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

ABSTRACT

This project represents the implementation of a customized Salesforce CRM solution for **HandsMen Threads**, it is a premium men's fashion and tailoring brand. The objective of this is to streamline the business operations, enhancing customer engagement and maintain data integrity.

This application involves designing a robust data model featuring five custom objects like Customer, Order, Product, Inventory and Marketing Campaign. This business process is automated using Record Triggered Flows, Scheduled Flows, Email Alerts and Apex to handle the order confirmations, loyalty status updates, and proactive stock alerts.

By utilizing Lightning App Builder, record-triggered flows, and Apex triggers, the solution enhances operational efficiency, minimizes manual errors, and improves customer retention.validation rules were established to ensure clean and reliable data.

This end-to-end CRM implementation improves a personalized customer experiences, empowering HandsMen Threads to maintain a competitive edge in the fashion market.

OBJECTIVE

The primary goal of this project is to develop and implement a customized solution to streamline core business operations, maintain data integrity, and enhance customer satisfaction. This centralized system will manage customers, orders, products, inventory, and marketing campaigns, achieving the following:

- Automate key processes such as order confirmations, loyalty status updates, and stock alerts.

- Ensure accurate and consistent data entry through validation rules.

- Provide real-time visibility of inventory and customer interactions.

- Improve internal team coordination with role-based access control.

- Deliver personalized customer experiences through targeted communication and loyalty programs.

TECHNOLOGY DESCRIPTION

Salesforce:

Salesforce is a popular cloud-based CRM platform that helps businesses manage customer interactions and streamline operations. It provides tools for sales, marketing, customer service, and analytics, allowing companies to centralize data, automate tasks, and offer personalized experiences. With an easy-to-use interface and customizable options, it boosts customer satisfaction and supports data-driven decisions.
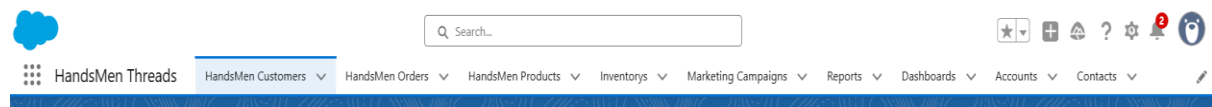
Custom Objects:

Objects in Salesforce is nothing but tables in a database to store specific data.
Examples:

- Customer_c – stores the customer information.
- Product_c – stores product information.
- Order_c – stores order details.

Tabs:

Tabs are used to display object data in the salesforce UI.

Those are the tabs like customers, orders etc… as in the above picture.

Custom APP:

A custom app in Salesforce is an application designed for specific business needs, created with Salesforce tools to include custom data and processes, and integrated with its CRM platform.

Profiles:

Profiles in Salesforce are user permissions that determine what a user can access and do, such as objects, fields, and apps, based on their role, ensuring security and efficient data management.

Roles:

A role in the Salesforce platform is a user's place in the company hierarchy, deciding which records they can view, including their own and subordinates', for effective data sharing and security.

Permission Sets:

Permission sets in Salesforce are additional permissions added to a user's profile, allowing specific access to features or objects, making it easy to customize and secure their rights.

Validation Rules:

Validation rules in Salesforce are checks that ensure data entered meets specific conditions before saving, keeping data accurate with error messages if invalid.

Examples:

- Email must contain @gmail.com.
- Phone number must be 10 digits.

Email Templates:

Email templates in the Salesforce platform are pre-set email designs for sending consistent, professional messages to customers or teams, with adjustable fields like names for uses like order confirmations.

Email Alerts:

Email alerts in Salesforce are automatic emails sent to users or customers when certain actions happen, like a new case, using templates and triggered by workflows to keep everyone updated.

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

Flows:

Flows in Salesforce are automated tools that guide users through business processes by collecting data, performing actions, or updating records without coding. They can be triggered manually or automatically.

- Flow triggers email alerts on a 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.

PROJECT EXECUTION PHASE

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 Saleforce Setup page.

2. Custom Object Creation

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

- **HandsMen Customer** – It stores customer information like email, phone, loyality staus.
- **Handsmen Product** – It stores product catalog details like SKU, price, and stock.
- **HandsMen Order** – It stores orders placed by the customer, 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, plural label and enabled reports/search.
- Saved and created Tabs for each object.

3. Creating the Lightning App

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

4. Validation Rules

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

- **Order Object:** Prevents saving if Total_Amount__c <= 0.
  Error: "please enter correct amount"
- **Customer Object:** Validates email contains @gmail.com.
  Error: Please Correct Gmail"

New HandsMen Customer

* = Required Information

Information

* HandsMen Customer Name

⊘

Complete this field.

Owner

👤 Lingabathina Mohana Lakshmi Kumar

Email ↩

⊘ mohan

Enter a valid email address, such as name@email.com.

Phone

Loyalty Status

--None-- ▼

FirstName

LastName

[Cancel] [Save & New] [Save]

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5. User Role & Profile Setup

- Clone 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 rolebased 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.
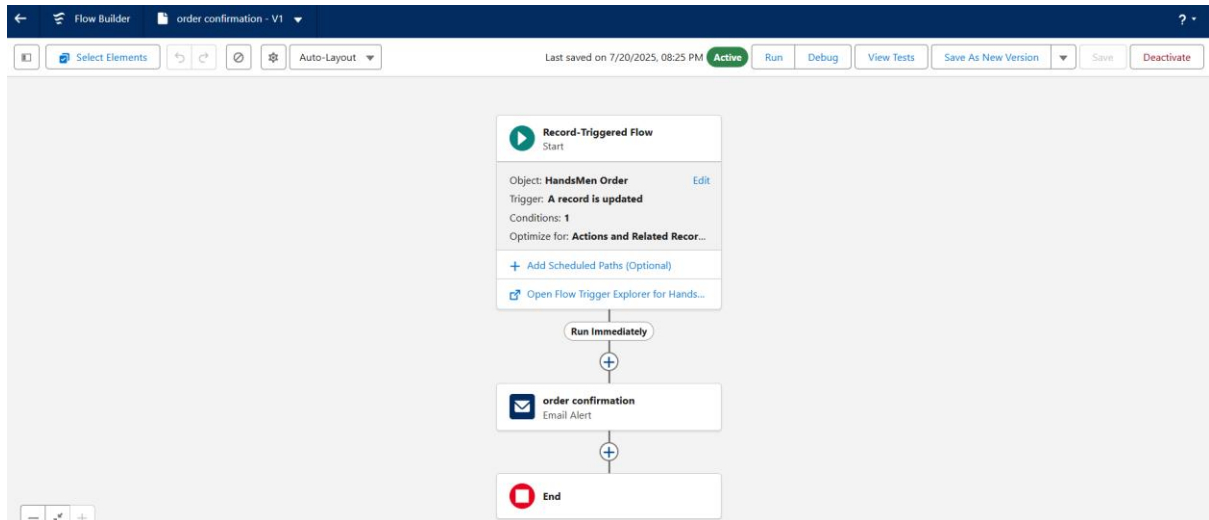- Loyalty program Email – Sent when loyalty status changes.

Corresponding email alerts were created using these templates and linked to automation flows.
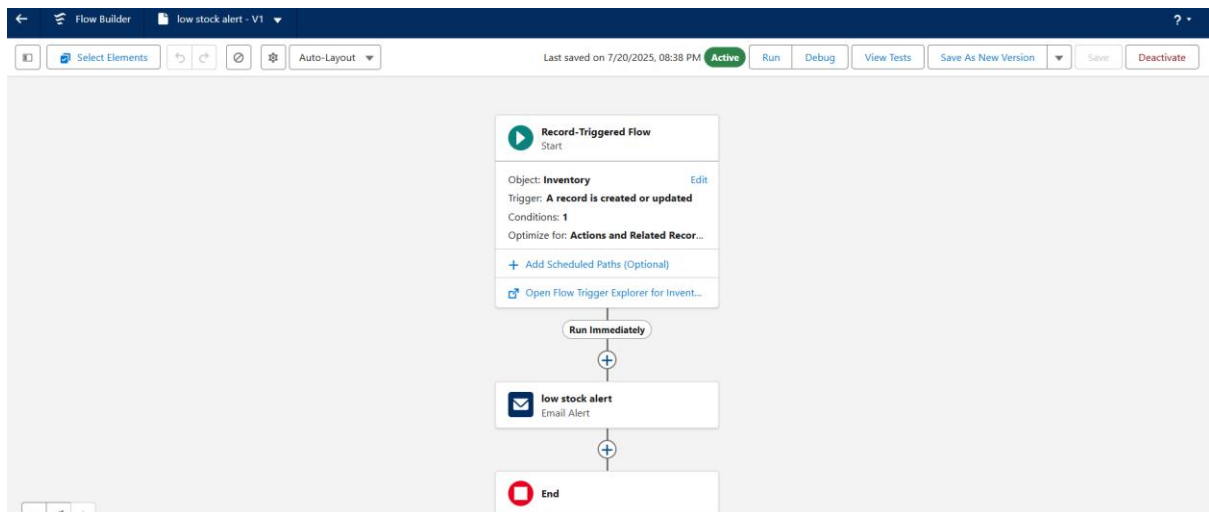
8. Flow Implementations

a. Order confirmation Flow

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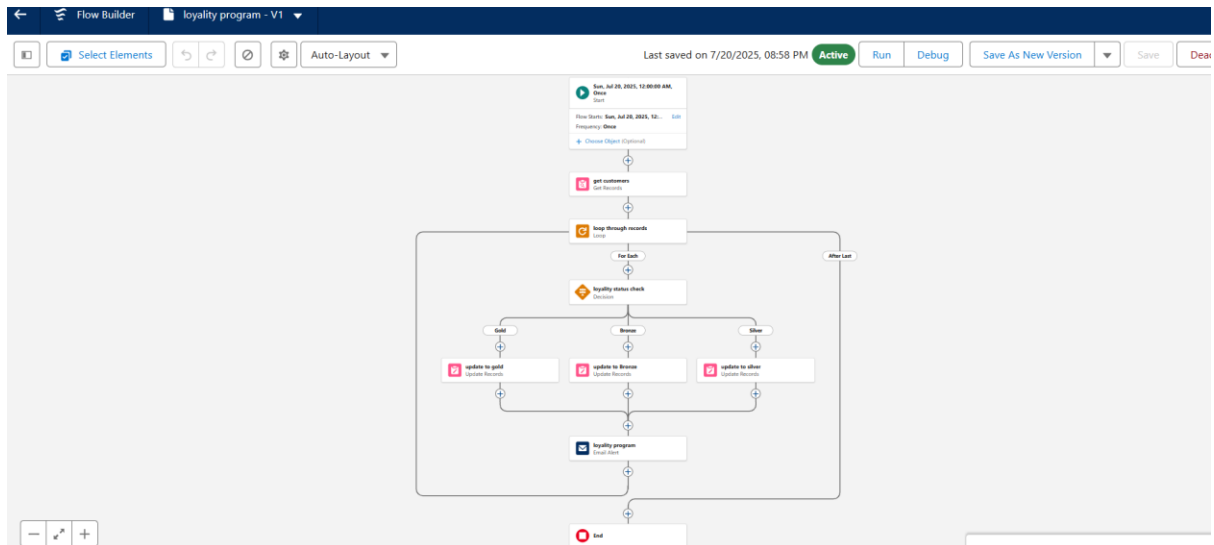- Sends an Order Confirmation Email to the related customer.

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.

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 EXAMPLES

1. **Customer Registration**
   - A customer, Virat, 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__c object.
   - Each product has a price and other details.
   - Inventory is also created to manage stock for these products.
3. **Order Placement**
   - Virat 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__c = 2 x 500 = ₹1000.
4. **Inventory Update**

   As soon as order is placed:

   - Apex Trigger on Inventory: Reduces shirt stock by 2.

- Validation Rule: Ensures stock never goes below 0.

5. **Loyalty Program**
   - Virat 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, virat becomes a Silver member.

6. **Email Notifications**
   - When a new order is placed or loyalty status is updated:
   - Flow + Email Alert is triggered.
   - Virat 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)
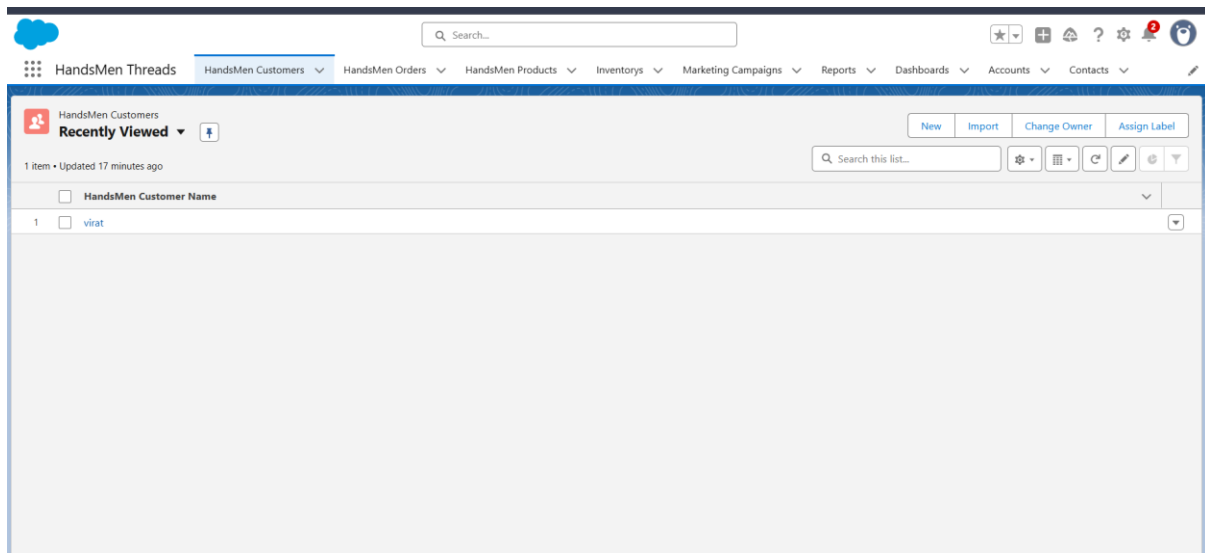
SCREENSHOTS

Fig: Custom App for HandsMen Threads

Fig: Customer creation in HandsMen Threads

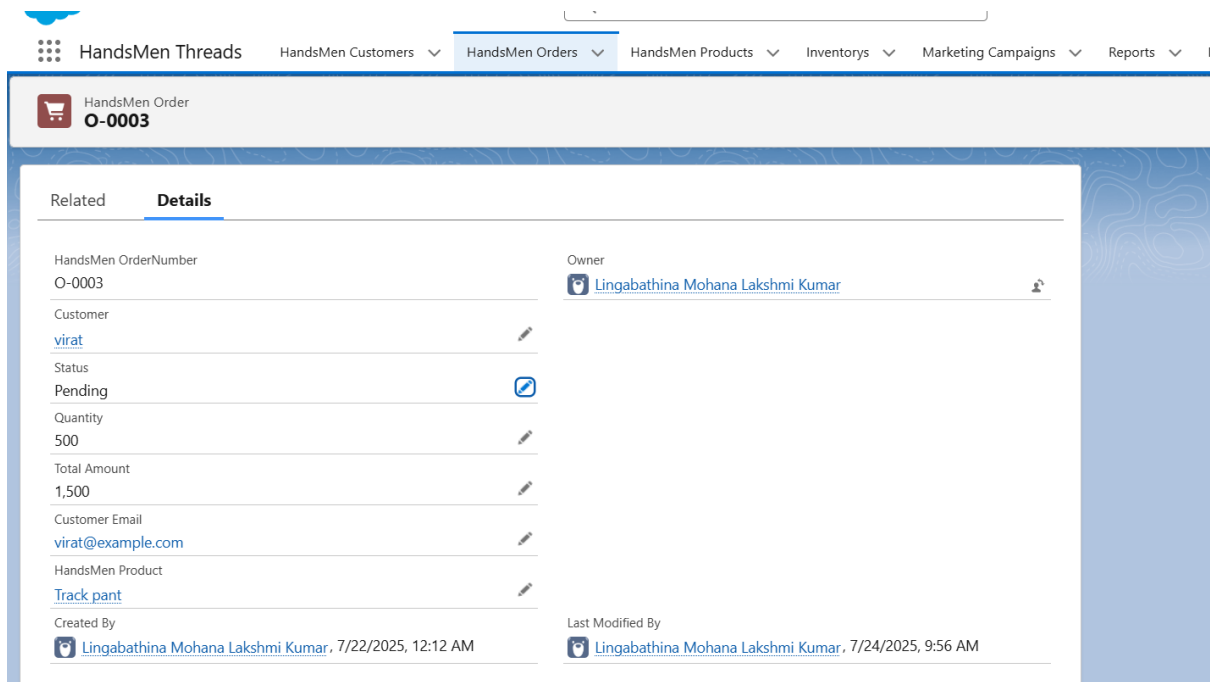**Fig: Product in HandsMen Threads**

Fig: Orders in HandsMen Threads

CONCLUSION:

The HandsMen Threads CRM system was successfully built on Salesforce streamlines the key business processes like Customer Management, Product catologing, Order processing, Inventory tracking, and loyalty program automation. By using tools like Custom Objects, Flows, Validation Rules, Email Alerts, and Apex, ensuring the efficient data entry, security and real-time updates. This avoids the manual errors and speeds up the operations efficiently.