HANDSMAN THREADS: ELEVATING THE ART OF SOPHISTICATION IN MEN'S FASHION

ABSTRACT

The fashion industry, especially the bespoke tailoring segment, demands personalized attention to customers and precision in managing product orders, inventories, and marketing outreach. Handsman Threads, a premium men's fashion brand, required a digital transformation to enhance customer satisfaction and operational efficiency. This Salesforce CRM project aims to address these challenges by creating a centralized system for customer data, order processing, inventory tracking, and campaign management. By leveraging Salesforce's robust cloud ecosystem — including automation tools, custom development via Apex, and analytics — the project successfully introduces a scalable CRM tailored for a luxury brand.

OBJECTIVE

The primary goal of this project is to develop a comprehensive, customized Salesforce CRM solution for Handsman Threads with the following objectives:

- Centralized Data Management: Maintain organized and accessible data for customers, products, orders, and inventory.

- Streamlined Order Processing: Automate order entry, calculations, and confirmations to reduce manual intervention.

- Personalized Customer Experience: Use Flows and validation rules to ensure clean data and send timely, personalized communications.

- Inventory Optimization: Monitor and automate low-stock alerts to prevent stockouts and ensure smooth supply chain operations.

- Performance Analytics: Generate actionable insights through custom dashboards and reports.

TECHNOLOGY DESCRIPTION

The project utilizes the full potential of the Salesforce Lightning Platform, incorporating both declarative (point-and-click) and programmatic (code-based) features:

- Custom Objects: Built to manage customers, products, inventory, and orders tailored to the brand's workflow.

- Validation Rules: Ensures only valid data is stored (e.g., restricts non-Gmail email domains).

- Record-Triggered Flows: Automates business logic such as order confirmations and inventory adjustments in real-time.

- Scheduled Flows: Periodically evaluates loyalty status and updates records without user intervention.

- Email Alerts: Sends real-time notifications to both customers and internal stakeholders.

- Apex Triggers: Handles dynamic calculations like auto-generating order totals.

- Lightning App Builder: Crafts a customized app layout to improve user navigation and experience.

- Reports and Dashboards: Visualizes KPIs like sales trends, customer acquisition, and product demand.

PROJECT EXECUTION PHASES

1. Developer Org Creation

- Created a free Salesforce Developer Edition Org for testing.

- Configured profiles, permissions, and user roles.

- Enabled Lightning Experience and API support.

- Used Schema Builder to visualize relationships.

2. Custom Org Setup

- A custom Lightning app named Handsman Threads was configured.

- Tabs for Handsman Customers, Orders, Products, Inventories, and Campaigns were added to the app.

- UI was tailored for ease of use — minimalistic layout with compact page designs for faster workflow.

3. Custom Objects Configuration

Custom objects were designed with fields, relationships, and automation logic:

- Handsman Customers: Fields like Name, Email, Loyalty Tier, and Total Purchases.

- Handsman Products: Included SKU, Name, Price, and Description.

- Inventories: Related to Products, includes stock level, warehouse location.

- Handsman Orders: Linked to Customer and Product objects with status, quantity, and total fields.

- Marketing Campaigns: Captured campaign names, types, durations, and results.

4. UI and Record Management

- **Enhanced Lightning record pages with:**

- Dynamic Forms and Conditional Fields

- Quick Actions to streamline data entry

- Lookup fields for relating records easily

- **Demonstrated validations like:**

  - Gmail-only customer registration (error if not ending in "@gmail.com")

  - Quantity > 0 enforcement on orders

5. Lightning App Implementation

- Built a seamless interface under App Launcher → Handsman Threads

- Included:

 - Navigation bar with relevant tabs

  - Custom logos and color themes

  - Global search optimization

<u>BUSINESS PROCESS AUTOMATION</u>

1. Order Confirmation (Record-Triggered Flow)

- Trigger: On change of order status from *Pending* to *Confirmed*

- Action:

  - Sends a personalized email using Email Alert

  - Automatically deducts quantity from inventory

- Example:

  - Sophia's order → Status changed → Email sent: *"Your order #0le8 has been confirmed. Thank you for shopping with us."*

  - Inventory adjusted: 400 → 380

**2. Low Stock Alert (Record-Triggered Flow)**

- Trigger: Inventory quantity < 5
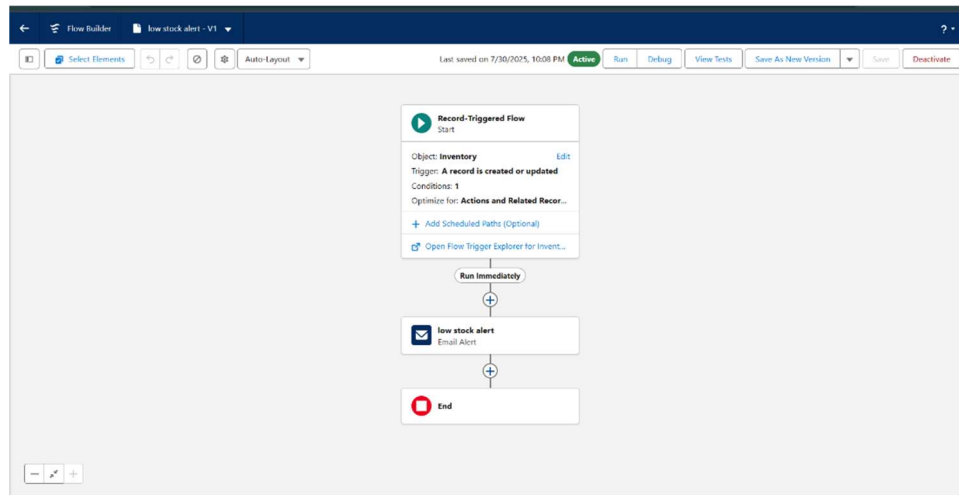
- Action:

  o Sends alert to Inventory Manager via Email Alert

- Benefit:

  o Prevents stockouts

  o Ensures timely restocking

- Example:

  o Stock reduced to 4 units → Alert sent with product details

3. Loyalty Program (Scheduled Flow)

- Trigger: Daily at 12:00 AM

- Action:

  o Scans all customers

  o Checks total purchases

  o Updates loyalty tier field (Bronze, Silver, Gold)

  o Sends status upgrade email
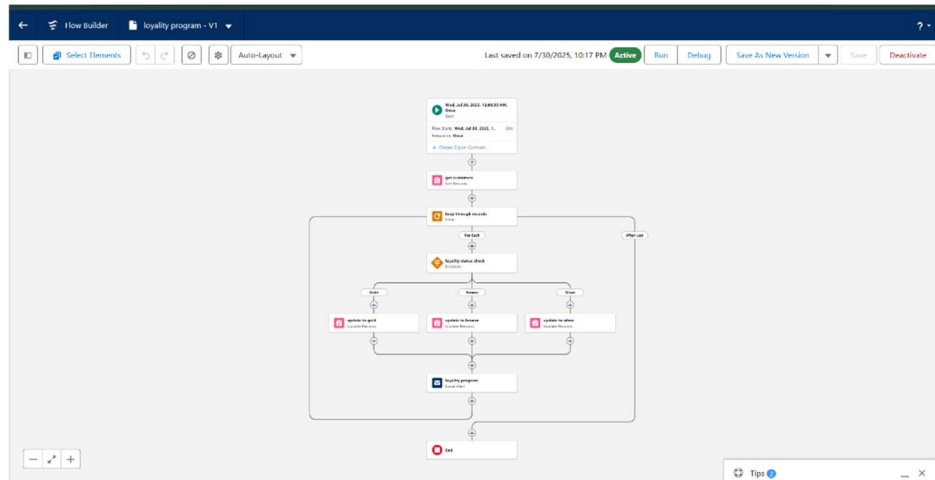
- Example:

  - Sophia's purchases → ₹500 → Upgraded to Silver

  - Email sent: *"Congratulations! You are now a Silver member."*

4. Apex Trigger: Auto Total Calculation

- Trigger: Before Insert and Before Update on Handsman Order

- Logic:

  - Fetches related product's price

  - Calculates: Total = Price × Quantity

  - Stores result in the Total field

- Benefit:

  - Prevents manual errors

  - Ensures real-time updates

REAL-WORLD EXAMPLE WORKFLOW

Scenario: A new customer, Ayesha, places an order

1. Customer Record Creation:

   o Enters "ayesha@xyz.com" → Error via validation rule

   o Changes to "ayesha@gmail.com" → Success

2. Product and Inventory:

   o Adds T-Shirt with SKU TS001, Price $3, Quantity 200

   o Adds inventory to Warehouse A with available stock = 400

3. Order Creation:

   o Selects T-Shirt, enters quantity = 20

   o Apex Trigger calculates total = $60

   o Order status set to *Pending*

4. Order Confirmation:

   o Status updated to *Confirmed*

   o Email sent to Sophia

   o Inventory reduced to 380

5. Loyalty Update (at midnight):

   o Purchases reach 500

   o Scheduled Flow updates tier to Silver

   o Email sent with rewards information
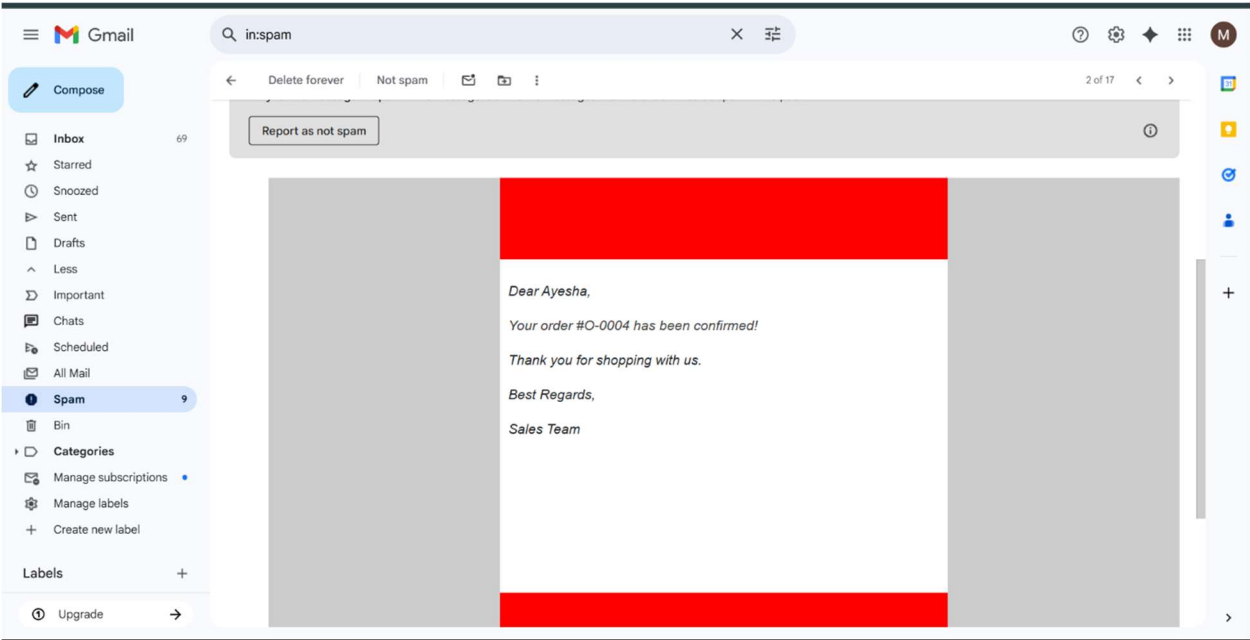
SCREENSHOTS
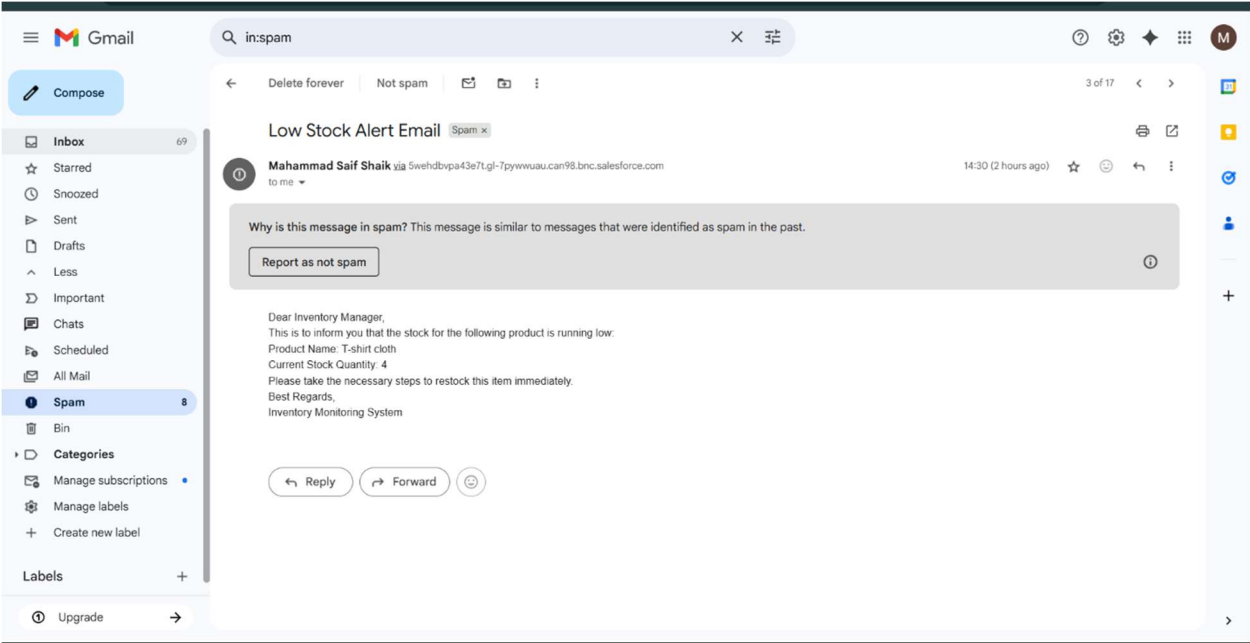
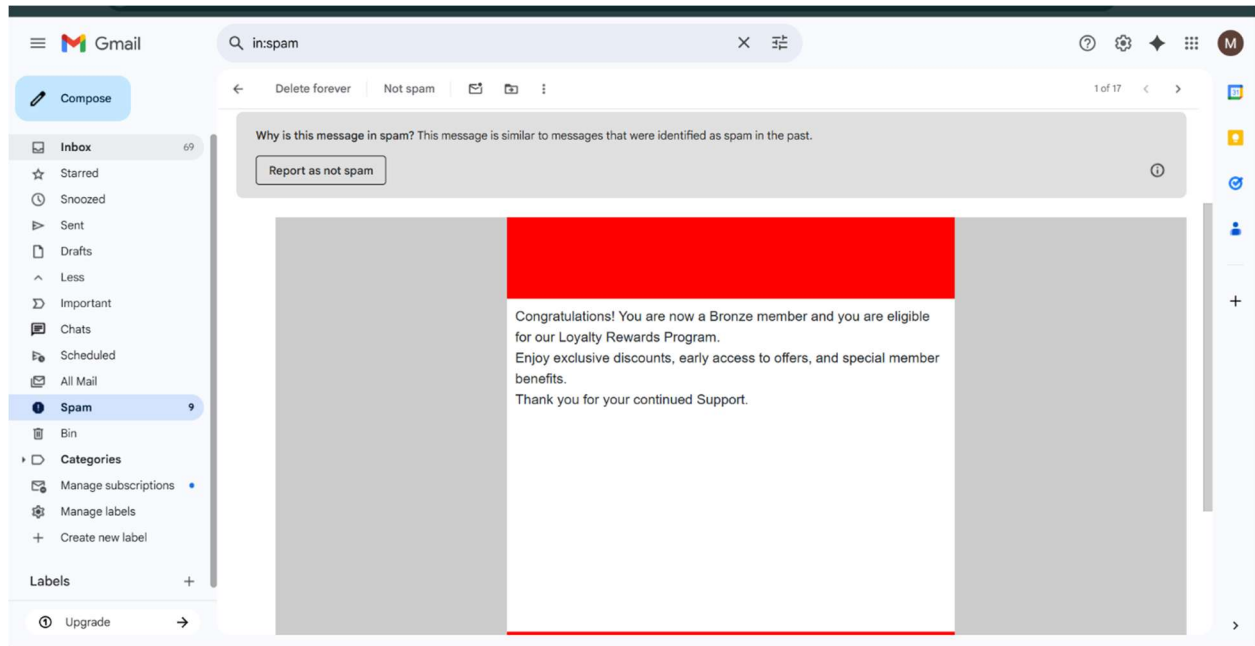**Fig 1: Low Stock Alert Email**

Fig 2: Order Confirmation Email
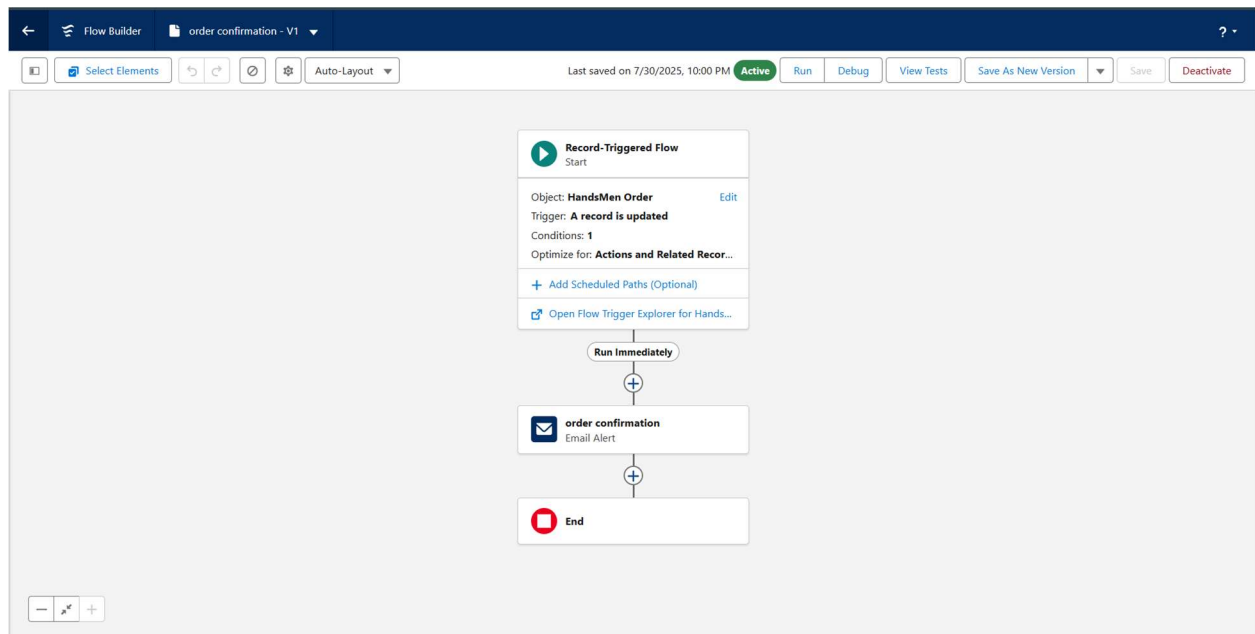
Fig 3: Loyalty Status Update Email
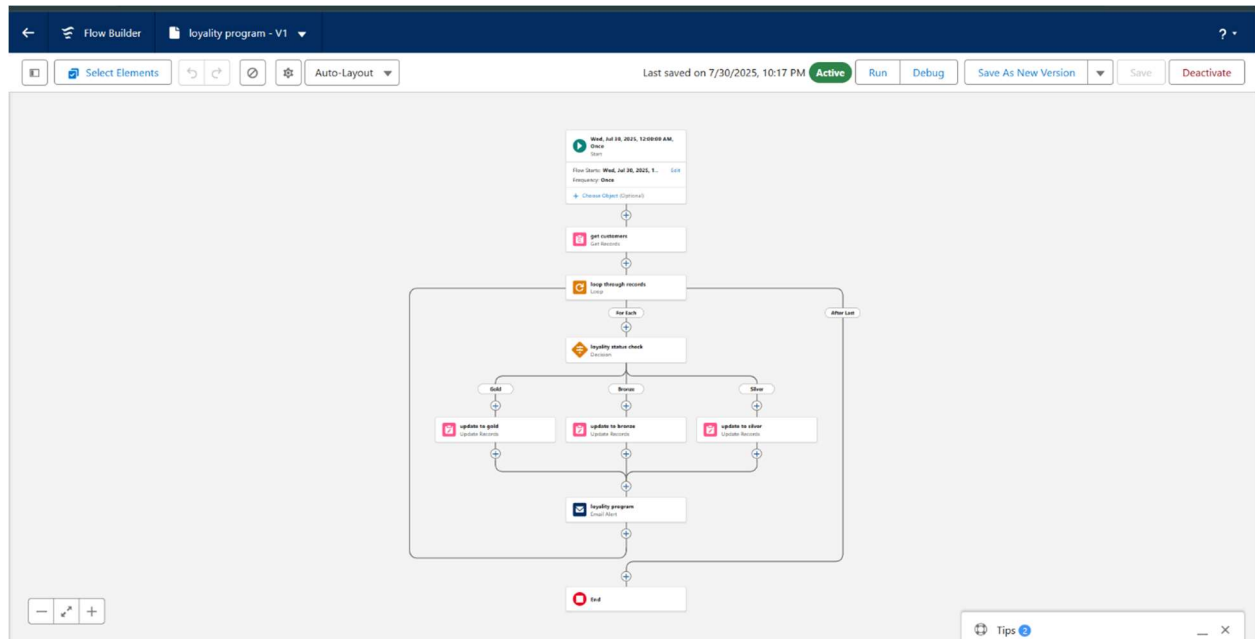

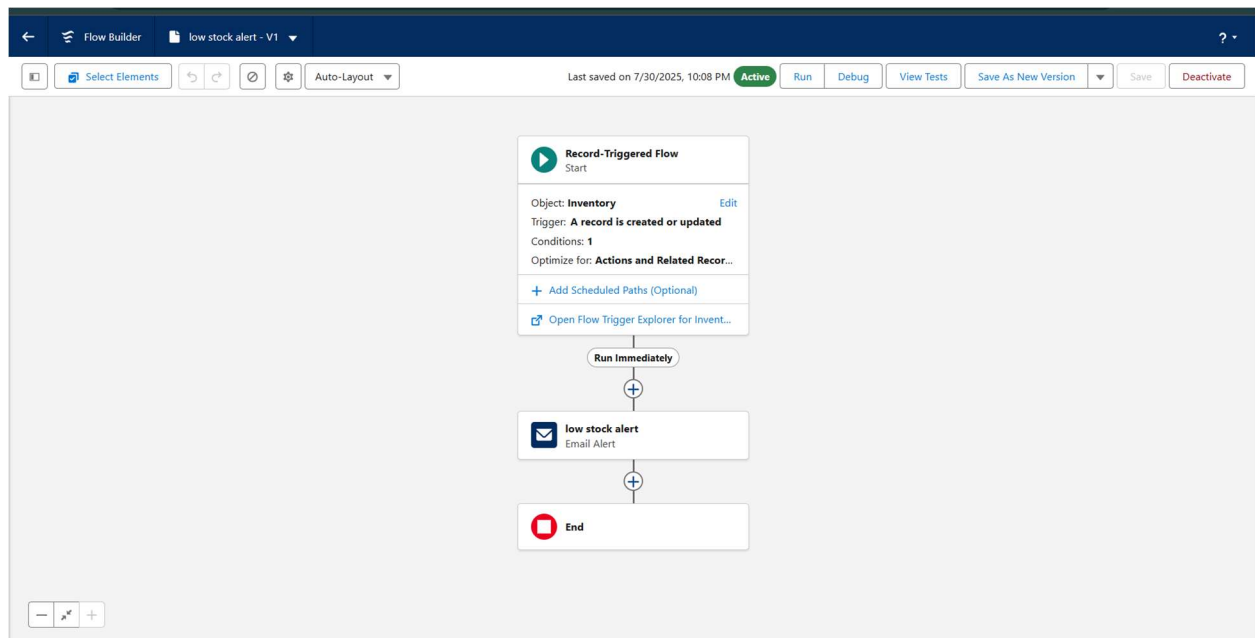**Fig 4: Order Confirmation Flow**

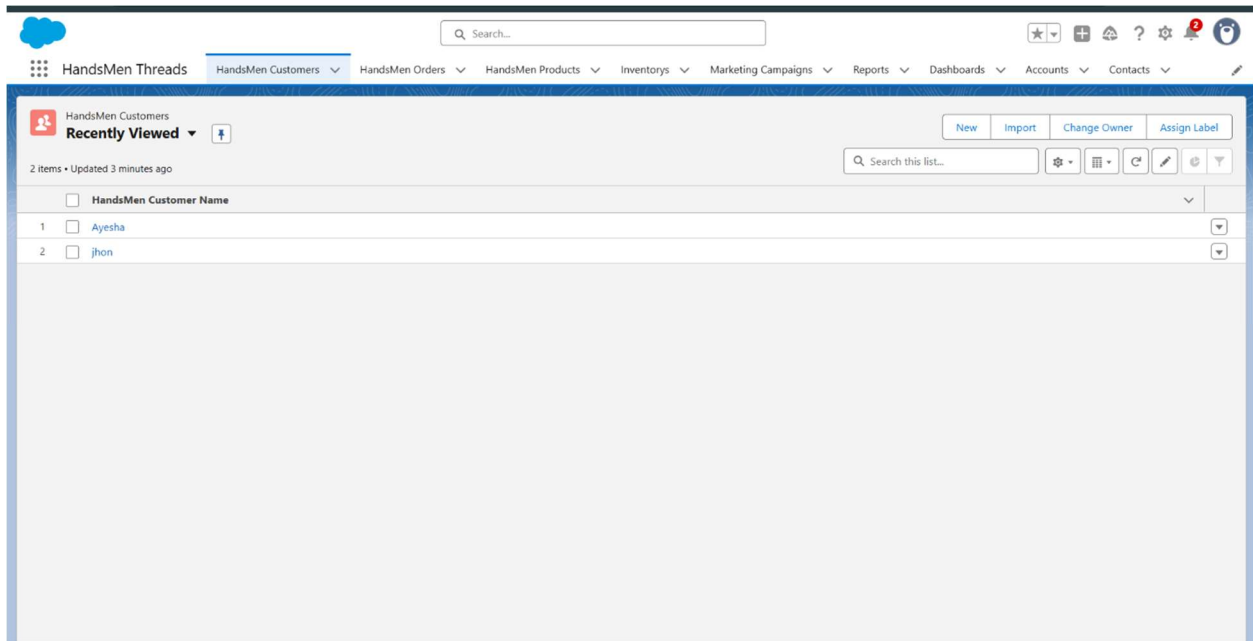**Fig 5: Loyalty Program Flow**

Fig 6: Low Stock Alert Flow
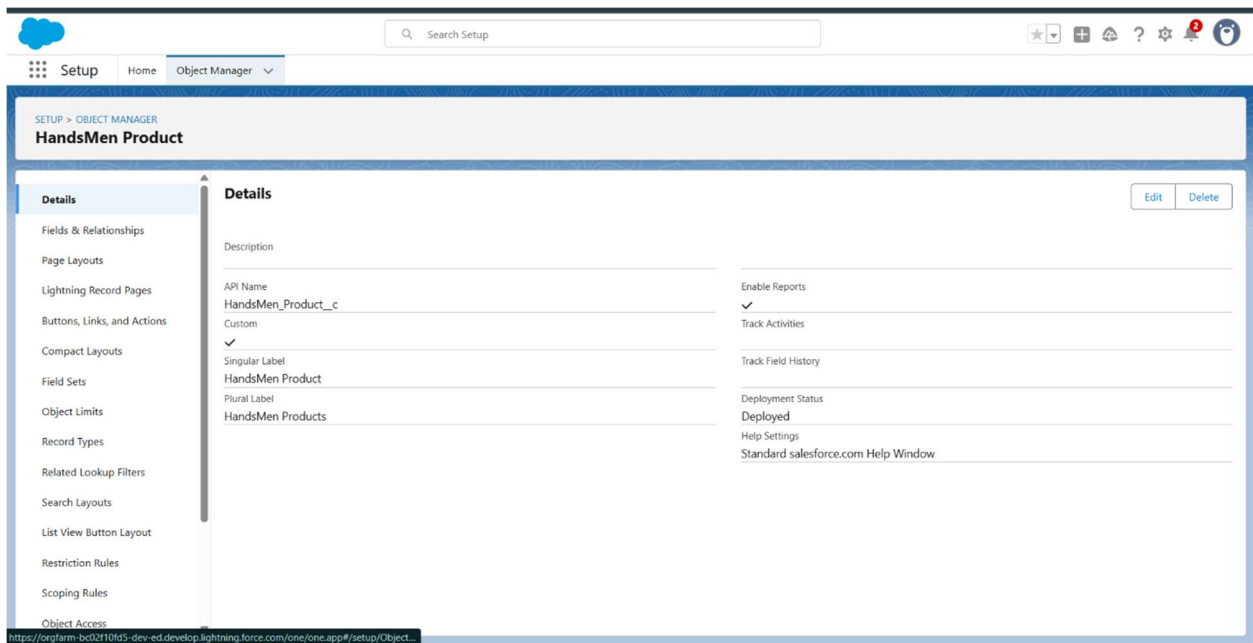
Fig 7: Handsmen Threads

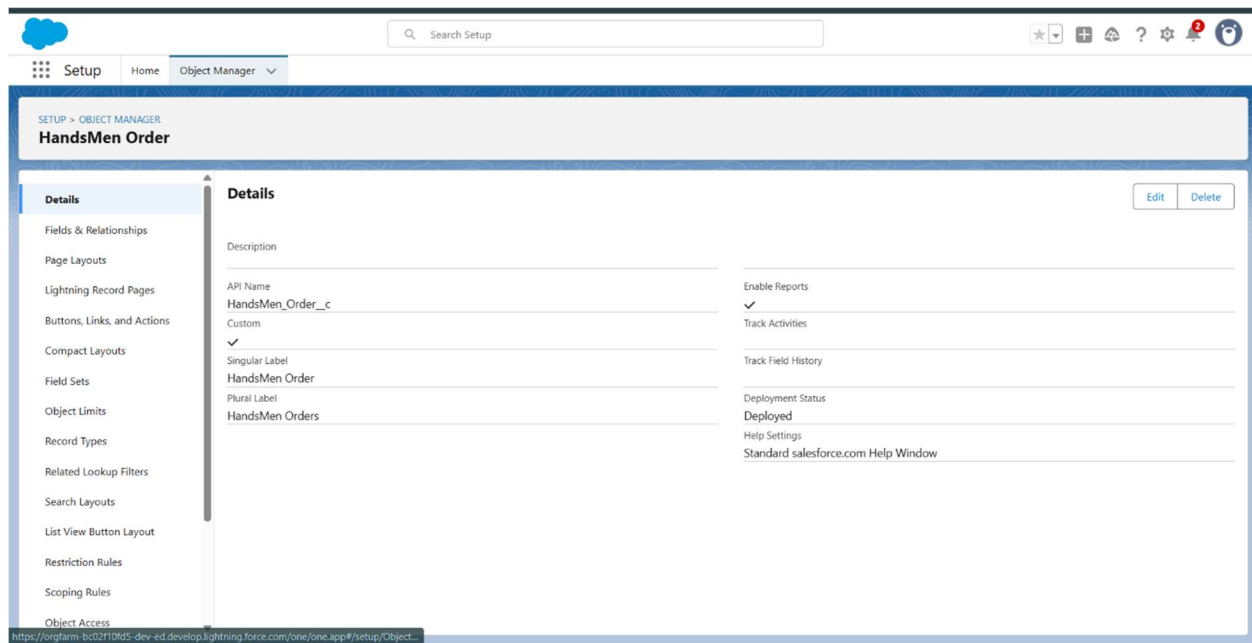**Fig 8: Handsmen Product Object**

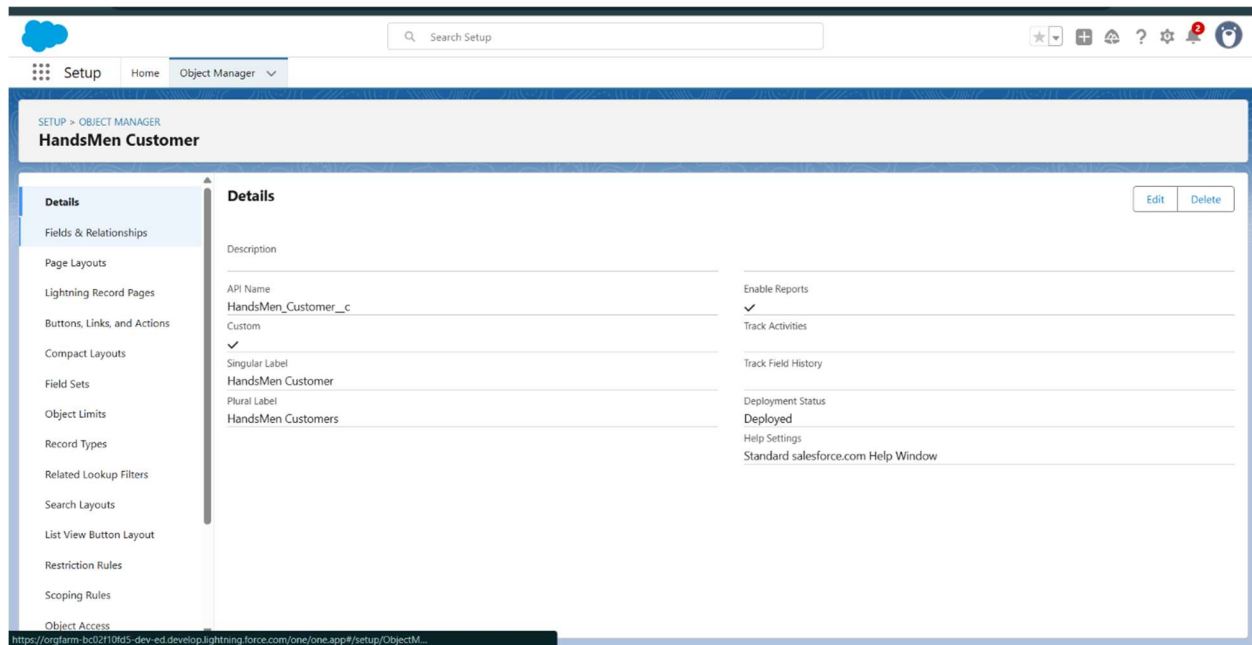**Fig 9: Handsmen Order Object**

Fig 10: Handsmen Product Object

CONCLUSION

The **Handsman Threads Salesforce CRM Project** stands as a comprehensive demonstration of how modern cloud technology can elevate a traditional industry like bespoke men's tailoring. From digitizing customer interactions to automating critical backend operations, every component of this solution was thoughtfully designed to solve real-world business problems while enhancing customer satisfaction.

Through the implementation of custom objects, validation rules, Apex triggers, and both record-triggered and scheduled Flows, the CRM application ensures seamless execution of day-to-day activities. Customers receive timely updates, inventory managers stay informed, and business leaders gain visibility into performance metrics — all within a unified platform.

The project doesn't just serve the current operational needs but is also **scalable for future growth**. For example:

- More loyalty tiers or rewards programs can be easily added.

- SMS integration can extend customer notifications beyond email.

- Reports can evolve into predictive analytics dashboards.

- Integration with eCommerce platforms or point-of-sale systems can make the CRM a fully omnichannel experience.

From a technical perspective, the project is a showcase of best practices in Salesforce development, using both declarative and programmatic tools effectively. Error handling, automation, user interface design, and performance considerations were all addressed, resulting in a well-rounded and professional-grade CRM system.

Moreover, the CRM platform fosters **data-driven decision-making**, ensures **process standardization**, and promotes a **customer-first business culture**, which are essential for any brand aspiring to establish itself in a competitive market.

In conclusion, **Handsman Threads CRM** is not just a project; it is a digital transformation blueprint for any retail business seeking to evolve from traditional operations to intelligent automation and customer-centric innovation. It proves that with the right tools and thoughtful execution, even a small tailoring business can achieve enterprise-level efficiency and engagement.