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

ABSTRACT

This project is about building a custom Salesforce CRM system for *HandsMen Threads*, a high-end men's fashion and tailoring brand. The main goals were to make business operations smoother, connect better with customers, and keep data accurate across different teams.

We built a custom Salesforce CRM system for *HandsMen Threads*, a premium brand specializing in men's fashion and tailoring. The goal was to make business operations more efficient, improve how the brand connects with customers, and keep data accurate across different departments like Sales, Inventory, and Marketing.

The system includes five main custom objects: Customer, Order, Product, Inventory, and Marketing Campaign. We used automation tools such as Record-Triggered Flows, Scheduled Flows, Email Alerts, and Apex code to handle tasks like sending order confirmations, updating loyalty status, and alerting teams when stock is low. A scheduled Apex batch job also helps keep inventory levels updated automatically.

To protect data and make sure it's reliable, we added validation rules and set up role-based access so each team only sees what they need. This complete CRM setup helps deliver a better customer experience through personalized communication, improves daily operations with automation, and provides a strong foundation for future growth using the Salesforce platform.

OBJECTIVE

To implement a customized Salesforce CRM solution for *HandsMen Threads* that streamlines business operations, enhances customer engagement through personalized communication, and ensures accurate, secure data management across Sales, Inventory, and Marketing teams—laying a scalable foundation for future growth.

- **Centralized Customer Data**
  All customer interactions and profiles stored in one place for easy access and better service.

- **Inventory Integration**

  Real-time inventory updates linked to sales data for smarter stock management.

- **Targeted Marketing Campaigns**

  Personalized outreach based on customer behavior and preferences.

- **Enhanced Collaboration**

  Seamless communication between Sales, Inventory, and Marketing teams via shared dashboards and reports.

- **Scalability & Flexibility**

  A solution that grows with the business and adapts to evolving needs.

- **Data Security & Compliance**

  Built-in safeguards to protect sensitive customer and business information.

TECHNOLOGY DESCRIPTION

Salesforce Platform

Salesforce is the foundation of the *HandsMen Threads* application. It offers a powerful cloud-based system to manage the entire tailoring process—from client onboarding to order tracking and personalized styling—all within one centralized CRM.

Custom Objects

These are unique data structures designed specifically for *HandsMen Threads*:

- ClientProfile__c

  Stores client details like measurements, style preferences, and past orders.

- Order__c

  Tracks tailoring orders with fields for fabric choice, fitting dates, and order status.

Tabs

Tabs help users easily navigate the system. Custom tabs like Clients, Orders, and Styling Tips give tailors and support staff quick access to the data they use every day—saving time and clicks.

Custom App

The *HandsMen Threads* Custom App brings together all relevant objects, tabs, reports, dashboards, and automation tools. It creates a personalized workspace for tailoring, sales, and support teams that reflects the brand's style and workflow.

Access & Security Tools

- Profiles

  Control what data users can see and edit.

- Roles

  Define who can access records based on their position in the company.

- PermissionSets

  Provide extra access when needed, beyond what a user's profile allows.

- ValidationRules

  Ensure data accuracy. Example: Prevent submitting an order if Measurement_Confirmed__c = FALSE.

Email Tools

- Email Templates

  Standardize communication. Example: A welcome email is sent when a client registers.

- Email Alerts

  Triggered automatically. Examples:

- Notify clients when their order is "Ready for Pickup"

- Send fitting reminders 24 hours before the appointment

Automation Tools

- Flows

  Automate multi-step processes in the tailoring journey.

- Apex Code

  Adds advanced logic where needed. Examples:

- Triggers calculate delivery dates based on fabric stock and tailor availability

- Batch jobs send weekly styling tips based on client preferences and seasonal fashion

Apex triggers calculate delivery dates dynamically based on fabric availability and tailor workload.

DETAILED EXECUTION OF PROJECT PHASE

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.
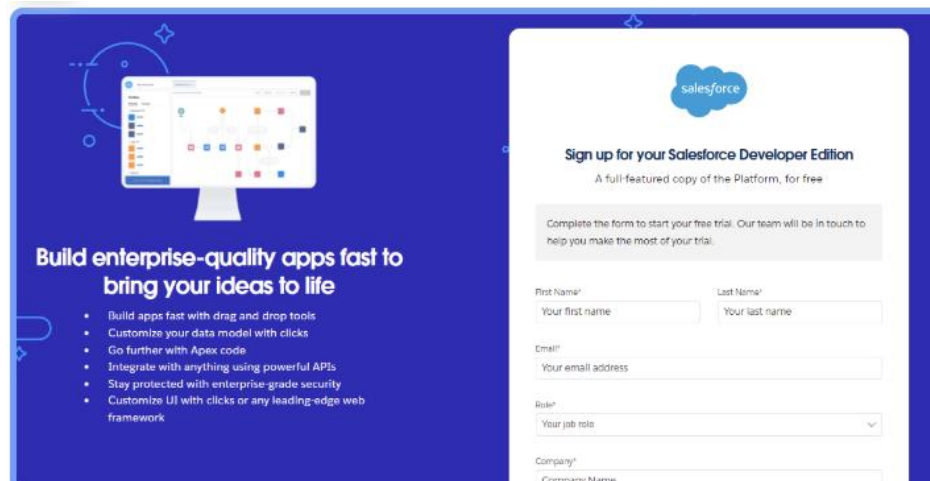
2. Custom Object Creation

To support key operations, five tailored custom objects were developed:

- **Handsmen Customer**

  Captures essential client details such as contact information, loyalty tier, and engagement history.

- **Handsmen Product**

  Maintains the product catalog, including item codes (SKUs), pricing, and availability.

- **Handsmen Order**

  Logs customer purchases, detailing item quantities, order status, and inventory impact.

- **Inventory**
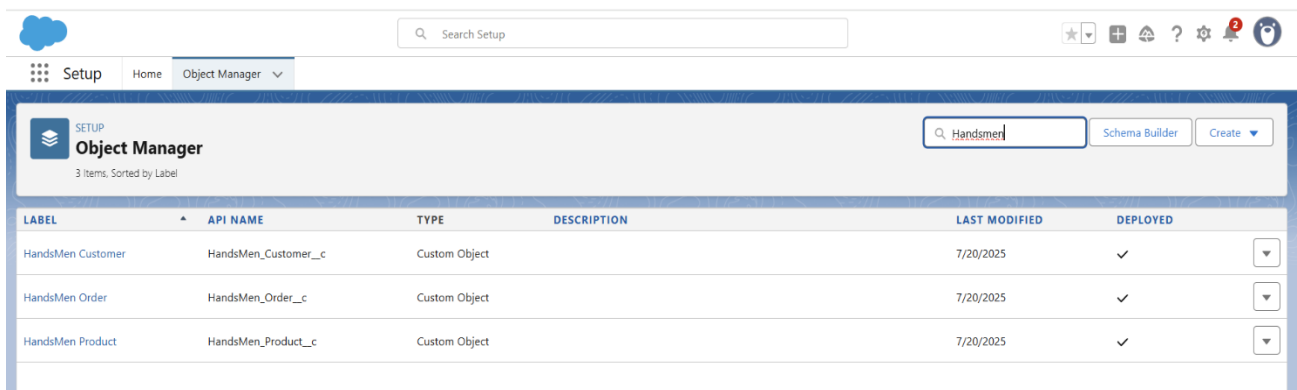
  Monitors stock levels and tracks storage locations across warehouses.

- **Marketing Campaign**

  Organizes promotional efforts, including campaign content, timelines, and target audiences.

Steps followed:

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

3.Creating the Lightning App

- A dedicated **Lightning App** named *HandsMen Threads* was built to streamline operations and provide a unified workspace.
- The app features key navigation tabs such as:

  Handsmen Customer, **Order**, **Product**, **Inventory**, **Campaign**, **Reports**, and more—giving users quick access to essential data and tools.

- The app is currently assigned to users with the **System Administrator** profile, ensuring full access for configuration and management.

4. Validation Rules

To ensure accurate data 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:** Validation 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 I 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:

7.Email Template & Alerts

Created three email templates:

- Order Confirmation – Sent an order status = confirmed
- Low Stock Alert – Sent when Inventory < 5 units

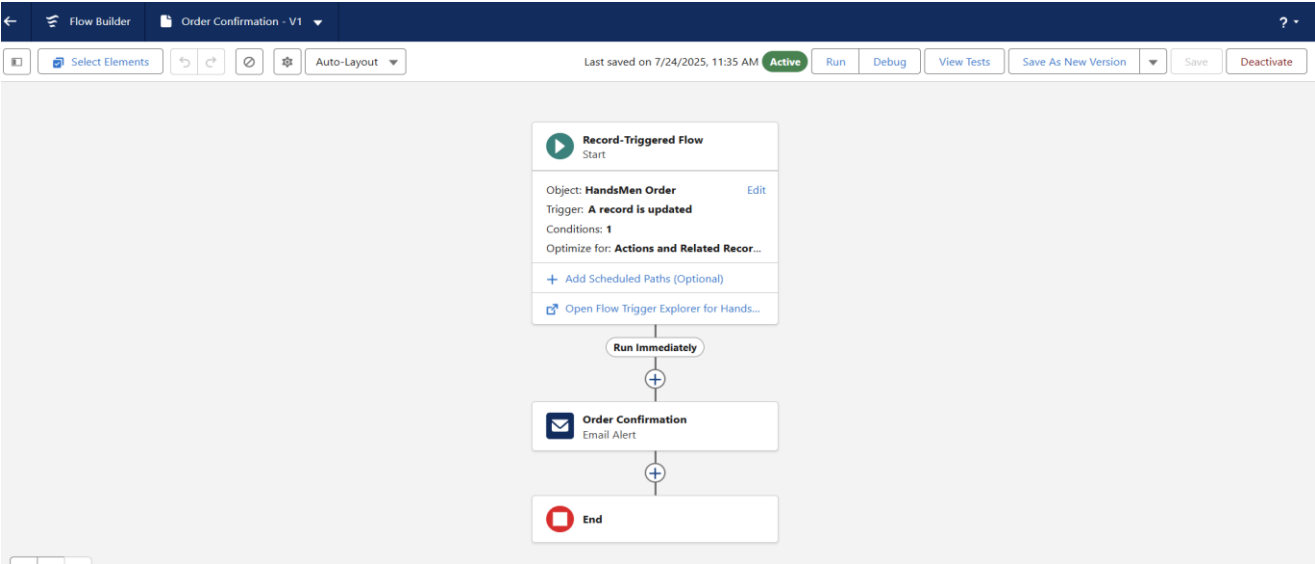Loyality Program Email – Sent when loyality status changes

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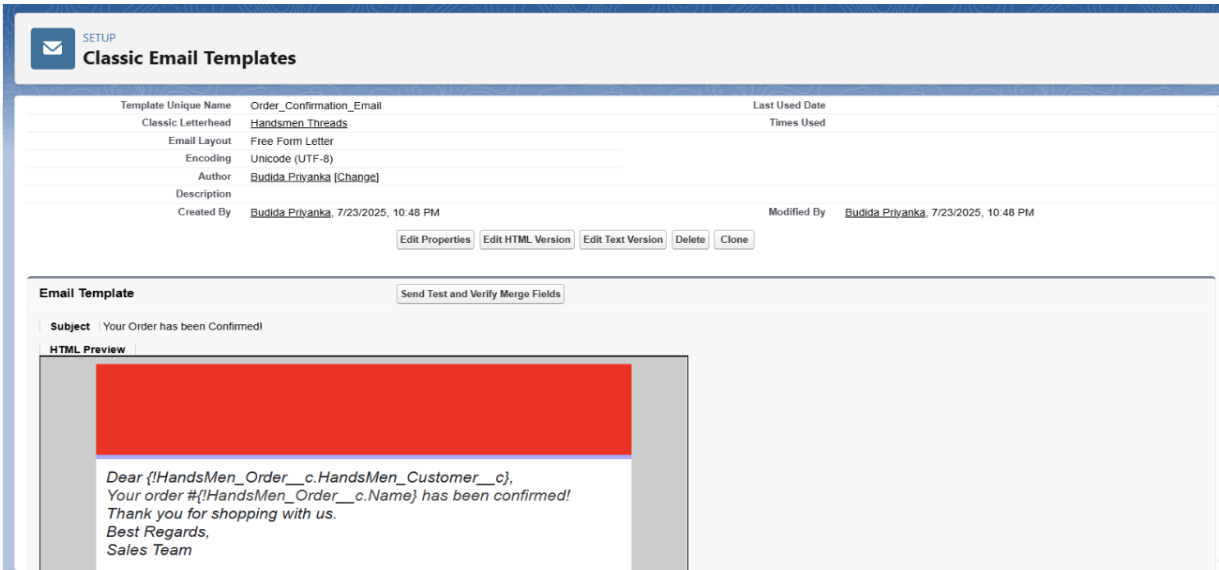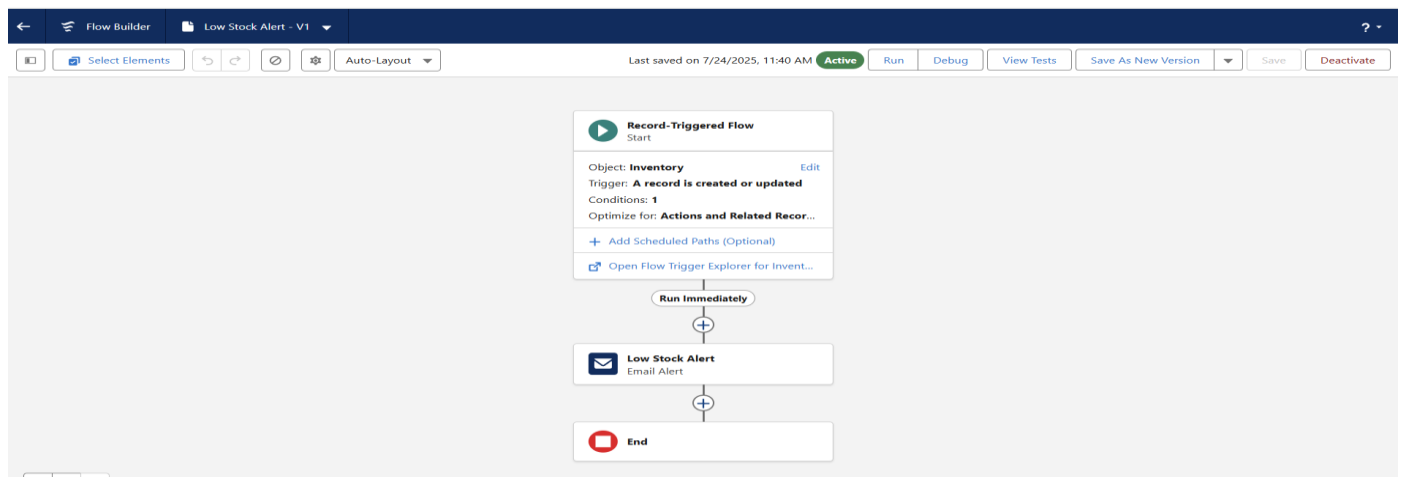

8.Flow Implementation

A. Order Confirmation Flow

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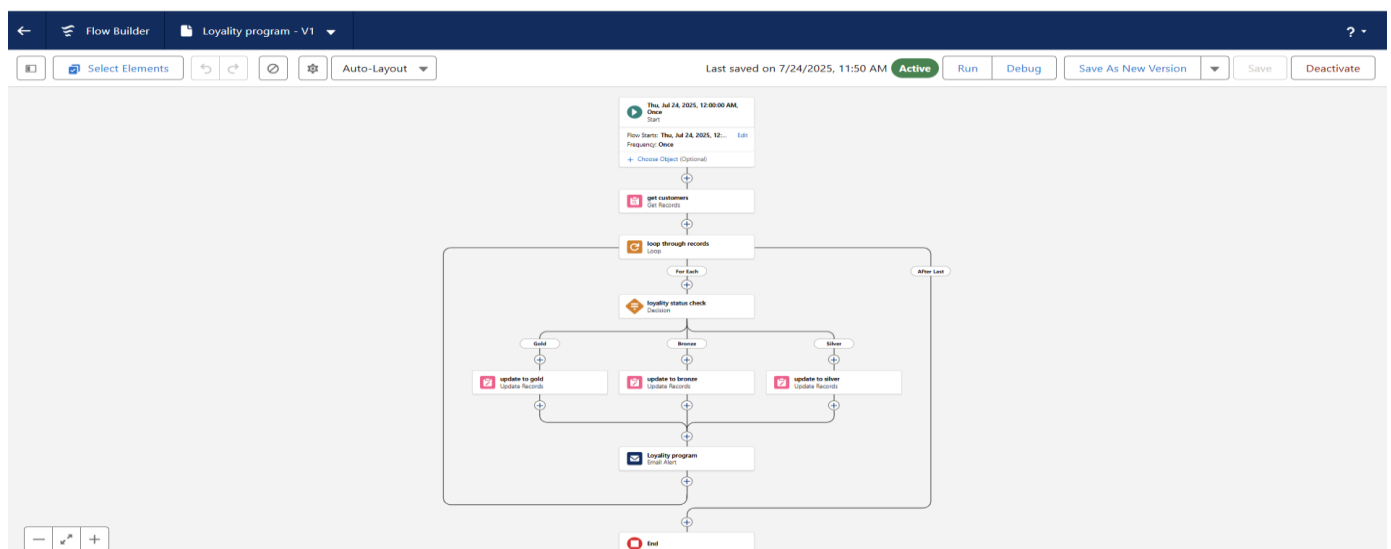- Sends an order confirmation email to the related customer.

B. Stock Alert Flow

- Triggered when Inventory stock drops below 5
- Send slow 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 2500). 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 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:

   2500 Bronze

   ₹500-21000- 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:

- **Rajesh Mikaelson** - Sales Role (Platform 1 Profile)
- **Kol Mikaelson** - Inventory Role (Platform 1 Profile)
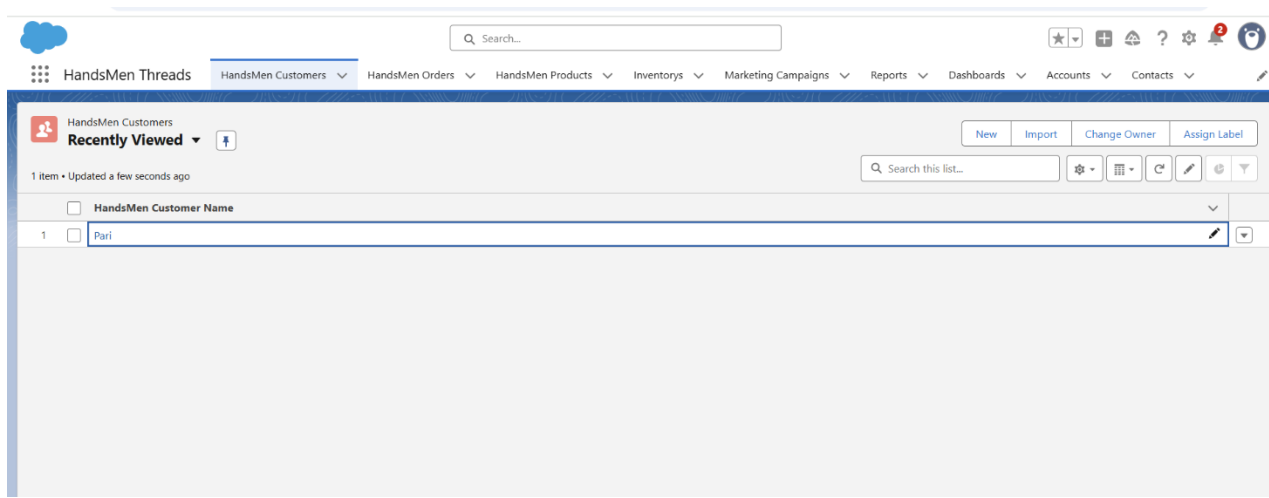
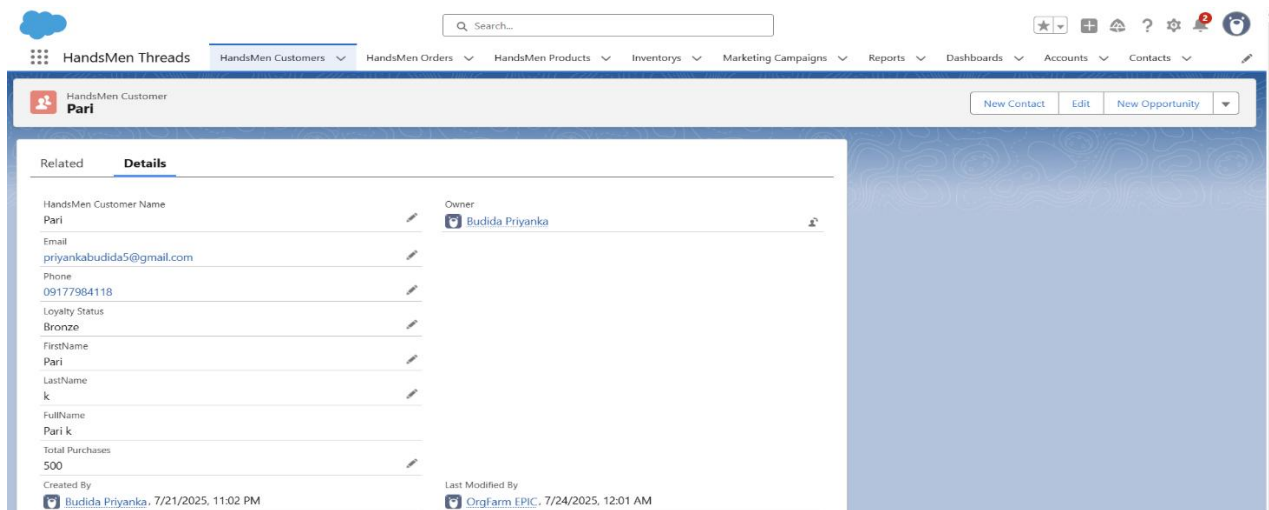# <u>SCREENSHOTS</u>

Fig: Custom App for HandsMen Threads

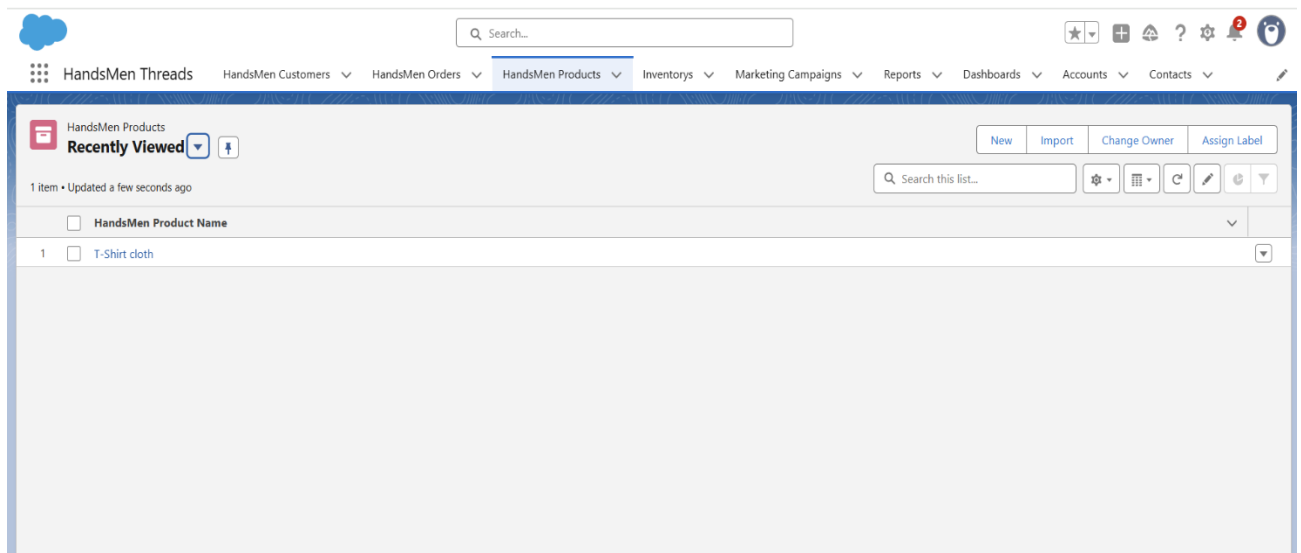**Fig: Customer Creation In HandsMen Threads**

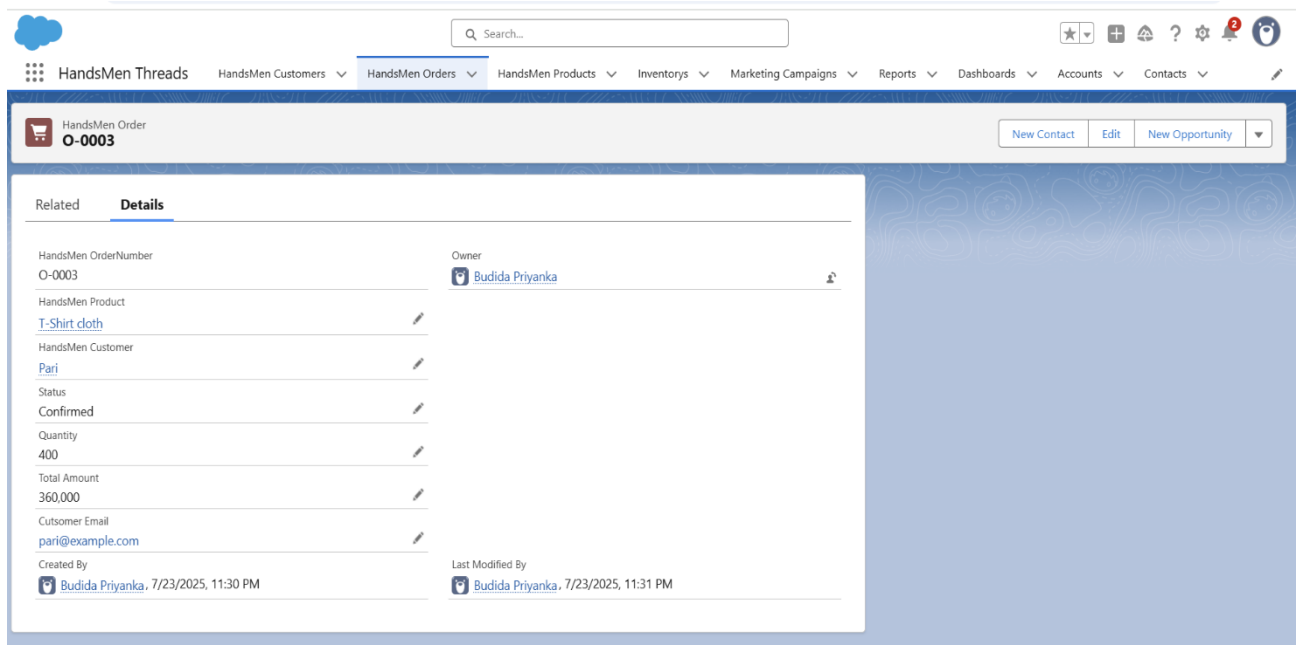**Fig: Products In HandsMen Thread**

Fig: Order Confirmation

CONCLUSION

The **HandsMen Threads CRM system**, developed on the Salesforce platform, streamlines key business functions including customer relationship management, product catalog management, order processing, inventory tracking, and loyalty program automation. Leveraging powerful Salesforce tools such as **Custom Objects**, **Flows**, **Validation Rules**, **Email Alerts**, and **Apex**, the system ensures accurate data management, real-time updates, and delivers an elevated, seamless customer experience.

Future Scope:-

- **Customer Community Portal Integration**

  Implement a dedicated customer portal that enables users to securely log in, access their order history, and monitor loyalty point balances.

- **Mobile Application using Salesforce Mobile SDK**

  Equip store associates with a mobile app—powered by the Salesforce Mobile SDK—to efficiently manage inventory and process orders on the go.

- **Dynamic Reports and Interactive Dashboards**

  Create visually engaging dashboards and in-depth reports that provide real-time insights into sales performance and inventory trends for strategic decision-making.

- **AI-Powered Product Recommendations (Salesforce Einstein)**

  Utilize Salesforce Einstein's AI capabilities to deliver personalized product recommendations tailored to individual customer behaviors and preferences.

- **WhatsApp and SMS Integration for Notifications**

  Integrate messaging platforms to automatically send order confirmations and loyalty program updates to customers through WhatsApp or SMS.