

HandsMen Threads: Elevating the Art of

Sophistication in Men's Fashion

ABSTRACT

This project presents the implementation of a customized Salesforce CRM solution for HandsMen Threads, a premium men's fashion and tailoring brand. The primary objective of this project was to streamline internal business operations, enhance customer engagement through intelligent automation, and uphold data integrity across departments by leveraging the robust capabilities of the Salesforce platform.

The solution architecture focused on building a scalable and flexible data model consisting of five custom objects: Customer, Order, Product, Inventory, and Marketing Campaign. These objects were interconnected to ensure seamless data flow and accurate reporting across various departments. Business processes were automated using a combination of Record-Triggered Flows, Scheduled Flows, Email Alerts, and Apex Classes, effectively managing workflows related to order confirmations, loyalty program tracking, inventory level monitoring, and promotional outreach.

To maintain data quality and governance, comprehensive validation rules were implemented across custom objects, and a role-based security model was introduced to enforce access control across the Sales, Inventory, and Marketing teams. Additionally, an Apex-scheduled batch job was developed to automatically monitor and update low-stock quantities, reducing manual intervention and ensuring stock accuracy in real time.

This end-to-end Salesforce CRM implementation has significantly improved operational efficiency by reducing human errors, increasing responsiveness to customer interactions, and providing meaningful insights through automation. The solution not only delivers a personalized customer experience but also establishes a solid foundation for future digital growth and scalability for HandsMen Threads within the Salesforce ecosystem.

OBJECTIVE

The main objective of this project is to develop and implement a customized Salesforce CRM solution for HandsMen Threads to streamline core business operations, maintain data integrity, and enhance customer satisfaction.

By building a centralized system to manage customers, orders, products, inventory, and marketing campaigns, the project aims 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.

TECHNOLOGY DESCRIPTION

Salesforce:-

Salesforce is a cloud-based Customer Relationship Management (CRM) platform that helps businesses manage customer data, automate processes, and improve service, marketing, and sales operations. It provides point-and-click tools as well as programmatic capabilities (like Apex and Flows) to build custom business solutions.

Custom Objects:-

Objects in Salesforce are like tables in a database. Custom Objects are created to store specific data.

Example:

- Customer__c – Stores customer info
- Product__c – Stores product details
- Order__c – Stores orders

Tabs:-

Tabs are used to display object data in the Salesforce UI.

Example: A tab for Product__c allows users to easily view and manage products.

Custom App:-

An App in Salesforce is a collection of tabs grouped together for a specific business purpose.

Profiles:-

Profiles define what a user can see, do, and edit in Salesforce. It controls object permissions, field access, and more.

Roles:-

Roles control the data visibility in Salesforce's role hierarchy. It's used for sharing settings and reporting.

Permission Sets:-

Permission Sets grant additional permissions to users without changing their profile.

Validation Rules:-

Validation Rules ensure data entered meets business criteria.

Example:

- Email must contain @gmail.com
- Stock cannot be negative

Email Templates:-

Predefined formats for sending emails to customers or users.

Example:

- "Order Confirmation" template

Email Alerts:-

Email Alerts are actions in Flows or Workflow Rules that send emails using predefined templates.

Example: When a loyalty level changes, an email is sent to the customer.

Flows:-

Flows automate business logic without code. They can create, update, or send notifications.

Example:

- Flow triggers email alerts on new order

Apex:-

Apex is Salesforce's object-oriented programming language. It allows developers to write custom logic.

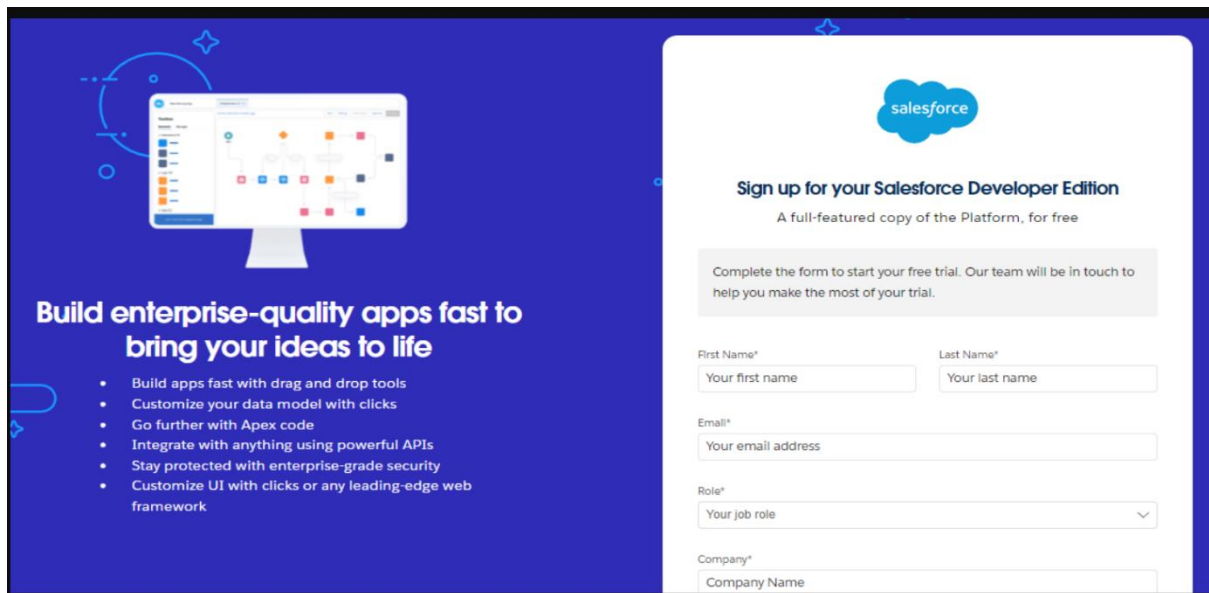
Example Triggers:

- Update Total_Amount__c in orders
- Reduce inventory stock

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.



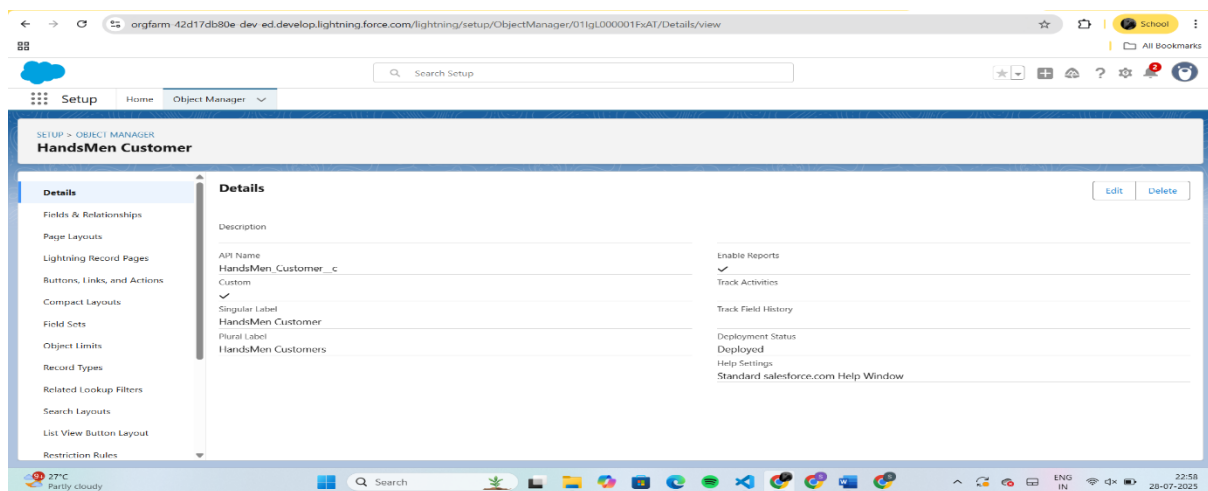
2. Custom Object Creation

Five custom objects were created to store business-critical data:

- **HandsMen Customer** – Stores customer info like email, phone, loyalty status.
- **HandsMen Product** – Stores product catalog details like SKU, price, and stock.
- **HandsMen Order** – Stores orders placed by customers, including quantity and status.
- **Inventory** – Tracks stock quantity and warehouse location.
- **Marketing Campaign** – Stores promotional campaigns and scheduling.

Steps followed:

- Navigated to Setup → Object Manager → Create → Custom Object
- Provided label, name, and enabled reports/search
- Saved and created Tabs for each object



3. Creating the Lightning App

- A custom Lightning App named HandsMen Threads was created.
- Included tabs: HandsMen Customer, Order, Product, Inventory, Campaign, Reports, etc.
- Assigned to the System Administrator profile.

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"

New HandsMen Customer

* = Required Information

Information

* HandsMen Customer Name  Owner  Shaik Aliya

janu

Email

Phone

Loyalty Status

--None--

FirstName

LastName

Total Purchases

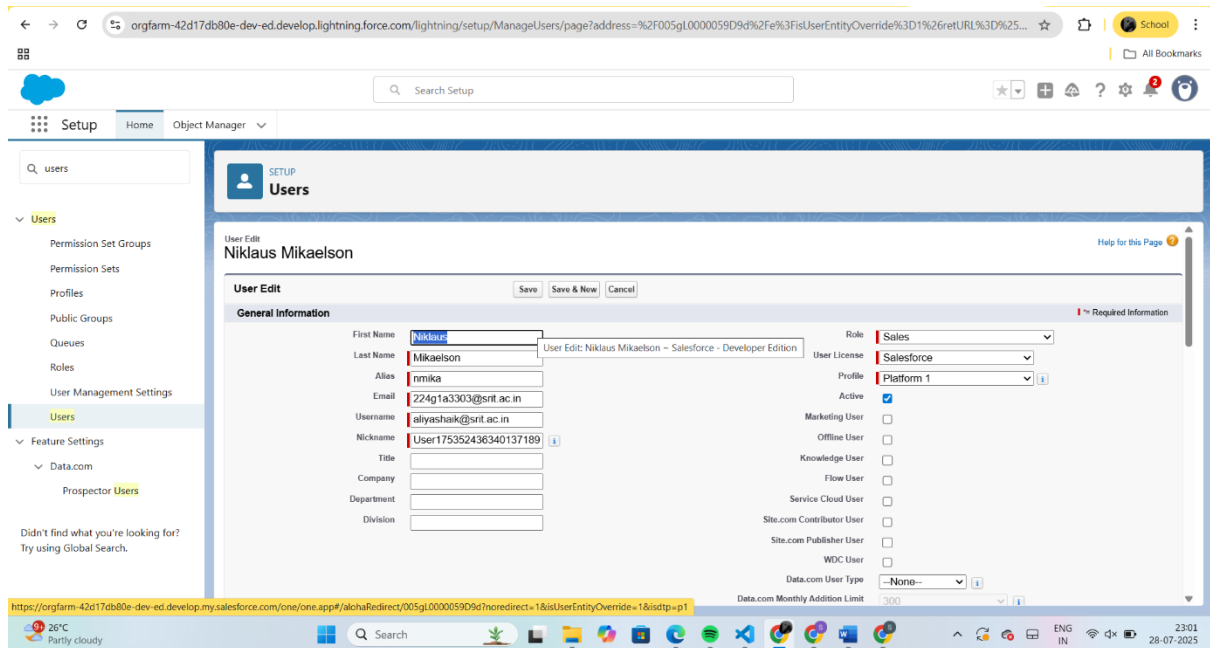
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5. User Role & Profile Setup

- 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

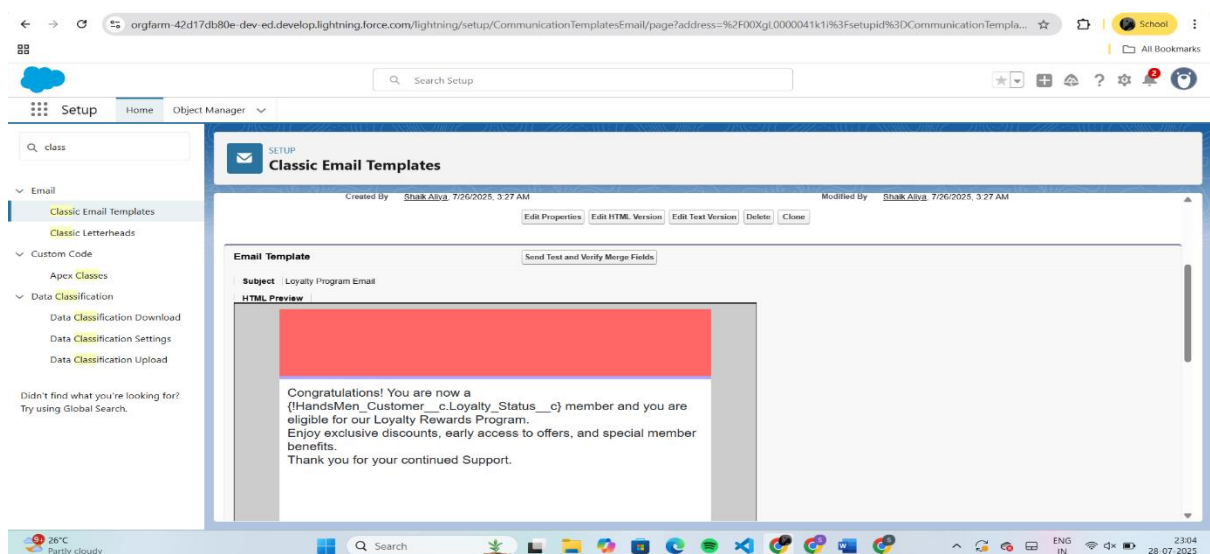
- Users were created in Salesforce and assigned appropriate roles and profiles to reflect their responsibilities:
- **Niklaus Mikaelson** – Assigned the **Sales** role
- **Kol Mikaelson** – Assigned the **Inventory** role
- These role-based assignments help enforce proper data access and process control within the system.



7. Email Template & Alerts

Created three email templates:

- **Order Confirmation** – Sent on order status = Confirmed

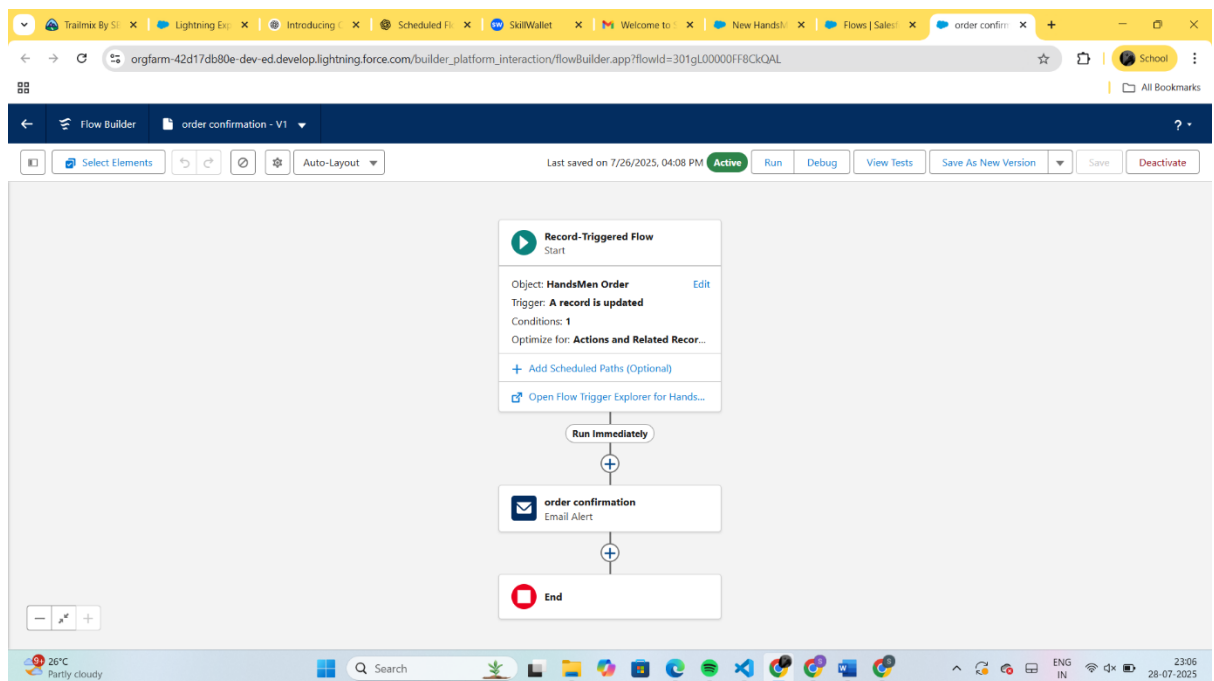


- **Low Stock Alert** – Sent when Inventory < 5 units
- **Loyalty Program Email** – Sent when loyalty status changes
- Corresponding Email Alerts were created using these templates and linked to automation flows.

8. Flow Implementations

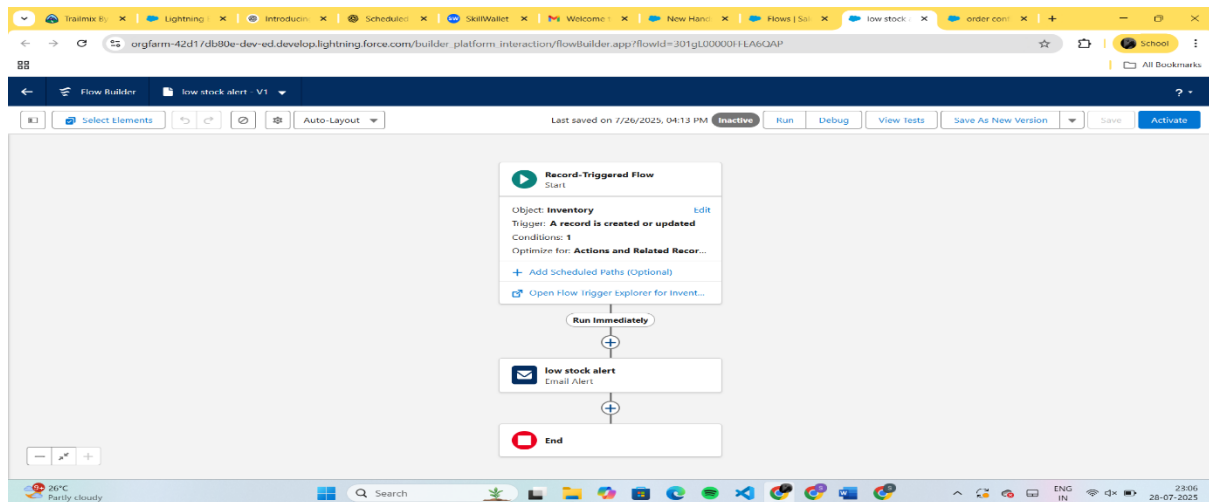
a. Order Confirmation Flow

- Triggered when an order is updated to Confirmed.
- Sends an Order Confirmation email to the related customer.



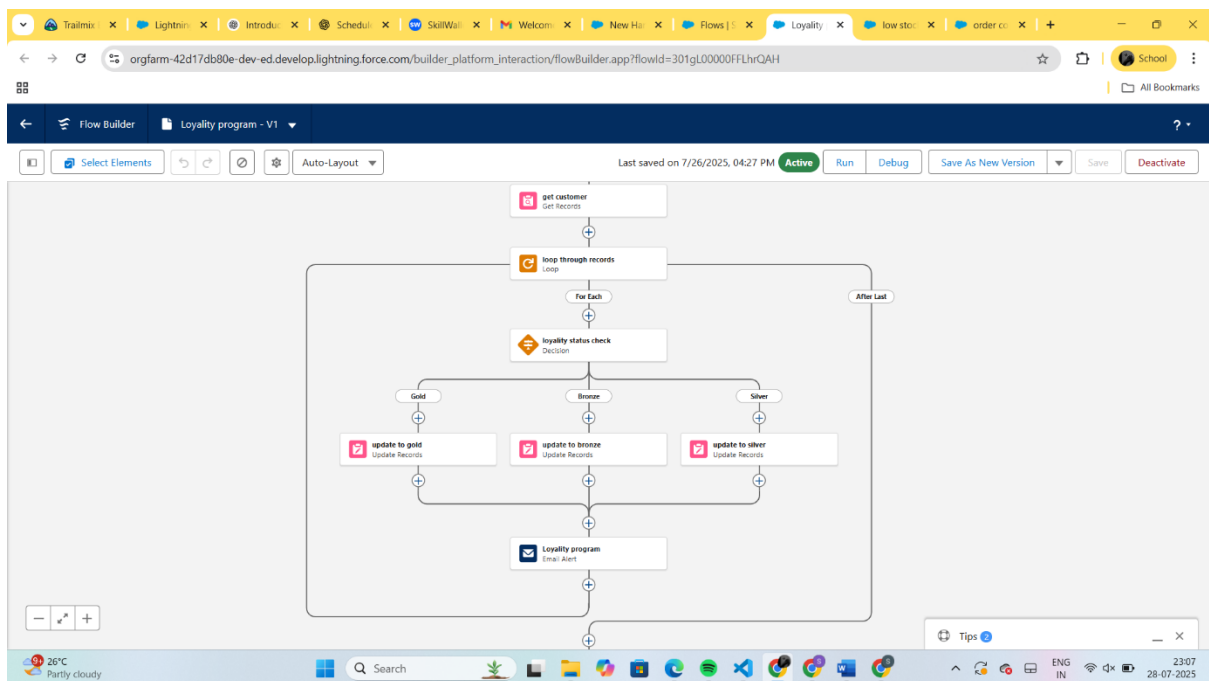
b. Stock Alert Flow

- 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.

PROJECT EXPLANATION WITH REAL-WORLD EXAMPLE

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 $\text{Total_Amount_c} = 2 \times 500 = 1000$.

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:**
- $< ₹500 \rightarrow$ Bronze
- ₹500–₹1000 \rightarrow Silver
- ₹1000 \rightarrow 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."

CONCLUSION

The HandsMen Threads CRM system built on Salesforce successfully streamlines key business processes like customer management, product cataloging, order processing, inventory tracking, and loyalty program automation. By leveraging Salesforce tools like Custom Objects, Flows, Validation Rules, Email Alerts, and Apex, the system ensures accurate data entry, real-time updates, and enhanced customer experience. Through automation and well-structured user roles, the platform minimizes manual errors, speeds up operations, and provides better insights into sales and stock.

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. AI-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.