

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.
- Delivers 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.

Example:

- Customer_c – Stores Customer Info
- Product_c – Stores Product details
- Order_c – Stores Order

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 permission to users without changing their profile.

Validation Rules:

Validation Rules ensure data entered meets business criteria.

Example:

- Email must contain @gmail.com
- Stock cannot be negative

Email Templates:

Predefined formats for sending emails to customers or users.

Example:

"Order Confirmation" 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.

Example:

Flow triggers email alerts on new order

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

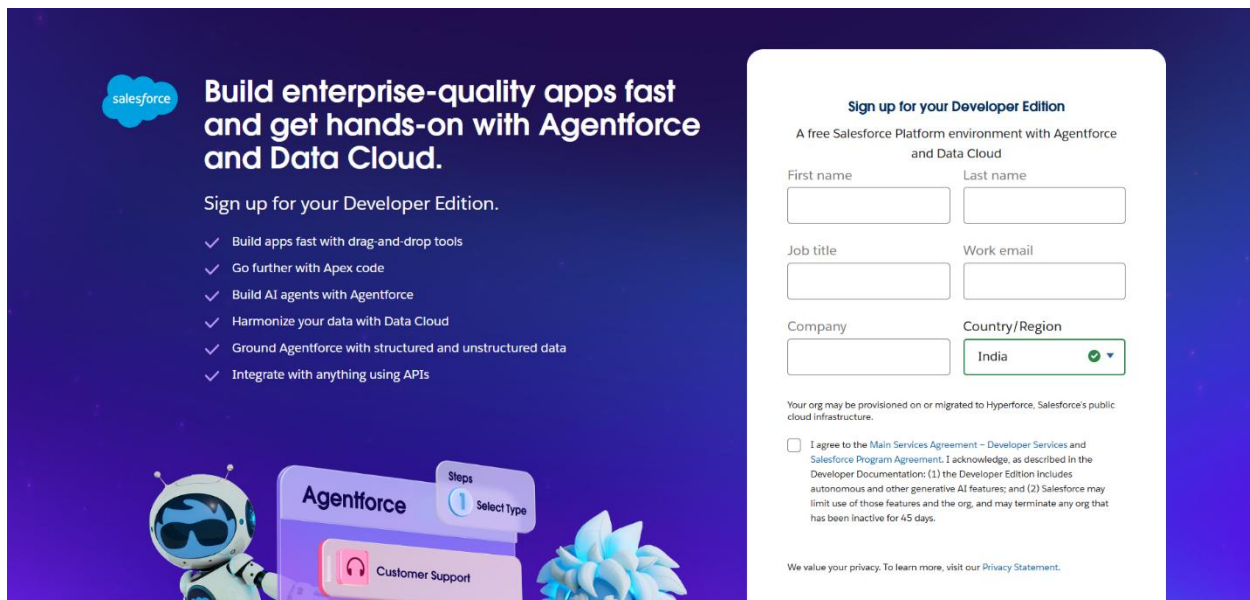
DETAILED EXECUTION OF PROJECT PHASE:

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.



The image shows the Salesforce Developer Edition sign-up page. On the left, there is a blue background with the Salesforce logo and the text "Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud." Below this, it says "Sign up for your Developer Edition." and lists six benefits: "Build apps fast with drag-and-drop tools", "Go further with Apex code", "Build AI agents with Agentforce", "Harmonize your data with Data Cloud", "Ground Agentforce with structured and unstructured data", and "Integrate with anything using APIs". At the bottom left, there is an illustration of a robot and a "Customer Support" button. On the right, there is a white sign-up form titled "Sign up for your Developer Edition" with the subtitle "A free Salesforce Platform environment with Agentforce and Data Cloud". The form includes fields for "First name", "Last name", "Job title", "Work email", "Company", and "Country/Region" (with "India" selected). Below the form, there is a checkbox for "I agree to the Main Services Agreement – Developer Services and Salesforce Program Agreement" and a link to the "Privacy Statement".

Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud.

Sign up for your Developer Edition.

- ✓ Build apps fast with drag-and-drop tools
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- ✓ Ground Agentforce with structured and unstructured data
- ✓ Integrate with anything using APIs

Sign up for your Developer Edition
A free Salesforce Platform environment with Agentforce and Data Cloud

First name Last name

Job title Work email

Company Country/Region

Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud infrastructure.

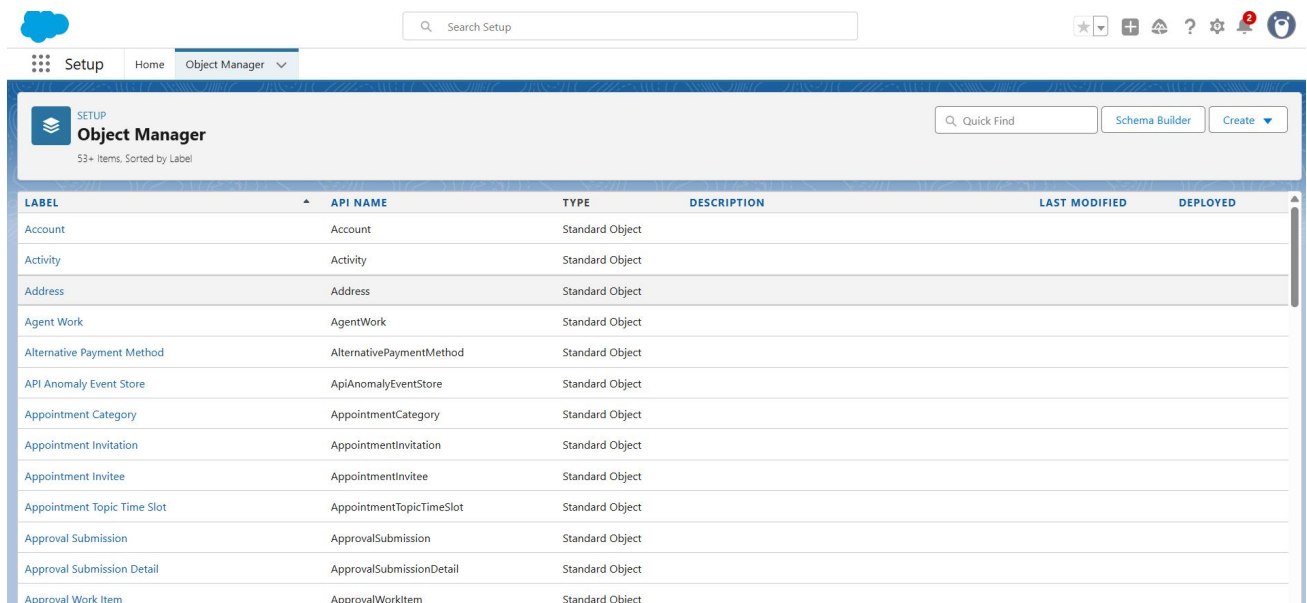
☐ I agree to the Main Services Agreement – Developer Services and Salesforce Program Agreement. I acknowledge, as described in the Developer Documentation: (1) the Developer Edition Includes autonomous and other generative AI features; and (2) Salesforce may limit use of those features and the org, and may terminate any org that has been inactive for 45 days.

We value your privacy. To learn more, visit our Privacy Statement.

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.



LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Account	Standard Object			
Activity	Activity	Standard Object			
Address	Address	Standard Object			
Agent Work	AgentWork	Standard Object			
Alternative Payment Method	AlternativePaymentMethod	Standard Object			
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object			
Appointment Category	AppointmentCategory	Standard Object			
Appointment Invitation	AppointmentInvitation	Standard Object			
Appointment Invitee	AppointmentInvitee	Standard Object			
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object			
Approval Submission	ApprovalSubmission	Standard Object			
Approval Submission Detail	ApprovalSubmissionDetail	Standard Object			
Approval Work Item	ApprovalWorkItem	Standard Object			

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: Hands Men 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_c0.

Error: "Please Enter Correct Amount"

Customer Object: Validates email contains @gmail.com.

Error: "Please fill Correct Gmail"

The screenshot shows the 'New HandsMen Customer' form in Salesforce. The form has a title bar 'New HandsMen Customer' and a legend '* = Required Information'. The form is divided into sections: 'Information' and 'Owner'. The 'Information' section contains the following fields:

- * HandsMen Customer Name (text input, value: karthik)
- Email (text input, value: karthik@xyz.com)
- Phone (text input, empty)
- Loyalty Status (dropdown menu, value: --None--)
- FirstName (text input, empty)
- LastName (text input, empty)
- Total Purchases (text input, empty)

The 'Owner' section shows a user profile for Devatha Akshay. A validation error message is displayed in a red box: 'We hit a snag. Review the errors on this page. Please fill Correct Gmail'. The error is linked to the Email field. At the bottom of the form, there are three buttons: 'Cancel', 'Save & New', and 'Save'.

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

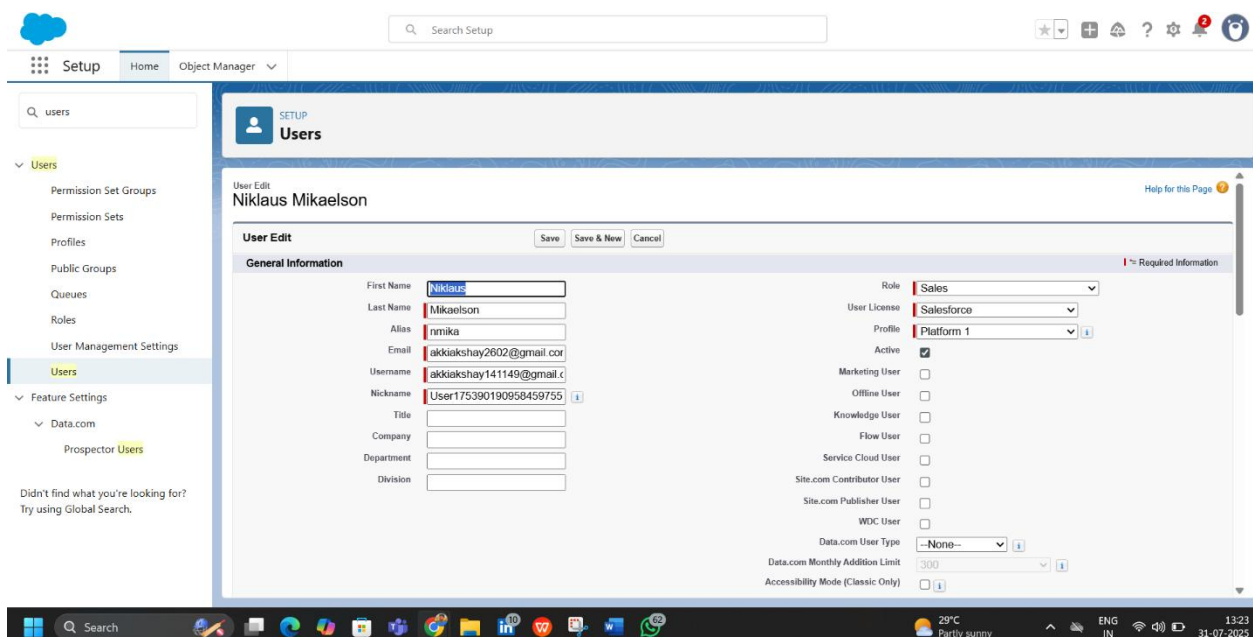
6. User Creation

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

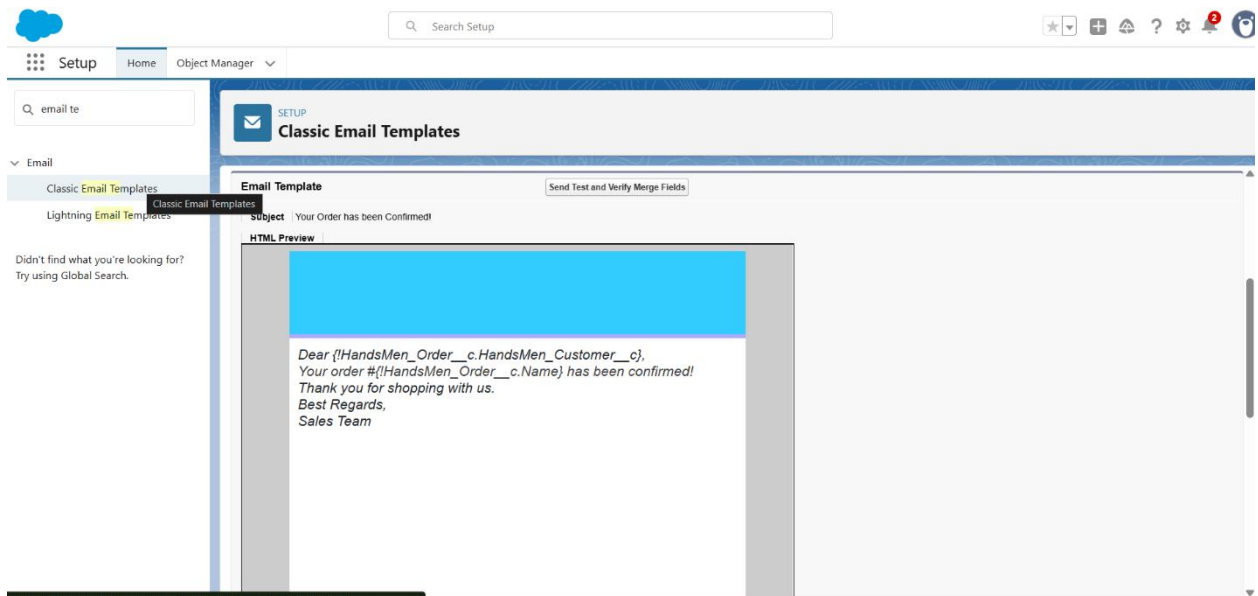


7. Email Template & Alerts.

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.

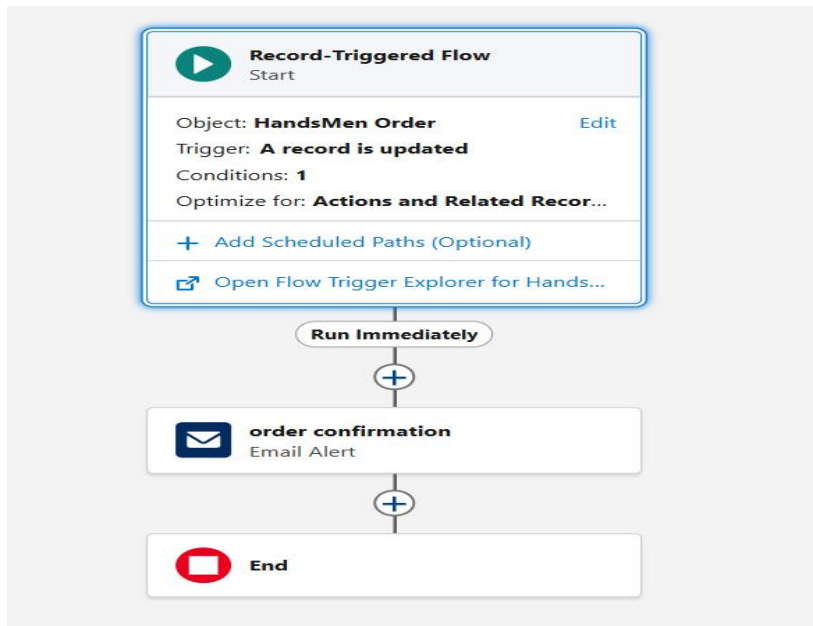


8. Flow Implementations:

a. Order Confirmation Flow

Triggered when an order is updated to Confirmed.

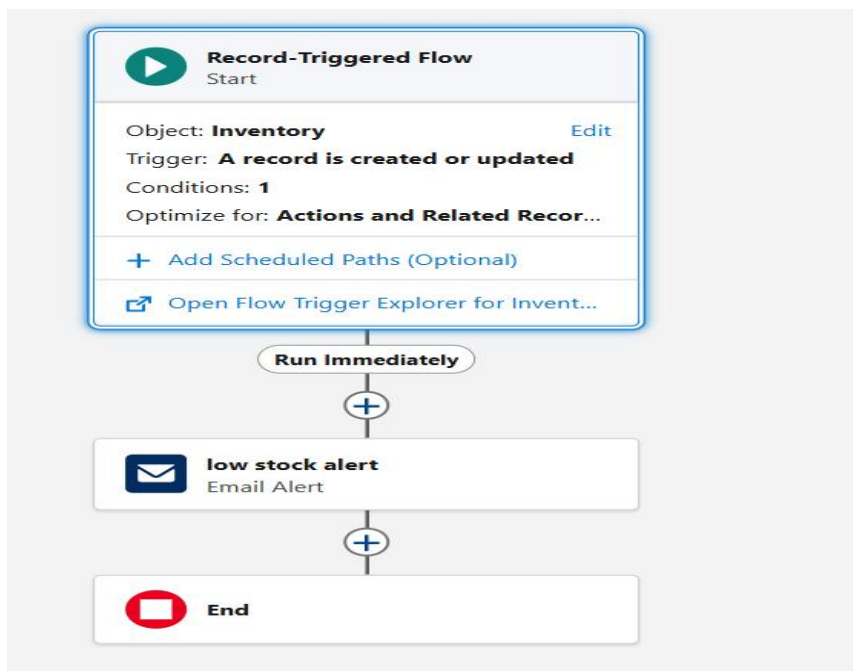
Sends an Order Confirmation email to the related customer.



b. Stock Alert Flow

Triggered when Inventory stock drops below 5.

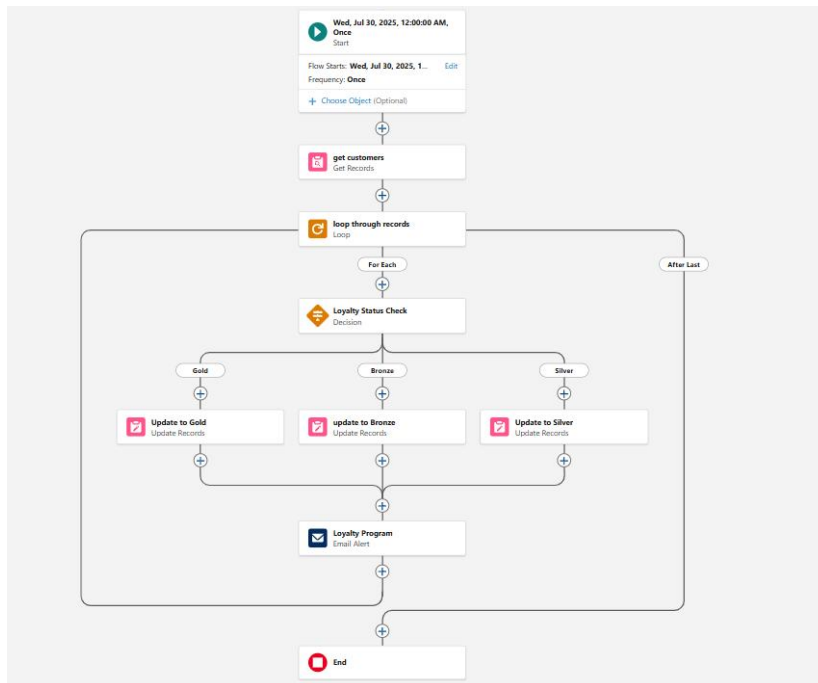
Sends Low Stock email to Inventory Manager.



c. Scheduled Flow: Loyalty Update

Runs daily at midnight.

Loops through customers and updates their Loyalty Status based on total purchases.



7. 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 EXAMPLE

Let's walk through it like a real customer interaction.

1. Customer Registration

- A customer, Elijah Mikaelson, visits the store or website.
- In Salesforce: A record is created in the Customer object with his name, phone, email, etc.
- Validation Rule: Ensures the email is valid (e.g., must contain @gmail.com).

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 2500). An order is placed.
- In Salesforce: A new Order record is created.
- Apex Trigger: Automatically calculates 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** -Sales Role (Platform 1 Profile)
- **Kol Mikaelson** - Inventory Role (Platform 1 Profile)

SCREENSHOTS:


New HandsMen Product

* = Required Information

Information

* HandsMen Product Name

Owner

 Devatha Akshay

SKU

Price

Stock Quantity

Cancel

Save & New

Save

Fig:Handsmen Product

Inventory

I -0002

Related

Details

Inventory Number

I -0002

HandsMen Product

[Watch](#)

Stock Quantity

4


Stock Status

Low Stock

Warehouse

hyderabad

Created By

 Devatha Akshay, 7/31/2025, 12:02 AM

Last Modified By


 Devatha Akshay, 7/31/2025, 12:04 AM

Fig:Inventory details

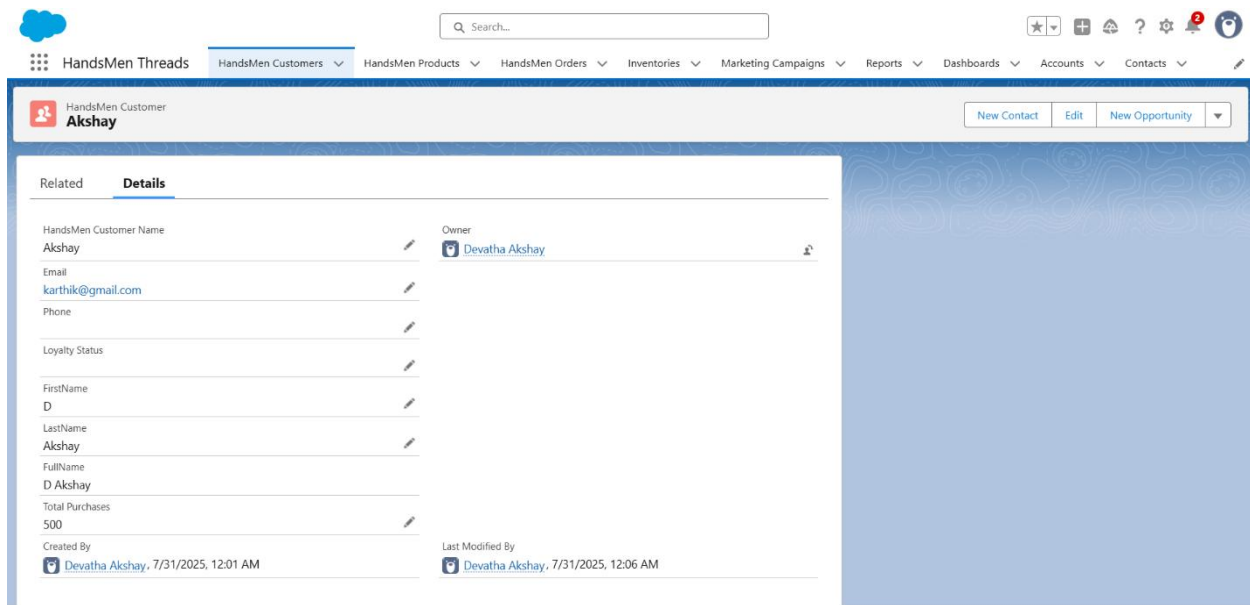


Fig:HandMen Customers Details

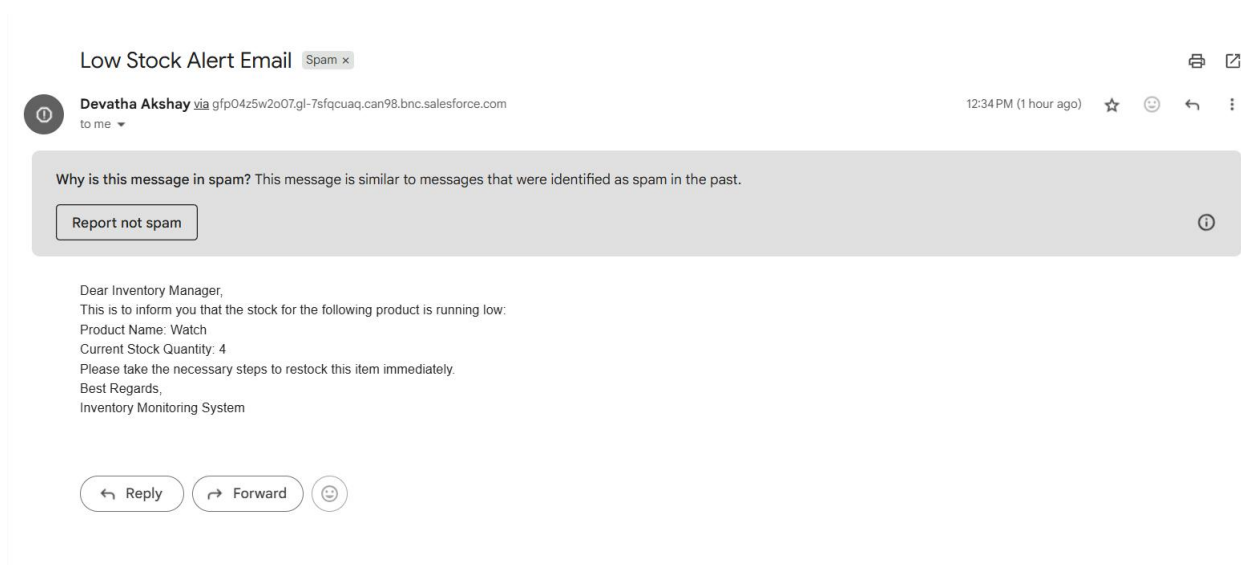


Fig:Email about Low Stock Alert

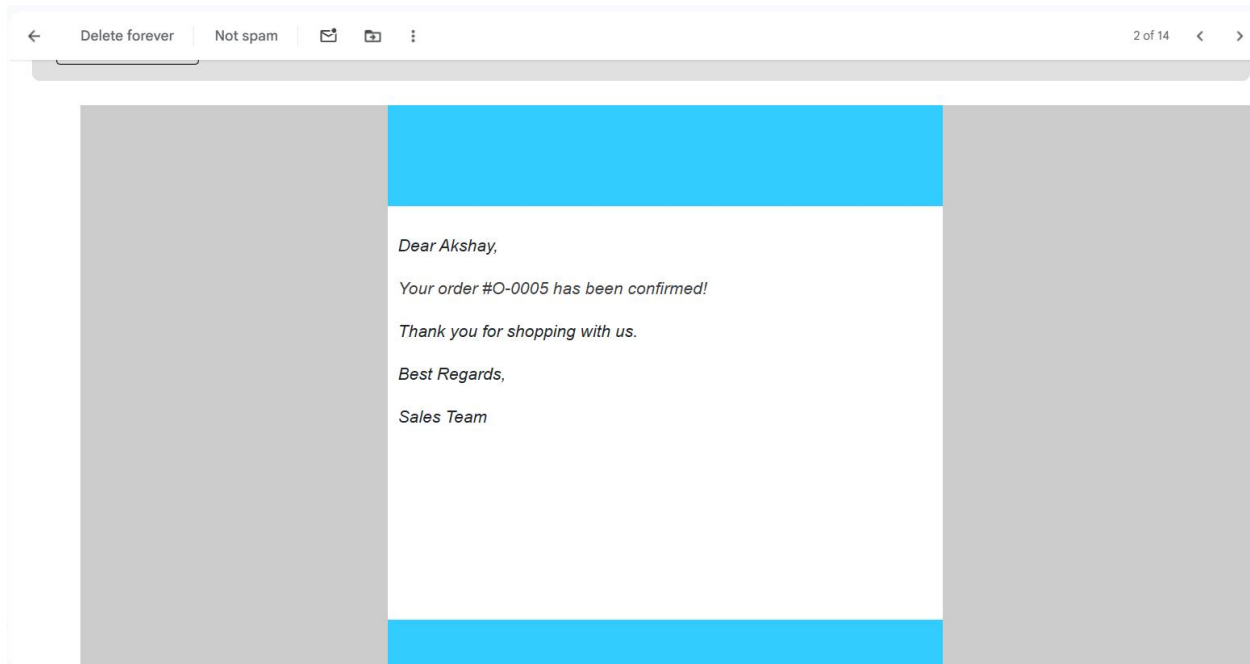


Fig:Email Template of Order Confirmation

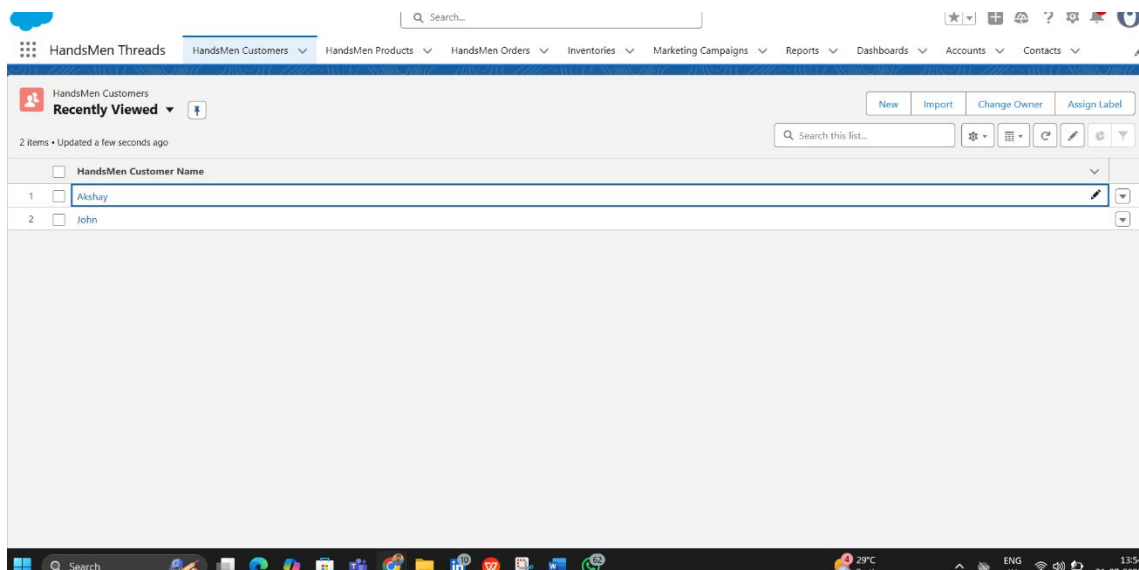


Fig:UI Of HandsMen Threads

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.