

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

Abstract

This project centers on designing and deploying a customized Salesforce CRM solution for HandsMen Threads, a premium brand renowned for men's fashion and bespoke tailoring. The initiative aimed to optimize internal operations, strengthen customer relationships, and ensure consistent and accurate data management across all business units.

The CRM system was built upon a tailored data model encompassing five core objects: Customer, Order, Product, Inventory, and Marketing Campaign. Key processes—including order confirmations, loyalty program tracking, and inventory monitoring—were automated using Salesforce tools such as Record-Triggered Flows, Scheduled Flows, Email Alerts, and Apex programming.

To uphold data integrity and secure access, validation rules and a role-based access control model were implemented, enabling clear data visibility and governance for teams across Sales, Inventory, and Marketing. Additionally, an Apex batch job was scheduled to regularly check and update low-stock inventory levels.

By harnessing the power of Salesforce, this solution elevates the customer experience with personalized interactions and boosts operational efficiency through intelligent automation. It delivers a scalable, future-ready platform aligned with the growth trajectory and evolving demands of HandsMen Threads.

Objective

The goal of this project is to design and implement a tailored Salesforce CRM solution for HandsMen Threads, aimed at optimizing core business processes, ensuring data integrity, and enhancing overall customer satisfaction.

By centralizing the management of Customers, Orders, Products, Inventory, and Marketing Campaigns, the project seeks to:

- Automate essential operations such as order confirmations, loyalty status updates, and inventory alerts
- Enforce data accuracy and consistency through robust validation rules
- Provide real-time insights into inventory status and customer engagement
- Enhance cross-functional collaboration with role-based access controls for Sales, Inventory, and Marketing teams
- Enable personalized customer experiences via targeted communications and loyalty initiatives

This objective lays the groundwork for a streamlined, scalable, and customer-focused CRM platform that will support the continued growth and evolving needs of HandsMen Threads.

Technology Description

Salesforce

Salesforce is a leading cloud-based Customer Relationship Management (CRM) platform that enables businesses to manage customer data, streamline workflows, and enhance operations across sales, service, and marketing. It supports both declarative (point-and-click) tools and programmatic development using Apex and Flows, allowing for highly customized business solutions.

Key Salesforce Components Used

Custom Objects

Custom Objects function like database tables within Salesforce and are designed to store data specific to business needs.

Examples:

- Customer__c – Stores customer details
- Product__c – Contains product information
- Order__c – Records customer orders

Tabs

Tabs allow users to easily navigate and manage records related to specific objects in the Salesforce interface.

Example:

- The Product__c tab lets users view and update product entries.

Custom App

A Custom App is a group of related tabs and functions packaged together for a particular business purpose, improving user navigation and productivity.

Profiles

Profiles control what users can access, create, edit, or delete in Salesforce. They manage permissions at the object, field, and system level to enforce security and data governance.

Roles

Roles define hierarchical data visibility in Salesforce. They help control access to records across teams while supporting reporting structures and record-level sharing.

Permission Sets

Permission Sets provide additional access to users without altering their main profile. This allows for flexible, role-specific access across teams.

Validation Rules

Validation Rules help maintain data integrity by enforcing business logic during data entry.

Examples:

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

Email Templates

Email Templates ensure consistent and professional communication with customers.

Example:

- An “Order Confirmation” template is used to notify customers after a successful purchase.

Email Alerts

Email Alerts are automated actions triggered by workflows or flows to send emails based on defined conditions.

Example:

- Notify a customer when their loyalty level changes.

Flows

Flows are automation tools that handle logic such as creating, updating, or deleting records, sending notifications, and more—all without writing code.

Example:

- A Record-Triggered Flow sends an email notification when a new order is placed.

Apex

Apex is Salesforce’s object-oriented programming language used for implementing advanced custom logic and automations beyond declarative tools.

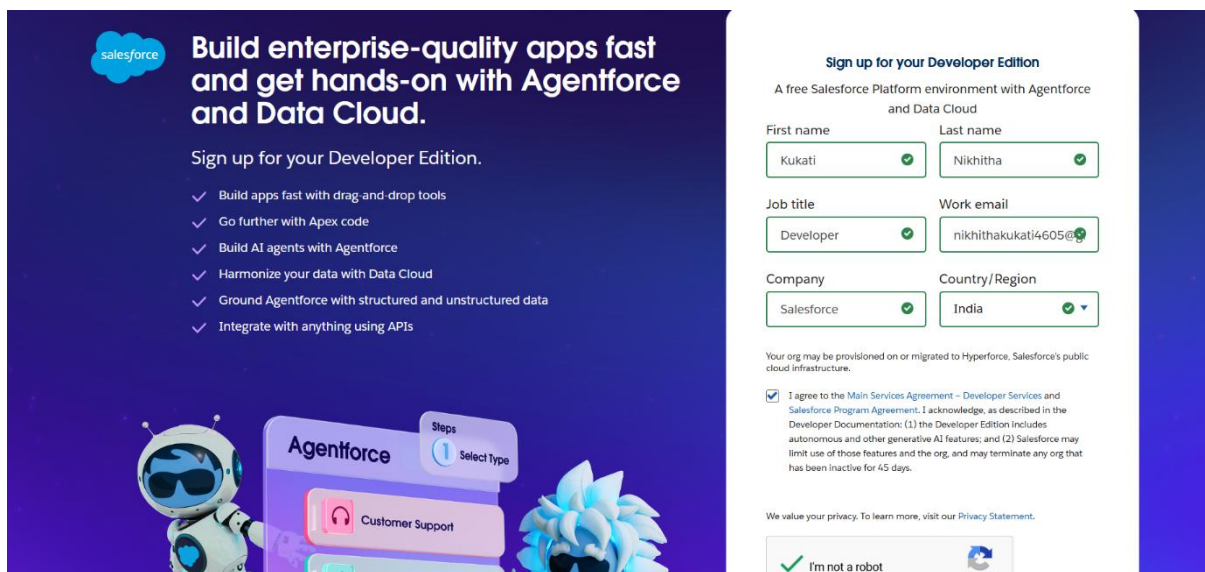
Example Use Cases:

- A trigger to update Total_Amount__c on the Order__c object
- A trigger to decrease product stock after an order confirmation

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, the **password was set**, and access was granted to the **Salesforce Setup** page.



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First name: Kukati ✓ Last name: Nikhitha ✓

Job title: Developer ✓ Work email: nikhithakukati4605@gmail.com ✓

Company: Salesforce ✓ Country/Region: India ✓

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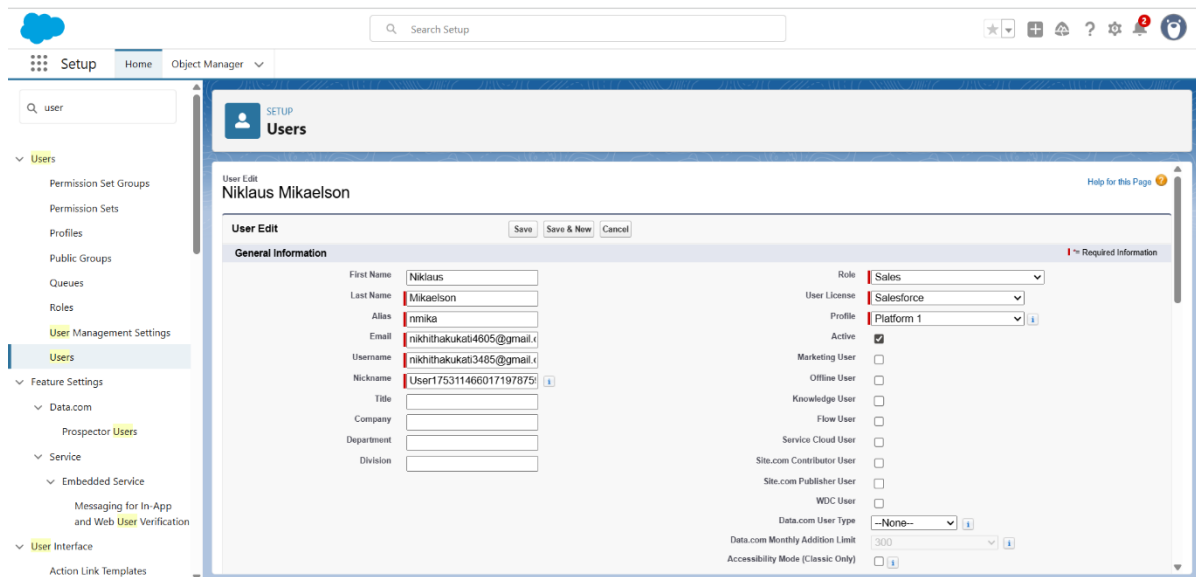
2. Custom Object Creation

Five **custom objects** were created to manage essential business data:

- **HandsMen Customer** – Stores customer details like **email**, **phone number**, and **loyalty status**
- **HandsMen Product** – Stores product information such as **SKU**, **price**, and **available stock**
- **HandsMen Order** – Captures order data including **ordered quantity** and **status**
- **Inventory** – Tracks **stock levels** and **warehouse location**
- **Marketing Campaign** – Maintains records of **promotional campaigns** and their **schedules**

Steps followed:

- Navigated to **Setup → Object Manager → Create → Custom Object**
- Provided **label**, **object name**, and enabled **reporting** and **search**
- Created **tabs** for each custom object



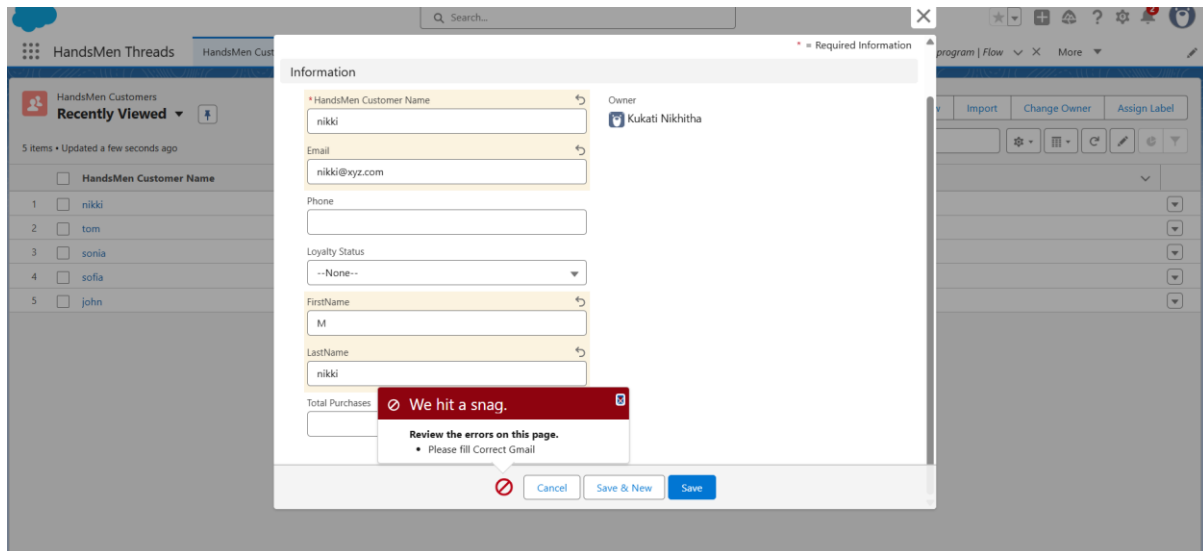
3. Creating the Lightning App

- A custom **Lightning App** named **HandsMen Threads** was created
- Included tabs: **HandsMen Customer, Order, Product, Inventory, Campaign, Reports,** and more
- The app was assigned to the **System Administrator** profile

4. Validation Rules

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

- **Order Object:** Prevent saving if $\text{Total_Amount_c} \leq 0$
Error Message: "Please Enter Correct Amount"
- **Customer Object:** Ensures the email contains @gmail.com
Error Message: "Please fill Correct Gmail"



5. User Role & Profile Setup

- Cloned the **Standard User** profile to a new one named **Platform I**, and provided access to the required custom objects
- Created **roles** for different departments:
 - **Sales Manager**
 - **Inventory Manager**
 - **Marketing Team**

6. User Creation

Users were added and assigned **roles and profiles** based on their responsibilities:

- **Niklaus Mikaelson** – Assigned the **Sales** role
- **Kol Mikaelson** – Assigned the **Inventory** role

These role-based assignments ensured **controlled access** to relevant data and processes.

Search Setup

Setup Home Object Manager

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

SETUP Users

User Edit Niklaus Mikaelson

Help for this Page

User Edit Save Save & New Cancel

General Information

First Name Niklaus

Last Name Mikaelson

Alias nmika

Email nikhihakukati4805@gmail.com

Username nikhihakukati3485@gmail.com

Nickname User175311466017197875

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

Accessibility Mode (Classic Only) ☐

7. Email Templates & Alerts

Three **email templates** were created for automated notifications:

- **Order Confirmation** – Triggered when **order status = Confirmed**
- **Low Stock Alert** – Triggered when **inventory drops below 5 units**
- **Loyalty Program Email** – Triggered when **customer loyalty status changes**

Corresponding **Email Alerts** were configured and integrated into **automation flows**.

Search Setup

Setup Home Object Manager

email

Email

Apex Exception Email

Authorized Email Domains

Classic Email Templates

Classic Letterheads

Compliance BCC Email

DKIM Keys

Delete Attachments Sent as Links

Deliverability

Email Address Internationalization

Email Attachments

Email Delivery Settings

Email Domain Filters

Email Relays

Email Footers

Email to Salesforce

SETUP Classic Email Templates

Email Template Send Test and Verify Merge Fields

Subject Your Order has been Confirmed

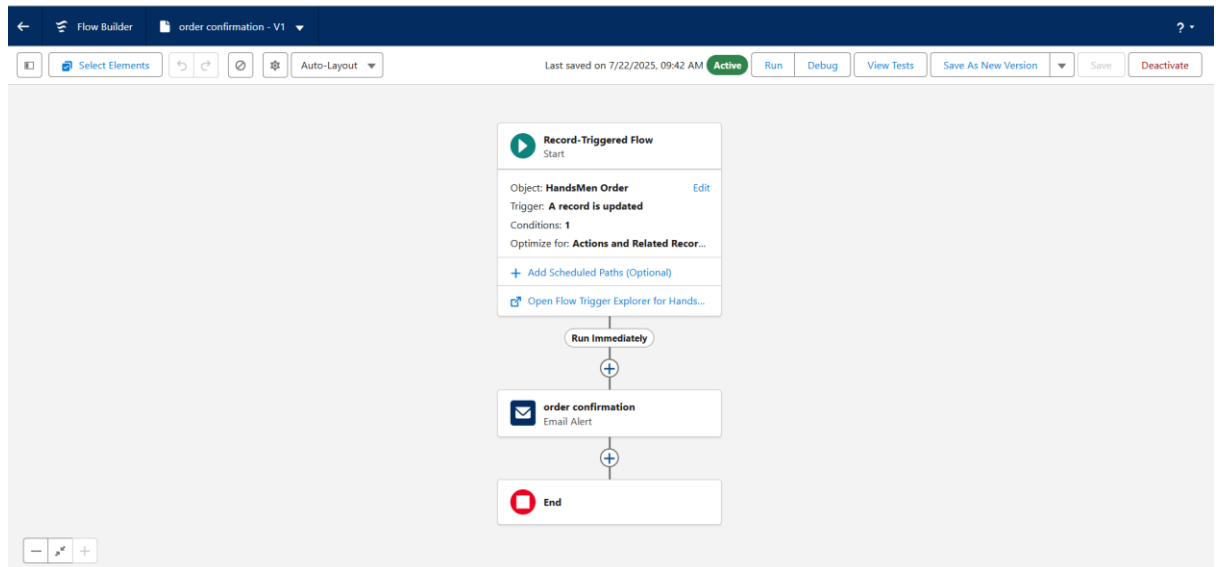
HTML Preview

Dear {!HandsMen_Order__c.HandsMen_Customer__c},
Your order #{!HandsMen_Order__c.Name} has been confirmed!
Thank you for shopping with us.
Best Regards,
Sales Team

8. Flow Implementations

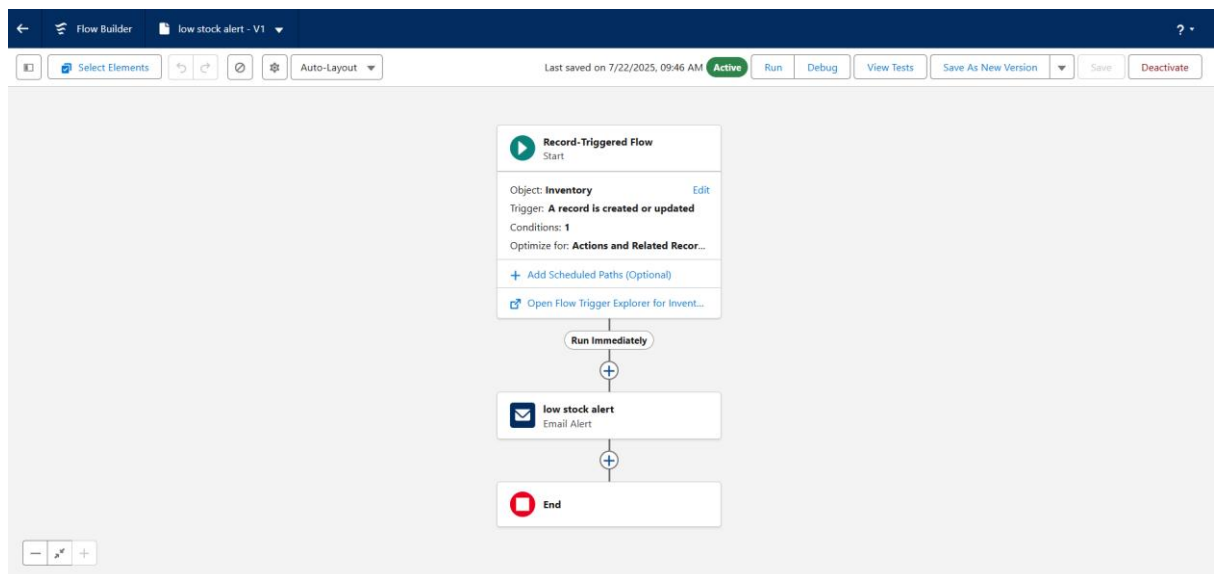
a. Order Confirmation Flow

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



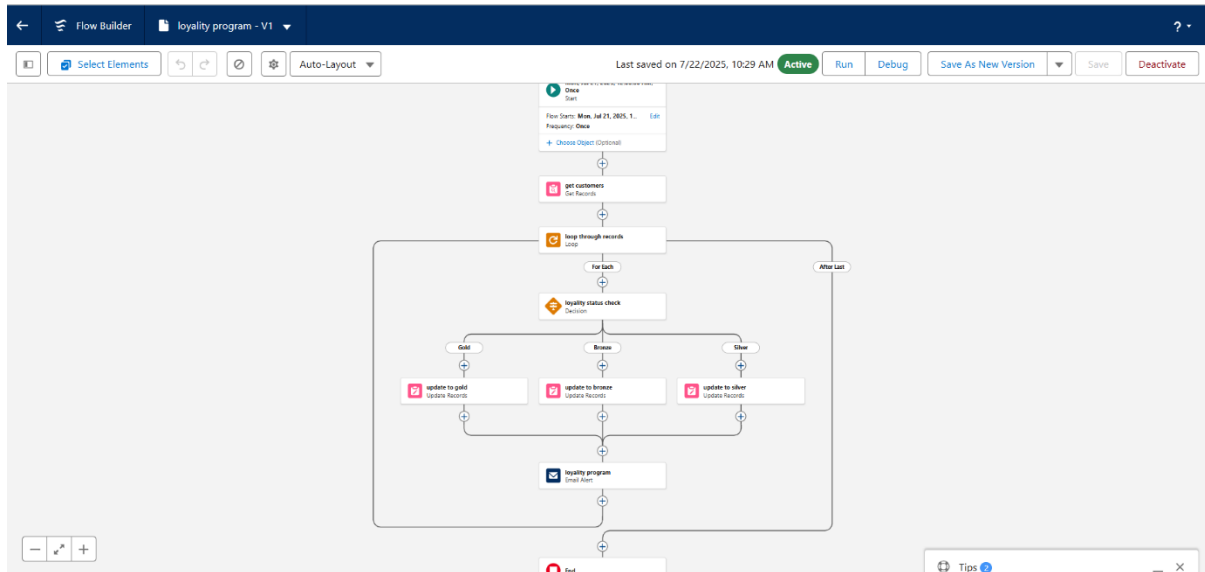
b. Stock Alert Flow

- Triggered when **inventory stock < 5**
- Sends a **Low Stock Alert Email** to the Inventory Manager



c. Scheduled Flow: Loyalty Update

- Runs **daily at midnight**
- Iterates through customers and **updates Loyalty Status** based on total purchases



9. Apex Triggers

- **Order Total Trigger:** Automatically calculates `Total_Amount__c` based on **order quantity** and **unit price**
- **Stock Deduction Trigger:** Deducts product stock when an **order is placed**
- **Loyalty Status Trigger:** Updates the **customer's Loyalty Status** based on **cumulative purchases**

Project Explanation with Real-World Example

Let's walk through the system using a real-world scenario to demonstrate how the Salesforce CRM works for **HandsMen Threads**.

1. Customer Registration

A customer named **Prabha** visits the HandsMen Threads store or browses the website.

- In **Salesforce**: A new record is created in the **Customer__c** object containing his **name**, **phone number**, and **email address**.
- **Validation Rule**: Ensures that the **email format is valid**, e.g., must contain @gmail.com.

2. Product Setup

The admin adds new products like **Formal Shirts**, **Trousers**, and **Blazers** into the **Product__c** object.

- Each product includes details such as **SKU**, **price**, and **stock quantity**.
- Corresponding **Inventory__c** records are created to track product availability.

3. Order Placement

Nikki decides to purchase **3 T Shirts**, each priced at **₹30**.

- In **Salesforce**: A new record is created in the **Order__c** object capturing product quantity and customer details.
- **Apex Trigger**: Automatically calculates the **Total_Amount__c** as $3 \times ₹30 = ₹90$.

4. Inventory Update

As soon as the order is placed:

- An **Apex Trigger** on the **Inventory__c** object **reduces the stock** of T Shirts by 3 units.
- A **Validation Rule** ensures that **stock never drops below 0**, preventing over-selling.

5. Loyalty Program

Nikki's total purchase value is now **₹90**.

- An **Apex Trigger** checks his **cumulative purchases** and updates his **Loyalty_Status__c** in the **Customer__c** record.
- Based on the logic:
 - $< ₹500 \rightarrow$ **Bronze**
 - $₹500 - ₹1000 \rightarrow$ **Silver**
 - $> ₹1000 \rightarrow$ **Gold**

Since Nikki has spent ₹90, he is promoted to **Bronze** membership.

6. Email Notifications

Whenever a new order is placed or a customer's loyalty status is updated:

- A **Flow** is triggered, followed by an **Email Alert**.
- Nikki receives an email:
*"Thank you for your purchase! Your loyalty status has been upgraded to **Bronze**."*

7. Users and Roles

Salesforce users are created for internal staff with appropriate roles and profiles.

- **Ravi Sharma** – Assigned the **Sales Role** with the **Platform 1 Profile**
- **Neha Kapoor** – Assigned the **Inventory Role** with the **Platform 1 Profile**

These role-based assignments ensure that each team member can access only the data relevant to their responsibilities.

Screenshots

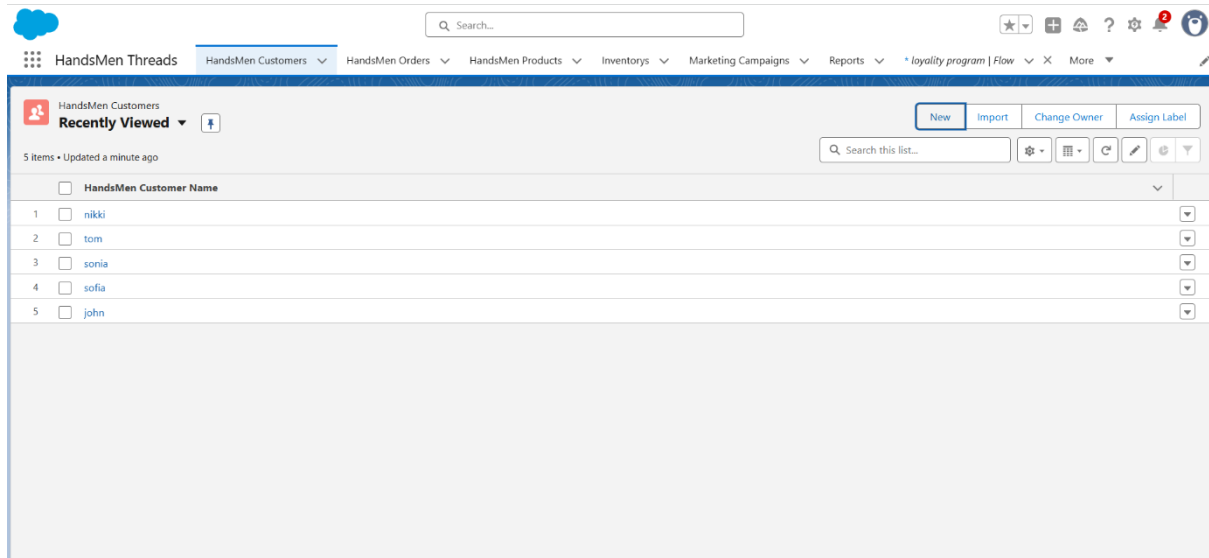


Fig : Custom App for HandsMen Threads

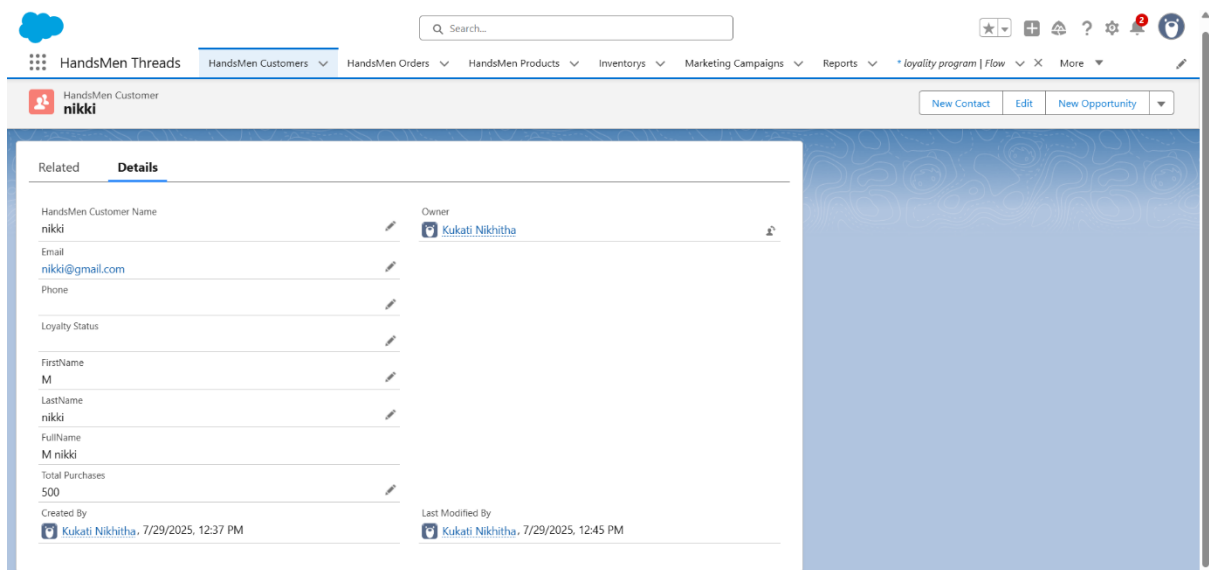


Fig: Customer Creation in HandsMen Threads

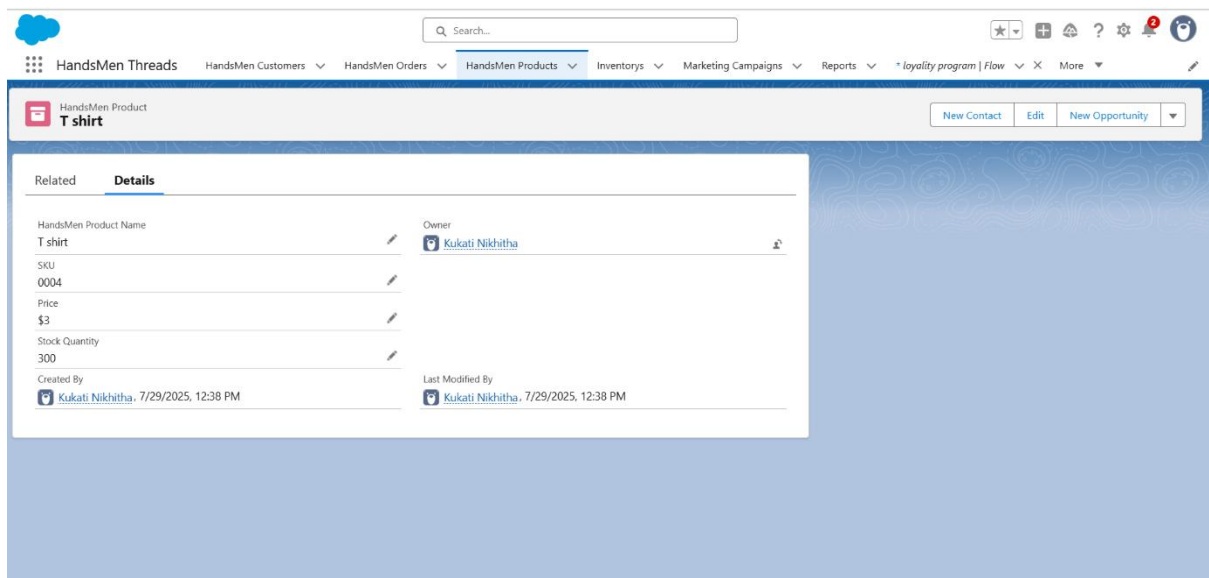


Fig : Products in HandsMen Threads

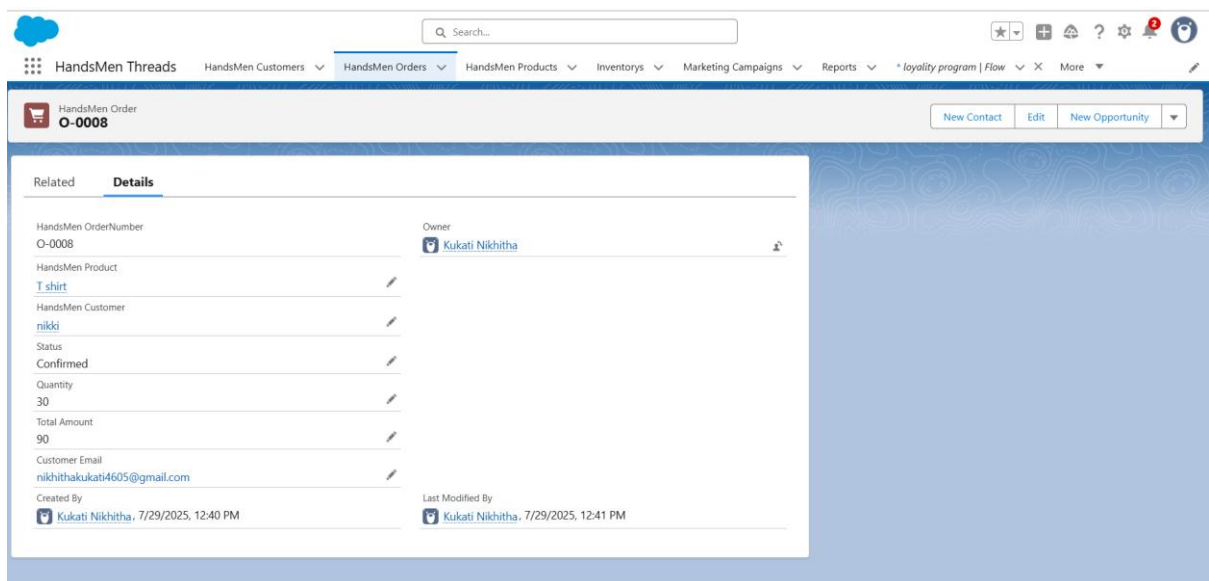


Fig : Order Confirmation

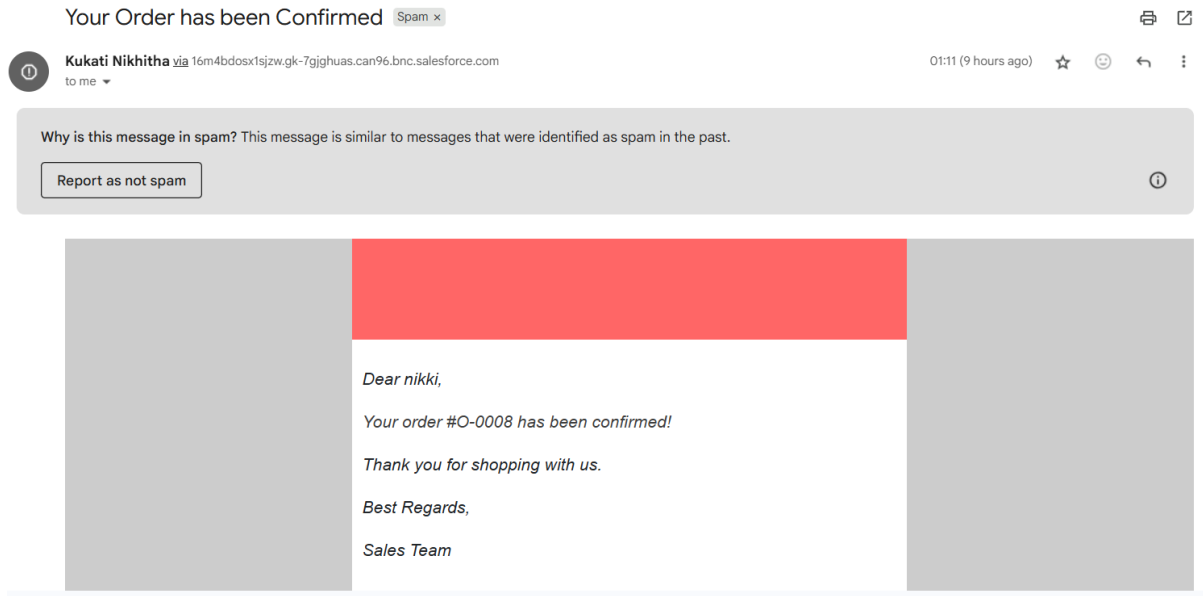


Fig : Order Confirmation Email

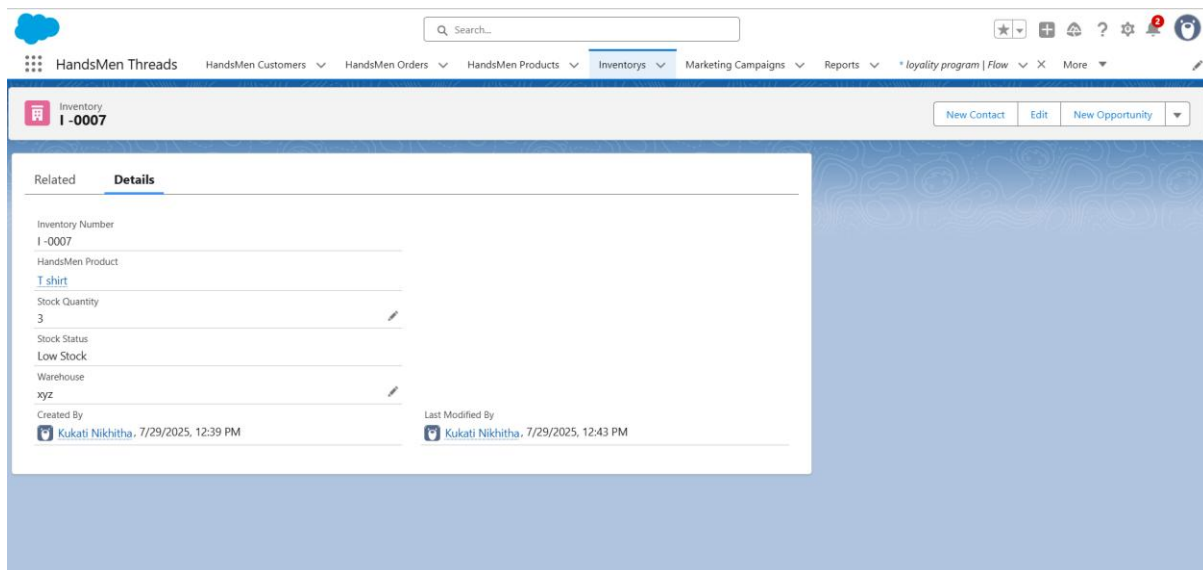


Fig : Inventory Creation

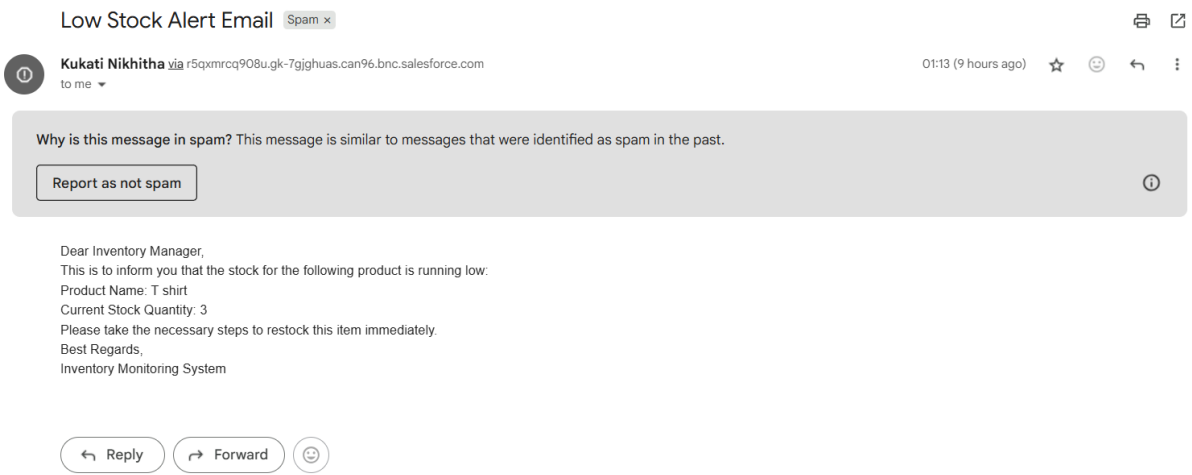


Fig: Low Stock Alert Email

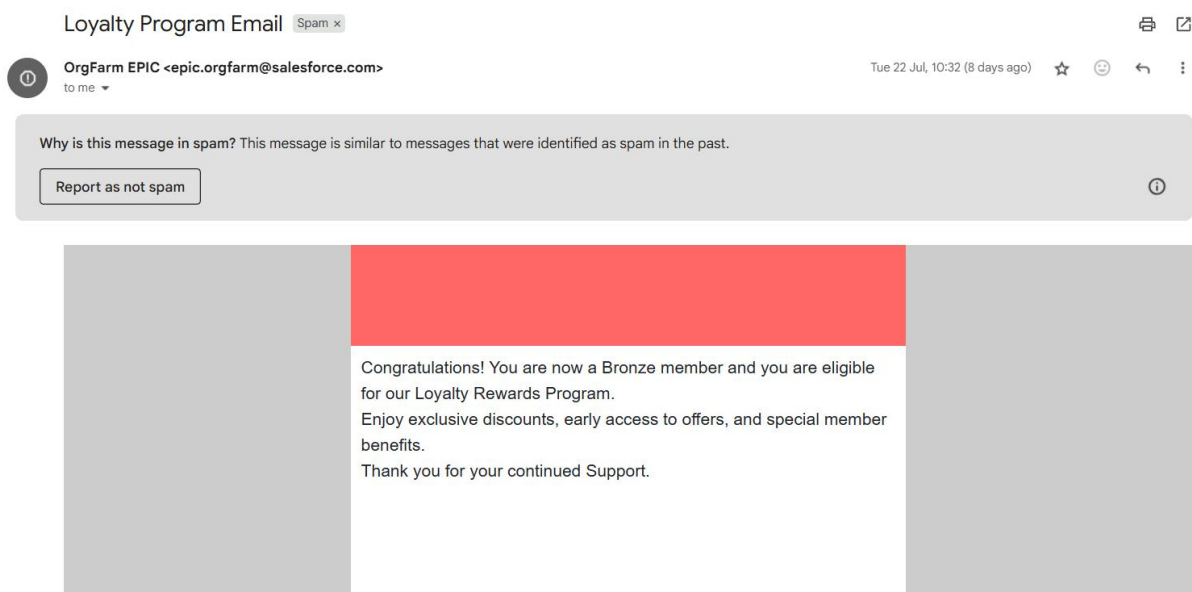


Fig: Loyalty Program Email

Conclusion

The Salesforce-based **CRM system for HandsMen Threads** has been successfully implemented to streamline core business operations such as **customer management, product cataloging, order processing, inventory tracking, and loyalty program automation**. By utilizing powerful Salesforce features like **Custom Objects, Flows, Validation Rules, Email Alerts, and Apex**, the solution ensures:

- **Accurate data entry**
- **Real-time process automation**
- **An improved and personalized customer experience**

The platform also introduces **role-based access control** to enhance **data security** and **team collaboration**, while minimizing **manual errors** and boosting **operational efficiency**. Overall, the system provides a **scalable foundation** for future growth, along with better visibility into **sales performance** and **stock levels**.

Future Scope

To expand and enhance the capabilities of the system, the following features can be considered:

1. **Customer Portal Integration**
 - Develop a **Customer Community Portal** where customers can **log in, view their orders, and track loyalty status**.
2. **Mobile App with Salesforce Mobile SDK**
 - Allow **store staff** to manage **inventory** and **orders** using a dedicated **mobile interface**, improving on-the-go accessibility.
3. **Reports & Dashboards**
 - Build **interactive dashboards** and **custom reports** to monitor **sales trends, stock levels, and campaign performance** in real-time.
4. **AI-Powered Recommendations (Salesforce Einstein)**
 - Leverage **Salesforce Einstein** to offer **personalized product suggestions** based on **purchase history** and customer preferences.
5. **WhatsApp/SMS Integration**
 - Integrate **WhatsApp or SMS services** to send customers real-time **order confirmations, stock alerts, and loyalty updates**.