

Salesforce CRM Project Documentation

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

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Project Overview

HandsMen Threads is a CRM system made for a men's fashion business. It helps manage customers, orders, products, and payments. With this system, the staff can track orders, manage inventory, and send notifications easily. It also helps the business see sales trends and understand what customers like. The CRM makes work faster, organized, and more efficient for everyone.

Objectives

The main goal of this CRM is to make the business run smoothly and help the staff manage customers better. Specifically, it:

- Keeps all customer information in one place.
- Automates tasks like order follow-ups and notifications.
- Shows reports about sales, products, and customer behavior.
- Makes sure only the right people can access certain information.
- Can be improved later with features like AI recommendations or chatbots.

Phase 1: Requirement Analysis & Planning

Understanding Business Needs:

- Customers want a smooth and personalized shopping experience.
- Staff need a simple system to manage orders, products, and customer info.
- Managers want reports to make better business decisions.

Project Scope and Goals:

- Create a CRM to manage customers, orders, products, and payments.
- Automate notifications, follow-ups, and approval processes.
- Provide reports and dashboards for easy tracking of sales and inventory.

Data and Security Design:

- Custom objects: Customer, Product, Order, Payment, Feedback.
- Standard objects: Account, Contact, Opportunity.
- Security: Roles, Profiles, Permission Sets, and Field-Level Security.

Stakeholders:

- Admin: Can access everything for setup and maintenance.
- Sales Staff: Can create orders and manage customer info.
- Managers: Can view reports and approve orders.
- Customers: Info is managed indirectly through orders and feedback.

Execution Roadmap:

1. Gather requirements and approve plan.
2. Build backend and setup objects.
3. Customize user interface and pages.
4. Migrate data and test.
5. Deploy and train users.

Phase 2: Salesforce Development – Backend & Configurations

Setup:

- Used Salesforce Developer Org for development and testing.
- Will deploy using Change Sets.

Customizations:

- Created custom objects for Orders, Products, Payments, and Feedback.
- Added validation rules to make sure data is correct.
- Automated tasks:
 - Flows to create follow-up tasks automatically.
 - Approval process for big orders.
 - Workflow to notify staff of new customers.

Apex Development

- Trigger to update product inventory after an order.
- Batch job to generate weekly sales reports.

Phase 3: UI/UX Development & Customization

Lightning App Setup:

- Created a custom app called HandsMen Threads CRM.

Page Layouts & Forms:

- Customer page shows personal info, order history, and feedback.
- Order page shows product details, status, and payment info.

User Management:

- Profiles: Admin, Sales Staff, Manager.
- Permission sets for specific access.

Reports & Dashboards:

- Report on sales by product.
- Dashboard to see customer orders.
- Report for monthly revenue and top-selling items.

Phase 4: Data Migration, Testing & Security

Data Loading:

- Used Data Import Wizard to upload customer and product info.
- Duplicate rules prevent repeated entries.

Security:

- Roles and hierarchy to control who sees what.
- Field-level security for sensitive data like payments.

Testing:

- Tested creating orders, workflows, approval processes, and tasks.
- Checked logs for any errors in Apex triggers or flows.

Phase 5: Deployment, Documentation & Maintenance

Deployment:

- Used Change Sets to move the project to Production.
- Backups made before deployment.

Maintenance:

- Monitor workflows and automated tasks regularly.
- Check logs for errors.
- Monthly check for data quality.

Troubleshooting:

- Use debug logs for Apex triggers.
- Check flow error notifications.
- Use reports to find missing or duplicate data.

Conclusion

The HandsMen Threads CRM helps the business manage customers, orders, and products better. It saves time, keeps data safe, and gives reports to make decisions easier. The system is ready for future improvements like AI suggestions or chatbots. This project shows how Salesforce can help a men's fashion business run better and more organized.

Future Enhancements

- Add AI for product suggestions.
- Customer portal for order tracking and feedback.
- Chatbot for quick customer support.
- More detailed analytics for trends and sales predictions.