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

**1. Abstract**

In the fashion retail sector, customer retention is not just a goal—it’s a necessity. As competition grows and customer expectations rise, businesses must adopt agile and intelligent solutions to keep their buyers engaged. HandsMen Threads, a growing fashion retailer, required a streamlined solution to evaluate customer loyalty dynamically based on their cumulative purchase behavior. This use case focuses on implementing a Salesforce Flow-based automation to assign loyalty tiers—Gold, Silver, and Bronze—depending on the customer’s total spending with the brand. Using custom fields like Total\_Purchases\_\_c and Loyalty\_Status\_\_c, the solution integrates business logic directly into the Salesforce platform. The automation not only eliminates the need for manual tracking but also improves internal team efficiency by updating loyalty tiers in real-time. This enables the marketing and sales departments to run more targeted campaigns and personalize the shopping experience. Overall, this use case demonstrates how Salesforce Flow can transform retail CRM strategies by linking automation, data visibility, and customer satisfaction into one seamless pipeline.

**2. Objectives:**

1. **Automate Loyalty Tier Assignment:** Implement a decision-based flow that evaluates each customer's total purchases and assigns a corresponding loyalty status (Gold, Silver, Bronze).
2. **Streamline Customer Data Management:** Integrate custom fields and logic into the existing Salesforce object schema to ensure real-time updates without manual intervention.
3. **Improve Customer Retention:** Use segmentation data from loyalty tiers to personalize marketing strategies and encourage higher engagement and repeat purchases.

**3. Tools & Platform**

* Salesforce Developer Org
* Flow Builder
* Custom Objects & Fields
* Profiles, Permission Sets
* Classic Email Templates

**4. Key Actors**

* **Sales Executive:** Views loyalty status of customers.
* **Admin:** Sets up flow, fields, permissions.
* **Customer:** Makes purchases (data input for flow logic).

**5. Steps :**

**📁 Step 1: Object & Field Setup**

* Created custom object: HandsMen\_Customer\_\_c.
* Added fields:
  + Total\_Purchases\_\_c (Number, 16,2)
  + Loyalty\_Status\_\_c (Picklist: Gold, Silver, Bronze)

**🔁 Step 2: Flow Configuration**

* Created a new **Record-Triggered Flow** on HandsMen\_Customer\_\_c.
* Triggered on **Create or Update** of records.
* Used **Decision Element**:
  + If Total\_Purchases\_\_c > 1000 → **Gold**
  + If between 500–1000 → **Silver**
  + Else → **Bronze**
* Used **Update Records** to assign Loyalty\_Status\_\_c.

**🛠️ Step 3: Activation & Testing**

* Activated the flow.
* Created sample customer records for validation.
* Verified automatic updates of Loyalty\_Status\_\_c.

**🔐 Step 4: Permissions & Access**

* Added access to HandsMen\_Customer\_\_c object in relevant profiles.
* Assigned necessary **Permission Sets** to test users.
* Configured **App Manager** for easy access.

**6. Result**

The flow dynamically updates the loyalty tier of each customer based on purchase values. This automation:

* Eliminates the need for manual updates.
* Offers real-time segmentation.
* Is scalable and modifiable for future criteria.

| **Total Purchase (₹)** | **Loyalty Tier** |
| --- | --- |
| > ₹1000 | Gold |
| ₹500 – ₹1000 | Silver |
| < ₹500 | Bronze |

**8. Conclusion**

The successful implementation of the Loyalty Tier Automation Flow for HandsMen Threads highlights the transformative impact of Salesforce in automating key customer lifecycle processes. By leveraging Salesforce Flow, custom fields, and user profile management, the project demonstrates a scalable and user-friendly solution to monitor customer value in real-time.

One of the most significant outcomes of this use case is the alignment between customer data and actionable insights. With loyalty statuses updated dynamically, the marketing team gains an accurate and immediate view of customer segments, facilitating precise campaign targeting and improved ROI on promotional efforts. The solution also reduces the dependency on technical personnel by using declarative tools available to Salesforce admins, making it sustainable for long-term maintenance and expansion.

Another vital achievement is the increased engagement between departments. By centralizing loyalty data, sales, support, and marketing teams can now collaborate around a single source of truth. This not only improves internal operations but also enhances the end customer experience.

In conclusion, this use case is a testament to the versatility and power of Salesforce when tailored to specific industry use cases like fashion retail. It provides a blueprint for other small and medium-sized businesses seeking to automate customer categorization and deepen client relationships through clean CRM design, robust flow logic, and meaningful user segmentation.