HandsMenThreads: Elevating Men's Fashion with Salesforce

Phase 1: Problem Understanding & Industry Analysis

Requirement Gathering
 HandsMen Threads, a leading men's fashion brand, faced challenges in managing customers, processing orders, optimizing inventory, and scaling marketing efforts. The business needed a unified CRM to automate processes, maintain data integrity, and provide real-time operational insights.

Stakeholder Analysis
 Key stakeholders included sales representatives, inventory managers, marketing teams, and customers. Each group had unique requirements for data access, process automation, and reporting.

Business Process Mapping
 Mapped out the end-to-end business processes:

- Customer onboarding and management

- Product and inventory tracking

- Order processing and fulfillment

- Marketing campaign management

- Customer loyalty tracking

Industry-Specific Use Case Analysis
 The solution was tailored for the retail fashion industry, focusing on high-volume order management, inventory accuracy, and personalized customer engagement.

AppExchange Exploration
 While the project primarily leveraged custom development, AppExchange was explored for potential add-ons. However, the core solution was built natively within Salesforce for maximum customization.

Phase 2: Org Setup & Configuration

Salesforce Editions & Developer Org Setup

 A new Salesforce Developer Org was set up via developer.salesforce.com/signup, serving as the main environment for all development and testing.
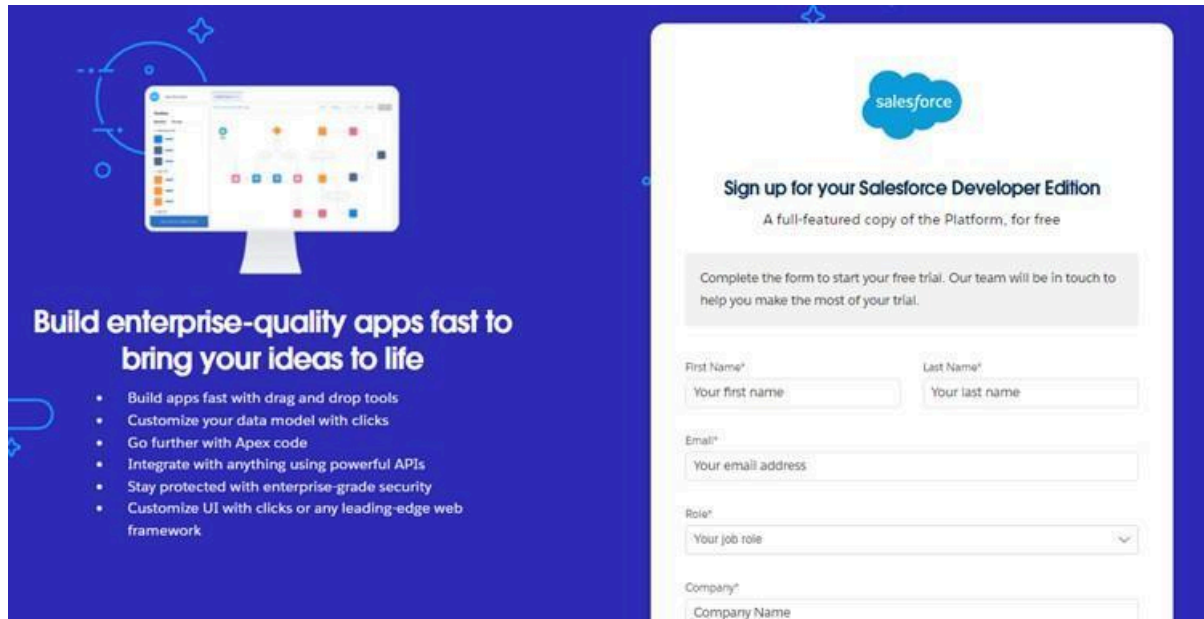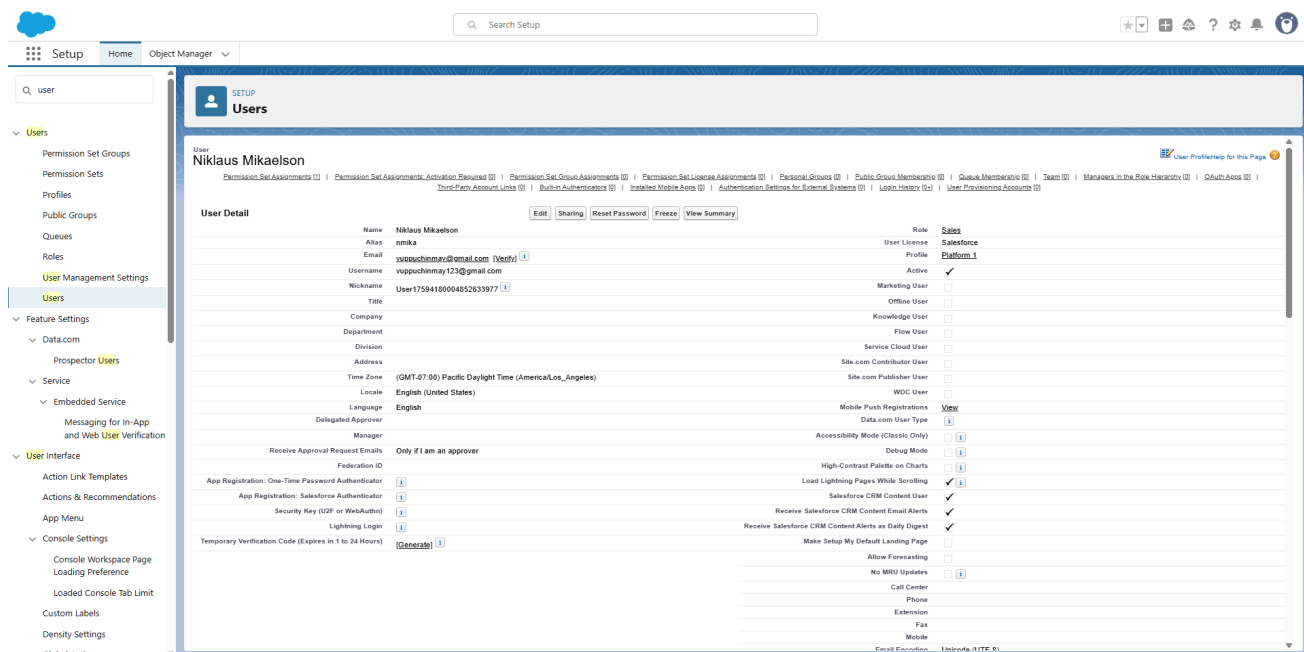

Company Profile Setup

 Company information, business hours, and fiscal year settings were configured to match HandsMen Threads' operational calendar.

User Setup & Licenses

 Users were created for different roles (e.g., sales, inventory, marketing), each assigned appropriate licenses.

Profiles, Roles, and Permission Sets

- **Profiles**: Custom profiles like "HandsMen Sales Profile" were created by cloning the Standard User profile and tailoring permissions.

- **Roles**: A hierarchy was established (e.g., Sales Manager, Inventory Manager) to control data visibility.
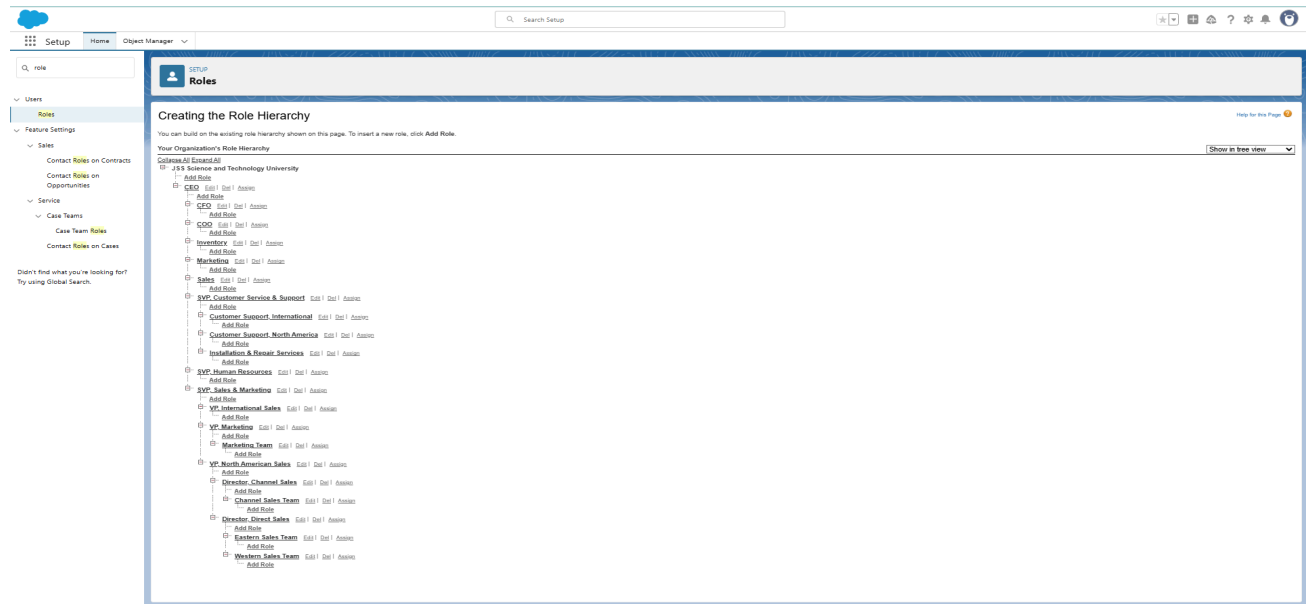
- **Permission Sets**: Used to grant additional access (e.g., to specific objects or fields) without altering base profiles.
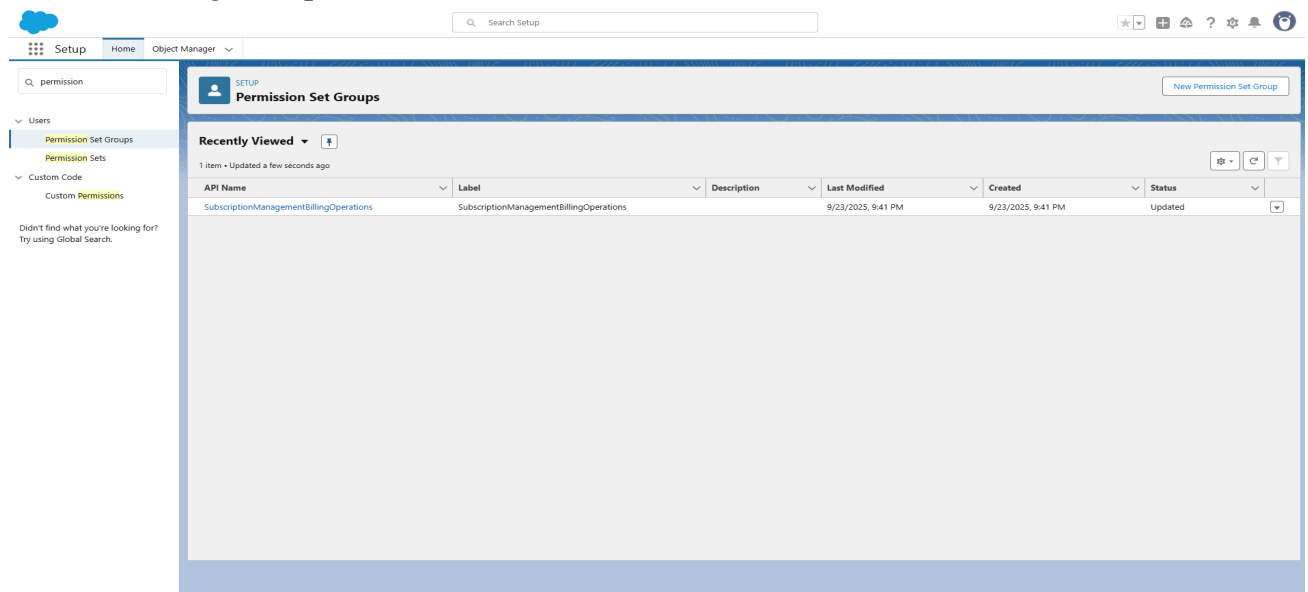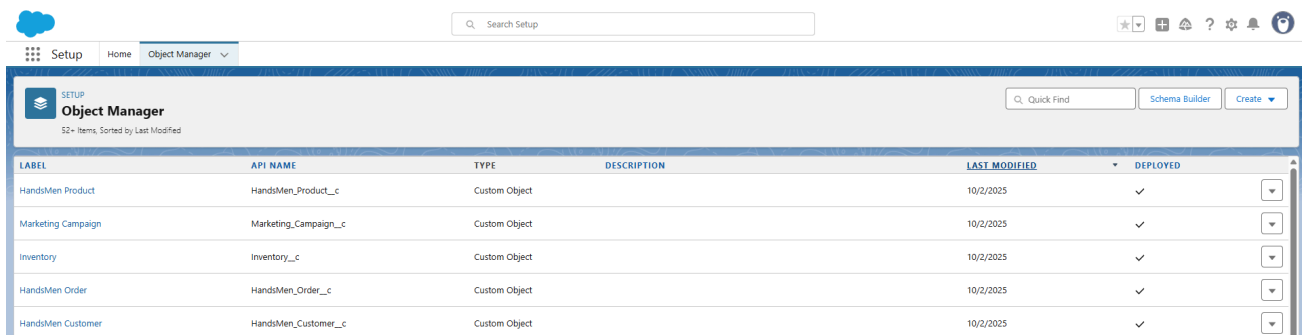
Phase 3: Data Modeling & Relationships

Standard & Custom Objects
Custom objects were created to model the business:

- HandsMen_Customer__c: Stores customer details and loyalty status.
- HandsMen_Product__c: Manages product catalog, pricing, and stock.
- HandsMen_Order__c: Tracks customer orders, linking to both Customer and Product.
- Marketing_Campaign__c: Records marketing initiatives.
- Inventory__c: To manage the inventory status.

Fields, Record Types, and Page Layouts
Each object was configured with relevant fields (e.g., Email, Stock, Total_Amount__c), and page layouts were customized for user efficiency.

Relationships

- **Lookup Relationships**: Orders link to Customers and Products.

- **Validation Rules**: Prevent negative stock and enforce email format (must contain "@gmail.com").

Tabs & Custom App
Custom tabs for each object were added to a new Lightning App, *"HandsMen Threads,"* providing a unified workspace.
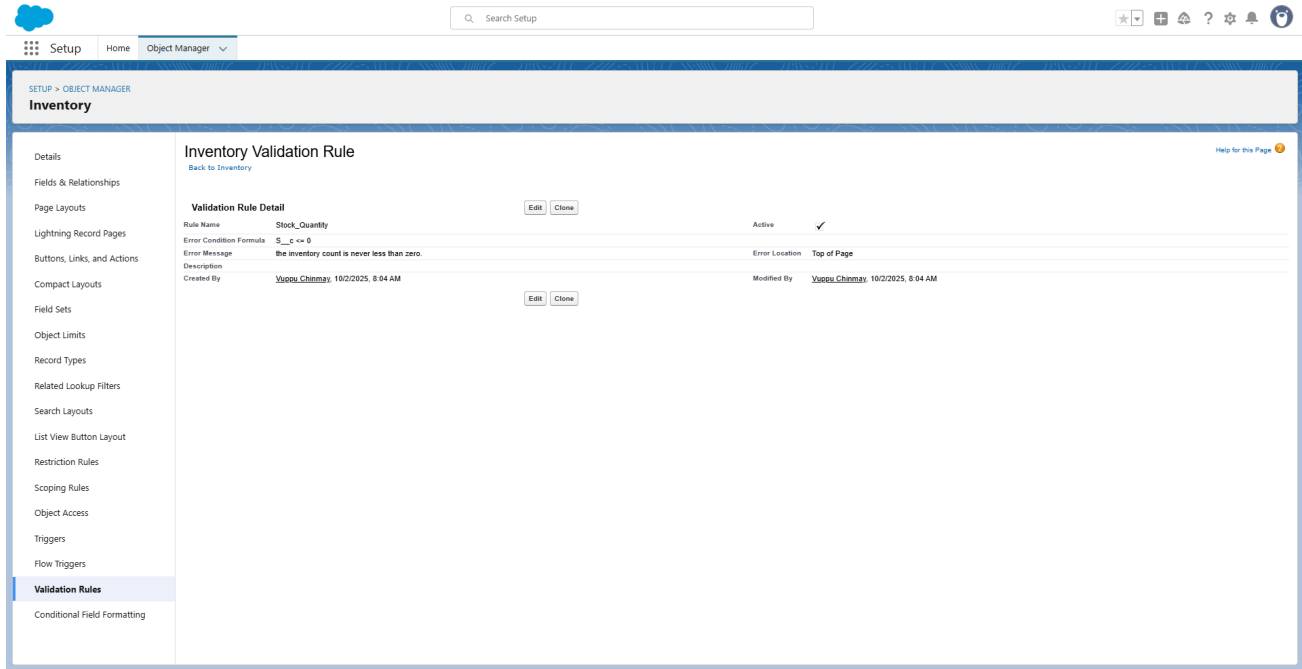
Phase 4: Process Automation (Admin)

Validation Rules

- **Inventory Stock**: Prevents $S\_\_c$ from dropping below zero.

- **Customer Email**: Ensures only Gmail addresses are accepted.

Flows

- **Email Notification Flow**: Sends order confirmation emails upon new order creation.
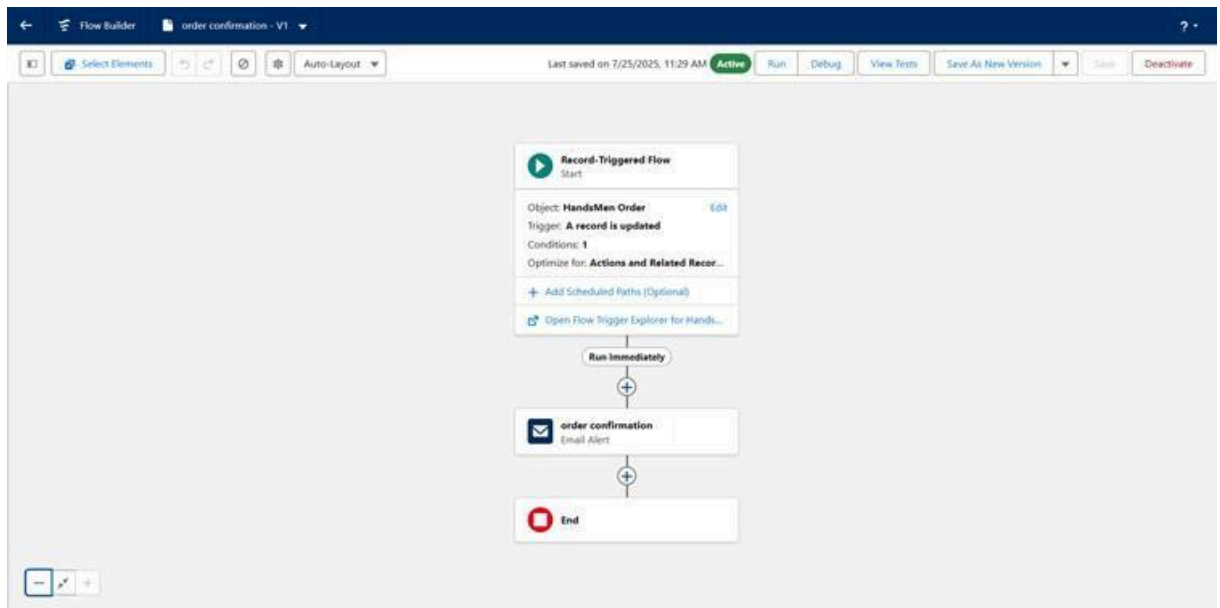
- **Stock Update Flow**: Automatically updates product stock when orders are placed or modified.
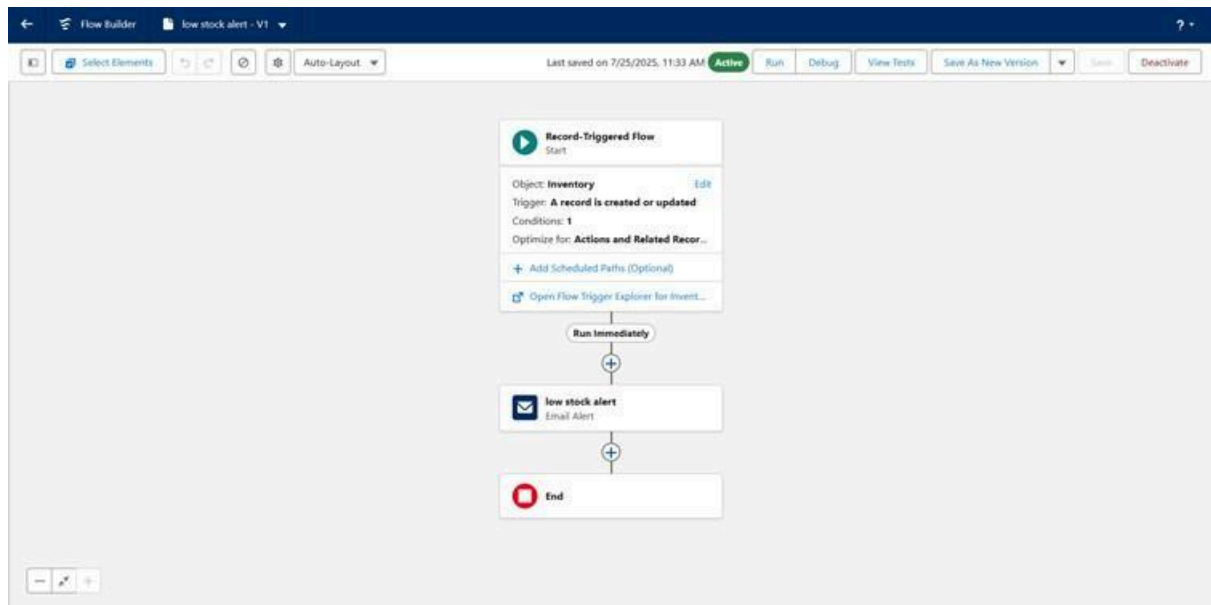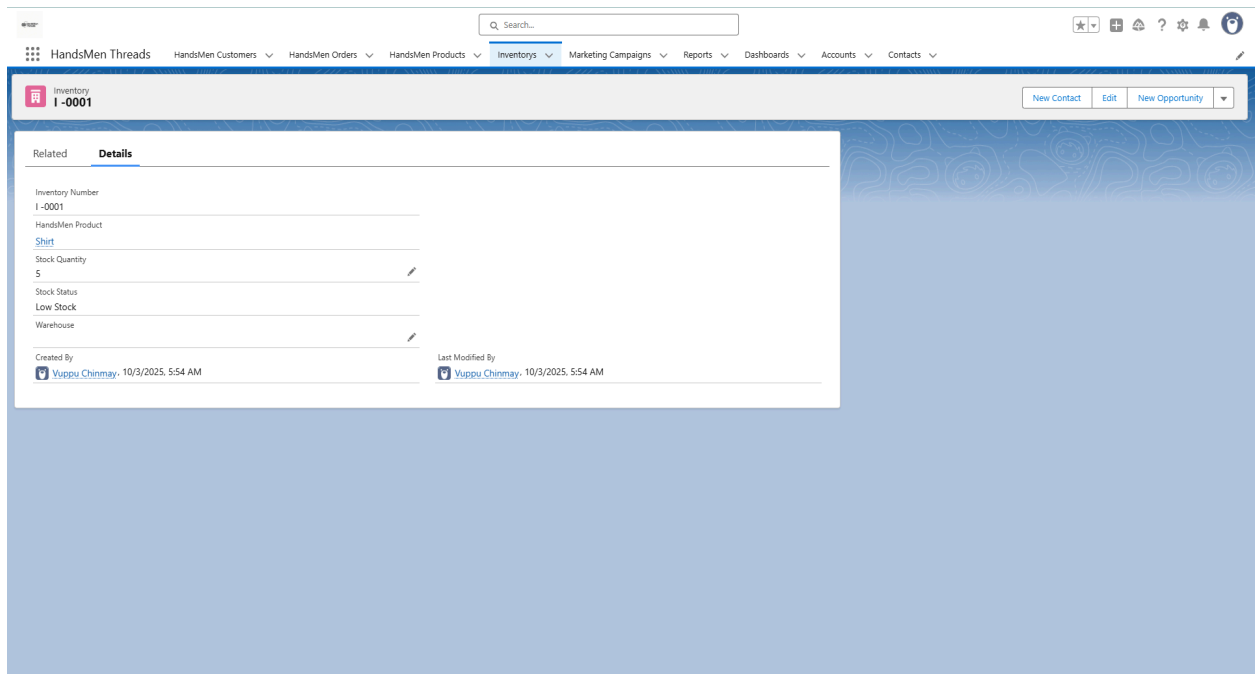
- **Scheduled Loyalty Update Flow**: Runs daily to update customer loyalty status based on purchase history.

Email Templates & Alerts

- **Order Confirmation**: Automated, branded emails sent to customers.

- **Loyalty Status Update**: Notifies customers when their loyalty status changes.

Phase 5: Apex Programming (Developer)

Apex was used in the HandsMen Threads project to handle business logic that could not be achieved with point-and-click tools alone. Here's how Apex was specifically implemented:

Order Total Trigger

- **What it does**: Automatically calculates and updates the Total_Amount__c field on an order.
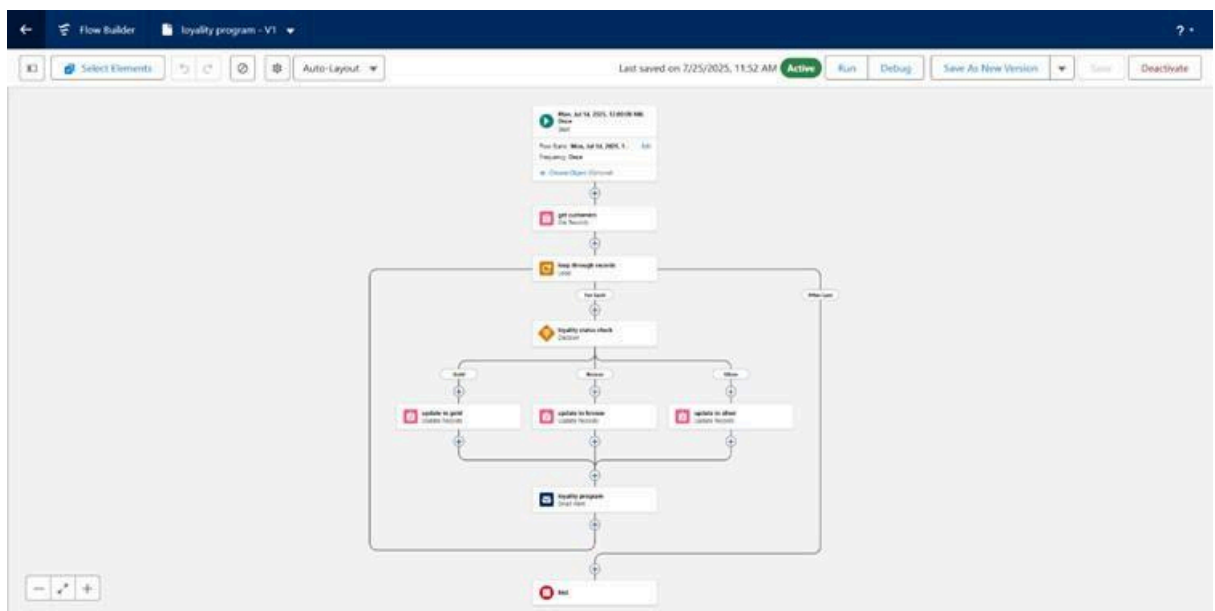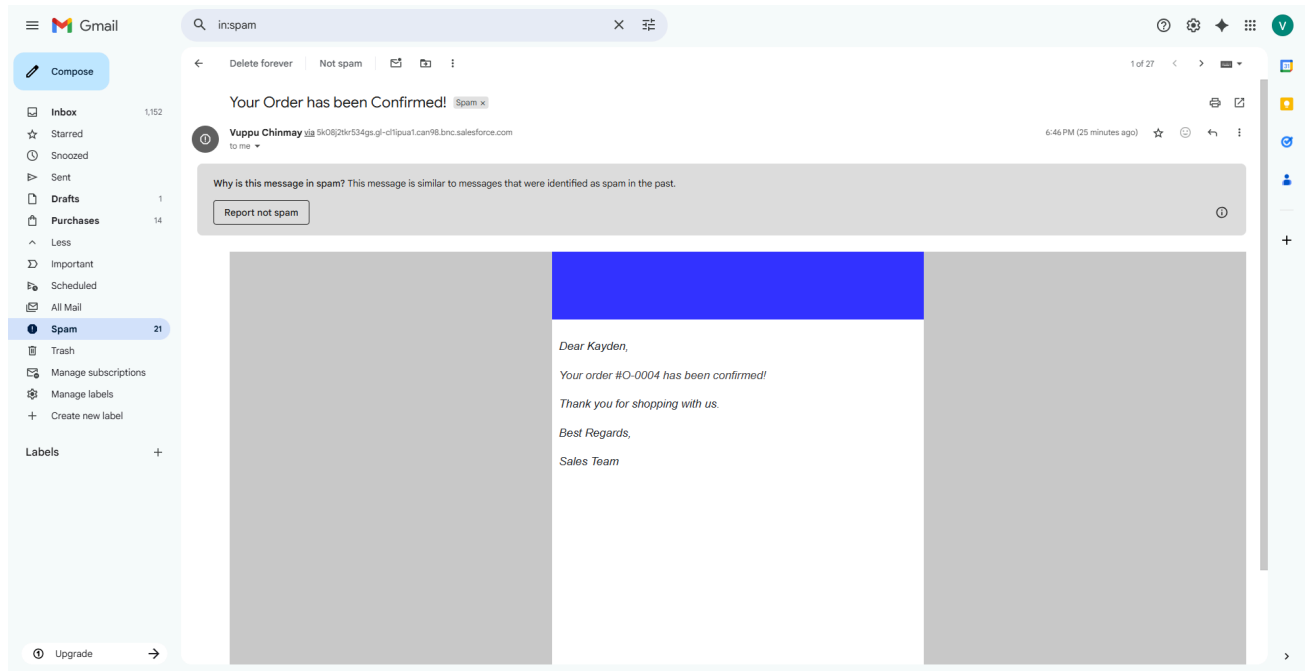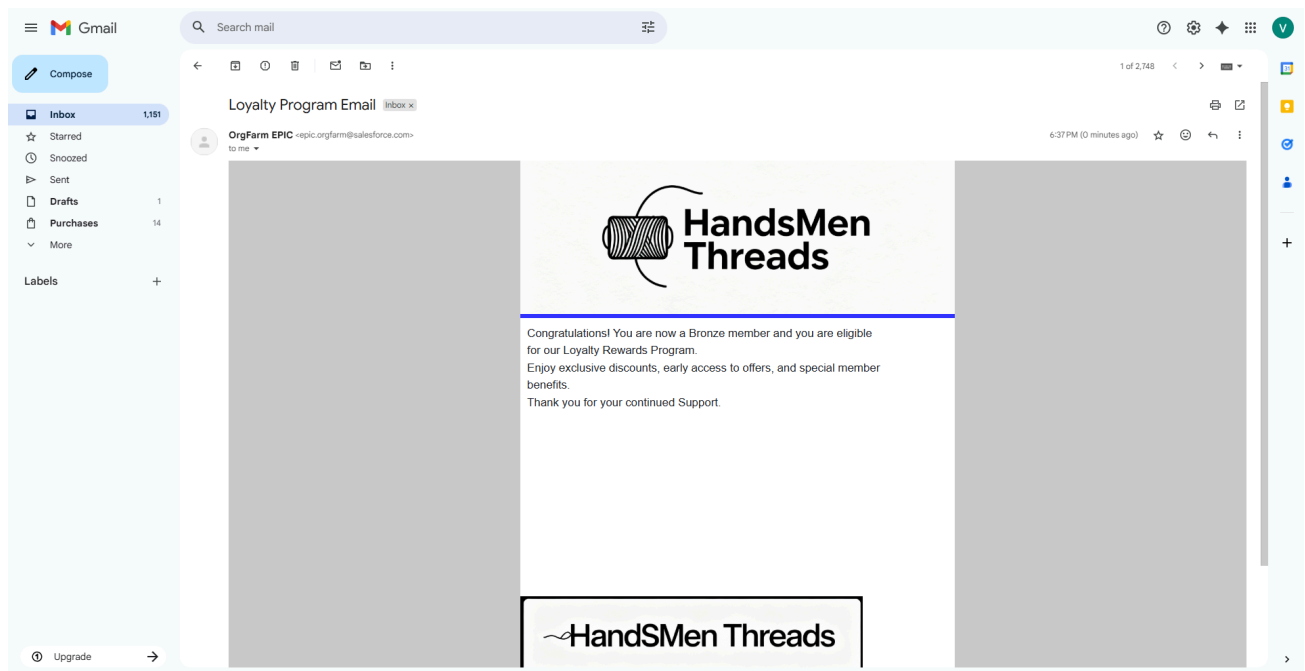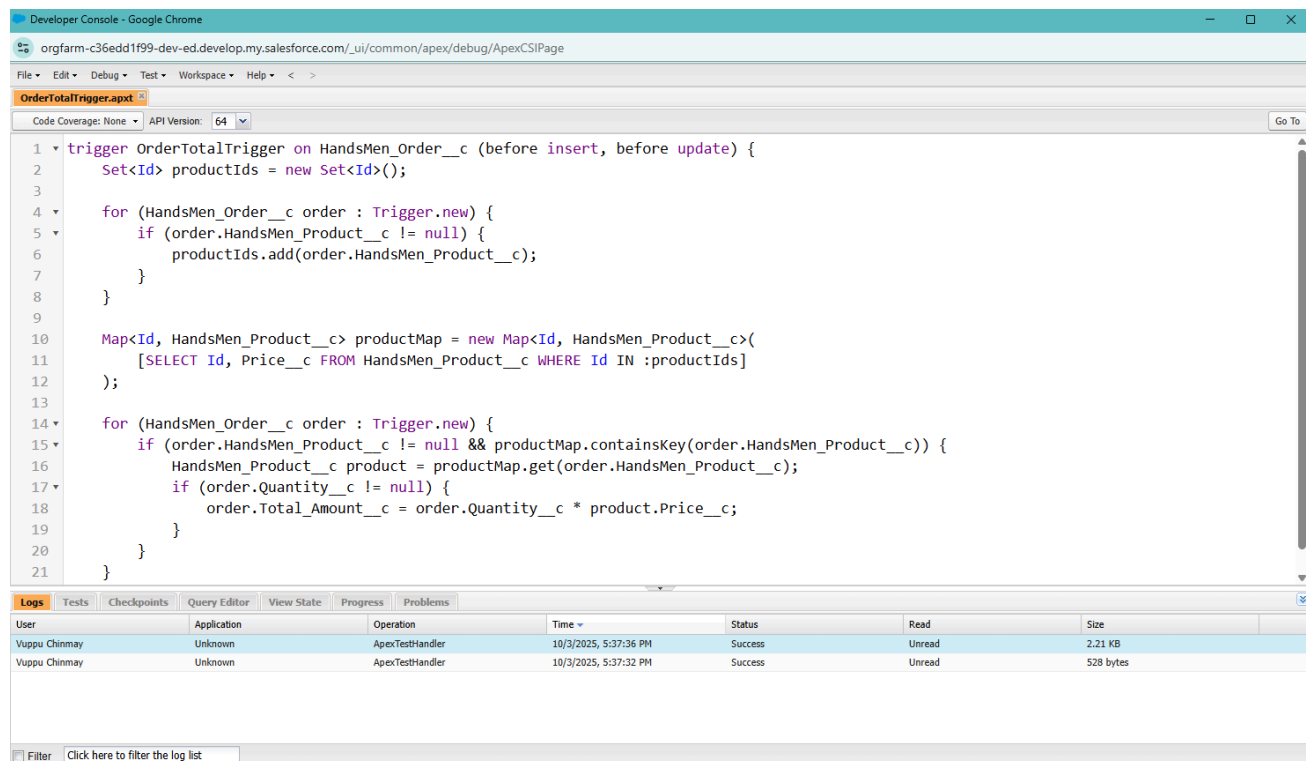 *Example*: If a sales rep creates an order for a product, the trigger multiplies the quantity by the unit price and updates the order record with the correct total.

- **Why it matters**: Ensures the order total is always accurate and eliminates manual calculation errors.

Stock Deduction Trigger

- **What it does**: Ensures that when an order is confirmed, the product's stock is reduced by the ordered quantity.
  Example: If there are 10 suits in stock and an order for 1 suit is placed, the stock is automatically updated to 9.

- **Why it matters**: Keeps inventory levels accurate and works with validation rules to prevent overselling.

Loyalty Status Trigger

- **What it does**: Updates the Loyalty_Status__c field on the customer record in real time, based on their cumulative purchase history.
  Example: If a customer's total purchases cross a certain threshold, their loyalty status is upgraded.

- **Why it matters**: Ensures customers are rewarded for their loyalty as soon as they qualify, enhancing customer satisfaction.

Phase 6: User Interface Development

The user interface was designed to make the system easy and efficient for all users.

Lightning App Builder & Custom App

- **What was built**: A custom Lightning App called *"HandsMen Threads"* was created. This app brings together all the relevant tabs—Customer, Order, Product, Inventory, Campaign, and Reports—into one place.

- **Why it matters**: Centralizes all business operations, making it easy for users to navigate and manage their work.

Tabs

- **What was done**: Custom tabs were created for each custom object (Customer, Product, Order, Marketing Campaign).

- **Why it matters**: Allows users to quickly access and manage records for each business area.
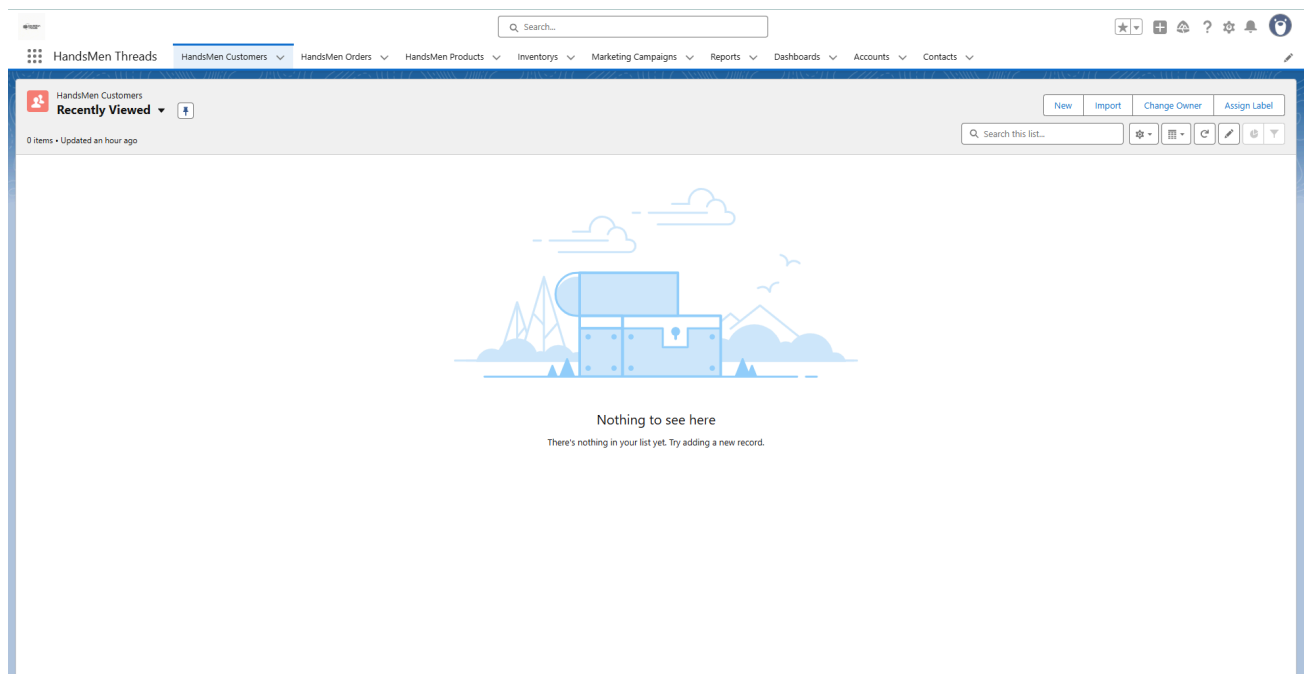
Record Pages

- **What was done**: Each object has its own record page, showing all the important information and related records.

- **Why it matters**: Makes it easy for users to see everything they need at a glance.

Phase 7: Integration & External Access

This phase was not directly implemented in the current project, but the document outlines future possibilities.

Customer Portal

- **What is planned**: A portal where customers can log in, view orders, track loyalty points, and get support.

Messaging Integration

- **What is planned**: Integration with messaging apps like SMS for real-time notifications.
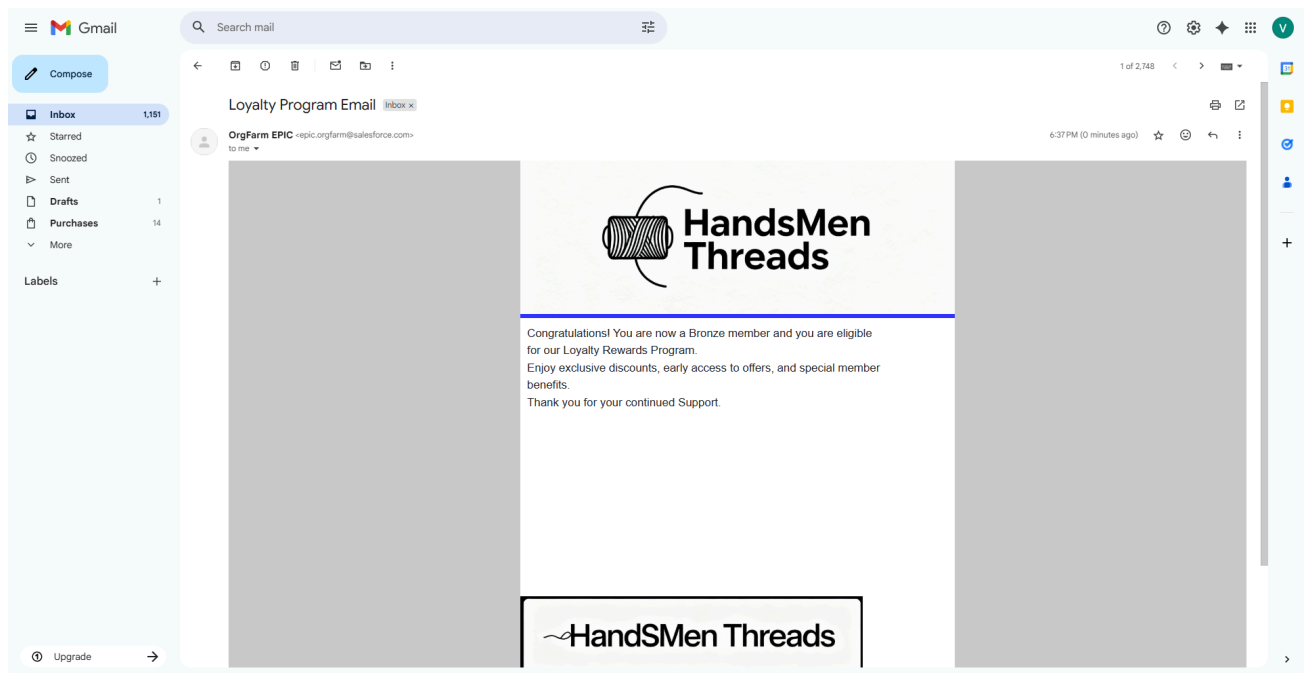
- The current project follows the mentioned format for real time notifications ie. emails. Though it was not implemented now it does has an opening towards this innovation.

Phase 8: Data Management & Deployment

Data Import

- **What was done**: Data for customers, products, and orders was entered into Salesforce using the custom objects created.

- **Why it matters**: Ensures all business information is stored in one place and is easy to manage.

Change Sets & Deployment

- **What was planned**: The project was developed in a Salesforce Developer Org, with the intention to use change sets or SFDX for future deployment to production.

- **Why it matters**: Allows for safe and controlled movement of customizations from development to production.
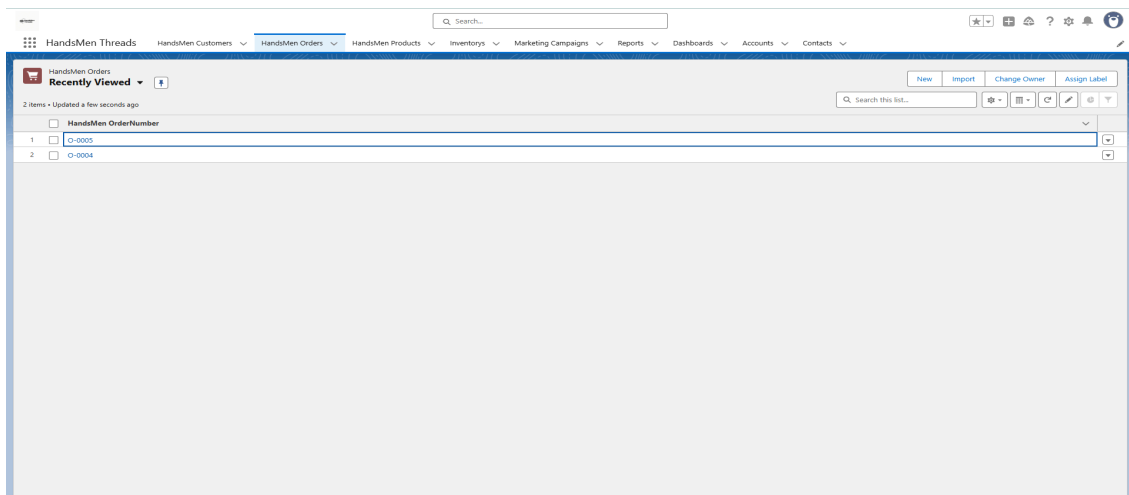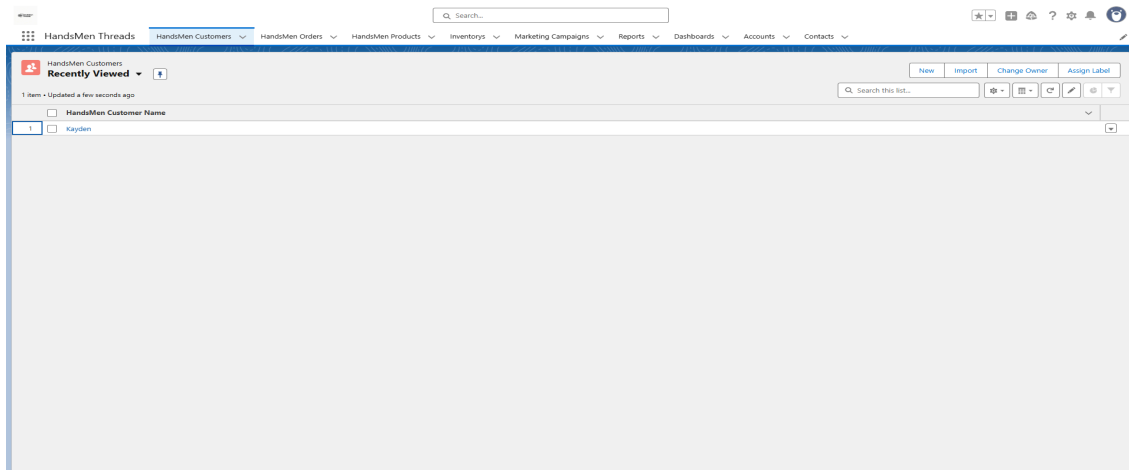
Phase 9: Reporting, Dashboards & Security Review

Reports & Dashboards

- **What was done**: Custom reports and dashboards were created to provide real-time insights into sales, inventory, and marketing performance.

- **Why it matters**: Helps teams track performance, spot trends, and make informed decisions.

Security Review

- **What was done**: Profiles and roles were set up to control who can see and do what in the system.

- **Why it matters**: Protects sensitive data and ensures users only have access to what they need.

Conclusion

Our Salesforce CRM for HandsMen Threads is a game-changer. It smoothly handles our core business operations, builds stronger customer relationships, and keeps our data incredibly accurate across sales, inventory, and marketing. By harnessing Salesforce's powerful features – from custom objects and smart automations (flows) to strict data checks (validation rules), timely alerts, and custom code (Apex) – we've created an integrated platform. This gives HandsMen Threads instant insights, helps us make smarter decisions, and builds a solid foundation for growth and even more amazing customer experiences down the road.

Future Scope

We're not stopping here! Here are some exciting ways we can make the HandsMen Threads CRM even better:

- **Customer Portal**: Imagine a dedicated online portal where customers can log in, view their past orders, track their loyalty points, update their details, and even get support – all on their own!
- **Mobile App Development**: We can build a slick mobile app for our in-store teams using the Salesforce Mobile SDK. This would let them manage inventory, process orders, and access customer info right from their phones or tablets.
- **Advanced Reports & Dashboards**: Let's create some jaw-dropping sales and inventory dashboards in Salesforce! These visual tools would give us deeper insights into our performance, help us spot trends, and guide our strategic decisions.
- **AI-Powered Recommendations (Salesforce Einstein)**: We could integrate Salesforce Einstein to offer personalized product recommendations to customers. Think about it: suggestions based on their past purchases or what similar customers love – a real sales booster!
- **Messaging Integration**: Connecting with popular messaging apps like WhatsApp or SMS would let us send real-time order confirmations, shipping updates, loyalty program news, and even personalized marketing messages directly to our customers' phones.