

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

INTRODUCTION

HandsMen Threads, a fast-growing brand in the men's fashion industry, is implementing a Salesforce system designed to modernize operations, enhance customer experience, and streamline Shoes management—from order processing to inventory tracking.

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.

OBJECTIVE

The Salesforce implementation focuses on:

- **Creating a robust data model** - to store and relate all business information.
- **Ensuring data quality and integrity** - through UI validations and automation.
- **Building Lightning applications** - for easy navigation and user experience.
- **Automating core business processes** - using Record-Triggered Flows and Apex.

Handling large operations with Asynchronous Apex

The goal is to support the shoes shop line's operations, including ordering, inventory management, customer loyalty, and warehouse coordination.

TECHNOLOGY DESCRIPTION

Salesforce

Salesforce is a cloud-based Customer Relationship Management (CRM) platform that helps business manage customer data, automate process, 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.

Key Objects:

- Product__c - Shoes details: size, color, material, price
- Inventory__c - Stock levels per variant
- Order__c - Customer orders
- Order_Item__c - Each Shoes item within an order
- Customer__c - Loyalty level, history
- Warehouse_Alert__c - Low-stock notifications

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 a specific business purpose.

Profiles

Profiles define what a user can see, do, and edit in Salesforce. It controls object permission, field access, and more.

Roles

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

Permission Sets

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

Validation Rules

Validation Rules ensure data entered meets business criteria.

Example:

- Email must contain @gmail.com

Email Template

Predefined formats for sending emails to customers or users.

Example:

- "Order Confirmation" template

Email Alerts

Email Alerts are actions in Flows Rules that send emails using predefined templates.

Example: When a loyalty level changes, an email is sent to the customer.

Flow

Flows automate business logic without code. They can create, update, or send notifications.

Example:

- Flow triggers email alerts on new order

Apex

Apex is Salesforce object-oriented programming language. It allows developers to write custom logic.

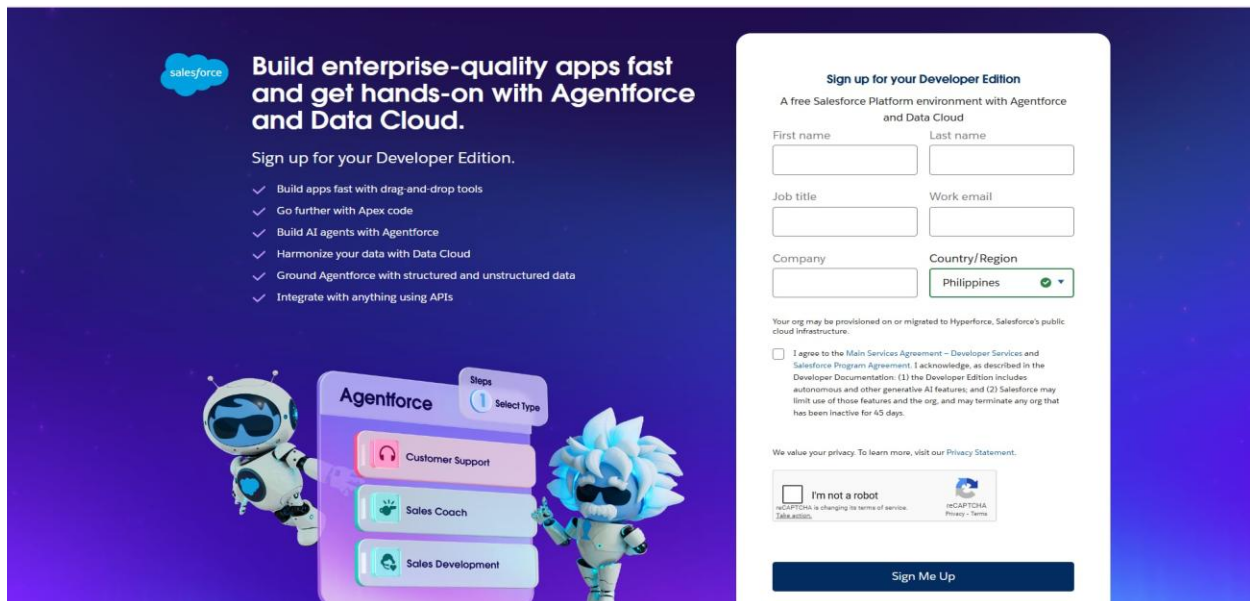
Example Triggers:

- Update Total_Amount_c in orders
- Reduce inventory stock

DETAILED EXECUTION OF PROJECT PHASES

1. Developer Org Setup

- A Salesforce Developer Org was created using <https://developer.salesforce.com/signup>
- The account was verified, password set, and access was granted to the Salesforce Setup page.



2. Custom Object Creation

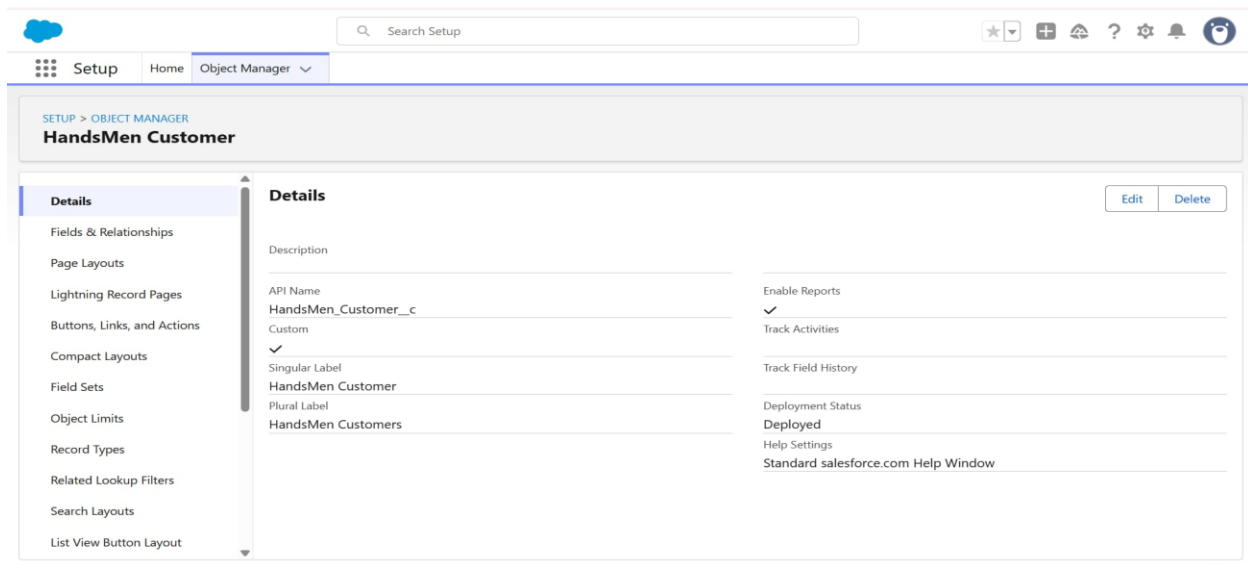
Five custom object were created to store business-critical data

- **HandsMen Customer** - Stores customer info like email, loyalty status.
- **HandsMen Product** - Stores product catalog details like SKU, price, and stock.
- **HandsMen Order** - Stores orders placed by customers, including quantity and status.
- **Inventory** - Tracks stock quantity and warehouse location.
- **Marketing Campaign** - Stores promotional campaigns and scheduling.

Steps followed:

- Navigate to Setup - Object Manager - Create - Custom Object
- Provided label, name and enabled reports/search

- Saved and created Tabs for each object



3. Creating the Lighting App

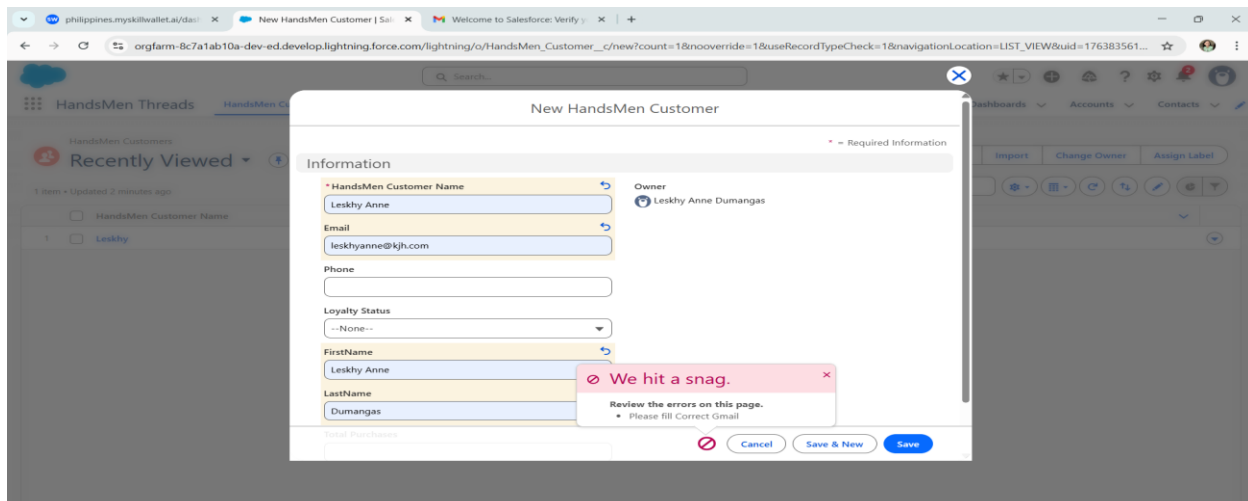
- A custom Lightning App named HandsMen Threads was created.
- Included tabs: HandsMen Customer, Order, Product, Inventory, Campaign, Reports, etc.
- Assigned to the System Administrator profile.

4. Validation Rules

To ensure accurate data entry and enforce business logic, the following validation rules were applied:

- **Customer Object** - Validates email contains @gmail.com

Error: "Please fill Correct Gmail"



5. User Role & Profile Setup

- Cloned the Standard User profile to a new profile named Platform 1 and added access to necessary custom object.
- Created roles for different different department
Sales Manager, Inventory Manager, Marketing Team

6. User Creation

Users were created in salesforce and assigned appropriate roles and profiles to reflect their responsibilities

- Niklaus Mikaelson - Assigned the Sales role
- Kol Mikaelson - Assigned the Inventory role
- These role-based assignments help enforce proper data access and process control within the system.

The screenshot shows the Salesforce Setup interface for editing a user. The left sidebar contains a navigation menu with options like 'Users', 'Permission Set Groups', 'Profiles', and 'User Management Settings'. The main content area is titled 'User Edit' and 'Leskhy Mikaelson'. It includes a 'General Information' section with fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. The 'Role' is set to 'Marketing', 'User License' is 'Salesforce', and 'Profile' is 'Platform 1'. There are also checkboxes for 'Active', 'Marketing User', 'Offline User', 'Knowledge User', 'Flow User', 'Service Cloud User', 'Site.com Contributor User', 'Site.com Publisher User', 'WDC User', and 'Data.com User Type'. A 'Data.com Monthly Addition Limit' is set to 300, and 'Accessibility Mode (Classic Only)' is checked.

7. Email Template & Alerts

Created three email templates

- Order Confirmation - Sent on order status = Confirmed.
- Low Stock Alert - Sent when Inventory <5 units.

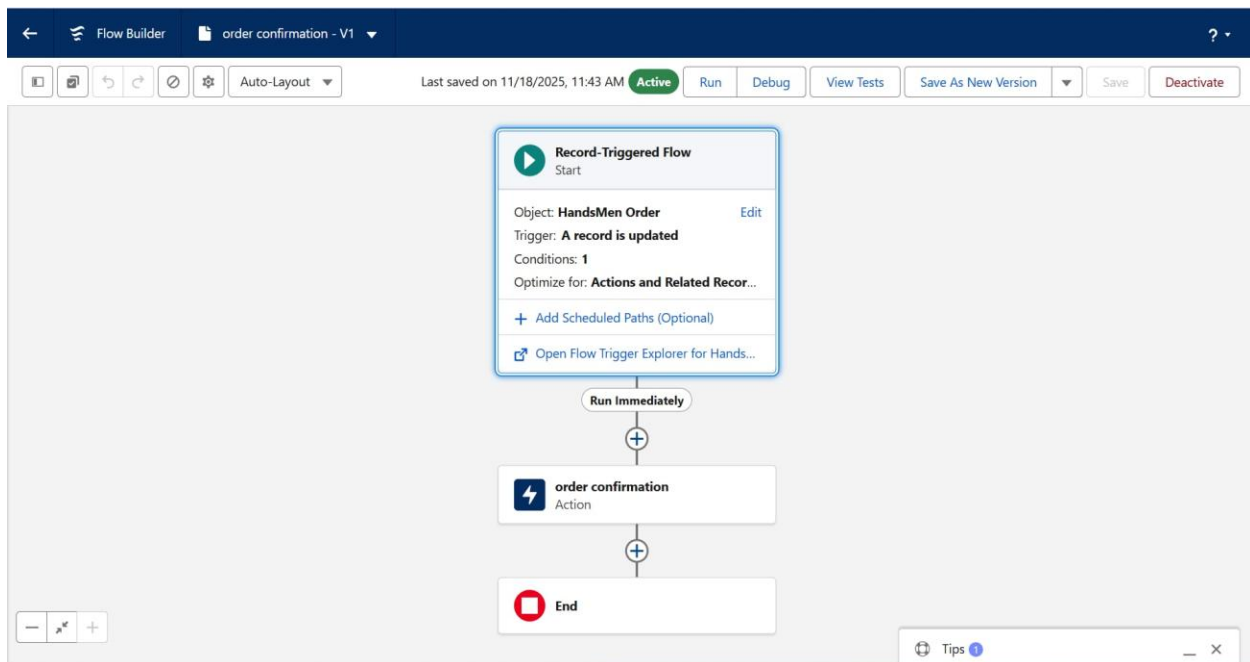
- Loyalty Program Email - Sent when loyalty status changes.

Corresponding Email Alerts were created using these templates and linked to automation flows.

8. Flow Implementations

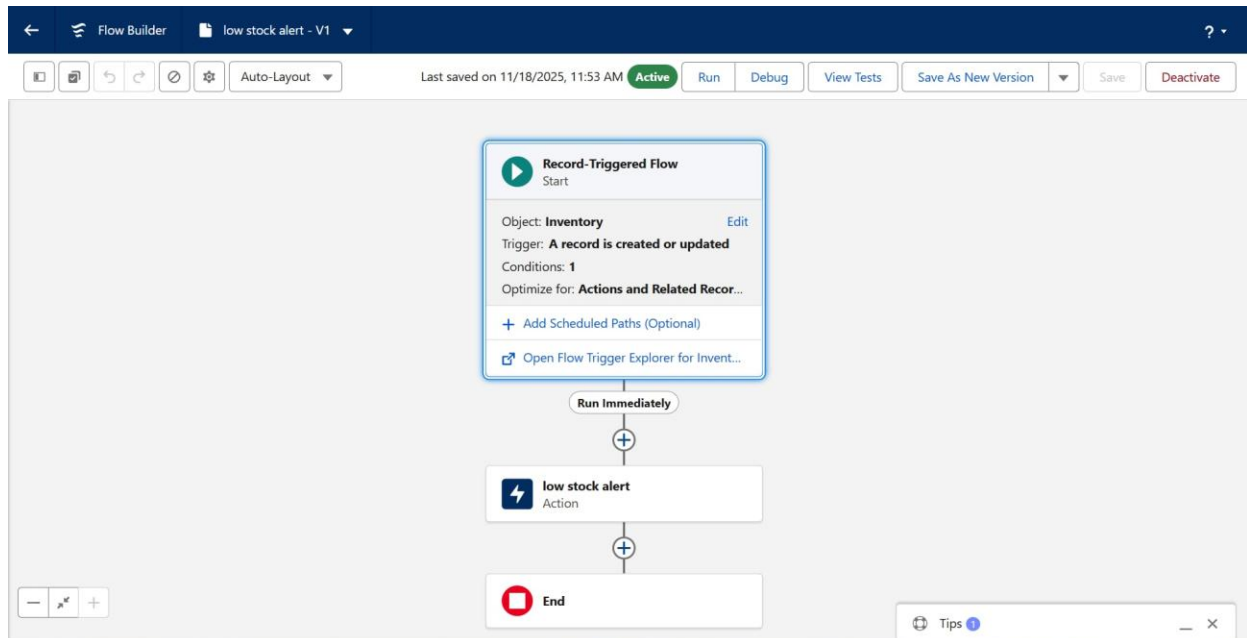
a. Order Confirmation Flow

- Triggered when an order is updated to Confirmed
- Sends an Order Confirmation email to the related customer



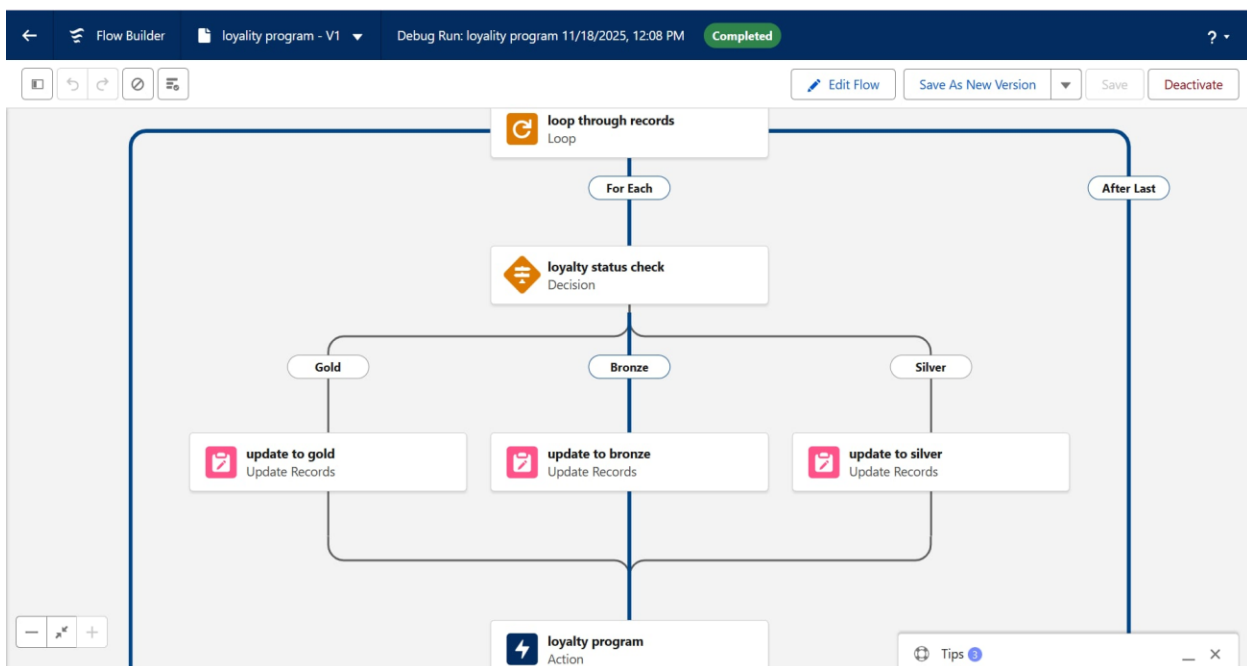
b. Stock Alert Flow

- Triggered when Inventory stock drops below 5.
- Sends Low Stock email to Inventory Manager.



c. Scheduled Flow: Loyalty Update

- Runs daily at midnight.
- Loops through customers and updates their Loyalty Status based on total purchases.



9. Apex Triggers

- **Order Total Trigger** - Auto-calculates Total Amount based on quantity and unit price.
- **Stock Deduction Trigger** - Reduces stock when an order is placed.
- **Loyalty Status Trigger** - Updates Loyalty Status based on total purchases.

PROJECT EXPLANATION WITH REAL-WORLD EXAMPLE

Let's walk through it like a real customer interaction

1. Customer Registration

- A customer, Gabe Pobeda, visits the store or website.
- In Salesforce: A record is created in the Customer object with his name, phone, email,
- Validation Rule: Ensures the email is valid (@gmail.com).

2. Product Setup

- The admin adds products like Shoes 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

- Gabe decides to buy 30 shoes. An order is placed
- In Salesforce: A new Order record is created.
- Apex Trigger: Automatically calculates Total Amount 120.

4. Loyalty Program

- Gabe now has a total purchase of 500
- A trigger on Customer checks his total purchases

5. Email Notifications

- When a new order is placed or loyalty status is updated:
- Close+ Email Alert is triggered
- Gabe 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)

SCREENSHOT

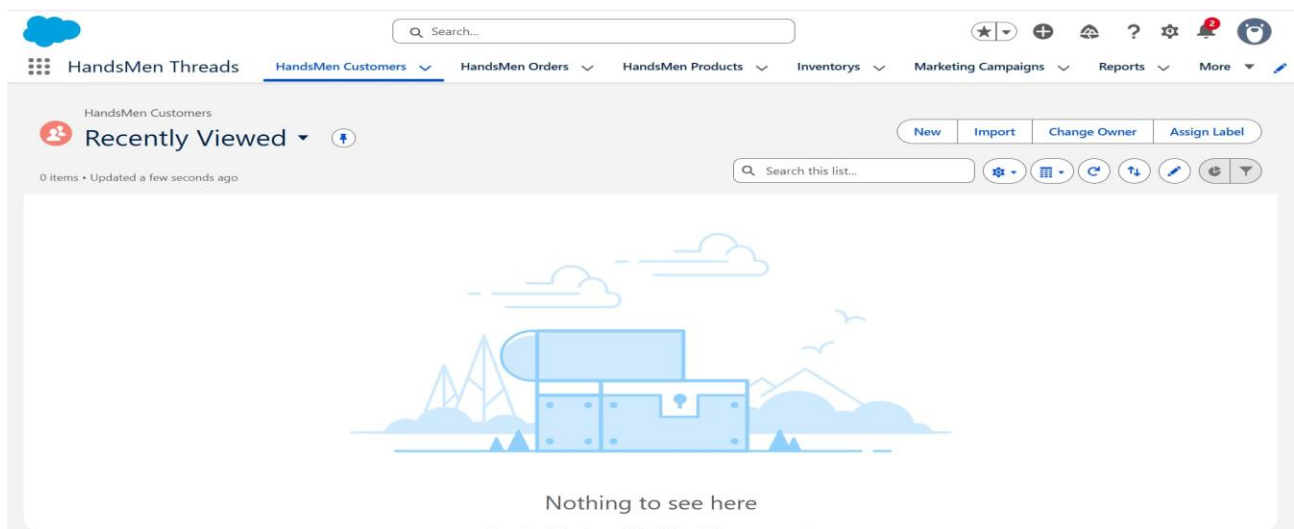


Fig: Custom App for HandsMen Threads

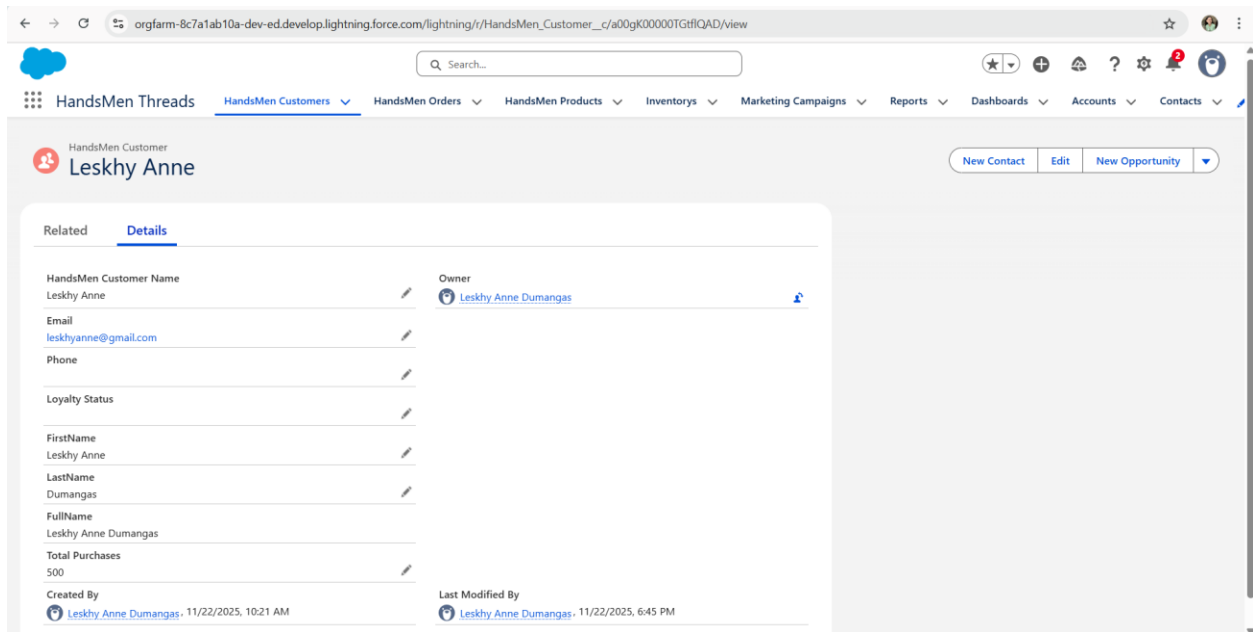


Fig: Customer Creation in HandsMen Threads

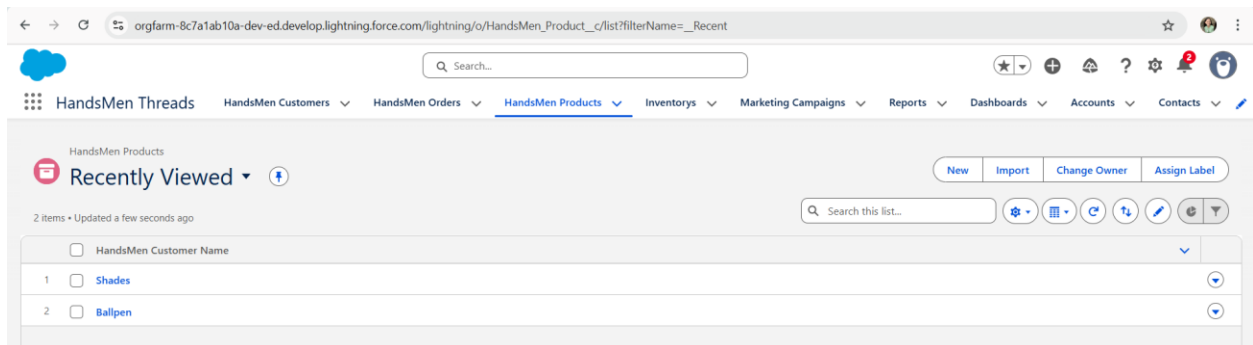


Fig: Products in Hands Men Threads

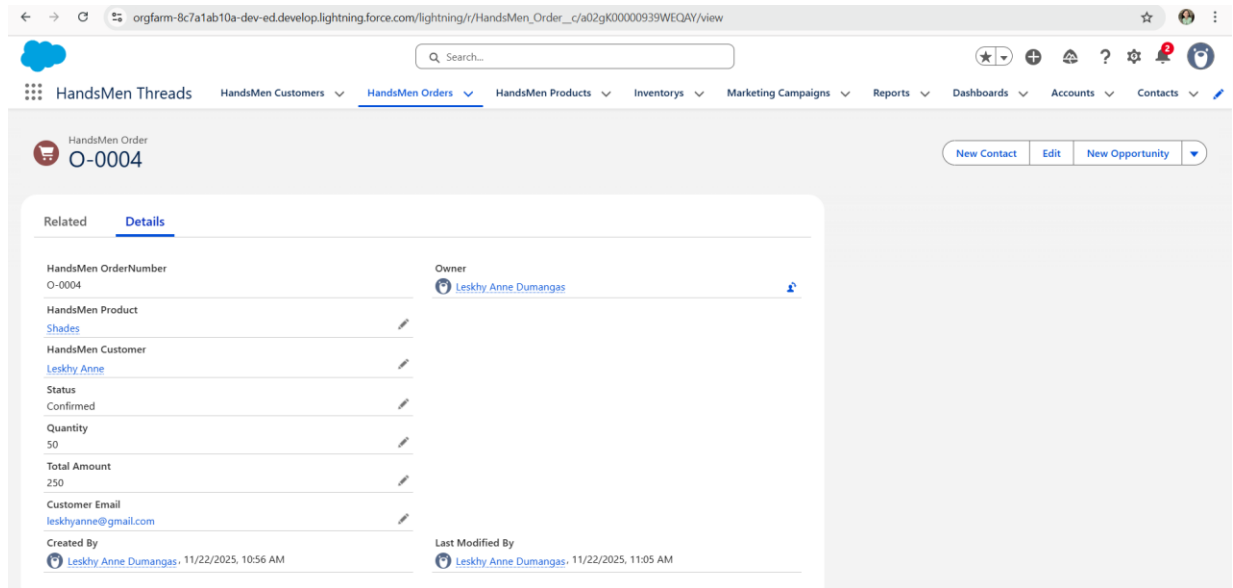


Fig: Order Confirmation

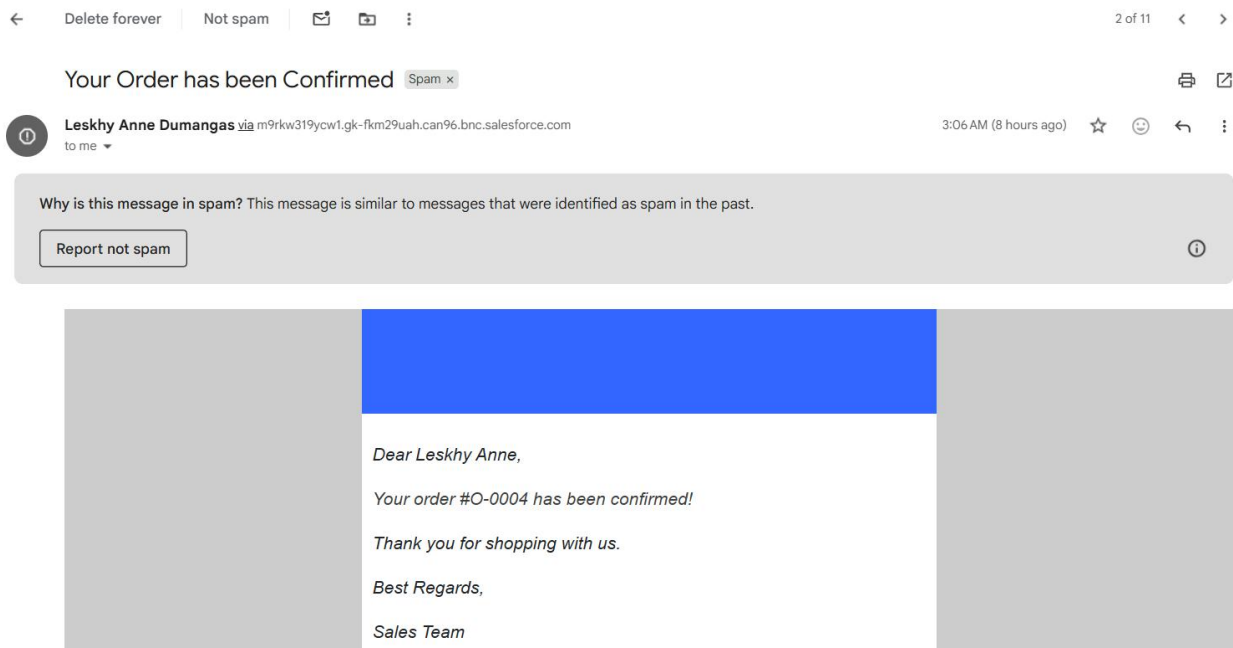


Fig: Order confirmation Email

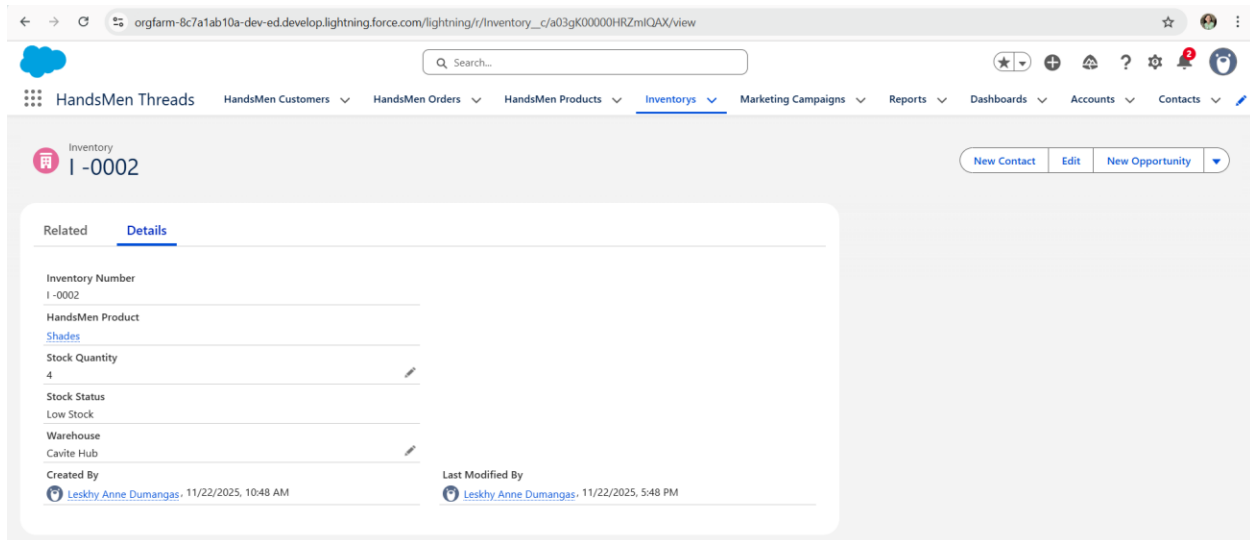


Fig: Inventory Creation

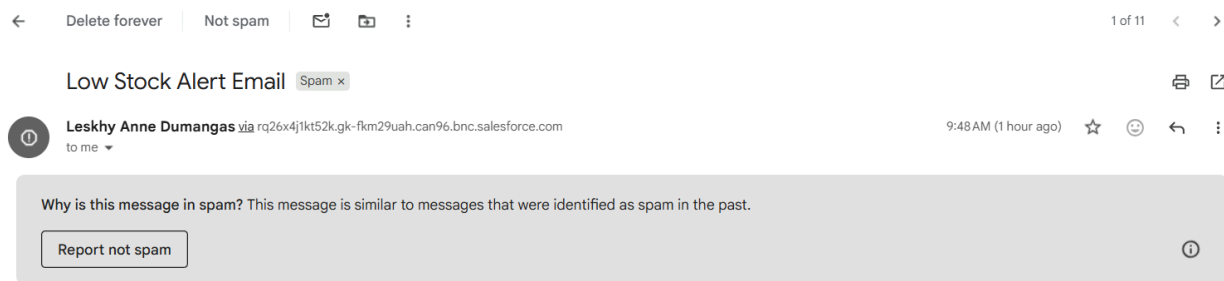


Fig: Low Stock Alert Email

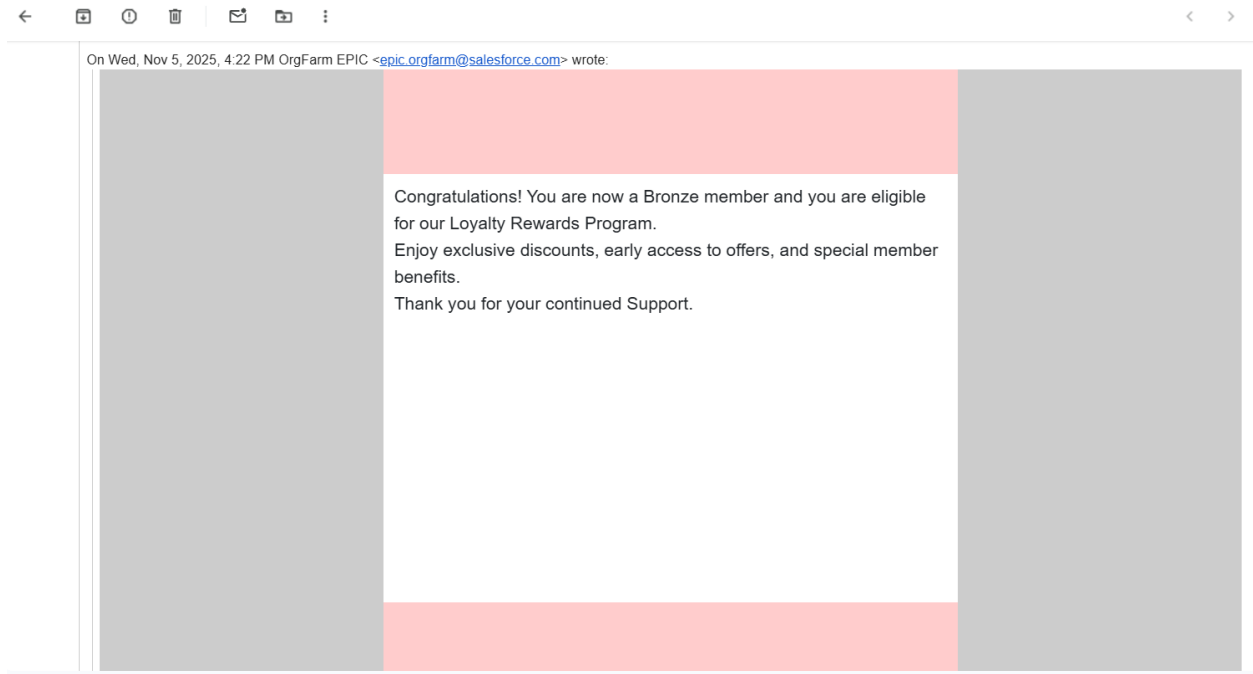


Fig: Loyalty Program Email

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.