Handsmen Threads: Elevating the Art of Sophistication in Mens' Fashion

ABSTRACT

The Handsmen Customer Management project is a custom-developed Customer Relationship Management (CRM) solution built on the Salesforce Lightning Platform. It is designed to centralize, streamline, and enhance the management of customer data and interactions specific to Handsmen's business needs. This project harnesses the robust capabilities of Salesforce for data storage, automation, user interface customization, and reporting to provide a unified system that supports sales, service, and support teams.

The primary challenge addressed by this project is the dispersion and inefficiency associated with managing customer information across disparate or manual systems. By leveraging a custom Salesforce object—Handsmen_Customer__c—along with a combination of declarative automation tools such as Salesforce Flow and Apex coding, the project establishes a single source of truth for customer data. This enables real-time access, reduces errors and duplication, and automates key operational workflows such as customer onboarding, engagement tracking, and inter-team notifications.

Technologically, the project integrates custom object schemas, automated triggers, Lightning App Builder for UI customization, and analytic dashboards to provide insightful business metrics and improve decision-making. Comprehensive role-based security controls ensure that sensitive customer data is protected while remaining accessible to authorized users. Additionally, the solution incorporates scalable design principles to allow future enhancements, such as AI-driven insights, marketing integrations, and mobile accessibility.

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 etc.
- 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 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 tolls 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 Orders

Tabs:-

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

Example: A tab for Product__c allows 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:-

Profile defines 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 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 customer or users.

Example:

- “Order Confirmation Template”

Email Alerts:-

Email Alerts are actions in flows of Workflow Rules that send emails using predefined templates.

Example:

- Flow triggers email alerts on new orders.

Apex:-

Apex is a Salseforce’s object-oriented programming language. It allows developers to write custom logic.

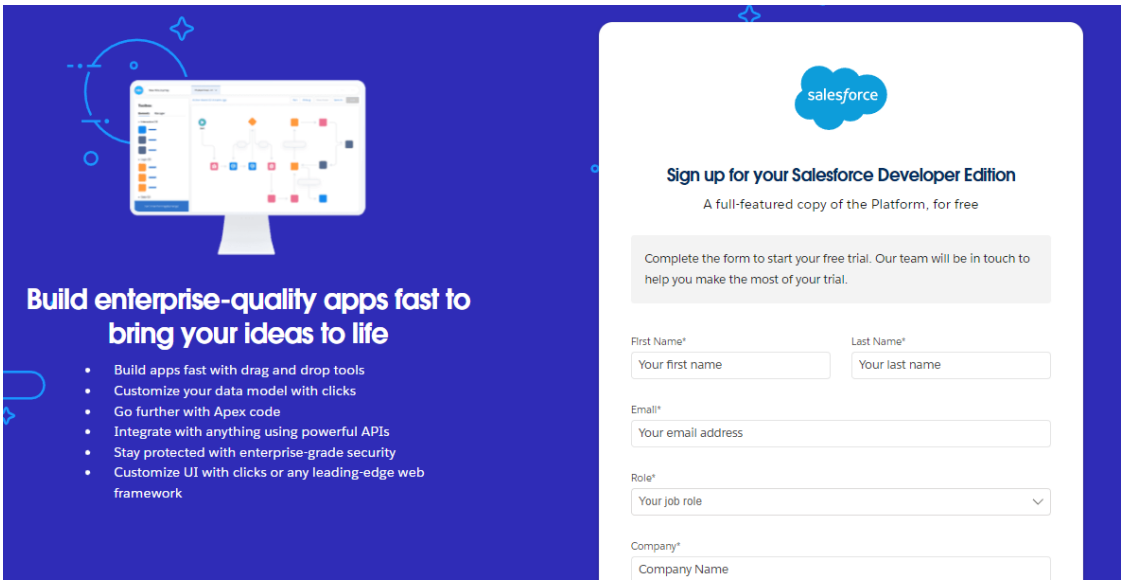
Example Triggers:-

- Update Total_Account__c in orders.
- Reduce inventory stock.

DETAILED EXECUTION OF PROJECT PHASES

1. Developer Org Setup

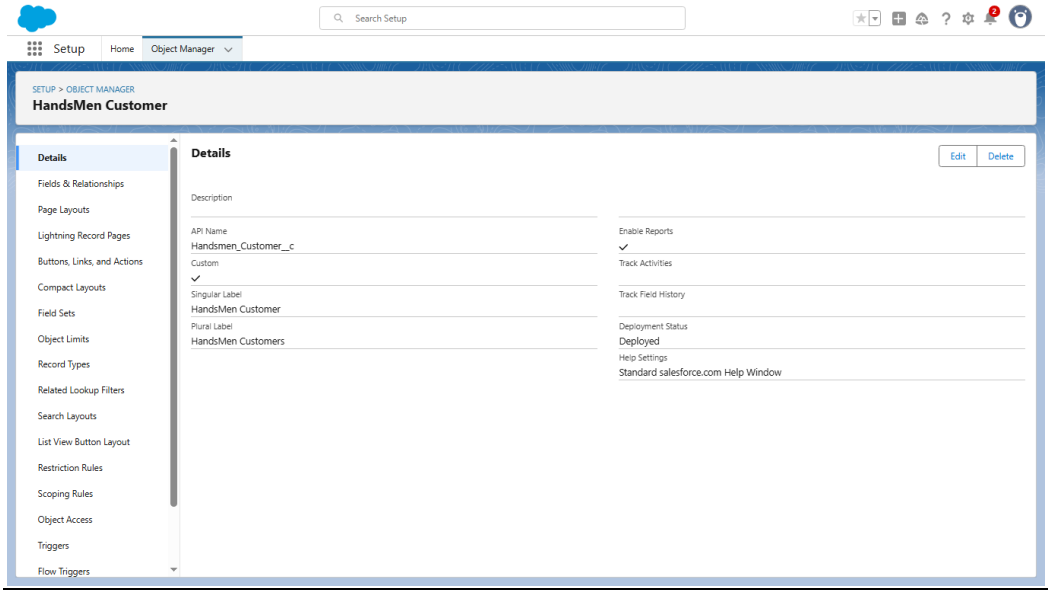
- A Salesforce Developer Org was created using https://developer.salesforce.com/signup
- The account was verified , password set, and access was granted to the Salsforce setup page.



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 SU, price and stock.
- **HandsMen Order** - Stores orders placed by customers, including quantity and status.
- **Inventory** – Tracks quantity and warehouse location.
- **Marketing Campaign** – Stores promotional campaigns and scheduling.



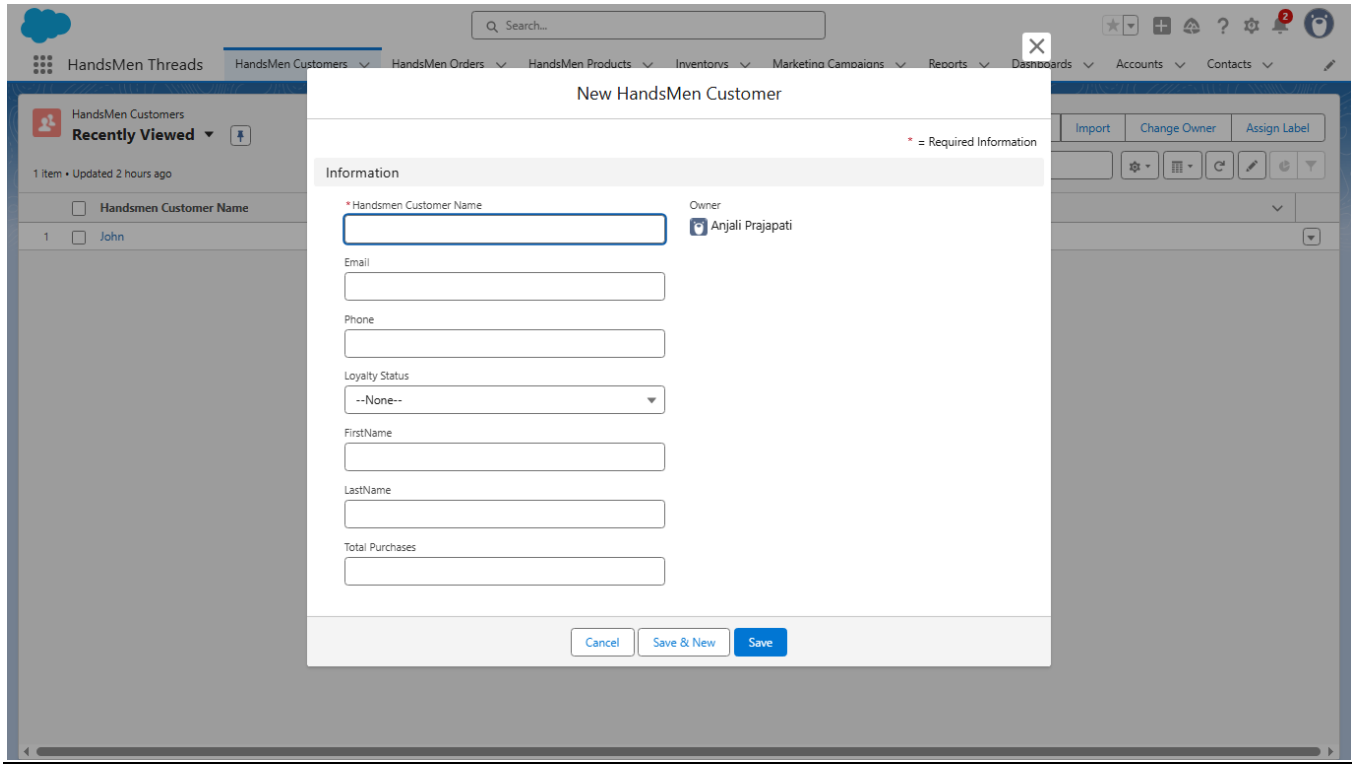
3. Creating The Lightning App

- A custom lightning app named HandsMen Threads was created.
- Included tabs: HandsMen Customer, Order, Product, Inventory, Campaign etc.
- Assigned to the System Administrator profile.

4. Validation Rules

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

- Order Object
- Customer Object



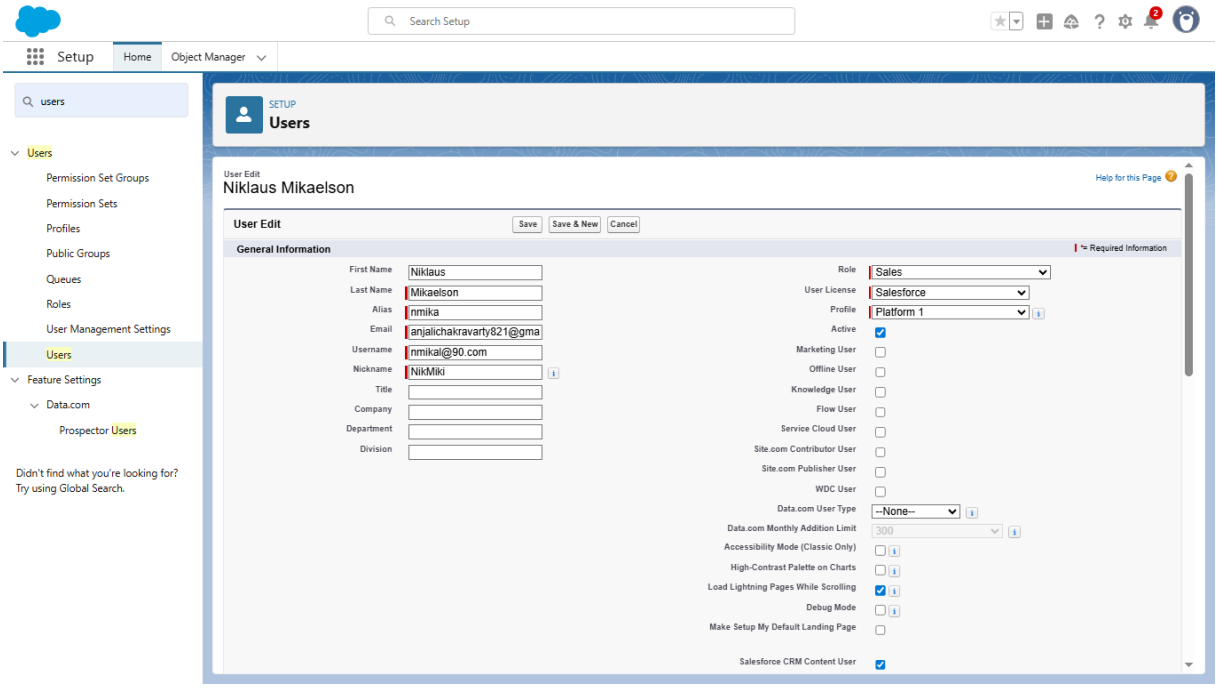
5. User Role and Profile Setup

- 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 :

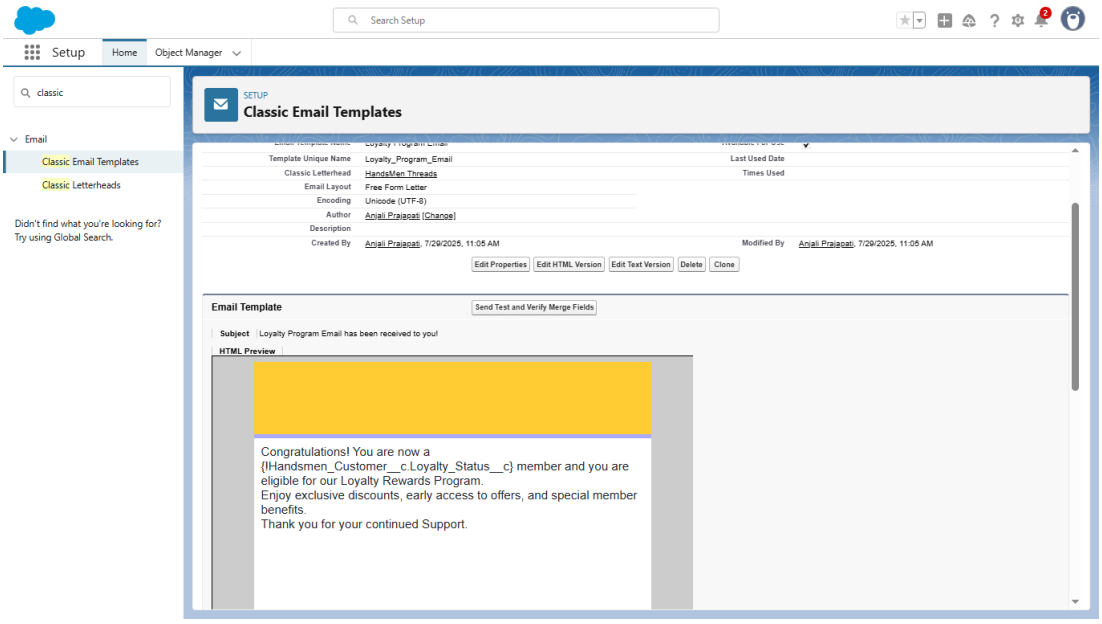
- **Niklaus Mikaelson** – Sales role
- **Kol Mikaelson** – Inventory role



7. Email Template and Alerts

Created three email templates:

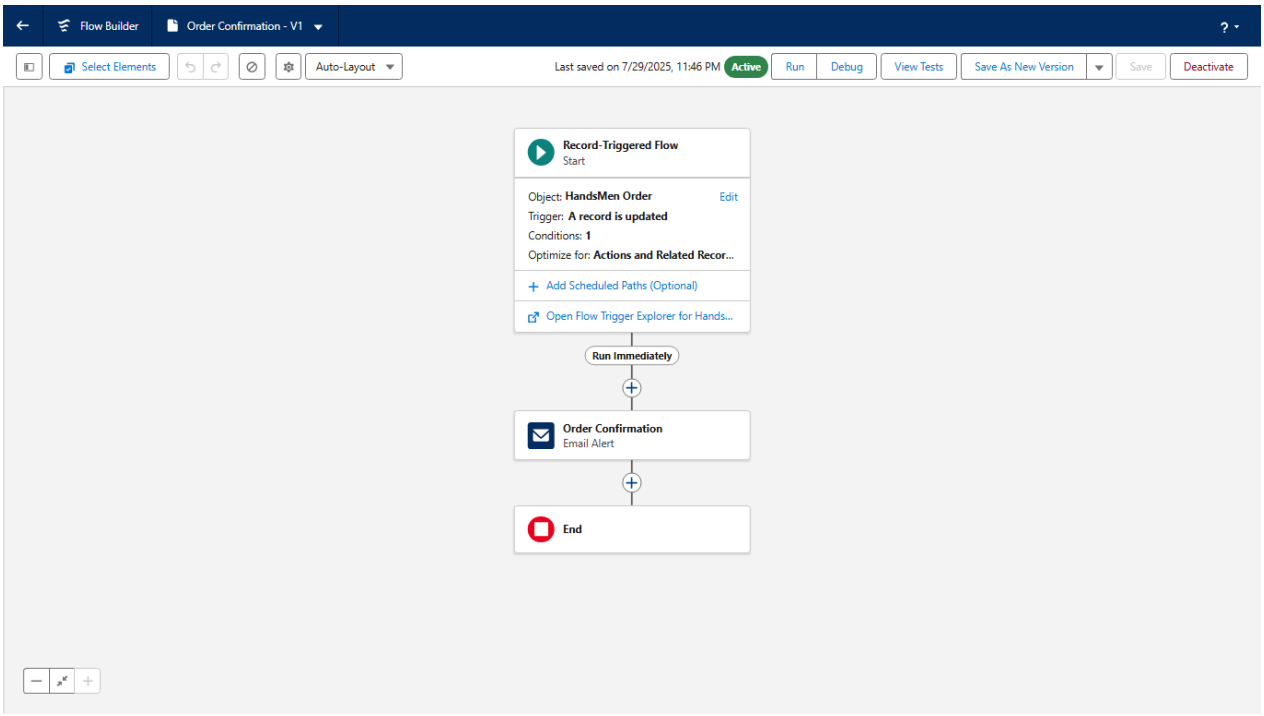
- **Order Confirmation** – Sent on order status =Confirmed
- **Low Stock Alert** – Sent when inventory < 5 units
- **Loyalty Program Email** – Sent when loyalty status changes



8. Flow Implementations

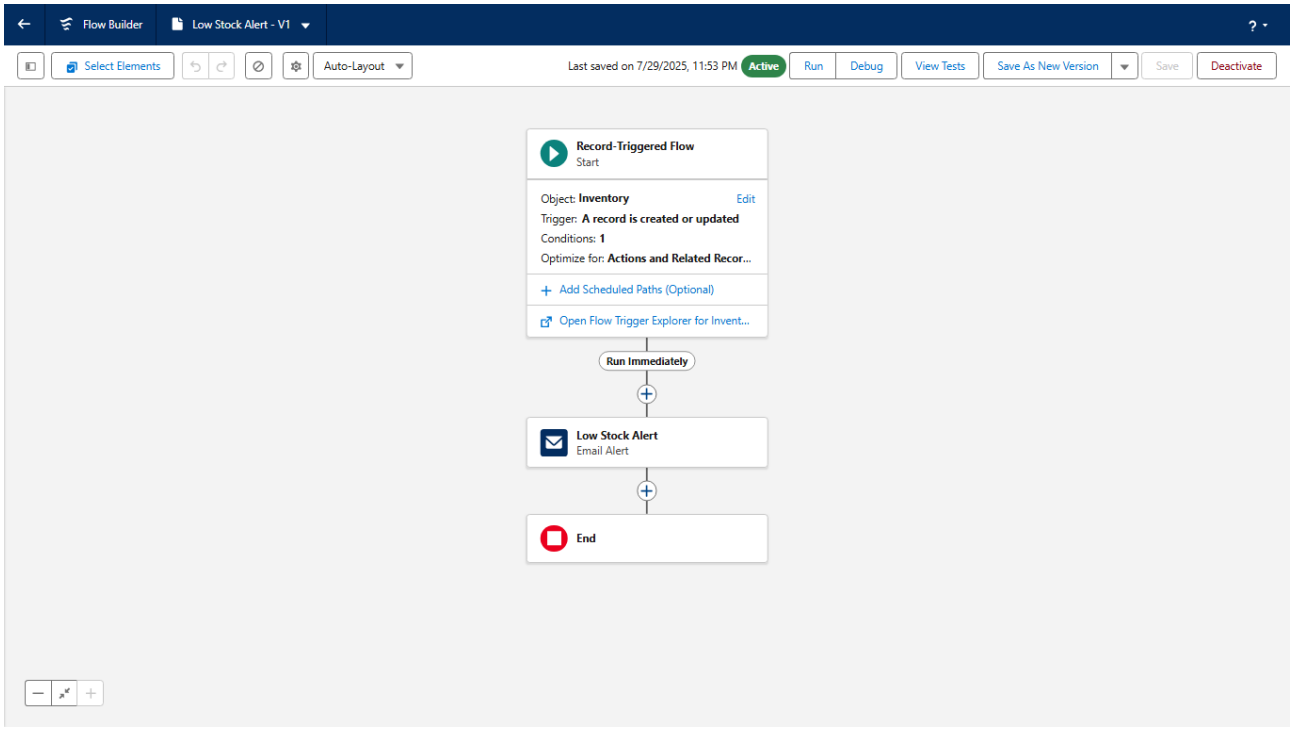
a. Order Confirmation Flow

- Triggered when an order is updated to Confirmed
- Sends an Order Confirmation email to the related customer.



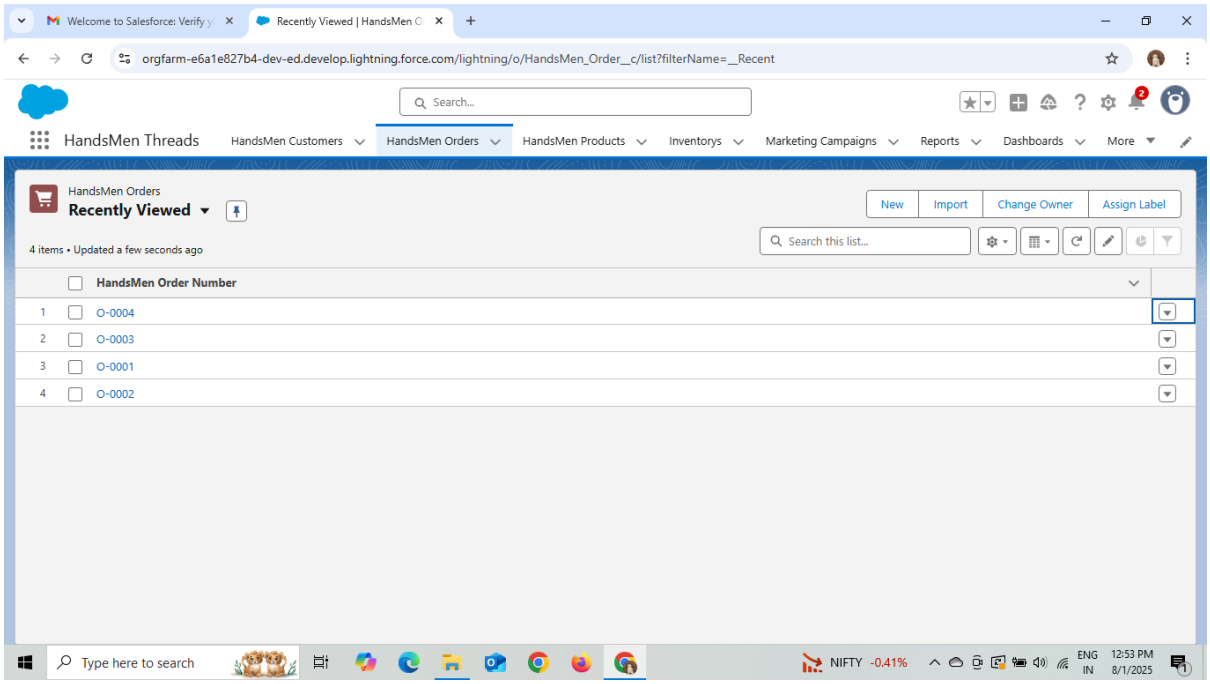
b. Stock Alert Flow

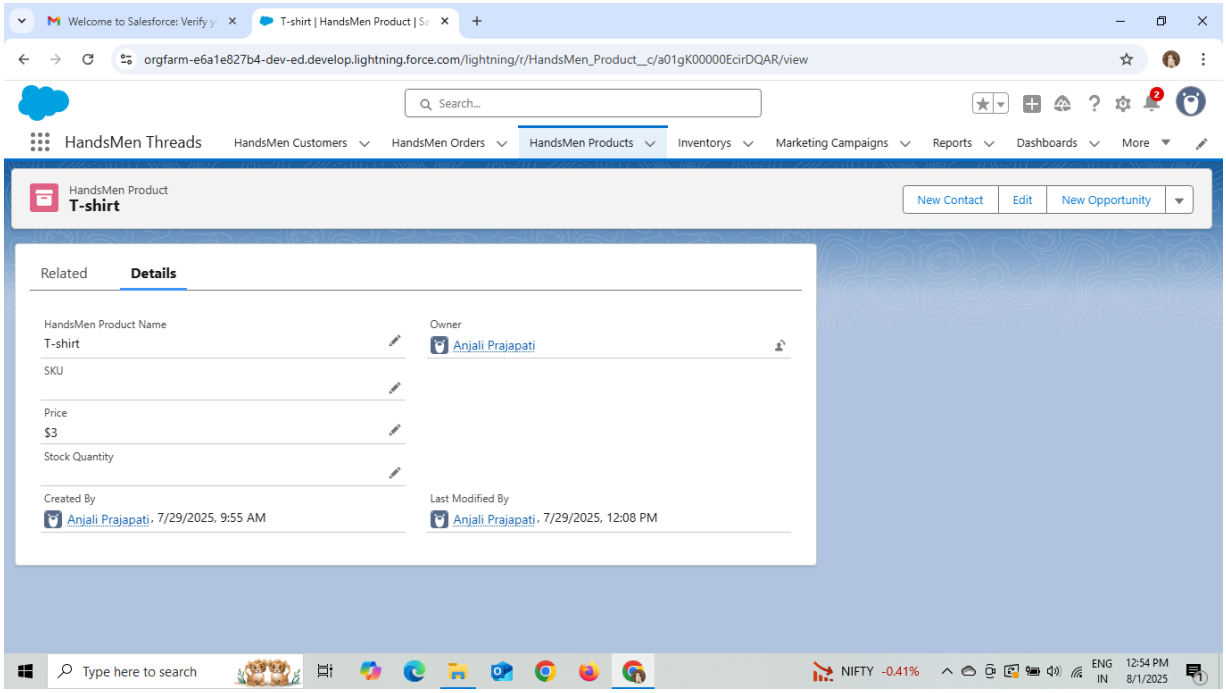
- Triggered when inventory stock drops below 5
- Sends low stock email to inventory Manager.



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.

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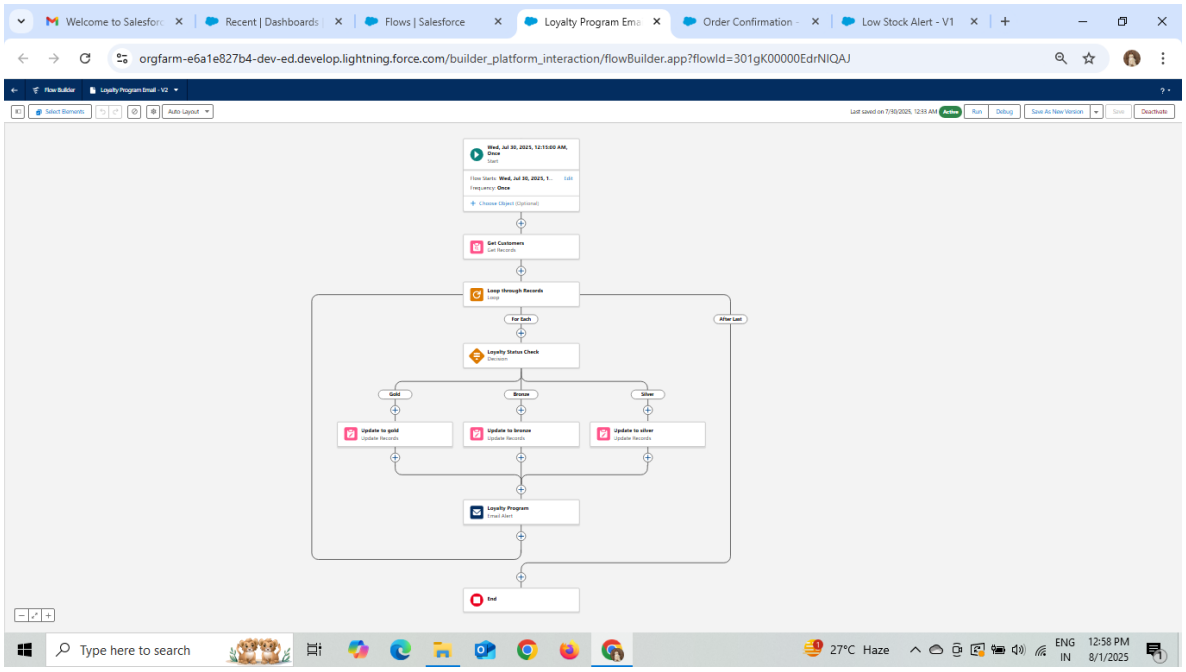
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CONCLUSION

Conclusion and Future Scope

The Handsmen Customer Management project marks a significant advancement in how Handsmen organizes and utilizes its customer data. By harnessing the full power of the Salesforce Lightning Platform, the project successfully consolidates disparate customer records into a single, secure, and scalable CRM system that is accessible across the sales, service, and support teams. This centralization eradicates data silos, improves data quality through validation and automation, and accelerates workflow efficiency by streamlining customer onboarding, engagement tracking, and communications.

One of the key achievements is the seamless automation of critical business logic using both declarative tools like Salesforce Flow and programmatic Apex triggers. This has resulted in reduced manual intervention, minimized errors, and improved responsiveness—from automatic welcome emails on new customer creation to real-time updates and notifications that keep all teams aligned. The intuitive Lightning user interface and custom dashboards empower end-users with easy access to relevant information and actionable insights, contributing to more informed decision-making and improved customer satisfaction.

Security has been thoroughly embedded into the system, ensuring that sensitive customer data is protected within Salesforce's robust access controls and auditing mechanisms. Furthermore, the system's design anticipates future growth and integration, providing a foundation that supports enhanced analytics, AI-driven insights, and seamless connectivity with external marketing or ERP platforms.

Future Enhancements and Roadmap

To maximize the long-term value of the project and adapt to evolving business needs, several avenues for future improvements are identified:

- **Integration with Marketing Automation Systems:** Connecting with tools like Pardot or third-party platforms to enable targeted campaigns and nurture customer relationships more effectively.
- **AI-Powered Predictive Analytics:** Leveraging Salesforce Einstein or similar AI capabilities to forecast customer behavior, identify churn risks, and recommend personalized next steps.
- **Mobile-First Experience:** Developing responsive Lightning components or a dedicated mobile app to empower field sales and support representatives with robust functionality on the go.
- **Enhanced Reporting and Visualizations:** Creating more granular and dynamic dashboards, including heat maps and trend analyses, to deepen business insights.
- **Expanded Automation:** Introducing more sophisticated process automations, such as multi-step approval workflows, automated contract renewals, or cross-object validations.
- **User Training and Onboarding:** Establishing comprehensive training programs and documentation to ensure smooth adoption and continued proficient use of the CRM platform by all stakeholders.

Summary

Overall, the Handsmen Customer Management project delivers a high-impact solution tailored to the organization’s customer-centric goals. It establishes a solid technical foundation, benefits users through automation and intuitive design, and supports data-driven strategies that enhance operational efficiency and customer relationships. Continuous evolution of this platform will further increase its strategic value, positioning Handsmen as a forward-thinking organization with a scalable CRM infrastructure that adapts proactively to business expansion and market demands.