# LoanEase: Salesforce Loan Management CRM

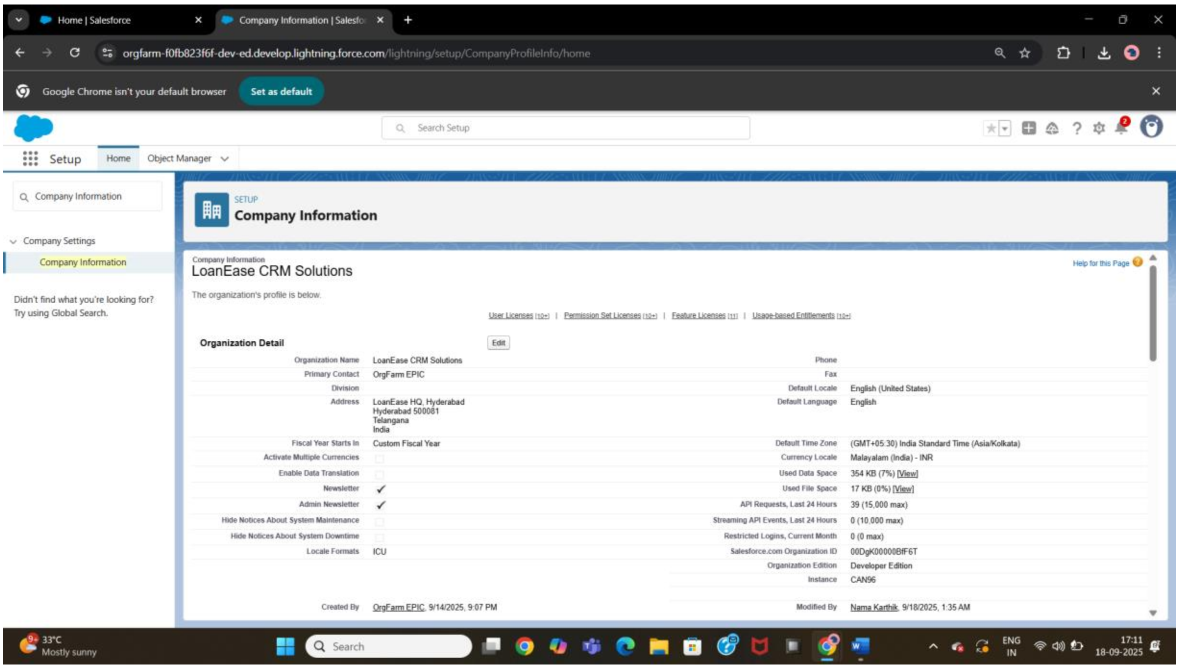
## Phase 2: Org Setup & Configuration for LoanEase CRM

### Salesforce Editions

- Using Salesforce Developer Edition, ideal for learning and small projects.
- Limitations: Only 2 active Salesforce users with full CRM license, others are Chatter Free.

### Company Profile Setup

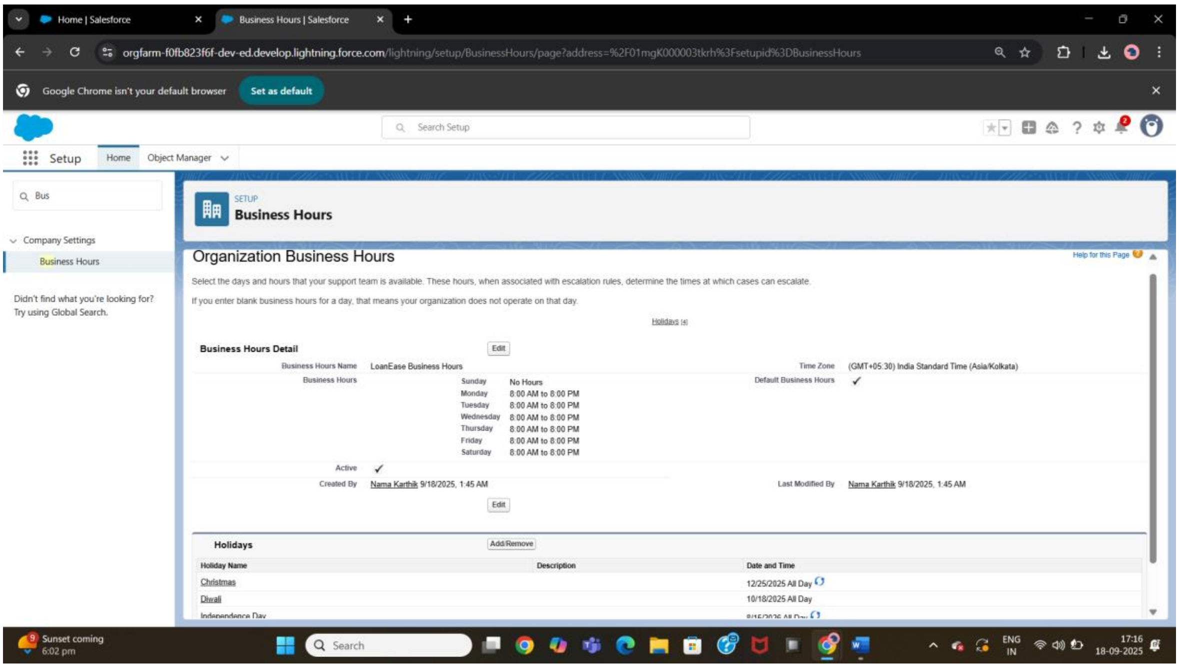
- **Org Name**– LoanEase CRM
- **Setup Configuration:**
    - **Locale:** English (India)
    - **Time Zone:** GMT+05:30 (Kolkata)
    - **Currency:** Indian Rupee (INR)
    - **Language:** English (India)




### Business Hours & Holidays

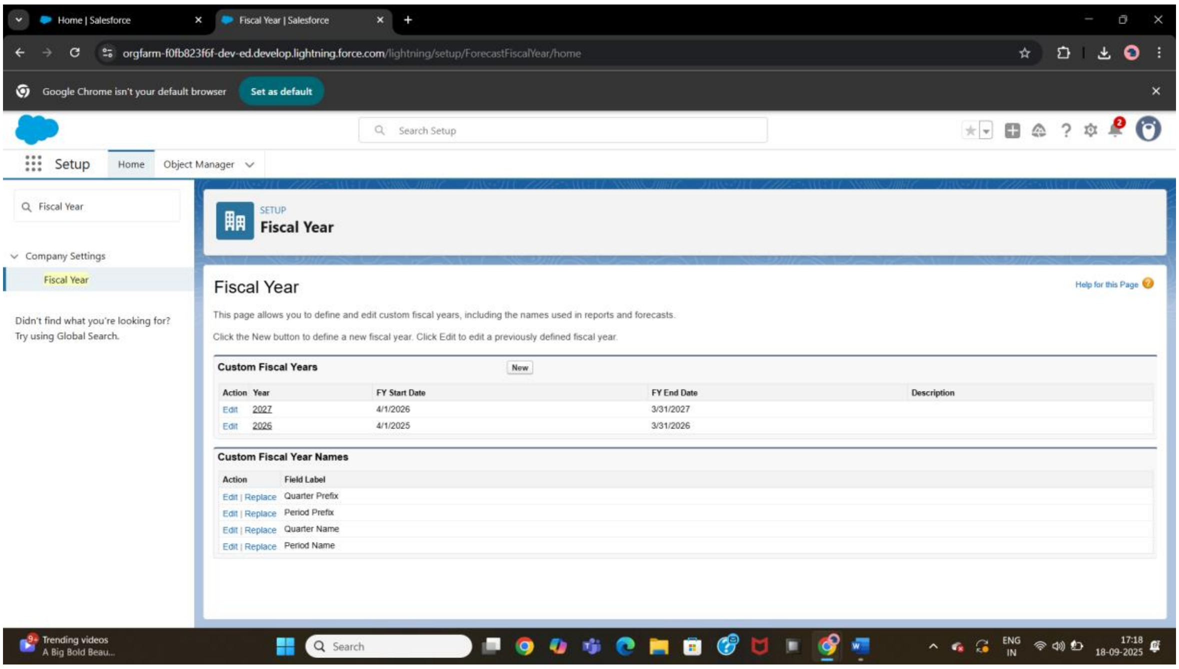
- Configured standard business hours for the organization to reflect working times.
- Business Hours set as:
    - Monday to Saturday: 9:00 AM to 6:00 PM
    - Sunday: Closed
- Used default public holidays of the region (India) or as per project requirement (if configured).

- Business hours are used for tracking service SLAs, escalation rules, and workflows.



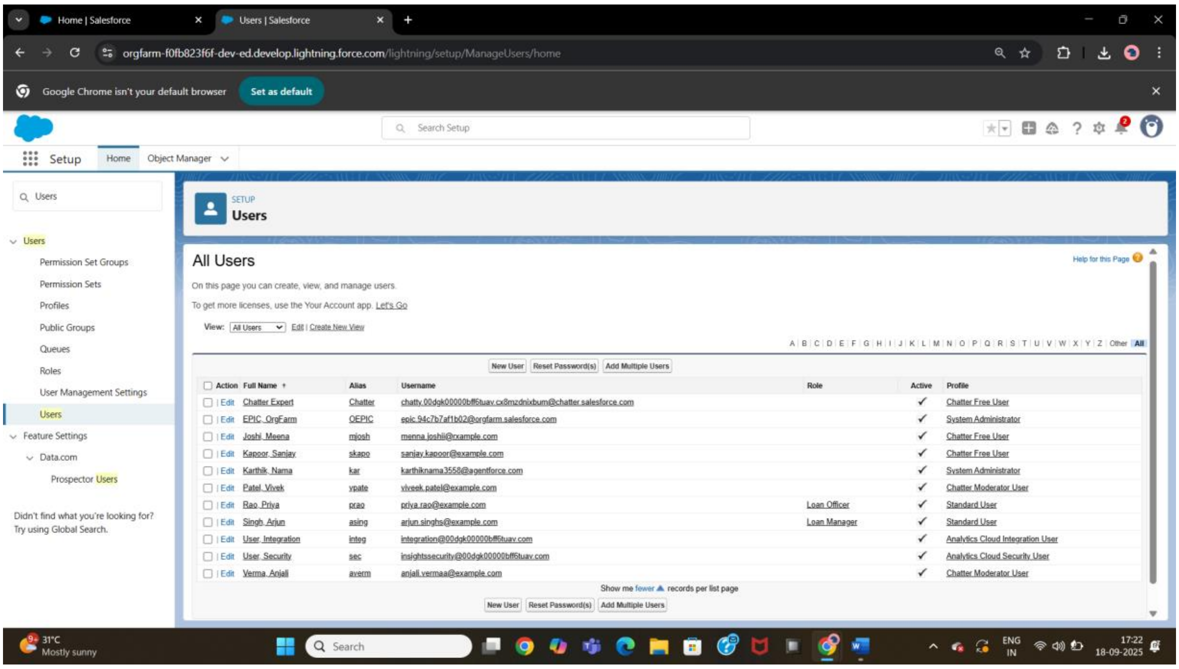
## Fiscal Year Settings

- The fiscal year for LoanEase CRM org is set as a custom fiscal year starting in April, aligning with the company's financial calendar.
- This setup supports business-specific reporting and forecasting periods.



## User Setup & Licenses

- **Created users required for the LoanEase CRM project including:**
  - Priya Rao (Standard User)
  - Arjun Singh (Standard User)
  - Additional users with Chatter Free licenses for role hierarchy and collaboration.
- **License assignments:**
  - Standard User licenses limited to 2 due to Developer Edition constraints.
  - Other users use Chatter Free licenses with limited access.
- Each user is assigned appropriate profiles and roles to reflect their responsibilities in the org.
- User setup ensures proper record access based on sharing and role hierarchy.

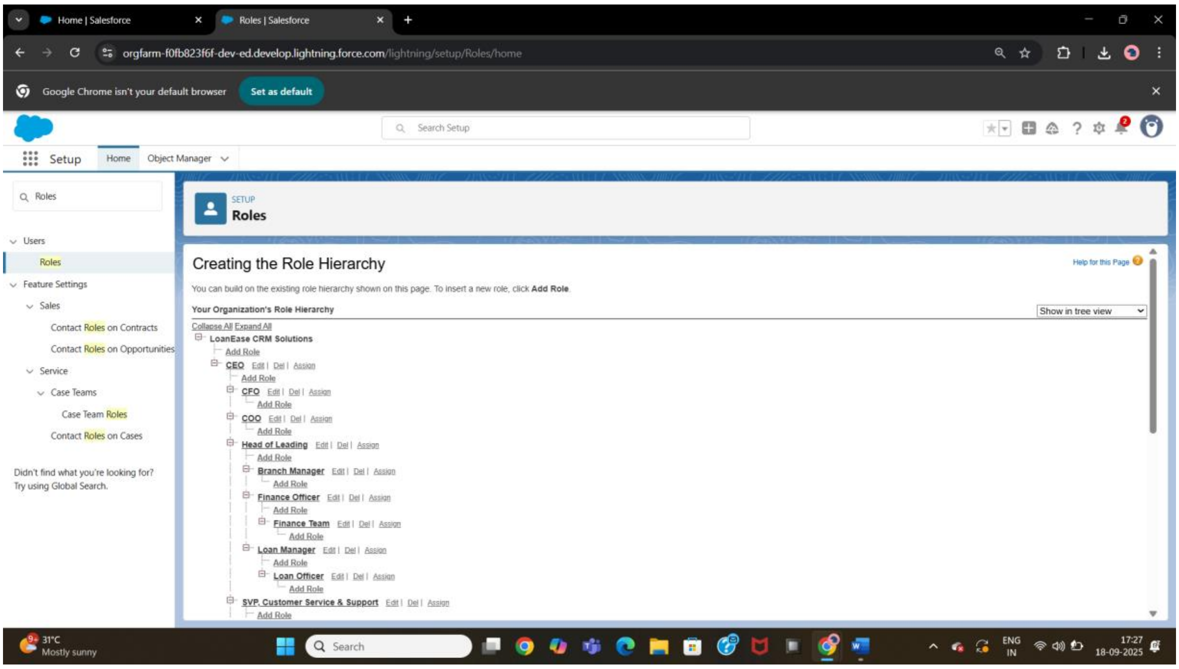



## AppExchange Exploration

- Used the Standard User profile for active CRM users (Priya Rao and Arjun Singh) to allow full access to custom objects and CRM functions.
- Assigned Chatter Free profile for other users to enable role hierarchy visibility and collaboration through Chatter, with limited access to CRM objects.
- Profiles define users' permissions on objects, tabs, and features aligning with their roles in the org.
- No custom profiles created; relied on standard profiles due to project scope and license constraints.

## Roles

- Configured a hierarchical role structure to mirror the organization's management and operational team.
- Roles defined include:
    - CEO
    - CFO
    - COO
    - Head of Lending
    - Branch Manager
    - Finance Officer
    - Loan Manager
    - Loan Officer
- This hierarchy enables record-level access control so higher roles inherit visibility of subordinate records.
- Role assignments were aligned with users to enforce security and data access policies.

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## Permission Sets

- No custom permission sets were created for this project as the standard profiles met the access requirements.
- All users' permissions and access to objects and features were managed using standard profiles (Standard User, Chatter Free).
- Permission sets can be used in a more complex scenario to grant additional permissions without modifying profiles.
- For this project, the role hierarchy and object sharing settings provided sufficient control over data access.

## Organization-Wide Defaults (OWD)

- Organization-Wide Defaults (OWD) for custom objects (Loan, EMI, Payment) are yet to be configured.
- Current record visibility relies on role hierarchy and user ownership.
- Setting OWD to Private is planned to enforce stricter record-level security in upcoming project phases.
- This enhancement will ensure better control over data access, limiting visibility to record owners and their managers.
- The project will include this configuration in the next iteration or deployment phase.

## Sharing Rules

- No custom sharing rules have been created for this project so far.
- Access control currently depends on role hierarchy and user ownership of records.
- Custom sharing rules can be implemented in future phases to extend visibility to specific groups or roles beyond the role hierarchy.
- Example of a possible sharing rule: Share loans with status “Approved” to the Finance Team with read-only access.

## Login Access Policies

- Due to Salesforce Developer Edition and license restrictions, the “Login As” functionality is not available for users with Chatter Free licenses.
- Only users with full Salesforce licenses (Standard Users) can be logged in as by a System Administrator for testing.
- In this project, validation of record access was done through inspection of record owners and role hierarchy due to this limitation.
- Login Access Policies were reviewed to ensure compliance with Salesforce security best practices.
- Any necessary adjustments to login access policies will be planned in future project iterations or higher-tier Salesforce editions.

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## Dev Org Setup

- The LoanEase CRM project was developed in a Salesforce Developer Edition environment.
- This org acts as a standalone development and testing environment without sandbox separation.
- All schema, data, users, roles, and configurations are created and tested directly in this org.
- Developer Edition provides full access to customize objects, workflows, security settings, and Lightning apps.
- Version control, deployments, and change management are done manually as this is a single developer or small-team org.

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## Sandbox Usage

- The project was developed entirely in a Salesforce Developer Edition org.
- No Sandbox or partial-copy sandbox environments were used in this project due to limitations of the edition.
- All configurations, data modeling, and custom development were performed directly in the Developer org.
- Future enhancements or team collaboration would benefit from the use of Sandboxes for isolated development and testing.

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## Deployment Basics

- All development and configuration were done directly in the Salesforce Developer Edition org.
- No formal change sets, packages, or deployment tools were used due to single-org setup.
- Version control and deployment processes are manual; changes tracked and managed within the single org.