

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

ABSTRACT

This project outlines the creation of a custom Salesforce CRM for Hands Men Threads, a high-end men's fashion brand. The main goals were to simplify business tasks, improve how the brand connects with customers, and ensure that all departments use accurate, consistent information.

The system is built around five main categories: Customers, Orders, Products, Inventory, and Marketing Campaigns. To save time and reduce errors, several automated tools were used, including Record-Triggered Flows, Scheduled Flows, and Apex code. These tools automatically handle important tasks such as sending order confirmations, updating loyalty points, and sending alerts when stock is running low.

To keep the system safe and the data clean, the project includes strict validation rules and a security model that limits access based on a user's role in Sales, Inventory, or Marketing. Additionally, an automated Apex batch job was created to regularly check and update items that are low in stock.

In conclusion, this Salesforce implementation provides a better experience for customers through personalized messages and makes the business more efficient through automation. It creates a strong, flexible foundation that will help Hands Men Threads continue to grow in the future.

OBJECTIVE

The primary objective of this project is to develop and implement a customized Salesforce CRM solution for HandsMen Threads. This initiative aims to streamline core business operations, ensure data integrity, and enhance overall customer satisfaction.

By establishing a centralized system for the comprehensive management of customer, order, product, inventory, and marketing campaign data, the project is designed to achieve the following:

- Automate key processes, including order confirmations, loyalty status updates, and stock alerts.
- Ensure accurate and consistent data entry through the application of validation rules.
- Enable real-time visibility into inventory levels and customer interactions.
- Improve internal team coordination via the implementation of 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 a specific business purpose.

Profiles: -

Profiles define what a user can see, do, and edit in Salesforce. It controls object permissions, field 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 data entered meets business criteria. Example:

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

Email Templates: -

Predefined formats for sending emails to customers or users. Example:

- "Order Confirmation" template

Email Alerts: -

Email Alerts are actions in Flows or Workflow Rules that send emails using predefined templates. Example: When a loyalty level changes, an email is sent to the customer.

Flows: -

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

- Flow triggers email alerts on new order

Apex: -

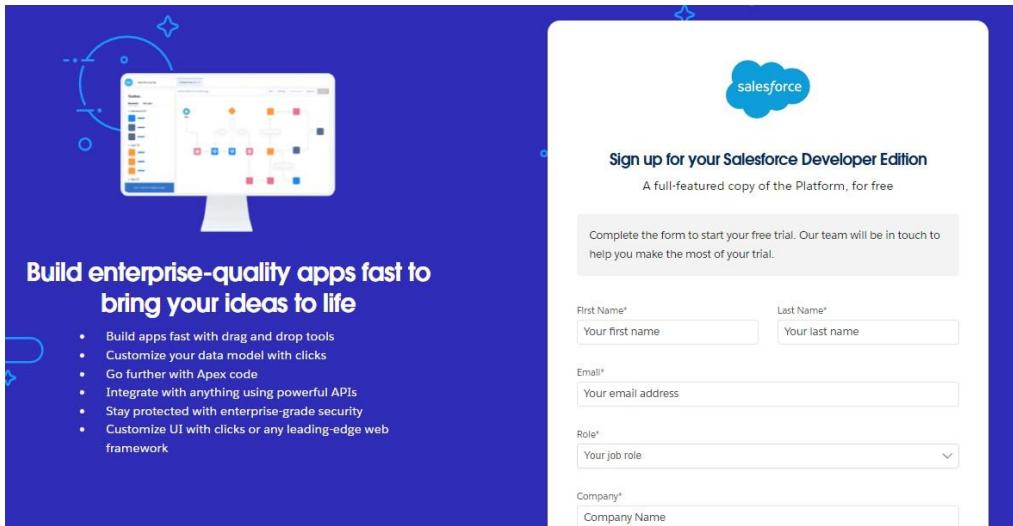
Apex is Salesforce's object-oriented programming language. It allows developers to write custom logic. Example Triggers:

- 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 objects were created to store business-critical data:

- **HandsMen Customer** – Stores customer info like email, phone, 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:

- Navigated to Setup → Object Manager → Create → Custom Object
- Provided label, name, and enabled reports/search
- Saved and created Tabs for each object

SETUP > OBJECT MANAGER
HandsMen Customer

Details

| | |
|-----------------------------|-------------------------------------|
| Fields & Relationships | Description |
| Page Layouts | API Name HandsMen_Customer_c |
| Lightning Record Pages | Custom |
| Buttons, Links, and Actions | Singular Label HandsMen Customer |
| Compact Layouts | Plural Label HandsMen Customers |
| Field Sets | |
| Object Limits | |
| Record Types | |
| Related Lookup Filters | |
| Search Layouts | |
| List View Button Layout | |
| Object Access | |

Details

| | |
|---------------------|-------------------------------------|
| Enable Reports | <input checked="" type="checkbox"/> |
| Track Activities | <input type="checkbox"/> |
| Track Field History | <input type="checkbox"/> |
| Deployment Status | Deployed |
| Help Settings | Standard salesforce.com Help Window |

3. Creating the Lightning 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:

- **Order Object:** Prevents saving if Total_Amount <= 0.

Error: "Please Enter Correct Amount"

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

Error: "Please fill Correct Gmail"

The screenshot shows a Salesforce lightning component titled 'New HandsMen Customer'. The 'Information' section contains fields for 'HandsMen Customer Name' (set to 'james'), 'Email' (set to '@ james'), 'Phone', 'Loyalty Status' (set to '--None--'), 'FirstName', and 'LastName'. The 'Email' field has a red border and a validation message: 'Enter a valid email address, such as name@email.com.' The 'FirstName' field also has a red border and a validation message: '∅ We hit a snag.' A yellow arrow points to the '∅ We hit a snag.' message. At the bottom, there are buttons for 'Cancel', 'Save & New', and 'Save'. A note at the top right indicates '* = Required Information'.

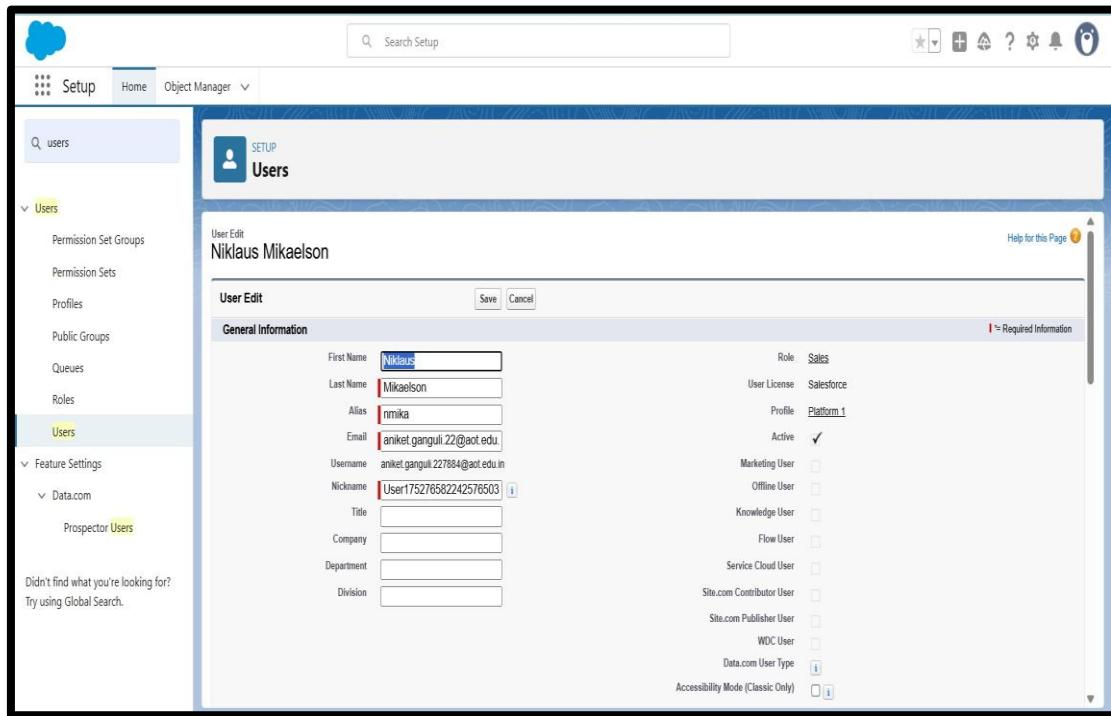
5. User Role & Profile Setup

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

6. User Creation

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

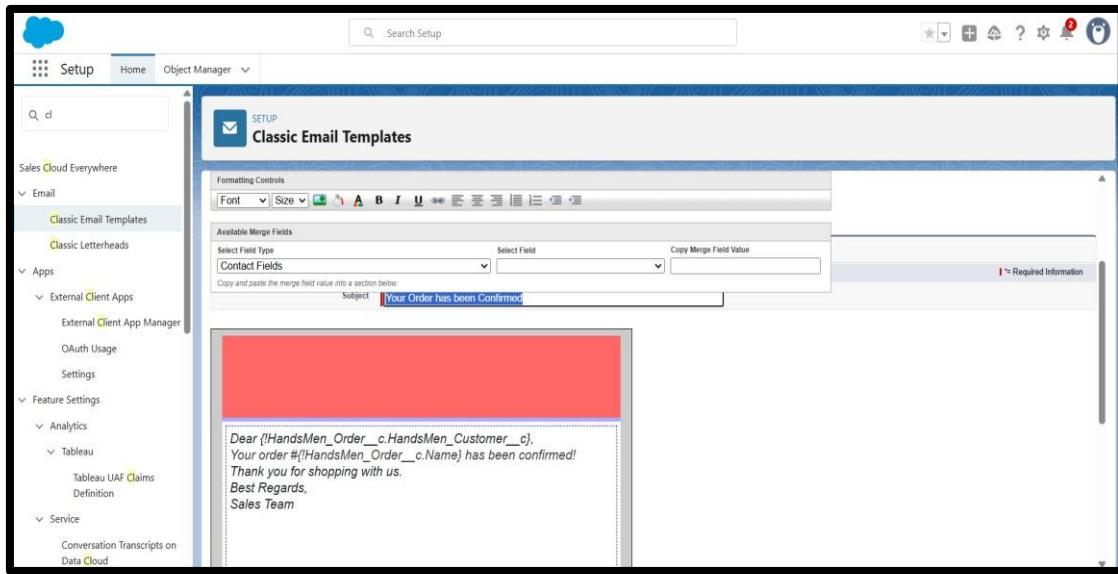
- Niklaus Mikaelson – Assigned the Sales role
- Kol Mikaelson – Assigned the Inventory role
- These role-based assignments help enforce proper data access and process control within the system.



7. Email Template & Alerts

Created three email templates:

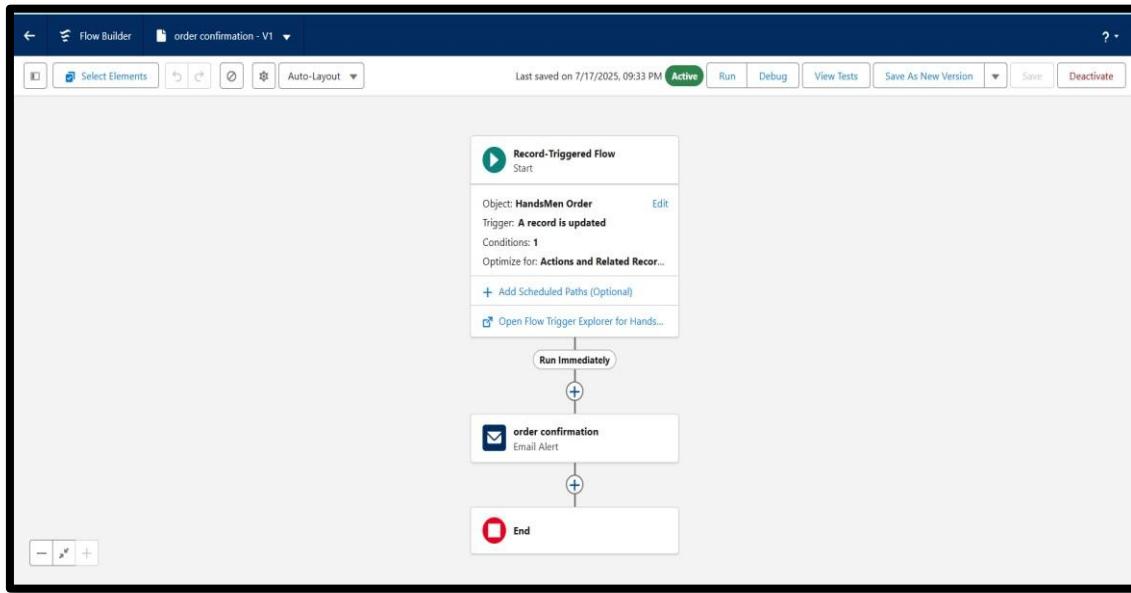
- Order Confirmation – Sent on order status = Confirmed
- Low Stock Alert – Sent when Inventory < 5 units
- Loyalty Program Email – Sent when loyalty status changes Corresponding Email Alerts were created using these templates and linked to automation flows.



8. Flow Implementations

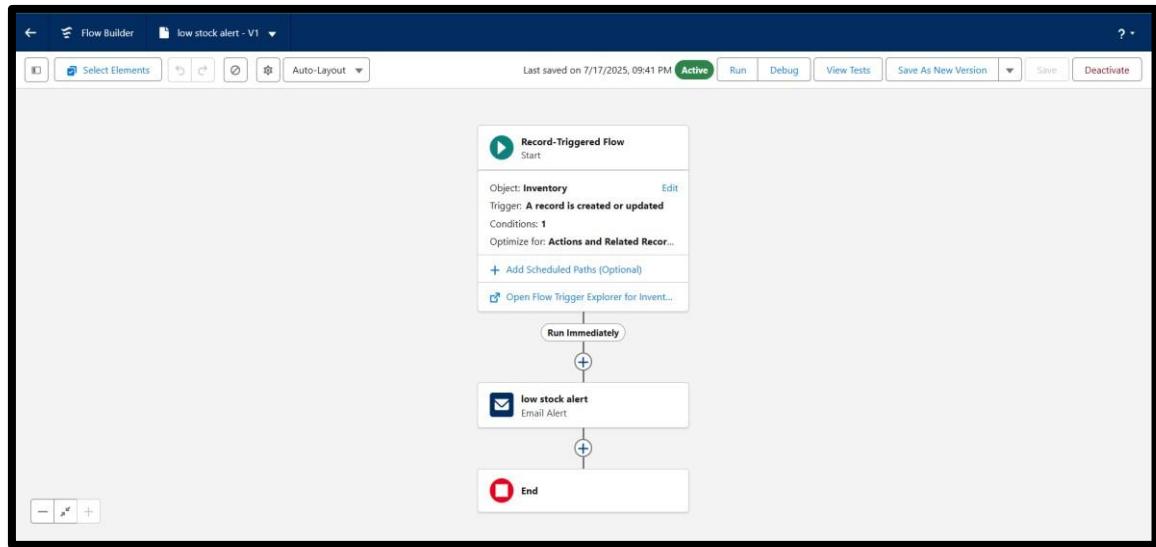
a. Order Confirmation Flow

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



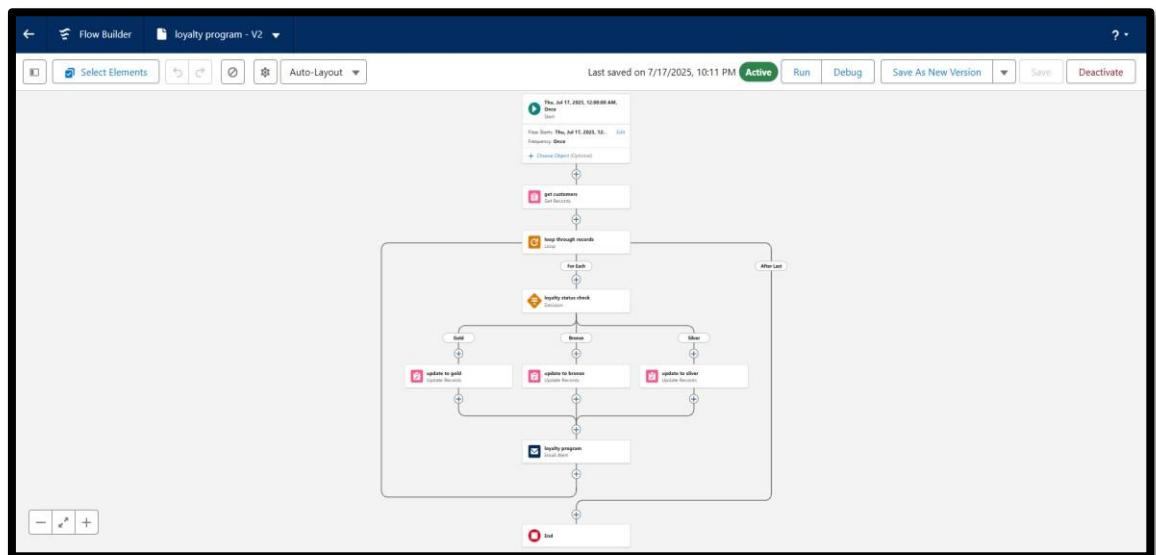
b. Stock Alert Flow

- 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.



7. 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, Elijah Mikaelson, visits the store or website.
- In Salesforce: A record is created in the Customer object with his name, phone, email, etc.
- Validation Rule: Ensures the email is valid (e.g., must contain @gmail.com).

2. Product Setup

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

3. Order Placement

- Elijah decides to buy 2 shirts (each ₹500). An order is placed.
- In Salesforce: A new Order record is created.
- Apex Trigger: Automatically calculates Total_Amount = $2 \times 500 = ₹1000$.

4. Inventory Update

As soon as the order is placed:

- Apex Trigger on Inventory: Reduces shirt stock by 2.
- Validation Rule: Ensures stock never goes below 0.

5. Loyalty Program

- Elijah now has a total purchase of ₹1000.
- A trigger on Customer checks his total purchases. **Based on the value:**
 - < ₹500 → Bronze
 - ₹500—₹1000 → Silver
 - ₹1000 → Gold
- So, Elijah becomes a Silver member.

6. Email Notifications

- 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

A screenshot of a web browser displaying a Salesforce Lightning interface. The URL is https://orgfarm-c792065405-dev-ed.lightning.force.com/lightning/o/HandsMen_Customer__c/list?filterName=RecentlyViewed. The page title is "Recently Viewed | HandsMen C". The navigation bar includes "HandsMen Threads", "HandsMen Customers", "HandsMen Orders", "Inventorys", "HandsMen Products", "Reports", "Dashboards", "Accounts", and "More". The main content area shows a list titled "HandsMen Customers" with a subtitle "Recently Viewed". It displays 3 items updated 23 minutes ago: 1. thor, 2. John Matthew Tagaza, and 3. Clementine. A search bar at the top right says "Search...". Below the list are standard Salesforce edit and delete icons.

A screenshot of a web browser displaying a Salesforce Lightning interface. The URL is https://orgfarm-c792065405-dev-ed.lightning.force.com/lightning/o/HandsMen_Order__c/list?filterName=RecentlyViewed. The page title is "Recently Viewed | HandsMen O". The navigation bar includes "HandsMen Threads", "HandsMen Customers", "HandsMen Orders", "Inventorys", "HandsMen Products", "Reports", "Dashboards", "Accounts", and "More". The main content area shows a list titled "HandsMen Orders" with a subtitle "Recently Viewed". It displays 6 items updated a few seconds ago: 1. O-0006, 2. O-0001, 3. O-0003, 4. O-0004, 5. O-0005, and 6. O-0002. A search bar at the top right says "Search...". Below the list are standard Salesforce edit and delete icons.

The screenshot shows the Salesforce Lightning interface for the 'HandsMen Threads' organization. The top navigation bar includes links for 'HandsMen Customers', 'HandsMen Orders', 'Inventory' (which is currently selected), 'HandsMen Products', 'Reports', 'Dashboards', 'Accounts', and 'More'. A search bar at the top right is labeled 'Search...'. Below the navigation, a section titled 'Recently Viewed' displays three items under the 'Inventory' category, updated a few seconds ago. The items are listed as follows:

| | Inventory Number |
|---|------------------|
| 1 | I -0004 |
| 2 | I -0002 |
| 3 | I -0003 |

On the right side of the list, there are standard Salesforce edit and delete icons. A 'New' button is located at the top right of the list area.

This screenshot shows the 'HandsMen Products' section of the Salesforce Lightning interface. The top navigation bar is identical to the previous screenshot, with 'Inventory' selected. The 'Recently Viewed' list for 'HandsMen Products' displays four items, updated a few seconds ago. The items are listed as follows:

| | HandsMen Product Name |
|---|--------------------------------|
| 1 | Midnight Peak Lapel Tuxedo |
| 2 | Charcoal Cashmere Overcoat |
| 3 | Hand-Burnished Leather Loafers |
| 4 | Italian White Poplin Shirt |

Similar to the inventory view, there are edit and delete icons on the right and a 'New' button at the top right of the list.

philippines.myskillwallet.ai/dashboards

New HandsMen Customer | Salesforce

HandsMen Threads

HandsMen Customers

Recently Viewed

HandsMen Customer Name

1 thor

2 John Matthew Tagaza

3 Clementine

Search

New HandsMen Customer

* = Required Information

Information

* HandsMen Customer Name Owner John Matthew Tagaza

Complete this field.

Email

Phone

Loyalty Status -None--

FirstName

LastName

Total Purchases

Cancel Save & New Save

Marketing Campaigns

New Import Change Owner Assign Label

Sign in

philippines.myskillwallet.ai/dashboards

New HandsMen Order | Salesforce

HandsMen Threads

HandsMen Orders

Recently Viewed

HandsMen Order Name

1 O-0006

2 O-0001

3 O-0003

4 O-0004

5 O-0005

6 O-0002

Search

New HandsMen Order

* = Required Information

Information

HandsMen Order Name Owner John Matthew Tagaza

Customer Search HandsMen Customers...

Status -None--

Quantity

Total Amount

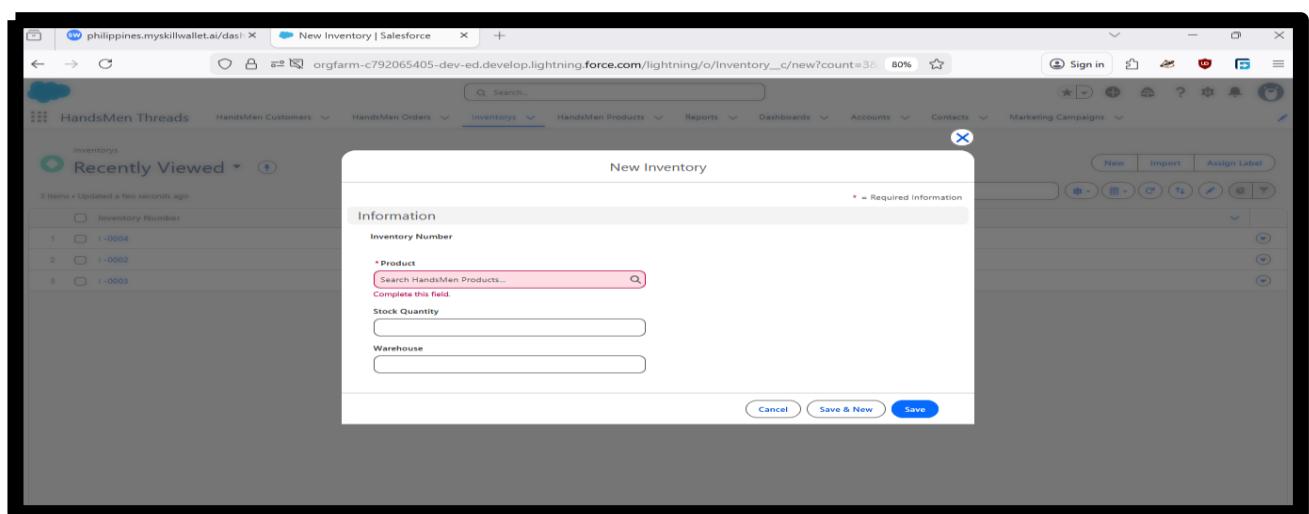
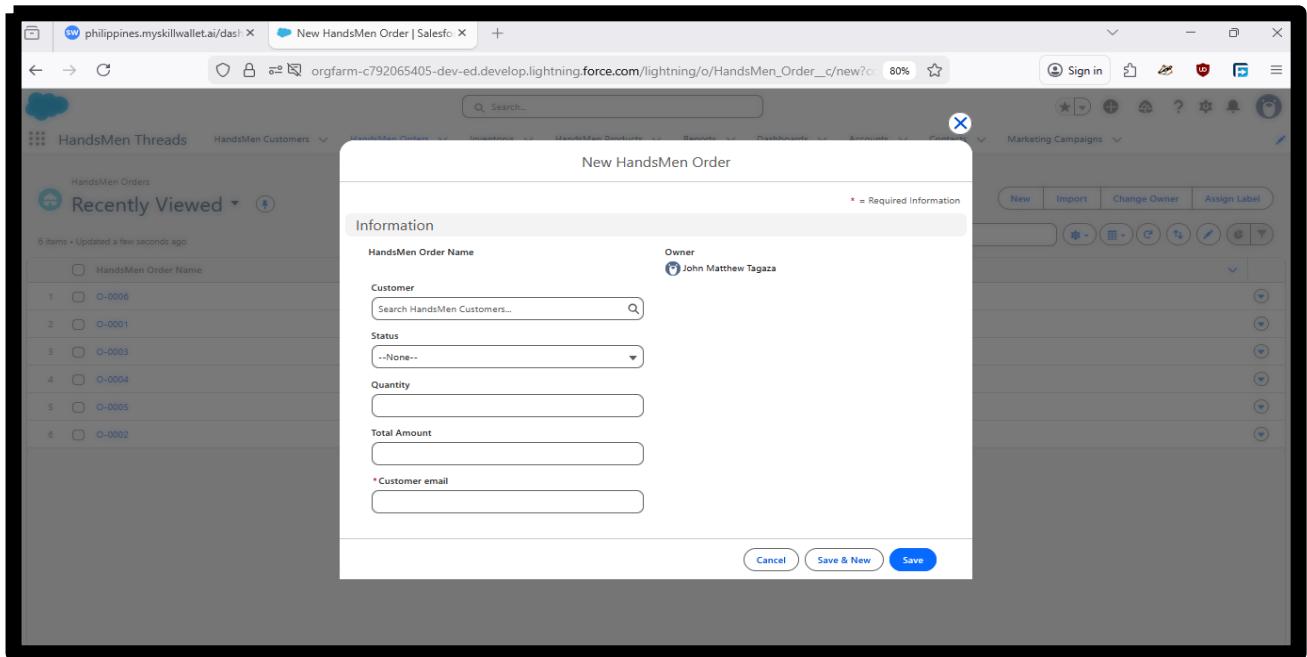
* Customer email

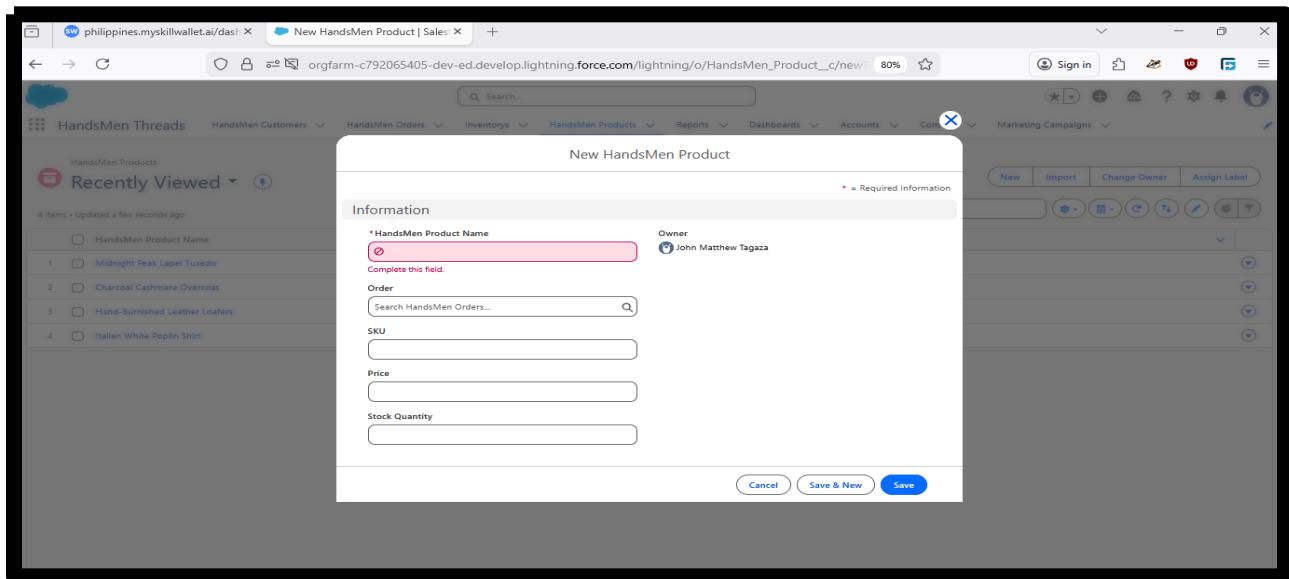
Cancel Save & New Save

Marketing Campaigns

New Import Change Owner Assign Label

Sign in





CONCLUSION

The HandsMen Threads CRM, built on Salesforce, simplifies how the business runs by organizing everything in one place. It handles the heavy lifting for daily tasks like keeping track of customer details, managing the product list, processing orders, and monitoring stock levels. By automating things like loyalty rewards and email updates, the system ensures that the business stays connected with its customers without requiring constant manual work.

Because the platform uses smart tools to check for mistakes, the data stays accurate and up to date in real time. This moves the business away from slow, manual paperwork and helps the team work much faster. It also gives management a clear picture of what is selling and what is currently in the warehouse, making it easier to make quick, informed decisions.

Overall, this system creates a much better experience for both the staff and the customers. It reduces human error and speeds up every part of the sale, from the moment an order is placed to the moment it is shipped. By letting the software handle the routine technical details, the team can focus more on growing the brand and serving their shoppers.

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 & Dashboard

- 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.