

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

ABSTRACT

This project presents the implementation of a customized Salesforce CRM solution for HandsMen Threads, a premium men's fashion and tailoring brand. The objective was to streamline business operations, enhance customer engagement, and maintain data integrity across departments.

The solution involves designing a robust data model featuring five key custom objects: Customer, Order, Product, Inventory, and Marketing Campaign. Business processes were automated using Record-Triggered Flows, Scheduled Flows, Email Alerts, and Apex to handle order confirmations, loyalty status updates, and proactive stock alerts.

To ensure clean and reliable data, validation rules were established, and a role-based security model was implemented for the Sales, Inventory, and Marketing teams. The solution also includes a scheduled batch job using Apex to update low stock quantities.

This end-to-end CRM implementation improves customer experience through personalized communication, ensures operational efficiency with automation, and lays a scalable foundation for future business growth using the Salesforce Platform.

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.
- **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 targeted 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 tools 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 users 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:-

Profiles define 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 permissions to 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 customers or users.

Example:

- "Order Confirmation" template

Email Alerts:-

Email Alerts are actions in Flows or Workflow Rules that send emails using predefined templates.

Example: When a loyalty level changes, an email is sent to the customer.

Flows:-

Flows automate business logic without code. They can create, update, or send notifications.

Example:

- Flow triggers email alerts on new order

Apex:-

Apex is Salesforce's object-oriented programming language. It allows developers to write custom logic.

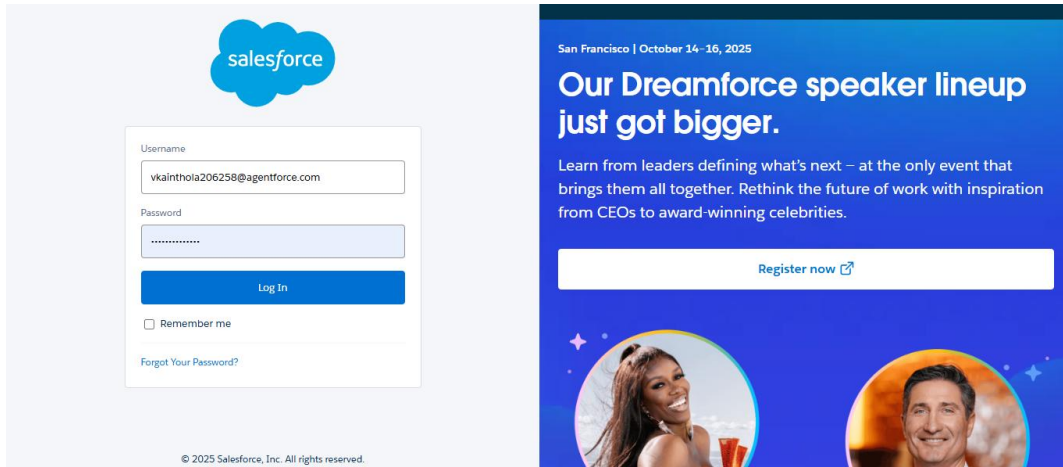
Example Triggers:

- Update Total_Amount__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 Salesforce Setup page.



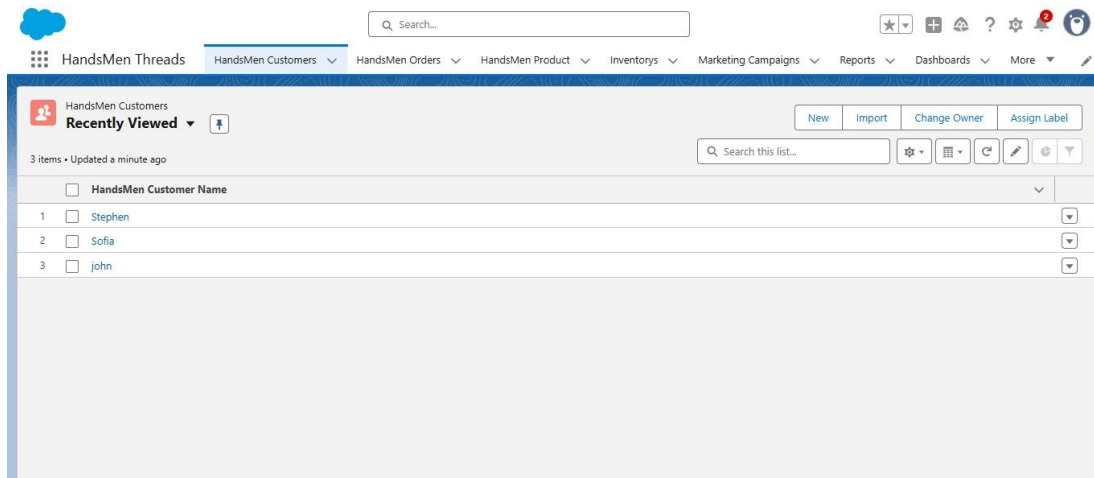
2. Custom Object Creation

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

Steps followed:

- Navigated to Setup → Object Manager → Create → Custom Object
- Provided label, name, and enabled reports/search
- Saved and created Tabs for each object



3. Creating the Lightning App

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

4. Validation Rules

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

- **Order Object:** Prevents saving if Total_Amount__c <= 0. Error: "Please Enter Correct Amount"
- **Customer Object:** Validates email contains @gmail.com. Error: "Please fill Correct Gmail".

The screenshot displays the 'HandsMen Customer' record for 'Stephen'. The record is shown in a table-like format with fields and their values. The fields include: HandsMen Customer Name (Stephen), Email (stephen@gmail.com), Phone, Loyalty Status, First Name (Stephen), Last Name (Macrev), Full Name (Stephen Macrev), Total_Purchases (500), Created By (Vaishnavi Kainthola, 7/21/2025, 3:00 AM), and Last Modified By (Vaishnavi Kainthola, 7/21/2025, 3:08 AM). The 'Owner' field is also visible, showing 'Vaishnavi Kainthola'.

5. User Role & 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 – Assigned the Sales role
- Kol Mikaelson – Assigned the Inventory role

These role-based assignments help enforce proper data access and process control within the system.

The screenshot shows the Salesforce 'Users' setup page for a user named Niklaus Mikaelson. The page has a blue header with a 'SETUP Users' button. Below the header, there's a navigation bar with links to various setup areas like Permission Set Assignments, Activation Required, etc. The main content area is titled 'User Detail' and contains a table with user information and a list of roles with checkboxes.

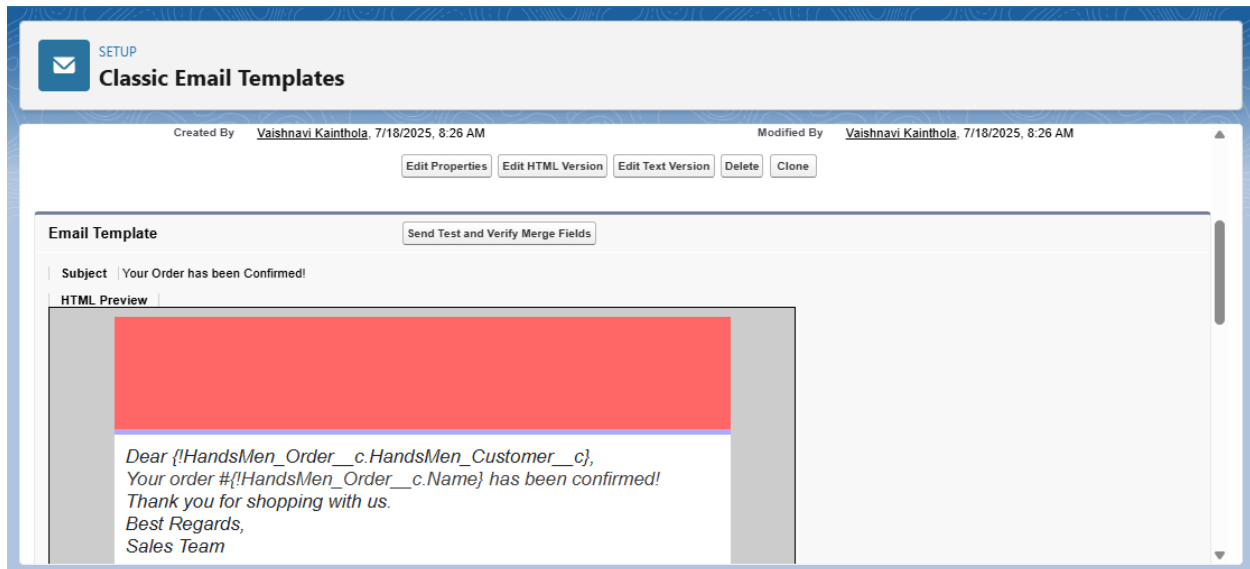
User Detail		Edit Sharing Reset Password Freeze View Summary	
Name	Niklaus Mikaelson	Role	Sales
Alias	nmika	User License	Salesforce
Email	vkainthola2003@gmail.com [Verify] [i]	Profile	Platform 1
Username	vkainthola1606@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User17528488585427235598 [i]	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	Site.com Publisher User	<input type="checkbox"/>

7. Email Template & 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

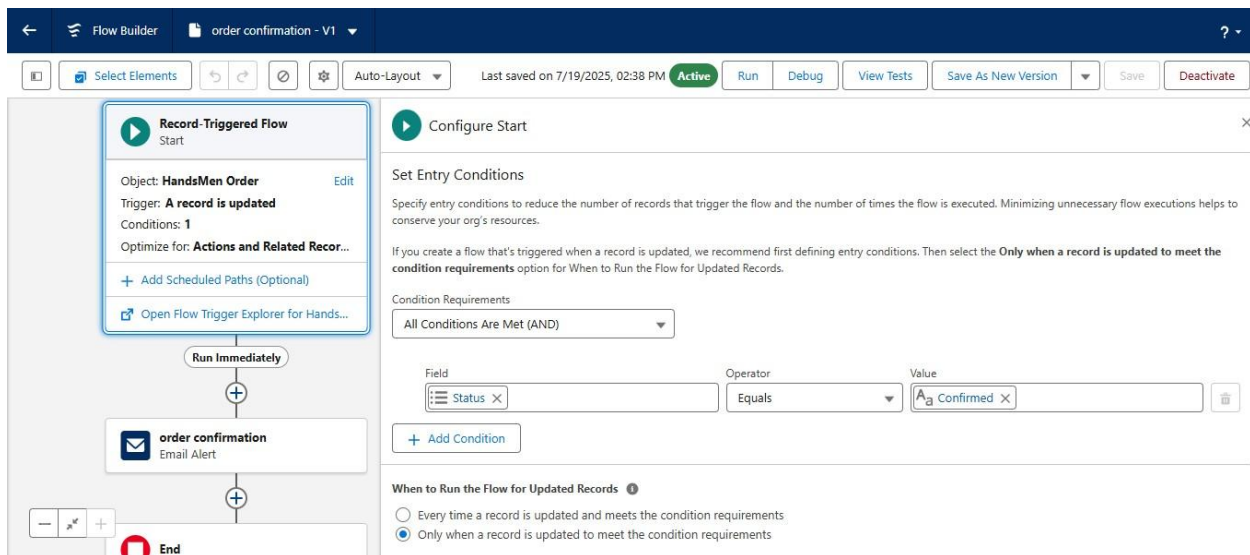
Corresponding Email Alerts were created using these templates and linked to automation flows.



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.

The screenshot shows the Flow Builder interface for a flow named "low stock alert - V1". The flow is configured with a "Record-Triggered Flow" trigger for the "Inventory" object, triggered when "A record is created or updated". The flow then proceeds through a "Run Immediately" step and an "Email Alert" step. The right panel, titled "Configure Start", shows the "Set Entry Conditions" section with a condition requirement of "All Conditions Are Met (AND)". A single condition is defined: "Stock Quantity" is "Less Than" 5. The "When to Run the Flow for Updated Records" section is set to "Every time a record is updated and meets the condition requirements".

c. Scheduled Flow: Loyalty Update

- Runs daily at midnight.
- Loops through customers and updates their Loyalty Status based on total purchases.

The screenshot shows the Flow Builder interface for a flow named "loyalty program - V1". The flow is configured with a "Sat, Jul 19, 2025, 12:00:00 AM, Once" trigger. It then proceeds through "get customers", "loop through records", and a "For Each" loop. Inside the loop is a "loyalty status check" decision step. The right panel, titled "Decision", shows the configuration for the "loyalty status check" decision. It has three outcomes: "Gold", "Bronze", and "Silver". The "Gold" outcome has a condition requirement of "All Conditions Are Met (AND)" and a resource condition of "...ugh records > Total_Purchases" greater than 1000.

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.

PROJECT EXPLANATION WITH REAL-WORLD EXAMPLE

Let's walk through it like a real customer interaction.

1. Customer Registration

- A customer, Elijah Mikaelson, visits the store or website.
- In Salesforce: A record is created in the Customer object with his name, phone, email, etc.
- Validation Rule: Ensures the email is valid (e.g., must contain @gmail.com).

2. Product Setup

- The admin adds products like Shirts, Jeans, etc., into the Product__c object.
- Each product has a price and other details.
- Inventory is also created to manage stock for these products.

3. Order Placement

- Elijah decides to buy 2 shirts (each ₹500). An order is placed.
- In Salesforce: A new Order record is created.
- Apex Trigger: Automatically calculates $\text{Total_Amount_c} = 2 \times 500 = ₹1000$.

4. Inventory Update As soon as the order is placed:

- Apex Trigger on Inventory: Reduces shirt stock by 2.
- Validation Rule: Ensures stock never goes below 0.

5. Loyalty Program

- Elijah now has a total purchase of ₹1000.
- A trigger on Customer checks his total purchases. **Based on the value:** < ₹500 → Bronze ₹500—₹1000 → Silver ₹1000 → Gold
- So, Elijah becomes a Silver member.

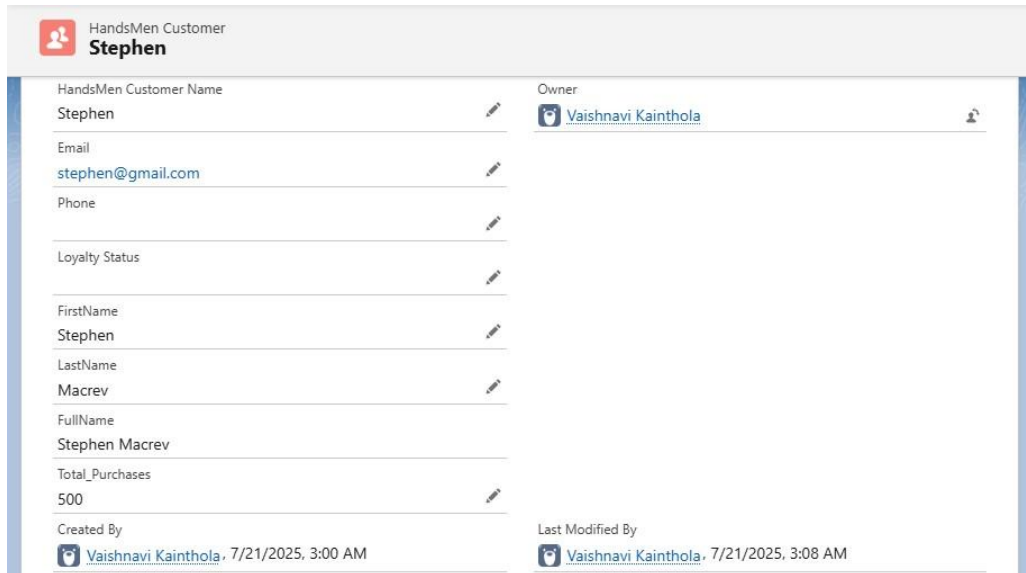
6. Email Notifications

- When a new order is placed or loyalty status is updated:
- Flow + Email Alert is triggered.
- Elijah gets an email: "Thanks for your purchase! Your loyalty status is now Silver."

7. Users and Roles Salesforce users like store staff are created:

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

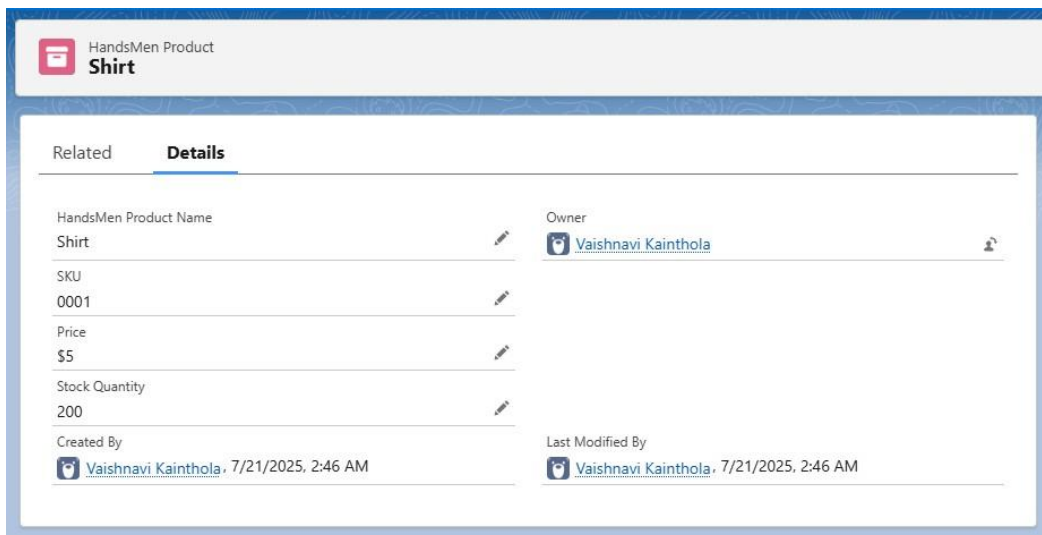
SCREENSHOTS



The screenshot shows the 'HandsMen Customer' record for 'Stephen'. The record is displayed in a table-like format with fields for personal and account information. The 'Owner' field is set to 'Vaishnavi Kainthola'. The 'Created By' and 'Last Modified By' fields are also set to 'Vaishnavi Kainthola' with timestamps from 7/21/2025.

Field	Value
HandsMen Customer Name	Stephen
Email	stephen@gmail.com
Phone	
Loyalty Status	
FirstName	Stephen
LastName	Macrev
FullName	Stephen Macrev
Total_Purchases	500
Created By	Vaishnavi Kainthola, 7/21/2025, 3:00 AM
Last Modified By	Vaishnavi Kainthola, 7/21/2025, 3:08 AM


a. Create new HandsMen Customer






The screenshot shows the 'HandsMen Product' record for 'Shirt'. The record is displayed in a table-like format with fields for product details. The 'Owner' field is set to 'Vaishnavi Kainthola'. The 'Created By' and 'Last Modified By' fields are also set to 'Vaishnavi Kainthola' with timestamps from 7/21/2025.


Field	Value
HandsMen Product Name	Shirt
SKU	0001
Price	\$5
Stock Quantity	200
Created By	Vaishnavi Kainthola, 7/21/2025, 2:46 AM
Last Modified By	Vaishnavi Kainthola, 7/21/2025, 2:46 AM

b. Create new HandsMen Product




HandsMen Order
O-0006

HandsMen OrderNumber	O-0006	Owner	 Vaishnavi Kainthola
HandsMen Product	T-shirt cloth		
HandsMen Customer	Stephen		
Status	Confirmed		
Quantity	20		
Total Amount	60		
Customer Email	vkainthola206@gmail.com		
Created By	 Vaishnavi Kainthola , 7/21/2025, 3:02 AM		
		Last Modified By	 Vaishnavi Kainthola , 7/21/2025, 3:03 AM

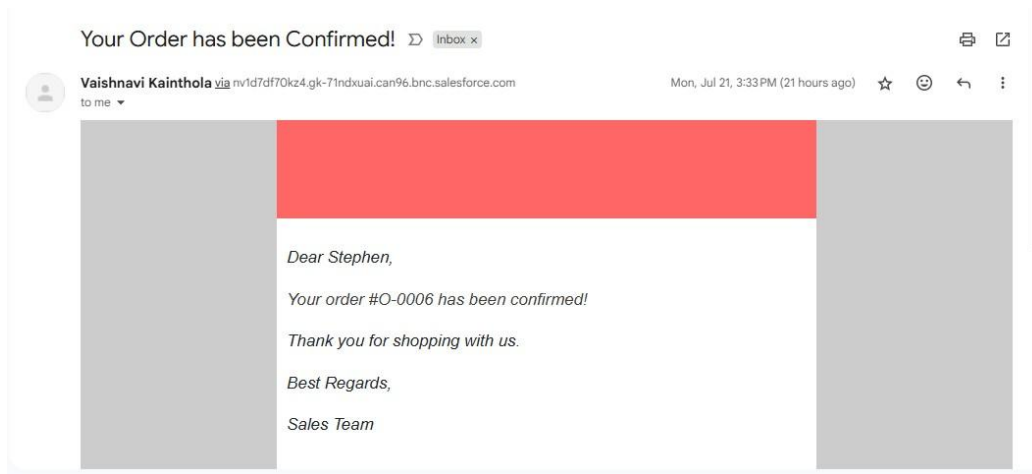
c. Create new HandsMen Order


Inventory
I -0002

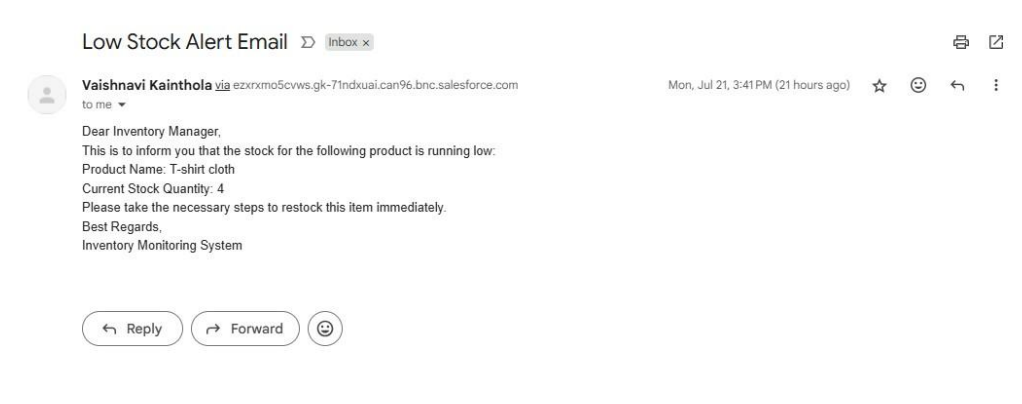
Related
Details

Inventory Number	I -0002
HandsMen Product	Shirt
Stock Quantity	200
Stock Status	Available
Warehouse	abc
Created By	 Vaishnavi Kainthola , 7/21/2025, 2:47 AM
	Last Modified By  Vaishnavi Kainthola , 7/21/2025, 2:47 AM

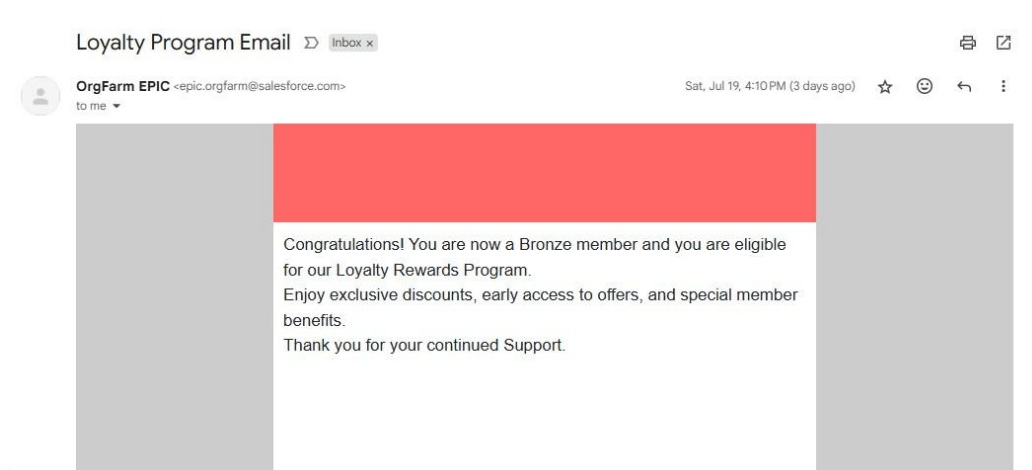
d. Create new HandsMen Inventory



e. Order Confirmation Email



f. Low Stock Alert Email



g. Loyalty Program Email

CONCLUSION

The HandsMen Threads CRM system built on Salesforce successfully streamlines key business processes like customer management, product cataloging, order processing, inventory tracking, and loyalty program automation. By leveraging Salesforce tools like Custom Objects, Flows, Validation Rules, Email Alerts, and Apex, the system ensures accurate data entry, real-time updates, and enhanced customer experience. Through automation and well-structured user roles, the platform minimizes manual errors, speeds up operations, and provides better insights into sales and stock.

Future Scope:-

1. Customer Portal Integration

- Build a Customer Community Portal where customers can log in, view orders, and track loyalty status.

2. Mobile App using Salesforce Mobile SDK

- Enable store staff to manage inventory and orders on the go using a mobile interface.

3. Reports & Dashboard

- Create detailed sales and inventory dashboards for management to monitor trends and performance in real-time.

4. AI-Powered Recommendations (Einstein)

- Use Salesforce Einstein to provide personalized product suggestions based on past purchases.

5. WhatsApp/SMS Integration

- Notify customers via WhatsApp or SMS about order confirmations and loyalty updates.