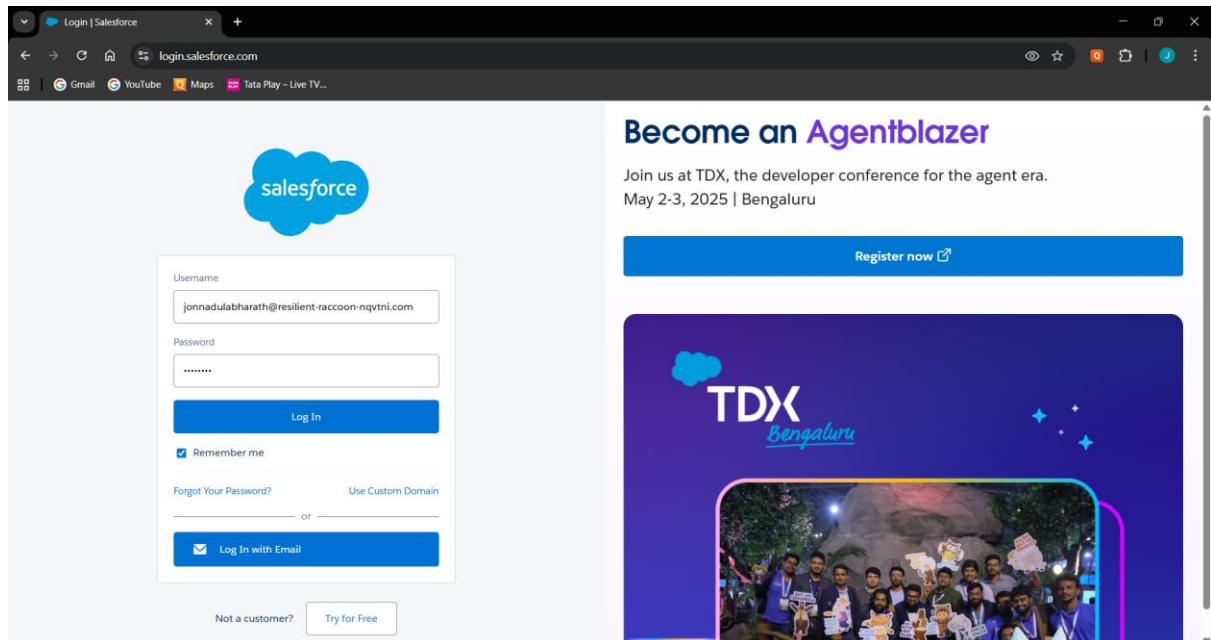


Phase 2: Org Setup & Configuration

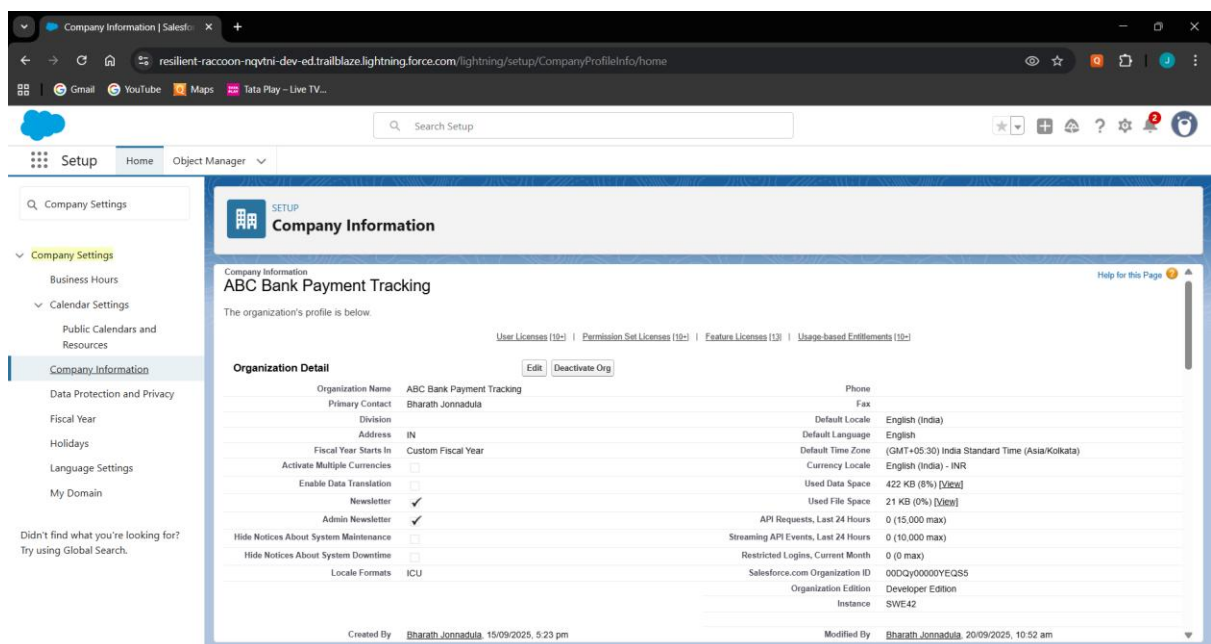
Salesforce Editions

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



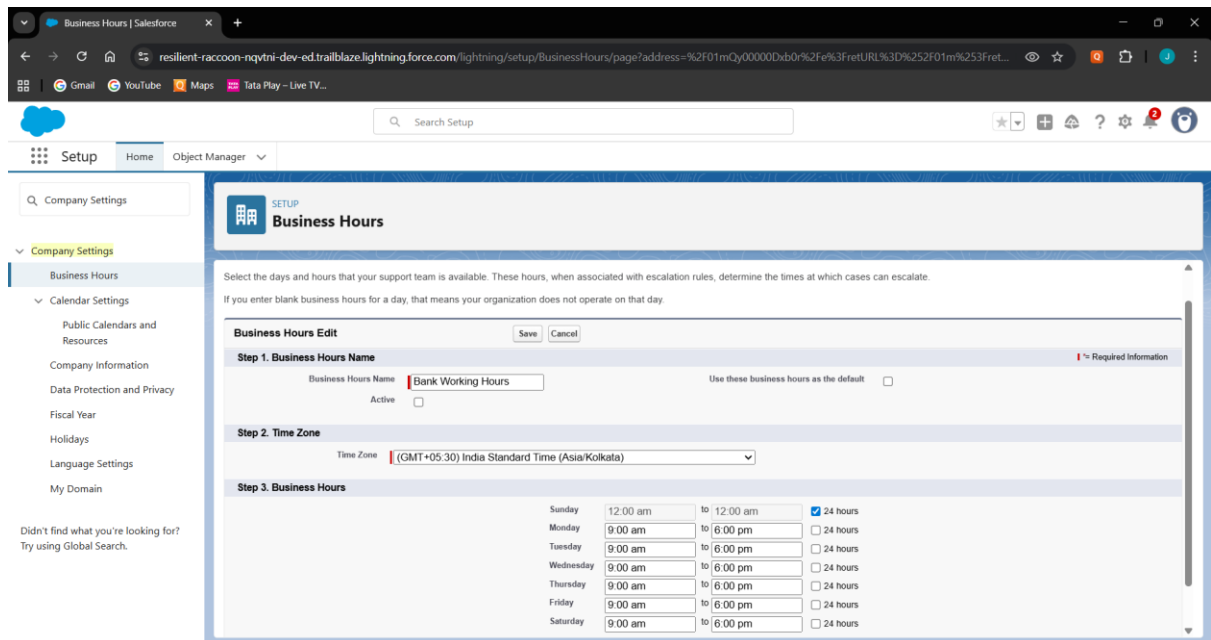
Company Profile Setup

- 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.



The screenshot shows the Salesforce Setup page for Business Hours. The left sidebar contains a navigation menu with 'Company Settings' expanded, showing 'Business Hours' as the selected option. The main content area is titled 'Business Hours' and includes a 'Business Hours Edit' section. This section has three steps: Step 1. Business Hours Name, Step 2. Time Zone, and Step 3. Business Hours. Step 1 shows 'Bank Working Hours' as the name, with a 'Save' button and a 'Cancel' button. Step 2 shows the time zone as '(GMT+05:30) India Standard Time (Asia/Kolkata)'. Step 3 shows a table of business hours for each day of the week, with '24 hours' selected for Sunday and Monday.

Business Hours Edit

Step 1. Business Hours Name

Business Hours Name: Use these business hours as the default: ☐

Active: ☐

Step 2. Time Zone

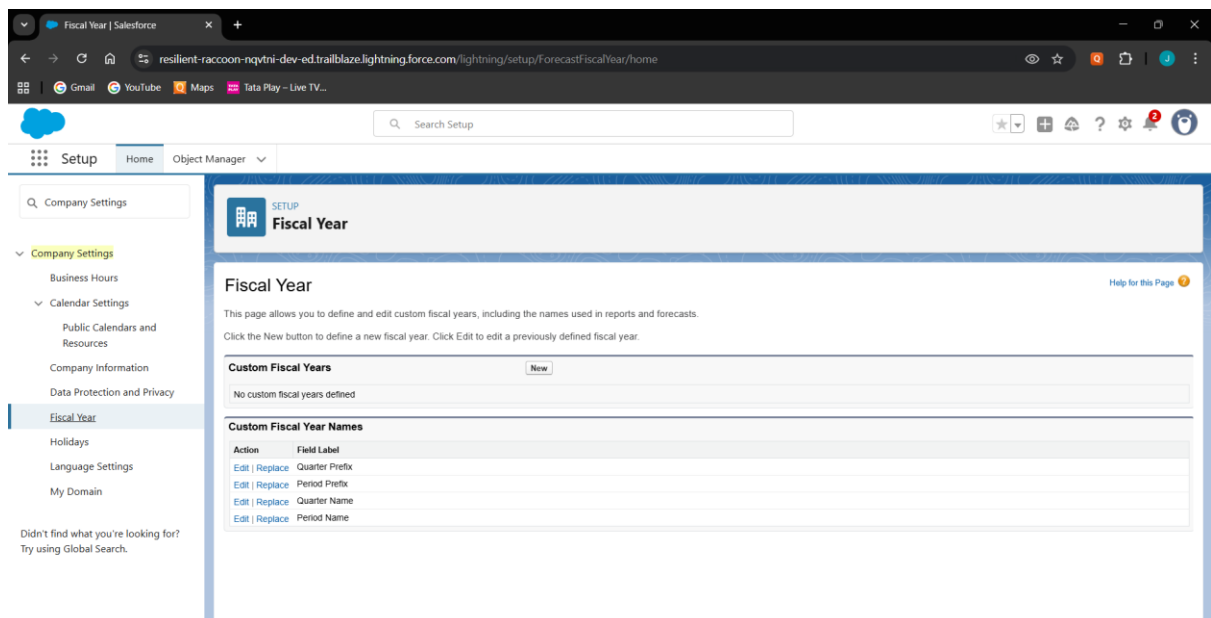
Time Zone:

Step 3. Business Hours

Day	From	To	24 hours
Sunday	12:00 am	to 12:00 am	<input checked="" type="checkbox"/>
Monday	9:00 am	to 6:00 pm	<input type="checkbox"/>
Tuesday	9:00 am	to 6:00 pm	<input type="checkbox"/>
Wednesday	9:00 am	to 6:00 pm	<input type="checkbox"/>
Thursday	9:00 am	to 6:00 pm	<input type="checkbox"/>
Friday	9:00 am	to 6:00 pm	<input type="checkbox"/>
Saturday	9:00 am	to 6:00 pm	<input type="checkbox"/>

Fiscal Year Settings

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



The screenshot shows the Salesforce Setup page for Fiscal Year. The left sidebar contains a navigation menu with 'Company Settings' expanded, showing 'Fiscal Year' as the selected option. The main content area is titled 'Fiscal Year' and includes a 'Custom Fiscal Years' section. This section has a 'New' button and a table of custom fiscal year names. The table has two columns: 'Action' and 'Field Label'. The table contains three rows: 'Quarter Prefix', 'Period Prefix', and 'Quarter Name'.

Fiscal Year

Custom Fiscal Years

No custom fiscal years defined

Custom Fiscal Year Names

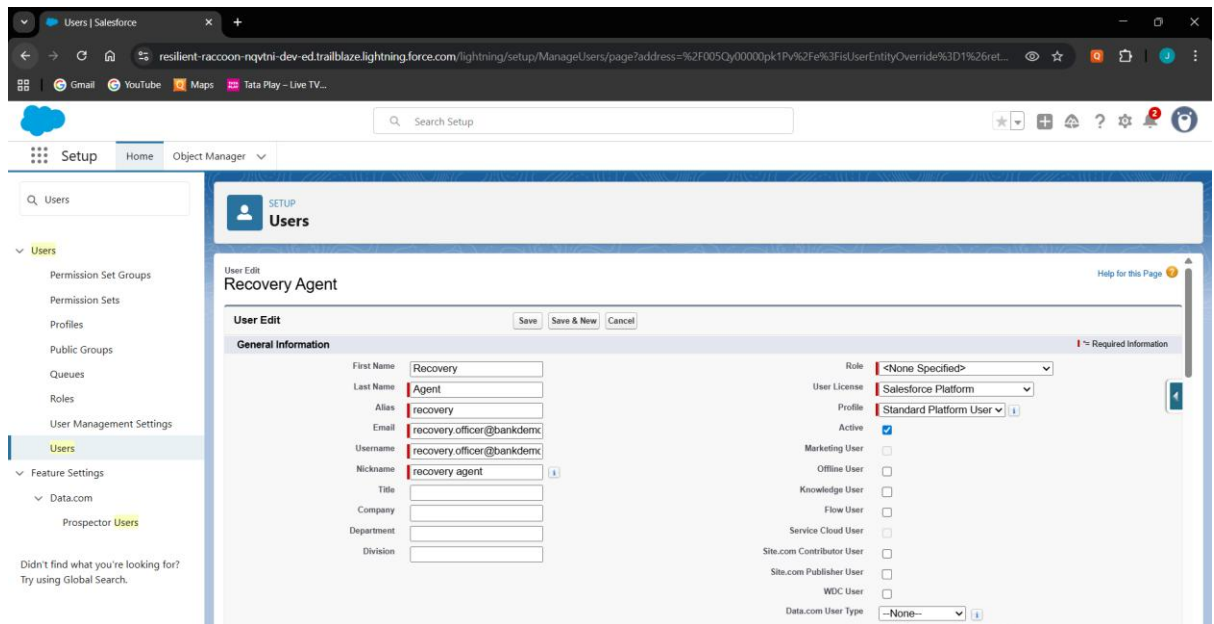
Action	Field Label
Edit Replace	Quarter Prefix
Edit Replace	Period Prefix
Edit Replace	Quarter Name
Edit Replace	Period Name

User Setup & Licenses

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

This screenshot shows the Salesforce 'Users' setup page for a user named 'Branch Manager'. The left sidebar contains navigation links for 'Users', 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', and 'User Management Settings'. The 'Users' section is expanded, showing 'Prospector Users' and a search bar. The main content area is titled 'User Edit Branch Manager' and includes a 'User Edit' header with 'Save', 'Save & New', and 'Cancel' buttons. Below this is the 'General Information' section, which contains fields for 'First Name' (Branch), 'Last Name' (Manager), 'Alias' (manager), 'Email' (bankmanager.officer@bank), 'Username' (bankmanager.officer@bank), 'Nickname' (manager), 'Title', 'Company', 'Department', and 'Division'. To the right of these fields are dropdown menus for 'Role' (None Specified), 'User License' (Salesforce), and 'Profile' (Manager Profile). Below these are checkboxes for 'Active' (checked), 'Marketing User', 'Offline User', 'Knowledge User', 'Flow User', 'Service Cloud User', 'Site.com Contributor User', 'Site.com Publisher User', 'WDC User', and 'Data.com User Type' (None). A 'Data.com Monthly Addition Limit' of 300 is also visible.

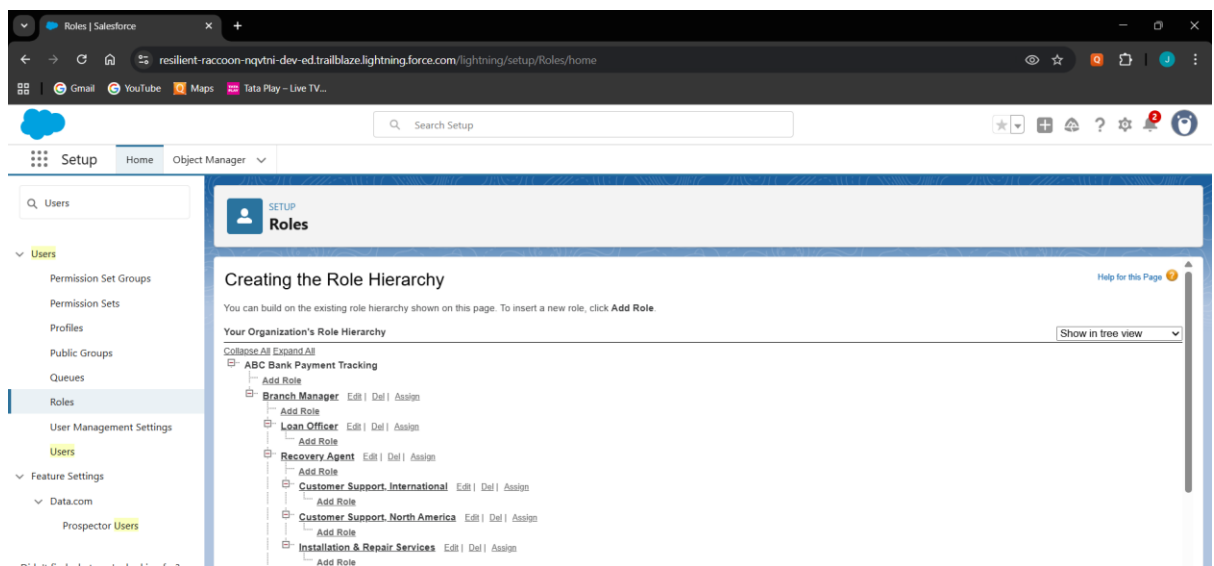
This screenshot shows the Salesforce 'Users' setup page for a user named 'Loan Officer'. The left sidebar is identical to the previous screenshot. The main content area is titled 'User Edit Loan Officer' and includes a 'User Edit' header with 'Save', 'Save & New', and 'Cancel' buttons. Below this is the 'General Information' section, which contains fields for 'First Name' (Loan), 'Last Name' (Officer), 'Alias' (loan), 'Email' (loan.officer@bankdemo.cor), 'Username' (loan.officer@bankdemo.cor), 'Nickname' (loanofficer), 'Title', 'Company', 'Department', and 'Division'. To the right of these fields are dropdown menus for 'Role' (None Specified), 'User License' (Salesforce Platform), and 'Profile' (Standard Platform User). Below these are checkboxes for 'Active' (checked), 'Marketing User', 'Offline User', 'Knowledge User', 'Flow User', 'Service Cloud User', 'Site.com Contributor User', 'Site.com Publisher User', 'WDC User', and 'Data.com User Type' (None). A 'Data.com Monthly Addition Limit' of 300 is also visible.



Profiles & Roles

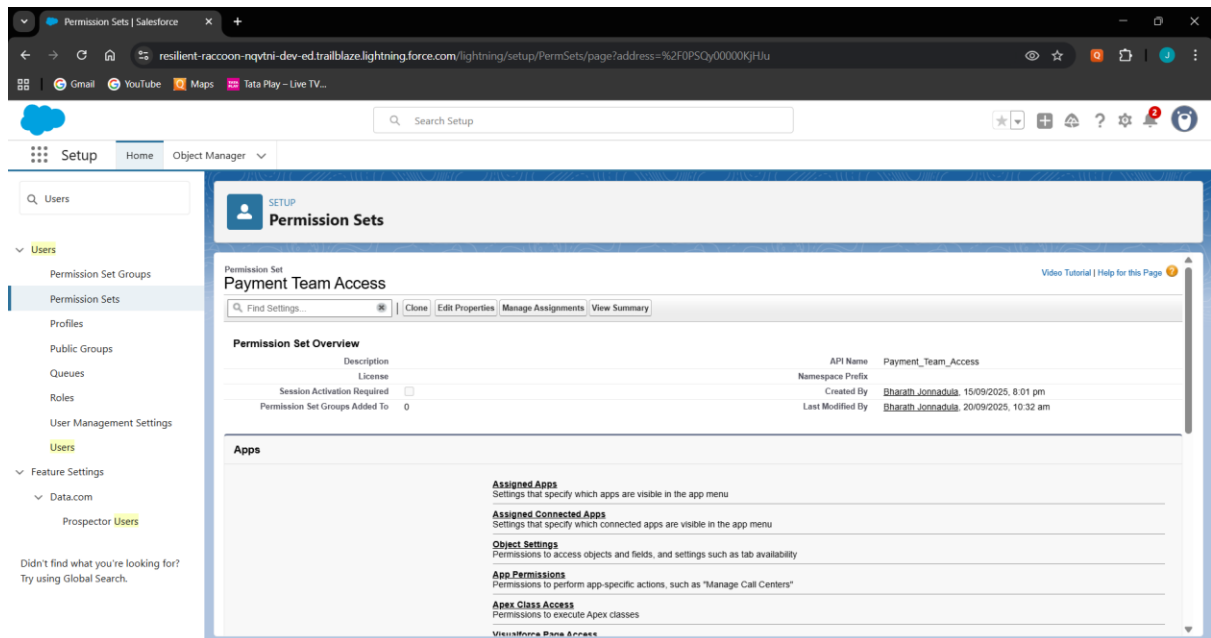
- Create custom profiles (Loan Officer, Manager, Recovery Agent).
- Establish role hierarchy (Manager → Loan Officer / Recovery Agent).

Agent).



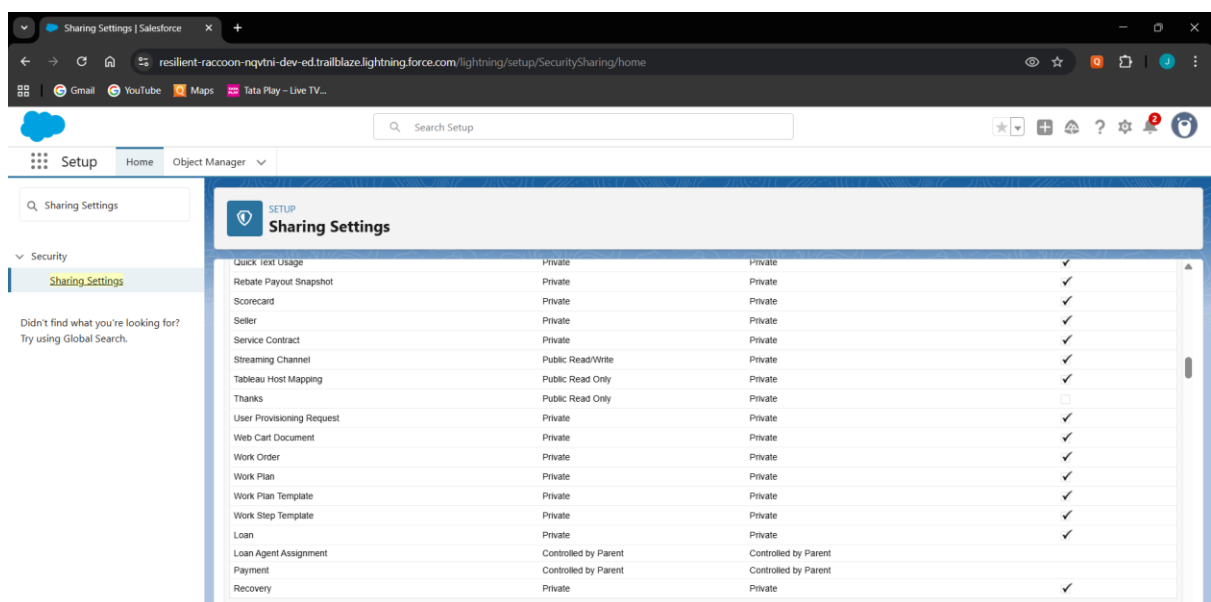
Permission Sets

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



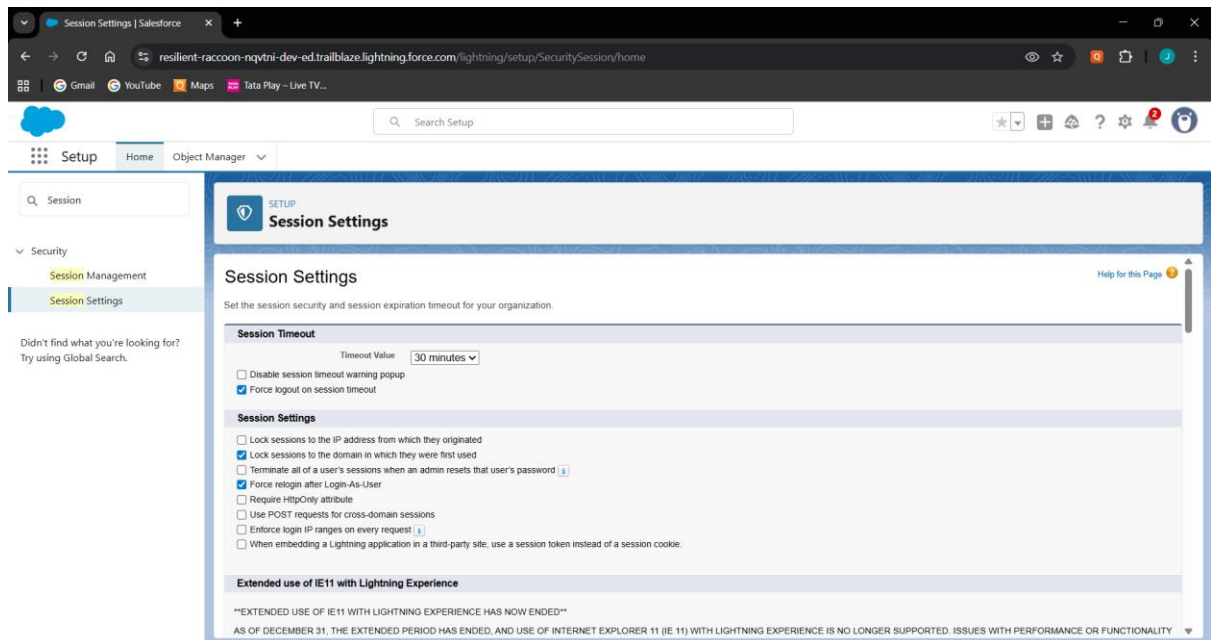
OWD & Sharing Rules

- 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.

