

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, Inventory, and Marketing teams. The solution also includes a scheduled batch job using Apex to update low stock quantities.

This 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 Hands Men 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.

Validation Rules:-

Validation Rules ensure data entered meets business criteria. Example:

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

Email Templates:-

Predefined formats for sending emails to customers or users.

Example:"Order Confirmation" template

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

Apex:-

Apex is Salesforce's object-oriented programming language. It allows developers to write custom logic.

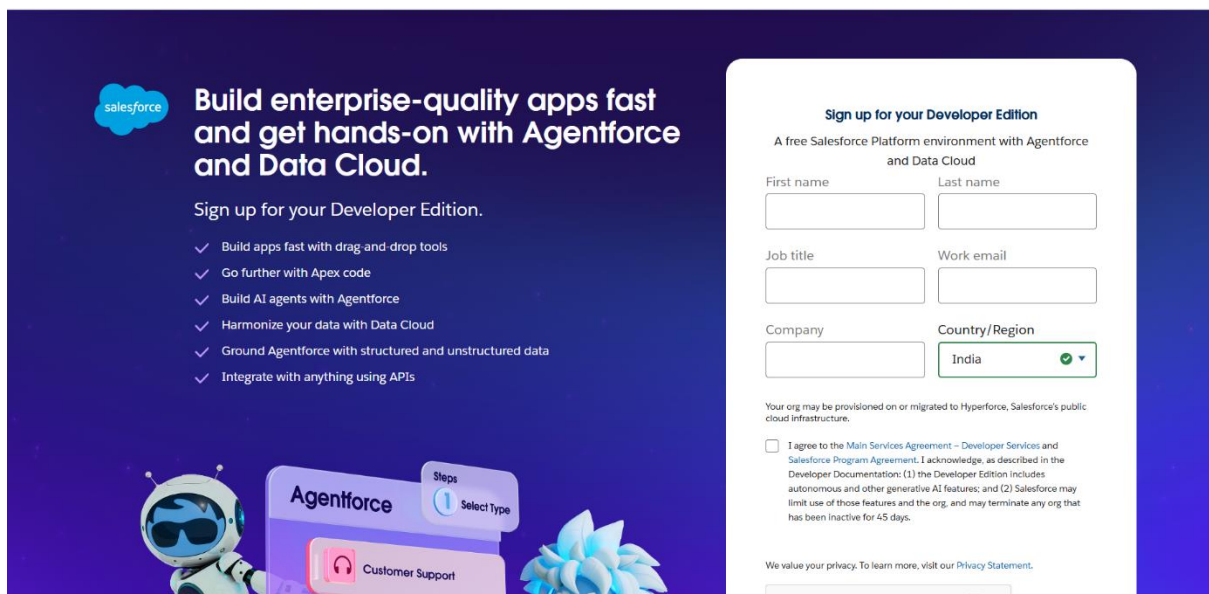
Example Trigger:

- Update Total_Amount__c in orders
- Reduce inventory stock

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



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2. Custom Object Creation

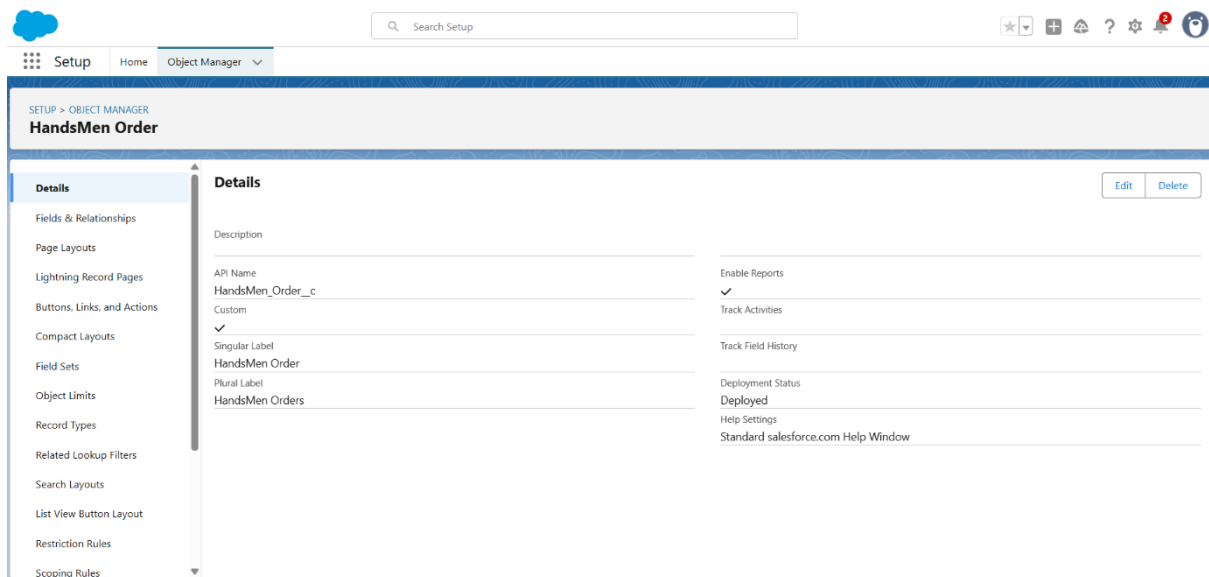
Five custom objects were created to store business-critical data:

- Hands Men Customer - Stores customer info like email, phone, loyalty status.

- Hands Men 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



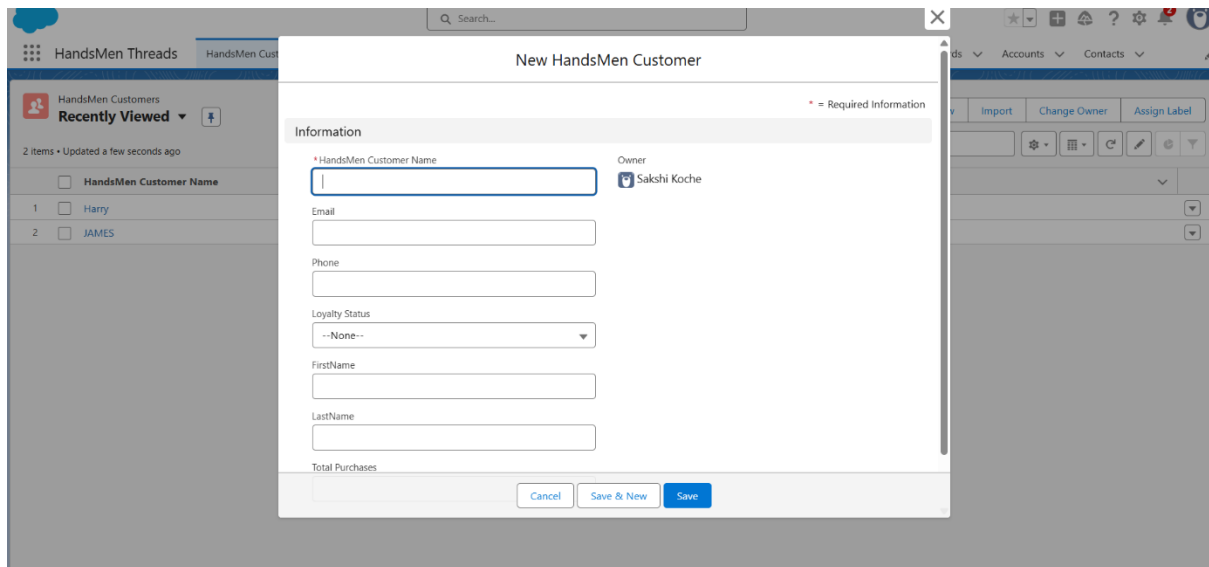
3. Creating the Lightning App

- 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"

A screenshot of the Salesforce 'New HandsMen Customer' form. The form is titled 'New HandsMen Customer' and includes a search bar at the top. On the left, there is a sidebar with 'HandsMen Threads' and 'HandsMen Customers' sections. The 'HandsMen Customers' section shows 'Recently Viewed' items: 'HandsMen Customer Name', 'Harry', and 'JAMES'. The main form area has a 'Information' section with fields for 'HandsMen Customer Name' (required), 'Email', 'Phone', 'Loyalty Status' (dropdown menu), 'FirstName', 'LastName', and 'Total Purchases'. The 'Owner' field is set to 'Sakshi Koche'. At the bottom, there are 'Cancel', 'Save & New', and 'Save' buttons.

5. User Role & Profile Setup

- Cloned the Standard User profile to a new profile named Platform 1 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 with the 'Users' tab selected. The 'User Edit' form is displayed, showing the following fields and values:

General Information		Role
First Name	Niklaus	Sales
Last Name	Mikaelson	User License
Alias	nmika	Salesforce
Email	nmik@gmail.com	Profile
Username	nmika001@gmail.com	Platform 1
Nickname	nmika1	Active
Title		<input checked="" type="checkbox"/>
Company		Marketing User
Department		<input type="checkbox"/>
Division		Offline User
		<input type="checkbox"/>
		Knowledge User
		<input type="checkbox"/>
		Flow User
		<input type="checkbox"/>
		Service Cloud User
		<input type="checkbox"/>
		Site.com Contributor User
		<input type="checkbox"/>
		Site.com Publisher User
		<input type="checkbox"/>
		WDC User
		<input type="checkbox"/>
		Data.com User Type
		--None--
		<input type="checkbox"/>
		Data.com Monthly Addition Limit
		300
		<input type="checkbox"/>
		Accessibility Mode (Classic Only)
		<input type="checkbox"/>
		High-Contrast Palette on Charts
		<input type="checkbox"/>
		Load Lightning Pages While Scrolling
		<input checked="" type="checkbox"/>

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 these templates and linked to automation flows.

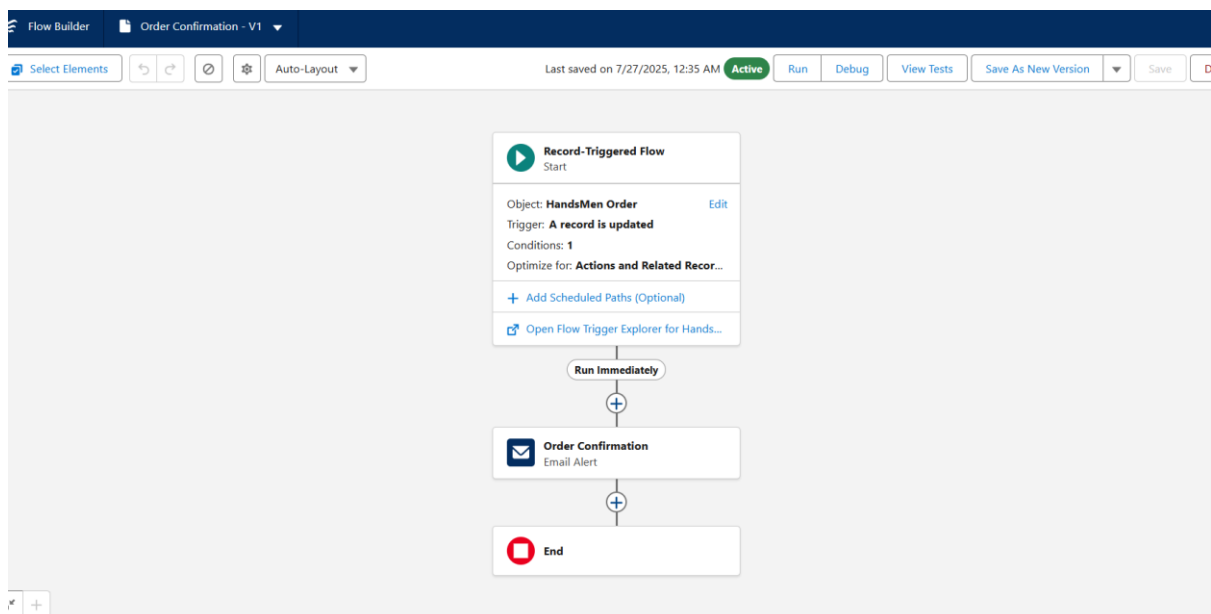
Dear {!HandsMen_Order__c.HandsMen_Customer__c},
Your order #{!HandsMen_Order__c.Name} has been confirmed!
Thank you for shopping with us.
Best Regards,
Sales Team

HTML Email Template: Order_Confirmation_Email ~ Salesforce -

8. Flow Implementations

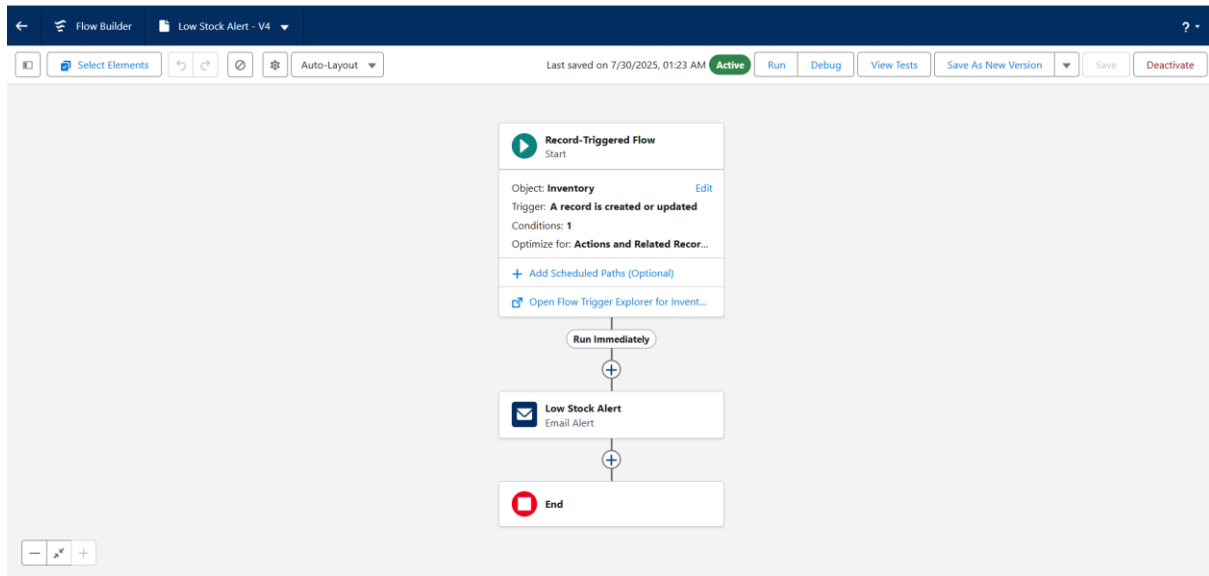
a. Order Confirmation Flow

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



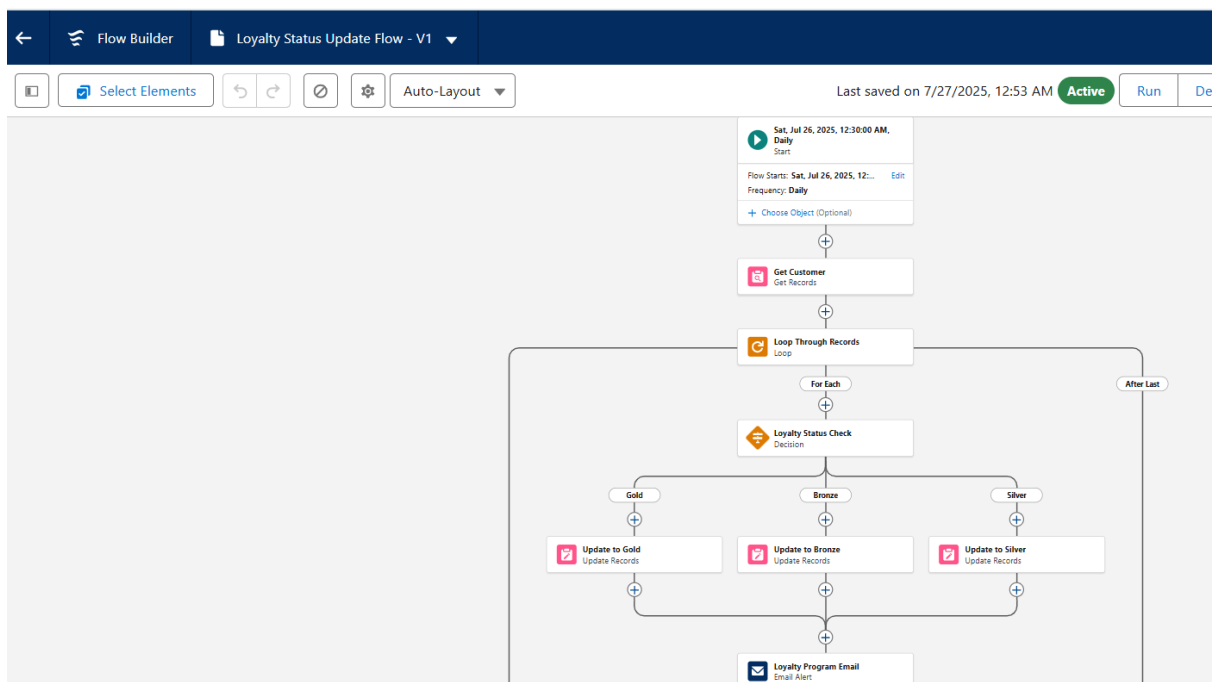
b. Stock Alert Flow

- Triggered when Inventory stock 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, Elijah Mikaelson, 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 (e.g., 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

- Elijah 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 x 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

- Elijah now has a total purchase of \$1000.
- A trigger on Customer checks his total purchases.

Based on Value:

<500 – Bronze

500-1000 – Silver

>1000 – Gold

- So, Elijah becomes a silver member.

6. Email Notification

- When a new order is placed or loyalty status is updated.
- Flow + Email Alert is triggered.
- Elijah 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

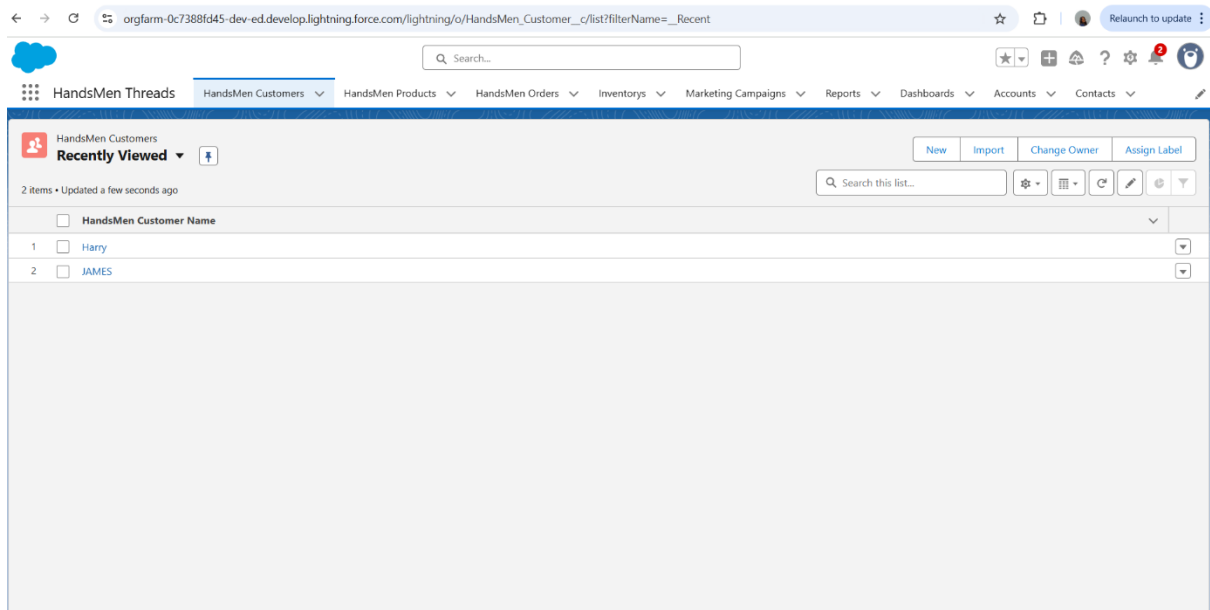


Fig: Handsmen Threads App Launcher

<div> Object Manager </div> <div> <div>Quick Find</div> <div>Schema Builder</div> <div>Create</div> </div>					
52+ Items, Sorted by Last Modified					
LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Marketing Campaign	Marketing_Campaign__c	Custom Object		7/26/2025	✓
Inventory	Inventory__c	Custom Object		7/26/2025	✓
HandsMen Order	HandsMen_Order__c	Custom Object		7/26/2025	✓
HandsMen Product	HandsMen_Product__c	Custom Object		7/26/2025	✓
HandsMen Customer	HandsMen_Customer__c	Custom Object		7/26/2025	✓
Work Type Group Member	WorkTypeGroupMember	Standard Object			
Work Type Group	WorkTypeGroup	Standard Object			
Work Type	WorkType	Standard Object			
Work Step Template	WorkStepTemplate	Standard Object			
Work Step	WorkStep	Standard Object			

Fig: Custom Objects Created

New HandsMen Customer

* = Required Information

Information

*HandsMen Customer Name

Owner: Sakshi Koche

Email

Phone

Loyalty Status: --None--

FirstName

LastName

Total Purchases

Buttons: Cancel, Save & New, Save

Fig: Handsmen Customers

New HandsMen Order

* = Required Information

Information

HandsMen Order Number

Owner: Sakshi Koche

Customer: Search HandsMen Customers...

Status: --None--

Quantity

Total Amount

*Customer Email

HandsMen Product: Search HandsMen Products...

Buttons: Cancel, Save & New, Save

Fig: Handsmen Order

New HandsMen Product

* = Required Information

Information

* HandsMen Product Name

Owner

Order

SKU

Price

Stock Quantity

HandsMen Order

Fig: Handsmen Product

New Inventory

* = Required Information

Information

Inventory Number

* Product

Stock Quantity

Warehouse

HandsMen Product

Fig: Inventory

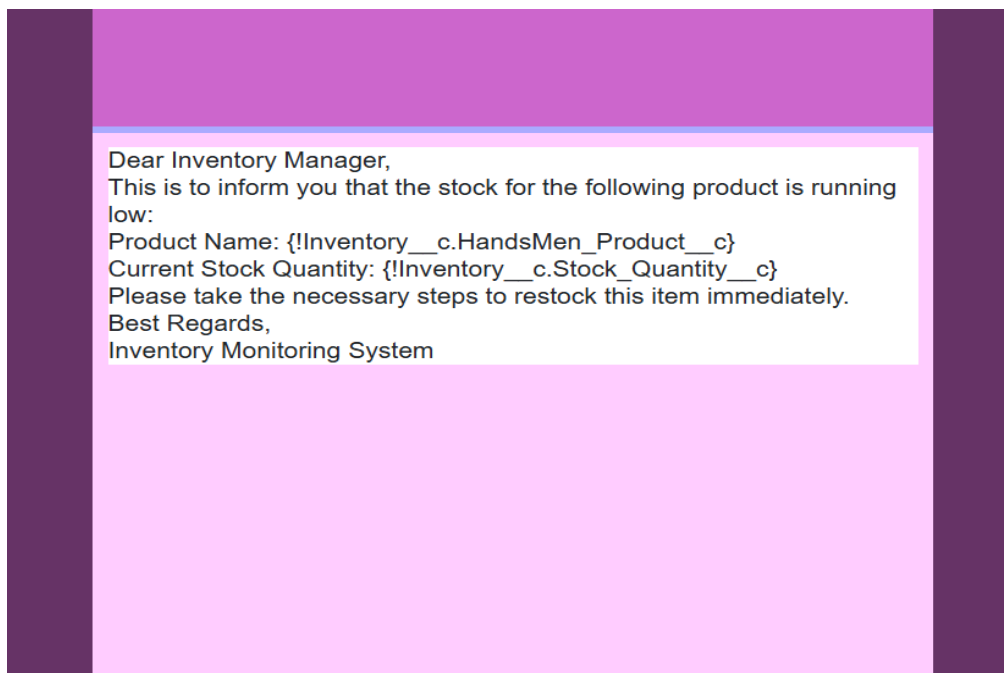


Fig: Low Stock Alert Email

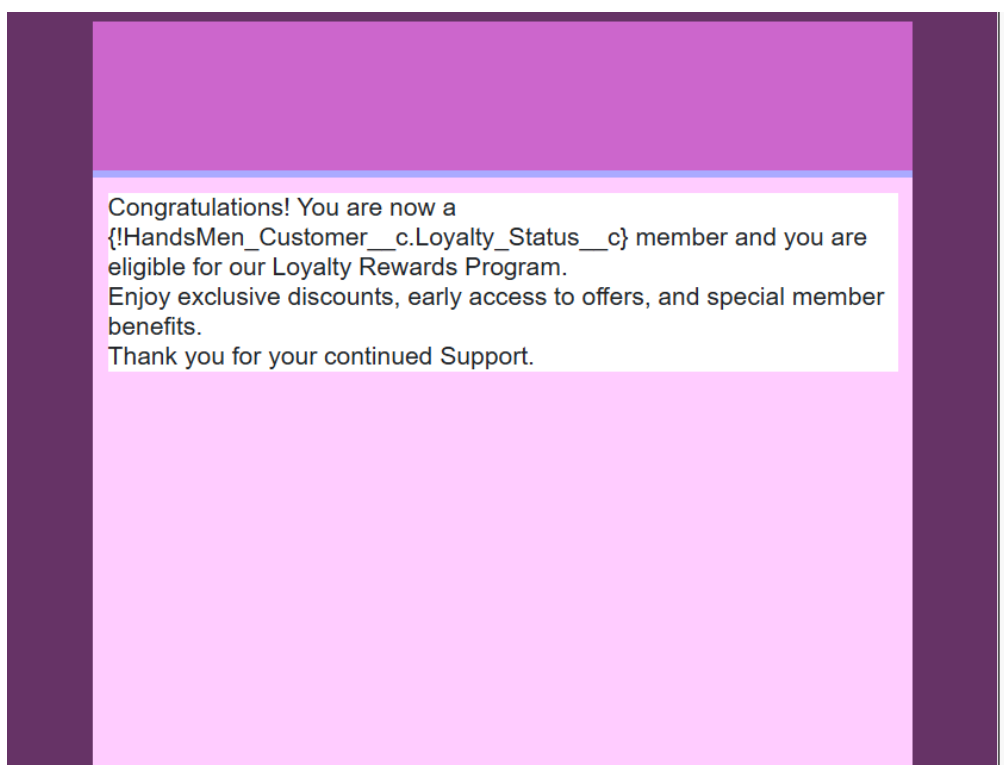


Fig: Loyalty Status Update Mail

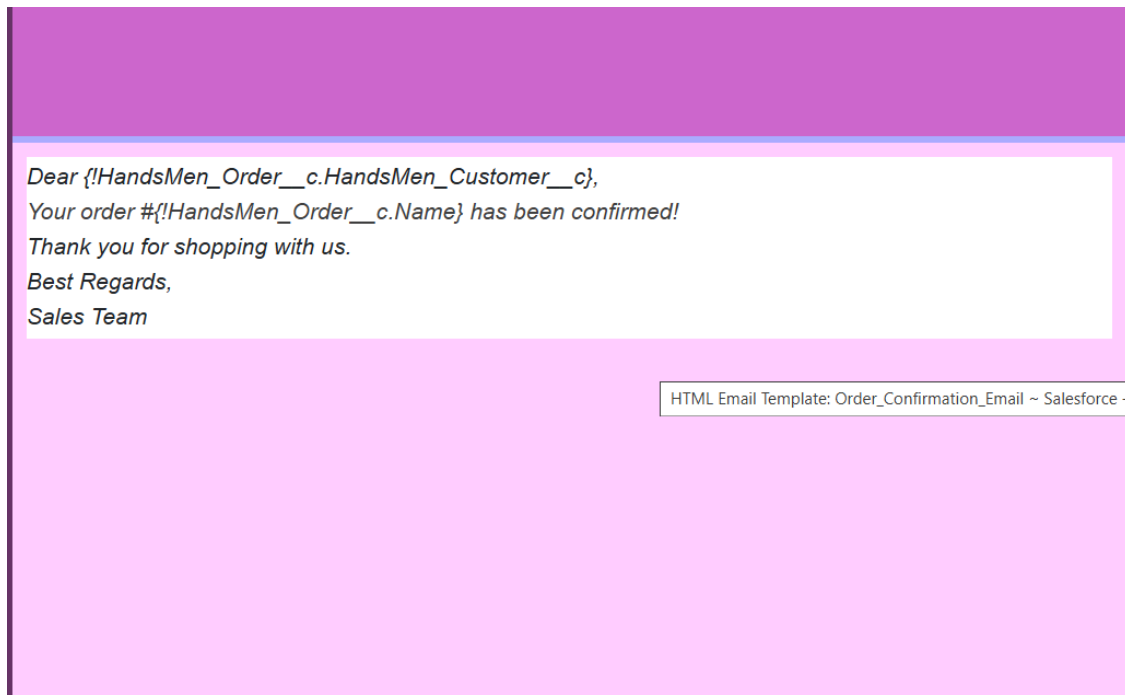


Fig: Order Confirmation Email

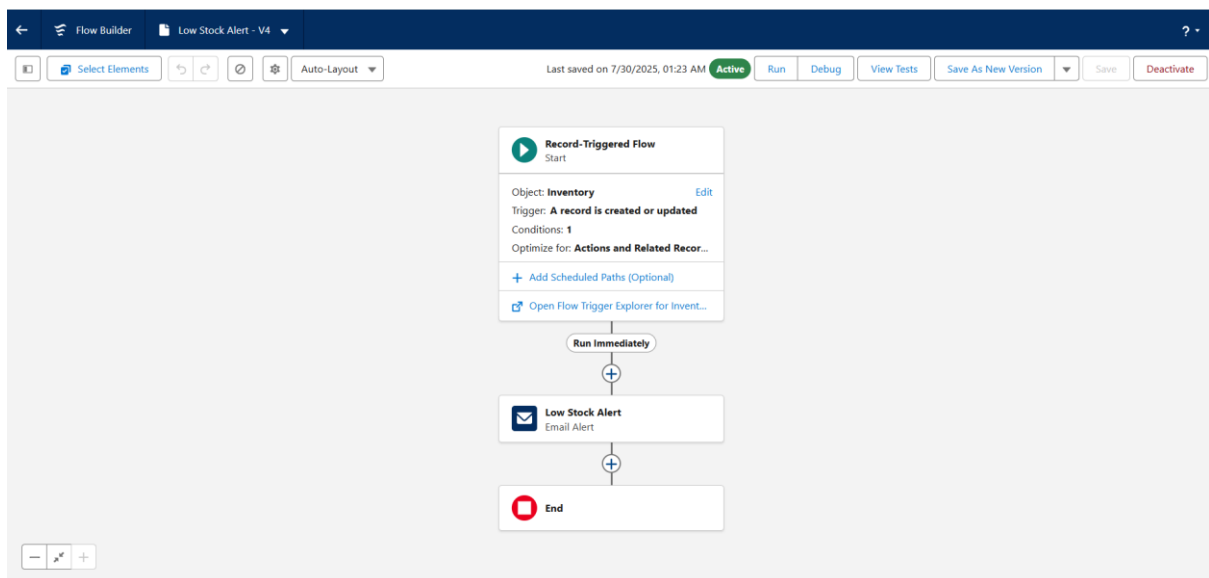


Fig: Low Stock Alert Flow

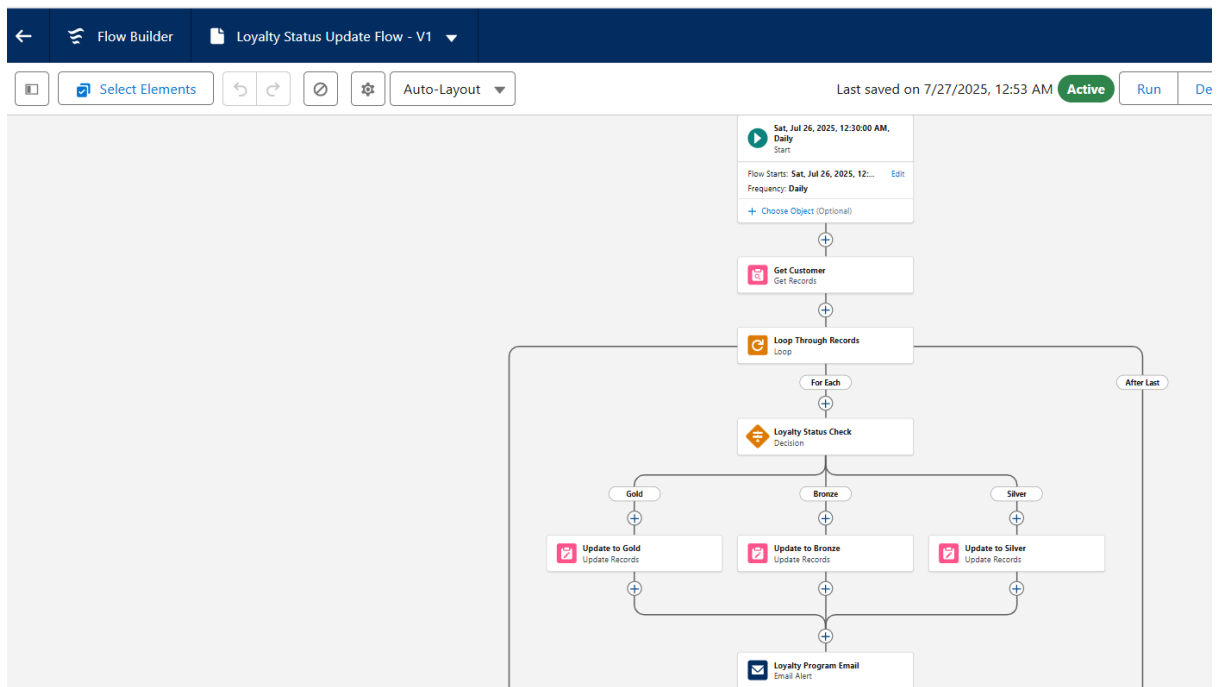


Fig: Loyalty Status Flow

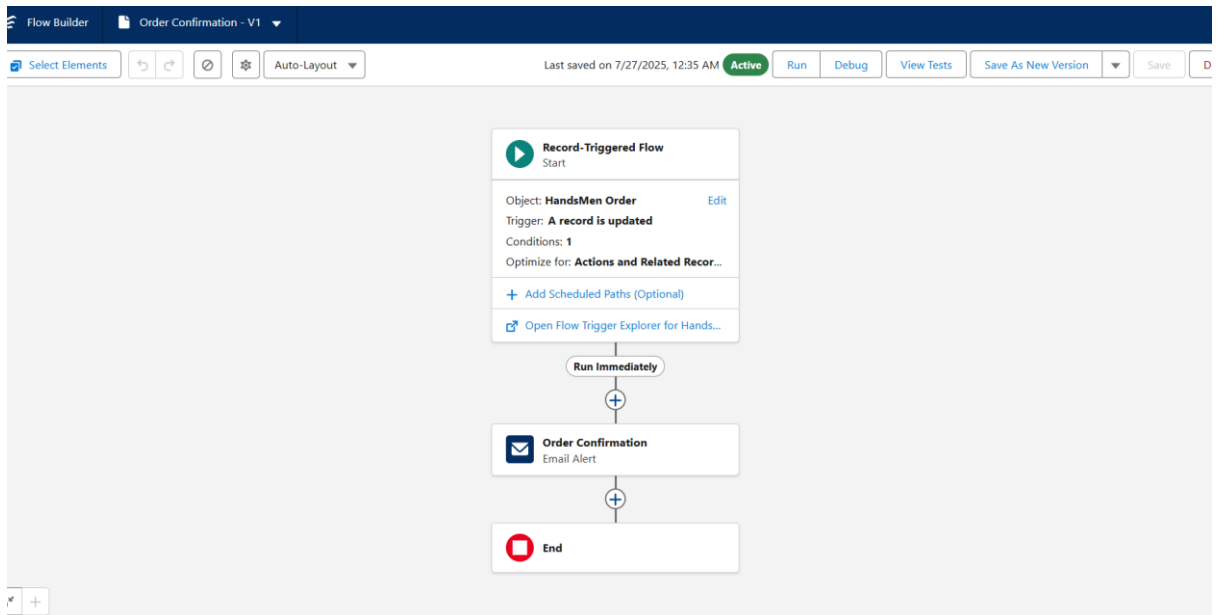


Fig: Order Confirmation Flow