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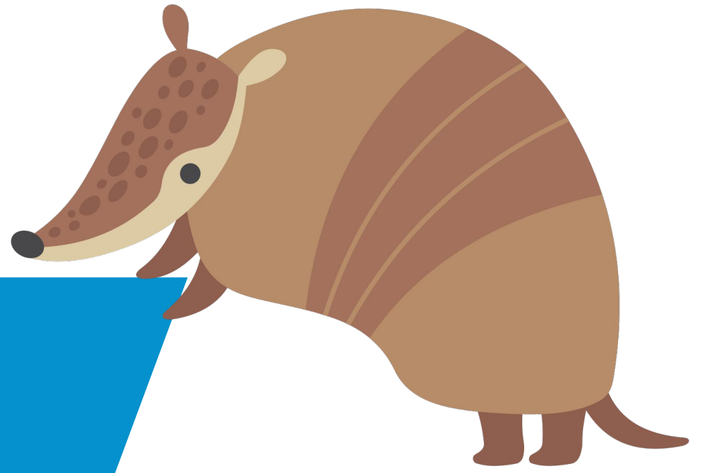

Developer Communication

for Salesforce Admins

Presentation by

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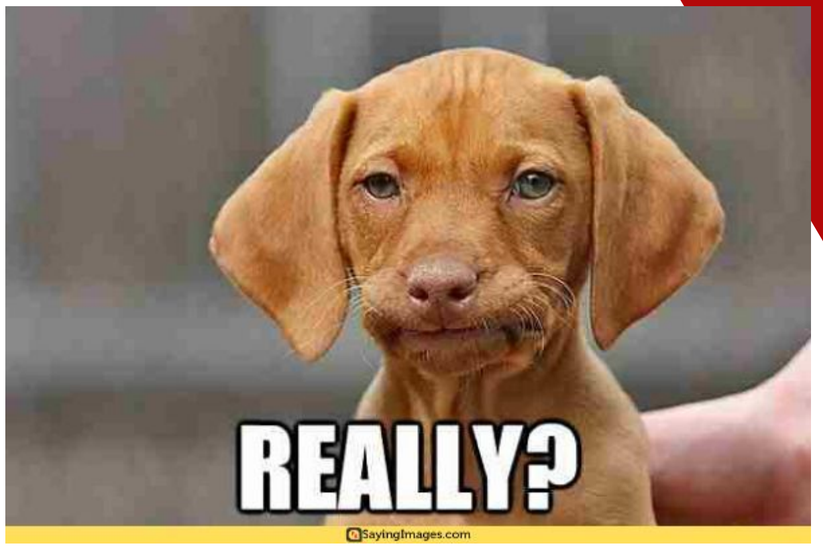
Communication is difficult

Miscommunication leads to:

- Misaligned Expectations
- Missing Functionality
- Bugs/Errors
- Too many emails, calls, and meetings
- More work
- Delays, disappointment, and blame
- Stress and Frustration for everyone!



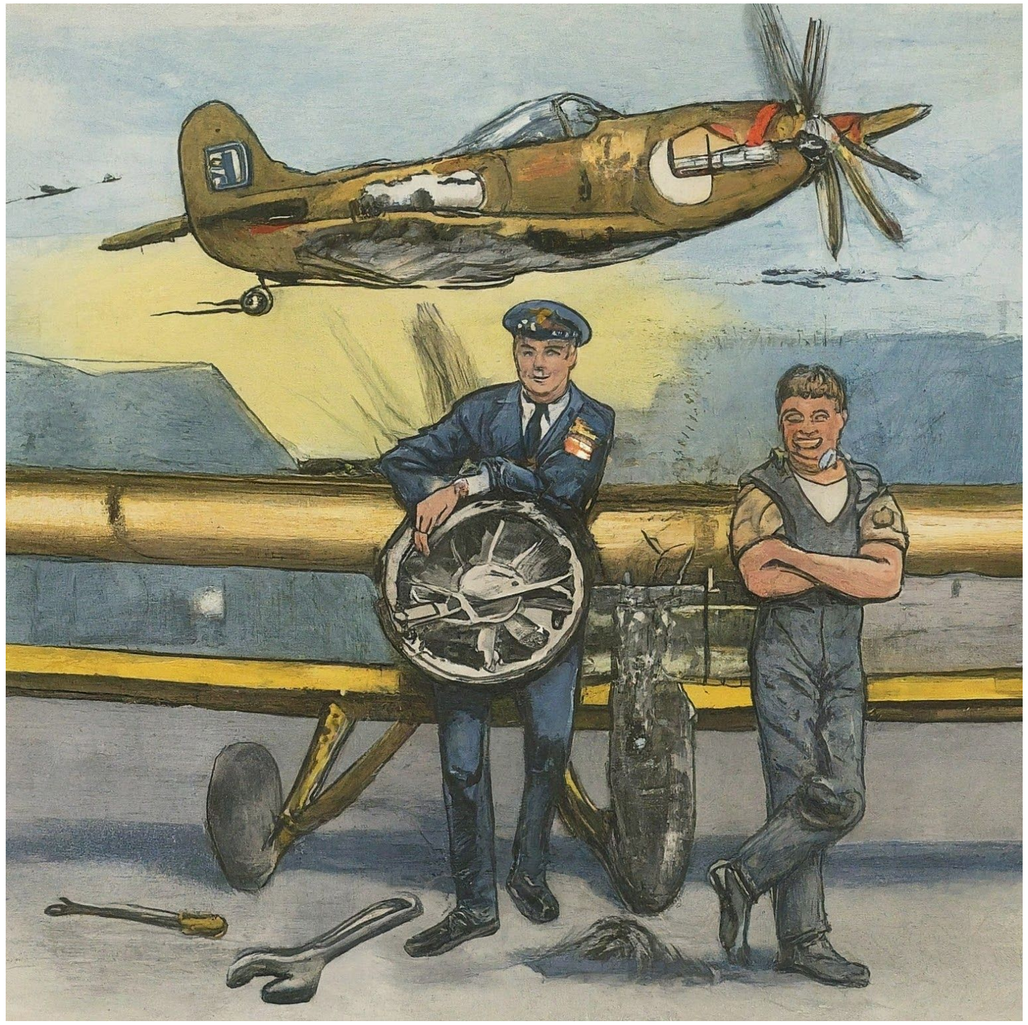
Administrators tend to talk about:

- Concepts
- People
- Processes
- Tabs
- Field Labels
- Clicks
- Needs
- Whens
- Shoulds
- Can’ts

Developers tend to talk about:

- sObjects
- Operations
- Events
- API Names
- Queries
- DML
- Limits
- Synchronous vs Asynchronous
- Where Clauses
- Equals

Both Experts are needed to get Passengers to their Destination



Options for Providing Developer Friendly Requirements

- Provide Screenshots with numbers and legend
- Record Video walkthrough with explanations
- Provide both Labels and API Names of Objects/Fields
- Mockup User Interfaces with Avonni or Image Editors
- Ask your Developers to provide you with sample requirements

What’s Wrong With This (Example 1)

When an Order is Closed
Update the Account to be a Customer

What's Wrong With This (Example 2)

Write a Before Update Trigger to update the Type__c field on Account records when Order__c.Status__c is changed to 'Closed'

Developer Friendly Requirements

When any User saves an Order__c record
AND the Status__c field was just changed to have a value of “Closed”
IF the related Account record specified in the Account__c field does not have the value “Customer” in its Type field
THEN update the Account record to have the value “Customer” in its Type field.
(It’s ok for this can’t happen immediately as long as it happens within 5 minutes)

Use both sides of the “card”

Business Requirements

- Your existing user stories that describe what the business needs and what the definition of success is.

Developer Requirements

- At a minimum, a reference that translates the words in the user story to the Events and API names needed by Developers.
- Bonus Points: Rewrite the user story to use the Events and API names that Developers use

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Sample Requirements Document

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Description	2
User Requirements	2
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Sample Requirements Document (actual requirements hidden due to confidentiality)

Create new Lightning Web Component for [Business Process] with title [LWC Title] displaying the following:

- An Email input field
- A dropdown for “Type” with values [A,B,C]
- A checkbox with label “I acknowledge I have read this form”
- A dropdown for “Subscribe to Newsletter” with values [Yes, No]
- Submit button

Upon clicking the Submit button, a new [sObject] should be inserted with the values populated as follows:

Email => Email__c

Type => Type__c

Subscribe to Newsletter => Newsletter__c

Then an input form should be hidden and either a confirmation message or an errorm message (if one occurred) should be displayed

Someone has to make the first move

It should be you

Meet them halfway

Learn how your Developers prefer to receive requirements. Learn enough to be able to answer their questions.

Create Documentation

Document how to provide your Developers with Requirements. Document the Objects used in your processes. Document your user Groups. Create a Thesaurus.

Invest in the relationship

The more you work with your developers the better you'll understand what they mean and they'll understand what you mean.

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Questions?

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