

HandsMen Threads: Elevating the Art of Sophistication in Men's Fashion

PROJECT OVERVIEW

This paper introduces HandsMen Threads: Elevating the Art of Sophistication in Men's Fashion, a project focused on modernizing the company's operations through Salesforce CRM. As the business expands, managing customer records, orders, and personalized services has become more challenging, especially with manual processes slowing down productivity and creating data inconsistencies. With the adoption of Salesforce CRM, the organization centralizes its data into one scalable system, enabling automation, reliable tracking, timely communication, and personalized loyalty features, all designed to improve efficiency and enhance the overall customer experience.

OBJECTIVES

The core goal of this initiative is to deploy a fully customized and scalable Salesforce CRM solution designed to underpin our critical operational requirements. This project is fundamentally about creating a unified, reliable platform that consolidates essential business data, including customer profiles, orders, and inventory into a single source of truth.

By leveraging advanced automations, such as immediate order confirmations, proactive low-inventory notifications, systematic loyalty program communications, and scheduled data processing, the new CRM will dramatically cut down on repetitive manual tasks and eliminate costly human errors, resulting in significantly accelerated and more reliable business workflows.

Expected Business Deliverables:

- **Elevated Customer Experience** - Drive retention and satisfaction through timely, automated, and personalized communications.
- **Operational Excellence** - Achieve maximum efficiency by automating routine tasks and accelerating end-to-end workflows.
- **Precise Inventory Control** - Ensure stock accuracy and reduce business friction caused by shortages, delays, or overstocking.

- **Accelerated Throughput** - Streamline and speed up the entire order-to-fulfillment process.
- **Data-Driven Decisions** - Empower leadership and teams with consistent, real-time data for stronger strategic and tactical choices.
- **Future-Proof Scalability**- Establish a system architecture capable of supporting the business's long-term growth and evolving needs.

PHASE 1: REQUIREMENT ANALYSIS AND PLANNING

Business Requirements

HandsMen Threads has identified a critical need to modernize its CRM capabilities to bridge the gap between operational workflows and customer engagement. Currently, the business is hampered by manual bottlenecks, specifically in order confirmation, inventory tracking, and bulk processing, which lead to data inconsistencies and delayed responses.

To resolve this, the proposed Salesforce solution prioritizes data integrity at the source, ensuring that all input via the user interface is validated and reliable. The system will introduce intelligent automation to handle the heavy lifting: sending instant order confirmations, dynamically updating loyalty tiers based on purchasing behavior, and triggering warehouse alerts for low stock. By automating these touchpoints, HandsMen Threads will secure a more efficient operational model that minimizes human error and maximizes customer satisfaction.

Project Scope and Objective

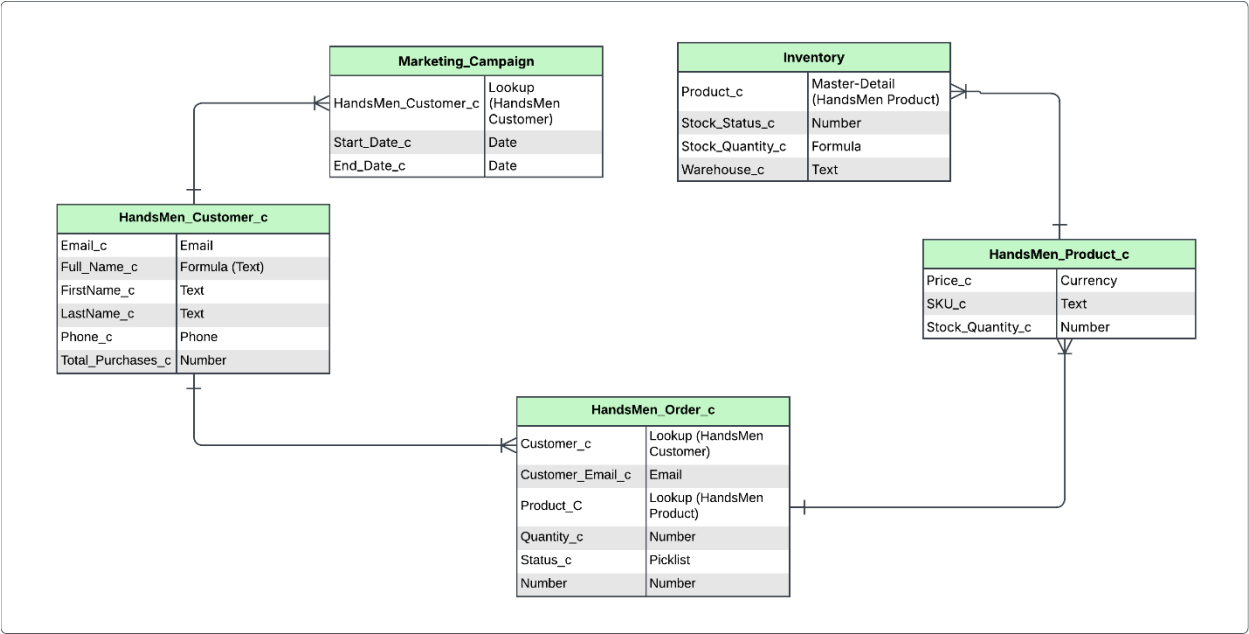
The HandsMen Threads Salesforce CRM project aims to deliver the following technical solutions to achieve specific business outcomes:

- Centralization of Customer, Order, and Inventory data into a single Salesforce environment to ensure data accuracy, eliminate silos, and support reliable, real-time decision-making.
- Implementation of workflows for order confirmations, tiered loyalty updates (Bronze/Silver/Gold), and low-stock alerts to enhance customer engagement and prevent stock shortages while reducing manual error.
- Development of scheduled batch processes and backend Apex logic to streamline end-of-day operations and efficiently handle high-volume updates.

- Configuration of custom Objects, Fields, and Page Layouts with strict validation rules to ensure data integrity is maintained at the source (the UI) and workflows match specific business needs.
- Deployment of real-time dashboards and reporting tools to provide leadership with instant operational insights and inventory tracking capabilities.
- Delivery of a robust, scalable architecture alongside comprehensive user training to ensure smooth adoption immediately and support the business’s future growth.

Data Model

During planning, an Entity-Relationship Diagram is developed to visualize the relationship and fields of each entity or objects to make the project data relationship clear and normalized.



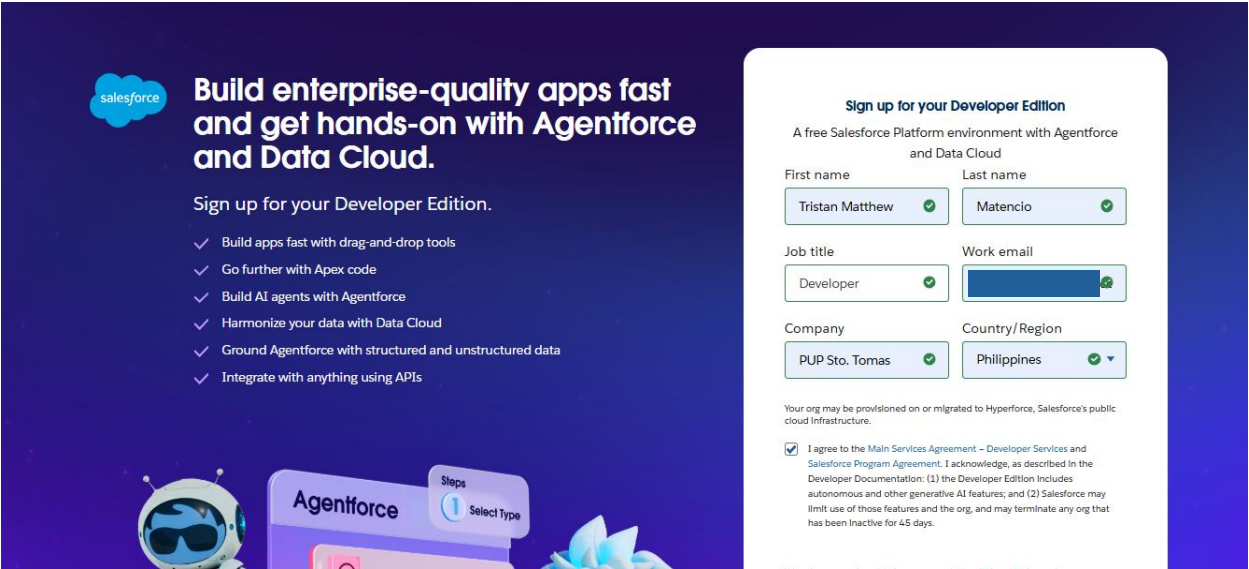
Security Model

To implement security in the CRM, a security model defining the access control of the users and the customer is developed.

Role	Permission	Access
Sales Manager	Read, Create, Edit	Customers and Orders
Inventory Manager	Read, Create, Edit	Marketing campaigns
Marketing Manager	Read, Edit	Inventory and Products

PHASE 2: SALESFORCE DEVELOPMENT – BACKEND AND CONFIGURATIONS

Environment Setup and DevOps Workflow



To setup the environment, a developer edition playground is used provided by Salesforce. An email is sent to confirmed and verify the account and password was reset to grant access to the playground.

Customization of Objects, Fields, Validation Rules, Automation

The following custom objects were created for the project:

- **HandsMen Order** – Stored order details such as product name, order status, and total amount.
- **HandsMen Product** – Stored product details such as product name, price, SKU, and quantity.
- **HandsMen Customer** – Stored the customer details such as contact number, name, email, loyalty status, and total purchases.
- **Inventory** – Stored the inventory details such as product, stock quantity, and warehouse location.
- **Marketing Campaign** – Stored the marketing campaign and promotions including customer name, start date, and end date.

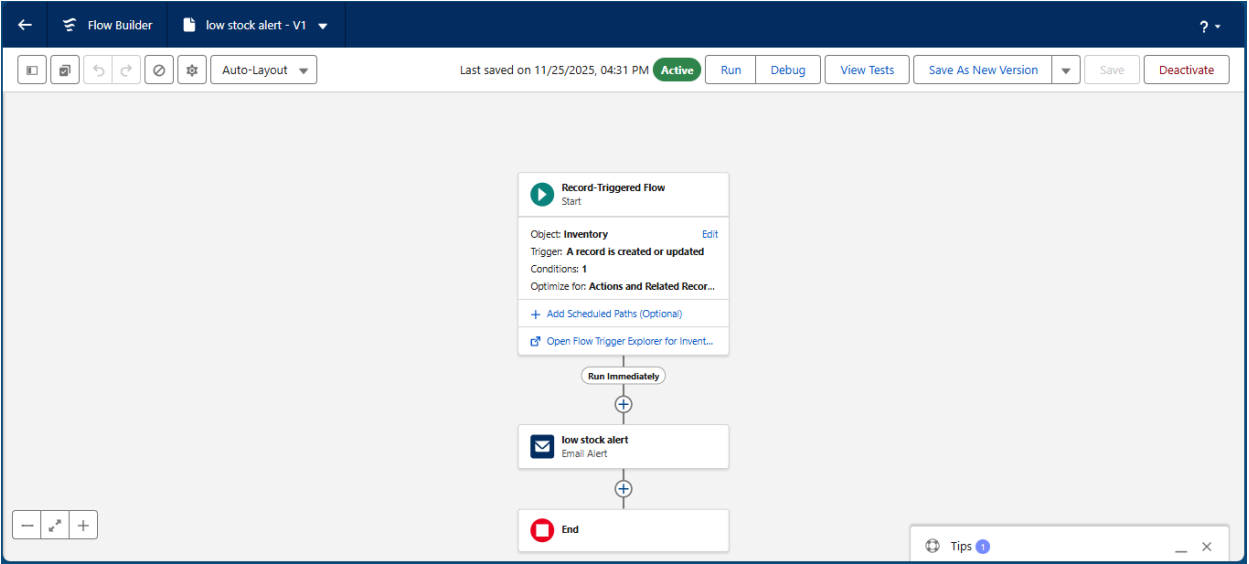
Validation Rules

The following validation rules were set to ensure data accuracy and stock management.

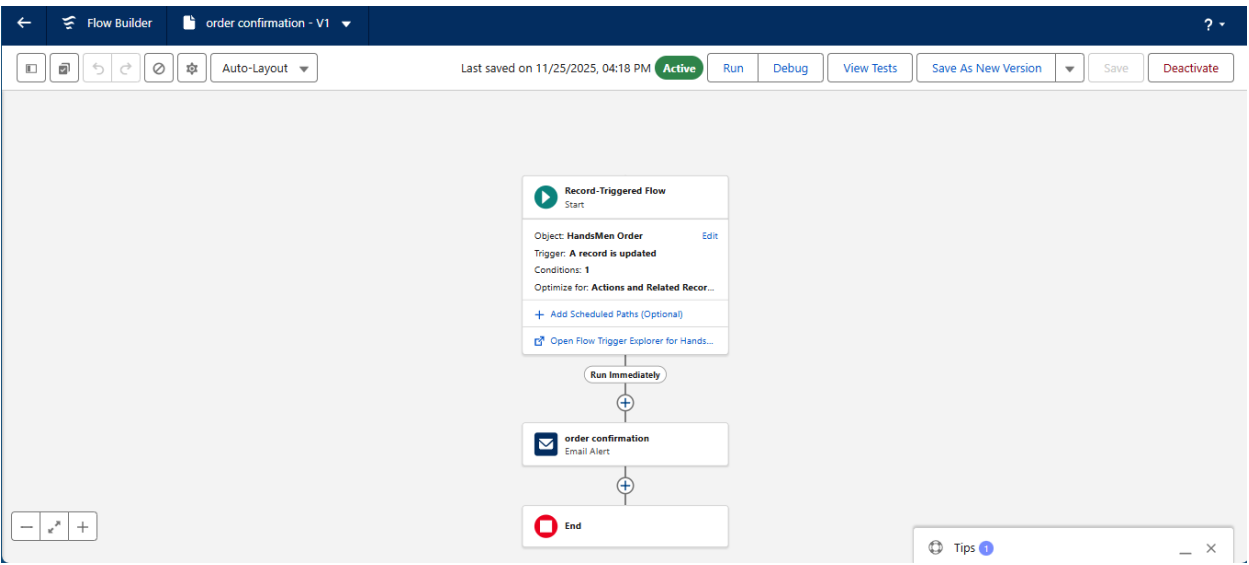
Object	Validation Rule
HandsMen Order	If total amount is less than 0, return
HandsMen Customer	If email does not contain ‘gmail.com’, return
Inventory	If stock quantity is less than 0, return

Automation Flows

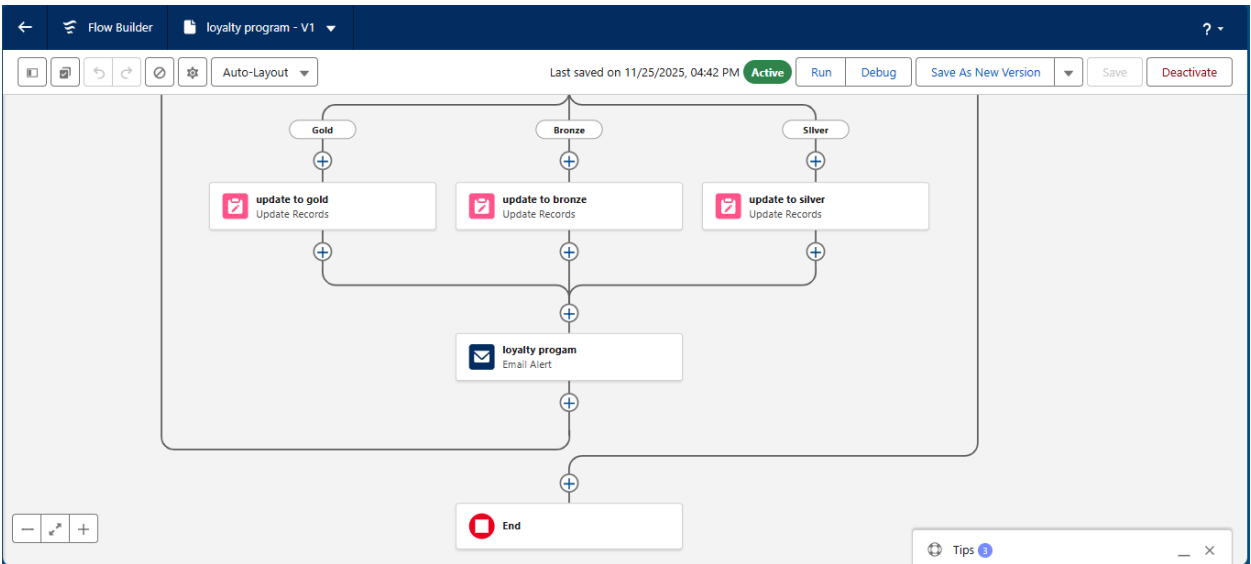
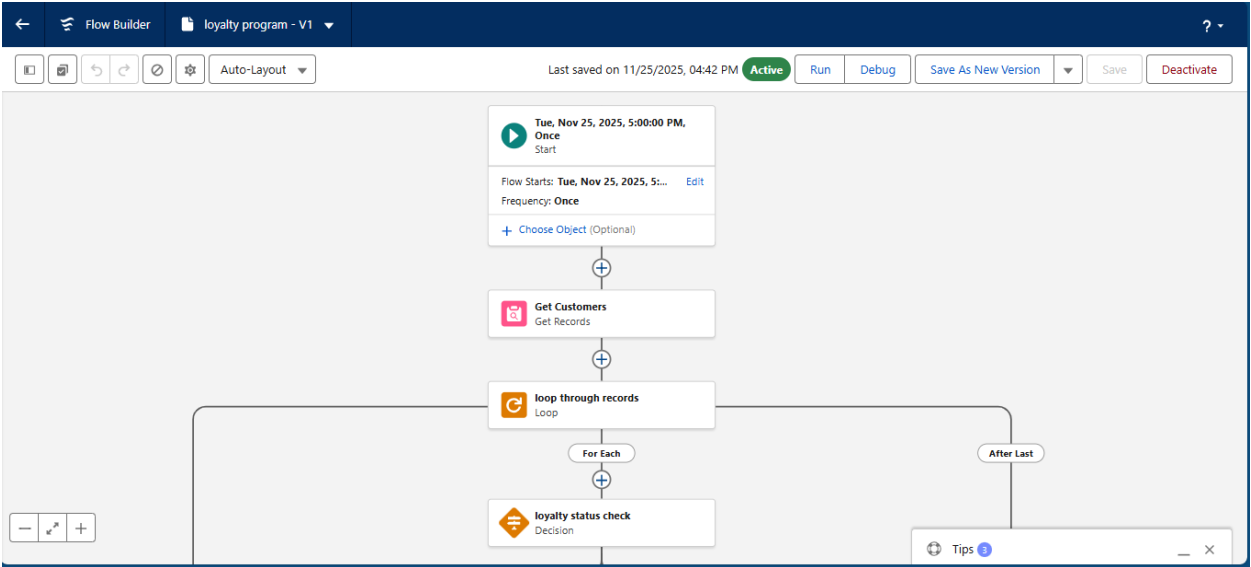
1. **Low Stock Alert** – Uses a record-trigger flow that is triggered when stock quantity is less than 5, then sends an email to inventory manager.



2. **Order Confirmed** – Once an order is confirmed, send an email to customer.



- **Loyalty Status Update** – Once a total purchases reaches certain amount, loyalty status changes into Bronze, Silver, or Gold.



Apex Classes and Triggers

1. Order Total Trigger

```
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
14    for (HandsMen_Order__c order : Trigger.new) {
15        if (order.HandsMen_Product__c != null && productMap.containsKey(order.HandsMen_Product__c)) {
16            HandsMen_Product__c product = productMap.get(order.HandsMen_Product__c);
17            if (order.Quantity__c != null) {
18                order.Total_Amount__c = order.Quantity__c * product.Price__c;
19            }
20        }
21    }
22 }
```

2. Stock Deduction Trigger

```
1 ▼ trigger StockDeductionTrigger on HandsMen_Order__c (after insert, after update) {
2     Set<Id> productIds = new Set<Id>();
3
4     for (HandsMen_Order__c order : Trigger.new) {
5         if (order.Status__c == 'Confirmed' && order.HandsMen_Product__c != null) {
6             productIds.add(order.HandsMen_Product__c);
7         }
8     }
9
10    if (productIds.isEmpty()) return;
11
12    Map<Id, Inventory__c> inventoryMap = new Map<Id, Inventory__c>(
13        [SELECT Id, Stock_Quantity__c, HandsMen_Product__c
14         FROM Inventory__c
15         WHERE HandsMen_Product__c IN :productIds]
16    );
17
18    List<Inventory__c> inventoriesToUpdate = new List<Inventory__c>();
19
20    for (HandsMen_Order__c order : Trigger.new) {
21        if (order.Status__c == 'Confirmed' && order.HandsMen_Product__c != null) {
22            for (Inventory__c inv : inventoryMap.values()) {
23                if (inv.HandsMen_Product__c == order.HandsMen_Product__c) {
24                    inv.Stock_Quantity__c -= order.Quantity__c;
25                    inventoriesToUpdate.add(inv);
26                }
27            }
28        }
29    }
30    break;
```

3. Inventory Batch Job Class

```
1 ▼ global class InventoryBatchJob implements Database.Batchable<SObject>, Schedulable {
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 ▼ global void execute(Database.BatchableContext BC, List<SObject> records) {
14
15     List<HandsMen_Product__c> productsToUpdate = new List<HandsMen_Product__c>();
16
17     // Cast SObject list to Product__c list
18
19     for (SObject record : records) {
20
21         HandsMen_Product__c product = (HandsMen_Product__c) record;
22
23         product.Stock_Quantity__c += 50; // Restock logic
24
25         productsToUpdate.add(product);
26
27     }
28
29     if (!productsToUpdate.isEmpty()) {
30
```

PHASE 3: UI/UX DEVELOPMENT AND CUSTOMIZATION

Lightning App Setup

←

Lightning App Builder

App Settings

Pages

HandsMen Threads

App Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

* App Name

HandsMen Threads

* Developer Name


HandsMen_Threads

Description

This lightning app contains the necessary features and purpose of HandsMen Threads

App Branding

Image




Primary Color Hex Value

#0070D2

Org Theme Options

☐ Use the app's image and color instead of the org's custom theme

App Launcher Preview



HandsMen Threads
This lightning app contains the necessary features and...

Page Layouts and Dynamic Forms

1. HandsMen Product

Cloud

HandsMen Threads

HandsMen Customer

HandsMen Products

HandsMen Orders

Inventories

Marketing Campaigns

Reports

Dashboards

Accounts

Contacts

Search...

Star

Share

Help

Settings

Notifications

User

HandsMen Product

Hoodie

New Contact

Edit

New Opportunity

Related

Details

HandsMen Product Name

Hoodie

HandsMen Order

SKU

Price

\$20

Stock Quantity

2,000

Created By

Tristan Matthew Matencio · 11/27/2025, 1:51 AM

Owner

Tristan Matthew Matencio

Last Modified By

Tristan Matthew Matencio · 11/27/2025, 1:51 AM


New HandsMen Product

* = Required Information


Information

* HandsMen Product Name

Owner

 Tristan Matthew Matencio

HandsMen Order



SKU

Price

Stock Quantity

Cancel

Save & New

Save

2. HandsMen Order

HandsMen Threads

HandsMen Customer

HandsMen Products

HandsMen Orders

Inventorys

Marketing Campaigns

Reports

Dashboards

Accounts

Contacts

Q Search...

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👤

HandsMen Order

🚚

O-0015

New Contact

Edit

New Opportunity

Related

Details

HandsMen OrderNumber

O-0015

HandsMen Customer

Mica Anoyo

HandsMen Product

Sweat Pants

Status

Confirmed

Quantity

443

Total Amount

17,277

Customer Email

vince428.oct@gmail.com

Created By

Tristan Matthew Matencio

Owner

Tristan Matthew Matencio

Last Modified By

Tristan Matthew Matencio

11/27/2025, 3:09 AM

11/27/2025, 3:13 AM

New HandsMen Order

* = Required Information

Information

HandsMen OrderNumber

Owner

HandsMen Customer

Tristan Matthew Matencio

HandsMen Product

Search HandsMen Products...

Status

--None--

Quantity

Total Amount

* Customer Email

Cancel

Save & New

Save

3. HandsMen Customer

HandsMen ThreadsHandsMen CustomerHandsMen ProductsHandsMen OrdersInventoriesMarketing CampaignsReportsDashboardsAccountsContacts

Q Search...

HandsMen Customer

Mica Anoyo

New ContactEditNew Opportunity

RelatedDetails

HandsMen Customer Name

Mica Anoyo

Email

vince428.oct@gmail.com

Phone

Loyalty Status

Silver

FirstName

Mica

LastName

Anoyo

FullName

Mica Anoyo

Total Purchases

600

Created By

Tristan Matthew Matencio · 11/27/2025, 12:07 AM

Owner

Tristan Matthew Matencio

Last Modified By

Orgfam EPIC · 11/27/2025, 3:00 AM

New HandsMen Customer

* = Required Information

Information

* HandsMen Customer Name

Email

Phone

Loyalty Status

--None--

FirstName

LastName

Total Purchases

Owner

Tristan Matthew Matencio

Cancel

Save & New

Save

4. Inventory

HandsMen Threads

HandsMen Customer

HandsMen Products

HandsMen Orders

Inventories

Marketing Campaigns

Reports

Dashboards

Accounts

Contacts

Q Search...

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Inventory

I -0006

New Contact

Edit

New Opportunity

Related

Details

Inventory Number

I -0006

HandsMen Product

[Hoodie](#)

Stock Quantity

4999

Stock Status

Available

Warehouse

Shengzhan Sorting Center

Created By

[Tristan Matthew Matencio](#) · 11/27/2025, 1:51 AM

Last Modified By

[Tristan Matthew Matencio](#) · 11/27/2025, 2:08 AM

New Inventory

* = Required Information

Information

Inventory Number

* HandsMen Product

Search HandsMen Products...

Stock Quantity

Warehouse

Cancel

Save & New

Save

5. Marketing Campaign

HandsMen Threads

HandsMen Customer

HandsMen Products

HandsMen Orders

Inventories

Marketing Campaigns

Reports

Dashboards

Accounts

Contacts

Q Search...

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👤

Marketing Campaign

MC -0001

New Contact

Edit

New Opportunity

Related

Details

Marketing Campaign Number

MC -0001

HandsMen Customer

[Mica Anoyo](#)

Start Date

11/27/2025

End Date

11/30/2025

Created By

[Tristan Matthew Matencio](#) · 11/27/2025, 12:32 AM

Owner

[Tristan Matthew Matencio](#)

Last Modified By

[Tristan Matthew Matencio](#) · 11/27/2025, 12:32 AM

New Marketing Campaign

* = Required Information

Information

Marketing Campaign Number

Owner

HandsMen Customer

Start Date

End Date

Tristan Matthew Matencio

Search HandsMen Customer...

Cancel

Save & New

Save

User Management

1. Niklaus Mikaelson – Set the role to be Sales Manager.

User Niklaus Mikaelson

Permission Set Assignments (1) | Permission Set Assignments: Activation Required (1) | Permission Set Group Assignments (1) | Permission Set License Assignments (1) | Personal Groups (1) | Public Group Membership (1) | Queue Membership (1) | Team (1) | Managers in the Role Hierarchy (1) | OAuth Apps (1) | Third-Party Account Links (1) | Built-In Authenticators (1) | Installed Mobile Apps (1) | Authentication Settings for External Systems (1) | Login History (1) | User Provisioning Accounts (1)

User Detail

Name: Niklaus Mikaelson

Alias: nmika

Email: vince428.oct@gmail.com

Username: vince428.oct@gmail.com

Nickname: User17640559307481522

Title:

Company:

Department:

Division:

Address:

Time Zone: (GMT-08:00) Pacific Standard Time (America/Los_Angeles)

Locale: English (United States)

Language: English

Delegated Approver:

Manager:

Receive Approval Request Emails: Only if I am an approver

Federation ID:

App Registration: One-Time Password Authenticator:

App Registration: Salesforce Authenticator:

Security Key (U2F or WebAuthn):

Lightning Login:

Temporary Verification Code (Expires in 1 to 24 Hours):

Role: Sales

User License: Salesforce

Profile: Platform 1

Active:

Marketing User:

Offline User:

Knowledge User:

Flow User:

Service Cloud User:

Site.com Contributor User:

Site.com Publisher User:

WDC User:

Mobile Push Registrations:

Data.com User Type:

Accessibility Mode (Classic Only):

Debug Mode:

High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling:

Salesforce CRM Content User:

Receive Salesforce CRM Content Email Alerts:

Receive Salesforce CRM Content Alerts as Daily Digest:

Make Setup My Default Landing Page:

Allow Forecasting:

No MRU Updates:

Call Center:

Phone:

2. Kol Mikaelson – Set the role to be Inventory Manager

User Kol Mikaelson

Permission Set Assignments (1) | Permission Set Assignments: Activation Required (1) | Permission Set Group Assignments (1) | Permission Set License Assignments (1) | Personal Groups (1) | Public Group Membership (1) | Queue Membership (1) | Team (1) | Managers in the Role Hierarchy (1) | OAuth Apps (1) | Third-Party Account Links (1) | Built-In Authenticators (1) | Installed Mobile Apps (1) | Authentication Settings for External Systems (1) | Login History (1) | User Provisioning Accounts (1)

User Detail

Name: Kol Mikaelson

Alias: kmika

Email: vince428.oct@gmail.com

Username: vince428.oct@gmail.com

Nickname: User17640560162694184081

Title:

Company:

Department:

Division:

Address:

Time Zone: (GMT-08:00) Pacific Standard Time (America/Los_Angeles)

Locale: English (United States)

Language: English

Delegated Approver:

Manager:

Receive Approval Request Emails: Only if I am an approver

Federation ID:

App Registration: One-Time Password Authenticator:

App Registration: Salesforce Authenticator:

Security Key (U2F or WebAuthn):

Lightning Login:

Temporary Verification Code (Expires in 1 to 24 Hours):

Role: Inventory

User License: Salesforce

Profile: Platform 1

Active:

Marketing User:

Offline User:

Knowledge User:

Flow User:

Service Cloud User:

Site.com Contributor User:

Site.com Publisher User:

WDC User:

Mobile Push Registrations:

Data.com User Type:

Accessibility Mode (Classic Only):

Debug Mode:

High-Contrast Palette on Charts:

Load Lightning Pages While Scrolling:

Salesforce CRM Content User:

Receive Salesforce CRM Content Email Alerts:

Receive Salesforce CRM Content Alerts as Daily Digest:

Make Setup My Default Landing Page:

Allow Forecasting:

No MRU Updates:

Call Center:

Phone:

3. Daniel Mikaelson – Set the role to be Marketing Manager

User

Daniel Mikaelson

Permission Set Assignments

Permission Set Assignments: Activation Required

Permission Set Group Assignments

Permission Set License Assignments

Personal Groups

Public Group Membership

Queue Membership

Team

Managers in the Role Hierarchy

OAuth Apps

Third-Party Account Link

Built-in Authentication

Installed Mobile App

Authentication Settings for External Systems

Login History

User Provisioning Accounts

User Detail

Edit

Sharing

Reset Password

Freeze

View Summary

Name	Daniel Mikaelson	Role	Marketing
Alias	dmika	User License	Salesforce
Email	vince428.oct@gmail.com Verify	Profile	Platform 1
Username	vince428.oct1000@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User17640566045139240400 i	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT-08:00) Pacific Standard Time (America/Los_Angeles)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (United States)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	i
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> i
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> i
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/> i
App Registration: One-Time Password Authenticator	i	Lead Lightning Pages While Scrolling	<input checked="" type="checkbox"/> i
App Registration: Salesforce Authenticator	i	Salesforce CRM Content User	<input checked="" type="checkbox"/>
Security Key (U2F or WebAuthn)	i	Receive Salesforce CRM Content Email Alerts	<input checked="" type="checkbox"/>
Lightning Login	i	Receive Salesforce CRM Content Alerts as Daily Digest	<input checked="" type="checkbox"/>
Temporary Verification Code (Expires in 1 to 24 Hours)	Generate i	Make Setup My Default Landing Page	<input type="checkbox"/>
		Allow Forecasting	<input type="checkbox"/>
		No MRU Updates	<input type="checkbox"/> i
		Call Center	
		Phone	

Reports and Dashboard

1. Reports- Displayed the user interface for showing reports for customer list, orders, products, inventories, and marketing campaign.

Report: HandsMen Customer

New HandsMen Customer Report

Enable Field Editing

Q

Add Chart

Y

CP

Edit

▼

Total Records

5

Total Total Purchases

3,700

HandsMen Customer: HandsMen Customer Name	Loyalty Status	Total Purchases
1 John	Bronze	500
2 Mark Louie Villanueva	Bronze	500
3 Mica Anoyo	Bronze	-
4 Michael Jordan	Gold	1,500
5 Austine Jade Bernardo	Gold	1,200
6		3,700

2. Dashboard – Displayed the user interface for showing dashboard for customer list, orders, products, inventories, and marketing campaign.

Dashboard

Handsmen Dashboard

Refresh

Edit

Subscribe

▼

As of Nov 27, 2025, 12:36 AM

Viewing as Tristan Matthew Malencio

New HandsMen Customer Report

HandsMen Customer: HandsMen Customer Name	Loyalty Status	Total Purchases
Austine Jade Bernardo	Gold	1k
John	Bronze	500
Mark Louie Villanueva	Bronze	500
Mica Anoyo	Bronze	-
Michael Jordan	Gold	2k

View Report (New HandsMen Customer Report)

As of Nov 27, 2025, 12:36 AM

New HandsMen Products Report

HandsMen Product: HandsMen Product Name	HandsMen Product: ID	Stock Quantity
ALC Shirt with Backprint	a01gl00000WV0tu	-
Muscle Tee	a01gl00000WVPwv	-
Oversized Shirt	a01gl00000WVK6v	2k
Shorts	a01gl00000WbXnQ	-
Shorts	a01gl00000WbbkY	-
T Shirt	a01gl00000Wb6nQ	-

View Report (New HandsMen Products Report)

As of Nov 27, 2025, 12:36 AM

New HandsMen Orders Report

HandsMen Order: HandsMen OrderN...	HandsMen...	HandsMen C...	Customer Email	Qu...
O-0001	a02gl00000C	John	vince428.oct@gmail.co	-
O-0002	a02gl00000C	John	john@example.com	500
O-0003	a02gl00000C	John	john@example.com	600
O-0004	a02gl00000C	Austine Jade Bernardo	tristanmatmivio20@gn	600
O-0005	a02gl00000C	Austine Jade Bernardo	tristanmatmivio20@gn	700
O-0006	a02gl00000C	Mica Anoyo	vince428.oct@gmail.co	600

View Report (New HandsMen Orders Report)

As of Nov 27, 2025, 12:36 AM

Marketing Campaign Reports

Marketing Campaign: Marketing Campaign ...	HandsMen Customer: HandsMen Custo...	St...	En...
MC -0001	Mica Anoyo	11/27	11/30

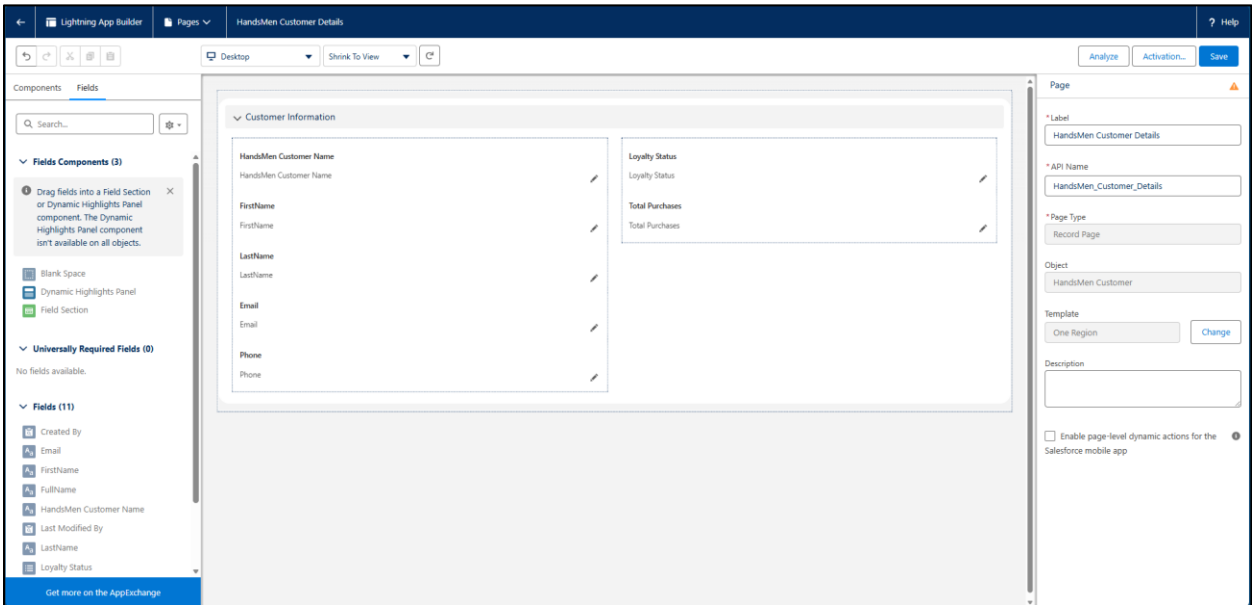
View Report (Marketing Campaign Reports)

As of Nov 27, 2025, 12:36 AM

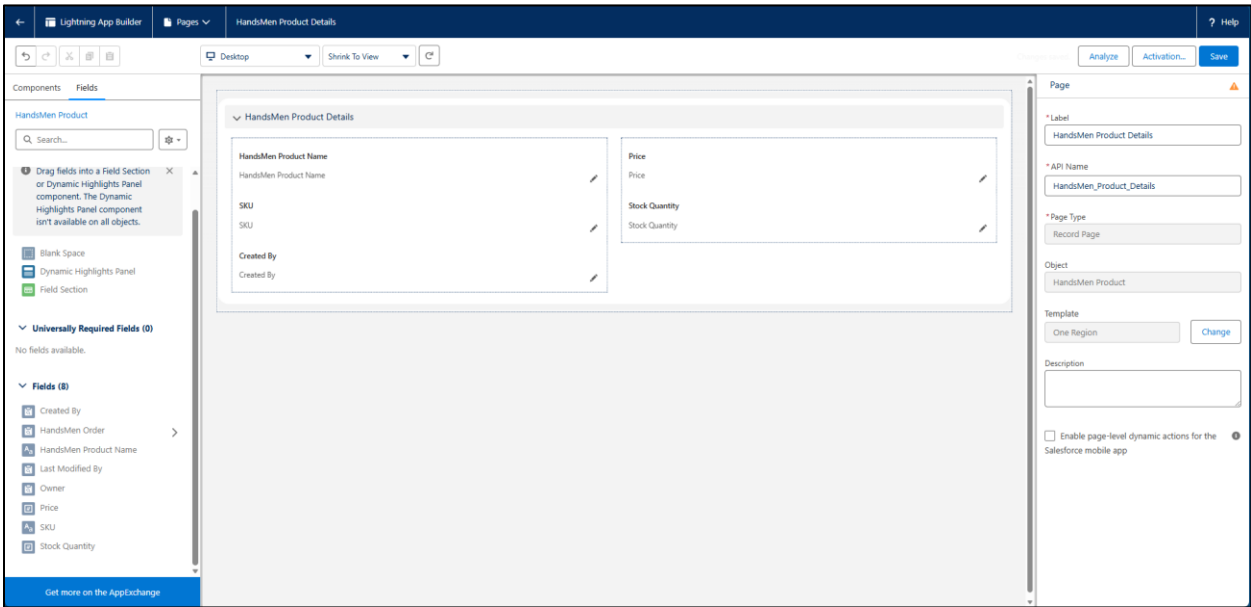
Lightning Pages

Lightning pages has been created to design the user interface using drag and drop components available in the lightning app builder.

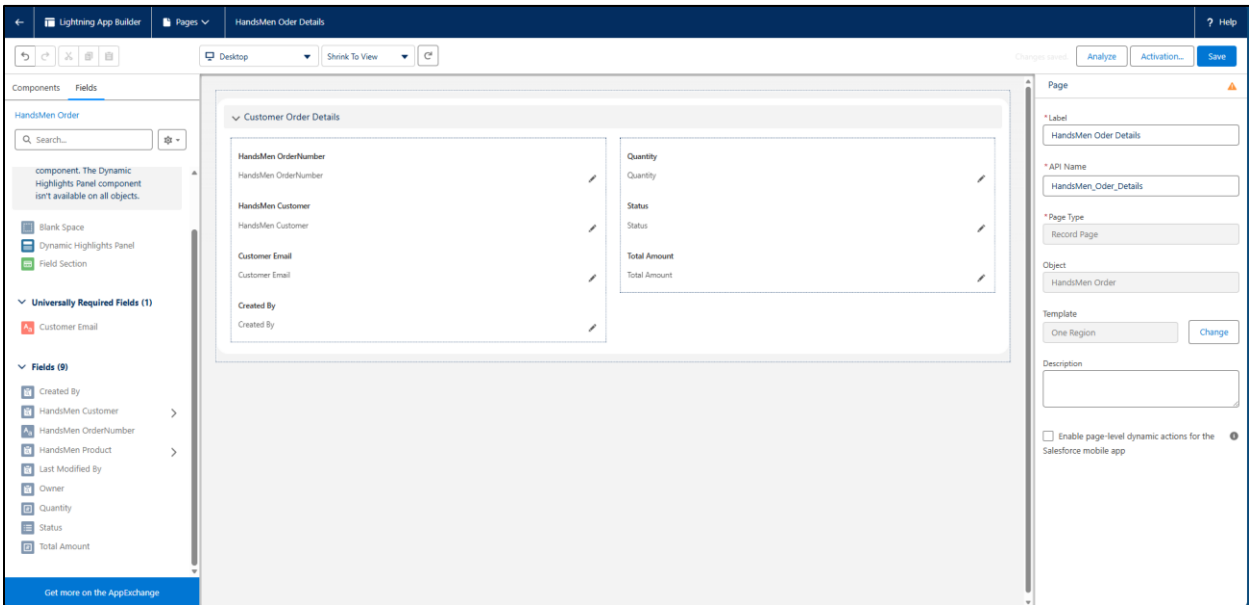
1. HandsMen Customer



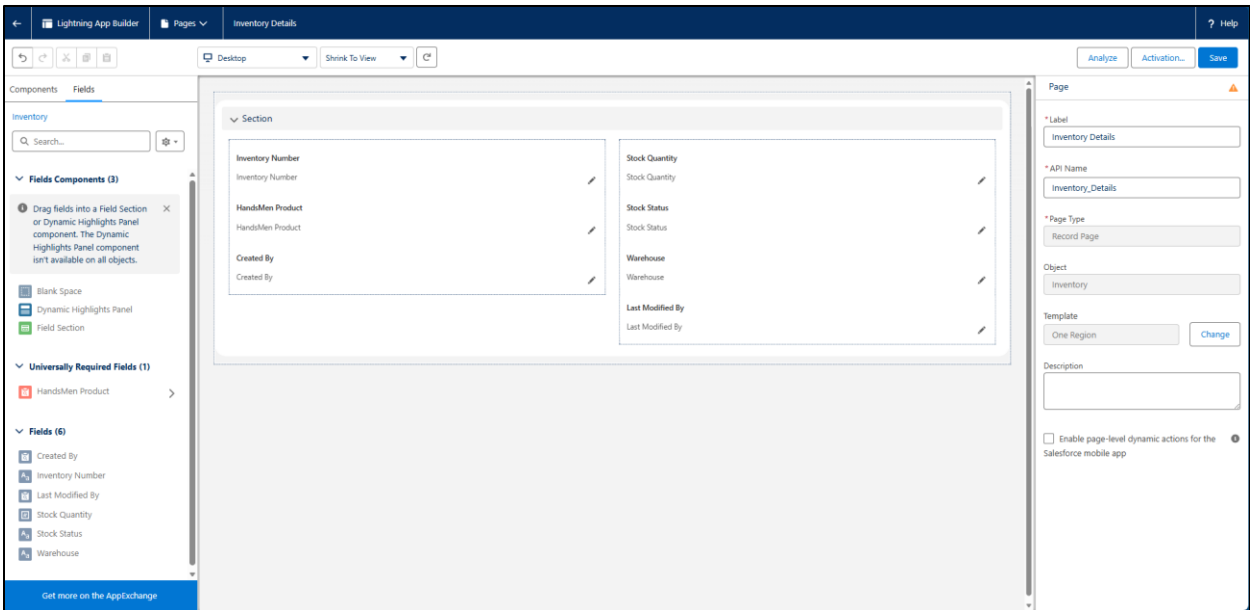
2. HandsMen Product



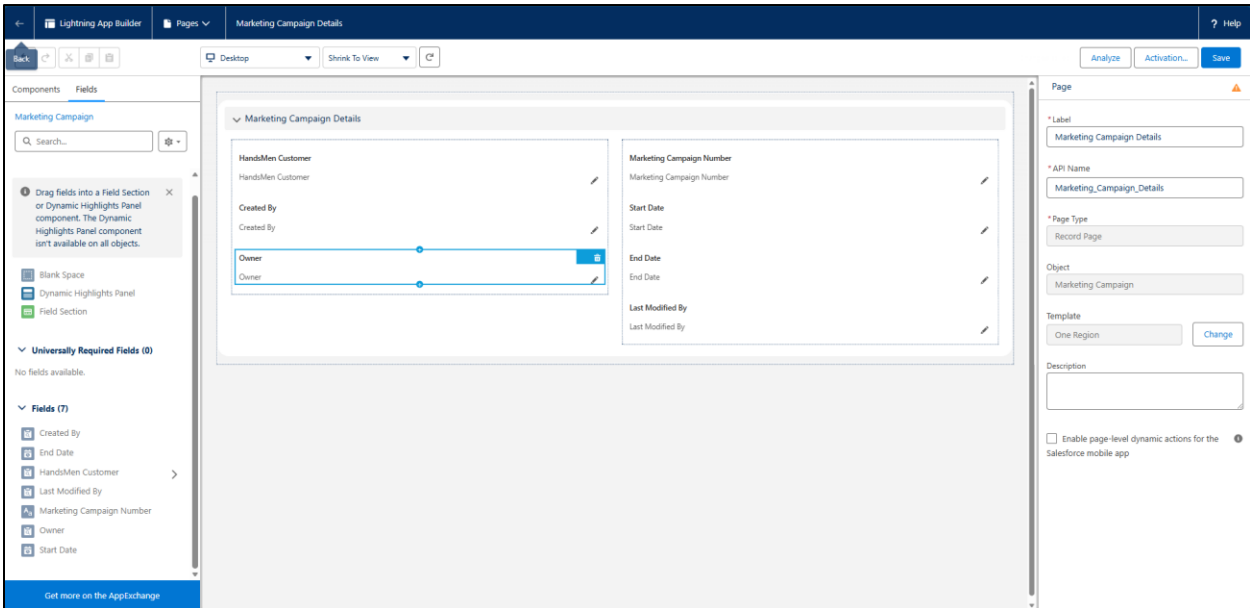
3. HandsMen Order



4. Inventory



5. Marketing Campaign



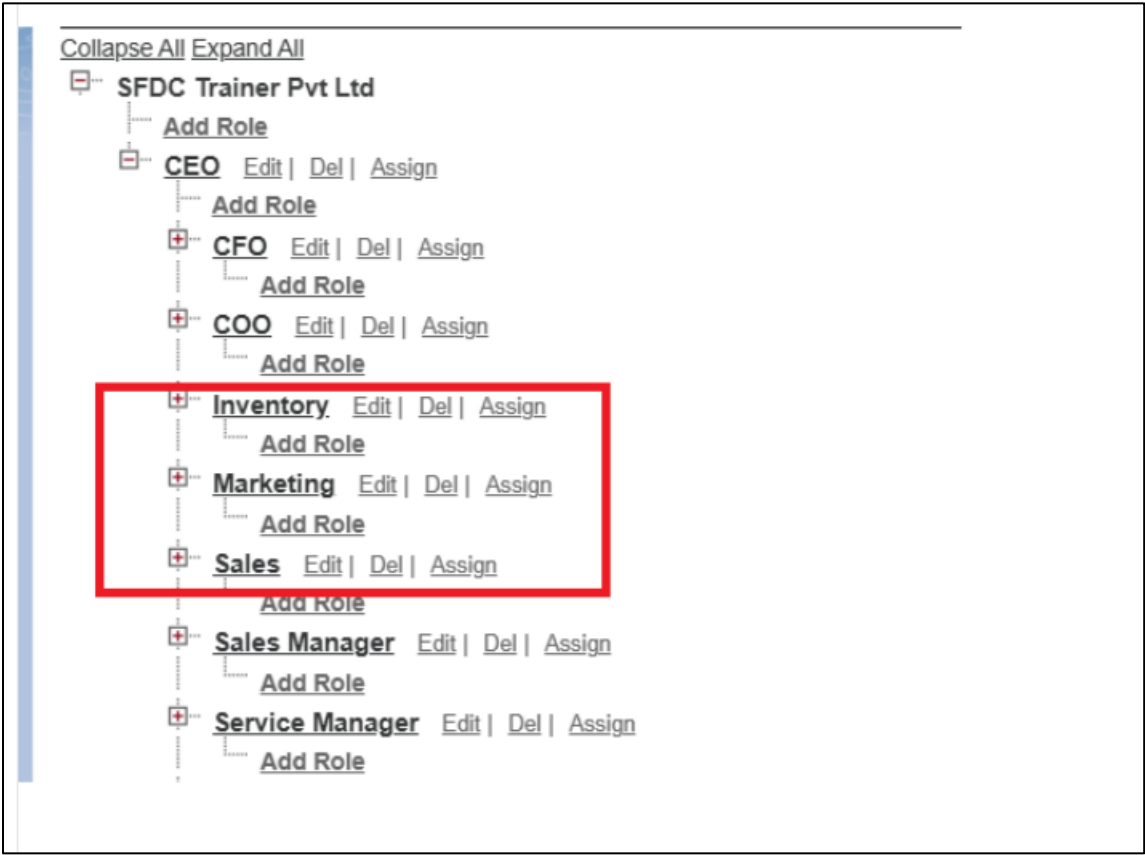
PHASE 4: DATA MIGRATION, TESTING AND SECURITY

Profile and Roles

Standard Salesforce profiles, including **Standard User** and **System Administrator**, were used to manage access within the system. The System Administrator profile allowed full visibility and control over all configurations, settings, and data, enabling complete system management. Meanwhile, the Standard User profile provided access only to the objects and records required for daily business tasks, ensuring users could perform their responsibilities without exceeding necessary privileges. This profile setup ensured secure, well-structured access control while maintaining smooth and efficient operations across the organization.

Role Hierarchy

- 1. **CEO** - Holds the highest-level role with unrestricted access to all records and data across the organization.
- 2. **Sales Team** - Reports directly to the CEO and is responsible for managing customer orders, tracking transactions, and overseeing sales-related activities.
- 3. **Inventory Team** - Operates under the CEO and manages product records, stock levels, and inventory updates to support accurate operational tracking.
- 4. **Marketing Team** - Also reports to the CEO and focuses on handling marketing campaigns, promotions, and customer engagement data.



Permission Sets

Below are the permission sets for each role in the Salesforce CRM HandsMen Threads:

Role	Permissions
Sales Manager	Read, Edit in Customers and Orders
Inventory Manager	Read, Edit, Delete in Inventory and Products
Marketing Manager	Read, Edit in Marketing Campaigns and Promotions

PHASE 5: DEPLOYMENT, DOCUMENTATION AND MAINTENANCE

Development Strategy and Quality Assurance

- **Rapid Deployment** - All customizations, including objects, fields, flows, and Apex code were implemented and tested directly within the main Salesforce production environment. This 'Test in Prod' approach, carefully managed, eliminated complex migration steps (like Sandboxes/Change Sets) and allowed for immediate, high-confidence deployment of validated features, ensuring a rapid go-live.

Maintenance and Monitoring

- **Proactive System Health** - Maintenance involves continuous monitoring of key health indicators: system utilization, Apex job performance, and error logs (Debug, Flow, and Validation). Routine checks will include reviews of all automation logic, data integrity validation, and timely updates to page layouts, profiles, and permission sets to reflect dynamic organizational needs.

Troubleshooting Approach

- **Root Cause Analysis (RCA)** - The approach is to move quickly from error detection (via logs or user reports) to Root Cause Analysis. Issues are systematically addressed by diagnosing the cause (e.g., data anomalies, permission restrictions, or faulty automation logic), implementing and testing the fix (using both manual and automated verification), and documenting the resolution within a knowledge base for future reference.

CONCLUSION

The customized Salesforce CRM for HandsMen Threads is a foundational success, moving the organization from manual processes to agile, automated operations. The system's immediate impact includes minimized human error, substantial reduction in processing time for orders and inventory, and the establishment of a single source of truth for all customer data. The architecture provides a secure, role-based data visibility framework that maintains operational integrity. Critically, the platform's native scalability and capacity to support future integrations, machine learning initiatives, and advanced reporting ensure HandsMen Threads is equipped not only for current efficiency but for long-term strategic growth and informed, data-driven decision-making.

RECOMMENDATIONS

- 1. Implement Einstein AI Features** - Introduce Einstein Lead/Opportunity Scoring to utilize predictive analytics, prioritizing sales efforts toward the highest-potential leads based on historical conversion data.
- 2. Configure Salesforce CPQ (Configure, Price, Quote)** - Implement CPQ for complex product or service bundles, tiered pricing, and discount management.
- 3. Establish Formal Data Governance** - Create a cross-departmental governance council with clearly defined Data Owners and Data Stewards for key business objects (e.g., Accounts, Orders, Inventory).