

# 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**

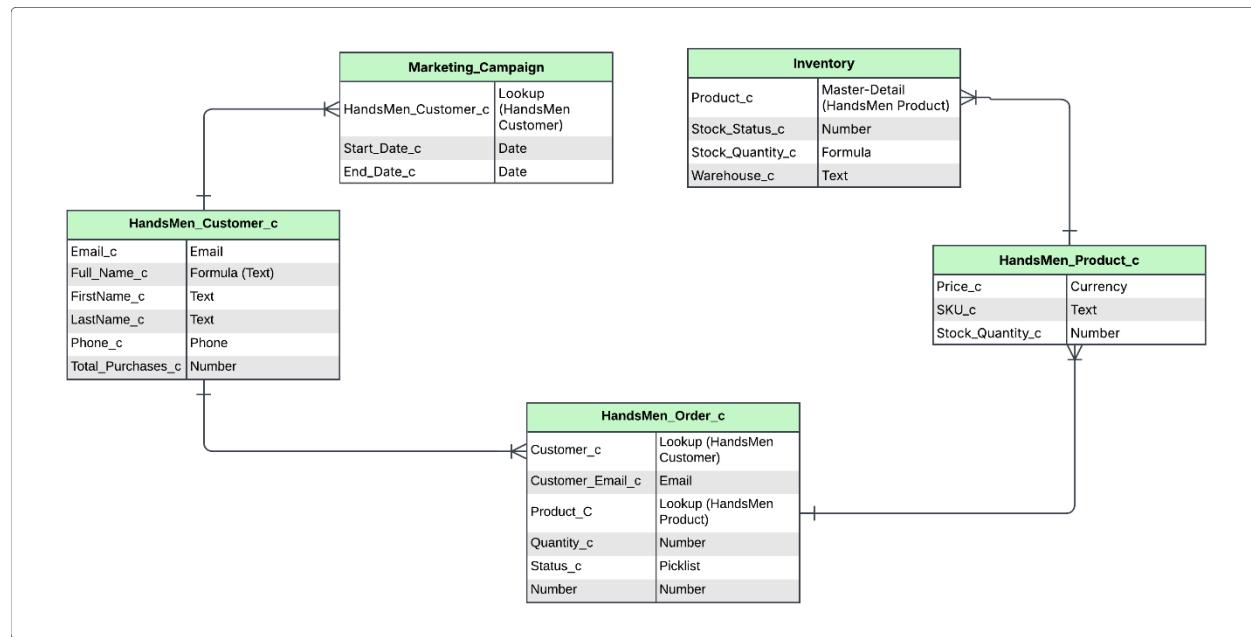
The HandsMen Threads Salesforce CRM project aims to deliver the following technical solutions to achieve specific business outcomes:

- 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.



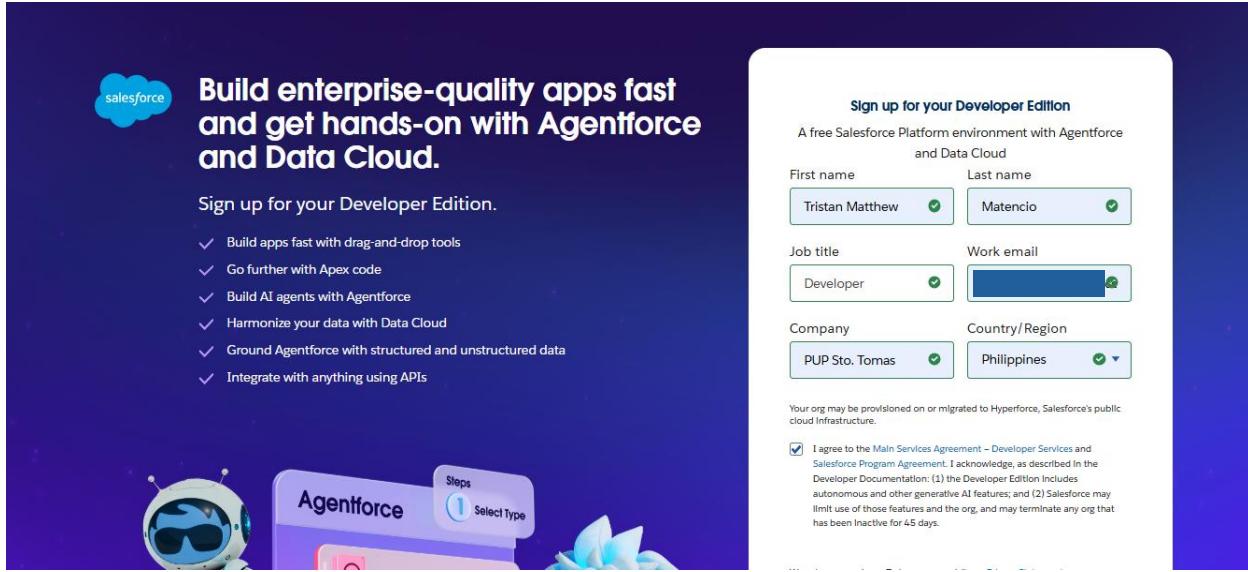
## Security Model

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.

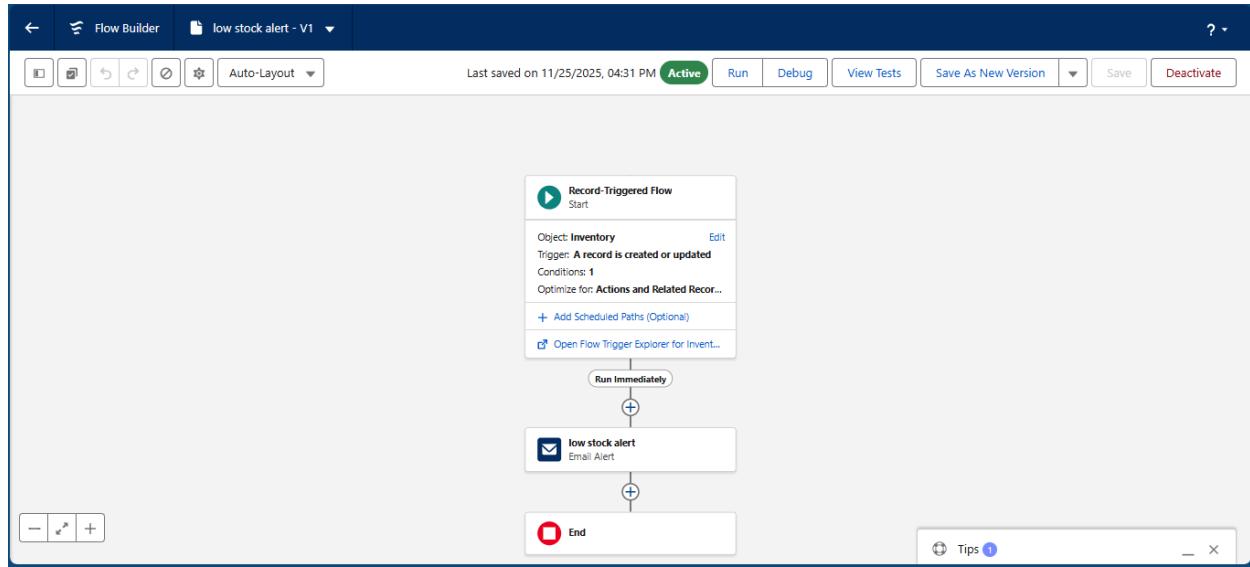
## Validation Rules

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

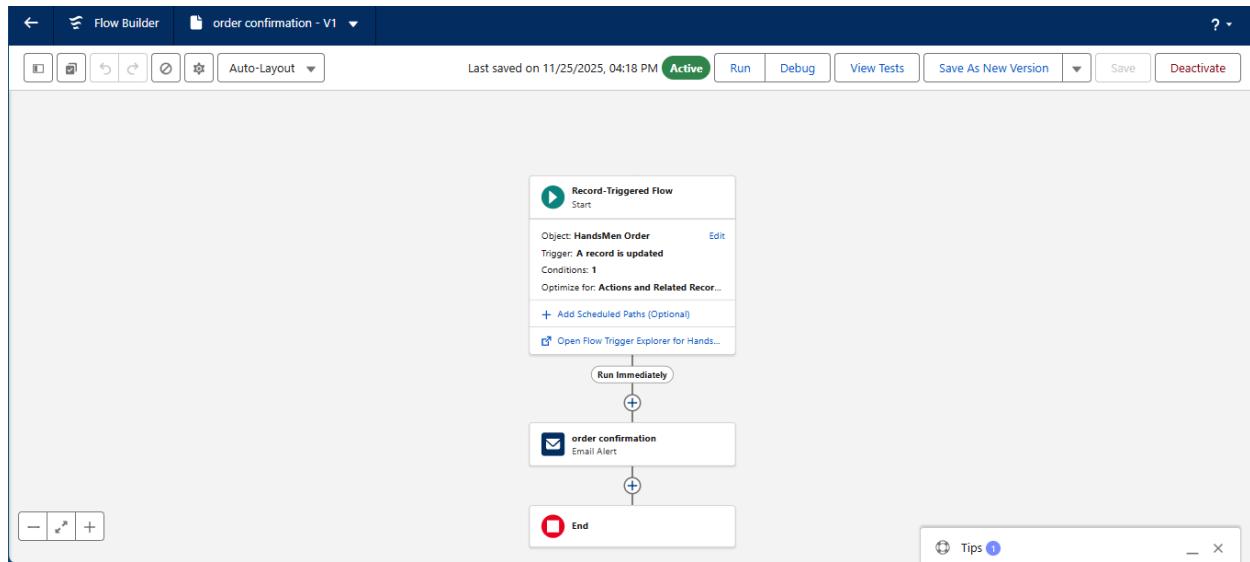
Object	Validation Rule
HandsMen Order	If total amount is less than 0, return
HandsMen Customer	If email does not contain 'gmail.com', return
Inventory	If stock quantity is less than 0, return

## Automation Flows

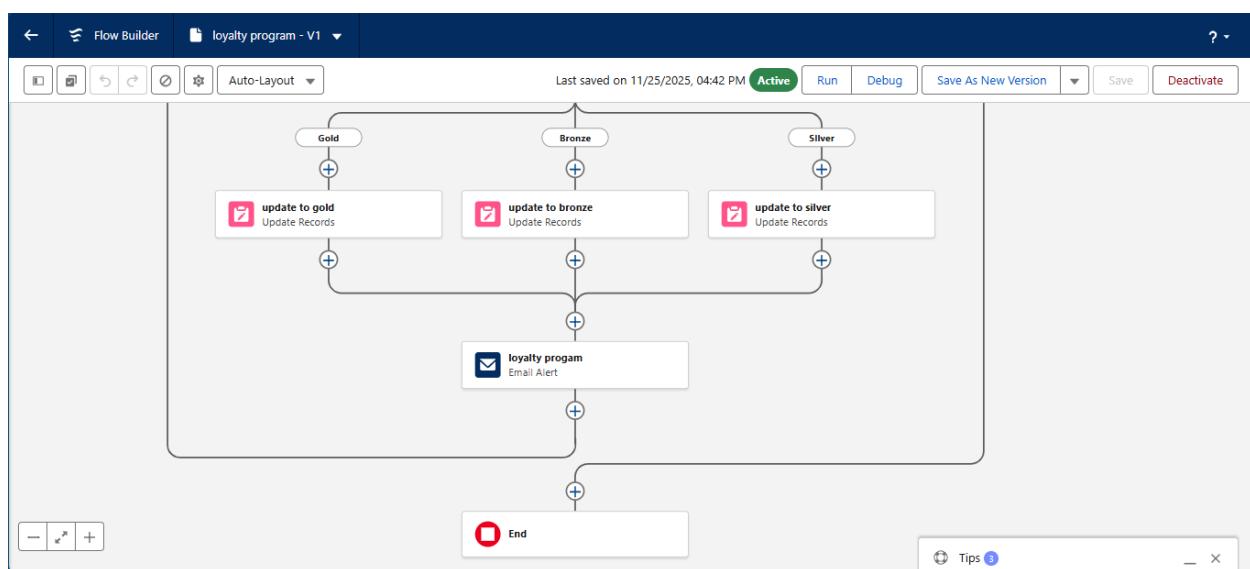
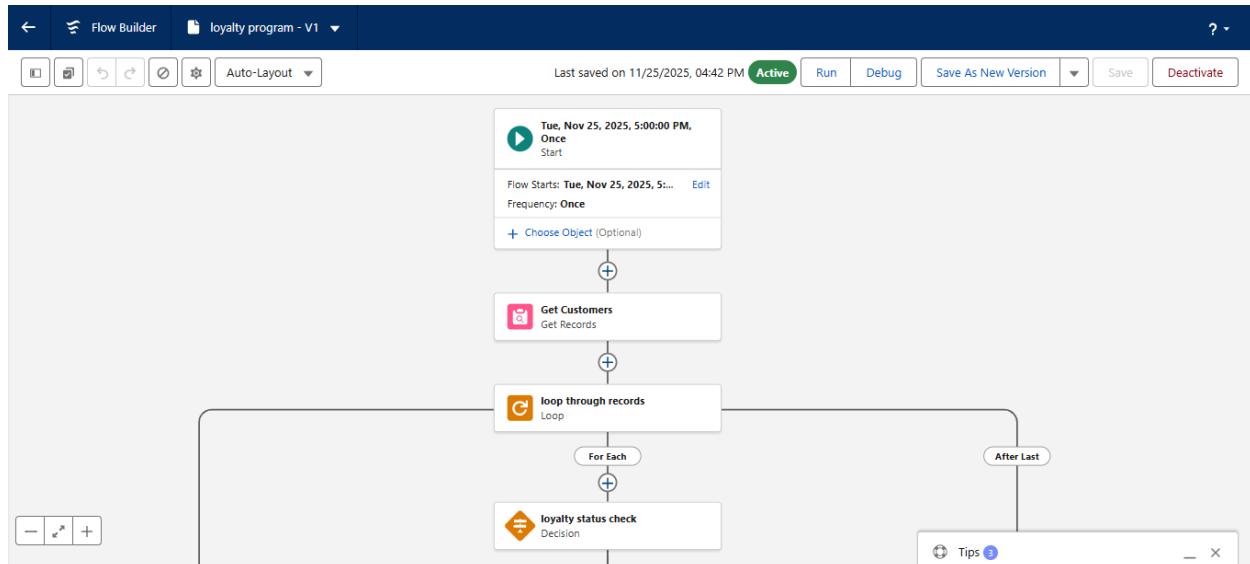
- Low Stock Alert** – Uses a record-triggered flow that is triggered when stock quantity is less than 5, then sends an email to inventory manager.



- 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}
```

## 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
31             ...
32         }
33     }
34
35     global void finish(Database.BatchableContext BC) {
36
37         ...
38     }
39 }
```

## PHASE 3: UI/UX DEVELOPMENT AND CUSTOMIZATION

### Lightning App Setup

The screenshot shows the 'App Details & Branding' section of the Lightning App Builder. On the left, a sidebar lists 'App Options', 'Utility Items (Desktop Only)', 'Navigation Items', and 'User Profiles'. The main area has two tabs: 'App Details' and 'App Branding'. In 'App Details', fields include 'App Name' (HandsMen Threads), 'Developer Name' (HandsMen\_Threads), and a 'Description' box (This lightning app contains the necessary features and purpose of HandsMen Threads). In 'App Branding', there is an 'Image' field containing a photo of a person in a red hoodie, a 'Primary Color Hex Value' field (#0070D2), and an 'Org Theme Options' checkbox. Below these are sections for 'App Launcher Preview' and 'App Details & Branding'.

### Page Layouts and Dynamic Forms

#### 1. HandsMen Product

The screenshot shows a product record page for 'Hoodie' under the 'HandsMen Products' tab. The top navigation bar includes 'HandsMen Threads', 'HandsMen Customer', 'HandsMen Products', 'HandsMen Orders', 'Inventory', 'Marketing Campaigns', 'Reports', 'Dashboards', 'Accounts', and 'Contacts'. The page header shows the product name 'Hoodie'. The main content area has tabs for 'Related' and 'Details'. Under 'Details', fields include 'HandsMen Product Name' (Hoodie), 'Owner' (Tristan Matthew Matencio), 'HandsMen Order', 'SKU', 'Price' (\$20), 'Stock Quantity' (2,000), 'Created By' (Tristan Matthew Matencio, 11/27/2025, 1:51 AM), and 'Last Modified By' (Tristan Matthew Matencio, 11/27/2025, 1:51 AM). Navigation icons at the top right include 'New Contact', 'Edit', and 'New Opportunity'.

**New HandsMen Product**

\* = Required Information

### Information

* HandsMen Product Name	Owner
<input type="text"/>	Tristan Matthew Matencio
HandsMen Order	
<input type="text"/> Search HandsMen Orders... <input type="button" value=""/>	
SKU	
<input type="text"/>	
Price	
<input type="text"/>	
Stock Quantity	
<input type="text"/>	

## 2. HandsMen Order

HandsMen Threads     Search...   

HandsMen Order    O-0015   

<input type="button" value="Related"/>	<input type="button" value="Details"/>
HandsMen OrderNumber O-0015	Owner Tristan Matthew Matencio
HandsMen Customer <a href="#">Mica Anyo</a>	
HandsMen Product <a href="#">Sweat Pants</a>	
Status Confirmed	
Quantity 443	
Total Amount 17,277	
Customer Email <a href="mailto:vince28.oct@gmail.com">vince28.oct@gmail.com</a>	
Created By <a href="#">Tristan Matthew Matencio</a> , 11/27/2025, 3:09 AM	Last Modified By <a href="#">Tristan Matthew Matencio</a> , 11/27/2025, 3:13 AM

**New HandsMen Order**

\* = Required Information

### Information

HandsMen OrderNumber	Owner
<input type="text"/>	Tristan Matthew Matencio
HandsMen Customer	
<input type="text"/> Search HandsMen Customer... <input type="button" value=""/>	
HandsMen Product	
<input type="text"/> Search HandsMen Products... <input type="button" value=""/>	
Status	<input type="text"/> --None--
Quantity	<input type="text"/>
Total Amount	<input type="text"/>
* Customer Email	<input type="text"/>

### 3. HandsMen Customer

The screenshot shows the HandsMen Customer details page. At the top, there's a navigation bar with links like 'HandsMen Threads', 'HandsMen Customer' (which is the active tab), 'HandsMen Products', 'HandsMen Orders', 'Inventory', 'Marketing Campaigns', 'Reports', 'Dashboards', 'Accounts', 'Contacts', and a search bar. Below the navigation is a header with the customer's name, 'Mica Anoyo', and a small profile icon. To the right of the name are buttons for 'New Contact', 'Edit', and 'New Opportunity'. The main content area is titled 'Details' and contains fields for 'HandsMen Customer Name' (Mica Anoyo), 'Email' (vince428.oct@gmail.com), 'Phone', 'Loyalty Status' (Silver), 'FirstName' (Mica), 'LastName' (Anoyo), 'FullName' (Mica Anoyo), 'Total Purchases' (600), and 'Created By' (Tristan Matthew Matencio). It also shows the 'Last Modified By' information (OrgFarm EPIC) and the date (11/27/2025, 3:00 AM).

### New HandsMen Customer

\* = Required Information

**Information**

\* HandsMen Customer Name

Owner  
Tristan Matthew Matencio

Email

Phone

Loyalty Status

FirstName

LastName

Total Purchases

## 4. Inventory

The screenshot shows the 'Inventory' section of the software. At the top, there's a navigation bar with links for 'HandsMen Customer', 'HandsMen Products', 'HandsMen Orders', 'Inventorys', 'Marketing Campaigns', 'Reports', 'Dashboards', 'Accounts', and 'Contacts'. Below the navigation is a search bar and a toolbar with buttons for 'New Contact', 'Edit', and 'New Opportunity'. The main area displays a single inventory item with the number 'I-0006'. The item details include:

- Inventory Number: I-0006
- HandsMen Product: Hoodie
- Stock Quantity: 4999
- Stock Status: Available
- Warehouse: Shenzhen 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

The screenshot shows a new inventory creation form titled 'New Inventory'. At the top right, there's a note: '\* = Required Information'. The form has a tabbed header with 'Information' selected. The fields are as follows:

- Inventory Number:** A required field with the placeholder 'Search HandsMen Products...' and a magnifying glass icon.
- \* HandsMen Product:** A required field with the placeholder 'Search HandsMen Products...' and a magnifying glass icon.
- Stock Quantity:** An input field.
- Warehouse:** An input field.

At the bottom right are three buttons: 'Cancel', 'Save & New', and a larger blue 'Save' button.

## 5. Marketing Campaign

The screenshot shows the 'Marketing Campaigns' section of the software. The navigation bar and search bar are identical to the inventory section. The main area displays a single marketing campaign with the number 'MC -0001'. The campaign details include:

- Marketing Campaign Number: MC -0001
- HandsMen Customer: [Mica Anoy](#)
- 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

<b>Marketing Campaign Number</b>	<b>Owner</b>
<input type="text" value="HandsMen Customer"/>	Tristan Matthew Matencio
<b>Start Date</b>	
<input type="text"/>	
<b>End Date</b>	
<input type="button" value="Cancel"/> <input type="button" value="Save &amp; New"/> <input type="button" value="Save"/>	

## User Management

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

Niklaus Mikaelson

User Profile Help for this Page

**User Detail**

Name: Niklaus Mikaelson	Role: <b>Sales</b>
Alias: nmika	User License: <b>Salesforce</b>
Email: <a href="mailto:vince428.oct@gmail.com">vince428.oct@gmail.com</a> [Verify]	Profile: <b>Platform 1</b>
Username: vince428.oct0420@gmail.com	Active: <input checked="" type="checkbox"/>
Nickname: User17640559307481522	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: <b>View</b>
Delegated Approver:	Data.com User Type: <input type="checkbox"/>
Manager:	Accessibility Mode (Classic Only): <input type="checkbox"/>
Receive Approval Request Emails: Only if I am an approver	Debug Mode: <input type="checkbox"/>
Federation ID:	High-Contrast Palette on Charts: <input type="checkbox"/>
App Registration: One-Time Password Authenticator: <input type="checkbox"/>	Load Lightning Pages While Scrolling: <input checked="" type="checkbox"/>
App Registration: Salesforce Authenticator: <input type="checkbox"/>	Salesforce CRM Content User: <input checked="" type="checkbox"/>
Security Key (U2F or WebAuthn): <input type="checkbox"/>	Receive Salesforce CRM Content Email Alerts: <input checked="" type="checkbox"/>
Lightning Login: <input type="checkbox"/>	Receive Salesforce CRM Content Alerts as Daily Digest: <input checked="" type="checkbox"/>
Temporary Verification Code (Expires in 1 to 24 Hours): <input type="checkbox"/>	Make Setup My Default Landing Page: <input type="checkbox"/>
	Allow Forecasting: <input type="checkbox"/>
	No MRU Updates: <input type="checkbox"/>
	Call Center: <input type="checkbox"/>
	Phone: <input type="checkbox"/>

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

Kol Mikaelson

User Profile Help for this Page

**User Detail**

Name: Kol Mikaelson	Role: <b>Inventory</b>
Alias: kmika	User License: <b>Salesforce</b>
Email: <a href="mailto:vince428.oct@gmail.com">vince428.oct@gmail.com</a> [Verify]	Profile: <b>Platform 1</b>
Username: vince428.oct1016@gmail.com	Active: <input type="checkbox"/>
Nickname: User17640560162694184081	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: <b>View</b>
Delegated Approver:	Data.com User Type: <input type="checkbox"/>
Manager:	Accessibility Mode (Classic Only): <input type="checkbox"/>
Receive Approval Request Emails: Only if I am an approver	Debug Mode: <input type="checkbox"/>
Federation ID:	High-Contrast Palette on Charts: <input type="checkbox"/>
App Registration: One-Time Password Authenticator: <input type="checkbox"/>	Load Lightning Pages While Scrolling: <input checked="" type="checkbox"/>
App Registration: Salesforce Authenticator: <input type="checkbox"/>	Salesforce CRM Content User: <input checked="" type="checkbox"/>
Security Key (U2F or WebAuthn): <input type="checkbox"/>	Receive Salesforce CRM Content Email Alerts: <input checked="" type="checkbox"/>
Lightning Login: <input type="checkbox"/>	Receive Salesforce CRM Content Alerts as Daily Digest: <input checked="" type="checkbox"/>
Temporary Verification Code (Expires in 1 to 24 Hours): <input type="checkbox"/>	Make Setup My Default Landing Page: <input type="checkbox"/>
	Allow Forecasting: <input type="checkbox"/>
	No MRU Updates: <input type="checkbox"/>
	Call Center: <input type="checkbox"/>
	Phone: <input type="checkbox"/>

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

## Reports and Dashboard

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

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

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

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 Anoya	Bronze	-
Michael Jordan	Gold	2k

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	a01gL0000WW0fU	-
Muscle Tee	a01gL0000WW0Pew	-
Oversized Shirt	a01gL0000WW0Kv	2k
Shorts	a01gL0000WW0XnO	-
Shorts	a01gL0000WW0bkY	-
T Shirt	a01gL0000WW0snQ	-

As of Nov 27, 2025, 12:36 AM

New HandsMen Orders Report

HandsMen Order: HandsMen OrderN	HandsMen C...	Customer Email	Qu...
O-0001	a02gL00000C	John	vince428.oct@gmail.co
O-0002	a02gL00000C	John	john@example.com
O-0003	a02gL00000C	John	john@example.com
O-0004	a02gL00000C	Austine Jade Bernardo	tristanmatthew20@gmail.com
O-0005	a02gL00000C	Austine Jade Bernardo	tristanmatthew20@gmail.com
O-0006	a02gL00000C	Mica Anoya	vince428.oct@gmail.co

As of Nov 27, 2025, 12:36 AM

Marketing Campaign Reports

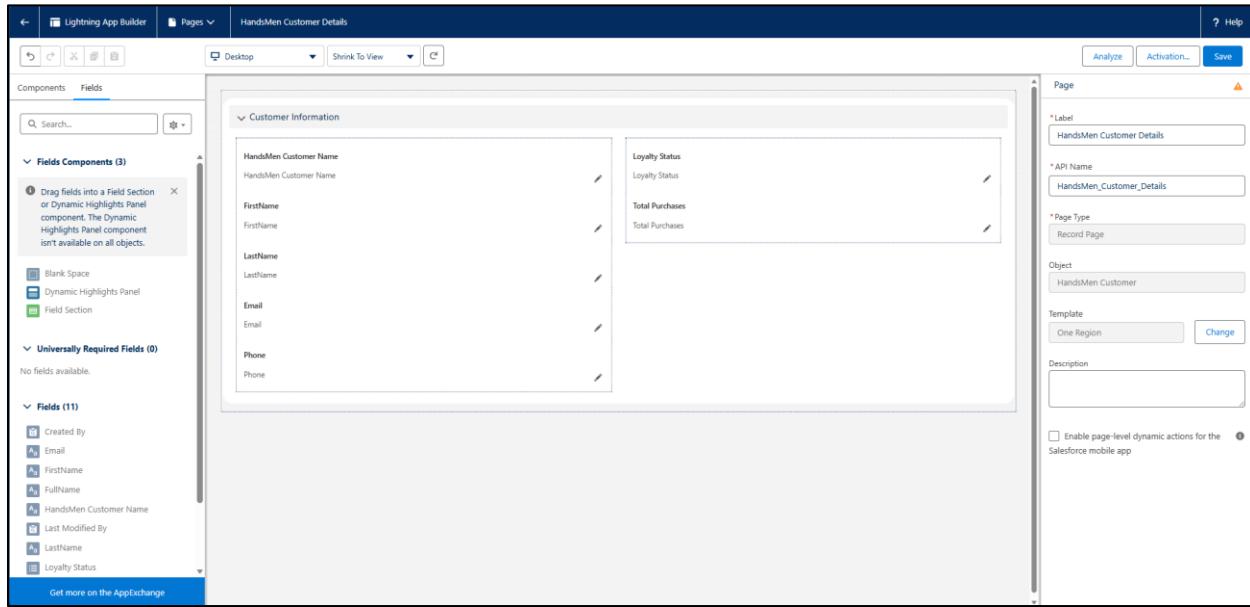
Marketing Campaign: Marketing Campaign ...	HandsMen Customer: HandsMen Cust...	St...	En...
MC -0001	Mica Anoya	11/27	11/30

As of Nov 27, 2025, 12:36 AM

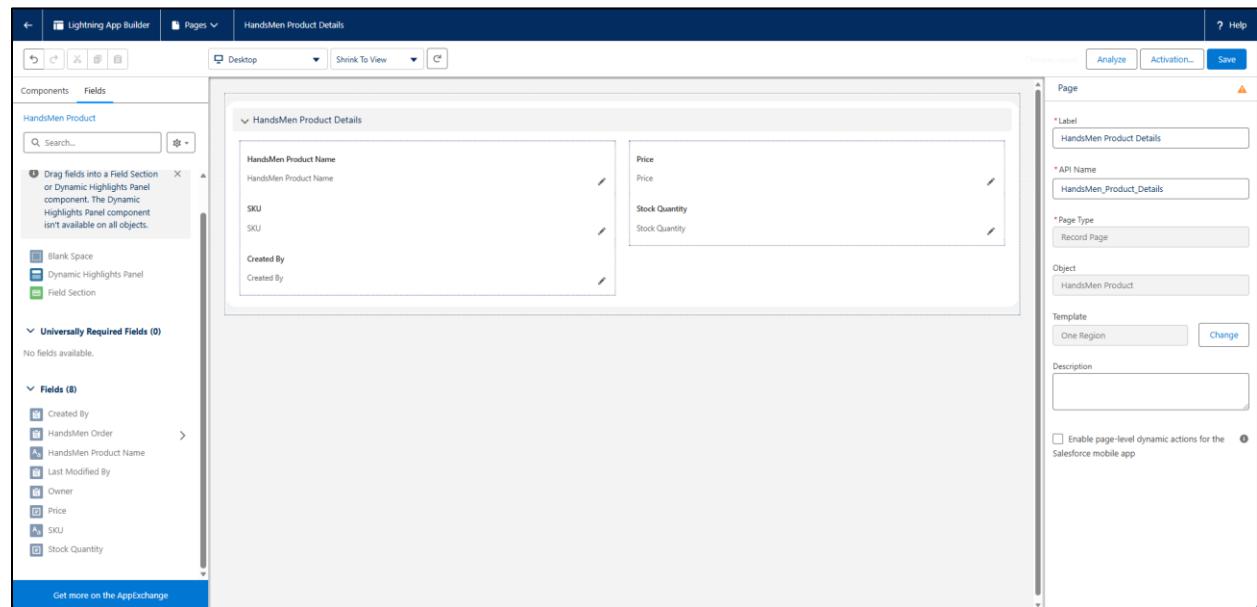
## Lightning Pages

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

The screenshot shows the Lightning App Builder interface for creating a page titled "HandsMen Order Details". The left sidebar lists components and fields for the "HandsMen Order" object. The main area displays a "Customer Order Details" section with fields like HandSMen OrderNumber, HandSMen Customer, Customer Email, and Total Amount. The right sidebar contains the "Page" configuration panel, which includes fields for Label ("HandsMen Order Details"), API Name ("HandsMen\_Order\_Details"), Page Type ("Record Page"), Object ("HandsMen Order"), and Template ("One Region"). A checkbox for "Enable page-level dynamic actions for the Salesforce mobile app" is also present.

### 4. Inventory

The screenshot shows the Lightning App Builder interface for creating a page titled "Inventory Details". The left sidebar lists components and fields for the "Inventory" object. The main area displays a "Section" with fields like Inventory Number, HandSMen Product, and Created By. The right sidebar contains the "Page" configuration panel, which includes fields for Label ("Inventory Details"), API Name ("Inventory\_Details"), Page Type ("Record Page"), Object ("Inventory"), and Template ("One Region"). A checkbox for "Enable page-level dynamic actions for the Salesforce mobile app" is also present.

### 5. Marketing Campaign

The screenshot shows the Lightning App Builder interface for creating a page titled "Marketing Campaign Details". The left sidebar lists components and fields for the "Marketing Campaign" object. The main area displays a "Marketing Campaign Details" section with fields like HandSMen Customer, Created By, Owner, Marketing Campaign Number, Start Date, End Date, and Last Modified By. The right sidebar contains the "Page" configuration panel, which includes fields for Label ("Marketing Campaign Details"), API Name ("Marketing\_Campaign\_Details"), Page Type ("Record Page"), Object ("Marketing Campaign"), and Template ("One Region"). A checkbox for "Enable page-level dynamic actions for the Salesforce mobile app" is also present.

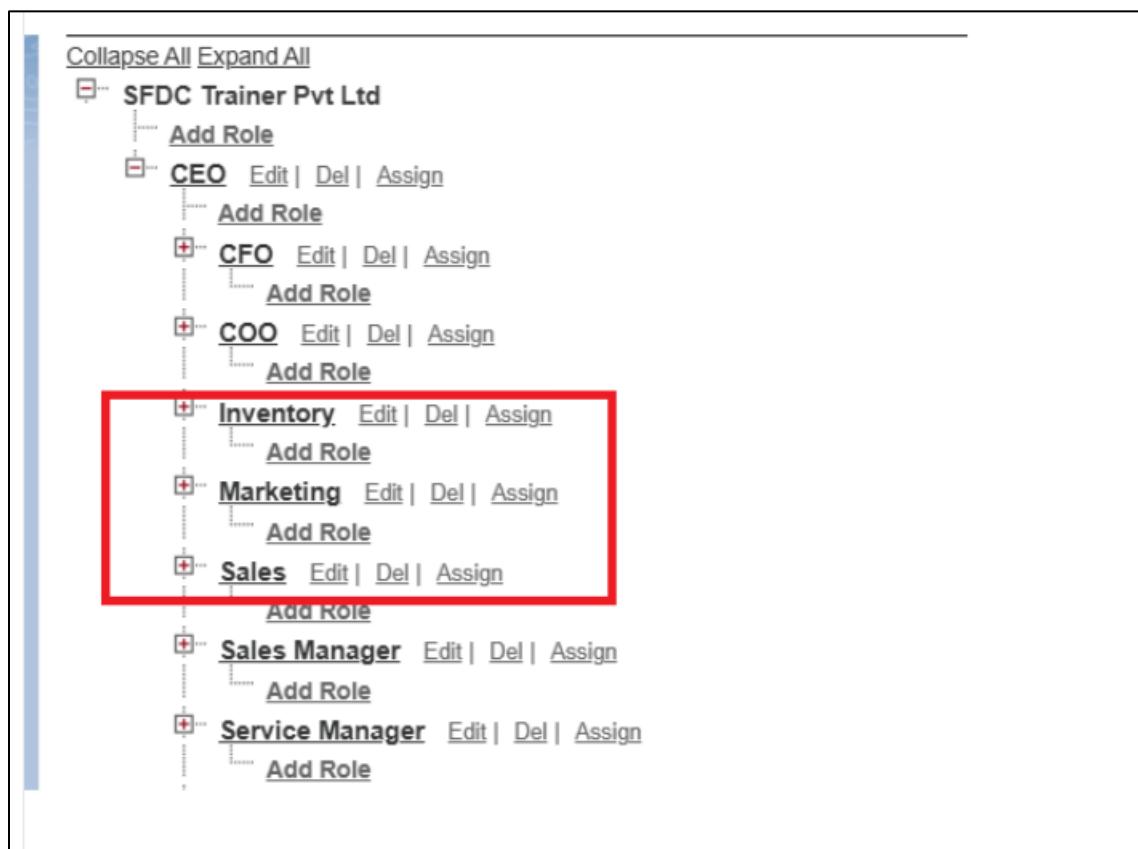
## PHASE 4: DATA MIGRATION, TESTING AND SECURITY

### 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).