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.
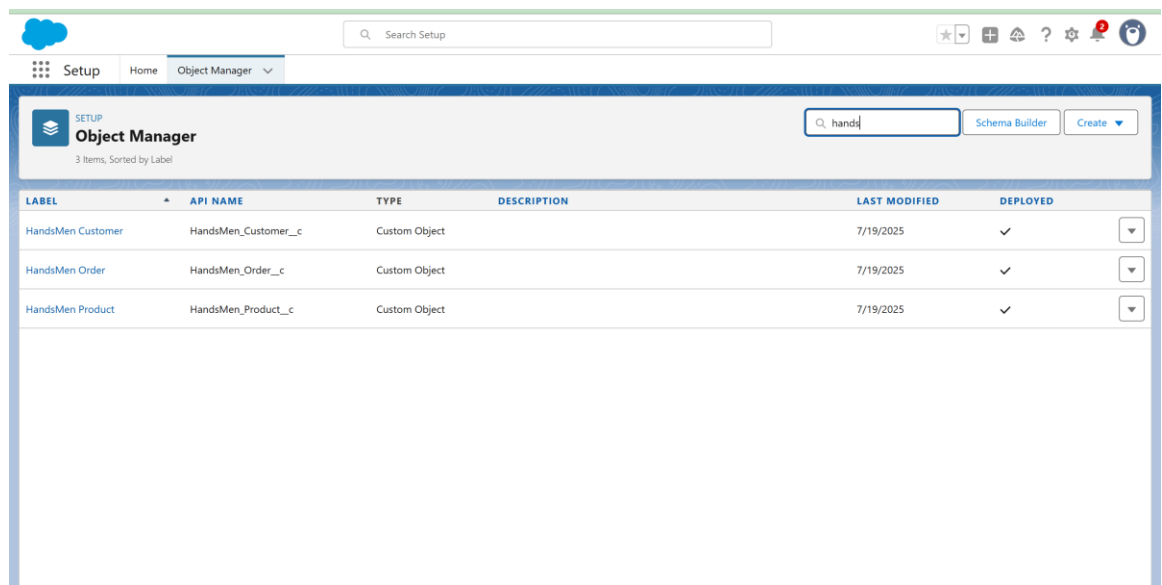
Phase 5: Deployment, Documentation & Maintenance

- 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
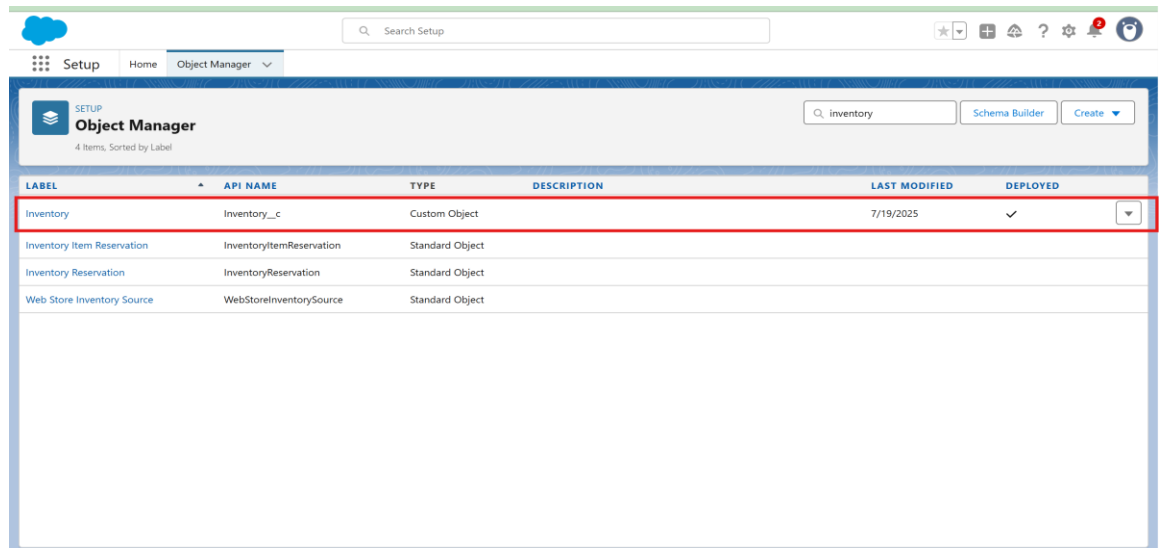
- **HandsMen_Customer__c**: Stores customer contact details, loyalty ranks, and preferences to enable personalized engagement and service tracking.

- **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.
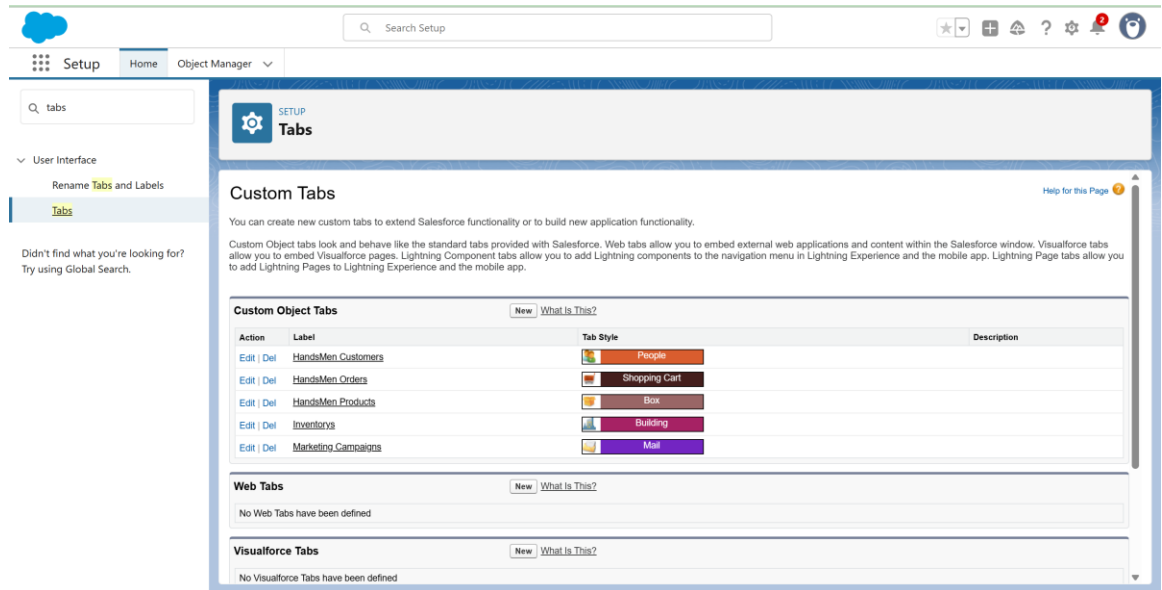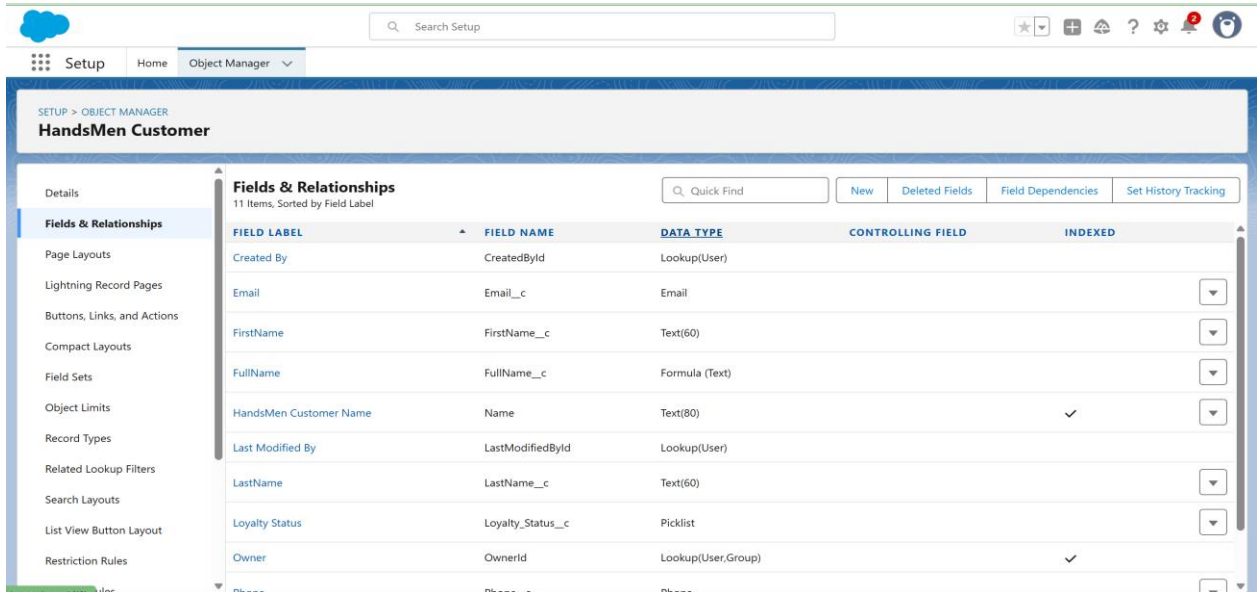
App Manager

- **App - HandsMen Threads**: A unified Salesforce Lightning App that organizes all objects like orders, customers, inventory, and marketing within a single interface
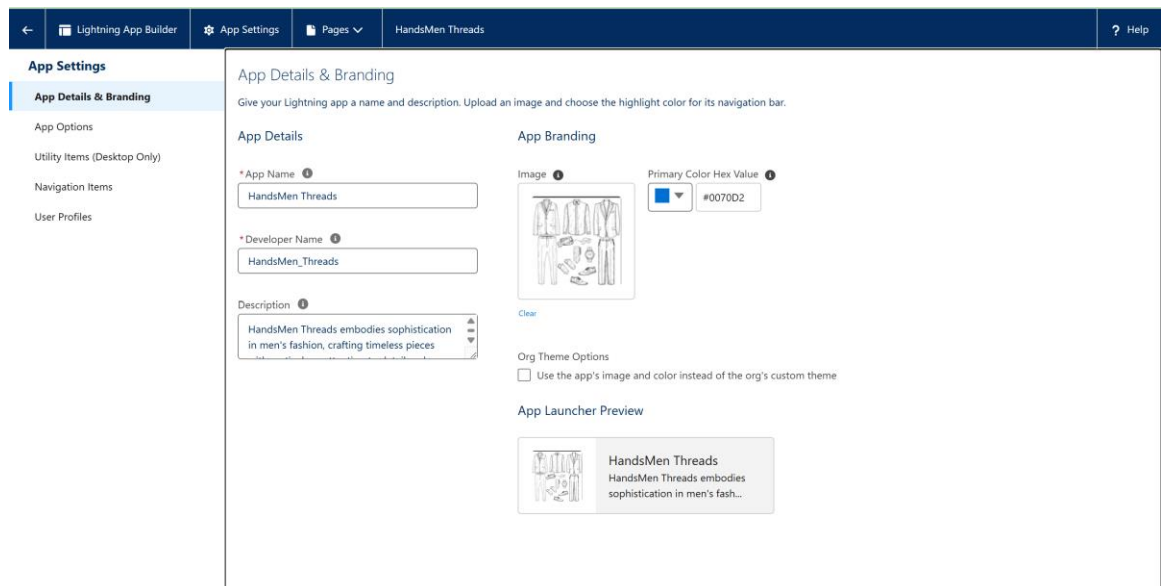
Fields
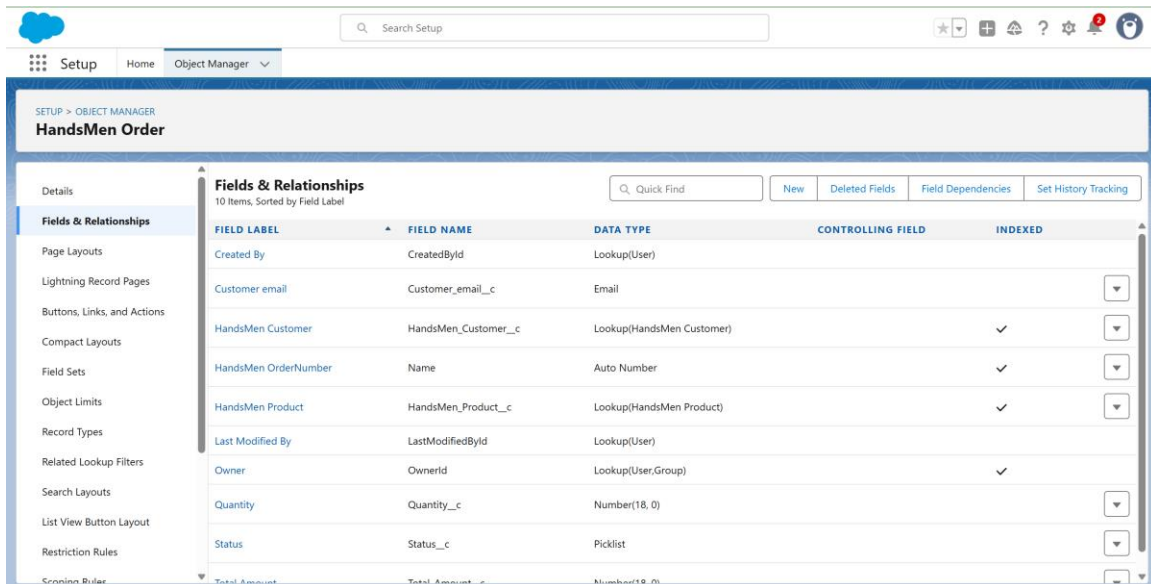
HandsMen Customer:Stores key customer information such as name, contact details, loyalty status, and style preferences to enable personalized service and communication.

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.
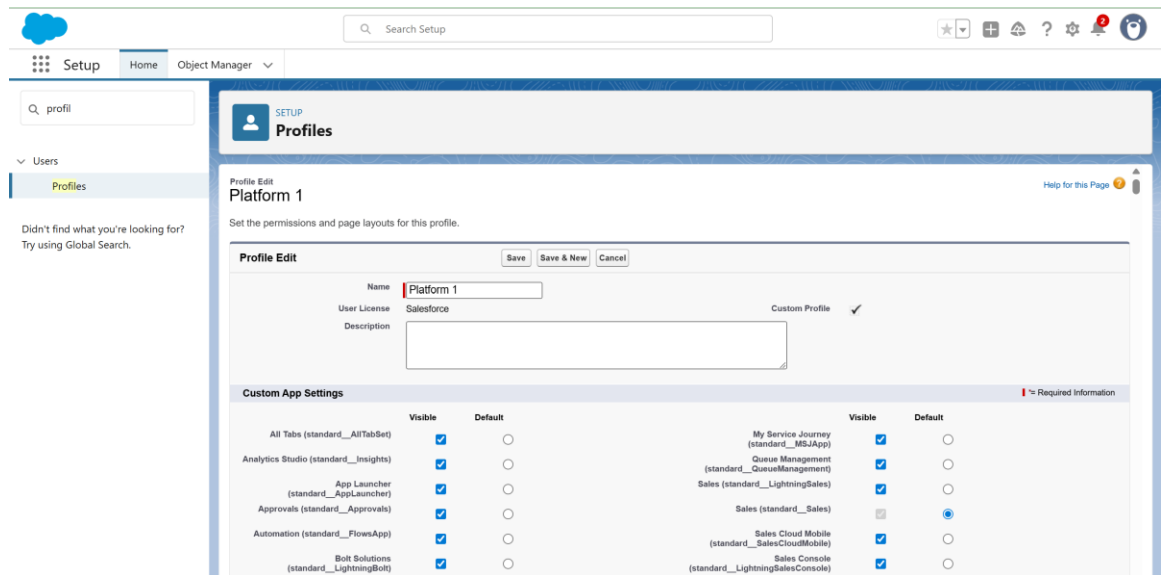
Roles

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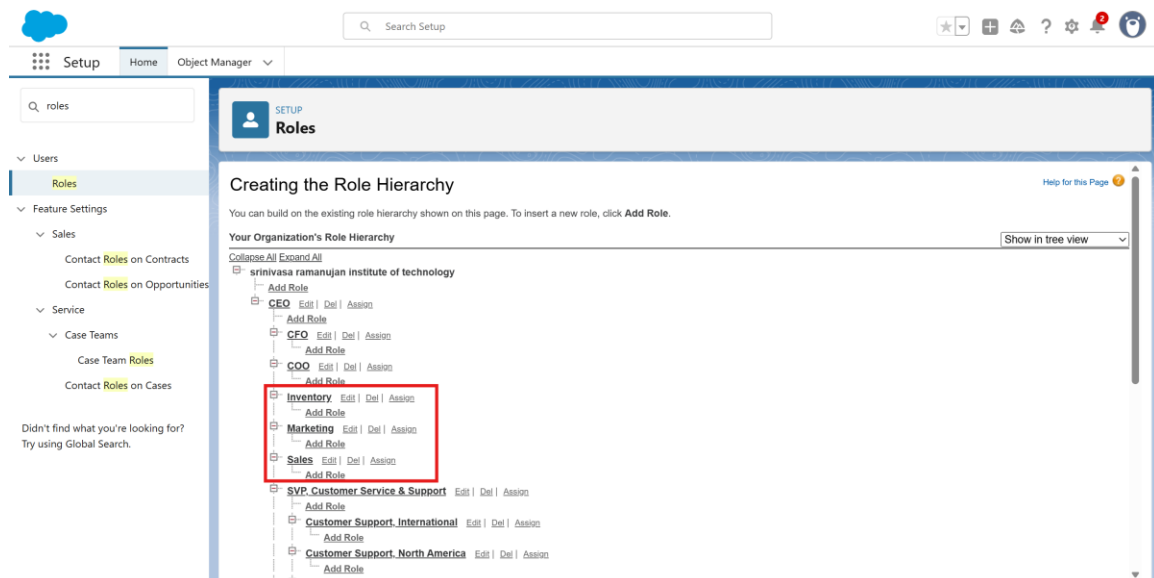
Users

- **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.
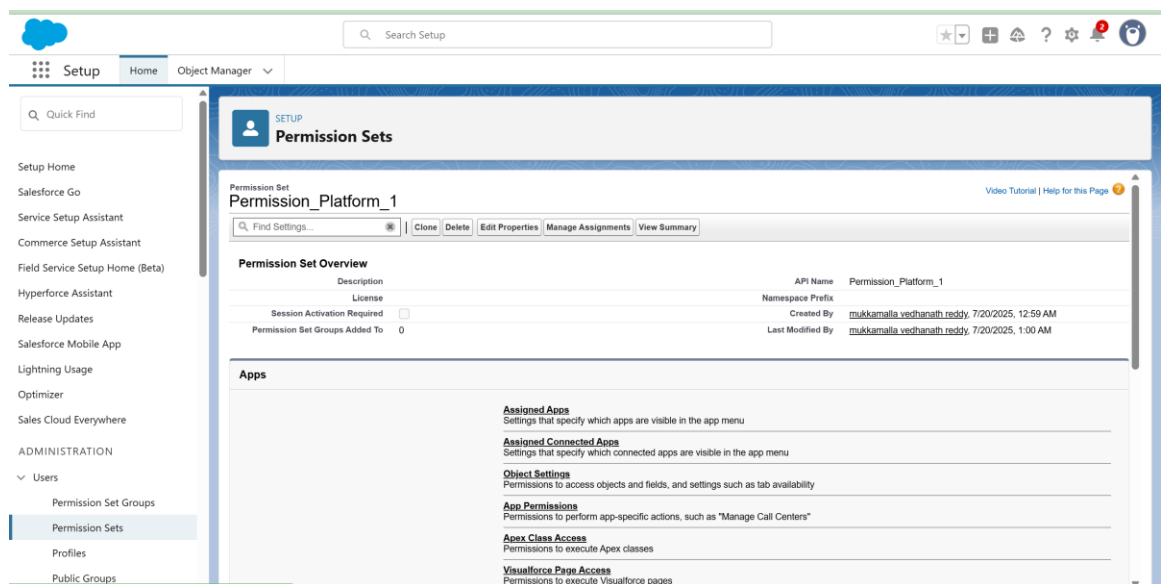
Email Templates & Alerts

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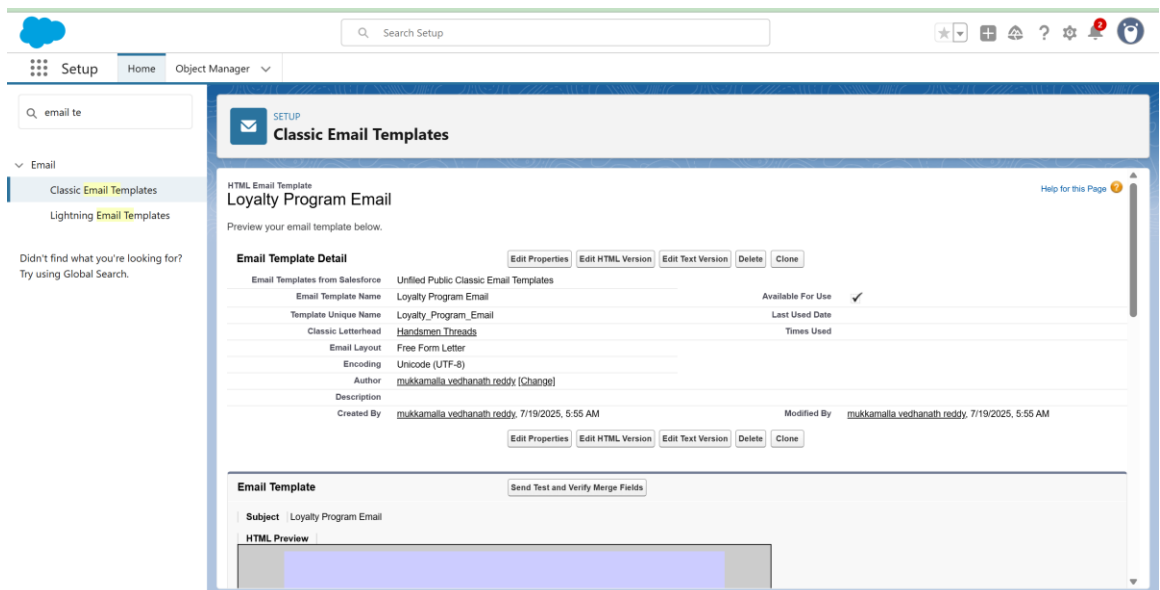
- **Low Stock Alert Email Template**: Sent to managers when product stock falls below a specified limit.
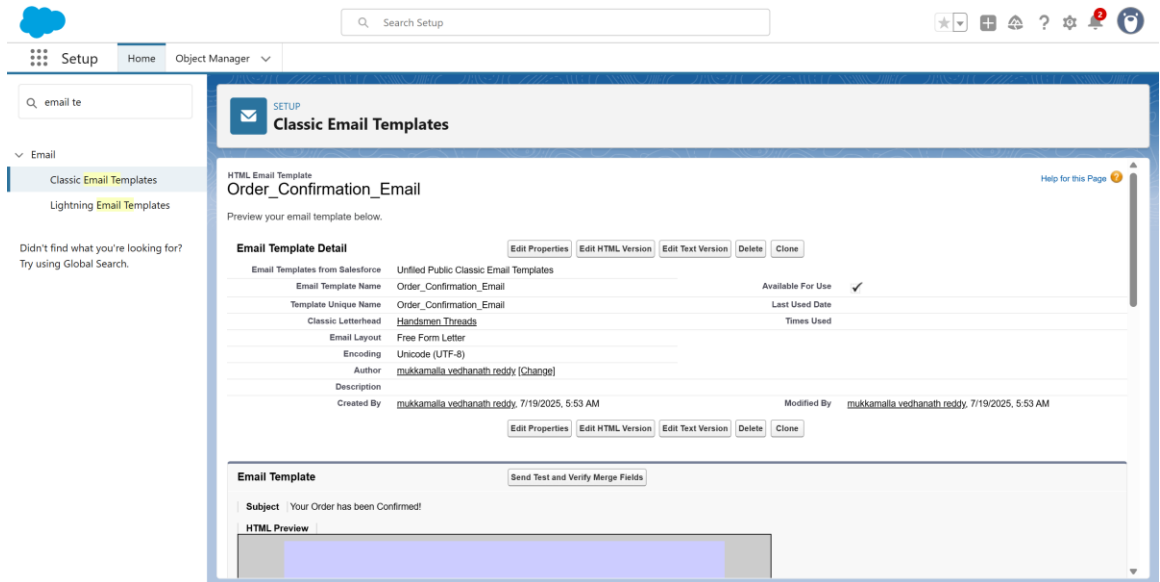

- **Email Alert for Order Confirmation**: Ensures automated delivery of order confirmation emails immediately after order entry.

Flows

- **Stock Alert Flow**: Detects low inventory and initiates alerts.
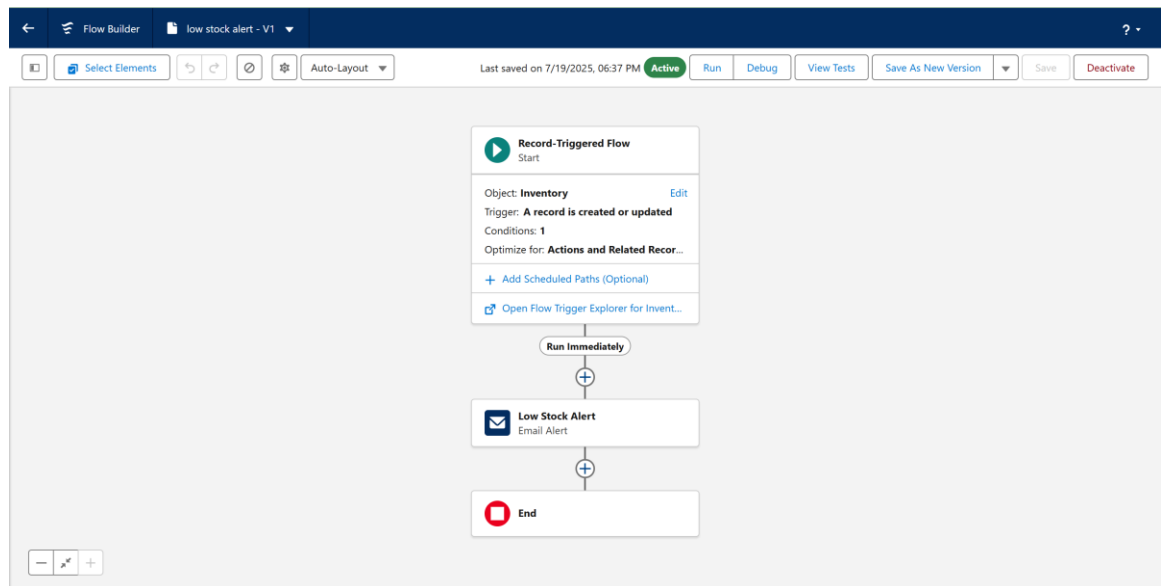
- **Loyalty Status Flow**: Analyzes purchase history to upgrade loyalty levels automatically.
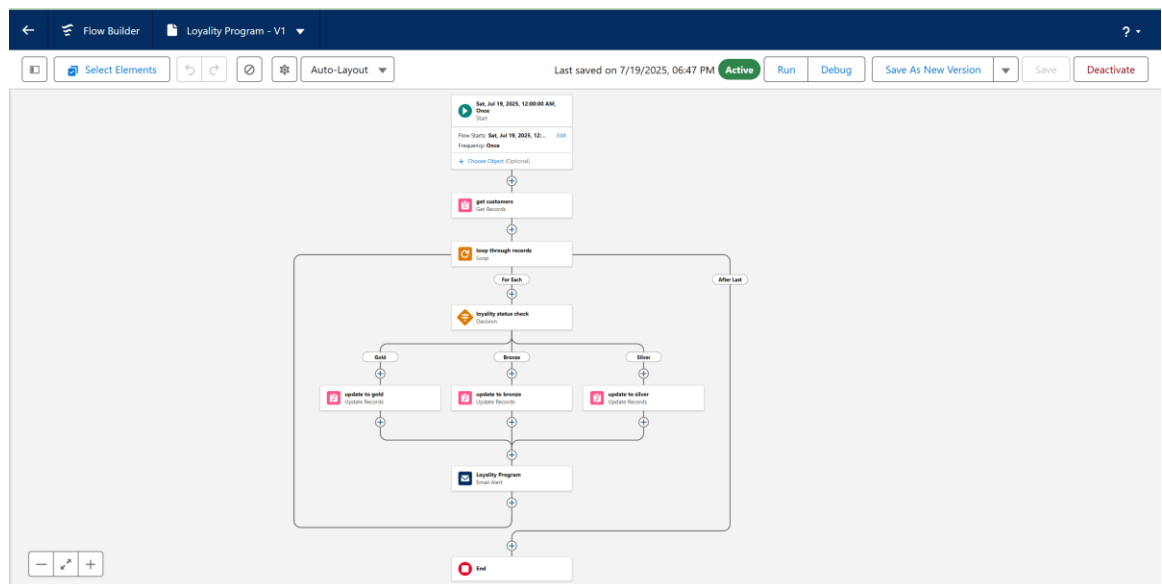
- **Create Order Confirmation Email Flow**: Populates and sends order confirmation without user intervention.
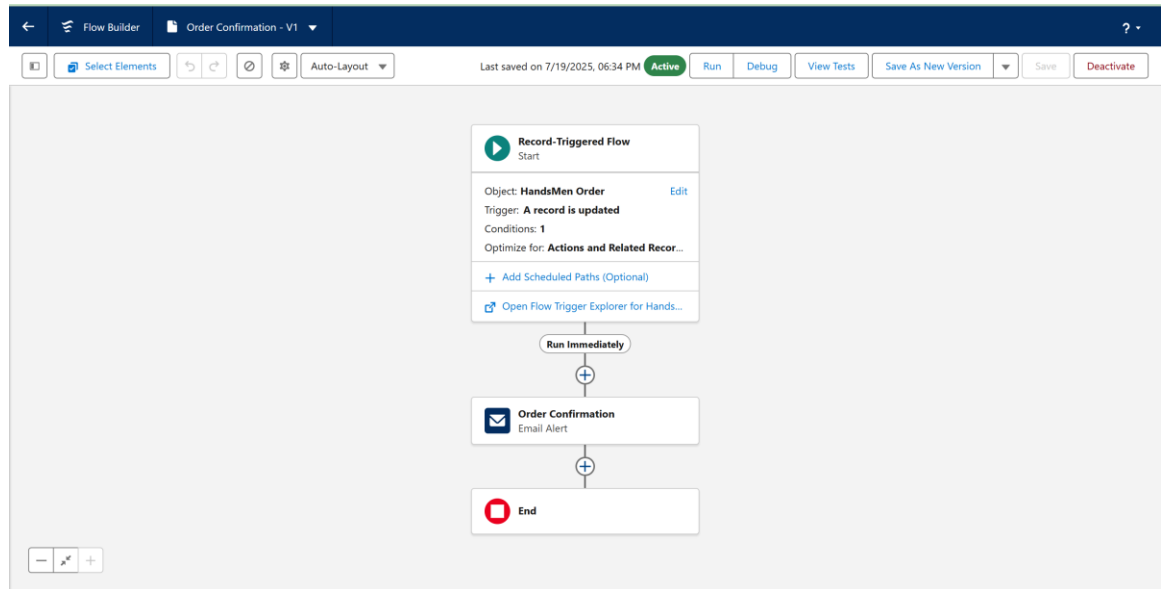
Automation Using Apex

- **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.


```
File ▾   Edit ▾   Debug ▾   Test ▾   Workspace ▾   Help ▾   <   >
OrderTrigger.apxt
Code Coverage: None  ▾   API Version:  64  ▾                                        Go To

1 ▾ trigger OrderTrigger on HandsMen_Order__c (before insert, before update) {
2
3 ▾     if (Trigger.isBefore && (Trigger.isInsert || Trigger.isUpdate)) {
4
5             OrderTriggerHandler.validateOrderQuantity(Trigger.new);
6
7         }
8
9   }

Logs   Tests   Checkpoints   Query Editor   View State   Progress   Problems
User                    Application         Operation       Time ▾       Status        Read         Size

☐ Filter   Click here to filter the log list
```

Batch Job

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


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InventoryBatchJob.apxc
Code Coverage: None  ▾   API Version:  64  ▾                                        Go To

1 ▾ global class InventoryBatchJob implements Database.Batchable<SObject>, Schedulable {
2
3 ▾ global Database.QueryLocator start(Database.BatchableContext BC) {
4
5   return Database.getQueryLocator(
6
7   'SELECT Id, Stock_Quantity__c FROM Product__c WHERE Stock_Quantity__c < 10'
8
9   );
10
11  }
12
13 ▾ global void execute(Database.BatchableContext BC, List<SObject> records) {
14
15  List<HandsMen_Product__c> productsToUpdate = new List<HandsMen_Product__c>();
16
17  // Cast SObject list to Product__c list
18

Logs   Tests   Checkpoints   Query Editor   View State   Progress   Problems
User                    Application         Operation       Time ▾       Status        Read         Size

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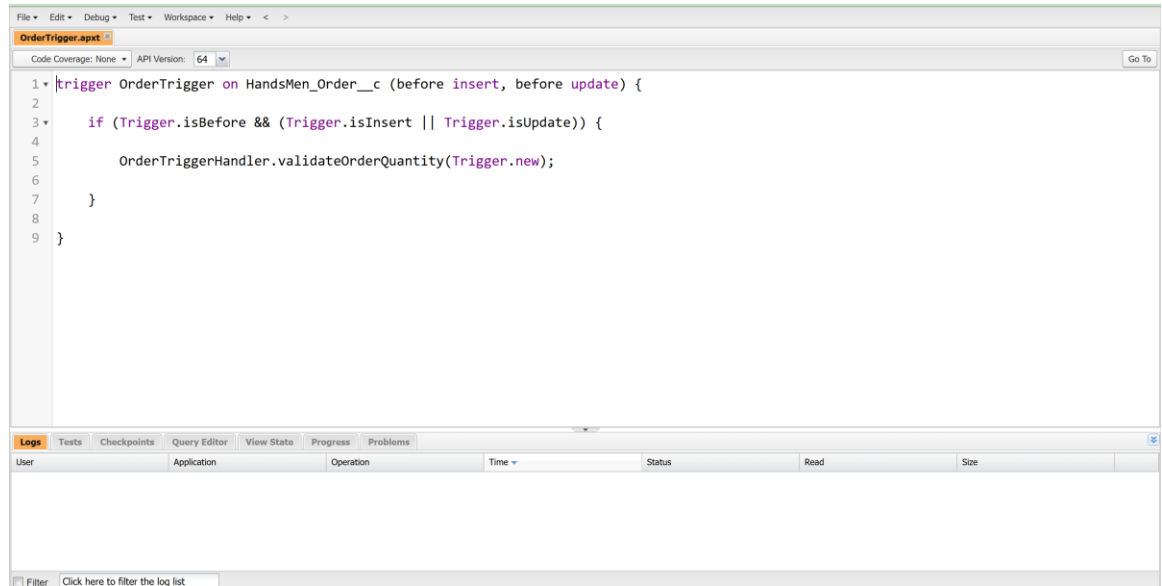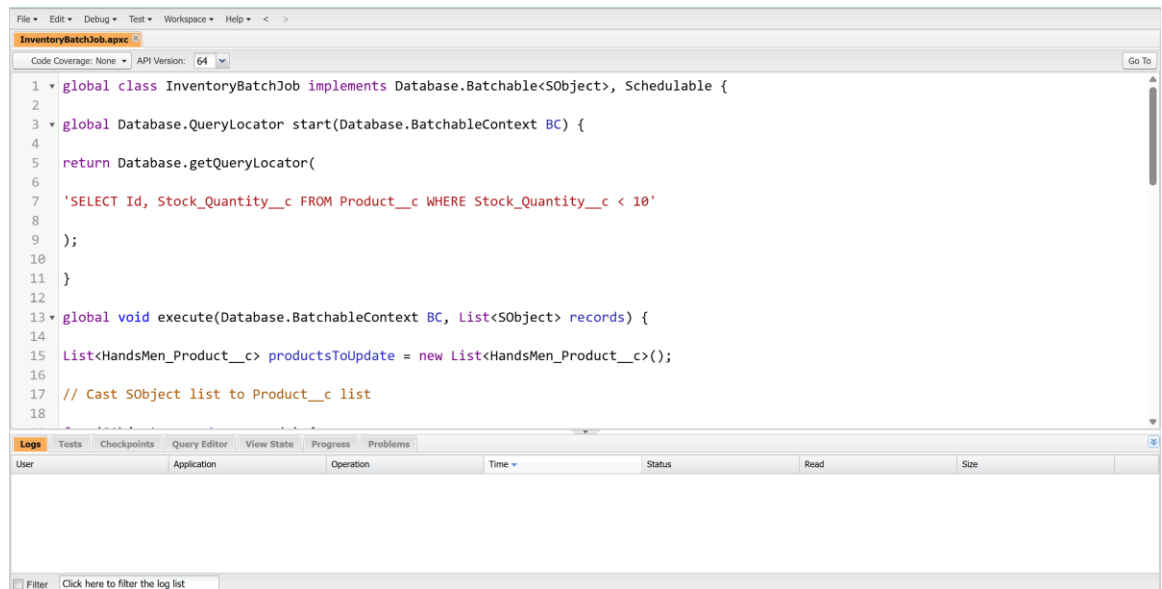
Scheduled Job

- **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.