

## CLMS Project – Phase 2: Org Setup & Configuration

This document outlines the organizational setup and configuration for the *Corporate Loan Management System (CLMS)* implemented on Salesforce Developer Edition.

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### 1. Salesforce Editions

The CLMS project was developed using *Salesforce Developer Edition*, selected because it provides:

- Free access to the Salesforce platform for learning and development.
- Standard objects such as Accounts, Contacts, and Reports.
- Ability to create custom objects like *Loan Application* and *Loan Documents*.
- Full access to *profiles, roles, permission sets, OWD, and sharing rules*.
- App development and automation features (flows, workflows, validation rules).

This makes Developer Edition ideal for building an end-to-end corporate loan management solution.

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### 2. Company Profile Setup

The company profile defines organizational details in Salesforce:

- **Organization Name:** Corporate Loan Management System (CLMS)
- **Primary Contact:** K Nikhilesh Reddy
- **Address:** Tirupati, Andhra Pradesh, India
- **Default Locale:** Hindi (India)
- **Default Language:** English
- **Default Time Zone:** (GMT+05:30) India Standard Time (Asia/Kolkata)
- **Currency Locale:** English (United States) - USD
- **Organization Edition:** Developer Edition

This configuration aligns Salesforce with Indian financial and working standards.

SETUP

Company Information

Company Information

Corporate Loan Management System (CLMS)

[User Licenses \(10+\)](#) | 
 [Permission Set Licenses \(10+\)](#) | 
 [Feature Licenses \(11\)](#) | 
 [Usage-based Entitlements \(10+\)](#)

Organization Detail

Edit

Organization Name	Corporate Loan Management System (CLMS)	Phone	
Primary Contact	K Nikhilesh Reddy	Fax	
Division		Default Locale	Hindi (India)
Address	Tirupati Andhra Pradesh India	Default Language	English
Fiscal Year Starts In	Custom Fiscal Year	Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	English (United States) - USD
Enable Data Translation	<input type="checkbox"/>	Used Data Space	346 KB (7%) <a href="#">View</a>
Newsletter	<input checked="" type="checkbox"/>	Used File Space	17 KB (0%) <a href="#">View</a>
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	0 (15,000 max)
Hide Notices About System Maintenance	<input type="checkbox"/>	Streaming API Events, Last 24 Hours	0 (10,000 max)
Hide Notices About System Downtime	<input type="checkbox"/>	Restricted Logins, Current Month	0 (0 max)
Locale Formats	ICU	Salesforce.com Organization ID	00DgK00000BB9kS
		Organization Edition	Developer Edition
		Instance	CAN96

### 3. Business Hours & Holidays

Business hours ensure loan-related activities occur within official times:

#### Business Hours:

- Monday – Friday: 9:00 AM to 6:00 PM
- Saturday – Sunday: No Hours

#### Holidays Configured:

- Diwali → 10/18/2025
- Independence Day → 08/15/2026
- Republic Day → 01/26/2026

SETUP

Business Hours

Organization Business Hours

Help for this Page

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.

Holidays (3)

Business Hours Detail

Edit

Business Hours Name

CLMS Business Hours

Time Zone

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

Business Hours

Sunday

No Hours

Monday

9:00 AM to 6:00 PM

Tuesday

9:00 AM to 6:00 PM

Wednesday

9:00 AM to 6:00 PM

Thursday

9:00 AM to 6:00 PM

Friday

9:00 AM to 6:00 PM

Saturday

No Hours

Default Business Hours

✓

Active

✓

Created By

K.Nikhilesh Reddy 9/12/2025, 3:58 AM

Last Modified By

K.Nikhilesh Reddy 9/12/2025, 3:58 AM

Edit

Holidays

Add/Remove

Holiday Name

Description

Date and Time

Dussehra

10/18/2025 All Day

Independence Day

8/15/2026 All Day

Republic Day

1/26/2026 All Day

This prevents scheduling on non-working days and ensures accurate turnaround times.

#### 4. Fiscal Year Settings

The CLMS project uses a *custom fiscal year*:

- Fiscal Year Type:** Custom Fiscal Year
- FY 2026 Start Date:** 10/01/2025
- FY 2026 End Date:** 09/30/2026

Supports accurate financial planning, loan disbursement cycles, and EMI tracking.

SETUP

Fiscal Year

Fiscal Year

Help for this Page

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.

Custom Fiscal Years

New

Action

Year

FY Start Date

FY End Date

Description

Edit

2026

10/1/2025

9/30/2026


#### 5. User Setup & Licenses

Users represent stakeholders in corporate loan processing:

<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Login</a>	Manager_Branch	branch	branch.manager1@clms.com	Branch Manager	✓	<a href="#">Branch Manager Profile</a>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Login</a>	Manager_Credit	credit	credit.manager1@clms.com	Credit Manager	✓	<a href="#">manager.credit</a>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Login</a>	officer_finance	officer	officer.finance1@clms.com	Finance officer	✓	<a href="#">officer.finance</a>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Login</a>	Officer_Loan	loan	loan.officer1@clms.com	Loan Officer	✓	<a href="#">Loan Officer Profile</a>

User	Role in CLMS
Loan Officer	Creates and submits loan requests
Credit Manager	Reviews loan applications and decides approval
Finance Officer	Verifies approved loans and handles fund disbursement
Branch Manager	Oversees activities of Loan Officers, Credit Managers, and Finance Officers
CEO	Top-level oversight and access to all records

Each user was assigned a Salesforce License for standard platform access.


**SETUP**  
**Users**

### All Users

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. [Let's Go](#)

View: All Users Edit Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

New User Reset Password(s) Add Multiple Users

<input type="checkbox"/> Action	Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/> <a href="#">Edit</a>	Chatter Expert	Chatter	chatty.00d9k00000b0tksuat.w0skinj3xigh@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> <a href="#">Edit</a>   <a href="#">Login</a>	EPIC_OrgFarm	OEPIG	epic.cada3e78a5be@orgfarm.salesforce.com		✓	System Administrator
<input type="checkbox"/> <a href="#">Edit</a>   <a href="#">Login</a>	Manager_Branch	branch	branch.manager1@clms.com	Branch Manager	✓	Branch Manager Profile
<input type="checkbox"/> <a href="#">Edit</a>   <a href="#">Login</a>	Manager_Credit	credit	credit.mnager1@clms.com	Credit Manager	✓	Standard Platform User
<input type="checkbox"/> <a href="#">Edit</a>   <a href="#">Login</a>	officer_finance	officer	officer.finance1@clms.com	Finance officer	✓	Standard Platform User
<input type="checkbox"/> <a href="#">Edit</a>   <a href="#">Login</a>	Officer_Loan	loan	loan.officer1@clms.com	Loan Officer	✓	Loan Officer Profile
<input type="checkbox"/> <a href="#">Edit</a>	Reddy_K Nikhilesh	nik	nikhileshreddy.k157@agentforce.com		✓	System Administrator
<input type="checkbox"/> <a href="#">Edit</a>	User_Integration	integ	integration@00d9k00000b0tksuat.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> <a href="#">Edit</a>	User_Security	sec	insightssecurity@00d9k00000b0tksuat.com		✓	Analytics Cloud Security User

New User Reset Password(s) Add Multiple Users

## 6. Profiles

Profiles define object-level and field-level permissions:

User	Profile	Access Description
Loan Officer	Standard User	Create and edit Loan Applications

User	Profile	Access Description
Credit Manager	Standard User	Review and update Loan Applications
Finance Officer	Standard User	Manage financial records, disburse loans, update payments
Branch Manager	Standard User	Full visibility of subordinate roles and loan activities
CEO	System Admin	Complete control over the system

Branch Manager Profile

manager credit

officer finance

Loan Officer Profile

## 7. Roles

A role hierarchy reflects the organizational chain of command:

- *CEO*: Visibility into all records
- *Branch Manager*: Manages Credit and Finance Officers
- *Credit Manager*: Supervises Loan Officers and loan approvals
- *Loan Officer*: Creates loan requests
- *Finance Officer*: Handles fund release and financial reporting

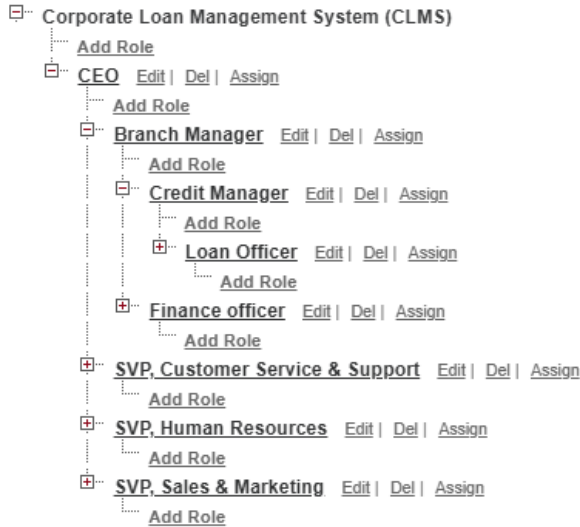


## Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

### Your Organization's Role Hierarchy

[Collapse All](#) [Expand All](#)



## 8. Permission Sets

A custom permission set “*Loan Document Access*” allows users to upload, view, and download loan-related files.

- Assigned to *Credit Manager, Finance Officer, and Branch Manager*
- Ensures proper document handling while maintaining security

## 9. Organization-Wide Defaults (OWD)

Defines baseline data access levels:

- *Loan Applications*: Private → Only the record owner and managers can access
- *Accounts and Contacts*: Public Read-Only → Basic customer details visible to all
- *Loan Documents*: Controlled by Parent → Access follows related Loan Application

Guarantees confidentiality of customer and loan data.

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## 10. Sharing Rules

Extend access beyond OWD:

- *Loan Applications*: Shared with Credit Manager and Finance Officer roles for processing and disbursing loans
- *Branch Manager*: Visibility to all records under their branch

Ensures collaboration while maintaining security.

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## 11. Login Access Policies

Configured to improve support and security:

- Enabled *Admin Login Access* for troubleshooting
  - Configured *IP restrictions* to limit unauthorized logins
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## 12. Developer Org Setup

Implementation used a *Salesforce Developer Org*:

- Free, fully functional Salesforce environment
  - Support for custom objects, roles, workflows, and reports
  - Flexibility to test and configure features before deployment
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## 13. Sandbox Usage

- Developer Edition does *not support Sandboxes*
  - Testing performed directly in the Developer Org
  - Documented as a limitation but manageable due to academic scope
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## 14. Deployment Basics

A custom Lightning App named *CLMS* has been created. This app centralizes access to the core business objects:

- *Loan Applications*
- *Loan Documents*
- *Accounts*
- *Contacts*
- *EMI Schedules*
- *Users*
- *Reports*

This setup provides a single interface for all stakeholders to access, manage, and track loan-related operations efficiently within Salesforce.