

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.

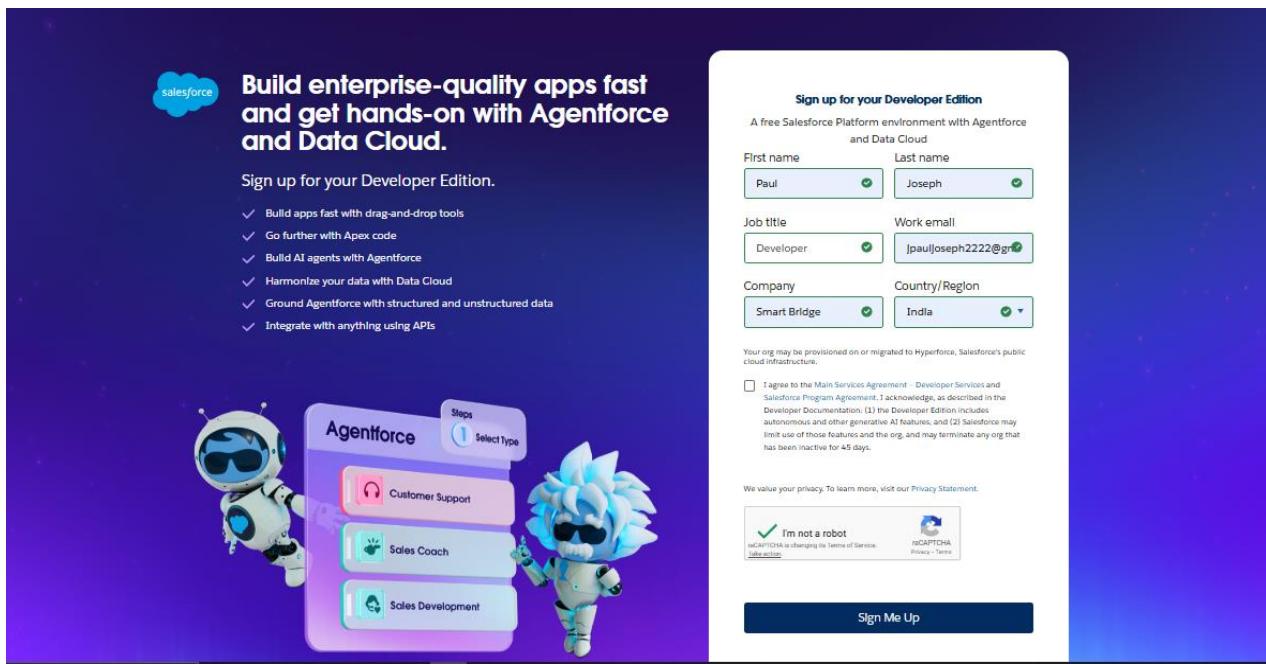
Example Triggers:

- 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

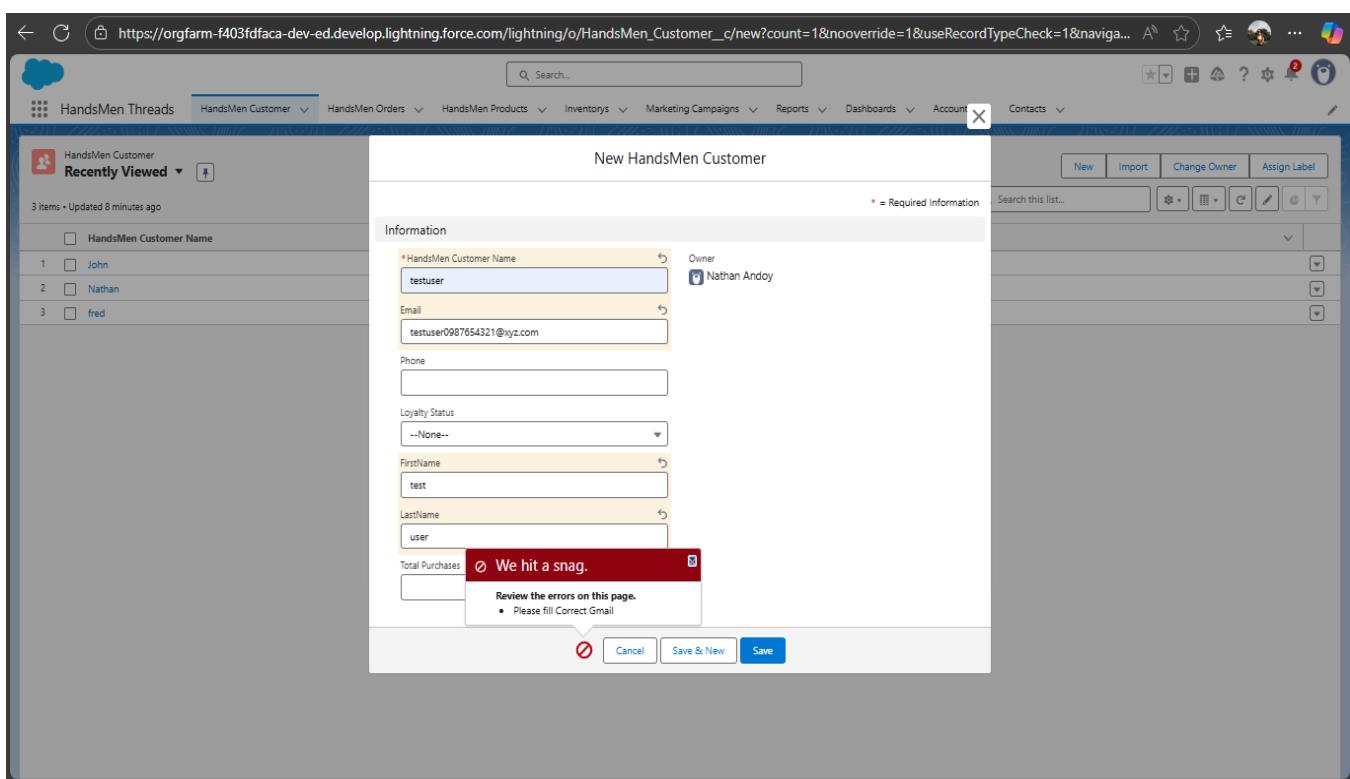
3. Creating the Lightning App

- 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 shows the Salesforce Lightning Experience. On the left, there's a sidebar with a 'Recently Viewed' list containing three items: 'John', 'Nathan', and 'fred'. The main area is titled 'New HandsMen Customer' and contains fields for 'HandsMen Customer Name' (set to 'testuser'), 'Email' (set to 'testuser0987654321@xyz.com'), 'Phone' (empty), 'Loyalty Status' (set to '--None--'), 'Firstname' (set to 'test'), 'Lastname' (set to 'user'), and 'Total Purchases' (empty). A red error message box at the bottom left says 'We hit a snag.' with a link to 'Review the errors on this page.' and a note 'Please fill Correct Gmail'. At the bottom right are 'Cancel', 'Save & New', and 'Save' buttons.

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.

User Detail

Name	Niklaus Mikaelson	Role	Sales
Alias	NikMik	User License	Salesforce Platform
Email	jpauljoseph2222@gmail.com [Verified]	Profile	Platform-1
Username	mikaelson@sfuser.com	Active	<input checked="" type="checkbox"/>
Nickname	NikMikaelson	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"/>
Locale	English (United States)	Site.com Publisher User	<input type="checkbox"/>
Language	English	WDC User	<input type="checkbox"/>
Delegated Approver		Mobile Push Registrations	<input checked="" type="checkbox"/>
Manager		Data.com User Type	<input checked="" type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	Accessibility Mode (Classic Only)	<input type="checkbox"/>
Federation ID		Debug Mode	<input type="checkbox"/>
App Registration One-Time Password Authenticator		High-Contrast Palette on Charts	<input type="checkbox"/>
		Load Lightning Pages While Scrolling	<input checked="" 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.

Email Template Detail

Email Template Name	Order Confirmation Send	Available For Use	<input checked="" type="checkbox"/>
Template Unique Name	Order_Confirmation_Send	Last Used Date	
Classic Letterhead	Order Confirmation Email	Times Used	
Email Layout	Free Form Letter		
Encoding	Unicode (UTF-8)		
Author	Paul Joseph J [Change]		
Description			
Created By	Paul Joseph J 11/29/2025, 2:12 AM	Modified By	Paul Joseph J 11/30/2025, 10:40 AM

Email Template

Subject: Order has been confirmed!

HTML Preview:

HANDSMEN THREADS

Dear {!HandsMen_Customer__c.FirstName__c},

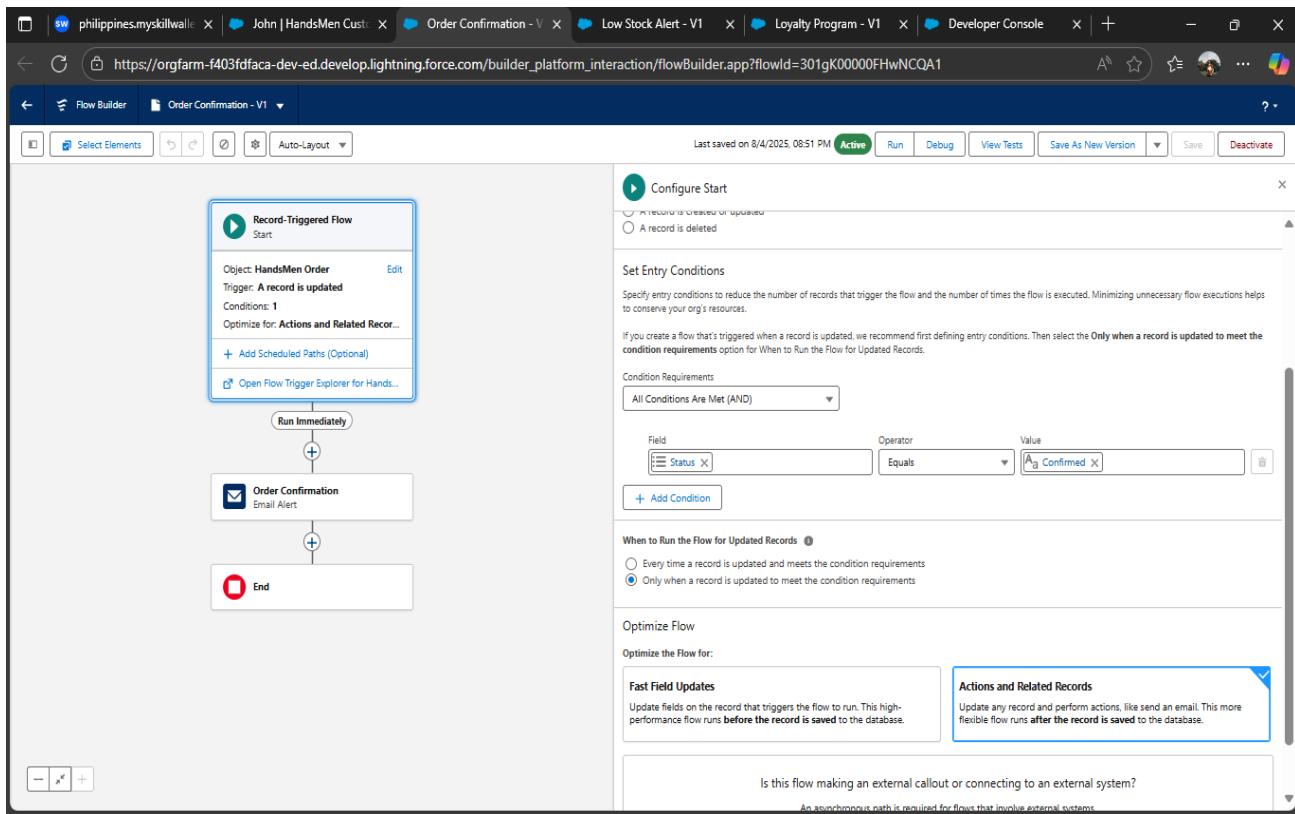
Your order {!HandsMen_Order__c.Order_Name__c} has been confirmed!

Thank you for shopping with us.

8. Flow Implementations

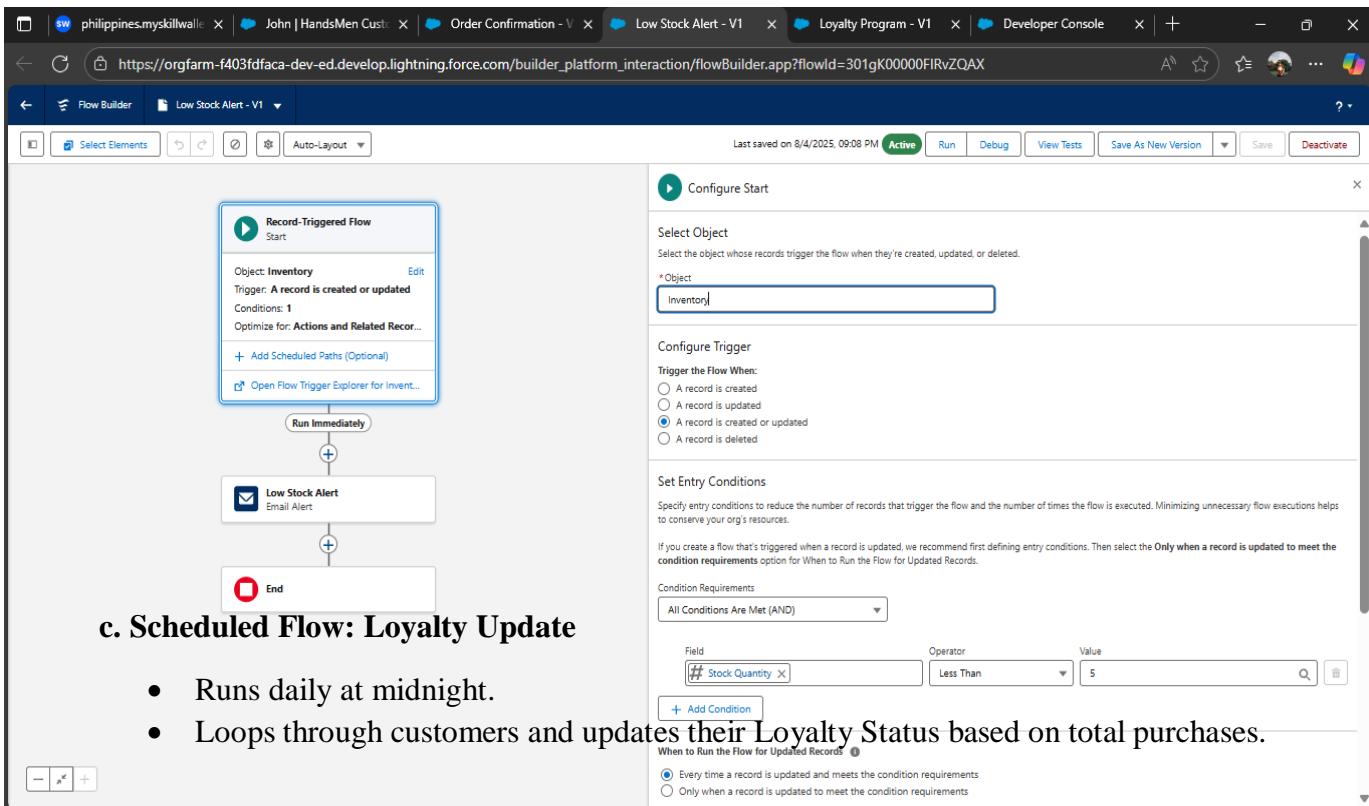
a. Order Confirmation Flow

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



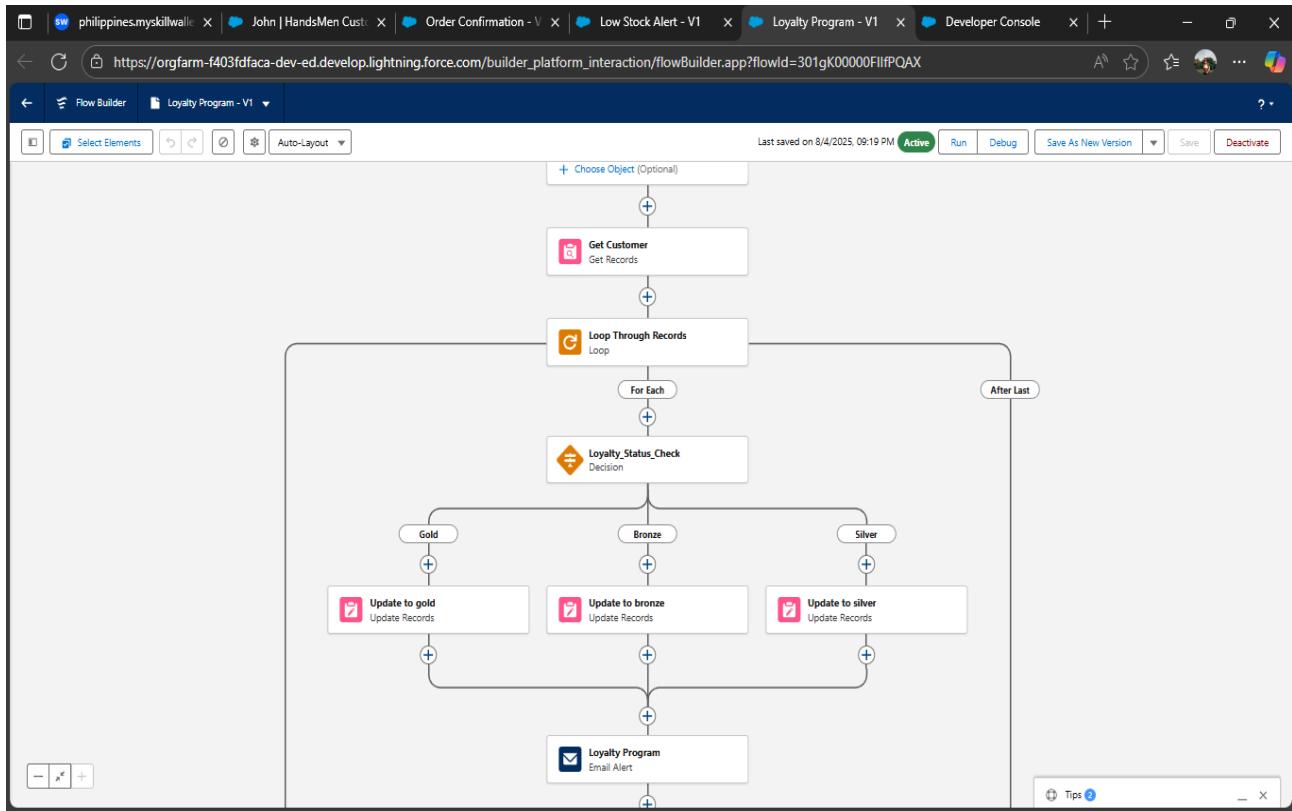
b. Stock Alert Flow

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



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, 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 Total_Amount_c=2×500=₹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

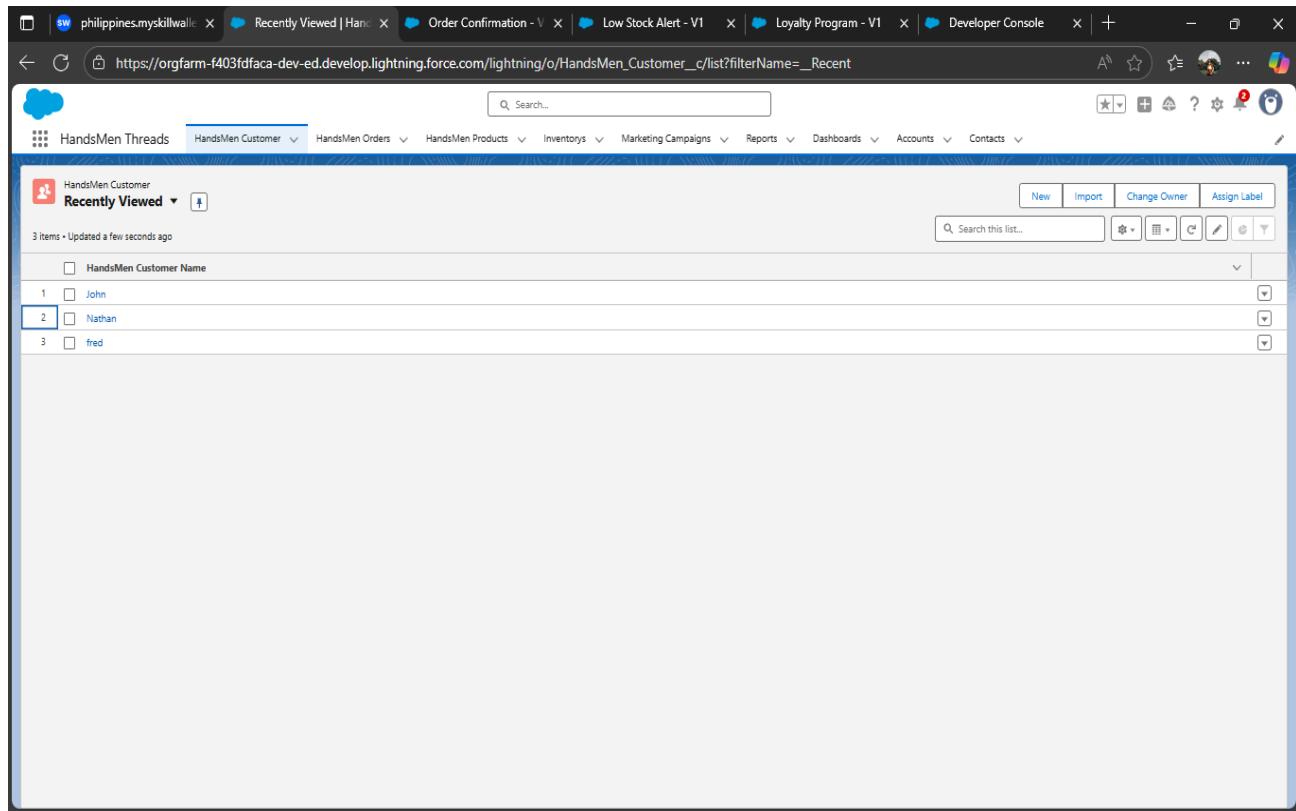


Fig: Custom App for HandsMen Threads

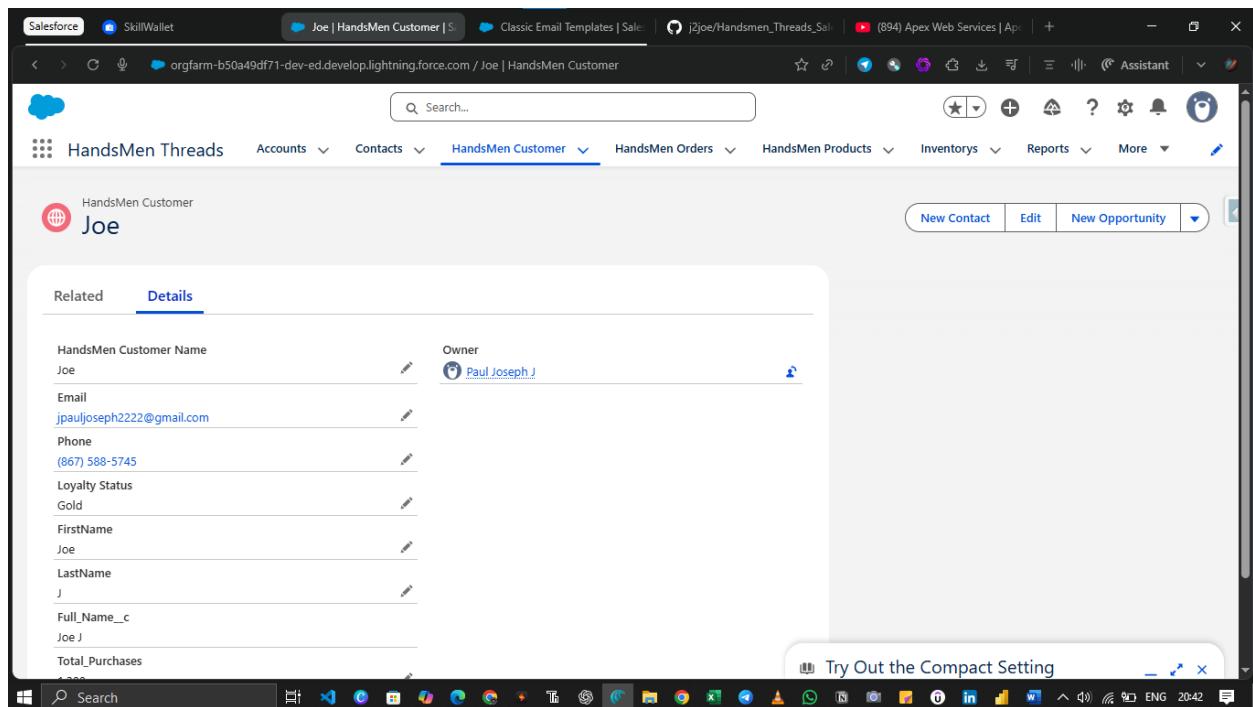


Fig: Customer Creation in HandsMen Threads

The screenshot shows a Salesforce Lightning interface for the 'HandsMen Products' list. The title bar includes tabs like 'Recently Viewed', 'Order Confirmation', 'Low Stock Alert', 'Loyalty Program', and 'Developer Console'. The main header has a cloud icon and the navigation bar: 'HandsMen Threads', 'HandsMen Customer', 'HandsMen Orders', 'HandsMen Products', 'Inventorys', 'Marketing Campaigns', 'Reports', 'Dashboards', 'Accounts', and 'Contacts'. Below the header, a search bar says 'Search...' and a toolbar has buttons for 'New', 'Import', 'Change Owner', and 'Assign Label'. A sub-header 'Recently Viewed' is shown with a dropdown arrow. The main content area displays a table with three items: 1. shoes, 2. T-shirt Cloth, and 3. bags. Each item has a checkbox and a dropdown menu. The status bar at the bottom indicates '3 Items • Updated a few seconds ago'.

Fig: Products in HandsMen Threads

The screenshot shows a Salesforce Lightning interface for the 'HandsMen Orders' detail page. The title bar includes tabs like 'Salesforce', 'SkillWallet', 'O-0003 | HandsMen Order', 'Classic Email Templates', 'j2joe/Handsmen_Threads_So...', and 'Assistant'. The main header has a cloud icon and the navigation bar: 'Accounts', 'Contacts', 'HandsMen Customer', 'HandsMen Orders', 'HandsMen Products', 'Inventorys', 'Reports', and 'More'. Below the header, a search bar says 'Search...' and a toolbar has buttons for 'New Contact', 'Edit', and 'New Opportunity'. The main content area shows a card for 'HandsMen Order O-0003'. It has tabs 'Related' and 'Details'. Under 'Details', there are fields: 'HandsMen OrderNumber' (O-0003), 'Owner' (Paul Joseph J), 'Customer' (Kishore M), 'Status' (Confirmed), 'Quantity' (1), 'Total_Amount' (670), 'HandsMen Product' (Shoes), and 'Customer Email' (calvinkishorem@gmail.com). Each field has an edit icon.

Fig: Order Confirmation

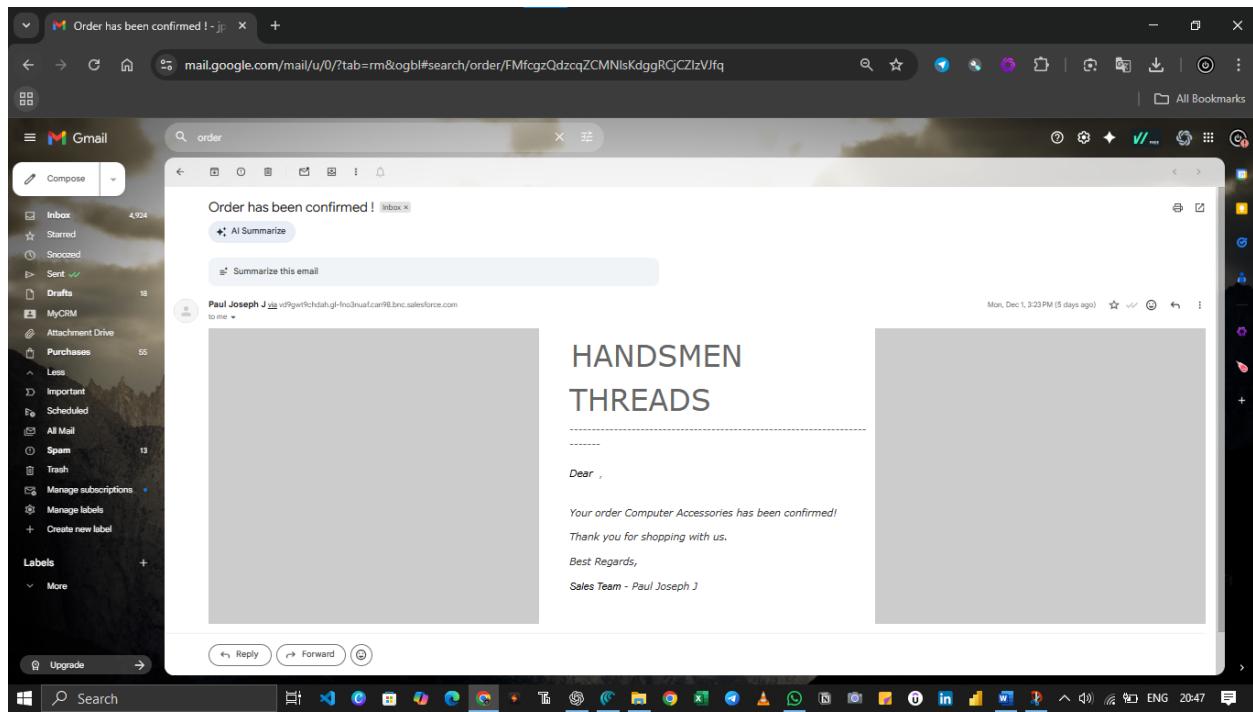


Fig: Order confirmation Email

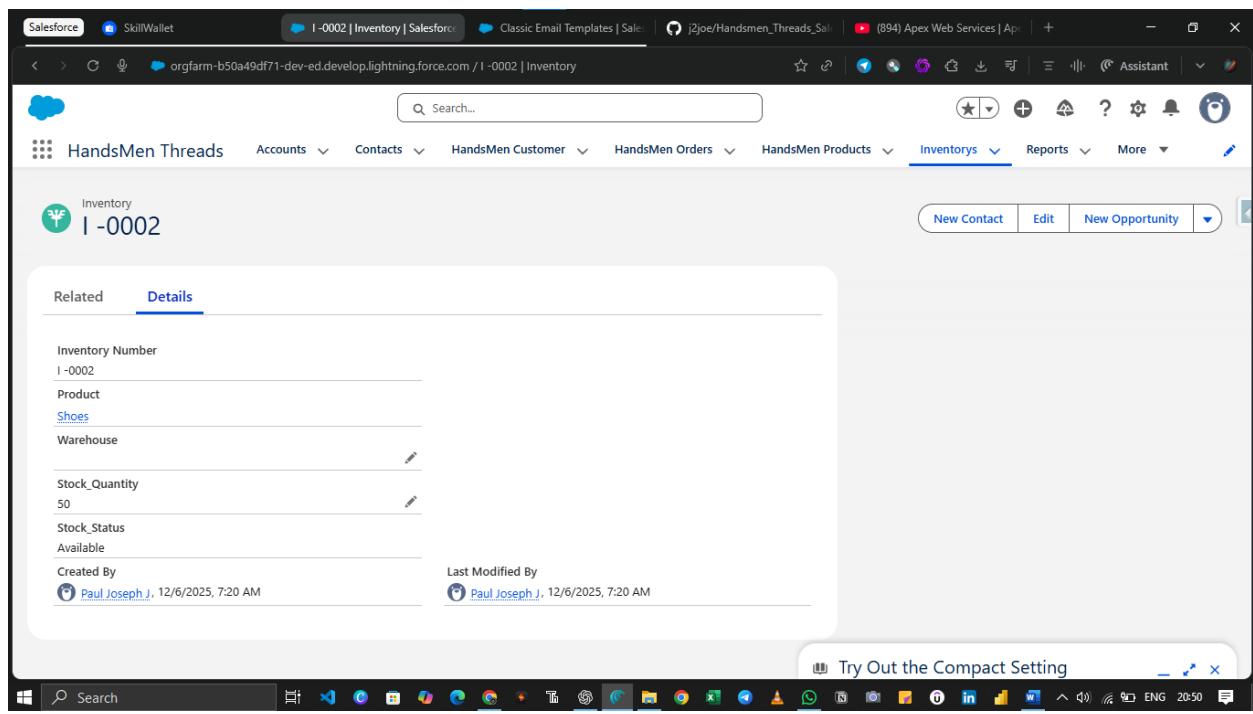


Fig: Inventory Creation

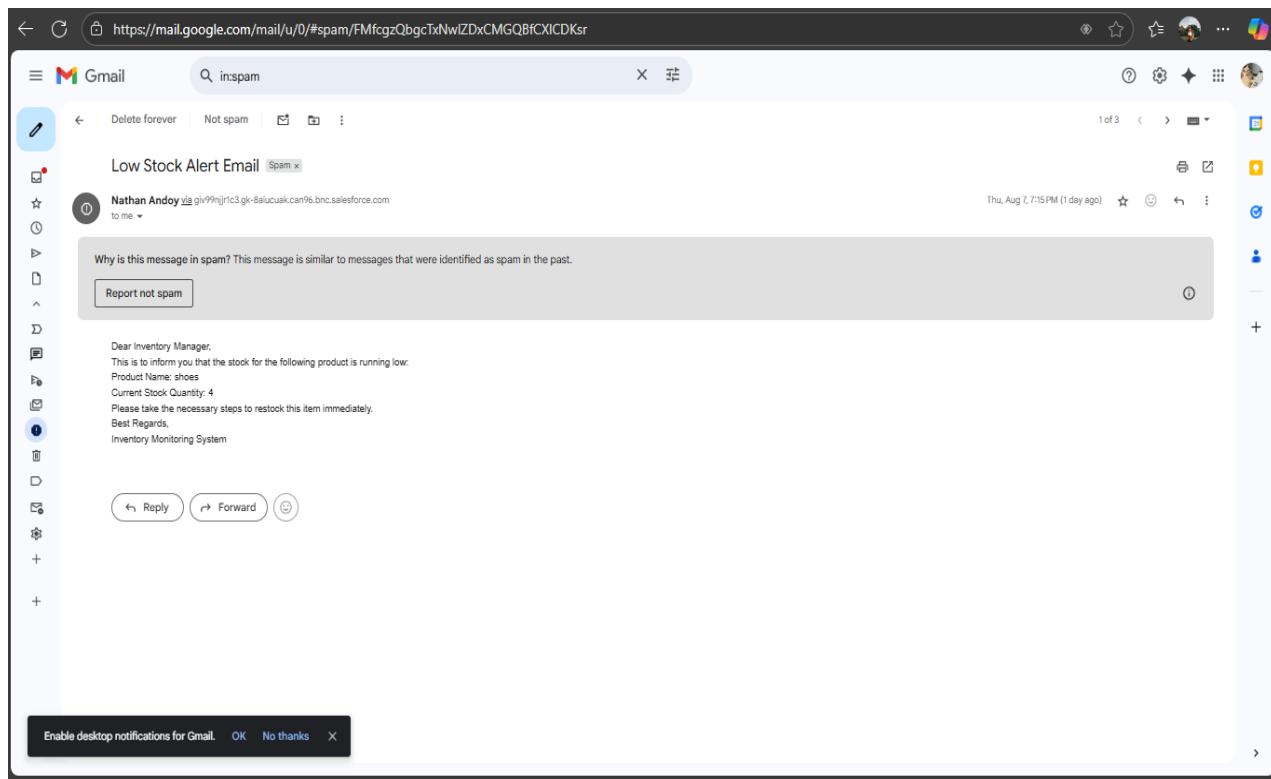


Fig: Low Stock Alert Email

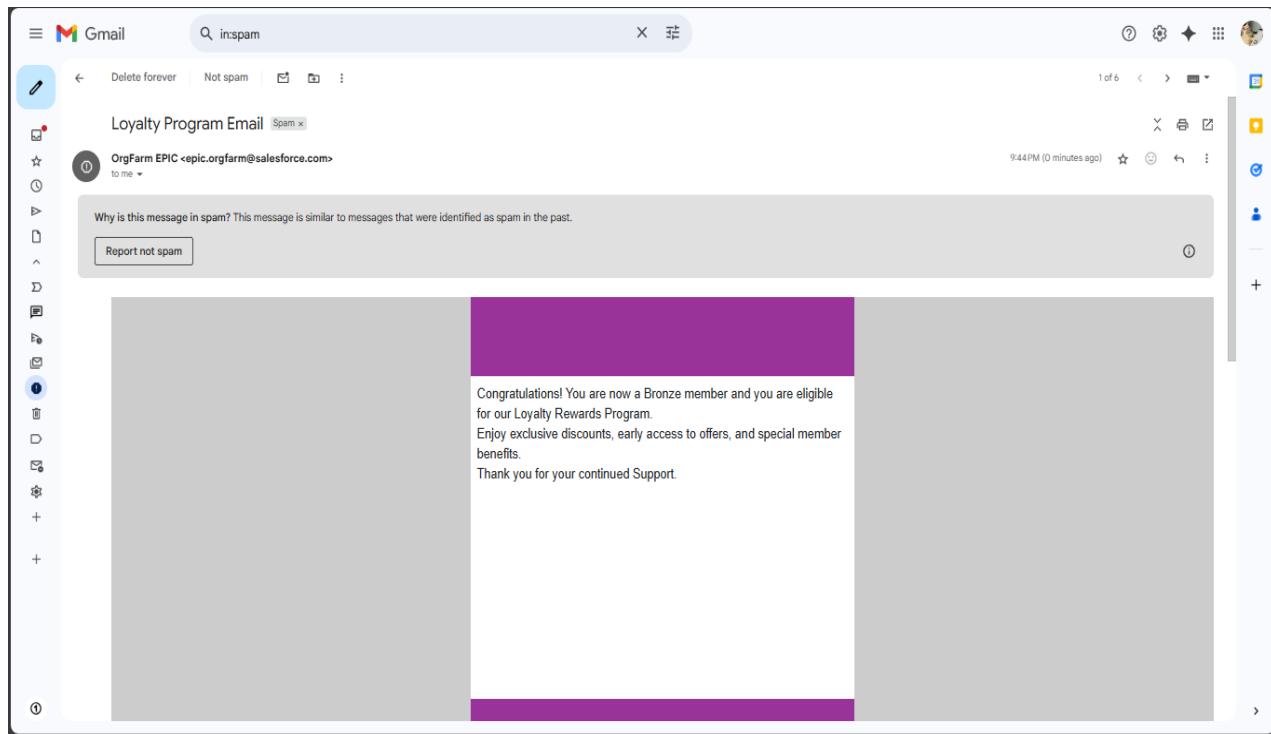


Fig: Loyalty Program Email

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.