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

Abstract

This project focuses on the development and deployment of a customized Salesforce CRM system for *HandsMen Threads*, a dynamic fashion brand. The objective was to enhance customer engagement, ensure seamless data flow, and automate key business processes. Core features include real-time order notifications, loyalty tracking, stock level alerts, and automated financial updates — all built with a strong emphasis on data integrity and operational efficiency.

A key aspect of this project is the maintenance of data integrity directly from the user interface (UI). This feature will safeguard the accuracy and consistency of the data, which is crucial for informed decision-making and reliable business operations.

Introduction

HandsMen Threads operates in a fast-paced, customer-driven market. To sustain growth and competitiveness, the company required a centralized system for managing customer data, sales, inventory, and communication. Salesforce CRM was chosen for its flexibility, scalability, and industry-grade features. We used multiple features that salesforce has to offer like, standard objects like reports, dashboards and some of the custom objects, validation rules, triggered flows, scheduled flows, email alerts, email templates and many more features that salesforce has to offer.

Objective

The project will integrate several new processes into the business workflow to improve customer service and operational efficiency:

1. **Automated Order Confirmations:** Post-order confirmation, customers will receive an email update, fostering engagement and strengthening customer relations.
2. **Dynamic Loyalty Program:** Customer loyalty statuses will be updated based on purchase history, enabling personalized rewards and promoting repeat business.
3. **Proactive Stock Alerts:** When stock levels drop below five units, automatic emails will notify the warehouse team, ensuring timely restocking and preventing runout.
4. **Scheduled Bulk Order Updates:** Daily at midnight, the system will process bulk orders, updating financial records and adjusting inventory, ensuring accurate stock levels for daily operations."

Methodology / Techniques Used

Salesforce

Salesforce is a leading cloud-based platform that helps businesses manage customer relationships, streamline operations, and drive growth. It offers tools for sales, service, marketing, analytics, and more—all unified in one ecosystem**.**

Salesforce CRM (Customer Relationship Management) is the core product that enables companies to track customer interactions, automate workflows, and personalize engagement. It centralizes data across departments, making it easier to nurture leads, close deals, and deliver top-notch service.

Custom Data Modelling: Created custom objects and relationships to handle unique business data. Some of the custom objects that were required and were created are,

- **Handsmen Customers**
- **HandsMen Orders**
- **HandsMen Products**
- **Intventory**
- **Marketing Campaign**

Validation Rules: Implemented directly in the UI to maintain data accuracy. We used multiple validation rules that will be discussed later in the report.

Process Builder / Flow Builder: Automated workflows for order confirmation, stock alerts, and loyalty program management.

Email Alerts: Configured with workflows to send real-time notifications. These Emails were triggered by using the Triggered floes and by the scheduled triggered flows, which when activated will send the email to the customer or to the inventory owner.

Scheduled Apex Jobs / Scheduled Flows: Set to execute daily tasks like bulk order processing.

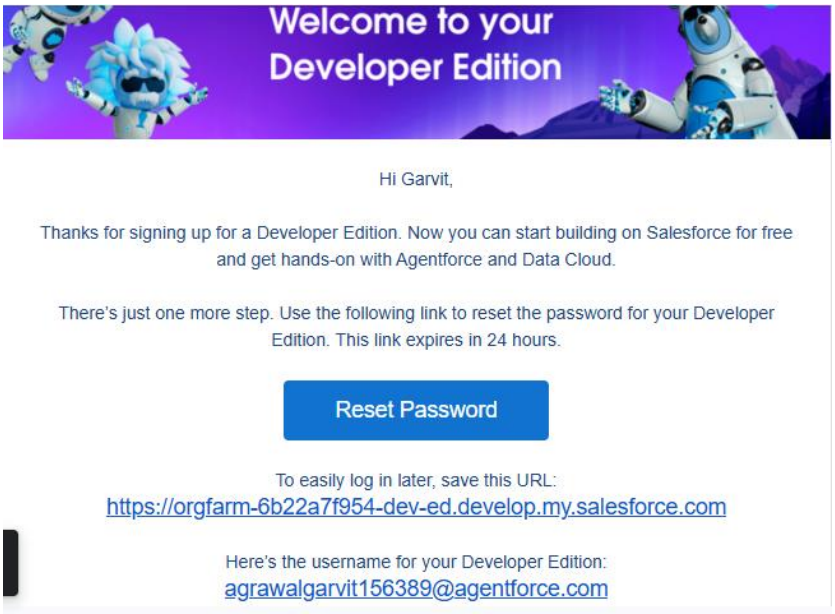
Reports & Dashboards: Visual tools for monitoring orders, stock status, and customer trends.

Detailed Execution of Project Plan

Developer Account Creation/ Setup

Salesforce org was created by the link provided, https://developer.salesforce.com/signup,

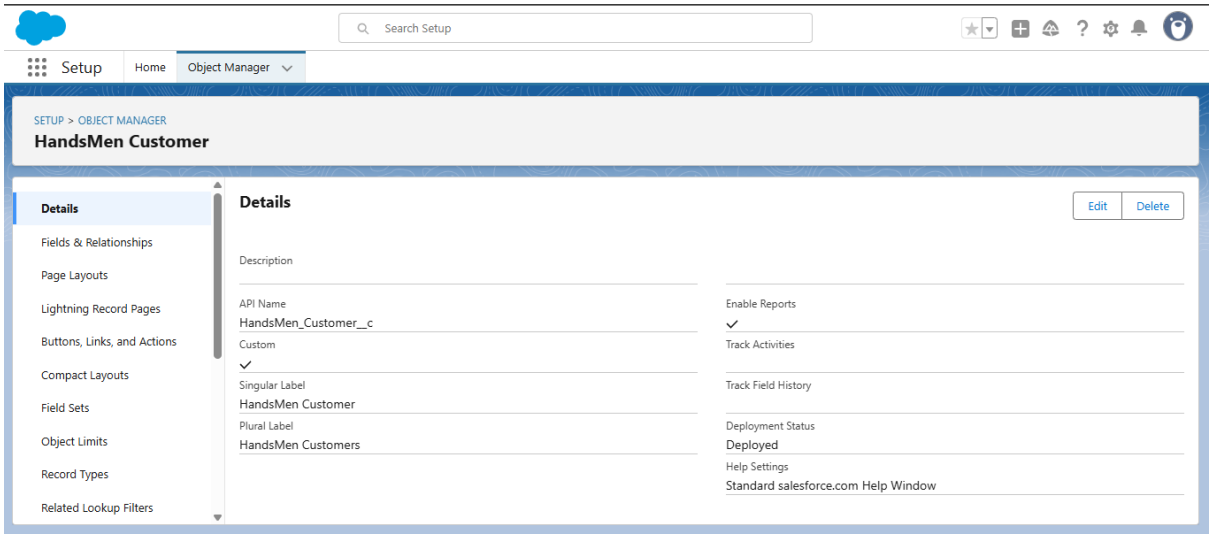
The account was verified by resetting the password, and our Developer Edition Org was successfully created.



Data Management - Objects

We were required to create some custom objects in our org, the custom objects were,

- HandsMen Customers
- Hands Men Orders
- HandsMen Products
- Inventory
- Marketing Campaign



Handsmen Customers:- This custom object was made to have the information about the customers we have.

HandsMen Orders:- This custom object was created to track and manage the orders ordered by the respective customers.

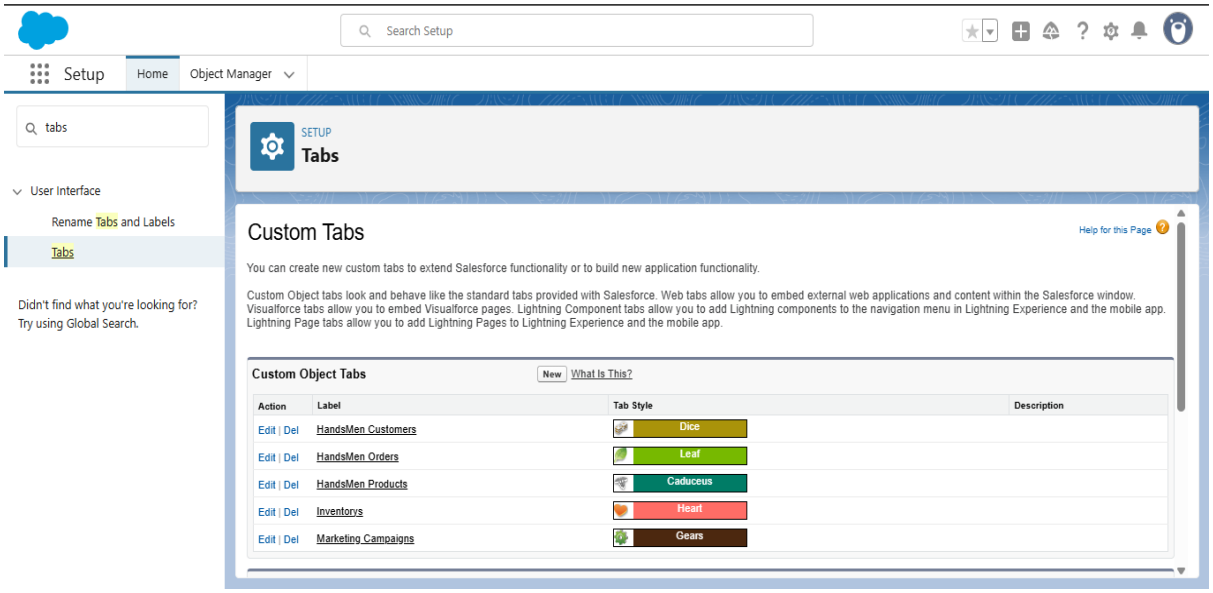
HandsMen Products:- This custom object was created to manage the available products.

Inventory:- This custom object was created to see and track the stock of the products and to track how much and where the stock is stored in the warehouse.

Marketing Campaign:- This custom object was created to manage the marketing events.

Data Management – Tabs

In the HandsMen Threads Salesforce CRM, custom tabs were created to provide intuitive navigation and user-friendly access to custom objects and business-specific data models developed during the project. These tabs served as entry points for interacting with different entities crucial to the brand's operations, such as orders, loyalty programs, inventory records, and warehouse alerts.



Tabs Created for these custom objects,

- HandsMen Customers (Dice)
- Hands Men Orders (Leaf)
- HandsMen Products (Caduceus)
- Inventory (Heart)
- Marketing Campaign (Gears)

Data Management – App Manager

To centralize all CRM functionalities under one cohesive interface, a custom Lightning App named **"**HandsMen Threads**"** was created using the Salesforce App Manager. This app acts as the primary workspace for all departments within HandsMen Threads — including sales, inventory, finance, and customer service — by grouping relevant tabs, objects, and components into a single, streamlined application.

Included Tabs:

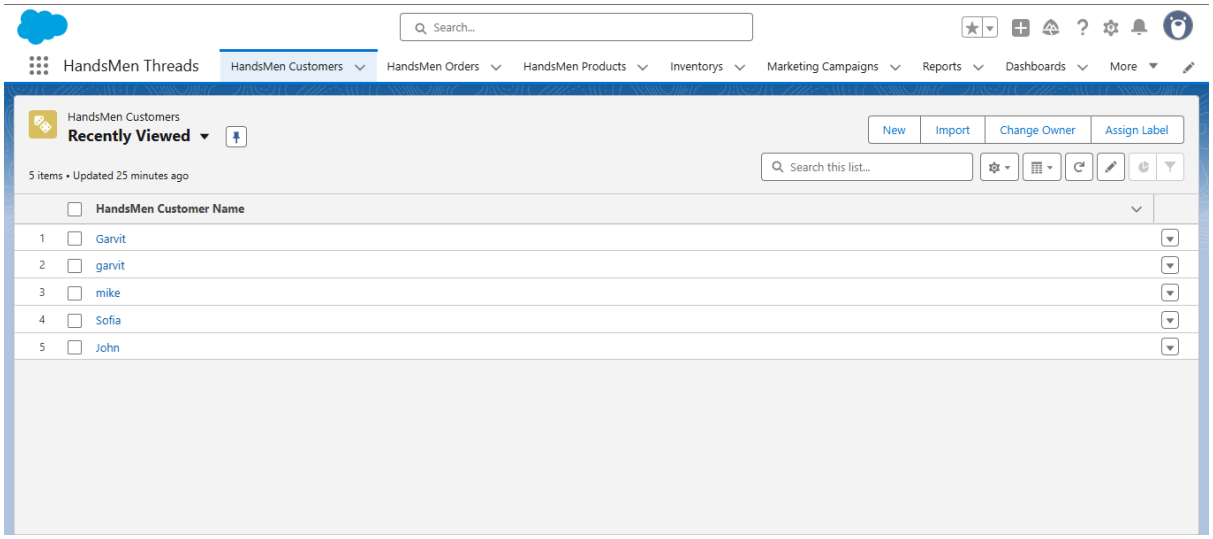
The tabs included were the combination of the custom objects I created and the standard objects received from salesforce. The list of all the objects are below: -

Custom objects

- HandsMen Customers
- Hands Men Orders
- HandsMen Products
- Inventory
- Marketing Campaign

Standard objects

- Reports
- Dashboards



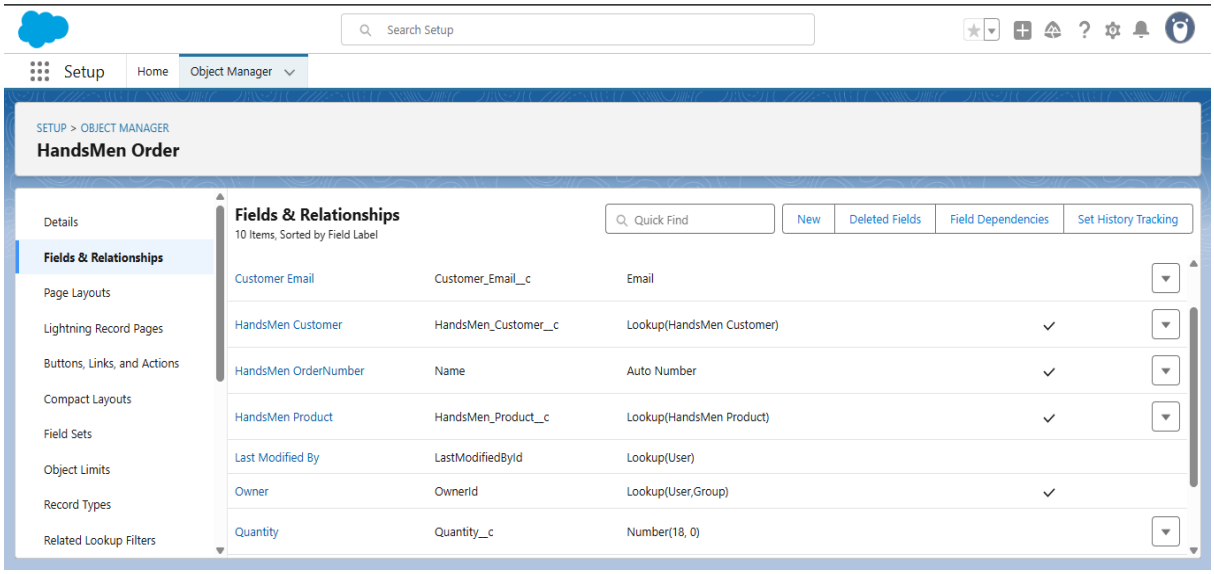
Data Management – Fields

I was supposed to create some fields into the respective custom objects.

In the HandsMen Threads CRM system, Custom Objects were created to model business-specific entities such as HandsMen Customers, HandsMen Orders, HandsMen Products and Inventory. Each of these objects was populated with custom fields tailored to the exact operational and customer data needs of the organization. These fields ensured that every business process could be captured, tracked, and automated within Salesforce with precision.

Custom Fields:

Object Name	Key Fields
HandsMen Customer_c	Name (Record Name), Email (Email), Phone (Phone), Loyalty_Status__c (Picklist: Bronze, Gold, Silver) Total_Purchases__c (Number)
HandsMen Product_c	Name (Record Name), SKU (Text), Price (Currency), Stock_Quantity__c (Number)
HandsMen Order_c	Order_Number (Record Name), Status (Picklist: Pending, Confirmed, Rejection), Quantity__c (Number), Total_Amount__c(Number)
Inventory_c	Auto Number (Record Name), Warehouse (Text), Stock_Quantity__c (Number)
Marketing Management_c	Campaign_Name (Record Name), Start_Date (Date), End_Date (Date)



Similar to this we have all the fields written inside every custom object as said.

Creation of Lookup Relationship

We established some lookup relationships between the custom objects to have a dependency between them. The lookup relationship are given bellow:

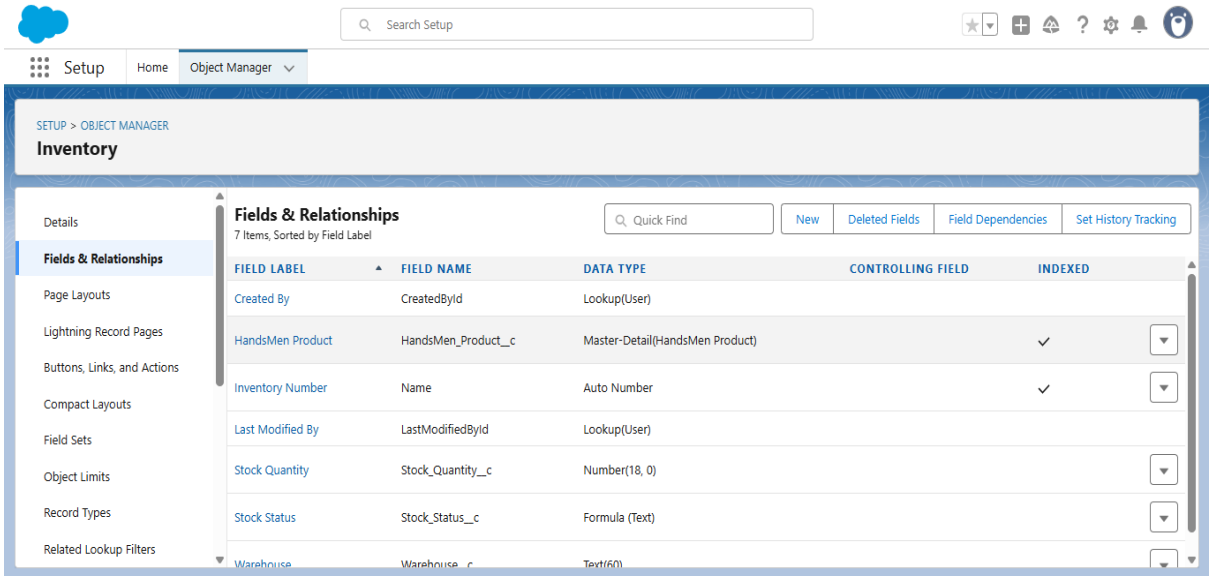
1. **Creating lookup relationship between Marketing Campaign and HandsMen Customers.**

2. **Creating lookup relationship between HandsMen order and HandsMen Product.** This relationship was created to automatically update the changes in the Product object when the customer confirms the order.

3. **Creating lookup relationship between HandsMen Order and HandsMen Customers.**

Creation of Master-Detail Relationship

We established some master-detail relationship btw the custom objects to automatically have a change in their objects when one or the other has a confirmation of the order. Here the relationship is established **between Inventory and HandsMen Product**. Were this relationship can hold the values of the respective product in the inventory and can store the data related to it.



Creation of Formula Fields

To enhance real-time data visibility and reduce manual calculations, formula fields were implemented within custom objects. These fields dynamically display values based on logic applied to other fields, ensuring clarity and automation in business processes.

1. **Inventory__c → Stock_Status__c**

   To provide a quick visual status of item availability without requiring users to check the numeric stock count manually.

   Formula:
   IF(Stock_Quantity__c > 10, "Available", "Low Stock")

2. **HandsMen_Customer__c → Full_Name__c**

   To combine a customer's first and last names into one clean, display-friendly field.

   Formula:
   FirstName & " " & LastName

Data Configuration – Validation Rules.

To ensure data accuracy**,** business logic enforcement, and error prevention, several Validation Rules were implemented across the custom objects in the HandsMen Threads CRM system. These rules help maintain clean, reliable data and avoid processing incorrect or illogical records.

1. HandsMen_Order__c → Total_Amount__c

Validation Rule: **"Total Amount"**

Total_Amount__c <= 0

Purpose: Prevents order entries with zero or negative total amounts.

2. Inventory__c → Stock_Quantity__c

Validation Rule: **"Stock Quantity"**

Stock_Quantity__c <= 0

Purpose: Blocks the saving of inventory records where the stock count is zero or negative.

3. HandsMen_Customer__c → Email

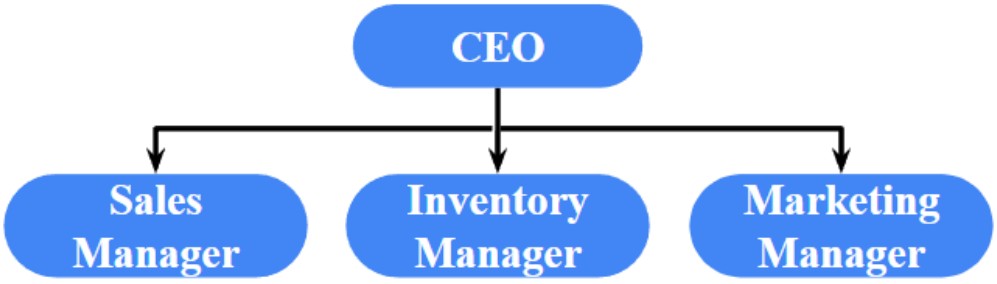
Validation Rule: **"Email"**

NOT CONTAINS (Email, "@gmail.com")

Purpose: Restricts entries to only Gmail addresses (or blocks non-Gmail ones, depending on the requirement).

Data Security – Roles

In the HandsMen Threads CRM, a clear role hierarchy was established to define data visibility, access control, and reporting structure within the organization. The goal was to simulate a real-world operational environment and ensure that different teams could collaborate efficiently while maintaining proper data segregation and oversight.



Structure Implemented

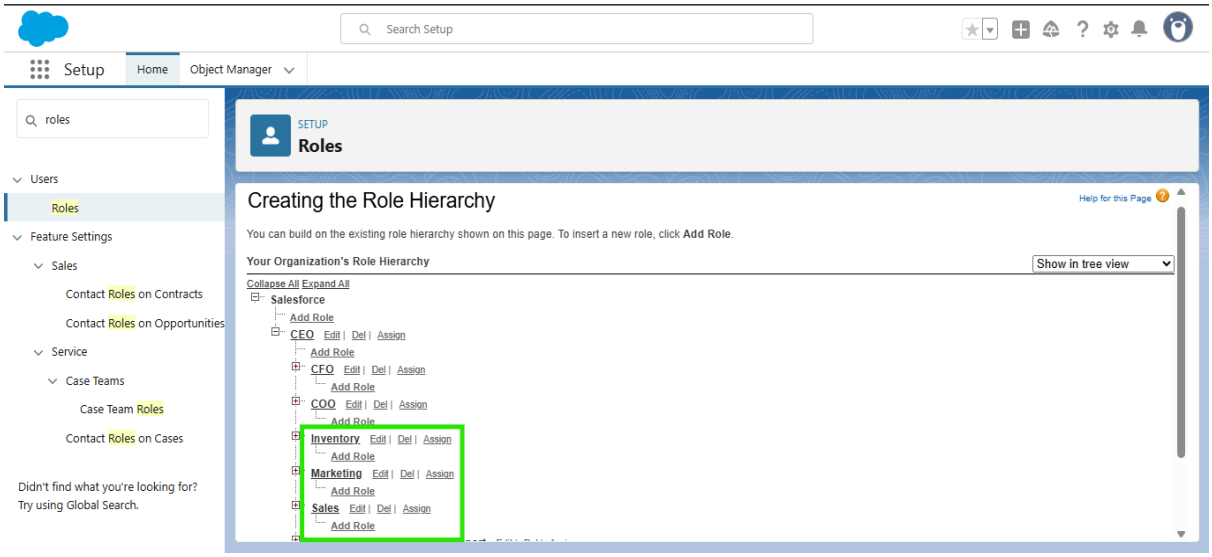
At the top of the hierarchy:

- **CEO (Chief Executive Officer)** – Has visibility into all records and activities across departments.

Reporting directly to the CEO:

1. **Sales Manager (Label: Sales)**
   Responsible for overseeing customer orders, revenue reports, and loyalty programs.
2. **Marketing Manager (Label: Marketing)**
   Handles customer engagement, loyalty campaigns, and customer communications.

3. **Inventory Manager (Label: Inventory)**
   Oversees stock levels, restocking workflows, and warehouse notifications.



Data Security – Users

To assign the respective roles we created some demo users that were asked to create in the user story.

First user:

Name: Niklaus Mikaelson

Role: Sales

User Licence: Salesforce Platform

Profile: Platform 1

Second user:

Name: Kol Mikaelson

Role: Inventory

User Licence: Salesforce Platform

Profile: Platform 1

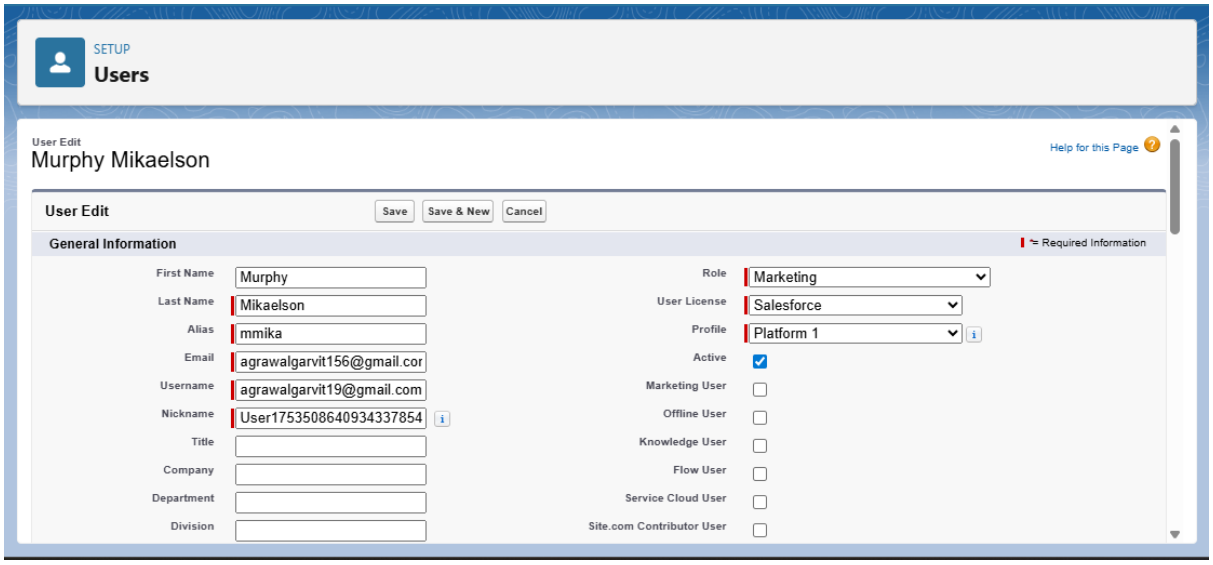
Third user:

Name: Murphy Mikaelson

Role: Marketing

User Licence: Salesforce Platform

Profile: Platform 1



Data Security – Permission Sets

In the HandsMen Threads CRM, Permission Sets were strategically used to define object-level access for different departmental roles. This approach ensured flexibility and avoided the need to create and manage multiple custom profiles.

Each role was granted only the necessary permissions via dedicated permission sets, supporting secure and role-specific access across the CRM.

I created 3 permission sets for various reasons, the three permission sets are below:

Sales Permission Sets

Full access (Read, Create, Edit, Delete) to Customers and Orders.

Inventory Permission Sets

Read and Edit access on Inventory and HandsMen Products via a custom permission sets.

Marketing Permission Sets

Read access on Customers and Edit access on Marketing Campaigns.

Email Template

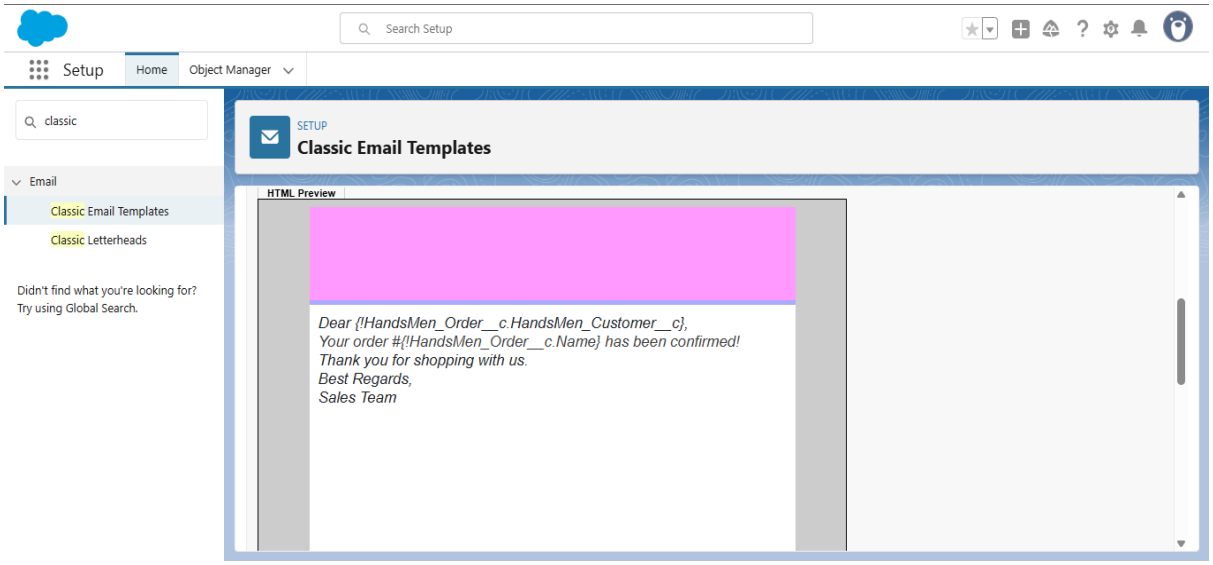
In the HandsMen Threads Salesforce CRM, one of the key features implemented was the automation of order confirmation emails. This functionality ensures that customers receive an immediate acknowledgment once they place an order, enhancing the overall user experience and building trust in the brand.

The Order Confirmation Email Template was designed using Salesforce's Classic Email Templates feature and integrated with a workflow rule or Process Builder/Flow to trigger the email automatically.

We created 3 major email templates for our usage:

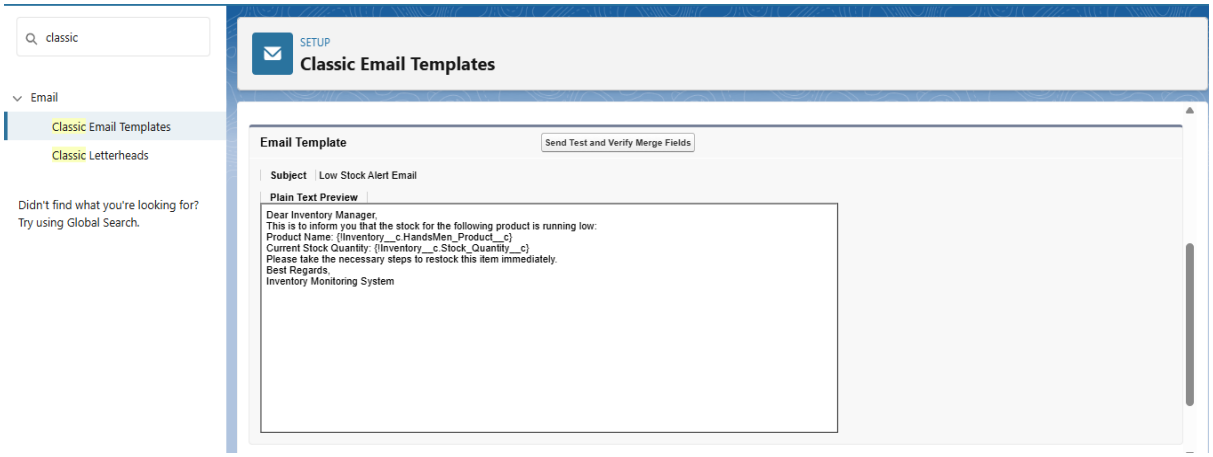
1 . **Order Confirmation Email**

The Order Confirmation Email Template was designed using Salesforce's Classic Email Templates feature and integrated with a workflow rule or Process Builder/Flow to trigger the email automatically when a new record is created in the `HandsMen Order__c` object.



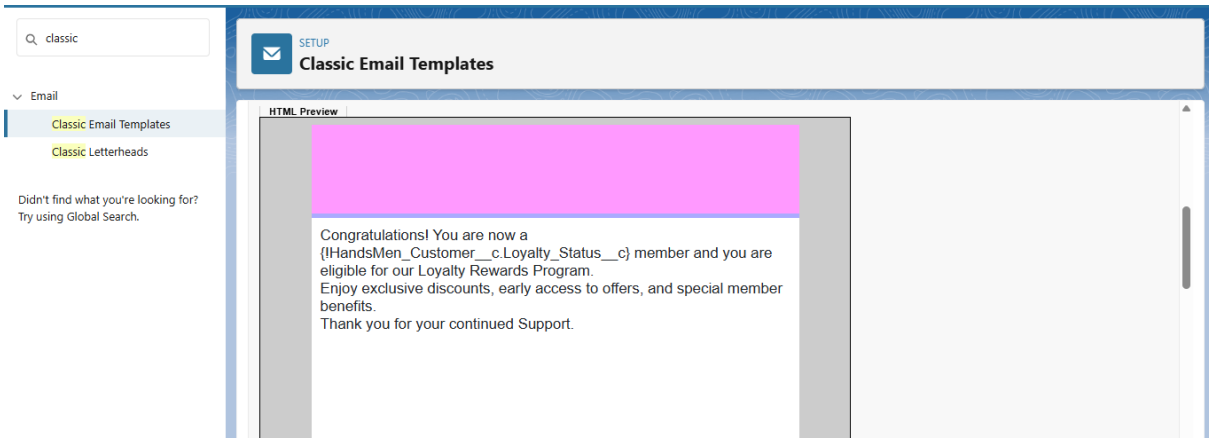
2 . Low Stock Alert:

To maintain seamless inventory operations within the HandsMen Threads CRM, a Low Stock Alert Email system was implemented. This feature ensures that inventory managers are automatically notified when product stock levels fall below a defined threshold, enabling timely restocking and preventing potential order delays.



3 . Loyalty Program Email:

As part of the customer retention strategy in HandsMen Threads' Salesforce CRM, a Loyalty Program Email System was implemented to recognize and reward loyal customers based on their purchase history. This system automatically categorizes customers into Gold, Silver, and Bronze tiers and sends personalized emails to notify them of their status.



Email Alerts

These were the email templates but now we created email alerts for each and every template so that the email can reach to the right audience in the right time.

As part of the automation layer within the HandsMen Threads Salesforce CRM, Email Alerts were set up to enable real-time communication between the system and relevant stakeholders.

These alerts play a critical role in notifying users and customers about key events such as order confirmations, low stock warnings, and loyalty program status changes**.**

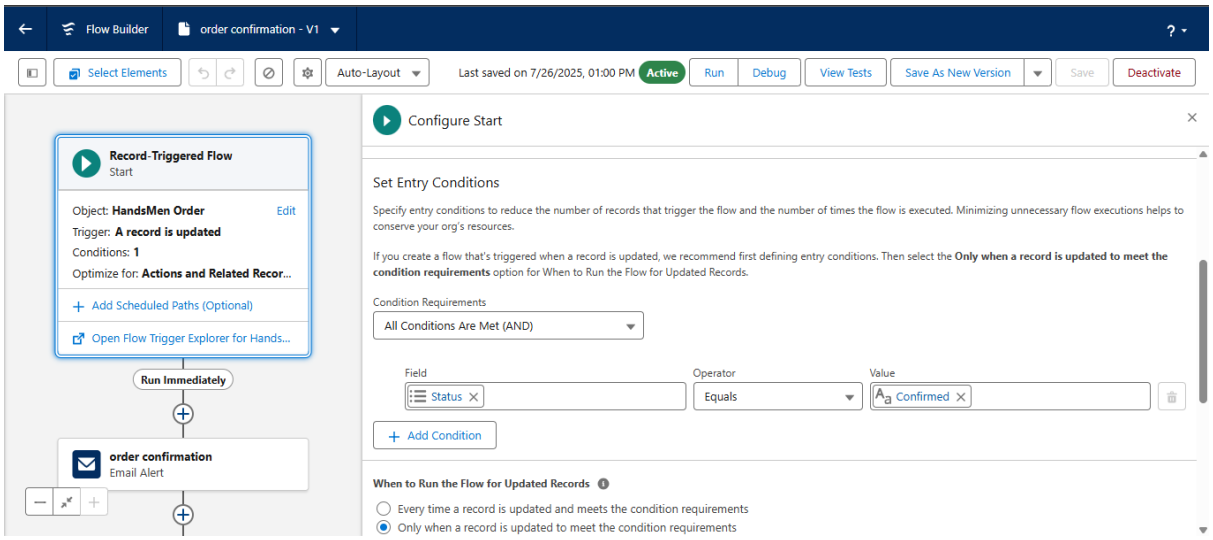
Flows

To automate critical business operations and reduce manual tasks, we implemented **Flows** in Salesforce that trigger actions based on specific conditions. These flows ensure timely updates and alerts to users and customers.

I created 3 flows out of which 2 were record triggered flows and one was schedule triggered flow.

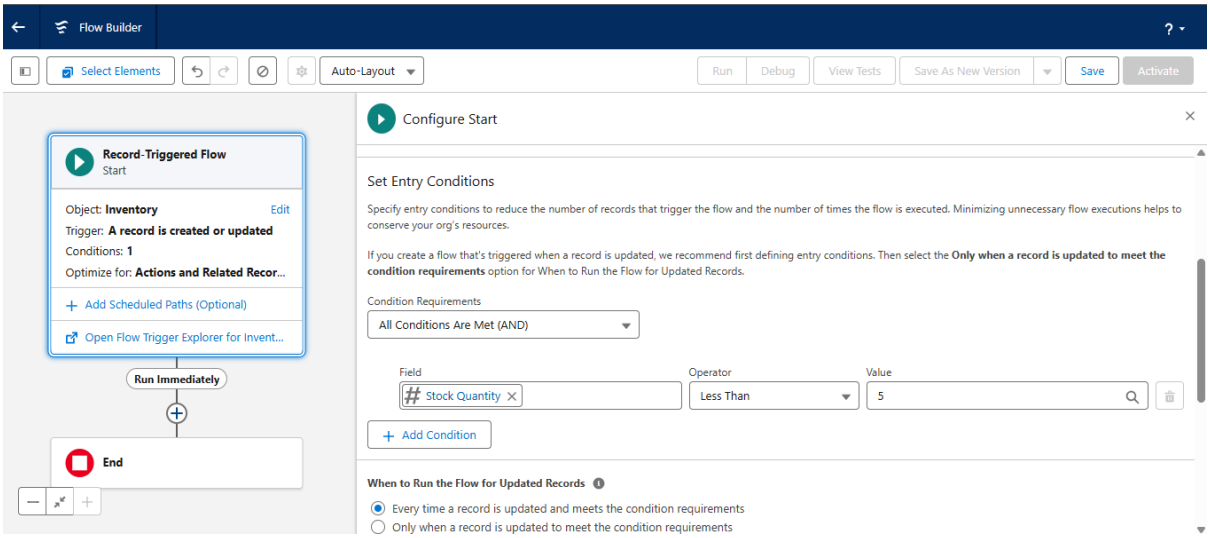
1 . Order Confirmation Flow

- **Type:** Record-Triggered Flow
- **Purpose:** Sends an automated confirmation email when an order is marked as “Confirmed”.
- **Business Impact:** Enhances customer experience by acknowledging orders instantly and sending them an email alert saying your order has been confirmed.



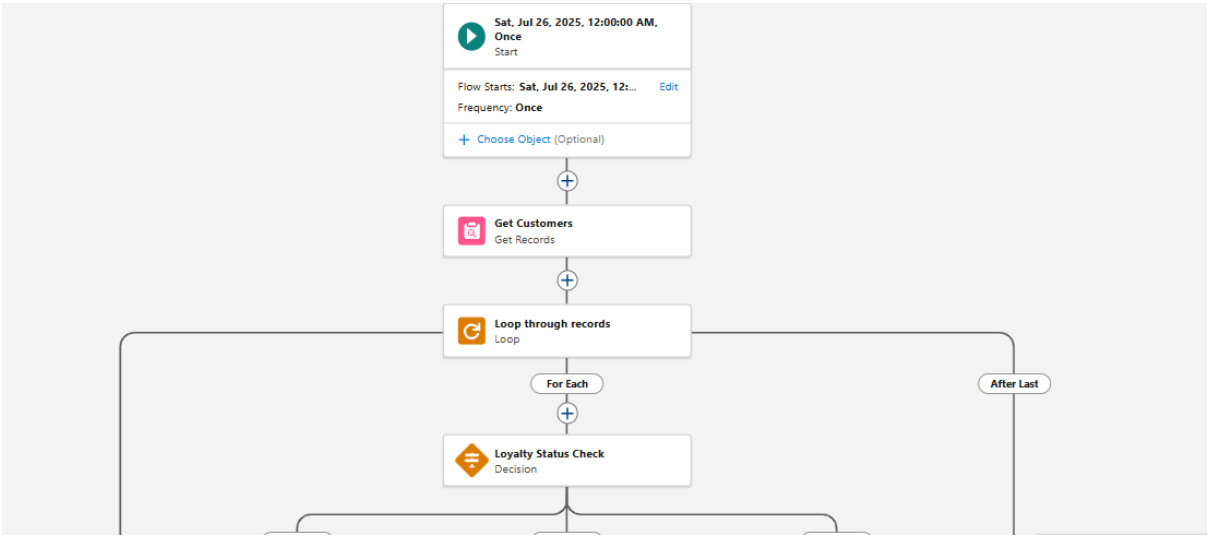
2 . Stock Alert Flow

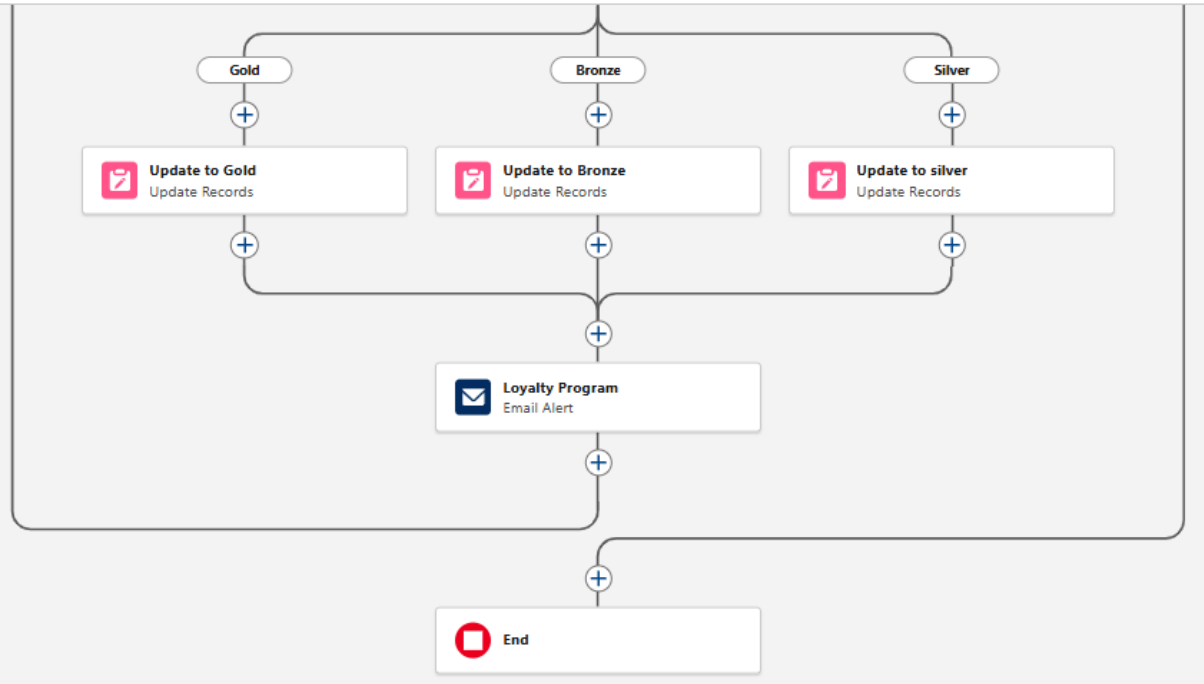
- **Type:** Record-Triggered Flow
- **Purpose:** Triggers a low stock alert when inventory drops below the critical threshold (less than 5 units).
- **Business Impact:** Helps the inventory team take immediate replenishment action, avoiding stockouts also sends an immediate email to the inventory owner or the company owner asking them to refill the stock before it runs out.



3 . Loyalty Status Flow

- **Type:** Scheduled Flow
- **Purpose:** Evaluates the total purchase amount of customers and updates their loyalty tier (`Gold`, `Silver`, or `Bronze`).
- **Business Impact:** Keeps customer segmentation up to date for targeted marketing and personalized communication and sends personalized email by congratulating them and by categorizing them by adding them into their respective domain.





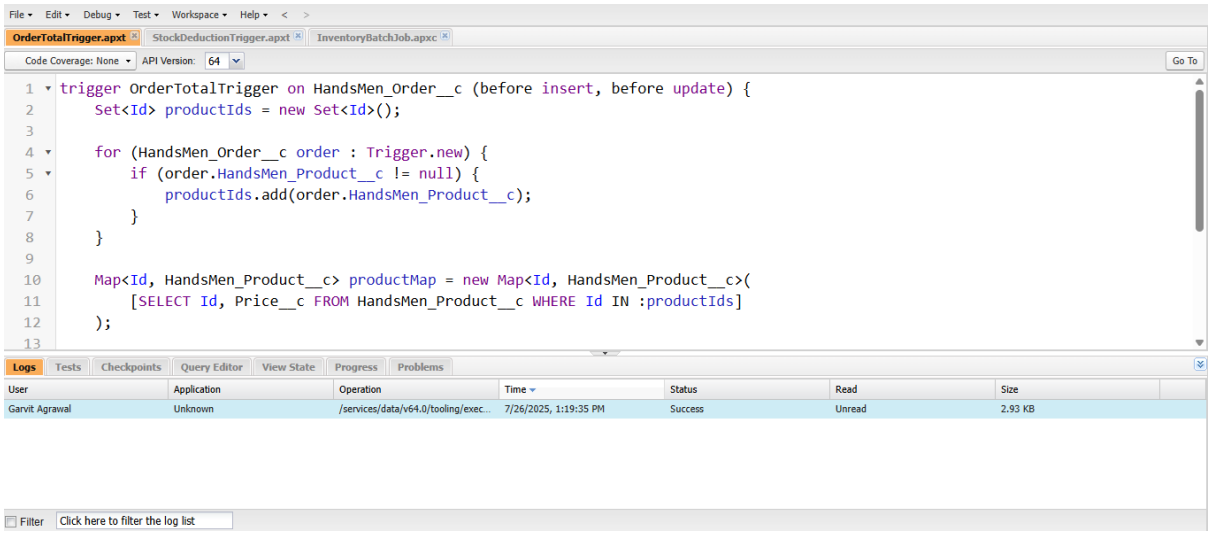
Automation using Apex

To ensure efficient backend processing and data consistency, we implemented Apex Triggers on custom objects. These triggers automate crucial business logic without requiring user intervention.

Two Apex triggers were created for 2 different automations.

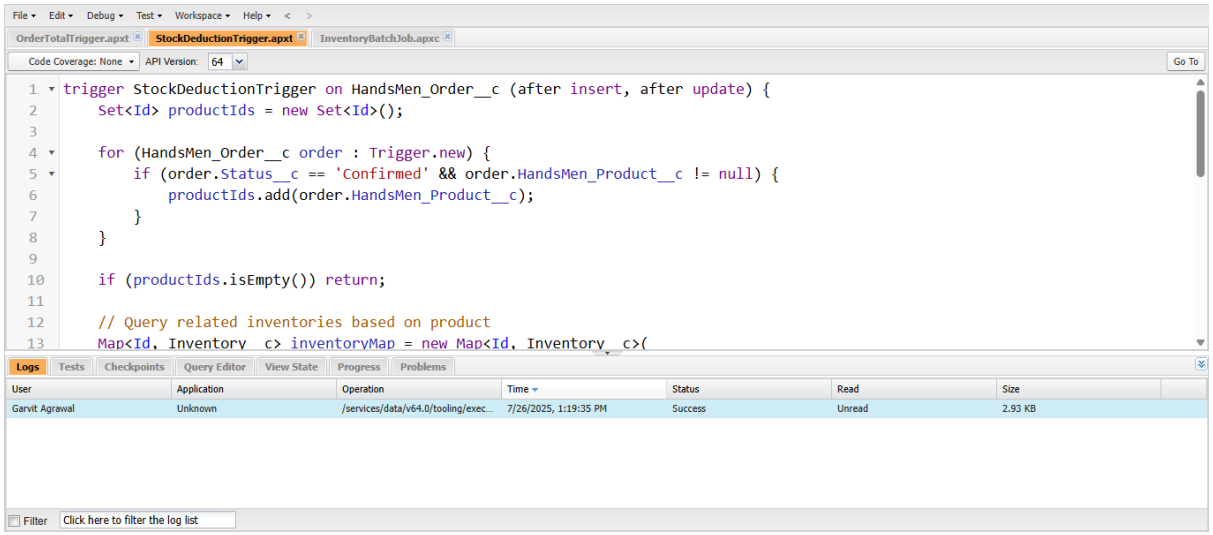
1 . Update Order Total Trigger

- **Object:** HandsMen_Order__c
- **Purpose:** Ensures that the `Total_Amount__c` field is automatically calculated and updated based on the line items or products associated with the order.



2 . Stock Deduction Trigger

- **Object:** `Inventory__c`
- **Purpose:** Monitors orders and deducts the appropriate quantity from the related inventory record as soon as an order is placed.



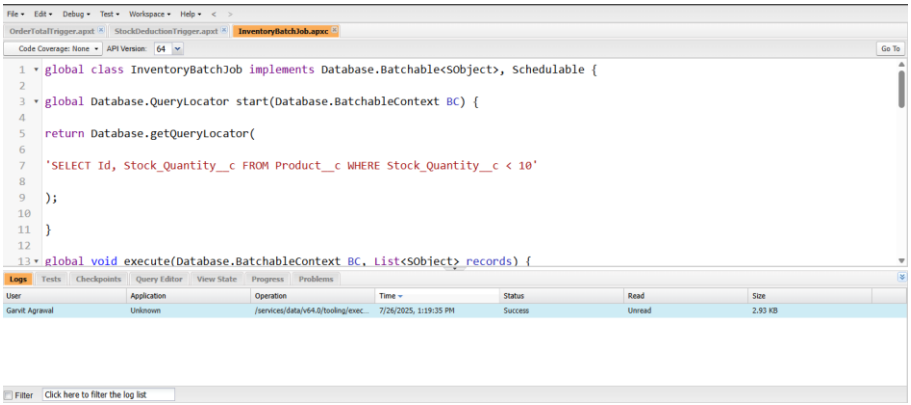
NOTE: Did not create the third and last Trigger because I already achieved that with the help of flows so it was totally useless for creating one.

Batch Jobs – Creating Batch Apex

To handle large-scale data operations and background processing efficiently, we implemented **Batch Apex Jobs**. These jobs execute asynchronously and are ideal for time-based or bulk processing tasks.

Loyalty Points Calculation

- **Purpose:** Automatically evaluates customer purchase history and updates their loyalty points weekly.
- **Impact:** Supports loyalty programs by accurately rewarding customers in Gold, Silver, or Bronze categories.



Project Explanation with real world Example.

Let's walk thorough it like a real world customer interaction.

1**. Customer Registration**

- A customer, Josh Guitarist, visit the store or website.
- In Salesforce: A record is created in the Customer object with his name, phone, email etc.
- A Validation Rule ensures the email format is correct - for example it must contain @gmail.com.

2. **Product Setup**

- The admin adds products (eg. shirts, jeans) into HandsMen_Product__c object.
- Each product includes pricing and other details.
- Inventory is also created to manage available stock for these products.

3. **Order Placement**

- John places an order for 2 shirts priced at ₹500 each.
- In Salesforce, a new record is created in the Order object.
- An Apex Trigger calculates the Total_Amount__c = 2 × 500 = ₹1000 automatically.

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

- John 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, John becomes a Silver member.

6. Email Notifications

- When a new order is placed or loyalty status is updated:
  Flow + Email Alert is triggered.
- John gets an email:
  "Thanks for your purchase! Your loyalty status is now Silver."

Screenshots

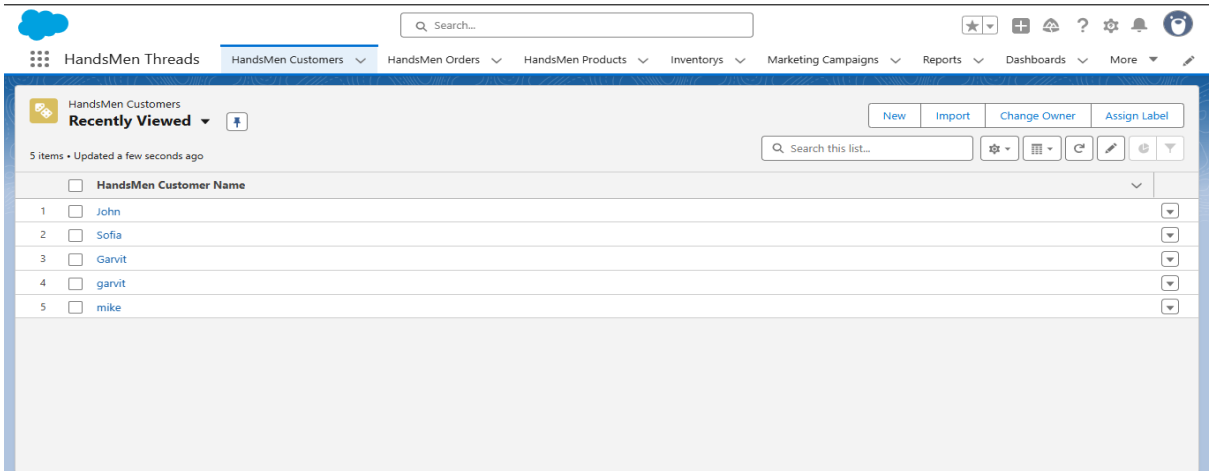


Fig. Custom App for HandsMen Threads

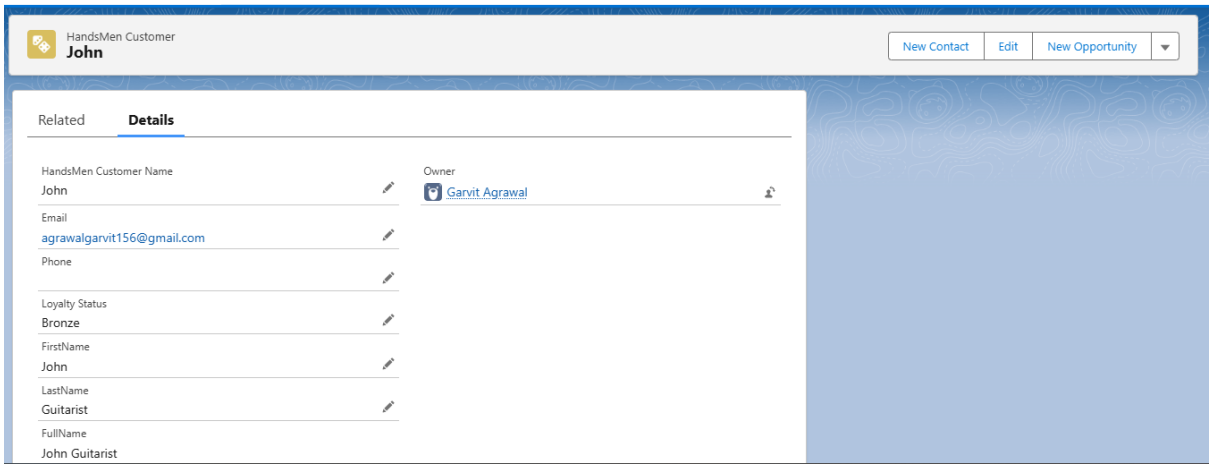


Fig. Customer creation

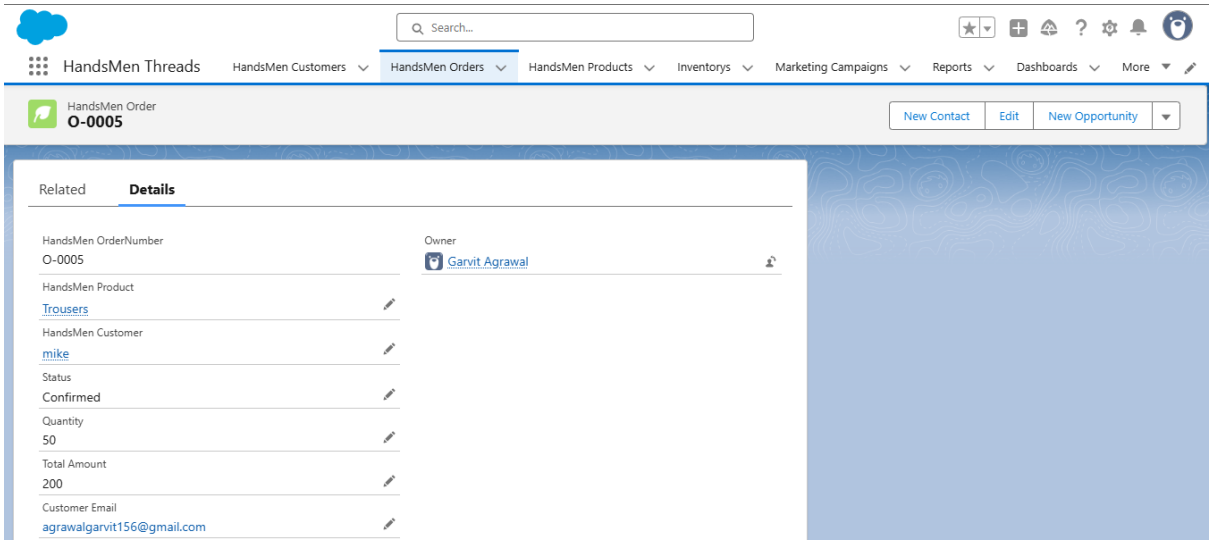


Fig. Order confirmation of the customer

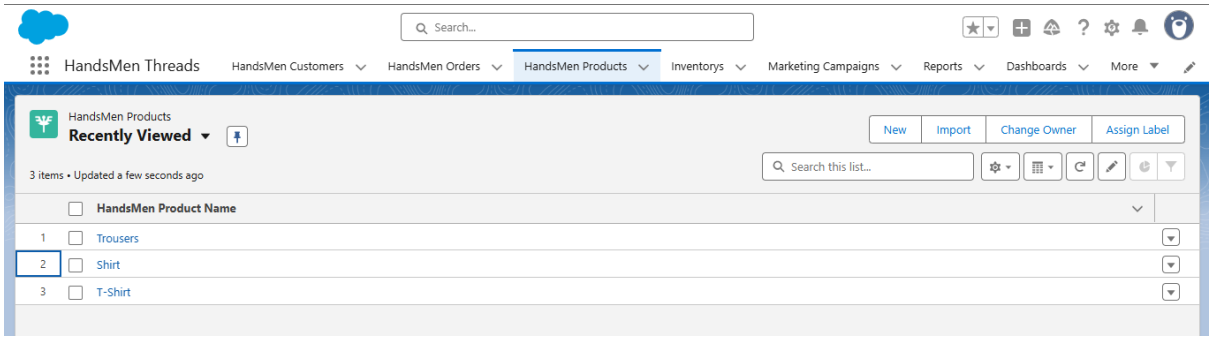


Fig. Collection of available product's in our store

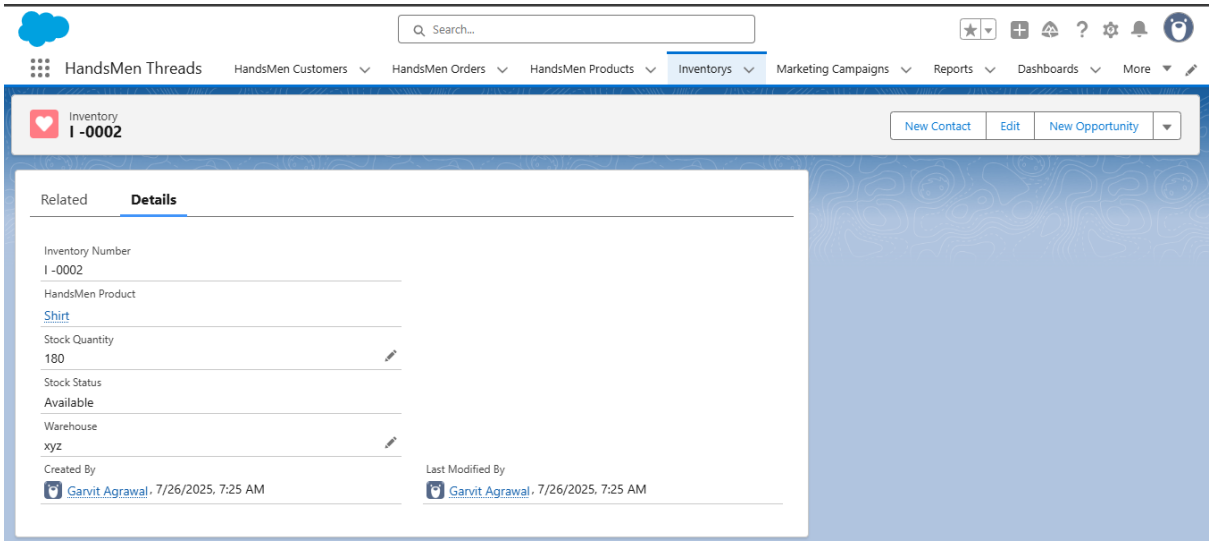


Fig. Inventory of HandsMen Threads

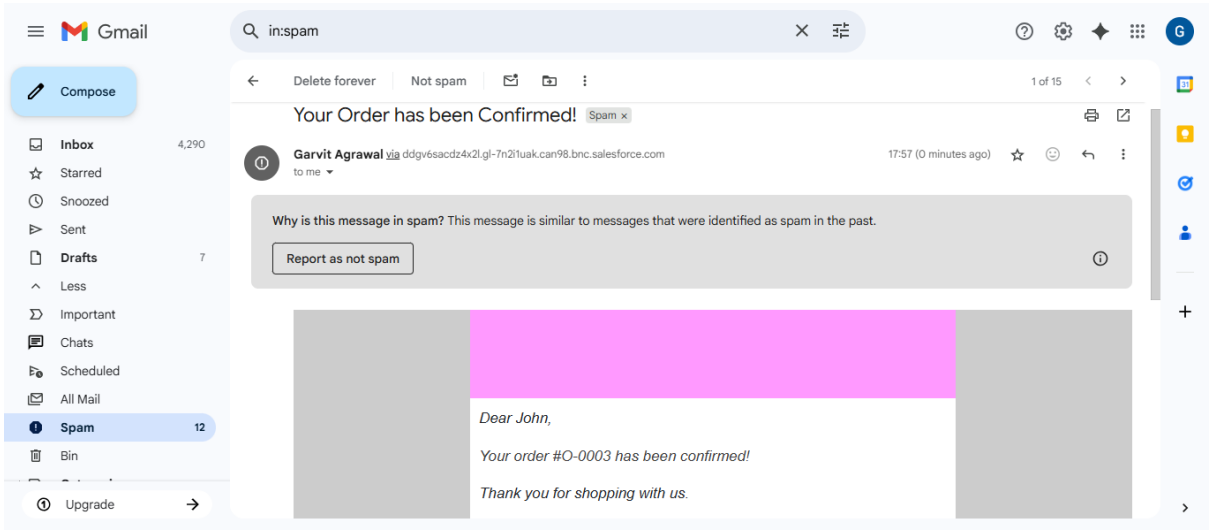


Fig. Order Confirmation Email

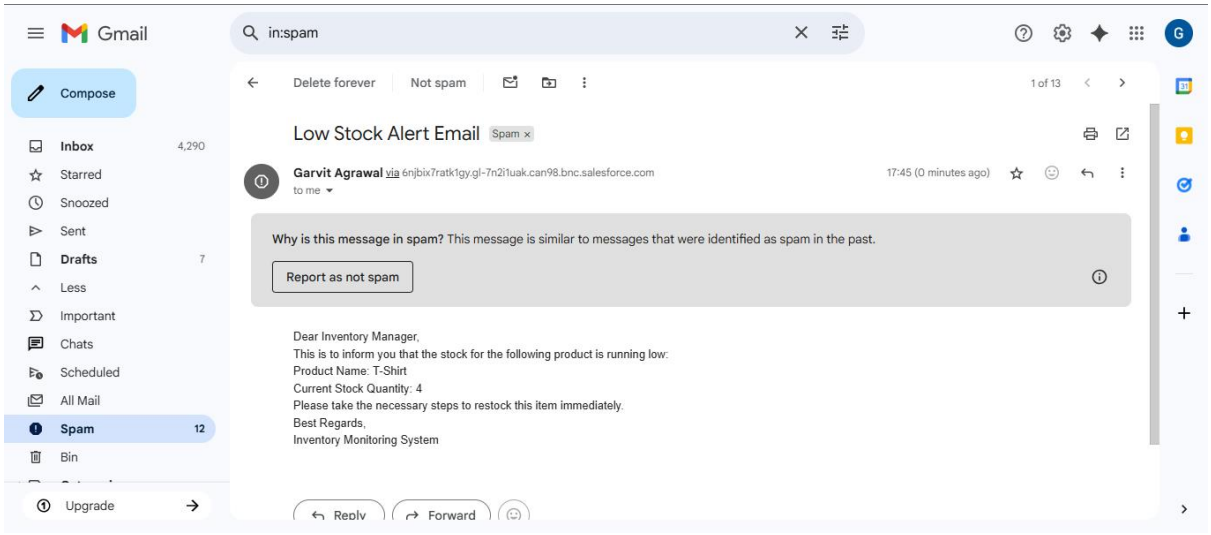


Fig. Low Stock Alert Email

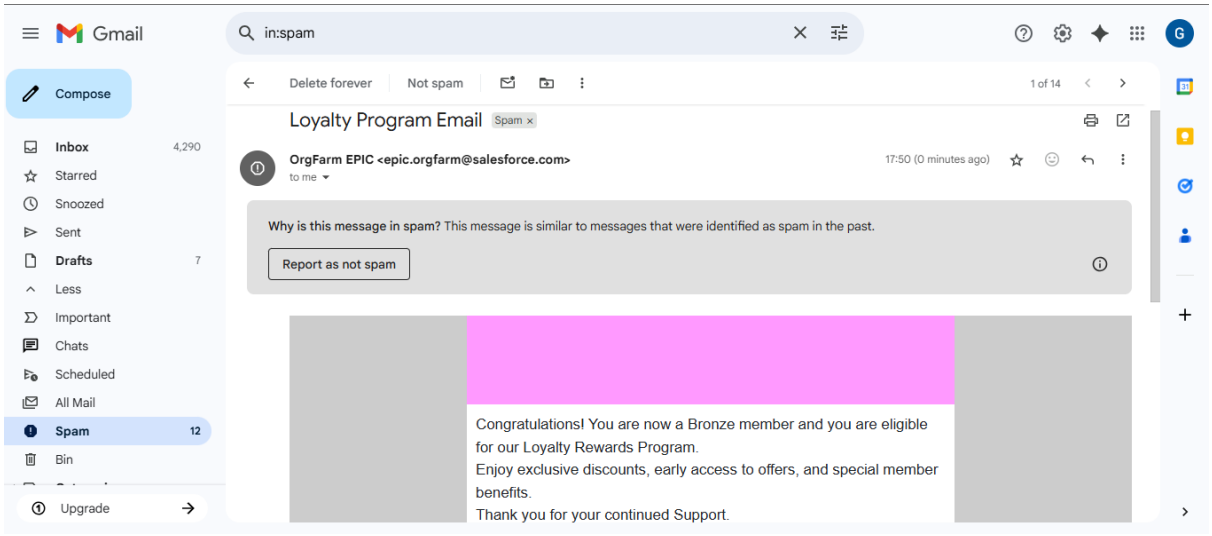


Fig. Loyalty Program Email

Conclusion

The Salesforce-based CRM system developed for **HandsMen Threads**, a fashion and apparel brand, demonstrates an end-to-end digital solution for managing customers, sales, inventory, marketing, and loyalty. The project successfully implements a robust data model, intelligent automation, role-based access, and streamlined communication workflows tailored for a fast-moving retail business.

Future Scope and Enhancements

1. **Integration with Payment Gateways**
    - Automate payment status updates and refund workflows.
2. **Customer Portal**
    - Provide login access for customers to track orders, manage profiles, and view loyalty status.
3. **AI-Powered Recommendations**
    - Use Einstein AI for product suggestions and purchase patterns.
4. **Mobile-Responsive Experience**
    - Develop a Salesforce Mobile App for field sales and warehouse managers.
5. **Enhanced Reporting**
    - Dashboards for revenue, stock aging, customer churn, and campaign ROI.
6. **Multi-Warehouse Support**
    - Expand Inventory Sync to multiple warehouse locations and manage regional stock levels.
7. **Customer Feedback Automation**
    - After order delivery, auto-trigger surveys for experience rating and product feedback