

DOCUMENTATION

Project Overview:

HandsMen Threads system will store all key business information in one place, helping the team work more efficiently and make better decisions. A main focus is keeping the data accurate and consistent through the user interface. The project will also introduce helpful features like automated order confirmation emails, loyalty program updates, low stock alerts for the warehouse, and scheduled bulk order updates to keep daily operations smooth.

Objectives:

The goal of building this CRM is to improve how the company manages customer interactions and day-to-day processes. By automating routine tasks, it will reduce manual work, lessen errors, and make customer service faster and more personalized. It will also give the business a clearer view of its data, making it easier to plan, track inventory, and respond quickly to customer needs. Overall, the CRM aims to make operations more efficient and strengthen customer relationships.

Phase 1: Requirement Analysis & Planning

Understanding Business Requirements:

HandsMen Threads needs a system that simplifies how they handle customer information, track orders, and manage inventory. Currently, many processes are manual, which causes delays, errors, and missed opportunities to connect with customers. The CRM project aims to centralize data, automate routine tasks, and give the team a clearer view of customer activities and stock levels.

Defining Project Scope and Objectives:

- Build a centralized CRM to manage customer, order, and inventory data.
- Automate processes such as order confirmations, loyalty updates, and stock notifications.
- Ensure data integrity through validation and UI controls.
- Provide a user-friendly system for different teams (sales, warehouse,

- customer service).
- Set clear access levels and permissions to keep sensitive data secure.
- Support business growth by creating a system that can scale with future needs.

Design Data Model and Security Model:

- Data Model: Identify and structure key objects such as Customers, Orders, Products, Inventory, and Loyalty Programs. Establish relationships between these objects to ensure smooth data flow.
- Security Model: Define roles, profiles, and permission sets to control access. Ensure that sensitive business and customer data is properly protected while keeping the system easy to use for each team.

Stakeholders Mapping:

- Internal Stakeholders: Sales team, warehouse team, customer service, finance department, and management.
- External Stakeholders: Customers (for automated notifications), suppliers (for inventory coordination), and technical support teams.
- Define responsibilities and communication lines to make sure everyone is aligned throughout the project.

Execution Roadmap:

1. Conduct workshops to gather user needs and finalize requirements.
2. Define the data structure and security framework.
3. Prepare documentation of project scope and objectives.
4. Map out stakeholder roles and set communication channels.
5. Create a detailed timeline for design, development, testing, and deployment.
6. Review the plan with key stakeholders before moving to Phase 2 (System Design & Development).

Phase 2:Salesforce Development - Backend & Configurations

In this phase, the development environment for Salesforce will be properly set up to ensure smooth configuration and deployment. This includes creating sandboxes for development and testing, setting up change sets or DevOps tools for version control, and defining clear deployment procedures. A structured DevOps workflow will help maintain code quality, reduce errors, and ensure that changes are properly tested before moving to production.

Customization of Objects, Fields, Validation Rules, and Automation:

- **Custom Objects & Fields:** Standard and custom objects such as Customers, Orders, Products, Inventory, and Loyalty Programs will be created and configured to support business processes.
- **Validation Rules:** Data accuracy will be maintained through rules that prevent incomplete or incorrect entries (e.g., ensuring required fields like email, stock quantity, or order status are filled in).
- **Automation:**
 - *Workflow Rules* to handle basic alerts or updates.
 - *Process Builder* to automate multi-step business logic.
 - *Flows* to handle more complex processes like loyalty updates and stock notifications.
 - *Approval Processes* for any order or discount approvals needed by the business.

Phase 3: UI/UX Development & Customization

The image displays three screenshots of the Salesforce Lightning interface, illustrating the process of UI/UX development and customization.

Top Screenshot: New HandsMen Customer Form
This screenshot shows a "New HandsMen Customer" form. The form includes fields for "HandsMen Customer Name" (with a search icon), "Email", "Phone", "Loyalty Status" (a dropdown menu), "FirstName", "LastName", and "Total Purchases". A "Owner" field shows "Marian Macaso". The form has "Cancel", "Save & New", and "Save" buttons at the bottom.

Middle Screenshot: Classic Email Templates Editor
This screenshot shows the "Classic Email Templates" editor. It displays the "Order Confirmation Email" template. The editor includes a "Formatting Controls" bar with options for font, size, color, and alignment. Below this is the "HTML Email Content" area, which is currently blank, with a "Click here to enter content" prompt. The interface also shows a "Step 3 of 4" progress indicator and navigation buttons like "Previous", "Next", and "Cancel".

Bottom Screenshot: New Lightning App Navigation Items
This screenshot shows the "New Lightning App" configuration screen. It displays a list of "Available Items" (contacts) and a list of "Selected Items" (HandsMen Customers, HandsMen Orders, HandsMen Products, Inventories, Marketing Campaigns, Reports, Dashboards, Accounts, and Contacts). The interface includes a "Back" button and a "Next" button at the bottom.

Phase 4: Data Migration, Testing & Security

The image displays two screenshots of the Salesforce Flow Builder interface, illustrating the configuration of a flow for data migration, testing, and security.

Top Screenshot: Get Records Configuration

- Flow Diagram:** A simple flow starting with a 'Start' node (labeled 'Mon, Oct 20, 2025, 12:00:00 AM, Once'), followed by a 'Get Records' node, and ending with an 'End' node.
- Get Records Configuration Panel:**
 - *Label:** get customers
 - *API Name:** get_customers
 - Description:** (Empty)
 - Get Records of This Object:** *Object: HandsMen Customer
 - Filter HandsMen Customer Records:** With no conditions, the flow retrieves all HandsMen Customer records. Condition Required: 20. Filter: None—Get All HandsMen Custa...
 - Sort HandsMen Customer Records:** Sort Order: Not Sorted. (Warning: If you store only the first record, filter by a unique field, such as ID.)
 - How Many Records to Store:** Only the first record (Selected), All records, up to a specified limit, All records.
 - How to Store Record Data:** (Empty)

Bottom Screenshot: Decision Configuration

- Flow Diagram:** A more complex flow starting with a 'Start' node (labeled 'Mon, Oct 20, 2025, 12:00:00 AM, Once'), followed by a 'Get Records' node, a 'Loop through records' node, a 'Decision' node, and an 'After Last' node. The 'Decision' node has two outcomes: 'Gold' and 'Default Outcome'.
- Decision Configuration Panel:**
 - Description:** (Empty)
 - Select Decision Logic:** Select the method that the automation uses to determine which decision outcome to run.
 - Manually Set Conditions:** Define logic to evaluate explicitly defined data from your automation and determine which outcome to run. (Selected)
 - Let AI Determine Conditions:** Write instructions for AI to dynamically evaluate data from your automation and determine which outcome runs.
 - Relationship Fields:** A dropdown menu showing fields like 'Created By', 'Last Modified By ID', 'Owner ID (Group)', 'Owner ID (User)', 'Created By ID', 'Last Modified By ID', and 'Owner ID'. The 'Created By' field is selected.
 - Outcomes:** For each path the automation can take, define the outcome. The 'Gold' outcome is selected.
 - Default Outcome:** (Empty)
 - Condition:** (loop_through_records) equals Search a field...

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HandsMen ThreadsHandsMen CustomersHandsMen OrdersHandsMen ProductsInventoriesMarketing CampaignsReportsDashboardsAccountsContacts

InventoryI-0001

New ContactEditNew Opportunity

RelatedDetails

* = Required information

Inventory NumberI-0001

HandsMen ProductT-shirt cloth

Stock Quantity1000

Stock StatusLow Stock
This field is calculated upon save

Warehouse

Created ByMarian Macaso, 10/19/2023, 11:19 PM

Last Modified ByMarian Macaso, 10/20/2023, 12:22 AM

CancelSave

Phase 5:Deployment, Documentation & Maintenance

Deployment Strategy:

The deployment of the CRM solution for HandsMen Threads will follow a structured and controlled process. **Change sets** will be the primary deployment method to move configurations and customizations from the sandbox environment to the production org. This ensures that only approved and tested components are deployed. For complex or large-scale deployments, **DevOps tools** (such as version control integrations or deployment pipelines) may be used to track changes more efficiently. A pre-deployment checklist will be followed to minimize risks and ensure a smooth transition.

System Maintenance & Monitoring:

After deployment, the system will be regularly monitored to ensure stable performance and accurate data flow. Key maintenance activities include:

- Monitoring automation processes and error logs.
- Regular review of validation rules, workflows, and flows to ensure they match current business needs.
- Updating user roles and permissions as the company grows.
- Applying periodic system updates and enhancements to keep up with platform improvements from Salesforce.

Troubleshooting Approach:

A clear troubleshooting guide will be documented for the admin team. It will cover:

- How to check error messages in Flows, Process Builder, and Apex logs.
- Common issues (e.g., validation errors, record save failures) and quick resolutions.
- Escalation steps if issues require technical support or deeper investigation.

Testing Approach:

- **Unit Testing:** Each flow, validation rule, and automation was tested individually to ensure correct behavior.
- **Integration Testing:** Scenarios involving multiple components (e.g., order processing triggering loyalty updates) were tested to confirm smooth interaction.
- **User Acceptance Testing (UAT):** End users from different teams (Sales, Warehouse, Customer Service) tested the system to validate real business workflows.

Conclusion

The CRM project has provided HandsMen Threads with a centralized, automated, and secure platform to manage customer relationships and business operations more effectively. By streamlining workflows, improving data accuracy, and automating key processes, the organization is now equipped to serve customers faster and make smarter

business decisions. The deployment strategy, testing, and documentation ensure that the system is stable, maintainable, and ready for future enhancements, laying a strong foundation for continued growth and innovation.