Project Title: Bike Rental Management System

Small rental businesses often struggle to manage bookings, customer interactions, and fleet availability due to reliance on manual processes, phone calls, or spreadsheets. This leads to issues such as double-bookings, delayed maintenance, missed payments, and poor customer experiences. For small businesses and startups, these inefficiencies result in reduced profitability and lower customer satisfaction.

To address this, there is a need for a Salesforce-based Bike Rental Management System that extends standard Salesforce objects, automates booking confirmations and reminders, and leverages Salesforce Reports and Dashboards to provide visibility into rental trends, fleet usage, and customer engagement—all at an affordable cost.

Phase 1: Problem Understanding & Industry Analysis

Requirement Gathering (What to Track):

Bikes (Inventory Management):

- Bike ID / Serial Number
- Bike Type (Mountain, Road, Electric, Scooter, etc.)
- Availability Status (Available, Booked, Under Maintenance)
- Rental Rate (per hour/day/week)
- Maintenance Due Date

Customers (Renter Records):

- Customer Name & Contact Info
- ID Proof Details (License/ID Card)
- Rental History (previous bookings, payment status)

Bookings/Reservations:

- Booking ID
- Bike Selected
- Rental Duration (start & end date/time)
- Payment Status (Pending, Paid, Overdue)
- Linked Record (Customer Account/Contact)

Reporting & Dashboards:

- Active Rentals (current bookings)
- Bike Utilization Rate (available vs rented)
- Revenue by Bike Type or Time Period
- Overdue Returns & Payments

- Top Customers (frequent renters)

Automations (Workflow Rules/Flows):

- Auto-confirmation email/SMS after booking creation
- Reminder 24 hours before bike return deadline
- Notification for overdue returns/payments
- Auto-creation of maintenance tasks after certain rental cycles

Stakeholder Analysis

- **Customer (Bike Renter):** Needs a smooth booking process, timely confirmations, and return reminders.
- **Rental Staff (End Users):** Requires an easy interface to create/update bookings, check availability, and collect payments.
- **Manager/Owner:** Needs dashboards to track rentals, revenue, and overdue returns for better decision-making.
- **Admin:** Configures custom fields, sets up flows for automations, and manages fleet/booking data.

Business Process Mapping

1. **Booking Creation:** Rental staff/customer creates booking linked to a bike and a customer record.
2. **Availability Check:** System ensures bike is not double-booked.
3. **Confirmation & Payment:** Booking confirmation sent; payment marked (Pending/Paid).
4. **Rental Execution:** Bike handed over, status changed to "Rented."
5. **Return & Closure:** Upon return, staff updates status, records payment, and schedules maintenance if needed.
6. **Reporting & Insights:** Dashboards show revenue, fleet usage, overdue returns, and top-performing bikes/customers.

Industry-Specific Use Case Analysis

- **Local Bike Rental Shops:** Centralizes booking and customer management, reducing manual work.
- **Tour Operators:** Tracks group rentals, payment status, and customer engagement.
- **Corporate Rentals:** Supports companies offering employee bike rentals with usage reports and cost tracking.

AppExchange Exploration

Explore Salesforce AppExchange apps like:

- **Rental Management Solutions (3rd-party apps):** End-to-end rental lifecycle tools.
- **Field Service Lightning:** To track maintenance schedules and technician assignments.
- **Conga Composer:** For generating rental agreements and invoices.
- **Payment Gateway Integrations (Stripe, PayPal):** For online payments.

Why Simple & Affordable?

- **Low Complexity:** Uses standard Salesforce objects (Accounts, Contacts, Opportunities, Assets) with minimal customization.
- **Cost-Effective:** Built using Flows, Workflow Rules, and Reports/Dashboards, compatible with Salesforce Essentials or Lightning Professional editions.
- **Scalable for Small Businesses:** Designed for rental shops with 5–100 bikes and users, providing essential functionality without expensive add-ons.