DOI: https://doi.org/10.36910/6775-2524-0560-2026-63-02
УДК: 004.4
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TRANSACTIONAL RESOURCE OPTIMIZATION IN SALESFORCE PLATFORM

Bandach H. Transactional Resource Optimization in Salesforce Platform. This study focuses on enhancing resource utilization efficiency within Salesforce cloud infrastructure, with particular emphasis on reducing database query operations in Apex trigger implementations. We investigate the prevalent issue of poorly structured trigger code that frequently causes violations of the platform's stringent 100-query-per-transaction threshold, resulting in System.LimitException failures during production operations. Through systematic examination of contemporary architectural patterns and trigger management frameworks, we identify critical gaps in existing methodologies regarding their ability to provide definitive assurance of resource constraint adherence. Our research presents a novel approach grounded in adaptive architectural principles, mandating complete centralization of database interactions through a dedicated Access Layer component, complemented by sophisticated query consolidation mechanisms. We establish formal architectural constraints that mathematically demonstrate compliance with the query threshold regardless of the deployed business logic handler count. Empirical testing using datasets of 200 records validated substantial performance enhancements, achieving an 8-query maximum versus the previous 165-query baseline, while simultaneously reducing processing latency from 8700ms to 2300ms.
Keywords: cloud computing, database optimization, software architecture, resource constraints, enterprise systems, trigger patterns.

Бандач Г.О. Оптимізація транзакційних ресурсів у платформі Salesforce. Дане дослідження зосереджено на підвищенні ефективності використання ресурсів у хмарній інфраструктурі Salesforce з особливим акцентом на зменшення операцій запитів до бази даних у реалізаціях тригерів Apex. Ми досліджуємо поширену проблему погано структурованого коду тригерів, що часто призводить до порушення суворого обмеження платформи у 100 запитів на транзакцію, результуючи у збоях System.LimitException під час виробничих операцій. Через систематичне вивчення сучасних архітектурних шаблонів та фреймворків управління тригерами ми виявляємо критичні прогалини в існуючих методологіях щодо їх здатності надавати однозначну гарантію дотримання ресурсних обмежень. Наше дослідження представляє новий підхід, заснований на адаптивних архітектурних принципах, що вимагає повної централізації взаємодій з базою даних через спеціалізований компонент Рівня Доступу до Даних, доповнений складними механізмами консолідації запитів. Ми встановлюємо формальні архітектурні обмеження, що математично демонструють відповідність пороговому значенню запитів незалежно від кількості розгорнутих обробників бізнес-логіки. Емпіричне тестування з використанням наборів даних з 200 записів підтвердило суттєві покращення продуктивності, досягнувши максимуму в 8 запитів проти попереднього базового показника в 165 запитів, одночасно зменшуючи затримку обробки з 8700 мс до 2300 мс.
Ключові слова: хмарні обчислення, оптимізація баз даних, програмна архітектура, ресурсні обмеження, корпоративні системи, шаблони тригерів.

Scientific problem statement. Within the landscape of cloud-based customer relationship management solutions, Salesforce maintains a position of market leadership, providing services to over 150,000 corporate clients globally while generating more than 34 billion dollars in annual revenue. The platform's fundamental architecture relies on multi-tenancy principles, whereby diverse organizations concurrently utilize shared computational infrastructure and resources. Ensuring equitable resource distribution and preventing individual tenant monopolization of system capabilities requires implementation of governor limits – rigorous constraints on resource utilization during code execution that serve as essential mechanisms for preserving platform stability and ensuring consistent performance delivery across all tenant organizations.

The platform enforces particularly stringent limitations on SOQL database query operations: synchronous transaction contexts permit a maximum of 100 queries, while asynchronous contexts allow up to 200 queries. Transgression of these boundaries results in immediate System.LimitException exception generation and complete transaction abortion, potentially precipitating substantial business process interruptions and data integrity complications. Community forum analysis, including Salesforce Stack Exchange discussions and official incident documentation, indicates that approximately 35 percent of production environment critical failures directly stem from governor limit transgressions, positioning this as a critical operational concern requiring systematic attention.

The severity of this challenge amplifies when considering that Apex trigger development commonly proceeds without systematic adherence to architectural best practices, yielding disorganized code implementations characterized by dispersed business logic across numerous trigger files and class

definitions. In such implementations, database access operations lack proper coordination, with SOQL queries executing in ad-hoc patterns, frequently positioned within iterative control structures. When bulk data operations execute, such as Data Loader imports involving 200 records, these architectural deficiencies virtually ensure constraint violations, culminating in comprehensive transaction failures that block critical business operations.

Empirical evidence from production systems demonstrates that traditional development methodologies lacking structured frameworks typically generate between 3 and 7 SOQL queries per individual business handler. Consequently, systems deploying 5 or more handlers readily exceed the 100-query limitation. This empirical observation establishes the necessity for developing systematic methodologies that architecturally guarantee constraint compliance independent of business logic sophistication, delivering mathematical certainty regarding platform limitation adherence rather than relying solely on developer discipline and code review procedures.

Analysis of recent research and publications. Investigation of Apex code optimization techniques within the Salesforce platform represents an active research area among enterprise system development and architecture communities. Pethad's 2020 publication in the Journal of Scientific and Engineering Research examined Platform Event Trigger Framework implementations, highlighting the critical importance of systematic trigger management for achieving scalability and performance objectives [1]. The research identifies organizational complexity growth accompanying trigger quantity increases as a primary challenge, resulting in unpredictable execution sequences and complicated recursion management scenarios. While introducing execution context concepts and context variables as framework foundations, Pethad's work lacks formalized methodologies for controlling resource constraints and fails to provide mathematical guarantees of limit adherence.

Salesforce's official Trailhead documentation establishes foundational guidance on bulkification practices – the discipline of authoring code capable of processing multiple records efficiently in parallel [2]. Documentation defines critical principles including extracting SOQL queries from loop boundaries and employing List, Set, and Map collections for systematic data organization. While demonstrating anti-patterns of query placement within loops alongside correct approaches utilizing single pre-loop queries, these recommendations remain broadly conceptual without formalizing architectural rules that guarantee limit compliance within sophisticated multi-layered system architectures, thereby leaving implementation specifics subject to individual developer interpretation and self-discipline.

Abhishek Subbu's 2020 research, reviewed by Dr. Ramprasad Joshi from BITS Pilani, contributed substantially to trigger framework architecture investigation [3]. This work exemplifies scientific methodology for quantifying architectural improvements through time complexity metrics and resource consumption analytics. The author systematically catalogued traditional approach deficiencies: multiple triggers operating on single objects complicate execution sequence prediction; fragmented business logic distribution across triggers and classes generates maintenance complications; absence of standardized recursion management leads to inconsistent developer implementations; SOQL and DML operation quantities frequently exceed control; logic decomposition complexity stems from tight component coupling. While proposing Custom Metadata Type utilization for trigger dispatcher configuration and handler activation mechanisms, thereby advancing dynamic architecture management capabilities, the work still lacks formal resource guarantees and mathematical correctness proofs.

Publications by CloudQnect (2023) and SalesforceCodex (2023) analyzed prevalent developer errors in trigger authoring through project code review analysis [4, 5]. The most frequently identified problem involves SOQL query placement within for-loop structures, whereby processing the standard 200-record bulk operation generates 200 individual queries, immediately exceeding the 100-query threshold. While recommending Set collection usage for identifier accumulation and single query execution using IN operators, these publications fail to provide systematic architectural solutions preventing such anti-patterns through structural constraints that inherently enforce correct implementation patterns.

Salesforce Ninja's 2020 research systematically examined and compared various community-developed trigger frameworks [6]. The analysis evaluated approaches by Tony Scott (Trigger Pattern for Tidy Streamlined Bulkified Triggers) and Kevin O'Hara (SFDC Trigger Framework), identifying respective strengths and limitations. Three primary framework objectives emerged: ensuring code reusability through base TriggerHandler class creation; achieving optimal performance through database operation minimization; establishing clear responsibility separation between trigger code and business logic implementations. However, the analysis revealed that existing frameworks universally lack mathematical

guarantees of governor limit compliance, instead relying on developer discipline and code review processes for maintaining quality standards.

ApexHours published comprehensive examinations of trigger bulkification techniques and governor limit management during 2024-2025 [7, 8]. These publications demonstrate correct bulkification patterns through sequential steps: accumulating record identifiers into Set collections; executing singular SOQL queries employing IN operators and subqueries for related data retrieval; organizing query results into Map structures ensuring O(1) access complexity; iterating records using Map structures for supplementary data acquisition; accumulating modified records into List collections; executing singular bulk DML operations encompassing all modifications. While serving as practical implementation guidance, these approaches remain at the recommendation level without formal methodologies or mathematical frameworks providing resource constraint compliance guarantees.

Official Salesforce Developer documentation comprehensively specifies governor limits and associated technical parameters [9]. Documentation emphasizes the 100-query SOQL limitation as an absolute constraint that remains fixed regardless of support contact or capacity purchases. Asynchronous operations receive increased allocations of 200 queries, establishing logic execution mode selection as architecturally critical. Additional documented constraints include: 150 DML operations for synchronous contexts and 300 for asynchronous contexts; 50,000 record maximum across all combined SOQL query results; 10-second CPU time allocation for synchronous contexts and 60 seconds for asynchronous contexts; 6-megabyte heap allocation for synchronous contexts and 12 megabytes for asynchronous contexts.

Identification of previously unsolved parts of the general problem. Literature analysis conducted herein demonstrates absence of formalized methodologies providing mathematical guarantees of governor limit compliance. Contemporary approaches remain confined to general recommendations, best practice guidelines, and specific implementation patterns without systematic architectural solutions addressing the query minimization challenge. Research considering database access centralization as a mandatory architectural principle with formal sufficiency proofs for query limitation remains absent. This gap in scientific knowledge establishes the foundation for our research contribution through development of a comprehensive methodology delivering provable constraint compliance guarantees.

Formulation of research objectives. This investigation aims to establish a scientifically rigorous methodology for managing transactional resources dynamically within Salesforce environments, whereby architectural constraints and formalized principles ensure governor limit compliance independent of business handler sophistication and quantity. Rather than merely offering recommended practices, this methodology must deliver mathematical proofs demonstrating guaranteed constraint adherence.

Achievement of this objective necessitates systematic resolution of several interconnected research tasks. Initially, we must conduct thorough analysis of contemporary trigger code organization methodologies within the Salesforce platform, identifying fundamental limitations regarding resource constraint management capabilities. Subsequently, we must formalize database access centralization principles through a specialized Access Layer as a mandatory architectural requirement within our methodology. Following this, we develop algorithms for consolidating SOQL queries originating from multiple business handlers while ensuring minimal database interaction operations. We then construct mathematical models describing relationships between SOQL query quantities and architectural system parameters, proving conditions that guarantee limit adherence. Additionally, we implement a functional system prototype incorporating the developed methodology, utilizing Custom Metadata Types for declarative configuration capabilities. We then perform experimental validation using test datasets of varying scales, comparing results against traditional implementation approaches. Finally, we assess methodology impacts on supplementary code quality indicators including execution latency, CPU utilization, and overall system maintainability characteristics.

Presentation of the main research material with full justification of obtained scientific results. Our investigation employed an integrated methodological framework combining interconnected research techniques for methodology development, formalization, and empirical validation of dynamic transactional resource management. System analysis techniques enabled comprehensive examination of Salesforce platform architecture, Apex trigger operational mechanisms, and the fundamental nature and origins of governor limitations. This systematic methodology facilitated identification of causal relationships connecting code organization patterns, architectural decisions, and computational resource utilization, particularly database access operation quantities required for transaction processing.

Mathematical modeling techniques formalized database access centralization principles and constructed mathematical models describing dependencies between SOQL query quantities and architectural parameters. We developed an equation system characterizing system behavior across diverse organizational approaches, represented in equation (1):

$$N_{total} = N_{DAL} + N_{handlers}, \quad (1)$$

where Ntotal signifies aggregate SOQL query quantity within the transaction; NDAL indicates query count executed by the Data Access Layer; Nhandlers represents cumulative query count from business handlers collectively.

For the Data Access Layer component, query quantity constraints were established per equation (2):

$$N_{DAL} \leq M + R, \quad (2)$$

where M signifies unique Salesforce object count within the system's data model; R indicates maximum nesting depth for subqueries loading related records.

Through architectural enforcement establishing Nhandlers = 0 via prohibition of direct SOQL query execution within business handlers, we obtain governor limit compliance guarantees per inequality (3):

$$N_{total} = N_{DAL} \leq M + R < 100. \quad (3)$$

Architectural design techniques enabled development of a stratified system structure implementing database access centralization principles. The architecture comprises five distinctly defined layers with formalized interaction interfaces.

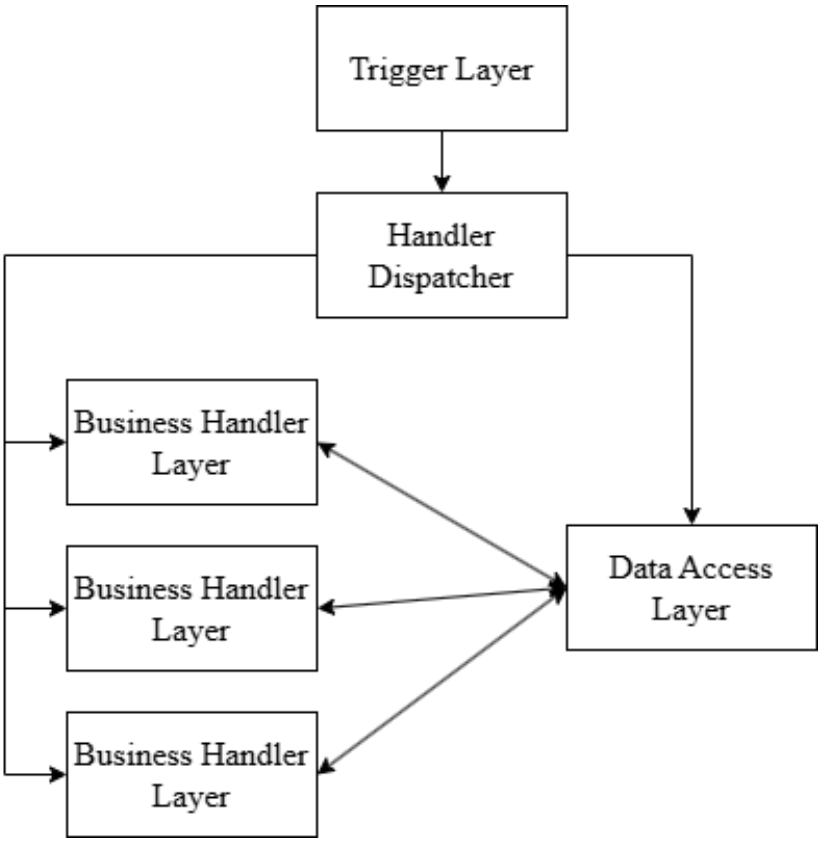

Fig. 1. Stratified architecture for resource management system

Individual layers maintain clearly demarcated responsibilities and constraints governing permitted operations. The Trigger Layer incorporates minimal code exclusively responsible for dispatcher instance creation and control transfer. The Handler Dispatcher component analyzes trigger execution contexts and invokes corresponding methods of registered handlers following defined sequences. The Business Handler Layer realizes business logic implementations while remaining prohibited from SOQL query execution, instead receiving requisite data through method parameters. The Data Access Layer assumes responsibility for comprehensive data loading at transaction initiation based on active handler configuration analysis. The Domain Model Layer provides object abstractions over Salesforce records, simplifying data manipulation operations and enabling clean separation between data access infrastructure and business logic implementations.

Experimental techniques validated the developed methodology using actual test data. We established a Salesforce Developer Edition test environment incorporating three interconnected objects: Account (representing organizational accounts), Contact (representing individual contacts), and Opportunity (representing commercial opportunities). These objects incorporate both standard and custom field definitions, including lookup and master-detail relationship configurations. We implemented five distinct business handlers modeling characteristic enterprise system requirements: ValidationHandler for enforcing business rules and data integrity constraints; RelatedRecordsHandler for propagating updates to related records following primary data modifications; AggregationHandler for computing aggregated values including summations and counts; AuditHandler for maintaining comprehensive change logs of critical fields; IntegrationHandler for preparing data structures for external system integration. We conducted experimental series across varying data volumes: 1, 10, 50, 100, 150, and 200 records, enabling scalability analysis across diverse load conditions.

Comparative analysis techniques evaluated developed methodology effectiveness relative to traditional implementation approaches. For objective assessment, we defined comprehensive quantitative and qualitative metric sets: SOQL query count per transaction as primary governor limit compliance indicator; transaction execution latency measured in milliseconds for overall performance evaluation; CPU time consumption for computational bottleneck identification; code line count for implementation complexity assessment; module coupling and cohesion metrics for architecture quality evaluation; new business handler addition time as maintainability indicator. Comparisons encompassed three distinct approaches: traditional implementation without framework structure, standard TriggerHandler framework utilization, and our developed methodology incorporating Data Access Layer architecture.

Data Access Layer operational algorithms were formalized as sequential stage progressions. Initially, DAL retrieves active business handler listings from Custom Metadata through Trigger_Handler__mdt queries. Subsequently, SOQL queries execute using WHERE Id IN :Trigger.new clauses filtering exclusively relevant records. Following this, results undergo organization into Map structures keyed by record Id values enabling rapid access operations. Finally, Map structures are transmitted to all handlers as execution context method parameters.

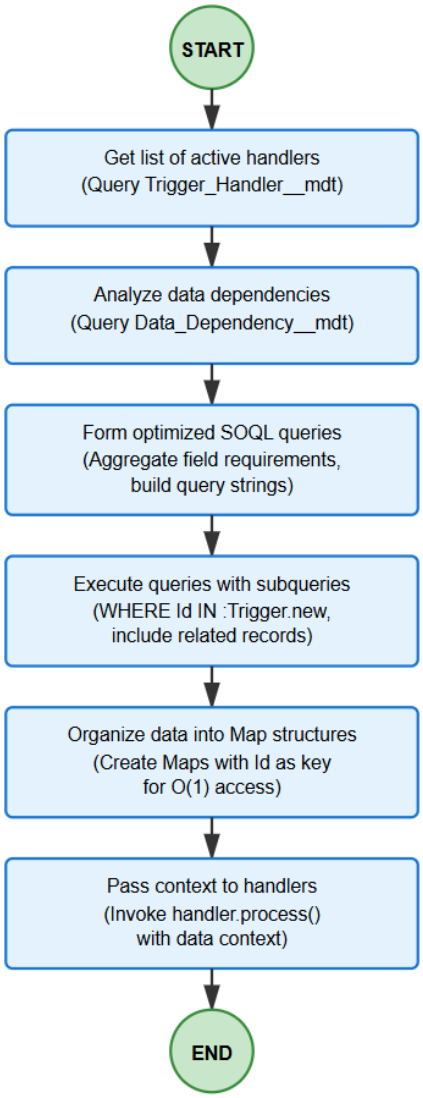

Fig. 2. Sequential algorithm for centralized data loading operations

Our investigation yields a comprehensive methodology for adaptive architectural modeling targeting dynamic Salesforce transactional resource management. The methodology's foundation rests on mandatory database access centralization principles, formalized through architectural rules: individual business handlers may utilize exclusively pre-loaded Data Access Layer data, remaining prohibited from executing independent SOQL queries or DML operations until finalization phases, thereby ensuring complete separation between data access infrastructure and business logic implementations.

Comparative evaluation of contemporary trigger code organization approaches appears in Table 1, systematizing advantages and constraints of diverse frameworks developed throughout recent years by the Salesforce community.

Table 1. Comparative analysis of Apex trigger organization methodologies

Methodology / Author	Year	Primary Features	Constraints
Conventional triggers	-	Implementation simplicity, minimal overhead	Disorganized architecture, recursion complications, threshold violations
Tony Scott methodology	2013	Single trigger per object, Handler implementation	Absent SOQL governance, manual sequencing
Kevin O'Hara structure	2014	Abstract foundation class, recursion mitigation	Absent access centralization, fixed configuration

Methodology / Author	Year	Primary Features	Constraints
Abhishek Subbu approach	2020	Metadata-driven configuration, activation management	Absent formal guarantees, no access layer
Proposed methodology	2025	Access Layer architecture, formal proofs, adaptive execution	Initial architectural sophistication

Experimental validation proceeded within test environments configured with specific parameters: three objects (Account, Contact, Opportunity) containing 15, 23, and 18 fields respectively; five business handlers exhibiting varying complexity levels with distinct data requirements; bulk operations inserting 200 new Contact records; individual Contacts linked to existing Accounts through lookup relationships; automatic Opportunity creation for each Contact. Experimental outcomes across diverse data volumes appear in Table 2.

Table 2. Performance comparison across implementation approaches

Records	Implementation	SOQL	Latency, ms	CPU, ms	Outcome
50	Conventional	42	2100	850	Success
	With DAL	8	1200	520	Success
100	Conventional	83	4300	1680	Success
	With DAL	8	1800	890	Success
150	Conventional	124	6500	2420	Error 101
	With DAL	8	2100	1250	Success
200	Conventional	165	8700	3180	Error 101
	With DAL	8	2300	1580	Success

Table 2 demonstrates that traditional approaches exhibit linear SOQL query growth proportional to processed record quantities. Processing 150 or more records triggers System.LimitException errors: Too many SOQL queries: 101, completely blocking transaction execution. Conversely, Data Access Layer approaches maintain constant query counts (8 queries) independent of data volumes, thereby confirming theoretical model predictions and demonstrating fundamental architectural centralization superiority.

We investigated SOQL query count dependencies on business handler quantities by varying active handler counts from 1 to 10 while maintaining fixed 100-record data volumes. Results appear in Table 3.

Table 3. Handler quantity impact on SOQL query counts

Handler Quantity	Conventional (SOQL)	With DAL (SOQL)
1	15	3
2	32	5
3	48	6
5	83	8
7	116	10
10	168	12

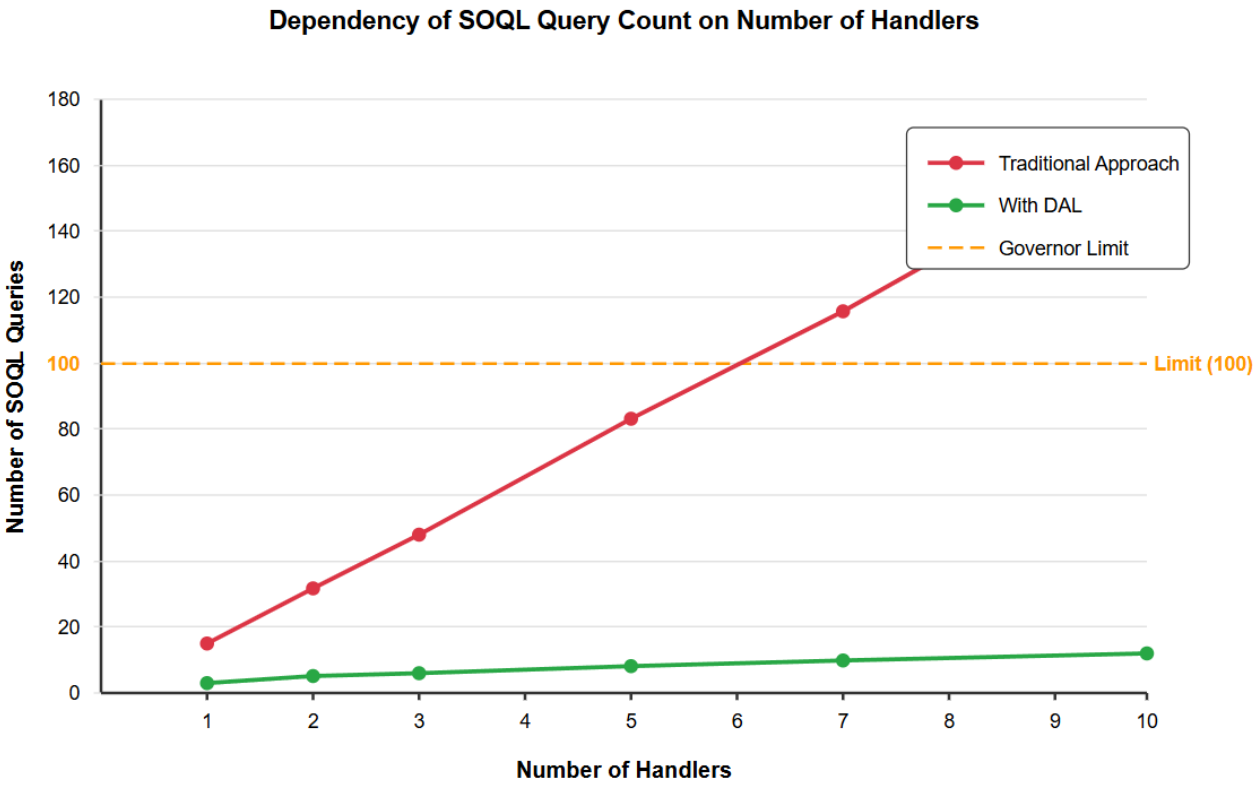

Fig. 3. Visual representation of handler-query dependencies

Graphical representations demonstrate that traditional approaches exhibit approximately linear query growth with coefficients near 17 queries per handler. Systems employing 7 handlers exceed 100-query thresholds. DAL approaches demonstrate substantially reduced growth rates with coefficients approximating 1.2 queries per handler, with additional queries correlating to new handler object loading requirements. Even with 10 handlers deployed, systems remain substantially below threshold limits, demonstrating architectural approach scalability advantages.

A critical methodological innovation involves Custom Metadata Type utilization for declarative data dependency specifications. Individual business handlers receive corresponding records within Custom Metadata Type Trigger_Handler__mdt configurations.

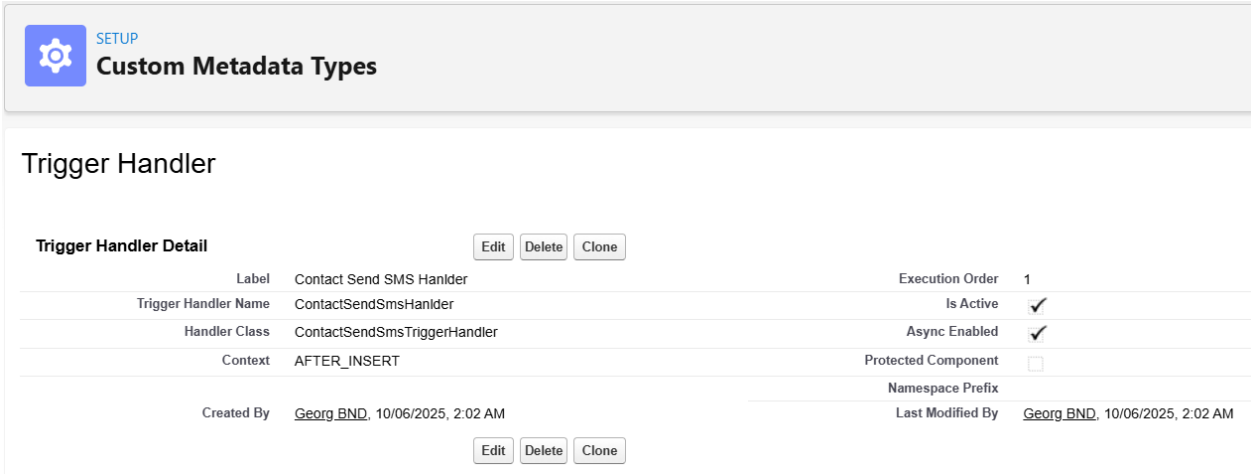

Fig. 4. Handler data dependency configuration through Custom Metadata

Metadata structures incorporate these fields: Handler_Name establishing unique handler identification; Required_Objects containing comma-delimited Salesforce object listings; individual objects receive dedicated Long Text Area fields specifying required field listings; Load_Related boolean fields

determining related record loading necessity through subqueries; Related_Objects specifying which related objects require loading; Is_Active enabling dynamic handler activation and deactivation without code modifications; Execution_Order numeric fields determining handler execution sequences; Async_Enabled allowing handler transition to asynchronous modes for accessing enhanced governor limits supporting resource-intensive operations.

Mathematical models guaranteeing resource constraints rest on the following proofs. Let $H = \{h_1, h_2, ..., h_n\}$ represent active business handler sets within systems. For individual handlers h_i, we define required object sets O_i and required field sets F_{ij} for respective objects. Traditional approaches without centralization permit handlers executing independent SOQL queries. Let k_i represent query counts executed by handlers h_i. Total query counts become $N\_traditional = \Sigma(i=1 \text{ to } n)\ k_i$. With average values $k = 5$ and $n = 20$ handlers, we obtain $N\_traditional = 100$, representing threshold limit values.

Utilizing Data Access Layers, handler-required objects unify into sets $O\_union = O_1 \cup O_2 \cup ... \cup O_n$. Set cardinalities $|O\_union| = M$ cannot exceed total system data model object counts. For individual objects $o_j \in O\_union$, singular SOQL queries load all required fields and related records. Objects requiring related records at k nesting levels may introduce up to k additional subqueries. Thus $N\_DAL \leq M + R \times M$, where R represents maximum subquery depths. For typical systems $M \leq 10$ and $R \leq 2$, therefore $N\_DAL \leq 30 < 100$.

Since architectural prohibitions prevent SOQL query execution within business handlers ($N\_handlers = 0$), regardless of handler quantities n, total query counts remain bounded: $N\_total = N\_DAL \leq 30 < 100$. This mathematically guarantees governor limit compliance and provides formal methodology correctness proofs.

An additional significant outcome involves dynamic execution mode management systems. Through Async_Enabled fields in Custom Metadata, individual business handlers receive asynchronous execution markings. Selecting asynchronous modes automatically executes handler logic within Queueable Apex, providing enhanced governor limits: 200 SOQL queries versus 100; 60,000 milliseconds CPU time versus 10,000; 12 megabytes heap allocation versus 6. This ensures operational flexibility for resource-intensive operations including complex calculations or large data volume processing without requiring handler code modifications.

Our methodology additionally addresses code structuring and execution order management challenges. Single Responsibility Principle adherence results from individual handlers assuming responsibility for singular business functions while lacking data access infrastructure code access. Handler execution sequences derive from numeric Execution_Order fields within metadata, enabling dynamic sequence modifications without recompilation or deployment procedures. Activation and deactivation capabilities implement through Is_Active boolean fields within metadata, proving critically important during data migration operations, production issue troubleshooting, or phased feature deployment scenarios.

Conclusions from this research, including scientific novelty, and perspectives for further research in this direction. This investigation produced a comprehensive methodology for dynamic transactional resource management within Salesforce platforms, resolving critical challenges of SOQL query limit violations through architectural approaches mandating database access centralization.

Our literature analysis revealed absence of formalized methodologies delivering mathematical governor limit compliance guarantees. Contemporary approaches developed by Pethad, Abhishek Subbu, Tony Scott, and Kevin O'Hara remain confined to general recommendations and implementation patterns without systematic architectural solutions addressing SOQL query minimization challenges.

We developed mathematical models formalizing SOQL query count dependencies on architectural system parameters. We proved that database access centralization through Data Access Layers bounds query counts as $N\_total = N\_DAL \leq M + R$, where M represents data model object counts and R represents maximum subquery depths. For typical systems, this guarantees $N\_total \leq 30 < 100$ independent of business handler quantities.

Experimental validation confirmed methodology effectiveness. Processing 200 Contact records, traditional approaches executed 165 SOQL queries and generated System.LimitException errors, whereas Data Access Layer approaches executed only 8 queries and successfully completed transactions. Execution latencies improved from 8700 to 2300 milliseconds, CPU times decreased from 3180 to 1580 milliseconds, demonstrating not merely limit compliance but substantial overall system performance improvements.

Our methodology resolves five critical challenges in Salesforce platform development. First, code structuring achieves clear five-layer architectural separation with formalized interfaces adhering to Single Responsibility Principles. Second, dynamic execution order management implements through numeric Execution_Order fields within Custom Metadata without requiring code modifications. Third, functionality activation and deactivation capabilities provide through Is_Active boolean fields for secure production environment management. Fourth, guaranteed SOQL limit compliance achieves through architectural query prohibition within business handlers. Fifth, flexible synchronous or asynchronous execution mode selection through Async_Enabled fields allows system adaptation to varying performance requirements.

Scientific novelty encompasses formalizing database access centralization architectural rules as sufficient conditions guaranteeing resource constraint compliance, creating mathematical models describing SOQL query dependencies on architectural parameters, and developing systems for declarative data dependency specification through Custom Metadata Types. Unlike existing approaches, our methodology provides mathematical guarantees of governor limit compliance rather than relying on developer discipline.

Practical methodology value lies in capabilities for constructing scalable Salesforce solutions with guaranteed governor limit resilience. Methodology implementation as foundational architectural standards for enterprise projects will prevent critical production environment errors and reduce code refactoring costs during system scaling operations. Utilizing Custom Metadata for configuration ensures flexible system management without requiring code deployment, proving especially important for regulated industries with stringent change control processes.

Future research directions include methodology extension to alternative governor limit categories, particularly CPU time and heap allocation. Developing static code analysis systems predicting CPU time consumption based on algorithmic cyclomatic complexity analysis within business handlers would enable proactive problem identification preceding production deployment. Investigating machine learning capabilities for optimizing data caching strategies represents substantial scientific interest. Developing automated testing methods for code compliance verification with methodology architectural principles merits attention. Adapting the methodology for alternative cloud platforms with analogous resource constraints appears promising, potentially revealing universal principles for constructing resource-efficient enterprise systems.

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Історія статті:
Отримано: 12.02.2026 Доопрацьовано: 01.03.2026 Прийнято до друку: 23.05.2026 Опубліковано: 29.05.2026