### HandsMen Threads: Salesforce CRM Documentation

## **Project Overview**

HandsMen Threads is a tailor-made Salesforce CRM solution crafted for a premium men's fashion brand. This application is designed to streamline custom order management, optimize inventory control, and enhance customer engagement through intelligent automation. The system utilizes custom objects, flows, validation rules, Apex triggers, and scheduled jobs to manage end-to-end operations with minimal manual intervention.

# **Objectives**

- Automate repetitive business tasks (e.g., order confirmation, loyalty updates).
- Enhance operational efficiency across sales, inventory, and customer service.
- Minimize human error by enforcing data validation and process flows.
- Provide real-time insights for decision-making through scalable architecture.

## Phase 1: Requirement Analysis & Planning

- Identified core entities requiring tracking: customers, orders, products, inventory, and campaigns.
- Mapped relationships using Lookup and Master-Detail fields.
- Defined field types (Text, Currency, Picklist, Formula).
- Documented business rules, validation logic, and automation requirements.

## Phase 2: Salesforce Development - Backend & Configurations

- Used Object Manager to create custom objects and associated fields.
- Developed Flows.
- Created Apex classes.
- Designed Email Templates.
- Automated email sending via Flow Actions.

# Phase 3: UI/UX Development & Customization

- Added custom tabs and icons using App Manager.
- Created tailored Page Layouts and Lightning Record Pages.
- Integrated user-friendly validation messages.
- Enabled smooth navigation in the Lightning Experience interface.

# Phase 4: Data Management, Testing & Security

- Populated system with sample data.
- Performed unit testing on Flows and Apex classes.
- Conducted manual UI/UX testing across user roles.
- Verified post-migration data integrity for key objects.
- Used assertions in test classes to ensure data correctness.
- Achieved >85% test coverage for Apex logic.

# Phase 5: Deployment, Documentation & Maintenance

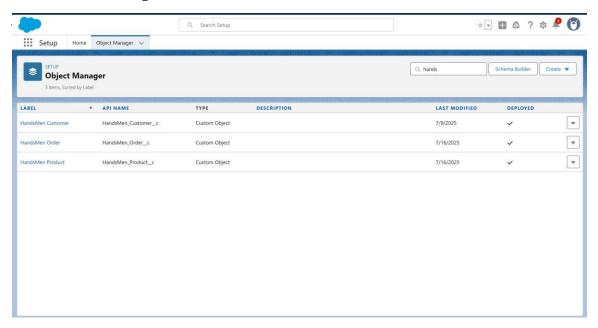
- Deployed metadata using Salesforce CLI and SFDX.
- Initialized version control with Git.
- Uploaded documentation and screenshots to GitHub.

# **Detailed Implementation & Configuration**

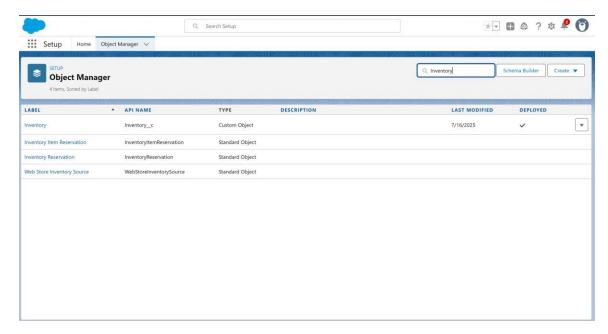
## **Data Management**

## **Objects**

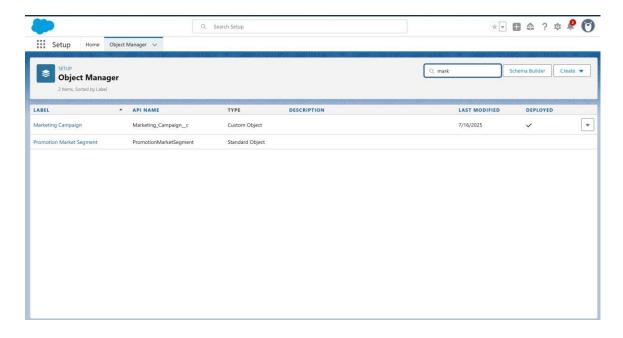
- **HandsMen\_Customer\_c**: Stores customer information including contact details, loyalty status, and order history, enabling personalized engagement and service tracking.
- **HandsMen\_Product\_c:** Captures product data like name, fabric type, price, and availability, supporting custom order creation and inventory monitoring.
- **HandsMen\_Order\_c:** Tracks individual customer orders, linking products, quantities, and order status, and integrates with automated confirmation and fulfillment.



• Inventory: Manages stock levels of products across locations.

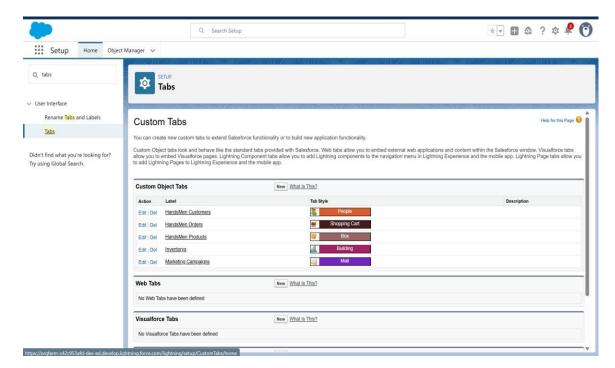


• Marketing\_Campaign\_c: Represents promotional campaigns with fields for campaign type, duration, and target audience, enabling marketing performance tracking and outreach automation.



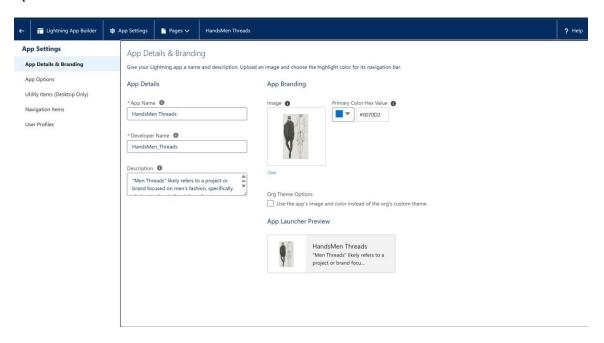
### **Tabs**

• **Tab - HandsMen Customer:**A custom navigation tab that provides users with quick access to the HandsMen\_Customer\_c records, streamlining customer management within the app.



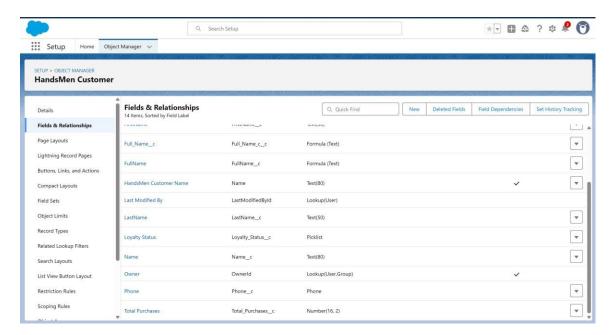
# **App Manager**

 App - HandsMen Threads: A custom Salesforce Lightning app that centralizes access to all HandsMen CRM components like customers, orders, products, and inventory for seamless operations.

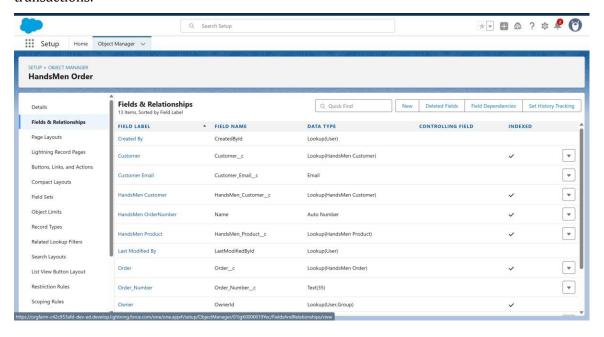


# **Fields**

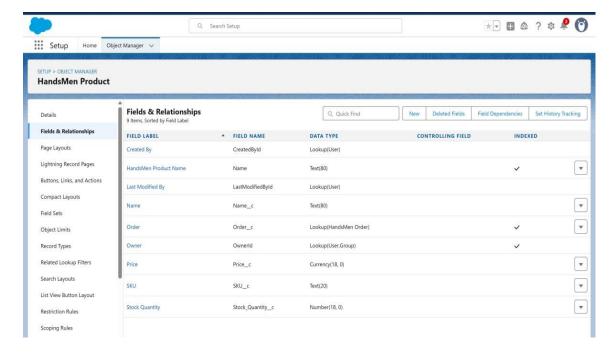
• **Fields -HandsMen Customer:** Includes custom fields such as Name, Email, Phone, Loyalty\_Status\_c, and Preferred\_Style\_c to capture detailed customer profiles for tailored service delivery.



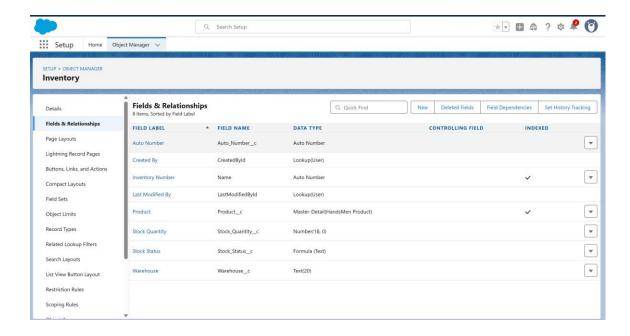
• **Fields -HandsMen Order:** Contains fields like Order\_Date\_c, Product\_c (lookup), Quantity\_c, Total\_Amount\_c, and Order\_Status\_c to manage and track customer purchase transactions.



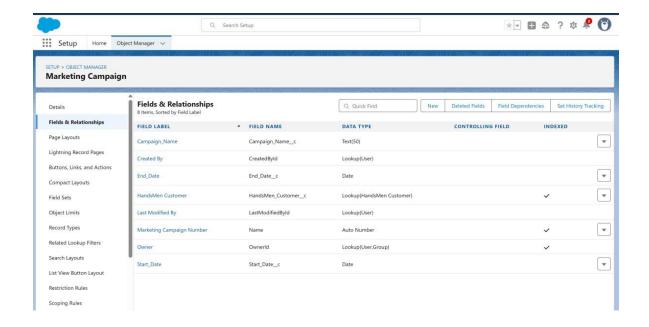
• **Fields -HandsMen Product:** Includes fields such as Product\_Name\_c, Fabric\_Type\_c, Price\_c, Size\_c, and Availability\_Status\_c to define product specifications and support inventory tracking.



• **Fields-Inventory:** Comprises fields like Product\_c (lookup), Stock\_Quantity\_c, Stock\_Status\_c, and Warehouse\_Location\_c to monitor stock levels and manage supply efficiently.

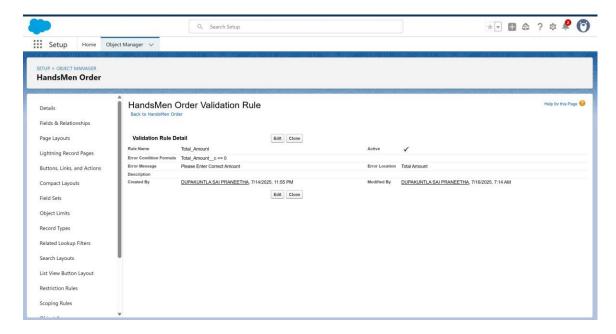


• **Fields- Marketing\_Campaign:** Includes fields like Campaign\_Name\_c, Start\_Date\_c, End\_Date\_c, Target\_Audience\_c, and Campaign\_Type\_c to define and track marketing initiatives.



# **Data Configuration**

• **Validation Rules - HandsMen Order:** Ensures data accuracy by enforcing rules such as preventing negative quantities or missing product references during order creation.

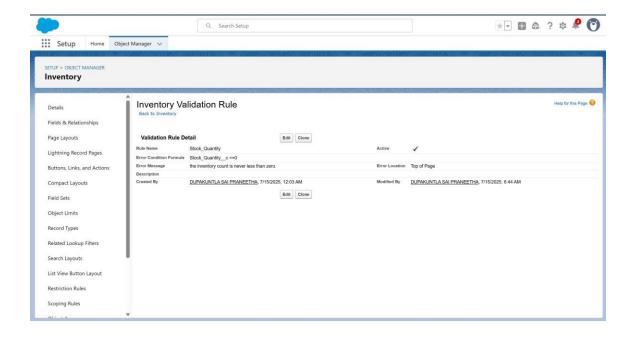


 Validation Rules - HandsMen Customer: Implements checks to ensure required fields like Email and Phone are entered correctly and validates the uniqueness or format of customer data.

\*- 🖽 🕾 ? 🌣 🔑 👩 Q Search Setup Setup Home Object Manager V HandsMen Customer HandsMen Customer Validation Rule Details Fields & Relationships Edit Clone Lightning Record Pages Error Condition Formula NOT CONTAINS(Email\_c, "@gmail.com") Buttons, Links, and Actions Modified By DUPAKUNTLA SAI PRANEETHA, 7/16/2025, 7:18 AM Created By DUPAKUNTLA SAI PRANEETHA, 7/15/2025, 12:08 AM Edit Clone Field Sets Object Limits Related Lookup Filters Search Layouts List View Button Layout Restriction Rules Scoping Rules

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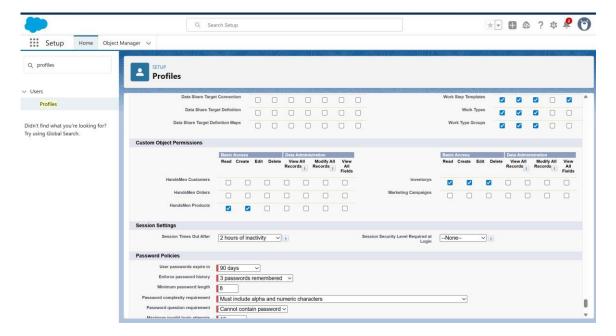
Validation Rules Inventory: Enforces rules to prevent invalid stock entries, such as
disallowing Stock\_Quantity\_c from being zero or negative, ensuring accurate inventory
tracking.



# **Data Security**

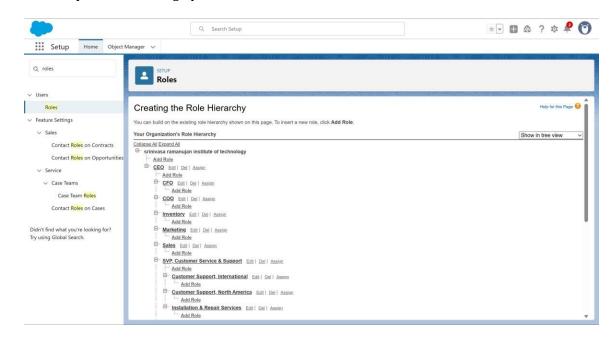
### **Profiles**

• **Profile – Sales:** Defines permissions for sales users, granting access to relevant objects like Orders and Customers while restricting administrative settings and sensitive data.



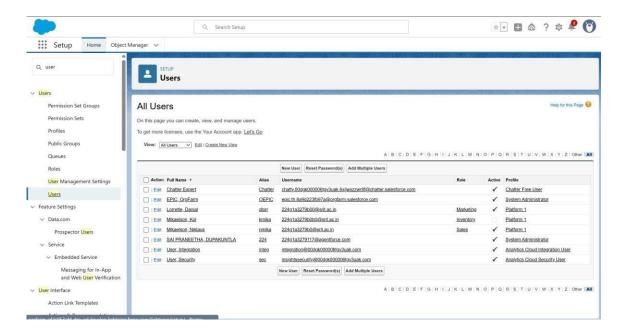
### **Roles**

**Role – Sales,Inventory Manager** and **Marketing Manager**: Defines a role hierarchy to control record visibility and reporting structure, aligning user access with responsibilities in sales, inventory, and marketing operations.



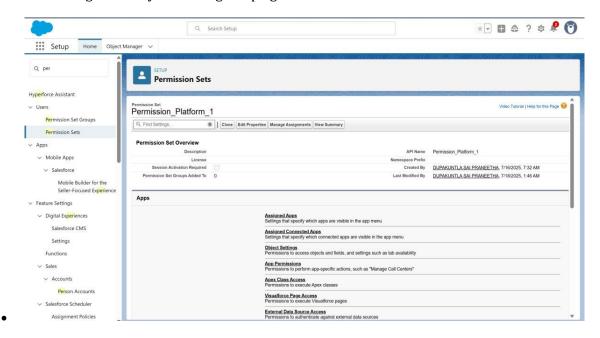
### **Users**

• **User – Niklaus, Kol, Lorretta Daniel:** Sample users representing different roles (e.g., Sales, Inventory Manager, Marketing Manager) used for testing role-based access and CRM functionality.



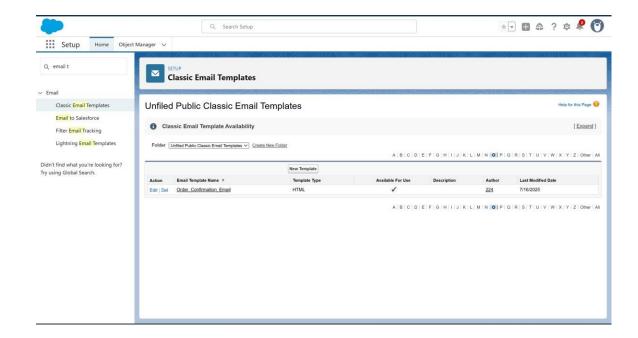
## **Permission Sets**

• **Permission set - Permission\_Platform\_1 :** Grants additional object-level and field-level access beyond profile limits, enabling specific users to perform actions like editing inventory or viewing campaign data.

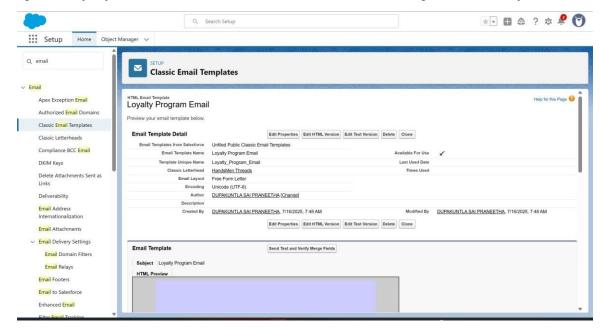


# **Email Templates & Alerts**

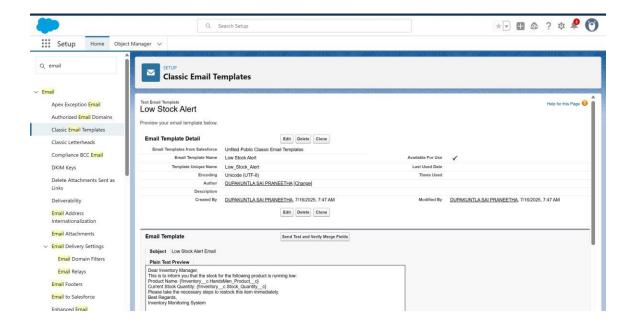
• **Order Confirmation Email Template:** A pre-designed email template automatically sent to customers after order placement, summarizing order details and confirming successful submission.



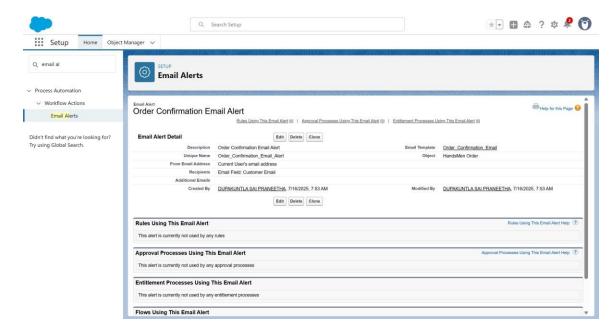
• **Loyalty Email Template:** An automated email template used to notify customers about their updated loyalty status, rewards, or exclusive offers based on their purchase history.



• Low stock Alert Email Template: An email template triggered when inventory levels fall below a defined threshold, notifying relevant managers to restock the product promptly

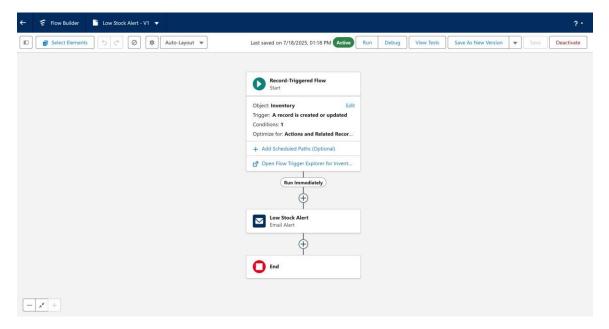


• **Email Alert** for **Order Confirmation Email:** A configured alert that triggers the Order Confirmation Email Template upon successful order creation, ensuring timely communication with customers.

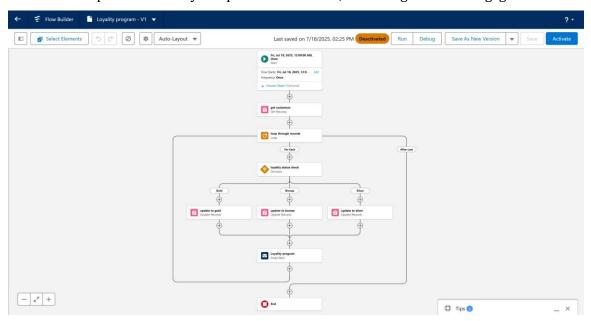


### **Flows**

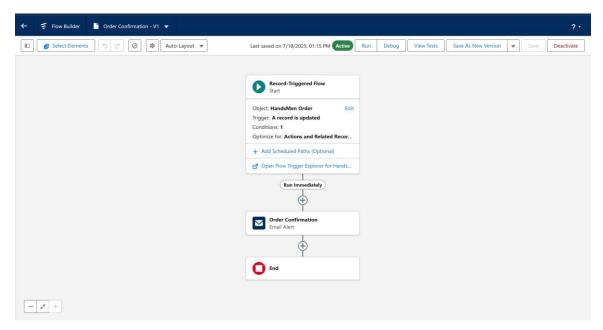
• Stock Alert Flow: Triggers alerts when inventory levels fall below a threshold.



• **Loyalty Status Flow**: An automated Salesforce Flow that updates a customer's loyalty tier based on their purchase history and predefined criteria, enhancing customer engagement.



• **Create Order Confirmation Email:** A Flow that generates and sends a confirmation email to customers immediately after an order is placed, ensuring real-time communication and transparency.

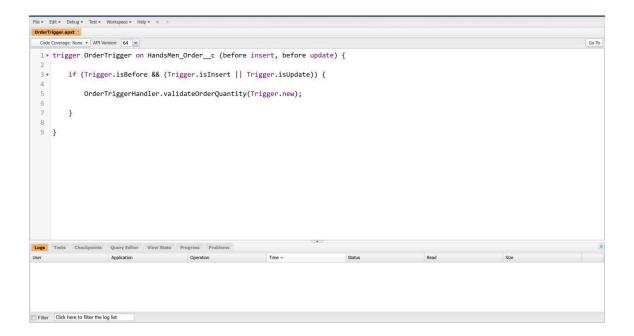


## **Automation using Apex**

• **OrderTriggerHandler Apex Class:** A reusable Apex class that encapsulates the business logic for order-related triggers, ensuring clean, modular, and maintainable automation.

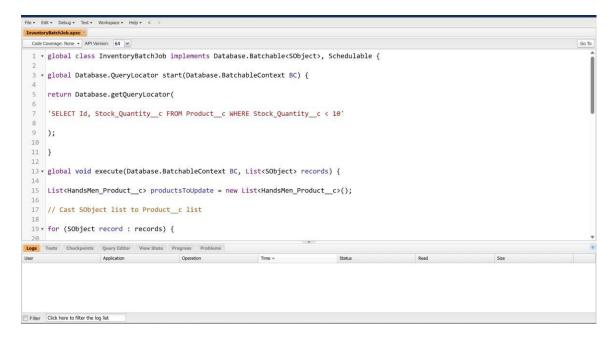
```
Code Coverage: None • API Version: 64 ×
  1 • public class OrderTriggerHandler {
          public static void validateOrderQuantity(List<HandsMen_Order__c> orderList) {
             for (HandsMen_Order__c order : orderList) {
                 if (order.Status_c == 'Confirmed') {
                     if (order.Quantity_c == null || order.Quantity_c <= 500) {</pre>
  10
  11
                           order.Quantity_c.addError('For Status "Confirmed", Quantity must be more than 500.');
 13
14
                      }
                  } else if (order.Status_c == 'Pending') {
                      if (order.Quantity_c == null || order.Quantity_c <= 200) {</pre>
 18
                           order.Quantity_c.addError('For Status "Pending", Quantity must be more than 200.');
 Logs Tests Checkpoints Query Editor View State Progress Problems
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OrderTrigger Apex Trigger: An Apex trigger on the HandsMen\_Order\_c object that invokes
the OrderTriggerHandler to automate actions like validation and email notifications during
order processing.



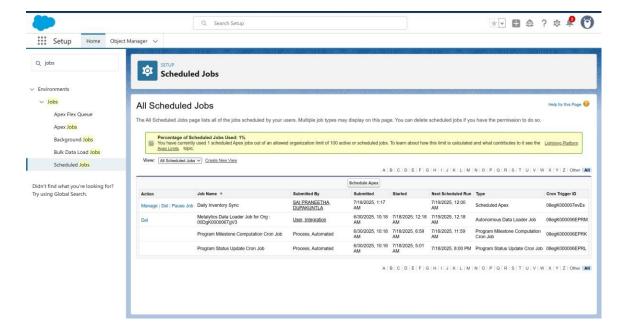
# **BatchJob**

**InventoryBatchJob:** An Apex batch job that processes inventory records in bulk to update stock statuses, perform audits, or trigger low stock alerts at scheduled intervals.



## Job

**Scheduled job:** A time-based Apex job that runs the InventoryBatchJob at defined intervals, automating inventory updates and ensuring up-to-date stock information.



# **GitHub Repository**

https://github.com/Praneetha719/HandsMen-Threads-Elevating-the-Art-of-Sophistication-in-Men-s-Fashion

### **Future Enhancements**

- Integrate NFC tags for real-time inventory tracking.
- Add AI-driven wardrobe suggestions based on user profiles and weather.
- Launch Meta Threads™: an augmented reality virtual closet.
- Implement Einstein Analytics for customer trend predictions.
- Provide VIP customer portal for booking stylist sessions.
- Enable WhatsApp/Instagram-based messaging for promotions.

### Conclusion

This Salesforce CRM for HandsMen Threads demonstrates a scalable, automated solution tailored for a high-end fashion brand. It successfully optimizes key operations through Apex, Flows, and declarative tools. The system can be extended with analytics, LWC components, and AI for next-gen CRM capabilities.