

Detailed Project Documentation

Project Title: HandsMen Threads – Salesforce Project

Domain: Salesforce CRM & Automation

Industry: Fashion & Retail

1. Abstract

HandsMen Threads is a premium men's fashion brand that strives to deliver sophistication and elegance to its customers. To remain competitive and deliver exceptional experiences, the company required a **Salesforce-based digital transformation**. This project leverages Salesforce to centralize customer and order data, automate workflows, manage loyalty programs, and provide real-time insights.

The implementation ensures better operational efficiency, enhanced customer engagement, and intelligent decision-making for business growth.

2. Objectives

The key objectives of the project are:

1. **Centralized Data Management:** Consolidate customer, order, and inventory data within Salesforce for better accessibility and security.
 2. **Process Automation:** Automate repetitive workflows such as order confirmations, stock alerts, and loyalty updates.
 3. **Enhanced Customer Experience:** Deliver instant communication and personalized loyalty programs to customers.
 4. **Real-Time Insights:** Enable leadership teams with dashboards and reports to track performance and make informed decisions.
 5. **Scalability:** Build a system that can scale with increasing product lines and customer base.
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3. Technology Description

The project leverages Salesforce's platform capabilities combined with automation and custom development:

- **Salesforce Lightning App:** Used to design a user-friendly and modern interface for business users.
- **Record-Triggered Flows:** Implemented for instant automation of processes (e.g., order confirmations, stock alerts).
- **Apex Triggers:** Applied to implement custom business logic such as loyalty tier upgrades.
- **Batch Apex:** Handles bulk updates for large records like inventory adjustments.
- **Scheduled Apex:** Automates nightly batch jobs to update inventory and financial records.

- **Validation Rules:** Ensures data quality and prevents incorrect entries.
 - **Lightning App Builder:** Used for custom UI components, dashboards, and page layouts.
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4. Custom Objects

To model the business data, the following **custom objects** were created:

1. **Customer** – Stores customer details such as name, email, and loyalty tier.
 2. **Order** – Represents purchase orders placed by customers.
 3. **Product** – Contains details of fashion items available for sale.
 4. **Inventory** – Tracks stock levels and alerts when stock is low.
 5. **LoyaltyTier** – Defines loyalty program levels and benefits.
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5. Object Relationships

- **Customer → Order** (One-to-Many): A customer can place multiple orders.
- **Order → Product** (Many-to-One): Each order corresponds to a product.
- **Customer → LoyaltyTier** (One-to-One): Each customer belongs to one loyalty tier.

This data model ensures that customer activity is directly tied to their purchase history and loyalty rewards.

6. Key Features

1. **Automated Order Confirmations** – Customers receive instant confirmation emails after placing an order.
 2. **Dynamic Loyalty Program** – Customer loyalty tier is updated automatically based on total purchases.
 3. **Proactive Stock Alerts** – Inventory team is notified when stock falls below 5 units.
 4. **Scheduled Bulk Updates** – Nightly batch jobs update stock levels and generate financial reports.
 5. **Real-Time Dashboards** – Provides insights into customer activity, sales, and inventory health.
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7. Data Flow & Automation

- **Order Placement:** Triggers email confirmation via Flows.
- **Customer Purchase History:** Updates loyalty tier through Apex Trigger logic.
- **Stock Monitoring:** Flows alert inventory teams for restocking.

- **Nightly Processing:** Scheduled Apex runs daily sync jobs for large record updates.
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8. Learning Outcomes

Through this project, the following key learnings were achieved:

- Designing **scalable Salesforce data models**.
 - Automating workflows using **Flows** and **Apex**.
 - Enforcing **data integrity** with validation rules.
 - Writing **asynchronous processes** using Batch and Scheduled Apex.
 - Building engaging **Lightning UI apps** for improved usability.
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9. Conclusion & Future Scope

The project successfully improved efficiency in customer management, sales tracking, and inventory handling for HandsMen Threads.

Future Enhancements:

- AI-driven personalization using **Salesforce Einstein**.
 - Integration with external **e-commerce platforms**.
 - Advanced predictive analytics for customer trends and fashion demand.
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10. References

- Salesforce Developer Guide.
- Trailhead modules on Flows, Apex, and Data Modeling.
- HandsMen Threads business workflow documentation.