Report

On

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

Index

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

Overview

The HandsMen Threads CRM project, targeting an affluent men's fashion brand, was about developing a customized Salesforce-driven system to automate their internal processes and optimize customer experience. It was aimed to build a centralized, automated space that manages essential activities like orders, customer handling, stock monitoring, and marketing campaigns in an efficient manner.

Custom data structures were created for holding major business objects such as customers, orders, products, inventory, and marketing campaigns. The application leverages automation resources (such as flows and Apex logic) to trigger notifications, control inventory quantities, and award loyalty points. Data integrity and access controls were provided by validation mechanisms and role-based security configurations.

By incorporating these pieces, the solution provides a smarter, more responsive means of handling operations while setting a strong foundation for future scalability in the Salesforce-platform.

Objective

The core objective of the project was to create a tailored CRM to meet the specific working needs of HandsMen Threads. These comprised:

- Automation of end-to-end processes.

- Offering customized engagement plans for customers.

- Maintaining consistency and accuracy of data across departments.

- Having a single platform for order handling, inventory, and marketing.

- Enhancing cross-functional collaboration through controlled access rights.

Key Functional Objectives:

Automation: Automate routine workflows such as order confirmation emails and loyalty status updates.

Data Accuracy: Minimize input errors with validation rules and standard forms.

Real-Time Insights: Provide teams with instant visibility into customer information and inventory levels.

Secure Role-Based Access: Allot users roles (e.g., Sales, Inventory, Marketing) with the corresponding permissions.

Targeted Marketing: Target offers and loyalty rewards based on customer behavior.

Technology Description

Salesforce Overview:
Salesforce is a cloud-powered Customer Relationship Management (CRM) platform that empowers businesses to efficiently handle customer data, automate routine tasks, and streamline sales, service, and marketing workflows. It offers both **declarative tools** like **Flows** and **programmatic features** like **Apex** to build customized and scalable business solutions.

1. **Custom Objects:**
Custom Objects function like database tables in Salesforce. They are specifically designed to store data that aligns with an organization's unique business needs.
Examples:
Customer__c: Contains customer details (e.g., name, email, loyalty tier).
Product__c: Holds product information such as SKU, price, and stock.
Order__c: Logs purchase transactions and order statuses.

2. **Tabs:**
Tabs provide a user-friendly interface to view and interact with the data stored in objects.
Example:
   - The Product__c Tab allows users to browse, add, and edit product records directly through the UI.

3. Custom Applications

Custom Apps in Salesforce group together relevant tabs and functionality under one application, tailored to specific use cases—such as inventory tracking or order management.

4. Profiles

Profiles define a user's baseline permissions—what objects they can access, what actions they can perform (read, edit, delete), and which UI elements are visible to them.

5. Roles

Roles control the level of record visibility based on an organizational hierarchy. They determine what data users can view or report on, depending on their position.

6. Permission Sets

Permission Sets are flexible tools that allow administrators to assign additional privileges to users without modifying their core profiles. This ensures granular access control.

7. Validation Rules

Validation Rules ensure that the data entered into the system adheres to certain standards, thereby reducing errors and maintaining consistency.

Examples:

- Email addresses must contain "@gmail.com".
- Stock quantities cannot be negative.

8. Email Templates

These are pre-designed formats used to send standardized emails to customers or internal staff.

Example:

- An "Order Confirmation" email is automatically sent to customers after a successful purchase.

9. Email Alerts

Email Alerts are system-generated notifications sent in response to specific triggers or conditions, often tied to workflows or flows.

Example:

- When a customer's loyalty tier changes, an alert is emailed to inform them of the update.

10. Flows

Flows are automation tools in Salesforce that allow users to design processes such as updating records, sending emails, or executing logic—all without writing code.

Example:

- A flow automatically notifies a customer when their order status is updated.

11. Apex

Apex is Salesforce's proprietary programming language, used to implement complex logic beyond what declarative tools can handle. It supports triggers, classes, and batch jobs.

Examples of Apex Usage:

- Automatically calculate total order amount based on quantity $\times$ price.
- Deduct ordered items from inventory in real-time.

Step-by-Step Implementation of Project Stages

1. Developer Org Configuration

A sole Salesforce Developer Org was created through developer.salesforce.com/signup.

After registration, the account was confirmed, login credentials were set, and complete access to the Salesforce Setup menu was provided.


2. Custom Object Creation

Five custom objects were created and set up to capture key business data:

- HandsMen Customer – Stores customer information such as email, contact number, and loyalty level.
- HandsMen Product – Stores product catalog details like SKU, price, and quantity.
- HandsMen Order – Stores customer purchases, quantity, and order status.
- Inventory – Stores available stock and warehouse location per item.
- Marketing Campaign – Stores campaign schedules, target groups, and promo data.

Steps Used:

- Accessed Setup → Object Manager → Create → Custom Object
- Defined object labels, names, enabled search/report settings
- Created corresponding tabs for each object for UI accessibility
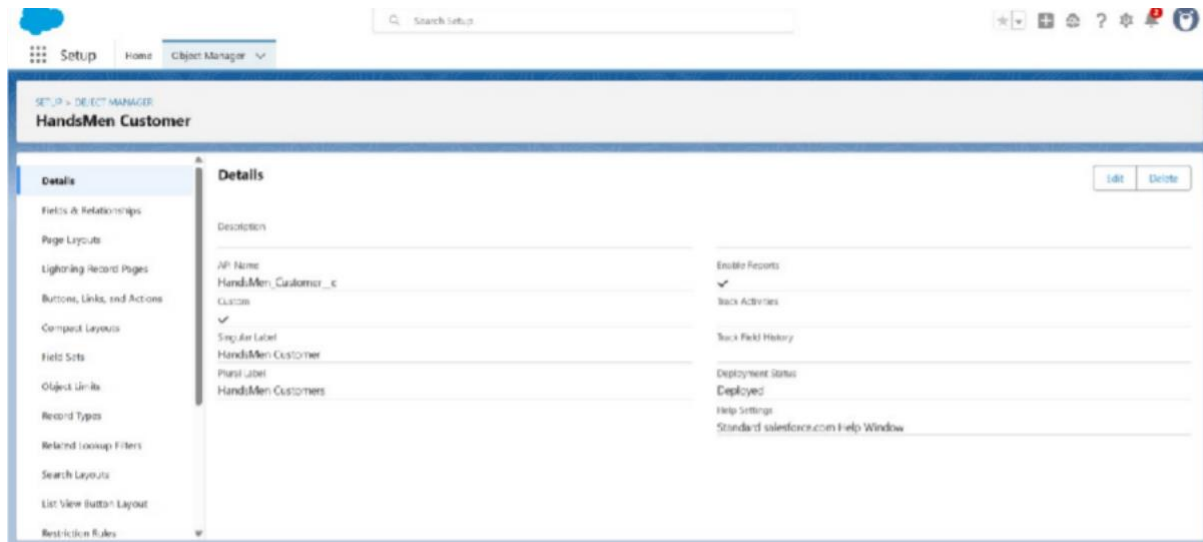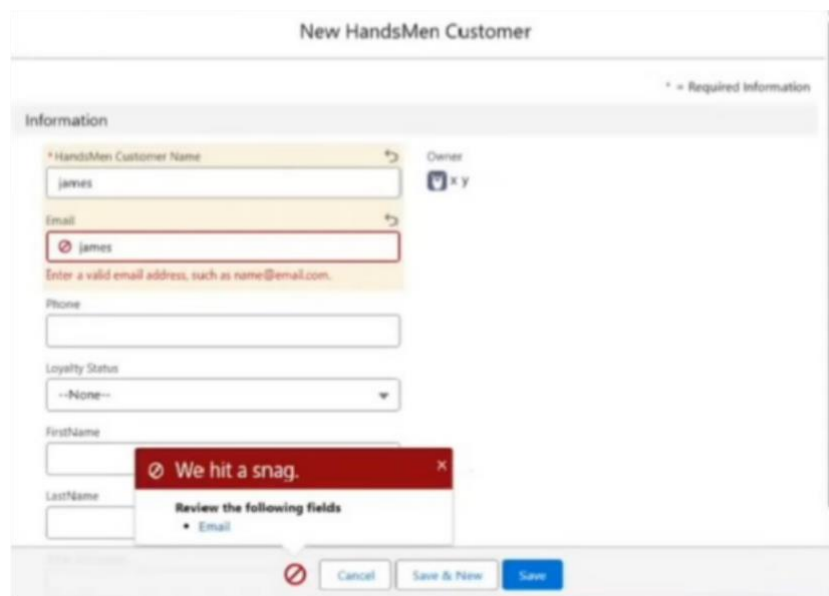

3. Creating the Lightning App

- A Lightning App named "HandsMen Threads" was created to consolidate CRM activities.
- Tabs Included:
    - HandsMen Customer
    - Order
    - Product
    - Inventory
    - Marketing Campaign
    - Reports
- The application was deployed to the System Administrator profile for unrestricted access.

4. Validation Rules

To impose business logic and maintain data integrity, the following validation rules were set:

- **Order Object:** Forbids submission of orders with total amount ≤ 0.
  Error Message: "Please enter a valid order amount."
- **Customer Object:** Ensures that the email has @gmail.com.
  Error Message: "Please enter a valid Gmail address."

## 5. Role and Profile Configuration

- A new profile called Platform 1 was created through cloning the Standard User profile.
- Access to all appropriate custom objects was provided.
- User Roles Defined:
    - Sales Manager – Manages customer acquisition and order processes
    - Inventory Manager – Tracks product availability and stock updates
    - Marketing Team – Manages campaigns and customer engagement

6. User Setup and Assignment

Users were added and assigned to roles and profiles based on their tasks:

- Niklaus Mikaelson → Role assigned: Sales Manager
- Kol Mikaelson → Role assigned: Inventory Manager

This role-based configuration ensures access control and facilitates clear functional segregation.
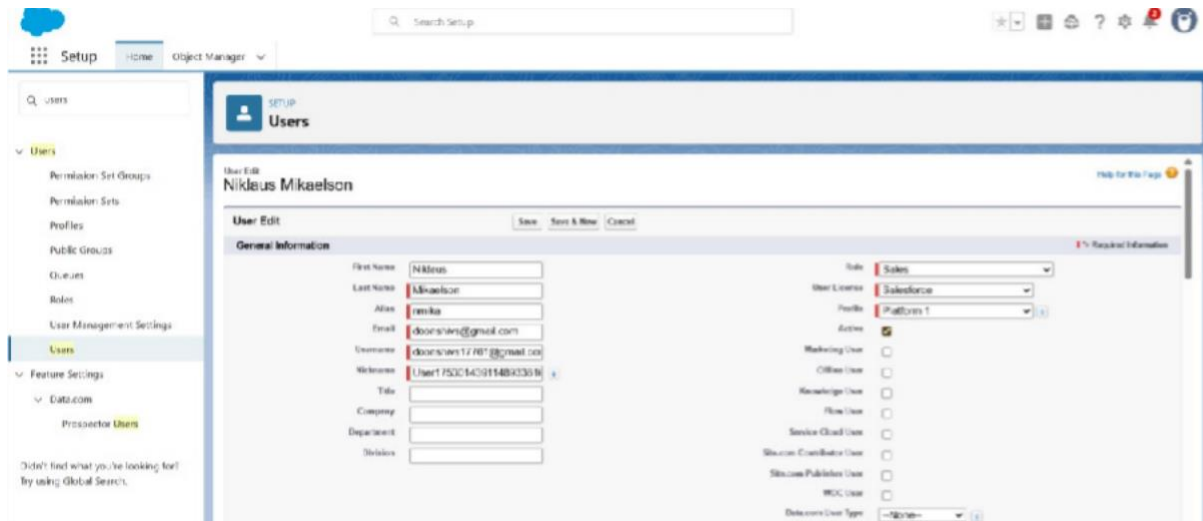
7. Email Templates & Alerts

Three dynamic email templates were created to facilitate business communication workflows:

- Order Confirmation Email – Triggers when an order status is updated to Confirmed
- Low Stock Notification – Sent when product amount decreases below 5 units
- Loyalty Tier Update – Sent when customer's loyalty status changes
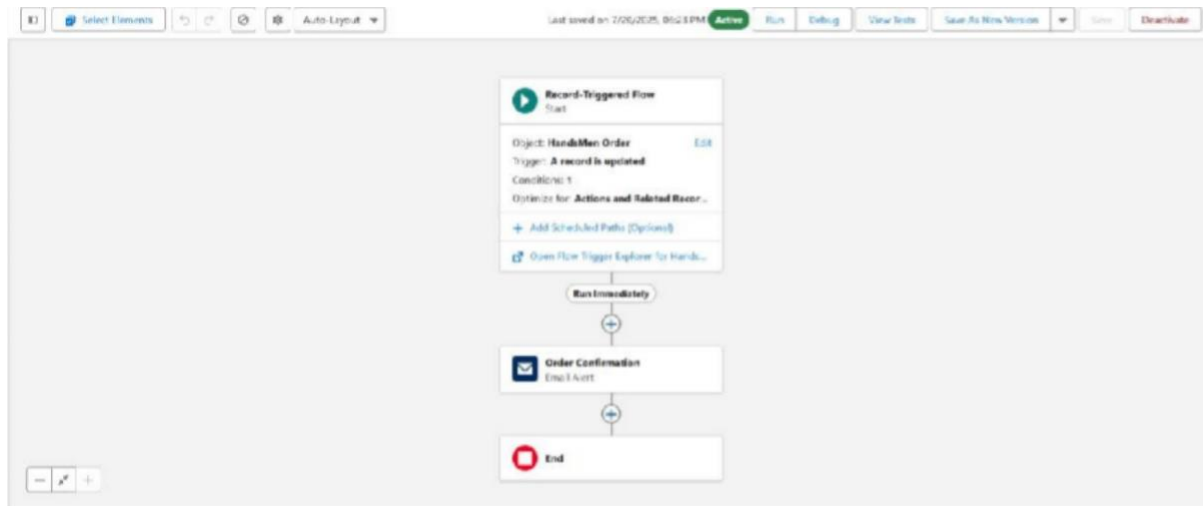
Email Alerts were set up based on these templates and included in respective flows.
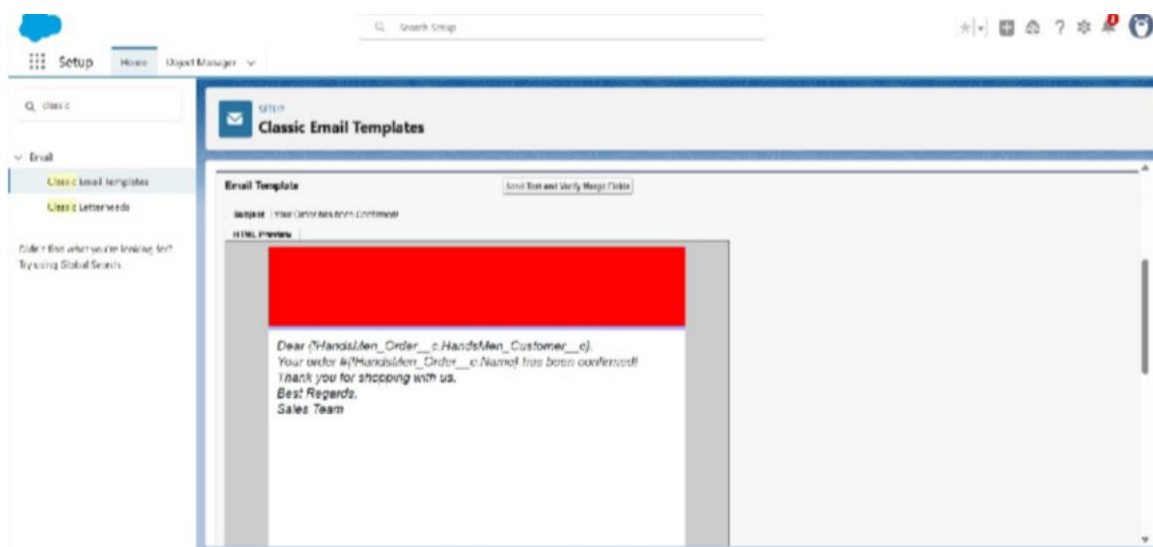
8. Flow Automation

a. Order Confirmation Flow

- Trigger: When order status is updated to Confirmed
- Action: Sends confirmation email to customer

b. Stock Alert Flow

- Trigger: Inventory level decreases below threshold (5 units)
- Action: Triggers a low-stock alert to the Inventory Manager
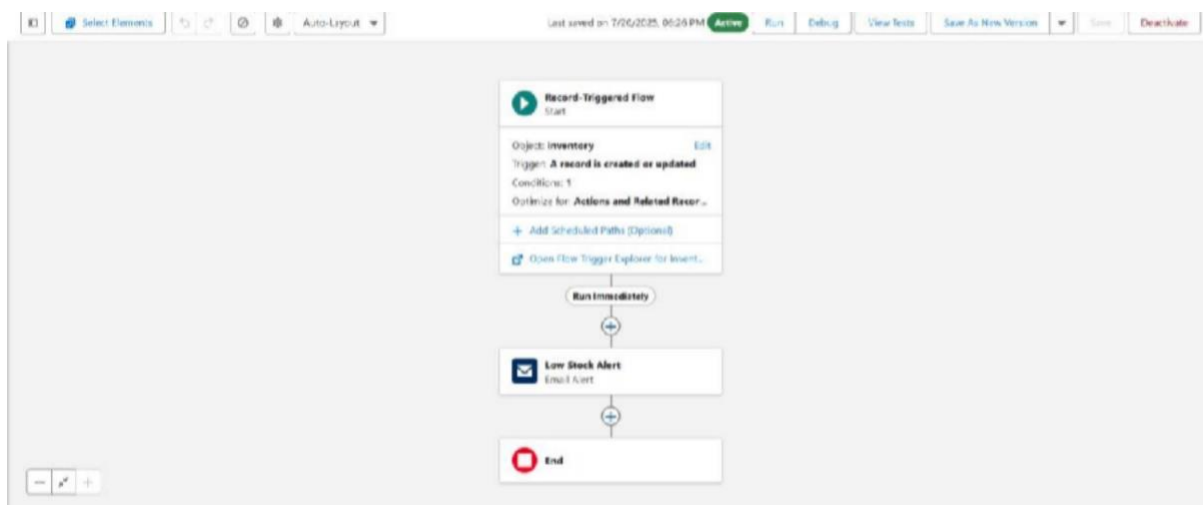
c. Scheduled Loyalty Update Flow

- Schedule: Runs once a day at 12:00 AM
- Function: Checks customer purchase amounts and updates loyalty level accordingly
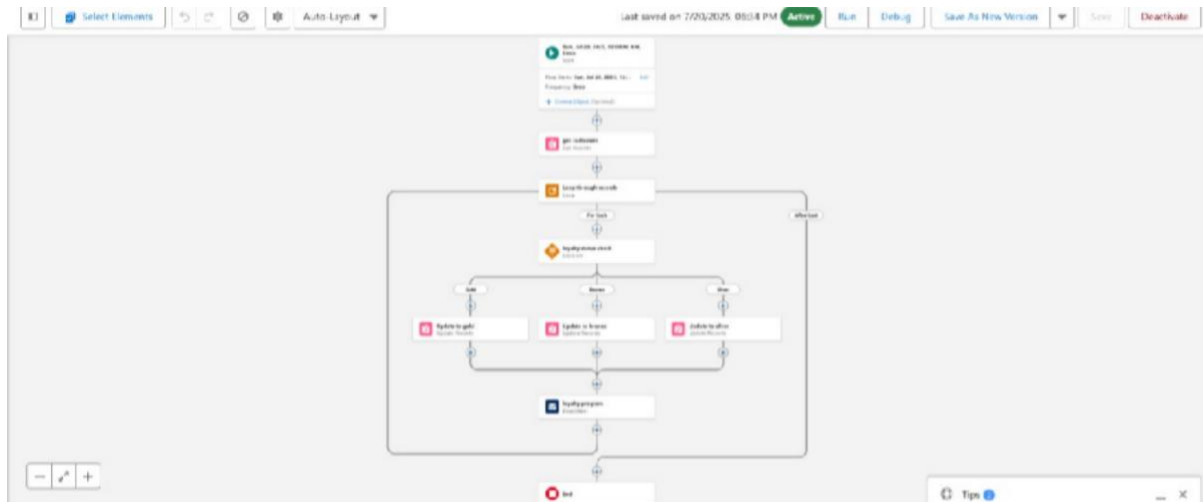
9. Apex Trigger Implementations

- **Order Total Calculation:** Calculates automatically the order total amount by quantity × unit price.
- **Inventory Stock Deduction:** Decrements inventory quantity when an order is executed.
- **Loyalty Tier Evaluation:** Updates a customer's loyalty tier based on total purchase history.

Project Explanation With Real-World Example

To better understand how the Salesforce CRM functions in a real-world scenario, let's walk through the journey of a sample customer named **Elijah Mikaelson** interacting with the HandsMen Threads system.

1. Customer Onboarding
- Elijah visits the HandsMen Threads store or website.
- A new **Customer** record is created in Salesforce with his personal details: name, phone number, and email.
- A **validation rule** ensures that his email is correctly formatted—for example, it must include "@gmail.com" to be accepted.

2. Product Catalog Initialization
- The system administrator adds items such as **shirts** and **jeans** to the Product__c object.
- Each product entry includes pricing, description, and SKU.
- An **Inventory** record is automatically created to track available stock for each product.

3. Order Processing
- Elijah places an order for **2 shirts**, each priced at ₹2500.
- Salesforce automatically generates a new entry in the **Order** object with order details.
- An **Apex Trigger** calculates the total order value:
  Total_Amount__c = 2 × 2500 = ₹5000

4. Inventory Adjustment
- As soon as the order is placed, an **Apex trigger** on the inventory object reduces the shirt quantity by 2 units.
- A **validation rule** prevents inventory from dropping below zero, preserving data integrity.

5. Loyalty Status Evaluation
- Elijah's total purchase value (₹5000) is recorded.
- A trigger reviews his cumulative purchase history and assigns a **loyalty tier** based on predefined thresholds:
  - Up to ₹500 → Bronze
  - ₹500 – ₹1000 → Silver
  - ₹1000 and above → Gold
- With ₹5000 in purchases, Elijah is now recognized as a **Gold** customer.

6. Automated Notifications
- As part of the automated workflow:
  - A **Flow** detects the confirmed order and loyalty tier update.
  - An **Email Alert** is triggered.
- Elijah receives a personalized email:

"Thank you for shopping with us! Your loyalty tier has been upgraded to Gold."

7. Role-Based User Access

To manage the CRM efficiently, users are assigned specific roles:

- **Niklaus Mikaelson**
  - Role: **Sales Manager**
  - Responsibilities: Customer interactions, order entry
  - Profile: Platform 1
- **Kol Mikaelson**
  - Role: **Inventory Manager**
  - Responsibilities: Product and stock management
  - Profile: Platform 1

Conclusion

The Salesforce-based CRM designed for HandsMen Threads has transformed core operational processes, ranging from customer onboarding and product management to order fulfillment, inventory tracking, and loyalty program execution. By utilizing Salesforce's powerful features—such as Custom Objects, Flows, Apex Triggers, Email Alerts, and Validation Rules—the system ensures reliable data management and automated workflows that minimize manual effort.

This solution has not only improved organizational efficiency and response times but also introduced a secure role-based access system to foster collaboration across departments. Its modular and scalable design provides a strong foundation for future expansion. With real-time analytics and smarter customer engagement tools, HandsMen Threads is now well-positioned to deliver a premium, data-driven retail experience while optimizing internal decision-making.

Future Enhancements
To stay aligned with evolving business needs and customer expectations, the following enhancements are recommended:

1. Customer Self-Service Portal
Build a Salesforce-powered community portal to empower customers with direct access to their personal data:
- View and track past orders.
- Monitor loyalty point balances and tier status.
- Submit feedback or raise service requests.

2. Mobile Application for In-Store Use
Develop a mobile solution using Salesforce Mobile SDK to give on-ground employees more agility:
- Manage product inventory in real time.
- Place and track orders on the go.
- Retrieve customer and sales information instantly.

3. Advanced Analytics and Dashboards
Implement dynamic dashboards and visual reporting tools for upper management to:
- Analyze real-time sales metrics and performance trends.
- Monitor inventory levels and turnover rates.
- Make informed decisions with data-driven insights.

4. AI-Powered Personalization
Integrate **Salesforce Einstein AI** to enhance marketing and customer interaction strategies:
- Suggest personalized product recommendations.
- Forecast future sales behavior.
- Segment audiences intelligently for more targeted campaigns.

5. Multi-Channel Communication Integration
Incorporate messaging services like **WhatsApp and SMS** into the CRM to:
- Notify customers of their order status, loyalty updates, and exclusive deals in real-time.
- Increase responsiveness and engagement through instant, omni-channel communication.