Salon Management System

This document completes the initial discovery and planning phase. It includes an analysis of the key stakeholders, a mapping of business processes, and an exploration of potential AppExchange solutions.

1. Requirement Gathering

We need a complete view of every client to provide personalized service. We will use the standard Salesforce Contact object for this.

Client Information

Required Fields:

- First Name (Standard)

- Last Name (Standard)

- Mobile Phone (Standard) - For sending SMS reminders

- Email (Standard) - For sending email confirmations

- Mailing Address (Standard) - Optional, for marketing

- Client Notes (Custom Field) - A rich text field to store important preferences, allergy information, or color formulas

Service Information

We need a price book of all services the salon offers. We will use the standard Salesforce Product object for this, treating each service as a product.

Required Fields:

- Service Name (Standard Product Name) - e.g., "Men's Haircut", "Full Color", "Manicure"

- Service Description (Standard) - Details about the service

- Standard Price (Standard Price Book) - The cost of the service

- Duration (Minutes) (Custom Field) - A number field indicating how long the service takes (e.g., 30, 90). This is critical for scheduling

Staff Information

Each staff member needs a profile and a schedule. We will use the standard Salesforce User object.

Required Fields:

- Full Name (Standard)
- Email (Standard) - Their login
- User License (Standard) - Salesforce License
- Profile (Standard) - e.g., "Stylist Profile", "Receptionist Profile" to control permissions

Appointment Information

This is the most important custom object. It will connect the Client, the Service, and the Staff member for a specific time slot. We will create a new Custom Object called Appointment.

Required Fields:

- Appointment ID (Standard Auto-Number) - A unique ID for each appointment, e.g., APP-0001
- Client (Master-Detail Relationship to Contact) - Lookup to the client who booked
- Stylist (Lookup Relationship to User) - Lookup to the staff member assigned
- Service (Lookup Relationship to PricebookEntry/Product) - Lookup to the service being performed
- Appointment Date & Time (Date/Time Field) - The scheduled start time
- Status (Picklist Field) - Values: "Scheduled", "Confirmed", "In Progress", "Completed", "Cancelled", "No-Show"
- Final Price (Currency Field) - The final amount charged, which could be different from the standard price
- Appointment Notes (Text Area) - Notes specific to this visit

2. Stakeholder Analysis

A stakeholder is anyone who has an interest in the project's success. For the Glamour Salon, we have three primary stakeholders.

Stakeholder Role	Name (Example)	Their Primary Goal	What They Need from the System
Salon Owner	Ayush Dewan	Grow the business, increase profit, and ensure smooth operations	High-level dashboards, sales reports, and staff performance metrics
Receptionist	Sam Kumar	Manage the schedule efficiently, avoid booking errors, and handle client check-ins quickly	An easy-to-use calendar, quick access to client information, and a simple booking process
Stylist	Priya Singh	Provide excellent service and build client relationships	Access to their daily schedule and client-specific notes (preferences, formulas)

3. Business Process Mapping

This section outlines the salon's current manual processes ("As-Is") and how they will be improved with the new Salesforce system ("To-Be").

Process: Booking a New Appointment

As-Is (Current Manual Process)

1. Client calls the salon
2. Receptionist puts client on hold
3. Manually flips through the paper diary
4. Finds an empty slot and shouts to check if the stylist is free
5. Writes the client's name in pencil

Outcome: Slow, error-prone, no reminders.

To-Be (Future Salesforce Process)

1. Receptionist opens the Salesforce console
2. Searches for the client by name/phone
3. Views the dynamic calendar to see availability
4. Selects the client, service, stylist, and time slot on a single screen
5. Clicks "Save." An Appointment record is created

Outcome: Fast, accurate, and an automated SMS/email reminder can be sent.

Process: Viewing a Client's History

As-Is (Current Manual Process)

1. Stylist tries to remember the client's last visit
2. Asks the client, "What did we do last time?"
3. Relies on memory for color formulas or preferences

Outcome: Inconsistent service, risk of losing important details.

To-Be (Future Salesforce Process)

1. Stylist opens the Salesforce mobile app or views the appointment details
2. Clicks on the client's name
3. Instantly sees all past appointments, services, and notes under the client's Contact record

Outcome: Personalized, high-quality service every time.

4. Industry-Specific Use Case Analysis

This section analyzes unique processes for the beauty and wellness industry that our Salesforce system must handle.

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Complex Client Data

Industry Need: Unlike a standard retail customer, a salon client has technical data that is crucial for consistent service. This includes hair color formulas, allergy notes, and treatment preferences.

Salesforce Solution: We will create a custom rich-text field called Client Technical Notes on the Contact object. This allows stylists to record detailed, formatted notes (e.g., "Color Formula: 30g BrandX 5.1 + 30g 6% developer") that are permanently and securely stored on the client's record.

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Duration-Based Scheduling

Industry Need: Salon services are not all the same length. A simple one-hour calendar slot is not practical. A haircut might take 30 minutes, while a color treatment could take 3 hours.

Salesforce Solution: We will add a custom Duration (Minutes) field to our Product (Service) object. When an appointment is booked, our scheduling system will use this field to calculate the appointment's end time, ensuring the stylist's calendar is blocked for the correct amount of time and preventing double-bookings.

Use Case 3: Client Rebooking & Retention

Industry Need: The most profitable salon clients are returning clients. The period immediately after a service is the best time to secure the next booking.

Salesforce Solution: We will design a "Check-Out" Screen Flow. When a receptionist marks an appointment as "Completed," this flow will automatically pop up, displaying the client's details and a button that says "Book Next Appointment." It can even pre-calculate the date for 6 weeks in the future, making it incredibly easy for the receptionist to secure a follow-up visit.

Key Benefits Summary

Streamlined Operations

Transform manual paper-based processes into efficient digital workflows that save time and reduce errors in appointment booking and client management.

Enhanced Client Experience

Provide personalized service with instant access to client history, preferences, and technical notes, ensuring consistent quality every visit.

Business Growth

Increase client retention through automated rebooking processes and gain valuable insights through comprehensive reporting and analytics.