# 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.