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Documentation

HANDSMEN THREADS – CAPSTONE PROJECT

Phase 1: REQUIREMENT ANALYSIS & PLANNING

During this stage of the Handsmen Threads SkillWallet capstone project, the team concentrated on grasping the project's purposes, user requirements, and system specifications. In-depth research and discussions took place to pinpoint the crucial features, including user authentication, skill verification, and portfolio management. The team also developed a project plan that detailed the scope, timeline, and responsibilities to maintain an organized development process. This phase laid the groundwork for the project, ensuring that all requirements were clearly defined and attainable before progressing to design and implementation.

The screenshot shows the Salesforce Object Manager interface for editing a custom object named 'Inventory'. The page is titled 'Custom Object Definition Edit' and includes a 'Save' button. The 'Custom Object Information' section contains the following fields:

- Label:** 'Inventory' (Example: Account)
- Plural Label:** 'Inventories' (Example: Accounts)
- Starts with vowel sound:** ☐
- Object Name:** 'Inventory' (Example: Account)
- Description:** (Empty text area)
- Context Sensitive Help Setting:** ☒ Open the standard Salesforce.com Help & Training window; ☐ Open a window using a Visualforce page
- Context Name:** (Empty text field)

The 'Enter Record Name Label and Format' section includes:

- Record Name:** 'Inventory Number' (Example: Account Name)
- Data Type:** 'Auto Number' (Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.)
- Display Format:** '1-0000' (Example: A-0000) What is This?
- Starting Number:** '001'

The 'Optional Features' section has the following checkboxes:

- ☒ Allow Reports
- ☐ Allow Activities
- ☐ Track Field History
- ☐ Allow in Chatter Groups
- ☐ Enable Licensing (i)

The bottom of the page shows a 'Go Mobile' button and a system clock indicating 7:43 PM.

Setup

Home

Object Manager

Q tabs

User Interface

Rename Tabs and Labels

Tabs

Didn't find what you're looking for? Try using Global Search.

SETUP

Tabs

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs

New What Is This?

Action	Label	Tab Style	Description
Edit	Doi		People

Web Tabs

New What Is This?

No Web Tabs have been defined.

Visualforce Tabs

New What Is This?

No Visualforce Tabs have been defined.

Lightning Component Tabs

New What Is This?

Action	Label	Tab Style	Description
Edit	Get Started with ApexForce		Apex
Edit	Get Started with Data Cloud		Data
Edit	Get Started with MuleSoft		Mule
Edit	Get Started with Salesforce DX		DX
Edit	Welcome		Welcome

Lightning Page Tabs

New What Is This?

No Lightning Page Tabs have been defined.

Setup

Home

Object Manager

Q tabs

User Interface

Rename Tabs and Labels

Tabs

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SETUP

Tabs

New Custom Object Tab

Step 1: Enter the Details

Step 1 of 3

Choose the custom object for this new custom tab. Fill in other details.

New Custom Object Tab

Required Information

Select an existing custom object or [create a new custom object now](#).

Object

HandsMen Product

Tab Style

Box

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

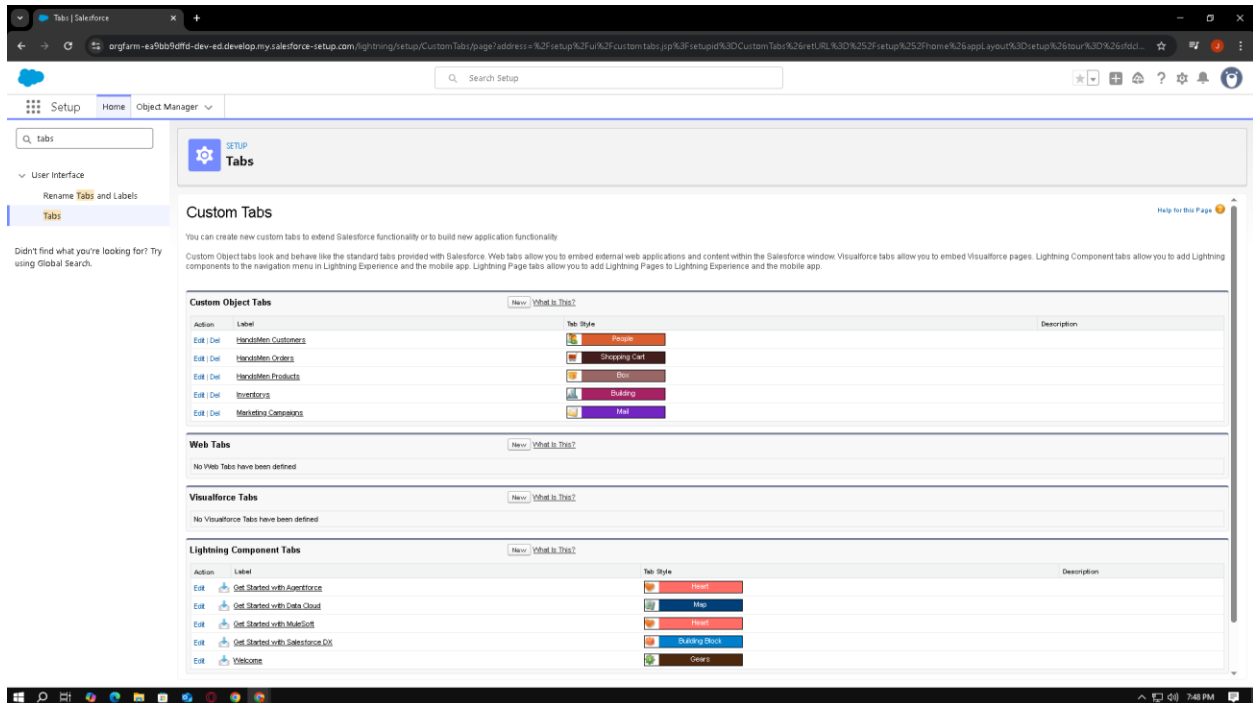
Splash Page Custom Link

None

Enter a short description.

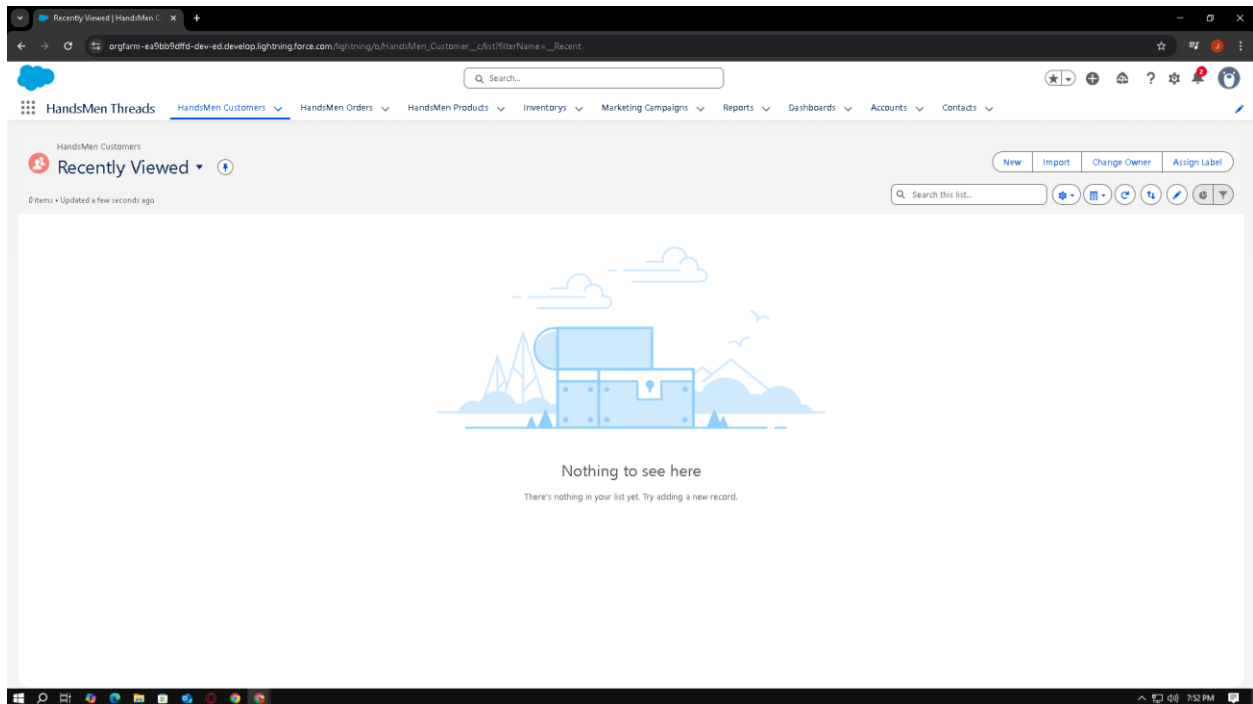
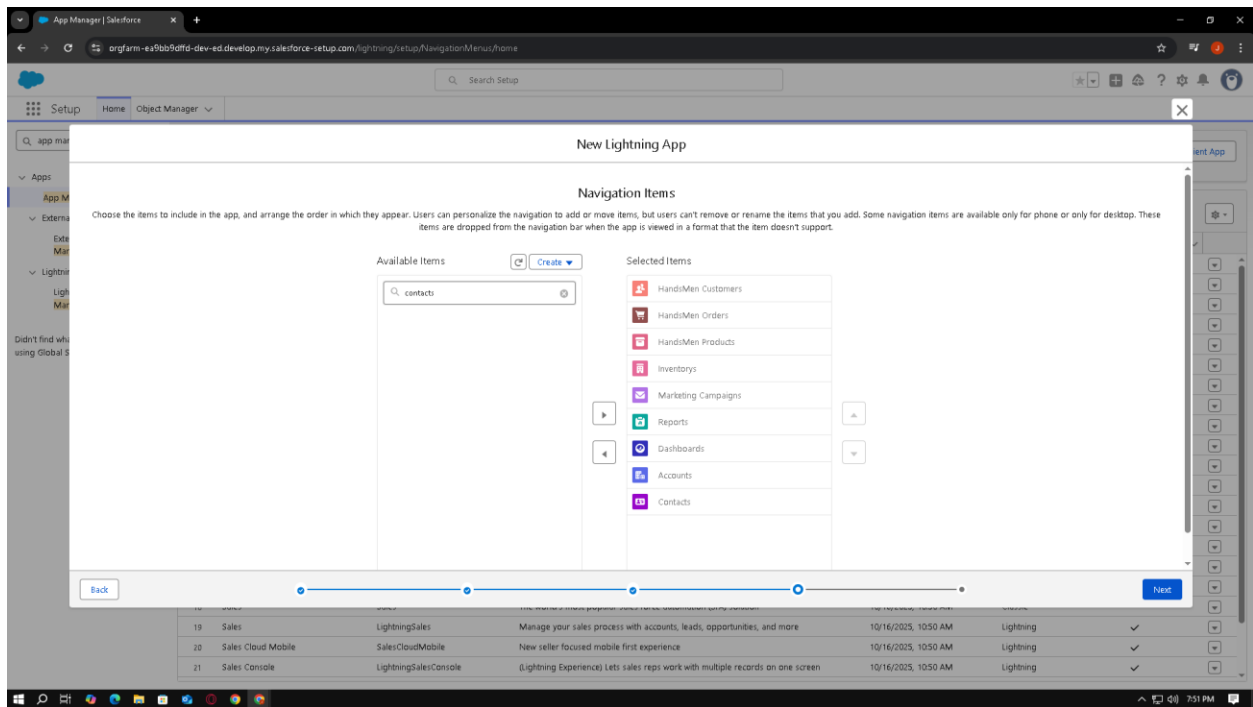
Description

[Next](#) [Cancel](#)



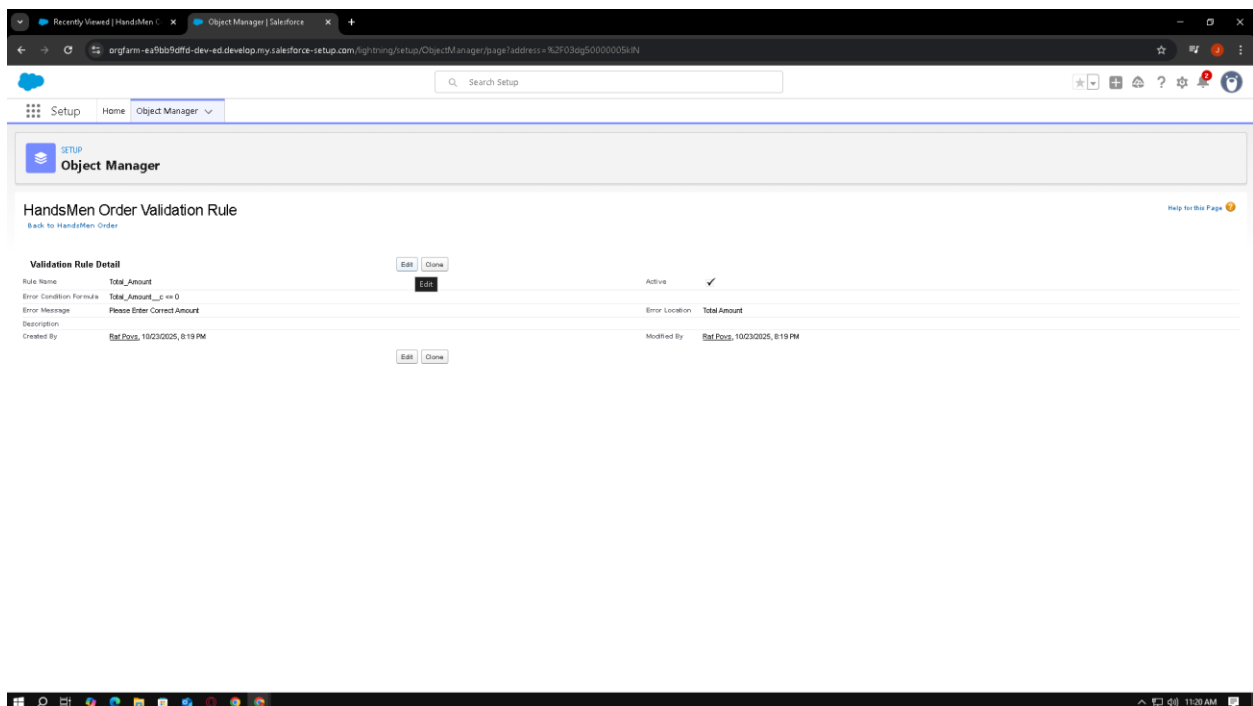
Phase 2: Salesforce Development – Backend & Configurations

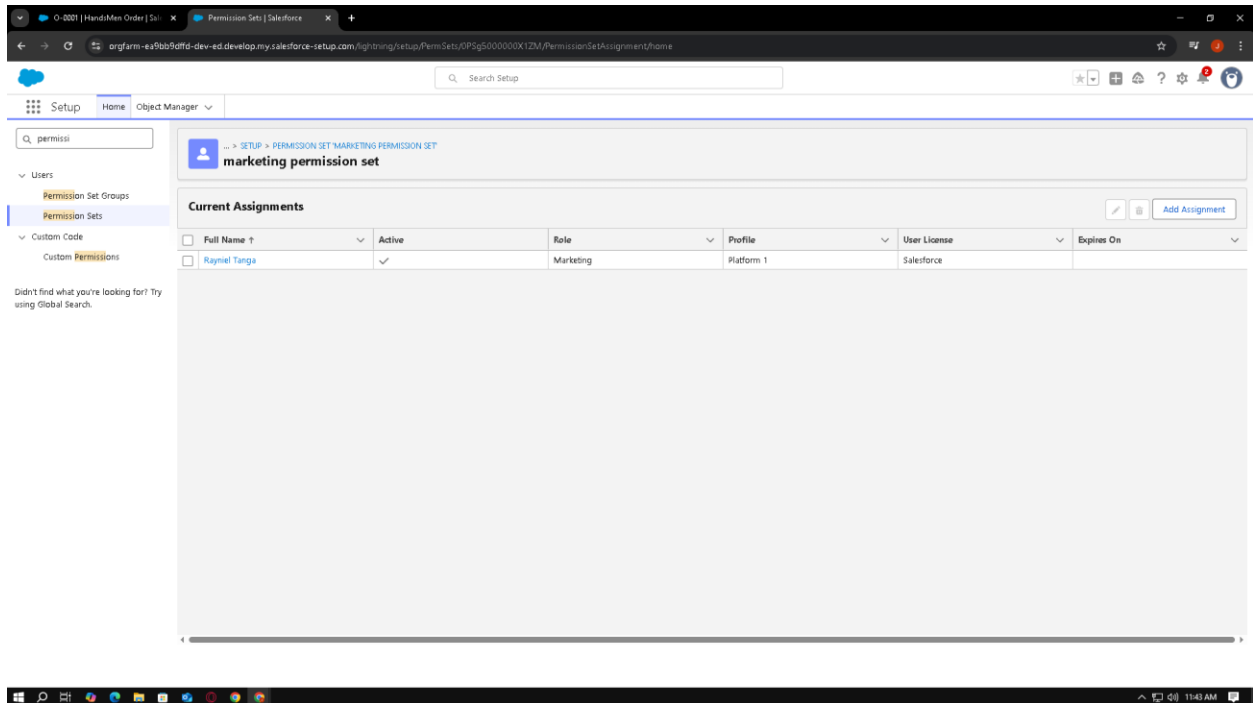
During this phase, the Handsmen Threads SkillWallet team concentrated on developing the backend infrastructure and setting up the Salesforce environment. The development process commenced by configuring the environment and creating a DevOps workflow for seamless deployment. Custom objects, fields, validation rules, and automation tools—such as Workflow Rules, Process Builder, Flows, and Approval Processes—were established to enhance business operations. Apex Classes and Triggers were created to manage complex logic and efficiently automate backend processes. This phase ensured the system’s foundation was sturdy, functional, and in line with project specifications.



Phase 3: UI/UX Development & Customization

During this phase, the HandsMen Threads SkillWallet team concentrated on building a user-friendly and intuitive interface within Salesforce. The Lightning App was established and tailored through the App Manager to align with the project's workflow. Page Layouts and Dynamic Forms were crafted to improve user experience and facilitate easy access to critical information. Features for user management were set up to regulate roles and permissions. Furthermore, Reports and Dashboards were created to depict essential project data and performance indicators. Lightning Pages were refined for a smooth and contemporary interface, and any developed Lightning Web Components (LWCs) provided interactive functionality to create a more engaging user experience.





Phase 4 & 5: Data Migration, Testing, Security, Deployment, Documentation & Maintenance

During the concluding stages of the Handsmen Threads SkillWallet initiative, the emphasis shifted towards guaranteeing data precision, system safety, and reliable deployment. In Phase 4, data was transferred utilizing tools such as the Data Import Wizard and Data Loader for efficient record population. To uphold data integrity, Field History Tracking, Duplicate Rules, and Matching Rules were established. User access was safeguarded through well-defined Profiles, Roles, Role Hierarchies, Permission Sets, and Sharing Rules.

In Phase 5, the team implemented the deployment plan with Change Sets, ensuring a seamless transition from the development environment to production. Comprehensive project documentation was created, encompassing troubleshooting procedures and maintenance strategies to facilitate future updates and oversight.

