

LoanEase: Salesforce Loan Management CRM

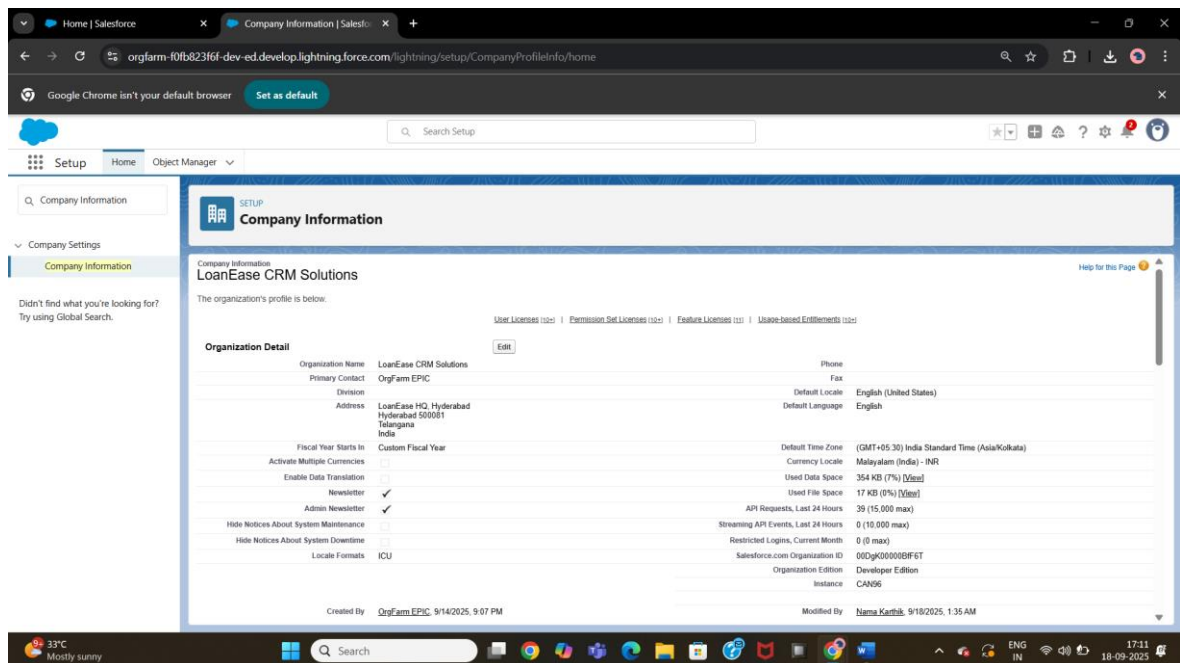
Phase 2: Org Setup & Configuration for LoanEase CRM

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

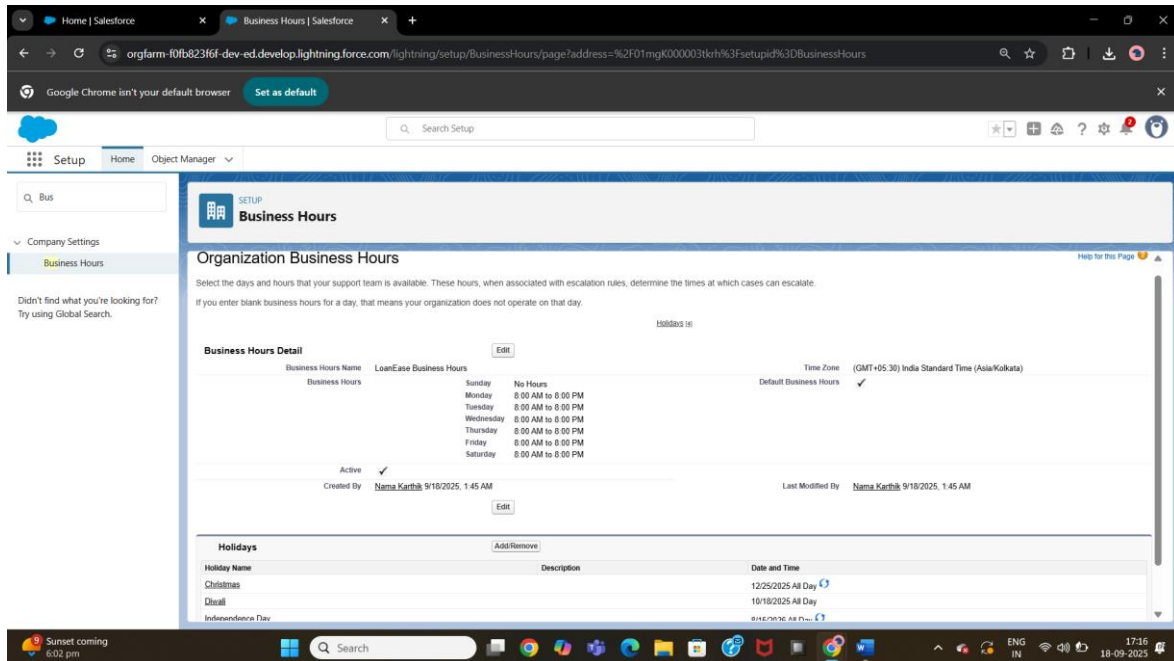
- **Org Name**– LoanEase CRM
- **Setup Configuration:**
 - **Locale:** English (India)
 - **Time Zone:** GMT+05:30 (Kolkata)
 - **Currency:** Indian Rupee (INR)
 - **Language:** English (India)



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).

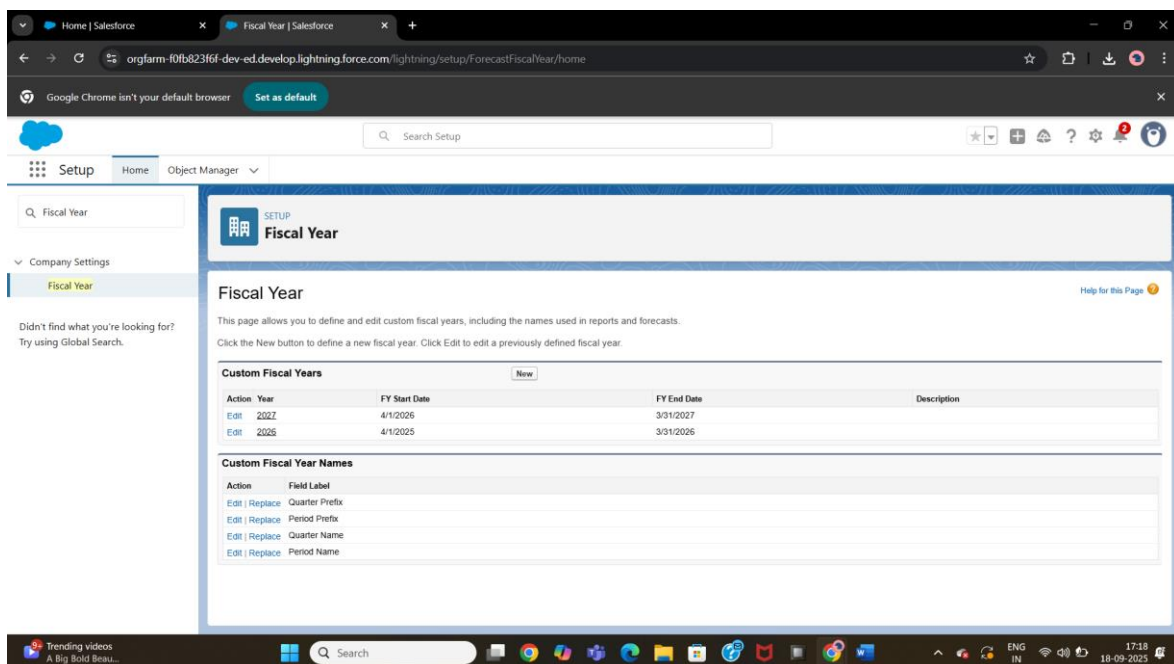
- Business hours are used for tracking service SLAs, escalation rules, and workflows.



The screenshot shows the Salesforce 'Business Hours' setup page. The page title is 'Organization Business Hours'. Below the title, there is a description: '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.' The main section is 'Business Hours Detail', which shows a table for 'LoanEase Business Hours'. The table has columns for 'Business Hours Name', 'Business Hours', 'Time Zone', and 'Default Business Hours'. The 'Business Hours' column lists days from Sunday to Saturday with their respective hours. The 'Time Zone' is set to '(GMT+05:30) India Standard Time (Asia/Kolkata)'. Below the table, there is a section for 'Holidays' with a table listing 'Holiday Name', 'Description', and 'Date and Time'. The 'Holidays' table lists 'Christmas' (12/25/2025 All Day) and 'Independence Day' (15/08/2025 All Day). The page also shows a sidebar with 'Setup' and 'Home' tabs, and a search bar.

Fiscal Year Settings

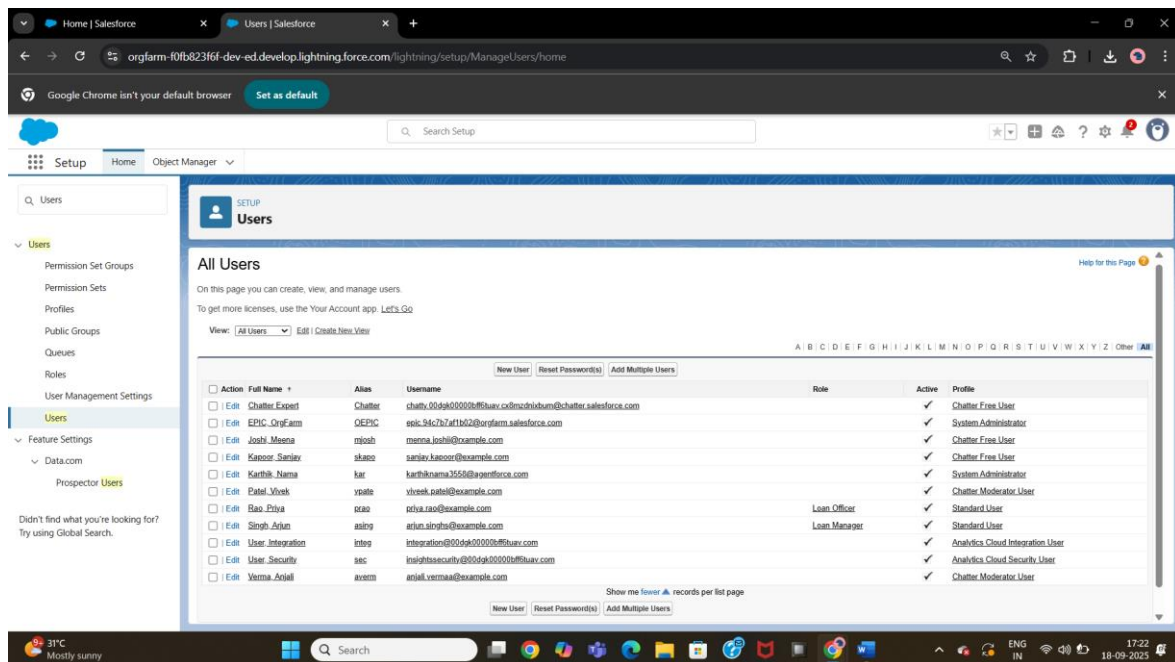
- The fiscal year for LoanEase CRM org is set as a custom fiscal year starting in April, aligning with the company's financial calendar.
- This setup supports business-specific reporting and forecasting periods.



The screenshot shows the Salesforce 'Fiscal Year' setup page. The page title is 'Fiscal Year'. Below the title, there is a description: 'This page allows you to define and edit custom fiscal years, including the names used in reports and forecasts. Click the New button to define a new fiscal year. Click Edit to edit a previously defined fiscal year.' The main section is 'Custom Fiscal Years', which shows a table with columns for 'Action', 'Year', 'FY Start Date', 'FY End Date', and 'Description'. The table lists two fiscal years: 2022 (4/1/2026 to 3/31/2027) and 2025 (4/1/2025 to 3/31/2026). Below the table, there is a section for 'Custom Fiscal Year Names' with a table listing 'Action', 'Field Label', and 'Value'. The table lists four names: 'Quarter Prefix', 'Period Prefix', 'Quarter Name', and 'Period Name'. The page also shows a sidebar with 'Setup' and 'Home' tabs, and a search bar.

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.

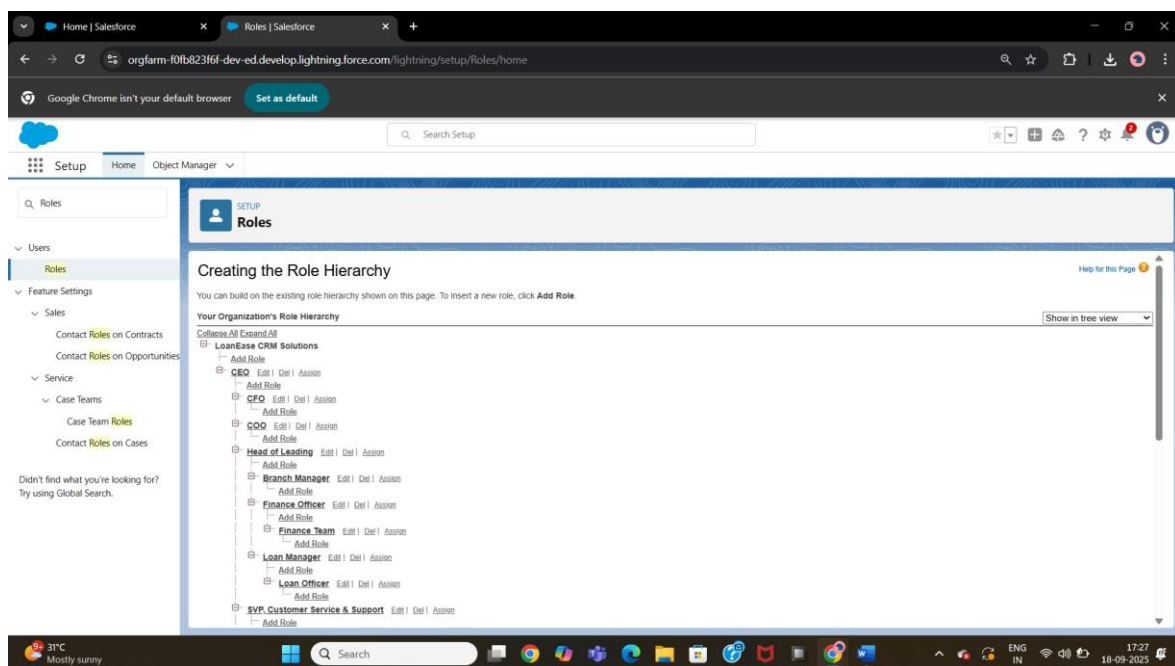


AppExchange Exploration

- 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.



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.

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.

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.