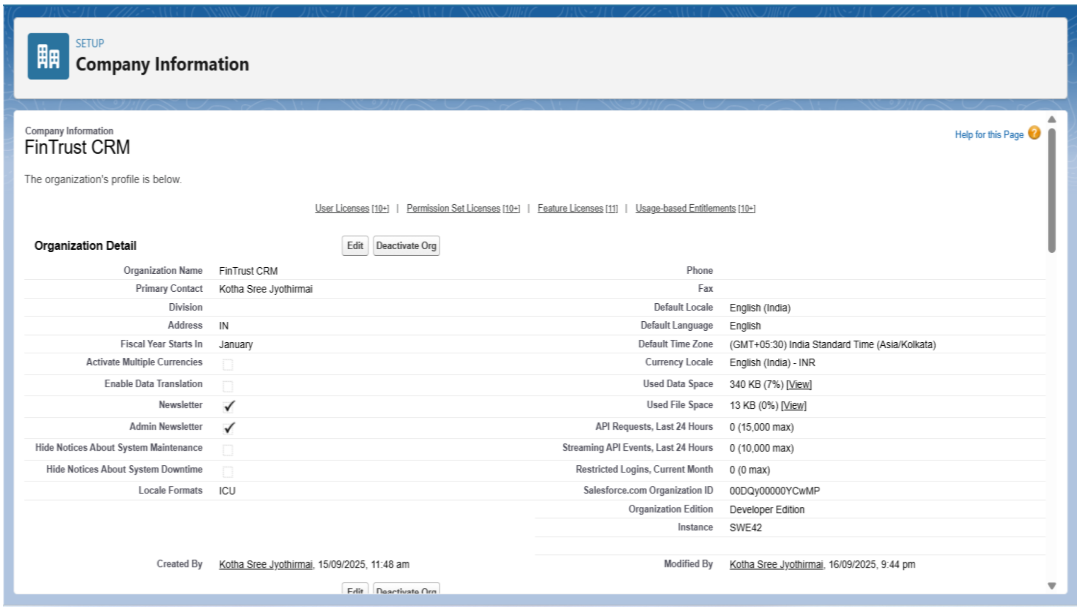
Phase 2: Org Setup & Configuration

Step 1: Company Information Setup

From your shared data:

1. **Organization Name:** salesforce → leave as-is or update to FinTrust CRM for clarity.
2. **Primary Contact:** Kotha Sree Jyothirmai → correct.
3. **Locale & Time Zone:**
   - Default Locale: English (India)
   - Default Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)
4. **Default Currency:** INR



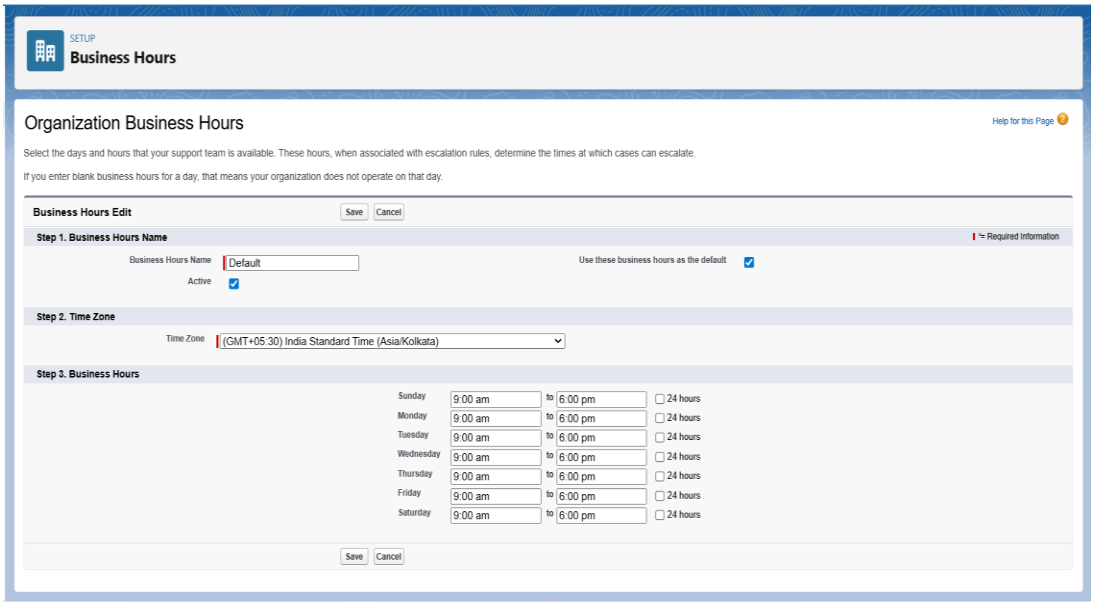
Step 2: Business Hours

Go to Setup → search for Business Hours in the Quick Find.

In standard business hours set;

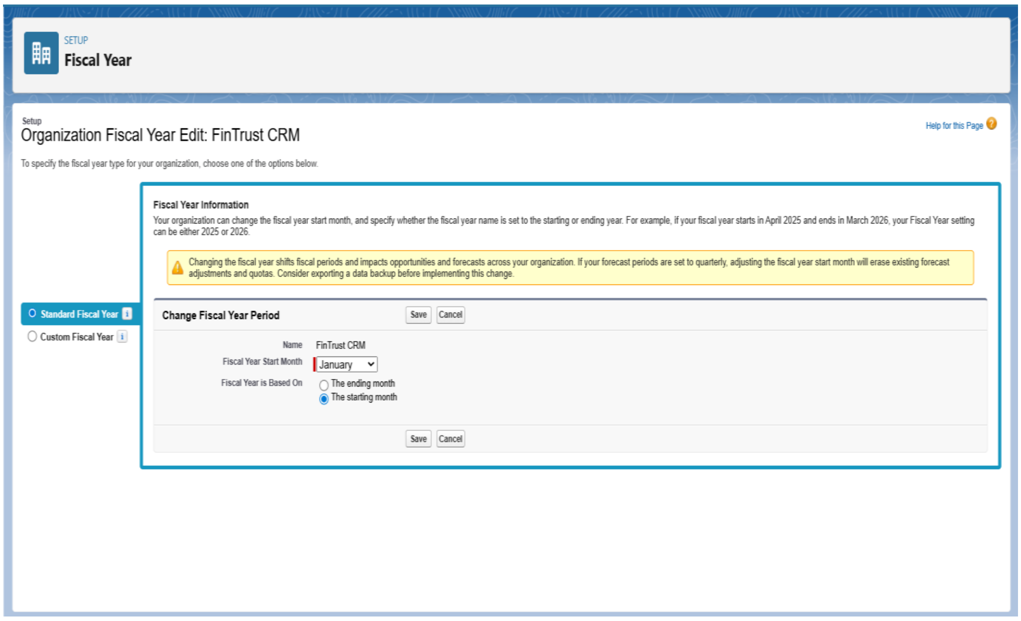
- **Business Hours Name:** Default
- **Use these business hours as the default:** Check
- **Active:** Check
- **Time Zone:** (GMT+05:30) India Standard Time (Asia/Kolkata)

  Ensures all business hours and case escalations follow Indian Standard Time.
- Set **9:00 am to 6:00 pm**.



Step 3:Fiscal Year Setup – Step by Step

1. **Navigate to Fiscal Year Setup**
   - Path: Setup → Fiscal Year.
2. **Choose Fiscal Year Type**
   - Select **Standard Fiscal Year** (Jan–Dec) **or Custom Fiscal Year** if months differ.
3. **Configure Start Month**
   - Select the starting month (e.g., **January**).
4. **Save**



Step 4:Holidays

1. Navigate to Holidays

1. Go to **Setup** → search for **Holidays** in the Quick Find box → click **Holidays**.

2. Create a New Holiday

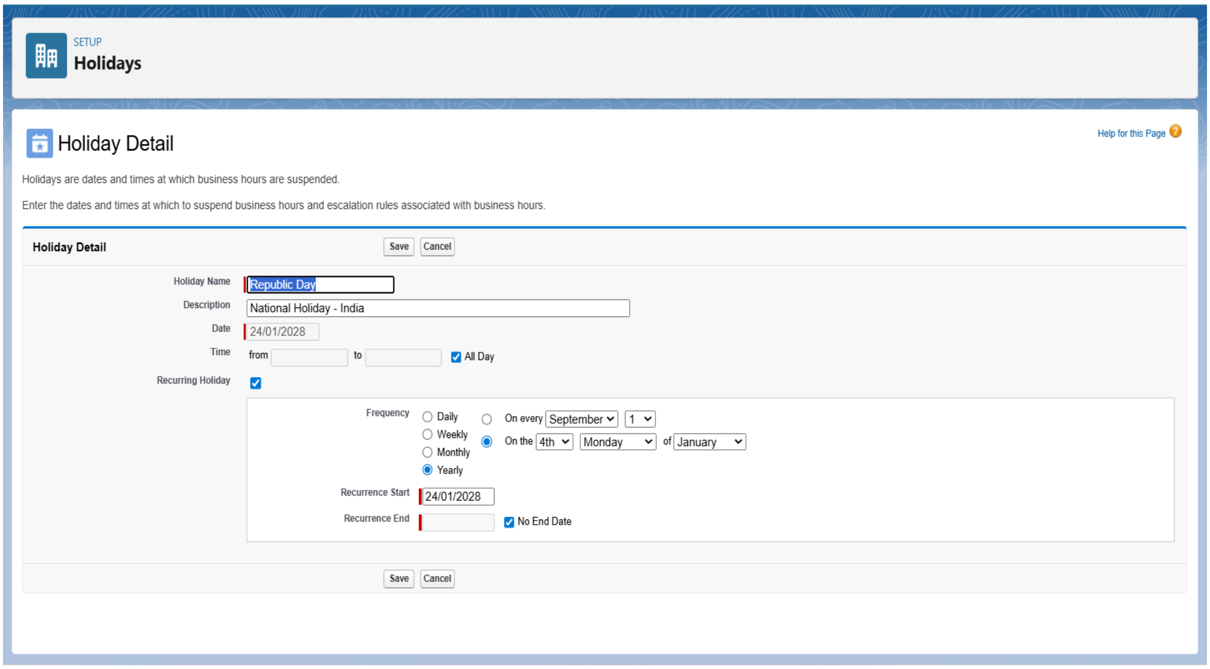
1. Click **New Holiday**.
2. Fill in the fields:

Ex:

Field	Example / Instruction
Holiday Name	Republic Day
Description	National holiday - India (optional)
Start Date	26/01/2026 (choose your date)
End Date	Same as Start Date if single day
Recurrence	Check if this holiday occurs every year (optional)
Active	Checked

- Click **Save**.

3. Repeat for Other Holidays



Step 5:Roles Setup

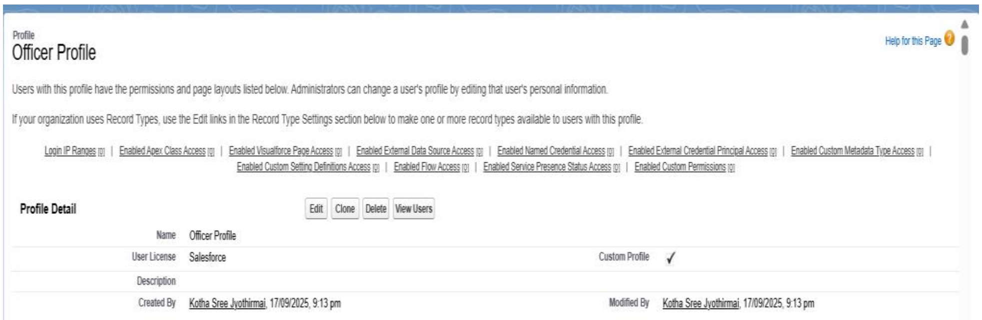
- Go to Setup → search Roles in Quick Find.
- Click Set Up Roles.
- Click Expand All to view the hierarchy**.**
- Create the final hierarchy

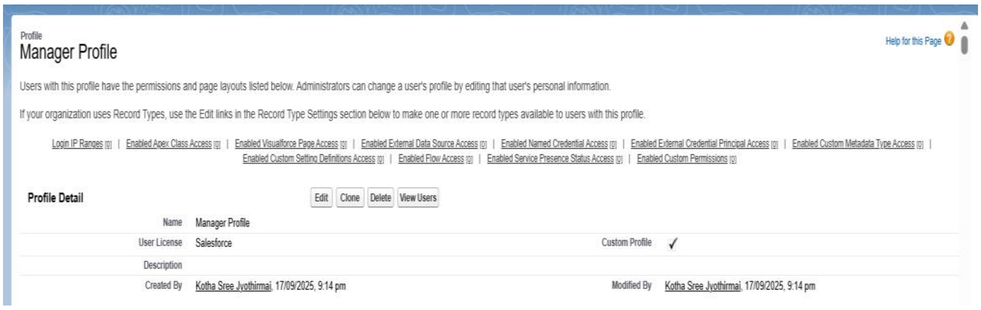
CEO
└── Manager
├── Loan Officer
└── Customer Service

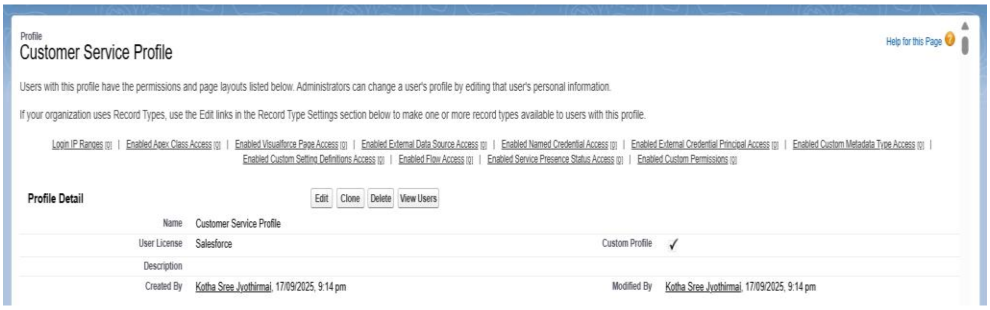
Step 6: Profiles setup

1. Create Custom Profiles

1. Go to Setup → Profiles.
2. Find Standard User profile / custom: sales profile.
3. Click Clone → rename it for each role:
    - Officer Profile
    - Manager Profile
    - Customer Service Profile
4. Save each profile**.**







Step 7: Create Custom Objects

1. Go to Setup → Object Manager.
2. Click Create → Custom Object.
3. Fill details:
   - Label: Loan Application
   - Object Name: Loan_Application
   - Plural Label: Loan Applications
   - Save.
4. Repeat for:
   - Label: EMI
   - Object Name: EMI
   - Plural Label: EMIs
   - Save

Step 8: Assign Object Permissions

1. Open the Profile Name you created.
2. Go to Object Settings.
3. Set permissions:
   - Loan_Application__c → ✅ Read, Create, Edit, Delete
   - EMI__c → ✅ Read, Create, Edit (No Delete)
4. Scroll down to Administrative Permissions → Enable:
   - Run Reports
   - Export Reports
5. Click Save.

Step 9: Permission Sets

Use Permission Sets for additional access without changing the profile.

1. Go to Setup → Permission Sets.
2. Click New.
3. Enter details:
   - Label: Loan Management Access
   - License: Salesforce Platform
4. Save.
5. Add permissions you need (e.g., API Enabled, Export Reports).
6. Assign to users as required.

Step 10: Create a Users

Go to Setup → Users → Users → New User.

1. Fill in details:
   - First Name / Last Name: Ravi Kumar
   - Alias: rkumar
   - Email: ravi.kumar@demo.com (any valid email, even your secondary email works)
   - Username: must be unique across Salesforce, e.g. rkumar.demo@loancrm.com
   - User License: Salesforce

    - Profile: Officer Profile
    - Check Active ☑

2. Save.

   Repeat for Manager & Customer Service

- Create another user with Manager Profile.
- Create another user with Customer Service Profile.

  (or)

- Setup → **Users** → New Users as loan officer, manager, customer service.
    - Loan Officer → loan.officer@fintrust.dev (assign Officer Profile + Role).
    - Manager → manager@fintrust.dev (assign Manager Profile + Role).
    - Customer Service → customer.service@fintrust.dev (assign Customer Service Profile + Role).

Step 10: Understand Org-Wide Defaults (OWD)

Org-Wide Defaults control the baseline level of access users have to each object's records.

- Setup → Sharing Settings
- Scroll to Organization-Wide Defaults**.**
- Click Edit**.**
    - Loan_Application__c = Private
    - Contact = Public Read Only
    - EMI_c=private

  Save.

Step 11: Sharing Rules

Since Loan_Application__c,EMI_c is private, some users like Managers or Loan Officers may need access to other users' loan records.

Sharing Rules allow you to grant additional access beyond OWD:

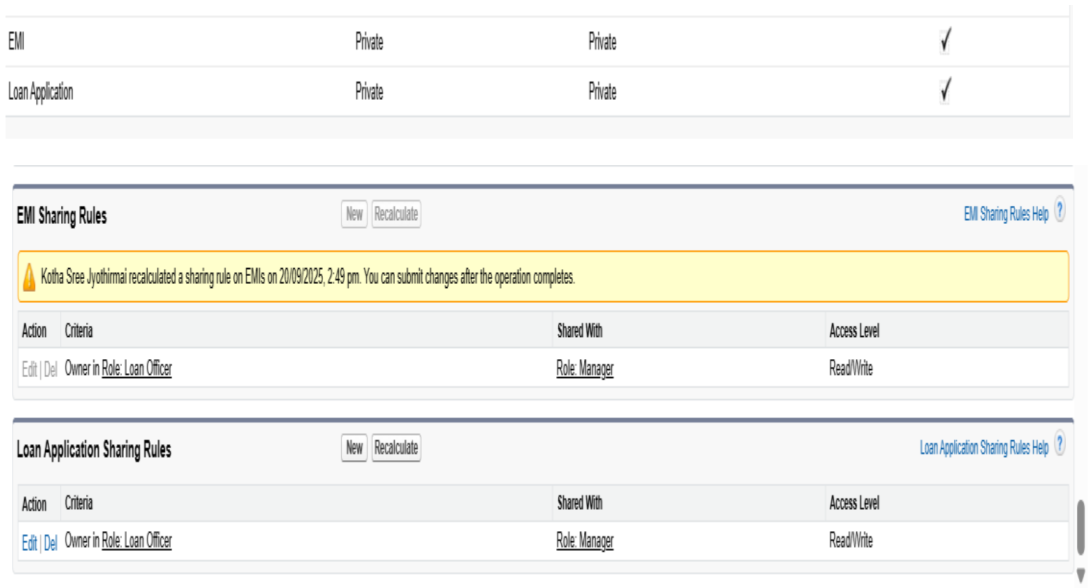
- You can share by:
    - Role (e.g., all Managers see all Loan Applications)
    - Public Groups (a set of users)
    - Criteria (e.g., all loan applications with status "Pending")

Sharing Rule	What it does
Manager Sharing	Managers can view/edit all Loan Applications in their branch.
Officer Sharing	Loan Officers can view all Loan Applications in their role group.

Create Sharing Rules

1. Go to **Setup** → **Sharing Settings**.
2. Scroll to **Loan_Application__c Sharing Rules**.
3. Click **New Sharing Rule**.
4. Choose **Rule Type**:
   - **Based on Role** (common for Managers/Officers)
5. Define **Access Level**:
   - Read/Write (if they should edit records)
   - Read Only (if they only need to view)
6. Save the rule and **run the sharing recalculation** (Salesforce automatically propagates access).

7. Do same for EMI_c.



Step 12: Assign the Permission Set to Users

1. Still inside the Permission Set → Manage Assignments
2. Click Add Assignments
3. Select:

- Loan Officer
- Manager
- Customer Service

4. Save