**Design Template**

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| [CLG Consulting Firm LLC] |
| Software Project Template |
| Business Vision Document/Business Requirements |

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| [Claudia Grimaldi]  3-10-2024  [Version 1.0] |

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# Introduction

# A1. Introduction and Purpose Statement

CLG Consulting Firm is proposing the web-based CRM, Salesforce, for MJ Logistics Gaming Company. MJ Logistics Gaming Company has chosen to substitute their existing non-uniform and tedious approach for tracking customer data with a more standardized solution. This transition aims to improve scalability and reliability while offering simplicity for users. Salesforce CRM will provide aid in this by offering effortless integration with other systems ensuring a cohesive platform for overseeing client contacts, tracking sales, managing activities, and generating reports. The objectives of this CRM solution include creating a cohesive platform for centralizing contact and business data, documenting the company's engagements with contacts, regulating access based on roles and permissions, monitoring sales, facilitating data sharing through integration with other systems, ensuring strong security measures, and supporting future enhancements and expansion.Top of Form

# A2. Overview of the Problems

MJ Logistics has experienced significant growth in recent years. Challenges have arisen in effectively handling client contracts, tracking sales, managing activities, and generating reports. Salesforce CRM offers a comprehensive solution that exceeds platforms, addressing these needs and beyond. Salesforce guarantees seamless integration and scalability, ensuring ease of use and continued growth without jeopardizing customer satisfaction or sales performance.

# A3. Goals and Objectives

Scalability

Efficiency

Integration

Security

Robust Task and Activity Tracking

The system's primary goal is to achieve scalability, aiming to support up to 500 concurrent users. Additionally, it emphasizes efficiency through the consolidation and organization of critical contact and business activity data into a centralized repository, streamlining operations. Integration is also a priority, enabling seamless connectivity with different systems like Excel and Outlook. Furthermore, the system places a strong emphasis on security measures, controlling internal user access to specific functions based on roles to ensure comprehensive data protection. Lastly, it underscores robust task and activity tracking capabilities to improve productivity and performance monitoring within the system.

# A4. Prerequisites

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| Number | Prerequisite | Description | Completion Date |
| 1. | Collect hardware and software Information | Collect information from MJ Logistics regarding the current hardware and OS they are using to make sure the hardware and software will have the ability to run Salesforce and run them by the customer so they are aware of who and will not have the ability to access Salesforce after the CRM system is fully implemented. | 4/29/2024 |
| 2. | Collect user information | Collect information regarding how knowledgeable the end users are to Salesforce and offer any training materials available. | 5/3/2024 |
| 3. | Train users | Provide users with a presentation or webinar on Salesforce. | 5/10/2024 |
| 4. | Risk Assessment | Identify and assess potential risks that could impact its success. | 5/25/2025 |
| 5. | Budget Approval | Secure budget approval from MJ Logistics Gaming. | 6/12/2024 |

# A5. Scope

***Will cover:***

* System Scalability for growth of end users.
* Integration with other systems that end users requires.
* Efficiency.
* Security features and following guidelines.
* Sales Tracking and Activity Management.
* Configuring the ticketing system for an automation process.

***Not cover:***

* Assistance with selection of hardware to be purchased if users need to upgrade due to meeting the minimum requirements to run salesforce to the performance standard.
* Unexpected tasks or expenses.
* Provide technical assistance regarding your ISP.

# A6. Environment

**Front end:**

* 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

**Back end:**

Salesforce does not publicly disclose detailed information about its hosting infrastructure due to security and proprietary concerns. Please note: Salesforce incorporates Amazon Web Services (AWS) as part of its cloud infrastructure. Although Salesforce mainly depends on its own cloud resources, it employs AWS for specific services and resources, taking advantage of AWS's scalability, reliability, and worldwide presence.

**Service Level Agreements (SLAs):**

* Connectivity outages: This is handled by your ISP, which is out of scope of this, but we can provide some recommendations. Salesforce assures customers of a certain level of time during which its services are accessible, usually expressed as a percentage of the total time available over a specific period (e.g., 99.9% uptime). This assurance guarantees reliable access to Salesforce services for customers.
* Operational Efficiency: Salesforce is committed to upholding satisfactory levels of operational effectiveness in its services, ensuring prompt responses for data retrieval and transaction handling. The standards for operational efficiency may differ based on the function or feature being utilized.
* Data Security and Privacy: Salesforce is dedicated to preserving the privacy and integrity of customer data in accordance with industry norms and regulatory requirements. This involves implementing safeguards such as data encryption, access control, and regular security assessments.
* Service Remediation: In the event of Salesforce failing to meet its service level agreement commitments, customers may be eligible for service credits or compensation. These credits are usually allocated to future billing periods to mitigate any inconvenience resulting from service interruptions.
* Enhancement/feature requests: Salesforce outlines the period during which it will acknowledge enhancement requests from customers, ensuring prompt acknowledgment and communication of customer requirements.
* Refusal of upgrades: You have the option to decline Salesforce upgrades. Salesforce usually notifies customers in advance about upcoming upgrades and offers the choice to opt out or postpone the upgrade if necessary. This enables customers to evaluate how the upgrade might affect their current setups, integrations, and customizations, and decide on whether to accept or decline the upgrade according to their unique business needs and preferences. It's essential to recognize that declining upgrades could result in not benefiting from new features, improvements, and security updates offered by Salesforce.
* Maintenance: Salesforce sets a defined period during which it commits to addressing maintenance requests or inquiries from customers. This ensures prompt acknowledgment and effective communication of customer concerns. Salesforce pledges to address maintenance issues within a predetermined duration, guaranteeing swift resolution of customer concerns and reducing service interruptions to a minimum.

# Requirements

## Business Requirements

**Reporting** - Salesforce's CRM platform provides an extensive reporting solution that caters to a wide range of reporting needs. Users can create both standard and customized reports using an intuitive interface, allowing for easy data filtering, formatting, querying, and exporting. The platform supports detailed analytics and high-level reporting, including interactive dashboards and executive summaries, facilitating valuable insights into data trends. With robust access controls, data security and confidentiality are ensured, while features such as saved reports and reusable filters streamline reporting processes. Salesforce maintains historical data records, allowing users to analyze past activities and data.

## User Requirements

**OS and Browser Support** – Salesforce supports all the latest operating systems including Windows, MacOS, iOS (for mobile devices such as iPhones and iPads), Android (for mobile devices such as smartphones and tablets), and Various distributions of Linux. These operating systems support accessing Salesforce via web browsers or utilizing Salesforce mobile applications. The web browsers supported are latest Chrome and Chromium, latest Firefox, latest Microsoft Edge, and latest Safari.

## Functional Requirements

**Ticketing System** - Salesforce offers a ticketing system as part of its CRM platform, allowing organizations to efficiently manage and track all communications and inquiries for contacts. With Salesforce's ticketing system, users can log every interaction, including details such as who began the communication, the reason, date and time, and any follow-up actions taken. Each ticket is unique, ensuring that all issues are properly documented and addressed. Additionally, Salesforce's ticketing system can integrate with email systems to capture and log email replies, providing a comprehensive view of customer interactions. The system also maintains an audit trail, ensuring transparency and accountability in the workflow process.

## Non-Functional Requirements

**Forecasting** - Salesforce will address forecasting by providing a comprehensive solution that meets various requirements. Firstly, it accommodates currency adjustments, particularly for foreign currencies, ensuring accurate financial projections in different markets. Secondly, Salesforce offers baselining functionality, allowing users to capture a snapshot of forecasts and compare them with previous or alternative projections for better analysis and decision-making. Thirdly, managers can adjust within the system to refine forecasts based on their insights or market conditions. Additionally, Salesforce incorporates machine forecasting capabilities, leveraging AI and data analytics to generate predictive insights automatically. It also facilitates sales distribution across different regions or channels, enabling organizations to allocate resources effectively. Moreover, Salesforce supports various forecast periods and product forecasting, allowing businesses to forecast sales performance over specific time frames and for different product lines.

# Software Development Methodology

# C1. Advantages and Disadvantages

## Advantages of the Agile Method

* **Versatility and Adjustability**: A primary benefit of the Agile approach lies in its capacity to flexibly accommodate and address changes. This empowers MJ Logistics’ current expansion to tailor Salesforce to its requirements, reversing the conventional process.
* **Risk Mitigation:** Agile methodology minimizes the likeliness of project failure by dividing tasks into smaller, manageable parts and delivering tangible results at regular intervals. This approach enables teams to promptly detect and tackle issues and uncertainties before they escalate, thereby mitigating potential risks associated with project execution.
* **Enhanced Stakeholder Engagement and Visibility:** Agile approaches prioritize frequent interaction and openness between development teams and stakeholders, ensuring active involvement of MJ Logistics partners throughout the integration journey.

## Disadvantages of the Agile Method

* **Resource Demanding:** Agile requires consistent engagement from all stakeholders during the project's entirety, necessitating substantial time and dedication from team members.
* **Lacking Predictability:** Agile tasks often operate in brief iterations or sprints, concentrating on delivering minor product enhancements at frequent intervals. This may pose difficulties in furnishing precise forecasts or assurances regarding project schedules and outcomes.
* **Scope Creep:** In Agile projects, there's a risk of scope creep occurring, characterized by the gradual expansion of the project's scope beyond its initial planning or agreement.

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## Advantages of Waterfall Method

* **Consistency:** The waterfall approach provides more certainty regarding project schedules, as each stage needs to be finished before progressing to the next, simplifying the estimation of project duration and resource needs. This can be beneficial for MJ Logistics if they are expecting the implementation of the CRM on a certain date.
* **Requirements Gathering**: Under the waterfall methodology, every stage of the project, such as requirements gathering, design, development, testing, deployment, and maintenance, follows a sequential order. This structured approach permits detailed planning and documentation upfront. Which can be beneficial to us and the stakeholders as they will be aware of the next step in the process.
* **Identifying Risks Early:** Through extensive upfront planning, potential risks and challenges can be spotted at an early stage of the process, aiding in the implementation of suitable mitigation strategies.

## Disadvantages of Waterfall method

* **Not proficient in handling scope creep:** Scope creep is not effectively managed within the waterfall method due to its sequential and linear nature, where each phase must be finished before progressing to the next. This rigidity makes accommodating scope changes challenging and can potentially disrupt the entire project timeline and with MJ’s growing end users this will likely affect the end users in a negative way as they are still relying on a manual and tedious process for storing data.
* **Lack of Flexibility:** Waterfall projects heavily lean on upfront requirements gathering and documentation. It's frequent for requirements to shift or evolve during the project's advancement and this may delay Salesforce implementation date for MJ Logistics.
* **insufficient customer input:** Usually, customers are only involved at the start of the project when we gather requirements and plan. This means they might not have a say during the rest of the project, which could result in products that don't meet all their needs.

# C2. Best suited

Agile is perfect for MJ Logistics to install the Salesforce Customer Relationship Management (CRM) system because of a few key reasons:

Firstly, Agile puts customers first, making sure Salesforce fits exactly what MJ Logistics needs. It helps the team work closely with MJ Logistics' staff to understand what they want and what would make their work easier.

Secondly, Agile lets MJ Logistics start using Salesforce little by little, instead of waiting for the whole thing to be implemented. This means they can get useful parts of Salesforce sooner and give feedback to what will suit their needs better.

Lastly, Agile is great at adapting to changes. Since MJ Logistics' needs might change over time, Agile allows for adjustments along the way, so Salesforce can always stay useful and up-to-date. Plus, Agile encourages teamwork and communication, making sure everyone is on the same page and the project runs smoothly. Overall, Agile is the best fit for making sure Salesforce works just right for MJ Logistics.

# Create Two Representations of the Software Solution

## Reporting DIAGRAM

Microsoft Excel incorporates a feature that lets you bring in data from Salesforce objects and reports directly into your spreadsheets. Thus, showing how seamless integration of Salesforce data is within Excel. This representation shows how an end user can retrieve data from Salesforce while using MS Excel. The representation below shows the process diagram involving the buttons to click on when importing a report from Salesforce to Excel.A diagram of a diagram

Description automatically generated with medium confidence

## Gui ticketing system

Below is a wireframe depicting the graphical user interface (GUI) of Salesforce's intuitive internal ticketing system. The Tickets section is prominently displayed alongside other tabs, offering easy access. The list of tickets is presented in a well-organized structure, enhancing visibility and accessibility.

A screenshot of a computer

Description automatically generated

# Testing

# Test 1 – OS AND BROWSER SUPPORT TESTING

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| Requirement to be tested:  OS and Browser Support Testing. |
| Preconditions:  Before Implementing Salesforce, ensuring compatibility with the end user’s Browsers and OS systems is a crucial step in for smooth a user experience and system performance. This includes assessing browser support for Chrome, Firefox, Edge, and Safari, checking compatibility with Windows, macOS, iOS, and Android, verifying mobile device support, considering user accessibility requirements, optimizing configurations for performance, ensuring security compliance, and providing end-user training for a positive experience.  The browsers that must be tested are:   * latest Chrome and Chromium * latest Firefox * latest Microsoft Edge * latest Safari   The OS systems that must be tested are:   * Mobile and Tablet devices’ application support systems * latest iOS systems * latest Microsoft operating system * latest Android systems |
| Steps:  Browser testing – The browsers and operating systems included in this testing section are Safari 15, Chrome 97, Firefox 97, Microsoft Edge 98, Windows 11, and macOS Monterey.   1. Launch the application within the range of browsers and OS systems being tested. 2. Open a browser testing tool when opening Salesforce in each browser. 3. Explore the website thoroughly, testing its functionality across all operating systems. Focus on key features like navigation, forms, report sharing across different platforms, and interactive components. 4. Document any compatibility issues, the OS that was used for this test, bugs, or discrepancies encountered during testing. 5. Provide detailed information, including screenshots and error messages, to aid in troubleshooting and resolution. 6. Verify that the website functions as expected on each operating system. Look for any layout issues, display inconsistencies, or functional errors that might arise.   Mobile device OS testing – The Mobile OS in this testing include Android 12 and IOS 15.   1. Launch the application on two smartphones, one running on the iOS operating system and the other on the Android operating system. 2. Thoroughly explore the application, testing its functionality on both smartphones, paying particular attention to key features such as navigation, reports, and the process of importing or exporting data across different platforms. 3. Record any errors or compatibility issues encountered during testing with the respective devices. 4. Provide comprehensive information, including screenshots or any error messages, highlighting any missing features that are visible in the browser version but not on the mobile application. 5. Validate that the application operates as expected on each mobile device, making note of any issues, inconsistencies, or errors that may occur. |
| Expected results:   * Consistent Functionality: Salesforce should operate consistently across Windows, macOS, iOS, and Android. Enabling users to access all features effortlessly. * Optimal Performance: Salesforce should deliver fast loading times, smooth navigation, and responsive interactions regardless of the OS or mobile platform used. * Browser Compatibility: Salesforce must function flawlessly on popular browsers like Google Chrome, Mozilla Firefox, Microsoft Edge, and Safari, ensuring correct rendering and functionality. * Seamless Mobile Experience: Salesforce should provide a seamless, touch-responsive interface on both iOS and Android devices. Integrating mobile-specific features without encountering usability problems. * Cross-Platform Compatibility: Salesforce should support fluid data synchronization and collaboration across different OS and mobile platforms, allowing users to switch devices seamlessly. * The goal is to make sure that using Salesforce is always the same, dependable, and easy on different types of operating systems and devices. |
| Pass/Fail:  PASS:  The application behaves consistently across mobile devices, tablets, and computers, ensuring that it delivers the desired results and meets user expectations on each platform. |

# Test 2 – Ticketing system

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| Requirement to be tested:  Ticketing System |
| Preconditions:   * Salesforce Preparation: Ensure that the Salesforce is correctly installed, configured, and accessible in the test environment. * End user Account Setup: Create user accounts in Salesforce with appropriate access permissions for testing purposes. These accounts should have the necessary privileges to handle tickets effectively. * System Stability: Salesforce must remain stable and operational, free from any known issues or critical bugs that could affect the accuracy of test outcomes. * Ticket functionality testing: Prepare a collection of test data comprising sample tickets with diverse priorities and statuses to replicate real-world scenarios for testing the ticketing functionality in Salesforce. * Training end users: Make sure end users fully understand Salesforce, its ticketing features, and the ticketing process being evaluated. If needed, offer training or familiarization sessions to adequately prepare testers. * Top of Form |
| Steps:   1. Create test tickets or a test email to verify the system enables comprehensive tracking of all communications and inquiries with contacts. 2. Be sure it logs details such as caller identity, subject of issue, timestamp, and follow-up actions. 3. Each interaction is unique, and the system must automatically capture email responses, ensuring thorough record-keeping. 4. Verify the functionality of communication features like email notifications or in-app alerts to ensure users receive prompt updates regarding any modifications to tickets Salesforce. 5. Verify when closing or resolving ticket the system leaves an audit trail for past ticket information. Confirm he audit trail provides an elaborate account of interactions and modifications applied to tickets, ensuring transparency, accountability, and a method to track the progression of each ticket's journey. |
| Expected results:   * Test tickets or a test email are made to assess the system's ability to comprehensively track all communications and inquiries with contacts. * Details such as caller identity, issue subject, timestamp, and follow-up actions are successfully logged for each interaction. * The system automatically captures email responses, ensuring comprehensive record-keeping and uniqueness for each interaction. * Functionality of communication features like email notifications or in-app alerts is verified to ensure users promptly receive updates on any ticket modifications in Salesforce. * Upon closing or resolving a ticket, the system leaves a detailed audit trail for past ticket information. The audit trail should provide a comprehensive account of interactions and modifications made to tickets, ensuring transparency, accountability, and a means to track the progress of each ticket's journey. |
| Pass/Fail:  PASS:  Salesforce ticketing system by default does not have an automatic process for recording communication to and from users by email or phone. Although this is detrimental, Salesforce's ticketing system can be configured to automate certain processes, such as ticket creation, assignment, and notifications. This will be done before the system is released. |

# Test 3 – OPPORUNITY MANAGEMENT

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| Requirement to be tested:  Opportunity Management. |
| Preconditions:   * + Ensure that the workflow and activities necessary for the sales process are implemented.   + Enables users to manage and monitor these opportunities across the entire sales process, spanning from the first interaction to finalizing the agreement.   + Test data must be generated to replicate real-world scenarios for conducting the sales tracking test in Salesforce.   + Define the test scenarios and criteria for passing in clear terms, ensuring comprehensive documentation of expected outcomes for each test case.   + Make sure end users fully understand Salesforce and the opportunity management function being tested. |
| Steps:   1. Generate sample opportunities with diverse stages, amounts, and relevant details to mimic real-world scenarios effectively. 2. Ensure users can accurately create, view, modify, and remove opportunities. Assess functions like updating stages, calculating probabilities, perform win/loss analysis, competitive analysis, competitive product analysis, and discount approval and analysis. 3. Examine how opportunities move through various stages. 4. Validate that opportunities are accurately reflected in reports and dashboards, enabling users to monitor sales performance, predict revenues, and analyze trends efficiently. 5. Offer comprehensive training on opportunity management functionalities to end users. Address any feedback or issues raised during testing to ensure seamless implementation. |
| Expected results:   * **Implement Workflow and Activities for the Sales Process:** The system allows users to customize workflows and activities according to their sales process needs, enabling them to define stages and actions like lead qualification, opportunity creation, and follow-up tasks. With workflow automation, leads and opportunities move efficiently through the defined stages, streamlining sales pipeline management. Activities such as emails, calls, meetings, and tasks can be easily tracked, logged, and linked to the respective leads or opportunities for comprehensive monitoring. * **Competitive Analysis:** Users can conduct comparative assessments of their offerings against competitors, identifying strengths, weaknesses, and distinguishing features. Utilizing competitive analysis tools, they gain valuable insights into market dynamics, competitor strategies, and opportunities for enhancement. * **Establishing and tracking the Pipeline:**   The system offers a visual depiction of the sales pipeline, showing the advancement of leads and opportunities through distinct stages. Users gain insight into lead and opportunity status, aiding in bottleneck identification, prioritization, and emphasis on high-value prospects.Top of Form |
| Pass/Fail:  PASS  The test succeeded because of Salesforce's capabilities aligning with the desired functions of MJ Logistics. Salesforce provides extensive options for opportunity management, catering to all the company's requirements.  Top of Form |

# Sources

**Reporting and data analytics for Salesforce – implementation options**. (n.d.).Nextian.com. <https://nextian.com/salesforce/reporting-and-data-analytics-for-salesforce-implementation-options/>