

Salesforce CRM Automation Project Report

Project Overview

HandsMen Threads, a fashion-forward organization, implemented a Salesforce-based CRM system to enhance their business data management, automate customer service processes, and streamline inventory handling. The CRM includes key features such as automated order confirmations, loyalty program updates, proactive stock alerts, and scheduled batch order processing to address vital operational needs.

Objectives

The primary objective of the project was to improve customer relationship management through intelligent automation and accurate, centralized data tracking. By integrating automated workflows, user-friendly UIs, and solid backend logic, the system enables improved customer satisfaction, efficient inventory control, and strategic business insights.

Phase 1: Requirement Analysis & Planning

Understanding Business Requirements:

- Analyze current customer service and order processing flows.
- Identify pain points in manual stock tracking and communication.

Defining Project Scope and Objectives:

- Build CRM for order, inventory, and customer tracking.
- Automate notifications, loyalty updates, and bulk processes.

Design Data Model and Security Model:

- Custom objects: Order, Inventory, Customer, Loyalty Status.
- Security: Role hierarchy, org-wide defaults, field-level security.

Phase 2: Salesforce Development - Backend & Configurations

Setup Environment & DevOps Workflow:

- Sandbox setup, Git-based version control.

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Customization:

- Created custom objects, fields, validation rules.
- Automation via Flows (confirmation emails, alerts), Process Builder (legacy), and Approval Processes.

Apex Development:

- Triggers for updating loyalty status.
- Batch Apex for scheduled nightly bulk order updates.
- Asynchronous Apex for better performance handling.

Phase 3: UI/UX Development & Customization

Lightning App Setup:

- Custom App built via Lightning App Builder.

Layouts and Forms:

- Used Dynamic Forms and Page Layouts for optimized UI.

User Management:

- Profiles and permission sets for different teams.

Reports and Dashboards:

- Built dashboards for order tracking and stock analysis.

Lightning Pages:

- Custom record pages for better usability.

LWC (Optional):

- Not developed in this version, but available for future enhancements.

Phase 4: Data Migration, Testing & Security

Data Migration:

- Used Data Import Wizard for importing historical data.

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Tracking & Duplicates:

- Enabled Field History Tracking.
- Setup Duplicate Rules and Matching Rules.

Security:

- Profiles, Roles, Role Hierarchy, Permission Sets, and Sharing Rules configured.

Testing:

- Created test cases and Test Classes for Apex.
- Functional testing for order creation, loyalty updates, and alert flows.

Phase 5: Deployment, Documentation & Maintenance

Deployment Strategy:

- Used Change Sets to move metadata from sandbox to production.

Maintenance:

- Scheduled regular data backups and error logging.

Documentation:

- Created troubleshooting guides for Flow errors, batch job failures, and user access issues.

Conclusion

The Salesforce CRM project for HandsMen Threads has successfully streamlined order management, customer engagement, and inventory tracking through efficient automation and user-friendly design. The system is now a reliable backbone of daily operations, boosting productivity and customer satisfaction.