Smart Banking CRM – Phase 2

Phase 2: Org Setup & Configuration

● **Salesforce Editions**

Understand different Salesforce editions (Essentials, Professional, Enterprise, Unlimited) and choose the right edition based on project needs.

● **Company Profile Setup**

Configure company information including address, primary contact, default locale, and currency.

● **Business Hours & Holidays**

Define standard working hours and holiday calendars for case escalation and SLA tracking.

● **Fiscal Year Settings**

Set fiscal year as standard or custom, aligning CRM reports with banking financial cycles.

● **User Setup & Licenses**

Create users and assign Salesforce licenses based on their roles and responsibilities.

● **Profiles**

Define permissions like object-level access, tab visibility, and record type assignments for different users.

● **Roles**

Create role hierarchy to ensure data visibility and reporting structure across departments.

● **Permission Sets**

Provide additional access to specific features without changing user profiles.

● **OWD**

Set Organization-Wide Defaults (OWD) for objects like Customer, Loan, Account to control baseline record visibility.

● **Sharing Rules**

Define criteria-based or owner-based sharing rules for cross-department data access.

● **Login Access Policies**

Configure trusted IP ranges, login hours, and MFA (Multi-Factor Authentication) for security.

● **Dev Org Setup**

Use Salesforce Developer Org for building and testing CRM functionalities.

● **Sandbox Usage**

Leverage Sandboxes (Developer, Partial, Full) for testing before production deployment.

● **Deployment Basics**

Use Change Sets or Salesforce CLI for migrating metadata between Sandbox and Production environments.