

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

## Salesforce CRM Project Documentation

### Project Overview

**HandsMen Threads** is a premium men's fashion CRM built on Salesforce, designed to redefine the art of sophistication by connecting luxury fashion with smart customer relationship management. The system centralizes all critical business operations — from customer data and orders to inventory and marketing — into a single, cohesive platform.

By integrating automation, data tracking, and custom workflows, HandsMen Threads empowers the business to provide personalized service, manage inventory efficiently, and enhance customer loyalty through intelligent engagement strategies.

### Objectives

The core objective of HandsMen Threads CRM is to streamline operations across sales, customer service, and marketing for a modern luxury fashion brand. The system ensures seamless management of customer interactions, efficient order handling, proactive inventory monitoring, and targeted marketing campaigns.

This CRM aims to:

- Strengthen **customer relationships** through tailored communication and loyalty programs.
- Enable **real-time visibility** into sales and stock levels.
- Automate **key business workflows** to minimize manual tasks.
- Support **scalable growth** with data-driven decision-making.

Ultimately, the CRM adds business value by transforming manual processes into intelligent automation — ensuring the brand maintains both efficiency and elegance.

### Phase 1: Requirement Analysis & Planning

## Understanding Business Requirements

- The brand needed a unified CRM to manage customers, orders, and stock levels seamlessly.
- Manual tracking of inventory and customer data caused inefficiencies and inconsistencies.
- Marketing campaigns required a structured platform to reach target customers effectively.

## Defining Project Scope and Objectives

- Build a centralized Salesforce app, “**HandsMen Threads App (Central Control).**”
- Combine **standard** and **custom objects** for better data segregation.
- Automate workflows for email notifications and stock updates.
- Ensure user roles and permissions are aligned with department-level access.

## Design Data Model and Security Model

- **Data Model:**
  - Custom Objects:
    - **HandsMen Customer** – Stores all customer data.
    - **HandsMen Orders** – Manages product orders and transactions.
    - **Inventory** – Tracks product stock levels.
    - **Marketing Campaigns** – Handles promotional and brand events.
  - Standard Objects:
    - **Accounts, Contacts, Reports, Dashboards** for analytics and standard CRM functions.
- **Security Model:**
  - Role Hierarchy established for Admin, Sales, Marketing, and Warehouse teams.
  - Field-level security to protect sensitive customer and financial data.
  - Permission Sets for marketing campaign management and reporting access.

## Stakeholders Mapping

- **Admin:** Overall control of the Salesforce environment.
- **Sales Team:** Handles customer orders and inquiries.
- **Marketing Team:** Creates and tracks campaigns.
- **Inventory Manager:** Manages stock updates and restocking processes.
- **Customers:** End users interacting through automated communication.

## Execution Roadmap

1. Requirement gathering and data model design.
2. Object creation and field customization.
3. Automation and Apex development.
4. UI customization and user management.
5. Testing, data migration, and deployment.

## Phase 2: Salesforce Development – Backend & Configurations

### Setup Environment & DevOps Workflow

- Configured Salesforce Developer Org with change set-based migration.
- Established sandbox for testing before deployment.

### Customization of Objects and Automation

- **Custom Objects & Fields:** Created as per business requirements.
- **Validation Rules:** Ensured data accuracy — e.g., no negative stock values.

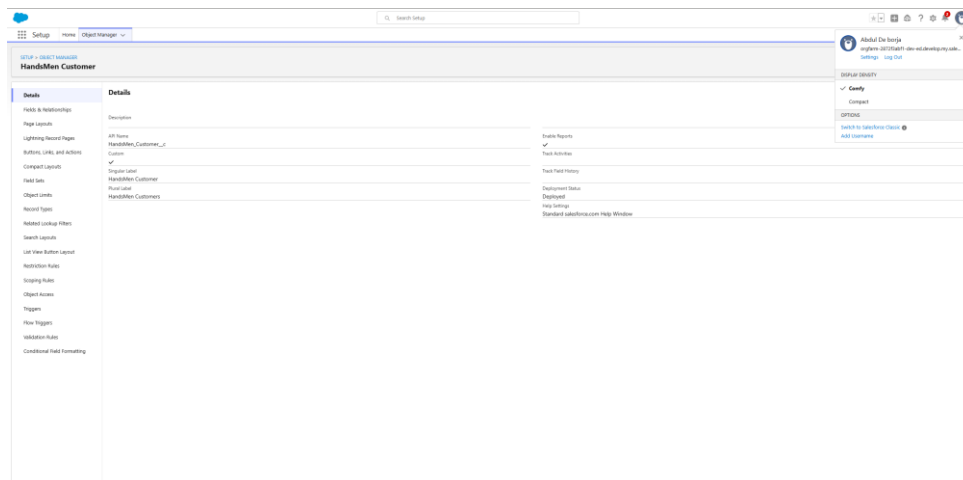


Image 1.1 HandsMen Customer Object

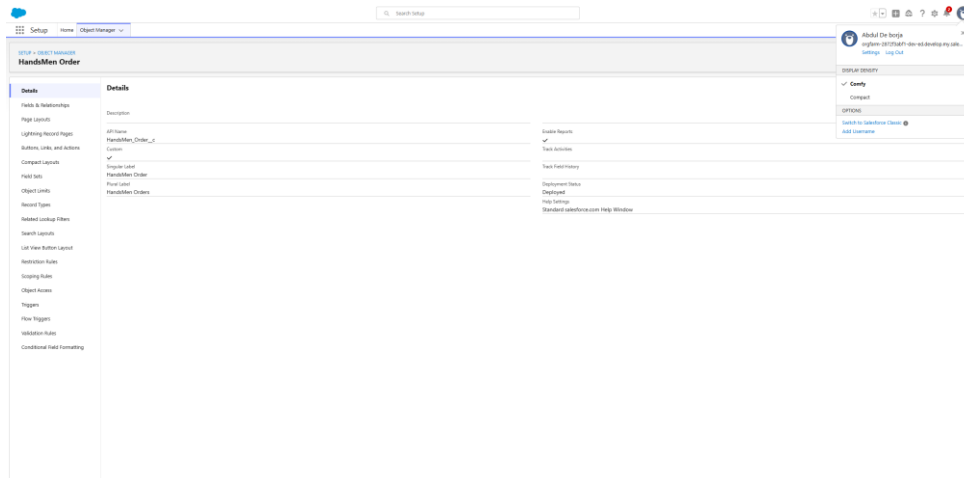


Image 1.2 HandsMen Order Object

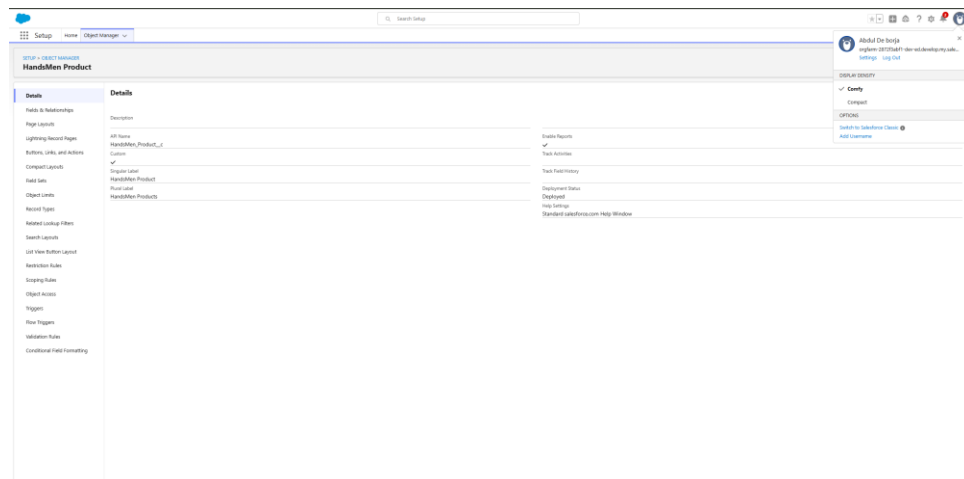


Image 1.3 HandsMen Product Object

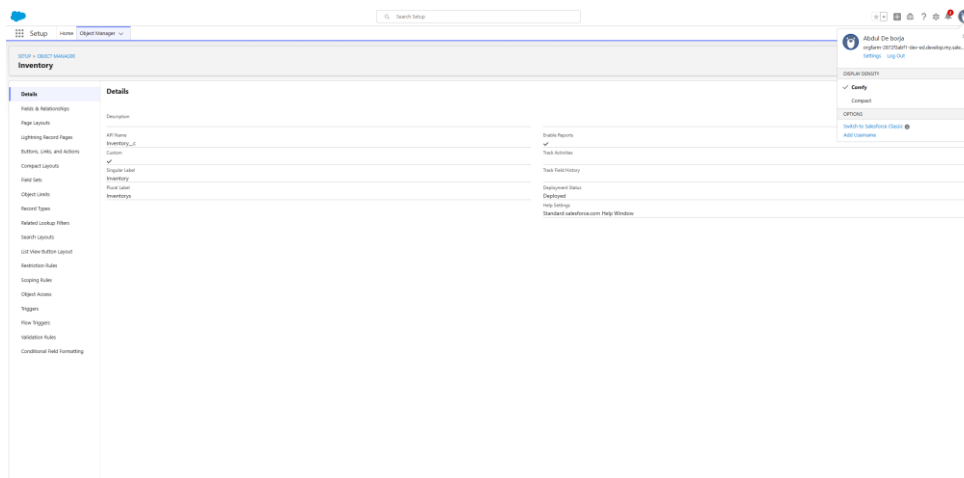


Image 1.4 Inventory Object

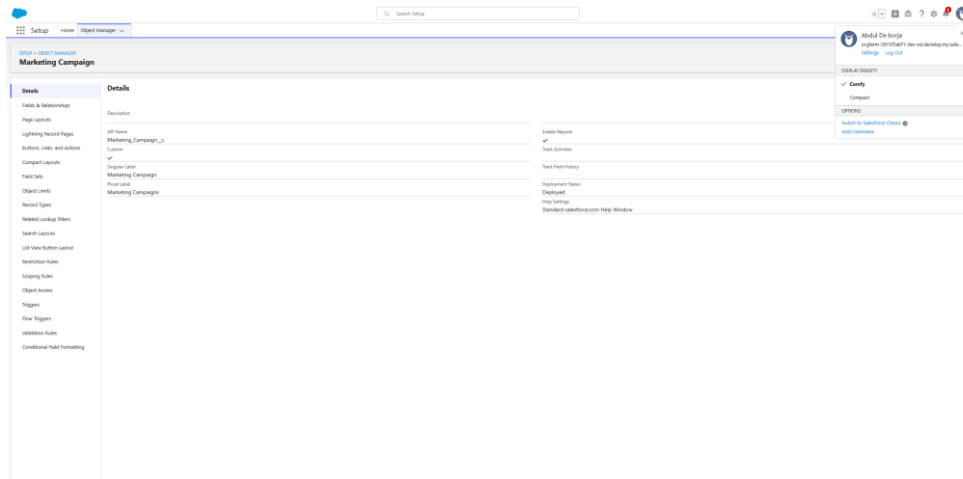


Image 1.4 Marketing Campaign Object

- **Automation Flows:**

- **Order Confirmation Flow** – Sends an automatic email to customers when an order is confirmed.

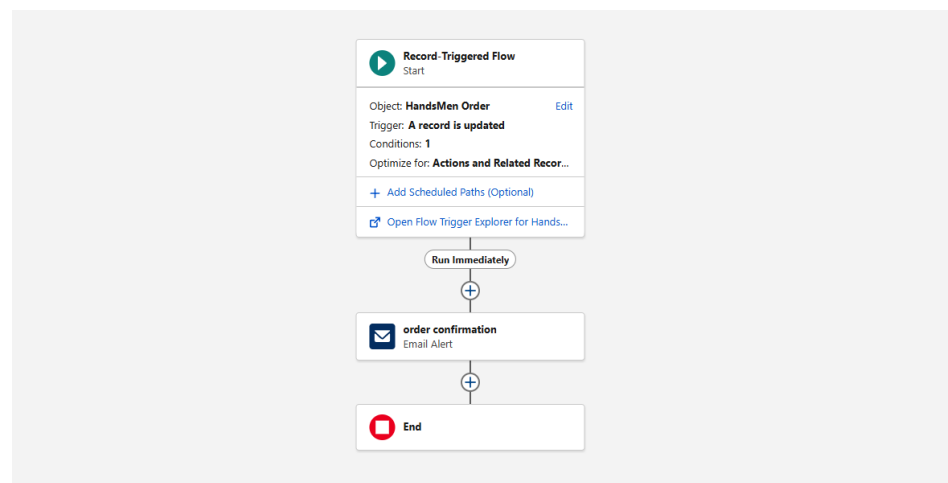


Image 2.1 Order Confirmation Flow

- **Low Stock Flow** – Notifies the inventory manager when stock drops below a defined threshold.

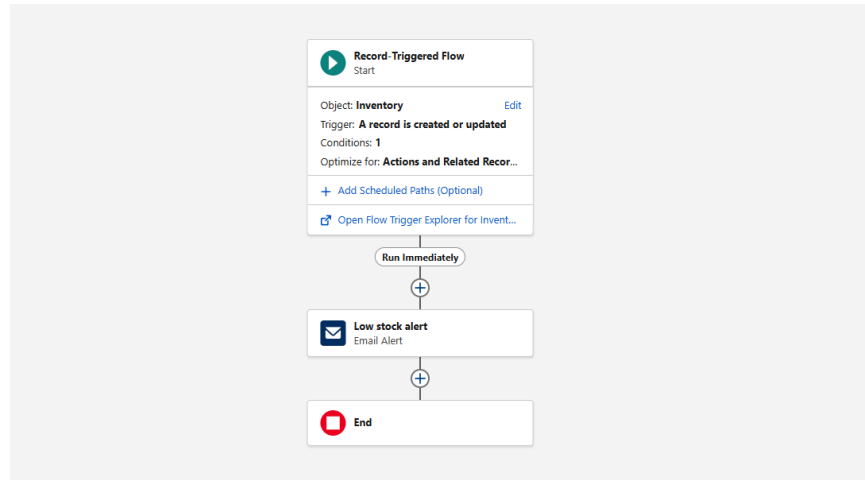


Image 2.2 Low Stock Flow

- **Loyalty Program Flow** – Sends reward emails to repeat customers.

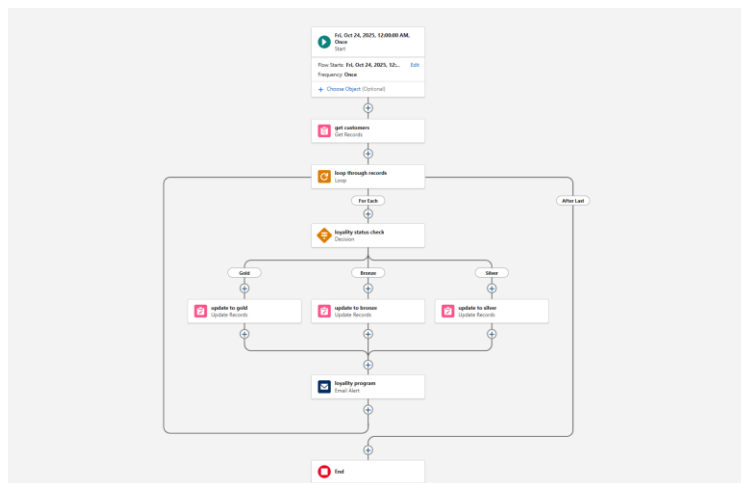


Image 2.2 Loyalty Program Flow

## Apex Classes & Triggers

### 1. Order Total Trigger:

- Automatically updates the total order amount based on product quantity and price.

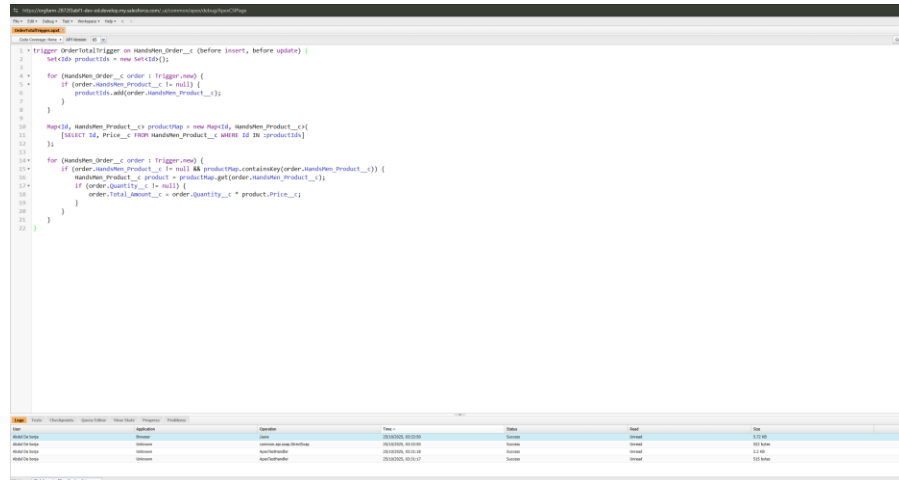


Image 3.1 Order Total Trigger

## 2. Stock Deduction Trigger:

- Deducts the ordered quantity from inventory upon order confirmation.

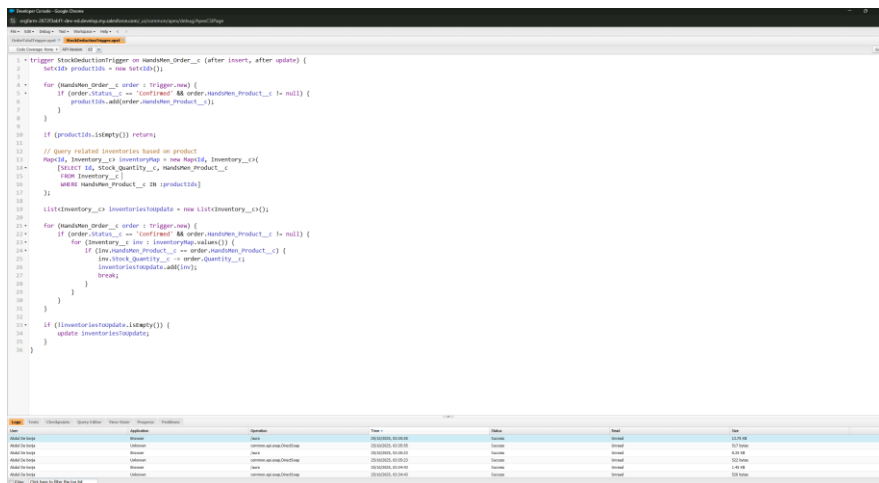


Image 3.2 Stock Deduction Trigger

## Phase 3: UI/UX Development & Customization

## Lightning App Setup

- Created **HandsMen Threads App** via App Manager with access to all relevant tabs (Customers, Orders, Inventory, Campaigns, Reports, Dashboards).

## Page Layouts & Dynamic Forms

- Tailored page layouts per user role (Sales vs. Inventory).
- Used Dynamic Forms to display fields based on order status (e.g., “Delivered” shows feedback section).

## User Management

- Defined custom profiles for Admin, Sales Executive, and Marketing Manager.
- Assigned permission sets for campaign creation and report viewing.

## Reports & Dashboards

- **Sales Summary Dashboard:** Tracks daily orders, revenue, and top-selling items.
- **Inventory Status Dashboard:** Displays stock levels and low-stock alerts.
- **Customer Loyalty Dashboard:** Highlights repeat customers and loyalty program engagement.

## LWC Development (Bonus)

- A small **Product Showcase LWC** was created to display trending items dynamically.

## Phase 4: Data Migration, Testing & Security

### Data Loading Process

- Imported customer and order data using **Data Import Wizard**.
- Used **Data Loader** for bulk inventory uploads.

### Field History Tracking & Duplicate Rules

- Enabled **Field History Tracking** on Orders and Inventory objects.
- Implemented **Duplicate Rules** to prevent repeated customer entries.



## **Profiles, Roles, and Permission Sets**

- Role Hierarchy: Admin → Sales Manager → Sales Executive → Marketing Manager → Inventory Manager.
- Permission Sets: “Marketing Access,” “Inventory Editor,” “Report Viewer.”

## **Test Classes**

- Developed Apex Test Classes for Order Trigger and Stock Deduction Trigger with 90%+ code coverage.

## **Testing Approach**

- Prepared detailed test cases for:
  - Order creation and confirmation (Flow & Trigger validation).
  - Inventory stock deduction.
  - Low stock and loyalty email notifications.
  - Approval process (if applicable).

## **Phase 5: Deployment, Documentation & Maintenance**

### **Deployment Strategy**

- Deployed from sandbox to production using **Change Sets** for all metadata components.
- Conducted post-deployment verification and user acceptance testing (UAT).

### **Maintenance & Monitoring**

- Regular data backup and audit logging enabled.
- Admin dashboard monitors trigger performance and email automation.

### **Troubleshooting Approach**

- Error logs tracked via Apex debug logs and Flow error emails.
- Issues resolved through sandbox replication and fix deployment.

## Conclusion

The **HandsMen Threads Salesforce CRM** successfully transformed a traditional fashion business into a smart, data-driven enterprise. It provides a unified view of customers, orders, and stock, enabling faster decisions and personalized customer experiences.

By leveraging Salesforce automation, Apex triggers, and dynamic dashboards, the CRM achieves both operational excellence and luxury-brand finesse — embodying the very essence of sophistication in men's fashion.

## Future Enhancements

- Integrate **AI-based style recommendations** and chatbot support for personalized shopping.
- Expand loyalty program management using Salesforce Einstein Analytics.
- Add mobile accessibility through Salesforce mobile app customization.