PHASE 4 – Process Automation

Automation for Orders, Inventory, Loyalty & Notifications

1. Introduction

Process automation is a defining pillar of the HandsMenThreads Salesforce CRM. It eliminates manual work, reduces human error, and accelerates operational speed. This phase focuses on converting real-world business procedures into automated workflows using Validation Rules, Flows, and Approvals. Each automation is optimized to maintain data integrity, improve user productivity, and enhance the customer experience.

HandsMenThreads relies heavily on quick order processing, accurate stock adjustments, and timely communication. Thus, automation ensures consistency and reliability at scale.

2. Validation Rules

Validation rules ensure incorrect or incomplete data does not enter the system.

a. Prevent Negative Stock

Ensures Stock__c never drops below zero.

Logic:
If a user attempts to set stock < 0, the rule prevents saving.

b. Customer Email Format Validation

Ensures proper email formatting to maintain communication reliability.

c. Order Quantity Validation

Prevents creating order items with zero or negative quantities.

These rules enhance data quality across the CRM.

3. Stock Management Flow

One of the most critical flows.

Purpose:

Automatically update product stock when an order item is created or updated.

How It Works:

1. Flow triggers on Order_Item__c creation.

2. It retrieves Product__c.Stock__c.

3. Deducts Quantity__c.

4. Updates Product__c.Stock__c.

5. If stock falls below Reorder_Level__c → send alert.

Alert Actions:

- Email Inventory Manager

- Post to Chatter group

- Add record to Low_Stock_Queue__c (optional for future enhancements)

This automation ensures real-time inventory accuracy.

4. Order Confirmation Flow

Triggered when an Order__c is created.

Actions:

- Sends order confirmation email

- Includes order summary, delivery expectations

- Notifies Sales Executive assigned to the order

This enhances customer engagement and professionalism.

5. Loyalty Points Automation (Flow + Apex)

While flows handle simple logic, Apex was required for advanced loyalty tier calculations.

Trigger Logic:

Runs after Order_Status__c = "Delivered".

Steps:

1. Pull Order_Total__c.

2. Multiply by configured points percentage (e.g., 5%).

3. Add to Customer__c.Loyalty_Points__c.

4. Determine new tier:

   o Silver: 500

   o Gold: 1000

   o Platinum: 2000

5. Update tier if threshold crossed.

This ensures customers are continuously rewarded.

6. Approval Process for High-Value Orders

Some orders involve premium categories such as suits or accessories.

Rules:

If Order_Total__c > 20,000 INR:

- Require approval from the Sales Manager.

This protects against fraudulent or mistaken entries.

7. Communication Automation

a. Low-Stock Alerts

Emails + Chatter posts are triggered.

b. Delivery Updates

Future integration with SMS API will notify customers of order progress.

c. Campaign Broadcasts

Marketing can run targeted flows to notify customers of new arrivals based on loyalty tier or purchase history.

8. Automation Testing

Each automation was tested in sandbox:

- Unit tests for triggers
- Flow debug mode for decision paths
- Realistic scenario testing for edge cases

This ensured stability and correctness.

Conclusion

Phase 4 transforms HandsMenThreads CRM into an intelligent retail engine. Automations ensure that stock updates, order processing, communication, and loyalty systems function without manual intervention. This significantly boosts operational efficiency and enhances the customer shopping experience.