Requirement Document – Cyclone Solutions

**Problem Statement :**

Cyclone Solutions are world’s leading event management organisation. With the increasing needs of customers and to balance the employee satisfaction, the business has decided to automate some of the exisitng processes which are performed manually by there executives using Salesforce.

**Traditional Widget Management Process**

The Widget Executives at Cyclone Solutions are responsible to record the new widgets that were added to the inventory. These widget values are required to be verified, such as validate if the brackets are balanced.

For ex: Fruites({apple},{banana},{mango})

This is a valid value that is added to the widget list.

Consider another scenario : Fruites(apple},mango}

This is not a valid widget value and hence, needs to be corrected and added to the list.

This validation is a manual process and is time consuming as the executive has to validate every single nesting, now if the values are too long, it is very prone to human errors. This could lead to failure in data processing and hence, business loss.

**User Personas :**

|  |  |  |
| --- | --- | --- |
| **S.No** | **User** | **Role** |
| 1 | System Administrator | System Admin is the super user who is responsible to perform the adminsitrative tasks such as adding new users, data load etc. |
| 2 | Widget Master | Widget Master is the super user who can manage all the widget records created by all the users. |
| 3 | Widget Executive | Widget Executive is the user who is responsible for creating new widgets and validating the values. |

**Solution Approach :**

1. Create a UI component in Salesforce which will be used by the Widget Executives and the Widget Masters to create new Widget records.
2. This UI component will be able to validate the values entered by the user and display appropriate messages as per the results.
3. Schedule a hourly batch class to automate the validation of new widget records and mark them as valid or invalid.
4. To notify the Widget Executives and Widget Masters, an email will be sent which will contain list of invalid widget records, so that the users can visit the records and enter a valid value.

**Considerations :**

1. The Widget Masters can save the invalid records as well and proceed with these records later.
2. For Widget Executives, it is mandatory to save the valid widget Records.
3. The Widget Masters and Executives can edit their respective records, once they have created it.

**Enhancements :**

Once the basic process is implemented, following items can be taken into consideration for future enhancements of the process –

1. Approval Process to approve the widget records by their respective managers and then lock the record to avoid any future data manipulation.
2. Salesforce 1 mobile app setup, in order to ease the process for the executives, in case they need to create records from the work sites.
3. Analytics to track the records (invalid/valid) per user.