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

# 1. Introduction

HandsMen Threads is a luxury men's fashion brand known for its classic and contemporary clothing. In response to increasing operational complexity and the need for better customer engagement, the company initiated a Salesforce-based digital transformation project.

The goal is to build a scalable, efficient CRM that provides real-time automation, improves data consistency, and empowers the sales, inventory, and support teams to deliver better customer experiences.

# 2. Objective

- Build a Salesforce CRM application tailored to fashion retail operations.

- Ensure centralized, structured data management for customers, orders, and inventory.

- Automate repetitive manual tasks to reduce human errors.

- Establish clear security roles for users and data accessibility.

- Provide meaningful customer insights through dashboards and reports.

- Strengthen loyalty programs and inventory management with automation.

# 3. Use Case Overview

\*\*Automated Order Confirmations:\*\* Automatically send confirmation emails post-purchase.

\*\*Loyalty Program Management:\*\* Automatically upgrade loyalty status based on total order value.

\*\*Inventory Stock Alerts:\*\* Send email to warehouse when stock level falls below threshold.

\*\*Bulk Order Processing:\*\* Schedule Apex job daily at midnight to process bulk orders and adjust inventory.

\*\*Customer Support Optimization:\*\* Allow easy access to customer data to resolve issues faster.

# 4. Tools and Technologies Used

- Salesforce CRM (Lightning Experience)

- Salesforce Apex (Triggers, Batch Apex)

- Record-Triggered & Scheduled Flows

- Lightning App Builder

- Custom Objects and Fields

- Email Templates

- Validation Rules and Formula Fields

# 5. System Requirements

\*\*Operating System:\*\* Windows 10/11, macOS (Latest), ChromeOS (Web Access)

\*\*RAM:\*\* Minimum 4GB (8GB recommended)

\*\*Processor:\*\* Intel Core i3 or better

\*\*Internet:\*\* Stable broadband, 30 Mbps minimum

\*\*Browser:\*\* Chrome, Firefox, Safari, Edge (Latest)

\*\*Other:\*\* No VPN or firewall blocking Salesforce domains (.salesforce.com, .force.com)

# 6. Data Model

- Customer\_\_c (Name, Email, Phone, Loyalty\_Status\_\_c, Address)

- Order\_\_c (Order\_Date, Status, Total\_Amount, Lookup to Customer\_\_c)

- Inventory\_\_c (Product\_Name, Category, Available\_Stock, Reorder\_Level)

- Loyalty\_History\_\_c (Points, Tier, Last\_Updated, Lookup to Customer\_\_c)

# 7. Tasks Completed

\*\*Data Modeling:\*\* Defined custom objects and relationships.

\*\*Field Creation:\*\* Added fields including Lookups, Picklists, Dates, Numbers.

\*\*Tabs Setup:\*\* Made all custom objects visible via App Manager.

\*\*Profiles Configuration:\*\* Restricted access per user role (Admin, Sales, Warehouse).

\*\*Roles Setup:\*\* Created hierarchical role structure for team leads, sales reps, etc.

\*\*User Setup:\*\* Created user records and associated roles, profiles.

\*\*Permission Sets:\*\* Configured permission sets for Apex class and flow execution.

\*\*Email Template Creation:\*\* Created templates for order confirmation, stock alert, loyalty tier.

\*\*Validation Rules:\*\* Added rules to prevent saving incomplete order records.

\*\*Record-Triggered Flow:\*\* Sends confirmation email after an order is placed.

\*\*Scheduled Flow:\*\* Executes at midnight to update bulk orders and inventory.

\*\*Apex Trigger:\*\* Updates customer loyalty status after order is placed.

\*\*Batch Apex Job:\*\* Periodically updates loyalty points for customers with large data.

\*\*Inventory Alert Flow:\*\* Sends an email when available stock is less than 5.

\*\*Lightning App Builder:\*\* Built ‘HandsMen Console’ app with tabs and customized pages.

\*\*Formula Fields:\*\* Auto-calculated fields like Order Age, Loyalty Points from Total Spend.

\*\*Reports and Dashboards:\*\* Sales Summary, Low Stock Alerts, Loyalty Status Summary.

# 8. Email Templates

- Order Confirmation: Personalized using {!Order\_\_c.Name}, {!Customer\_\_c.Email}

- Stock Alert: Sent to Warehouse Manager with product details

- Loyalty Upgrade: Notifies customer about new tier and benefits

# 9. Automation Summary

- Record-Triggered Flow: Order confirmation email.

- Scheduled Flow: Daily financial update and inventory sync.

- Apex Trigger: Loyalty program logic post-order.

- Batch Apex: Handles high-volume customer updates.

- Inventory Alert Flow: Detects low stock conditions and sends email.

# 10. Lightning App Setup

- App Name: HandsMen Console

- Tabs: Customers, Orders, Inventory, Loyalty History

- Record Page: Customized with related lists and quick actions

- Home Page: Includes KPIs for Sales and Inventory

# 11. Deployment & Demo

- Demo Video: [Insert YouTube or Drive Link]

- GitHub Repository: [Insert GitHub Repo Link with README and Metadata]

# 12. Learning Outcomes

- Real-time Flow and Apex automation understanding

- Salesforce Data Model creation and optimization

- Role, Profile, and Permission set distinction

- Hands-on with Lightning App Builder

- Efficient debugging of flows and apex logic

- Batch job design for large data volumes

# 13. Future Enhancements

- REST API integration for external order source

- SMS notifications integration using Twilio

- Dashboard filters by date, status, location

- Loyalty downgrade logic for inactive customers

- Role-based dashboard views

# 14. Conclusion

The HandsMen Threads Salesforce project marks a strategic move toward digital transformation. The complete CRM solution streamlines order management, enhances customer engagement, and ensures inventory accuracy. With automation and a secure data model in place, the organization is well-positioned to scale operations and provide an exceptional customer experience.