

Phase 2: Org Setup & Configuration – FitCRM (Fitness & Client Relationship Management System)

0. Preliminaries

1. Sign up / log into **Salesforce Developer Edition** (<https://developer.salesforce.com>).

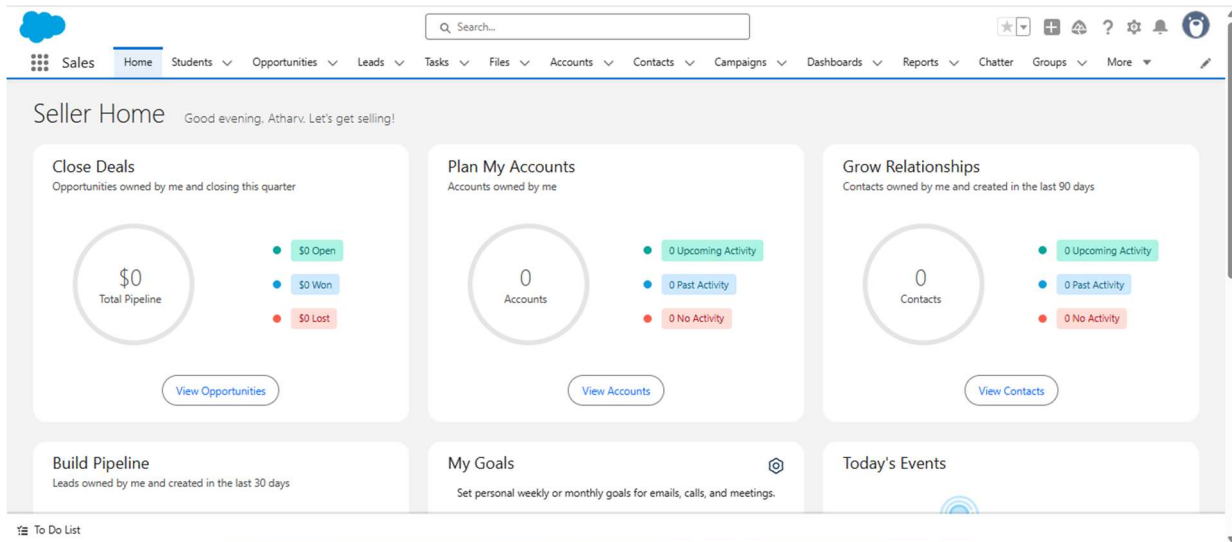


Figure 1 Developer Org home

1. Company Profile (Company Information)

1. Setup → Quick Find: Company Information → Open.
2. Edit → set Organization Name = **FitCRM**
 - Set Default Time Zone = Asia/Kolkata, Default Currency = INR. → Save.

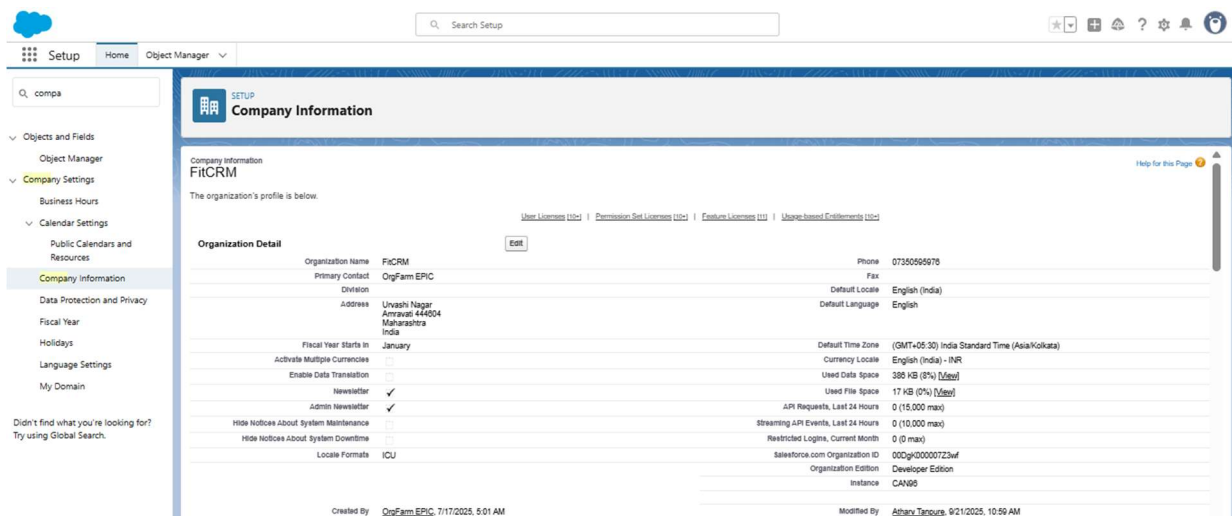


Figure 2 Company info with org name, timezone, currency.

2. Business Hours & Holidays

1. Setup → Quick Find: **Business Hours** → New Business Hours.
 - Label: Gym Hours → Set Mon–Sat 06:00 AM–10:00 PM
→ Save.

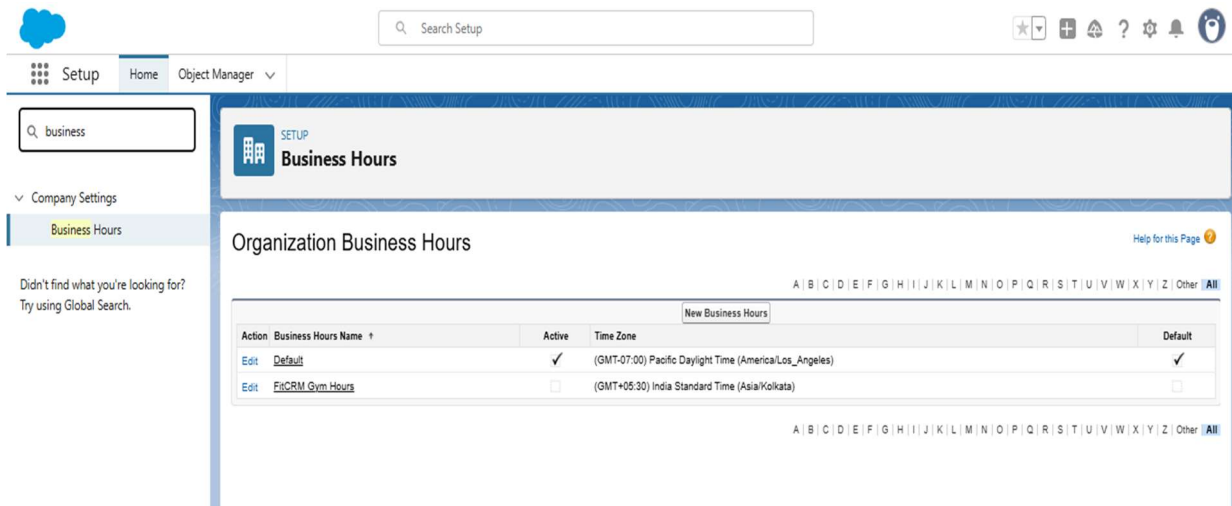


Figure 3 Business Hours

Setup → Quick Find: **Holidays** → New Holiday.

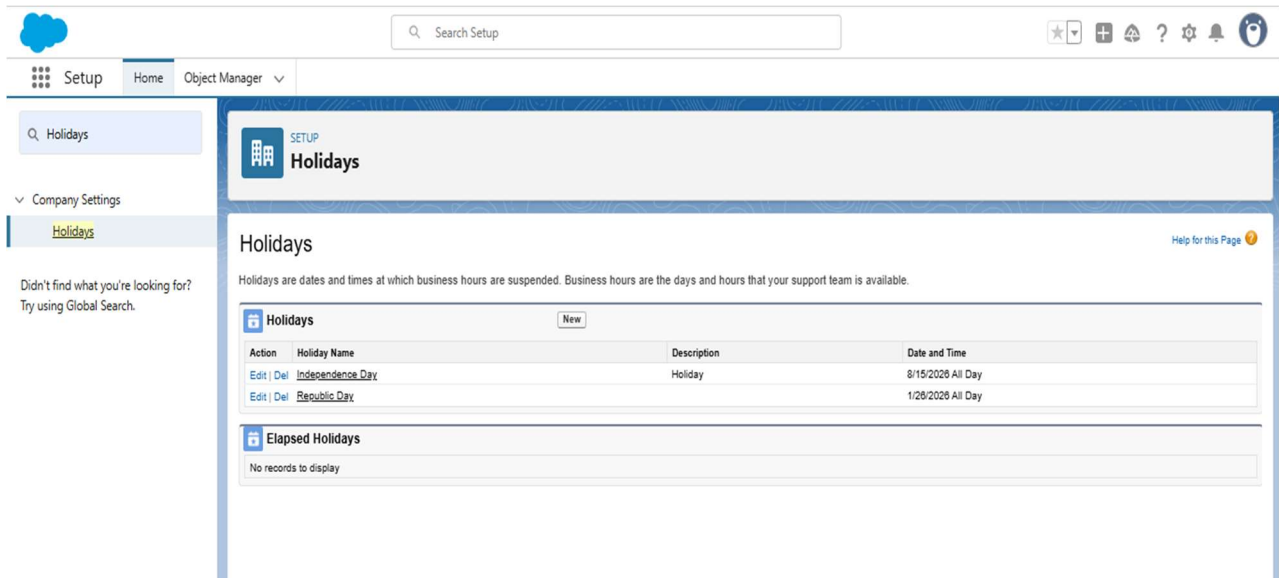


Figure 4 Holidays

3. Fiscal Year

1. Setup → Quick Find: **Fiscal Year** → Verified default fiscal year (Standard). set **April-March**.

The screenshot shows the Salesforce Setup interface. On the left, the 'Setup' menu is open, and 'Fiscal Year' is selected under 'Company Settings'. The main content area is titled 'Organization Fiscal Year Edit: FitCRM'. It contains a 'Fiscal Year Information' section with a warning about changing fiscal periods. Below this is a 'Change Fiscal Year Period' form. The form has a 'Name' field set to 'FitCRM', a 'Fiscal Year Start Month' dropdown set to 'April', and a 'Fiscal Year is Based On' section with 'The starting month' selected. 'Save' and 'Cancel' buttons are present at the bottom of the form.

Figure 5 Fiscal Year

4. Create Sample Users & Assign Licenses

1. Setup → Quick Find: **Users** → Users → New User. Create three users:
 - Gym Admin — admin@fitcrm.com — Profile: System Administrator
 - Gym Trainer — trainer@fitcrm.com — Profile: Standard Platform User
 - Reception Staff — reception@fitcrm.com — Profile: Standard Platform User
2. Fill First/Last name, Username (unique), Email, License = Salesforce or Platform if available. Save

The screenshot shows the Salesforce Setup interface for 'Users'. The left sidebar shows 'Users' selected under 'User Management Settings'. The main content area is titled 'All Users' and shows a list of users. The table below contains the data for these users.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatter_00dsk000007z3wfuac.newkac3hnh7e@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	QEPIC_OrgFarm	QEPIC	epic_e7e31a53b997@orgfarm.salesforce.com		✓	System Administrator
<input type="checkbox"/> Edit	Gym Admin	agvm	admin@fitcrm.com		✓	System Administrator
<input type="checkbox"/> Edit	Staff Reception	rsta	reception@fitcrm.com		✓	Standard Platform User
<input type="checkbox"/> Edit	Tanour Atharv	ita	itameatharv.tanour@45@agentforce.com		✓	System Administrator
<input type="checkbox"/> Edit	Trainer Gym	gymtrain	trainer@fitcrm.com		✓	Standard Platform User
<input type="checkbox"/> Edit	User Integration	integ	integration@00dsk000007z3wfuac.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightssecurity@00dsk000007z3wfuac.com		✓	Analytics Cloud Security User

Figure 6 Sample Users

5. Role Hierarchy

1. Setup → Quick Find: **Roles** → Click **Set Up Roles** → Expand and **Add Role**:
 - Top Role: Gym Head Admin
 - Child under Relief Head: Reception Staff
 - Child under Regional Coordinator: Trainers
2. Save.

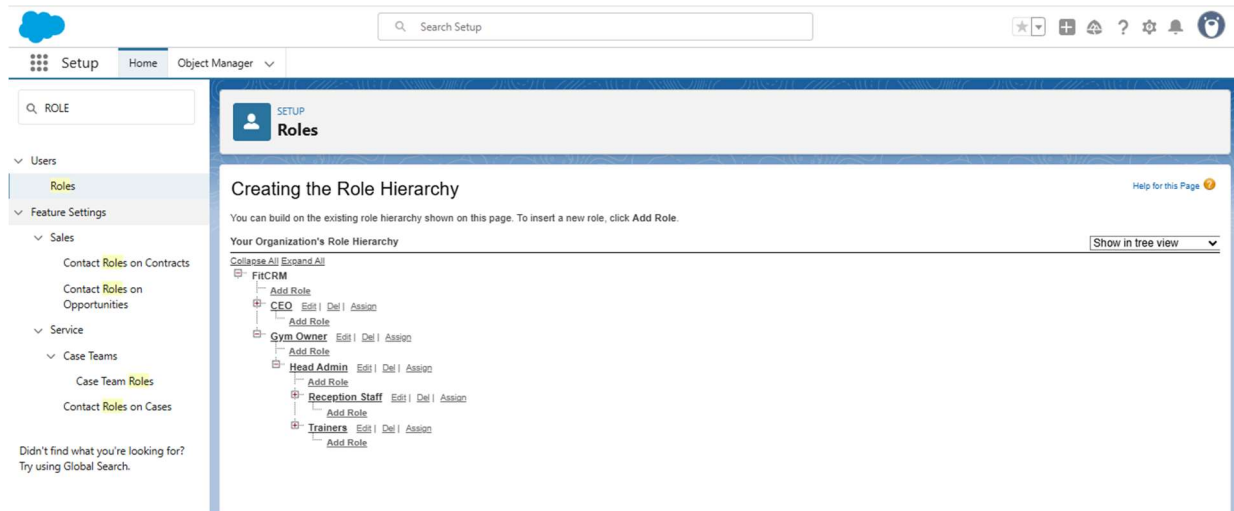


Figure 7 Role hierarchy tree (Gym Head Admin > Reception Staff> Trainers).

6. Profiles (clone & edit)

3. Setup → Quick Find: **Profiles** → Open Standard User → Click **Clone** → Name: FitCRM Admin.
4. Clone another profile → Reception Profile

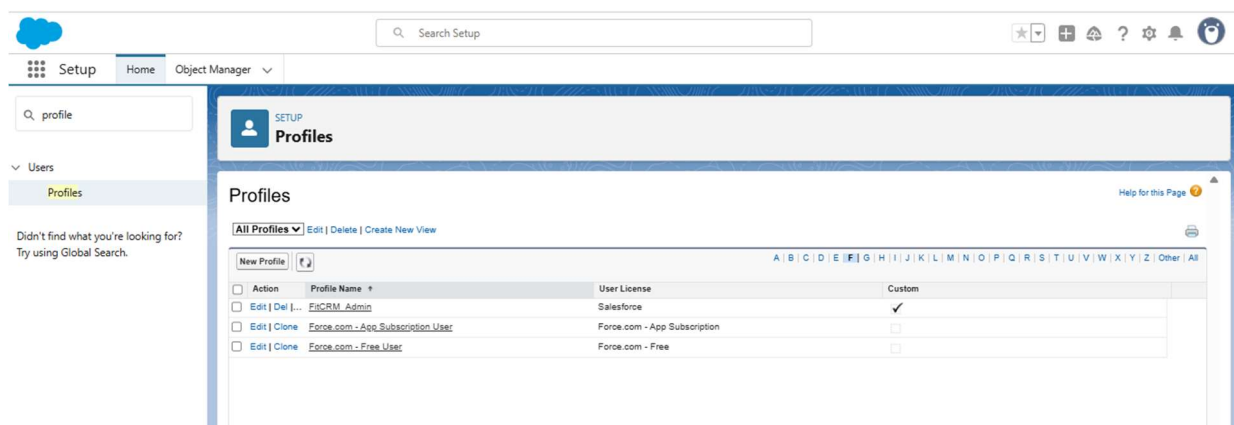


Figure 8 Coordinator Profile object permissions

7. Organization-Wide Defaults (OWD)

5. Setup → Quick Find: **Sharing Settings** → Edit.
6. Set defaults:
 - **Member** → Private
 - **Attendance** → Private
 - **Payments** → Private
 - **Referral** → Public Read/Write
 - **Trainer** → Public Read Only
7. Save.

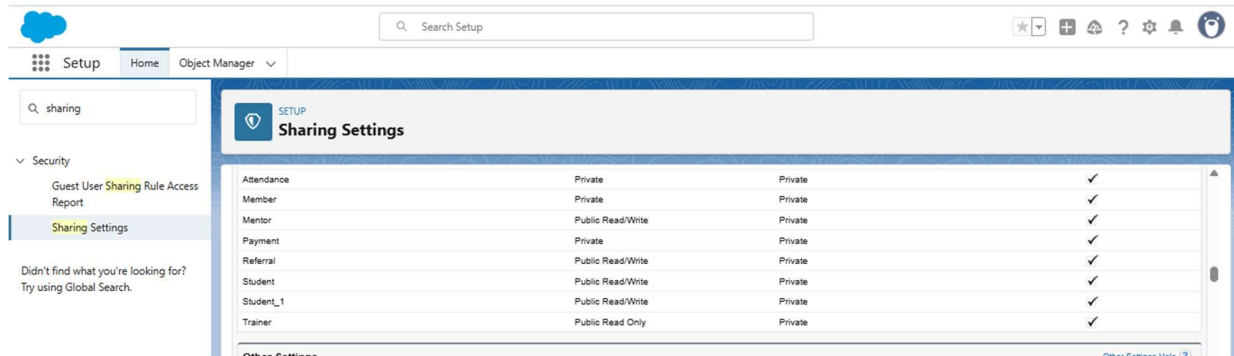


Figure 9 OWD table

8. Create Lightning App (FitCRM)

8. Setup → Quick Find: **App Manager** → New Lightning App.
 - App Name: FitCRM → Branding icon added → Next.
 - Add Nav Items: Home, Members, Attendances, Payments, Referrals, Trainers, Reports, Dashboards → Save & Finish.

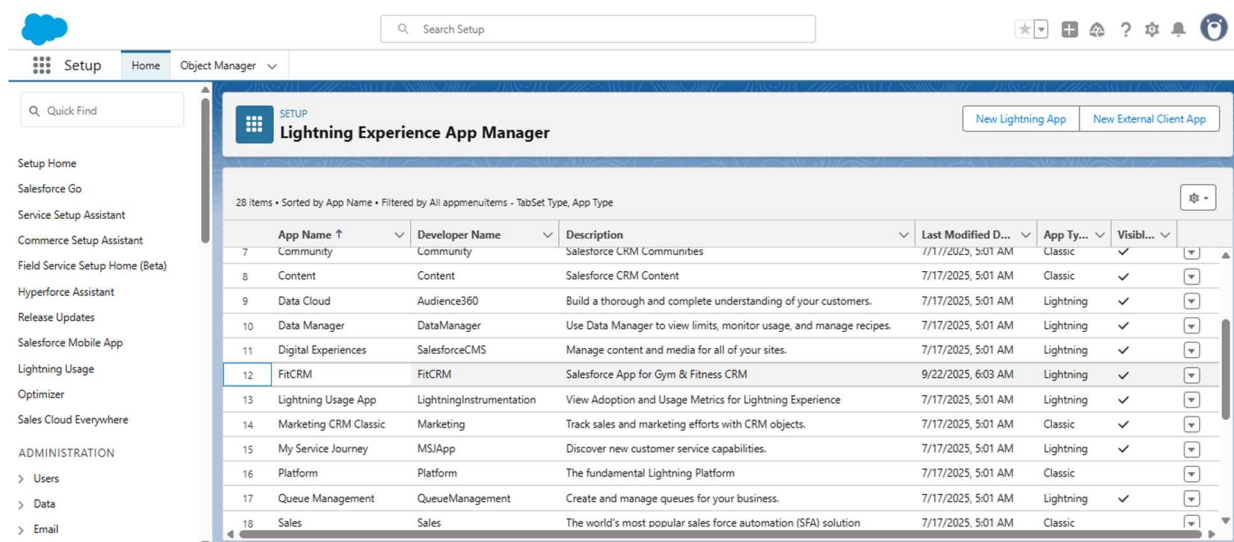


Figure 10 App Manager

App Launcher → search for FitCRM → click → FitCRM App is opened

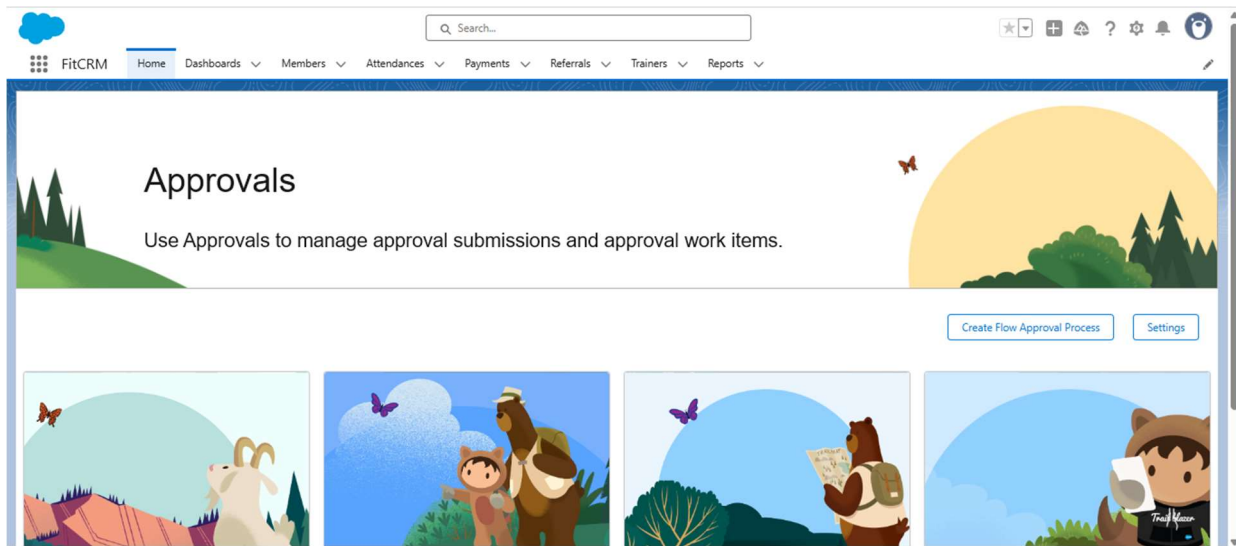


Figure 11 FitCRM App