

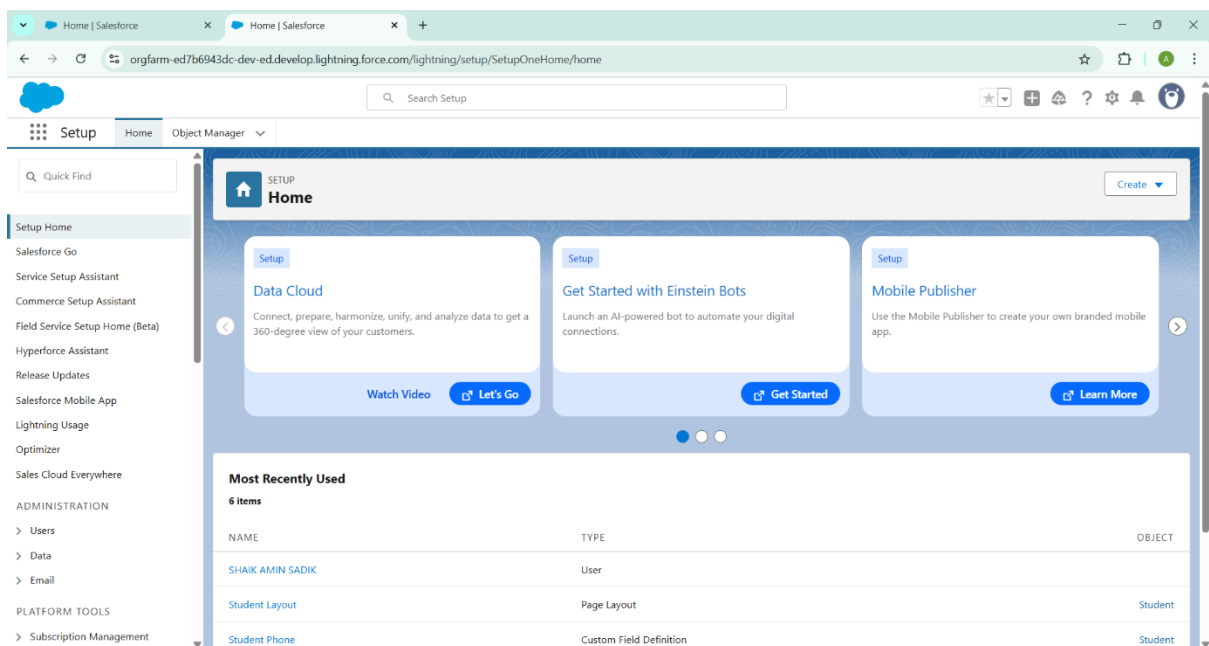
Community Fitness & Wellness Hub CRM Project

Phase 2: Org Setup & Configuration

The objective of this phase was to establish the foundational environment and security model for the project. This included configuring the Salesforce organization and setting up the user access framework.

1.Salesforce Editions: A free Salesforce Developer Edition was used as the primary build environment, providing access to all necessary tools for development and testing.

- Verified that the **Salesforce Developer Edition** is being used for this project.
- This edition provides full customization capabilities required for building the Community Fitness & Wellness Hub.



2.Company Profile Setup: The organization's profile, including name, contact information, and default time zone, was reviewed and configured to ensure an accurate and professional starting point for the project.

- Verified and updated:
 - Company name
 - Default locale, currency, time zone, and language
 - Primary contact details

SETUP

Company Information

Company Information

Community Fitness & Wellness Hub

The organization's profile is below.

[User Licenses \(10+\)](#) | [Permission Set Licenses \(10+\)](#) | [Feature Licenses \(11\)](#) | [Usage-based Entitlements \(10+\)](#)

Organization Detail

Edit

Organization Name	Community Fitness & Wellness Hub	Phone	
Primary Contact	SHAIK AMIN SADIK	Fax	
Division		Default Locale	English (India)
Address	India	Default Language	English
Fiscal Year Starts In	January	Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	English (United States) - USD
Enable Data Translation	<input type="checkbox"/>	Used Data Space	350 KB (7%) View
Newsletter	<input checked="" type="checkbox"/>	Used File Space	17 KB (0%) View
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	142 (15,000 max)
Hide Notices About System Maintenance	<input type="checkbox"/>	Streaming API Events, Last 24 Hours	0 (10,000 max)
Hide Notices About System Downtime	<input type="checkbox"/>	Restricted Logins, Current Month	0 (0 max)
Locale Formats	ICU	Salesforce.com Organization ID	00DgK000007XWOT
		Organization Edition	Developer Edition
		Instance	CAN96

Created By

OrgFarm EPI/C, 7/16/2025, 10:01 PM

Edit

Modified By

SHAIK AMIN SADIK, 9/17/2025, 7:52 AM

3. Business Hours & Holidays: Business hours and specific holidays (e.g., Christmas Day and Diwali) were defined. This demonstrates an understanding of how to manage business time, which is crucial for advanced scheduling and future automation.

SETUP

Business Hours

Organization Business Hours

Select the days and hours that your support team is available. These hours, when associated with escalation rules, determine the times at which cases can escalate.

If you enter blank business hours for a day, that means your organization does not operate on that day.

[Holidays \(2\)](#)

Business Hours Detail

Edit

Business Hours Name	Studio Business Hours	Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Business Hours	Sunday 5:30 AM to 9:00 PM Monday 5:30 AM to 9:30 PM Tuesday 5:30 AM to 9:30 PM Wednesday 5:30 AM to 9:30 PM Thursday 5:30 AM to 9:30 PM Friday 5:30 AM to 9:30 PM Saturday 5:30 AM to 9:00 PM	Default Business Hours	<input checked="" type="checkbox"/>

Active

☒

Created By

SHAIK AMIN SADIK, 9/17/2025, 8:07 AM

Edit

Last Modified By

SHAIK AMIN SADIK, 9/17/2025, 8:07 AM

Holidays

Add/Remove

Holiday Name	Description	Date and Time
Christmas Day	Happy Christmas Day to all the Meombers of Community Fitness & Wellness Hub	12/25/2025 All Day
Diwali	Happy Diwali to all the Members of Community Fitness & Wellness Hub	10/21/2025 All Day

[Back To Top](#)

Always show me [more](#) records per related list

4. Fiscal Year Settings

- Kept the standard fiscal year (January–December) as per project requirements.
- No customization required at this stage.

5. User Setup & Licenses

- User accounts for the "Studio Staff" and "Studio Manager" were created with standard Salesforce licenses. This established the foundational users for the internal application.
- Assigned available **Salesforce licenses**.

SETUP

Users

All Users

Help for this Page

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. [Let's Go](#)

View: All Users Edit Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other **All**

New User

Reset Password(s)

Add Multiple Users

<input type="checkbox"/>	Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Edit	Chatter Expert	Chatter	chatty.00d9k000007xwotua4.jgwdxvcocgjs@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Edit	EPIG_OrgFarm	OEPIC	epic.958c88c82e02@orgfarm.salesforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Edit	Manager_Studio	smana	vamsi.manager@gmail.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Edit	SADIK_SHAIKAMIN	ami	amin.shaik7604189@agentforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Edit	Staff_Studio	sstaf	anjalidevi.staff@gmail.com		<input checked="" type="checkbox"/>	Standard User
<input type="checkbox"/>	Edit	User_Integration	integ	integration@00d9k000007xwotua4.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	Edit	User_Security	sec	insightssecurity@00d9k000007xwotua4.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

New User

Reset Password(s)

Add Multiple Users

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other **All**

6.Profiles

- Standard profiles were utilized as the baseline for user permissions, aligning with modern best practices to manage granular access through Permission Sets.

7.Roles

- A clear role hierarchy was defined, with a "Studio Owner" role above a "Trainer / Staff" role, ensuring proper data visibility and reporting.
- Role assignments for custom records will be finalized in **Phase 3**.

SETUP

Roles

Creating the Role Hierarchy

Help for this Page

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

Your Organization's Role Hierarchy

Collapse All

Expand All

Show in tree view

Community Fitness & Wellness Hub

Add Role

CEO

Edit

Del

Assign

Add Role

CFO

Edit

Del

Assign

Add Role

COO

Edit

Del

Assign

Add Role

Studio Owner

Edit

Del

Assign

Add Role

Studio Manager

Edit

Del

Assign

Add Role

Trainer / Staff

Edit

Del

Assign

Add Role

SVP Customer Service & Support

Edit

Del

Assign

Add Role

SVP Human Resources

Edit

Del

Assign

Add Role

SVP Sales & Marketing

Edit

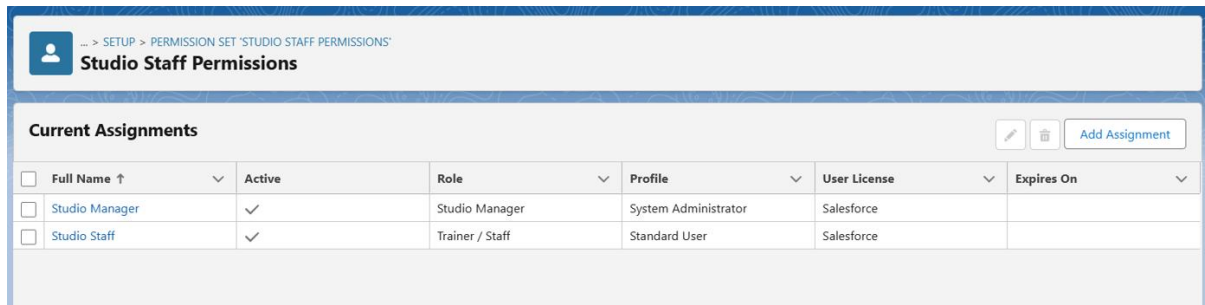
Del

Assign

8.Permission Sets

- A custom permission set was created to manage granular permissions for the project's custom objects. This modern approach ensures a flexible and scalable security model.
- Created a basic **Permission Set** for granting extra access without changing profiles.

- Specific permissions (like booking classes, loyalty tracking) will be implemented in **Phase 3** once custom objects exist.



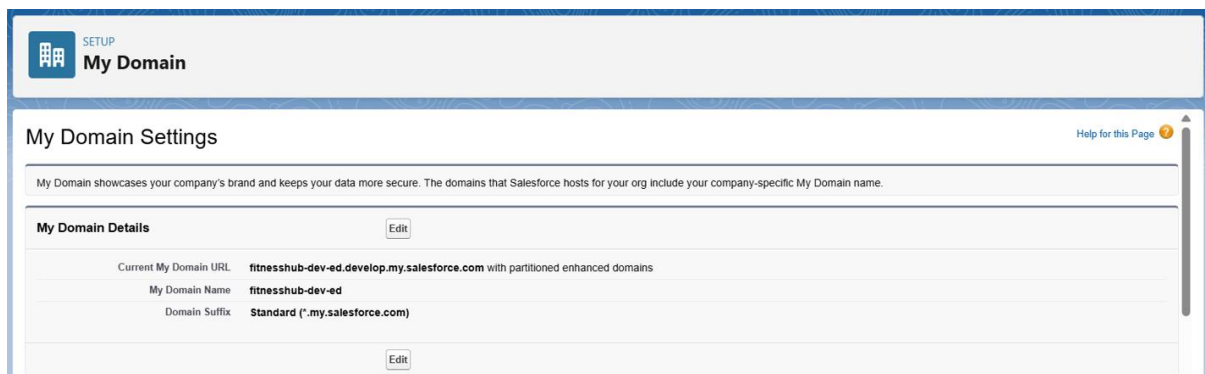
The screenshot shows the 'Studio Staff Permissions' page in a Salesforce setup environment. The breadcrumb trail is '... > SETUP > PERMISSION SET "STUDIO STAFF PERMISSIONS"'. The page title is 'Studio Staff Permissions'. Below the title is a section for 'Current Assignments' with a table listing permissions for 'Studio Manager' and 'Studio Staff'. The table has columns for 'Full Name', 'Active', 'Role', 'Profile', 'User License', and 'Expires On'. There are also buttons for 'Add Assignment' and 'Add Assignment'.

Full Name	Active	Role	Profile	User License	Expires On
Studio Manager	✓	Studio Manager	System Administrator	Salesforce	
Studio Staff	✓	Trainer / Staff	Standard User	Salesforce	

9.OWD (Organization-Wide Defaults): This was not implemented in Phase 2. **OWD will be configured in Phase 3** after custom objects have been created. This is a critical step to ensure data privacy by setting the baseline access to private.

10.My Domain

- A unique 'My Domain' was registered and deployed, which is a prerequisite for many advanced Lightning features and branding.



The screenshot shows the 'My Domain Settings' page in a Salesforce setup environment. The breadcrumb trail is 'SETUP > My Domain'. The page title is 'My Domain Settings'. Below the title is a section for 'My Domain Details' with a table showing the current My Domain URL, My Domain Name, and Domain Suffix. There are 'Edit' buttons for each row.

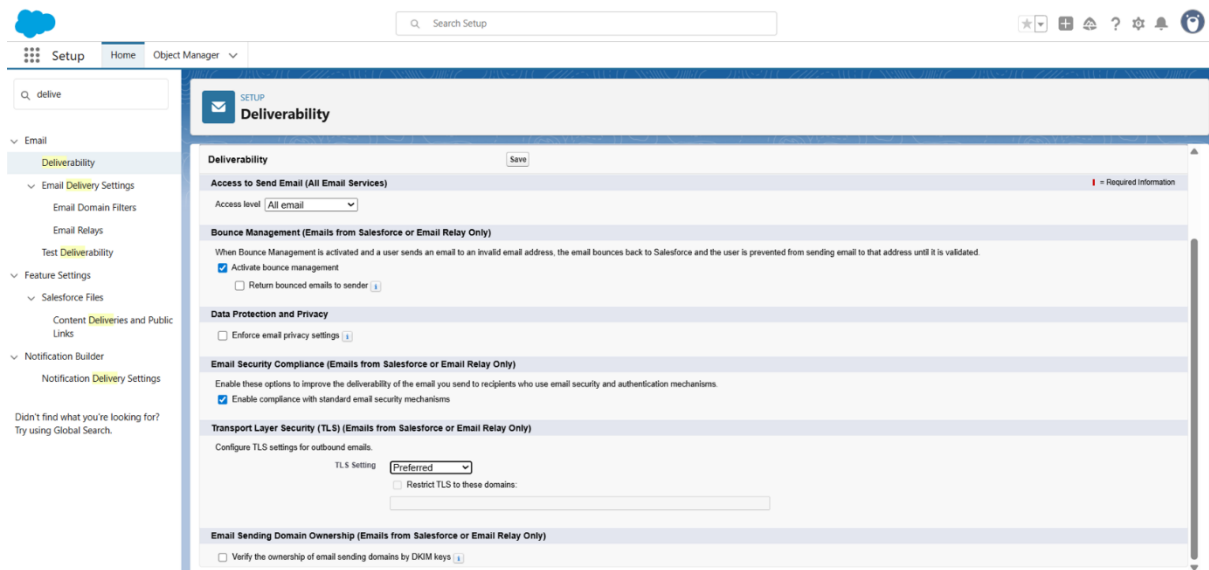
My Domain Details	Edit
Current My Domain URL	fitnesshub-dev-ed.develop.my.salesforce.com with partitioned enhanced domains
My Domain Name	fitnesshub-dev-ed
Domain Suffix	Standard (*.my.salesforce.com)

11.Sharing Rules: This was not implemented in Phase 2. **Sharing rules will be implemented in Phase 3** to selectively open up data that is restricted by the OWD settings. For example, a sharing rule will be created to allow a trainer to see only the bookings for their classes.

12.Login Access Policies: This was not implemented. Login and password policies were reviewed, but left at their defaults, as they are not necessary for a single-user development environment.

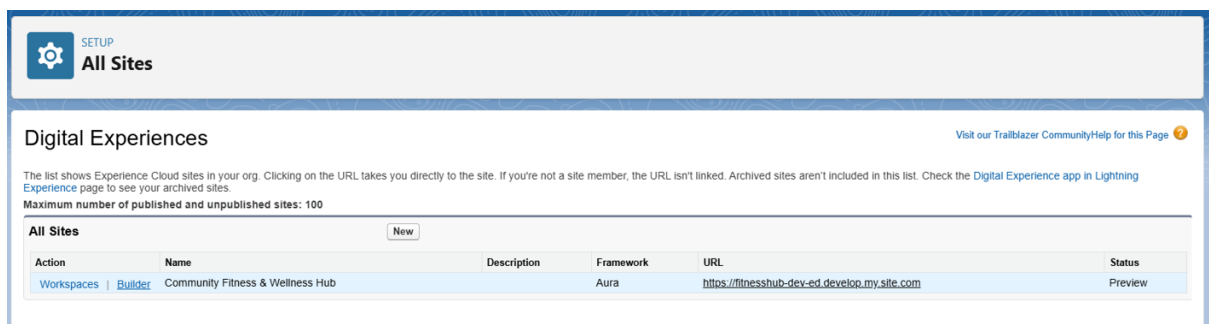
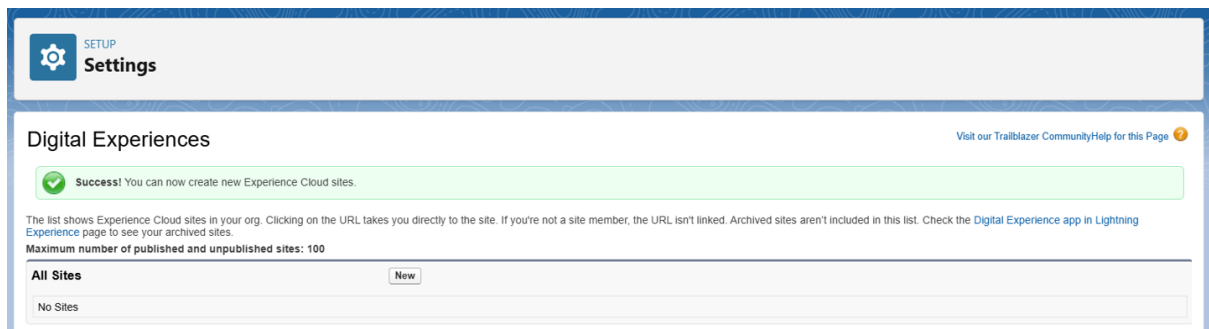
13.Email Configuration

- The email deliverability settings were set to "All email," and an organization-wide email address was configured and verified. This ensures all automated system communications are professional and reliable.



14.Experience Cloud

- Experience Cloud was enabled to explore the possibility of building a public-facing member portal. A basic site was created to demonstrate an understanding of this technology.



15.Sandbox Usage

- This was not implemented as a separate sandbox is not available in a Developer Edition. The documentation will explain that in a real-world scenario, a developer sandbox would be used for building and testing before deploying to production.

16.Dev Org Setup & Deployment Basics

- Confirmed that all development will be done in a **Developer Org** environment.
- This was not implemented in this phase. The **deployment strategy will be discussed and implemented in Phase 8**, where the project will be prepared for a real-world rollout.