

# Salesforce CRM Project Documentation

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

**Submitted by:**

Mekala Hitesh

**Trailhead link:**

[Click Here](#)

**Institution/Organization:**

**SMART BRIDGE**

**Program:**

**Salesforce Developer with Agentblazer Champion Program**

**Project Type:**

**Salesforce CRM Implementation (Custom Objects, Flows, Apex, Automation, Reports)**

**Guided by:**

**Smart Bridge Educational Pvt.**

## **Project Overview:**

HandsMen Threads is a premium men's fashion brand committed to redefining sophistication through elegant design, fine tailoring, and sustainable craftsmanship. Focused on creating timeless yet modern attire, the project blends traditional style with contemporary flair, offering high-quality apparel for the refined man. With an emphasis on detail, quality, and ethical production, HandsMen Threads aims to become a symbol of style, confidence, and elevated living in men's fashion.

HandsMen Threads is a premium fashion initiative dedicated to redefining modern masculinity through the lens of timeless style, luxury craftsmanship, and contemporary design. The project aims to create a curated line of men's apparel that seamlessly blends classic elegance with modern aesthetics, appealing to the sophisticated man who values quality, detail, and personal expression.

By emphasizing tailored fits, premium fabrics, and artisanal finishing, HandsMen Threads aspires to elevate everyday dressing into an experience of distinction and confidence. Each piece is thoughtfully designed to reflect refined taste, cultural influence, and the evolving narrative of men's fashion.

The brand stands not just as a clothing label, but as a lifestyle symbol—representing strength, subtlety, and sophistication. The project also incorporates sustainable practices, ethical sourcing, and local craftsmanship to ensure a responsible and impactful fashion journey.

HandsMen Threads: Elevating the Art of Sophistication in Men's Fashion is a forward-thinking fashion initiative that seeks to revolutionize how modern men approach style. The project focuses on developing a premium apparel line that embodies elegance, confidence, and class—infused with a strong sense of individuality and refined taste.

The core vision is to offer high-quality menswear that blends timeless silhouettes with innovative details, catering to professionals, creatives, and style-conscious individuals. From tailored suits and smart casual wear to everyday essentials, each piece is crafted with precision, using premium materials, eco-friendly processes, and responsible sourcing.

HandsMen Threads is not just about fashion—it's about storytelling through clothing. It reflects a lifestyle where quality, subtlety, and self-expression take center stage. With design rooted in cultural relevance and global trends, the brand balances luxury with purpose, making sophistication accessible and sustainable.

The project also aims to build a community around the modern gentleman—those who value not just appearance, but the principles behind what they wear. By incorporating ethical practices, supporting artisans, and embracing innovation, HandsMen Threads positions itself as more than a clothing label—it's a movement towards responsible luxury in men's fashion.

## Objectives:

The primary goal of the HandsMen Threads Salesforce CRM project is to create a tailored, end-to-end solution that addresses the unique needs of the fashion retail business. The key objectives of the project are:

- **Redefine Men's Sophisticated Style:**  
Develop a unique and refined menswear collection that merges timeless elegance with contemporary design to appeal to the modern gentleman.
- **Deliver Premium Quality and Tailoring:**  
Use high-grade fabrics, expert tailoring, and attention to detail to ensure every piece reflects luxury, comfort, and precision.
- **Promote Sustainable & Ethical Fashion:**  
Incorporate environmentally responsible materials, ethical sourcing, and local craftsmanship to support a conscious fashion ecosystem.
- **Celebrate Personal Expression Through Fashion:**  
Offer versatile clothing options that allow men to express individuality, confidence, and cultural pride through sophisticated style.
- **Build a Distinctive Brand Identity:**  
Establish HandsMen Threads as a trusted, high-end fashion label known for quality, class, and integrity.
- **Create a Global Appeal:**  
Position the brand to compete internationally by aligning with global fashion trends while retaining authentic cultural and artisanal elements.
- **Empower Local Artisans and Designers:**  
Collaborate with skilled artisans and fashion designers to foster local talent and preserve traditional craftsmanship.
- **Integrate Technology for Smart Fashion:**  
Explore the use of fashion tech (e.g., smart sizing, digital fitting rooms) to enhance customer experience and improve shopping accessibility.

Additionally, the project seeks to improve business agility through automation. Key workflows such as order confirmation, low-stock alerts, and loyalty updates are fully automated to reduce delays and minimize human errors.

Through the use of validation rules, record-triggered flows, and Apex logic, business rules are enforced directly within the system, ensuring that operations remain consistent, accurate, and scalable.

The end goal is to support a secure, intelligent, and future-ready CRM system that evolves alongside the business — helping HandsMen Threads maintain operational excellence and stand out in the competitive fashion landscape.

## **Project Goals**

The HandsMen Threads Salesforce CRM project aims to deliver a comprehensive solution tailored to the fashion retail business. Key goals include:

- **Unified Customer Management:** Centralize customer data for personalized service and targeted marketing.
- **Process Automation:** Automate order confirmations, stock alerts, and loyalty updates to reduce manual effort.
- **Inventory Efficiency:** Enable real-time stock tracking and automated restocking to prevent shortages.
- **Data Accuracy:** Enforce validation rules to ensure reliable data across the system.
- **Improved Communication:** Use dynamic email templates for timely customer updates.
- **Scalable Design:** Build a flexible CRM framework to support future enhancements.

By automating workflows and enforcing business rules, the system ensures efficiency, consistency, and readiness for future expansion.

## **Phase 1: Requirement Analysis & Planning**

This phase laid the foundation for the Salesforce CRM system by clearly defining the business requirements, system architecture, and security models to ensure scalability, usability, and compliance with organizational goals.

### **1. Understanding Business Requirements:**

- HandsMen Threads required a CRM system tailored to the fashion industry to:
  - Store and manage customer, order, inventory, and product data.
  - Automate loyalty updates and stock notifications.
  - Enable real-time email communication for customer engagement.
  - Maintain high data quality standards and user-based security controls.

### **2. Defining Project Scope and Objectives:**

In-Scope Deliverables:

- Creation of custom objects: HandsMen Customer, HandsMen Product, HandsMen Order, Inventory, Marketing Campaign.
- Custom tabs, layouts, and Lightning apps to support usability.
- Automation using Record-Triggered Flows, Scheduled Flows, Email Alerts, and Apex.
- Role-based access control with custom profiles and permission sets.
- Batch job for daily inventory sync.

**Out-of-Scope:**

- Integration with external e-commerce or POS systems (planned as future enhancement).

### **3. Design: Data Model and Security Model**

#### **Data Model Design:**

Custom objects were created to align with business entities:

- HandsMen\_Customer\_\_c – Captures customer details including phone, email, and loyalty status.
- HandsMen\_Product\_\_c – Maintains product catalog and stock quantity.
- HandsMen\_Order\_\_c – Stores order records, including status and total amount.
- Inventory\_\_c – Manages stock and restocking status.
- Marketing\_Campaign\_\_c – Tracks campaign activities.

#### **Key Relationships:**

- Lookup and Master-Detail relationships were defined between objects to maintain referential integrity and enable reporting.
  - E.g., HandsMen Order ↔ HandsMen Customer, Inventory ↔ Product

#### **Security Model Design:**

- **Profiles & Roles:**
  - Platform 1 profile (cloned from Standard User) for limited access users.
  - Roles created: Sales, Inventory, and Marketing under the CEO role hierarchy.
- **Permission Sets:**
  - Permission\_Platform\_1 with CRUD permissions on key custom objects.
- **Field-Level Security and Validation Rules:**
  - Ensured critical fields follow business logic, e.g., quantity limits, valid emails, etc.

## Phase 2: Salesforce Development – Backend & Configurations

This phase focused on implementing the core functionality of the CRM through configuration and development. It included object creation, field definitions, automation logic, and backend Apex coding to support business operations.

### 1. Environment Setup & DevOps Workflow

- A Salesforce **Developer Org** was created via [developer.salesforce.com](https://developer.salesforce.com).
- Users verified their accounts, defined passwords, and accessed the **Salesforce Setup** environment.
- Development was managed directly within Salesforce using the **Developer Console**, Flows, and Setup menu.

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Steps

1 Select Type

- Customer Support
- Sales Coach
- Sales Development

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First name Last name

Hitesh Mekala

Job title Work email

Developer hitheshmekala@gmail.com

Company Country/Region

KSRM India

Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud infrastructure.

☒ I agree to the Main Services Agreement – Developer Services and Salesforce Program Agreement. I acknowledge, as described in the Developer Documentation: (1) the Developer Edition includes autonomous and other generative AI features, and (2) Salesforce may limit use of those features and the org, and may terminate any org that has been inactive for 45 days.

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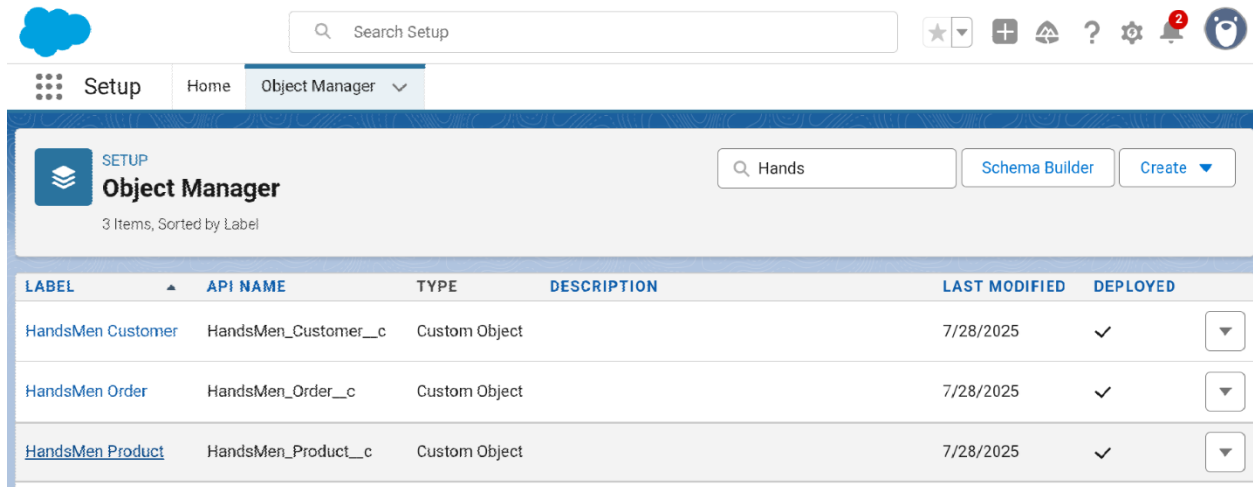
☒ I'm not a robot

Sign Me Up

### 2. Custom Object & Field Configuration

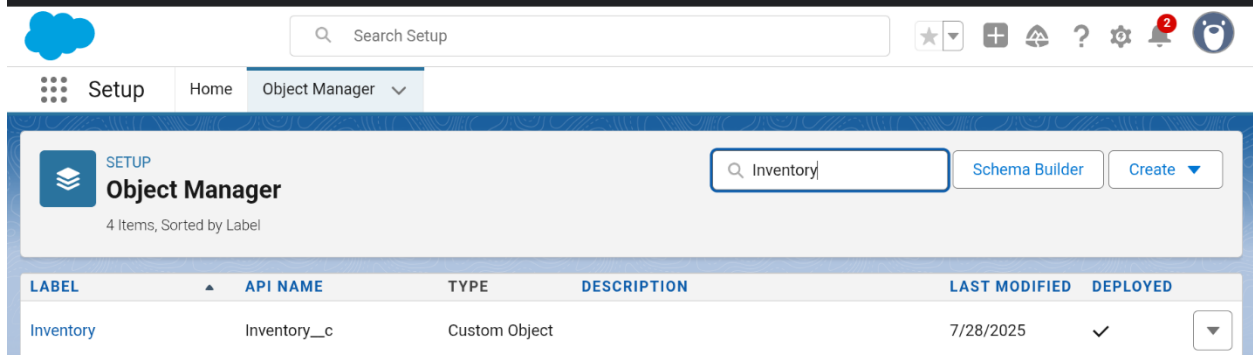
Object Name	Key Fields	Notes
Customer__c	Email, Phone, Loyalty Status	Includes Full Name formula field
Product__c	Stock Quantity	Used for inventory updates

Order__c	Order ID (Auto-number), Amount, Status	Links to Customer and Product
Inventory__c	Inventory ID (Auto-number), Stock	Master-detail with Product
Marketing_Campaign__c	Campaign ID (Auto-number)	Lookup to Customer



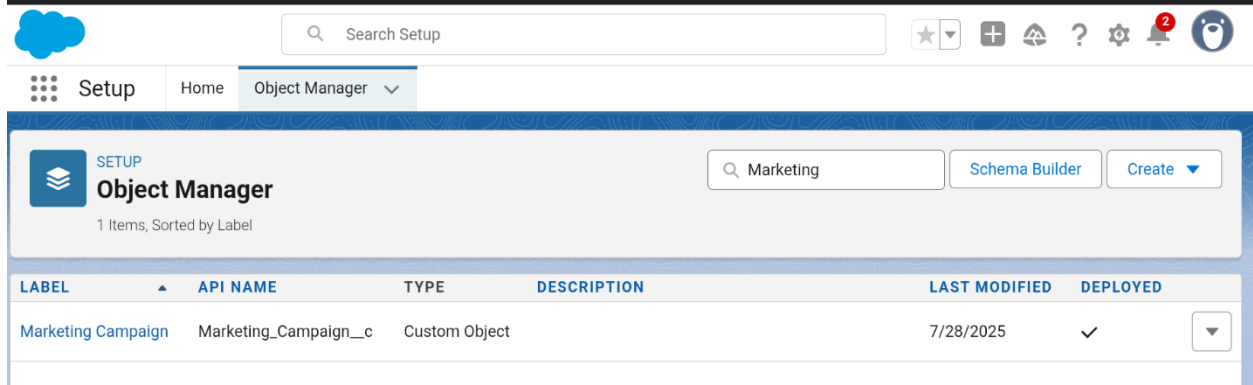
This screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. A search bar at the top contains the text 'Hands'. Below the search bar, the 'Object Manager' section displays '3 Items, Sorted by Label'. A table lists three custom objects:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
<a href="#">HandsMen Customer</a>	HandsMen_Customer__c	Custom Object		7/28/2025	✓
<a href="#">HandsMen Order</a>	HandsMen_Order__c	Custom Object		7/28/2025	✓
<a href="#">HandsMen Product</a>	HandsMen_Product__c	Custom Object		7/28/2025	✓



This screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. A search bar at the top contains the text 'Inventory'. Below the search bar, the 'Object Manager' section displays '4 Items, Sorted by Label'. A table lists one custom object:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
<a href="#">Inventory</a>	Inventory__c	Custom Object		7/28/2025	✓



This screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. A search bar at the top contains the text 'Marketing'. Below the search bar, the 'Object Manager' section displays '1 Items, Sorted by Label'. A table lists one custom object:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
<a href="#">Marketing Campaign</a>	Marketing_Campaign__c	Custom Object		7/28/2025	✓

## Relationships Used:


- Lookup:
  - Order ↔ Customer, Product ↔ Order, Marketing Campaign ↔ Customer











- Master-Detail:
  - Inventory ↔ Product

### 3. Validation Rules

Object	Rule Name	Logic	Error Message
Order__c	Total Amount	Total_Amount__c <= 0	"Please Enter Correct Amount"
Inventory__c	Stock Quantity	Stock_Quantity__c <= 0	"Inventory count cannot be less than zero."
Customer__c	Email	NOT CONTAINS(Email, "@gmail.com")	"Please enter a valid Gmail address."



Search Setup



SetupHomeObject Manager

SETUP > OBJECT MANAGER

Inventory

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

Conditional Field Formatting

Inventory Validation Rule

[Back to Inventory](#)


Validation Rule Detail


EditClone

Rule Name	Stock_Quantity	Active	<input checked="" type="checkbox"/>
Error Condition Formula	Stock_Quantity__c <= 0		
Error Message	the inventory count is never less than zero.	Error Location	Top of Page
Description			
Created By	Hitesh Mekala, 7/28/2025, 4:10 AM	Modified By	Hitesh Mekala, 7/28/2025, 4:10 AM









EditClone

Help for this Page





Search Setup



SetupHomeObject Manager

SETUP > OBJECT MANAGER

HandsMen Order

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

Conditional Field Formatting

HandsMen Order Validation Rule

[Back to HandsMen Order](#)


Validation Rule Detail

EditClone

Rule Name	Total_Amount	Active	<input checked="" type="checkbox"/>
Error Condition Formula	Total_Amount__c <= 0		
Error Message	Please Enter Correct Amount	Error Location	Total Amount
Description			
Created By	Hitesh Mekala, 7/28/2025, 4:08 AM	Modified By	Hitesh Mekala, 7/28/2025, 4:08 AM

EditClone


Help for this Page










#### **4. Profiles, Roles, and Permission Sets**

- Profile: Platform 1 cloned from Standard User, granted object-level permissions for Product and Inventory.
- Roles: Sales, Inventory, and Marketing created under the CEO role hierarchy to define data visibility.
- Users: Created for Niklaus Mikaelson (Sales) and Kol Mikaelson (Inventory) with Platform licenses and assigned profiles.

- Permission Set: Permission\_Platform\_1 to grant extra permissions on Customer and Orde



Search Setup



SetupHomeObject Manager

SETUP > OBJECT MANAGER

HandsMen Customer

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

Conditional Field Formatting

HandsMen Customer Validation Rule

[Back to HandsMen Customer](#)

Validation Rule Detail

EditClone

Rule Name	Email	Active	<input checked="" type="checkbox"/>
Error Condition Formula	NOT CONTAINS( Email__c, '@gmail.com')		
Error Message	Please fill Correct Gmail	Error Location	Top of Page
Description			
Created By	<a href="#">Hitesh Mekala</a> , 7/28/2025, 4:12 AM	Modified By	<a href="#">Hitesh Mekala</a> , 7/28/2025, 4:12 AM

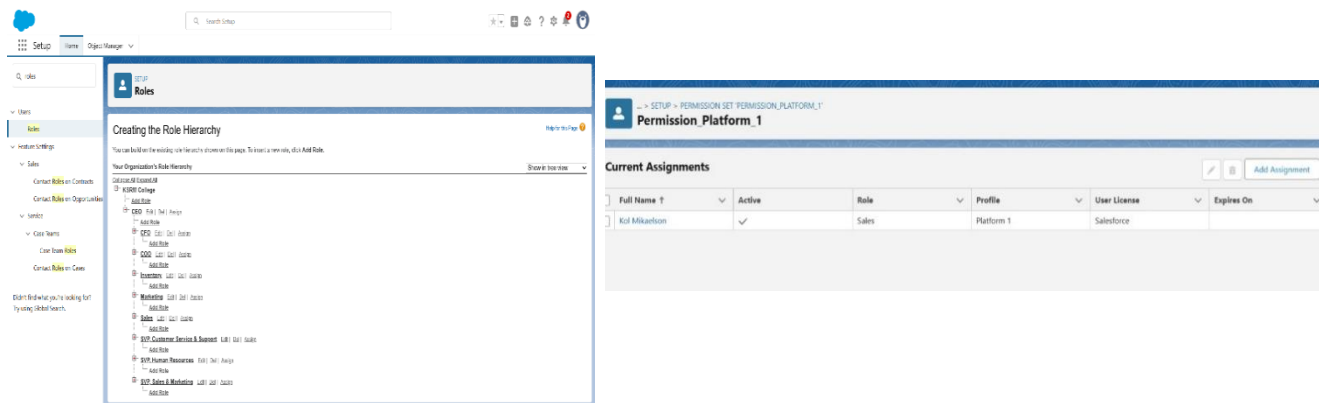
EditClone

Help for this Page

## 5. Email Templates & Alerts

Template Name	Purpose
Order Confirmation	Sent to customers upon order confirmation
Low Stock Alert	Notifies Inventory Manager of low stock
Loyalty Program Update	Informs customers of loyalty status changes

**Email Alerts** were created and linked to flows to trigger these templates automatically.



Setup

Home

Object Manager

Search Setup

Setup

Home

Object Manager

Q EMAIL ale

Process Automation

Workflow Actions

Email Alerts

Didn't find what you're looking for?  
Try using Global Search.

SETUP

Email Alerts

Email Alert

Low Stock Alert

Rules Using This Email Alert 0 | Approval Processes Using This Email Alert 0 | Entitlement Processes Using This Email Alert 0

Email Alert Detail

Description

Low Stock Alert

Unique Name

Low\_Stock\_Alert

From Email Address

Current User's email address

Recipients

User: Hitesh Mekala

Additional Emails

Email Template

Low Stock Alert

Object

Inventory

Created By

Hitesh Mekala, 7/28/2025, 9:01 PM

Modified By

Hitesh Mekala, 7/28/2025, 9:01 PM

Edit

Delete

Clone

Rules Using This Email Alert

Rules Using This Email Alert Help ?

This alert is currently not used by any rules

Approval Processes Using This Email Alert

Approval Processes Using This Email Alert Help ?

This alert is currently not used by any approval processes

Entitlement Processes Using This Email Alert

This alert is currently not used by any entitlement processes

Setup

Home

Object Manager

Search Setup

Setup

Home

Object Manager

Q EMAIL ale

Process Automation

Workflow Actions

Email Alerts

Didn't find what you're looking for?  
Try using Global Search.

SETUP

Email Alerts

Email Alert

Loyalty program email

Rules Using This Email Alert 0 | Approval Processes Using This Email Alert 0 | Entitlement Processes Using This Email Alert 0

Email Alert Detail

Description

Loyalty program email

Unique Name

Loyalty\_program\_email

From Email Address

Current User's email address

Recipients

Email Field: Email

Additional Emails

Email Template

Loyalty Program Email

Object

HandsMen Customer

Created By

Hitesh Mekala, 7/28/2025, 9:04 PM

Modified By

Hitesh Mekala, 7/28/2025, 9:04 PM

Edit

Delete

Clone

Rules Using This Email Alert

Rules Using This Email Alert Help ?

This alert is currently not used by any rules

Approval Processes Using This Email Alert

Approval Processes Using This Email Alert Help ?

This alert is currently not used by any approval processes

Entitlement Processes Using This Email Alert

This alert is currently not used by any entitlement processes

**Setup** | Home | Object Manager

Search Setup

Q Email a

Email

- Email Address
- Internationalization
- Email Attachments

Process Automation

- Workflow Actions
- Email Alerts**

Didn't find what you're looking for? Try using Global Search.

**SETUP** | **Email Alerts**

Help for this Page

**Email Alert**

Order Confirmation Email Alert

Rules Using This Email Alert [0] | Approval Processes Using This Email Alert [0] | Entitlement Processes Using This Email Alert [0]

**Email Alert Detail** | Edit | Delete | Clone

Description	Order Confirmation Email Alert	Email Template	Order Confirmation Email
Unique Name	Order_Confirmation_Email_Alert	Object	HandsMen Order
From Email Address	Current User's email address		
Recipients	Email Field: Customer Email		
Additional Emails			
Created By	Hitesh Mekala, 7/28/2025, 6:15 PM	Modified By	Hitesh Mekala, 7/28/2025, 6:15 PM

Edit | Delete | Clone

**Rules Using This Email Alert** | Rules Using This Email Alert Help

This alert is currently not used by any rules

**Approval Processes Using This Email Alert** | Approval Processes Using This Email Alert Help

This alert is currently not used by any approval processes

**Entitlement Processes Using This Email Alert**

This alert is currently not used by any entitlement processes

**Flows Using This Email Alert**

Flow Name	Version	Description	Object	Active
order confirmation	1, 2, 3		01lgK000001Jw6A	✓

Back To Top | Always show me more records per related list

## 6. Apex Classes & Triggers

- OrderTriggerHandler (Class): Validates order quantities based on status.
- OrderTrigger (Trigger): Runs on insert/update for Order\_\_c.

InventoryBatchJob (Batch Class): Restocks products with low stock (+50 units) daily at midnight using a scheduled job.

## 7. Asynchronous Apex: Inventory Batch Job

Class: InventoryBatchJob

Implements Database.Batchable and Schedulable to:

- Query products with low stock
- Refill stock quantities by +50
- Schedule daily at midnight via:

“ System.schedule('Daily Inventory Sync', '0 0 0 \* \* ?', new InventoryBatchJob()); “

## Phase 3: UI/UX Development & Customization

In this phase, the focus was on creating an intuitive and responsive user interface using Salesforce Lightning tools. The goal was to ensure that end users—such as sales reps, inventory managers, and marketing staff—could easily navigate the system and perform daily tasks efficiently.

### 1. Lightning App Setup via App Manager

- **App Name:** HandsMen Threads
- **Navigation Items Included:**
  - HandsMen Customer
  - HandsMen Order
  - Inventory
  - HandsMen Product
  - Marketing Campaign
  - Reports & Dashboards
  - Accounts & Contacts
- **Assigned to:** System Administrator profile

The screenshot displays the Salesforce Lightning App Builder interface. The top navigation bar includes 'Lightning App Builder', 'App Settings', 'Pages', and 'HandsMen Threads'. The left sidebar shows the 'App Settings' menu with options like 'App Details & Branding', 'App Options', 'Utility Items (Desktop Only)', 'Navigation Items', and 'User Profiles'. The main content area is titled 'App Details & Branding' and contains two sections: 'App Details' and 'App Branding'.

**App Details:**

- \* App Name:** HandsMen Threads
- \* Developer Name:** HandsMen\_Threads
- Description:** \*\*HandsMen Threads\*\*: Premium, rugged menswear crafted for durability, comfort, and...

**App Branding:**

- Image:** Upload button
- 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:** HT HandsMen Threads \*\*HandsMen Threads\*\*: Premium, rugged menswear crafted...

Below the app settings, a code editor shows the following Apex code:

```
public static void validateOrderQuantity(List<HandsMen_Order__c> orderList) {  
    for (HandsMen_Order__c order : orderList) {  
        if (order.Status__c == 'Confirmed') {  
            if (order.Quantity__c == null || order.Quantity__c <= 500) {  
                order.Quantity__c.addError('For Status "Confirmed", Quantity must be more than 500.');            }  
        } else if (order.Status__c == 'Pending') {  
            if (order.Quantity__c == null || order.Quantity__c <= 200) {  
                order.Quantity__c.addError('For Status "Pending", Quantity must be more than 200.');            }  
        }  
    }  
}
```



## 2. Tabs

&

The screenshot shows a web interface for defining a custom tab. At the top, there's a header with a gear icon and the text 'SETUP Tabs'. Below this, the title 'Edit Custom Object Tab HandsMen Customer' is displayed. A note says 'Fill in the fields below to define the custom tab.' The main form area is titled 'Custom Tab Definition Edit' and contains a section 'Custom Object Tab Information'. This section has three rows: 'Tab Label' with the value 'HandsMen Customer', 'Object' with the value 'HandsMen Customer', and 'Tab Style' with a visual preview of a tab labeled 'Box'. Below this, there's an optional section for 'Splash Page Custom Link' with a dropdown menu set to '--None--'. At the bottom, there's a 'Description' field with a text area and 'Save' and 'Cancel' buttons.

## Layouts

- Custom tabs for each object.
- Page layouts customized with relevant fields, related lists, and actions.

Dynamic Forms (optional) for role-based field visibility.

## 3. User Management

Two users were created with real-world role simulation:

- Niklaus Mikaelson – Sales Role
  - Kol Mikaelson – Inventory Role
- Each user was assigned:
- Role (Sales or Inventory)
  - Profile (Platform 1)

Permission Set (Permission\_Platform\_1)

Setup

Home

Object Manager

Users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Didn't find what you're looking for? Try using Global Search.

SETUP

Users

User

Niklaus Mikaelson

Permission Set Assignments [1]

Permission Set Assignments: Activation Required [0]

Permission Set Group Assignments [0]

Permission Set License Assignments [0]

Personal Groups [0]

Public Group Membership [0]

Queue Membership [0]

Team [0]

Managers in the Role Hierarchy [0]

OAuth Apps [0]

Third-Party Account Links [0]

Built-in Authenticators [0]

Installed Mobile Apps [0]

Authentication Settings for External Systems [0]

Login History [0]

User Provisioning Accounts [0]

User Detail

Edit

Sharing

Reset Password

Freeze

View Summary

Name	Niklaus Mikaelson	Role	Sales
Alias	nmika	User License	Salesforce
Email	hitheshmekala@gmail.com <a href="#">Verify</a>	Profile	Platform 1
Username	hitheshmekala24680@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User17537486901507651891 <a href="#">i</a>	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-07:00) Pacific Daylight 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	<a href="#">View</a>
Delegated Approver		Data.com User Type	<a href="#">i</a>
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> <a href="#">i</a>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> <a href="#">i</a>
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/> <a href="#">i</a>
App Registration: One-Time Password Authenticator	<a href="#">i</a>	Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/> <a href="#">i</a>
App Registration: Salesforce Authenticator	<a href="#">i</a>	Salesforce CRM Content User	<input checked="" type="checkbox"/>
Security Key (U2F or WebAuthn)	<a href="#">i</a>	Receive Salesforce CRM Content Email Alerts	<input checked="" type="checkbox"/>
Lightning Login	<a href="#">i</a>	Receive Salesforce CRM Content Alerts as Daily Digest	<input checked="" type="checkbox"/>
Temporary Verification Code (Expires in 1 to 24 Hours)	<a href="#">Generate</a> <a href="#">i</a>	Make Setup My Default Landing Page	<input type="checkbox"/>
		Allow Forecasting	<input type="checkbox"/>
		No MRU Updates	<input type="checkbox"/> <a href="#">i</a>
		Call Center	
		Phone	
		Extension	
		Fax	
		Mobile	
		Email Encoding	Unicode (UTF-8)
		Employee Number	
		Used Data Space	0 B <a href="#">View</a>
		Used File Space	0 B <a href="#">View</a>
		Last Login	
		Last Password Change or Reset	7/28/2025, 5:26 PM
		Failed Login Attempts	0 <a href="#">i</a>
		Individual	
Created By	Hitesh Mekala, 7/28/2025, 5:26 PM	Modified By	Hitesh Mekala, 7/28/2025, 5:26 PM

Edit

Sharing

Reset Password

Freeze

View Summary

**Setup** Home Object Manager

Search Setup

Users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Didn't find what you're looking for? Try using Global Search.

**User: Koi Mikaelson**

Permission Set Assignments [0] | Permission Set Assignments: Activation Required [0] | Permission Set Group Assignments [0] | Permission Set License Assignments [0] | Personal Groups [0] | Public Group Membership [0] | Queue Membership [0] | Team [0] | Managers in the Role Hierarchy [0] | OAuth Apps [0] | Third-Party Account Links [0] | Built-in Authenticators [0] | Installed Mobile Apps [0] | Authentication Settings for External Systems [0] | Login History [0] | User Provisioning Accounts [0]

**User Detail** Edit Sharing Reset Password Freeze View Summary

Name	Koi Mikaelson	Role	Inventory
Alias	kmika	User License	Salesforce
Email	hitheshmekala@gmail.com [Verify]	Profile	Platform 1
Username	hitheshmekala884422@gmail.com	Active	<input type="checkbox"/>
Nickname	User17537488206619778153 [Edit]	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-07:00) Pacific Daylight 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	<input type="checkbox"/>
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)		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	
		Extension	
		Fax	
		Mobile	
		Email Encoding	Unicode (UTF-8)
		Employee Number	
		Used Data Space	0 B [View]
		Used File Space	0 B [View]
		Last Login	7/28/2025, 5:28 PM
		Last Password Change or Reset	
		Failed Login Attempts	0 [View]
		Individual	
Created By	Hitesh Mekala, 7/28/2025, 5:28 PM	Modified By	Hitesh Mekala, 7/28/2025, 5:32 PM

Edit Sharing Reset Password Freeze View Summary

## 4. Reports and Dashboards

While not detailed, the app supports creation of:

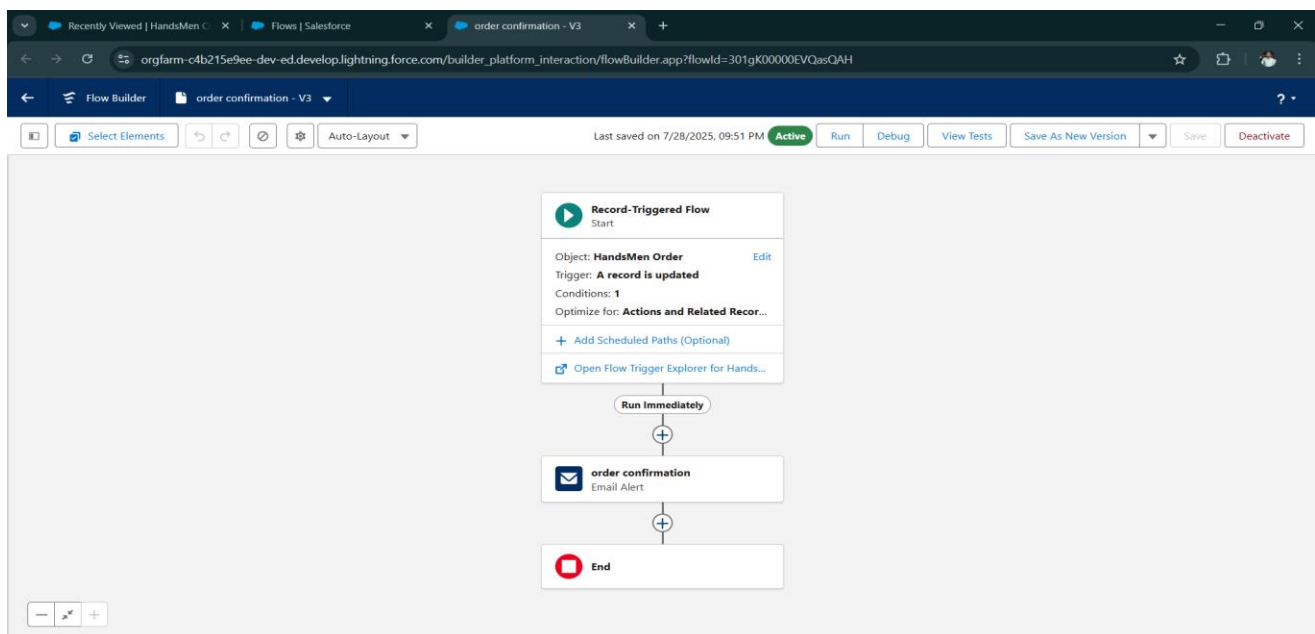
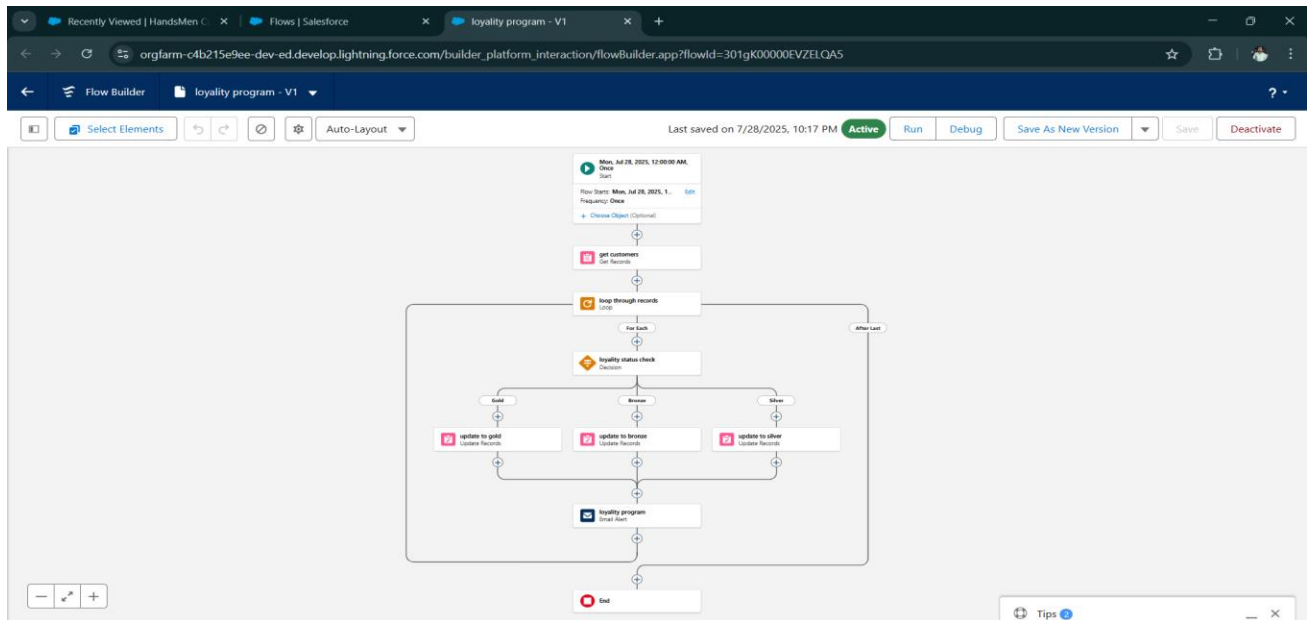
- Reports to monitor Orders, Stock Levels, and Customer Loyalty
- Dashboards to visualize key metrics such as:
  - Orders by Status
  - Low Stock Alerts
  - Loyalty Tier Distribution

## 5. Lightning Pages

- Custom record pages were created and assigned for each object using Lightning App Builder.
- These pages incorporated:
  - Related Lists

- Quick Actions
- Embedded Reports (if needed)

This UI/UX phase ensures that your users have a professional, clean, and productive interface experience—tailored to their business roles.



## **Phase 4: Data Migration, Testing & Security**

This phase focused on ensuring that the system is secure, data is accurate, and every feature functions as expected. Special attention was given to access control, data validation, and thorough testing before production deployment.

### **1. Data Loading Process**

Data migration and test data setup were performed using Salesforce tools:

- **Data Import Wizard** – Used for loading data into simple objects like HandsMen Customer.
- **Data Loader** – Used for bulk importing data into related or custom objects such as Orders, Inventory, and Products.

### **2. Field History Tracking, Duplicate Rules & Matching Rules**

- **Field History Tracking** was enabled for key objects (like Order and Inventory) to monitor changes in important fields such as Stock Quantity and Order Status.
- **Duplicate Rules** were configured on HandsMen Customer (based on email field) to prevent duplicate records.
- **Matching Rules** ensured proper identification of existing records during import and creation.

### **3. Security Settings: Profiles, Roles, Permission Sets, and Sharing**

#### **Profiles:**

- Platform 1 profile provided controlled access to custom objects.
- Field-level security enforced visibility only for relevant fields.

#### **Roles:**

- Role hierarchy defined as:
  - CEO

- Sales
- Inventory
- Marketing

This ensured data access flowed upward based on hierarchy.

#### Permission Sets:

- Permission\_Platform\_1 provided additional CRUD permissions on objects like Order and Customer without modifying the base profile.
- Assigned to users based on business requirements.

#### Sharing Rules:

- Public Read/Write sharing model used for development.
- Manual sharing and custom rules considered for future scalability

#### 4. Testing Approach

- Each automation and feature was tested using sample data:

Feature	Input Condition	Expected Output
Customer Creation	Missing Email	Error: "Email is required"
Discount Logic	Order > ₹5000	Discount = 10%
Product Deletion Prevention	Active Orders linked	Error: "Cannot delete product with active orders"
Trigger – Inventory Update	Order placed	Stock reduced accordingly
Time-based Workflow	Order not shipped in 2 days	Reminder Email to Sales
Apex Scheduler	Runs daily at 2 AM	Auto-update of inventory stock

- Test Data Factories: Used to generate reusable, consistent test records for Apex unit tests.
- Bulk Testing: Validated logic (e.g., triggers, flows) using bulk inserts and updates (>200 records) to check scalability.
- Negative Testing: Covered edge cases and error conditions to ensure validation rules and logic are enforced correctly.

- Deployment Validation: Used Change Sets with “validate-only” option to test deployment without applying changes.

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

### **Deployment**

- Change Sets used to deploy metadata components like custom objects, fields, flows, validation rules, layouts, and Apex code from Sandbox to Production.
- Pre-deployment validations conducted using the "Validate" option in Change Sets to catch errors early.
- Full-copy sandbox served as a staging environment for final round testing and UAT feedback resolution.
- Deployment checklist included steps like clearing debug logs, activating flows, and checking inactive components.
- Post-deployment testing ensured key user stories (like order creation and stock alerts) worked as expected in Production.
- Metadata backups were taken prior to deployment using Salesforce Package Manager and manual exports.

### **Documentation**

- Solution Design Document (SDD) detailed system architecture, customizations, and logic behind each automation element.
- Entity-Relationship Diagram (ERD) visualized object relationships including master-detail and lookup connections.
- Validation rules, flows, and Apex logic documented with use cases and field-level context.
- Test case repository created with expected input-output scenarios and screenshots.
- Troubleshooting guide included known issues, Apex exception examples, and quick fixes.
- Version-controlled documentation maintained in shared folders with changelog tracking.
- Field dictionary listed all custom fields with data types, descriptions, and dependencies.

### **Maintenance**

- Flow debug logs and Apex error emails monitored weekly to catch any runtime failures or logic issues.
- Meaningful error messages like “Please enter a valid amount” were added to improve user experience.
- Automated alerts configured for low-stock products and process errors using email actions.
- UAT cycle maintained before every enhancement deployment using a sandbox environment.
- Data cleanup tasks like de-duplication and inactive record archival scheduled monthly.
- Manual sharing rules used temporarily in development; scalable public/private sharing models planned for production.
- Salesforce Optimizer and Health Check reports reviewed monthly for recommendations on performance, security, and configuration.

## **Training**

- User training sessions conducted using real-life scenarios and live Salesforce access for better understanding.
- Modular training approach used: broken into topics like Order Creation, Reports, Inventory Updates, etc.
- Role-based training tailored to specific needs—Sales focused on lead conversion, Inventory on stock tracking, etc.
- Quick reference guides created in PDF format with visuals for common tasks like report building and record editing.
- FAQ and troubleshooting handbook shared as a digital document and printed cheat sheet.
- Feedback form distributed post-training to assess effectiveness and gather suggestions.
- Ongoing support channel (e.g., WhatsApp group or internal chat) created for user questions and tips.



## **Future Enhancements**

While the current Salesforce CRM implementation for HandsMen Threads provides a solid foundation, several future enhancements have been identified to further optimize business processes, enrich customer experiences, and support organizational growth:

### **1. Chatbot Integration**

- Implement an AI-powered chatbot (e.g., Salesforce Einstein Bot or third-party integration) to handle customer inquiries in real time.
- Use cases include order tracking, FAQs, loyalty program inquiries, and support ticket creation.

### **2. AI-Powered Product Recommendations**

- Leverage Salesforce Einstein Recommendations to suggest products to customers based on their purchase history and preferences.
- Improve upselling and cross-selling strategies.

### **3. Advanced Analytics & Forecasting**

- Enable Einstein Analytics (CRM Analytics) to gain deeper insights into sales trends, customer lifetime value, and inventory forecasting.
- Automate report generation and executive dashboards.

### **4. Mobile Optimization**

- Enhance the Salesforce Mobile App interface for sales reps and inventory managers on the go.
- Enable push notifications for low stock, order approvals, and campaign updates.

### **5. Customer Feedback & Surveys**

- Use Salesforce Surveys or integrate external tools like Typeform to gather post-purchase feedback.
- Automatically trigger surveys via Flow after order confirmation.

### **6. Enhanced Role-Based Access & Territory Management**

- Define territory models for better segmentation of sales regions.
- Apply advanced sharing rules and criteria-based access control for field-level security.

## 7. CI/CD and Sandbox Management

- Introduce DevOps Center for version control, deployment pipelines, and easier collaboration among developers/admins.
- Set up multiple Sandboxes (Developer, UAT, Full Copy) for safer testing.

## Conclusion

The Salesforce CRM implementation at **HandsMen Threads** marks a pivotal advancement in the company's digital transformation and operational modernization. Designed with a deep understanding of the fashion retail landscape, the system integrates automation, data intelligence, and scalability to streamline core business functions and elevate customer engagement.

Through custom objects like *Customer Profiles*, *Order Histories*, and *Inventory Records*, critical business data is now centralized, organized, and easily accessible. This structured data model empowers the team to track customer behavior, manage stock levels, and monitor order status with unmatched clarity and control.

This CRM solution was built from the ground up using Salesforce's powerful tools — including custom objects, flows, Apex triggers, scheduled jobs, and role-based access controls — all tailored specifically to the fashion and retail domain. By replicating real-world business logic into Salesforce:

- **Customer engagement** has been enhanced through automated email communications, order confirmations, and loyalty updates.
- **Operational efficiency** has improved with stock monitoring, batch inventory updates, and clear data validation checks.
- **User roles and responsibilities** are now clearly mapped, ensuring the right people access the right data at the right time.
- **Scalability and maintenance** have been carefully considered, with reusable components and organized documentation making future updates seamless.

Advanced automation using *Flows*, *Apex Triggers*, *Scheduled Jobs*, and *Process Builders* has significantly reduced manual effort across departments. Tasks such as inventory alerts, order confirmations, and personalized email communications are now handled seamlessly, improving both internal efficiency and the customer experience.

The system's intuitive Lightning-based user interface, enriched with real-time dashboards and custom reports, offers role-specific visibility into key metrics. Whether it's a sales representative accessing mobile insights or a manager evaluating sales trends, data-driven decision-making is now embedded into daily workflows.

Furthermore, integration with external systems like payment gateways and marketing tools creates a connected ecosystem that supports end-to-end business operations. Security and access controls have been rigorously implemented to ensure data privacy while maintaining smooth collaboration across roles.

Scalable by design, the CRM platform is future-ready—equipped to evolve alongside HandsMen Threads as it grows into new markets or expands its product portfolio. With robust documentation and reusable components, system maintenance and enhancements can be handled with ease.

In essence, Salesforce has not only digitized operations but also empowered HandsMen Threads with a strategic toolset to enhance customer relationships, optimize internal processes, and confidently scale in a competitive fashion landscape.