

Project Abstract: HandsMen Threads - Elevating the Art of Sophistication in Men's Fashion

Project Abstract:

Overview:

HandsMen Threads is a Salesforce CRM solution crafted for managing men's fashion orders, inventory, and customer loyalty. It offers real-time visibility, automated workflows, and centralized data to support efficient sales and inventory processes.

Core Modules Implemented:

1. **HandsMen Orders Management:**
Custom fields track product, customer, quantity, total, and status. A record-triggered flow sends order confirmation emails automatically upon order creation.
2. **Inventory Monitoring:**
Inventory records store product stock levels. A flow triggers a low-stock email alert to the inventory manager, ensuring timely restocking and uninterrupted supply.
3. **Product Information Management:**
Products include name, SKU, price, and stock quantity. They're linked to orders and inventory for traceability and accuracy.
4. **Customer Loyalty Program:**
Based on purchase totals, customers are categorized into Bronze, Silver, or Gold. A scheduled flow updates loyalty status and sends personalized emails, improving engagement and retention.
5. **Automation Using Salesforce Flows:**
 - **Order Confirmation Flow:** Sends an email when an order is placed.
 - **Low Stock Alert Flow:** Notifies inventory manager when stock is low.
 - **Loyalty Program Flow:** Loops through customer records, updates loyalty status, and sends loyalty emails.

Email Templates:

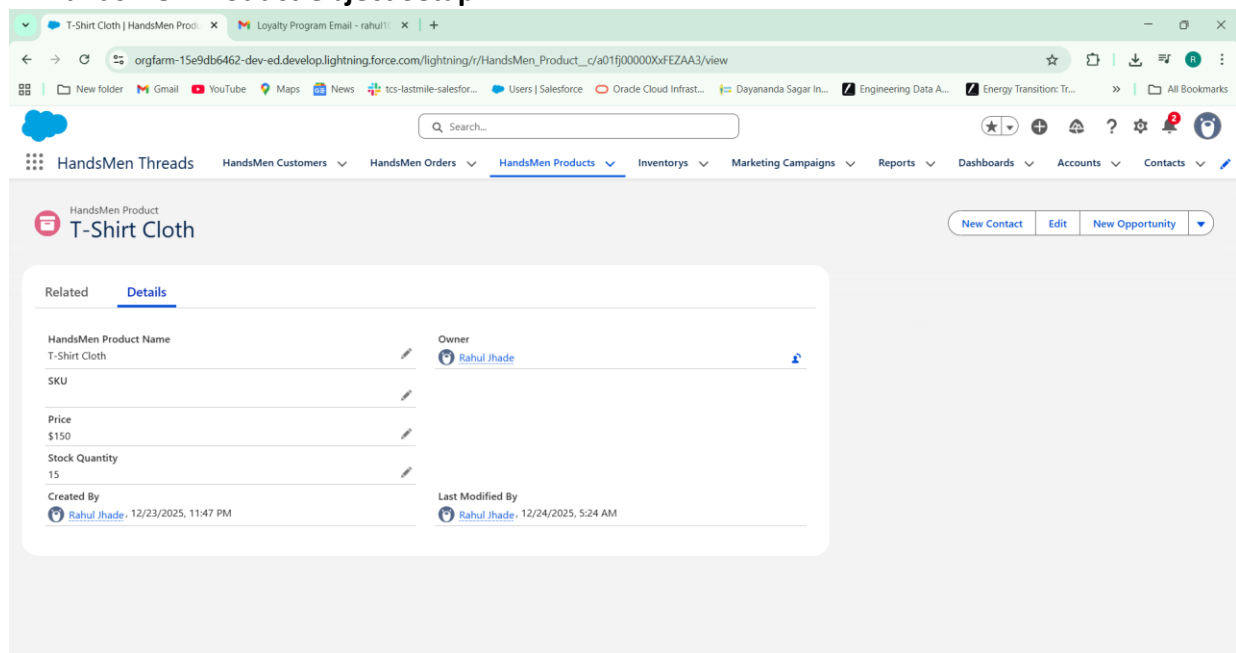
Custom templates with merge fields are used for stock alerts and loyalty updates, ensuring professional, dynamic communication.

Business Impact:

- **Efficiency:** Automation reduces manual work.
- **Customer Experience:** Immediate confirmation and loyalty recognition.
- **Inventory Reliability:** Alerts avoid stockouts and delays.

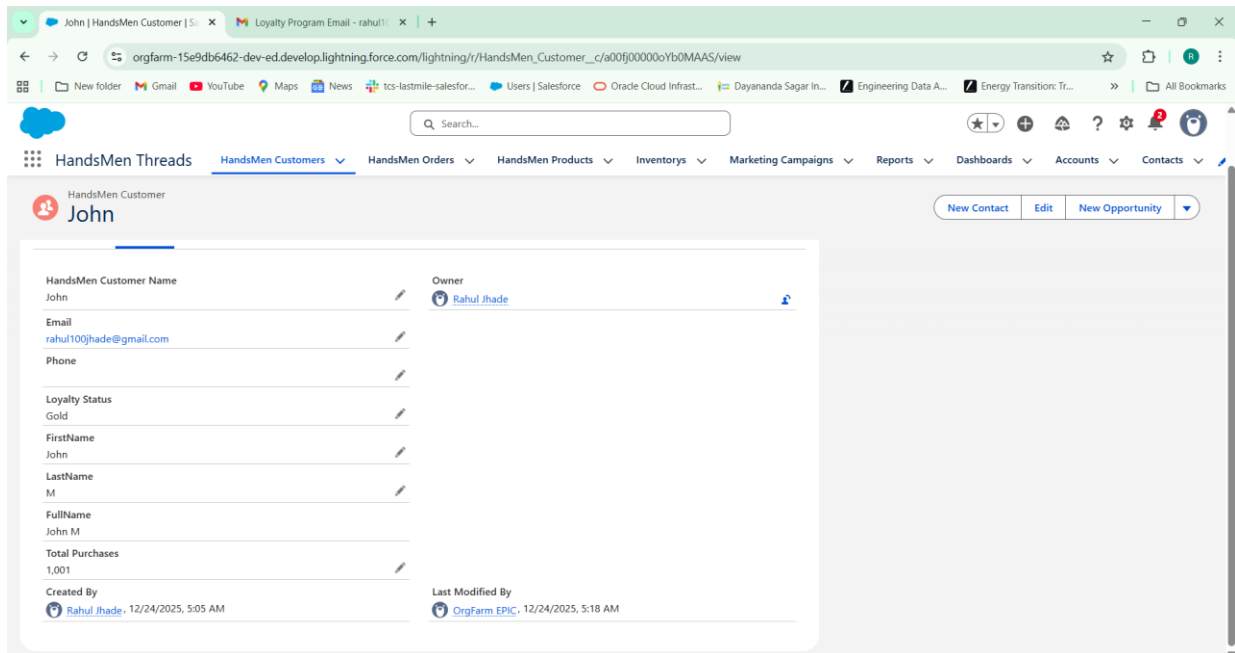
Process & Implementation Steps :

1. HandsMen Product Object Setup



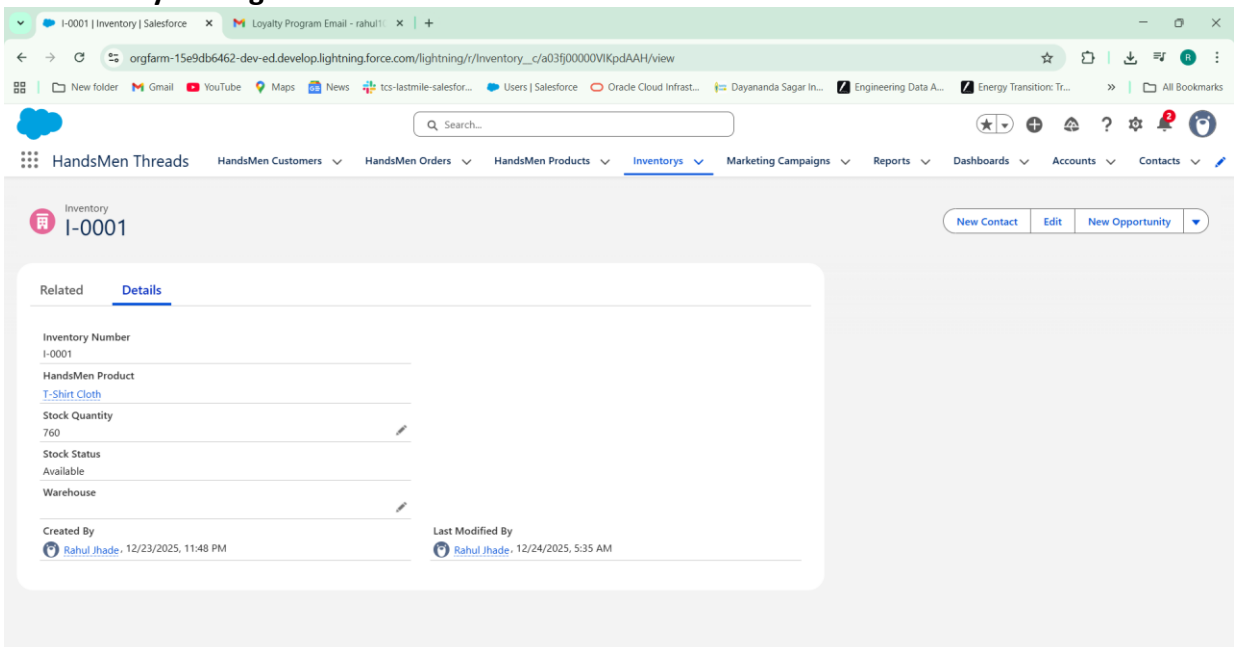
- Custom object "HandsMen Product" created.
- Fields include: Product Name, SKU, Unit Price, and Current Stock.
- Relationships: Linked to Orders and Inventory objects.
- Purpose: Centralized tracking of product catalog and inventory levels.

2. HandsMen Customer Object Setup



- Custom object "HandsMen Customer" stores customer details.
- Fields include: Name, Email, Phone, Total Orders, and Loyalty Status.
- Purpose: Enables tracking of purchase history and loyalty categorization.

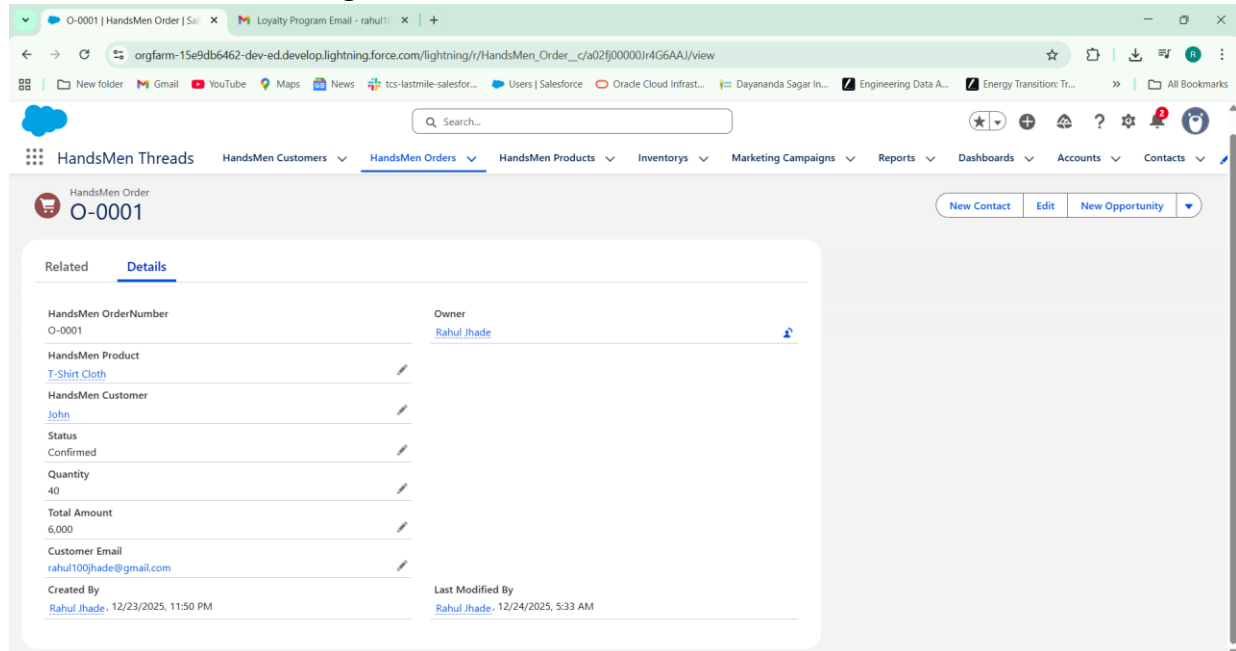
3. Inventory Management



- Custom object "Inventory" tracks product stock status.
- Linked to the Product object.

- Contains fields like Product Lookup, Quantity in Stock, and Threshold for Low Stock.
- Purpose: Triggers low stock alerts automatically via flow.

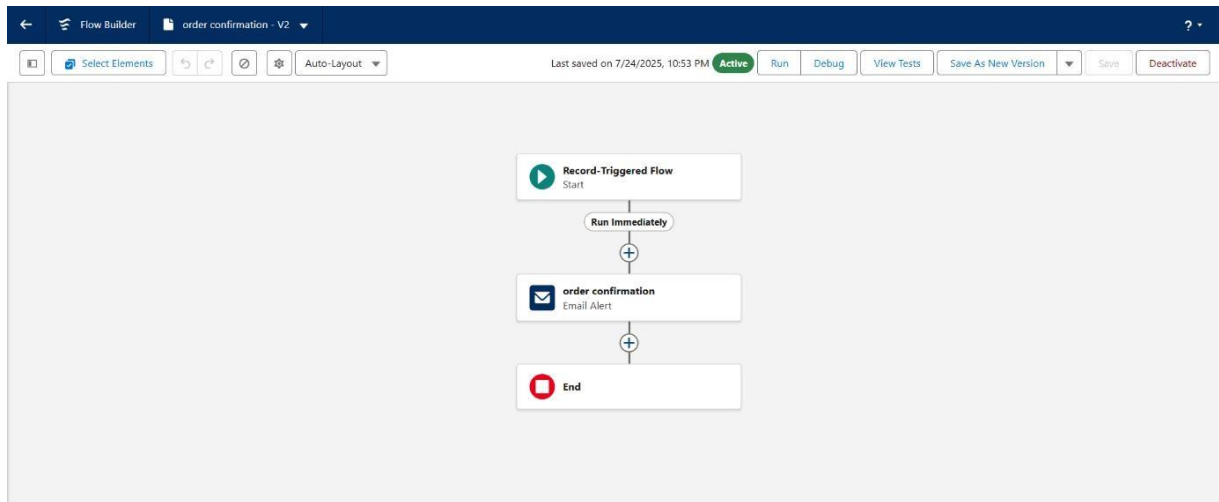
4. HandMen Order Management



Custom object "Order" captures order data.

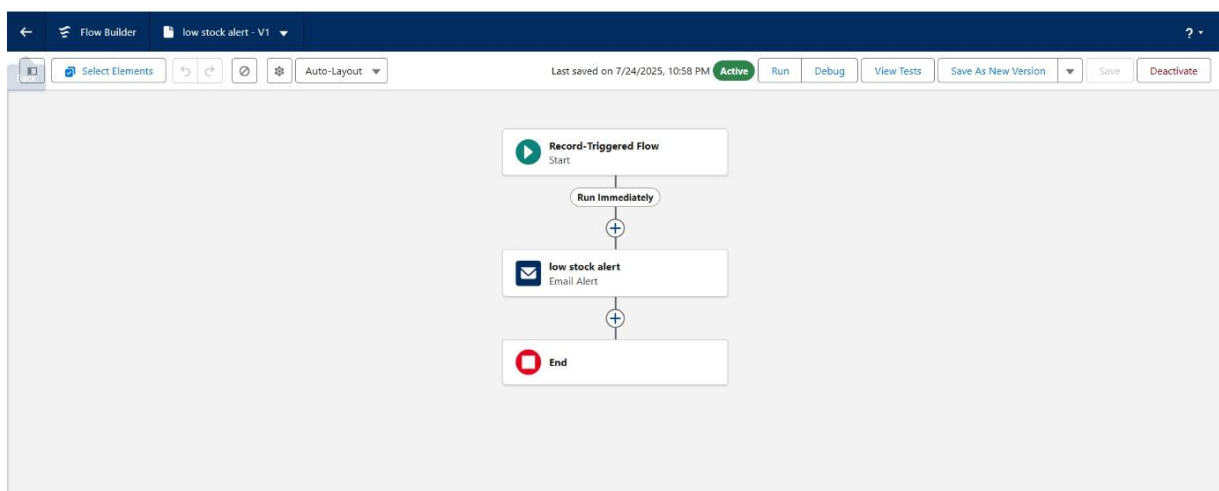
- Fields: Order ID, Customer Lookup, Product Lookup, Quantity, Total Price, Order Date, and Status.
- Flow linked to send order confirmation emails on creation.

5. Order Confirmation Flow



- **Type:** Record-Triggered Flow on Order creation.
 - **Steps:**
 - Triggered when a new order is created.
 - Fetch related customer and product details.
 - Sends an email using a custom template.
 - **Purpose:** Confirms order placement with the customer instantly.
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6. Low Stock Alert Flow



- **Type:** Scheduled Flow or Record-Triggered on Inventory Update.
- **Steps:**
 - Checks if stock is below the defined threshold.

- Sends a low-stock warning email to the inventory manager.
- **Purpose:** Prevents stockouts through proactive restocking.

7. Low Stock Alert Email Template

EditDeleteClone

Email TemplateSend Test and Verify Merge Fields

SubjectLow Stock Alert Email

Plain Text Preview

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

- HTML or rich-text email template.
- Dynamic merge fields pull Product Name and Quantity from records.
- Purpose: Notifies manager with clear, real-time product stock details.

8. Loyalty Program Flow

Email Template

Send Test and Verify Merge Fields

Subject

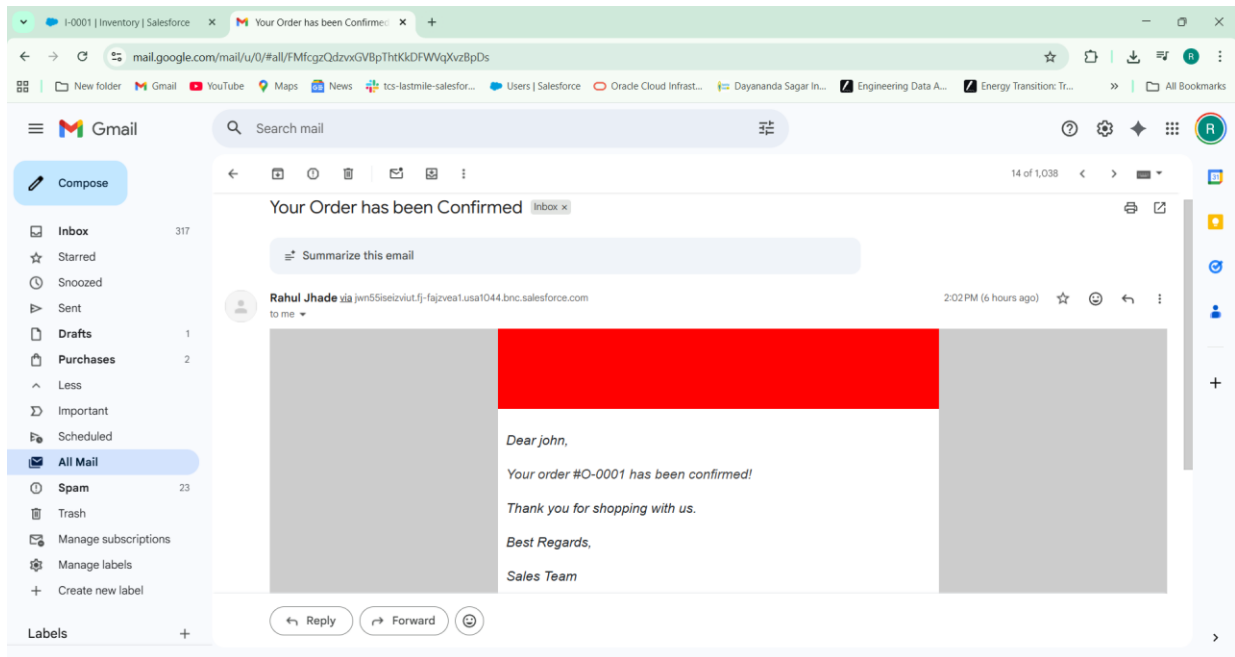
Loyalty Program Email

HTML Preview

Congratulations! You are now a
{!HandsMen_Customer__c.Loyalty_Status__c} 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.

- **Type:** Scheduled Flow that runs weekly/monthly.
- **Steps:**
 - Iterates through all customers.
 - Calculates total purchases.
 - Updates loyalty status (Bronze/Silver/Gold).
 - Sends status update via email.
- **Purpose:** Rewards repeat customers and boosts engagement.

9. Order Confirmation Email Template



- Custom email template triggered by the Order Confirmation Flow.
- Includes dynamic details like customer name, product, quantity, and total price.
- Sent immediately upon order creation.
- **Purpose:** Confirms order placement and provides order summary to the customer.

Conclusion:

The HandsMen Threads project streamlines order processing, inventory tracking, and customer engagement using Salesforce automation. With flows and custom objects, it enhances efficiency, reduces manual work, and improves the overall customer experience.