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.**

A computer screen with a blue border

AI-generated content may be incorrect.

**2.**

A blue and white rectangular object

AI-generated content may be incorrect.

**3.**

A blue and white computer screen

AI-generated content may be incorrect.

**Created Lookup Relation Field in Marketing Campaign**A screenshot of a computer

AI-generated content may be incorrect.

**Created Handsmen Order Lookup Relation Field in Handsmen Product**

A screenshot of a computer

AI-generated content may be incorrect.

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

A screenshot of a computer

AI-generated content may be incorrect.

**Flow Builder for Low Stock Alert**

**A screenshot of a computer

AI-generated content may be incorrect.**

**Start**- Object {inventory}

A screenshot of a computer

AI-generated content may be incorrect.

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

**Flow Builder For Loyalty Program**

**A computer screen shot of a computer screen

AI-generated content may be incorrect.**

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

**Loyalty Program flows**

**A screenshot of a computer

AI-generated content may be incorrect.**

1. Gets customers record from Handsmen Customer
2. Created Loop for Email alert for which loyalty program does Customer belong**A screenshot of a computer

   AI-generated content may be incorrect.**
3. Loyalty program Email alert for update status records when recognized

**A screenshot of a computer

AI-generated content may be incorrect.**

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

**FLOW BUILDER FOR ORDER CONFIRMATION**

**A screenshot of a computer

AI-generated content may be incorrect.**

1. Shows the flow of the order confirmations when the record is updated from the Handsmen Order.
2. A screenshot of a computer

   AI-generated content may be incorrect.Shows the Email alert for order confirmations from the Handsmen Order.

**Apex Classes**

**A screenshot of a computer

AI-generated content may be incorrect.**

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**

A screenshot of a computer

AI-generated content may be incorrect.

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

A screenshot of a computer

AI-generated content may be incorrect.

# 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 | Customer\_\_c | Upgrade loyalty status based on total purchases |
| Order Trigger | Order\_\_c | Auto-update Total\_Amount\_\_c 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  
A screenshot of a computer

AI-generated content may be incorrect.**

**Marketing User  
A screenshot of a computer

AI-generated content may be incorrect.**

**Inventory User**

**A screenshot of a computer

AI-generated content may be incorrect.**

**Sales User  
A screenshot of a computer

AI-generated content may be incorrect.**

# 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  
A screenshot of a computer

AI-generated content may be incorrect.

**Creation of Handsmen customer named** “Customergels”  
A screenshot of a computer

AI-generated content may be incorrect.

**Creation of Hairgel products in Handsmen Products  
A screenshot of a computer

AI-generated content may be incorrect.**

**Status of Hairgel in the inventory**

**A screenshot of a computer

AI-generated content may be incorrect.**

**Handsmen Order Status ordered**

**A screenshot of a computer

AI-generated content may be incorrect.**

# 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.

A screenshot of a computer

AI-generated content may be incorrect.

Figure 1: Flow Builder – Low Stock Alert

A screenshot of a computer

AI-generated content may be incorrect.

Figure 2: Flow Builder – Loyalty Program

A screenshot of a computer

AI-generated content may be incorrect.

Figure 3: Flow Builder – Order Confirmation

A screenshot of a computer

AI-generated content may be incorrect.

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

A screenshot of a table

AI-generated content may be incorrect.

Figure 5: Apex Triggers – Order and Inventory Logic

A screenshot of a computer

AI-generated content may be incorrect.

Figure 1: Flow Builder – Low Stock Alert

A screenshot of a computer

AI-generated content may be incorrect.

Figure 2: Flow Builder – Loyalty Program

A screenshot of a computer

AI-generated content may be incorrect.

Figure 3: Flow Builder – Order Confirmation

A screenshot of a computer

AI-generated content may be incorrect.

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

A screenshot of a table

AI-generated content may be incorrect.

Figure 5: Apex Triggers – Order and Inventory Logic

A screenshot of a computer

AI-generated content may be incorrect.

Figure 6: Testing – HandsMen Customer Creation

A screenshot of a computer

AI-generated content may be incorrect.

Figure 7: Testing – Product Creation

A screenshot of a computer

AI-generated content may be incorrect.

Figure 8: Testing – Inventory Status

A screenshot of a computer

AI-generated content may be incorrect.

Figure 9: Testing – Order Status