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

ABSTRACT

The HandsMen Threads CRM is a fully customized Salesforce system designed to support a growing men's fashion brand by centralizing and streamlining all key business operations. It organizes customer, order, inventory, and marketing data in a single workspace, automating processes like order management, stock updates, and data validation to reduce errors and improve efficiency.

Using custom Salesforce components including objects for customers, products, orders, and marketing campaigns, along with validation rules, flows, and Apex triggers the CRM provides full visibility into customer behavior, product availability, and overall sales performance. Automated workflows, email notifications, and scheduled processes help maintain consistent communication, track loyalty programs, and manage inventory in real time.

Built-in dashboards and reports give management actionable insights into sales trends, product performance, and marketing effectiveness. The development process followed a structured approach from requirement gathering to deployment and ongoing support, ensuring the system meets business goals while remaining scalable and user-friendly.

OBJECTIVE

The objectives of the HandsMen Threads Salesforce CRM were carefully defined to ensure the system supports business growth, enhances customer management, and streamlines internal operations.

1. To centralize customer information, orders, inventory, and marketing data in a single, organized system.
2. To improve customer engagement and service through automated notifications and easy access to relevant customer information.
3. To simplify daily business processes, including order management, stock updates, and product handling.
4. To provide clear insights into sales, product performance, and customer behavior using dashboards and reports.
5. To reduce manual tasks and increase efficiency through automation of workflows, approvals, and communication within the system.

TECHNOLOGY DESCRIPTION

The HandsMen Threads project uses Salesforce CRM to handle daily business operations, including managing customers, processing orders, and tracking inventory. It automates repetitive tasks like sending order updates, monitoring stock, and updating loyalty information, which saves time and makes workflows more efficient.

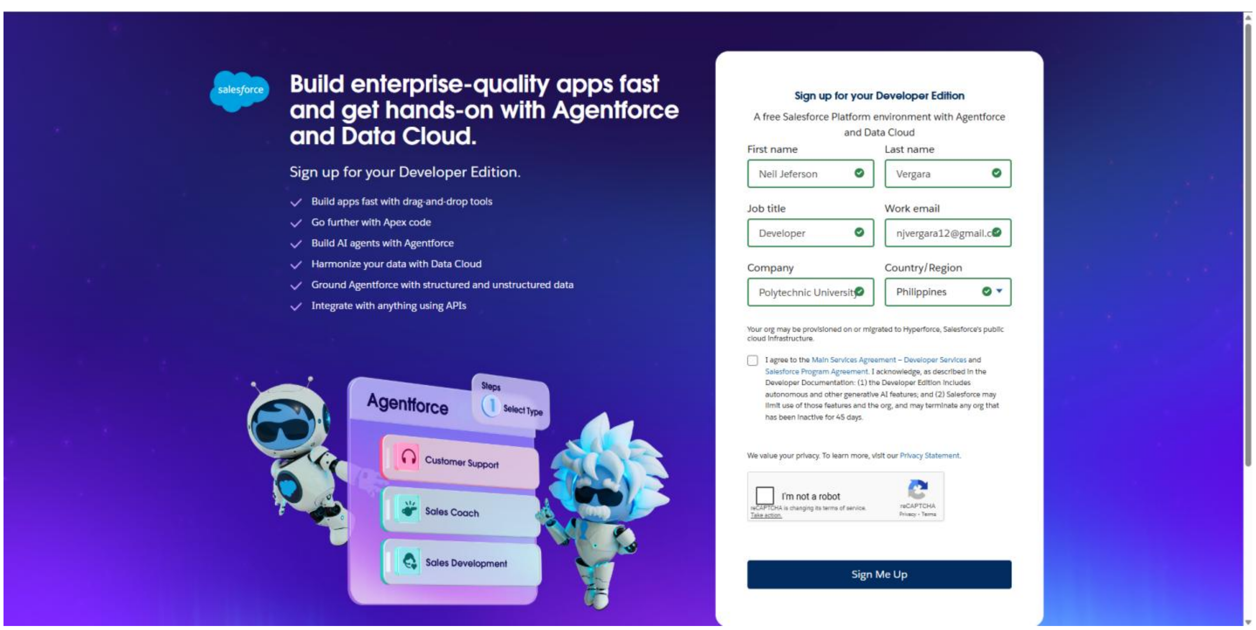
Custom Salesforce objects were created to store information about customers, products, orders, and loyalty programs in an organized way. The system uses fields, relationships, and rules to match how the business works and ensure data is correct. Notifications and automatic emails keep employees and customers informed, while access permissions make sure people only see the information they need.

Tools such as Data Import Wizard and Data Loader make it easier to add and update records in bulk. GitHub is used to save project documents and monitor changes, and advanced setup or coding is handled with tools like Visual Studio Code. Dashboards and reports give teams a clear picture of sales, inventory, and customer activity, helping managers make smarter decisions and improve processes.

DETAILED EXECUTION OF PROJECT PHASES

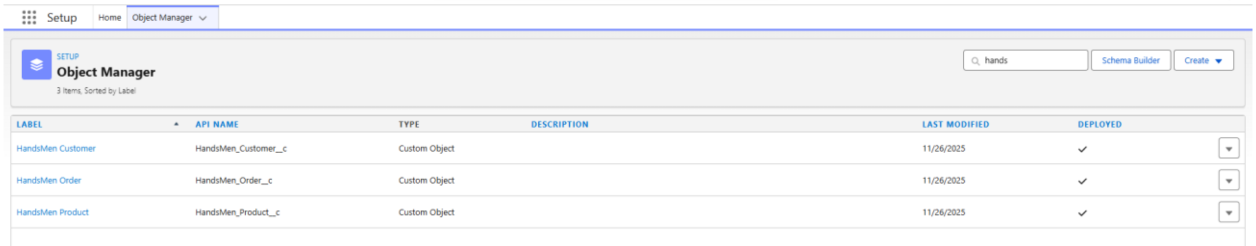
1. Developer Account Creation

- Salesforce development org was set up using Salesforce Dev Org through this link https://developer.salesforce.com/signup



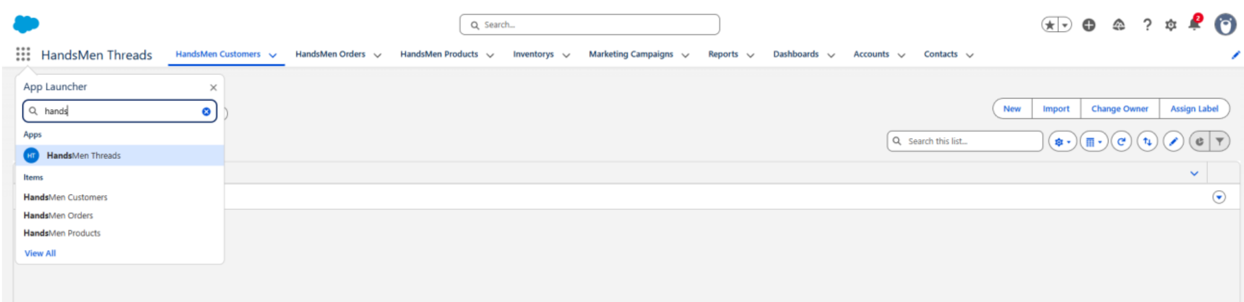
2. Custom Data Object Creation

- We Build a custom objects and fields to store all essential business information.



3. Setting Up the Lightning App

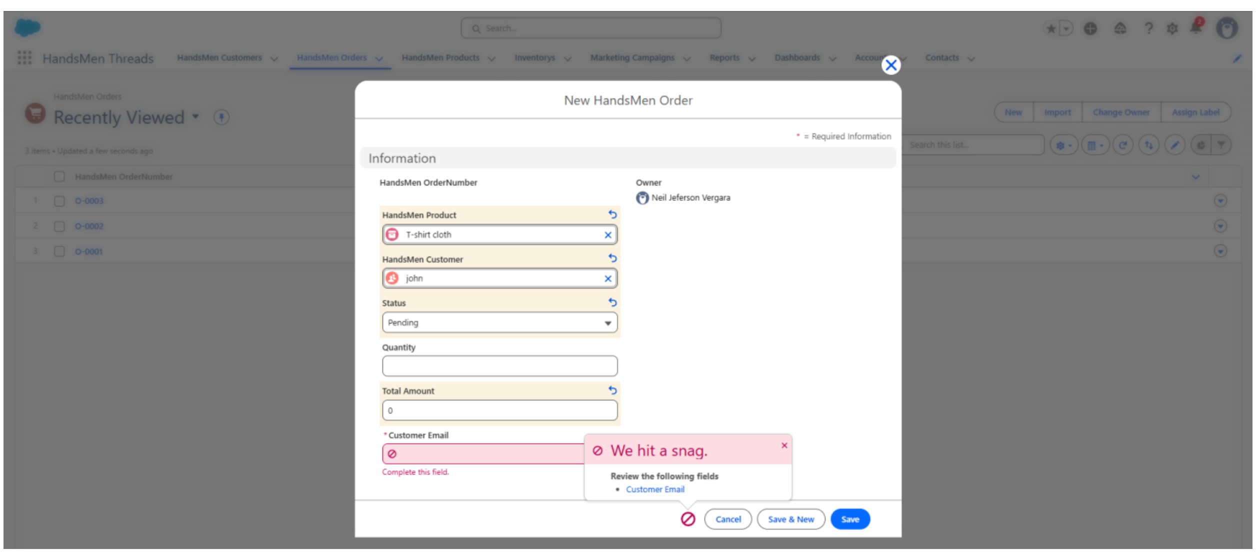
- The creation of the custom lightning app the "HandsMen Threads" Lightning App, which brings together all essential tabs Customer, Order, Product, Inventory, Campaign, and Reports to provide a single, streamlined workspace for our teams.



4. Validation Rules

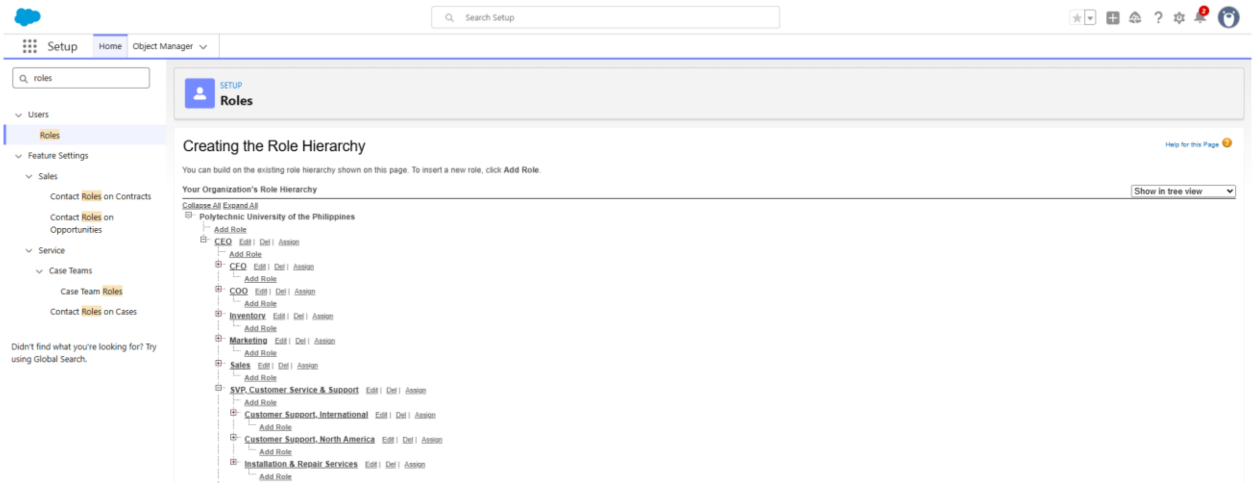
For validation rules i implemented rules to maintain data quality:

- **Product Stock:** Ensures Stock__c cannot be set below zero.
- **Customer Email:** Requires the Email field to include “@gmail.com”.



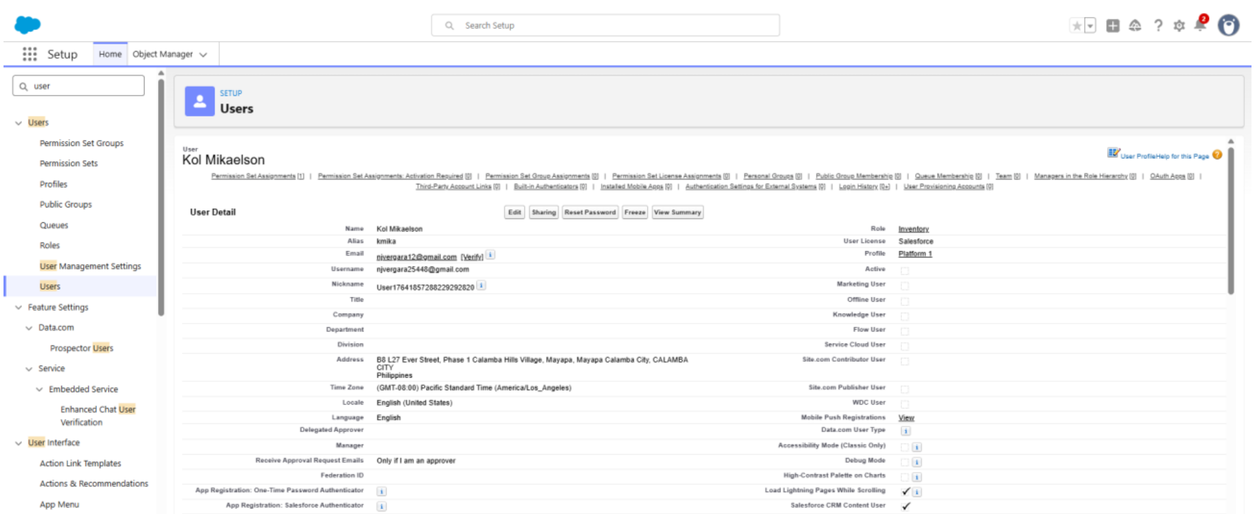
5. Configuring User Roles

- User roles were set up to match the company's structure, making sure each person can only access and see the information relevant to their position.



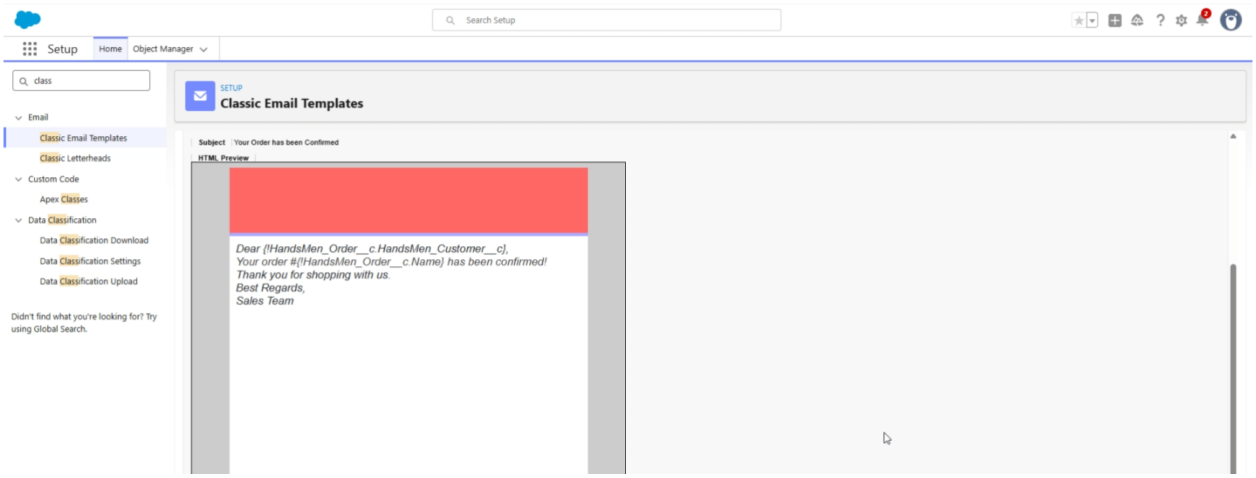
6. User Creation

- I added multiple users to the system and placed each one in the correct role and profile. For example, Niklaus Mikaelson was set up under the Sales team, while Kol Mikaelson was assigned to the Inventory team. This setup helped showcase how the platform supports different users working within their own permissions and responsibilities.



7. Email and Template & Alerts

- Automatic emails and alerts were set up to inform both customers and staff about key events, such as order confirmations and low stock levels.



8. Flow Setup and Automation

a. Order Confirmation Flow

- Automatically sends a confirmation to the customer whenever a new order is placed.

b. Stock Alert Flow

- Notifies staff automatically when products reach low inventory levels.

c. Scheduled Flow: Loyalty Update

- Regularly updates customer loyalty tiers based on their purchase activity and accumulated points.

9. Apex Triggers

- **Order Total Trigger (OrderTrigger):** Automatically calculates and updates an order's total amount based on the quantity and unit price.
- **Stock Deduction Trigger (ProductStockUpdateTrigger):** Reduces product stock accurately whenever an order is placed.
- **Loyalty Status Trigger (CustomerLoyaltyUpdateTrigger):** Updates a customer's loyalty status in real time according to their cumulative purchase history.

PROJECT USAGE IN REAL-WORLD

The Salesforce CRM project for HandsMen Threads was built through a clear and organized roadmap that guided every step of the development process. The team first set up the Salesforce environment and created the needed objects, fields, and security settings to support customer, order, and inventory data. After the structure was ready, automations like order emails, stock updates, and loyalty changes were added to make daily tasks faster and reduce manual work. The final steps included setting up the user interface, testing all features, loading sample data, and deploying the system so it can be used smoothly by the team.

Below are the main stages completed during the CRM development:

1. **Setup and Data Structure** – The Salesforce org was prepared, and custom objects, fields, and relationships were created to organize all business information.
2. **Security and Validation** – Profiles, roles, permission sets, and validation rules were added to protect data and ensure correct information is entered.
3. **Automation and Backend Logic** – Flows and Apex triggers were created to update stock, calculate order totals, and adjust loyalty levels automatically.
4. **UI Setup and Deployment** – Lightning pages, layouts, and the custom app were built, followed by testing, data migration, and final deployment of the CRM.

SCREENSHOTS

Fig 1: Custom App for HandsMen Threads

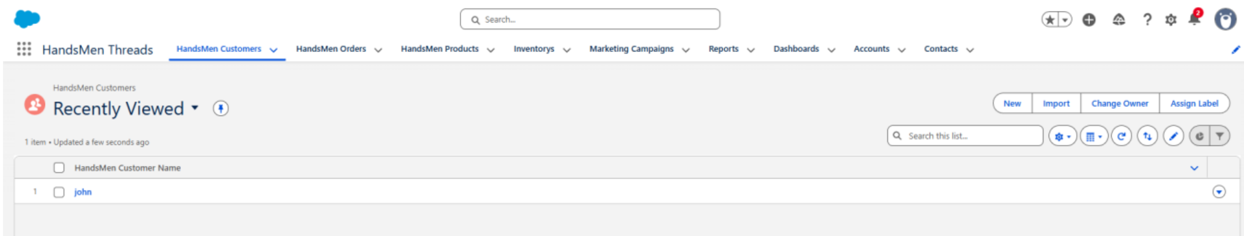


Fig 2: Customer Creation

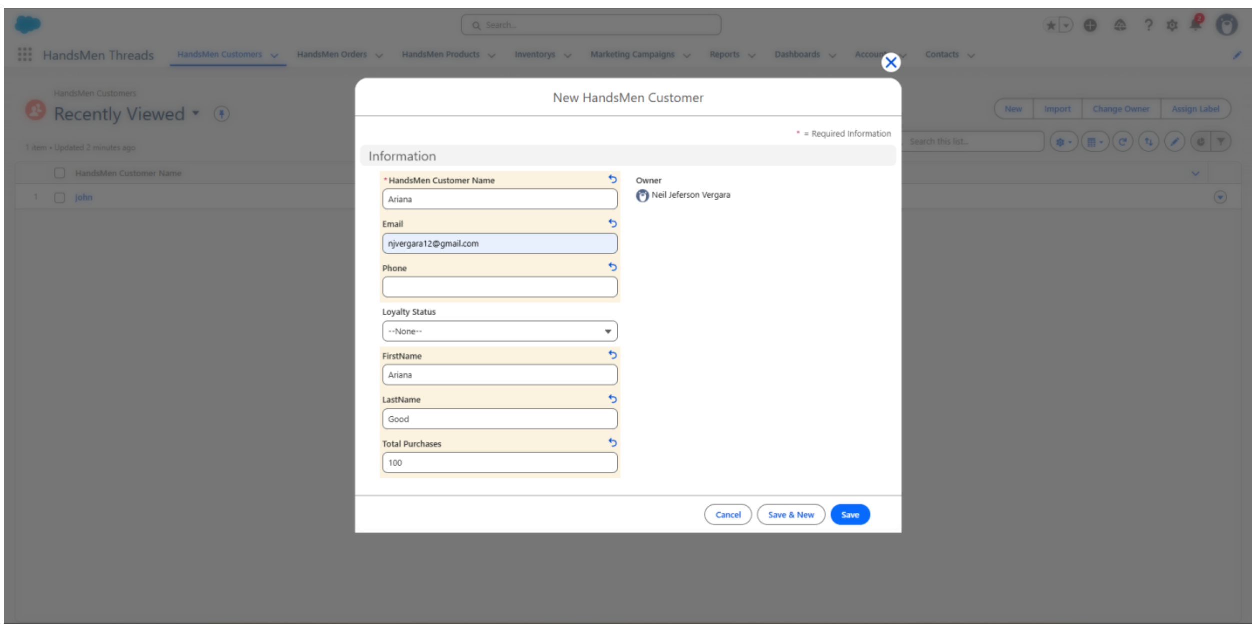


Fig 3: Products Example

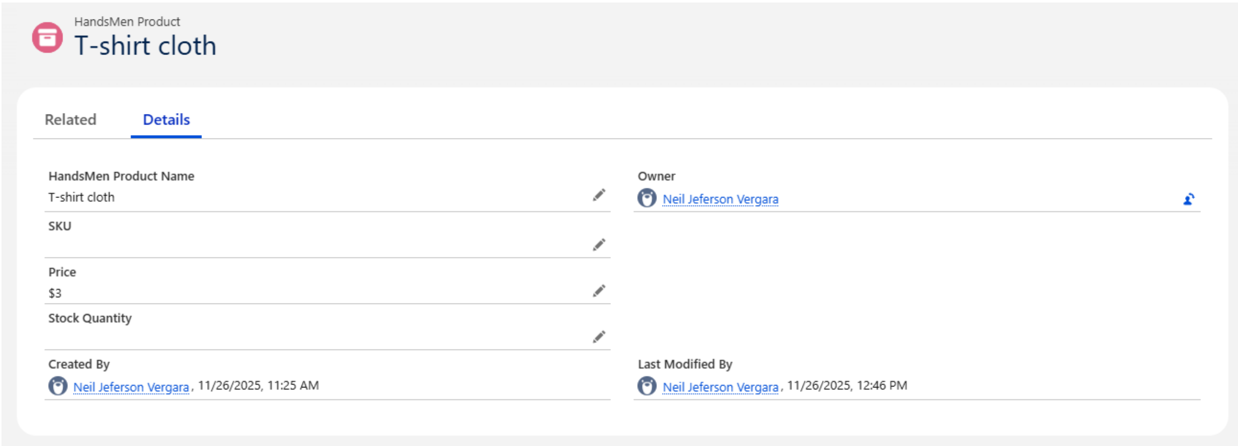
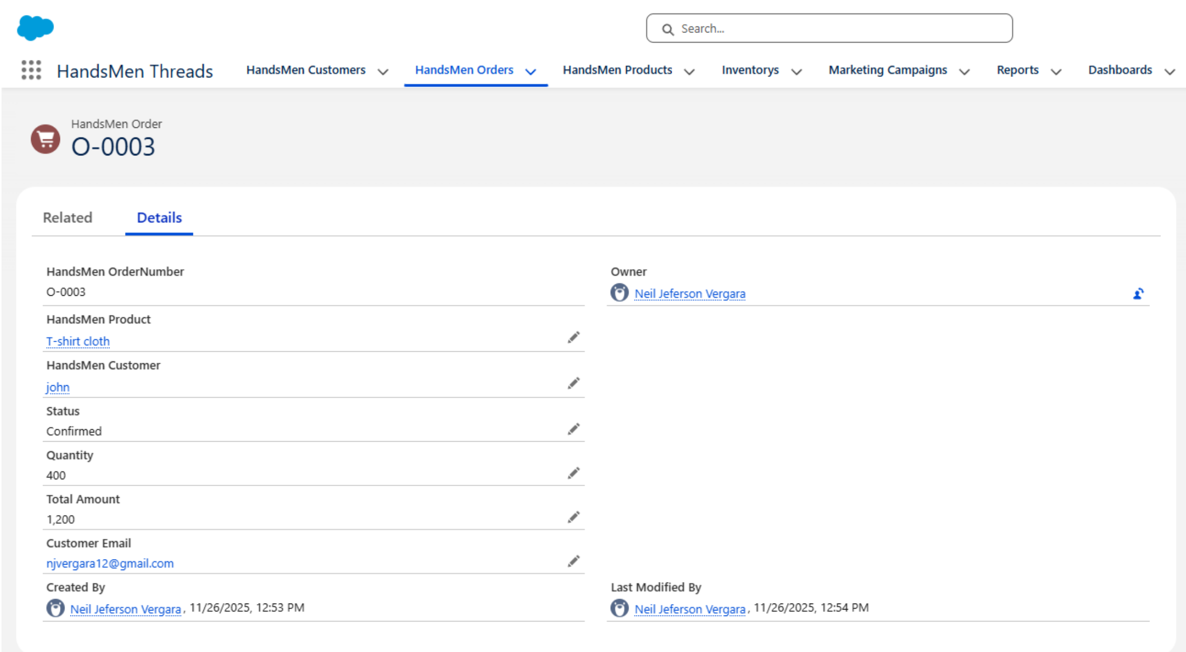


Fig: Order Confirmation



CONCLUSION

The Salesforce CRM implementation for HandsMen Threads shows how a well-built digital system can greatly improve the company's daily sales and inventory operations. By bringing customer records, product details, and order information into one organized platform, the team can work more efficiently and keep data accurate across all departments. The automated features such as order calculations, stock updates, and loyalty adjustments help reduce manual work and support faster, more consistent service for customers. With clear insights and updated information, staff can understand customer needs better and provide a more personalized and reliable shopping experience. Overall, this CRM project strengthens customer relationships, improves workflow, and prepares HandsMen Threads for steady growth in a competitive fashion market.

FUTURE SCOPE

As HandsMen Threads continues to grow, the CRM can be improved with more features that support better service and smoother operations:

1. **Customer Feedback and Return Handling –** Add a section where customers can share feedback and where staff can manage returns easily.
2. **Online Store Connection –** Link the company's online shop to Salesforce so all orders, customers, and stock updates stay in one system.
3. **Mobile Access for Staff –** Allow employees to use the CRM on their phones or tablets to assist customers anytime and anywhere.
4. **Smart Product Suggestions –** Use simple AI tools to recommend products based on what customers previously bought or liked.
5. **Improved Marketing Automation –** Add features that send personalized messages and promotions to help keep customers engaged.