

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

ABSTRACT

The HandsMen Threads CRM system is a comprehensive, Salesforce-based solution designed for a premium men's fashion brand. The project aims to streamline business operations such as customer management, order tracking, inventory control, marketing, reporting, and customer loyalty programs. Through a combination of automation, analytics, and clean interface design, the HandsMen Threads app enhances operational efficiency while ensuring a personalized and engaging experience for every customer.

This CRM application was developed during a Salesforce Virtual Internship, showcasing the power of custom objects, flows, and Apex triggers within the Salesforce ecosystem.

Objectives of the Project

- To build a fully functional CRM system tailored for a men's fashion retail brand.
- To use Salesforce tools for automating routine business processes like order confirmation and stock monitoring.
- To enable effective marketing and customer engagement through flows and campaigns.
- To apply custom development and configuration such as custom objects, custom apps, Apex triggers, and flows.
- To improve user decision-making via real-time dashboards and reports.

Technology Description

The project is built entirely within the Salesforce CRM platform using the following features and technologies:

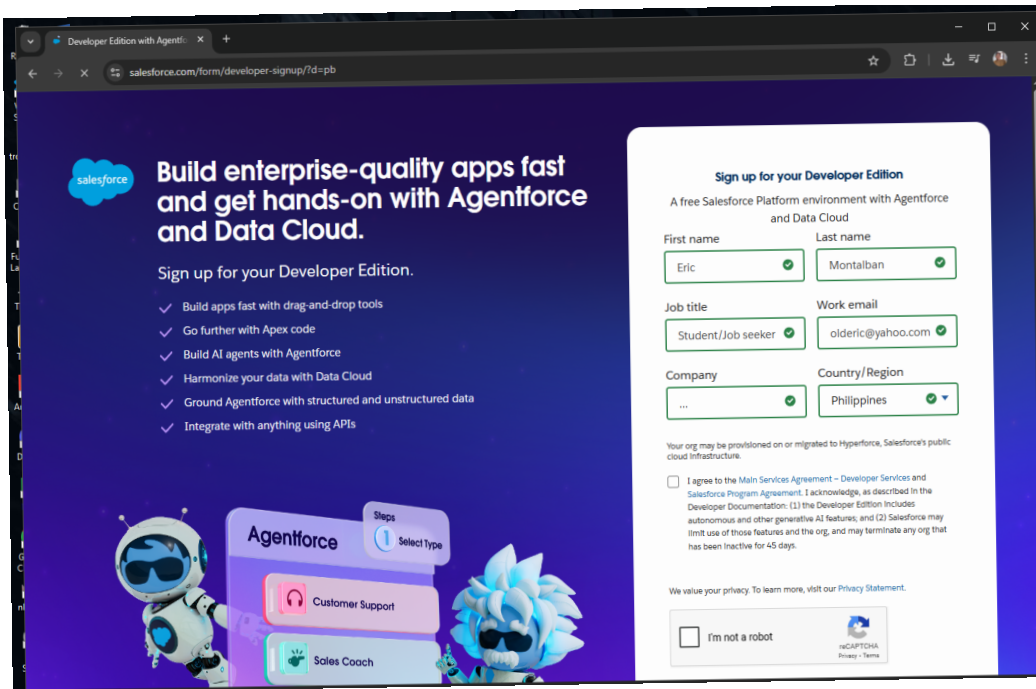
- **Custom App:** A fully customized app named HandsMen Threads that includes all the major CRM tabs.
- **Custom Objects:**
 - HandsMen Customers
 - HandsMen Orders
 - HandsMen Products
 - Inventories
- **Standard Objects Used:**
 - Accounts
 - Contacts
 - Campaigns
 - Reports
 - Dashboards
- **Automation Tools:**
 - Flow Builder
 - Order Confirmation Flow
 - Low Stock Alert Flow
 - Loyalty Program Flow
- **Apex Triggers:**
 - OrderTotalTrigger (calculates total order amount)
 - StockDeductionTrigger (deducts inventory automatically)
- **Profiles & Permissions:**
 - Configured different profiles for admin and users to control access to various tabs.
- **Marketing Campaign Management:**
 - Campaign object configured to manage promotional activities.
- **Reports & Dashboards:**
 - Visual summaries of sales trends, customer activity, inventory levels, and loyalty program participation.

IV. Detailed Explanation of Project Phases

Phase 1: Salesforce Developer Org Setup

A Salesforce Developer Org was created using <https://developer.salesforce.com/signup>

Account verification and password configuration were completed.



Phase 2: Custom Object Creation

Five custom objects were created:

HandsMen Customers

HandsMen Orders

HandsMen Products

Inventories

Loyalty Tiers

Steps followed:

Navigation to: Setup > Object Manager > Create > Custom Object

Fields and relationships were configured for each object.

Phase 3: Creating the Lightning App

A Lightning App named *HandsMen Threads* was created.

Tabs included in the app:

- HandsMen Customers
- HandsMen Orders
- HandsMen Products
- Inventories
- Marketing Campaigns
- Reports
- Dashboards
- Accounts
- Contacts

Phase 4: Validation Rules

Implemented validation rules to ensure data accuracy:

- Prevent zero or negative quantities in Orders.
- Validate required fields for customer records.

Phase 5: User Role and Profile Setup

- Created custom profiles for Admin, Manager, and Staff.
- Assigned tab-level and field-level permissions based on user roles.

Phase 6: User Creation

- Multiple users were created and assigned to specific roles.
- Profiles applied to control object access and visibility.

Phase 7: Email Template Alerts

Email templates were created for:

- Order Confirmation
- Low Stock Notification
- Loyalty Tier Upgrade

Phase 8: Flow Implementation

Built the following flows using Flow Builder:

- **Order Confirmation Flow** – Calculates total order value and sends email.
- **Low Stock Alert Flow** – Alerts when inventory falls below threshold.
- **Loyalty Program Flow** – Automatically upgrades loyalty tier.

Phase 9: Apex Trigger Development

Developed custom Apex Triggers:

- **OrderTotalTrigger** – Calculates order total during insert/update.
- **StockDeductionTrigger** – Deducts stock based on order quantity.

Phase 10: Project Explanation with Real-World Example

Demonstrated how the app works using a real-world scenario:

- A customer places an order.
- The system calculates the total, adjusts inventory, and confirms the order.
- If the product is low in stock, an alert is sent.
- When the customer reaches a loyalty milestone, they are upgraded and notified.

SCREENSHOT

FIG: HANDSME CUSTOMER TAB

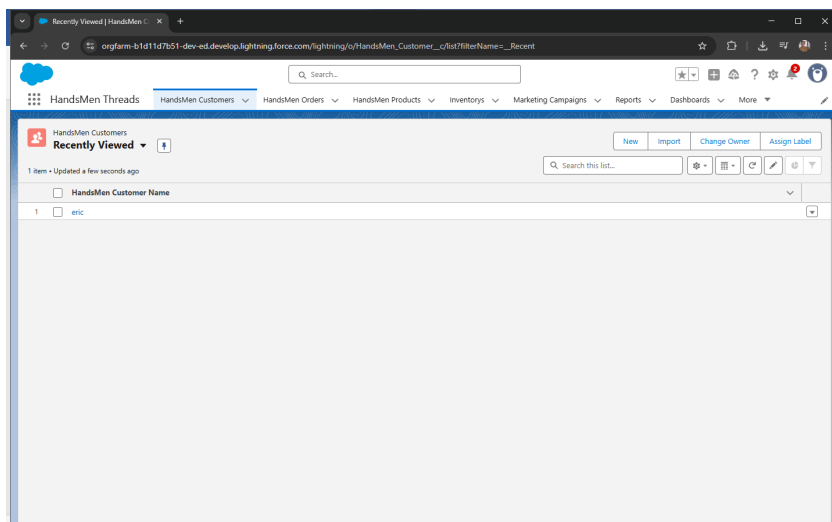


FIG: HANDSMEN ORDERS

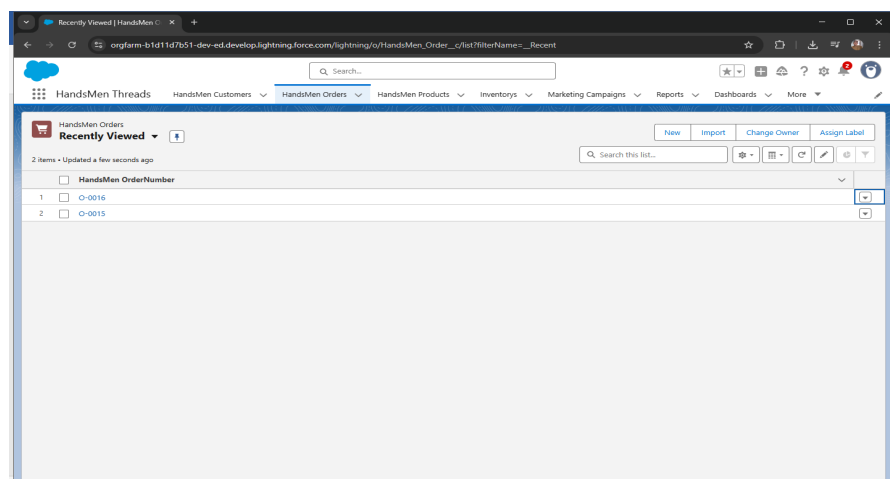


FIG: HANDSMEN PRODUCTS

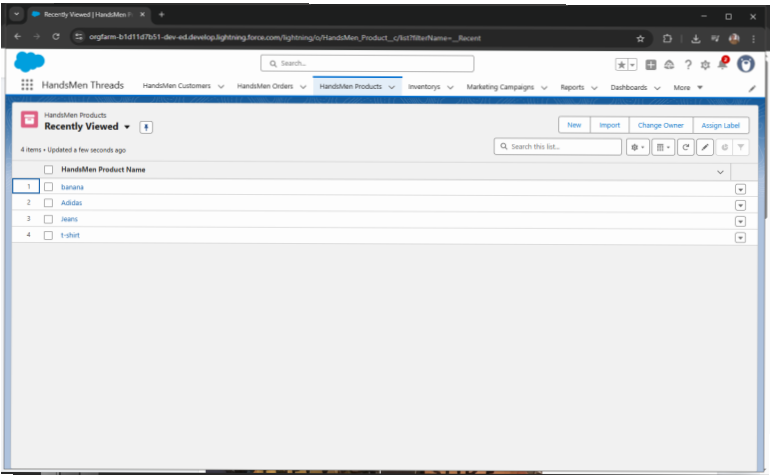
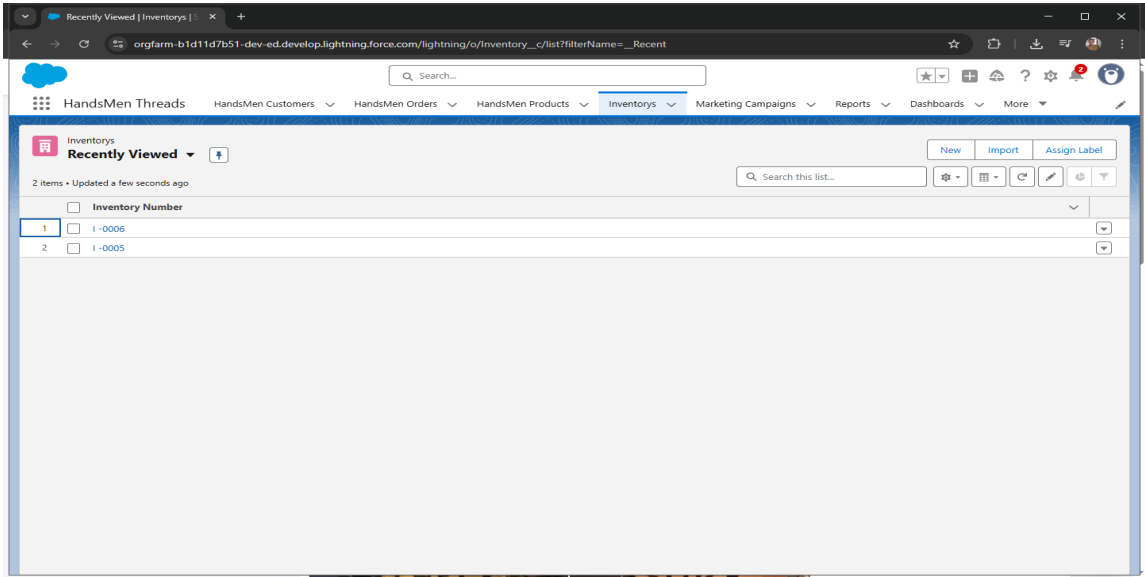


FIG: INVENTORY



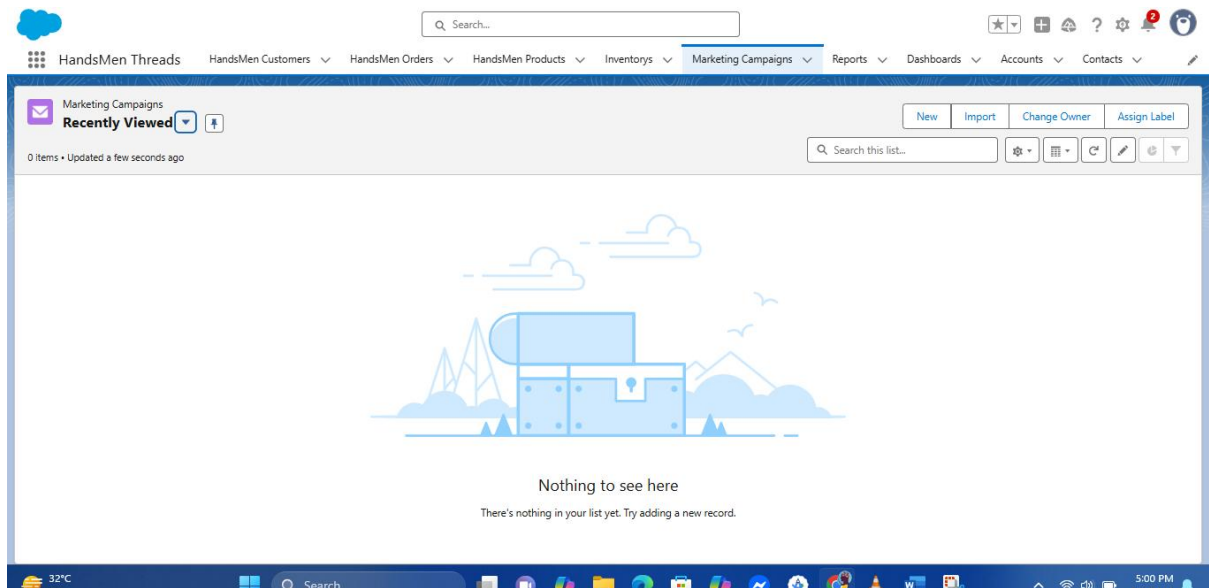


FIG: MARKETING CAMPAIGNS

Click to go back, hold to see history

Search...

HandsMen Threads HandsMen Customers HandsMen Orders HandsMen Products Inventories Marketing Campaigns Reports Dashboards Accounts Contacts

Reports

All Reports

Search all reports... New Report New Folder

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Exercise Completion by Days to Complete	Analyze an exercise's completion status based on average days to complete.	Enablement Dashboard Reports Summer '24	Automated Process	7/27/2025, 5:12 AM	
Created by Me	Exercise Completion by Days to Complete	Analyze an exercise's completion status based on average days to complete.	Enablement Dashboard Reports Spring '24	Automated Process	7/27/2025, 5:12 AM	
Private Reports	Exercise Completion by User	Analyze how long users are spending on an exercise and the amount of progress they're making.	Enablement Dashboard Reports Summer '24	Automated Process	7/27/2025, 5:12 AM	
Public Reports	Exercise Completion by User	Analyze how long users are spending on an exercise and the amount of progress they're making.	Enablement Dashboard Reports Spring '24	Automated Process	7/27/2025, 5:12 AM	
All Reports	Exercise Completion Status	Analyze how long users take to complete an exercise and their completion percentage.	Enablement Dashboard Reports Spring '24	Automated Process	7/27/2025, 5:12 AM	
FOLDERS	Exercise Completion Status	Analyze how long users take to complete an exercise and their completion percentage.	Enablement Dashboard Reports Summer '24	Automated Process	7/27/2025, 5:12 AM	
All Folders	Exercise Completion Status by	Analyze an exercise's completion	Enablement Dashboard Reports	Automated Process	7/27/2025, 5:12 AM	
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						

32°C Search 5:01 PM

FIG: REPORTS

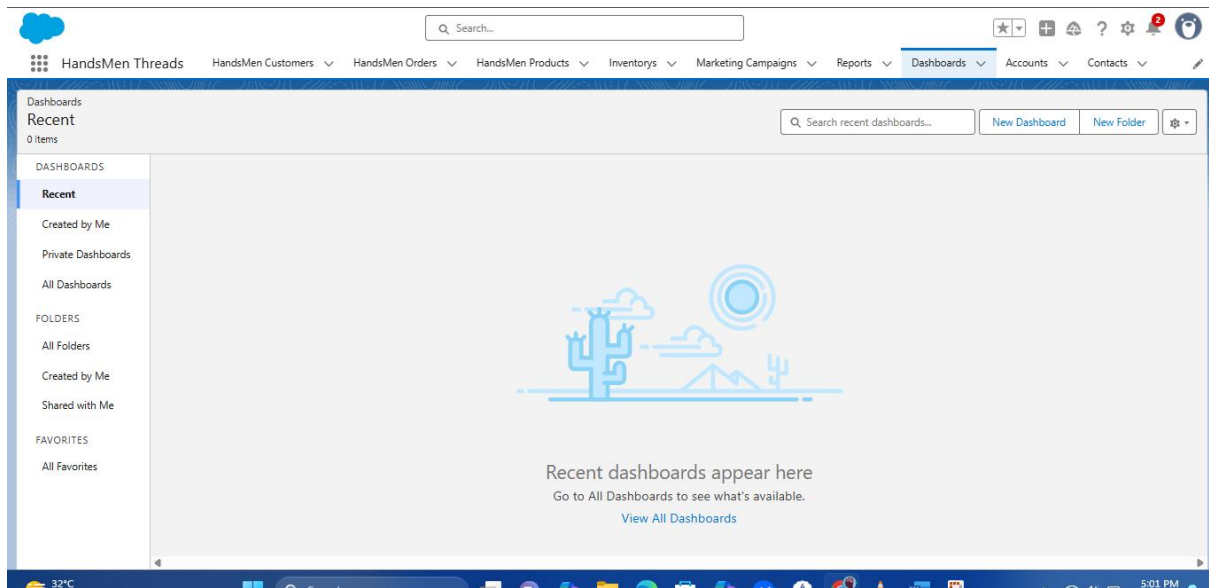


FIG: DASHBOARD

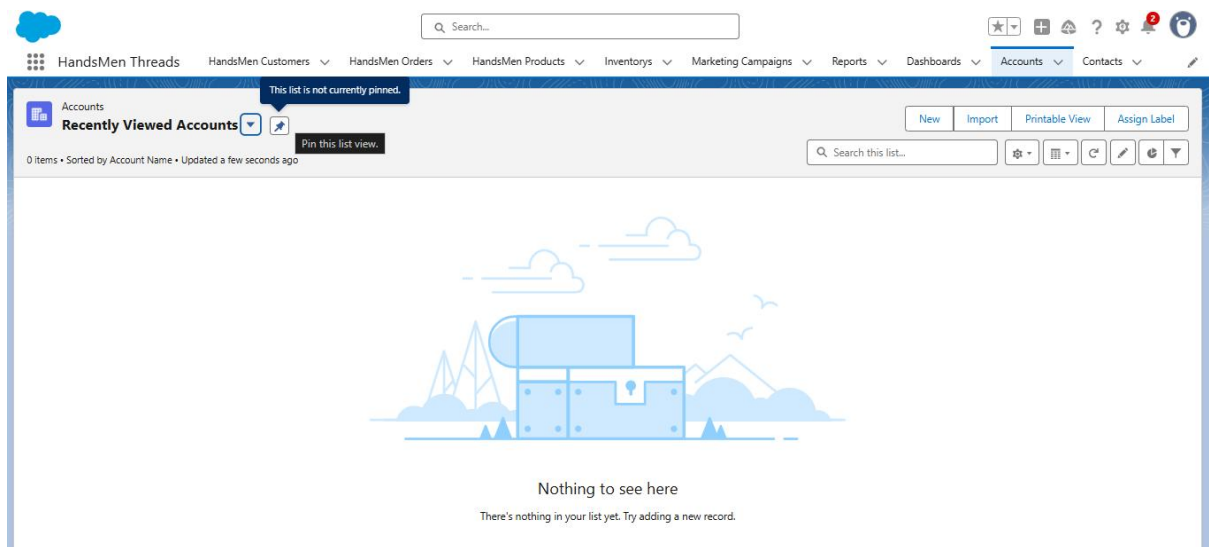


FIG: ACCOUNTS

Conclusion and Future Scope

HandsMen Threads: Elevating the Art of Sophistication in Men's FashionThe HandsMen Threads project demonstrates how Salesforce can be leveraged to build a powerful, scalable CRM tailored for the premium men's fashion industry. By integrating custom objects, automation flows, and Apex triggers, the platform delivers a seamless experience for both administrators and customers. This solution successfully automates core business operations such as order processing, inventory updates, and customer loyalty tracking—resulting in improved efficiency, accuracy, and customer satisfaction. The use of real-time dashboards and reports empowers the business to make data-driven decisions, while marketing tools ensure proactive customer engagement. Overall, the project reflects a strong alignment between technology and industry-specific needs, laying a solid foundation for future enhancements such as AI-based product recommendations, mobile accessibility, and advanced customer analytics. The experience of developing this system also strengthened the technical proficiency in Salesforce development and deepened the understanding of CRM strategies within a retail environment.
