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POLYTECHNIC UNIVERSITY OF THE PHILIPPINES

Office of the Vice President for Branches and Satellite Campuses

LOPEZ QUEZON BRANCH

Bachelor of Science in Information Technology

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

SUBMITTED BY:

AUSTIN JERICHO CALVELO PINEDA

BSIT - 3

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PROJECT OVERVIEW:

This project showcases the development of a fully customized Salesforce CRM for **HandsMen Threads**, a high-end menswear and tailoring company. The goal of the implementation was to optimize internal workflows, strengthen customer relationships, and ensure consistent, accurate data across all business units.

The CRM was built with a carefully planned data architecture that includes five primary custom objects: **Customer, Order, Product, Inventory, and Marketing Campaign**. Key business activities were automated through **Record-Triggered Flows, Scheduled Flows, Email Alerts, and Apex**, allowing the system to manage order notifications, update loyalty levels, and send advance alerts when stock levels drop.

To maintain data accuracy and protect sensitive records, the setup incorporated strict **validation rules** and a **role-based security model** tailored to the Sales, Inventory, and Marketing departments. In addition, a dedicated **Apex batch process** runs on schedule to monitor and update items with low inventory.

Overall, this CRM implementation improved operational productivity through automation, enhanced customer satisfaction with personalized communication, and created a scalable system capable of supporting future business expansion on the Salesforce platform.

OBJECTIVE:

The primary goal of this project is to design and deploy a tailored Salesforce CRM solution for HandsMen Threads that optimizes business workflows, protects data accuracy, and elevates overall customer experience.

Through the development of a centralized platform that manages customers, orders, products, inventory, and marketing initiatives, this project intends to:

- Automate critical business activities including order confirmation emails, loyalty level updates, and inventory stock warnings.
- Maintain clean, reliable data across departments with the use of validation rules and structured data input.
- Provide real-time insights into customer engagement and inventory status for faster and more informed decision-making.

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- Enhance collaboration among Sales, Marketing, and Inventory teams through role-based permissions and secure access controls.
- Strengthen customer relationships by delivering personalized communication and loyalty-focused marketing strategies.

TECHNOLOGY DESCRIPTION:

Salesforce

Salesforce is a cloud-based Customer Relationship Management (CRM) platform designed to help organizations manage customer information, automate business processes, and enhance sales, service, and marketing performance. It offers both point-and-click configuration tools and programmatic features such as Apex and Flows to build customized business solutions.

Custom Objects

Objects in Salesforce function like tables in a database. Custom Objects are created to store business-specific information.

Examples:

- **Customer__c** – Contains customer details
- **Product__c** – Stores product information
- **Order__c** – Tracks orders placed by customers

Tabs

Tabs allow users to access object records directly from the Salesforce interface.

Example:

A **Product** tab provides quick access to view, create, and manage product records.

Custom App

A Salesforce App is a set of tabs and components grouped together to support a particular business function or department.



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Profiles

Profiles determine what a user is allowed to access and perform in Salesforce. They control object permissions, field-level access, and general user capabilities.

Roles

Roles define the level of record visibility for users based on the organization's role hierarchy. They are used for sharing rules and reporting purposes.

Permission Sets

Permission Sets provide additional access or capabilities to users without modifying their profile. They are used to assign extra permissions when needed.

Validation Rules

Validation Rules verify that the data entered into Salesforce meets business requirements before saving.

Examples:

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

Email Templates

Email Templates are predefined message formats used to send emails to customers or internal users.

Example:

An **Order Confirmation** email template sent after a purchase.

Email Alerts

Email Alerts are automated actions—usually triggered through Flows or Workflow Rules—that send emails using specific templates.

Example:

Automatically sending a notification to customers when their loyalty status is updated.



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Flows

Flows are no-code automation tools used to execute business logic such as creating or updating records, sending alerts, or guiding users through screens.

Example:

A flow that sends an order confirmation email whenever a new order is created.

Apex

Apex is Salesforce's programming language used for complex automation and business logic that cannot be achieved through point-and-click tools.

Example (Trigger use case):

- Recalculate total order amount after items are added
- Reduce inventory count when an order is confirmed

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 consists of two parts. On the left, there is a dark blue promotional banner for Salesforce. It features a white computer monitor displaying a screenshot of the Salesforce interface, which shows various data tables and charts. Below the monitor, the text reads "Build enterprise-quality apps fast to bring your ideas to life" and lists several features: "Build apps fast with drag and drop tools", "Customize your data model with clicks", "Go further with Apex code", "Integrate with anything using powerful APIs", "Stay protected with enterprise-grade security", and "Customize UI with clicks or any leading-edge web framework". On the right, there is a screenshot of the "Sign up for your Salesforce Developer Edition" page. The page has a light blue header with the Salesforce logo. Below the header, it says "Sign up for your Salesforce Developer Edition" and "A full-featured copy of the Platform, for free". There is a text box stating "Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial." Below this, there are five input fields: "First Name*" with placeholder "Your first name", "Last Name*" with placeholder "Your last name", "Email*" with placeholder "Your email address", "Role*" with placeholder "Your job role" (a dropdown menu), and "Company*" with placeholder "Company Name".

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2. Custom Object Creation

To capture and manage key business data, five custom objects were created in Salesforce:

- **HandsMen Customer** – Stores customer information such as name, email, phone number, and loyalty status.
- **HandsMen Product** – Maintains product catalog details including SKU, price, and available stock.
- **HandsMen Order** – Records customer orders with details like quantity, order date, and status.
- **Inventory** – Tracks stock levels and warehouse locations for each product.
- **Marketing Campaign** – Stores details of promotional campaigns, including scheduling and target audience.

Steps Followed to Create Custom Objects:

- **Navigate to Setup → Object Manager → Create → Custom Object.**
- Enter the Label and Object Name, and enable options such as Reports and Allow Search.
- Save the custom object.
- Create a Tab for each object to allow easy access to its records from the Salesforce interface.

This structured setup ensures that all critical business data is stored in a centralized and easily manageable way, ready for automation and reporting.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'OBJECT MANAGER' followed by 'HandsMen Customer'. On the left, a sidebar lists various object configuration tabs: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Competitor Layouts, Field Sets, Object Limits, Record Types, Related Lookups, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, Object Access, Triggers, Flow Triggers, and Validation Rules. The right side of the screen displays the 'Details' tab for the 'HandsMen Customer' object. It shows the 'Label' field set to 'HandsMen Customer' and the 'Singular Label' field set to 'HandsMen Customer'. Other visible fields include 'Description', 'API Name' (set to 'HandsMen_Customer_c'), 'Custom' (set to 'Custom'), 'Track Field History' (unchecked), and 'Deployment Status' (set to 'Deployed'). Buttons for 'Edit' and 'Delete' are located at the bottom right of the form.

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3. Creating the Lightning App

- A custom **Lightning App** named **HandsMen Threads** was created to centralize all key business operations.
- The app included the following **tabs**: HandsMen Customer, HandsMen Order, HandsMen Product, Inventory, Marketing Campaign, Reports, and others as needed.
- The app was **assigned** to the **System Administrator** profile for full access and management capabilities.

4. Validation Rules

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

- **Order Object** – Prevents saving an order if the **Total Amount ≤ 0**.
Error Message: "Please Enter Correct Amount"
- **Customer Object** – Validates that the **Email** field contains **@gmail.com**.
Error Message: "Please fill Correct Gmail"

New HandsMen Customer

* = Required Information

Information	
* HandsMen Customer Name	Austin
Email	<input type="text" value="austin"/> (*) We hit a snag.
Phone	<input type="text"/>
Loyalty Status	<input type="text" value="--None--"/>
FirstName	<input type="text"/>
LastName	<input type="text"/>
Total Purchases	<input type="text"/>
We hit a snag.	
Review the following fields	
• Email	
<input type="button" value="Cancel"/> <input type="button" value="Save & New"/> <input type="button" value="Save"/>	

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5. User Role & Profile Setup

1. The **Standard User** profile was cloned to create a new profile named **Platform 1**, which was then granted access to all necessary custom objects.
2. **Roles** were created for different departments to control data visibility and hierarchy:
 - Sales Manager
 - Inventory Manager
 - Marketing Team

6. User Creation

1. Users were added to Salesforce and assigned **appropriate roles and profiles** according to their responsibilities:
 - **Niklaus Mikaelson** – Assigned the **Sales Manager** role
 - **Kol Mikaelson** – Assigned the **Inventory Manager** role
2. These role-based assignments ensure **secure data access**, proper workflow control, and accurate process management within the system.

The screenshot shows the Salesforce User Edit interface for a user named "Niklaus Mikaelson". The left sidebar navigation includes "Setup", "Home", "Object Manager", "Users" (selected), "Feature Settings", "Data.com", "Prospector Users", "Service", "Embedded Service", "Enhanced Chat User", and "Verification". The main content area displays the "User Edit" screen for "Niklaus Mikaelson". The "General Information" section contains fields for First Name (Niklaus), Last Name (Mikaelson), Alias (nmika), Email (austinpineda64@gmail.com), Username (austinpineda6921@gmail.com), Nickname (User176354694632918696), Title (empty), Company (empty), Department (empty), and Division (empty). To the right, there are dropdown menus for Role (Sales), User License (Salesforce), Profile (Platform 1), and Active (checked). Other optional checkboxes include Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, and Data.com User Type (None).

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7. Email Templates & Alerts

1. Created the following **email templates** for automated communication:
 - **Order Confirmation** – Sent when an order status is updated to *Confirmed*.
 - **Low Stock Alert** – Triggered when inventory levels fall below 5 units.
 - **Loyalty Program Update** – Sent whenever a customer's loyalty status changes.
2. **Email Alerts** were configured for each template and linked to **automation flows** to ensure timely and accurate notifications.

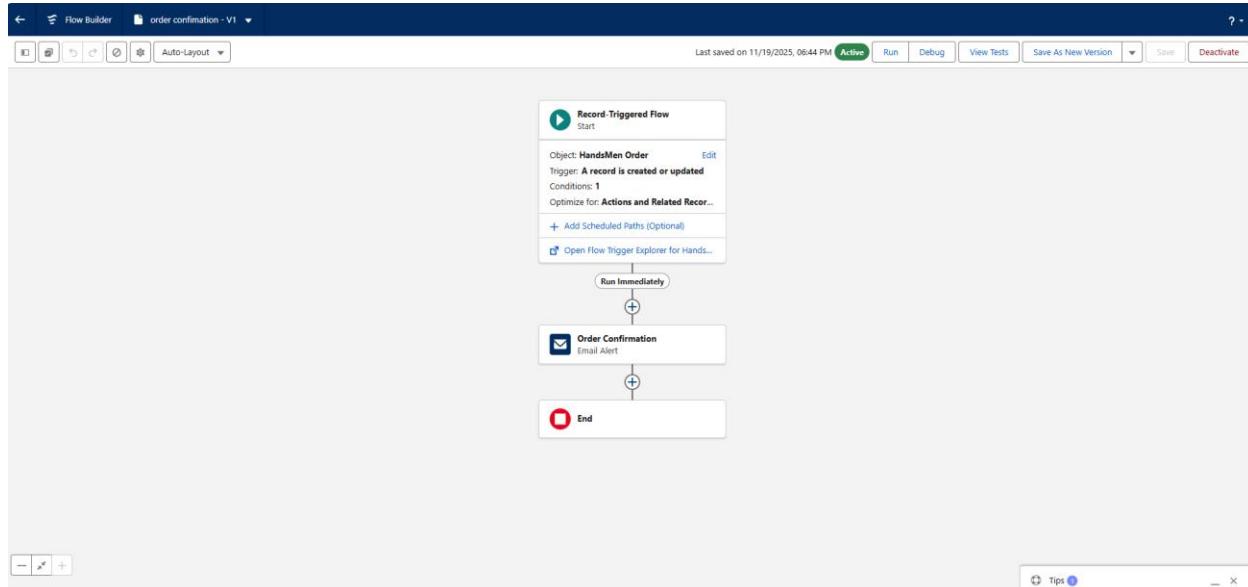
A screenshot of the Salesforce Classic Email Templates page. The page title is "Classic Email Templates". On the left, there is a sidebar with navigation links: Setup, Home, Object Manager, and a search bar. Under "Email", there are links for "Classic Email Templates" (which is selected), "Classic Letterheads", "Custom Code", "Apex Classes", "Data Classification", "Data Classification Download", "Data Classification Settings", and "Data Classification Upload". A note at the bottom says "Didn't find what you're looking for? Try using Global Search." The main content area shows the details for the "Order_Confirmation_Email" template. It includes fields for "Email Template Name" (Order_Confirmation_Email), "Template Unique Name" (Order_Confirmation_Email), "Classic Letterhead" (HandsMen_Threads), "Email Layout" (Free Form Letter), "Encoding" (Unicode (UTF-8)), "Author" (Austin Pineda [Change]), "Description" (Created By Austin Pineda, 11/19/2025, 2:31 AM), and "Last Used Date" (Times Used). There are buttons for "Edit Properties", "Edit HTML Version", "Edit Text Version", "Delete", and "Clone". At the bottom, there is an "HTML Preview" section showing the email content: "Subject: Your Order has been Confirmed!" and "Dear {HandsMen_Order__c.HandsMen_Customer__c}, Your order #{HandsMen_Order__c.Name} has been confirmed! Thank you for shopping with us. Best Regards, Sales Team".



8. Flow Implementations

A. Order Confirmation Flow

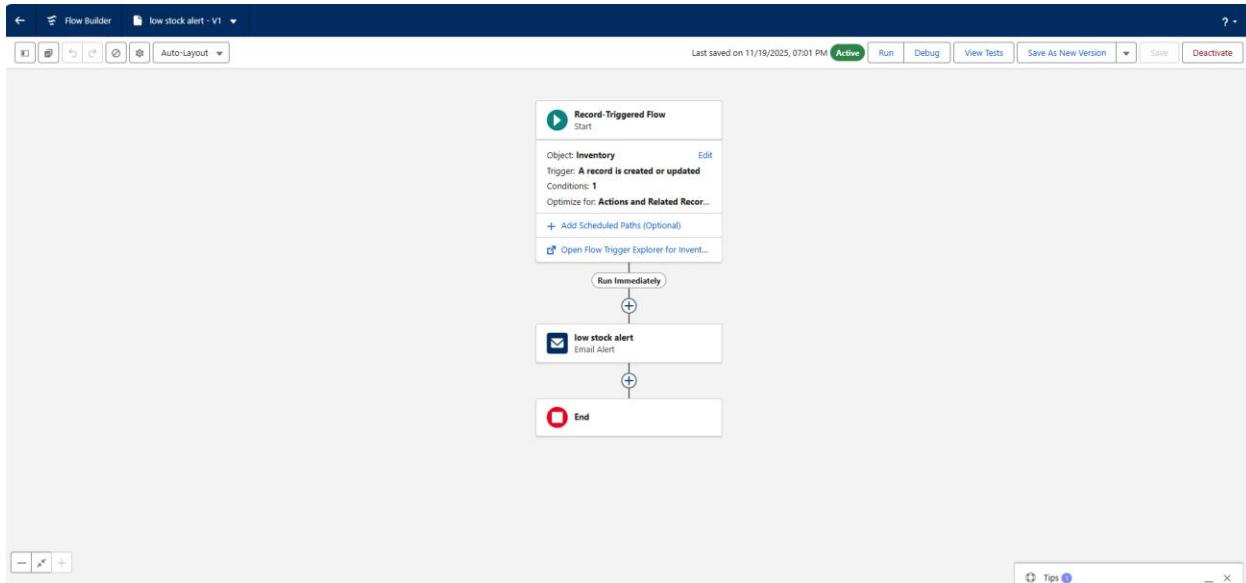
- Triggered automatically when an order is updated to *Confirmed*.
- Sends a personalized **Order Confirmation email** to the associated customer, ensuring they are promptly informed of their order status.





B. Stock Alert Flow

- Triggered automatically when a product's inventory falls below 5 units.
- Sends a **Low Stock Alert email** to the **Inventory Manager** to ensure timely restocking.





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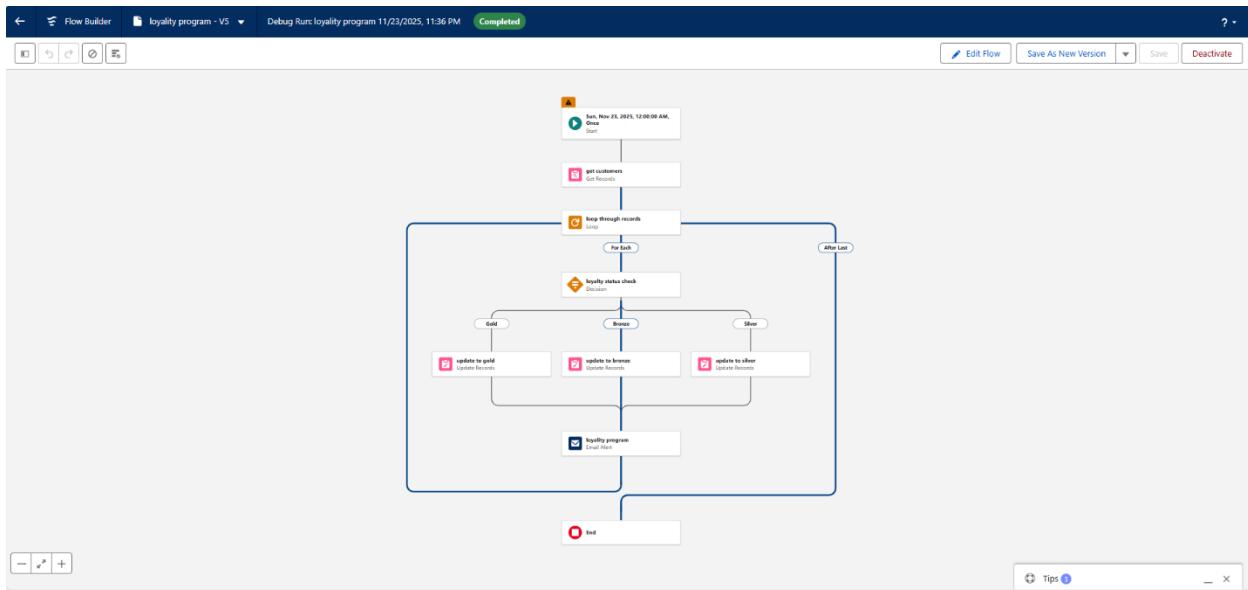
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C. Scheduled Loyalty Update Flow

- Runs **daily at midnight**.
- Iterates through all customers and updates their **Loyalty Status** based on cumulative purchases, ensuring the loyalty program is always current.





8. Apex Triggers

1. Order Total Trigger

- Automatically calculates the **Total Amount** of an order using the quantity and unit price of products.

2. Stock Deduction Trigger

- Reduces inventory stock automatically whenever an order is placed, maintaining accurate stock levels.

3. Loyalty Status Trigger

- Updates a customer's **Loyalty Status** based on their total purchases, supporting automated rewards and benefits.
-

PROJECT EXPLANATION WITH REAL WORLD EXAMPLE

Let's follow the journey of a customer using the Salesforce CRM system:

1. Customer Registration

- A customer, **Elijah Mikaelson**, visits the store or the online website.
- In Salesforce, a **Customer record** is created containing his name, phone number, email, and other details.
- **Validation Rule:** Ensures the email is in the correct format (e.g., must include @gmail.com).

2. Product Setup

- The admin adds products, such as **Shirts** and **Jeans**, to the **Product__c** object.
- Each product includes details like price, SKU, and description.
- **Inventory records** are created to track stock levels for each product.



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3. Order Placement

- Elijah decides to purchase **2 shirts** (₹2500 each).
- A new **Order record** is created in Salesforce.
- **Apex Trigger:** Automatically calculates the **Total Amount**.
 - Example calculation: $2 \times ₹2500 = ₹5000$

4. Inventory Update

- **As soon as the order is placed:**
 - **Inventory Trigger:** Reduces the stock of shirts by 2.
 - **Validation Rule:** Ensures stock cannot go below 0, preventing negative inventory.

5. Loyalty Program

- **Elijah's total purchase now amounts to ₹5000.**
- A **Customer Apex Trigger** evaluates total purchases and updates loyalty status based on thresholds:
 - < ₹500 → Bronze
 - ₹500–₹1000 → Silver
 - ₹1000 → Gold
- In this example, Elijah becomes a **Silver member**.

6. Email Notifications

- **When a new order is placed or loyalty status changes:**
 - **Flow + Email Alert** is triggered.
 - Elijah receives an email such as:
"Thank you for your purchase! Your loyalty status is now Silver."



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7. Users and Roles

- Salesforce users are created for staff, with appropriate roles and profiles:
 - **Niklaus Mikaelson** – Sales Role (**Platform 1 Profile**)
 - **Kol Mikaelson** – Inventory Role (**Platform 1 Profile**)

SCREENSHOTS

The screenshot shows a custom Salesforce application interface. At the top, there is a navigation bar with various tabs: 'HandsMen Threads' (selected), 'HandsMen Customers', 'HandsMen Orders', 'HandsMen Products', 'Inventory', 'Marketing Campaigns', 'Reports', 'Dashboards', 'Accounts', and 'Contacts'. Below the navigation bar, there is a 'Recently Viewed' section with a dropdown menu and a search bar. This section lists '2 items • Updated a few seconds ago': 'Rosabelle' and 'Jacob'. To the right of this section is another search bar and a set of icons for 'New', 'Import', 'Change Owner', and 'Assign Label'. The main content area is currently empty.

FIG: CUSTOM APP FOR HandsMen Threads

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A screenshot of the HandsMen Threads software interface. The top navigation bar includes "HandsMen Threads", "HandsMen Customers", "HandsMen Orders", "HandsMen Products", "Inventorys", "Marketing Campaigns", "Reports", "Dashboards", "Accounts", and "Contacts". A search bar and various tool icons are also present. The main content area shows a customer record for "Rosabelle". The "Details" tab is selected, displaying fields such as "HandsMen Customer Name" (Rosabelle), "Email" (austinpineda54@gmail.com), "Phone", "Loyalty Status" (Bronze), "FirstName" (Rosabelle), "LastName" (Calvelo), "FullName" (Rossabelle Calvelo), "Total Purchases" (500), and "Created By" (Austin Pineda). The record was created on 11/23/2025, 7:36 AM. The "Owner" is listed as Austin Pineda. A "Last Modified By" field shows the same information. Action buttons at the bottom right include "New Contact", "Edit", and "New Opportunity".

FIG: CUSTOMER CREATION IN HandsMen Threads

A screenshot of the HandsMen Threads software interface, similar to the previous one but with different navigation options. The top navigation bar includes "HandsMen Threads", "HandsMen Customers", "HandsMen Orders", "HandsMen Products", "Inventorys", "Marketing Campaigns", "Reports", "Dashboards", "Accounts", and "Contacts". The "HandsMen Products" tab is selected. The main content area shows a product record for "T Shirt Clothing". The "Details" tab is selected, displaying fields such as "HandsMen Product Name" (T Shirt Clothing), "SKU" (TST001), "Price" (\$10), "Stock Quantity" (5), and "Created By" (Austin Pineda). The record was created on 11/23/2025, 6:57 AM. The "Owner" is listed as Austin Pineda. A "Last Modified By" field shows the same information. Action buttons at the bottom right include "New Contact", "Edit", and "New Opportunity".

FIG: PRODUCTS IN HandsMen Threads



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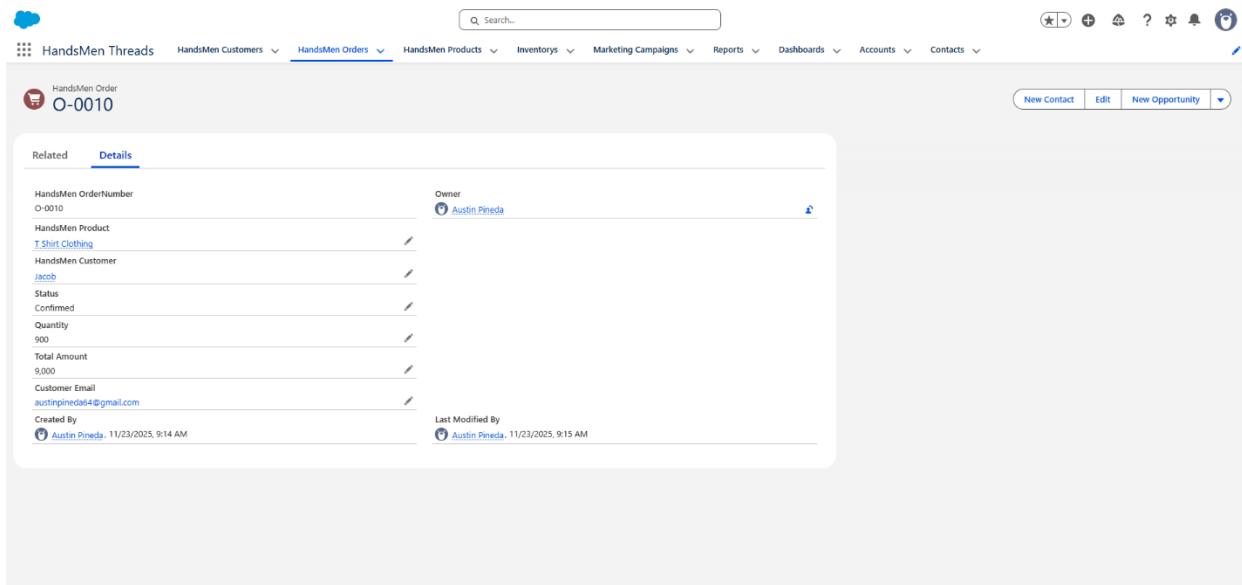
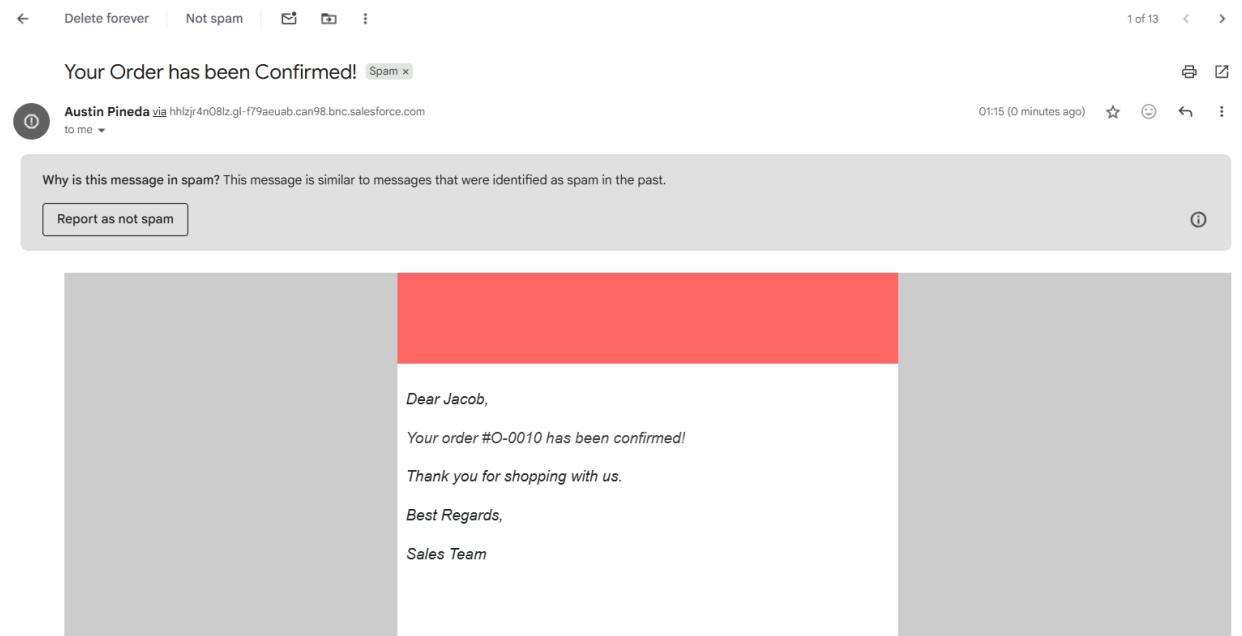


FIG: ORDER CONFIRMATION



Your Order has been Confirmed! [Spam x](#)

Austin Pineda via hhlzjr4n08l.zgl-f79aeuab.can98.bnc.salesforce.com
to me ▾

01:15 (0 minutes ago) [Star](#) [Reply](#) [Forward](#) [More](#)

Why is this message in spam? This message is similar to messages that were identified as spam in the past.

[Report as not spam](#)

[Redacted text block]

Dear Jacob,
Your order #O-0010 has been confirmed!
Thank you for shopping with us.
Best Regards,
Sales Team

FIG: ORDER CONFORMATION EMAIL



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← Delete forever | Not spam | 📲 📎 ⚙️

2 of 13 < >

Low Stock Alert Email Spam x

Austin Pineda via nwrszv44k5r5.g1-f79aeuab.can98.bnc.salesforce.com to me ▾

01:11 (8 minutes ago) ⭐ 😊 ↵ ⋮

Why is this message in spam? This message is similar to messages that were identified as spam in the past.

Report as not spam ⓘ

Dear Inventory Manager,
This is to inform you that the stock for the following product is running low.
Product Name: T Shirt Clothing
Current Stock Quantity: 4
Please take the necessary steps to restock this item immediately.
Best Regards,
Inventory Monitoring System

Reply Forward 📲

FIG: LOW STOCK ALERT EMAIL

← Delete forever | Not spam | 📲 📎 ⚙️

3 of 13 < >

Loyalty Program Email Spam x

Loyalty Support Team via owqwc0hefutwl.g1-f79aeuab.can98.bnc.salesforce.com to me ▾

Sun 23 Nov, 23:36 (1 hour ago) ⭐ 😊 ↵ ⋮

Why is this message in spam? This message is similar to messages that were identified as spam in the past.

Report as not spam ⓘ

Congratulations! You are now a Bronze 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.

FIG: LOYALTY PROGRAM EMAIL



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CONCLUSION

The implementation of the customized Salesforce CRM for **HandsMen Threads** successfully streamlined business operations, improved data accuracy, and enhanced customer engagement. By creating centralized objects for Customers, Products, Orders, Inventory, and Marketing Campaigns, the system provides a structured and efficient way to manage key business processes. Automation through **Flows, Apex Triggers, and Email Alerts** has reduced manual work, ensured timely notifications, and maintained accurate stock and loyalty records. Role-based access and profiles secured data while enabling proper team collaboration. Overall, this CRM solution delivers a scalable and robust foundation to support the company's growth and improve overall customer experience.

FUTURE SCOPE

The Salesforce CRM system for HandsMen Threads can be further enhanced with the following improvements:

1. **Mobile Integration:** Enable mobile access so sales staff and managers can update orders, check inventory, and communicate with customers on the go.
2. **Advanced Analytics & Reporting:** Implement dashboards and AI-powered insights for sales trends, inventory forecasting, and customer behavior analysis.
3. **Integration with E-commerce Platforms:** Connect the CRM with online stores for real-time order management and inventory updates.
4. **Enhanced Loyalty Programs:** Incorporate tiered rewards, automated promotions, and personalized offers based on customer preferences.
5. **Chatbots & Customer Self-Service:** Provide automated customer support for inquiries, order tracking, and product recommendations.
6. **Marketing Automation:** Expand campaign management with targeted email campaigns, social media integration, and performance tracking.

These enhancements will allow HandsMen Threads to further optimize operations, drive customer satisfaction, and support scalable business growth.