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

ABSTRACT

HandsMen Threads is dedicated to elevating the art of sophistication in men's fashion, creating a unique shopping experience that resonates with our customers. To achieve this, we leverage Salesforce CRM to enhance our business processes and foster meaningful relationships with our clients.

The project involves building a robust data model featuring five key custom objects: Customer, Order, Products, Inventory and Marketing Campaign.In business process it is automated using Record-Triggered Flows, Scheduled Flows, Email Alerts, and Apex which handles the order confirmation, loyalty status and stock alerts.
To ensure that it is reliable validation rules were establish.

Salesforce CRM empowes us to create a more engaging and personalized experience for our customers, fostering loyalty and driving growth on our business.

OBJECTIVES

The following are the purpose of the project:

- Automated order confirmation
- Ensure accurate and consistent data
- Dynamic Loyalty Program
- Scheduled Bulk Order Updates

TECHNOLOGY DESCRIPTION

Salesforce is a cloud-based software company, primarily known for its Customer Relationship Management (CRM) platform, but also offering a wide range of other business solutions. It helps businesses manage customer data, sales, marketing, and service operations. Essentially, it's a suite of tools designed to improve how companies interact with their customers and streamline their business processes.

Custom Objects Track and store data that's unique to your organization.

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

Profiles are used to manage user permissions and access settings, essentially defining what users can do within the system.

Roles define a user's position within the organization's hierarchy and determine their level of access to data.

 Permission sets are collections of settings and permissions that extend a user's access to various tools and functions beyond what's defined in their profile.

Validation rules are a powerful tool for enforcing data quality by ensuring that data entered into Salesforce meets specific criteria before a record is saved.

Email templates allow users to create pre-defined email messages that can be easily inserted into emails, streamlining communication and saving time.

Email alerts are automated notifications sent via email when specific conditions are met within the Salesforce platform.
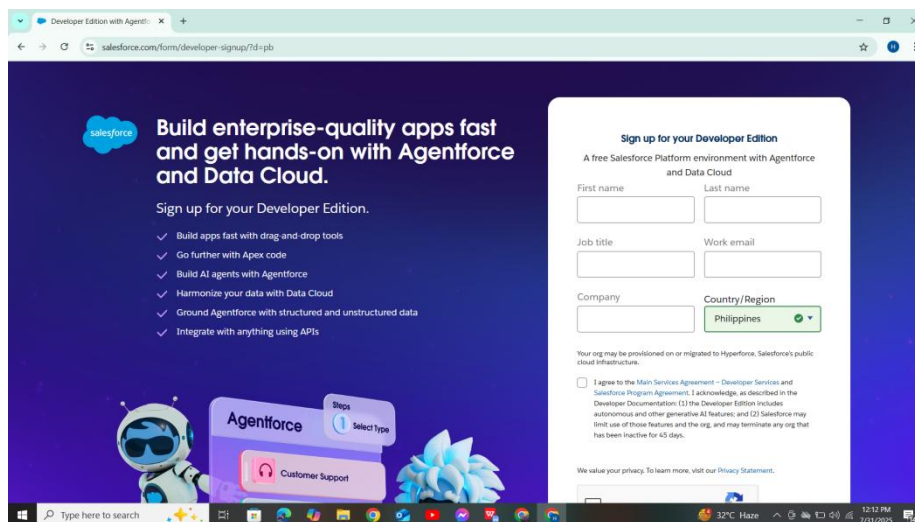
 Flow to automate processes for every app, experience, and portal with declarative tools.

Apex is a strongly typed, object-oriented programming language that allows developers to execute flow and transaction control statements on Salesforce.

Detailed Execution Of Project Phases

I. Developer Org Setup

- https://developer.salesforce.com/signup

II. Custom Object Creation

- HandsMen Customer

- HandsMen Product

- HandsMen Order

- Inventory

- Marketing Campaign

Steps Followed:

- Setup→Object Manager→Create→Custom Oject

- Provided label, name, and enabled reports/search

- Saved and Create tabs for each object

III. Creating Lightning App

- HandsMen Threads Lightning App was created

- Included tabs: HandsMen Customer, Order, Product, etc
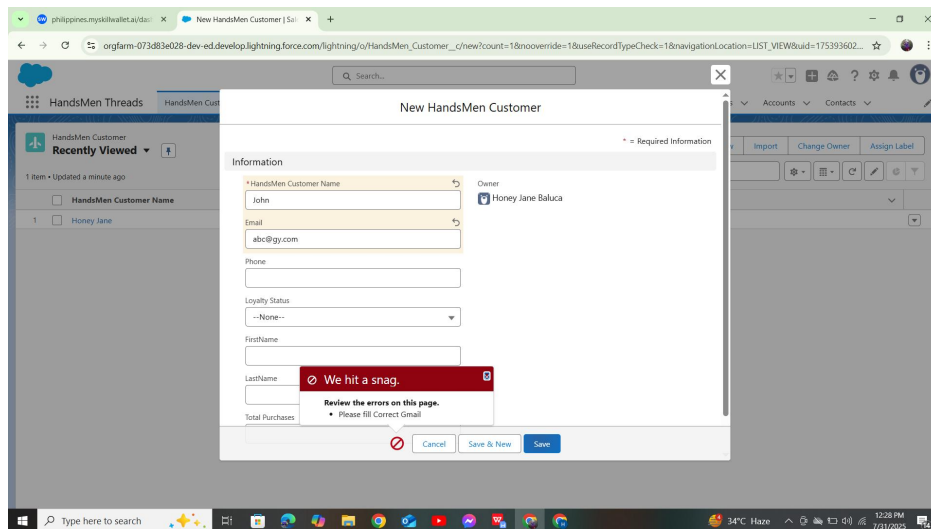
- Assigned to the System Administrator profile

IV. Validation Rules

- Order Object: Prvents saving if Total_Amount_c<=0.

Error:"Please Enter Correct Amount"

- Customer Object: Validates email contains @gmail.com.

Error:"Please fill correct Gmail"

V. User Role & Profile Setup

- Cloned the standard user profile to a new profile named Platfom 1 and access to necessary custom objects.
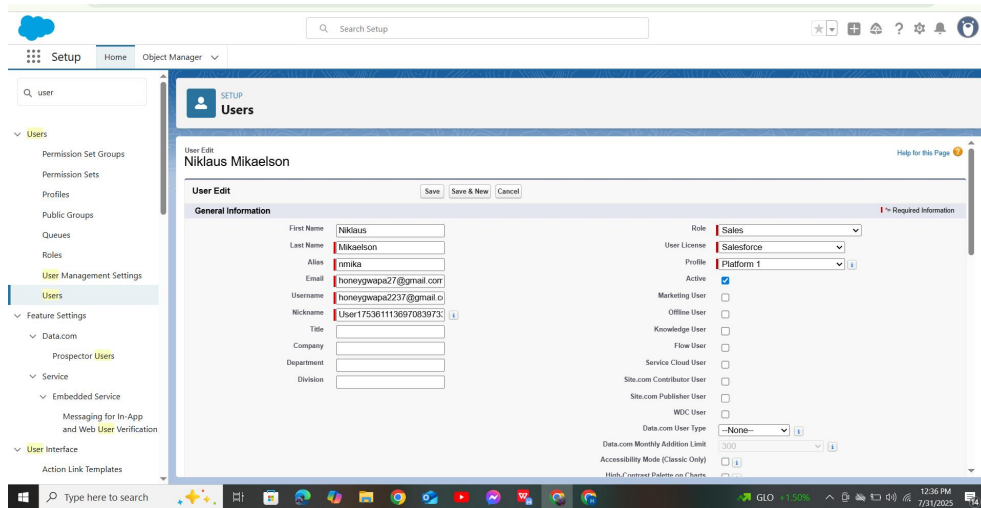
- Created roles for different departments:

-Sales Manager, Inventory Manager, Marketing Team

VI.User Creations

Users were created in Salesforce and assigned appropriate roles and profiles to reflect their responsibilities:

- Niklaus Mikaelson- Assigned the Sales role

- Kol Mikaelson - Assigned to Inventory role

VII.Email Template & Alert

- Order Confirmation - Sent on order status = Confirmed

- Low Stock Alert - Sent when Inventory < 5 units

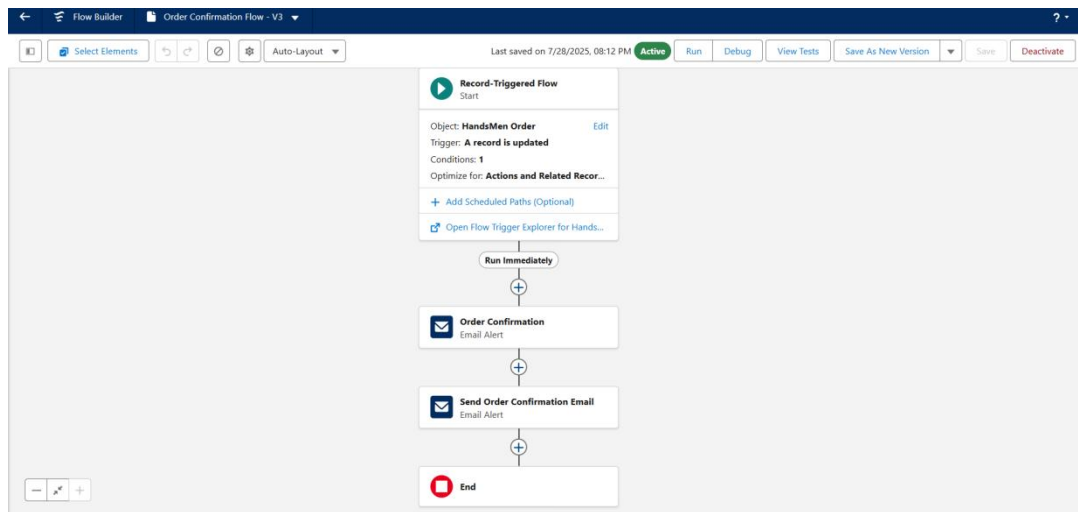- Loyalty Program Email - Sent when loyalty status changes
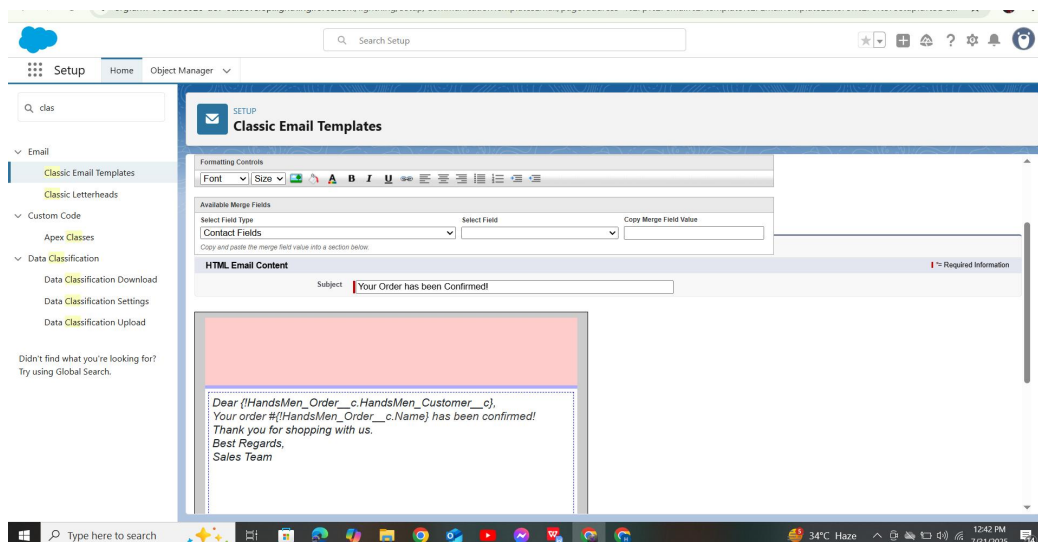
VIII. Flow Implementation

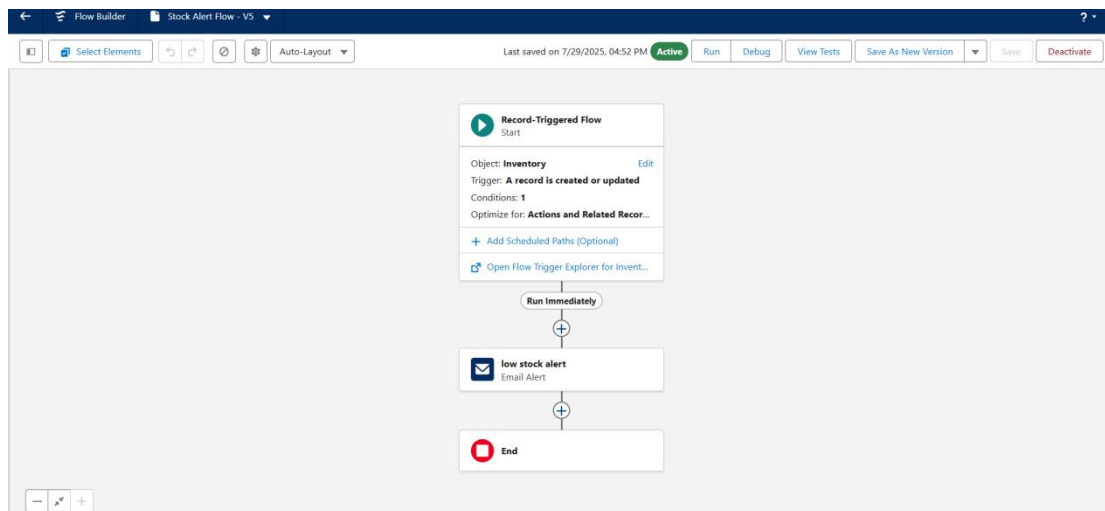### A. Order Confirmation Flow

- Triggered when an order is updated or confirmed.

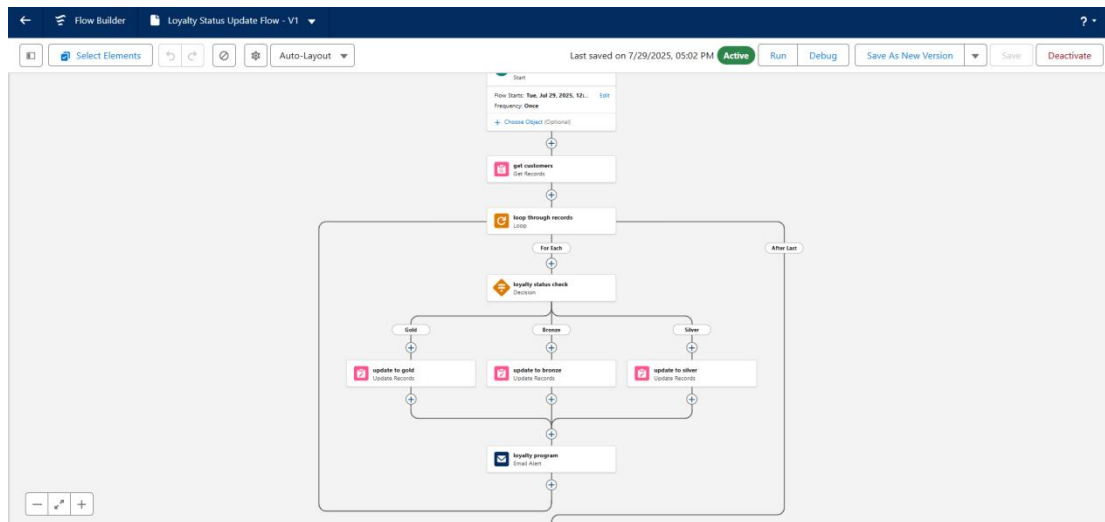● Sends an Order Confirmation email to the related customer.

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.

IX.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.
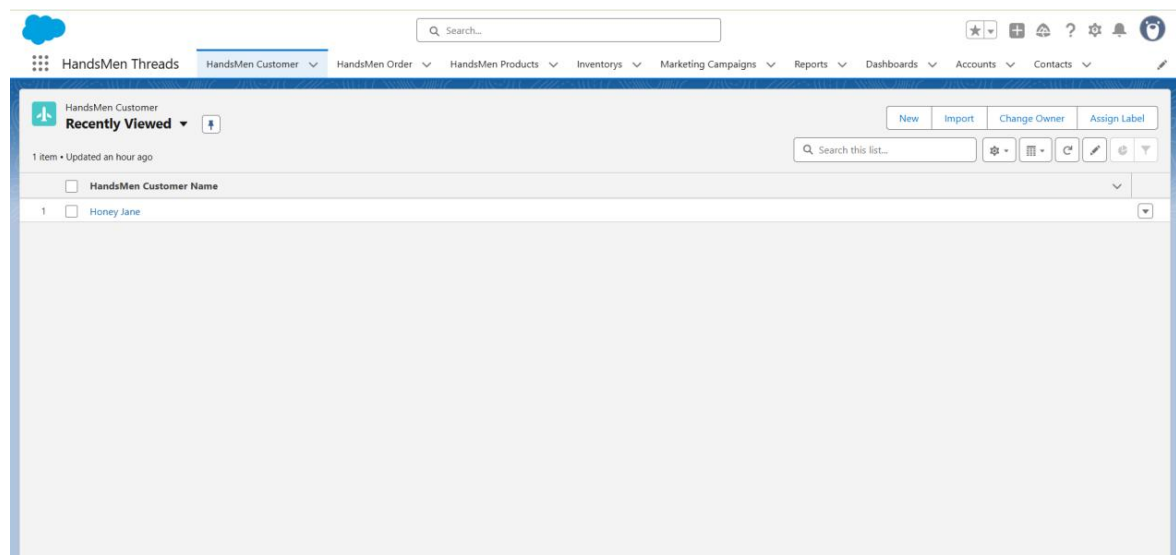● Loyalty Status Trigger: Updates Loyalty Status based on total purchases.

SCREENSHOTS
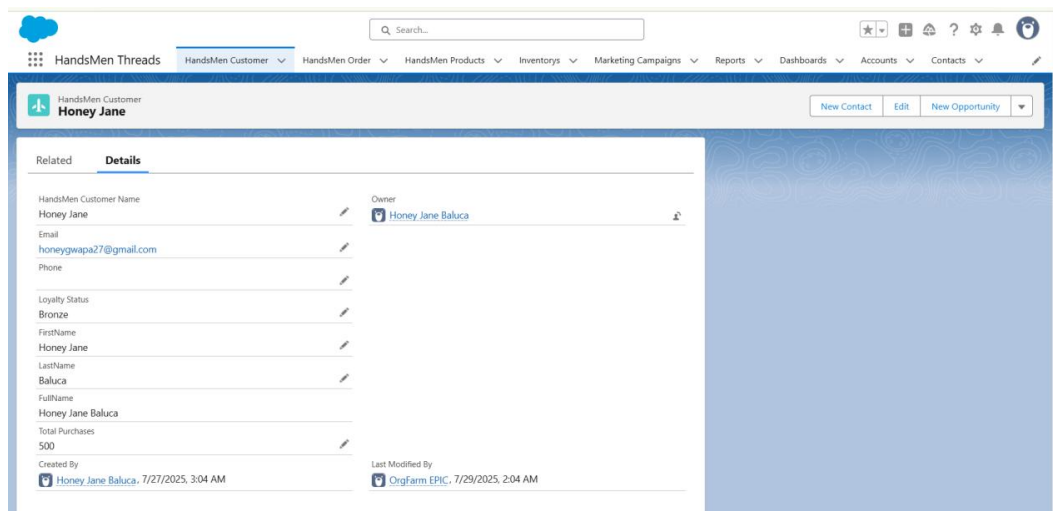

Figure 1: Custom App for HandsMen Threads

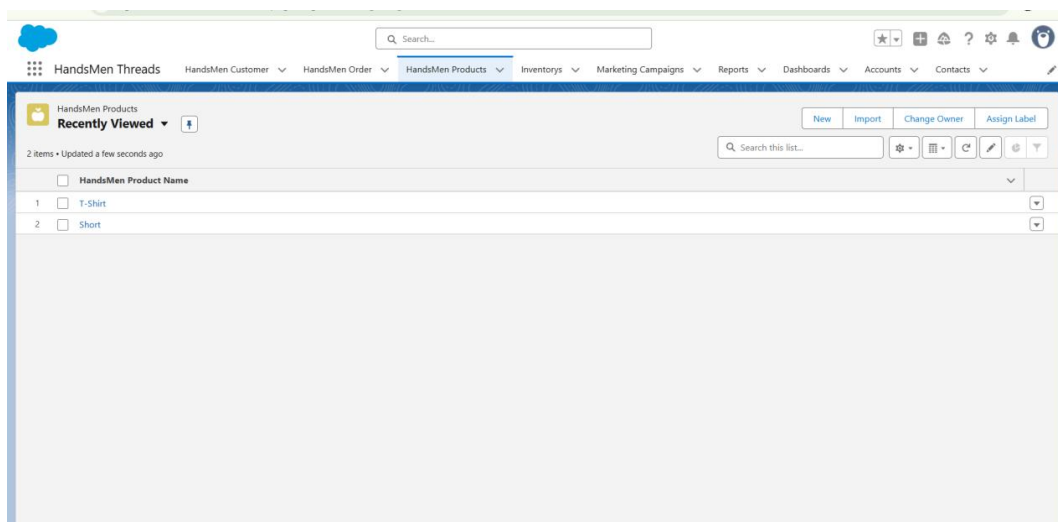**Figure 2: Customer Creation in HandsMen Threads**

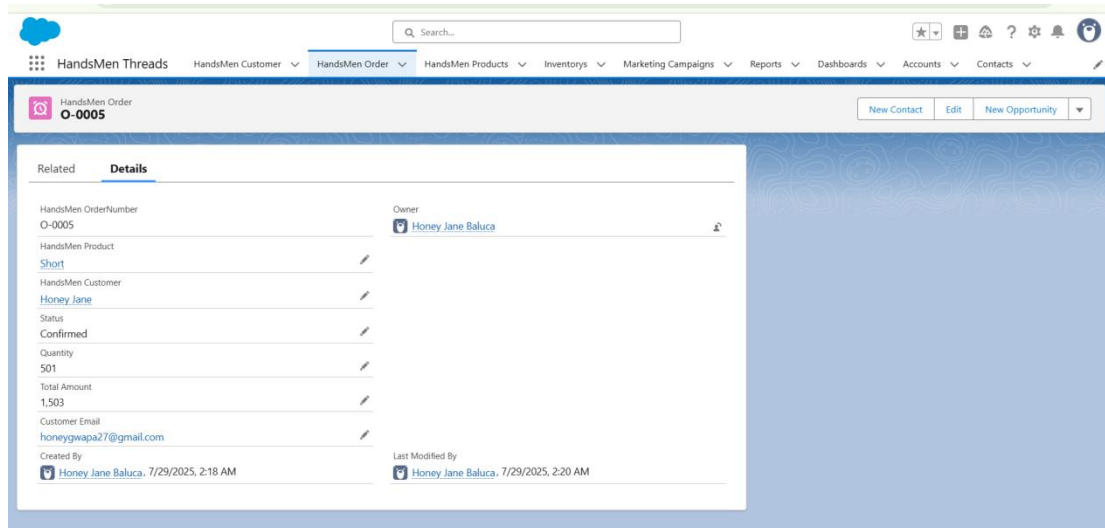**Figure 3: Products in HandsMen Threads**

Figure 4 : Order Confirmation

CONCLUSION

HandsMen Threads CRM system built on Salesforce helps businesses and customers facilitate their orders, queries with less hassle. By leveraging salesforce tools like Custom Objects, Flows, Validation, Email Alerts, and Apex, the system ensures reliable and accurate data to help enhance customers experience.