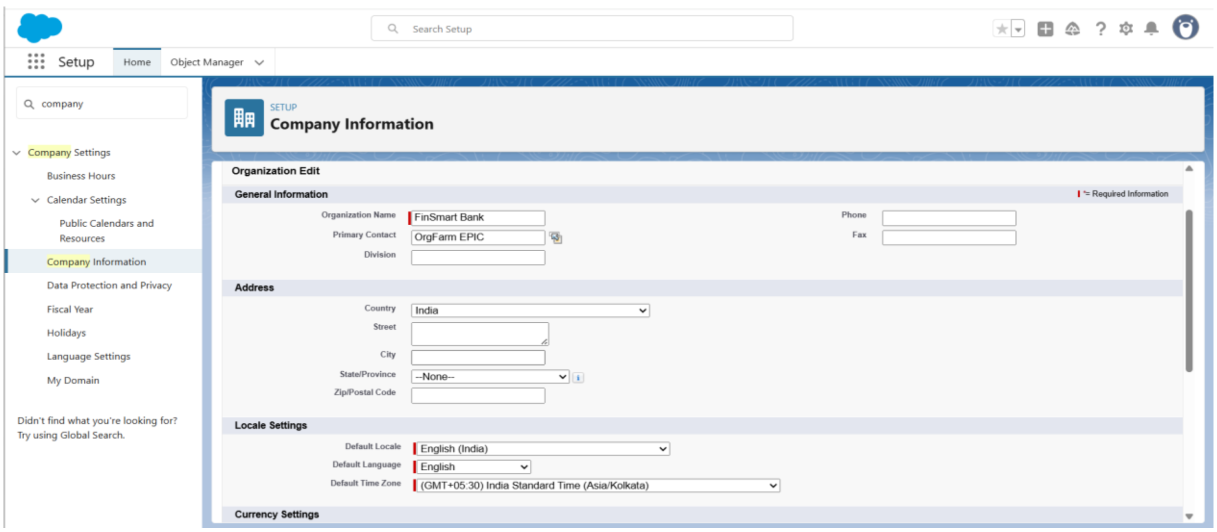
FinSmart CRM Project – Phase 2: Org Setup & Configuration

This document explains the configuration I performed in Salesforce for FinSmart Bank, along with the reasons for each decision. Screenshots are provided for reference.

1. Company Profile Setup

What I did: I configured the Company Information in Salesforce with the name 'FinSmart Bank', locale as 'English (India)', time zone as '(GMT+05:30) Kolkata', and default currency as 'INR'.

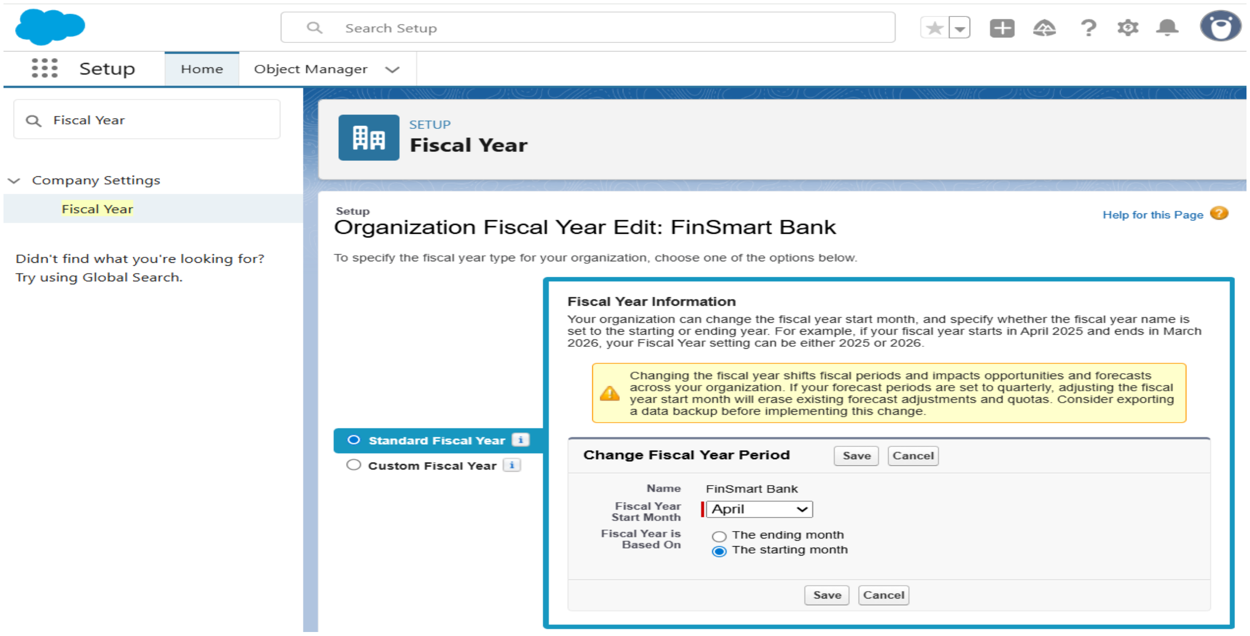
Reason: This ensures all records and transactions align with the bank's working region, and financial values are consistently reported in Indian Rupees.



2. Fiscal Year

What I did: I set up a Standard Fiscal Year starting in April.

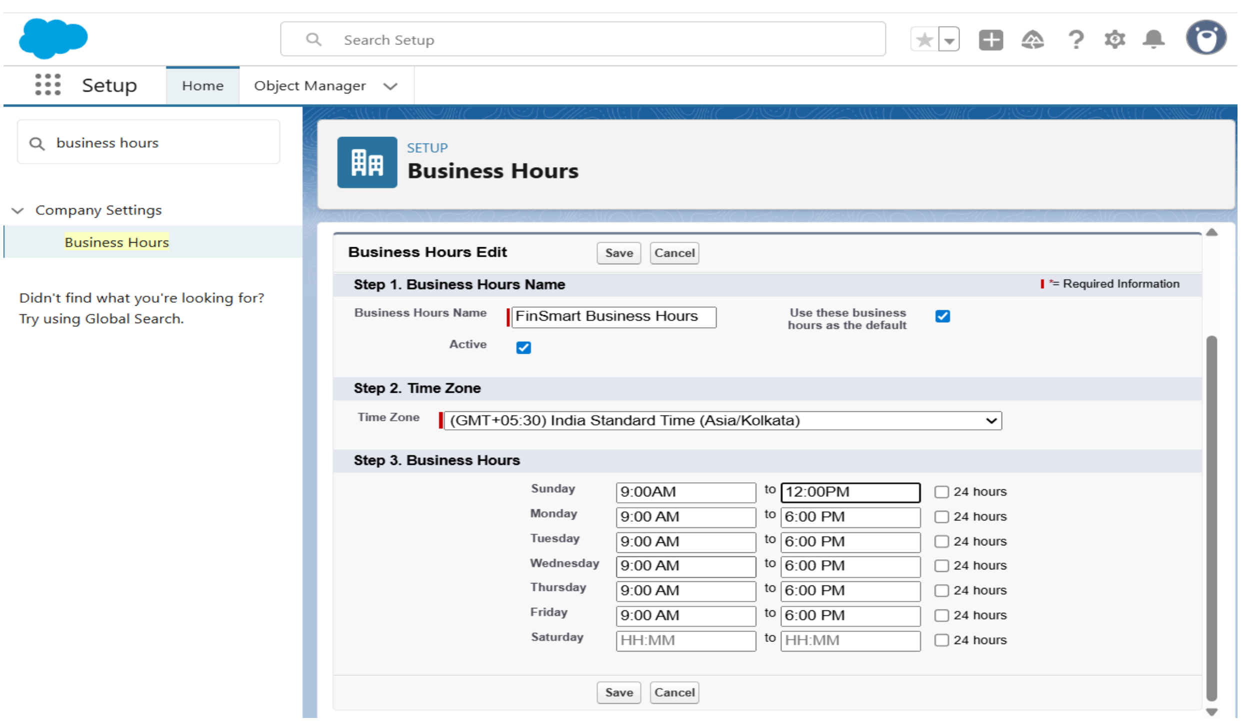
Reason: Banks in India follow the April–March financial cycle. This setup ensures reports and analytics align with regulatory and compliance needs.

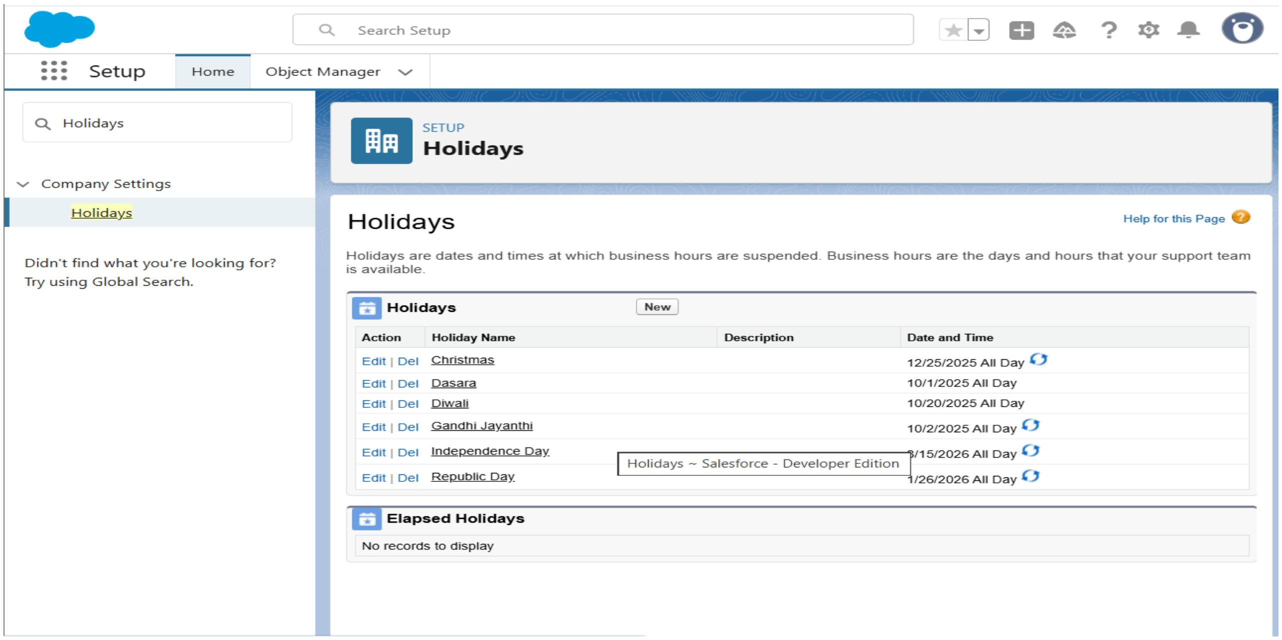


3. Business Hours & Holidays

What I did: I created business hours named 'FinSmart Business Hours' with working hours from 09:00AM to 6:00PM. I also added holidays to reflect official bank holidays.

Reason: Defining business hours ensures that service level agreements, workflows, and escalations respect actual working time. Adding holidays prevents automated tasks from running when the bank is closed.

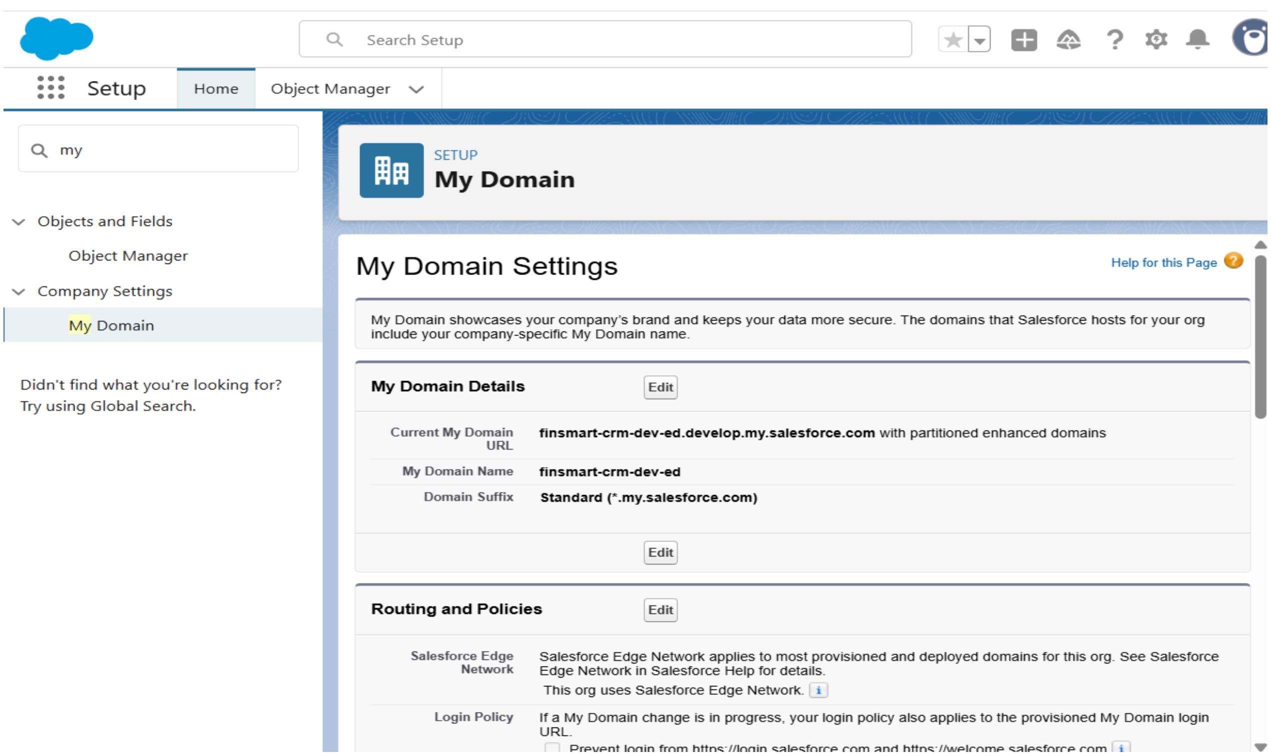




4. My Domain

What I did: I registered a unique domain name (e.g., finsmart-bank) and deployed it to users.

Reason: A My Domain is required for Lightning components, LWCs, and connected apps. It also improves branding and login security for the organization.



5. Org-Wide Defaults (OWD)

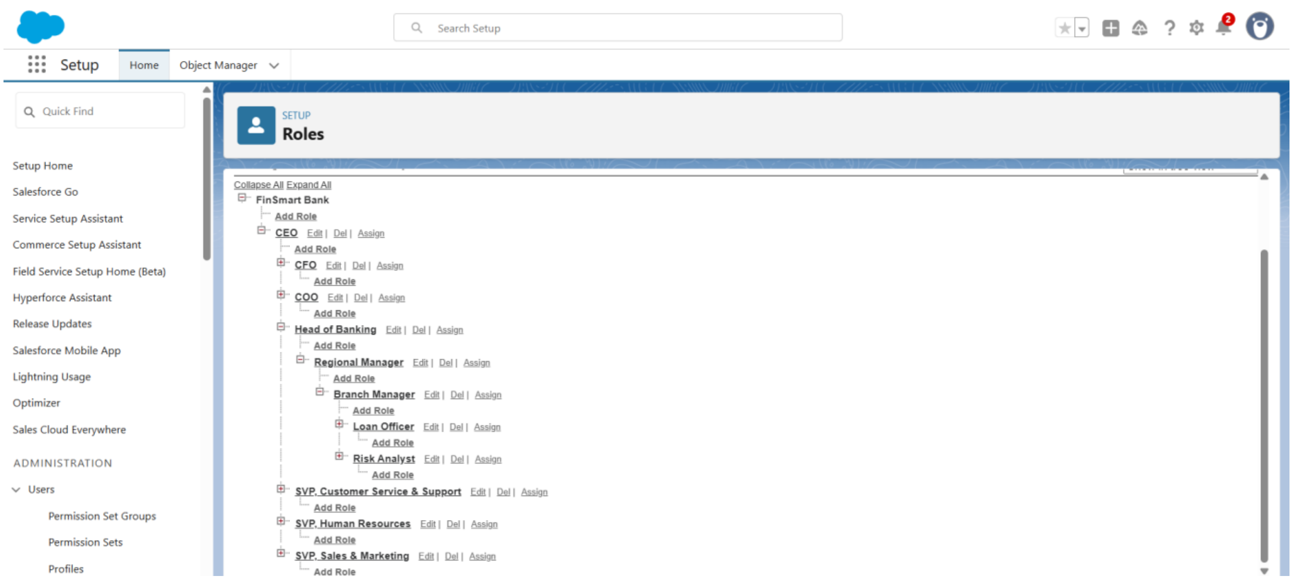
What I did: I planned OWD settings for Customer__c, Loan_Application__c, and Repayment__c as Private.

Reason: The actual configuration will be done in later stages of the project.

6. Role Hierarchy

What I did: I created a hierarchy: Head of Banking → Regional Manager → Branch Manager → (Loan Officer, Risk Analyst).

Reason: This role structure ensures proper data visibility flows upwards, allowing managers to monitor their teams while restricting unnecessary access at lower levels.

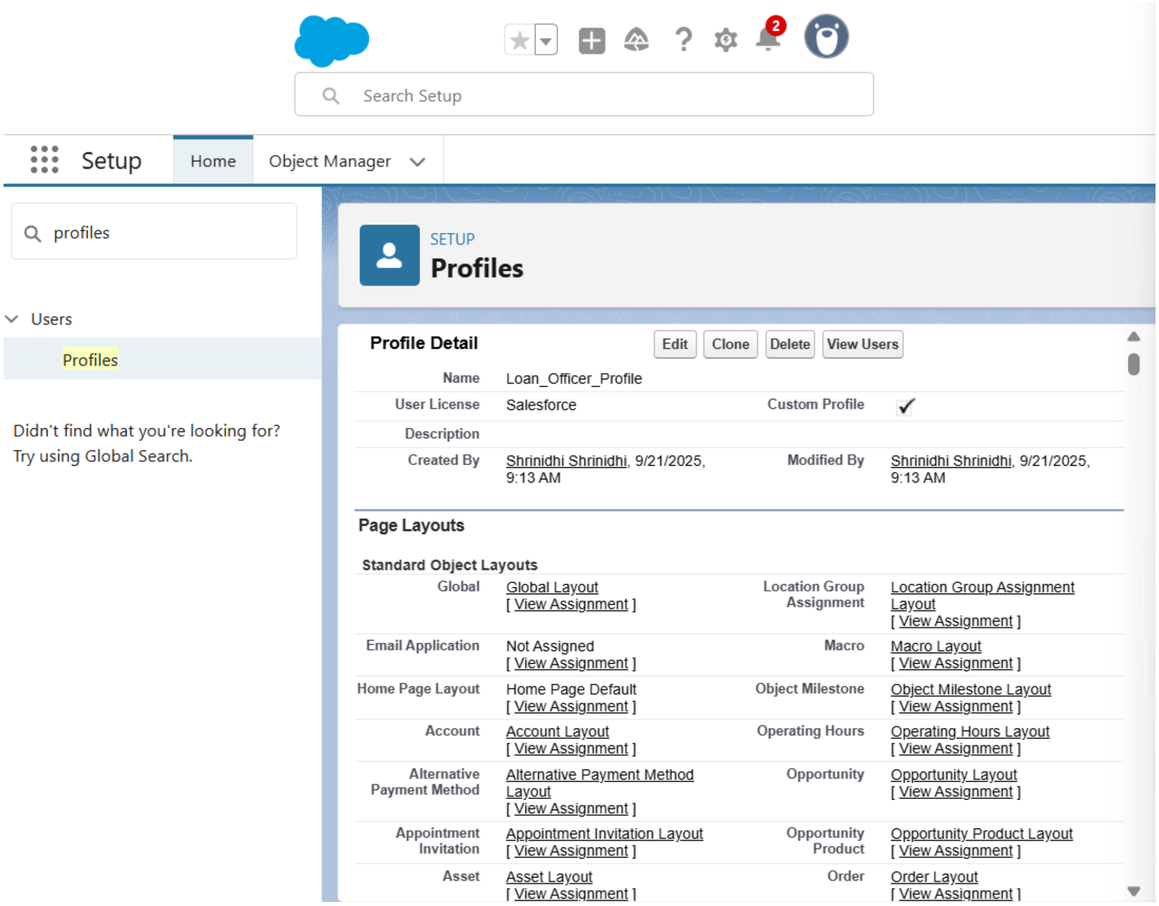


7. Profiles & Permission Sets

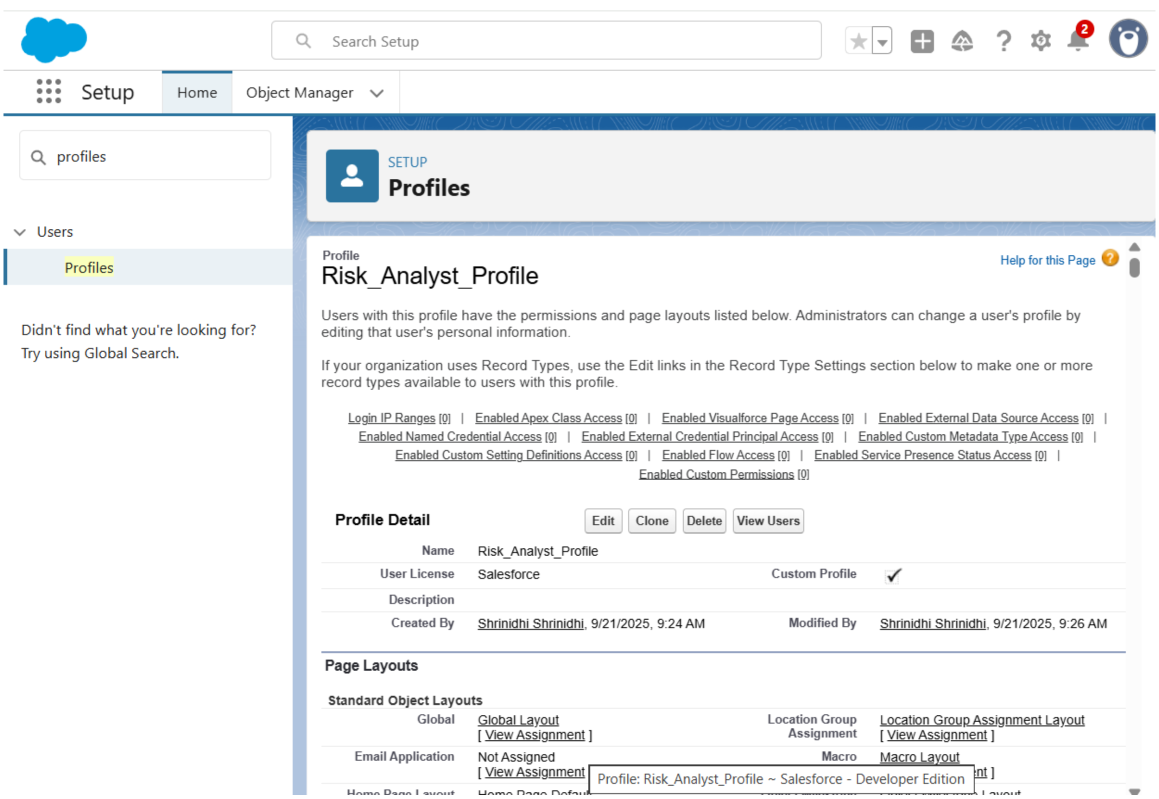
What I did: I cloned the Standard User profile to create three profiles:
- Loan_Officer_Profile – for loan officers who handle customer loan applications.
- Risk_Analyst_Profile – for risk analysts who verify documents and assess loan risk.
- Manager_Profile – for managers who oversee customers, loans, repayments, and documents.

Additionally, I planned to create a Permission Set for extra access requirements. This will be done in later phases.

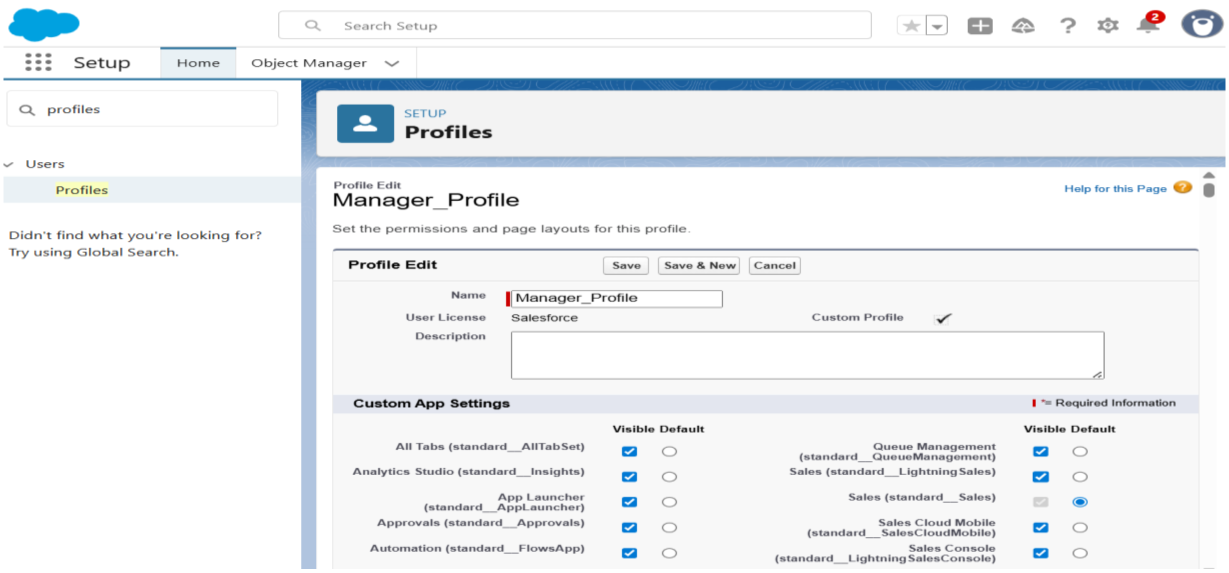
Reason: Profiles control object permissions. Custom profiles were required to match responsibilities, while Permission Sets provide flexible access extensions without changing the core profiles.



Search Setup
Setup
Home
Object Manager
profiles
Users
Profiles
Didn't find what you're looking for?
Try using Global Search.
SETUP
Profiles
Profile Detail
Edit
Clone
Delete
View Users
Name Loan_Officer_Profile
User License Salesforce
Custom Profile ✓
Description
Created By Shrinidhi Shrinidhi, 9/21/2025, 9:13 AM
Modified By Shrinidhi Shrinidhi, 9/21/2025, 9:13 AM
Page Layouts
Standard Object Layouts
Global Global Layout [View Assignment]
Location Group Assignment Location Group Assignment Layout [View Assignment]
Email Application Not Assigned [View Assignment]
Macro Macro Layout [View Assignment]
Home Page Layout Home Page Default [View Assignment]
Object Milestone Object Milestone Layout [View Assignment]
Account Account Layout [View Assignment]
Operating Hours Operating Hours Layout [View Assignment]
Alternative Payment Method Alternative Payment Method Layout [View Assignment]
Opportunity Opportunity Layout [View Assignment]
Appointment Invitation Appointment Invitation Layout [View Assignment]
Opportunity Product Opportunity Product Layout [View Assignment]
Asset Asset Layout [View Assignment]
Order Order Layout [View Assignment]



Search Setup
Setup
Home
Object Manager
profiles
Users
Profiles
Didn't find what you're looking for?
Try using Global Search.
SETUP
Profiles
Profile
Risk_Analyst_Profile
Help for this Page
Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.
If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.
Login IP Ranges [0] | Enabled Apex Class Access [0] | Enabled Visualforce Page Access [0] | Enabled External Data Source Access [0] |
Enabled Named Credential Access [0] | Enabled External Credential Principal Access [0] | Enabled Custom Metadata Type Access [0] |
Enabled Custom Setting Definitions Access [0] | Enabled Flow Access [0] | Enabled Service Presence Status Access [0] |
Enabled Custom Permissions [0]
Profile Detail
Edit
Clone
Delete
View Users
Name Risk_Analyst_Profile
User License Salesforce
Custom Profile ✓
Description
Created By Shrinidhi Shrinidhi, 9/21/2025, 9:24 AM
Modified By Shrinidhi Shrinidhi, 9/21/2025, 9:26 AM
Page Layouts
Standard Object Layouts
Global Global Layout [View Assignment]
Location Group Assignment Location Group Assignment Layout [View Assignment]
Email Application Not Assigned [View Assignment]
Macro Macro Layout
Profile: Risk_Analyst_Profile ~ Salesforce - Developer Edition



8. Users & Licenses

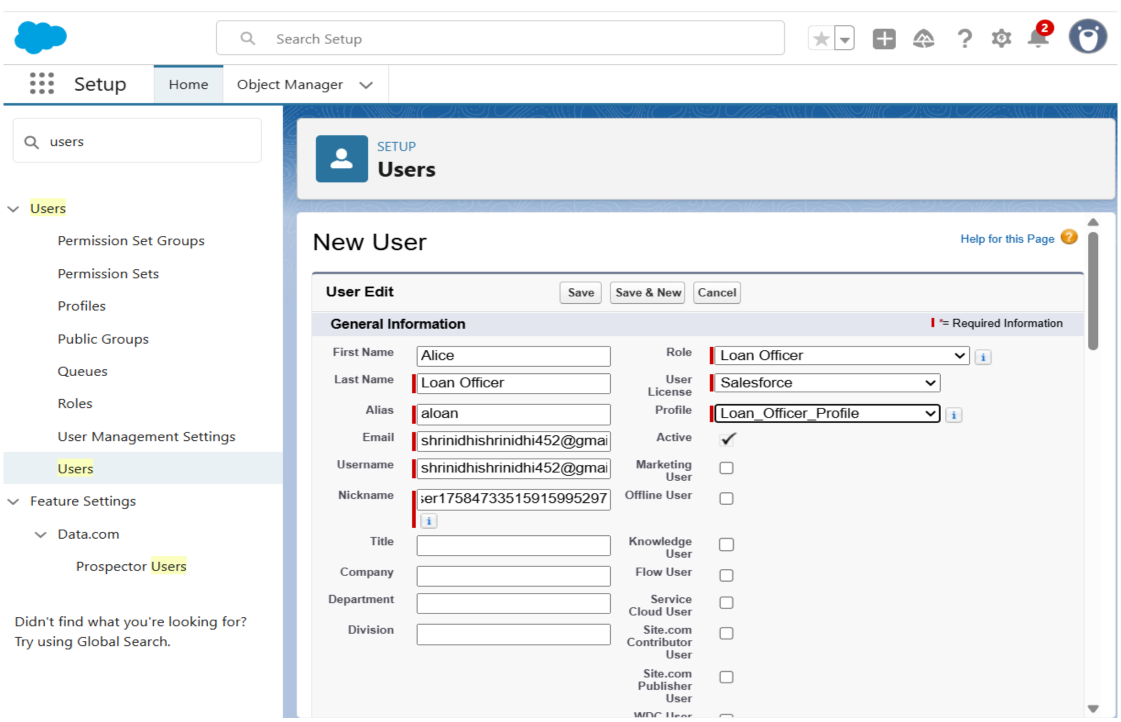
What I did: I created three test users:

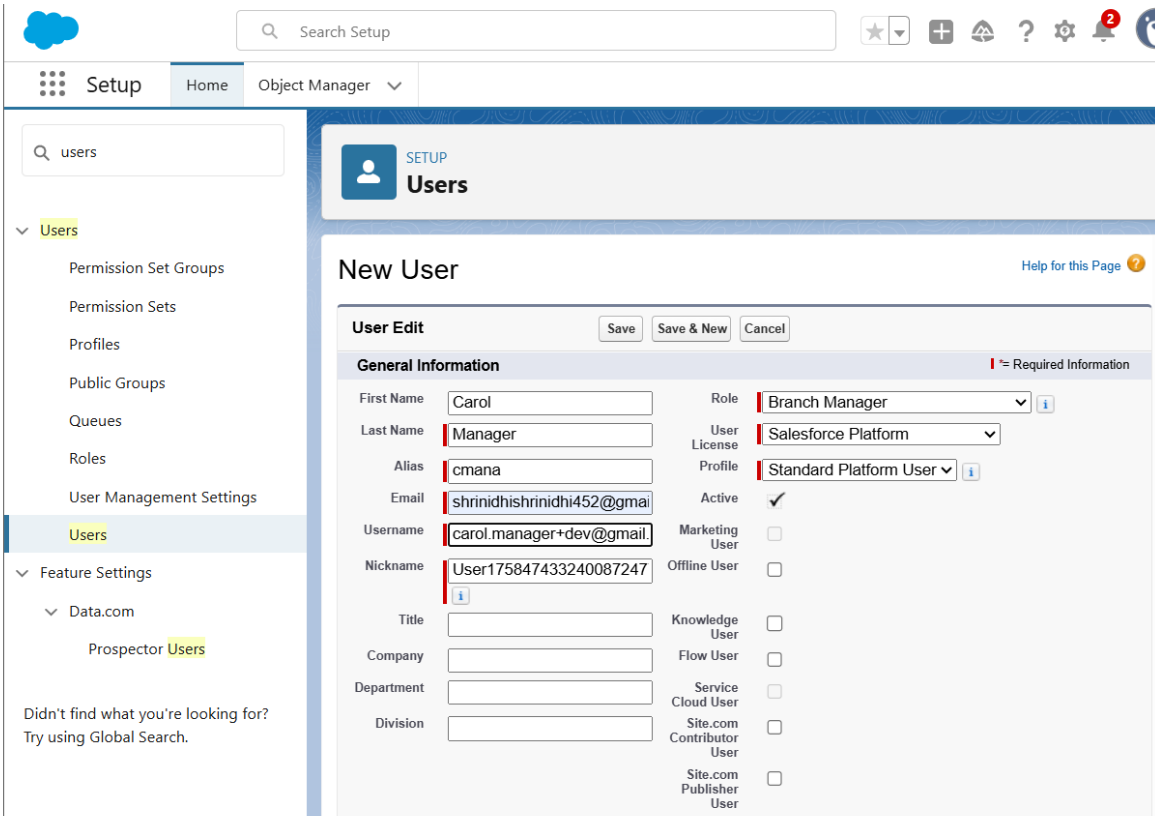
• Alice – Loan Officer with Loan_Officer_Profile.

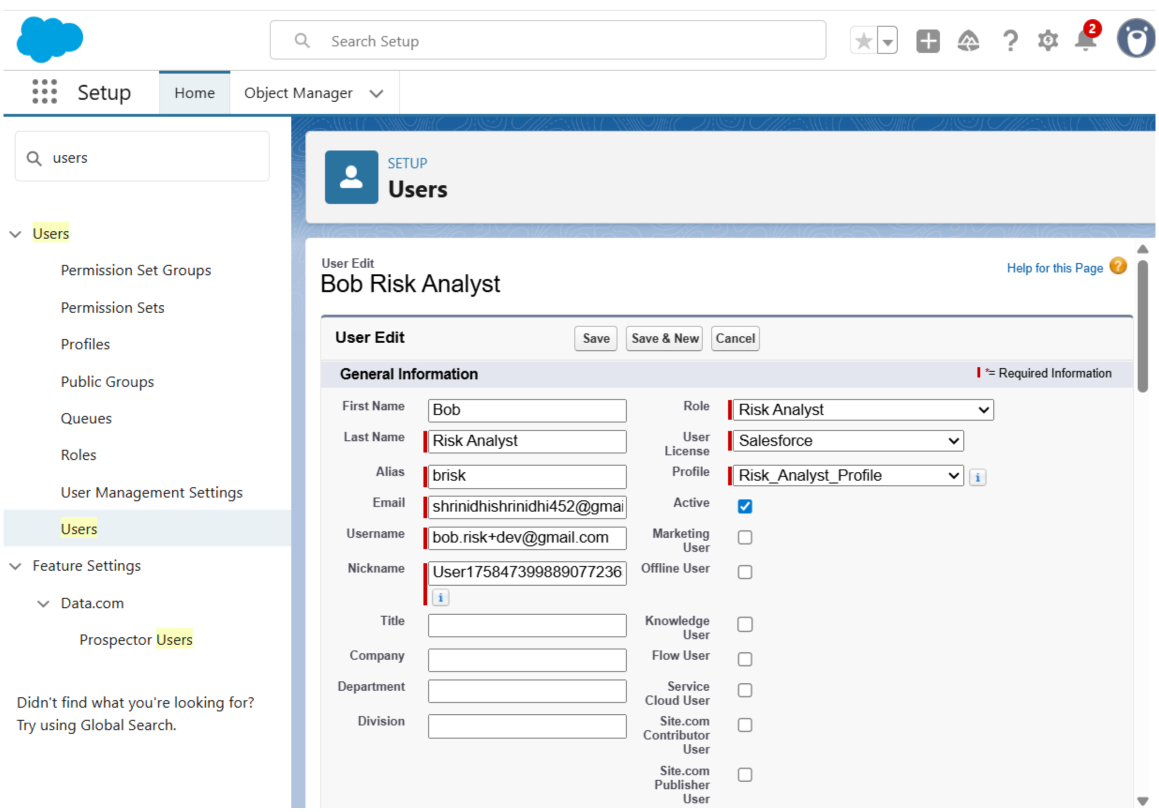
• Bob – Risk Analyst with Risk_Analyst_Profile.

• Carol – Manager with Manager_Profile.

Reason: These test users simulate different roles in the bank. They allow testing of profile permissions, role hierarchy, and data visibility to ensure proper security implementation.




Search Setup
Setup
Home
Object Manager
users
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
Didn't find what you're looking for?
Try using Global Search.
SETUP
Users
New User
Help for this Page
User Edit
Save
Save & New
Cancel
General Information
= Required Information
First Name
Carol
Last Name
Manager
Alias
cmana
Email
shrinidhishrinidhi452@gmai
Username
carol.manager+dev@gmail.
Nickname
User17584743324008724
Title
Company
Department
Division
Role
Branch Manager
User License
Salesforce Platform
Profile
Standard Platform User
Active
Marketing User
Offline User
Knowledge User
Flow User
Service Cloud User
Site.com Contributor User
Site.com Publisher User


Search Setup
Setup
Home
Object Manager
users
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
Didn't find what you're looking for?
Try using Global Search.
SETUP
Users
User Edit
Bob Risk Analyst
Help for this Page
User Edit
Save
Save & New
Cancel
General Information
= Required Information
First Name
Bob
Last Name
Risk Analyst
Alias
brisk
Email
shrinidhishrinidhi452@gmai
Username
bob.risk+dev@gmail.com
Nickname
User175847399889077236
Title
Company
Department
Division
Role
Risk Analyst
User License
Salesforce
Profile
Risk_Analyst_Profile
Active
Marketing User
Offline User
Knowledge User
Flow User
Service Cloud User
Site.com Contributor User
Site.com Publisher User

9. Field History Tracking

What I did: I enabled history tracking for key fields: Loan_Status__c, Loan_Amount__c, Assigned_To__c (Loan Applications); Payment_Status__c, Paid_Amount__c (Repayments); Verification_Status__c, Expiry_Date__c (Documents); Offer_Status__c, Interest_Rate__c (Offers).

Reason: This ensures an audit trail of critical financial and customer-related fields, supporting compliance, accountability, and transparency.

10. Remote Site Settings & Named Credentials

What I did: I added a Remote Site setting for CreditBureau_API and created a Named Credential (NamedCredential_CreditBureau).

Reason: Remote Site Settings and Named Credentials are required for secure integrations with external systems like credit bureau APIs, allowing automated credit checks during loan processing.