

Salesforce Property **Management App**

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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:** Property Management Solutions
- **Time Zone:** (GMT-07:00) Pacific Daylight Time (America/Los_Angeles)
- **Locale:** English (US)
- **Language:** English
- **Currency:** English (United States) - USD

The screenshot shows the 'Company Information' setup page in Salesforce. The organization name is 'Property Management Solutions'. Below the name, there are links for 'User Licenses (10)', 'Permission Set Licenses (10)', 'Feature Licenses (11)', and 'Usage-based Entitlements (10)'. The 'Organization Detail' section is expanded, showing various settings. The 'Edit' button is visible. The settings are organized into two columns.

Organization Detail	
Organization Name	Property Management Solutions
Primary Contact	OrgFarm EPIC
Division	
Address	United States
Fiscal Year Starts In	January
Activate Multiple Currencies	<input type="checkbox"/>
Enable Data Translation	<input type="checkbox"/>
Newsletter	<input checked="" type="checkbox"/>
Admin Newsletter	<input checked="" type="checkbox"/>
Hide Notices About System Maintenance	<input type="checkbox"/>
Hide Notices About System Downtime	<input type="checkbox"/>
Locale Formats	ICU
Phone	
Fax	
Default Locale	English (United States)
Default Language	English
Default Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)
Currency Locale	English (United States) - USD
Used Data Space	342 KB (7%) [View]
Used File Space	17 KB (0%) [View]
API Requests, Last 24 Hours	0 (15,000 max)
Streaming API Events, Last 24 Hours	0 (10,000 max)
Restricted Logins, Current Month	0 (0 max)
Salesforce.com Organization ID	00DgL00000B0e1D
Organization Edition	Developer Edition
Instance	CAN98

Business Hours Setup

Configure working hours for escalation rules and SLA tracking:

- **Path:** *Setup* → *Business Hours* → *New*.
- **Name:** Standard Property Management Solutions Business Hours

SETUP

Business Hours

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.

Holidays [0]

Business Hours Detail

Edit

Business Hours Name	Property Management Standard Hours		Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)
Business Hours	Sunday	No Hours	Default Business Hours	<input checked="" type="checkbox"/>
	Monday	8:00 AM to 6:00 PM		
	Tuesday	8:00 AM to 6:00 PM		
	Wednesday	8:00 AM to 6:00 PM		
	Thursday	8:00 AM to 6:00 PM		
	Friday	8:00 AM to 6:00 PM		
	Saturday	8:00 AM to 6:00 PM		

Active

☒

Created By

Mathand Bhargav Jalasutram

9/17/2025, 2:55 AM

Last Modified By

Mathand Bhargav Jalasutram

9/24/2025, 12:44 AM

Edit

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*.

Setup

Organization Fiscal Year Edit: Property Management Solutions

Help for this Page

To specify the fiscal year type for your organization, choose one of the options below.

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.

Standard Fiscal Year

Custom Fiscal Year

Change Fiscal Year Period

Name

Property Management Solutions

Fiscal Year Start Month

January

Fiscal Year is Based On

The ending month

The starting month

Save

Cancel

4. User Management Architecture

Create Roles Step by Step:

1. CEO Role:

- Click "Add Role"
- Role Name: CEO
- This role reports to: --None--
- Contact & Opportunity Access: Controlled by Parent
- Case Access: Controlled by Parent

2. *Regional Manager:*

- *Role Name: Regional Manager*
- *This role reports to: CEO*
- *Contact & Opportunity Access: Controlled by Parent*

3. *Property Manager:*

- *Role Name: Property Manager*
- *This role reports to: Regional Manager*
- *Contact & Opportunity Access: Controlled by Parent*

4. *Maintenance Supervisor:*

- *Role Name: Maintenance Supervisor*
- *This role reports to: Regional Manager*

5. *Maintenance Staff:*

- *Role Name: Maintenance Staff*
- *This role reports to: Maintenance Supervisor*

6. *Finance Manager:*

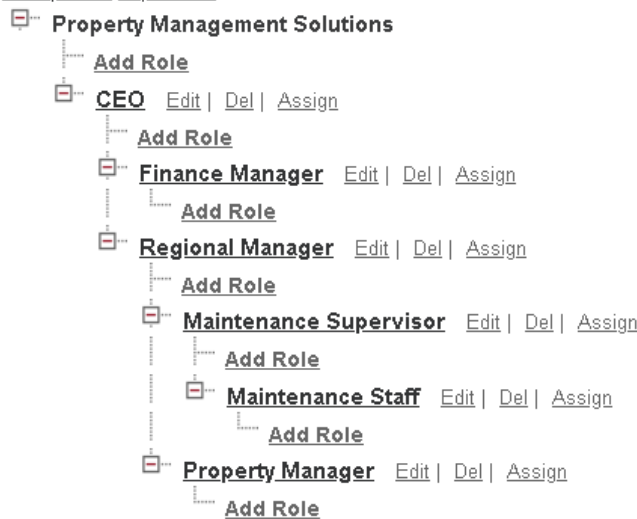
- *Role Name: Finance Manager*
- *This role reports to: CEO*

Creating the Role Hierarchy

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

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



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.

Permission Sets.

- Create Specialized Permission Sets

Path: Setup → Users → Permission Sets

Property Analytics Permission Set:

1. Click "New"
2. Label: Property Analytics Access
3. API Name: Property_Analytics_Access
4. Description: Advanced reporting and dashboard access for property analytics
5. License: Salesforce
6. Save

Configure Permissions:

1. App Permissions:
 - Analytics Cloud: ✓ (if available)
 - Reports and Dashboards: ✓
2. System Permissions:
 - Create and Customize Reports: ✓
 - Create and Customize Dashboards: ✓
 - Manage Dynamic Dashboards: ✓
 - Run Reports: ✓

Emergency Maintenance Permission Set:

1. Label: Emergency Maintenance Access
2. API Name: Emergency_Maintenance_Access
3. Description: After-hours access for emergency maintenance
4. System Permissions:
 - View Setup and Configuration: ✓
 - Manage Maintenance Requests: Custom permission (to be created)

B. Assign Permission Sets

Path: Setup → Users → Users → [Select User] → Permission Set Assignments

1. Select "Property Manager" user

2. Click "Edit Assignments"
3. Add "Property Analytics Access"
4. Save

Step 9: Organization-Wide Defaults (OWD)

A. Configure Sharing Settings

Path: Setup → Security → Sharing Settings

Set OWD for Custom Objects:

Property__c:

- Default Internal Access: Public Read/Write
- Default External Access: Private (if communities enabled)
- Grant Access Using Hierarchies: ✓

Tenant__c:

- Default Internal Access: Private
- Default External Access: Private
- Grant Access Using Hierarchies: ✓
- Reason: Sensitive PII information

Lease__c:

- Default Internal Access: Public Read Only
- Default External Access: Private
- Grant Access Using Hierarchies: ✓

Payment__c:

- Default Internal Access: Private
- Default External Access: Private
- Grant Access Using Hierarchies: ✓
- Reason: Financial information

Maintenance_Request__c:

- Default Internal Access: Public Read/Write
- Default External Access: Private

- Grant Access Using Hierarchies: ✓

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