

# 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.

The screenshot shows the Salesforce Setup interface for 'Company Information'. The left sidebar contains a navigation menu with 'Company Settings' expanded, showing options like Business Hours, Calendar Settings, Public Calendars and Resources, Company Information (selected), Data Protection and Privacy, Fiscal Year, Holidays, Language Settings, and My Domain. The main content area is titled 'Organization Edit' and contains several sections: 'General Information' with fields for Organization Name (FinSmart Bank), Primary Contact (OrgFarm EPIC), Division, Phone, and Fax; 'Address' with fields for Country (India), Street, City, State/Province (None), and Zip/Postal Code; 'Locale Settings' with fields for Default Locale (English (India)), Default Language (English), and Default Time Zone ((GMT+05:30) India Standard Time (Asia/Kolkata)); and 'Currency Settings'.

## 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.

Setup

Home

Object Manager

Search Setup

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Q Fiscal Year

Company Settings

Fiscal Year

Didn't find what you're looking for?

Try using Global Search.

SETUP

Fiscal Year

Setup

Organization Fiscal Year Edit: FinSmart Bank

Help for this Page

To specify the fiscal year type for your organization, choose one of the options below.

Fiscal Year Information

Your organization can change the fiscal year start month, and specify whether the fiscal year name is set to the starting or ending year. For example, if your fiscal year starts in April 2025 and ends in March 2026, your Fiscal Year setting can be either 2025 or 2026.

Changing the fiscal year shifts fiscal periods and impacts opportunities and forecasts across your organization. If your forecast periods are set to quarterly, adjusting the fiscal year start month will erase existing forecast adjustments and quotas. Consider exporting a data backup before implementing this change.

Standard Fiscal Year

Custom Fiscal Year

Change Fiscal Year Period

Name

FinSmart Bank

Fiscal Year Start Month

April

Fiscal Year is Based On

The ending month

The starting month

Save

Cancel

### 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.

Setup

Home

Object Manager

Search Setup

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Q business hours

Company Settings

Business Hours

Didn't find what you're looking for?

Try using Global Search.

SETUP

Business Hours

Business Hours Edit

Save

Cancel

Step 1. Business Hours Name

Business Hours Name

FinSmart Business Hours

Use these business hours as the default

Active

Step 2. Time Zone

Time Zone

(GMT+05:30) India Standard Time (Asia/Kolkata)

Step 3. Business Hours

Sunday

9:00AM

to

12:00PM

24 hours

Monday

9:00 AM

to

6:00 PM

24 hours

Tuesday

9:00 AM

to

6:00 PM

24 hours

Wednesday

9:00 AM

to

6:00 PM

24 hours

Thursday

9:00 AM

to

6:00 PM

24 hours

Friday

9:00 AM

to

6:00 PM

24 hours

Saturday

HH:MM

to

HH:MM

24 hours

Save

Cancel

**Holidays**

Holidays are dates and times at which business hours are suspended. Business hours are the days and hours that your support team is available.

| Action                                     | Holiday Name     | Description                               | Date and Time      |
|--|------------------|---|--------------------|
| <a href="#">Edit</a>   <a href="#">Del</a> | Christmas        |   | 12/25/2025 All Day |
| <a href="#">Edit</a>   <a href="#">Del</a> | Dasara           |   | 10/1/2025 All Day  |
| <a href="#">Edit</a>   <a href="#">Del</a> | Diwali           |   | 10/20/2025 All Day |
| <a href="#">Edit</a>   <a href="#">Del</a> | Gandhi Jayanthi  |   | 10/2/2025 All Day  |
| <a href="#">Edit</a>   <a href="#">Del</a> | Independence Day |   | 7/15/2026 All Day  |
| <a href="#">Edit</a>   <a href="#">Del</a> | Republic Day     | Holidays ~ Salesforce - Developer Edition | 1/26/2026 All Day  |

**Elapsed Holidays**  
No records to display

## 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.

**My Domain Settings**

My Domain showcases your company's brand and keeps your data more secure. The domains that Salesforce hosts for your org include your company-specific My Domain name.

**My Domain Details**

|                       |   |
|-----------------------|---|
| Current My Domain URL | finsmart-crm-dev-ed.develop.my.salesforce.com with partitioned enhanced domains |
| My Domain Name        | finsmart-crm-dev-ed   |
| Domain Suffix         | Standard (*.my.salesforce.com)  |

**Routing and Policies**

|                         |  |
|-------------------------|--|
| Salesforce Edge Network | Salesforce Edge Network applies to most provisioned and deployed domains for this org. See Salesforce Edge Network in Salesforce Help for details. This org uses Salesforce Edge Network.  |
| Login Policy            | If a My Domain change is in progress, your login policy also applies to the provisioned My Domain login URL. <ul style="list-style-type: none"> <li><input type="checkbox"/> Prevent login from https://login.salesforce.com and https://welcome.salesforce.com</li> </ul> |

## 5. Org-Wide Defaults (OWD)

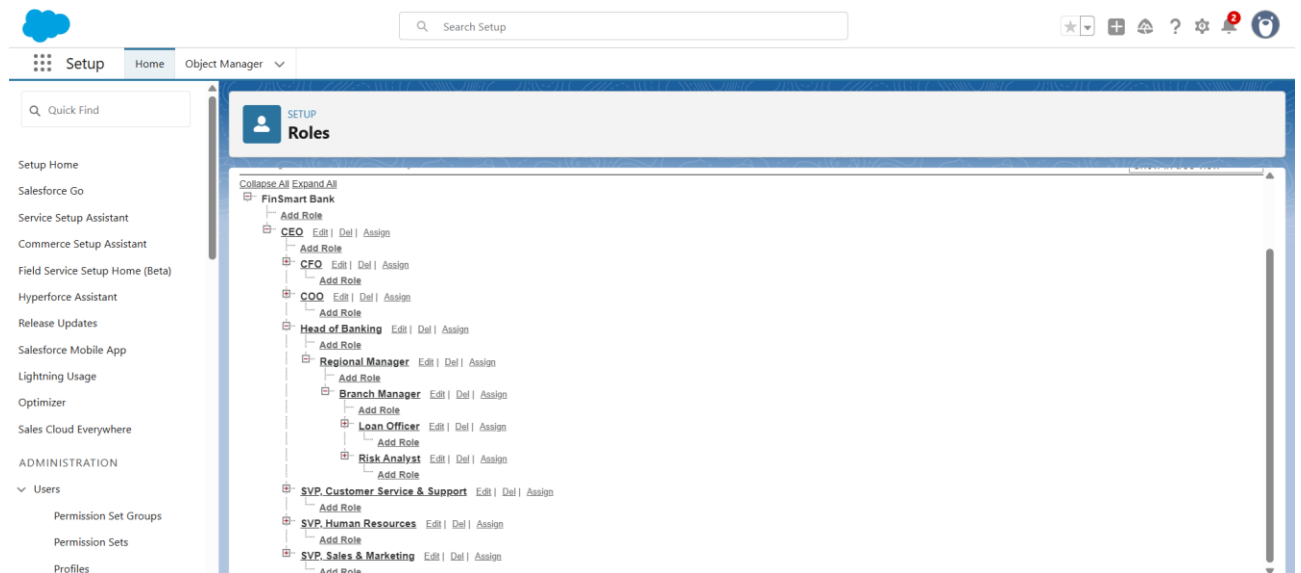
What I did: I planned OWD settings for Customer\_\_c, Loan\_Application\_\_c, and Repayment\_\_c as Private.

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 | <input checked="" type="checkbox"/>     |
| 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                     | <a href="#">Global Layout</a><br>[ View Assignment ]                     | Location Group Assignment | <a href="#">Location Group Assignment Layout</a><br>[ View Assignment ] |
| Email Application          | Not Assigned<br>[ View Assignment ]                                      | Macro                     | <a href="#">Macro Layout</a><br>[ View Assignment ]                     |
| Home Page Layout           | Home Page Default<br>[ View Assignment ]                                 | Object Milestone          | <a href="#">Object Milestone Layout</a><br>[ View Assignment ]          |
| Account                    | <a href="#">Account Layout</a><br>[ View Assignment ]                    | Operating Hours           | <a href="#">Operating Hours Layout</a><br>[ View Assignment ]           |
| Alternative Payment Method | <a href="#">Alternative Payment Method Layout</a><br>[ View Assignment ] | Opportunity               | <a href="#">Opportunity Layout</a><br>[ View Assignment ]               |
| Appointment Invitation     | <a href="#">Appointment Invitation Layout</a><br>[ View Assignment ]     | Opportunity Product       | <a href="#">Opportunity Product Layout</a><br>[ View Assignment ]       |
| Asset                      | <a href="#">Asset Layout</a><br>[ View Assignment ]                      | Order                     | <a href="#">Order Layout</a><br>[ 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

Help for this Page

Risk\_Analyst\_Profile

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

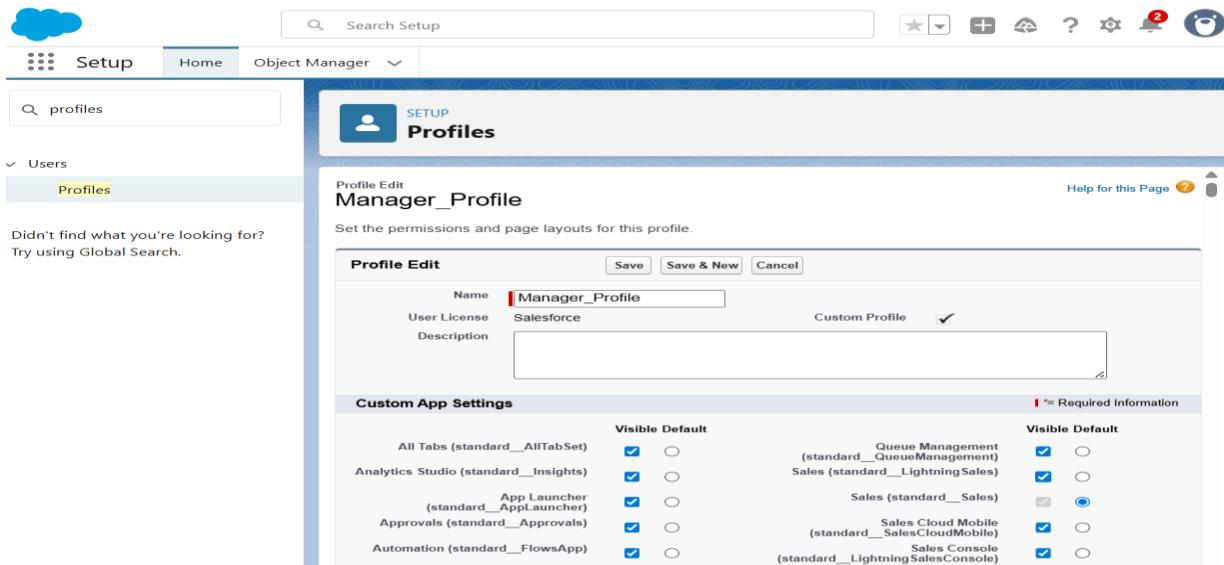
View Users

|              |   |                |   |
|--------------|---|----------------|---|
| Name         | Risk_Analyst_Profile                    |                |   |
| User License | Salesforce                              | Custom Profile | <input checked="" type="checkbox"/>     |
| 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            | <a href="#">Global Layout</a><br>[ View Assignment ] | Location Group Assignment | <a href="#">Location Group Assignment Layout</a><br>[ View Assignment ] |
| Email Application | Not Assigned<br>[ View Assignment ]                  | Macro                     | <a href="#">Macro Layout</a><br>[ View Assignment ]                     |
| Home Page Layout  | Home Page Default<br>[ View Assignment ]             | Opportunity Product       | <a href="#">Opportunity Product Layout</a><br>[ View Assignment ]       |



The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The left sidebar contains a search bar with 'profiles' and a list of navigation items: Users, Profiles (highlighted), and a search prompt. The main content area is titled 'SETUP Profiles' and 'Profile Edit Manager\_Profile'. It includes a 'Name' field with 'Manager\_Profile', a 'User License' dropdown set to 'Salesforce', and a 'Custom Profile' checkbox checked. Below this is a 'Custom App Settings' table with columns for 'Visible Default' and 'Required Information'. The table lists various standard Salesforce apps and their settings for the 'Manager\_Profile'.

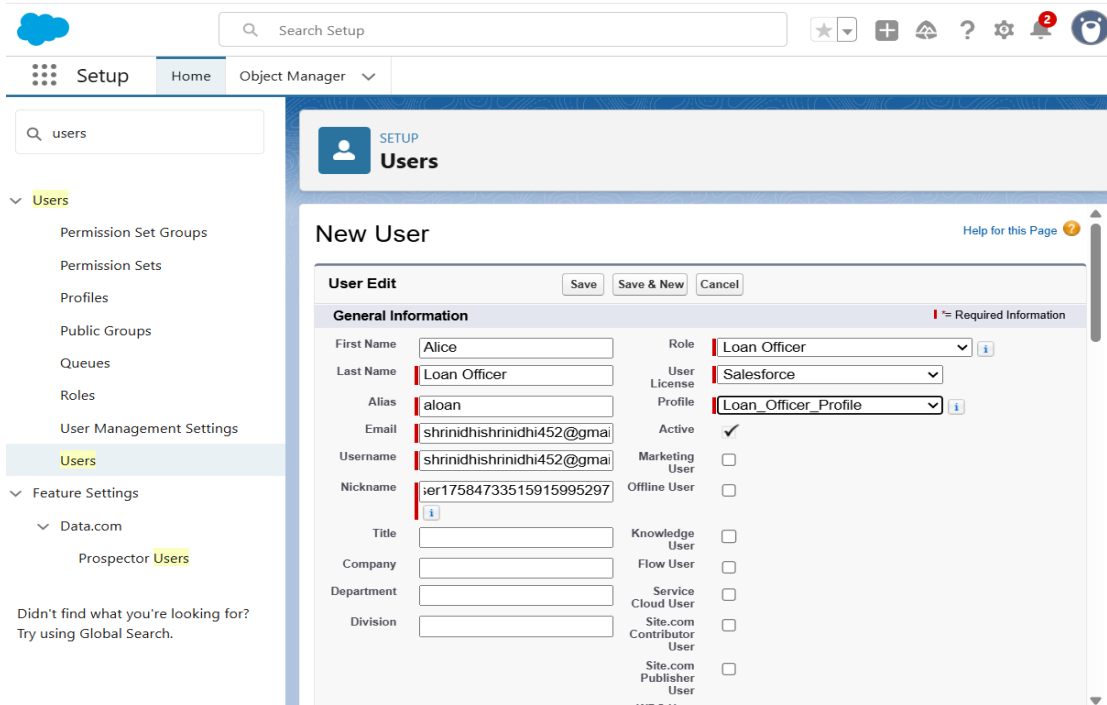
| App   | Visible Default                     | Required Information                |
|---|-------------------------------------|-------------------------------------|
| All Tabs (standard__AllTabSet)                  | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| Analytics Studio (standard__Insights)           | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| App Launcher (standard__AppLauncher)            | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| Approvals (standard__Approvals)                 | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| Automation (standard__FlowsApp)                 | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| Queue Management (standard__QueueManagement)    | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| Sales (standard__LightningSales)                | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| Sales (standard__Sales)                         | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |
| Sales Cloud Mobile (standard__SalesCloudMobile) | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| Sales Console (standard__LightningSalesConsole) | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |

## 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.



The screenshot shows the Salesforce Setup interface with the 'Users' page selected. The left sidebar contains a search bar with 'users' and a list of navigation items: Users (highlighted), Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Feature Settings. The main content area is titled 'SETUP Users' and 'New User'. It includes a 'User Edit' form with a 'General Information' section. The form contains fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. It also includes a 'Role' dropdown set to 'Loan Officer', a 'User License' dropdown set to 'Salesforce', and a 'Profile' dropdown set to 'Loan\_Officer\_Profile'. There are checkboxes for 'Active', 'Marketing User', 'Offline User', 'Knowledge User', 'Flow User', 'Service Cloud User', 'Site.com Contributor User', 'Site.com Publisher User', and 'WDC User'.

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.

Search Setup

Star

Plus

Shield

Help

Settings

2

Profile

SETUP

Users

New User

Help for this Page

User Edit

Save

Save & New

Cancel

General Information

Required Information

First Name

Carol

Role

Branch Manager

Last Name

Manager

User License

Salesforce Platform

Alias

cmama

Profile

Standard Platform User

Email

shrinidhishrinidhi452@gmail

Active

Marketing User

Username

carol.manager+dev@gmail

Offline User

Nickname

User175847433240087247

Title

Knowledge User

Company

Flow User

Department

Service Cloud User

Division

Site.com Contributor User

Site.com Publisher User

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.

Search Setup

Star

Plus

Shield

Help

Settings

2

Profile

SETUP

Users

User Edit

Help for this Page

Bob Risk Analyst

User Edit

Save

Save & New

Cancel

General Information

Required Information

First Name

Bob

Role

Risk Analyst

Last Name

Risk Analyst

User License

Salesforce

Alias

brisk

Profile

Risk\_Analyst\_Profile

Email

shrinidhishrinidhi452@gmail

Active

Marketing User

Username

bob.risk+dev@gmail.com

Offline User

Nickname

User175847399889077236

Title

Knowledge User

Company

Flow User

Department

Service Cloud User

Division

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.



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Setup

Home

Object Manager

Custom Code

Remote Access

Security

Remote Site Settings

Didn't find what you're looking for?  
Try using Global Search.

SETUP

Remote Site Settings

Remote Site Edit

Help for this Page

Enter the URL for the remote site. All s-controls, JavaScript OnClick commands in custom buttons, Apex, and AJAX proxy calls can access this Web address from salesforce.com.

Remote Site Edit

Save

Save & New

Cancel

Remote Site Name

CreditBureau\_API

Remote Site URL

https://api.creditbureau.example

Disable Protocol Security

☐

i

Description

Placeholder for Credit Bureau API integration

Active

☒

Save

Save & New

Cancel