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# HandsMen Threads

## Salesforce Project Documentation

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## Table of Contents

|   |   |
|---|---|
| HandsMen Threads .....  | 1 |
| Salesforce Project Documentation .....                              | 1 |
| 1. Project Overview .....   | 3 |
| 2. Objectives & Use Case Summary .....                              | 3 |
| 3. Phase 1: Requirement Analysis & Planning .....                   | 3 |
| 4. Phase 2: Salesforce Development - Backend & Configurations ..... | 4 |
| 5. Phase 3: UI/UX Development & Customization .....                 | 4 |
| 6. Phase 4: Data Migration, Testing & Security .....                | 4 |
| 7. Phase 5: Deployment, Documentation & Maintenance .....           | 5 |
| 8. Skills & Learning Outcomes .....                                 | 5 |
| 9. Project Structure & System Requirements .....                    | 5 |
| 10. Final Remarks .....   | 6 |

## 1. Project Overview

HandsMen Threads, a forward-thinking fashion industry brand, is undertaking a significant digital transformation through the implementation of a Salesforce-based CRM system. This project is strategically focused on creating a robust and scalable platform to enhance data management, deepen customer relationships, and streamline internal operations. The core of this initiative lies in leveraging powerful automation and ensuring the seamless integration of key business workflows. The ultimate goal is to transition HandsMen Threads into an organization that operates on data-driven insights, automated processes, and delivers a highly personalized and engaging customer experience, thereby gaining a competitive edge in the market.

## 2. Objectives & Use Case Summary

The primary objective is to build a centralized, automated, and intelligent CRM platform. This will be achieved by focusing on three main pillars:

- **Build a Robust Custom Data Model:** To create a solid foundation for storing and managing all business-critical information, including customer data, orders, and inventory.
- **Ensure Data Integrity:** To implement rules and processes directly within the Salesforce UI that guarantee the accuracy, consistency, and reliability of data.
- **Automate and Streamline Processes:** To automate manual tasks related to customer and inventory management, freeing up resources and improving efficiency.

### Key Business Automations:

- **Automated Order Confirmations:** Upon order placement, the system will instantly trigger and send a real-time email notification to the customer. This enhances customer engagement and provides immediate confirmation and peace of mind.
- **Dynamic Loyalty Program:** To foster customer retention, a dynamic loyalty program will be established. A customer's loyalty status (e.g., Gold, Silver, Bronze) will be automatically calculated and updated based on their purchase history and other engagement metrics.
- **Proactive Stock Alerts:** To prevent stockouts and ensure inventory availability, the system will automatically dispatch an email alert to the warehouse team whenever the stock quantity for any product falls below a predefined threshold of 5 units.
- **Scheduled Bulk Order Updates:** An asynchronous process is scheduled to execute daily at midnight. This automated job will handle the processing of bulk orders, update related financial data, and reconcile inventory levels, ensuring data accuracy across the system without manual intervention.

## 3. Phase 1: Requirement Analysis & Planning

- **Understanding Business Requirements:** This initial phase focuses on a deep dive into the user needs and the specific business problems being addressed. This includes challenges like inefficient manual data entry, lack of real-time inventory visibility, and inconsistent customer communication.

- **Defining Project Scope and Objectives:** The project's boundaries are clearly defined. The scope includes the development of custom objects for orders, products, and loyalty programs, along with the implementation of the key automations listed above. The objectives are tied directly to business value, such as improved customer satisfaction and operational efficiency.
- **Design Data Model and Security Model:** A comprehensive data model will be designed and architected, outlining the custom objects, fields, and relationships needed to support the business processes. Concurrently, a security model will be designed to ensure that users have appropriate access to data based on their roles and responsibilities within the organization.

#### 4. Phase 2: Salesforce Development - Backend & Configurations

- **Environment Setup & DevOps Workflow:** This involves configuring the Salesforce development and testing environments (sandboxes) and establishing a workflow for development, testing, and deployment.
- **Customization (Objects, Fields, Validation Rules, Automation):**
  - **Custom Objects & Fields:** Creation of the custom objects (e.g., Order\_\_c, Product\_\_c, Loyalty\_Status\_\_c) and the fields required to store the necessary data.
  - **Validation Rules:** Implementation of rules to enforce data integrity at the point of entry.
  - **Automation:** Building the core automation using Salesforce Flows for processes like order confirmation and low-stock alerts.
- **Apex Development (Classes, Triggers, Asynchronous Apex):**
  - **Apex Triggers:** Custom Apex triggers will be developed for complex logic that cannot be handled by Flows.
  - **Asynchronous Apex:** The daily bulk order update process will be built using a Scheduled Apex class, which runs independently in the background.

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

- **Lightning App Setup:** A dedicated "HandsMen Threads" Lightning App will be created via the App Manager to provide users with a tailored and intuitive interface, containing all relevant tabs and components.
- **Page Layouts & Dynamic Forms:** User-friendly page layouts will be designed for all custom and standard objects. Dynamic Forms will be leveraged to display relevant fields and sections based on specific criteria, simplifying the user experience.
- **User Management:** Configuration of Profiles, Roles, and Permission Sets to manage user access and permissions within the app.
- **Reports and Dashboards:** A suite of reports and dashboards will be created to provide real-time analytics and actionable insights into sales performance, inventory levels, and customer loyalty trends.

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

- **Data Migration:** A plan for migrating existing data (e.g., product catalogs, customer lists) into the new Salesforce system will be executed using tools like the Data Import Wizard or Data Loader.
- **Data Quality & Security Implementation:**
  - **Field History Tracking:** Enabled on critical fields to audit and track changes over time.
  - **Duplicate & Matching Rules:** Configured to prevent the creation of duplicate records and maintain a clean database.
  - **Security Model Implementation:** The designed security model (Profiles, Roles, Permission Sets, Sharing Rules) will be fully configured.
- **Testing:**
  - **Test Classes:** Comprehensive Apex test classes will be written to ensure at least 75% code coverage for all custom Apex code.
  - **Test Cases:** Detailed test cases will be prepared and executed for every feature, flow, and trigger to ensure they function as expected. This includes providing input and output screenshots for validation.

## 7. Phase 5: Deployment, Documentation & Maintenance

- **Deployment Strategy:** The deployment from the sandbox environment to the live production environment will be managed using a structured approach, such as Change Sets or a more advanced DevOps tool.
- **Maintenance & Monitoring:** A plan will be established for the ongoing maintenance and monitoring of the system, including checking the status of automated jobs and reviewing system logs.
- **Documentation & Troubleshooting:** The final project documentation will be completed, and a troubleshooting guide will be created to help users and administrators resolve common issues.

## 8. Skills & Learning Outcomes

This project serves as a practical, hands-on learning experience, equipping participants with the following skills:

- **Skills Required:** Salesforce Development, Salesforce Apex, Salesforce Lightning Components & Flows.
- **What You'll Learn:** Data Modelling, Data Quality Maintenance, Lightning App Builder, Record-Triggered Flow Design, Apex Programming (Triggers), and Asynchronous Apex (Batch & Scheduled Jobs).

## 9. Project Structure & System Requirements

- **Project Structure:** The project is managed using an agile framework, broken down into **16 Epics** and **35 Stories**.
- **System Requirements:**

- **Supported Browsers:** Google Chrome (Recommended), Mozilla Firefox, Microsoft Edge, Safari.
- **OS Compatibility:** Windows 8/10/11, macOS (Latest), Linux, ChromeOS.
- **Hardware:** Minimum Intel Core i3 with 4GB RAM. Recommended Intel Core i5/i7 with 8GB+ RAM and an SSD.
- **Network:** Stable broadband connection ( $\geq 30$  Mbps) with no VPN restrictions blocking Salesforce access.

### 10. Final Remarks

The successful completion of the HandsMen Threads Salesforce project will mark a pivotal step in the company's journey toward operational excellence. It will provide the brand with a powerful, centralized system for managing its core business, leading to more informed decision-making, enhanced operational efficiency, and a deeply personalized customer experience. This project provides invaluable, real-world exposure to advanced Salesforce tools and automation strategies.