

Salesforce CRM Automation Project Report

Abstract

HandsMen Threads, a forward-thinking player in the fashion industry, launched a Salesforce CRM project aimed at streamlining business data management and enhancing customer engagement. This initiative focused on building a scalable data model, implementing intelligent automation, and improving user experience through intuitive interfaces and consistent data integrity.

Introduction

Efficient data management and personalized customer service are critical for success in the competitive fashion industry. HandsMen Threads identified Salesforce as the ideal platform to centralize their operations, automate key workflows, and improve decision-making. The project revolved around modeling business data, ensuring data quality, and deploying intelligent automation for customer and operational interactions.

Use Case

The main use case was to implement a centralized Salesforce solution for managing customer orders, stock inventory, and loyalty programs while ensuring seamless information flow and data accuracy across departments.

User Stories

- As a customer, I want to receive an order confirmation email immediately after I place an order so that I'm assured my order is successful.
- As a warehouse team member, I want to receive an alert when stock goes below 5 units so that I can restock in time.
- As a marketing manager, I want customer loyalty status to auto-update based on purchase history so that I can offer personalized rewards.
- As a finance officer, I want bulk order data to be updated daily at midnight so that inventory and financial records stay accurate.

Project Phases

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Phase 1: Architecture & Planning

- Designed custom objects and fields.
- Defined relationships (lookups/master-detail), validation rules, formula fields.
- Planned automation using Flows and Apex Triggers.
- Outlined batch job schedules.
- Created reusable email templates.

Phase 2: Development

- Implemented custom objects and schema.
- Created record-triggered Flows for automating confirmations and alerts.
- Developed Apex Triggers for loyalty logic.
- Used Batch Apex for bulk order processing.
- Set up org-wide defaults, role hierarchy, and sharing rules.

Phase 3: Testing & QA

- Performed unit testing on Flows, Apex logic, and validation rules.
- End-to-end scenario testing with mock data.
- Validated email delivery and accuracy.
- Checked sharing rules and field-level security for compliance.

Phase 4: Deployment & Training

- Deployed to production with change sets.
- Conducted training sessions for end-users.
- Provided documentation and conducted Q&A sessions post-go-live.

Key Features Implemented

- Data Modeling: Created entities such as Order, Customer, Loyalty Status, Inventory.
- Automations:
 - Order Confirmation Emails (Flow)
 - Loyalty Tier Updates (Apex Trigger)

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- Stock Alert Emails (Flow)
- Batch Order Processing (Batch Apex - Scheduled)
- UI Enhancements:
 - Custom Lightning App
 - Simplified navigation using Lightning App Builder
- Data Quality Controls:
 - Validation Rules
 - Formula Fields
 - Required Field Settings

Tools & Technologies Used

- Salesforce Lightning Platform
- Lightning App Builder
- Flow Builder (Record-Triggered Flows)
- Apex Triggers
- Batch Apex & Schedulable Apex
- Validation Rules & Formula Fields
- Email Templates
- Salesforce Object Model & ERD Design

Challenges Faced

- Handling large order volumes in batch processing required optimization of batch size and execution logic.
- Designing reusable and dynamic email templates with merge fields.
- Coordinating automated processes to avoid race conditions and duplicate updates.

Outcome

The Salesforce solution significantly improved operational efficiency at HandsMen Threads. Order confirmations and stock alerts enhanced customer satisfaction and warehouse readiness, while automated loyalty updates improved customer retention. With accurate, centralized data and automation, the business

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now has stronger analytics capabilities and smoother workflows.

Deliverables

- Solution Design Document with:
 - Entity Relationship Diagram (ERD)
 - Field List & Object Model
 - Automation Strategy (Flow charts & Trigger logic)
- User Training Guide
- Post-Deployment Support Plan