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

ABSTRACT

This project presents the development and implementation of a customized Salesforce CRM solution for HandsMen Threads, a premium men's fashion and tailoring brand. The primary objective was to enhance business operations, customer engagement, and data consistency across different business units.

The solution incorporates five core custom objects: Customer, Order, Product, Inventory, and Marketing Campaign. Salesforce automation tools like Record-Triggered Flows, Scheduled Flows, Email Alerts, and Apex Triggers were utilized to automate business functions such as order confirmations, loyalty program updates, and low-stock notifications.

Robust data governance was ensured via validation rules and a role-based access control model tailored for the Sales, Inventory, and Marketing teams. Additionally, a scheduled Apex batch job manages inventory updates proactively.

This end-to-end CRM system significantly improves customer service, operational efficiency, and provides a scalable foundation for future business expansion.

OBJECTIVE

The objective of this project is to design and implement a Salesforce CRM system for HandsMen Threads with the following goals:

- Streamline customer, order, and inventory management.
- Automate processes such as order confirmations, loyalty status updates, and stock alerts.
- Maintain data accuracy and reliability using validation rules.
- Improve team collaboration with role-based access.
- Enhance personalized customer communication and loyalty tracking.

TECHNOLOGY DESCRIPTION

Salesforce CRM:

A cloud-based CRM platform offering declarative (point-and-click) and programmatic tools (Apex, Flows) to manage customer relationships and automate business processes.

Custom Objects:

- Customer__c: Stores customer details
- Product__c: Stores product information
- Order__c: Tracks purchase orders

Tabs:

User interface components to access and manage object data.

Custom App:

A Salesforce app named "HandsMen Threads" aggregates all relevant tabs and objects for centralized access.

Profiles & Roles:

- Profiles define user permissions.
- Roles define data visibility through hierarchy.

Permission Sets:

Used to assign additional permissions beyond those in a user's profile.

Validation Rules:

Ensure correct data entry (e.g., Gmail-only email format, non-negative stock levels).

Email Templates & Alerts:

- Predefined emails for order confirmation, stock alerts, and loyalty status updates.
- Used in Flows and Workflows for automated messaging.

Flows:

- Record-Triggered Flow: Sends confirmation email when an order is confirmed.
- Scheduled Flow: Updates loyalty status at midnight.
- Record-Triggered Flow: Alerts inventory manager if stock < 5.

Apex:

Salesforce's proprietary programming language used for advanced business logic.

Key Apex Triggers:

- **OrderTotalTrigger:** Calculates total order amount automatically.
- **StockUpdateTrigger**: Deducts ordered quantity from inventory.
- **LoyaltyStatusTrigger:** Updates loyalty status based on purchases.
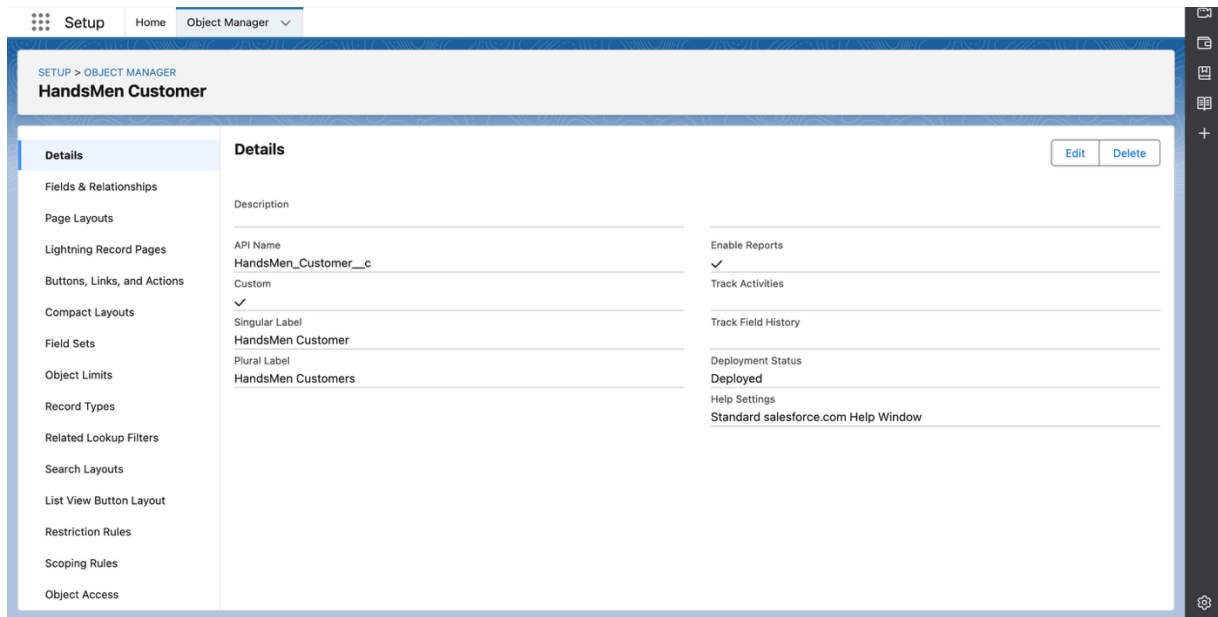
DETAILED EXECUTION

1. **Developer Org Setup**
   - Created Salesforce Developer Org via https://developer.salesforce.com/signup.
   - Setup login credentials and accessed Salesforce setup tools.
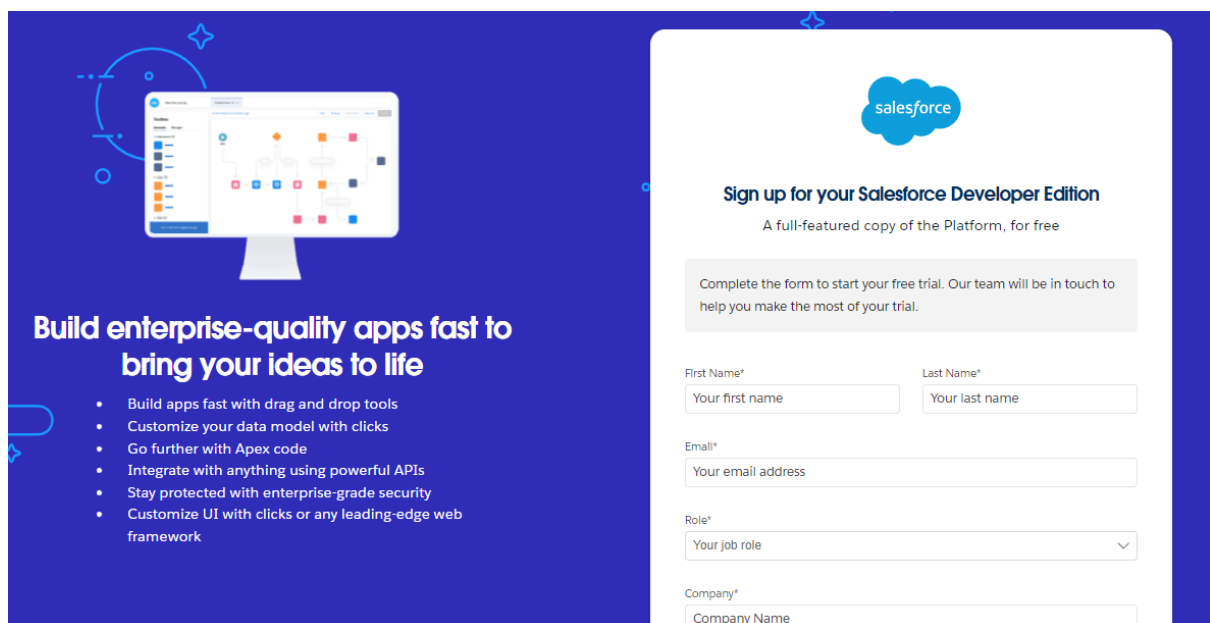
2. **Custom Object Creation**
   - Created five custom objects via Setup > Object Manager.
   - Enabled reporting and created custom tabs for UI access.

3. **Lightning App Creation**
   o Built "HandsMen Threads" app including all relevant custom tabs.

4. **Validation Rules**
   o Order: Prevent saving if Total Amount < 0.
   o Customer: Enforce @gmail.com email format.
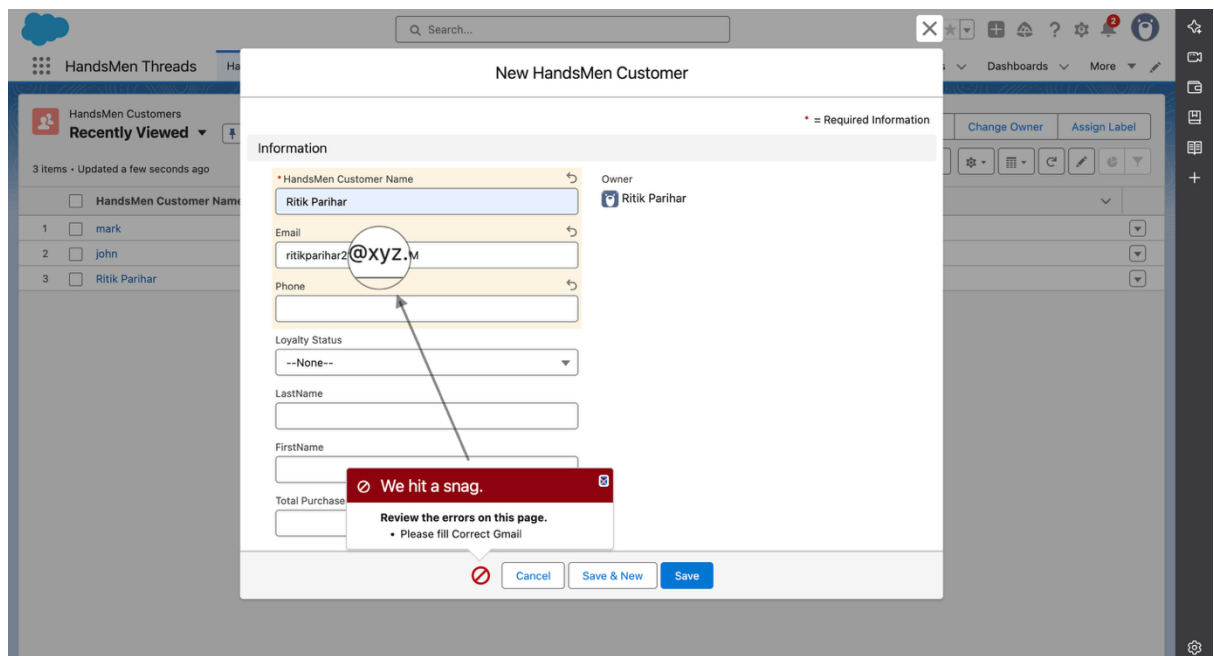
5. **User Role & Profile Configuration**
   o Cloned standard profiles to create custom profiles with object-level permissions.
   o Roles: Sales Manager, Inventory Manager, Marketing Team.

6. User Management

- o Created users with appropriate roles and profiles:
    - ▪ Niklaus Mikaelson (Sales)
    - ▪ Kol Mikaelson (Inventory)

7. Email Templates & Alerts

- o Templates for Order Confirmation, Stock Alert, Loyalty Email.
- o Linked alerts to corresponding Flows.

8. Flow Implementation

- o **Order Confirmation Flow**: Sends email on order status change.

- o **Stock Alert Flow:** Sends email when inventory drops below 5.

- o **Loyalty Flow**: Scheduled flow that updates loyalty status daily.
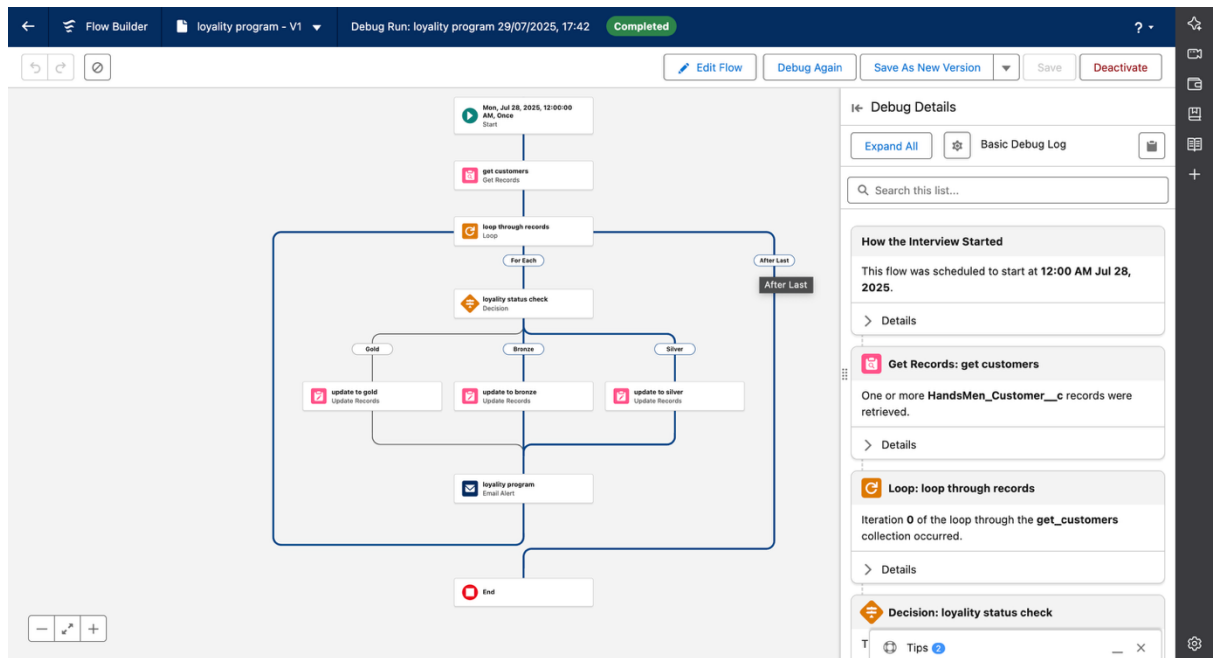
9. Apex Trigger Implementation
- OrderTotalTrigger: Auto-calculates total amount.
- StockUpdateTrigger: Reduces inventory stock post order.
- LoyaltyStatusTrigger: Changes loyalty tier and sends email.

REAL-WORLD EXAMPLE

1. Customer Registration

- Elijah Mikaelson visits the HandsMen Threads website and fills out the registration form.
- His details, including name, phone number, and email (elijah.mikaelson@gmail.com), are captured.
- Validation rule ensures the email follows the "@gmail.com" format.

2. Product & Inventory Setup

- Admin adds new products into the Product__c object, e.g., Classic Blue Shirt (Rs. 500).
- Inventory__c object is updated to reflect 50 units in stock.

3. Order Placement

- Elijah selects 2 Classic Blue Shirts and places an order.
- Apex OrderTotalTrigger calculates total price = Rs. 1000.
- Order__c record is created with status "Confirmed".

4. Inventory Update

- StockUpdateTrigger deducts 2 units from inventory (now 48 units left).
- Inventory__c record automatically updated in real time.

5. Order Confirmation Email

- Record-Triggered Flow sends an order confirmation email to Elijah.
- Email template includes order summary and estimated delivery date.

6. Loyalty Program Update

- At midnight, Scheduled Flow checks Elijah's total purchases.
- His cumulative purchase value qualifies him for "Silver Tier".
- LoyaltyStatusTrigger updates his loyalty status in Customer__c.

7. Marketing Campaign Inclusion

- Based on his purchase behavior, Elijah is auto-enrolled in a Diwali Discount Campaign via a campaign member record.
- He receives a personalized marketing email offering 20% off on next purchase.

CONCLUSION

This Salesforce CRM implementation for HandsMen Threads demonstrates the power of a tailored digital solution in transforming a traditional business. With automation, clean data, real-time visibility, and robust user access controls, the solution delivers measurable value. It equips the business with scalable tools to improve customer satisfaction, enhance operational efficiency, and lay the groundwork for future growth and innovation.