

Finance Management System – Phase 2: Salesforce Org Setup & Configuration

This document captures the **step-by-step setup** of the Salesforce Developer Org and initial configuration for the **Finance Management System** project.

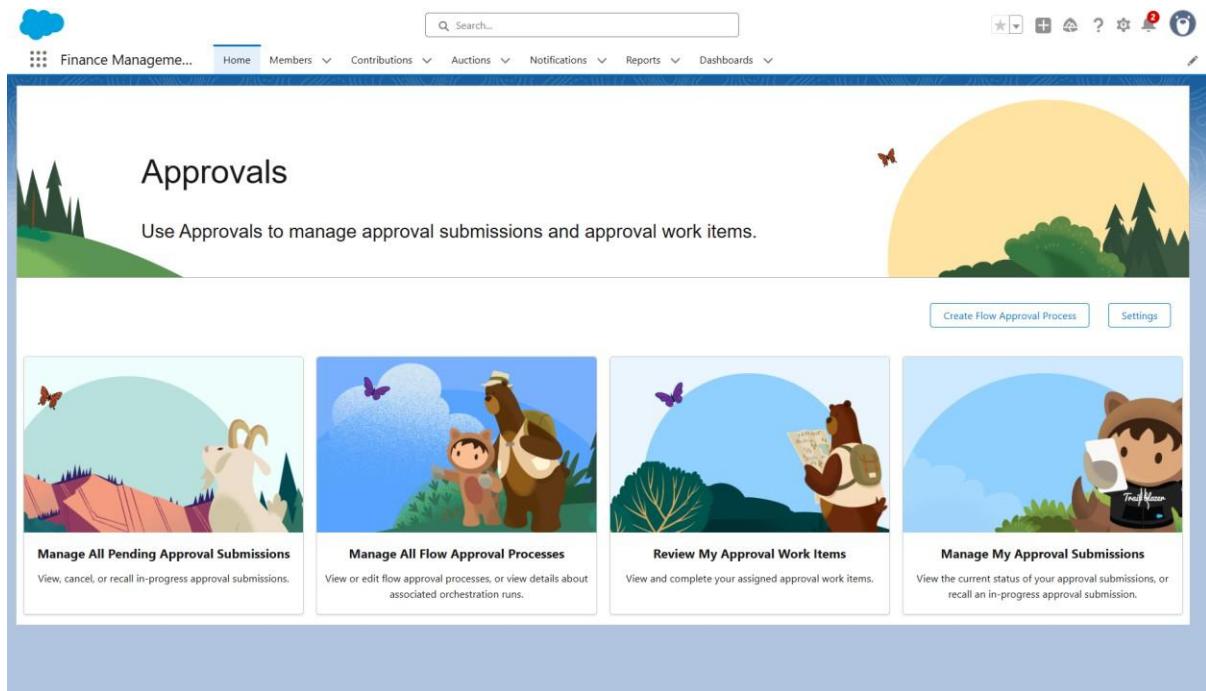
◆ Step 1: Sign Up for Salesforce Developer Edition

- Signed up at <https://developer.salesforce.com/signup>
- Verified email and logged into <https://login.salesforce.com>
- Username: manikantapemmireddy66579@agentforce.com

The screenshot shows the 'Personal Information' page in the Salesforce developer edition. The user is editing their personal details. The 'Details' section contains fields for First Name (Pemmireddy), Last Name (Durga Naga Padmanabha M), Alias (man), Email (manikantapemmireddy30@agentforce.com), Username (User175791429602295528), Nickname (User175791429602295528), Phone, Extension, Fax, and Mobile (+91 9391114657). The 'Address' section has fields for Country (None), Street, City, State/Province (None), and Zip/Postal Code. The 'My Work Information' section includes Company Name (Smart Bridge), Title, Department, Division, Employee Number, Start of Day (6:00 AM), and End of Day (11:00 PM). At the bottom, there are 'Save' and 'Cancel' buttons. The left sidebar shows navigation links for My Personal Information, Advanced User Details, Approver Settings, Authentication Settings for External Systems, Change My Password, Connections, External Credentials, Grant Account Login Access, Language & Time Zone, Login History, Personal Information, Reset My Security Token, Display & Layout, Email, Chatter, Calendar & Reminders, Desktop Add-ONS, and Import.

◆ Step 2: Create a New Lightning App

- Went to **App Manager → New Lightning App**
- App Name: **Finance Management System**
- Added navigation items (Members, Contributions, Auctions, Notifications)
- Assigned visibility to relevant profiles



◆ Step 3: Create Custom Objects

Created the following **Custom Objects** with their respective fields:

1. Member

- Member ID (Auto Number: MEM-{0000})
- Phone (Phone)
- Email (Email)
- Address (Text Area)
- Join Date (Date)
- Status (Picklist: Active, Inactive, Defaulted)
- Is Premium Member? (Checkbox)
- KYC ID (Text)
- Total Contributions (Currency / Roll-Up Summary)

The screenshot shows the Salesforce Setup interface with the following details:

Header: Search Setup, Home, Object Manager

Breadcrumbs: SETUP > OBJECT MANAGER

Section: Member

Details:

Details	Details
Fields & Relationships	Description
Page Layouts	API Name
Lightning Record Pages	Member_c
Buttons, Links, and Actions	Custom
Compact Layouts	✓
Field Sets	Singular Label
Object Limits	Member
Record Types	Plural Label
Related Lookup Filters	Members
Restriction Rules	
Scoping Rules	
Object Access	
Triggers	
Flow Triggers	
Validation Rules	
Conditional Field Formatting	

Buttons: Edit, Delete

2. Contribution

- Contribution ID (Auto Number: CONT-{0000})
- Member (Lookup → Member)
- Amount (Currency)
- Payment Date (Date)
- Mode of Payment (Picklist: Cash, Bank Transfer, UPI, Other)
- Status (Picklist: Paid, Pending, Overdue)
- Late Payment? (Checkbox)
- Transaction ID (Text)

The screenshot shows the Salesforce Setup interface with the following details:

Setup > OBJECT MANAGER

Contribution

Details

Fields & Relationships	Details
Page Layouts	Description
Lightning Record Pages	API Name Contribution_c
Buttons, Links, and Actions	Custom ✓
Compact Layouts	Singular Label Contribution
Field Sets	Plural Label Contributions
Object Limits	
Record Types	
Related Lookup Filters	
Restriction Rules	
Scoping Rules	
Object Access	
Triggers	
Flow Triggers	
Validation Rules	
Conditional Field Formatting	

Details

Enable Reports
Track Activities
Track Field History
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window

Edit | Delete

3. Auction

- Auction Name (Text)
- Auction Date (Date)
- Winner (Lookup → Member)
- Bid Amount (Currency)
- Payout Amount (Currency)
- Is Closed? (Checkbox)
- Remarks (Text Area)

The screenshot shows the Salesforce Setup interface with the following details:

Header: Search Setup, Home, Object Manager

Breadcrumbs: SETUP > OBJECT MANAGER

Section: Auction

Left Sidebar (Details):

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Restriction Rules
- Scoping Rules
- Object Access
- Triggers
- Flow Triggers
- Validation Rules
- Conditional Field Formatting

Right Panel (Details):

Setting	Value
Description	
API Name	Auction__c
Custom	✓
Singular Label	Auction
Plural Label	Auctions
Enable Reports	
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Buttons: Edit, Delete

4. Notification

- Notification ID (Auto Number: NOTI-{0000})
- Related Member (Lookup → Member)
- Notification Type (Picklist: SMS, Email, WhatsApp)
- Date (Date/Time)
- Status (Picklist: Sent, Failed, Pending)
- High Priority? (Checkbox)

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. Under the 'Notifications' object, the 'Details' tab is active. On the left, a sidebar lists various setup categories like Fields & Relationships, Page Layouts, and Record Types. The main details pane shows fields such as API Name (Notification_c), Singular Label (Notification), Plural Label (Notifications), and Deployment Status (Deployed). Buttons for 'Edit' and 'Delete' are at the top right.

◆ Step 4: Create Tabs for Custom Objects

- Setup → Tabs → Created tabs for **Members, Contributions, Auctions, Notifications**
- Chose appropriate tab icons (User, Money, Gavel, Bell)
- Added tabs to the **Finance Management App** navigation bar

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. The left sidebar shows 'User Interface' and 'Rename Tabs and Labels'. The main area displays sections for 'Custom Tabs', 'Web Tabs', 'Visualforce Tabs', 'Lightning Component Tabs', and 'Lightning Page Tabs'. Under 'Custom Tabs', there is a table listing four tabs: Auctions (Hammer icon), Contributions (Stack of Cash icon), Members (People icon), and Notifications (Mail icon). A note states: 'Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.' Buttons for 'New' and 'What Is This?' are visible throughout the page.

◆ Step 5: Assign Profiles & Permission Sets

- Profiles:

- Admin: Full access to all objects
- Manager: Read/Edit most fields, edit Auctions & Contributions
- Agent: Create/Edit Members & Contributions, limited access to Auctions
- Member (future portal): Read-only access
- Permission Sets:
 - Created **Finance Manager Access** permission set with extended privileges
 - Assigned to Fund Manager users

Deliverables for Phase 2

- Salesforce Developer Org setup
- Finance Management System Lightning App created
- Four custom objects with fields defined
- Tabs created for navigation
- Profiles & Permission Sets configured
- Repository updated with documentation & screenshots