

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

Abstract

This project introduces the deployment of a tailored Salesforce CRM solution for HandsMen Threads, a high-end men's fashion and tailoring company. The goal was to simplify business operations, increase customer interaction, and ensure data consistency between departments.

The solution entails creating a solid data model with five main custom objects: Customer, Order, Product, Inventory, and Marketing Campaign. Record-Triggered Flows, Scheduled Flows, Email Alerts, and Apex were utilized to automate business processes for order confirmations, loyalty status, and proactive stock alerts.

To provide clean and accurate data, validation rules were implemented and a security model based on roles was applied to the Sales, Inventory, and Marketing teams. The solution has a scheduled batch job through Apex to update low inventory levels.

This end-to-end CRM deployment enhances customer experience through personalized engagement, optimizes operations via automation, and sets a scalable ground for future business expansion utilizing the Salesforce Platform.

Objective

The main goal of this project is to create and implement a tailored Salesforce CRM solution for HandsMen Threads. This will help simplify business operations, keep data accurate, and improve customer satisfaction.

By building a centralized system to manage customers, orders, products, inventory, and marketing campaigns, the project aims to:

- Automate important processes like order confirmations, loyalty status updates, and stock alerts
- Ensure accurate and consistent data entry with validation rules
- Provide real-time visibility of inventory and customer interactions
- Improve team coordination through role-based access control
- Offer personalized customer experiences with targeted communication and loyalty programs

Technology Description

1. Salesforce Platform

Salesforce is the backbone of the HandsMen Threads application. It provides a strong, scalable, and customizable cloud platform. It manages every part of the bespoke tailoring lifecycle, from client onboarding to order tracking and personalized styling; all of this is centralized in a complete CRM system. The platform offers top-level security, scalability, and integration features that meet the needs of a high-end fashion brand.

2. Custom Objects

Custom Objects are the main business entities unique to HandsMen Threads. They store essential business data beyond standard Salesforce objects. These include ClientProfile_c for detailed customer measurements and style preferences, Order_c for tracking tailoring orders with custom fields for fabric selection and fitting dates, and other specialized objects. Custom objects allow for modeling complex business relationships and storing industry-specific data that standard objects cannot handle.

3. Tabs

Tabs act as navigation points for users to access custom and standard objects within the Salesforce interface. In HandsMen Threads, custom tabs like Clients, Orders, and Styling Tips give tailors and customer service reps direct access to frequently used data. This simplified navigation boosts productivity by reducing clicks, ensuring quick access to essential business information during daily operations.

4. Custom Apps

The HandsMen Threads Custom App combines all relevant objects, tabs, reports, dashboards, and automation tools into one workspace experience. It ensures that tailoring, sales, and support team members work in a cohesive environment that reflects the company's sophistication and branding. Custom apps provide role-specific interfaces that improve user experience and operational efficiency.

5. Profiles

Profiles control access to objects and fields for users, defining what data and functions each user can access. They establish baseline permissions for different user types and form the basis for security. Profiles ensure that sensitive business information is only accessible to authorized personnel, all while keeping operations efficient across departments.

6. Roles

Roles define the organizational structure and determine record access levels based on the company's reporting hierarchy. They control data visibility through role hierarchy. Managers can

access their team's records while keeping data secure. Roles work with sharing rules to provide appropriate data access based on organizational relationships and business needs.

7. Permission Sets

Permission Sets offer flexible access beyond standard Profile limits. They let administrators grant extra permissions to specific users without changing their base Profile. They provide detailed control over features and data access, allowing tailored permission structures. Permission Sets are especially useful for giving temporary access or specialized permissions to users needing extra functionality for specific business processes.

8. Validation Rules

Validation rules ensure data quality and business logic by blocking invalid data entry when creating or modifying records. For example, they prevent order submission if measurements are not verified or ensure that email formats are correct. These rules keep data accurate across the system, reducing manual data cleanup efforts, while ensuring consistent adherence to business processes.

9. Email Templates

Email Templates ensure consistent and professional communication with customers and internal stakeholders through various business processes. HandsMen Threads uses them for welcome emails after client registration, order confirmations, and loyalty program updates. Templates help maintain brand consistency while automating routine communications, saving time and ensuring professional customer interactions.

10. Email Alerts

Email Alerts are automated notifications linked to specific business events and processes. Examples include alerts when order status changes to "Ready for Pickup" or reminder emails sent 24 hours before scheduled fittings. These alerts keep clients engaged and informed without needing manual follow-ups, enhancing customer service efficiency and satisfaction.

11. Flows

Flows automate complex, multi-step business processes within the tailoring lifecycle. They reduce manual work and ensure process consistency. They handle order confirmations, stock alerts, and loyalty status updates through visual workflow automation. Flows offer strong automation capabilities that can execute complex business logic while remaining user-friendly for configuration and maintenance.

12. Apex

Apex code provides custom business logic and advanced functionality where point-and-click tools fall short. Apex enables sophisticated business automation and integration features that enhance Salesforce's native capabilities.

Detailed Execution of Project Phases

Developer Org Setup

- Created a Salesforce Developer Org using <https://www.salesforce.com/form/developer-signup/>
- Verified the account, set password, and gained access to the Salesforce Setup page
- Configured initial organizational settings and security parameters

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First name: G Mohammad ✓ Last name: ARIF ✓


Job title: Developer ✓ Work email: mohammadarif7439 ✓

Company: Salesforce ✓ Country/Region: India ✓

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Custom Object Creation

Five custom objects were created to store business-critical data:

- **HandsMen Customer** – Stores customer information including email, phone, and loyalty status
- **HandsMen Product** – Stores product catalog details like SKU, price, and stock information
- **HandsMen Order** – Stores orders placed by customers, including quantity and total amounts
- **Inventory** – Tracks stock quantity and warehouse location details
- **Marketing Campaign** – Stores promotional campaign information and scheduling data

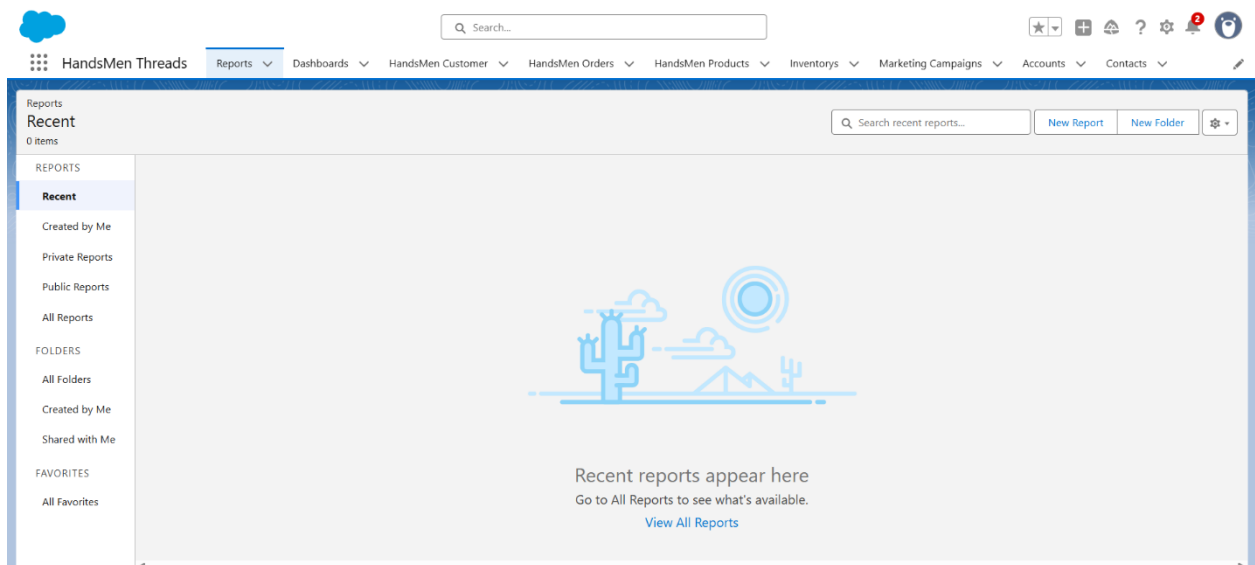
<div> <div>  <div> <div>SETUP</div> <div>Object Manager</div> <div>3 Items. Sorted by Label</div> </div> </div> <div> <input type="text" value="HandsMen"/> <input type="button" value="Schema Builder"/> <input type="button" value="Create"/> </div> </div>					
LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
HandsMen Customer	HandsMen_Customer__c	Custom Object		7/20/2025	✓
HandsMen Order	HandsMen_Order__c	Custom Object		7/20/2025	✓
HandsMen Product	HandsMen_Product__c	Custom Object		7/20/2025	✓

Steps followed:

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

Creating the Lightning App

- Created a custom Lightning app named "HandsMen Threads"
- Included tabs: HandsMen Customer, Order, Product, Inventory, Campaign, Reports
- Assigned to the System Administrator Profile for initial setup and testing



Validation Rules

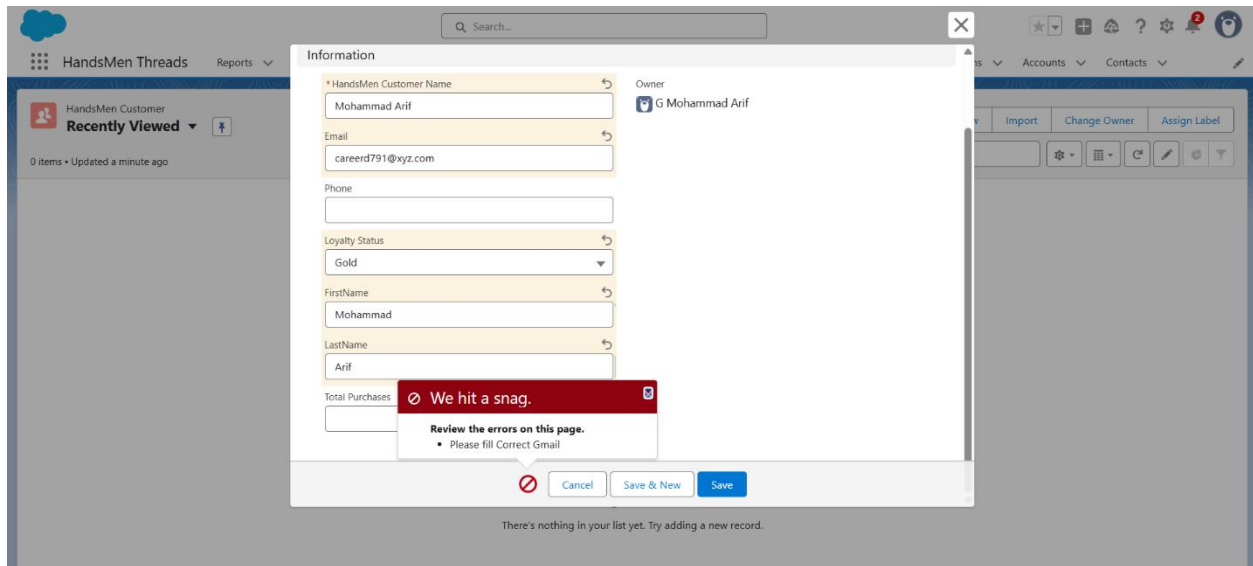
To ensure accurate data and enforce business logic, the following validation rules were implemented:

- **Order Object:** Prevents saving if Total_Amount__c <= 0

- Error Message: "Please enter correct amount"
- **Customer Object:** Validates email contains @gmail.com
 - Error Message: "Please fill correct gmail"

User Role & Profile Setup

- Cloned the Standard User profile to create "Platform 1" profile



- Added access to necessary custom objects and fields
- Created departmental roles:
 - Sales Manager
 - Inventory Manager
 - Marketing Team

User Creation

Created users in Salesforce with appropriate role and profile assignments:

- Assigned users to specific departments based on their responsibilities

- Configured user permissions and access levels according to business requirements

SETUP Users

User Edit: Niklaus Mikaelson

User Edit [Save] [Save & New] [Cancel]

General Information ⓘ Required Information

First Name: Niklaus
 Last Name: Mikaelson
 Alias: nmika
 Email: mohammadarif7439@gmail
 Username: iuhfundhvjhf@gmail.com
 Nickname: User175325897714489150 ⓘ
 Title:
 Company:
 Department:
 Division:

Role: Sales
 User License: Salesforce
 Profile: Platform 1 ⓘ
 Active: ☒
 Marketing User: ☐
 Offline User: ☐
 Knowledge User: ☐
 Flow User: ☐
 Service Cloud User: ☐
 Site.com Contributor User: ☐
 Site.com Publisher User: ☐
 WDC User: ☐
 Data.com User Type: --None-- ⓘ
 Data.com Monthly Addition Limit: 300

Email Template & Alerts

Created three comprehensive email templates:

- **Order Confirmation** – Sent when 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.

SETUP Classic Email Templates

Order_Confirmation_Email

Preview your email template below.

Email Template Detail [Edit Properties] [Edit HTML Version] [Edit Text Version] [Delete] [Clone]

Email Templates from Salesforce: Unfiled Public Classic Email Templates

Email Template Name: Order_Confirmation_Email Available For Use: ☒
 Template Unique Name: Order_Confirmation_Email Last Used Date:
 Classic Letterhead: HandsMan Threads Times Used:
 Email Layout: Free Form Letter
 Encoding: Unicode (UTF-8)
 Author: G Mohammad Arif [Change]
 Description:
 Created By: G Mohammad Arif, 7/23/2025, 1:43 AM Modified By: G Mohammad Arif, 7/23/2025, 1:43 AM

[Edit Properties] [Edit HTML Version] [Edit Text Version] [Delete] [Clone]

Email Template [Send Test and Verify Merge Fields]

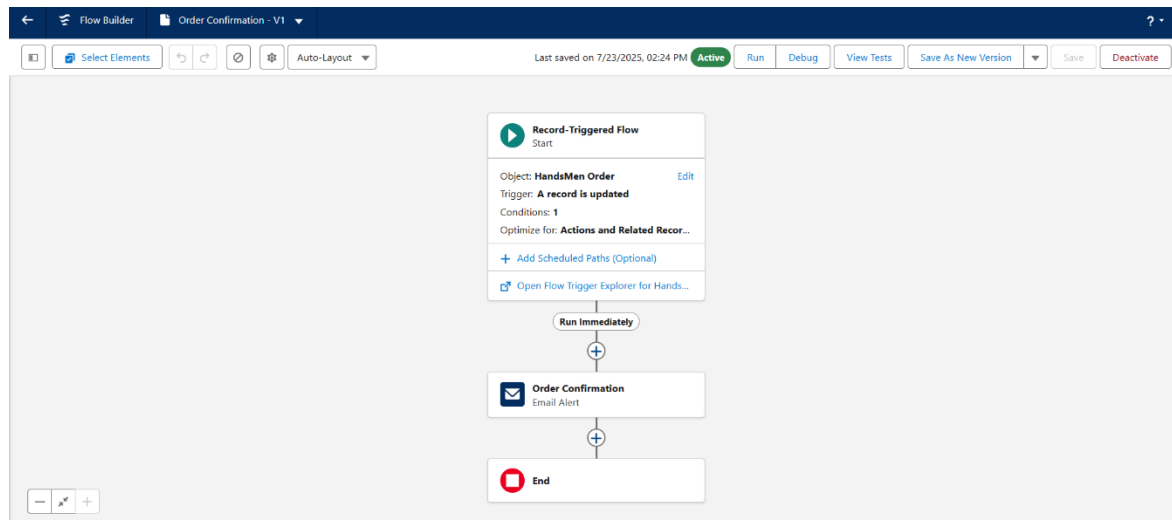
Subject Your Order has been Confirmed

HTML Preview

Flow Implementation

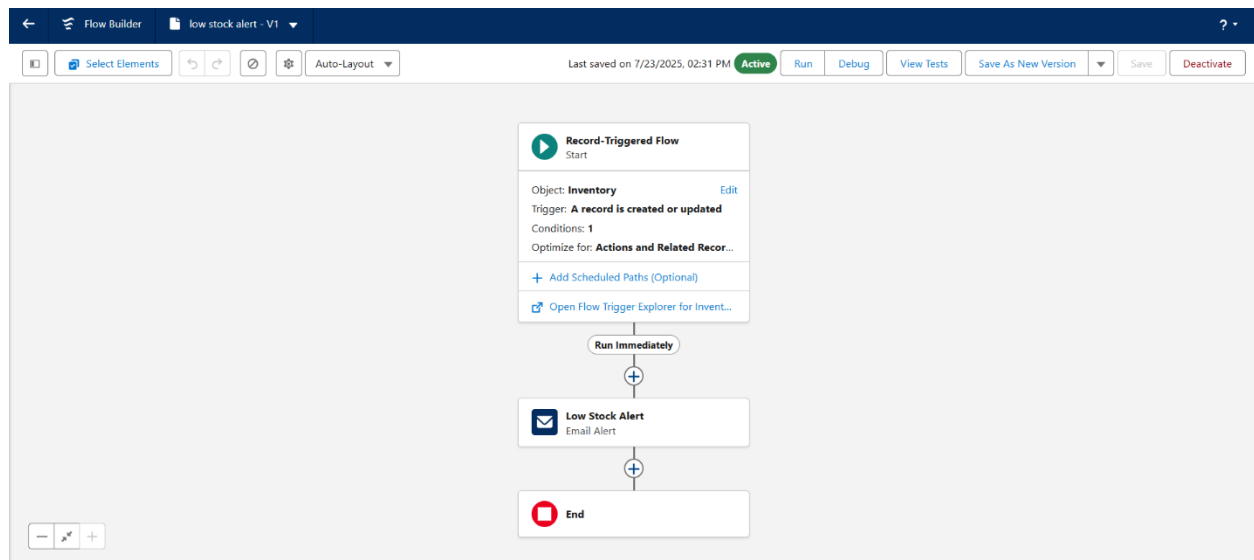
Order Confirmation Flow

- Triggered when an order status is updated to "Confirmed"
- Automatically sends order confirmation email to the related customer
- Updates internal tracking systems for order processing



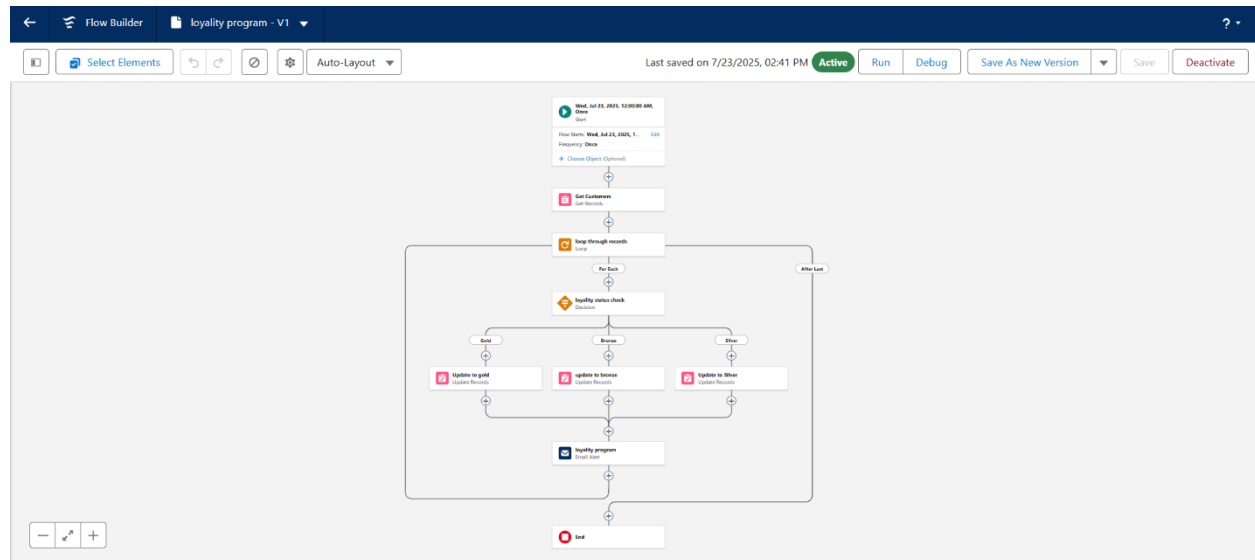
Low Stock Alert Flow

- Triggered when inventory stock drops below 5 units
- Sends low stock email alerts to Inventory Manager
- Initiates procurement processes for inventory replenishment



Scheduled Flow: Loyalty Program

- Runs daily at midnight for systematic processing
- Loops through all customers and updates loyalty status based on total purchases
- Maintains accurate loyalty program membership across the customer base



Apex Triggers

- **Order Total Trigger:** Auto-calculates total amount based on quantity and unit price
- **Stock Deduction Trigger:** Reduces inventory stock when orders are placed
- **Loyalty Status Trigger:** Updates customer loyalty status based on total purchase amounts

Project Explanation with Real-World Example

Customer Registration Process

A customer, Elijah Mikaelson, visits the store or website to explore premium men's fashion options. In Salesforce, a comprehensive record is created in the Customer object containing his name, phone number, email address, and initial preferences. The validation rule automatically ensures the email format is valid, requiring @gmail.com domain for consistency and communication reliability.

Product Setup and Catalog Management

The system administrator adds premium products like designer shirts, tailored jeans, and accessories into the Product_c object. Each product contains detailed information including pricing, fabric details, sizing options, and style characteristics. Corresponding inventory records

are created to manage stock levels, warehouse locations, and replenishment schedules for these high-end fashion items.

Order Placement and Processing

Elijah decides to purchase 2 premium shirts, each priced at ₹2,500, creating a significant transaction. A new Order record is automatically created in Salesforce, capturing all transaction details. The Apex Trigger immediately calculates the `Total_Amount_c` as $2 \times ₹2,500 = ₹5,000$, ensuring accurate financial tracking and eliminating manual calculation errors.

Inventory Management and Updates

As soon as Elijah's order is confirmed, the system automatically processes inventory changes. The Apex trigger on Inventory reduces the shirt stock by 2 units, maintaining real-time inventory accuracy. The validation rule ensures stock levels never go below zero, preventing overselling and maintaining inventory integrity across all channels.

Loyalty Program Management

With Elijah's total purchase now at ₹5,000, the system automatically evaluates his loyalty status using predefined criteria:

- **Bronze Level:** < ₹2,500 in total purchases
- **Silver Level:** ₹2,500 - ₹10,000 in total purchases
- **Gold Level:** > ₹10,000 in total purchases

Based on his ₹5,000 purchase total, Elijah automatically qualifies for Silver membership status with associated benefits and privileges.

Automated Email Communications

When the order is placed and loyalty status is updated, the integrated Flow and Email Alert system automatically triggers personalized communications. Elijah receives a professional email stating: "Thank you for your purchase! Your order has been confirmed and your loyalty status is now Silver, unlocking exclusive benefits and early access to new collections."

User Management and Role-Based Access

The system supports multiple users with appropriate access levels:

- **Niklaus Mikaelson** - Sales Role with Platform 1 Profile (customer interaction and order management)
- **Kol Mikaelson** - Inventory Role with Platform 1 Profile (stock management and procurement)

Each user has tailored access to relevant data and functionality based on their departmental responsibilities.

Screenshots

The screenshot shows the 'HandsMen Customer' details for 'Mohammad Arif'. The interface includes a navigation bar with the following items: HandsMen Threads, Reports, Dashboards, HandsMen Customer, HandsMen Orders, HandsMen Products, Inventories, Marketing Campaigns, Accounts, and Contacts. A search bar is located at the top right. The 'Details' tab is active, showing the following information:

Related	Details
HandsMen Customer Name	Mohammad Arif
Email	career791@gmail.com
Phone	
Loyalty Status	Gold
FirstName	Mohammad
LastName	Arif
FullName	Mohammad Arif
Total Purchases	
Created By	G Mohammad Arif, 7/27/2025, 4:16 AM
Last Modified By	G Mohammad Arif, 7/27/2025, 4:16 AM

Fig: Customer Creation in HandsMen Threads

The screenshot shows the 'HandsMen Customer' 'Recently Viewed' list. The interface includes a navigation bar with the following items: HandsMen Threads, Reports, Dashboards, HandsMen Customer, HandsMen Orders, HandsMen Products, Inventories, Marketing Campaigns, Accounts, and Contacts. A search bar is located at the top right. The 'Recently Viewed' list displays the following information:

HandsMen Customer Name
1 Mohammad Arif
2 Stefan Salvatore

Fig: Customers in HandsMen Threads

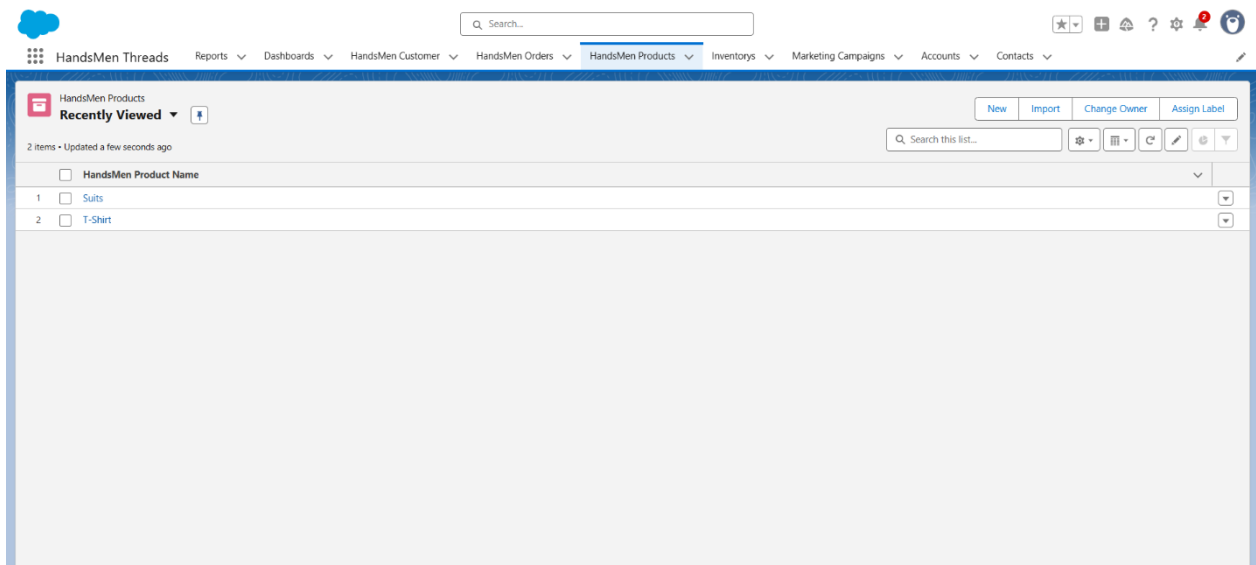


Fig: Products in HandsMen Thread

New Inventory

* = Required Information

Information

Inventory Name

* Product ↶
 ✕

Stock Quantity ↶

Warehouse

CancelSave & NewSave

Fig: Inventory Creation


New HandsMen Order

* = Required Information

Information

HandsMen Order Name

Owner

 G Mohammad Arif

HandsMen Product



Suits

HandsMen Customer



Mohammad Arif

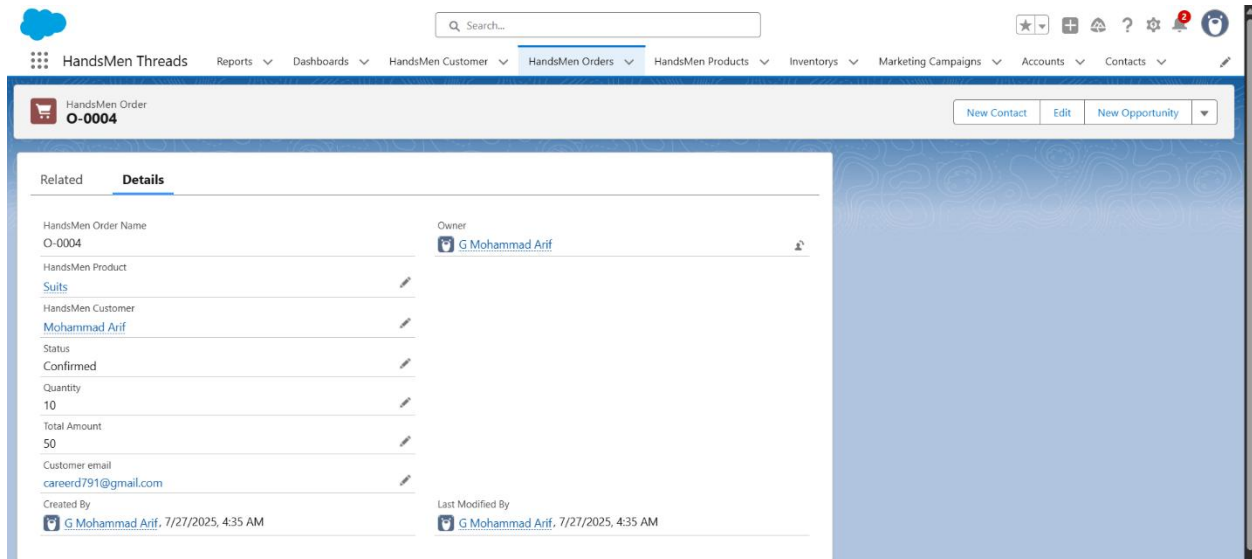
Status

Confirmed

Quantity

10

Fig: HandsMen Order Creation



The screenshot displays the 'HandsMen Threads' application interface. The top navigation bar includes a search bar and various menu items: Reports, Dashboards, HandsMen Customer, HandsMen Orders (selected), HandsMen Products, Inventories, Marketing Campaigns, Accounts, and Contacts. The main header shows the order ID 'O-0004' and buttons for 'New Contact', 'Edit', and 'New Opportunity'. The 'Details' tab is active, showing the following information:

Field	Value	Action
HandsMen Order Name	O-0004	
Owner	G Mohammad Arif	
HandsMen Product	Suits	Edit
HandsMen Customer	Mohammad Arif	Edit
Status	Confirmed	Edit
Quantity	10	Edit
Total Amount	50	Edit
Customer email	careerd791@gmail.com	Edit
Created By	G Mohammad Arif, 7/27/2025, 4:35 AM	
Last Modified By	G Mohammad Arif, 7/27/2025, 4:35 AM	

Fig: Order Confirmation



Fig: Low Stock Alert Email

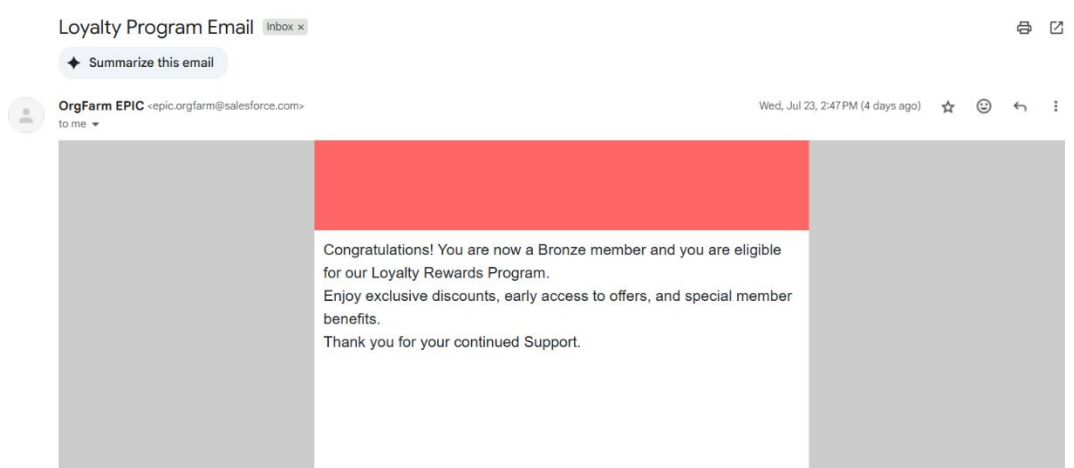


Fig: Loyalty Program Email

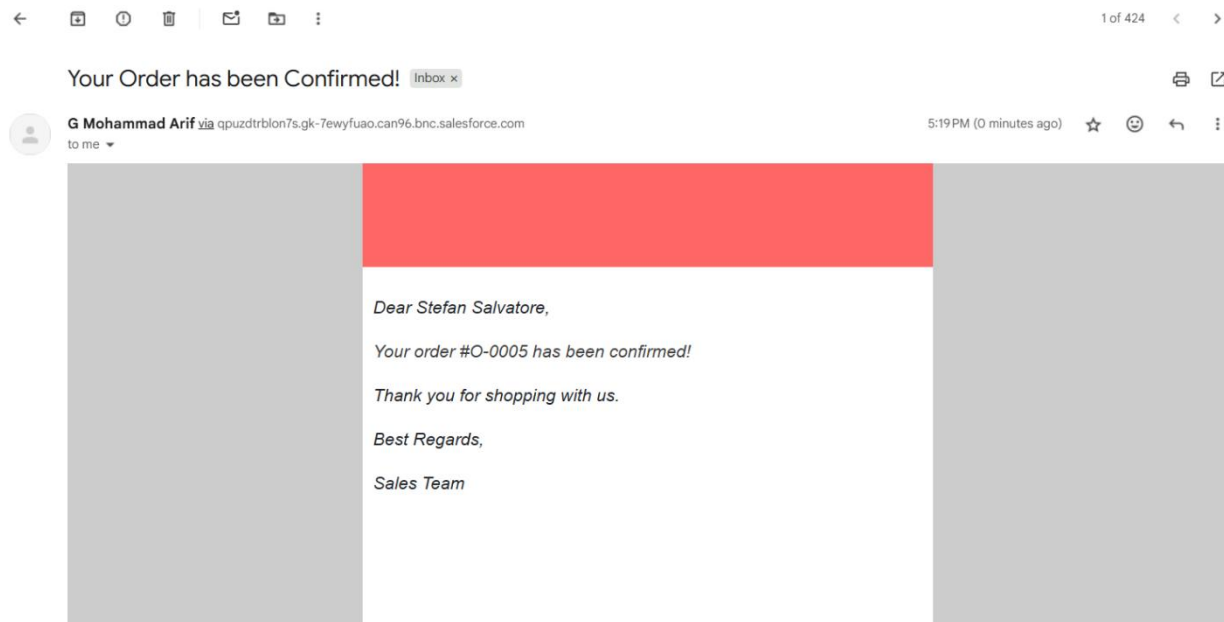


Fig: Order Confirmation Email

Conclusion

The HandsMen Threads CRM application based on Salesforce effectively automates key business processes such as customer administration, product cataloging, order handling, inventory management, and loyalty program processing. Using powerful Salesforce features such as Custom Objects, Flows, Validation Rules, Email Alerts, and Apex development, the application provides proper data entry, real-time business updates, and improved delivery of customer experience.

With thorough automation and soundly designed user role management, the platform substantially reduces human errors, speeds up business processes, and offers insightful information about sales performance and inventory management. The solution shows how current CRM technology can enhance a high-end fashion brand's operational efficiency while preserving the high-end customer experience luxury retail demands.

Future Scope

1. Detailed Reports & Dashboards

Create detailed sales analytics, inventory management dashboards, and insights into customer behavior. interface. This will help management monitor business trends, performance metrics, and growth opportunities in real-time with interactive visualizations.

2. Mobile App Development using Salesforce Mobile SDK

Allow store staff to manage inventory, process orders, and access customer information while on the go using a mobile. This will improve field operations and provide flexibility for trunk shows and off-site customer consultations.

3. AI-Powered Recommendations (Einstein)

Use Salesforce Einstein AI to offer personalized product recommendations based on each customer's purchase history, style preferences, and seasonal trends. This will improve the personal shopping experience and boost sales conversion rates.

4. WhatsApp/SMS Integration

Develop multi-channel communication options to notify customers through WhatsApp and SMS about order confirmations, fitting appointments, loyalty updates, and exclusive offers. This will give customers their preferred communication channels for better engagement.

5. Customer Portal Integration

Build a Customer Community Portal where clients can log in securely. They can view their order history, track the status of their orders in real-time, monitor loyalty points and benefits, and access exclusive member content and early product previews.