

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

ABSTRACT

This project focuses on designing and implementing a customized Salesforce CRM for HandsMen Threads, a premium brand specializing in men's fashion and tailoring. The main goal is to organize essential business processes, enhance customer interaction, and keep data reliable and consistent across different departments.

To achieve this, a structured data model was developed using five custom objects—Customer, Order, Product, Inventory, and Marketing Campaign. Automation tools like Record-Triggered Flows, Scheduled Flows, Email Alerts, and Apex code were integrated into the system to streamline tasks such as order confirmation emails, loyalty program updates, and low-stock notifications.

Data accuracy was ensured through carefully built validation rules, while security and access control were strengthened using a role-based hierarchy. Apex batch processing was also implemented to automatically monitor and update products with low stock.

Overall, this CRM solution improves day-to-day operations, supports personalized customer engagement, and establishes a solid foundation for future expansion using the Salesforce Platform.

OBJECTIVE

The main aim of this project is to create a tailored Salesforce CRM system that supports the business workflow of HandsMen Threads. Specifically, it seeks to:

- Centralize customer, product, order, inventory, and marketing data.
- Automate repetitive processes like order confirmations, stock alerts, and loyalty updates.
- Ensure clean and consistent data using validation rules and controlled access.
- Provide real-time visibility of inventory levels and customer activity.
- Strengthen internal coordination through clearly assigned roles and permissions.
- Improve customer experience through targeted communication and loyalty programs.

TECHNOLOGY DESCRIPTION

Salesforce

Salesforce is a cloud-based CRM platform used to manage customer data, automate operations, and streamline services across departments. It offers point-and-click customization as well as developer tools like Apex and Flows for more advanced setups.

Custom Objects

Custom Objects work like database tables and store business-specific data.

Examples:

- **Customer__c** – Stores customer information
- **Product__c** – Contains product details
- **Order__c** – Records customer orders
- **Inventory__c** – Tracks stock levels
- **Campaign__c** – Manages marketing activities

Tabs

Tabs provide easy access to these objects inside the Salesforce interface.

Custom App

A custom app groups related tabs and tools together for a business function—in this case, the HandsMen Threads CRM.

Profiles

Profiles determine what a user can view or edit.

Roles

Roles define the level of data visibility within the organization's hierarchy.

Permission Sets

Additional permissions granted to users without editing their profiles.

Validation Rules

These ensure correct and meaningful data entries.

Examples:

- Email must include '@gmail.com'
- Stock value cannot fall below zero

Email Templates

Pre-formatted email layouts used for notifications like:

- Order Confirmation
- Low Stock Warning
- Loyalty Status Update

Email Alerts

Automated emails triggered by Flows or processes.

Flows

Flows automate business logic without writing code.

Examples:

- Sending confirmation emails when an order is updated
- Notifying managers about low stock
- Updating loyalty status daily

Apex

Apex is Salesforce's programming language used for custom logic.

Examples:

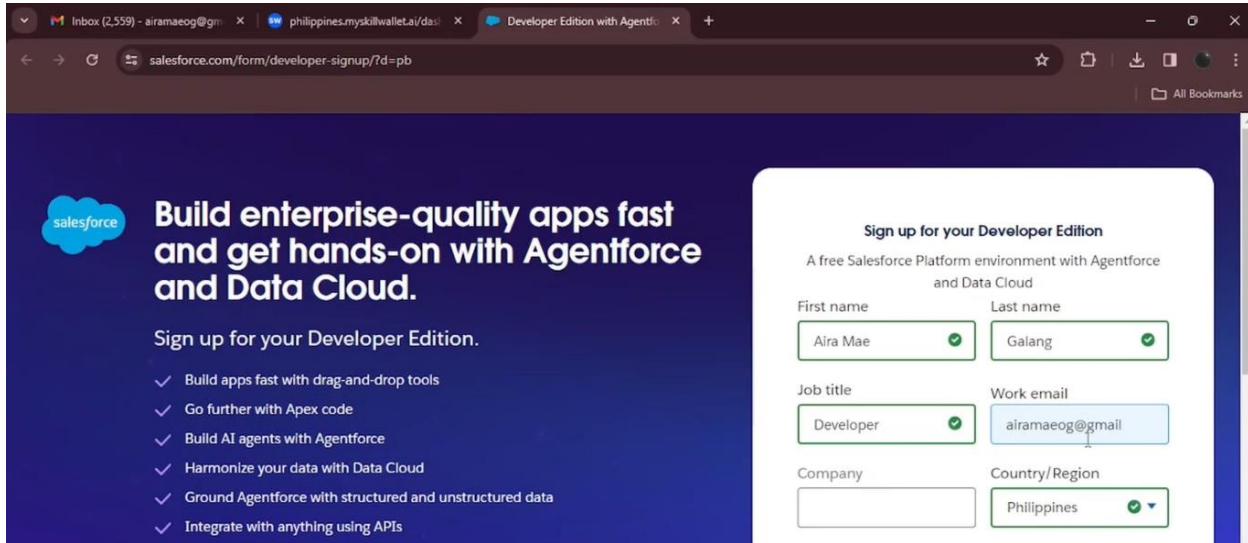
- Auto-calculating order totals
- Deducting stock when items are purchased
- Updating loyalty tiers

DETAILED EXECUTION OF PROJECT PHASES

1. Developer Org Setup

A Salesforce Developer Org was created using the official signup page.

Basic setup steps included verifying the account, creating a password, and navigating to the Setup page.



2. Creating Custom Objects

Five custom objects were created to store the most important business data:

- **Customer** – email, phone, and loyalty status
- **Product** – price, SKU, and product details
- **Order** – quantity, total, status
- **Inventory** – available stock and warehouse information
- **Marketing Campaign** – promos and schedules

Steps used:

1. Setup → Object Manager → New Custom Object
2. Assigned labels and API names
3. Enabled search and reporting
4. Created tabs for each object

The screenshot shows the Salesforce Object Manager interface. At the top, there's a search bar with the placeholder "Search Setup". To the right of the search bar are several icons: a star, a plus sign, a cloud, a question mark, a gear, a bell, and a user profile. Below the search bar, the navigation bar includes "Setup", "Home", and "Object Manager". The main area is titled "Object Manager" with a blue icon. It displays a table with three rows of data:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
HandsMen Customer	HandsMen_Customer_c	Custom Object		11/27/2025	✓
HandsMen Order	HandsMen_Order_c	Custom Object		11/27/2025	✓
HandsMen Product	HandsMen_Product_c	Custom Object		11/27/2025	✓

3. Creating the Lightning App

A custom Lightning App named **HandsMen Threads** was built and assigned to the System Administrator profile.

Included tabs:

- Customer
- Order
- Product
- Inventory
- Campaign
- Reports

4. Validation Rules

To improve data accuracy:

- **Order Object:** Total Amount must be greater than 0
Error message: “Please enter a valid amount.”
- **Customer Object:** Email must contain @gmail.com
Error message: “Please provide a valid Gmail address.”

5. User Roles & Profiles

- A Standard User profile was cloned and customized into **Platform 1 Profile**.
- Three roles were created:
 - Sales Manager

- Inventory Manager
- Marketing Team

These roles define what data each user can access.

6. User Creation

Users were added with their respective roles:

- **Niklaus Mikaelson** – Sales Team
- **Kol Mikaelson** – Inventory Team
- **Daniel Mikaelson** – Marketing Team

This ensures proper separation of responsibilities and data access.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter_Expert	Chatter	chatty.00dgj00000fta7luaf.nynkrxxhwv2n@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	EPIC_OrgFarm	OEPIG	epic.172eaffb3c2c@orgfarm.salesforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Galang_Aira_Mae	air	airamaeoq178@agentforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Mikaelson_Daniel	dmika	airamaeoq678@gmail.com	Marketing	<input checked="" type="checkbox"/>	Platform 1
<input type="checkbox"/>	Mikaelson_Kol	kmika	airamaeoq456@gmail.com		<input type="checkbox"/>	Platform 1
<input type="checkbox"/>	Mikaelson_Niklaus	nmika	airamaeoq123@gmail.com	Sales	<input checked="" type="checkbox"/>	Platform 1
<input type="checkbox"/>	User_Integration	integ	integration@00dgj00000fta7luaf.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User_Security	sec	insightssecurity@00dgj00000fta7luaf.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

7. Email Template & Alerts

Three email templates were created:

1. **Order Confirmation**
2. **Low Stock Alert**
3. **Loyalty Status Update**

Email Alerts were then set up and connected to Flows to send notifications automatically.

Search Setup

Setup Home Object Manager

email te

SETUP Classic Email Templates

Email Template

Subject: Loyalty Program Email

HTML Preview:

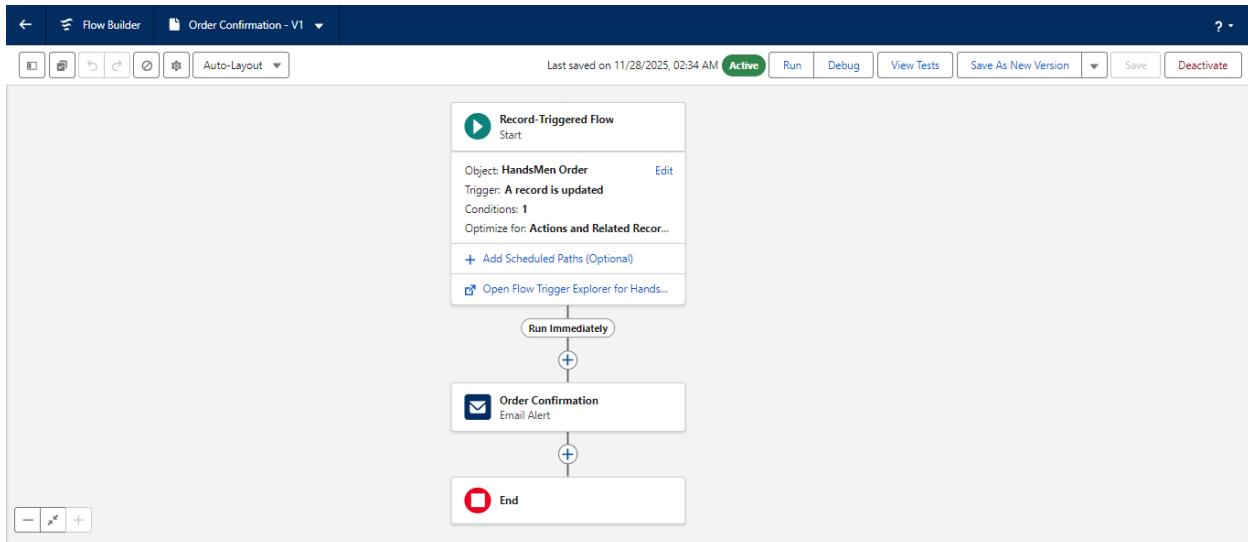
Congratulations! You are now a {HandsMen_Customer__c.Loyalty_Status__c} member and you are eligible for our Loyalty Rewards Program. Enjoy exclusive discounts, early access to offers, and special member benefits. Thank you for your continued Support.

8. Flow Implementations

a. Order Confirmation Flow

Triggered when an order's status becomes “Confirmed.”

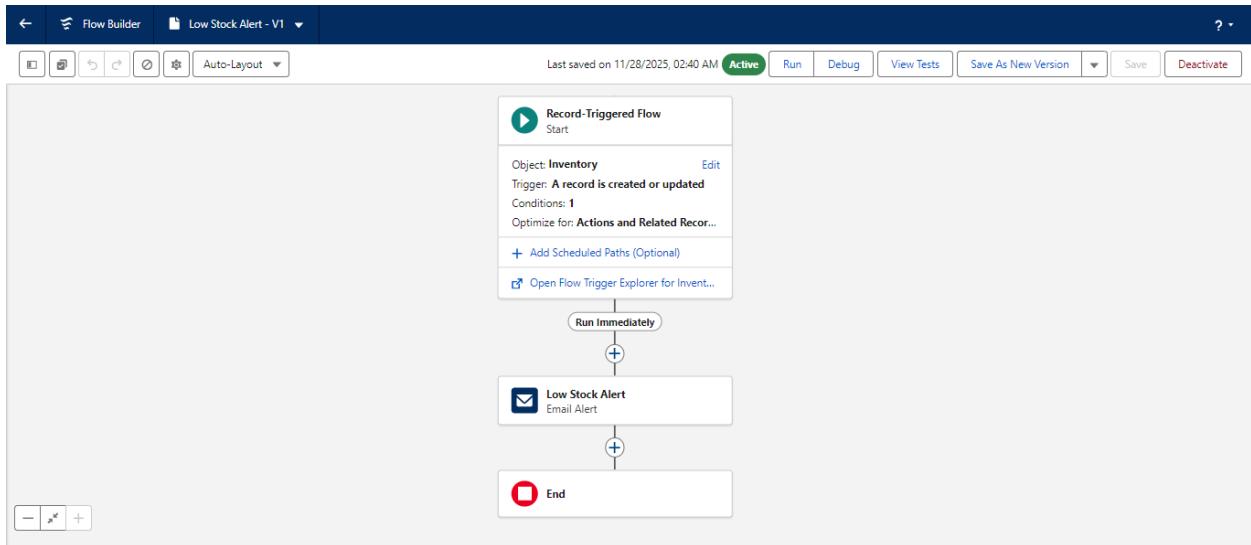
Automatically emails the customer.



b. Stock Alert Flow

Monitors inventory levels.

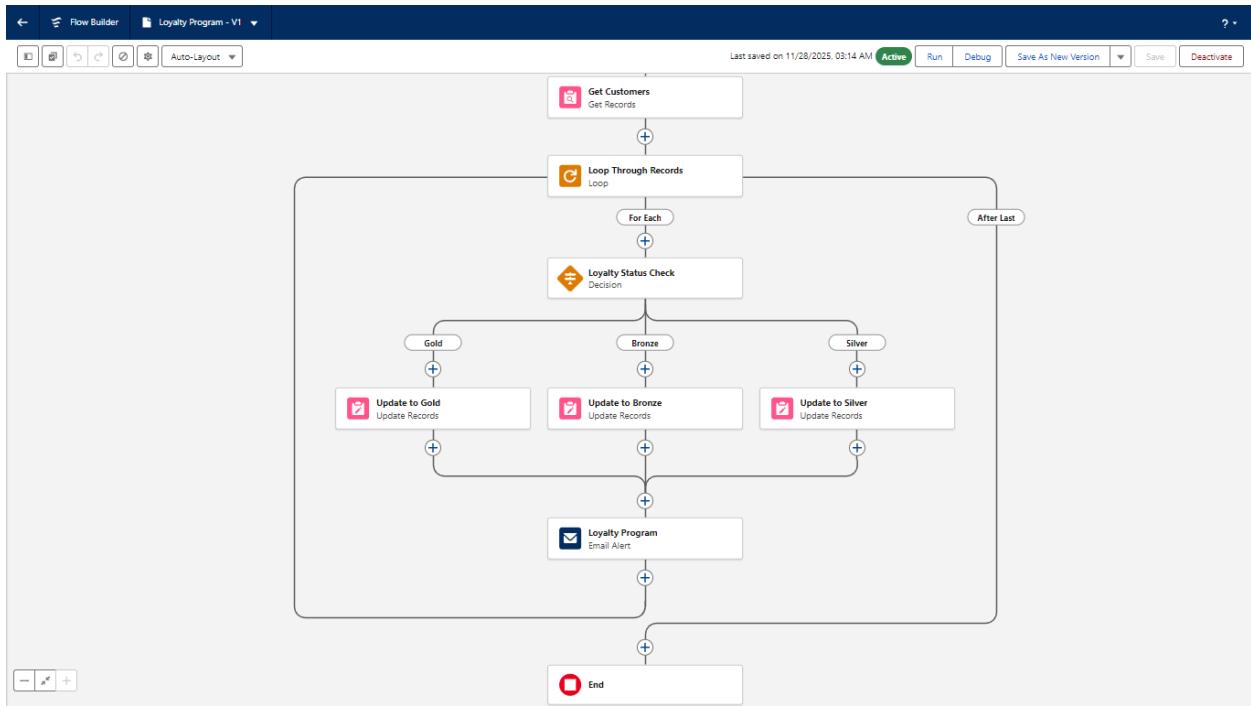
Sends an alert to the Inventory Manager if stock < 5.



c. Scheduled Loyalty Update Flow

Runs every night at 12 AM.

Reviews customer purchases and updates their loyalty level.



9. Apex Triggers

Custom automation using Apex:

- **Order Total Trigger**
Automatically multiplies quantity by price.
- **Inventory Trigger**
Deducts stock when an order is placed.
- **Loyalty Status Trigger**
Updates membership level based on lifetime purchases.

REAL-WORLD PROJECT WALKTHROUGH

1. Customer Registration

Elijah Mikaelson signs up or purchases in-store.
A Customer record is created.
Validation makes sure the email format is correct.

2. Product Setup

Admin adds clothing items like shirts, suits, etc.
Inventory is updated accordingly.

3. Order Placement

Elijah buys 2 shirts priced at ₦2500 each.
Salesforce creates an Order record.
Apex calculates the total automatically.

4. Inventory Update

Stock is reduced by 2 units.
Validation rules prevent negative stock.

5. Loyalty Program

Elijah's total purchase amount is checked.
His membership level is adjusted (e.g., Bronze, Silver, Gold).

6. Email Notifications

He receives emails confirming:

- His order
- His loyalty upgrade

7. User Roles

Salesforce users like Niklaus and Kol handle Sales and Inventory.

SCREENSHOTS

The screenshot shows the HandsMen Threads application interface. At the top, there is a navigation bar with links for HandsMen Threads, HandsMen Customer, HandsMen Order, HandsMen Products, Inventory, Marketing Campaigns, Reports, and More. A search bar is located at the top center. Below the navigation bar, a sidebar titled "Recently Viewed" lists two items: "Aira" and "John". To the right of the sidebar, there is a main content area with a search bar labeled "Search this list...", a toolbar with various icons, and a list of items. The items are listed with their names and a small icon.

Figure 1: Custom Application HandsMen Threads

The screenshot shows the HandsMen Threads application interface, specifically the "New HandsMen Customer" form. The form has sections for "Information", "Owner", "Phone", "Loyalty Status", "FirstName", "LastName", and "Total Purchases". The "Information" section contains fields for "HandsMen Customer Name" (with a note "Complete this field."), "Email", and "Phone". The "Owner" section shows "Aira Mae Galang" as the owner. The "Loyalty Status" dropdown is set to "-None--". The "FirstName" and "LastName" fields are empty. The "Total Purchases" field is also empty. At the bottom of the form, there are buttons for "Cancel", "Save & New", and "Save".

Figure 2: Customer Creation in HandsMen Threads

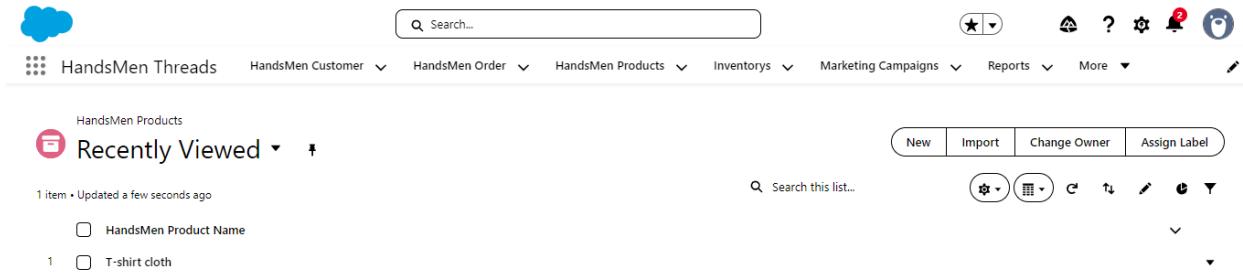


Figure 3: Products in HandsMen Threads

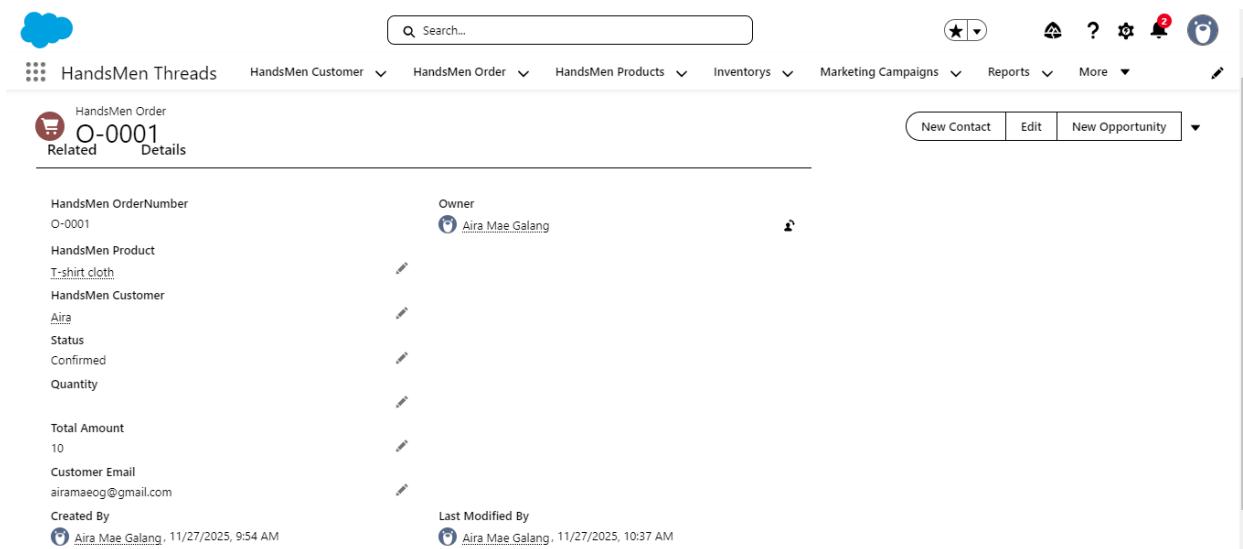


Figure 4: Order Confirmation in HandsMen Threads



Dear Aira,
Your order #O-0001 has been confirmed!
Thank you for shopping with us.
Best Regards,
Sales Team



Figure 5: Confirmation Email

The screenshot shows the HandsMen Threads software interface. At the top, there is a navigation bar with a cloud icon, the company name "HandsMen Threads", and various dropdown menus like "HandsMen Customer", "HandsMen Order", "HandsMen Products", "Inventory", "Marketing Campaigns", "Reports", and "More". A search bar is also present. On the left, there is a sidebar with a blue circular icon and the text "Inventory I -0001". The main content area displays a table with the following data:

Related	Details
Inventory Number	I -0001
HandsMen Product	T-shirt cloth
Stock Quantity	600
Stock Status	Available
Warehouse	
Created By	Aira Mae Galang, 11/27/2025, 9:52 AM
Last Modified By	Aira Mae Galang, 11/27/2025, 11:47 AM

At the bottom right of the main area, there are buttons for "New Contact", "Edit", and "New Opportunity".

Figure 6: Inventory Creation

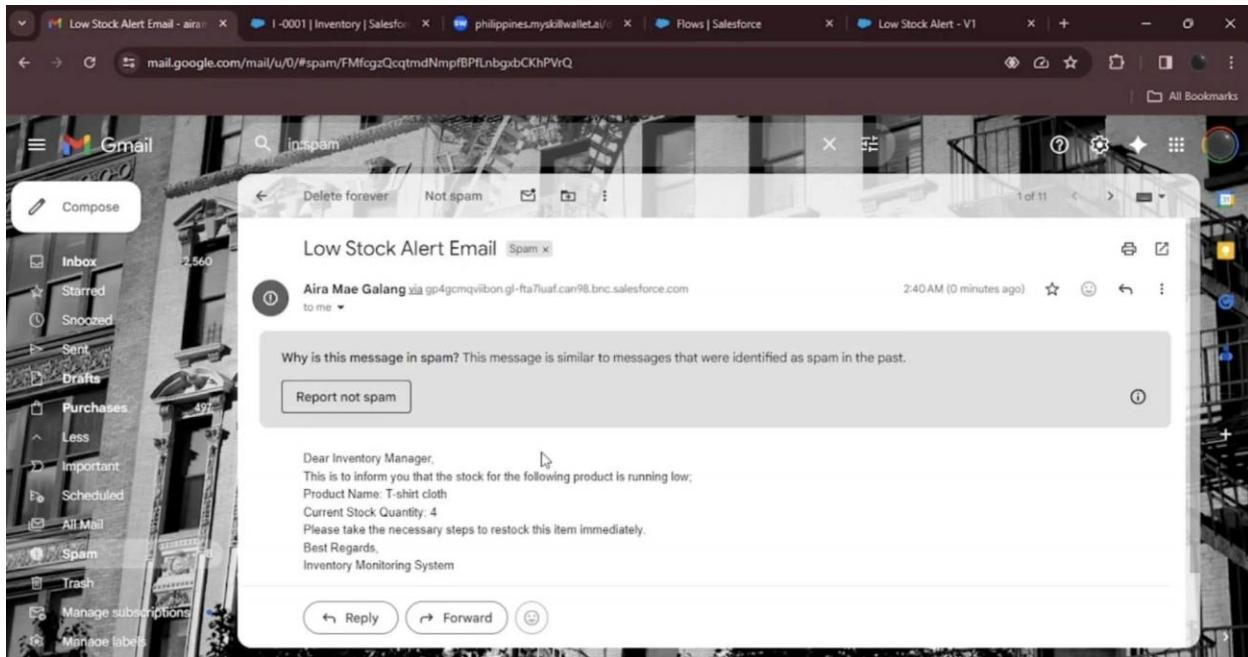


Figure 7: Low Stock Alert Email



Figure 8: Loyalty Program Email

CONCLUSION

The customized Salesforce CRM for HandsMen Threads successfully automates and simplifies the company's daily operations, from customer management to order processing and inventory control. With the use of Flows, Apex, Validation Rules, and custom objects, the system reduces manual work, prevents data inconsistencies, and allows the business to deliver more personalized service.

The project not only enhances operational efficiency but also prepares the company for future expansion due to the scalable nature of the Salesforce Platform.

FUTURE SCOPE

1. Customer Portal

A self-service portal where customers can track orders and view loyalty points.

2. Mobile App (Salesforce Mobile SDK)

Staff can update orders and inventory while on the go.

3. Reports & Dashboards

Visual insights for monitoring sales trends, inventory movement, and customer engagement.

4. AI-Powered Recommendations (Einstein)

Personalized product suggestions based on buyer behavior.

5. WhatsApp/SMS Integration

Automatic notifications for orders, promos, and loyalty updates.