

HandsMen Threads: Elevating The Art Of Sophistication In Men's Fashion

ABSTRACT

This project outlines the deployment of a tailored Salesforce CRM solution for "**HandsMen Threads**", a high-end men's clothing and tailoring company. The main aim was to optimize internal workflows, improve client interactions, and uphold data accuracy across various functional teams.

The implementation involved crafting a comprehensive data architecture that included five core custom objects: Client, Sales Order, Stock, Item Catalog, and Promotional Campaigns. Key operational workflows were automated using tools such as Record-Triggered Flows, Scheduled Processes, Email Notifications, and Apex code to manage tasks like sending order confirmations, updating loyalty rewards, and issuing real-time inventory alerts.

To uphold data quality, validation protocols were enforced, and a role-based access control system was put in place for departments such as Sales, Inventory Control, and Marketing. Additionally, an automated background job using Apex was developed to regularly synchronize inventory levels.

This end-to-end CRM solution enhances the customer journey through targeted engagement, boosts efficiency through intelligent automation, and establishes a flexible infrastructure to support the brand's long-term growth using the Salesforce ecosystem.

OBJECTIVE

The primary objective of this project is to design and deploy a tailored Salesforce CRM platform for HandsMen Threads that enhances business workflow efficiency, secures data integrity, and boosts customer engagement.

Through the integration of a centralized CRM system to oversee customers, sales, inventory, orders, and marketing efforts, this project strives to:

- **Streamline operational workflows** including order tracking, loyalty program updates, and inventory notifications.

- **Maintain high data accuracy and reliability** by applying validation and automation techniques.
- **Facilitate real-time insights** into product availability and customer activity.
- **Strengthen cross-department collaboration** using secure, role-specific access mechanisms.
- **Enhance customer engagement** by delivering targeted promotions and tailored service experiences.

TECHNOLOGY DESCRIPTION

Salesforce:-

Salesforce is a cloud-based CRM (Customer Relationship Management) platform designed to help organizations manage customer relationships, automate routine tasks, and optimize marketing, service, and sales functions. It offers both no-code tools and developer-friendly features (such as Apex and Flow) to build customized business applications.

Custom Objects:-

In Salesforce, custom objects function similarly to database tables. They are created to store data that is unique to a particular business need. For example:

- Customer__c – Used to save customer-related information
- Product__c – Contains product-specific data
- Order__c – Keeps track of customer orders

Tabs:-

Tabs in Salesforce are used to present object data within the user interface. For instance, a tab for Product__c lets users access and manage product entries with ease.

Custom App:-

A custom app in Salesforce is essentially a group of related tabs organized to serve a particular business goal. It provides users with a dedicated space to interact with relevant data and functionalities efficiently.

Profiles:

In Salesforce, profiles define the scope of actions a user can perform. They manage access to objects, fields, and overall functionality available to a user based on their role.

Roles:-

Roles manage the visibility of records based on the organizational hierarchy in Salesforce. They are mainly used to control sharing and reporting access among users.

Permission Sets:-

Permission Sets are used to grant extra access rights to users without altering their original profile. They provide flexibility in managing permissions across different users.

Validation Rules:-

Validation rules check whether the input data follows specific business logic before saving it.

Examples:

- Email should include "@gmail.com"
- Stock quantity must be greater than or equal to zero

Email Templates:-

Email Templates are pre-designed formats used to send consistent messages to users or customers.

Example:

- Order confirmation emails

Email Alerts:-

Email Alerts are automated messages sent when a specified condition is met in a process or workflow.

Example:

- An alert sent when a loyalty level is updated

Flows:-

Flows are automation tools that allow users to design logic to create, update, or notify records without writing code.

Example:

- A flow that sends an alert email when a new order is placed

Apex:-

Apex is Salesforce's proprietary programming language used for writing custom backend logic.

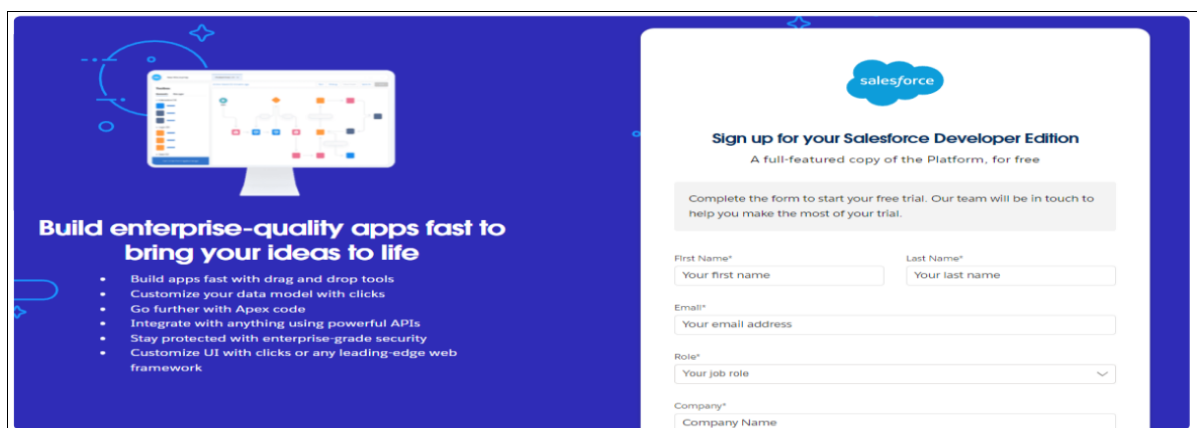
Examples of triggers written in Apex:

- Automatically updating the Total_Amount__c field in orders
- Reducing stock levels after a purchase

DETAILED EXECUTION OF PROJECT PHASES

1. Developer Org Setup

- A new Salesforce Developer Org was set up through the official sign-up <https://developer.salesforce.com/signup>
- After successful registration, the developer account was verified, a secure password was created, and login access was granted to the Salesforce Setup.
- This environment served as the workspace for configuring custom objects, building automation flows, and deploying app features.



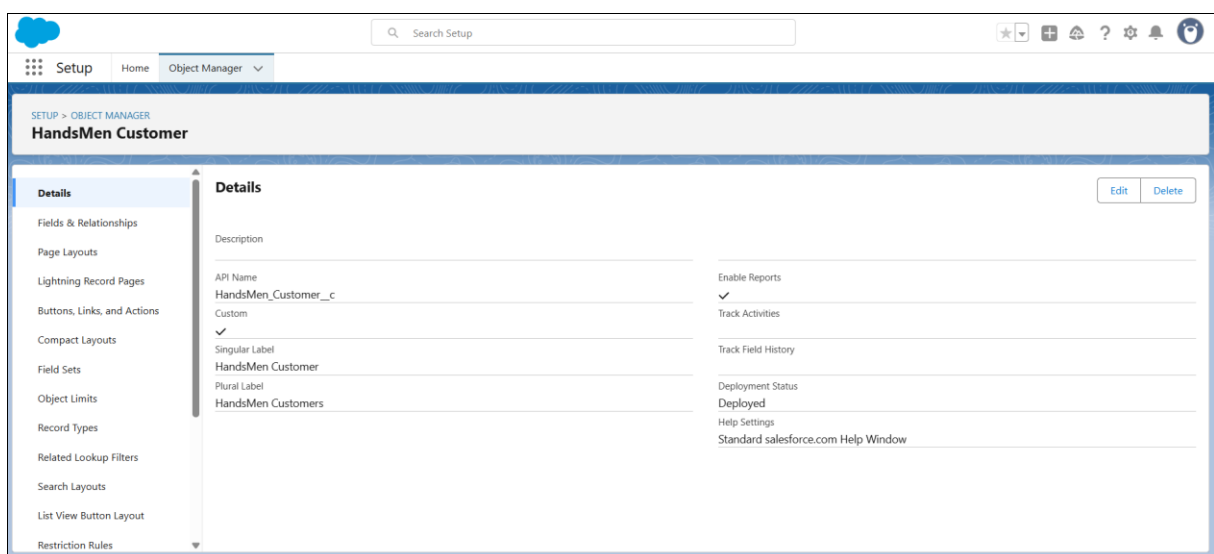
2. Creation of Custom Objects

To support critical business operations, five custom objects were developed within Salesforce:

- **HandsMen Customer** – Stores customer-related information such as name, email address, phone number, and loyalty membership status.
- **HandsMen Product** – Holds product catalog data including SKU, pricing, and stock availability.
- **HandsMen Order** – Maintains order records from customers, detailing item quantities and order statuses.
- **Inventory** – Manages current stock levels and maps warehouse storage locations.
- **Marketing Campaign** – Organizes promotional events and scheduling for marketing initiatives.

Implementation Steps:-

- Accessed **Setup** → **Object Manager** → Selected **Create** → **Custom Object**.
- Defined object properties like **Label**, **API Name**, enabled **Reporting** and **Search** options.
- Saved each object and created associated **Tabs** to enable user-friendly navigation.



3. Creating the Lightning App

- A custom Lightning App titled **HandsMen Threads** was designed to centralize key business functions.
- The app featured essential tabs such as: **HandsMen Customer, Order, Product, Inventory, Campaign, Reports**, and more for seamless navigation.
- The app was made accessible to users under the **System Administrator** profile to allow full control and configuration.

4. Validation Rules

To maintain data quality and enforce business logic constraints, specific validation rules were configured:

- **Order Object:** Ensures that the Total_Amount__c value is greater than zero. **Error Message:** "Please Enter Correct Amount"
- **Customer Object:** Verifies that the email field contains "@gmail.com". **Error Message:** "Please fill Correct Gmail"

The screenshot shows the 'New HandsMen Customer' form in Salesforce. The form is titled 'New HandsMen Customer' and includes a legend indicating that '*' denotes required information. The form is divided into sections: 'Information' and 'Owner'. The 'Information' section contains the following fields:

- * HandsMen Customer Name:** A text field containing 'james'.
- Email:** A text field containing 'james'. This field is highlighted with a red border and a red error icon, indicating a validation error. A tooltip message reads: 'Enter a valid email address, such as name@email.com.'
- Phone:** An empty text field.
- Loyalty Status:** A dropdown menu currently set to '--None--'.
- FirstName:** An empty text field.
- LastName:** An empty text field.

The 'Owner' section shows the user 'Borra Poojitha' with a profile icon. At the bottom of the form, there are three buttons: 'Cancel', 'Save & New', and 'Save'. A red error message box is overlaid on the form, stating: 'We hit a snag. Review the following fields: • Email'.

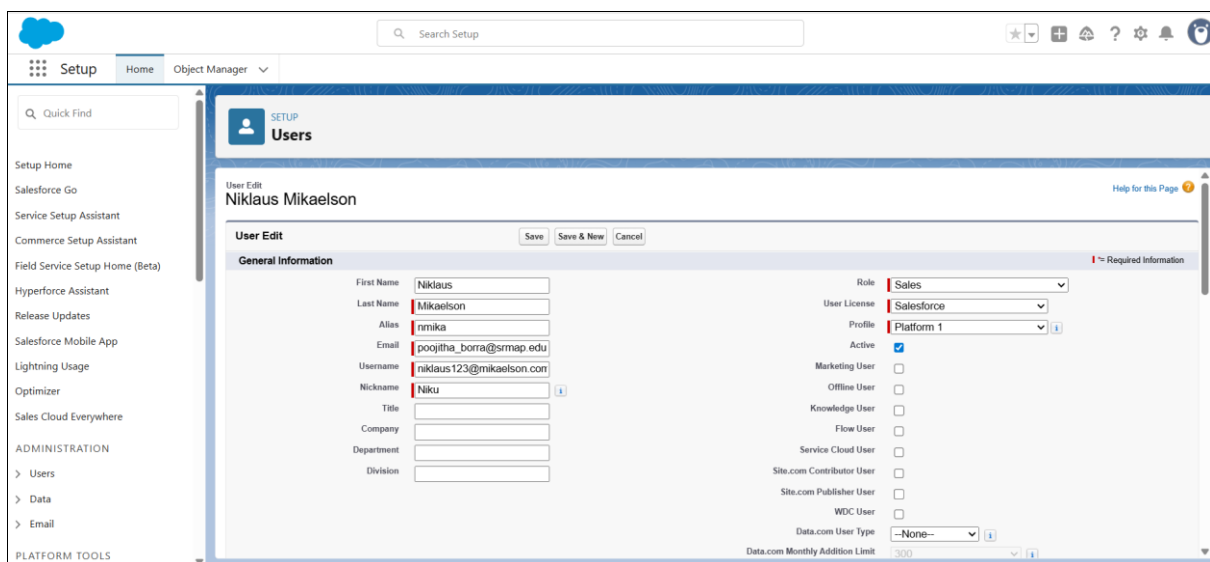
5. User Roles and Profiles

- The **Standard User** profile was duplicated to create a customized profile named **Platform 1**, with added permissions to access relevant custom objects based on business requirements.
- Distinct **roles** were established to align with departmental responsibilities, including:
 - **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.



The screenshot displays the Salesforce Setup interface, specifically the 'Users' section. The 'User Edit' form for 'Niklaus Mikaelson' is open. The form is divided into two main sections: 'General Information' and 'Permissions'. In the 'General Information' section, fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division are visible. The 'Permissions' section includes a 'Role' dropdown set to 'Sales', a 'User License' dropdown set to 'Salesforce', and a 'Profile' dropdown set to 'Platform 1'. There are also checkboxes for 'Active', 'Marketing User', 'Offline User', 'Knowledge User', 'Flow User', 'Service Cloud User', 'Site.com Contributor User', 'Site.com Publisher User', and 'WDC User'. A 'Data.com User Type' dropdown is set to 'None', and a 'Data.com Monthly Addition Limit' is set to '300'. The left sidebar shows the 'Setup' menu with options like 'Quick Find', 'Setup Home', 'Salesforce Go', 'Service Setup Assistant', 'Commerce Setup Assistant', 'Field Service Setup Home (Beta)', 'Hyperforce Assistant', 'Release Updates', 'Salesforce Mobile App', 'Lightning Usage', 'Optimizer', 'Sales Cloud Everywhere', and 'ADMINISTRATION'.

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.

Classic Email Templates

HTML Email Template

Order_Confirmation_Email

Preview your email template below.

Email Template Detail

Email Templates from Salesforce

Unified Public Classic Email Templates

Email Template Name

Order_Confirmation_Email

Template Unique Name

Order_Confirmation_Email

Classic Letterhead

HandsMen Threads

Email Layout

Free Form Letter

Encoding

Unicode (UTF-8)

Author

Borra Poojitha (Change)

Description

Created By

Borra Poojitha, 7/15/2025, 5:11 AM

Available For Use

✓

Last Used Date

Times Used

Edit Properties

Edit HTML Version

Edit Text Version

Delete

Clone

Modified By

Borra Poojitha, 7/15/2025, 9:57 AM

Email Template

Send Test and Verify Merge Fields

Subject | Your Order has been Confirmed!

HTML Preview

Dear [!HandsMen_Order__c.HandsMen_Customer__c],

Your order #[!HandsMen_Order__c.Name] has been confirmed!

Thank you for shopping with us.

Best Regards,

Sales Team

Your Order has been Confirmed!

Personal email via itfa8vjbm3yps.gl-6mbzhuai.can98.bnc.salesforce.com

to poojithaborra03@gmail.com, me

Why is this message in spam? This message is similar to messages that were identified as spam in the past.

Report as not spam

Dear john,

Your order #O-0002 has been confirmed!

Thank you for shopping with us.

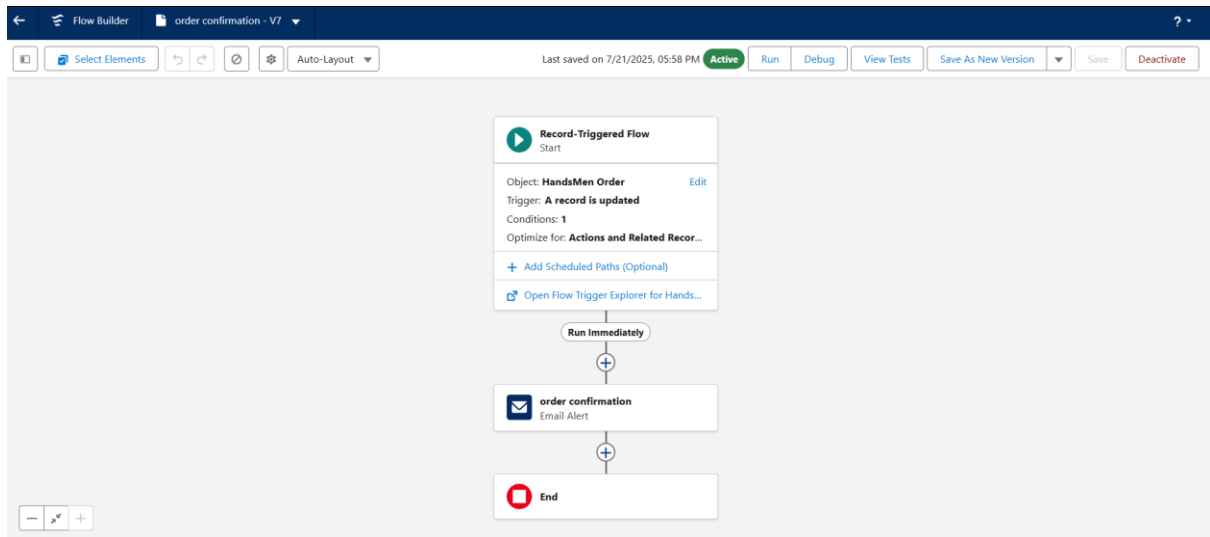
Best Regards,

Sales Team

8. Flow Implementations

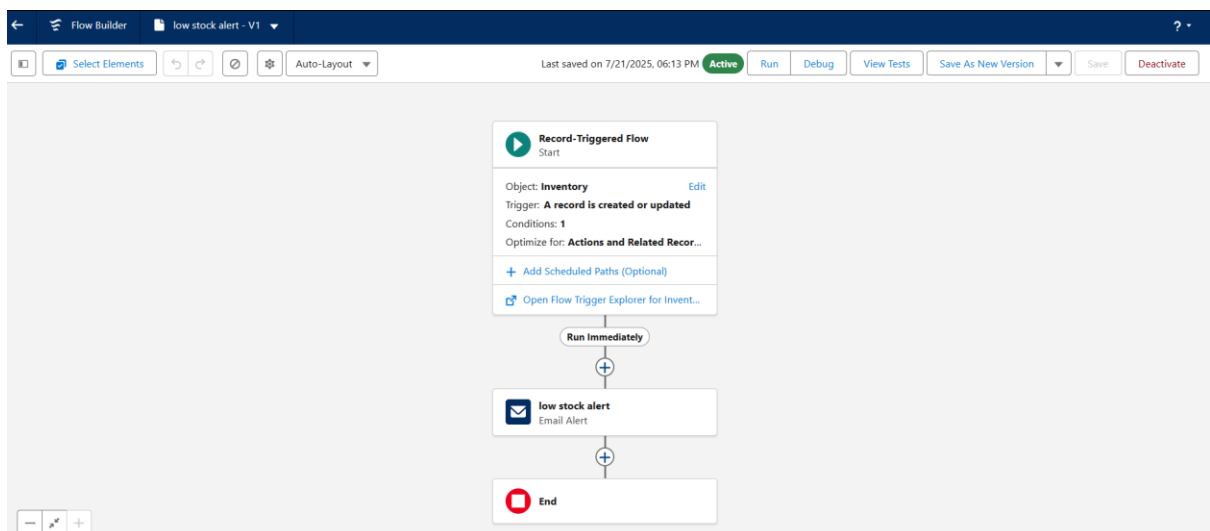
a. Order Confirmation Flow

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



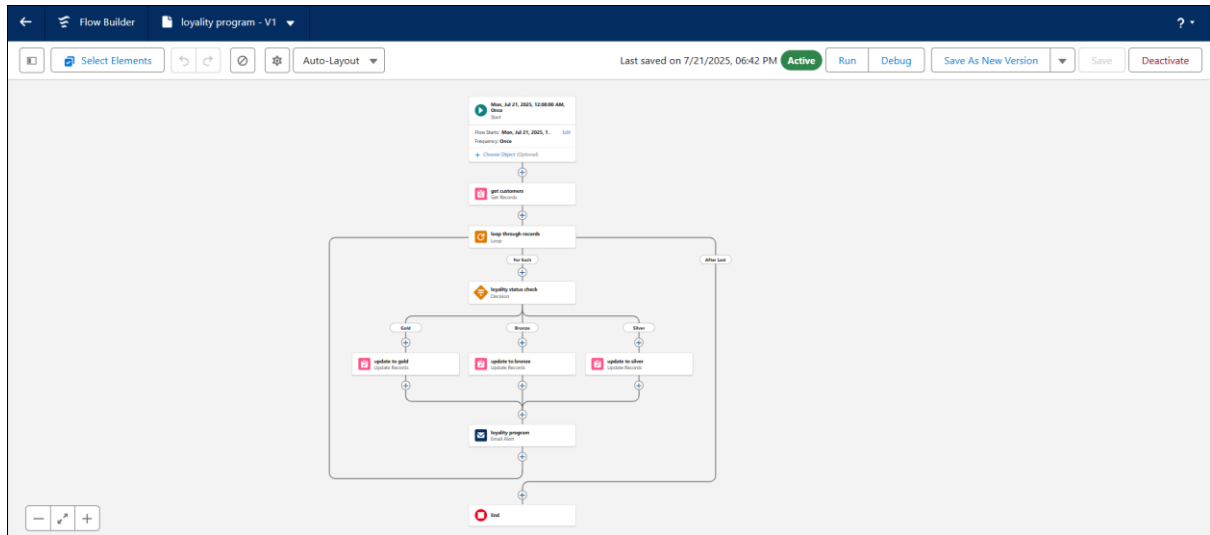
b. Stock Alert Flow

- 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

1. Customer Registration

- A customer, Sofia, 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

- Sofia 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

Apex Trigger on Inventory: Reduces shirt stock by 2.

Validation Rule: Ensures stock never goes below 0.

5. Loyalty Program

- Sofia 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, Sofia becomes a Silver member.

6. Email Notifications

- When a new order is placed or loyalty status is updated:
- **Flow + Email Alert** is triggered.
- Sofia 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)

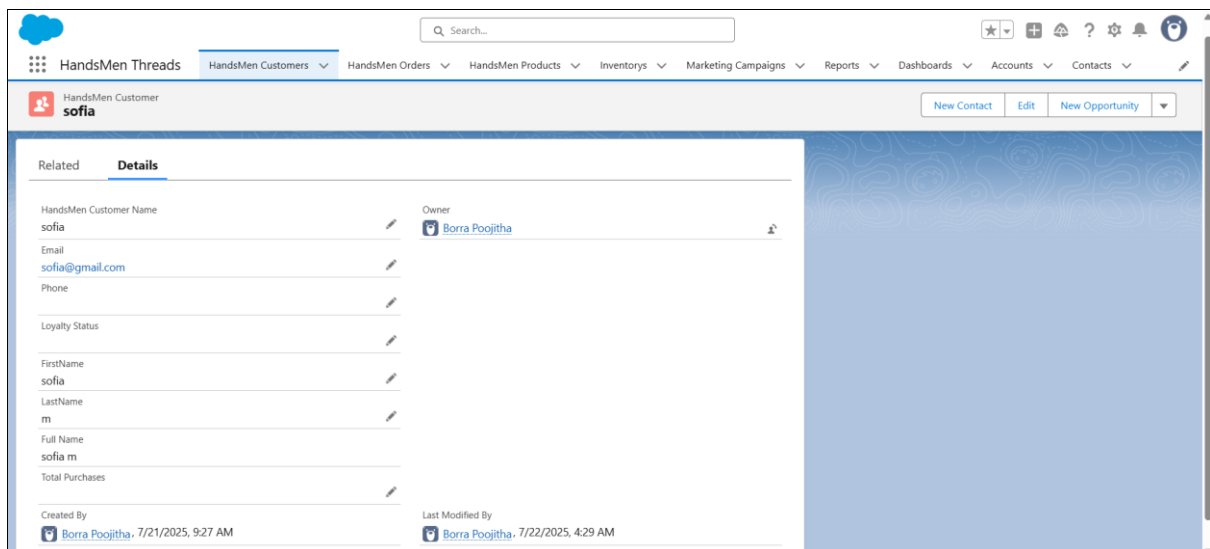


Fig: Customer Creation in HandsMen Threads

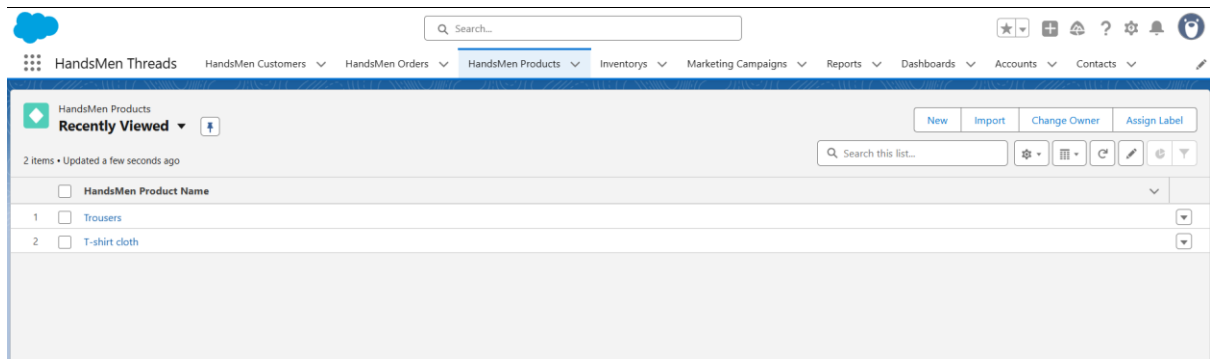


Fig: Products in HandsMen Threads

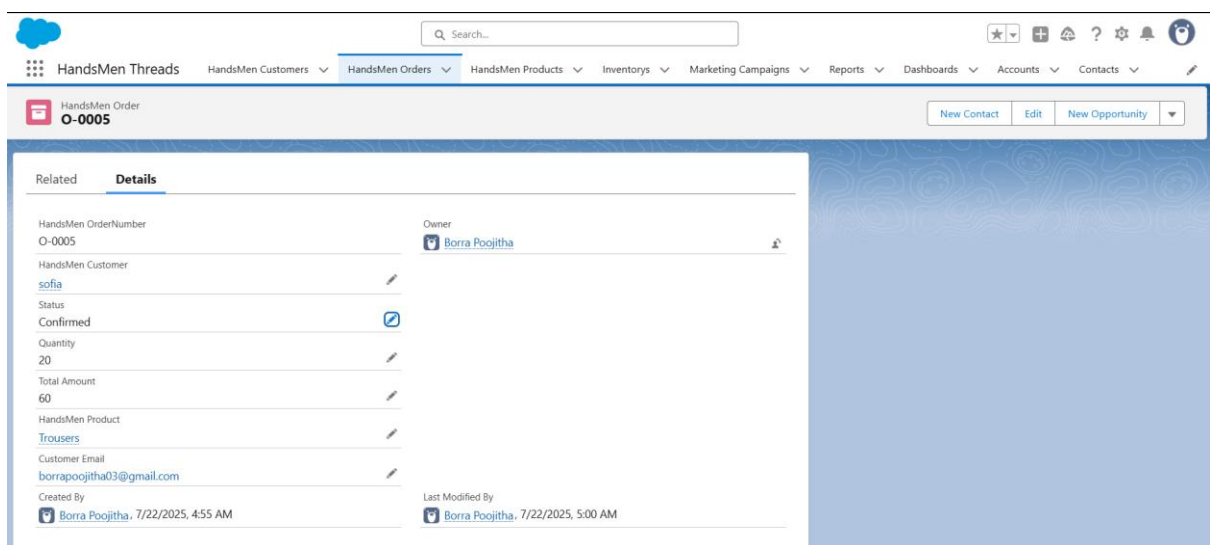


Fig: Order Confirmation

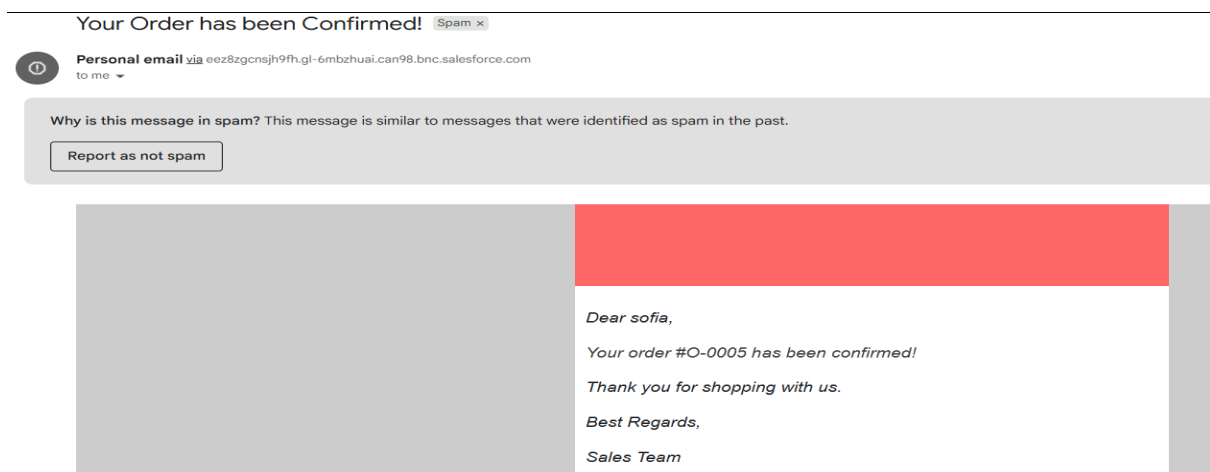


Fig: Order Confirmation Email

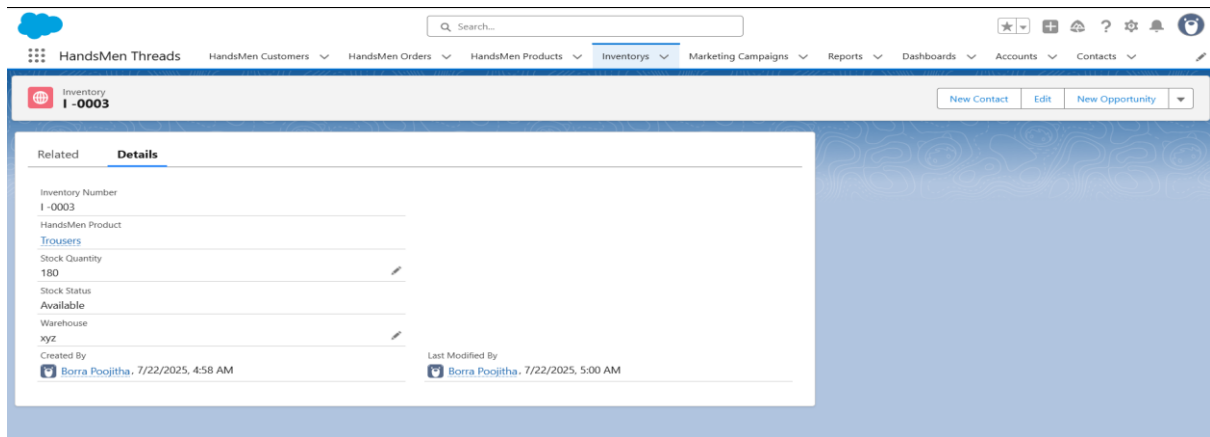


Fig: Inventory Creation

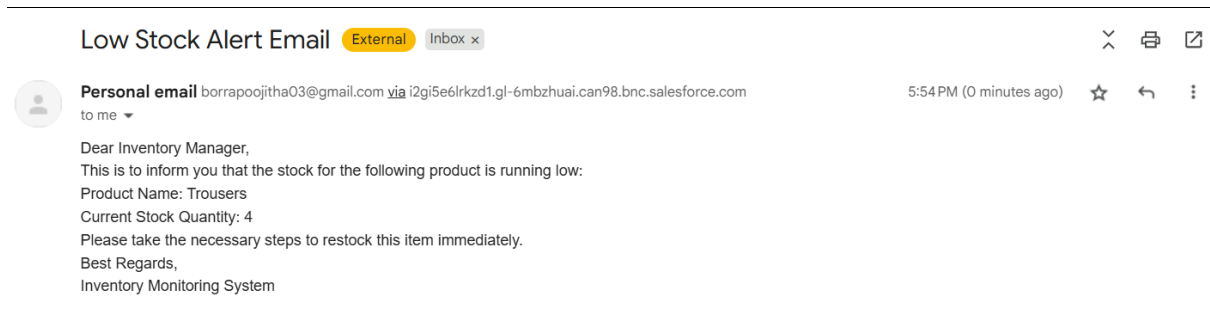


Fig: Low Stock Alert Email

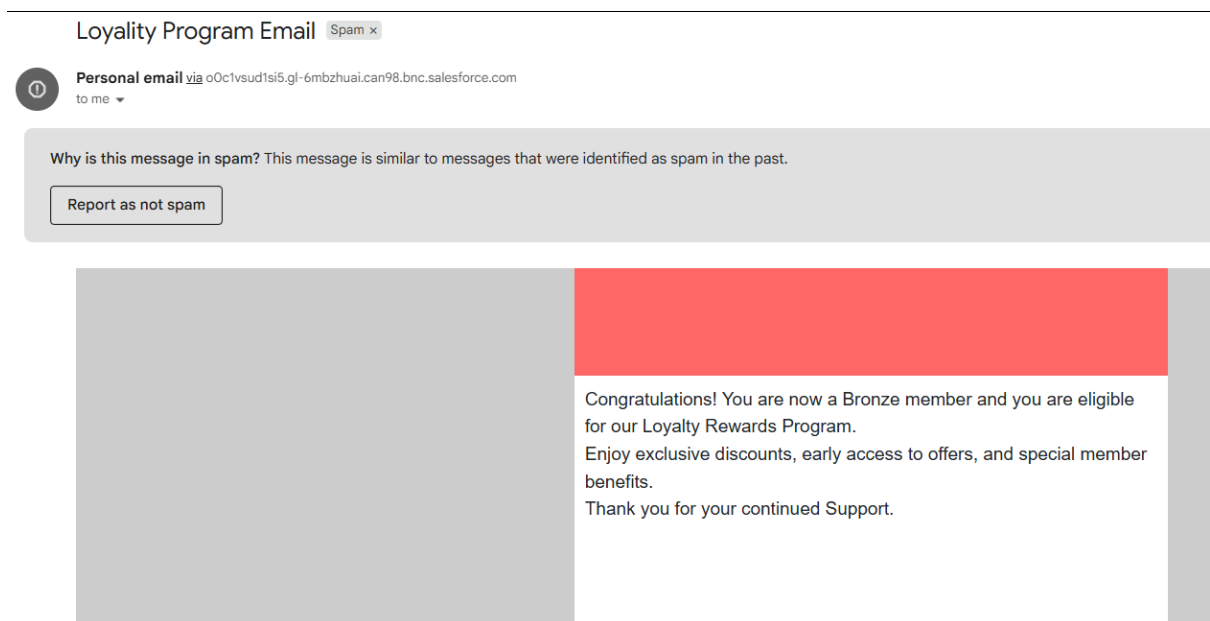


Fig: Loyalty Program Email

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

- Integrate WhatsApp or SMS services to send order updates, promotions, and reminders to customers.