

HandsMen Threads CRM: Streamlining Sophistication in Men's Fashion with Salesforce

ABSTRACT:

This project showcases the design and implementation of a customized Salesforce CRM system for HandsMen Threads, a high-end men's fashion and tailoring brand. The solution was crafted to simplify daily operations, enhance customer relationships, and ensure data remains consistent and reliable across teams.

At the heart of the system are five key custom objects such as Customer, Product, Order, Inventory, and Marketing Campaign, each reflecting a major function of the business. Business logic was automated using Salesforce tools like Flows, Apex triggers, and scheduled jobs to handle tasks such as confirming orders, updating loyalty status, and sending low-stock alerts.

To maintain data accuracy, validation rules were introduced, and a clear role-based security model was created for Sales, Inventory, and Marketing teams. This CRM setup not only improves internal coordination and customer engagement but also builds a solid, scalable platform to support future growth.

OBJECTIVES:

The main aim of this project is to build a Salesforce-based CRM system tailored specifically for HandsMen Threads, with the goal of improving operational efficiency, minimizing manual errors, and delivering a better customer experience.

The project focuses on:

- Building a centralized system to manage customers, orders, products, inventory, and marketing campaigns.
 - Automating repetitive tasks such as sending order confirmations, tracking stock levels, and managing loyalty rewards.
 - Validating user input to ensure clean, standardized data entry.
 - Giving real-time visibility into customer interactions and stock availability.
 - Controlling access based on roles so each team sees only what they need.
 - Enabling personalized communication to strengthen customer loyalty and satisfaction.
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TECHNOLOGY OVERVIEW:

a) Salesforce Platform

Salesforce is a cloud-based Customer Relationship Management (CRM) platform used to manage customer data, automate business processes, and support key functions like sales, inventory, and marketing. It offers both no-code tools such as Flows and Validation Rules and programmatic features like Apex to build custom business solutions.

b) Custom Objects

To represent the business processes of HandsMen Threads, the following five custom objects were created:

- **HandsMen_Customer_c :**
Stores customer details such as name, phone number, email address, and loyalty status.
- **HandsMen_Product_c :**
Maintains the product catalog, including SKU, product name, unit price, and stock level.
- **HandsMen_Order_c**
Records orders placed by customers, including product details, quantity, total amount, and order status.
- **Inventory_c :**
Tracks available stock for each product and its corresponding warehouse location.
- **Marketing_Campaign_c :**
Stores promotional campaign details, including campaign name, type, and schedule.

c) Lightning App and Tabs

A custom Lightning App named “HandsMen Threads” was created to group the relevant custom object tabs together. Tabs were added for: HandsMen Customer, HandsMen Product, HandsMen Order, Inventory, Marketing Campaign. This app provides users with a centralized and organized interface to access and manage records easily.

d) Profiles, Roles, and Permission Sets

- A custom profile called Platform 1 was created by cloning the Standard User profile. It provides access to all the necessary custom objects.
- Roles such as Sales Manager, Inventory Manager, and Marketing Team were set up to define data visibility and reporting structure.
- Permission Sets were used to grant additional access to users without altering their primary profile.

e) Validation Rules

Validation Rules were implemented to maintain data accuracy and business logic compliance:

- On HandsMen_Customer__c: Ensures the email field contains "@gmail.com".
- On HandsMen_Order__c: Prevents saving an order if the total amount is zero.

f) Email Templates and Alerts

Three email templates were created:

- Order Confirmation – sent when an order is confirmed.
- Low Stock Alert – sent when inventory quantity drops below five units.
- Loyalty Program Notification – sent when a customer's loyalty status is updated.

These templates are triggered automatically using Email Alerts connected to Flows.

g) Flow Automation

Salesforce Flows were used to automate key processes:

- Order Confirmation Flow:
Triggered when the order status is updated to "Confirmed"; sends a confirmation email to the customer.
- Low Stock Alert Flow:
Triggered when the stock level in Inventory__c drops below the defined threshold; sends an alert to the inventory team.
- Loyalty Status Program Flow:
Runs daily to check customer purchase totals and update loyalty levels in HandsMen_Customer__c.

h) Apex Triggers

Custom Apex triggers were implemented for advanced automation:

- On HandsMen_Order__c: Calculates the total order amount based on quantity and product price.
 - On Inventory__c: Deducts ordered quantity from the stock when a new order is confirmed.
 - On HandsMen_Customer__c: Updates the customer's loyalty status based on total purchases.
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EXECUTION OF PROJECT PHASES:

1. Developer Org Setup

- Created a Salesforce Developer Org using the official signup portal.
- Verified account and set login credentials.
- Accessed the Setup page to begin system configuration.

2. Custom Object Creation

- Created five custom objects:
 - HandsMen_Customer__c: Stores detailed information about customers.
 - HandsMen_Product__c: Maintains records of all available products.
 - HandsMen_Order__c: Tracks all orders placed by customers.
 - Inventory__c: Manages the quantity and availability of stock.
 - Marketing_Campaign__c: Holds data about ongoing and past marketing campaigns.
- Steps followed:
 - Navigated to Setup > Object Manager > Create > Custom Object.
 - Added label, object name, enabled reporting and search.
 - Created corresponding tabs for each object.

3. Lightning App Creation

- Developed a custom Lightning App named HandsMen Threads.
- Added tabs for: HandsMen Customer, HandsMen Product, HandsMen Order, Inventory, Marketing Campaign, Reports and Dashboards etc.
- Assigned the app to the System Administrator profile.

4. Validation Rules

- Implemented to ensure accurate data entry:
 - On HandsMen_Customer__c: Email must contain "@gmail.com".
 - Error: "Please fill Correct Gmail."
 - On HandsMen_Order__c: Total amount cannot be zero.
 - Error: "Please Enter Correct Amount."

5. User Roles and Profiles

- Cloned Standard User profile to create Platform 1.
- Granted required object-level access.
- Created department-based roles:
 - Sales Manager
 - Inventory Manager
 - Marketing Team

6. User Creation

- Created Salesforce users and assigned roles:
 - Niklaus Mikaelson - Assigned to Sales Manager role.
 - Kol Mikaelson - Assigned to Inventory Manager role.
- Role-based structure ensures proper data visibility and control.

7. Email Templates and Alerts

- Created three email templates:
 - Order Confirmation - Sent when order status is confirmed.
 - Low Stock Alert - Sent when inventory < 5 units.
 - Loyalty Program Notification - Sent when loyalty status changes.
- Configured corresponding Email Alerts to trigger these templates via Flows.

8. Flow Implementations

- Order Confirmation Flow
 - Trigger: When HandsMen_Order_c status = "Confirmed".
 - Action: Sends order confirmation email.
- Low Stock Alert Flow
 - Trigger: When Inventory_c quantity < 5.
 - Action: Sends alert to Inventory Manager.
- Scheduled Loyalty Update Flow
 - Schedule: Daily at midnight.
 - Action: Loops through HandsMen_Customer_c, updates loyalty status based on total purchases.

9. Apex Trigger Implementations

- Order Total Calculation Trigger
 - Triggered on HandsMen_Order__c creation / update.
 - Calculates Total_Amount_c = Quantity × Product Price.
 - Stock Deduction Trigger
 - Triggered on order confirmation.
 - Reduces inventory stock in Inventory_c by ordered quantity.
 - Loyalty Status Update Trigger
 - Triggered on customer purchase updates.
 - Evaluates total spend and updates loyalty tier (Bronze, Silver, Gold).
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REAL WORLD WALKTHROUGH:

To illustrate the practical application of the “HandsMen Threads” Salesforce solution, consider the following business scenario:

- A customer, Mr. Arjun Rao, places an order for three units of luxury cufflinks.
- The Sales Manager accesses the HandsMen Order tab and records the new order in the system.
- Upon updating the order status to “Confirmed”, an Order Confirmation Email is automatically dispatched to the customer, facilitated by the configured flow.
- Concurrently, the Total Amount is computed via an Apex trigger by multiplying the quantity ordered with the unit price.
- The same trigger initiates inventory deduction from the respective Inventory record, ensuring real-time stock updates.
- If the item’s stock quantity falls below the predefined threshold (5 units), the Low Stock Alert Flow triggers a notification to the Inventory Manager, Mr. Kol Mikaelson.
- At midnight, the Scheduled Loyalty Update Flow evaluates the customer's cumulative purchase value. If eligibility criteria are met, the customer’s loyalty status is upgraded, and an automated email is sent acknowledging the same.

This scenario demonstrates how various Salesforce automation tools such as Flows, Validation Rules, and Apex Triggers work together to enhance operational efficiency and ensure a seamless customer experience.

SCREENSHOTS:

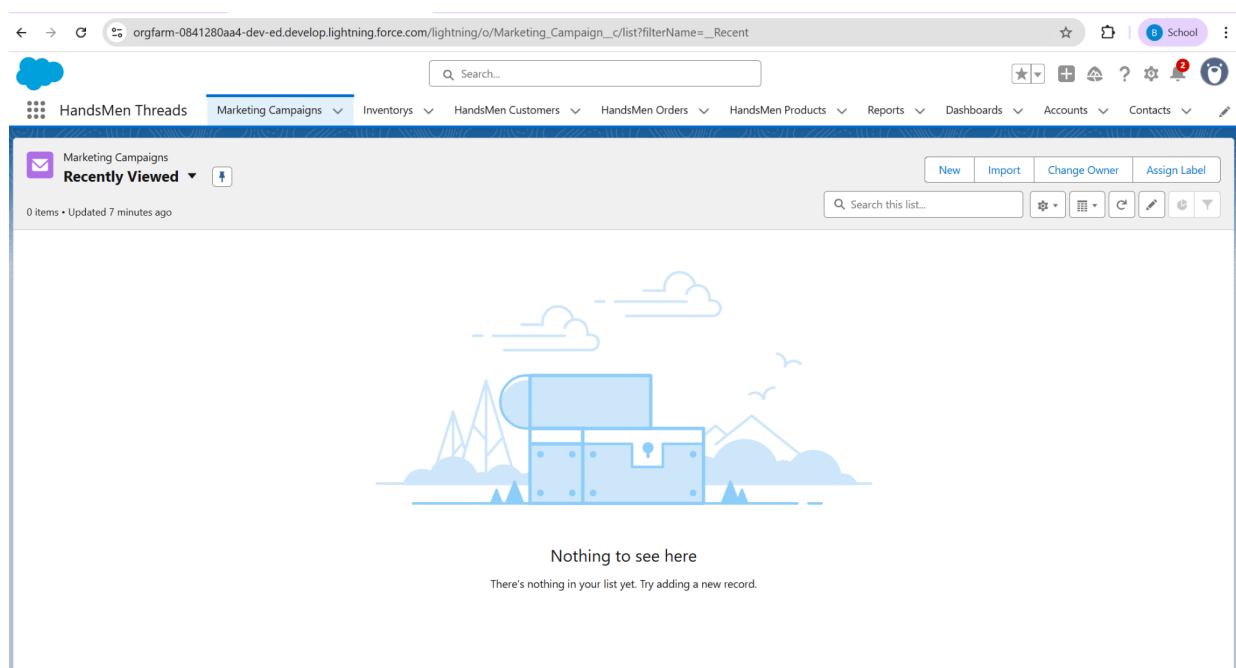


Fig: Customer App For Handsmen

HandsMen Threads Marketing Campaigns Inventoris HandsMen Customers HandsMen Orders HandsMen Products Reports Dashboards Accounts Contacts

HandsMen Customer
SID

New Contact Edit New Opportunity

Related Details

HandsMen Customer Name
SID

Email
bhoomikarai972@gmail.com

Phone

Loyalty Status
Bronze

FirstName
SID

LastName
MAX

FullName
SID MAX

Total Purchases
600

Created By
Bhoomika Rai, 7/17/2025, 5:46 AM

Owner
Bhoomika Rai

Last Modified By
Bhoomika Rai, 7/18/2025, 4:59 AM

Fig: Handsmen Customer Creation

HandsMen Threads Marketing Campaigns Inventoris HandsMen Customers HandsMen Orders HandsMen Products Reports Dashboards Accounts Contacts

HandsMen Products
Recently Viewed

New Import Change Owner Assign Label

1 item • Updated a few seconds ago

Search this list...

HandsMen Product Name

1 MAX Fashion

Fig: Handsmen Product

HandsMen Threads Marketing Campaigns Inventoris HandsMen Customers HandsMen Orders HandsMen Products Reports Dashboards Accounts Contacts

HandsMen Order
O-0003

New Contact Edit New Opportunity

Related Details

HandsMen OrderNumber
O-0003

HandsMen Product
MAX Fashion

HandsMen Customer
SID

Status
Confirmed

Quantity
400

Total Amount
400,000

Customer Email
sid@ex.com

Created By
Bhoomika Rai, 7/18/2025, 5:13 AM

Owner
Bhoomika Rai

Last Modified By
Bhoomika Rai, 7/18/2025, 5:14 AM

Fig: Handsmen Order for Customers

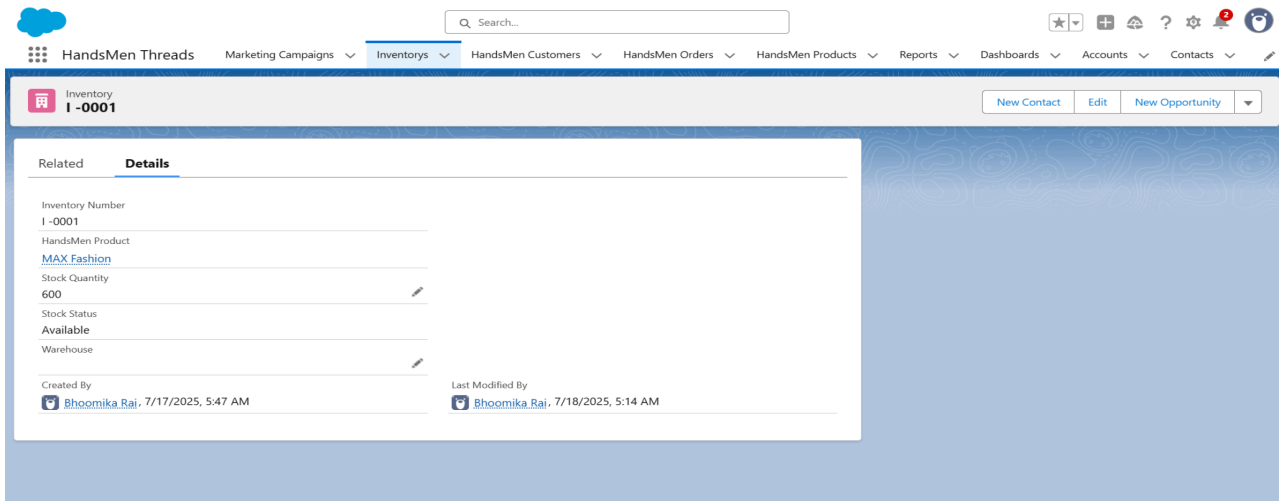


Fig: Inventory Creation

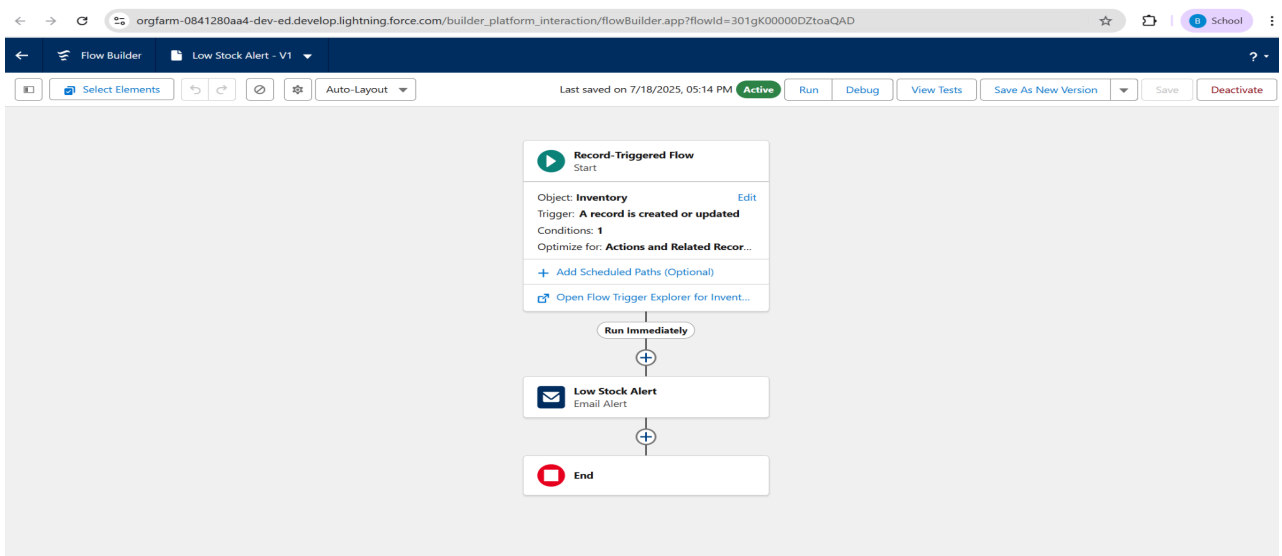


Fig: Low Stock Alert Flow

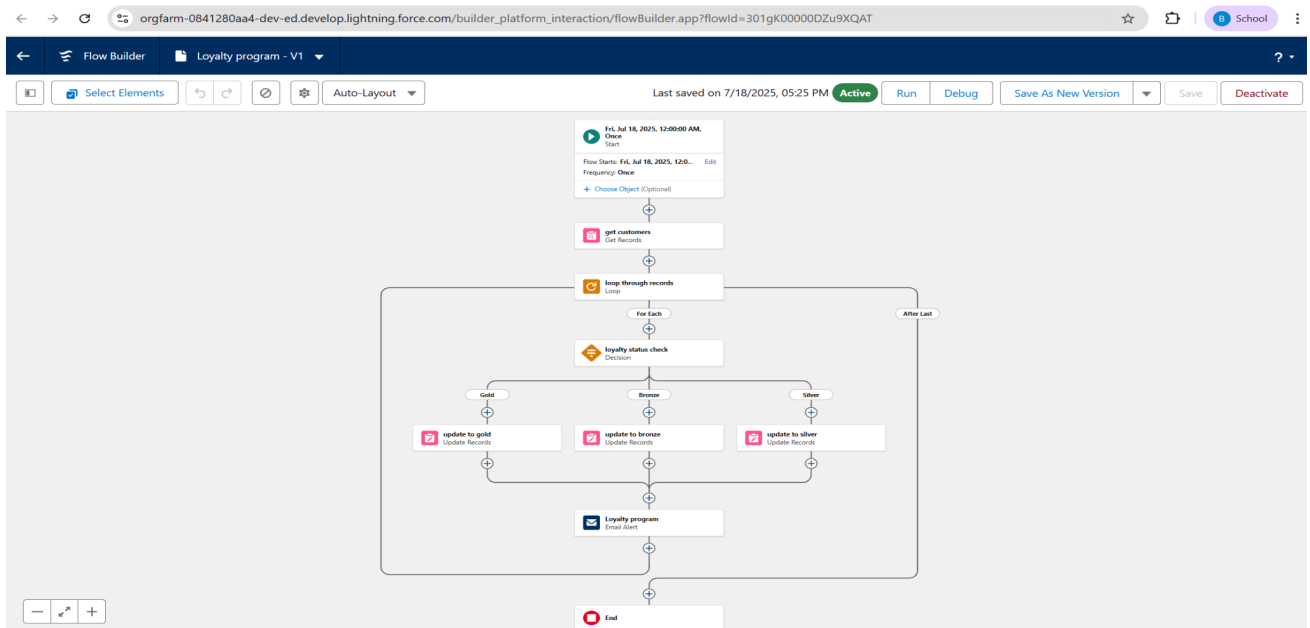


Fig: Loyalty Program Flow

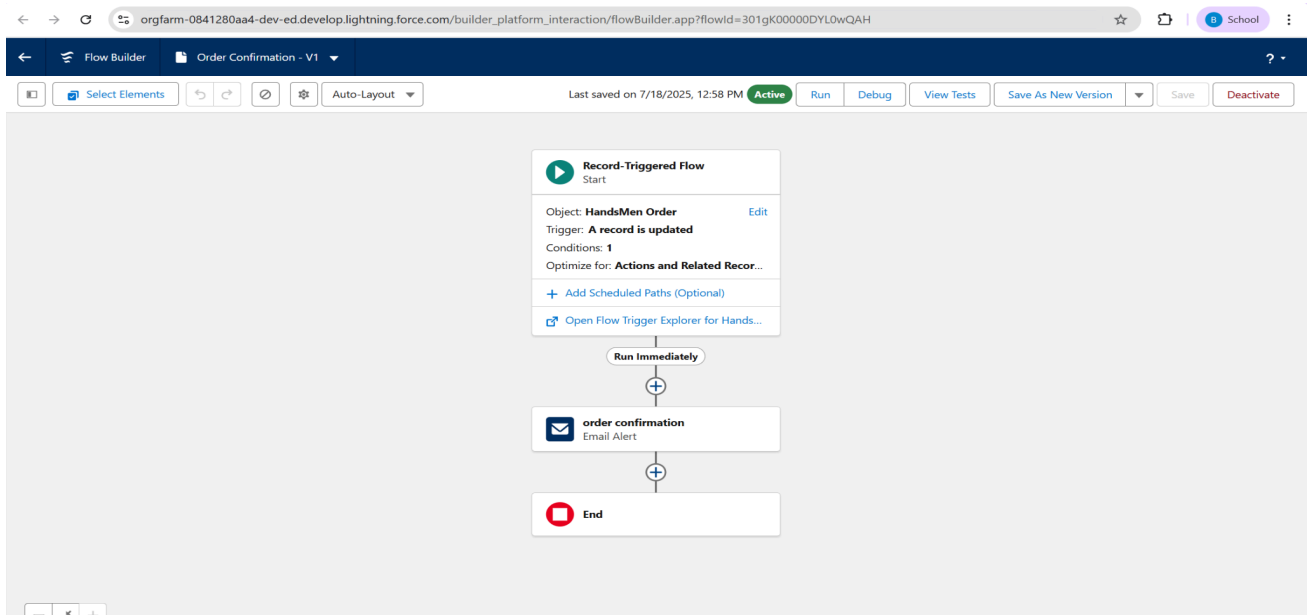


Fig: Order Confirmation Flow

The screenshot shows the Salesforce Setup page, specifically the 'Users' section. The user 'Kol Mikaelson' is highlighted, and their details are displayed. The details include Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Delegated Approver, Manager, Receive Approval Request Emails, Federation ID, App Registration, Role, Inventory, User License, Profile, Active, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Push Registrations, Data.com User Type, Accessibility Mode, Debug Mode, High-Contrast Palette on Charts, and Load Lightning Pages While Scrolling.

Fig: User Kol Mikaelson

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
HandsMen Customer	HandsMen_Customer__c	Custom Object		7/17/2025	✓
HandsMen Order	HandsMen_Order__c	Custom Object		7/17/2025	✓
HandsMen Product	HandsMen_Product__c	Custom Object		7/17/2025	✓

Fig: Custom Objects Created

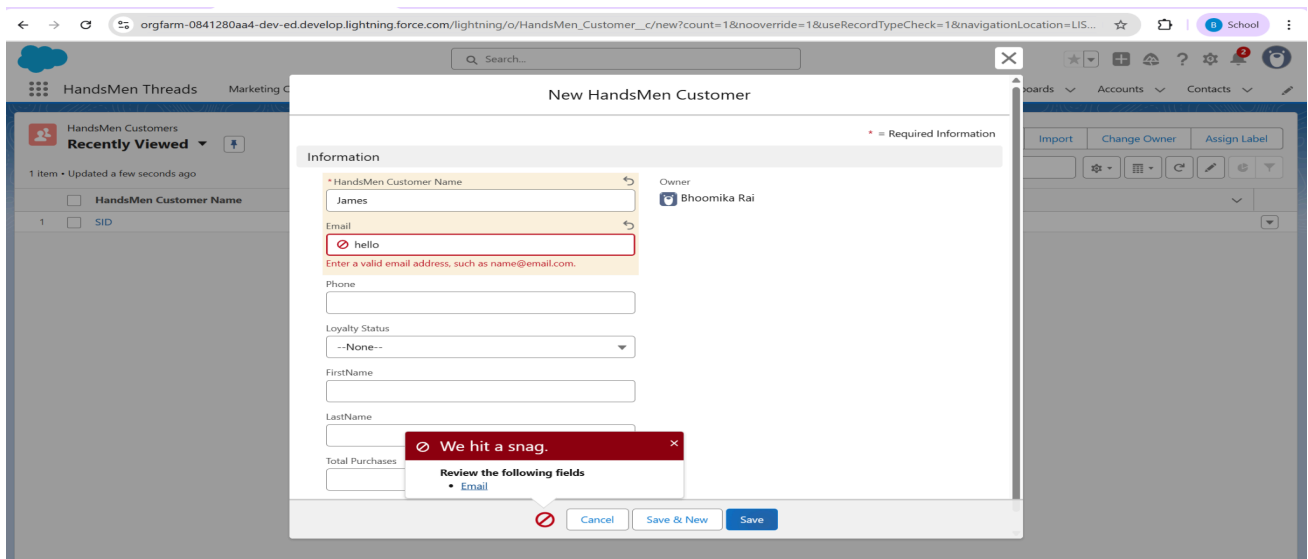


Fig: Customer Validation Error

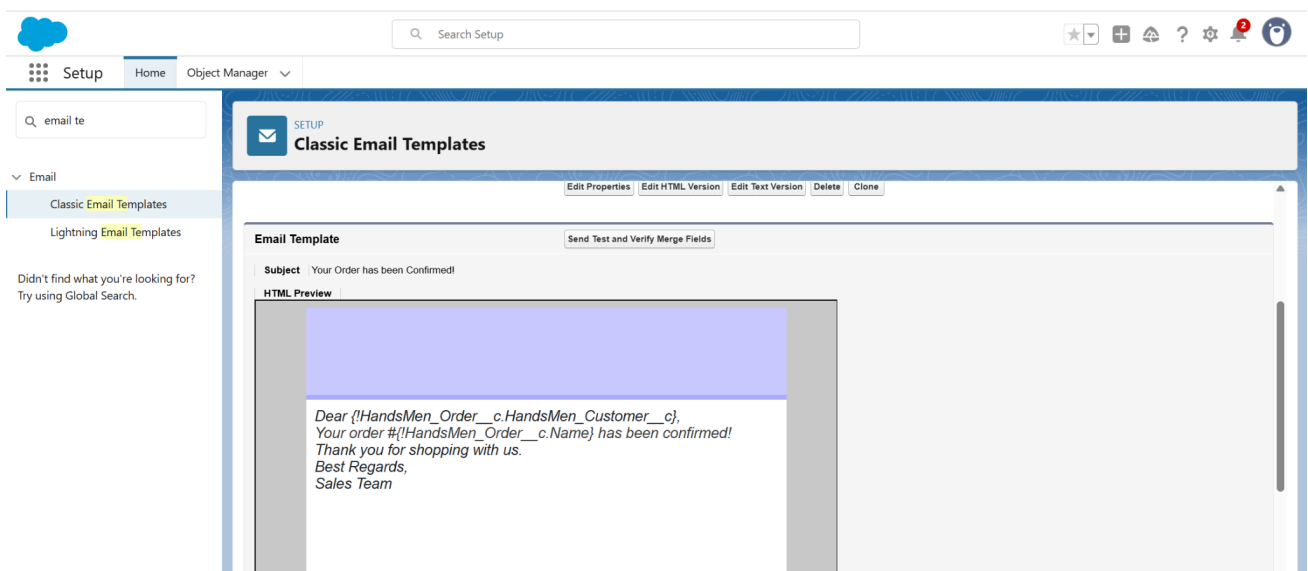


Fig: Classic Email Template

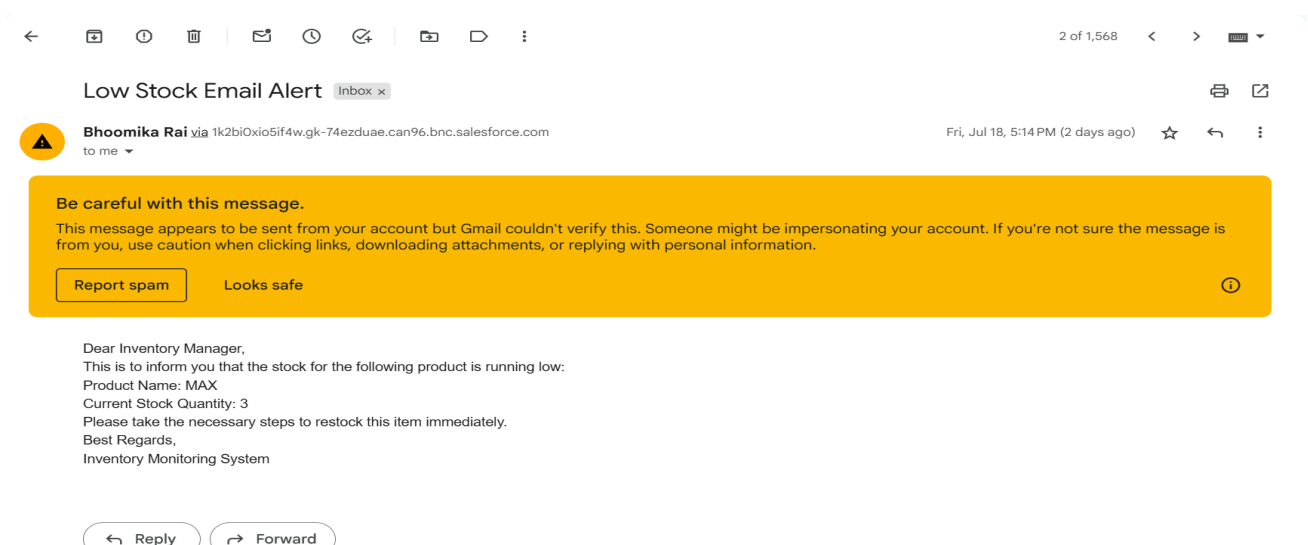


Fig: Low Stock Email

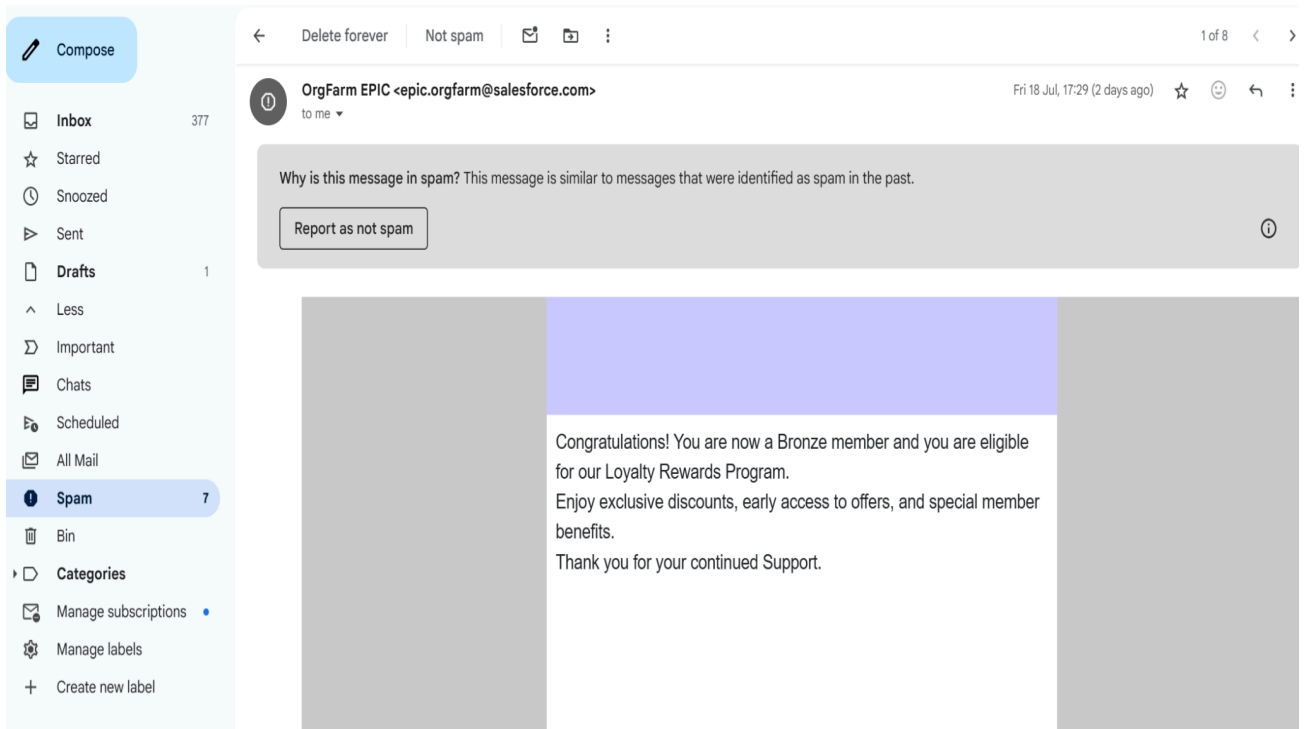


Fig: Loyalty Program Email

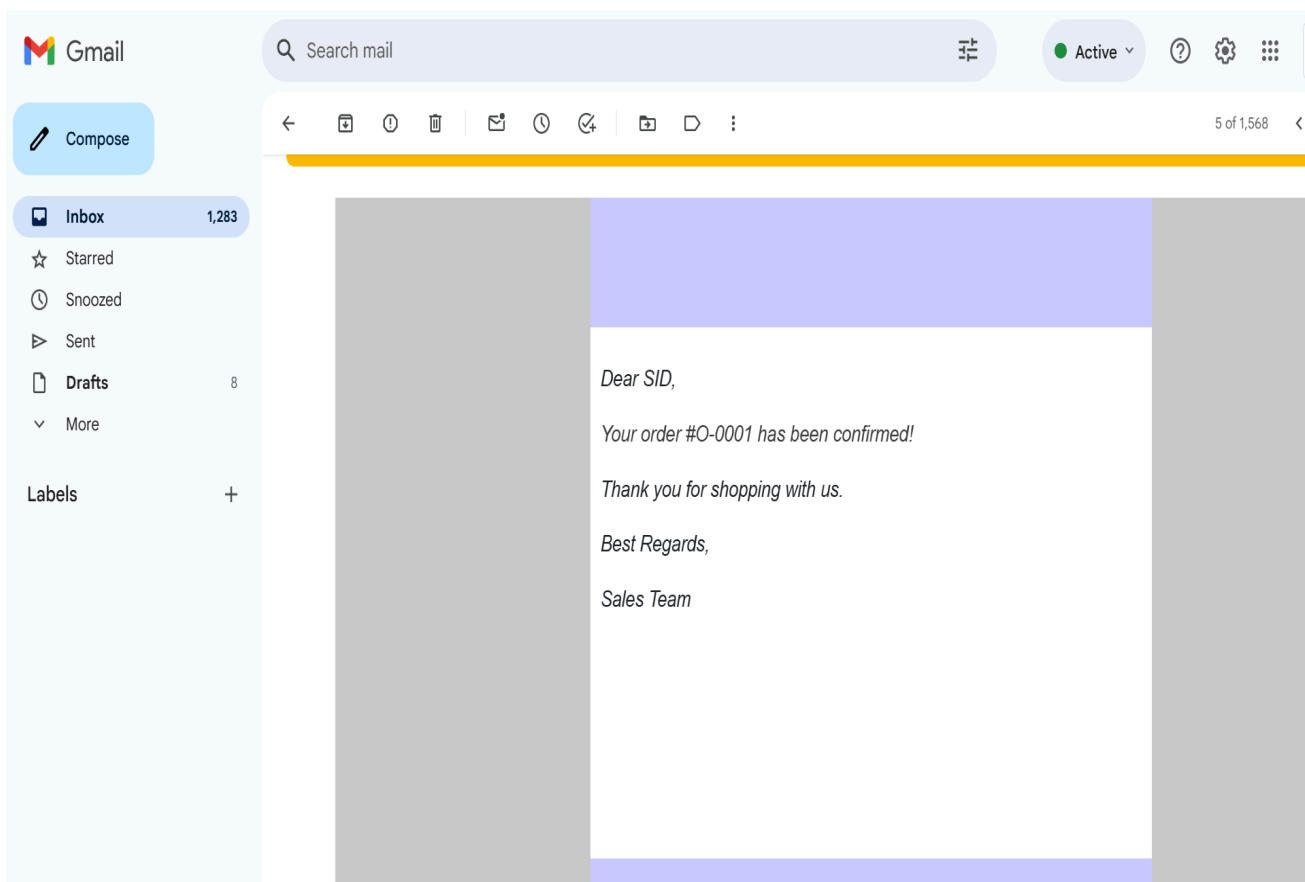


Fig: Order Confirmation Email

CONCLUSION:

The "HandsMen Threads" project successfully demonstrates the capability of the Salesforce platform to digitize and streamline key operations within a men's fashion enterprise. Through the creation of custom objects, implementation of validation mechanisms, and automation using Flows and Apex Triggers, the system facilitates effective order processing, inventory control, and customer engagement. This implementation showcases Salesforce as a scalable, reliable, and user-centric CRM solution, adaptable to a wide range of industry-specific requirements.

FUTURE SCOPE:

The current implementation lays a robust foundation for future enhancements. Potential advancements include:

- Integration with Salesforce Einstein Analytics to derive insights from customer behavior and predict sales trends.
- Mobile Application Development to provide field agents and managers with access to key functionalities on mobile devices.
- Payment Gateway Integration for seamless transaction handling and real-time payment updates within the Salesforce platform.
- Customer Feedback System to gather post-purchase reviews and sentiments, aiding in service improvement.
- Enhanced Loyalty Program featuring reward points, redeemable vouchers, and access to exclusive campaigns.
- Third-Party Logistics (3PL) Integration to automate shipping processes and provide live delivery tracking to customers.

These future enhancements aim to elevate customer satisfaction, improve operational transparency, and expand the system's capabilities to support the business's growth and scalability.
