

HANDSMEN THREADS- ELEVATING THE ART OF SOPHISTICATION IN MEN'S FASHION

Abstract:

In a competitive and evolving fashion industry, building strong relationships with customers is as crucial as delivering quality products. The HandsMen Threads project represents a digital transformation journey of a premium men's fashion brand using Salesforce CRM. The aim was to shift from traditional manual tracking methods to a more robust, scalable, and automated system. The system ensures streamlined order processing, effective stock management, personalized loyalty programs, and consistent communication with clients.

By leveraging powerful Salesforce tools like custom data models, record-triggered flows, validation rules, Apex, and automated emails the brand achieved operational efficiency and improved customer satisfaction. This project provides not just a technological solution, but a sustainable business upgrade tailored to modern customer expectations.

Objectives:

The core objective of this project is to build a smart, integrated CRM system using Salesforce for HandsMen Threads — a brand that targets elite male clients with tailored fashion solutions. Traditional customer tracking and communication methods were proving inefficient and error-prone.

This project focuses on:

- Improving the visibility of customer orders and their statuses.
- Creating a loyalty program that dynamically tracks points.
- Automating repetitive tasks like confirmation emails and bulk updates.
- Monitoring inventory levels and sending real-time alerts when needed.
- Ensuring smooth user interaction with a custom Lightning App.
- Maintaining clean, validated data throughout the CRM system.

These objectives were fulfilled by combining low-code tools with Apex programming for advanced customizations.

Technology Descriptions:

1. Salesforce CRM

Salesforce is a cloud-based platform offering a 360° view of customers. It provides tools for marketing, service, sales, analytics, and app development. In this project, Salesforce is used as the central system for managing orders, customers, inventory, and automation.

2. Custom Objects

Custom Objects allow us to build new database tables that are specific to our business needs. In this project, objects like `Customer_Orders__c`, `Loyalty_Program__c`, and `Bulk_Order_Request__c` were created. These allow the app to handle specific workflows like loyalty tracking or bulk order handling, which are not available in Salesforce standard objects.

3. Tabs

Tabs offer a user interface to interact with objects. Each custom object has an associated tab so users can easily create, view, and edit records. Tabs make navigation smooth and accessible for users of all skill levels.

4. Custom Apps

A Custom App named HandsMen Threads CRM was created using the Lightning App Builder. It brings all the relevant tabs, reports, and dashboards into one interface tailored for the brand. The app ensures that internal teams can manage everything from a single location.

5. Profiles

Different user profiles were defined — Admin, Order Manager, and Stock Handler. Each profile had specific access permissions configured to control visibility and edit rights over data.

6. Validation Rules

These rules are crucial for data integrity. For example:

- Preventing submission of orders without a valid customer email.
- Disallowing updates on stock quantity below zero.
- Enforcing loyalty updates only on completed orders.

7. Email Templates

Templates were created for:

- Order confirmation
- Low stock warnings
- Loyalty point updates

8. Flows

Flows handled major backend automation:

- Updating loyalty points when an order is completed.
- Sending an email to the warehouse when stock goes below threshold.
- Creating tasks for follow-up on large orders.

9. Apex

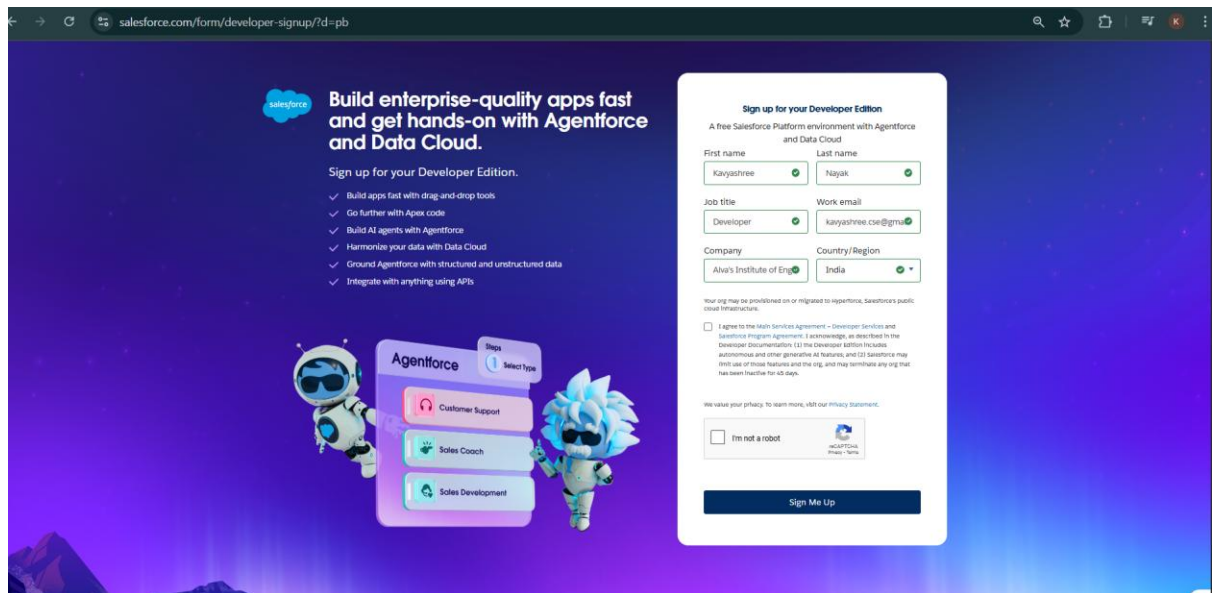
Apex was used for:

- Writing logic to process bulk orders in batches.
- Automatically calculating loyalty rewards.
- Sending scheduled updates using Batch Apex classes.

Detailed Execution of Project Phases:

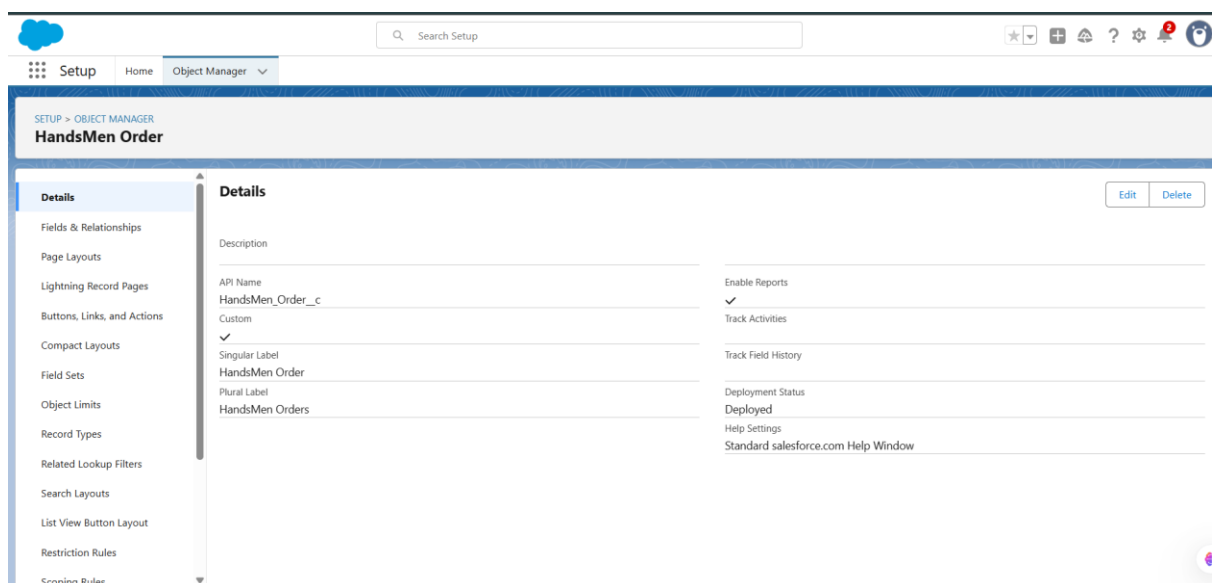
1. Developer Org Setup

- A Salesforce Developer Org was created using <https://developer.salesforce.com/signup>
- After account creation, email verification and password setup were completed.
- Access to the Salesforce setup page was granted, and the environment was ready for development activities.



2. Custom Object Creation

- Multiple custom objects were created to represent core entities:
 - Customer__c for customer details
 - Order__c for managing purchases
 - Loyalty_Program__c for tracking points
- Each object was designed with custom fields like picklists, formulas, and lookup fields to maintain relationships.



3. Lightning App Building

- A custom Lightning App was built named “HandsMen Threads CRM”.
- Tabs for all custom objects were added to the app navigation bar.
- The app provided a structured UI for the sales and service teams to manage data effectively.

4. Validation Rules Implementation

- Validation rules were created to maintain data quality:
 - Ensured email fields contained proper format using REGEX.
 - Prevented order creation without required customer details.
 - Disallowed negative or zero values in the stock field.
- These rules provided immediate feedback to users, reducing errors.

New HandsMen Customer

* = Required Information

Information

* HandsMen Customer Name

Ram

Email

Ram@xyz.com

Phone

Loyalty Status

--None--

FirstName


K

LastName

Ram

Total Purchases


Owner

 Kavyashree Nayak

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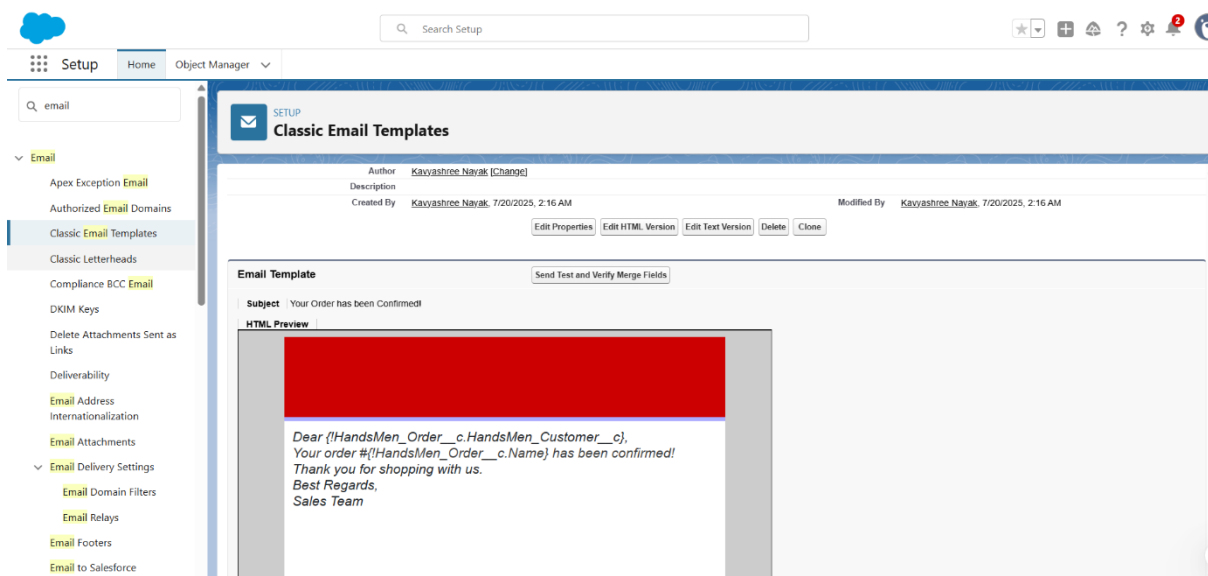
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5. Email Templates Creation

- Email templates were designed for automated communication:
 - Order Confirmation: Sent to customers upon successful order creation.
 - Loyalty Update: Notified customers when their loyalty points were updated.
 - Stock Alert Notification: Sent internally when product stock falls below a defined level.
- Templates were customized with merge fields (e.g., customer name, order number) for personalization.



6. Alerts and Notifications

- Real-time alerts were implemented using record-triggered flows and Apex triggers.
- Example:
 - When a product's quantity falls below a threshold, a flow sends an alert email to the inventory team.
 - Bulk order requests trigger task assignments for the order manager using Apex.
- These alerts ensured no delays in stock replenishment or order handling.

Project Explanation with Real-World Example:

Scenario: A Premium Customer Places a Custom Order

Let us consider a real-world situation where a loyal customer, Mr. Aryan, places a custom bulk order for designer suits from HandsMen Threads.

Step 1: Order Entry

- The sales executive logs in to the HandsMen Threads Lightning App.
- They navigate to the Orders__c tab and enter all necessary order details such as product name, quantity, delivery address, and expected delivery date.
- The customer record is linked via a lookup relationship to ensure the order is tied to the correct Customer__c.

Step 2: Validation Checks

- Once the order details are filled in, validation rules are triggered.
- Example:
 - If the Order_Value__c is below the minimum required for loyalty points, the system displays an error message.
 - If any mandatory field (like Delivery_Address__c or Order_Date__c) is empty, the record cannot be saved.
- These rules ensure that only clean and complete data enters the system.

Step 3: Record-Triggered Flow Activation

- Once the order passes validation and is saved, a record-triggered Flow is automatically launched.
- This Flow performs multiple actions:
 - Sends an email confirmation to the customer using a pre-designed email template.
 - Updates the corresponding record in Loyalty_Program__c to add points based on order value.
 - Sends a real-time notification to the sales dashboard for tracking.

Step 4: Stock Update and Monitoring

- After the order is confirmed, the system checks the availability of the ordered products.
- The Stock__c object is updated by reducing the quantity.
- If the available stock drops below the predefined threshold (e.g., less than 10 units), an automated alert email is sent to the inventory manager using Flow and Email Template.
- This avoids manual inventory checks and supports proactive restocking.

Step 5: Apex-Driven Follow-Up

- For bulk or VIP orders, an Apex trigger identifies the order type.
- If the Order_Type__c field is set to "Custom" or "Bulk", the trigger performs the following:
 - Automatically creates a Task for the Order Manager with high priority.
 - Assigns a follow-up deadline within 24 hours.
 - Logs this activity into the system for performance tracking.

Step 6: Customer Loyalty Update

- Based on the order value, the customer's loyalty tier may also be upgraded.
- The updated loyalty level is reflected in the Customer__c profile.
- A thank-you email is triggered using another template, informing the customer of their new tier and exclusive benefits.

Result

- The entire process from order creation to follow-up is completed without any manual effort.

- It reflects a real-time, intelligent CRM system where sales, inventory, and communication are perfectly aligned.
- The customer receives timely updates, the internal team is notified instantly, and the business runs smoothly.

Screenshots:

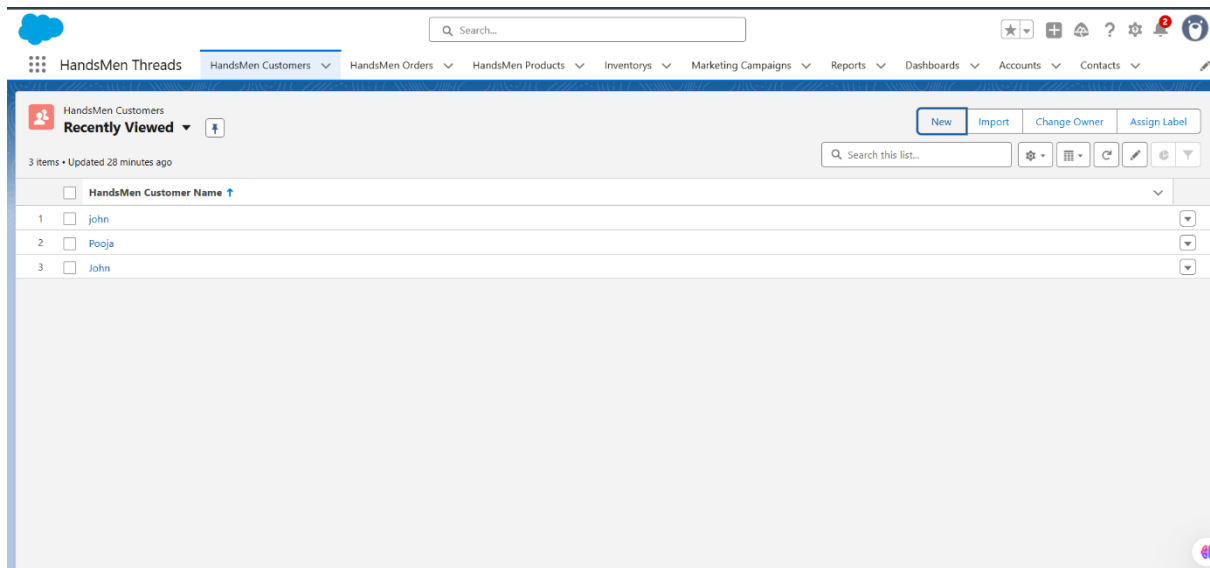


Fig1: Custom App for HandsMen Threads

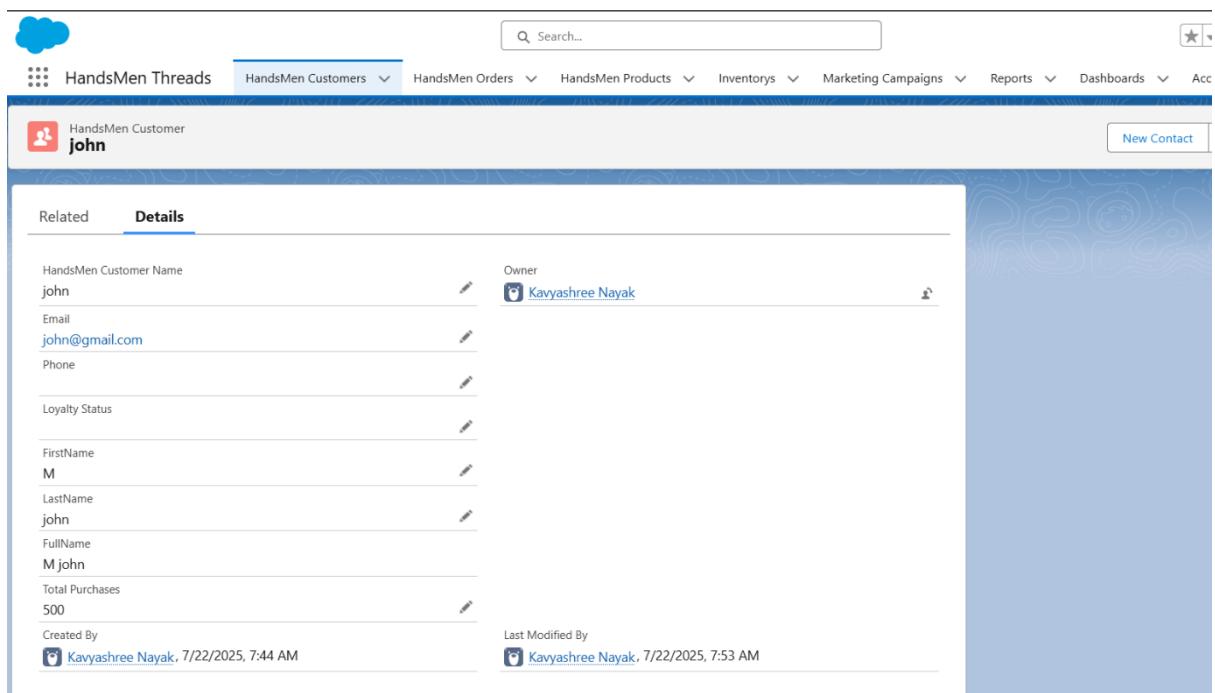


Fig2: Customer Creation in HandsMen Threads

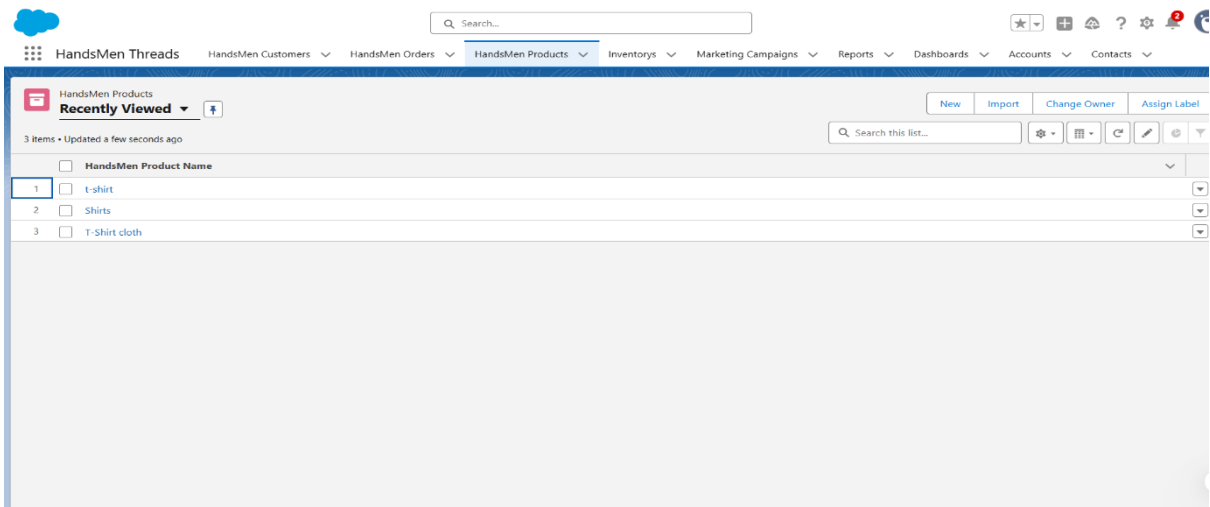


Fig3: Products in HandsMen Threads

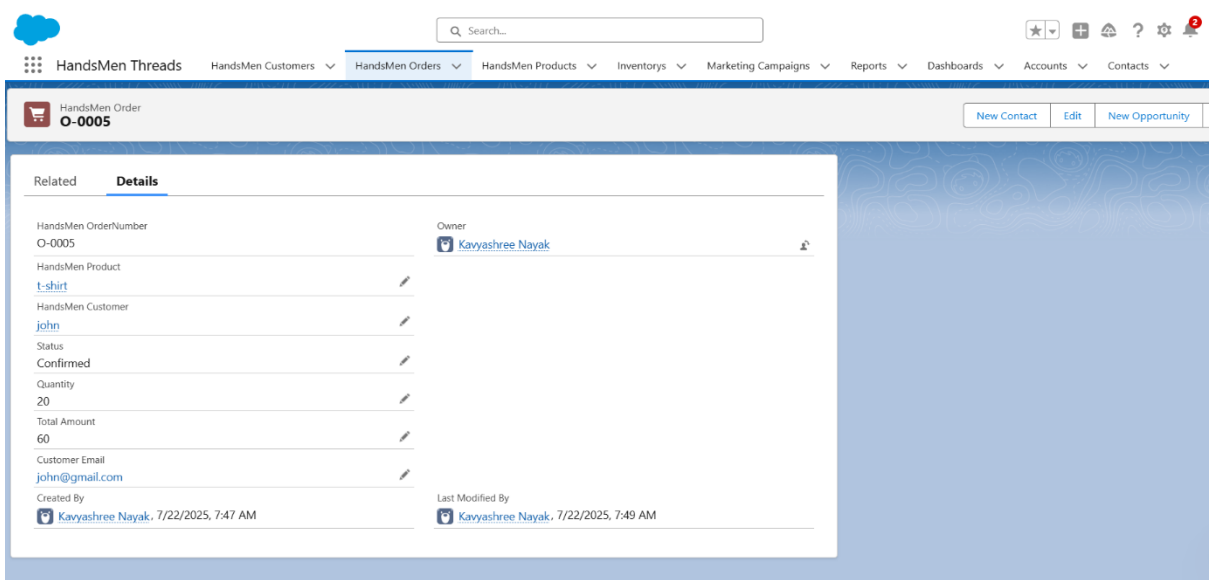


Fig4: Order Confirmation in HandsMen Threads

Fig5: Order Confirmation Flow

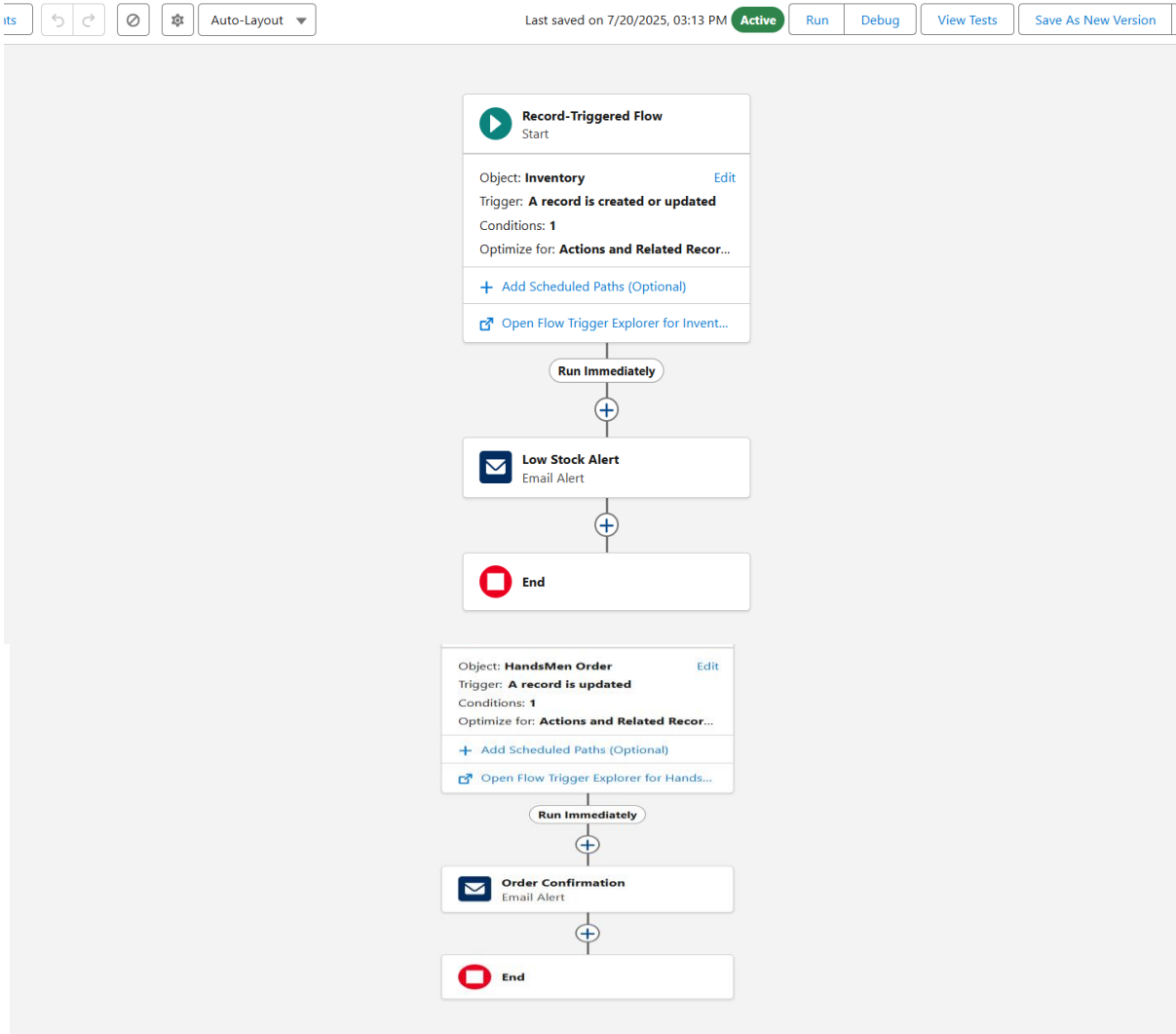


Fig6: Low Stock Alert Flow

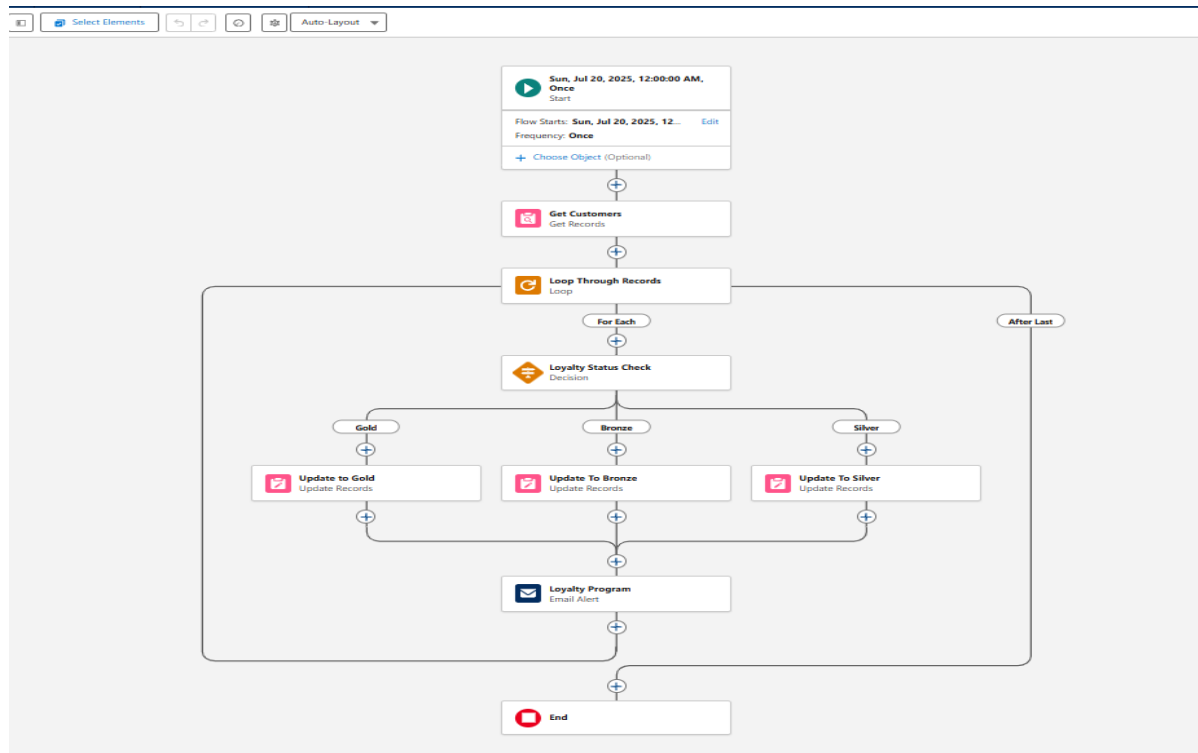


Fig7: Loyalty Program Flow

Conclusion:

The HandsMen Threads CRM system, developed using Salesforce, has successfully digitized and optimized critical business functions such as customer management, product ordering, inventory tracking, and loyalty program automation. With the implementation of tools like Custom Objects, Record-Triggered Flows, Validation Rules, Email Alerts, and Apex programming, the system ensures real-time data accuracy, efficient order handling, and a smooth customer experience.

By reducing manual dependency and automating key processes, the platform enhances overall productivity, minimizes errors, and improves visibility into sales and stock data. With a user-friendly Lightning interface and smart workflows, the project meets modern business needs while offering flexibility for future enhancements.

Future Scope:

1. Customer Portal Integration

- Build a dedicated Customer Community Portal where clients can log in, place new orders, view past orders, and check their loyalty status in real-time.

2. Mobile App using Salesforce Mobile SDK

- Enable warehouse and sales teams to access order records, manage inventory, and communicate with customers on-the-go through a mobile app interface built on Salesforce Mobile SDK.

3. Reports & Dashboards

- Create visually informative dashboards to track sales trends, inventory movement, and customer loyalty analytics empowering decision-makers with real-time insights.

4. Payment Gateway Integration

- Add secure payment methods through platforms like Stripe or Razorpay, allowing customers to complete transactions directly from the CRM portal.

5. Chatbot Integration using Einstein AI

- Implement a smart chatbot using Salesforce Einstein to handle basic customer queries, order tracking, and support without human intervention.