent | Controlled by Parent | ✓ |
| Opportunity | Public Read/Write | Private | ✓ |
| Case | Public Read/Write/Transfer | Private | ✓ |

7. Initial Deployment of Objects

Deployed basic objects like Property and Visit into the org.

Verified that page layouts and tabs are visible to the right profiles.

And assigned ametadata type