

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

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

Abstract

This project demonstrates the creation of a custom Salesforce CRM system for HandsMen Threads, a high-end fashion business dealing with men's wear and custom tailoring. The main objective was to automate internal procedures, enhance customer interaction, and ensure data consistency quality across departments.

To do this, a comprehensive data model was established, with five primary custom objects: Customer, Order, Product, Inventory, and Marketing Campaign. Automation was the focus of the solution, and record-triggered flows, scheduled flows, email notifications, and Apex code were used to process order confirmations, update loyalty status, and provide proactive inventory alerts.

To ensure data security and integrity, validation rules were applied and a role-based access model was adopted for the inventory, sales, and marketing departments. A scheduled Apex batch job was also put in place to regularly verify and update low-stock inventory quantities.

Overall, this end-to-end Salesforce CRM implementation increases customer experience with tailored interactions, maximizes operational efficiency with automation, and provides a scalable platform to facilitate the brand's future growth on the Salesforce platform.

Objective

The main objective of this project is to develop and deploy a customized Salesforce CRM solution for HandsMen Threads to automate business processes, maintain data accuracy, and improve overall customer satisfaction. The solution deals with creating a centralized platform to effectively manage customers, orders, products, inventory, and marketing campaigns.

The main objectives are:

- Automating key workflows like order confirmations and loyalty status
- Maintaining consistent and error-free data entry
- Creating real-time visibility into customer interactions and inventory levels
- Enhancing collaboration among departments with role-based access controls
- Delivering custom customer experiences through targeted communication and loyalty programs

Technology Description

Salesforce Overview:

Salesforce is a cloud-based customer relationship management (CRM) platform that enables organizations to manage customer information, automate processes, and streamline sales, service, and marketing operations. It provides both declarative (such as Flows) and programmatic (such as Apex) features to create tailor-made business applications.

1. Custom Objects:

Custom Objects in Salesforce are used like database tables. They are developed to store data particular to an organization's business requirements.

Examples:

- Customer__c: Stores customer-specific information
- Product__c: Stores product details
- Order__c: Stores records of orders

2. Tabs:

Tabs enable users to display and work with object data using the Salesforce user interface.

Example:

- Product__c tab enables users to display, create, and work with product records effectively.

3. Custom Apps:

A custom app in Salesforce is a group of tabs and features that are combined to achieve a specific business function, e.g., inventory management or order processing.

4. Profiles:

Profiles dictate what a user has access to and can perform in the Salesforce system. They establish permissions for objects, fields, tabs, and so on.

5. Roles:

Roles decide the visibility of data within the org hierarchy. They apply to sharing rules and impact what records users can see or report on.

6. Permission Sets:

Permission Sets are utilized in order to grant extra rights of access to users without changing their current profiles. They offer flexibility when dealing with user permissions.

7. Validation Rules:

Validation Rules impose data entry rules by validating input against specified conditions.

Examples:

- Email address should have "@gmail.com"
- Stock amount should be zero or above

8. Email Templates:

Preformatted email templates applied for customer or internal user communication.

Example:

- An automated "Order Confirmation" email template following a purchase.

9. Email Alerts:

Email Alerts are automatically sent messages initiated by workflows or flows based on predetermined templates.

Example:

- When a customer's level of loyalty is changed, an email alert is triggered to remind them.

10. Flows:

Flows are declarative elements of Salesforce that facilitate the automation of business processes like creating or modifying records, sending notifications, or performing conditional logic.

Example:

- A flow triggers an email notification when a new order is received.

11. Apex:

Apex is a statically typed, object-oriented programming language utilised by Salesforce to deliver sophisticated custom logic beyond Flow capabilities.

Example Triggers:

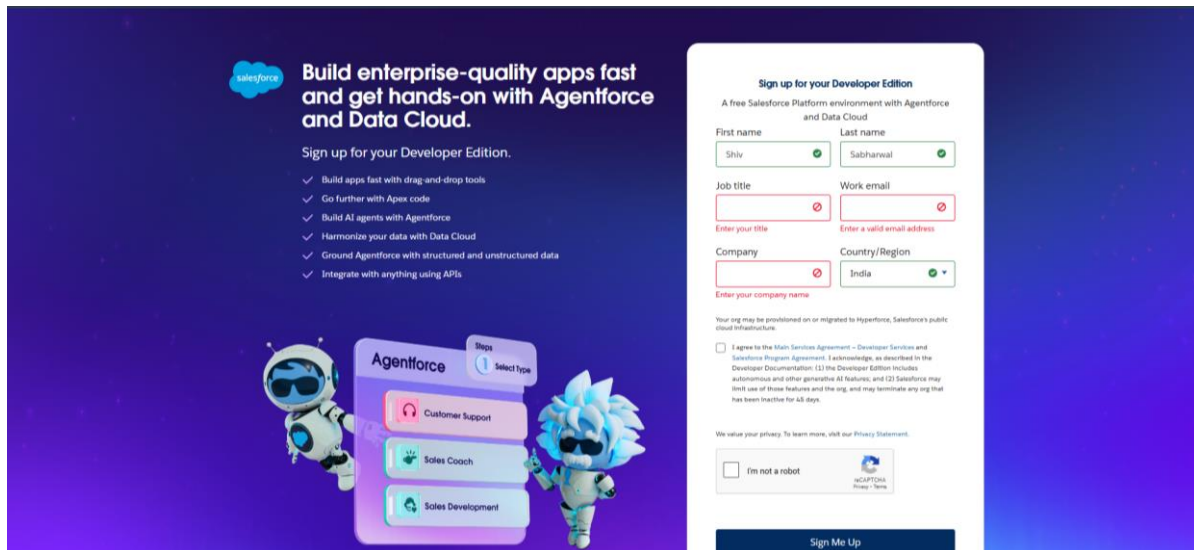
- Update the Total_Amount__c field on the order object automatically
- Reduce the inventory quantity of a product when an order is made

Step-by-Step Implementation of Project Stages

1. Developer Org Configuration

A sole Salesforce Developer Org was created through developer.salesforce.com/signup.

After registration, the account was confirmed, login credentials were set, and complete access to the Salesforce Setup menu was provided.



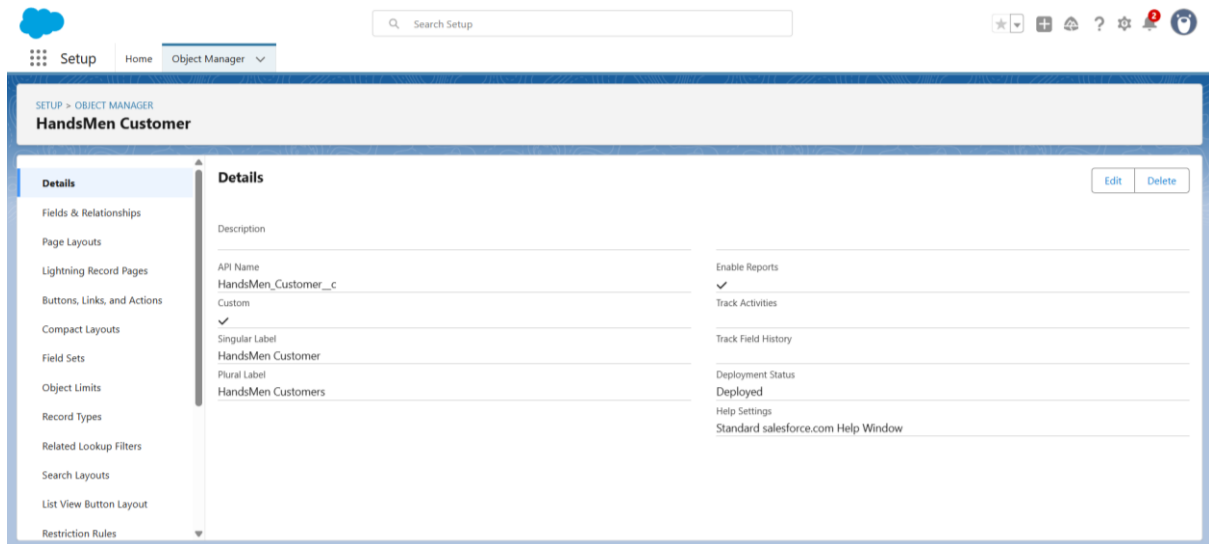
2. Custom Object Creation

Five custom objects were created and set up to capture key business data:

- HandsMen Customer – Stores customer information such as email, contact number, and loyalty level.
- HandsMen Product – Stores product catalog details like SKU, price, and quantity.
- HandsMen Order – Stores customer purchases, quantity, and order status.
- Inventory – Stores available stock and warehouse location per item.
- Marketing Campaign – Stores campaign schedules, target groups, and promo data.

Steps Used:

- Accessed Setup → Object Manager → Create → Custom Object
- Defined object labels, names, enabled search/report settings
- Created corresponding tabs for each object for UI accessibility



3. Creating the Lightning App

- A Lightning App named "HandsMen Threads" was created to consolidate CRM activities.
- Tabs Included:
 - HandsMen Customer
 - Order
 - Product
 - Inventory
 - Marketing Campaign
 - Reports
- The application was deployed to the System Administrator profile for unrestricted access.

4. Validation Rules

To impose business logic and maintain data integrity, the following validation rules were set:

- **Order Object:** Forbids submission of orders with total amount ≤ 0 .
Error Message: "Please enter a valid order amount."
- **Customer Object:** Ensures that the email has @gmail.com.
Error Message: "Please enter a valid Gmail address."

The screenshot shows a web form titled "New HandsMen Customer". The form has a tab labeled "Information". Fields include "HandsMen Customer Name" (with "james" entered), "Email" (with "james" entered and a red border), "Phone", "Loyalty Status" (dropdown menu), "FirstName", and "LastName". A red error message box is overlaid on the form, stating "We hit a snag. Review the following fields" with a bullet point for "Email". Below the error box, there are buttons for "Cancel", "Save & New", and "Save". A red circle with a slash is also visible near the bottom left of the form.

5. Role and Profile Configuration

- A new profile called Platform 1 was created through cloning the Standard User profile.
- Access to all appropriate custom objects was provided.
- User Roles Defined:
 - Sales Manager – Manages customer acquisition and order processes
 - Inventory Manager – Tracks product availability and stock updates
 - Marketing Team – Manages campaigns and customer engagement

6. User Setup and Assignment

Users were added and assigned to roles and profiles based on their tasks:

- Niklaus Mikaelson → Role assigned: Sales Manager
- Kol Mikaelson → Role assigned: Inventory Manager

This role-based configuration ensures access control and facilitates clear functional segregation.

The screenshot shows the Salesforce Setup interface. On the left, the 'Setup' menu is open, and 'Users' is selected under 'User Management Settings'. The main content area is titled 'Users' and shows the 'User Edit' form for 'Niklaus Mikaelson'. The form has tabs for 'General Information', 'Permissions', and 'Advanced'. The 'General Information' tab is active, showing fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. On the right, there are dropdown menus for Role (Sales), User License (Salesforce), and Profile (Platform 1). Below these are checkboxes for various user types: Active, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, and Data.com User Type (set to --None--).

7. Email Templates & Alerts

Three dynamic email templates were created to facilitate business communication workflows:

- Order Confirmation Email – Triggers when an order status is updated to Confirmed
- Low Stock Notification – Sent when product amount decreases below 5 units
- Loyalty Tier Update – Sent when customer's loyalty status changes

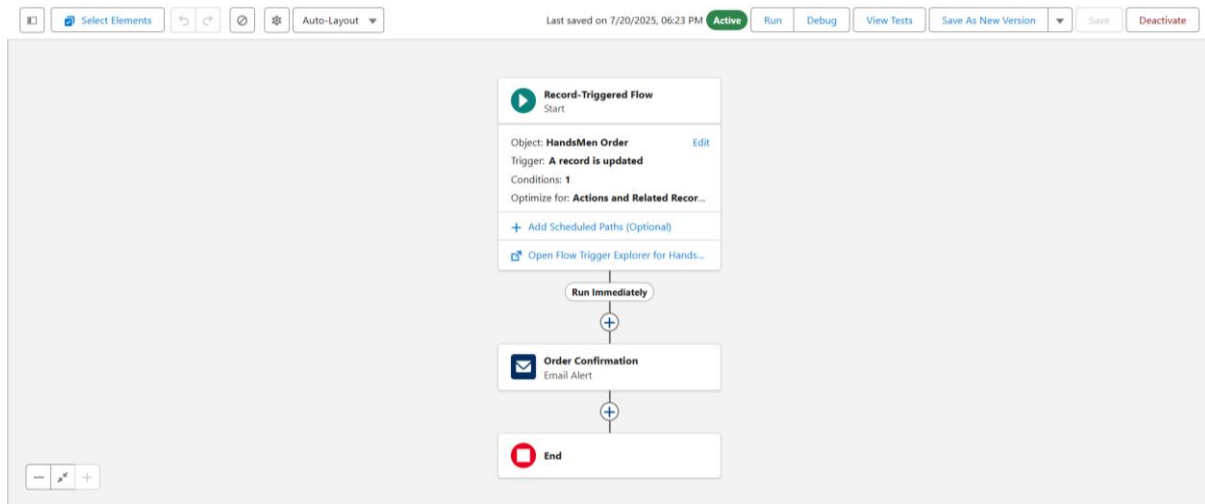
Email Alerts were set up based on these templates and included in respective flows.

The screenshot shows the Salesforce Setup interface. On the left, the 'Setup' menu is open, and 'Classic Email Templates' is selected under 'Email'. The main content area is titled 'Classic Email Templates' and shows the 'Email Template' form. The form has a 'Subject' field with the text 'Your Order has been Confirmed!'. Below the subject, there is a preview of the email body, which includes a redacted section (indicated by a red box) and the following 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'.

8. Flow Automation

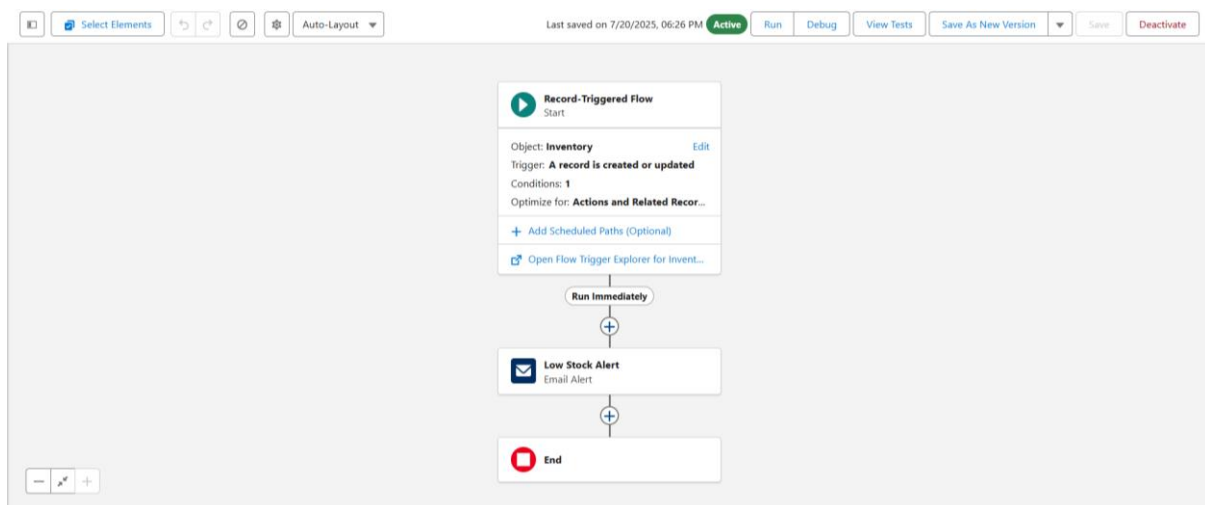
a. Order Confirmation Flow

- Trigger: When order status is updated to Confirmed
- Action: Sends confirmation email to customer



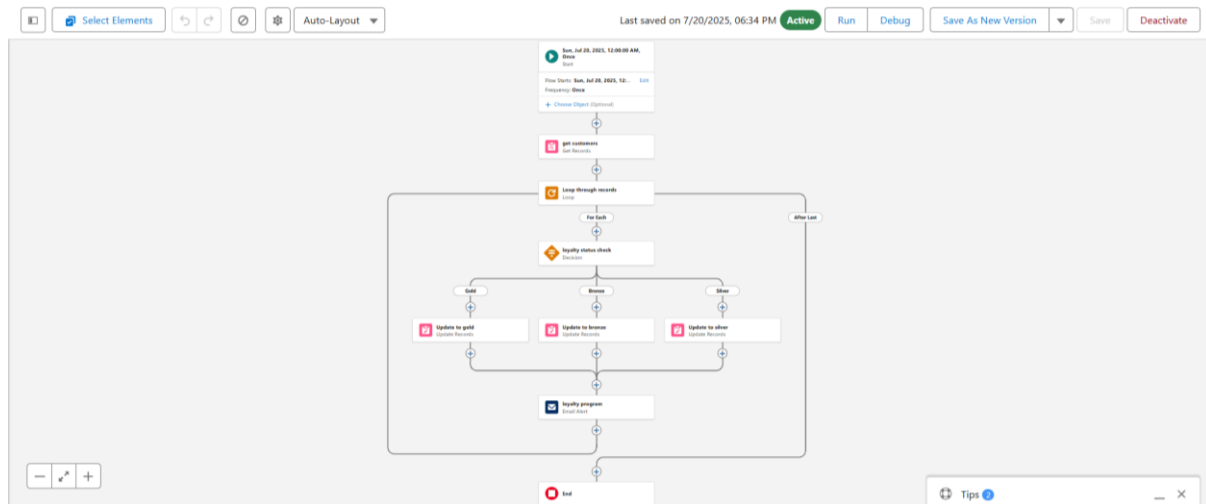
b. Stock Alert Flow

- Trigger: Inventory level decreases below threshold (5 units)
- Action: Triggers a low-stock alert to the Inventory Manager



c. Scheduled Loyalty Update Flow

- Schedule: Runs once a day at 12:00 AM
- Function: Checks customer purchase amounts and updates loyalty level accordingly



9. Apex Trigger Implementations

- **Order Total Calculation:** Calculates automatically the order total amount by quantity × unit price.
- **Inventory Stock Deduction:** Decrements inventory quantity when an order is executed.
- **Loyalty Tier Evaluation:** Updates a customer's loyalty tier based on total purchase history.

Project Explanation With Real-World Example

Let's go through it as an actual customer interaction.

1. Customer Registration

- Customer, Elijah Mikaelson, comes into the store or site.
- In Salesforce: A new record is created in the Customer object with his name, phone, email, etc.
- Validation Rule: Validates the email (e.g., should have @gmail.com).

2. Product Setup

- Admin puts products such as Shirts, Jeans, etc., into the Product _c object.
- Every product has a price and so on.
- Inventory is also generated to handle stock for these products.

3. Order Placement

- Elijah orders 2 shirts (each 2500). An order is placed.
- In Salesforce: New Order record is created.
- Apex Trigger: Automatically computes $\text{Total_Amount_c} = 2 \times 500 = 21000$.

4. Inventory Update

Immediately after placing the order:

- Apex Trigger on Inventory: Decreases shirt stock by 2.
- Validation Rule: Never allows stock to fall below 0.

5. Loyalty Program

- Elijah now has a total purchase of 21000.
- Trigger on Customer checks his total purchases.
- Depending upon the value:
 - Up to ₹500 → Bronze
 - ₹500 - ₹1000 → Silver
 - ₹1000 and Above → Gold
- So, Elijah becomes a Silver member.

6. Email Notifications

- When a new order is placed or loyalty status is updated:
 - Flow + Email Alert is activated.
- Elijah receives an email:
 - "Thanks for shopping! Your loyalty status is now Silver."

7. Users and Roles

Salesforce users such as store employees are created:

- Niklaus Mikaelson - Sales Role (Platform 1 Profile)
- Kol Mikaelson - Inventory Role (Platform 1 Profile)

Conclusion

The HandsMen Threads CRM system, built on the Salesforce platform, has successfully streamlined essential business functions such as customer management, product catalog management, order tracking, inventory management, and loyalty program implementation. By utilizing primary Salesforce functionalities—Custom Objects, Flows, Validation Rules, Email Alerts, and Apex Triggers—the system maintains correct data processing, real-time automation, and hassle-free customer interaction.

This optimized strategy not only cuts down manual effort and operational latency but also provides role-based access control, facilitating departmental cooperation and data protection. The solution sets a scalable and effective base for future business expansion, providing performance reports as well as improved customer interaction.

Future Scope

For further system improvement and adherence to changing business requirements, the following developments are suggested:

1. Customer Self-Service Portal

Create a Salesforce Customer Community Portal so that customers can:

- See their order history
- Track loyalty points and tier levels
- Create support requests or feedback

2. Mobile App for Store Operations

Create a mobile app leveraging the Salesforce Mobile SDK such that store employees can:

- Manage real-time product inventory
- Process orders remotely
- Access customer and sales data remotely

3. Advanced Reporting & Dashboards

Create dynamic dashboards and analytics reports to enable management:

- View sales trends and performance
- Monitor inventory health
- Make informed business decisions

4. AI-Driven Personalization

Embed Salesforce Einstein AI to provide:

- Personalized product recommendations
- Predictive sales insights
- Intelligent segmentation for marketing campaigns

5. Omni-Channel Communication Integration

Embed WhatsApp and SMS gateways to:

- Inform customers in real-time regarding order status, loyalty updates, and offers
- Enhance customer engagement through real-time notifications