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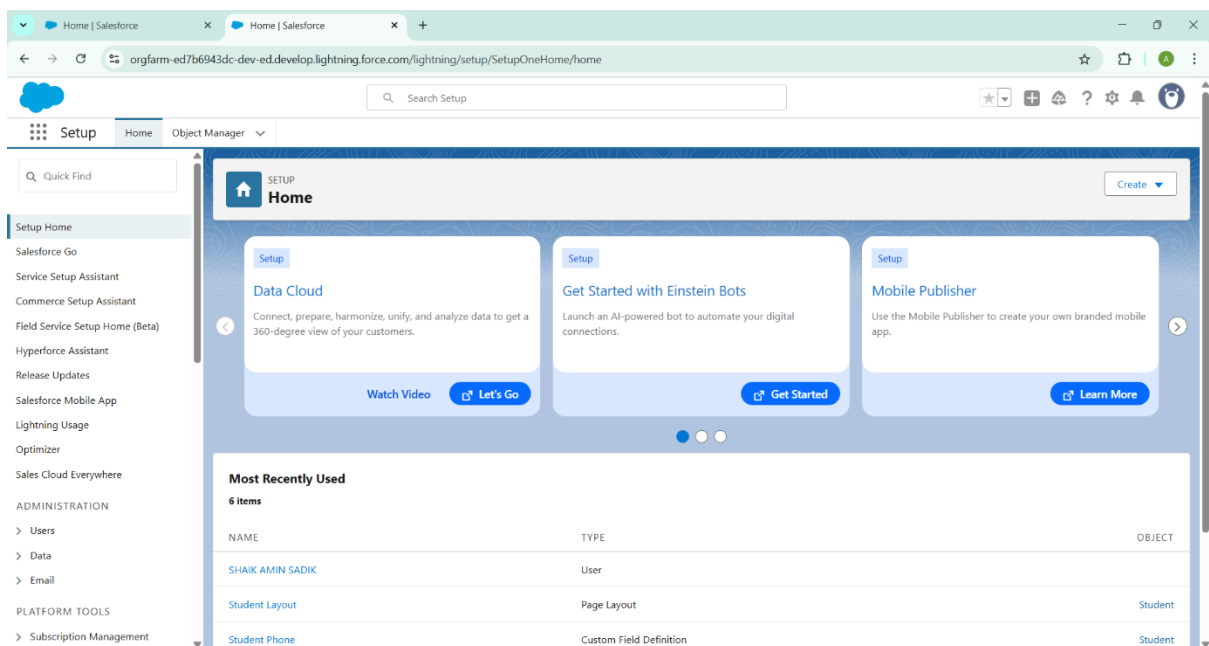
2.Company Profile Setup: The organization's profile, including name, contact information, and default time zone, was reviewed and configured to ensure an accurate and professional starting point for the project.

- Verified and updated:

    o Company name

    o Default locale, currency, time zone, and language

    o Primary contact details

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.

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.**

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**.

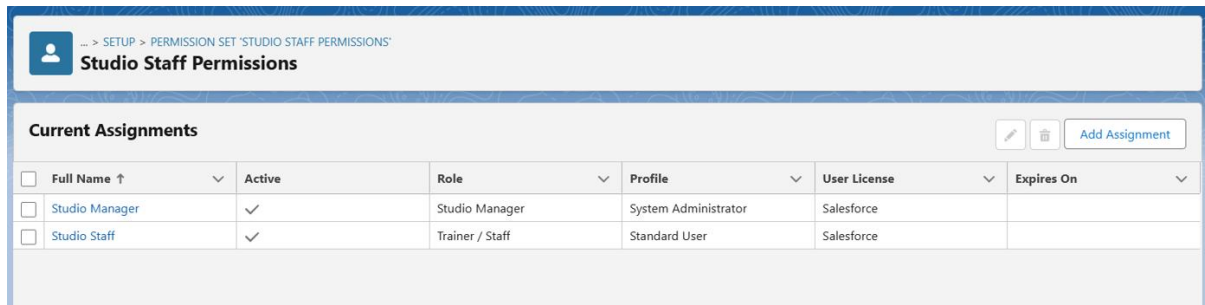## 8. Permission Sets

- 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.
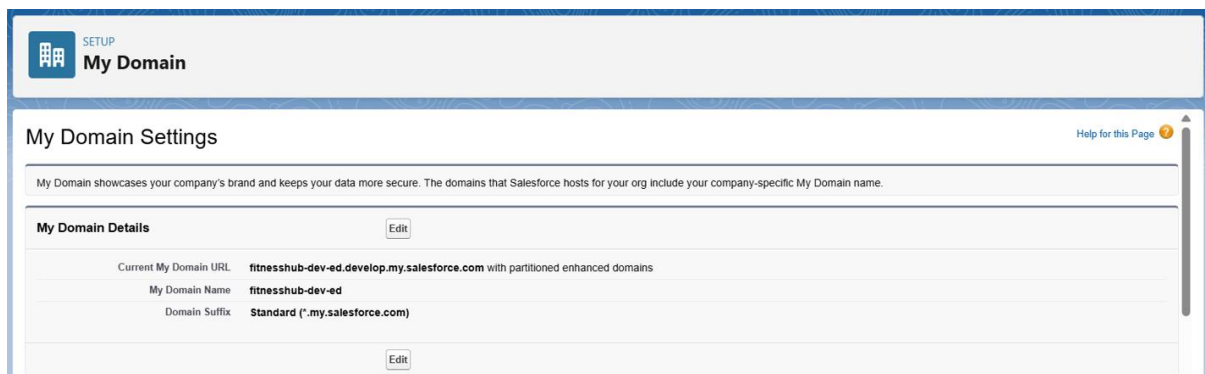

9.OWD (Organization-Wide Defaults): This was not implemented in Phase 2. **OWD will be configured in Phase 3** after custom objects have been created. This is a critical step to ensure data privacy by setting the baseline access to private.

10.My Domain

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

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.
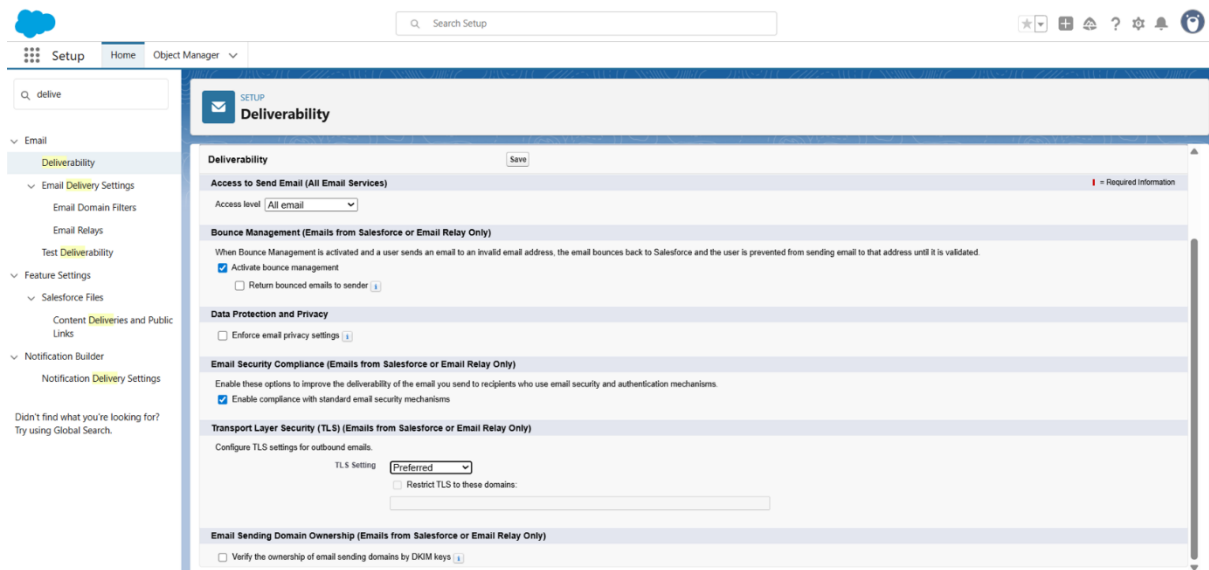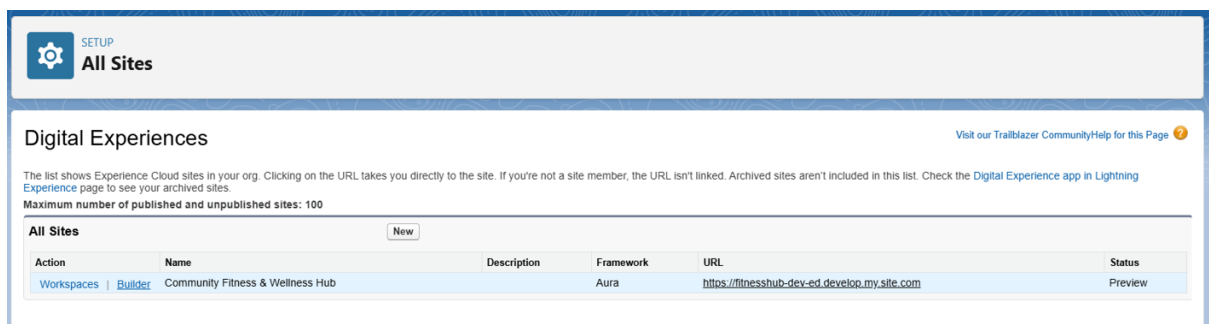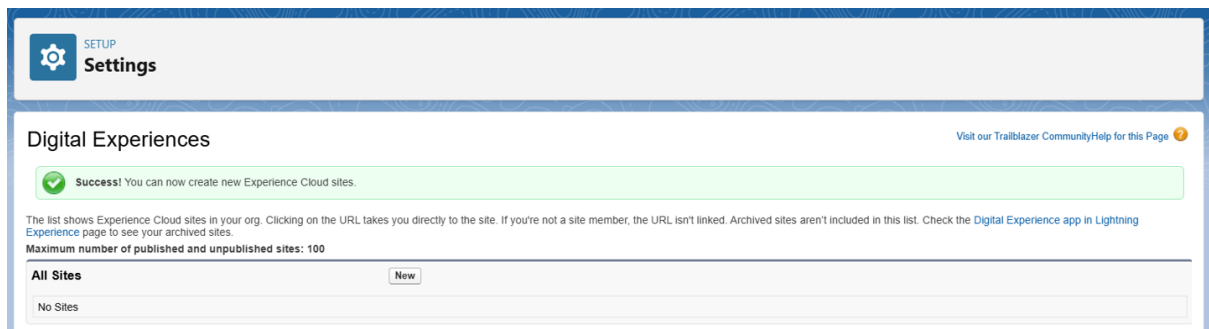
14. Experience Cloud

- 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.