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

ABSTRACT

This project details the end-to-end implementation of a tailored Salesforce CRM solution for HandsMen Threads, a premium brand specializing in men's fashion and bespoke tailoring. The primary objective was to streamline operations, enhance customer engagement, and ensure consistent data integrity across departments.

The solution architecture is centered around a robust custom data model comprising five core objects: Customer, Order, Product, Inventory, and Marketing Campaign. Key business processes were automated using Salesforce tools such as Record-Triggered Flows, Scheduled Flows, Email Alerts, and Apex Code to manage order confirmations, customer loyalty status updates, and real-time inventory alerts.

To uphold data reliability and governance, validation rules and a role-based security model were implemented for Sales, Inventory, and Marketing teams. Additionally, a scheduled Apex batch job was developed to proactively update and monitor low-stock inventory levels.

OBJECTIVE

The main objective of this project is to design and deploy a tailored Salesforce CRM solution for HandsMen Threads to optimize core business operations, uphold data consistency, and elevate customer satisfaction.

By establishing a centralized platform to manage customers, orders, products, inventory, and marketing initiatives, the project aims to:

- Automate essential processes such as order confirmations, loyalty tier updates, and inventory alerts.

- Enforce accurate and uniform data input through validation rules.

- Provide real-time access to inventory levels and customer engagement.

- Strengthen team collaboration via role-based access controls.

TECHNOLOGY DESCRIPTION

Salesforce: -

Salesforce is a cloud-based Customer Relationship Management (CRM) platform that enables businesses to manage customer data, automate workflows, and enhance sales, marketing, and service processes. It offers both declarative (point-and-click) tools and programmatic features like Apex and Flows to create tailored business solutions.

Custom Objects: -

In Salesforce, objects function like database tables. Custom Objects are created to store business-specific data.
Examples:

- Customer__c – Stores customer details
- Product__c – Contains product information
- Order – Records order data

Tabs: -

Tabs provide a user interface to access and manage object data within Salesforce.
Example: A tab for Product__c lets users view and manage product records directly.

Custom App: -

A Custom App in Salesforce groups related tabs to support a specific business function, offering users a focused workspace.

Profiles: -

Profiles define what a user can see, do, and edit in Salesforce. It controls object permissions, field access, and more.

Roles: -

the data 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 enforce that data entered into Salesforce meets specific business requirements.
Examples**:**

- Email must include "@gmail.com"

- Stock quantity cannot be negative

Email Templates:

Email Templates are predefined formats used to send consistent messages to customers or internal users.
Example**:**

- "Order Confirmation" template

Email Alerts:

Email Alerts are automated actions in Flows or Workflow Rules that use templates to send emails.
Example**:**

- Send an email when a customer's loyalty level is updated

Flows:

Flows are no-code automation tools in Salesforce used to perform actions like creating records, updating fields, or sending notifications.
Example**:**

- A flow triggers an email alert when a new order is placed

Apex:

Apex is Salesforce's object-oriented programming language used to implement custom business logic.
Example Triggers**:**

- Update Total_Amount__c field in Orders

- Decrease stock count in Inventory

Detailed Execution of Project Phases

1. Developer Org Setup

A Salesforce Developer Org was created via https://orgfarm-398ea3eb70-dev-ed.develop.my.salesforce.com. The account was verified, a password was set, and access was granted to the Salesforce Setup dashboard.
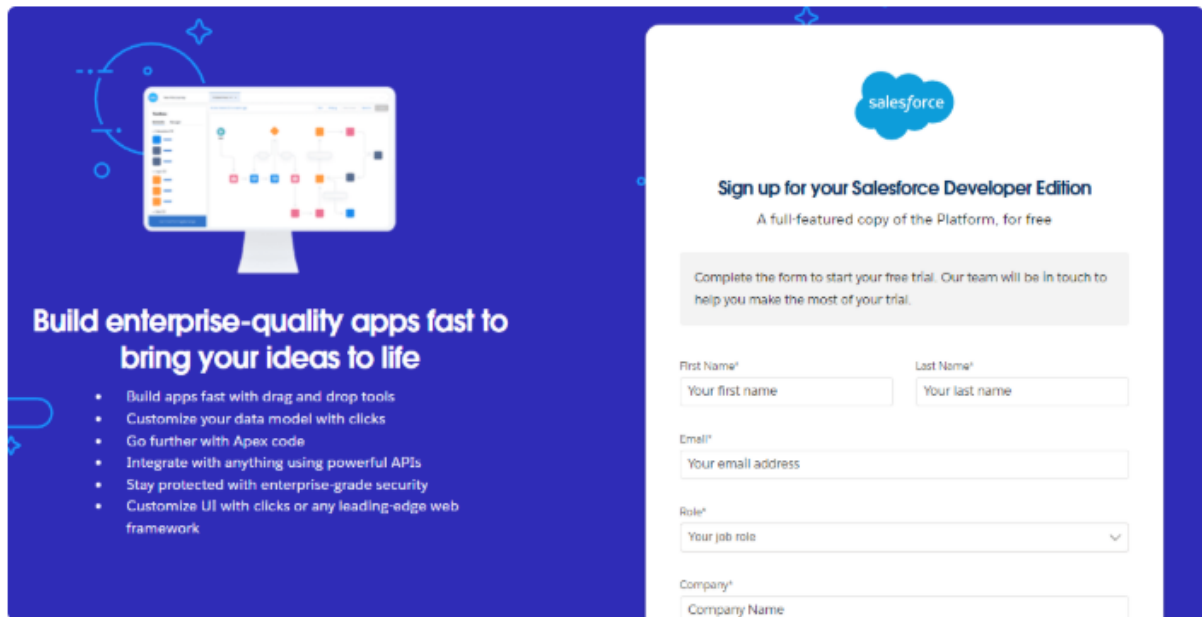
2. Custom Object Creation

Five custom objects were created to manage key business data:

- **HandsMen Customer** – Stores customer details such as email, phone number, and loyalty status.

- **HandsMen Product** – Contains product catalog information like SKU, price, and available stock.

- **HandsMen Order** – Records customer orders, including product quantity and order status.

- **Inventory** – Tracks current stock levels and warehouse locations.

- **Marketing Campaign** – Maintains details of promotional campaigns and their schedules.

Steps Followed:

- Navigated to **Setup → Object Manager → Create Custom Object**
- Entered label and object name, enabled reports and search features, saved, and created Tabs for each object.

HandsMen Customer

Details	
Fields & Relationships	
Page Layouts	
Lightning Record Pages	
Buttons, Links, and Actions	
Compact Layouts	
Field Sets	
Object Limits	
Record Types	
Related Lookup Filters	
Search Layouts	
List View Button Layout	
Restriction Rules	
Scoping Rules	

Details

Edit   Delete

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

3. Creating the Lightning App

- A custom Lightning App named HandsMen Threads was developed.
- It included tabs for: HandsMen Customer, Order, Product, Inventory, Campaign, and Reports.
- The app was assigned to the System Administrator profile.

4. Validation Rules

To maintain data accuracy and enforce business rules, the following validation rules were implemented:

- **Order Object:** Prevent saving if Total_Amount__c is 0.
  Error: "Please Enter Correct Amount"
- **Customer Object:** Ensure the email field contains "@gmail.com".
  Error: "Please fill Correct Gmail"

5. User Role & Profile Setup

The Standard User profile was cloned to create a new profile named Platform 1, with access granted to required custom objects.
Roles were created to represent key departments:
- **Sales Manager**
- **Inventory Manager**
- **Marketing Team**

6. User Creation

Users were added to Salesforce and assigned relevant roles and profiles based on their responsibilities:
- **Niklaus Mikaelson** – Assigned to the **Sales** role

- **Kol Mikaelson** – Assigned to the **Inventory** role

These role-based assignments ensure controlled data access and proper process management within the system.

7. Email Template & Alerts

Three email templates were created:

- **Order Confirmation** – Triggered when an order status is set to "Confirmed"

- **Low Stock Alert** – Sent when inventory falls below 5 units

- **Loyalty Program Email** – Triggered upon changes in customer loyalty status

Corresponding **Email Alerts** were configured using these templates and integrated into automation flows.
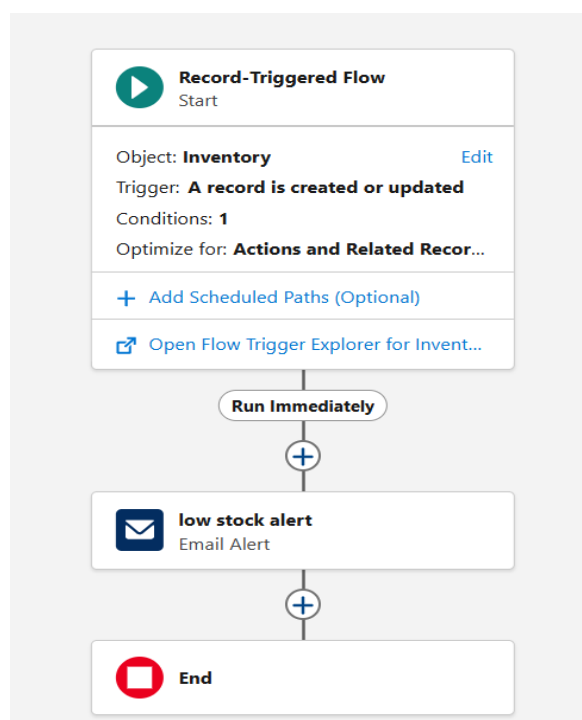
8. Flow Implementations
a. Order Confirmation Flow

- Triggered when an order status is updated to "Confirmed".
- Automatically sends an **Order Confirmation** email to the associated customer.
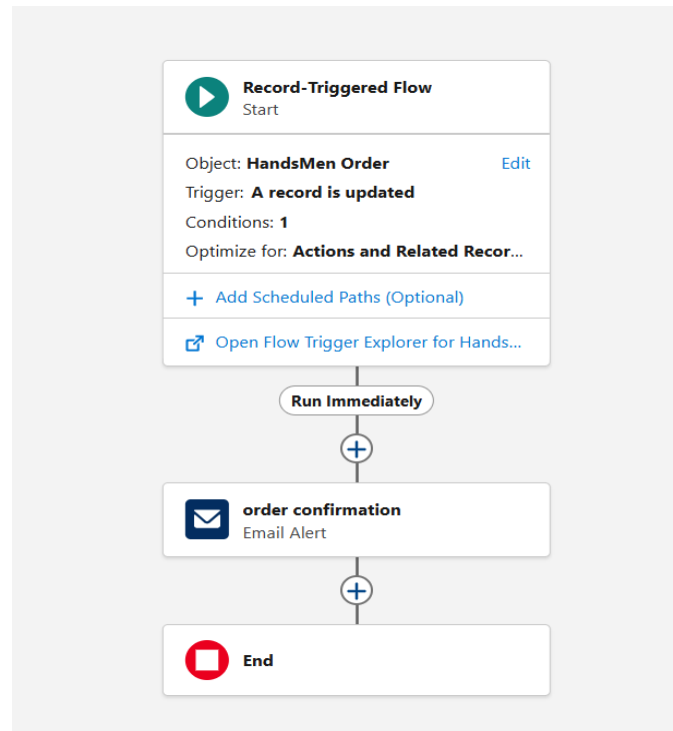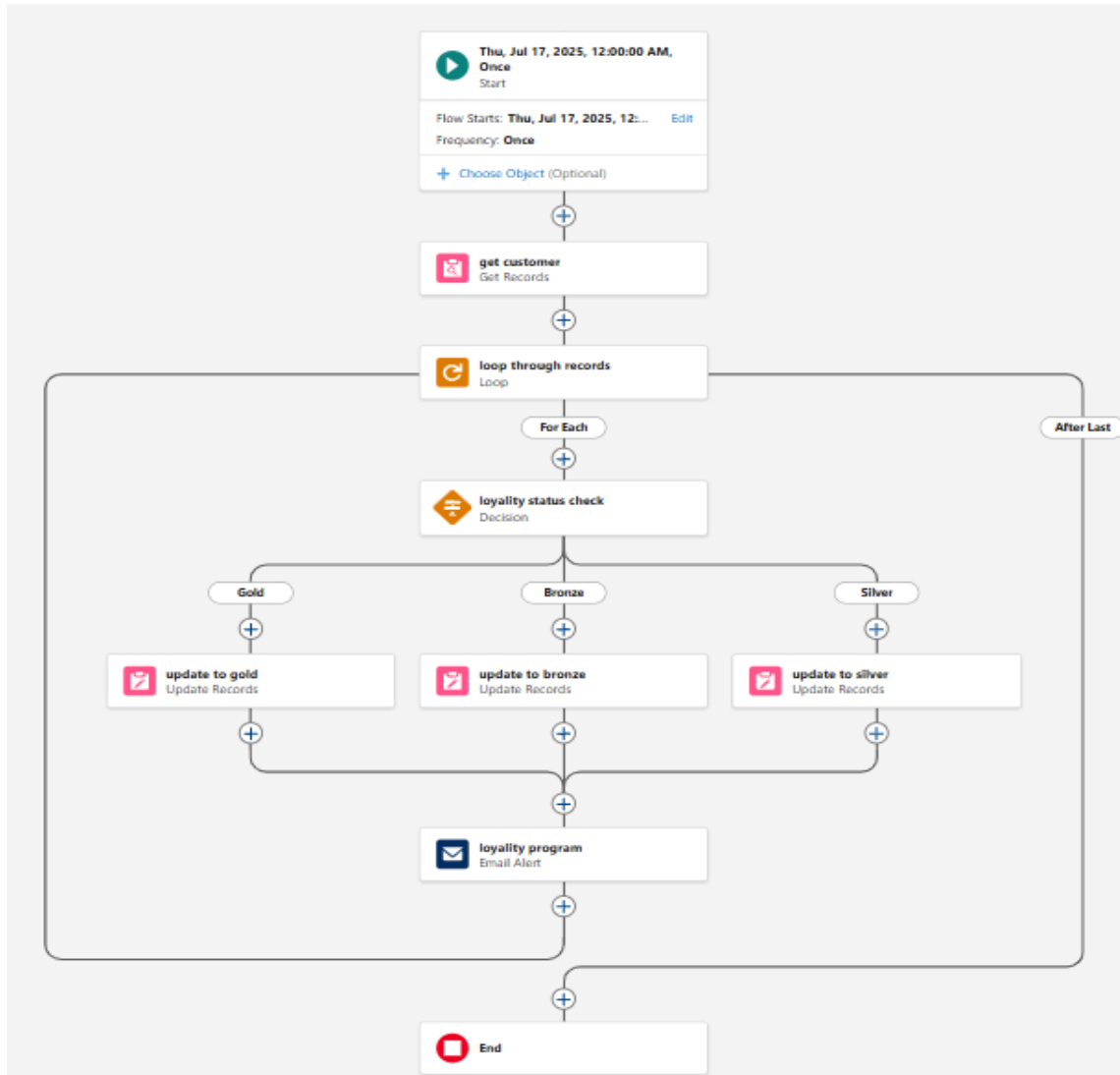

b. Stock Alert Flow

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

c. Scheduled Flow: Loyalty Update

- Executes daily at midnight.
- Iterates through customer records and updates **Loyalty Status** based on their total purchase amount.

9. Apex Triggers

- Order Total Trigger: Automatically calculates the total amount using quantity and unit price.
- Stock Deduction Trigger: Decreases inventory stock when an order is placed.
- Loyalty Status Trigger: Updates a customer's loyalty status based on their cumulative purchases.

Project Explanation with Real-World Example

1. **Customer Registration**

   - A customer named Elijah Mikaelson visits the store or website.
   - In Salesforce: A new record is added to the Customer object with his name, phone number, email, and other details.

2. **Product Setup**

   - The admin adds products like Shirts**,** Jeans, etc., into the Product__c object.
   - Each product includes pricing and related details.
   - An Inventory record is also created to track stock levels for each product.

3. Order Placement

   - Elijah places an order for 2 shirts priced at ₹500 each.
   - In Salesforce: A new record is created in the Order object.
   - Apex Trigger**:** Automatically calculates Total_Amount__c = 2 × 500 = ₹1000.

4. **Inventory Update**

   Once the order is placed:
   - Apex Trigger on Inventory**:** Reduces shirt stock by 2 units.
   - Validation Rule**:** Prevents stock from falling below zero.

5. **Loyalty Program**
   - Elijah's total purchase reaches ₹1000.
   - An **Apex Trigger** on the Customer object evaluates total spending:

     - < ₹500 → Bronze

     - ₹500 – ₹1000 → Silver

     - > ₹1000 → Gold

   Based on this, Elijah is assigned silver status.

6. **Email Notifications**
   - When an order is placed or loyalty status changes:
   - A Flow + Email Alert is triggered.
   - Elijah receives an email:

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

7. Users and Roles
Salesforce users representing store staff are added:

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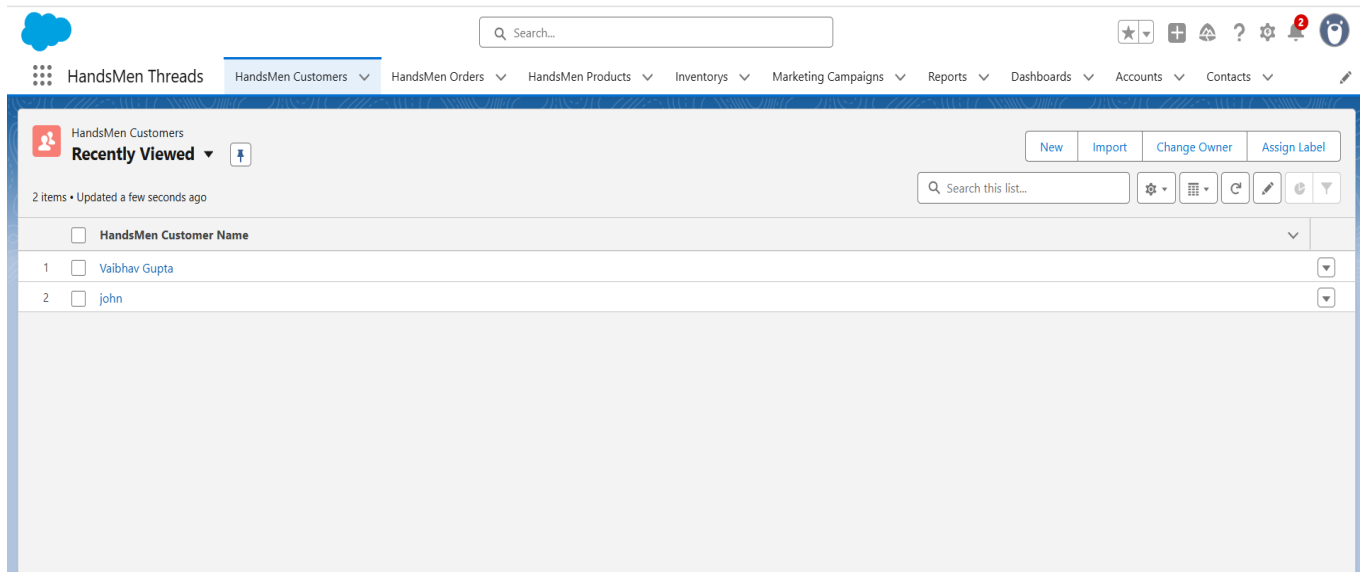
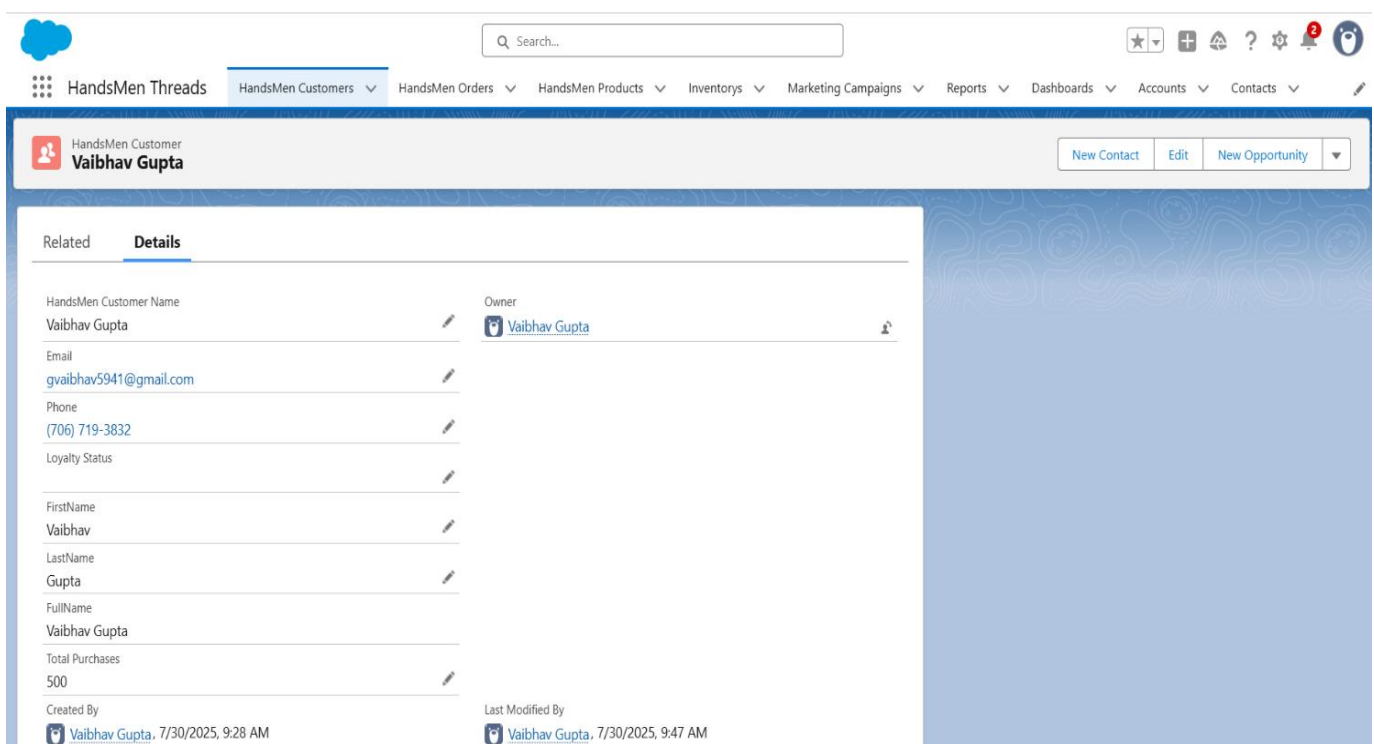# Screenshots

Fig: Custom App for HandsMen Threads

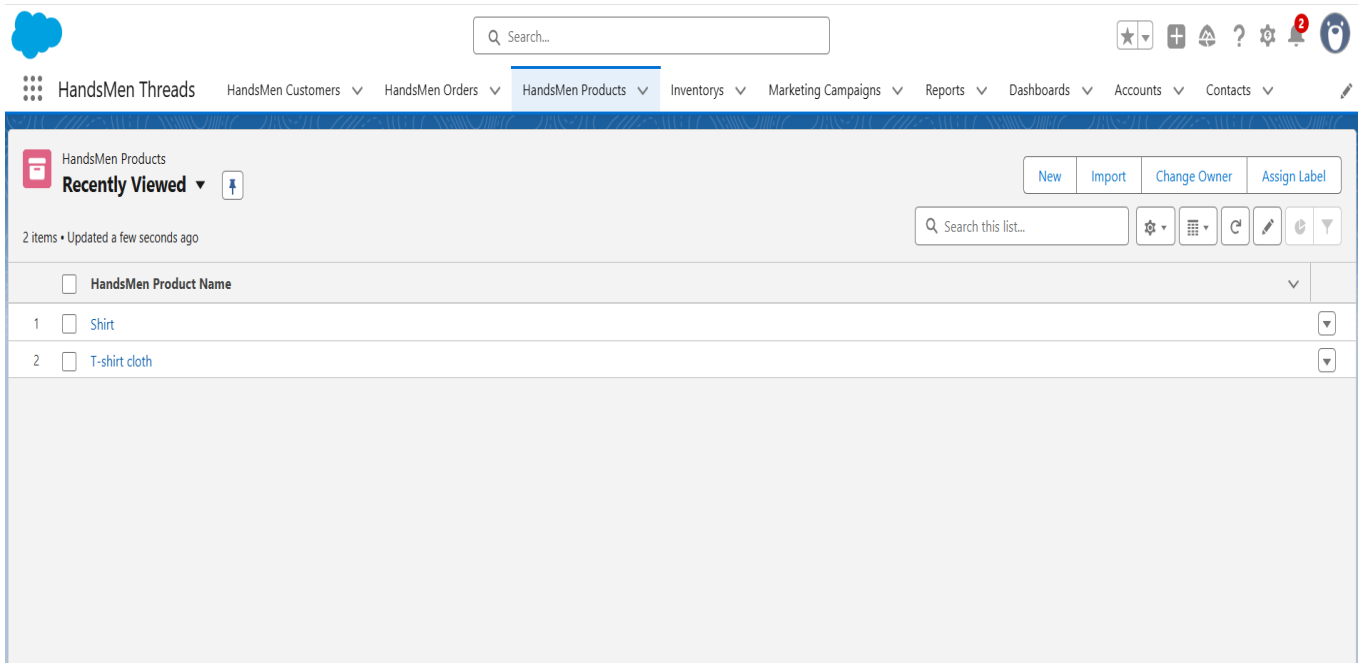**Fig: Customer Creation in HandsMen Threads**

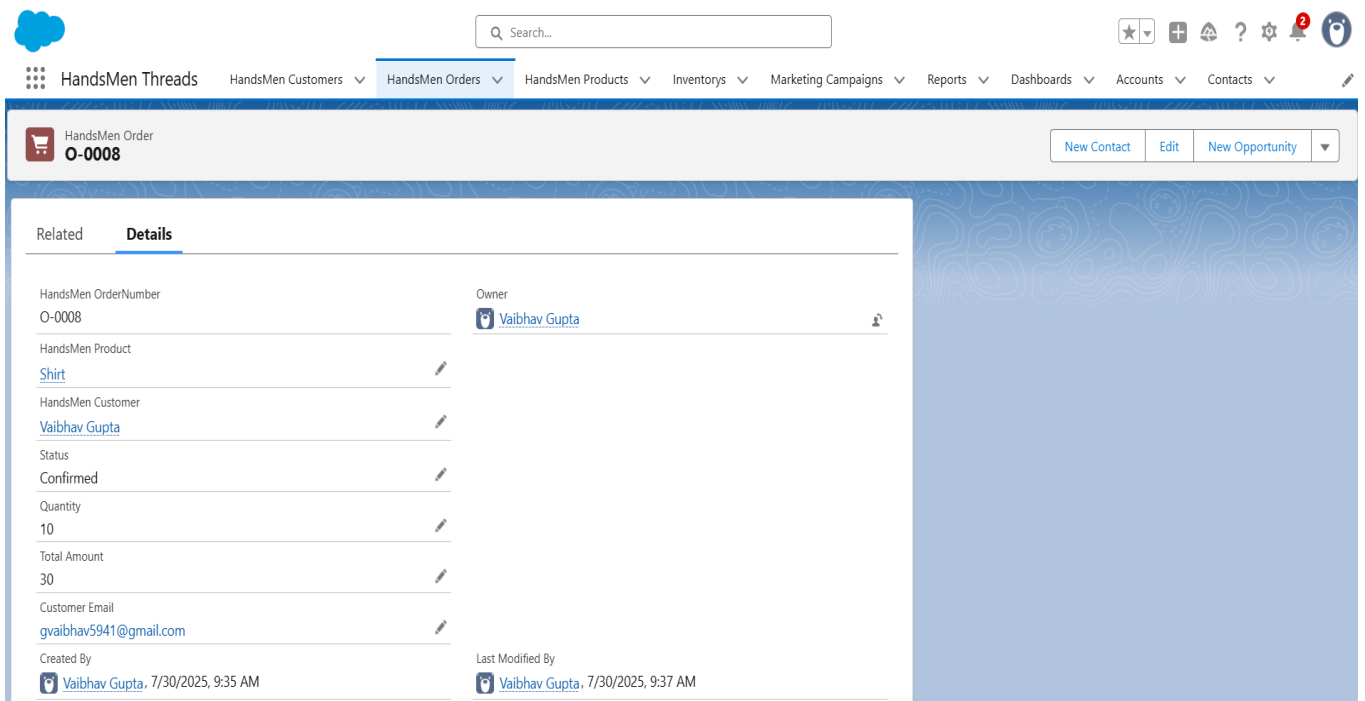**Fig: Order Confirmation**

Fig: Products in HandsMen Threads

Conclusion

The Salesforce-based CRM system for HandsMen Threads effectively streamlines essential business functions such as customer management, product cataloguing, order processing, inventory control, and loyalty program automation. By utilizing Salesforce components like Custom Objects, Flows, Validation Rules, Email Alerts, and Apex, the solution ensures accurate data entry, real-time updates, and improved customer engagement. With process automation and role-based access, the system reduces manual errors, accelerates operations, and offers valuable insights into sales and stock levels.

Future Scope: -

1. **Customer Portal Integration**
   Develop a Customer Community Portal where users can log in, view their orders, and monitor loyalty status.

2. **Mobile App using Salesforce Mobile SDK**
   Allow store staff to manage orders and inventory via a mobile-friendly interface.

3. **Reports & Dashboards**
   Design detailed dashboards to help management analyze sales trends and inventory performance in real time.

4. **AI-Powered Recommendations** (Einstein)
   Use Salesforce Einstein to suggest personalized products based on customer purchase history.

5. **WhatsApp/SMS Integration**
   Integrate messaging channels to notify customers about order updates and loyalty status changes via WhatsApp or SMS.