

HandsMen Threads: Elevating the Art of Sophistication in Men's Fashion - Salesforce Capstone Project Documentation

PROJECT OVERVIEW

This project presents the implementation of a customized Salesforce CRM for **[HandsMen Threads: Elevating the Art of Sophistication in Men's Fashion]**, an organization in the **[Business]** sector. CRM centralizes customer, product, transactions, and operational data to streamline workflows, automate business processes, and enhance customer satisfaction.

OBJECTIVES

Improve data accuracy and consistency through validation and automation. -Streamline business processes such as **[e.g., bookings, orders, services]**. Enhance customer experience through automated notifications. - Provide management with real-time insights through dashboards and reports.

PHASE 1: REQUIREMENT ANALYSIS & PLANNING

1. Understanding Business Requirements

- Keep customer records up to date, including accurate contact information and loyalty status.
- Oversee product catalogs and ensure real-time visibility of inventory levels.
- Automate order confirmations and send customer notifications such as email alerts.
- Alert the warehouse team when stock levels drop to critical thresholds.
- Run bulk order processing every midnight to refresh financial data and inventory counts.

- Ensure Sales users have secure, properly managed access through appropriate permission settings.

2. Project Scope and Objectives

In Scope:

- Building five custom objects to support data storage needs.
- Using Flows and Apex to automate key business processes.
- Applying validation rules to maintain data integrity.
- Creating reports and dashboards to provide management visibility.
- Setting up security controls through profiles, permission sets, and role hierarchies.
- Running nightly batch operations.

Out of Scope:

- Integrations with external platforms or services.
- Development of custom storefronts or e-commerce features.

3. Data Model & Security Model Design

- Entity Relationship Diagram (ERD)

4. Stakeholder Mapping

Stakeholder	Role	Responsibilities
Project Sponsor	Executive	Approves overall CRM vision
Sales Team	End Users	Manage customers, orders
Warehouse Manager	Ops	Receives low stock alerts
Salesforce Admin	Builder	Designs, builds, and configures the CRM

5. Execution Roadmap

Phase 1: Architecture & Planning

- Configure objects, fields, relationships, and formula fields.

- Set up validation rules, build flows, and develop Apex triggers and batch processes.
- Create email templates for system notifications and customer-facing messages.

Phase 2: Development

- Create custom objects and fields as needed.
- Build automations using flows, process builders, and Apex triggers.
- Configure data security settings and sharing access.
- Set up email templates and notification workflows.

Phase 3: Testing and Q&A

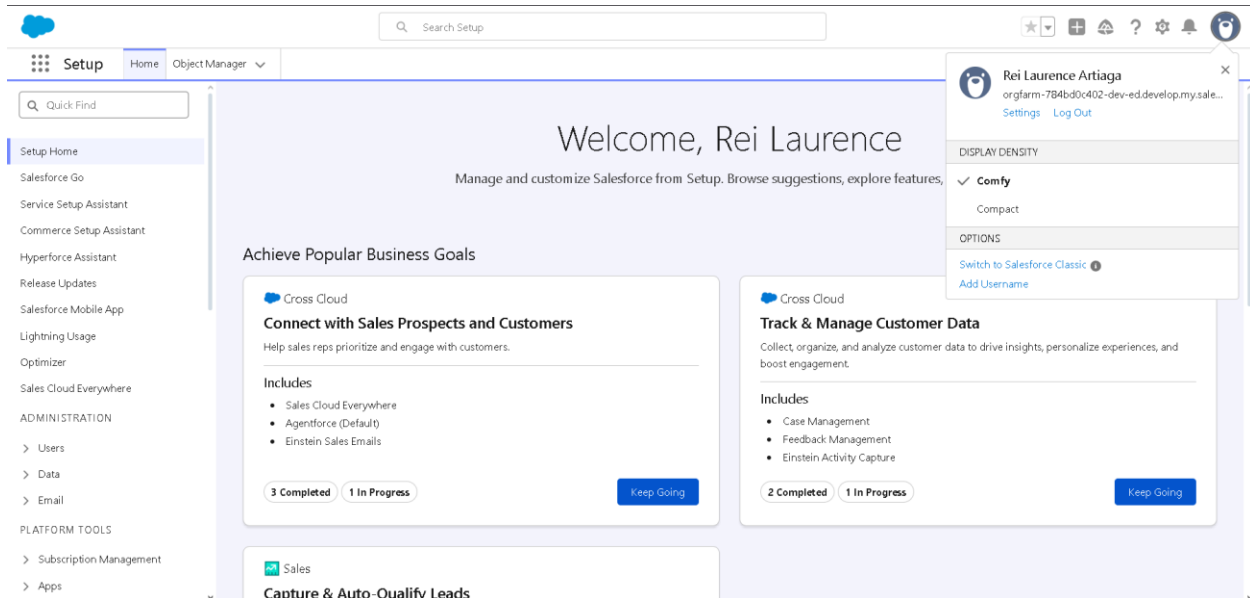
- Conduct unit tests for objects and automated processes.
- Perform end-to-end testing using sample datasets.
- Run performance evaluations and carry out security assessments.

Phase 4: Deployment & Training

- Move the solution to the production environment.
 - Provide user training on the newly implemented features.
 - Offer post-launch support and ongoing system monitoring
-

PHASE 2: SALESFORCE DEVELOPMENT – BACKEND & CONFIGURATIONS

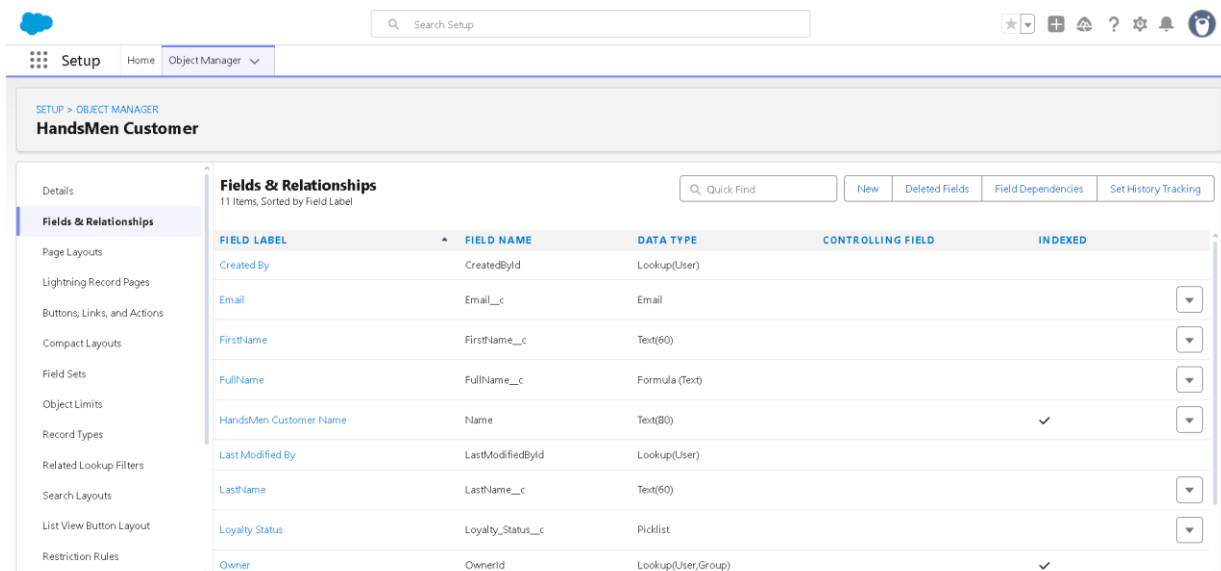
1. Environment Setup & DevOps Workflow



2. Customization (Objects, Fields, Validation Rules, Automation)

Objects & Fields Setup

- **HandsMen Customer** – Stores customer details and profiles to support interaction and order tracking.



- **HandsMen Product** – Holds information about all products offered by HandsMen Threads.

Setup Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
HandsMen Product

Details

Fields & Relationships
7 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
HandsMen Product Name	Name	Text(80)		✓
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Price	Price__c	Currency(18, 0)		
SKU	SKU__c	Text(60)		
Stock Quantity	Stock_Quantity__c	Number(18, 0)		

Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules

- **HandsMen Order** – Captures customer purchase records along with their order statuses.

Setup Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
HandsMen Order

Details

Fields & Relationships
10 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Customer Email	Customer_Email__c	Email		
HandsMen Customer	HandsMen_Customer__c	Lookup(HandsMen Customer)		✓
HandsMen Product	HandsMen_Product__c	Lookup(HandsMen Product)		✓
HandsMenHandsMen OrderNumber Order Name	Name	Auto Number		✓
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Quantity	Quantity__c	Number(18, 0)		
Status	Status__c	Picklist		

Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules

- **Inventory** – Tracks stock quantities and product availability.

The screenshot shows the Salesforce Setup interface for the 'Inventory' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, and Lightning Record Pages. The main content area is titled 'Fields & Relationships' and displays a table of 7 fields, sorted by Field Label. The table includes columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status. Fields listed include Created By, HandsMen Product, Inventory Number, Last Modified By, Stock Quantity, Stock Status, and Warehouse.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
HandsMen Product	HandsMen_Product__c	Master-Detail(HandsMen Product)		✓
Inventory Number	Name	Auto Number		✓
Last Modified By	LastModifiedById	Lookup(User)		
Stock Quantity	Stock_Quantity__c	Number(18, 0)		
Stock Status	Stock_Status__c	Formula (Text)		
Warehouse	Warehouse__c	Text(60)		

- **Marketing Campaign** – Manages promotional initiatives and monitors customer engagement activities.

The screenshot shows the Salesforce Setup interface for the 'Marketing Campaign' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, and Lightning Record Pages. The main content area is titled 'Fields & Relationships' and displays a table of 7 fields, sorted by Field Label. The table includes columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status. Fields listed include Created By, End Date, HandsMen Customer, Last Modified By, Marketing Campaign Number, Owner, and Start Date.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
End Date	End_Date__c	Date		
HandsMen Customer	HandsMen_Customer__c	Lookup(HandsMen Customer)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Marketing Campaign Number	Name	Auto Number		✓
Owner	OwnerId	Lookup(User,Group)		✓
Start Date	Start_Date__c	Date		

Validation Rules Created

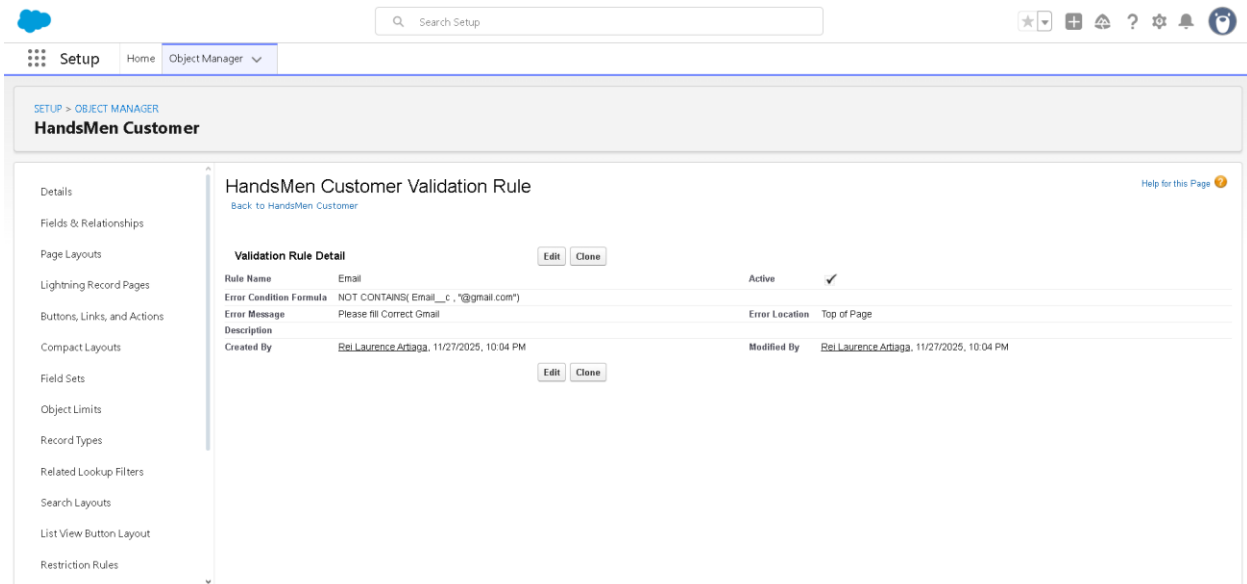
Examples:

- **Valid Email Format**

Object: HandsMen Customer__c

Field: Email

Validation Rule: NOT CONTAINS(Email, "@gmail.com")



The screenshot shows the Salesforce Setup interface. The top navigation bar includes the Setup icon, a search bar, and various utility icons. The main navigation menu on the left lists various setup options, with 'Object Manager' selected. The breadcrumb trail indicates the path: SETUP > OBJECT MANAGER > HandsMen Customer. The main content area displays the 'HandsMen Customer Validation Rule' configuration page. The rule is named 'HandsMen Customer Validation Rule' and is currently active. The configuration details are as follows:

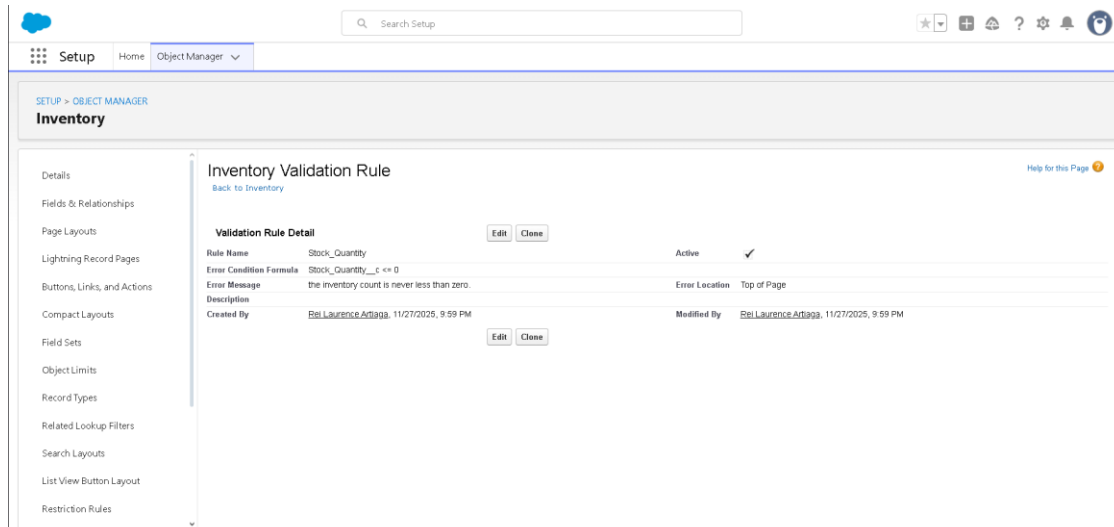
Validation Rule Detail		Active
Rule Name	Email	✓
Error Condition Formula	NOT CONTAINS(Email__c , "@gmail.com")	
Error Message	Please fill Correct Gmail	Error Location: Top of Page
Description		
Created By	Bel Laurence Arriaga, 11/27/2025, 10:04 PM	Modified By: Bel Laurence Arriaga, 11/27/2025, 10:04 PM

- **Stocks cannot be negative**

Object: Inventory__c

Field: Stock_Quantity__c

Validation Rule: Stock_Quantity__c <= 0



The screenshot shows the Salesforce Setup interface for the 'Inventory' object. The breadcrumb trail indicates the path: SETUP > OBJECT MANAGER > Inventory. The main content area displays the 'Inventory Validation Rule' configuration page. The rule is named 'Inventory Validation Rule' and is currently active. The configuration details are as follows:

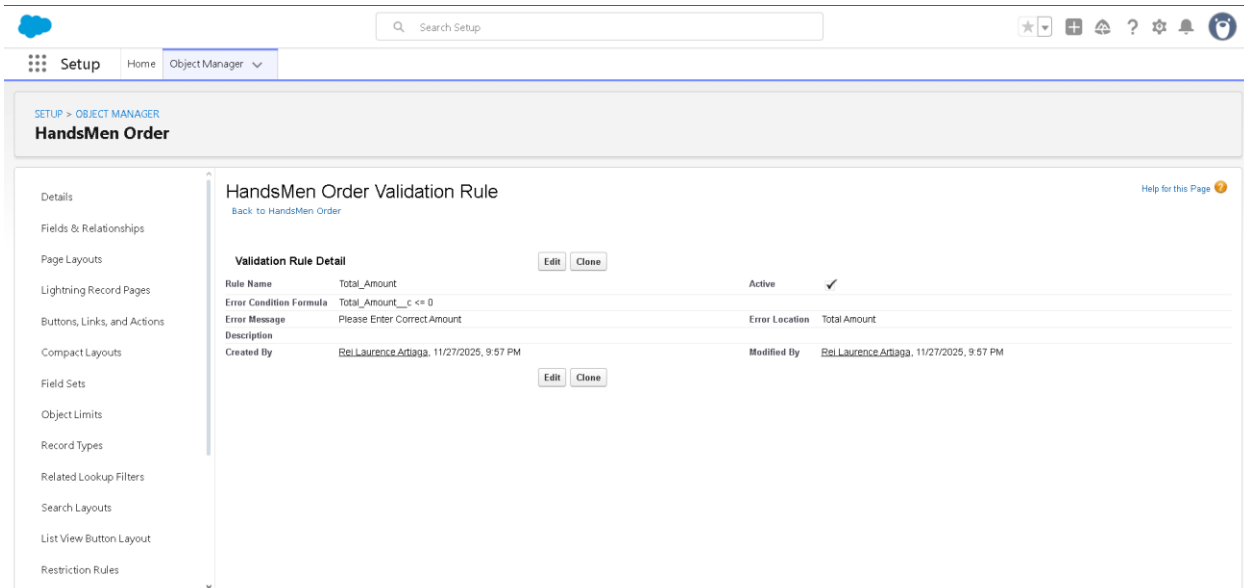
Validation Rule Detail		Active
Rule Name	Stock_Quantity	✓
Error Condition Formula	Stock_Quantity__c <= 0	
Error Message	the inventory count is never less than zero.	Error Location: Top of Page
Description		
Created By	Bel Laurence Arriaga, 11/27/2025, 9:59 PM	Modified By: Bel Laurence Arriaga, 11/27/2025, 9:59 PM

- **Correct Order Amount**

Object: HandsMen Order__c

Field: Total_Amount__c

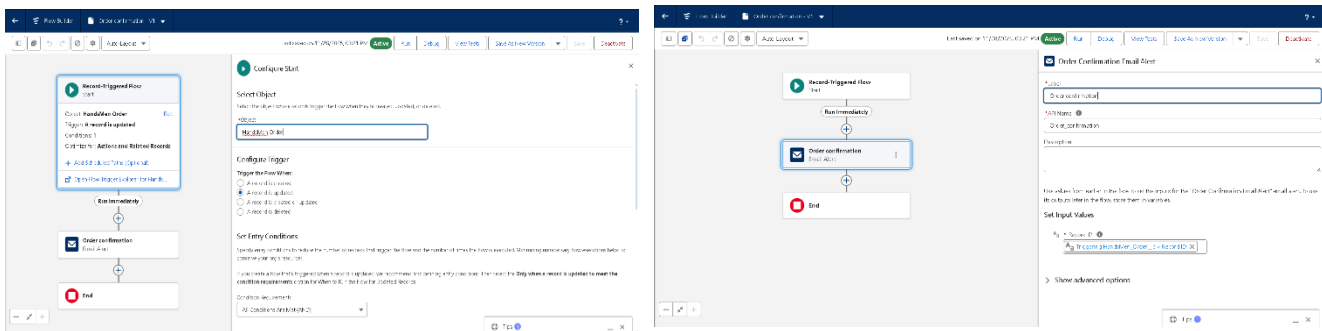
Validation Rule: Total_Amount__c <= 0



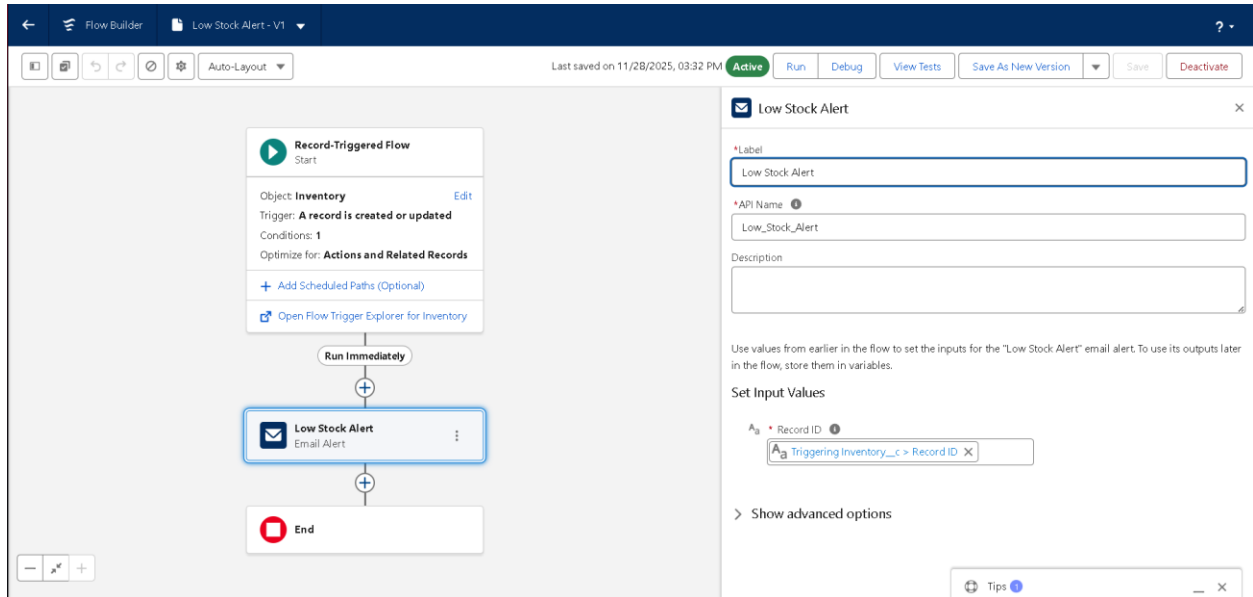
Automation Tools Used

Flows implemented

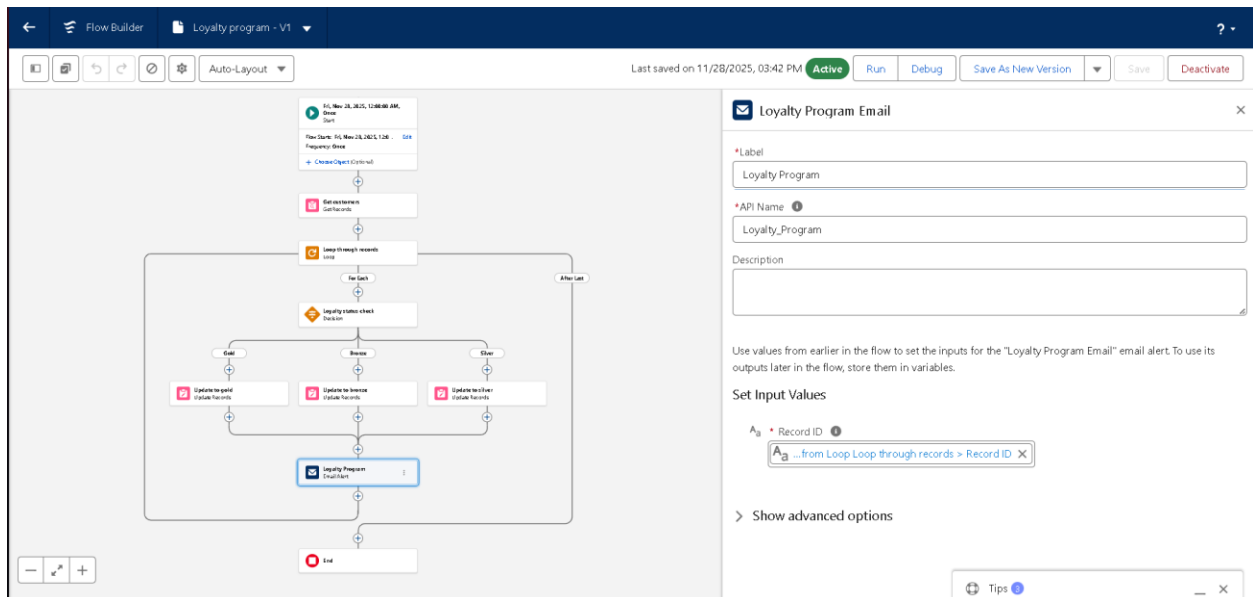
1. Order Confirmation Flow – Sends email when order is confirmed



2. Stock Alert Flow – Triggers email when stock < 5



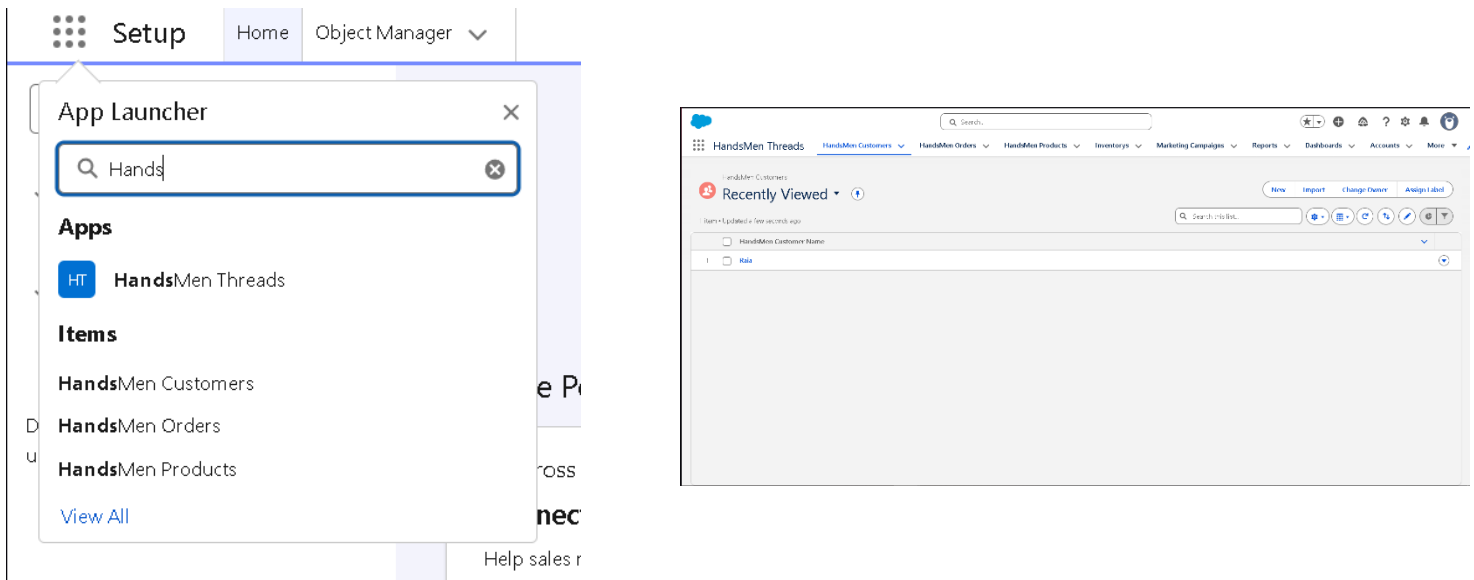
3. Loyalty Status Update (Scheduled Flow) – Runs at midnight



PHASE 3: UI/UX DEVELOPMENT & CUSTOMIZATION

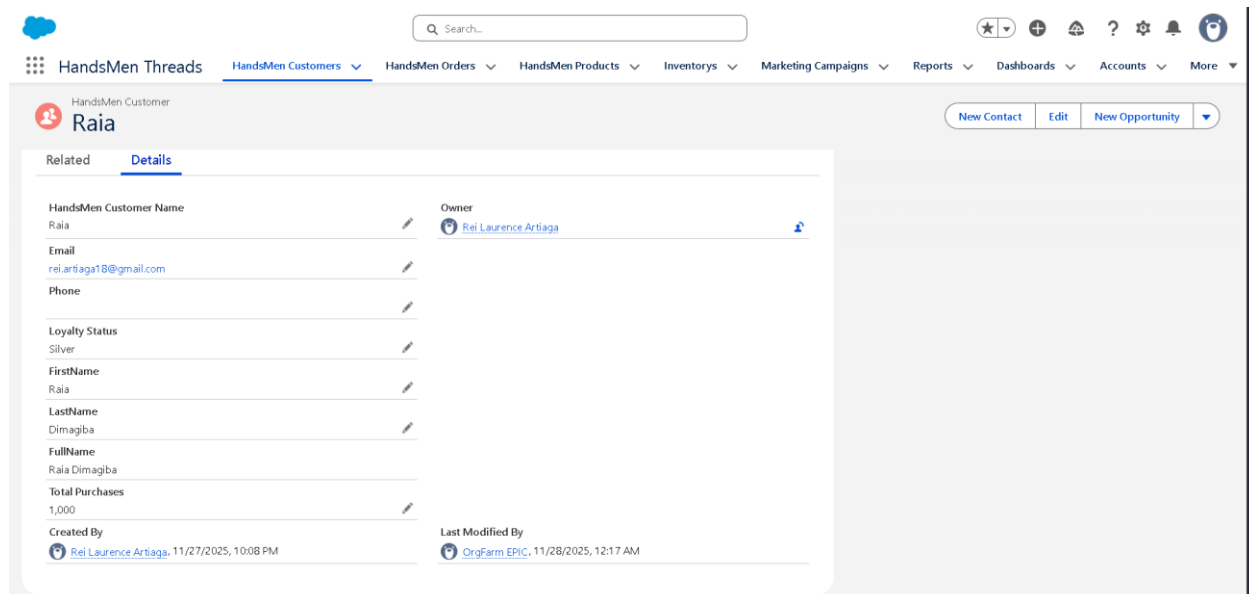
1. Lightning App Setup

App Name: HandsMen Threads – Features navigation tabs for managing customers, orders, inventory, and products.



2. Page Layouts & Dynamic Forms

- **Customer Info** – Displays key customer details, including name, email, loyalty status, and total purchase value.



- **Loyalty Summary** – Displays the customer’s loyalty tier (Bronze, Silver, or Gold) based on their total purchase amount.

The screenshot shows the 'HandsMen Customer' page for a user named 'Raia'. The page has a top navigation bar with a search bar and various icons. Below the navigation bar, there's a sub-navigation bar with tabs: 'HandsMen Threads', 'HandsMen Customers' (selected), 'HandsMen Orders', 'HandsMen Products', 'Inventorys', 'Marketing Campaigns', 'Reports', 'Dashboards', 'Accounts', and 'More'. The main content area is titled 'HandsMen Customer Raia' and includes buttons for 'New Contact', 'Edit', and 'New Opportunity'. The 'Details' tab is active, showing a form with the following fields:

- HandsMen Customer Name:** Raia
- Email:** rei.ariaga18@gmail.com
- Phone:**
- Loyalty Status:** Silver
- FirstName:** Raia
- LastName:** Dimagiba
- FullName:** Raia Dimagiba
- Total Purchases:** 1,000
- Created By:** Rei Laurence Ariaga, 11/27/2025, 10:08 PM
- Last Modified By:** OrgFarm EPIC, 11/28/2025, 12:17 AM

- **Order Items** – list of orders

The screenshot shows the 'HandsMen Orders' page. The top navigation bar is the same as the previous screenshot. The sub-navigation bar has tabs: 'HandsMen Threads', 'HandsMen Customers', 'HandsMen Orders' (selected), 'HandsMen Products', 'Inventorys', 'Marketing Campaigns', 'Reports', 'Dashboards', 'Accounts', and 'More'. The main content area is titled 'HandsMen Orders' and includes buttons for 'New', 'Import', 'Change Owner', and 'Assign Label'. Below the buttons, there's a search bar and a list of 5 items. The list has columns for 'HandsMen OrderNumber' and 'Order Name'. The items are:

	HandsMen OrderNumber	Order Name
1	O-0005	
2	O-0004	
3	O-0003	
4	O-0002	
5	O-0001	

3. User Management

Users: Kol Mickaelson, Niklaus Mickaelson (I just added Michael Mickaelson)

Setup

Home

Object Manager

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector

Users

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

Search Setup

Star

Plus

Cloud

Help

Settings

Notifications

Profile

SETUP

Users

All Users

Help for this Page

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. [Let's Go](#)

View: All Users

Edit

Create New View

A

B

C

D

E

F

G

H

I

J

K

L

M

N

O

P

Q

R

S

T

U

V

W

X

Y

Z

Other

All

New User

Reset Password(s)

Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Edit Ariaga, Rei Laurence	rei	rei.ariaga18898@agentforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Edit Chatter Expert	Chatter	chatty.00dd000000agbvuas.tbeyz1yvet@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Edit EPIC_OrgFarm	DEPIC	epic.02104e407949@orgfarm.salesforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Edit Mickaelson, Kol	kmika	rei.ariaga181921@gmail.com	Inventory	<input type="checkbox"/>	Platform_1
<input type="checkbox"/>	Edit Mickaelson, Michael	mmika	rei.ariaga181922@gmail.com	Marketing	<input checked="" type="checkbox"/>	Platform_1
<input type="checkbox"/>	Edit Mickaelson, Niklaus	nmika	rei.ariaga181920@gmail.com	Sales	<input checked="" type="checkbox"/>	Platform_1
<input type="checkbox"/>	Edit User_Integration	integ	integration@00dd000000agbvuas.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	Edit User_Security	sec	insightssecurity@00dd000000agbvuas.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

New User

Reset Password(s)

Add Multiple Users

A

B

C

D

E

F

G

H

I

J

K

L

M

N

O

P

Q

R

S

T

U

V

W

X

Y

Z

Other

All

4. Reports & Dashboards

HandsMen Threads

HandsMen Customers

HandsMen Orders

HandsMen Products

Inventories

Marketing Campaigns

Reports

Dashboards

Accounts

More

REPORT

New HandsMen Customers Report

HandsMen Customers

Add Chart

Save & Run

Save

Close

Run

Previewing a limited number of records. Run the report to see everything.

Update Preview Automatically

HandsMen Customer: HandsMen Customer Name	HandsMen Customer: ID	Loyalty Status	Total Purchases	Email
1 Raia	a00dL0000275YH	Silver	1,000	rei.ariaga18@gmail.com
2			1,000	

Fields

Outline

Filters

Groups

GROUP ROWS

Add group...

Columns

Add column...

HandsMen Customer: HandsMen C

HandsMen Customer: ID

Loyalty Status

Total Purchases

Email

PHASE 4: DATA MIGRATION, TESTING & SECURITY

1. Security Settings

Profiles – Shows Platform 1 profile

Setup

Home

Object Manager

profile

Users

Profiles

Platform 1

Profile

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Login IP Ranges

 |

Enabled Apex Class Access

 |

Enabled Visualforce Page Access

 |

Enabled External Data Source Access

 |

Enabled Named Credential Access

 |

Enabled External Credential Principal Access

 |

Enabled Custom Metadata Type Access

 |

Enabled Custom Setting Definitions Access

 |

Enabled Flow Access

 |

Enabled Service Presence Status Access

 |

Enabled Custom Permissions

Profile Detail

Name

Platform 1

User License

Salesforce

Custom Profile

✓

Description

Created By

Bel Laurence Adiga, 11/27/2025, 10:52 PM

Modified By

Bel Laurence Adiga, 11/27/2025, 10:53 PM

Page Layouts

Standard Object Layouts

Global	<div>Global Layout</div> <div>View Assignment</div>	Location Group Assignment	<div>Location Group Assignment Layout</div> <div>View Assignment</div>
Email Application	<div>Not Assigned</div> <div>View Assignment</div>	Macro	<div>Macro Layout</div> <div>View Assignment</div>
Home Page Layout	<div>Home Page Default</div> <div>View Assignment</div>	Object Milestone	<div>Object Milestone Layout</div> <div>View Assignment</div>
Account	<div>Account Layout</div> <div>View Assignment</div>	Operating Hours	<div>Operating Hours Layout</div> <div>View Assignment</div>
Alternative Payment Method	<div>Alternative Payment Method Layout</div> <div>View Assignment</div>	Opportunity	<div>Opportunity Layout</div> <div>View Assignment</div>

[illegible]

The screenshot displays the Salesforce Setup interface for Permission Sets. The top navigation bar includes the Setup icon, the word 'Setup', and tabs for 'Home' and 'Object Manager'. Below this is a search bar with the text 'perm'. The left sidebar shows a navigation menu with 'Users', 'Permission Set Groups', 'Permission Sets' (highlighted), 'Custom Code', and 'Custom Permissions'. The main content area is titled 'Permission Sets' and includes a sub-header 'SETUP' with a user icon. Below the title is a message: 'On this page you can create, view, and manage permission sets.' There are links for 'All Permission Sets', 'Edit', 'Delete', and 'Create New View'. A table lists various permission sets with columns for 'Action', 'Permission Set Name', 'Description', and 'License'. The table includes a 'Clone' button for each row. The bottom of the page shows pagination information: '1-25 of 97', '0 Selected', and 'Page 1 of 4'.

2. Test Classes

- Triggers – OrderTotalTrigger, StockDeductionTrigger, OrderTrigger

```
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
```

User	Application	Operation	Time	Status	Read	Size
Rei Laurence Artaga	Unknown	/services/data/v65...	11/28/2025, 4:44:11	Success	Unread	2.87 KB
Rei Laurence Artaga	Browser	/aura	11/28/2025, 4:41:11	Success	Unread	14.01 KB

```
25     inv.Stock_Quantity__c -= order.Quantity__c;
26     inventoriesToUpdate.add(inv);
27     break;
28   }
29   }
30   }
31   }
32
33   if (!inventoriesToUpdate.isEmpty()) {
34     update inventoriesToUpdate;
35   }
36
```

User	Application	Operation	Time	Status	Read	Size
Rei Laurence Artaga	Unknown	/services/data/v65...	11/28/2025, 4:44:11	Success	Unread	2.87 KB
Rei Laurence Artaga	Browser	/aura	11/28/2025, 4:41:11	Success	Unread	14.01 KB

```
1 global class InventoryBatchJob implements Database.Batchable<SObject>, Sched
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
13
```

User	Application	Operation	Time	Status	Read	Size
Rei Laurence Artaga	Unknown	/services/data/v65...	11/28/2025, 4:44:11	Success	Unread	2.87 KB
Rei Laurence Artaga	Browser	/aura	11/28/2025, 4:41:11	Success	Unread	14.01 KB

3. Testing Approach

1. Customer Creation

The screenshot shows a modal window titled "New HandsMen Customer" with a close button (X) in the top right corner. The form is labeled "Information" and includes a red asterisk indicating required information. The fields are: "HandsMen Customer Name" (text input), "Email" (text input), "Phone" (text input), "Loyalty Status" (dropdown menu with "None" selected), "FirstName" (text input), and "LastName" (text input). There is a "Total Purchases" field at the bottom left. The "Owner" is listed as "Re Laurence Artaga". At the bottom right are "Cancel", "Save & New", and "Save" buttons.

The screenshot shows the "Raia" customer details page. The page has a search bar at the top and a navigation menu with "HandsMen Customers", "HandsMen Orders", "HandsMen Products", "Inventorys", "Marketing Campaigns", "Reports", "Dashboards", "Accounts", and "More". The "Raia" customer is highlighted. The "Details" tab is active, showing a list of fields: "HandsMen Customer Name", "Email", "Phone", "Loyalty Status", "FirstName", "LastName", "FullName", "Last Purchases", "Created By", and "Last Modified By". The "Owner" is "Re Laurence Artaga". The "Created By" is "Re Laurence Artaga" and the "Last Modified By" is "Orlham DPC".

2. Products Creation

The screenshot shows a modal window titled "New HandsMen Product" with a close button (X) in the top right corner. The form is labeled "Information" and includes a red asterisk indicating required information. The fields are: "HandsMen Product Name" (text input), "SKU" (text input), "Price" (text input), and "Stock Quantity" (text input). The "Owner" is listed as "Re Laurence Artaga". At the bottom right are "Cancel", "Save & New", and "Save" buttons.

The screenshot shows the "T-shirt Cloth" product details page. The page has a search bar at the top and a navigation menu with "HandsMen Customers", "HandsMen Orders", "HandsMen Products", "Inventorys", "Marketing Campaigns", "Reports", "Dashboards", "Accounts", and "More". The "T-shirt Cloth" product is highlighted. The "Details" tab is active, showing a list of fields: "HandsMen Product Name", "SKU", "Price", "Stock Quantity", "Created By", and "Last Modified By". The "Owner" is "Re Laurence Artaga". The "Created By" is "Re Laurence Artaga" and the "Last Modified By" is "Re Laurence Artaga".

3. Order Creation & Status Update

The screenshot shows a modal window titled "New HandsMen Order" with a close button (X) in the top right corner. The form is labeled "Information" and includes a red asterisk indicating required information. The fields are: "HandsMen Order Number" (text input), "HandsMen Product" (text input with a search icon), "HandsMen Customer" (text input with a search icon), "Status" (dropdown menu with "None" selected), "Quantity" (text input), and "Total Amount" (text input). The "Owner" is listed as "Re Laurence Artaga". At the bottom right are "Cancel", "Save & New", and "Save" buttons.

The screenshot shows the "O-0005" order details page. The page has a search bar at the top and a navigation menu with "HandsMen Customers", "HandsMen Orders", "HandsMen Products", "Inventorys", "Marketing Campaigns", "Reports", "Dashboards", "Accounts", and "More". The "O-0005" order is highlighted. The "Details" tab is active, showing a list of fields: "HandsMen Order Number", "HandsMen Product", "HandsMen Customer", "Status", "Quantity", "Total Amount", "Customer Email", "Created By", and "Last Modified By". The "Owner" is "Re Laurence Artaga". The "Created By" is "Re Laurence Artaga" and the "Last Modified By" is "Re Laurence Artaga".

4. Inventory Update

New Inventory

Information

Inventory Number

Stock Quantity

Warehouse

HandsMen Product

Cancel Save & New Save

Inventory I-0002

Related Details

Inventory Number

Stock Quantity

Stock Status

Warehouse

HandsMen Product

Created By

Last Modified By

PHASE 5: DEPLOYMENT, DOCUMENTATION & MAINTENANCE

A. Deployment Strategy

The HandsMen Threads CRM was deployed through a structured, carefully managed process using Salesforce Outbound and Inbound Change Sets, ensuring the safe migration of all customizations from Sandbox to Production.

Components Deployed via Change Sets

All project components, including custom objects (HandsMen Customer, Product, Order, Inventory, Marketing Campaign), fields, validation rules, flows, email alerts, Apex classes, permission sets, and page layouts, were bundled into an Outbound Change Set from the Sandbox. In Production, the Inbound Change Set was validated and deployed only after passing all Apex test requirements and dependency checks.

User Acceptance Testing (UAT)

UAT was conducted in the Sandbox to verify the functionality of core features such as order confirmation flows, stock alert automation, scheduled processes, validation rules, email notifications, security configurations, and Apex logic. Test scenarios were designed to mirror real-world business operations and received approval before deployment.

Deployment Logging

A detailed deployment log was maintained to track all actions including deployed components, test results, validation summaries, UAT approvals, issue resolutions, and final deployment status, ensuring complete traceability and accountability throughout the rollout.

B. Maintenance and Monitoring

- Conduct monthly checks of Apex job execution logs.
- Review and adjust inventory threshold settings.
- Add or remove users as needed based on staffing changes.

C. Troubleshooting Approach

- Utilize Debug Logs for automation-related issues.
- Monitor Flow Error Email Notifications.
- Track batch failures through Apex exception logging.

Future Enhancements

To continue improving the HandsMen Threads CRM and enhance overall business efficiency, the following initiatives are recommended:

1. **Enhanced Reporting and Dashboards:** Develop interactive dashboards that track sales trends, customer activity, and inventory levels in real time to support faster, data-driven decisions.
2. **Customer Segmentation and Targeted Marketing:** Implement tools to segment customers based on purchase history, loyalty status, and preferences, enabling personalized promotions and campaigns.
3. **Mobile Accessibility Improvements:** Optimize the CRM interface for mobile devices, ensuring staff can manage orders, inventory, and customer interactions on the go.
4. **Automated Customer Feedback Collection:** Integrate feedback forms or surveys to capture customer insights automatically after purchase, helping improve service quality and product offerings.
5. **Process Automation Expansion:** Identify repetitive tasks such as inventory alerts, order approvals, or follow-up emails and automate them further using Salesforce Flows or Apex to save time and reduce errors.

CONCLUSION

The HandsMen Threads CRM successfully enhances customer engagement, automates order management, and improves operational efficiency. Leveraging custom objects, flows, Apex logic, and robust security measures, the system provides a scalable and reliable foundation for the business while supporting future growth through additional automation, analytics, and customer-focused enhancements.