

SALESFORCE PROJECT

PROJECT TITLE :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).

The screenshot displays the Salesforce Setup interface. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area is titled 'Company Information' and includes tabs for User Licenses, Permission Set Licenses, Feature Licenses, and Usage-based Entitlements. The 'Organization Detail' section is active, showing fields for Organization Name (REDDY SOLUTIONS), Primary Contact (Vasanth reddy), Phone (07842171079), Fax, Division, Address (Ananth Arcade, Sri sai nagar colony, Rd No - 8, Nagole, Hyderabad 500068, Telangana, IN), Default Locale (English (India)), and Default Language (English). The 'Fiscal Year Starts In' is set to January. The 'Default Time Zone' is (GMT+05:30) India Standard Time (Asia/Kolkata). The 'Currency Locale' is English (India) - INR. The 'Used Data Space' is 408 KB (8%) [View]. The 'Used File Space' is 21 KB (0%) [View]. The 'API Requests, Last 24 Hours' is 0 (15,000 max). The 'Streaming API Events, Last 24 Hours' is 0 (10,000 max). The 'Restricted Logins, Current Month' is 0 (0 max). The 'Salesforce.com Organization ID' is 00DNS00000YwFp. The 'Organization Edition' is Developer Edition. The 'Instance' is IND56. The 'Created By' is Vasanth reddy, 02/08/2025, 9:42 am. The 'Modified By' is Vasanth reddy, 25/09/2025, 6:14 pm.

□ 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).

The screenshot shows the 'Business Hours' setup page in Salesforce. The left sidebar has 'Setup' selected, with 'Business Hours' in the search bar and 'Company Settings' expanded. The main content area is titled 'Business Hours' and includes instructions: '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.' Below this is a table for 'Business Hours Detail' for 'Real Estate CRM Business Hours'. The table shows days from Sunday to Saturday with their respective hours (9:00 am to 6:00 pm) and a '24 Hours' option for Sunday. There are 'Edit' buttons for the table and the record. At the bottom, it shows 'Active' as checked, 'Created By' as 'Vasanth.reddy' on '25/09/2025, 6:23 pm', and 'Last Modified By' as 'Vasanth.reddy' on '25/09/2025, 6:23 pm'.

The screenshot shows the 'Holidays' setup page in Salesforce. The left sidebar has 'Setup' selected, with 'Holidays' in the search bar and 'Company Settings' expanded. The main content area is titled 'Holidays' and includes instructions: 'Holidays are dates and times at which business hours are suspended. These dates and times, when associated with business hours, also suspend any escalation rules associated with business hours. Add or remove business hours to holidays to suspend business hours and escalation rules during the holidays.' Below this is a table for 'Holiday Detail' for 'Republic Day'. The table shows the 'Date and Time' as '26/01/2025 All Day'. There are 'Edit' and 'Delete' buttons for the table and the record. At the bottom, it shows 'Created By' as 'Vasanth.reddy' on '25/09/2025, 6:24 pm' and 'Last Modified By' as 'Vasanth.reddy' on '25/09/2025, 6:24 pm'.

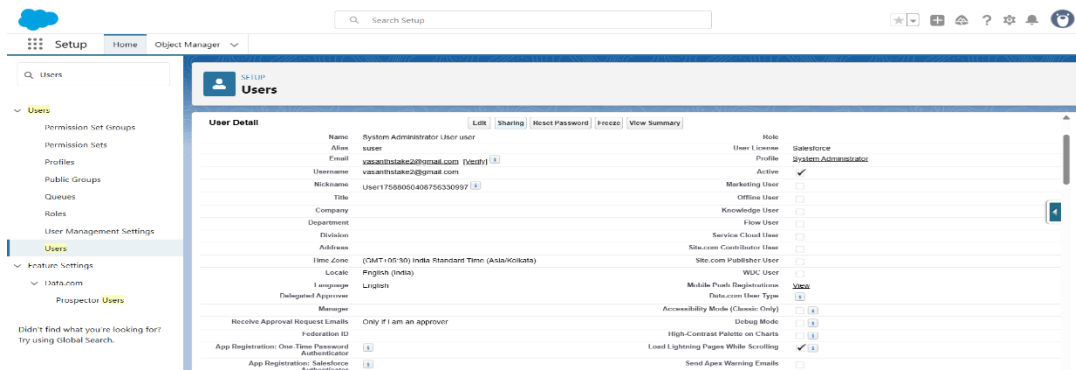
• □ Fiscal Year Settings

- 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.

The screenshot shows the Salesforce Setup interface with the 'Roles' page selected. The left sidebar contains a search bar with 'users' and a list of navigation items: Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles (highlighted), User Management Settings, Users, Feature Settings, Data.com, and Prospector Users. The main content area is titled 'Roles' and 'Creating the Role Hierarchy'. It explains that users can build on the existing role hierarchy and provides a link to 'Add Role'. Below this, the 'Your Organization's Role Hierarchy' is displayed as a tree structure for 'REDDY SOLUTIONS'. The hierarchy starts with 'REDDY SOLUTIONS' at the top, followed by 'CEO', 'Sales Manager', 'Agent', 'SVP Customer Service & Support', 'SVP Human Resources', and 'SVP Sales & Marketing'. Each role has an 'Add Role' link and buttons for 'Edit', 'Del', and 'Assign'.

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.

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' page selected. The left sidebar contains a search bar with 'Permission Sets' and a list of navigation items: Users, Permission Sets (highlighted), and a message 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Permission Sets' and 'Google Maps API Access'. It includes a search bar with 'Find Settings...' and buttons for 'Clone', 'Delete', 'Edit Properties', 'Manage Assignments', and 'View Summary'. Below this, the 'Permission Set Overview' is displayed as a table with the following data:

Permission Set Overview	
Description	API Name Google_Maps_API_Access
License	Namespace Prefix
Session Activation Required	Created By Vasanith reddy, 25/09/2025, 7:16 pm
Permission Set Groups Added To 0	Last Modified By Vasanith reddy, 25/09/2025, 7:16 pm

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' page selected. The left sidebar contains a search bar with 'Permission Sets' and a list of navigation items: Users, Permission Sets (highlighted), and a message 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Permission Sets' and 'LWC Portal Access'. It includes a search bar with 'Find Settings...' and buttons for 'Clone', 'Delete', 'Edit Properties', 'Manage Assignments', and 'View Summary'. Below this, the 'Permission Set Overview' is displayed as a table with the following data:

Permission Set Overview	
Description	API Name LWC_Portal_Access
License	Namespace Prefix
Session Activation Required	Created By Vasanith reddy, 25/09/2025, 7:17 pm
Permission Set Groups Added To 0	Last Modified By Vasanith reddy, 25/09/2025, 7:16 pm

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'Permission Sets' and a list of categories including Users and Permission Sets. The main content area is titled 'Permission Sets' and shows details for the 'Contract E-Sign Access' permission set. It includes a search bar, buttons for Clone, Delete, Edit Properties, Manage Assignments, and View Summary. Below this is a 'Permission Set Overview' table.

Permission Set Overview		API Name	Contract_E_Sign_Access
Description		Namespace Prefix	
License		Created By	Vasanth.reddy, 25/09/2025, 7:23 pm
Session Activation Required	<input type="checkbox"/>	Last Modified By	Vasanth.reddy, 25/09/2025, 7:29 pm
Permission Set Groups Added To	0		

The screenshot shows the Salesforce Setup interface for the 'Integration User API Access' permission set. It follows the same layout as the previous screenshot, with a search bar, buttons for management actions, and a 'Permission Set Overview' table.

Permission Set Overview		API Name	Integration_User_API_Access
Description		Namespace Prefix	
License		Created By	Vasanth.reddy, 25/09/2025, 8:31 pm
Session Activation Required	<input type="checkbox"/>	Last Modified By	Vasanth.reddy, 25/09/2025, 8:32 pm
Permission Set Groups Added To	0		

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.

The screenshot shows the Salesforce Setup interface for 'Sharing Settings'. The left sidebar has a search bar with 'Sharing Settings' and a list of categories including Security and Sharing Settings. The main content area is titled 'Sharing Settings' and shows a message 'No sharing rules specified.' Below this are three sections for 'Client Sharing Rules', 'Deal Sharing Rules', and 'Property Sharing Rules', each with a 'New' button, a 'Recalculate' button, and a 'Help' link. Each section contains a table with columns for Action, Criteria, Shared With, and Access Level.

Client Sharing Rules			
Action	Criteria	Shared With	Access Level
Edit Del	Owner in All Internal Users	Role: Sales Manager	Read/Write

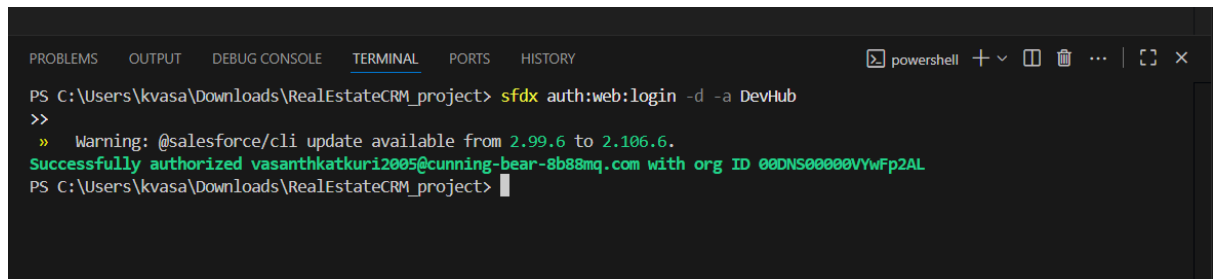
Deal Sharing Rules			
Action	Criteria	Shared With	Access Level
Edit Del	Deal: Stage EQUALS Negotiation	Role: Finance	Read Only

Property Sharing Rules			
A sharing rule operation is in progress. You can't create new owner-based sharing rules for Property types targeting the following groups. The initiating user will receive an email when each operation finishes.			
Initiated By	Shared With	Initiated On	
Vasanth.reddy	Role: Sales Manager	25/09/2025, 11:04 am	

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



```
PROBLEMS OUTPUT DEBUG CONSOLE TERMINAL PORTS HISTORY
PS C:\Users\kvasa\Downloads\RealEstateCRM_project> sfdx auth:web:login -d -a DevHub
>>
» Warning: @salesforce/cli update available from 2.99.6 to 2.106.6.
Successfully authorized vasanthkatkuri12005@cunning-bear-8b88mq.com with org ID 00DNS00000VYwFp2AL
PS C:\Users\kvasa\Downloads\RealEstateCRM_project>
```

L. Deployment Basics

force-app/main/default/

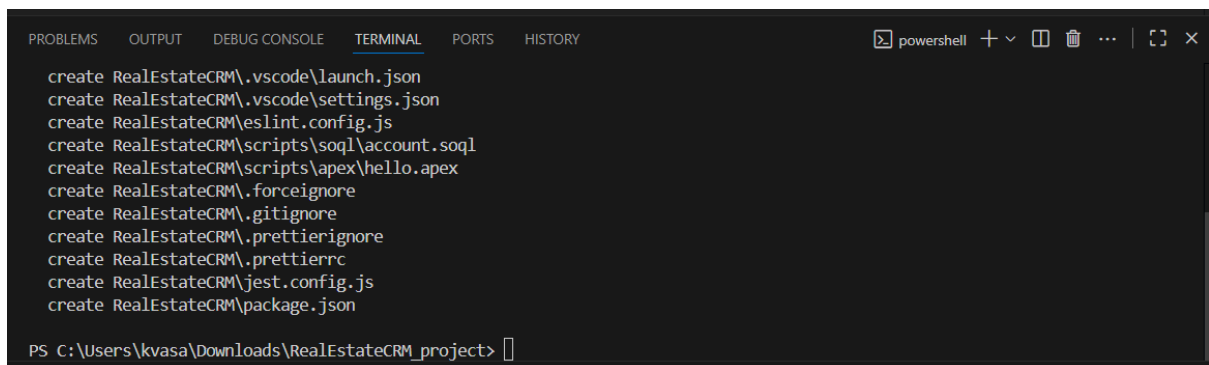
├─ objects/

├─ lwc/

├─ classes/

├─ triggers/

├─ flows/



```
PROBLEMS OUTPUT DEBUG CONSOLE TERMINAL PORTS HISTORY
create RealEstateCRM\.vscode\launch.json
create RealEstateCRM\.vscode\settings.json
create RealEstateCRM\eslint.config.js
create RealEstateCRM\scripts\sql\account.sql
create RealEstateCRM\scripts\apex\hello.apex
create RealEstateCRM\.forceignore
create RealEstateCRM\.gitignore
create RealEstateCRM\.prettierignore
create RealEstateCRM\.prettierrc
create RealEstateCRM\jest.config.js
create RealEstateCRM\package.json
PS C:\Users\kvasa\Downloads\RealEstateCRM_project>
```