Project Planning Template

Title: Implementation Roadmap for Jewel Management System on Salesforce

Objective:

To provide a structured, time-bound plan for building and delivering a Salesforce-based solution for jewelry inventory and customer management. The plan outlines the project phases, tasks, estimated timelines, dependencies, and responsibilities.

Project Overview

Project Name	Jewel Management System
Platform	Salesforce Lightning Experience
Start Date	[Insert Date]
End Date	[Insert Date]
Team Members	[Admin Name], [Developer], [Tester]
Target Users	Jewelry Store Owner, Admin, Sales Staff

m Project Timeline

Phase	Duration	Key Activities
Ideation	1 day	Brainstorm features, empathy mapping, define problem statement
Requirement Analysis	1 day	Create customer journey map, data flow diagram, functional requirements
Design	1 day	Define solution architecture, page layout planning, dependency mapping
Setup and Configuration	2 days	Create custom objects, fields, and page layouts in Salesforce
Automation & Flow Design	1 day	Design record-triggered Flow for email notifications on billing

Testing Phase	1 day	Conduct functional and performance testing of forms, flows, and layouts
Reports & Dashboards	1 day	Build summary reports and visual dashboards for key stakeholders
Documentation & Final Report	1 day	Prepare user manual, final project report, and deployment guide

X Deliverables by Phase

Phase	Deliverables
Ideation	Brainstorming doc, Empathy Map, Problem Statement
Requirement Analysis	Data Flow Diagram, Customer Journey Map, Functional Specs
Design	Solution Architecture PDF, Page Layout Wireframes
Configuration	Working custom objects, field dependencies, layouts for Gold/Silver
Automation	Salesforce Flow for Billing-based email notification
Testing	Bug reports, test results summary
Reports/Dashboards	Gold vs Silver sales reports, top 5 customers, total billing summaries
Documentation	Final Report, Planning Template, Flow configuration guide

Task Allocation

Team Member	Responsibility
Project Admin	Object setup, security roles, layout configuration
Developer	Flow creation, automation, report/dashboard design
Tester	Manual testing, validation rule checks, report accuracy testing
Documentation	Final report preparation, diagrams, planning PDF formatting

Risk Management

Risk	Mitigation Strategy
Object dependency misconfiguration	Review all relationships before data entry
Flow triggers wrong data or emails	Use test records and debug logs before deployment
Page layout clutter	Keep separate layouts for Gold/Silver, show only required fields
Missing data in reports	Validate fields and records before reporting

Success Criteria

- All objects function as expected with correct relationships
- User can create records for Jewel Customer, Item, Order, and Billing
- Flow sends email when Billing is created
- Dashboard correctly visualizes data insights
- User manual is clear enough for a non-technical user to operate the system