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

A Salesforce Project Documentation

by Christian James D. Torrillo

Project Overview

HandsMen Threads is implementing a Salesforce-based Customer Relationship Management (CRM) solution designed to optimize business operations and enhance customer relationships. The project aims to create a centralized data model to efficiently manage critical business information and streamline various workflows. Key features of the CRM include automated order confirmations to improve customer engagement, a dynamic loyalty program to reward repeat customers, proactive stock alerts to prevent stockouts, and scheduled bulk order updates to ensure accurate financial and inventory tracking. This CRM will act as the backbone of the organization's customer service and operations, allowing for real-time updates and seamless communication across all departments.

Objectives

- **To improve data accuracy and consistency**
  Build a robust data model to maintain data integrity across customer records, orders, and inventory. This reduces errors and ensures decision-makers can rely on accurate data for smarter business decisions, ultimately improving operational efficiency and business forecasting.

- **To automate routine processes**
  Automate tasks like order confirmations, loyalty status updates, and stock level alerts. This saves time, reduces manual effort, and ensures customers receive timely, consistent communication—leading to improved customer engagement and loyalty, and enhancing overall customer experience.

- **To enhance personalization**
  Update customer loyalty statuses based on their purchase history to offer personalized rewards. This fosters stronger relationships, encourages repeat business, and boosts customer retention, directly increasing lifetime value and revenue.

- **To effectively manage inventory**
  Set up automated alerts for low stock levels, ensuring timely restocking and preventing stockouts. This improves product availability, avoids missed sales,

and enhances customer satisfaction by ensuring that products are consistently in stock when needed.

- **To streamline financial and inventory updates**
  Automate bulk order updates and daily inventory adjustments. This ensures accurate financial records and real-time inventory levels, reducing manual errors, improving operational flow, and supporting better resource planning and cash flow management.

Phase 1: Requirement Analysis & Planning

1.1. Business Requirements

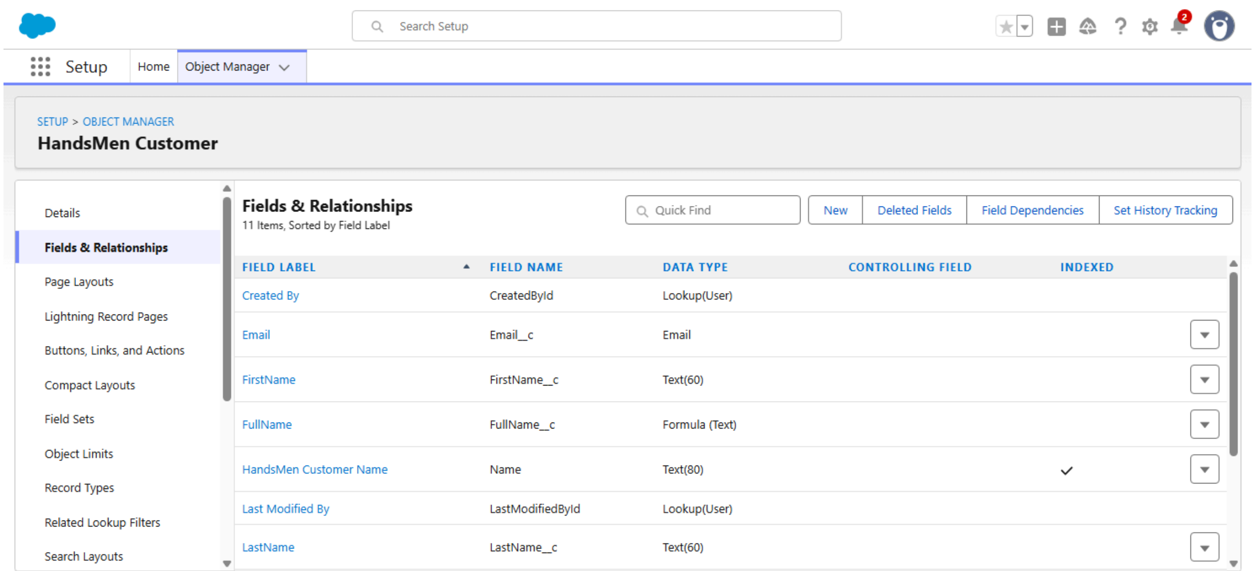
- **Customer Relationship Management**: The business needs a CRM solution that centralizes customer data (e.g., accounts, contacts, orders) to improve customer engagement, streamline sales, and enhance service delivery.
- **Order Management**: A seamless process for capturing and tracking customer orders, from order creation to payment and shipment. This includes automated features like order confirmations and stock alerts to minimize errors and ensure timely fulfillment.
- **Inventory Management**: Real-time visibility into inventory levels and automatic stock alerts for proactive restocking, reducing the risk of stockouts and overstocking.

1.2. Project Scope

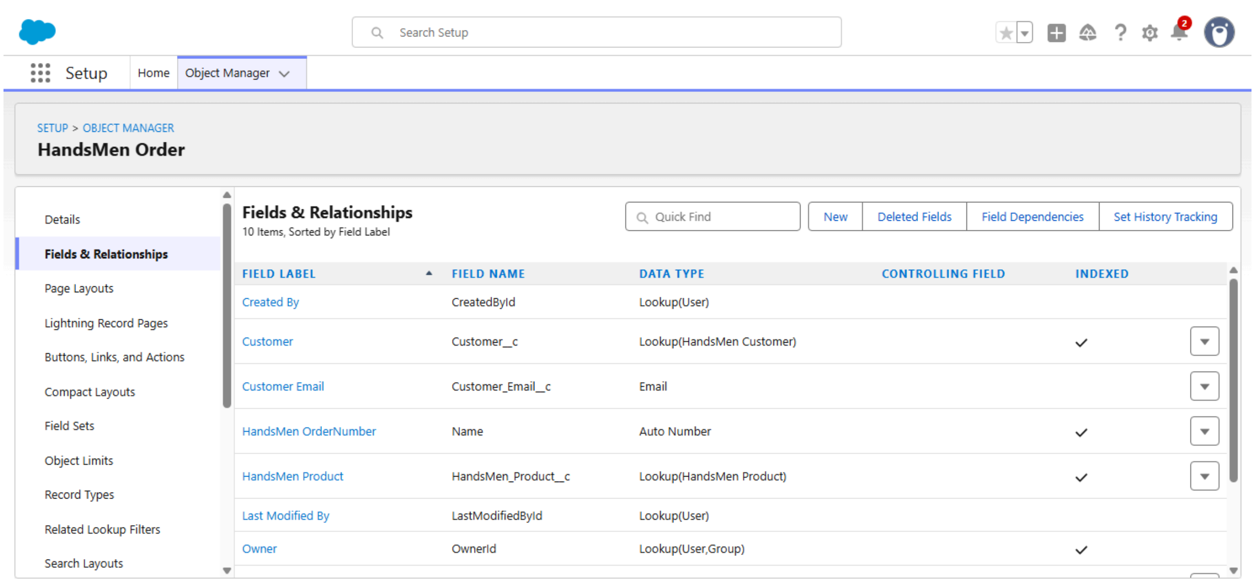
- Centralized management of Customer Data (Account, Contact, and Opportunity records).
- Order Management system integrated with Inventory Management.
- Loyalty Program to track and reward customer behavior.
- Automated processes such as Order Confirmations, Stock Alerts, and Bulk Order Updates.

1.3. Design Data Model

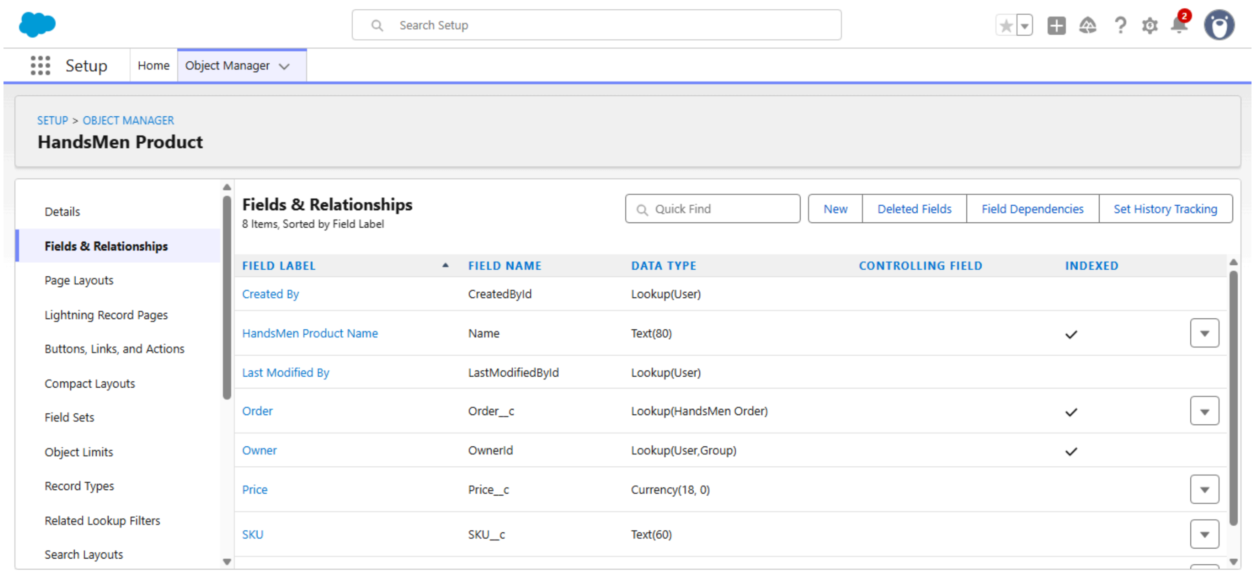
- **HandsMen Customers**
  Stores detailed information about individual customers or client accounts, including personal contact details, purchase history, and loyalty status. This object helps manage and track customer relationships.



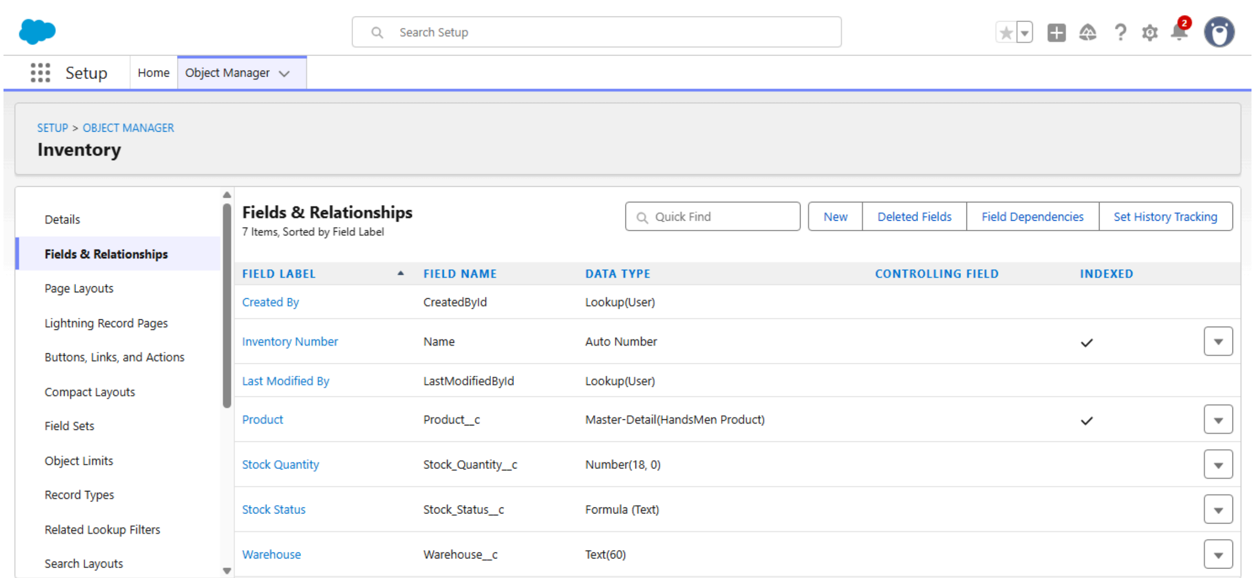
- **HandsMen Orders**
  Tracks customer orders from creation to fulfillment. It includes details like order items, quantities, order status, and the product ordered.



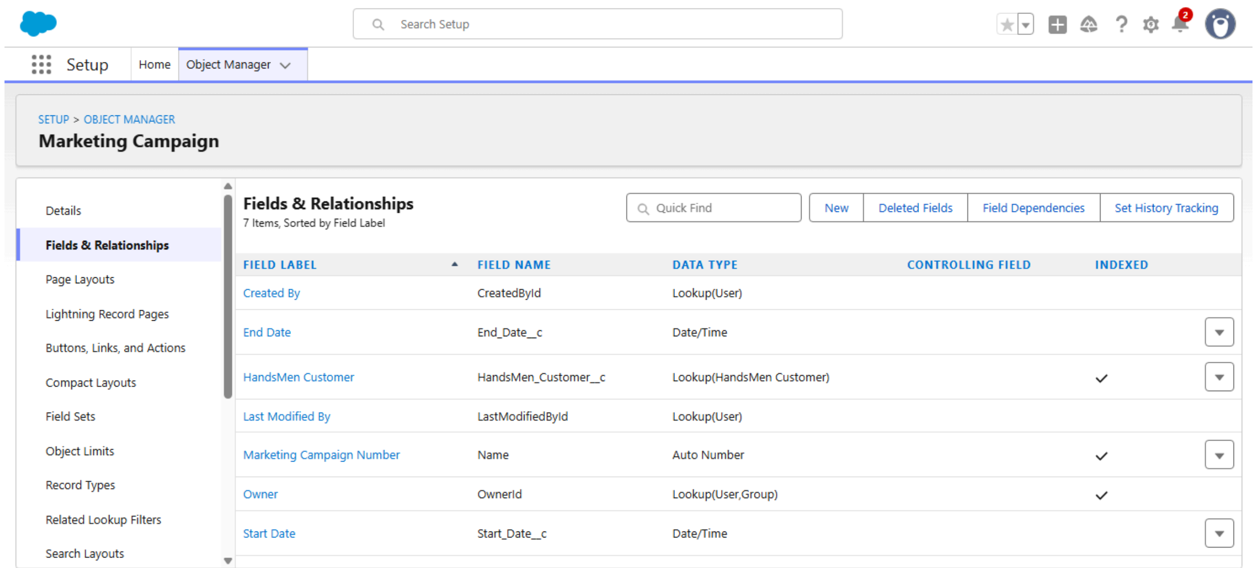
- **HandsMen Products**
  Maintains a catalog of products offered by HandsMen Threads, including product details such as name, description, pricing, and SKU. This object is linked to both the Orders and Inventories objects to track product availability and sales.



- **Inventories**
  Manages the stock levels of products, including data on stock quantities and warehouses. This object helps ensure real-time visibility into inventory status and triggers automatic stock alerts when levels are low.

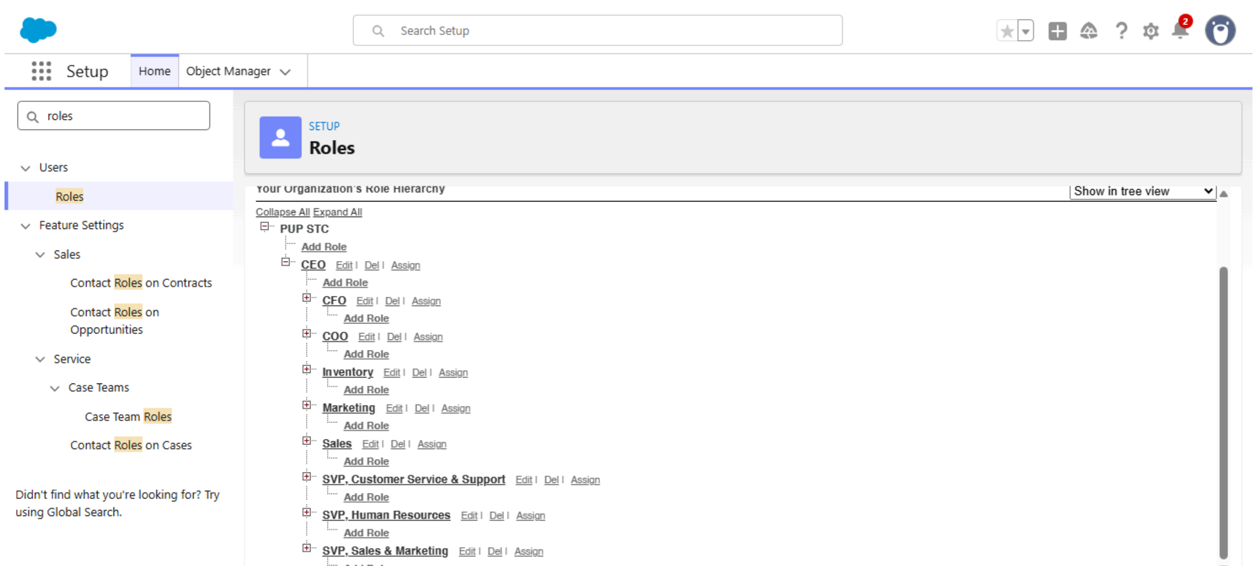


- **Marketing Campaign**
  Tracks and manages marketing initiatives, including details about campaign goals, target audience, budget, channels, and performance metrics.

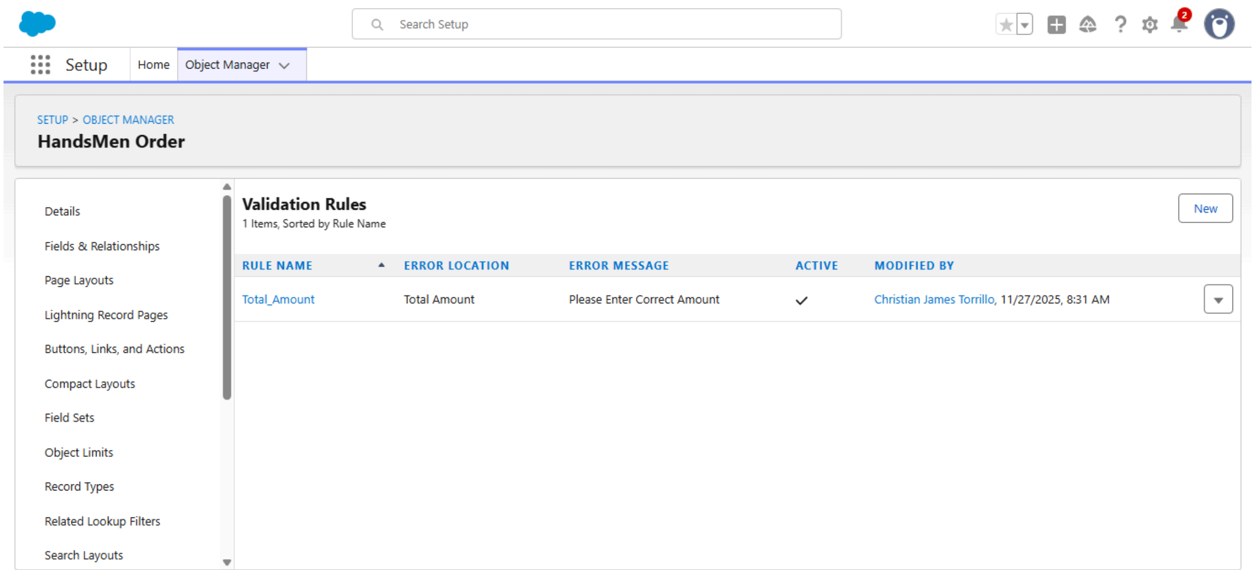


1.4. Security Model

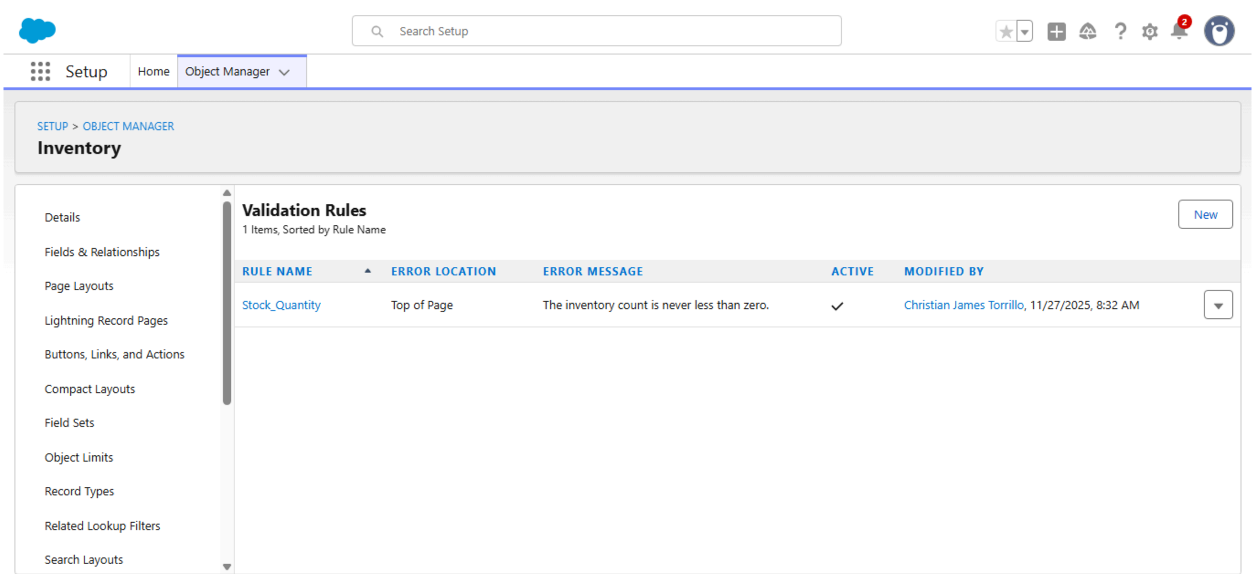
- **Profiles and Roles**
  Define profiles based on user roles (e.g., Sales Rep, Customer Service, Warehouse Manager) to control access to specific records and objects. Set permissions for each profile, determining whether users can view, create, edit, or delete records.



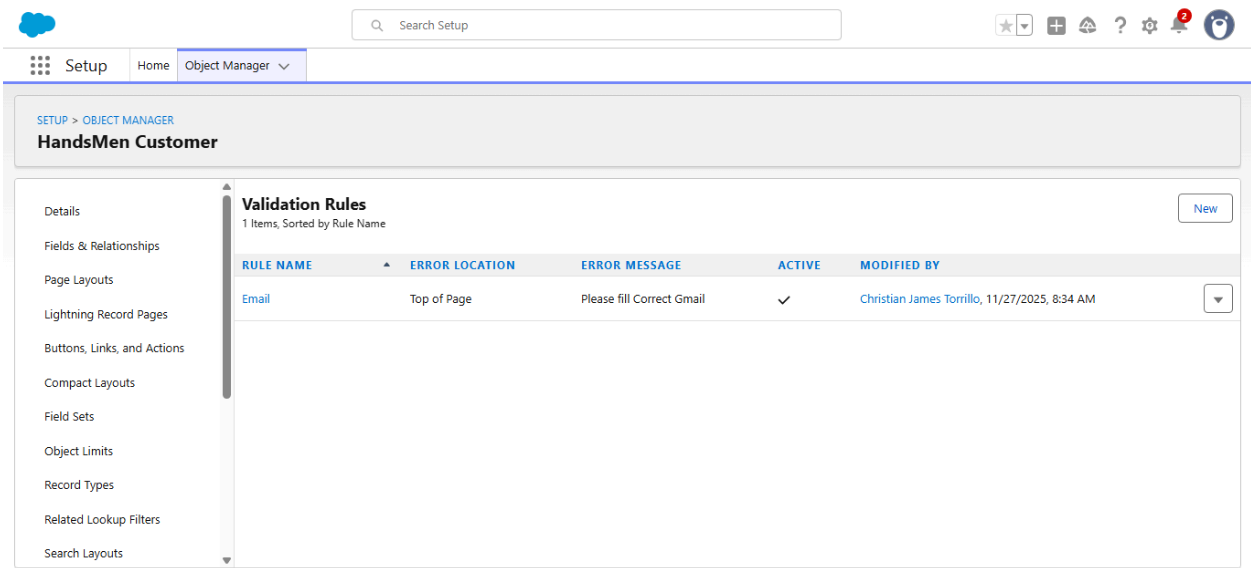
- **Validation Rules**
  Validation rules are used to ensure that the data entered into Salesforce meets specific criteria before it is saved.



This rule ensures that the Total Amount for an Order cannot be less than or equal to zero.



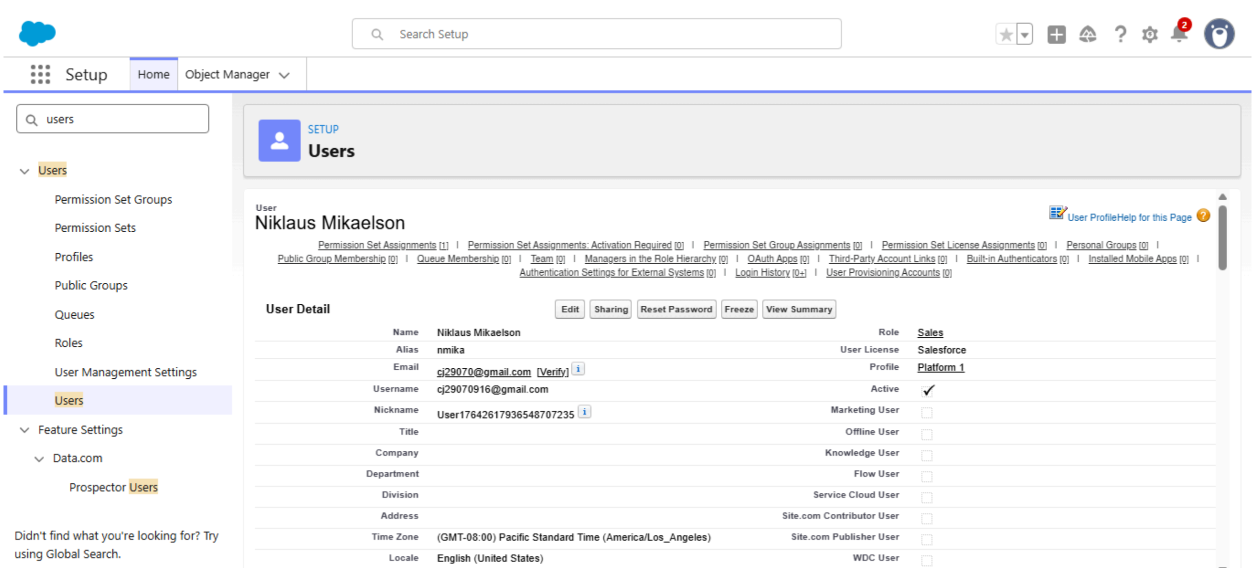
This rule prevents the Stock Quantity of an inventory record from being zero or negative. It ensures that the stock level is always greater than zero, thus avoiding situations where products are incorrectly marked as available when they are out of stock.



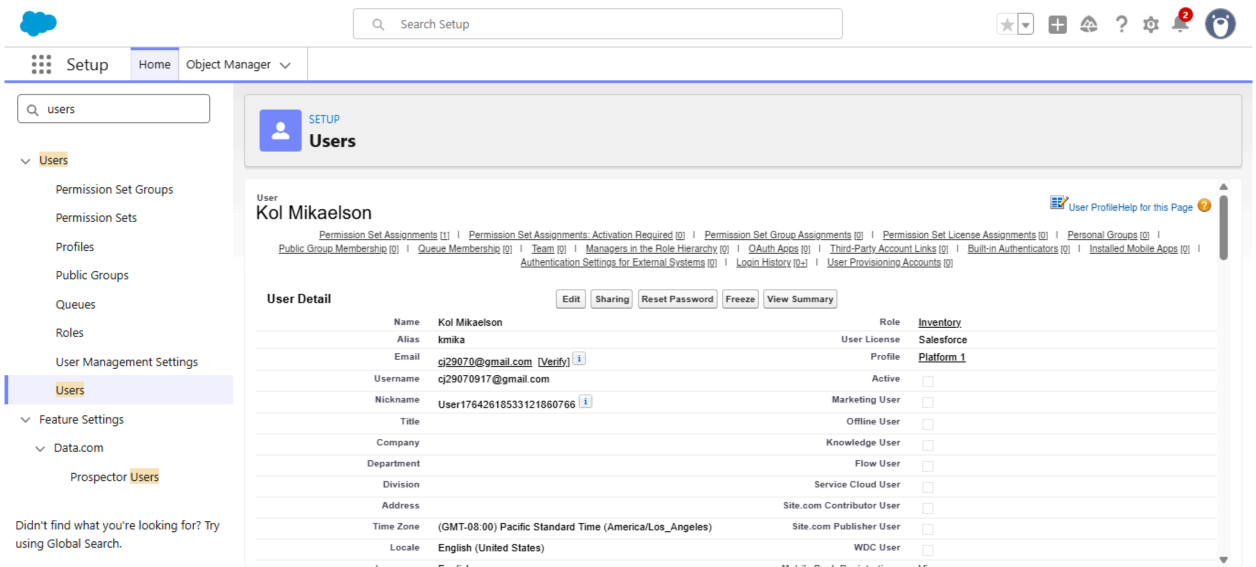
This rule ensures that the email address entered must be valid.

1.5. Stakeholders Mapping

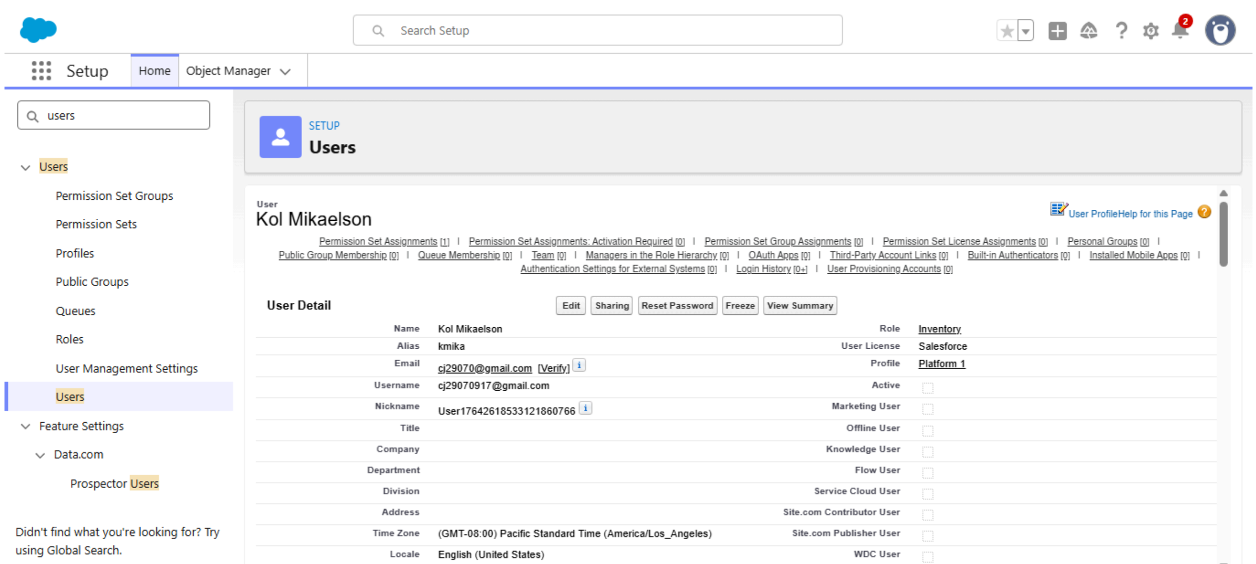
- **Sales Team**
  Manages customer relationships and sales opportunities. They rely on CRM data to track leads, manage orders, and close deals with customers.



- **Inventory Team**
  Oversees product stock levels and ensures accurate inventory management. They use the CRM to monitor product availability and manage stock alerts for timely restocking.



- **Marketing Team**
  Focuses on customer engagement and campaign management. They use CRM insights to segment customers, create targeted marketing campaigns, and drive sales growth.



1.6. Execution RoadMap

Phase 1: Architecture & Planning

- Define objects, fields, relationships, formula fields.
- Establish validation rules, flows, Apex triggers, batch jobs.
- Design email templates for notifications and customer communication.

Phase 2: Development

- Object and field creation.
- Implement automation (flows, process builders, Apex triggers).
- Set up data security and sharing rules.
- Develop batch jobs for scheduled processing.
- Configure email templates and notifications.

Phase 3: Testing & QA

- Unit testing of objects and automation.
- End-to-end testing with sample data.
- Performance testing and security checks.

Phase 4: Deployment & Training

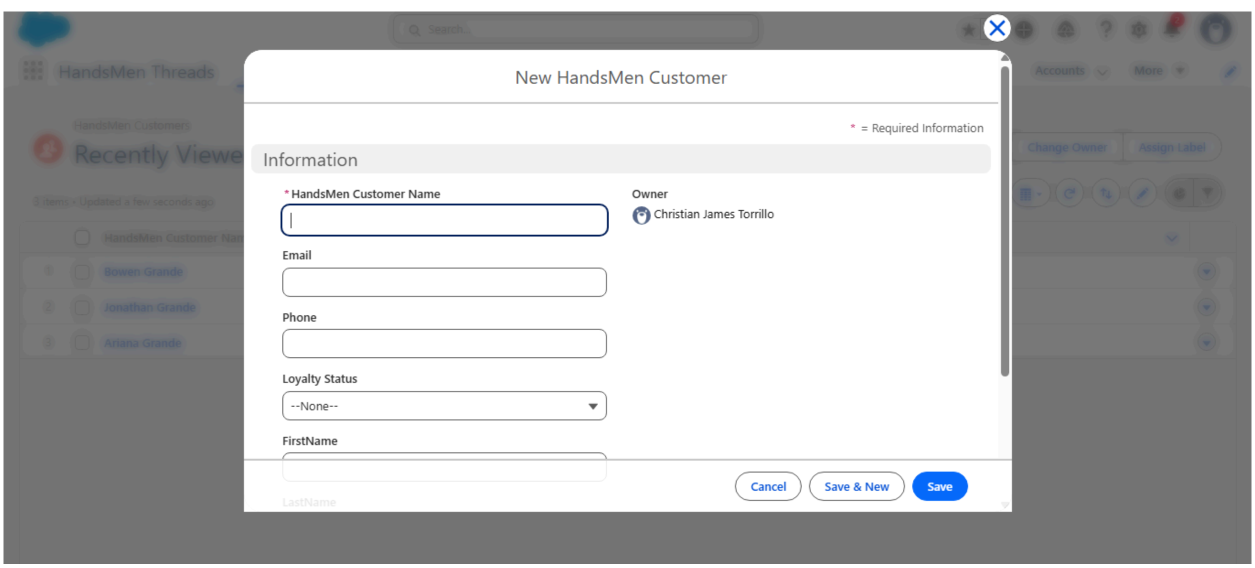
- Deploy to production.
- Train users on new functionality.
- Post-go-live support and monitoring

Phase 2: Salesforce Development - Backend & Configurations

2.1. Customization of Objects, Fields, Validation Rules, Automation (Workflow Rules, Process Builder, Flows, Approval Process)

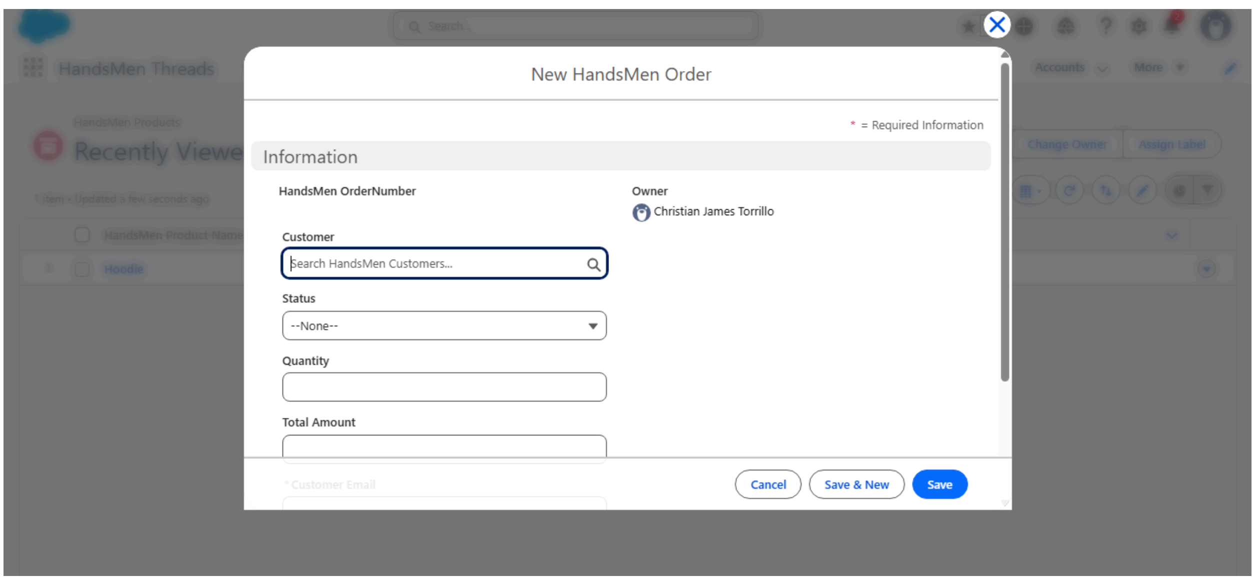
1. **HandsMen Customer__c**

- **Type**: Custom Object
- **Description**: Stores detailed information about individual customers, including their contact information, loyalty status, and purchase history.
- **Key Fields**:
    - **Name** (Record Name): Customer's name (Text).
    - **Email** (Email): Customer's email address.
    - **Phone** (Phone): Customer's phone number.
    - **Loyalty_Status__c** (Picklist: Bronze, Gold, Silver): Loyalty status of the customer (predefined picklist values).
    - **Total_Purchases__c** (Number): Total value of purchases made by the customer.



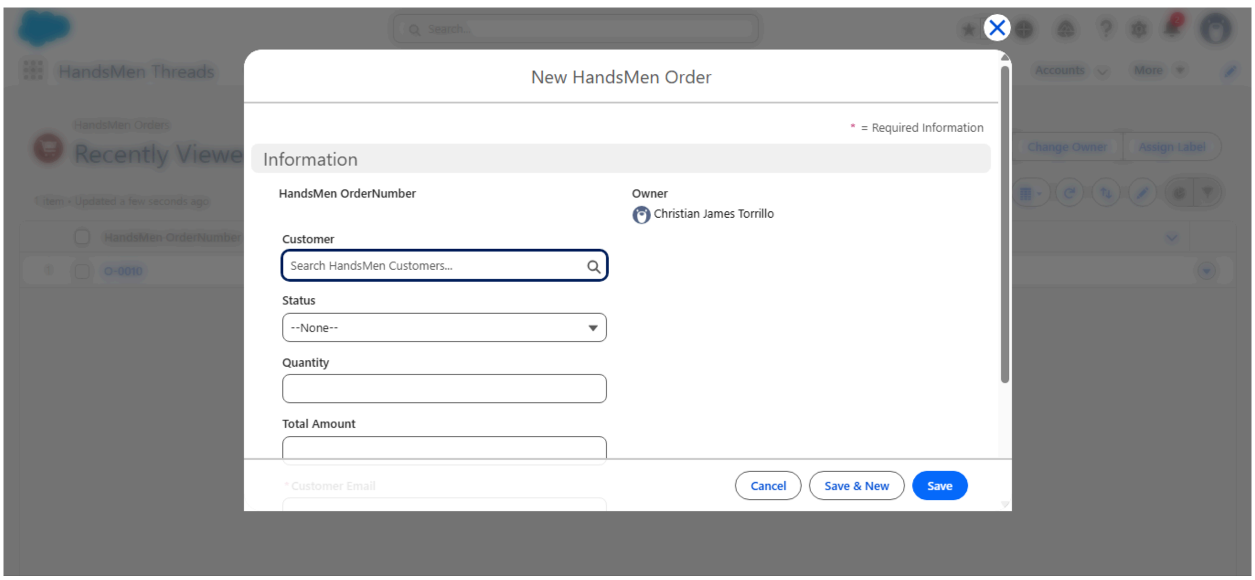
2. **HandsMen Product__c**

- **Type**: Custom Object
- **Description**: Stores information about the products in the HandsMen Threads catalog, including pricing and stock quantities.
- **Key Fields**:
  - **Name** (Record Name): Product name (Text).
  - **SKU** (Text): Unique stock-keeping unit identifier for the product.
  - **Price** (Currency): Price of the product.
  - **Stock_Quantity__c** (Number): Quantity of the product available in inventory.



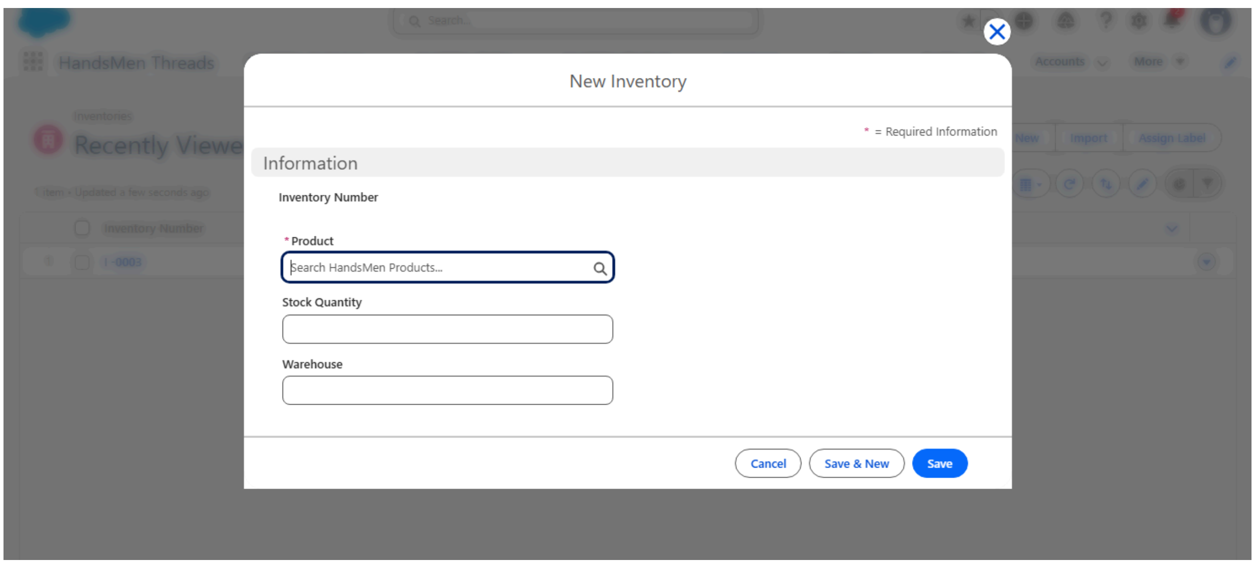
3. **HandsMen Order__c**

- **Type**: Custom Object
- **Description**: Tracks customer orders, including the order number, status, quantities, and total amount.
- **Key Fields**:
  - **Order_Number** (Record Name): Unique identifier for each order (Text).
  - **Status** (Picklist: Pending, Confirmed, Rejection): The current status of the order.
  - **Quantity__c** (Number): Quantity of items in the order.
  - **Total_Amount__c** (Number): Total amount of the order (in currency).



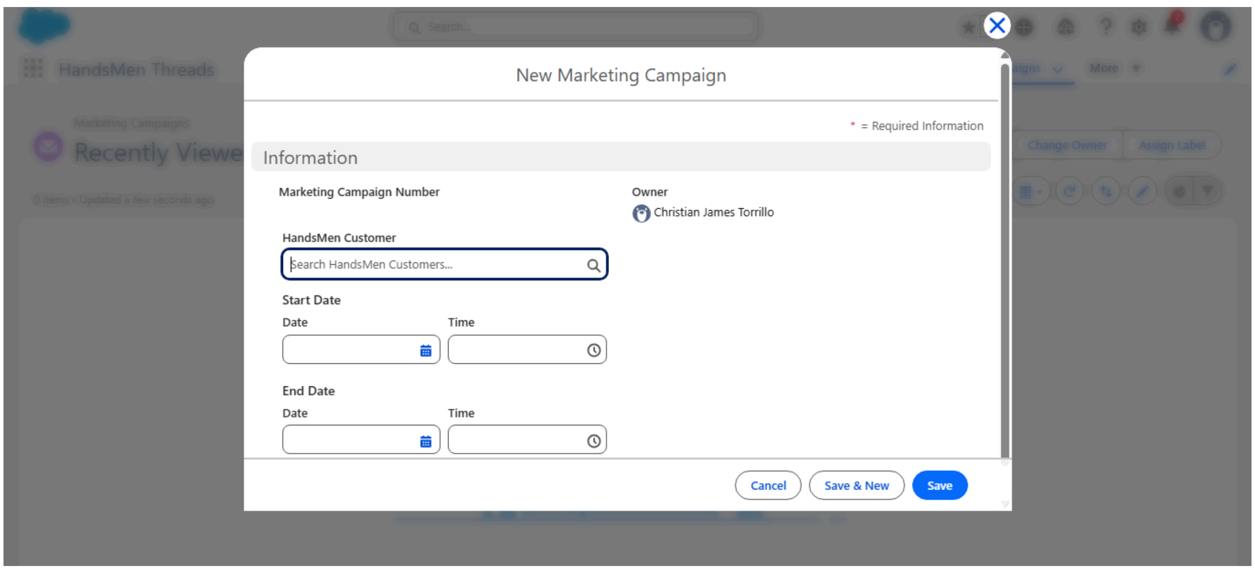
4. **Inventory__c**

- **Type**: Custom Object
- **Description**: Tracks inventory levels for products in the warehouse, including stock quantities and warehouse locations.
- **Key Fields**:
    - **Auto Number** (Record Name): Unique auto-generated record ID for each inventory entry.
    - **Warehouse** (Text): The location or name of the warehouse where the stock is stored.
    - **Stock_Quantity__c** (Number): Quantity of the product available in the specified warehouse.



5. **Marketing Campaign__c**

- **Type**: Custom Object
- **Description**: Manages and tracks marketing campaigns and promotions, including start and end dates, as well as campaign details.
- **Key Fields**:
    - **Campaign_Name** (Record Name): Name of the marketing campaign (Text).
    - **Start_Date** (Date): Start date of the marketing campaign.
    - **End_Date** (Date): End date of the marketing campaign.



2.2. Apex Classes, Triggers, Asynchronous Apex Classes

1. Update Order Total

- Automatically updates the **Total_Amount__c** field on the order based on the price of the product and quantity of the order.

```
trigger LoyaltyStatusTrigger on HandsMen_Customer__c (after insert, after update) {

    List<HandsMen_Customer__c> customersToUpdate = new List<HandsMen_Customer__c>();

    for (HandsMen_Customer__c cust : Trigger.new) {
        HandsMen_Customer__c oldRecord = Trigger.isUpdate ? Trigger.oldMap.get(cust.Id) : null;

        if (Trigger.isInsert ||
           (Trigger.isUpdate && cust.Total_Purchases__c != oldRecord.Total_Purchases__c)) {

            HandsMen_Customer__c updatedCust = new HandsMen_Customer__c(Id = cust.Id);

            if (cust.Total_Purchases__c > 1000) {
                updatedCust.Loyalty_Status__c = 'Gold';
            }
            else if (cust.Total_Purchases__c < 500) {
                updatedCust.Loyalty_Status__c = 'Bronze';
            }
            else {
                updatedCust.Loyalty_Status__c = 'Silver';
            }

            customersToUpdate.add(updatedCust);
```

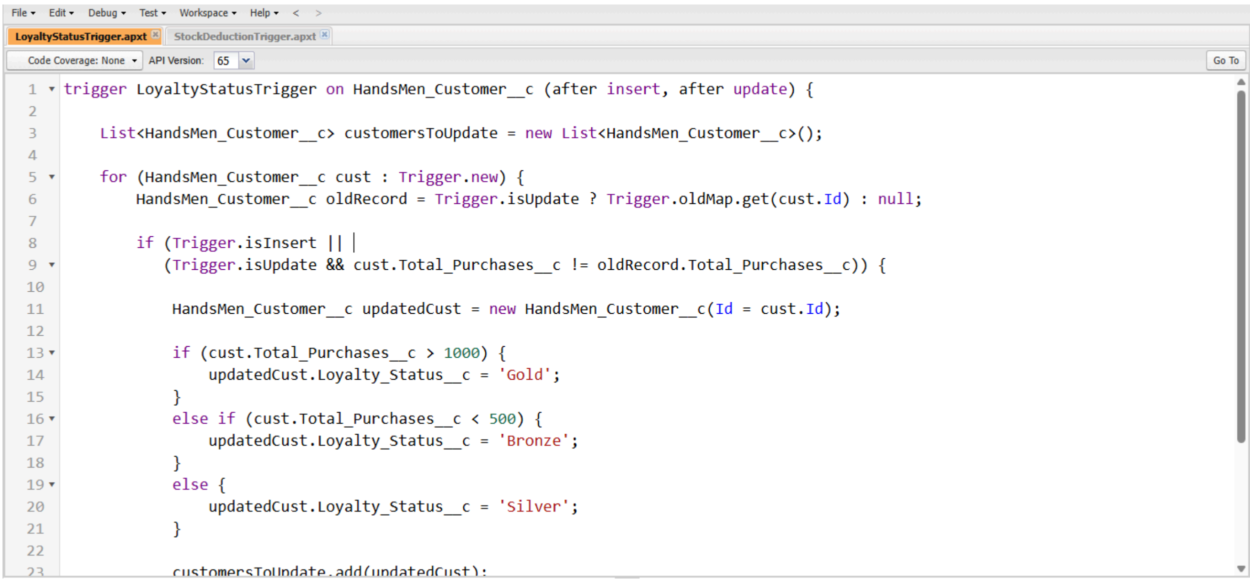
2. Stock Deduction

- Reduces the available stock quantity in the **Inventory__c** object whenever an order is placed and confirmed, ensuring accurate inventory tracking.

```
trigger StockDeductionTrigger on HandsMen_Order__c (after insert, after update) {
    Set<Id> productIds = new Set<Id>();

    for (HandsMen_Order__c order : Trigger.new) {
        if (order.Status__c == 'Confirmed' && order.HandsMen_Product__c != null) {
            productIds.add(order.HandsMen_Product__c);
        }
    }

    if (productIds.isEmpty()) return;

    // Query related inventories based on product
    Map<Id, Inventory__c> inventoryMap = new Map<Id, Inventory__c>(
        [SELECT Id, Stock_Quantity__c, Product__c
         FROM Inventory__c
         WHERE Product__c IN :productIds]
    );

    List<Inventory__c> inventoriesToUpdate = new List<Inventory__c>();

    for (HandsMen_Order__c order : Trigger.new) {
        if (order.Status__c == 'Confirmed' && order.HandsMen_Product__c != null) {
            for (Inventory__c inv : inventoryMap.values()) {
```

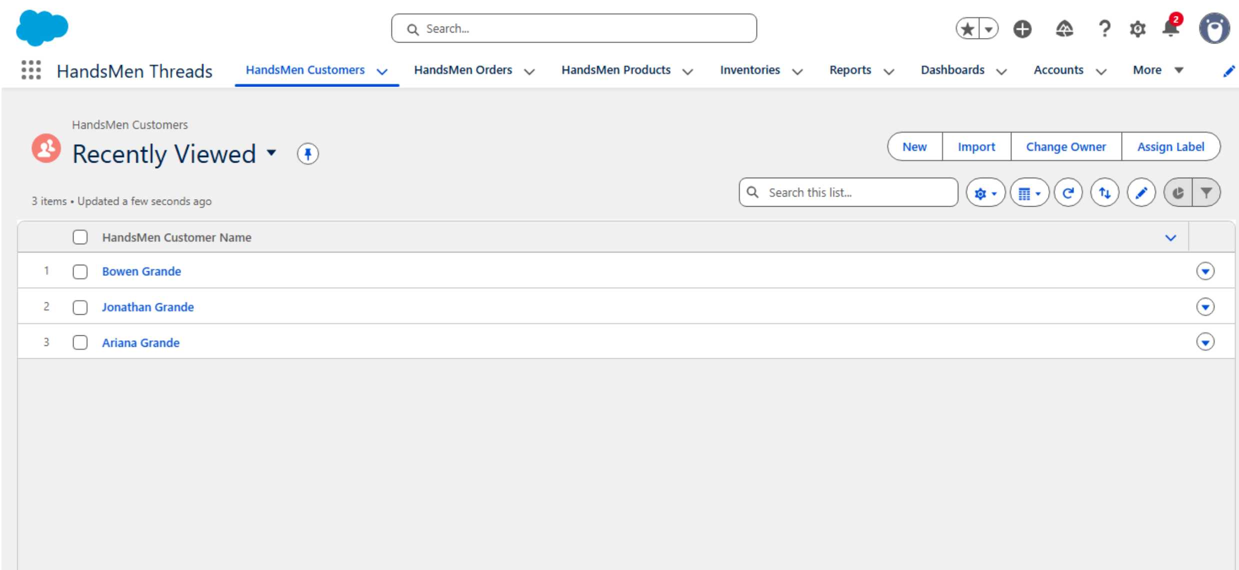
3. Loyalty Status Update

- Automatically upgrades a customer's **Loyalty_Status__c** based on the all-time value of their purchases.

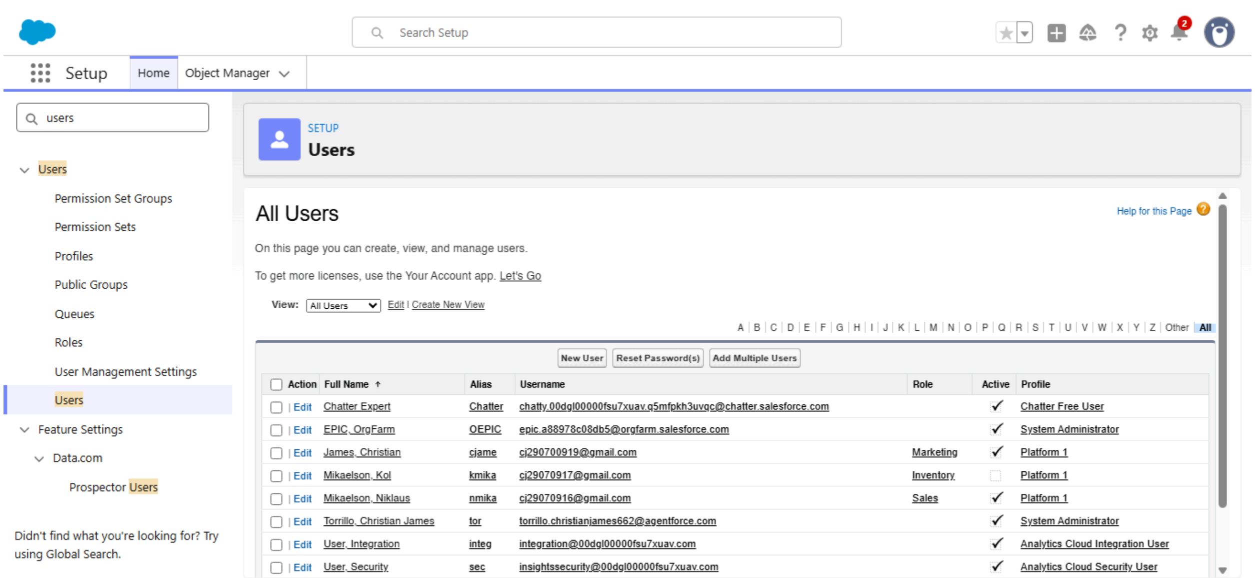


Phase 3: UI/UX Development & Customization

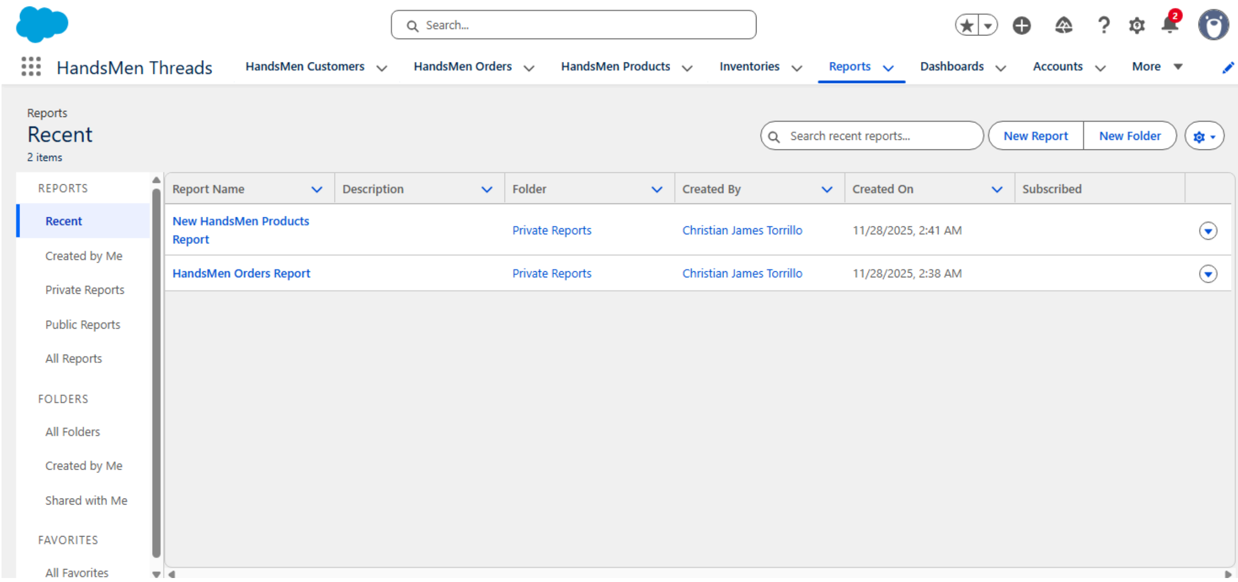
3.1. Lightning App setup through App Manager

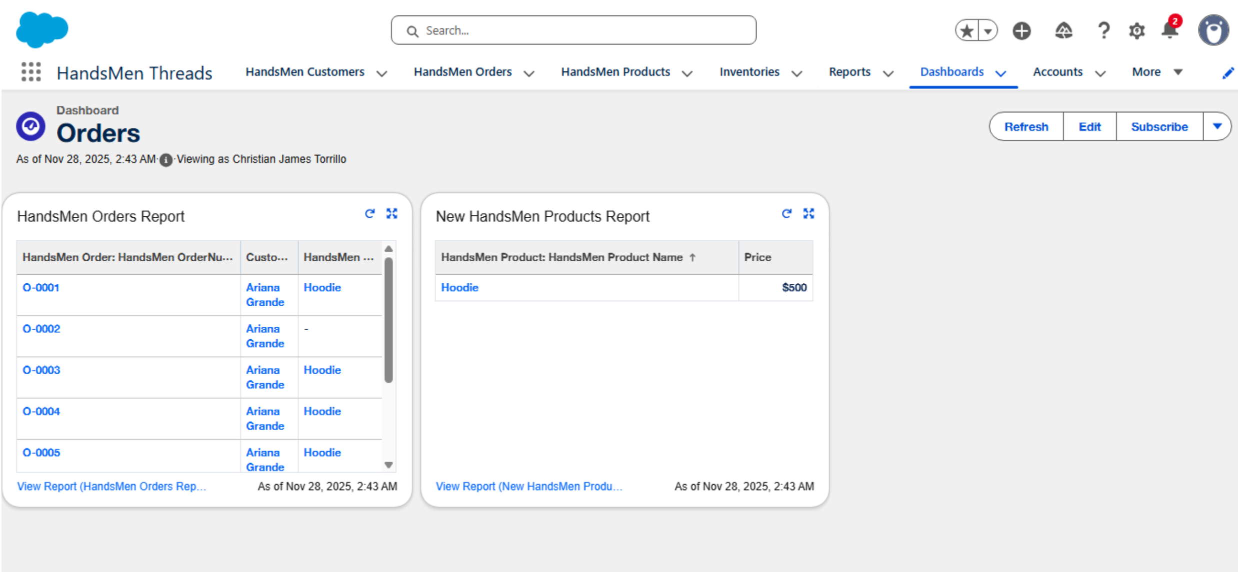


3.2. User Management



3.3. Reports and Dashboards





Phase 4: Data Migration, Testing & Security

4.1. Data Loading Process (Data Import Wizard, Data Loader)

The data loading process for HandsMen Threads will involve tools like the Data Import Wizard and Data Loader to efficiently migrate data into Salesforce.

- Data Import Wizard: It's a user-friendly, browser-based tool available directly in Salesforce and is useful for importing common objects like Accounts, Contacts, Leads, and Opportunities. It provides step-by-step guidance and supports CSV file uploads.

- Data Loader: It's a client application that supports both insert, update, upsert, and delete operations on Salesforce data. It can handle bulk data processing and is suitable for automated data import/export tasks.

4.2. Field History Tracking, Duplicate Rules, Matching Rules should be documented

To ensure data integrity and consistency within Salesforce, Field History Tracking, Duplicate Rules, and Matching Rules will be implemented as part of the data governance process.

- **Field History Tracking**

  Salesforce will be configured to track changes made to key fields in critical objects like Customer, Order, and Product. This feature will capture historical changes for up to 20 fields on any object, allowing administrators to view past values, who made the change, and when the change occurred. It is particularly useful for auditing and ensuring data integrity over time.

- **Duplicate Rules**

  Duplicate rules will be implemented to prevent the creation of duplicate records in Salesforce. Rules will be defined for key objects like Customer and Order to flag potential duplicates based on matching fields such as Email Address or Phone Number. When duplicates are found, users will be alerted or prevented from saving the records.

- **Matching Rules**

Matching rules define the criteria that Salesforce uses to identify potential duplicate records. For example, a matching rule for the Customer object might look for records with the same Email or Phone number. These rules are aligned with the duplicate rules to ensure data quality and prevent redundant entries.

4.3. Profiles, Roles and Role Hierarchy, Permission sets, Sharing Rules

The Profiles, Roles, and Permission Sets will be configured to ensure appropriate data access and security across Salesforce users, while Sharing Rules will be used to fine-tune access at the record level.

- **Profiles**

  Profiles determine the base level of permissions that a user has, such as access to objects, fields, and page layouts. For instance, a Sales Rep profile might have full access to Accounts and Opportunities, while a Support Rep might only have access to Cases and Contacts.

- **Roles and Role Hierarchy:**

  Roles define a user's position within the organization and control record visibility. The role hierarchy ensures that users higher in the hierarchy (e.g., Managers or Executives) can view records owned by users in lower roles, enabling proper access to relevant data across the org.

- **Permission Sets**

  Permission Sets will be used to grant additional access to users without changing their profile. For example, a Sales Rep profile may have limited access to certain features, but a permission set can be applied to provide access to a specific report or record type temporarily or permanently.

- **Sharing Rules**

  Sharing rules are used to extend access to records beyond the role hierarchy. For example, a sharing rule might be set to share Account records with users in a specific department or group. This is particularly useful for cross-functional teams that need access to the same records but are not directly connected through the role hierarchy.

Phase 5: Deployment, Documentation & Maintenance

Deployment Strategy for HandsMen Threads

For HandsMen Threads, the deployment strategy will use a combination of Change Sets, Salesforce DX, and ANT Migration Tool to ensure smooth, efficient, and reliable deployments across environments. For more complex deployments involving custom code or integrations, Salesforce DX will be used, leveraging version control (Git) and automation to manage metadata, deploy updates, and enable continuous integration.

System Maintenance and Monitoring

The system will be actively maintained and monitored using Salesforce's built-in tools and scheduled processes. Regular updates will be applied through sandbox testing to ensure minimal disruption in production. Salesforce Health Check will be used to assess the security posture of the system, while System Overview and Apex Exception Emails will monitor performance and errors.

Troubleshooting Approach

The troubleshooting approach will follow a structured process, beginning with identifying and replicating the issue in a controlled environment. Key tools like Apex Debug Logs and Error Emails will be used to investigate issues with custom code or automation. System Logs and Event Monitoring will help diagnose performance or system-related issues. If the issue is related to user permissions or configurations, a review of profiles, field-level security, and sharing settings will be conducted. For issues that cannot be resolved internally, Salesforce Support or a certified consultant will be engaged. All steps, logs, and findings will be documented for future reference, ensuring efficient resolution and continuous improvement.

Conclusion

For HandsMen Threads, the ability to customize Salesforce to meet specific business needs is key to enhancing efficiency and improving the overall user experience. With tools like App Manager, Page Layouts, and Lightning Pages, HandsMen can tailor their Salesforce environment to align with their unique workflows, product catalogs, and customer engagement strategies. Whether it's creating custom apps for the Sales or Inventory teams, designing dynamic record pages with product details and customer histories, or offering personalized dashboards to monitor stock levels and sales performance, Salesforce provides the flexibility to ensure that the right tools are always available to the right teams. These features not only make the system more intuitive but also help reduce manual tasks, empowering teams to focus on high-value activities and improving productivity.

Additionally, effective User Management and robust Reports and Dashboards capabilities will ensure that HandsMen can control access to sensitive business data while providing actionable insights for decision-making. By managing who can view and edit customer data, orders, and inventory, HandsMen can safeguard important information while ensuring that the right people have the access they need. Customizable Reports and Dashboards will allow teams to track key metrics such as sales performance, customer loyalty, and stock levels in real-time, helping them stay ahead of business needs. In short, Salesforce’s customization options, combined with powerful data management and reporting tools, create a unified platform that enables HandsMen Threads to streamline operations, improve customer relationships, and make informed, data-driven decisions to drive growth.