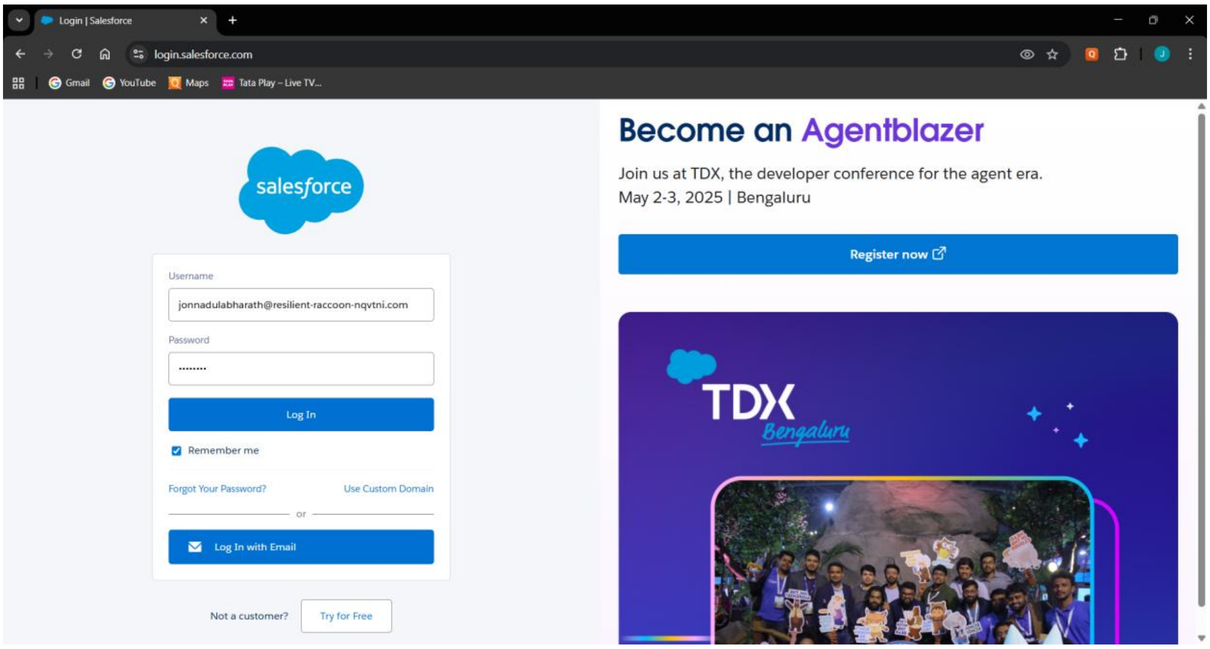
Phase 2: Org Setup & Configuration

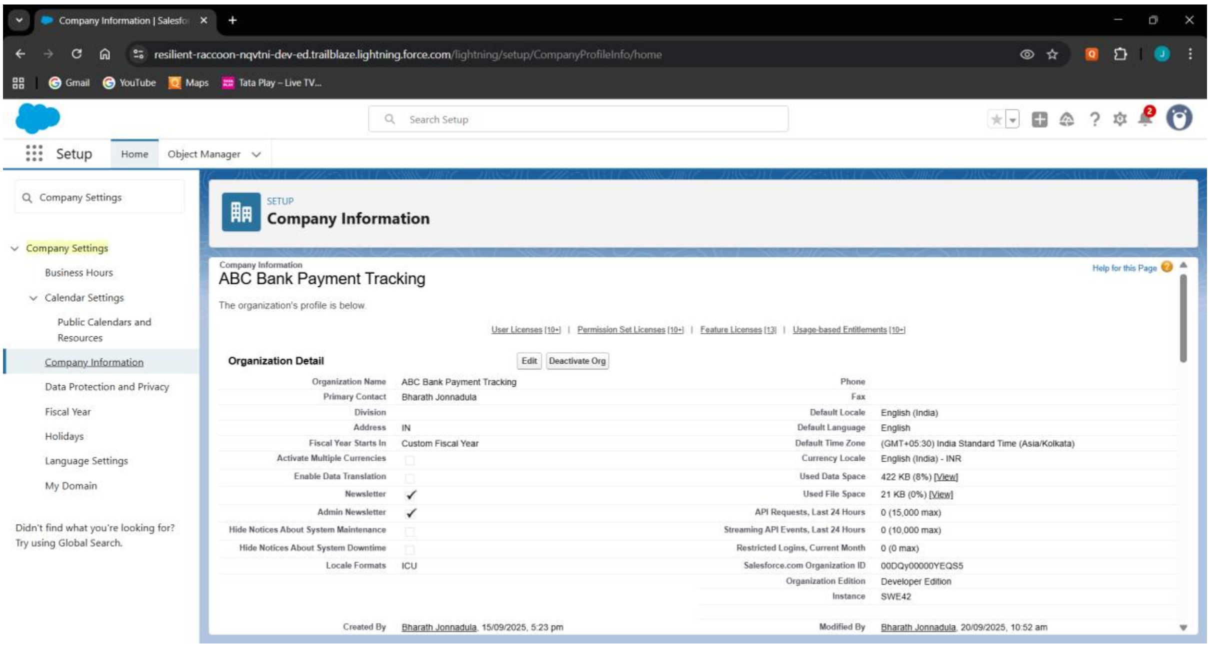
Salesforce Editions

- Use Developer Edition for initial development and testing.
- Plan for Enterprise Edition for production banking workflows.



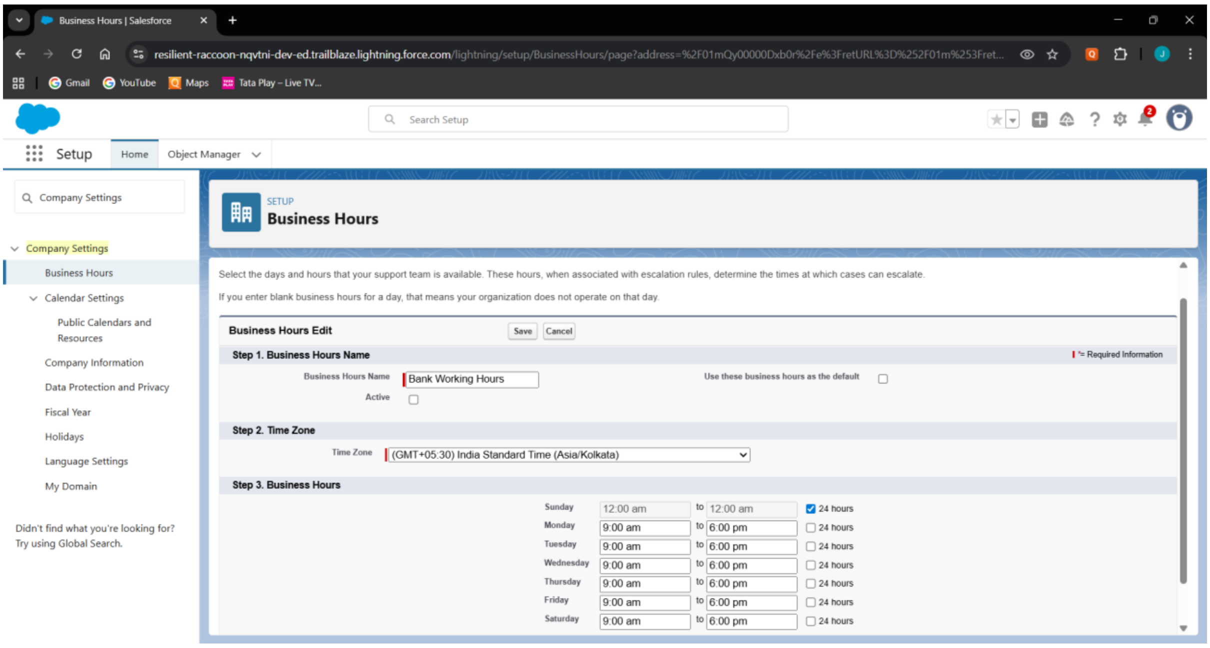
Company Profile Setup

- Set Company Name, Currency (INR/USD), and Time Zone.
- Configure organization-wide defaults.



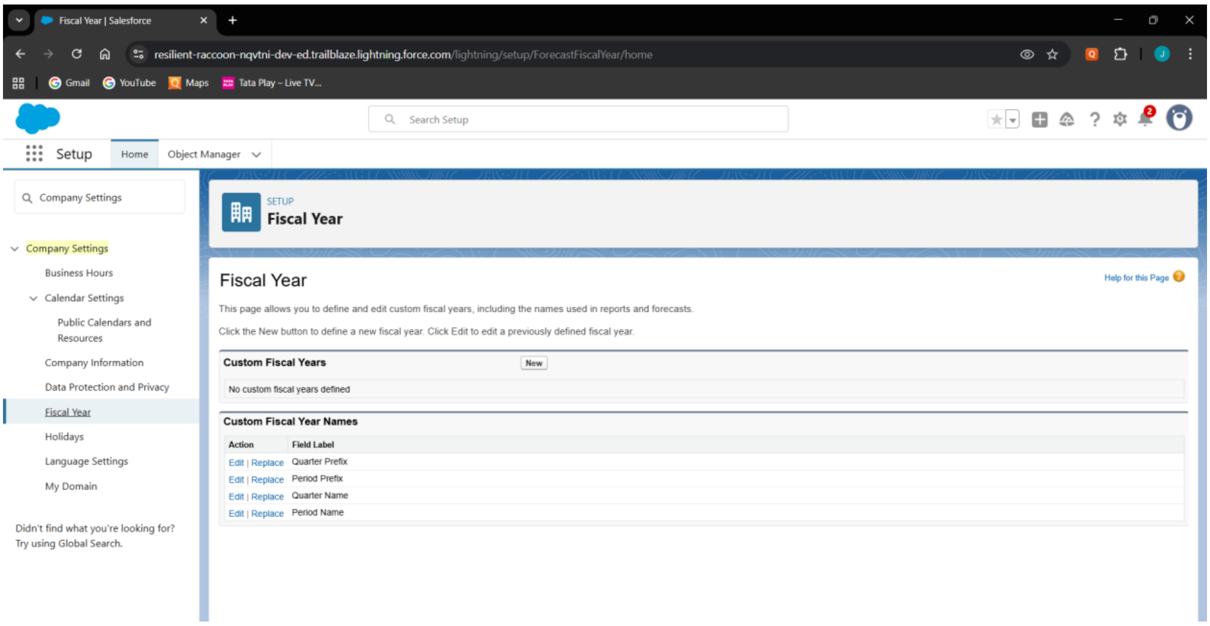
Business Hours & Holidays

- Define working hours (e.g., Mon–Sat, 9 AM–6 PM).
- Add holidays like Independence Day and Diwali.



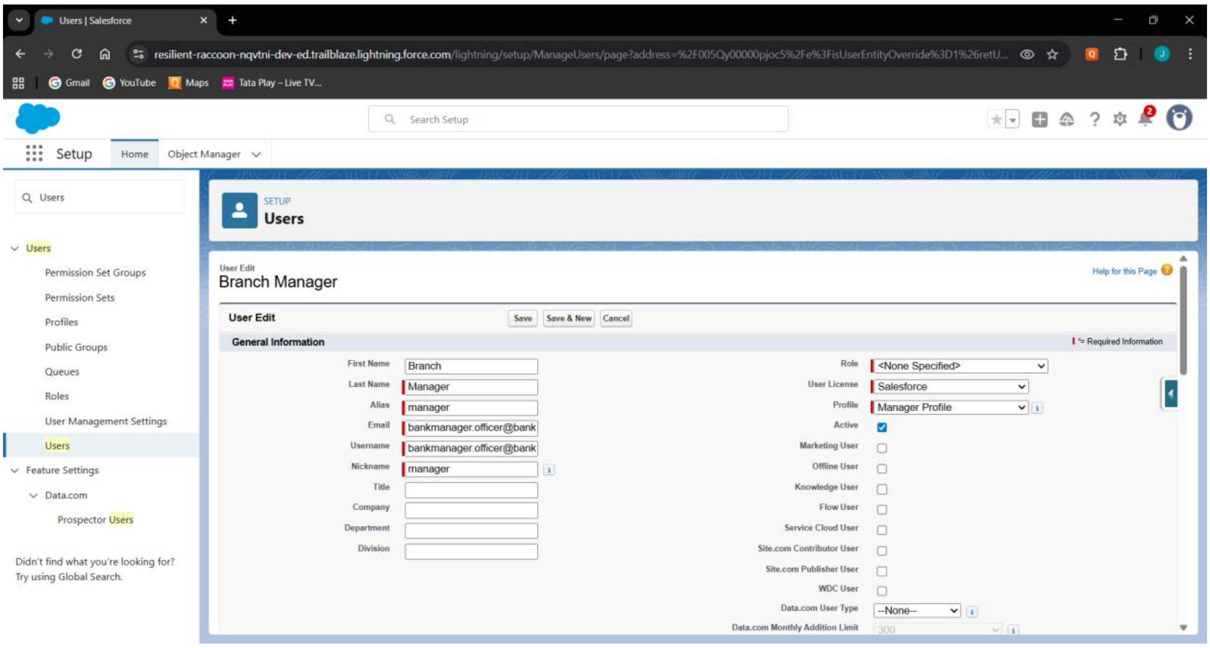
Fiscal Year Settings

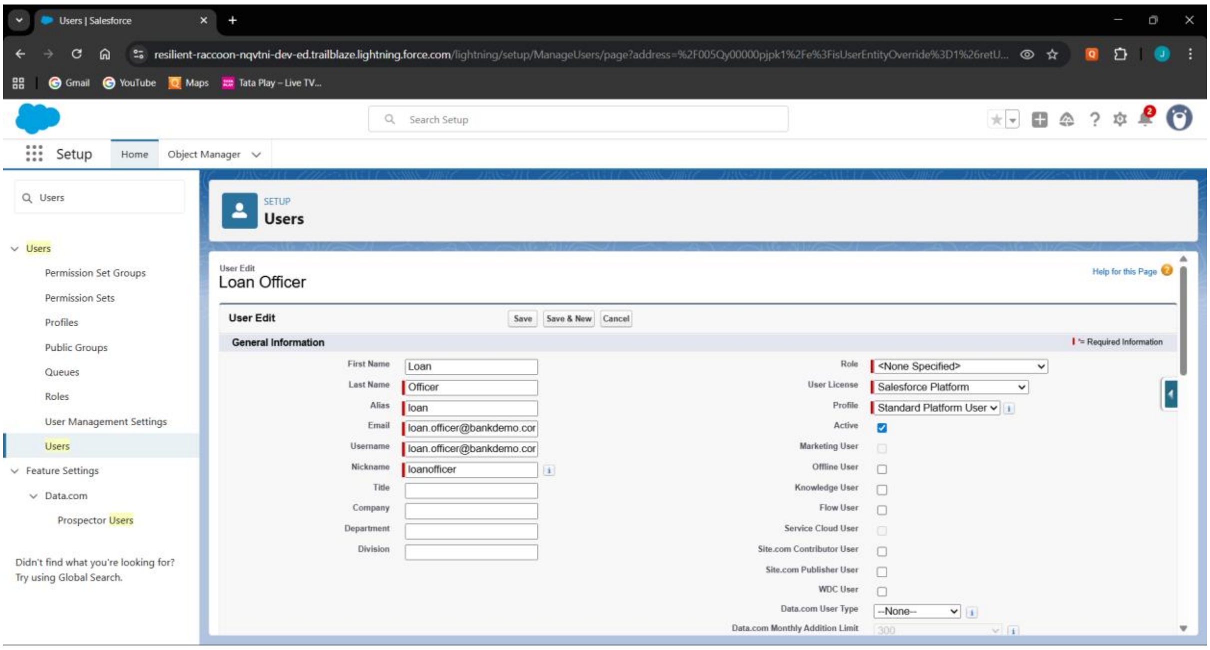
- Use standard Jan–Dec fiscal year or custom if needed.
- Align with financial reporting requirements.

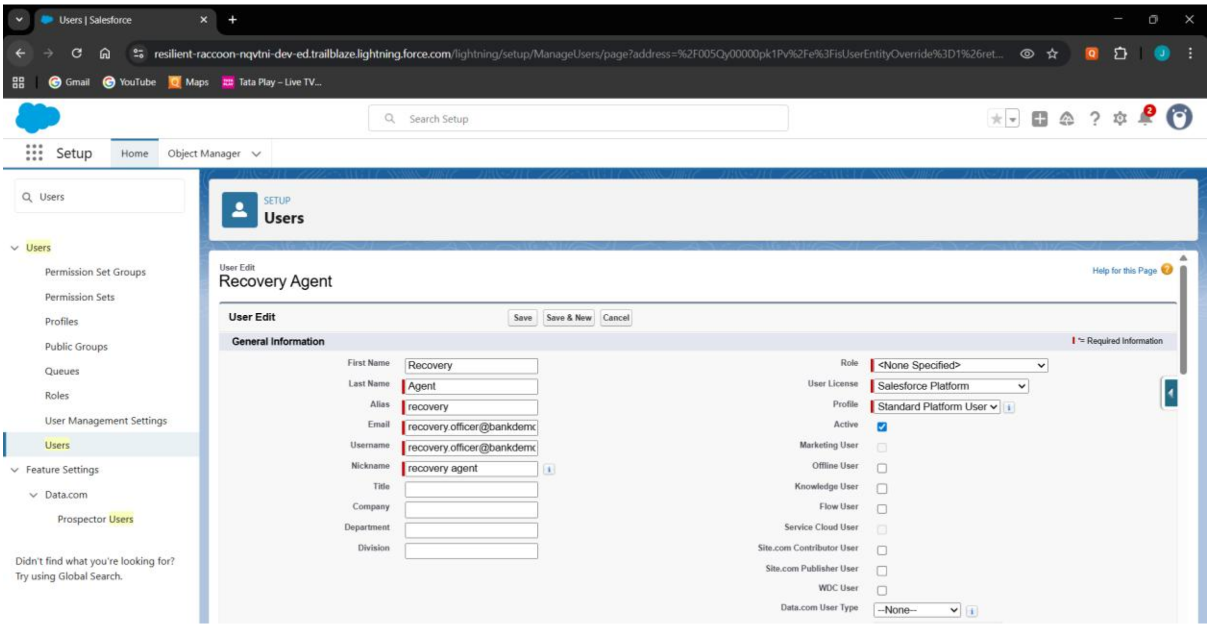


User Setup & Licenses

- Create Loan Officer, Recovery Agent, and Manager users.
- Assign appropriate licenses (Salesforce / Salesforce Platform).

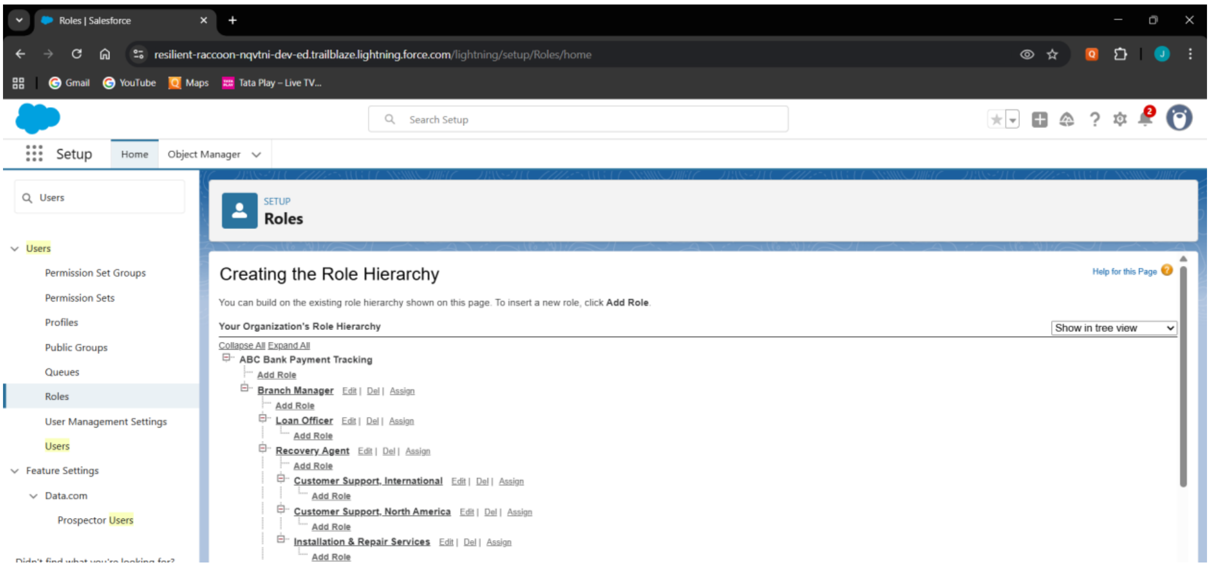






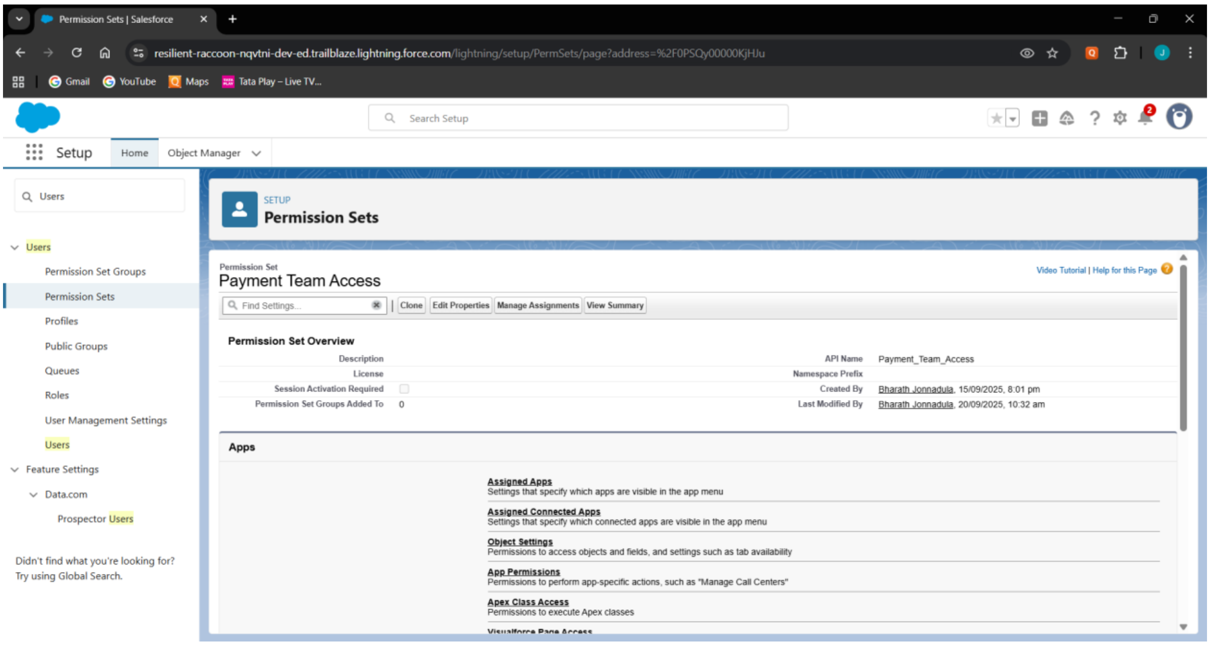
Profiles & Roles

- Create custom profiles (Loan Officer, Manager, Recovery Agent).
- Establish role hierarchy (Manager → Loan Officer / Recovery Agent).



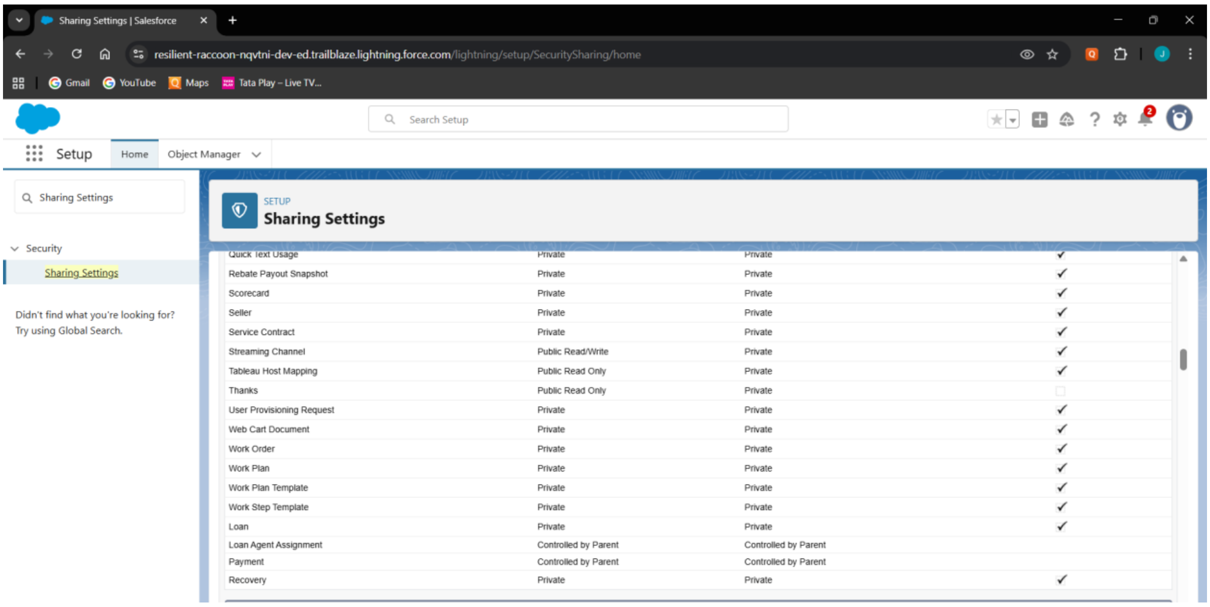
Permission Sets

- Create a Permission Set for payment tracking access.
- Assign Permission Set to Loan Officers and Managers.



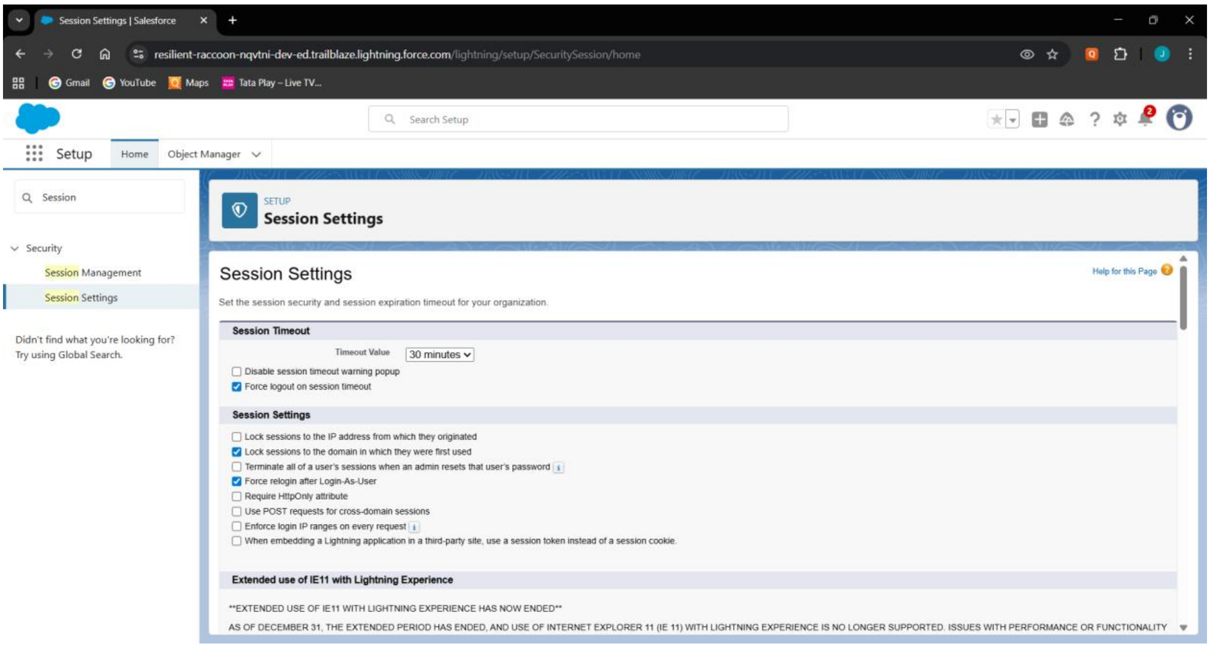
OWD & Sharing Rules

- Set custom objects (Loan, Payment, Recovery) to Private.
- Create rules to share overdue records with Recovery Agents.



Login Access Policies

- Set session timeout to 30 minutes.
- Enable login hours (8 AM–8 PM) for users.



Dev Org & Sandbox Usage

- Use Developer Org for development and testing.
- Plan sandbox usage for production-like testing later.

Deployment Basics

- Use SFDX commands to push/pull metadata.
- Prepare for deployment via Change Sets or SFDX when ready.