

FitCRM — Phase 10: Final Project Summary

Introduction

The FitCRM project was developed as a comprehensive Salesforce application to manage a fitness center's operations. The system was designed and implemented in multiple phases, covering administration, development, integration, and reporting. This document provides a summary of all phases (1–9).

Phase 1 — Project Planning

Defined project scope, objectives, and identified Salesforce features to be used. The main use cases included managing Members, Trainers, Membership Plans, Attendance, Referrals, and Payments. Business requirements were translated into Salesforce capabilities. High-level planning ensured that later phases aligned with overall project goals.

Phase 2 — Org Setup & Configuration

Set up Salesforce org basics including Company Profile, Business Hours, Fiscal Year, Users, Profiles, Roles, OWD, and Sharing Rules. Created baseline profiles (Admin, Trainer, Reception). Sandbox usage and deployment basics were also explored. This phase provided a solid foundation to enforce security and access control.

Phase 3 — Data Model & Record Types

Created custom objects: Member, Trainer, MembershipPlan, Attendance, Payment, Referral. Added fields, record types (Monthly, Annual Membership), page layouts, compact layouts, and schema builder diagrams. Picklist value sets were defined for consistency across objects. The schema ensured relationships between Members, their Plans, Payments, and Attendance were clear.

Phase 4 — Process Automation

Implemented Validation Rules, Approval Process for high-value Payments, Workflow Rules, and Process Builder. Created Flows for Payment Failure Alerts and Membership Expiry Reminders. Used Email Alerts and Custom Notifications for Trainers and Reception staff. This phase automated routine tasks and improved operational efficiency for the fitness center.

Phase 5 — Apex Programming

Skipped for this project. Declarative automation (Flows, Process Builder) was sufficient for requirements. Apex was acknowledged as a powerful tool for complex use cases but deemed unnecessary here. The decision allowed focusing on point-and-click Salesforce features. This choice simplified the implementation without compromising requirements.

Phase 6 — User Interface Development

Used Lightning App Builder to create Record Pages for Member, Membership, Payment, Attendance, Referral, and Trainer. Built custom Home Page layouts and Utility Bar. Created Lightning Web Components integrated with Apex for displaying Membership Expiry, Attendance tracking, and Payment reminders. The UI design ensured user-friendly navigation and quick access to essential information.

Phase 7 — Integration & External Access

Explored integration features. Platform Events were implemented (PaymentEvent_e). Named Credentials, External Services, Salesforce Connect, and OAuth were noted but not required for project scope. This demonstrated awareness of integration possibilities. Future enhancements could include external payment gateway integration via Named Credentials.

Phase 8 — Data Management & Deployment

Imported data for Trainers, Membership Plans, and Members using Data Import Wizard. Performed data backup with Data Export. Deployment tools (Data Loader, Change Sets, SFDX) were reviewed but skipped. This phase ensured the system was loaded with real data for testing. Backup processes provided safety against accidental data loss.

Phase 9 — Reporting, Dashboards & Security Review

Built Reports and Dashboards to monitor Memberships, Payments, Attendance, and Referrals. Reviewed security including OWD, Sharing Rules, Session Settings. Dashboards provided visual insights into gym operations. Security measures guaranteed data confidentiality and integrity.

Conclusion

The FitCRM project successfully demonstrated how Salesforce can be used to build a complete CRM solution for fitness centers. All major aspects were covered from data modeling to automation, UI development, integration, and reporting. The system is scalable, secure, and meets the academic/demo project requirements. FitCRM can be extended in the future with Apex development and external integrations for advanced use cases.