

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

Abstract

This project introduces the deployment of a tailored Salesforce CRM solution for HandsMen Threads, a high-end men's fashion and tailoring company. The goal was to simplify business operations, increase customer interaction, and ensure data consistency between departments.

The solution entails creating a solid data model with five main custom objects: Customer, Order, Product, Inventory, and Marketing Campaign. Record-Triggered Flows, Scheduled Flows, Email Alerts, and Apex were utilized to automate business processes for order confirmations, loyalty status, and proactive stock alerts.

To provide clean and accurate data, validation rules were implemented and a security model based on roles was applied to the Sales, Inventory, and Marketing teams. The solution has a scheduled batch job through Apex to update low inventory levels.

This end-to-end CRM deployment enhances customer experience through personalized engagement, optimizes operations via automation, and sets a scalable ground for future business expansion utilizing the Salesforce Platform.

Objective

The main goal of this project is to create and implement a tailored Salesforce CRM solution for HandsMen Threads. This will help simplify business operations, keep data accurate, and improve customer satisfaction.

By building a centralized system to manage customers, orders, products, inventory, and marketing campaigns, the project aims to:

- Automate important processes like order confirmations, loyalty status updates, and stock alerts
- Ensure accurate and consistent data entry with validation rules
- Provide real-time visibility of inventory and customer interactions
- Improve team coordination through role-based access control
- Offer personalized customer experiences with targeted communication and loyalty programs

Technology Description

1. Salesforce Platform

Salesforce is the backbone of the HandsMen Threads application. It provides a strong, scalable, and customizable cloud platform. It manages every part of the bespoke tailoring lifecycle, from client onboarding to order tracking and personalized styling; all of this is centralized in a complete CRM system. The platform offers top-level security, scalability, and integration features that meet the needs of a high-end fashion brand.

2. Custom Objects

Custom Objects are the main business entities unique to HandsMen Threads. They store essential business data beyond standard Salesforce objects. These include ClientProfile__c for detailed customer measurements and style preferences, Order__c for tracking tailoring orders with custom fields for fabric selection and fitting dates, and other specialized objects. Custom objects allow for modeling complex business relationships and storing industry-specific data that standard objects cannot handle.

3. Tabs

Tabs act as navigation points for users to access custom and standard objects within the Salesforce interface. In HandsMen Threads, custom tabs like Clients, Orders, and Styling Tips give tailors and customer service reps direct access to frequently used data. This simplified navigation boosts productivity by reducing clicks, ensuring quick access to essential business information during daily operations.

4. Custom Apps

The HandsMen Threads Custom App combines all relevant objects, tabs, reports, dashboards, and automation tools into one workspace experience. It ensures that tailoring, sales, and support team members work in a cohesive environment that reflects the company's sophistication and branding. Custom apps provide role-specific interfaces that improve user experience and operational efficiency.

5. Profiles

Profiles control access to objects and fields for users, defining what data and functions each user can access. They establish baseline permissions for different user types and form the basis for security. Profiles ensure that sensitive business information is only accessible to authorized personnel, all while keeping operations efficient across departments.

6. Roles

Roles define the organizational structure and determine record access levels based on the company's reporting hierarchy. They control data visibility through role hierarchy. Managers can

access their team's records while keeping data secure. Roles work with sharing rules to provide appropriate data access based on organizational relationships and business needs.

7. Permission Sets

Permission Sets offer flexible access beyond standard Profile limits. They let administrators grant extra permissions to specific users without changing their base Profile. They provide detailed control over features and data access, allowing tailored permission structures. Permission Sets are especially useful for giving temporary access or specialized permissions to users needing extra functionality for specific business processes.

8. Validation Rules

Validation rules ensure data quality and business logic by blocking invalid data entry when creating or modifying records. For example, they prevent order submission if measurements are not verified or ensure that email formats are correct. These rules keep data accurate across the system, reducing manual data cleanup efforts, while ensuring consistent adherence to business processes.

9. Email Templates

Email Templates ensure consistent and professional communication with customers and internal stakeholders through various business processes. HandsMen Threads uses them for welcome emails after client registration, order confirmations, and loyalty program updates. Templates help maintain brand consistency while automating routine communications, saving time and ensuring professional customer interactions.

10. Email Alerts

Email Alerts are automated notifications linked to specific business events and processes. Examples include alerts when order status changes to "Ready for Pickup" or reminder emails sent 24 hours before scheduled fittings. These alerts keep clients engaged and informed without needing manual follow-ups, enhancing customer service efficiency and satisfaction.

11. Flows

Flows automate complex, multi-step business processes within the tailoring lifecycle. They reduce manual work and ensure process consistency. They handle order confirmations, stock alerts, and loyalty status updates through visual workflow automation. Flows offer strong automation capabilities that can execute complex business logic while remaining user-friendly for configuration and maintenance.

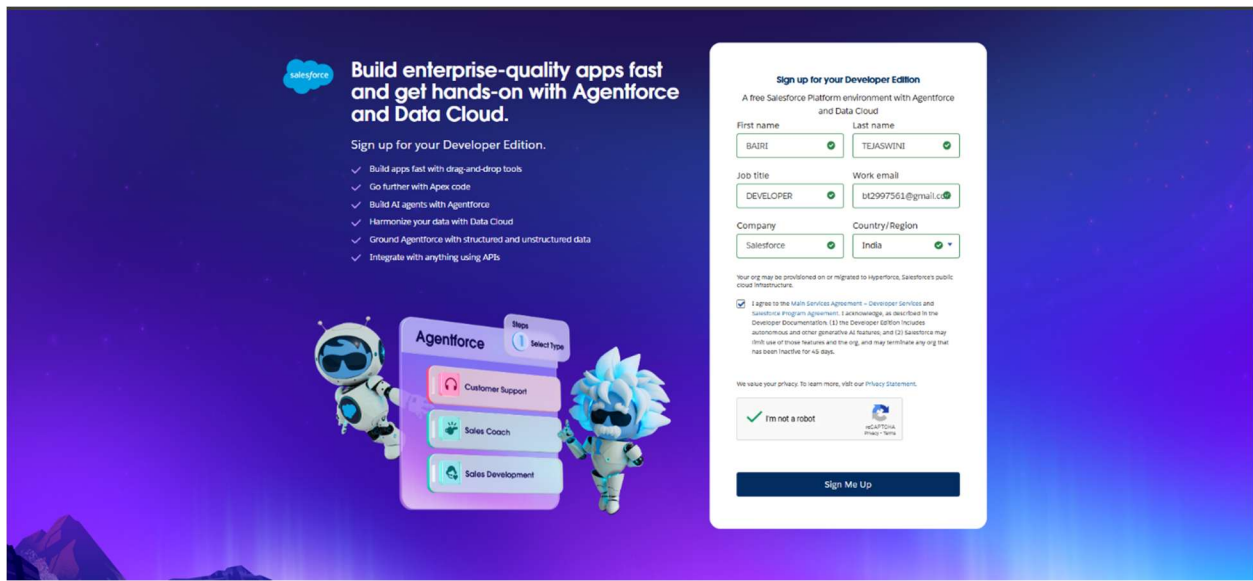
12. Apex

Apex code provides custom business logic and advanced functionality where point-and-click tools fall short. Apex enables sophisticated business automation and integration features that enhance Salesforce's native capabilities.

Detailed Execution of Project Phases

Developer Org Setup

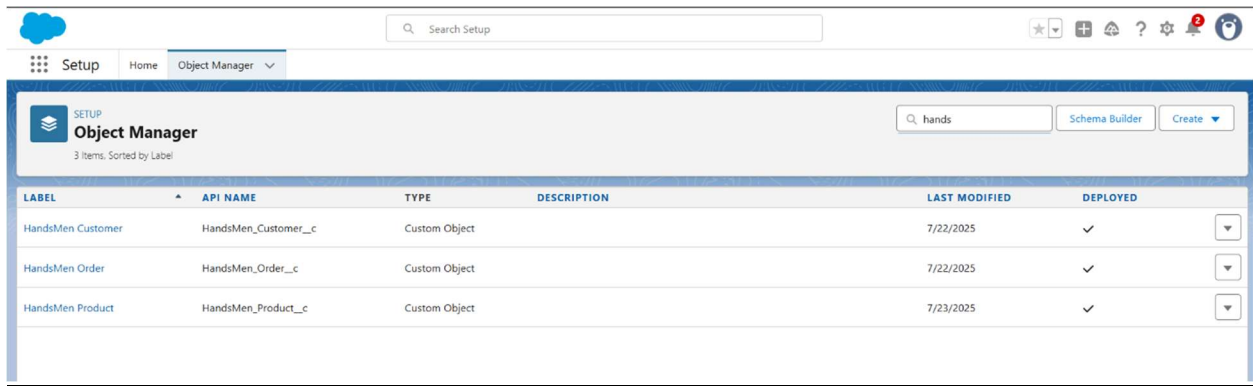
- Created a Salesforce Developer Org using <https://www.salesforce.com/form/developer-signup/>
- Verified the account, set password, and gained access to the Salesforce Setup page
- Configured initial organizational settings and security parameters



Custom Object Creation

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

- **HandsMen Customer** – Stores customer information including email, phone, and loyalty status
- **HandsMen Product** – Stores product catalog details like SKU, price, and stock information
- **HandsMen Order** – Stores orders placed by customers, including quantity and total amounts
- **Inventory** – Tracks stock quantity and warehouse location details
- **Marketing Campaign** – Stores promotional campaign information and scheduling data



SETUP Object Manager
3 Items. Sorted by Label

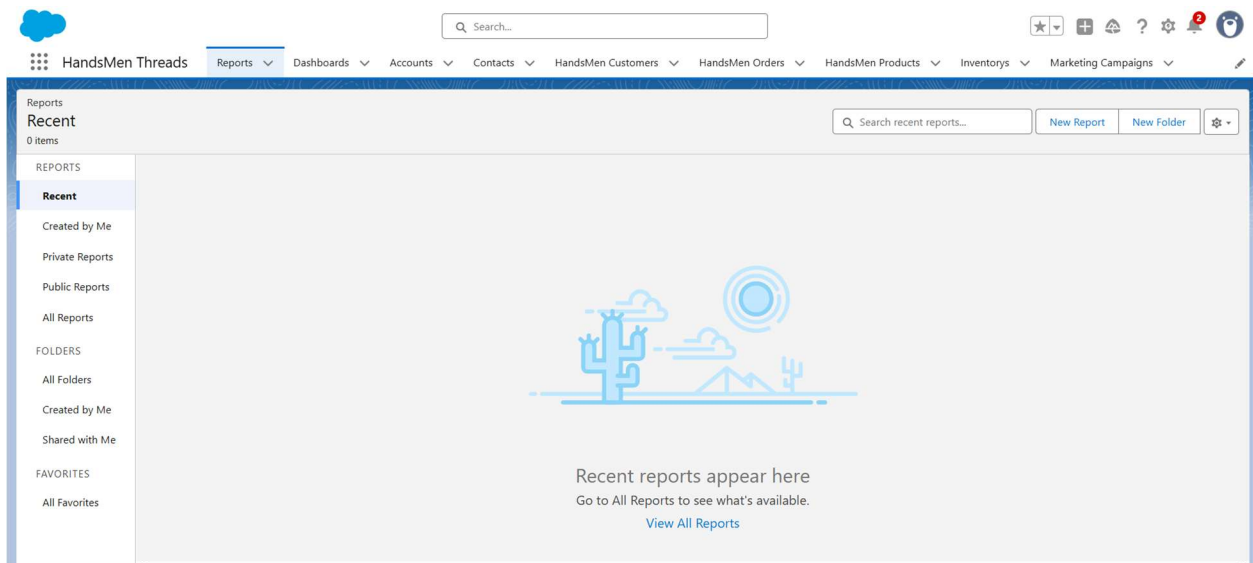
LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
HandsMen Customer	HandsMen_Customer__c	Custom Object		7/22/2025	✓
HandsMen Order	HandsMen_Order__c	Custom Object		7/22/2025	✓
HandsMen Product	HandsMen_Product__c	Custom Object		7/23/2025	✓

Steps followed:

- Navigated to Setup → Object Manager → Create → Custom Object
- Provided label, name, and enabled reports for each object
- Saved and created corresponding Tabs for each object

Creating the Lightning App

- Created a custom Lightning app named "HandsMen Threads"
- Included tabs: HandsMen Customer, Order, Product, Inventory, Campaign, Reports
- Assigned to the System Administrator Profile for initial setup and testing



Validation Rules

To ensure accurate data and enforce business logic, the following validation rules were implemented:

- **Order Object:** Prevents saving if Total_Amount__c <= 0

- Error Message: "Please enter correct amount"
- **Customer Object:** Validates email contains @gmail.com
 - Error Message: "Please fill correct gmail"

The screenshot shows a Salesforce user profile form titled "Information". The form contains several fields: "HandsMen Customer Name" (filled with "Tejaswini Bairi"), "Email" (filled with "bt2997561@xyz.com"), "Phone" (empty), "Loyalty Status" (dropdown menu showing "--None--"), "FirstName" (filled with "Tejaswini"), "LastName" (filled with "Bairi"), and "Total Purchases" (empty). To the right of the form, the "Owner" is listed as "BAIRI TEJASWINI" with a profile picture icon. A red error message box is overlaid on the form, stating "We hit a snag." and "Review the errors on this page." with a bullet point: "Please fill Correct Gmail". At the bottom of the form, there are three buttons: "Cancel", "Save & New", and "Save".

User Role & Profile Setup

- Cloned the Standard User profile to create "Platform 1" profile
- Added access to necessary custom objects and fields
- Created departmental roles:
 - Sales Manager
 - Inventory Manager
 - Marketing Team

User Creation

Created users in Salesforce with appropriate role and profile assignments:

- Assigned users to specific departments based on their responsibilities

- Configured user permissions and access levels according to business requirements

The screenshot shows the 'Users' setup page in Salesforce. The 'General Information' tab is active, displaying fields for user details. The user's name is Niklaus Mikaelson, with email address bt299756145@gmail.com. The role is set to 'Sales' and the user license is 'Salesforce'. The profile is 'Platform 1'. The user is active and has the 'Salesforce CRM Content User' checkbox checked. The 'Data.com User Type' is set to '--None--'.

Email Template & Alerts

Created three comprehensive email templates:

- **Order Confirmation** – Sent when order status = confirmed
- **Low Stock Alert** – Sent when inventory < 5 units
- **Loyalty Program Email** – Sent when loyalty status changes

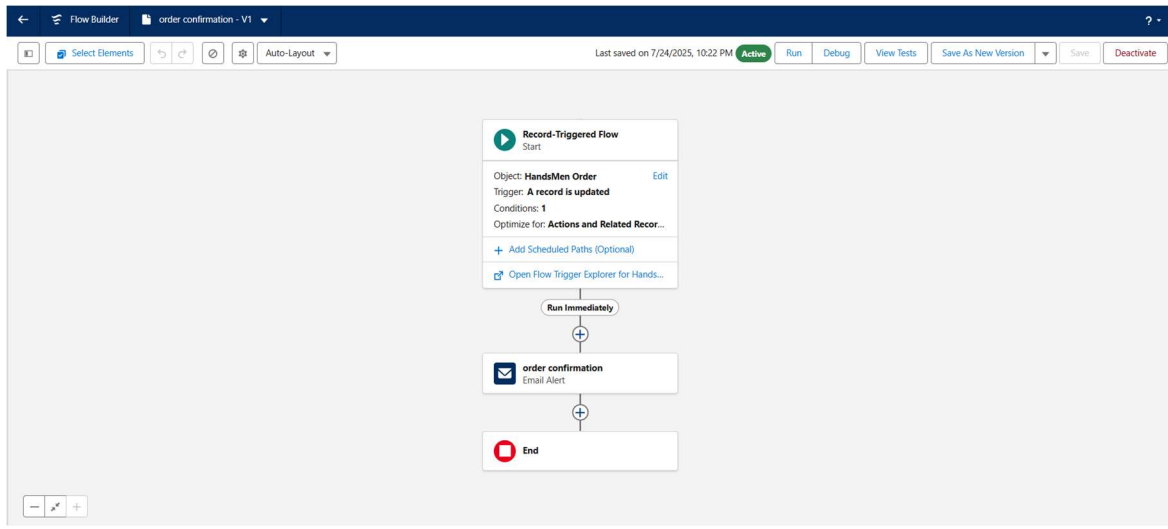
Corresponding Email Alerts were created using these templates and linked to automation flows.

The screenshot shows the 'Classic Email Templates' page in Salesforce. The 'Order Confirmation Email' template is selected. The 'Email Template Detail' section shows the template's name, unique name, and other properties. The 'Email Template' section shows the subject line 'Your Order has been Confirmed!' and the HTML preview, which includes a red header and a message from the Sales Team.

Flow Implementation

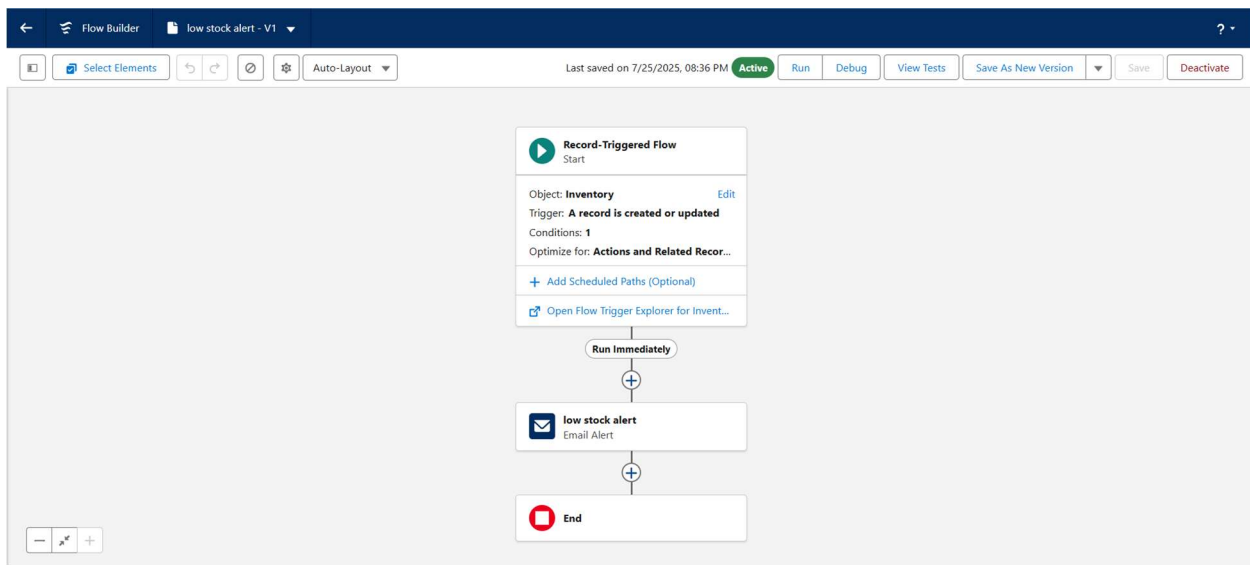
Order Confirmation Flow

- Triggered when an order status is updated to "Confirmed"
- Automatically sends order confirmation email to the related customer
- Updates internal tracking systems for order processing



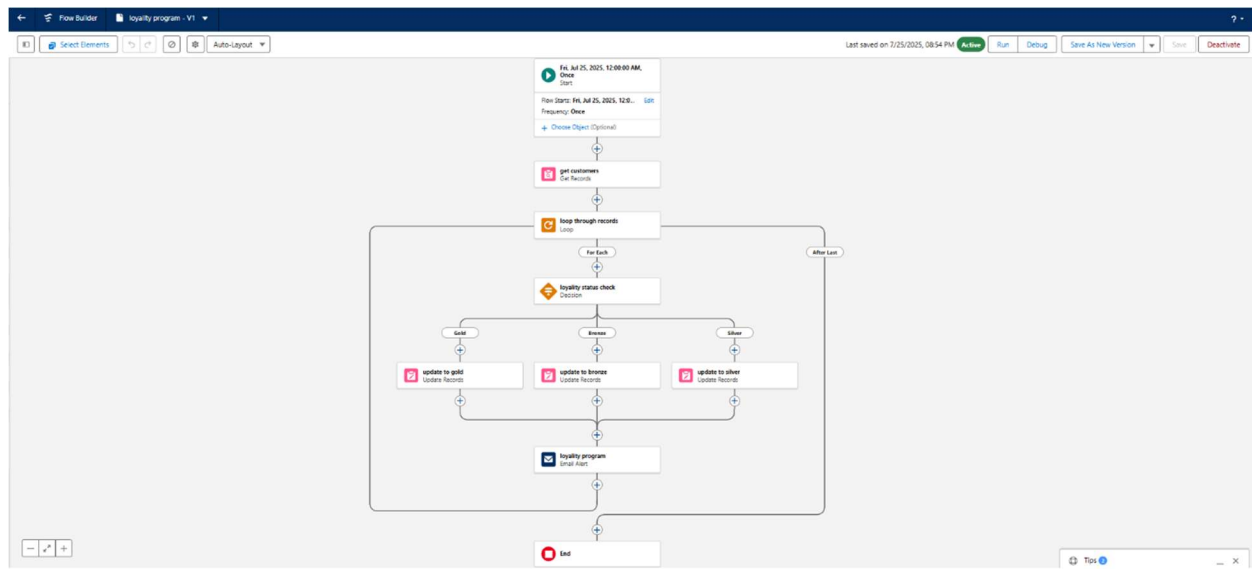
Low Stock Alert Flow

- Triggered when inventory stock drops below 5 units
- Sends low stock email alerts to Inventory Manager
- Initiates procurement processes for inventory replenishment



Scheduled Flow: Loyalty Update

- Runs daily at midnight for systematic processing
- Loops through all customers and updates loyalty status based on total purchases
- Maintains accurate loyalty program membership across the customer base



Apex Triggers

- **Order Total Trigger:** Auto-calculates total amount based on quantity and unit price
- **Stock Deduction Trigger:** Reduces inventory stock when orders are placed
- **Loyalty Status Trigger:** Updates customer loyalty status based on total purchase amounts

Project Explanation with Real-World Example

Customer Registration Process

A customer, Elijah Mikaelson, visits the store or website to explore premium men's fashion options. In Salesforce, a comprehensive record is created in the Customer object containing his name, phone number, email address, and initial preferences. The validation rule automatically ensures the email format is valid, requiring @gmail.com domain for consistency and communication reliability.

Product Setup and Catalog Management

The system administrator adds premium products like designer shirts, tailored jeans, and accessories into the Product__c object. Each product contains detailed information including pricing, fabric details, sizing options, and style characteristics. Corresponding inventory records

are created to manage stock levels, warehouse locations, and replenishment schedules for these high-end fashion items.

Order Placement and Processing

Elijah decides to purchase 2 premium shirts, each priced at ₹2,500, creating a significant transaction. A new Order record is automatically created in Salesforce, capturing all transaction details. The Apex Trigger immediately calculates the `Total_Amount__c` as $2 \times ₹2,500 = ₹5,000$, ensuring accurate financial tracking and eliminating manual calculation errors.

Inventory Management and Updates

As soon as Elijah's order is confirmed, the system automatically processes inventory changes. The Apex trigger on Inventory reduces the shirt stock by 2 units, maintaining real-time inventory accuracy. The validation rule ensures stock levels never go below zero, preventing overselling and maintaining inventory integrity across all channels.

Loyalty Program Management

With Elijah's total purchase now at ₹5,000, the system automatically evaluates his loyalty status using predefined criteria:

- **Bronze Level:** < ₹2,500 in total purchases
- **Silver Level:** ₹2,500 - ₹10,000 in total purchases
- **Gold Level:** > ₹10,000 in total purchases

Based on his ₹5,000 purchase total, Elijah automatically qualifies for Silver membership status with associated benefits and privileges.

Automated Email Communications

When the order is placed and loyalty status is updated, the integrated Flow and Email Alert system automatically triggers personalized communications. Elijah receives a professional email stating: "Thank you for your purchase! Your order has been confirmed and your loyalty status is now Silver, unlocking exclusive benefits and early access to new collections."

User Management and Role-Based Access

The system supports multiple users with appropriate access levels:

- **Niklaus Mikaelson** - Sales Role with Platform 1 Profile (customer interaction and order management)
- **Kol Mikaelson** - Inventory Role with Platform 1 Profile (stock management and procurement)

Each user has tailored access to relevant data and functionality based on their departmental responsibilities.

Screenshots

The screenshot shows the 'HandsMen Threads' application interface. The top navigation bar includes a search bar and various icons. The main menu on the left lists 'HandsMen Threads', 'Reports', 'Dashboards', 'Accounts', 'Contacts', 'HandsMen Customers', 'HandsMen Orders', 'HandsMen Products', 'Inventories', and 'Marketing Campaigns'. The 'HandsMen Customers' tab is selected, displaying the details for a customer named 'Tejaswini Bairi'. The details form includes fields for 'HandsMen Customer Name', 'Email', 'Phone', 'Loyalty Status', 'FirstName', 'LastName', 'FullName', and 'Total Purchases'. The 'Owner' field is set to 'BAIRI TEJASWINI'. The 'Created By' and 'Last Modified By' fields both show 'BAIRI TEJASWINI' with a timestamp of '7/25/2025, 10:22 PM'. Action buttons for 'New Contact', 'Edit', and 'New Opportunity' are visible in the top right corner.

Fig: Customer Creation In HandsMen Threads

The screenshot shows the 'HandsMen Customers' list page. The top navigation bar is the same as the previous screenshot. The main menu on the left is the same. The 'HandsMen Customers' tab is selected, displaying a list of customers. The list has a header 'HandsMen Customer Name' and a search bar 'Search this list...'. The list contains two items: 'Tejaswini Bairi' and 'john'. The 'Tejaswini Bairi' row is highlighted. The list is updated 'a few seconds ago'. Action buttons for 'New', 'Import', 'Change Owner', and 'Assign Label' are visible in the top right corner.

	HandsMen Customer Name	
1	Tejaswini Bairi	
2	john	

Fig: Customers in HandsMen Threads

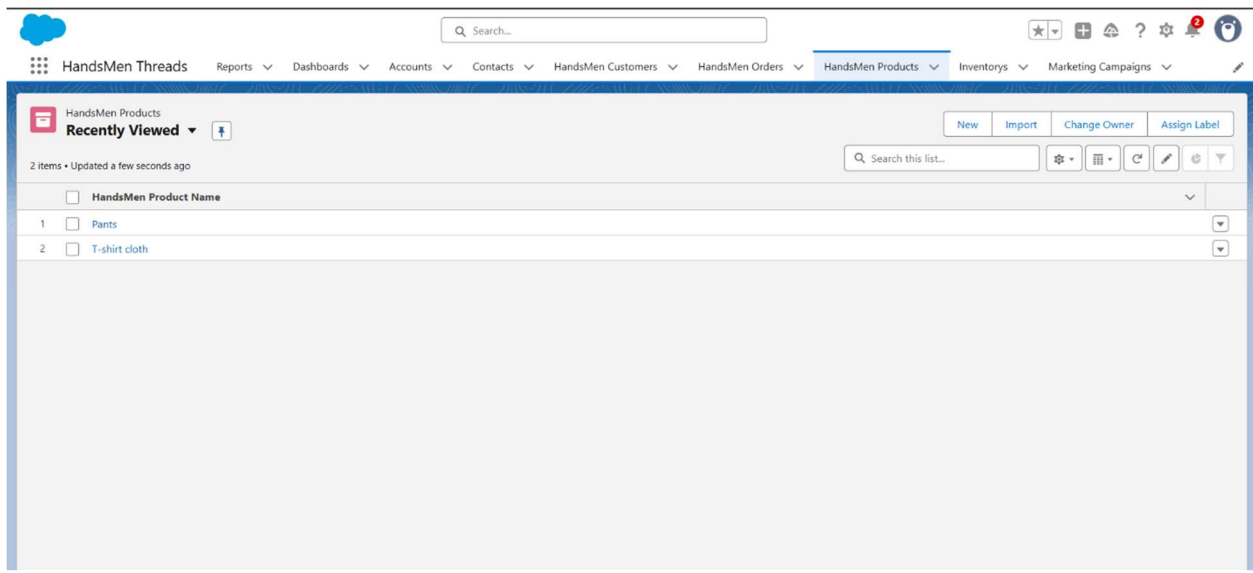


Fig: Products in HandsMen Thread

New Inventory

* = Required Information

Information

Inventory Number

* HandsMen Product

T-shirt cloth

Stock Quantity

15

Warehouse

Cancel

Save & New

Save

Fig: Inventory Creation

New HandsMen Order

* = Required Information

Information

HandsMen OrderNumber

HandsMen Customer

Tejaswini Bairi
✕

Status

Confirmed
▼

Quantity

20

Total Amount

60

HandsMen Product

T-shirt cloth
✕

* Customer Email

bt2997561@gmail.com

Owner

BAIRI TEJASWINI

Cancel

Save & New

Save

Fig:HandsMen Order Creation

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☰ HandsMen Threads
 Reports ▾ Dashboards ▾ Accounts ▾ Contacts ▾ HandsMen Customers ▾ **HandsMen Orders ▾**
HandsMen Products ▾ Inventoris ▾ Marketing Campaigns ▾

New Contact

Edit

New Opportunity ▾

Related

Details

HandsMen OrderNumber

O-0006

HandsMen Customer

[Tejaswini Bairi](#)

Status

Confirmed

Quantity

20

Total Amount

60

HandsMen Product

[T-shirt cloth](#)

Customer Email

bt2997561@gmail.com

Created By

BAIRI TEJASWINI, 7/25/2025, 10:35 PM

Owner

BAIRI TEJASWINI
👤

Last Modified By

BAIRI TEJASWINI, 7/25/2025, 10:45 PM

Fig:Order Connfirmation

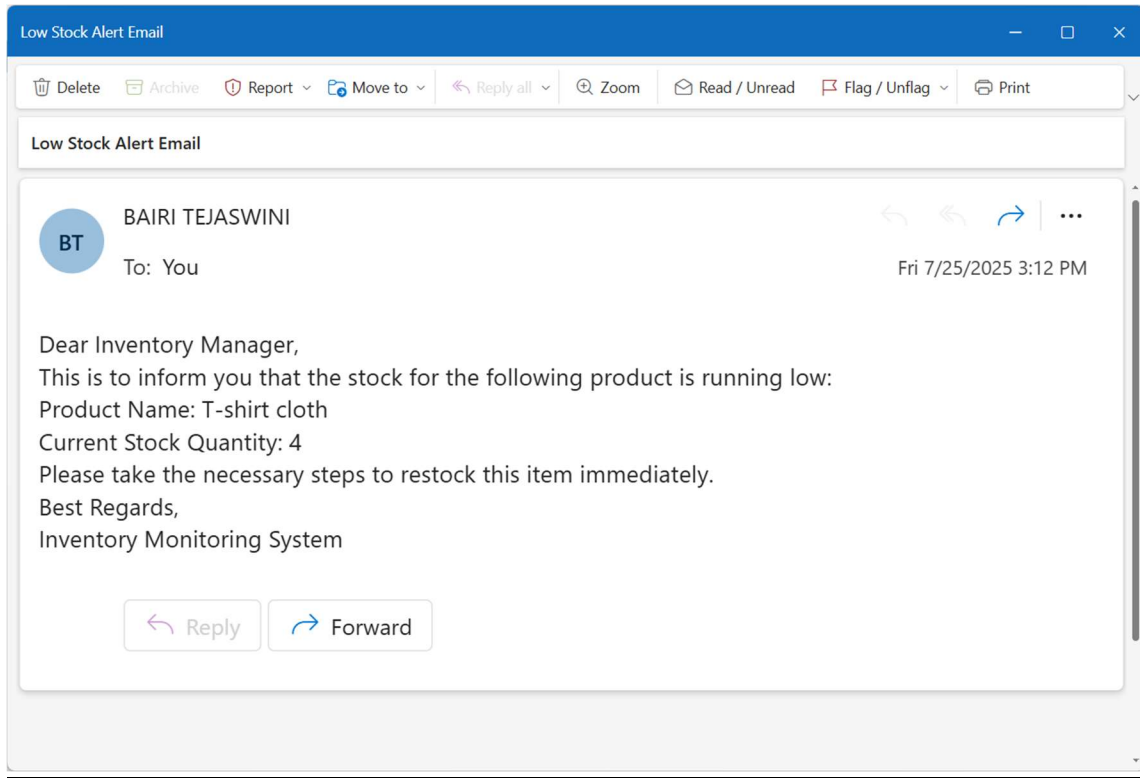


Fig: Low Stock Alert Email

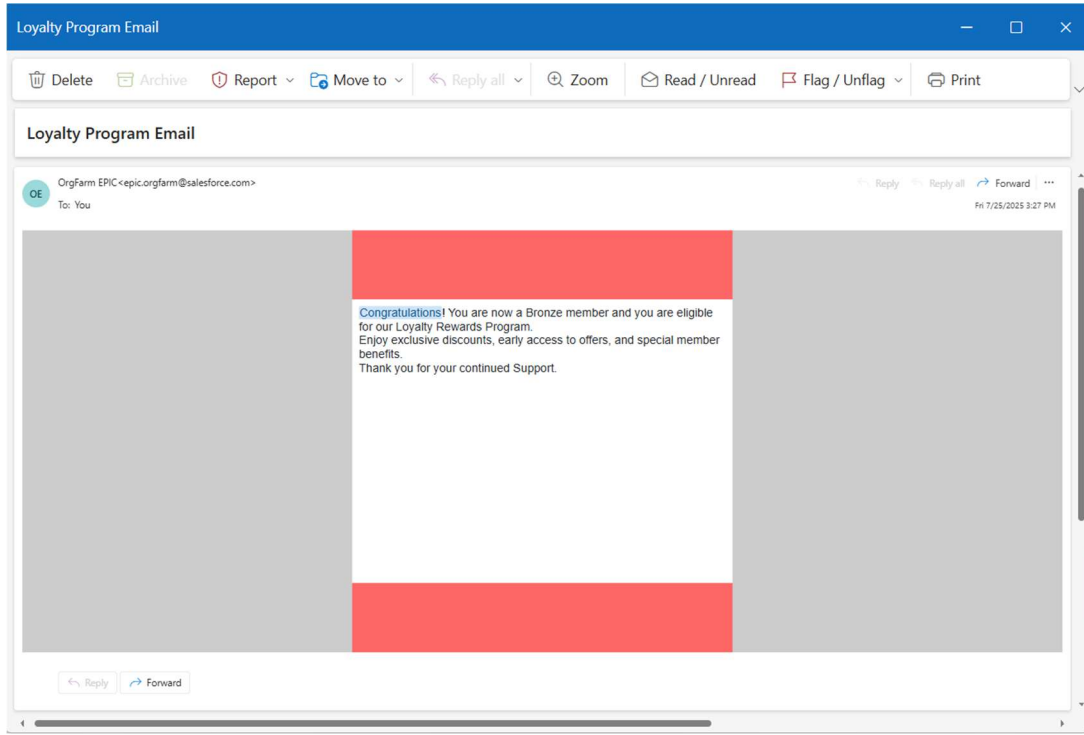


Fig:Loyalty Program Email

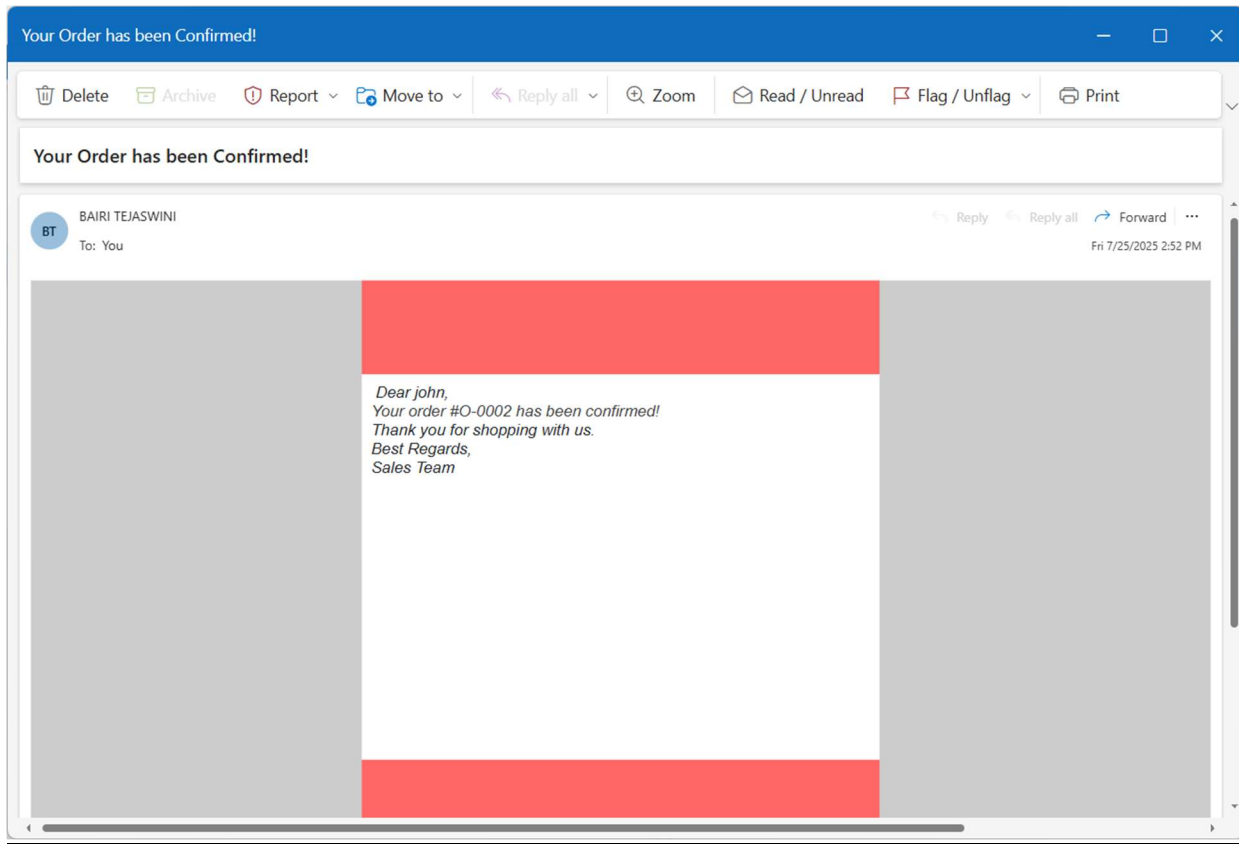


Fig:Order Confirmation Email

Conclusion

The HandsMen Threads CRM application based on Salesforce effectively automates key business processes such as customer administration, product cataloging, order handling, inventory management, and loyalty program processing. Using powerful Salesforce features such as Custom Objects, Flows, Validation Rules, Email Alerts, and Apex development, the application provides proper data entry, real-time business updates, and improved delivery of customer experience.

With thorough automation and soundly designed user role management, the platform substantially reduces human errors, speeds up business processes, and offers insightful information about sales performance and inventory management. The solution shows how current CRM technology can enhance a high-end fashion brand's operational efficiency while preserving the high-end customer experience luxury retail demands.

Future Scope

1. Customer Portal Integration

Build a Customer Community Portal where clients can log in securely. They can view their order history, track the status of their orders in real-time, monitor loyalty points and benefits, and access exclusive member content and early product previews.

2. Mobile App Development using Salesforce Mobile SDK

Allow store staff to manage inventory, process orders, and access customer information while on the go using a mobile interface. This will improve field operations and provide flexibility for trunk shows and off-site customer consultations.

3. Detailed Reports & Dashboards

Create detailed sales analytics, inventory management dashboards, and insights into customer behavior. This will help management monitor business trends, performance metrics, and growth opportunities in real-time with interactive visualizations.

4. AI-Powered Recommendations (Einstein)

Use Salesforce Einstein AI to offer personalized product recommendations based on each customer's purchase history, style preferences, and seasonal trends. This will improve the personal shopping experience and boost sales conversion rates.

5. WhatsApp/SMS Integration

Develop multi-channel communication options to notify customers through WhatsApp and SMS about order confirmations, fitting appointments, loyalty updates, and exclusive offers. This will give customers their preferred communication channels for better engagement.