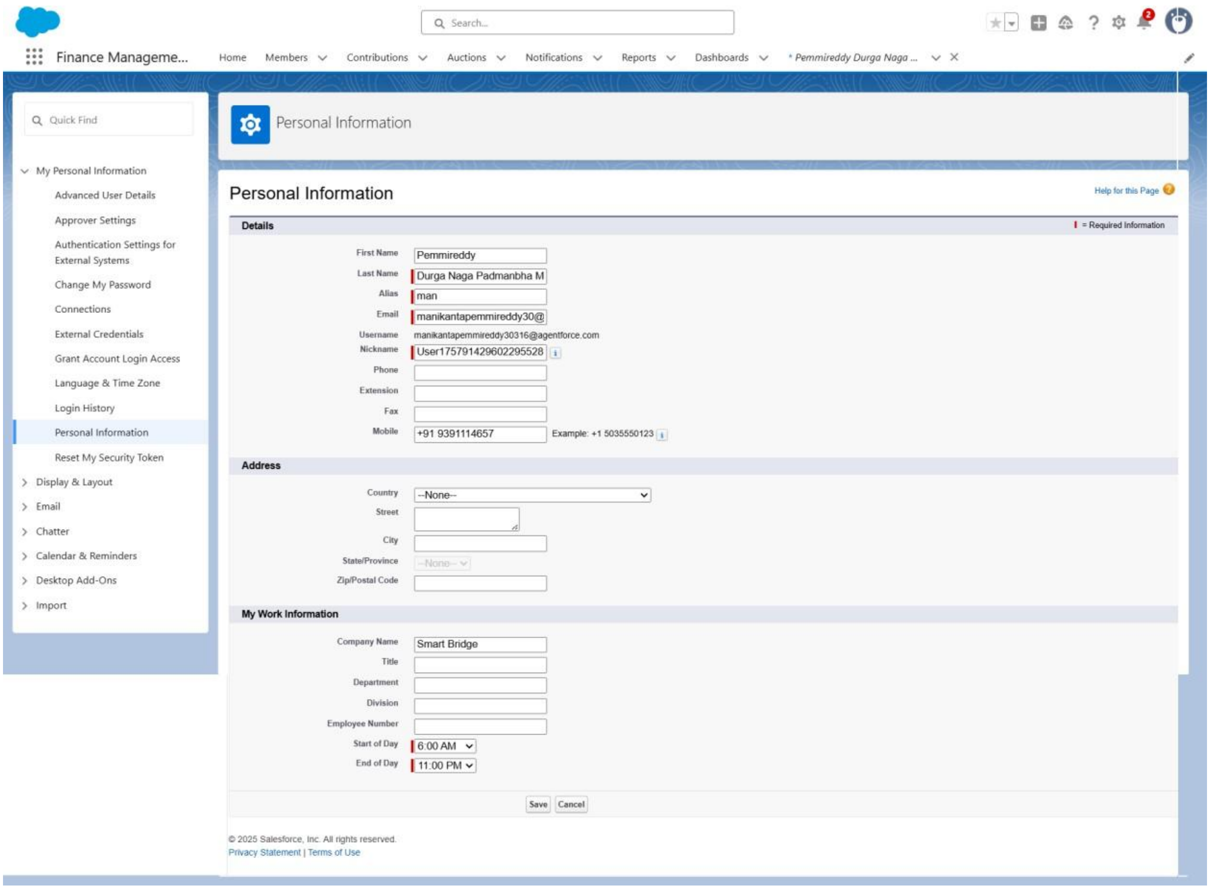
Finance Management System – Phase 2: Salesforce Org Setup & Configuration

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

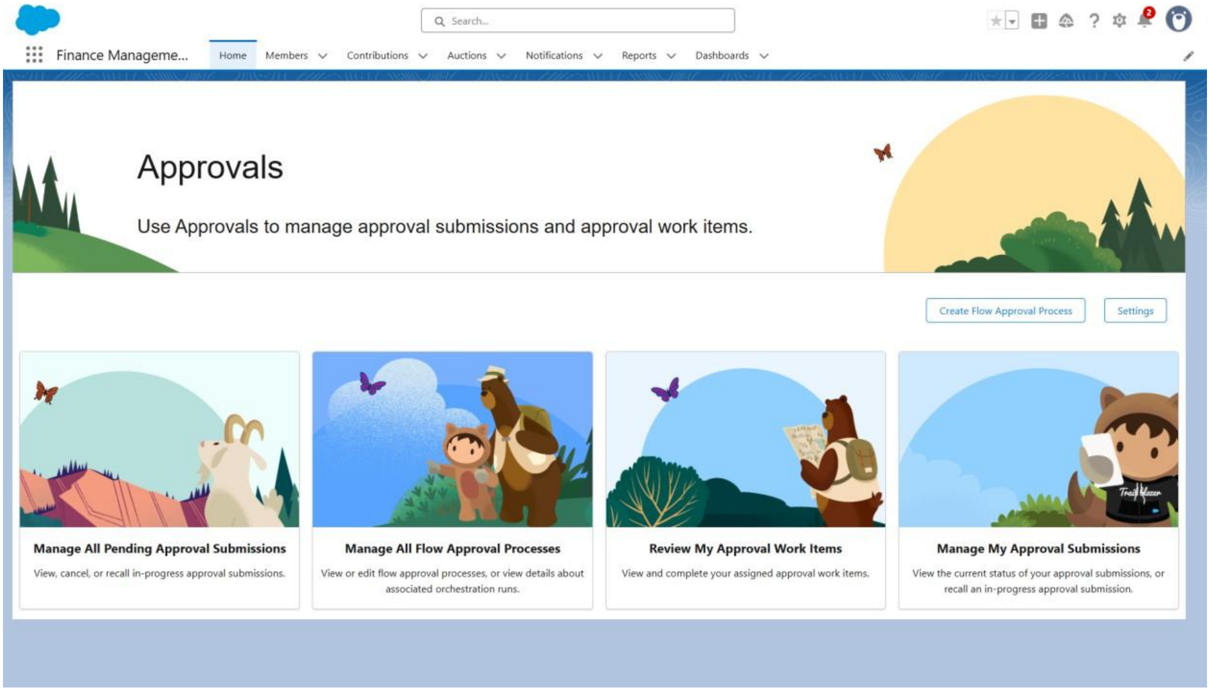
🔷 Step 1: Sign Up for Salesforce Developer Edition

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



🔷 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

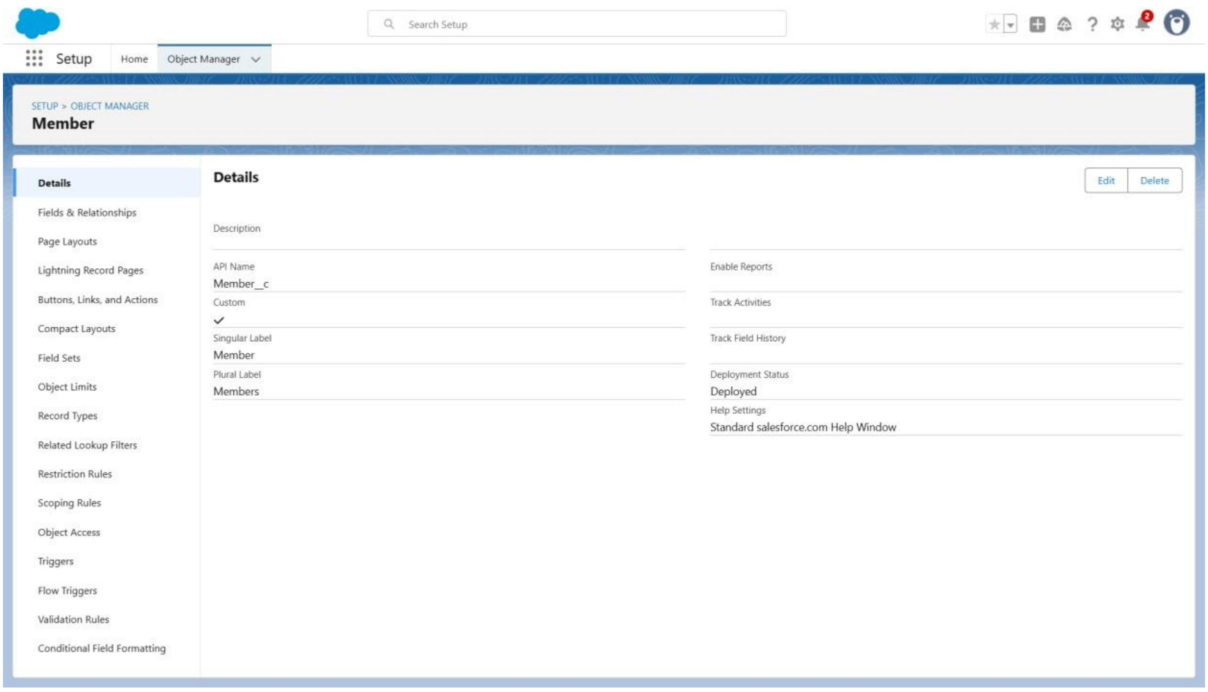


Step 3: Create Custom Objects

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

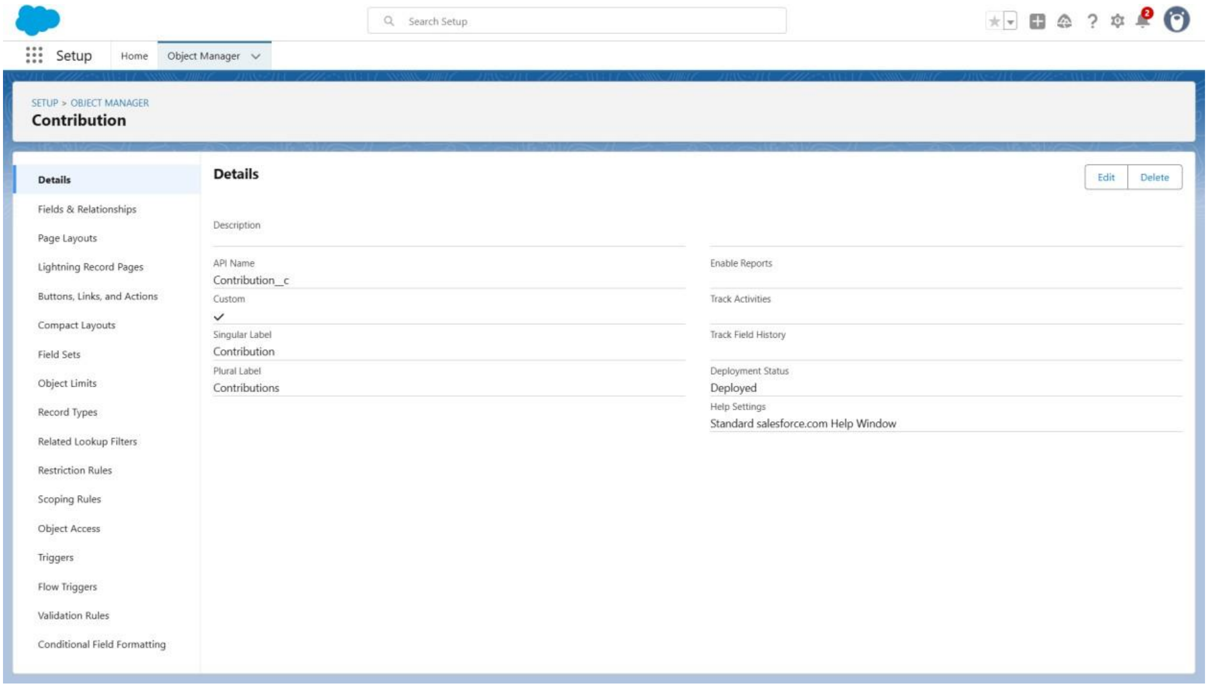
1. Member

- 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)



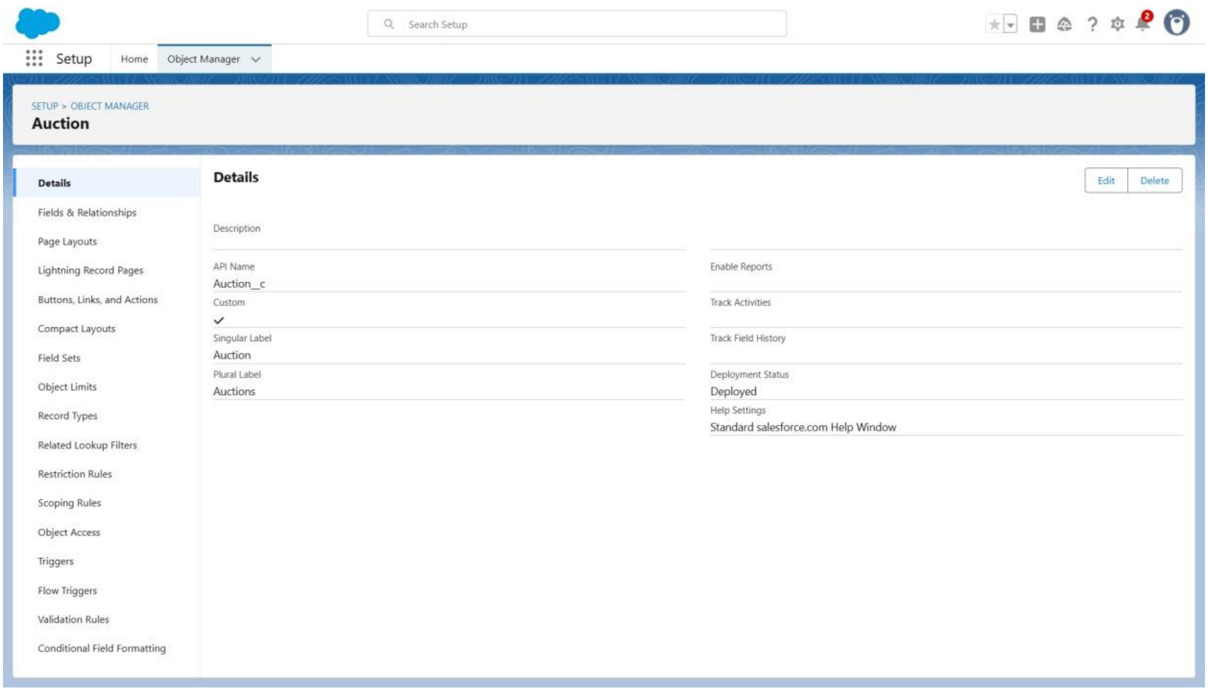
2. Contribution

- 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)



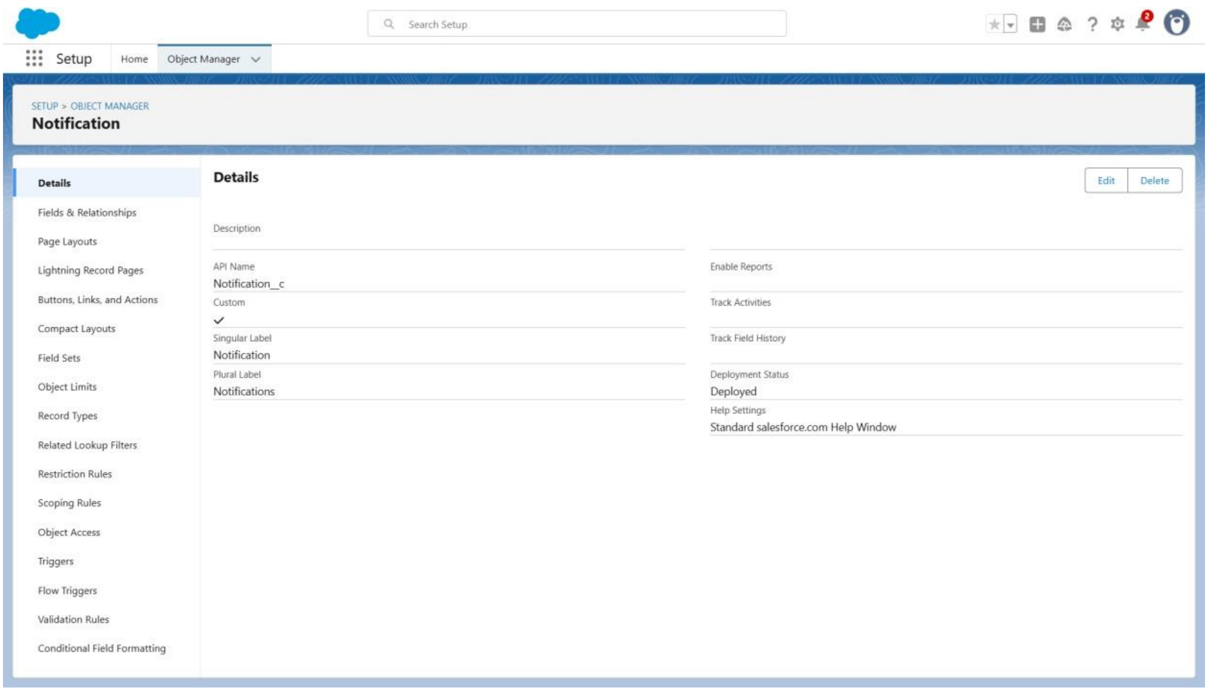
3. Auction

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



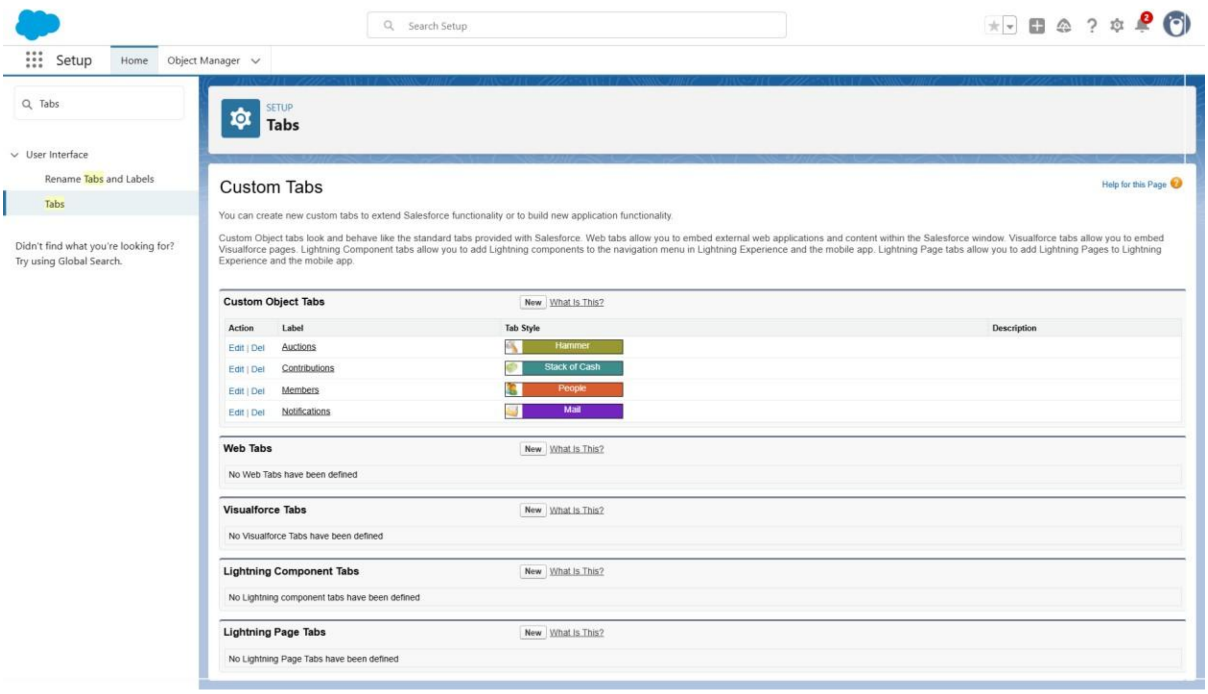
4. Notification

- 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)



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



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