Barber Appointment Booking CRM on Salesforce

Phase 1: Problem Understanding & Industry Analysis

👉 Goal: Understand what we're building and why.

1. Requirement Gathering

- Track all services (haircut, shave, hair color) with their duration and price.

- Allow customers to book appointments with specific barbers.

- Prevent overlapping bookings.

- Add automatic breaks between appointments.

- Apply cancellation charges based on timing.

- Generate revenue & utilization reports.

2. Stakeholder Analysis

- Admin: Manages Salesforce setup.

- Barbers: Provide services, view schedules.

- Receptionist/Agent: Books appointments for walk-in/customers.

- Manager/Owner: Views reports, sets pricing & policies.

- Customers: Book/cancel appointments (via portal or receptionist).

3. Business Process Mapping

Customer selects service → system shows barber availability → appointment booked → confirmation sent → if cancelled, charges applied → payment processed.

4. Industry-Specific Use Case Analysis

- Service durations differ (haircut 30 mins, hair color 1 hr, beard trim 20 mins).

- Must account for barber breaks + cancellation penalties.

5. AppExchange Exploration

- Apps like "Salon Booking" exist, but building a custom Salesforce solution gives flexibility.

Phase 2: Org Setup & Configuration

👉 Goal: Prepare Salesforce environment.

- Use Developer Org (free).

- Configure company info, time zone, currency.

- Define shop working hours (10 AM – 8 PM) and holidays.

- Setup users: Admin, Barber, Receptionist, Manager.
- Define Profiles, Roles, Permission Sets

Phase 3: Data Modeling & Relationships

👉 Goal: Build data structure.

Objects: - Contact (Customer, standard). Barber, Service, Appointment, Break (custom).

Relationships:

- Appointment → Barber (Lookup).
- Appointment → Service (Lookup).
- Appointment → Customer (Lookup).

Phase 4: Process Automation (Admin)

👉 Goal: Automate tasks.
- Validation Rules (end time > start time, no overlaps).
- Flows: Booking, Cancellation, Notifications.
- Email alerts: confirmation, cancellation.
- Tasks: Notify barbers.

Phase 5: Apex Programming (Developer)

👉 Goal: Advanced logic.
- Apex Triggers: prevent overlap, apply cancellation charges, enforce breaks.
- Service Duration + Break calculation.
- Batch Apex: daily reminders.
- Scheduled Apex: daily schedules.
- Future Methods: payment gateway callouts.

Phase 6: User Interface Development

👉 Goal: User-friendly booking system.

- Lightning App: "Barber Booking CRM".

- Record Pages: Appointments with Service, Barber, Customer.

 - LWC: Service selection, slot availability, cancel appointment, barber schedule calendar.

Phase 7: Integration & External Access

👉 Goal: Connect with outside systems.

- Stripe/PayPal API → payments.

 - Google Calendar Sync → barber availability.

- Twilio/WhatsApp SMS API → reminders & cancellations.

- Experience Cloud Site → customer self-booking.

Phase 8: Data Management & Deployment

👉 Goal: Manage data & move changes.

 - Data Import Wizard & Data Loader for demo data.

Phase 9: Reporting, Dashboards & Security Review

👉 Goal: Monitor shop & secure data.

 - Reports: Appointments by Barber, Revenue by Service, Cancellation Charges.

- Dashboards: Barber Utilization, Service Popularity.

- Security: Field-level security

Phase 10: Final Presentation & Demo Day

👉 Goal: Wrap up like a real project delivery.

- Demo: Booking → Cancellation → Reports.

- Handoff Documentation: Flows, User Guide.

- Showcase on LinkedIn Portfolio.