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


## ABSTRACT

The Salesforce CRM project for HandsMen Threads helps the brand run its operations more smoothly by keeping all business information organized and improving how customer interactions are managed. The system tracks customer details, monitors preferences, and ensures regular communication, making it easier for the company to respond to customer needs and provide personalized service.

The CRM includes custom Salesforce components such as objects for customers, orders, inventory, and loyalty programs. Automated features like flows and approval processes, along with role-based security, help maintain accuracy in order management, stock monitoring, appointment scheduling, and customer support. Built-in dashboards and reports give a clear view of sales trends, product performance, and customer activity.

The project follows a clear step-by-step development process, from understanding requirements to deployment and ongoing support. Each stage ensures the system meets business goals while remaining user-friendly and scalable. Future enhancements may include AI-powered recommendations, chatbots for customer engagement, and advanced analytics. Overall, CRM gives HandsMen Threads a practical and modern platform to improve efficiency and customer satisfaction.


## OBJECTIVE

The objectives of the HandsMen Threads Salesforce CRM were carefully defined to ensure that the system fully supports the brand's operational needs, enhances customer engagement, and optimizes internal business processes.

1. To manage customer information, orders, inventory, and loyalty programs in a single organized system.
2. To provide personalized customer service through automated notifications and easy access to customer data.
3. To simplify daily workflows, including order handling, stock updates, and handling pf products.
4. To give clear insights on sales, product performance, and customer behavior using dashboards and reports.

5. To reduce repetitive tasks by automating processes, approvals, and communication within the system.

## TECHNOLOGY DESCRIPTION

The HandsMen Threads project uses Salesforce CRM to manage day-to-day business activities, including customer details, orders, and inventory. The system automates routine tasks such as sending notifications for orders, tracking stock, and updating loyalty badge, which helps reduce manual effort and makes operations smoother.

Custom Salesforce objects are created to organize information about customers, products, orders, and loyalty programs. Relationships and fields are set up to reflect the company's workflow, and rules are applied to make sure data is complete and accurate.

Automatic emails and alerts keep customers and staff informed about important updates, while user permissions are set so each person only accesses the information relevant to their role.

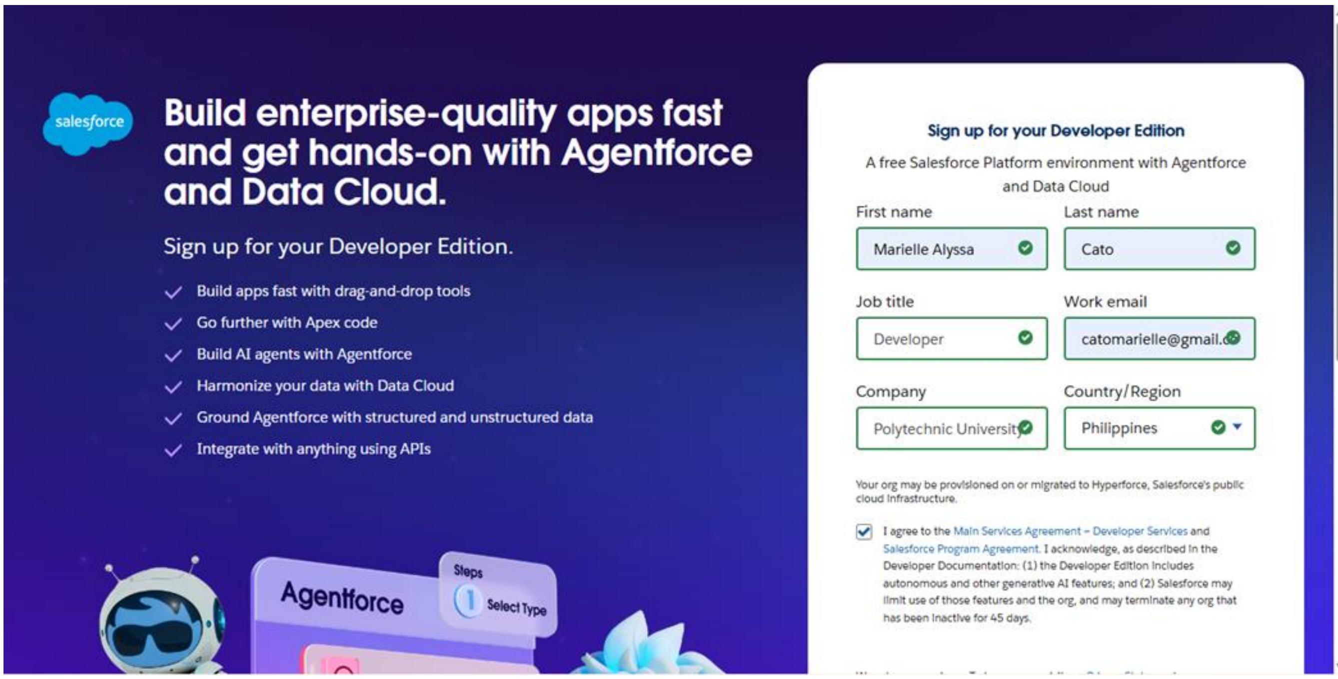
Tools like Data Import Wizard and Data Loader are used to efficiently add and update records. GitHub is used to store project documentation and track changes, while coding or advanced configurations are done with tools like Visual Studio Code when needed.

Dashboards and reports give the team a clear view of sales, stock, and customer behavior, helping managers make better decisions and improve business processes.

# DETAILED EXECUTION OF PROJECT PHASES

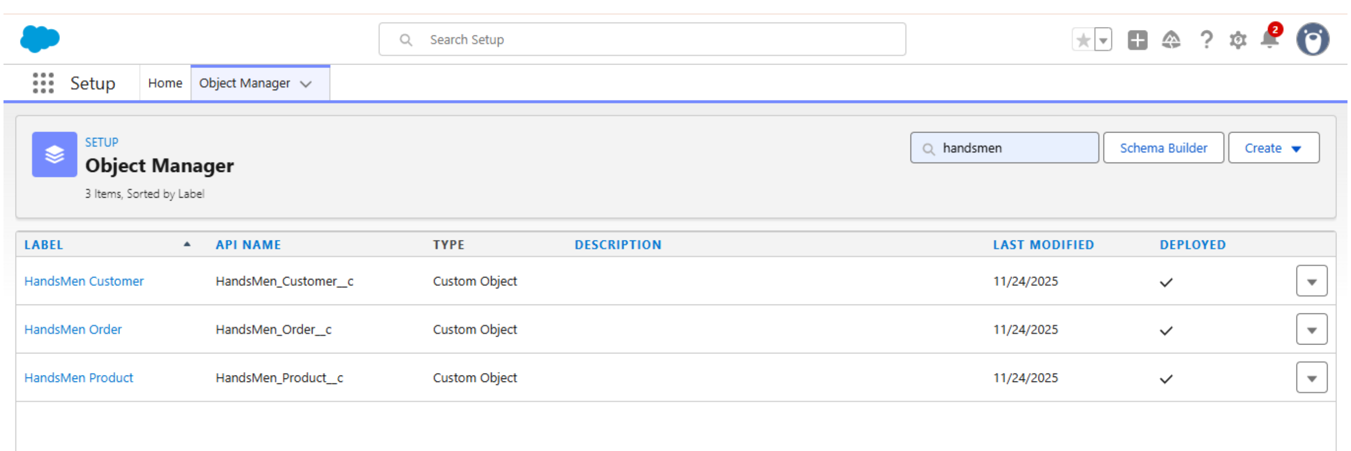
## 1. Developer Account Creation

A Salesforce Developer Org was created to develop, test, and deploy all parts of the HandsMen Threads system.



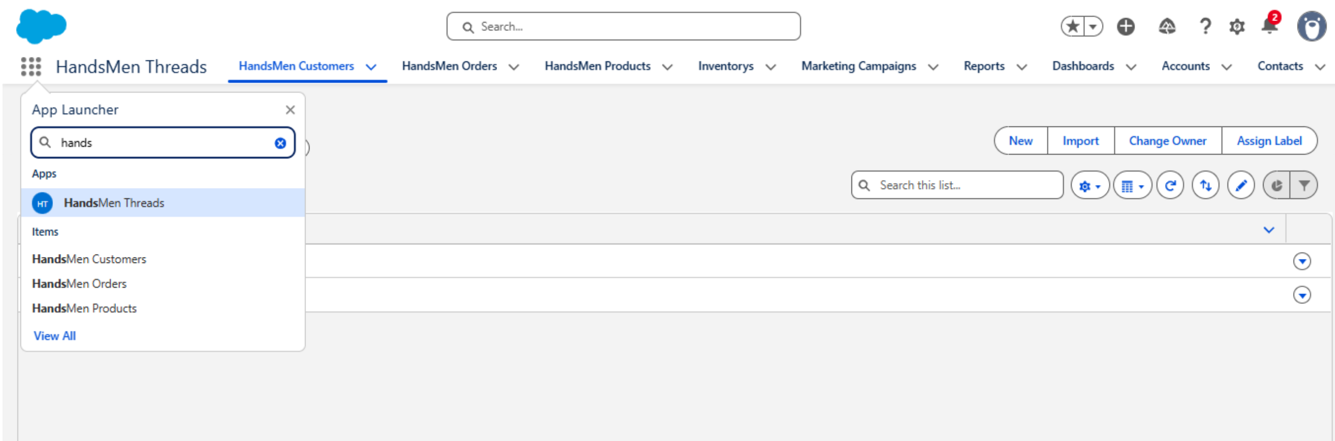

## 2. Custom Data Object Creation

Objects for Customers, Products, Orders, and Loyalty Status were set up to store and manage the company's important data.



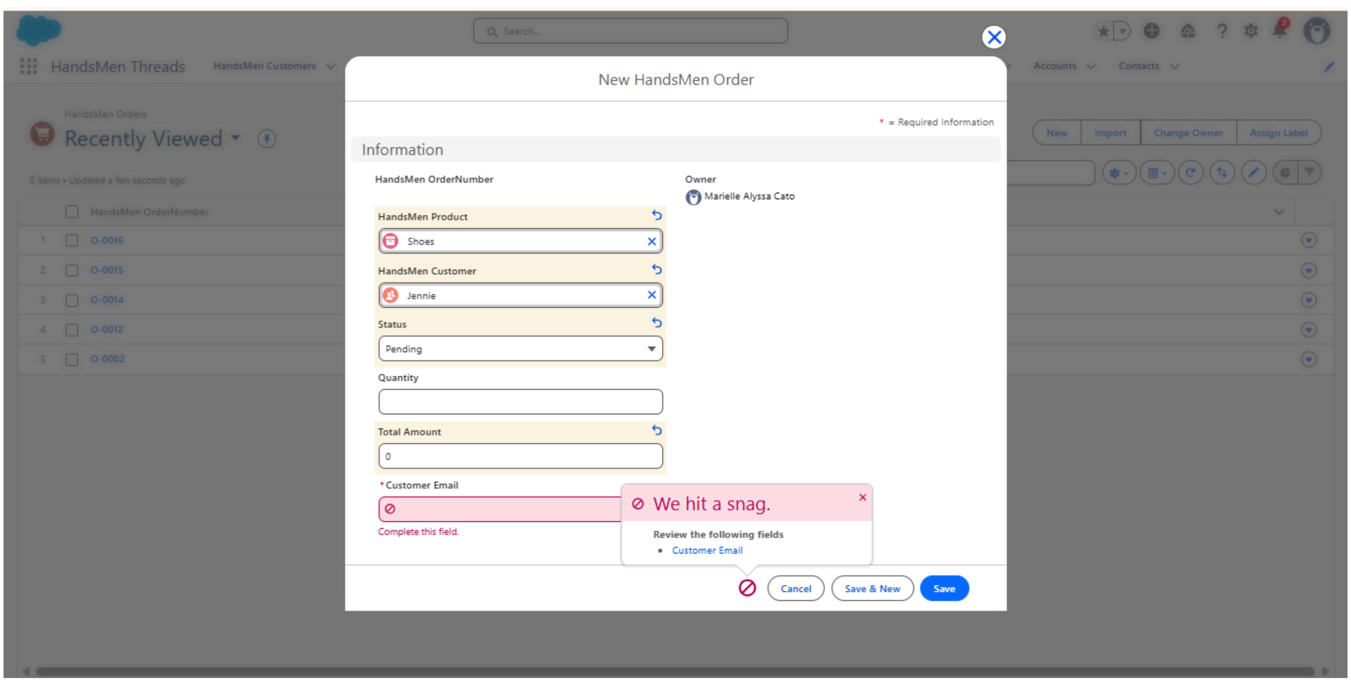
## 3. Setting Up the Lightning App

A Lightning App was created to combine objects, tabs, and navigation tools for a clear and user-friendly CRM experience.



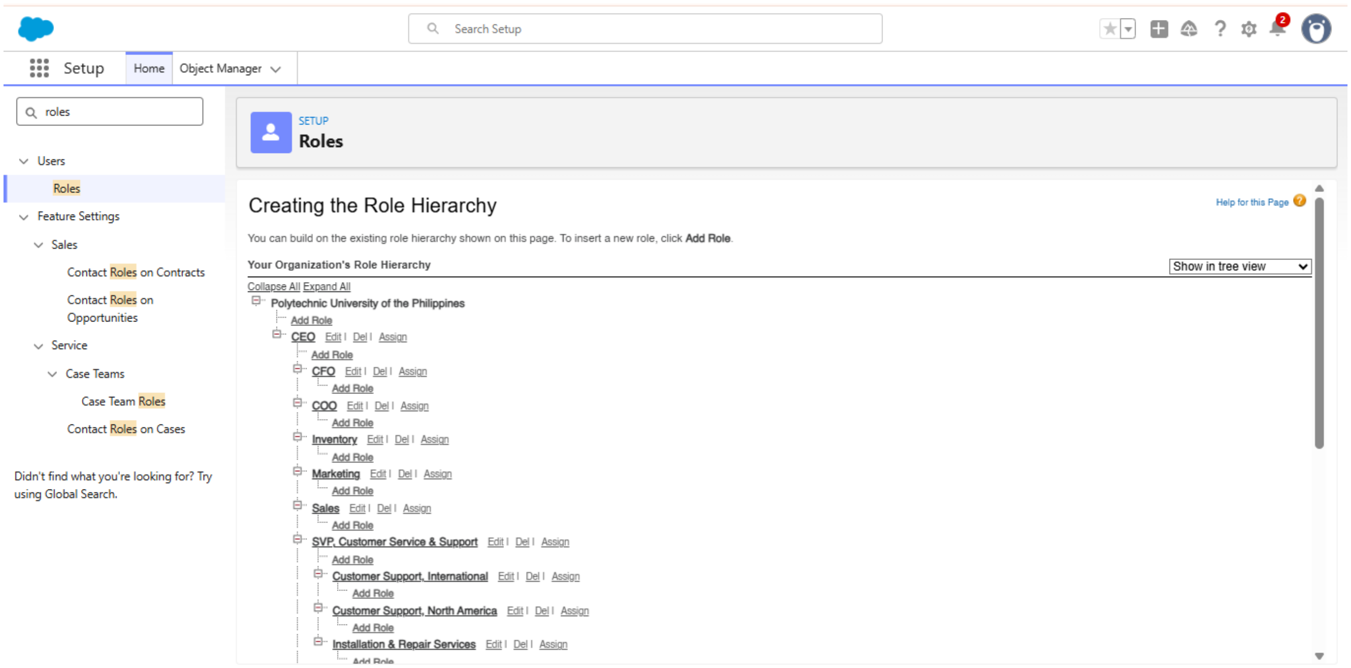

## 4. Validation Rules

Validation rules were applied to ensure key fields are completed correctly, maintaining data accuracy and minimizing errors.



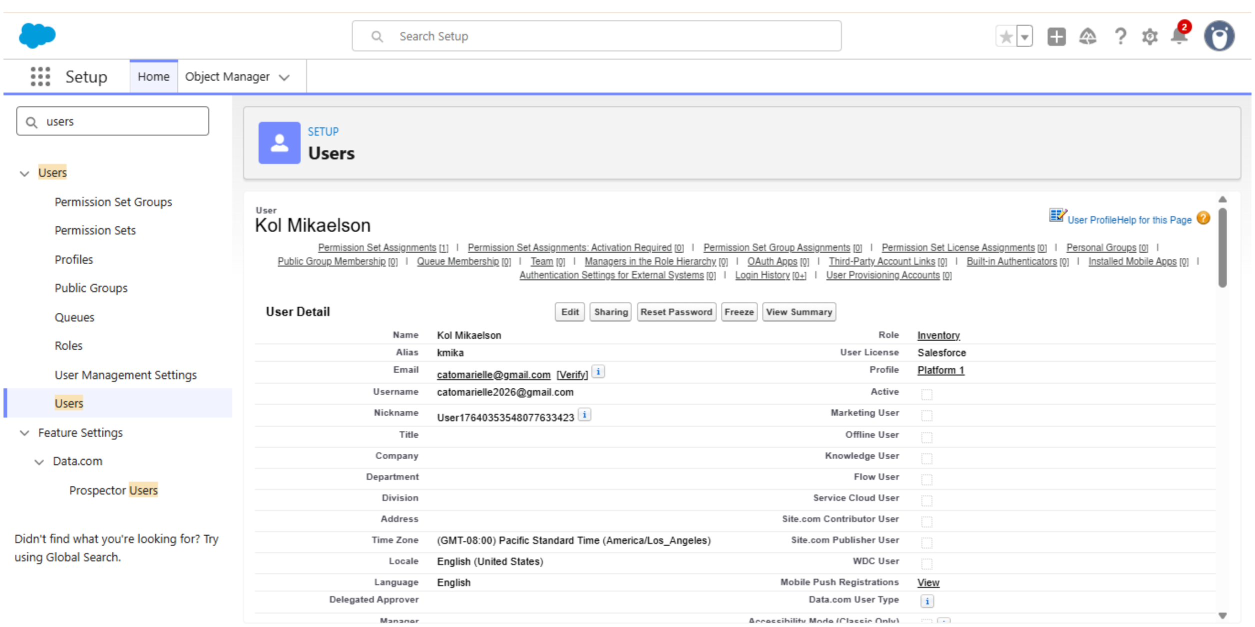
## 5. Configuring User Roles

User roles were configured to reflect the organizational hierarchy, ensuring that access and visibility are limited to records appropriate for each user's role.



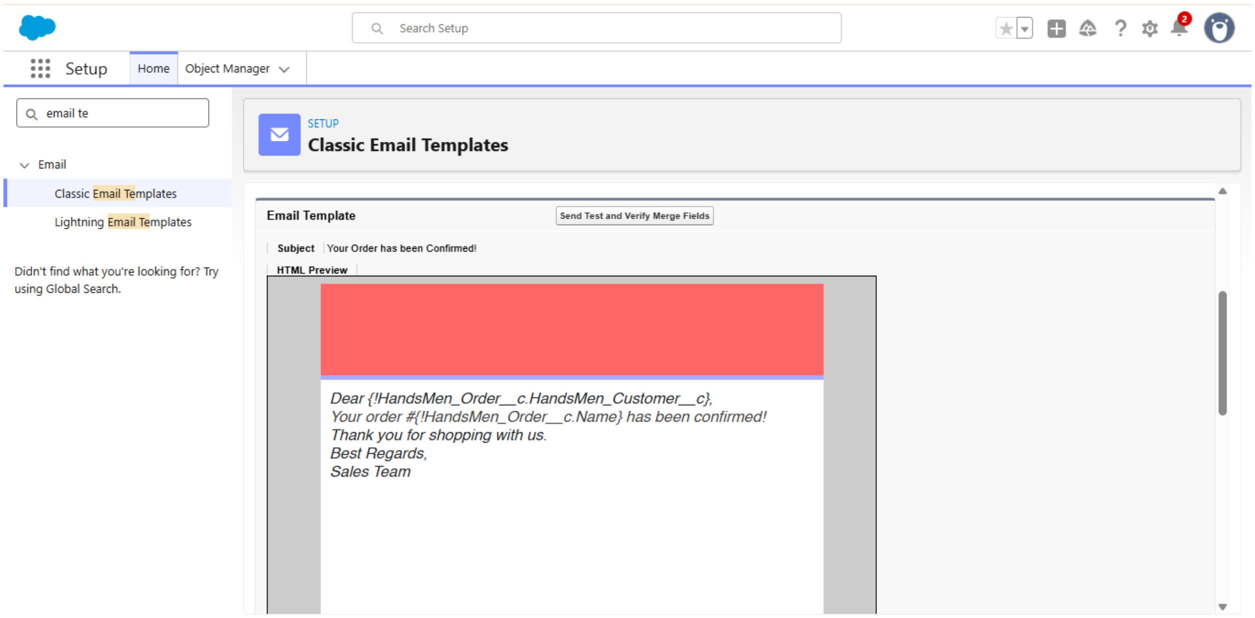

## 6. User Creation

Users were given profiles and permission sets that fit their roles, making sure they have the right access while keeping the system secure.



## 7. Email and Template & Alerts

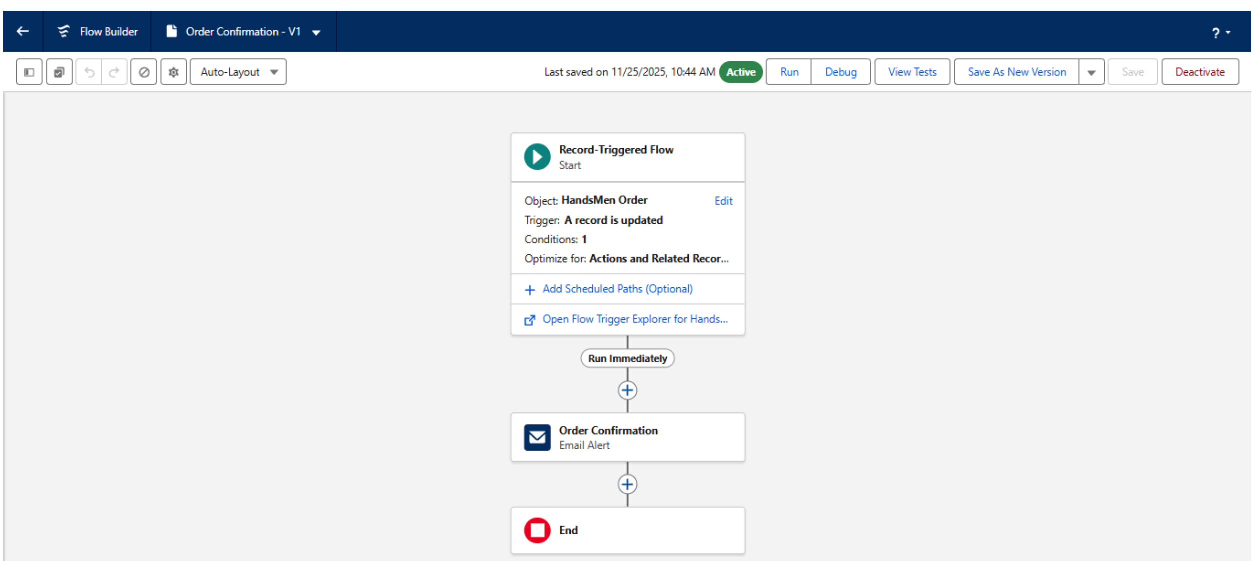
Email notifications and alerts were created to keep customers and staff updated on important actions, like confirmed orders and low inventory.




## 8. Flow Setup and Automation

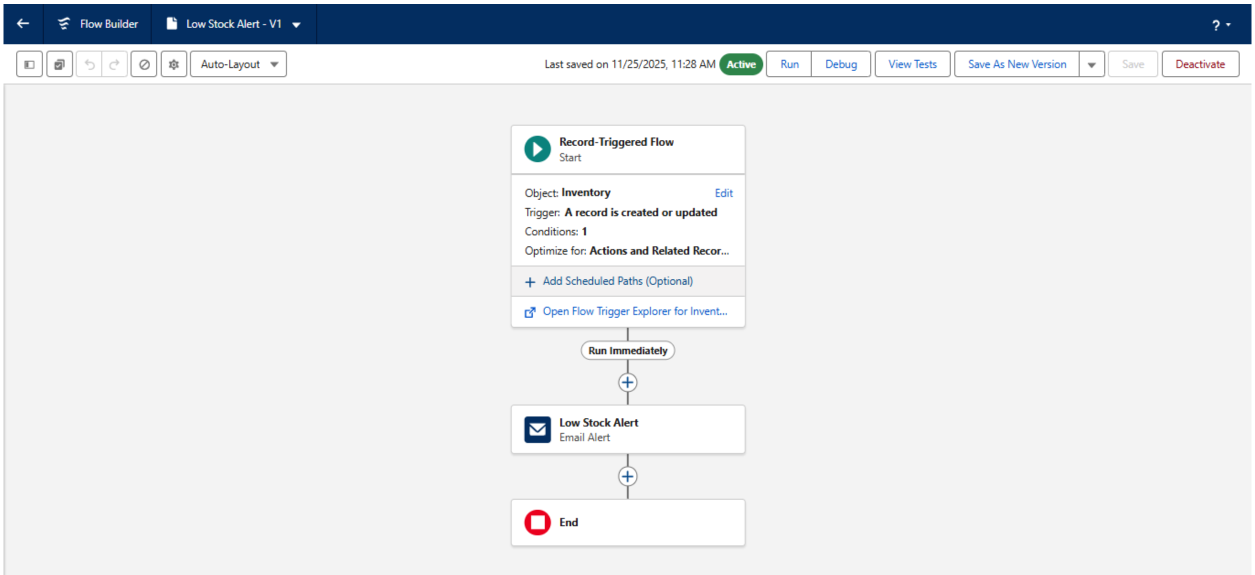
### a. Order Confirmation Flow

Sends an automatic confirmation when an order is placed.



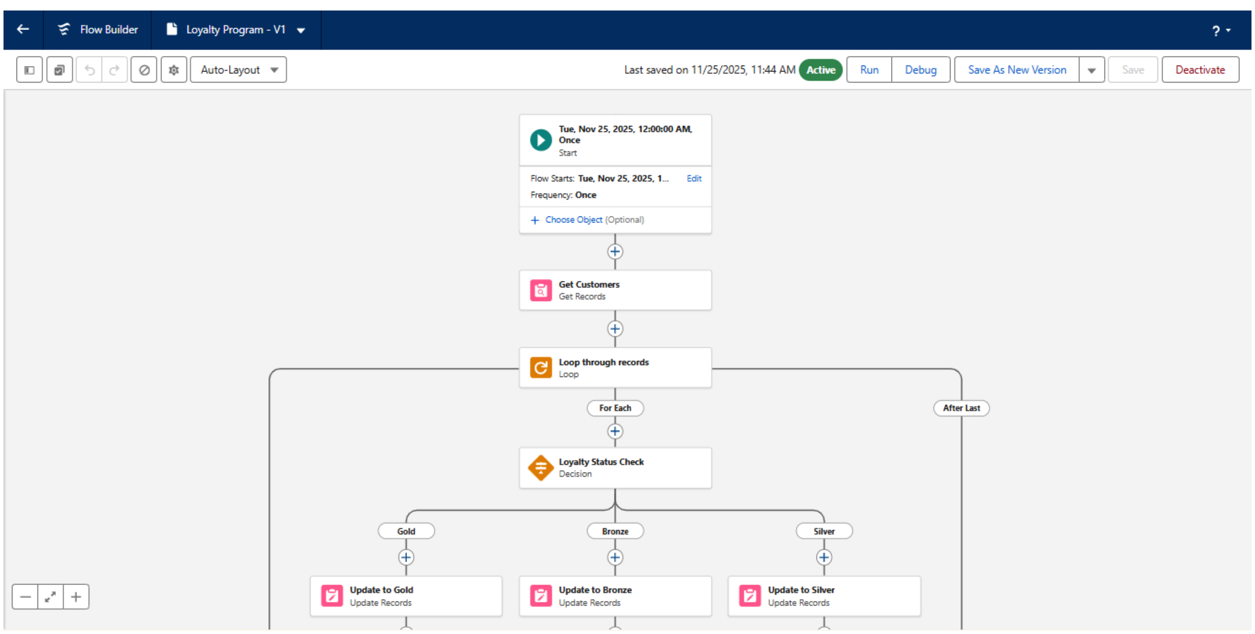
## b. Stock Alert Flow

Automatically informs staffs when items reach low-stock levels.




## c. Scheduled Flow: Loyalty Update

Updates loyalty tiers by reviewing customer actions and point totals regularly.



9. **Apex Triggers**

- **Order Total Trigger**
  Automatically computes the total amount of an order using the prices and quantities of the selected products.
- **Stock Deduction Trigger**
  Reduces the inventory count each time an order is completed to keep stock records up to date.
- **Loyalty Status Trigger**
  Updates a customer's loyalty level based on their past purchases and earned points to support the rewards system.

## PROJECT USAGE IN REAL-WORLD

The Salesforce CRM project for HandsMen Threads supports daily business activities and improves how the company interacts with customers. By bringing customer records, sales information, and inventory data into one reliable platform, staff can access important details quickly and accurately. Automated features—such as order notifications, inventory updates, and loyalty adjustments—help reduce manual work and allow employees to focus on delivering better service. Below are real-world examples of how the system is used in real situations:

1. **Improved Customer Interaction -** Sales teams can instantly review a customer's past purchases and style preferences, allowing them to give more personalized recommendations and build stronger customer relationships.

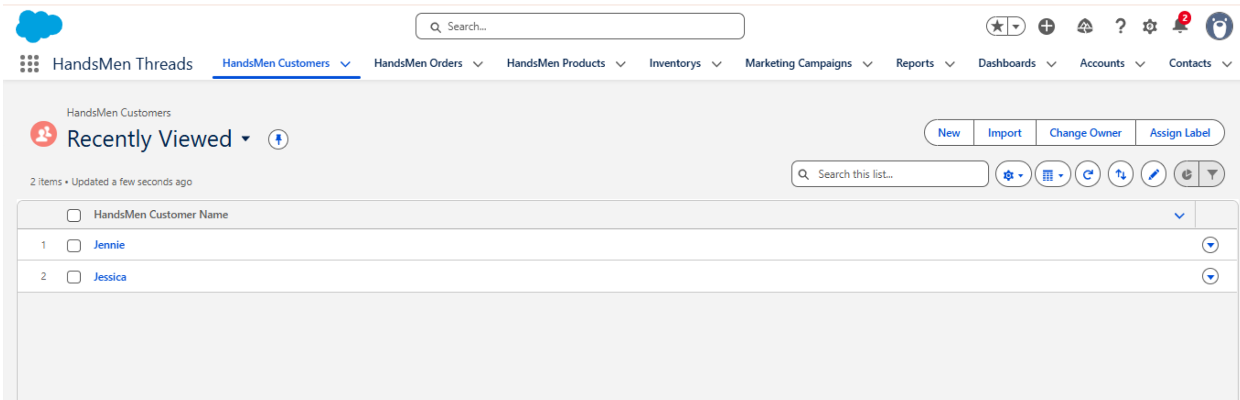
2. **Instant Stock Checking -** Employees can easily check whether an item or size is available in the inventory before completing a sale, helping avoid delays and mistakes.

3. **Faster Sales Assistance -** Staff can quickly access customer profiles—including order history, size details, and loyalty status—allowing them to assist customers more efficiently during transactions.

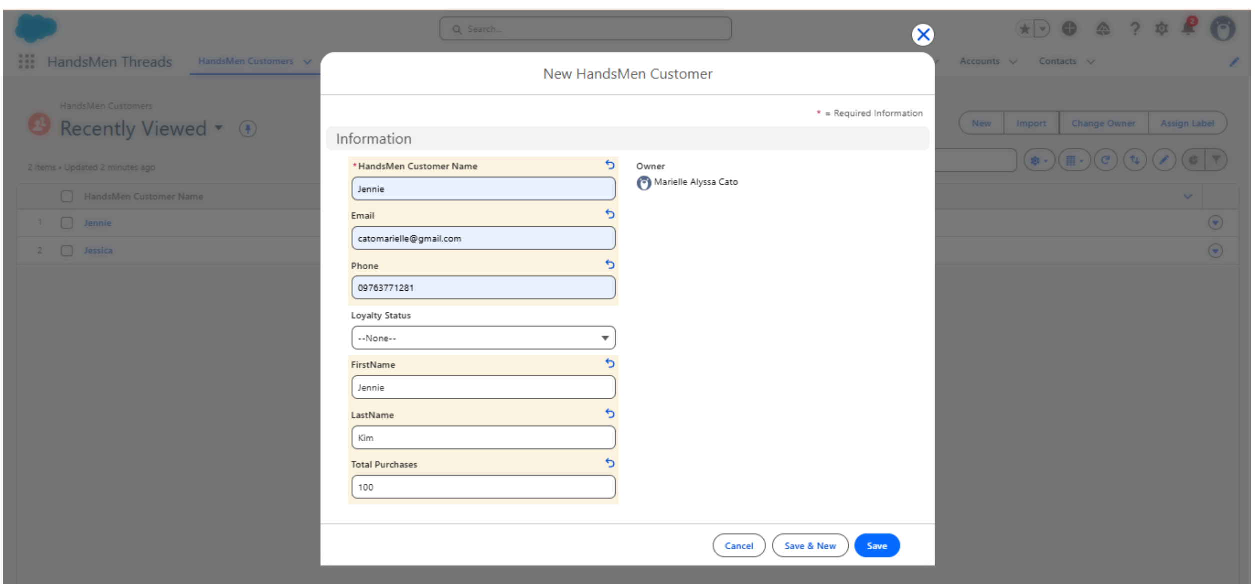
4. **Automatic Inventory Reminders -** The system alerts the inventory team when product levels drop too low, helping ensure items are restocked on time and preventing stock shortages.

# SCREENSHOTS

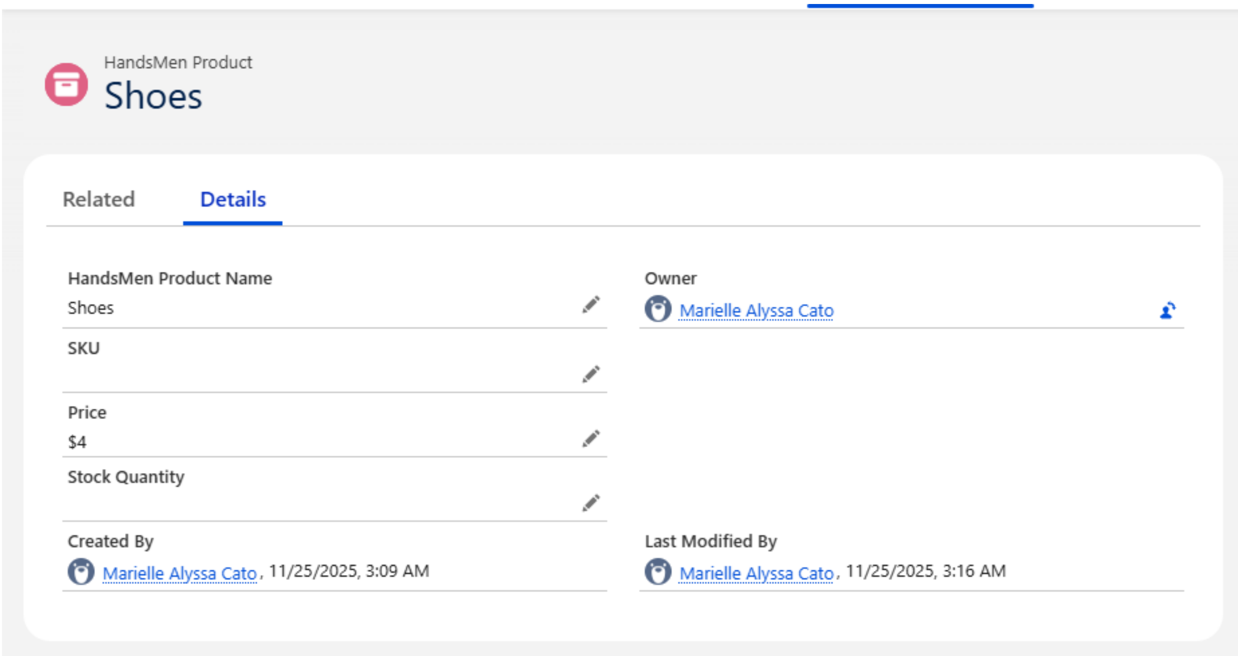
## Fig 1: Custom App for HandsMen Threads



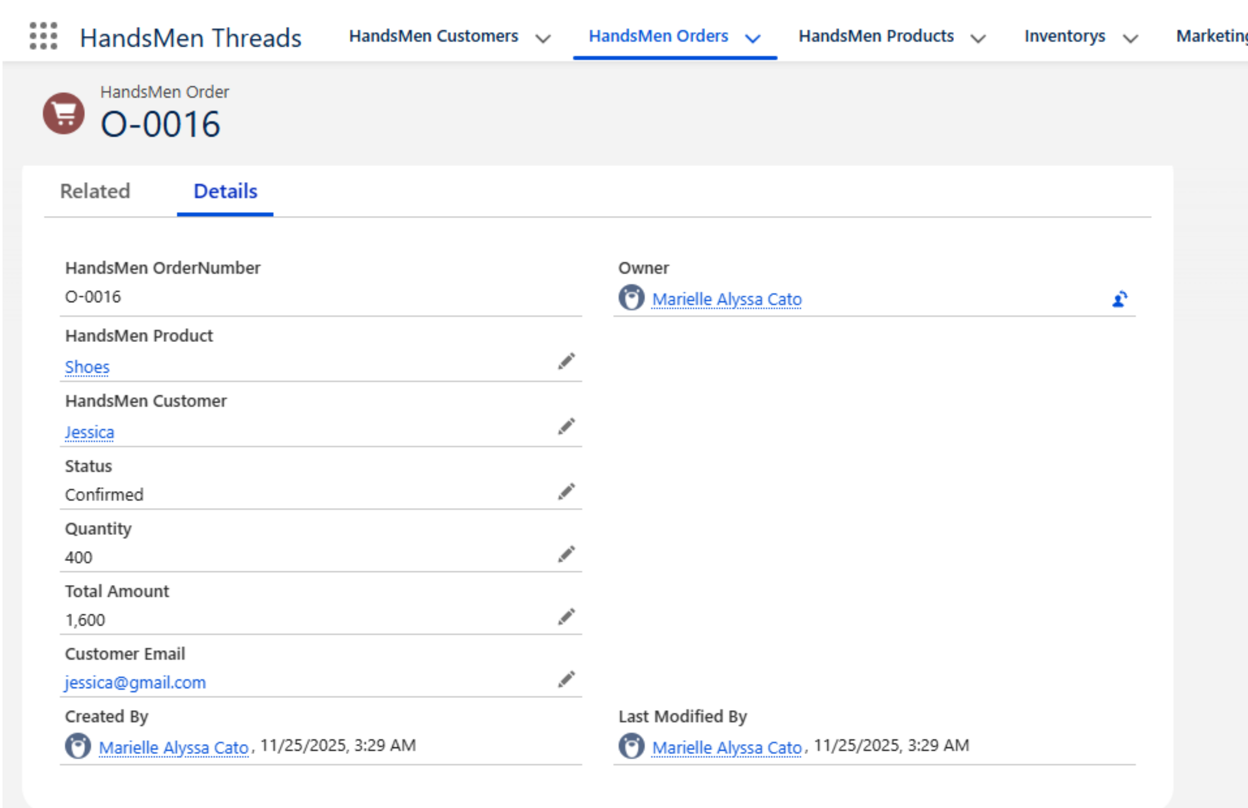

## Fig 2: Customer Creation



## Fig 3: Products Example




## Fig: Order Confirmation



# CONCLUSION

The Salesforce CRM implementation for HandsMen Threads demonstrates how digital tools can significantly improve daily operations in the fashion retail business. Centralizing customer profiles, product data, and sales processes allows the team to work more efficiently and maintain accurate information across all departments. Automated features such as order processing, stock monitoring, and loyalty updates that help reduce manual workload and support faster, more consistent service. With real-time insights and organized data, staff can better understand customer needs and deliver a more personalized shopping experience. Overall, this project enhances operational reliability, strengthens customer relationships, and prepares HandsMen Threads for long-term growth in an increasingly competitive market.

## Future Scope

As HandsMen Threads continues to grow, additional features can be introduced to further improve system performance and customer satisfaction:

1. **Customer Feedback and Returns -** Add tools for collecting feedback and managing returns to ensure better service quality.
2. **Connecting Online Sales Systems -** Connect online sales platforms to Salesforce for unified order, customer, and inventory management.
3. **Mobile CRM Access -** Provide mobile access for staff to assist customers quickly and manage tasks on the go.
4. **AI-Driven Product Suggestions -** Use AI tools to recommend items based on purchase history and preferences, boosting sales opportunities.
5. **Automated Marketing Enhancements** – Design personalized campaigns to increase customer interaction.