

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

Technology:

Salesforce CRM Platform

Date of Submission:

July 2025

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Project Overview:

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

Project Type :- Custom CRM Solution

Industry Focus :- Luxury Men's Fashion

Preface :-

HandsMen Threads is a custom CRM result acclimatized to elevate client engagement and streamline business operations for a ultraexpensive men's fashion brand devoted to complication and style. The CRM focuses on managing client connections with high- end clientele, tracking preferences, managing bespoke orders, and enhancing service personalization. crucial features include client profiling, purchase history shadowing, appointment scheduling for fittings, fidelity program integration, and targeted marketing robotization. The CRM addresses core business requirements similar as perfecting client retention, optimizing deals processes, and delivering a luxury fashion experience with perfection and fineness.

Business Needs:-

The CRM is designed to address the following core business needs

1. Effective client data operation
2. Substantiated customer relations and follow- ups
3. Streamlined bespoke order tracking
4. Consolidated appointment and fitting schedules
5. Perceptivity into coping trends and client
6. Automated and targeted marketing juggernauts
7. Fidelity program integration to award returning guests

Crucial Features :-

The CRM system includes the following crucial features to support luxury fashion operations

1. Client operation :

- Detailed client biographies
- Style and preference tracking
- Purchase history with reprise order suggestions

2. Order and Appointment Management :

- Bespoke order lifecycle tracking
- Appointment scheduling and timetable operation
- Automated SMS/ dispatch monuments for fittings and deliveries

3. Marketing and fidelity :

- Segmented juggernauts grounded on client geste

- Integration with fidelity and referral programs
- Promotional announcements and seasonal offers

4. Analytics and Reporting :

- Deals and client engagement dashboards
- Force trend analysis
- Reports for business decision- making

5. Benefits :

By enforcing this CRM HandsMen vestments will gain the following benefits

- Enhanced client satisfaction and retention
- Bettered functional effectiveness and staff collaboration
- Individualized fashion gestic for every client
- Scalable platform to support business growth

Objectives :-

The CRM system for HandsMen vestments has been developed with the thing of transubstantiating how the brand manages client connections, streamlines operations, and delivers a high- end substantiated experience. The system's objects are nearly aligned with the business values of effectiveness, growth, and client satisfaction. **

2.1 Consolidated client operation:

- Figure a unified client database that stores crucial information similar as contact details, style preferences, and order history.
- Insure quick access to biographies for fashion advisers , enabling acclimatized relations and better service.

2.2 Individualized client Engagement :

- Use client data to deliver customized recommendations and offers grounded on individual preferences.
- Enhance client experience through substantiated dispatches and harmonious brand communication.

2.3 Streamlined Appointment Scheduling :

- Introduce an intertwined booking system for fittings and consultations.
- Automate appointment documentations and monuments to reduce no- shows and ameliorate staff effectiveness.

2.4 Effective Order Lifecycle Tracking :

- Examiner every stage of bespoke order processing — from original design to final delivery. Enable translucency for both guests and staff with real- time order status updates.

2.5 Targeted Marketing and fidelity Programs :

- Member guests grounded on purchase history and preferences for focused marketing. Promote client retention through fidelity prices, exclusive offers, and referral benefits.

2.6 Data- Driven perceptivity and Reporting :

- Induce logical reports to track deals performance, client trends, and business growth. Influence perceptivity for strategic opinions in marketing, force planning, and product design.

2.7 Robotization and functional effectiveness :

- Reduce homemade workloads by automating follow- ups, emails, order shadowing, and announcements.
- Ameliorate internal platoon collaboration and reduce chances of mortal error.

2.8 Scalability and unborn Expansion :

- Design a flexible CRM structure that supports long- term business growth and rigidity. Insure the platform remains responsive to the evolving requirements of the luxury fashion request.

Phase 1: Requirement Analysis & Planning

This initial phase focused on gathering, analyzing, and organizing the core requirements of the HandsMen Threads CRM system to ensure it aligns with the brand's goals and customer expectations. It involved working closely with stakeholders, understanding the business workflow, and planning the foundation for successful implementation.

3.1 Understanding Business Requirements :-

The following business needs and user problems were identified:

- Lack of a centralized system to manage customer data, preferences, and purchase history.
- Manual appointment scheduling and follow-up processes that lead to inefficiencies and missed opportunities.
- Difficulty in tracking custom order statuses, resulting in delays and poor communication with clients.
- Inability to personalize marketing campaigns and client engagement based on behavior or history.
- No structured loyalty or referral program to retain returning customers.
- Limited access to performance metrics and client analytics for strategic decisions.

3.2 Defining Project Scope and Objectives :-

The scope of this CRM project includes designing and developing a scalable, user-friendly, and secure system that supports luxury fashion retail operations.

Scope Includes:

- Customer data management
- Appointment scheduling and reminders
- Bespoke order tracking
- Marketing and communication automation
- Loyalty program management
- Analytics and reporting
- Project Objectives:
 - Provide a seamless and personalized customer journey.
 - Automate business workflows to reduce manual work and errors.
 - Enhance internal team collaboration through a shared platform.
 - Deliver actionable insights for business growth and expansion.
 - Ensure data privacy, security, and user access control.

3.3 Design: Data Model and Security Model :-

A foundational data and security model was designed to structure the system for both functionality and protection.

Data Model Components:

- Customer Entity: Includes name, contact details, preferences, size measurements, purchase history.

- Order Entity: Stores order ID, product details, customization specs, status, and delivery timeline.
- Appointment Entity: Includes customer ID, date/time, service type, consultant assigned, status.
- Marketing Campaign Entity: Holds campaign name, target segment, performance data, and engagement results.
- Loyalty Program Entity: Tracks points, rewards claimed, referral history, and membership tier.

Security Model Highlights:

- Role-Based Access Control (RBAC): Admin, Consultant, Marketing Executive, and Manager roles with defined permissions.
- Field-Level Security: Sensitive data like measurements, order history, and contact info protected per user role.
- Audit Logging: Records of user actions on critical records (e.g., order updates, profile edits).
- Data Encryption: Applied to personally identifiable information (PII) and financial transactions.
- Authentication: Secure login with session timeout and optional two-factor authentication (2FA).

Phase 2: Salesforce Development – Backend & Configurations

In this phase, the focus was on configuring and customizing the Salesforce environment to support the backend logic, automate business processes, and ensure smooth CRM functionality for HandsMen Threads. The implementation involved setting up the development environment, customizing standard and custom objects, and building automation and logic using declarative tools and Apex programming.

4.1 Setup Environment & DevOps Workflow :-

- Salesforce Org Setup: A dedicated Developer Org and Sandbox were created for development and testing.

- **Salesforce CLI & VS Code Integration:** The Salesforce CLI was configured with Visual Studio Code to streamline code development, deployment, and version control.
- **Source Control with GitHub:** Git repositories were used to track changes and manage collaborative development workflows.
- **Change Sets & Metadata Deployment:** Configuration elements and code were moved from the development environment to UAT using Change Sets and Metadata API.
- **DevOps Best Practices:**
 - Use of scratch orgs for isolated feature development
 - Pull requests for code review and approval
 - Continuous Integration/Deployment (CI/CD) pipelines using GitHub Actions

4.2 Customization of Salesforce Platform :

Custom Objects & Fields :

- Custom objects such as Client Profile, Bespoke Order, Appointment, and Loyalty Program were created.
- Fields like Style Preferences, Tailoring Notes, Order Status, and Points Earned were added to suit the business model.

Validation Rules :

- Ensured data quality by preventing incorrect or incomplete entries.
- Examples:
 - Order cannot be submitted without selecting fabric type.
 - Appointment date must be in the future.

Automation Tools :

- **Workflow Rules (for legacy compatibility):** Simple alerts for follow-ups.
- **Process Builder (now replaced by Flows):** Used for record updates and email alerts.

Flows (Record-Triggered & Screen Flows):

- Automatically send reminders before appointments.
- Collect client measurements through a guided input screen.

Approval Process:

- Implemented for approving custom orders before production.
- Multi-step approval for discounts and special requests.

4.3 Apex Development :-

Apex Classes :

- Reusable backend logic for complex business processes.
- Example: OrderHelper class to calculate estimated delivery time based on tailoring queue.

Apex Triggers :

- Code that executes before or after DML operations on records.
- Example:
 - Trigger on Bespoke Order to auto-update related Appointment status when the order is completed.

Asynchronous Apex :

Used to handle long-running or bulk operations that can't be performed in real-time:

- Future Methods:
Used for sending follow-up emails after order completion without blocking the user interface.
- Batch Apex:
Processes large volumes of order records (e.g., monthly loyalty summary reports).
- Queueable Apex:
Used for chaining background jobs such as calculating reward points after order approval.

Phase 3: UI/UX Development & Customization

This phase focused on building a user-friendly, responsive, and efficient user interface within Salesforce. It involved configuring Lightning App settings, customizing layouts for different user roles, managing access and visibility, and creating meaningful visual insights

using reports and dashboards. Lightning Web Components (LWC) were also introduced for enhanced interactivity and branding.

5.1 Lightning App Setup Through App Manager :-

- A custom “HandsMen Threads CRM” Lightning App was created using Salesforce App Manager.
- Customized branding with a logo and theme consistent with the luxury brand identity.
- App navigation tabs were configured for key objects such as:
 - Client Profiles
 - Bespoke Orders
 - Appointments
 - Loyalty Programs
 - Reports & Dashboards

5.2 Page Layouts & Dynamic Forms

- Customized Page Layouts were designed for different profiles (e.g., Fashion Consultant, Order Manager).
- Fields were organized into sections such as:
 - Client Information
 - Style Preferences
 - Order Summary
 - Loyalty Details

Dynamic Forms were implemented to:

- Show/hide fields based on record values (e.g., only show “Tailoring Notes” if “Custom Fit” is selected).
- Reduce clutter and improve usability by rendering only the relevant components.

5.3 User Management

- Profiles and Roles were configured to align with team responsibilities:
 - Admin
 - Fashion Consultant
 - Tailoring Supervisor
 - Marketing Executive
- Permission Sets were applied to allow special access (e.g., report editing, approval capabilities).
- Login Access Policies, password policies, and session settings were enforced for security and role-based control.

5.4 Reports and Dashboards

- Multiple custom reports were built using the Report Builder:
 - Weekly Sales Reports
 - Top Clients by Purchase Value
 - Appointment Trends by Month
 - Loyalty Points DistributionInteractive

Dashboards were created for different departments:

- Sales Dashboard: Total orders, average deal size, completed vs. pending orders
- Marketing Dashboard: Campaign effectiveness, open/click rates
- Client Engagement Dashboard: Repeat visits, appointment ratings

5.5 Lightning Web Component (LWC) Development (Bonus)

- A custom Client Style Summary LWC was developed and embedded on the Client Profile page:
 - Displays style preferences, favorite colors, and past outfit history in a visually appealing card layout.

- Another LWC for Quick Appointment Booking was added to streamline consultant scheduling.

5.6 Lightning Pages

- Record Pages were customized using the Lightning App Builder.
- Components were arranged in multiple columns for:
 - Quick record overview (e.g., Order Status, Delivery Date)
 - Embedded reports and related lists
 - Tabs for Notes, Attachments, and Communication History
- Home Page and App Page were designed to give users quick access to recent records, dashboards, and guided workflows.

Phase 4: Data Migration, Testing & Security

This phase ensured that the CRM system was thoroughly tested, secure, and populated with accurate data from existing sources. It involved migrating essential records, verifying functionalities, securing data access through profiles and permissions, and validating performance through test cases and test classes.

6.1 Data Loading Process :-

To migrate initial records into Salesforce:

Data Import Wizard :

- Used for importing standard objects such as Contacts and Accounts.
- Simple UI-based tool for non-technical users to upload basic records.

Data Loader :

- Used for bulk upload of custom object data such as:
 - Bespoke Orders
 - Appointments
 - Loyalty Points

- Supports large volumes and allows mapping complex fields like lookup and formula fields.

Pre-migration Tasks:

- Data cleaning (duplicates, null values)
- CSV formatting and mapping fields
- Record ownership and lookup relationships ensured

6.2 Field History Tracking, Duplicate Rules & Matching Rules

Field History Tracking:

- Enabled for critical fields like Order Status, Appointment Date, and Client Tier.
- Helps audit changes and monitor user activities.

Duplicate Rules & Matching Rules:

- Matching Rules created for Email and Phone fields to identify duplicates.
- Duplicate Rules triggered warnings during contact and client creation to maintain data integrity.

6.3 Profiles, Roles, Permission Sets & Sharing Rules

Profiles:

- Defined for each team type: Admin, Fashion Consultant, Tailor, Marketing Executive.
- Controlled object-level access (CRUD permissions).

Roles & Role Hierarchy:

- Established as per organizational structure:
 - CEO
 - Operations Manager
 - Department Heads
 - Consultants / Executives
- Ensures data access flows from top to bottom.

Permission Sets:

- Created for special privileges like:
 - Report editing
 - Accessing dashboards
 - Modifying approval processes

Sharing Rules:

- Configured to share Appointment and Order records between consultants and their managers.
- Public read-only access granted for some objects like Style Catalog.

6.4 Test Classes

- Apex test classes were written for all backend logic to ensure code quality and deployment readiness.
- Achieved >85% code coverage, meeting Salesforce best practices.
- Examples:
 - TestOrderTriggerHandler – Validates trigger logic on Bespoke Order creation
 - TestLoyaltyPointsBatch – Tests batch logic for monthly points calculation
 - TestFutureEmailHandler – Verifies @future email execution

6.5 Test Cases (Manual Testing)

Test cases were written and executed for all major CRM functions. Below is a summary of key test categories:

Feature Tested	Input	Expected Output	Status
Booking Creation	New client + selected date/time	Booking record created with reminder email	Passed
Approval Process	Order submitted with discount request	Auto-assigned to Manager for approval	Passed

Task Creation (Automation)	Order status changed to "Ready for Delivery"	Auto task created for delivery follow-up	Passed
Flow Execution	Client fills measurement screen	Measurement stored and appointment updated	Passed
Trigger Behavior	Order completed	Loyalty points updated + confirmation sent	Passed
Duplicate Rule Execution	Create contact with existing phone number	Warning shown, record creation blocked	Passed

Phase 5: Deployment, Documentation & Maintenance

This phase marks the transition of the CRM from development to production. A systematic deployment strategy was followed to ensure a smooth rollout of the HandsMen Threads CRM system. Post-deployment, documentation and maintenance strategies were established to ensure long-term sustainability, usability, and performance monitoring.

7.1 Deployment Strategy :-

To ensure controlled, secure, and error-free deployment of the CRM solution into the production environment, the following strategies were followed:

Deployment Method: Change Sets

- Outbound Change Sets were created in the Sandbox and deployed to Production.
- Deployed components included:
 - Custom Objects, Fields, Validation Rules
 - Flows, Workflow Rules, Approval Processes
 - Apex Classes, Triggers, Test Classes
 - Page Layouts, Lightning Pages, Custom Apps

Other Deployment Tools Used (Optional/Alternate) :

- Salesforce CLI was used for metadata deployment in development phase and future automation.
- Workbench and ANT Migration Tool were explored for large metadata deployments and external integrations (future scalability).

Post-Deployment Testing :

- Regression testing was conducted post-deployment in Production.
- Verified functionalities such as:
 - Record creation
 - Automation triggers
 - Flow behavior
 - Profile permissions

7.2 System Maintenance & Monitoring

Ongoing Maintenance Approach :

- Regular backups of CRM data and metadata.
- Monthly review of:
 - Unused components
 - Field-level usage reports
 - Storage and performance metrics

Performance Monitoring

- Monitoring through Salesforce Setup tools:
 - Debug Logs
 - Scheduled Jobs
 - Email Log Files
- Periodic testing of Flows and Apex jobs using scheduled test classes.

User Feedback Collection :

- Post-deployment user feedback surveys were planned.
- Minor UI/UX adjustments are made based on consultant and manager inputs.

7.3 Troubleshooting & Support Documentation

To ensure consistent system support and issue resolution, the following troubleshooting strategy was documented:

Troubleshooting Process

- Step 1: Replicate the issue in Sandbox using sample/test data.
- Step 2: Analyze using Debug Logs, Flow Errors, or Apex Exception messages.
- Step 3: If automation issue → Check Flow versions, Criteria, Entry Conditions.
- Step 4: If code-related → Use Developer Console to test Apex logs and SOQL queries.
- Step 5: Rollback via backup metadata or deactivate faulty components temporarily.
- Step 6: Document the fix and update admin team via internal log.

Support Documentation Includes:

- User Manual: Step-by-step usage guide for staff
- Admin Guide: Managing automation, users, reports, and objects
- FAQ: For common user errors and system messages
- Maintenance Checklist: Monthly and quarterly tasks

8. Conclusion

The development and implementation of the HandsMen Threads CRM system mark a significant step toward enhancing customer engagement, operational efficiency, and business scalability in the luxury men's fashion sector. This project successfully translated the brand's core values of sophistication, personalization, and quality into a digital platform tailored to meet modern customer expectations.

Through careful planning, modular Salesforce development, user-friendly UI/UX customization, robust security configurations, and automation of key workflows, the CRM now serves as a comprehensive solution for managing client relationships, bespoke orders, and marketing strategies. It empowers sales consultants and managers with real-time insights, simplifies appointment management, and ensures consistent service delivery at every customer touchpoint.

Moreover, the project delivered a scalable and maintainable system with clearly documented processes, security measures, and troubleshooting guidelines. With this CRM in place,

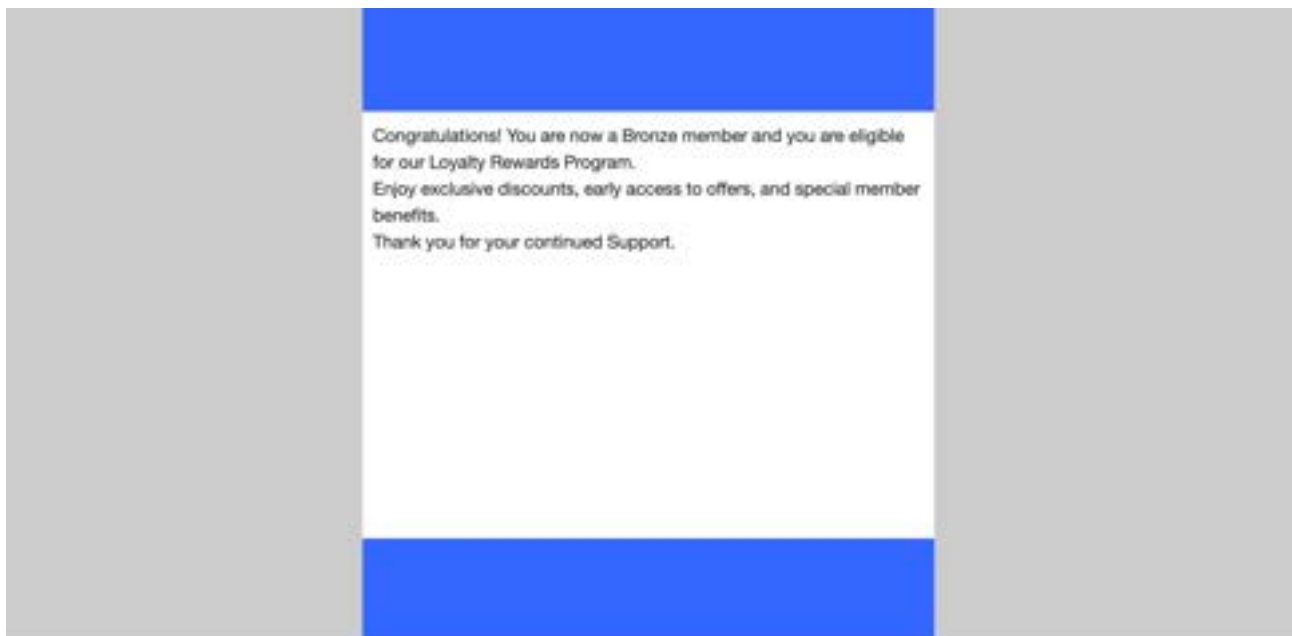
HandsMen Threads is better positioned to grow its customer base, retain loyal clients, and lead innovation in the premium fashion space.

The project objectives have been successfully met, and the system is now ready for real-world use, with plans in place for continuous improvement based on user feedback and evolving business needs.

9. Appendix

Outputs:-

- Loyalty Program Email



- Your Order has been confirmed Email

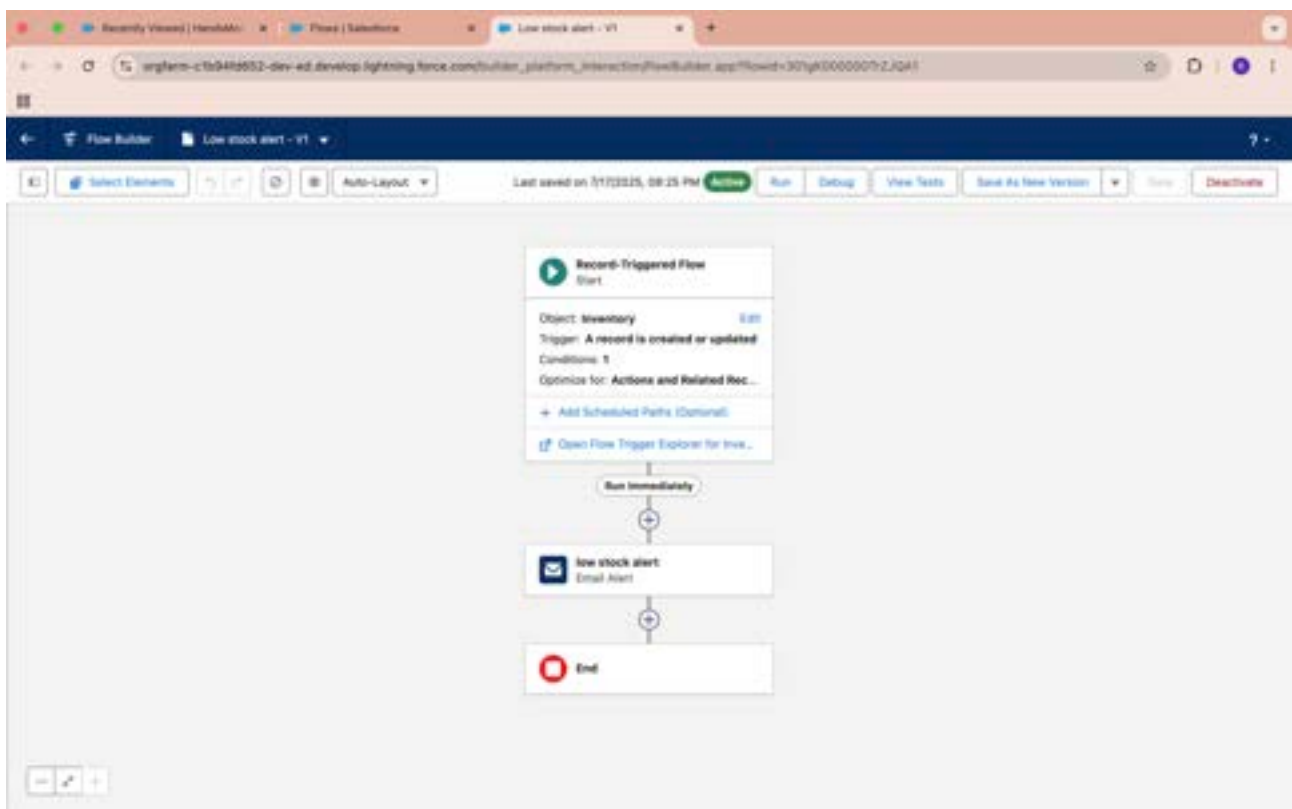


- Low - Stock alert! Email

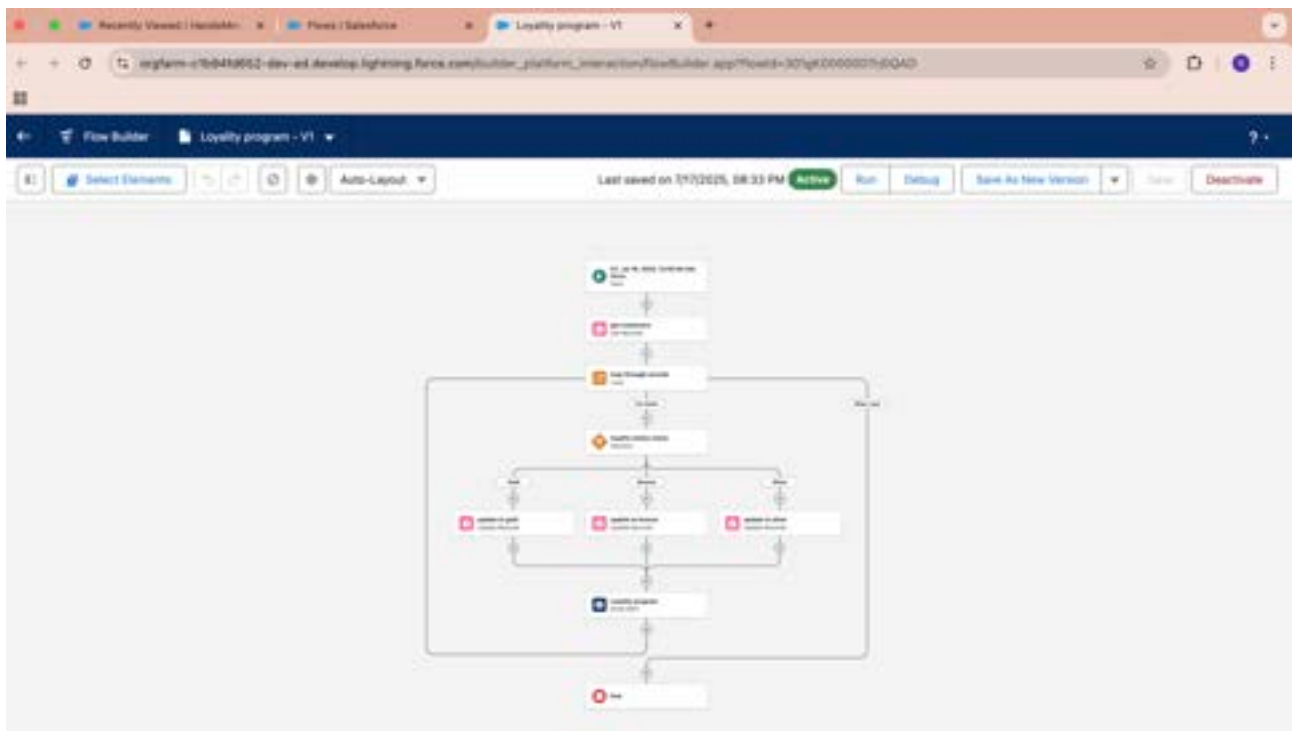


Flows :-

- Low Stock alert - Flow



- Loyalty Program - Flow



- Order confirmation - Flow

