

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

PROJECT OVERVIEW

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

Description: HandsMen Threads is implementing a customized Salesforce CRM to modernize its business operations, streamline data management and grow customer engagement. The CRM will centralize the key business information including customers, products, orders and inventory into a unified and reliable system.

OBJECTIVES

- Ensure high data integrity by implementing UI-level validation rules and structured data entry processes.
- Centralize all customer, order, product, and inventory information into a unified Salesforce CRM.
- Automate key business processes to reduce manual workload, including order confirmations, loyalty updates, and stock alerts.
- Provide real-time visibility into customer activity, inventory levels, and financial updates for informed decision-making.
- Improve customer engagement through timely communications and personalized loyalty program adjustments.

APPLICATION ARCHITECTURE

Custom Application Name: HandsMen Threads

The screenshot shows a web-based application interface for 'HandsMen Threads'. At the top, there is a navigation bar with links for 'HandsMen Customers', 'HandsMen Orders', 'HandsMen Products', 'Inventory', 'Marketing Campaigns', 'Reports', 'Dashboards', 'Accounts', and 'Contacts'. Below the navigation bar, a search bar says 'Search...'. On the left, a sidebar titled 'Recently Viewed' lists 'Richard Alaron'. The main area displays a table with one item: 'Richard Alaron' under 'HandsMen Customer Name'. There are buttons for 'New', 'Import', 'Change Owner', and 'Assign Label' at the top right of the table area. A search bar 'Search this list...' is also present.

Custom Objects:

- HandsMen Customer: Used to create new customer with fields like name, email, phone, loyalty status and total purchases.
- HandsMen Product: Used to create new product with fields like SKU, price and stock quantity.
- HandsMen Order: Used to make an order for customers with fields like status (e.g. Pending, Confirmed), quantity, total amount and product.
- Inventory: Used to manage the stock of a product.
- Marketing Campaign: Used to make a marketing campaign for advertisements and promotions.

HandsMen Threads Application Structure

Object Name	Type	Description	Key Fields
HandsMen Customer__c	Custom Object	Stores customer details	Name (Record Name), Email (Email), Phone (Phone), Loyalty_Status__c (Picklist: Bronze, Gold, Silver)
HandsMen Product__c	Custom Object	Stores product catalog	Name (Record Name), SKU (Text), Price (Currency), Stock_Quantity__c (Number)
HandsMen Order__c	Custom Object	Stores customer orders	Order_Number (Record Name), Status (Picklist: Pending, Confirmed, Rejection), Quantity__c (Number), Total_Amount__c (Number)
Inventory__c	Custom Object	Tracks inventory levels	Auto Number (Record Name), Warehouse (Text), Stock_Quantity__c (Number)
Marketing_Campaign__c	Custom Object	Manages promotions & campaigns	Campaign_Name (Record Name), Start_Date (Date), End_Date (Date)

Standard Objects:

- *Reports*
- *Dashboards*
- *Accounts*
- *Contacts*

APPLICATION FLOWS

1. Create a HandsMen Customer

- Necessary Fields: HandsMen Customer Name, Email, FirstName and LastName.

New HandsMen Customer

* = Required Information

Information

* HandsMen Customer Name

Email

Phone

Loyalty Status

Owner

 Richard Alarcon

FirstName

LastName

Total Purchases

[Cancel](#)

[Save & New](#)

[Save](#)

2. Create a HandsMen Products

- Necessary Fields: All

New HandsMen Product

* = Required Information

Information

* HandsMen Order Name
 Complete this field.

Owner
 Richard Alarcon

SKU

Price

Stock Quantity

3. Create Inventory records

- Necessary Fields: All

New Inventory

* = Required Information

Information

Inventory Number

* HandsMen Product
 

Stock Quantity

Warehouse

4. Create an Order

- Necessary Fields: All

New HandsMen Order

* = Required Information

Information

HandsMen OrderNumber

Owner

Richard Alarcon

HandsMen Product

Search HandsMen Products... 

HandsMen Customer

Search HandsMen Customers... 

Status

--None-- 

Quantity

Total Amount

* Customer Email

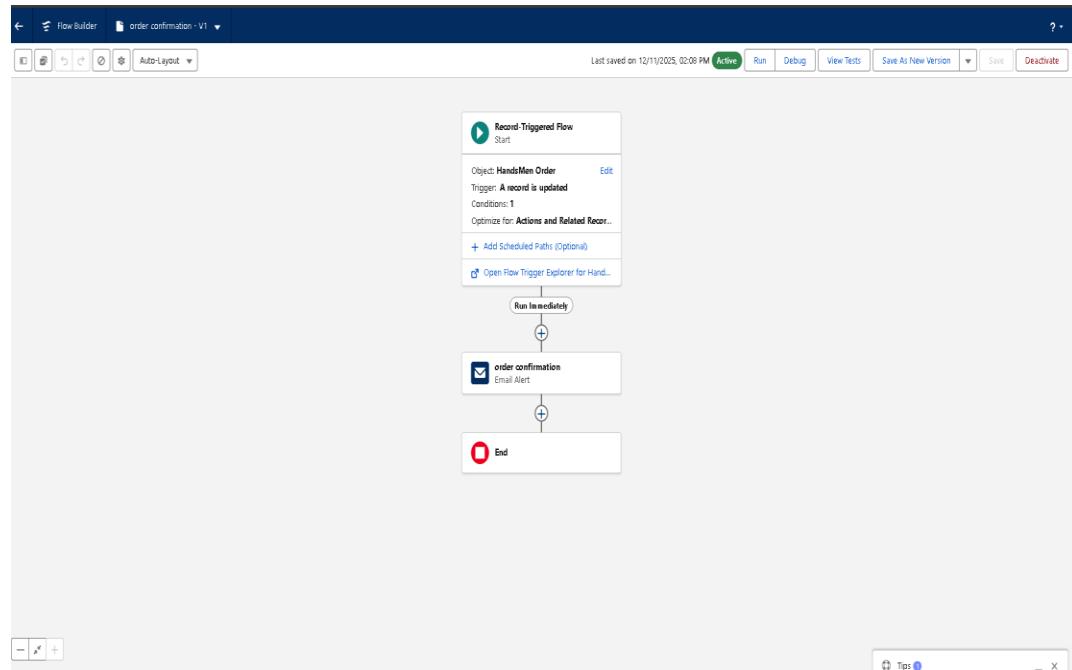
  

BUSINESS AUTOMATIONS FLOWS AND SCHEDULED PROCESSES

A. Flows

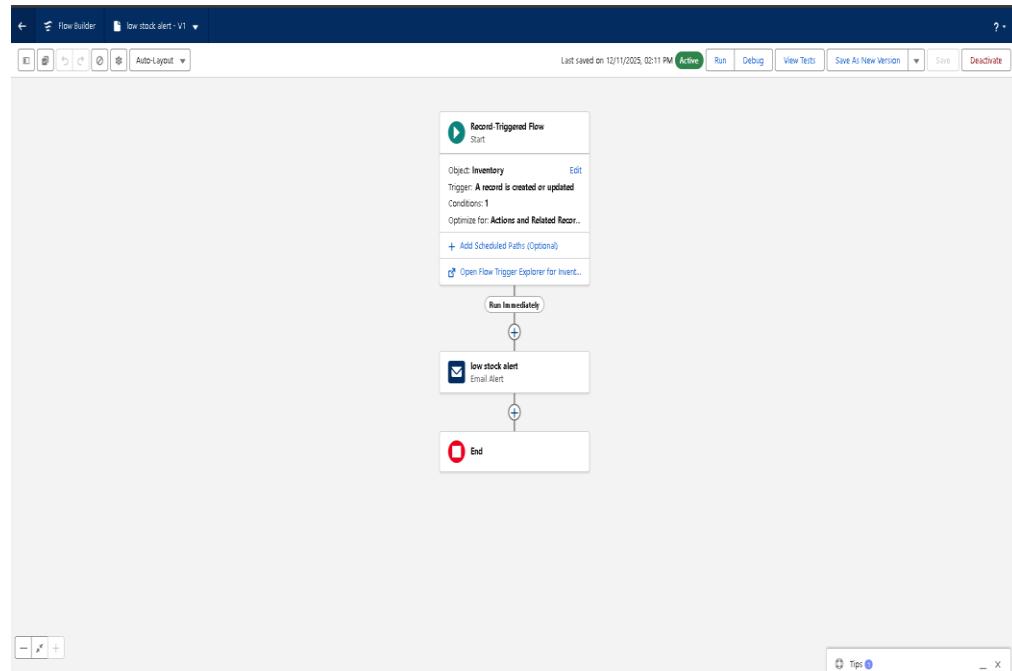
1. Order Confirmation Flow

- Purpose: If status field is confirmed then send the order confirmation email alert.



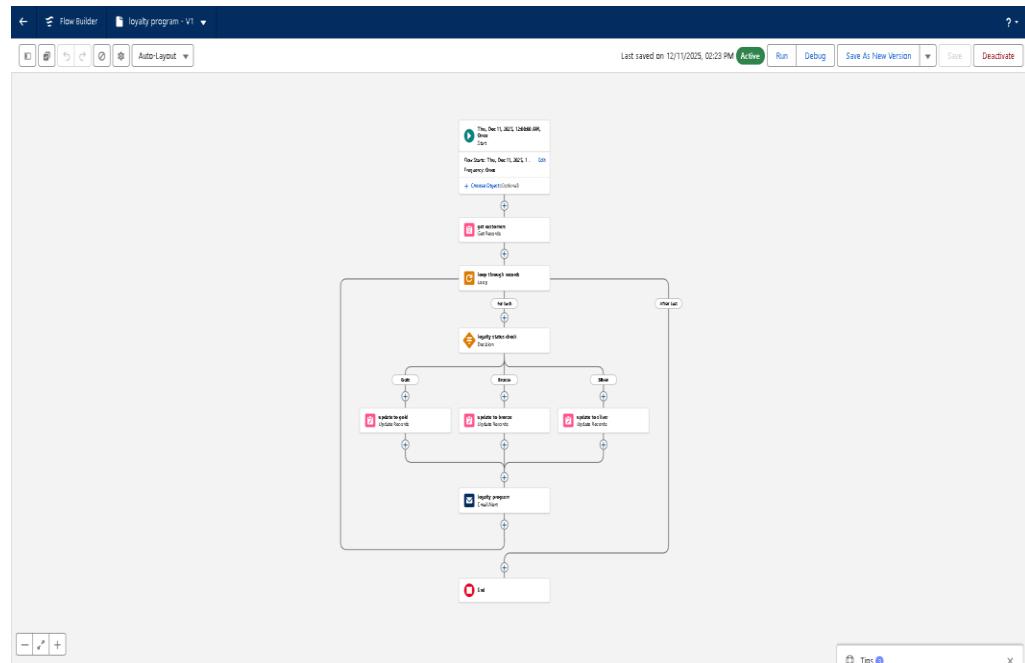
2. Low Stock Alert Flow

- Purpose: If stock quantity field is less than 5 then send the low stock email alert.



3. Loyalty Program Flow

- Purpose: It runs on specified date and get all the handsmen customer, loop through its records and check the loyalty status based on total purchases. It then updates the loyalty status to either Bronze, Silver or Gold and send a loyalty program email alert.



B. Triggers

1. Order Total Trigger

- Purpose: OrderTotalTrigger, automatically calculates the total amount (Total_Amount__c) for orders (HandsMen_Order__c) before they are inserted or updated. It retrieves the price (Price__c) of the associated product (HandsMen_Product__c) and multiplies it by the order's quantity (Quantity__c) to compute the total.

```
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
14    for (HandsMen_Order__c order : Trigger.new) {
15        if (order.HandsMen_Product__c != null && productMap.containsKey(order.HandsMen_Product__c)) {
16            HandsMen_Product__c product = productMap.get(order.HandsMen_Product__c);
17            if (order.Quantity__c != null) {
18                order.Total_Amount__c = order.Quantity__c * product.Price__c;
19            }
20        }
21    }
}
```

2. Stock Deduction Trigger

- Purpose: This Salesforce Apex Trigger updates inventory levels (`Inventory__c`) when an order (`HandsMen_Order__c`) is confirmed. It first retrieves inventory records associated with the products in the orders. For each confirmed order (`Status__c == 'Confirmed'`), it reduces the stock quantity (`Stock_Quantity__c`) of the corresponding inventory by the order's quantity (`Quantity__c`).

```
Code Coverage: None API Version: 65 Go To
16     WHERE HandsMen_Product__c IN :productIds]
17 );
18
19 List<Inventory__c> inventoriesToUpdate = new List<Inventory__c>();
20
21 for (HandsMen_Order__c order : Trigger.new) {
22     if (order.Status__c == 'Confirmed' && order.HandsMen_Product__c != null) {
23         for (Inventory__c inv : inventoryMap.values()) {
24             if (inv.HandsMen_Product__c == order.HandsMen_Product__c) {
25                 inv.Stock_Quantity__c -= order.Quantity__c;
26                 inventoriesToUpdate.add(inv);
27                 break;
28             }
29         }
30     }
31 }
32
33 if (!inventoriesToUpdate.isEmpty()) {
34     update inventoriesToUpdate;
35 }
36 }
```

Conclusions

The HandsMen Threads project meets its goals by keeping data accurate with strong validation rules, storing all information in one CRM system, automating important tasks to lessen the workload, and giving real-time updates about customers.

This project shows how Salesforce CRM helps a business grow by improving customer experience through its tools and customization features.