

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

ABSTRACT

This project showcases a customized Salesforce CRM system created for the high-end men's apparel and tailoring company HandsMen Threads. Five key custom objects Customer, Order, Product, Inventory, and Marketing Campaign form the foundation of the system and collaborate to support the day-to-day activities of the business. Salesforce Flows, Email Alerts, and Apex were used to automate important processes including order confirmations, loyalty updates, and inventory checks in order to increase speed and accuracy.

To ensure reliable and secure data, the solution includes validation rules and a role-based security setup for the Sales, Inventory, and Marketing teams. A scheduled Apex batch job also helps monitor low stock levels. Overall, this CRM delivers a smoother customer experience, reduces manual work, and sets up a scalable structure for the company's future growth.

OBJECTIVES

- Developed a centralized Salesforce CRM integrating customer, order, inventory, and marketing data for HandsMen Threads.
- Automated key business processes using Flows, Email Alerts, and Apex to improve efficiency and minimize manual work.
- Enhanced customer engagement through personalized automated communications such as order confirmations, loyalty notifications, and marketing campaigns.
- Ensured data accuracy and security with validation rules, record-level protection, and role-based access for Sales, Inventory, and Marketing teams.
- Established a scalable CRM foundation to support future business growth and expansion of operations.
- Improved inventory management through automated low-stock alerts and scheduled Apex batch updates for optimal stock control.

TECHNOLOGY DESCRIPTION

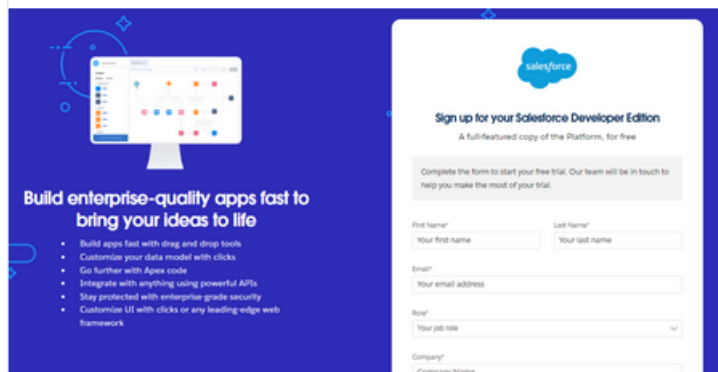
This project uses Salesforce, a cloud-based CRM platform, to build a complete business solution for HandsMen Threads by allowing custom objects, automated workflows, and secure data storage without needing any internal infrastructure. Key features like Flows, Email Alerts, Validation Rules, Reports, Dashboards, and Apex help automate tasks, keep data accurate, and handle advanced actions such as bulk stock updates. With role-based security, only authorized team members can access sensitive information, and its cloud design lets users work from any device at any time. Overall, Salesforce streamlines operations, improves data tracking, and delivers a more personalized experience for both the business and its customers.

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. 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

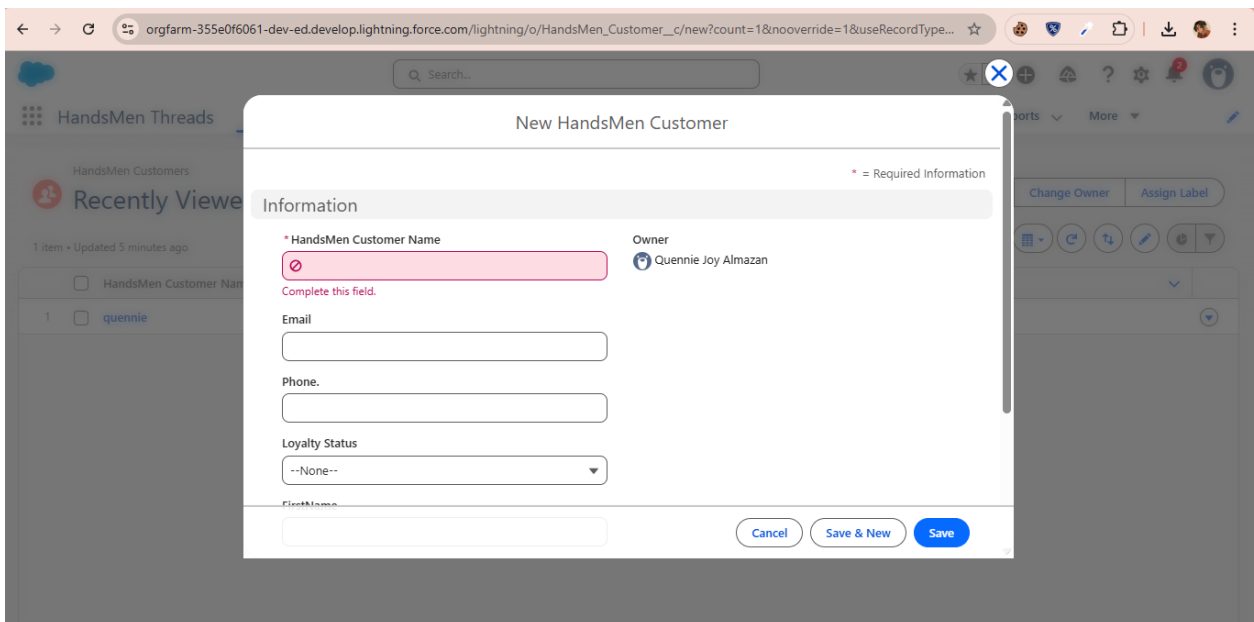
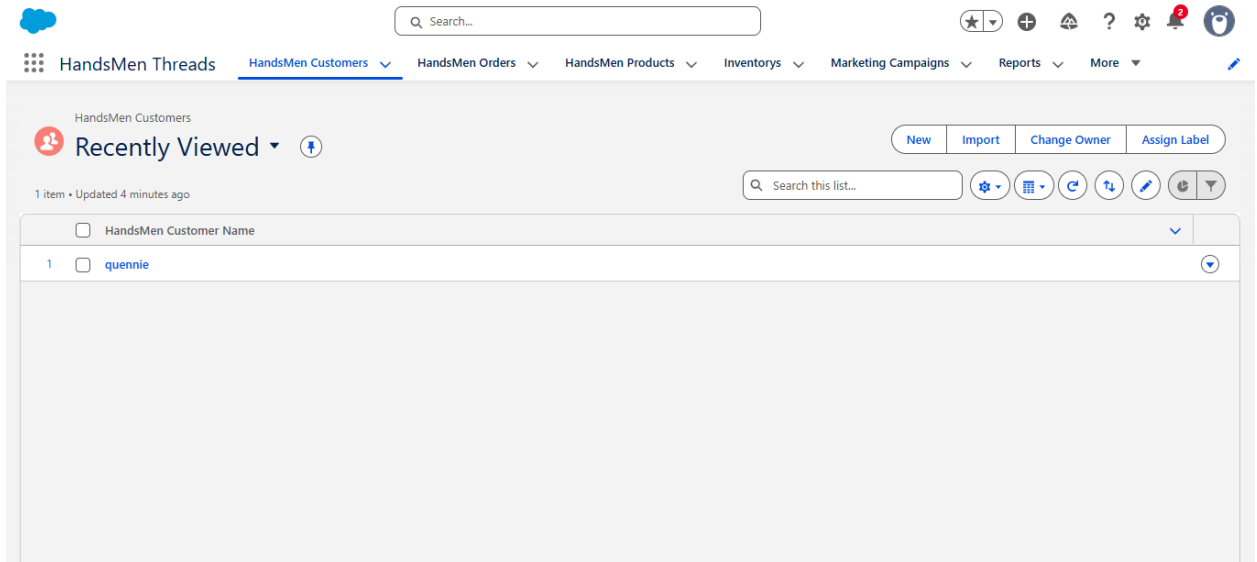
8.Creating Automation using Apex

Automation using Apex


Create Apex Class

CREATED COMPONENTS

HandsMen Customer



HandsMen Orders



Search...

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⚙️

🔴 2

👤

HandsMen Threads

HandsMen Customers

HandsMen Orders

HandsMen Products

Inventories

Marketing Campaigns

Reports

More

HandsMen Orders

🛒 Recently Viewed

⬆

New

Import

Change Owner

Assign Label

4 items • Updated a few seconds ago

Search this list...

⚙️

📄

🔄

✎

🗑️

🔍

<input type="checkbox"/>	HandsMen OrderNumber	
1 <input type="checkbox"/>	O-0005	⬇
2 <input type="checkbox"/>	O-0003	⬇
3 <input type="checkbox"/>	O-0001	⬇
4 <input type="checkbox"/>	O-0002	⬇

orgfarm-355e0f6061-dev-ed.develop.lightning.force.com/lightning/o/HandsMen_Order__c/new?count=2&nooverride=1&useRecordTypeChe...

Search...

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HandsMen Threads

HandsMen Orders

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Change Owner

Assign Label

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🔍

New HandsMen Order

* = Required Information

Information

HandsMen OrderNumber

Owner

👤 Quennie Joy Almazan

HandsMen Product

Search HandsMen Products...

HandsMen Customer

Search HandsMen Customers...

Status

--None--

Quantity


Total Amount

Cancel








Save & New

Save

HandsMen Products



Search...



HandsMen Threads

HandsMen Customers

HandsMen Orders

HandsMen Products

Inventories

Marketing Campaigns

Reports

More








HandsMen Products

Recently Viewed

NewImportChange OwnerAssign Label

1 item • Updated a few seconds ago

Search this list...



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

orgfarm-355e0f6061-dev-ed.develop.lightning.force.com/lightning/o/HandsMen_Product__c/new?count=3&nooverride=1&useRecordTypeC...

HandsMen Threads

HandsMen Products

Recently Viewed

1 item • Updated a few seconds ago

☐ HandsMen Product Name

1 ☐ T-shirt Cloth

New HandsMen Product

* = Required Information

Information

* HandsMen Product Name

Owner

SKU

Price

Stock Quantity

Quennie Joy Almazan

Cancel

Save & New

Save

🔍 Search...



More ▼

Recently Viewed ▾



New

Import

Assign Label

1 item • Updated a few seconds ago

🔍 Search this list...



orgfarm-355e0f6061-dev-ed.develop.lightning.force.com/lightning/o/Inventory__c/new?count=7&nooverride=1&useRecordTypeCheck=1&n...

New Inventory

* = Required Information

Information

Inventory Number

* HandsMen Product

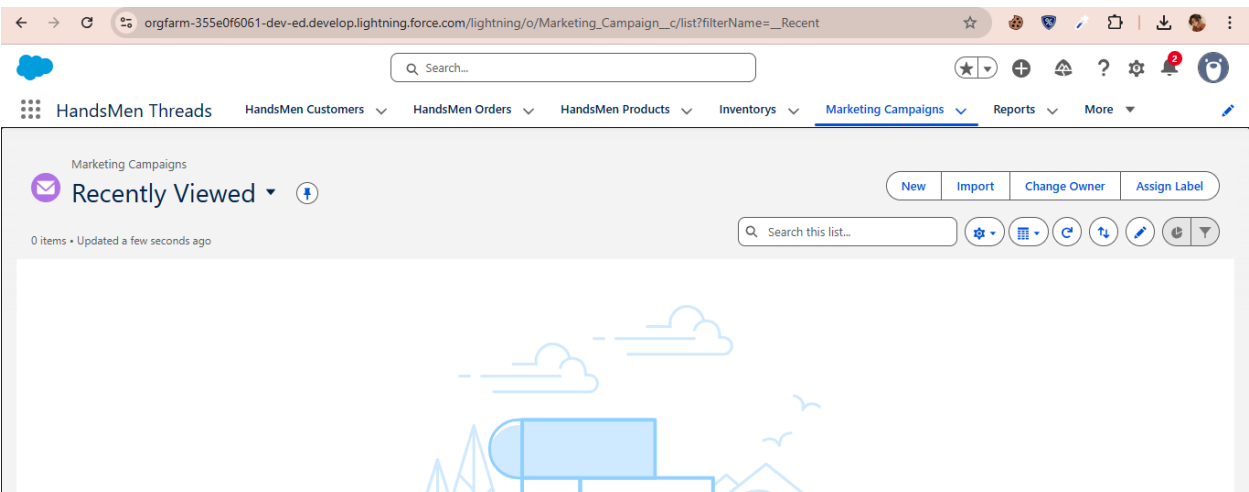
Search HandsMen Products...

Stock Quantity

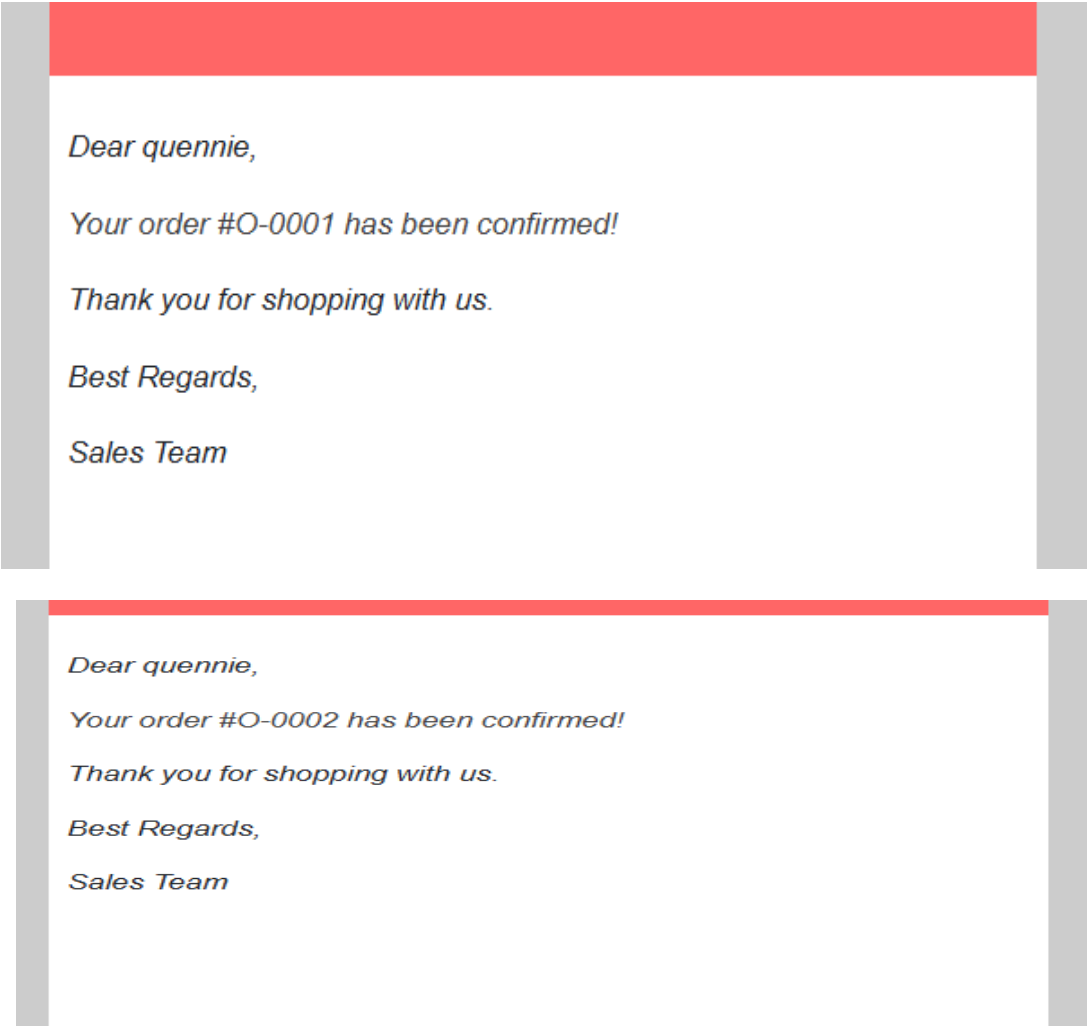
Warehouse

Cancel Save & New Save

Marketing Campaigns



Order Confirmation



Low Stock Alert Email

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

The Salesforce CRM created for HandsMen Threads centralizes customer, order, product, inventory, and marketing data, increasing overall business productivity. The system provides faster, more accurate operations by reducing manual labor using automated procedures including Flows, Email Alerts, and Apex. Role-based access and validation criteria improve data security and integrity, while automated inventory monitoring facilitates improved stock management. All things considered, this CRM improves customer satisfaction, streamlines productivity, and lays a solid platform for the business's future expansion.