

Requirements

At the base of many projects a direction is needed. Requirements are characterized as a desire of a product. Requirements details out how a product should behave.

Before all this is created, meetings are held for discovery and some documents that are produced before then like use cases, user stories or epics. These are starting points that will help clearly define what should be in the requirement.

Creation of simple statements and diagrams will provide a strong foundation for breaking down details and compiling them into requirements.

Commonly, as requirements are being made it should adhere to it being S.M.A.R.T.

S = Specific

M = Measurable

A = Achievable

R = Relevant

T = Time-bound

Requirement example

REQ - ID	RE00001
Title	Create Complaint form for customer service team in Salesforce case object.
Details	<ul style="list-style-type: none">- As a customer service rep I should be able to log a complaint entry on the case record page. Results should also appear in the page layout underneath the section “Complaint” and fields will be read-only mode in the case layout.- As a customer service rep I can select the following complaint categories : Internal, External, or Partner.- As a customer service manager I am able to make adjustments to the fields in the “complaint” section of the layout having editable permissions.
Concept	User will click on the “Log a Complaint” button on the case record. A screen will be presented with categories to select from. After clicking

	next there will be a set of fields applicable to each category.
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This above is just an example. There would have to be more details to what fields should appear for the category selection. This could be expanded further on. But for simplicity purposes let's keep it this way.

By the way this solution will require a screen flow.

Test Cases

A test case is designed to formally test a software. Test case is a document clearly defining the steps to test software features.

Test cases derive off of a document. In many cases from the requirements.
After having all the documents and knowledge in place. Test cases can be designed.

Writing an organized test case is crucial. This can be designed in a test management tool or in excel.

Let us use the requirement above to write out the test case.

Test Case Example

Test case ID	001
Test Case Name	Test internal complaint.
Requirement ID	RE00001
Data	Name: Tim Johnson Department: Accounting Problem: Trouble with mobile device. Description: test.
Tests steps	1. Go to a case record in salesforce. 2. Click the action "Log a Complaint"

	<ol style="list-style-type: none"> 3. Select internal category. Click next. 4. Fill out all fields presented on the page. 5. Click Done. 6. Check the Complaint section in the record page to see if data is populated in corresponding fields.
Expected results	<ol style="list-style-type: none"> 1. Relevant case record. 2. “Log a Complaint” button is present and launches a page. 3. Internal is selected and after clicking next. It will display the relevant field for internal. 4. Fields are filled in. 5. A pop up message stating “Submission complete” 6. Values should be present in the complaint section for what was filled out. Fields are in read-only mode.
Actual results	
Passed, Blocked, or Failed?	

Test case ID	002
Test Case Name	Test external complaints.
Requirement ID	RE00001
Data	Name: John Smith Location: Brooklyn, NY Problem: Trouble with software subscription. Description: test. Potential resolution: test.
Tests steps	<ol style="list-style-type: none"> 1. Go to a case record in salesforce. 2. Click the action “Log a Complaint” 3. Select external category. Click next. 4. Fill out all fields presented on the page. 5. Click Done. 6. Check the Complaint section in the record page to see if data is populated in corresponding fields.
Expected results	<ol style="list-style-type: none"> 1. Relevant case record.

	<ol style="list-style-type: none"> 2. “Log a Complaint” button is present and launches a page. 3. External is selected and after clicking next. It will display the relevant field for external. 4. Fields are filled in. 5. A pop up message stating “Submission complete” 6. Values should be present in the complaint section for what was filled out. Fields are in read-only mode.
Actual results	
Passed, Blocked, or Failed?	

Test case ID	003
Test Case Name	Test partner complaint.
Requirement ID	RE00001
Data	Name: Jennifer Linn Company: power123 Problem: Need access to partner portal and reports and dashboards show error. Description: test. Potential solution: test.
Tests steps	<ol style="list-style-type: none"> 1. Go to a case record in salesforce. 2. Click the action “Log a Complaint” 3. Select partner category. Click next. 4. Fill out all fields presented on the page. 5. Click Done. 6. Check the Complaint section in the record page to see if data is populated in corresponding fields.
Expected results	<ol style="list-style-type: none"> 1. Relevant case record. 2. “Log a Complaint” button is present and launches a page. 3. Partner is selected and after clicking next. It will display the relevant field for partner. 4. Fields are filled in. 5. A pop up message stating “Submission complete” 6. Values should be present in the complaint section for what was filled out. Fields are in read-only mode.

Actual results	
Passed, Blocked, or Failed?	

Test case ID	004
Test Case Name	Editable complaint field for customer service manager
Requirement ID	RE00001
Data	Name: Tim Johnson Department: test Problem: test Description: test.
Tests steps	<ol style="list-style-type: none"> 1. Go to a case record in salesforce with a complaint submitted. 2. Go to complaint section of the record. 3. Review and edit inputted values on fields. 4. Click save to update complaint fields.
Expected results	<ol style="list-style-type: none"> 1. Relevant case record. 2. Complaint fields are filled in. 3. Customer service manager is able to edit and input different values. 4. Fields are updated to what was inputted by the manager.
Actual results	
Passed, Blocked, or Failed?	

One requirement can have many test cases.

Requirement Traceability Matrix

This document is imperative to keep track of the relationship between the requirement and test cases. This allows for viewing the progress of the number of test cases executed with relations to the requirement.

This coincides as test coverage. In other words this is the best way to track if ALL test cases are performed and completed related to the requirement.

A great source for the template is at [stakeholder-map](#). Check it out!