

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

## **ABSTRACT**

This project showcases the implementation of a customized Salesforce CRM solution tailored for HandsMen Threads, a premium men's fashion and tailoring brand. The primary goal was to streamline business processes, boost customer engagement, and uphold data accuracy across various departments.

The solution centers around a comprehensive data model built on five key custom objects: Customer, Order, Product, Inventory, and Marketing Campaign. Business automation was achieved through the use of Record-Triggered Flows, Scheduled Flows, Email Alerts, and Apex programming to manage critical tasks such as order confirmations, loyalty program updates, and timely stock notifications.

To maintain high data quality and enforce organizational security, validation rules were applied, and a role-based access model was set up for the Sales, Inventory, and Marketing teams. Additionally, an Apex-based scheduled batch job was developed to monitor and update low inventory levels proactively.

This end-to-end CRM implementation enhances the customer experience with targeted, personalized communication, increases operational efficiency through process automation, and provides a scalable foundation for future growth within the Salesforce ecosystem.

## **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.

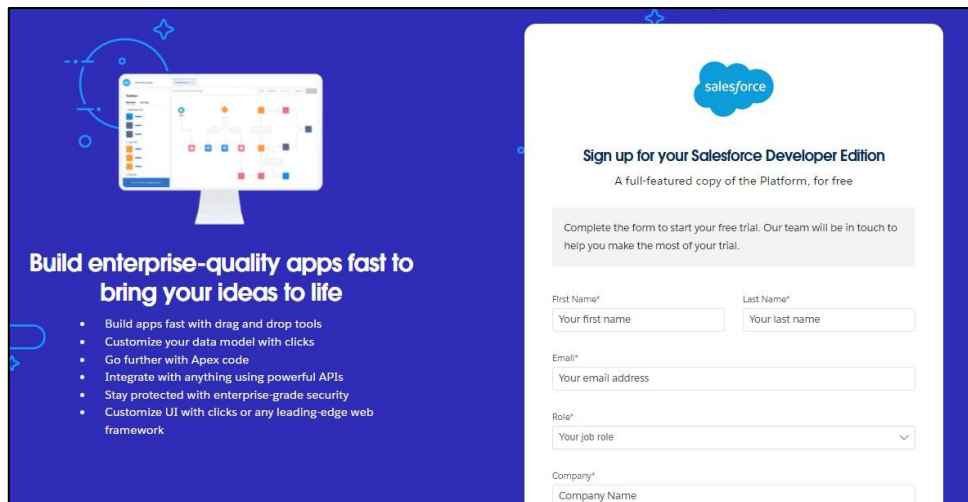
Example Triggers:

- 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.



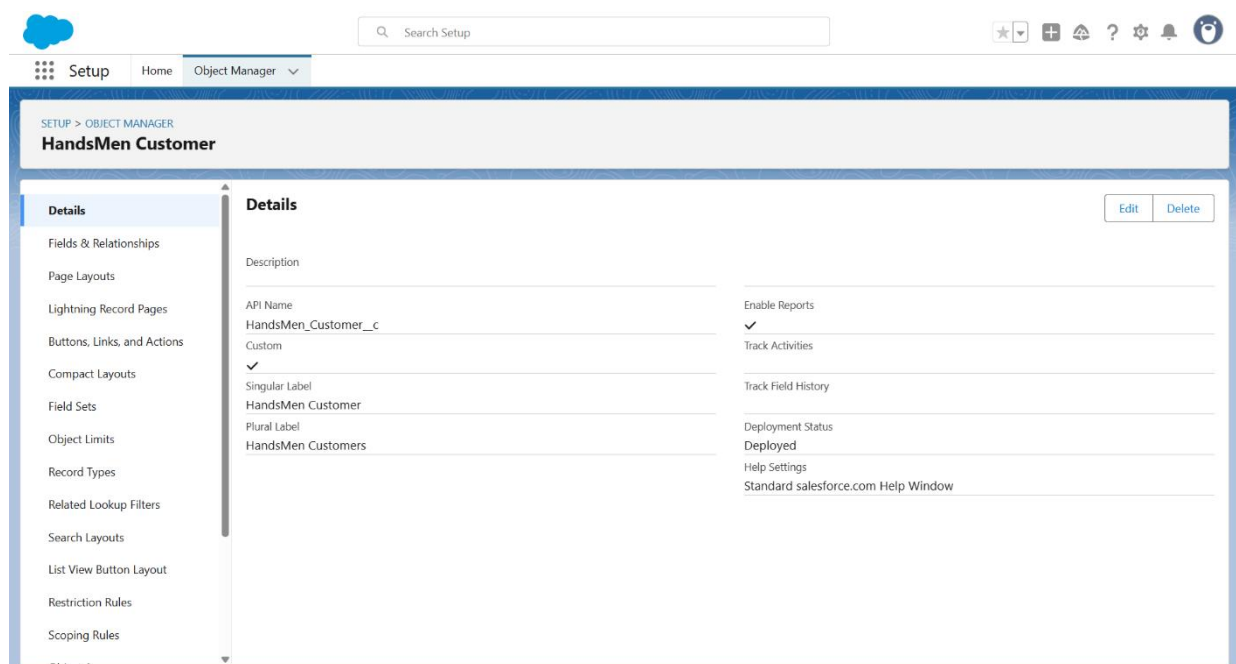
## 2. Custom Object Creation

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 'New HandsMen Customer' form. The form includes fields for 'HandsMen Customer Name' (containing 'Ash'), 'Email' (containing 'ash'), 'Phone', 'Loyalty Status' (set to '--None--'), 'FirstName', 'LastName', and 'Total Purchases'. A red error message is shown below the email field: 'Enter a valid email address, such as name@email.com.' A modal dialog box is open in the foreground with the title 'We hit a snag.' and the message 'Review the following fields' followed by a list containing 'Email'. The form also features a 'Cancel' button, a 'Save & New' button, and a 'Save' button. A legend in the top right corner indicates that an asterisk (\*) denotes required information.

### 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 includes a header with a 'SETUP Users' link and a user profile icon. Below the header, there's a navigation bar with links to various user management features. The main section is titled 'User Detail' and contains a table of user information. The table has two columns: 'User Detail' and 'User License'. The 'User Detail' column lists fields like Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Delegated Approver, Manager, Receive Approval Request Emails, Federation ID, and App Registration: One-Time. The 'User License' column lists fields like Role, User License, Profile, Active, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Push Registrations, Data.com User Type, Accessibility Mode (Classic Only), Debug Mode, High-Contrast Palette on Charts, and Load Lightning Pages While. The user's role is 'Sales', user license is 'Salesforce', profile is 'Platform 1', and they are active. The 'Load Lightning Pages While' checkbox is checked.

User Detail	User License
Name	Niklaus Mikaelson
Alias	nmika
Email	abhipawanoji@gmail.com [Verify] ⓘ
Username	abhip1@gmail.com
Nickname	User17528458207969969681 ⓘ
Title	
Company	
Department	
Division	
Address	
Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)
Locale	English (United States)
Language	English
Delegated Approver	
Manager	
Receive Approval Request Emails	Only if I am an approver
Federation ID	
App Registration: One-Time	ⓘ
Role	Sales
User License	Salesforce
Profile	Platform 1
Active	✓
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>
Site.com Publisher User	<input type="checkbox"/>
WDC User	<input type="checkbox"/>
Mobile Push Registrations	View ⓘ
Data.com User Type	ⓘ
Accessibility Mode (Classic Only)	<input type="checkbox"/> ⓘ
Debug Mode	<input type="checkbox"/> ⓘ
High-Contrast Palette on Charts	<input type="checkbox"/> ⓘ
Load Lightning Pages While	✓ ⓘ

## 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.

SETUP

Classic Email Templates

Formatting Controls

Font

Size

Available Merge Fields

Select Field Type

Contact Fields

Select Field

Copy Merge Field Value

Copy and paste the merge field value into a section below.

HTML Email Content

Subject

Required Information

Your Order has been Confirmed!

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 when an order is updated to Confirmed.
- Sends an Order Confirmation email to the related customer.

```

graph TD
    Start([Record-Triggered Flow  
Start]) --> RunImmediately([Run Immediately])
    RunImmediately --> EmailAlert[Order Confirmation  
Email Alert]
    EmailAlert --> End([End])
  
```

Flow Builder: Order Confirmation Flow - V1

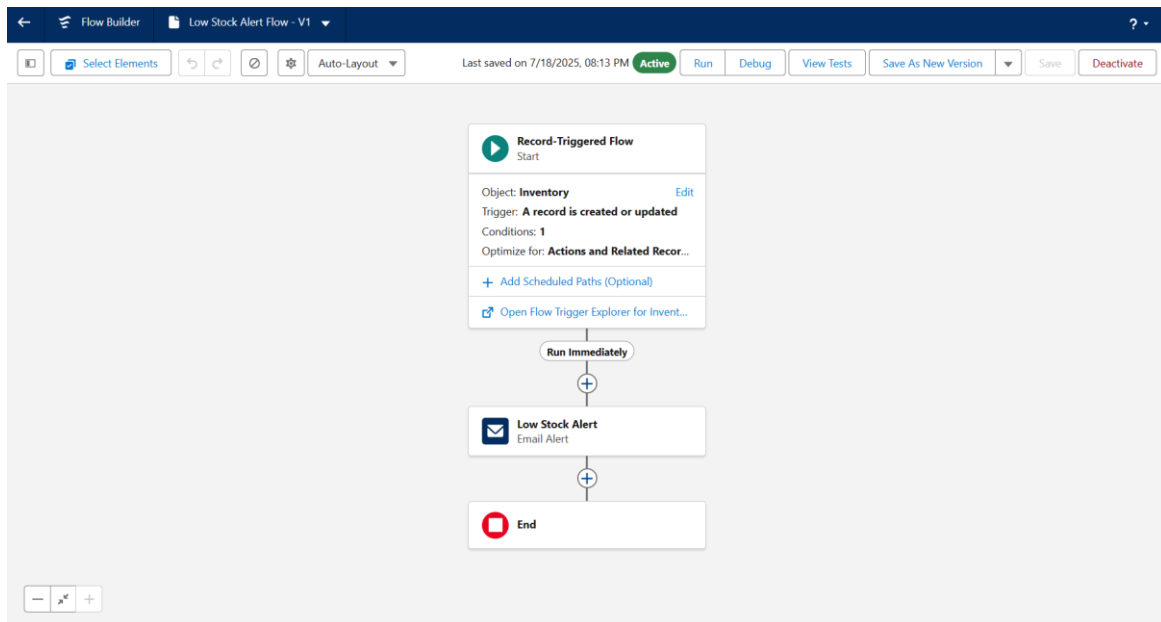
Last saved on 7/18/2025, 08:10 PM **Active** Run Debug View Tests Save As New Version Save Deactivate

Flow Steps:

- Record-Triggered Flow** (Start)
  - Object: HandsMen Order
  - Trigger: A record is updated
  - Conditions: 1
  - Optimize for: Actions and Related Recor...
  - + Add Scheduled Paths (Optional)
  - Open Flow Trigger Explorer for Hands...
- Run Immediately**
- Order Confirmation** (Email Alert)
- End**

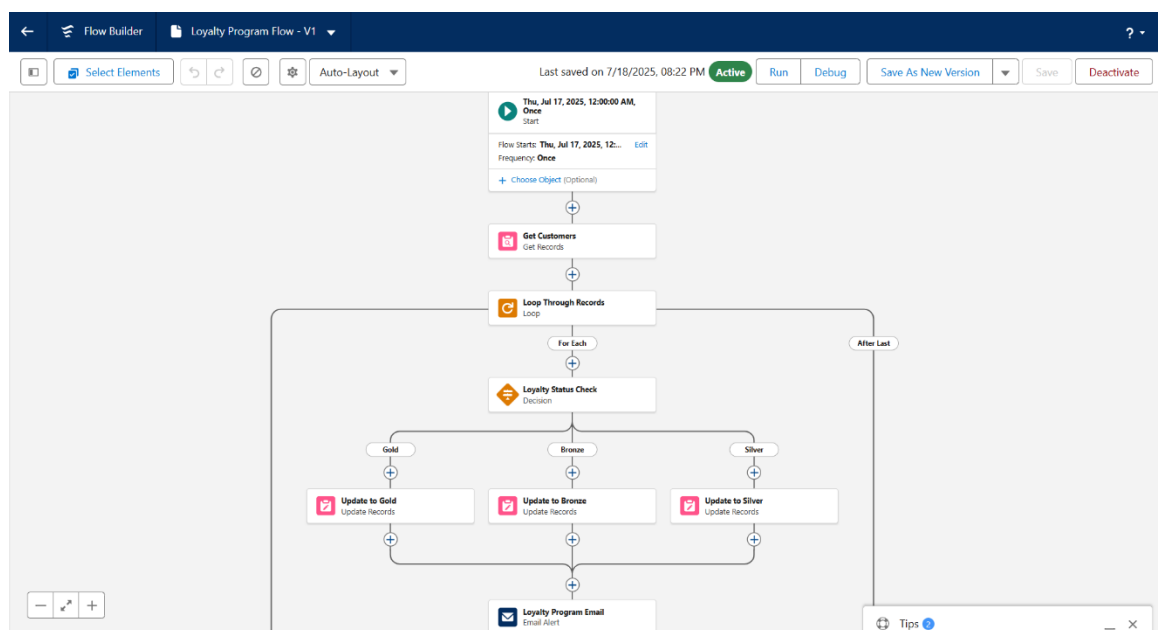
### b. Stock Alert Flow

- Triggered when Inventory stock drops below 5.
- Sends Low Stock email to Inventory Manager.



### c. Scheduled Flow: Loyalty Update

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



## 7. 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, Brian Mark , 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 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**

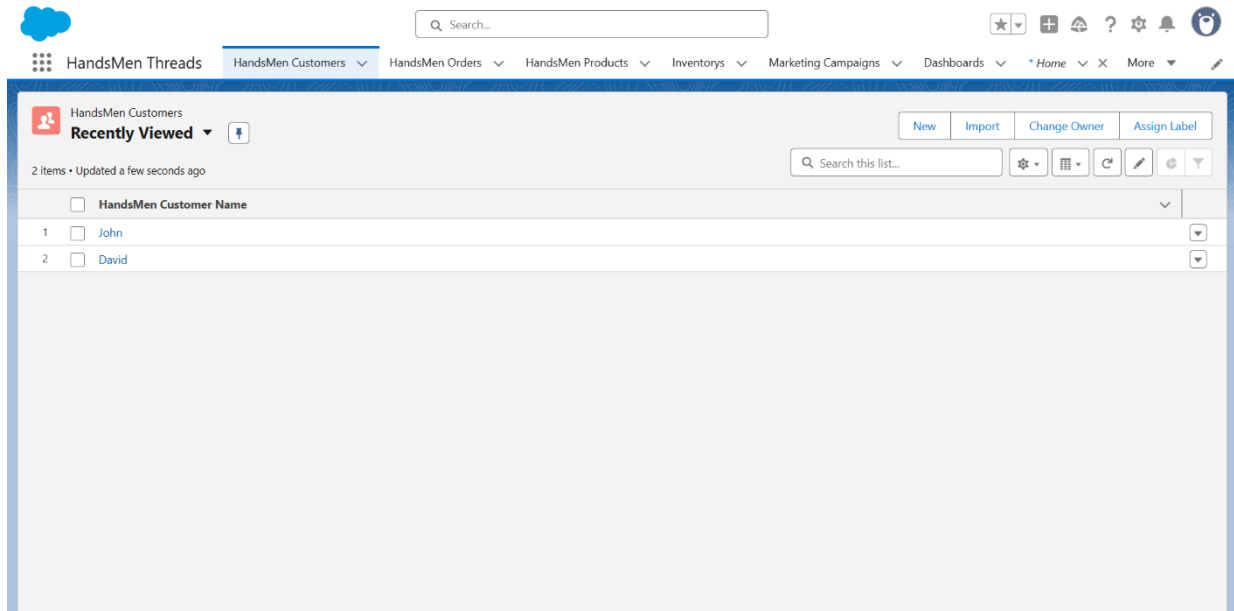
- When a new order is placed or loyalty status is updated:
- Flow + Email Alert is triggered.
- Elijah gets an email:  
“Thanks for your purchase! Your loyalty status is now Silver.”

## **7. Users and Roles**

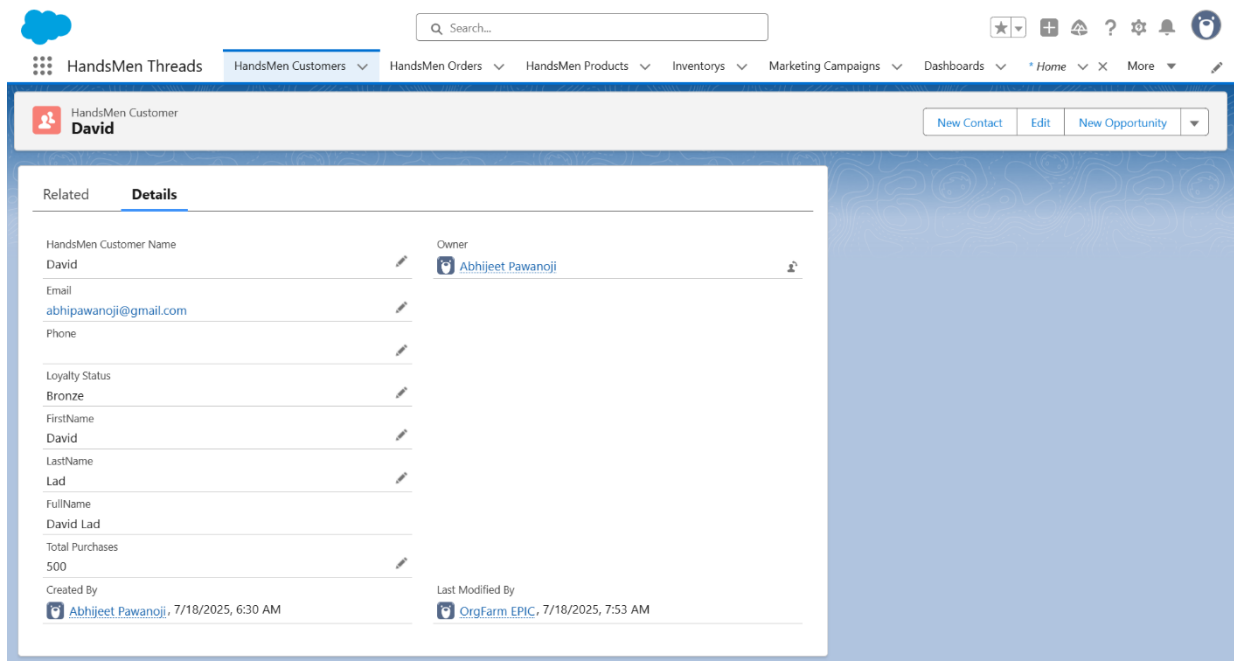
Salesforce users like store staff are created:

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

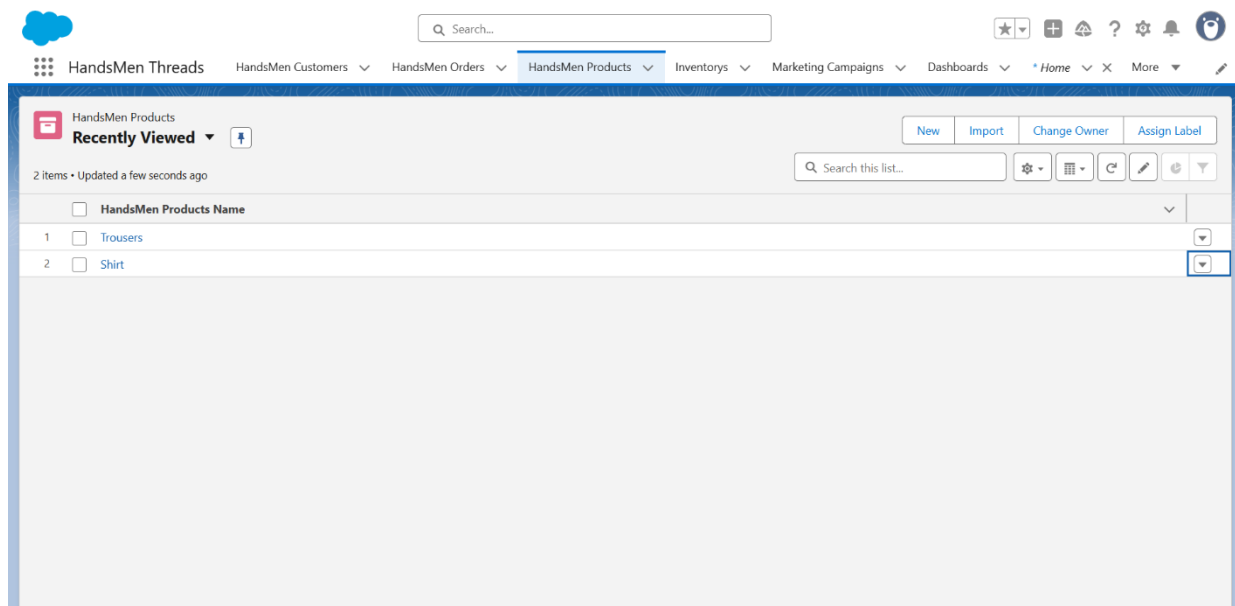
# SCREENSHOTS



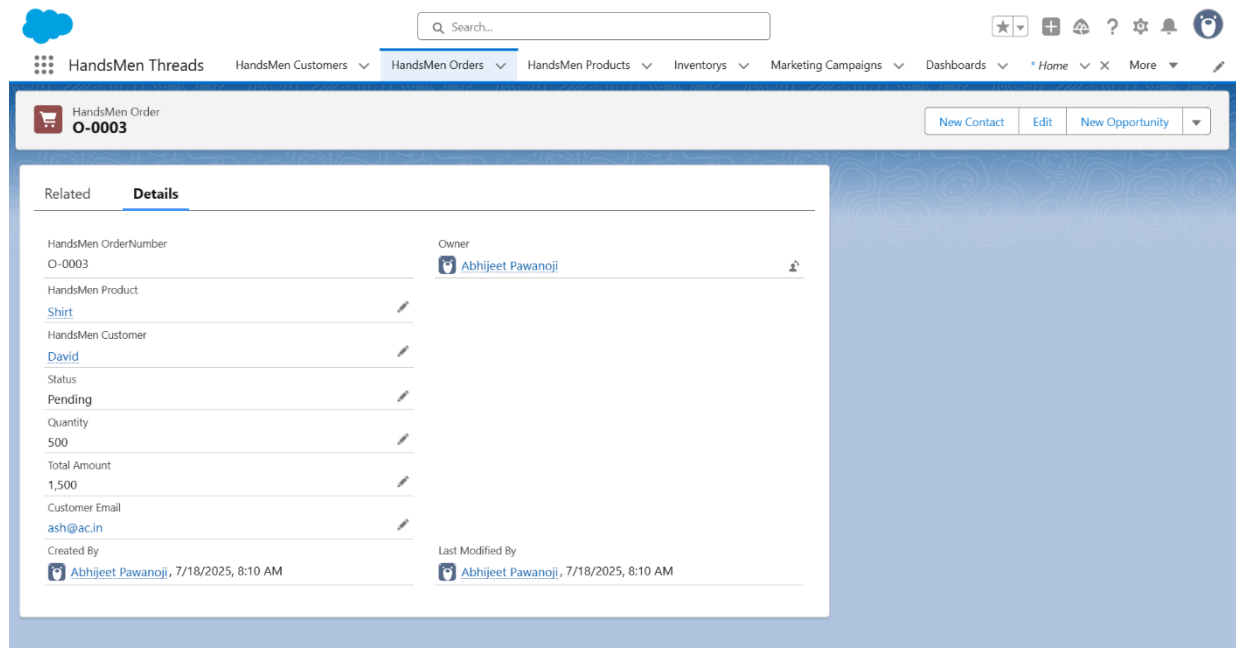
**Fig: Custom App for HandsMen Threads**



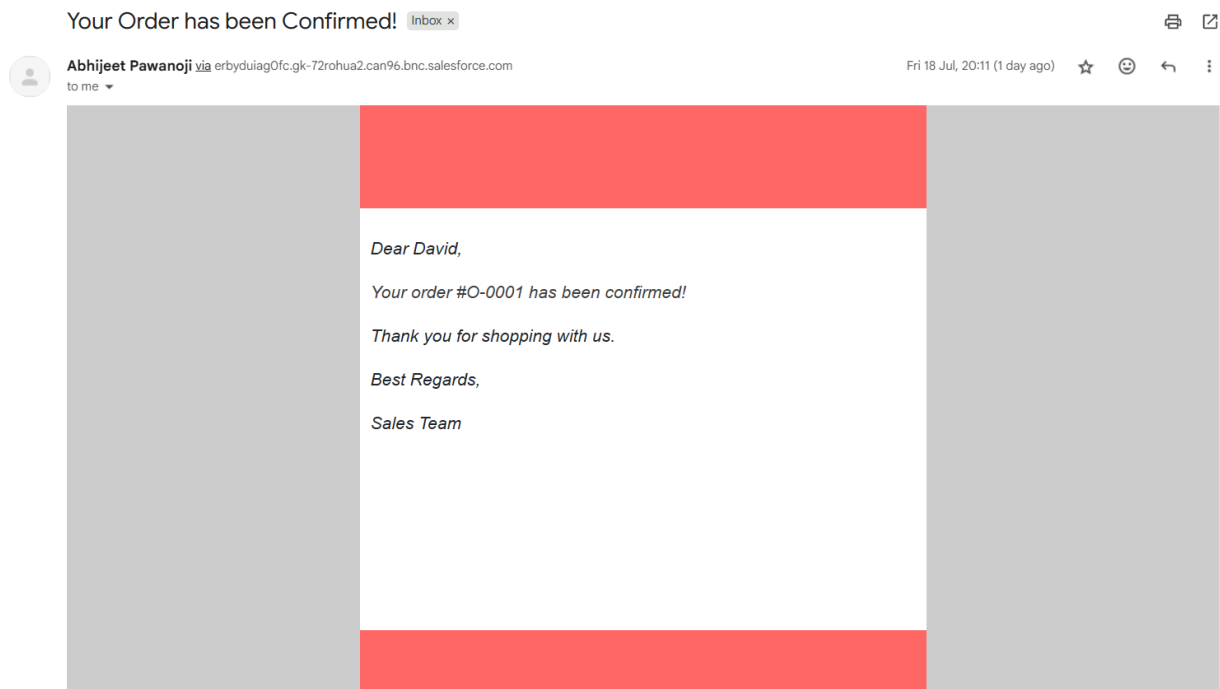
**Fig: Customer Creation in HandsMen Threads**



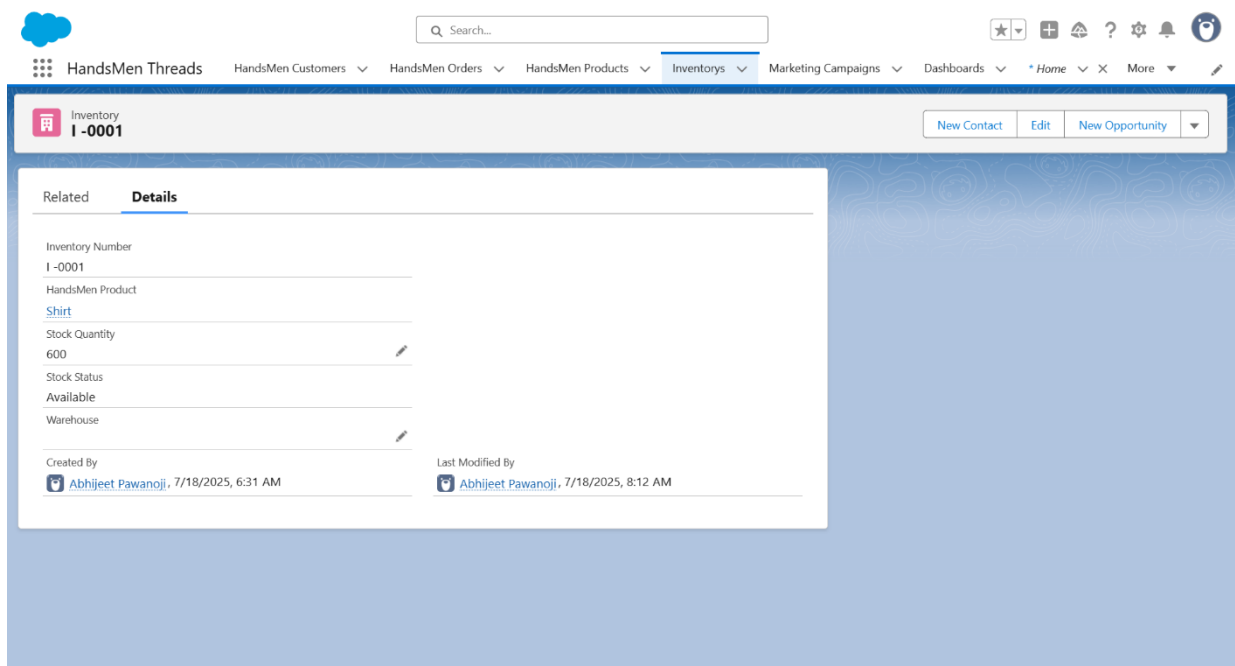
**Fig: Products in HandsMen Threads**



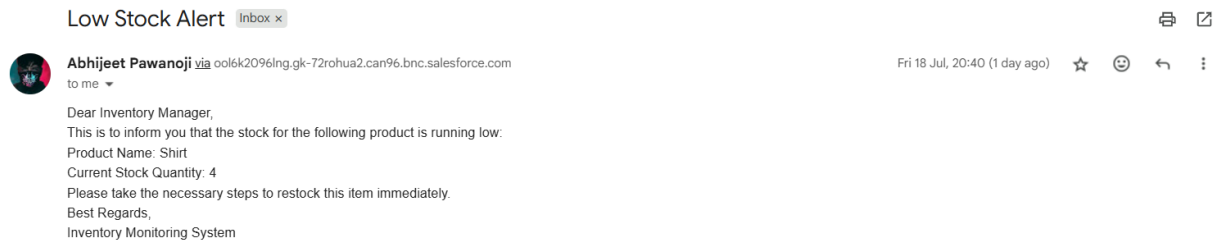
**Fig: Order Confirmation**



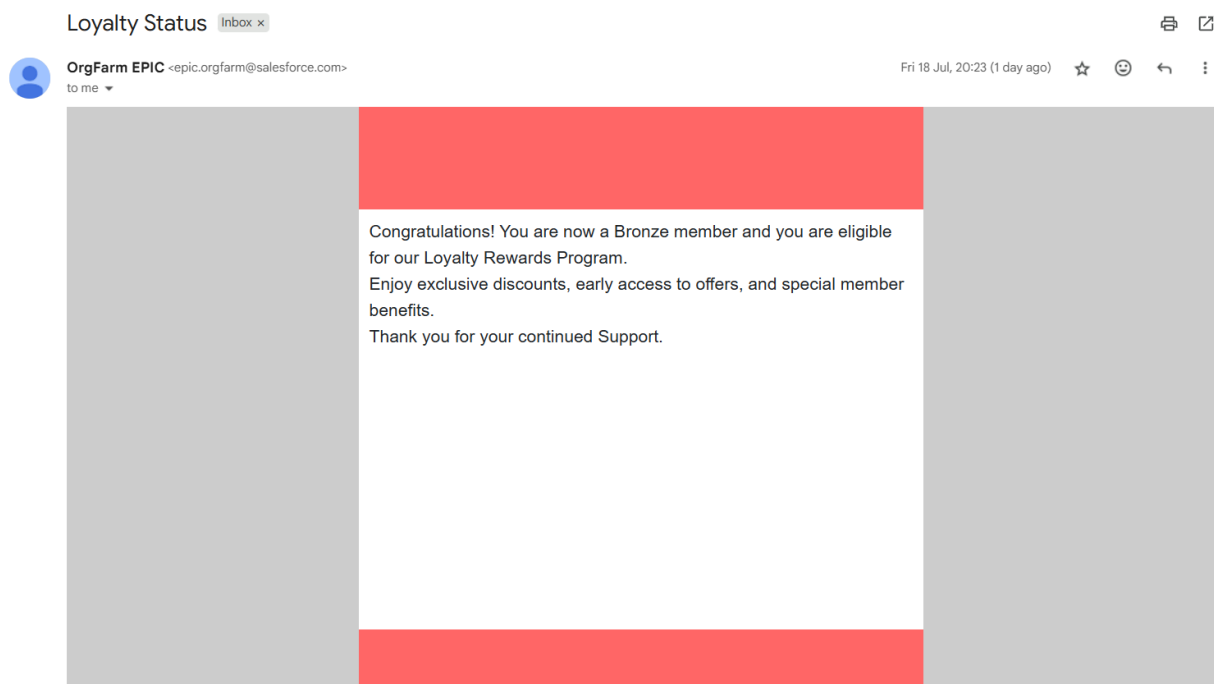
**Fig: Order confirmation Email**



**Fig: Inventory Creation**



**Fig: Low Stock Alert Email**



**Fig: 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 & Dashboards**

- 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.

- **Abhijeet Pawanoji**