

# Phase 2 : Org Setup and Configuration

## Problem statement:

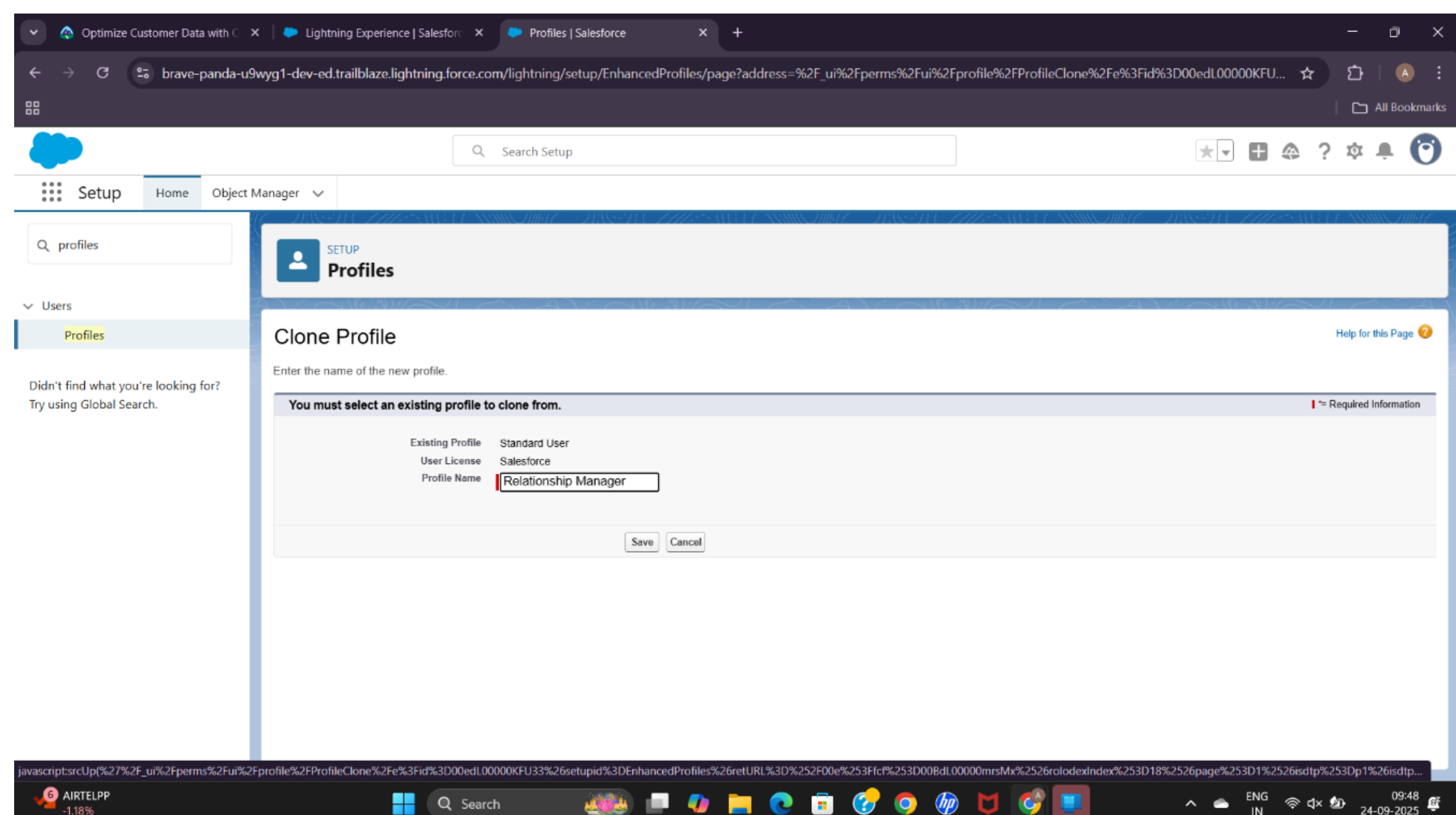
Important banking processes such as customer onboarding, loan approvals, and KYC checks are still manual. Salesforce isn't configured with the custom objects, fields, and workflows needed to handle financial products like loans, accounts, and transactions. Relationship Managers, Loan Officers, Credit Analysts, and Compliance Officers. This creates data security risks because sensitive financial data isn't controlled properly.

## 1.Salesforce edition:

- . Used Salesforce Developer Edition to set up a Banking CRM environment.
- . Configured company information and org defaults in Developer Org.
- . Created custom objects like Loan, Investment, and Service Request.

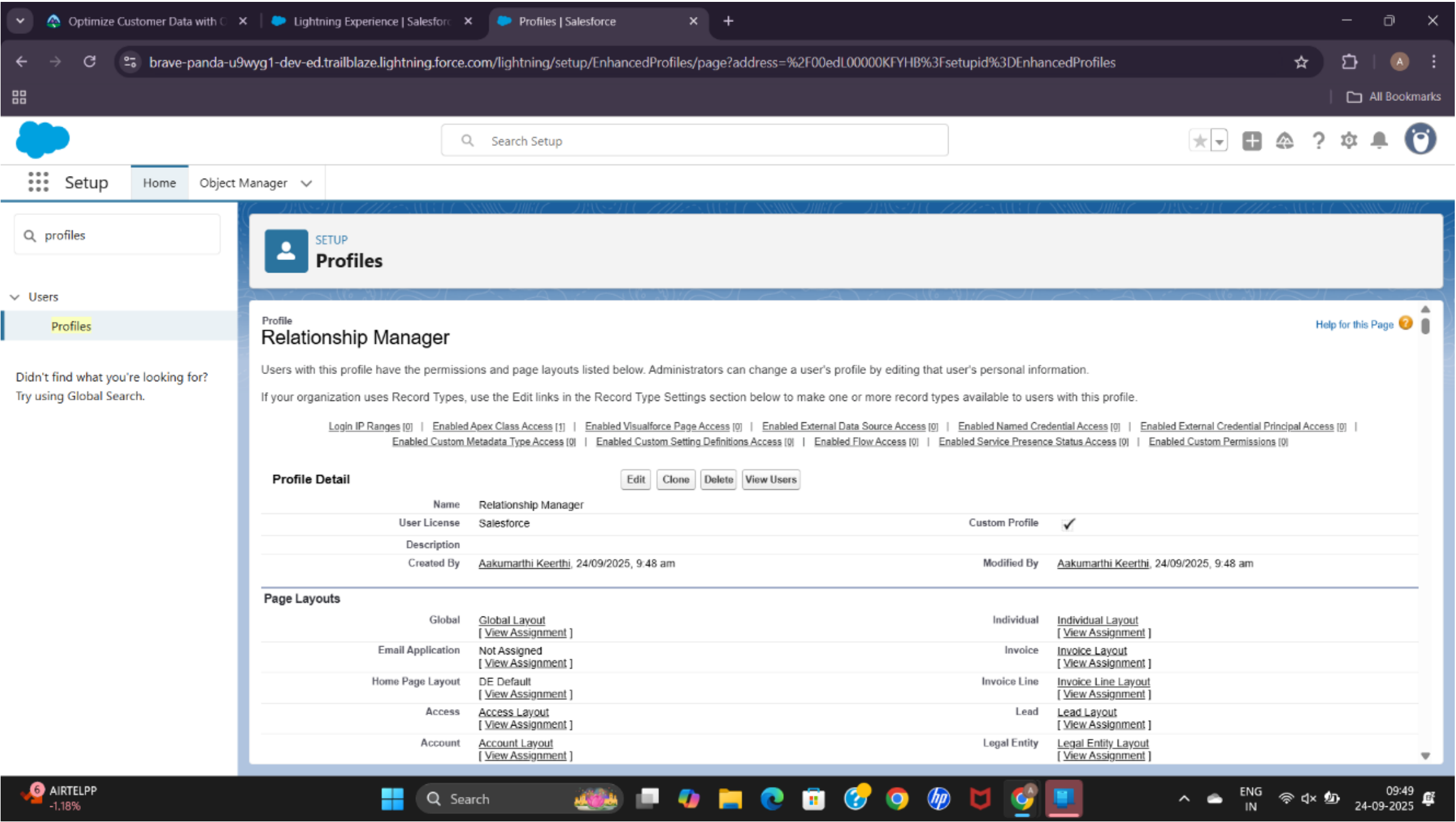
## 2.Profiles:

The Relationship Manager profile is designed for users who interact directly with customers, manage accounts, and track loan or investment requests. This profile ensures RMs can view and update customer data but restricts them from accessing sensitive compliance or admin functions.



**Cloned Profile** → Started from the **Standard User profile** and created a custom profile named **Relationship Manager**.

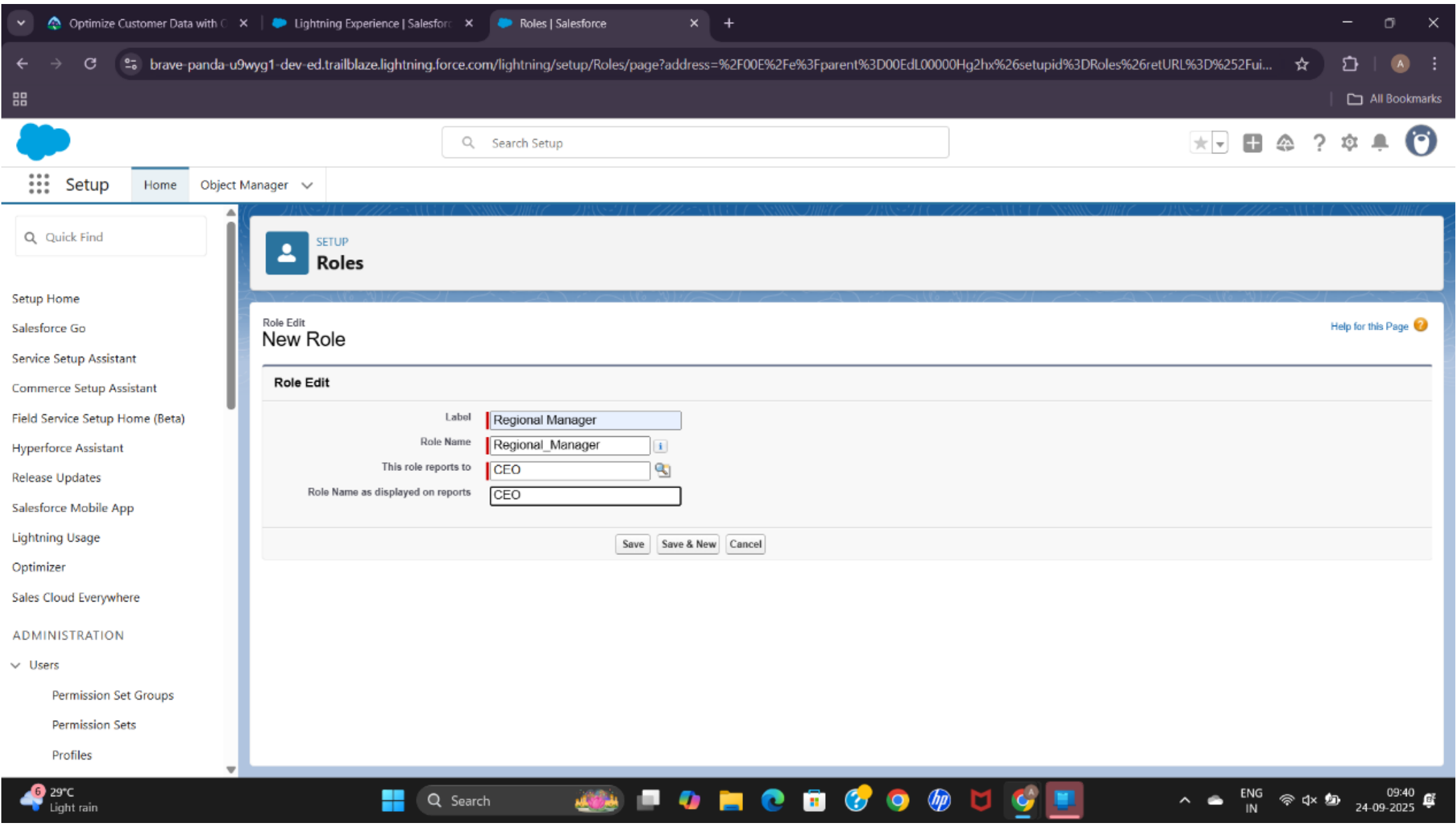
**Login & Security Settings** → Configured the cloned profile with **standard user permissions only** (no “ Modify All” or “ View All” ), ensuring Relationship Managers have controlled access and cannot perform admin-level actions.



### 3.Roles:

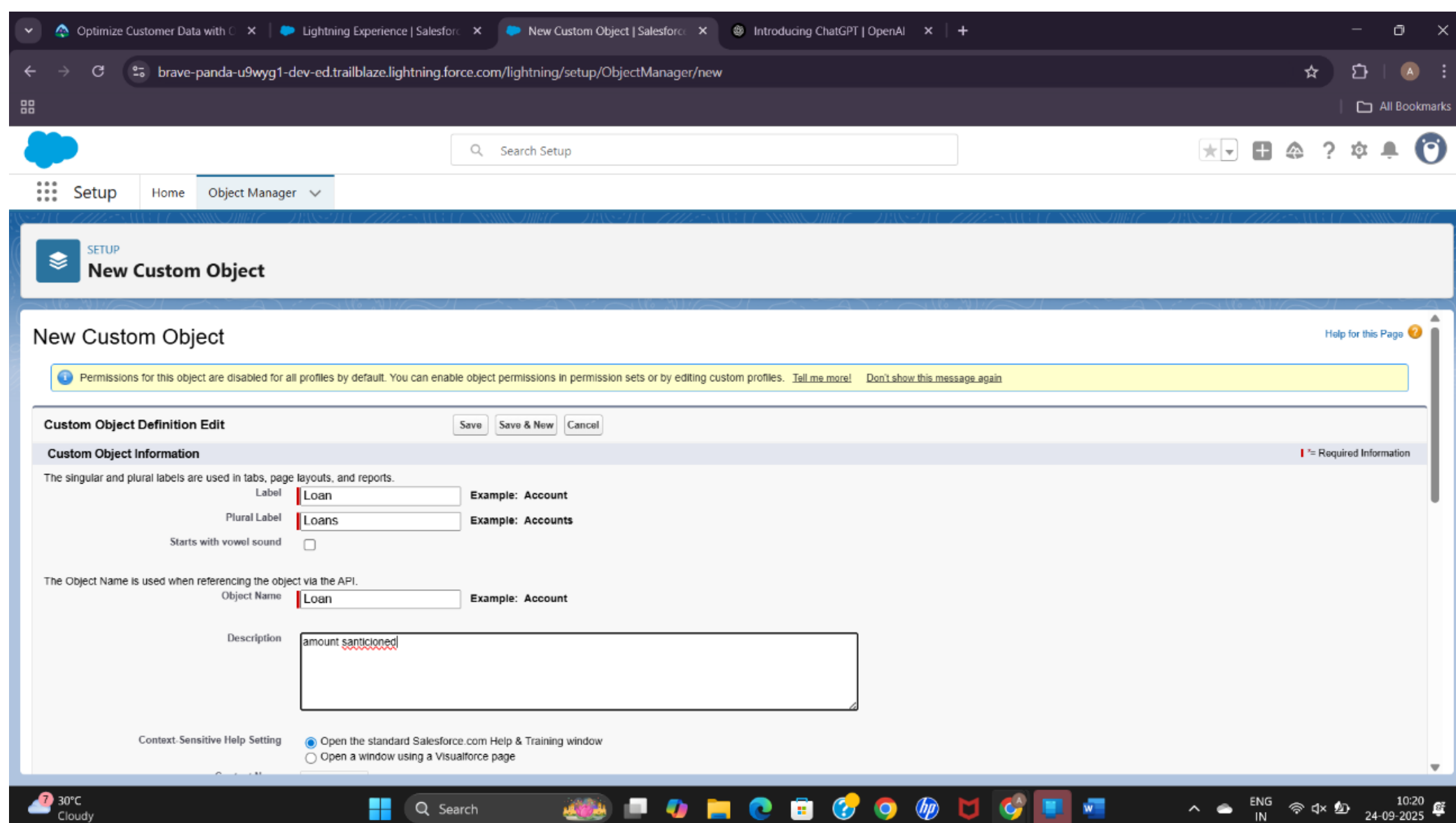
#### Relationship Manager (RM)

- Reports to Branch Manager.
- Can view and edit only their own customer accounts, loans, and service requests.
- Focused on customer interactions, loan applications, and follow-ups.



## 4.Object settings:

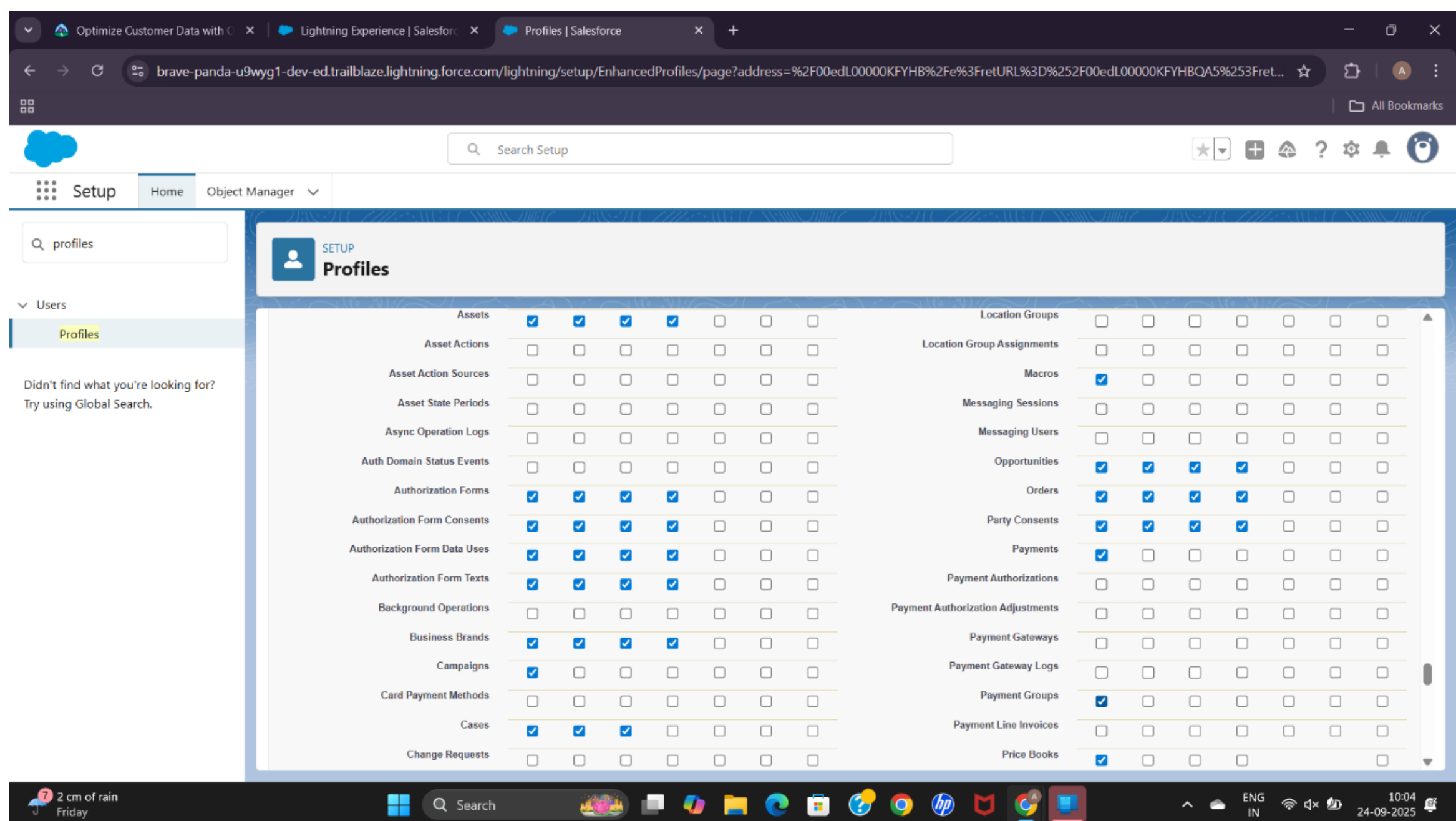
- . Gave Create, Read, and Edit access on the Loan object to Relationship Managers and Loan Officers, while keeping sensitive fields restricted through field-level security.
- . Set the Loan object's default sharing to Private, and used role hierarchy and sharing rules so Branch Managers, Credit Analysts, and Compliance Officers can see the required loan records.



## 5.Permission sets:

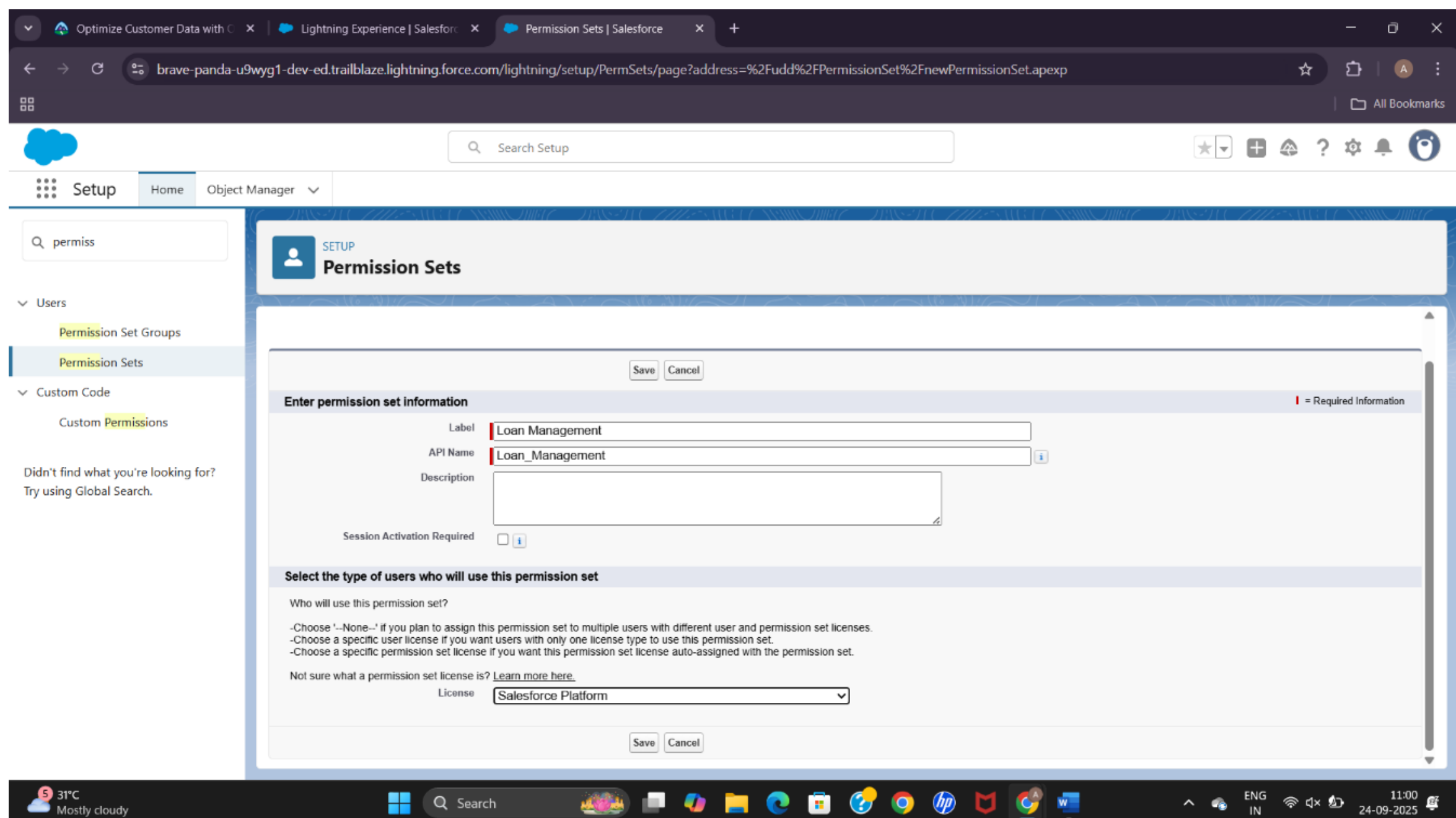
- . Grants additional Create/Edit access on the Loan object for Loan Officers.
- . Allows them to update loan records and submit them for approval beyond their basic profile.
- . Grants access to create and manage **custom reports and dashboards** related to loans, accounts, and investments.
- . Useful for managers who need analytics beyond standard profiles.
- . For Managers to build reports & dashboards.





**Loan Management** → For Loan Officers to create and edit loan applications.

**Loan Approval** → For Branch Managers to approve loans.



## 6.User setup& License:

Salesforce Platform → Limited CRM features; can access custom objects but not standard objects like Leads or Opportunities.

Every Profile or Permission Set must be associated with a **User License**.

## 7.Sandbox Usage:

- . Developer Sandbox → Small, contains metadata only (good for building custom objects, fields, flows).
- . It allows you to safely configure objects, automation, permission sets, and processes.
- . Safely create **custom objects** like Loan, Investment, and Service Request.
- . Configure **profiles, roles, and permission sets** without impacting real users.

## 8.Deployment Basics:

- . Deployment is the process of moving configurations and customizations from one Salesforce Org (usually Sandbox) to another (Production).
- . Ensures that all tested changes (objects, fields, automation, profiles, permission sets) are applied safely in the live system.