

# HandsMen Threads - Salesforce CRM Implementation

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

### ABSTRACT

This project presents the implementation of a customized Salesforce CRM solution for HandsMen Threads, a premium men's fashion and tailoring brand. The objective was to streamline business operations, enhance customer engagement, and maintain data integrity across departments. The solution involves designing a robust data model featuring five key custom objects: Customer, Order, Product, Inventory, and Marketing Campaign. Business processes were automated using Record-Triggered Flows, Scheduled Flows, Email Alerts, and Apex to handle order confirmations, loyalty status updates, and proactive stock alerts. To ensure clean and reliable data, validation rules were established, and a role-based security model was implemented for the Sales, Inventory, and Marketing teams. The solution also includes a scheduled batch job using Apex to update low stock quantities. This end-to-end CRM implementation improves customer experience through personalized communication, ensures operational efficiency with automation, and lays a scalable foundation for future business growth using the Salesforce Platform.

### OBJECTIVE

The main objective of this project is to develop and implement a customized Salesforce CRM solution for HandsMen Threads to streamline core business operations, maintain data integrity, and enhance customer satisfaction.

By building a centralized system to manage customers, orders, products, inventory, and marketing campaigns, the project aims to:

- Automate key processes such as order confirmations, loyalty status updates, and stock alerts.
- Ensure accurate and consistent data entry using validation rules.
- Enable real-time visibility of inventory and customer interactions.
- Improve internal team coordination through role-based access control.
- Deliver personalized customer experiences through targeted communication and loyalty programs.

# TECHNOLOGY DESCRIPTION

## **Salesforce:**

Salesforce is a cloud-based Customer Relationship Management (CRM) platform that helps businesses manage customer data, automate processes, and improve service, marketing, and sales operations. It provides point-and-click tools as well as programmatic capabilities (like Apex and Flows) to build custom business solutions.

## **Custom Objects:**

Objects in Salesforce are like tables in a database. Custom Objects are created to store specific data.

Example:

- Customer – Stores customer info
- Product – Stores product details
- Order – Stores orders

## **Tabs:**

Tabs are used to display object data in the Salesforce UI.

Example: A tab for Product allows users to easily view and manage products.

## **Custom App:**

An App in Salesforce is a collection of tabs grouped together for a specific business purpose.

## **Profiles:**

Profiles define what a user can see, do, and edit in Salesforce. It controls object permissions, field access, and more.

## **Roles:**

Roles control the data visibility in Salesforce's role hierarchy. It's used for sharing settings and reporting.

## **Permission Sets:**

Permission Sets grant additional permissions to users without changing their profile.

## **Validation Rules:**

Validation Rules ensure data entered meets business criteria.

Example:

- Email must contain @gmail.com
- Stock cannot be negative

### **Email Templates:**

Predefined formats for sending emails to customers or users.

Example: 'Order Confirmation' template

### **Email Alerts:**

Email Alerts are actions in Flows or Workflow Rules that send emails using predefined templates.

Example: When a loyalty level changes, an email is sent to the customer.

### **Flows:**

Flows automate business logic without code. They can create, update, or send notifications.

Example: Flow triggers email alerts on new order.

### **Apex:**

Apex is Salesforce's object-oriented programming language. It allows developers to write custom logic.

Example Triggers:

- Update Total Amount in orders
- Reduce inventory stock

### **Use Case: HandsMen Threads**

HandsMen Threads, a fashion industry leader, is undergoing a Salesforce transformation to:

- Centralize business data through a **robust data model**
- Ensure **data accuracy** via validation from the user interface
- Enhance **customer engagement** and **operational efficiency** using automation

### **Business Goals Implemented in the Project**

- **Automated Order Confirmations**
  - Send confirmation emails to customers upon order creation.
- **Dynamic Loyalty Program**

- Update customer loyalty tiers based on purchase amounts.
- **Proactive Stock Alerts**
- Notify the warehouse team when inventory falls below threshold.
- **Scheduled Bulk Order Updates**
- Process pending bulk orders every midnight and update stock + financials

## What You'll Learn

- Data Modelling
- Data Quality (Validation + Relationships)
- Lightning App Builder
- Record-Triggered Flows
- Apex and Apex Triggers
- Asynchronous Apex (Batch Jobs)

## Lightning App – HandsMen Threads

The Lightning App named "**HandsMen Threads**" was created to provide users with a clean and focused interface for managing all business operations related to customers, products, orders, inventory, and campaigns.

## App Configuration

- **App Name:** HandsMen Threads
- **App Type:** Lightning App
- **Navigation Style:** Standard Navigation
- **Tabs Included:**

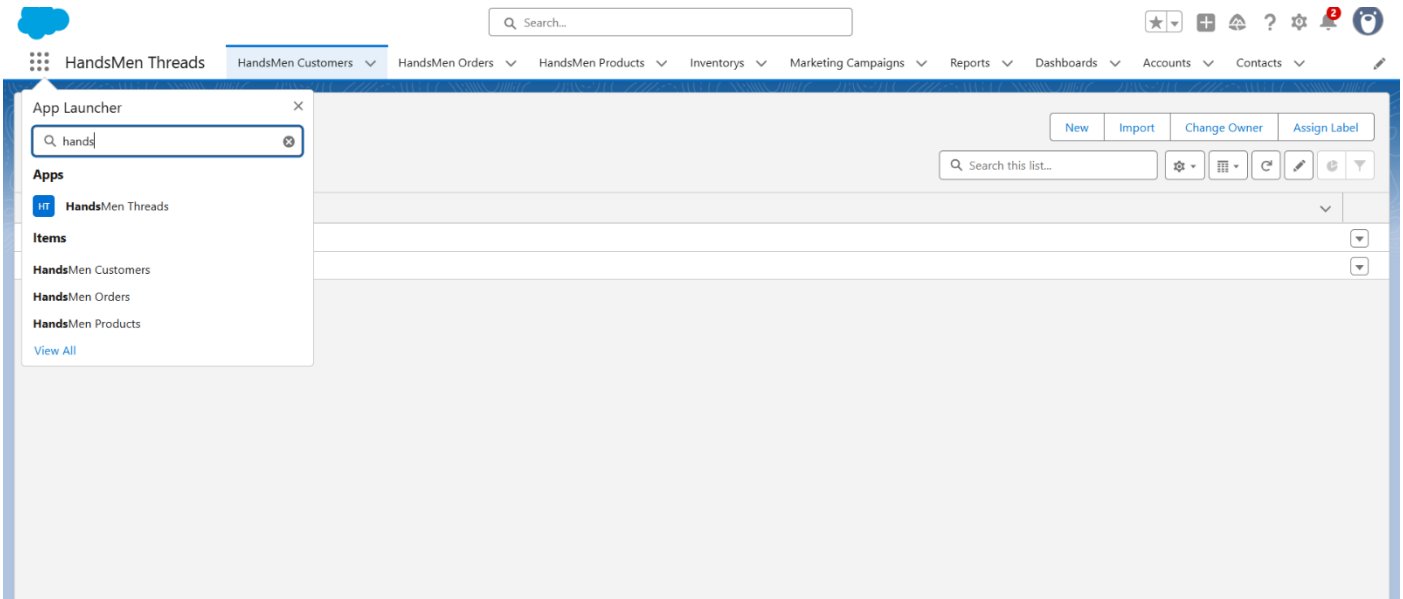
HandsMen Customer

HandsMen Product

HandsMen Order

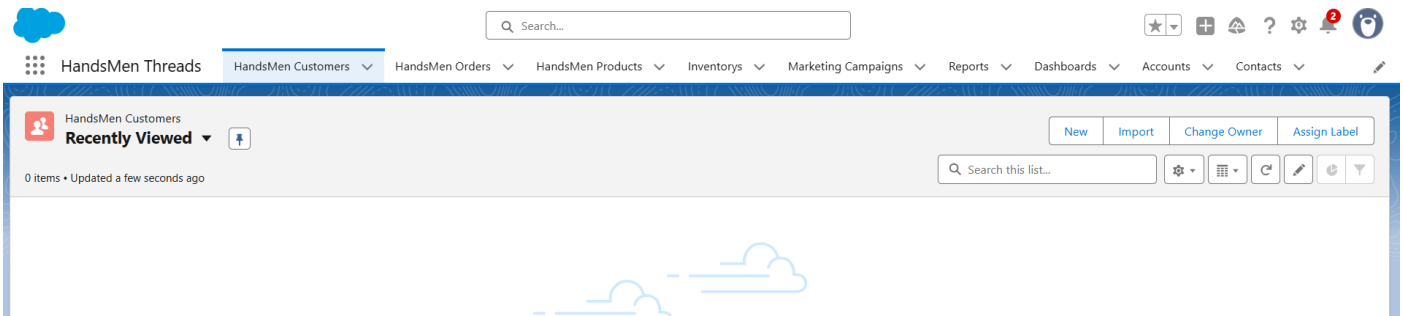
Inventory

# Marketing Campaign



## App Navigation – Tabs View

Shows the app UI with all the configured tabs visible in the navigation bar:



## Automation Flows – HandsMen Threads

This file documents the three automation flows configured to enhance operations in the HandsMen Threads Salesforce org.

### Order Confirmation Flow (Record-Triggered)

**Trigger Object:** HandsMen\_Order\_\_c

**Trigger Condition:** When a record is updated AND Status\_\_c = "Confirmed"

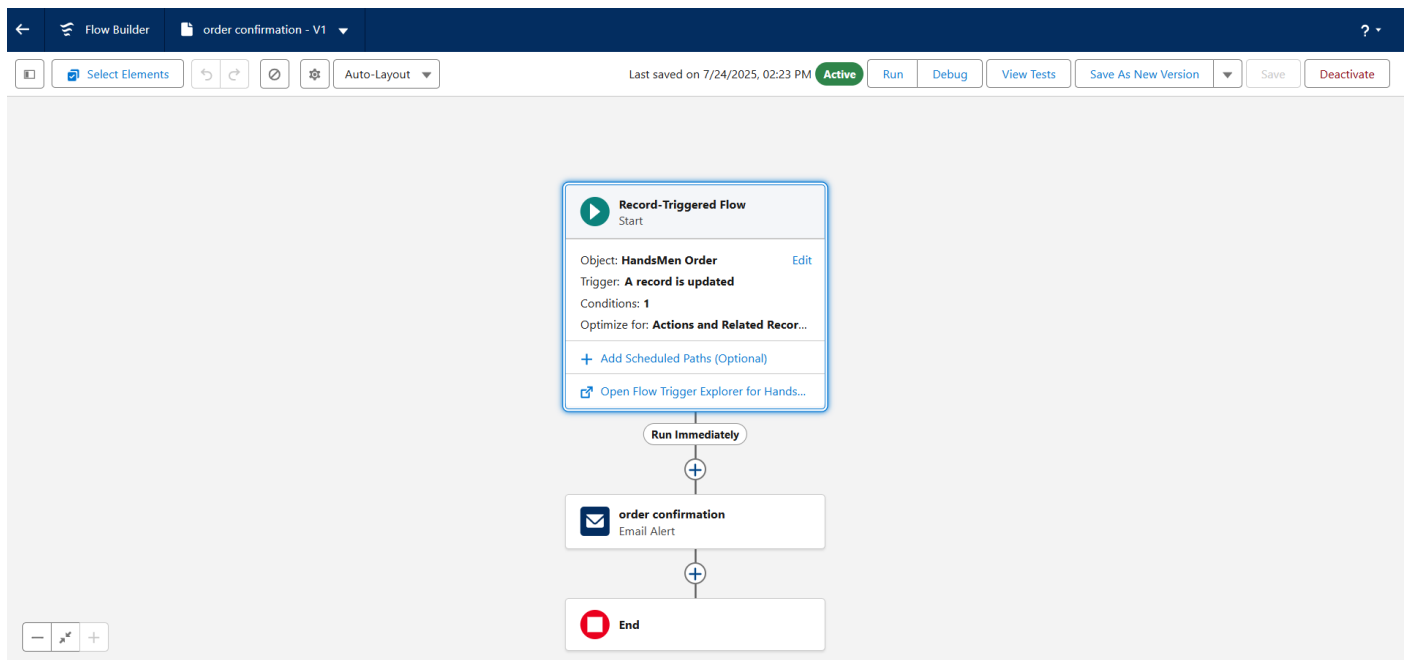
**Frequency:** Only when a record is updated to meet the condition

**Action:** Send email alert to customer

### Flow Steps:

1. Record-Triggered Flow → Object: HandsMen\_Order\_\_c
2. Triggered when Status\_\_c becomes "Confirmed"

3. Action → Send Email Alert → Template: *Order Confirmation Email*
4. Label: Send Order Confirmation Email
5. Record ID: {\$Record.Id}



## Stock Alert Flow (Record-Triggered)

**Trigger Object:** Inventory\_\_c

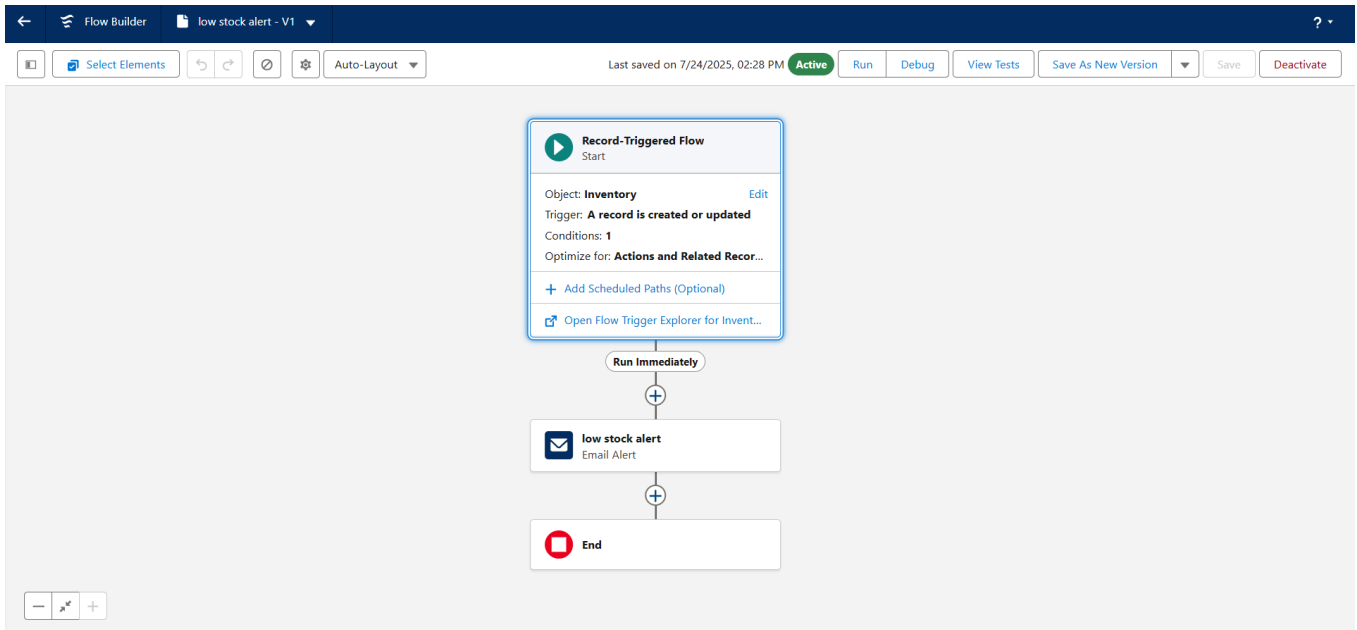
**Trigger Condition:** When a record is created or updated AND Stock\_Quantity\_\_c < 5

**Frequency:** Every time a record is created/updated and meets the condition

**Action:** Send email alert to warehouse manager

### Flow Steps:

1. Record-Triggered Flow → Object: Inventory\_\_c
2. Trigger: Created/Updated → Condition: Stock\_Quantity\_\_c < 5
3. Action → Send Email Alert → Recipient: Inventory Manager
4. Email Alert: *Stock Alert Email Template*



## Loyalty Status Update Flow (Scheduled Flow)

**Trigger:** Scheduled – Daily

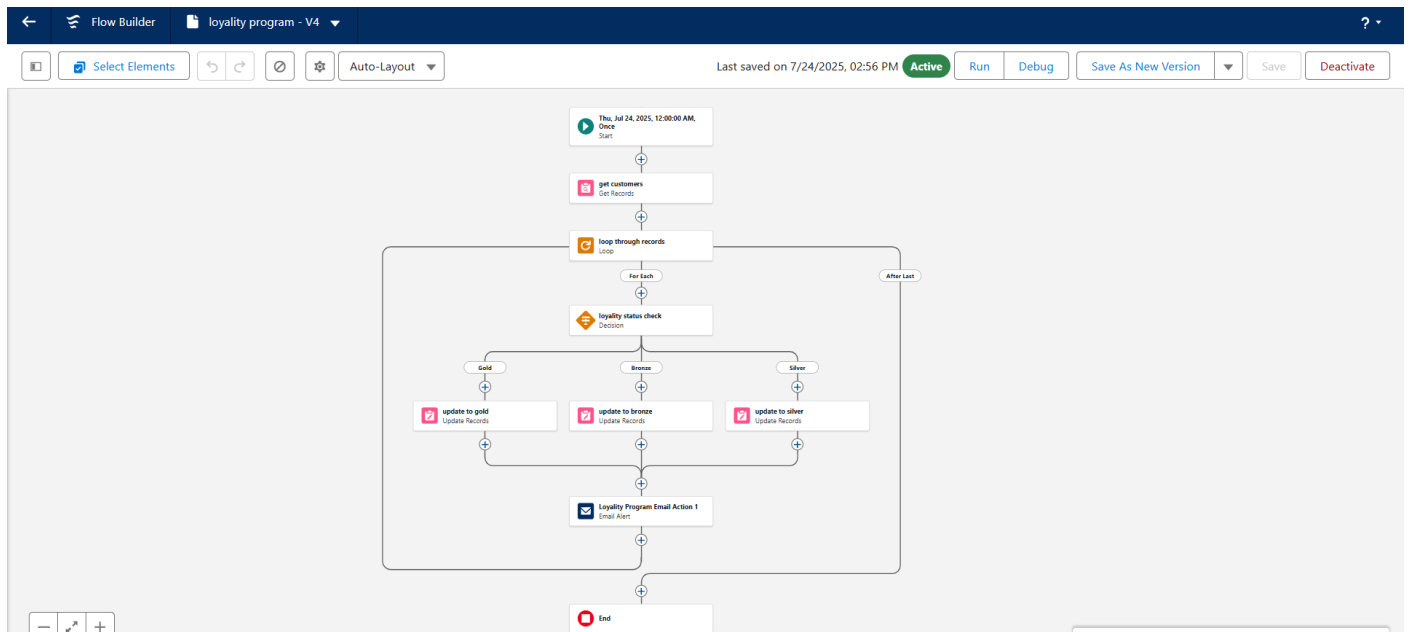
**Object:** HandsMen\_Customer\_\_c

**Purpose:** Update Loyalty\_Status\_\_c daily based on Total\_Purchases\_\_c

**Logic:**

**Flow Structure:**

1. **Get Records** → All customers
2. **Loop** → Through each customer
3. **Decision** →
  4.  $> 1000$  → Gold
  5.  $< 500$  → Bronze
  6. Else → Silver
7. **Update Records** → Set appropriate Loyalty\_Status\_\_c per branch



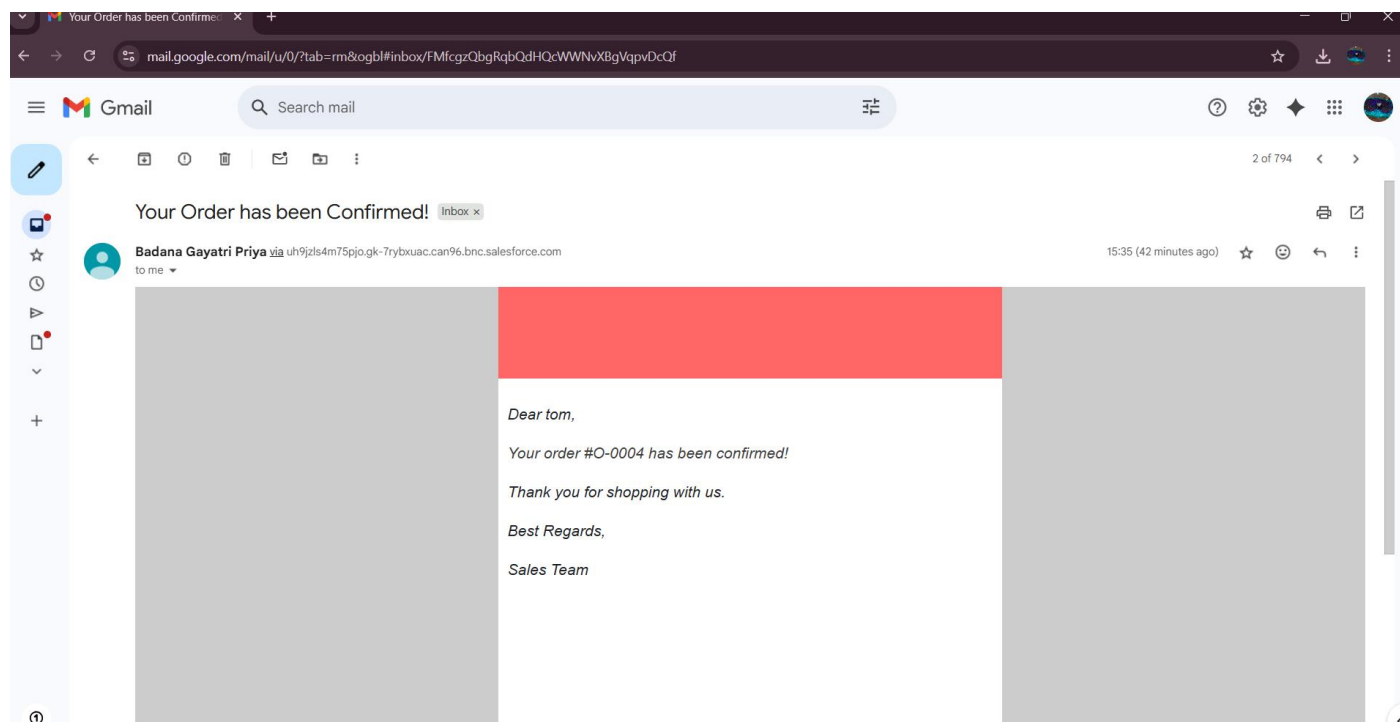
## Email Templates & Alerts – HandsMen Threads

This document outlines the email templates and alerts configured as part of the automation for improved customer and internal communication.

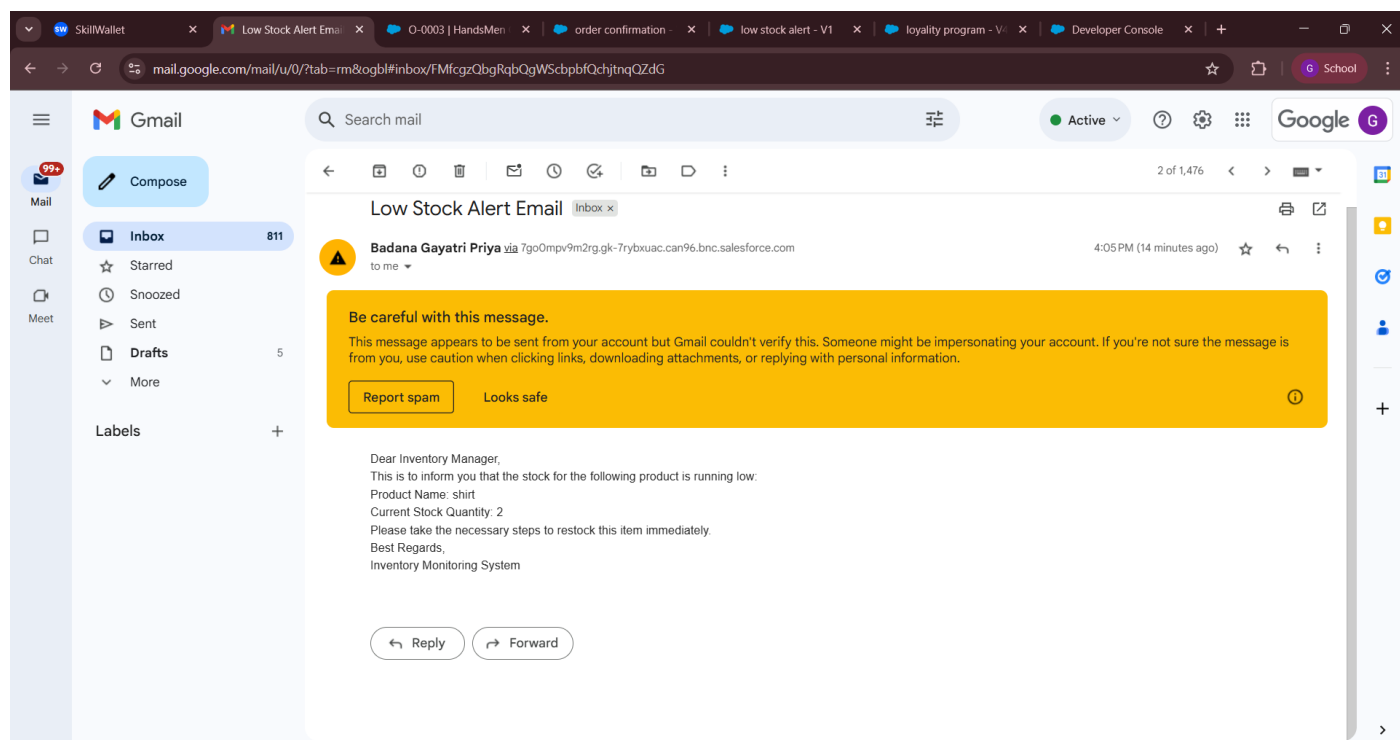
The screenshot shows the 'Classic Email Templates' setup interface. The left sidebar contains a search bar with 'classic' and a list of templates under 'Email'. The main area displays the details for the 'Order Confirmation Email' template. The details include the template name, classic letterhead, email layout, encoding, author, and description. The 'Created By' and 'Modified By' fields are both 'Badana Gayatri Priya'. The 'Last Used Date' is '7/24/2025, 1:41 AM'. Below the details, there are buttons for 'Edit Properties', 'Edit HTML Version', 'Edit Text Version', 'Delete', and 'Clone'. The 'Email Template' section shows the subject line 'Your Order has been Confirmed!' and the HTML preview, which includes a red banner and the text: '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'.



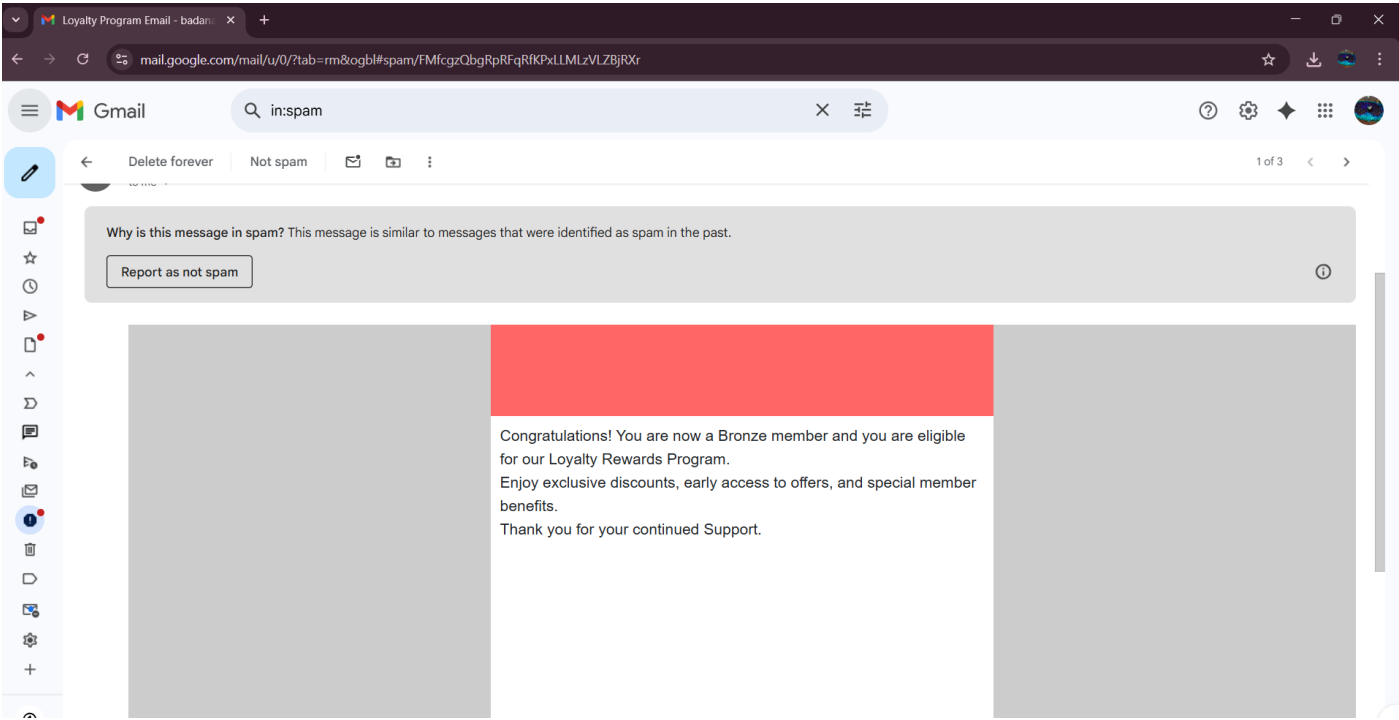
## Email : Order Confirmation



## Email : Low Stock Alert Email



Email : Loyalty Status Email



Custom Object Fields – HandsMen Threads

This document outlines all key fields created under each custom object in Salesforce for the HandsMen Threads project.

HandsMen Customer

Field Label	Type	Notes
Email	Email	—
Phone	Phone	—
Loyalty_Status__c	Picklist	Bronze, Silver, Gold
Total_Purchases__c	Number	—

SETUP > OBJECT MANAGER

HandsMen Customer

Details	<div>Fields &amp; Relationships</div> <div>11 Items, Sorted by Field Label</div> <div>Q Quick Find</div> <div>NewDeleted FieldsField DependenciesSet History Tracking</div>			
Fields & Relationships	Email	Email__c	Email	
Page Layouts	FirstName	FirstName__c	Text(18)	
Lightning Record Pages	Full_Name__c	Full_Name__c_c	Formula (Text)	
Buttons, Links, and Actions	HandsMen Customer Name	Name	Text(80)	✓
Compact Layouts	Last Modified By	LastModifiedById	Lookup(User)	
Field Sets	LastName	LastName__c	Text(18)	
Object Limits	Loyalty Status	Loyalty_Status__c	Picklist	
Record Types	Owner	OwnerId	Lookup(User,Group)	✓
Related Lookup Filters	Phone	Phone__c	Phone	
Search Layouts	Total_Purchases	Total_Purchases__c	Number(18, 0)	
List View Button Layout				
Restriction Rules				
Scoping Rules				

HandsMen Product

Field Label	Type
SKU	Text
Price	Currency
Stock_Quantity__c	Number

SETUP > OBJECT MANAGER

HandsMen Product

Details	<div>Fields &amp; Relationships</div> <div>8 Items, Sorted by Field Label</div> <div>Q Quick Find</div> <div>NewDeleted FieldsField DependenciesSet History Tracking</div>				
Fields & Relationships	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Created By	CreatedById	Lookup(User)		
Lightning Record Pages	HandsMen Product Name	Name	Text(80)		✓
Buttons, Links, and Actions	Last Modified By	LastModifiedById	Lookup(User)		
Compact Layouts	Order	Order__c	Lookup(HandsMen Order)		✓
Field Sets	Owner	OwnerId	Lookup(User,Group)		✓
Object Limits	Price	Price__c	Currency(18, 0)		
Record Types	SKU	SKU__c	Text(80)		
Related Lookup Filters	Stock Quantity	Stock_Quantity__c	Number(18, 0)		
Search Layouts					
List View Button Layout					
Restriction Rules					

## HandsMen Order

Field Label	Type
Order_Number (Record Name)	Text
Status	Picklist
Quantity__c	Number
Total_Amount__c	Number

SETUP > OBJECT MANAGER

### HandsMen Order

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

#### Fields & Relationships

9 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Customer	Customer__c	Lookup(HandsMen Customer)		✓
HandsMen OrderNumber	Name	Auto Number		✓
Last Modified By	LastModifiedById	Lookup(User)		
Order Number	Order_Number__c	Text(18)		
Owner	OwnerId	Lookup(User,Group)		✓
Quantity	Quantity__c	Number(18, 0)		
Status	Status__c	Picklist		
Total Amount	Total_Amount__c	Number(18, 0)		

## Inventory

Field Label	Type
Auto Number (Record Name)	Auto Number
Warehouse	Text
Stock_Quantity__c	Number

SETUP > OBJECT MANAGER

Inventory

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Fields & Relationships

8 Items, Sorted by Field Label

Q Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Inventory Number	Name	Auto Number		✓
Last Modified By	LastModifiedById	Lookup(User)		
Product	Product__c	Master-Detail(HandsMen Product)		✓
Record Name	Record_Name__c	Auto Number		
Stock Quantity	Stock_Quantity__c	Number(18, 0)		
Stock Status	Stock_Status__c	Formula (Text)		
Warehouse	Warehouse__c	Text(18)		

Marketing Campaign

Field Label	Type
Campaign_Name (Record Name)	Text
Start_Date	Date
End_Date	Date

SETUP > OBJECT MANAGER

Marketing Campaign

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Fields & Relationships

8 Items, Sorted by Field Label

Q Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Campaign_Name	Campaign_Name__c	Text(18)		
Created By	CreatedById	Lookup(User)		
End Date	End_Date__c	Date		
HandsMen Customer	HandsMen_Customer__c	Lookup(HandsMen Customer)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Marketing Campaign Number	Name	Auto Number		✓
Owner	OwnerId	Lookup(User,Group)		✓
Start Date	Start_Date__c	Date		

## Custom Objects – HandsMen Threads

Below are the custom objects created in the Salesforce Developer Org for HandsMen Threads:

### 1. HandsMen Customer

Object to store customer data such as:

1. Full Name
2. Email
3. Phone Number
4. Loyalty Tier
5. Total Purchase Amount

SETUP > OBJECT MANAGER					
HandsMen Customer					
Details	<b>Fields &amp; Relationships</b> 4 Items, Sorted by Field Label				
<b>Fields &amp; Relationships</b>	<div>Q Quick Find</div> <div>NewDeleted FieldsField DependenciesSet History Tracki</div>				
Page Layouts	<b>FIELD LABEL</b>	<b>FIELD NAME</b>	<b>DATA TYPE</b>	<b>CONTROLLING FIELD</b>	<b>INDEXED</b>
Lightning Record Pages	Created By	CreatedById	Lookup(User)		
Buttons, Links, and Actions	HandsMen Customer Name	Name	Text(80)		✓
Compact Layouts	Last Modified By	LastModifiedById	Lookup(User)		
Field Sets	Owner	OwnerId	Lookup(User,Group)		✓
Object Limits					

### 2. HandsMen Product

Used to manage product listings:

1. Product Name
2. Category
3. Price
4. SKU
5. Stock Quantity

SETUP > OBJECT MANAGER

HandsMen Product

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Fields & Relationships

4 Items, Sorted by Field Label

Q Quick Find

NewDeleted FieldsField DependenciesSet History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
HandsMen Product Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

### 3. HandsMen Order

Used to capture orders placed by customers:

- Order ID
- Customer (Lookup)
- Product (Lookup)
- Quantity
- Total Amount
- Order Date

SETUP > OBJECT MANAGER

HandsMen Order

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Fields & Relationships

4 Items, Sorted by Field Label

Q Quick Find

NewDeleted FieldsField DependenciesSet History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
HandsMen OrderNumber	Name	Auto Number		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

### 4. Inventory

Tracks current stock levels:

- Product (Lookup)
- Available Stock
- Reorder Threshold
- Last Restock Date

SETUP > OBJECT MANAGER

Inventory

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Details

Description

API Name

Inventory\_\_c

Custom

✓

Singular Label

Inventory

Plural Label

Inventories

Enable Reports

✓

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

EditDelete

5. Marketing Campaign

Used for campaign planning and tracking:

1. Campaign Name
2. Target Audience
3. Start Date
4. End Date
5. Budget
6. Status

SETUP > OBJECT MANAGER

Marketing Campaign

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Details

Description

API Name

Marketing\_Campaign\_\_c

Custom

✓

Singular Label

Marketing Campaign

Plural Label

Marketing Campaigns

Enable Reports

✓

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

EditDelete

Custom Tabs – HandsMen Threads

To ensure easy access and navigation for end users, custom tabs were created for each of the following custom objects:

1. HandsMen Customer
2. HandsMen Product



3. HandsMen Order
4. Inventory
5. Marketing Campaign

These tabs allow users to view, create, and manage records directly from the navigation menu in the Lightning App.

## Validation Rules – HandsMen Threads

This document outlines the key validation rules implemented to maintain data integrity across custom objects in the Salesforce HandsMen Threads project.

### HandsMen Order

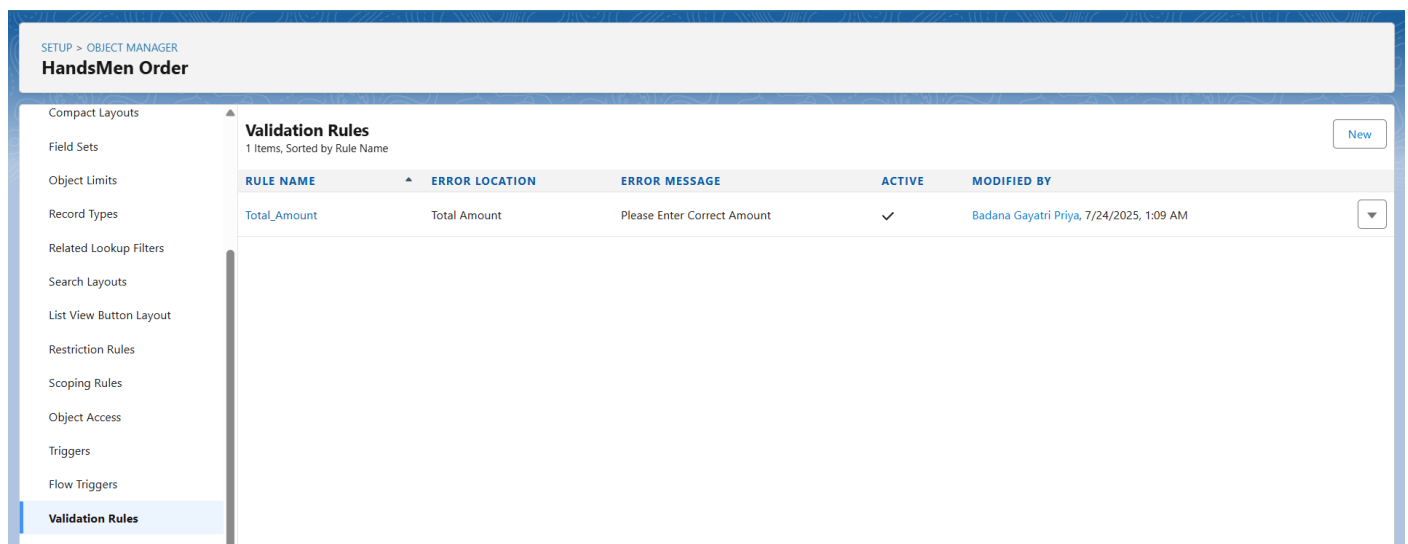
**Object:** HandsMen\_Order\_\_c

**Field:** Total\_Amount\_\_c

**Purpose:** Prevent saving orders with total amount less than or equal to zero.

#### Validation Rule:

Total\_Amount\_\_c <= 0



The screenshot shows the Salesforce Object Manager interface for the 'HandsMen Order' object. The left sidebar contains a navigation menu with options like Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, Object Access, Triggers, Flow Triggers, and Validation Rules. The main area displays the 'Validation Rules' section for 'HandsMen Order', showing 1 item sorted by Rule Name. A table lists the validation rule with columns: Rule Name, Error Location, Error Message, Active status, and Modified By.

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Total_Amount	Total Amount	Please Enter Correct Amount	✓	Badana Gayatri Priya, 7/24/2025, 1:09 AM

Inventory Object: Inventory\_\_c Field: Stock\_Quantity\_\_c Purpose: Prevent saving inventory records with zero or negative stock values.

Validation Rule: Stock\_Quantity\_\_c <= 0

SETUP > OBJECT MANAGER

### Inventory

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

**Validation Rules**

**Validation Rules**  
1 Items, Sorted by Rule Name

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Stock_Quantity	Top of Page	the inventory count is never less than zero.	✓	Badana Gayatri Priya, 7/24/2025, 1:11 AM

HandsMen Customer Object: HandsMen\_Customer\_\_c Field: Email Purpose: Ensure that only Gmail addresses are allowed for customer emails.

Validation Rule: NOT CONTAINS(Email, "@gmail.com")

SETUP > OBJECT MANAGER

### HandsMen Customer

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

**Validation Rules**

**Validation Rules**  
1 Items, Sorted by Rule Name

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Email	Top of Page	Please fill Correct Gmail	✓	Badana Gayatri Priya, 7/24/2025, 1:12 AM

## Profile Setup – HandsMen Threads

This document outlines the steps taken to configure a custom profile with appropriate object-level access for the HandsMen Threads project.

### Profile: Sales

#### Steps Taken:

1. Go to **Setup → Profiles**
2. Cloned the profile: Custom: Sales Profile

3. Renamed it to: **Platform 1**
4. Clicked **Edit** on the new profile
5. Under **Custom Object Permissions**, provided access to:

Object	Read	Create	Edit
HandsMen Product	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Inventory	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Saved the changes

### Role Hierarchy – HandsMen Threads

This document outlines the role hierarchy created in Salesforce to manage data access across key departments: Sales, Inventory, and Marketing.

### Roles Created

Role Name	Description
Sales	Users handling customer interactions and orders
Inventory	Warehouse and stock management users
Marketing	Users managing campaigns, offers, and promotions

---

### Steps to Create Roles

1. Go to **Setup**
2. Search for **Roles** in the Quick Find box
3. Click **Set Up Roles**
4. Click **Add Role** under **CEO**

## 5. Create roles:

Field	Value
Role Name	Sales
Role Name	Inventory
Role Name	Marketing

Save each role after creation

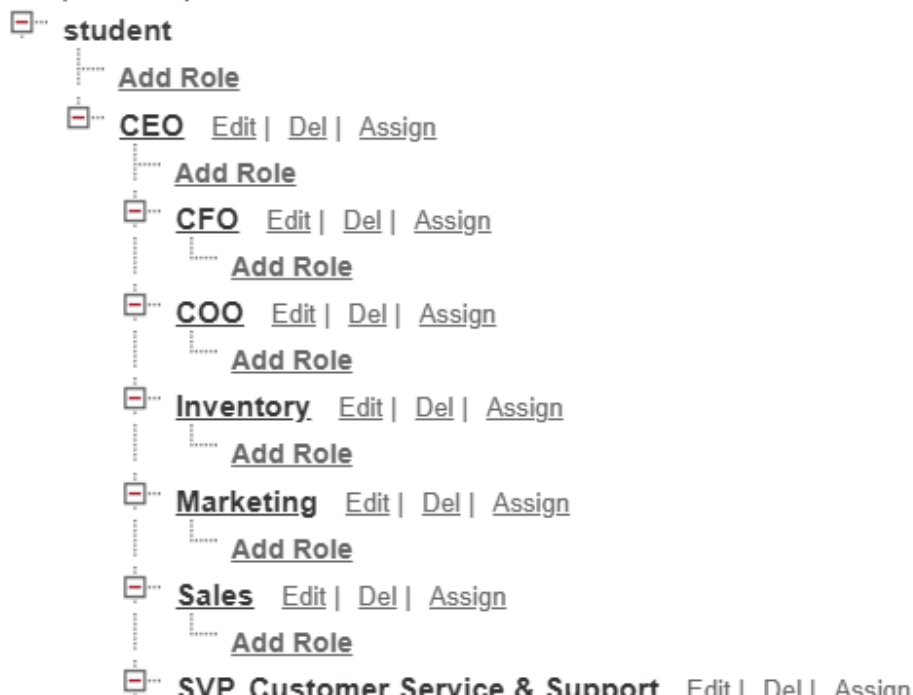
## Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

### Your Organization's Role Hierarchy

---

[Collapse All](#) [Expand All](#)



Role-based access control is now in place to maintain data segregation across different departments.

### User Setup – HandsMen Threads

This document lists the Salesforce users created for the project and their assigned profiles and roles.

## Users Created

First Name	Last Name	Username	Profile	Role
Niklaus	Mikaelson	priya@priya.priya	Sales	Sales
Kol	Mikaelson	priya1 @priya1.priya1	Platform1	Inventory
Daniel	Mikaelson	Priya2@priya2.priya2	Platform1	Inventory

Setup

Home

Object Manager

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector

Users

Didn't find what you're looking for?

Try using Global Search.

Search Setup

Users

All Users

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. Let's Go

View: All Users Edit Create New View

New User

Reset Password(s)

Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d9k000007rybxuac.u87ceim96lv@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	EPIC_OrgFarm	OEPIG	epic.590711f5130b@orgfarm.salesforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	Gayatri Priya_Badana	322	322103282007.gayatri820@agentforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	Mikaelson_Daniel	dmika	priya2@priya2.priya2	Marketing	<input checked="" type="checkbox"/>	Platform 1
<input type="checkbox"/> Edit	Mikaelson_Kol	kmika	priya1@priya1.priya1	Inventory	<input type="checkbox"/>	Platform 1
<input type="checkbox"/> Edit	Mikaelson_Niklaus	nmika	priya@priya.priya	Sales	<input checked="" type="checkbox"/>	Platform 1
<input type="checkbox"/> Edit	User_Integration	Integ	integration@00d9k000007rybxuac.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00d9k000007rybxuac.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

New User

Reset Password(s)

Add Multiple Users

## Permission Set – HandsMen Threads

This document describes the configuration of the custom permission set used to grant object-level access to users with restricted profiles.

### Permission Set: Permission\_Platform\_1

#### Purpose:

To grant full access (read, create, edit, delete) to key custom objects required by Platform 1 users (e.g., Niklaus).

## Object Permissions Granted

Object	Read	Create	Edit	Delete
HandsMen Customer	✓	✓	✓	✓
HandsMen Order	✓	✓	✓	✓

**Note:** Standard objects like Order were excluded due to the Salesforce Platform license limitation.

## Assigned To

Username	Profile	Role
Niklaus	Platform 1	Sales

## Summary

1. Permission set successfully created and assigned
2. Users can fully interact with necessary custom objects
3. Validated under the Salesforce Platform license without errors

## **Conclusion**

The HandsMen Threads Salesforce CRM implementation delivers a powerful and scalable solution to streamline men's fashion tailoring operations. By leveraging Salesforce's declarative and programmatic features, the project effectively addressed key business challenges and achieved the following outcomes:

- Centralized and structured data model for seamless business tracking
- Enhanced customer experience through automated communication and loyalty updates
- Inventory efficiency with real-time alerts and scheduled batch updates
- Strong role-based access control to ensure secure data handling across teams
- Reusable flows, validations, and templates that support scalability and future expansion

Overall, this CRM transformation positions HandsMen Threads for operational excellence and sustained growth in the competitive fashion industry.