

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

## ABSTRACT

This project presents the implementation of a customized Salesforce CRM solution for HandsMen Threads, a premium men's fashion and tailoring brand. The objective was to streamline business operations, enhance customer engagement, and maintain data integrity across departments.

The solution involves designing a robust data model featuring five key custom objects: Customer, Order, Product, Inventory, and Marketing Campaign. Business processes were automated using Record-Triggered Flows, Scheduled Flows, Email Alerts, and Apex to handle order confirmations, Loyalty status updates, and proactive stock alerts.

To ensure clean and reliable data, validation rules were established, and a role-based security model was implemented for the Sales, Inventor, and Marketing teams. The solution also includes a scheduled batch job using Apex to update low stock quantities.

The end-to-end CRM implementation improves customer experience through personalized communication, ensures operational efficiency with automation, and lays a scalable foundation for future business growth using the Salesforce Platform.

## OBJECTIVE

The main objective of this project is to develop and implement a customized Salesforce CRM solution for HandsMen Threads to streamline core business operations, maintain data integrity, and enhance customer satisfaction.

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

- **Automate key processes** such as order confirmations, loyalty status updates, and stock alerts.
- **Ensure accurate and consistent data** entry using validation rules.
- **Enable real-time visibility** of inventory and customer interactions.

- **Improve internal team coordination** through role-based access control.
- **Deliver personalized customer experiences** through targeted communication and loyalty programs.

## **TECHNOLOGY DESCRIPTION**

### **Salesforce:**

Salesforce is a cloud-based Customer Relationship Management (CRM) platform that helps businesses manage customer data, automate processes, and improve service, marketing, and sales operations. It provides point-and-click tools as well as programmatic capabilities (like Apex and Flows) to build custom business solutions.

### **Custom Objects:**

Objects in Salesforce are like tables in a database. Custom Objects are created to store specific data.  
Example:

- Customer\_\_c : Stores customer info
- Product\_\_c : Stores product details
- Order\_\_c : Stores orders

### **Tabs:**

Tabs are used to display object data in the Salesforce UI

Example: A tab for Product\_\_c allows users to easily view and manage products.

### **Custom App:**

An App in Salesforce is a collection of tabs grouped together for a specific business purpose.

### **Profiles:**

Profiles define what a user can see, do, and edit in Salesforce. It controls object permissions, field access, and more.

### **Roles:**

Roles control the data visibility in Salesforce's role hierarchy. It's used for sharing settings and reporting.

### **Permission Sets:**

Permission Sets grant additional permissions to users without changing their profile.

### **Email Alerts:**

Email Alerts are actions in Flows or Workflow Rules that send emails using predefined templates. Example: When a loyalty level changes, an email is sent to the customer.

## Flows:

Flows automate business logic without code. They can create, update, or send notifications.

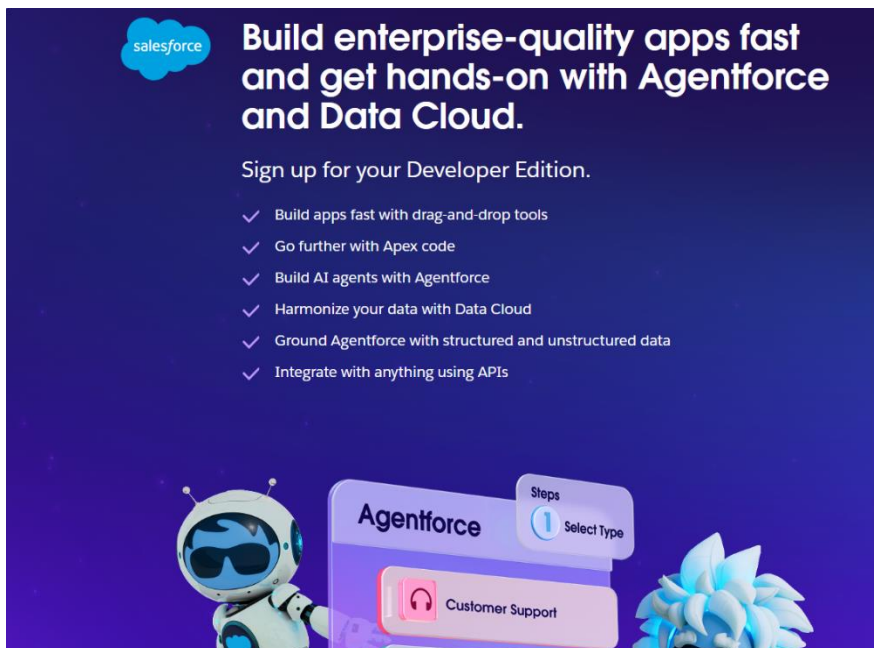
Example:

- Flow triggers email alerts on new order.

## DETAILED EXCECUTION OF PROJECT PHASES:

### 1. Developer Org Setups

- A Salesforce Developer Org was created using <https://developer.salesforce.com/signup>.
- The account was verified, password set, and access was granted to the Salesforce Setup page



**Sign up for your Developer Edition**

A free Salesforce Platform environment with Agentforce and Data Cloud

First name	Last name
<input type="text" value="Naga sai Rishith"/>	<input type="text" value="Bethu"/>

Job title	Work email
<input type="text" value="Student"/>	<input type="text" value="rishith_bethu@srmap"/>

Company	Country/Region
<input type="text" value="SRM University AP"/>	<input type="text" value="India"/>

Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud infrastructure.

☒ I agree to the [Main Services Agreement – Developer Services and Salesforce Program Agreement](#). I acknowledge, as described in the Developer Documentation: (1) the Developer Edition includes autonomous and other generative AI features; and (2) Salesforce may limit use of those features and the org, and may terminate any org that has been inactive for 45 days.

We value your privacy. To learn more, visit our [Privacy Statement](#).

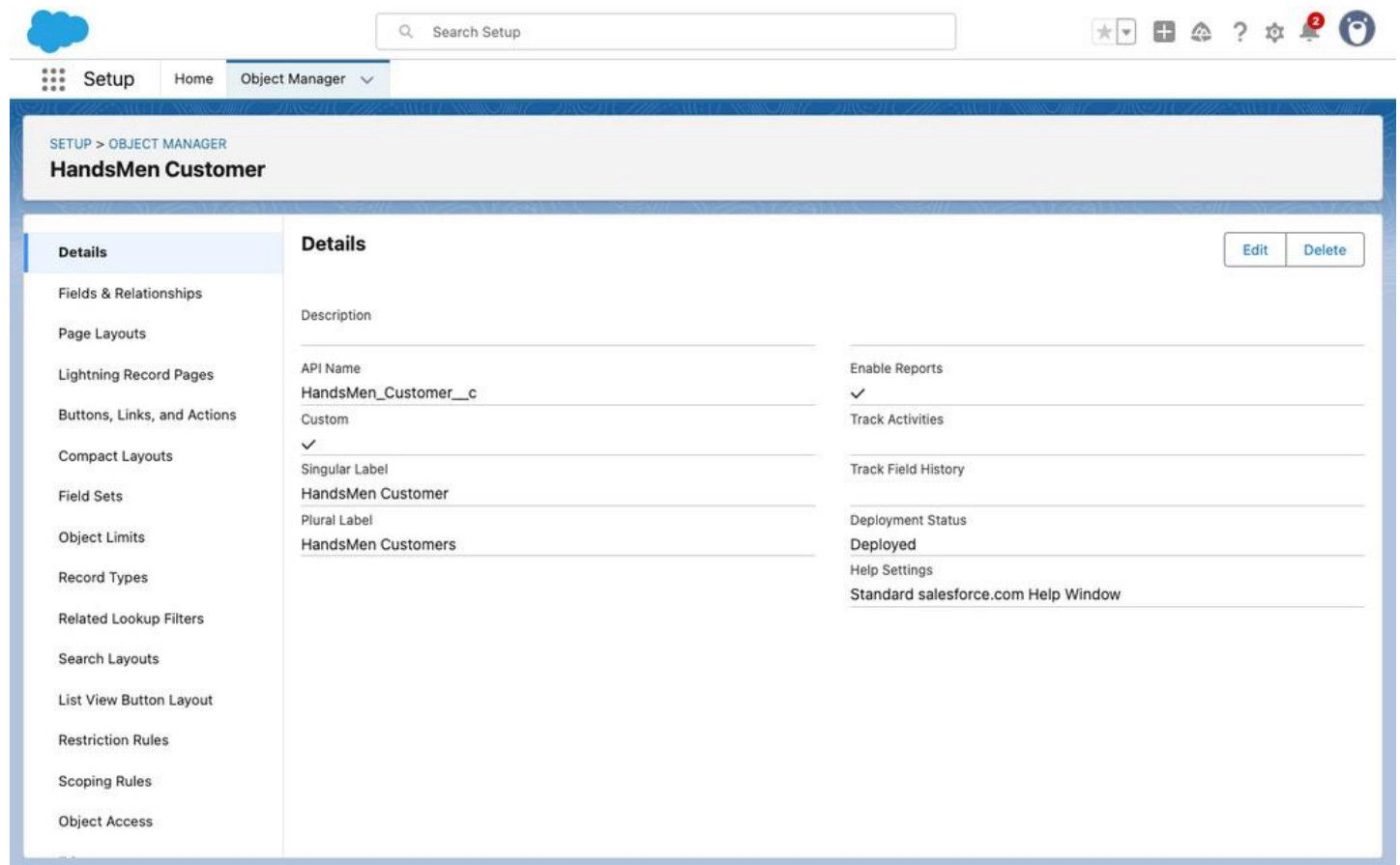
### 2. Custom Object Creation

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

- **HandsMen Customer** - Stores customer info like email, phone, loyalty status..
- **HandsMen Product** - Stores product catalog details like SKU, price and stock.
- **HandsMen Order** - Stores orders placed by customers, 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, name 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, Order, Product, Inventory, Campaign, Reports, etc.
- Assigned to the System Administrator profile.

### 4. Validation Rules

To ensure accurate data entry and enforce business logic, the following validation 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 fill Correct Gmail” .

The screenshot shows a Salesforce interface with a 'New HandsMen Customer' form. The form includes fields for 'HandsMen Customer Name' (Luffy), 'Email' (luffy@56.com), 'Phone', 'Loyalty Status' (set to '--None--'), 'First Name', 'Last Name', and 'Total Purchases'. The 'Owner' is listed as 'Naga sai Rishith Bethu'. A red error message box is displayed over the form, stating 'We hit a snag. Review the errors on this page. Please fill Correct Gmail'. The background shows a sidebar with 'HandsMen Customer' and 'Recently Viewed' sections, and a top navigation bar with 'Marketing Campaigns' and various utility icons.

## 5. User Role & Profile Setup

- Closed the Standard User profile to a new profile named I 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 role-based assignments help enforce proper data access and process control within the system.

The screenshot shows the Salesforce Setup interface for editing a user. The left sidebar contains navigation options: Setup, Home, Object Manager, Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, and User Management Settings. The main content area is titled 'Users' and shows the 'User Edit' form for 'Niklaus Mikaelson'. The form includes fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. The 'Role' dropdown is set to 'Sales'. The 'User License' dropdown is set to 'Salesforce'. The 'Profile' dropdown is set to 'Platform 1'. The 'Active' checkbox is checked. The 'Marketing User' checkbox is unchecked. The 'Offline User' checkbox is unchecked. The 'Knowledge User' checkbox is unchecked. The 'Flow User' checkbox is unchecked. The 'Service Cloud User' checkbox is unchecked. The 'Site.com Contributor User' checkbox is unchecked. The 'Site.com Publisher User' checkbox is unchecked. The 'WDC User' checkbox is unchecked. The 'Data.com User Type' dropdown is set to '--None--'. The 'Data.com Monthly Addition Limit' is set to 300. The 'Accessibility Mode (Classic Only)' checkbox is unchecked. The 'High-Contrast Palette on Charts' checkbox is unchecked. The 'Load Lightning Pages While Scrolling' checkbox is checked. The 'Debug Mode' checkbox is unchecked. The 'Make Setup My Default Landing Page' checkbox is unchecked.

## 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

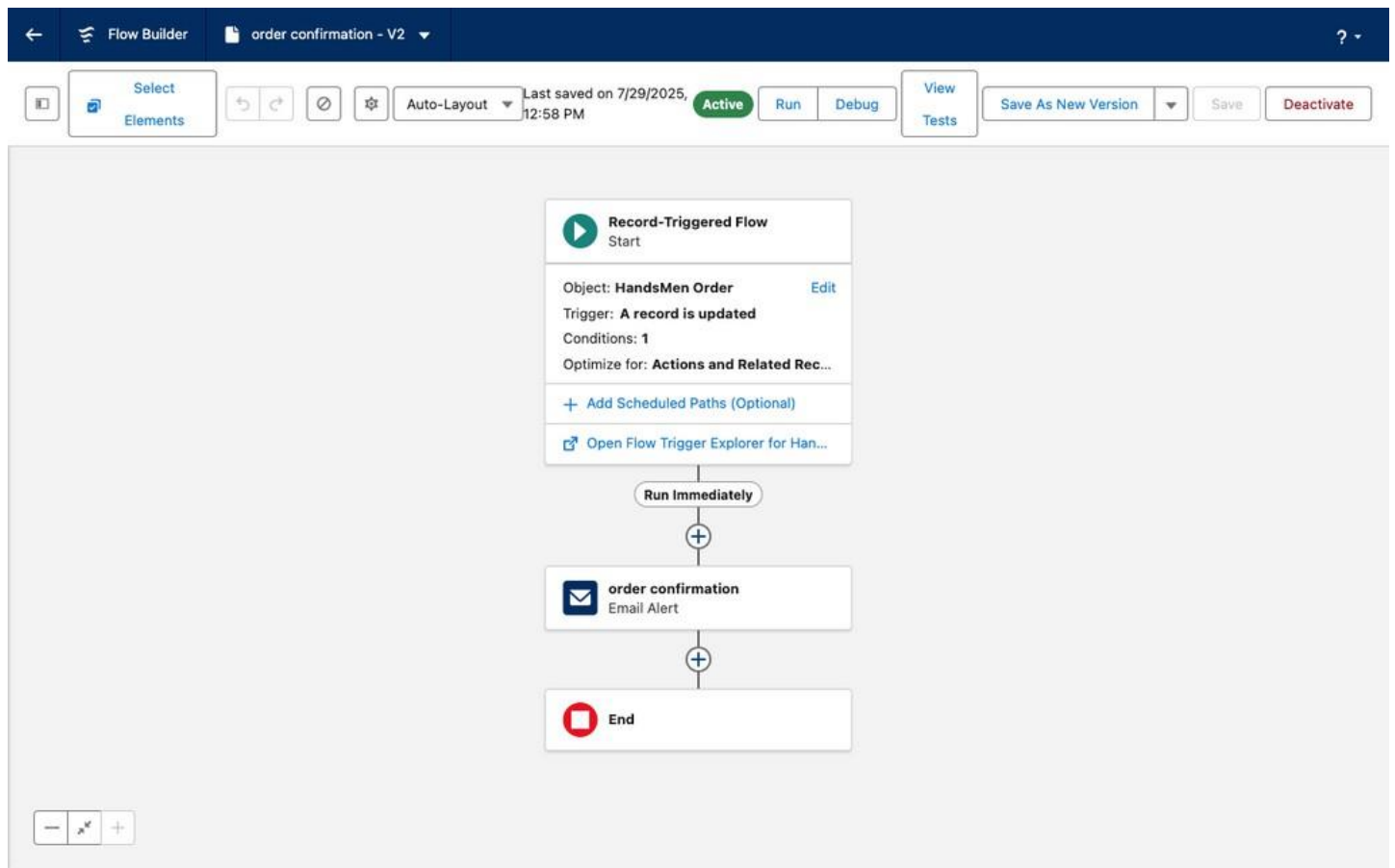
Corresponding Email Alerts were created using templates and linked to automation flows.

The screenshot shows the Salesforce Classic Email Template editor. The top navigation bar includes the Salesforce logo, a search bar labeled "Search Setup", and several utility icons. The left sidebar contains the "Setup" menu with sub-items "Home" and "Object Manager", and a search bar with "email temp". Below the sidebar, the "Email" section is expanded, showing "Classic Email Templates" and "Lightning Email Templates". The main content area is titled "Classic Email Templates" and includes instructions: "Click Preview to see your HTML email template in a separate window." and "If the text version of the template is left blank, this version will be stripped of HTML and sent as the text version." The editor features a "Formatting Controls" toolbar with options for font, size, color, bold, italic, underline, and alignment. Below this is the "Available Merge Fields" section, which includes a "Select Field Type" dropdown (set to "Contact Fields"), a "Select Field" dropdown, and a "Copy Merge Field Value" button. The "HTML Email Content" section has a "Subject" field containing "Your Order has been Confirmed" and a large text area with a red header and a dashed box containing the email body text: "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". A "Save" button is visible at the bottom of the editor.

## 8. Flow Implementation

### a. Order Confirmation Flow

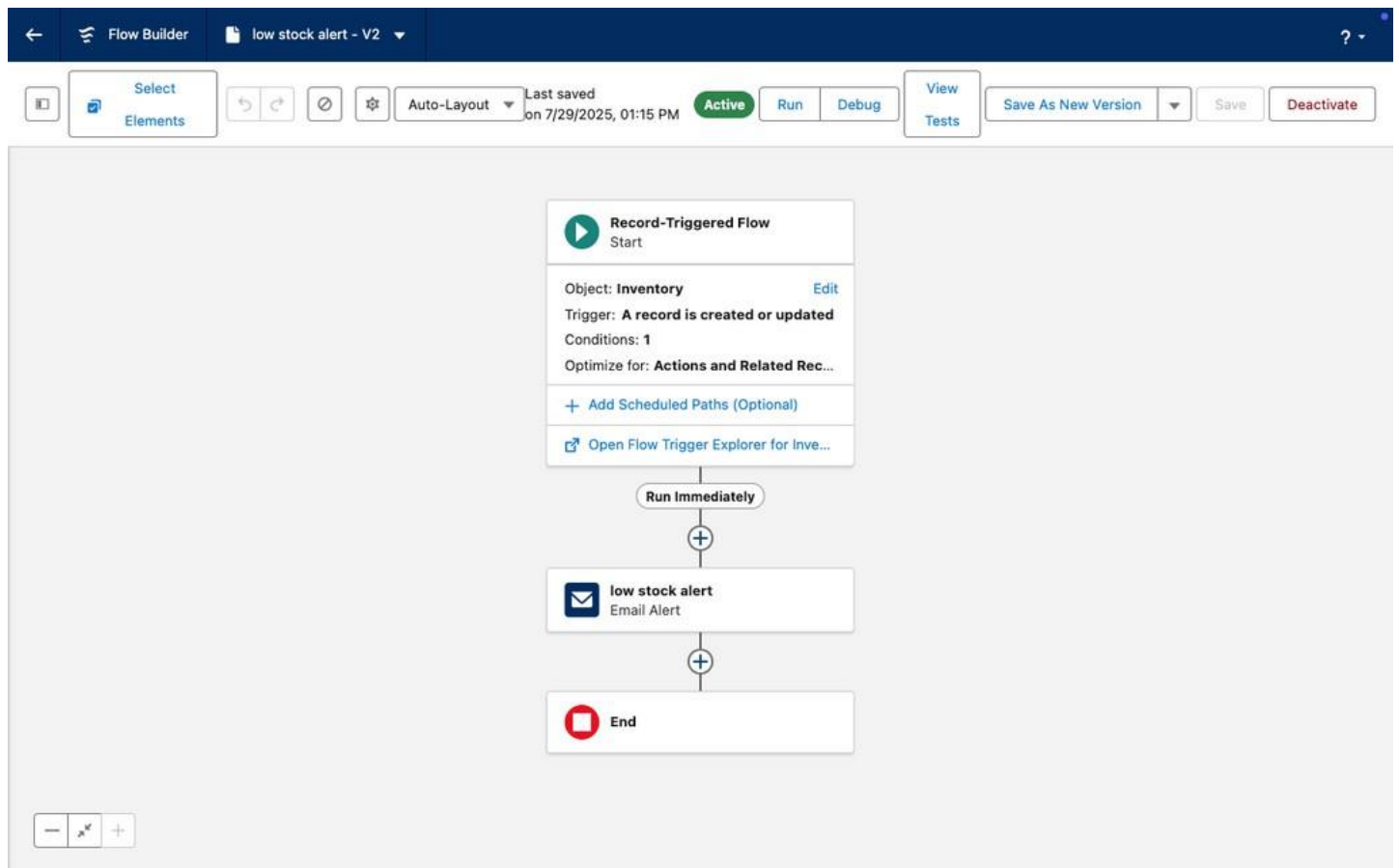
- Triggered when an order is updated to Confirmed.
- Sends an Order Confirmation email to the related customer.



## b. Stock Alert Flow

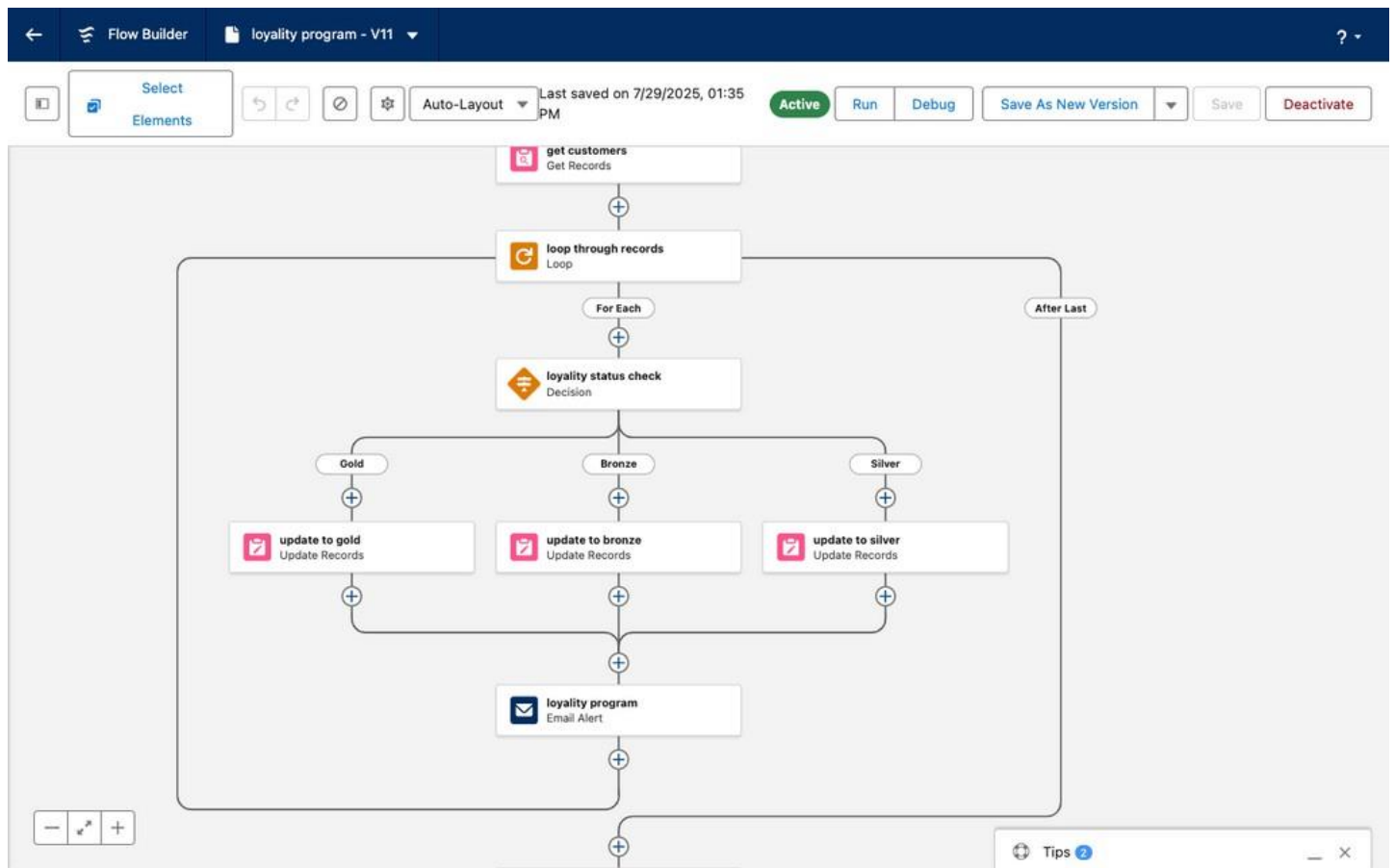
- Triggered when Inventory stock drops below 5.
- Sends Low Stock email to Inventory Manager.





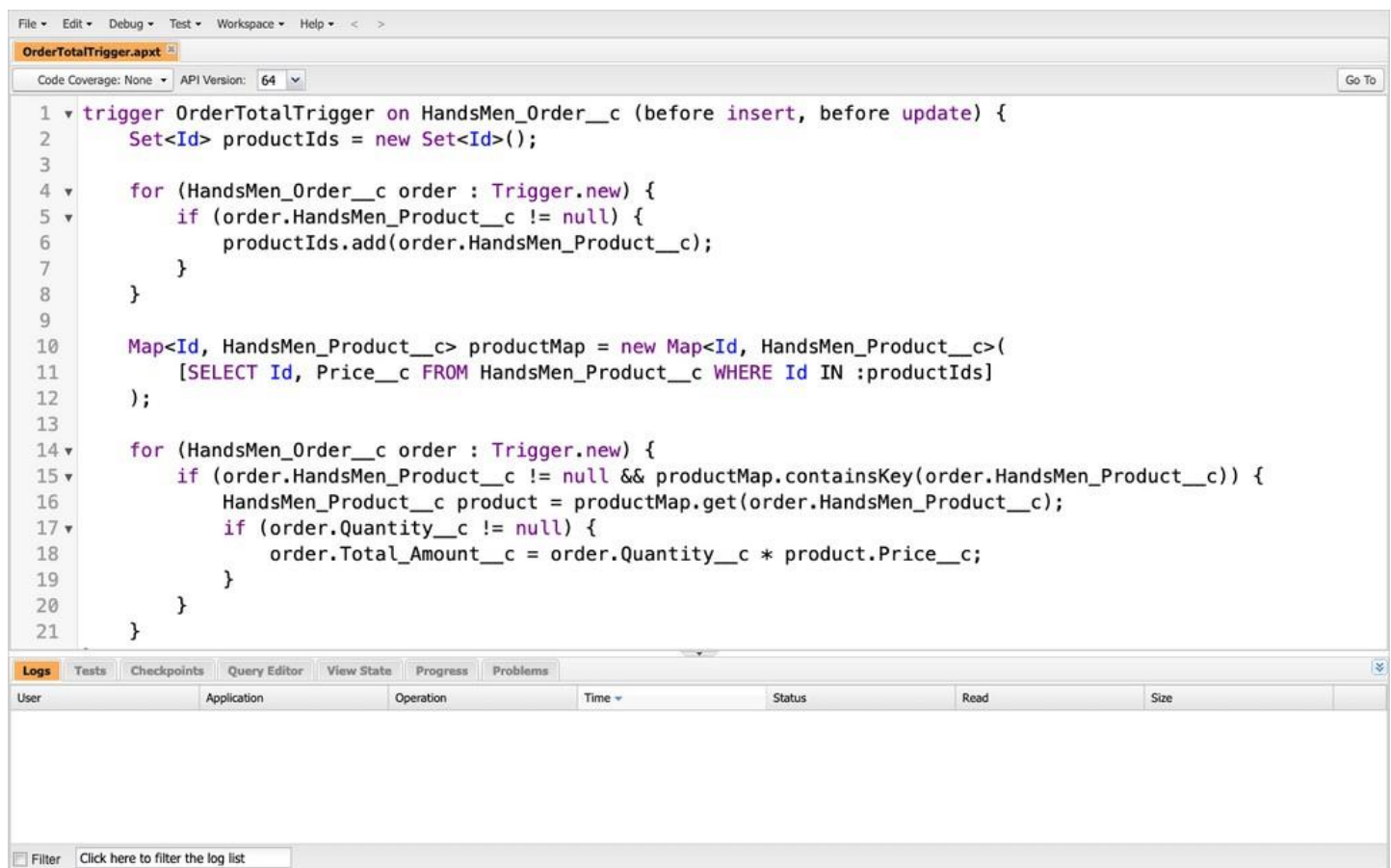
### c. Scheduled Flow: Loyalty Update

- 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 EXAMPLE**

Let's walk through it like a real customer interaction

### **1.Customer Registration**

- A customer, Leo Messi, 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 (eg., 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**

- Leo decides to buy 2 shirts (each \$500) An order is placed.
- In Salesforce: A new Order record is created.
- Apex Trigger: Automatically calculates  $Total\_Amount\_c = 2 \times 500 = \$1000$ .

### **4.Inventory Update**

As soon as the order is placed.

- Apex Trigger on Inventory: Reduces shirt stock by 2.
- Validation Rule: Ensures stock never goes below 0.

## 5. Loyalty Program

- Leo now has a total purchase of \$100
- A trigger on Customer checks his total purchases.

### Based on the value

<\$500 – bronze

\$500-\$1000 – Silver

\$1000 – Gold

- So, Leo becomes a Silver member.

## 6. Email Notifications

- When a new order is placed or loyalty status is updated
- Flow + Email Alert is triggered.
- Leo gets an email:

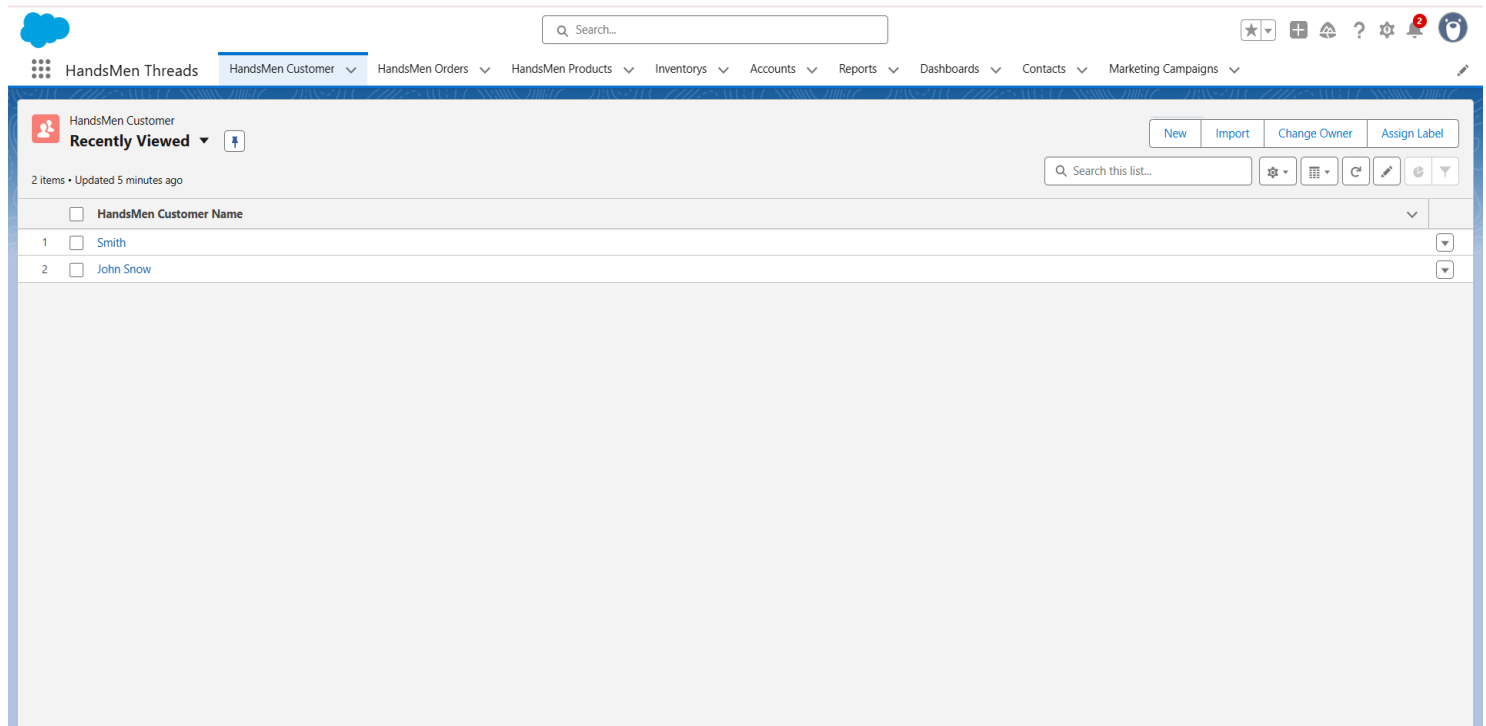
“Thanks for your purchase! Your loyalty status is now Silver”

## 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**

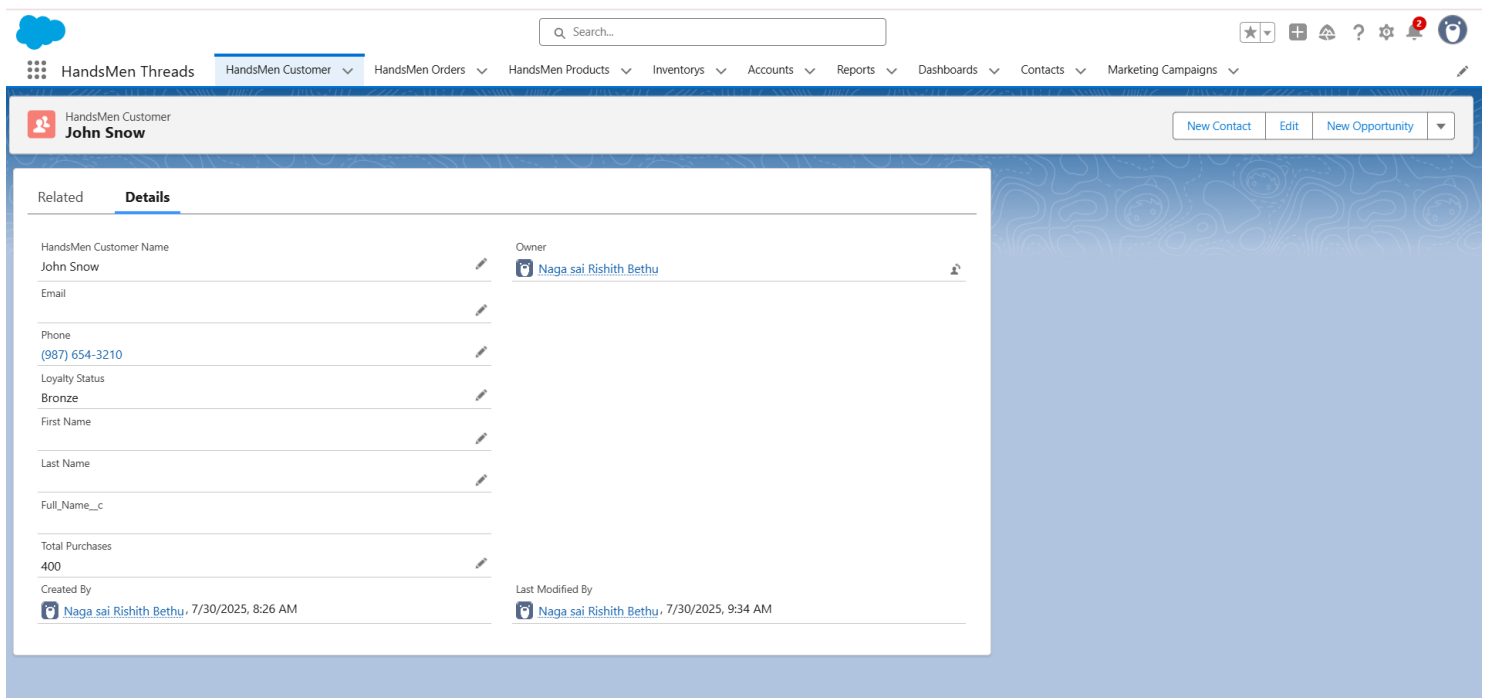


Fig: Customer Creation in HandsMen Threads

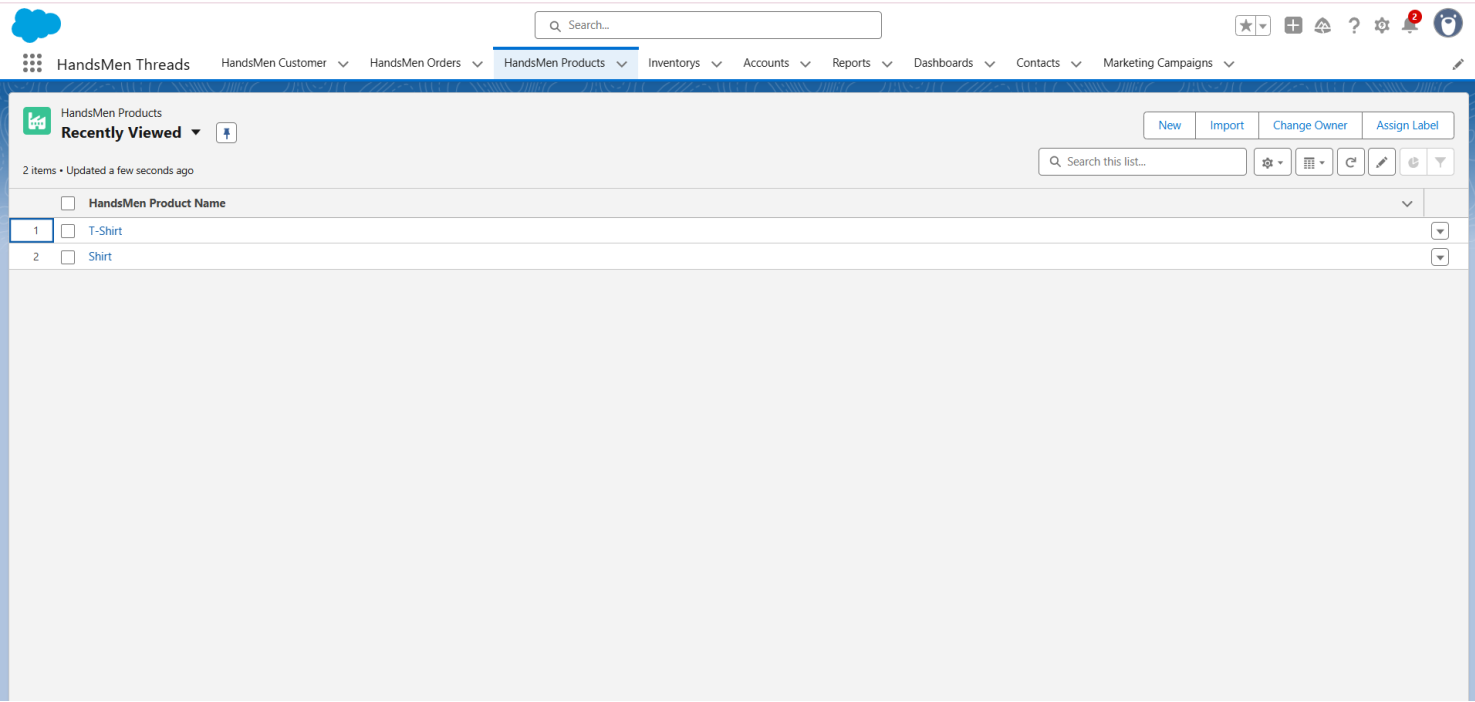


Fig: Products in HandsMen Threads

HandsMen Threads

HandsMen Customer

HandsMen Orders

HandsMen Products

Inventories

Accounts

Reports

Dashboards

Contacts

Marketing Campaigns

HandsMen Order

O-0002

New Contact

Edit

New Opportunity

Related

Details

HandsMen Order Number

O-0002

Owner

Naga sai Rishith Bethu

Customer

John Snow

Status

Confirmed

Quantity

2

Total Amount

1,000

Customer Email

rishith240@gmail.com

HandsMen Product

Shirt

Created By

Naga sai Rishith Bethu

7/30/2025, 8:28 AM

Last Modified By

Naga sai Rishith Bethu

7/30/2025, 9:44 AM

Fig: Order Confirmation

HandsMen Threads

HandsMen Customer

HandsMen Orders

HandsMen Products

Inventories

Accounts

Reports

Dashboards

Contacts

Marketing Campaigns

Inventories

Recently Viewed

2 items • Updated a few seconds ago

Inventory Number

1

I-0002

2

I-0001

New Inventory

\* = Required Information

Information

Inventory Number

\*Product

Search HandsMen Products...

Complete this field.

Stock Quantity

Warehouse

Cancel

Save & New

Save

Fig: Inventory Creation

## **CONCLUSION**

The HandsMen Threads CRM system built on Salesforce successfully streamlines key business processes like customer management, product cataloging, order processing, inventory tracking and loyalty program automation. By leveraging Salesforce tools like Custom Objects, Flows, Validation Rules, Email Alerts and Apex, the system ensures accurate data entry, real-time updates and enhanced customer experience. Through automation and well-structured user roles, the platform minimizes manual errors, speeds up operations and provides better insights into sales and stock.

### **Future Scope:-**

#### **1.Customer Portal Integration**

- Build a Customer Community Portal where customers can log in, view orders and track loyalty status.

#### **2.Mobile App using Salesforce Mobile SDK**

- Enable store staff to manage inventory and orders on the go using a mobile interface.

#### **3.Reports & Dashboards**

- Create detailed sales and inventory dashboards for management to monitor trends and performance in real-time.

#### **4.AI-Powered Recommendations (Einstein)**

- Use Salesforce Einstein to provide personalized product suggestions based on past purchases.

#### **5.WhatsApp/SMS Integration**

- Notify customers via WhatsApp or SMS about order confirmations and loyalty updates.