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

### **Project Overview**

Use Case:

HandsMen Threads, a dynamic organization in the fashion industry, is embarking on a Salesforce project designed to revolutionize their data management and enhance customer relations. The project involves building a robust data model tailored to store all pertinent business data, ensuring a seamless flow of information across the organization.

A key aspect of this project is maintaining data integrity directly from the user interface (UI). This feature safeguards the accuracy and consistency of data, enabling informed decision-making and reliable business operations. The system integrates several automation processes to optimize customer service and efficiency:

### **Objectives**

The objective of this Salesforce implementation is to leverage CRM capabilities to streamline business processes, improve customer retention, and provide data-driven insights. Key learning outcomes include mastering Salesforce Data Modelling, Data Quality Management, Lightning App Builder, Record Triggered Flows, Apex Development, and Asynchronous Apex.

**Key Features:**

•Automated Order Confirmations: Post-order confirmation, customers will receive an email update, fostering engagement and strengthening customer relations.  
•Dynamic Loyalty Program: Customer loyalty statuses will be updated based on purchase history, enabling personalized rewards and promoting repeat business.

•Proactive Stock Alerts: Notifies warehouse team when stock levels drop.  
•Scheduled Bulk Order Updates: Executes nightly updates to maintain accurate financial and inventory records.

**Project Phases**

**Phase 1: Architecture & Planning**

During this phase, The project from the business requirements require the creation of five objects that is (Handsmen Customer, Handsmen Product, Handsmen Order, Inventory , and Marketing Campaign.) with these object components will be used to use for relation field for (email,phone, and loyalty status) then creates lookup relationships from the five objects that were mentioned earlier of the sentence. Then create formula fields for the handsmen customer. Then creates handsmen customer validation rules for email and create flow , apex trigger and batch jobs for the function of orders and inventory. Then design email template for notification and customer communication (low stock alert, loyalty program email, order confirmation email).

**Phase 2: Development**

* Object and field creation.
* Implement automation (flows, process builders, Apex triggers).
* Set up data security and sharing rules.
* Develop batch jobs for scheduled processing.
* Configure email templates and notifications.

1. Create Objects of Handsmen Customers,Order,Product,Inventory,Marketing Campaign,

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1. Create Fields and relationships created Loyalty Status relationships for Product created object also created all needed relationship fields for others

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In this marketing campaign, shows the creation of Handsmen Customer field relation.

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Now in this Handsmen Product shows creation of Handsmen Order Lookup relationship (named Order).

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

**Table of Objects**

**Custom Objects**

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**Data Security Roles  
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**Email Templates**

|  |  |  |
| --- | --- | --- |
| Template Name | Format | Triggers |
| **Order Confirmation Email** | **HTML** | **When order is confirmed** |
| **Loyalty Program Email** | **HTML** | **What customer loyalty have** |
| **Low Stock Alert** | **Text** | **When stock order < 5** |

**Record-Trigger Flows**

|  |  |
| --- | --- |
| Flow Names | Trigger Condition |
| **Loyality program** | **{!loop\_through\_records.Id}** |
| **Order confirmation** |  |
| **Low stock alert** |  |

**Apex Triggers**

|  |  |  |
| --- | --- | --- |
| **Order Total Trigger** | **Customer\_\_c** | Upgrade loyalty status based on total purchases. |
| **Order Trigger** | **Order\_\_c** | Auto-update Total\_Amount\_\_c when an order is saved |
| **Stock Deduction Trigger** | **Inventory\_\_c** | Deduct stock when an order is placed |

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**Batch Jobs**

|  |  |
| --- | --- |
| **Job name** | Purpose |
| **Loyalty Program** | Loyalty status |
| **Inventory** | Inventory status |

**Flow Builder for Low Stock Alert**

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**Start**- Object {inventory}

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

**Flow Builder For Loyalty Program**

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

**Loyalty Program flows**

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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

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

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

**FLOW BUILDER FOR ORDER CONFIRMATION**

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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**

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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**

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

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**Phase 3: Testing & QA**

* Unit testing of objects and automation.
* End-to-end testing with sample data.
* Performance testing and security checks.

**Phase 4: Deployment & Training**

* Deploy to production.
* Train users on new functionality.
* Post-go-live support and monitoring

**Deliverable:**  
**Solution Design Document** including Object Model, ERD, and Automation Strategy.