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

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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 alers
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

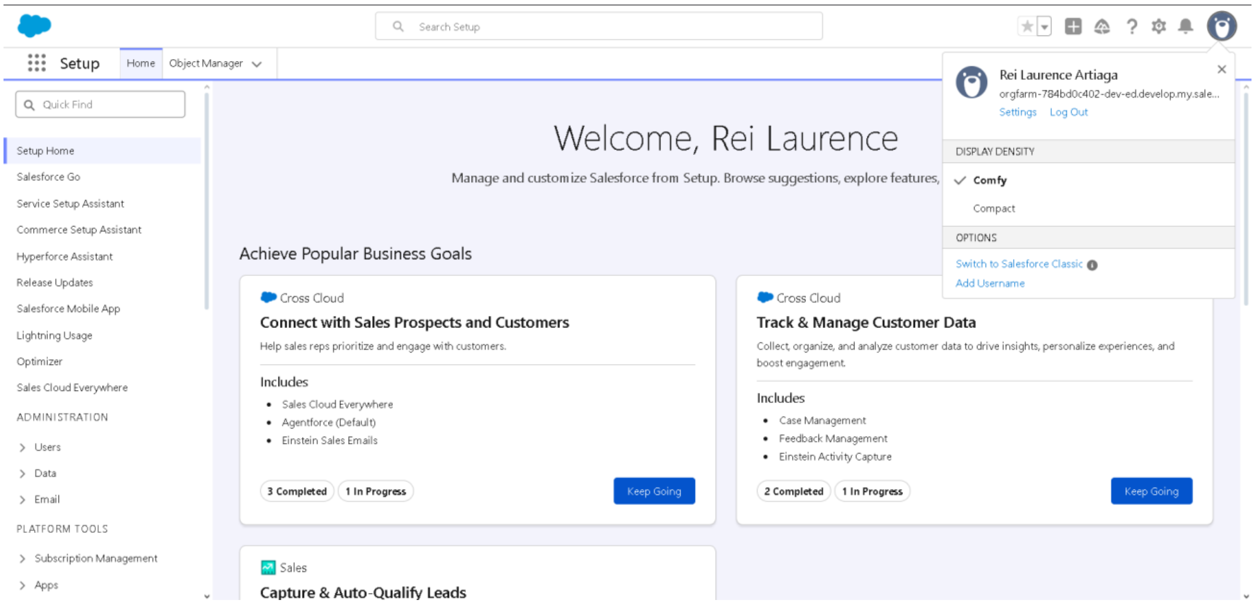
• Move the solution to the production environment.

• Provide user training on the newly implemented features.

• Offer post-launch support and ongoing system monitoring

PHASE 2: SALESFORCE DEVELOPMENT – BACKEND & CONFIGURATIONS

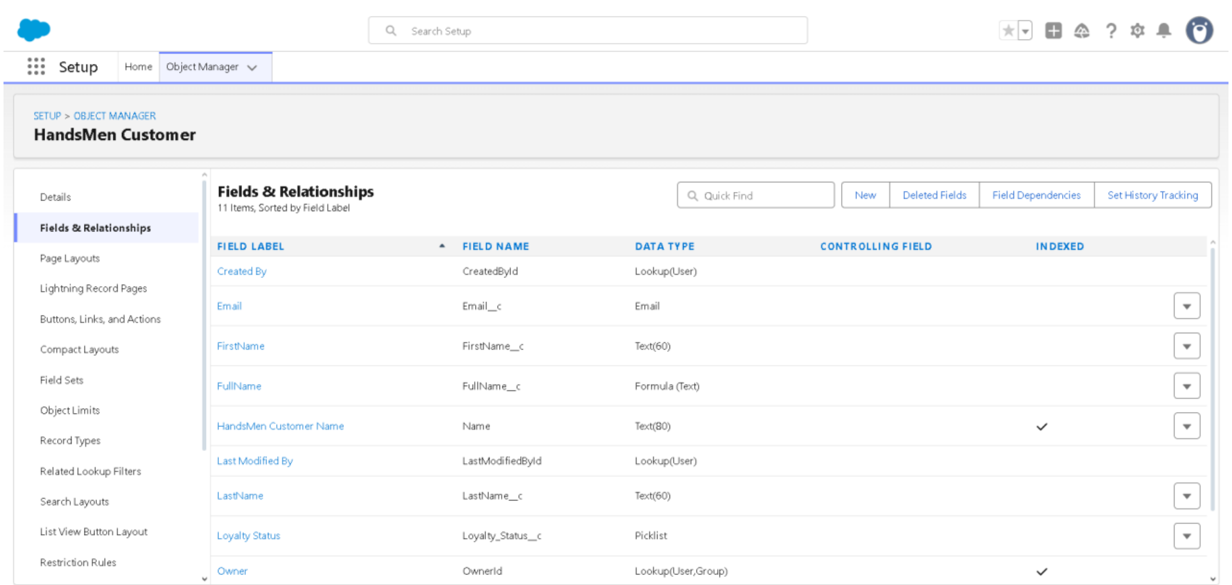
1. Environment Setup & DevOps Workflow



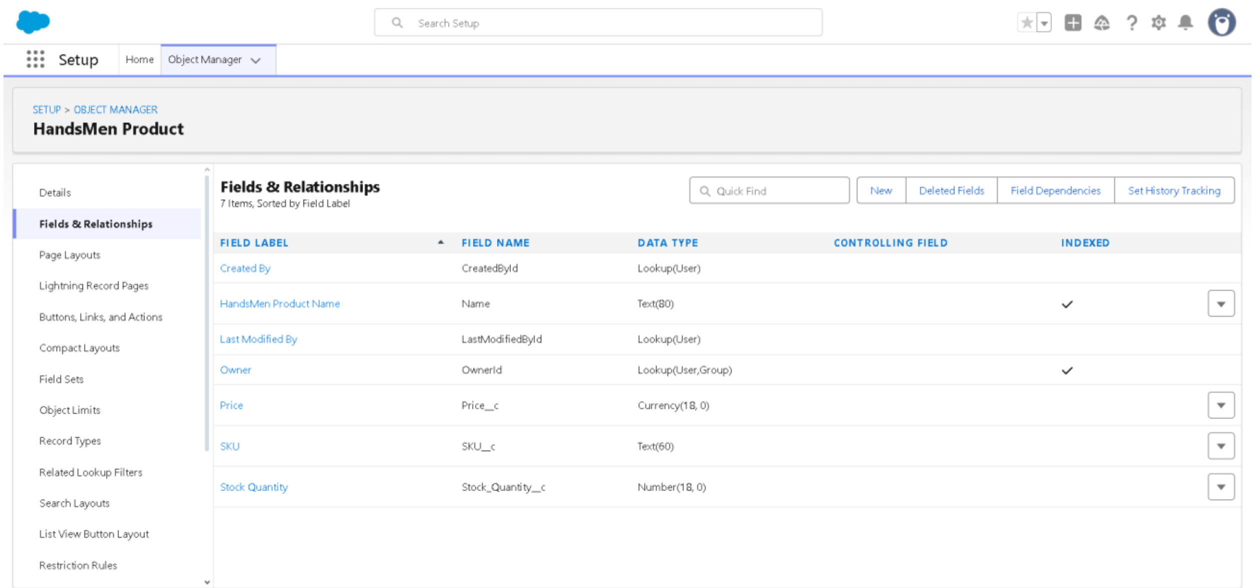
2. Customization (Objects, Fields, Validation Rules, Automation)

Objects & Fields Setup

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

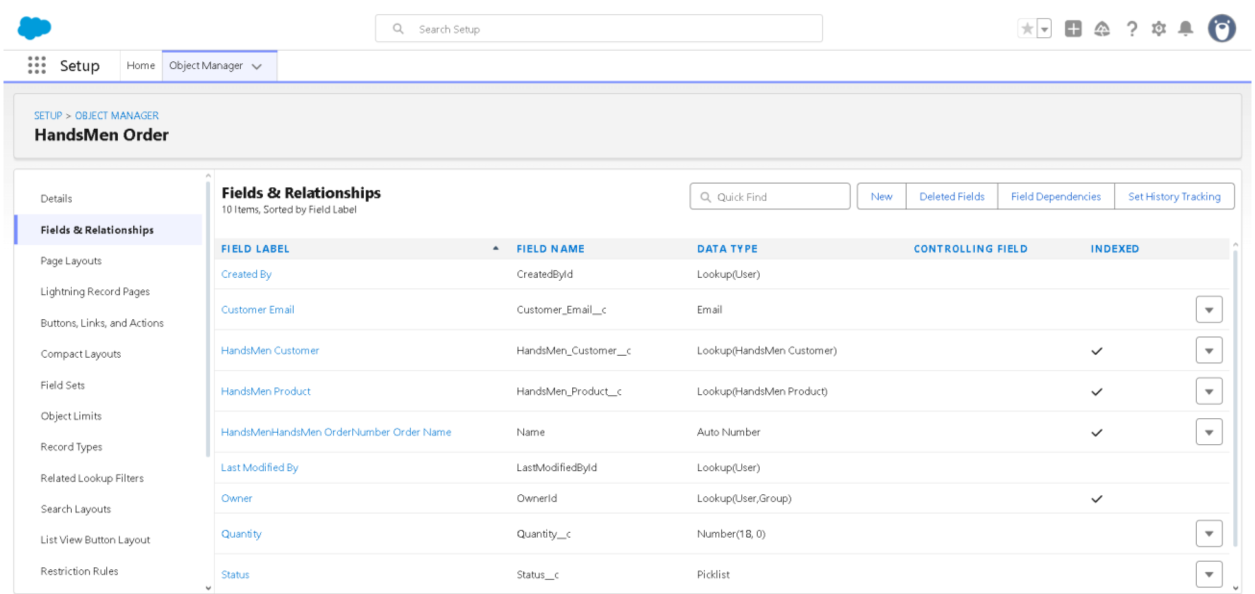


• **HandsMen Product** – Holds information about all products offered by HandsMen Threads.



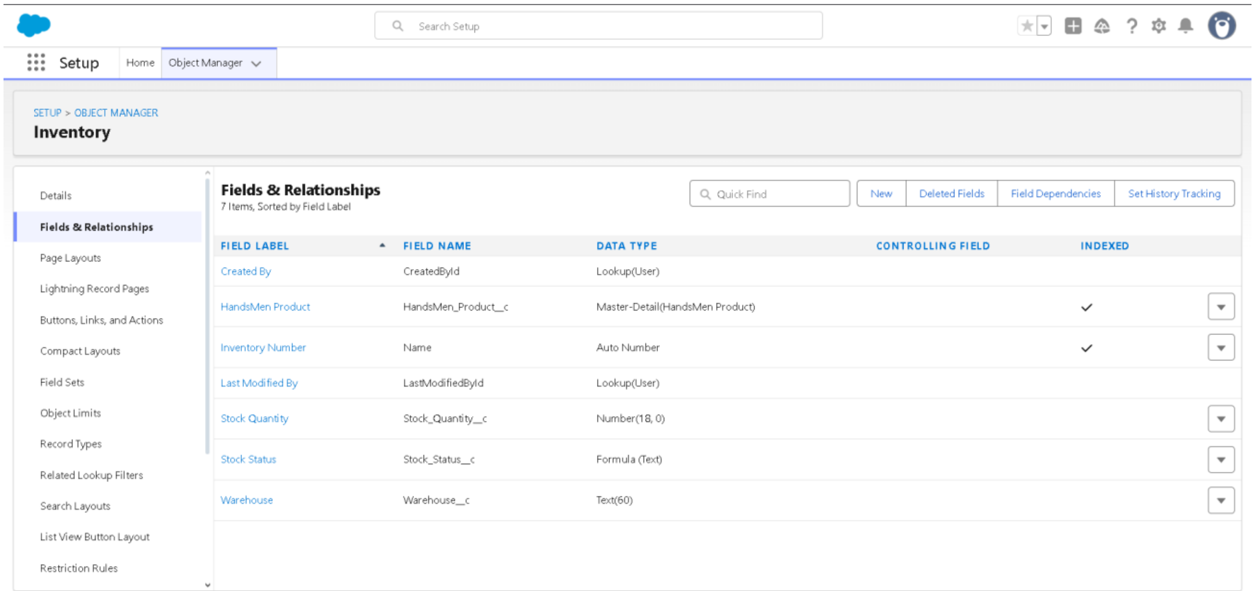
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
HandsMen Product Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Price	Price__c	Currency(18, 0)		
SKU	SKU__c	Text(60)		
Stock Quantity	Stock_Quantity__c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

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

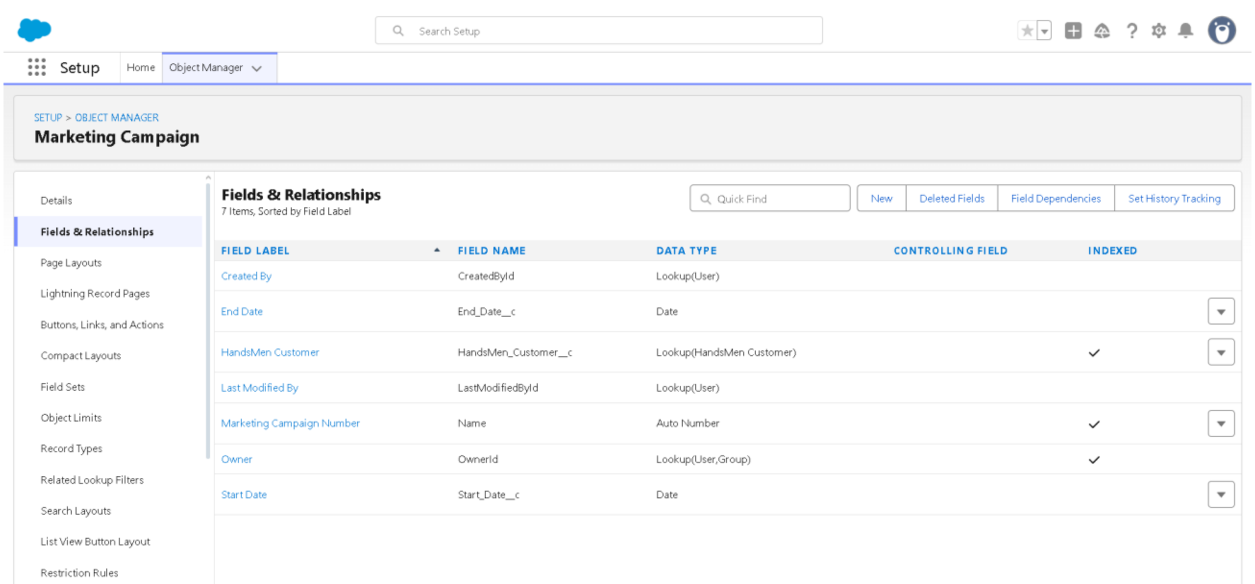


FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Customer Email	Customer_Email__c	Email		
HandsMen Customer	HandsMen_Customer__c	Lookup(HandsMen Customer)		✓
HandsMen Product	HandsMen_Product__c	Lookup(HandsMen Product)		✓
HandsMenHandsMen OrderNumber Order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

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



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



Validation Rules Created

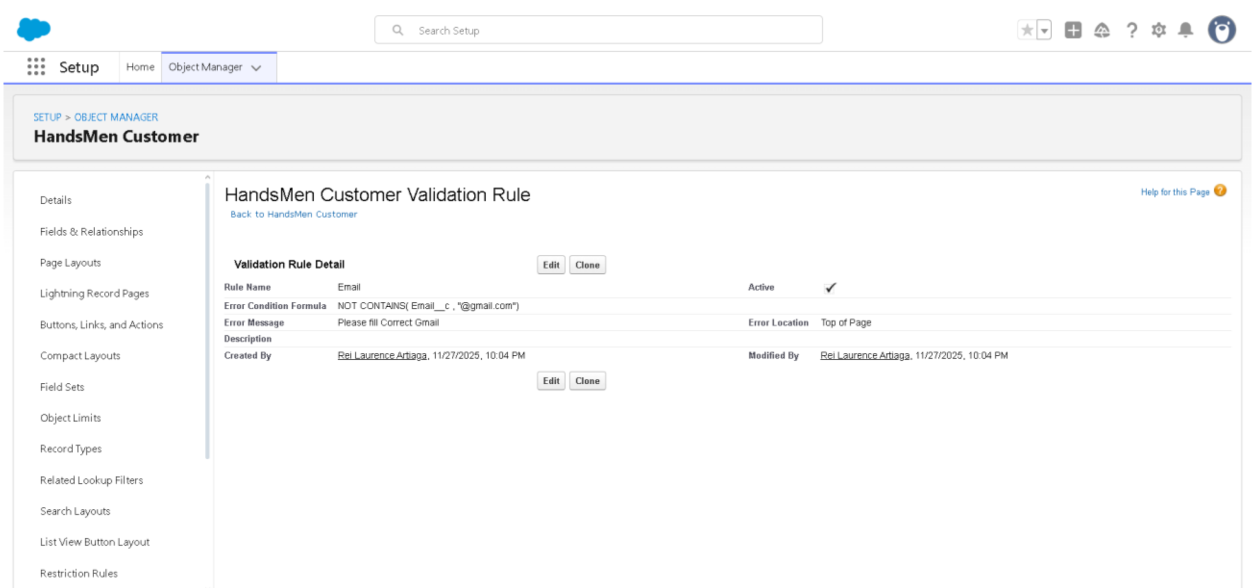
Examples:

- **Valid Email Format**

  Object: HandsMen Customer__c

  Field: Email

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

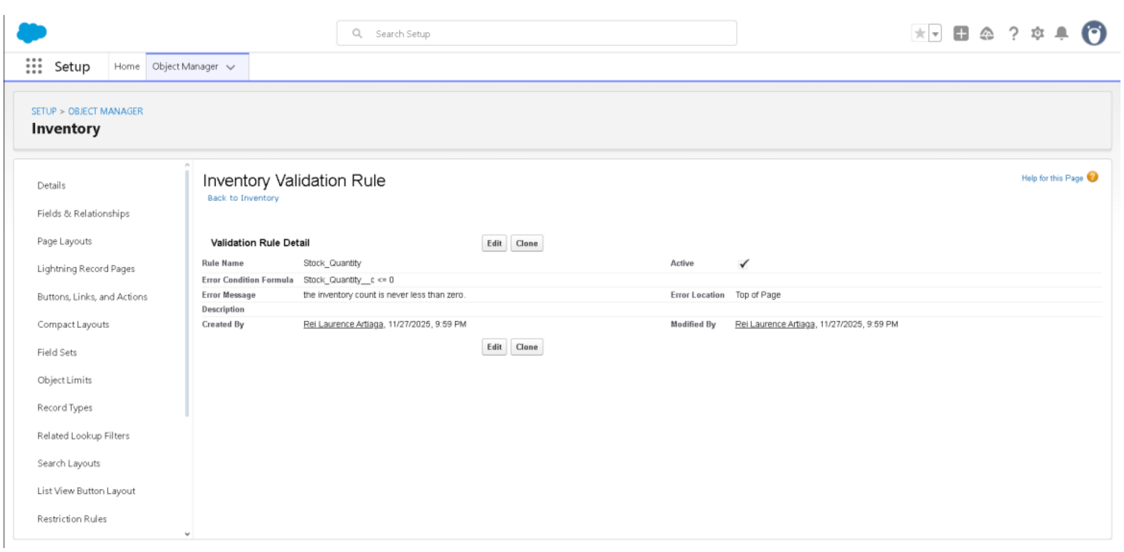


- **Stocks cannot be negative**

  Object: Inventory__c

  Field: Stock_Quantity__c

  Validation Rule: Stock_Quantity__c < = 0

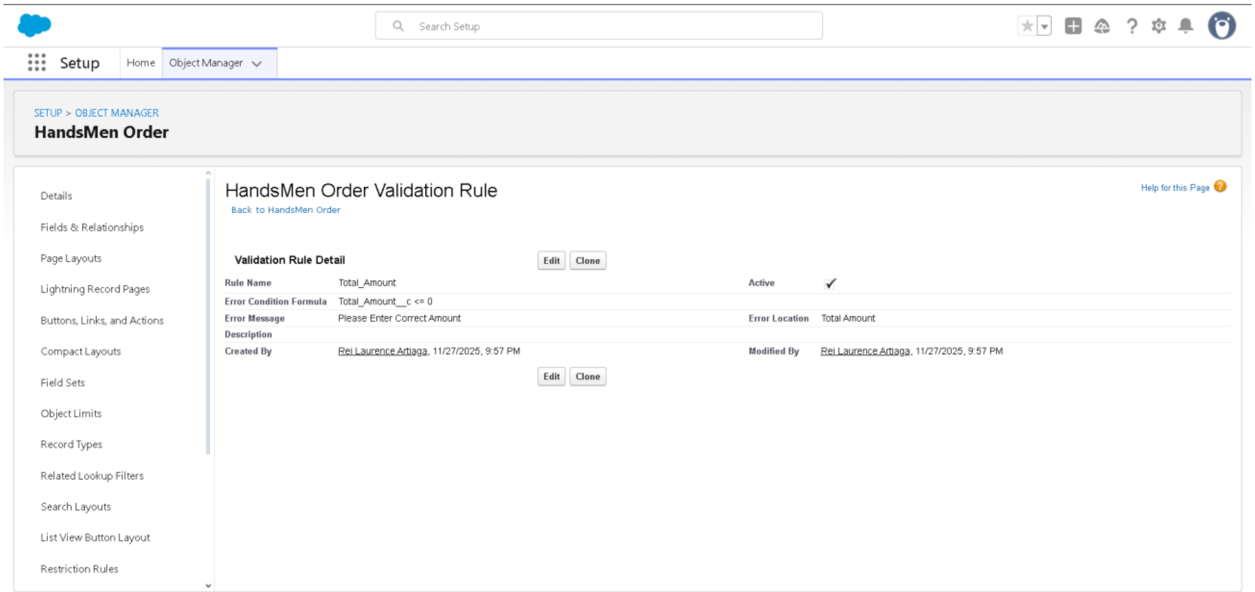


- **Correct Order Amount**

  Object: HandsMen Order__c

  Field: Total_Amount__c

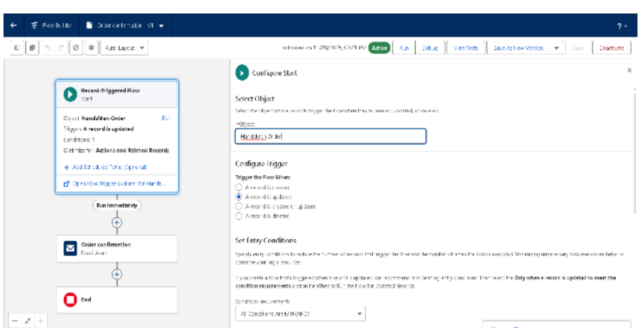
  Validation Rule: Total_Amount__c <= 0

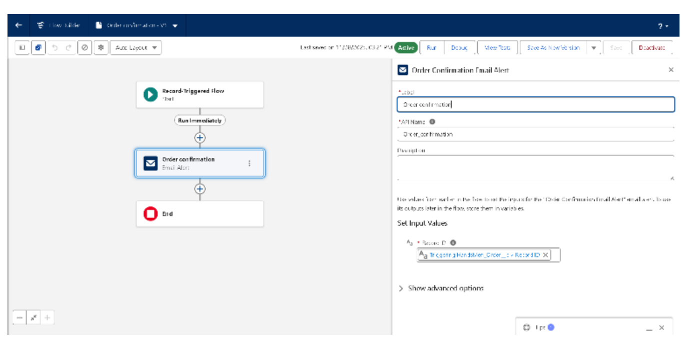


Automation Tools Used

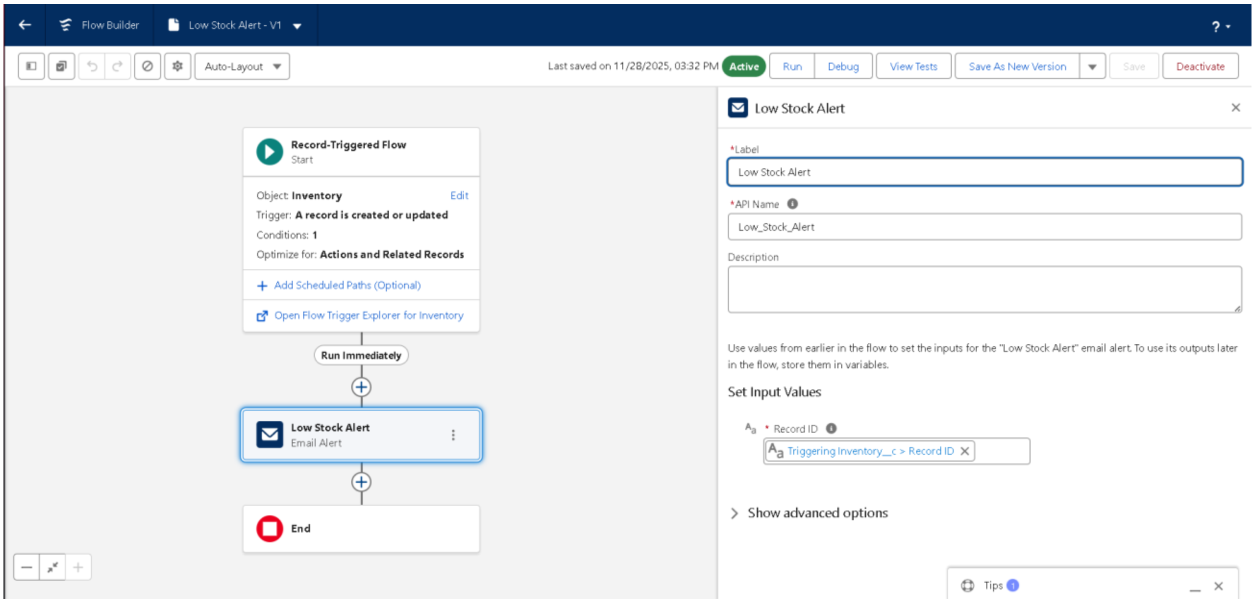
Flows implemented

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

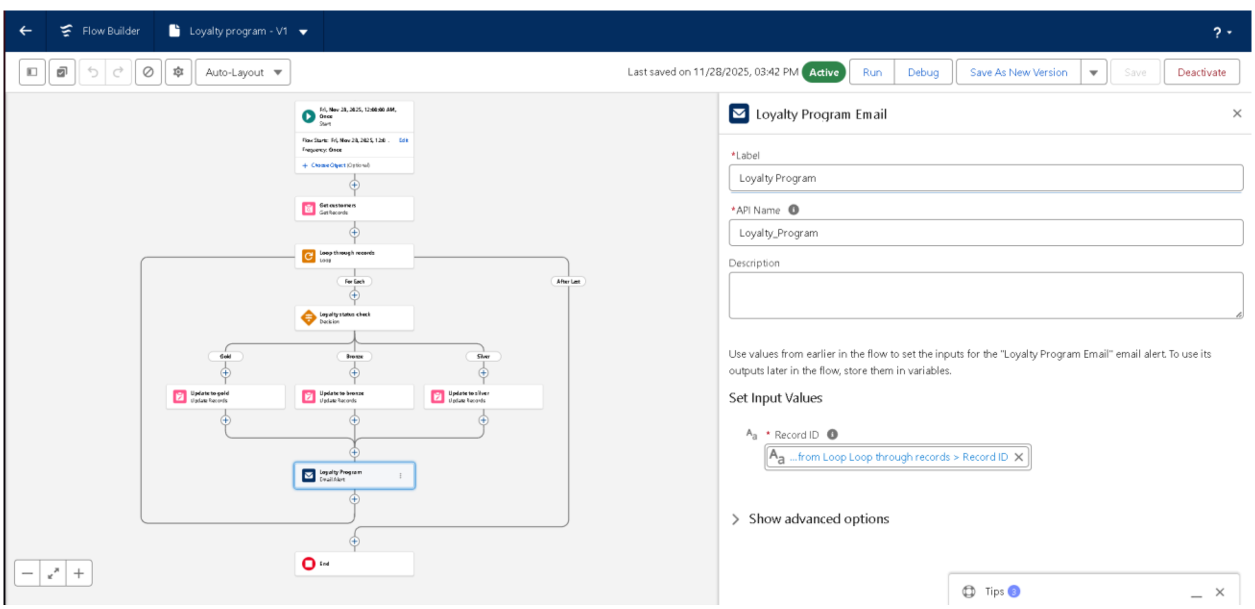




2. **Stock Alert Flow** – Triggers email when stock < 5



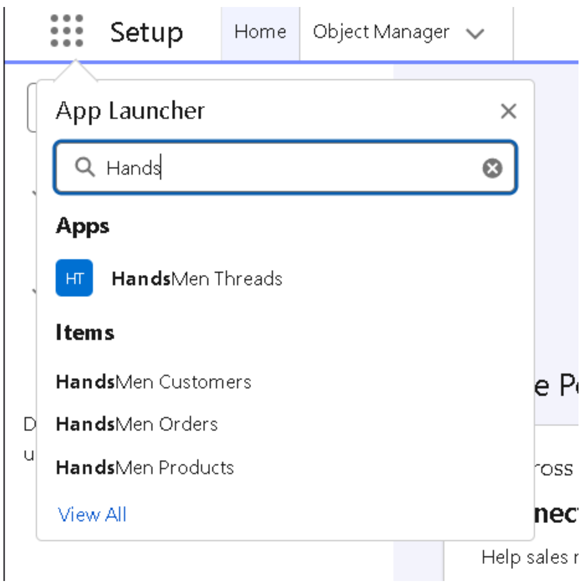
3. **Loyalty Status Update** (Scheduled Flow) – Runs at midnight

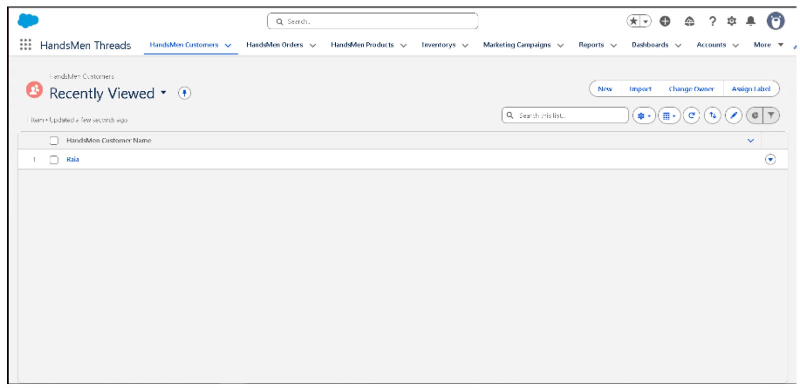


PHASE 3: UI/UX DEVELOPMENT & CUSTOMIZATION

1. Lightning App Setup

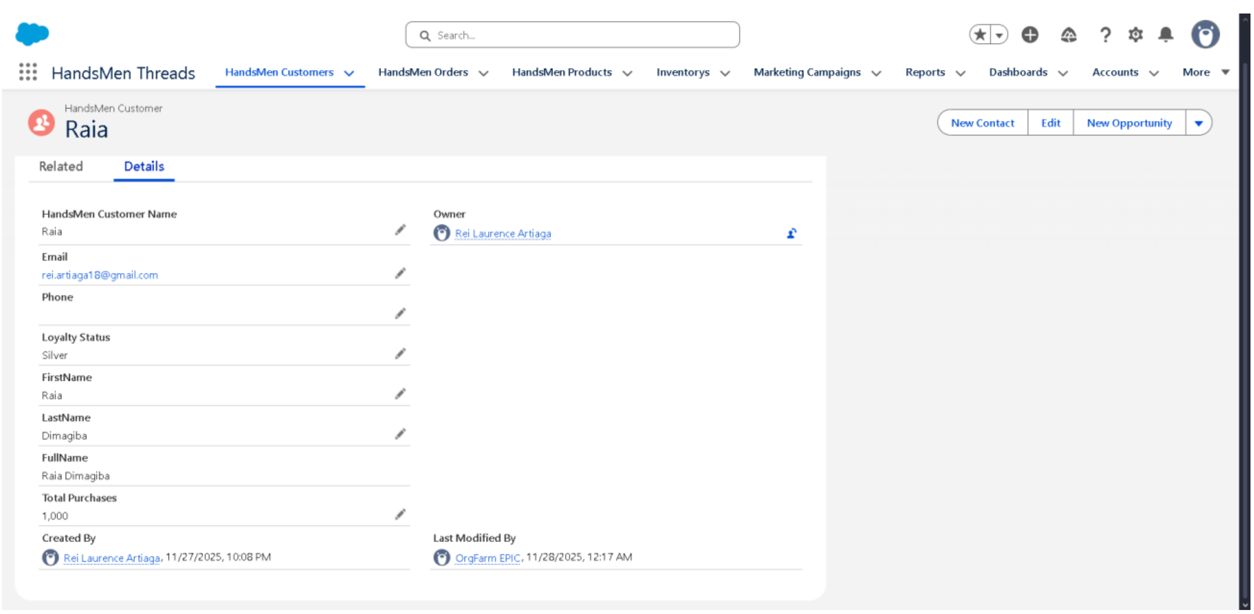
App Name: HandsMen Threads – Features navigation tabs for managing customers, orders, inventory, and products.



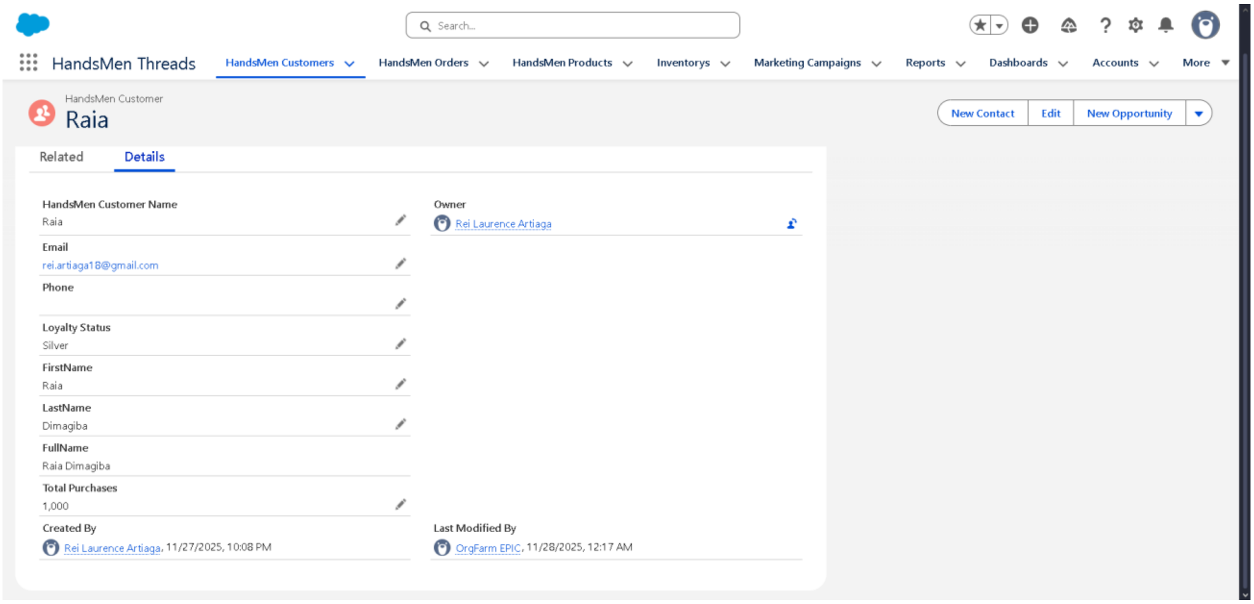


2. Page Layouts & Dynamic Forms

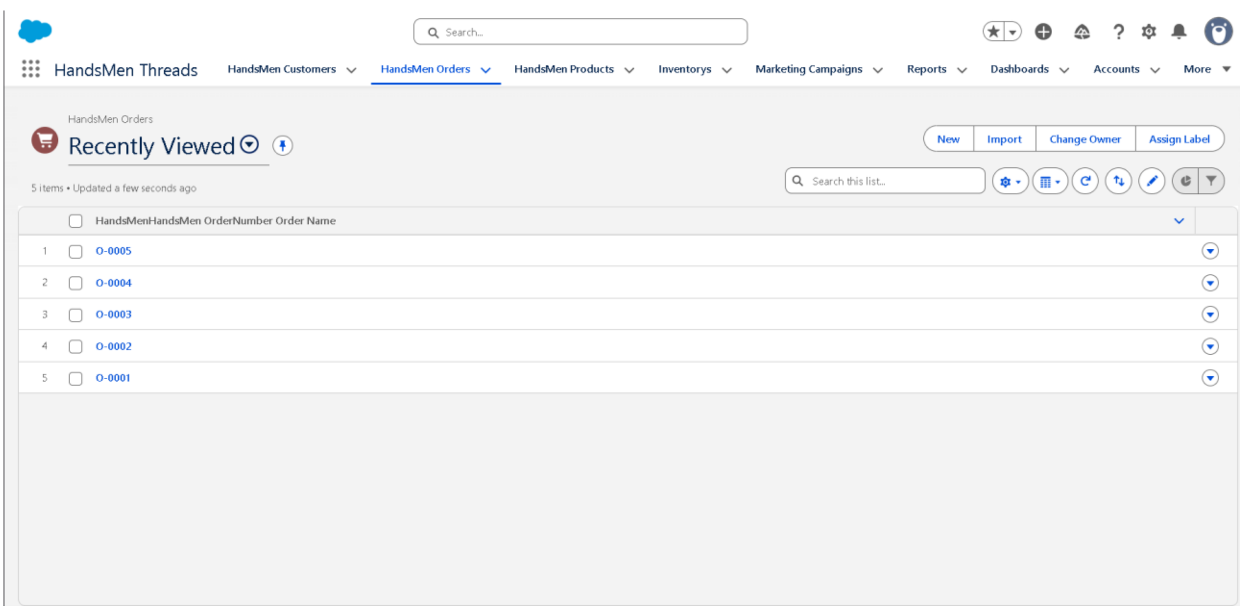
- **Customer Info** – Displays key customer details, including name, email, loyalty status, and total purchase value.



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

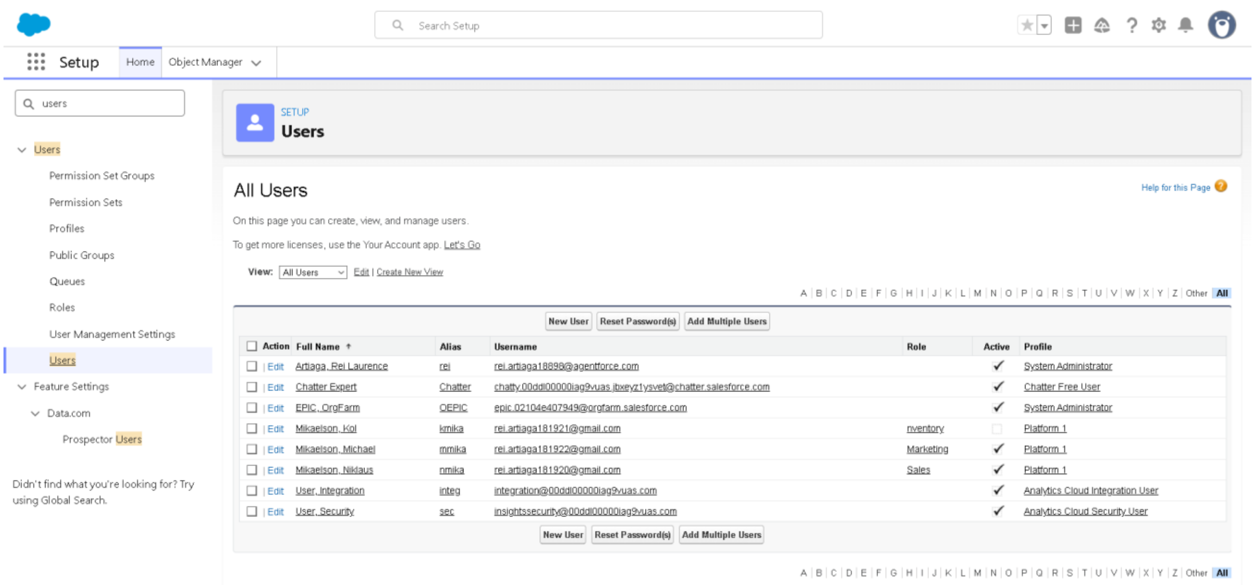


- **Order Items –** list of orders

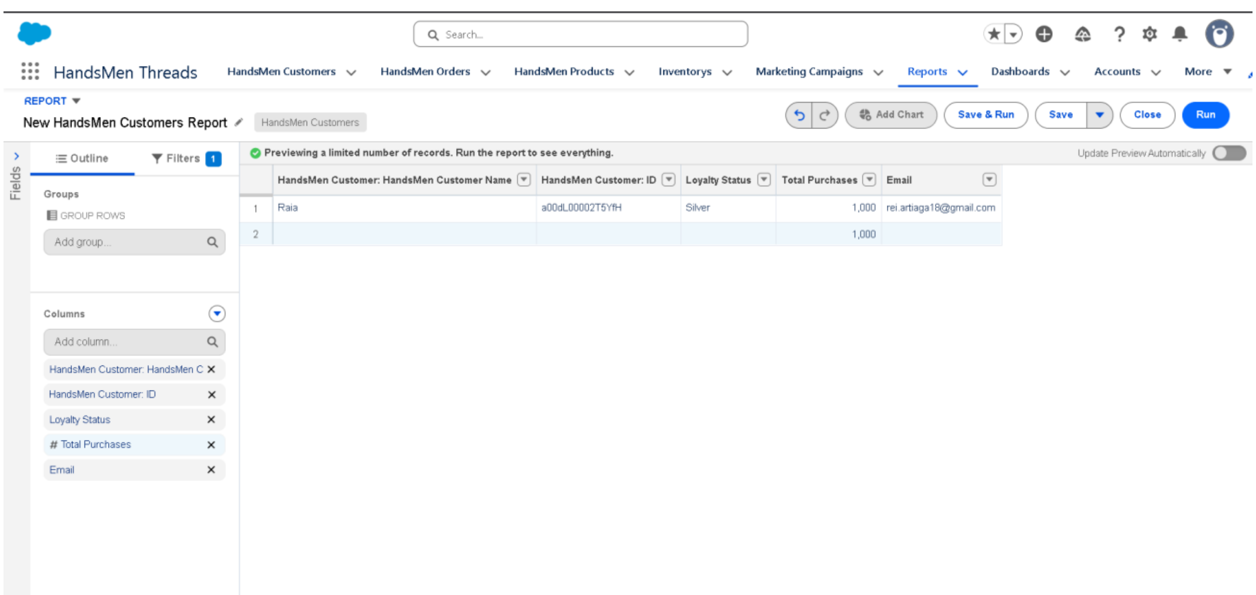


3. User Management

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



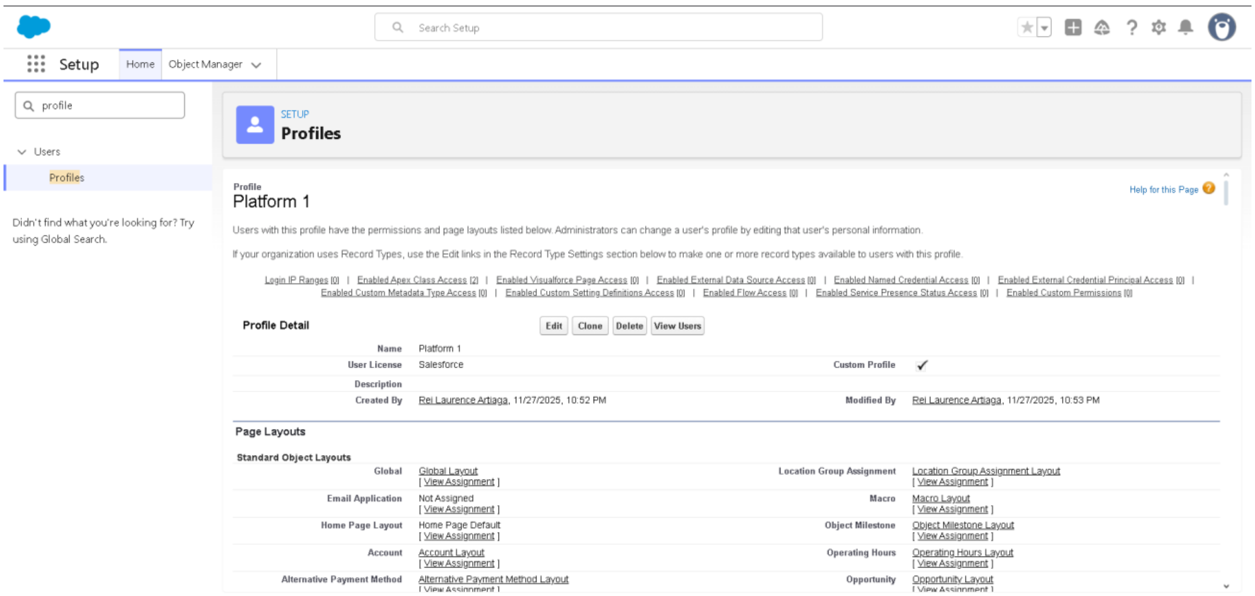
4. Reports & Dashboards



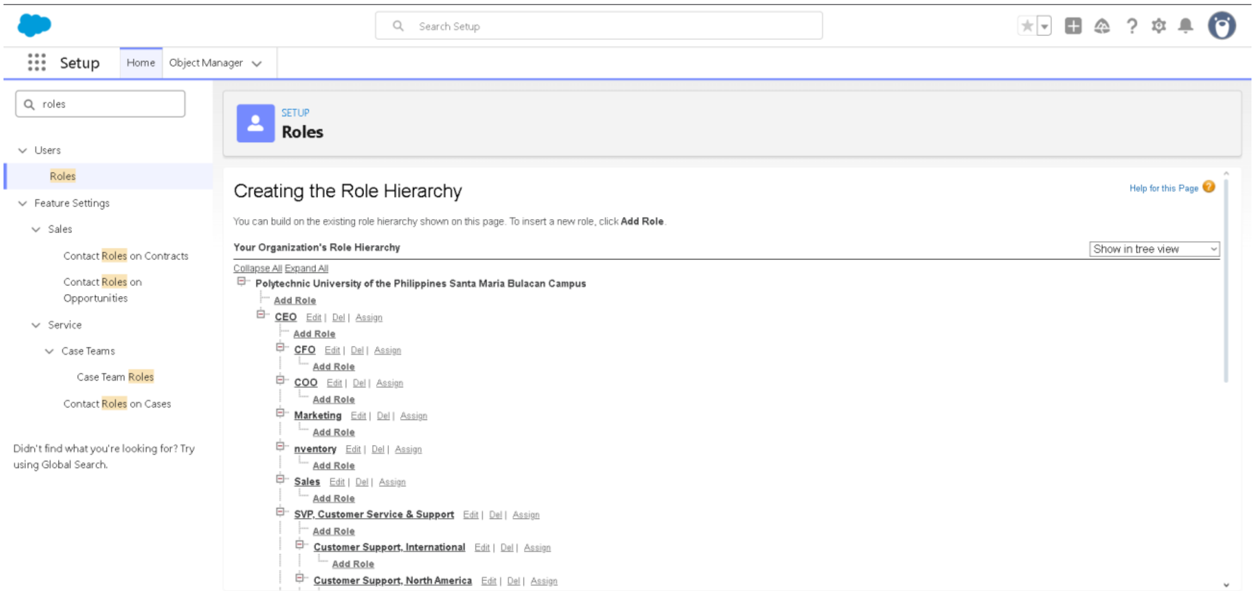
PHASE 4: DATA MIGRATION, TESTING & SECURITY

1. Security Settings

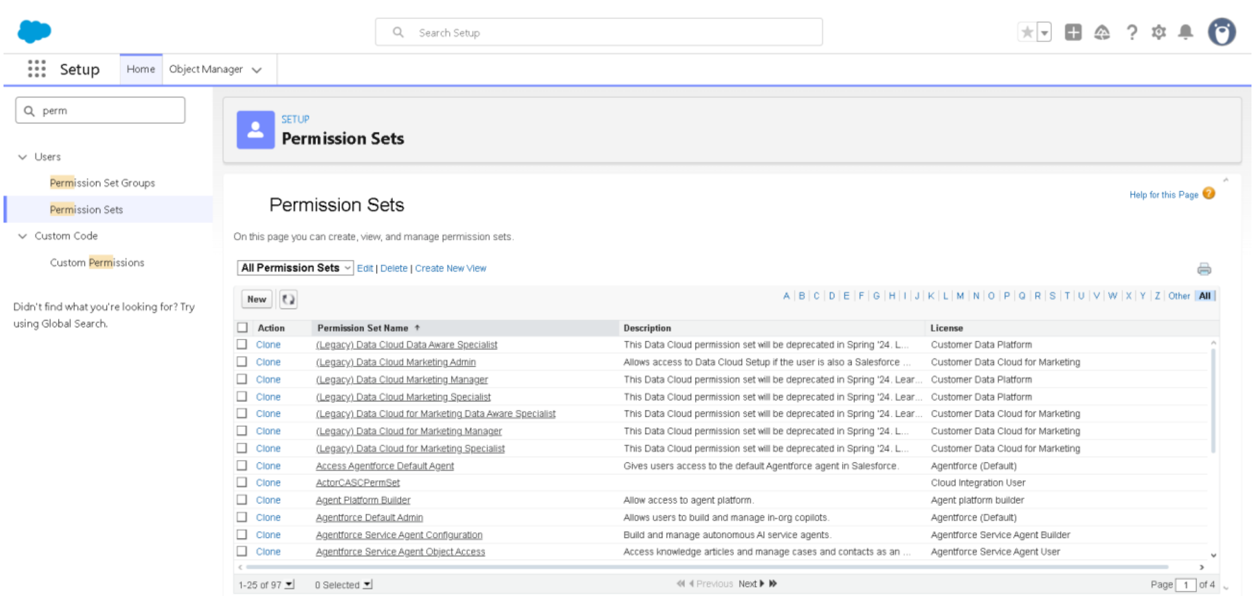
Profiles – Shows Platform 1 profile



Roles & Role Hierarchy – Inventory, Marketing, Sales under CEO

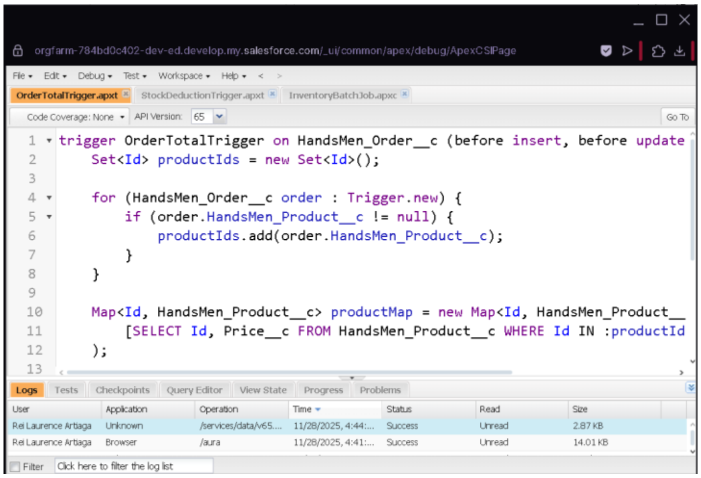


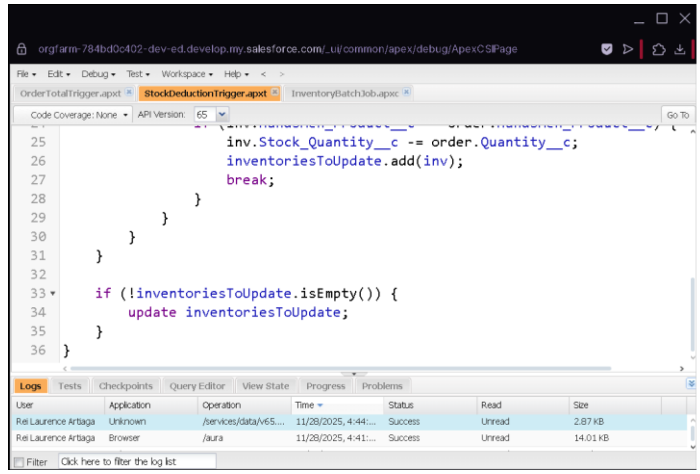
Permission Set: Marketing and Inventory Permission Set (I assigned it to a Platform 1 User: Niklaus Mickaelson and Kol Mickaelson)

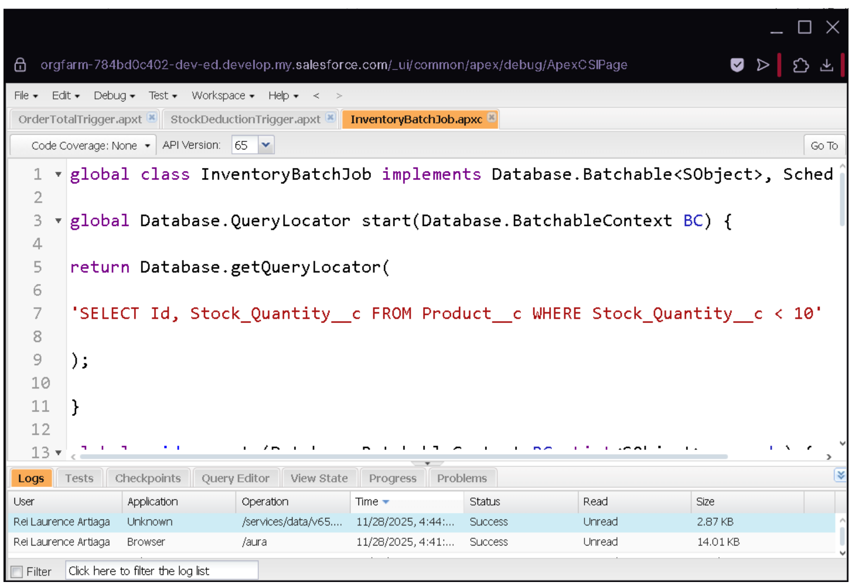


2. Test Classes

- Triggers – OrderTotalTrigger, StockDeductionTrigger, OrderTrigger

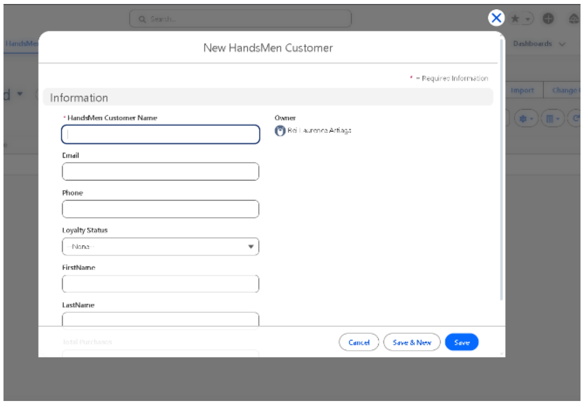


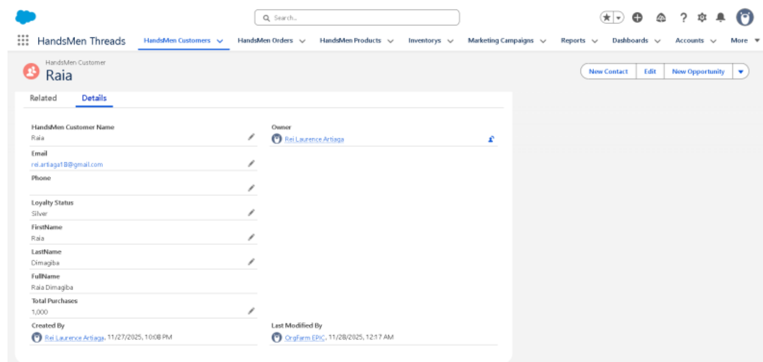




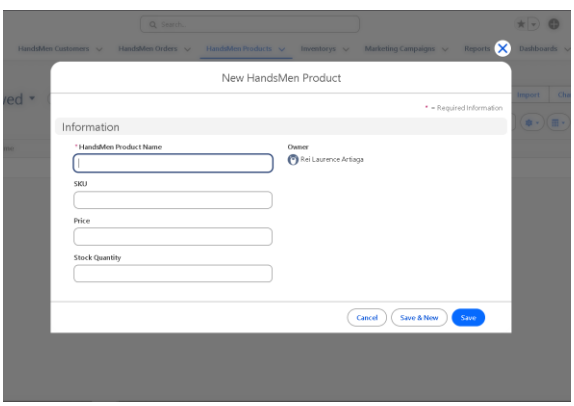
3. Testing Approach

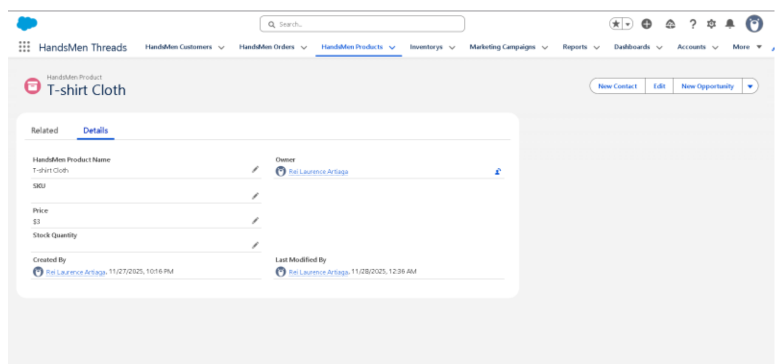
1. Customer Creation



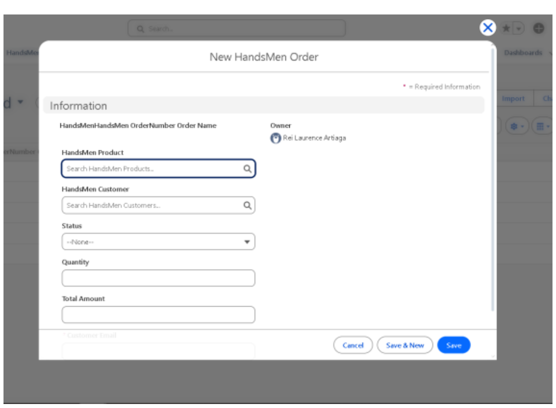


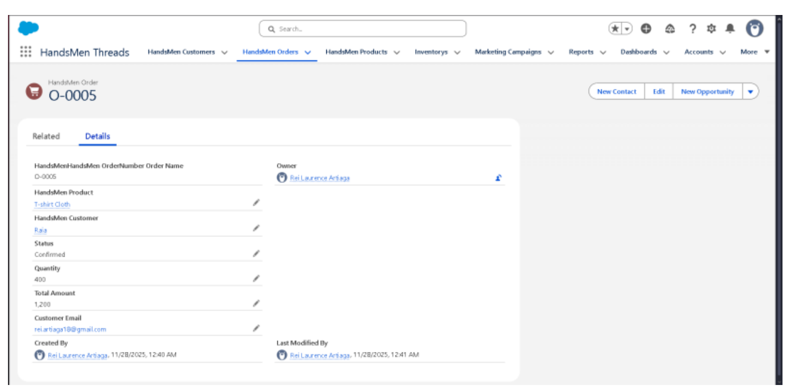
2. Products Creation



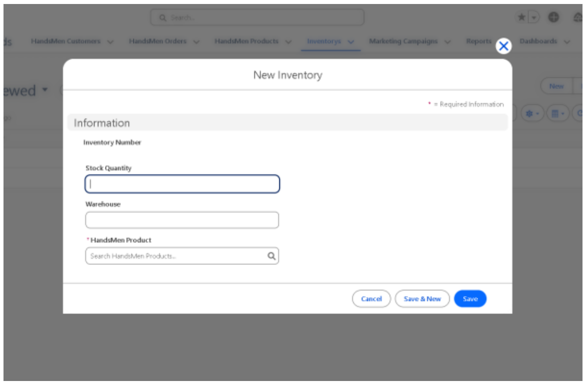


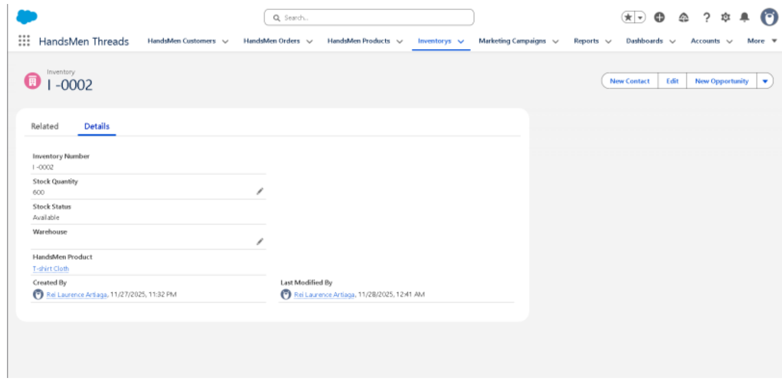
3. Order Creation & Status Update





4. Inventory Update





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.