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

Abstract

The specially created Salesforce CRM for HandsMen Threads served as the project's central component. It was created to improve client interaction, expedite data transfer, and automate essential corporate processes. Instant order updates, inventory notifications, loyalty program management, and automated finance reporting are all integrated into the system. Data integrity is directly maintained through the user interface (UI) thanks to a fundamental design principle, which is essential for dependable, consistent business performance.

Introduction

A single system for managing critical business areas—specifically, customer data, sales, inventory, and communication—was crucial for HandsMen Threads' ongoing success because the company operates in a dynamic, customer-centric market. Because of Salesforce CRM's reputation for scalability and flexibility, they chose it. The project required extensive use of the platform, integrating features such as standard objects (dashboards, reports), custom objects, different automation tools (triggered and scheduled processes, validation rules), and strong communication features (email alerts and templates).

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 single, cloud-based platform that gives companies the tools they need to manage customer interactions, streamline operations, and accomplish growth. These tools cover sales, service, marketing, and analytics. Salesforce CRM, the primary product, is an essential tool for monitoring client interactions, automating critical processes, and customizing engagement. It makes it easier to convert leads, manage deals more effectively, and provide better service by centralizing data throughout the company.

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
- Inventory
- 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.

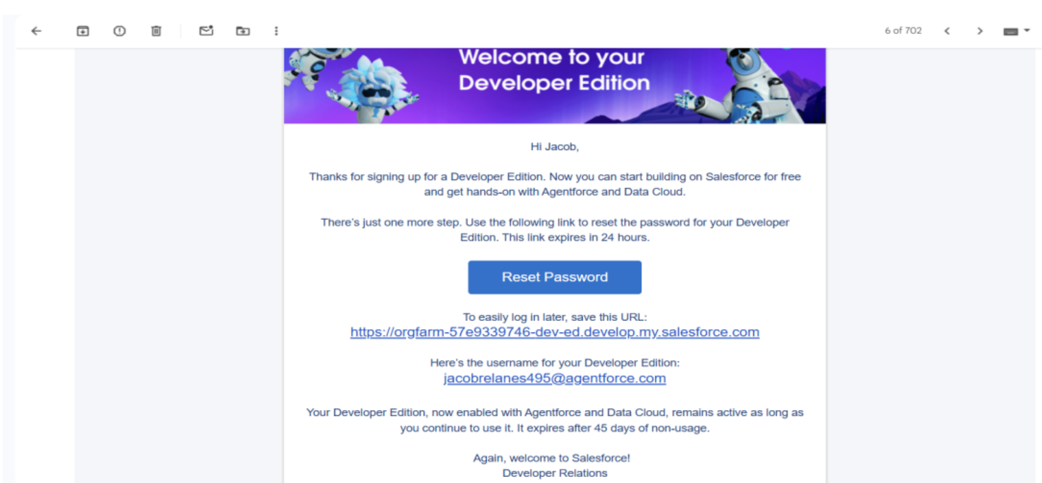
Reports & Dashboards: Visual tools for monitoring orders, stock status, and customer trends.

Detailed Execution of Project Plan

Developer Account Creation/ Setup

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

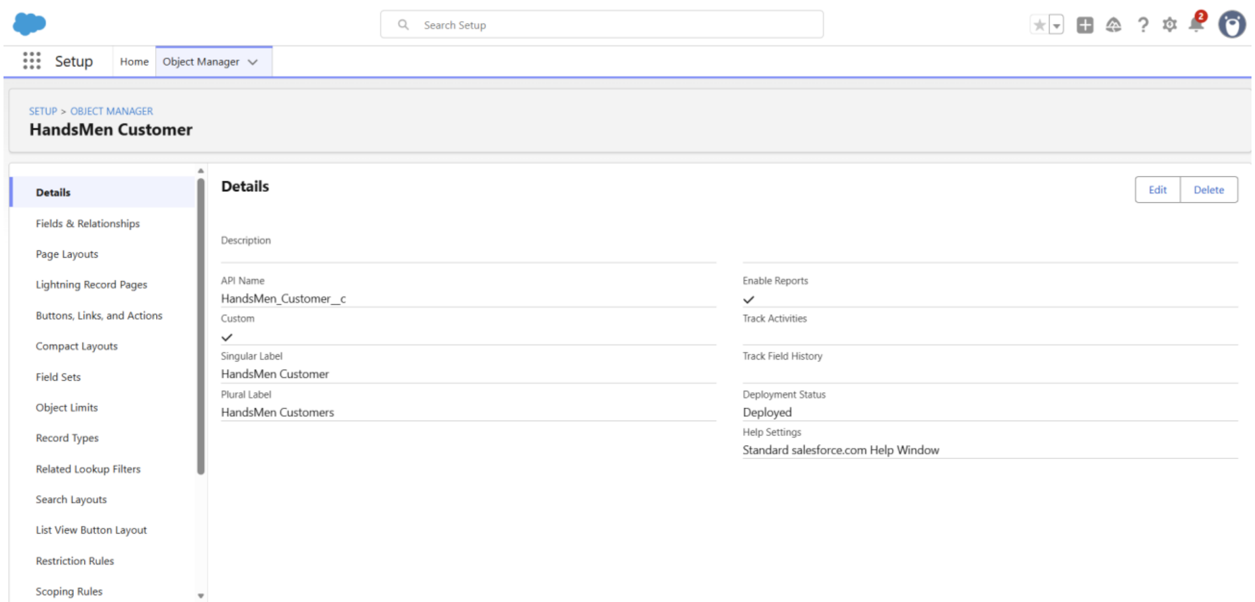
The account was verified by resetting the password, and our Developer Edition Org was successfully created.



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.

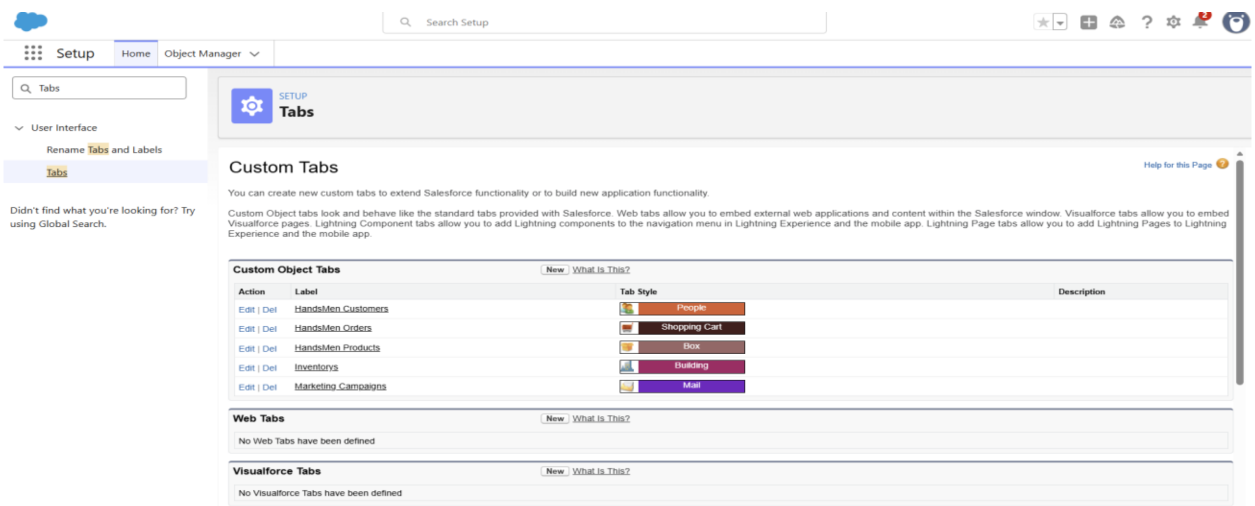
HandsMen Products: This custom object was created to manage the available products.

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

The HandsMen Threads Salesforce CRM makes use of custom tabs to provide quick and easy access to the brand's specialized data models and customized objects. These tabs specifically serve as entry points for managing core operational entities such as orders, customer loyalty status, inventory levels, and critical warehouse notifications.



Tabs Created for these custom objects,

- HandsMen Customers (People)
- Hands Men Orders (Shopping Cart)
- HandsMen Products (Box)
- Inventory (Building)
- Marketing Campaign (Mail)

Data Management – App Manager

To combine all CRM functionalities into a single, consistent interface, a custom Lightning Application called "HandsMen Threads" was created using the Salesforce App Manager. This application is the primary digital workplace for all HandsMen Threads departments (Sales, Inventory, Finance, and Customer Service) and includes all relevant tabs, objects, and components.

Included Tabs:

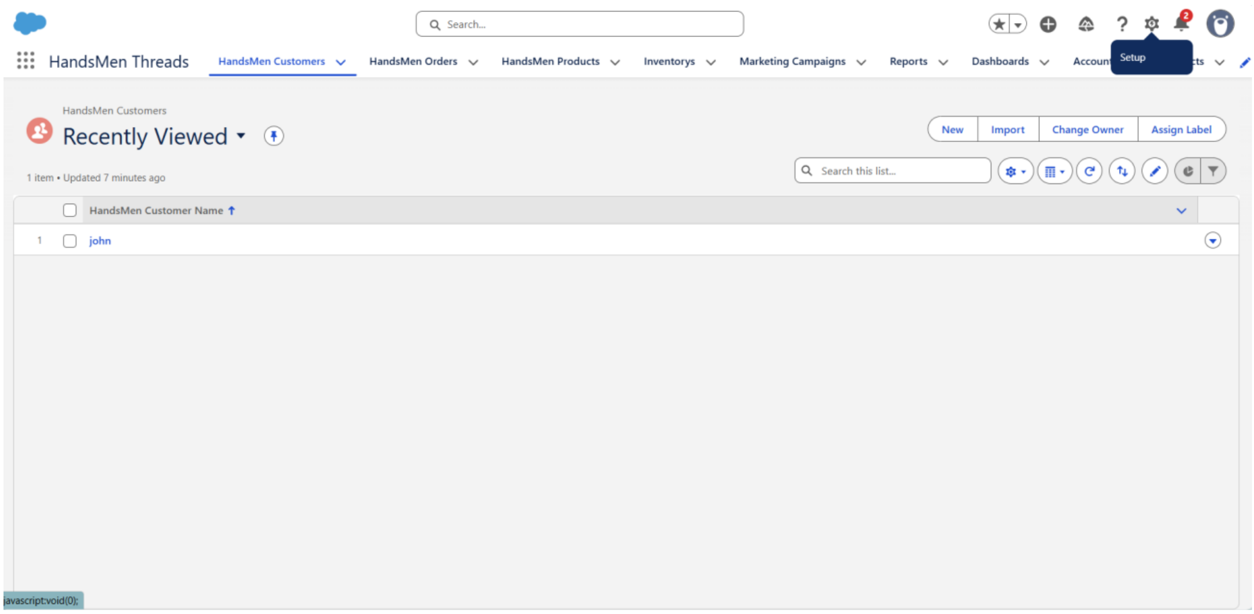
The tabs included were the combination of the custom objects I created and the standard objects received from salesforce. The list of all the objects are below: -

Custom objects

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

Standard objects

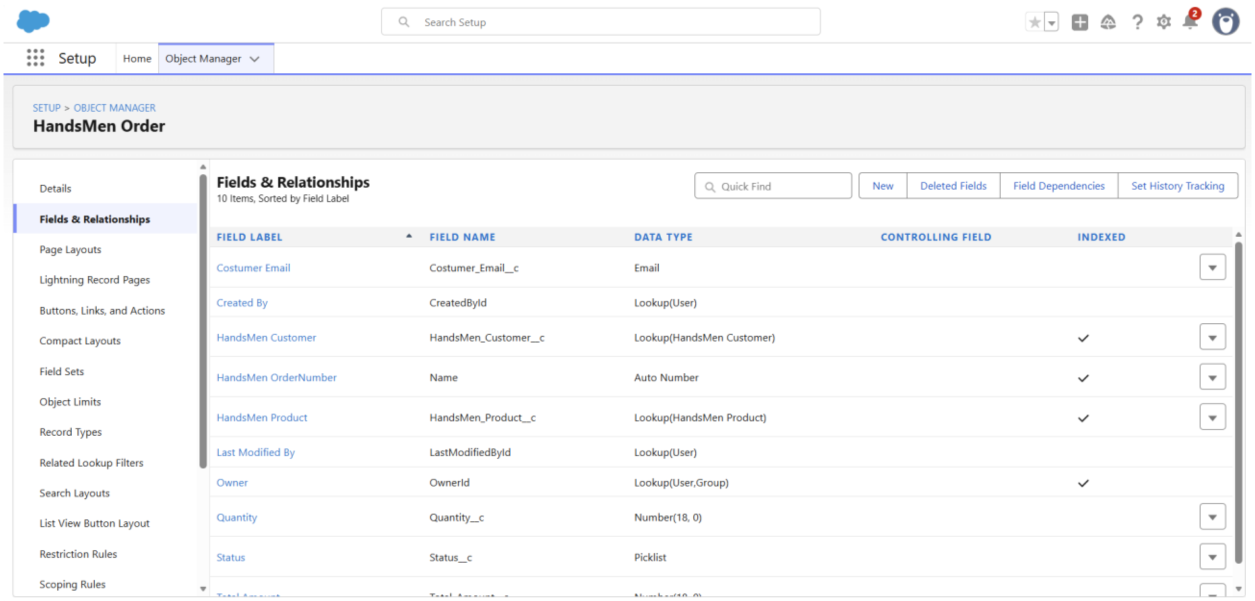
- Reports
- Dashboards



Data Management – Fields

I was expected to add some fields to the right custom objects. The HandsMen Threads CRM system utilizes Custom Objects—specifically designed to represent core business entities like Customers, Orders, Products, and Inventory. To meet the organization's precise operational and data requirements, each object was configured with custom fields. This careful customization ensures that every business process can be accurately captured, tracked, and automated within the Salesforce environment.

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)



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.

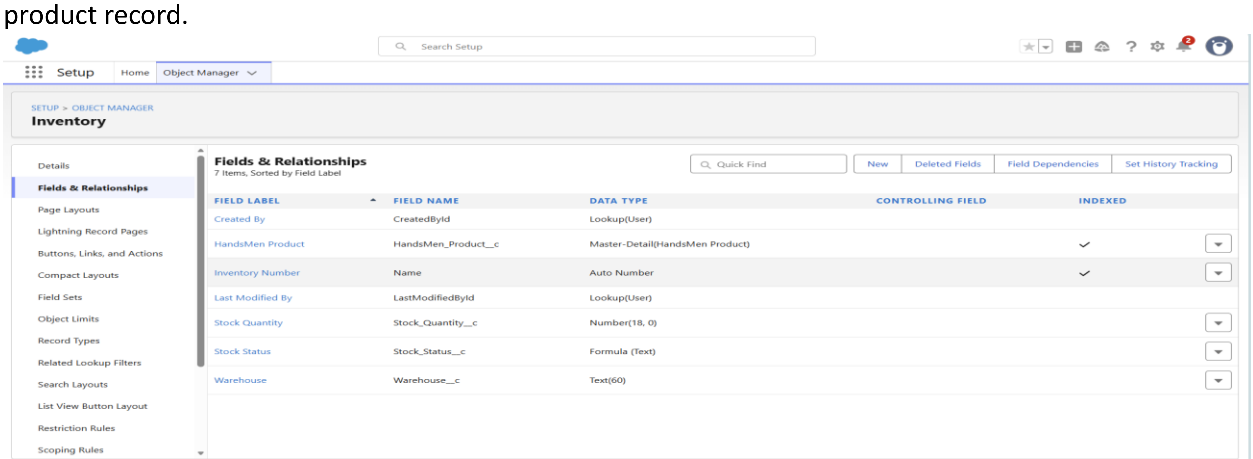
2. Creating lookup relationship between HandsMen order and HandsMen Product.

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 implemented a master-detail relationship between the custom objects to automatically synchronize changes between them upon order confirmation. Specifically, this relationship connects Inventory and HandsMen Product, allowing the system to accurately link and store inventory data to its respective product record.



Creation of Formula Fields

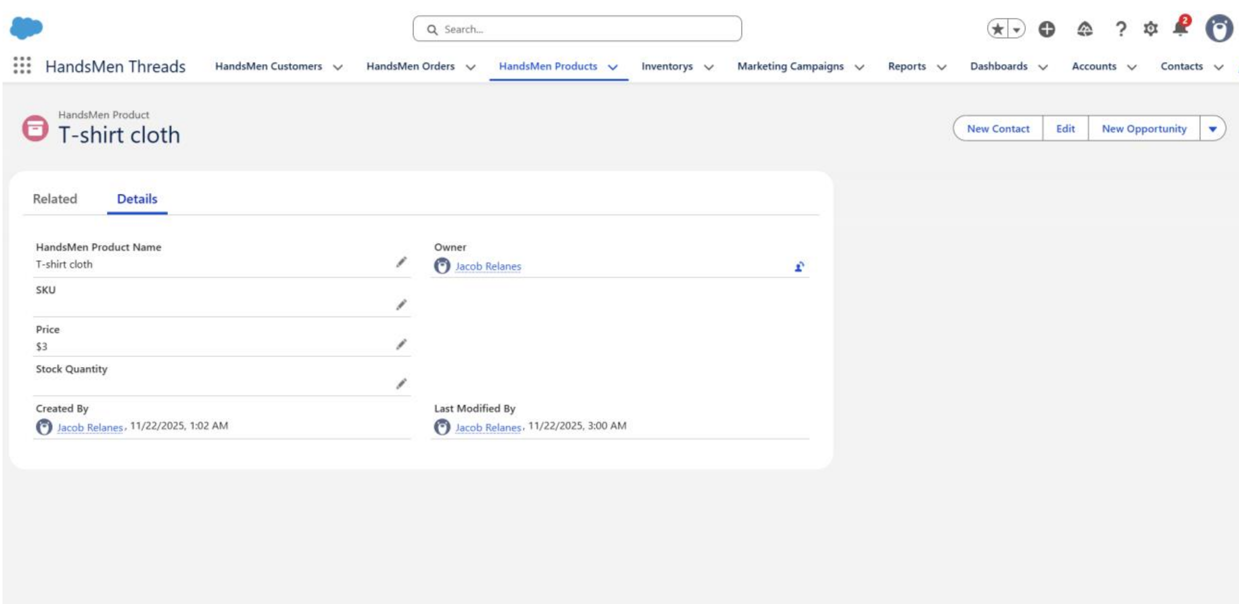
Formula fields were added to the custom objects to improve real-time data visibility and reduce the requirement for manual computations. These fields compute and display data based on specified logic, resulting in increased clarity and automation throughout all business operations.

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:

Stock_Quantity__c <= 0

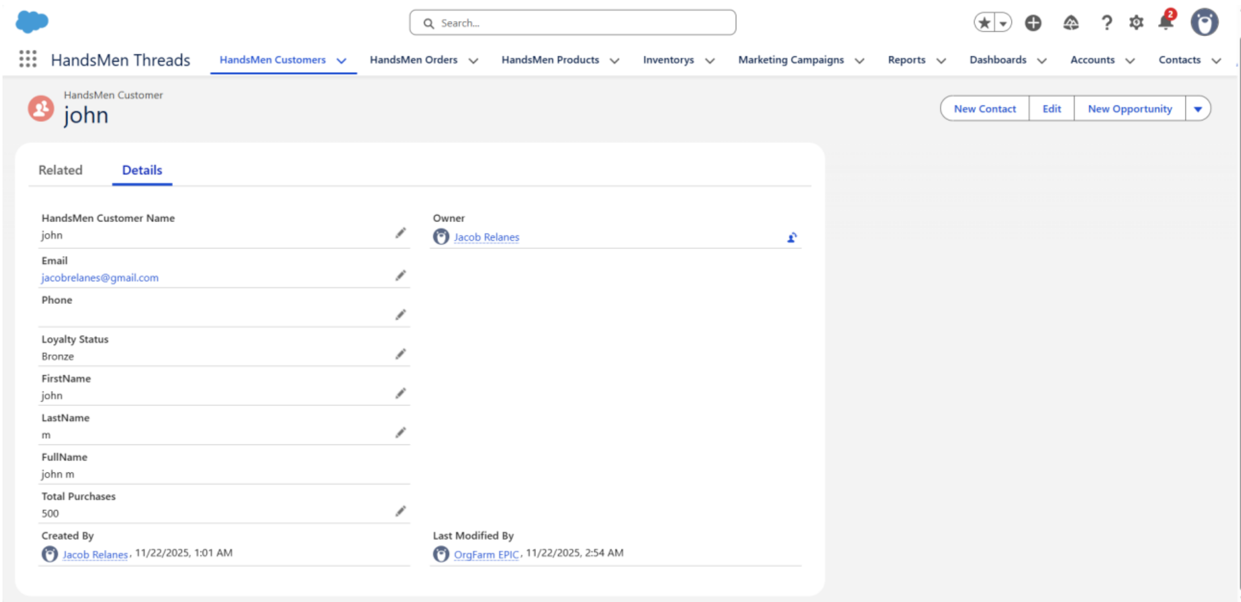


2. HandsMen_Customer__c → Full_Name__c

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

Formula:

FirstName__c + " " + LastName__c



Data Configuration – Validation Rules.

Multiple Validation Rules were implemented across the HandsMen Threads CRM's custom objects to ensure data accuracy, enforce business logic, and proactively prevent errors. These rules are critical for maintaining clean, reliable data and preventing incorrect or illogical records from being processed.

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

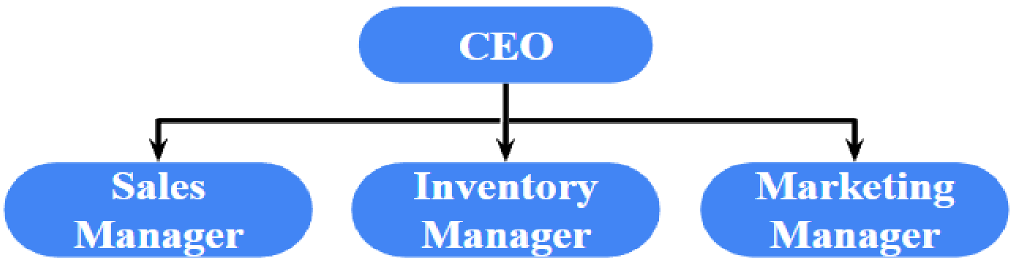
Validation Rule: **“Email”**

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

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

Data Security – Roles

The HandsMen Threads CRM includes a clear role hierarchy that defines data visibility, access permissions, and organizational reporting structure. This framework was created to match the company's real-world activities, allowing for fast team cooperation while rigidly ensuring data segregation and sufficient oversight.



Structure Implemented

At the top of the hierarchy:

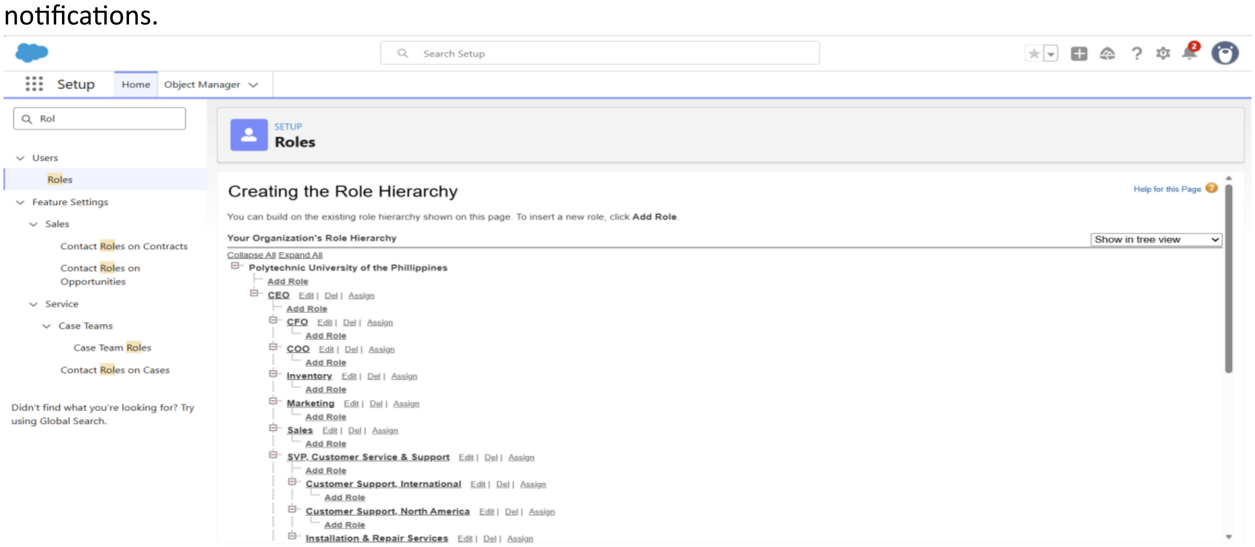
⍰ **CEO (Chief Executive Officer)** – Has visibility into all records and activities across departments.

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

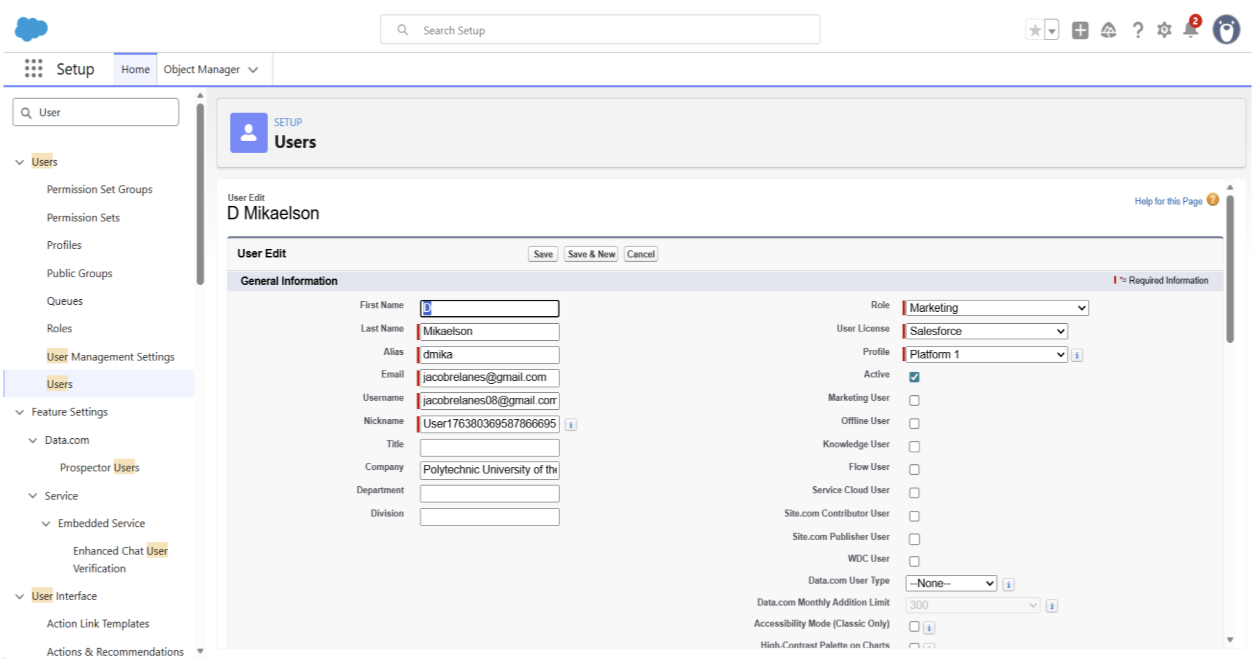
Third user:

Name: D Mikaelson

Role: Marketing

User Licence: Salesforce Platform

Profile: Platform 1



Data Security – Permission Sets

To provide flexible and granular control over data access within the HandsMen Threads CRM, Permission Sets were strategically employed to define object-level privileges for specific departmental roles. This solution reduced the administrative burden of managing several unique profiles while ensuring that each position had secure, role-specific access granted solely through its own permission set.

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

Sales Permission Sets

Full access (Read, Create, Edit, Delete) to Customer**s** 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

Here are a few ways to paraphrase the text:

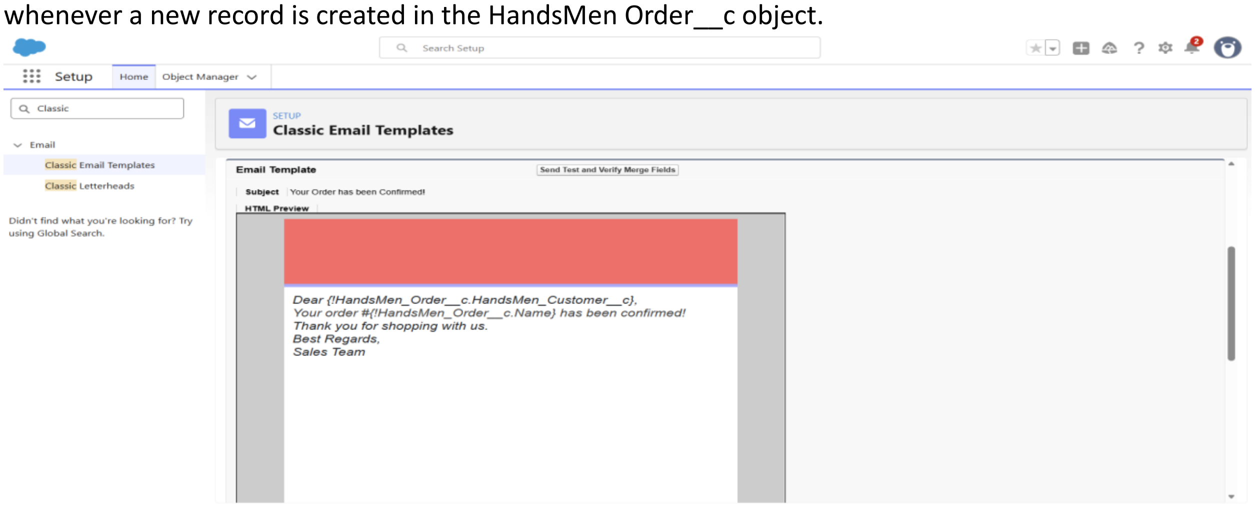
Option 1: Emphasizing Customer Experience and Automation Tool

The quick delivery of order confirmation emails is a critical automatic feature in the HandsMen Threads CRM, which substantially improves the customer experience and develops brand confidence. This functionality was enabled by creating an email template using Salesforce's Classic Email Templates and linking it with an automated process, such as a Flow or Process Builder, for rapid execution.

We created 3 major email templates for our usage:

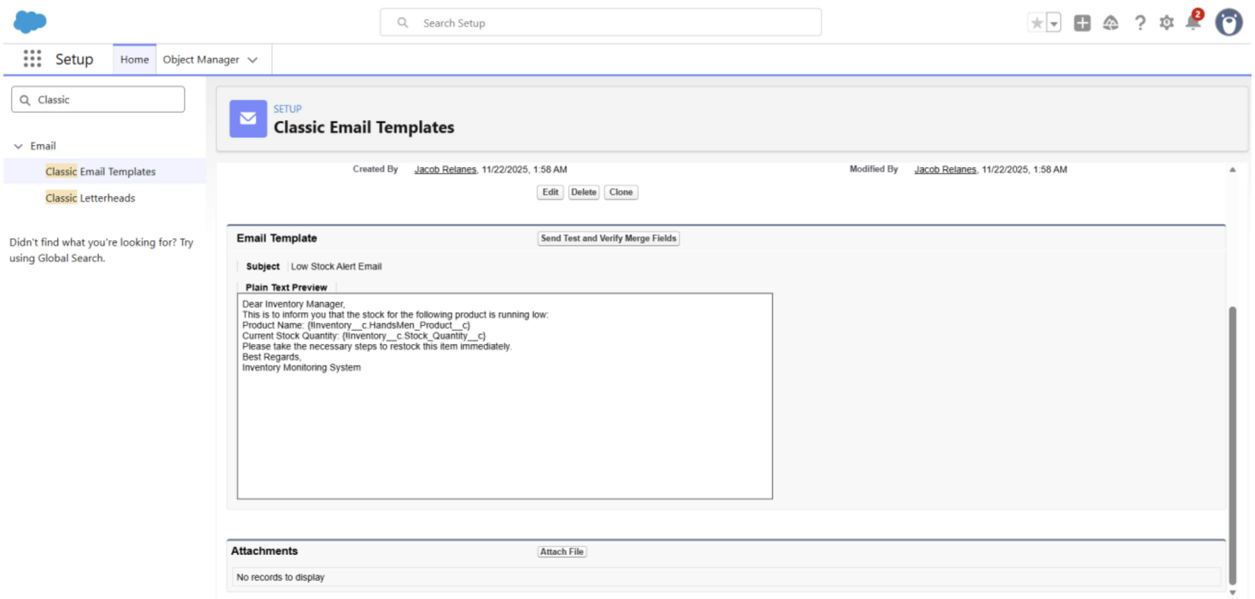
1 . **Order Confirmation Email**

The Order Confirmation Email Template, generated with Salesforce's Classic Email Templates, was linked to an automation tool (such as a Workflow Rule, Process Builder, or Flow) to ensure that the email is sent whenever a new record is created in the HandsMen Order__c object.



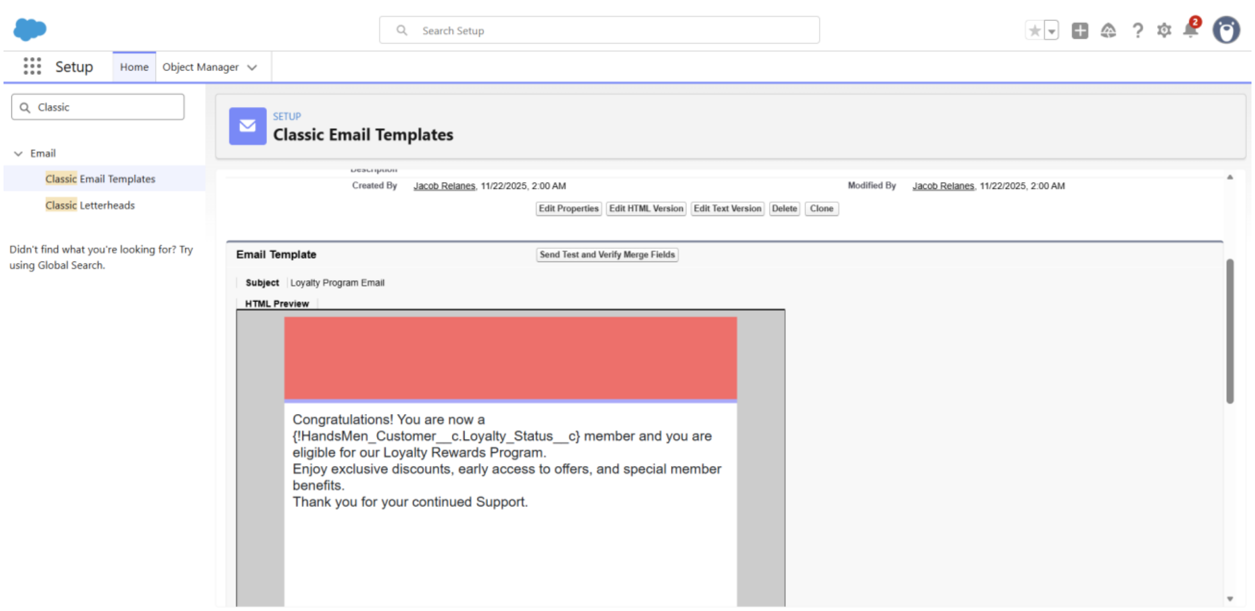
2 . Low Stock Alert:

We created a Low Stock Alert Email system to ensure that inventory operations in the HandsMen Threads CRM ran smoothly. This system proactively warns inventory managers when stock levels fall below a specific threshold, allowing for timely replenishment and minimizing delays in completing client requests.



3 . Loyalty Program Email:

As part of HandsMen Threads' customer retention strategy, a Loyalty Program Email System was implemented in Salesforce CRM. This automated system recognizes and rewards loyal customers by automatically tiering them as Gold, Silver, or Bronze based on their purchase history, and then sends personalized emails informing them of their current status.



Email Alerts

The HandsMen Threads CRM's automation layer uses Email Alerts (based on existing email templates) to ensure timely, real-time communication with the appropriate recipients. These alerts are essential for informing users and customers about key events such as order confirmations, low stock warnings, and changes to loyalty program status.

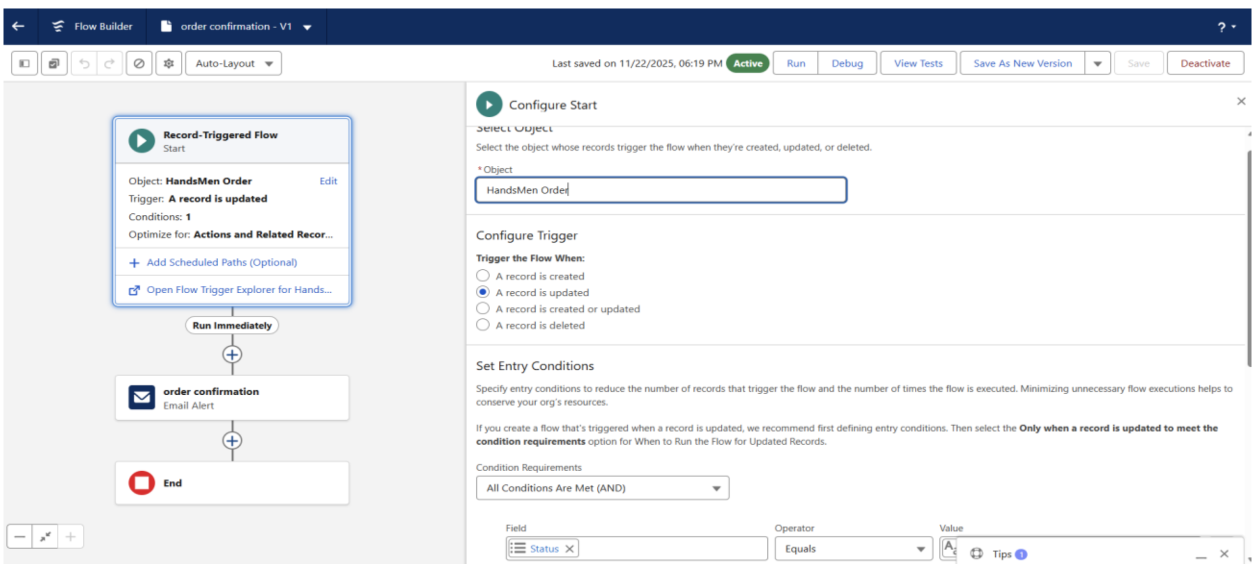
Flows

Salesforce Flows were used to automate critical business processes and minimize manual intervention. By enabling actions to be triggered based on specific conditions, these flows ensure that customers and users receive necessary updates and alerts in a timely manner.

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

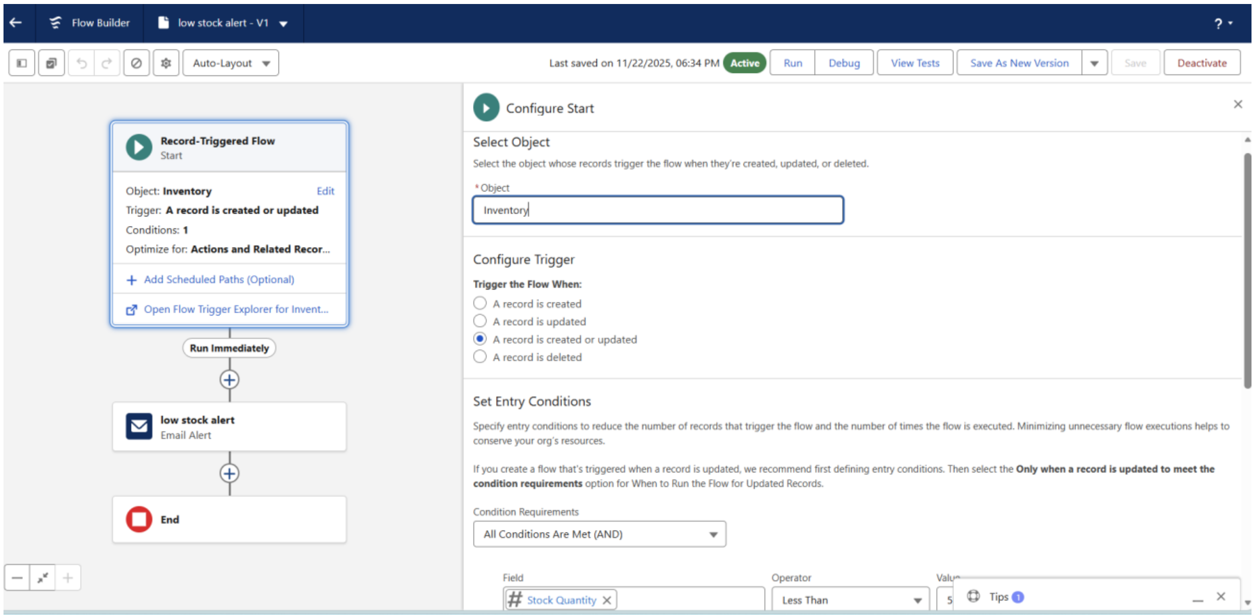
1 . Order Confirmation Flow

- **Type:** Record-Triggered Flow
- **Purpose:** Sends an automated confirmation email when an order is marked as “Confirmed”.
- **Business Impact:** Enhances the customer experience by promptly acknowledging orders and sending them an email confirming the order.



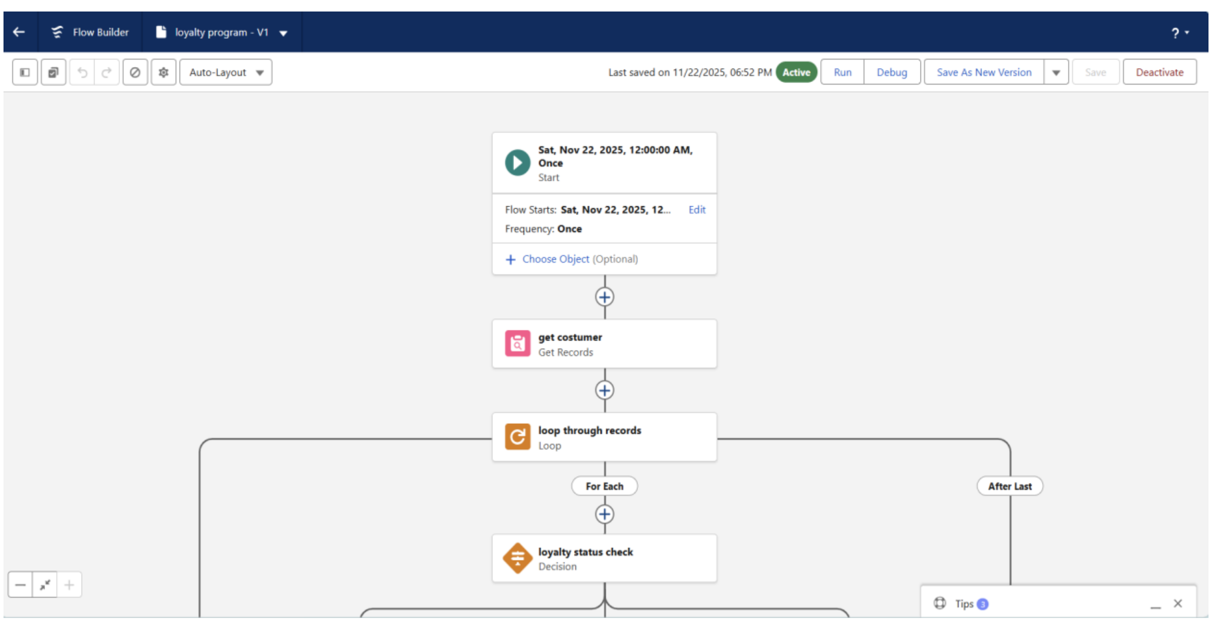
2 . Stock Alert Flow

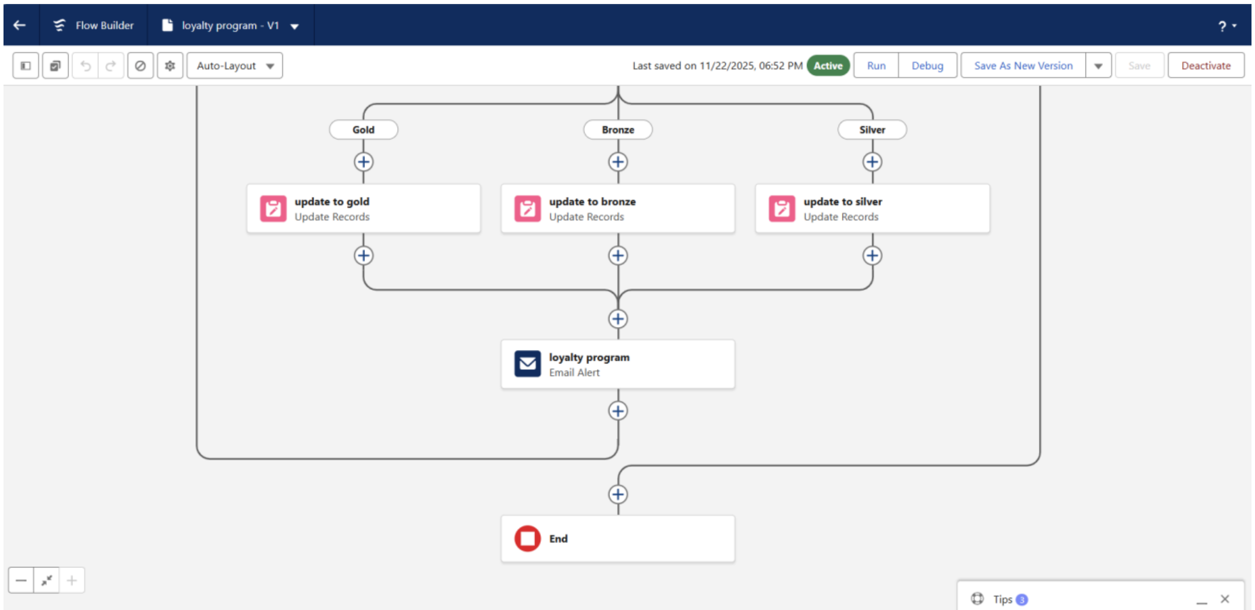
- **Type:** Record-Triggered Flow
- **Purpose:** Triggers a low stock alert when inventory drops below the critical threshold (less than 5 units).
- **Business Impact:** This technology alerts the inventory staff immediately, allowing them to take appropriate replenishment action and avoid stockouts. Furthermore, it immediately sends an email alert to the inventory or company owner, asking them to replenish the supply 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:** This technology keeps client segmentation up to date, allowing for highly focused marketing and personalized communication. It automatically assigns consumers to their appropriate loyalty domains and delivers bespoke congratulations emails informing them of their status.





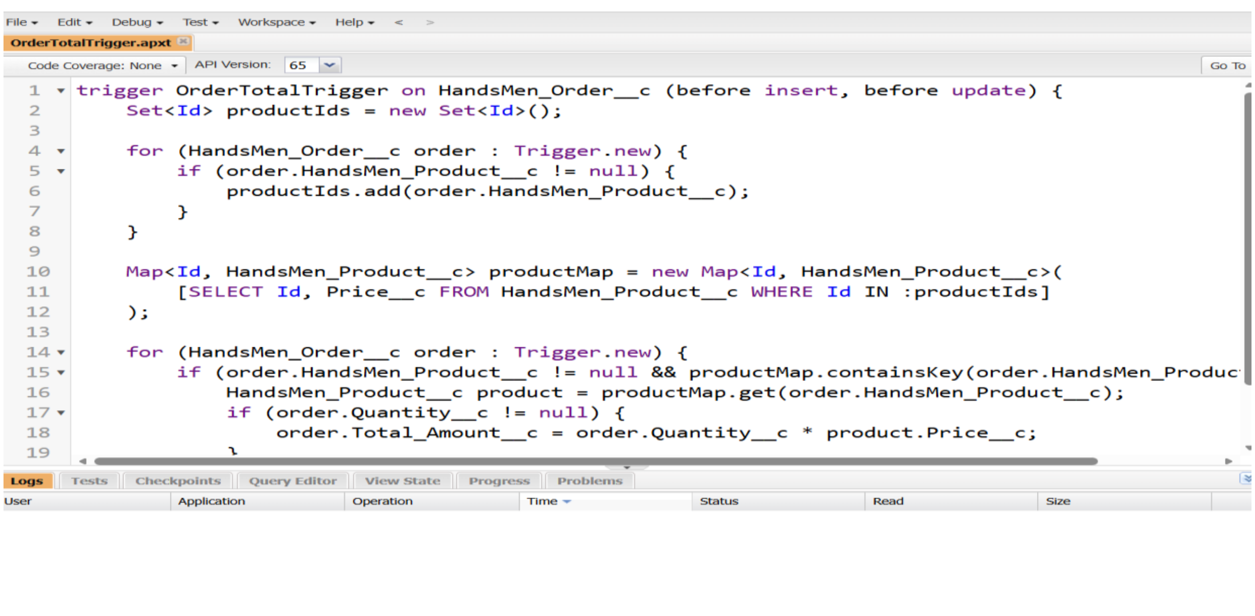
Automation using Apex

To ensure speedy backend processing and data consistency, we used Apex Triggers on the custom objects. These triggers are vital for automating critical business logic at the data layer without requiring manual user intervention.

Two Apex triggers were created for 2 different automations.

1 . Update Order Total Trigger

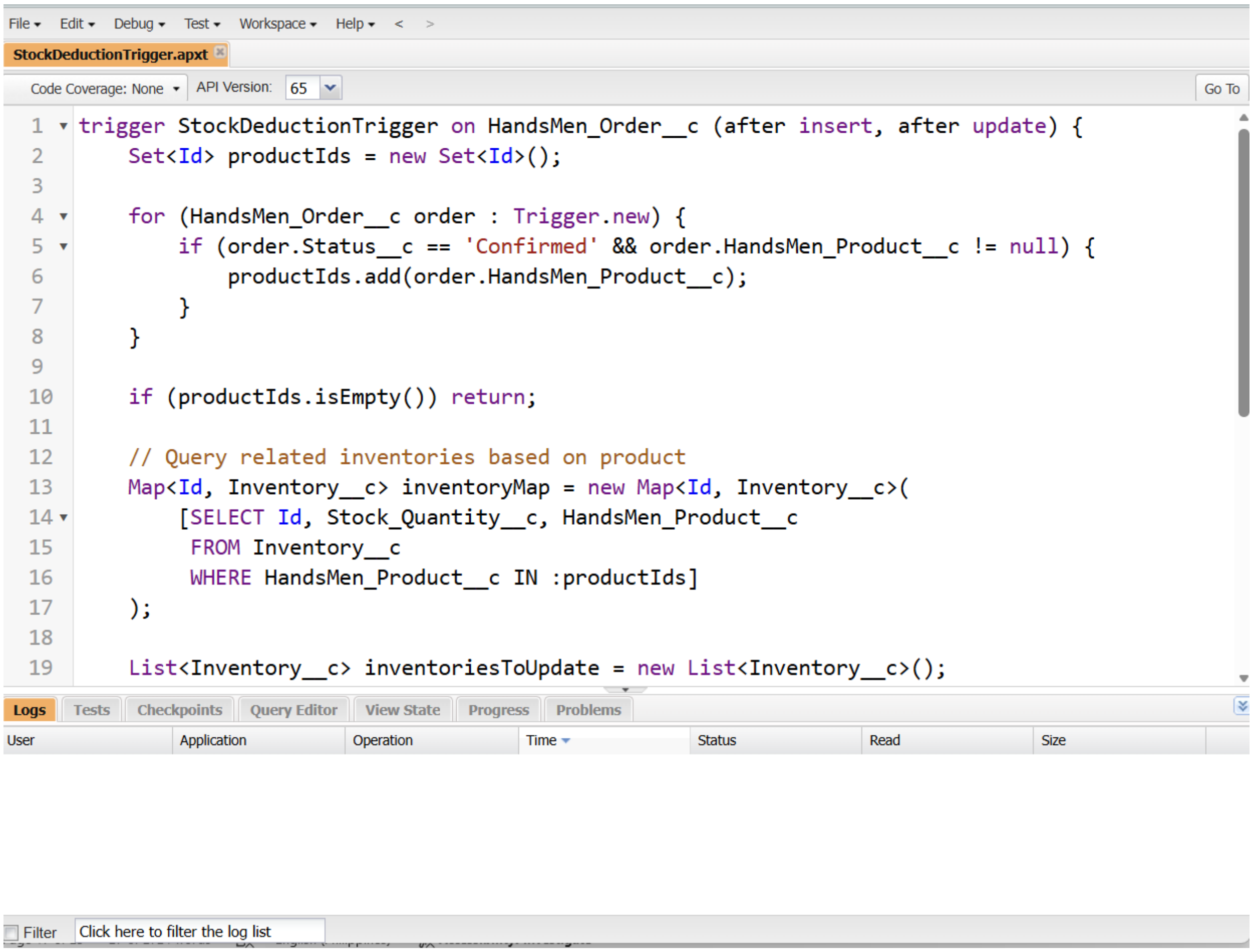
- **Object:** HandsMen_Order__c
- **Purpose:** The Total_Amount__c field is automatically calculated and updated based on the line items or products included in the order.



2 . Stock Deduction Trigger

▯ **Object:** Inventory__c

▯ **Purpose:** Orders are monitored, and the system instantaneously deducts the correct quantity from the relevant inventory record upon order placement.



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

Batch Apex Jobs were introduced to streamline bulk data operations and backend processing. These jobs, which execute asynchronously, are perfect for any time-sensitive or large-scale data handling tasks. Loyalty Point Calculation

- **Purpose:** Loyalty points are automatically updated weekly following an evaluation of each customer's purchase history.
- **Impact:** The system accurately supports the loyalty program by rewarding customers in the Gold, Silver, and Bronze categories.

```
global class InventoryBatchJob implements Database.Batchable<SObject>, Schedulable {

global Database.QueryLocator start(Database.BatchableContext BC) {

return Database.getQueryLocator(

'SELECT Id, Stock_Quantity__c FROM Product__c WHERE Stock_Quantity__c < 10'

);

}

global void execute(Database.BatchableContext BC, List<SObject> records) {

List<HandsMen_Product__c> productsToUpdate = new List<HandsMen_Product__c>();

// Cast SObject list to Product__c list

for (SObject record : records) {

HandsMen_Product__c product = (HandsMen_Product__c) record;

product.Stock_Quantity__c += 50; // Restock logic

productsToUpdate.add(product);

}
```

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

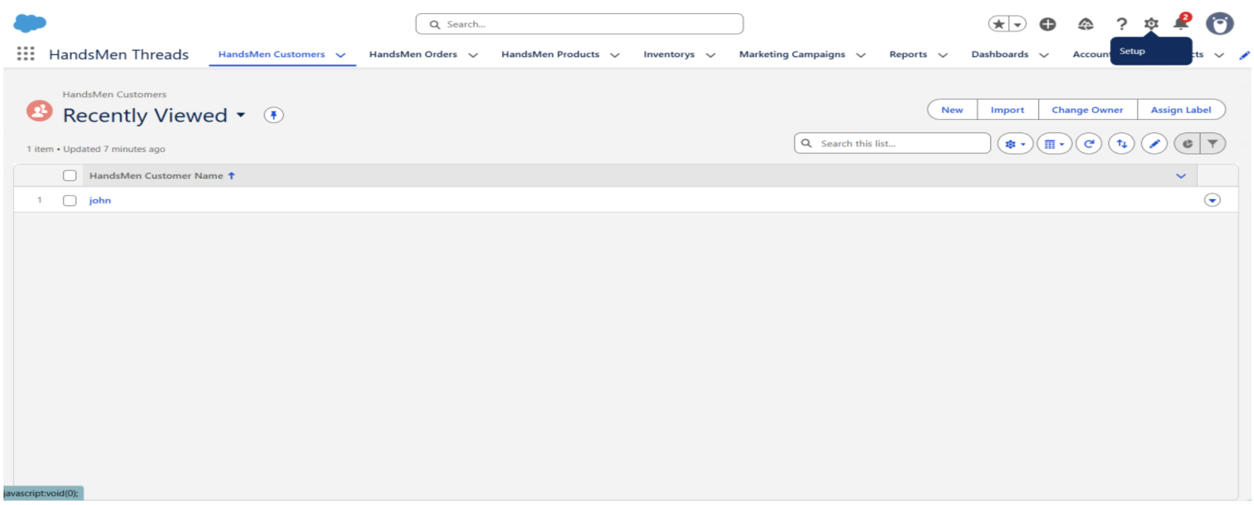


Fig. Custom App for HandsMen Threads

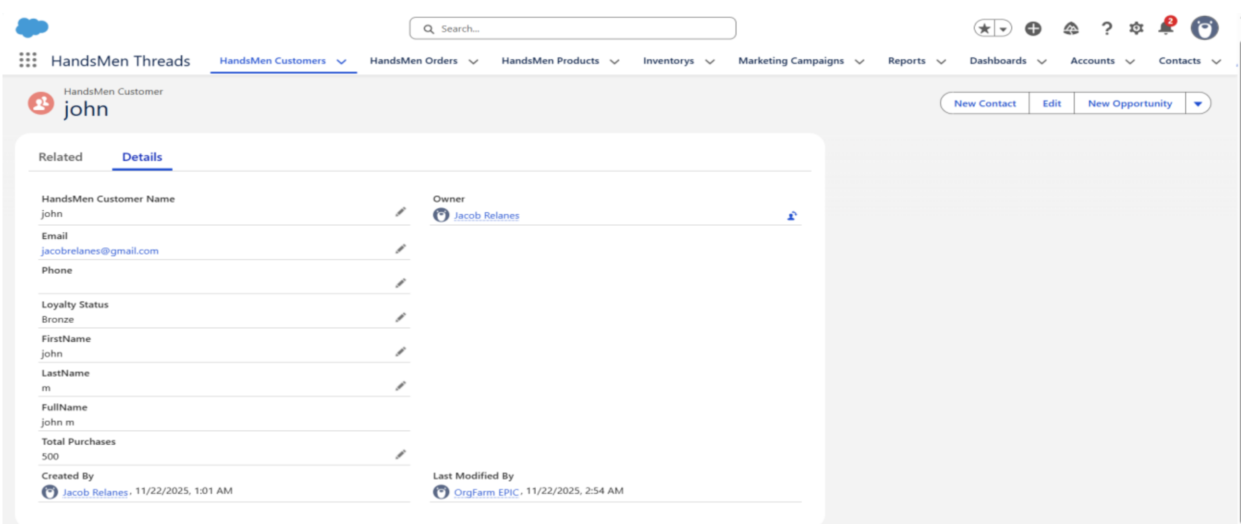


Fig. Customer creation

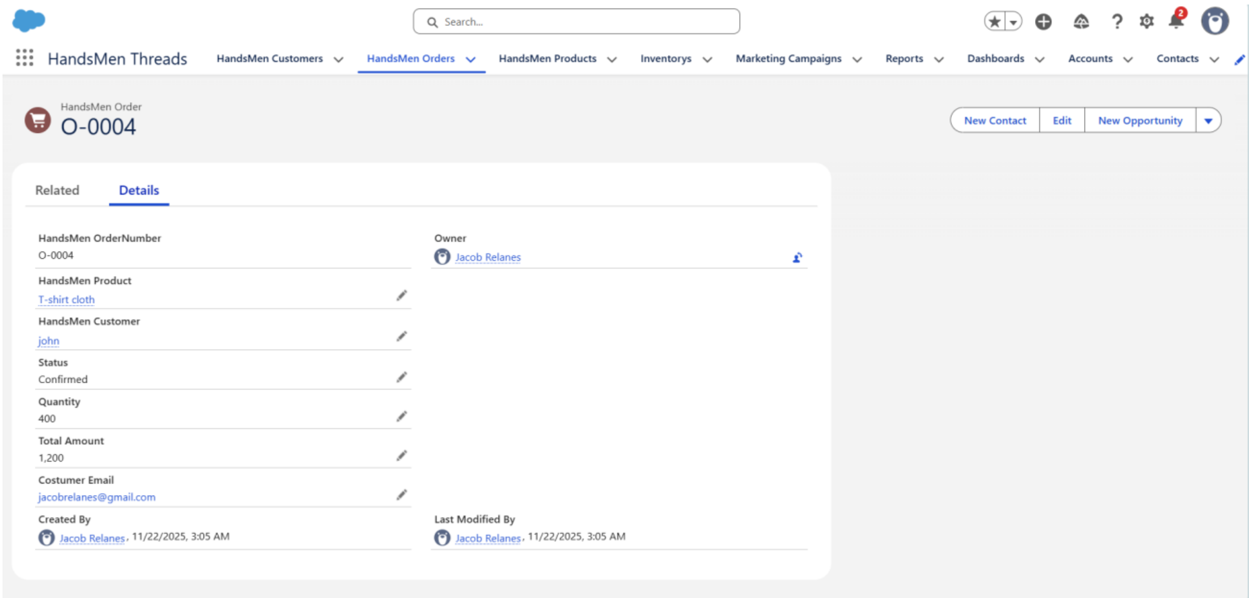


Fig. Order confirmation of the customer

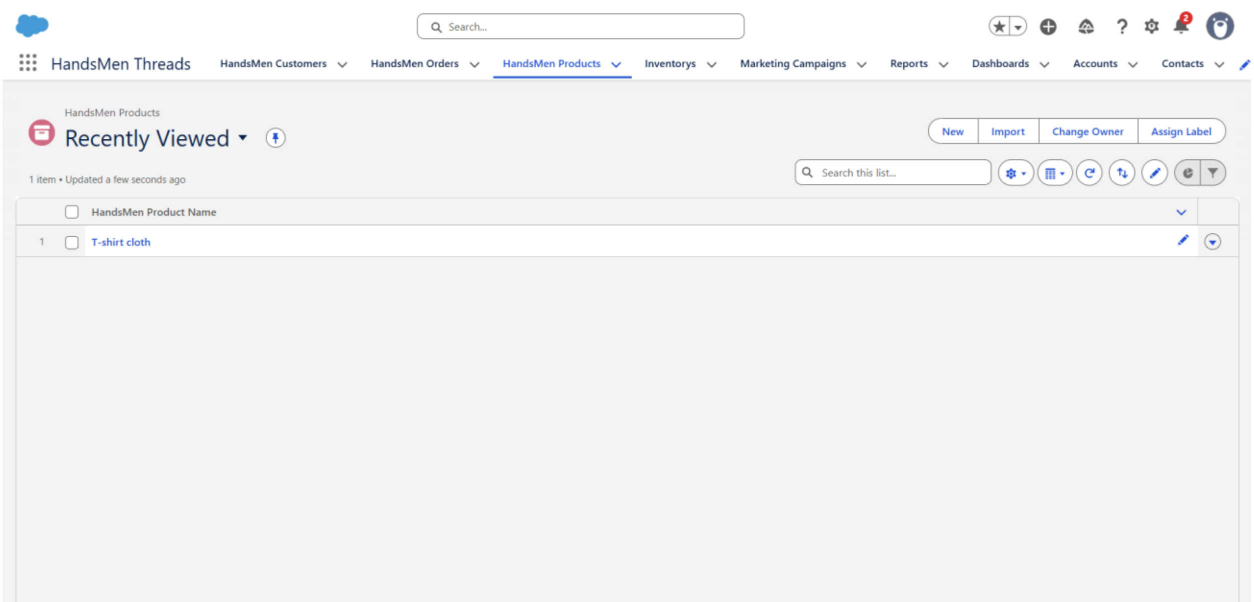


Fig. Collection of available product’s in our store

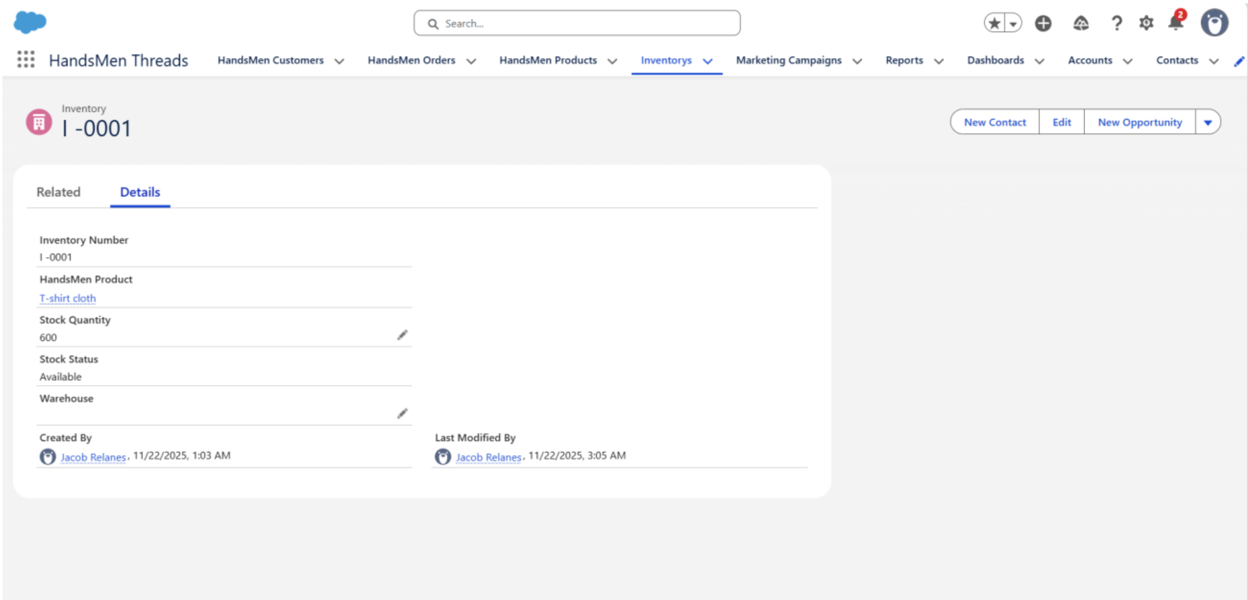


Fig. Inventory of HandsMen Threads

Conclusion

Salesforce CRM for HandsMen Threads is a fully integrated digital system that handles both customer and operational aspects (sales, inventory, marketing, and loyalty). This system has a strong data model, sophisticated automation, secure role-based access, and efficient processes that are ideal for the requirements of a high-speed retail brand.

Future Scope and Enhancements

1. Integration with Payment Gateways

- Payment status updates and refund workflows are automated by the system.

2. Customer Portal

- The system grants customers login access for order tracking, profile management, and viewing their loyalty status.

3. AI-Powered Recommendations

- Einstein AI is used for product suggestions and the analysis of 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