

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

ABSTRACT

This project highlights the development and deployment of a custom Salesforce CRM solution for *HandsMen Threads*, a premium men's fashion and tailoring brand.

The primary focus is to streamline operational workflows, boost customer engagement, and ensure data integrity across multiple teams.

The solution is designed with a robust data model using five primary custom objects:

1. Customer
2. Order
3. Product
4. Inventory
5. Marketing Campaign

Key processes are automated through Record-Triggered Flows, Scheduled Flows, Email Alerts, and Apex Triggers, covering order confirmations, loyalty status management, and proactive stock shortage alerts.

To maintain clean and reliable data, validation rules were implemented, while role-based security was configured for Sales, Inventory, and Marketing teams. Additionally, a scheduled Apex batch job was created to monitor and update low-stock quantities automatically.

Overall, this end-to-end Salesforce CRM implementation enhances customer experience via personalized communication, improves operational efficiency with automation, and creates a scalable foundation for future business growth.

OBJECTIVE

The main goal of this initiative is to develop a customized Salesforce CRM system for HandsMen Threads that will:

- Streamline key operational processes.
- Maintain data accuracy and consistency across all departments.
- Enhance customer satisfaction with personalization and improved interactions.

The centralized solution handles customers, orders, products, inventory, and marketing campaigns, aiming to:

- Automate core workflows (e.g., order confirmations, loyalty tier updates, stock alerts).
- Use validation rules to enforce clean and consistent data entry.
- Offer real-time insights into inventory and customer interactions.
- Enable role-based collaboration across departments.
- Deliver targeted customer experiences via loyalty programs and personalized communication.

TECHNOLOGY DESCRIPTION

Salesforce Overview

Salesforce is a cloud-based Customer Relationship Management (CRM) platform designed to manage customer relationships, automate workflows, and improve sales, service, and marketing functions.

It offers both:

- Declarative tools like Flows and validation rules (no-code).
- Programmatic options such as Apex and triggers for complex logic.

Key Features Used

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

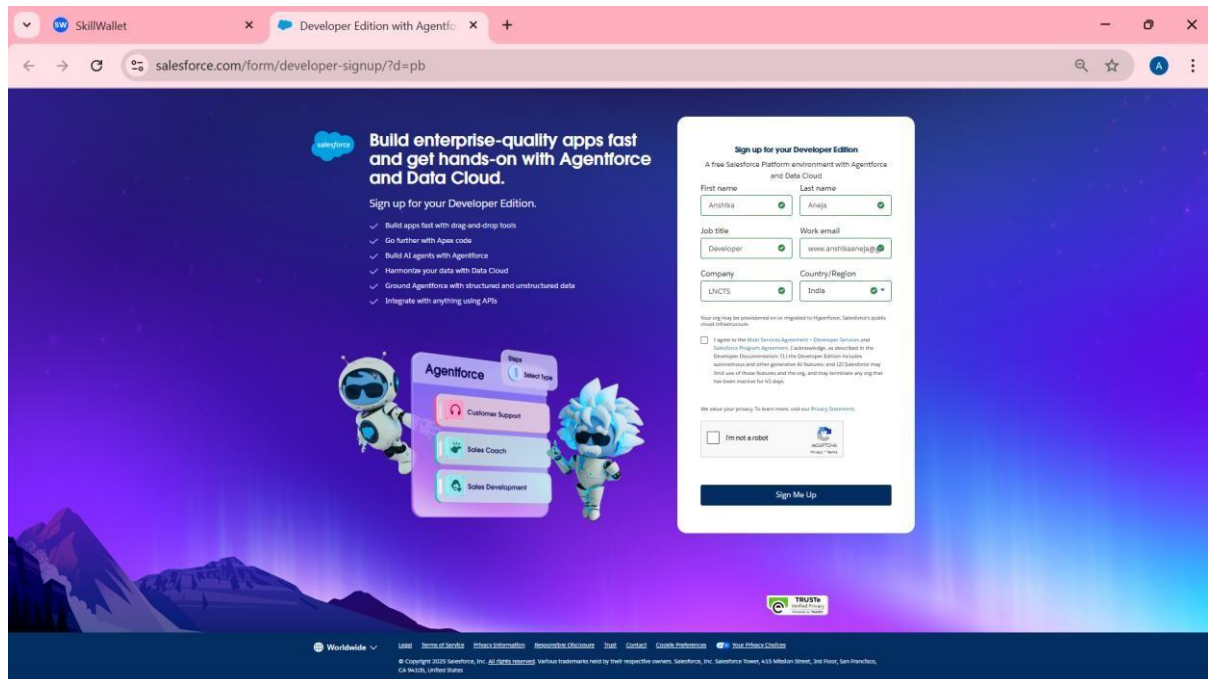
Example:

- Customer__c – Stores customer info
 - Product__c – Stores product details
 - Order__c – Stores orders
2. **Tabs**: Each custom object is displayed in the Salesforce UI for easy access
 Example: A tab for Product__c allows users to easily view and manage Products.
 3. **Custom Lightning App**: Groups together related tabs into a single interface for HandsMen Threads.
 4. **Profiles**: Profiles define what a user can see, do, and edit in Salesforce. It controls object permissions, field access, and more.
 5. **Roles**: Control data visibility and sharing hierarchy, improving collaboration.
 6. **Permission Sets**: Permission Sets grant additional permissions to users without changing their profile.
 7. **Validation Rules**: Ensure accurate entries, for example:
 - Customer email must include “@gmail.com”.
 - Stock values must never be negative.
 8. **Email Templates**: Predefined formats for sending emails to customers or users.
 Example:
 "Order Confirmation" template
 9. **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.
 10. **Flows**: Automate processes without custom code. Example: Sending a confirmation email whenever an order status changes to “Confirmed.”
 11. **Apex**: Apex is Salesforce’s object-oriented programming language. It allows developers to write custom logic
 Example:
 - OrderTriggerHandler
 - OrderTrigger

IMPLEMENTATION DETAILS

Step 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.



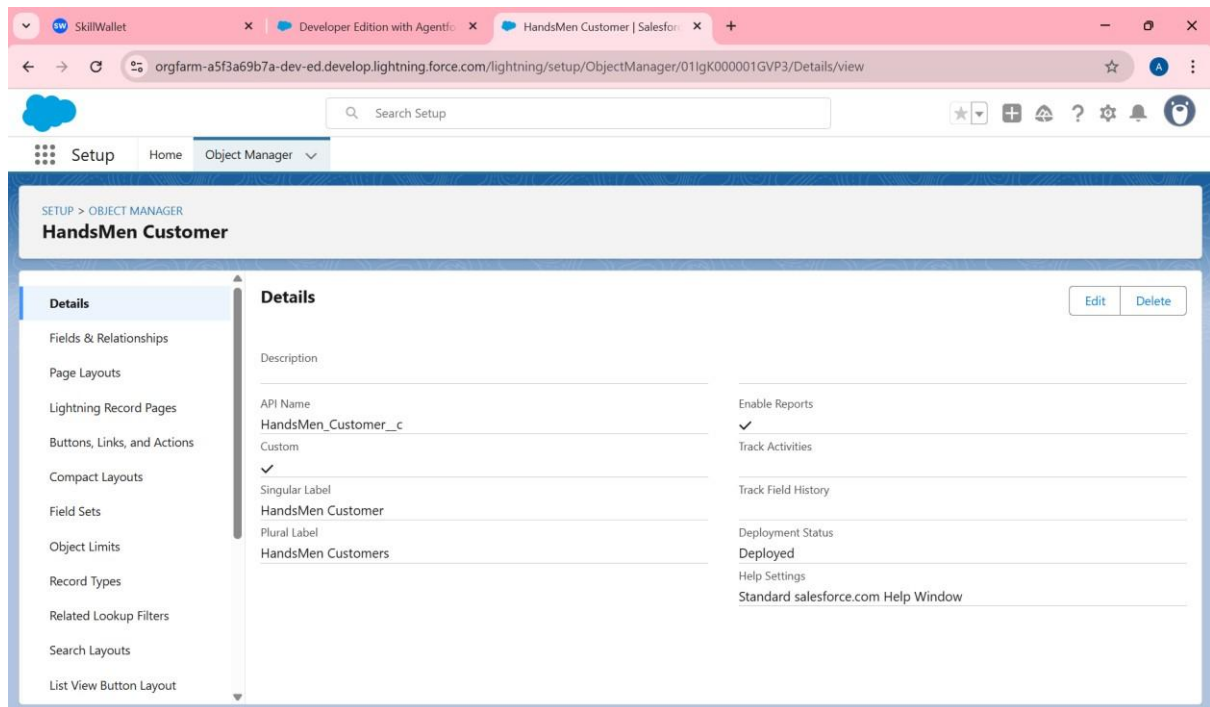
Step 2 - Custom Object Creation

Five business-critical objects were created:

- **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



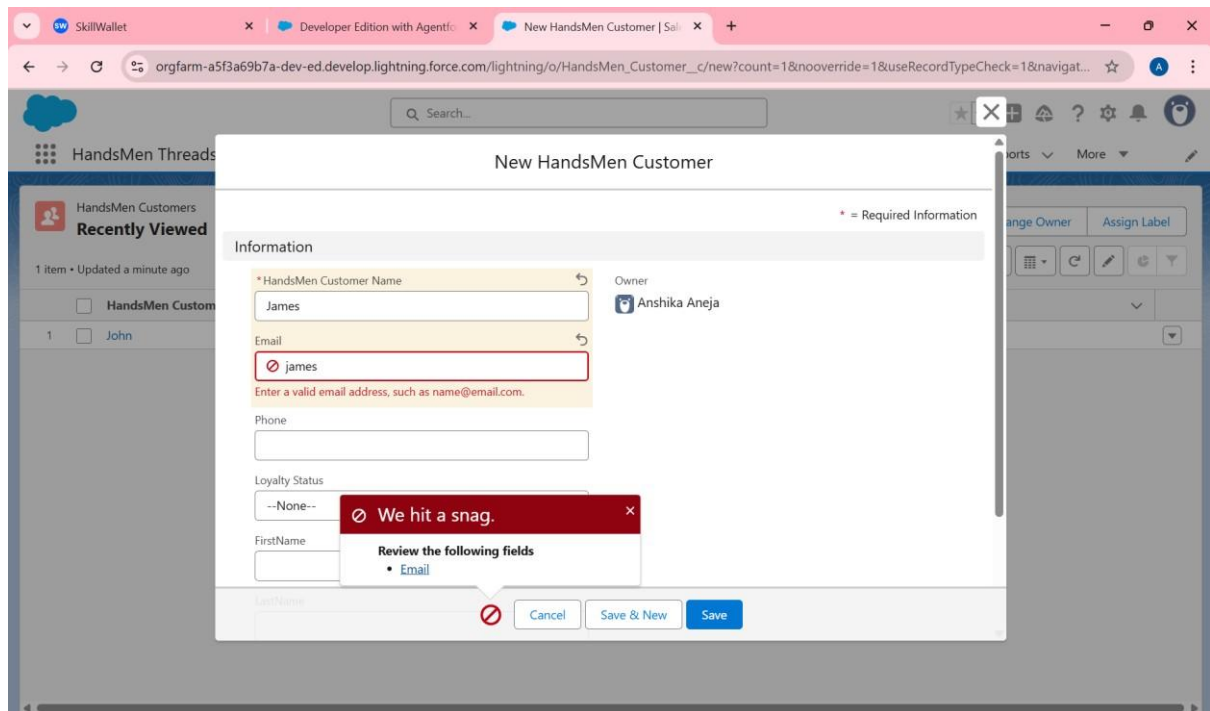
Step 3 – Creating the Lightning App

- A custom Lightning App named *HandsMen Threads* was configured.
- Included tabs: Customers, Products, Orders, Inventory, Campaigns, Reports, etc.
- Assigned to System Administrator profile for testing and deployment.

Step 4 – Validation Rules

Used to ensure data quality and enforce logic:

- On Order Object:
Prevents saving if $\text{Total_Amount_c} \leq 0$.
Error Displayed: “Please Enter Correct Amount.”
- On Customer Object:
Validates that email contains @gmail.com.
Error Displayed: “Please Fill Correct Gmail.”



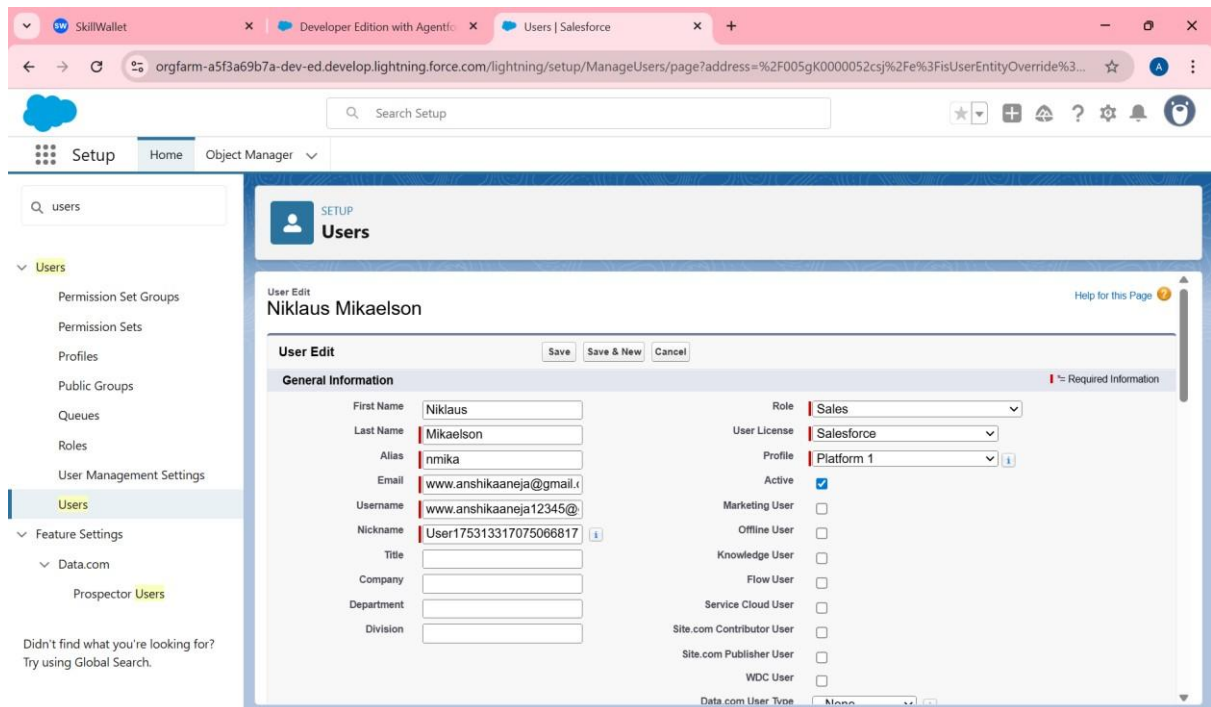
Step 5 – User Role & Profile Setup

- Cloned Standard User into a new profile named Platform 1 with access to all relevant objects.
- Created roles for:
 - Sales Manager ○
 - Inventory
 - Manager ○
 - Marketing Team

Step 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.

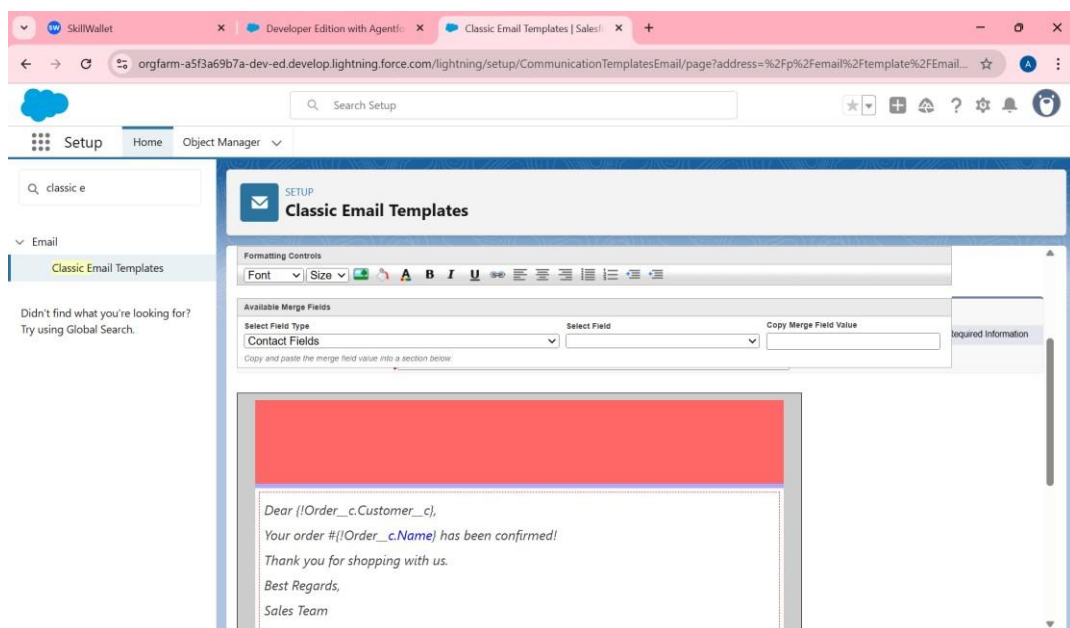


Step 7 – Email Templates & Alerts

Three predefined email templates were configured:

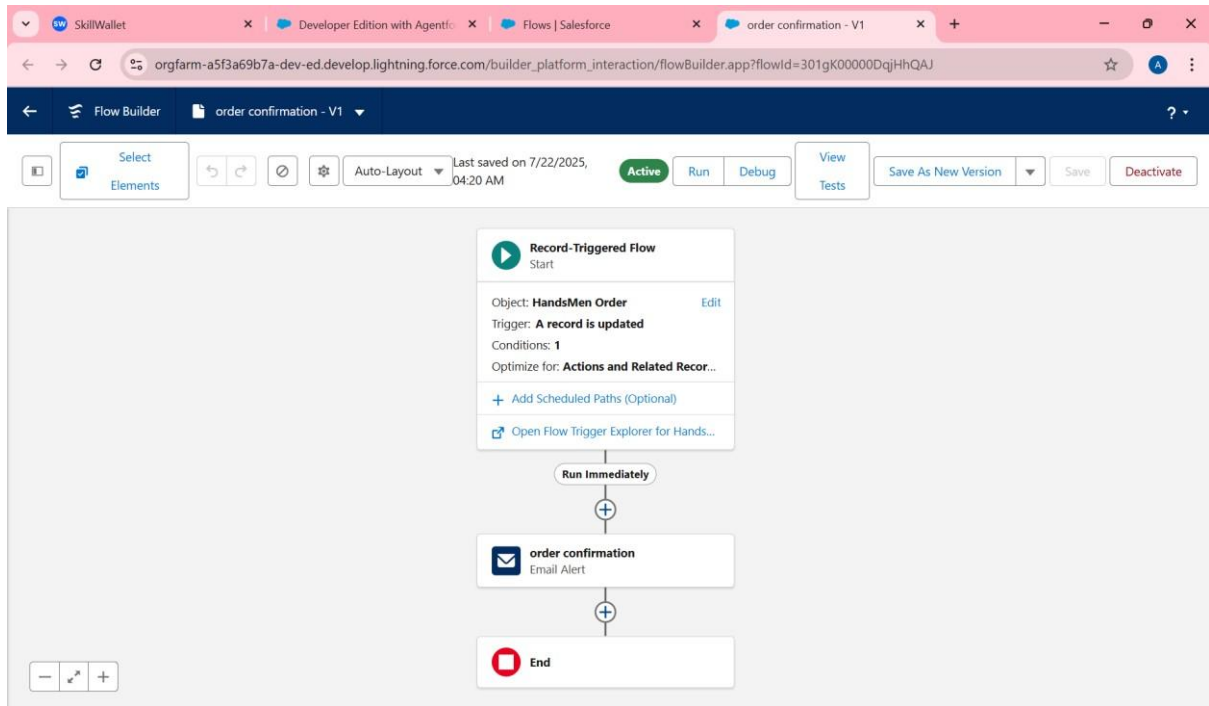
- **Order Confirmation** – Sent on order status = Confirmed
- **Low Stock Alert** – Sent when Inventory < 5 units
- **Loyalty Program Email** – Sent when loyalty status changes

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

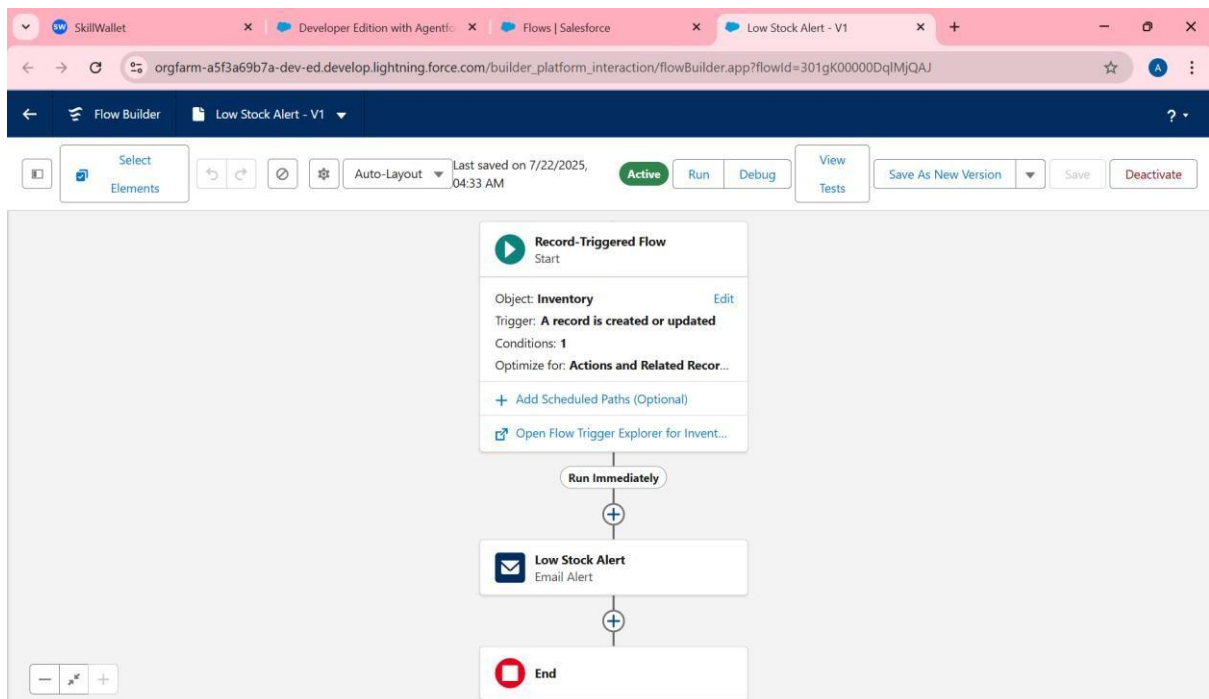


Step 8 – Flow Implementations

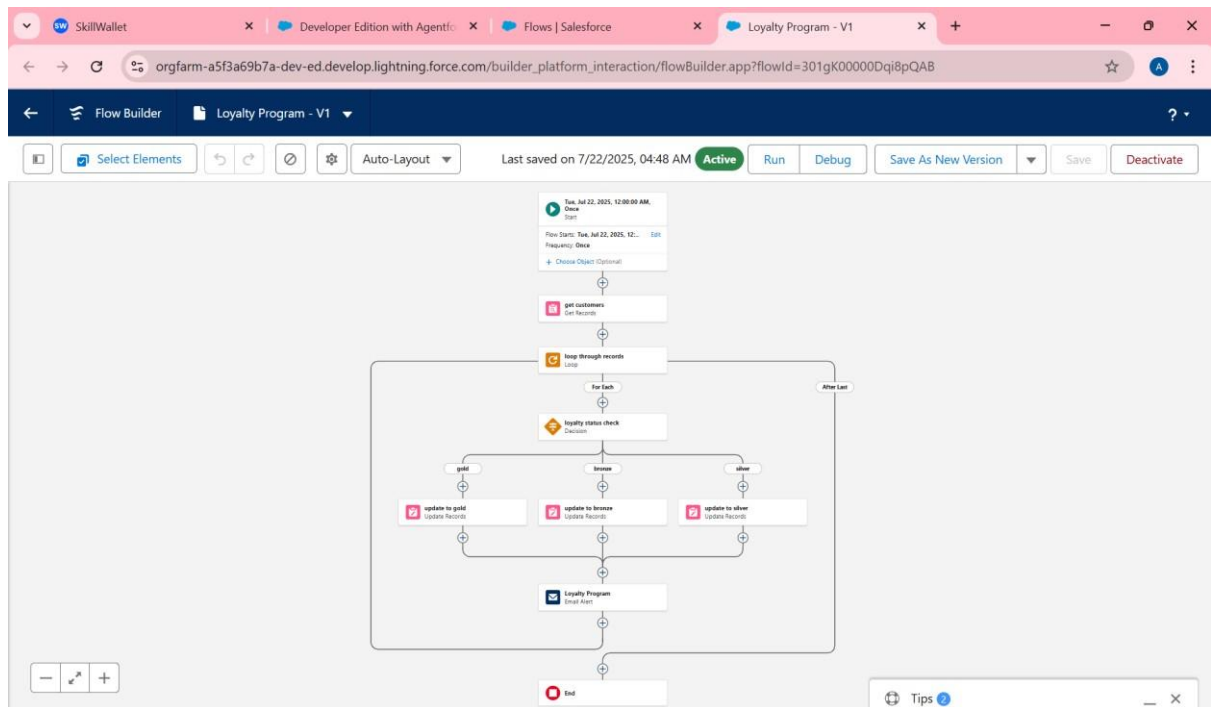
- **Order Confirmation Flow:** Sends a confirmation email to the customer when order is confirmed.



- **Low Stock Alert Flow:** Alerts the Inventory Manager when stock quantity drops below 5.



- **Scheduled Loyalty Flow:** Runs nightly (12:00 AM) to review customers and update their loyalty status based on total purchases.



Step 9 – 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 walkthrough it like a real customer interaction

1. Customer Registration

- A customer, Siya 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

- Siya 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:

- $< ₹500 \rightarrow \text{Bronze}$
- $₹500 - ₹1000 \rightarrow \text{Silver}$

- > ₹1000 → Gold
- So, Siya 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

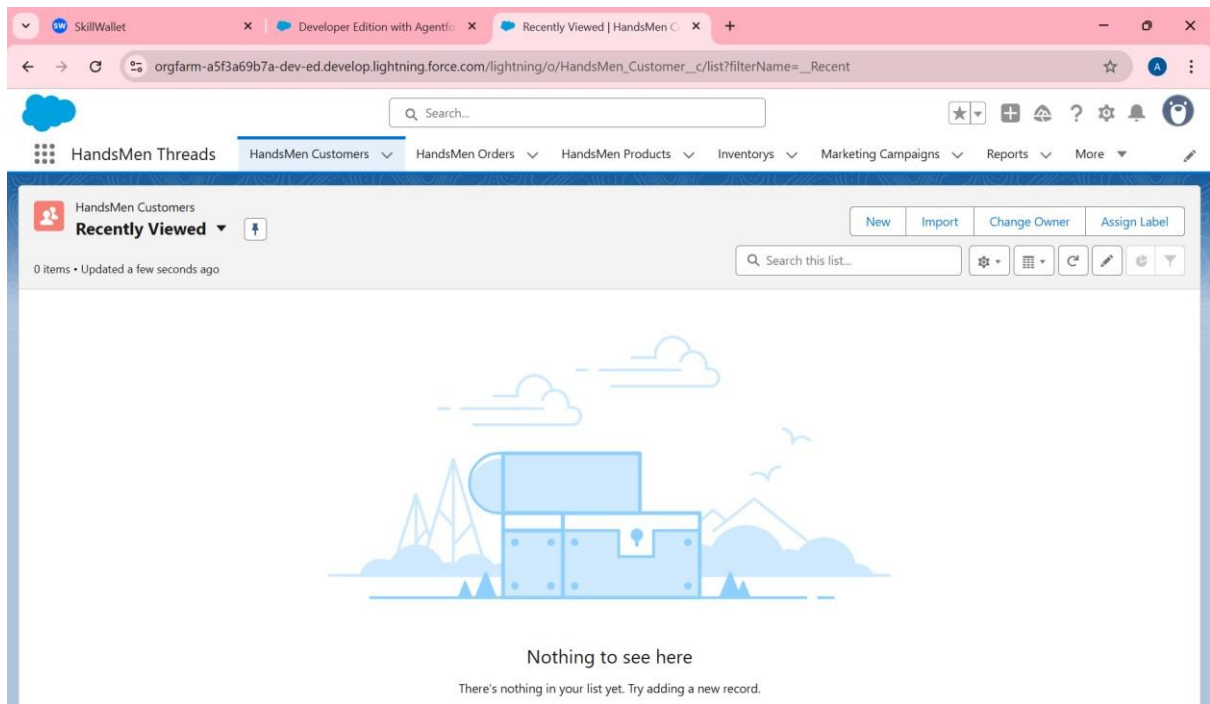


Fig: Custom App for HandsMen Threads

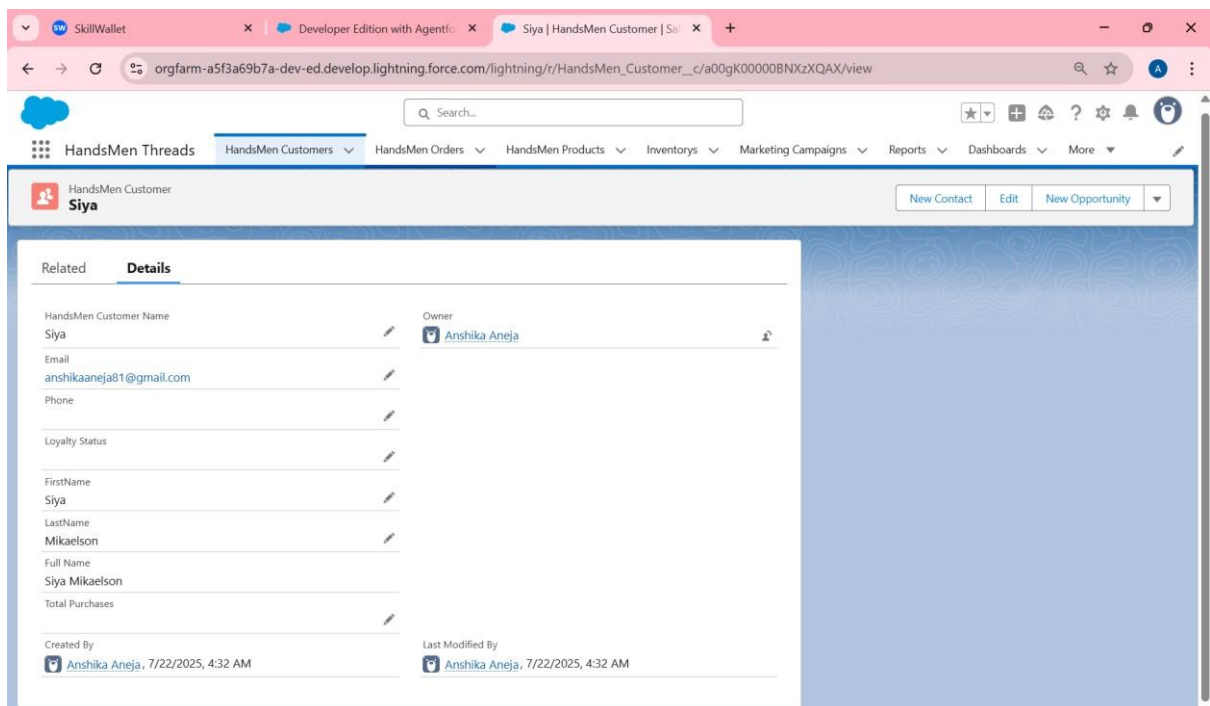


Fig: Customer Creation in HandsMen Threads

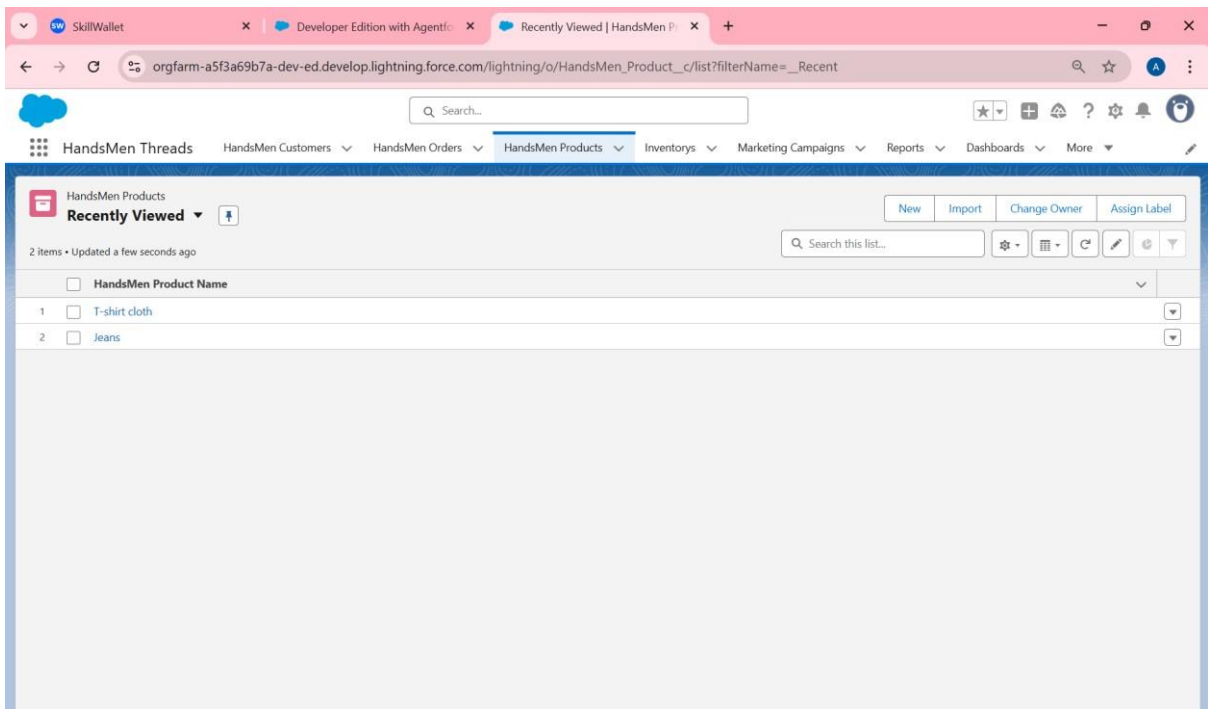


Fig: Products in HandsMen Threads

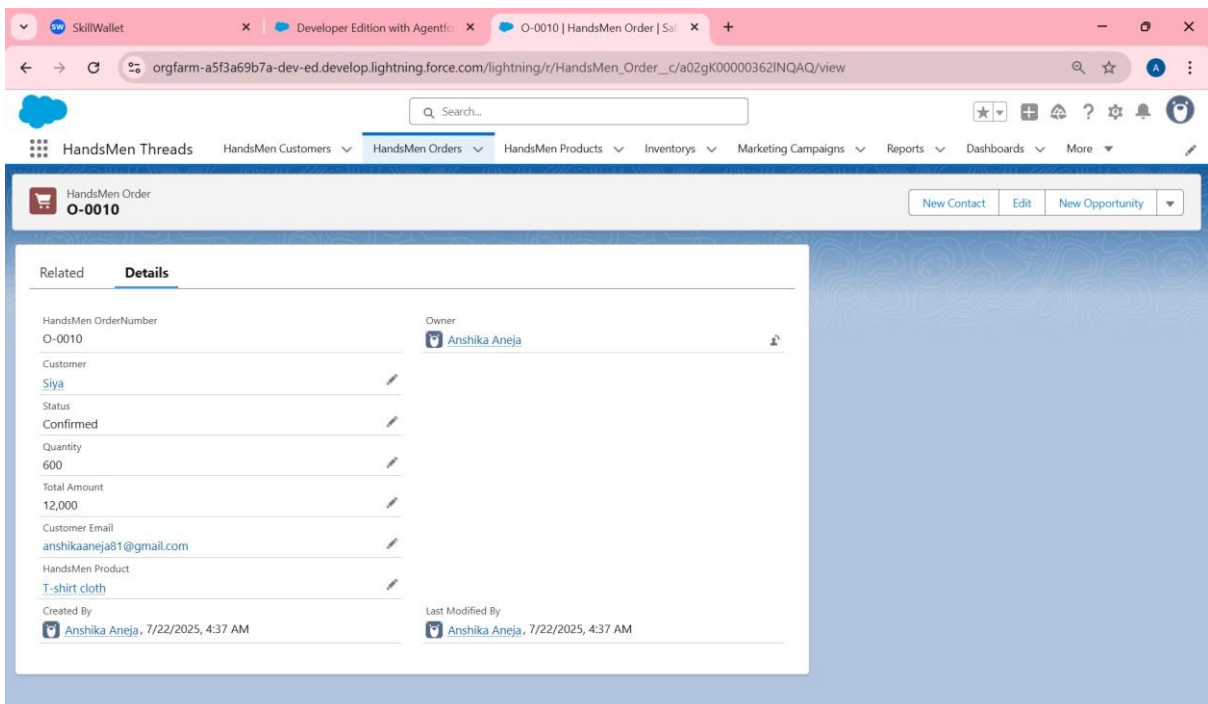


Fig: Order Confirmation

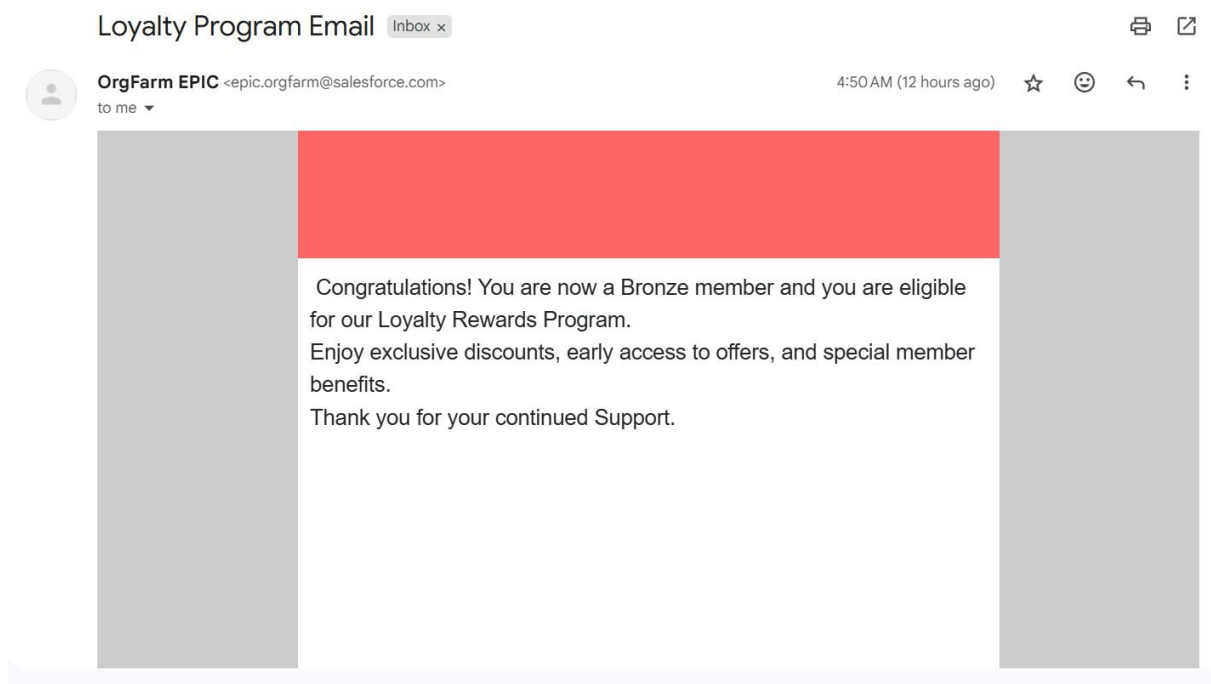


Fig: Loyalty Program Email

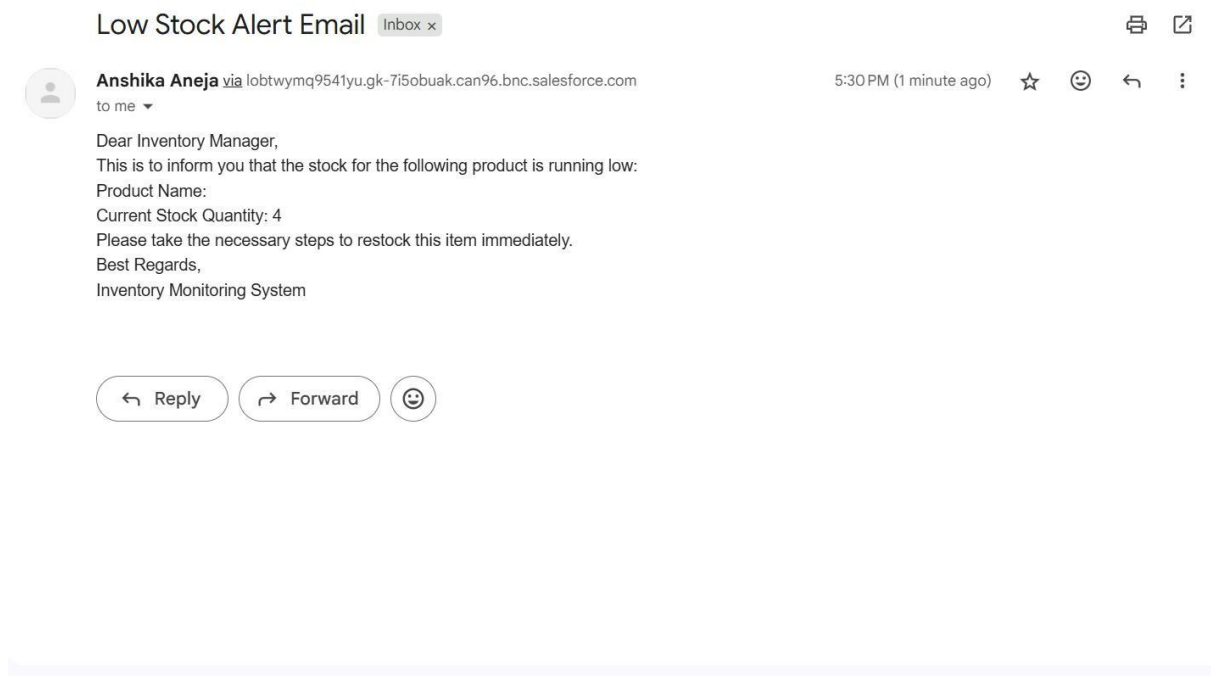


Fig: Low Stock Alert Email

CONCLUSION

The Salesforce-powered CRM for HandsMen Threads successfully automates customer management, order tracking, product cataloging, inventory control, and loyalty programs.

By utilizing Flows, Validation Rules, Email Alerts, and Apex, the solution:

- Reduces manual effort.
- Ensures real-time, error-free operations.
- Delivers personalized customer engagement.

FUTURE SCOPE

- Customer Community Portal for self-service order tracking and loyalty viewing.
- Salesforce Mobile SDK App for on-the-go inventory and order management by store staff.
- Dynamic Dashboards & Reports for real-time business insights.
- AI Recommendations via Einstein for product suggestions.
- WhatsApp/SMS Notifications for instant order and loyalty updates.