

Phase 3: Project Design Phase

Validation & Planning

| Field | Details |
|---------------|------------------------------|
| Date | 9 November 2025 |
| Team ID | NM2025TMID02588 |
| Project Name | Medical Inventory Management |
| Maximum Marks | 4 Marks |

Validation & Planning

This step involves formalizing the design and setting the stage for the Build phase.

- **Gap Analysis & Customization Decision:** A formal review comparing the business requirements against the proposed technical design. Any remaining gaps are identified, and a final decision is made on whether to use custom development or accept a process change.
- **System Landscape Definition:** Specifying the number and purpose of Salesforce sandboxes (Dev, UAT, Staging) required for the project's Build and Testing phases.
- **Data Migration Plan (High-Level):** Defining the strategy for migrating legacy inventory data (product masters, current stock levels, historical usage) into the new Salesforce objects. This includes data cleansing requirements and identifying the migration tools.
- **Technical Design Review & Sign-off:** The complete design document is formally reviewed by the executive sponsor, IT leadership, and compliance officers. Sign-off is mandatory to lock the design and prevent scope creep during the Build phase.

Design Phase

- **Solution Design Document (SDD):** The master document containing the full technical and functional blueprint.
- **Future State Process Flow Diagrams:** Visual representation of all new inventory workflows (BPMN format preferred).
- **Data Model Diagram (ERD):** Detailed layout of all Custom and Standard Objects, fields, and relationships.

- **Integration Specification:** Detailed mapping of data fields between Salesforce and all integrated systems (e.g., ERP).
- **Security Matrix:** A table mapping User Roles/Profiles to specific data access levels (e.g., Read/Edit/Delete on the Product Item object).
- **Customization/Configuration Log:** A list detailing all planned custom development (Apex, LWC) vs. declarative configuration (Flows, Custom Fields).
- **Data Migration Plan:** Step-by-step approach for extracting, transforming, and loading (ETL) legacy data.