SALESFORCE PROJECT

PROJECT TITTLE :RealEstate CRM (Property & Agent Management)

PROBLEM: Real estate firms struggle with property listings, agent performance, and client leads. Solution

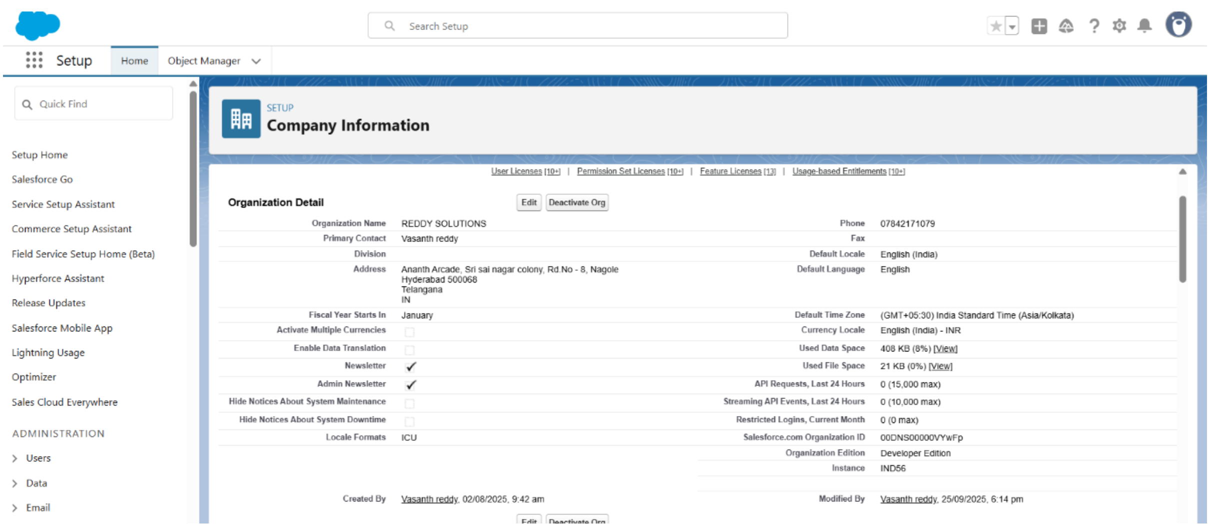
Phase 2: Org Setup & Configuration

A) Salesforce Editions — Recommendation

- **Developer Org** (free, full features, for practice/project building).
- **Enterprise Edition** (real-world choice for CRM customization, required for features like multiple profiles, role hierarchy, advanced sharing).
- **Professional** (too limited, lacks API access, not suitable).
- **Unlimited** (overkill for this project demo).

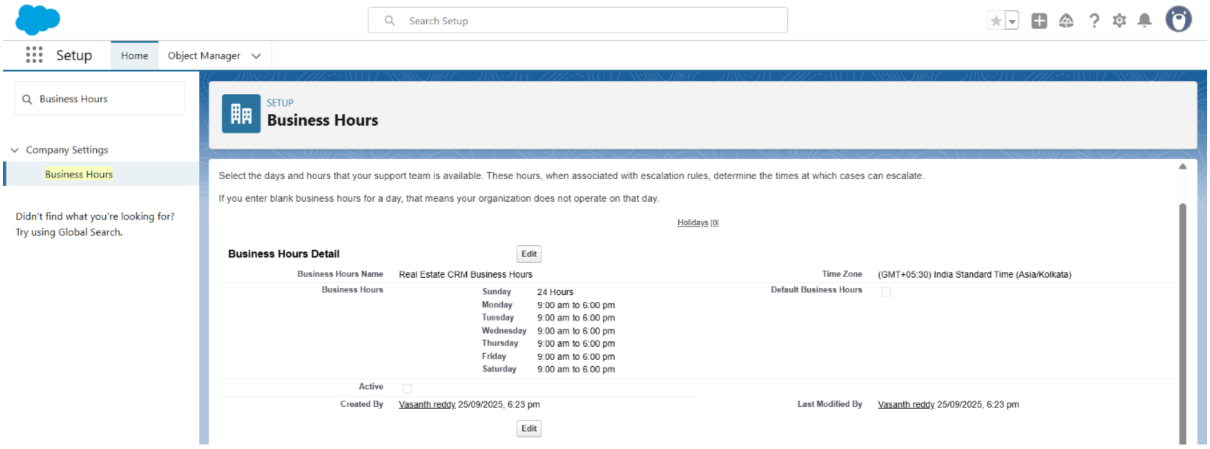
B)Company Profile Setup

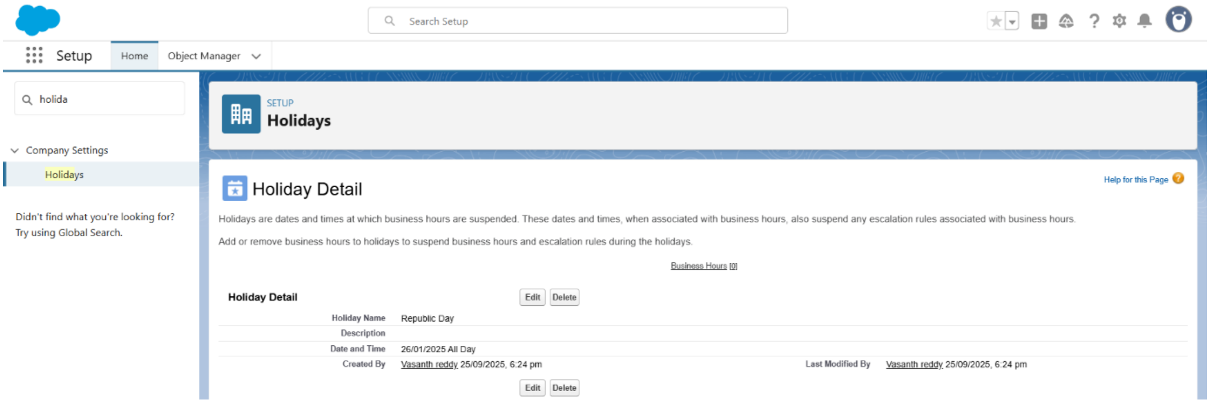
- ☐ **Company Information**
  - Company Name, Address, Primary Contact, Currency.
  - Default Time Zone: IST (+05:30) [adjust as per client].
  - Default Locale: English (India).
  - Fiscal Year = Standard Gregorian (custom FY if real estate business uses Apr–Mar).



□ **Business Hours & Holidays**

- Create Business Hours: Mon–Sat, 9 AM–6 PM.
- Add holidays: National Holidays (Jan 26, Aug 15, Oct 2, etc.).
- These will be used in SLAs, Escalations, Case Management (if extended).





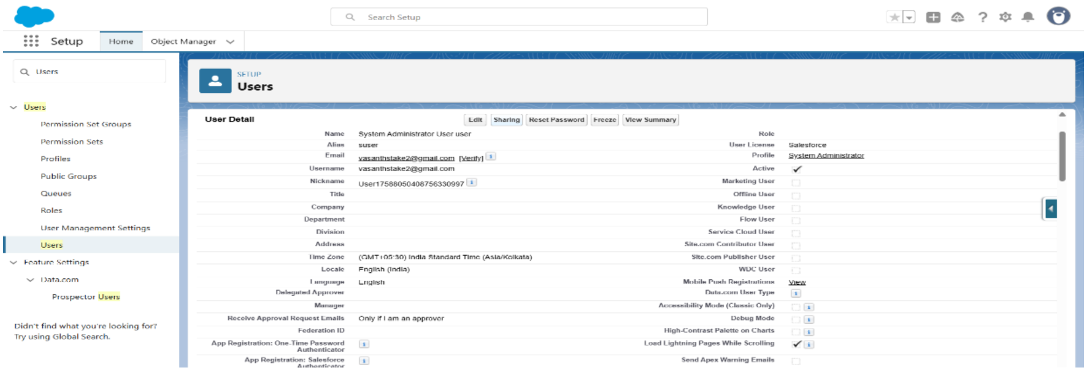
- □ **Fiscal Year Settings**
  - Default: Standard FY (Jan–Dec).
  - Custom FY: Apr–Mar (Indian real estate firms).
  - Align with reporting needs.

C. User Setup & Licenses

User Types

- **System Administrator** — 2 users (project owner, backup).
- **Sales Manager** — 1–2 users.
- **Agent** — multiple.
- **Portal Guest User** — for Experience Cloud site access (property search).
- **Integration User** — dedicated user for APIs, Named Credentials.

- **Licenses**
  - Sales Cloud License (for full CRM).
  - Experience Cloud License (for external portal).
  - Platform License (if only custom objects needed for some users).



D)Profiles

1. System Administrator

- Full access to all objects, Apex, setup, and deployment.
- Manages org configuration, users, roles, and sharing rules.

2. Sales Manager

- Read/Write on all objects.
- Can manage reports/dashboards and view agents' records via Role Hierarchy.

3. Agent

- Read/Write only on their own Deals, Clients, Properties.
- Cannot delete Contracts.

4. Portal Guest User

- Read-only access to Property listings (selected fields) for external users.

E)Roles (Role Hierarchy)

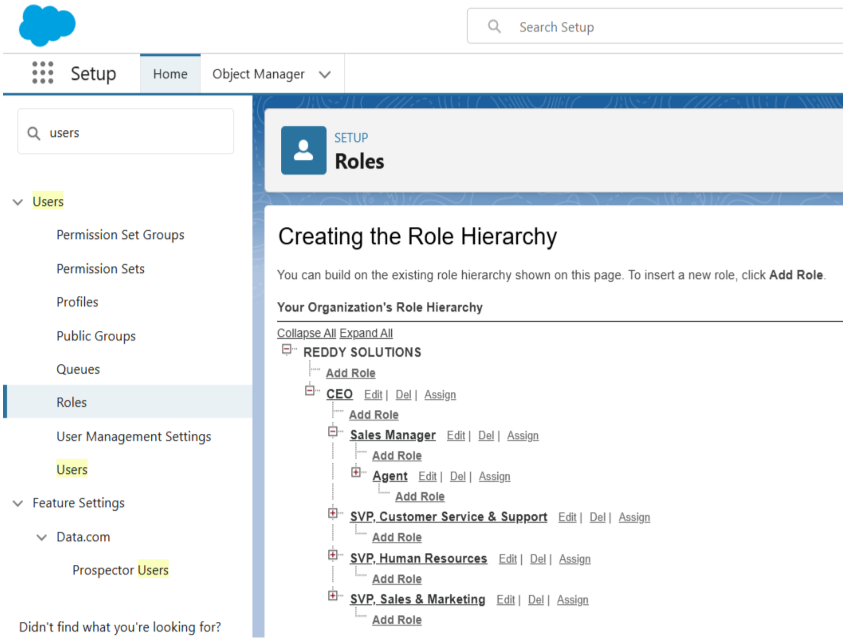
CEO (optional)

└── Sales Director

    └── Sales Manager

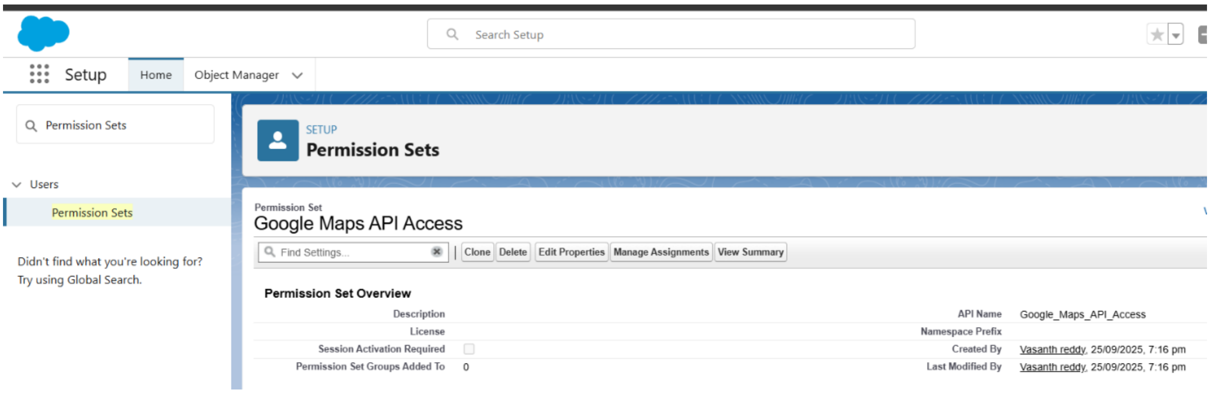
        └── Agents (per region)

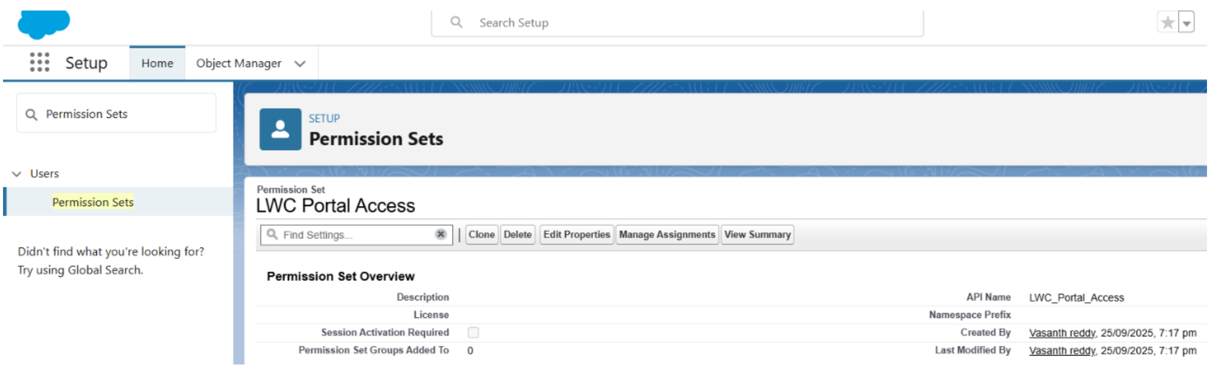
- Role hierarchy ensures managers see team records.
- Portal Guest has **no role** in hierarchy.

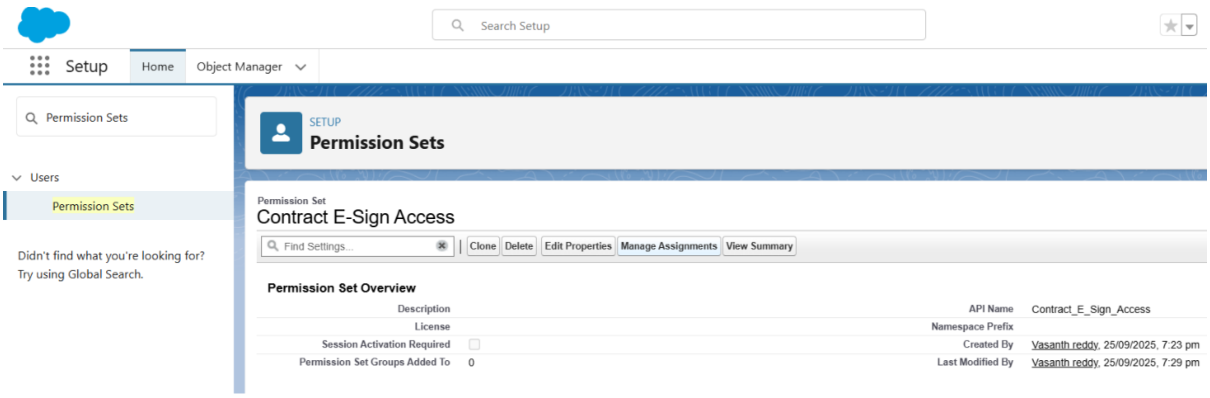


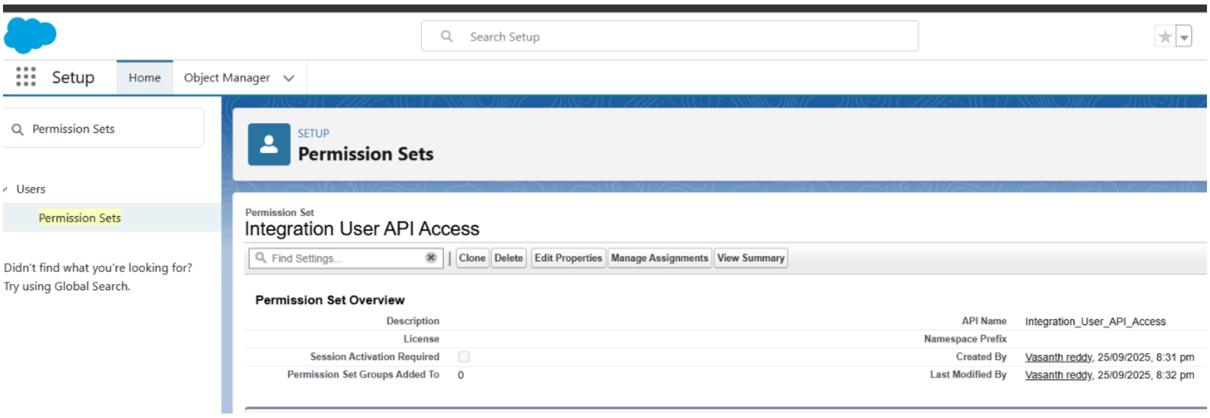
F. Permission Sets (granular access)

- **Google Maps API Access** — permission to Named Credential.
- **LWC Portal Access** — permission to custom Lightning pages.
- **Contract E-Sign Access** — permission to connected app (DocuSign/Conga).
- **Integration User** — restricted permission set, only API access to required objects.



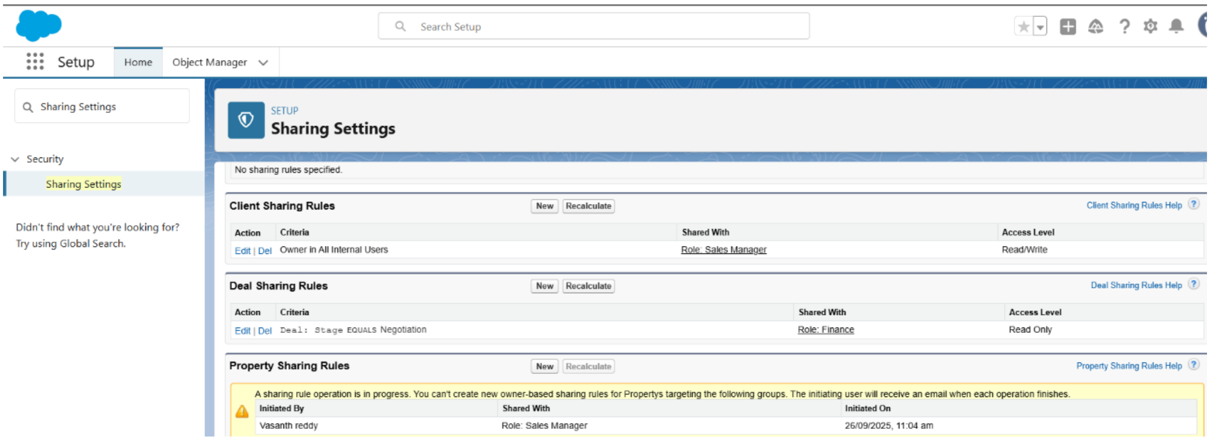






H. Sharing Rules

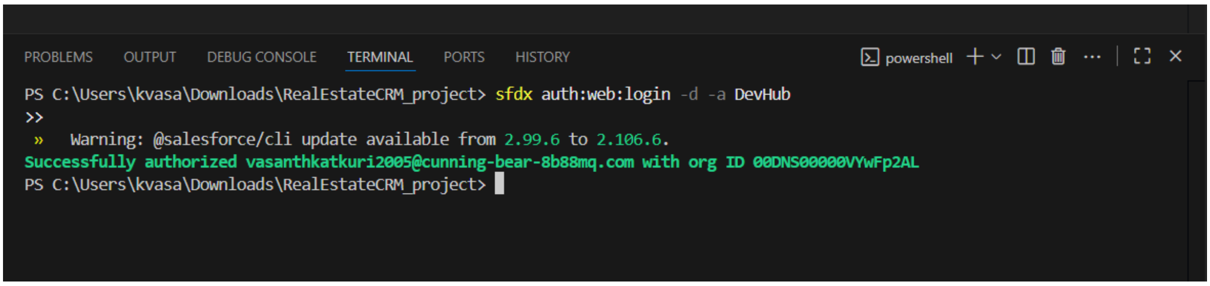
- **Client__c**: Share records with Sales Manager role so managers see all client records.
- **Deal__c**: Criteria-based sharing (Stage = Negotiation/Closed) with Finance role.
- **Property__c**: Public read; update restricted to Agents & Managers.



J. Dev Org Setup

1. Create a **Developer Edition Org**.
2. Enable **Dev Hub** for SFDX projects.
3. Install **VS Code + Salesforce CLI**.

4. Connect org: sfdx auth:web:login -d -a DevHub
5. Create scratch orgs for testing: sfdx force:org:create -s -f config/project-scratch-def.json -a RealEstateCRM



L. Deployment Basics

force-app/main/default/

├── objects/

├── lwc/

├── classes/

├── triggers/

├── flows/