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

ABSTRACT

HandsMen Threads is a growing brand in the men's fashion industry, dedicated to delivering modern sophistication through high-quality apparel. To support its business expansion and strengthen customer relationship management, this project implements a **Salesforce CRM solution** tailored to the company's operational needs.

This system introduces a well-structured data model that centralizes key business information such as customer profiles, product catalog details, order records, and loyalty status. With Salesforce automation tools like Flows and Validation Rules, the platform enhances data accuracy, streamlines business processes, and enables more personalized customer engagement.

By leveraging Salesforce's cloud capabilities, this project empowers HandsMen Threads to improve decision-making, boost team productivity, and build long-term customer loyalty and ultimately elevating the brand's overall business performance in the competitive fashion market.

OBJECTIVE

To develop a Salesforce-based Customer Relationship Management (CRM) system for HandsMen Threads that centralizes business data, streamlines operational processes, and enhances customer engagement and loyalty.To design and implement a secure and scalable data model in Salesforce that will store essential business information such as customer profiles, product details, and sales records.

1. To **automate business workflows** using Salesforce Flows in order to reduce manual processes and improve operational efficiency.

2. To ensure **accurate and consistent data entry** through the use of validation rules and standardized field configurations.

3. To provide **real-time visibility and tracking** of customer interactions, enabling the business to make informed and data-driven decisions.

4. To improve the overall **customer experience** by supporting personalized engagement and loyalty management.

5. To generate **analytical reports and dashboards** that will assist management in monitoring business performance and identifying growth opportunities.

TECHNOLOGY DESCRIPTION

This project utilizes Salesforce CRM as the primary cloud platform for managing business data and customer interactions. Salesforce Flow is used to automate business processes and improve operational efficiency without the need for coding. Object Manager enables the creation and configuration of custom objects, fields, and relationships that support the proper structuring of business information. Validation Rules are implemented to ensure accuracy, completeness, and consistency of all captured data. Reports and Dashboards provide real-time insights into customer behavior, sales performance, and overall business operations.

Security and access control are maintained through Profiles and Permission Sets, allowing only authorized users to view or modify sensitive data. Data Import tools, such as Data Import Wizard or Data Loader, are used for transferring and updating records necessary for system setup and maintenance. GitHub is utilized to store project documentation and track changes for version control. Visual Studio Code may also be incorporated for extended configuration or development tasks when needed by the project.

DETAILED EXECUTION OF PROJECT PHASES

1. **Developer Org Setup**

   The initial Salesforce Developer Org was created and configured to serve as the environment for building, testing, and deploying all system components for HandsMen Threads.

2. Custom Object Creation

Custom objects such as Customers, Products, Orders, and Loyalty Status were created to represent business-specific data structures aligned with organizational requirements.


3. Creating the Lighting App

A custom Lightning App was developed to group related objects, tabs, and navigation items, allowing users to access CRM functionalities in a structured and user-friendly interface.
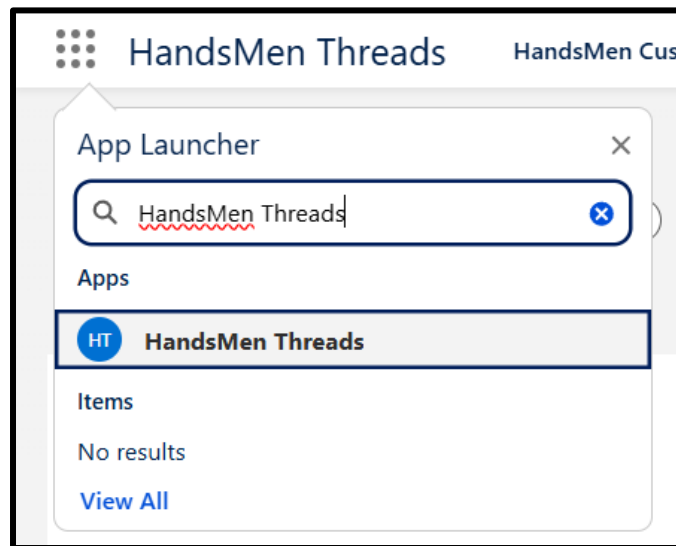
4. Validation Rules

Validation rules were implemented to maintain data accuracy and prevent users from entering incomplete or incorrect information in key fields.
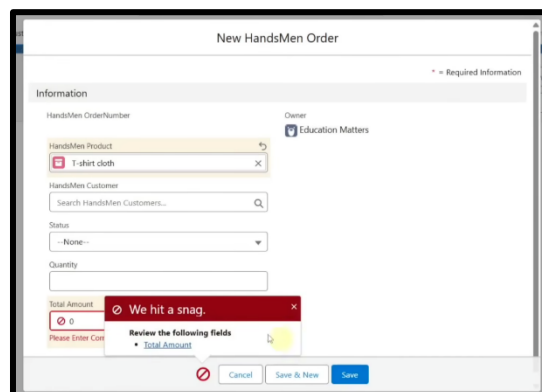
5. User Role & Setup

Roles were established to reflect the company hierarchy and ensure proper data visibility across different user levels within the organization.


6. User Creation

Individual user accounts were created and assigned appropriate profiles and permission sets to control access and ensure secure operations.

7. Email and Template & Alerts

Automated email templates and alerts were set up to notify customers and internal users regarding important transactions such as order confirmations and stock replenishments.
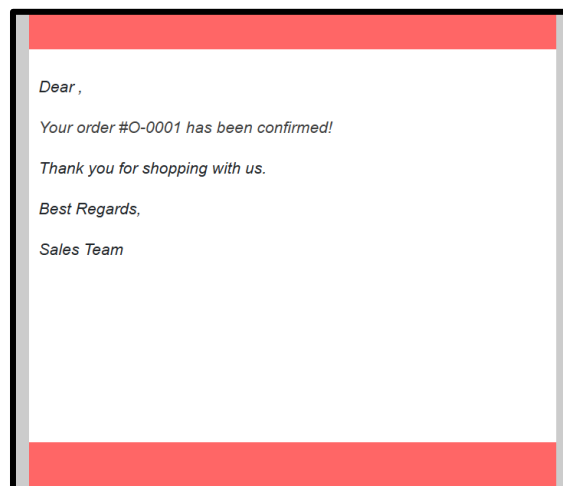
8. Flow Implementations

a. Order Confirmation Flow

Automatically sends confirmation notifications when an order is successfully submitted and stored in the system.

b. **Stock Alert Flow**
   Sends internal alerts to inventory managers when product stock levels fall below a defined threshold.

c. **Scheduled Flow: Loyalty Update**
   Periodically evaluates customer purchase activity and updates their loyalty status based on set conditions and point thresholds.
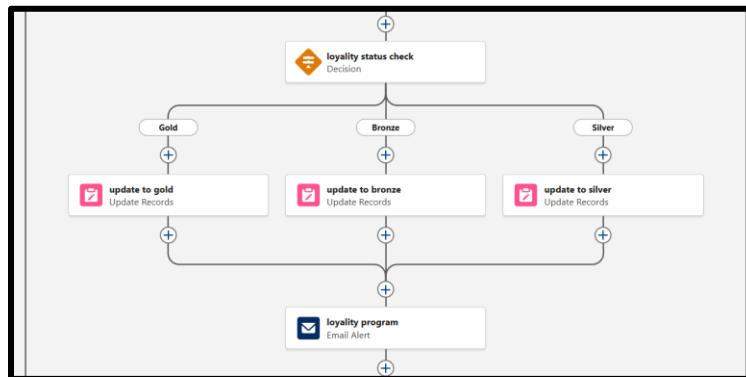
9. **Apex Triggers**

   - **Order Total Trigger**
     Automates the calculation of the total amount for every order based on purchased products and their assigned prices.

   - **Stock Deduction Trigger**
     Automatically deducts stock levels when an order is placed and ensures accurate inventory tracking.

   - **Loyalty Status Trigger**
     Updates the loyalty status of customers based on accumulated points and order history, enhancing customer reward management.

PROJECT USAGE IN REAL-WORLD

This Salesforce CRM project for HandsMen Threads provides practical value by improving how the business operates and engages with its customers. By consolidating customer information, sales transactions, and product inventory into a single platform, employees can access accurate and updated data whenever needed. Automated processes such as order confirmations, stock monitoring, and customer loyalty updates eliminate repetitive manual tasks, allowing the team to focus more on customer service and business growth. Here are some examples:

1. **Personalized Customer Engagement**
   Sales teams can instantly view customer preferences and purchase history, enabling tailored outfit recommendations and improved customer loyalty.

2. **Checking Product Availability**
   Employees view real-time inventory levels to confirm if a size or item is still in stock before processing a customer request.

3. **Accessing Customer Details During Sales**
   The sales team checks a customer's saved information like preferred sizes, past orders, and membership level to assist them quickly.

4. **Triggering Stock Replenishment Actions**
   When a product falls below the threshold, the system alerts inventory personnel so they can restock immediately and avoid product shortages.

SCREENSHOTS
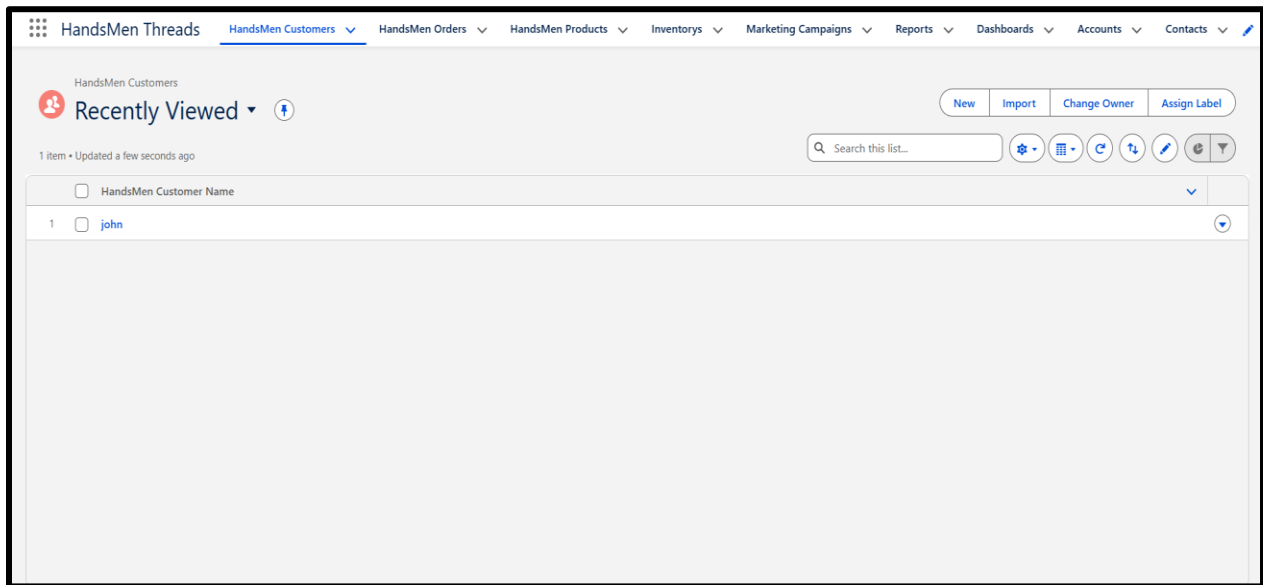
Fig 1: Custom App for HandsMen Threads

Fig 2: Customer Creation

Fig 3: Products Example

Fig: Order Confirmation

CONCLUSION

This Salesforce CRM project for HandsMen Threads successfully demonstrates how technology can enhance operational efficiency within the fashion retail industry. By centralizing customer information, product catalog details, and sales activities into one system, the business can manage its daily operations more effectively and accurately. The implementation of automated workflows such as order confirmations, stock alerts, and loyalty status updates reduces manual workload and improves service delivery. Through real-time access to business data and analytics, the system strengthens decision-making and supports a more personalized customer experience. Overall, the project achieves its goal of improving business processes, boosting customer engagement, and preparing HandsMen Threads for growth and modernization in the competitive fashion market.

Future Scope

As the business continues to expand, additional enhancements can be integrated to further maximize system performance and customer satisfaction.

1. **Customer Feedback & Return Management** – Adding features to capture customer feedback and handle product returns for improved service.

2. **E-commerce Platform Integration** – Connecting Salesforce with online selling channels to unify order processing and inventory tracking.

3. **AI-Driven Product Recommendations** – Utilizing AI tools to recommend items to customers based on past purchases and preferences.

4. **Mobile Accessibility** – Allowing staff to access CRM functions through mobile devices for quicker and more flexible customer assistance.

5. **Marketing Automation Expansion** – Enabling automated promotional campaigns tailored to customer behavior and loyalty status.