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

Salesforce CRM Documentation

Project Overview

HandsMen Threads is a bespoke Salesforce CRM application tailored for a luxury men's fashion brand. The platform is designed to automate essential processes such as order lifecycle management, inventory tracking, and customer engagement using a combination of Apex triggers, Flows, validation rules, and custom objects. This system promotes operational agility while minimizing manual dependencies.

Objectives

- Streamline key tasks like order confirmations and loyalty tier adjustments using automation.
- Improve cross-departmental productivity in sales, inventory handling, and marketing campaigns.
- Prevent manual data entry issues with enforced validations and guided workflows.
- Enable leadership to make timely decisions with updated and scalable CRM insights.

Phase 1: Requirement Analysis & Planning

- Recognized vital components to track, including HandsMen_Customer_c, HandsMen_Order_c, HandsMen_Product_c, inventory records, and marketing campaigns.
- Constructed relational data models via Lookup and Master-Detail relationships.
- Designed custom field types including picklists, formulas, and currencies.
- Outlined all business rules, process automations, and validation requirements.

Phase 2: Salesforce Development – Backend & Configurations

- Created custom objects and fields using the Salesforce Object Manager.
- Developed advanced Flows to implement business processes and approvals.
- Wrote Apex classes to encapsulate custom logic for order processing and inventory updates.
- Crafted dynamic Email Templates for automated communication.
- Configured Flow-based email actions to ensure real-time customer and manager notifications.

Phase 3: UI/UX Development & Customization

- Customized app tabs and branding via App Manager to enhance navigation and visual appeal.
- Built intuitive Lightning Record Pages and Page Layouts for better user interactions.
- Added custom validation messages that guide users during data entry.
- Ensured a fluid and modern UI experience by aligning with Salesforce Lightning Design System.

Phase 4: Data Management, Testing & Security

- Entered sample data across all custom objects to simulate real-world scenarios.
- Conducted unit testing of Flows, Apex logic, and data processes.
- Performed role-based UI/UX testing to validate user access and behavior.
- Validated data integrity during sandbox-to-production migration.
- Applied assertions in test methods to confirm logic correctness and achieved over 85% code coverage.

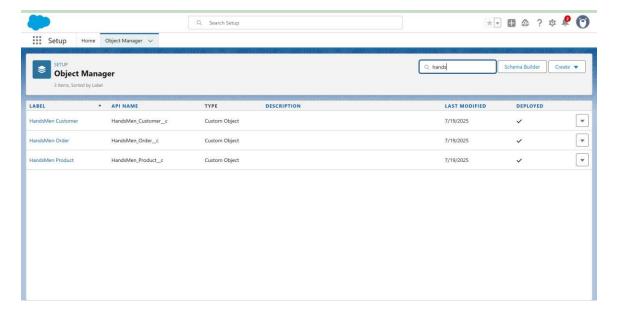
Phase 5: Deployment, Documentation & Maintenance

- Used Salesforce CLI and SFDX for versioned and repeatable deployments.
- Set up Git repositories for source control and collaboration.
- Stored screenshots, metadata files, and documentation in GitHub for easy team access.

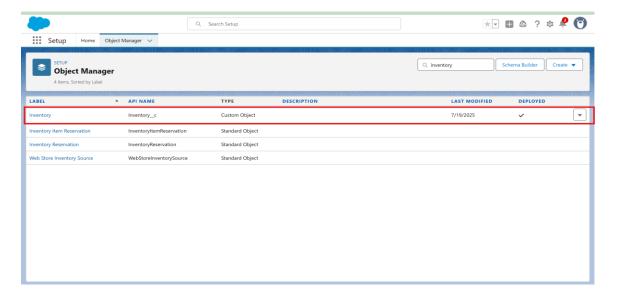
Detailed Implementation & Configuration

Objects

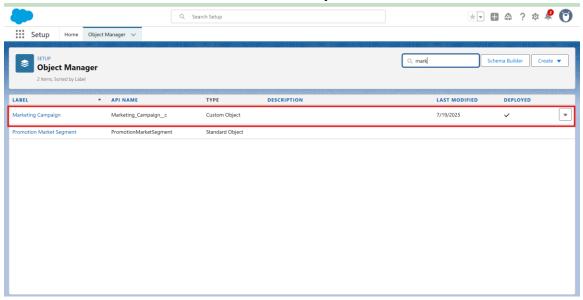
- **HandsMen_Customer_c**: Stores customer contact details, loyalty ranks, and preferences to enable personalized engagement and service tracking.
- **HandsMen_Product_c**: Stores product details like fabric, size, price, and availability for creating orders and managing inventory.
- **HandsMen_Order_c**: Tracks each order's status, selected products, and total amount, linking customers with inventory and email automation.



• **Inventory**: Manages stock levels, warehouse location, and real-time availability for effective supply chain operations.

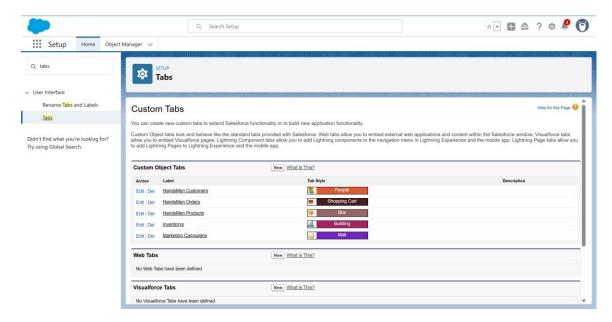


• Marketing_Campaign_c: Captures marketing data including campaign type, audience, and timeframes for automation and analytics.



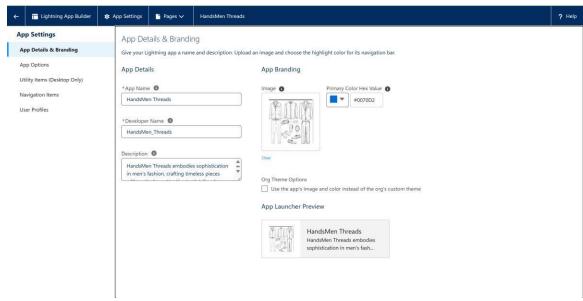
Tabs

• **Tab - HandsMen Customer**: A direct tab to access HandsMen_Customer_c records, streamlining customer interaction workflows.



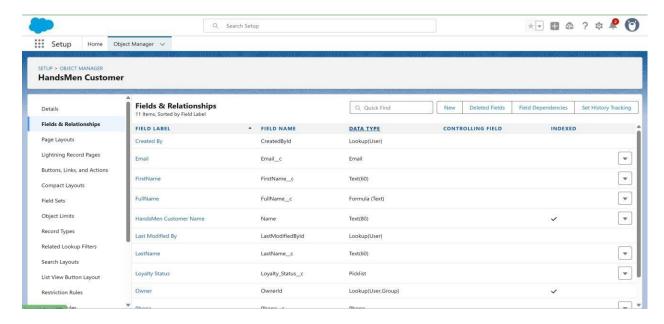
App Manager

• **App - HandsMen Threads**: A unified Salesforce Lightning App that organizes all objects like orders, customers, inventory, and marketing within a single interface

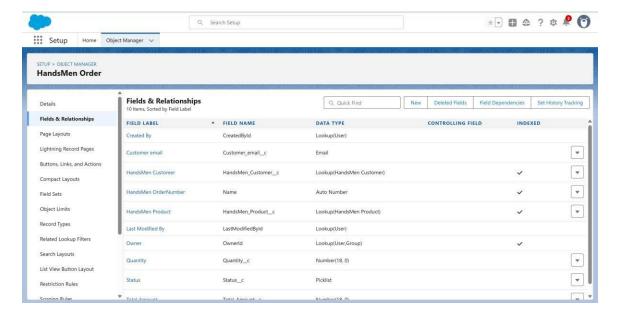


Fields

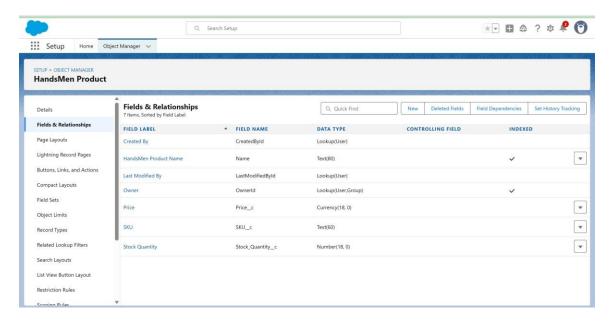
HandsMen Customer:Stores key customer information such as name, contact details, loyalty status, and style preferences to enable personalized service and communication.



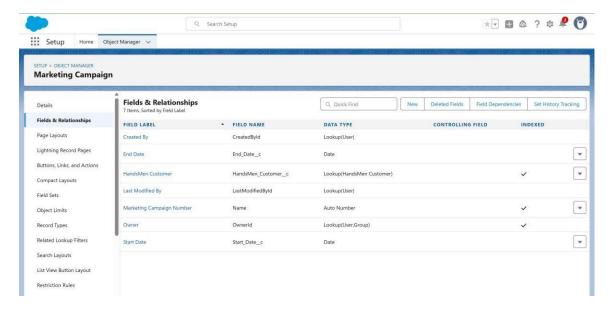
HandsMen Order: Captures all order-related details including order date, selected product, quantity, total amount, and order status for accurate processing and tracking.



HandsMen Product: Defines core product attributes like name, fabric type, size, price, and availability to support product management and inventory linkage.

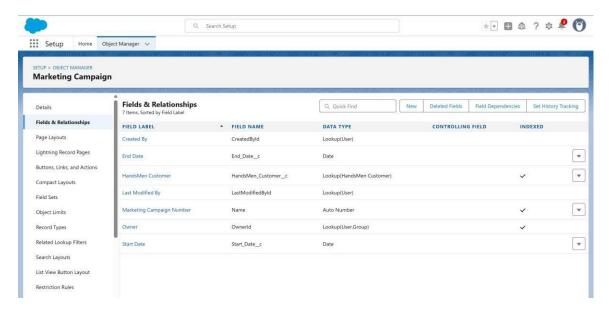


Inventory: Manages stock-related data including product reference, stock quantity, status, and warehouse location to ensure real-time inventory control.



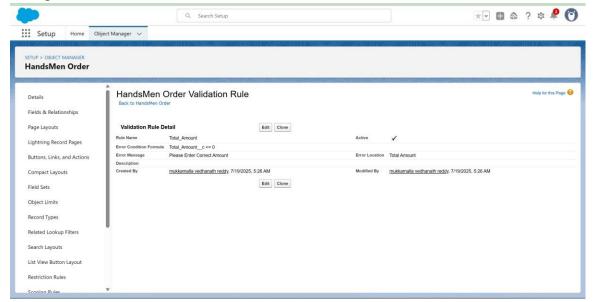
Marketing Campaign

Contains campaign-specific fields like campaign name, duration, target audience, and type to plan, execute, and analyze marketing initiatives.

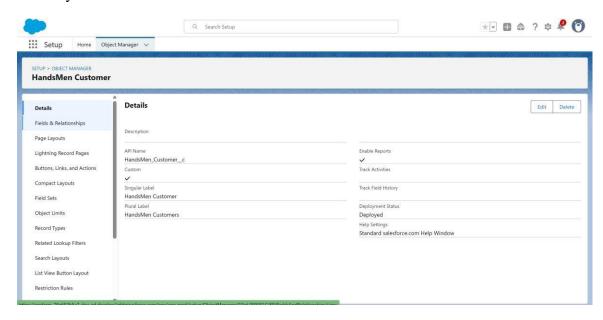


Validation Rules

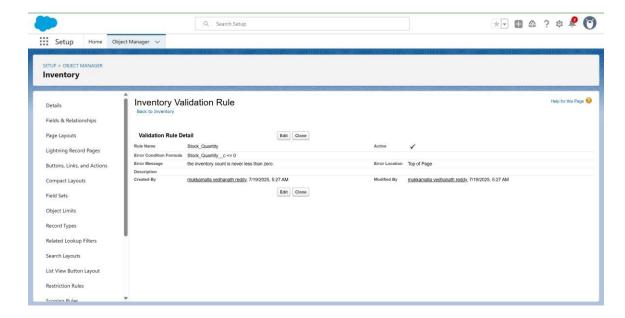
HandsMen Order: Restricts invalid entries like negative quantities or missing product lookups.



• **HandsMen Customer**: Ensures email and phone fields are mandatory and correctly formatted.



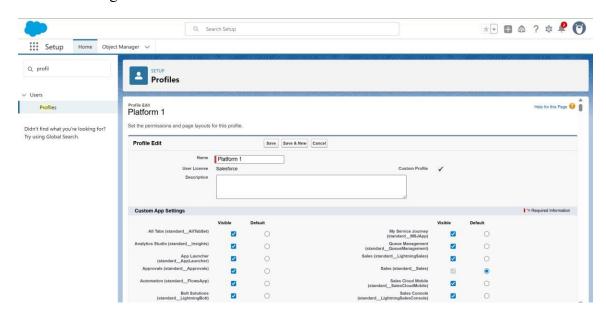
• **Inventory**: Prevents invalid stock entries such as zero or negative stock quantity values.



Data Security

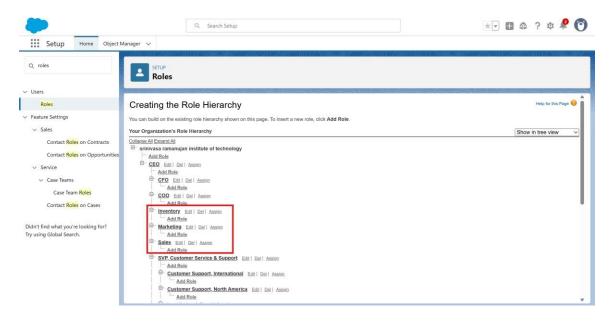
Profiles

• Sales: Allows access to Orders and Customers only, with restrictions on admin or backend settings.



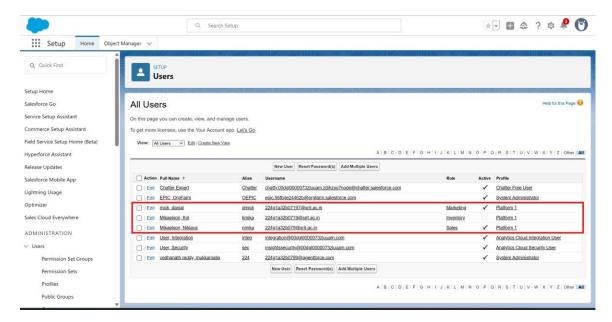
Roles

• Sales, Inventory Manager, Marketing Manager: Configured to enable appropriate data access and reporting hierarchies.



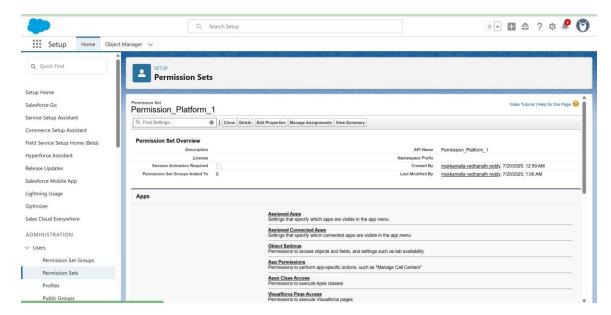
Users

• Niklaus, Kol, Loretta Daniel: Sample users representing different departments for realistic access testing.



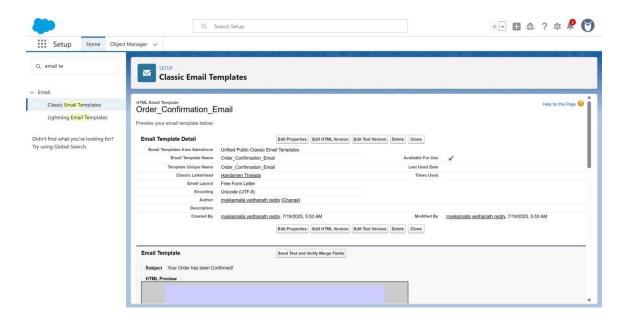
Permission Sets

• **Permission_Platform_1**: Grants advanced access to specific users, such as editing inventory or accessing campaign metrics, beyond their base profile.

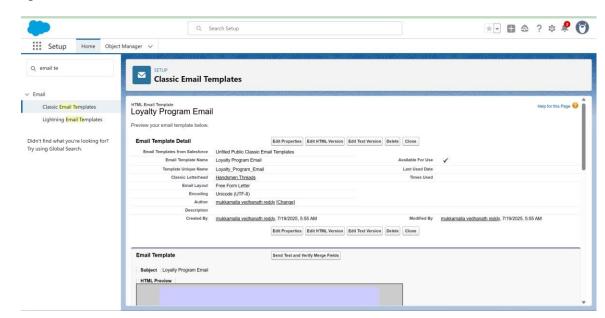


Email Templates & Alerts

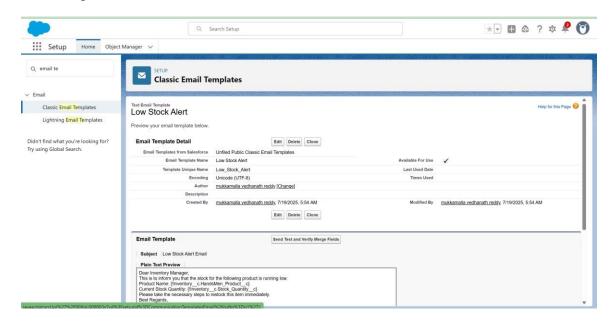
• Order Confirmation Email Template: Sent post-order creation with purchase details.



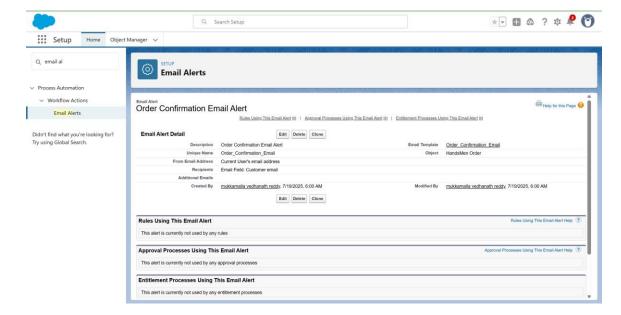
• Loyalty Email Template: Notifies users when their loyalty level or reward tier is updated.



• Low Stock Alert Email Template: Sent to managers when product stock falls below a specified limit.

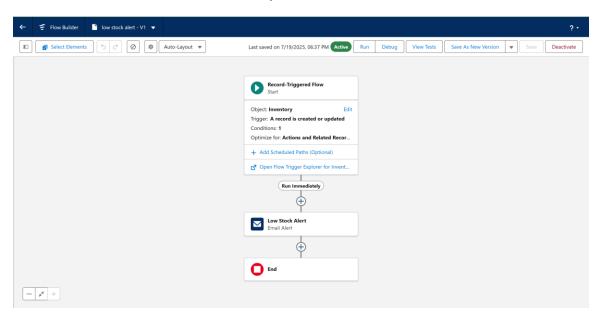


• **Email Alert for Order Confirmation**: Ensures automated delivery of order confirmation emails immediately after order entry.

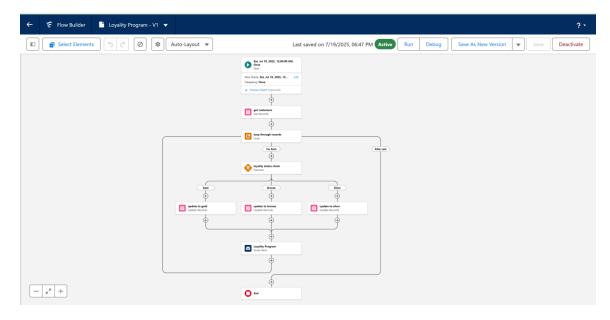


Flows

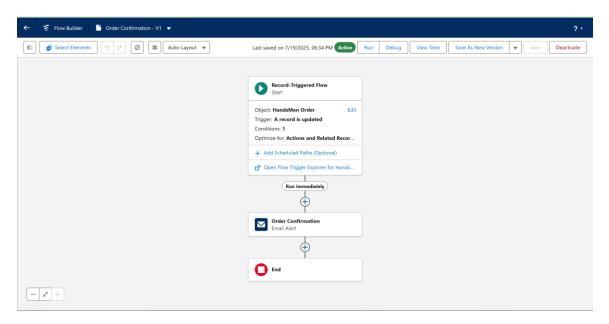
• Stock Alert Flow: Detects low inventory and initiates alerts.



• Loyalty Status Flow: Analyzes purchase history to upgrade loyalty levels automatically.

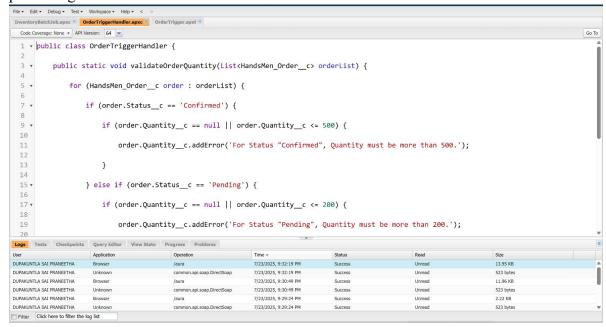


• Create Order Confirmation Email Flow: Populates and sends order confirmation without user intervention.

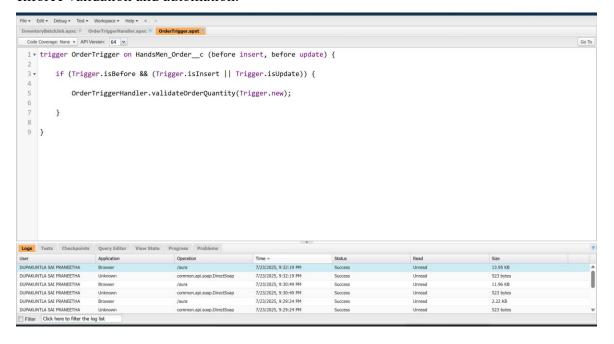


Automation Using Apex

 OrderTriggerHandler Apex Class: Central handler for custom order logic, promoting maintainable code.

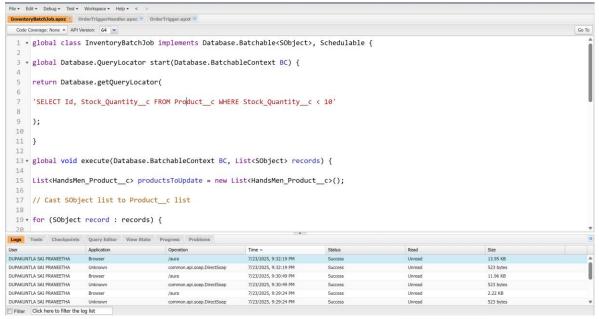


• OrderTrigger Apex Trigger: Calls the handler during record creation/update to enforce validation and automation.



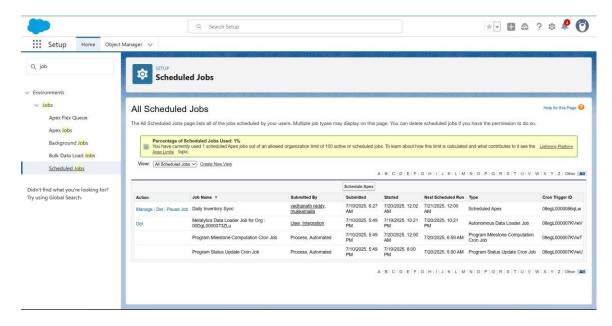
Batch Job

• **InventoryBatchJob**: Handles bulk inventory updates, low stock detection, and record auditing in scheduled cycles.



Scheduled Job

• **Scheduled Job**: Triggers the batch job at intervals (daily/weekly) to ensure inventory is current.



Future Enhancements

1. AI-Powered Recommendations:

Leverage Salesforce Einstein to suggest outfits and accessories based on customer preferences and purchase history.

2. AR Virtual Try-On (Meta Threads™):

Enable customers to preview and try outfits virtually in 3D using their smartphones for a premium shopping experience.

3. VIP Loyalty Portal:

Offer exclusive access to premium clients with early product releases, personalized rewards, and private style consultations.

4. Social Messaging Integration:

Integrate WhatsApp and Instagram for instant promotions, order confirmations, and real-time customer engagement.

5. Self-Service Returns & Exchanges:

Automate return and exchange requests via Salesforce Flow, allowing customers to manage processes independently.

6. Global Multilingual & Currency Support:

Expand internationally with support for local languages and currencies in CRM workflows and communication templates.

Conclusion

HandsMen Threads is a forward-thinking Salesforce CRM system tailored for the premium fashion industry. It balances automation, user experience, and real-time intelligence to support dynamic business operations. Its architecture is ready to evolve with next-gen AI and AR capabilities, securing its place as a digital luxury service platform.