HandsMen Threads - Salesforce CRM Project

Use Case Overview:

HandsMen Threads, a modern tailoring brand in the fashion industry, is implementing a Salesforce CRM solution to enhance its data management and streamline customer relationship processes. This initiative focuses on creating a customized and integrated data model that supports efficient business operations and elevates customer experiences.

Project Objectives: - Build a robust Salesforce data model - Ensure data integrity and consistency through the UI - Automate customer communications and inventory processes - Leverage Salesforce tools for process automation and scalability

Core Functional Features:

1. **Automated Order Confirmations**
   o Sends confirmation emails post-order placement to customers automatically.
2. **Dynamic Loyalty Program**
   o Tracks purchase history and updates the customer loyalty status to trigger rewards.
3. **Proactive Stock Alerts**
   o Sends automatic alerts to the warehouse when stock levels fall below 5 units.
4. **Scheduled Bulk Order Updates**
   o Daily scheduled processing at midnight for bulk orders: adjusts inventory and financial records.

Skills & Tools You Will Learn: - Data Modeling - Data Quality Control - Lightning App Builder - Record Triggered Flows - Apex and Apex Triggers - Asynchronous Apex
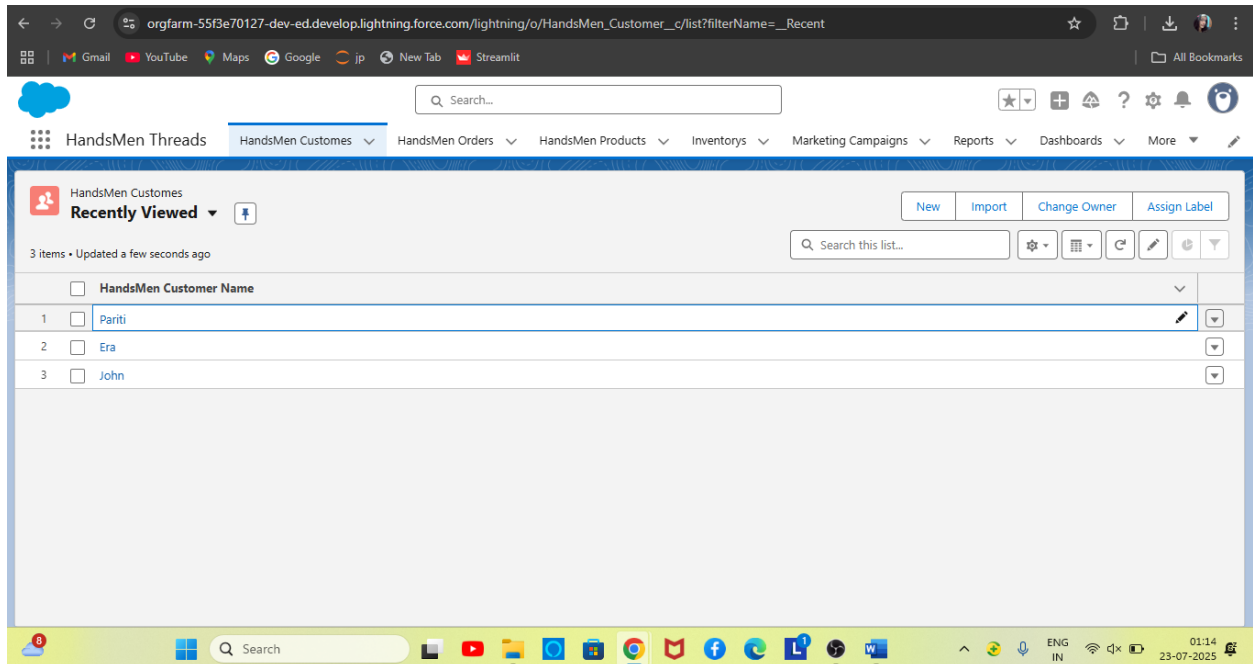
Data Management Setup:

Objects: - HandsMen Customer - HandsMen Product - HandsMen Order - Inventory - Marketing Campaign

Tabs: - HandsMen Customer (Custom Tab)

App Manager: - App Name: HandsMen Threads

Fields: - Email, Phone, Loyalty Status (with formula fields and lookup relationships) - All remaining fields as per business need

Validation Rules: - Created for maintaining data quality across custom objects

Data Security Configuration:

Profiles: - Sales Profile

Roles: - Role: Sales

Users: - User: Niklaus - User: Kol

Permission Sets: - Permission Set: Permission_Platform_1

Email Templates & Alerts: - Order Confirmation Email Template - Stock Alert Email Template - Other transactional templates as needed - Email Alerts configured for flows

Your Order has been Confirmed! `Spam ×`

Sangita Khetwal via jwtocf8pxsax.gl-785hquai.can98.bnc.salesforce.com
to me ▾

Tue 22 Jul, 18:38 (6 hours ago) ☆

Why is this message in spam? This message is similar to messages that were identified as spam in the past.

[Report as not spam]

Dear Pariti,

Your order #O-0007 has been confirmed!

Thank you for shopping with us.

Best Regards,

Sales Team

≡ **M** Gmail   🔍 in:spam   ✕ 🎛

←   Delete forever   Not spam   ✉ 🗂 ⋮

✏ Compose

Low Stock Alert Email `Spam ×`   🖨 ↗

📥 Inbox   2,532
⭐ Starred
🕐 Snoozed
▷ Sent
📄 Drafts   31
⌃ Less
📨 Important
💬 Chats
📤 Scheduled
📩 All Mail
ⓘ **Spam**
🗑 Bin
▸ ▢ Categories
✉ Manage subscriptions

Sangita Khetwal via mqi5otdp8zjmiy.gl-785hquai.can98.bnc.salesforce.com
to me ▾

Tue 22 Jul, 18:41 (6 hours ago) ☆ ☺ ↩ ⋮

Why is this message in spam? This message is similar to messages that were identified as spam in the past.

[Report as not spam]   ⓘ

Dear Inventory Manager,
This is to inform you that the stock for the following product is running low:
Product Name: Shirt
Current Stock Quantity: 3
Please take the necessary steps to restock this item immediately.
Best Regards,
Inventory Monitoring System

↩ Reply   ↪ Forward

≡ **M** Gmail   🔍 in:spam   ✕ 🎛

←   Delete forever   Not spam   ✉ 🗂 ⋮

✏ Compose

Loyalty Program Email `Spam ×`   🖨 ↗

📥 Inbox   2,532
⭐ Starred
🕐 Snoozed
▷ Sent
📄 Drafts   31
⌃ Less
📨 Important
💬 Chats
📤 Scheduled
📩 All Mail
ⓘ **Spam**
🗑 Bin
▸ ▢ Categories
📧 Manage subscriptions
⚙ Manage labels
➕ Create new label

OrgFarm EPIC <epic.orgfarm@salesforce.com>
to me ▾

Tue 22 Jul, 18:44 (6 hours ago) ☆ ☺ ↩ ⋮

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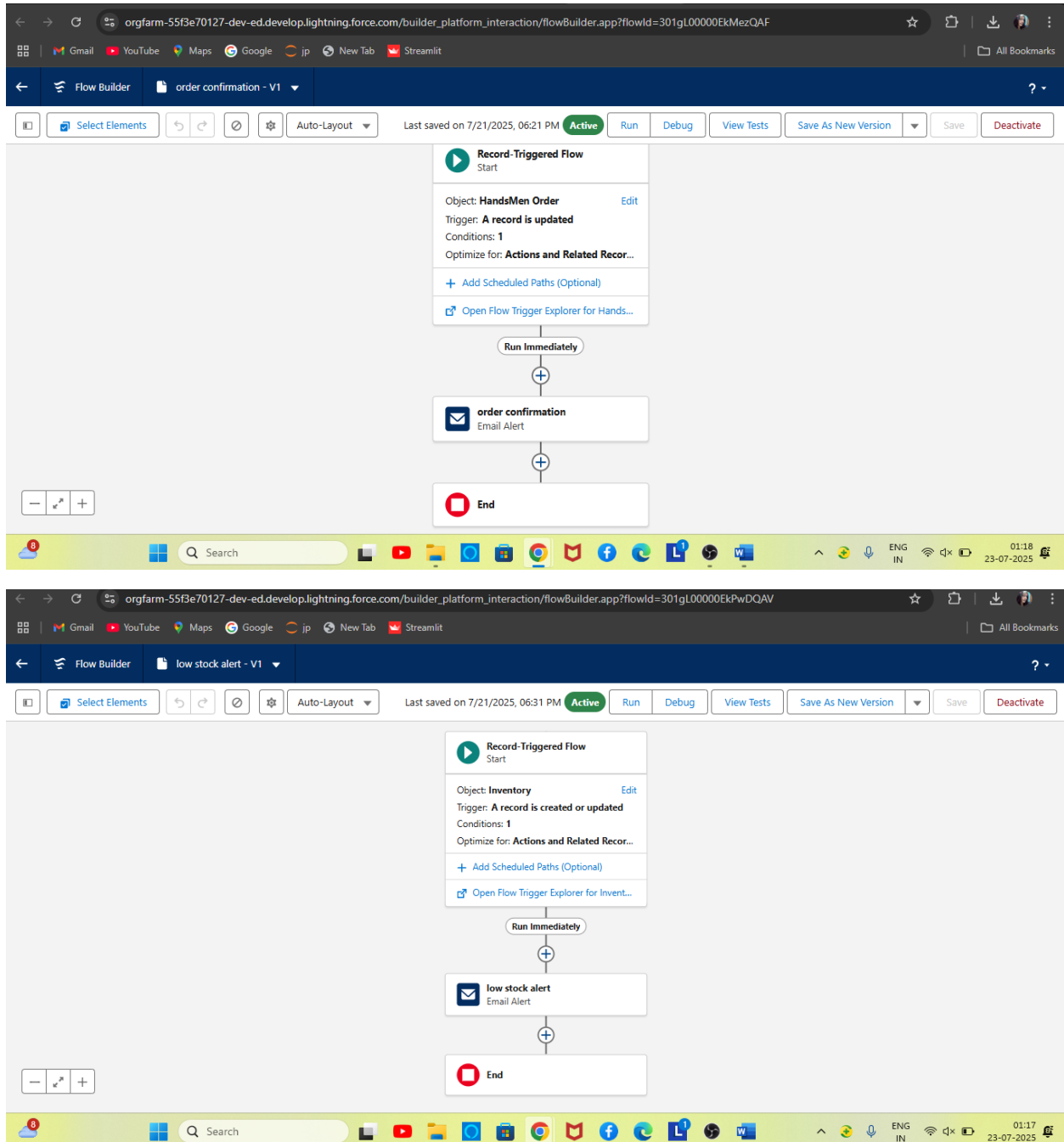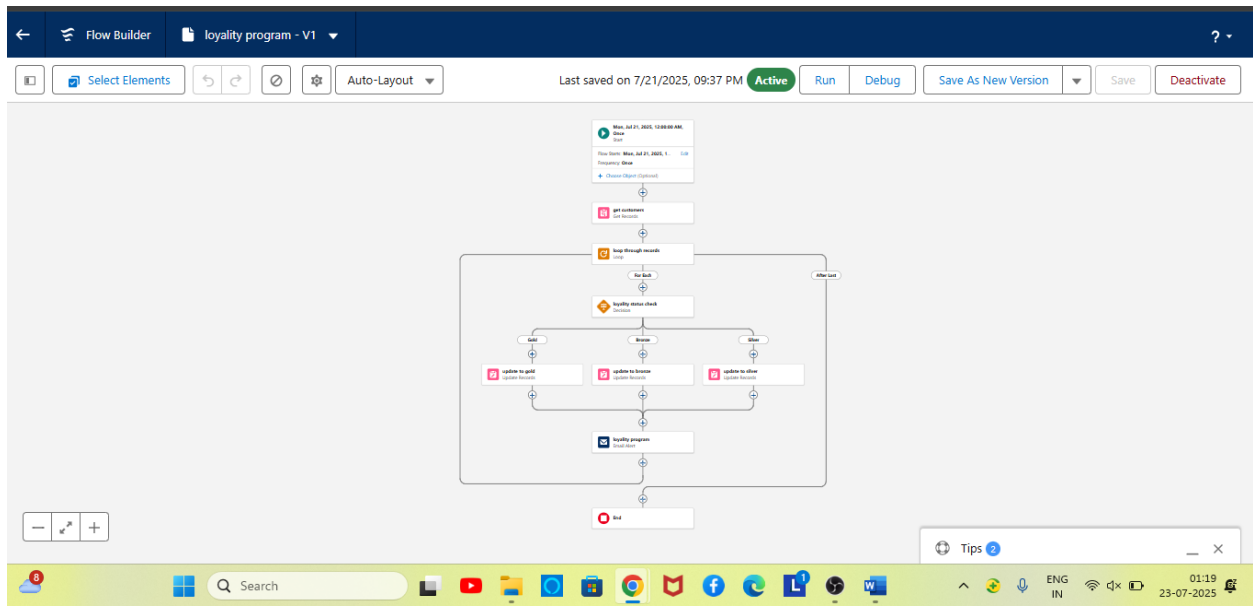
[Report as not spam]   ⓘ

Congratulations! You are now a Bronze member and you are eligible
for our Loyalty Rewards Program.
Enjoy exclusive discounts, early access to offers, and special member
benefits.
Thank you for your continued Support.

Labels   +

ⓘ Upgrade   →

Flow Automation: - Record-Triggered Flow: Order Confirmation Email - Record-Triggered Flow: Stock Alert Email - Scheduled Flow: Bulk Order Update (Runs Daily at Midnight)

Apex Automation: - Apex Class for custom logic - Batch Apex Jobs for scheduled and bulk processing


```
1 ▼ trigger OrderTotalTrigger on HandsMen_Order__c (before insert, before update) {
2       Set<Id> productIds = new Set<Id>();
3
4 ▼     for (HandsMen_Order__c order : Trigger.new) {
5 ▼         if (order.HandsMen_Product__c != null) {
6               productIds.add(order.HandsMen_Product__c);
7           }
8       }
9
10      Map<Id, HandsMen_Product__c> productMap = new Map<Id, HandsMen_Product__c>(
11          [SELECT Id, Price__c FROM HandsMen_Product__c WHERE Id IN :productIds]
12      );
13
```

File ▾   Edit ▾   Debug ▾   Test ▾   Workspace ▾   Help ▾   <   >

OrderTotalTrigger.apxt ⊠   **StockDeductionTrigger.apxt** ⊠

Code Coverage: None ▾   API Version: 64 ▾   Go To

```apex
trigger StockDeductionTrigger on HandsMen_Order__c (after insert, after update) {
    Set<Id> productIds = new Set<Id>();

    for (HandsMen_Order__c order : Trigger.new) {
        if (order.Status__c == 'Confirmed' && order.HandsMen_Product__c != null) {
            productIds.add(order.HandsMen_Product__c);
        }
    }

    if (productIds.isEmpty()) return;

    // Query related inventories based on product
    Map<Id, Inventory__c> inventoryMap = new Map<Id, Inventory__c>(
```

Logs   Tests   Checkpoints   Query Editor   View State   Progress   Problems

User	Application	Operation	Time ▾	Status	Read	Size

Conclusion: This Salesforce CRM project for HandsMen Threads not only improves operational efficiency but also enhances customer engagement and ensures high-quality data management, setting the foundation for scalable business growth.