Phase 2: Org Setup & Configuration - Gym Management System

Salesforce Editions

Different Salesforce editions (Essentials, Professional, Enterprise, Unlimited) offer varying levels of functionality. Choosing the right edition depends on gym size and complexity of operations. For a gym management system, Enterprise Edition is often suitable as it supports automation, integration, and scalability.

Company Profile Setup

The company profile in Salesforce defines basic organizational details such as company name, address, currency, default time zone, and primary contact information. For gyms with multiple branches, company profile setup ensures consistent configurations.

Business Hours & Holidays

Configuring business hours ensures accurate tracking of service availability, case escalations, and class schedules. Setting gym holidays prevents scheduling conflicts and helps manage customer expectations.

Fiscal Year Settings

The fiscal year configuration aligns the gym's financial reporting with its accounting period. Gyms may follow standard fiscal years or custom fiscal years depending on membership plans and financial cycles.

User Setup & Licenses

Users represent gym staff, trainers, and administrators. Each user needs a Salesforce license appropriate to their role. For example, managers may require full CRM access while trainers may need limited access.

Profiles

Profiles define permissions for users, controlling what data they can access and what actions they can perform. For a gym system, profiles may include Admin, Manager, Trainer, and Member roles.

Roles

Roles establish a hierarchy within the organization, determining data visibility. For example, gym owners may see all records, while trainers only see assigned members.

Permission Sets

Permission sets provide additional access beyond profile-level settings. For instance, a trainer may temporarily need reporting access without changing their entire profile.

OWD

Organization-Wide Defaults (OWD) define the baseline access level for records. For gyms, OWD might restrict member information to private, ensuring data confidentiality.

Sharing Rules

Sharing rules extend record access beyond OWD. For instance, managers may share class schedules with trainers to ensure smooth operations.

Login Access Policies

Login policies help manage security by controlling how and when users can log in. For gyms, this may include IP restrictions or time-based access.

Dev Org Setup

A Developer Org is used for building and testing gym management customizations before deployment. This allows safe experimentation without affecting live data.

Sandbox Usage

Sandboxes provide isolated environments for testing, training, and development. For gyms, this ensures that updates to class scheduling, payment modules, or dashboards are tested safely.

Deployment Basics

Deployment refers to moving changes from sandbox to production. Tools like Change Sets or Salesforce DevOps Center ensure smooth and controlled deployment of gym management features.