

HandsMen Threads – Salesforce CRM

Project Documentation

Project Overview

HandsMen Threads is a custom Salesforce CRM application tailored for the premium men's fashion brand, HandsMen Threads. The primary goal of the project is to streamline customer relationships, order management, inventory control, and customer engagement via automation within Salesforce. This CRM enables operational efficiency through custom objects, automated workflows, validation, Apex triggers, batch processing, and secure access controls.

Project Objectives

- Automate and optimize business processes, reducing manual effort.
 - Ensure data accuracy in customer, order, product, and inventory management.
 - Enable automated email communications (order confirmations, loyalty updates, stock alerts).
 - Improve scalability of operations via automation and systematized data management.
 - Strengthen security with custom roles, profiles, and permission sets.
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Project Phases

Phase 1: Architecture & Planning

- Defined custom objects and relationships:
 - **HandsMen_Customer__c**: Manages customer information & loyalty.
 - **HandsMen_Order__c**: Tracks order status and quantity.
 - **HandsMen_Product__c**: Stores the product catalog.
 - **Inventory__c**: Manages stock levels and product availability.
 - **Marketing_Campaign__c**: Organizes marketing campaigns.
- Established:
 - Validation rules
 - Automation flows

- Apex triggers & batch jobs
 - Email templates for notifications and communication
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Phase 2: Development

- Created all necessary custom objects and fields.
 - Implemented automation via:
 - **Flows:**
 - Order Confirmation Email
 - Low Stock Email Alert
 - Scheduled Loyalty Tier Update
 - **Apex Classes:**
 - OrderTriggerHandler: Validates order quantity rules.
 - **Apex Triggers:**
 - OrderTrigger: Manages before-insert/update logic.
 - **Batch Apex Jobs:**
 - LoyaltyPointsBatch: Weekly updates of customer loyalty points.
 - InventorySyncBatch: Daily stock synchronization.
 - Configured data security:
 - Custom profiles and permission sets.
 - Role hierarchy for Inventory and Marketing managers.
 - Created formatted email templates:
 - Order Confirmation
 - Low Stock Alert
 - Loyalty Program Congratulations
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Phase 3: Testing & QA

- Unit tested objects, automation, and Apex logic.
- Conducted end-to-end testing with test records for:
 - Orders

- Products
 - Customers
 - Performed performance testing and validated security controls.
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Phase 4: Deployment & Training

- Deployed the solution to production using Salesforce CLI:

bash

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```
sf org login web -a handsmen-dev
```

```
sf project deploy start -o handsmen-dev
```

```
sf force:user:permset:assign -n Permission_Platform_1
```

- Set up the Salesforce Lightning App:
 - HandsMen Threads App featuring:
 - HandsMen Customers
 - Orders
 - Products
 - Inventory
 - Marketing Campaigns
 - Reports & Dashboards
 - Trained users on system usage and features.
 - Provided post-go-live support and monitoring.
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Phase 5: Documentation, Maintenance & Version Control

- Project structured in **SFDX project format**, with folders for objects, flows, Apex classes, triggers, layouts, and emails.
- Metadata retrieval supported via package.xml.
- Initialized and pushed to GitHub repository:
 -  [GitHub Repository](#)
- Documentation and screenshots included for developer reference and maintenance.

Additional Technical Details

Folder Structure

pgsql

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sfdx-project.json

force-app/

└─ main/

└─ default/

└─ objects/

└─ flows/

└─ classes/

└─ triggers/

└─ layouts/

└─ email/

.gitignore

README.md

package.xml

Metadata Retrieval

To retrieve all metadata:

bash

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sf project retrieve start -x package.xml

Package XML Components

xml

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<ApexClass>

<ApexTrigger>

<Flow>

<CustomObject>

<EmailTemplate>

<PermissionSet>

<Profile>

<Layout>

<LightningComponentBundle>

Conclusion

This Salesforce CRM project for HandsMen Threads efficiently integrates automation, data management, and user engagement features. The system is scalable, version-controlled, and ready for future enhancements like detailed reports, dashboards, and Lightning Web Components (LWC).

Author: Shubhashree K

GitHub: <https://github.com/Shubhashree1812/HandsMenThreads.git>