VA Salesforce Project XYZ

Technical Design Documentation

Department of Veterans Affairs

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Version 1.1

Revision History

Version	Date	Author	Description
1.0	01/28/17	CoE Team	Initial Version
1.1	03/01/17	CoE Team	Revised
1.2	5/31/18	DTC Team	Added content

Table of Contents

Introduction

1.1 Objective of the Document

This document describes the technical features and implementation of the Salesforce module XXX.

Briefly describe project XXX.

1.2 Glossary

Table 1

Word	Definition
XXX	Definition

Data and Visibility

The objects used in the module with their links are displayed in the data model below.
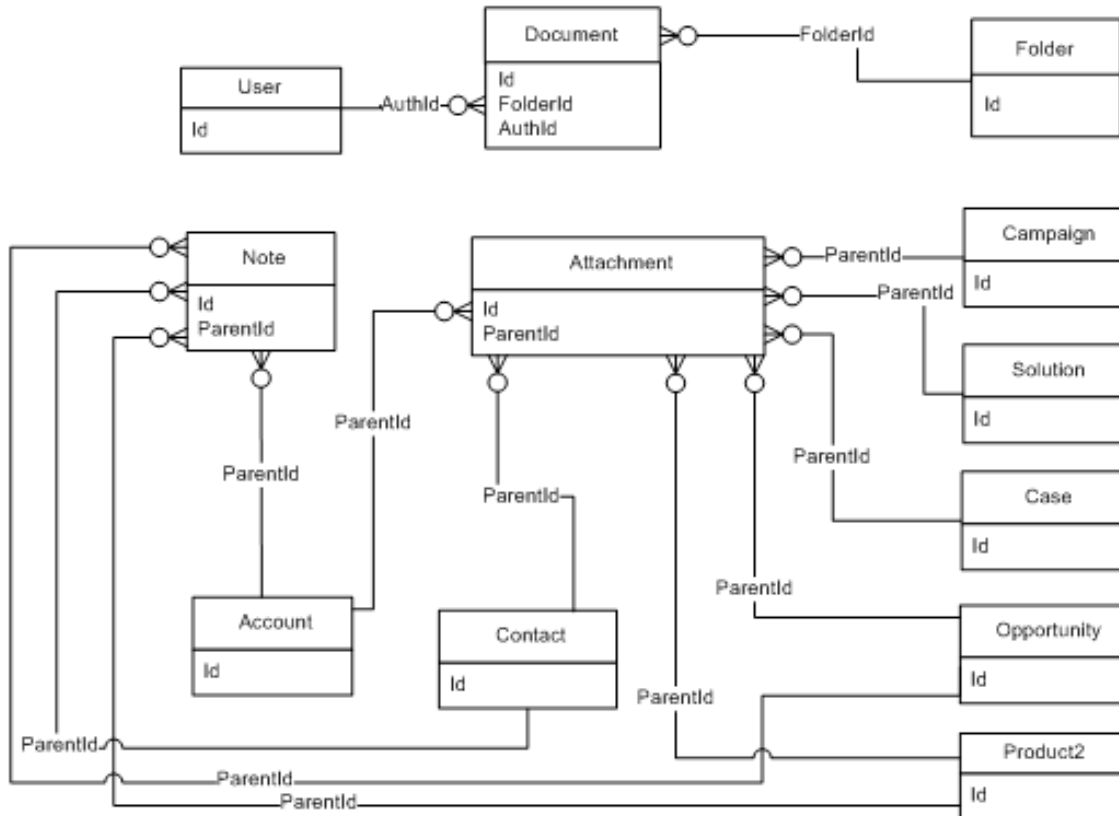
Figure 1: Data Model

The data dictionary is published in the workbook document *LV-SPO-Workbook-v1.0.xlsx*.

2.1.1   The XXX object

Brief description of the custom object XXX.

2.1.2   The YYY object

Brief description of custom object YYY.

2.2 The Security Model

The Salesforce object's visibility is controlled at the top level by the security model of visibility defined for the object.

The object visibility may be:

- Public read only
- Public read write
- Private (only visible by its owner)
- Controlled by parent

A private object can be shared from a public group; a role; a role and all its subordinates to a public group; a role; and / or a role and all its subordinates. The table below shows the security model defined for each object:

Table 2: Security Model

Object	Public read only	Private	Controlled by parent (Opportunity)
		X	
		X	
			X
			X
	X		
	X		
	X		
	X		

The Users and the User Permissions

3.1 The User Roles

Three user roles are involved in the special-order process:

Table 3:User Roles

Role	Who	Action
XXX		
Production	One person per product category: - Leather goods - Accessories - Watches	The production user makes or refuses the quotation, manages the creation and supervises the order during the production phase.
Other	Can be the zone approver, the marketing approver, the super CA the client service center or anyone else.	

3.2 User Permissions

3.2.1 Data Access Permissions

In Salesforce, each user is linked to only one profile. The profile defines the kinds of operations a user can apply on each object (create, read, write, delete).

Table 4:Permission Sets

Permission	Read	Create	Modify	Delete	Read	Create	Modify	Delete	Read	Create	Modify	Delete	Read	Create	Modify	Delete
Object	**Permission set/profile XXX**				**YYY**				**ZZZ**				**All users**			
XXX	☐	☐	☐		☐	☐	☐		☐		☐		☐			
XXX	☐	☐	☐		☐	☐	☐		☐		☐		☐		☐	
XXX	☐				☐				☐				☐	☐	☐	
XXX	☐	☐			☐	☐			☐		☐		☐	☐		

xxxx	☐				☐			☐			☐		
xxxx	☐				☐			☐			☐		
xxx	☐				☐		☐			☐			
xxx	☐				☐		☐			☐			

The User Configuration

3.3.1   The Permission Sets

Permissions sets give the users permissions on all the components elements of the module (objects, pages, module) and defines the role of the user.

Seven permission sets have been created for the XXX module:

- XXX
- YYY

3.3.2   The Profiles

What profiles will your users for module XXX get?

3.3.3   The User Detail Screen

All the information which defines the permissions and the role of the user are updated in the user form:

- The Profile
- Role
- The Permission Set

Here are different permission sets available according the user role & profile for this module:

Table 5:User Roles and Permission

User role	Salesforce Profile	Salesforce Permission set

Please note:

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- Any special notes.

3.4 Access to the Application and User login

3.4.1   SSO

What SSO configuration is used for the users for project XXX

3.4.2   Community

What community (if any) are the users to be included.

Process

4.1 The Macro-Process

#### 4.1.1   The Schema of the Process for Module XXX

EXAMPLE:
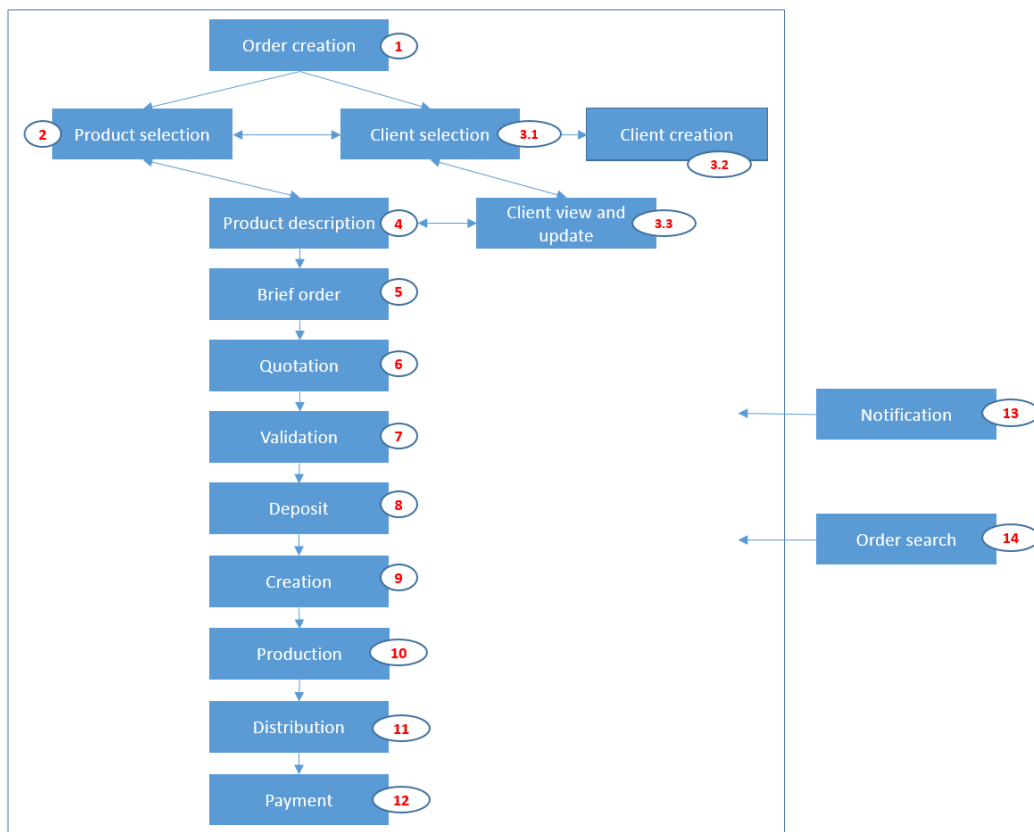
Figure 2:Macro-Process

4.1.2   Description of Steps

The main steps are described in the table below.

The steps may be skipped depending on the type of special order.

Table 6:Macro-Process

#	Main process features	Comment	Ref.
1	Order creation	A new special order is created with the mandatory information: the store, the CA code	
2	Base product selection	The base product is selected in Salesforce in the Product Referential object.	
3.1 3.2 3.3			
4			
5			

4.1.3 The XXX Processing Permissions

The permissions are described in the table below. All users have the same permissions as the store user if they created a product order and they are consequently the owner of the special order.

Table 7:User Permissions

Action / Users	User type 1	User type 2	All others
Search	Allowed	Allowed	Allowed
Create Case	All (1)	All	All (1)
Create new object X	Yes	No	No

(1) Footnotes for anything above
(2) Footnote 2

4.2.1   The Process XXX and Sub-Processes

The client selection and creation process is described in the schema below.

EXAMPLE:
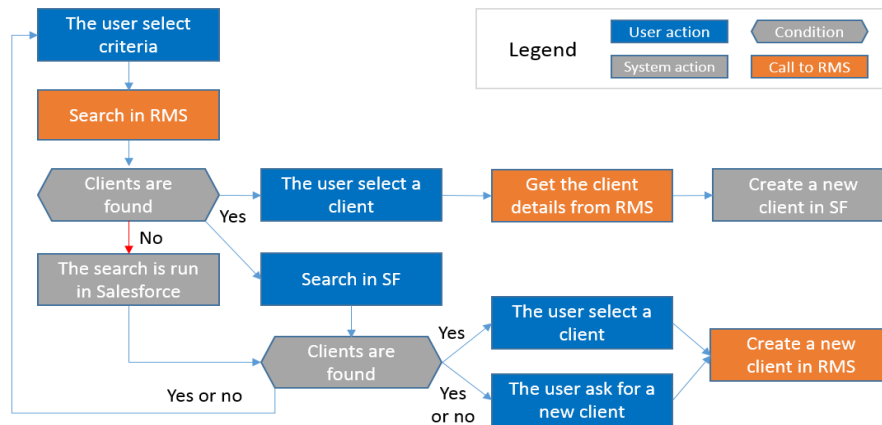
Figure 3:Selection Process

4.2.2   The Process XXX

Table 8:Process XXX

User	XXXX	Description
Status	Case Created	
Next status		
Skipped	If there is a case already in the system	
Description	The user attempts to enter the case, Error received if the case already exists, User enters following details for the case: X, y, z.	Any special notes: Following fields are required, etc.
Salesforce object	Ex. Case	

Updated fields		
Layout, Visual force page, Workflow, Process Builder, Visual Flow		

4.3 Workflows

This section describes all the workflows.

4.4 Process Flows

This section describes all the process builder flows.

4.5 Apex Triggers

This section describes all the Apex triggers (with approval codes for exception request – TBD in VA).

4.6 Visual Force Pages

This section describes all the VF pages (with approval codes for exception request – TBD in VA).

4.7 Report Types

This section describes all the Report Types.

4.8 Apex Classes

This section describes all the Apex Classes (with approval codes for exception request – TBD in VA).

4.9 Visual Flows

This section describes all the Visual Flows.

4.10   Custom Metadata

This section describes all the Custom Metadata (with approval codes for exception request – TBD in VA).

4.11   Page Layouts

This section describes all the Page Layouts.

4.12   Record Types

This section describes all the Record Types.

4.13 EinStein Analytics Dataflows/Dashboards

This section describes all the EinStein Analytics Dataflows/Dashboards.

4.14 Batch Jobs

This section describes all the Batch Jobs.

4.15 Other Custom Components

This section describes any other customizations.

4.16 The Custom Settings

XXX custom settings are used:

- Custom Setting 1
- Custom Setting 2

4.16.1 Custom Setting 1

(screen shot ok)

Table 9

Name	Value	Comment

4.16.2 Custom Setting 1 Picklist Dependency

Table 10

Name	Category	Referential Category	Record Type
Accessory	Accessories	Accessories	Special Order Accessory

Leather good	Leather goods	Leather Goods	Special Order Leather Good
Watch	Watches	Watches	Special Order Watch

4.17 The Custom Labels

The custom labels used are XXX.

Other Components

4.18   Any other custom components not covered above.

Managed Packages

4.19   Describe any dependent managed packages that will be used by this app (Appexchange).

Integrations

4.20   The technical interfaces

Three kinds of interfaces are used:

- Web services XXX
- The ETL Stage Database
- The XXX connector used by XXX

4.21   The schema of the data flows for the interfaces

Table 11:Table of the interfaces

N°	Source	Destination	Type	Responsible	Comment
0					
0					
0					
1					
2					
3					
3					
3					
4.1					
4.2					

N°	Source	Destination	Type	Responsible	Comment
5					
6					
6					
7					
8					

4.22   The web service calls

4.23   The interfaces managed by the ETL

Table 12

Source	Salesforce	
Target	SAP	
Periodicity	Each day	
Master system	Salesforce	
Salesforce object	XXX__c	
Fields	XXX__c (key) YYY__c Object XXX. Abc__c	Special Notes

4.24   Other documentation about the interfaces

The detailed documentation is defined in different documentations depending on the kind of interface and the responsible of the realization.

4.24.1 Documentation for the web service calls from Salesforce

4.24.2 Documentation of the ETL interfaces

4.24.3 Documentation for the web services

4.24.4 Documentation for XXX interfaces