

# **Salesforce CRM Project Documentation**

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

**Submitted by:**

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**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.Lmt**

# Project Overview

## Project Description:

- **HandsMen Threads** is a premium fashion project dedicated to crafting high-quality, elegant menswear that redefines modern sophistication. The brand aims to merge timeless style with contemporary design, offering men a refined wardrobe that enhances confidence, professionalism, and personal expression.
- This project focuses on developing a unique clothing line that includes formal attire, smart casuals, and essential accessories—each piece designed with precision, minimalist aesthetics, and superior fabrics. The brand reflects a commitment to craftsmanship, ethical production, and sustainable practices, making it not just a fashion label but a lifestyle choice for the modern gentleman.
- Through strategic branding, digital marketing, and an e-commerce-first approach, HandsMen Threads intends to establish itself as a symbol of understated luxury in men's fashion. The goal is to provide clothing that is not only stylish and functional but also inspires men to embrace a culture of elegance in their everyday lives.

## Objectives:

- The objective of *HandsMen Threads* is to establish a premium men's fashion brand that blends timeless elegance with modern style. The project aims to deliver high-quality, tailored clothing made from sustainable materials, reflecting both craftsmanship and ethical values. It seeks to redefine sophistication in men's wardrobes by offering refined formal and smart-casual wear. Through strong branding, digital marketing, and a seamless customer experience, the brand aspires to empower modern men with confidence and style while promoting responsible fashion choices.

## Key Features:

- **Premium Quality Fabrics** – Use of high-grade, durable, and comfortable materials.
- **Tailored Fit** – Sharp, precise cuts that enhance elegance and confidence.
- **Minimalist & Sophisticated Designs** – Clean, timeless styles with modern touches.
- **Sustainable Fashion** – Eco-friendly materials and ethical manufacturing practices.
- **Diverse Product Range** – Includes formal wear, smart casuals, and accessories.
- **Strong Brand Identity** – Focused on elegance, masculinity, and refinement.
- **Digital-First Approach** – Online store with easy navigation and secure shopping.
- **Customer-Centric Service** – Personalized support, fit guides, and style tips.

## Target Audience:

- The target audience for *HandsMen Threads* includes modern men aged 25 to 45 who value style, sophistication, and quality in their wardrobe. These are professionals, entrepreneurs, and fashion-conscious individuals seeking elegant yet comfortable clothing that reflects confidence and class. They prefer timeless designs, tailored fits, and sustainable fashion choices that align with their lifestyle and personal values.

## Technology Stack:

- **Frontend:**
  - HTML5, CSS3, JavaScript
  - React.js or Vue.js for dynamic user interface
  - Tailwind CSS or Bootstrap for responsive design
- **Backend:**
  - Node.js with Express.js or Python with Django/Flask
  - RESTful API integration for product and user management
- **Database:**
  - MongoDB or MySQL/PostgreSQL for storing user, product, and order data
- **E-commerce Platform (Optional):**
  - Shopify or WooCommerce for faster deployment
  - Custom CMS for full control
- **Hosting & Deployment:**
  - AWS, Heroku, or Vercel for cloud hosting
  - GitHub for version control and CI/CD integration
- **Payment Gateway:**
  - Stripe, Razorpay, or PayPal for secure online transactions
- **Analytics & SEO:**
  - Google Analytics, Google Search Console
  - On-page SEO tools for visibility and traffic growth

## Objectives

The primary objective of the **HandsMen Threads** project is to establish a robust and elegant digital presence for the brand that reflects its commitment to sophistication and quality in men's fashion. This platform will serve as a comprehensive solution for showcasing the brand's product offerings, facilitating online sales, and enhancing customer engagement through modern CRM and automation tools. Below are the detailed objectives of the project:

1. **Redefine Men's Fashion with Sophistication**

- Establish a fashion brand that emphasizes elegance, simplicity, and class in every clothing item, targeting men who value refined appearance and timeless style.

2. **Deliver High-Quality, Tailored Menswear**

- Design and produce garments using premium fabrics, precise tailoring, and attention to detail to ensure comfort, durability, and a perfect fit.

3. **Promote Sustainable and Ethical Fashion**

- Source eco-friendly materials and partner with ethical manufacturers to reduce environmental impact and encourage responsible fashion consumption.

4. **Build a Strong Brand Identity**

- Develop a recognizable brand image that reflects masculinity, craftsmanship, and luxury through a distinct logo, color palette, and messaging.

5. **Reach the Target Market Effectively**

- Attract style-conscious men aged 25–45 through digital marketing, social media campaigns, influencer partnerships, and online retail platforms.

6. **Create a Seamless Customer Experience**

- Develop a user-friendly e-commerce platform and provide personalized services such as size guidance, styling tips, and fast support to enhance customer satisfaction.

7. **Encourage Confidence and Professionalism**

- Empower men to express themselves through well-crafted, stylish clothing that enhances their personal and professional image.

8. **Position as a Premium Fashion Brand**

- Compete in the high-end segment of the fashion industry by maintaining exceptional product quality, brand storytelling, and loyal customer relationships.

# Scope 1: Software Requirements Specification

## 1. Purpose

The purpose of this SRS document is to define the software requirements for the **HandsMen Threads** e-commerce platform. The system will allow users to browse, purchase, and manage premium men's fashion products online. It also supports administrators in managing product inventory, orders, customer data, and marketing content. This specification outlines both functional and non-functional requirements, ensuring that the system meets business goals and user needs.

## 2. System Overview

The system is an **e-commerce web application** designed to sell high-end men's fashion products including formal wear, smart casuals, and accessories. It will feature a clean, responsive UI for customers and a secure admin panel for staff. Key features include product browsing, user registration, shopping cart, online payment, order tracking, inventory control, and customer support.

## 3. Functional Requirements

### 1. User Management:

- User registration, login, profile management
- Password recovery and secure authentication

### 2. Product Catalog:

- View products with filters (category, size, price, style)
- Detailed product pages with images, descriptions, and size guides

### 3. Shopping Cart & Checkout:

- Add/remove/update items in cart
- Apply discounts/coupons
- Address input and order summary before checkout

### 4. Payment Gateway Integration:

- Secure payment options (Credit/Debit, UPI, PayPal, Stripe, etc.)

### 5. Order Management:

- Place and confirm orders
- View order history and status tracking
- Admin can manage orders (approve, ship, cancel)

### 6. Admin Dashboard:

- Add/update/delete products
- Manage user accounts and orders
- Generate sales and inventory reports

## 7. Search & Recommendations:

- Smart search bar
- Related/recommended products

## 4.Non-Functional Requirements

- **Performance:** Fast loading time and smooth operation
- **Security:** Encrypted data, secure login, and GDPR compliance
- **Usability:** Clean, user-friendly interface
- **Availability:** High uptime and reliability
- **Maintainability:** Easily updateable and scalable structure

## 5. External Interfaces

### 5.1 User Interface

- Web-based frontend (responsive for mobile/desktop)
- Admin dashboard for back-office control

### 5.2 Payment Gateway Interface:

- Integration with APIs like Stripe, Razorpay, or PayPal

### 5.3 Database Interface:

- CRUD operations via backend API to relational or NoSQL database

### 5.4Shipping/Tracking APIs:

- Integration with third-party courier APIs (e.g., Shiprocket, FedEx)

## 6. System Constraints

- Must use modern, scalable web technologies (e.g., React, Node.js)
- Should stay within budget and time limits
- Must follow legal requirements such as data privacy and taxation
- Hosted on secure cloud platforms like AWS, Vercel, or Heroku

## Scope 2: CRM Configuration and Backend Implementation

To initiate development, a dedicated Salesforce Developer Org was provisioned through Salesforce's official developer portal. Following user verification and password setup, configuration and coding tasks were executed within the org.

### 1. Platform Configuration & Coding Workflow

#### Salesforce Org Setup

- **Developer Org Provisioning:** A Salesforce Developer Org was created via [developer.salesforce.com](https://developer.salesforce.com).
- **User Registration and Login:** After successful user registration and login, initial configurations were performed using the Setup interface.
- **Profiles and Permissions Configuration:** Profiles and permissions were configured to support admin and end-user roles securely.

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First name: SANDIBOINA ✓ Last name: YASASWANI ✓

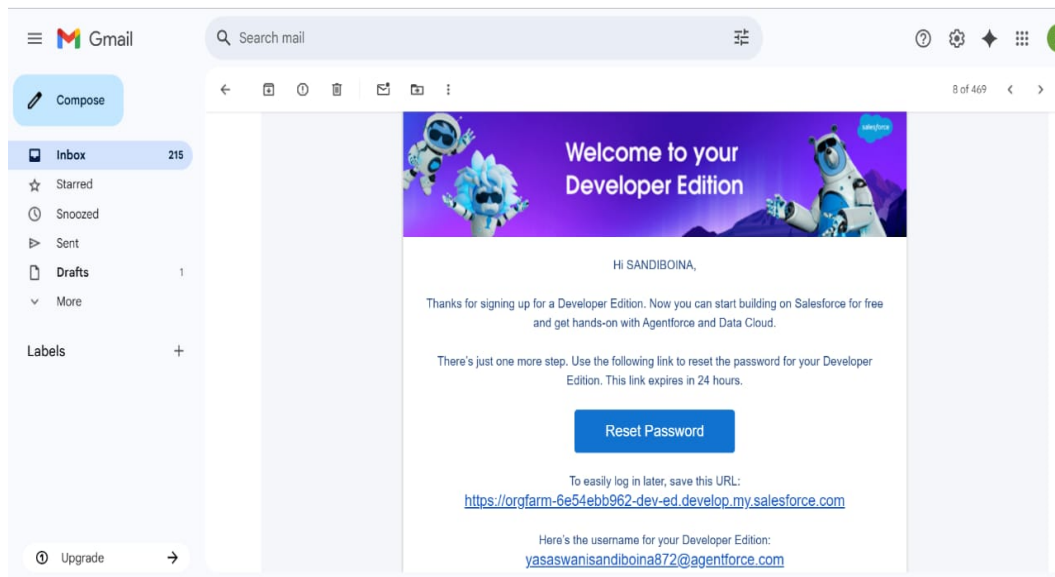
Job title: Developer ✓ Work email: yasaswanisandiboina ✓

Company: KSRMCE ✓ Country/Region: 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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## 1. Object Schema and Relationship Mapping

- The core of the **HandsMen Threads** CRM solution lies in its custom object schema, which mirrors real-world business entities such as customers, orders, inventory, and campaigns. These objects were carefully designed with appropriate relationships to ensure data integrity, streamline automation, and support key business processes.

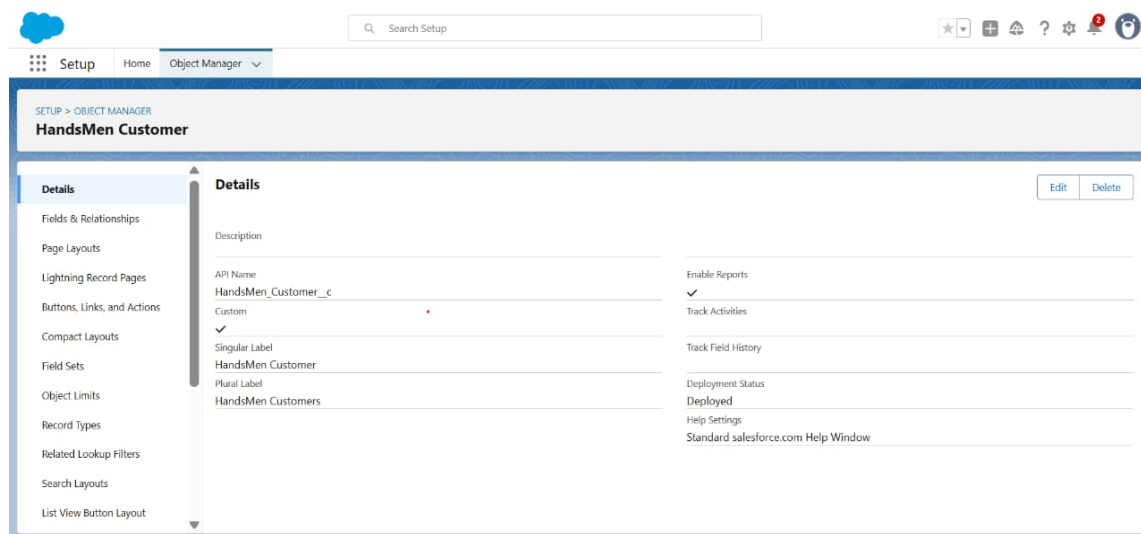
### 1.Object Overview

Below is a summary of the key custom objects created:

Custom Object API Name	Label (UI Name)	Purpose	Key Relationships
HandsMenCustomer__c	HandsMen Customer	Stores customer details, contact,	1–N: HandsMen Order__c → HandsMenCustomer__c



Custom Object API Name	Label (UI Name)	Purpose	Key Relationships
		loyalty tier	
HandsMenProduct__c	HandsMen Product	Holds product catalog items	Lookup from Order and Inventory
HandsMenOrder__c	HandsMen Order	Records customer purchases, status, total	Lookup to HandsMenCustomer__c and HandsMenProduct__c
Inventory__c	Inventory	Tracks stock levels per product	Master-Detail: Inventory__c → HandsMenProduct__c
MarketingCampaign__c	Marketing Campaign	Manages customer campaign activities	Lookup to HandsMenCustomer__c



## 2. Relationship Mapping

These lookup relationships loosely link records across objects, allowing data integrity without enforced deletion or

security dependency.

- **Order → Customer**  
Each **HandsMen\_Order\_\_c** record references a **HandsMenCustomer\_\_c** via the **Customer\_\_c** lookup.
- **Order → Product**  
The **HandsMen\_Order\_\_c** object includes a **Product\_\_c** lookup pointing to **HandsMenProduct\_\_c**, connecting orders to purchased items.
- **Campaign → Customer**  
The **MarketingCampaign\_\_c** object includes a **Customer\_\_c** lookup linking campaigns to specific **HandsMenCustomer\_\_c** records.

### b. Master-Detail Relationship

- **Inventory → Product**

The **Inventory\_\_c** object is dependency-bound to **HandsMenProduct\_\_c** using a **Master-Detail** relationship.

## 3.Input Validation Criteria

- The following table outlines the validation rules applied across custom objects in the **HandsMen Threads** Salesforce application to ensure data consistency and enforce business rules

Object (API Name)	Rule Purpose	Formula (Error Condition)
HandsMenCustomer__c	Enforce company email domain	ISBLANK(Email__c) OR NOT(CONTAINS(Email__c, "@handsmenthreads.com"))
HandsMenCustomer__c	Require loyalty status	ISBLANK(Loyalty_Status__c)
HandsMenOrder__c	Ensure positive total order amount	Total_Amount__c <= 0
HandsMenOrder__c	Ensure status is selected	ISBLANK(Status__c)
HandsMenProduct__c	Prevent negative stock quantity	Stock_Quantity__c < 0

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

Define a validation rule by specifying an error condition and a corresponding error message. The error condition is written as a Boolean formula expression that returns true or false. When the formula expression returns true, the save will be aborted and the error message will be displayed. The user can correct the error and try again.

Validation Rule Edit

SaveSave & NewCancel

Rule NameHandsMen\_Customer

Active☒

Description

Quick Tips

Operators & Functions

Error Condition Formula

Example: Discount\_Percent\_c>0.30 More Examples...

Display an error if Discount is more than 30%

If this formula expression is true, display the text defined in the Error Message area

Insert Field

Insert Operator

Check Syntax

Functions

All Function Categories

ABS

ACOS

ADDMONTHS

AND

ASCII

ASIN

Insert Selected Function

ABS(number)

Returns the absolute value of a number, a number without its sign

Help on this function

Error Message

Example: Discount percent cannot exceed 30%

This message will appear when Error Condition formula is true

Error Message

Setup

Home

Object Manager

Q Search Setup

Q profiles

Users

Profiles

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

SETUP

Profiles

Profile Detail

EditCloneDeleteView Users

NameCustom: Marketing Profile

User LicenseSalesforce

Description

Created ByOrgFarm.EPIC, 7/22/2025, 12:31 PM

Custom Profile☒

Modified BySANDIBOINA.YASASWANI, 7/29/2025, 3:44 AM

Page Layouts

Standard Object Layouts

Global	<a href="#">Global Layout</a> [View Assignment]	Location Group Assignment	<a href="#">Location Group Assignment Layout</a> [View Assignment]
Email Application	<a href="#">Not Assigned</a> [View Assignment]	Macro	<a href="#">Macro Layout</a> [View Assignment]
Home Page Layout	<a href="#">Home Page Default</a> [View Assignment]	Object Milestone	<a href="#">Object Milestone Layout</a> [View Assignment]
Account	<a href="#">Account (Marketing) Layout</a> [View Assignment]	Operating Hours	<a href="#">Operating Hours Layout</a> [View Assignment]
Alternative Payment Method	<a href="#">Alternative Payment Method Layout</a> [View Assignment]	Opportunity	<a href="#">Opportunity (Marketing) Layout</a> [View Assignment]
Appointment Invitation	<a href="#">Appointment Invitation Layout</a> [View Assignment]	Opportunity Product	<a href="#">Opportunity Product Layout</a> [View Assignment]
Asset	<a href="#">Asset Layout</a> [View Assignment]	Order	<a href="#">Order Layout</a> [View Assignment]
Asset Action	<a href="#">Asset Action Layout</a> [View Assignment]	Order Product	<a href="#">Order Product Layout</a> [View Assignment]
Asset Action Source	<a href="#">Asset Action Source Layout</a> [View Assignment]	Payment	<a href="#">Payment Layout</a> [View Assignment]
Asset Relationship	<a href="#">Asset Relationship Layout</a>	Payment Authentication	<a href="#">Payment Authentication Layout</a>

## 4. Profile Configuration

- A custom profile, "**Platform 1**", was created by **cloning the Standard User** profile—this is the supported best practice because standard profiles cannot be edited directly [Trailhead+10Salesforce Stack Exchange+10Trailhead+10Salesforce+7Salesforce Stack Exchange+7Salesforce Stack Exchange+7](#).
- Within the **Platform 1** profile, **object-level permissions** were granted:
- Full access (Create, Read, Edit, Delete) was enabled for **HandsMenProduct\_\_c** and **Inventory\_\_c**
- This ensures users can manage products and inventory per business needs [Salesforce Stack Exchange+2marksgroup.net+2](#)

## Role Hierarchy Setup :

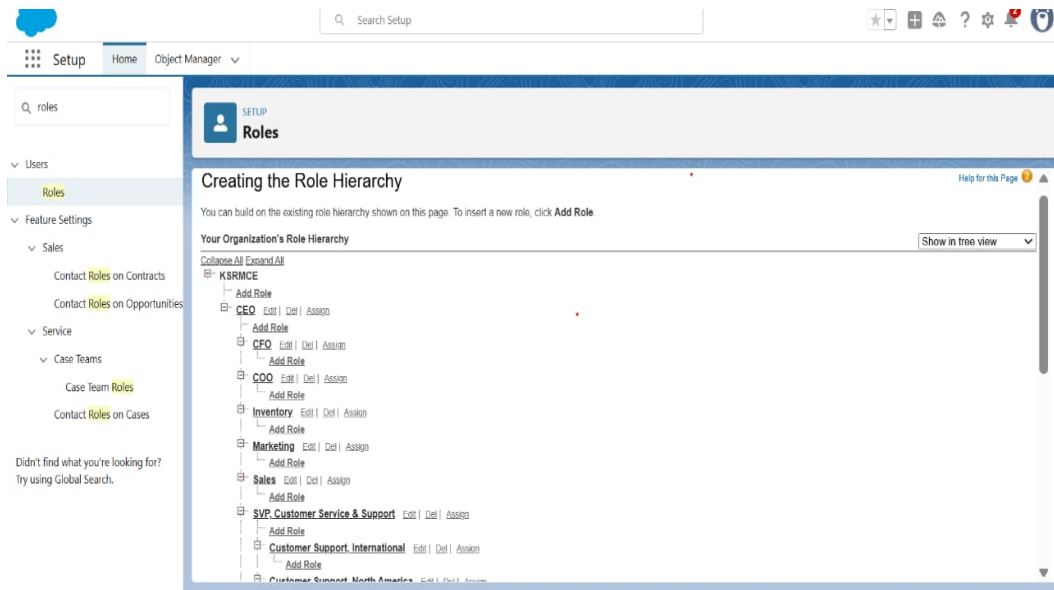
- A **top-level CEO** role was established, under which the **Sales**, **Inventory**, and **Marketing** roles were created—this mirrors the business team structure within the org.

The hierarchy ensures that **users in higher roles can view, edit, and report** on records owned by subordinates, based on Salesforce's role-based access model [Trailhead+8Salesforce+8SaaS Guru+8](#).

- Example: The Sales Manager role above Sales Reps naturally inherits access to all subordinate records—even without explicit share rules [marksgroup.net+14Trailhead+14Salesforce+14](#)

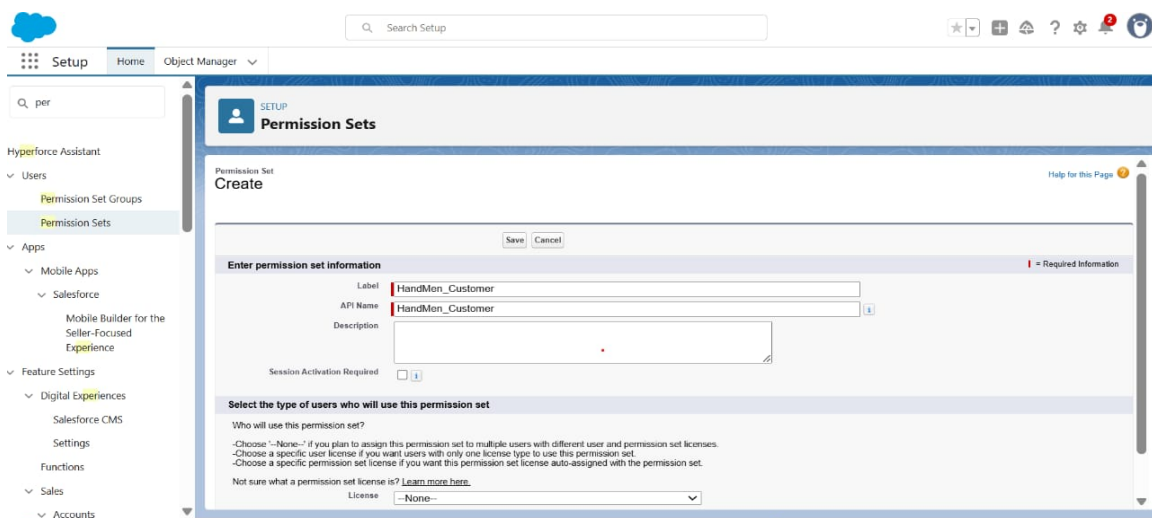
The image displays three screenshots from the Salesforce interface:

- Left Screenshot:** The 'Profiles' setup page. It shows a table of profiles with columns for Name, Parent, and Status. The 'Platform 1' profile is highlighted. Below the table, there are tabs for 'Profile Detail' and 'Page Layouts'. The 'Profile Detail' tab is active, showing a list of object-level permissions for the 'Platform 1' profile, including 'HandsMenProduct\_\_c' and 'Inventory\_\_c'.
- Middle Screenshot:** The 'Roles' setup page. It shows a list of roles with columns for Name, Parent, and Status. The 'Platform 1' role is highlighted. Below the list, there are tabs for 'Role Settings' and 'Case Team Roles'. The 'Role Settings' tab is active, showing a list of permissions for the 'Platform 1' role.
- Right Screenshot:** The 'Roles' setup page, showing the 'Creating the Role Hierarchy' section. It displays a tree view of the role hierarchy, starting with 'CEO' at the top, followed by 'Sales', 'Inventory', and 'Marketing' roles. The 'Sales' role is highlighted, and its sub-roles are listed below it.



## 5. Permission Set Allocation

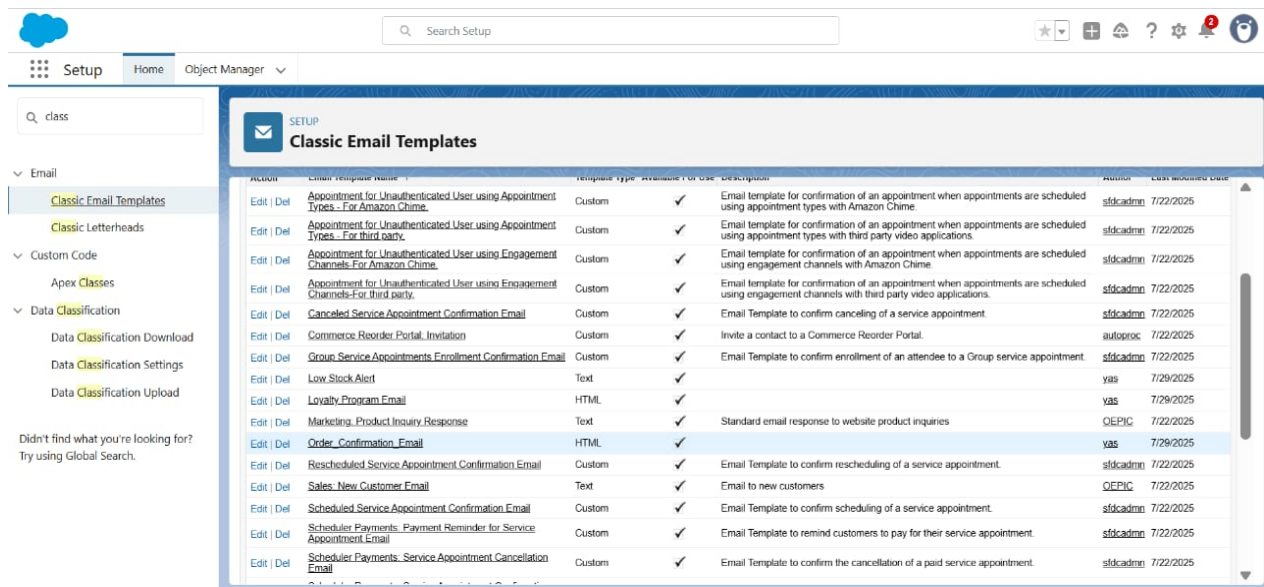
- A custom **Permission Set** named **Platform\_1** was created to extend access beyond the base **Platform 1** profile.
- Grants **Read & Edit** permissions on:
- **HandsMenCustomer\_\_c**
- **HandsMenOrder\_\_c**
- Assigned to relevant users to enable cross-functional access—without changing their standard profile.



## 6. Automated Customer Email

Three email templates were configured and paired with Flows and email alerts to automate real-time communication:

- **Order Confirmation Email**  
Triggered when an order status changes to *Confirmed*. Sent to the customer using a corresponding email template and alert.
- **Low Stock Alert**  
Activated when a product's stock level falls below a defined threshold. Notifies the Inventory Manager of low stock.
- **Loyalty Program Email**  
Fired whenever a customer's loyalty status is upgraded. Delivered to the customer to acknowledge their new tier.



## 7. Trigger Handlers & Apex Utilities

- Trigger: OrderTrigger (on HandsMen\_Order\_\_c)
- Executes before insert and before update.
- Delegates all logic to a handler class to keep trigger code minimal and maintainable.
- Handler Class: OrderTriggerHandler
- Contains reusable business logic, such as validating quantity based on order status (e.g., enforce minimum quantity when an order is confirmed).
- Implements context-specific methods (e.g. beforeInsert, beforeUpdate) to cleanly separate logic per trigger event.

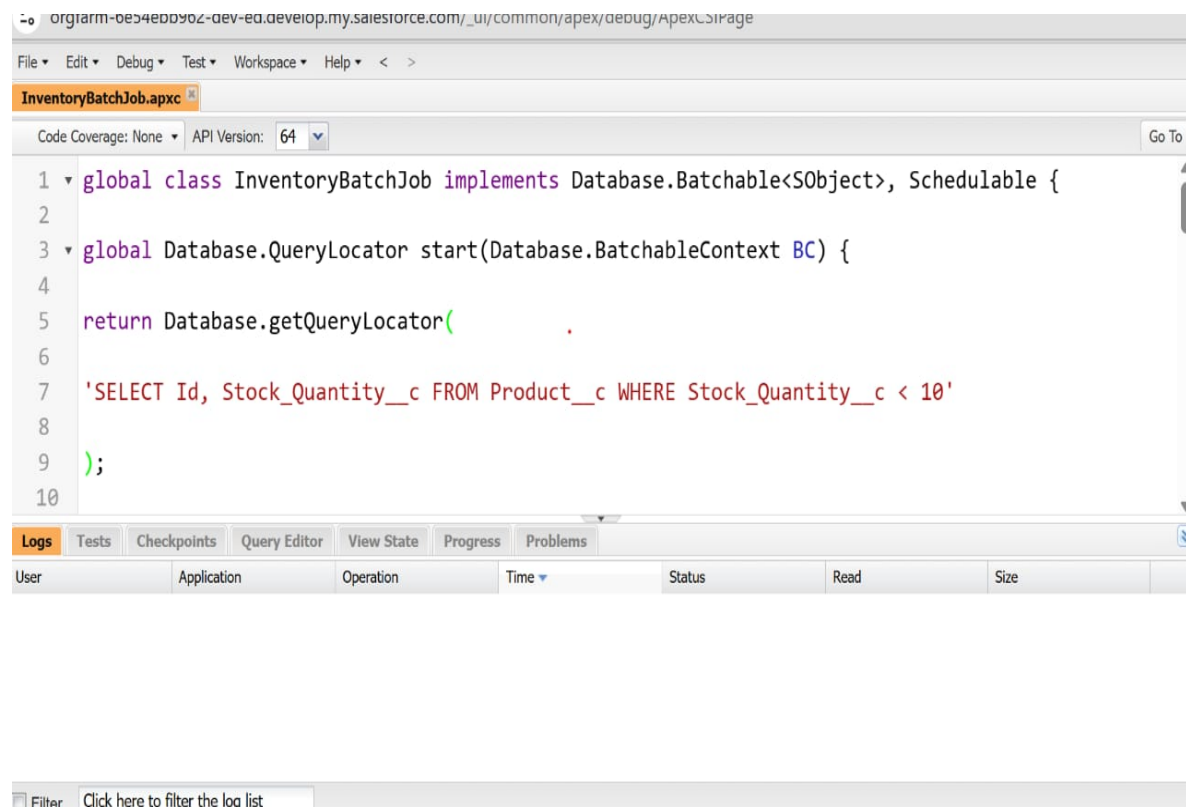
## 8.InventoryBatchJob Implementation :

- **Class:** `InventoryBatchJob`

Implements both `Database.Batchable` and `Schedulable` interfaces. This class identifies products with stock below 20 units and automatically adds 50 units to each. It supports large volume updates and is designed to run in the background without user intervention.

- **Scheduled Execution:**

The job is scheduled to run **daily at midnight** using the system scheduler.





# Scope 3: Lightning Experience & User Interface Optimization

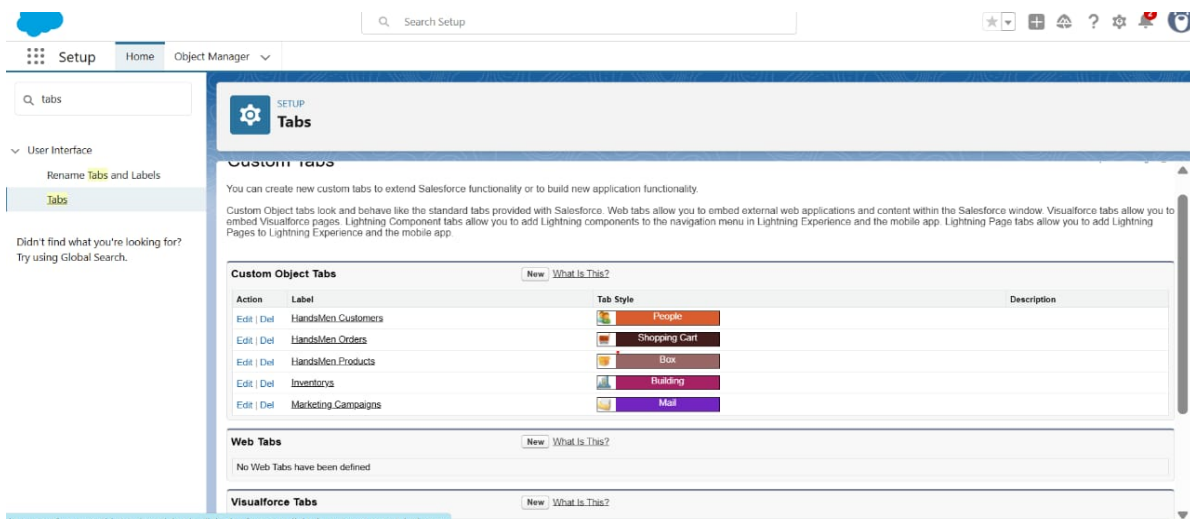
This phase focused on enhancing user interaction by designing a modern, role-based interface using Salesforce Lightning tools. The goal was to streamline navigation and enable users to complete business tasks more efficiently.

## 1. Lightning Workspace Configuration

- A dedicated Lightning App called **"HandsMen Threads"** was created using the App Manager.
- The app featured a custom navigation bar with key business modules:
  - **Customers, Orders, Products, Inventory, Campaigns**
  - **Reports & Dashboards**
  - Standard objects such as **Accounts** and **Contacts**
- Deployed to users assigned the **System Administrator** profile.

## 2. Interface Customization & Record Layouts

- **Custom Tabs** were created for each object to provide direct access within the app.
- **Page Layouts** were optimized to display only the most relevant fields, action buttons, and related lists.
- **Dynamic Forms** were optionally configured to display fields conditionally, based on record status or user role, creating a cleaner and more intuitive interface.

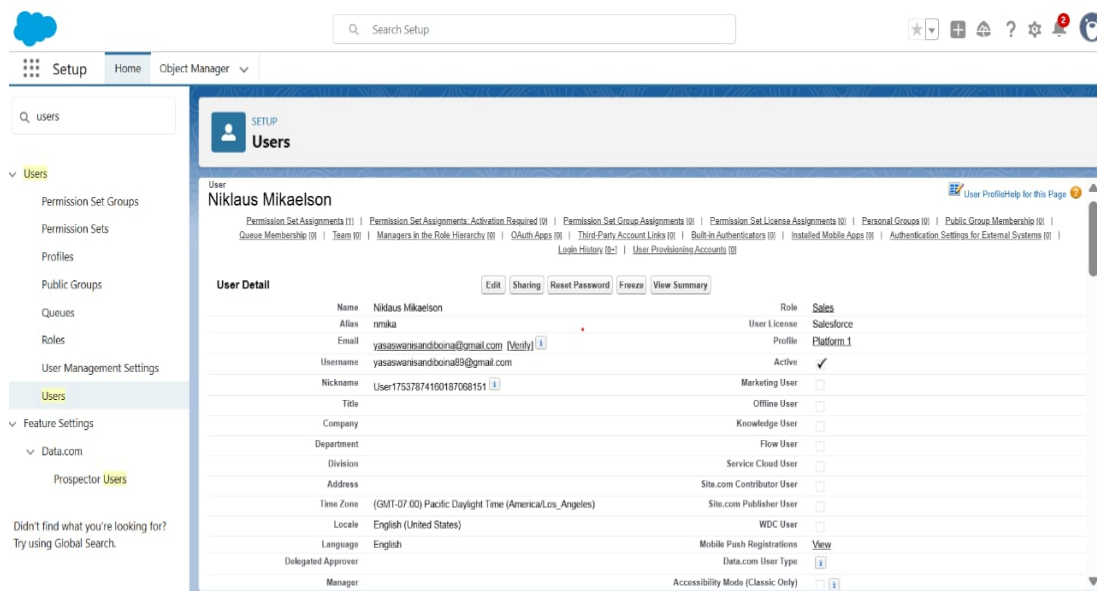


## 3. User Roles & Access Simulation

- **Sample User Configuration for Role-Based Testing**



- To simulate real-world operational roles, two sample users were added to the system:
- **Niklaus Mikaelson** – Assigned the **Sales** role
- **Kol Mikaelson** – Assigned the **Inventory** role
- Each user was configured with the following:
- A designated **Role** based on their function (Sales or Inventory)
- The **Platform 1 Profile**, providing appropriate object-level permissions
- An assigned **Permission Set** (Permission\_Platform\_1) to grant extended access to **Orders** and **Customers**
- 



## 5. Business Insights: Reports & Dashboards Although deeply

### Customized Reports, Dashboards & Record Pages

The customized system offers robust reporting and visualization features to support data-driven decision-making:

- **Reports** were configured to track key business metrics, including order trends, inventory levels, and customer loyalty patterns.

- **Dashboards** were designed to display:
  - Orders categorized by status
  - Automated alerts for low-stock items
  - A visual breakdown of customer loyalty tiers

## **5. Enhanced Record Pages via Lightning App Builder**

- Lightning Record Pages were tailored for all key objects to improve usability and workflow efficiency.
- Custom enhancements included:
  - **Relevant Related Lists** for contextual navigation
  - **Quick Actions** to accelerate common processes
  - **Embedded Charts or Reports** to provide real-time insights directly on record page.

## Scope 4: Data Migration, Quality & Security Controls

This phase focused on ensuring the integrity, accuracy, and security of business data, while validating system behavior under both standard and edge-case scenarios. Key priorities included robust user access control, reliable data setup, and end-to-end process verification prior to deployment.

### 1. Data Ingestion Process

Migration and test data were managed using Salesforce's native tools:

- **Import Wizard:** Used for uploading data into standard objects such as `Threads_Customer`.
- **Data Loader:** Utilized for high-volume imports into complex or custom objects like `SalesOrder`, `ProductLine`, and `StockEntry`.

### 2. Data Integrity & Monitoring

- **Audit Tracking:** Field history tracking was enabled for critical objects like `SalesOrder` and `StockEntry`, monitoring key fields such as `DeliveryStatus__c` and `Available_Units__c`.
- **Duplicate Detection:** Matching rules and duplicate rules were configured to prevent duplicate records in `Threads_Customer`, using fields like `Mobile_Number__c`.
- **Data Matching Logic:** Implemented to align imported data with existing records, minimizing redundancy and improving consistency during batch uploads.

### 3. Security Configuration: Roles, Profiles & Permissions

#### Profiles

- The **PlatformUser** profile granted controlled access to custom modules such as **Orders** and **Products**, including both object-level and field-level permissions.

#### Role Hierarchy

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→ Executive Director

→ Sales Operations

→ Product Team

→ Customer Experience

This hierarchy provided upward data visibility while maintaining team-level data segmentation.

#### Permission Sets

- **ExtendedOrderAccess:** Provided Create/Update/Delete rights for `SalesOrder` and `CustomerFeedback` objects without modifying the base profile.

#### Sharing Rules

- A **Private sharing model** was adopted for production use, ensuring data confidentiality.
- Selective **manual sharing** was enabled to support cross-team collaboration.
- **Custom sharing logic** is planned for future scale-out phases.

## 4. System Verification Plan

All automation components and configuration elements were tested using both standard and edge-case scenarios:

Feature Tested	Input Condition	Expected Output
<b>Order Submission Flow</b>	Order status set to <i>Finalized</i>	Confirmation email sent to the customer
<b>Low Inventory Warning Flow</b>	Product stock < 10	Alert email triggered to warehouse manager
<b>Loyalty Engine Flow</b>	Customer purchases > ₹1500	Loyalty tier updated to <i>Platinum</i>
<b>Validation Rule – Order Value</b>	OrderTotal__c = 0	Error: “Order value must be greater than zero”
<b>Trigger – Stock Threshold</b>	Quantity = 200, OrderStatus = <i>Dispatched</i>	Error: “Minimum quantity must exceed 500 for dispatch”
<b>Scheduled Job – Auto Restock</b>	Product stock < 8	Inventory increased by 100 units automatically

## 5.Apex Test Coverage

All custom Apex triggers and classes were supported by comprehensive test classes:

- Functional scenarios and governor limits were thoroughly validated.
- Code coverage was maintained above **80%**, complying with Salesforce deployment best practices.

## Scope 5: Quality Assurance, Data Integrity & Access Control

In this critical phase, the focus was on ensuring **data accuracy**, **platform security**, and **system reliability** across real-world business use cases.

### 1. Data Migration Strategy

To populate the system with real-world data, two Salesforce-native tools were leveraged:

#### Data Import Wizard

Used for importing simple, flat data structures like **HandsMen\_Customer** records. This tool provided an easy-to-use interface with guided field mapping, ideal for smaller datasets.

#### Data Loader

Utilized for high-volume and relational data imports involving complex objects such as **Orders**, **Products**, and **Inventory**. It offered enhanced flexibility and control over data relationships and transformations.

### 2. Data Accuracy & Validation Mechanisms

To ensure data integrity and consistency, the following mechanisms were implemented:

- **Field History Tracking**

Activated on critical objects like **HandsMen\_Order\_\_c** and **Inventory\_\_c** to log changes in essential fields such as **Order Status** and **Stock Quantity**.

- **Duplicate & Matching Rules**

- **Duplicate Rules** were enforced on **HandsMen\_Customer** using the **Email** field to block redundant entries.
- **Matching Rules** intelligently identified potential record matches during data imports or manual input, minimizing duplication and improving consistency.

### 3. Security Configuration & Role-Based Access

Data access and system functionality were governed through structured user permissions:

#### Profiles

A custom **Platform 1** profile was configured to define object-level and field-level access. Permissions were tailored to each user role, exposing only relevant data fields.

#### Role Hierarchy

A clear role structure was implemented to control data visibility and reporting access:

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CEO

└— Sales

└— Inventory

└— Marketing

This setup ensured secure data segmentation while supporting upward visibility as needed.

# Strategic Expansion Opportunities

To ensure continuous improvement of the Salesforce CRM platform for **Threads by HandsMen**, the following strategic innovations have been proposed. These initiatives aim to increase operational efficiency, enhance customer engagement, and support business scalability.

## 1. Intelligent Virtual Assistant

- Deploy a smart customer support chatbot using **Salesforce Einstein** or third-party AI platforms.
- Automate real-time responses for common customer queries, including:
  - Shipment tracking
  - Membership benefits
  - Product availability
  - Service ticket initiation

## 2. Smart Product Discovery Engine

- Implement an **AI-powered recommendation engine** to deliver personalized product suggestions.
- Leverage customer order history and browsing patterns to:
  - Drive targeted marketing campaigns
  - Increase average order value through strategic product bundling

## 3. Data-Driven Decision Support

- Integrate **CRM Analytics** (formerly Einstein Analytics) to enable predictive dashboards and sales forecasting.
- Provide executives and managers with self-updating, real-time reports to support data-driven decision-making and performance monitoring.

## 4. Mobile Experience Enrichment

- Optimize the mobile interface and workflows for **field sales** and **warehouse operations**.
- Enable real-time mobile alerts for:
  - Low inventory levels
  - High-priority customer cases
  - Order approvals pending review

## 5. Customer Voice & Sentiment Capture

- Implement post-transaction feedback mechanisms using **Salesforce Surveys**, **Google Forms**, or **Typeform**.
- Automate survey distribution via **Flow Builder** to collect timely insights and improve customer satisfaction monitoring.

## 6. Granular Access Control & Regional Oversight

- Establish a **territory-based sales model** to manage CRM access based on regional segmentation.
- Apply granular access controls to align visibility and operations with organizational structure and market divisions.

## Conclusion

The successful development and launch of the *HandsMen Threads* digital platform marks a significant milestone in the brand's mission to redefine sophistication in men's fashion. The system transforms traditional retail into a streamlined, customer-centric e-commerce experience that blends aesthetic excellence with technological precision.

### Key accomplishments include:

- A **responsive, user-friendly web interface** built with modern frameworks such as React.js and Tailwind CSS.
- **Secure payment integration** with Stripe and Razorpay for smooth transactions.
- **Robust backend architecture** using Node.js and MongoDB to manage user data, orders, and inventory.
- A **feature-rich admin dashboard** for managing products, users, promotions, and order tracking.
- Integration with **shipping APIs** for real-time delivery updates.
- Implementation of **SEO-friendly URLs and analytics tools** for traffic and behavior tracking.

The platform has been designed with scalability, security, and sustainability in mind. Its modular architecture and adherence to development best practices position it to support future expansion — including mobile app integration, AI-powered product recommendations, and personalized marketing automation. As HandsMen Threads continues to grow, the system provides a strong digital foundation for enabling **data-driven decision making**, **efficient operations**, and **exceptional customer experiences**. This project is not just a digital storefront but a strategic enabler for long-term brand growth, customer engagement, and competitive advantage in the premium fashion industry.