

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
- Improve 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.

Examples:

- 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.

Email Templates

Predefined formats for sending emails to customers or users.

Examples:

- "Order Confirmation" template
- "Low Stock Alert" template
- "Loyalty Program" 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.

Examples:

- Flow triggers email alerts on new order
- Scheduled flow for loyalty updates
- Stock alert automation

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
- Calculate loyalty status

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"

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.

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.

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:
 - Bronze: ≤ \$500
 - Silver: \$501 - \$1,000
 - Gold: > \$1,000

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 WITH REAL WORLD EXAMPLE

Business Scenario: Premium Suit Order Process

Customer Profile:

- Name: James Wellington
- Email: james.wellington@gmail.com
- Previous purchases: \$750 (Silver loyalty status)

Order Process Flow:

1. Product Selection:

- Product: Premium Italian Wool Suit
- SKU: IWS-2024-001
- Price: \$1,200
- Available Stock: 15 units

2. Order Creation:

- Customer places order for 1 suit
- Order status: "Pending"
- System automatically calculates total: \$1,200

3. Order Confirmation:

- Sales team changes status to "Confirmed"
- **Automated Actions Triggered:**
 - Order confirmation email sent to james.wellington@gmail.com
 - Inventory automatically reduced from 15 to 14 units
 - Customer's total purchases updated to \$1,950

4. Loyalty Status Update:

- At midnight, scheduled flow runs
- James's total purchases (\$1,950) exceed \$1,000
- Loyalty status automatically upgraded from Silver to Gold
- Congratulatory email sent about Gold status benefits

5. Inventory Management:

- If suit inventory drops to 4 units after multiple orders
- Low stock alert automatically sent to Inventory Manager
- Email includes: "Premium Italian Wool Suit stock is critically low (4 units remaining)"

Business Benefits Realized:

- **Customer Experience:** James receives immediate order confirmation and personalized loyalty communications
- **Operational Efficiency:** No manual calculations or status updates required
- **Inventory Control:** Proactive alerts prevent stockouts of premium items
- **Data Accuracy:** All calculations and updates happen automatically without human error
- **Scalability:** System handles multiple simultaneous orders and updates seamlessly

This real-world example demonstrates how the HandsMen Threads CRM solution transforms a traditional tailoring business into a modern, automated, and customer-centric operation while maintaining the premium service quality expected in luxury fashion retail.

SCREENSHOTS

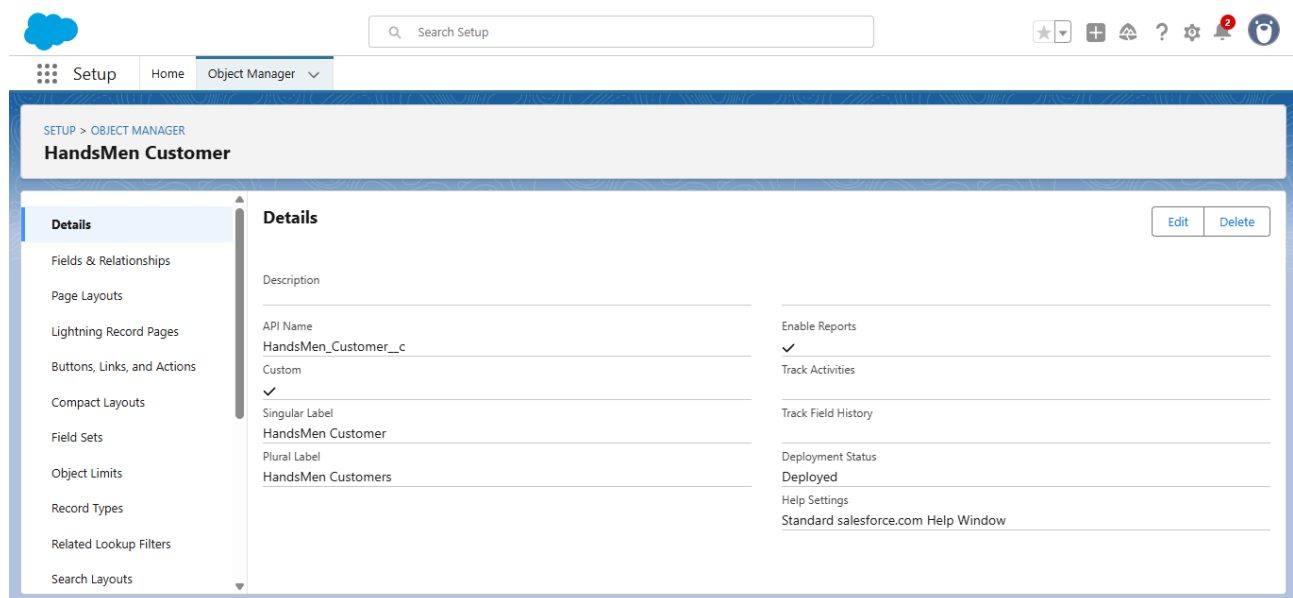


Fig1. Email Alert

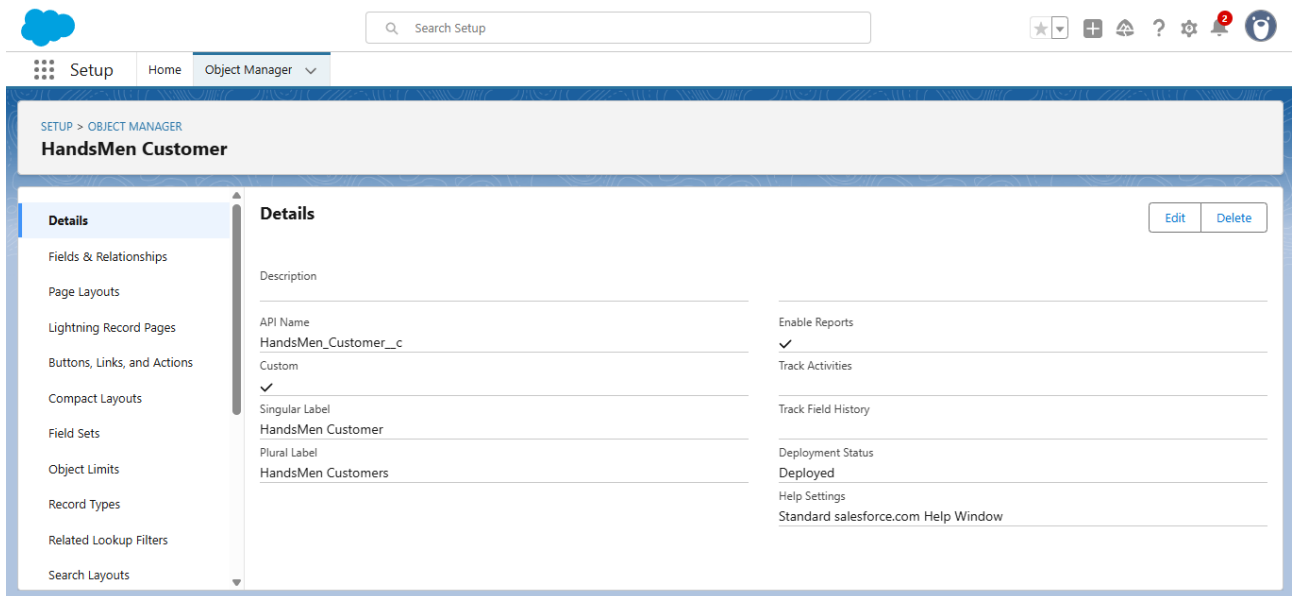


Fig2. Handsmen Customer

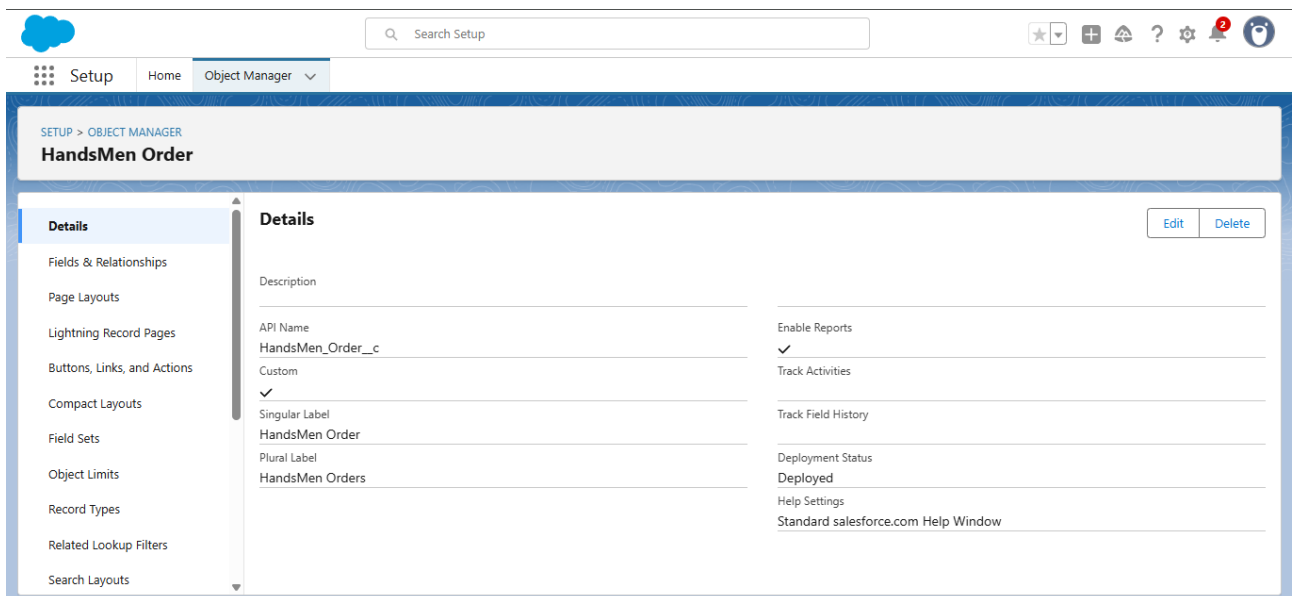


Fig3. Handsmen Order

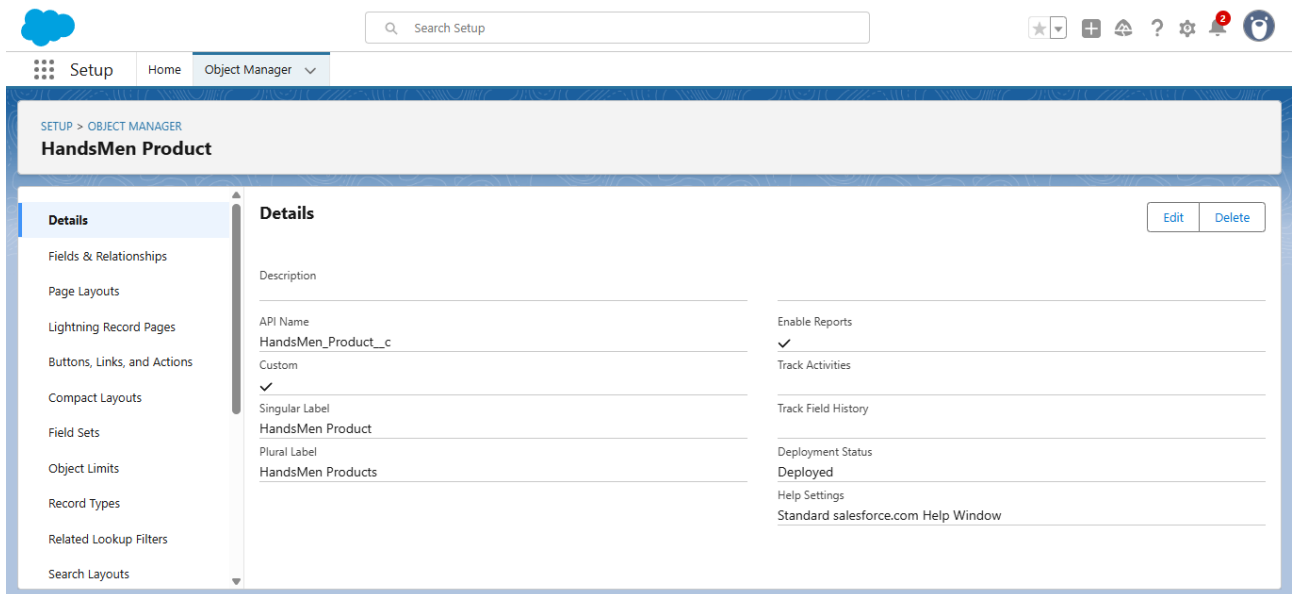


Fig4. Handsmen Product

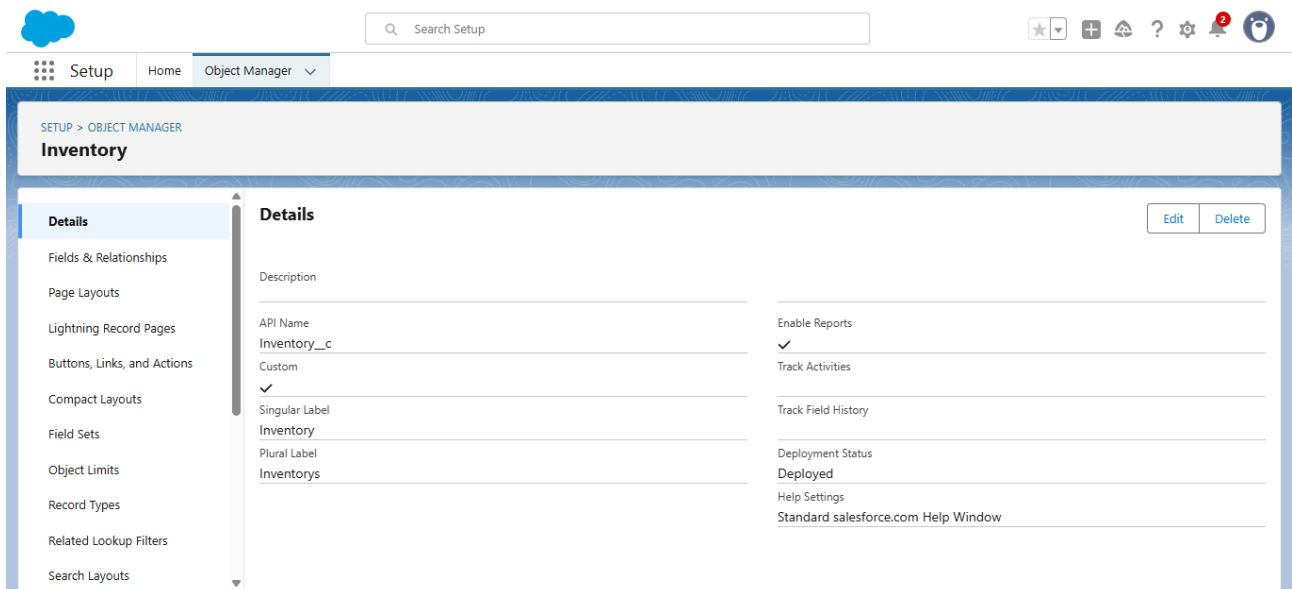


Fig5. Inventory

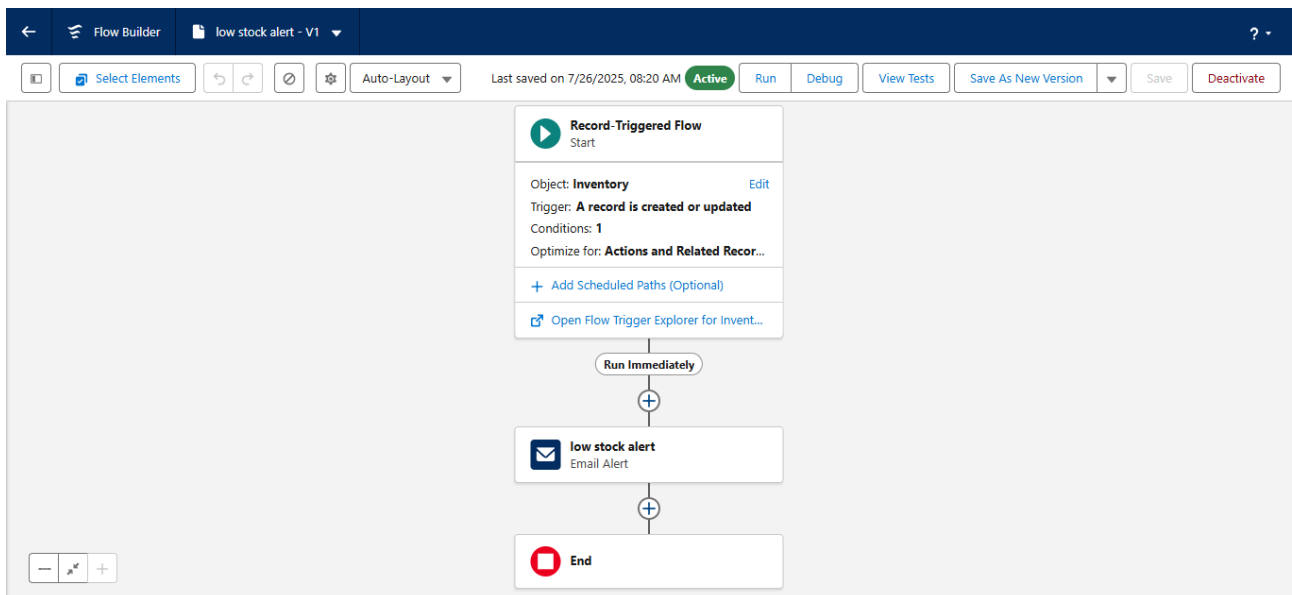


Fig6. Low Stock Alert Flow

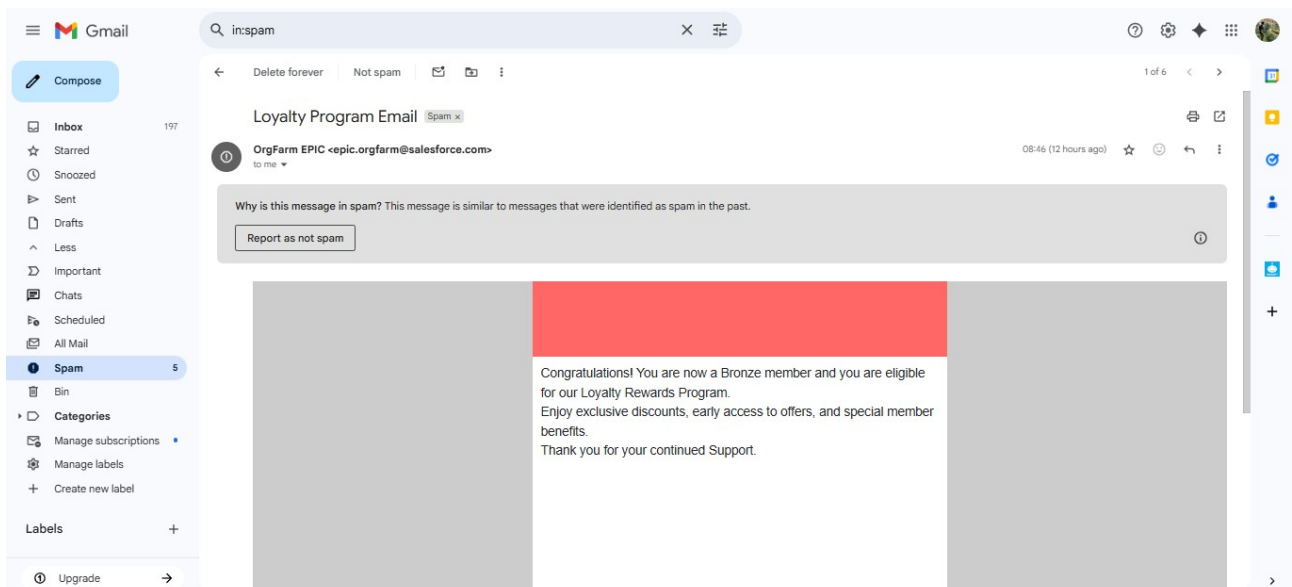


Fig7. Loyalty Program Email

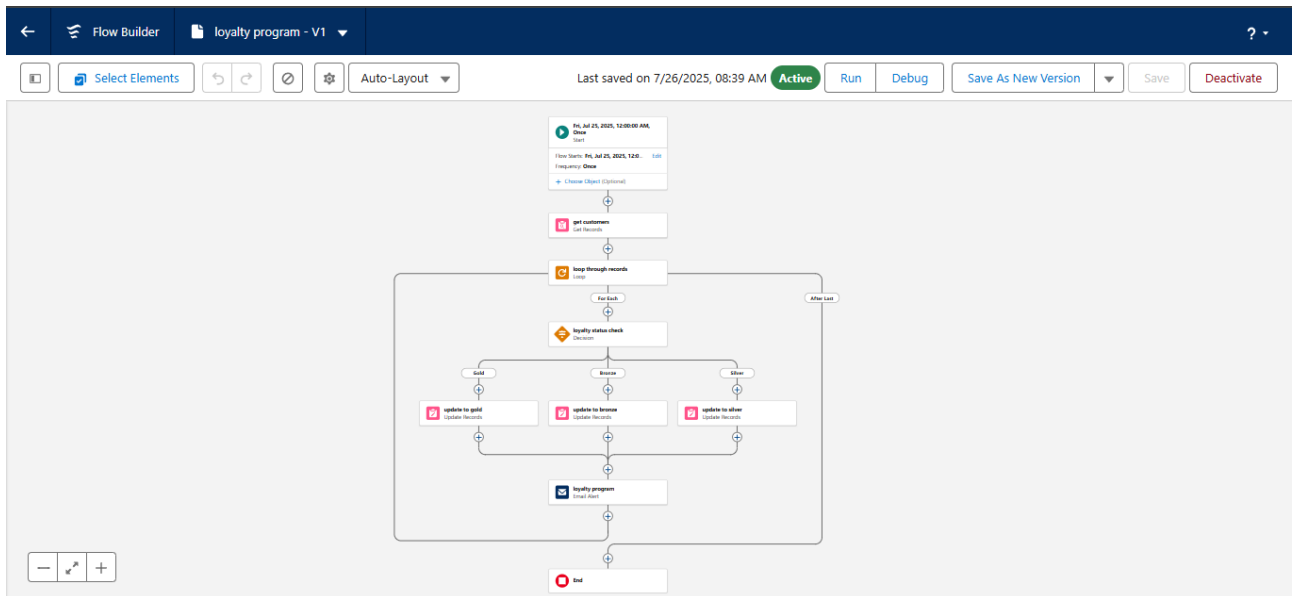


Fig8. Loyalty Program Flow

Setup > OBJECT MANAGER

Marketing Campaign

[Edit](#) [Delete](#)

Details

Description

API Name
Marketing_Campaign__c

Custom
✓

Singular Label
Marketing Campaign

Plural Label
Marketing Campaigns

Enable Reports
✓

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Fig9. Marketing Campaign

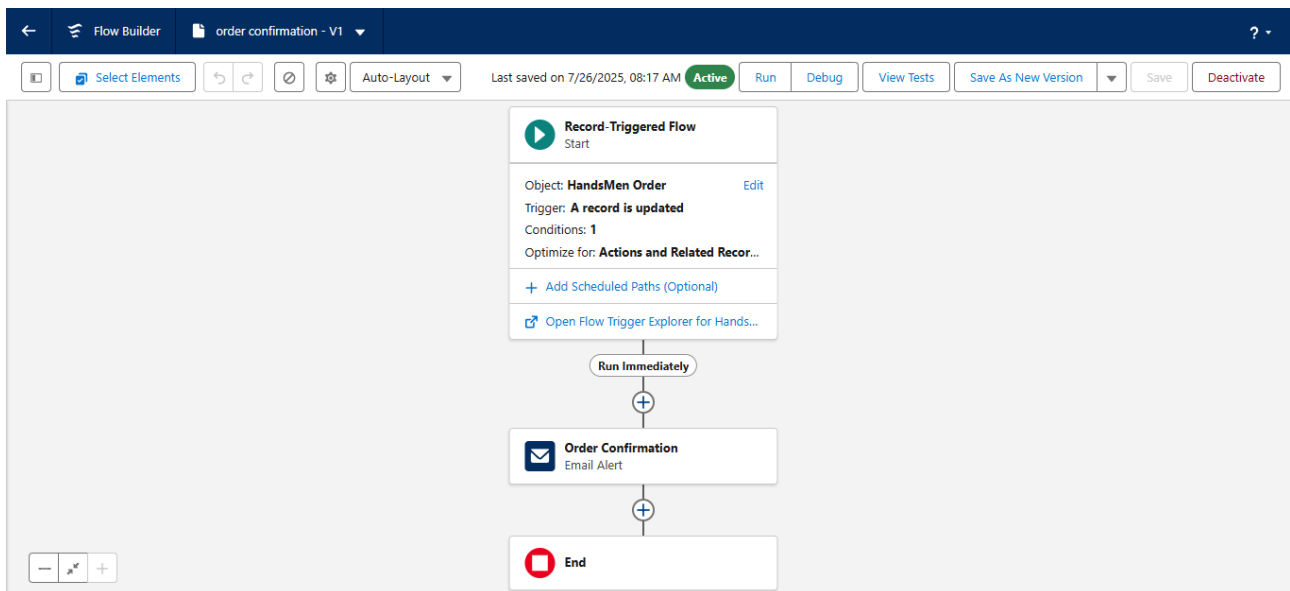


Fig10. Order Confirmation Flow

CONCLUSION

The HandsMen Threads Salesforce CRM implementation successfully addresses the unique challenges of a premium men's fashion business by combining automated workflows, data integrity controls, and personalized customer engagement. The solution provides a scalable foundation for business growth while maintaining operational excellence and customer satisfaction.