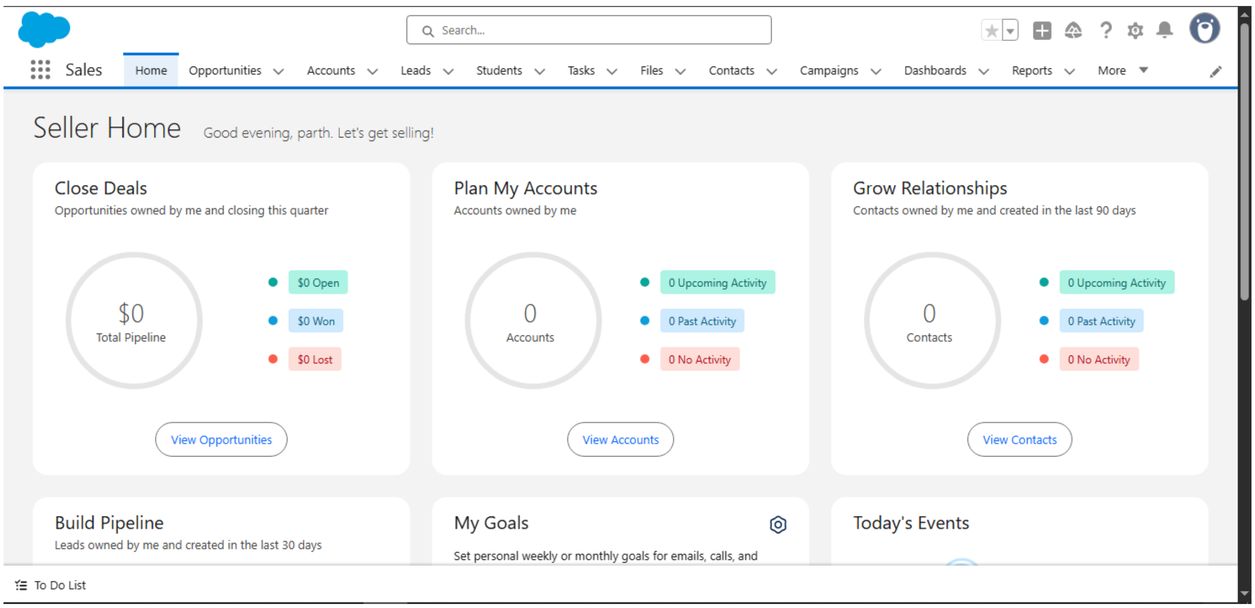
Salesforce Setup Guide: Phase 2- FitTrack Pro

This document outlines the foundational steps to configure your Salesforce org for the FitTrack Pro application.

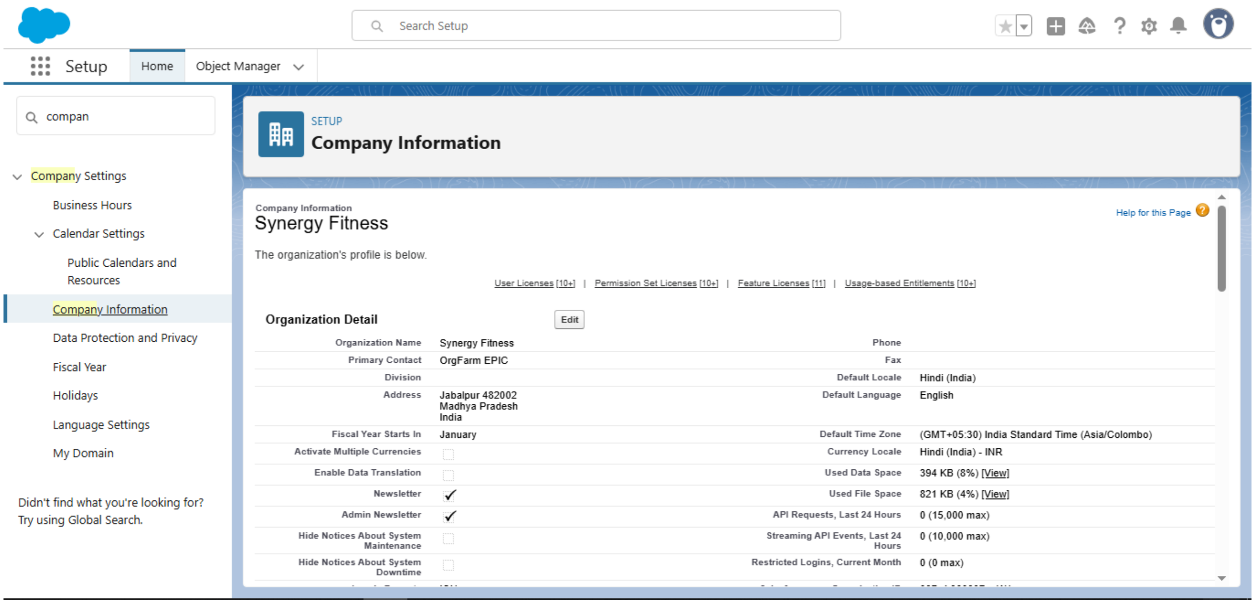
Step 1: Set Up Your Developer Org

- **Purpose:** To get a free, safe environment for building and testing the application.
- **Action:**
    1. Ensure you are logged into your Salesforce Developer Edition org.



Step 2: Configure Company Information

- **Purpose:** To set the correct name, time zone, and currency for the fictional company, "Synergy Fitness."
- **Action:**
    1. Go to **Setup** > **Company Information**.
    2. Click **Edit**.
    3. Set **Organization Name** to `Synergy Fitness`.
    4. Set your **Default Time Zone** (e.g., `(GMT+05:30) India Standard Time (Asia/Kolkata)`).
    5. Set your **Currency Locale** (e.g., `English (India) - INR`).
    6. Click **Save**.



Step 3: Define Business Hours & Holidays

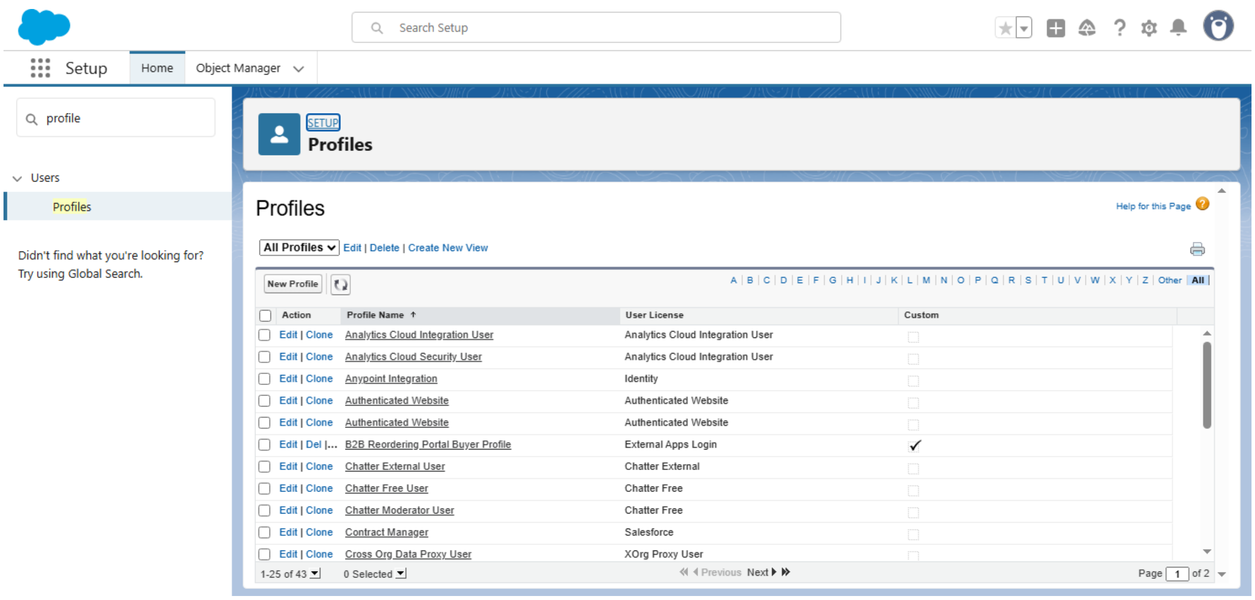
- **Purpose:** To ensure that future scheduling and reporting calculations are accurate.
- **Action:**
  1. Go to **Setup** > **Business Hours** > **New Business Hours**.
  2. Name it `Studio Operating Hours`, set the operational times (e.g., 6 AM to 9 PM, Monday-Saturday), and **Save**.
  3. Go to **Setup** > **Holidays** > **New**.
  4. Add any relevant holidays (e.g., New Year's Day).
  5. Return to your `Studio Operating Hours` record, **Edit** it, and add the holidays you created in the Holidays related list.

Step 4: Create Users

- **Purpose:** To create accounts for the different user personas who will use the app.
- **Action:**
  1. Go to **Setup** > **Users** > **New User**.
  2. Create a **Studio Manager** (e.g., "Sarah Manager"). Assign the **System Administrator** Profile for now.
  3. Create a **Trainer** (e.g., "Tom Trainer"). Assign the **Standard User** Profile for now.
  4. Create a **Front Desk Staff** member (e.g., "Frank FrontDesk"). Assign the **Standard User** Profile for now.
  5. Ensure each user has a unique username and a real email for setup.

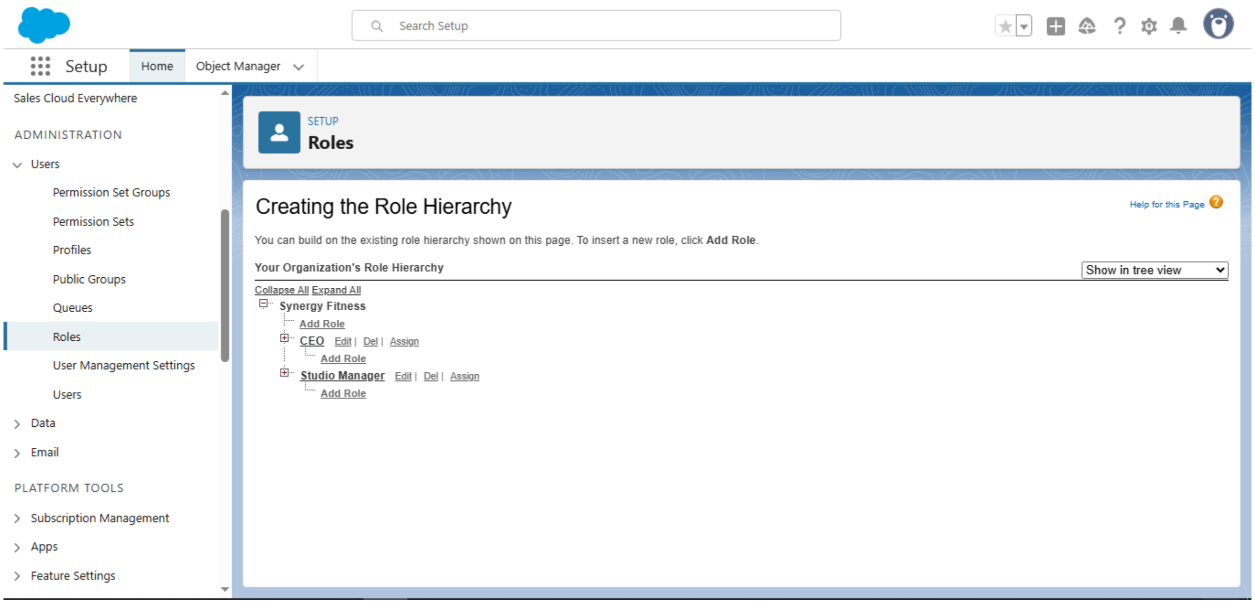
Step 5: Configure Custom Profiles

- **Purpose:** To create specific permission sets for your users.
- **Action:**
    1. Go to **Setup** > **Profiles**.
    2. **Clone** the "System Administrator" profile and name the new one `Studio Manager`.
    3. **Clone** the "Standard User" profile and name the new one `Trainer`.
    4. **Clone** the "Standard User" profile again and name it `Front Desk Staff`.
    5. Go back to **Setup** > **Users**, edit each user you created, and assign them their corresponding new custom profile.



Step 6: Establish the Role Hierarchy

- **Purpose:** To allow managers to see and report on the activities of their team members.
- **Action:**
    1. Go to **Setup** > **Roles** > **Set Up Roles**.
    2. Under your company name, **Add Role** and name it `Studio Manager`.
    3. Under the new "Studio Manager" role, **Add Role** and name it `Trainer`.
    4. Under the "Studio Manager" role again, **Add Role** and name it `Front Desk Staff`.
    5. From the role tree, click **Assign** next to each role to assign your users accordingly.



Step 7: Set Org-Wide Defaults (OWD)

- **Purpose:** To set the baseline security for your custom objects.
- **Action:**
  1. Go to **Setup** > **Sharing Settings** > **Edit**.
  2. Familiarize yourself with this page. After we create our custom objects in the next phase, we will return here and set their default internal access to **Private**.