HandsMen Threads: Elevating the Art of Sophistication in Men's Fashion– Salesforce Project Documentation

Project Overview

HandsMen Threads, a fashion brand, has implemented a Salesforce CRM solution to improve business efficiency across customer, order, and inventory management. This documentation provides an end-to-end overview of the system's configuration, automation, and security setup.

Project Phases

• Phase 1: Architecture &Planning

- Defined custom objects, relationships, fields, formula fields.

- Validation rules, flows, Apex triggers, and batch jobs were established.

- Email templates were designed for communication.

• Phase 2: Development

- Created objects and fields.

- Implemented automation and batch jobs.

- Configured email templates and notifications.

- Defined data security roles and sharing rules.

• Phase 3: Testing & QA

- Conducted unit and end-to-end testing.

- Validated performance and security.

• Phase 4: Deployment & Training

- Deployed to production.

  - Provided user training and post-go-live support.

Technology Description

- **Salesforce CRM**:
  The central platform used for storing, managing, and processing data related to customers, orders, products, inventory, and campaigns. It provides a unified interface for all business operations.

- **Custom Objects**:
  Five custom objects were created: HandsMen Customer, HandsMen Product,

HandsMen Order, Inventory, and Marketing Campaign. These objects structure the data specifically for HandsMen Threads' workflow.

- **Lightning App Builder**:
  Used to create a custom app interface named **HandsMen Threads** with relevant tabs. It improves user accessibility and navigation across records.

- **Record-Triggered Flows**:
  These flows automate real-time processes such as sending order confirmation emails or notifying the warehouse team when stock is low.

- **Scheduled Flows**:
  Run daily at midnight to process time-based actions—like updating customer loyalty status based on total purchases.

- **Apex Classes**:
  Custom logic was added using Apex classes. For example:
  - OrderTriggerHandler validates order quantity.
  - InventoryBatchJob restocks inventory automatically when levels drop.

- **Apex Triggers**:
  Triggers apply business rules when records are inserted or updated, ensuring data compliance and automation execution.

- **Classic Email Templates**:
  Pre-designed HTML templates are used to send confirmation emails to customers, alert the warehouse about stock levels, and communicate loyalty updates.

- **Validation Rules**:
  Enforce data integrity at the field level. For instance, ensuring the order total is greater than zero, stock cannot be negative, and customer emails follow a valid format.

- **Profiles and Roles**:
  Security is managed through a custom profile (Platform 1) and a hierarchical role structure (Sales, Inventory, Marketing under CEO). Permissions and access are defined to ensure each user only sees or edits what they are authorized for.

Data Model

Custom Objects:
- **HandsMen Customer__c**: Name, Email, Phone, Loyalty_Status__c, Total_Purchases__c, Full_Name__c (Formula)
- **HandsMen Product__c**: Name, SKU, Price, Stock_Quantity__c
- **HandsMen Order__c:** Order Number (Auto Number), Status, Quantity, Total_Amount__c
- **Inventory__c: Inventory** Number, Stock_Quantity__c, Stock_Status__c (Formula)

- **Marketing Campaign__c**: Campaign Number, Campaign Name

Relationships:
- HandsMen Order → HandsMen Customer (Lookup)
- HandsMen Product → HandsMen Order (Lookup)
- Inventory → HandsMen Product (Master-Detail)

Security Configuration
- **Profile:** Platform 1 (Cloned from Standard User) with object permissions for Product and Inventory.
- **Roles**: Sales, Inventory, Marketing (under CEO).
- **Users**: 4 users assigned specific roles and profiles.
- **Permission Set**: Permission_Platform_1 with CRUD access to HandsMen Customer and HandsMen Order.
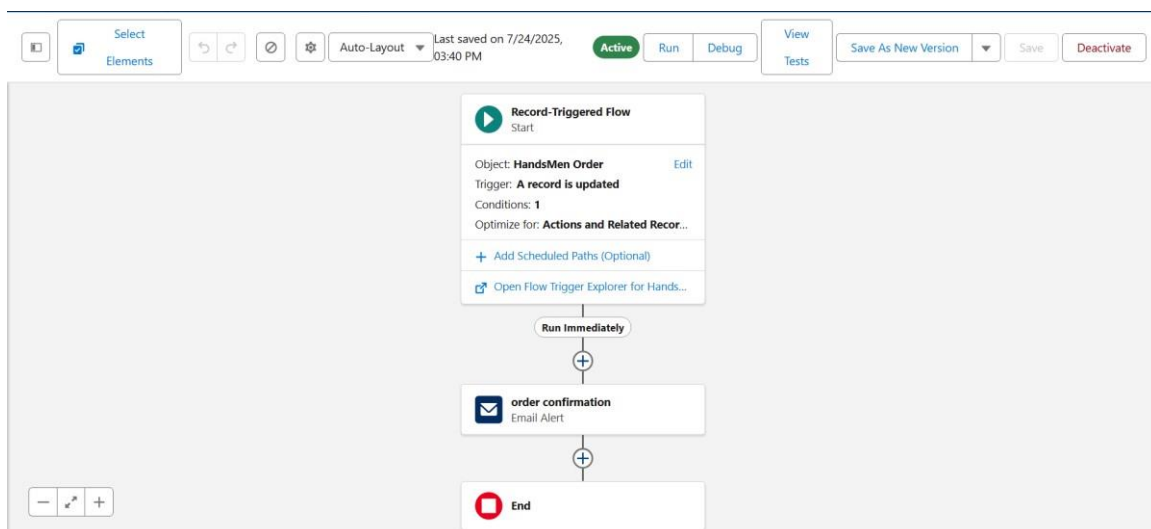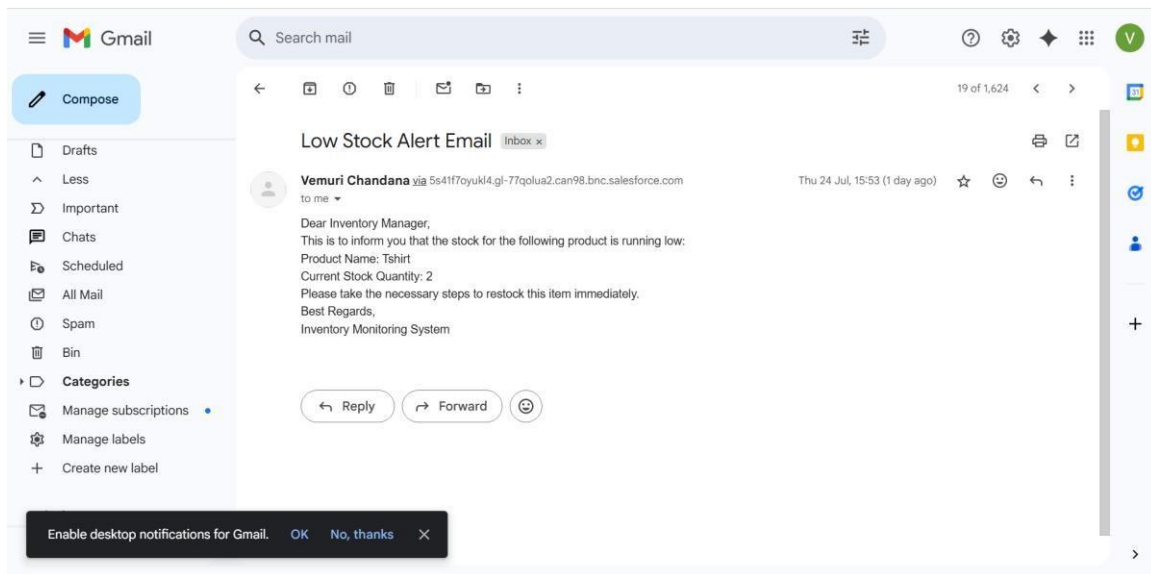
Automation & Validation
- **Validation Rules:**
- Order Total must be > 0.
- Inventory Quantity must be ≥ 0.
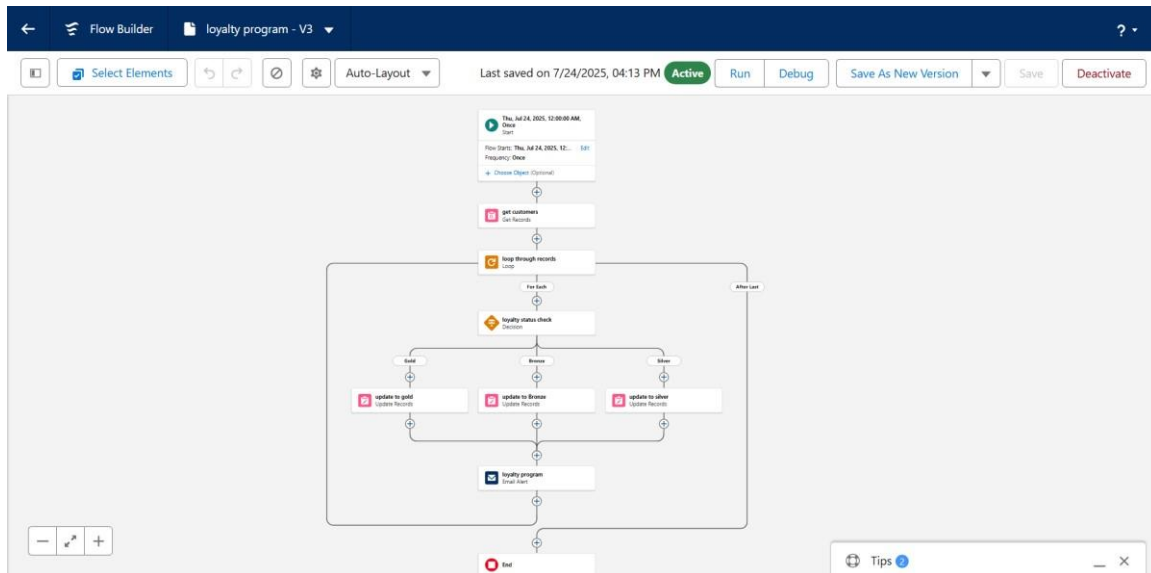- Email must contain "@gmail.com".

- **Flows**:
- **Order Confirmation Flow**: Sends email when status = Confirmed.

- **Stock Alert Flow**: Triggers when stock < 5.

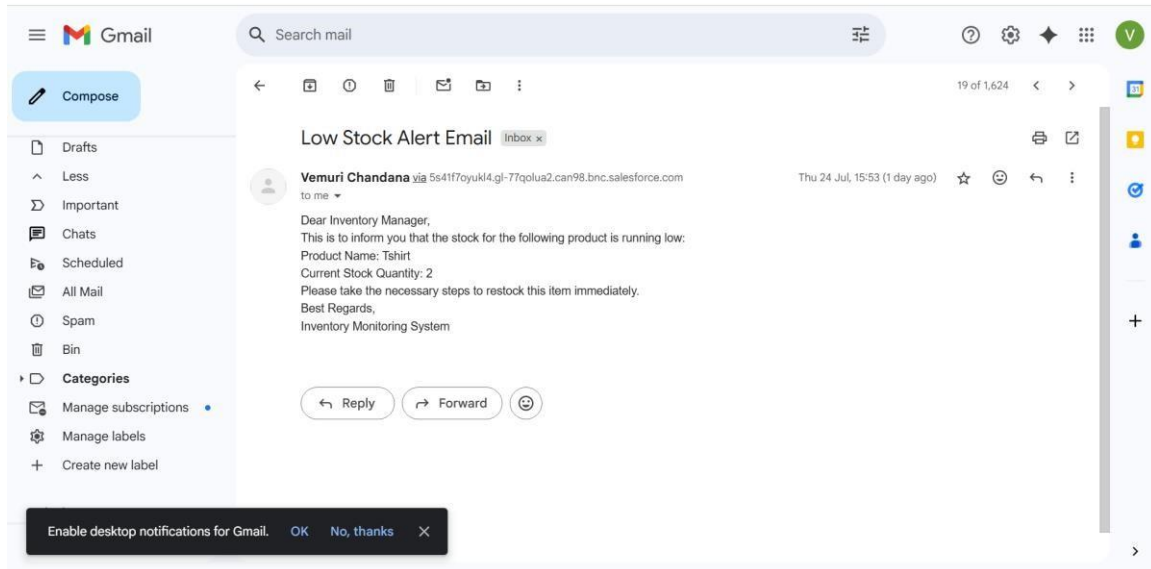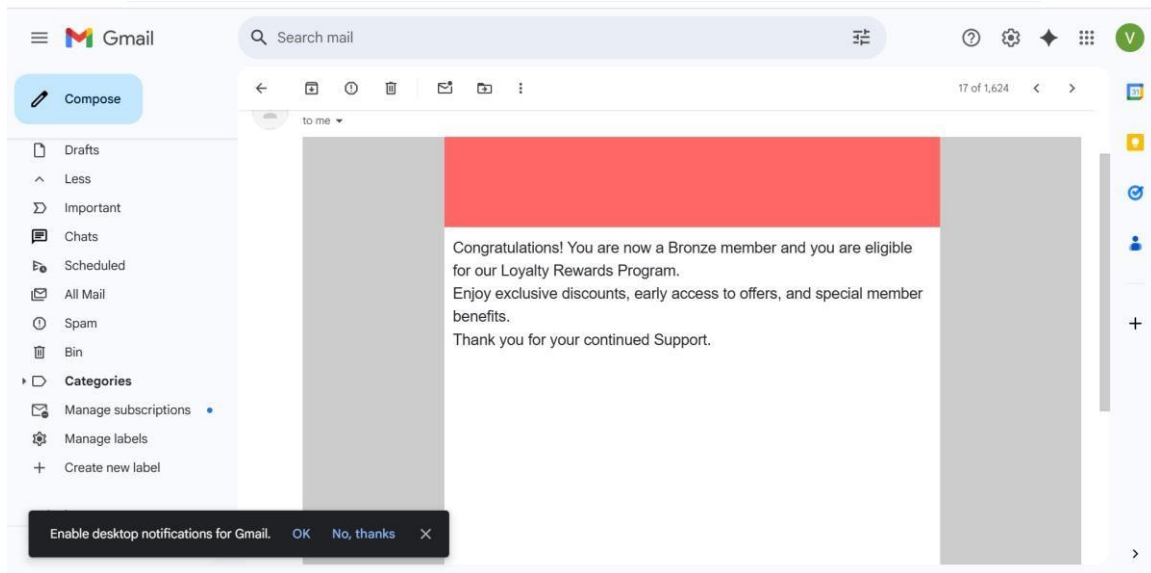- **Loyalty Flow**: Scheduled daily to update loyalty status.

• **Apex:**
- OrderTrigger & OrderTriggerHandler: Validate order quantity by status.
- InventoryBatchJob: Restocks product when quantity < 10, scheduled daily.

Email Templates

• Order Confirmation Email

• **Low Stock Alert Email**

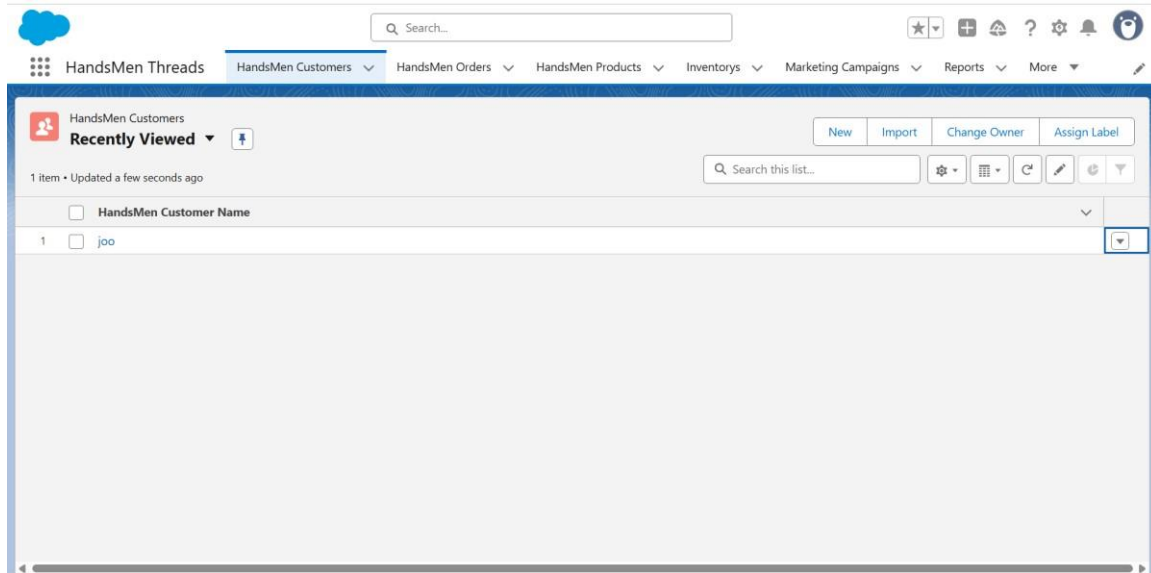• **Loyalty Program Email**

Each template is tied to email alerts triggered by flows and Apex.

Lightning App Setup

App Name: HandsMen Threads

Tabs Included: HandsMen Customer, Product, Order, Inventory, Marketing Campaign, Reports, Dashboards, Accounts, Contacts.

Deployment Checklist

✓ Custom Objects Created

✓ Relationships Configured

✓ Fields and Formula Fields Created

✓ Validation Rules Tested

✓ Flows and Apex Activated

✓ Email Templates Deployed

✓ Users, Profiles, Roles Configured

✓ Lightning App Built and Deployed

Real-World Example (Use Case)

Company: HandsMen Threads — a mid-sized Indian fashion brand selling ethnic wear and casual outfits through retail outlets and online channels.

Challenge: HandsMen Threads faced difficulties in managing their growing customer base, tracking orders, monitoring stock levels across stores, and engaging loyal customers. Manual processes were leading to delays in order confirmations, inventory mismatches, and ineffective loyalty program tracking.

Solution with Salesforce: A custom Salesforce CRM solution was implemented to digitize and automate their operations:
- Customers are stored in a custom object with details like email, phone, and loyalty status.
- Products are managed in a structured catalog with stock quantity.
- Orders link to both customer and product, tracking quantity and amount.
- Inventory is automatically restocked via a batch job when stock levels fall below 10 units.
- A record-triggered flow sends order confirmation emails to customers when the status is changed to "Confirmed".
- A scheduled flow updates loyalty status daily based on total purchase amount.
- Validation rules prevent invalid data entries like negative stock or incorrect email formats.

Business Outcome:
- 40% reduction in order processing delays.
- Zero stockout events due to proactive alerts.
- 2x increase in returning customers through automated loyalty tiering.

Conclusion

The HandsMen Threads Salesforce CRM Project demonstrates how a fashion brand can optimize its business operations through automation, custom object modeling, and proactive communication. By leveraging tools like Apex, Flows, Validation Rules, and Lightning Apps, HandsMen Threads was able to:
- Increase operational efficiency
- Improve customer satisfaction
- Ensure data accuracy across departments

This implementation sets the foundation for future scalability and innovation.