

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

Report on Salesforce CRM Implementation

ABSTRACT

This project implemented a customized Salesforce CRM solution for HandsMen Threads, a premium men's fashion and tailoring brand. The goal was to streamline business operations, enhance customer engagement, and ensure data integrity across departments.

Key aspects include creation of five core custom objects (Customer, Order, Product, Inventory, Marketing Campaign), automation of business processes with Flows and Apex, validation rules for data accuracy, and role-based security to protect data. This solution improves operational efficiency and lays a scalable foundation for growth.

OBJECTIVES

Develop a centralized CRM system to manage customers, orders, products, inventory, and marketing campaigns.

Automate processes such as order confirmations, loyalty status updates, and stock alerts.

Ensure accurate and consistent data entry via validation rules.

Provide real-time visibility of inventory and customer interactions.

Improve team collaboration through role-based access control.

Deliver personalized customer experiences with targeted communications and loyalty programs.

TECHNOLOGY OVERVIEW

Salesforce CRM Platform

A cloud-based Customer Relationship Management platform that allows businesses to manage sales, service, marketing, and operations from a unified interface. It supports scalability, integration, and customization using both declarative and programmatic tools.

Key Salesforce Features Used:

- **Custom Objects & Tabs:** Custom data structures tailored to the unique needs of HandsMen Threads, allowing precise data capture and easy access through UI tabs.
- **Lightning App Builder:** Enables creation of responsive, user-friendly apps with drag-and-drop components that improve user experience and operational efficiency.
- **Validation Rules:** Enforce business logic and data quality at the point of entry, reducing errors and inconsistencies.
- **Profiles & Roles:** Provide layered security models — profiles define what users can do, while roles control what records users can see.
- **Permission Sets:** Allow additional granular permissions to be granted to users without changing their base profiles.
- **Email Templates & Alerts:** Facilitate automatic, consistent, and personalized communication with customers and team members.
- **Flow Automation:** Advanced automation capability allowing declarative process automation without writing code, used for sending notifications, updating records, and orchestrating multi-step processes.
- **Apex Programming:** Salesforce's proprietary language used to build complex business logic, triggers, batch jobs, and integrations beyond what is available purely through declarative tools.

PROJECT EXECUTION

1. Developer Org Setup

Created a Salesforce Developer Org for solution development and configuration.

2. Custom Object Creation

Defined and implemented five custom objects:

- Customer (email, phone, loyalty status)
- Product (SKU, price, stock)
- Order (quantity, status, total amount)
- Inventory (stock quantity, warehouse location)
- Marketing Campaign (promotions, scheduling)

3. Lightning App Creation

Designed the HandsMen Threads Lightning App consolidating relevant tabs and assigned it to the System Administrator profile.

4. Validation Rules Implementation

- Order Total Amount cannot be zero (error message if invalid).
- Customer email must include “@gmail.com” (error on violation).

5. User Roles and Profiles

Created new user profiles and roles for Sales Manager, Inventory Manager, Marketing to control access to data and functionality.

6. User Creation & Permissions

Users like Niklaus Mikaelson (Sales) and Kol Mikaelson (Inventory) were created and assigned appropriate roles/profiles.

7. Email Templates and Alerts

Developed templates for Order Confirmations, Low Stock Alerts, and Loyalty Program notifications; linked with Email Alerts triggered by Flows.

8. Flow Automation and Apex Triggers

Screenshots

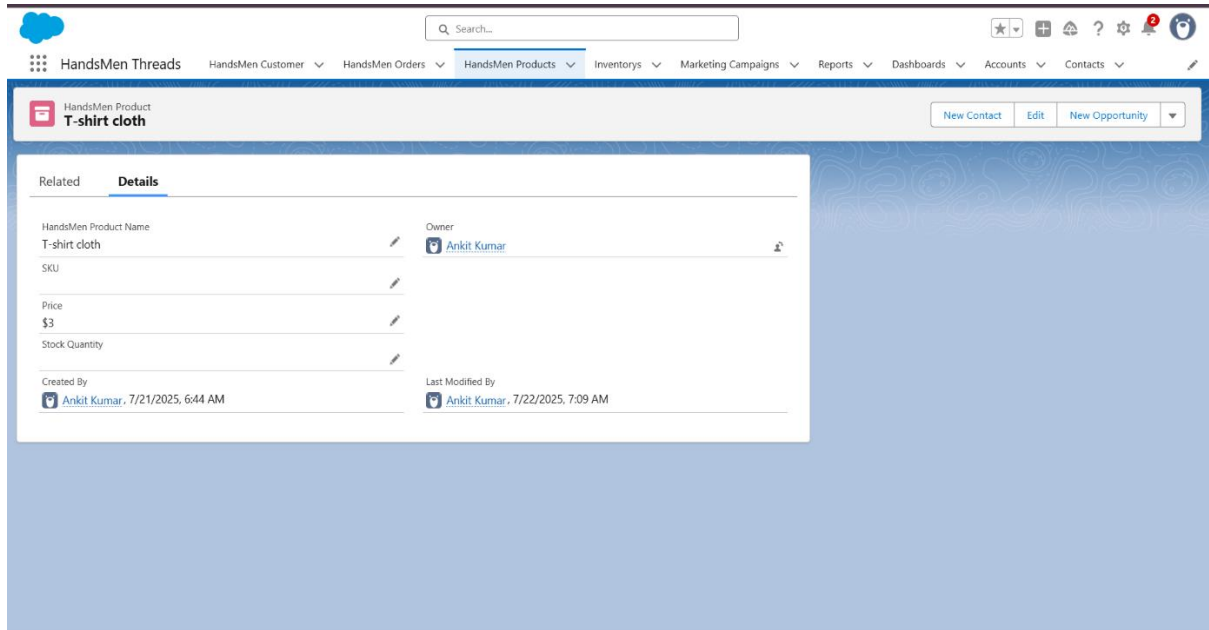


Fig : HandsMen Products

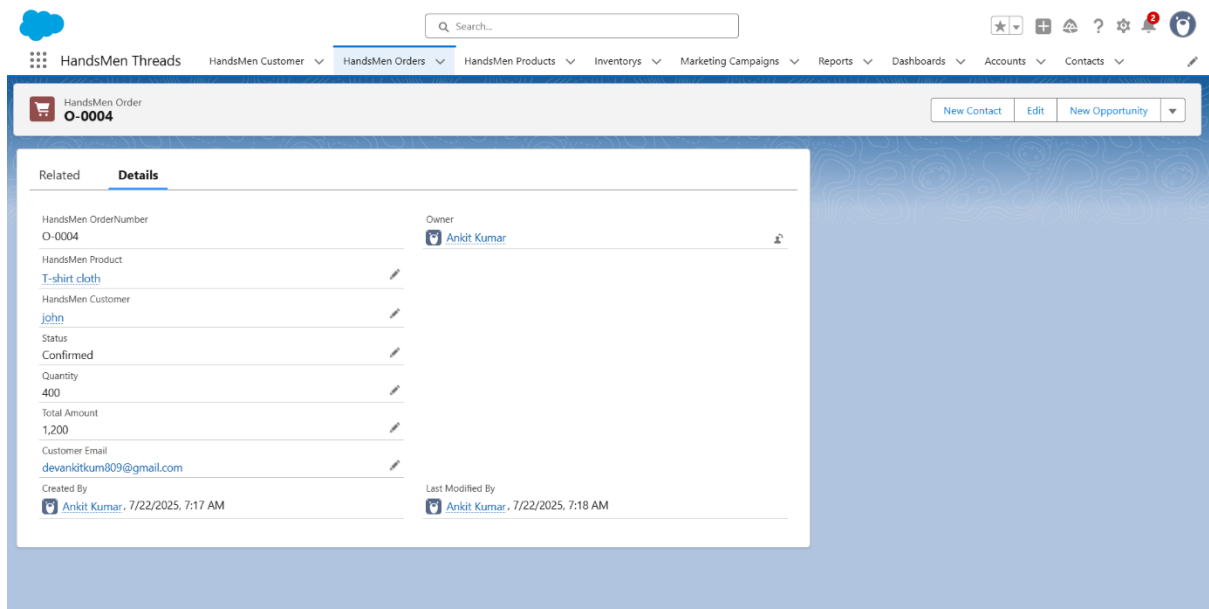


Fig : HandsMen Orders

HandsMen Threads

Inventory I-0001

Related Details

Inventory Number	I-0001
HandsMen Product	T-shirt cloth
Stock Quantity	600
Stock Status	Available
Warehouse	

Created By: Ankit Kumar, 7/21/2025, 6:44 AM

Last Modified By: Ankit Kumar, 7/22/2025, 7:18 AM

Fig : Inventorys

HandsMen Threads

HandsMen Customer john

Related Details

HandsMen Customer Name	John	Owner	Ankit Kumar
Email	devankitkum809@gmail.com		
Phone			
Loyalty Status	Brionze		
FirstName	john		
LastName	m		
FullName	john m		
Total Purchases	500		
Customer Email	devankitkum809@gmail.com		

Created By: Ankit Kumar, 7/21/2025, 6:43 AM

Last Modified By: OrgFarm EPIC, 7/22/2025, 7:02 AM

Fig : HandsMen Customer

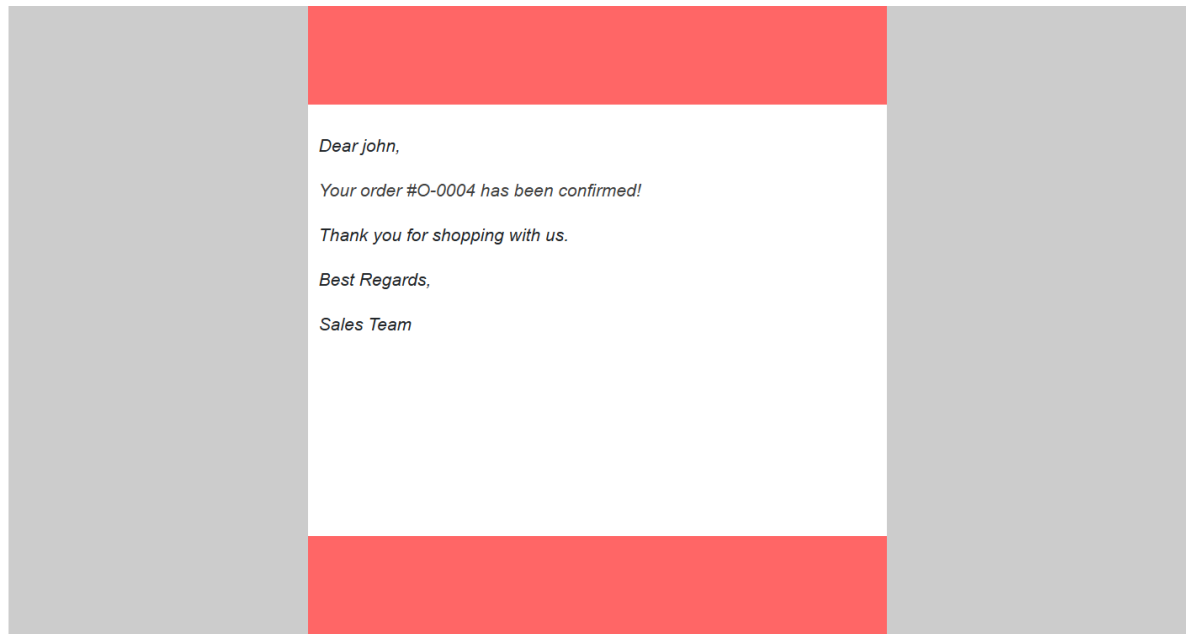


Fig : HandsMen Orders Confirmed

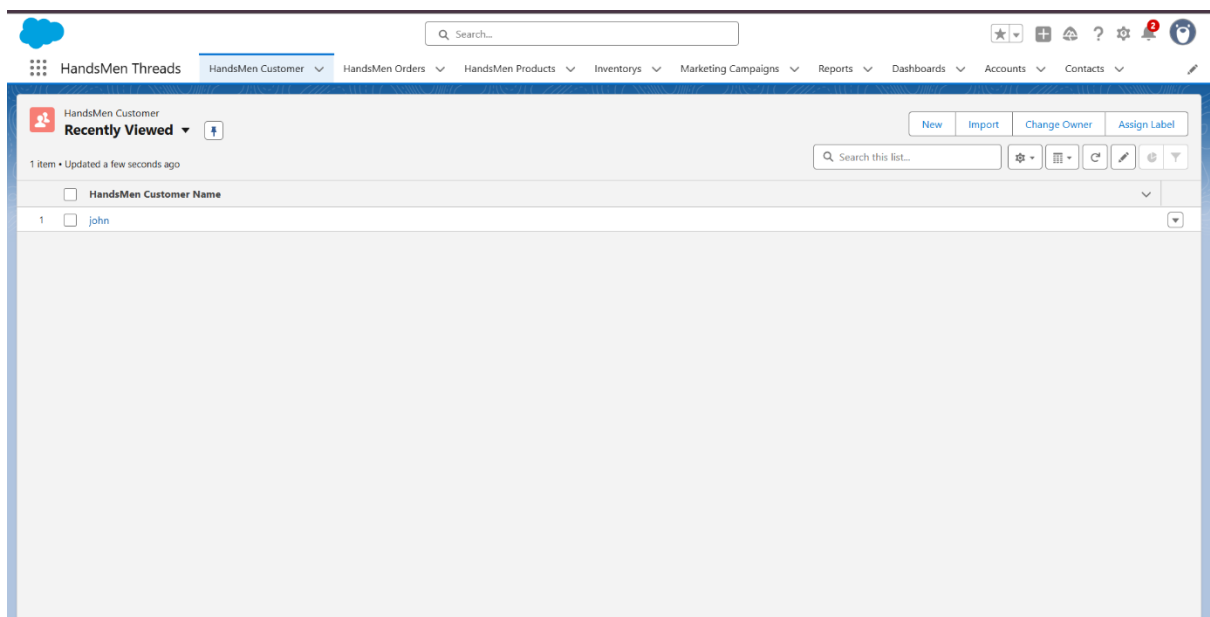


Fig : HandsMen Customer

REAL-WORLD SCENARIO WALKTHROUGH

- **Customer Elijah Mikaelson registers with valid Gmail ID.**
- **Products like shirts and jeans are added to the product catalog with stock.**
- **Elijah places an order for 2 shirts at ₹2500 each.**
- **Order Apex trigger calculates total ₹5000, inventory reduces stock by 2.**
- **Loyalty program updates Elijah's status to Silver based on cumulative purchases.**
- **Email notification sent automatically confirming order and loyalty status.**
- **Order Status Tracking and Updates**
- **After Elijah's order is confirmed, the system automatically updates the order status throughout the fulfillment cycle (processing, shipped, delivered). Customers can receive timely email or SMS notifications triggered by Flows, enhancing transparency and trust.**
- **Inventory Replenishment Workflow**
- **When inventory stock for popular products like shirts drops below a threshold (e.g., 5 units), an alert is sent automatically to the Inventory Manager. This triggers follow-up procurement processes to replenish stock before it runs out, reducing lost sales opportunities.**
- **Marketing Campaign Targeting**
- **Using customer data and loyalty status stored in Salesforce, the Marketing team launches personalized campaigns (e.g., seasonal offers for Silver and Gold members). Campaign responses are tracked back into the system, providing metrics on engagement and ROI.**
- **Customer Service and Support**
- **If Elijah has any post-purchase queries or returns, customer service representatives access his order and loyalty details through the unified**

BENEFITS AND CONCLUSION

The HandsMen Threads CRM solution successfully streamlines core processes: customer management, order handling, inventory tracking, and marketing automation. Automation reduces errors and manual workload, while validation rules ensure data integrity.

Role-based access improves security and collaboration. The system enhances customer experience through personalized communication and real-time updates.

FUTURE SCOPE

- 1. Customer Community Portal**
Enable customers to log in, see order status, and loyalty info.
- 2. Mobile Application**
Empower staff with a mobile app built on Salesforce Mobile SDK for on-the-go management.
- 3. Reports and Dashboards**
Develop analytics for sales trends and inventory status for management insights.
- 4. AI-Powered Recommendations (Einstein Analytics)**
Leverage Salesforce Einstein to personalize product suggestions and optimize marketing.