

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

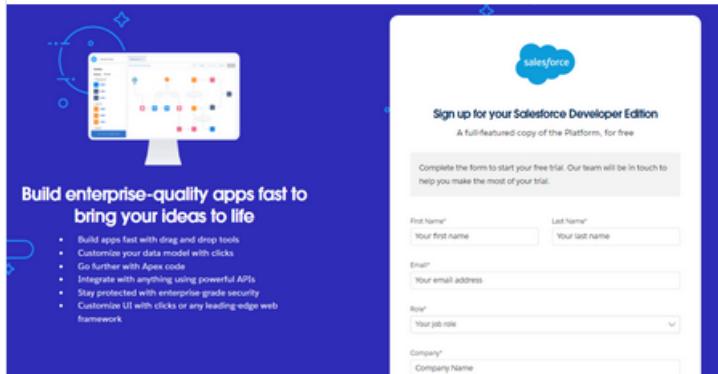
This project uses Salesforce, a cloud-based CRM platform, to build a complete business solution for HandsMen Threads by allowing custom objects, automated workflows, and secure data storage without needing any internal infrastructure. Key features like Flows, Email Alerts, Validation Rules, Reports, 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 :



The image contains two side-by-side screenshots. The left screenshot shows a landing page with a blue header and a central image of a computer monitor displaying a dashboard. Below the image, text reads 'Build enterprise-quality apps fast to bring your ideas to life' and a bulleted list of features: 'Build apps fast with drag and drop tools', 'Customize your data model with clicks', 'Go further with Apex code', 'Integrate with anything using powerful APIs', 'Stay protected with enterprise grade security', and 'Customize UI with clicks or any leading-edge web framework'. The right screenshot shows a sign-up form titled 'Sign up for your Salesforce Developer Edition' with a subtext 'A full-featured copy of the Platform, for free'. It includes fields for 'First Name*', 'Last Name*', 'Email*', 'Role*', and 'Company*'. A note below the form says 'Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.'

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

This screenshot shows the HandsMen Customer list view. At the top, there's a navigation bar with links for HandsMen Threads, HandsMen Customers (which is the active tab), HandsMen Orders, HandsMen Products, Inventory, Marketing Campaigns, Reports, and More. Below the navigation is a search bar and a toolbar with icons for New, Import, Change Owner, and Assign Label. A "Recently Viewed" section shows a single item: "quennie". On the right, there's a detailed view of the selected customer record.

This screenshot shows the "New HandsMen Customer" dialog box. The title bar says "New HandsMen Customer". The main area is titled "Information" and contains the following fields:

- "* HandsMen Customer Name": The input field is empty and highlighted in pink, with an error message "Complete this field." displayed below it.
- "Owner": Shows the user "Quennie Joy Almazan" with a small profile icon.
- "Email": An empty input field.
- "Phone": An empty input field.
- "Loyalty Status": A dropdown menu showing "--None--".
- "First Name": An empty input field.

At the bottom of the dialog are three buttons: "Cancel", "Save & New", and a large blue "Save" button.

HandsMen Orders

This screenshot shows the HandsMen Orders list view in a Salesforce Lightning interface. The top navigation bar includes links for HandsMen Threads, HandsMen Customers, HandsMen Orders (selected), HandsMen Products, Inventory, Marketing Campaigns, Reports, and More. A search bar and various navigation icons are also present. The main area displays a "Recently Viewed" section with a shopping cart icon and a dropdown menu. Below it is a table listing four items, each with a checkbox and a link labeled "O-XXXX". A toolbar at the bottom right of the table provides options for New, Import, Change Owner, and Assign Label. A secondary search bar and filter icons are located above the table.

This screenshot shows the "New HandsMen Order" form in a Salesforce Lightning interface. The title bar indicates the current page is "New HandsMen Order". The form is divided into sections: "Information" and "Details". The "Information" section contains fields for "HandsMen OrderNumber" (with a note that it's required), "Owner" (set to Quennie Joy Almazan), "HandsMen Product" (a search bar with placeholder "Search HandsMen Products..."), "HandsMen Customer" (a search bar with placeholder "Search HandsMen Customers..."), "Status" (a dropdown menu set to "--None--"), and "Quantity" (a text input field). The "Details" section is partially visible. At the bottom of the form are three buttons: "Cancel", "Save & New", and "Save". The background shows a blurred view of the HandsMen Orders list view from the previous screenshot.

HandsMen Products

This screenshot shows the HandsMen Products list view. At the top, there's a navigation bar with links for HandsMen Threads, Customers, Orders, Products (which is the active tab), Inventory, Marketing Campaigns, Reports, and More. Below the navigation is a search bar and a toolbar with icons for New, Import, Change Owner, and Assign Label. A "Recently Viewed" section shows a single item: "T-shirt Cloth". The main list area displays one item, "T-shirt Cloth", with a checkbox next to it.

This screenshot shows the "New HandsMen Product" creation dialog. The title bar says "New HandsMen Product". It includes a note that "* = Required Information". The "Information" section contains fields for "HandsMen Product Name" (with a required indicator *), "SKU", "Price", and "Stock Quantity". To the right of the "HandsMen Product Name" field, it shows the "Owner" as "Quennie Joy Almazan". At the bottom of the dialog are three buttons: "Cancel", "Save & New", and "Save". The background shows the same HandsMen Products list view as the previous screenshot.

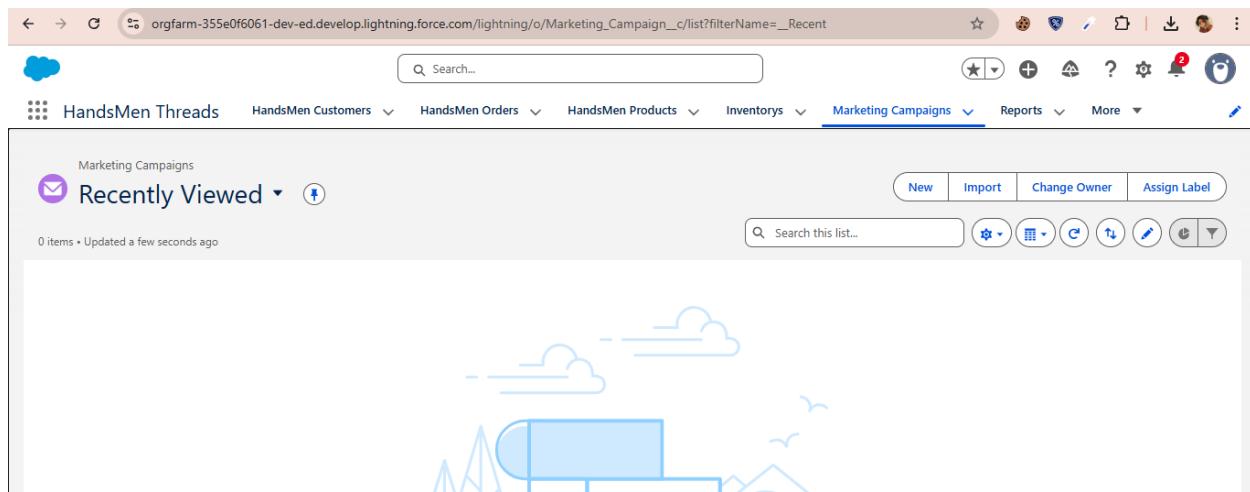
Inventory

The screenshot displays the HandsMen Threads Salesforce Lightning interface. At the top, there is a navigation bar with links for HandsMen Threads, Customers, Orders, Products, Inventory (selected), Marketing Campaigns, Reports, and More. Below the navigation bar is a search bar and a toolbar with various icons.

The main area shows a list titled "Recently Viewed" with one item: "I-0001". There is a "Search this list..." input field and a set of filter and sorting icons.

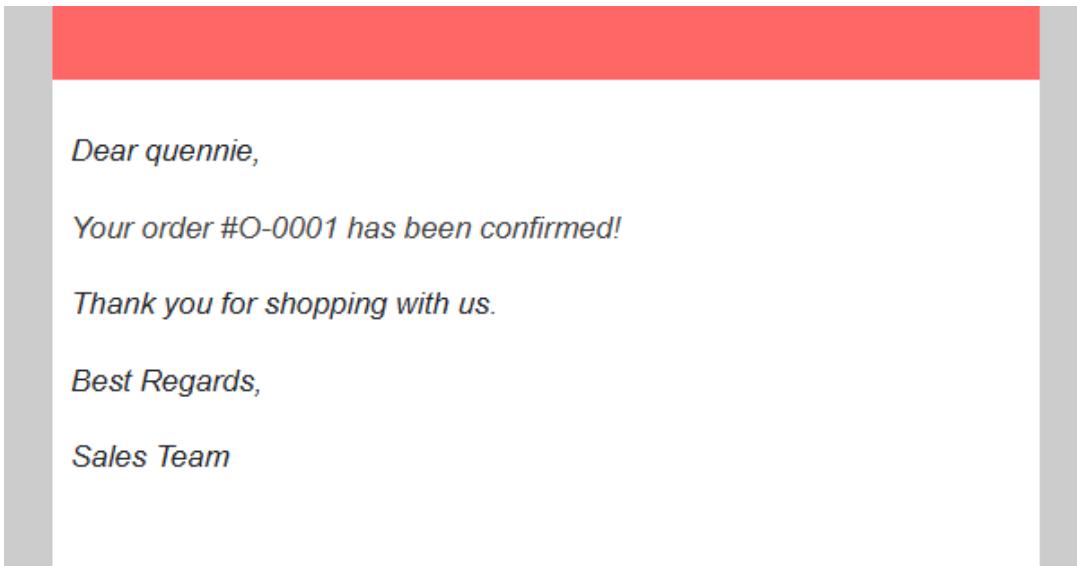
A modal window titled "New Inventory" is open in the center. It has a tab labeled "Information". The "Inventory Number" field contains "I-0001". The "HandsMen Product" field is a search bar with placeholder text "Search HandsMen Products...". The "Stock Quantity" and "Warehouse" fields are empty. At the bottom of the modal are three buttons: "Cancel", "Save & New", and "Save".

Marketing Campaigns



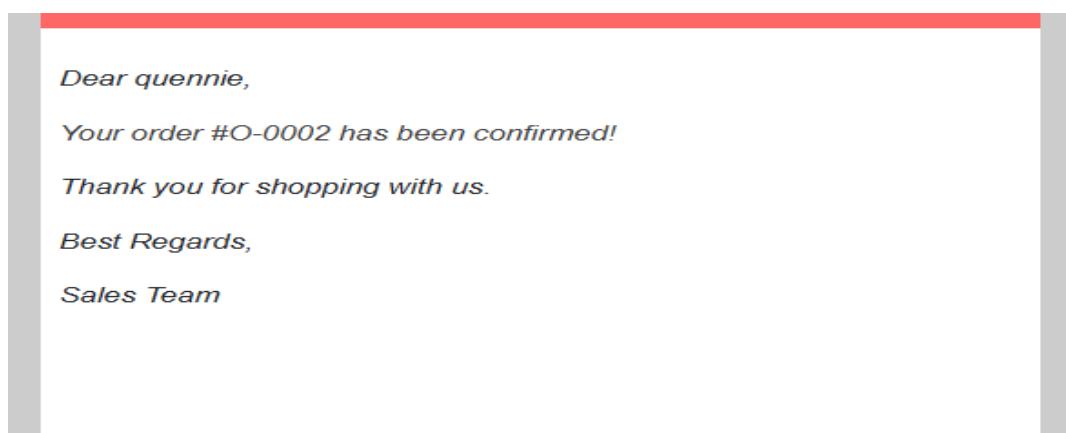
A screenshot of a Salesforce Lightning interface titled "Marketing Campaigns". The top navigation bar includes links for "HandsMen Threads", "HandsMen Customers", "HandsMen Orders", "HandsMen Products", "Inventory", "Marketing Campaigns" (which is currently selected), "Reports", and "More". A search bar at the top right contains the placeholder "Search...". Below the navigation, there's a "Recently Viewed" section with a mail icon and a dropdown menu. A "New" button is located in the top right corner of the main content area. The main content area features a decorative background illustration of a blue train moving through a landscape with clouds and birds. A search bar with the placeholder "Search this list..." is positioned above a set of circular icons for filtering and sorting.

Order Confirmation



A template for an "Order Confirmation" email. It features a red header bar and a white body. The body contains the following text:

Dear quennie,
Your order #O-0001 has been confirmed!
Thank you for shopping with us.
Best Regards,
Sales Team



A second template for an "Order Confirmation" email, similar in structure to the first. It features a red header bar and a white body. The body contains the following text:

Dear quennie,
Your order #O-0002 has been confirmed!
Thank you for shopping with us.
Best Regards,
Sales Team

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.