

## **PROJECT DOCUMENTATION:**

### **Project Overview**

HandsMen Threads, a growing fashion and retail organization, initiated a Salesforce CRM implementation to centralize customer information, streamline business operations, and improve service quality. The CRM is designed with a robust data model to store essential business data—such as customer records, orders, stock details, and loyalty information—ensuring smooth data flow across departments.

### **Objectives**

The primary objective of the CRM project is to equip HandsMen Threads with a unified, efficient, and automated system that supports customer management, order tracking, and inventory operations. The CRM aims to reduce manual work, minimize data errors, and establish automated communication with customers and warehouse teams, ultimately enhancing customer service and workflow efficiency.

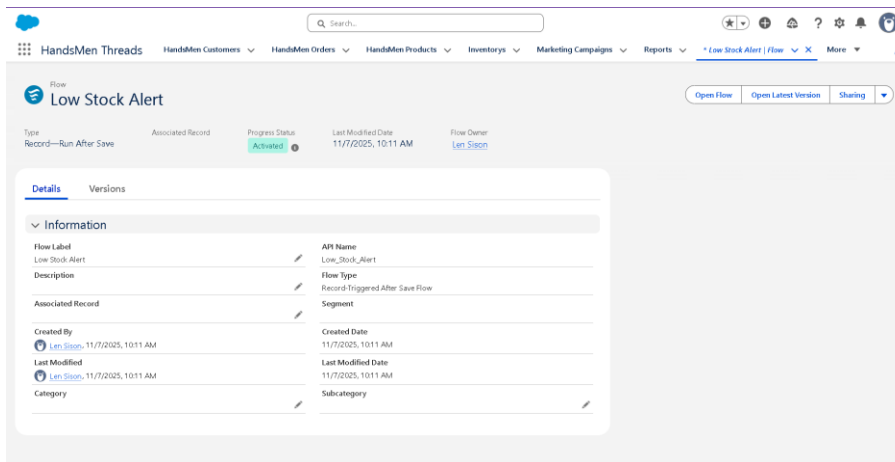
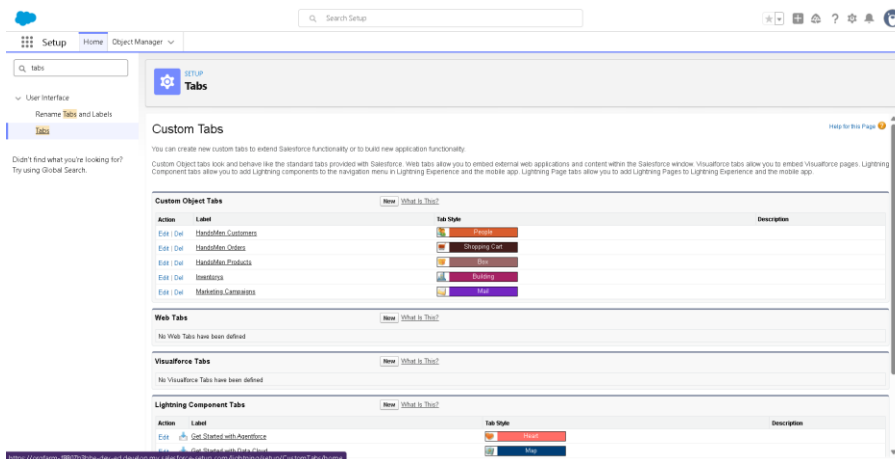
### **Phase 1: Requirement Analysis & Planning**

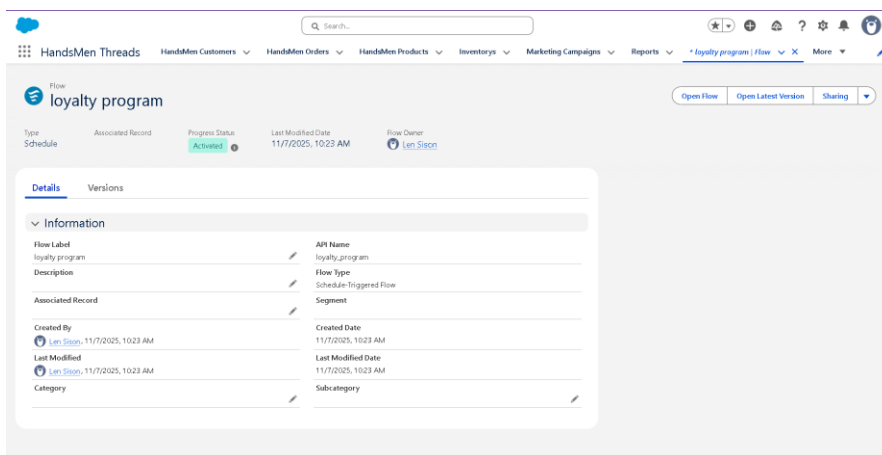
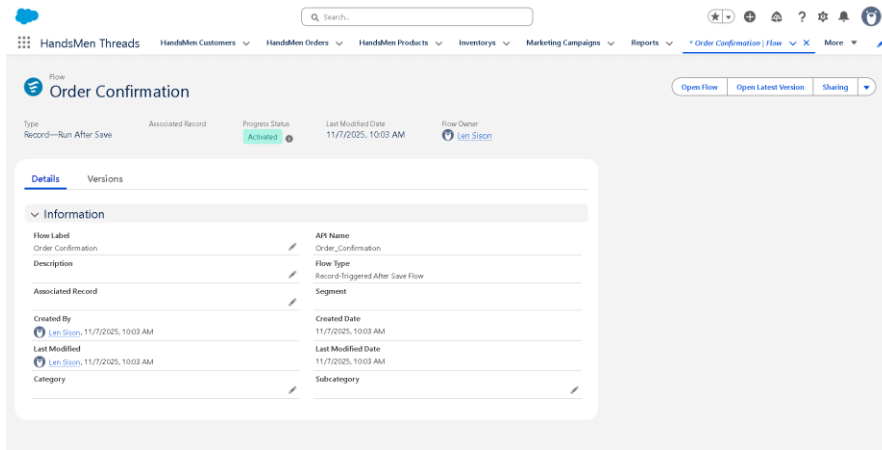
- Understanding Business Requirements
  - Centralize customer, order, and inventory data.
  - Automate repetitive processes.
  - Ensure accurate UI-based data entry.
  - Support loyalty program automation.
- Project Scope
  - Build custom data model.
  - Create flows, automation, and scheduled tasks.
  - Configure UI layouts and validation.
- Data & Security Model
  - Custom objects, fields, and relationships.
  - Profiles, roles, and permission sets.
- Stakeholders
  - Management, Sales Team, Warehouse Team, Admin.
- Execution Roadmap

1. Requirements 2. Data Model 3. Automation 4. UI 5. Testing 6. Deployment

## Phase 2: Salesforce Development – Backend & Configurations

- Environment Setup & DevOps Workflow
- Custom Objects, Fields, Validation Rules
- Automation via Workflow Rules, Process Builder, Flows, Approval Processes
- Apex Classes & Triggers
- Implemented Automations:
  - Automatic Order Confirmation Emails
  - Loyalty Status Auto-Updates
  - Stock Level Alerts (Stock < 5)
  - Midnight Bulk Order Processing





### Phase 3: UI/UX Development & Customization

- Lightning App Setup
- Page Layouts, Dynamic Forms, Lightning Pages
- User Management
- Reports and Dashboards
- LWC Development (if applicable)

### Phase 4: Data Migration, Testing & Security

- Data Migration via Data Loader / Wizard
- Field History Tracking, Duplicate Rules, Matching Rules
- Profiles, Roles, Permission Sets, Sharing Rules
- Test Classes for Apex

- Testing of booking creation, flows, triggers, approval processes, automations

```

1 trigger OrderTotalTrigger on HandsMen_Order__c (before insert, before update) {
2     Set<Id> productIds = new Set<Id>();
3
4     for (HandsMen_Order__c order : Trigger.new) {
5         if (order.HandsMen_Product__c != null) {
6             productIds.add(order.HandsMen_Product__c);
7         }
8     }
9
10    Map<Id, HandsMen_Product__c> productMap = new Map<Id, HandsMen_Product__c>(
11        [SELECT Id, Price__c FROM HandsMen_Product__c WHERE Id IN :productIds]
12    );
13
14    for (HandsMen_Order__c order : Trigger.new) {
15        if (order.HandsMen_Product__c != null && productMap.containsKey(order.HandsMen_Product__c)) {
16            HandsMen_Product__c product = productMap.get(order.HandsMen_Product__c);
17            if (order.Quantity__c != null) {
18                order.Total_Amount__c = order.Quantity__c * product.Price__c;
19            }
20        }
21    }
22 }

```

```

1 trigger StockDeductionTrigger on HandsMen_Order__c (after insert, after update) {
2     Set<Id> productIds = new Set<Id>();
3
4     for (HandsMen_Order__c order : Trigger.new) {
5         if (order.Status__c == 'Confirmed' && order.HandsMen_Product__c != null) {
6             productIds.add(order.HandsMen_Product__c);
7         }
8     }
9
10    if (productIds.isEmpty()) return;
11
12    // Query related inventories based on product
13    Map<Id, Inventory__c> inventoryMap = new Map<Id, Inventory__c>(
14        [SELECT Id, Stock_Quantity__c, HandsMen_Product__c
15         FROM Inventory__c
16         WHERE HandsMen_Product__c IN :productIds]
17    );
18
19    List<Inventory__c> inventoriesToUpdate = new List<Inventory__c>();
20
21    for (HandsMen_Order__c order : Trigger.new) {
22        if (order.Status__c == 'Confirmed' && order.HandsMen_Product__c != null) {

```

```

1 global class InventoryBatchJob implements Database.Batchable<SObject>, Schedulable {
2
3     global Database.QueryLocator start(Database.BatchableContext BC) {
4
5         return Database.getQueryLocator(
6
7             'SELECT Id, Stock_Quantity__c FROM Product__c WHERE Stock_Quantity__c < 10'
8
9         );
10    }
11
12    global void execute(Database.BatchableContext BC, List<SObject> records) {
13
14        List<HandsMen_Product__c> productsToUpdate = new List<HandsMen_Product__c>();
15
16        // Cast SObject list to Product__c list
17
18        for (SObject record : records) {
19
20            HandsMen_Product__c product = (HandsMen_Product__c) record;
21

```

## **Phase 5: Deployment, Documentation & Maintenance**

- Deployment via Change Sets
- Maintenance & Monitoring Guidelines
- Troubleshooting with Debug Logs, Apex Job Monitoring

## **Conclusion**

The Salesforce CRM implementation for HandsMen Threads significantly upgrades their operational workflow by automating order processes, ensuring accurate data management, and enhancing customer engagement. The system provides a scalable and efficient platform that supports long-term growth and future enhancements.

## **Future Enhancements**

- AI-based customer purchase prediction
- Chatbot integration