

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

ABSTRACT

This project shows the development of a customized Salesforce CRM system for HandsMen Threads, a premium men's fashion and tailoring brand. The system helps improve important business tasks such as sales, inventory tracking, and marketing. It includes five custom objects and uses automation tools like Record-Triggered Flows, Scheduled Flows, Email Alerts, and Apex to make work faster and easier.

To keep information accurate and secure, validation rules and role-based security were added. By bringing all these features together in one platform, the system helps HandsMen Threads better connect with customers, reduce manual work, and manage inventory more efficiently. Overall, the CRM provides a strong and scalable foundation for future growth while giving customers a smoother and more personalized experience.

OBJECTIVES:

- Build a centralized Salesforce CRM that organizes all customer, order, inventory, and marketing data in one platform for HandsMen Threads.
- Automate key business processes using Flows, Email Alerts, and Apex to reduce manual work and increase efficiency.
- Improve customer engagement through automated and personalized messages like order updates, loyalty reminders, and targeted marketing campaigns.
- Ensure accurate and secure data by applying validation rules, record-level security, and role-based access for all teams.
- Create a scalable CRM setup that supports future business growth and helps HandsMen Threads reach more customers.
- Strengthen inventory management with low-stock alerts and scheduled updates to maintain proper stock levels.
- Provide better visibility of business performance through organized data, dashboards, and reports that help the team make informed decisions.

TECHNOLOGY DESCRIPTION

This project uses Salesforce, a cloud-based CRM platform, to create an integrated business system for HandsMen Threads. Salesforce offers a flexible and scalable environment where custom objects, automated workflows, and secure data structures can be built without needing physical servers. The system uses key Salesforce features such as Record-Triggered Flows, Scheduled Flows, Email Alerts, Validation Rules, Reports, Dashboards, and Apex to automate tasks, send real-time updates, and customize processes based on the brand's needs.

Apex, Salesforce's programming language, is used for special functions like batch stock updates and automated record processing. Role-based security in Salesforce helps protect sensitive data by controlling who can access certain information. Because Salesforce is cloud-based, authorized users can use the system anytime and from any device. Together, these tools improve efficiency, keep data accurate, and provide a smoother and more personalized experience for the customers of HandsMen Threads.

DETAILED EXECUTION OF THE PROJECT PHASES

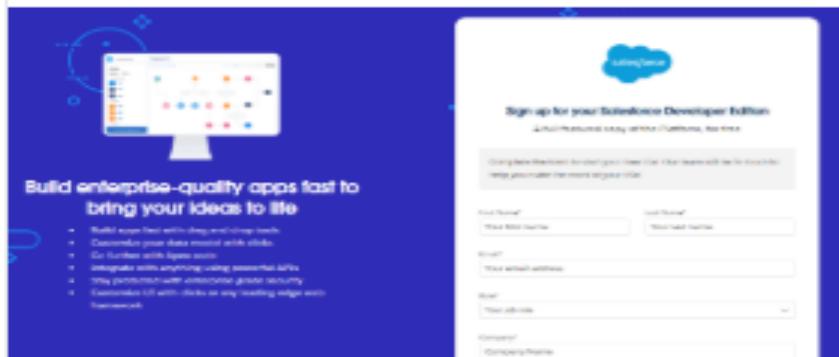
1. Developer org setup:

Creating a developer org in salesforce - <https://developer.salesforce.com/signup>

Creating Developer Account

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

This need not be an actual email id, you can give anything in the format : username@organization.com

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

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 a list view for 'HandsMen Customer'. At the top, there's a navigation bar with links for 'HandsMen Threads', 'HandsMen Customer' (which is active and highlighted in blue), 'HandsMen Orders', 'HandsMen Products', 'Inventory', 'Marketing Campaigns', 'Reports', and 'Dashboards'. Below the navigation is a search bar labeled 'Search...'. On the right side of the header are various icons for filtering, sorting, and actions. The main area displays a table with two rows. The first row has a checkbox next to 'HandsMen Customer Name' and the value '1 kise'. The second row has a checkbox next to 'HandsMen Customer Name' and the value '2 john'. There are dropdown arrows on the right of each row. A message at the top says 'Recently Viewed' with a dropdown arrow and a refresh icon. Below the table is another search bar labeled 'Search this list...' and a set of icons for filtering, sorting, and other actions.

The screenshot shows a form titled 'New HandsMen Customer'. At the top right, there's a note: '* = Required Information'. The form has a tabbed interface with the 'Information' tab selected. It contains the following fields:

- * HandsMen Customer Name: An input field with a placeholder 'Name' and a blue border.
- Owner: A small profile picture of a person named 'glendo camarines'.
- Email: An input field for entering an email address.
- Phone: An input field for entering a phone number.
- Loyalty Status: A dropdown menu with options, currently showing '--None--'.
- FirstName: An input field for the first name.
- LastName: An input field for the last name.

At the bottom right of the form are three buttons: 'Cancel', 'Save & New', and a larger blue 'Save' button.

HandsMen Orders

HandsMen Threads HandsMen Customer **HandsMen Orders** HandsMen Products Inventories Marketing Campaigns Reports Dashboards

HandsMen Orders

Recently Viewed

4 items • Updated a few seconds ago

	HandsMen Order Number	
1	O-0004	▼
2	O-0003	▼
3	O-0002	▼
4	O-0001	▼

New

Import

Change Owner

Assign Label

Search this list...

Filter icons: Search, Sort, Filter, Copy, Paste, Undo, Redo, Print, Refresh

New HandsMen Order

* = Required Information

Information

HandsMen Order Number

Owner
glendo camarines

HandsMen Customer

Search HandsMen Customer... 

Status
--None--

Quantity

Total Amount

Customer Email

Cancel **Save & New** **Save**

HandsMen Products

HandsMen Products

Recently Viewed ▾ 

2 items • Updated a few seconds ago

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

New  Search this list...      

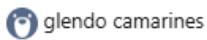
New HandsMen Product

* = Required Information

Information

* HandsMen Product Name

Owner



Order

SKU

Price

Stock Quantity

[Cancel](#)

[Save & New](#)

[Save](#)

Inventoryst

The screenshot shows the HandsMen Inventory module. At the top, there is a navigation bar with links: HandsMen Threads, HandsMen Customer, HandsMen Orders, HandsMen Products, Inventory (selected), Marketing Campaigns, Reports, and Dashboards. Below the navigation bar is a header titled "Inventory" with a "Recently Viewed" dropdown and a refresh button. A search bar says "Search this list..." and a set of icons for filtering, sorting, and other actions. The main area displays a table with two items:

	Inventory Number	
1	I-0001	(dropdown)
2	I-0002	(dropdown)

Below the table, it says "2 items • Updated a few seconds ago".

New Inventory

* = Required Information

Information

Inventory Number

* HandsMen Product

Stock Quantity

Warehouse

[Cancel](#)

[Save & New](#)

[Save](#)

Order Confirmation

The screenshot shows a Gmail inbox with a search bar at the top containing "in:spam". The left sidebar includes options like "Compose", "Inbox" (616), "Starred", "Snoozed", "Sent", "Drafts", "Purchases" (290), "Less", "Important", "Scheduled", "All Mail", "Spam" (18), "Trash", "Manage subscriptions", "Manage labels", and "Create new label". The main area displays an email message with a redacted body. The visible text is:

Dear john,
Your order #O -0004 has been confirmed!
Thank you for shopping with us.
Best Regards,
Sales Team

*Check your spam folder in your email because it always goes there before reaching your inbox.

Stock Alert

The screenshot shows an email from "glendo camarines via 2wkz97dkcejb8.gk-fschpual.can96.bnc.salesforce.com" with the subject "Low Stock Alert Email". A "Spam" button is visible. A message box contains the text: "Why is this message in spam? This message is similar to messages that were identified as spam in the past." Below it is a "Report not spam" button.

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

*Check your spam folder in your email because it always goes there before reaching your inbox.

CONCLUSION

The creation of the Salesforce CRM system for HandsMen Threads highlights how cloud-based solutions can transform and simplify daily business operations in the men's fashion sector. By building custom objects, setting up automated processes, and applying strong data-management controls, the project successfully connected the company's sales, inventory, and marketing activities into one streamlined system. This allows the business to monitor customer interactions, oversee orders, manage stock levels, and run marketing efforts with improved accuracy and efficiency.

Features such as automated order updates, inventory alerts, and scheduled record processing help reduce repetitive manual work, giving the team more time to focus on customer satisfaction and strategic growth. Because Salesforce is highly scalable, the system can continue to evolve and support future expansion while maintaining strong security and dependable performance. Overall, this project demonstrates that using CRM technology effectively can boost business productivity, enhance customer experience, and strengthen the long-term success of a modern fashion brand like HandsMen Threads.