

1. Project Phases

Phase 1: Architecture & Planning

Define objects, fields, relationships, formula fields.

Establish validation rules, flows, Apex triggers, batch jobs.

Design email templates for notifications and customer communication.

Phase 2: Development

Object and field creation.

Implement automation (flows, process builders, Apex triggers).

Set up data security and sharing rules.

Develop batch jobs for scheduled processing.

Configure email templates and notifications.

Phase 3: Testing & QA

Unit testing of objects and automation.

End-to-end testing with sample data.

Performance testing and security checks.

Phase 4: Deployment & Training

Deploy to production.

Train users on new functionality.

Post-go-live support and monitoring

Deliverable:

Solution Design Document including Object Model, ERD, and Automation Strategy.