Salesforce CRM Implementation
Project Documentation

HandsMen Threads:
Elevating the Art of Sophistication in Men's Fashion

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HandsMen Threads: Elevating the Art of Sophistication in Men's Fashion

Project Overview:

HandsMen Threads, an emerging leader in the men's fashion industry, initiated a Salesforce CRM implementation to streamline its data architecture and optimize customer relationship management. The aim was to build an end-to-end automated platform that supports order processing, customer engagement, inventory management, and targeted marketing. By digitizing key business operations and ensuring real-time insights, the CRM project supports the organization's vision of offering refined and responsive service.

Key Features Include:

- Real-time inventory monitoring with stock alerts.
- Automated customer communication via email templates.
- Role-based data access and permissions.
- Dynamic loyalty program with scheduled updates.
- Integrated dashboards and reports for business insights.

Objectives:

The CRM system was implemented with a focus on centralizing business data, automating communication workflows, and enabling smarter decision-making. It intends to resolve existing challenges such as fragmented customer records, lack of stock visibility, and minimal loyalty engagement.

The objectives of this implementation are:

- To improve the speed and accuracy of order processing.
- To ensure data integrity across custom objects.
- To automate repetitive tasks like email notifications.
- To maintain visibility and control over product inventory.
- To support personalized marketing efforts and customer rewards.

Phase 1: Requirement Analysis & Planning:

➢ Understanding Business Requirements:

The primary requirement of the HandsMen Threads CRM implementation was to streamline and automate the end-to-end ordering and inventory management process. The manual methods previously used were prone to delays and errors, particularly in areas such as stock updates, customer communication, and order confirmation tracking. Additionally, there was a need for improved visibility into product availability and customer engagement.

The business needed a centralized system that could:

- Record and manage customer orders.
- Automatically update inventory quantities.
- Send real-time email notifications for low stock alerts and order confirmations.
- Provide a loyalty email system based on customer activity.
- Generate dashboards and reports for business analysis.

This CRM system was envisioned to empower sales teams, ensure stock accuracy, and offer a more responsive customer experience.

➢ Defining Project Scope and Objectives:

The project scope was clearly outlined to cover both backend automation and frontend usability. The CRM was designed not only for internal tracking and operational efficiency but also to strengthen customer communication workflows.

Key objectives included:

- Develop a custom HandsMen Orders object to capture customer orders, including quantity and product references.
- Create an Inventory object with stock tracking capabilities.
- Implement triggers and flows to automatically deduct stock upon order placement.
- Enable email alerts for order confirmations, low stock, and loyalty follow-ups.
- Provide a dashboard and reports for monitoring sales.
- Define security roles for Sales Reps, Inventory Managers, and Admins with tailored access.

By the end of the planning phase, all necessary relationships, automation points, and security considerations were identified and mapped.

➢ Data Model and Security Model Design

A robust data model was planned to reflect real-world entities and their relationships. The schema included custom objects with clearly defined relationships and automation logic.

- Key Elements of the Data Model:
  - HandsMen Orders (Custom Object):
    - Fields: Product (Lookup), Quantity (Number), Order Date, Status.
    - Relationship: Lookup to HandsMen Products.
  - Inventory (Custom Object):
    - Fields: Available Quantity, Reorder Level.
    - Master-detail relationship with HandsMen Products.
  - HandsMen Products (Custom Object):
    - Fields: Product Name, Category, SKU, Unit Price.

Along with these custom objects, **HandsMen Customers** and **Marketing Campaigns** were also incorporated to complete the customer and marketing workflow.

Trigger logic was incorporated to deduct inventory when a new order is created, and automated flows were used to generate emails based on conditions like stock falling below a threshold.

- Data Security Model:

  To ensure proper access control and data integrity, a layered security model was designed:

  - Profiles & Roles:
    - Sales Managers
    - Inventory Managers
    - Marketing Managers
  - Permission Sets: Provided additional access (e.g., to reports or dashboards) without changing profiles.
  - Role Hierarchy: Structured to allow visibility for managers without compromising lower-level restrictions.
  - Sharing Rules: Applied to make certain records visible to specific groups when required.

  All relationships and logic were reviewed collaboratively with stakeholders to ensure alignment with actual business workflows and scalability for future growth.

Phase 2: Salesforce Development - Backend & Configurations

This phase involved the backend setup and configurations required to implement the defined business logic within Salesforce. Focus was given to customizing the platform using declarative tools and Apex code where necessary.

➢ Environment Setup and DevOps Workflow

The development environment was set up directly within Salesforce using the standard Developer Console. Object customizations, automation, and Apex logic were implemented and tested within the same org. While versioning was manual, careful documentation and backups of components were maintained throughout the phase.

➢ Object Customization and Field Configuration

Key custom objects such as HandsMen Orders, Inventory, and HandsMen Products were configured with appropriate fields, lookup and master-detail relationships to ensure smooth data flow and integrity. Page layouts were customized to match user roles, and field-level security was applied to restrict or permit access based on user responsibilities.

➢ Validation Rules and Automation

- ❖ Basic validation logic was enforced using Validation Rules, which included:
  - Ensuring correct email format in customer details.
  - Mandating customer name selection before order creation.

  Image 2.1 demonstrates a validation rule enforcing correct email format, while Image 2.2 shows automatic full name generation by combining first and last names to maintain data consistency.

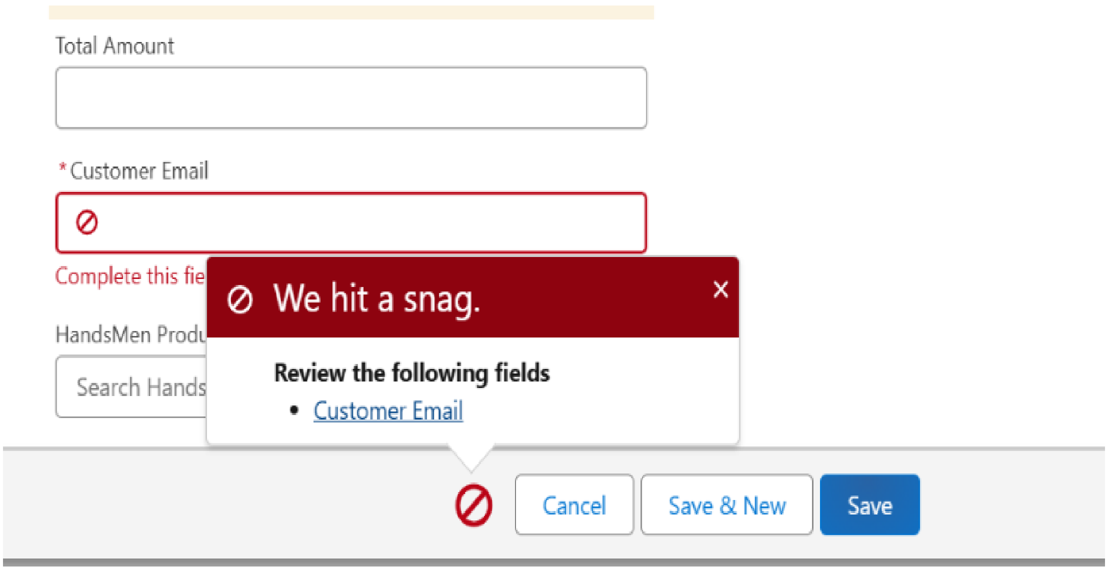


Fig 2.1

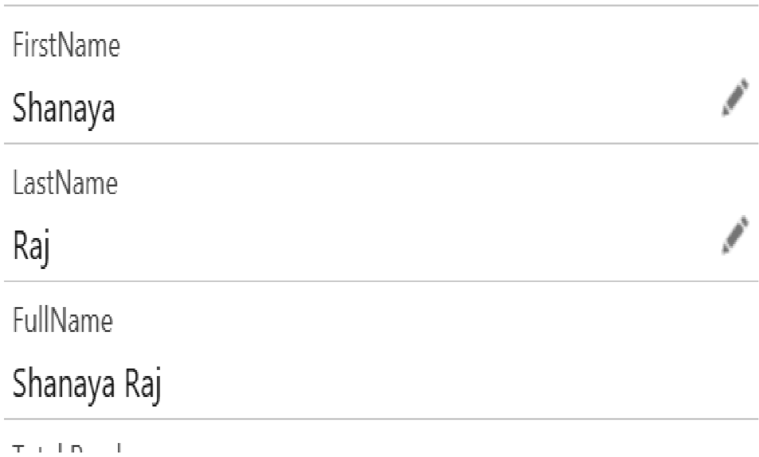


Fig 2.2

- Automation within the system was handled using Flows, specifically:
  - Alert Emails were triggered through flows when product inventory dropped below the reorder level.
  - Order Confirmation Emails were sent upon successful creation of a new order record.

  These flows minimized manual communication and ensured timely responses to key business events.

Apex Classes and Triggers

To manage logic beyond what declarative tools could handle:

- A custom Apex Trigger on the *HandsMen Orders* object was developed to reduce stock from inventory upon successful order placement.
- Queueable Apex was used to send loyalty program emails in batches to customers once their purchase milestones were met.
- All Apex logic was supported with test classes, achieving required code coverage for deployment.

Together, these backend developments ensured a responsive, automated, and efficient CRM system tailored to HandsMen Threads' business operations.

Phase 3:UI/UX Development & Customization

In this phase, the user interface and experience were carefully tailored to ensure that the **HandsMen Threads** Salesforce app was intuitive, role-specific, and aligned with each user's daily tasks. This included building a streamlined app, assigning users with clearly defined roles, and integrating reporting and dashboard components to deliver real-time business insights.

➢ Lightning App Setup: HandsMen Threads

The HandsMen Threads app was created using Lightning App Builder. It serves as the central workspace for sales, inventory, and marketing operations within the organization.

The app contains the following key tabs:

- HandsMen Orders – For placing and tracking customer orders.
- Inventory – To monitor available stock and trigger restock alerts.
- HandsMen Products – A master list of all available products.
- Customers – Database of customer profiles and contact details.
- Marketing Campaigns – To manage and track promotional initiatives.
- Reports – To generate and view sales-related analytics.
- Dashboards – To visualize business trends and performance metrics.

This structured layout allowed all relevant departments to access the modules essential to their functions while maintaining a clean and uncluttered user interface.

The following image (3.1) illustrates the configured setup as discussed in the above section.

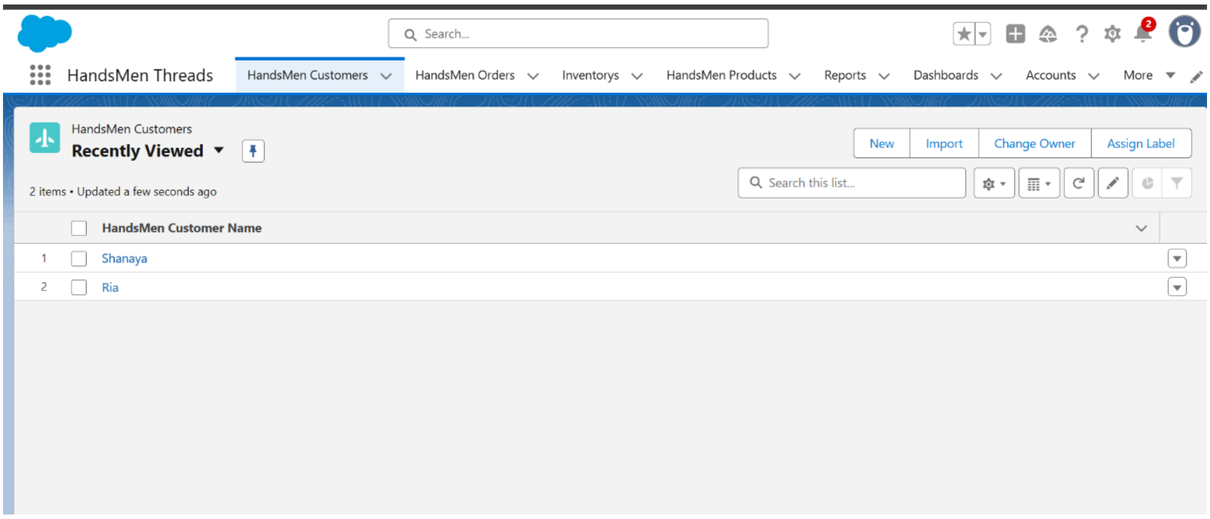


Fig 3.1

➢ User Management

User access was controlled via profiles and roles, ensuring users could only interact with the data relevant to their responsibilities:

- **Sales Manager** – Could view products and place orders.
- **Inventory Manager** – Managed product stock levels and handled restocking actions.
- **Marketing Manager** – Had access to customer details and campaign information.

Each role experienced a tailored interface within the app, with only the relevant tabs and data made visible to them.

➢ Reports

A custom report was developed on the **HandsMen Orders** object to allow sales and inventory teams to monitor order data efficiently. The report included filters and groupings for improved readability and insights:

- **Report Type:** Custom Report Type on HandsMen Orders
- **Filters Used:**
    - **Order Status** (e.g., Confirmed, Pending, Rejected)
    - **Order Date** (date range selection)
    - **Product** (to filter by product ordered)

This report provided a detailed overview of order trends, helping the sales team and managers track key metrics such as top-selling products and order frequency.

The report screenshot (3.2) below displays order statistics based on defined filters.

Report: HandsMen Orders
Orders by Status

Total Records 14 | Total Quantity 6,227 | Total Total Amount 53,425

Status ↑	HandsMen Order: Owner Name	Customer	HandsMen Product	Quantity	Total Amount	HandsMen Order: Created Date
- (1)	Alphia Frenita Fernandes	-	Scarfs	600	6,000	7/18/2025
Subtotal				600	6,000	
Pending (1)	Alphia Frenita Fernandes	Shanaya	Blazer	510	12,750	7/17/2025
Subtotal				510	12,750	
Confirmed (12)	Alphia Frenita Fernandes	Ria	-	600	-	7/17/2025
	Alphia Frenita Fernandes	Shanaya	Blazer	520	-	7/17/2025
	Alphia Frenita Fernandes	Shanaya	Scarfs	100	1,000	7/17/2025
	Alphia Frenita Fernandes	Ria	-	540	-	7/17/2025
	Alphia Frenita Fernandes	Ria	Scarfs	500	5,000	7/17/2025
	Alphia Frenita Fernandes	Ria	Scarfs	200	2,000	7/17/2025
	Alphia Frenita Fernandes	Shanaya	Scarfs	300	3,000	7/17/2025
	Alphia Frenita Fernandes	Ria	Scarfs	600	6,000	7/17/2025
	Alphia Frenita Fernandes	Shanaya	Scarfs	700	7,000	7/17/2025
	Alphia Frenita Fernandes	Ria	Blazer	7	175	7/18/2025
	Alphia Frenita Fernandes	Ria	Scarfs	500	5,000	7/18/2025
	Alphia Frenita Fernandes	Ria	Scarfs	550	5,500	7/18/2025
Subtotal				5,117	34,675	
Total (14)				6,227	53,425	

Row Counts Detail Rows Subtotals Grand Total

Fig 3.2

➢ Dashboards

To make the reporting visual and actionable, a dashboard was created and linked directly to the report data. It included:

- **Donut Chart:** Visual representation of orders segmented by product category, helping identify which categories are performing well.
- **Line Graph:** Time-series graph showing monthly order volumes to highlight growth or decline patterns over time.

The dashboard is accessible via the Dashboards tab and provides real-time insights to managers and decision-makers without requiring them to run reports manually.

Refer to the included dashboard image (3.3) for an overview of real-time analytics.

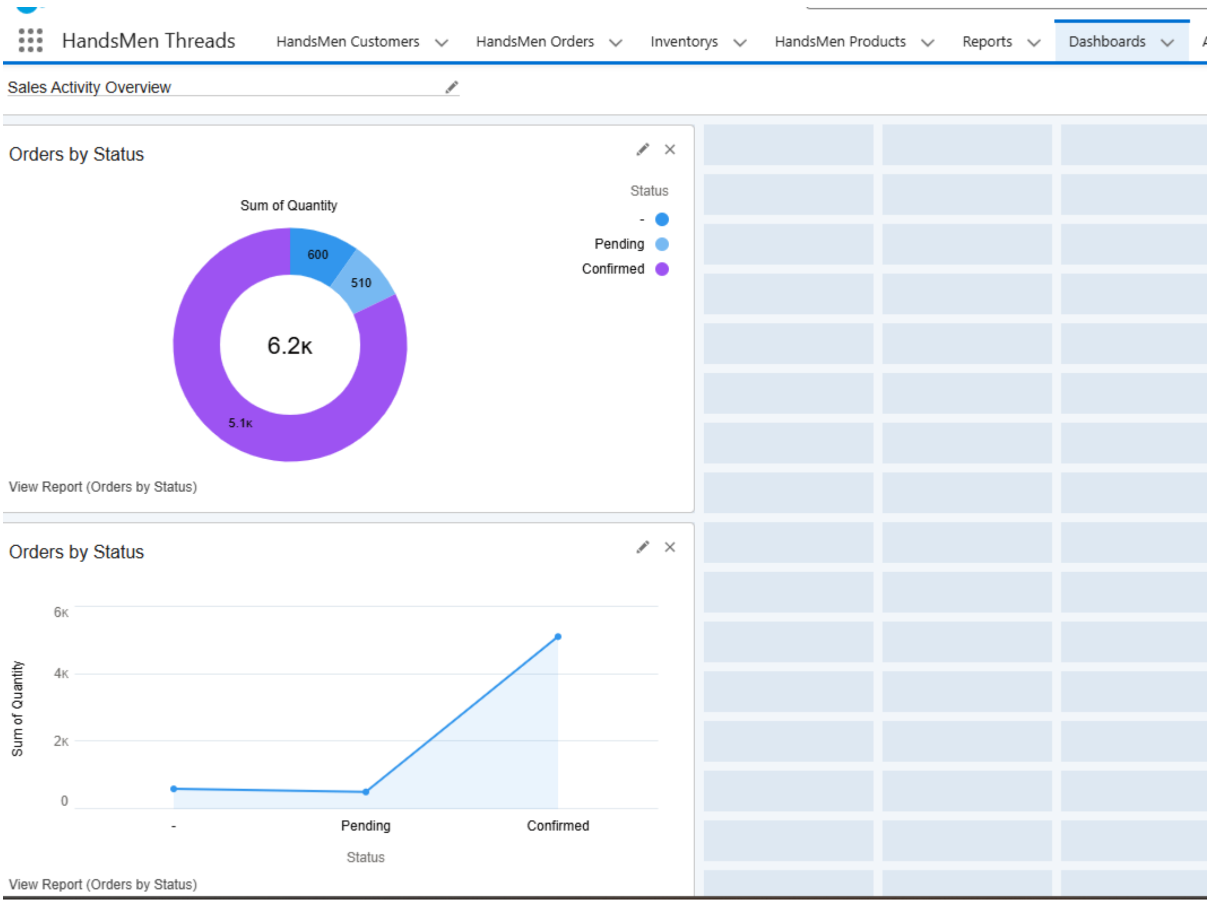


Fig 3.3

This phase ensured that the HandsMen Threads app was not only functional but also intuitive, with each user receiving an experience customized to their role. With real-time reports and dashboards, the system enabled smarter, data-driven decision-making across sales, inventory, and marketing.

Phase 4: Data Migration, Testing & Security

This phase ensured that the system was populated with accurate data, thoroughly tested, and securely configured for all users and departments.

➢ Data Migration

Data migration was performed using the Data Import Wizard, which allowed importing records into custom objects like:

- HandsMen Products
- Inventory
- HandsMen Orders
- Customers
- Marketing Campaigns

Care was taken to ensure relational fields (e.g., lookups between Orders and Products) were preserved accurately during import.

➢ Security Model Implementation

The organization-wide defaults and access controls were configured using:

- **Profiles & Roles**:
    - Sales Manager: Full access to Customers and Orders.
    - Inventory Manager: Read/Edit access to Inventory and Products.
    - Marketing Manager: Read-only access to Customers; Edit access to Marketing Campaigns.
- **Role Hierarchy**:
    - All roles were created under the **CEO** node.
        - CEO
            - Sales Manager (Niklaus Mikaelson)
            - Inventory Manager (Kol Mikaelson)
            - Marketing Manager (Amy Mikaelson)

Role hierarchy setup, including CEO, Sales Manager, Inventory Manager, and Marketing Manager, is shown in the image (4.1) and (4.2) below.

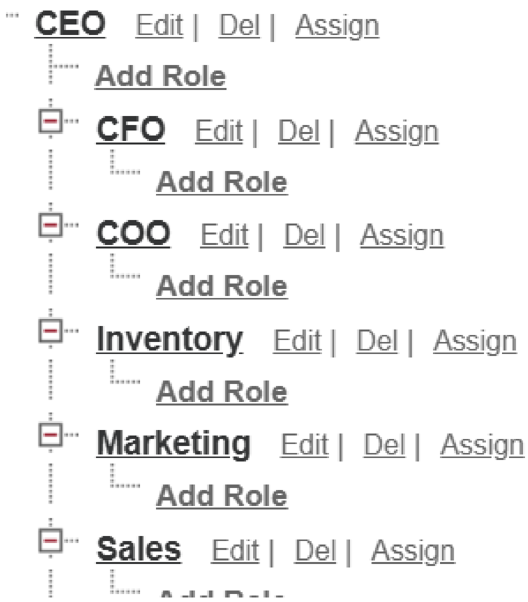


Fig 4.1

Mikaelson, Amy	amika	amika00@gmail.com	Marketing	✓	Platform 1
Mikaelson, Kol	kmika	kmika00@gmail.com	Inventory		Platform 1
Mikaelson, Niklaus	nmika	nmika00@gmail.com	Sales	✓	Platform 1

Fig 4.2

➢ Testing

➢

To ensure the reliability and correctness of all developed Salesforce features, comprehensive test cases were prepared for each key functionality. These test cases include clearly defined inputs, expected outputs, actual results, and are supported by screenshots to serve as visual proof of execution.
The following Salesforce features were tested:

- Booking Creation:
  Test cases were prepared to validate the successful creation of new orders under various input conditions. Input screenshot (4.3) display sample data entries, while output screenshot (4.4) confirm that the order was saved with the correct calculated values and linked to the correct product and customer.

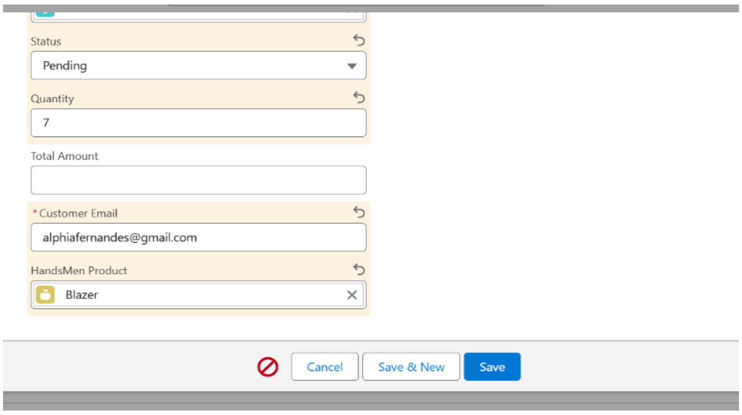


Fig 4.3

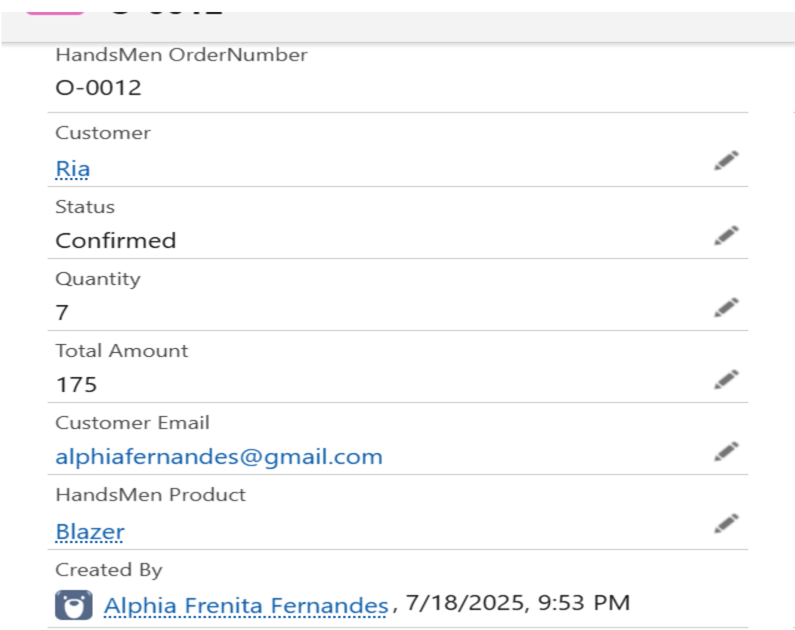


Fig 4.4

- Automatic Task Creation (via Flows):
  Flows were used to send email alerts rather than create tasks. Test cases were created to ensure that alerts were sent successfully based on specific triggers (e.g., low stock levels). Screenshots include flow setup and execution results (e.g., email sent confirmation).
  - ❖ Image 4.5 displays the successful order confirmation email sent to the customer immediately after the order was placed, confirming the system-triggered flow is functioning as expected.

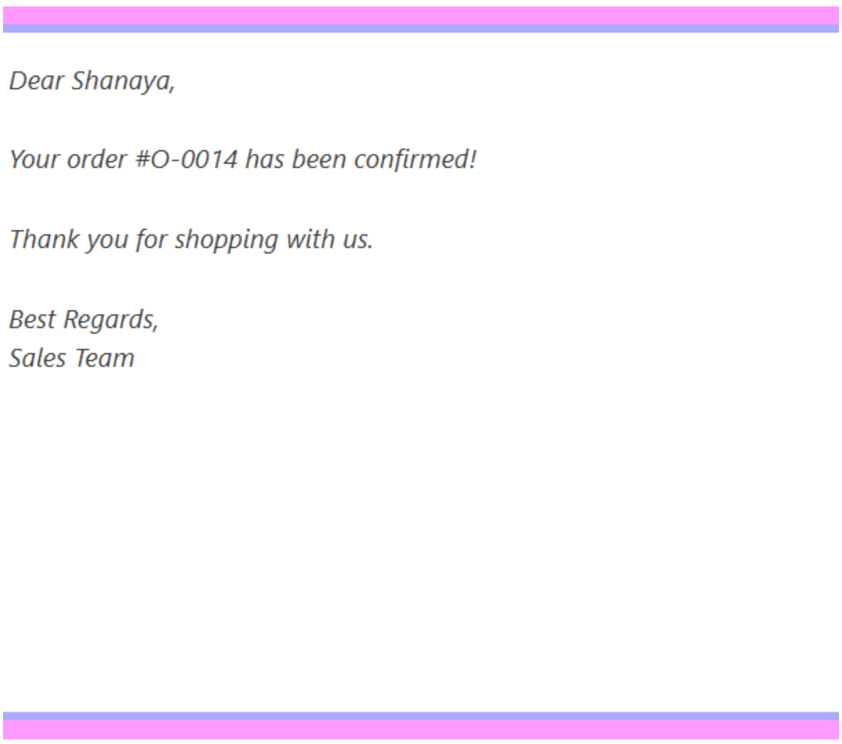


Fig 4.5

❖ Image 4.6 highlights an inventory item with quantity set to 3, which meets the alert criteria of "less than 5 units," leading to the automated email alert flow. Image 4.7 confirms that the alert email was triggered and sent successfully.

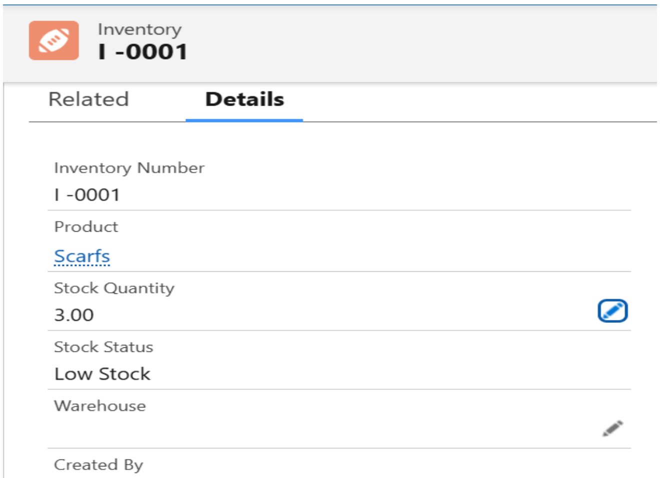


Fig 4.6

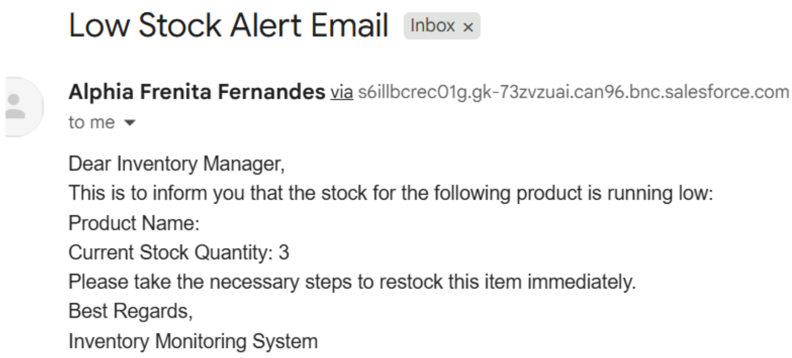


Fig 4.7

❖ Image 4.8 shows a customer's purchase history reaching the defined threshold set for loyalty evaluation, while Image 4.9 displays the automatic update of the loyalty status to **"Bronze"**, triggered by the scheduled flow configured to run weekly and check eligibility based on cumulative purchases.

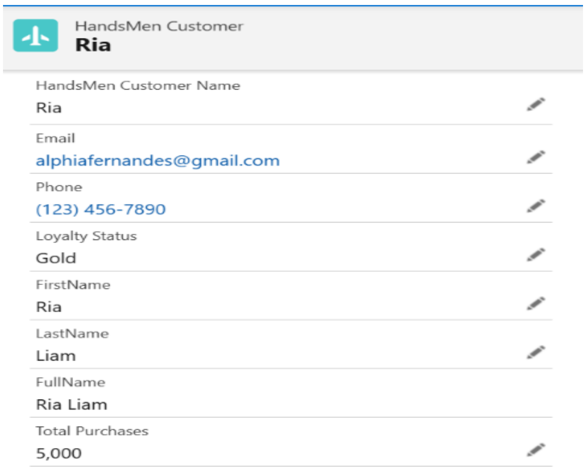


Fig 4.8

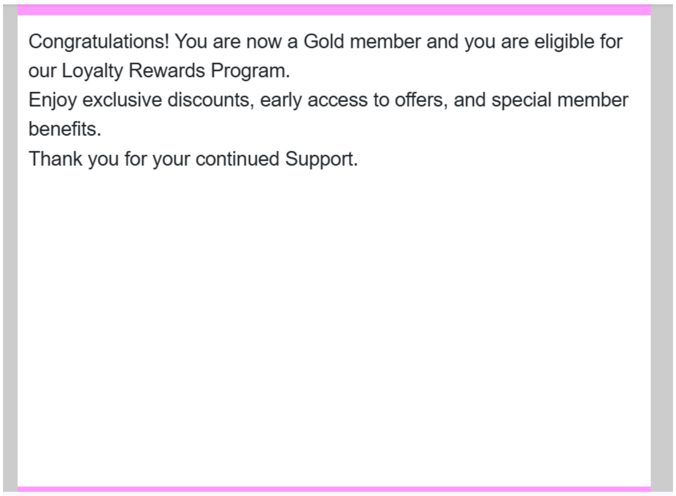


Fig 4.9

- Flows (Email Alerts):
  Each flow was tested to confirm it runs correctly under defined conditions. For instance, the flow configured to send alert emails when stock falls below reorder level was tested using controlled data inputs
-
  - Image 4.10 shows the **Order Confirmation Flow**, a record-triggered flow that activates upon successful order creation. The flow automatically sends a confirmation email to the customer, ensuring prompt acknowledgment of their purchase.

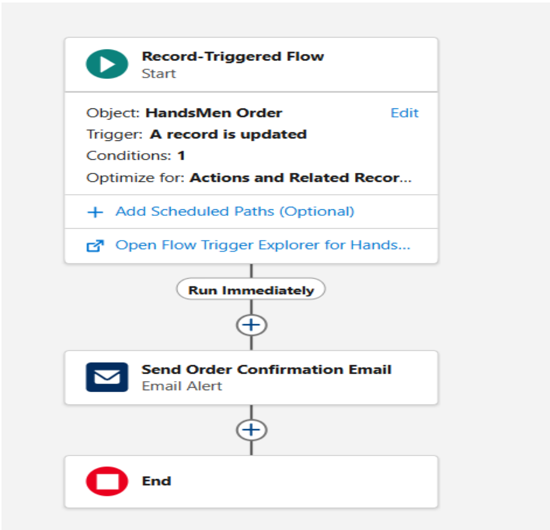


Fig 4.10

  - Image 4.11 captures the **Stock Alert Flow**, also a record-triggered flow, designed to monitor inventory levels. When the stock quantity of a product falls below the predefined threshold (e.g., 5 units), this flow triggers an alert email to the inventory manager to restock the item.

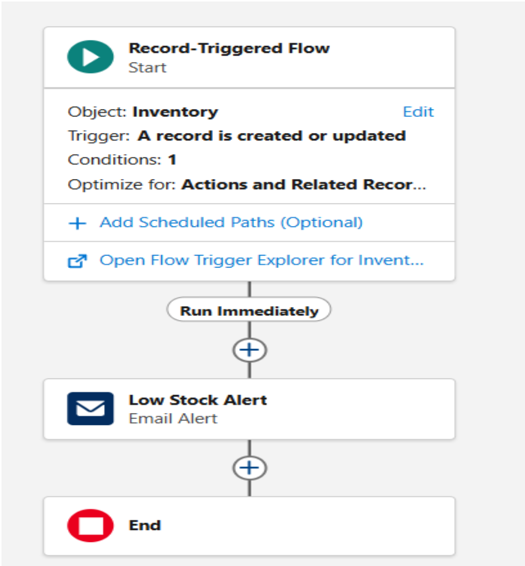


Fig 4.11

- Image 4.12 presents the **Loyalty Status Update Flow**, a scheduled flow configured to run daily. It evaluates each customer's Total_Purchases__c and updates their Loyalty_Status__c based on tiered logic—customers with purchases over 1000 are set to **Gold**, those under 500 to **Bronze**, and all others to **Silver**. This automated segmentation ensures timely rewards based on customer engagement.

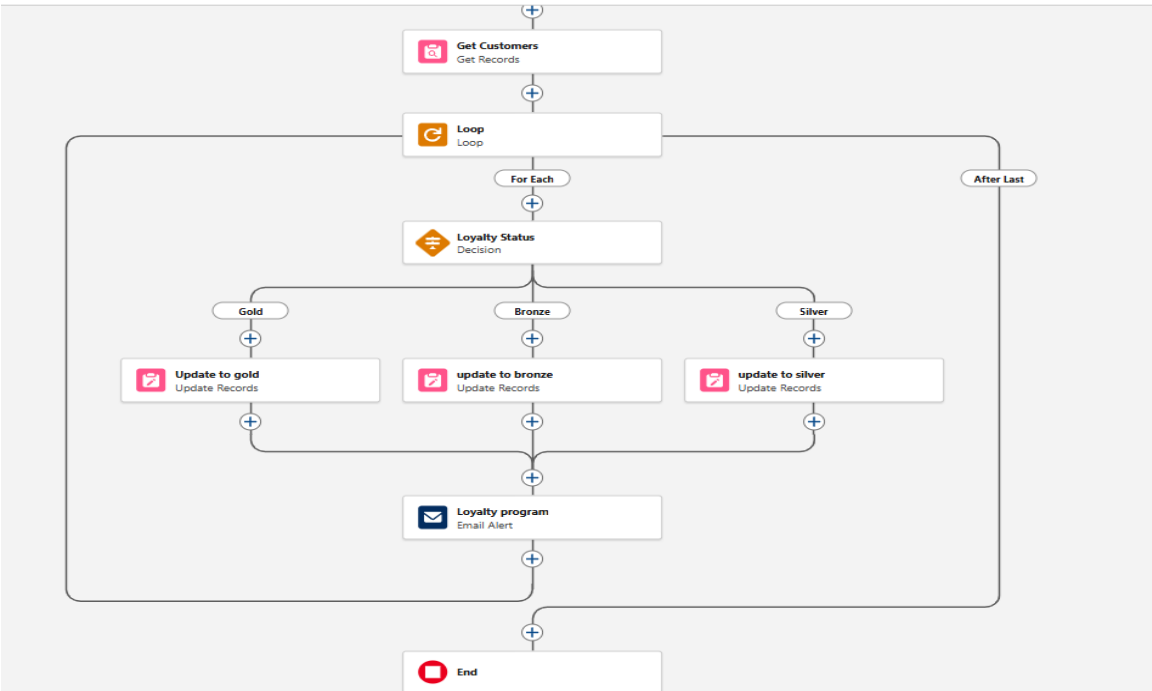


Fig 4.12

- Apex Triggers:
  Three key triggers were tested:
  - Order Total Update: Ensured that Total_Amount__c gets updated correctly on order creation.
    Image 4.13 shows the Order record before saving, with the Total_Amount__c field empty, while Image 4.14 captures the same record post-save, where the amount is automatically calculated and updated by the **Order Total Update** trigger, ensuring accurate order cost computation.

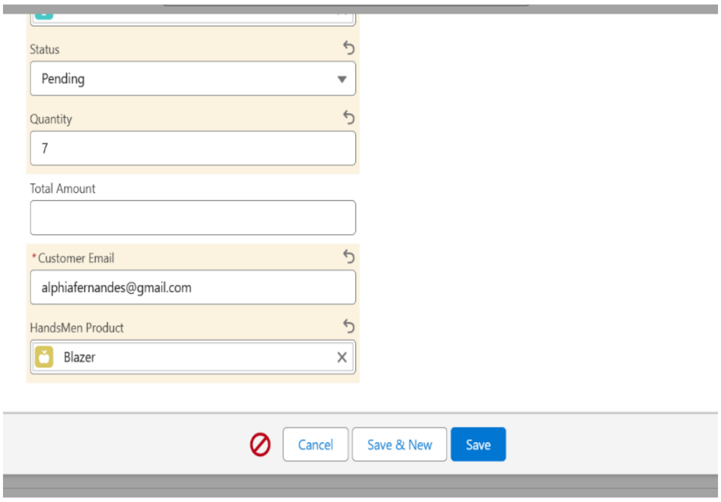


Fig 4.13

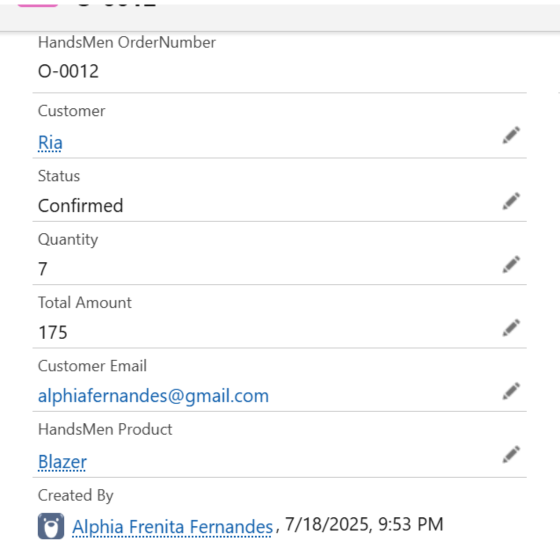
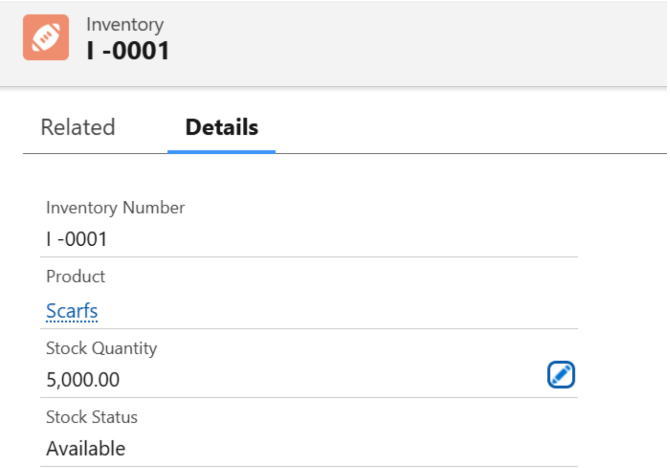


Fig 4.14

  - Stock Deduction: Verified that product stock is reduced automatically when an order is placed.
    Image 4.15 captures the Inventory object before stock deduction, Image 4.16 displays a Order of 500 and Image 4.17 shows the reduced stock count after the order was placed, as triggered by the Stock Deduction Apex trigger



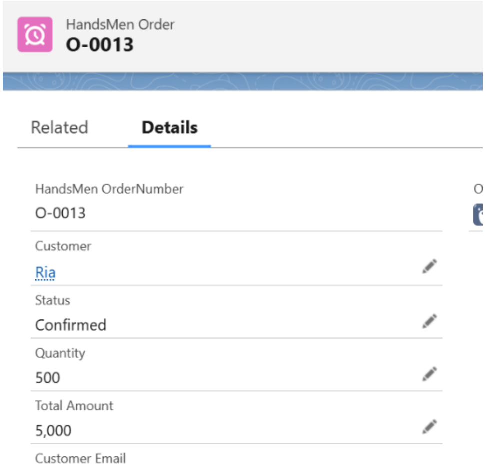


Fig 4.15 and Fig 4.16

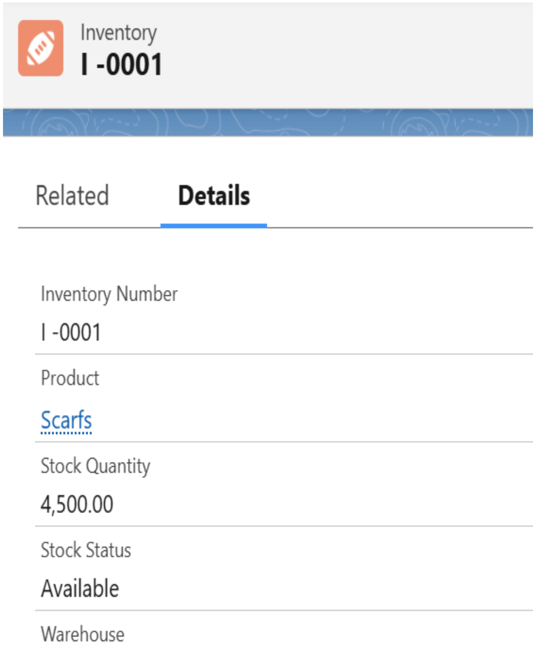


Fig 4.17

- Loyalty Status Update: Confirmed that customer loyalty status is correctly upgraded based on order history.

Each trigger has dedicated test cases with before-and-after screenshots displaying the field values and confirming the backend logic execution.

- Batch Apex Jobs:

1. LoyaltyPointsCalculation:
   A batch job scheduled to run every Sunday at 12:00 AM. It calculates and updates customer loyalty points based on their weekly order activity.
2. InventorySyncJob**:**
   Runs daily at 2:00 AM to synchronize stock levels in Salesforce with the external warehouse system, ensuring data consistency across platforms.

Phase 5: Deployment, Documentation & Maintenance

➢ Deployment Strategy

The deployment was executed entirely within the **Salesforce production system**. No sandbox or change sets were used. All configurations—including custom objects, fields, automation, triggers, flows, and profiles—were created and tested directly in the live environment. Each component was implemented in a phased and controlled manner to ensure real-time testing and accuracy.

➢ System Maintenance & Monitoring

Ongoing maintenance will be handled manually by the Salesforce admin. Key practices include:

- Monitoring **trigger executions** and **flow alerts** through email notifications.
- Verifying data consistency in **Orders**, **Inventory**, and **Customer** records.
- Checking the execution of **scheduled batch jobs** (e.g., Loyalty Points Calculation and Inventory Sync).
- Periodic updates to **user roles**, **profile permissions**, and **object-level security** based on organizational needs.

➢ Troubleshooting Approach

A practical troubleshooting approach has been documented to support quick resolution of any issues. This includes:

- Using **Apex Debug Logs** and error messages to trace issues in flows or triggers.
- Guidelines for resolving **validation rule errors** and **record mismatches**.
- Step-by-step process to adjust user access in case of permission-related issues.
- Instructions to handle **inventory conflicts** and **loyalty status errors**.

➢ Documentation

Comprehensive documentation has been prepared covering:

- Feature implementation steps.
- Data model and security model.
- Sample test cases with inputs and expected outputs.
- Screenshots of critical configurations and user interfaces.
  This ensures clarity and ease of understanding for future developers, admins, and users involved in system management.

Conclusion

The HandsMen Threads Salesforce CRM Implementation Project successfully streamlined the company's core operations—Sales, Inventory, and Marketing—into a centralized, automated, and user-friendly Salesforce environment. Using custom objects, automation tools like flows and triggers, and role-based access controls, we built a tailored CRM solution that meets the unique business needs of HandsMen Threads.

All key modules including customer and order management, inventory tracking, loyalty programs, and marketing campaign handling were configured with full backend and frontend functionality. The system was thoroughly tested with real-time data and documented for maintainability. With clearly defined user roles (Sales Manager, Inventory Manager, Marketing Manager) and automated batch processes for loyalty and inventory sync, the platform is both scalable and secure.

Future Enhancements

To enhance the functionality and user experience of the HandsMen Threads Salesforce system, the following improvements are proposed for future implementation:

- **Mobile Accessibility:** Adapt and optimize the Salesforce interface for mobile users, enabling sales and inventory managers to perform tasks on-the-go.
- **Campaign Management Automation:** Automate marketing campaigns using Scheduled Flows or Marketing Cloud tools to reach specific customer segments based on loyalty tiers or purchase history.
- **Customer Portal:** Develop a secure portal where customers can view their order history, track deliveries, and manage personal details.
- **Loyalty Program Expansion:** Extend the existing loyalty logic to offer personalized promotions, discounts, and rewards based on user activity or referrals.
- **Role-based Dashboards:** Create tailored dashboards for Sales Manager, Inventory Manager, and Marketing Manager roles to present only the most relevant KPIs and insights.
- **AI-driven Recommendations:** Utilize Salesforce's AI capabilities to provide product or service recommendations based on user preferences and purchase patterns.

This project has laid a strong foundation for HandsMen Threads to enhance its customer relationships, operational efficiency, and data-driven decision-making in the long term.