

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

The screenshot shows the 'Company Information' setup page in Salesforce. The page title is 'Company Information' with a subtitle 'FinTrust CRM'. Below the title, it says 'The organization's profile is below.' There are tabs for 'User Licenses (10)', 'Permission Set Licenses (10)', 'Feature Licenses (10)', and 'Usage-based Entitlements (10)'. The 'Organization Detail' section has 'Edit' and 'Deactivate Org' buttons. The form contains the following fields:

Field	Value
Organization Name	FinTrust CRM
Primary Contact	Kotha Sree Jyothirmai
Phone	
Fax	
Division	
Default Locale	English (India)
Address	IN
Default Language	English
Fiscal Year Starts In	January
Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Activate Multiple Currencies	<input type="checkbox"/>
Currency Locale	English (India) - INR
Enable Data Translation	<input type="checkbox"/>
Used Data Space	340 KB (7%) View
Newsletter	<input checked="" type="checkbox"/>
Used File Space	13 KB (0%) View
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	00DQy00000YCwMP
Organization Edition	Developer Edition
Instance	SWE42

Created By: Kotha Sree Jyothirmai, 15/09/2025, 11:48 am
Modified By: Kotha Sree Jyothirmai, 16/09/2025, 9:44 pm

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**.

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.

Business Hours Edit

Save

Cancel

Step 1. Business Hours Name

Business Hours Name

Default

Active

☒

Use these business hours as the default

☒

Step 2. Time Zone

Time Zone

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

Step 3. Business Hours

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

Save

Cancel

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

SETUP

Fiscal Year

Setup

Organization Fiscal Year Edit: FinTrust CRM

Help for this Page

To specify the fiscal year type for your organization, choose one of the options below.

Standard Fiscal Year

Custom Fiscal Year

Fiscal Year Information

Your organization can change the fiscal year start month, and specify whether the fiscal year name is set to the starting or ending year. For example, if your fiscal year starts in April 2025 and ends in March 2026, your Fiscal Year setting can be either 2025 or 2026.

Changing the fiscal year shifts fiscal periods and impacts opportunities and forecasts across your organization. If your forecast periods are set to quarterly, adjusting the fiscal year start month will erase existing forecast adjustments and quotas. Consider exporting a data backup before implementing this change.

Change Fiscal Year Period

Save

Cancel

Name

FinTrust CRM

Fiscal Year Start Month

January

Fiscal Year is Based On

☐ The ending month

☒ The starting month

Save

Cancel

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

SETUP
Holidays

Holiday Detail [Help for this Page](#)

Holidays are dates and times at which business hours are suspended.
Enter the dates and times at which to suspend business hours and escalation rules associated with business hours.

Holiday Detail Save Cancel

Holiday Name

Description

Date

Time from to ☒ All Day

Recurring Holiday ☒

Frequency ☐ Daily ☐ On every

☒ On the of

☒ Monthly ☒ Yearly

Recurrence Start

Recurrence End ☒ No End Date

Save Cancel

Step 5: Roles Setup

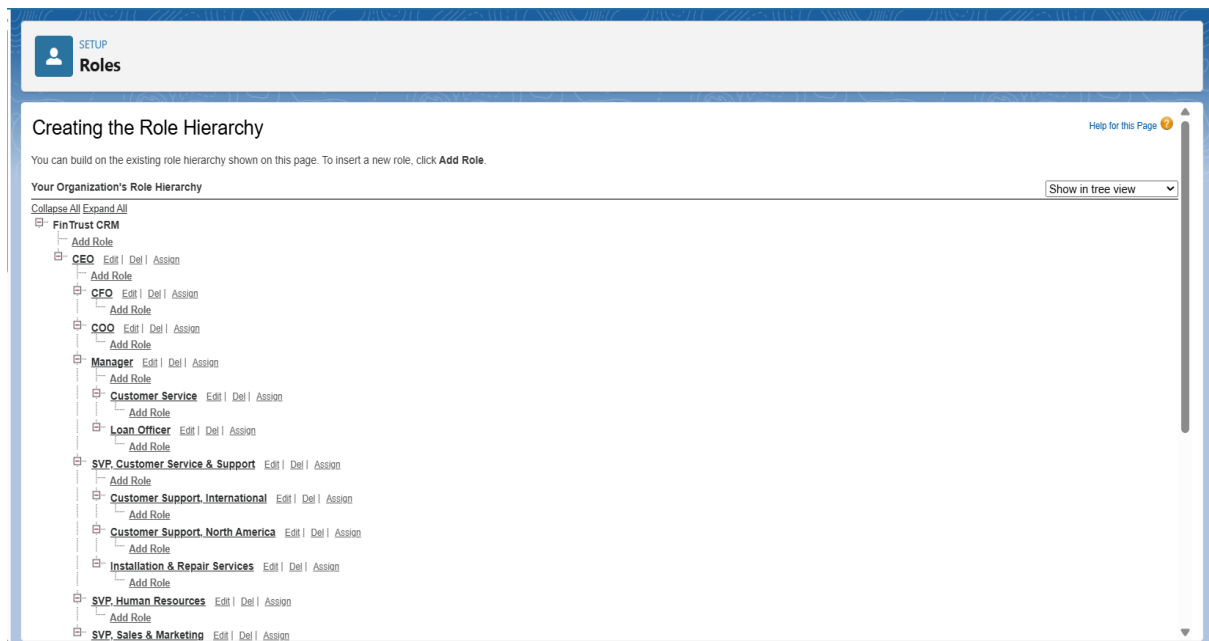
- Go to Setup → search Roles in Quick Find.
- Click Set Up Roles.
- Click Expand All to view the hierarchy.
- Create the final hierarchy

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.

Profile
Officer Profile

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges](#) | [Enabled Apex Class Access](#) | [Enabled Visualforce Page Access](#) | [Enabled External Data Source Access](#) | [Enabled Named Credential Access](#) | [Enabled External Credential Principal Access](#) | [Enabled Custom Metadata Type Access](#) | [Enabled Custom Setting Definitions Access](#) | [Enabled Flow Access](#) | [Enabled Service Presence Status Access](#) | [Enabled Custom Permissions](#)

Profile Detail [Edit](#) [Clone](#) [Delete](#) [View Users](#)

Name	Officer Profile		
User License	Salesforce	Custom Profile	✓
Description			
Created By	Kooha Sree Jyothirmaj	Modified By	Kooha Sree Jyothirmaj
	17/09/2025, 9:13 pm		17/09/2025, 9:13 pm

Profile
Manager Profile

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges](#) | [Enabled Apex Class Access](#) | [Enabled Visualforce Page Access](#) | [Enabled External Data Source Access](#) | [Enabled Named Credential Access](#) | [Enabled External Credential Principal Access](#) | [Enabled Custom Metadata Type Access](#) | [Enabled Custom Setting Definitions Access](#) | [Enabled Flow Access](#) | [Enabled Service Presence Status Access](#) | [Enabled Custom Permissions](#)

Profile Detail [Edit](#) [Clone](#) [Delete](#) [View Users](#)

Name	Manager Profile		
User License	Salesforce	Custom Profile	✓
Description			
Created By	Kooha Sree Jyothirmaj	Modified By	Kooha Sree Jyothirmaj
	17/09/2025, 9:14 pm		17/09/2025, 9:14 pm

Profile
Customer Service Profile

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges](#) | [Enabled Apex Class Access](#) | [Enabled Visualforce Page Access](#) | [Enabled External Data Source Access](#) | [Enabled Named Credential Access](#) | [Enabled External Credential Principal Access](#) | [Enabled Custom Metadata Type Access](#) | [Enabled Custom Setting Definitions Access](#) | [Enabled Flow Access](#) | [Enabled Service Presence Status Access](#) | [Enabled Custom Permissions](#)

Profile Detail [Edit](#) [Clone](#) [Delete](#) [View Users](#)

Name	Customer Service Profile		
User License	Salesforce	Custom Profile	✓
Description			
Created By	Kooha Sree Jyothirmaj	Modified By	Kooha Sree Jyothirmaj
	17/09/2025, 9:14 pm		17/09/2025, 9:14 pm

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.

EMI	Private	Private	✓
Loan Application	Private	Private	✓

EMI Sharing Rules New Recalculate EMI Sharing Rules Help ?

 Kotha Sree Jyothimal recalculated a sharing rule on EMIs on 20/09/2025, 2:49 pm. You can submit changes after the operation completes.

Action	Criteria	Shared With	Access Level
Edit Del	Owner in Role: Loan Officer	Role: Manager	Read/Write

Loan Application Sharing Rules New Recalculate Loan Application Sharing Rules Help ?

Action	Criteria	Shared With	Access Level
Edit Del	Owner in Role: Loan Officer	Role: Manager	Read/Write

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

... > PERMISSION SET 'LOAN MANAGEMENT ACCESS' > MANAGE ASSIGNMENTS

Loan Management Access

Assignment Summary

Full Name	User License	Expires On	Time Zone	Status
Loan Officer	Salesforce Platform			✓ Success
Manager 1	Salesforce Platform			✓ Success
Customer Service	Salesforce Platform			✓ Success

Done

SETUP

Login Access Policies

Login Access Policies

Control which support organizations your users can grant login access to.

✓ Changes Saved

Manage Support Options

Save Cancel

Setting	Enabled
Administrators Can Log in as Any User	<input checked="" type="checkbox"/>
Support Organization	Packages
Salesforce.com Support	Available to Users
	Available to Administrators Only

Save Cancel