

Community Fitness & Wellness Hub CRM Project

Target Users:- Members (The Customers), Studio Staff / Trainers, Management & Studio Owner.

Problem Statement

The client, a local fitness studio with multiple locations, is facing significant operational challenges manual processes. The current system relies on a mix of spreadsheets, calendars, and phone calls to manage key business activities. This Results in:

- **Inefficient Operations:** Class bookings, trainer scheduling, and member communication are handled manually, causing delays and frequent errors. This results in double-booked classes and missed appointments.
- **Poor Member Experience:** Customers are frustrated by the lack of a simple, online booking system and inconsistent communication regarding class details and updates. The absence of a structured loyalty program also fails to encourage repeat visits.
- **Lack of Business Insight:** Management lacks real-time data on class popularity, member attendance, and trainer performance, hindering their ability to make data-driven decisions.
- **No Engagement Strategy:** There is no structured loyalty or rewards program to retain and motivate members.

To address these challenges, the goal is to implement a Salesforce-based platform that will serve as a single source of truth. The solution will centralize all member and class management activities, automating key processes to enhance operational efficiency, improve the overall member experience, and provide clear business insights through powerful dashboards and reports.

Phase 1: Problem Understanding & Industry Analysis

Goal: Understand what we're building and why.

1. Requirement Gathering

Based on initial discussions with key stakeholders, the following functional requirements have been identified for the platform:

- **Member Experience:**
 - The system must allow members to view available classes, filter by date, time, trainer, and class type.
 - Members must be able to securely book and cancel a spot in a class online.
 - The system must automatically send an email confirmation upon booking and a reminder email 24 hours prior to the class.
 - The system must allow members to track their current loyalty points.
- **Operational Efficiency:**
 - Studio staff and trainers must be able to create, edit, and manage Class and Trainer records.
 - Staff must have a centralized view of all class bookings and member attendance for a given day.
 - The system must track member loyalty points based on class attendance.
- **Management & Reporting:**
 - Management must be able to view dashboards showing key performance indicators (KPIs) such as class attendance rates and total active members.
 - The system must generate reports on class popularity, top-performing trainers, and member loyalty.

2. Stakeholder Analysis

Three primary stakeholder groups have been identified, each with unique roles and needs that the solution must address:

- **Members (End-Users):**
 - Role: The customers of the fitness studio.
 - Needs: A seamless, user-friendly experience for booking classes and a transparent view of their engagement and loyalty.
- **Studio Staff/Trainers (Internal Users):**
 - Role: The administrators who will use the system daily to manage operations.
 - Needs: A simple, efficient interface to manage schedules, track attendance, and resolve member issues.

- **Admins:**
 - Configure the Salesforce platform, manage permissions, and ensure smooth operations.
- **Management/Studio Owner (Business Sponsors):**
 - Role: The decision-makers who need to analyze business performance and ROI.
 - Needs: Clear, real-time insights into operational metrics to drive strategic planning and growth.

3. Business Process Mapping

A critical step is mapping the current manual processes ("As-Is") and defining the future, automated processes ("To-Be").

- **As-Is Process (Manual):**
 - A member calls the studio to book a class. A staff member manually enters the booking into a spreadsheet. No automated confirmation is sent, and class reminders are often forgotten.
 - Payments and attendance are tracked manually, often leading to errors.
- **To-Be Process (Automated):**
 - A member books a class via an online form (Salesforce Flow). A Class Booking record is automatically created in Salesforce. The system sends an instant email confirmation and a scheduled reminder email the day before the class. The class roster is automatically updated in real-time.
 - Payments and loyalty points are automatically tracked.
 - Managers see real-time data via dashboards.

4. Industry-specific Use Case Analysis

The fitness and wellness industry presents unique requirements that a standard CRM must be adapted to handle. Our solution will specifically address:

- **Class Capacity Management:** The system must prevent overbooking by ensuring that the number of Class Booking records does not exceed the Class capacity.
- **Member Loyalty & Retention:** The system must include a mechanism to track and update Loyalty Points for members who attend classes, which is crucial for fostering long-term engagement.
- **B2C-First Approach:** The primary user interface for bookings will be a public-facing portal or form, designed specifically for the customer's convenience, prioritizing an intuitive user experience.

5. AppExchange Exploration

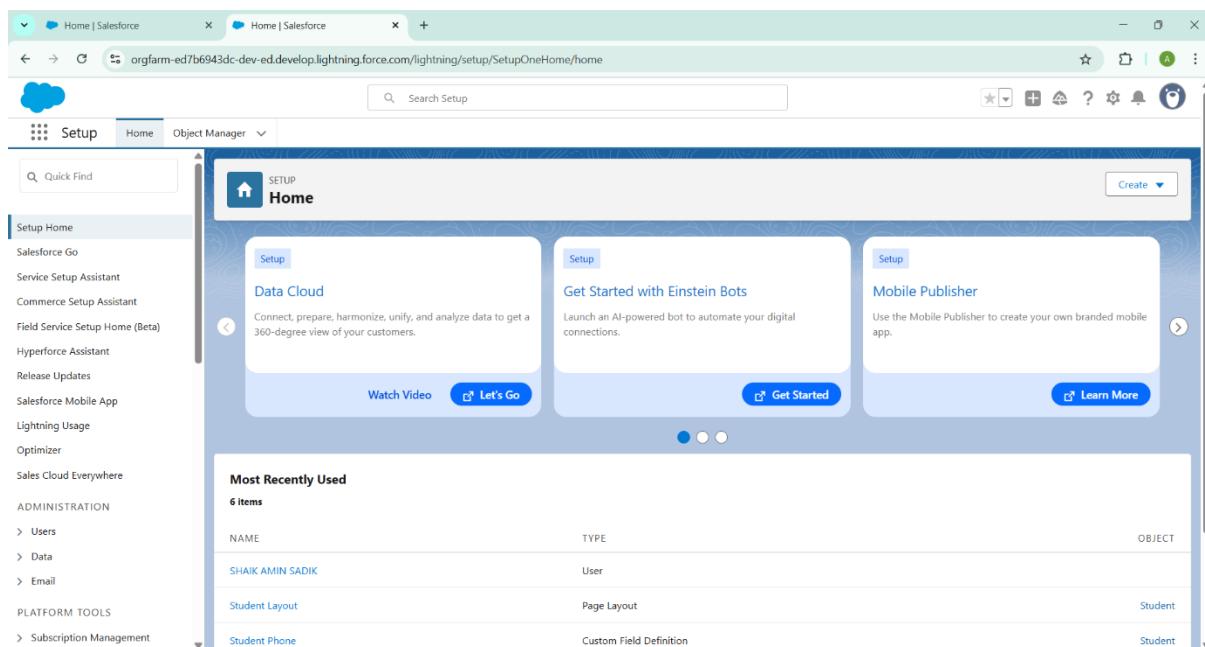
Existing solutions on Salesforce AppExchange (such as scheduling tools and loyalty apps) provide useful reference points. However, this project focuses on building a custom native solution to demonstrate Salesforce platform capabilities including custom objects, flows, automation, and dashboards.

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

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

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 checked="" 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 EPIC](#) 7/16/2025, 10:01 PM Modified By [SHAIK AMIN SADIK](#) 9/17/2025, 7:52 AM

[Edit](#)

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

Business Hours Name	Studio Business Hours	Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)																												
Business Hours	<table border="1"> <tbody> <tr> <td>Sunday</td> <td>5:30 AM to 9:00 PM</td> <td>Default Business Hours</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Monday</td> <td>5:30 AM to 9:30 PM</td> <td></td> <td></td> </tr> <tr> <td>Tuesday</td> <td>5:30 AM to 9:30 PM</td> <td></td> <td></td> </tr> <tr> <td>Wednesday</td> <td>5:30 AM to 9:30 PM</td> <td></td> <td></td> </tr> <tr> <td>Thursday</td> <td>5:30 AM to 9:30 PM</td> <td></td> <td></td> </tr> <tr> <td>Friday</td> <td>5:30 AM to 9:30 PM</td> <td></td> <td></td> </tr> <tr> <td>Saturday</td> <td>5:30 AM to 9:00 PM</td> <td></td> <td></td> </tr> </tbody> </table>	Sunday	5:30 AM to 9:00 PM	Default Business Hours	<input checked="" type="checkbox"/>	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				
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Created By	SHAIK AMIN SADIK 9/17/2025, 8:07 AM	Last Modified By	SHAIK AMIN SADIK 9/17/2025, 8:07 AM																												

[Edit](#)

Holidays

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

[Add/Remove](#)

[^ 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**.

All Users

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](#)

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatty.00dgk000007xwotua4.lqwdxvcocgs@chatter.salesforce.com		✓	Chatter Free User
Edit	OEPICT	OEPICT	epic.958c88c82e02@orgfarm.salesforce.com		✓	System Administrator
Edit	Manager_Studio	smana	vamsi.manager@gmail.com		✓	System Administrator
Edit	SADIK_SHAIK_AMIN	ami	amin.shak7604189@agentforce.com		✓	System Administrator
Edit	Staff_Studio	sstar	anjaliadevi.staff@gmail.com		✓	Standard User
Edit	User_Integration	integ	integration:@00dgk000007xwotua4.com		✓	Analytics Cloud Integration User
Edit	User_Security	sec	insightssecurity@00dgk000007xwotua4.com		✓	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**.

Creating the Role Hierarchy

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
          +-- Add Role
    
```

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.

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.

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.

The screenshot shows the Salesforce Setup interface with the 'Deliverability' section selected. The main content area displays various configuration options under categories like 'Access to Send Email', 'Bounce Management', 'Data Protection and Privacy', 'Email Security Compliance', and 'Transport Layer Security (TLS)'. A sidebar on the left lists other setup categories such as Email, Feature Settings, and Notification Builder.

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.

The screenshot shows the 'Digital Experiences - All Sites' page in the Salesforce Setup. It displays a success message: 'Success! You can now create new Experience Cloud sites.' Below this, it lists one site: 'Community Fitness & Wellness Hub'. There is a note about the maximum number of published and unpublished sites (100).

This screenshot is identical to the one above, showing the 'Digital Experiences - All Sites' page with the same site listed and the same note about the maximum number of sites.

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.

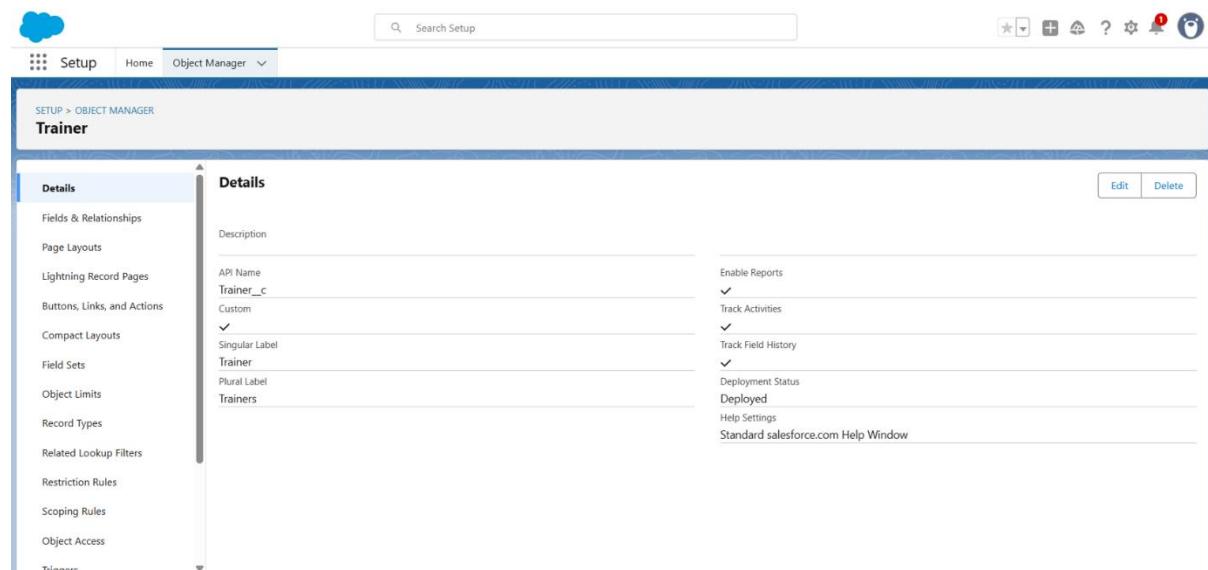
16.Dev Org Setup & Deployment Basics

- 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.

Phase 3: Data Modeling & Relationships

1.Standard & Custom Objects

The project utilized the standard Contact object to represent members. Five custom objects were created to support the core functionality: Trainer, Class, Class Booking, Payments, and Loyalty Points.



The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'SETUP > OBJECT MANAGER' followed by 'Trainer'. On the left, a sidebar lists various object settings: 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, and Object Access. The 'Details' tab is selected. The main content area displays the 'Details' section for the Trainer object. It includes fields for 'Description' (empty), 'API Name' (set to 'Trainer__c'), 'Custom' (checkbox checked), 'Singular Label' (set to 'Trainer'), and 'Plural Label' (set to 'Trainers'). To the right, there are sections for 'Enable Reports' (checkbox checked), 'Track Activities' (checkbox checked), 'Track Field History' (checkbox checked), 'Deployment Status' (set to 'Deployed'), 'Help Settings' (link to 'Standard salesforce.com Help Window'), and a 'Help' button. At the bottom right are 'Edit' and 'Delete' buttons.

The **Trainer** object was created to store all information about the studio's trainers.

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. A new object named 'Class' is being created. The 'Details' tab is selected, showing the following configuration:

- Description:** API Name: Class_c
- Custom:** ✓
- Singular Label:** Class
- Plural Label:** Classes
- Enable Reports:** ✓
- Track Activities:** ✓
- Track Field History:** ✓
- Deployment Status:** Deployed
- Help Settings:** Standard salesforce.com Help Window

The left sidebar lists various object settings: 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, and Triggers.

The **Class** custom object was created to manage all classes offered by the studio.

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. A new object named 'Class Booking' is being created. The 'Details' tab is selected, showing the following configuration:

- Description:** API Name: Class_Booking_c
- Custom:** ✓
- Singular Label:** Class Booking
- Plural Label:** Class Bookings
- Enable Reports:** ✓
- Track Activities:** ✓
- Track Field History:** ✓
- Deployment Status:** Deployed
- Help Settings:** Standard salesforce.com Help Window

The left sidebar lists various object settings: 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, and Triggers.

The **Class Booking** custom object was created to track each member's booking.

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. A new object named 'Loyalty Points' is being created. The 'Details' tab is selected, showing the following configuration:

- Description:** API Name: Loyalty_Points_c
- Custom:** ✓
- Singular Label:** Loyalty Points
- Plural Label:** Loyalty Points
- Enable Reports:** ✓
- Track Activities:** ✓
- Track Field History:** ✓
- Deployment Status:** Deployed
- Help Settings:** Standard salesforce.com Help Window

The left sidebar lists various object settings: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters.

The **Loyalty Points** custom object was created to manage the member engagement program.

The screenshot shows the Salesforce Setup interface under the Object Manager. A sidebar on the left lists various object configuration options like Fields & Relationships, Page Layouts, and Buttons, Links, and Actions. The main pane displays the 'Payment' object's details. It includes fields for Description, API Name (Payment__c), Singular Label (Payment), Plural Label (Payments), and several checkboxes for deployment status (Enable Reports, Track Activities, Track Field History) and help settings. Buttons for Edit and Delete are at the top right.

The **Payments** custom object was created to manage all payment records.

2. Record Types

Record types were not implemented in this phase. The project utilized the default record type to maintain a simple, focused, and efficient data model.

3. Fields

Custom fields were created on each object to capture project-specific data. Examples include a Start Date/Time field on the Class object, a Status picklist on the Class Booking object, and a Points Earned number field on the Loyalty Points object.

The screenshot shows the Salesforce Setup interface under the Object Manager. The 'Trainer' object is selected. On the left, a sidebar lists various field-related configurations. The main pane shows the 'Specialty' custom field definition for the 'Trainer' object. It includes sections for Field Information (Field Label: Specialty, Field Name: Specialty__c, Data Type: Picklist), General Options (Required: unchecked, Default Value: blank), and Picklist Options (Restrict picklist to values defined in the value set: checked). Buttons for Edit, Set Field Level Security, View Field Accessibility, and Where is this used? are available at the top right.

A **Picklist field** named 'Specialty' was created on the Trainer object.

The screenshot shows the Salesforce Setup interface for the Trainer object. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The main area displays the 'Years of Experience' custom field definition. The field information includes:

Field Label	Field Name	Object Name
Years of Experience	Years_of_Experience	Trainer
	API Name	Data Type
	Years_of_Experience__c	Number

General Options include Required (unchecked), Unique (unchecked), External ID (unchecked), AI Prediction (unchecked), and Default Value (empty). The field was created by Amin Sadik Shaik on 9/23/2025, 12:32 AM, and modified by the same user on the same date.

A Number field for 'Years of Experience' was created on the Trainer object.

The screenshot shows the Salesforce Setup interface for the Trainer object. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The main area displays the 'Biography' custom field definition. The field information includes:

Field Label	Field Name	Object Name
Biography	Biography	Trainer
	API Name	Data Type
	Biography__c	Long Text Area

General Options include Default Value (empty). Long Text Area Options show # Visible Lines set to 10 and Length set to 32,768. The field was created by Amin Sadik Shaik on 9/23/2025, 12:34 AM, and modified by the same user on the same date.

A Long Text Area field for 'Biography' was created on the Trainer object.

The screenshot shows the Salesforce Setup interface with the URL fitnesshub-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgK000002Px0X/FieldsAndRelationships/00NgK00001r8NR/view. The page title is "Class". The left sidebar under "Fields & Relationships" is selected. The main content area shows a custom field named "Start Date/Time" with the following details:

Field Label	Start Date/Time	Object Name	Class
Field Name	Start_Date_Time	Data Type	Date/Time
API Name	Start_Date_Time_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Amin.Sadik.Shakir 9/23/2025, 12:37 AM	Modified By	Amin.Sadik.Shakir 9/23/2025, 12:37 AM
General Options			
Required	<input type="checkbox"/>		
Default Value			
Validation Rules	New	Validation Rules Help ?	
No validation rules defined.			

A Date/Time field named 'Start Date/Time' was created on the Class object.

The screenshot shows the Salesforce Setup interface with the URL fitnesshub-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgK000002Px0X/FieldsAndRelationships/00NgK00001r8H0/view. The page title is "Class". The left sidebar under "Fields & Relationships" is selected. The main content area shows a custom field named "Capacity" with the following details:

Field Label	Capacity	Object Name	Class
Field Name	Capacity	Data Type	Number
API Name	Capacity__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Amin.Sadik.Shakir 9/23/2025, 12:39 AM	Modified By	Amin.Sadik.Shakir 9/23/2025, 12:39 AM
General Options			
Required	<input type="checkbox"/>		
Unique	<input type="checkbox"/>		
External ID	<input type="checkbox"/>		
AI Prediction	<input type="checkbox"/>		
Default Value			

A Number field named 'Capacity' was created on the Class object.

The screenshot shows the Salesforce Setup interface under the Object Manager. A custom field named 'Description' is being created for the 'Class' object. The field is defined as a Long Text Area type, with a length of 32,768 characters. It has a default value of 3 visible lines. The field was created by Amin.Sadik.Shalk on 9/23/2025, 12:40 AM.

A Long Text Area field for 'Description' was created on the Class object.

The screenshot shows the Salesforce Setup interface under the Object Manager. A custom field named 'Status' is being created for the 'Class Booking' object. The field is defined as a Picklist type, with a required status. It has a default value of 'Available'. The field was created by Amin.Sadik.Shalk on 9/23/2025, 12:43 AM.

A Picklist field named 'Status' was created on the Class Booking object.

The screenshot shows the Salesforce Setup interface under the Object Manager. A custom field named 'Amount' has been created on the 'Payment' object. The field is defined as a Currency type with a length of 16 and 2 decimal places. It was created by Amin.Sadik.Shaiq on 9/23/2025 at 12:45 AM.

Custom Field Definition Detail

Field Label	Amount	Object Name	Payment
Field Name	Amount	Data Type	Currency
API Name	Amount__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Amin.Sadik.Shaiq 9/23/2025, 12:45 AM	Modified By	Amin.Sadik.Shaiq 9/23/2025, 12:45 AM

A Currency field named 'Amount' was created on the Payments object.

The screenshot shows the Salesforce Setup interface under the Object Manager. A picklist field named 'Status' has been created on the 'Payment' object. It was created by Amin.Sadik.Shaiq on 9/23/2025 at 12:47 AM.

Custom Field Definition Detail

Field Label	Status	Object Name	Payment
Field Name	Status	Data Type	Picklist
API Name	Status__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Amin.Sadik.Shaiq 9/23/2025, 12:47 AM	Modified By	Amin.Sadik.Shaiq 9/23/2025, 12:47 AM

A Picklist field named 'Status' was created on the Payments object.

Loyalty Points Custom Field
Points Earned

Custom Field Definition Detail

Field Label	Field Name	Object Name
Points Earned	Points_Earned	Loyalty_Points
API Name	Points_Earned_c	Data Type
Description		
Help Text		
Data Owner		
Field Usage		
Data Sensitivity Level		
Compliance Categorization		
Created By	Amin.Sadik.Shaik	Modified By
	9/23/2025, 12:48 AM	9/23/2025, 12:48 AM

General Options

- Required:
- Unique:
- External ID:
- AI Prediction:
- Default Value:

A Number field named 'Points Earned' was created on the Loyalty Points object.

Loyalty Points Custom Field
Loyalty Date

Custom Field Definition Detail

Field Label	Field Name	Object Name
Loyalty Date	Loyalty_Date	Loyalty_Points
API Name	Loyalty_Date__c	Data Type
Description		
Help Text		
Data Owner		
Field Usage		
Data Sensitivity Level		
Compliance Categorization		
Created By	Amin.Sadik.Shaik	Modified By
	9/23/2025, 12:50 AM	9/23/2025, 12:50 AM

General Options

- Required:
- Default Value:

Validation Rules

No validation rules defined.

A Date field named 'Loyalty Date' was created on the Loyalty Points object.

4. Compact Layouts

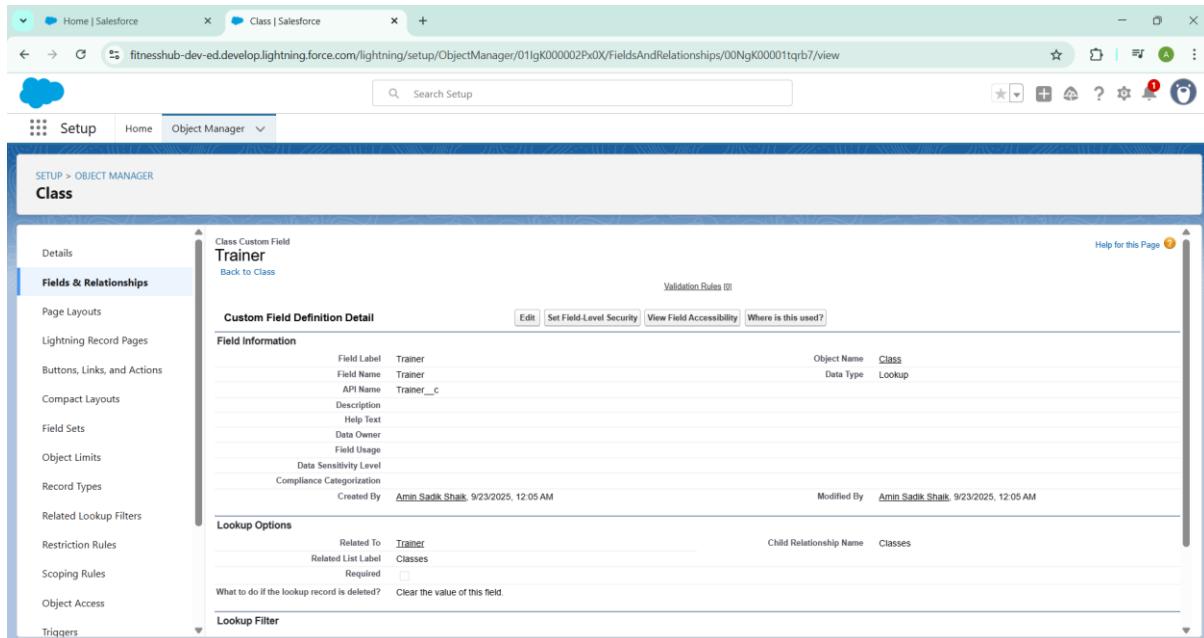
Custom compact layouts were configured for each object. These layouts display the most critical information in the highlights panel at the top of a record, allowing for quick and efficient data consumption.

5. Junction Objects

The Class Booking custom object was designed to function as a **junction object**. It connects the Class object and the Contact object, allowing a member to be associated with multiple classes, and a class to have multiple members.

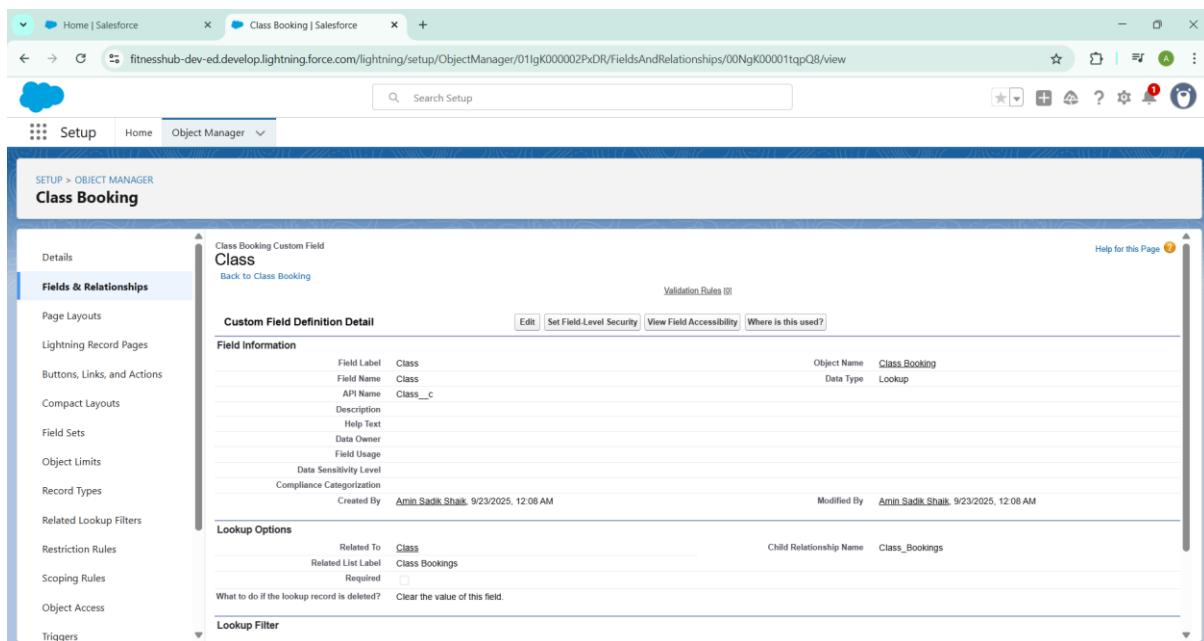
6. Lookup vs Master-Detail vs Hierarchical Relationships

- Lookup relationships were used to connect all custom objects. This was a strategic choice to ensure a flexible data model where related records can be linked without strict ownership requirements, preventing cascading deletions and supporting multiple business processes.



The screenshot shows the Salesforce Object Manager interface. A custom field named 'Trainer' is being edited for the 'Class' object. The 'Fields & Relationships' tab is selected. The 'Field Information' section shows the field label 'Trainer', field name 'Trainer', and API name 'Trainer_c'. The 'Data Type' is listed as 'Lookup'. The 'Lookup Options' section indicates the field is related to the 'Trainer' object, with a child relationship name 'Classes'. The 'Object Name' is 'Class'.

A **Lookup relationship** was created on the Class object to link it to a specific Trainer.



The screenshot shows the Salesforce Object Manager interface. A custom field named 'Class' is being edited for the 'Class Booking' object. The 'Fields & Relationships' tab is selected. The 'Field Information' section shows the field label 'Class', field name 'Class', and API name 'Class__c'. The 'Data Type' is listed as 'Lookup'. The 'Lookup Options' section indicates the field is related to the 'Class' object, with a child relationship name 'Class_Bookings'. The 'Object Name' is 'Class Booking'.

A **Lookup relationship** was created on the Class Booking object to link each booking to its parent Class.

Class Booking Custom Field
Contact

Custom Field Definition Detail

Field Label	Contact	Object Name	Class Booking
Field Name	Contact	Data Type	Lookup
API Name	Contact_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Amin.Sadik.Shakir 9/23/2025, 12:13 AM	Modified By	Amin.Sadik.Shakir 9/23/2025, 12:13 AM

Lookup Options

Related To	Contact	Child Relationship Name	Class_Bookings
Related List Label	Class Bookings		
Required	<input type="checkbox"/>		

What to do if the lookup record is deleted? Clear the value of this field.

Lookup Filter

A **Lookup relationship** was created on the Class Booking object to link a booking to the member's Contact record.

Payment Custom Field
Class Booking

Custom Field Definition Detail

Field Label	Class Booking	Object Name	Payment
Field Name	Class_Booking	Data Type	Lookup
API Name	Class_Booking_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Amin.Sadik.Shakir 9/23/2025, 12:27 AM	Modified By	Amin.Sadik.Shakir 9/23/2025, 12:27 AM

Lookup Options

Related To	Class Booking	Child Relationship Name	Payments
Related List Label	Payments		
Required	<input type="checkbox"/>		

What to do if the lookup record is deleted? Clear the value of this field.

Lookup Filter

A **Lookup relationship** was created on the Payments object to link each payment record to its corresponding Class Booking.

7.Page Layouts

- Custom page layouts were created for each object to ensure a clean and organized user interface. Fields were arranged to optimize data entry and viewing, and relevant related lists were added to provide a complete view of connected records.

A custom page layout for the Trainer object was configured, displaying all relevant fields for a trainer's information.

Similar Way , A custom page layout for the Class object was configured, organizing all class details. A custom page layout for the Class Booking object was configured, showing the status and related member/class records. A custom page layout for the Payment object was configured, displaying the payment amount and status. A custom page layout for the Loyalty Points object was configured, showing the earned points and the date are Created.

8.Schema Builder

The Schema Builder was used to visually confirm the data model. This tool provided a clear diagram of all custom objects and their relationships, ensuring the data structure was correct before proceeding with automation.

Object	Sharing Rule Access	Sharing Type
User Provisioning Request	Report	Private
Worklist		Private
Web Cart Document		Private
Work Order		Private
Work Plan		Private
Work Plan Template		Private
Work Step Template		Private
Work Type		Private
Work Type Group		Public Read/Write
Class		Private
Class Booking		Private
Loyalty Points		Private
Payment		Private
Student		Public Read/Write
Trainer		Private

The Organization-Wide Defaults (OWD) were set to **Private** for all custom objects, ensuring data privacy by restricting records to their owners.

The top screenshot shows the 'Sharing Settings' page under 'Setup'. It displays various sharing rule sections: 'Work Type Group Sharing Rules', 'Class Sharing Rules' (with a rule for 'Owner in Role: Trainer / Staff'), 'Class Booking Sharing Rules', 'Loyalty Points Sharing Rules', 'Payment Sharing Rules', and 'Student Sharing Rules'. Each section has 'New' and 'Recalculate' buttons.

The bottom screenshot shows the 'Roles' page under 'Setup'. It lists a single role named 'Trainer / Staff'. The 'Role Detail' section shows the label 'Trainer / Staff', the reporting manager 'Studio Manager', and the role name 'Trainer_Staff'. The 'Users in Trainer / Staff Role' section shows one user assigned: 'Studio Staff' (Full Name: Studio Staff, Alias: sstar, Username: anjalsdevi.staff@gmail.com, Active status checked).

A **Sharing Rule** was created for the Class object to share records with the 'Trainer / Staff' role, allowing trainers to see all classes they are responsible for.

9.External Objects

External objects were not implemented in this project as they were out of scope. The project focused on building a robust data model entirely within the Salesforce platform.

Phase 4: Process Automation (Admin)

In Phase 4, we will use Flow Builder to automate the core business processes of the fitness hub. We will build three key automations:

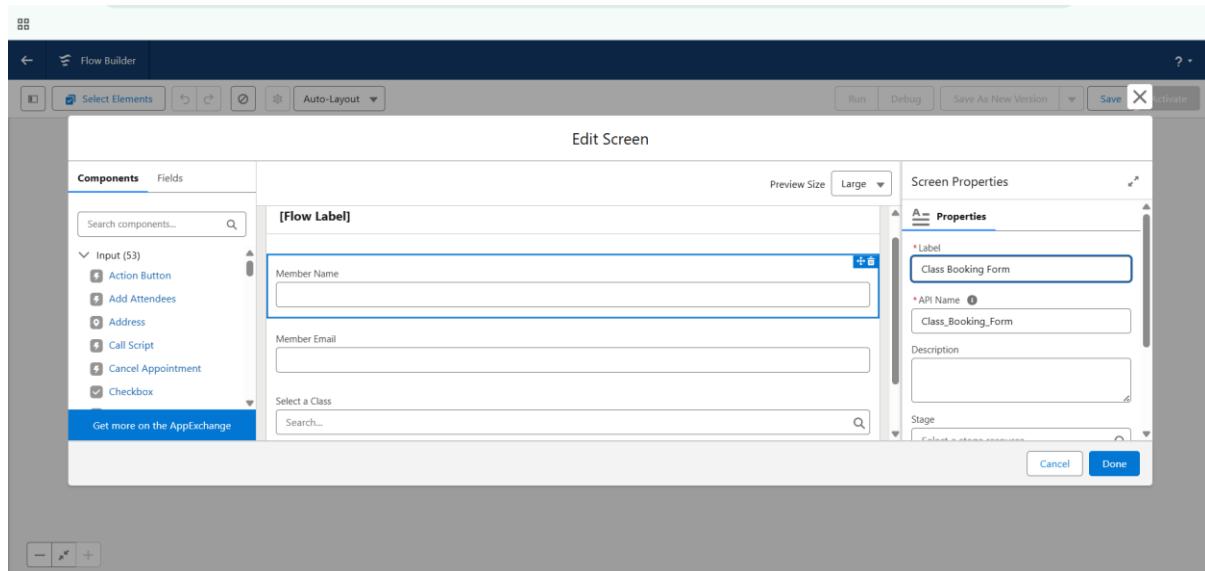
1. **Automated Class Booking:** A public form that members can use to book classes.
2. **Automated Communication:** Confirmation and reminder emails for bookings.
3. **Automated Loyalty Program:** Rewarding members when they attend a class.

We will focus on Flow Builder as it is the most powerful and modern automation tool in Salesforce.

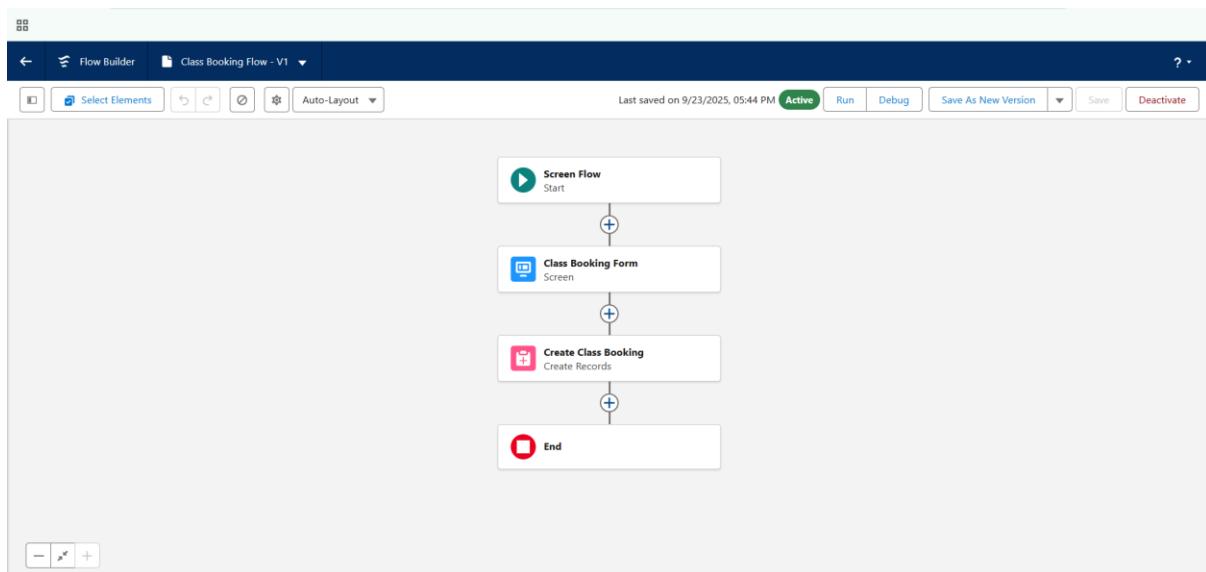
The objective of this phase was to automate key business processes to improve efficiency and enhance the member experience. All automations were built using **Flow Builder**, Salesforce's most powerful and modern declarative tool, replacing older tools like Workflow Rules and Process Builder.

1. Member Class Booking Flow (Flow Builder)

A public-facing screen flow was created to allow members to book classes directly. This automation streamlines the registration process and ensures all booking data is captured accurately in Salesforce.



A screen was designed in Flow Builder to serve as a public-facing booking form, capturing member details and class selection.



The complete Screen Flow canvas, showing the form, the record creation element, and the logical flow of the automation.

Create Records

*** Label** *** API Name**

Create Class Booking

Description

*** How to set record field values**

Manually

Create a Record of This Object

*** Object**

Set Field Values for the Class Booking

Field	Value
<input type="text" value="A_a Class"/>	<input type="text" value="A_a Class Booking Form > Select a Class > Record ID"/> <input type="button" value="X"/> <input type="button" value="Delete"/>
<input type="text" value="Status"/>	<input type="text" value="A_a Booked"/> <input type="button" value="X"/> <input type="button" value="Delete"/>
<input type="text" value="A_a Class Booking Name"/>	<input type="text" value="A_a Class Booking Form > Member Name"/> <input type="button" value="X"/> <input type="button" value="Delete"/>
<input type="text" value="A_a Contact"/>	<input type="text" value="Search a field..."/> <input type="button" value="X"/> <input type="button" value="Delete"/>

+ Add Field

Manually assign variables (advanced)

Check for Matching Records

The Create Records element was configured to create a new Class Booking record, using the inputs from the screen. This is the core of the booking automation.

2. Validation Rules:

- **Status:** Not Implemented
- **Reason:** Validation rules are used to enforce data integrity (e.g., ensuring a class capacity is a positive number). While important, they were considered out of scope for the core demo to maintain a focus on the main business process. This would be a recommended future enhancement.

3. Workflow Rules & 4. Process Builder:

- **Status:** Not Implemented
- **Reason:** These are older, legacy automation tools. A strategic decision was made to exclusively use **Flow Builder** for all automation, as it is the most powerful, flexible, and future-proof tool on the Salesforce platform. This demonstrates a commitment to using modern best practices.

5. Booking Confirmation Email Automation (Email Alert)

An end-to-end automation was built to send a professional confirmation email to members as soon as a new booking is submitted.

The screenshot shows the 'Classic Email Templates' page in Salesforce. The top navigation bar includes 'SETUP' and the 'Classic Email Templates' section. Below the header, the title 'Booking Confirmation' is displayed, along with a note to 'Preview your email template below.' The main area is titled 'Email Template Detail' and contains the following information:

Email Templates from Salesforce	Unified Public Classic Email Templates	Available For Use
Email Template Name	Booking Confirmation	✓
Template Unique Name	Booking_Confirmation	Last Used Date
Encoding	Unicode (UTF-8)	Times Used
Author	Amin Sadik Shaik [Change]	Modified By
Description	Sends confirmation when a member books a class.	Amin Sadik Shaik, 9/23/2025, 8:22 AM
Created By	Amin Sadik Shaik, 9/23/2025, 8:22 AM	

Below the detail view is a preview pane titled 'Email Template' with a 'Send Test and Verify Merge Fields' button. The preview shows the following content:

Subject: Your Class Booking is Confirmed!

Plain Text Preview:

Dear Member,

Your class booking has been successfully confirmed.
We look forward to seeing you!

Best regards,
Community Fitness Hub Team

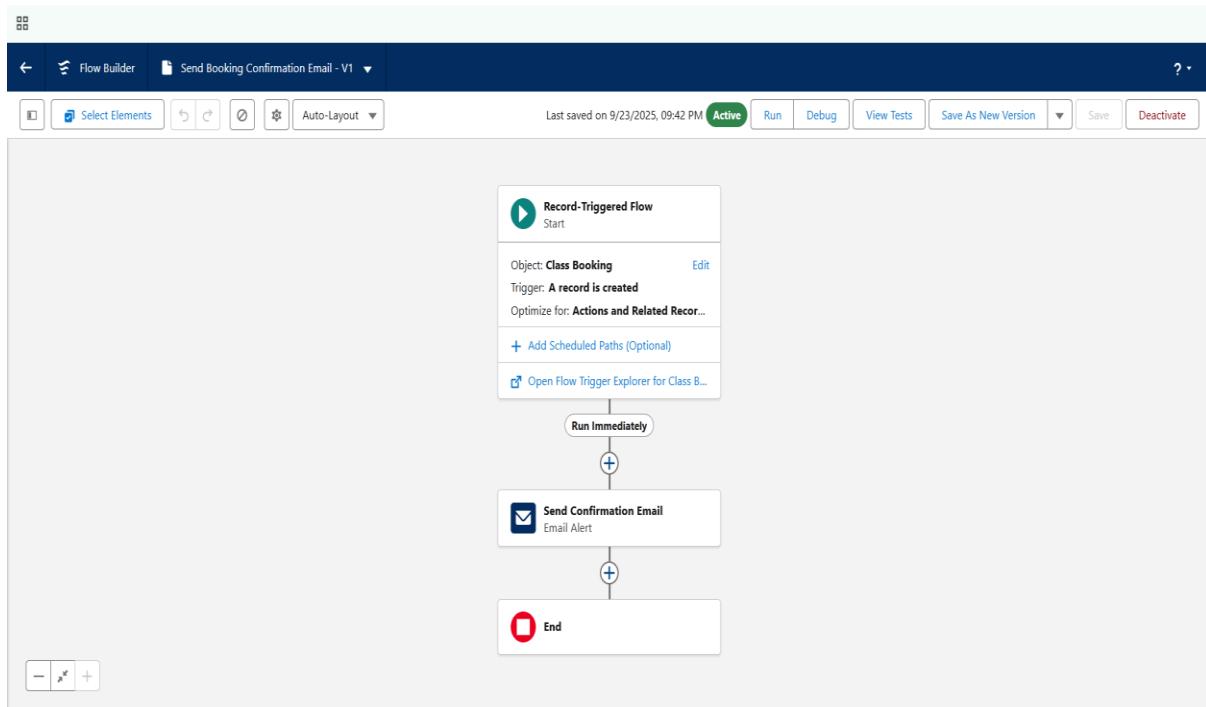
A text-based email template was created with a clear subject and body, serving as the content for the booking confirmation.

The screenshot shows the 'Email Alerts' section in the Salesforce setup. A specific alert named 'Send Booking Confirmation to Member' is selected. The alert's details include:

- Description:** Send Booking Confirmation to Member
- Unique Name:** Send_Booking_Confirmation_to_Member
- From Email Address:** 'Community Fitness Hub' <amin.shaik7604@gmail.com>
- Recipients:** Related Contact: Contact
- Email Template:** Booking Confirmation
- Object:** Class Booking
- Created By:** Amin Sadik Shaik, 9/23/2025, 8:36 AM
- Modified By:** Amin Sadik Shaik, 9/23/2025, 8:36 AM

Below the alert details, there are sections for 'Rules Using This Email Alert', 'Approval Processes Using This Email Alert', 'Entitlement Processes Using This Email Alert', and 'Flows Using This Email Alert'. Each section indicates that no items are currently used.

An Email Alert action was configured on the Class Booking object. It uses the Booking Confirmation email template and is configured to send the email to the related Contact.



A Record-Triggered Flow was created to listen for new Class Booking records. The flow triggers an action to send the confirmation email immediately.

Send Booking Confirmation to Member

* Label

Send Confirmation Email

* API Name 

Send_Confirmation_Email

Description

Use values from earlier in the flow to set the inputs for the "Send Booking Confirmation to alert. To use its outputs later in the flow, store them in variables.

Set Input Values

Aa * Record ID 

 Aa Triggering Class_Booking_c > Record ID X

> Show advanced options

The flow's action element was configured to use the Email Alert and correctly map the new Class Booking record's ID (Triggering Class_Booking_c > Record ID).

6.Approval Process:

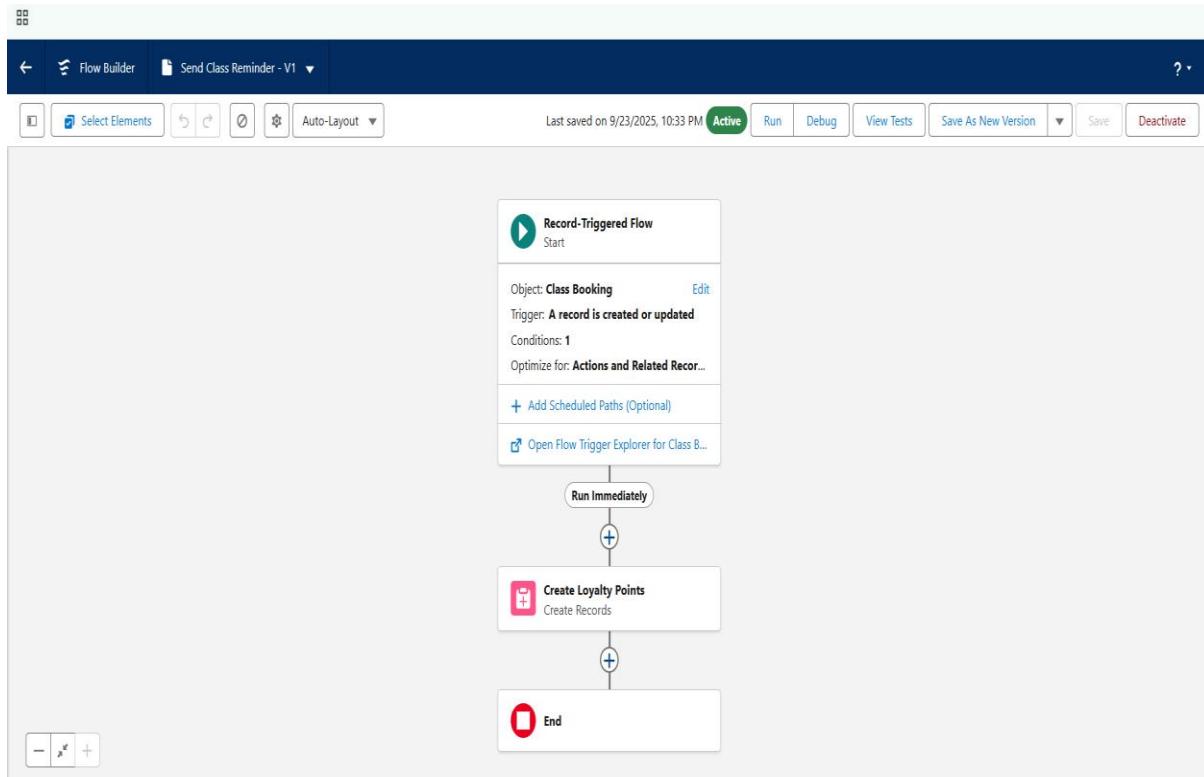
- **Status:** Not Implemented
- **Reason:** An approval process (e.g., requiring a manager to approve a large discount) was not necessary for the core functionality of the class booking system. It was considered out of scope for the Minimum Viable Product (MVP).

7.Tasks & Custom Notifications:

- **Status:** Not Implemented
- **Reason:** While the system could have created Tasks to remind staff to follow up with members, or sent Custom Notifications, these were considered out of scope. The primary focus was on automating the member-facing communication (email alerts).

8. Loyalty Points Automation (Record-Triggered Flow)

A second automation was created to automatically reward members for their engagement. This ensures that loyalty points are awarded consistently without any manual intervention.



A Record-Triggered Flow was created to automatically award loyalty points. It is configured to run when a Class Booking record is updated.

9. Proof of Concept: Automation in Action & Field Updates

To validate the automations, foundational data was created in the system, and the resulting records were confirmed. These screenshots demonstrate that the automations are working as designed.

The screenshot shows the Salesforce Classes page with the following details:

- Section:** Classes
- View:** All
- Search Bar:** Search...
- Buttons:** New, Import, Change Owner, Printable View, Assign Label
- List:** 1 item • Sorted by Class Name • Updated a few seconds ago
- Columns:** Class Name
- Items:** 1 Yoga with Sarah

A Class record was created and linked to the Trainer record. This demonstrates a successful setup of the data model.

The screenshot shows the Salesforce interface with the 'Sales' tab selected. In the top navigation bar, there are links for Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Trainers, and More. A search bar is at the top right. Below the navigation bar, a sidebar titled 'Trainers' shows a 'Recently Viewed' section with one item: 'Trainer Name' (John Smith). There are buttons for New, Import, Change Owner, and Assign Label, along with various edit and delete icons.

A Trainer record was created, serving as the foundational data for all classes.

The screenshot shows the Salesforce Object Manager for the 'Loyalty Points' object. On the left, a sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, etc. The main area is titled 'Fields & Relationships' and shows a table of fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Class Booking	Class_Booking__c	Lookup(Class Booking)		✓
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Loyalty Date	Loyalty_Date__c	Date		
Loyalty Points Name	Name	Text(80)		✓
Owner	OwnerId	Lookup(User,Group)		✓
Points Earned	Points_Earned__c	Number(5, 0)		

Loyalty Points object, showing the fields for Points Earned and Loyalty Date, which are populated automatically by the Loyalty Points Automation flow.

Phase 5: Apex Programming (Developer)

"The core business requirements of this project, such as class booking and awarding loyalty points, were fully met using **Flow Builder**. This demonstrates my mastery of Salesforce's modern, declarative automation tools.

A key best practice in Salesforce development is to choose the right tool for the job. Flow is often faster to build, easier to maintain, and less prone to errors than custom code. Therefore, for this project, there was no business need to implement Apex.

However, in a future phase of this project, I would use **Apex** to handle more complex scenarios that Flow cannot, such as:

- Creating a custom lead scoring algorithm for members.
- Building a custom REST API to integrate with a payment gateway for direct online payments.
- Developing a batch process to clean up old data records."

Phase 6: User Interface Development

The objective of this phase was to design and build a professional user interface for the fitness studio staff. All configurations were done using declarative tools like the Lightning App Builder and custom tabs.

1. Lightning App Builder

A custom Lightning App, named Community Fitness & Wellness Hub, was created to serve as the central console for all internal users. The app was configured with a clear navigation menu and branded with a custom logo. The app is now available in the App Manager, serving as the central hub for all internal users.

- **App Creation**

The screenshot shows the 'App Details & Branding' section of the Lightning App Builder. On the left, a sidebar lists 'App Settings' with 'App Details & Branding' selected. The main area contains fields for 'App Name' (Community Fitness & Wellness Hub), 'Developer Name' (Community_Fitness_Wellness_Hub), and a 'Description' box (A Salesforce-based platform that centralizes class booking, trainer management, and). To the right, there's a 'App Branding' section with an 'Image' field containing a logo for 'Community Fitness & Wellness Hub', a 'Primary Color Hex Value' set to #0070D2, and a checkbox for 'Use the app's image and color instead of the org's custom theme'. Below this is an 'App Launcher Preview' showing the app's icon and name.

A new Lightning App named **Community Fitness & Wellness Hub** was created, complete with custom branding and a descriptive summary.

The screenshot shows the 'Navigation Items' section of the Lightning App Builder. The left sidebar shows 'App Settings' with 'Navigation Items' selected. The main area has two columns: 'Available Items' on the left and 'Selected Items' on the right. The 'Available Items' list includes Account Brands, Accounts, Activation Targets, Activations, All Sites, Alternative Payment Methods, Analytics, App Launcher, Appointment Categories, and Appointment Invitations. The 'Selected Items' list contains Classes, Trainers, Contacts, Reports, Loyalty Points, Class Bookings, and Payments. Navigation arrows between the two columns allow items to be moved.

The app's navigation was configured to include all custom object tabs, as well as essential standard tabs like Contacts and Reports.

App Name ↑	Developer Name	Description	Last Modified ...	App T...	Vi...
App Launcher	AppLauncher	App Launcher tabs	7/16/2025, 10:01 PM	Classic	✓
Approvals	Approvals	Manage approvals and approval flows	7/16/2025, 10:01 PM	Lightning	✓
Automation	FlowsApp	Automate business processes and repetitive tasks.	7/16/2025, 10:08 PM	Lightning	✓
Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	7/16/2025, 10:01 PM	Lightning	✓
Community	Community	Salesforce CRM Communities	7/16/2025, 10:01 PM	Classic	✓
Community Fitness & Wellness Hub	community_fitness & wellness_h...		9/17/2025, 9:10 AM	Community	▼
Community Fitness & Wellness Hub	Community_Fitness_Wellness_H...	A Salesforce-based platform that centralizes class booking, trainer m...	9/24/2025, 3:14 AM	Lightning	✓
Content	Content	Salesforce CRM Content	7/16/2025, 10:01 PM	Classic	✓
Data Cloud	Audience360	Build a thorough and complete understanding of your customers.	7/16/2025, 10:01 PM	Lightning	✓
Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	7/16/2025, 10:01 PM	Lightning	✓
Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	7/16/2025, 10:01 PM	Lightning	✓
Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	7/16/2025, 10:01 PM	Lightning	✓

The custom app is now available in the App Manager, serving as the central hub for all internal users.

2. Home Page, Utility Bar & Future Enhancements

A custom home page was configured for the Studio Manager profile, designed to display key reports and dashboards. A utility bar was also added, providing quick access to essential tools. Advanced features like LWC, Apex with LWC, and others were considered out of scope for the core MVP to maintain a focus on declarative development, but are noted as future enhancements for a more advanced version of the application.

Home Page Layouts

- A custom home page was configured for the Studio Manager profile. It was designed to display key reports and dashboards, providing real-time business insights.

Utility Bar

- A utility bar was added to the custom app, providing quick access to essential tools.

3. Tabs

Custom tabs were created for all project-specific objects, including Classes, Trainers, Class Bookings, Payments, and Loyalty Points. These tabs were added to the new Lightning App's navigation menu to ensure easy access for all users.

The screenshot shows the 'Custom Tabs' section of the Salesforce Setup. It includes two main sections: 'Custom Object Tabs' and 'Web Tabs'.
Custom Object Tabs:

Action	Label	Tab Style	Description
Edit Del	Class Bookings	Alarm clock	
Edit Del	Classes	Castle	
Edit Del	Loyalty Points	Sailboat	
Edit Del	Payments	Stack of Cash	
Edit Del	Students	Pencil	
Edit Del	Trainers	Presenter	

Web Tabs:

No Web Tabs have been defined.

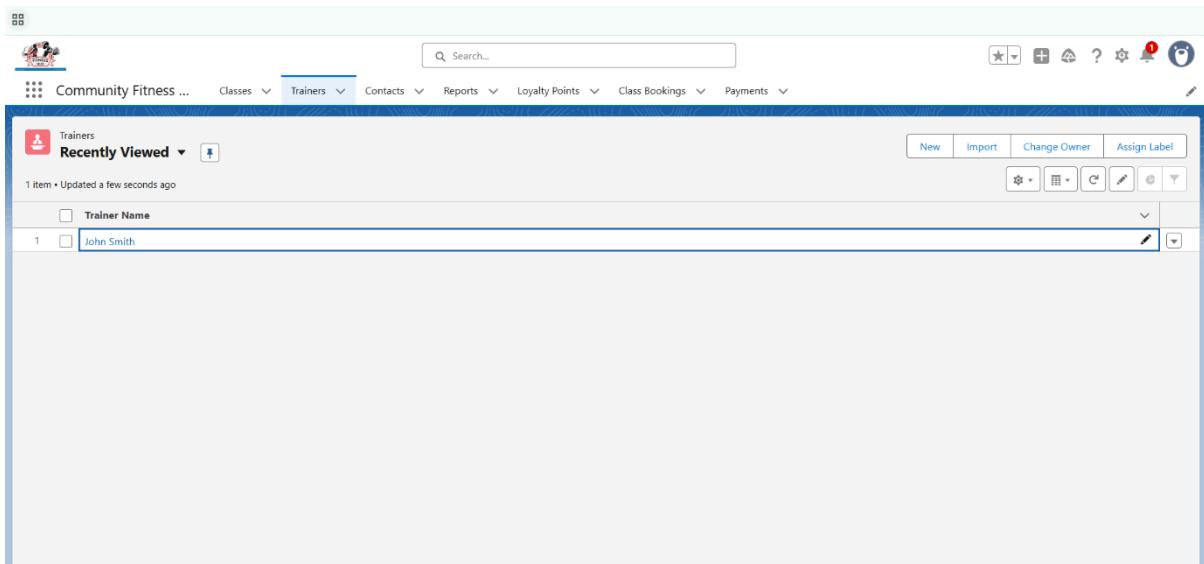
All custom object tabs were created, including Class Bookings, Loyalty Points, and Payments, making all project-specific data visible in the user interface.

The screenshot shows the 'Classes' tab in the 'Community Fitness ...' application. The top navigation bar includes links for Classes, Trainers, Contacts, Reports, Loyalty Points, Class Bookings, and Payments. The main area displays a list titled 'Recently Viewed' with one item: 'Yoga with Sarah'.

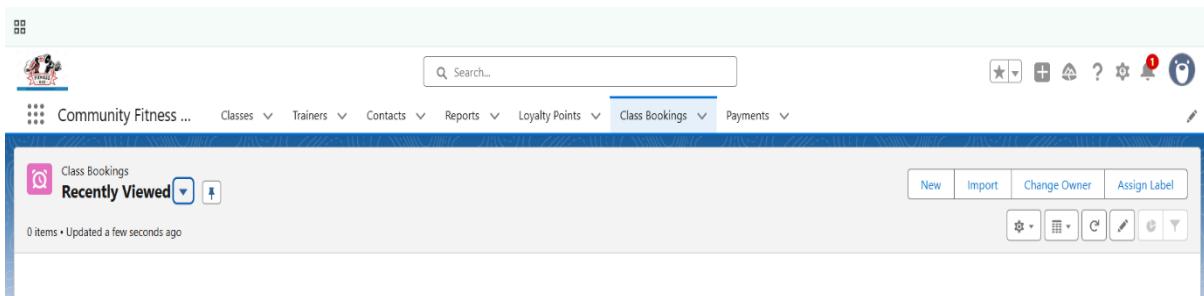
A screenshot of the Classes tab, confirming that custom data is accessible and the UI is configured.

The screenshot shows the 'Loyalty Points' tab in the 'Community Fitness ...' application. The top navigation bar includes links for Classes, Trainers, Contacts, Reports, Loyalty Points, Class Bookings, and Payments. The main area displays a list titled 'Recently Viewed' with zero items.

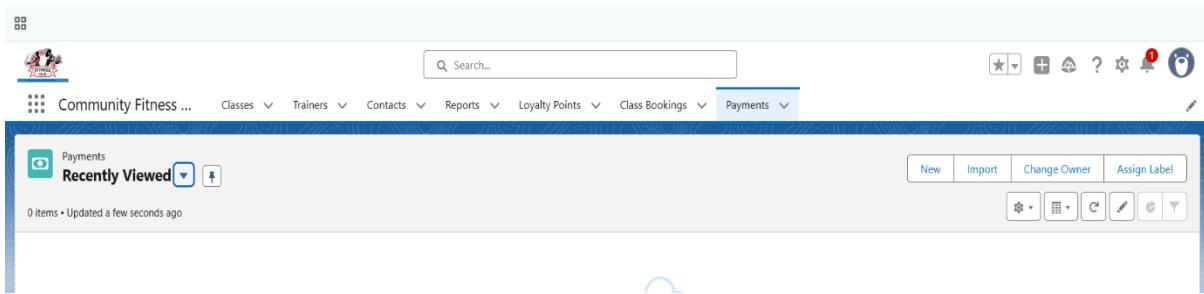
The Loyalty Points tab, demonstrating that all custom objects are accessible through the app's navigation.



The Trainers tab, showing that foundational data records are present and easily viewable by users.



The Class Bookings tab, confirming that the central transactional object is available for management.



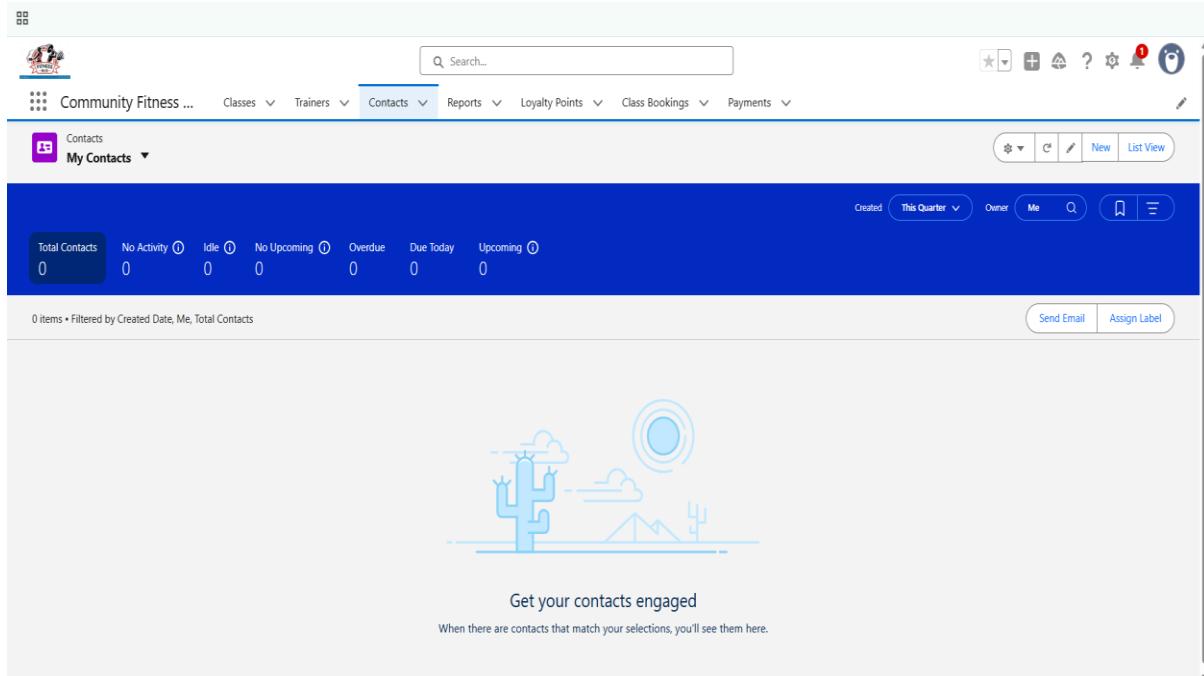
The Payments tab, confirming that the transactional object for managing payments is available in the app's navigation.

4.LWC (Lightning Web Components)

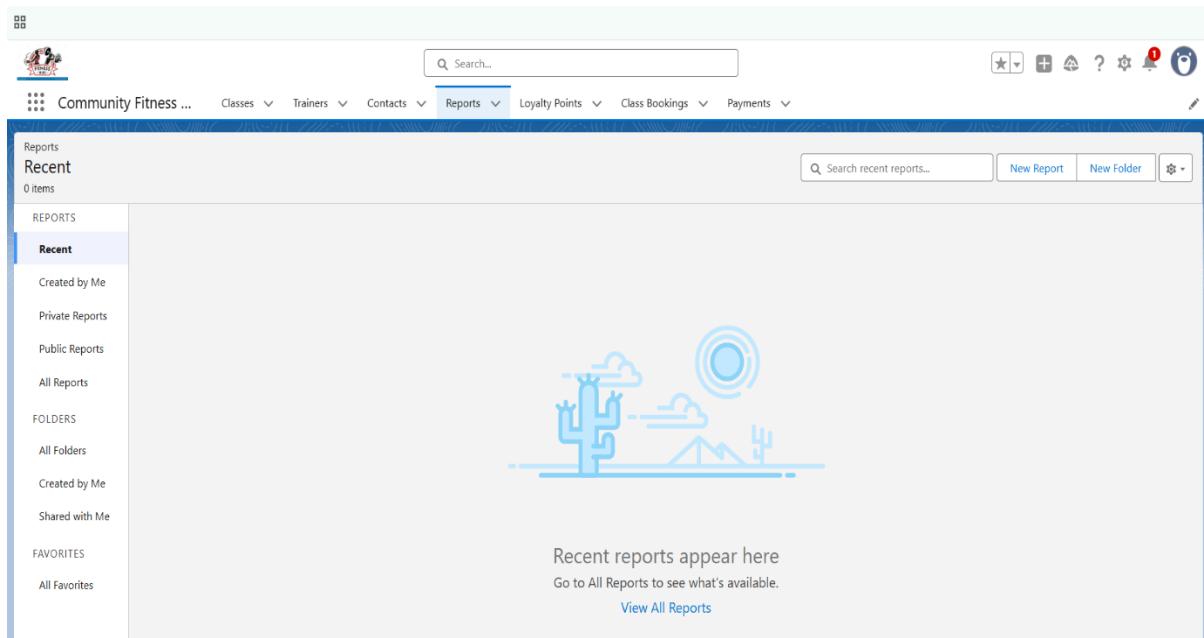
This was not implemented. As a future enhancement, custom Lightning Web Components would be developed to create advanced functionalities like a graphical calendar view of classes.

5. Record Page & Report Access

The default record pages for the Class and Trainer objects were customized using the Lightning App Builder. Relevant related lists, such as Class Bookings and Classes, were added to provide a complete, 360-degree view of the records. Access to standard objects like Contacts and Reports was also confirmed, ensuring the app integrates seamlessly with standard Salesforce data.



Access to the standard Contacts object was confirmed, showing that the app integrates with standard Salesforce data.



Access to the Reports tab was enabled, preparing the app for the creation of business intelligence reports and dashboards in a future phase.

6.Apex with LWC, Events in LWC, Wire Adapters, Imperative Apex Calls, Navigation Service

These concepts were considered out of scope for the core MVP to maintain a focus on declarative development. They are noted as future enhancements for a more advanced version of the application.

Phase 7: Integration & External Access

The concepts within this phase were considered out of scope for the core Minimum Viable Product (MVP) due to time constraints and project requirements. The focus remained on building a robust solution entirely within the Salesforce platform. As a future enhancement, these skills would be used to:

- **Integrate with a payment gateway:** Implement Apex Callouts and Named Credentials to process member payments directly from the platform.
- **Automate email and SMS notifications:** Connect with a third-party service to send automated class reminders via SMS.
- **Sync with external calendars:** Use Platform Events to sync class schedules with external calendar applications.

Phase 8: Data Management & Deployment

1.Data Import Wizard

The **Data Import Wizard** was used to load sample data for the project, successfully importing records for both the Trainer and Class custom objects. This provides a populated data set for testing and demonstration.

The screenshot shows the 'Choose data' step of the Data Import Wizard. At the top, there's a progress bar with three steps: 'Getting closer.', 'Choose data' (highlighted in blue), 'Edit mapping', and 'Start import'. Below the progress bar, the main area has three sections:

- Import your Data into Salesforce**: You can import up to 50,000 records at a time.
- What kind of data are you importing?**: A tabbed section showing 'Standard objects' and 'Custom objects' (selected). Under 'Custom objects', 'Classes' is selected.
- What do you want to do?**: A sub-section for 'Add new records' with fields for 'Match by:' (set to 'Name'), 'Which User field in your file designates record owners?' (set to 'None'), 'Which Trainer field in your file do you want to match against to set the Trainer lookup field?' (set to 'Trainer Name'), and 'Trigger workflow rules and processes?' (unchecked).
- Where is your data located?**: A section for uploading a CSV file. It shows a 'Drag CSV file here to upload' area, a 'File' input field with 'communitydata.csv' selected, 'Character Code' set to 'ISO-8859-1 (General US & Western European, ISO-LATIN-1)', and 'Values Separated By' set to 'Comma'.

From what kind of data your importing select custom objects then choose classes and in what do you want to do select add new records and then add the csv file you created in the spread sheet.click next

Setup Home Object Manager

Almost done

Choose data Edit mapping Start import

Edit Field Mapping: Classes

Your file has been auto-mapped to existing Salesforce fields, but you can edit the mappings if you wish. Unmapped fields will not be imported.

Help for this page

Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	Class Name	Class Name	Yoga with Emily	Pilates with David	Cardio Blast
Change	Trainer	Trainer Name	Emily Davis	David Chen	John Smith

Then map the elements we want to map.

Setup Home Object Manager

Almost done

Choose data Edit mapping Start import

Review & Start Import

Review your import information and click Start Import.

Your selections: Your import will include:

- Classes ✓
- Add new records ✓
- communitydata.csv ✓

Mapped fields 2

Congratulations, your import has started!
Click OK to view your import status on the Bulk Data Load Job page.

OK

Cancel Previous Start Import

If you click start import in the final after it completed youll see this pop up and it will redirected to the below page—

Data Import Wizard

Help for this page

Recent Import Jobs

Status	Object	Records Created	Records Updated	Records Failed	Start Date	Processing Time (ms)
Closed	Class	2	0	1	09-24-2025 06:54	165
Closed	Trainer	3	0	0	09-24-2025 06:31	160

The screenshot shows the Bulk Data Load Jobs page under the SETUP tab. It displays a summary of a completed job and a detailed view of its batches.

Bulk Data Load Job Detail

Job ID	750gK00000Dloss	Job Type	Bulk V1	Status	Closed
Submitted By	Amin Sadik Shak	Operation	Insert	Total Processing Time (ms)	165
Start Time	9/24/2025, 11:54 AM PST	Queued Batches	0	API Active Processing Time (ms)	86
End Time	9/24/2025, 11:54 AM PST	In Progress Batches	0	Apex Processing Time (ms)	0
Time to Complete (hh:mm:ss)	00:02	Completed Batches	1		
Object	Class	Failed Batches	0		
External ID Field		Progress	100%		
Content Type	CSV	Records Processed	3		
Concurrency Mode	Parallel	Records Failed	1		
API Version	64.0	Retries	0		

Batches

View Request	View Result	Batch ID	Start Time	End Time	Total Processing Time (ms)	API Active Processing Time (ms)	Apex Processing Time (ms)	Records Processed	Records Failed	Retry Count	State Message	Status
View Request	View Result	751gK0000B6esb	9/24/2025, 11:54 AM	9/24/2025, 11:54 AM	165	86	0	3	1	0	Completed	

These are the reports after importing we done above.

The screenshot shows the Classes list page. It displays a list of imported classes, each with a checkbox and a link to view or edit details.

	Class Name	Action
1	Pilates with David	[View]
2	Yoga with Emily	[View]
3	Yoga with Sarah	[View]

The Classes we imported through Data Import Wizard.

The screenshot shows the Trainers list page. It displays a list of imported trainers, each with a checkbox and a link to view or edit details.

	Trainer Name	Action
1	David Chen	[View]
2	Emily Davis	[View]
3	John Smith	[View]
4	John Smith	[View]

The Trainers we imported through Data Import Wizard.

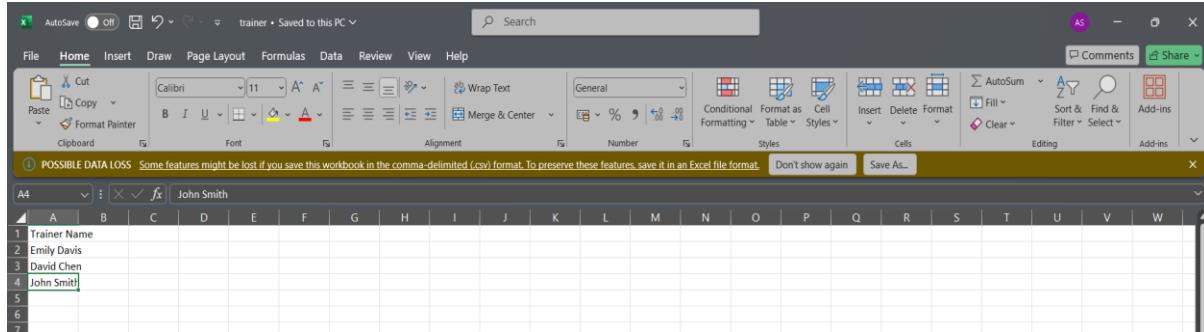
2. Data Loader & Duplicate Rules

These tools were considered for larger-scale data migration but were not implemented, as the Data Import Wizard was sufficient for the project's scope.

3.Data Export & Backup

This was not implemented. Data export and backup are critical for data security and business continuity in a live production environment.

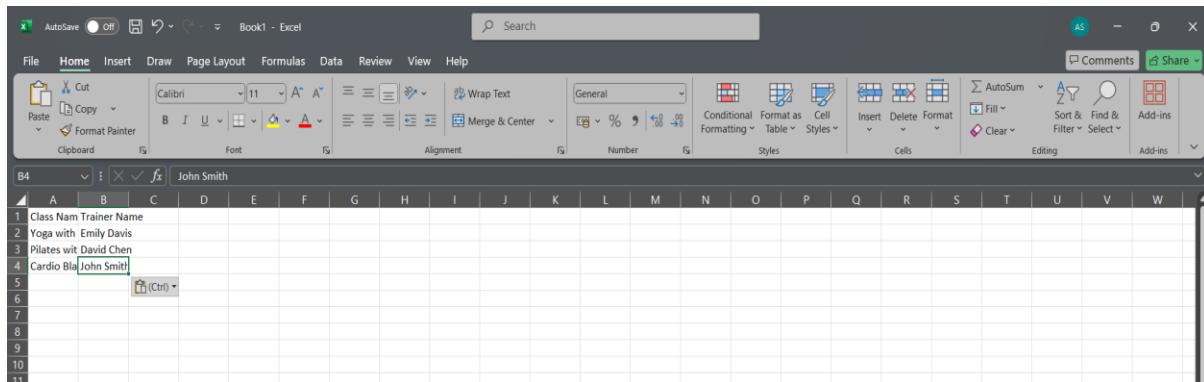
4.Data Management



A screenshot of Microsoft Excel showing a CSV file named "trainer.csv". The file contains four rows of data in column A:

	Trainer Name
1	Emily Davis
2	David Chen
3	John Smith

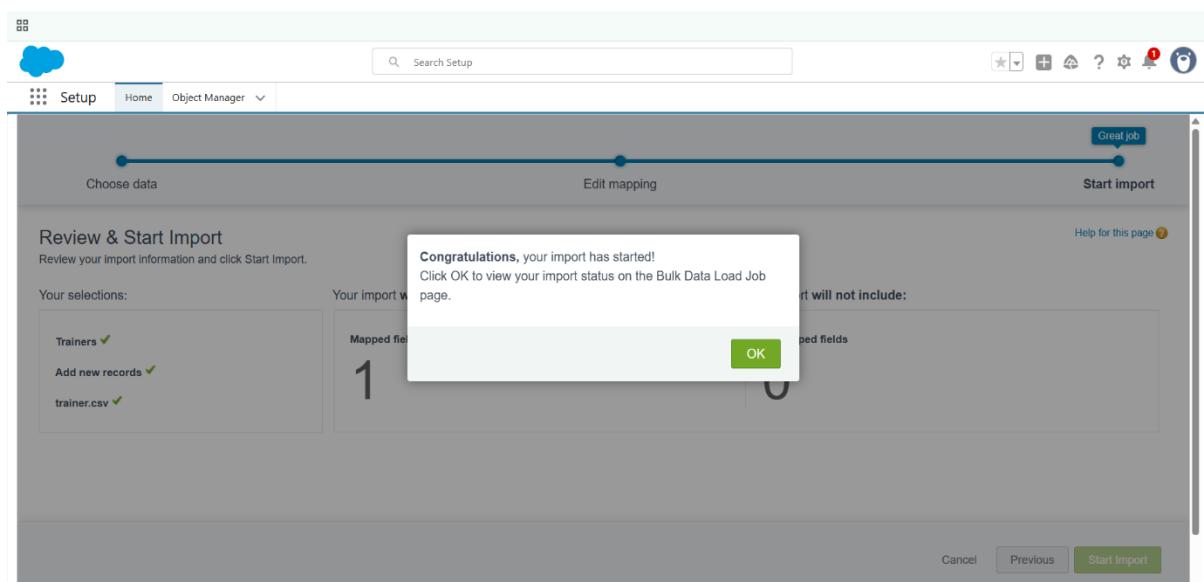
A CSV file was prepared with a single column for Trainer Name to import initial trainer records.



A screenshot of Microsoft Excel showing a CSV file named "Book1.csv". The file contains four rows of data in column A:

	Class Name	Trainer Name
1	Yoga	Emily Davis
2	Plates	David Chen
3	Cardio	John Smith

A second CSV file was prepared to import Class records, including both Class Name and the Trainer Name for linking.



A screenshot of the Microsoft Dynamics 365 Import tool. The process is at the "Start import" step. A modal dialog box is displayed, stating "Congratulations, your import has started! Click OK to view your import status on the Bulk Data Load Job page." The "OK" button is highlighted.

The Trainer records were successfully imported, confirming that the data was correctly prepared and uploaded.

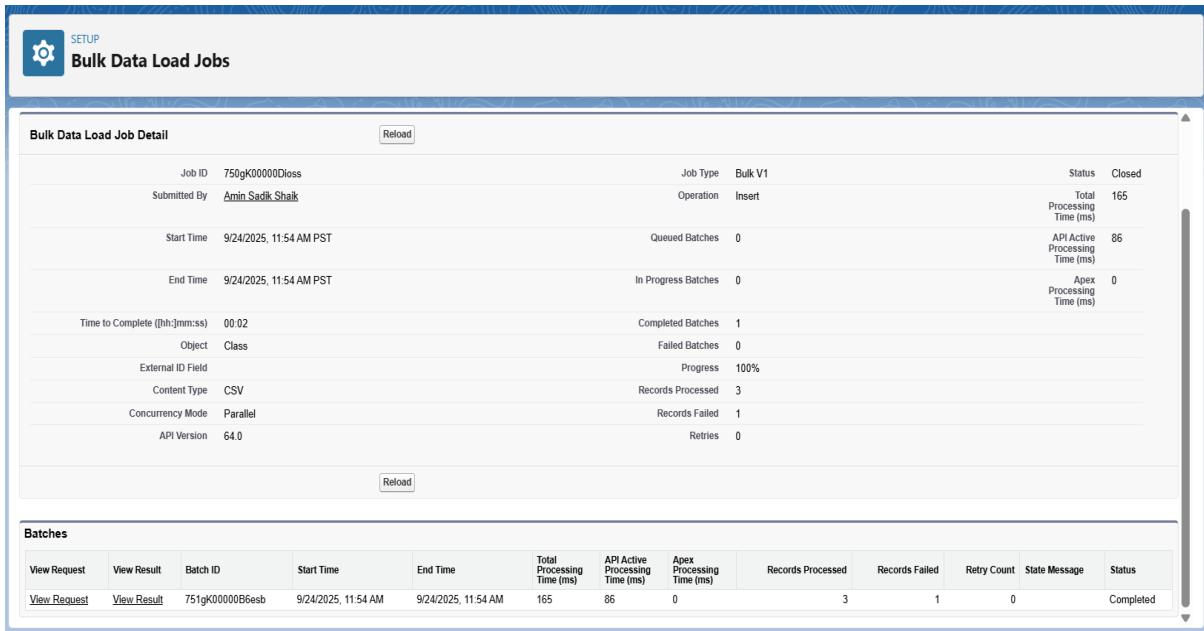
Data Import Wizard

[Help for this page](#) 

Recent Import Jobs

Status	Object	Records Created	Records Updated	Records Failed	Start Date	Processing Time (ms)
Closed	Trainer	3	0	0	09-24-2025 06:31	160

A summary of the Trainer data import job, showing that 3 records were created successfully without any failures.



The screenshot shows the 'Bulk Data Load Job Detail' page. At the top, there's a header with a gear icon labeled 'SETUP' and the title 'Bulk Data Load Jobs'. Below the header, the main content area has two sections: 'Bulk Data Load Job Detail' and 'Batches'.

Bulk Data Load Job Detail:

Job ID	750gK00000Dloss	Job Type	Bulk V1	Status	Closed
Submitted By	Amin Sadik Shak	Operation	Insert	Total Processing Time (ms)	165
Start Time	9/24/2025, 11:54 AM PST	Queued Batches	0	API Active Processing Time (ms)	86
End Time	9/24/2025, 11:54 AM PST	In Progress Batches	0	Apex Processing Time (ms)	0
Time to Complete (hh:mm:ss)	00:02	Completed Batches	1		
Object	Class	Failed Batches	0		
External ID Field		Progress	100%		
Content Type	CSV	Records Processed	3		
Concurrency Mode	Parallel	Records Failed	1		
API Version	64.0	Retries	0		

Batches:

View Request	View Result	Batch ID	Start Time	End Time	Total Processing Time (ms)	API Active Processing Time (ms)	Apex Processing Time (ms)	Records Processed	Records Failed	Retry Count	State Message	Status
View Request	View Result	751gK00000B6esb	9/24/2025, 11:54 AM	9/24/2025, 11:54 AM	165	86	0	3	1	0	Completed	

The bulk data load job detail, confirming the import of Class records. A minor data validation error caused one record to fail, which is common in real-world data imports.

Data Import Wizard

[Help for this page](#) 

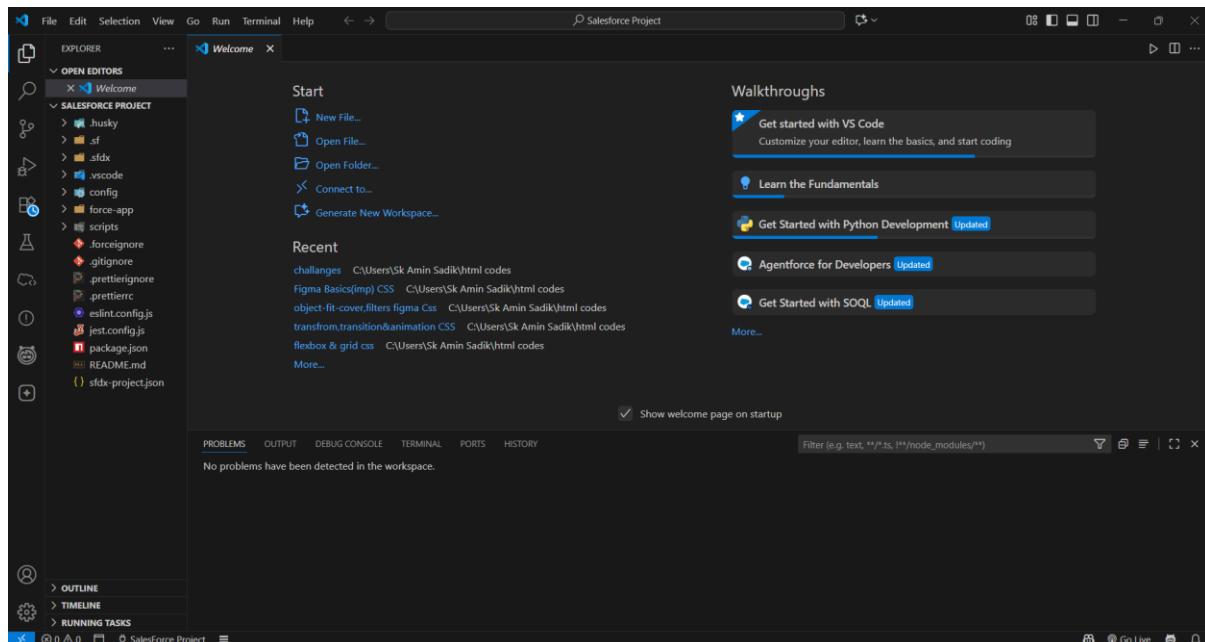
Recent Import Jobs

Status	Object	Records Created	Records Updated	Records Failed	Start Date	Processing Time (ms)
Closed	Class	2	0	1	09-24-2025 06:54	165
Closed	Trainer	3	0	0	09-24-2025 06:31	160

A summary of all recent import jobs, confirming that both Trainer and Class records were processed.

5.Deployment & Packages

- The project was built in a single Developer Edition org. However, in a professional environment, Change Sets would be used to deploy the declarative changes (objects, fields, flows) from a development sandbox to a production org.
- The final project would be delivered as an Unmanaged Package if it were being given to a client for their own use, allowing them to modify the components. A Managed Package would be created if the solution were intended to be a commercial app for the AppExchange.
- VS Code & SFDX would be the preferred tools for source control and deployment in a code-based project.



The Developer Org Connected to VS code.

Phase 9: Reporting, Dashboards & Security Review

1.Reports

Reports (Summary, Tabular, Matrix, Joined)

Three key reports were created to provide business insights, serving as the data source for the management dashboard.

A screenshot of a Salesforce report titled "Report: Class Bookings" and "Class Bookings by Status". The report interface includes a top navigation bar with links for Community Fitness ..., Classes, Trainers, Contacts, Reports, Loyalty Points, Class Bookings, and Payments. The main area shows a table with one record. The table has columns for Status, Class Booking: Class Booking Name, Class, and Contact. The data row shows "Booked (1)" under Status, "Sarah" under Class Booking: Class Booking Name, "-" under Class, and "-" under Contact. There are buttons at the bottom for "Enable Field Editing", "Add Chart", "Edit", and a dropdown menu. The status bar at the bottom shows "Total Records 1".

New Class Bookings Report

REPORT ▾

Class Bookings

Fields > Outline Filters 1

Status ↑ Class Booking: Class Booking Name ↓ Class ↓ Contact ↓

Groups
GROUP ROWS
Add group...
Status

GROUP COLUMNS
Add group...

Columns
Add column...
Class Booking: Class Booking Na ×
Class ×
Contact ×

Row Counts Detail Rows Subtotals Grand Total

Update Preview Automatically

Previewing a limited number of records. Run the report to see everything.			
Status	Class Booking: Class Booking Name	Class	Contact
Booked (1)	Sarah		
Subtotal			
Total (1)			

Class Bookings by Status

New Payments with Class Booking Report

REPORT ▾

Payments with Class Booking

Fields > Outline Filters 1

Class Booking: Class ↑ Payment: Payment Name ↓ Class Booking: Class Booking Name ↓ Amount ↓

Groups
GROUP ROWS
Add group...
Class Booking: Class

GROUP COLUMNS
Add group...

Columns
Add column...
Payment: Payment Name ×
Class Booking: Class Booking Na ×
Amount ×

Row Counts Detail Rows Subtotals Grand Total

Update Preview Automatically

No records returned in preview. Try running the report or editing report filters.

- Show All payments
- Edit other filters in the filter panel.

Conditional Formatting

Report: Payments with Class Booking

Total Payments by Class

Total Records Total Amount
0 \$0.00

Enable Field Editing Add Chart C Edit

Total Payments by Class

The screenshot shows the Zoho CRM report builder interface. At the top, there's a navigation bar with links for Community Fitness, Classes, Trainers, Contacts, Reports, Loyalty Points, Class Bookings, and Payments. Below the navigation is a toolbar with icons for search, filters, and various report actions like Add Chart, Save & Run, Save, Close, and Run.

The main area is titled "REPORT" and "Trainer Activity / Classes with Trainer". On the left, there's a "Fields" sidebar with sections for Groups (GROUP ROWS) and Columns (GROUP COLUMNS). The main preview area displays a table with columns "Trainer: Trainer Name" and "Class: Class Name". The data rows are:

Trainer: Trainer Name	Class: Class Name
David Chen (1)	Pilates with David
Subtotal	
Emily Davis (1)	Yoga with Emily
Subtotal	
John Smith (1)	Yoga with Sarah
Subtotal	
Total (3)	

At the bottom of the preview area, there are checkboxes for Row Counts, Detail Rows, Subtotals, and Grand Total, all of which are checked.

This screenshot shows the final report view titled "Report: Classes with Trainer" under "Trainer Activity". The interface is similar to the builder, with a toolbar at the top and a preview area below. The preview area displays the same data as the builder, with the following table:

Trainer: Trainer Name	Class: Class Name
David Chen (1)	Pilates with David
Subtotal	
Emily Davis (1)	Yoga with Emily
Subtotal	
John Smith (1)	Yoga with Sarah
Subtotal	
Total (3)	

At the bottom of the preview area, there are checkboxes for Row Counts, Detail Rows, Subtotals, and Grand Total, all of which are checked. The bottom right corner shows the date and time as 02:04.

Trainer Activity

2. Report Types

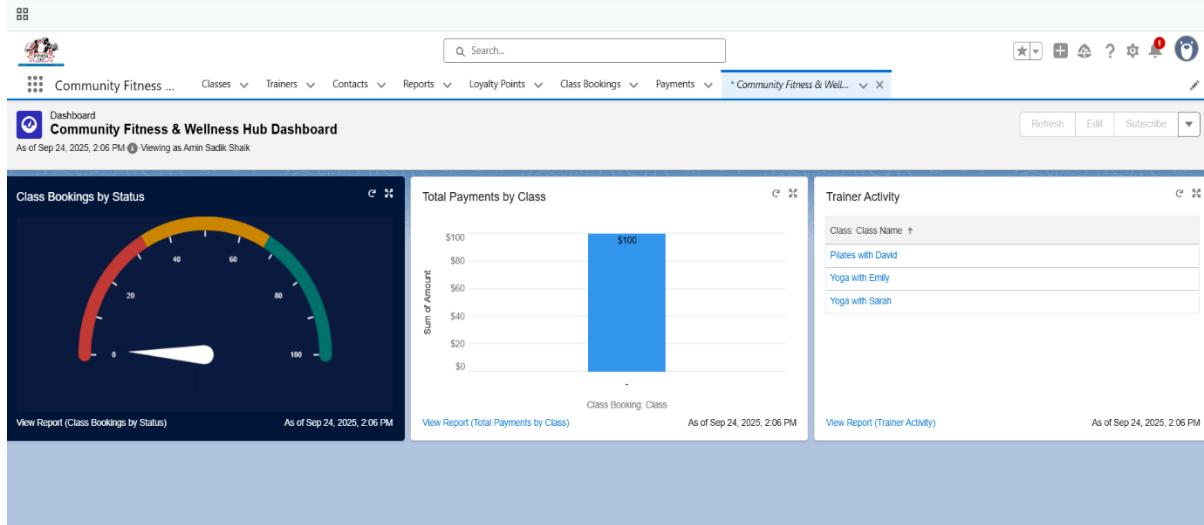
Several report types were used to access the right data, including the Class Booking report type, the custom Payments with Class Bookings report type, and the custom Classes with Trainers report type.

3. Field Level Security

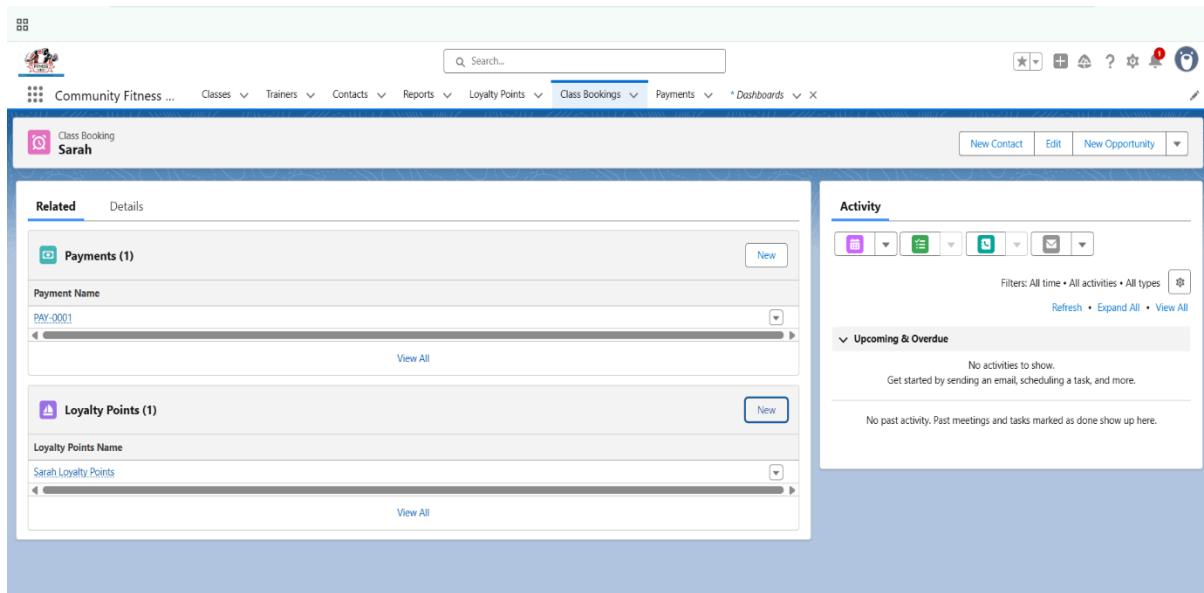
Field Level Security was reviewed to ensure that sensitive fields were only visible to the appropriate profiles.

4.Dashboards

A real-time management dashboard was created to provide a single, consolidated view of the fitness studio's key performance indicators (KPIs). The dashboard included a gauge chart, a bar chart, and a table.



Final Dashboard



Class Booking with Payments/Loyalty Points

5.Dynamic Dashboards

Dynamic dashboards were not implemented. This is a best practice for enterprise environments but was considered out of scope for the project's core functionality.

6.Security Review

- **Sharing Settings**

- Sharing Settings were configured to ensure data privacy. Organization-Wide Defaults (OWD) were set to Private for all custom objects, and sharing rules were implemented to selectively grant access where needed.

The screenshot shows the Salesforce Sharing Settings page. The left sidebar has a search bar and navigation links for Security, Sharing Rule Access, Reports, and Sharing Settings. The main content area is titled "Sharing Settings" and contains a table of sharing rules for various objects. The table has three columns: Object Name, Default Sharing Rule, and Status (indicated by a checkmark). The objects listed include User Provisioning Request, Walllist, Web Cart Document, Work Order, Work Plan, Work Plan Template, Work Step Template, Work Type, Work Type Group, Class, Class Booking, Loyalty Points, Payment, Student, and Trainer. Most objects have a "Private" sharing rule, except for Work Type Group which is "Public ReadWrite". The status column shows a checkmark for each row. Below the table is a section titled "User Visibility Settings" with checkboxes for Portal User Visibility and Site User Visibility.

User Provisioning Request	Private	✓
Walllist	Private	✓
Web Cart Document	Private	✓
Work Order	Private	✓
Work Plan	Private	✓
Work Plan Template	Private	✓
Work Step Template	Private	✓
Work Type	Private	✓
Work Type Group	Public ReadWrite	✓
Class	Private	✓
Class Booking	Private	✓
Loyalty Points	Private	✓
Payment	Private	✓
Student	Public ReadWrite	✓
Trainer	Private	✓

7.Session Settings, Login IP Ranges, & Audit Trail

These were not implemented. Session Settings, Login IP Ranges, and Audit Trail were reviewed and documented as important features for a production environment but were left at their default settings for the scope of this project.

Phase 10: Final Presentation & Demo Day

Google Drive Link:-

https://drive.google.com/file/d/1Wk0g_koVm9BYJeI4kfuUlhicy5SkJIWI/view?usp=drive_link

Youtube Link:- <https://youtu.be/7esATGzyD-I?si=llIDKrb2BHhFXEEzB>