

HandsMen Threads Salesforce Project Documentation

Project Overview

HandsMen Threads is a Salesforce CRM application built for a premium men's fashion business. The goal of this project is to streamline custom order management, improve inventory control, and enhance customer engagement through automation. The CRM includes custom objects, flows, validation rules, Apex triggers, and batch processes to manage end-to-end operations efficiently.

Objectives

The main objective of this CRM is to automate and optimize core business processes such as order confirmation, loyalty status updates, and low stock alerts. The system reduces manual effort, improves data accuracy, and supports business scalability. By implementing automation and logic-driven validation, the system ensures smooth and error-free operations across departments.

Phase 1: Requirement Analysis & Planning

- Identified the need to track customers, orders, products, and inventory.
- Defined five custom objects: HandsMen Customer, HandsMen Product, HandsMen Order, Inventory, and Marketing Campaign.
- Mapped relationships and defined required fields including formulas and lookups.
- Outlined validation rules and automation logic for each process.

Phase 2: Salesforce Development - Backend & Configurations

- Created all custom objects and fields using Object Manager.
- Implemented Flows for automation: Order Confirmation, Loyalty Update, Stock Alert.
- Developed Apex classes: OrderTriggerHandler for validation and InventoryBatchJob for scheduled restocking.
- Configured email templates and created related alerts using Flow Actions.

Phase 3: UI/UX Development & Customization

- Added custom tabs for all five objects using App Manager.
- Created page layouts for Orders and Products.
- Integrated validation messages for user feedback.
- Enabled users to access Lightning App with a user-friendly interface.

Phase 4: Data Migration, Testing & Security

- Created test records for Orders, Products, and Customers manually.
- Verified that Flows and Apex logic executed as expected.
- Created roles: Inventory Manager and Marketing Manager.
- Assigned Permission Sets for object-level access.

Phase 5: Deployment, Documentation & Maintenance

- Retrieved metadata using Salesforce CLI and SFDX project structure.
- Initialized Git repository and pushed complete project to GitHub.
- Added screenshots and documentation PDF to GitHub repository.
- Repository link: https://github.com/Syedhamish/HandsMen-Threads_Men-s-Fashion_project

Conclusion

This Salesforce CRM project demonstrates the ability to build a real-world system using Flows, Apex, custom objects, and declarative tools. It successfully automates key business operations and is version-controlled via GitHub. The solution can be extended further with reports, dashboards, and LWC components for enhanced functionality.