**Design Template**

|  |
| --- |
| [Midweekvermin] |
| Software Project Template |
| [SalesForce implementation] |
| Steven Hickman  6-1-2024 |

Contents

[A. Introduction 3](#_gjdgxs)

[A1. Introduction and Purpose Statement 3](#_30j0zll)

[A2. Overview of the Problems 3](#_1fob9te)

[A3. Goals and Objectives 3](#_3znysh7)

[A4. Prerequisites 3](#_2et92p0)

[A5. Scope 3](#_tyjcwt)

[A6. Environment 3](#_3dy6vkm)

[B. Requirements 4](#_1t3h5sf)

[Business Requirements 4](#_4d34og8)

[User Requirements 4](#_2s8eyo1)

[Functional Requirements 4](#_17dp8vu)

[Non-Functional Requirements 4](#_3rdcrjn)

[C. Software Development Methodology 4](#_26in1rg)

[C1. Advantages and Disadvantages 4](#_lnxbz9)

[Advantages of the Agile Method 4](#_35nkun2)

[Disadvantages of the Agile Method 4](#_1ksv4uv)

[Advantages of {A Different Method} 4](#_44sinio)

[Disadvantages of {A Different Method} 4](#_2jxsxqh)

[C2. Best suited 5](#_z337ya)

[D. Create Two Representations of the Software Solution 5](#_3j2qqm3)

[Representation 1 5](#_1y810tw)

[Representation 2 5](#_4i7ojhp)

[E. Testing 6](#_2xcytpi)

[Test Name 1 6](#_1ci93xb)

[Test Name 2 7](#_3whwml4)

[Test Name 3 8](#_2bn6wsx)

[F. Sources 8](#_qsh70q)

# Introduction

# A1. Introduction and Purpose Statement

SalesForce is a highly sophisticated Customer Relationship Management (CRM) platform that is used in a variety of different business models. Its purpose is to make customer relationship management, marketing, sales tracking, and a variety of other business aspects effortless so that as a company, MJ Logistics can focus on what matters. The intent of this document is to define what it means for MJ Logistics to implement SalesForce.

# A2. Overview of the Problems

The system that MJ Logistics uses currently is disconnected and fragile. Threading multiple tools together creates a variety of problems such as unconsolidated reports, faulty security, inhibited scalability, and can make for a confusing licensing structure. SalesForce will solve this by replacing all the tools with a single system. SalesForce comes equipped with everything the business needs to satisfy its current operational requirements and more to cover additional concerns as the business grows. This means less hoops to jump through for licensing, zero exceptions made with concerns to security, customizable reports, and a scalable system both in the cloud or the companies growing infrastructure.

# A3. Goals and Objectives

With the implementation of SalesForce, we aim to consolidate the system into one well-oiled CRM that covers all aspects of the business and not only streamlines the business processes, but provides a more secure environment for the business and its clientele to operate in.

Objectives:

* Replace current tools used for business, user, functional, and non-functional requirements with tools inside of SalesForce.
* Dismantle and replace the confusing portfolio of related and unrelated tools with a singular well connected system.
* Allow for cloud scalability growing business concerns.
* Establish confidence in MJ Logistics security by removing exceptions needed for the integration of disconnected tools.

# A4. Prerequisites

There are several prerequisites for the implementation of SalesForce. While they are not strict requirements for use, they are the recommended prerequisites for a company of MJ Logistics caliber to operate at a level that the customers have come to expect.

|  |  |  |  |
| --- | --- | --- | --- |
| Number | Prerequisite | Description | Completion Date |
| 1 | Latency | A network latency of 150ms or less is recommended | 7/1/2024 |
| 2 | Download speed | Each connected device must have an individual download speed of 3 Mbps regardless of shared broadband. | 7/1/2024 |
| 3 | RAM | 8GB of RAM is recommended with at least 3GB free for SalesForce | 7/31/2024 |
| 4 | Octane | Test your system with SalesForce Octane and achieve a score of 30,000 or greater | 8/1/2024 |

# A5. Scope

Scope: SalesForce will integrate the business, user, functional and nonfunctional requirements by consolidating costumer and business information interactions, enhancing security, integrating data, replacing the existing system, and allowing for future growth with flexible build and integration options. Additionally, data is stored in the United States with native data management and storage capabilities. SalesForce provides a ticketing system both internal and customer facing for problem resolution and provides scalability through the cloud. Initial training on the new system will be provided. Continuous support and maintenance of SalesForce along with updates and bug fixes will be provided. Comprehensive documentation about the system and its implementation and integration with MJ Logistics will be made readily available.

**Out of Scope**: SalesForce will not provide an updated business model, it’s up to MJ Logistics to develop a business model suitable for the new system and processes. Additional training will be MJ Logistics’ responsibility to set up or provide for new or existing staff.

# A6. Environment

SalesForce provides cross browser and cross platform support for a multitude of devices. JavaScript must be supported and enabled. This will provide a fluid and customizable front-end experience. Additionally, regarding the front-end experience SalesForce comes with the ability to customize your view. This means that you can choose what components you use from SalesForce, each team member role can come equipped with various tools they need to complete their jobs without culturing their workspace with anything unnecessary. Each Salesforce window and tab can pop out and be displayed alongside another tab for improved agility when the need to switch quickly between workspaces arises. Furthermore, with native data management solutions, the backend environment is set up to provide easy data integration, updates, and management. With both cloud and internal infrastructure options, scalability concerns are a thing of the past. With SalesForce data manager you can keep a close eye one your data, allowing you to monitor open jobs and orders, manage your assets, and usage all in one place. If necessary, SalesForce allows for the integration of AI into your data governance plan to assist with research.

* Per the user requirements Salesforce will be deployable on all the latest Chrome, Firefox, edge, and safari browsers.
* Salesforce comes with mobile support including tablets for the latest IOS and android devices.
* Salesforce supports both windows and apple operating systems.
* For data management Salesforce offers cloud-based storage with a cloud relational database but can be deployed on the current infrastructure as well. Salesforce requires use of a relational database.

In summary what is needed to deploy SalesForce is a modern browser, a modern non-linux operating system, a relational database, and to choose between either using the current infrastructure of the company or moving to a more cloud or hybrid based solution.

# Requirements

## Business Requirements

SalesForce is the best option for the reporting needs of MJ Logistics. SalesForce provides customizable screens and dashboards that can be changed and implemented based on a user’s role in the company and adapted to provide comprehensive reports. Each dashboard can be set up with tables that section off data allowing you to click through, minimize and reorganize displayed data based on current needs. It allows for saving reports and notes for future access in a comprehensive backlog.

## User Requirements

SalesForce is available on a variety of operating systems and browsers. SalesForce is maintained and updated to work on all the latest systems in which JavaScript is supported.

## Functional Requirements

A comprehensive and customizable ticketing system is provided and is available for integration with various other SalesForce systems so that each user role can have a ticketing system based on their specific needs and roles in the company. You can set up the ticketing system in various ways. For example: having users provide information including who the ticket is for, the reason, follow up, and relevant details. Furthermore, SalesForce provides a more automated system with a succinct list of drop-down items and automatically collects the date and time of the request as well as automating email replies and an audit trail.

## Non-Functional Requirements

SalesForce can be hosted on either a cloud-based environment or internal infrastructure and supports a hybrid hosting environment. SalesForce does not force upgrades, is fully integrated and offers comprehensive SLA’s, licenses, and outage support.

# Software Development Methodology

When implementing the changes the Agile methodology has 3 advantages in comparison to the waterfall methodology.

1. Iterative development and implementation.

1. Emphasis on working software.
2. Quick and efficient response to change.

It also has 3 disadvantages:

1. Lack of comprehensive documentation

1. Agile does not work will with a large, detailed plan
2. Software or system will not be completely implemented at the same time.

The waterfall methodology has 3 distinct advantages.

1. A detailed implementation plan
2. Everyone knows what their jobs are and can come in everyday and go straight to work
3. Little danger of cost getting out of hand and over budget

With it's more distinct disadvantages

1. Slow change response
2. Potential to exacerbate issues
3. Potential lack of communication

The implementation of SalesForce would benefit the most from the Agile methodology. This is because of the size of the project and the presence of the current system. With the system that is currently implemented being a collection of various tools working together this helps with iterative implementation in that the tools should be able to stand alone and possibly work alongside SalesForce as we work to implement a better system and system design. Meaning that we can implement the system bit by bit without disrupting business operations. With Agile’s emphasis on working software we can ensure that when implemented the software will work. Unfortunately, most of the attention will be focused on getting it to work and not on documenting how it all went together so there may be limited documentation. SalesForce does provide comprehensive documentation for the product itself and through diligence we should be able to create a record of how the system was implemented and the steps that were taken. While not comprehensive it should be enough to recreate the process if necessary. When implementing a new system where there were several different tools previously used, it is important that we can react to changes in the system, data, and the system’s behavior. Working in small pieces allows us to respond if the database suddenly stops working when we decommission a seemingly unrelated tool or other piece of software. It allows for quick isolation and response to problems that may arise. In an undertaking like this, the plan may be subject to change and need modification. Having a large, detailed plan, using a waterfall methodology would not work well when working with an Agile system that is knit together. Using the waterfall methodology in this situation would result in an unreasonable amount of downtime as an attempt was made to follow a rigid plan and implement new systems and tools. If done improperly it would look like a one-to-one swap attempt and would take the entire system offline for a time as Salesforce was implemented in its entirety. With waterfall there is very little room to adjust the plan for changes. For instance, with the growing needs of MJ logistics if it becomes apparent that a cloud option is needed for data storage in a waterfall plan implementing that change is an extensive process that requires adjustments made to the whole plan and its time frame. With agile implementing changes like this is much easier and allows the team to quickly react to the needs of the business.

# Create Two Representations of the Software Solution

## Representation 1

A diagram with text and a green box

Description automatically generated with medium confidence

This is a navigation workflow representation of someone on MJ logistics sales team. It shows the main screens that the team-member will interact with and the navigation options form log in.

## Representation 2

A diagram of a document

Description automatically generated with medium confidence

This represents the cases in SalesForce which act as the ticketing system. It shows the work flow of a resolutions team member opening, working on, and escalating tickets. It also shows how the worker will add tickets to their own open ticket queue or removed them from the teams work queue.

# SALEs LOGGING TEST

|  |
| --- |
| **Requirement to be tested:** Sales tracking |
| **Preconditions:** Opportunity interface must be implemented. |
| **Steps:**   1. Open system 2. Sign on as sales member 3. Navigate to customer account 4. Click create new opportunity 5. Select opportunity type 6. Select product type 7. Select type of sale (cold call, etc.) 8. Select whether customer made a purchase 9. Click save opportunity |
| **Expected results:** The results will save a tag to the account in an opportunity section, update a log containing all the opportunities, and update a comprehensive log file showing more detailed information about the opportunity. |
| **Pass:** There are a few things that will need to occur for the test to be considered a pass.   1. The log of who has submitted opportunities must be updated so that supervisors can keep track of sales for their team and payroll can track and appropriately assign commissions. 2. The tag must appear on the account so that should the customer call back in the call can be transferred to the appropriate team member that they were working with because they have preexisting knowledge of the account and the customers’ needs. 3. Finally, there needs to be a more comprehensive log file that is updated to contain more detailed information about the opportunity and what product was sold.   **Fail:** Each condition listed for passing is important to the overall success of the sales tracking system and to ensure sales representatives get paid. Any of the individual pass conditions failing will result in an overall failure for the entire test. |

# Case implementation test

|  |
| --- |
| **Requirement to be tested:** Ticketing System |
| **Preconditions:** CRM for business reporting and customer tracking must have been implemented and cases must have been added to the GUI interface. |
| **Steps:**   1. Open system 2. Open Reporting 3. Find the cases GUI interface inside of Reporting 4. Click on the button labeled new inside of the cases GUI 5. Select the kind of case being created from the first drop down in the new pop up window 6. Select a sub reason from the second drop down 7. (Optional) fill in text field with detailed description of why the ticket is being put in 8. (Optional) enter client name or other identifying information into the search field to specify who the ticket is in relation to if it is regarding a client. 9. Click submit at the bottom of the pop-up window. |
| **Expected results:** The ticket will be sent into the work queue assigned to the resolutions team best fitting the category selected in the ticket. There it can be viewed, worked on, and eventually resolved, after which it will prompt an email notifying the appropriate team members that their request has been completed so that they can go and view the results and any comments left by the resolutions teammate. |
| **Pass:** To meet the passing requirements the feature must do the following.   1. Save the ticket for later viewing    1. The ticket and the information inside of the ticket should be saved to a log or file so that it can be viewed by related parties. 2. The ticket should be placed in a work queue for the correct team to view and assign it. 3. The ticket should be updated up to 4 times: pending, assigned, in progress, and complete. 4. Upon completion an automated email should be sent out to all related parties notifying them of the ticket’s completion so that they can view it. 5. Ticket should be removed from the work queue after it is labeled complete. |

# Platform support test

|  |
| --- |
| **Requirement to be tested**: User performance requirement: OS and browser support |
| **Preconditions:** One or more SalesForce systems must be implemented. |
| **Steps:**   1. Open desired browser or app on target system 2. Navigate to the SalesForce system if not already there 3. Log in to the system (single sign-on may have already logged you in) 4. Ensure that the system loads properly and does not contain any missing sections on the landing page 5. Navigate to each implemented system and ensure that all sections are present 6. Ensure the system functions on target browser or system. 7. Repeat steps with new browser or OS. |
| **Expected results:** System should function correctly and not have any missing or unloaded parts on every browser and OS that company uses. System will have full functionality on:   * latest Chrome and Chromium * latest Firefox * latest Microsoft Edge * latest Safari * mobile and tablet devices’ application support systems * latest iOS systems * latest Microsoft operating system * latest Android systems |
| **Pass: To pass this test implemented SalesForce systems should maintain functionality across listed browsers and OS’s. All components, sections, and custom fields should appear and display all intended content.**  A fail condition will occur if SalesForce fails to maintain functionality or has omitted or missing information due to incompatibility. |

# Sources

*What are user interface settings in SalesForce? [? video included] - blog*. saasguru. (2024, May 24). https://www.saasguru.co/user-interface-settings-in-SalesForce/

Silverstein, S. (2020, July 29). *UX/UI design for SalesForce lightning apps*. Medium. https://uxdesign.cc/designing-for-SalesForce-lightning-apps-2cc88084f10c