

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

ABSTRACT

This document details the implementation of a customized Salesforce CRM solution for HandsMen Threads, a premium men's fashion and tailoring brand. The primary objective of this solution was to streamline business processes, improve customer engagement, and boost sales and marketing efforts.

The implemented solution involved designing a robust data model featuring five key custom objects. Business processes were automated using various Salesforce features, including Record-Triggered Flows, Scheduled Flows, Email Alerts, and Apex triggers to handle tasks such as order processing, inventory management, and marketing campaigns. Furthermore, the solution integrated different departments, such as sales, inventory, and marketing teams.

This end-to-end CRM implementation aims to improve customer experience through personalized communication, enhance customer loyalty, gain real-time insights, and promote sustainable growth on the Salesforce Platform.

OBJECTIVE

The main objective of this project is to develop and implement a customized Salesforce CRM solution for HandsMen Threads to streamline core business operations, maintain data integrity, and improve decision-making.

Specific project aims include:

- **Efficiently managing** customers, orders, products, inventory, and marketing campaigns.
- **Ensuring accurate and consistent data** entry using validation rules.
- **Enabling real-time visibility** of inventory and customer interactions.
- **Automating key business processes** to minimize manual errors.
- **Delivering 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 solution.

Custom Objects:

These are like tables in a database, created to store specific business data.

1. **Customer_c:** Stores **customer info**.
2. **Order_Item_c:** Stores **order details**.
3. **Order_c:** Stores **orders**.
4. **Product_c:** Stores **product details**.
5. **Inventory_c:** Stores **inventory records and stock levels**.

Tabs:

Tabs are used to display object data in the Salesforce UI.

For example, a tab for Product_c allows users to easily view and manage products.

Custom Apps:

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.

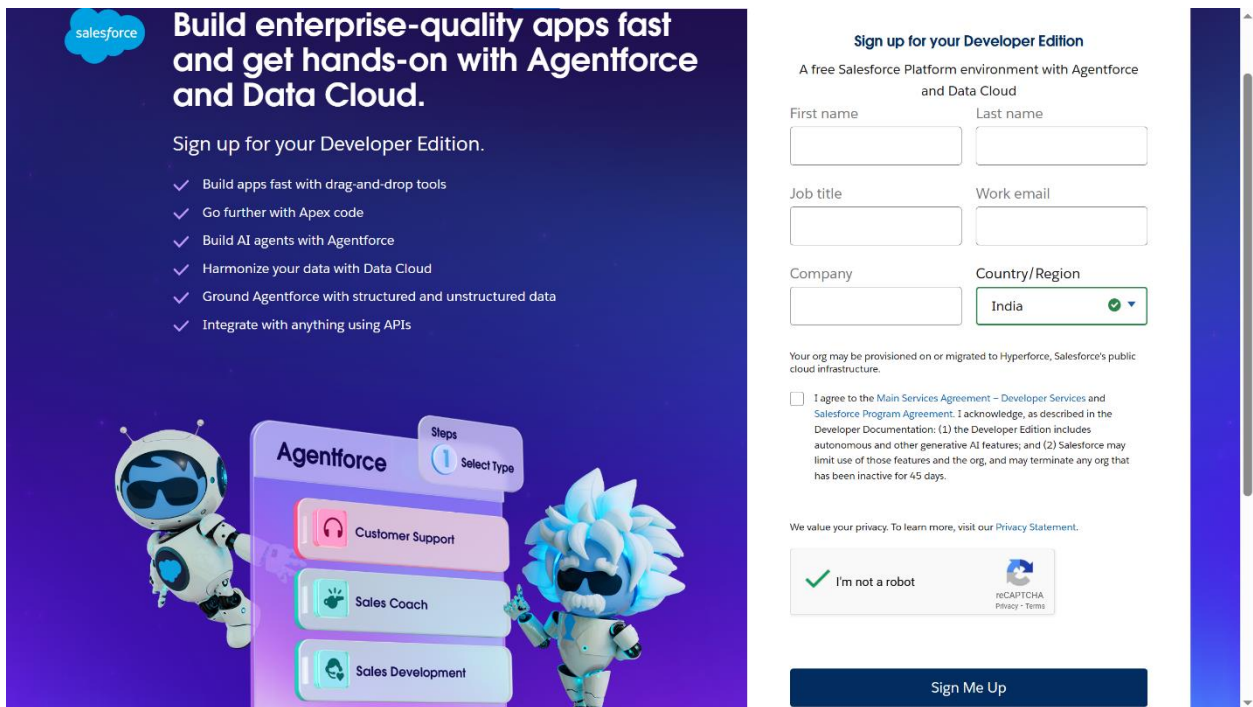
Example: Triggers

- 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://www.salesforce.com/form/developer-signup>.
- The account was verified, password set, and access was granted to the Salesforce Setup page.



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Steps

1 Select Type

- Customer Support
- Sales Coach
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Company Country/Region

Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud infrastructure.

☐ I agree to the Main Services Agreement – Developer Services and Salesforce Program Agreement. I acknowledge, as described in the Developer Documentation: (1) the Developer Edition includes autonomous and other generative AI features; and (2) Salesforce may limit use of those features and the org, and may terminate any org that has been inactive for 45 days.

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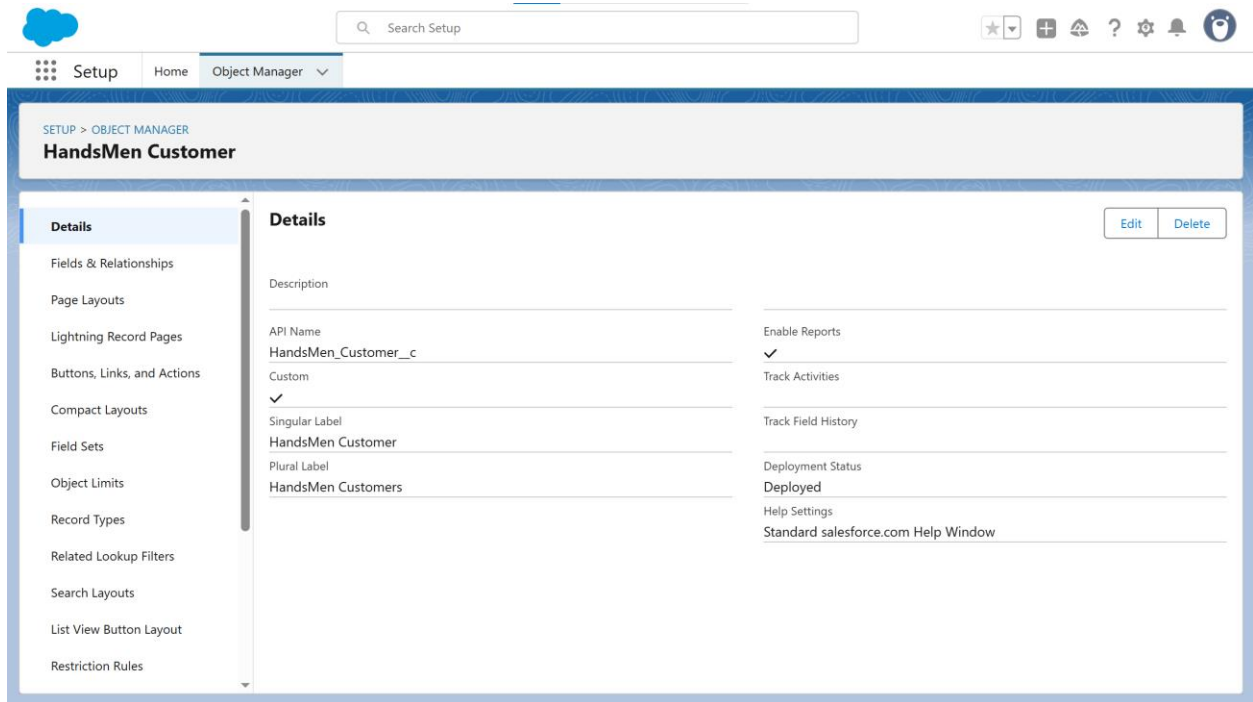
2. Custom Object Creation

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

- **HandsMen Customer** - Stores customer info like email, phone, loyalty status.
- **HandsMen 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".

The screenshot displays a web form titled "New HandsMen Customer". The form includes several input fields: "HandsMen Customer Name" (containing "james"), "Email" (containing "james"), "Phone", "Loyalty Status" (set to "--None--"), "FirstName", and "LastName". A red error message box is overlaid on the form, stating "We hit a snag." and "Review the following fields" with a list containing "Email". Below the error message, there are three buttons: "Cancel", "Save & New", and "Save". The "Email" field is highlighted with a red border and a red error message: "Enter a valid email address, such as name@email.com.".

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.

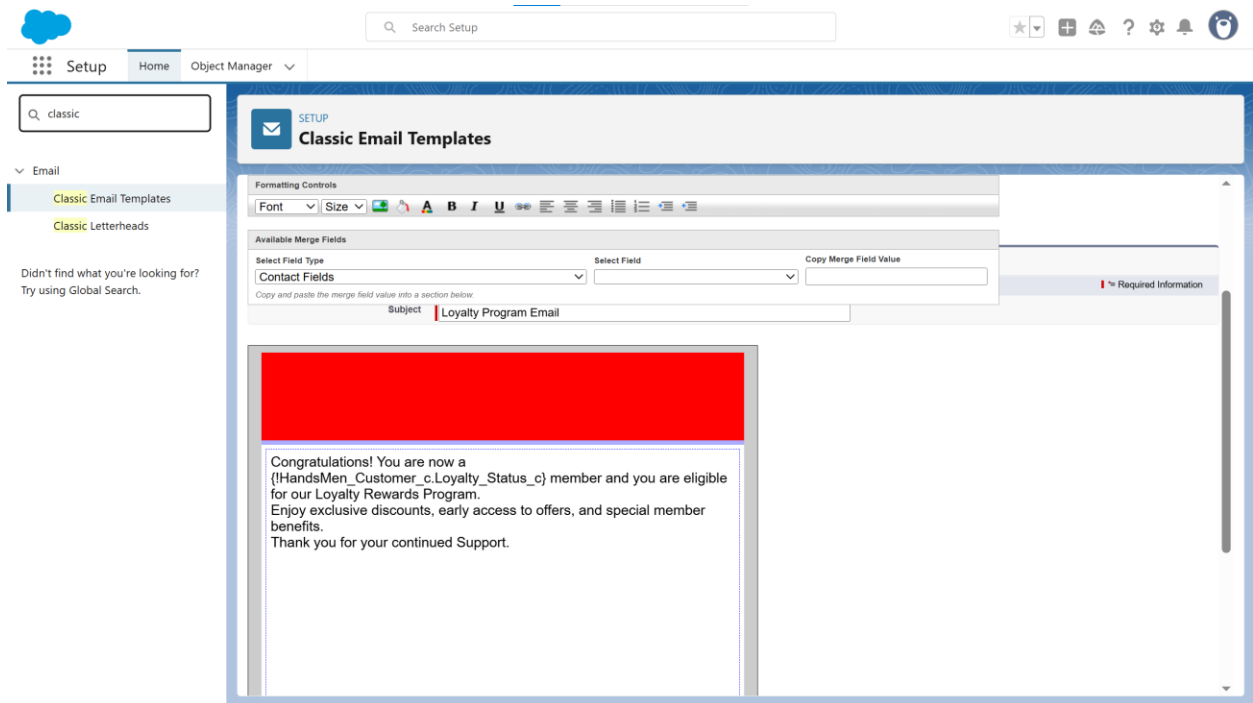
The screenshot displays the Salesforce Setup interface. On the left is a navigation menu with categories like 'Setup Home', 'ADMINISTRATION', and 'PLATFORM TOOLS'. The main content area is titled 'Users' and shows the 'User Edit' form for 'Niklaus Mikaelson'. The form is divided into two columns. The left column contains fields for 'First Name' (Niklaus), 'Last Name' (Mikaelson), 'Alias' (mik), 'Email' (gundamadarsh17@gmail.com), 'Username' (gundamadarsh1767@gmail.com), 'Nickname' (User175293627283695390), 'Title', 'Company', 'Department', and 'Division'. The right column contains fields for 'Role' (Sales), 'User License' (Salesforce), 'Profile' (Platform 1), and a list of checkboxes for various user types: 'Active' (checked), 'Marketing User', 'Offline User', 'Knowledge User', 'Flow User', 'Service Cloud User', 'Site.com Contributor User', 'Site.com Publisher User', 'WDC User', 'Data.com User Type' (set to --None--), 'Data.com Monthly Addition Limit' (300), 'Accessibility Mode (Classic Only)', 'High-Contrast Palette on Charts', 'Load Lightning Pages While Scrolling' (checked), and 'Debug Mode'.

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

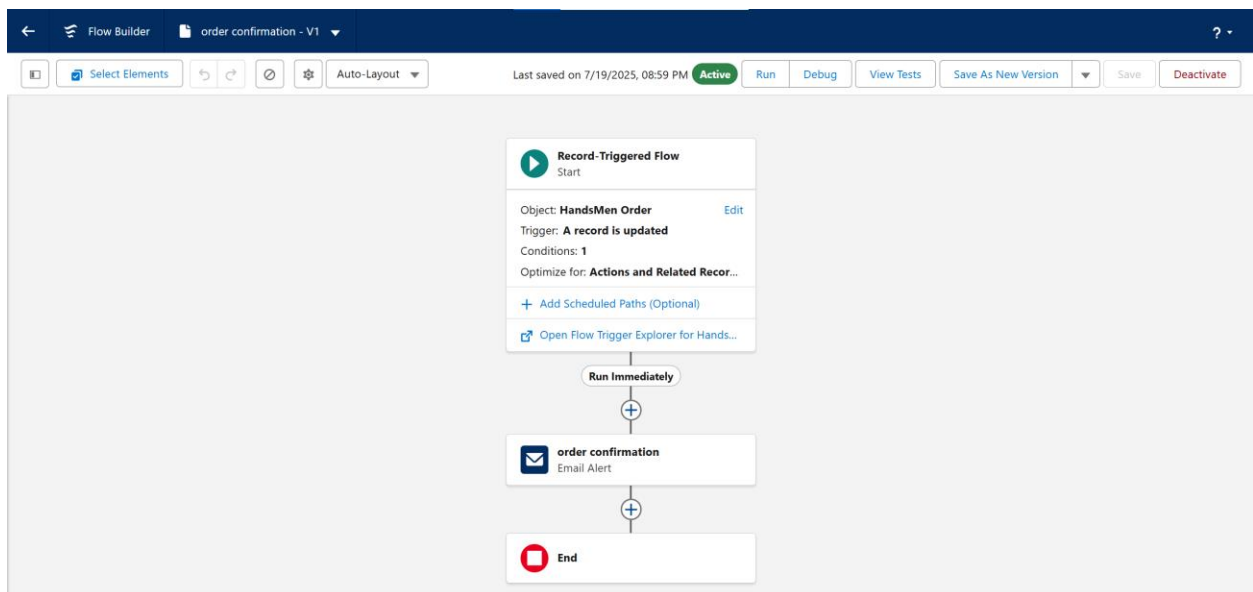
Corresponding Email Alerts were created using these templates and linked to automation flows.



8. Flow Implementations

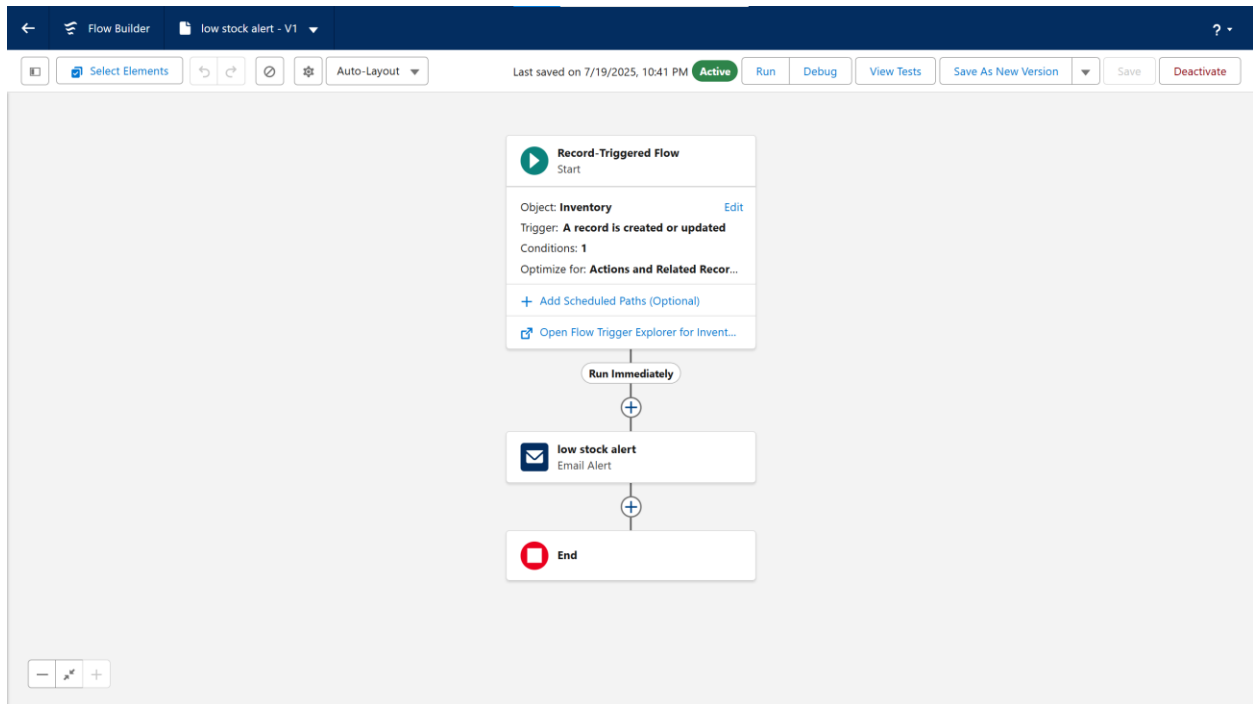
a. Order Confirmation Flow

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



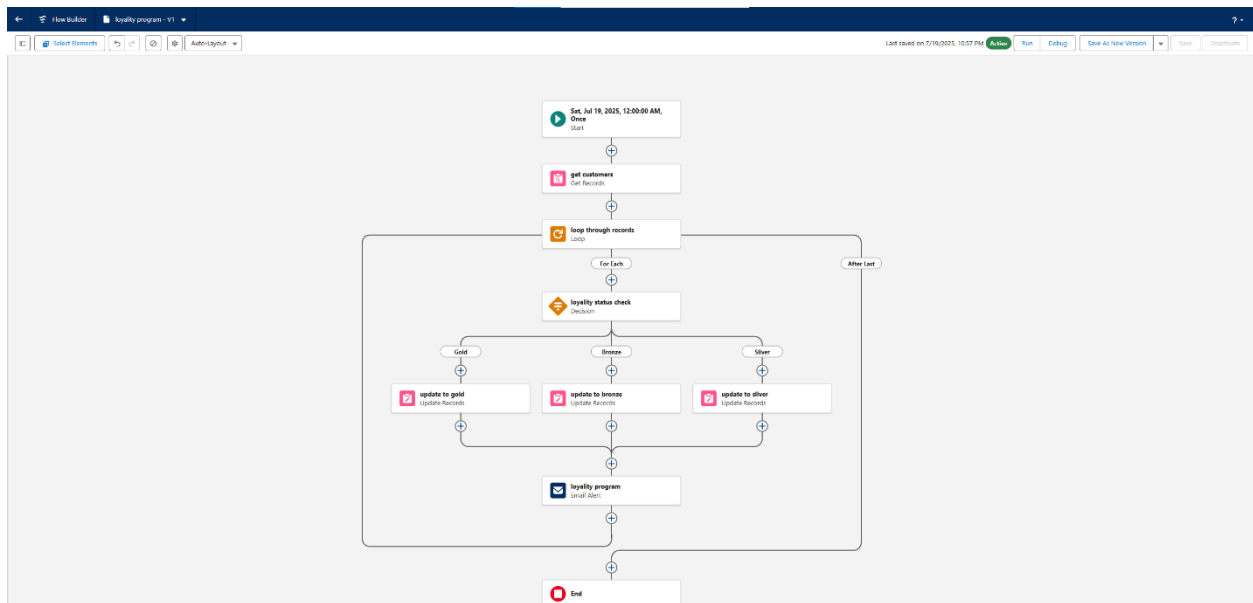
b. Stock Alert Flow

- 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 $\text{Total_Amount_c} = 2 * 500 = ₹1000$.

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 the values:
 - <₹500 = Bronze
 - ₹500 - ₹1000 = Silver
 - >₹1000 = 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 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

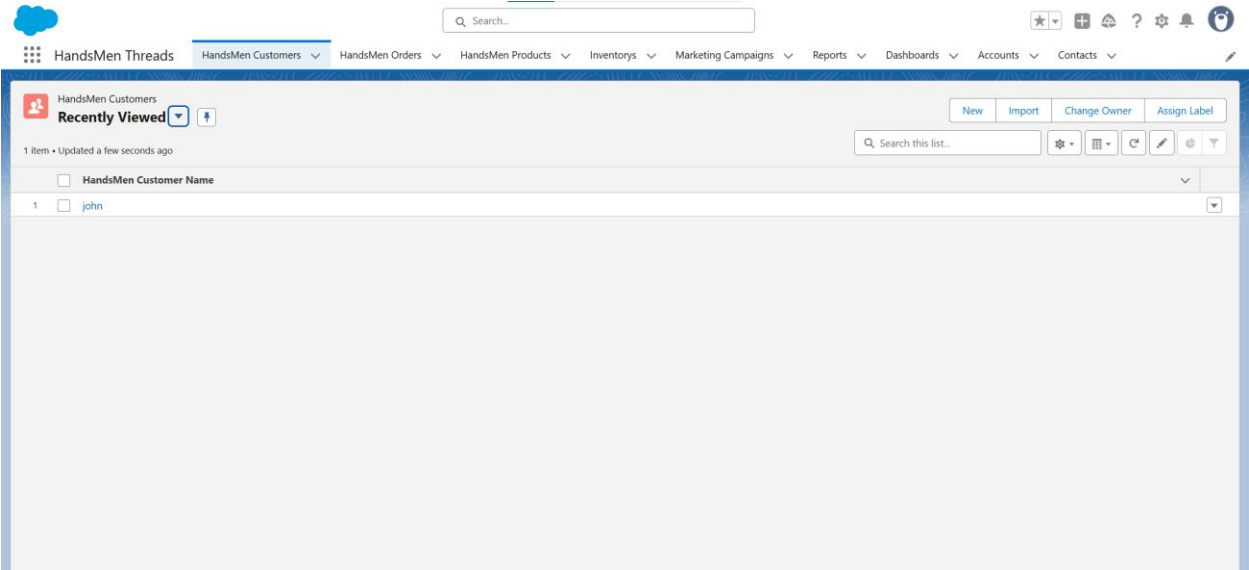


Fig: Custom App for Handsmen Threads

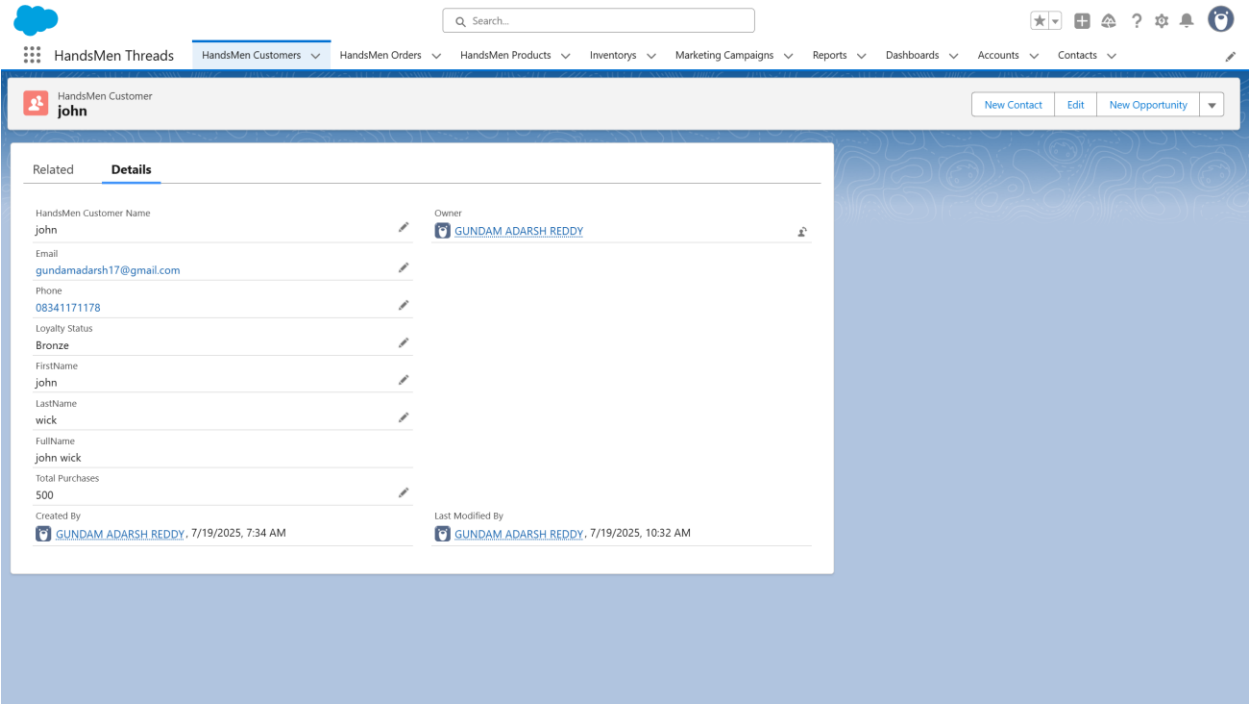


Fig: Customer Creation in Handsmen Threads

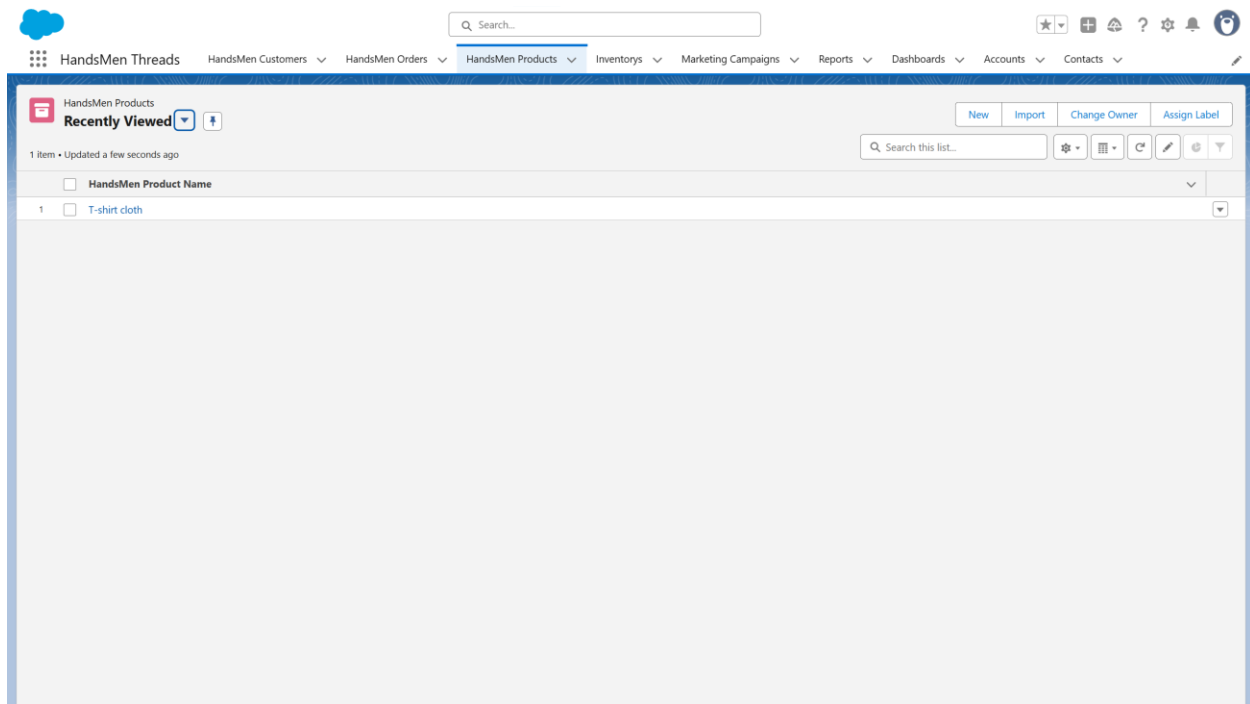


Fig: Products in Handsmen Threads

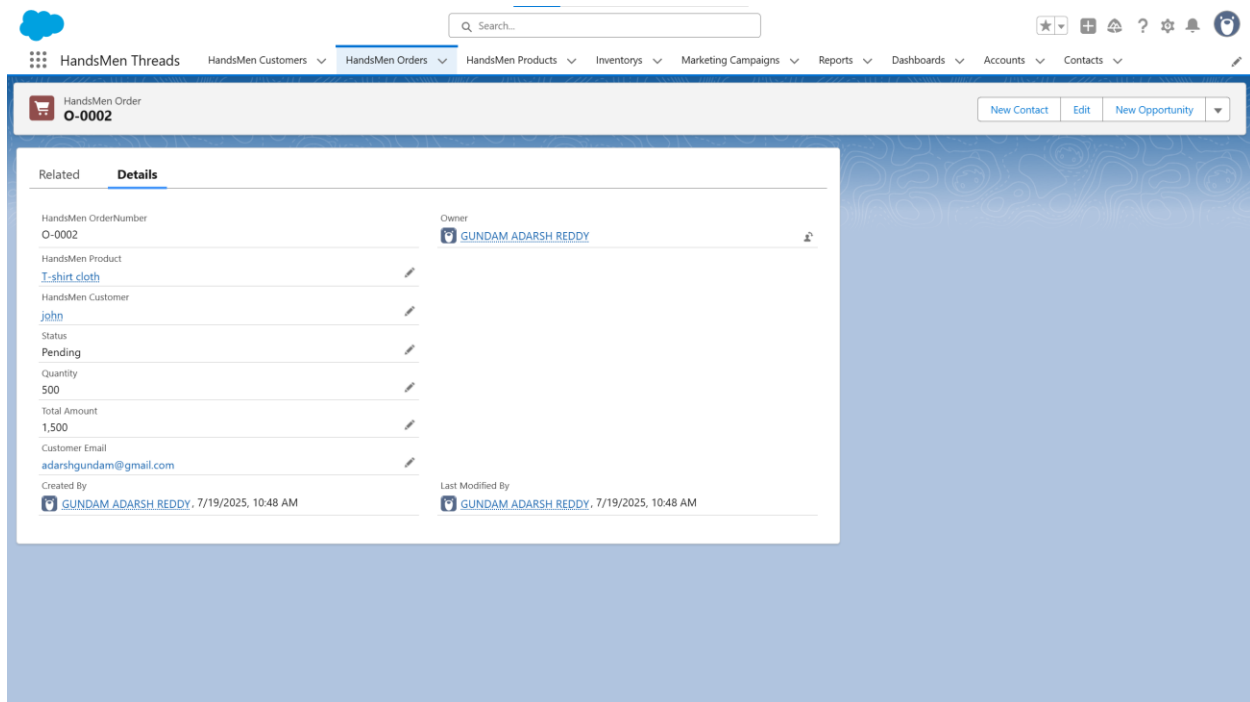


Fig: Order Confirmation

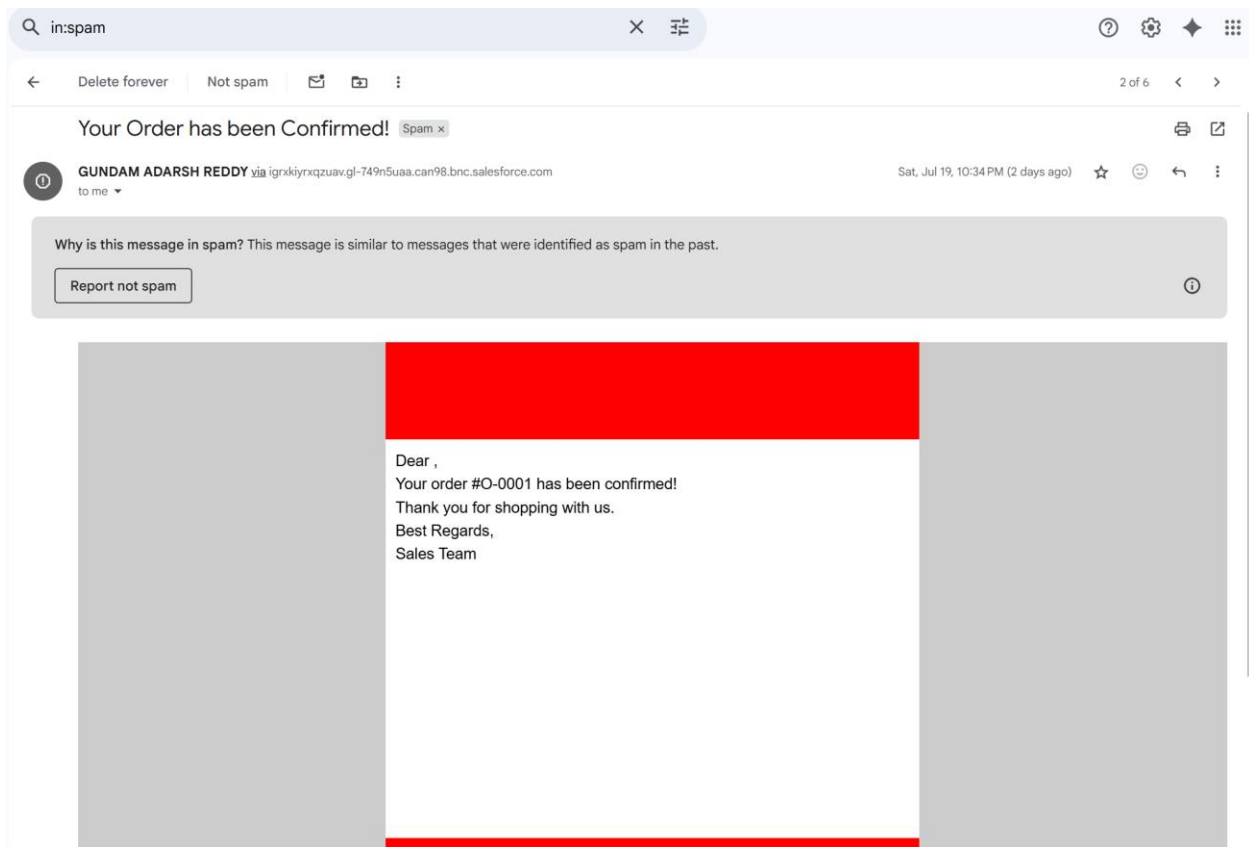


Fig: Order Confirmation Email

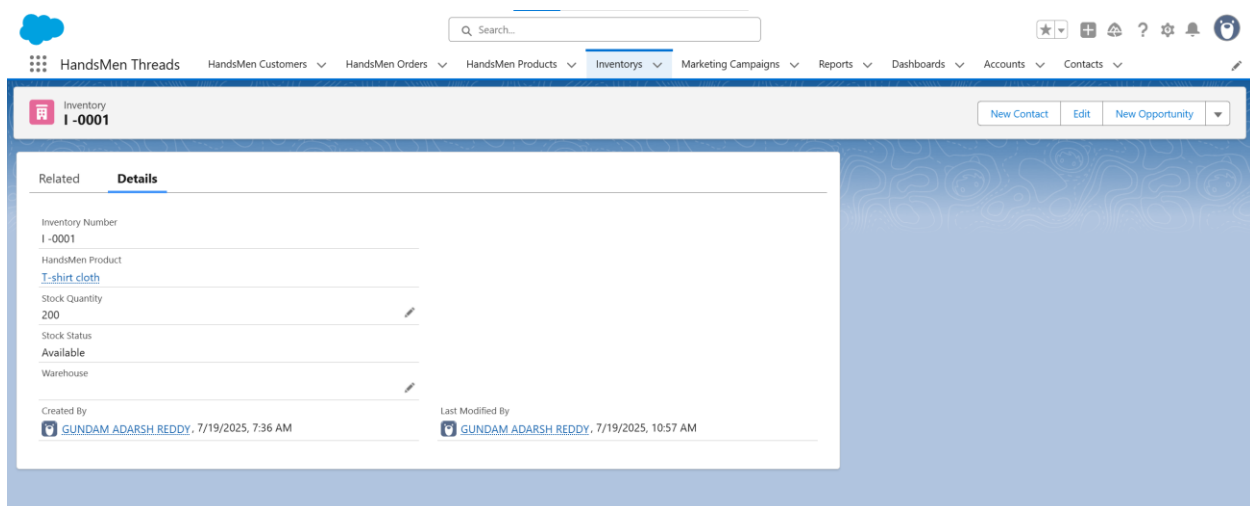


Fig: Inventory Creation

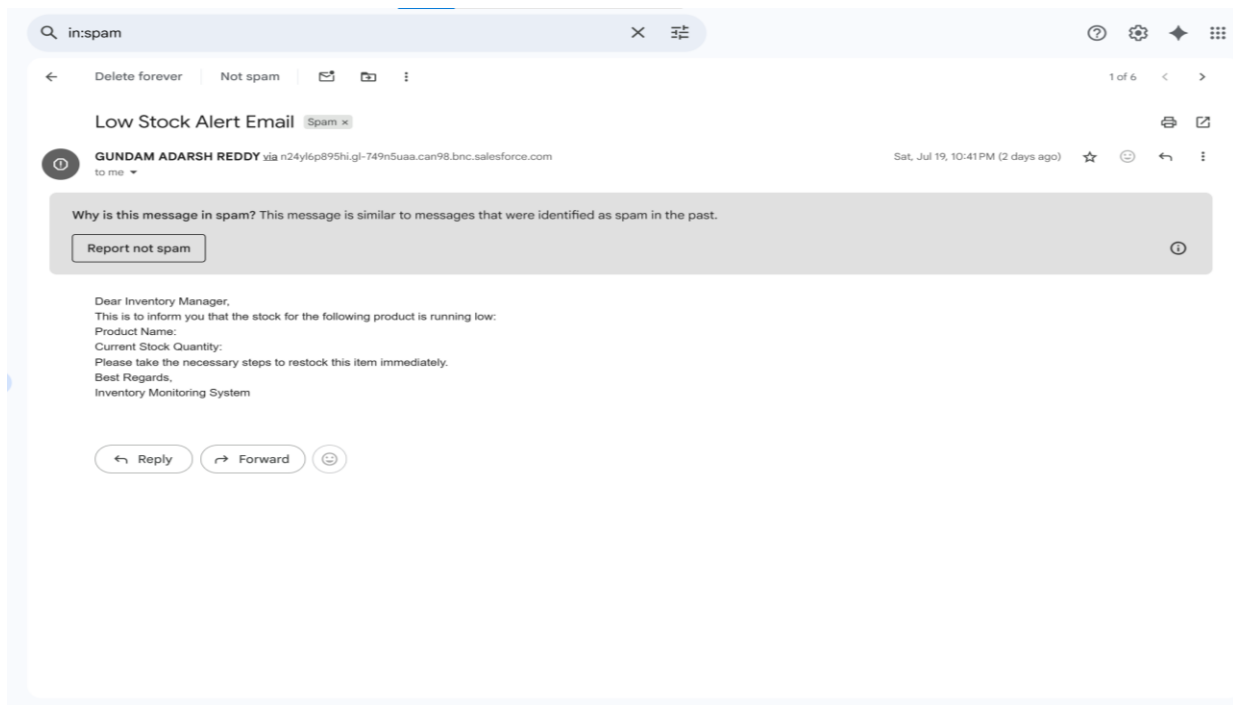


Fig: Low Stock Alert Email

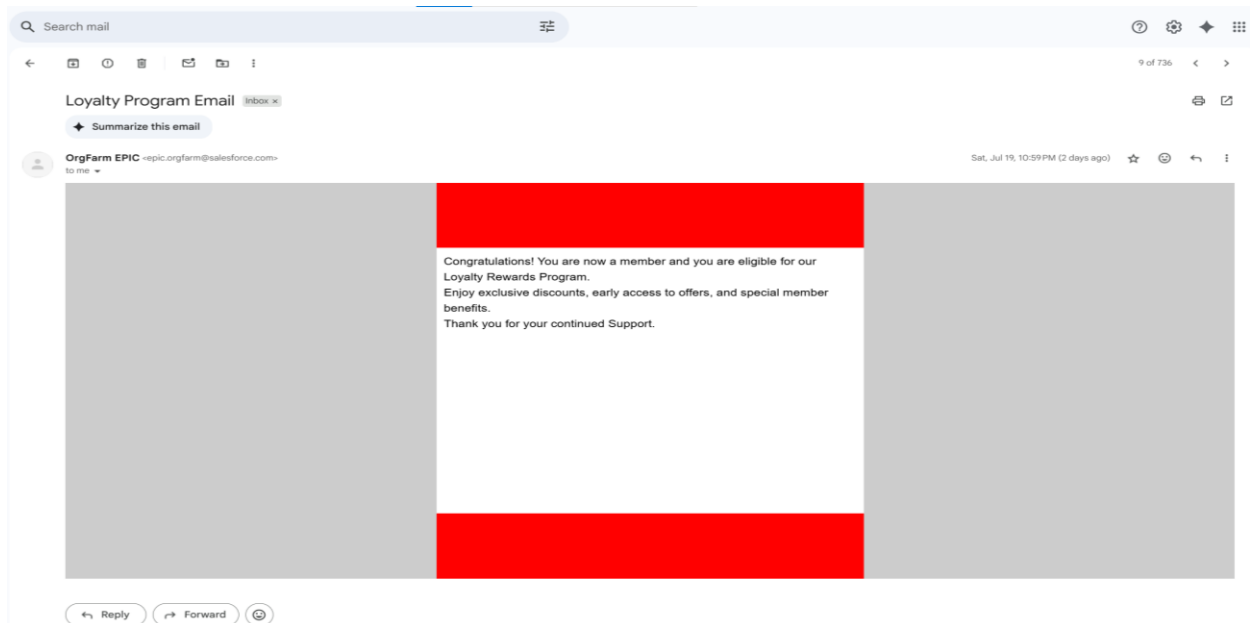


Fig : Loyalty Program Email

CONCLUSION

The HandsMen Threads CRM system built on Salesforce successfully streamlines key business processes like customer management, product cataloging, order processing, inventory tracking, and loyalty program automation. By leveraging Salesforce tools like Custom Objects, Flows, Validation Rules, Email Alerts, and Apex, the system ensures accurate data entry, real-time updates, and enhanced customer experience. Through automation and well-structured user roles, the platform minimizes manual errors, speeds up operations, and provides better insights into sales and stock.

Future Scope:-

1. Customer Portal Integration

- Build a Customer Community Portal where customers can log in, view orders, and track loyalty status.

2. Mobile App using Salesforce Mobile SDK

- Enable store staff to manage inventory and orders on the go using a mobile interface.

3. Reports & Dashboard

- Create detailed sales and inventory dashboards for management to monitor trends and performance in real-time.

4. AI-Powered Recommendations (Einstein)

- Use Salesforce Einstein to provide personalized product suggestions based on past purchases.

5. WhatsApp/SMS Integration

- Notify customers via WhatsApp or SMS about order confirmations and loyalty updates.