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

ABSTACT

This project presents the implementation of a customized Salesforce CRM solution for **HandsMen Threads**, a premium men's fashion and tailoring brand. The objective was to streamline business operations, enhance customer engagement, and maintain data integrity across departments.

The solution involves designing a robust data model featuring five key custom objects: Customer, Order, Product, Inventory, and Marketing Campaign. Business processes were automated using Record-Triggered Flows, Scheduled Flows, Email Alerts, and Apex to handle order confirmations, loyalty status updates, and proactive stock alerts.

To ensure clean and reliable data, validation rules were established, and a role-based security model was implemented for the Sales, Inventory, and Marketing teams. The solution also includes a scheduled batch job using Apex to update low stock quantities

This end-to-end CRM implementation improves customer experience through personalized communication, ensures operational efficiency with automation, and lays a scalable foundation for future business growth using the Salesforce Platform.

OBJECTIVE

The main objective of this project is to develop and implement a customized Salesforce CRM solution for HandsMen Threads to streamline core business operations, maintain data integrity, and enhance customer satisfaction.

By building a centralized system to manage customers, orders, products, inventory, and marketing campaigns, the project aims to:

- **Automate key processes** such as order confirmations, loyalty status updates, and stock alerts.

- **Ensure accurate** and consistent data entry using validation rules.

- **Enable real-time** visibility of inventory and customer interactions.

- **Improve internal team coordination** through role-based access control.

- **Deliver personalized customer experiences** through targeted communication and loyalty programs.

TECHNOLOGY DESCRIPTION

Salesforce

Salesforce is a cloud-based Customer Relationship Management (CRM) platform that helps businesses manage customer data, automate processes, and improve service, marketing, and sales operations. It provides point-and-click tools as well as programmatic capabilities (like Apex and Flows) to build custom business solutions.

Custom Objects

Objects in Salesforce are like tables in a database. Custom Objects are created to store specific data.

Example:

- Customer__c - Stores customer info

- Product__c - Stores product details

- Order__c – Stores orders

Tabs

Tabs are used to display object data in the Salesforce UI.

Example: A tab for Product__c allows users to easily view and manage products

Custom App

An App in Salesforce is a collection of tabs grouped together for specific business purpose.

Profiles

Profiles define what s user can see, do, and edit in Salesforce. It controls object permissions, Fields access, and more.

Roles

Roles control the data visibility in Salesforce's role hierarchy. It's used for sharing settings and reporting.

Permission Sets

Permission Sets grant additional permissions to users without changing their profile.

Validation Rules

Validation Rules ensure that the data entered into Salesforce records meets specific business requirements.

Examples:

- Email Validation: Ensures email addresses contain @gmail.com.
- Stock Quantity Check: Prevents users from entering negative stock values.

Email Templates

Email Templates provide predefined formats for sending consistent, professional emails to customers or internal users.

Example:

- Order Confirmation Template: Sent to customers when their order is confirmed.

Email Alerts

Email Alerts are automated actions that send emails based on specified criteria. They use predefined email templates and are typically triggered by Flows or Workflow Rules.

- When a customer's loyalty level changes, an email alert is triggered and sent to the customer.

Flows

Flows are point-and-click tools in Salesforce used to automate business processes without writing code. Flows can create or update records, send email alerts, or execute logic based on conditions

Example:

- A Flow is triggered when a new order is created, sending an order confirmation email to the customer.

Apex

Apex is Salesforce's object-oriented programming language that allows developers to implement custom business logic.

Example Apex Triggers:

- Update Total_Amount__c in orders.
- Reduce inventory stock

DETAILED EXECUTION OF PROJECT PHASES

1. Developer Org Setup

- Created a Salesforce Developer Org using

  https://developer.salesforce.com/signup

- Verified account and set password, and access was granted to the Salesforce Setup Page.

2. Custom Object Creation

Created 5 custom objects to manage business data:

- **HandsMen Customer**: Stores customer details like name, phone, email, loyalty status

- **HandsMen Product**: Stores product details like SKU, price, and stock quantity

- **HandsMen Order**: Captures customer orders, quantity, and status

- **Inventory**: Tracks product stock and warehouse location

- **Marketing Campaign**: Manages marketing promotions and schedules

Steps followed:

- Navigated to Setup → Object Manager → Create Custom Object

- Entered label and object name

- Enabled reports, search, and created tabs for each object
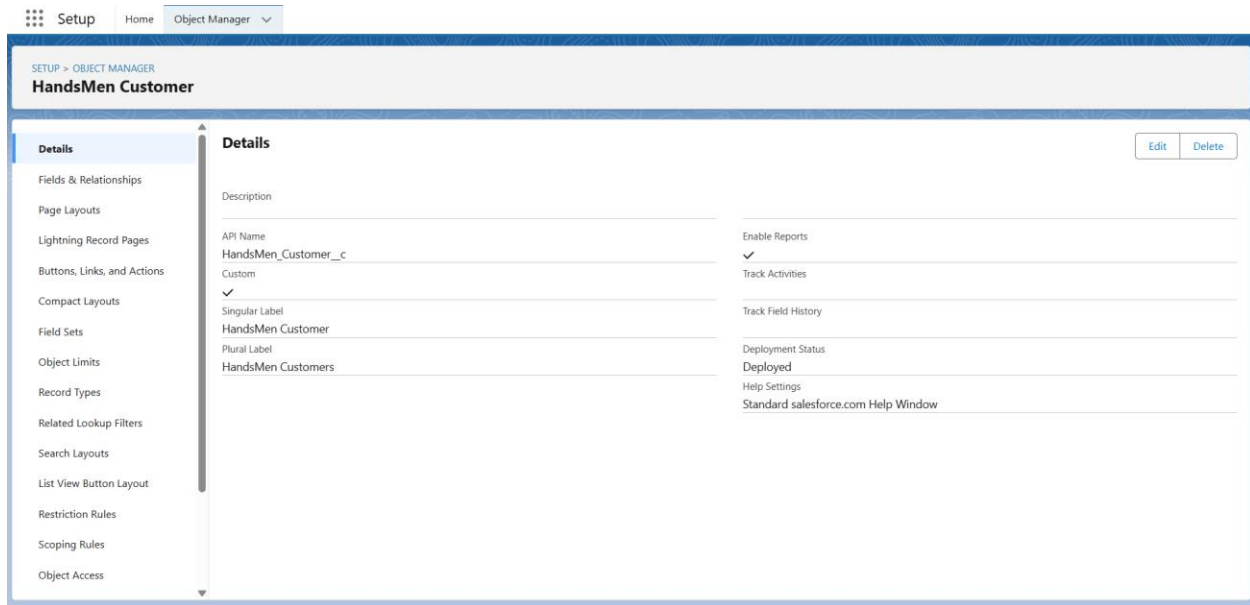
3. Lightning App Creation

- Created a custom Lightning App named HandsMen Threads
- Added tabs for HandsMen Customer, Product, Order, Inventory, Campaigns, and Reports
- Assigned the app to the System Administrator profile

4. Validation Rules

Implemented validation rules to maintain data quality:

- Order Object: Prevent saving if Total Amount = 0
  Error: "Please Enter Correct Amount"
- Customer Object: Email must contain "@gmail.com"
  Error: "Please fill correct Gmail"
- Inventory Object: Stock must not be negative
  Error: "Stock value cannot be negative"

5. User Roles & Profiles

- Cloned Standard User profile to a new profile named Platform 1 and Granted object-level access to custom objects.
- Created roles for departments:
  Sales Manager, Inventory Manager, Marketing Team

6. User Creation

Created Salesforce users with appropriate roles and profiles:

- Niklaus Mikaelson – Assigned Sales role

- Kol Mikaelson – Assigned Inventory role
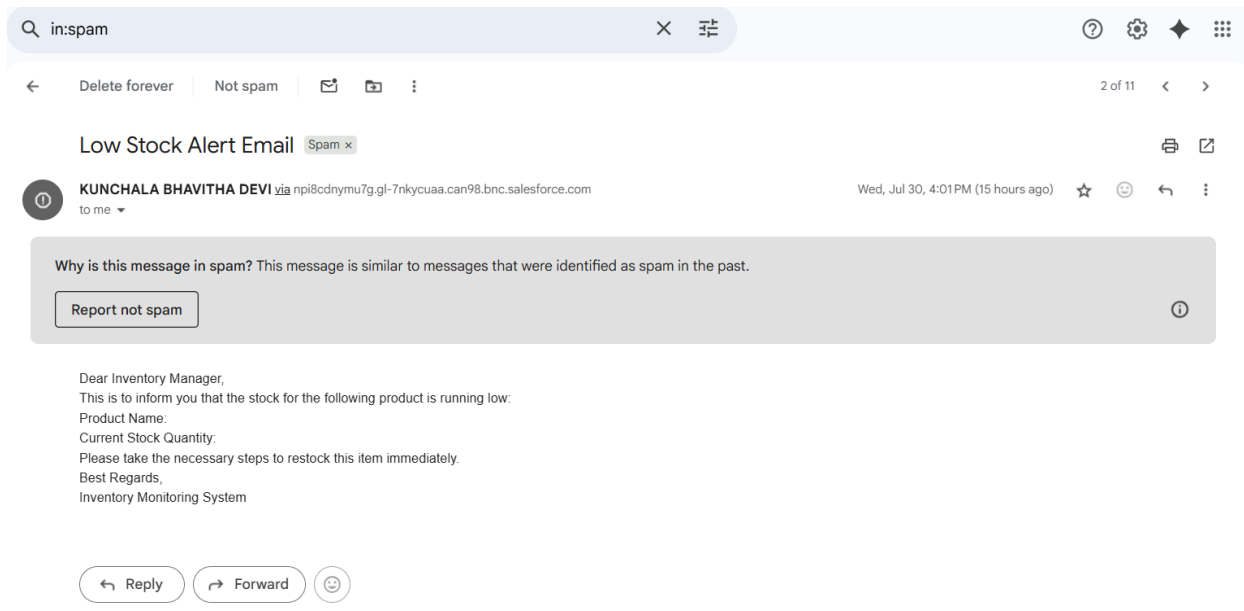
- Roles ensure proper data access and responsibility alignment

7. Email Templates & Alerts

Created 3 email templates:

- Order Confirmation – Sent when order status is confirmed

Dear john,

Your order #O-0001 has been confirmed!

Thank you for shopping with us.

Best Regards,

Sales Team
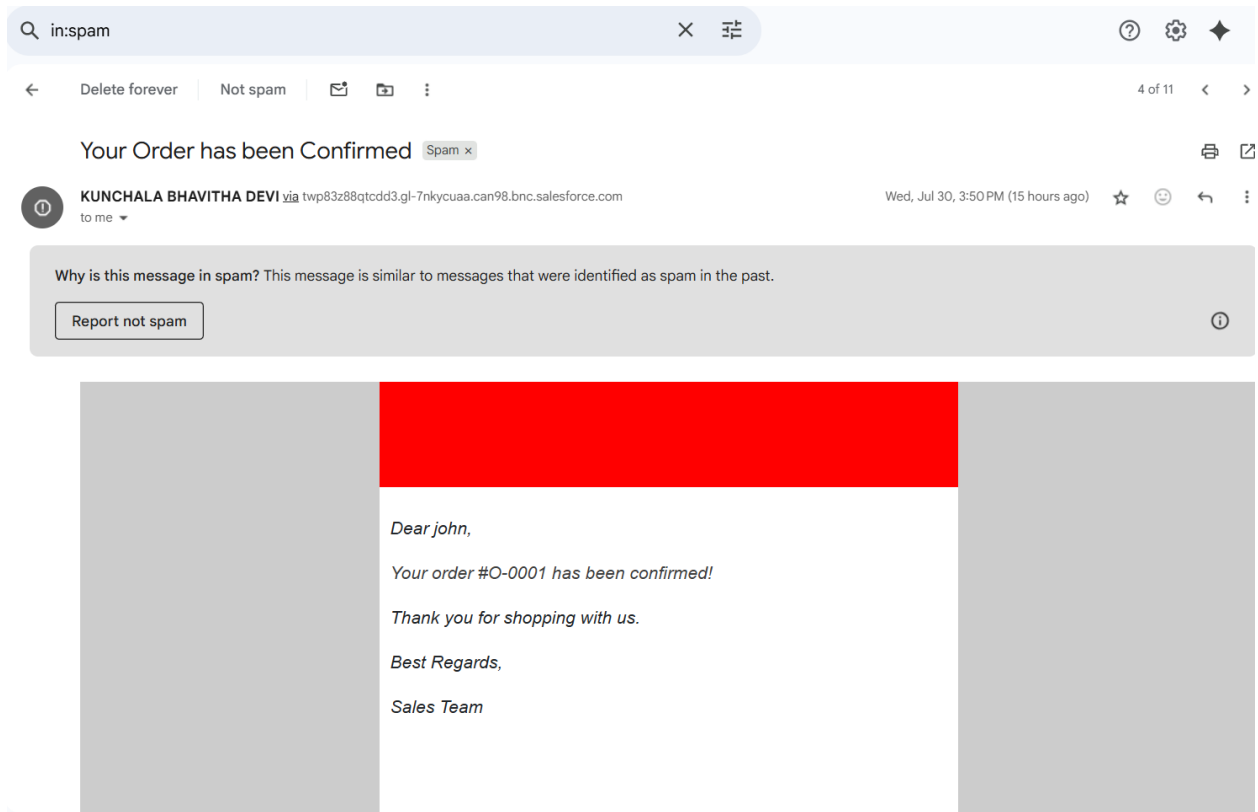
- Low Stock Alert – Sent when inventory quantity < 5

← Delete forever | Not spam ✉ 📁 ⋮   2 of 11 ‹ ›

Low Stock Alert Email Spam ✕   🖨 ⬈

KUNCHALA BHAVITHA DEVI via npi8cdnymu7g.gl-7nkycuaa.can98.bnc.salesforce.com   Wed, Jul 30, 4:01 PM (15 hours ago) ☆ ☺ ↩ ⋮
to me ▾

Why is this message in spam? This message is similar to messages that were identified as spam in the past.

Report not spam   ⓘ

Dear Inventory Manager,
This is to inform you that the stock for the following product is running low:
Product Name:
Current Stock Quantity:
Please take the necessary steps to restock this item immediately.
Best Regards,
Inventory Monitoring System

↩ Reply   → Forward   ☺

- Loyalty Program Email – Sent when customer loyalty status changes

← Delete forever | Not spam ✉ 📁 ⋮   1 of 11 ‹ ›

Loyalty Program Email Spam ✕   🖨 ⬈

OrgFarm EPIC <epic.orgfarm@salesforce.com>   Wed, Jul 30, 4:55 PM (14 hours ago) ☆ ☺ ↩ ⋮
to me ▾

Why is this message in spam? This message is similar to messages that were identified as spam in the past.

Report not spam   ⓘ

Congratulations! You are now a Bronze member and you are eligible
for our Loyalty Rewards Program.
Enjoy exclusive discounts, early access to offers, and special member
benefits.
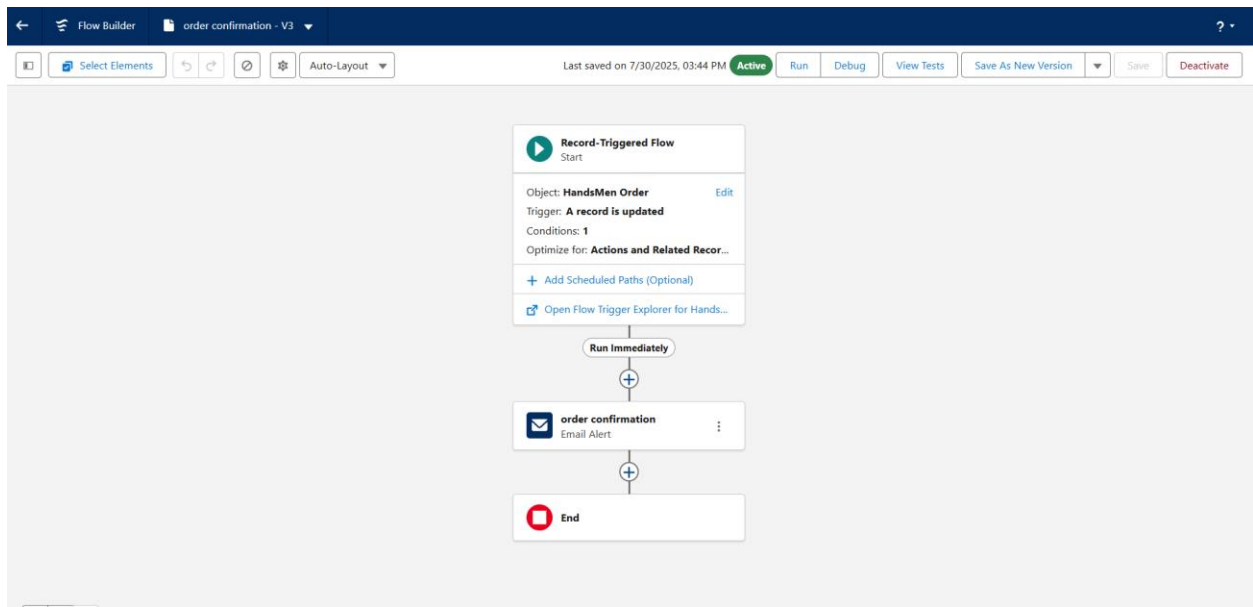Thank you for your continued Support.

Created Email Alerts using these templates and linked email alerts to corresponding flows for automation
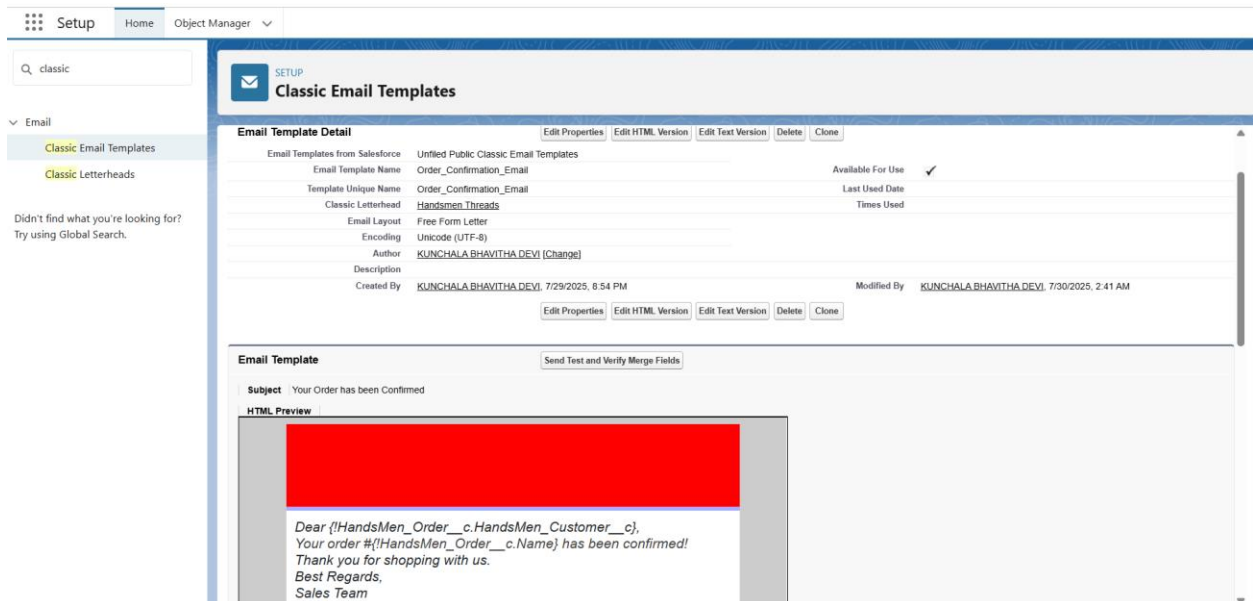
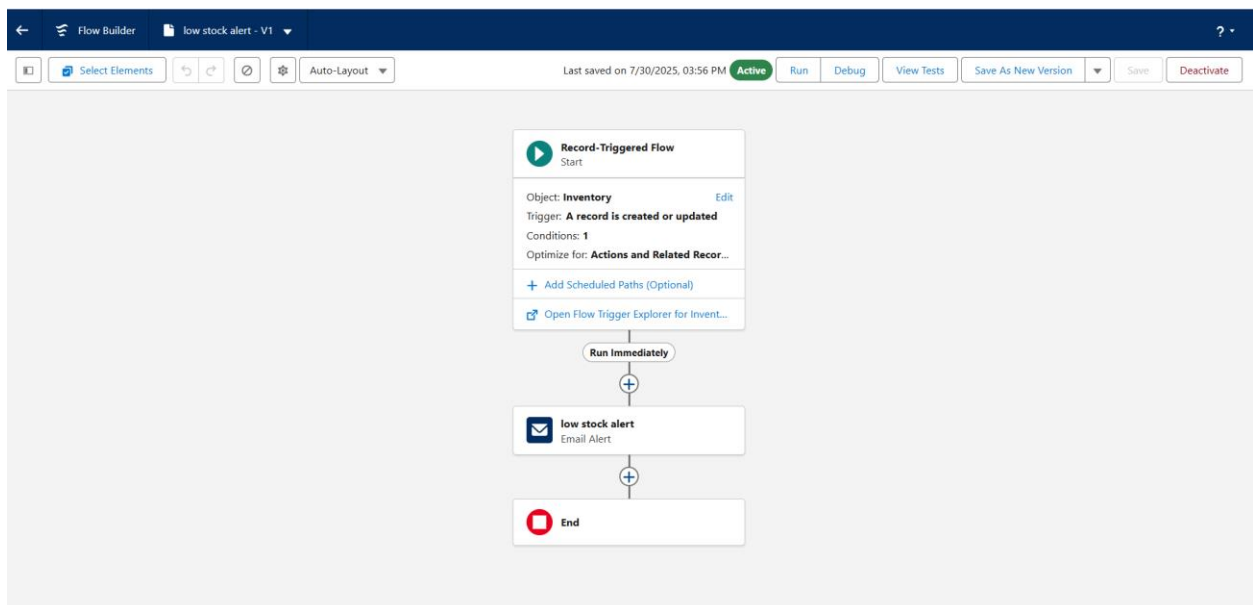## 8. Flow Implementations

a. Order Confirmation Flow

- Triggered when an order is confirmed
- Sends a confirmation email to the customer
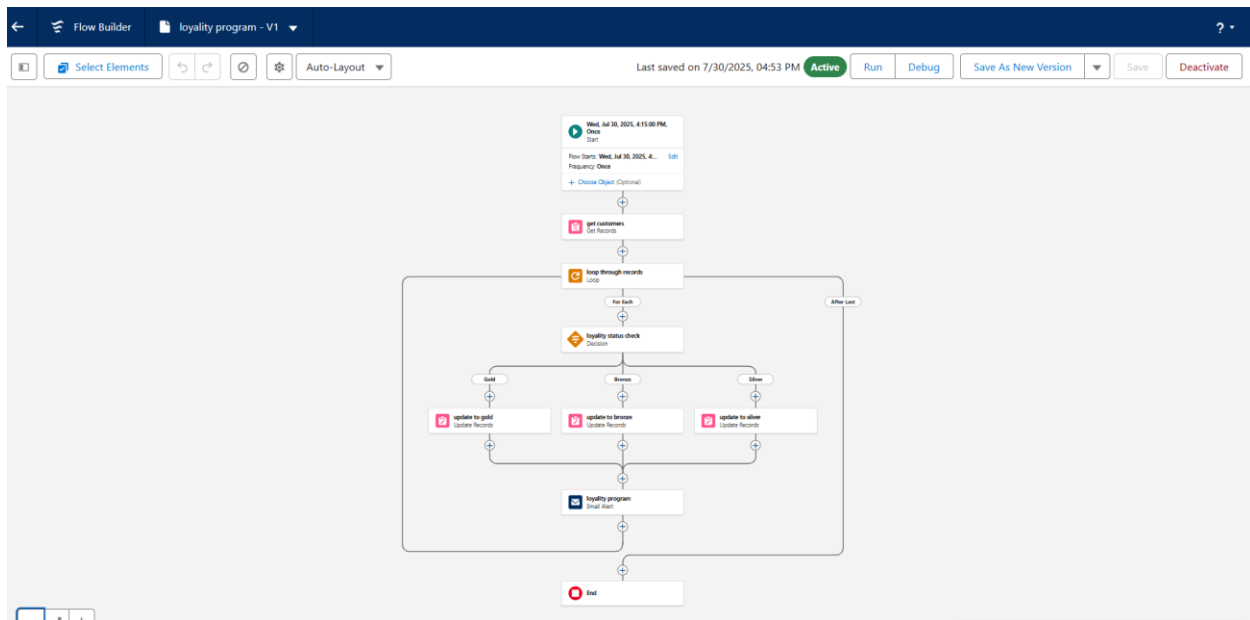
b. Low Stock Alert Flow

- Triggered when inventory falls below 5
- Sends a low stock email to the Inventory Manager.

c. Loyalty Program Flow (Scheduled Flow)

- Runs daily at 05:00 AM

- Loops through all customers

- Updates loyalty status based on total purchases:

Sends email notification with updated status

9. Apex Triggers

- Order Trigger Handler: Auto-calculates order total based on quantity × price
- OrderTrigger: Reduces product inventory after order is placed
- Loyalty Status Trigger: Updates loyalty tier based on total customer purchases

PROJECT EXPLANATION WITH REAL-WORLD PROJECT EXAMPLE

1: Customer Registration

- A customer, Elijah Mikaelson visits the store or website.
- In Salesforce: A record is created in the HandsMen Customer object with his name, phone, email, etc.
- Validation Rule: Email is validated using a rule that requires "@gmail.com"

2: Product Setup

- The admin adds products like Shirts, Jeans, etc., into the Product__c object.
- Each product has a price and other details.
- Inventory is also created to manage stock for these products.

3: Order Placement

- Elijah orders 2 shirts at ₹500 each
- In Salesforce: a new Order record is created
- Apex Trigger: Automatically calculates Total_Amount__c= 2 × 500 = ₹1000.

4: Inventory Update

- Apex Trigger reduces stock by 2
- Validation Rule: Ensures stock never goes below 0.

5: Loyalty Program

- Elijah's total purchase = ₹1000
- A trigger on Customer checks his total purchases.
  Based on the values
  $\geq$ ₹1000 $\rightarrow$ Gold
  ₹501–₹999 $\rightarrow$ Silver
  $\leq$ ₹500 $\rightarrow$ Bronze
- Loyalty Flow updates his status to Silver

6: Email notification

- When a new order is placed or loyalty status is updated:
- Flow + Email Alert is triggered.
- Elijah gets an email:
  "Thanks for your purchase! Your loyalty status is now Silver."

7: Users and Roles

Salesforce users like store staff are created:

- **Niklaus Mikaelson -** Sales Role (Platform 1 Profile)
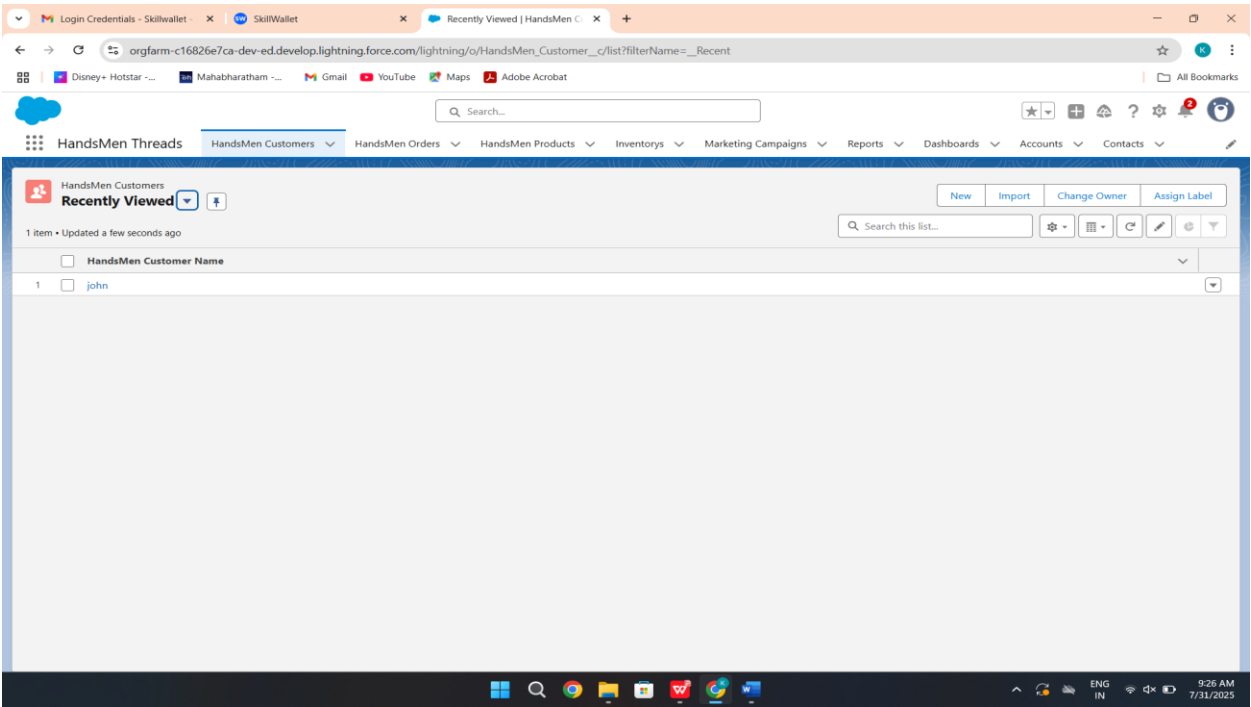- **Kol Mikaelson** - Inventory Role (Platform 1 Profile)
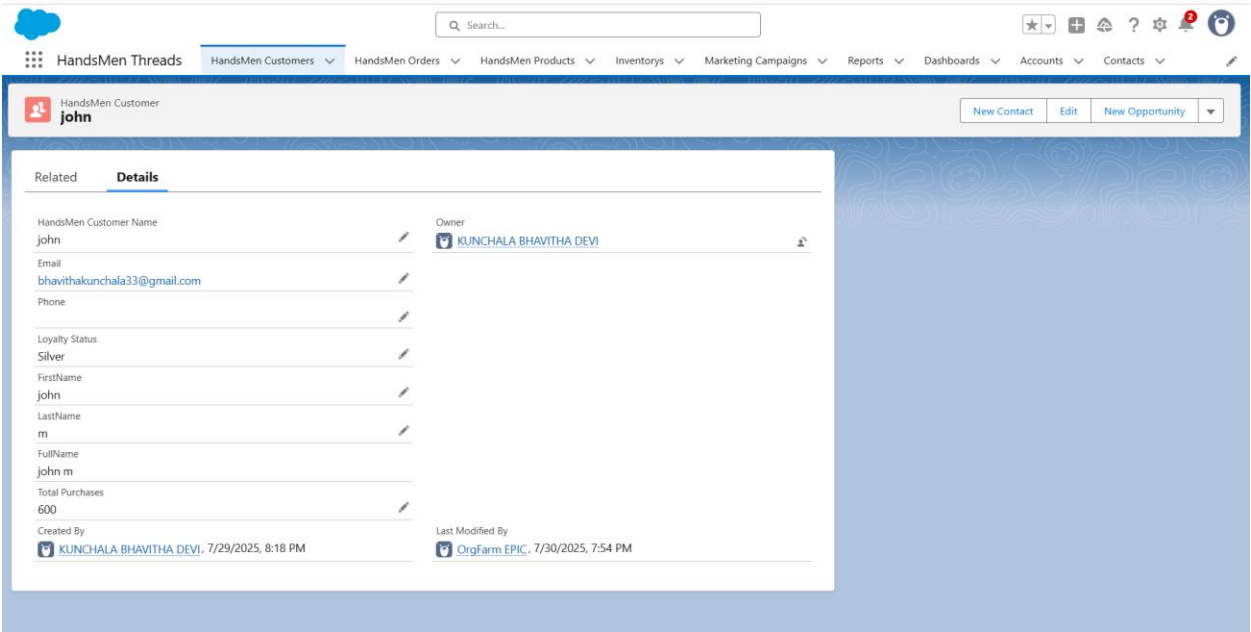
SCREENSHOTS

Fig: Custom App for HandMen Threads
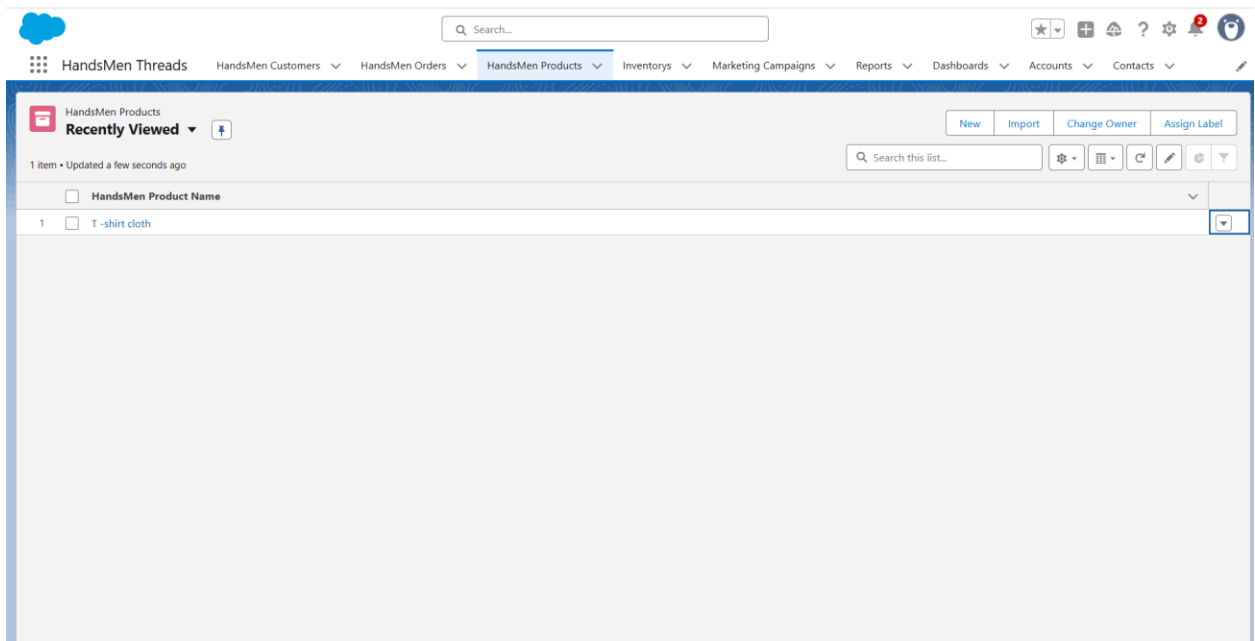

Fig: Customer creation in HandsMen
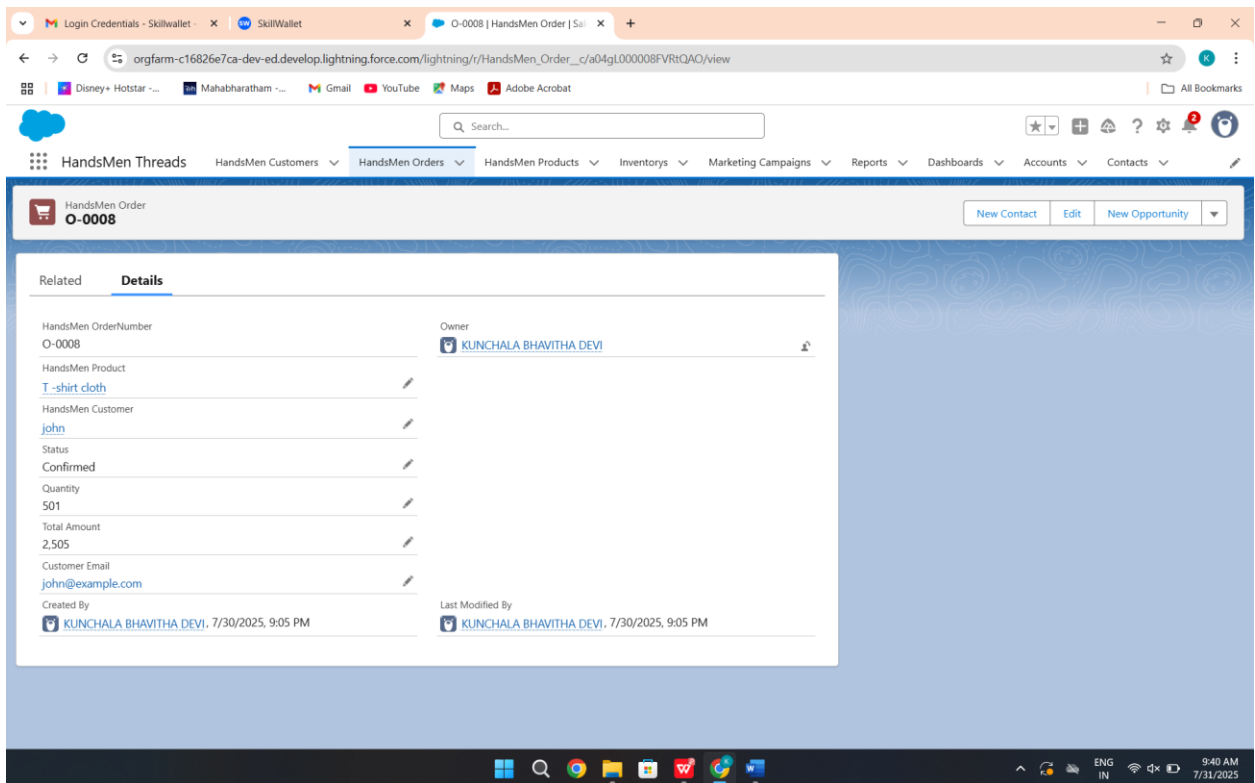
Fig: Products in HandsMen Threads
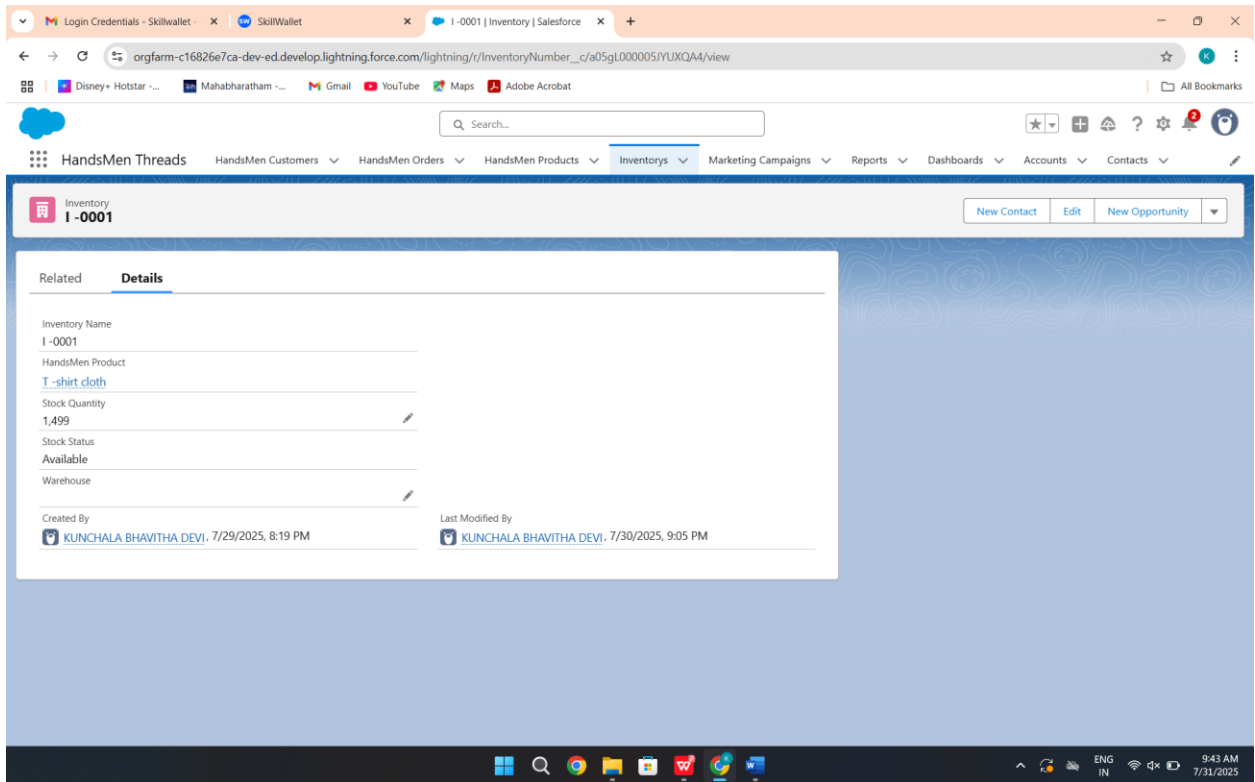

Fig: Order Confirmation

Fig: Inventory

CONCLUSION

The HandsMen Threads CRM system built on Salesforce successfully streamlines key business processes like customer management, product cataloging, order processing. inventory tracking, and loyalty program automation. By leveraging Salesforce tools like Custom Objects, Flows, Validation Rules, Email Alerts, and Apex, the system ensures accurate data entry, real-time updates, and enhanced customer experience. Through. automation and well-structured user roles, the platform minimizes manual errors, speeds up operations, and provides better insights into sales and stock.

Future Scope

1. **Customer Portal Integration**
   - Build a Customer Community Portal where customers can log in, view orders, and track loyalty status.

2. **Mobile App using Salesforce Mobile SDK**
   - Enable store staff to manage inventory and orders on the go using a mobile interface.

3. **Reports & Dashboards**
   - Create detailed sales and inventory dashboards for management to monitor trends and performance in real-time.

4. **AI-Powered Recommendations (Einstein)**
   - Use Salesforce Einstein to provide personalized product suggestions based on past purchases.

5. **WhatsApp/SMS Integration**
   - Notify customers via WhatsApp or SMS about order confirmations and loyalty updates.