Ideation phase

Brainstorming/idea Prioritization

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 defines the overall roadmap, milestones, and resources required to execute the Garage Management System on Salesforce. This phase establishes the technical strategy, identifies dependencies, and ensures the project aligns with Salesforce best practices for scalability, automation, and user experience.

2.2 Scope of the Project

The Garage Management System aims to automate and optimize the daily operations of vehicle service centers using Salesforce Cloud. The scope includes Customer Management, Vehicle and Service Tracking, Appointment Scheduling, Billing Automation, Reporting, and Feedback collection. Out-of-scope elements include integration with external payment gateways and mobile application development, which may be considered in future phases.

2.3 Objectives

- Implement a centralized database using Salesforce custom objects.
- Automate service workflows to minimize manual effort.
- Enable appointment scheduling and billing via Salesforce Flows.
- Generate real-time dashboards and analytics for performance tracking.
- Improve communication through automated notifications and email alerts.

2.4 Module Planning

- Customer Management: Creation of a 'Customer' object with fields for contact details, communication preferences, and service history. Relationships established with vehicles and appointments.

- Vehicle & Service Tracking:Implementation of 'Vehicle' and 'Service' objects to track vehicle details, service type, assigned technician, and job status. Workflow rules to update status in real-time.

- Appointment & Billing Automation: Automated Flow to manage booking, rescheduling, and invoice generation upon service completion. Integration with Salesforce approval processes for validation.

- Reports & Feedback: Custom reports and dashboards for analyzing performance metrics, revenue trends, and feedback insights. Use of Salesforce Experience Cloud for customer surveys.

2.5 Tools & Salesforce Components

- Salesforce Sales Cloud and Service Cloud
- Custom Objects: Customer, Vehicle, Service, Appointment, Invoice, Feedback
- Process Automation: Flows, Workflow Rules, and Approval Processes
- Reports and Dashboards for analytics
- Lightning App Builder for UI customization
- Validation Rules for data accuracy

2.6 Project Timeline & Milestones

The project will be executed over five major milestones:
1. Ideation and Requirement Gathering – Week 1
2. Design and Planning – Week 2
3. Development and Configuration – Week 3 to Week 4
4. Testing and UAT – Week 5
5. Deployment and Review – Week 6

2.7 Roles & Responsibilities

- Project Manager: Oversees project execution and milestone tracking.
- Salesforce Developer: Configures objects, Flows, and reports.
- QA Engineer: Conducts testing for workflows, permissions, and automation.
- UI/UX Designer: Designs intuitive Lightning pages and interfaces.
- Documentation Lead: Prepares technical documentation and final reports.

2.8 Risk Management & Mitigation

- Data Inconsistency: Mitigate using validation rules and field-level security.
- User Adoption Issues: Provide training sessions and user manuals.
- Workflow Errors: Conduct pre-deployment sandbox testing.
- Timeline Delays: Use Agile sprint planning with weekly stand-ups.

2.9 Expected Outcome

At the end of the Project Planning Phase, the team will have a comprehensive implementation roadmap including defined Salesforce modules, timelines, assigned roles, and technical configurations. This will ensure a structured and successful execution of the Garage Management System in subsequent phases.