Phase 2

Salesforce Edition

- **Development Environment:**

1. The project is being built within a **free Salesforce Developer Edition**.
2. This edition is selected because it provides access to **Enterprise Edition features** (such as Flows, Custom Objects, and Apex) but with restricted capacity (limited users, storage).

- **Target Production Environments (for Launch):**

1. A commercial edition, typically **Enterprise** or **Unlimited**, would be required to scale the "RentEase" application for live business use.
2. These editions offer the necessary **high user limits, robust API access**, and **larger data storage** capacity for a full-scale property management solution.

- **Key Takeaway:** The current environment is solely for **building and testing** the feature set.

Company Profile Setup Details

- **Organizational Identity:**
  - The formal **Organization Name** has been set to **RentEase**.
  - The official headquarters address Jabalpur and contact information is email siddhes99@gmail.com and phone is 8305218612.

  Time & Location Standards:

  - The **Indian Locale** is configured to establish correct formatting standards for dates, times, and currency.
  - The **Indian Ruppee Currency** is set based on the organization's financial region.

  Financial & Service Defaults:

  - The project uses a **Standard Fiscal Year** with a defined start month (e.g., January) to ensure accurate financial reporting consistency.
  - Specific **Business Hours** are now defined and will be used as a baseline for measuring response and resolution times for maintenance service processes.

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Company Profile Setup Implementation

- **1. Access Company Information:**
  - **Step:** Click the **gear icon** and navigate to **Setup**.
  - **Step:** Use Quick Find to search for and select `Company Information`.

  2. Update Organization Details:

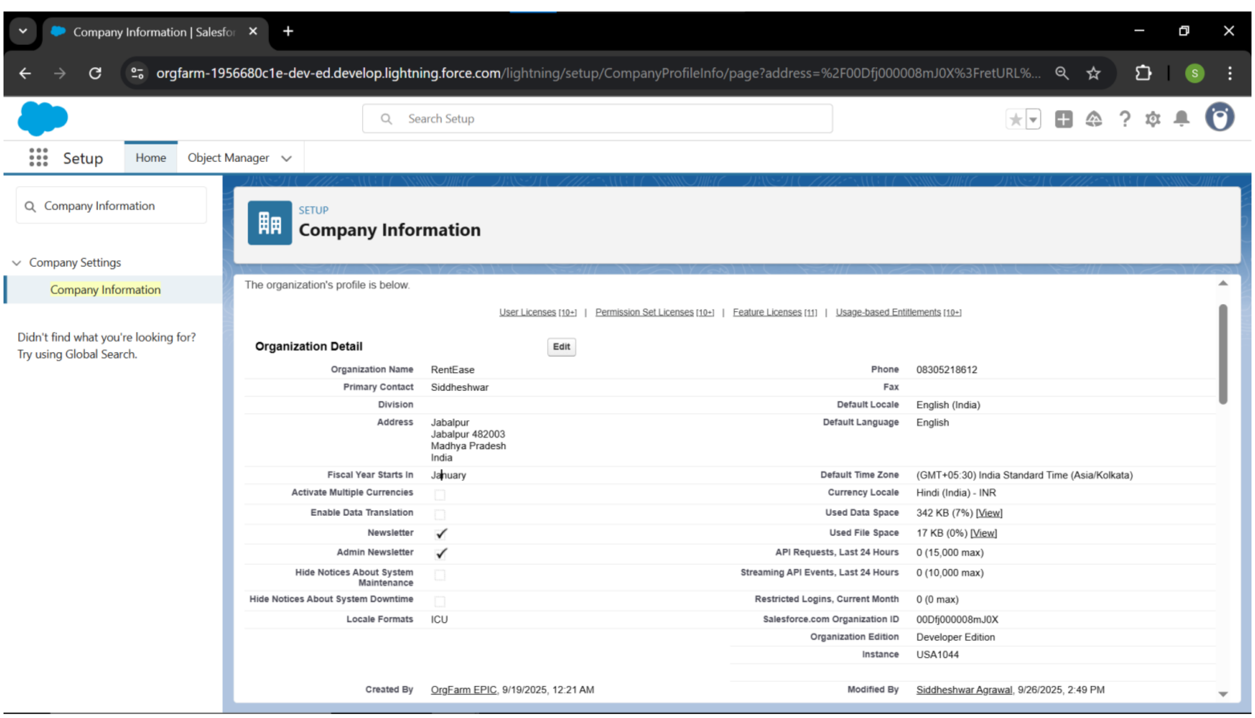
  - **Step:** Click the **Edit** button on the Company Information page.
  - **Step:** Update the **Organization Name** to **RentEase**.
  - **Step:** Fill in the primary **Address**, **Phone**, and verify .

  3. Set Fiscal Year:

  - **Step:** Navigate to the **Fiscal Year** settings from the Company Information page.
  - **Step:** Select **Standard Fiscal Year**.
  - **Step:** Choose the specific **month** your company's financial year.

  4. Define Business Hours:

  - **Step:** Use Quick Find to search for and select `Business Hours`.
  - **Step:** Click **New** or **Edit** the existing default entry.
  - **Step:** Define the standard work week hours.



Business Hours & Holidays.

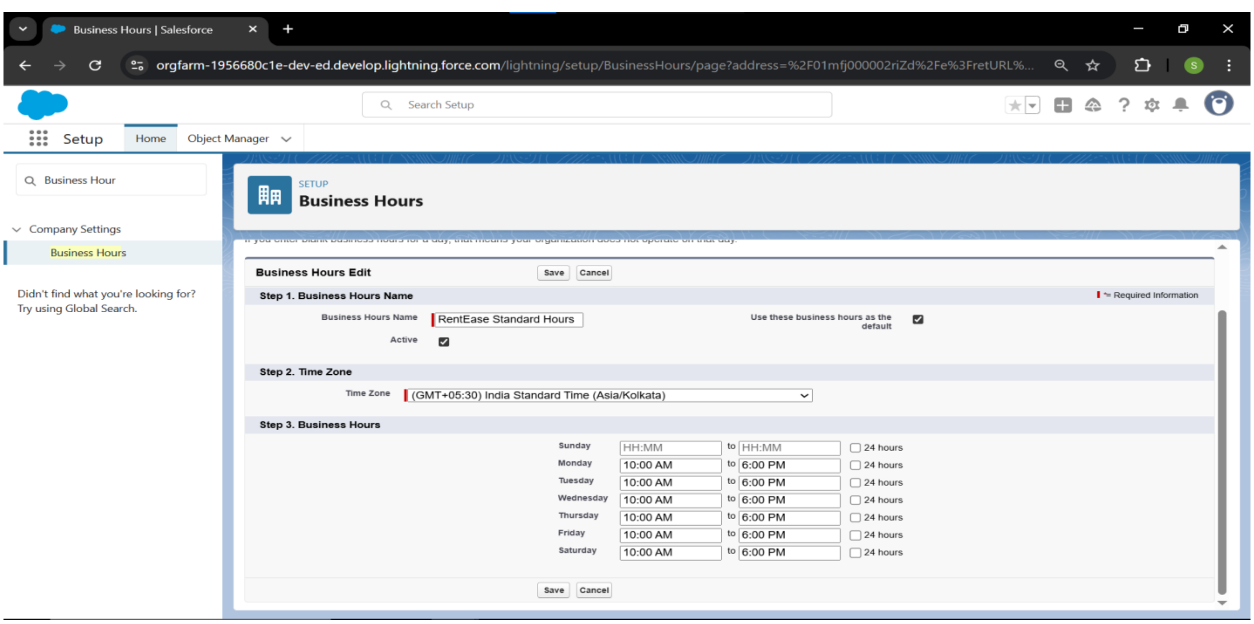
- **Business Hours Definition:**
  1. A dedicated **Business Hours record** (`RentEase Standard Hours`) has been created to define the active working schedule (Monday to Friday, 10:00 AM - 6:00 PM).
  2. This definition ensures that time-based automation only counts time when staff are available.
- **Holidays Integration:**
  1. All relevant company holidays have been entered into the system.
  2. The system is configured so that time-based calculations (e.g., tracking how long a maintenance request has been open) automatically **pause** during these specified holidays.

- **1. Access Business Hours:**

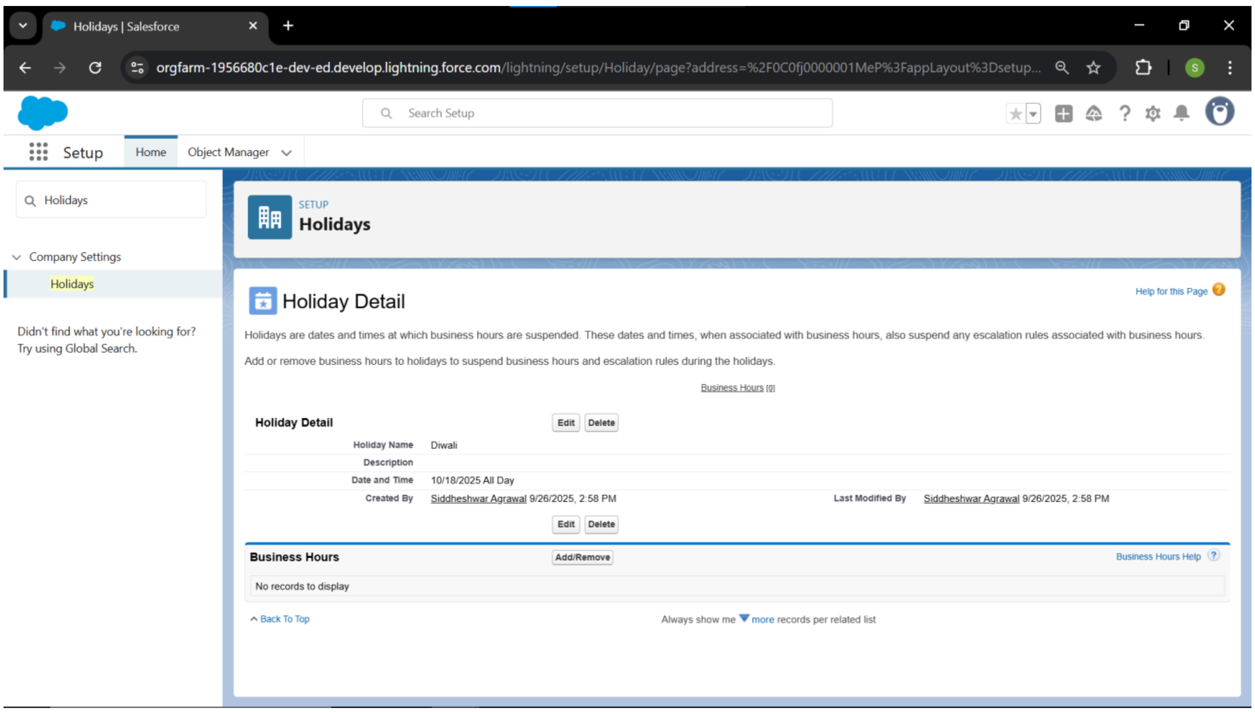
  - **Step:** Click the **gear icon** and navigate to **Setup**.
  - **Step:** Use Quick Find to search for and select `Business Hours`.

- **2. Define Standard Business Schedule:**

  - **Step:** Click **New** or **Edit** the existing **Default** entry.
  - **Step:** Set the **Label** (`RentEase Standard Hours`).
  - **Step:** Define the days and specific **Start and End Times** for your property management office (e.g., Monday through Friday, 10:00 AM - 6:00 PM).
  - **Step:** Ensure the correct **Time Zone** is selected.
  - **Step:** Click **Save**.



- **3. Access Holidays:**
  - **Step:** Use Quick Find to search for and select `Holidays`.
- **4. Enter Company Holidays:**
  - **Step:** Click **New**.
  - **Step:** Enter the **Name** of the holiday .
  - **Step:** Select the specific **Date** of the holiday.
  - **Step:** Mark if the holiday is **Recurring**
  - **Step:** Click **Save**.
  - **Step: Repeat** this process to enter all necessary annual company holidays.



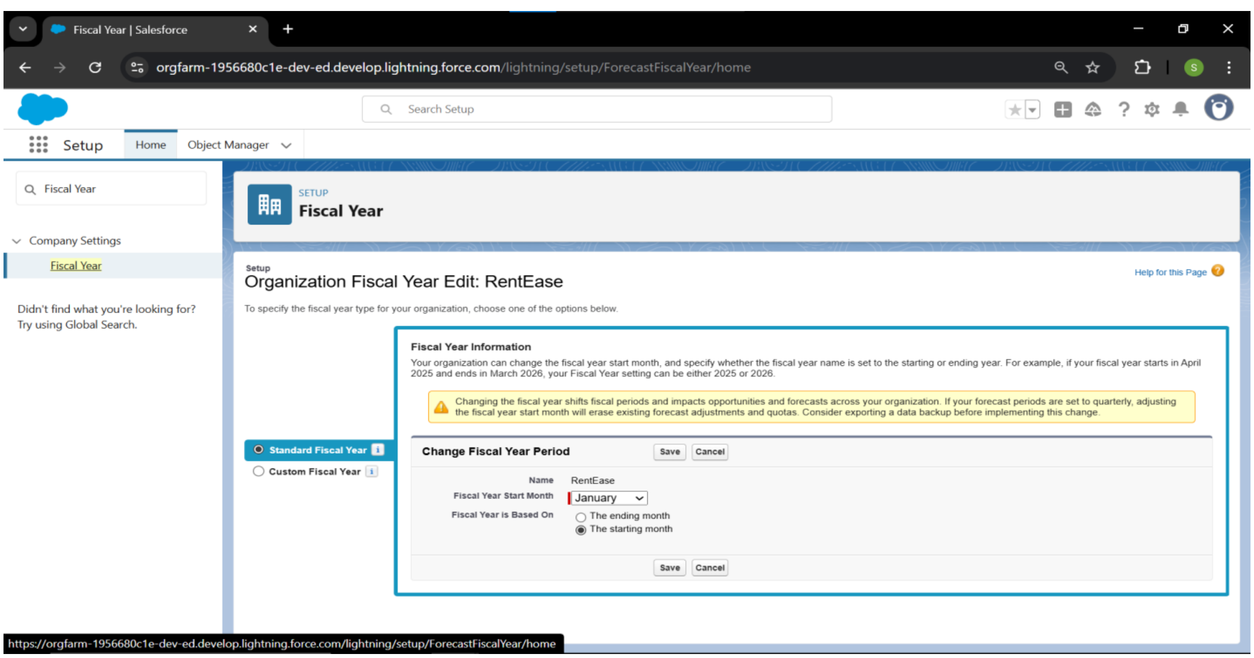
Fiscal Year Settings:

- **Primary Objective:** To define the annual financial reporting cycle within Salesforce to ensure alignment with the Finance Team's accounting standards.
- **Fiscal Year Type:**
    1. The system is configured to use a **Standard Fiscal Year**.
    2. This choice maintains a straightforward 12-month accounting period.
- **Start Month Defined:**

    1. The fiscal year is defined to begin on the first day of **[Insert Month Here January]**.
    2. This setting will govern the grouping and labeling of financial data in all reports and dashboards

Fiscal Year Settings:

- **1. Access Fiscal Year Settings:**
    - **Step:** Click the **gear icon** and navigate to **Setup**.
    - **Step:** Use Quick Find to search for and select `Fiscal Year`.
- **2. Choose Fiscal Year Type:**
    - **Step:** Confirm that **Standard Fiscal Year** is selected.
- **3. Define Start Month:**
    - **Step:** Select the specific **Start Month** for your company's fiscal year (choose January).
    - **Step:** Select the **Yearly Period** (12 Months).
    - **Step:** Click **Save**.



User Setup & Licenses:

- **Primary Objective:** To provision all necessary internal staff accounts and establish the mandatory link between the user, their specific **Profile**, and their position in the **Role Hierarchy**.
- **Internal User Allocation:**
    1. Four primary internal user accounts were provisioned: Admin/CEO, Property Manager, Finance Team, and Maintenance Staff.
    2. Each user is assigned to their corresponding custom Profile and a specific Role within the `RentEase` hierarchy.
- **License Management:**

    1. The **Salesforce User License** was allocated to primary administrators.
    2. The **Salesforce Platform License** was utilized for specialized staff (Finance/Maintenance) to optimize license usage.
- **Tenant User Note:**

    1. External tenant accounts were **not** created in this step.
    2. Tenant users will be provisioned later as **Experience Cloud Users**.

User Setup & Licenses:

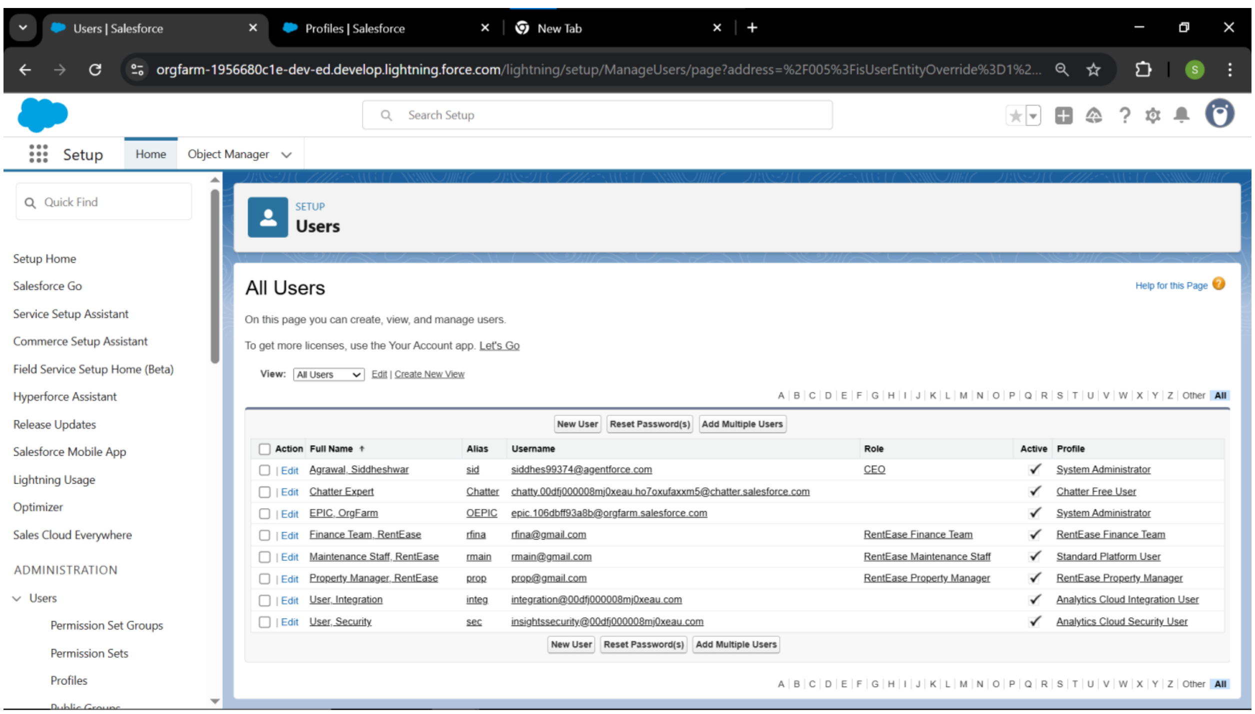
- **1. Access User Management:**
    - **Step:** Click the **gear icon** □ and navigate to **Setup**.
    - **Step:** Use Quick Find to search for and select `Users`, then click **Users**.

- **2. Create Admin/CEO User:**
    - **Step:** Click the **New User** button.
    - **Step:** Fill in a valid **Name** and a unique **Username** (e.g., `manager.rentease@example.com`).
    - **Step:** Set **User License** to **Salesforce**.
    - **Step:** Set **Profile** to **System Administrator** (or the Profile that has been designated as your initial highest admin).
    - **Step:** Set **Role** to **RentEase CEO**.
    - **Step:** Click **Save**.

- **3. Create Property Manager User:**
    - **Step:** Click **New User**.
    - **Step:** Set **User License** to **Salesforce**.
    - **Step:** Set **Profile** to **RentEase Property Manager**.
    - **Step:** Set **Role** to **RentEase Property Manager**.
    - **Step:** Click **Save**.

- **4. Create Finance Team User:**
    - **Step:** Click **New User**.
    - **Step:** Set **User License** to **Salesforce Platform** (or Salesforce if available).
    - **Step:** Set **Profile** to **RentEase Finance Team**.
    - **Step:** Set **Role** to **RentEase Finance Team**.
    - **Step:** Click **Save**.

- **5. Create Maintenance Staff User:**
    - **Step:** Click **New User**.
    - **Step:** Set **User License** to **Salesforce Platform**.
    - **Step:** Set **Profile** to **RentEase Maintenance Staff**.
    - **Step:** Set **Role** to **RentEase Maintenance Staff**.
    - **Step:** Click **Save**.



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Profiles:

- **Total Profiles Created:** Four custom profiles were created to enforce the security model.
- **Profile Types and Licensing:**
  1. The **RentEase Property Manager** profile was cloned from **Standard User**, compatible with the **Salesforce License**.
  2. The **RentEase Finance Team**, **Maintenance Staff**, and **Tenant** profiles were cloned from a Platform license base, compatible with the **Salesforce Platform License** for cost efficiency.
- **Permission Summary (CRUD/Object Level):**

  1. **Manager:** Granted **Full CRUD access** on all custom objects for complete administrative oversight.
  2. **Finance Team:** Granted **Read/Edit** on **Lease** and **Payment** objects for financial reconciliation purposes.
  3. **Maintenance Staff:** Granted **Read/Edit** on **Maintenance Request** only, with Read access to **Property** and **Tenant** for context.
  4. **Tenant:** Granted highly restricted access to only **Read** their own Lease/Payment data and **Create/Read** their own Maintenance Requests.

Profiles: Implementation

1. Create the Manager Profile

- **Step:** Go to **Setup** → `Profiles`. Find the **Standard User** profile.
- **Step:** Click **Clone**.
- **Step:** Name the new profile **RentEase Property Manager**.
- **Step:** Click **Edit** on the new profile.
- **Step:** Scroll to **Custom Object Permissions**.
- **Action:** For **ALL 7 Custom Objects** (`Property`, `Lease`, `Tenant`, `Payment`, `Maintenance Request`, `Staff/User`, `Notification Log`), check all boxes for **Read**, **Create**, **Edit**, and **Delete**.
- **Step:** Click **Save**.

2. Create the Finance Team Profile

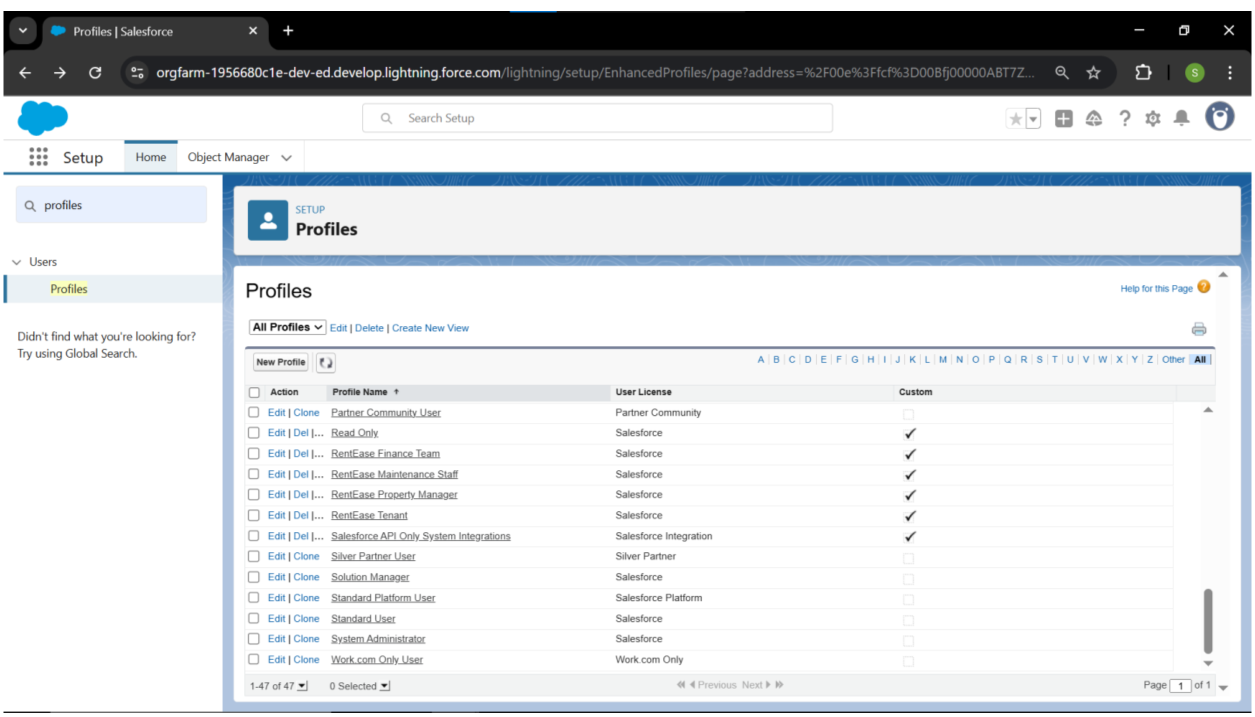
- **Step:** Go back to the Profiles list and find the **Standard Platform User** profile.
- **Step:** Click **Clone** (or clone the existing **RentEase Maintenance Staff** profile).
- **Step:** Name the new profile **RentEase Finance Team**.
- **Step:** Click **Edit** and scroll to **Custom Object Permissions**.
- **Action:** Set permissions for financial oversight:
  - **Lease:** Check **Read** and **Edit**.
  - **Payment:** Check **Read** and **Edit**.
  - **Tenant:** Check **Read** only.
  - **All Other Objects:** Leave as **No Access**.
- **Step:** Click **Save**.

3. Create the Tenant Profile

- **Step:** Clone a **Standard Platform User** profile (or clone your new Finance profile).
- **Step:** Name the new profile **RentEase Tenant**.
- **Step:** Click **Edit** and scroll to **Custom Object Permissions**.
- **Action:** Set permissions for self-service:
  - **Maintenance Request:** Check **Read** and **Create**.
  - **Property:** Check **Read** only.
  - **Lease:** Check **Read** only.
  - **Payment:** Check **Read** only.
  - **All Other Objects:** Leave as **No Access**.
- **Step:** Click **Save**.

4.User Creation and Assignment

- **Step:** Go to **Setup** → `Users` → **New User**.
- **Step:** Fill in the user's name and a unique email/username.
- **Action:** Set the **User License** to **Salesforce Platform** (this is essential for the profile to appear).
- **Action:** Set the **Profile** to **RentEase Maintenance Staff**.
- **Action:** Set the **Role** to **RentEase Maintenance Staff**.
- **Step:** Click **Save**.



Roles:

- **Primary Objective:** To define the organizational structure necessary for the OWD (Private) model, enabling data access through the management chain.
- **Hierarchy Structure:**
    1. A **four-tier hierarchy** was established, starting with **RentEase CEO** at the top.
    2. The **RentEase Property Manager** is the primary operational manager.
    3. **Finance, Maintenance, and Tenant** roles are positioned as subordinates to the Property Manager.
- **Sharing Impact:**

    1. This structure ensures that the **Property Manager** automatically gains **Read Access** to all records owned by users in the Finance, Maintenance, and Tenant roles.
    2. This is a critical component of the security model, as it works in tandem with the **OWD Private** settings.

Roles: Implementation

1. Access Role Management

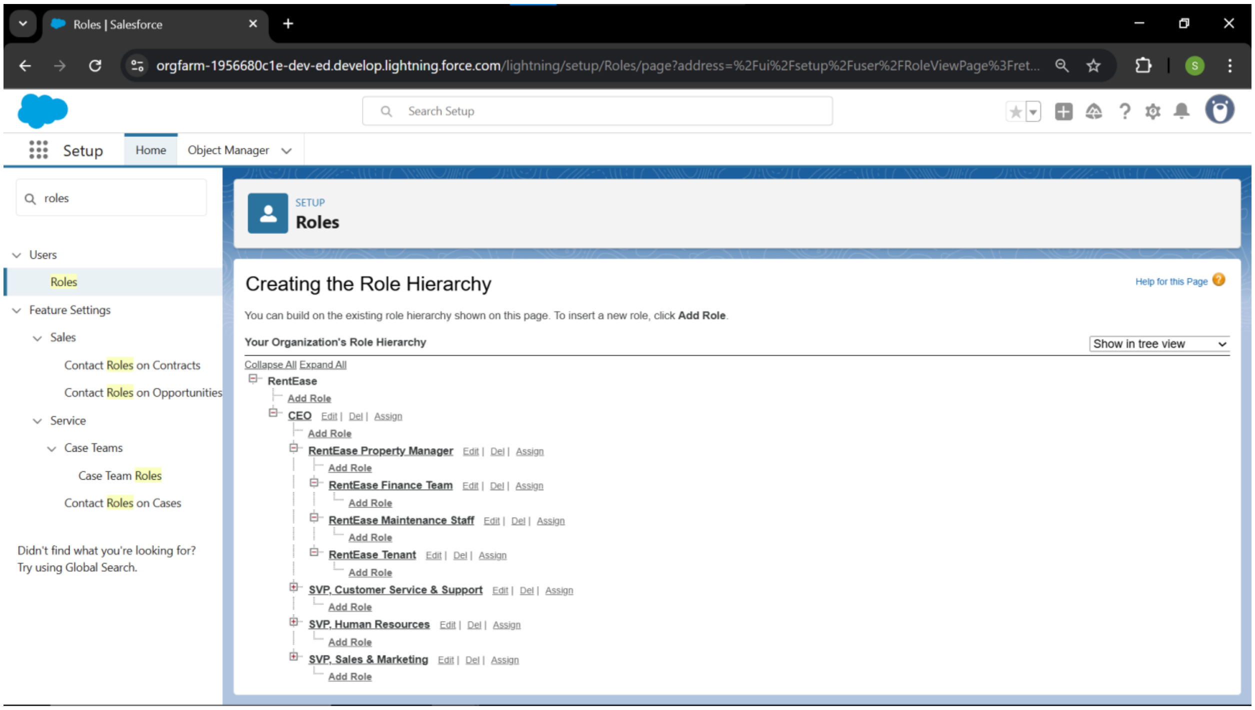
- **Step:** Click the **gear icon** and navigate to **Setup**.
- **Step:** Use Quick Find to search for and select `Roles`.
- **Step:** Click **Set Up Roles** to view the hierarchy tree.

2. Create the Role Hierarchy (Top-Down)

- **Step:** Create the **RentEase CEO** role first. Find the top-most role and click **Add Role** below it. Set **Reports To** as **(Self Report)**.
- **Step:** Find the new **RentEase CEO** role and click **Add Role** below it. Create the **RentEase Property Manager** role, setting **Reports To** as **RentEase CEO**.
- **Step:** Find the **RentEase Property Manager** role and click **Add Role** below it three times to create the subordinate roles:
    1. **RentEase Finance Team** (Reports to Manager)
    2. **RentEase Maintenance Staff** (Reports to Manager)
    3. **RentEase Tenant** (Reports to Manager)

3. Assign Users to Roles

- **Step:** Click the **Assign Users to Roles** button (or navigate to the role you want to assign).
- **Step:** Assign the corresponding user to each role you created (e.g., assign the Property Manager user to the **RentEase Property Manager** role).
- **Step:** Click **Save**.



Permission Sets:

- **Primary Objective:** To grant necessary reporting access that intentionally overrides the strict **OWD Private** security model without altering the base user Profiles.
- **Set Details:**
  1. The **Advanced Reporting** Permission Set was created specifically for management and financial oversight roles.
  2. This set adheres to the principle of granting **additional access** beyond the user's base Profile.
- **Permissions Granted:**
  1. The set grants the crucial **View All** access on both the **Property** and **Lease** custom objects.
  2. This ensures Property Managers and the Finance Team can see **every record** regardless of ownership, which is essential for accurate, system-wide dashboards and reporting.

Permission Sets: Implementation

1. Create the Permission Set

- **Step:** Click the **gear icon** and navigate to **Setup**.
- **Step:** Use Quick Find to search for and select `Permission Sets`.
- **Step:** Click the **New** button.

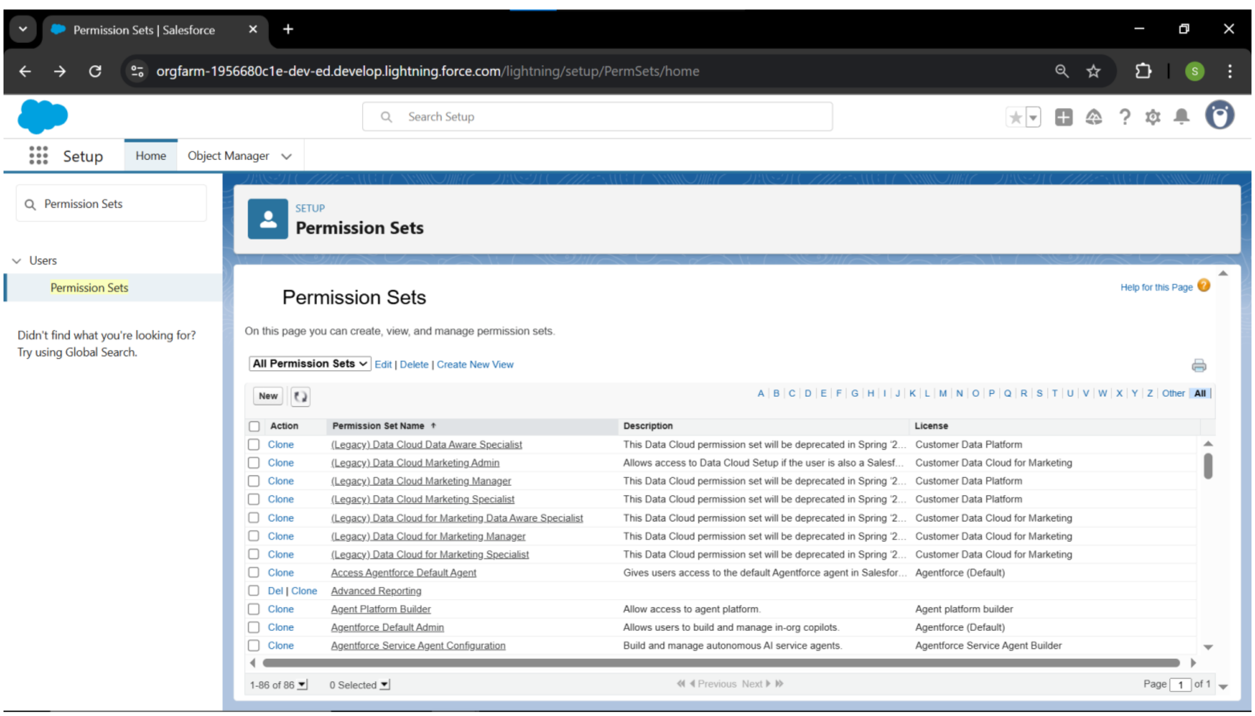
- **Step:** Set the **Label** to **Advanced Reporting**.
- **Step:** Click **Save**.

2. Set Object Permissions

- **Step:** On the new Permission Set detail page, scroll down to the **Apps** section and click on **Object Settings**.
- **Action:** Click on the **Property** object in the list.
- **Action:** Click **Edit**, ensure **Read** is checked, and check the box for **View All** under **Object Permissions**.
- **Step:** Click **Save**.
- **Step:** Return to **Object Settings** and repeat the process for the **Lease** object, granting **View All** permission.

3. Assign Permission Set to Users

- **Step:** From the **Advanced Reporting** detail page, click the **Manage Assignments** button.
- **Step:** Click **Add Assignments**.
- **Action:** Select the actual user records for the **RentEase Property Manager** and the **RentEase Finance Team** (the users you created in the User Setup step).
- **Step:** Click **Assign**, then **Done**.

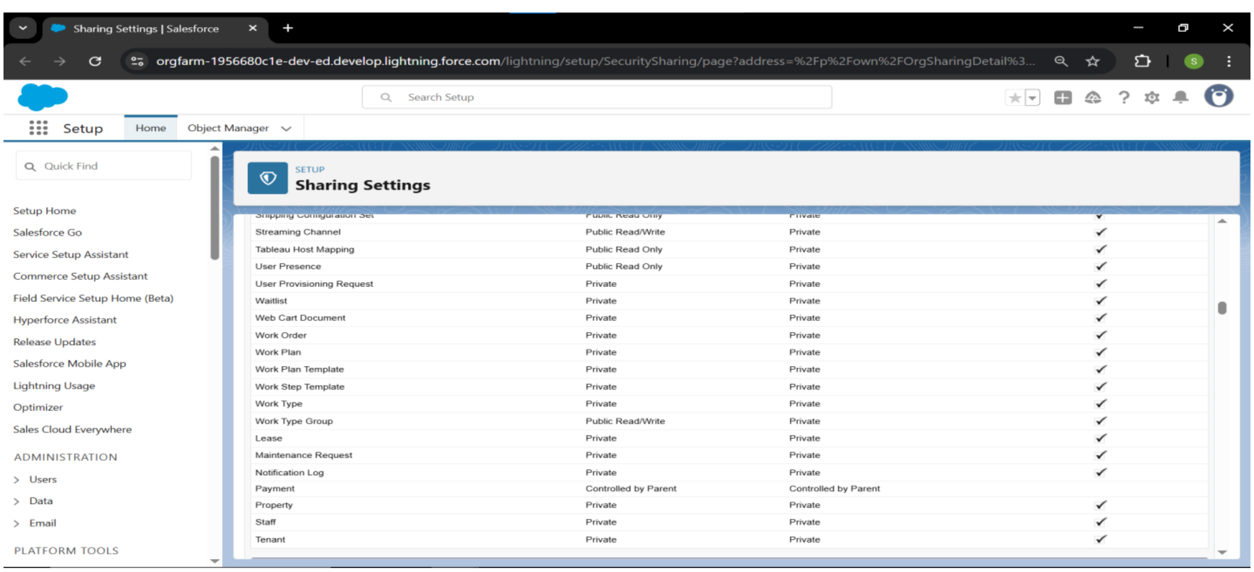


OWD (Organization-Wide Defaults):

- **Primary Objective:** To establish the highest level of record-level security across the organization, following the best practice of starting with the most restrictive setting.
- **Security Setting Applied:**
  1. The **Private** sharing model was applied to all core custom objects (Property, Lease, Tenant).
  2. This ensures that by default, a user can only access records they **own** or records owned by subordinates in the **Role Hierarchy**.
- **Impact on Security Model:**The OWD Private setting makes the established **Role Hierarchy** and the creation of **Sharing Rules** mandatory for granting necessary business access exceptions.

OWD (Organization-Wide Defaults): Implementation

- **1. Access Sharing Settings:**
  - **Step:** Click the **gear icon** and navigate to **Setup**.
  - **Step:** Use Quick Find to search for and select `Sharing Settings`.
- **2. Enter Edit Mode:**
  - **Step:** Find the **Organization-Wide Defaults** section.
  - **Step:** Click the **Edit** button.
- **3. Configure Default Access (The Private Baseline):**
  - **Action:** For all of your custom objects: **Property, Tenant, Lease, Maintenance Request, Staff/User,** and **Notification Log**.
  - **Action:** Set the **Default Internal Access** dropdown to **Private**.
  - **Detail:** Confirm the **Payment** object automatically shows **Controlled by Parent**.
  - **Action:** Set the **Default External Access** dropdown to **Private** for all custom objects.
- **4. Save Changes:**
  - **Step:** Click **Save**. The system will start recalculating sharing access.



Sharing Rules:

- **Primary Objective:** To create necessary exceptions to the OWD Private model, ensuring cross-functional visibility is granted only where required by the business process.
- **Rule 1: Financial Oversight (Lease Object):**
    1. **Type:** Criteria-Based Sharing Rule.
    2. **Purpose:** Provides the Finance Team with **Read Only** access to all active Lease records.
    3. **Result:** This access automatically extends to the child **Payment** records (due to **Controlled by Parent** OWD), fulfilling the reconciliation requirement.
- **Rule 2: Service Collaboration (Maintenance Request Object):**

    1. **Type:** Owner-Based Sharing Rule.
    2. **Purpose:** Grants the **Maintenance Staff** role **Read/Write** access to all requests owned by the **Tenant** role.
    3. **Result:** Enables the staff to view and update the status of any open request, streamlining the service workflow

Sharing Rules: Implementation

- **1. Access Sharing Settings:**
    - **Step:** Click the **gear icon** and navigate to **Setup**.
    - **Step:** Use Quick Find to search for and select `Sharing Settings`.
    - **Step:** Scroll down to the **Sharing Rules** section.

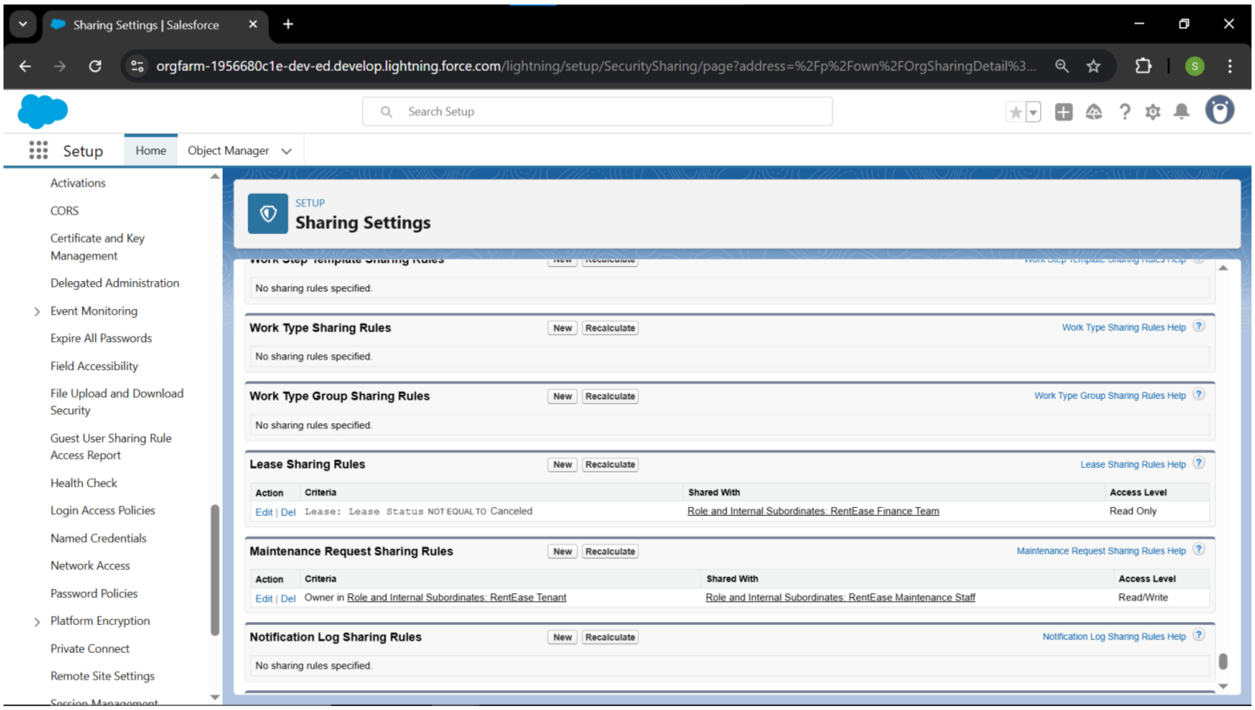
2. Rule 1: Share Leases with Finance Team

- **Goal:** Allow the Finance Team to see all Lease and associated Payment records.
- **Step:** Find the **Lease Sharing Rules** section and click **New**.
- **Step: Rule Name:** `Share Leases with Finance`
- **Step: Rule Type:** Select **Based on Criteria**.
- **Action:** Define the criteria: **Field:** `Lease Status` **Operator:** `not equal to` **Value:** `Canceled`. (This includes all active/pending leases).
- **Action: Share With:** Select **Roles and Subordinates → RentEase Finance Team**.
- **Action: Access Level:** Set to **Read Only**.
- **Step:** Click **Save**.

3. Rule 2: Share Maintenance Requests

- **Goal:** Allow the Maintenance Staff to see all requests submitted by Tenants.
- **Step:** Find the **Maintenance Request Sharing Rules** section and click **New**.
- **Step: Rule Name:** `Share All Maintenance Requests`
- **Step: Rule Type:** Select **Based on Record Owner**.
- **Action: Records Owned By:** Select **Roles and Subordinates → RentEase Tenant** role.
- **Action: Share With:** Select **Roles and Subordinates → RentEase Maintenance Staff** role.

- **Action: Access Level:** Set to **Read/Write** (so staff can update the status).
- **Step:** Click **Save**.

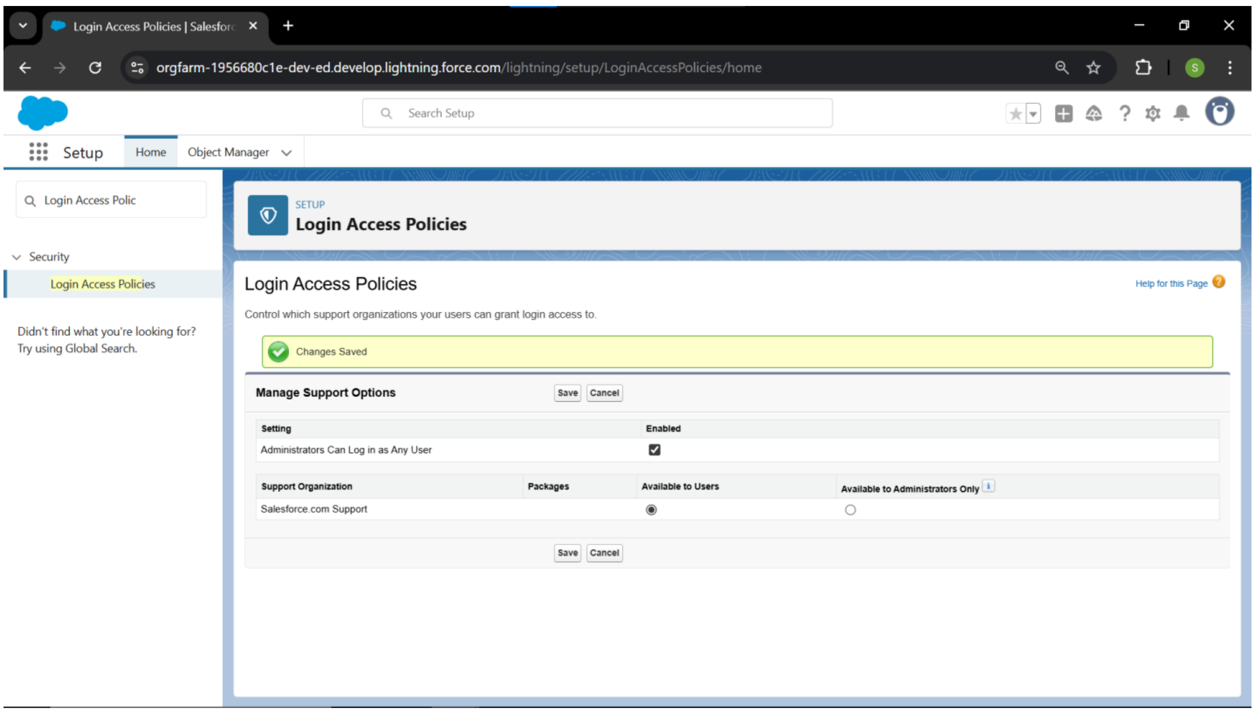


Login Access Policies:

- **Primary Objective:** To control and audit the ability of administrators and external parties to access user accounts for support and maintenance purposes.
- **Internal Policy:**
  1. The setting **"Administrators Can Log In as Any User"** is **enabled**.
  2. This policy is essential for the Admin and Property Manager roles to troubleshoot security, permissions, and user-reported issues without requiring passwords.
- **External Policy:**
  1. Access for **External Service Providers** (Salesforce support, partners) is currently **disabled**.
  2. This adheres to a high-security posture, ensuring no external party can access the org without explicit, temporary authorization.

Login Access Policies: Implementation

- **1. Access Login Access Settings:**
  - **Step:** Click the **gear icon** and navigate to **Setup**.
  - **Step:** Use Quick Find to search for and select `Login Access Policies`.
- **2. Configure Internal Admin Access:**
  - **Action:** Review the setting for **Administrators Can Log In as Any User**.
  - **Action:** Ensure this box is **checked**.
  - **Detail:** This permission allows System Administrators (or users with specific permissions, like the Property Manager) to log in as a Tenant or Maintenance Staff user to test permissions or troubleshoot an issue directly.
  - **Step:** Click **Save** if you made a change.



Dev Org Setup:

- **Primary Objective:** To configure the core developer instance, ensuring tools are available and a standardized development environment is established.
- **Development Environment:**
    1. The primary development is housed in a clean **Developer Edition** instance.
    2. This instance provides **full configuration access**.
- **Project Tools:**

    1. **VS Code and Salesforce CLI (SFDX)** are established as the mandatory tools for **metadata management** and **Apex/LWC development**.
- **Application Container:**

    1. The core application, **RentEase (Lightning App)**, has been created.
    2. This App is the unified interface where all users will access the system, and it has been assigned visibility to all custom internal profiles.

Dev Org Setup: Implementation Steps □

- **1. Verify Environment & License:**
    - **Step:** Go to **Setup** → `Company Information`.
    - **Step:** Verify that the **Organization Edition** is **Developer Edition**.
    - **Detail:** This confirms you have the necessary features for the entire project lifecycle.
- **2. Establish Naming Convention (Best Practice):**
    - **Step:** Define a standard prefix for all components
    - **Detail:** This ensures all custom components are easily identifiable and don't conflict with standard Salesforce names.
- **3. Create the Main Lightning App:**
    - **Step:** Use Quick Find to search for and select `App Manager`.
    - **Step:** Click **New Lightning App**.
    - **Action:** Name the app **RentEase**. Choose a brand image/color.
    - **Action:** Set the **User Profiles** that can see the app
    - **Step:** Click **Save and Finish**.
- **4. Tools Checklist:**
    - **Step:** Ensure you have **Visual Studio Code (VS Code)** installed.
    - **Step:** Ensure the **Salesforce Extension Pack** is installed within VS Code.
    - **Step:** Ensure the **Salesforce CLI** is installed and authorized for this Org