

# **Salesforce CRM Project Documentation: HandsMen Threads**

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### Project Overview

HandsMen Threads is an emerging brand in the men's fashion industry aiming to enhance customer engagement, streamline operations, and optimize data integrity using Salesforce CRM. The goal of this Salesforce project was to create a scalable CRM platform tailored to the needs of a fashion retail business by automating order management, stock control, loyalty tracking, and customer communication.

### Objectives

- Design a robust data model for customers, orders, products, inventory, and campaigns.
- Automate business operations using Flows and Apex.
- Ensure data accuracy using validation rules and controlled access.
- Provide timely communication with automated email notifications.
- Implement scalable and scheduled processes using asynchronous Apex.

### Phase 1: Requirement Analysis & Planning

- Understanding Business Requirements:
  - Need for tracking customer loyalty.
  - Automated stock management and order confirmation.
  - Real-time communication with customers.
- Defining Project Scope and Objectives:
  - Automate customer lifecycle from order to loyalty.
  - Minimize manual data entry.
  - Enable real-time internal updates.
- Design Data Model and Security Model:
  - Objects: Customer, Order, Product, Inventory, Marketing Campaign.
  - Security: Roles for Sales Manager, Inventory Manager, and Marketing Team.

### Phase 2: Salesforce Development - Backend & Configurations - Setup Environment & DevOps Workflow:

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- Configurations done in Developer Org, moved to production.
- Customization:
  - Custom Objects and Fields: HandsMen\_Customer\_\_c, HandsMen\_Order\_\_c, etc.
  - Validation Rules: Ensure stock levels, email formats, order integrity.
  - Automation: Record-triggered Flows for confirmations and alerts.
- Apex Development:
  - Triggers:
    - Auto-calculate order total.
    - Update inventory post order.
  - Loyalty status update.
- Batch Apex:
  - Loyalty points calculation (Weekly).
  - Warehouse sync (Daily).

### Phase 3: UI/UX Development & Customization

- Lightning App Setup:
  - App created using App Manager.
- Page Layouts and Forms:
  - Layouts adjusted for each role.
  - Dynamic Forms for Order and Customer objects.
- User Management:
  - Roles, Profiles, Permission Sets created.
- Reports and Dashboards:
  - Dashboard showing Sales, Inventory, and Loyalty Summary.
- Lightning Pages:
  - Configured for each object.
- LWC Development:
  - Not implemented in this phase.

### Phase 4: Data Migration, Testing &

Security - Data Loading:

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- Used Data Import Wizard and Data Loader.
- Tracking and Rules:
  - Field History Tracking on Orders, Inventory.
  - Duplicate and Matching Rules set on Customers.
- Security Settings:
  - Profiles for each user role.
  - Role Hierarchy and Sharing Rules enforced.
- Testing:
  - Unit Tests for Apex.
  - Manual testing for Flows and Automation.
- Test Cases:
  - Booking Creation
  - Approval Process
  - Automatic Task Creation
  - Flows & Triggers
- Screenshots of Input/Output stored.

### **Phase 5: Deployment, Documentation & Maintenance**

- Deployment Strategy:
  - Used Change Sets to move metadata.
- Maintenance Plan:
  - Regular monitoring of Flows and Batch Jobs.
  - Bug fixes and enhancements based on user feedback.
- Troubleshooting Approach:
  - Maintain error logs.
  - Apex debug logs monitored weekly.

### **Conclusion**

The Salesforce CRM implementation for HandsMen Threads resulted in a fully automated, role-based, scalable system for order and customer management. The system significantly reduced manual

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operations, enhanced customer experience, and provided real-time operational insights. The project lays the foundation for future enhancements like AI-driven recommendations and chatbot integrations.

### **Future Enhancements**

- AI-based product recommendations.
- Chatbot integration for customer support.
- Enhanced analytics with Einstein Reporting.

### **Screenshots and Additional Artifacts**

(All screenshots of custom object setup, validation rules, automation flows, Apex triggers, and dashboards should be inserted in this section.)