HandsMen Threads – Salesforce CRM Project Documentation & Implementation Guide

1. PROJECT OVERVIEW

HandsMen Threads is a men's fashion brand focused on sophistication and premium customer experience. To support its operations, Salesforce CRM is used to streamline customer data, manage products, handle orders, monitor inventory, automate loyalty programs, and ensure timely communication through system-generated email alerts.

This CRM project includes Salesforce configuration, automation, Lightning Web Component UI modules, Apex triggers, batch processing, and email notification templates to deliver an integrated and efficient business system.

2. OBJECTIVES

The primary objective of this Salesforce CRM is to create a unified system that allows HandsMen Threads to:

- Manage customer information and loyalty status.
- Process orders efficiently and automatically notify customers.
- Track product details and stock availability in real time.
- Automate loyalty program upgrades based on total purchases.
- Notify staff when inventory levels are low.
- Maintain clean, accurate business data through automation and validation.

This ensures improved sales efficiency, reduced manual work, and an enhanced customer experience.

3. PHASE 1 – REQUIREMENT ANALYSIS & PLANNING

Understanding Business Requirements

HandsMen Threads required a Salesforce system that could:

- Manage customer information, purchases, and loyalty levels
- Record orders and link them to products and customers

- Monitor inventory stock levels
- Notify internal teams and customers automatically
- Provide reporting and dashboards for performance analytics

Project Scope

- Build custom objects for Customers, Products, Orders, and Inventory
- Build automated flows for order confirmation, loyalty program, and low stock alerts
- Implement Apex triggers and batch jobs for advanced automation
- Design email alerts for customers and internal staff
- Create LWCs for UI navigation and access to the system modules

Data Model & Relationships

- **HandsMen Customer → HandsMen Order** (Lookup Relationship)
- **HandsMen Product → HandsMen Order** (Lookup Relationship)
- **Products → Inventory** (Master-Detail or Lookup depending on design)

Stakeholder Mapping

- **Sales Team** – manages customers and orders
- **Inventory Team** – monitors stock and product availability
- **Marketing Team** – runs campaigns and promotions
- **Management** – monitors dashboards and reports

Execution Roadmap

1. Build custom objects & fields
2. Configure flows and automation
3. Implement Apex logic
4. Create UI (LWC Modules)
5. Perform testing and validation
6. Deploy to production

4. PHASE 2 – SALESFORCE DEVELOPMENT (BACKEND & CONFIGURATIONS)

Custom Objects & Fields

HandsMen Customer

Fields created:

- Customer Name
- First Name
- Last Name
- Phone
- Loyalty Status (Formula or automated field)
- Total Purchases

HandsMen Order

Fields created:

- Order Name
- HandsMen Product (Lookup)
- HandsMen Customer (Lookup)
- Quantity
- Total Amount
- Order Number
- Customer Email
- Status (Confirmed, Pending, Canceled, etc.)

Automation (Flows)

✓ **Order Confirmation Flow**

- Trigger: When HandsMen Order status = **Confirmed**
- Action: Send an email to the customer

- Email Message:
  "Your order has been confirmed!"

✓ **Low Stock Flow**

- Trigger: When **Stock Quantity < 5**
- Action: Send an email alert to internal inventory team
- Purpose: Prevent stockouts

✓ **Loyalty Program Flow**

Decision element:

- If *Total Purchases > 1000* → Loyalty Status = **Gold**
- If *Total Purchases ≤ 500* → Loyalty Status = **Bronze**
- Else → Loyalty Status = **Silver**

Apex Classes, Triggers, and Batch Jobs

To support automation beyond flows:

Triggers Created

- **Order Total Trigger** – Calculates total order amount
- **Stock Deduction Trigger** – Deducts stock when an order is created
- **Loyalty Update Trigger** – Updates customer totals

Batch Job

- **Inventory Batch Job –** Processes and updates inventory levels in bulk

5. PHASE 3 – UI/UX DEVELOPMENT & CUSTOMIZATION

Lightning Web Components (LWC) App

A custom LWC application was created, containing the following modules:

- HandsMen Customer
- HandsMen Orders
- HandsMen Products

- Marketing Campaigns
- Reports
- Dashboards
- Inventory
- Accounts & Contacts

Page Layouts and Dynamic Forms

Each object includes:

- Clean layout for data entry
- Conditional visibility for fields
- Related lists for orders and inventory

Reports & Dashboards

Salesforce reports were created to monitor:

- Total orders
- Customer loyalty distribution
- Product availability
- Sales analytics

6. PHASE 4 – DATA MIGRATION, TESTING & SECURITY

Data Migration

- Import Products
- Import Customers
- Import Inventory Levels

Tools used: **Data Import Wizard** or **Data Loader**

Security Model

- Profiles for Sales, Inventory, and Admin
- Permission Sets for extended access
- Field-level security for sensitive data

- Role hierarchy to control record visibility

Testing Approach

Tested all features including:

- Order creation
- Email confirmation triggers
- Loyalty flow
- Low-stock notification
- Product creation and stock updates
- Inventory batch job execution

Each test case includes:

- Input values
- Output/results
- (You can later add screenshots here)

7. PHASE 5 – DEPLOYMENT, DOCUMENTATION & MAINTENANCE

Deployment Strategy

- Moved components using **Change Sets**
- Validated in sandbox before production deployment

Maintenance

- Regular monitoring of flows and triggers
- Batch job scheduling review
- Periodic data cleanup
- Enhancements based on business feedback

Troubleshooting Approach

- Debug logs for Apex
- Flow error email alerts
- Validation testing for new releases

8. **CONCLUSION**

This Salesforce CRM project for HandsMen Threads successfully integrates customer management, order automation, product tracking, inventory monitoring, and loyalty program management. With custom objects, flows, Apex automation, and a modern LWC interface, the system provides a seamless experience for both customers and internal teams.

It ensures accurate data, faster processing, and strong visibility across business operations — making Salesforce a central tool in the company's continued growth and client satisfaction.

Guidelines for Salesforce Project Demo Video Presentation

1. **Introduction**

- Introduce yourself and state the project name: **HandsMen Threads – Salesforce CRM System**.
- Briefly explain the business purpose: HandsMen Threads uses Salesforce to manage customers, orders, products, inventory, loyalty programs, and automated notifications.
- Mention the tools used: Salesforce CRM, Lightning App Builder, Flows, Apex, Batch Jobs, Email Templates, LWC.

2. **App Overview**

- Show the custom **HandsMen Threads App** in the App Launcher.
- Highlight the custom modules included:
    - HandsMen Customer
    - HandsMen Orders
    - HandsMen Products
    - Inventory
    - Marketing Campaigns
    - Reports
    - Dashboards
    - Accounts & Contacts

- Mention that the app was also enhanced using **Lightning Web Components** for better UI navigation.

3. **User Interface Demonstration**

- Demonstrate how to create a new **HandsMen Customer** record: Show fields like First Name, Last Name, Phone, Loyalty Status, Total Purchases.
- Demonstrate how to create a **HandsMen Order**: Show fields such as Product, Customer, Quantity, Total Amount, Status, Customer Email, and Order Number.
- Create or show a **HandsMen Product** and verify stock quantity in real time.
- Explain the dynamic behavior or validations used (if applicable).

4. **Business Process Automation**

- Show the **Order Confirmation Flow** that sends an email when order status = "Confirmed."
- Demonstrate the **Low Stock Flow**, which sends an alert when stock quantity < 5.
- Explain the **Loyalty Program Flow**, including the Decision logic:
  - 1000 = Gold
  - ≤500 = Bronze
  - Otherwise = Silver
- Open and briefly show the Apex Triggers:
  - Order Total Calculation
  - Stock Deduction
  - Loyalty Update (if applicable)
- Show the **Inventory Batch Job** and explain what it processes.

5. **Reports & Dashboards**

- Present the dashboards created for:
  - Customer loyalty levels

    - Product stock status
    - Total orders and sales summaries
- Show any custom reports used to monitor transactions or product performance.

6. **<u>User Management & Security</u>**
    - Briefly show the Profiles used (Sales, Inventory, Admin).
    - Show Permission Sets (if any).
    - Mention field-level security for sensitive fields (e.g., Loyalty Status, Total Purchases).
    - Explain how access is controlled for different team members.

7. **<u>Error Handling & Debugging</u>**
    - Demonstrate how you use debug logs to troubleshoot Apex issues.
    - Show flow error emails or how errors are handled during automation.

8. **<u>Highlights</u>**
    - Point out key custom features unique to the project:
        - Automated Loyalty Program
        - Low Stock Alerts
        - Real-time stock deduction
        - Inventory Batch Job
        - LWC-based app navigation
        - Email notifications for customers

9. **<u>Conclusion</u>**
    - Summarize the completed features.
    - Mention that the app is fully functional, tested, and ready for use.
    - Thank the viewer for watching.

Pro Tips for Project Demo Video

1. **Use Your Own Voice**
   - Speak clearly and confidently while explaining each feature shown in the demo.
   - Voice-over is important to demonstrate your understanding of the system.
2. **Keep the Demo Within 5–10 Minutes**
   - Be concise and focus only on the essential features.
   - Avoid long pauses, unnecessary clicking, or navigating slowly.
3. **Prepare Before Recording**
   - Rehearse the entire flow of your demo.
   - Have test records, flows, products, customers, and orders ready.
4. **Ensure Clear Screen Resolution**
   - Record in **HD (720p or higher)** so all fields and labels are visible.
   - Avoid blurry or low-resolution screens.
5. **Minimize Background Noise**
   - Record in a quiet environment.
   - Use a good microphone or headset for clean audio.
6. **Navigate Smoothly**
   - Move your mouse slowly and deliberately.
   - Don't rush when opening tabs or flows.
7. **Use Bookmarks or Pre-Opened Tabs**
   - Keep all essential pages opened:
     - HandsMen Customer
     - HandsMen Products
     - HandsMen Orders

        - Flows
        - Triggers
        - Dashboards
    - This avoids delays caused by loading time.

8. **Follow a Logical Flow**

   Present your demo in this order:

    - Introduction
    - App Overview
    - UI Demonstration
    - Automations (Flows + Triggers)
    - Reports & Dashboards
    - Security
    - Highlights
    - Conclusion

9. **Use Realistic Examples**
    - Create actual sample customers, products, and orders.
    - Show email notifications, loyalty changes, and stock deduction in action.

10. **Showcase Unique Features**
    - Low Stock Flow
    - Loyalty Program Automation
    - Order Confirmation Email
    - Inventory Batch Job
    - LWC application layout
    - Real-time stock updates

11. **End with a Confident Summary**
    - Briefly restate what you built and why it benefits the business.
    - Thank the viewers for watching.

12. **Use Reliable Recording Tools**
    - Recommended: **OBS Studio**, **Loom**, **Google Meet**, or **Zoom**.
    - Ensure the recording is stable and not lagging.
13. **Save and Share Properly**
    - Export the video in MP4 format.
    - Upload to Google Drive, YouTube (Unlisted), or the platform requested by your mentor.