

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

ABSTRACT

This project created a customized Salesforce CRM system for HandsMen Threads to make business operations easier and improve customer engagement. It uses five custom objects and automation tools like Flows, Email Alerts, and Apex to manage orders, loyalty updates, and inventory.

To keep data accurate and secure, validation rules and role-based access were set for the Sales, Inventory, and Marketing teams. A scheduled Apex batch job also helps track low inventory levels. Overall, this CRM solution improves customer experience, boosts efficiency through automation, and provides a scalable foundation for the company's future growth.

OBJECTIVE

The project aims to create a customized Salesforce CRM for Hands Men Threads to improve business operations, ensure accurate data, and boost customer satisfaction.

Develop a centralized Salesforce CRM integrating customer, order, inventory, and marketing data for HandsMen Threads.

Automate key business processes using Flows, Email Alerts, and Apex to increase efficiency and reduce manual work.

Enhance customer engagement with personalized communication via automated order confirmations, loyalty notifications, and marketing campaigns.

Ensure accurate and reliable data through validation rules, record security, and role-based access for Sales, Inventory, and Marketing teams.

Create a scalable CRM foundation to support future business growth and expansion of operations and customer base.

Improve inventory management with automated low-stock alerts and scheduled batch updates to maintain optimal stock levels.

TECHNOLOGY DESCRIPTION

This project leverages Salesforce, a cloud-based CRM platform, to create a complete business solution for HandsMen Threads. Salesforce lets you make new objects, automate workflows, and store data safely without having to build your own infrastructure. Record-Triggered Flows, Scheduled Flows, Email Alerts, Validation Rules, Reports, Dashboards, and Apex are some of the most important features that are employed. Apex, the programming language used by Salesforce, does things like bulk stock changes and record processing.

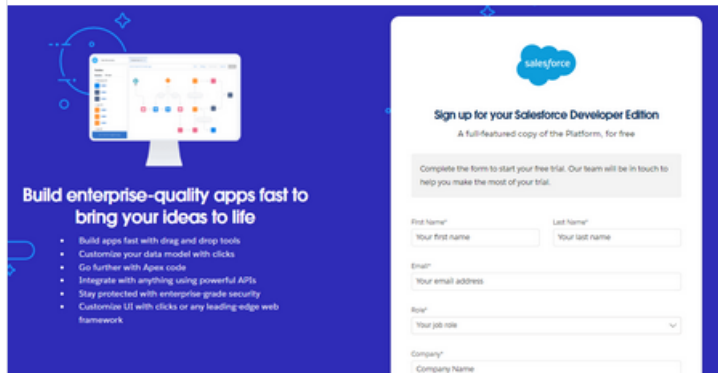
The platform's role-based security makes sure that only certain people can see sensitive data, and its cloud architecture lets authorized users access the system from any device at any time. These technologies make operations run more smoothly, make sure that data is tracked correctly, and give customers a personalized experience.

DETAILED EXECUTION OF THE PROJECT PHASES

1. Developer org setup:

Creating a developer org in salesforce.

1. Go to <https://developer.salesforce.com/signup>
2. On the sign up form, enter the following details :



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- Customize your data model with clicks
- Go further with Apex code
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- Stay protected with enterprise-grade security
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Sign up for your Salesforce Developer Edition
A full-featured copy of the Platform, for free

Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.

First Name*
Your first name

Last Name*
Your last name

Email*
Your email address

Role*
Your job role

Company*
Company Name

1. First name & Last name
2. Email
3. Role : Developer
4. Company : College Name
5. Country : India
6. Postal Code : pin code
7. Username : should be a combination of your name and company

2.Object creation:

Data Management - Objects

Object - HandsMen Customer

Object - HandsMen Product

Object - HandsMen Order

Object - Inventory

Object - Marketing Campaign

3.Data Management and lookup relationship

Data Management - Fields

Field - Email

Field - Phone

Field - Loyalty Status

Create Lookup Relationship

Formula Fields

Create Remaining fields for the objects

4.Creating Validation rules

Data Configuration

Validation Rules

Create Remaining Validation Rules

5.Creating data configuration, Data Security- Profiles, Data Security- Roles, DataSecurity-Users and Data Security- Permission set

Data Configuration

Validation Rules

Create Remaining Validation Rules

Data security - Profiles

Profile - Sales

Data Security - Roles

Role - Sales

Create Roles

Data Security - Users

User - Niklaus

User - Kol

Create Users

Data Security - Permission Set

Permission set - Permission_Platform_1

6.Creating Email Template

Email Template

Create an Order Confirmation Email Template

Create Remaining Email Templates

Create an Email Alert

7.Creating Flows

Flows

Create Order Confirmation Email

Create Stock Alert Email (Record-Triggered)

Create a Scheduled Flow

8.Creating Automation using Apex

Automation using Apex

Create Apex Class

CREATED COMPONENTS

HandsMen Customer

HandsMen Threads

HandsMen Customers

HandsMen Orders

HandsMen Products

Inventories

Marketing Campaigns

Reports

Dashboards

More

HandsMen Customers

Recently Viewed

NewImportChange OwnerAssign Label

2 items • Updated a few seconds ago

Search this list...

HandsMen Customer Name

1

jas

2

john

HandsMen Threads

HandsMen Customers

HandsMen Orders

HandsMen Products

Inventories

Marketing Campaigns

Reports

Dashboards

More

HandsMen Customers

Recently Viewed

NewImportChange OwnerAssign Label

2 items • Updated a few seconds ago

Search this list...

HandsMen Customer Name

1

jas

2

john

New HandsMen Customer

* = Required Information

Information

* HandsMen Customer Name

Owner

Jasmin Latayan

Email

Phone

Loyalty Status

--None--

FirstName

LastName

CancelSave & NewSave

HandsMen Orders

HandsMen Threads

HandsMen Customers

HandsMen Orders

HandsMen Products

Inventories

Marketing Campaigns

Reports

Dashboards

More

HandsMen Orders

Recently Viewed

NewImportChange OwnerAssign Label

5 items • Updated a few seconds ago

Search this list...

HandsMen OrderNumber

1

O-0005

2

O-0004

3

O-0003

4

O-0002

5

O-0001

HandsMen Threads

HandsMen Orders

Recently Viewed

5 items • Updated a few seconds ago

☐

HandsMen OrderNumber

☐

O-0005

☐

O-0004

☐

O-0003

☐

O-0002

☐

O-0001

New HandsMen Order

* = Required Information

Information

HandsMen OrderNumber

Owner

Jasmin Latayan

HandsMen Product

Search HandsMen Products...

HandsMen Customer

Search HandsMen Customers...

Status

--None--

Quantity

Total Amount

Cancel

Save & New

Save

* Customer Email

HandsMen Products

HandsMen Threads

HandsMen Customers

HandsMen Orders

HandsMen Products

Inventories

Marketing Campaigns

Reports

Dashboards

More

HandsMen Products

Recently Viewed

1 item • Updated a few seconds ago

New

Import

Change Owner

Assign Label

Search this list...

☐

HandsMen Product Name

☐

T-shirt cloth

HandsMen Threads

HandsMen Customers

HandsMen Orders

HandsMen Products

Inventories

Marketing Campaigns

Reports

Dashboards

More

New HandsMen Product

* = Required Information

Information

* HandsMen Product Name

Owner

Jasmin Latayan

SKU

Price


Stock Quantity

Cancel

Save & New

Save

Inventory



HandsMen Threads

HandsMen Customers

HandsMen Orders

HandsMen Products

Inventories


Marketing Campaigns


Reports

Dashboards

More

Inventories

 Recently Viewed










New


Import

Assign Label

1 item • Updated a few seconds ago



<input type="checkbox"/>	Inventory Number	
1	<input type="checkbox"/> I-0001	



HandsMen Threads

HandsMen Customers

HandsMen Orders

HandsMen Products

Inventories


Marketing Campaigns


Reports

Dashboards

More

Inventories

 Recently Viewed










New

Import

Assign Label

1 item • Updated a few seconds ago



<input type="checkbox"/>	Inventory Number	
1	<input type="checkbox"/> I-0001	

New Inventory

* = Required Information

Information

Inventory Number

* HandsMen Product

Stock Quantity


Warehouse

Cancel

Save & New

Save

Marketing Campaigns



HandsMen Threads

HandsMen Customers

HandsMen Orders

HandsMen Products

Inventories


Marketing Campaigns


Reports

Dashboards

More

Marketing Campaigns

 Recently Viewed









New


Import

Change Owner

Assign Label

0 items • Updated a few seconds ago





Nothing to see here

There's nothing in your list yet. Try adding a new record.

HandsMen Threads

HandsMen Customers

HandsMen Orders

HandsMen Products

Inventories

Marketing Campaigns

Exports

Dashboards

More

Marketing Campaigns

Recently Viewed

0 items • Updated a few seconds ago

New Marketing Campaign

* = Required Information

Information

Marketing Campaign Number

HandsMen Customer

Start Date

End Date

Owner

Jasmin Latayan

Search HandsMen Customers...

Cancel

Save & New

Save

Order Confirmation

Dear jas,

Your order #O-0004 has been confirmed!

Thank you for shopping with us.

Best Regards,

Sales Team

Stock Alert

Dear Inventory Manager,

This is to inform you that the stock for the following product is running low:

Product Name: T-shirt cloth

Current Stock Quantity: 4

Please take the necessary steps to restock this item immediately.

Best Regards,

Inventory Monitoring System

CONCLUSION

HandsMen Threads' Salesforce CRM solution does a great job of modernizing and streamlining business operations. The system brings together sales, inventory, and marketing into one efficient platform by integrating bespoke objects, automated workflows, and secure data management. It helps the business keep better track of client interactions, orders, inventories, and marketing efforts. Order notifications, low-stock warnings, and scheduled updates are some of the automation features that cut down on human work. This lets the team focus on customer support and growth. Salesforce's ability to grow means that the system can handle future growth while still being safe and reliable. This study shows how CRM technology can help HandsMen Threads do better in business, make customers happier, and be successful in the long run.