

# Community Fitness & Wellness Hub CRM Project

## 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.

Community Fitness ...

ClassesTrainersContactsReportsLoyalty PointsClass BookingsPayments

Report: Class Bookings  
Class Bookings by Status

Enable Field EditingAdd ChartEdit

Total Records  
1

StatusClass Booking: Class Booking NameClassContact

Booked (1)Sarah- -

Subtotal

Total (1)

Community Fitness ...

ClassesTrainersContactsReportsLoyalty PointsClass BookingsPayments

REPORT

New Class Bookings ReportClass Bookings

Previewing a limited number of records. Run the report to see everything.

Update Preview Automatically

Groups

GROUP ROWS

Add group...

Status

GROUP COLUMNS

Add group...

Columns

Add column...

Class Booking: Class Booking Nar

Class

Contact

StatusClass Booking: Class Booking NameClassContact

Booked (1)Sarah- -

Subtotal

Total (1)

Row CountsDetail RowsSubtotalsGrand Total

Class Bookings by Status

Community Fitness ...

Classes

Trainers

Contacts

Reports

Loyalty Points

Class Bookings

Payments

Search...

REPORT

New Payments with Class Booking Report

Payments with Class Booking

↶

↷

Add Chart

Save & Run

Save

Close

Run

Outline

Filters

Previewing a limited number of records. Run the report to see everything.

Update Preview Automatically

Fields

Groups

GROUP ROWS

Add group...

Class Booking: Class

GROUP COLUMNS

Add group...

Columns

Add column...

Payment: Payment Name

Class Booking: Class Booking Nar

# Amount

Class Booking: Class

Payment: Payment Name

Class Booking: Class Booking Name

Amount

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

Show All payments

Edit other filters in the filter panel.

Row Counts

Detail Rows

Subtotals

Grand Total

Conditional Formatting

Community Fitness ...

Classes

Trainers

Contacts

Reports

Loyalty Points

Class Bookings

Payments

Search...

REPORT

Report: Payments with Class Booking

Total Payments by Class

Enable Field Editing

Add Chart

Edit

Total Records

Total Amount

0

\$0.00

Total Payments by Class

## Total Payments by Class

Community Fitness ...

Classes

Trainers

Contacts

Reports

Loyalty Points

Class Bookings

Payments

Search...

REPORT

Trainer Activity

Classes with Trainer

↶

↷

Add Chart

Save & Run

Save

Close

Run

Outline

Filters

Previewing a limited number of records. Run the report to see everything.

Update Preview Automatically

Fields

Groups

GROUP ROWS

Add group...

Trainer: Trainer Name

GROUP COLUMNS

Add group...

Columns

Add column...

Class: Class Name

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)

Row Counts

Detail Rows

Subtotals

Grand Total

Report: Classes with Trainer  
**Trainer Activity**

Total Records  
3

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)	

Row Counts: ☒ Detail Rows: ☒ Subtotals: ☒ Grand Total: ☒

## Trainer Activity

### 2.Report Types

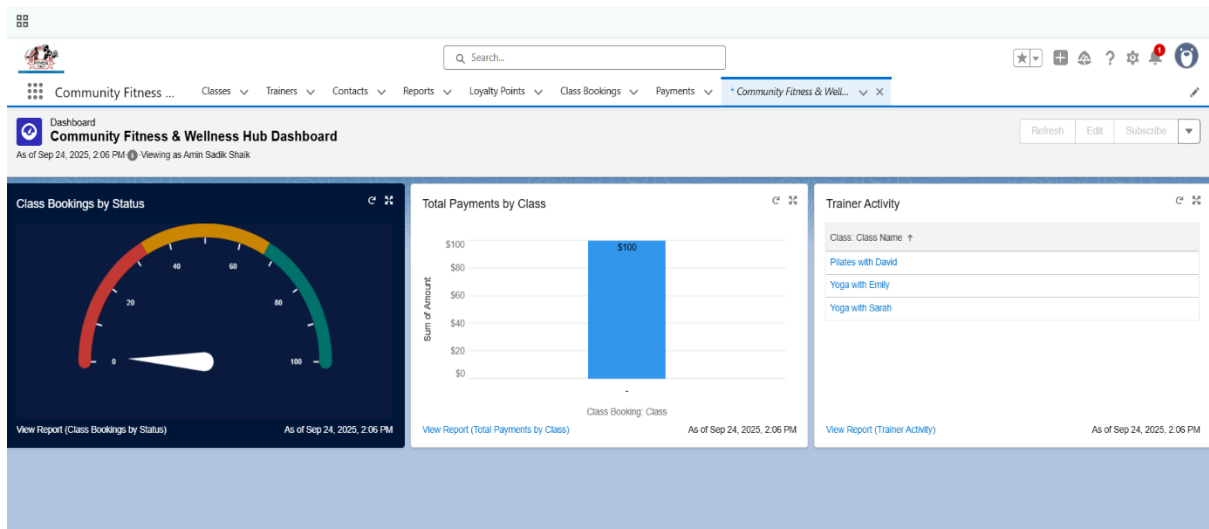
Several report types were used to access the right data, including the Class Booking report type, the custom Payments with Class Bookings report type, and the custom Classes with Trainers report type.

### 3.Field Level Security

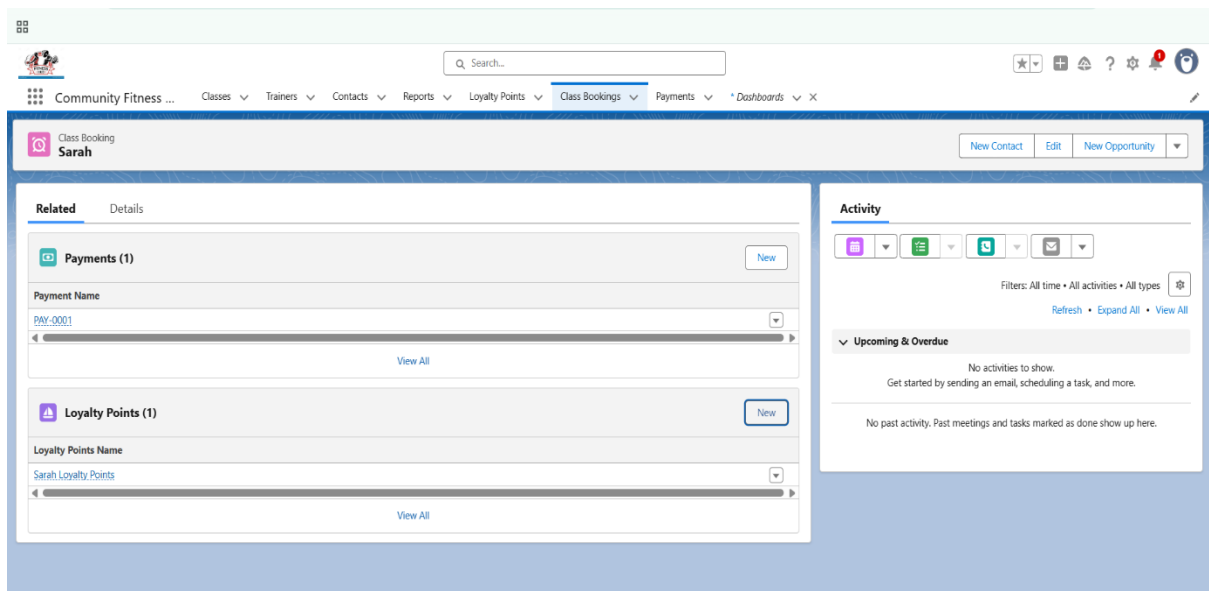
Field Level Security was reviewed to ensure that sensitive fields were only visible to the appropriate profiles.

### 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.

Home | Salesforce x Sharing Settings | Salesforce x +

fitnesshub-dev-ed.develop.lightning.force.com/lightning/setup/SecuritySharing/page?address=%2Fp%2Fown%2F0rgSharingDetail%3FretURL%3D%252Fsetup%252Fhome%26appLayout...

Search Setup

Setup Home Object Manager

Q sharing

Security

Guest User **Sharing** Rule Access Report

**Sharing Settings**

Didn't find what you're looking for? Try using Global Search.

### Sharing Settings

User Provisioning Request	Private	Private	✓
Waitlist	Private	Private	✓
Web Cart Document	Private	Private	✓
Work Order	Private	Private	✓
Work Plan	Private	Private	✓
Work Plan Template	Private	Private	✓
Work Step Template	Private	Private	✓
Work Type	Private	Private	✓
Work Type Group	Public Read/Write	Private	✓
Class	Private	Private	✓
Class Booking	Private	Private	✓
Loyalty Points	Private	Private	✓
Payment	Private	Private	✓
Student	Public Read/Write	Private	✓
Trainer	Private	Private	✓

### User Visibility Settings

Portal User Visibility ☐ [i](#)

Site User Visibility ☐ [i](#)

[User Visibility Settings Help](#)

## 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.