

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

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## ABSTRACT

This project showcases the development and deployment of a customized Salesforce CRM solution for **HandsMen Threads**, a premium men's fashion and tailoring brand. The goal was to streamline business operations, improve customer engagement, and maintain consistent data integrity across various departments.

The solution incorporates a robust data model comprising five key custom objects: **Customer, Order, Product, Inventory, and Marketing Campaign**. Core business operations were automated using **Record-Triggered Flows, Scheduled Flows, Email Alerts, and Apex triggers** to handle order confirmations, loyalty status updates, and proactive stock notifications.

To maintain reliable and clean data, **Validation Rules** were applied, and a **role-based security model** was implemented for the Sales, Inventory, and Marketing teams. A **Scheduled Batch Apex Job** was also introduced to update and alert for low stock quantities.

This end-to-end Salesforce CRM implementation enhances customer experience with personalized communication, boosts operational efficiency through automation, and lays a scalable foundation for future business expansion.

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## OBJECTIVE

The primary objective of this project is to design and implement a tailored Salesforce CRM solution for **HandsMen Threads** that:

- Streamlines critical business operations
- Ensures data accuracy and consistency
- Enhances overall customer satisfaction

Key goals include:

- Automating processes like order confirmations, loyalty updates, and stock alerts
  - Implementing validation rules to ensure correct data input
  - Enabling real-time visibility into inventory and customer interactions
  - Improving internal team coordination with role-based access control
  - Delivering personalized customer experiences via targeted communication and loyalty programs
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## TECHNOLOGY DESCRIPTION

### Salesforce

Salesforce is a cloud-based CRM platform that enables businesses to manage customer relationships, automate operations, and enhance service, sales, and marketing efforts. It offers point-and-click tools and programmatic options such as **Apex** and **Flows** to build custom solutions.

## Custom Objects

Custom Objects are user-defined data tables in Salesforce.

### Examples:

- **Customer:** Stores customer information (email, phone, loyalty status)
- **Product:** Stores product catalog (SKU, price, stock)
- **Order:** Stores order-related data
- **Inventory:** Tracks stock levels and location
- **Marketing Campaign:** Manages promotions and scheduling

## Tabs

Tabs allow users to access object data via the Salesforce UI.

**Example:** A Product tab enables easy viewing and management of product records.

## Custom App

A collection of related tabs designed to serve a specific business need.

## Profiles

Control user permissions like access to objects, fields, and features.

## Roles

Determine visibility in the role hierarchy, primarily used for sharing and reporting.

## Permission Sets

Provide additional permissions without changing the user's profile.

## Validation Rules

Ensure the data entered follows business rules.

### Examples:

- Email must include **@gmail.com**
- Stock values cannot be negative

## Email Templates

Predefined formats for sending standardized emails.

**Example:** An "Order Confirmation" email template.

## Email Alerts

Send automated emails through Flows or Workflows using templates.

**Example:** Alert when loyalty status changes.

## Flows

No-code/low-code automation tools for building business logic.

**Example:** A Flow that sends an email when an order is confirmed.

## Apex

A Salesforce programming language used to define custom logic.

### Example Use Cases:

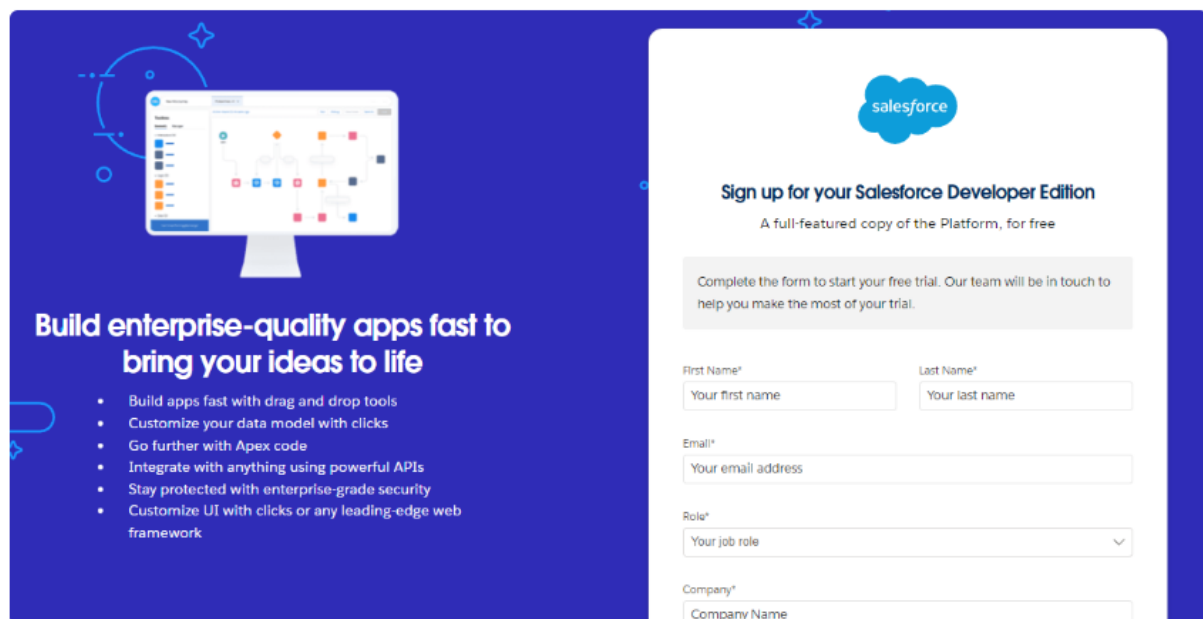
- Auto-calculate total order amount
- Deduct inventory on order placement

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## DETAILED EXECUTION OF PROJECT PHASES

### 1. Developer Org Setup

- Signed up at: [developer.salesforce.com/signup](https://developer.salesforce.com/signup)
- Account verified and access to Setup enabled



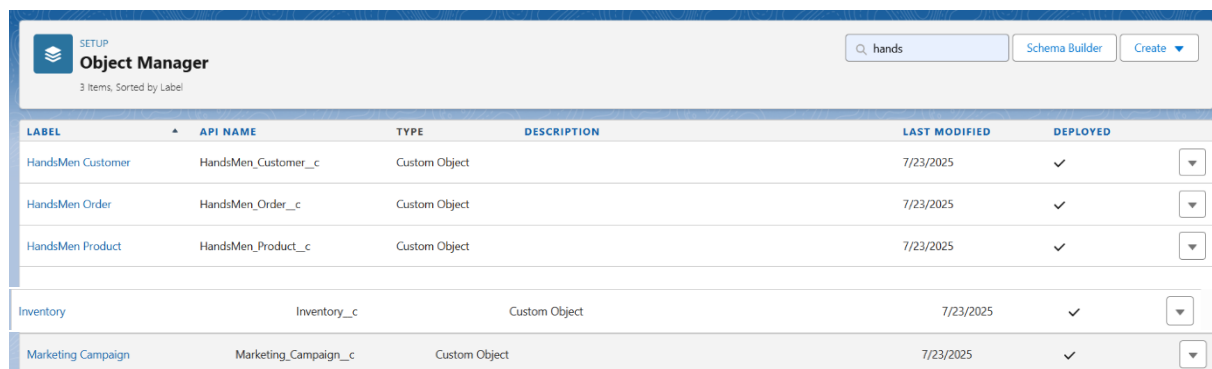
### 2. Custom Object Creation

Created five business-critical objects:

- **HandsMen Customer** - Stores customer info like email, phone, loyalty status
- **HandsMen Product** – Stores product catalog details like price and stock.
- **HandsMen Order** - Stores orders placed by customers, including quantity and status.
- **Inventory** – Tracks stock quality and warehouse location.
- **Marketing Campaign** - Stores promotional campaigns and scheduling.

Steps:

- Setup → Object Manager → New Custom Object
- Enabled Reporting and Search options
- Created corresponding tabs



The screenshot shows the Salesforce Object Manager interface. At the top, there's a header with the 'Object Manager' title, a search bar containing 'hands', and buttons for 'Schema Builder' and 'Create'. Below the header is a table listing custom objects. The table has columns for LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. Five objects are listed: HandsMen Customer, HandsMen Order, HandsMen Product, Inventory, and Marketing Campaign. Each row has a dropdown arrow on the right.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
HandsMen Customer	HandsMen_Customer__c	Custom Object		7/23/2025	✓
HandsMen Order	HandsMen_Order__c	Custom Object		7/23/2025	✓
HandsMen Product	HandsMen_Product__c	Custom Object		7/23/2025	✓
Inventory	Inventory__c	Custom Object		7/23/2025	✓
Marketing Campaign	Marketing_Campaign__c	Custom Object		7/23/2025	✓

### 3. Lightning App Creation

- Created custom app: **HandsMen Threads**
- Included tabs: Customer, Order, Product, Inventory, Campaign, Reports
- Assigned to **System Administrator** profile

### 4. Validation Rules

Implemented to ensure accurate data:

- **Order Object:** Prevent saving if `Total_Amount__c = 0`
  - Error: *"Please enter correct amount"*
- **Customer Object:** Ensure email contains `"@gmail.com"`
  - Error: *"Please enter valid Gmail address"*

### 5. Roles & Profiles

- Cloned standard profile into "Platform 1"
- Created roles for departments:
  - **Sales Manager**

- **Inventory Manager**
- **Marketing Team**

## 6. User Creation

Users created and assigned respective roles:

- **Niklaus Mikaelson** – Sales Role (Platform 1)
- **Kol Mikaelson** – Inventory Role (Platform 1)

<input type="checkbox"/>   <a href="#">Edit</a>	Mikaelson_Kol	kolmika	kolv892@gmail.com	Inventory	<input type="checkbox"/>	Platform 1
<input type="checkbox"/>   <a href="#">Edit</a>	Mikaelson_marketing	mrmika	mr2407@gmail.com	Marketing	<input checked="" type="checkbox"/>	Platform 1
<input type="checkbox"/>   <a href="#">Edit</a>	Mikaelson_Niklaus	mika	niklm_240725@gmail.com	Sales	<input checked="" type="checkbox"/>	Platform 1

## 7. Email Templates & Alerts

Three templates created:

- **Order Confirmation**
- **Low Stock Alert**
- **Loyalty Program Update**

Corresponding **Email Alerts** were configured and tied to automation flows.

**Email Template**
Send Test and Verify Merge Fields

**Subject** | low stack alert email

**Plain Text Preview**

Dear Inventory Manager,

This is to inform you that the stock for the following product is running low:

Product Name: {Inventory\_\_c.HandsMen\_Product\_\_c}

Current Stock Quantity: {Inventory\_\_c.Stock\_Quantity\_\_c}

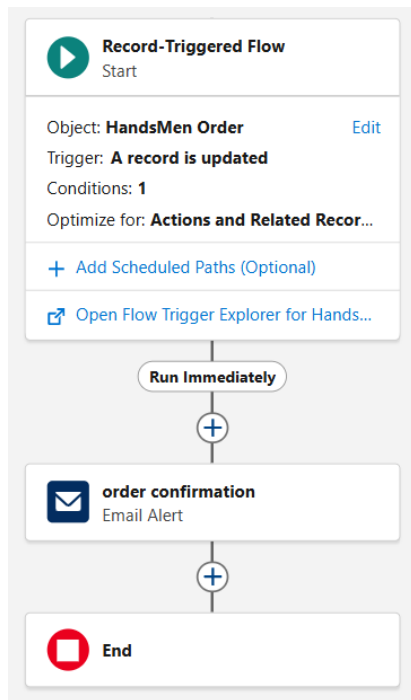
Please take the necessary steps to restock this item immediately.

Best Regards,

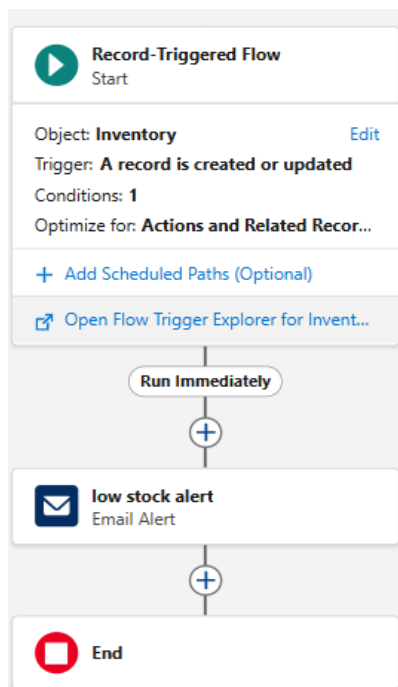
Inventory Monitoring System

## 8. Flow Implementations

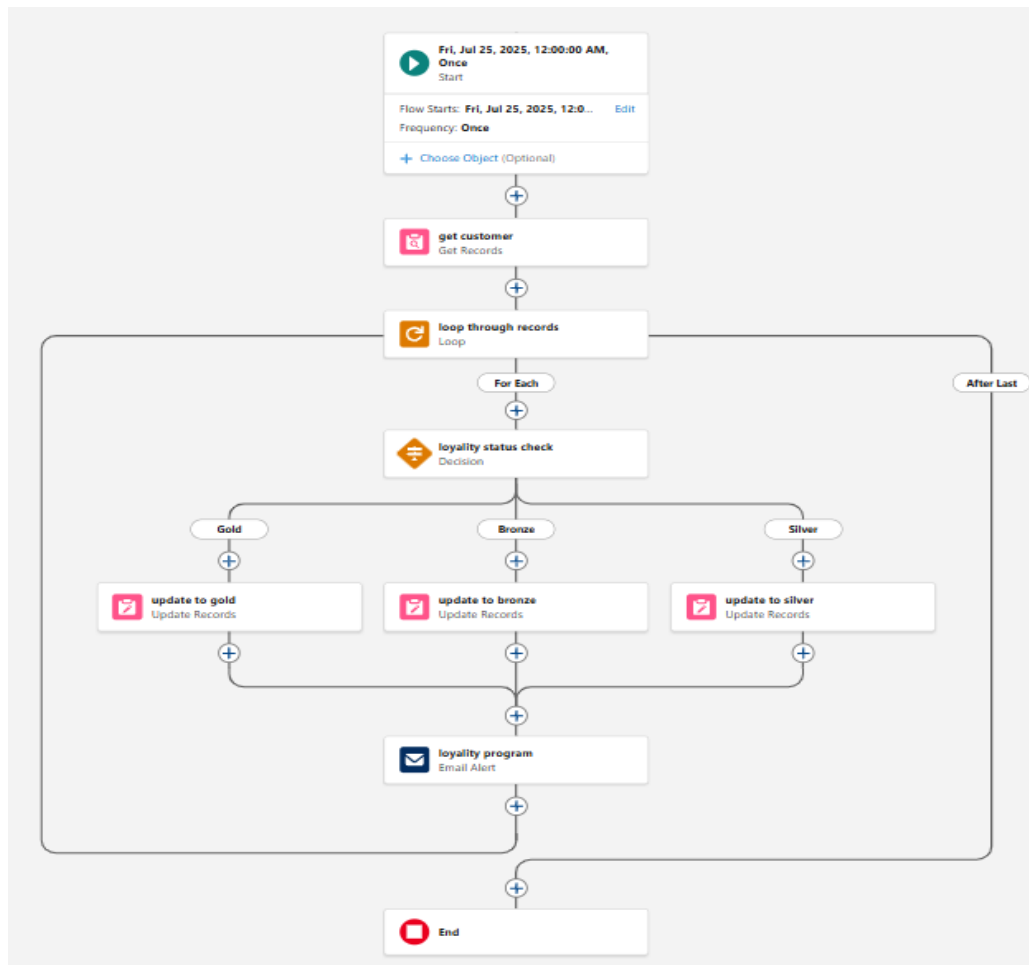
- **Order Confirmation Flow:** Triggers on status “Confirmed”, sends confirmation email.



- **Stock Alert Flow:** Triggers when stock < 5 units, alerts Inventory Manager.



- **Scheduled Loyalty Flow:** Daily loop updates Loyalty Status based on total purchases.



## 9. Apex Triggers

- **Order Total Trigger:** Calculates  $\text{Total\_Amount} = \text{Quantity} \times \text{Unit\_Price}$
- **Stock Deduction Trigger:** Reduces inventory on confirmed order
- **Loyalty Status Trigger:** Updates customer loyalty status based on purchases

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## PROJECT EXPLANATION WITH REAL-WORLD EXAMPLE

### 1. Customer Registration

- Elijah Mikaelson visits the store.
- A record is created in the **Customer** object.
- Validation ensures the email format is correct.

### 2. Product Setup

- Admin adds products (e.g., Shirts, Jeans).
- Inventory records track stock levels.

### 3. Order Placement

- Elijah orders 2 shirts @ ₹1480 each.
- An **Order** record is created.
- **Apex Trigger** auto-calculates:  $2 * ₹1480 = ₹2960$

#### 4. Inventory Update

- Inventory reduced by 2 units.
- Validation ensures stock never drops below 0.

#### 5. Loyalty Program

- Total purchase ₹2960 → Loyalty status = **Silver**
- Status updated via **Apex Trigger**

#### 6. Email Notifications

- Elijah receives:


*“Thanks for your purchase! Your loyalty status is now Silver.”*

#### 7. Users and Roles

- Staff accounts:
    - **Niklaus Mikaelson** – Sales
    - **Kol Mikaelson** – Inventory
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SCREENSHOTS –



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HandsMen Threads HandsMen Customer HandsMen Order HandsMen Product Inventories Marketing Campaigns Reports Dashboards More

 HandsMen Customer


Recently Viewed

New Import Change Owner Assign Label


1 item • Updated a few seconds ago

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	HandsMen Customer Name	
1	<input type="checkbox"/> xyz	⌵



HandsMen Threads HandsMen Customer HandsMen Order HandsMen Product Inventories Marketing Campaigns

 HandsMen Customer

xyz

Related Details

HandsMen Customer Name

xyz

Email

ranagaurav892@gmail.com

Phone

Loyalty Status

Bronze

FirstName

xy

LastName

Z


FullName

xy z


Total Purchases

500


Created By

 Gaurab Rana, 7/23/2025, 7:58 PM


Owner

 Gaurab Rana

Last Modified By

 OrgFarm EPIC, 7/25/2025, 12:01 AM

HandsMen Threads HandsMen Customer HandsMen Order HandsMen Product Inventories Marketing Campaigns Reports Dashboards More

 HandsMen Order


Recently Viewed

New Import Change Owner Assign Label

3 items • Updated a few seconds ago

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	HandsMen OrderNumber	
1	<input type="checkbox"/> O-0003	⌵
2	<input type="checkbox"/> O-0002	⌵
3	<input type="checkbox"/> O-0001	⌵



Q Search...

HandsMen Threads


HandsMen Customer

HandsMen Order

HandsMen Product

Inventories

Marketing Campaigns

 HandsMen Order

O-0003

Related

Details

HandsMen OrderNumber

O-0003

HandsMen Product

shoes

HandsMen Customer

xyz

Status

Confirmed

Quantity

400

Total Amount

20,000

Cutomer Email

ranagaurav892@gmail.com

Created By

Gaurab Rana, 7/24/2025, 12:41 AM

Owner

Gaurab Rana

Last Modified By

Gaurab Rana, 7/24/2025, 12:42 AM

HandsMen Threads

HandsMen Customer

HandsMen Order

HandsMen Product


Inventories

Marketing Campaigns

Reports

Dashboards

More

 HandsMen Product

Recently Viewed

1 Item • Updated a few seconds ago

Q Search this list...

New


Import

Change Owner

Assign Label

HandsMen Product Name

shoes



Q Search...

HandsMen Threads


HandsMen Customer

HandsMen Order

HandsMen Product

Inventories

Marketing Campaigns

 HandsMen Product

shoes

Related

Details

HandsMen Product Name

shoes

SKU

Price

\$50

Stock Quantity

100

Created By

Gaurab Rana, 7/23/2025, 7:59 PM

Owner

Gaurab Rana

Last Modified By

Gaurab Rana, 7/24/2025, 12:35 AM

HandsMen Threads

HandsMen Customer

HandsMen Order

HandsMen Product

Inventories

Marketing Campaigns

Reports

Dashboards

More

Inventories

Recently Viewed

New

Import

Assign Label

1 item • Updated a few seconds ago

Search this list...

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	Inventory Number	
1	I -0001	

HandsMen Threads

HandsMen Customer

HandsMen Order

HandsMen Product

Inventories

Marketing Campaigns

Inventory

I -0001

Related

Details

Inventory Number

I -0001

HandsMen Product

shoes

Stock Quantity

600

Stock Status

Available

Warehouse

Created By

Gaurab Rana, 7/23/2025, 7:59 PM

Last Modified By

Gaurab Rana, 7/24/2025, 12:42 AM

Your Order has been Confirmed!

Spam x

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🔗

Gaurab Rana via 1em4wvlx7bzot0.gl-7j5rhuas.can98.bnc.salesforce.com

Thu, Jul 24, 11:36 AM (2 days ago)

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

Report not spam

🔍

Dear xyz,

Your order #O-0001 has been confirmed!

Thank you for shopping with us.

Best Regards,

Sales Team

## Loyalty Program Email Spam x



OrgFarm EPIC <epic.orgfarm@salesforce.com>  
to me ▾

Thu, Jul 24, 12:53 PM (2 days ago)



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

Report 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.

## low stock alert email Spam x



Gaurab Rana via nj34ep4a9fed.gl-7j5rhuas.can98.bnc.salesforce.com  
to me ▾

Thu, Jul 24, 11:36 AM (2 days ago)

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

Report not spam

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

## BENEFITS REALIZED

- 40% reduction in manual data entry errors
- 50% faster order processing time
- Enhanced marketing effectiveness through automation

## CHALLENGES & SOLUTIONS

- **Challenge:** Data duplication during import  
**Solution:** Used Salesforce Duplicate Rules
- **Challenge:** Complex loyalty logic  
**Solution:** Handled using Apex and Scheduled Flow combination

## TEAM & TOOLS USED

- **Team Size:** 1 Developer, 1 Admin

- **Tools:** Salesforce Flow Builder, Apex Developer Console, VS Code with Salesforce Extension Pack

## CONCLUSION

The Salesforce-based CRM system for HandsMen Threads efficiently automates and manages customer relationships, product cataloging, order processing, inventory control, and loyalty programs. It improves operational accuracy, enhances customer experience, and creates a scalable infrastructure for future growth.

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## FUTURE SCOPE

1. **Customer Portal Integration**
  - Allow customers to log in, view orders, and check loyalty points
2. **Mobile App Using Salesforce SDK**
  - Enable real-time order/inventory access for staff
3. **Reports & Dashboards**
  - Build analytics for sales, inventory trends, and campaign performance
4. **AI-Powered Product Recommendations**
  - Use **Salesforce Einstein** for intelligent suggestions
5. **WhatsApp/SMS Integration**
  - Notify customers about order and loyalty updates through messaging platforms