

HandsMen Threads: Enhancing Sophistication

in Men's Fashion with Salesforce CRM

Abstract:

This project showcases the deployment of a tailored Salesforce CRM solution for HandsMen Threads, a premium men's fashion and tailoring brand. The aim was to digitize operations, enhance customer engagement, and uphold data accuracy across departments.

The solution features a custom data model comprising five key objects – Customer, Order, Product, Inventory, and Marketing Campaigns. Automation tools such as Record-Triggered Flows, Schedules Flows, Apex triggers, and Email Alerts were used to manage order confirmation, loyalty updates, inventory management notifications.

To maintain data quality and security, validation rules and role-based access controls were applied. An Apex batch job was implemented to regularly monitor and update low-stock items.

Overall, this solution enhances the customer journey with personalized engagement, ensures process efficiency, and provides a scalable foundation for future growth using the Salesforce Platform.

Objective:

The core objective was to build a customized Salesforce CRM solution for HandsMen Threads to streamline business workflows, maintain consistent data, and enrich customer experiences.

Key goals include:

- Automating core functions such as order processing, stock alerts and loyalty updates.
- Enforcing data quality through validation rules.
- Offering real-time visibility into stock levels and customer activities.
- Strengthening team coordination via access-controlled user roles.
- Delivering personalized experiences through targeted marketing and loyalty programs.

Tech Stack Overview:

Salesforce CRM: A Cloud-based platform for managing customer relationships, automating operations, and supporting custom applications.

Key Salesforce Components Used:

1. Custom Objects:

- HandsMen Customer: Stores client details

- HandsMen Product: Stores product catalog info
- HandsMen Order: Captures customer orders
- Inventory: Tracks stock levels
- Marketing Campaign: Stores promotional campaign data.

2. Tabs: Frontend access points to manage object data.

3. Custom App: Tailored app bundling all relevant tabs.

4. Profiles & Roles: Control user permissions and data access.

5. Permission Sets: Assign additional access beyond profile settings.

6. Validation Rules: Ensure business logic compliance (e.g., email format, non-negative stock).

7. Email Templates & Alerts: Used for automated notifications.

8. Flows: Point-and-click automation tool for tasks like updates and alerts.

9. Apex: Code-based logic for complex workflows (e.g., triggers, batch jobs).

Phase-Wise Execution:

1. Org Setup:

Developer Org created via Salesforce official portal,

<https://developer.salesforce.com/signup>.

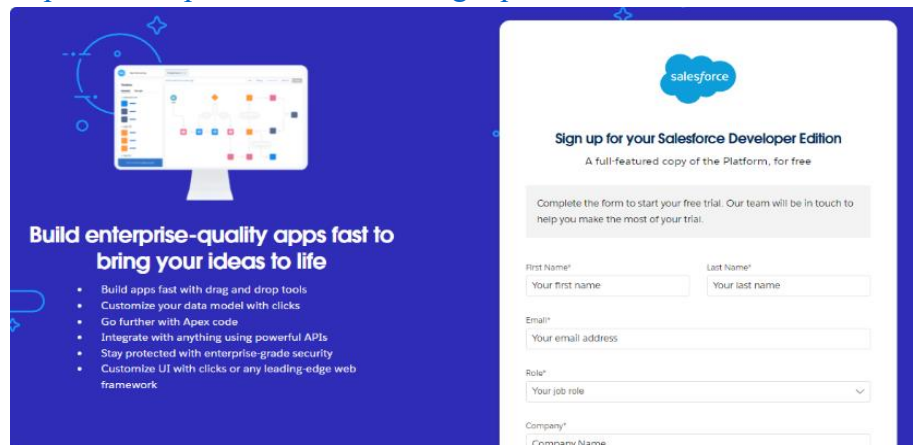


Fig: Developer edition login page.

2. Custom Object Design:

Created five custom objects with relevant fields.

Enabled features like reporting and search

Created tabs for each object.

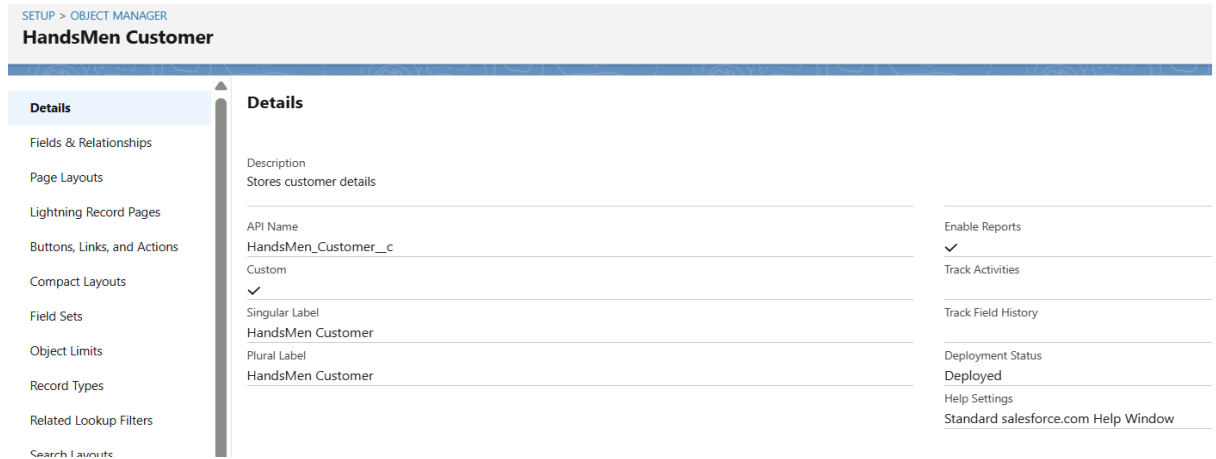


Fig: HandsMen Customer object.

3. Lightning App Configuration:

Built a custom app named HandsMen Threads.

Include tabs for customer, order, product, inventory and marketing campaign, etc.

Assigned to System Administrator.

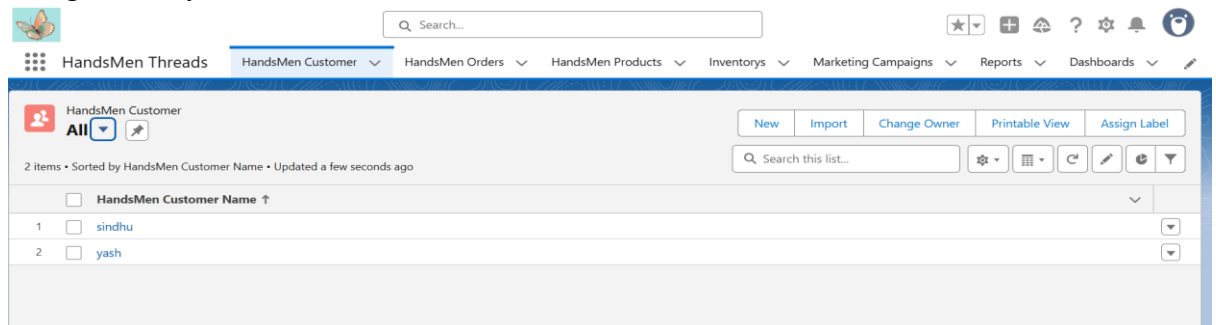


Fig: Customized HandsMen App.

4. Validation Rules:

Created validation rules for

Order: Total Amount must be > 0

Customer: Email must include “@gmail.com”

Inventory: Stock Quantity>0

Inventory Number

I -0001

Handsmen Product

Jeans

Stock Quantity

-1

Stock Status

Low Stock

This field is calculated upon save

Warehouse

Created By



SINDHU KAVALI, 7/20/2025, 11:44 PM

⊘ We hit a snag.

Review the errors on this page.

- the inventory count is never less than zero.

By

SINDHU KAVALI



Cancel

Save

Fig: Validation Rule triggered for Invalid Stock.

New HandsMen Order

* = Required In

Information

HandsMen OrderNumber

Owner



SINDHU KAVALI

Customer



sindhu

Status

Pending

Quantity

Total Amount

⊘ 0

Please Enter Correct Amount

* Customer Email

soulfulsindhu

HandsMen Product

Search Hands

⊘ We hit a snag.

Review the following fields

- [Total Amount](#)



Cancel

Save & New

Save

Fig: Validation Rule triggered for Invalid Amount.

5. Roles and Profiles:

Cloned Standard User to create a new custom profile.

Created roles like Sales Manager, Inventory Head, and Marketing Executive.

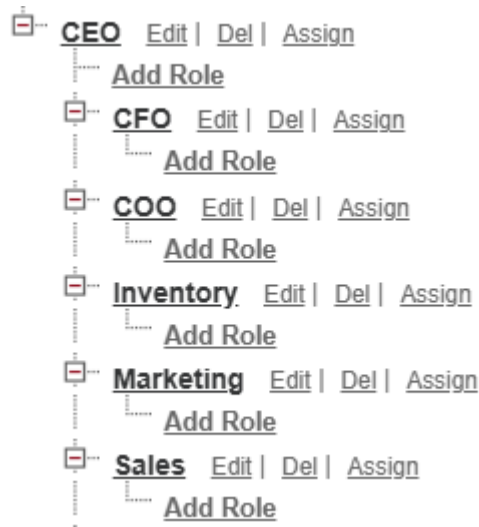


Fig: Assigned roles and reporting head.

6. User Setup:

Created user account for team members and assigned roles/profiles:

Niklaus Mikaelson – Sales

Kol Mikaelson – Inventory

Minnie Mikaelson – Marketing

User Detail [Edit](#) [Sharing](#) [Reset Password](#) [Freeze](#) [View Summary](#)

Name	Niklaus Mikaelson	Role	Sales
Alias	nmika	User License	Salesforce
Email	sindhu_kavali@smap.edu.in [Verify] i	Profile	Platform_1
Username	nmika@ex.com	Active	<input checked="" type="checkbox"/>
Nickname	mikael i	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (United States)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	i
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> i
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> i

Fig: Niklaus Mikaelson profile creation.

7. Email Templates & Alerts:

Templates for:

Order Confirmation

Low Stock Notification

Loyalty Update

Alerts Configured via Flows for respective events.

SETUP

Email Alerts

All Email Alerts

Email alerts are used to send emails from a flow or other automation.

View: All Email Alerts [Create New View](#)

A

B

C

D

E

F

G

Action	Description	Email Template Name	Object
Edit Del	Low Stock Alert	Low Stock Alert	Inventory
Edit Del	Loyalty Program Email	Loyalty Program Email	HandsMen Customer
Edit Del	Order Confirmation Email Alert	Order Confirmation Email	HandsMen Order

Fig: Email Alerts

- Automation with Flows:
 - Orde Confirmation Flow: Confirmation email is sent when status is updated to Confirmed.
 - Stock Alert Flow: Notifies when inventory falls bellow threshold.
 - Scheduled Loyalty Flow: Runs daily to adjust customer loyalty tiers.

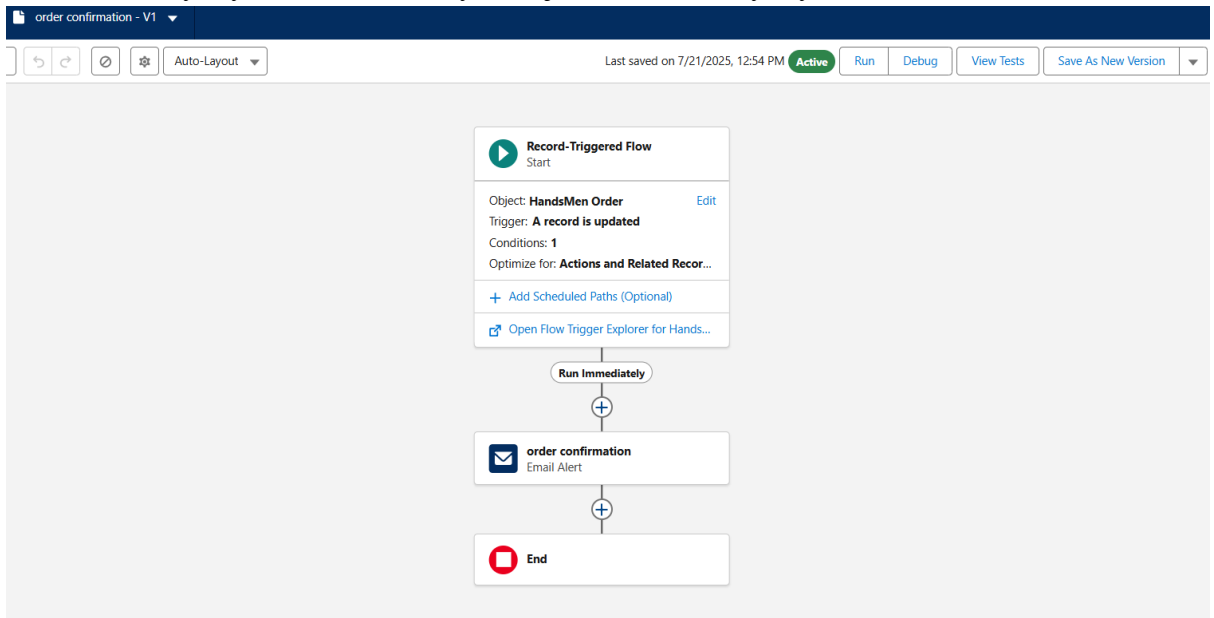


Fig: Order Confirmation Flow

- Apex Triggers:
 - Order Trigger: Calculates total price automatically.
 - Stock Trigger: Deducts stock on confirmed orders.
 - Loyalty Trigger: Updates loyalty tier based on cumulative purchases.

```

StockDeductionTrigger.apxt
Code Coverage: None API Version: 64
1 trigger StockDeductionTrigger on HandsMen_Order__c (after insert, after update) {
2     Set<Id> productIds = new Set<Id>();
3
4     for (HandsMen_Order__c order : Trigger.new) {
5         if (order.Status__c == 'Confirmed' && order.HandsMen_Product__c != null) {
6             productIds.add(order.HandsMen_Product__c);
7         }
8     }
9
10    if (productIds.isEmpty()) return;
11
12    // Query related inventories based on product
13    Map<Id, Inventory__c> inventoryMap = new Map<Id, Inventory__c>([
14        SELECT Id, Stock_Quantity__c, HandsMen_Product__c
15        FROM Inventory__c
16        WHERE HandsMen_Product__c IN :productIds]
17    );
18
19    List<Inventory__c> inventoriesToUpdate = new List<Inventory__c>();

```


Fig: Apex trigger for automatic Stock Deduction

Real-Time Scenario Overview:

1. Customer Creation:

Example: Yash Kavali registers.

System validates email and stores his records.



HandsMen Customer
yash

Related

Details


HandsMen Customer Name	yash	Owner	 SINDHU KAVALI
Email			
Phone			
Loyalty Status			
FirstName	yash		
LastName	kavali		
FullName	yash kavali		
Total Purchases			

Fig: Customer record

2. Product & Inventory Setup:

Admin adds items like Shirts and Jeans.

Stock data is recorded in Inventory.

HandsMen Threads

HandsMen Customer

HandsMen Orders

HandsMen Products

Inventories

Marketing Campaigns

Reports

Inventory

I -0001

Related

Details

Inventory Number

I -0001

HandsMen Product

[Jeans](#)

Stock Quantity

600

Stock Status

Available

Warehouse

Created By

SINDHU KAVALI

, 7/20/2025, 11:44 PM

Last Modified By

SINDHU KAVALI

, 7/22/2025, 12:13 AM

Fig: Inventory of jeans

3. Order Placement:

Yash orders 5 T-Shirts @200 each.

Order is created and total calculated automatically.

HandsMen Order

O-0015

Related

Details

HandsMen OrderNumber

O-0015

Customer

[yash](#)

Status

Confirmed

Quantity

5

Total Amount

1,000

Customer Email

soulfulsindhuv@gmail.com

HandsMen Product

[T-Shirts](#)

Owner


SINDHU KAVALI

Fig: Order placement and reflection of total amount.

4. Stock Management:

Shirt stock is decreased by 5 automatically.

Validation prevents negative inventory.

 Inventory
I -0004

Related

Details

Inventory Number


I -0004

Handsmen Product

[T-Shirts](#)

Stock Quantity

995



Stock Status

Available

Warehouse




Fig: Automatic deduction of Stock quantity reflected through apex trigger, stockdeductiontrigger.

5. Loyalty System:

Yash reaches 1000 in purchases.

Status updates to Gold (from Rs.1000).

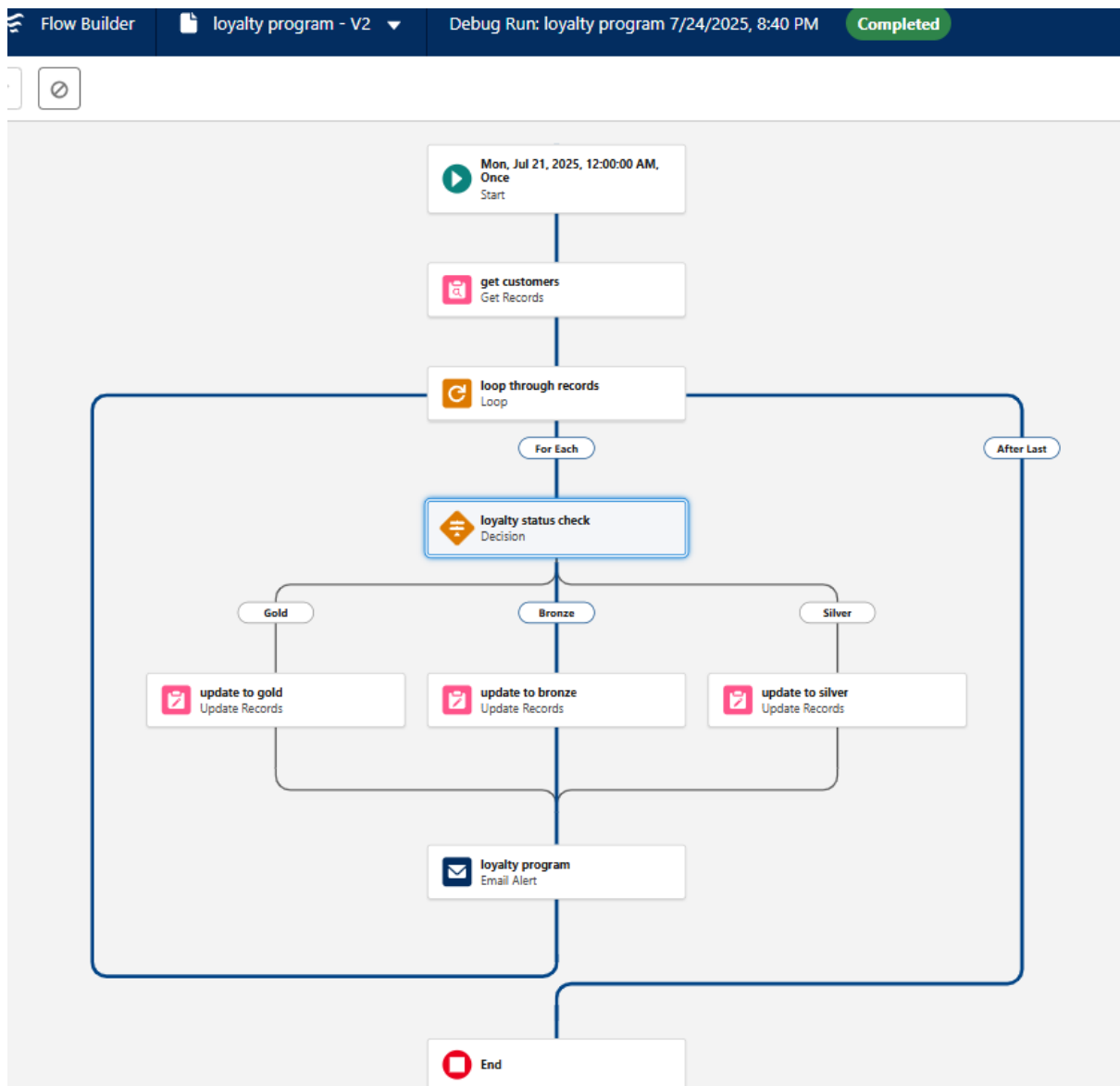


Fig: Loyalty Program Flow for updating loyalty status.

6. Notifications:

Email alert sent confirming purchase and loyalty tier.



Fig: Email Alert for Order Confirmation

Dear Inventory Manager,
This is to inform you that the stock for the following product is running low:
Product Name:
Current Stock Quantity: 4
Please take the necessary steps to restock this item immediately.
Best Regards,
Inventory Monitoring System



Fig: Email Alert for Low Stock Management.

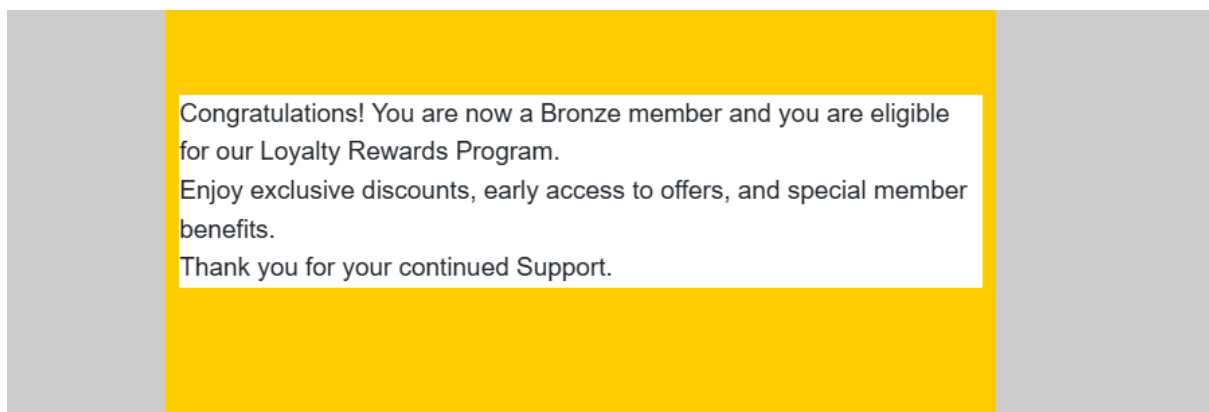


Fig: Email Alert for Loyalty Status

7. User Roles in Action:

Niklaus accesses sales data.

Kol manages stock alerts.

Conclusion:

The CRM solution for HandsMen Threads successfully automates and organizes crucial business activities. Using Salesforce's declarative and programmatic tools, the system ensures accurate data entry, streamlined operations, and rich customer engagement. Role-based access, real-time updates, and personalized communication make the system efficient and future-ready.

Future Enhancements & Scope:

Launch a Customer Portal for self-service.

Develop a mobile app using Salesforce SDK.

Build advanced reports and dashboards.

Integrate AI-based product recommendations.

Enable WhatsApp/SMS communication for customers.