

# Well-Architected Design Standards Template

*Note that all italicized items in the sections below are examples. Remove or modify them and add your own as needed. Add or modify sections as needed and remove any sections that are not relevant to your organization.*

## Overview and Scope

This document contains design standards for Salesforce Projects delivered by [Organization]. It specifically covers Salesforce Architecture and related topics. It does not cover [list any exclusions here (example: non-Salesforce systems)]. [Add any additional organization-specific overview text here].

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## Guiding Principles

This section contains a list of guiding principles that will be used to define all standards outlined in this document. If you're unclear about why a standard is in place or whether a standard needs to be added or changed, refer to this list.

- Use built-in Platform services and avoid customizations whenever possible
  - Consider AppExchange apps before building a custom solution
  - Use low code (declarative) customizations before writing code
  - [Insert additional organization-specific guiding principles here]
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## Definitions

This section contains definitions of terms that are used throughout this document.

Term	Definition
API	Application Programming Interface - Provides programmatic access to information or functionality within your system.
Stateful	Communications that retain information about transactions or sessions
Stateless	Communications that do not retain information about transactions or sessions
Synchronous	A process or function that executes a task within a single thread, requiring the user to have to wait until it finishes before completing any additional tasks.
Asynchronous	A process or function that executes a task "in the background" without the user having to wait for the task to finish.
[Add additional Terms Relevant to your Organization]	[Definitions]

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## Naming Conventions

This section contains rules to follow when naming entities in your system. Naming conventions must be followed to ensure readability and long term maintainability. Refer to [Simple - Readability](#) for more information.

### GENERAL RECOMMENDATIONS

- Use whole words, avoid acronyms and abbreviations.
- Always fill the description field on custom components.
- For "natural text" capitalization, capitalize principal words and lowercase minor words.

Type	Capitalization	Naming Convention	Comments	Wrong Examples	Good Examples
Apex Class	PascalCase ▾	<Namespace>.<Class Name><Optional Suffix>	<ul style="list-style-type: none"> <li>- Namespace: optional. Short, often an acronym. Use only for classes that are exclusive to a single app/project, and sure to stay that way over time. Don't confuse this with the namespace as used in packages or dev orgs!</li> <li>- Class name: nouns, describing the class's functional purpose. Avoid acronyms and abbreviations.</li> <li>- Suffix: indicates common class types - Controller, Extension, Handler, Utilities, TriggerHandler.</li> </ul>	<ul style="list-style-type: none"> <li>CustomerAssessment - Lacks project namespace + suffix, not obvious what it does.</li> <li>SmallBusinessConfigureAndPricingTool_ControllerAssessmentController - Namespace too long. Use acronym instead.</li> <li>SBCPTCustomerAssessmentController - Where does namespace end and class name start? Use underscore.</li> <li>SBCPT_Customer_Assessment_Controller - Uses underscores within the class name.</li> </ul>	SBCPT_CustomerAssessmentController
[Insert your own items]	▾				

# Data Management

This section contains information about data classifications, encryption requirements and archiving and purging criteria.

## Data Classifications

This section contains information about data owners, field usages, data sensitivity, and compliance categorization relevant to any standard or custom object and field. Data classifications must be taken into consideration for all system configuration and automation design processes in order to ensure that data usage remains in compliance with legal, industry and organizational policies and regulations. Refer to [Compliant - Legal Adherence](#) for more information.

Object	Field	Data Owner	CCPA - California Consumer Privacy Act	COPPA - Children's Online Privacy Protection Act	GDPR - General Data Protection Regulation	HIPAA - Health Insurance Portability and Accountability Act	PCI - Payment Card Industry	PII - Personally Identifiable Information	Other Compliance Categorization or Company Policy	Data Sensitivity Level	Field Usage
Contact	First Name	Sales	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	Internal ▾	Active ▾
Contact	Last Name	Sales	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	N/A	Internal ▾	Active ▾
Contact	Credit Card Number	Sales Ops	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	N/A	Confidential ▾	Active ▾
Contact	Date of Birth	Sales	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	N/A	Restricted ▾	Active ▾
[Insert your data]			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	▾	▾

## Encryption

This section contains information about fields to encrypt either in transit, at rest or both. This information must be taken into consideration during the design of automations and integrations to ensure that data is not inadvertently exposed to security vulnerabilities. Refer to [Secure - Data Security](#) for more information.

Object	Field	Encrypted in Transit	Encrypted At Rest
Contact	First Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contact	Last Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contact	Date of Birth	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contact	Credit Card Number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
[Insert your data]		<input type="checkbox"/>	<input type="checkbox"/>

## Data Archiving and Purging

This section contains information about archiving and purging criteria for the objects in your system. This information must be taken into consideration during the design of any automated archiving and retrieval processes. Refer to [Resilient - Continuity Planning](#) for more information.

Object	Criteria for Archiving	Criteria for Purging	Special Considerations
Account	Organization closed or no activity for more than 36 months	Same as archiving	Archive all related contacts and transactions and maintain relationship information in the archive system.
Contact	No longer associated with the account OR no activity for more than 18 months	Same as archiving	Archive or update the primary contact on all related transactions
Case	Status = Closed for more than 12 months	Status = Closed for more than 24 months	Retain the calculated values of all formula fields during the archival process.
[Insert your own data]			

# Automations

This section contains information about approved design patterns for automations, protocols for cross component communications, custom settings and error handling.

## Approved Design Patterns

This section contains information about design patterns that are approved (or not approved) for specific use cases. Refer to [Automated - Transaction Handling](#) for more information.

Pattern	Approved Use Cases	Do NOT use when...
Synchronous Operations	Logic that is relevant to what users need done in real time or near real time	
Asynchronous Operations [Insert your own patterns]	Logic that can be deferred to a later time	Users require results in order to complete a subsequent task.

## Protocols for Cross Component Communications

This section contains information about the protocols to use when sending communications between components within the same system. Refer to [Composable - Interoperability](#) for more information.

Protocol	Use Case	Do NOT use when...
REST API [Insert your own]	Create a record	

## Alerts, Notifications and Error Messages

This section contains information about the process to handle errors and notifications for different types of events within the system. Refer to [Automated - Error Handling](#) for more information.

Message Type	Pattern	Expected User Action	Approved Use Cases	Do NOT use when...
Error Message	Modal Window	Follow the instructions in the message	Users need to take action on an error message before continuing	Do not use for warnings or notifications
Notification during a process [Insert your own information]	Toast Message	Read the message and be aware of it	Users need to be informed of a warning or process completing	User action is required

# Integrations

This section contains information about connected apps, tokens and the overall message structure for integrations. Note that design patterns are listed in the Approved Design patterns in the Automation section.

## Connected App and Token Use Cases

This section contains information about approved connected apps, token types and scopes. Formal approval is required for any use cases that aren't explicitly listed in this table. Refer to [Connected Apps](#) and [OAuth Tokens and Scopes](#) for more information. Refer to [Security - Session Security](#) for more information.

App Name	Use Case	Token Type	Token Scope
Website App [Insert your own]	Inbound integration from Website to Create and edit orders	Access Token	Full

## Message Structure

This section contains information about the elements included in messages and their description. All messages sent between components and systems should adhere to this standard. Refer to [Composable - Interoperability](#) for more information.

Element	Description
Header	Contains information about the message itself
Inbound Property	Contains information about message source
Outbound Property	Contains information about the message target
Payload	Contains the business-specific data being transferred
[Insert your own]	

## Artificial Intelligence

This section contains information for approved use cases for AI-based tools along with design standards for chatbots.

### AI Use Cases

This section contains information about approved and unapproved use cases for AI related tools and functionality. Refer to [Compliant - Artificial Intelligence](#) for more information.

Tool	Approved Use Cases	Do NOT use for...	Considerations
Chatbots	Service Cloud Call Deflection		See chatbot design standards
Einstein Discovery	Identify patterns in data based on contact purchasing habits	Identify patterns in data based on contact postal codes (may introduce bias)	
[Insert your own]			

### Chatbot Conversation Design Standards

This section contains a list of required and optional conversation features for chatbot designs. Refer to [Compliant - Artificial Intelligence](#) for more information.

Bot Action	Must Have	Nice to Have
Greets the customer	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Identifies itself as a bot	<input checked="" type="checkbox"/>	<input type="checkbox"/>
States what it can do	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Takes communication turns with the user	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Leaves time for the user to read what it says	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Creates a path for follow-ups	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Apologizes when it can't do something	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Gives and acknowledges gratitude	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Closes the conversation	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Draws attention to buttons or menus	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Addresses the customer by name	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Lets the customer finish typing	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Uses menus to help the customer get started	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Uses quick replies to help the user end a conversational path	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Acknowledges trouble in the chat	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Has a clear voice and tone that is consistent with the organization's messaging	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Avoids all caps (Shouting)	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Uses emojis for levity	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Collects customer feedback about its interactions	<input type="checkbox"/>	<input checked="" type="checkbox"/>
[Insert your own]	<input type="checkbox"/>	<input type="checkbox"/>

## User Experience

This section contains information about UX related topics, including Accessibility, language translations and in-app guidance.

### Navigation

This section contains information about the different tools users may use to navigate or input data into your system. Refer to

[Engaging - Navigation](#) for more information.

Input / Navigational Device Type	Use Cases	Testing Process
Keyboard	Standard Navigation	
Mouse	Keystroke-Based Navigation	
Screen Reader	Users with visual impairments	Use screen reading software [x]
[Insert your own]		

## Visual Cues

This section contains information about the visual cues you will present to users to help them navigate your application. Cues should be use consistently across all screens and take accessibility into consideration. Refer to [Engaging - Navigation](#) for more information.

Visual Cue	Meaning
Green right arrow	Next
Red X	Cancel
[Insert your own]	

## Language Translations

This section contains information about words and phrases that will be translated into supported languages within your system. Be sure to take cultural norms into consideration when making translations and ensure that all translations make sense and are not offensive to native speakers of each supported language. Refer to [Engaging - Notifications and Messages](#) for more information.

Word or Phrase	[Supported Language 1] Translation	[Supported Language 2] Translation	[Supported Language n] Translation
Hello	Hola	Bonjour	Ciao
[Insert your own]			

## In-App Guidance

This section contains information about In-App guidance that will be added to your system to help users understand how to use new features and functionality. Refer to [In-App Guidance in Lightning Experience](#) for more information. Refer to [Engaging - In-App Guidance](#) for more information.

Use Case	Message Triggers	Message Frequency	Patterns
New Desktop Feature	User navigates to the page associated with the new feature	Once	Display arrows that point to navigation controls with a brief description of their functionality.
New Mobile Feature	User opens the app	Once	Highlight the controls associated with the new feature and provide a link users can tap to view additional information.
[Insert your own]			

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# Application Lifecycle Management

This section contains information about development tools, environments, source control, packaging, test plans and documentation standards.

## Approved Development Tools

This section contains a list of tools that are approved for development, along with specific use cases that they are approved and not approved for. Refer to [Resilient - Application Lifecycle Management](#) for more information.

Tool	Approved Use Cases	Do NOT use when	Notes
SOSL	Searching		SOSL returns sObjects that need to be cast as records for subsequent DML operations.
SOQL	Data Operations	Simply locating records	
[Insert your own]			

## Environment Strategy

This section contains information about how administrators and developers will use the various sandbox and scratch org environments that are available in your landscape. Refer to [Resilient - Application Lifecycle Management](#) for more information.

Environment Type	Usage	Refresh Interval	Change Migration Process
Full Copy Sandbox	UAT, Performance, UX, Accessibility Testing	Monthly	Package Installation
Partial Copy Sandbox	Integration Testing	Weekly	Package Installation
Developer Pro Sandbox	Prototyping/Demo	As Needed	Push / Pull from Source
Developer Sandbox	N/A	As Needed	Push / Pull from Source
Scratch Org	Local Development with installed packages		Package Installation

## Source Control Information

This section contains information about the source control system that's currently in use at your organization, along with additional relevant details, including check-in and check-out processes. Refer to [Resilient - Application Lifecycle Management](#) for more information.

System	GitHub
URL	https://github.com/[MYORGANIZATION]
Check-In Process	Information about your organization's check-in process
Check-Out Process	Information about your organization's check-out process

## Currently Defined Package Units

This section contains a list of currently defined package units and their contents. Refer to [Composable - Packageability](#) for more information.

Name	Description
pkg_Case	Contains Automations associated with Case Creation and Assignment
[Insert your own]	

## Test Plans

This section contains approaches for the different types of testing your teams will perform in order to approve any changes prior to moving them to production. Refer to [Resilient - Application Lifecycle Management](#) for more information.

Category	Approach	Considerations
Unit Testing	Developers in Scratch Orgs and Developer Pro Sandboxes	
Integration Testing	Project team members in Partial Copy Sandbox	
User Acceptance Testing	Business Users in Full Copy Sandbox	
Accessibility Testing	Accessibility Device Simulators	Use a third party accessibility testing service for major releases
Performance Testing	via Automated Script	
Regression Testing	Automated Test Scripts	
Penetration Testing	via Third Party Service	
[Insert your own]		

## Documentation Standards

This section contains standards for documentation creation and maintenance. All development and configuration documents stored in [central location name] and contain the following information. Refer to [Simple - Readability](#) for more information.

Element	Description
<i>Solution Overview</i>	<i>Purpose of this solution and its relevance to the business</i>
<i>Solution Owners</i>	<i>Business and IT owners for the solution</i>
<i>Process</i>	<i>Specific process(es) that are to be automated.</i>
<i>Dependencies</i>	<i>Dependencies on any other processes or solutions</i>
<i>KPIs</i>	<i>Description of how success will be measured</i>
<i>Patterns</i>	<i>Applicable process flow and architecture diagrams for all patterns used in the solution design</i>
<i>Decisions</i>	<i>List of Key Design Decisions, along with options considered, tradeoffs and reasoning behind the final decision</i>
[Insert your own]	

## Appendix I - Process to Update These Standards

This section contains the process to request and approve updates of this document.

## Appendix II - Change Log

This section contains the revision history of this document.

Date	Description of Change	Change made by
1/1/2022	Updated approved design patterns	Tom Leddy
[Insert your own]		