

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

Abstract

HandsMen Threads CRM is designed to streamline customer, inventory, and order management for a modern men's fashion brand focused on premium clothing and customer personalization. The CRM supports key business functions such as managing customer profiles, product catalog, orders, loyalty rewards, automation workflows, and marketing campaigns. With Salesforce as the foundation, the system ensures improved operational efficiency, better tracking of customer relationships, and enhanced business intelligence through dashboards and automated processes.

Objectives

The primary objective of the HandsMen Threads CRM is to centralize and optimize business operations by improving customer tracking, automating orders and marketing communication, and enhancing inventory management. The system will help the business deliver a more personalized and seamless experience to customers while increasing efficiency in sales and operations. By implementing key Salesforce features such as workflows, automation, dashboards, and custom objects, the CRM enables the business to scale while maintaining accuracy, quality service, and strong customer engagement.

Detailed Execution of Project Phases

Phase 1: Requirement Analysis & Planning

The CRM addresses the need for organized customer management, automated order processing, inventory monitoring, and marketing engagement for HandsMen Threads. The system ensures centralized tracking of customer profiles, buying history, product stock levels, and sales performance.

2. Defining Project Scope and Objectives

The scope includes creating custom objects (Products, Orders, Inventory, Campaigns), setting automation triggers for emails, assigning user roles for admin and sales staff, and generating reports and dashboards for insights.

3. Design Data Model and Security Model

Custom objects, field relationships, and roles (Admin, Sales Associate, Inventory Manager) were structured to maintain secure access and proper data sharing.

4. Stakeholders Mapping

Stakeholders include Business Owner, Sales Team, Inventory Manager, Marketing Team, and Internal Admin.

5. Execution RoadMap

Development → Configuration → UI build → Automation → Data Migration → Testing → Deployment → Maintenance.

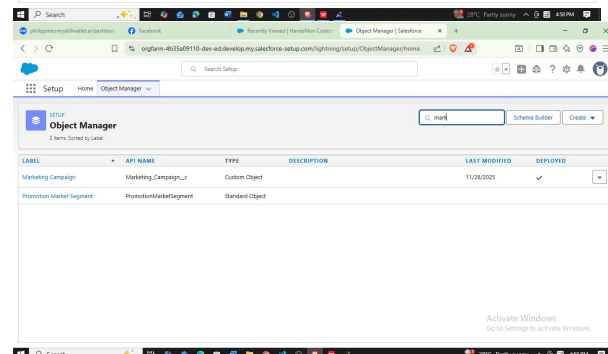
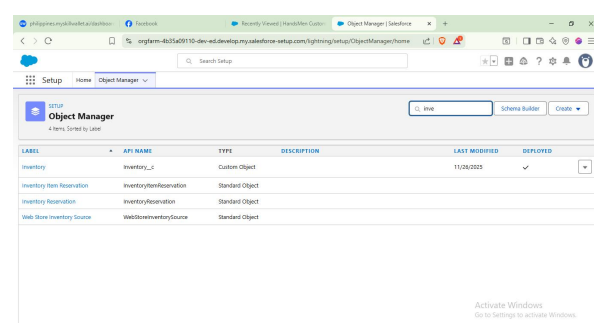
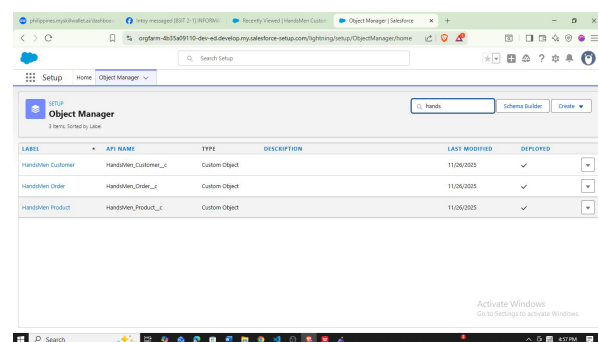
Phase 2: Salesforce Development – Backend & Configurations

1. Setup Environment & DevOps Workflow

Setup environment and DevOps workflow for safe configuration

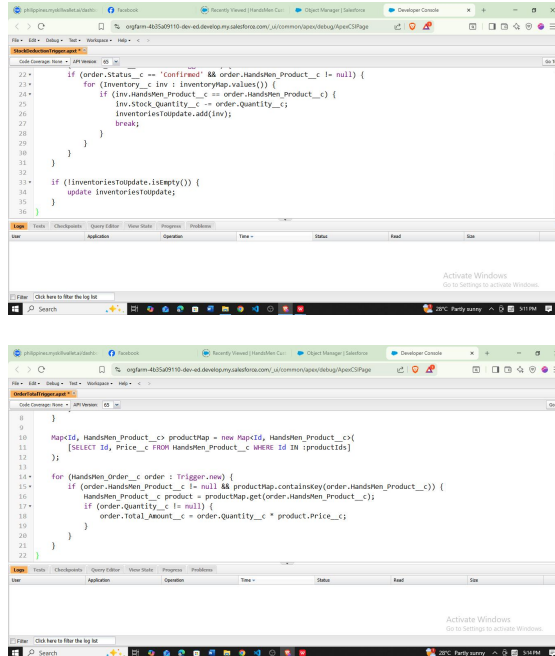
2. Customization of Salesforce Objects & Automation

Object Manager, Handsmen Products, Handmens Orders, Handsmen Customer Inventory, Marketing Campaigns.



3. Apex Development

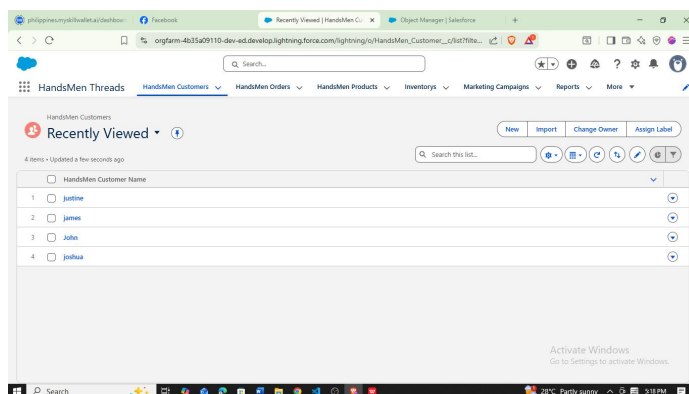
Apex Classes (if applicable): (If you created example triggers such as automatic loyalty calculation.)



Phase 3: UI/UX Development & Customization

1. Lightning App Setup

Create and configure Lightning App using App Manager.
Define navigation and app branding.

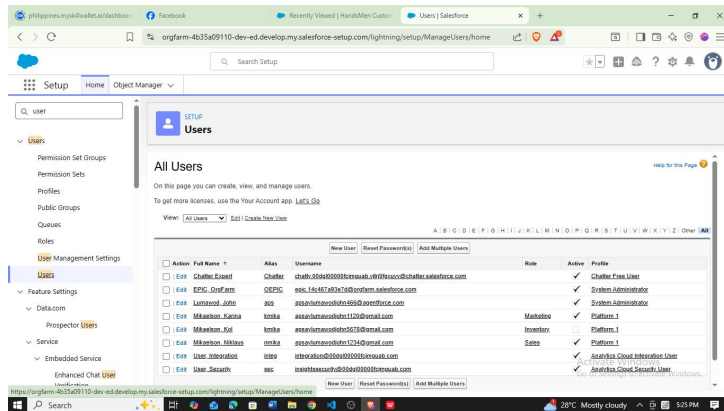


2. Page Layouts & Dynamic Forms

Design page layouts to optimize user workflow.
Use dynamic forms for field visibility based on user roles or conditions.

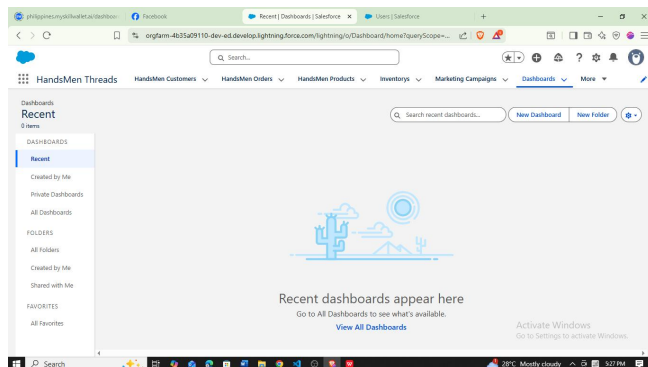
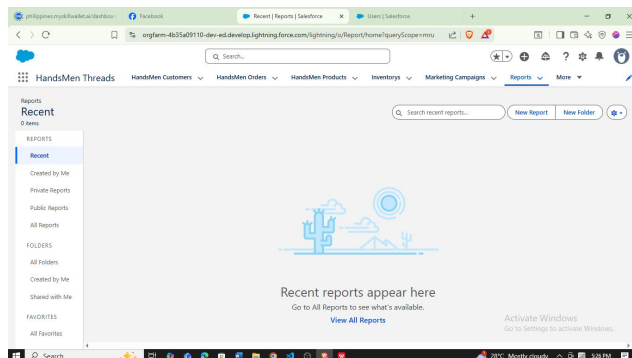
3.User Management

Create profiles, assign permission sets, and manage users.
Screenshots to show user creation and profile assignments.



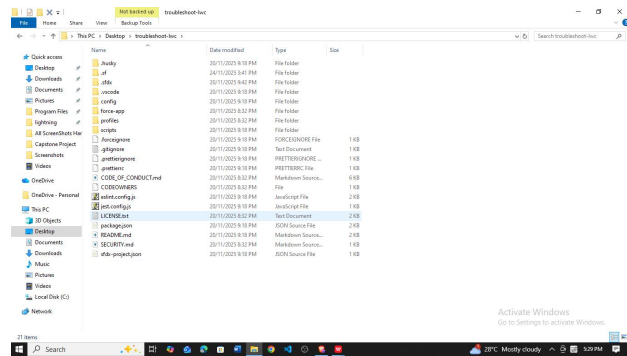
4. Reports and Dashboards

Design dashboards to visualize KPIs, booking trends, and customer insights.
Include screenshots for all reports and dashboards.



5. Lightning Web Component (LWC) Development (if applicable)

Build custom LWCs to enhance UI functionality.
Provide screenshots of components in action.



6. Lightning Pages

Responsive record pages for faster sales operation.

Phase 4: Data Migration, Testing & Security

1.Data Loading Process

Used Data Import Wizard to upload Customer, Product, and Inventory records.

2.Field History & Duplicate Management

Enabled tracking for Order Status, Stock changes, and applied duplicate prevention on customer records.

3. Profiles, Roles, Permission Sets & Sharing Rules

Ensured proper role hierarchy: Admin > Inventory Manager > Sales Rep.

4. Test Classes & Test Cases

Test Classes (if Apex created): Ensured 75% or above code coverage.

Test Cases Prepared For: Order creation

Low stock automation

Customer loyalty update

Approval workflows

Email alert automation

Phase 5: Deployment, Documentation & Maintenance

1. Deployment Strategy

Used Change Sets from Sandbox to Production. Validated before deployment.

2. System Maintenance & Monitoring

Regular monitoring of automation logs, field data accuracy, and user access.
Scheduled review of reports and dashboards.

3. Documentation & Troubleshooting

Logged issues through Salesforce Setup → Debug Logs → Flow Error Logs →
Permission review. Fixes documented.

Conclusion

The HandsMen Threads CRM successfully delivers an organized, automated, and scalable business solution that enhances operational efficiency and improves customer experience. By centralizing customer records, automating order and inventory processes, and generating meaningful insights through dashboards, the CRM supports growth and strengthens business strategy. With its flexible and user-friendly architecture, the system is capable of future enhancements such as chatbot support, online order integration, and AI-driven fashion recommendations.

The platform enhances operational efficiency, strengthens customer relationships, and supports future growth for the brand ultimately elevating the sophistication and service quality that defines HandsMen Threads.

Additional Points

- **Only the essential details** were included in the documentation, describing the required objects, flows, validation rules, automations, and Salesforce configurations — while avoiding step-by-step procedures.
- **Screen captures/screenshots** from Salesforce Setup and all relevant configurations should be included for every Salesforce feature implemented in the project.
- A brief explanation was provided for all important components, including **validation rules, approval processes, automation flows, page layouts, and custom objects** created for the CRM.
- A **clear Testing Approach** was mentioned, describing how test cases were prepared and executed for flows, reports, approval processes, and other system functionalities.
- **Future Enhancements** were identified, such as chatbot integration, advanced analytics, AI-driven suggestions, and upgraded loyalty features that can be implemented later as the business grows.

SCREENSHOTS

