HandsMen Threads Salesforce CRM Project Documentation

By: Iya Nicole DC. Buenaventura

Overview

HandsMen Threads is a growing men's fashion brand aiming to modernize its operations and enhance customer experience. To achieve this, the company implemented Salesforce CRM to centralize data, automate key processes, and provide actionable insights. The system supports order processing, inventory management, loyalty tracking, automated communication, and reporting, helping the business run more efficiently and prepare for future growth.

Objectives

The Salesforce CRM was built with the following goals:

- **Customer Management:** Maintain accurate and complete customer records.
- **Automation:** Automatically send order confirmations, update loyalty statuses, and notify staff of low-stock items.
- **Inventory Monitoring:** Track stock in real-time to avoid shortages.
- **Loyalty Program:** Reward repeat customers automatically.
- **Data Accuracy:** Use validation rules and duplicate prevention for clean data.
- **Analytics & Reporting:** Provide dashboards and reports for management insights.
- **Security & Access Control:** Assign roles, profiles, and permissions to protect sensitive information.
- **Scalability:** Support future business growth with flexible workflows and automation.

Phase 1: Requirement Analysis & Planning

1. **Understanding Business Needs:**
   - Manual processes caused delays in order confirmations and loyalty updates.
   - Inventory monitoring was inconsistent, leading to stockouts or overstock.
   - Reporting was fragmented, making it difficult for management to analyze sales trends.
   - Duplicate or inaccurate records caused operational inefficiencies.
2. **Scope Definition:**
   In Scope: Custom objects, fields, validation rules, automation flows, email alerts, loyalty tracking, Lightning App setup, reports and dashboards, role-based access, testing, documentation, and demo video.
   Out of Scope: Integration with e-commerce platforms, POS/warehouse systems, and payment gateway APIs.
3. **Data Model & Security:**
   - Custom objects: Customer, Product, Inventory, Order, Order Item, Payment, Loyalty Log.
   - Relationships: Customer → Orders, Orders → Order Items, Product → Inventory/Order Items, Order → Payment.
   - Security: Profiles for Admin, Sales, Warehouse, Finance; permission sets for sensitive data; role hierarchy to ensure proper visibility.
4. **Stakeholders:** Business Owner, Sales Team, Warehouse Team, Finance Team, System Administrator, Customers.
5. **Execution Roadmap:** Requirement gathering → Data modeling → Backend automation → UI setup → Reports & dashboards → Data migration & testing → Deployment → Documentation & demo video.
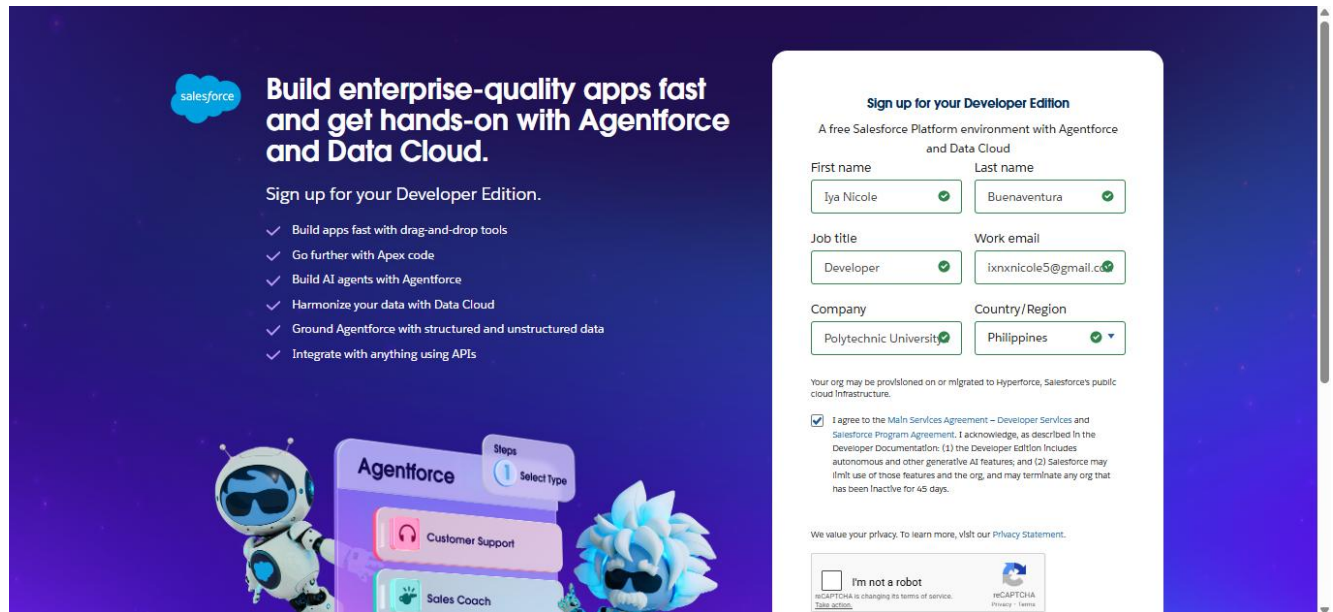
Phase 2: Salesforce Development – Backend & Configurations

- **Environment Setup:** Developer org and sandbox created; change sets prepared for deployment.

- **Objects & Fields:** Custom fields for loyalty tier, product price, inventory quantity, order status, payment details.
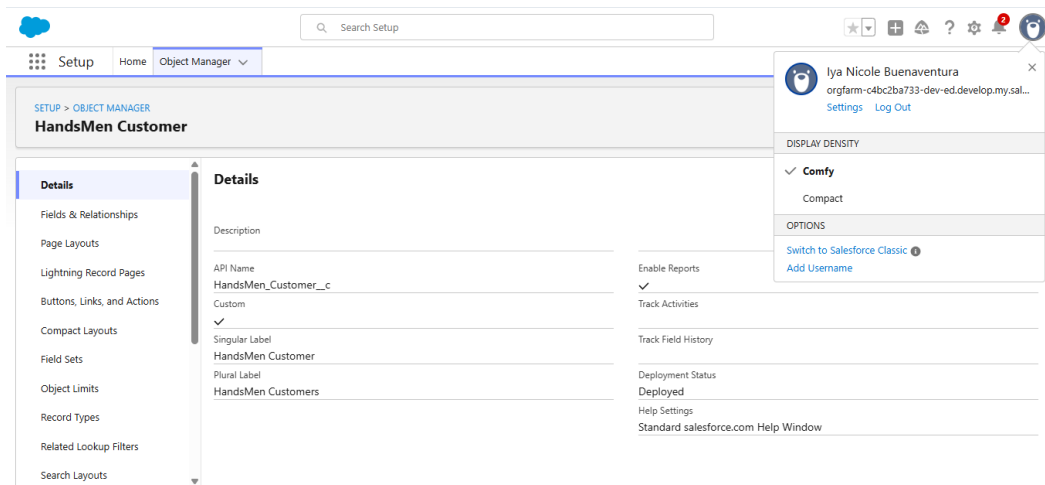
- **Validation Rules:** Prevent orders if stock is insufficient; mandatory field enforcement; payment amount validation.
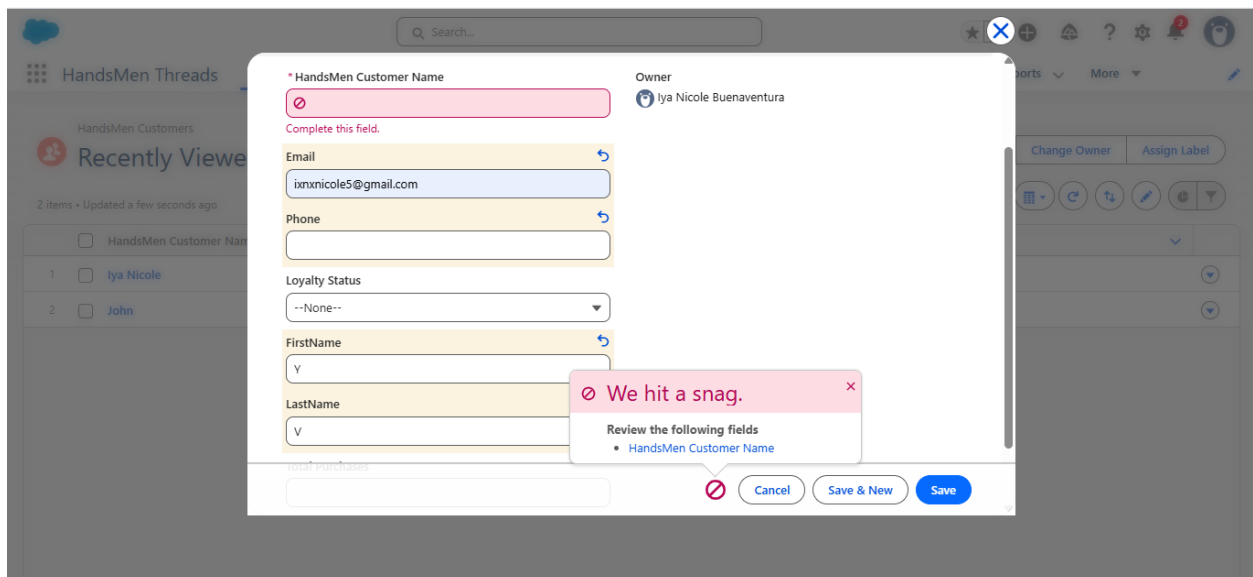
- **Automation Flows:**
  - Record-triggered flows: order confirmation emails, loyalty tier updates, low-stock alerts.
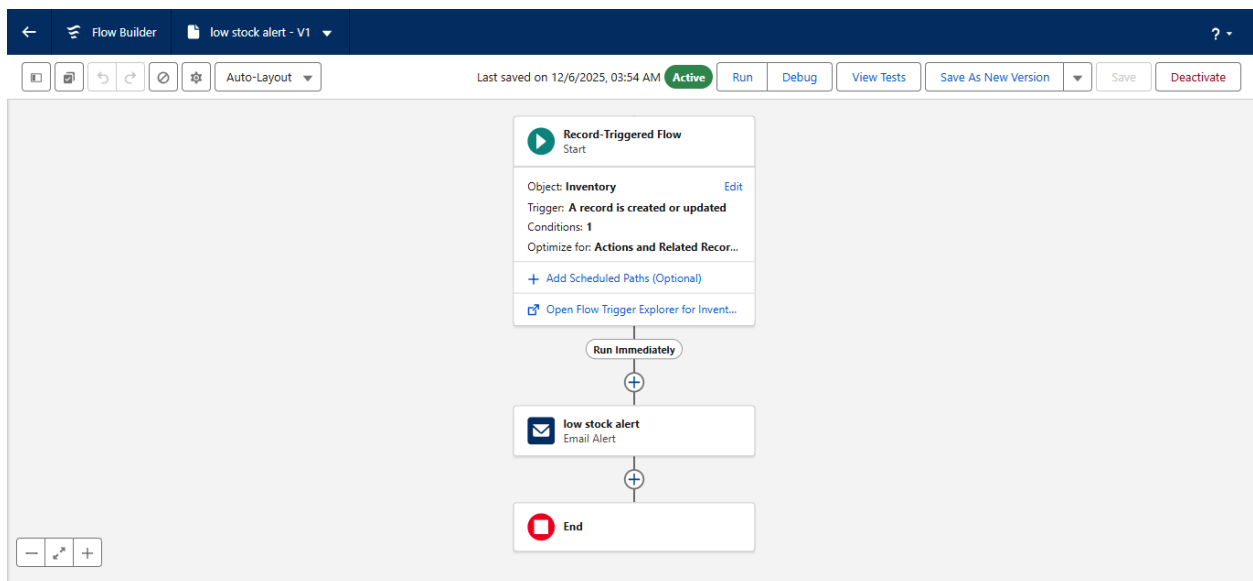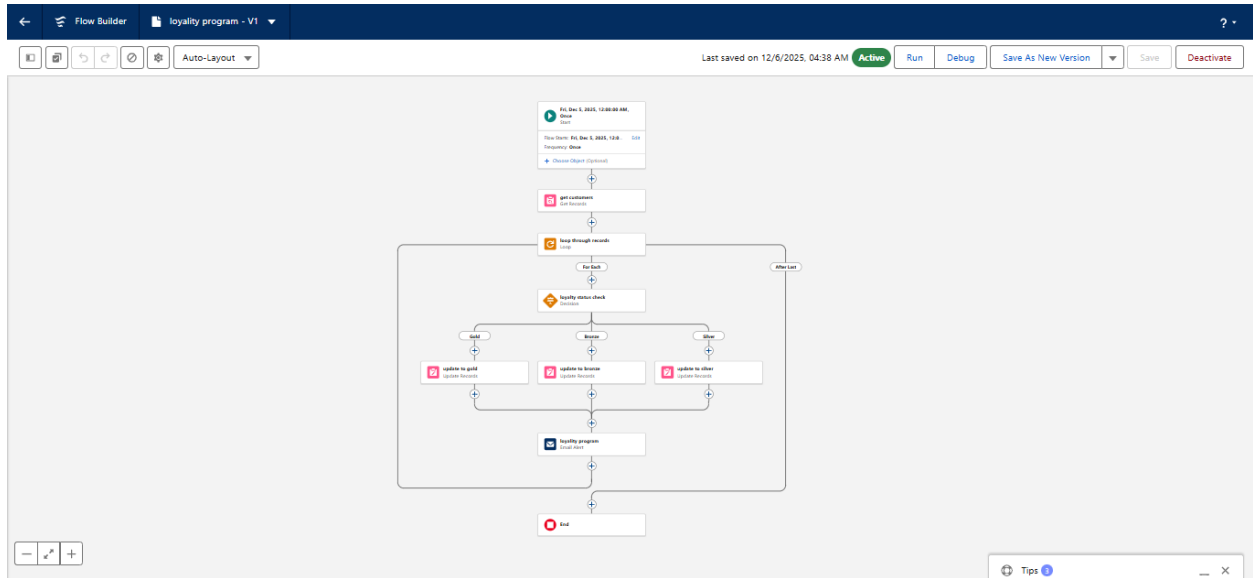
- **Inventory Low Stock Alert -** The flow triggers when an Inventory record is updated and the quantity is below a set threshold (e.g., 5 units).

- **Loyalty Status Update -** The flow checks customer spending and updates the Loyalty Status field on the Customer record.

  - o Scheduled flows: nightly bulk processing for inventory and financial adjustments.
- **Apex Classes:** Only applied if needed for complex logic exceeding Flow limits.
- **Screenshots:** Document all object creation, validation rules, and automation.

Phase 3: UI/UX Development & Customization

- **Lightning App:** Tabs for Customers, Products, Orders, Payments, Inventory.

- **Page Layouts:** Dynamic forms, conditional visibility, role-based layouts.

- **Reports & Dashboards:** Top-selling products, daily orders, low-stock items, loyalty summaries.
- **User Management:** Profiles, roles, and permission sets based on responsibilities.
- **Lightning Pages:** Custom Home Page and record pages with components.
- **Screenshots:** Include every configuration and page setup.

Phase 4: Data Migration, Testing & Security

- **Data Migration:** Use Data Import Wizard and Data Loader for customer, product, order, payment, and loyalty data.
- **Field History Tracking & Duplicate Management:** Track changes and prevent duplicates.
- **Security Configuration:** Profiles, roles, permission sets, and sharing rules applied.
- **Testing Approach:** Prepare test cases for order creation, loyalty updates, low-stock alerts, scheduled flows, and validation rules. Document input and output screenshots.

Phase 5: Deployment, Documentation & Maintenance

- **Deployment:** Outbound change sets deployed after sandbox validation.
- **Maintenance:** Monthly review of workflows and dashboards, monitoring error logs.
- **Troubleshooting:** Use debug logs, Flow fault emails, and validation error tracking.
- **Continuous Improvement:** Collect user feedback for system optimization.
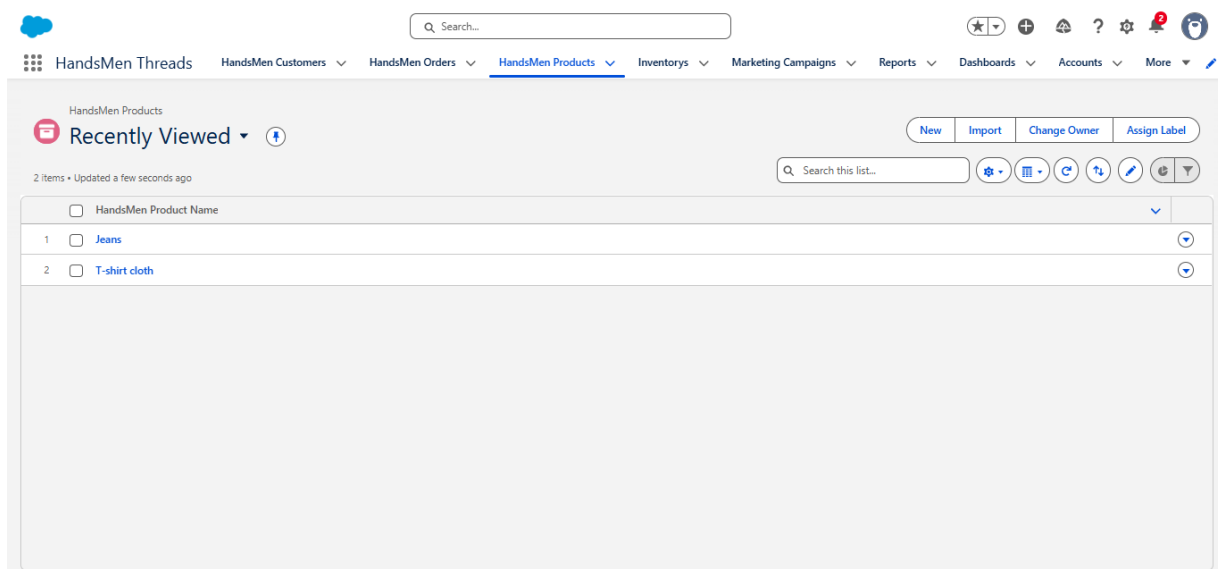
Figure: Product in Handsmen Threads
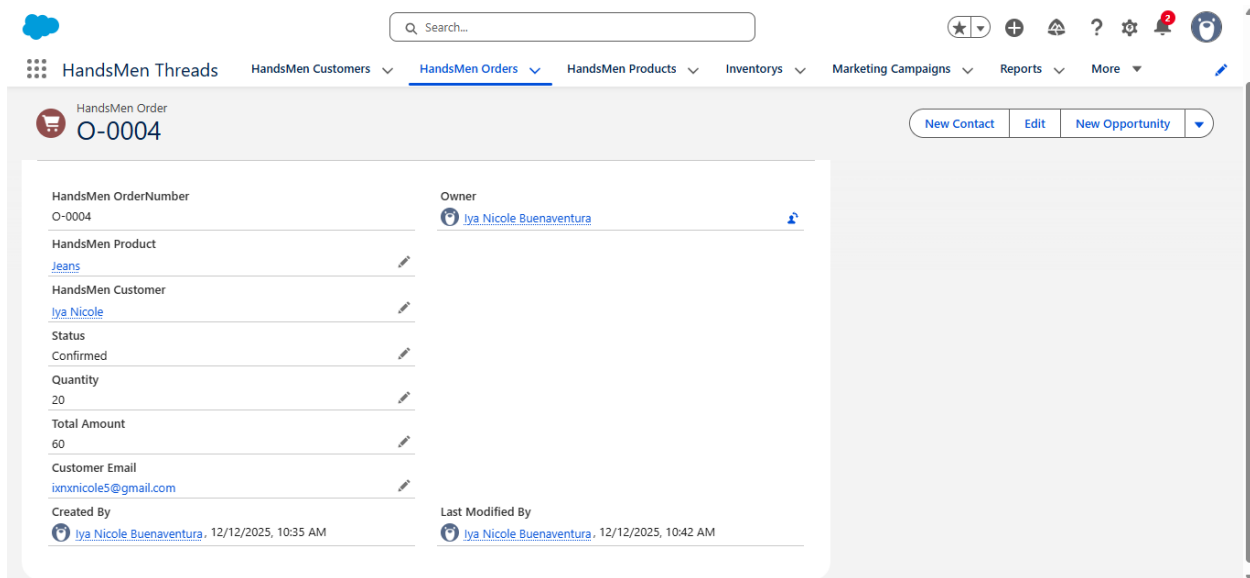
Figure: Order Information

Figure: Low Stock Alert Email

Conclusion

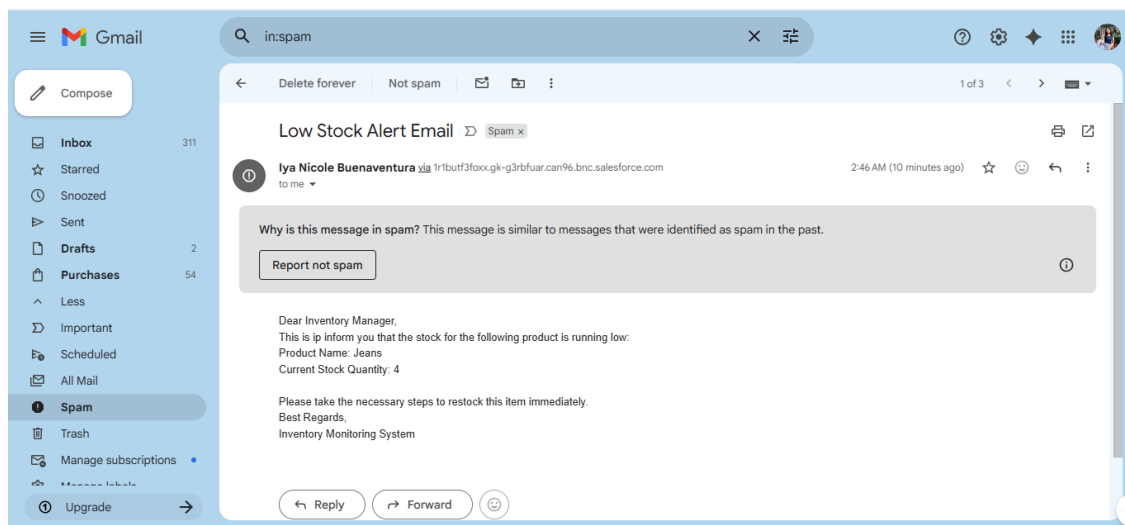The Salesforce CRM implementation has successfully provided HandsMen Threads with a centralized operational platform, delivering significant enhancements to both customer and internal experiences. Key operational processes, including orders, loyalty programs, and inventory management, are now fully automated, moving the company beyond manual workflows. The system is further fortified by real-time reporting and dashboards, offering management essential, immediate insights for data-driven decision-making. Built on a secure and scalable architecture, this solution is positioned not just to support current business needs, but also to serve as a robust foundation for future innovation, specifically enabling the integration of AI-based analytics, chatbot customer support, and essential mobile access for staff.