Business Requirements Document

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| **Customer** | ABC Pvt Ltd |
| **Customer Project Lead** | Chanakya Sharma |

Revision History

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| **Version** | **Date (MM/DD/YYYY)** | **Changes** | **Author** |
| 1.0 | 10/12/2024 | Initial Document | Suryakant |
| 1.1 | 11/12/2024 | Updated Doc with Workflow Description and Workflow Diagram | Suryakant |
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Requirements:

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| What business process/problem will this workflow solve? |
| **Customer Support Escalation and Collaboration Workflow**    This Workflow Automates the handling of high-priority customer support cases by integrating Salesforce, Slack, Jira, and Google Drive for seamless communication, task tracking, and documentation. |
| What is the expected deployment date for this workflow? |
| **19 December 2024** |

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| What are the applications involved in this workflow / business process? |
| * Salesforce * Slack * Jira * Google Drive |
| When/how will this workflow execute? |
| * Automatically based on an event:   + When a high-priority case is logged or updated in Salesforce (e.g., Priority = "High")   **Workflow Description:**  1. Trigger:  A high-priority case is logged or updated in Salesforce (e.g., Priority = "High").  2. Action 1 (Salesforce to Jira):  Automatically create a Jira ticket with details like case description, priority, customer information, and SLA timelines  3. Action 2 (Jira to Slack):  Post a message in a designated Slack channel (e.g., #critical-support) with the Jira ticket link, customer name, and summary.  4. Action 3 (Slack Collaboration):  Enable Slack actions:   * Assign a team member/ Add Comments to Jira directly from Slack.   5. Action 4 (Documentation in Google Drive):   * Generate a case summary document in Google Drive, including the Salesforce case ID, Jira ticket details, and any initial notes or attachments. * Share the Google Drive link in the Slack message for easy access.   6. Action 5 (Status Updates):  Update Salesforce with real-time status changes from Jira (e.g., when the ticket is marked as “In Progress” or “Resolved”).  7. End Result:  Notify stakeholders in Slack when the issue is resolved, including links to the updated Salesforce case, Jira ticket, and final Google Drive document. |
| How soon do you want this data synced/moved? |
| * As soon as it happens |
| What data do you want to process? |
| * New or updated data |

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| Workflow Diagram |
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