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).
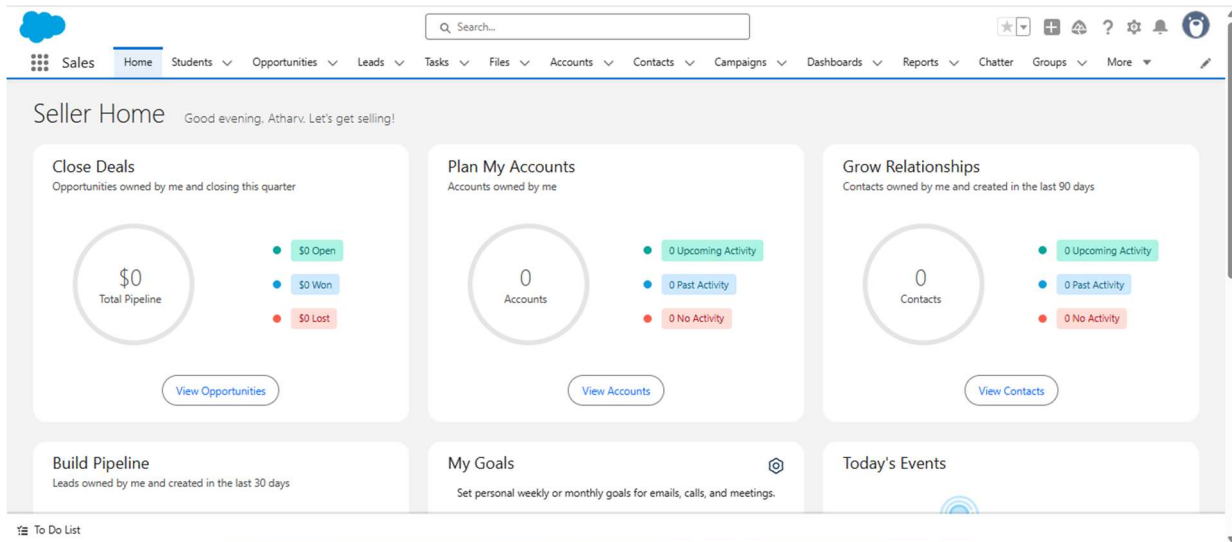

Figure 1 Developer Org home

1. Company Profile (Company Information)

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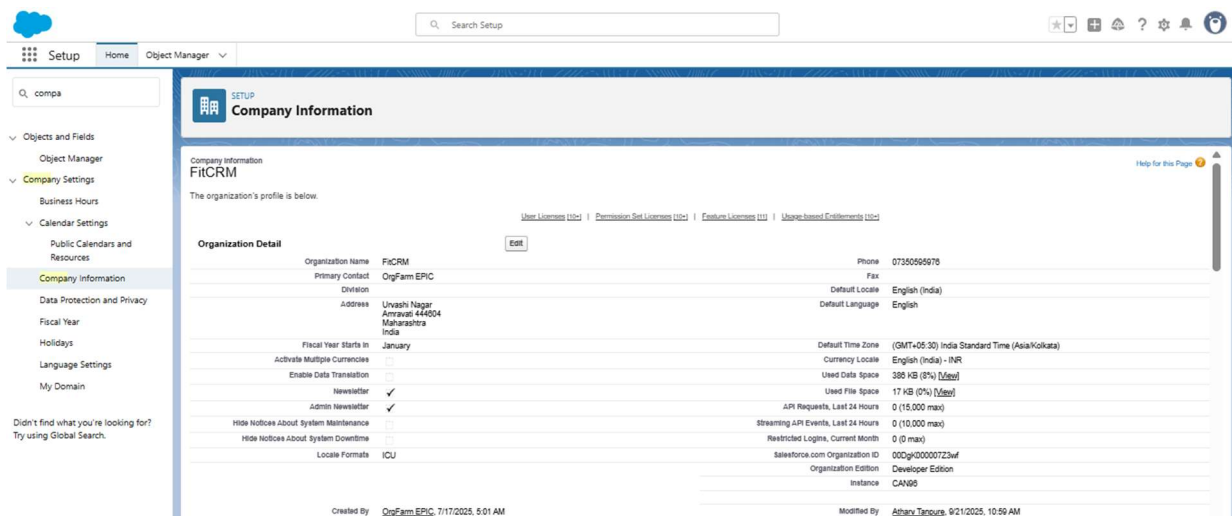   o Set Default Time Zone = Asia/Kolkata, Default Currency = INR. → Save.

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

2. Business Hours & Holidays

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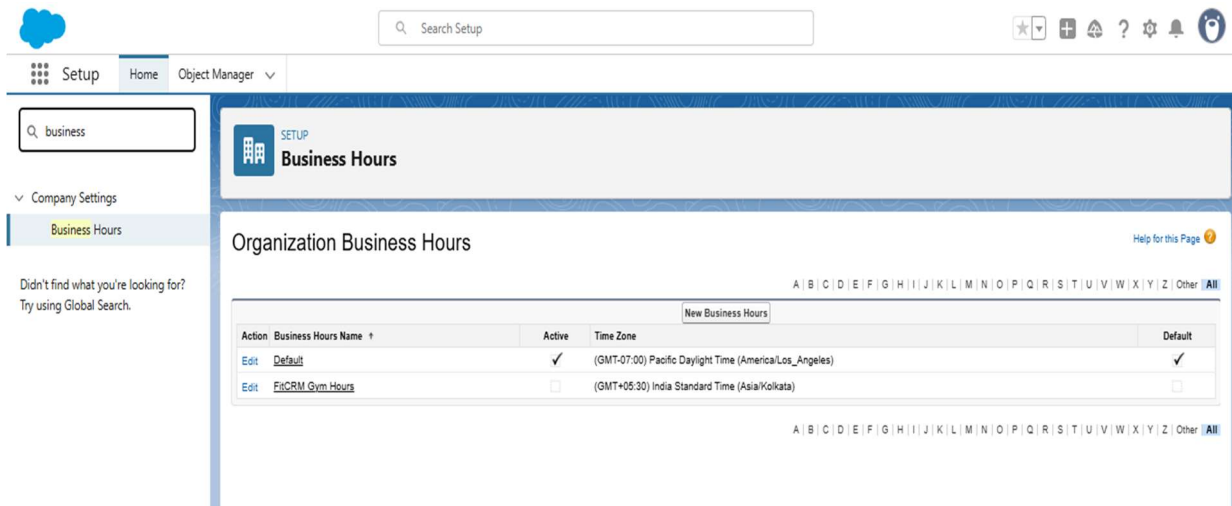   → Save.

Figure 3 Business Hours
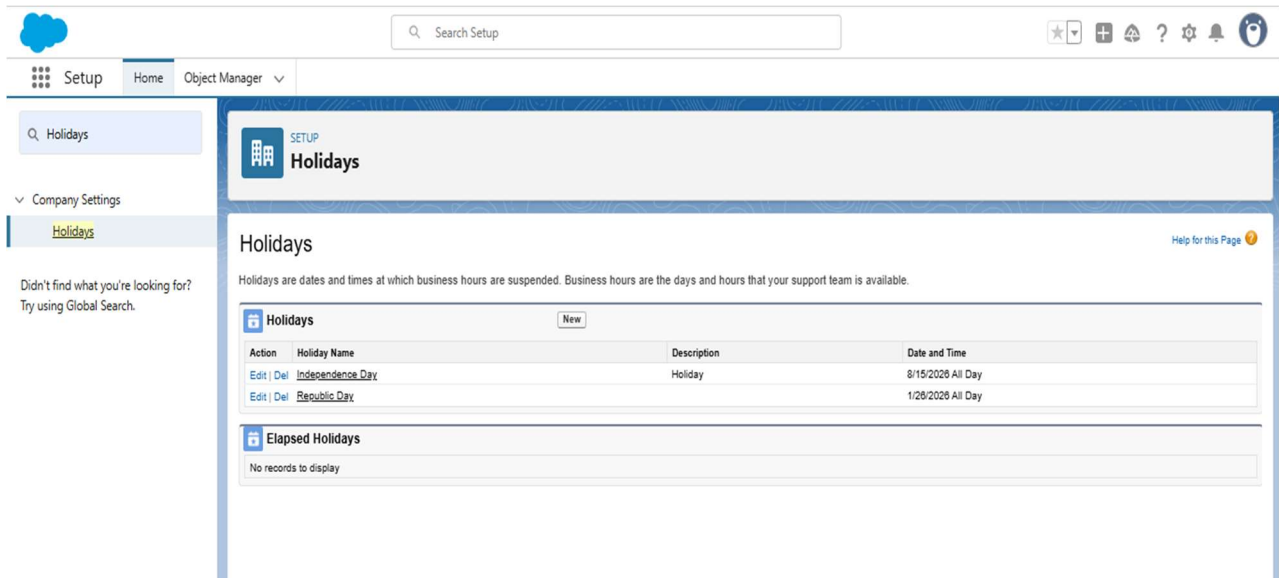
Setup → Quick Find: **Holidays** → New Holiday.

Figure 4 Holidays

3. Fiscal Year

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

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

Figure 6 Sample Users

5. Role Hierarchy

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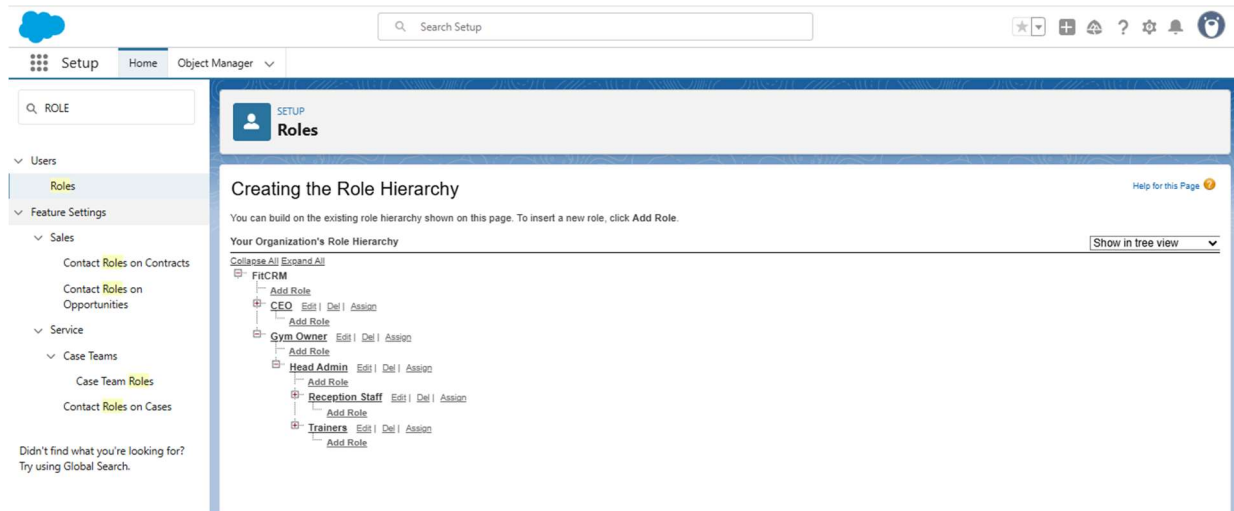   o Child under Regional Coordinator: Trainers
2. Save.

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.
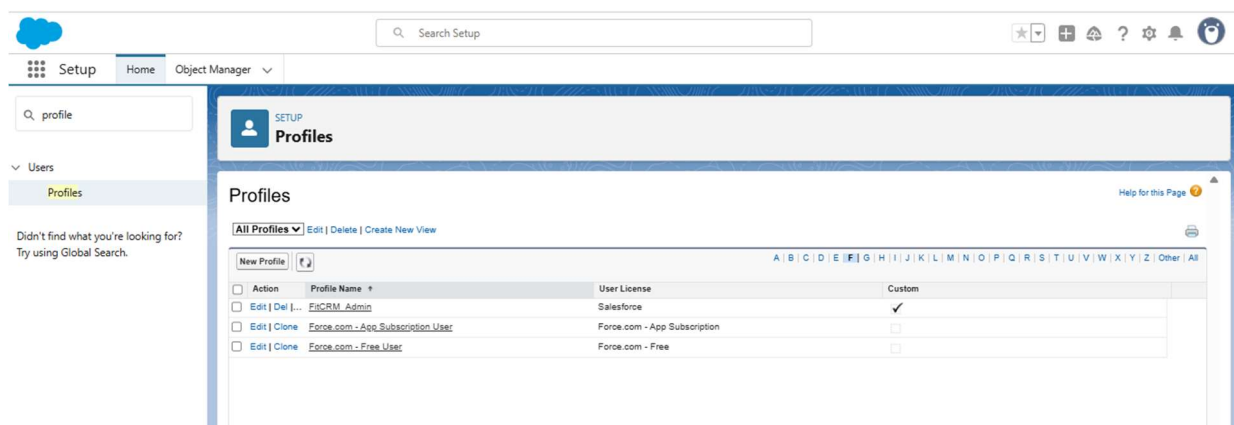4. Clone another profile → Reception Profile

Figure 8 Coordinator Profile object permissions

7. Organization-Wide Defaults (OWD)

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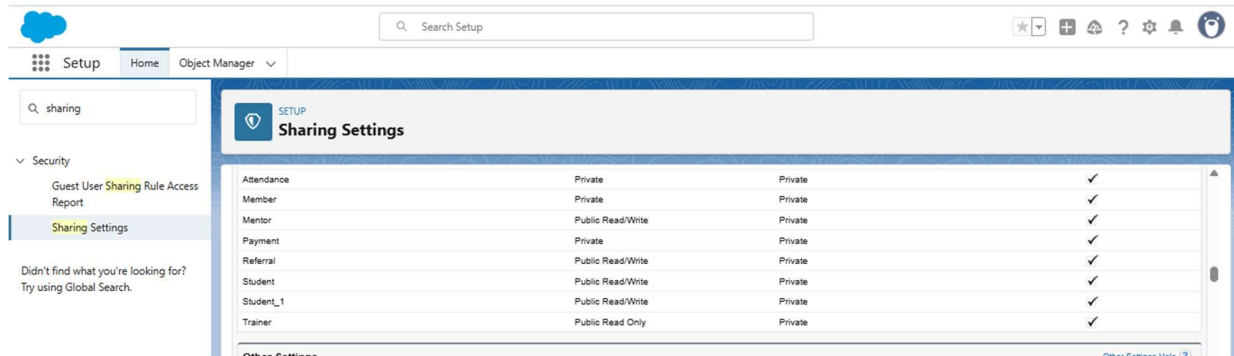7. Save.

Figure 9 OWD table

8. Create Lightning App (FitCRM)

8. Setup → Quick Find: **App Manager** → New Lightning App.

    o App Name: FitCRM → Branding icon added → Next.

    o Add Nav Items: Home, Members, Attendances, Payments, Referrals,
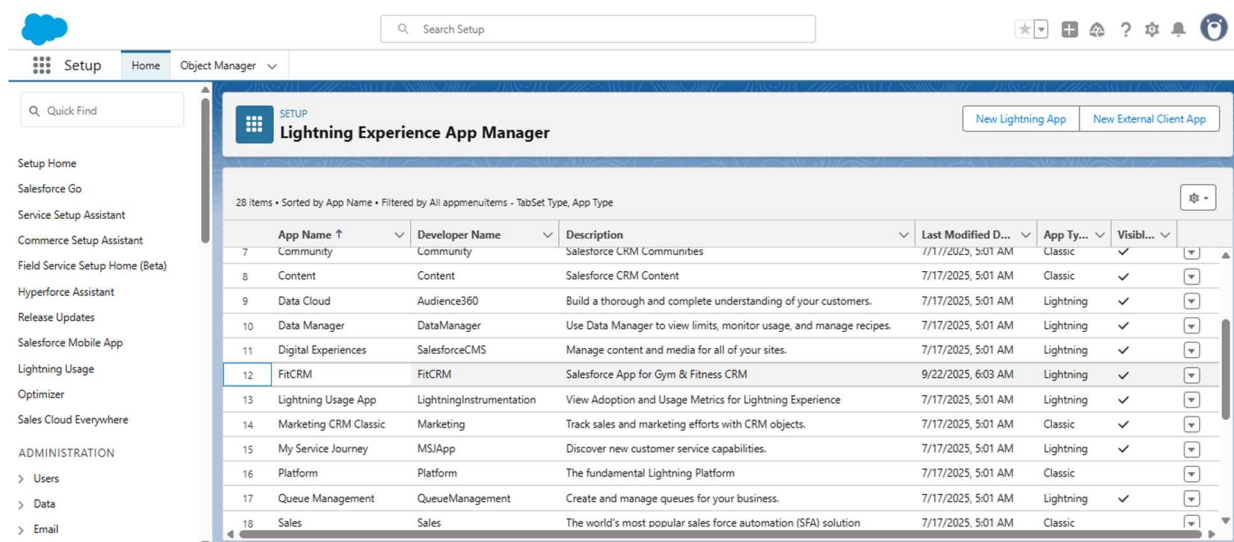
    Trainers, Reports, Dashboards → Save & Finish.

Figure 10 App Manager

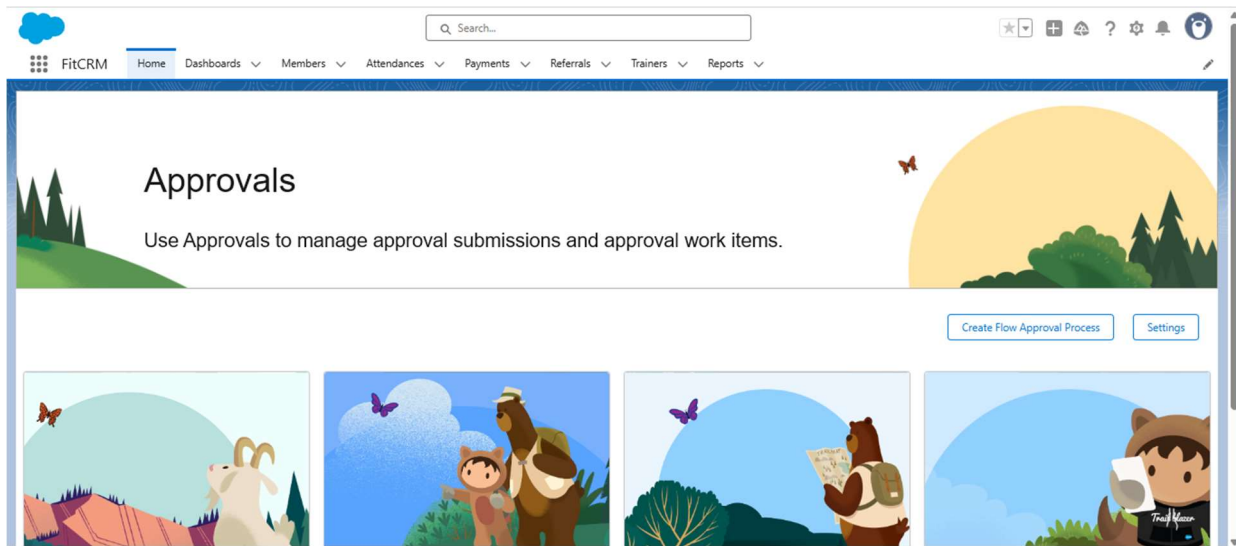App Launcher → search for FitCRM → click → FitCRM App is opened

Figure 11 FitCRM App