

Salesforce Project Documentation

Project Title:

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

Project Overview:

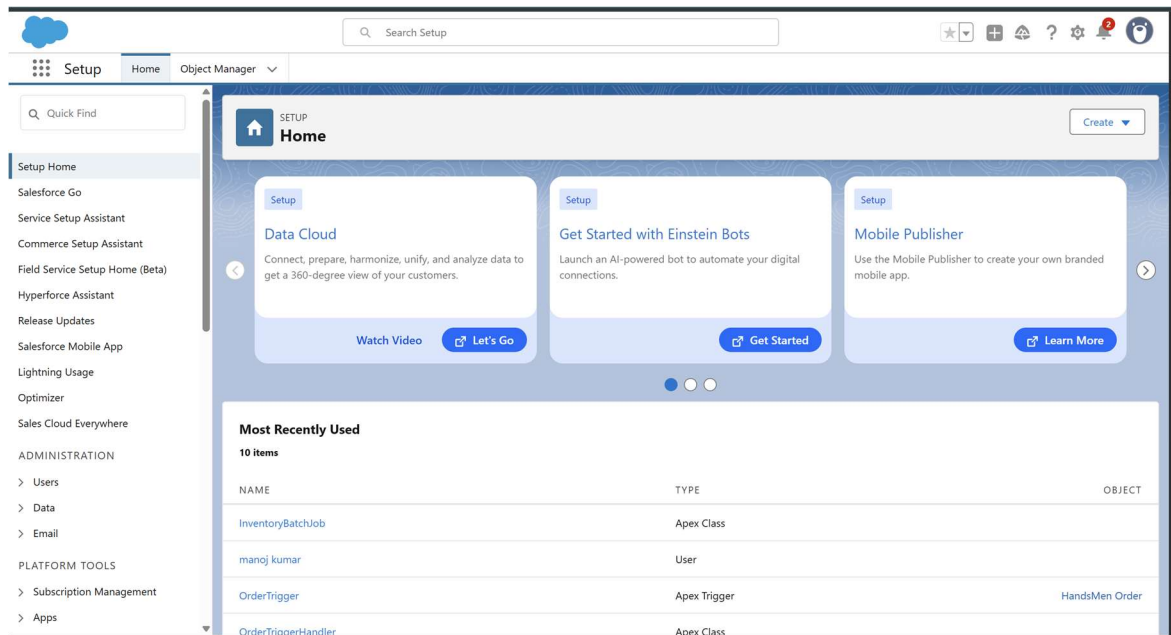
HandsMen Threads is a fashion-forward enterprise seeking to streamline its operations through a customized Salesforce CRM application. The system aims to centralize customer management, track product inventory, manage orders efficiently, and foster customer loyalty through automated processes. By incorporating automation, data integrity validation, and structured user roles, the project ensures seamless internal operations and enhanced customer engagement.

Objectives:

- Building a scalable data model tailored to the apparel industry
- Enabling automation for order confirmation and inventory tracking
- Enhancing customer retention through a dynamic loyalty program
- Providing visibility into sales, customer activity, and stock through reports and dashboards
- Ensuring clean, accurate data entry using validation rules and formula fields

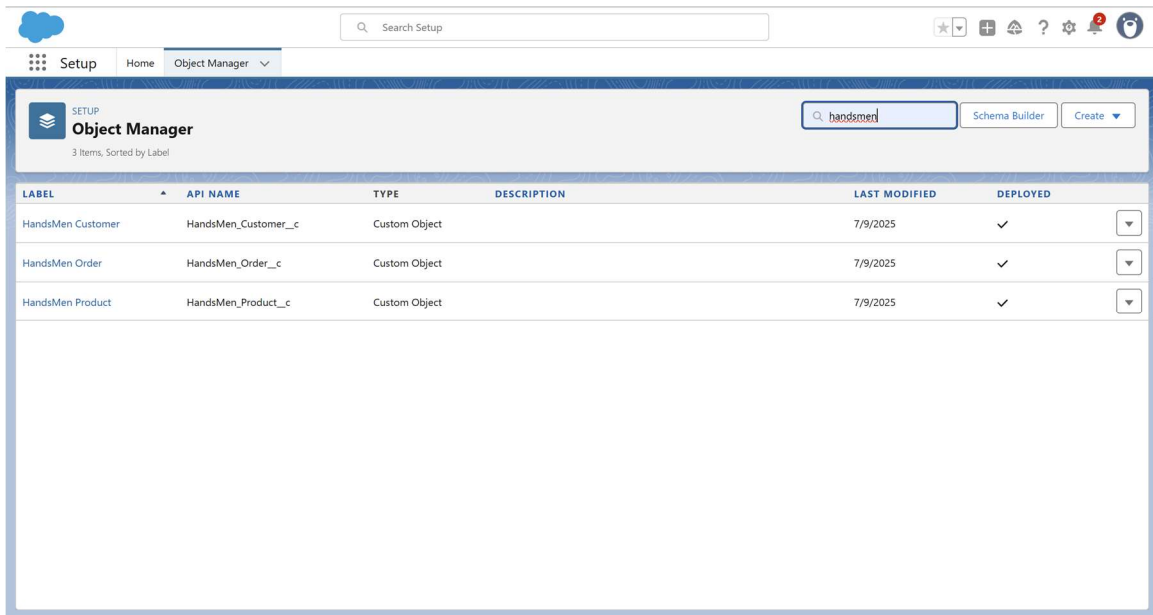
Phase 1: Requirement Analysis & Planning

- Capture and manage customer records, including name, phone, email, and loyalty status
- Enable staff to create and manage product listings, orders, inventory, and campaigns
- Automate confirmation emails, inventory restocking alerts, and loyalty updates
- Custom objects: HandsMen Customer, HandsMen Product, HandsMen Order, Inventory, Marketing Campaign
- Relationships: Lookup (Order ↔ Customer), Master-Detail (Inventory ↔



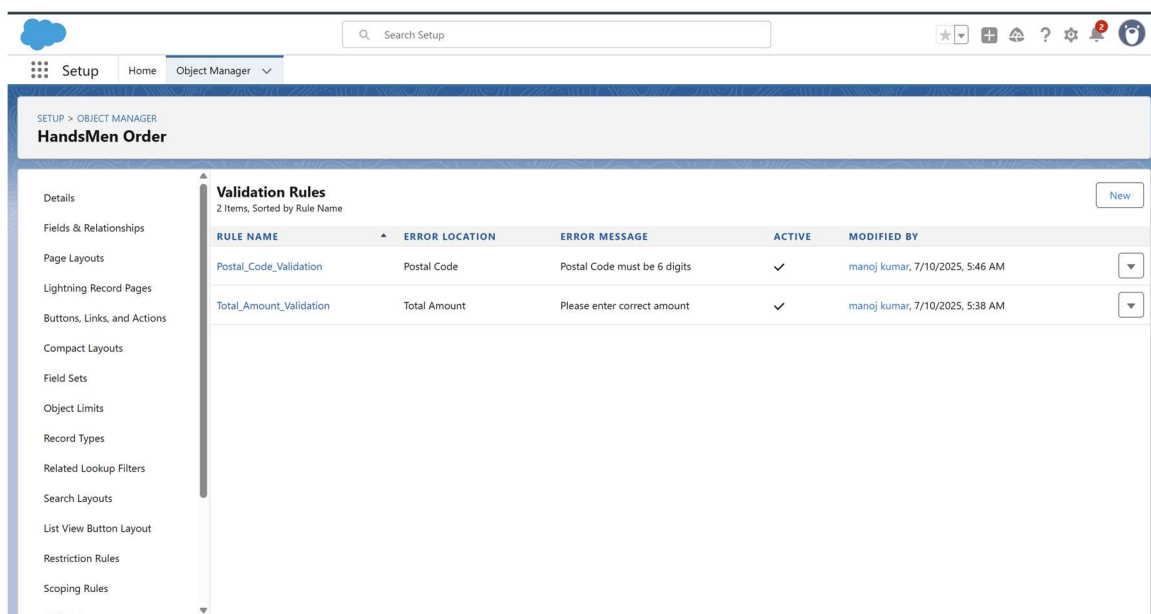
Product)

- Profiles, Roles, Permission Sets, and Role Hierarchies implemented
- Validation rules for quantity and email formats

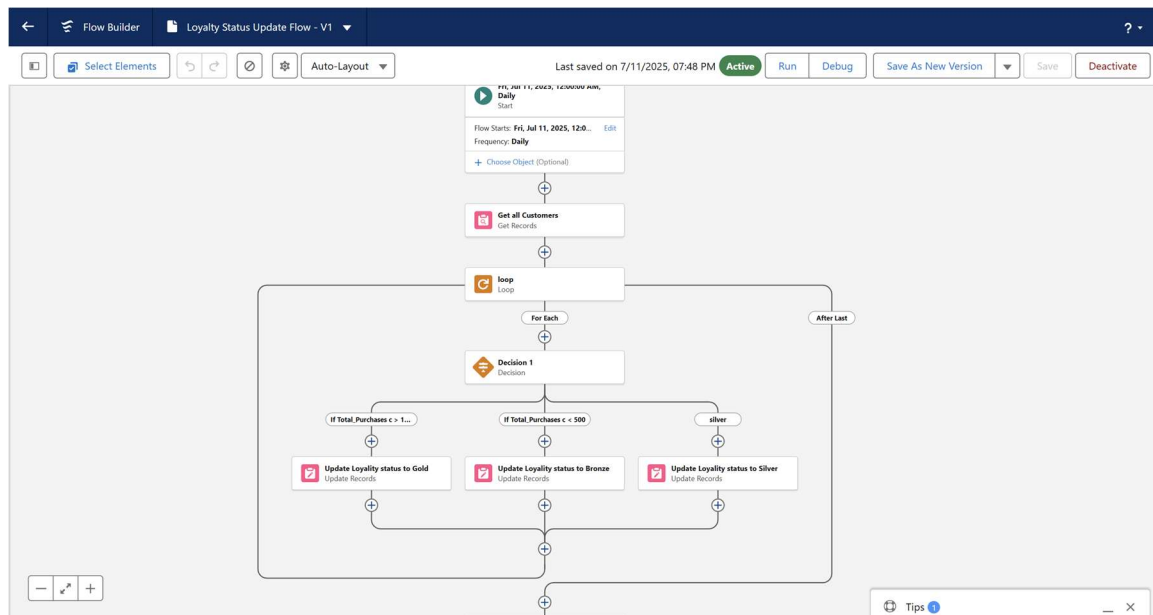
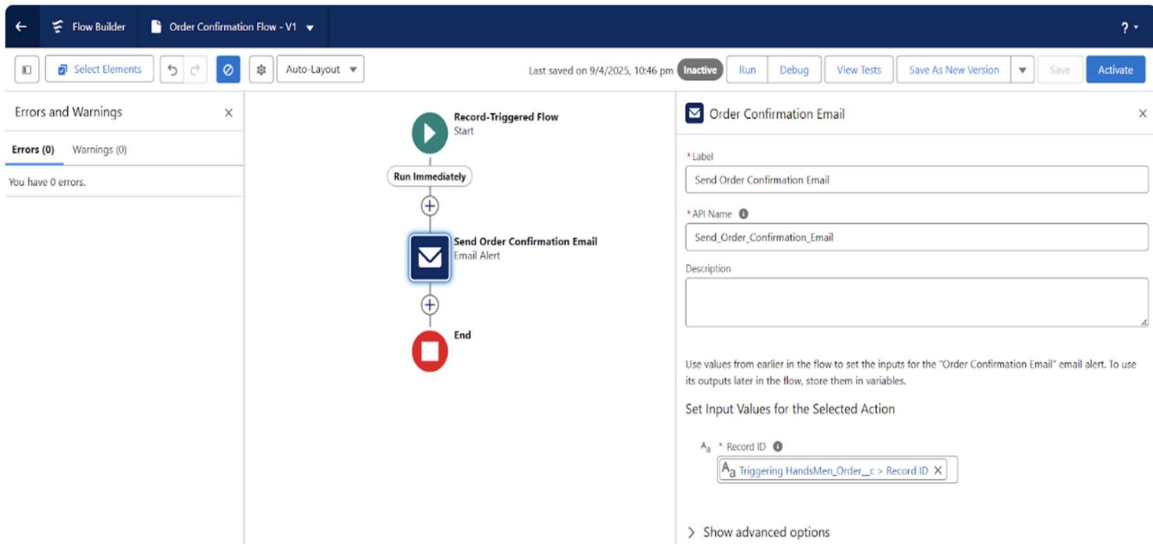


Phase 2: Salesforce Development – Backend & Configurations

- Created Developer Org and configured Dev Console and App Manager
- 5 custom objects created with text, picklist, auto-number, and formula fields
- Validation rules for status-based quantity and email format



- Apex Class: OrderTriggerHandler, Apex Trigger: OrderTrigger
- Batch Class: InventoryBatchJob to restock products
- Flows: Order confirmation email, Loyalty status update (scheduled), and Stock alert



Phase 3: UI/UX Development & Customization

- HandsMen Threads App configured using Lightning App Builder
- Navigation includes Customers, Orders, Inventory, Products, Reports, Campaigns
- Conditional visibility for dynamic forms and layouts
- User Roles: Sales, Inventory, Marketing, CEO
- Permission Set: Permission_Platform_1 for extended access

Phase 4: Data Migration, Testing & Security

- Imported sample data via Data Import Wizard
- Enabled Field History Tracking for key fields
- Profiles and Permission Sets configured
- Manual testing of validation rules, triggers, and batch logic

The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with 'Setup' selected, and a search bar for 'jobs'. The main content area is titled 'Scheduled Jobs' and displays a table of all scheduled jobs. The table includes columns for Action, Job Name, Submitted By, Submitted, Started, Next Scheduled Run, Type, and Cron Trigger ID. The jobs listed are: Daily Inventory Sync (Submitted by kumar_manoj), Loyalty_Status_Update_Flow-1 (Submitted by kumar_manoj), Metalytics Data Loader Job for Org : 00DgK000006WMwP (Submitted by User Integration), Program Milestone Computation Cron Job (Submitted by Process, Automated), and Program Status Update Cron Job (Submitted by Process, Automated).

Action	Job Name	Submitted By	Submitted	Started	Next Scheduled Run	Type	Cron Trigger ID
Manage Del Pause Job	Daily Inventory Sync	kumar_manoj	7/11/2025, 7:23 AM		7/12/2025, 12:00 AM	Scheduled Apex	08egK0000079JG
Del	Loyalty_Status_Update_Flow-1	kumar_manoj	7/11/2025, 7:18 AM		7/12/2025, 12:00 AM	Scheduled Flow	08egK0000079Fzv
Del	Metalytics Data Loader Job for Org : 00DgK000006WMwP	User Integration	6/30/2025, 11:20 PM	7/11/2025, 12:27 AM	7/12/2025, 12:27 AM	Autonomous Data Loader Job	08egK000006HKq9
	Program Milestone Computation Cron Job	Process, Automated	6/30/2025, 11:20 PM	7/11/2025, 7:00 AM	7/11/2025, 11:59 AM	Program Milestone Computation Cron Job	08egK000006HKq7
	Program Status Update Cron Job	Process, Automated	6/30/2025, 11:20 PM	7/11/2025, 5:01 AM	7/11/2025, 8:00 PM	Program Status Update Cron Job	08egK000006HKq8

Phase 5: Deployment, Documentation & Maintenance

- Deployed using Change Sets
- GitHub repository created for version control
- Batch job scheduled daily at midnight
- Error handling with system debug logs

Conclusion:

This Salesforce CRM implementation for HandsMen Threads successfully centralizes product, order, and customer data. With powerful automation and structured data relationships, the system enhances operational efficiency and strengthens customer engagement. Each module — from order handling to loyalty tracking — reflects best practices in Salesforce architecture.

Future Enhancements:

- Integrate Einstein Prediction Builder to forecast customer churn
- Build chatbot support using Omni-Channel
- Add Lightning Web Components (LWC) for UI enhancements
- Implement product recommendation engine using AI