

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

## **ABSTRACT**

This project outlines the implementation of a customized Salesforce CRM solution for HandsMen Threads, a premium men's fashion and tailoring brand. The primary goal was to optimize business operations, enhance customer relationships, and ensure data accuracy across all departments.

The solution features a structured data model with five core custom objects: Customer, Order, Product, Inventory, and Marketing Campaign. Key business processes were automated using Record-Triggered Flows, Scheduled Flows, Email Alerts, and Apex to manage order confirmations, loyalty program updates, and real-time stock alerts.

To maintain data integrity, strict validation rules were implemented, along with a role-based security model for Sales, Inventory, and Marketing teams. Additionally, an Apex batch job was developed to monitor and update low stock levels automatically.

This end-to-end CRM solution delivers:

- Personalized customer experiences through automated communications
- Operational efficiency with workflow automation
- Scalable infrastructure for future business expansion

By leveraging the Salesforce Platform, HandsMen Threads, now has a unified, data-driven system that enhances decision-making and drives business growth.

## **OBJECTIVE**

The primary objective of this project is to design and implement a customized Salesforce CRM solution for HandsMen Threads to streamline business operations, maintain data integrity, and enhance customer satisfaction.

By establishing a centralized system to manage customers, orders, products, inventory, and marketing campaigns, this implementation aims to:

**Automate critical business processes**, including:

- Order confirmations and status updates
- Loyalty program status modifications
- Proactive inventory stock alerts

**Ensure data accuracy and consistency** through:

- Custom validation rules
- Standardized data entry processes

**Provide real-time business visibility** with:

- Instant inventory level tracking
- Complete customer interaction history

**Enhance team collaboration** by implementing:

- Role-based access controls
- Department-specific dashboards

**Elevate customer experience** through:

- Personalized communication workflows
- Targeted marketing campaigns
- Automated loyalty program benefits

This solution will transform HandsMen Threads' operations from manual, disjointed processes to an integrated, automated CRM ecosystem, driving efficiency and customer satisfaction while maintaining rigorous data standards.

The implementation focuses on creating a scalable foundation that can adapt to future business growth and evolving customer needs in the premium fashion retail sector.

## **TECHNOLOGY DESCRIPTION**

### **Salesforce Platform**

Salesforce is a cloud-based Customer Relationship Management (CRM) platform that enables businesses to:

- Centralize customer data
  - Automate sales, service, and marketing processes
  - Generate actionable insights through analytics
- It offers both point-and-click tools (for admin configurations) and programmatic capabilities (like Apex and Flows) for custom solutions.

### **Core Components Used**

#### **1. Custom Objects**

- Act as database tables to store unique business data.
- **Examples:**
  - **Customer Object:** Stores contact details, preferences, and purchase history
  - **Product Object:** Tracks item details, pricing, and categories
  - **Order Object:** Manages order status, dates, and linked customer/product data

## 2. Tabs

- Provide UI navigation to access object data.
- **Examples:**
  - **Products Tab:** View/edit product catalog
  - **Orders Tab:** Track order fulfillment status

## 3. Custom App

- A tailored application grouping relevant tabs for specific roles.
- **Example:**

*"HandsMen Retail Manager" App:* Combines Customer, Order, and Inventory tabs for sales teams

## 4. Profiles & Roles

**Profiles:** Define permissions (e.g., Sales reps can't edit inventory data).

**Roles:** Control data visibility via hierarchy (e.g., Store Managers > Sales Associates).

## 5. Automation Tools

**Flows:** Automate processes like order confirmations or low-stock alerts.

**Apex:** Custom logic (e.g., dynamic discount calculations).

## 6. Email Integration

**Email Templates:** Standardize communications (e.g., order receipts).

**Email Alerts:** Trigger notifications for critical events (e.g., delayed shipments).

### • WHY THESE TECHNOLOGIES?

**Custom Objects + Tabs** = Structured data with easy access

**Profiles/Roles** = Secure, role-specific workflows

**Flows/Apex** = Eliminate manual tasks while handling complex logic

**Email Tools** = Ensure timely, branded customer interactions

This combination creates a scalable, user-friendly system tailored to retail needs.

# 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.



Use this page to sign up for a special Developer Edition org with the configuration you need to complete the superbadge challenges.

Create a username, in the form of an email, that is entirely unique across all Salesforce orgs, including trial and Sandbox orgs. For more information, check out [Usernames and Passwords](#) help article.

Note that special orgs are generally available within a matter of minutes but may take up to 30 minutes to populate. You will receive an email letting you know when the org is ready. Build your solution according to the requirements to complete the superbadge challenges; adding more actions or steps can cause challenge checks to fail.

A screenshot of the Salesforce Developer Edition signup form. The form is set against a blue background. It contains several input fields and dropdown menus, all marked with an asterisk as required. The fields are: First Name, Last Name, Email address (pre-filled with 'example@yourcompany.com'), Role (dropdown menu with 'Your Job Role' selected), Company, Country (dropdown menu with 'United States' selected), Postal Code, and Username (pre-filled with 'Ex: name@yourcompany.com'). At the bottom, there is a checkbox for agreeing to the Terms of Use and Master Subscription Agreement, which is currently unchecked.

\* First Name

\* Last Name

\* Email address

\* Role

\* Company

\* Country

\* Postal Code

\* Username

☐ By registering, you confirm you have read and agree to the [Terms of Use](#) and the [Master Subscription Agreement](#) and agree that my data is

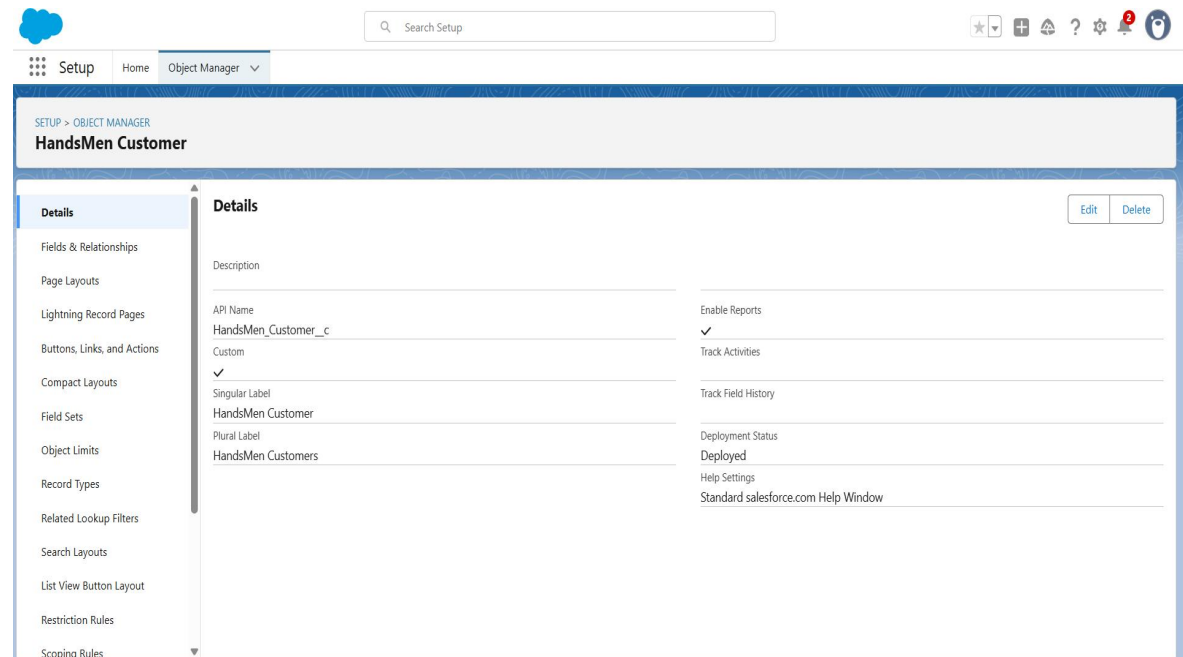
## 2. Custom Object Creation

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 ↶  
  
 Enter a valid email address, such as name@email.com.


Phone

Loyalty Status

FirstName

LastName

Total Purchases

Owner  
 Gedela Ujwala

❌ We hit a snag.

Review the following fields
 

- [Email](#)

## 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

Users

User Edit

Niklaus Mikaelson

Help for this Page

User Edit

Save Save & New Cancel

General Information

Required Information

First Name

Niklaus

Last Name

Mikaelson

Alias

nmika

Email

gedelaujwala@gmail.com

Username

gedelaujwala12@gmail.com

Nickname

User175310385401017896

Title

Company

Department

Division

Role

Sales

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 (Classic Only)

☐

## 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

Classic Email Templates

HTML Email Template

Order\_Confirmation\_Email

Help for this Page

Preview your email template below.

Email Template Detail

Edit Properties Edit HTML Version Edit Text Version Delete Clone

Email Templates from Salesforce

Unified 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

Gedela Ujwala [Change]

Description

Created By

Gedela Ujwala 7/21/2025, 6:52 AM

Modified By

Gedela Ujwala 7/21/2025, 6:52 AM

Edit Properties Edit HTML Version Edit Text Version Delete Clone

Email Template

Send Test and Verify Merge Fields

Subject

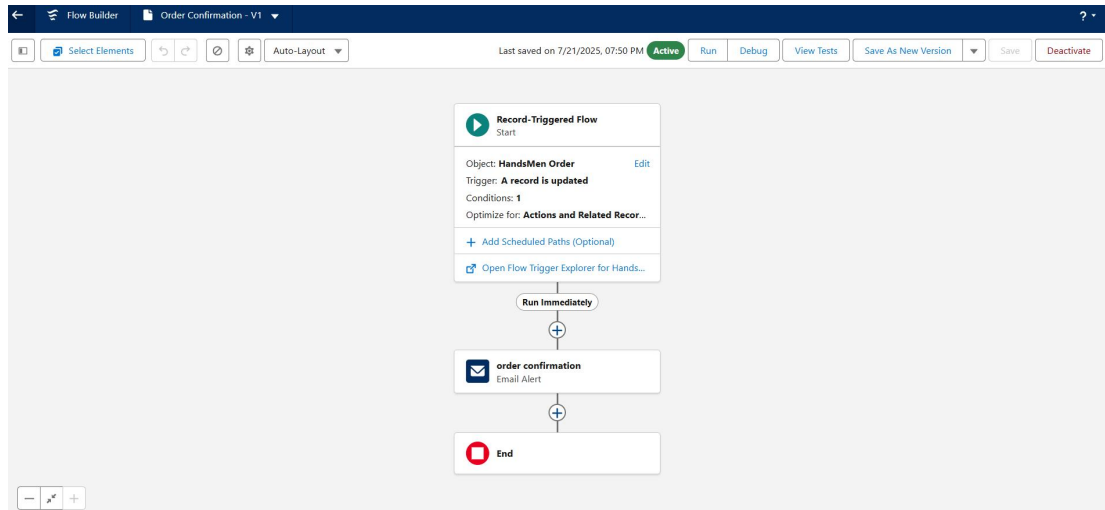
Your Order has been Confirmed

HTML Preview

## 8. Flow Implementations

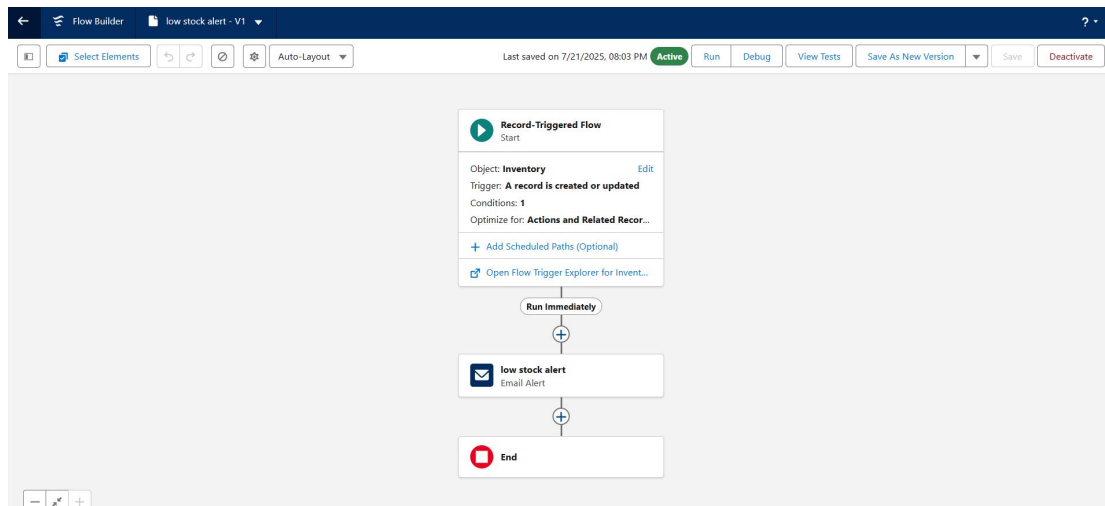
### a. Order Confirmation Flow

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



### b. Stock Alert Flow

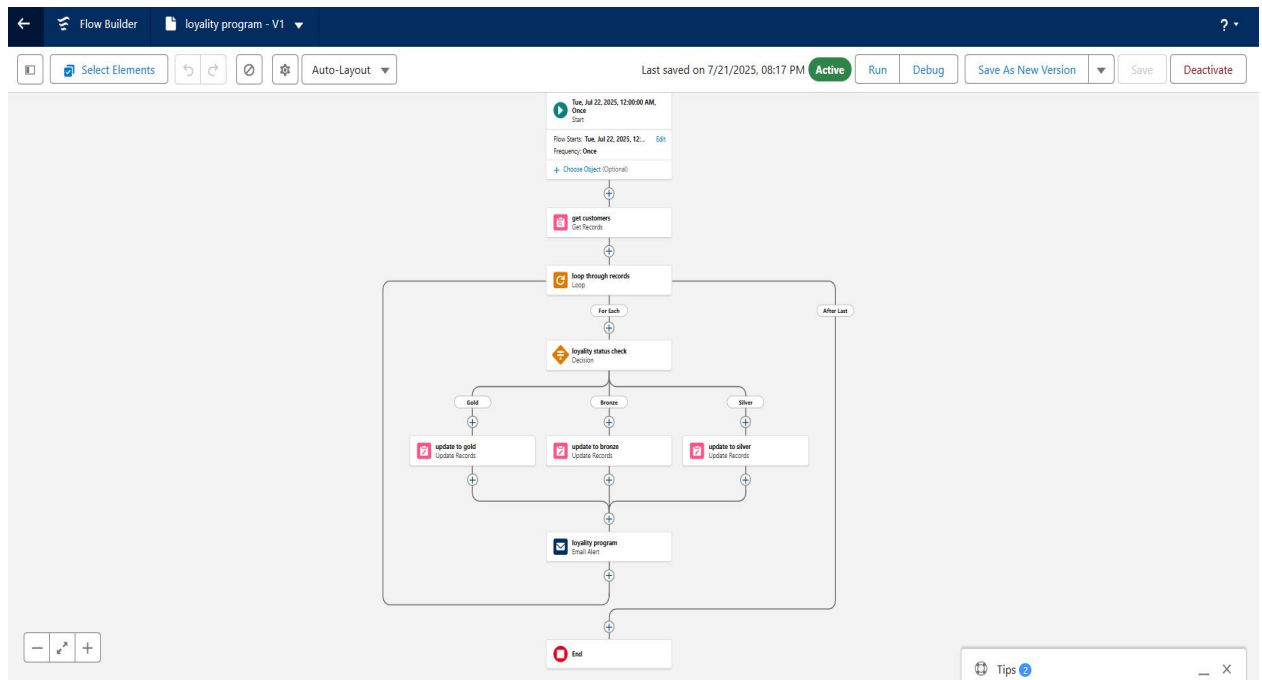
- Triggered when Inventory stock drops below 5.
- Sends low stock email to Inventory Manager.



### 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 SCENARIO

### 1. NEW CUSTOMER ONBOARDING

*Scenario:* Fashion influencer "Elijah Mikaelson" visits HandsMen Threads' flagship store

*System Action:*

- Sales associate creates a new Customer record with:

Personal details (phone, email etc)

Style preferences (favorite colors, preferred fits)

- *Validation Rule:* Ensures the email is valid (eg, must contain @gmail.com).
- *Automation:* Welcome email with ₹500 discount coupon triggers immediately

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

## **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:
  - 2500 Bronze
  - 2500-21000 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:

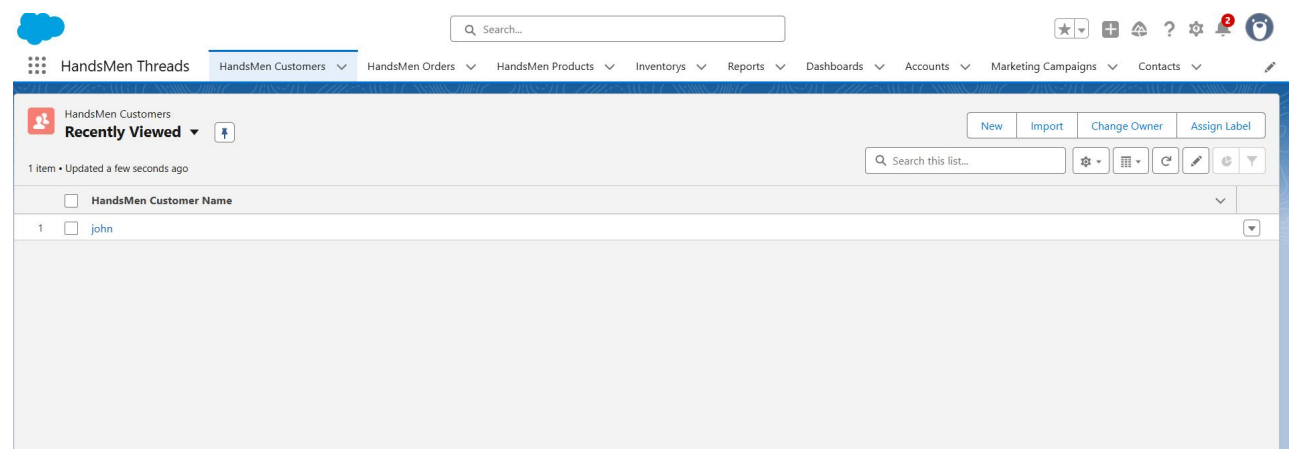
"Thanks for your purchase! Your loyalty status is now Silver."

## 7. Users and Roles

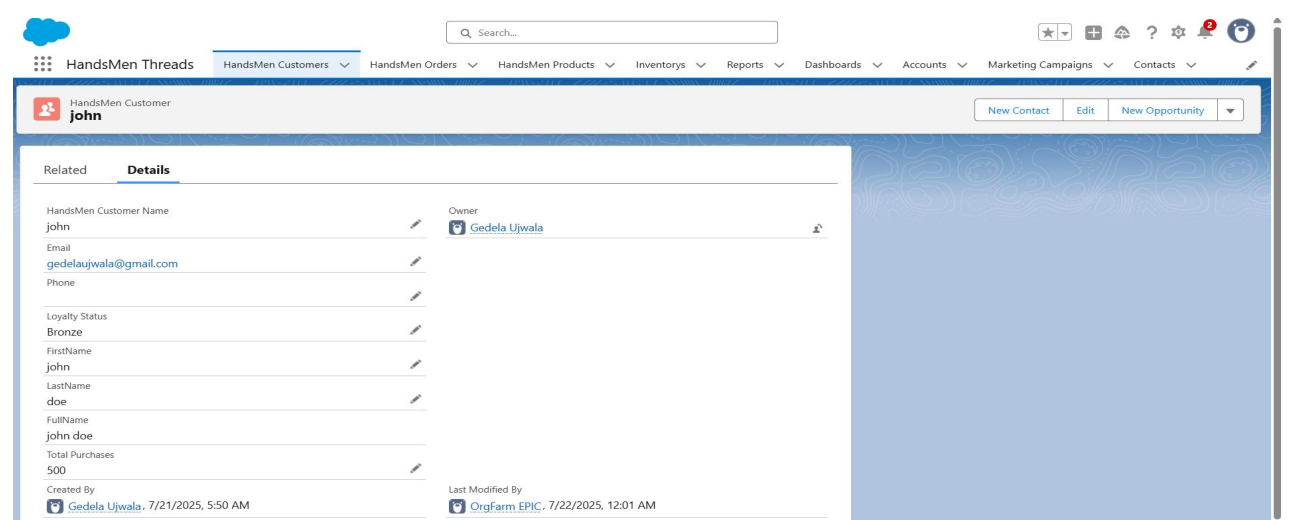
Salesforce users like store staff are created :

- Niklaus Mikaelson - Soles Role (Platform 1 Profile)
- Kol Mikaelson laventory Role (Platform I Profile)

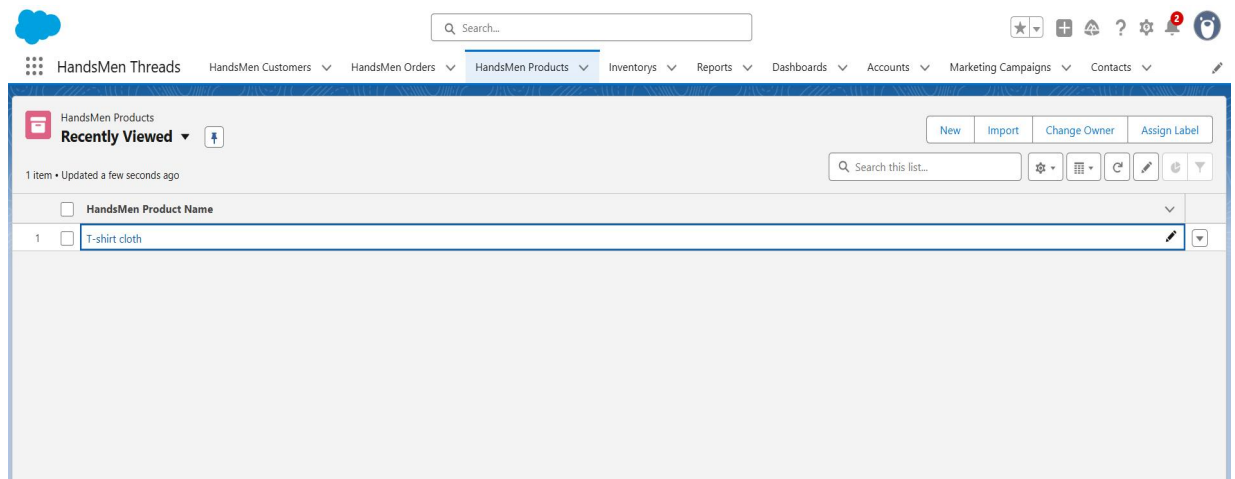
## SCREENSHOTS



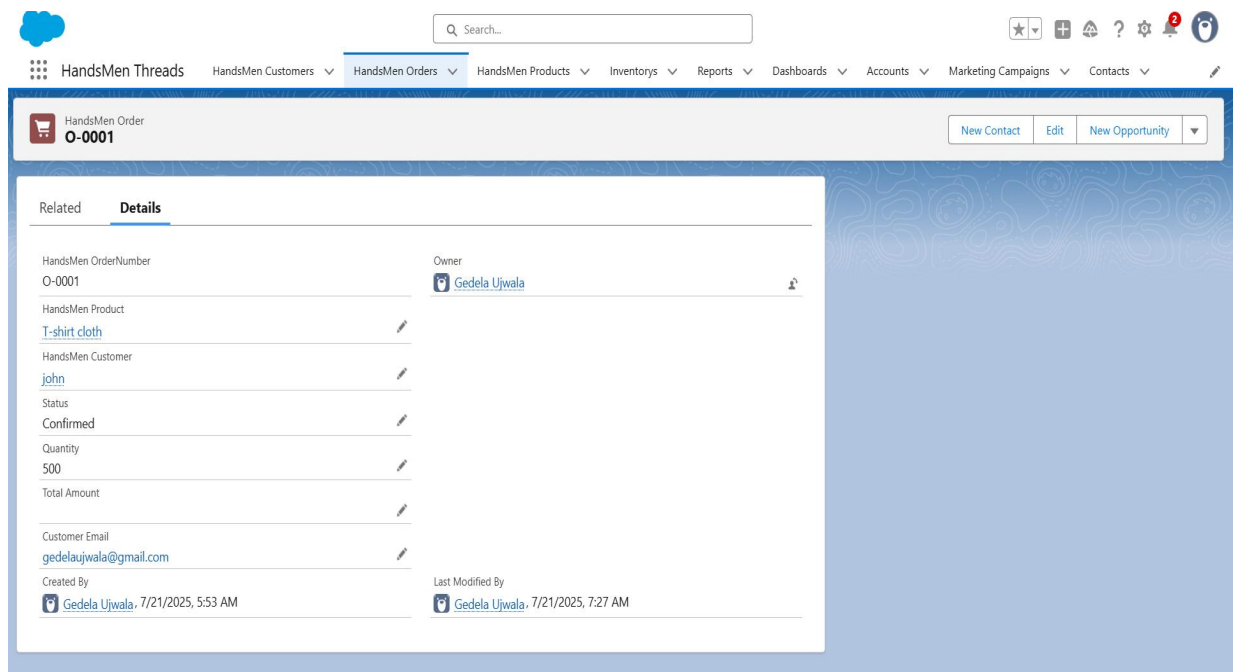
**Fig: Custom App for HandsMen Threads**



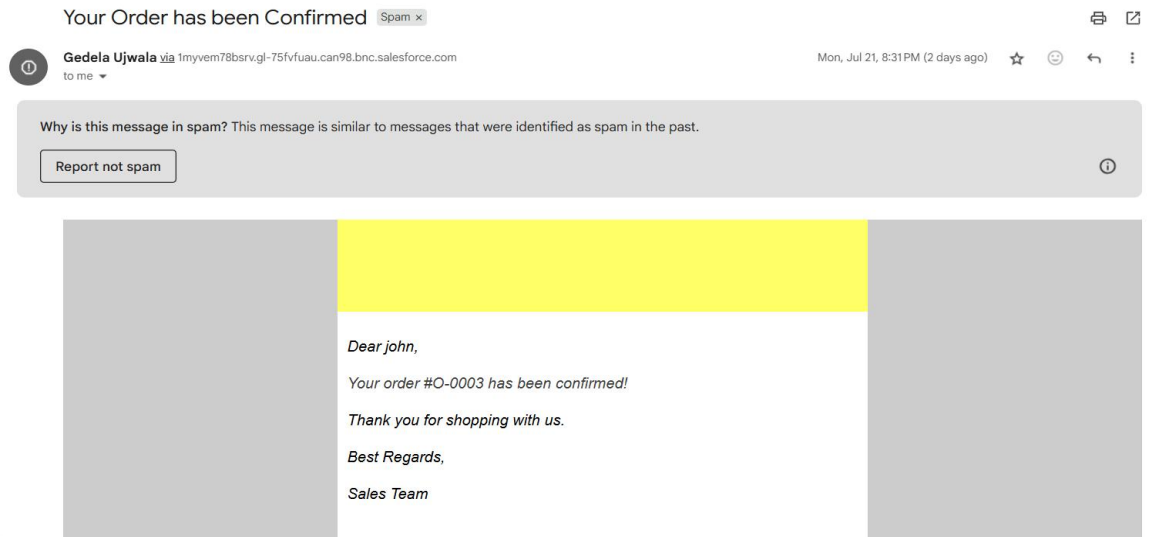
**Fig: Customer Creation in HandsMen Threads**



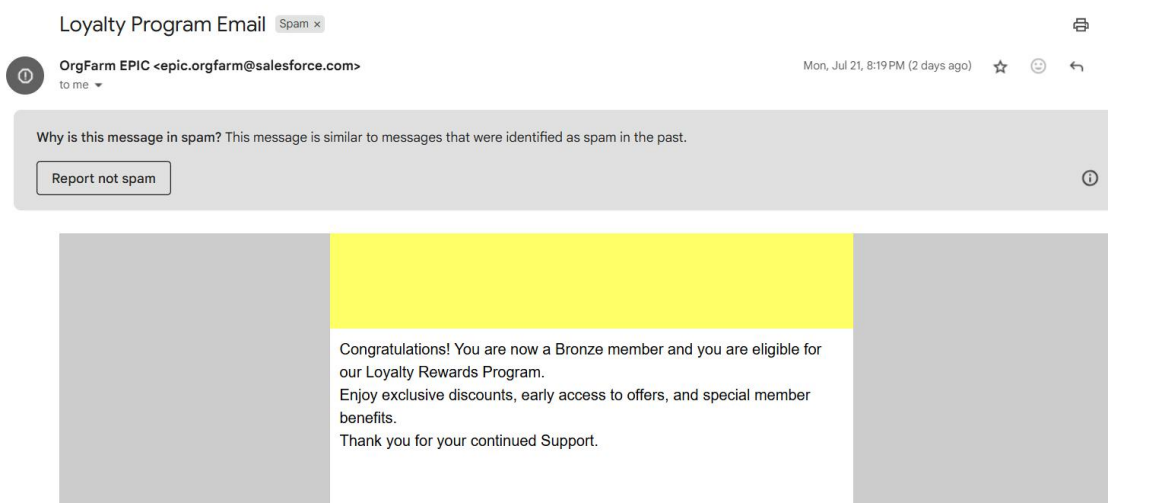
**Fig: Products in HandsMen Threads**



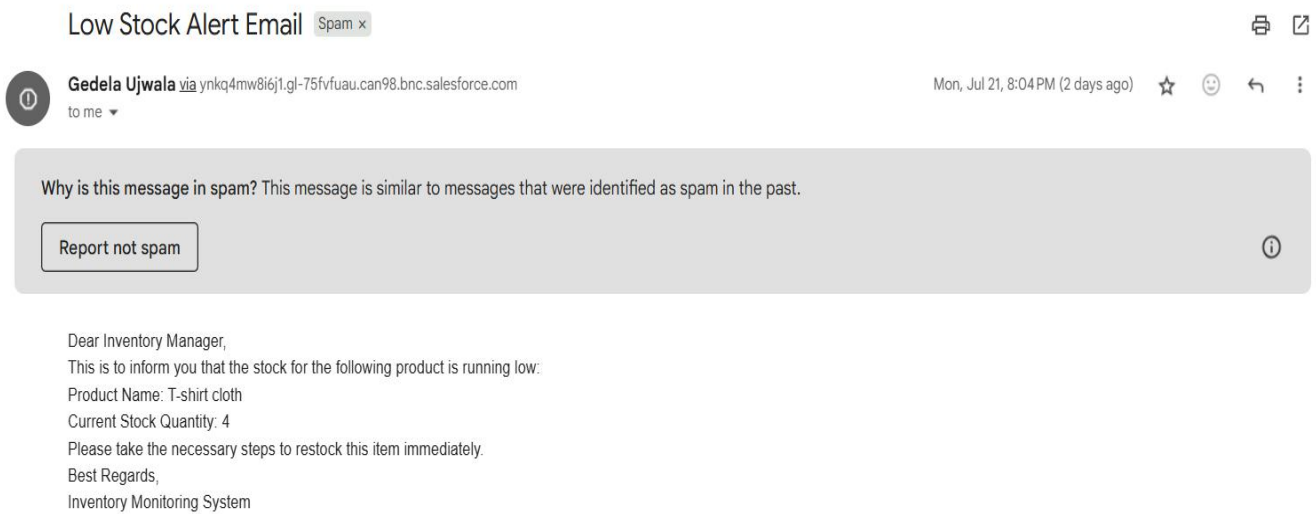
**Fig: Order Confirmation**



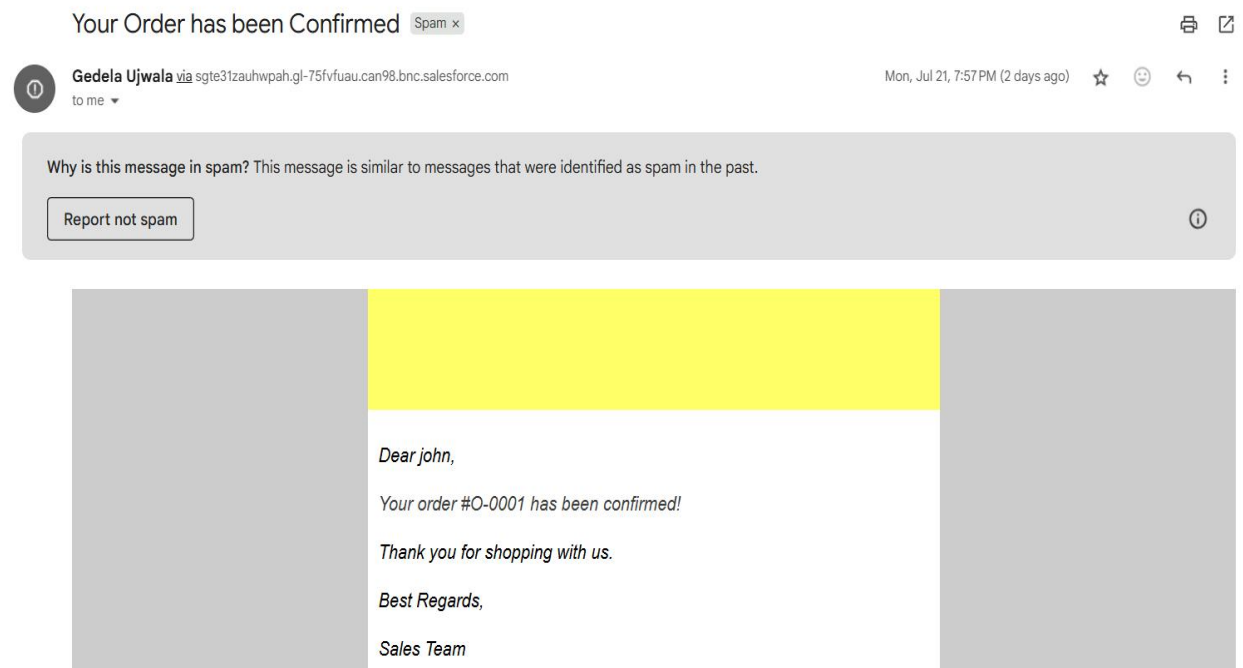
**Fig: Order Confirmation mail alert**



**Fig: Loyalty Program mail alert**



**Fig: Low stock mail alert**



**Fig: Customer Order confirmation mail alert**

## **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 & Dashboards**

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.