

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

## **ABSTRACT**

This project presents the implementation of a customized Salesforce CRM solution for HandsMen Threads, a premium men's fashion and tailoring brand. The objective was to streamline business operations, enhance customer engagement, and maintain data integrity across departments.

The solution involves designing a robust data model featuring five key custom objects: Customer, Order, Product, Inventory, and Marketing Campaign. Business processes were automated using Record-Triggered Flows, Scheduled Flows, Email Alerts, and Apex to handle order confirmations, loyalty status updates, and proactive stock alerts.

To ensure clean and reliable data, validation rules were established, and a role-based security model was implemented for the Sales, Inventory, and Marketing teams. The solution also includes a scheduled batch job using Apex to update low stock quantities.

This end-to-end CRM implementation improves customer experience through personalized communication, ensures operational efficiency with automation, and lays a scalable foundation for future business growth using 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 enhance customer satisfaction.

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

- **Automate key processes** such as order confirmations, loyalty status updates, and stock alerts.
- **Ensure accurate and consistent data** entry using validation rules.
- **Enable real-time visibility** of inventory and customer interactions.
- **Improv internal team coordination** through role-based access control.
- **Deliver 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 solutions.

## **Custom Objects:-**

Objects in Salesforce are like tables in a database. Custom Objects are created to store specific data.

Example:

- Customer\_\_c - Stores customer info
- Product\_\_c - Stores product details
- Order\_\_c - Stores orders

## **Tabs:-**

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

Example: A tab for Product\_\_c allows users to easily view and manage products.

## **Custom App:-**

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.

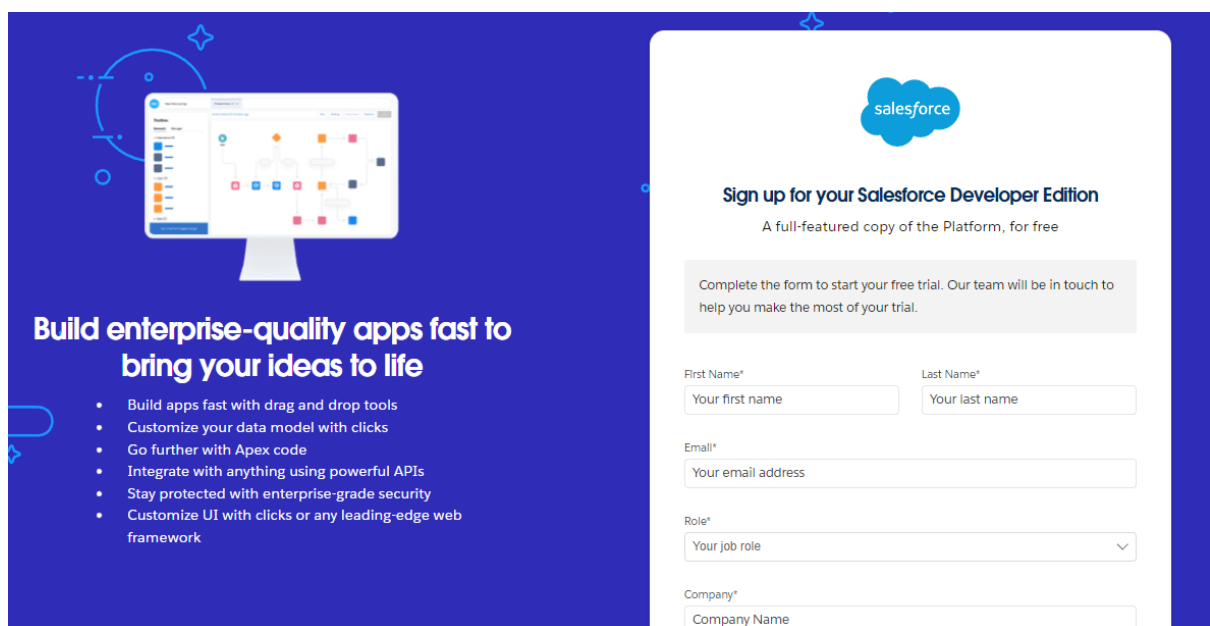
Example Triggers:

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



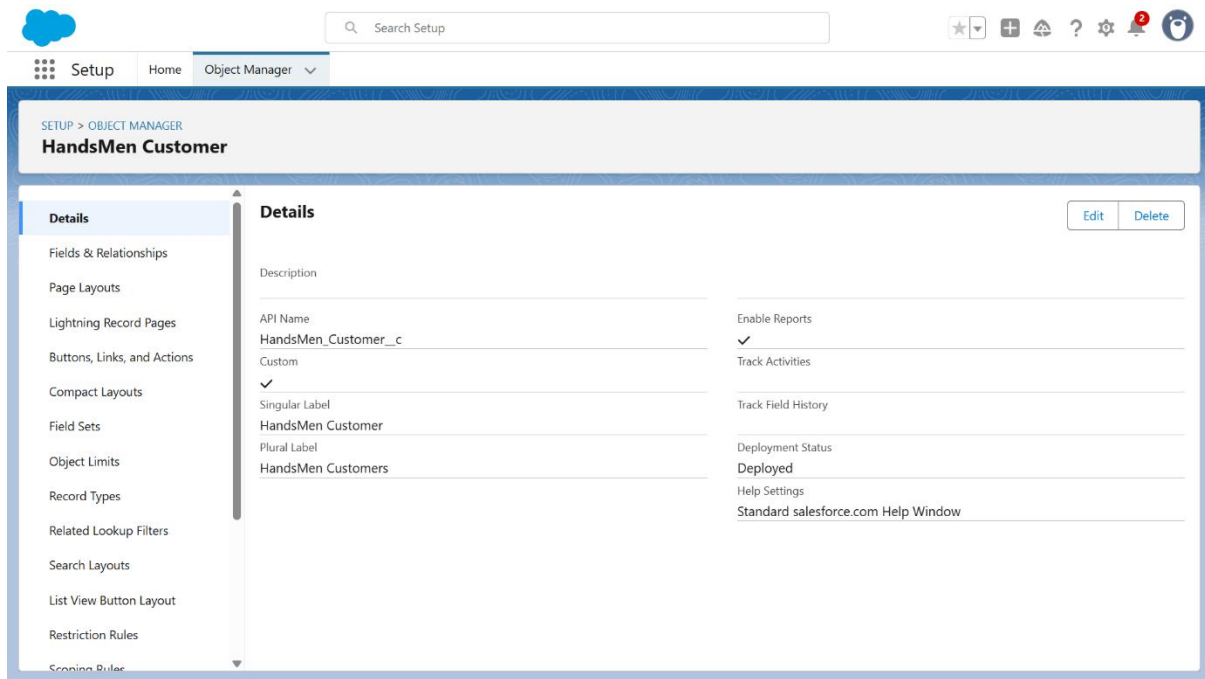
### **2. Custom Object Creation**

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"

New HandsMen Customer

\* = Required Information

Information

\* HandsMen Customer Name

Email
↶

Phone

Loyalty Status
▼

--None--

FirstName

LastName

Owner

Taranveer Singh Saini

Total Purchases

⛔

We hit a snag.

Review the errors on this page.

- Please fill Correct Gmail

Cancel

Save & New

Save

## 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.

**Setup** Home Object Manager

Search Setup

Quick Find

Setup Home  
Salesforce Go  
Service Setup Assistant  
Commerce Setup Assistant  
Field Service Setup Home (Beta)  
Hyperforce Assistant  
Release Updates  
Salesforce Mobile App  
Lightning Usage  
Optimizer  
Sales Cloud Everywhere

ADMINISTRATION

Users

Permission Set Groups  
Permission Sets  
Profiles  
Public Groups

**Users**

User Edit: Kol Mikaelson

Save Save & New Cancel

**General Information**

First Name: Kol  
Last Name: Mikaelson  
Alias: kmika  
Email: taranveer140704@gmail.cc  
Username: taranveer954280@gmail.cc  
Nickname: User175413788361473535  
Title:  
Company:  
Department:  
Division:

Role: Inventory  
User License: Salesforce  
Profile: Platform 1  
Active:  
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: --None--  
Data.com Monthly Addition Limit: 300  
Accessibility 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.

**Setup** Home Object Manager

Search Setup

classic

Email

Classic Email Templates  
Classic Letterheads

Didn't find what you're looking for?  
Try using Global Search.

**Classic Email Templates**

Formatting Controls

Font: Size: Bold Italic Underline Link

Available Merge Fields

Select Field Type: Contact Fields  
Select Field:   
Copy Merge Field Value:

Save Preview Cancel

**HTML Email Content**

Subject: Your Order has been Confirmed!

Dear {!Order\_\_c.Customer\_\_c},

Your order #{!Order\_\_c.Name} has been confirmed!

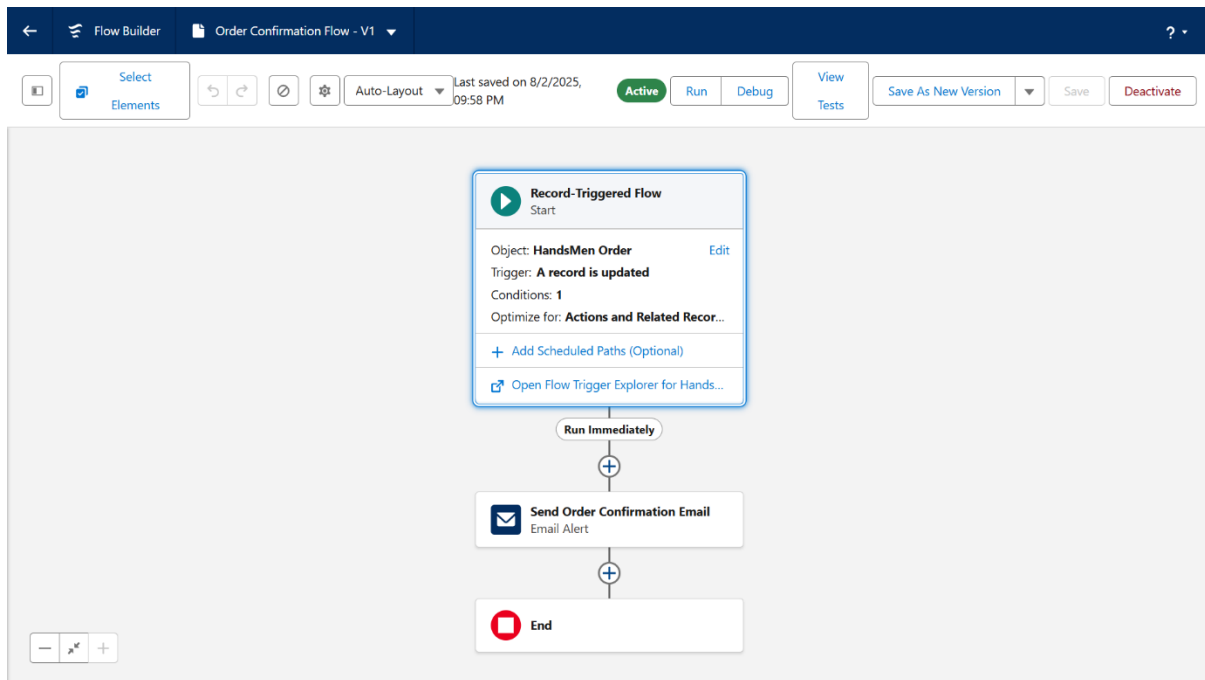
Thank you for shopping with us.

Best Regards,

## 8. Flow Implementations

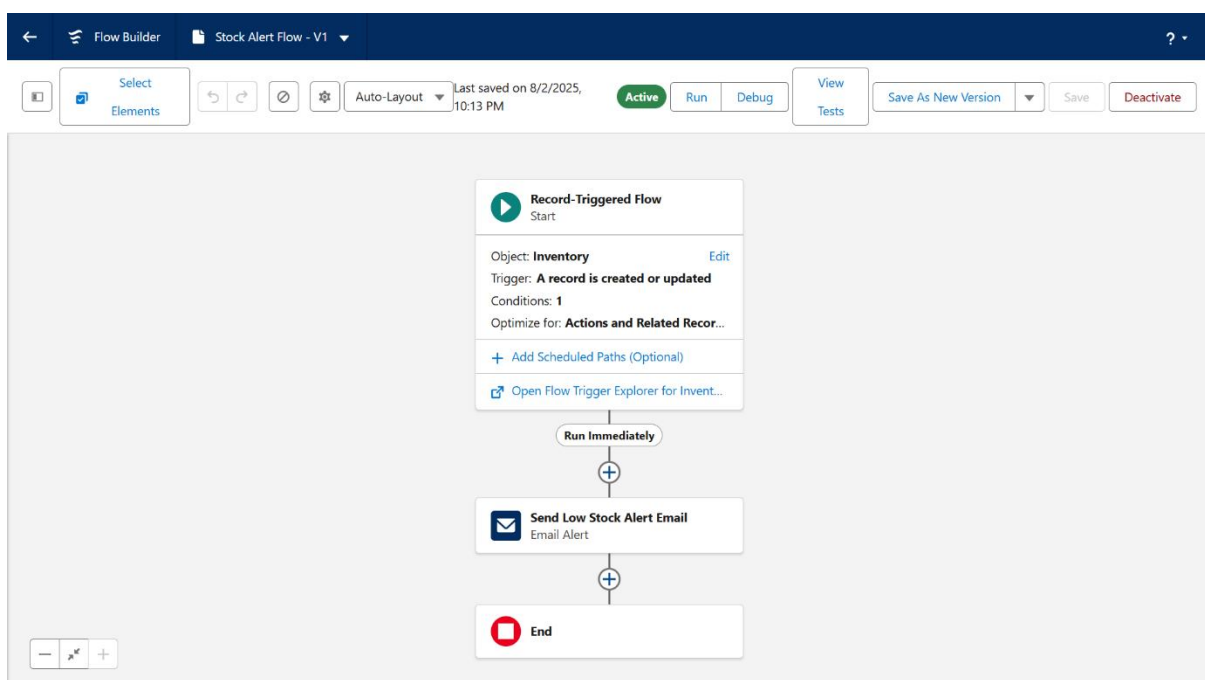
### a. Order Confirmation Flow

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



### b. Stock Alert Flow

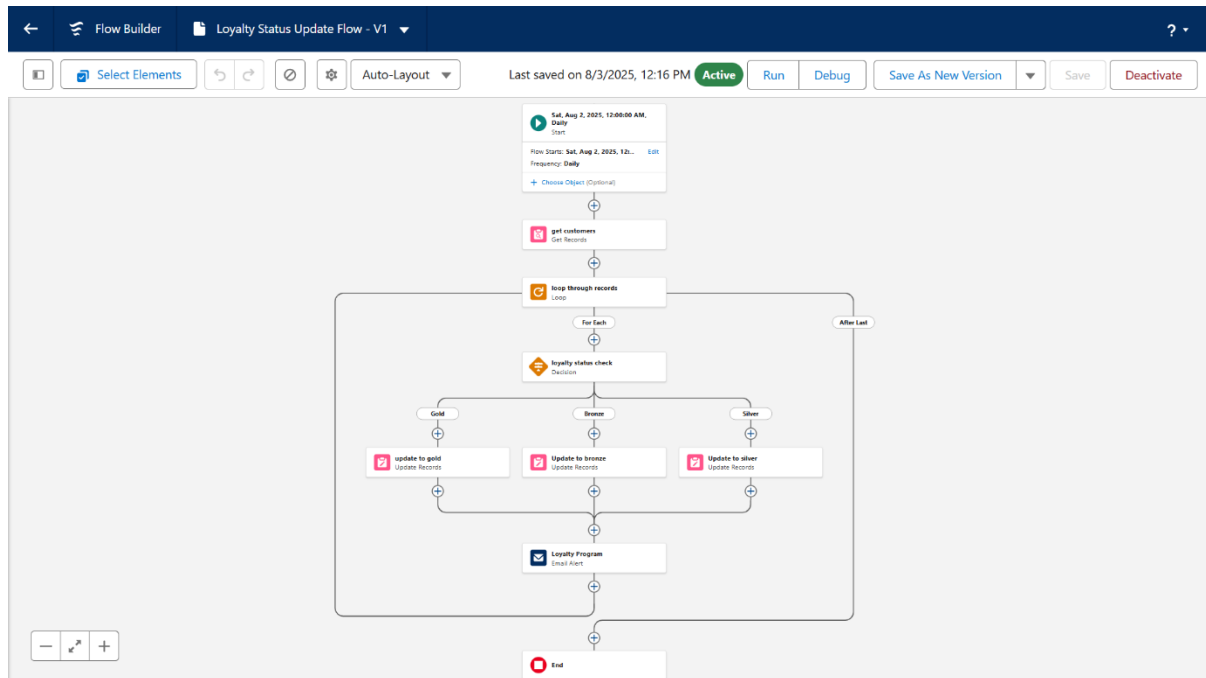
- Triggered when Inventory stock drops below 5.
- Sends Low Stock email to Inventory Manager.





### c. Scheduled Flow: Loyalty Update

- Runs daily at midnight.
- Loops through customers and updates their Loyalty Status based on total purchases.



## 7. 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  $\text{Total\_Amount} = 2 \times 500 = ₹1000$ .

### 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 value:

<₹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:

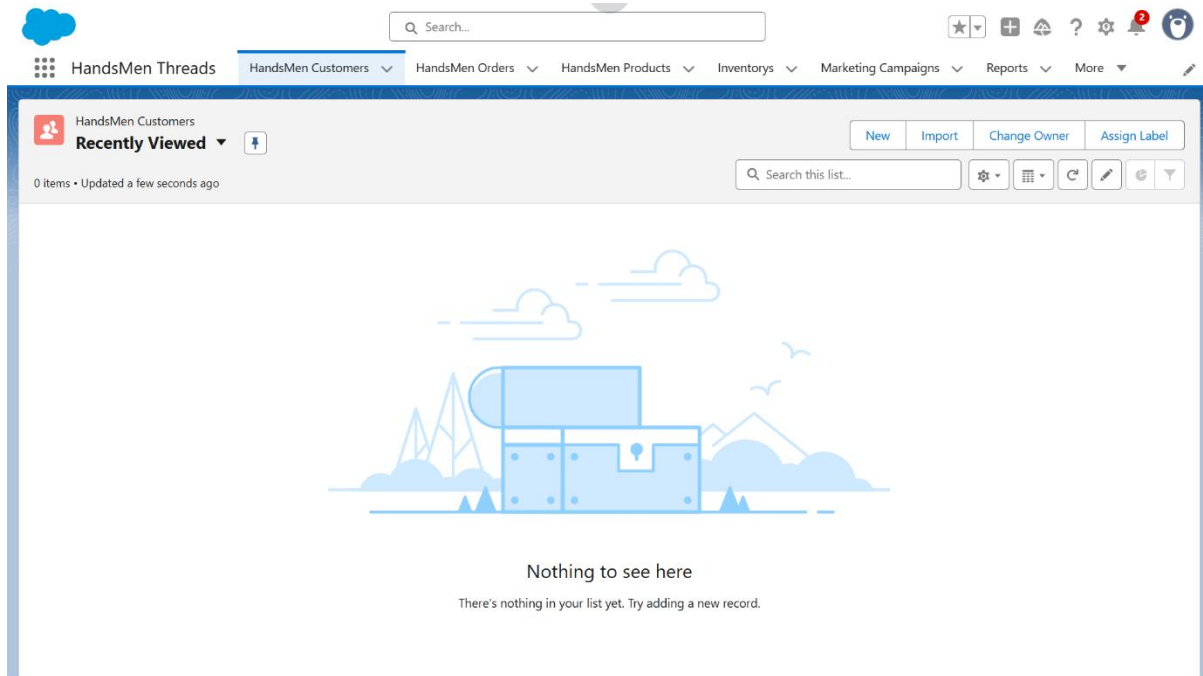
"Thanks for your purchase! Your loyalty status is now Silver."

### 7. Users and Roles

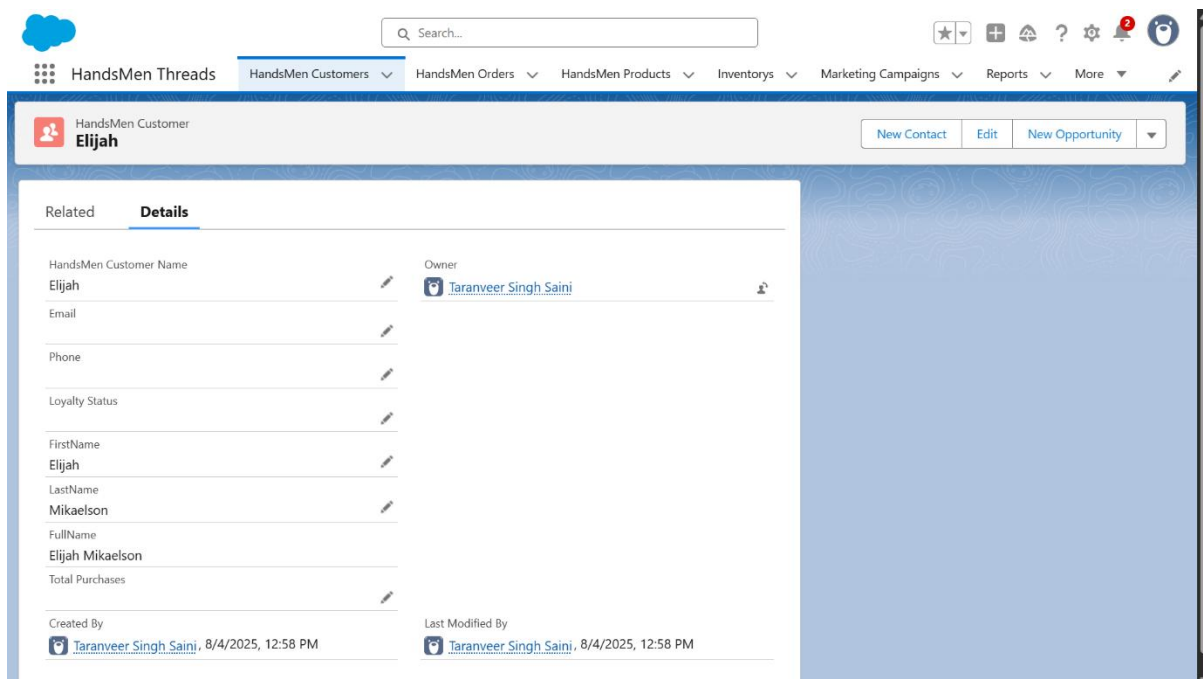
Salesforce users like store staff are created:

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

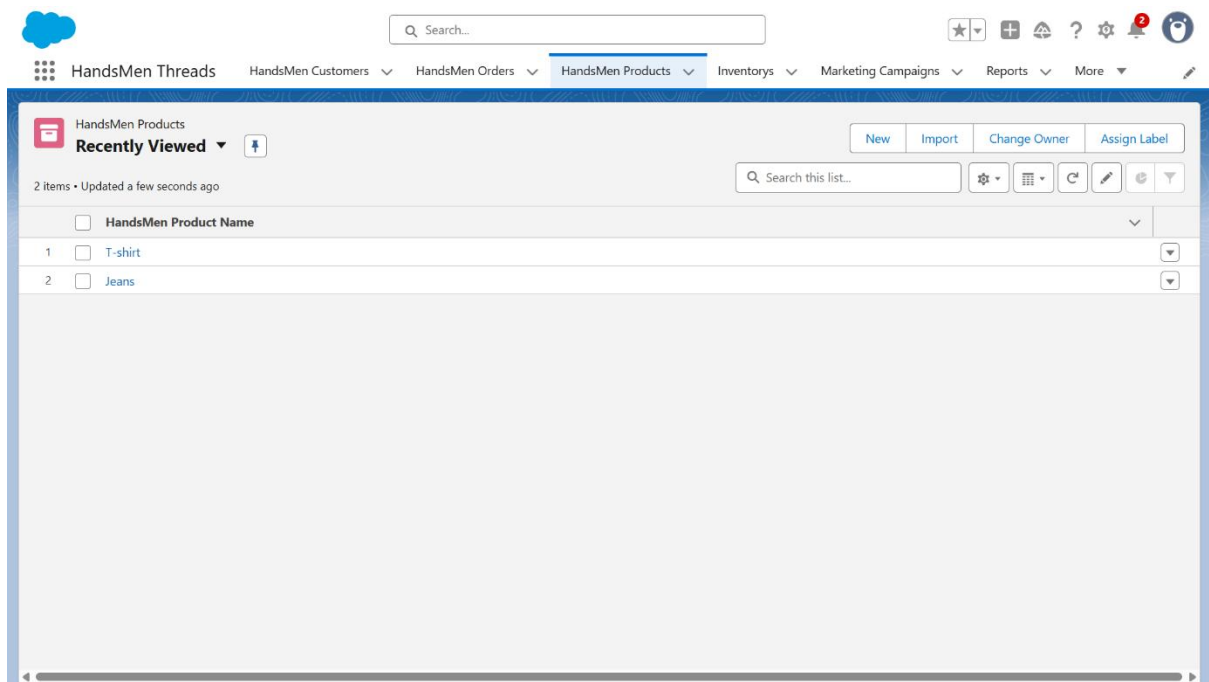
# Screenshots



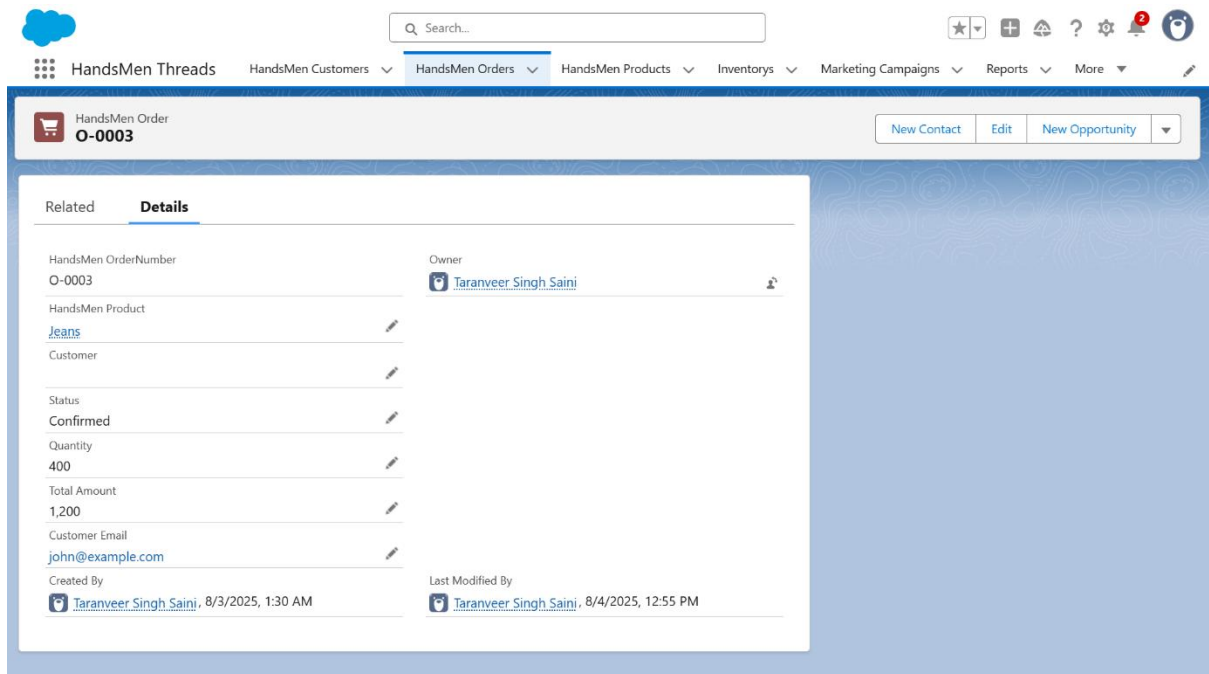
**Fig: Custom App for HandsMen Threads**



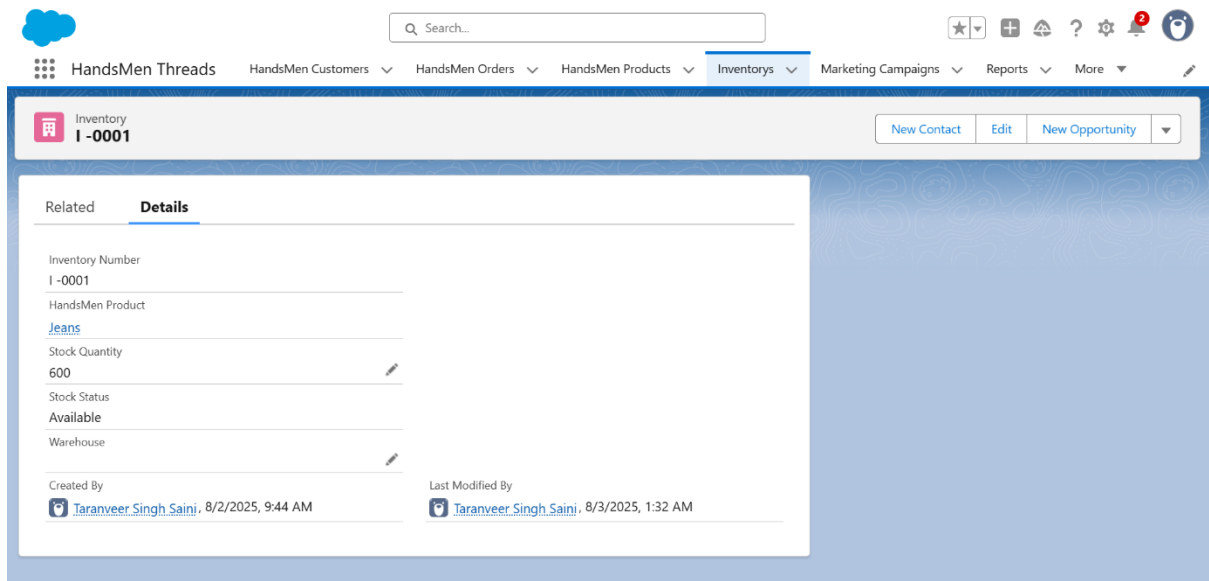
**Fig: Customer Creation in HandsMen Threads**



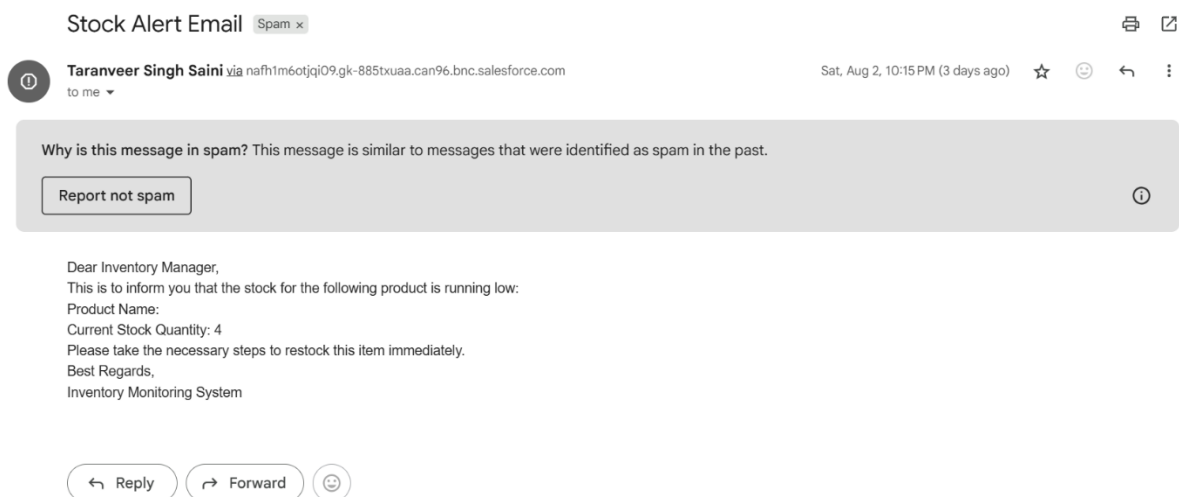
**Fig: Products in HandsMen Threads**



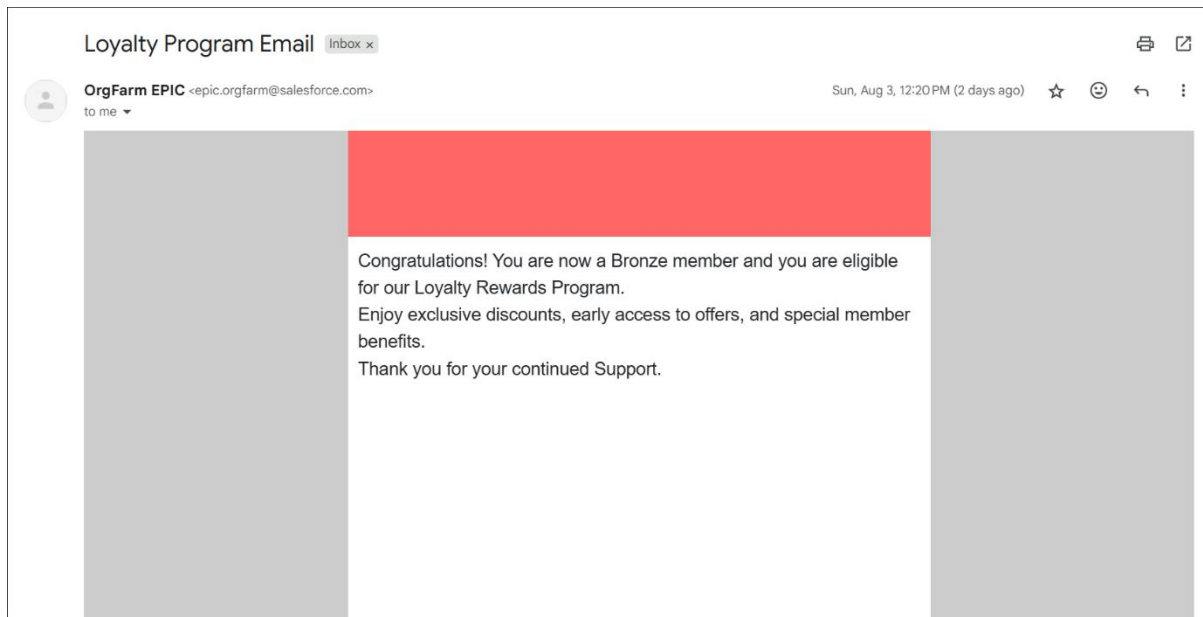
**Fig: Order Confirmation**



**Fig: Inventory Creation**



**Fig: Low Stock Alert Email**



**Fig: Loyalty Program Email**

## **Conclusion**

The HandsMen Threads Salesforce implementation successfully addressed key business challenges by delivering a custom, automated, and secure CRM system. The project enabled efficient data management, streamlined operations, and elevated customer service through timely communication and automated workflows.

The use of Salesforce tools like Flow Builder, Validation Rules, and Lightning App Builder ensured a no-code/low-code approach that's easy to maintain and scale. The project demonstrates the adaptability of Salesforce to industry-specific workflows, especially in fashion retail where personalization and service quality are critical.

### **Future Scope:**

- Integration with E-commerce Platforms:
  - Real-time order capture and status updates directly from the website.
- Salesforce Marketing Cloud Implementation:
  - Personalized marketing campaigns and customer engagement analytics.
- Mobile Application Access:
  - Salesforce mobile app for sales and tailoring teams for on-the-go access.
- AI-Powered Insights:
  - Implement Salesforce Einstein for predictive analytics and tailored product recommendations.
- Third-party Integration:
  - Integration with logistics (for shipping), payment gateways, and social media for omnichannel engagement.

This Salesforce solution positions HandsMen Threads for sustainable growth and digital innovation, enhancing its ability to deliver a premium experience to every customer.