

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

ABSTRACT

This project involves creating a customized Salesforce CRM solution for HandsMen Threads, a premium men's fashion and tailoring brand. The system was built to simplify important business processes in sales, inventory, and marketing by using five custom objects and automating tasks through Record-Triggered Flows, Scheduled Flows, Email Alerts, and Apex. Validation rules and role-based security were also added to keep information accurate and secure. By combining all these features in one system, HandsMen Threads can better engage with customers, reduce manual work, and manage inventory more effectively. This solution also gives the business a strong and scalable platform that supports future growth and offers a more personalized customer experience.

OBJECTIVE

- Build a centralized Salesforce CRM that connects customer, order, inventory, and marketing information into one organized system for HandsMen Threads.
- Automate important business processes using Flows, Email Alerts, and Apex to lessen manual tasks and boost overall efficiency.
- Strengthen customer engagement by providing personalized and automated messages such as order updates, loyalty reminders, and marketing promotions.
- Maintain accurate and trustworthy data by applying validation rules, security settings, and role-based access for sales, inventory, and marketing teams.
- Establish a scalable CRM framework that can support future business expansion and help HandsMen Threads grow its operations and customer reach.
- Improve inventory tracking and control through automated low-stock warnings and scheduled batch updates to ensure proper stock management.

TECHNICAL DESCRIPTION

This project uses Salesforce, a cloud-based Customer Relationship Management (CRM) platform, to build an integrated business system for HandsMen Threads. Salesforce offers a flexible and scalable environment where custom objects, automated processes, and secure data handling can be created without relying on physical servers. The solution uses several Salesforce features, including Record-Triggered Flows, Scheduled Flows, Email Alerts, Validation Rules, Reports, Dashboards, and Apex, to automate tasks, send real-time updates, and support advanced customization. Apex was used to handle more complex functions such as batch inventory updates and automated record processing. Salesforce's role-based security setup ensures that only authorized users can access sensitive business information, while its cloud architecture allows users to work from any device, anywhere. Overall, these tools work together to increase efficiency, improve data accuracy, and deliver a more personalized experience for HandsMen Threads' customers.

DETAILED EXECUTION OF THE PROJECT PHASES

1. Developer org setup:

Creating Developer Account

Creating a developer org in salesforce.

1. Go to <https://developer.salesforce.com/signup>
2. On the sign up form, enter the following details :

2. Object creation:

Object - HandsMen Customer

Object - HandsMen Product

Object - HandsMen Order

Object - Inventory

Object - Marketing Campaign

3. Data management and lookup relationship

Field - Email

Field - Phone

Field - Loyalty Status

Create Lookup Relationship

Formula Fields

Create Remaining fields for the objects

4. Creating Validation rules

Validation Rules

Create Remaining Validation Rules

5. Creating data configuration , Data Security- Profiles, Data Security- Roles, DataSecurity- Users and Data Security- Permission set

Validation Rules

Create Remaining Validation Rules

Data security - Profiles

Profile - Sales

Data Security - Roles

Role - Sales

Create Roles

Data Security - Users

User - Niklaus

User - Kol

Create Users

Data Security - Permission Set

Permission set -
Permission_Platform_1

6. Creating Email Template Email Template

Create an Order Confirmation Email
Template

Create Remaining Email Templates

Create an Email Alert

7. Creating Flows

Create Order Confirmation Email

Create Stock Alert Email (Record-
Triggered)

Create a Scheduled Flow

8. Creating automation using Apex

Create Apex Class

Created Components:

HandsMen Customer

HandsMen Threads

HandsMen Customers

HandsMen Orders

HandsMen Products

Inventorys

Marketing Campaigns

Reports

More

Search...

Star

+

Cloud

?

Settings

2

Profile

HandsMen Customers

Recently Viewed

NewImportChange OwnerAssign Label

4 items • Updated a few seconds ago

Search this list...

HandsMen Customer Name

1lea

2Thea

3john

4jin

HandsMen Orders

HandsMen Threads

HandsMen Customers

HandsMen Orders

HandsMen Products

Inventorys

Marketing Campaigns

Reports

More

Search...

Star

+

Cloud

?

Settings

2

Profile

HandsMen Orders

Recently Viewed

NewImportChange OwnerAssign Label

10 items • Updated a few seconds ago

Search this list...

HandsMen OrderNumber

1O-0010

2O-0009

3O-0007

4O-0008

5O-0006

6O-0005

7O-0002

8O-0001

HandsMen Products

HandsMen Threads

HandsMen Customers

HandsMen Orders

HandsMen Products

Inventorys

Marketing Campaigns

Reports

More

Search...

Star

+

Cloud

?

Settings

2

Profile

HandsMen Products

Recently Viewed

NewImportChange OwnerAssign Label

2 items • Updated a few seconds ago

Search this list...

HandsMen Product Name

1Shorts

2T-shirt cloth

Inventorys

Q Search...

★

+

?

⚙

2

HandsMen Threads

HandsMen Customers

HandsMen Orders

HandsMen Products

Inventorys

Marketing Campaigns

Reports

More

Inventorys

Recently Viewed

New

Import

Assign Label

2 items • Updated a few seconds ago

Q Search this list...

	<input type="checkbox"/> Inventory Number	
1	<input type="checkbox"/> I-0002	
2	<input type="checkbox"/> I-0001	

Marketing Campaigns

Q Search...

★

+

?

⚙

2

HandsMen Threads

HandsMen Customers

HandsMen Orders

HandsMen Products

Inventorys

Marketing Campaigns

Reports

More

Marketing Campaigns

Recently Viewed

New


Import

Change Owner

Assign Label

0 items • Updated a few seconds ago

Q Search this list...



Order Confirmation

Dear Thea,

Your order #O-0009 has been confirmed!

Thank you for shopping with us.

Best Regards,

Sales Team

Stock Alert

Dear Inventory Manager,

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

Product Name: Shorts

Current Stock Quantity: 4

Please take the necessary steps to restock this item immediately.

Best Regards,

Inventory Monitoring System

CONCLUSION

The development of the Salesforce CRM system for HandsMen Threads shows how cloud-based tools can improve and modernize operations in the men's fashion industry. Through custom objects, automated workflows, and strong data security, the project successfully combined sales, inventory, and marketing processes into a single, easy-to-use platform. The system now helps the business manage customer interactions, track orders, monitor inventory, and handle marketing activities with better accuracy and efficiency. Automated features like order updates, low-stock alerts, and scheduled record processing reduce manual work and let the team focus more on customer service and business growth. Because Salesforce is scalable, the system can easily adapt as the company expands while still providing reliable performance and secure data management. Overall, this project demonstrates that using CRM technology strategically can significantly improve business operations, strengthen customer relationships, and support long-term growth for a modern fashion brand like HandsMen Threads.