

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.

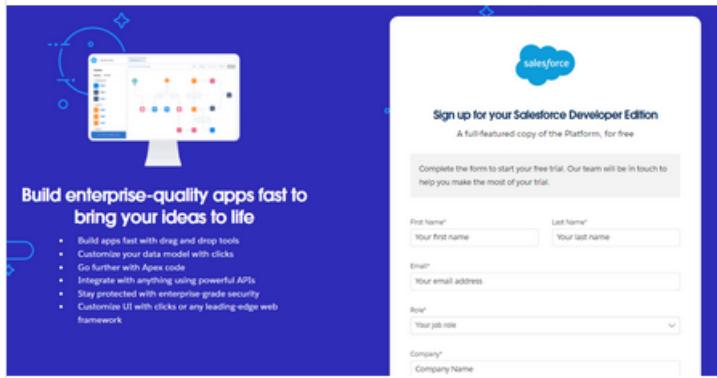
The platform's role-based security makes sure that only certain people can see sensitive data, and its cloud architecture lets authorized users access the system from any device at any time. These technologies make operations run more smoothly, make sure that data is tracked correctly, and give customers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



1. First name & Last name
2. Email
3. Role : Developer
4. Company : College Name
5. County : 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

The screenshot shows two views of the HandsMen Customer component. The top view is a list of recently viewed customers, showing entries for 'jas' and 'john'. The bottom view is a modal for creating a new customer, with fields for Name, Email, Phone, Loyalty Status, FirstName, and LastName. The modal also shows the owner as 'Jasmin Latayan'.

Recently Viewed Customers:

| Index | Customer Name |
|-------|---------------|
| 1 | jas |
| 2 | john |

New HandsMen Customer Form:

| Field | Type | Value |
|----------------|----------|----------|
| Name | Text | [Empty] |
| Email | Text | [Empty] |
| Phone | Text | [Empty] |
| Loyalty Status | Dropdown | --None-- |
| FirstName | Text | [Empty] |
| LastName | Text | [Empty] |

HandsMen Orders

The screenshot shows the HandsMen Orders list view, displaying five recent orders with OrderNumbers O-0005, O-0004, O-0003, O-0002, and O-0001.

Recently Viewed Orders:

| Index | Order Number |
|-------|--------------|
| 1 | O-0005 |
| 2 | O-0004 |
| 3 | O-0003 |
| 4 | O-0002 |
| 5 | O-0001 |

New HandsMen Order

* = Required Information

Information

| | |
|----------------------|---|
| HandsMen OrderNumber | Owner Jasmin Latayan |
| HandsMen Product | <input type="text" value="Search HandsMen Products..."/> |
| HandsMen Customer | <input type="text" value="Search HandsMen Customers..."/> |
| Status | --None-- |
| Quantity | <input type="text"/> |
| Total Amount | <input type="text"/> |

* Customer Email

HandsMen Products

HandsMen Products

Recently Viewed

1 item • Updated a few seconds ago

| |
|--|
| <input type="checkbox"/> HandsMen Product Name |
| 1 <input type="checkbox"/> T-shirt cloth |

New HandsMen Product

* = Required Information

Information

| | |
|-------------------------|-------------------------|
| * HandsMen Product Name | Owner Jasmin Latayan |
| SKU | <input type="text"/> |
| Price | <input type="text"/> |
| Stock Quantity | <input type="text"/> |

Inventory

Screenshot of the Inventory module in HandsMen Threads.

The top navigation bar includes: Cloud icon, Search bar, and various system icons (star, plus, gear, question mark, etc.).

The main menu items are: HandsMen Customers, HandsMen Orders, HandsMen Products, **Inventory**, Marketing Campaigns, Reports, Dashboards, and More.

The current view is under the **Inventory** section, showing the **Recently Viewed** list.

Recent activity: 1 item • Updated a few seconds ago.

Table header: Inventory Number.

Data row: 1 I-0001.

Buttons: New, Import, Assign Label, and a search bar labeled "Search this list..." with filter icons.

A modal window titled "New Inventory" is open, containing the following fields:

- Information** section with a note: * = Required Information.
- Inventory Number**: An input field with placeholder "Search HandsMen Products..." and a magnifying glass icon.
- * HandsMen Product**: A dropdown menu with placeholder "Search HandsMen Products..." and a magnifying glass icon.
- Stock Quantity**: An input field.
- Warehouse**: An input field.

Buttons at the bottom of the modal: Cancel, Save & New, and Save.

Marketing Campaigns

Screenshot of the Marketing Campaigns module in HandsMen Threads.

The top navigation bar includes: Cloud icon, Search bar, and various system icons (star, plus, gear, question mark, etc.).

The main menu items are: HandsMen Customers, HandsMen Orders, HandsMen Products, Inventory, **Marketing Campaigns**, Reports, Dashboards, and More.

The current view is under the **Marketing Campaigns** section, showing the **Recently Viewed** list.

Recent activity: 0 items • Updated a few seconds ago.

A decorative background image of a landscape with clouds and mountains is displayed.

The message "Nothing to see here" is centered, followed by the sub-message: "There's nothing in your list yet. Try adding a new record."

The screenshot shows a software application window titled "HandsMen Threads". At the top, there is a navigation bar with links for "HandsMen Customers", "HandsMen Orders", "HandsMen Products", "Inventory", "Marketing Campaigns", "Reports", "Dashboards", and "More". Below the navigation bar, a sidebar on the left displays "Marketing Campaigns" and "Recently Viewed" sections. The main content area is a modal window titled "New Marketing Campaign". The modal has a header with a close button (X) and a note "* = Required Information". It contains a section titled "Information" with fields for "Marketing Campaign Number" (with an owner link to "Jasmin Latayan"), "HandsMen Customer" (a search bar), "Start Date", and "End Date". At the bottom of the modal are three buttons: "Cancel", "Save & New", and "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.