

# **HANDSMEN THREADS: ELEVATING THE ART OF SOPHISTICATION IN MEN'S FASHION**

## **Internship program: Salesforce Virtual Internship**

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### **ABSTRACT:**

This project presents the implementation of a customized Salesforce CRM solution for **HandsMen CRM**, an initiative designed to manage customer interactions and streamline operations in the organic retail sector. The primary objective was to digitize customer records, enhance service tracking, automate routine processes, and maintain secure, consistent data across the platform.

The solution centers around a robust data model featuring a key custom object: **HandsMen\_Customer\_\_c**, which captures essential customer details including contact information, preferences, purchase history, and feedback. Additional functionalities were built using Salesforce automation tools such as **Record-Triggered Flows**, **Validation Rules**, and **Email Alerts** to optimize customer communication, data validation, and service follow-ups.

To ensure secure and scalable usage, the platform includes a **role-based security model** that restricts data visibility according to user roles, thereby protecting sensitive customer information. Scheduled jobs and flows were also configured to manage periodic updates and ensure timely customer outreach.

This end-to-end CRM implementation not only centralizes customer information but also improves staff efficiency and enhances customer satisfaction. It sets the foundation for scalable business growth by leveraging the flexible and powerful Salesforce platform.

### **OBJECTIVE:**

- The primary objective of this project is to design and implement a customized Salesforce CRM solution for **HandsMen CRM** to streamline essential business operations, ensure data integrity, and enhance customer engagement within the organization.
- By creating a centralized system to manage **customer information**, service records, and communication touchpoints, the project aims to:
- **Automate key processes** such as customer onboarding, feedback follow-up, and service reminders using Salesforce automation tools.

- **Ensure accurate and consistent data** entry through the use of validation rules and required fields on forms.
- **Enable real-time visibility** of customer records and service interactions for better tracking and analysis.
- **Improve internal team coordination** by assigning specific access rights and roles to different users through a role-based access control system.
- **Deliver personalized customer experiences** through targeted communication, follow-ups, and service customization, improving satisfaction and retention.

## **TECHNOLOGY DESCRIPTION:**

### **Salesforce**

Salesforce is a cloud-based Customer Relationship Management (CRM) platform that enables businesses to streamline processes, manage customer interactions, and improve overall efficiency. It offers tools for sales, marketing, customer service, and analytics. Developers can use point-and-click tools or programmatic methods (such as Apex and Lightning components) to build and customize business applications.

### **Custom Objects**

Custom Objects in Salesforce function like database tables. They are user-defined objects used to store specific types of data that go beyond standard Salesforce objects.

Examples used in this project:

**Customer\_\_c** – Stores customer information

**Product\_\_c** – Stores product details like name, category, price, and availability

**Order\_\_c** – Records customer orders, including quantity and delivery status

### **Tabs**

Tabs in Salesforce allow users to navigate and manage data associated with objects easily. They provide a UI interface to access the data stored in standard or custom objects.

### **Example:**

A tab for Product\_\_c enables the admin to view, add, or update product details effortlessly.

### **Custom Apps**

Custom Apps in Salesforce are collections of tabs that work together to deliver a complete functionality or business process. In this project, a custom app named HandsMen Threads

was created to manage the flow of customer, product, and order data within a single workspace.

## **Apex**

Apex is a strongly typed, object-oriented programming language used in Salesforce to implement complex business logic. It is used in triggers, controllers, and classes.

### **Usage in this project:**

Writing triggers for automatic updates on order placement

Validations on product availability and pricing

## **Lightning App Builder**

Lightning App Builder is a point-and-click tool in Salesforce used to design custom user interfaces.

### **Used for:**

Creating intuitive dashboards:

Designing user-friendly pages for customers and admin

Validation Rules:

Validation rules ensure data quality by preventing incorrect or incomplete entries.

### **Example:**

Ensuring the price of a product is greater than 0

Mandatory fields for customer contact details

## **DETAIL EXECUTION OF PROJECT PHASES:**

### **1. Developer Org Setup**

To begin the project, a **Salesforce Developer Org** was created using the official Salesforce signup portal:

<https://developer.salesforce.com/signup>

After successful registration:

- The developer account was **verified** via email.
- A **secure password** was set.

- Access to the **Salesforce Setup page** was granted, allowing customization and development of the CRM solution.

This setup provided a full-featured Salesforce environment to build, test, and deploy the required modules for the project.

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## 2. Custom Object Creation

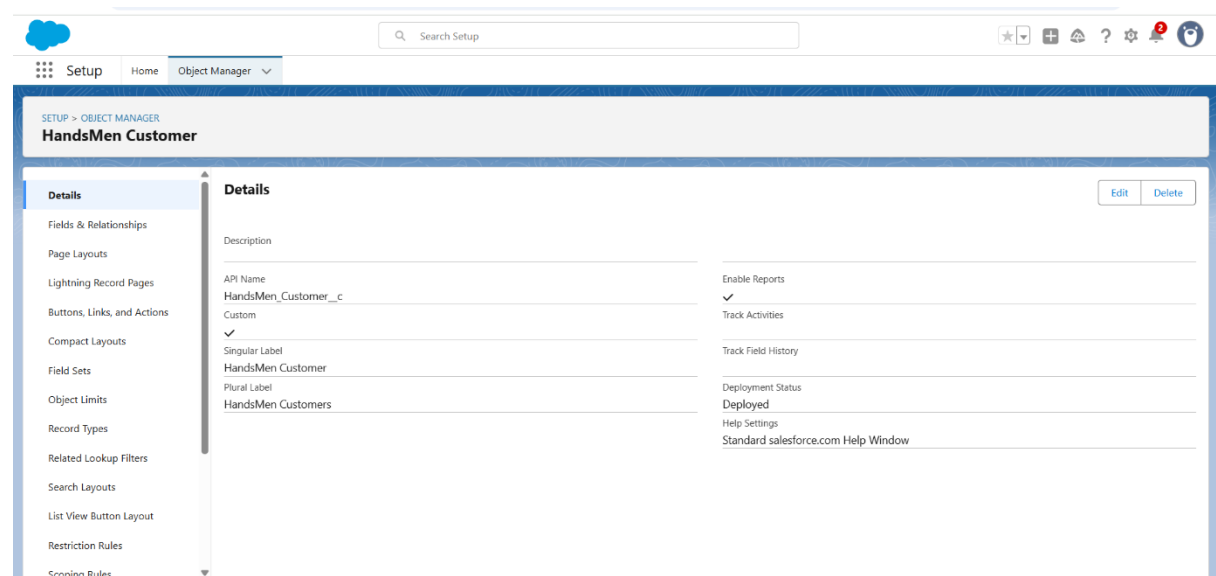
To represent and manage core business data effectively, **five custom objects** were created in Salesforce:

- **HandsMen Customer** – Captures customer details such as name, phone number, email, and loyalty status.
- **HandsMen Product** – Stores product catalog information including SKU, price, and stock levels.
- **HandsMen Order** – Manages customer orders, including product quantities, delivery status, and dates.
- **Inventory** – Tracks warehouse stock availability and product storage information.
- **Marketing Campaign** – Records promotional campaigns, offers, and scheduling details.

### Steps Followed:

1. Navigated to **Setup → Object Manager → Create → Custom Object**
2. Provided object **label, name**, enabled **reporting and search** options

3. **Saved** the configuration and **created Tabs** for each object to allow easy access and UI visibility



### 3. Creating the lighting App

A custom Lightning App named HandsMen Threads was created to provide a unified and user-friendly interface for managing all modules of the CRM.

Key configurations:

- Tabs included: HandsMen Customer, Order, Product, Inventory, Campaign, and Reports
- The app was assigned to the System Administrator profile, ensuring full access to all features during development and testing.

### 4. Validation Rules

To maintain data accuracy and enforce business rules, **validation rules** were implemented on key custom objects:

- **Order Object**
  - Rule: Prevent saving if  $\text{Total\_Amount\_c} \leq 0$
  - Error Message: *"Please Enter Correct Amount"*
- **Customer Object**
  - Rule: Ensure email ends with @gmail.com
  - Error Message: *"Please fill Correct Gmail"*

New HandsMen Customer

\* = Required Information

Information

\* avijari158@agentforce.com Name

Owner Janhavi Jari

Email

Enter a valid email address, such as name@email.com.

Phone

Loyalty Status

FirstName

LastName

Total Purchases

**We hit a snag.**

Review the following fields

- [Email](#)

## 5. User Role and Profile Setup

- Cloned the **Standard User** profile to create a new profile **Platform 1** with access to required custom objects.
- Created roles for departments: **Sales Manager**, **Inventory Manager**, and **Marketing Team** for controlled access and responsibilities.

## 6. User Creation

Users were created in Salesforce and assigned appropriate roles 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.

The screenshot shows the Salesforce Setup interface with the 'Users' section selected in the left sidebar. The main content area displays the 'User Edit' form for 'Niklaus Mikaelson'. The form includes fields for personal information (First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, Division) and system settings (Role, User License, Profile, Active, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Data.com User Type, Data.com Monthly Addition Limit, Accessibility Mode). The 'Role' is set to 'Sales', 'User License' to 'Salesforce', and 'Profile' to 'Platform-1'. The 'Active' checkbox is checked. A 'Required Information' indicator is visible in the top right corner of the form.

## 7. Email Template & Alerts (Short Version)

- Designed 3 email templates:
  - Order Confirmation** (when order is confirmed)
  - Low Stock Alert** (when inventory < 5 units)
  - Loyalty Program Email** (on loyalty status change)
- Linked each email to automated flows for timely alerts.

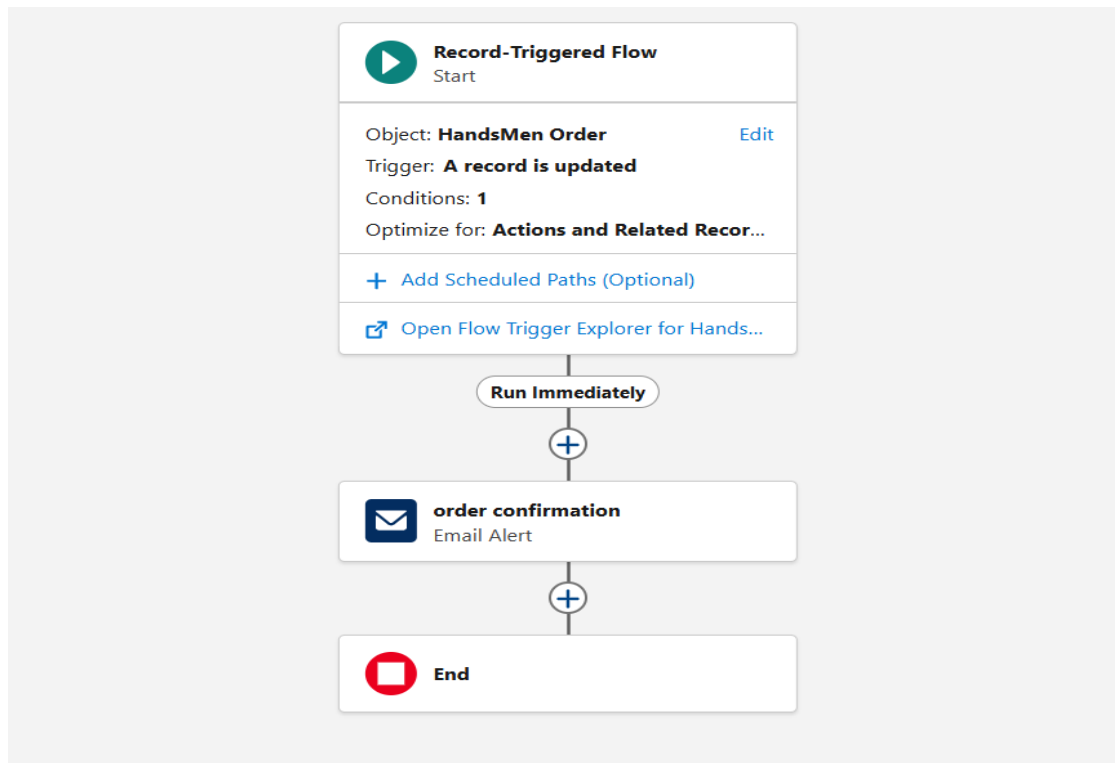
The screenshot shows the Salesforce Setup interface with the 'Classic Email Templates' section selected in the left sidebar. The main content area displays the 'Classic Email Templates' form. The template text is as follows:

```
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
```

## 8.Flow Implementations

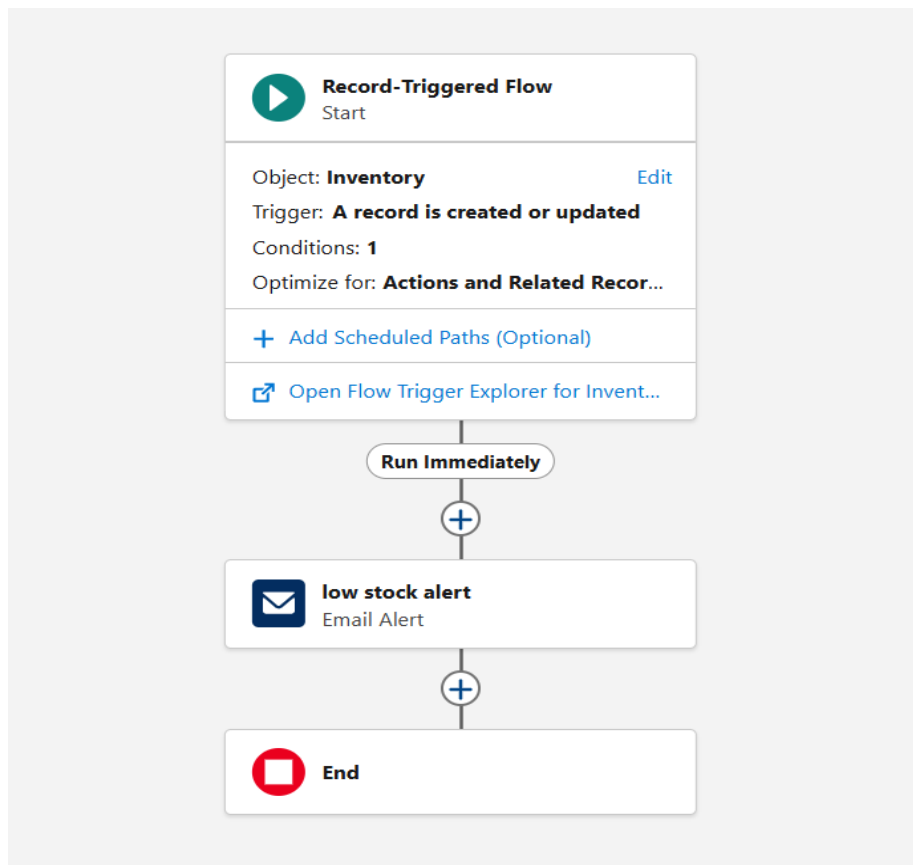
### a. Order Confirmation Flow

- Trigger: When order status is updated to Confirmed. Action: Sends confirmation email to the customer.



## b. Stock Alert Flow

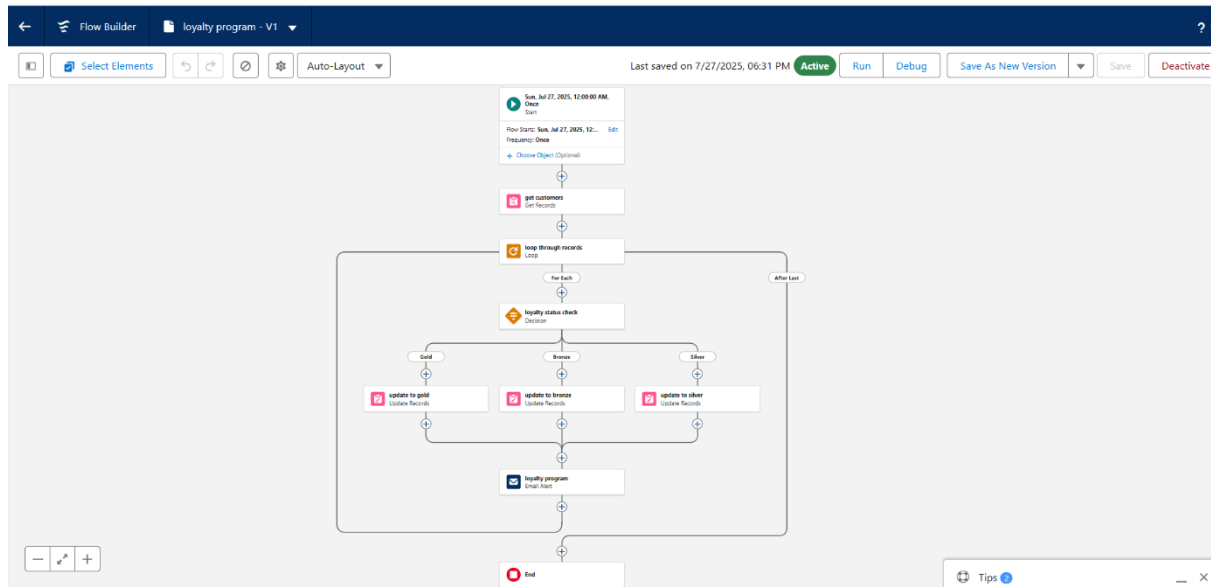
- Trigger: When inventory goes below 5 units.
- Action: Sends a Low Stock Alert to the inventory manager.





### c. Scheduled Flow: Loyalty Update

- Runs daily at midnight.
- Loops through customers and updates their Loyalty Status based on total purchases.



## 7. Apex Triggers

- **Order Total Trigger:** Automatically calculates the total amount using quantity and unit price.
- **Stock Deduction Trigger:** Reduces stock when an order is placed.
- **Loyalty Status Trigger:** Updates the customer's loyalty status based on total purchases.

## PROJECT EXPLANATION WITH REAL-WORLD EXAMPLE

### 1. Customer Registration

- A customer (e.g., Elijah Mikaelson) visits the store or website.
- A record is created in Salesforce with customer details.
- A validation rule checks that the email is in proper format (e.g., contains @gmail.com).

### 2. Product Setup

- Admin adds products (e.g., shirts, jeans) into the Product\_\_c object.
- Each product includes price and other details.

- Inventory is maintained to track available stock.

### 3. Order Placement

- Customer (Elijah) buys 2 shirts (₹500 each), so order = ₹1000.
- A new Order record is created in Salesforce.
- **Apex Trigger:** Calculates total amount automatically:  $2 \times 500 = ₹1000$ .

### 4. Inventory Update

- After order is placed:
  - **Apex Trigger:** Reduces inventory stock by 2.
  - **Validation Rule:** Ensures stock never goes below 0.

### 5. Loyalty Program

- Elijah's total purchase is ₹1000.
- A **trigger** on Customer checks total spending:
  - **< ₹500** → Bronze
  - **₹500–₹1000** → Silver
  - **> ₹1000** → Gold
- Elijah becomes a **Silver member**.

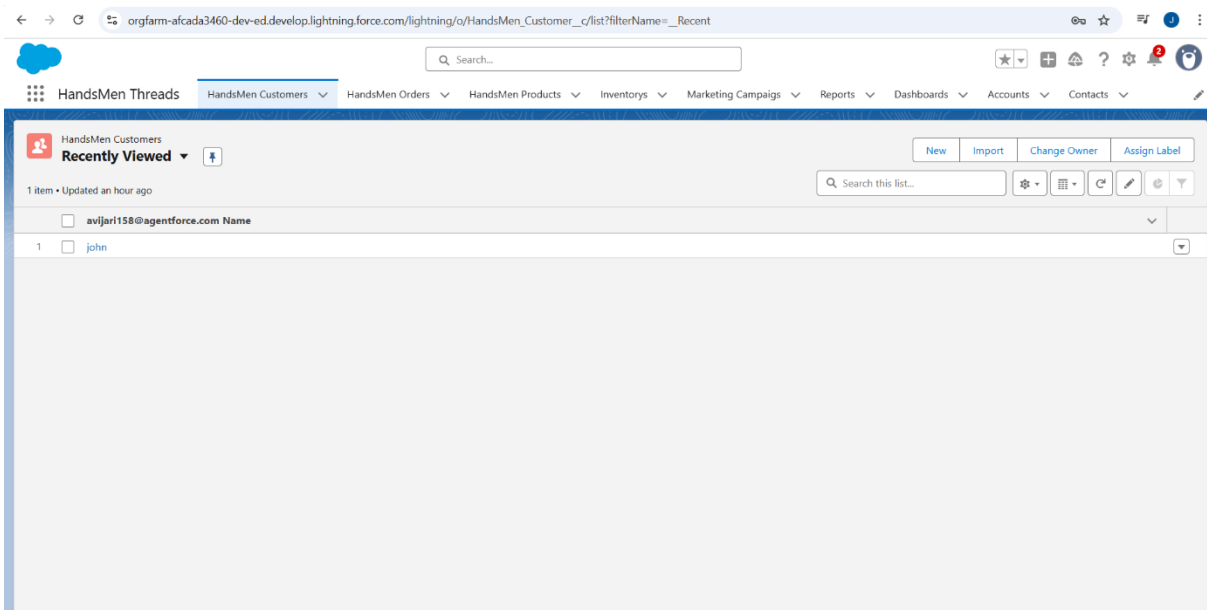
### 6. Email Notifications

- When an order is placed or loyalty level changes:
  - **Flow + Email Alert** is triggered.
  - Elijah receives an email update.

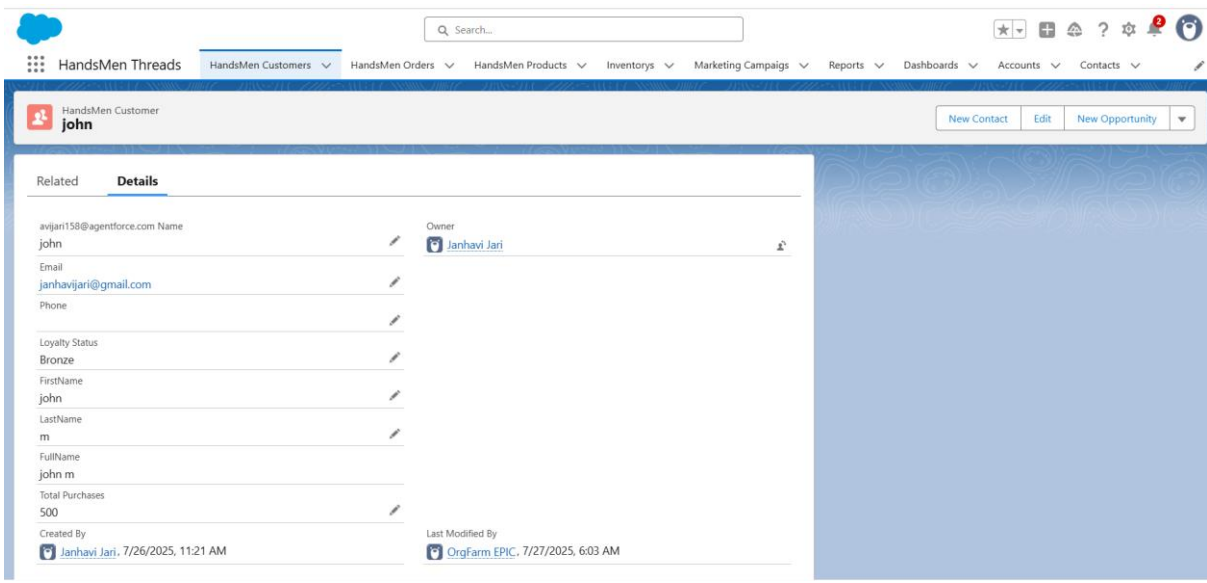
### 7. Users and Roles

- Salesforce users (like store staff) are created:
  - **Niklaus Mikaelson** – *Sales Role* (Platform 1 Profile)
  - **Kol Mikaelson** – *Inventory Role* (Platform 1 Profile)

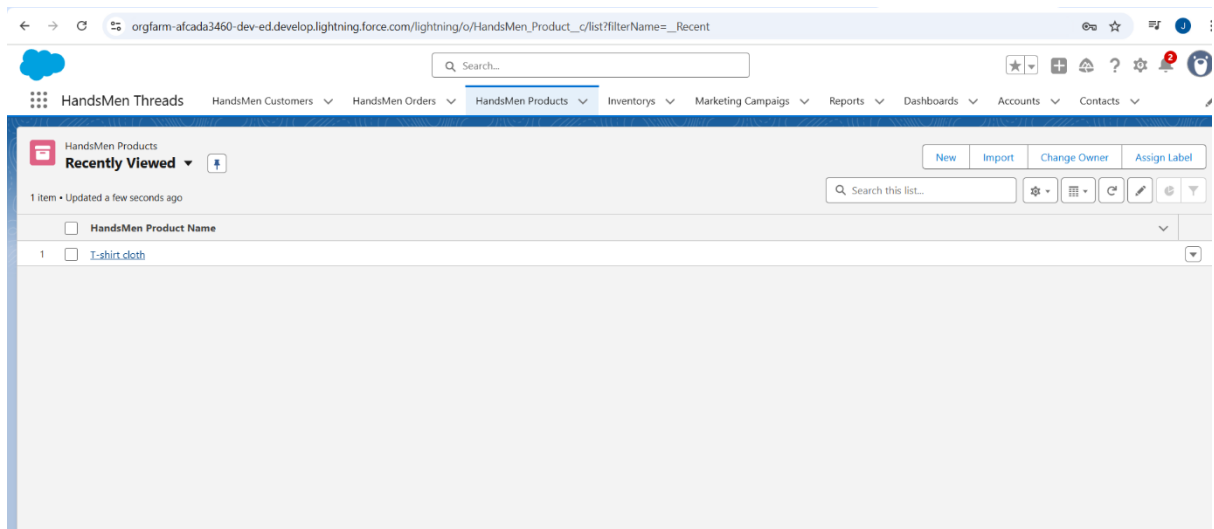
**SCREENSHOTS**



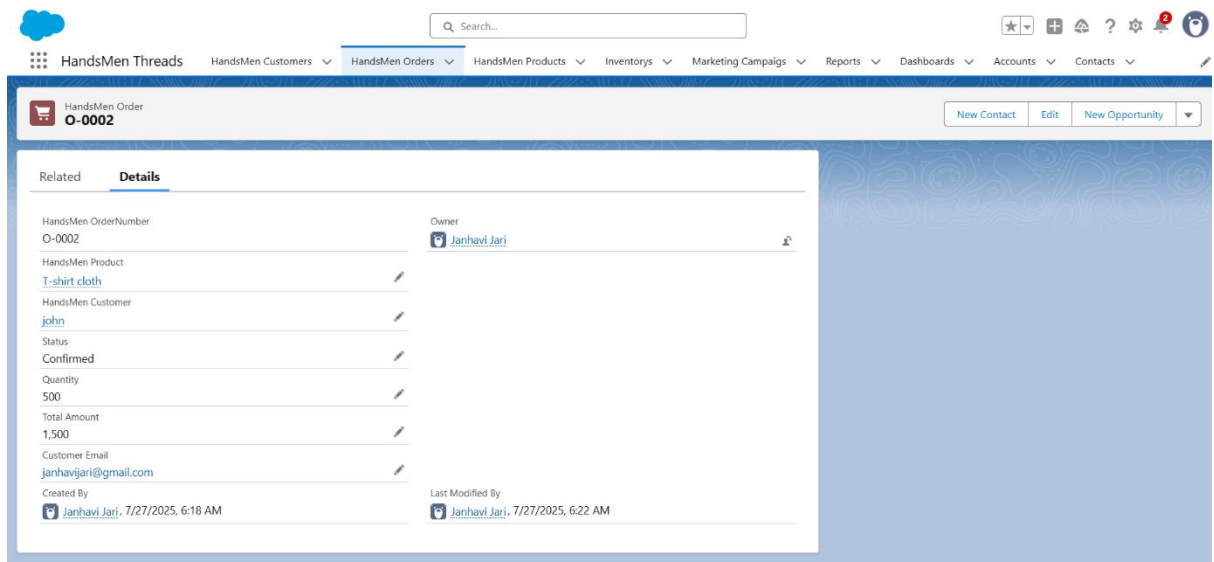
**Fig: Custom App for HandsMen Threads**



**Fig: New Customer Creation**

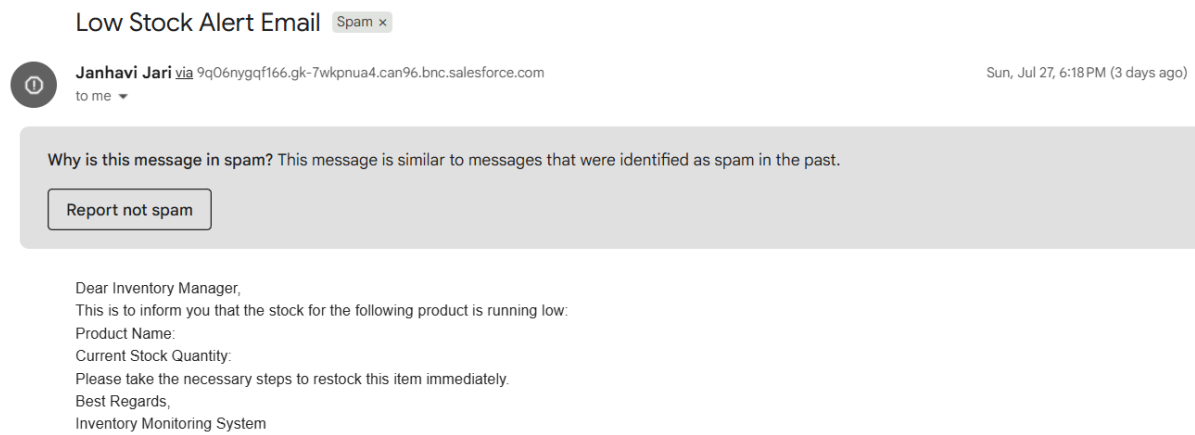


**Fig: Products in HandsMen Customer**

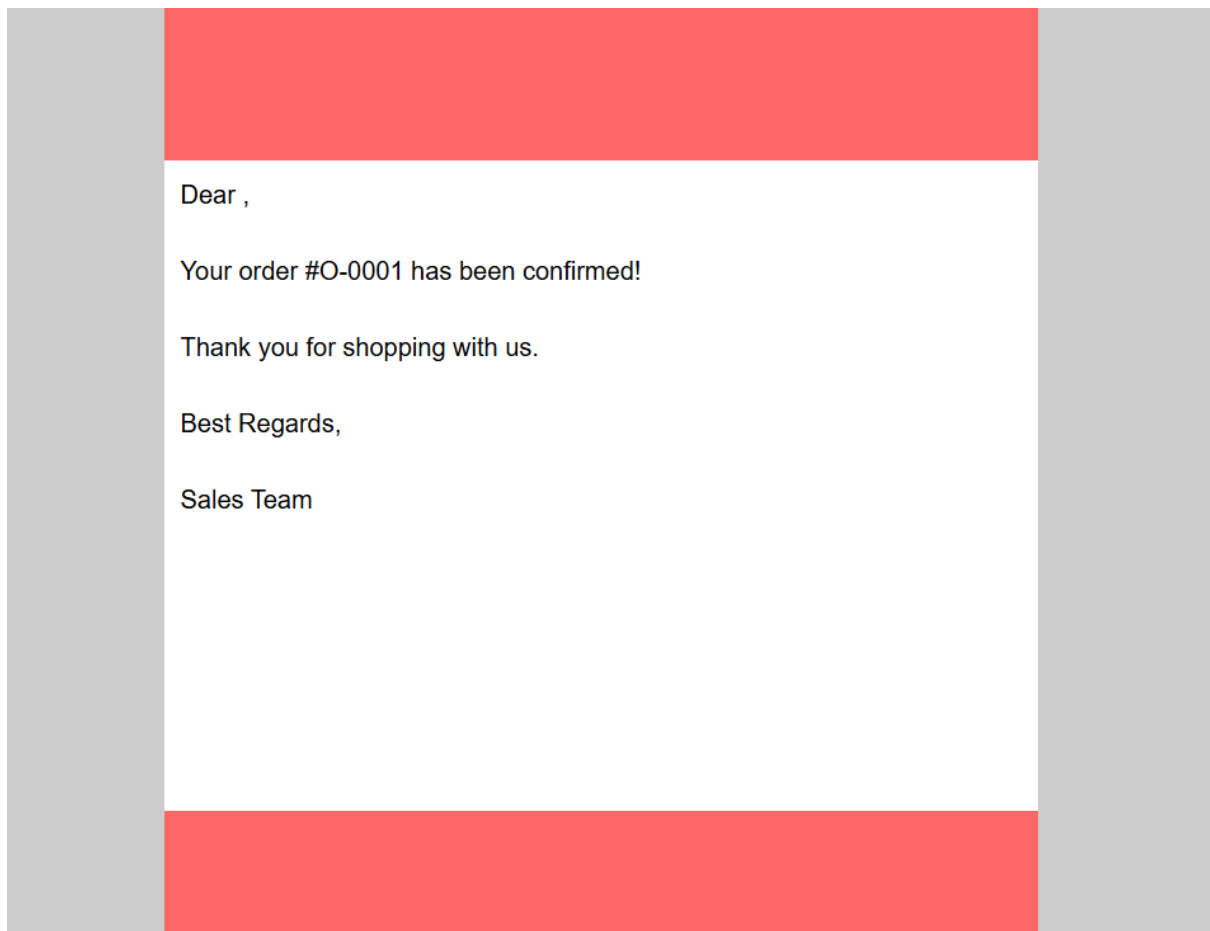


**Fig: Order Confirmation**

Fi



**Fig: Low Stock email**



**Fig: Order Confirmation email**

## **CONCLUSION**

The HandsMen Threads CRM system, built on Salesforce, effectively streamlines essential business operations such as customer management, order processing, product cataloging, inventory tracking, and loyalty program automation. By leveraging powerful Salesforce features like Custom Objects, Flows, Validation Rules, Email Alerts, and Apex, the system ensures accurate data handling, real-time updates, and an enhanced user experience.

This automation minimizes manual errors, accelerates business processes, and improves overall decision-making through insightful analytics and dashboards. The platform's structured user roles further enhance operational efficiency and scalability, making it a robust solution for managing sales and stock operations in real time.

### **Future Scope**

1. **Customer Portal Integration** – Let customers view orders, loyalty status, etc.
2. **Mobile App** – Manage inventory and orders on mobile.
3. **Reports & Dashboards** – For real-time monitoring and analysis.
4. **AI Recommendations** – (Einstein) for smarter decisions.
5. **WhatsApp/SMS Alerts** – Notify customers about orders and loyalty updates.