

Phase 2: Org Setup & Configuration

Project Title: Smart Property Portal – Real Estate Customer Engagement & Lead Conversion

Goal: Configure Salesforce Org to support real estate workflows such as property listings, customer interactions, lead nurturing, and deal conversion.

1. Salesforce Edition Selection

Use Salesforce Developer Edition for practice or Enterprise Edition in a real-world implementation.

Ensure Sales Cloud + Experience Cloud are enabled (for property portal access).

2. Company Profile Setup

Go to Setup → Company Settings → Company Information.

Add company name: Smart Property Pvt. Ltd.

Set time zone, locale, and default currency (e.g., INR for Indian market).

Enable multi-currency if properties are sold internationally.

3. Business Hours & Holidays

Define working hours for agents (e.g., 9:00 AM – 8:00 PM).

Add regional holidays to avoid automated reminders/approvals during off-days.

4. Fiscal Year Settings

Standard fiscal year (Jan–Dec).

Optionally, set custom fiscal year (Apr–Mar) for real estate market alignment in India.

5. User Setup & Licenses

Create main user types:

Property Agent → Manages leads & customer follow-ups.

Sales Manager → Monitors performance, approves deals.

Marketing Team → Runs campaigns, manages engagement.

Administrator → Manages Salesforce setup.

Assign Salesforce Sales Cloud licenses.

Give Marketing Team Marketing User checkbox for Campaigns.

6. Profiles

Property Agent Profile → Create/Edit Leads, View Properties, Limited access to Opportunities.

Sales Manager Profile → Full access to Leads, Opportunities, Approvals.

Marketing Profile → Access to Campaigns, Reports, Dashboards.

Admin Profile → Full System Access.

7. Role Hierarchy

CEO / Director (Top)

↳ Sales Manager

↳ Property Agents (under respective managers)

This ensures managers can see all deals/leads of their team, while agents see only their own.

8. Permission Sets

Create permission sets for special access without altering profiles:

Report Access for agents needing analytics.

Portal Access for marketing team to configure Experience Cloud portal.

9. Org-Wide Defaults (OWD)

Leads: Public Read/Write (to enable collaboration).

Opportunities (Deals): Private (restricted to owner & manager).

Properties (Custom Object): Public Read Only (all agents can view listings).

Customers (Contacts): Private (only assigned agent/manager can view).

10. Sharing Rules

Define branch-wise rules: Leads & Opportunities can be shared within the same branch team.

Share property records across all sales agents.

11. Login Access Policies

Restrict agent logins to working hours.

Enforce IP restrictions so logins are allowed only from office network.

12. Developer Org / Sandbox Setup

Build Smart Property Portal in Sandbox/Dev Org to test configurations safely.

13. Sandbox Usage

Test Lead → Property Interest → Opportunity → Deal flow.

Run test campaigns for engagement automation.

14. Deployment Basics

Use Change Sets to move configuration from Sandbox → Production.

Maintain deployment checklist (profiles, roles, workflows, approval processes).

✓ Outcome of Phase 2:

Your Salesforce Org is fully structured to support real estate property listings, lead engagement, and conversion processes with clear access controls, role hierarchy, and collaboration rules.