**Project Title: Inquiry Management and Auto-Response System  
Industry**: Suitable for Education, Retail, Services, Finance  
**Project Type**: Salesforce Lead Management Application **Target Users**: Support Staff, Sales Teams, Customers/Students/Clients

**Problem Statement:**Organizations receive frequent inquiries via forms, emails, or chat. Manual tracking delays response and follow-up, resulting in missed opportunities and low customer satisfaction.

**Solution:**Create a Salesforce app to capture all incoming inquiries, assign them automatically, and send instant confirmation or auto-response to the sender.

**Phase 1: Problem Understanding & Industry Analysis**

* **Requirement Gathering:** Identify and document the key needs and challenges from all stakeholders.
* **Stakeholder Analysis:**
  + Sales/support team (high interaction with customers)
  + Managers (monitoring metrics and team performance)
  + IT/Admin (system maintenance)
* **Business Process Mapping**: Document the current flow: Customer inquiry → Manual logging → Follow-up → Resolution.
* **Industry-Specific Use Case Analysis:** For example, a college receives course inquiries via website forms; Salesforce logs each inquiry, sends an instant “Thank you, we’ll respond soon,” and routes to admissions staff.
* **AppExchange Exploration:** Explore lead/inquiry management apps for possible extensions or templates.

## **Phase 2: Org Setup & Configuration Steps**

* Selected appropriate Salesforce Edition.
* Set up Company Profile with organization info, fiscal year, time zone, and currency.
* Configured Business Hours and added official Holidays.
* Defined Fiscal Year settings (standard or custom).
* Created and assigned Users, User Licenses, and Profiles.
* Established Role hierarchy and set up Permission Sets.
* Set Organization-Wide Defaults (OWD) for record access.
* Created Sharing Rules for data visibility.
* Set Login Access Policies (login hours, IP ranges, security).
* Set up Developer Edition and Sandboxes for testing and development.

## **Phase 3: Data Modeling & Relationships**

* Create standard and custom objects (e.g., Inquiry).
* Add necessary fields for tracking inquiry details.
* Set up record types and page layouts as needed.
* Design relationships: Lookup or Master-Detail.
* Use junction objects if mapping multiple relationships.

## **Phase 4: Process Automation (Admin)**

* Implement validation rules for data accuracy.
* Build workflow rules or process builder for auto-assigning inquiries and auto-responses.
* Set up approval processes for escalation.
* Design flows for sending confirmations and reminders.
* Configure email alerts, field updates, tasks, and custom notifications.

## **Phase 5: Apex Programming (Developer)**

* Write Apex classes and triggers for custom logic.
* Use SOQL/SOSL for data queries.
* Implement batch, queueable, and scheduled Apex for bulk processing.
* Build proper exception handling and test classes.

## **Phase 6: User Interface Development**

* Use Lightning App Builder to create user-friendly apps.
* Customize record pages, tabs, home layouts, and utility bar.
* Develop Lightning Web Components for dynamic UI.
* Wire adapters and navigation for interactive features.

## **Phase 7: Integration & External Access**

* Configure named credentials and remote site settings.
* Integrate with external services or web APIs (REST/SOAP).
* Set up platform events and change data capture if needed.
* Apply OAuth for authentication.

## **Phase 8: Data Management & Deployment**

* Use Data Import Wizard/Data Loader for bulk data actions.
* Set duplicate rules to avoid multiple entries.
* Export and back up data regularly.
* Deploy changes using change sets or packages.

## **Phase 9: Reporting, Dashboards & Security Review**

* Build reports and dashboards for tracking inquiries and response metrics.
* Apply sharing settings and field-level security.
* Set up session controls and audit trails for compliance.

## **Phase 10: Final Presentation & Demo**

* Prepare and deliver a project presentation.
* Walk through the demo of all key workflows.
* Collect stakeholder feedback.
* Provide handoff documentation for system