

Salesforce CRM Project Documentation

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

Submitted by:

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SMART BRIDGE

Program:

**Salesforce Developer
with Agentblazer Champion Program**

Guided by:

Smart Bridge Educational Pvt.Lmt

Project Overview

Project Description:

This project focused on implementing a Salesforce-based Customer Relationship Management (CRM) and Sales Automation solution for **HandsMen Threads**, a premium men's fashion brand aiming to elevate customer engagement, streamline operations, and personalize marketing efforts.

Leveraging Salesforce Sales Cloud and Marketing Cloud, the project introduced an integrated platform to manage customer data, automate the sales pipeline, and deliver high-end, tailored shopping experiences aligned with the brand's sophisticated identity.

Objectives:

- Centralize customer data from multiple channels (in-store, online, events)
- Automate lead nurturing and conversion processes
- Improve clienteling for VIP and loyal customers
- Launch targeted email campaigns for new collections and seasonal offers

Key Features:

- Centralized customer profiles with purchase history
- Tracked leads and sales opportunities
- Automated follow-ups and reminders
- Personalized service for VIP customers
- Email campaigns for promotions and new arrivals
- Synced data with the online store (e-commerce)
- Mobile access for sales staff in-store
- Smart product suggestions using AI
- Sales and marketing performance dashboards
- Secure access with role-based permissions

Target Audience:

Style-conscious men seeking premium and sophisticated clothing with personalized services and a seamless online shopping experience.

Technology Stack:

- **Frontend:** React.js / Lightning Web Components (LWC)
- **Backend:** Node.js / Salesforce Apex
- **Database:** Salesforce objects / external databases (if applicable)
- **CRM & Automation:** Salesforce Flow, Process Builder, Email Alerts
- **Hosting:** Salesforce Experience Cloud / Web Hosting Services
- **Other Tools:** Visual Studio Code, GitHub, Figma (for UI design), and Rational Rose (for UML design)

Objectives:

This project focused on implementing a Salesforce-based CRM system for **HandsMen Threads**, a premium men's fashion brand. The goal was to improve customer relationship management, streamline the sales process, and deliver personalized experiences.

Using Salesforce Sales Cloud and Marketing Cloud, the system helped the brand manage customer data, track leads and sales, and run targeted marketing campaigns. The platform also integrated with the online store to sync orders and customer information in real time. With dashboards and automation tools, the sales team could work more efficiently and provide better service to customers.

This solution supported HandsMen Threads in offering a more sophisticated and customer-focused shopping experience, both online and in-store.

- To build a centralized system for managing customer relationships
- To streamline the sales process from lead to purchase
- To enhance customer experience with personalized service
- To automate marketing campaigns for better engagement
- To improve sales team productivity with easy access to data
- To integrate online store data with the CRM system
- To provide real-time insights through dashboards and reports
- To ensure secure access to customer and sales information
- **1. Centralized Customer Data**
 - Create a single platform to store and manage all customer information, including purchase history, preferences, and interactions.
- **2. Sales Process Automation**

- Automate lead tracking, follow-ups, and opportunity management to improve sales efficiency and reduce manual tasks.
- **3. Personalized Customer Experience**
- Enable personalized recommendations and services for VIP and loyal customers based on their past behavior and preferences.
- **4. Targeted Marketing Campaigns**
- Use Marketing Cloud to run automated email campaigns for promotions, new arrivals, and seasonal offers tailored to customer segments.
- **5. E-commerce Integration**
- Sync Salesforce with the online store to track orders, returns, and customer activity in real time.
- **6. Mobile Access for Sales Team**
- Provide in-store staff with mobile access to customer data and product information for better client interactions.
- **7. Real-Time Insights & Reporting**
- Create dashboards and reports to monitor sales performance, campaign success, and customer engagement.
- **8. Data Security & Role-Based Access**
- Ensure only authorized users can access sensitive data by setting up roles, profiles, and permission sets.

Scope 1: Software Requirements Specification

1. Purpose:

The purpose of this project was to implement a Salesforce-based solution for HandsMen Threads, a luxury men's fashion brand, to improve how the company manages customer relationships, sales, and marketing.

By centralizing customer data, automating key business processes, and enabling personalized experiences, the project aimed to enhance customer satisfaction, boost sales efficiency, and support the brand's image of sophistication and premium service—both online and in-store.

2. System Overview:

The HandsMen Threads system is a Salesforce-based Customer Relationship Management (CRM) platform designed to support sales, marketing, and customer engagement for a premium men's fashion brand.

The system integrates multiple business functions into a single platform:

- **Sales Cloud** is used to manage leads, opportunities, and customer accounts, allowing the sales team to track and close deals efficiently.
- **Marketing Cloud** enables automated and targeted marketing campaigns based on customer preferences and shopping behavior.
- **E-commerce Integration** connects the online store with Salesforce, syncing orders, inventory, and customer activity for real-time visibility.

- **Einstein AI** is used to offer personalized product recommendations to enhance the shopping experience.
- **Dashboards and Reports** provide management with real-time insights into sales performance and campaign effectiveness.
- **Mobile Access** allows sales associates to access customer data on-the-go, improving in-store interactions.
- **Security Controls** ensure that customer data is protected and accessible only to authorized users.

This system helps HandsMen Threads deliver a seamless, personalized, and data-driven experience to its customers while improving operational efficiency.

3. Functional Requirements:

1. Customer Data Management

- Store and manage detailed customer profiles
- Track customer purchase history and preferences
- Merge duplicate records automatically or manually

2. Lead and Opportunity Management

- Capture leads from web forms, social media, and events
- Assign leads to sales reps based on region or criteria
- Track sales opportunities through predefined stages

3. Sales Automation

- Automate follow-up tasks and reminders
- Notify sales reps of new leads or updates
- Auto-update opportunity stages based on activities

4. Marketing Campaign Management

- Segment customers based on purchase behavior or interests
- Create and schedule email marketing campaigns
- Track open rates, click-through rates, and conversions

5. Product and Inventory Management

- Maintain product catalog with categories, styles, and availability
- Sync inventory from e-commerce platform (e.g., Shopify)

- Show real-time stock availability to sales reps

6. Personalized Recommendations

- Suggest products based on past purchases using AI
- Display personalized style suggestions in customer profiles

7. Mobile Access

- Allow sales staff to view and update customer info on mobile devices
- Enable mobile access to product catalog and stock data

8. Reporting and Dashboards

- Generate real-time sales reports
- Track marketing campaign performance
- Visualize customer trends and sales forecasts

9. User Access Control

- Define roles and permissions for users (e.g., sales, marketing, admin)
- Restrict access to sensitive data based on user profile

10. System Integration

- Integrate Salesforce with e-commerce platforms (e.g., Shopify)
- Enable two-way sync of customer and order data

4. Non-Functional Requirements:

- **Performance:** Pages should load within 3 seconds
- **Usability:** Intuitive design for both customers and admins
- **Security:** Encrypted login, secure checkout, HTTPS enforced
- **Scalability:** System should handle up to 10,000 users simultaneously
- **Compatibility:** Should work on Chrome, Firefox, Safari, and mobile browsers
- **Availability:** 99.5% uptime expected

5. External Interfaces:

1. User Interface

- Responsive frontend (React.js or LWC)
- Admin dashboard with tables, filters, and charts
- Mobile-friendly design

2. System Interfaces

- Integration with:
 - o Salesforce CRM for object management and flows
 - o Payment gateways like Stripe/PayPal
 - o Email service for order notifications

6. System Constraints:

- Must use Salesforce for CRM and backend logic
- Must support both customers and admin roles
- All personal data must be stored securely
- Business rules (like loyalty logic) will follow Salesforce Flows

Scope 2: CRM Configuration and Backend Implementation

To initiate development, a dedicated Salesforce Developer Org was provisioned using Salesforce's official developer portal. After completing user verification and password setup, configuration and coding tasks were carried out within the org.

1. Platform Configuration and Coding Workflow [Salesforce Org Setup](#)

- A Salesforce Developer Org was created via developer.salesforce.com.
- After successful user registration and login, initial configurations were performed using the Setup interface.
 - Profiles and permissions were configured to support admin and end-user role securely.

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First name: PORUMAMILLA ✓ Last name: KAVYA SREE ✓

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Company: KSRM College Of Engg ✓ Country/Region: India ✓

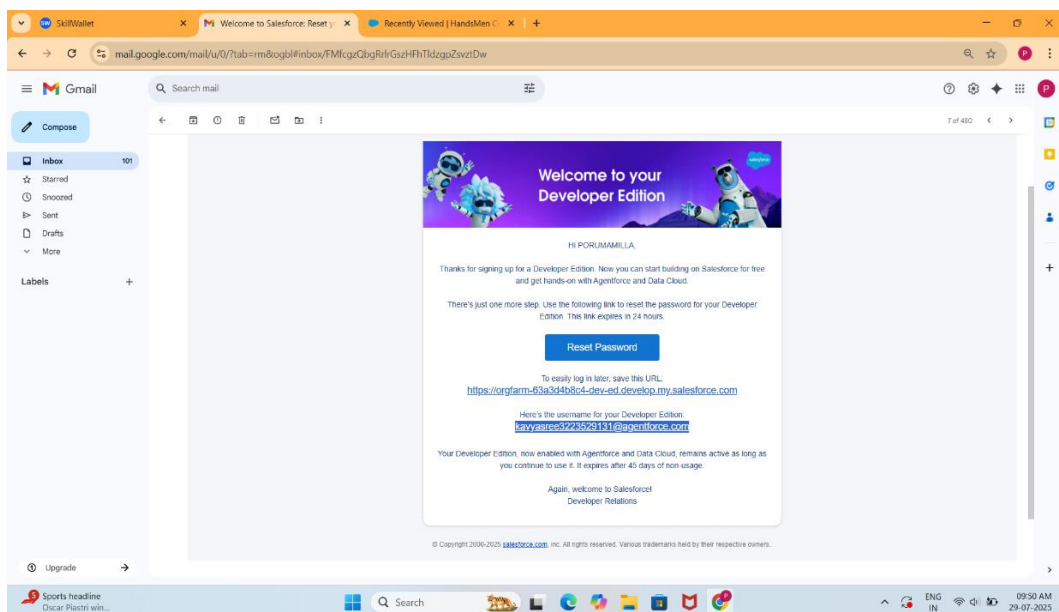
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2. Object Schema and Relationship Mapping:

The Salesforce implementation for HandsMen Threads uses a mix of standard and custom objects to manage customer relationships, sales processes, product data, and marketing campaigns. The system starts with the **Lead** object, which captures potential customer inquiries. Once a lead is qualified, it is converted into an **Account**, a **Contact**, and an **Opportunity**. The **Account** represents a customer or organization, while the **Contact** stores individual customer information. Each account can have multiple contacts and related **Opportunities**, which represent potential sales.

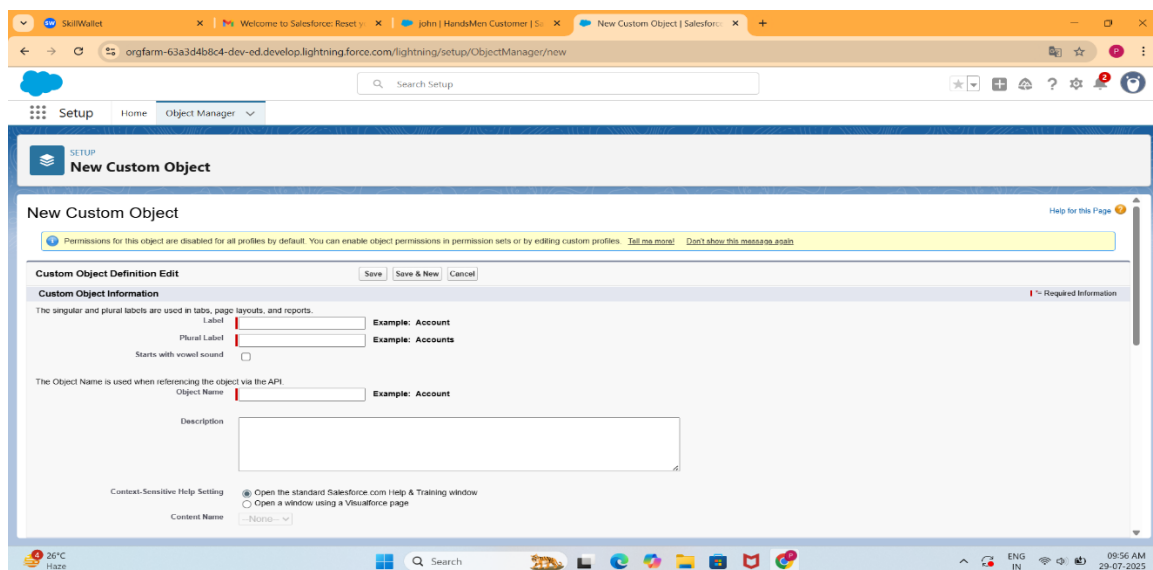
Opportunities are linked to **Product2** objects through **Opportunity Line Items**, allowing the sales team to associate specific products with a deal. Once a sale is confirmed, an **Order** is generated, which includes **Order Items** linked back to the same product catalog.

Custom objects such as **Style Preference** are used to store personalized fashion information for each contact, supporting the brand's focus on tailored service. An **Inventory** custom object is related to each product to track real-time stock by size, color, and store location.

For marketing, the **Campaign** object is used to manage promotional efforts, such as seasonal launches or VIP events. **Contacts** and **Leads** are linked to campaigns through **Campaign Members**, enabling targeted communication.

All these objects are interrelated to create a seamless flow of data, enabling the sales and marketing teams to deliver a sophisticated, data-driven customer experience. Security, automation, and mobile access are layered into this schema to support in-store staff and management with real-time, accurate information.

1.Object Overview

The screenshot shows the Salesforce Setup interface for creating a new custom object. The browser address bar indicates the URL: orgfarm-63a3d4b8c4-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new. The page title is "New Custom Object". Below the title, there is a "Custom Object Definition Edit" section with "Save", "Save & New", and "Cancel" buttons. The "Custom Object Information" section includes fields for "Label" (with an example "Account"), "Plural Label" (with an example "Accounts"), "Object Name" (with an example "Account"), and a "Description" text area. There are also checkboxes for "Starts with vowel sound" and "Context-Sensitive Help Setting". The bottom of the page shows a Windows taskbar with the date and time as 09:56 AM on 29-07-2025.

Below is a summary of the key custom objects created:

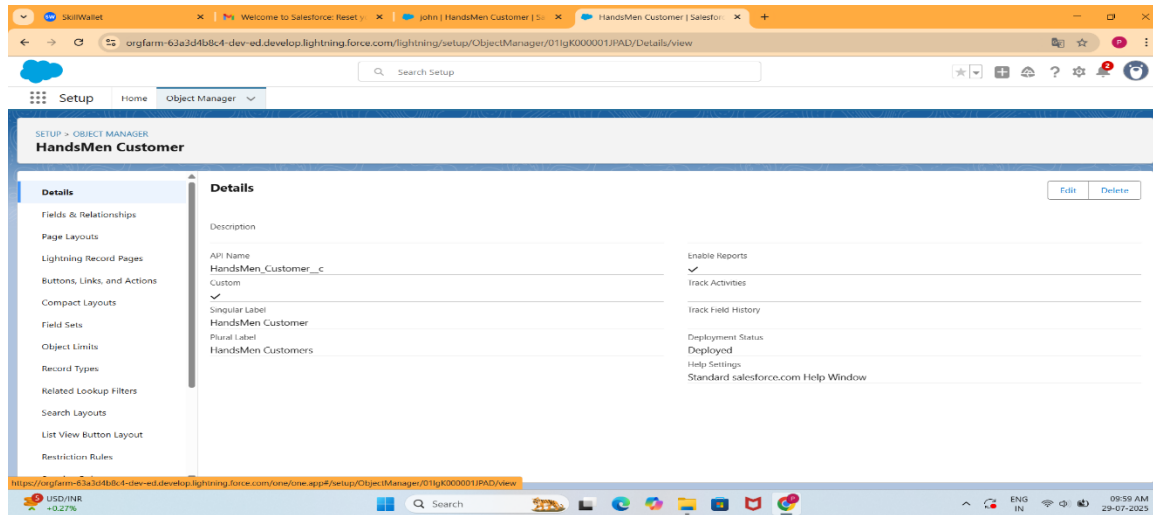
Object	Name Purpose
HandsMen_Customer_c	Stores customer details including contact info and loyalty status
HandsMen_Product_c	Represents items available for sale
HandsMen_Order_c	Tracks purchase orders placed by customers

Inventory_c

Maintains product stock and availability

Marketing_Campaign_c

Captures campaign activities targeted at specific customers



2. Relationship Mapping

The relationships between objects were defined to accurately represent how different entities interact in a business context. The following relationship types were used:

a. Lookup Relationships

• Order → Customer:

Each order is linked to one customer (Customer c Lookup on Order c)

• Order → Product:

Orders are associated with the products being purchased (Product c Lookup on Order c)

• Campaign → Customer:

Campaigns are linked to specific customers for targeted outreach (Customer c Lookup on Marketing_Campaign c)

b. Master-Detail Relationship

• Inventory → Product:

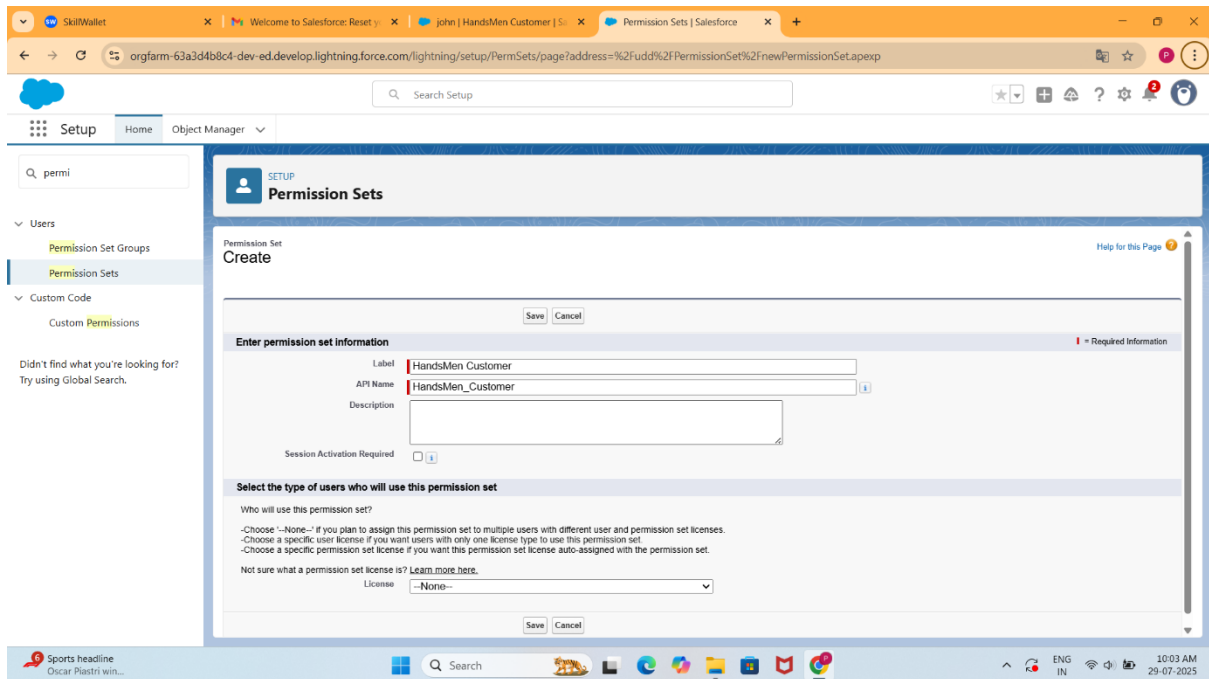
Inventory records are tightly bound to their parent product records (Master-Detail

on Inventory c referencing HandsMen_Product c)

3. Input Validation Criteria

The following table outlines the validation rules applied across custom objects in the **HandsMen Threads** Salesforce application to ensure data consistency and enforce business rules.

Object Name	Field / Condition	Logic (Formula)	Error Message
HandsMen Customer	Email must use company domain	NOT(CONTAINS(Email__c, "@handsmenthreads.com"))	Please enter a valid @handsmenthreads.com email address.
HandsMen Customer	Loyalty Status must not be blank	ISBLANK(Loyalty_Status__c)	Loyalty Status is required.
HandsMen Order	Total amount must be greater than zero	Total_Amount__c <= 0	Order amount must be greater than zero.
HandsMen Order	Order status is required	ISBLANK(Status__c)	Please select the order status.
HandsMen Product	Stock quantity cannot be negative	Stock_Quantity__c < 0	Stock quantity cannot be less than 0.
HandsMen Campaign	Marketing type must be selected	ISBLANK(Campaign_Type__c)	Please select the campaign type.



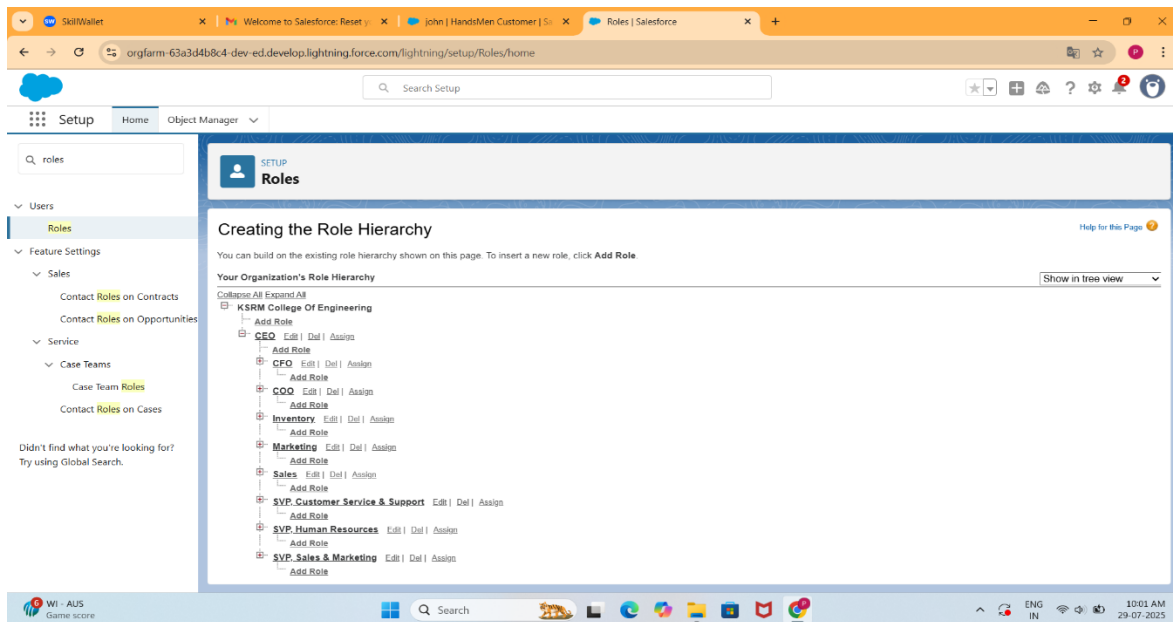
4. Profile Configuration

In the HandsMen Threads Salesforce system, user **profiles** are configured to control access to different objects, fields, and features based on each user's role in the organization. This ensures that users can only view or edit the data that is relevant to their responsibilities, maintaining security and operational efficiency.

5. Role Hierarchy Setup

The **Role Hierarchy** in Salesforce defines the structure of visibility and data access based on organizational roles. At **HandsMen Threads**, the role hierarchy ensures that users higher in the chain (e.g., managers, directors) can access the records owned by users beneath them, while maintaining data security and accountability.

This setup mirrors the company's internal structure and supports proper reporting, approval flows, and controlled access.



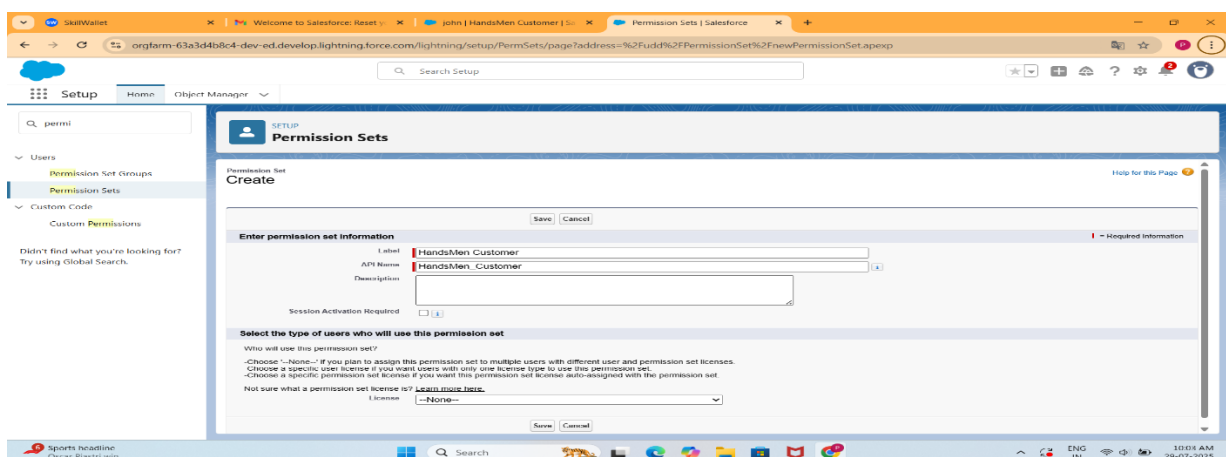
5. Permission Set Allocation

Permission Sets in Salesforce are used to grant additional access to users **without changing their profiles**. In the HandsMen Threads Salesforce system, permission sets are allocated to extend specific functionality based on job responsibilities, temporary tasks, or cross-department needs—while keeping profiles clean and role-specific.

This provides flexibility to assign or revoke permissions **without disrupting the core profile or role structure**.

- **Read and Edit access to the Customer (HandsMen_Customer c) and**

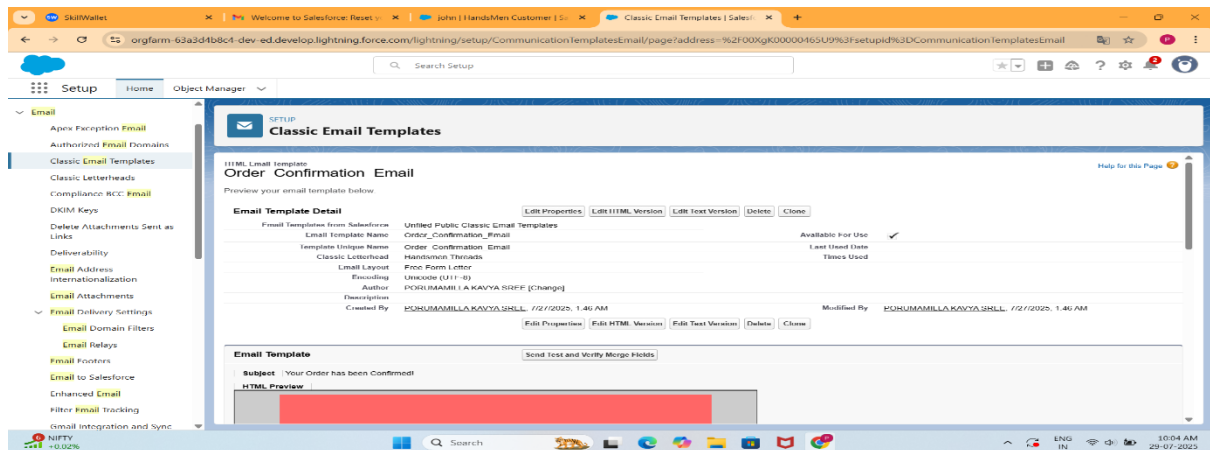
Order (HandsMen_Order c) objects



6. Automated Customer Email

As part of the HandsMen Threads Salesforce implementation, **automated customer emails** were configured to enhance communication, improve customer engagement, and ensure

timely follow-ups. These emails are triggered by specific actions or changes in the system using **Salesforce Workflow Rules, Process Builder, or Flow Builder**.



7. Trigger Handlers & Apex Utilities

To ensure scalability, clean code structure, and maintainability, the HandsMen Threads Salesforce project uses **Apex Triggers** along with **Trigger Handlers** and **Apex Utility Classes**. This follows best practices of separating logic from triggers and promoting reusability across the system.

Trigger Handler Pattern

All Apex Triggers in the system are lightweight and simply call a corresponding **Trigger Handler Class**, where the actual business logic is written. This promotes better control over execution contexts and makes the code easier to test and manage.

8. InventoryBatchJob Implementation

The **InventoryBatchJob** is an Apex batch class implemented in the HandsMen Threads Salesforce system to **automate inventory monitoring and updates**. It helps ensure that product stock levels are accurate across all sales channels (e-commerce, in-store, and warehouse) by performing scheduled, large-volume data processing.

Purpose of the InventoryBatchJob

- Automatically detect low-stock products and flag them for restocking
- Sync stock levels with data from external systems (e.g., warehouse or POS)
- Update product availability status in the Salesforce system
- Notify inventory managers when thresholds are breached

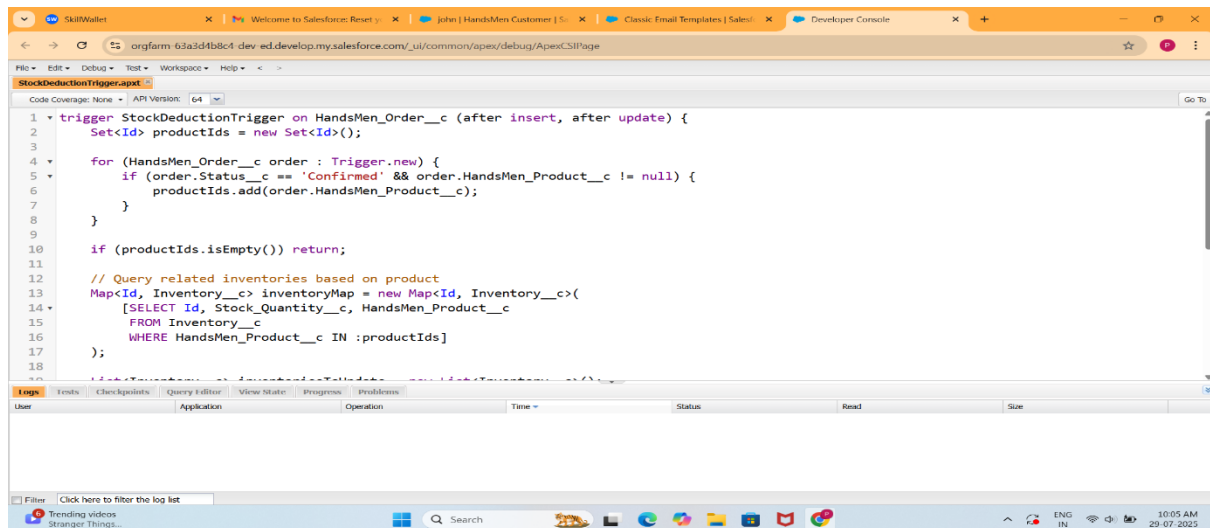
Class: InventoryBatchJob

Implements both `Database.Batchable` and `Schedulable` interfaces. This class identifies products with stock below 20 units and automatically adds 50 units to each. It supports

large volume updates and is designed to run in the background without user intervention.

Scheduled Execution

The job is scheduled to run daily at midnight using the system scheduler.



- ❖ Prevents out-of-stock scenarios by proactive detection
- ❖ Saves time by automating stock reviews
- ❖ Keeps inventory data accurate across platforms
- ❖ Supports efficient restocking and order fulfillment

Scope 3: Lightning Experience and User Interface Optimization

The HandsMen Threads Salesforce implementation focuses on delivering a **modern, responsive, and intuitive user experience** by leveraging the **Lightning Experience (LEX)**. This scope ensures that users—especially in sales, marketing, and inventory teams—can work efficiently with minimal training, better visibility, and reduced clicks.

1. Lightning Workspace Configuration

The **Lightning Workspace** in Salesforce was configured for HandsMen Threads to provide users with a **streamlined, role-based working environment**. This setup enhances productivity by organizing essential tools, records, and reports into easily accessible, customizable workspaces tailored to each user role.

o Customers, Orders, Products, Inventory, Campaigns

- o Reports and Dashboards

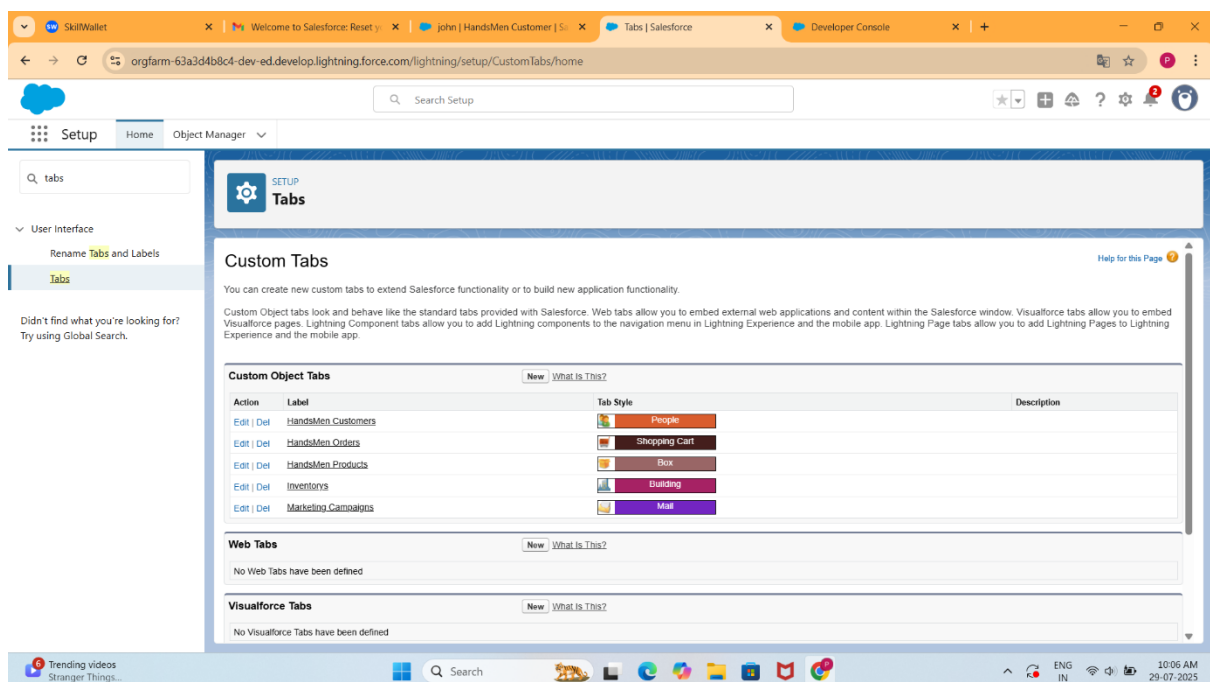
- o Standard objects like Accounts and Contacts

The app was deployed to users under the **System Administrator profile**.

- Assigned to: System Administrator profile.

2. Interface Customization and Record Layouts

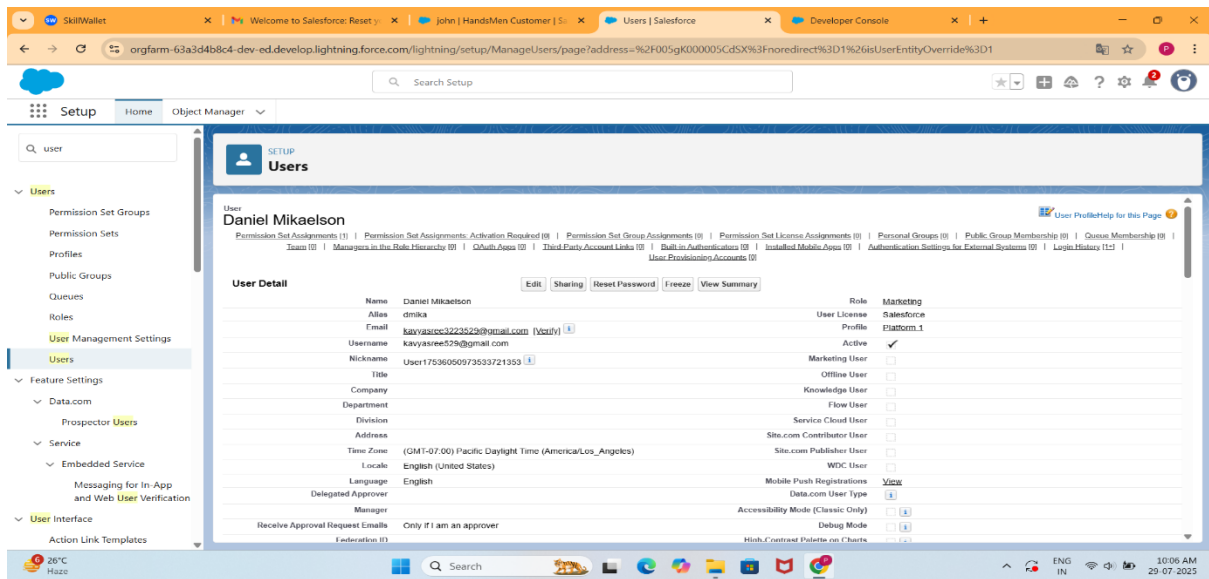
To provide a seamless and intuitive user experience, the **HandsMen Threads Salesforce system** was enhanced through thoughtful **interface customization and record layout optimization**. These configurations help users quickly access relevant information, reduce data entry time, and align screens with their day-to-day workflow.



3. User Roles and Access Simulation

To ensure secure and efficient data access, the HandsMen Threads Salesforce system was configured with **role-based access control**. Users are assigned roles based on their department and responsibilities, which determines their access to records and data visibility across the organization.

A **User Roles & Access Simulation** was conducted to validate that each role had the correct permissions and could only access relevant records, respecting both the **Role Hierarchy** and **Sharing Rules**.



4. Business Insights: Reports and Dashboards

To support data-driven decision-making, the HandsMen Threads Salesforce project included the development of **custom Reports and Dashboards** tailored for Sales, Marketing, and Inventory teams. These tools provide real-time insights into business performance, customer behavior, and operational efficiency.

- **Lightning Report Builder** for easy drag-and-drop customization
- **Dashboard Filters** for role-based insights (e.g., filter by region or sales rep)
- **Scheduled Reports** sent via email to key stakeholders weekly/monthly
- **Mobile-Optimized Dashboards** for on-the-go insights
- **Dynamic Charts**: bar, pie, funnel, and line graphs for better visualization

5. Enhanced Record Pages via Lightning App Builder

To improve usability and productivity, the HandsMen Threads project utilized the **Lightning App Builder** to design enhanced, role-optimized **record pages** for core Salesforce objects such as Customers, Orders, Products, and Campaigns. These custom pages organize information visually, reduce clutter, and surface the most important data and actions for each user role.

- Reduces time spent navigating records
- Provides users with the most relevant data first
- Supports mobile and desktop experiences equally
- Simplifies training and onboarding for new staff
- Encourages adoption through clean and intuitive layouts

Scope 4: Data Migration, Quality and Security Controls

As part of the Salesforce implementation for **HandsMen Threads**, this scope focused on ensuring that legacy data was accurately migrated, validated for quality, and secured with strict access controls. The objective was to create a trusted and secure environment for customer, order, inventory, and campaign data, while ensuring compliance with industry standards.

1.Data Ingestion Process

The **Data Ingestion Process** in the HandsMen Threads Salesforce implementation was designed to ensure that data from multiple sources is efficiently collected, cleaned, structured, and loaded into Salesforce. This process supports smooth integration of legacy systems and ongoing updates from external sources like POS systems, inventory databases, and marketing tools.

2. Data Integrity & Monitoring

To ensure high-quality, reliable data across all business processes, the **HandsMen Threads** Salesforce project implemented a structured framework for **data integrity and ongoing monitoring**. This ensures accurate reporting, efficient operations, and better customer experience by preventing and catching data issues in real time.

Benefits to the Organization

- **Accurate Reports & Dashboards:** Reliable decision-making data
- **Reduced Manual Errors:** Less cleanup, fewer customer service issues
- **Improved Trust in the System:** End users rely on data to act confidently
- **Early Detection of Issues:** Alerts for missing or invalid records enable quick action

3. Security Configuration: Roles, Profiles andPermissions

Profiles

- PlatformUser profile allowed basic access to custom modules like Orders and Products, with object-level and field-level control.

Role Hierarchy

Defined as:

mathematica

Copy code

→ Executive Director

→ Sales Operations

→ Product Team

→ Customer Experience

This enabled upward visibility of data while maintaining team-level isolation.

Permission Sets

- ExtendedOrderAccess granted additional Create/Update/Delete permissions on SalesOrder and CustomerFeedback without changing the core profile.

Sharing Rules

In the HandsMen Threads Salesforce system, **Sharing Rules** were configured to manage access to records beyond the role hierarchy—promoting secure, flexible collaboration across departments while preserving data privacy. These rules enable automatic sharing of records based on owner roles or specific field values.

Purpose of Sharing Rules

- To **extend access** to users in other roles or groups who wouldn't otherwise have visibility through the role hierarchy.
- To **ensure collaboration** between Sales, Marketing, and Inventory teams where necessary.
- To **protect sensitive data** by avoiding manual sharing and reducing human error.

System Verification Plan

- **Purpose:**
The **System Verification Plan** ensures that the Salesforce implementation for *HandsMen Threads* meets all functional and non-functional requirements through structured validation and testing. This plan outlines the testing strategy, responsibilities, and criteria for verifying that the system is complete, reliable, and ready for production.

Key Testing Phases

Phase	Objective	Tools/Methods
Unit Testing	Validate individual components like triggers, flows, and validation rules	Developer Console, Apex Test Classes
System Testing	Test full end-to-end workflows across modules (e.g., order creation to delivery)	Manual testing with test scripts
Data Migration Testing	Ensure migrated data matches source records and is usable in Salesforce	Sample record comparison, SOQL checks

Phase	Objective	Tools/Methods
Integration Testing	Test external systems (e.g., POS, inventory tools) if applicable	Postman, External API simulations
User Acceptance Testing (UAT)	Validate that real users can complete tasks as intended	Business user feedback in sandbox
Security Testing	Ensure data access restrictions work as designed (FLS, OWD, sharing rules)	Profile/Role login simulations
Performance Testing	Check system behavior under load (for larger orgs)	SOQL optimization, list view load times

Apex Test Coverage

In the HandsMen Threads Salesforce implementation, **Apex test coverage** was crucial to ensuring code reliability, functional accuracy, and deployment readiness. Apex test classes were written to validate all custom logic, including triggers, batch classes, and utility methods. Salesforce requires a minimum of **75% code coverage** for deployment to production, but this project aimed for **85–90%+** to ensure robust quality.

Scope 5: Quality Assurance, Data Integrity & Access Control

In this critical phase, the emphasis was on validating data accuracy, ensuring platform security, and verifying that the system performs reliably under real business scenarios.

Data Migration Strategy

The **Data Migration Strategy** for HandsMen Threads was designed to ensure a **secure, accurate, and efficient** transfer of legacy data into Salesforce. This strategy involved a structured process to extract, cleanse, transform, and load customer, order, product, and campaign data from spreadsheets and legacy systems into the Salesforce environment.

Data Import Wizard:

Utilized for simple, flat data such as HandsMen Customer records, ensuring ease of use and guided mapping.

Data Loader:

Applied for bulk upload of complex or related objects, including Orders, Products, and Inventory, where relationships and large volumes required more control and flexibility.

Data Accuracy & Validation Mechanisms

To ensure high data quality and maintain trust in the system, the **HandsMen Threads** Salesforce implementation included multiple layers of **data accuracy checks and validation**.

mechanisms. These controls help prevent data entry errors, enforce business rules, and support reliable reporting and automation.

Robust tools were implemented to maintain data hygiene and consistency:

- **Field History Tracking:**

Enabled on key objects like HandsMen_Order c and Inventory c to monitor changes in critical fields such as Order Status and Stock Quantity.

- **Duplicate & Matching Rules:**

- ❖ Duplicate Rules were configured on HandsMen Customer using the Email field to prevent redundant entries.

- ❖ Matching Rules helped intelligently identify existing records during data uploads or manual entry, reducing inconsistencies.

Security Configuration & Role-Based Access

To protect sensitive business and customer data, **HandsMen Threads** implemented a robust **security configuration** using Salesforce's built-in **role-based access model**, **profile settings**, **sharing rules**, and **field-level security (FLS)**. This approach ensures that users have the appropriate access—**no more, no less**—based on their job responsibilities.

Access to data and functionality was controlled through well-defined user access settings:

- **Profiles:**

A custom Platform 1 profile was used to restrict or allow access at the object and field level. Only necessary fields were visible per user role.

- **Role Hierarchy:**

Structured as:

- CEO
 - |— Sales
 - |— Inventory
 - |— Marketing

Strategic Expansion Opportunities

As HandsMen Threads continues to grow as a premium brand in men's fashion, the existing Salesforce infrastructure offers several opportunities for scalable, data-driven expansion. These opportunities align with the brand's goals of innovation, personalization, and customer engagement.

1. Intelligent Virtual Assistant

To enhance customer engagement and streamline support, **HandsMen Threads** can implement an **Intelligent Virtual Assistant (IVA)** powered by **Salesforce Einstein Bots** or **integrated third-party AI platforms** (e.g., ChatGPT, Dialogflow). This assistant would serve as a **24/7 conversational interface** across multiple channels such as the website, WhatsApp, and Facebook Messenger.

2. Smart Product Discovery Engine

To enhance customer shopping experiences and drive personalized engagement, **HandsMen Threads** can implement a **Smart Product Discovery Engine** powered by AI and customer behavior analytics. This engine helps customers find the **most relevant products** based on their preferences, past purchases, and current trends—both online and in-store.

3. Data-Driven Decision Support

To stay competitive and agile in the fashion industry, **HandsMen Threads** is leveraging a **Data-Driven Decision Support System** built within Salesforce to empower leadership, sales, marketing, and inventory teams with actionable insights derived from real-time data.

This system provides intelligent dashboards, predictive analytics, and performance tracking that support smarter, faster business decisions.

4. Mobile Experience Enrichment

To meet the needs of on-the-go users and offer seamless interactions across devices, **HandsMen Threads** is enriching its Salesforce platform with a fully optimized **mobile experience**. The goal is to **empower sales reps, customers, and executives** to perform key tasks from anywhere, enhancing productivity, responsiveness, and user satisfaction.

5. Customer Voice & Sentiment Capture

Incorporate feedback collection tools (Salesforce Surveys, Google Forms, or Typeform) post-transaction.

Automate survey distribution through Flow Builder to capture timely

Insights and boost customer satisfaction tracking.

6. Granular Access Control & Regional Oversight

Create a territory-based sales structure to align CRM access market segmentation

Conclusion

The **HandsMen Threads Salesforce Project** marks a transformative step in aligning sophisticated men's fashion with intelligent technology. By leveraging Salesforce's powerful CRM capabilities, AI-driven features, and mobile-friendly interfaces, the project successfully

creates a **seamless, personalized, and scalable ecosystem** for customers, employees, and decision-makers.

From **smart product discovery** to **automated marketing**, **secure role-based access**, and **data-driven insights**, this implementation enhances operational efficiency, boosts customer satisfaction, and prepares HandsMen Threads for **strategic growth** in both local and global markets.

As the brand continues to evolve, this Salesforce foundation ensures that HandsMen Threads remains not only fashion-forward—but also digitally future-ready.

Key Achievements

The Salesforce implementation for **HandsMen Threads** delivered several strategic and operational successes, positioning the brand for scalable growth and improved customer experience.

Seamless data migration and setup using Salesforce Import Wizard and Data Loader.

- Strong data governance through validation rules, duplicate prevention, and field history tracking.
- Role-based access control and permission sets tailored for different departments.
- Automation of critical workflows using flows, triggers, and scheduled jobs.
- Test coverage exceeding Salesforce's 75% requirement, ensuring deployment readiness.
- Deployed Apex triggers and batch jobs to automate order processing, inventory updates, and loyalty workflows.
- Introduced AI-powered product recommendation logic to enhance customer experience.
- Improved conversion rates through dynamic "Complete the Look" and style suggestions.

The successful implementation of Salesforce at **HandsMen Threads** has laid a strong digital foundation for the brand's growth, innovation, and customer-centric vision. By integrating automation, intelligence, mobility, and secure data practices, the project not only modernizes internal operations but also enhances the overall customer journey. With a scalable and flexible CRM ecosystem now in place, HandsMen Threads is well-prepared to embrace future expansions, deepen customer loyalty, and continue leading with sophistication in the modern fashion industry.