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.

Class Bookings by Status

REPORT ▾
New Payments with Class Booking Report ✎   Payments with Class Booking

Add Chart   Save & Run   Save ▾   Close   Run

☰ Outline   ▼ Filters ①   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... 🔍

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.

Columns ▾

Add column... 🔍

Payment: Payment Name   ✕

Class Booking: Class Booking Nan   ✕

Amount   ✕

Row Counts ✓◯   Detail Rows ✓◯   Subtotals ✓◯   Grand Total ✓◯   ⌁ Conditional Formatting

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Community Fitness ... Classes ⌄ Trainers ⌄ Contacts ⌄ Reports ⌄ Loyalty Points ⌄ Class Bookings ⌄ Payments ⌄

Report: Payments with Class Booking
Total Payments by Class

✎ Enable Field Editing   🔍   Add Chart   ▼   C   Edit ▾

Total Records   Total Amount
0   $0.00

Total Payments by Class

Community Fitness ... Classes ⌄ Trainers ⌄ Contacts ⌄ Reports ⌄ Loyalty Points ⌄ Class Bookings ⌄ Payments ⌄

REPORT ▾
Trainer Activity ✎   Classes with Trainer

Add Chart   Save & Run   Save ▾   Close   Run

☰ Outline   ▼ Filters ①   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... 🔍

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)	

Columns ▾

Add column... 🔍

Class: Class Name   ✕

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.
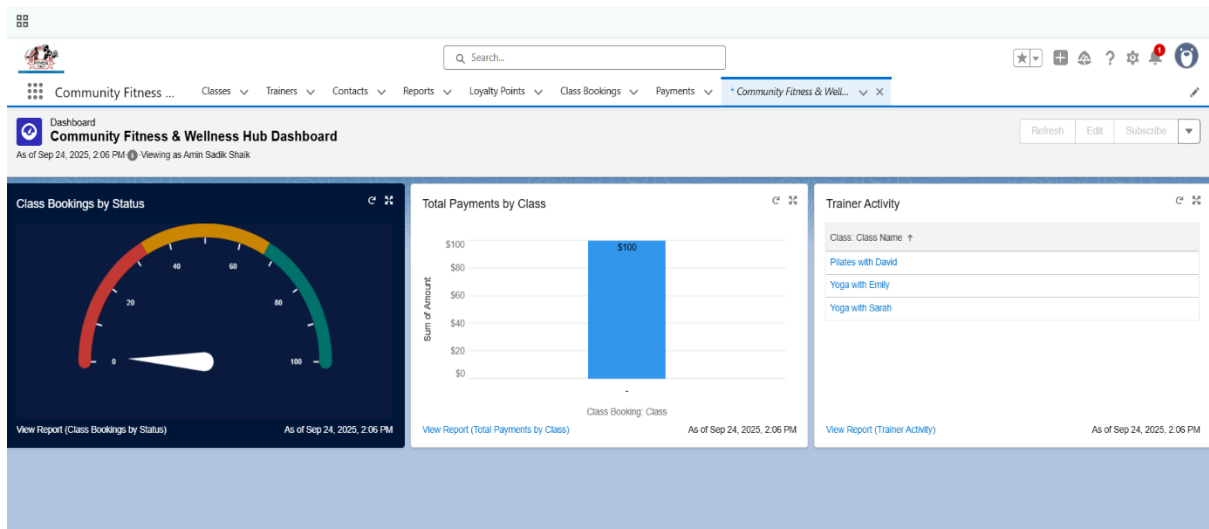
Final Dashboard
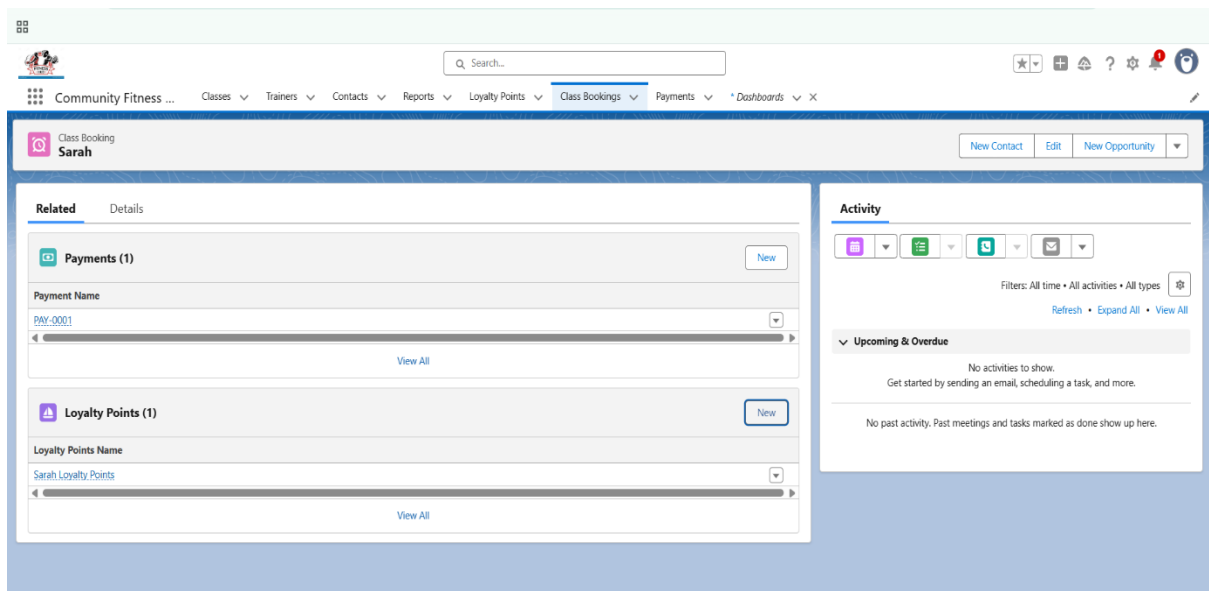
Class Booking with Payments/Loyalty Points

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**
    - o 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.

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.