

Phase 1: Problem Understanding & Industry Analysis (Online Laptop Ordering)

1. Requirement Gathering

Requirement gathering is the process of identifying **what the business needs** and **what users expect** from the system. For your project, this involved:

- **Objects & Data Points:**
You need to manage several types of data:
 - **Laptops:** Model, Brand, Price, Stock, Specifications
 - **Laptop Dealers:** Name, Contact, Location
 - **Laptop Customers:** Name, Email, Phone, Address
 - **Orders:** Order number, status, quantity, order date
 - **Testing / Service:** Test type, test date, service type, service date, status
- **Purpose:**
By knowing all these requirements upfront, you can design Salesforce **custom objects, fields, and relationships** to store and manage this data efficiently.
- **Methods to Gather Requirements:**
 - Interviews with stakeholders (admin, dealers, customers)
 - Analyzing business workflows
 - Reviewing industry standards for laptop sales

2. Stakeholder Analysis

This step identifies **who will use the system** and what their needs are:

- **Customers:**
 - Want to **place orders online**, track the **status of their orders**, and see the **status of testing/service**.
 - Salesforce use case: Expose a **customer portal** or integrate with **Experience Cloud**.
- **Dealers:**
 - Manage laptop **inventory**, receive orders, and fulfill them.
 - Salesforce use case: Assign **dealer role** and give access to **Dealer-specific Orders**.
- **Admin/Support:**
 - Oversee all processes, approve high-value orders, manage testing/service workflow.
 - Salesforce use case: Admin profile with full access, workflow automation for approvals, email alerts, and dashboards.

3. Business Process Mapping

This is about **visualizing the workflow** from start to finish. For your project:

- **Laptop Order Process:**
Customer → Laptop Order → Dealer → Laptop Testing → Laptop Service → Delivery
 - This helps you define **objects relationships** and **automation triggers** in Salesforce.
 - Example: When a new order is created, it triggers a **dealer notification** or **testing request**.
- **Service Process:**
Laptop Testing → Service Request → Completion Notification
 - Ensures **after-sales service tracking**.
 - You can use **Flows or Process Builder** to automate notifications and status updates.

4. Industry-specific Use Case Analysis

- Focus on **electronics/laptop sales** where:
 - Multiple dealers handle orders.
 - Customers expect quick order and service tracking.
 - After-sales service (testing, repair) is critical.
- Salesforce Application:
 - Multi-tier order handling: Customer → Dealer → Service Team
 - Automated notifications for service and order status updates
 - Role-based dashboards for dealers and admins

5. AppExchange Exploration

- AppExchange is Salesforce's **marketplace for pre-built solutions**.
- You reviewed:
 - Order management apps
 - Service management apps
 - Customer engagement tools
- Purpose:
 - Understand what **ready-made functionality** exists.

- Identify **gaps** that need **custom development**.

Summary of Phase 1

Phase 1 is essentially about **understanding the problem, users, and workflow before building anything** in Salesforce.

Key outcomes for your project:

1. Clear list of required objects and fields (Laptops, Dealers, Customers, Orders, Testing, Service Testing).
2. Defined stakeholders and their needs.
3. Documented business processes to guide automation, validation rules, and triggers.
4. Understanding of industry-specific requirements for multi-tier order processing.
5. Awareness of existing AppExchange solutions to potentially leverage or customize