HandsMen Threads: Redefining Sophistication with a Custom CRM Solution

ABSTRACT

This document outlines the strategic deployment of a tailor-made Salesforce CRM for HandsMen Threads, a luxury men's fashion and tailoring brand. The project's core mission was to create a centralized system that could manage all aspects of the brand's operations, from customer interactions to inventory management.

The solution is anchored by a carefully crafted data model utilizing five essential custom objects:

- Customer
- Order
- Product
- Inventory
- Marketing Campaign

We automated critical business functions using a blend of declarative tools like Record-Triggered Flows, Scheduled Flows, and Email Alerts, alongside custom programmatic logic via Apex Triggers. These automations manage everything from sending instant order confirmations to flagging low-stock items. To ensure the integrity of our data, we put in place strict Validation Rules and designed a robust, role-based security framework for our Sales, Inventory, and Marketing teams. A scheduled Apex batch job was also implemented to handle automatic updates of low-stock quantities, adding another layer of efficiency.

Ultimately, this complete Salesforce CRM implementation has not only enhanced the customer journey with personalized communication but also significantly improved operational efficiency, laying a scalable groundwork for the brand's future expansion.

OBJECTIVE

The primary objective of this project was to engineer a bespoke Salesforce CRM system for HandsMen Threads that would achieve the following:

- Streamline key operational processes across the entire organization.
- Enforce data accuracy and consistency to ensure reliable information for all departments.
- Elevate customer satisfaction through personalization and more meaningful interactions.

This integrated platform centrally manages customers, orders, products, inventory, and marketing campaigns, with a specific focus on:

- Automating core workflows, such as sending order confirmations, updating loyalty tiers, and generating timely stock alerts.
- Leveraging validation rules to guarantee clean and consistent data entry.
- Delivering real-time visibility into inventory levels and customer engagement.
- Enabling seamless, role-based collaboration among different departments.
- Crafting targeted customer experiences through a tiered loyalty program and personalized messaging.

TECHNOLOGY DESCRIPTION

Salesforce Overview

Salesforce is a comprehensive, cloud-based Customer Relationship Management (CRM) platform. It's a powerful tool designed to manage every facet of customer relationships, automate complex business processes, and improve key functions like sales, service, and marketing. It offers a unique dual approach, providing both user-friendly, no-code declarative tools (like Flows and Validation Rules) for quick automation and powerful programmatic options (like Apex and Triggers) for advanced, custom logic.

Key Features Used

1. Custom Objects: At the heart of our solution are custom objects, which function much like database tables. We created them to store specific business information:

   Customer__c – Holds all customer data.
   Product__c – Manages our product catalog.
   Order__c – Tracks every purchase.

2. Tabs: Each custom object was given its own tab in the Salesforce interface, making it easy for users to navigate and access their data.

3. Custom Lightning App: We created a unified application for HandsMen Threads that brought all relevant tabs into a single, cohesive interface.

4. Profiles & Roles: Profiles define the fundamental permissions for a user, dictating what they can see and do. Roles create a data-sharing hierarchy, allowing managers to view their team's data, which was crucial for improving collaboration.

5. Permission Sets: To provide specific, additional permissions without altering a user's base profile, we used permission sets.

6. Validation Rules: These were vital for maintaining data quality. For example, we implemented rules to ensure that a customer's email address is in the correct format and that stock values never fall into the negative.

7. Email Templates & Alerts: We created a set of standardized, pre-formatted email templates (e.g., "Order Confirmation") that are sent to customers or internal users via Email Alerts, which are a type of action triggered by our automation flows.

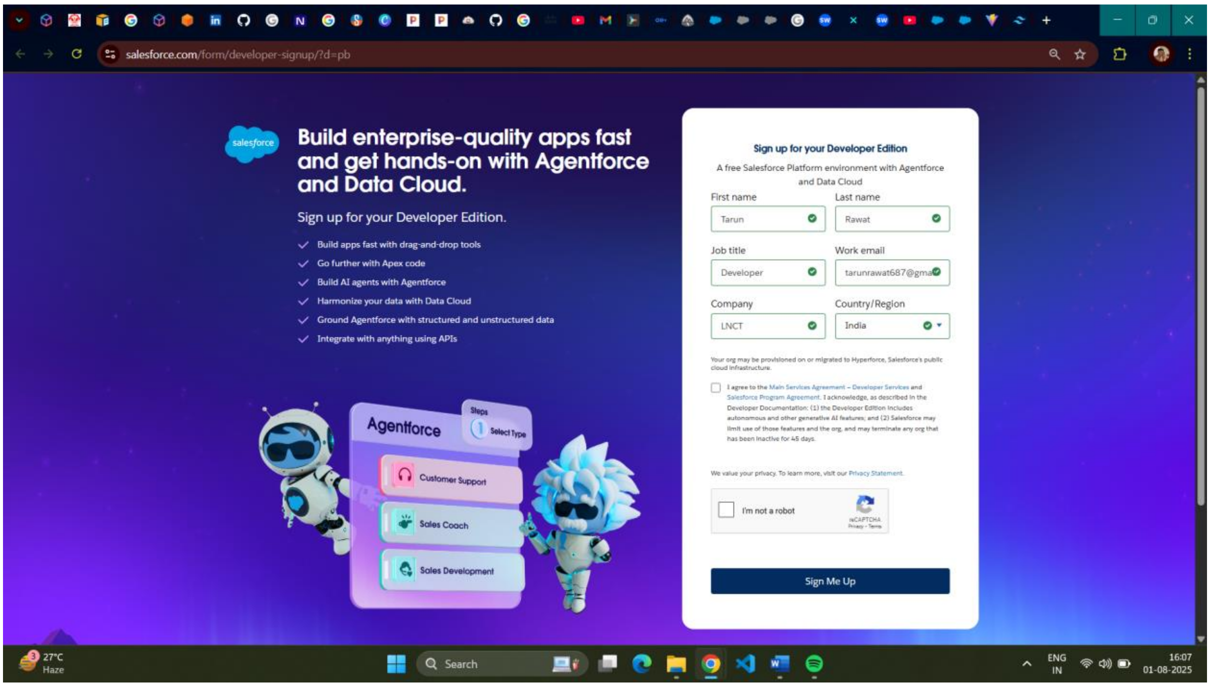
8. Flows: This no-code tool was essential for automating our business processes, such as dispatching a confirmation email when an order is finalized.

9. Apex: For logic that was too complex for flows, we relied on Apex, Salesforce's object-oriented programming language. We used it to write custom code for triggers that auto-calculate order totals and deduct stock.

IMPLEMENTATION DETAILS

The development of the HandsMen Threads CRM was executed in a series of logical steps, moving from initial setup to the creation of complex automation. Each phase was designed to build upon the last, ensuring a robust and well-integrated system.

Step 1 – Developer Org Setup
To begin the project, we first established a dedicated Salesforce environment. This was done by registering a new account at the official developer portal, https://developer.salesforce.com/signup. After a quick verification process, we gained access to the core Salesforce Setup page, which became our central hub for all subsequent development.


salesforce.com/form/developer-signup/?d=pb

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First name: Tarun
Last name: Rawat
Job title: Developer
Work email: tarunrawat687@gma
Company: LNCT
Country/Region: India

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.

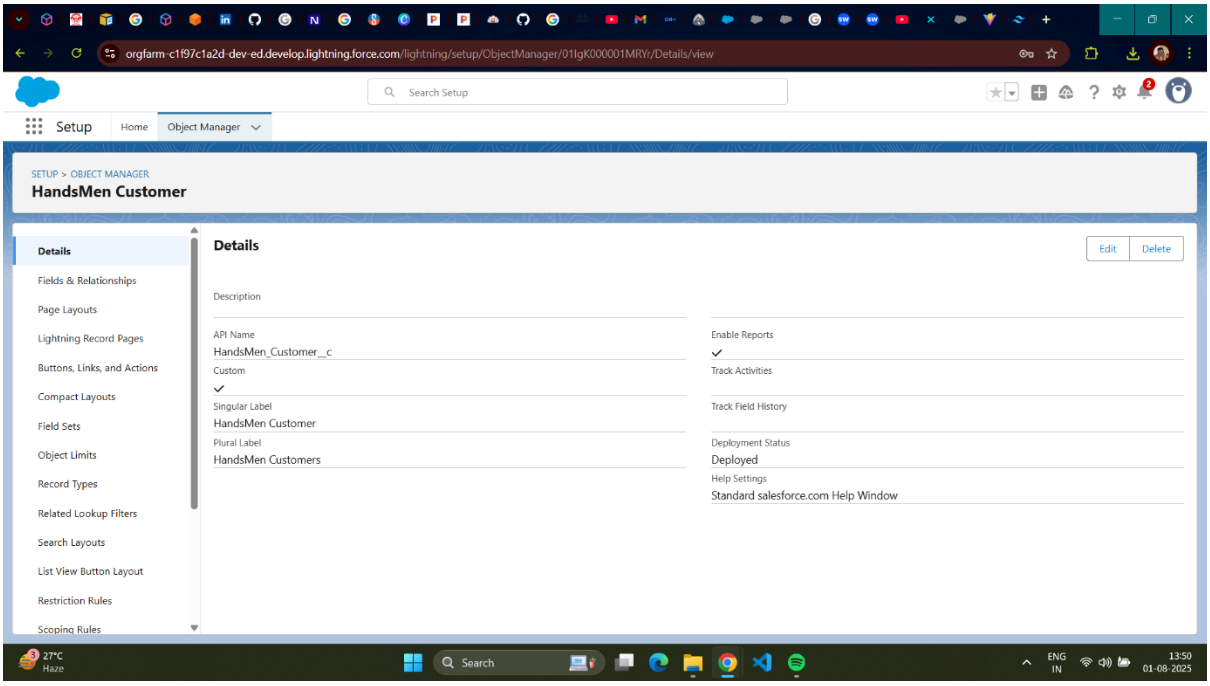
We value your privacy. To learn more, visit our Privacy Statement.

□ I'm not a robot

Step 2 - Custom Object Creation
The next critical phase involved structuring the database. We built five custom objects to precisely map the unique business needs of HandsMen Threads:

- HandsMen Customer: To store and manage all client information, including personal details and loyalty status.
- HandsMen Product: To house the entire product catalog, including attributes like SKU, pricing, and stock levels.
- HandsMen Order: To capture and track all customer purchase transactions, with fields for quantity and status.
- Inventory: To accurately monitor real-time stock quantities and warehouse locations.
- Marketing Campaign: To organize and schedule promotional efforts.

The creation process for each object was uniform: we navigated to **Setup → Object Manager → Create → Custom Object**, provided a unique label and API name, and then enabled key features like reports and search before saving. A tab was created for each new object to make it accessible in the user interface.



orgfarm-c1f97c1a2d-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgK000001MRYr/Details/view

SETUP > OBJECT MANAGER

HandsMen Customer

Details

Description

API Name
HandsMen_Customer__c

Custom
✓

Singular Label
HandsMen Customer

Plural Label
HandsMen Customers

Enable Reports
✓

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Step 3 – Creating the Lightning App

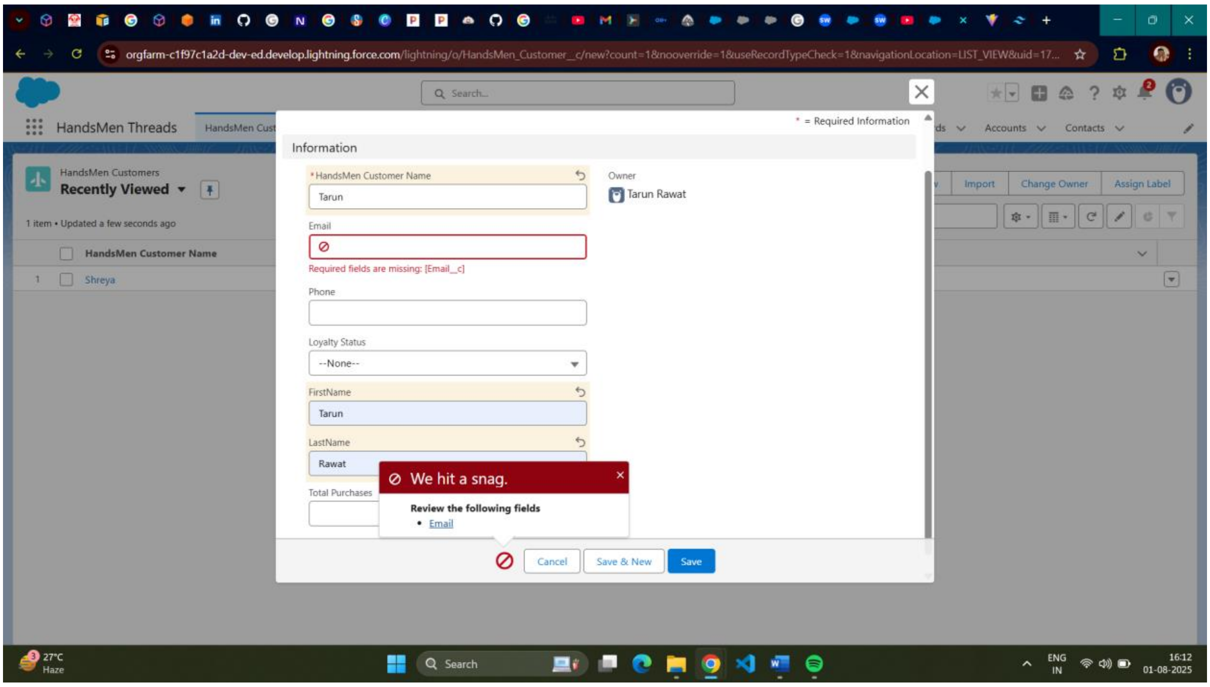
To provide the team with a focused and efficient workspace, we developed a custom Lightning App named **HandsMen Threads**. This application serves as a central dashboard, consolidating all relevant tools and data. It includes tabs for **Customers**, **Products**, **Orders**, **Inventory**, **Campaigns**, and more. Initially, the app was assigned to the **System Administrator** profile for thorough testing before wider deployment.

Step 4 – Validation Rules

Data integrity was a top priority. We implemented validation rules to prevent incorrect or incomplete data from being saved, ensuring reliability across the system.

- On the Order Object: We enforced a rule to ensure that the **Total_Amount__c** field is always a positive number. If a user tries to save an order with a value less than or equal to zero, a message reading **“Please Enter Correct Amount.”** is displayed.

- On the Customer Object: To maintain clean communication data, we added a rule to validate email addresses, requiring them to contain **“@gmail.com”**. The user is prompted with **“Please Fill Correct Gmail.”** if the format is incorrect.


orgfarm-c1f97c1a2d-dev-ed.develop.lightning.force.com/lightning/o/HandsMen_Customer__c/new?count=1&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST_VIEW&uid=17...

* = Required Information

Information

*HandsMen Customer Name: Tarun

Owner: Tarun Rawat

Email:

Required fields are missing: [Email__c]

Phone:

Loyalty Status: --None--

FirstName: Tarun

LastName: Rawat

Total Purchases:

We hit a snag.

Review the following fields

- Email

Step 5 – User Role & Profile Setup

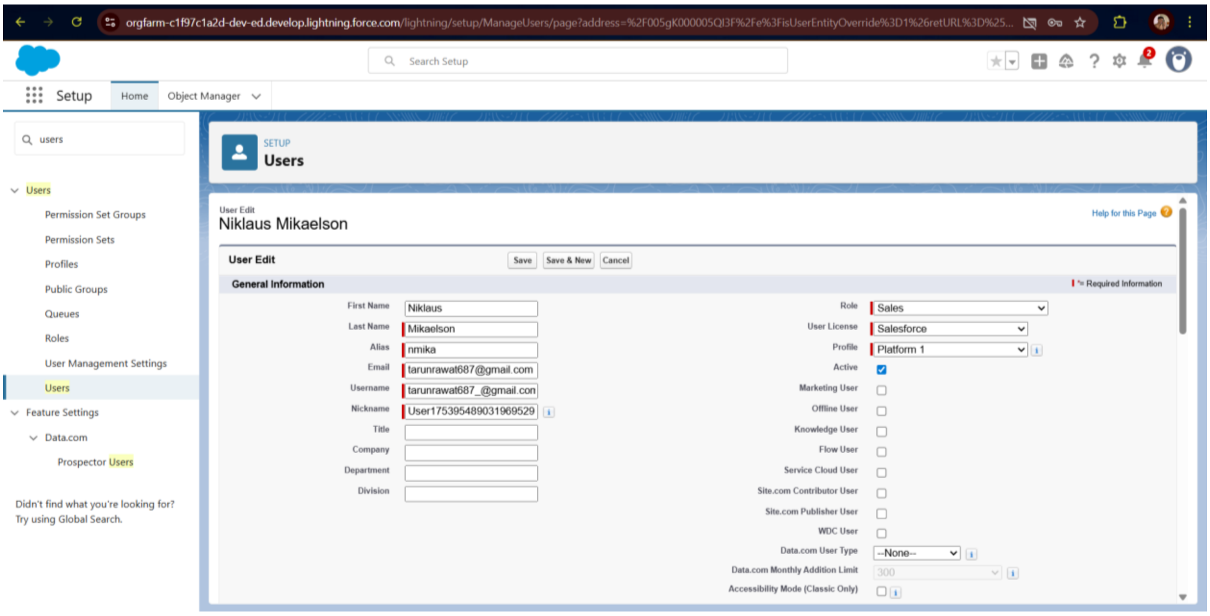
We configured user access to align with organizational roles and responsibilities. The standard **Platform 1** profile was created by cloning the default Standard User profile and was then modified to provide access to all the newly created custom objects. This profile was the foundation for our user base. We then created a hierarchy of roles to manage data visibility:

- **Sales Manager**
- **Inventory Manager**
- **Marketing Team**

Step 6 - User Creation

To test our security model, we created specific user accounts and assigned them to the new roles and profiles.

- *Niklaus Mikaelson* was assigned the **Sales** role.
- *Kol Mikaelson* was assigned the **Inventory** role. These assignments were critical to proving that our role-based controls were working, ensuring each user could only access the data and functions relevant to their job.



User Edit
Niklaus Mikaelson

User Edit

General Information — | = Required Information

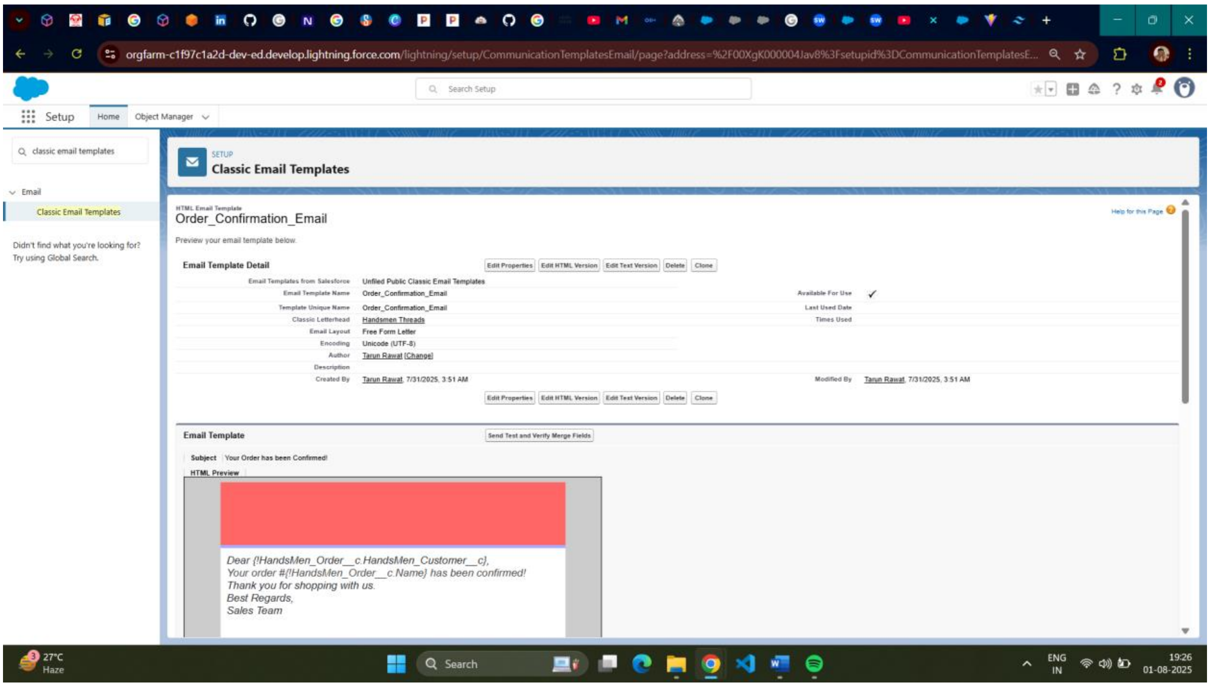
First Name	Niklaus	Role	Sales
Last Name	Mikaelson	User License	Salesforce
Alias	nmika	Profile	Platform 1
Email	tarunrawat687@gmail.com	Active	☑
Username	tarunrawat687_@gmail.con	Marketing User	□
Nickname	User175395489031969529	Offline User	□
Title		Knowledge User	□
Company		Flow User	□
Department		Service Cloud User	□
Division		Site.com Contributor User	□
		Site.com Publisher User	□
		WDC User	□
		Data.com User Type	--None--
		Data.com Monthly Addition Limit	300
		Accessibility Mode (Classic Only)	□

Step 7 – Email Templates & Alerts

To streamline communication, three branded email templates were designed:

- Order Confirmation: Used to inform customers when their order status is confirmed.
- Low Stock Alert: Notifies the Inventory Manager when stock levels for a product fall below 5 units.
- Loyalty Program Email: Sent to a customer whenever their loyalty status changes.

These templates were then connected to **Email Alerts**, which are the actions that automation flows can trigger to send these emails.


orgfarm-c1f97c1a2d-dev-ed.develop.lightning.force.com/lightning/setup/CommunicationTemplatesEmail/page?address=%2F00XgK000004Jav8%3Fsetupid%3DCommunicationTemplatesE...
Search Setup
Setup
Home
Object Manager
classic email templates
Email
Classic Email Templates
Didn't find what you're looking for? Try using Global Search.
SETUP
Classic Email Templates
Help for this Page
Edit Properties
Edit HTML Version
Edit Text Version
Delete
Clone
Send Test and Verify Merge Fields
Search
27°C
Haze
ENG
IN
19:26
01-08-2025

HTML Email Template
Order_Confirmation_Email

Preview your email template below.

Email Template Detail

Email Templates from Salesforce	Unfiled Public Classic Email Templates		
Email Template Name	Order_Confirmation_Email	Available For Use	✓
Template Unique Name	Order_Confirmation_Email	Last Used Date	
Classic Letterhead	Handsmen Threads	Times Used	
Email Layout	Free Form Letter		
Encoding	Unicode (UTF-8)		
Author	Tarun Rawat [Change]		
Description			
Created By	Tarun Rawat, 7/31/2025, 3:51 AM	Modified By	Tarun Rawat, 7/31/2025, 3:51 AM

Email Template

Subject Your Order has been Confirmed!

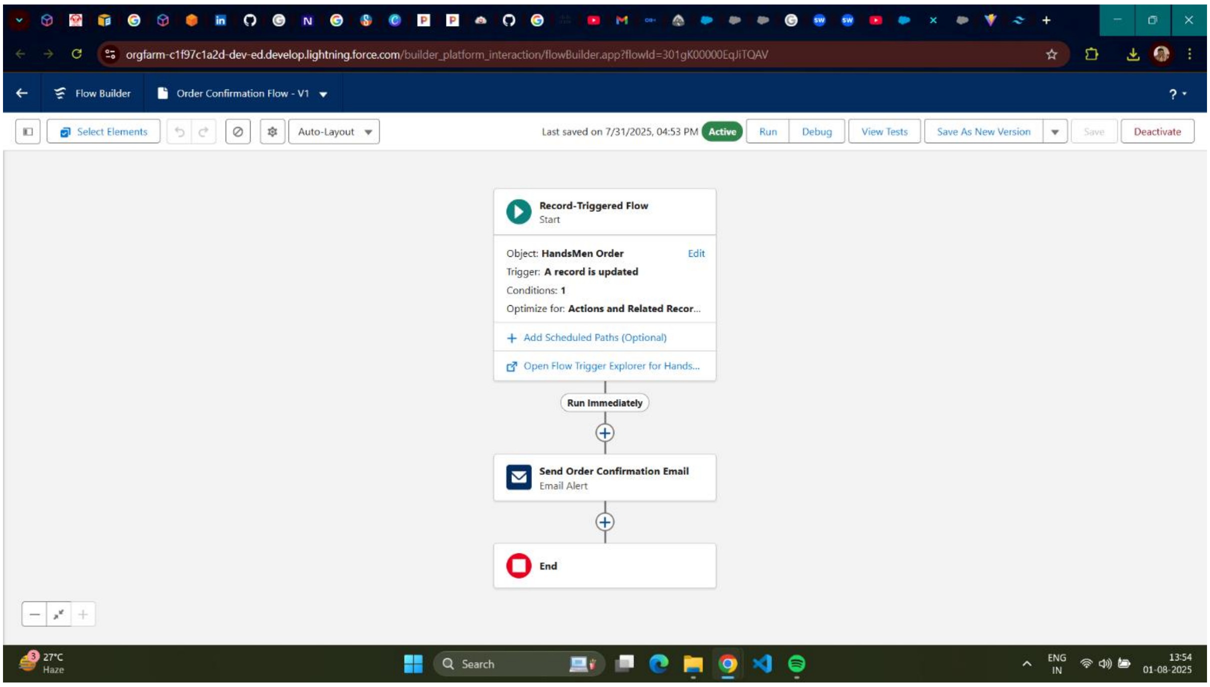
HTML Preview

Dear {!HandsMen_Order__c.HandsMen_Customer__c},
Your order #{!HandsMen_Order__c.Name} has been confirmed!
Thank you for shopping with us.
Best Regards,
Sales Team

Step 8 – Flow Implementations

We built several no-code automation flows to handle key processes automatically:

- Order Confirmation Flow: Automatically dispatches a confirmation email to the customer as soon as an order is marked as **Confirmed**.



orgfarm-c1f97c1a2d-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=301gK00000EqJiTQAV

Flow Builder | Order Confirmation Flow - V1

Last saved on 7/31/2025, 04:53 PM Active

Record-Triggered Flow
Start

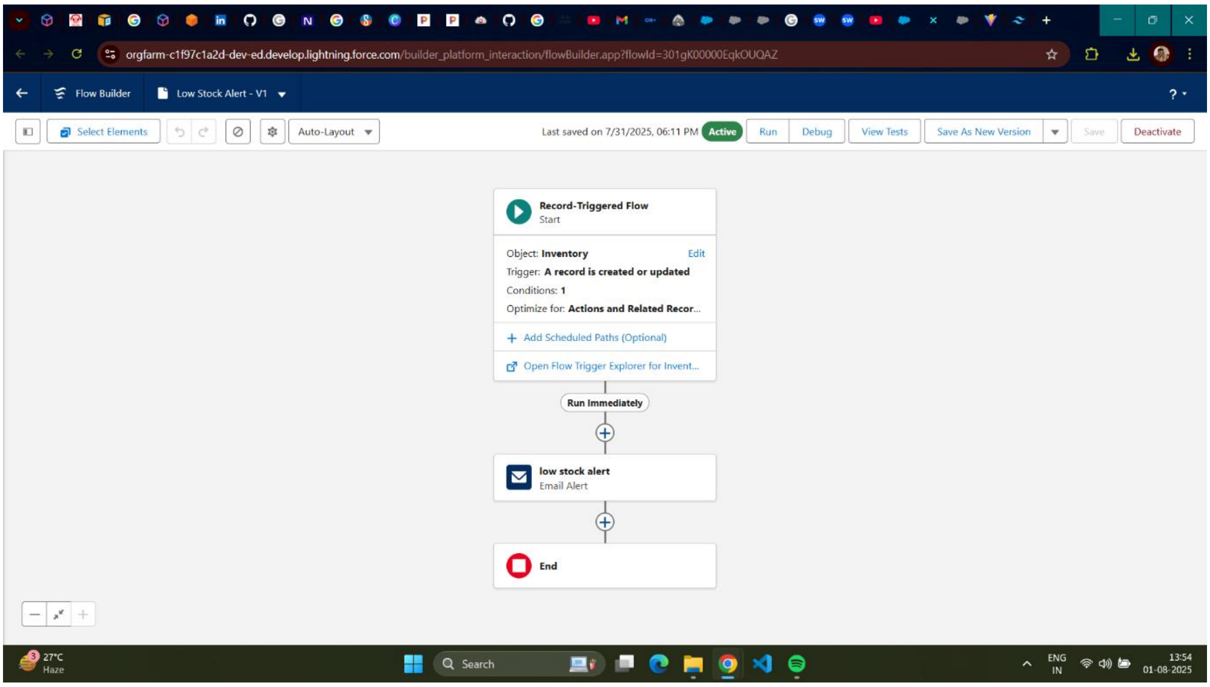
Object: HandsMen Order
Trigger: A record is updated
Conditions: 1
Optimize for: Actions and Related Recor...

Run Immediately

Send Order Confirmation Email
Email Alert

End

- Low Stock Alert Flow: Sends an email alert to the **Inventory Manager** when a product’s stock quantity drops below a threshold of 5.



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Flow Builder | Low Stock Alert - V1

Last saved on 7/31/2025, 06:11 PM Active

Record-Triggered Flow
Start

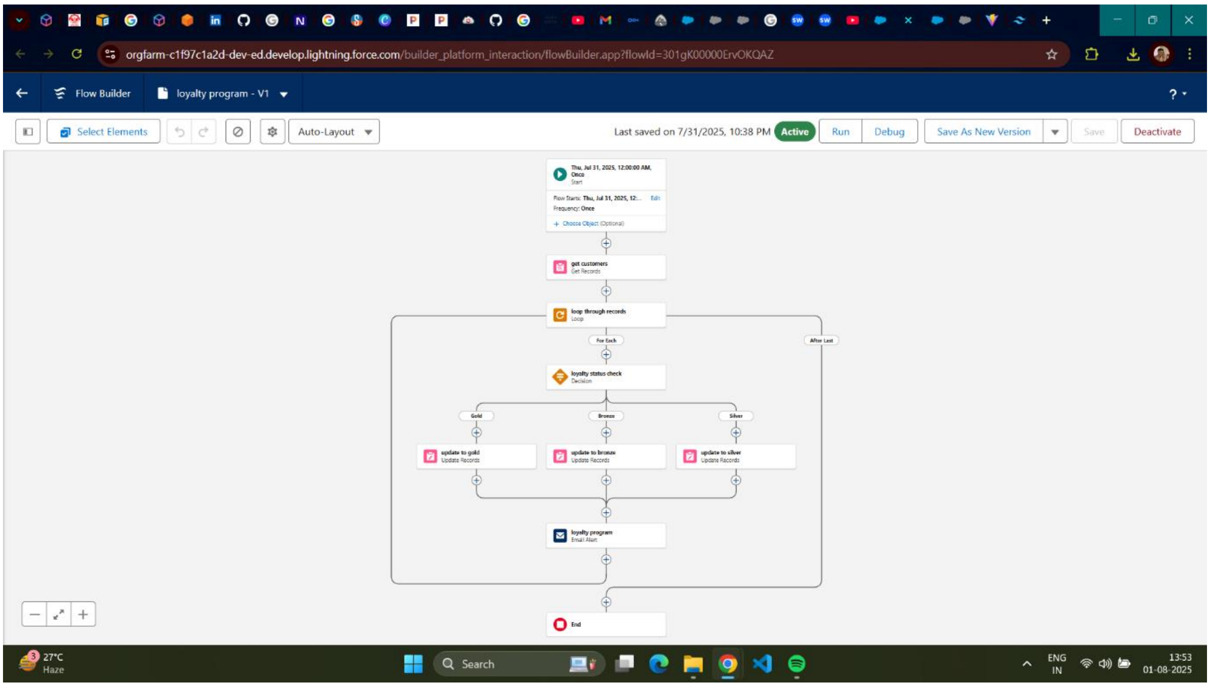
Object: Inventory
Trigger: A record is created or updated
Conditions: 1
Optimize for: Actions and Related Recor...

Run Immediately

low stock alert
Email Alert

End

- Scheduled Loyalty Flow: This flow is set to run automatically every night at **12:00 AM**. Its purpose is to review all customer records and update their loyalty status based on their accumulated total purchases.



Step 9 – Apex Triggers
For more advanced logic that couldn't be handled by flows, we implemented Apex triggers:

- Order Total Trigger: A trigger that runs whenever a new order is placed or updated. It automatically computes the **Total_Amount__c** by multiplying the quantity by the unit price.
- Stock Deduction Trigger: Activated upon an order being placed, this trigger automatically subtracts the ordered quantity from the corresponding product's stock level.
- Loyalty Status Trigger: This trigger updates a customer's **Loyalty Status** by assessing their total purchases whenever a new order is associated with their record.

PROJECT EXPLANATION WITH REAL-WORLD EXAMPLE

Let's walk through a typical customer journey to see how the new CRM system brings value to HandsMen Threads. We'll follow a customer's interaction from the initial visit to the loyalty program.

1. **Customer Registration**
A new customer, *Shreya*, visits the HandsMen Threads website and signs up for an account. A store associate, using the Salesforce platform, creates a new record for *Shreya* in the **Customer** object. The CRM's built-in **Validation Rule** immediately

checks the email address to ensure it's in a valid format (e.g., shreya@gmail.com), preventing bad data from entering the system.

2. Product Setup
Before *Shreya's* visit, an administrator has already configured the product catalog within the **Product__c** object. This includes items like "Skirt" and "Jeans," each with a specific SKU and price. The current stock levels for these products are managed in a separate **Inventory** record, ensuring we have a single, reliable source for stock data.

3. Order Placement
Shreya decides to purchase two Skirts, priced at **$500** each. A new **Order** record is created in Salesforce and associated with her customer record. As soon as the order is saved, an **Apex Trigger** automatically kicks in to calculate the total amount, setting the **Total_Amount__c** field to **$1000** (10 x $100).

4. Inventory Update
The moment the order is placed, a second **Apex Trigger** fires on the **Inventory** object. It intelligently deducts two units from the stock quantity for the tailored shirts. This real-time update ensures that the inventory manager, *Kol Mikaelson*, has the most accurate information. The system's **Validation Rule** also prevents the stock level from ever dropping below zero, avoiding any negative stock counts.

5. Loyalty Program
With her first purchase of $1000, *Shreya's* loyalty status is automatically evaluated. A dedicated **Apex Trigger** on the **Customer** object checks her total lifetime purchases. Based on the business rules:

- Less than $500: Bronze
- $500 to $1000: Silver
- More than $1000: Gold *Shreya's* new status is automatically updated from Bronze to **Silver**, rewarding her for her purchase and encouraging future engagement.

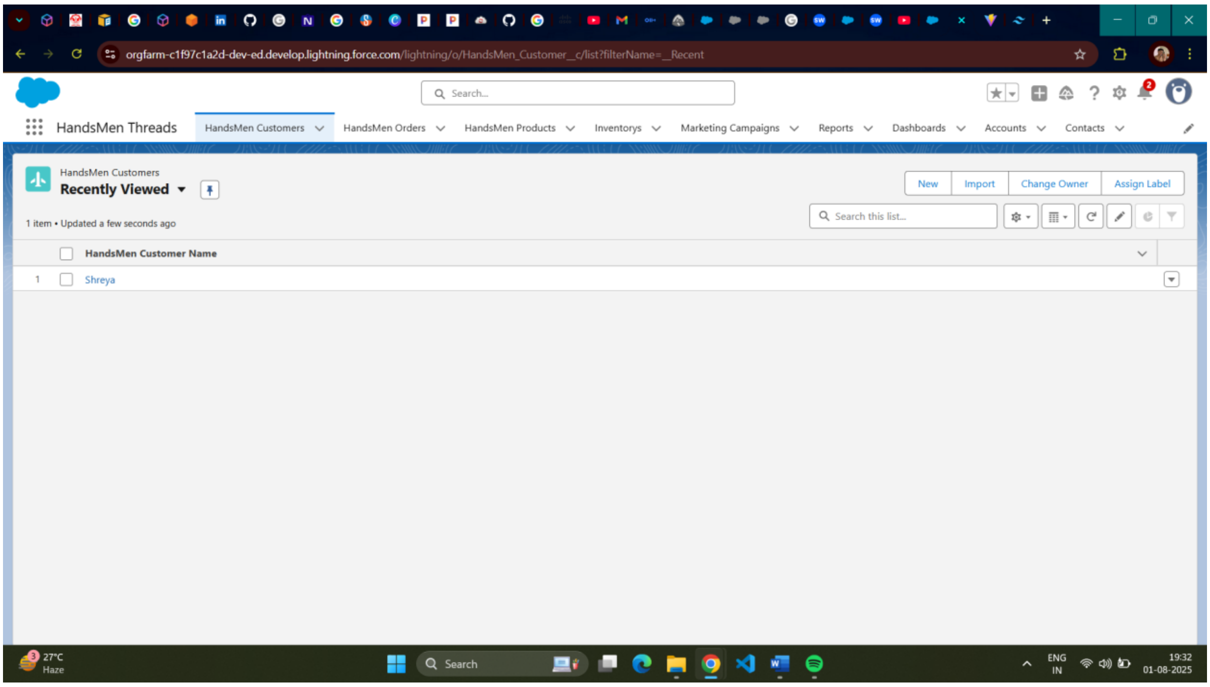
6. Email Notifications
Following the purchase, two automated communications are sent out without any manual intervention:

- The **Order Confirmation Flow** is triggered, which uses an **Email Alert** to send an email to *Shreya*.
- A separate **Email Alert** is sent to *Shreya* notifying her of her new **Silver** loyalty status. The **Sales Manager**, **Niklaus Mikaelson**, also receives a notification if any stock items fall below the low-stock threshold, enabling proactive management.

7. Users and Roles
Throughout this process, the system enforces our defined security model. For instance, **Niklaus Mikaelson** is able to view all customer and sales data due to his **Sales Manager** role, while **Kol Mikaelson** has specific access to the **Inventory**

records as the **Inventory Manager**, ensuring he only sees the information relevant to his job.

SCREENSHOTS



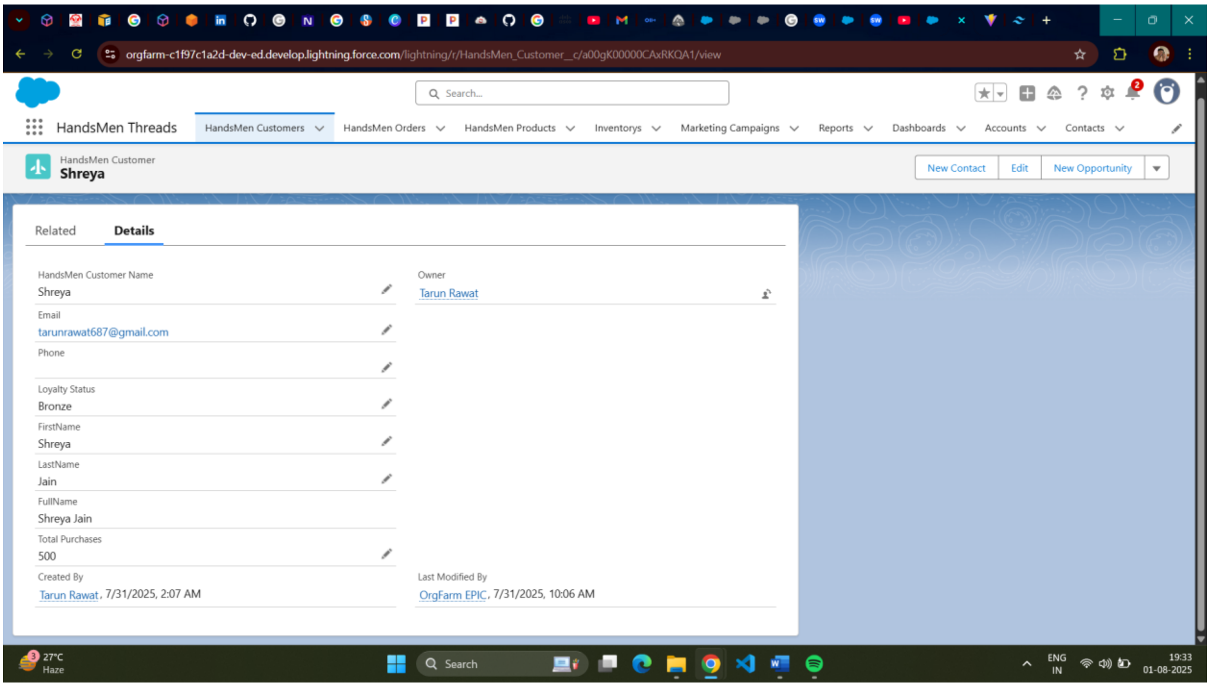
HandsMen Customers

Recently Viewed

1 item • Updated a few seconds ago

	HandsMen Customer Name
1	Shreya

Fig: Custom App for HandsMen Threads



HandsMen Customer

Shreya

HandsMen Customer Name: Shreya

Email: tarunrawat687@gmail.com

Phone:

Loyalty Status: Bronze

FirstName: Shreya

LastName: Jain

FullName: Shreya Jain

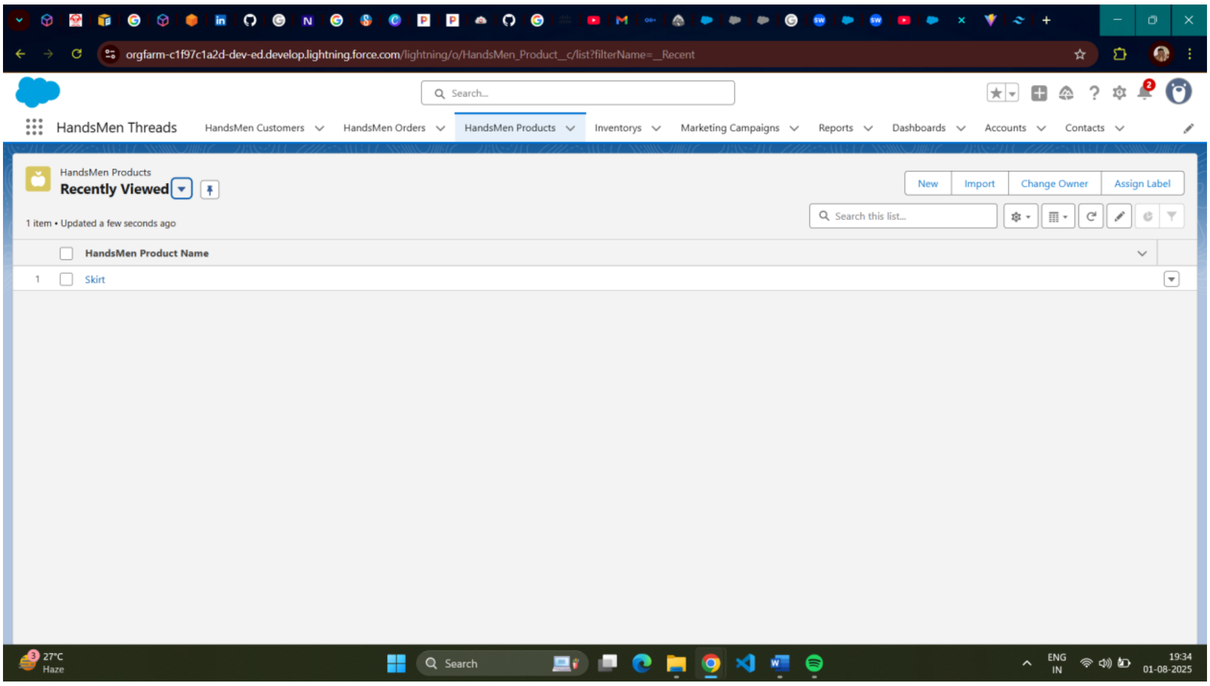
Total Purchases: 500

Created By: Tarun Rawat, 7/31/2025, 2:07 AM

Owner: Tarun Rawat

Last Modified By: OrgFarm EPIC, 7/31/2025, 10:06 AM

Fig: Customer Creation in HandsMen Threads

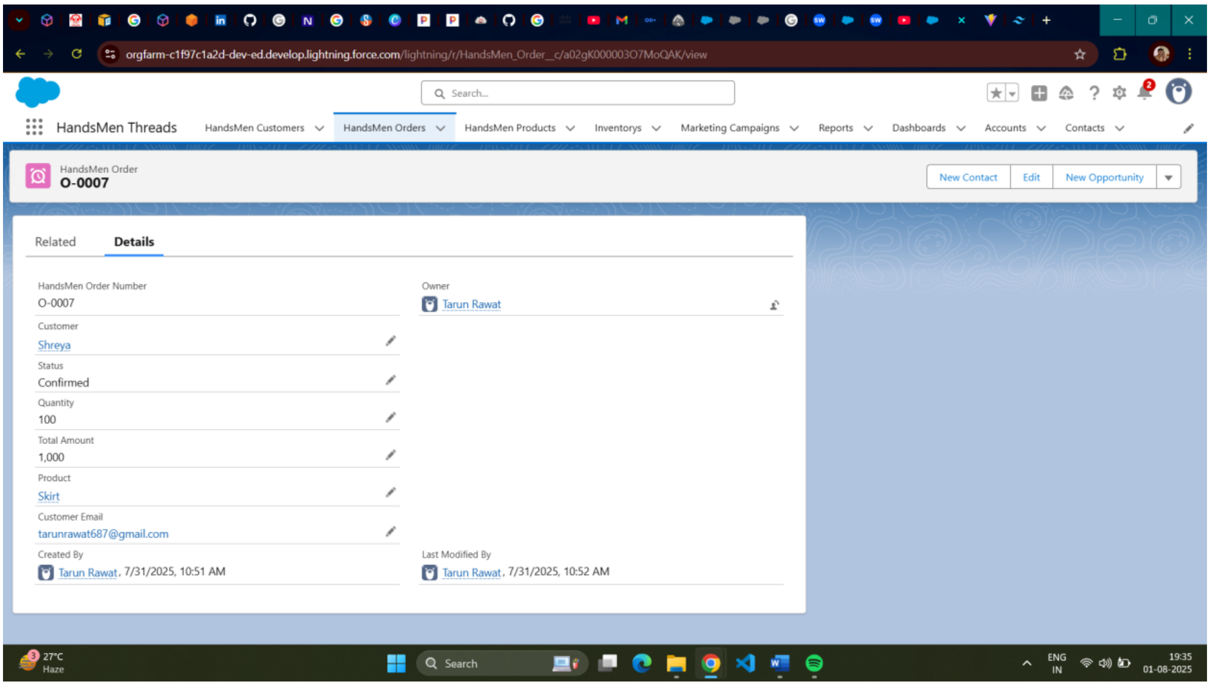


HandsMen Products
Recently Viewed

1 item • Updated a few seconds ago

	HandsMen Product Name
1	Skirt

Fig: Products in HandsMen Threads



HandsMen Order
O-0007

HandsMen Order Number
O-0007

Owner
Tarun Rawat

Customer
Shreya

Status
Confirmed

Quantity
100

Total Amount
1,000

Product
Skirt

Customer Email
tarunrawat687@gmail.com

Created By
Tarun Rawat, 7/31/2025, 10:51 AM

Last Modified By
Tarun Rawat, 7/31/2025, 10:52 AM

Fig: Order Confirmation Fig:

CONCLUSION

The custom Salesforce CRM solution for HandsMen Threads has successfully transformed key business processes. By leveraging a combination of declarative and programmatic tools, we have automated customer management, streamlined order tracking, centralized product data, and implemented real-time inventory and loyalty programs.

This implementation has resulted in:

- **Significant reduction in manual effort** across the sales and inventory teams.
- **Enhanced operational accuracy**, with processes now being error-free and executed in real time.
- **A foundation for personalized customer engagement**, enabling targeted communication and loyalty rewards.
- This project has created a robust, scalable platform that not only solves today's challenges but also positions HandsMen Threads for long-term, data-driven growth.

FUTURE SCOPE

With the core CRM platform now in place, several strategic enhancements have been identified to further elevate the brand's capabilities:

- Customer Community Portal**:** Developing a self-service portal would empower customers to track their orders, view their loyalty status, and update their information directly.
- Salesforce Mobile SDK App**:** A dedicated mobile application would allow store staff to manage inventory and process orders on the go, improving in-store efficiency.
- Dynamic Dashboards & Reports**:** Implementing advanced reporting tools and dynamic dashboards would provide executives and managers with real-time insights into sales performance, inventory turnover, and customer behavior.
- AI Recommendations via Einstein**:** Integrating Salesforce Einstein could provide customers with personalized product suggestions based on their purchase history, increasing up-sell and cross-sell opportunities.
- WhatsApp/SMS Notifications**:** Expanding the communication strategy to include instant notifications via messaging apps would provide customers with timely updates on their orders and loyalty status.