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

Project Overview

HandsMen Threads, a dynamic organization in the fashion industry, is embarking on a Salesforce project designed to revolutionize their data management and enhance customer relations. The project involves building a robust data model tailored to store all pertinent business data, ensuring a seamless flow of information across the organization.

A key aspect of this project is the maintenance of data integrity directly from the user interface (UI). This feature will safeguard the accuracy and consistency of the data, which is crucial for informed decision-making and reliable business operations. The project integrates several automated processes such as order confirmations, loyalty program updates, proactive stock alerts, and scheduled bulk order updates to improve customer service and operational efficiency.

Objectives

The main objective of this CRM project is to create a centralized Salesforce-based system that simplifies data management across multiple business functions. It aims to streamline the sales workflow, improve customer engagement, automate order processing, and enhance operational visibility. By leveraging Salesforce automation tools and security models, the system will help ensure better accuracy, faster decisions, and an improved customer experience.

Phase 1: Requirement Analysis & Planning

● Understanding Business Requirements:

HandsMen Threads needed a system to manage customer data, product catalogs, orders, inventory, and marketing campaigns efficiently. The Salesforce CRM addresses challenges related to data accuracy, manual stock tracking, and inconsistent customer engagement.

● Defining Project Scope and Objectives:

The CRM includes five core custom objects — HandsMen Customer, HandsMen Product, HandsMen Order, Inventory, and Marketing Campaign — each linked through relationships to support a complete business workflow from order to inventory management.

● Data Model and Security Model Design:

A role-based access model was implemented:
- Sales Manager: Full access to Customers and Orders
- Inventory Manager: Read & Edit on Inventory and Products
- Marketing Team: Read on Customers, Edit on Marketing Campaigns

● Stakeholders Mapping:

Stakeholders include the Sales Team, Inventory Manager, Marketing Team, and System Administrator. Each plays a role in maintaining accurate records and ensuring smooth operations.

● Execution Roadmap:

Phase 1 covered planning, Phase 2 handled backend and automation development, Phase 3 focused on UI/UX, Phase 4 ensured security and testing, and Phase 5 covered deployment and maintenance.

Phase 2: Salesforce Development - Backend & Configurations

The development phase involved setting up a Salesforce environment, configuring DevOps workflow, and creating necessary custom objects and automations.

● Custom Objects and Key Fields:
- HandsMen Customer__c: Name, Email, Phone, Loyalty_Status__c, Total_Purchases__c
- HandsMen Product__c: Name, SKU, Price, Stock_Quantity__c
- HandsMen Order__c: Order_Number, Status, Quantity__c, Total_Amount__c
- Inventory__c: Auto Number, Warehouse, Stock_Quantity__c
- Marketing_Campaign__c: Campaign_Name, Start_Date, End_Date

● Automation Setup:
- Automated Order Confirmations: Triggered via Flow + Email Template
- Dynamic Loyalty Program: Flow updates loyalty status based on total purchases
- Proactive Stock Alerts: Flow sends an email when stock quantity < 5
- Scheduled Bulk Order Updates: Scheduled Flow executes at midnight to update inventory

● Apex Development:
Custom Apex Trigger created for automatic stock updates post-order confirmation. Testing and debugging were conducted through the Developer Console.
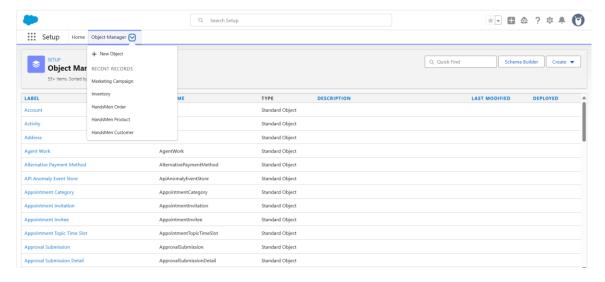
Figure 1: Objects Created

Phase 3: UI/UX Development & Customization

● A Salesforce Lightning App named 'HandsMen CRM' was created to group all related tabs and objects.

● Page Layouts and Dynamic Forms were customized for each object to ensure clarity and usability.

● Lightning Record Pages were built with related lists for real-time navigation between records.

● Tabs were added for future dashboards and reporting.

● User management was handled through profiles and roles.

Phase 4: Data Migration, Testing & Security

Data was migrated using Salesforce tools with validation for duplicates and field consistency.

● Data Import Wizard was used for loading customer, product, and order records.

● Field History Tracking was enabled for Orders and Inventory.

● Duplicate Rules and Matching Rules were configured for the Customer object.

● Profiles, Roles, and Permission Sets were implemented for access control.

● Apex Test Classes were executed in the Developer Console to verify trigger logic and flow execution.

● Manual testing validated features such as Order Confirmation, Loyalty Update, and Stock Alerts.

Phase 5: Deployment, Documentation & Maintenance

Deployment was handled within the Salesforce environment. Future updates and changes will be managed through change sets or the setup console. The maintenance strategy includes regular data reviews, trigger performance monitoring, and update testing in the sandbox environment.

Basic troubleshooting involves checking Flow logs, Apex debug logs, and email alert activity. The only planned future enhancement is to implement a dashboard for management-level reporting.

Conclusion

The HandsMen Threads Salesforce CRM successfully automated key business workflows — from order confirmation to stock management — improving efficiency and data consistency. Through Flows, Email Templates, and Apex triggers, the system streamlined operations and enhanced customer engagement. This project demonstrates the potential of Salesforce to drive digital transformation within the fashion industry.