

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

1. Executive Summary

This document outlines the scope, objectives, and technical implementation details of the "HandsMen Threads: Elevating the Art of Sophistication in Men's Fashion" Salesforce project. HandsMen Threads, a dynamic organization in the fashion industry, is undertaking this project to revolutionize its data management capabilities and significantly enhance customer relations. The core objective is to establish a robust data model within

Salesforce to centralize all pertinent business data, ensuring seamless information flow and fostering data integrity for informed decision-making and operational excellence. This project will integrate several new business processes to improve customer service, optimize operations, and drive business growth through automation and enhanced data insights.

2. Project Overview

- **Project Title:** HandsMen Threads: Elevating the Art of Sophistication in Men's Fashion
- **Assigned To:** Abhishek Trivedi
- **Project Duration (Module/Segment):** 30 minutes (Indicates a focused learning module or segment of the overall project, given the comprehensive scope outlined.)
- **Current Progress:** 0% (As per the current snapshot, indicating initial setup or planning phase.)
- **Problem Statement:** Inefficient data management and a need to enhance customer relationship processes within the fashion industry context.
- **Solution Vision:** Implementing a comprehensive Salesforce solution that ensures data integrity, automates key business processes, and provides a unified view of customer and business data.

3. Key Business Objectives & Implemented Functionalities

The project focuses on developing and implementing specific functionalities within Salesforce to address critical business needs, leading to improved customer service and operational efficiency. The key processes being addressed include:

1. Automated Order Confirmations:

- a. **Objective:** Enhance customer engagement and strengthen relationships post-purchase.
- b. **Functionality:** Customers will automatically receive email updates upon order confirmation.

- c. **Technical Implementation:** Utilizes Salesforce Email Templates and Flows (e.g., Record-Triggered Flow on Order object).
- 2. Dynamic Loyalty Program:**
 - a. **Objective:** Implement a system for personalized rewards and repeat business based on customer loyalty.
 - b. **Functionality:** Customer loyalty statuses will be dynamically updated based on purchase history.
 - c. **Technical Implementation:** Involves Custom Objects (e.g., HandsMen Customer, HandsMen Order), Custom Fields (e.g., Loyalty Status), and potentially Flows or Apex Triggers to manage status updates.
- 3. Proactive Stock Alerts:**
 - a. **Objective:** Ensure timely restocking, prevent stockouts, and optimize warehouse management.
 - b. **Functionality:** Automatic email notifications will be sent to the warehouse team when stock levels drop below a predefined threshold (e.g., five units).
 - c. **Technical Implementation:** Requires a Custom Object (Inventory), Custom Fields for stock levels, Record-Triggered Flows, and Email Alerts.
- 4. Scheduled Bulk Order Updates:**
 - a. **Objective:** Maintain accurate stock levels and financial records through automated daily processing.
 - b. **Functionality:** A daily midnight system process to handle bulk order updates, adjusting inventory and financial records.
 - c. **Technical Implementation:** Leverages Asynchronous Apex, specifically Batch Apex, to process large volumes of data efficiently.

4. Project Phases & Deliverables

The project is structured into four distinct phases to ensure a systematic and successful implementation:

- **Phase 1: Architecture & Planning**
 - **Activities:**
 - Defining Custom Objects, Fields, Relationships (e.g., Lookup Relationships, Master-Detail Relationships), and Formula Fields.
 - Establishing Validation Rules for data quality and integrity.
 - Designing Flows, Apex Triggers, and Batch Jobs outlines.

- Designing Email Templates for various notifications and customer communications.
 - **Deliverables:** Data Model Design, Automation Design Document, Email Template Mockups.
- **Phase 2: Development**
 - **Activities:**
 - Creation of Custom Objects and Fields within Salesforce.
 - Implementation of automation using Flows and Apex Triggers.
 - Setup of Data Security (Profiles, Roles, Permission Sets) and Sharing Rules.
 - Development of Batch Jobs for scheduled processing.
 - Configuration of Email Templates and Email Alerts.
 - **Deliverables:** Developed Custom Objects and Fields, Implemented Flows and Apex, Configured Security Settings, Developed Batch Apex classes, Configured Email Templates.
- **Phase 3: Testing & Quality Assurance (QA)**
 - **Activities:**
 - Conducting Unit Testing for individual components (objects, automation).
 - Performing End-to-End Testing with sample data to validate business processes.
 - Executing Performance Testing to ensure system responsiveness.
 - Conducting Security Checks to verify data access and permissions.
 - **Deliverables:** Test Plans, Test Cases, Test Results, Bug Reports.
- **Phase 4: Deployment & Training**
 - **Activities:**
 - Deployment of the Salesforce solution to the production environment.
 - Training end-users on the new functionalities and processes.
 - Providing post-go-live support and ongoing monitoring.
 - **Deliverables:** Deployed Salesforce Solution, User Training Materials, Support Plan.

5. Technical Implementation Details

This section details the Salesforce components and functionalities built or customized as part of this project.

5.1. Data Management

- **Custom Objects:**
 - HandsMen Customer
 - HandsMen Order
 - HandsMen Product
 - Inventory
 - Marketing Campaign
- **Custom Tabs:**
 - Tabs will be created for each custom object, including Tab - HandsMen Customer.
- **Custom Fields:**
 - Essential fields such as Email, Phone, and Loyalty Status will be created.
 - Various Lookup Relationships and Formula Fields will be established to connect objects and derive data.
 - Remaining necessary fields for all custom objects will be defined and implemented.
- **App Manager:** A custom Salesforce Lightning App will be configured to provide a tailored user experience for HandsMen Threads.
- **Data Configuration:** This phase will involve configuring various Salesforce settings and data related to the project.
- **Validation Rules:** Remaining validation rules will be created to ensure data accuracy and compliance with business logic.

5.2. Data Security

- **Profiles:** A custom Profile - Sales will be configured, and other profiles will be created/modified as needed to control user access.
- **Roles:** A Role - Sales will be established, and additional roles will be created to define data visibility hierarchy.
- **Users:** Specific users like User - Niklaus and User - Kol will be created, along with other required users, and assigned appropriate profiles and roles.

- **Permission Sets:** A custom Permission set - Permission_Platform_1 will be created to grant specific permissions without modifying profiles directly, ensuring granular access control.

5.3. Automation & Customization

- **Email Templates:**
 - Create an Order Confirmation Email Template
 - Create Remaining Email Templates for various business communications.
 - Create an Email Alert for notifications (e.g., stock alerts).
- **Flows:**
 - Create Order Confirmation Email (likely a Record-Triggered Flow).
 - Create Stock Alert Email (Record-Triggered) (a Record-Triggered Flow).
 - Create a Scheduled Flow for time-based automation (e.g., loyalty program updates or daily data processing).
- **Automation using Apex:**
 - Create Apex Class for complex business logic.
 - Create Batch Apex for processing large data volumes (e.g., Scheduled Bulk Order Updates).
- **Batch Jobs:** Implementation of batch jobs for scheduled data processing and updates.

6. Skills Acquired/Demonstrated

This project provides a practical application and demonstration of proficiency in the following Salesforce skills:

- Data Modelling
- Data Quality Management
- Lightning App Builder
- Record-Triggered Flows
- Apex and Apex Triggers
- Asynchronous Apex
- Salesforce Development Best Practices
- Salesforce Apex Development
- Salesforce Lightning Experience Customization

7. Project Statistics

- **Total Epics:** 16
- **Total Stories:** 35
- **Total Subtasks:** 0

(Note: These statistics reflect the breakdown of work items, demonstrating the structured approach to project management.)

8. System Requirements

To ensure optimal performance and compatibility for the Salesforce environment, the following system requirements are recommended:

8.1. Supported Browsers:

- Google Chrome (Latest stable version, recommended)
- Mozilla Firefox (Latest stable version, recommended)
- Microsoft Edge (Latest stable version)
- Safari (Latest stable version, Mac only)
- Internet Explorer 11 (Limited support, not recommended)
 - *Note: It is recommended to have at least two supported browsers installed on the system.*

8.2. Operating System Compatibility:

- Windows 8 / 9 / 10 / 11
- macOS (Latest versions)
- Linux (Limited support, browser-dependent)
- ChromeOS (Browser-based usage)

8.3. Hardware Requirements:

- **Processor:** Intel Core i3 or higher (or equivalent)

- **RAM:** Minimum 4GB RAM (8GB or more recommended for better performance)
- **Storage:** At least 10GB free disk space
- **Display Resolution:** Minimum 1366 x 768 (1920 x 1080 recommended)

8.4. Network Requirements:

- **Internet Connection:** Stable broadband internet connection (minimum 30 Mbps recommended)
- **VPN Restrictions:** No VPN restrictions that block Salesforce access.
- **Firewall Settings:** Allow Salesforce domains in firewall settings (e.g., salesforce.com, force.com).

9. Next Steps / Action Items

- **Demo Link:** Provide a link to the live demo environment of the project.
- **GitHub Link:** Provide a link to the GitHub repository containing the project code and configurations for mentor review.
- **Salesforce Developer Org:** Creation of a Personal Salesforce Developer Edition Organization for project development and testing.