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

Project Overview

HandsMen Threads is a dynamic organization in the fashion industry embarking on a Salesforce CRM implementation designed to revolutionize data management and enhance customer relations.

The project aims to build a robust data model to store essential business data, ensuring smooth information flow across departments. A core focus is on maintaining data integrity directly from the user interface, ensuring accurate, consistent, and reliable records to support effective decision-making and efficient operations.

The system also integrates automation processes to improve customer service and operational efficiency.

Objectives

The main objective of this Salesforce implementation is to leverage CRM capabilities to:

- Streamline and automate business processes.
- Improve customer engagement and retention.
- Provide real-time, data-driven insights to decision-makers.

This project also strengthens technical expertise in:

- Salesforce Data Modelling
- Data Quality Management
- Lightning App Builder
- Record-Triggered Flows
- Apex Development & Asynchronous Apex.

Key Features

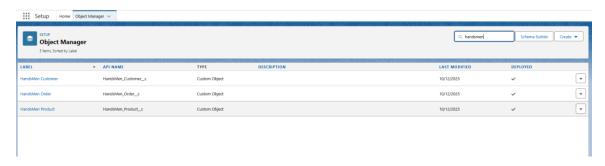
- Automated Order Confirmations Customers receive email confirmations after order placement, improving communication.
- Dynamic Loyalty Program Loyalty status updates automatically based on purchase history.
- Stock Alerts The warehouse team receives alerts when stock levels drop below threshold.
- Scheduled Bulk Order Updates Nightly updates ensure inventory and financial data accuracy.

Phase 1: Requirement Analysis & Planning

- Created 5 custom objects: HandsMen Customer, HandsMen Product, HandsMen Order, Inventory, and Marketing Campaign.
- Added lookup relationships between these objects (e.g., Customer–Order, Product–Inventory).
- Created formula fields and validation rules (e.g., email validation on Customer object).
- Designed Flows, Apex Triggers, and Batch Jobs to support order and inventory functions.
- Built Email Templates for Order Confirmations, Low Stock Alerts, and Loyalty Program Updates.

Created 5 Custom Objects

1.



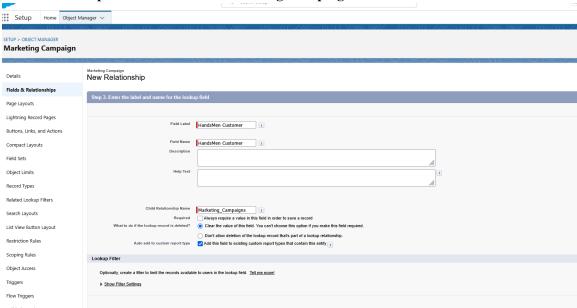
2.



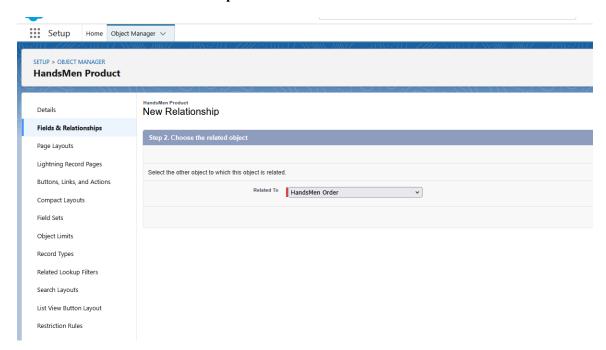
3.



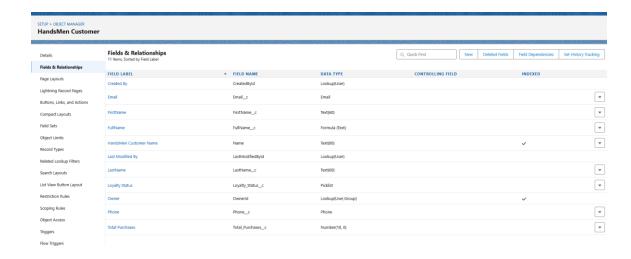
Created Lookup Relation Field in Marketing Campaign



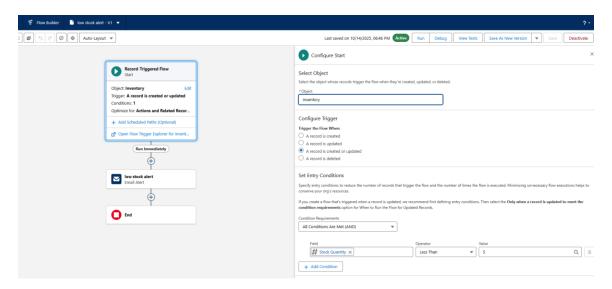
Created Handsmen Order Lookup Relation Field in Handsmen Product



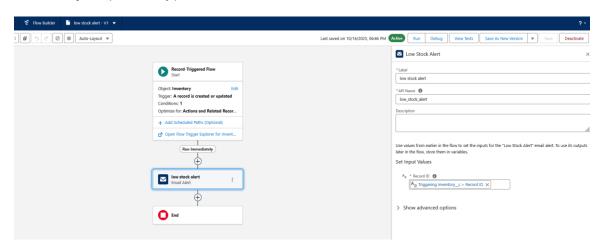
Now in the handsmen customer added all the remaining relationship object fields



Flow Builder for Low Stock Alert

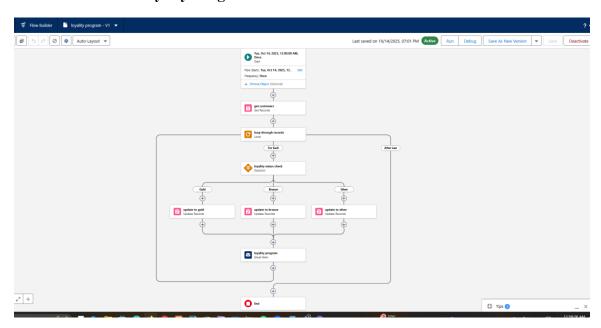


Start- Object {inventory}



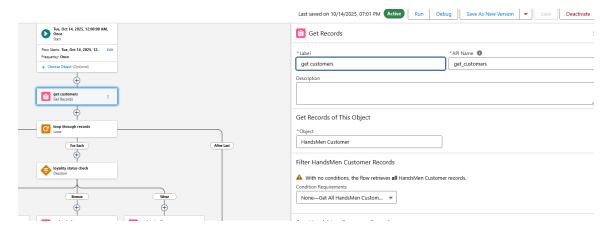
Email Alert- Low Stock Alert with the values of {!\$Record.Id}

Flow Builder For Loyalty Program

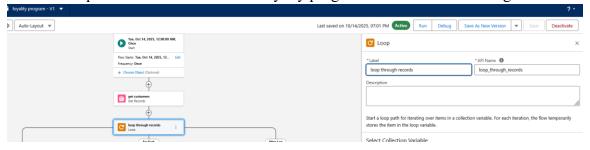


This Loyalty Program Flow shows the initiation of records which customers belong to.

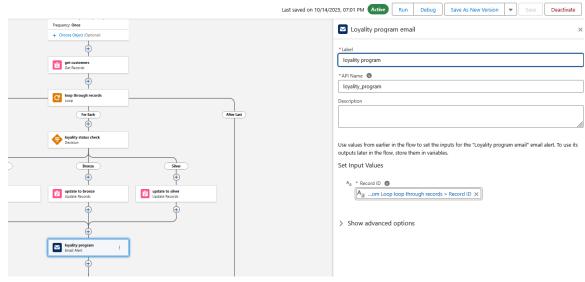
Loyalty Program flows



- 1. Gets customers record from Handsmen Customer
- 2. Created Loop for Email alert for which loyalty program does Customer belong

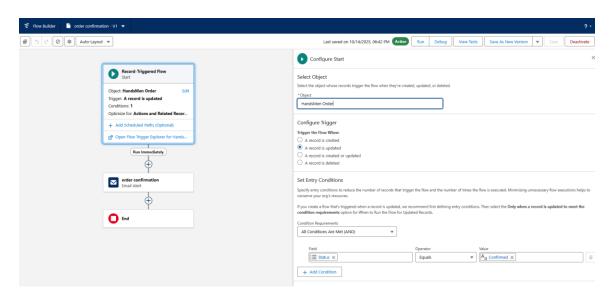


3. Loyalty program Email alert for update status records when recognized

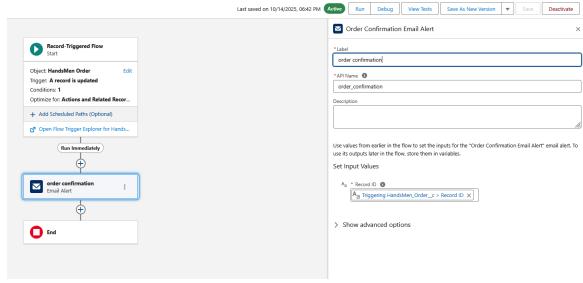


4. Now when they are now designated in which status, this decision flow decides where they get updated.

FLOW BUILDER FOR ORDER CONFIRMATION



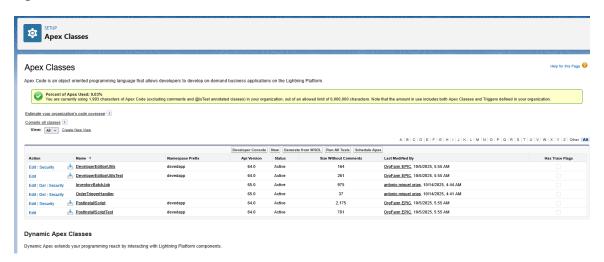
1. Shows the flow of the order confirmations when the record is updated from the Handsmen Order.



Shows the Email alert for order confirmations from the Handsmen Order.

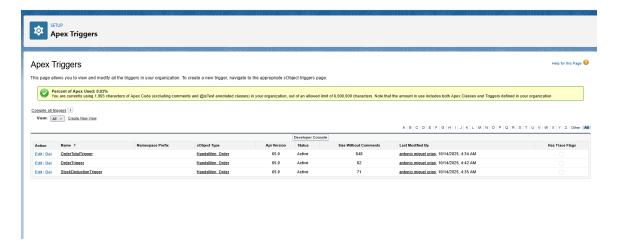
Apex Classes

2.



In this figure shows the Apex classes where I added Inventory batch job and order trigger handler, where order trigger handler manage the confirmation, pending and rejecting status. Then inventory batch job for the execution of Product stock quantity.

Apex Triggers



In this figure shows the functions of how the orders function from the Orders of customers. (order total trigger, order trigger, stock deduction trigger).

```
StockDeductionTrigger.apxt * NorderTriggerHandler.apxc * NorderTrigger.apxt * NorderTrigger.apxt * NorderTrigger on HandsMen_Order__c (before insert, before update) {

    if (Trigger.isBefore && (Trigger.isInsert || Trigger.isUpdate)) {

        OrderTriggerHandler.validateOrderQuantity(Trigger.new);

    }
}
```

Phase 2: Salesforce Development – Backend & Configurations

Email Templates

Template Name	Format	Trigger Condition
Order Confirmation Email	HTML	When an order is confirmed

Loyalty Program Email	HTML	When loyalty status is
		updated
Low Stock Alert	Text	When inventory stock is
		below 5 units

Record-Triggered Flows

Flow Name	Trigger Condition
Loyalty Program	When Customer record is updated
Order Confirmation	When Order status is updated
Low Stock Alert	When Inventory quantity is low

Apex Triggers

Trigger Name	Object	Purpose
Order Total Trigger	Customerc	Upgrade loyalty status based on total purchases
Order Trigger	Orderc	Auto-update Total_Amountc on order save
Stock Deduction Trigger	Inventory_c	Deduct stock when an order is placed

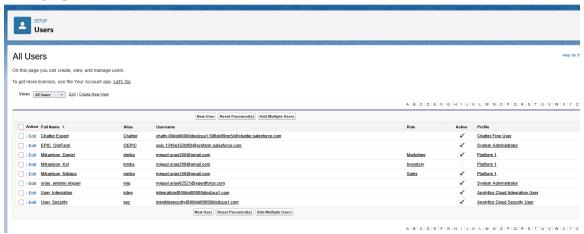
Batch Jobs

Job Name	Purpose
Loyalty Program	Update loyalty status regularly
Inventory	Update inventory stock status

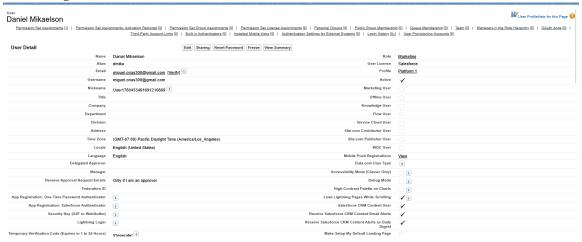
Phase 3: Customization

- Set up user management, roles, and profiles.
- Inventory Stock Levels

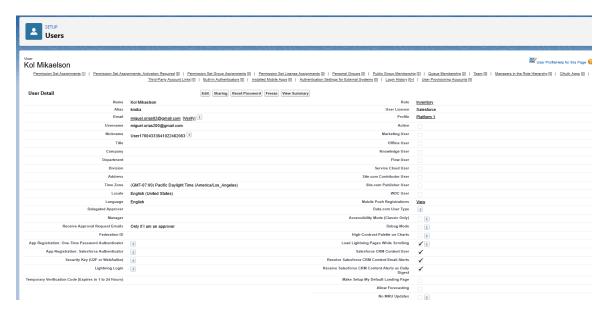
Setting Up Users and its Roles



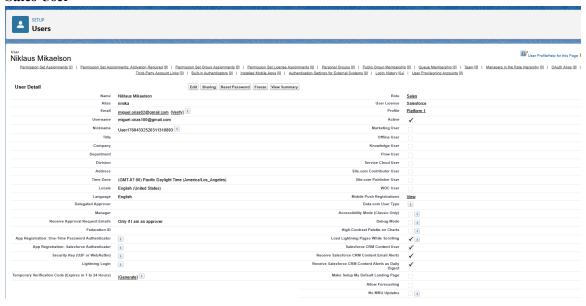
Marketing User



Inventory User



Sales User

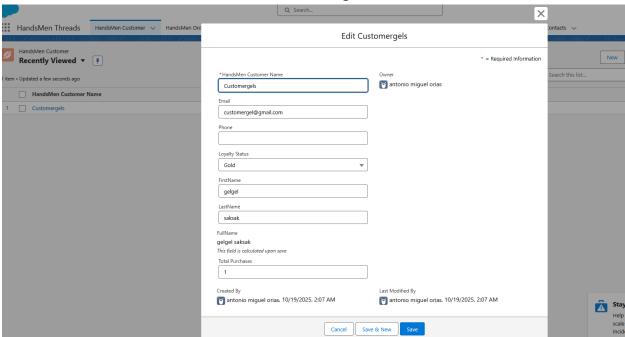


Phase 4: Testing & Security

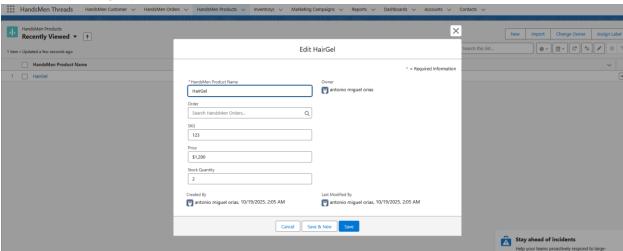
- Defined Profiles, Roles, Permission Sets, and Sharing Rules.
- Prepared and executed test cases:
- Order creation and stock deduction
- Loyalty program flow execution
- Order confirmation email delivery



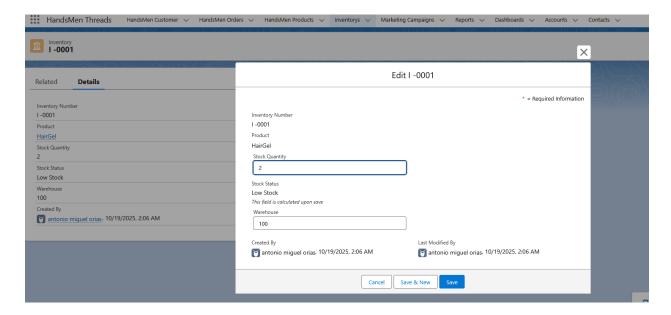
Creation of Handsmen customer named "Customergels"



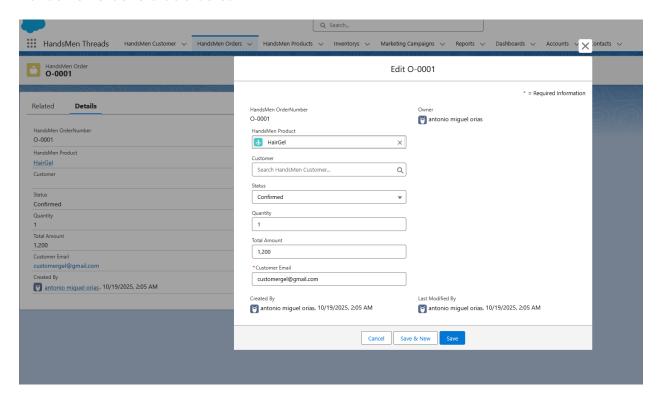
Creation of Hairgel products in Handsmen Products



Status of Hairgel in the inventory



Handsmen Order Status ordered



Conclusion

The Salesforce CRM implementation for HandsMen Threads successfully automated key business processes, enhanced data integrity, and improved customer engagement. By integrating flows, triggers, batch jobs, and security configurations, the project provides a scalable and reliable system that supports both day-to-day operations and long-term business growth.

Role	Access Permissions
Sales Manager	Full Access to Customers and Orders
Inventory Manager	Read/Edit Inventory & Products
Marketing Team	Read Customers, Edit Campaigns

Figure 1: Flow Builder - Low Stock Alert

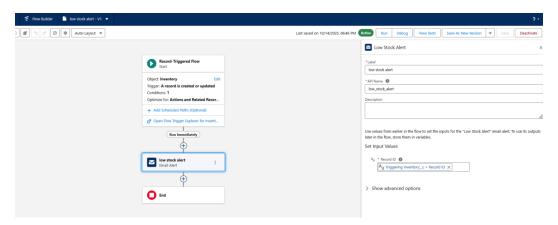


Figure 2: Flow Builder – Loyalty Program

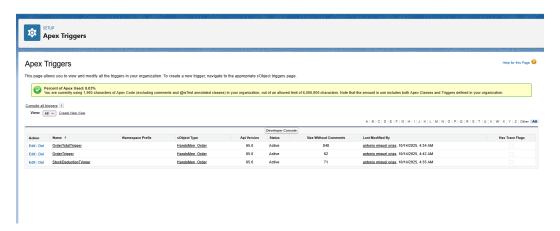


Figure 3: Flow Builder – Order Confirmation



Figure 4: Apex Classes – Inventory Batch Job and Trigger Handler

Object Name	Purpose
HandsMen_Customerc	Stores customer details
HandsMen_Orderc	Manages order transactions
HandsMen_Productc	Holds product information
Inventory_c	Tracks stock levels and warehouse
Marketing Campaign c	Manages marketing initiatives

Figure 5: Apex Triggers – Order and Inventory Logic

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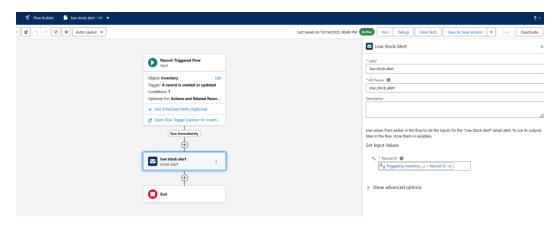


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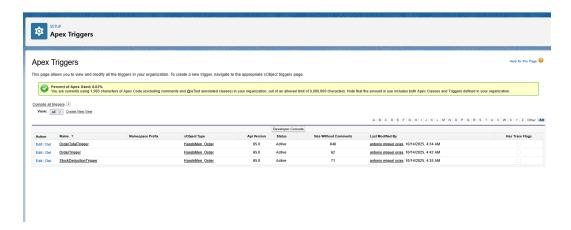


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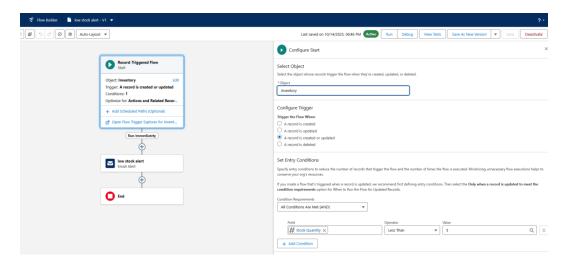


Figure 6: Testing – HandsMen Customer Creation

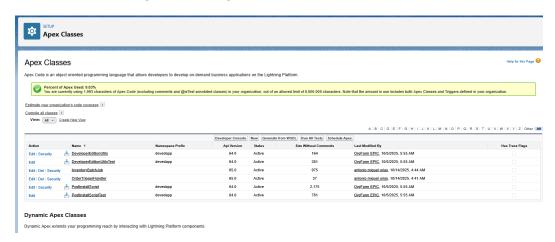


Figure 7: Testing – Product Creation

Trigger Name	Object	Purpose
Update Order Total	Orderc	Auto-calculate total on order save
Stock Deduction	Inventoryc	Decrease stock when an order is placed
Loyalty Status Update	Customerc	Update loyalty based on purchase history

Figure 8: Testing – Inventory Status

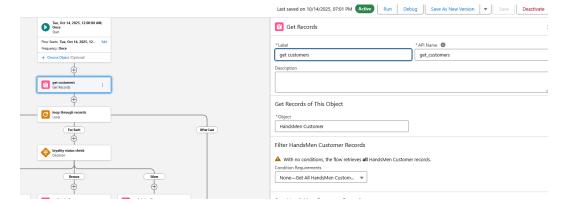


Figure 9: Testing – Order Status