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.

3. Business Hours & Holidays

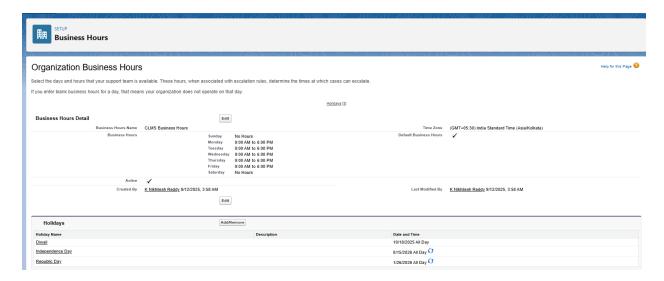Business hours ensure loan-related activities occur within official times:

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

This prevents scheduling on non-working days and ensures accurate turnaround times.
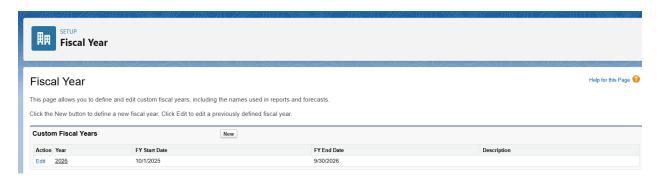
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4. Fiscal Year Settings

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.
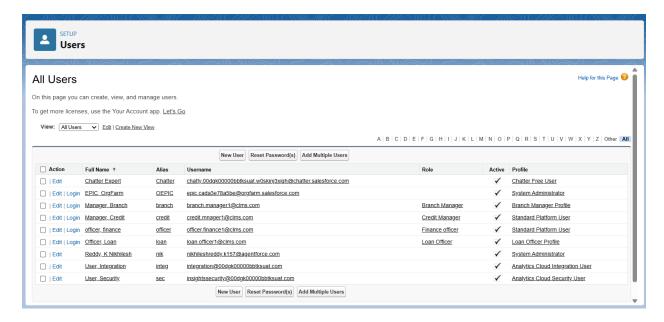

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5. User Setup & Licenses

Users represent stakeholders in corporate loan processing:

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.

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

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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

SETUP
Roles

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
- Corporate Loan Management System (CLMS)
  - Add Role
  - CEO Edit | Del | Assign
    - Add Role
    - Branch Manager Edit | Del | Assign
      - Add Role
      - Credit Manager Edit | Del | Assign
        - Add Role
        - Loan Officer Edit | Del | Assign
          - Add Role
      - Finance officer Edit | Del | Assign
        - Add Role
  - SVP, Customer Service & Support Edit | Del | Assign
    - Add Role
  - SVP, Human Resources Edit | Del | Assign
    - Add Role
  - SVP, Sales & Marketing Edit | Del | Assign
    - Add Role

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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

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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.