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

ABSTRACT

This project introduces the development of a customized Salesforce CRM solution for HandsMen Threads, a dynamic organization in the men's fashion industry. The primary goal of the project is to enhance data management, strengthen customer relationships, and streamline business operations through a unified and reliable platform. A robust data model was designed to store all essential business data while ensuring high levels of accuracy and consistency through UI-driven data validation.

The solution incorporates several automated business processes to optimize both customer engagement and internal operations. These includes key custom objects such as customer, order, product, inventory and marketing campaign. The business processes were automated using record-triggered flow, scheduled flows, email alerts, and apex to handle order confirmations, loyalty status update and proactive stock alerts.

To ensure clean and reliable data, validation rules were implemented, and a role-based security model was configured for the Sales, Inventory, and Marketing teams. The solution also features a scheduled Apex batch job that automatically updates low stock quantities.

This end-to-end CRM implementation enhances customer experience through personalized communication, strengthens operational efficiency through automation, and establishes a scalable foundation for long-term business growth on the Salesforce Platform.

OBJECTIVE

The primary objective of this project is to design and implement a customized Salesforce CRM solution for HandsMen Threads that streamlines core business operations, strengthens data management, and enhances overall customer satisfaction. By establishing a centralized platform to manage customers, orders, products, inventory, and marketing campaigns, the project aims to:

- **Streamline essential business processes** including order confirmations, loyalty status updates, and low-stock alerts to improve operational efficiency.
- **Maintain data accuracy and reliability** through the use of validation rules.
- **Enable real-time monitoring** of inventory levels and customer interactions.
- **Enhance internal collaboration** through role-based access controls.
- **Enhance customer experiences** by delivering personalized communication and loyalty initiatives.

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 to build custom business solutions.

Custom Objects:

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

- Customer__c – Stores customers information
- Product__c – Stores product details
- Order__c – Stores orders
- Inventory__c - Object stores and monitors stock quantities for each product variant.

Tabs:

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

Example: A tab for Product__c allows users to easily view and manage products records.

Custom App:

A Salesforce app is a collection of tabs grouped together to support a specific business process or function.

Profiles:

Profiles define what a user can view, edit, and perform in Salesforce. It controls object permissions, field access, page layouts, and more.

Roles:

Roles determine data visibility in the Salesforce's role hierarchy. They are primarily used for record sharing and reporting.

Permission Sets:

Permission sets grants additional permissions to users without changing their profile.

Validation Rules:

Validation Rules ensures that data entered into Salesforce meets business standards.

Example:

- Email must contain @gmail.com

Email Templates:

Predefined formats used when sending emails to customers or users.

Example:

- An "Order Confirmation" email template.

Email Alerts:

Email Alerts are automated actions triggered by Flows or Workflows Rules that sending emails using predefined templates.

Example: When a loyalty level changes an email is sent to the customer automatically.

Flows:

Flows automate business processes without code. They can create or update records, and send notifications.

Example:

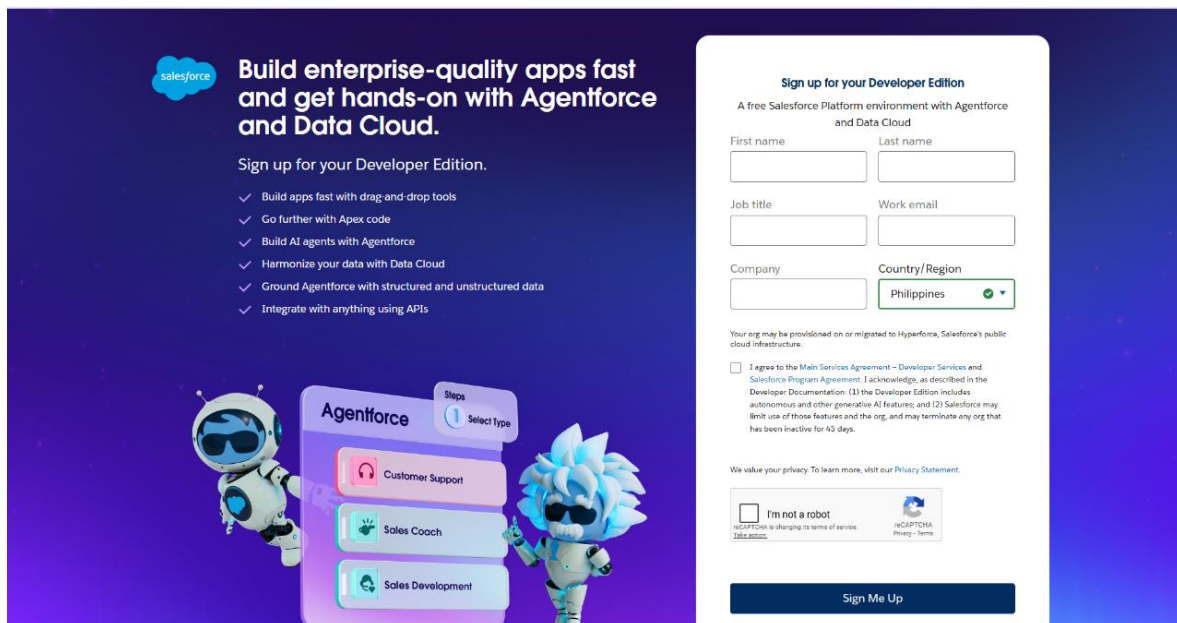- Flow triggers email alerts when a new order is created.

Apex:

Apex is Salesforce's object-oriented programming language used to write custom logic, automate advanced processes, and extend platform functionality.

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 information such as email, phone number, and loyalty status.
- **HandsMen Product** – Stores product catalog details including SKU, price, and stock availability.
- **HandsMen Order** – Stores customer orders, including quantities and order status.
- **Inventory** – Tracks stock levels and warehouse locations.
- **Marketing Campaign** – Stores promotional campaign details and scheduling information.

Steps Followed:

- Navigated to Setup → Object Manager → Create → Custom Object
- Provided the object label, name, and enabled reporting/search options
- Saved the custom object and created tabs for each object
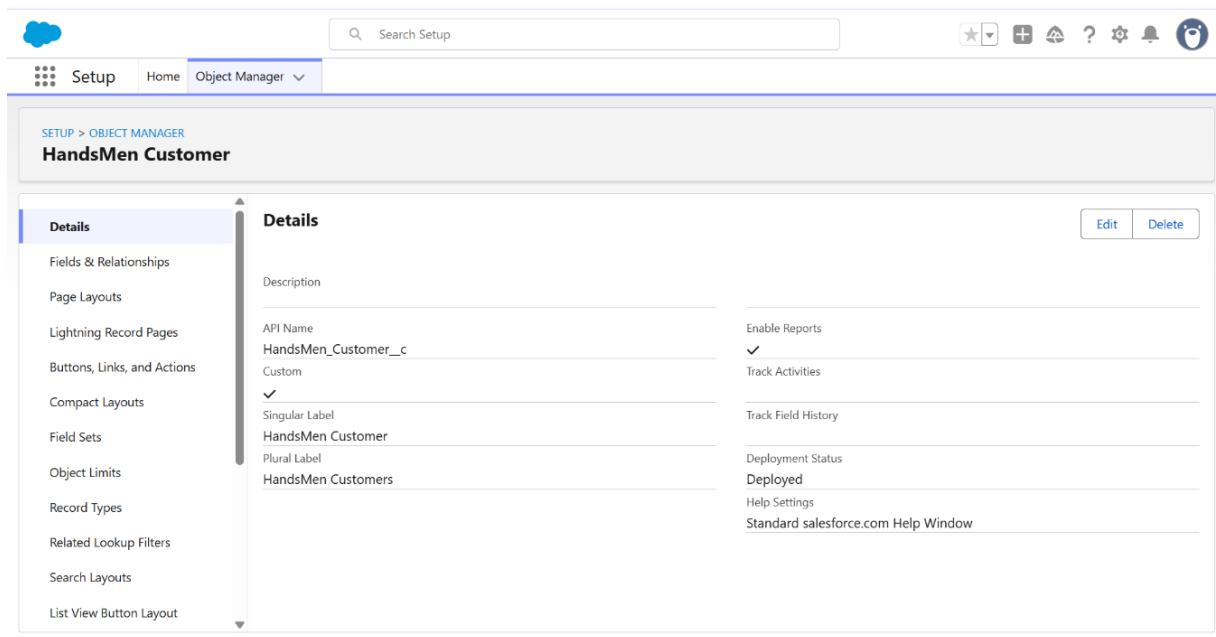

3. Creating the Lightning App

- A custom Lightning App named HandsMen Threads was created.

- The app includes the following tabs: HandsMen Customer, Order, Product, Inventory, Campaign, Reports, and other essential objects.
- The app was assigned to the System Administrator profile.

4. Validation Rules

To ensure accurate data entry and enforce business logic, the following validation rules were implemented:

- Order Object: Prevents saving the record if Total_Amount__c <= 0.

  Error Message: "Please enter a correct amount."

- Customer Object: Validates that the email address contains "@gmail.com"
  Error Message: "Please enter a Correct Gmail."
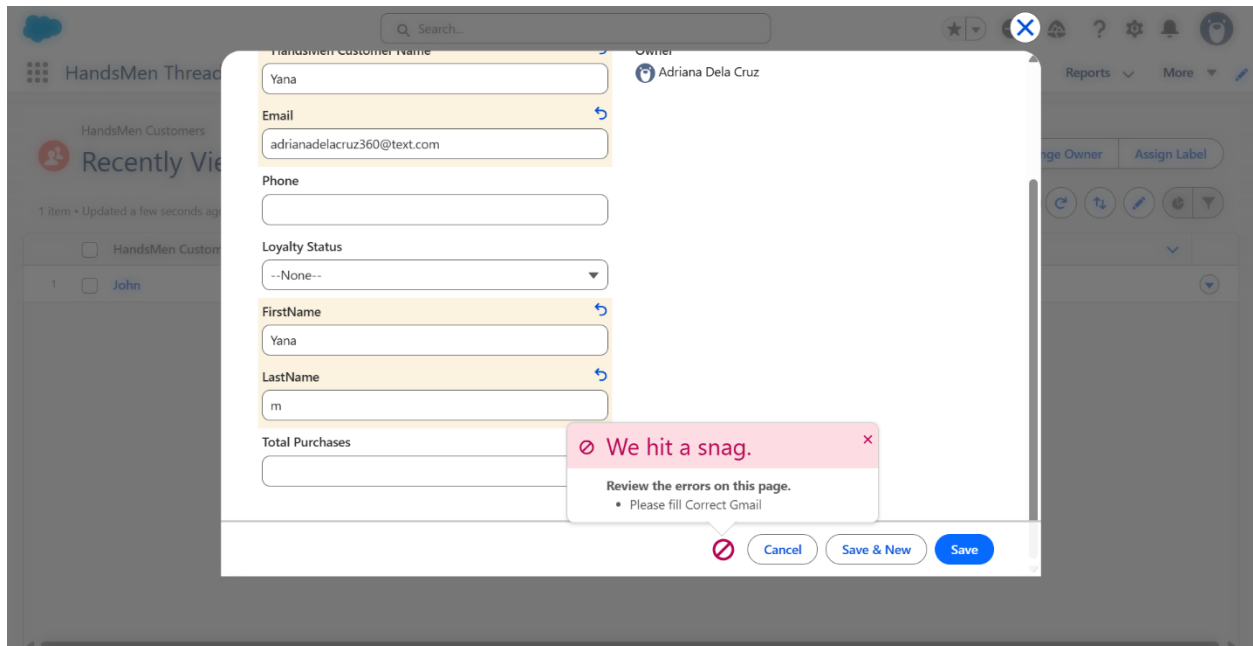
5. User Role and Profile Setup

Cloned the Standard User profile to create a new custom profile named Platform 1, then granted access to all required custom objects. Created roles for different departments, including:

- Sales Manager
- Inventory Manager

- Marketing Team

6. User Creation

Users were created in Salesforce and assigned the appropriate roles and profiles based on their job responsibilities:

- Niklaus Mikaelson – Assigned to the Sales role
- Kol Mikaelson – Assigned to the Inventory role

These role-based assignments ensure proper data visibility, security, and process control within the Salesforce system.


7. Email Templates and Alerts

Three custom email templates were created to support automated communication within the system:

- Order Confirmation – Triggered when an order reaches the Confirmed status.
- Low Stock Alert – Triggered when inventory levels drop below 5 units.
- Loyalty Program Update – Triggered when a customer's loyalty status is updated.

Corresponding Email Alerts were configured using these templates and integrated into the automation flows to ensure timely notifications.
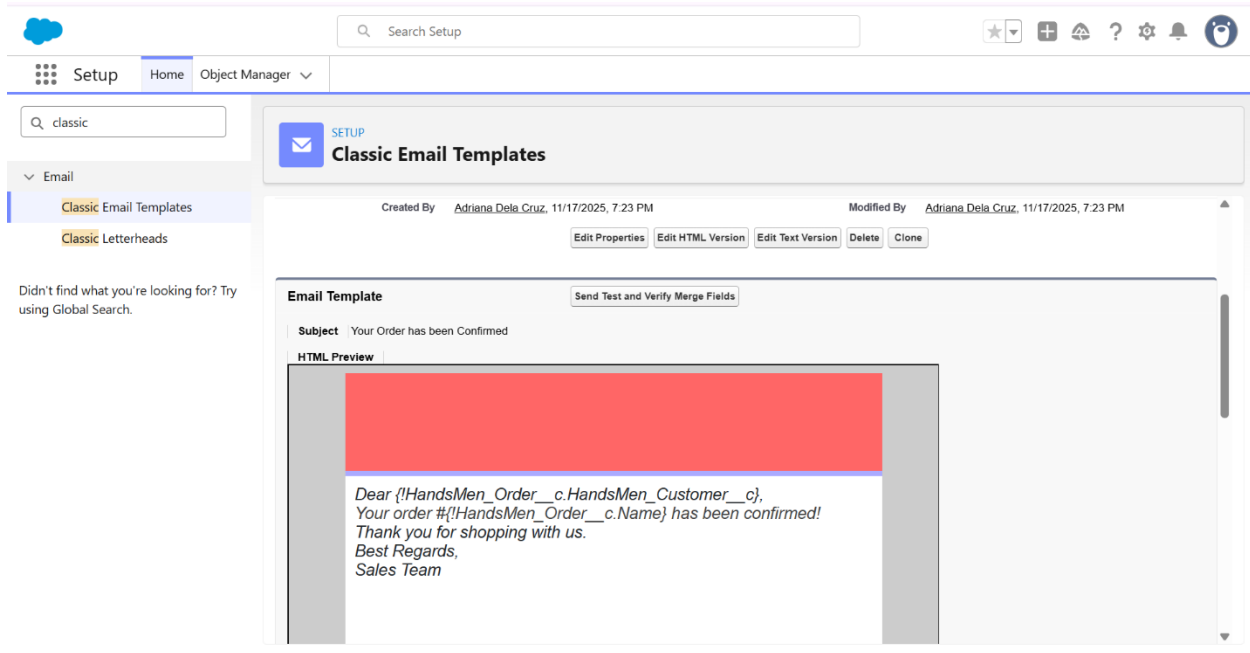
## 8. Flow Implementations

a. Order Confirmation Flow

- The flow is triggered when an order status is updated to Confirmed.
- It automatically sends an Order Confirmation Email to the associated customer using the predefined email alert.
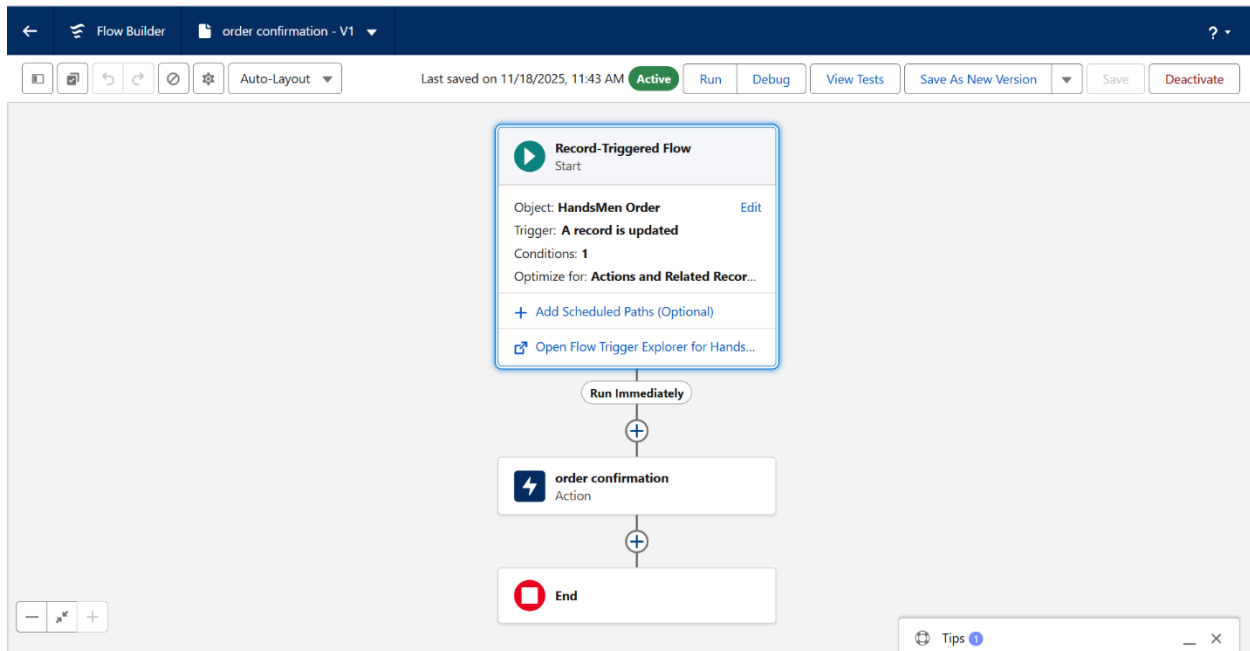
b. Stock Alert Flow

- The flow is triggered when an inventory record's stock quantity falls below 5 units.
- It automatically sends a Low Stock Alert Email to the Inventory Manager using the configured email alert.
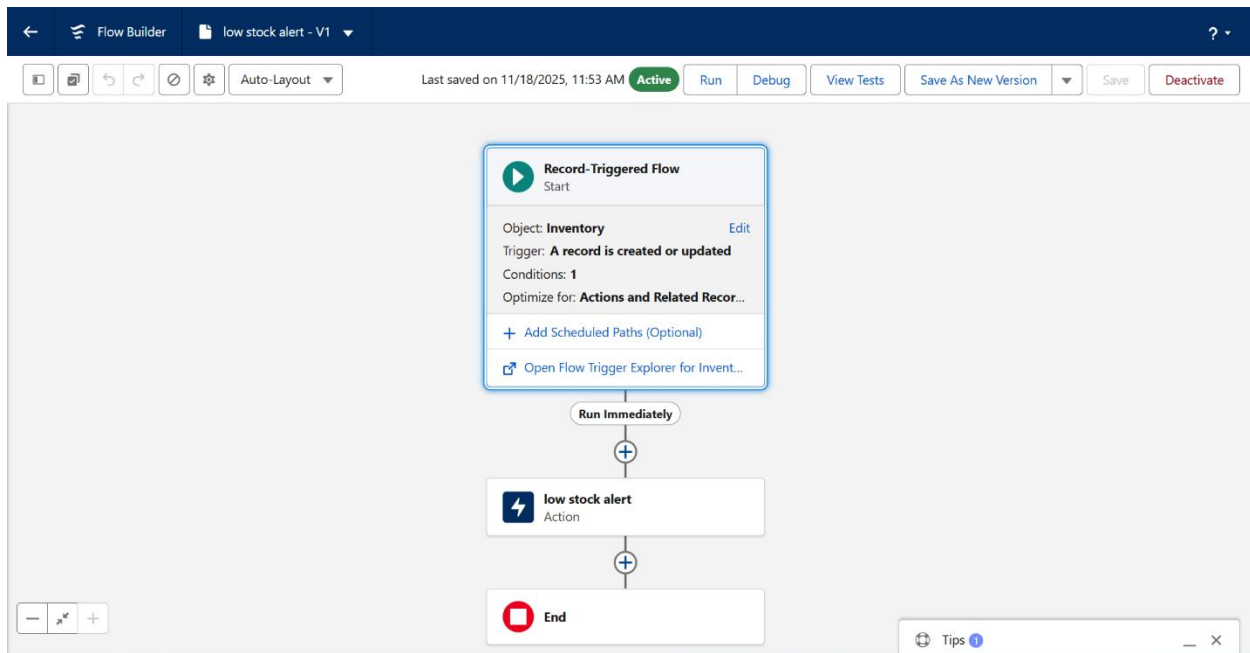
c. Scheduled Flow: Loyalty Update

- Runs daily at midnight

- Iterates through all customer records and automatically updates their Loyalty
  Status based on each customer's total purchase amount.
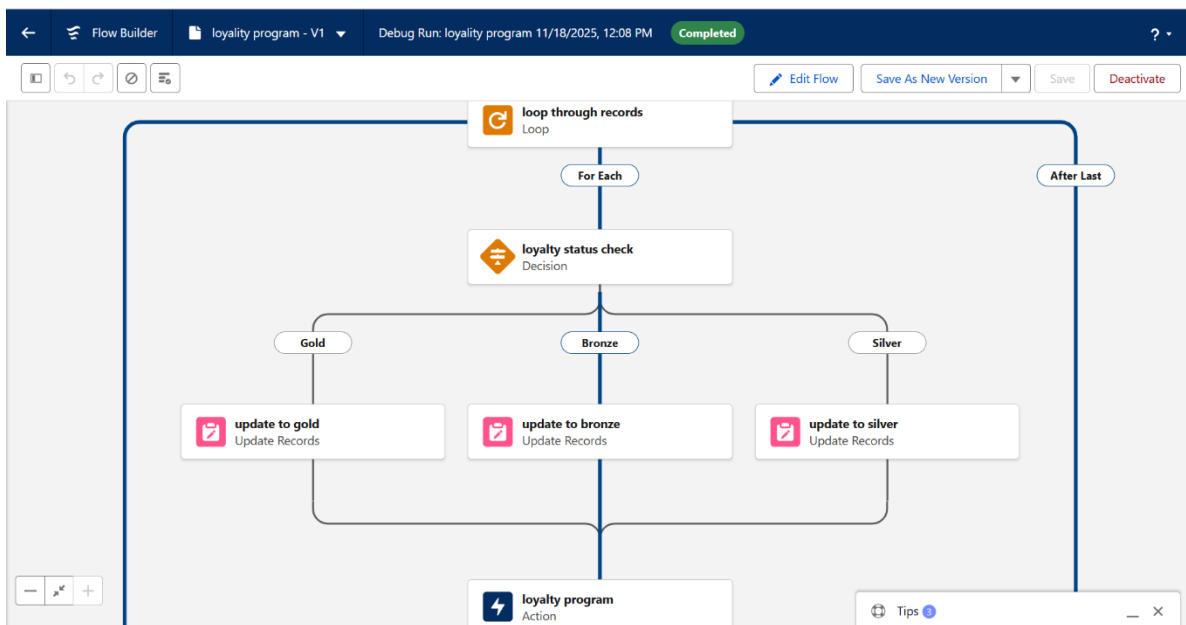
9. Apex Triggers

- **Order Total Trigger** – Automatically calculates the Total Amount based on the
  order quantity and unit price.
- **Stock Deduction Trigger** – Automatically deducts inventory stock levels
  whenever an order is placed and confirmed.
- **Loyalty Status Trigger** – Updates the customer's Loyalty Status based on their
  accumulated total purchases.

PROJECT EXPLANATION WITH REAL-WORLD EXAMPLE

1. Customer Registration

- A customer, Yana M, visits the store or website.

- A corresponding Customer record is created in Salesforce, capturing essential details such as her name, mobile number, and email address.
- A Validation Rule ensures data accuracy by verifying that the email provided follows the correct format (e.g., must contain "@gmail.com").

2. Product Setup

- The admin adds products like Shorts, T-shirts, etc., into the Product__c object.
- Each product entry has a price, SKU and other details.
- Inventory is also updated to store stock levels for each products, allowing real-time monitoring of item availability.

3. Order Placement

- Yana decides to purchase 20 shorts, each price at $5.
- A new Order record is created in Salesforce that captures the details of her purchase.
- An Apex Trigger automatically calculates the total amount, ensuring consistent and error-free computation.

4. Inventory Update

Once the order is submitted:

- Apex trigger on Inventory: Reduces shorts by 20.
- Validation Rule: Ensures stock never goes below 0.

5. Loyalty Program

- Yana currently has a total purchase amount of ₱500.
- A trigger on the Customer object evaluates each customer's total purchase value.
  Loyalty Status Criteria:
  - Below ₱500 → Bronze

- ₱500–₱1000 → Silver
- Above ₱1000 → Gold

Based on these criteria, Yana qualifies as a Bronze member.

6. Email Notifications

- When a new order is placed or when a customer's loyalty status is updated, a **Flow combined with an Email Alert** is triggered.
- Yana receives an email notification similar to:

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

7. User and Roles

Salesforce users representing store staff were created and assigned the appropriate roles and profiles:

- **Niklaus Mikaelson** – Sales Role (assigned with the Platform 1 Profile)
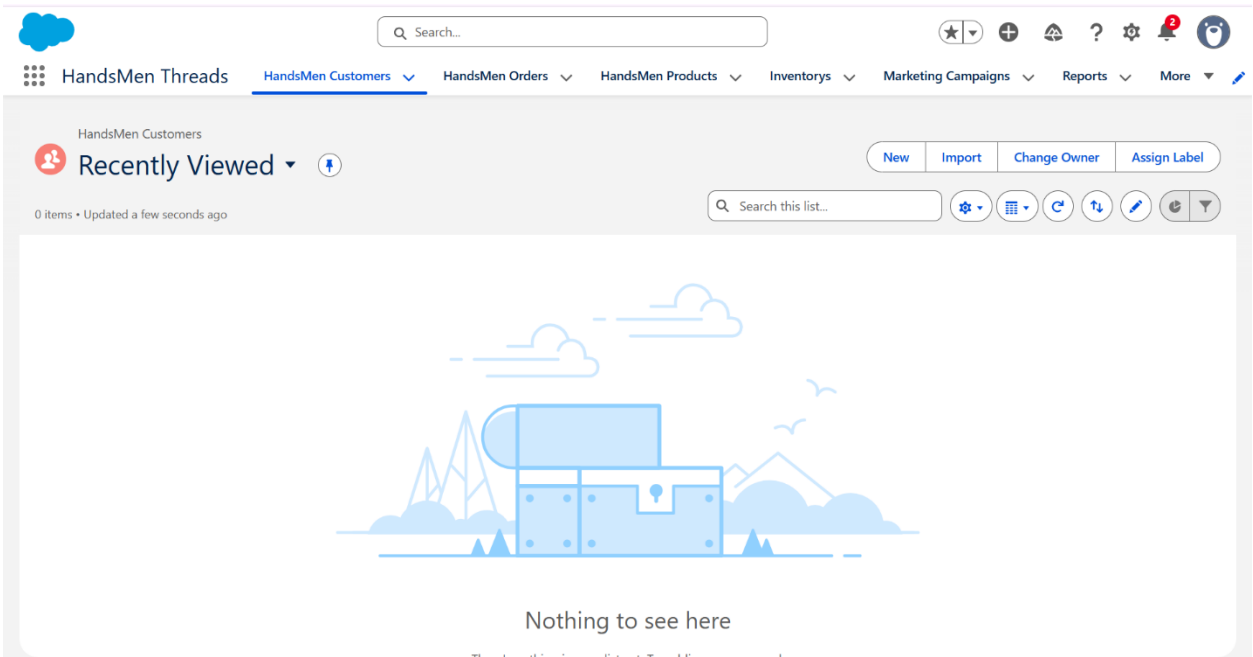- **Kol Mikaelson** – Inventory Role (assigned with the Platform 1 Profile)

SCREENSHOTS

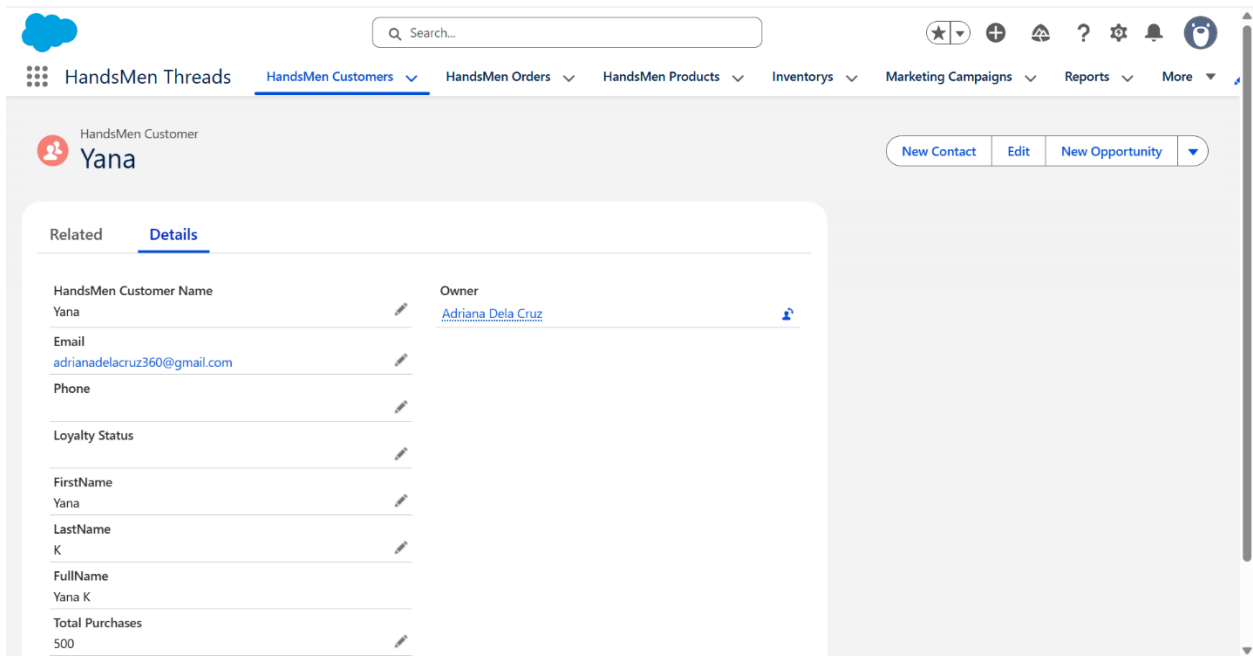**Fig: Custom App for HandsMen Threads**
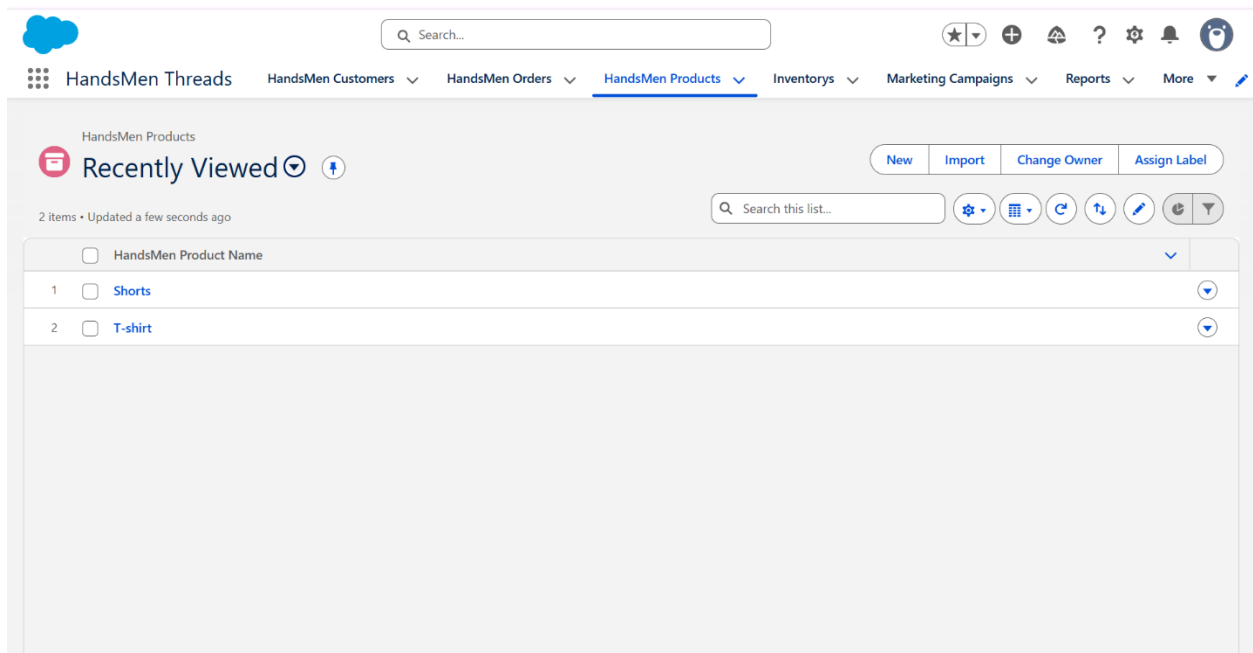

Fig: Customer Creation in HandsMen Threads
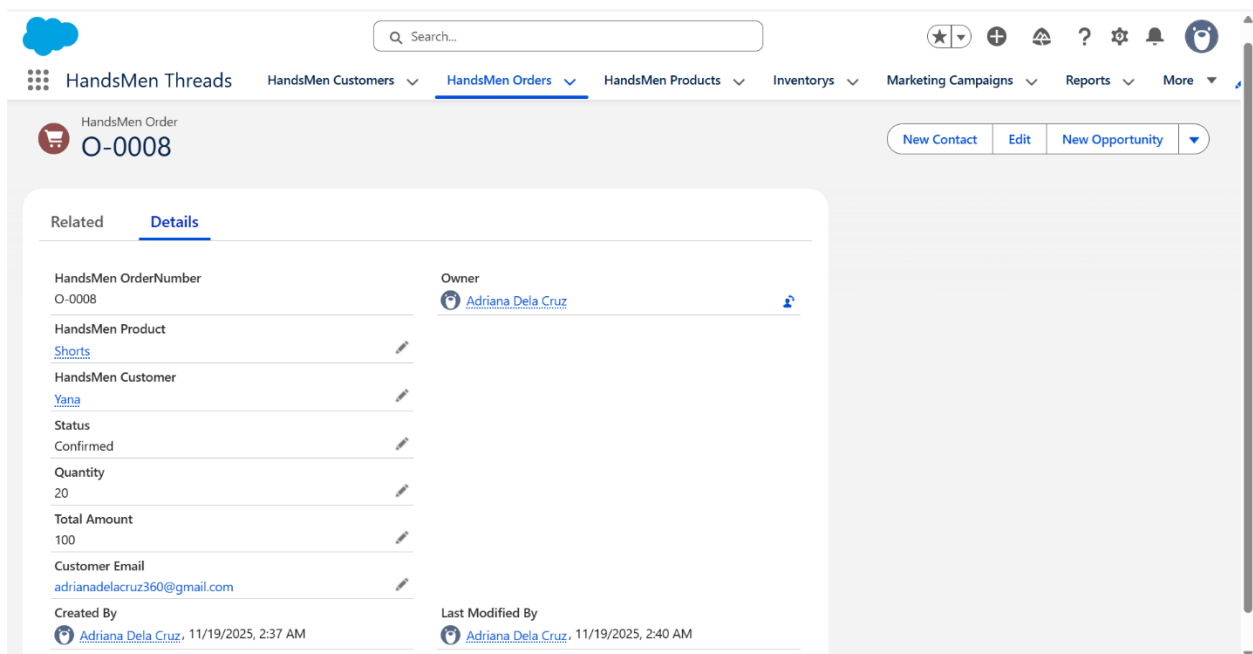
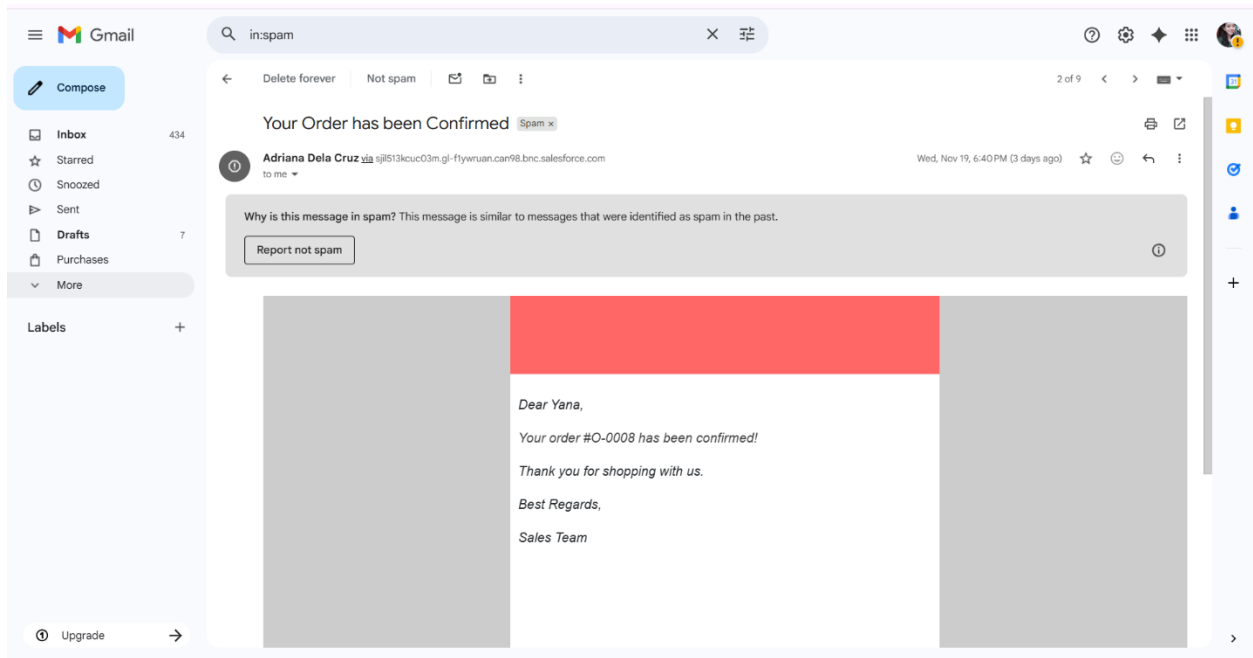**Fig: Products in HandsMen Threads**

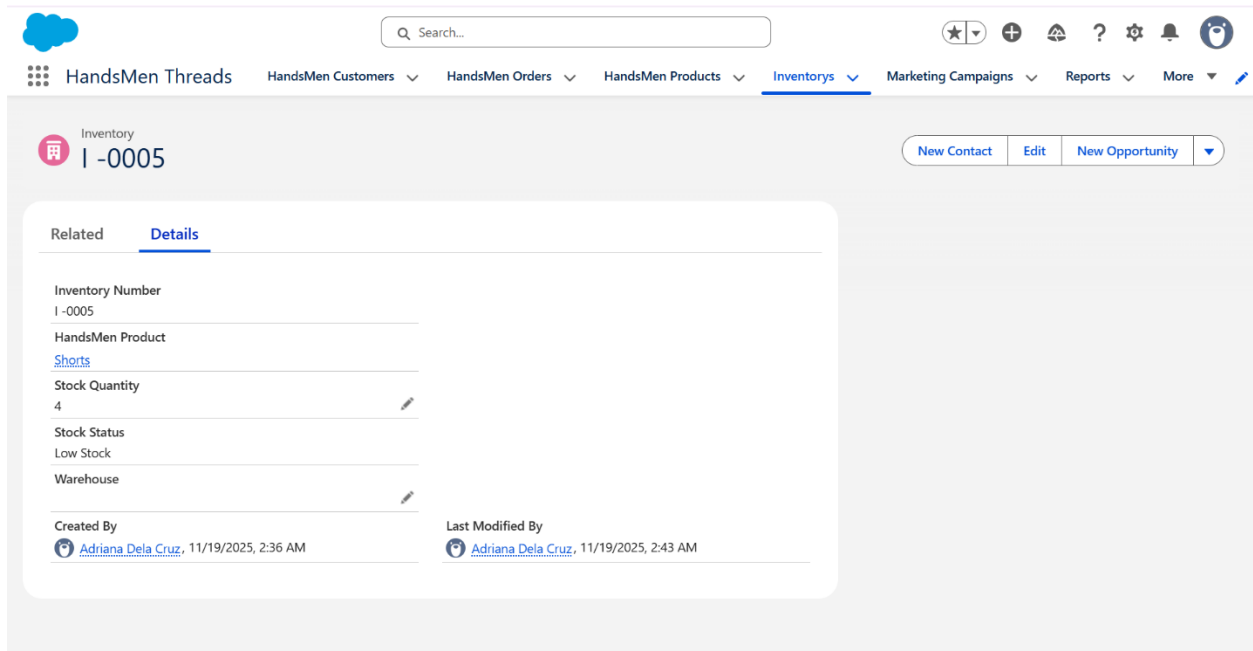**Fig: Order Confirmation**

Fig: Order Confirmation Email
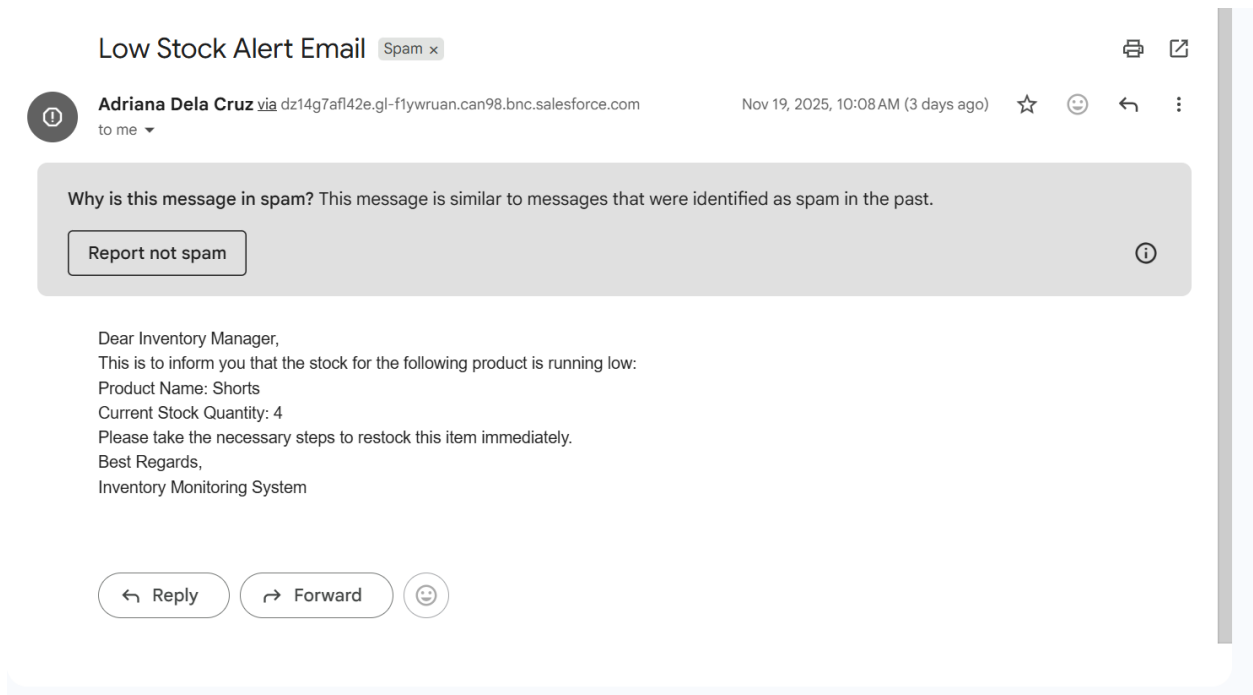

Fig: Inventory Creation
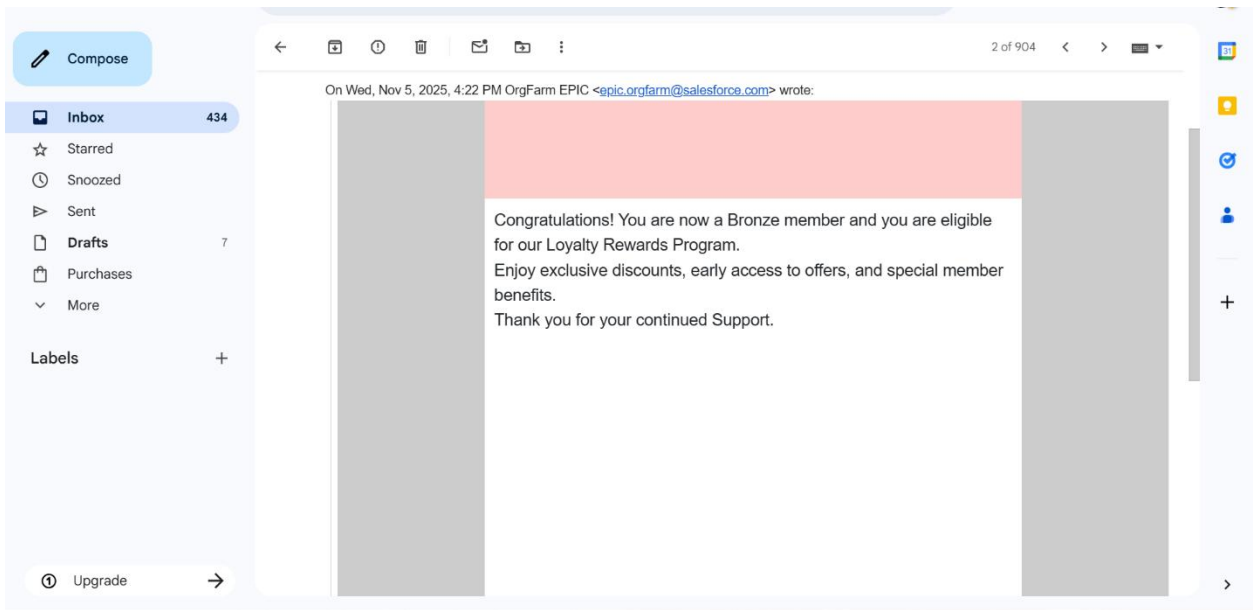
Fig: Low Stock Alert Email

Fig: Loyalty Program Email

CONCLUSION

The HandsMen Threads CRM system built on Salesforce successfully streamlines essential business processes such as customer management, product cataloging, order processing, inventory tracking, and loyalty program automation. By leveraging key Salesforce features including Custom Objects, Flows, Validation Rules, Email Alerts, and Apex the system ensures accurate data entry, real-time updates, and an enhanced customer experience. With automation and well-structured user roles, the platform minimizes the manual errors, accelerates business operations, and provides deeper insights into sales performance and stock levels.

Future Scope:

1. **Customer Portal Integration**

   - Develop a Customer Community Portal where customers can log in, view orders, and monitor their loyalty status.

2. **Mobile App using Salesforce Mobile SDK**

   - Enable store staff to manage inventory and process orders through a mobile-friendly application.

3. **Reports & Dashboards**

   - Create detailed sales and inventory dashboards to help management analyze trends and track performance in real time.

4. **AI-Powered Recommendations**

   - Leverage Salesforce Einstein to generate intelligent product recommendations and enhance personalization.

5. **Email Notification Integration**

   - Enable the system to automatically notify customers via email regarding important updates such as order confirmations and loyalty status changes.