

Agile Planning Logic

Epic 1: Salesforce Data Model Setup

Goal: Set up custom objects, fields, and relationships in Salesforce

Sprint 1 (5 Days)

User Story	Story Points
Create custom objects: Jewel Customer, Item, Price, Customer Order, Billing	3
Add fields (Text, Phone, Email, Currency, Formula etc.) to all objects	3
Create relationships (Lookup, Master-Detail) among objects	2
Create custom tabs for each object	1

Epic 2: UX & Record Types

Sprint 2 (5 Days)

User Story	Story Points
Create Page Layouts for Gold and Silver Items	2
Create Record Types for Gold and Silver	2
Set up permission sets and profiles (Gold Smith, Worker)	3
Assign Record Type Access in Permission Sets	1
Create roles and users (Niklaus, Kol, etc.)	2

Epic 3: Backend Logic (Apex)

Sprint 3 (5 Days)

User Story	Story Points
Create Apex Trigger Handler class for Billing	3
Write Trigger to update Paid Amount	2
Create Validation Rules for Jewel Customer and Item	3
Set up Field Dependencies for Priority → Return Days	2

Epic 4: Reports, Dashboard & Flow Automation

Sprint 4 (5 Days)

User Story	Story Points
Create reports: "Item with Billings", "Billings with Item + Order"	3
Design 2 dashboards with visuals (Total Revenue, Item Type Split)	3
Create Record-Triggered Flow to send item details via email	4
Add dynamic text templates and rich content to Flow	2

Summary

Sprint	Story Points	Goal
Sprint 1	9	Core Object and Data Model
Sprint 2	10	UX (Layouts, Record Types) + Security
Sprint 3	10	Backend Logic (Triggers, Validations)

Sprint 4

12

Reporting + Flow
Automation

Velocity Calculation:

Total Story Points: 41

Number of Sprints: 4

Velocity = $41 / 4 = 10.25$ Story Points per Sprint