Project Planning Phase

Project planning (Scope, Module Planning,Risk Management and Mitigation , Milestone and Deliverable Plan)

Project Planning Phase

Team ID   : NM2025TMID05586

Project Title   : Garage Management System

Date   : 01 November 2025

2.1 Purpose of the Phase

The Project Planning Phase establishes a clear roadmap for the implementation of the Garage Management System using Salesforce. This phase defines objectives, project scope, timeline, resources, and risk management strategies to ensure systematic execution of the project.

2.2 Scope of the Project

The Garage Management System automates daily garage operations by using Salesforce capabilities. It covers customer management, vehicle tracking, appointment scheduling, service tracking, billing automation, and reporting. This system is designed to minimize manual effort, reduce delays, and enhance customer satisfaction through real-time data management.

2.3 Objectives

1. Develop a centralized Salesforce-based platform for managing garage operations.
2. Implement automated workflows to reduce manual processes.
3. Integrate appointment, billing, and feedback modules.
4. Generate real-time performance and financial reports.
5. Improve customer communication using email and alert automation.

2.4 Module Planning

Module	Description
Customer Management	Maintain customer information, contact details, and service history using custom objects.
Vehicle & Service Management	Track vehicle details and service progress through linked records.
Appointment Scheduling	Provide an interface for scheduling and

	managing customer appointments.
Billing & Invoicing	Generate automated invoices and record payment details after each service.
Reports & Feedback	Create reports and dashboards for insights and collect post-service feedback.

2.5 Tools and Salesforce Components

The following Salesforce tools and components are used for the project:
1. Salesforce Sales Cloud and Service Cloud.
2. Custom Objects: Customer, Vehicle, Service, Appointment, Invoice, Feedback.
3. Process Automation: Flows, Workflow Rules, and Approval Processes.
4. Reports and Dashboards for analytics and performance monitoring.
5. Lightning App Builder for user interface customization.

2.6 Project Timeline and Milestones

Milestone	Expected Completion
Ideation and Requirement Gathering	Week 1
Design and Planning	Week 2
Development and Configuration	Weeks 3–4
Testing and User Acceptance	Week 5
Deployment and Final Review	Week 6

2.7 Roles and Responsibilities

Role	Responsibilities
Project Manager	Oversees project execution, milestones, and communication between team members.
Salesforce Developer	Creates and configures Salesforce objects, Flows, and reports.
QA Engineer	Tests system functionality and ensures quality assurance.
UI/UX Designer	Designs user-friendly Lightning pages and dashboards.

Documentation Lead	Prepares technical and phase-wise documentation.

2.8 Risk Management and Mitigation

1. Data inconsistency: Mitigated using validation rules and field-level security.
2. User adoption issues: Addressed through training sessions and guidance materials.
3. Workflow errors: Resolved by pre-deployment testing in Salesforce sandbox.
4. Timeline delays: Controlled through Agile sprints and weekly status reviews.

2.9 Expected Outcome

At the end of the Project Planning Phase, a complete roadmap for implementation is developed, defining project scope, deliverables, responsibilities, and timelines. This plan ensures a structured and efficient approach to implementing the Garage Management System in Salesforce.