

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 : manikantapemmireddy30316@agentforce.com

The screenshot shows the 'Personal Information' page in the Salesforce developer edition. The left sidebar has a 'Personal Information' section selected. The main form is titled 'Personal Information' and contains three sections: 'Details', 'Address', and 'My Work Information'. In the 'Details' section, required fields are highlighted in red. The 'Address' and 'My Work Information' sections have optional fields. At the bottom, there are 'Save' and 'Cancel' buttons. The page includes a header with a search bar and various navigation links.

Personal Information

Details

First Name	Pemmireddy
Last Name	Durga Naga Padmantha M
Alias	man
Email	manikantapemmireddy30@agentforce.com
Username	manikantapemmireddy30316@agentforce.com
Nickname	User175791429602295528
Phone	
Extension	
Fax	
Mobile	+91 9391114657

Address

Country	—None—
Street	
City	
State/Province	—None—
Zip/Postal Code	

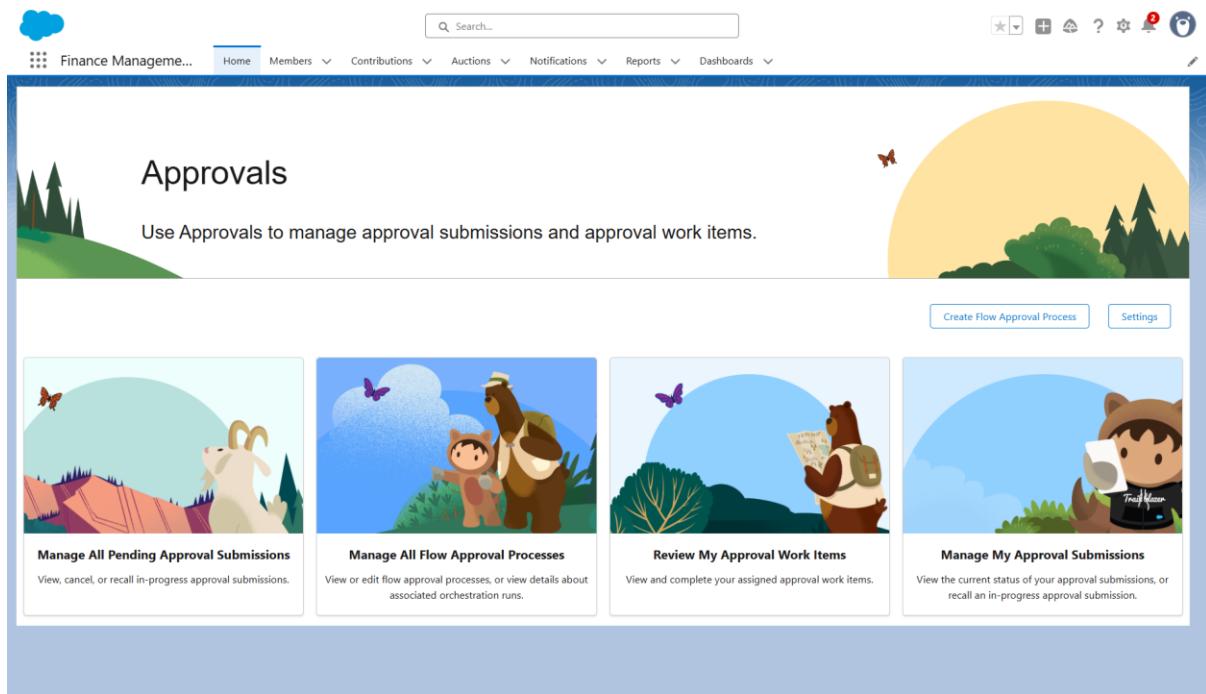
My Work Information

Company Name	Smart Bridge
Title	
Department	
Division	
Employee Number	
Start of Day	6:00 AM
End of Day	11:00 PM

Save Cancel

◆ 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, Setup, Home, Object Manager

Breadcrumbs: SETUP > OBJECT MANAGER

Section: Member

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	Member__c
Singular Label	Custom
Plural Label	Members
Enable Reports	
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	
Standard salesforce.com Help Window	

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:

Header: Search Setup, Setup, Home, Object Manager

Breadcrumbs: SETUP > OBJECT MANAGER

Section: Contribution

Left Sidebar (Details):

- Fields & Relationships
- Page Layouts
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- Object Access
- Triggers
- Flow Triggers
- Validation Rules
- Conditional Field Formatting

Right Panel (Details):

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

Buttons: 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, Setup, Home, Object Manager

Breadcrumbs: SETUP > OBJECT MANAGER

Section: Auction

Left Sidebar (Details):

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
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- 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)

◆ 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

Action	Label	Tab Style	Description
Edit Del	Auctions		
Edit Del	Contributions		
Edit Del	Members		
Edit Del	Notifications		

◆ 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