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

ABSTRACT

This project introduces a customized Salesforce CRM solution for HandsMen Threads, a premium brand in men's fashion and tailoring, with the goal of simplifying business operations, improving customer engagement, and maintaining accurate data across departments. The system uses a well structured data model with five key custom objects, specifically Customer, Order, Product, Inventory, and Marketing Campaign, and automates essential processes such as order confirmation, loyalty status updates, and low stock alerts through Record Triggered Flows, Scheduled Flows, Email Alerts, and Apex. To ensure clean and dependable data, the solution applies validation rules and a role-based security structure for the Sales team, the Inventory team, and the Marketing team, along with a scheduled Apex batch job that monitors and updates low inventory levels. Overall, this CRM implementation strengthens customer experience through personalized communication, increases operational efficiency with automation, and provides a strong and scalable foundation for the future growth of the business using the Salesforce Platform.

OBJECTIVE

The main objective of this project is to design and implement a customized Salesforce CRM solution for HandsMen Threads to optimize core business operations, ensure data accuracy, and elevate customer satisfaction. By establishing a centralized system for handling customers, orders, products, inventory, and marketing campaigns, the project seeks to

- **Automate key processes** such as order confirmations, loyalty status updates, and stock alerts.
- **Ensure accurate and consistent data** entry using validation rules.
- **Enable real-time visibility** of inventory and customer interactions.
- **Improve internal team coordination** through role-based access control.
- **Deliver personalized customer experiences** through targeted communication and loyalty programs.

TECHNOLOGY DESCRIPTION

Salesforce:

Salesforce is a cloud based Customer Relationship Management (CRM) platform that enables businesses to organize customer data, automate tasks, and improve their service, marketing, and sales operations. It offers point and click tools along with programmatic features such as Apex and Flows that allow users to create customized business solutions.

Custom Objects:

Objects in Salesforce work like tables in a database, and Custom Objects are created to store specific types of information.

Examples:

- Customer_c stores customer information
- Product_c stores product details
- Order_c stores order records

Tabs: Tabs allow users to view and work with object data in the Salesforce interface. **Example:** A tab for **Product_c** lets users access and manage product records.

Custom App: A Salesforce App is a collection of tabs arranged together to support a specific business function. It helps users access all related tools and objects in one organized workspace.

Profiles: Profiles determine what users can access and perform in Salesforce. They control permissions for objects, fields, and various system features. They ensure that each user can only work with the parts of the system that match their role.

Roles: Roles manage how data is viewed within the role hierarchy. They help define data visibility for sharing and reporting. This structure allows managers to see broader information while limiting access for lower level users.

Permission Sets: Permission Sets provide extra access or capabilities to users without needing to modify their profile. They make it easy to grant additional features to specific users when required.

Validation Rules: Validation Rules make sure that the data entered follows the required business standards. These rules help prevent incorrect or incomplete information from being saved in the system.

Examples:

- The email address must contain @gmail.com
- Stock value cannot be below zero

Email Templates: Email Templates are ready made formats used for sending messages to customers or system users. They help ensure that all outgoing emails are consistent and professionally written.
Example:
• An Order Confirmation template

Email Alerts: Email Alerts are actions inside Flows or Workflow Rules that send emails using a selected template. This feature helps keep users and customers informed without needing manual intervention.
Example: When a customer's loyalty level is updated, an email is automatically sent.

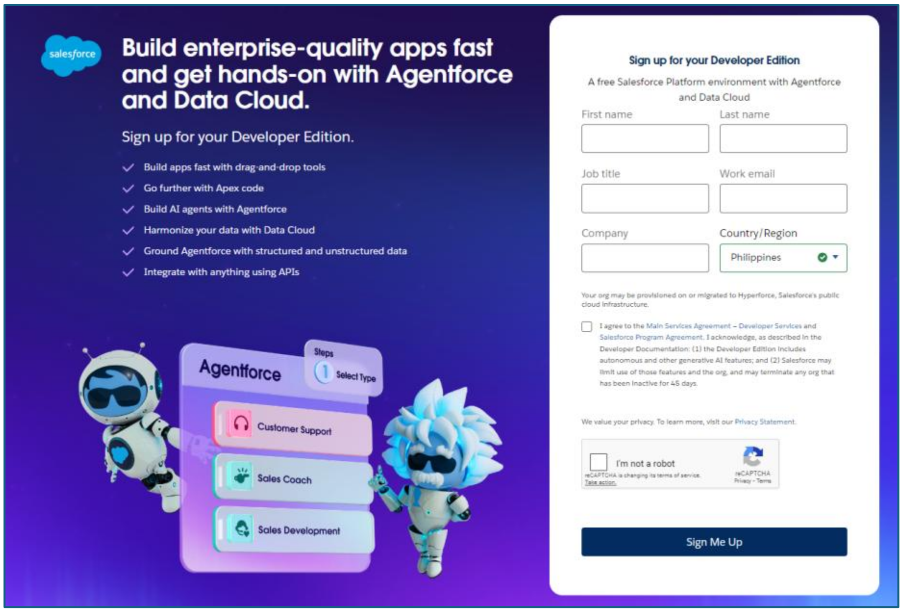
Flows: Flows allow the automation of business processes without writing code. They can create records, update data, or send notifications. Flows help streamline operations by reducing repetitive tasks.
Example:
• A Flow sends an email alert when a new order is created

Apex: Apex is the programming language used in Salesforce. It supports object oriented logic and is used to create custom functions. Apex is useful for handling complex logic that cannot be done with point and click tools.
Example Triggers:
• Automatically update the Total Amount field in orders
• Automatically decrease the inventory count

DETAILED EXECUTION OF PROJECT PHASES

1. Developer Org Setup

- A Salesforce Developer Org was created using https://developer.salesforce.com/signup.
- The account was verified, password set, and access was granted to the Salesforce Setup page

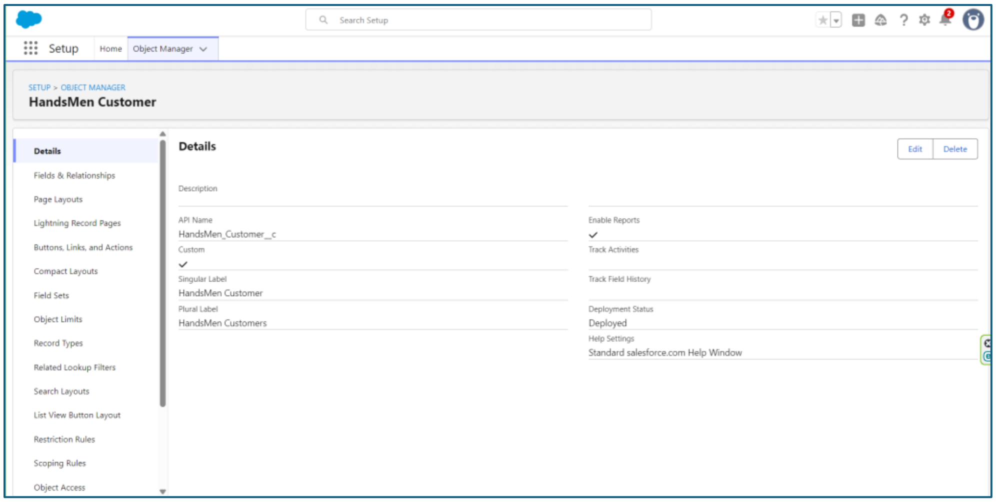


2. **Custom Object Creation**
   Five custom objects were developed to store essential business information:

   - **HandsMen Customer** keeps customer details such as email, contact number, and loyalty level.
   - **HandsMen Product** holds product information including SKU, pricing, and available stock.
   - **HandsMen Order** records customer orders along with quantity, status, and related details.
   - **Inventory** monitors stock levels and the specific warehouse where items are stored.
   - **Marketing Campaign** contains information about promotional activities and their schedules.

Steps followed:

- Went to Setup, opened Object Manager, and selected Create Custom Object
- Entered the object label and name, then enabled reporting and search options
- Saved the object and created a corresponding tab for each one



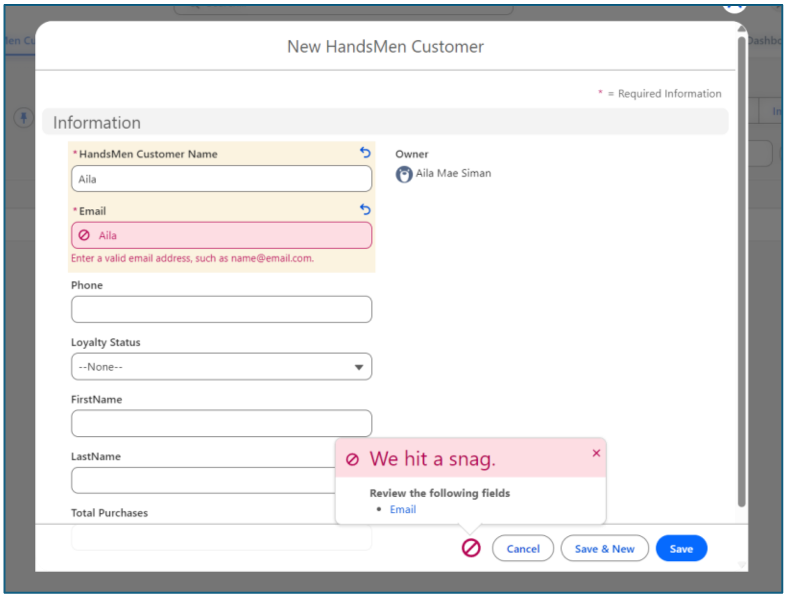
3. Creating the Lightning App

- A customized Lightning App called HandsMen Threads was set up.
- The app includes tabs such as HandsMen Customer, Order, Product, Inventory, Campaign, Reports, and others.
- The System Administrator profile was given access to the app.

4. Validation Rules

To ensure accurate data entry and enforce business logic, the following validation rules were applied:

- **Order Object:** Prevents saving if Total_Amount_c <=0.
  Error: "Please Enter Correct Amount"
- **Customer Object:** Validates email contains @gmail.com.
  Error: "Please fill Correct Gmail"



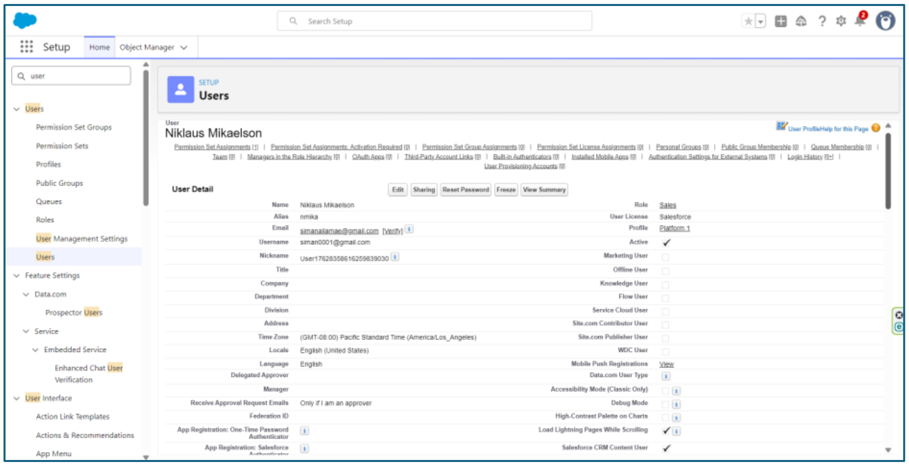
5. **User Role & Profile Setup**

- Cloned the Standard User profile to a new profile named Platform 1 and added access to necessary custom objects.
- Created roles for different departments:
  - Sales Manager, Inventory Manager, Marketing Team

6. **User Creation**

Users were created in Salesforce and assigned appropriate roles and profiles to reflect their responsibilities:

- Niklaus Mikaelson - Assigned the Sales role
- Kol Mikaelson - Assigned the Inventory role
- These role-based assignments help enforce proper data access and process control within the system.

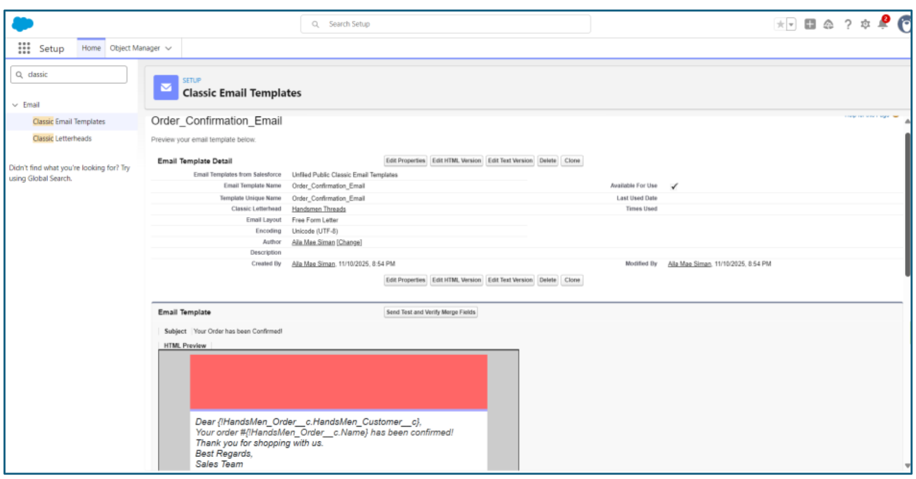


7. Email Template & Alerts.

Created three email templates:

- Order Confirmation - Sent on order status Confirmed
- Low Stock Alert - Sent when Inventory < 5 units
- Loyalty Program Email - Sent when loyalty status changes

Corresponding Email Alerts were created using these templates and linked to automation flows.

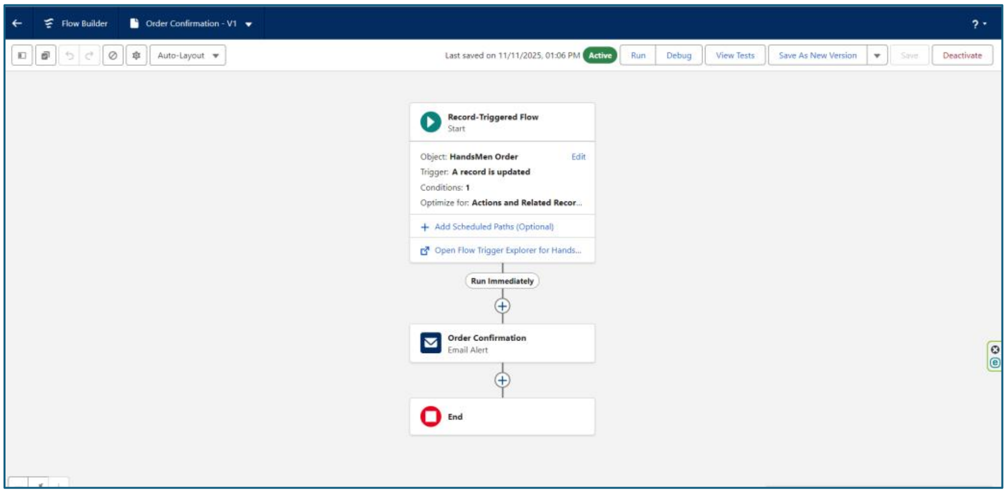


8. Flow Implementations.

a. Order Confirmation Flow

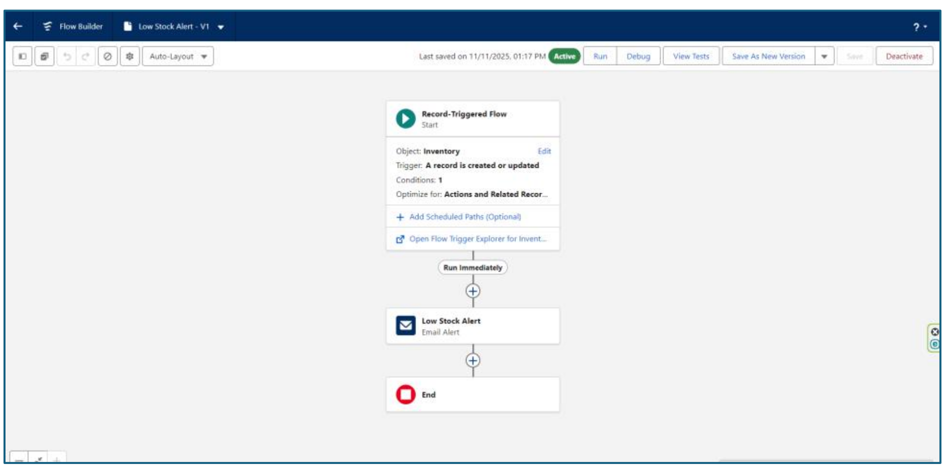
- Triggered when an order is updated to Confirmed.

- Sends an Order Confirmation email to the related customer.



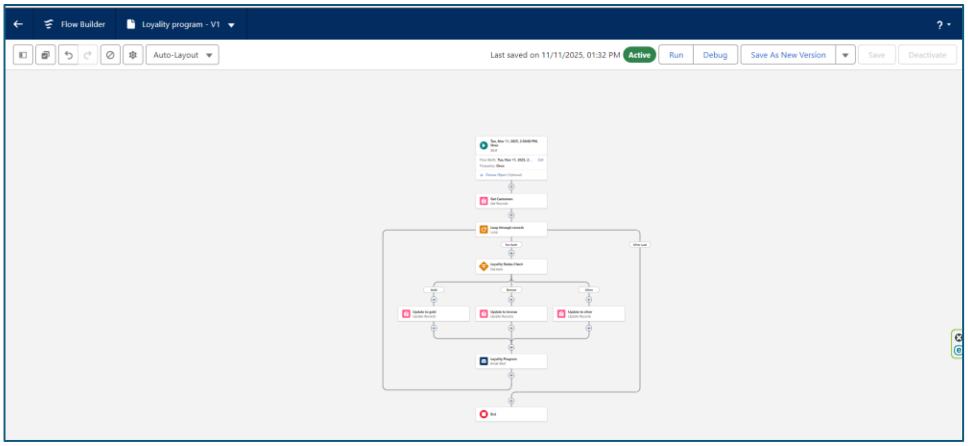
b. Stock Alert Flow

- Triggered when Inventory stock drops below 5.
- Sends Low Stock email to Inventory Manager.



c. Scheduled Flow: Loyalty Update

- Runs daily at midnight.
- Loops through customers and updates their Loyalty Status based on total purchases.



7. **Apex Triggers**
   - **Order Total Trigger:** Auto-calculates Total Amount based on quantity and unit price.
   - **Stock Deduction Trigger:** Reduces stock when an order is placed.
   - **Loyalty Status Trigger:** Updates Loyalty Status based on total purchases.

<u>PROJECT EXPLANATION WITH REAL-WORLD EXAMPLE</u>

Let's walk through it like a real customer interaction.

1. **Customer Registration**
   - A customer, Elijah Mikaelson, visits the store or website.
   - In Salesforce: A record is created in the Customer object with his name, phone, email, etc.
   - Validation Rule: Ensures the email is valid (e.g., must contain @gmail.com).

2. **Product Setup**
   - The admin adds products like Shirts, Jeans, etc., into the Product_c object.
   - Each product has a price and other details.
   - Inventory is also created to manage stock for these products.

3. **Order Placement**

- Elijah decides to buy 2 shirts (each ₹500). An order is placed.
- In Salesforce: A new Order record is created.
- Apex Trigger: Automatically calculates Total_Amount_c=2 × 500 = ₹1000.

4. **Inventory Update**

   As soon as the order is placed:

   - Apex Trigger on Inventory: Reduces shirt stock by 2.
   - Validation Rule: Ensures stock never goes below 0.

5. **Loyalty Program**

   - Elijah now has a total purchase of ₹1000.
   - A trigger on Customer checks his total purchases.

     Based on the value:

     < ₹500 → Bronze

     ₹500 - ₹1000 → Silver

     ₹1000 → Gold
   - So, Elijah becomes a Silver member.

6. **Email Notifications**

   - When a new order is placed or loyalty status is updated:
   - Flow + Email Alert is triggered.
   - Elijah gets an email:

     "Thanks for your purchase! Your loyalty status is now Silver."

7. **Users and Roles**

Salesforce users like store staff are created:

- **Niklaus Mikaelson** - Sales Role (Platform 1 Profile)
- **Kol Mikaelson** - Inventory Role (Platform 1 Profile)

SCREENSHOTS

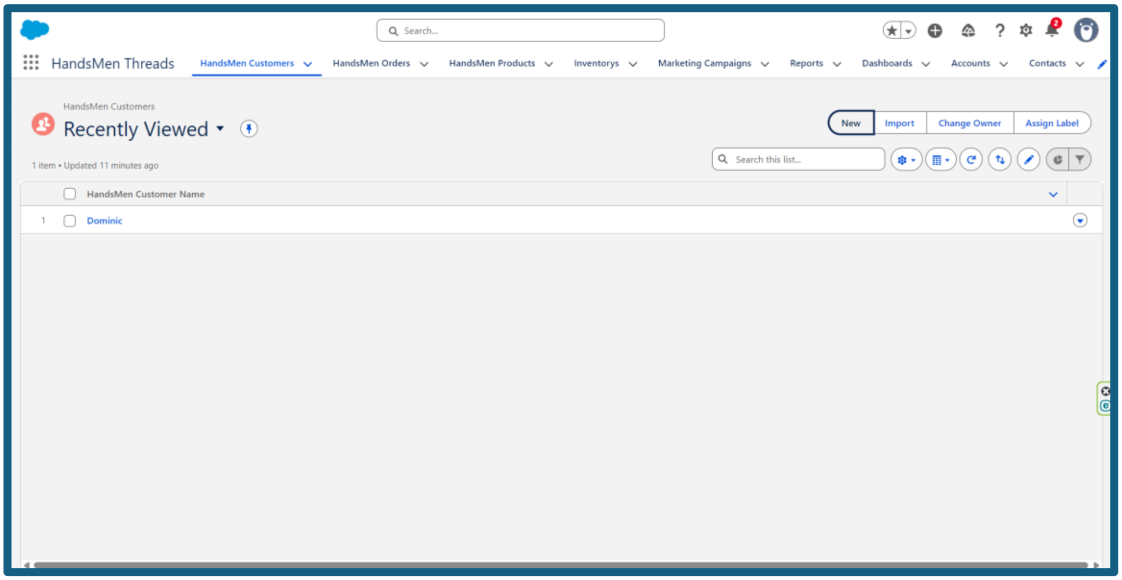


Fig: Custom App for HandsMen Threads

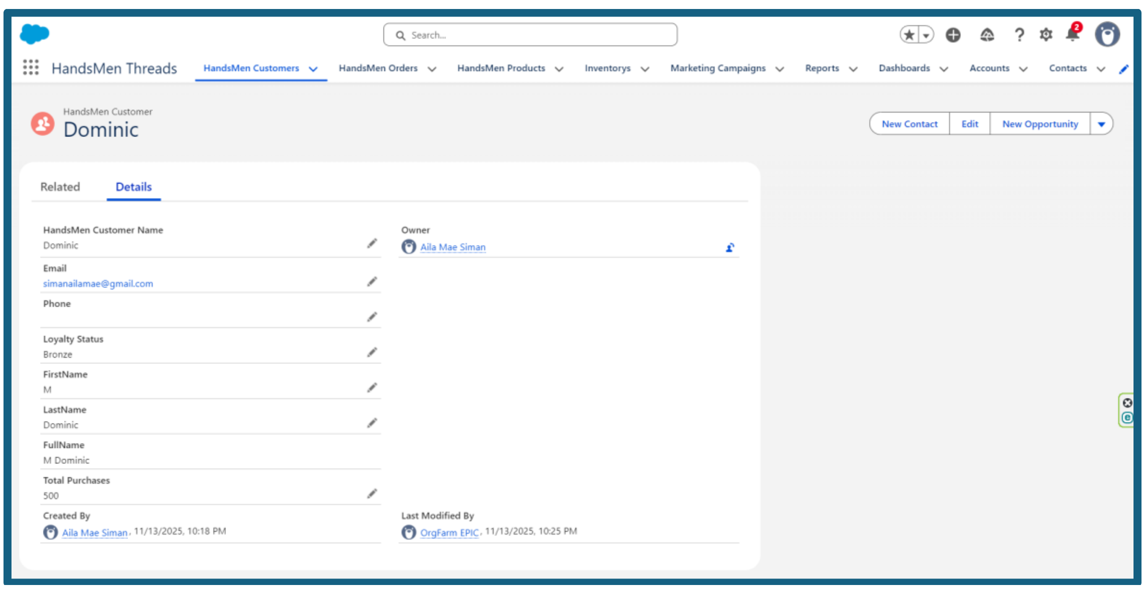


Fig: Customer Creation in HandsMen Threads

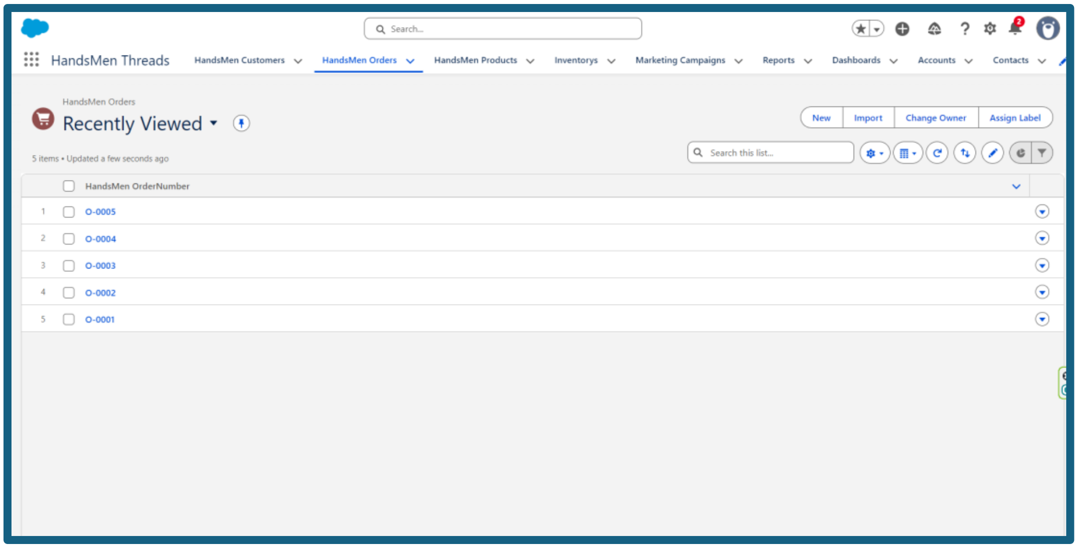


Fig: Custom Order for HandsMen Threads

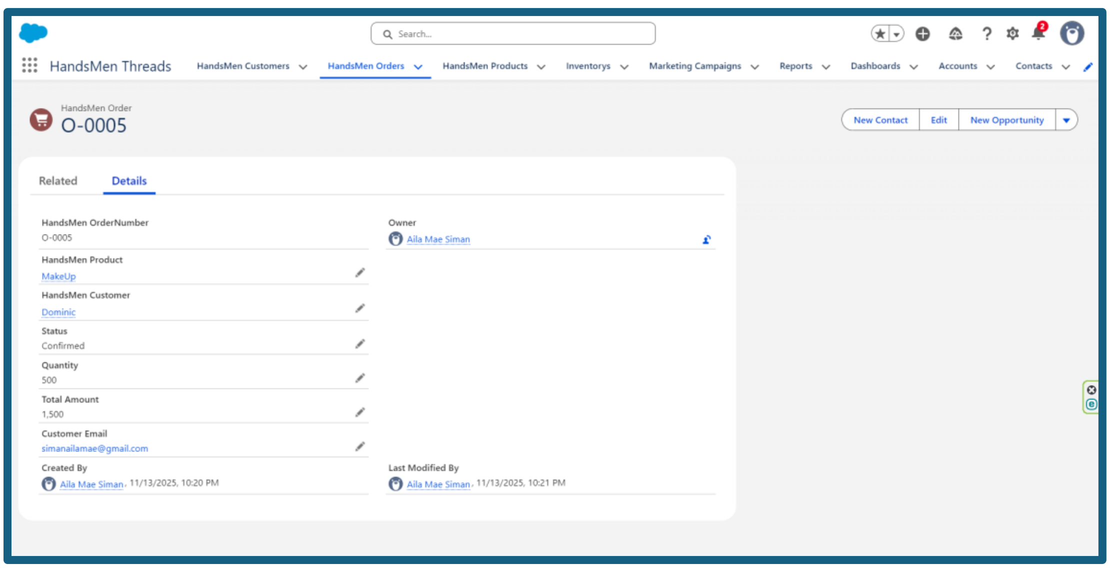


Fig: Order Confirmation in HandsMen Threads

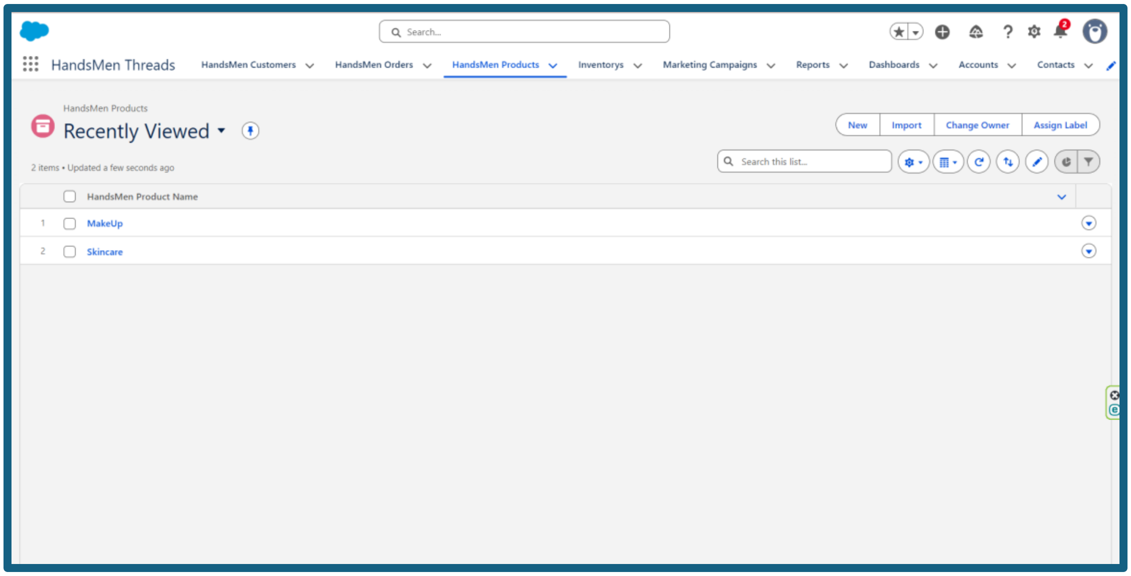


Fig: Custom Products for HandsMen Threads

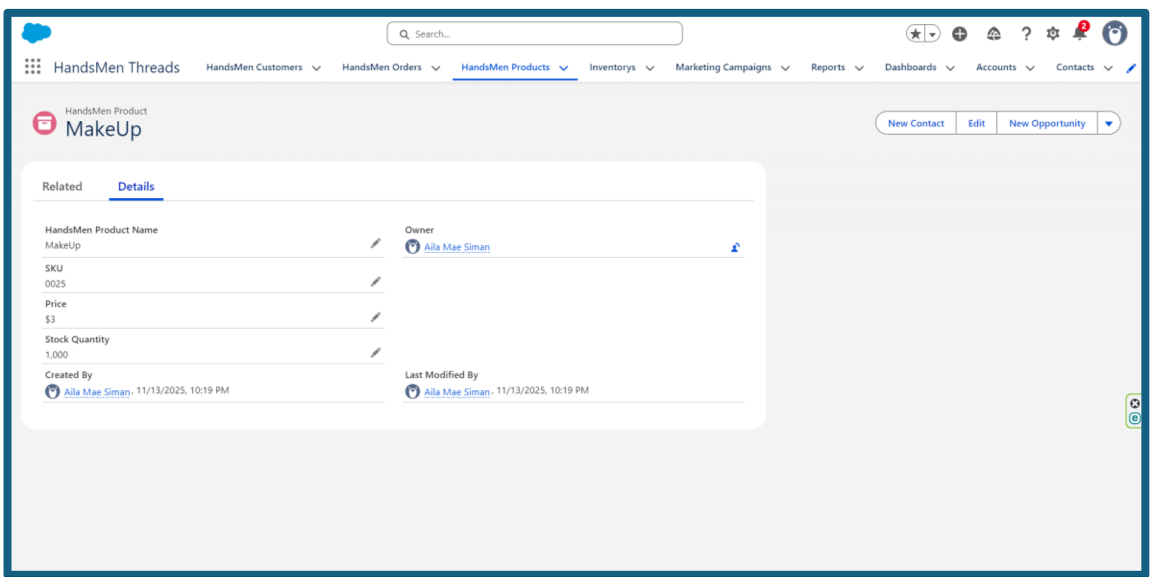


Fig: Products in HandsMen Threads

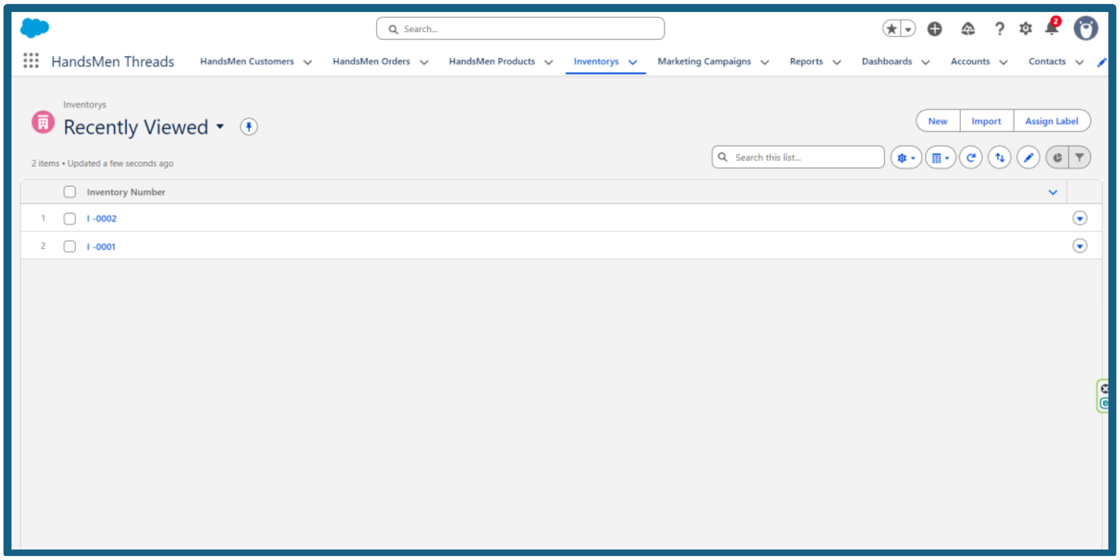


Fig: Custom Inventory for HandsMen Threads

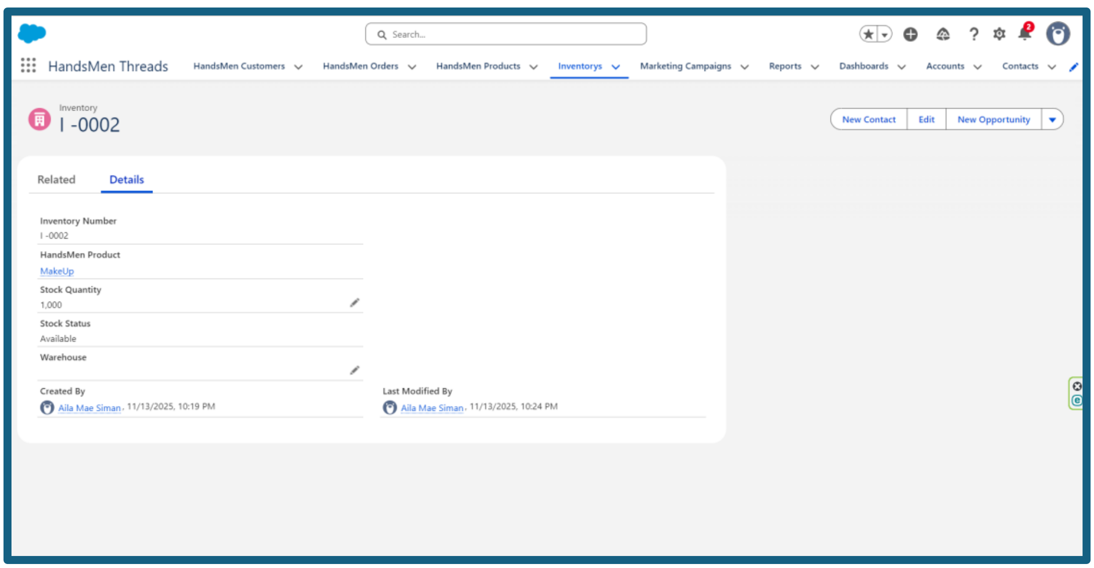


Fig: Inventory in HandsMen Threads

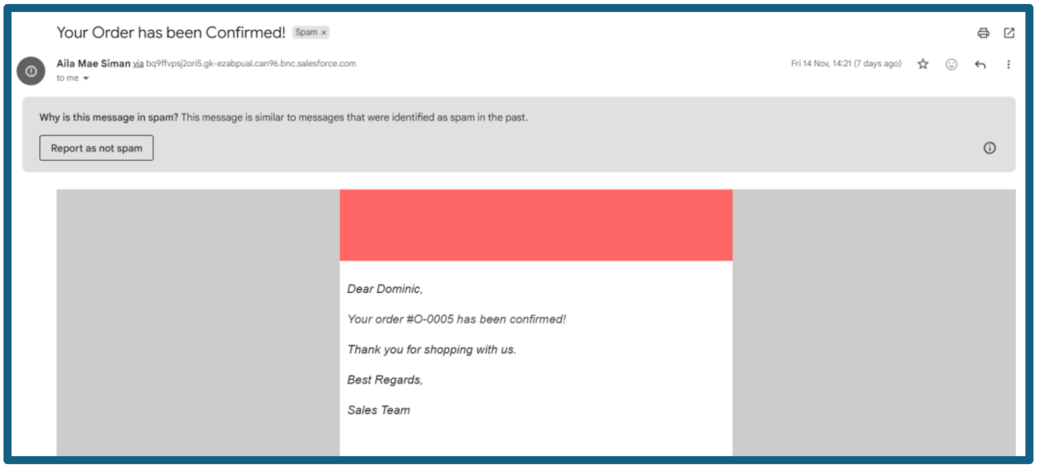


Fig: Order Confirmation Email

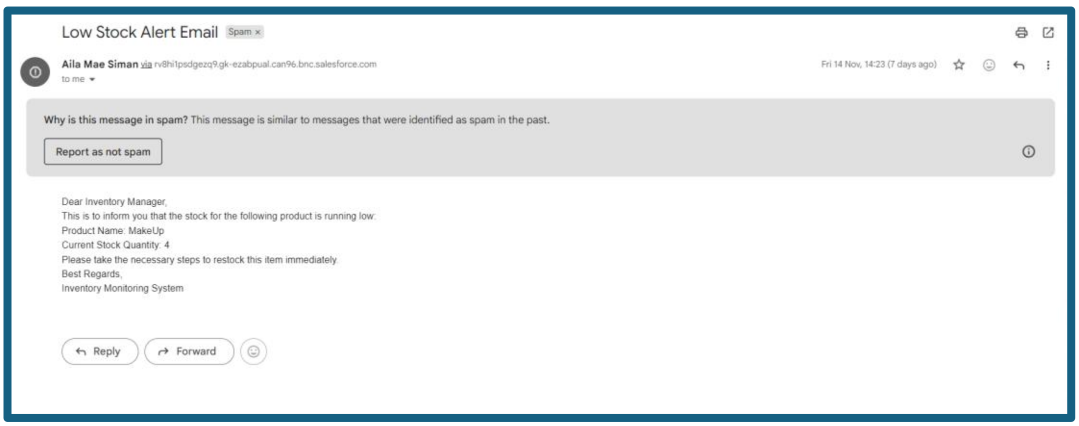


Fig: Low Stock Alert Email

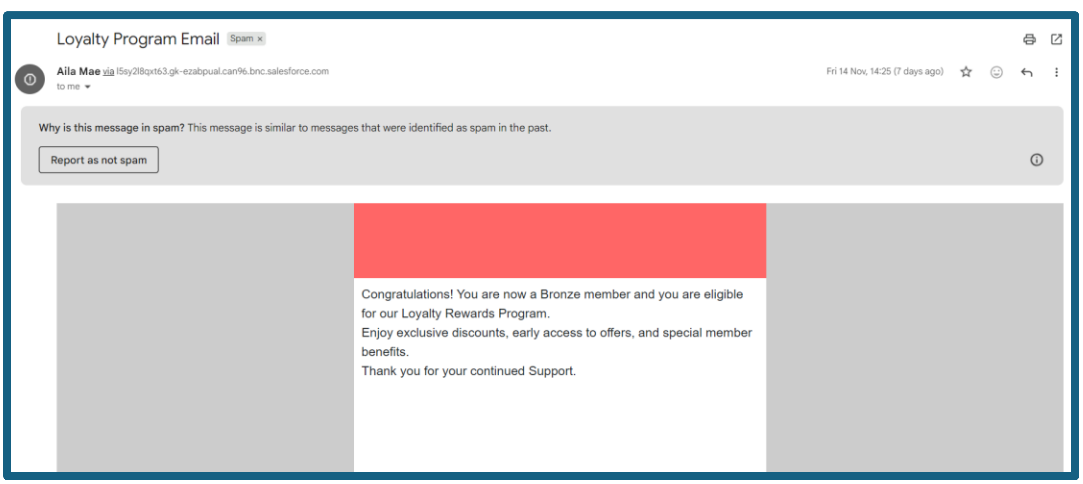


Fig: Loyalty Program Email

CONCLUSION

The HandsMen Threads CRM system developed in Salesforce effectively improves major business operations, including customer management, product organization, order handling, inventory monitoring, and loyalty program automation. By using Salesforce features such as Custom Objects, Flows, Validation Rules, Email Alerts, and Apex, the system delivers accurate data, real-time updates, and an improved customer experience. With automation and well-defined user roles, the platform reduces manual mistakes, increases efficiency, and offers stronger visibility into sales performance and stock levels.

Overall, the system provides a reliable and scalable foundation that can support future business growth. It also equips the company with better decision-making tools, allowing teams to respond quickly to customer needs and market changes. As a result, HandsMen Threads is now able to maintain smoother operations and deliver a more consistent and professional service to its customers.

Future Scope:

1. **Customer Portal Integration**
   - Build a Customer Community Portal where customers can log in, view orders, and track loyalty status.
2. **Mobile App using Salesforce Mobile SDK**
   - Enable store staff to manage inventory and orders on the go using a mobile interface.
3. **Reports & Dashboards**
   - Create detailed sales and inventory dashboards for management to monitor trends and performance in real-time.
4. **Al-Powered Recommendations (Einstein)**
   - Use Salesforce Einstein to provide personalized product suggestions based on past purchases.
5. **WhatsApp/SMS Integration**
   - Notify customers via WhatsApp or SMS about order confirmations and loyalty updates.