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

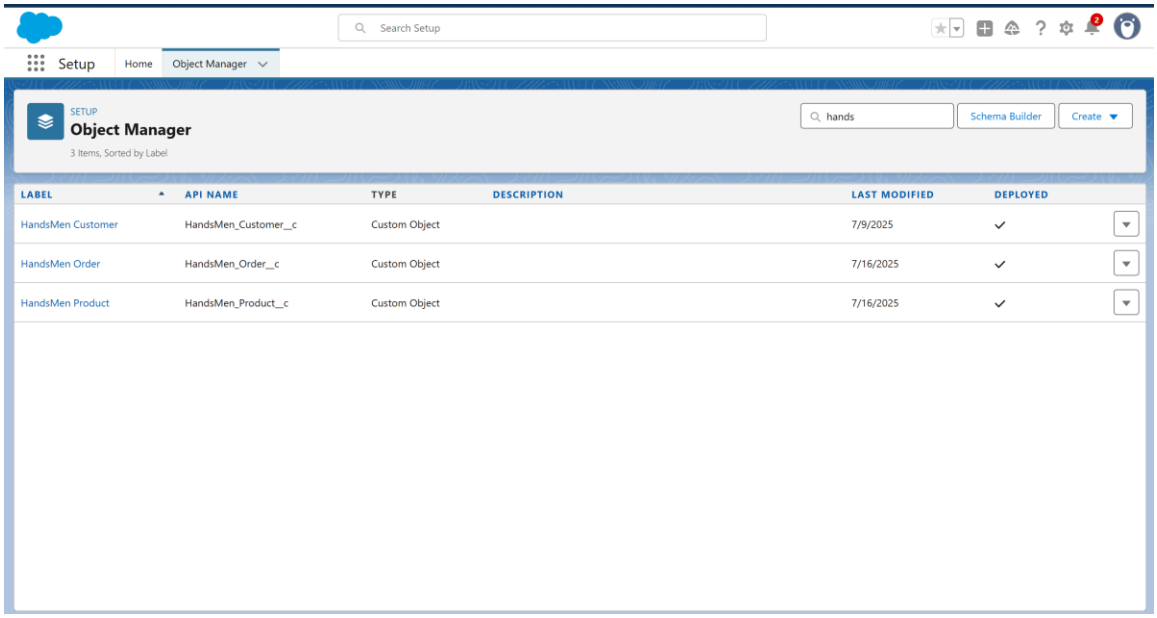
- Deployed metadata using Salesforce CLI and SFDX.
- Initialized version control with Git.
- Uploaded documentation and screenshots to GitHub.

Detailed Implementation & Configuration

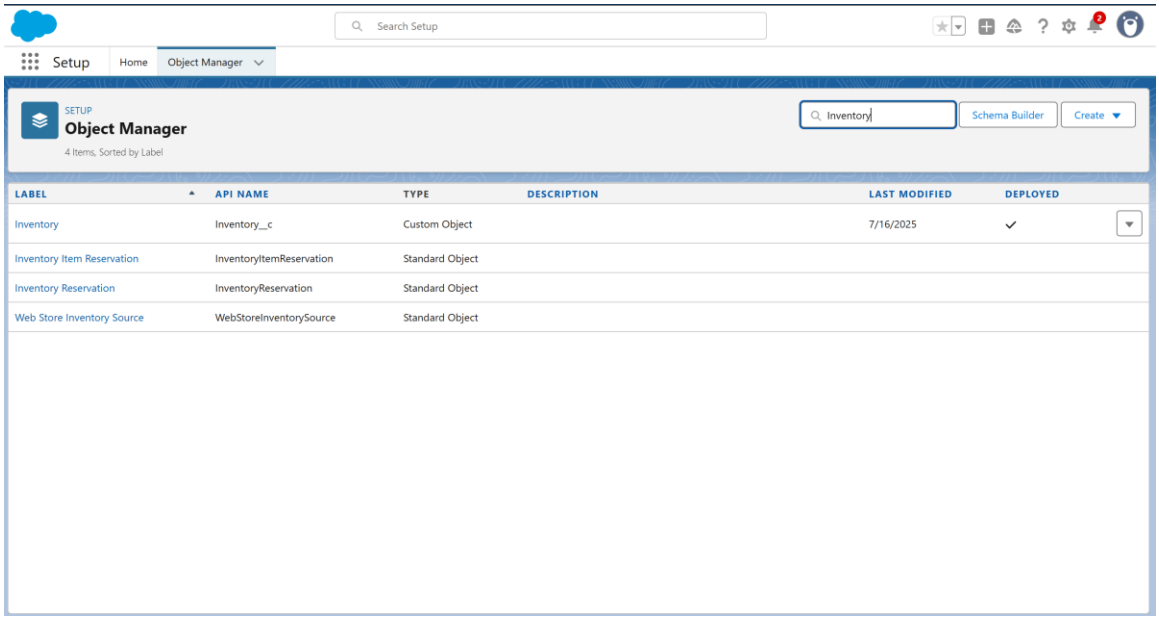
Data Management

Objects

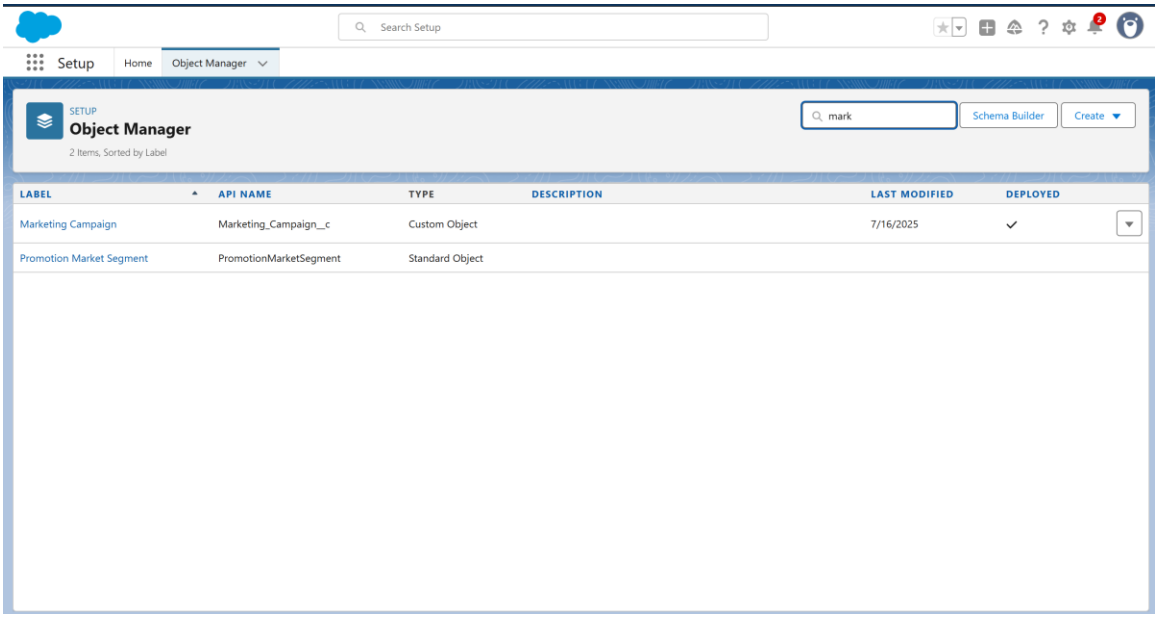
- **HandsMen_Customer__c**
- **HandsMen_Product__c**
- **HandsMen_Order__c**



- **Inventory__c**

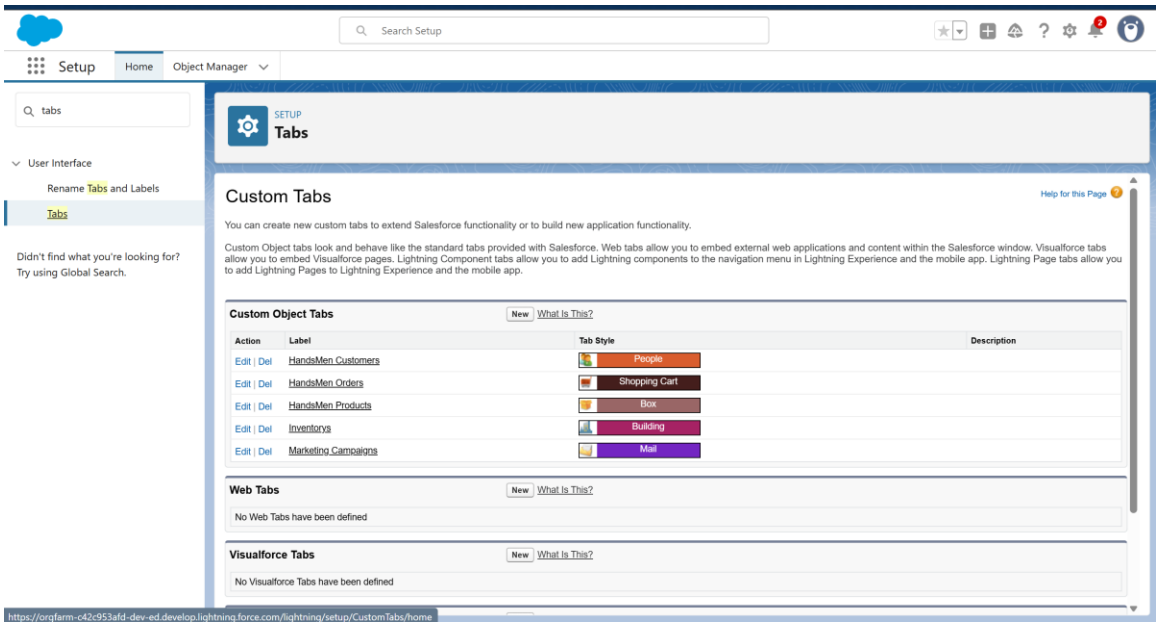


- **Marketing_Campaign__c**



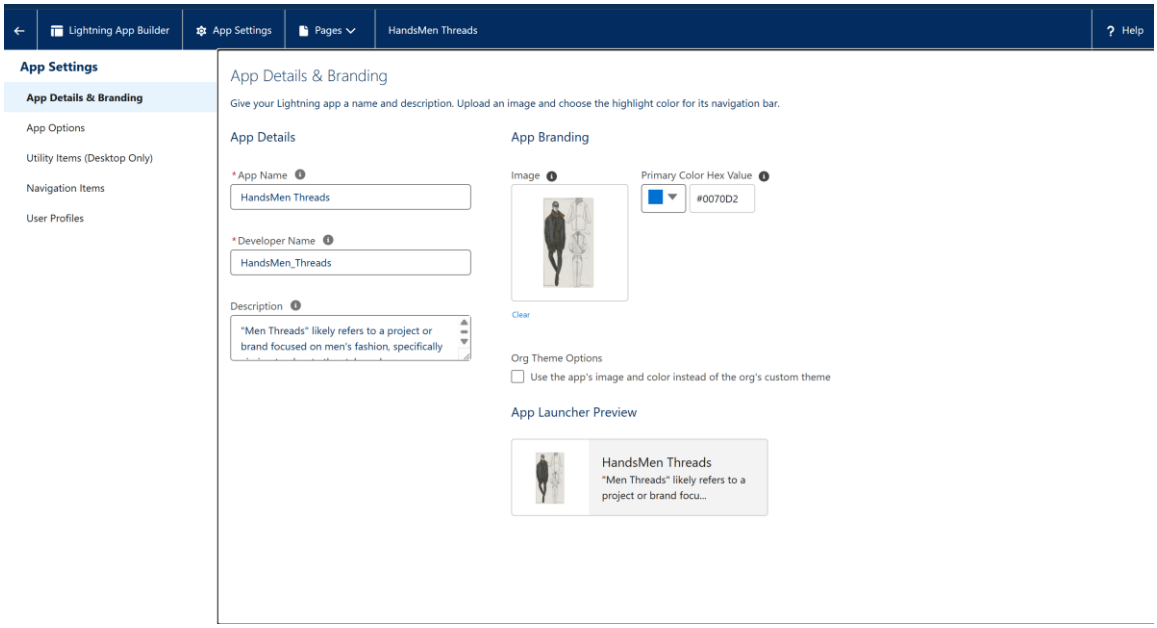
Tabs

- **Tab - HandsMen Customer**



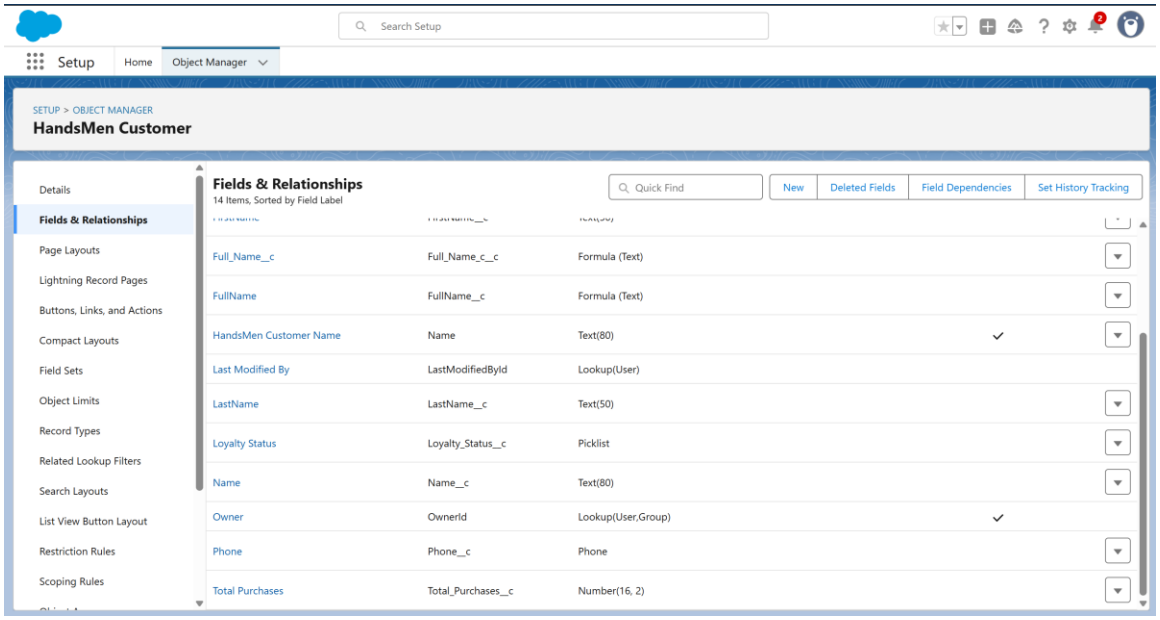
App Manager

- **App - HandsMen Threads**

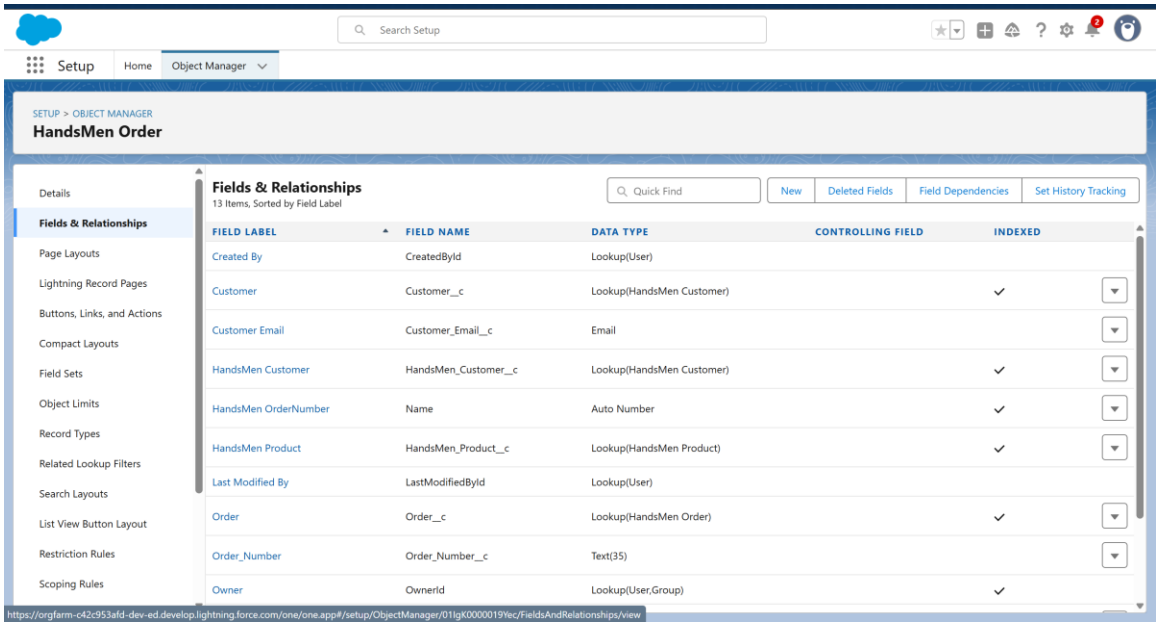


Fields

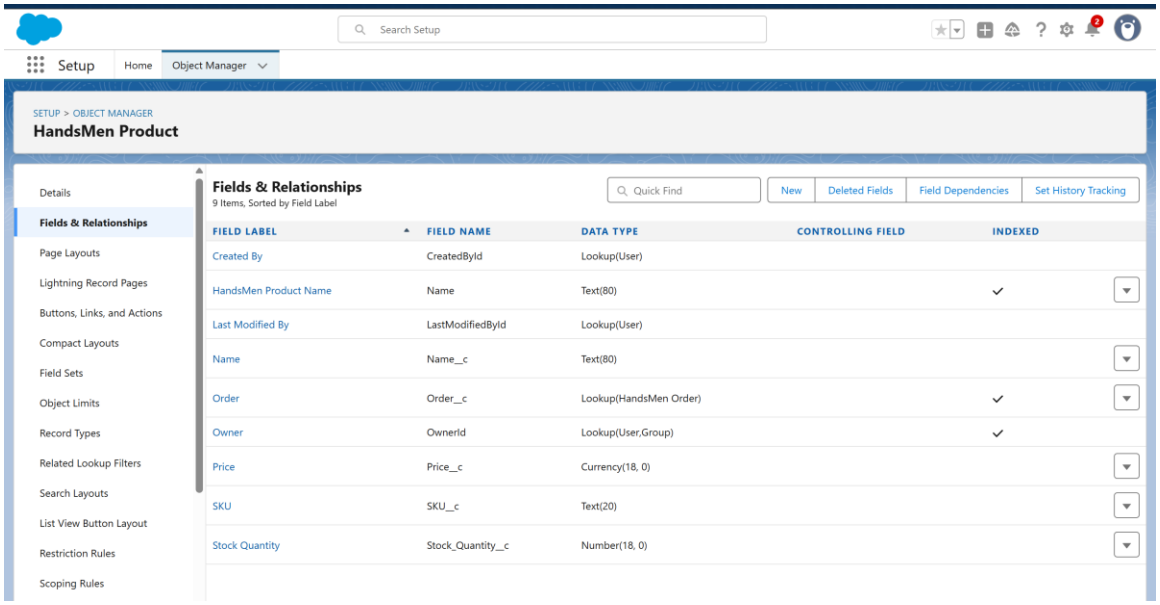
- **Fields -**HandsMen Customer



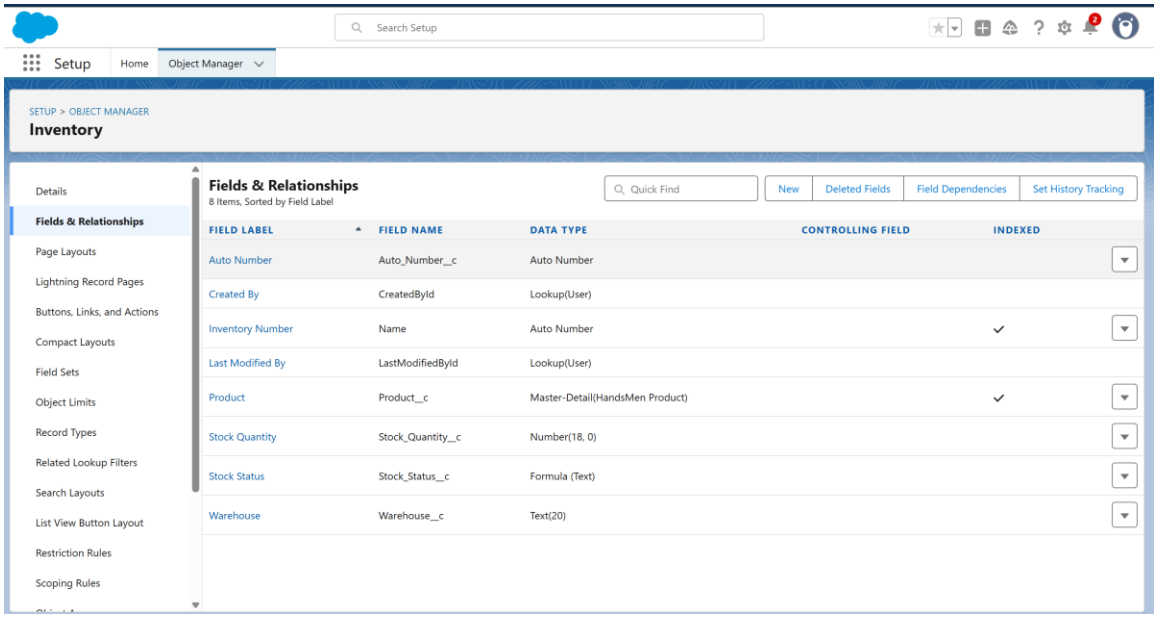
- **Fields -**HandsMen Order



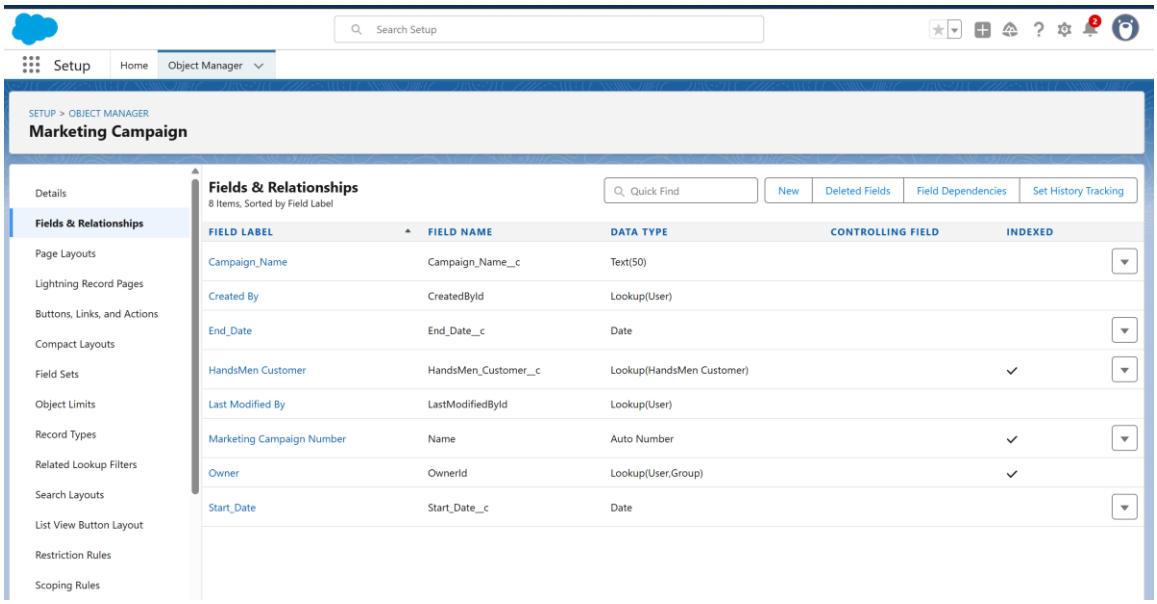
- **Fields-**HandsMen Product



- **Fields- Inventory**

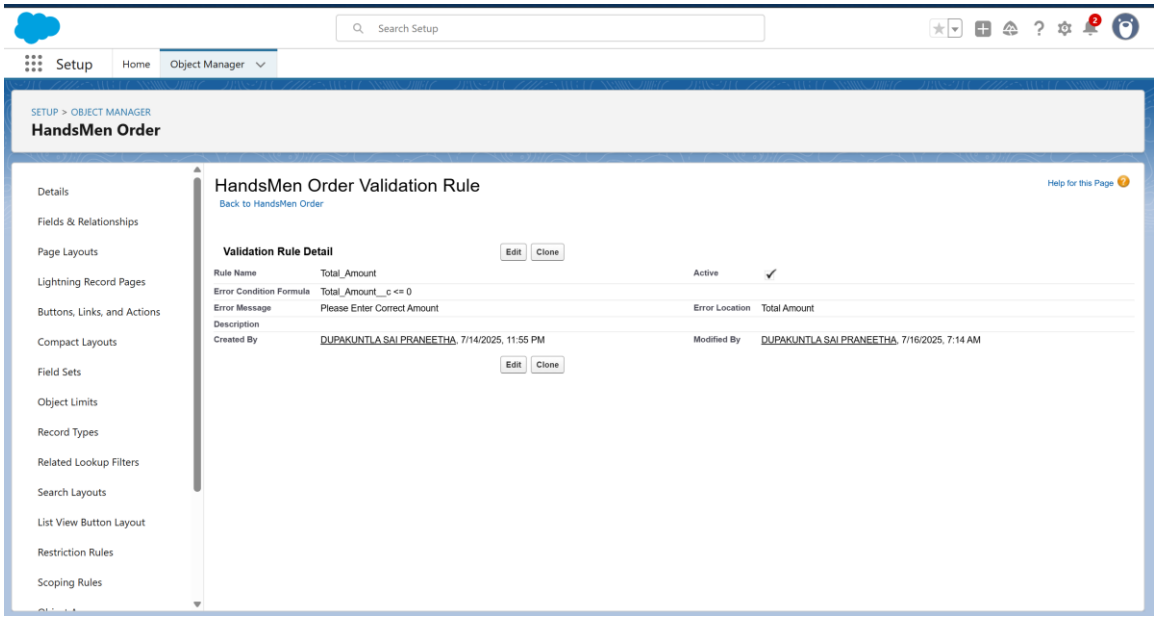


- **Fields- Marketing_Campaign**

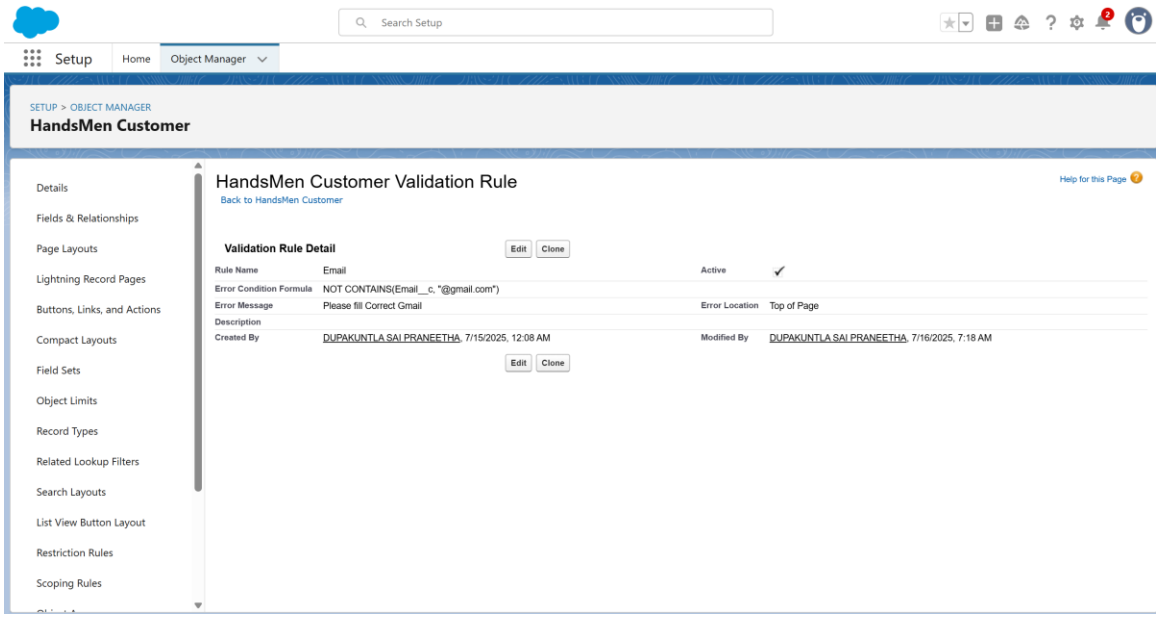


Data Configuration

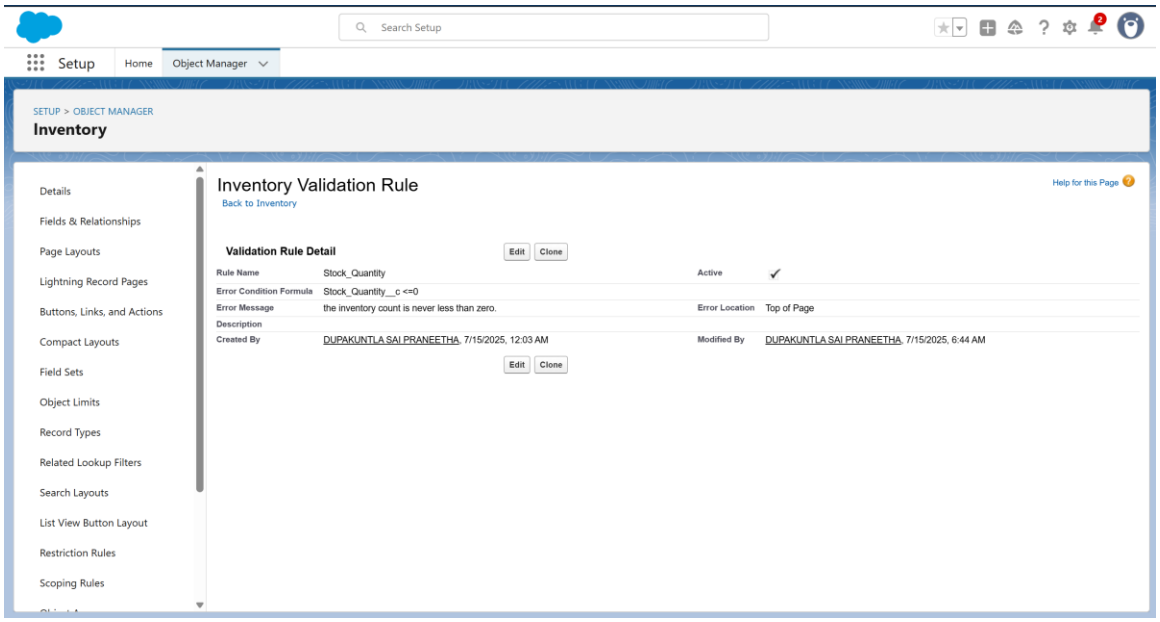
- **Validation Rules** - HandsMen Order



- **Validation Rules** - HandsMen Customer



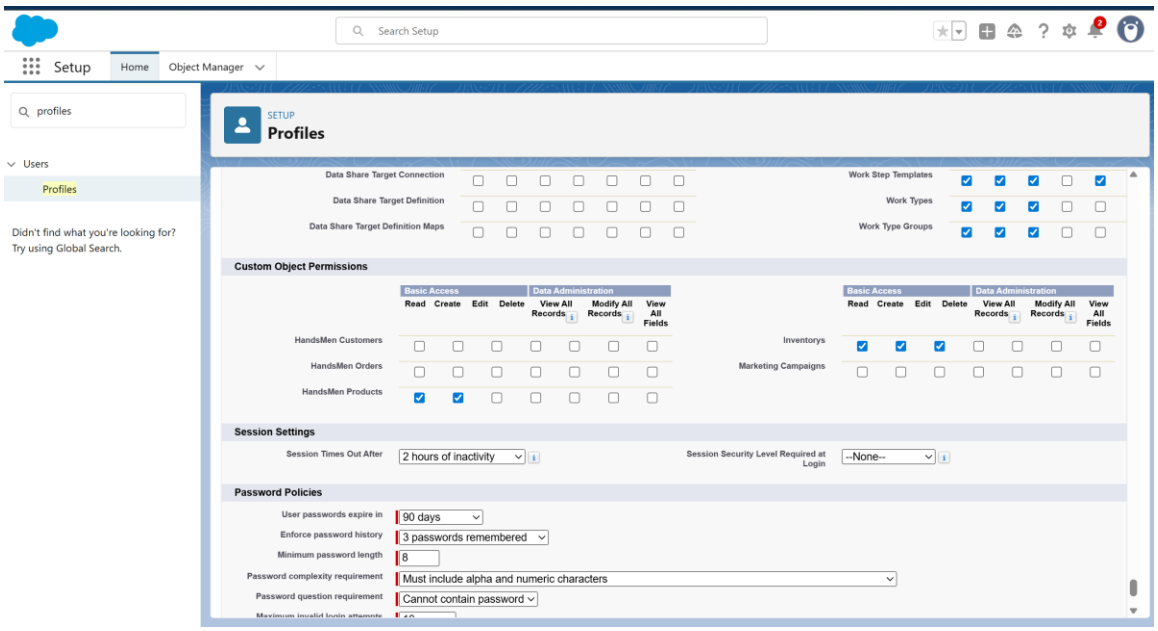
- **Validation Rules** – Inventory



Data Security

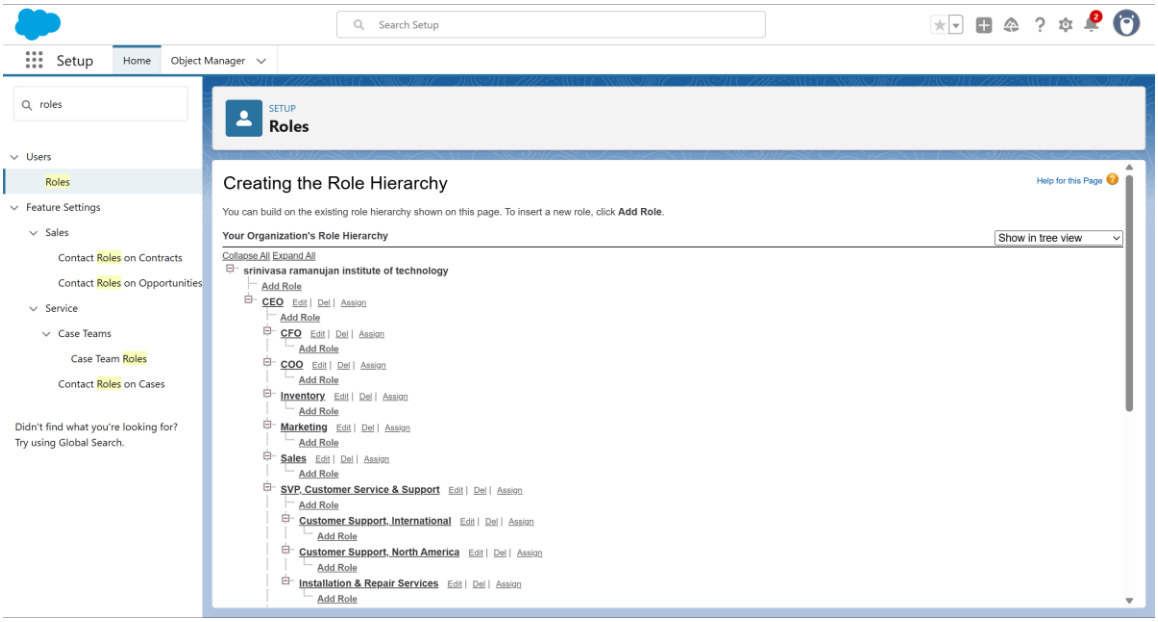
Profiles

- **Profile – Sales**



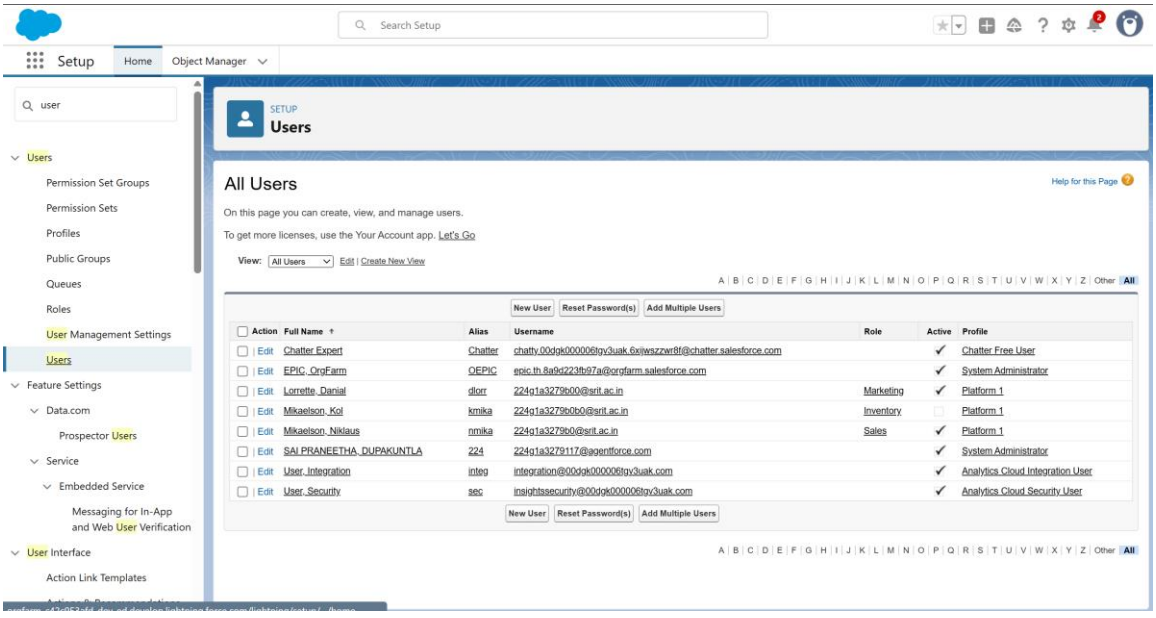
Roles

Role – Sales,Inventory Manager and **Marketing Manager**.



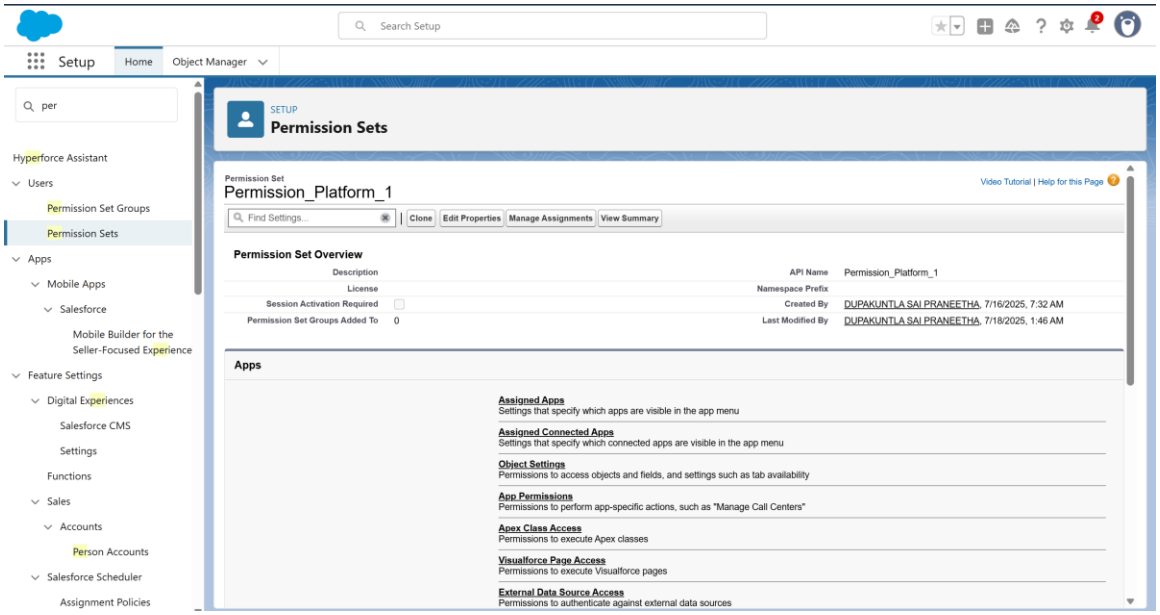
Users

- **User – Niklaus**, Kol, Lorretta Daniel



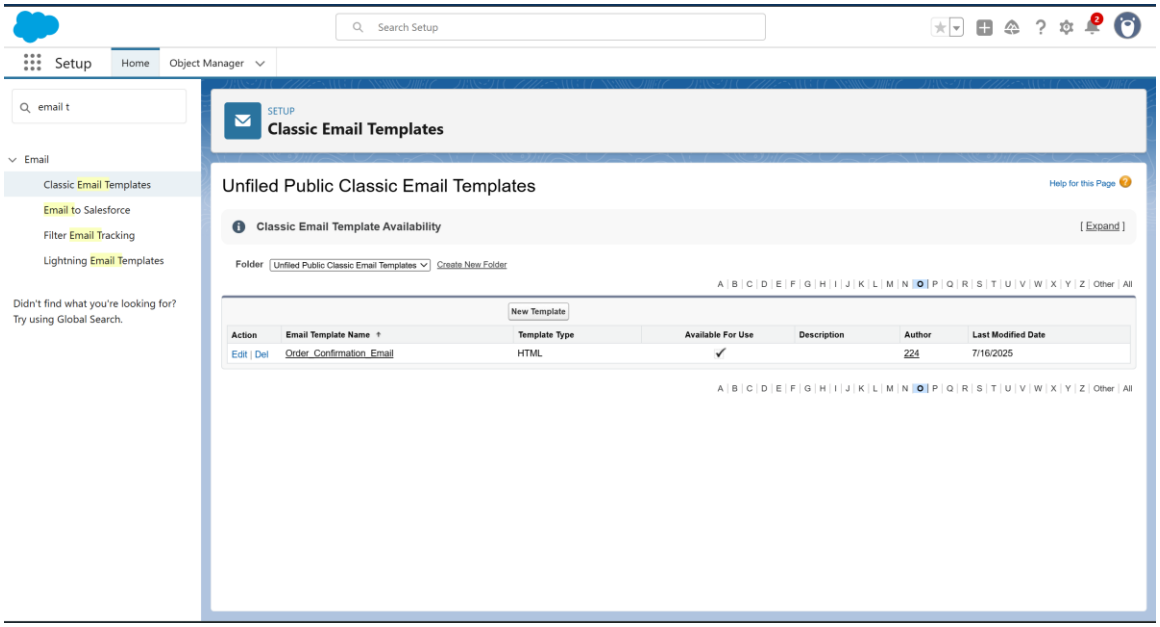
Permission Sets

- **Permission set - Permission_Platform_1** (Assigned for object-level security and specific permissions).

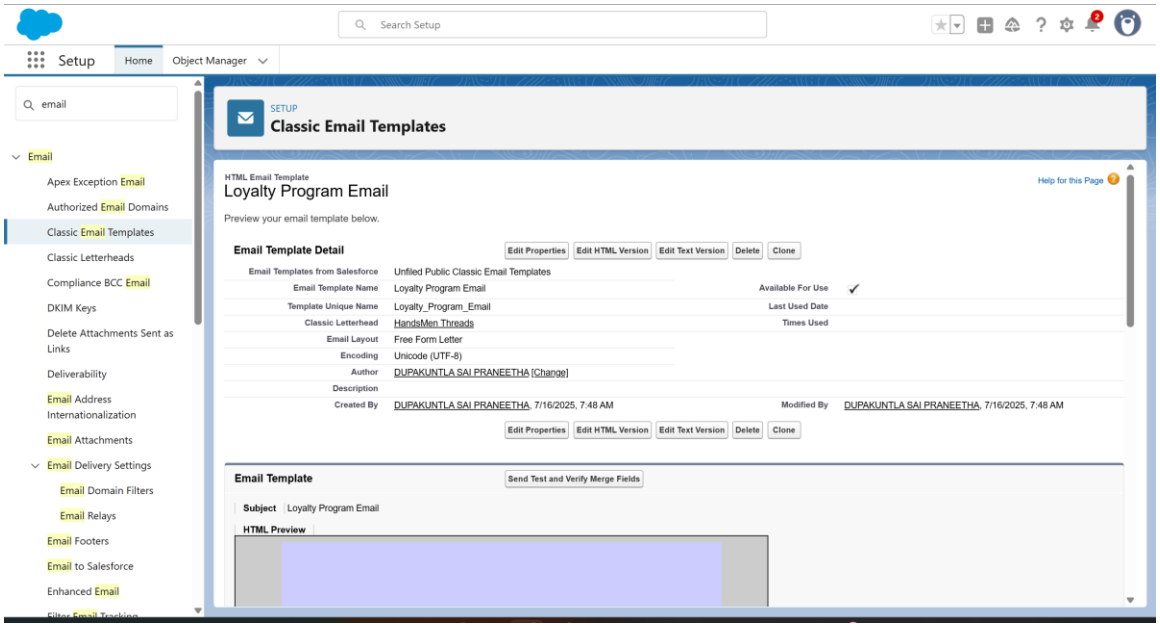


Email Templates & Alerts

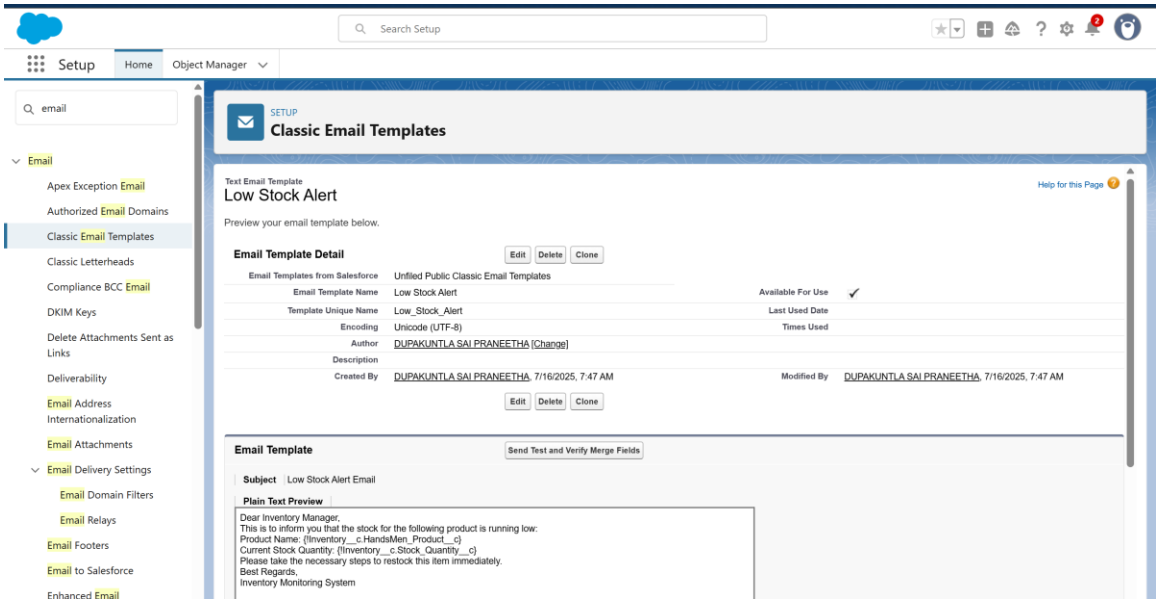
- **Order Confirmation Email Template**



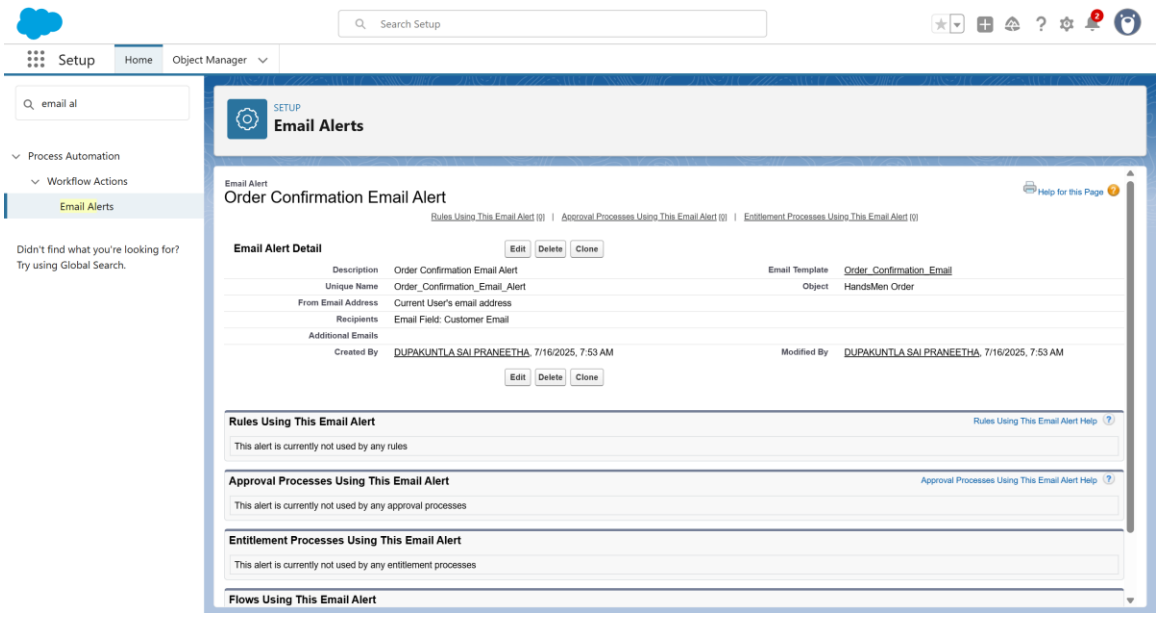
- **Loyalty Email Template**



- **Low stock Alert Email Template**

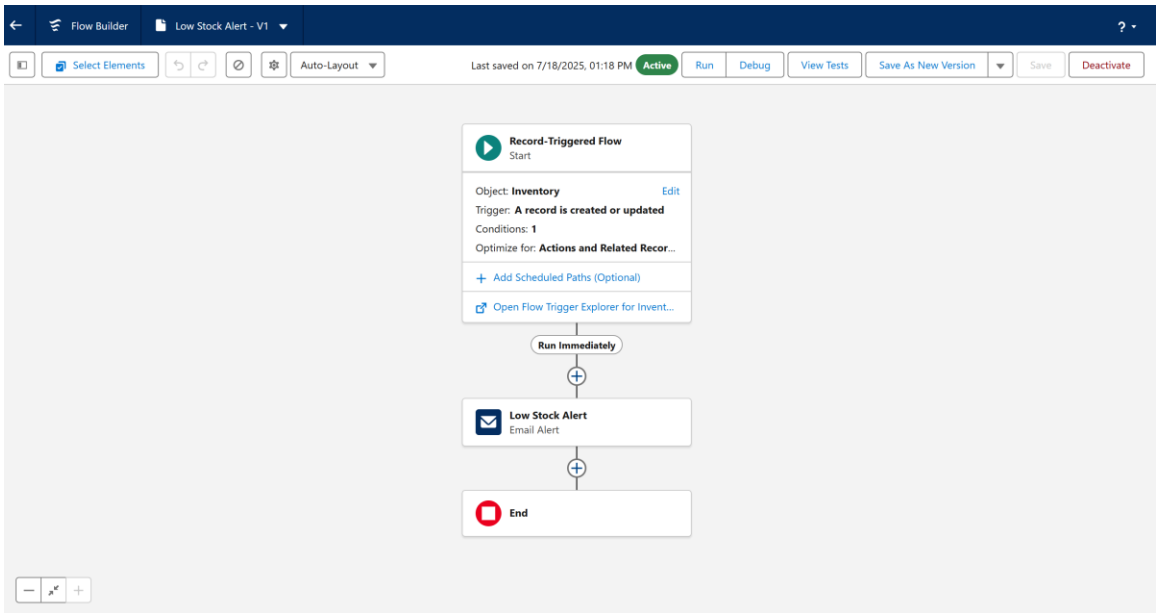


- **Email Alert** for **Order Confirmation Email**

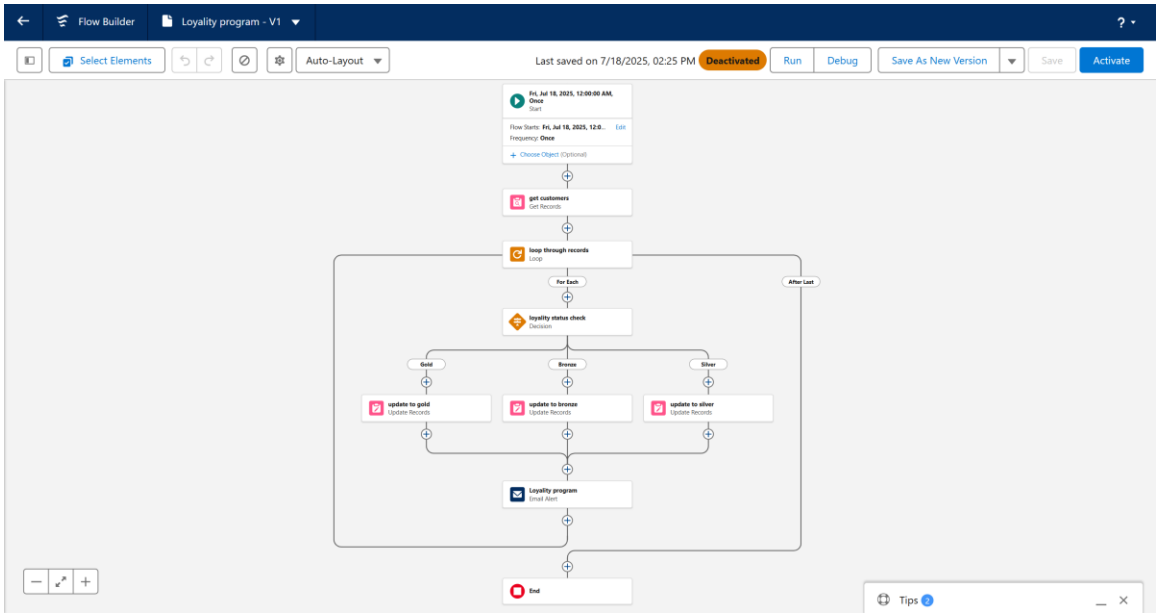


Flows

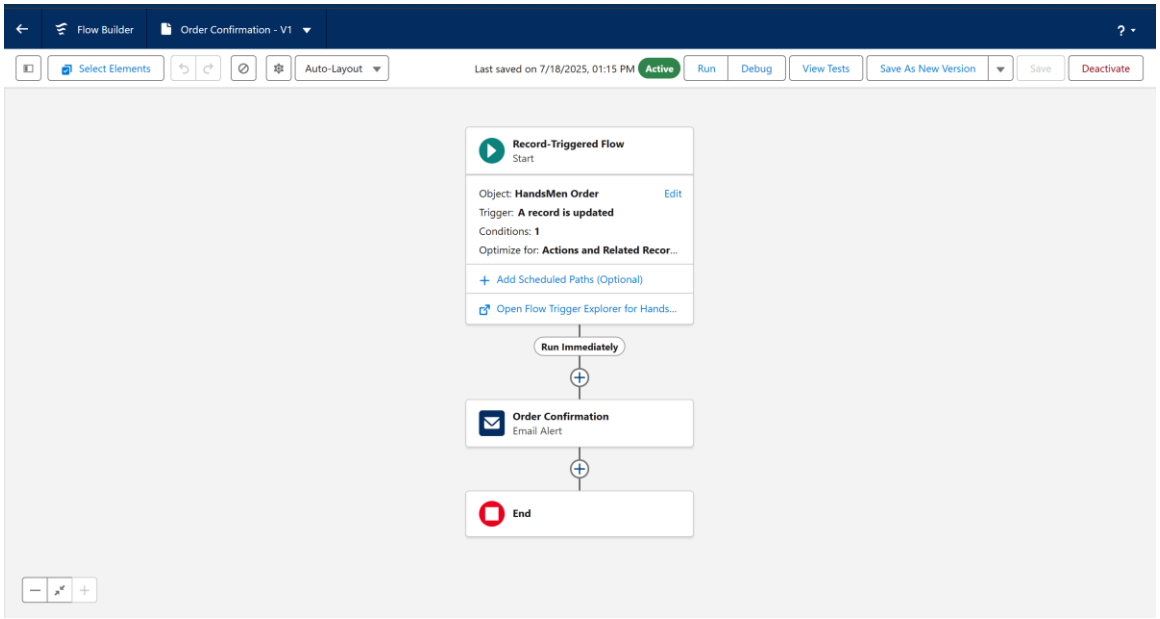
- **Stock Alert Flow**: Triggers alerts when inventory levels fall below a threshold.



- **Loyalty Status Flow**

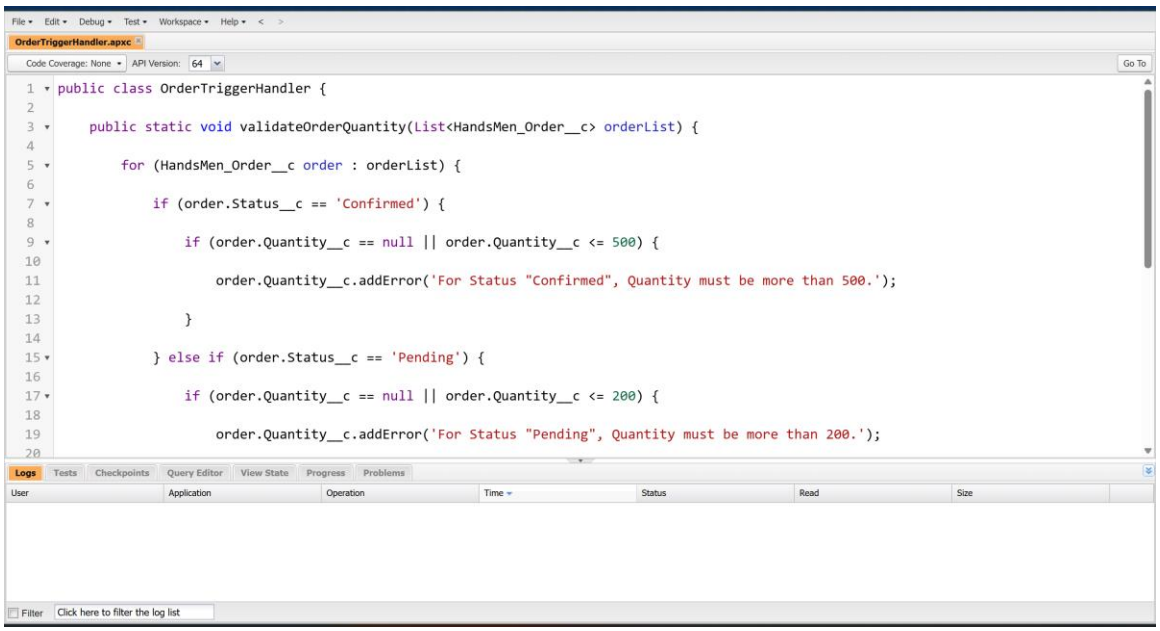


- **Create Order Confirmation Email**

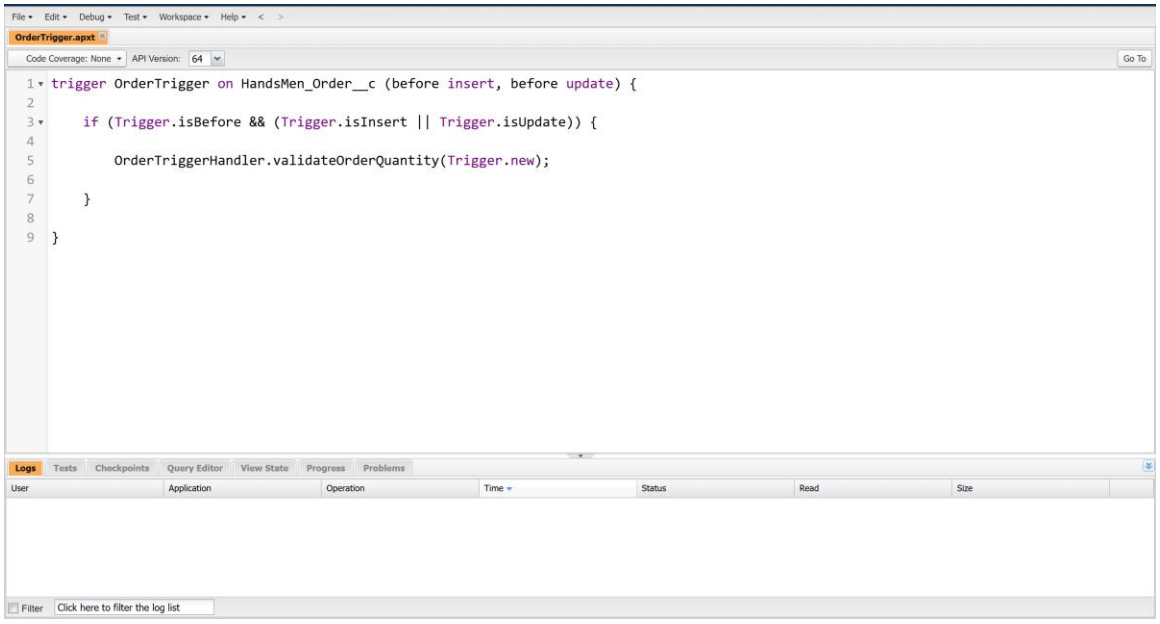


Automation using Apex

- **OrderTriggerHandler Apex Class**

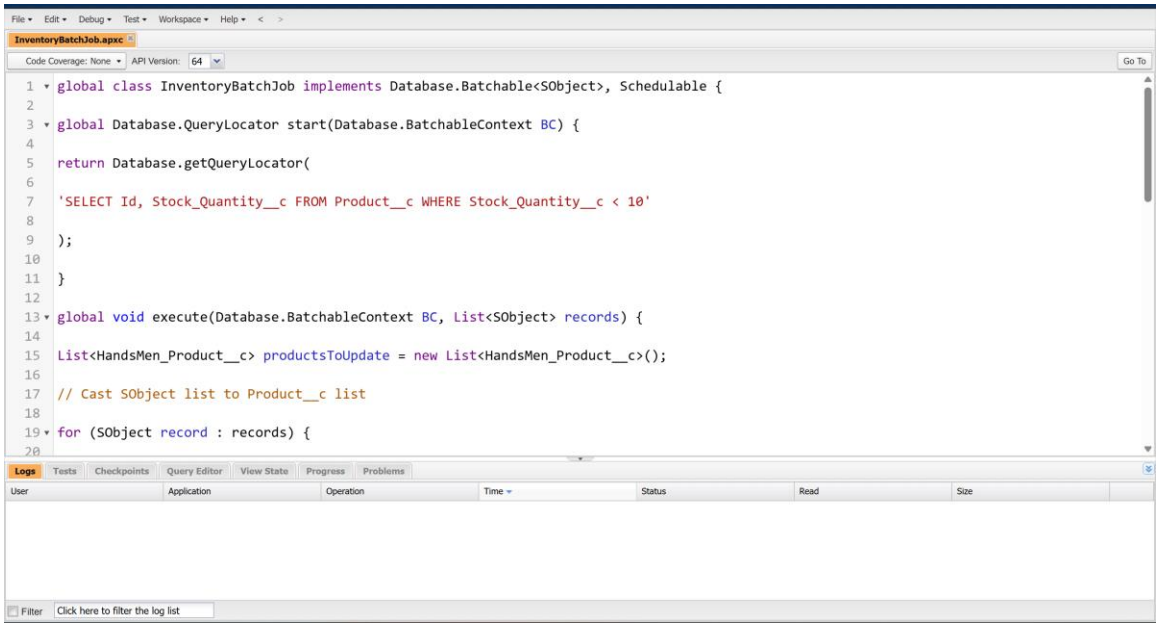


- **OrderTrigger Apex Trigger**



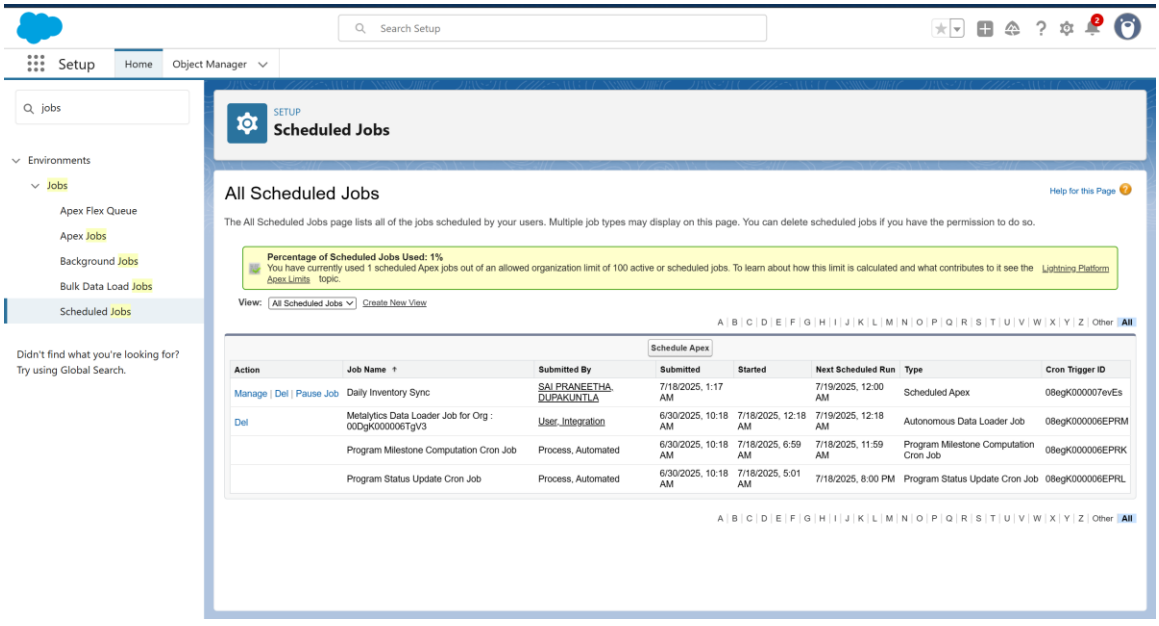
BatchJob

InventoryBatchJob



Job

Scheduled job



GitHub Repository

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

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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.