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

ABSTRACT

This project presents the implementations of a customized Salesforce CRM solution for HandsMen Threads, a fictional men's fashion brand focused on delivering a refined and seamless customer experience.

The project focused on building a smarter, more organized way to manage customers. Designed and developed a CRM system that could handle customer profiles, product inventory, order tracking, and a loyalty program. Using Salesforce tools like custom objects, Flows, and Apex triggers, created features such as automated order confirmations, loyalty point tracking, and stock alerts. Also added email notifications and batch processes to make the system feel more complete and business-ready.

Throughout the project, best practices in Salesforce development were applied—from data modeling and validation rules to testing and deployment. This experience provided valuable exposure to real-world use cases, allowing the application of both technical and analytical skills in building a functional, user-centric CRM solution. The project not only demonstrated the capabilities of the Salesforce platform but also highlighted its potential to enhance operational workflows in the fashion retail sector.

OBJECTIVE

The main goal of this project is to create a functional and user-friendly Salesforce CRM solution for *HandsMen Threads*, a conceptual men's fashion brand. The project aims to improve customer management, order tracking, and loyalty programs through custom objects, automation, and Apex development. It also seeks to apply real-world Salesforce skills while delivering a system that mirrors the needs of a modern retail business.

Specifically, the project aims to:

- Design and implement a CRM system tailored to men's fashion retail operations.
- Automate business processes such as order confirmations, loyalty tracking, and inventory alerts.
- Utilize Salesforce tools like Flows, Apex triggers, and batch jobs effectively.
- Apply proper data modeling, validation rules, and user communication features.
- Gain hands-on experience in end-to-end Salesforce development—from planning to deployment.
- Demonstrate the practical value of Salesforce in streamlining retail business workflows.

TECHNOLOGY DESCRIPTION

Salesforce:

Salesforce is a cloud-based software company best known for its Customer Relationship Management (CRM) platform. It provides tools and services that help businesses manage their relationships and interactions with customers, streamline sales, marketing, customer service, and other operations.

Custom Objects:

Objects allow you to expand Salesforce beyond the standard objects like Accounts, Contacts, and Leads by creating your own objects tailored for your business processes.

Example:

- Property_c - Stores property info
- Product_c – Stores product details
- Customer_c – Stores customer info

Tabs:

Tabs in Salesforce are user interface elements that provide easy access to objects and their records.

Example: A tab for Property_c allows users to easily view and manage the property details.

Custom App:

A collection of tabs, objects, and functionalities bundled together for a specific business purpose or department.

Profiles:

A Profile in Salesforce defines what a user can see and do within the platform. It’s like a permission set that controls access to field and more.

Roles:

In Salesforce controls what records a user can see, based on record-level access — especially in hierarchical data (like sales teams).

Permissions Sets:

A collection of settings and permissions that grant users access to additional features or objects, without changing their Profile.

Validation Rules:

A Validation Rule in Salesforce is a formula that checks whether data entered into a record meets certain conditions.

Example:

- Email must contain "@“
- Require phone number if Contact type is "Customer"

Email Templates:

A pre-designed messages you can use to send consistent and personalized emails to leads, contacts, users, or custom object records.

Example:

- Sending a welcome email

Email Alerts:

An Email Alert is an automation action that sends an email using a pre-defined template to specified recipients when certain conditions are met. It's used in workflow rules, process builder, or flows.

Example:

- Send an Email Alert When Email Is Not Gmail

Flows:

An automation tool that lets you build logic visually to collect data, make decisions, and perform actions (like creating records, sending emails, or updating fields).

Example:

- Flow triggers email alerts on new order

Apex:

Apex is a strongly typed, object-oriented programming language developed by Salesforce. It allows developers to write custom business logic that runs on the Salesforce platform, similar to Java or C# in syntax.

Example Triggers:

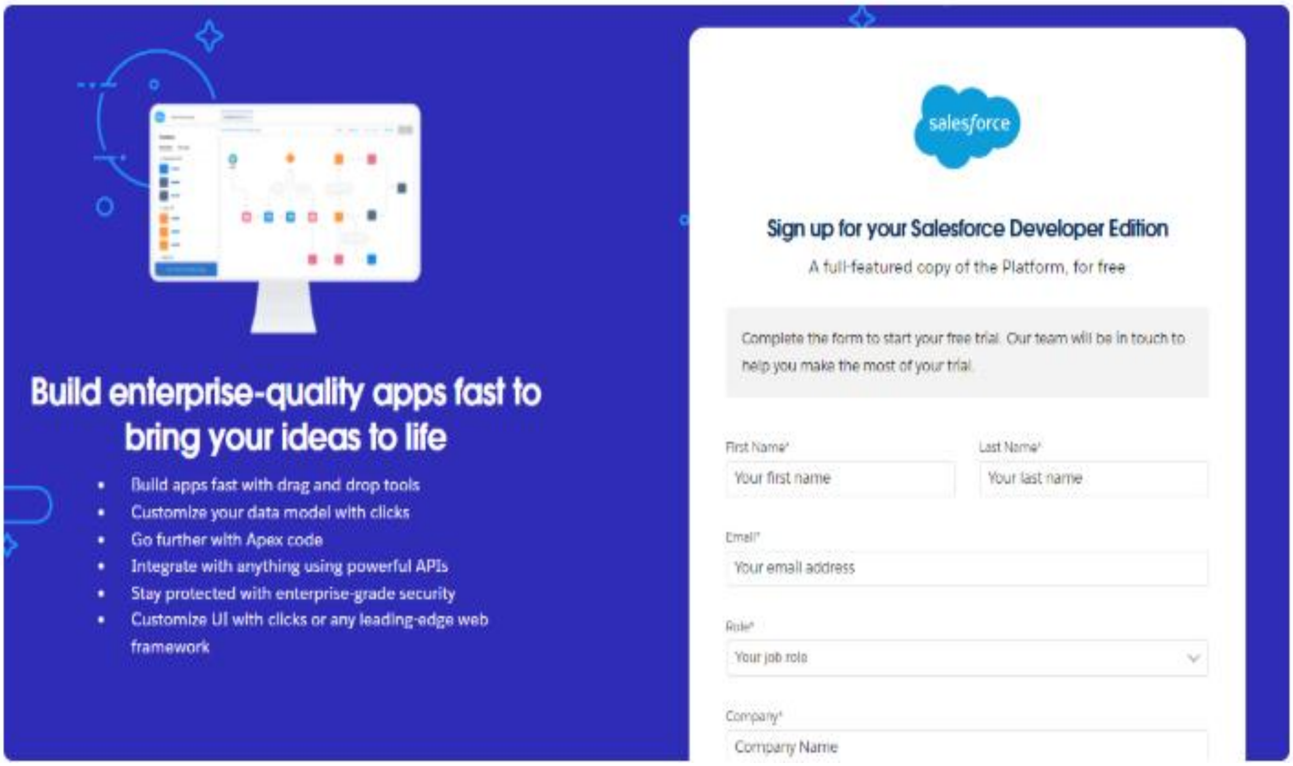
- Trigger on Account – Auto-Create Contact
- Trigger on Contact – Prevent Non-Gmail Emails

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.



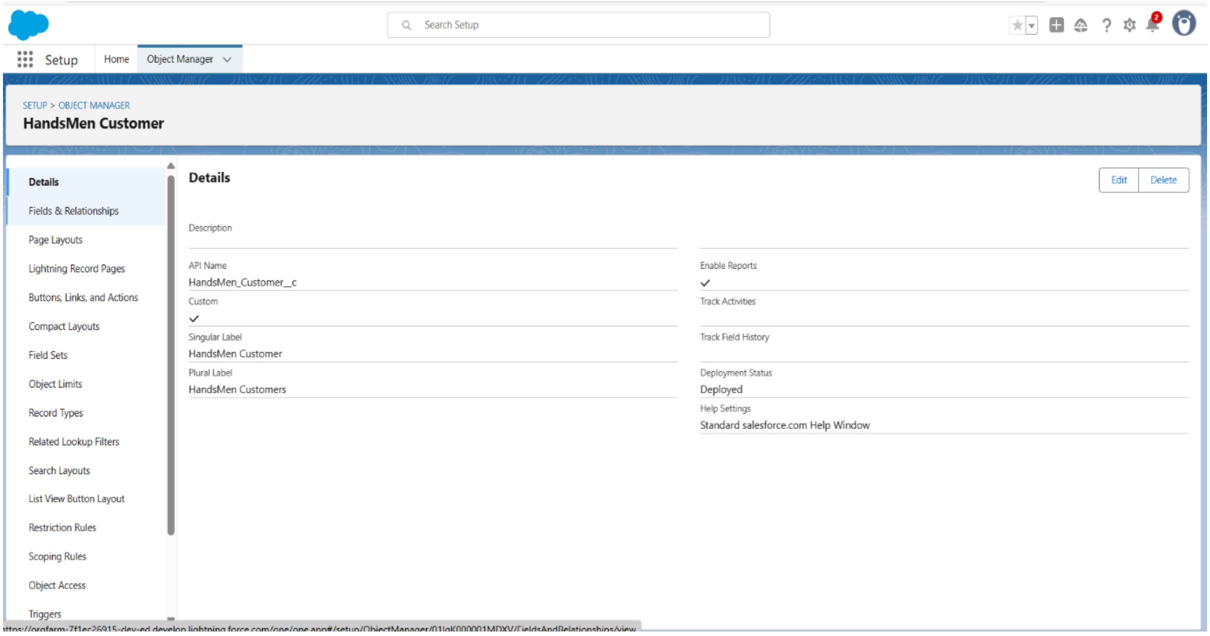
2. Custom Object Creation

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



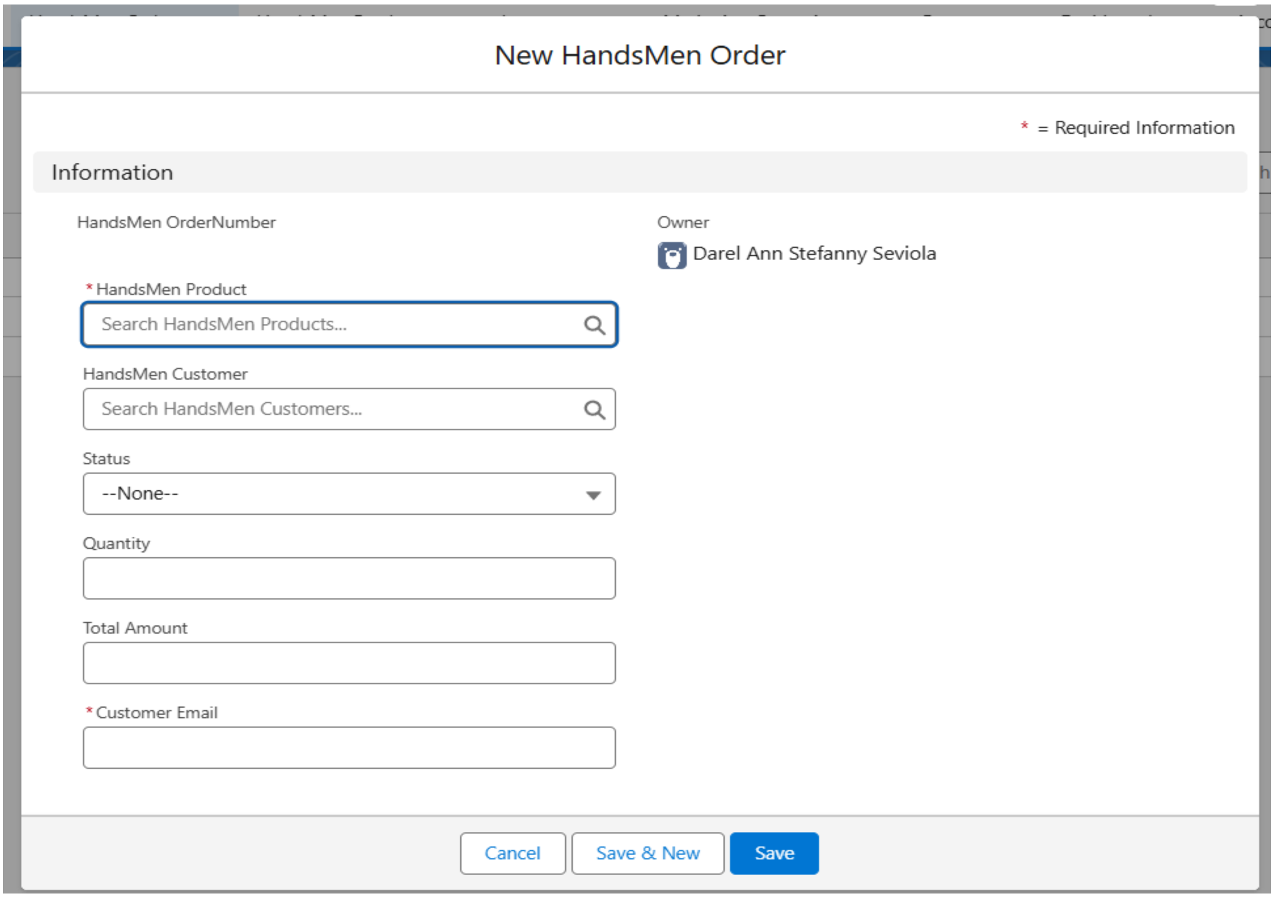
3. Creating the Lightning App

- 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:** Prevent saving if Total_Amount_c <=0.
- **Customer Object:** Validates email contains @gmail.com.

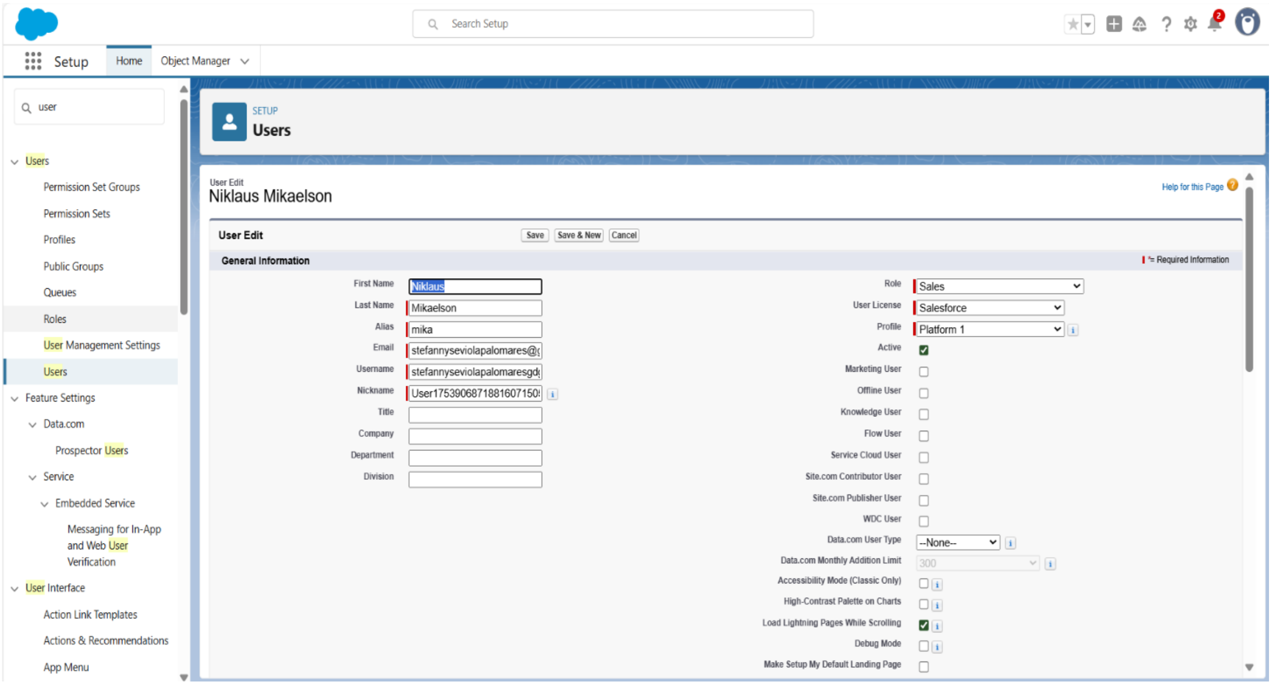


5. **User Role & Profile Setup**
    - Cloned the Standard User Profile to a new profile named Platform 1 and added access to necessary custom objects.
    - Created roles for the different departments:
        - Sales Manager, Inventory Manager, Marketing Team

6. **User Creation**

   User were created in Salesforce and assigned appropriate rules 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.

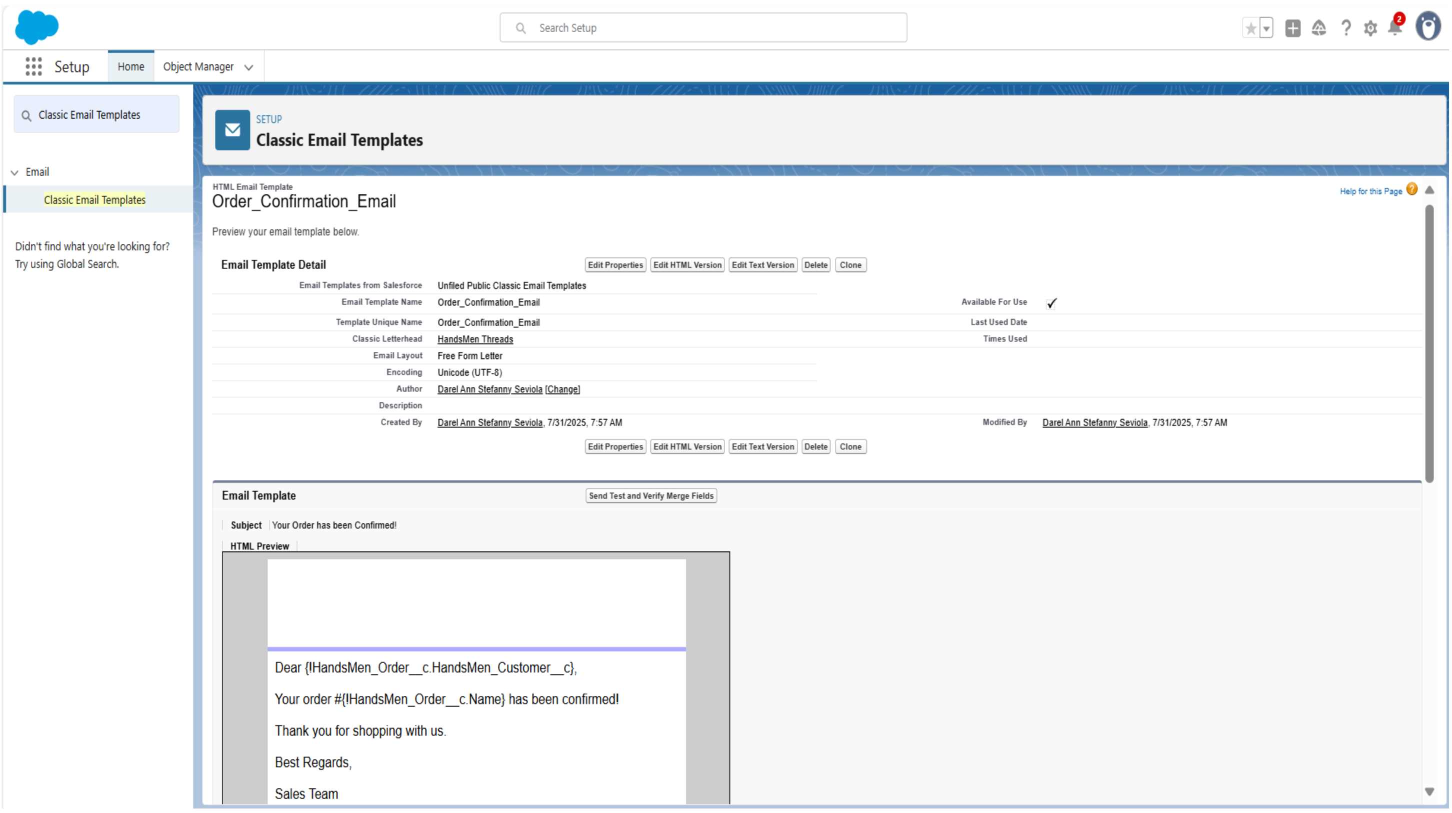


7. Email Template & Alerts

Created three email templates:

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

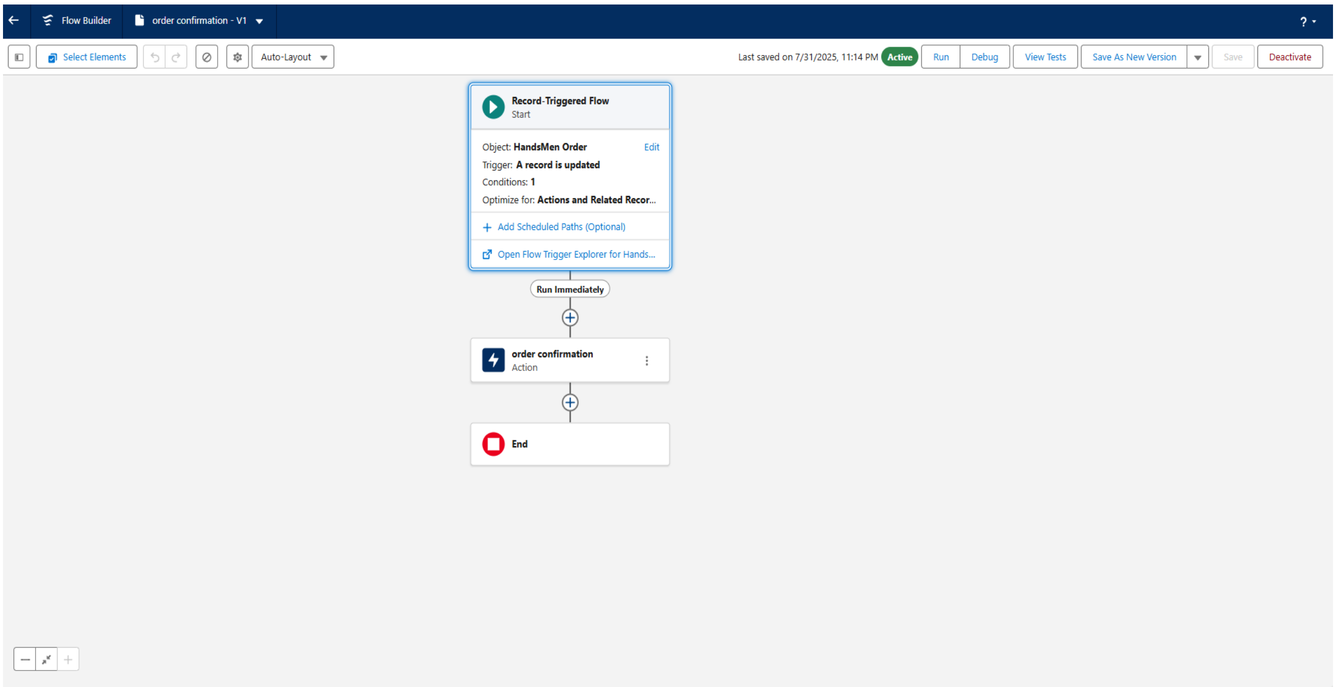
Corresponding Email Alerts were created using these templates and linked to automation flows.



8. Flow Implementation

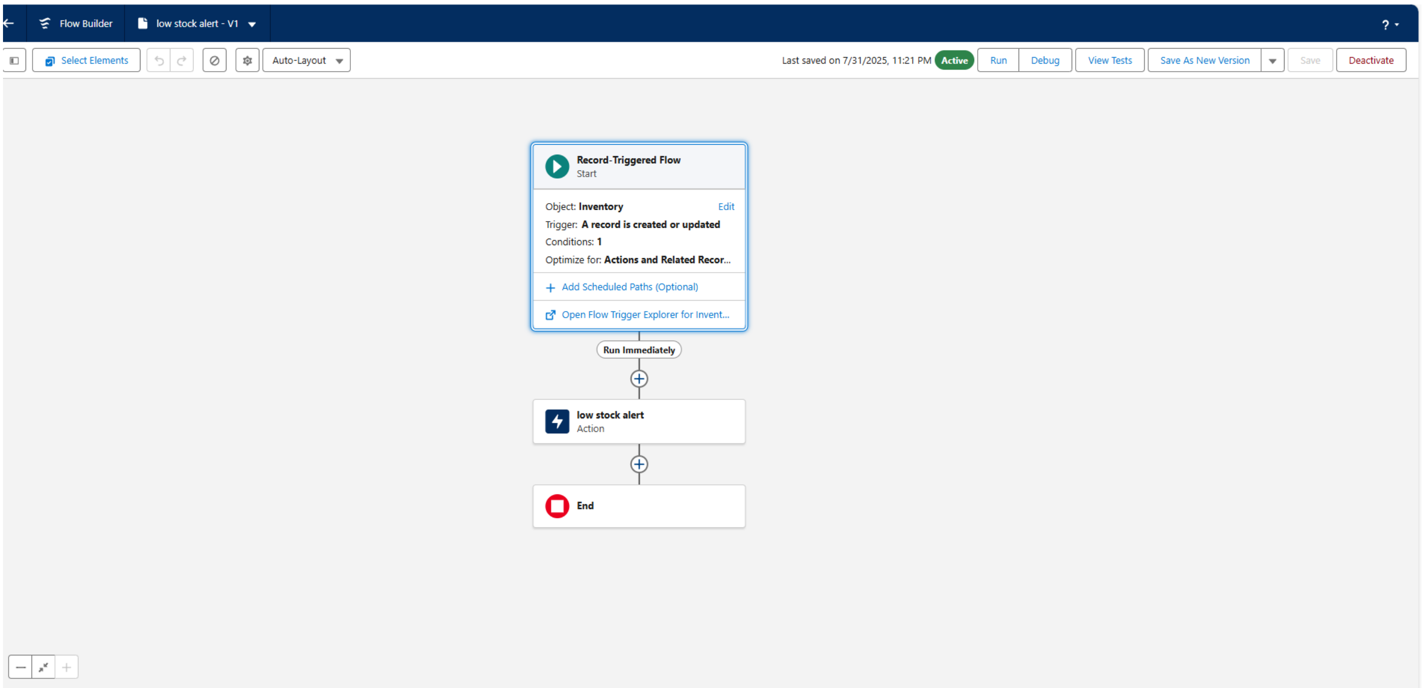
a. Order Confirmation Flow

- Triggered when an order is updated to confirmed.
- Sends an Order Confirmation email to the Related customer.



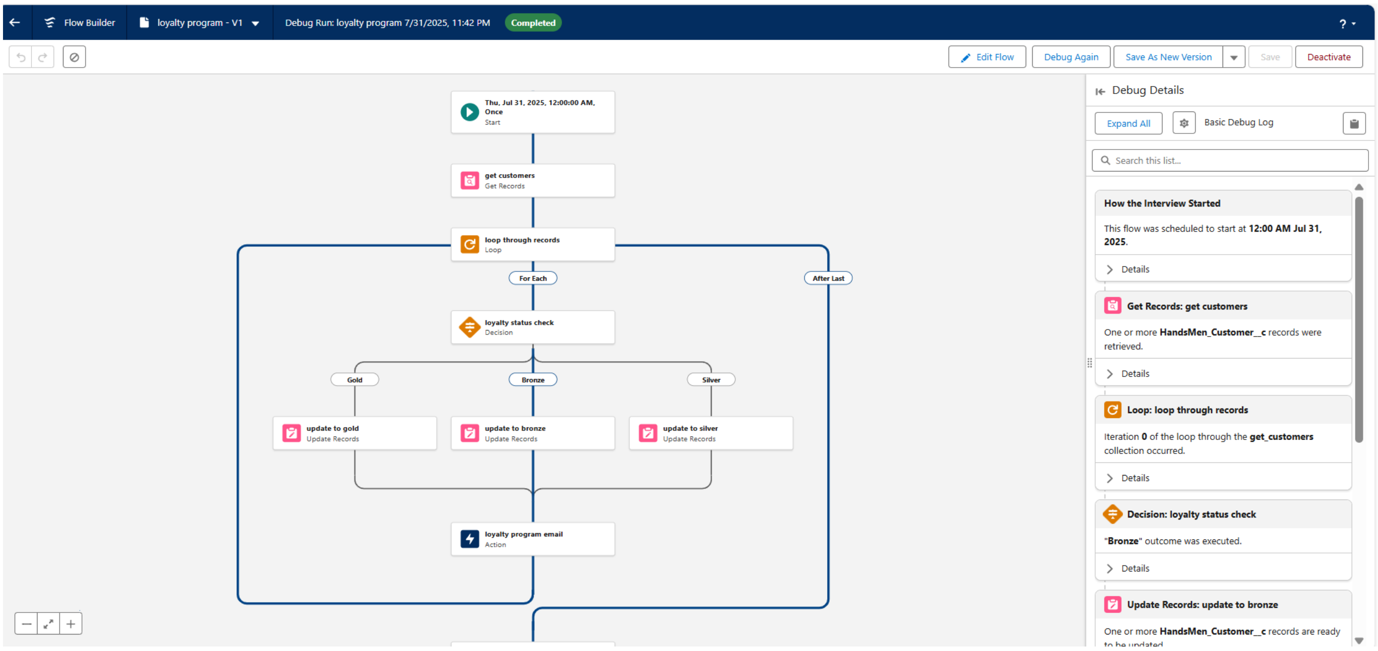
b. Stock Alert Flow

- Triggered when inventory stock drops below 5.
- 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 a total purchases.



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

1. Customer Registration

- A customer, Raniel Mikaelson, visits the store.
- 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 add 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**

- Raniel decides to buy 2 shirts (each $500). An order is placed.
- In Salesforce: A new order record is created.
- Apex Trigger: Automatically calculates Total_Amount_c = 2 x 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**

- Raniel 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, Raniel becomes a Silver Member.

6. Email Notification

- When a new order is placed or loyalty status is updated.
- Flow + Email Alert is triggered.
- Raniel 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

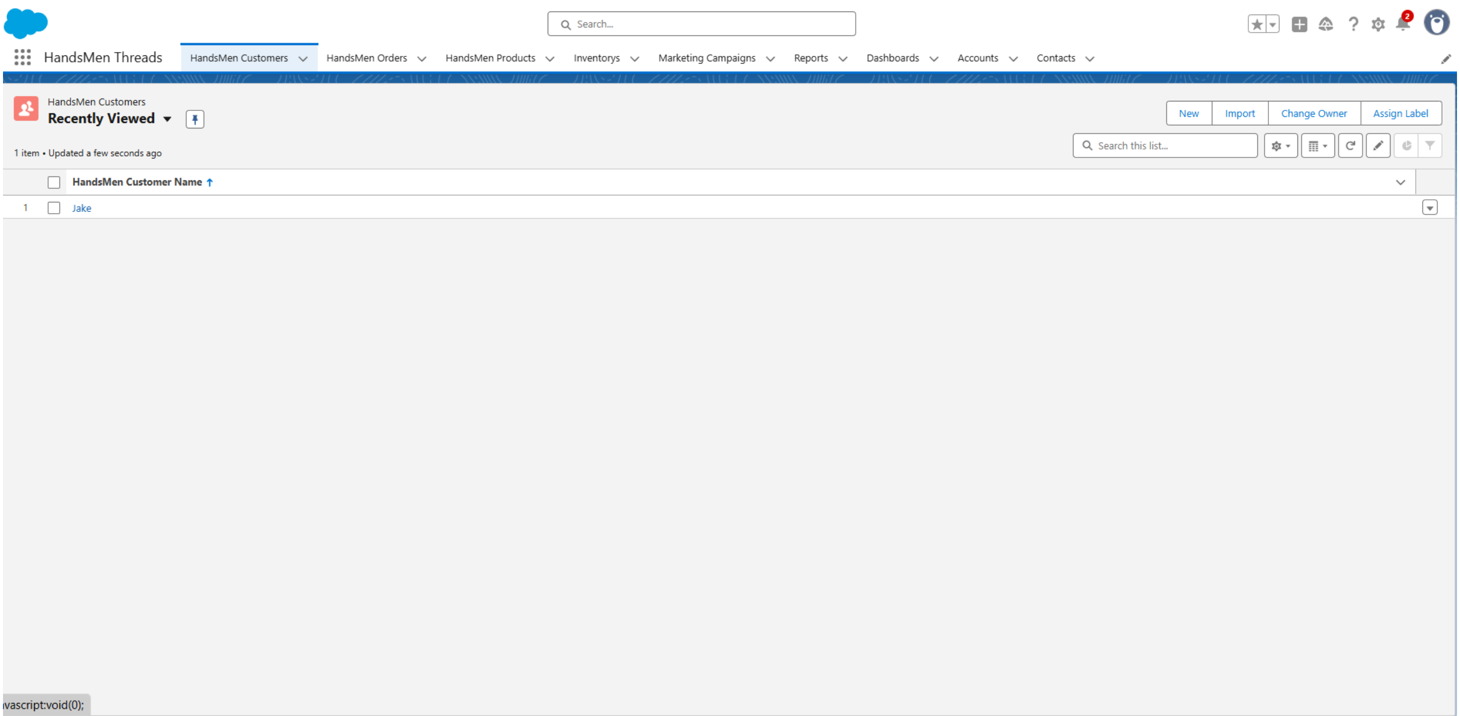


Fig: Custom App for HandsMen Threads

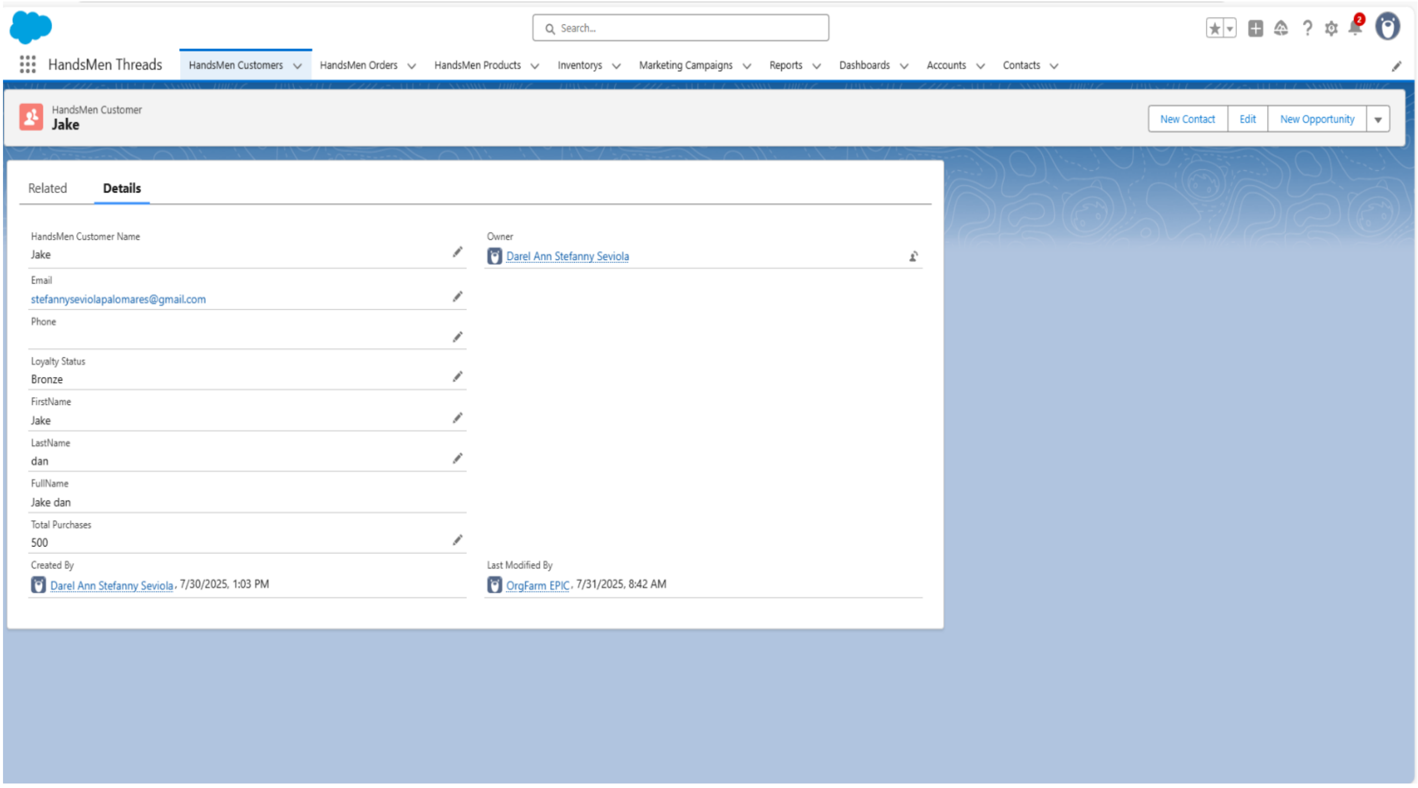


Fig: Customer Creation in HandsMen Threads

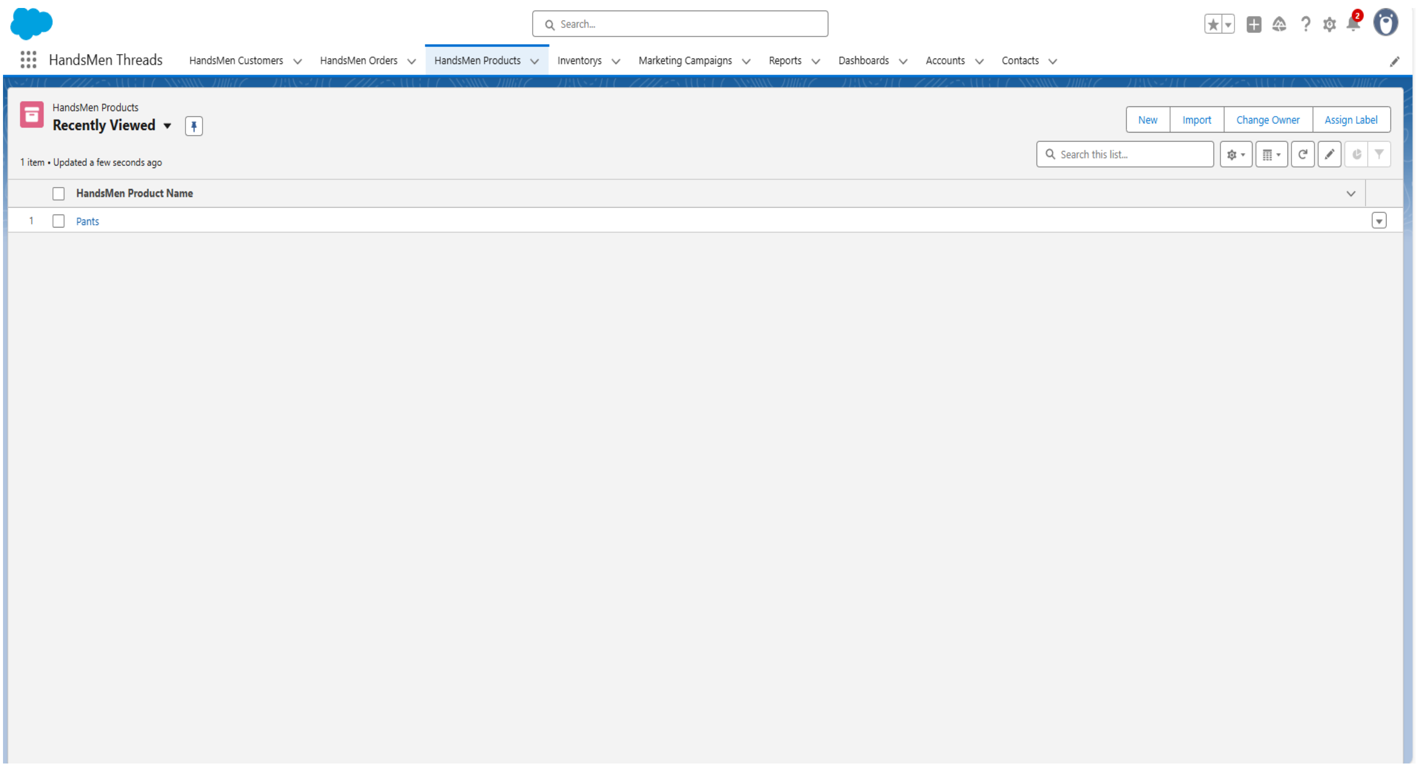


Fig: Products in HandsMen Threads

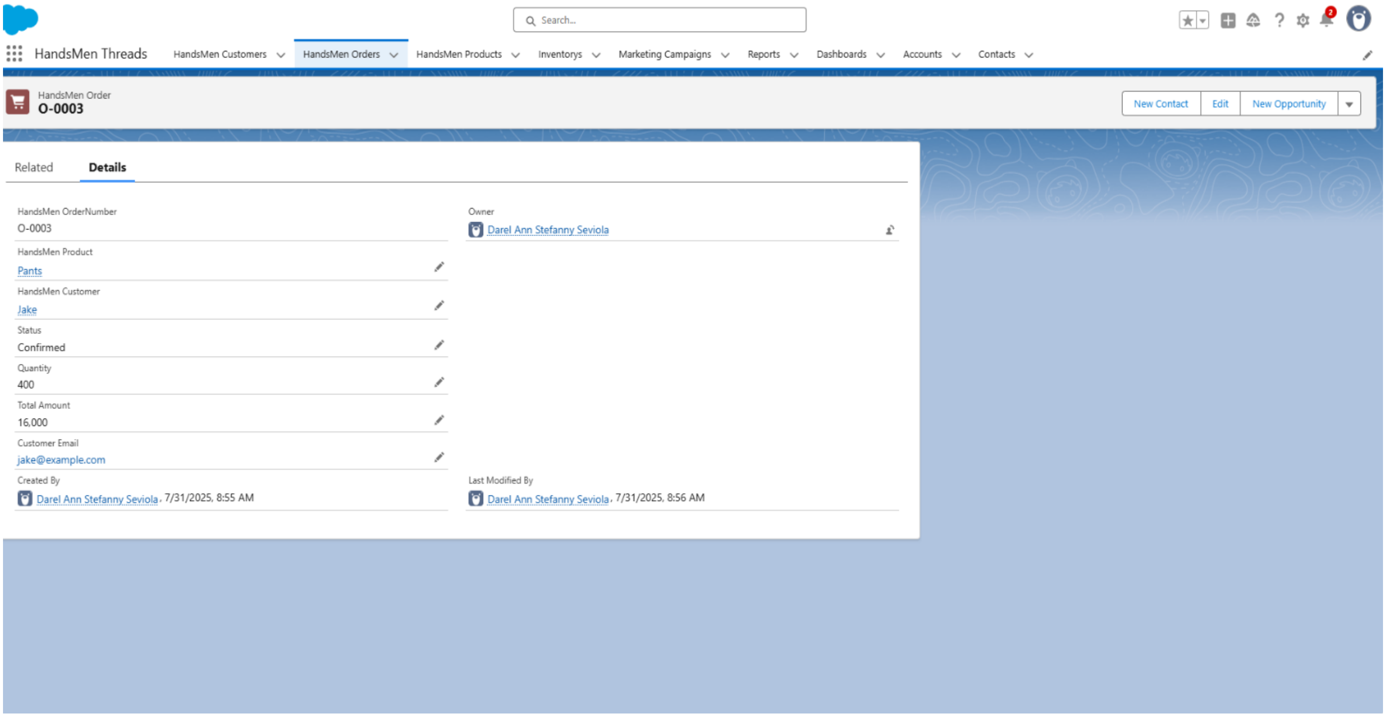


Fig: Order Confirmation

CONCLUSION

The HandsMen Threads marks a meaningful step in applying technical skills to a real-world business scenario. Through the Salesforce platform, we designed and built a streamlined system to manage products, orders, inventory, and customer engagement—bringing efficiency and professionalism to a modern men's fashion brand. This project not only enhanced my knowledge of custom objects, flows, Apex triggers, and automation strategies, but also gave me a deeper appreciation for how technology can support creativity and customer service. More than just a system, HandsMen Threads reflects the art of combining thoughtful design with technical precision to elevate the fashion experience. This journey has strengthened my problem-solving skills and prepared me for future roles in the tech industry with confidence and clarity.

In the future, HandsMen Threads could integrate with external e-commerce platforms, add customer portals for online ordering, or even use AI-driven recommendations for product suggestions. Advanced reporting and analytics could help management make data-informed decisions, while mobile accessibility can further improve user experience. These potential improvements make the project scalable and adaptable to the real-world growth of fashion businesses, showing that even a student-built system can evolve into a powerful digital solution.