

HandsMenThreads: Elevating Men's Fashion with Salesforce

PROJECT OVERVIEW

The project titled HandsMen Threads, a premium men's fashion brand, involves the creation of a completely built Salesforce CRM system. The primary goal of the project is to innovate and simplify how the business has been managing its customer, order, inventory and marketing functions as the business continues to expand. This project takes full advantage of Salesforce's cloud-based capabilities, where we were able to automate manual business processes, guarantee data accuracy, and provide real-time transparency across the business functions.

The system's capabilities include personalized objects, smart automation flows, accurate rules for validation, immediate email notifications, and custom Apex code- all working together to improve customer satisfaction, efficiency and productivity within the sales function, while alleviating stock issues and provides precise data-driven picture of business performance. By integrating everything into one smooth system, HandsMen Threads now has more efficiency, consistency and visibility than ever before with how the brand interacts with customers and how day to day operations are fulfilled.

OBJECTIVE

The main objective of this HandsMen Threads project was the creation and implementation of a Salesforce CRM solution for HandsMen Threads to raise its customer satisfaction and improve its overall productivity.

Specifically, the project aimed to:

- Automate repetitive functions including order confirmation, managing loyalty tier levels, and tracking shortages.
- Ensure data entry would be both accurate and consistent based on validation rules.
- Provide direct visibility to teams when it came to inventory balances, customer activity, and sales data.
- Provide improved coordination and communication among sales, inventory, and marketing teams.
- Provide a unique customer experiences via automated email and tracking of loyalty programs.

TECHNOLOGY DESCRIPTION

This section describes the technological components and Salesforce tools used to create the HandsMen Threads CRM System. The Salesforce platform was carefully configured for each feature to streamline the business processes, safeguard data integrity, and increase user efficiency.

Salesforce Platform

The Salesforce Platform formed the basis of the project, acting as a cloud-based Customer Relationship Management (CRM) system that brings all aspects related to the customer together. The platform provides an integrated platform with tools for automation, optimization for marketing, and management of sales. The platform's user-friendly drag-and-drop interface allowed for relatively rapid basic configuration of standard processes, and with its advanced coding capabilities through Apex and Flows, complex business processes and automation could be supported smoothly and rapidly.

Custom Objects

Custom Objects were developed to act as organized repositories for housing data related to HandsMen Threads operations. These objects contain distinct business information and relationships while keeping the data consistent and accessible:

- **HandsMen Customer_c:** Stores essential customer information such as personal details, contact data, and loyalty status.
- **HandsMen Product_c:** Maintains detailed records of each product, including name, description, unit price, and available stock.
- **HandsMen Order_c:** Records all order-related transactions, linking them to customers and products while tracking quantities, total amounts, and order dates.
- **Inventory_c:** Tracks the stock levels of products, recording quantities available, stock movements, and inventory status, while linking each record to its corresponding warehouse location to ensure inventory management accuracy.
- **Marketing_Campaign_c:** Manages information on promotional and marketing initiatives to assess campaign performance and effectiveness.

Tabs

Custom Tabs were designed as navigation shortcuts to provide users with quick access to data and functionalities. Each tab corresponds to a specific custom object (e.g., HandsMen Customers, HandsMen Orders, HandsMen Products), enabling users to efficiently create, view, and manage records within the HandsMen Threads application.

Custom Application

To improve the productivity, user experience, and efficiency, a custom Lightning App was created named HandsMen Threadsto unify all system components into one space. This app provides a single point of access to the appropriate tabs (HandsMen Customers, HandsMen Orders, HandsMen Products, Inventoryst, Marketing Campaign, Reports, Dashboards, Accounts, and Contacts) in order to enhance the flow of work and improve efficiency.

Profiles and Roles

To maintain secure and structured access control, Profiles and Roles were established within Salesforce:

- **Profiles** define user permissions, data accessibility, and interface configurations. Custom profiles, such as the Platform 1 were created to align with specific job functions.
- **Roles** manage hierarchical data visibility, ensuring that users can access records relevant to their position. For instance, in the project, there are 3 custom made roles namely Sales, Marketing, and Inventory, each of which has its own respective users assigned to.
- **Permission Sets** were implemented to grant users additional privileges without modifying their core profiles. This approach allows for flexible access management, enabling users to utilize specialized tools or functionalities as needed.

Validation Rules

To uphold data integrity and accuracy, Validation Rules were configured to verify user input before records are saved. Examples include:

- Ensuring valid email formatting (e.g., must contain “@gmail.com”).
- Preventing the creation of orders that would result in negative product stock levels.

Email Templates and Alerts

Email Templates and Email Alerts were used to automate communications:

- **Email Templates** promote a standard format of professional communication including, order confirmations and loyalty updates.
- **Email Alerts** will automatically notify either the customer, or staff internal to the business when a specific action occurs, such as a new order being placed or when loyalty status changes.

Flows

Salesforce Flows allowed complex processes to be automated in a visual, no-code experience. Developed flows include:

- 1. Order Confirmation Flow:** Sends confirmation emails automatically when an order is created.

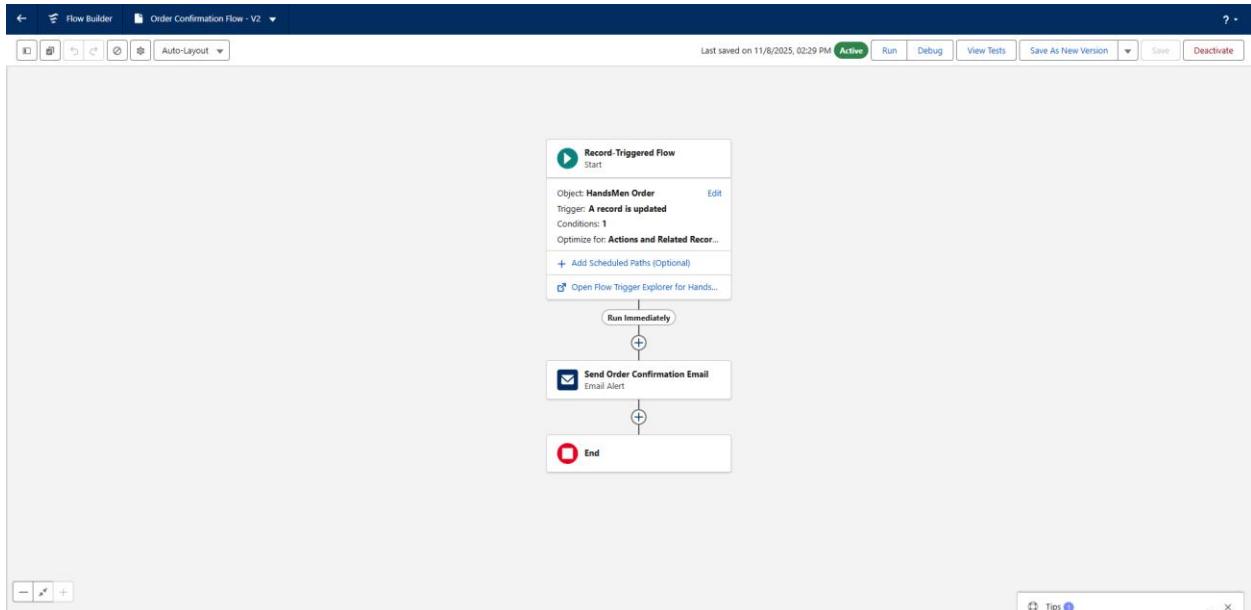


Figure 1. Order Confirmation Flow

- 2. Stock Alert Flow:** Alerts the team when the quantity of the product dips below 5.

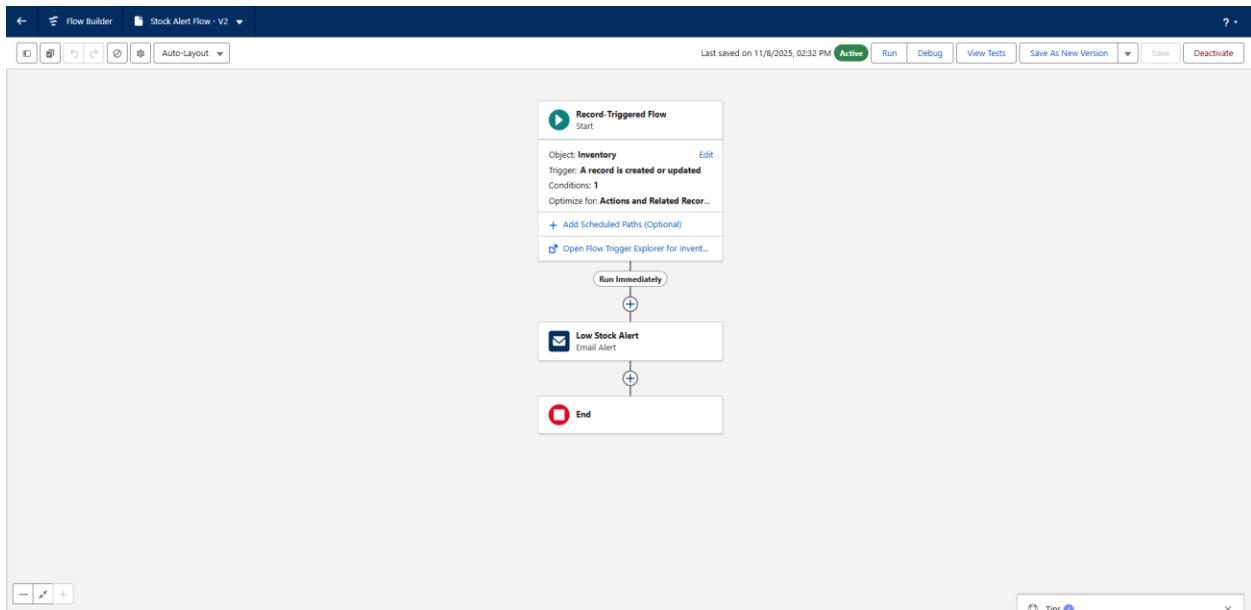


Figure 2. Stock Alert Flow

- 3. Loyalty Status Update Flow:** Runs each day and recalculates customer loyalty status and updates based on cumulative total purchases.

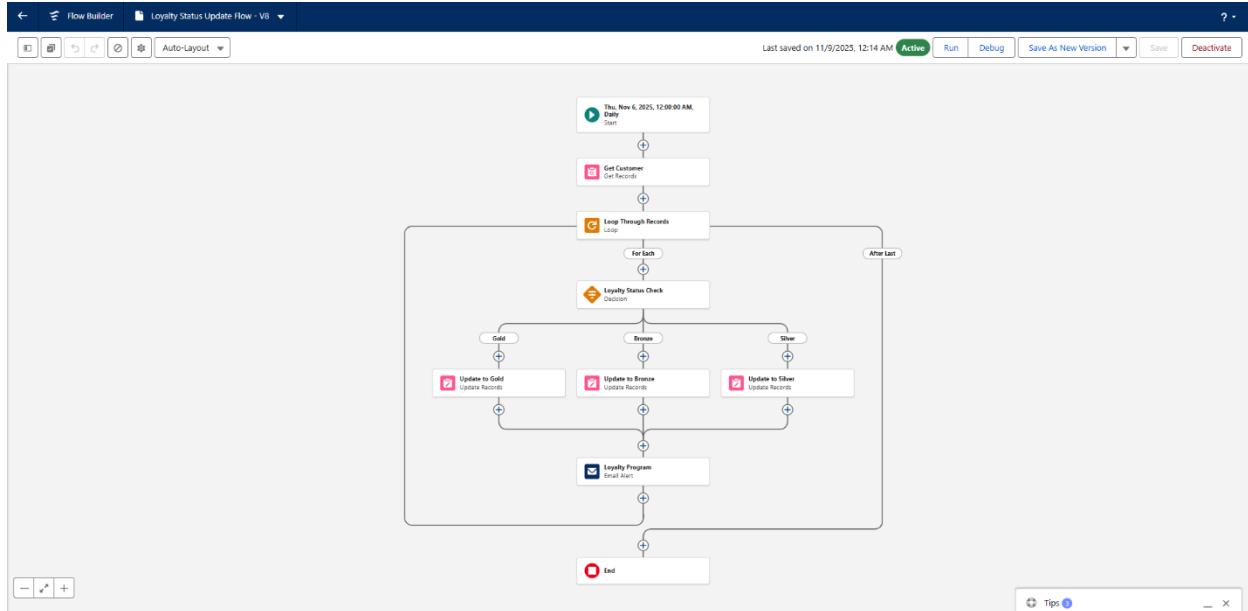


Figure 3. Loyalty Status Update Flow

Apex Programming

Apex, Salesforce's proprietary programming language was used when advanced automation and logical process was needed that was not able to be configured as settings within flows. Custom triggers were developed to apply business rules. Triggers were also developed to automate calculations.

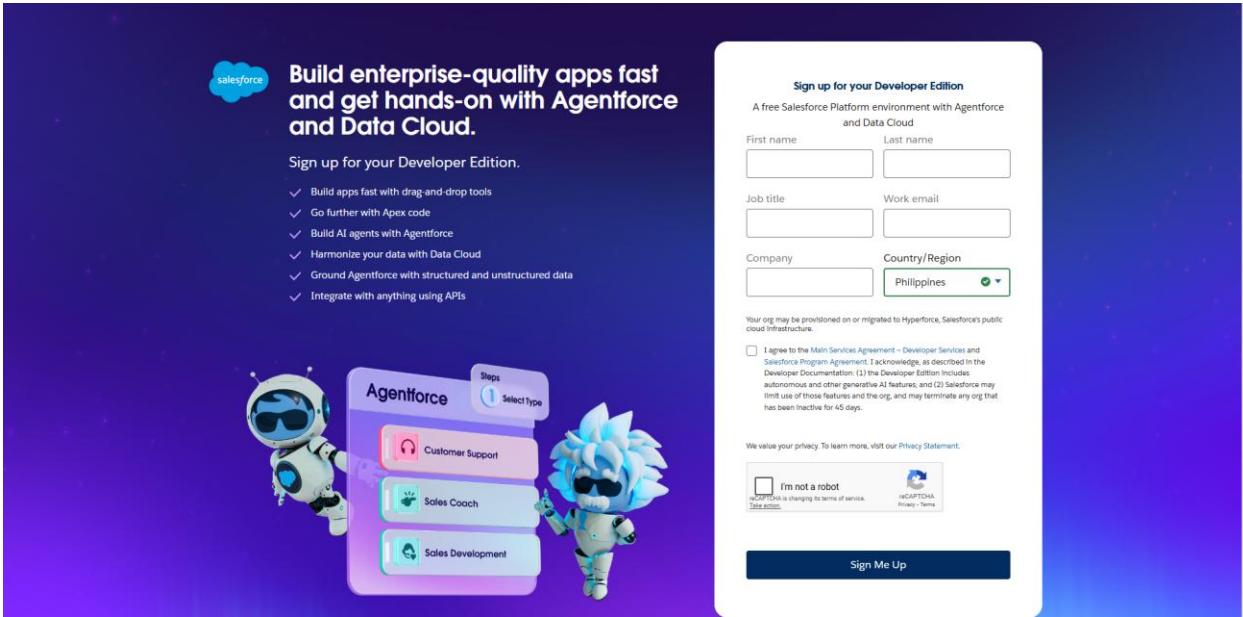
- **Order Total Trigger:** This automatically computes and updates the `Total_Amount__c` field based on quantity and unit price.
- **Stock Deduction Trigger:** This reduces product stock quantities upon order confirmation which ensures accurate inventory management.
- **Loyalty Status Trigger:** This dynamically updates a customer's `Loyalty_Status__c` field in real time according to their total purchase history.

By effectively leveraging these technologies, the HandsMen Threads Salesforce CRM was able to automate important procedures, enhance data reliability, and improve cross-departmental collaboration of the sales, inventory and marketing departments.

DETAILED PROJECT EXECUTION

1. Salesforce Developer Org Setup

A new Salesforce Developer Organization was created through <https://developer.salesforce.com/signup>. This was the primary environment for all configuration,



customization and development work during the course of the project.

Figure 4. Salesforce Developer Edition Sign up

2. Custom Object Creation

The fundamental data structure of the system was established by creating well-defined custom objects and their corresponding fields to capture, classify and manage key business data:

- **HandsMen Customer (HandsMen Customer__c)** – Stores vital customer details including Name (Record Name), Email, Phone, Loyalty_Status__c (Picklist: Bronze, Silver, Gold), and Total_Purchases__c (Number).
- **HandsMen Product (HandsMen Product__c)** – Maintains the product catalog containing Name (Record Name), SKU (Text), Price (Currency), and Stock_Quantity__c (Number).
- **HandsMen Order (HandsMen Order__c)** – Records customer order information such as Order_Number (Record Name), Status (Picklist: Pending, Confirmed, Rejection), Quantity__c (Number), and Total_Amount__c (Number).
- **Inventory (Inventory__c)** – Tracks warehouse inventory levels through fields including Auto Number (Record Name), Warehouse (Text), and Stock_Quantity__c (Number).

- **Marketing Campaign (Marketing_Campaign_c)** – Manages promotional and marketing initiatives with Campaign_Name (Record Name), Start_Date (Date), and End_Date (Date).

Furthermore, relationships such as lookup relationship and master detail relationship were also added to create data associations and dependencies between these objects:

- A Lookup Relationship was created between Marketing Campaign and HandsMen Customer to relate campaigns to customers.
- A Lookup Relationship was created between HandsMen Product and HandsMen Order to associate products with orders.
- A Lookup Relationship was created between HandsMen Order and HandsMen Customer to associate each order with a customer.
- A Master-Detail Relationship was created between Inventory and HandsMen Product to ensure each inventory record is associated directly to a product.

To improve data accuracy through automated calculations, the system also added formula fields to handle such scenarios.

- Inventory__c has Stock_Status__c (Text): IF(Stock_Quantity__c > 10, "Available", "Low Stock")
 - This represents stock availability to stock status.
- HandsMen Customer__c has Full_Name__c (Text): FirstName__c + " " + LastName__c
 - This feature joins the customer's first and last name into one full name field.

3. Custom Lightning Application

A custom Lightning App called “HandsMen Threads” has been created. This app is the one central place for finding all required tabs - HandsMen Customers, HandsMen Orders, HandsMen Products, Inventories, Marketing Campaign, Reports, Dashboards, Accounts, and Contacts - allowing the user to have a centralized and smooth use case for optimal performance.



Figure 5. Lighning App Tabs

4. Validation Rules

Validation rules were created to ensure data accuracy, consistency, and integrity across all custom objects. The rules controls bad data to be inappropriately stored in the system:

- **HandsMen Order (HandsMen Order__c)** – Prevents the entry of invalid order amounts by ensuring that Total_Amount__c cannot be less than or equal to zero.

Formula Used: Total_Amount_c <= 0

- **Inventory (Inventory_c)** – Ensures accurate stock management by preventing the recording of negative or zero values in Stock_Quantity_c.

Formula Used: Stock_Quantity_c <= 0

- **HandsMen Customer (HandsMen Customer_c)** – Maintains a standardized email format by requiring all customer email addresses to include “@gmail.com.”

Formula Used: NOT(CONTAINS>Email, "@gmail.com"))

5. User Profiles and Roles

To implement secure access management and secure data management, the system developed profiles and roles to address this issue:

- **Profiles:** In this system, the profile “Standard User” profile was cloned and an specific profile was created named Platform 1.
- **Roles:** This refers to the hierarchy that was established to control data visibility and workflow permissions depending on the assigned responsibilities of the organization. In this system, the custom roles made are Sales, Inventory, and Marketing.

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6. User Creation

Each user in the system is designated to a particular profile and role based on what they do. For example, Niklaus Mikaelson is assigned to the Sales role while Kol Mikaelson is assigned to Inventory Management.

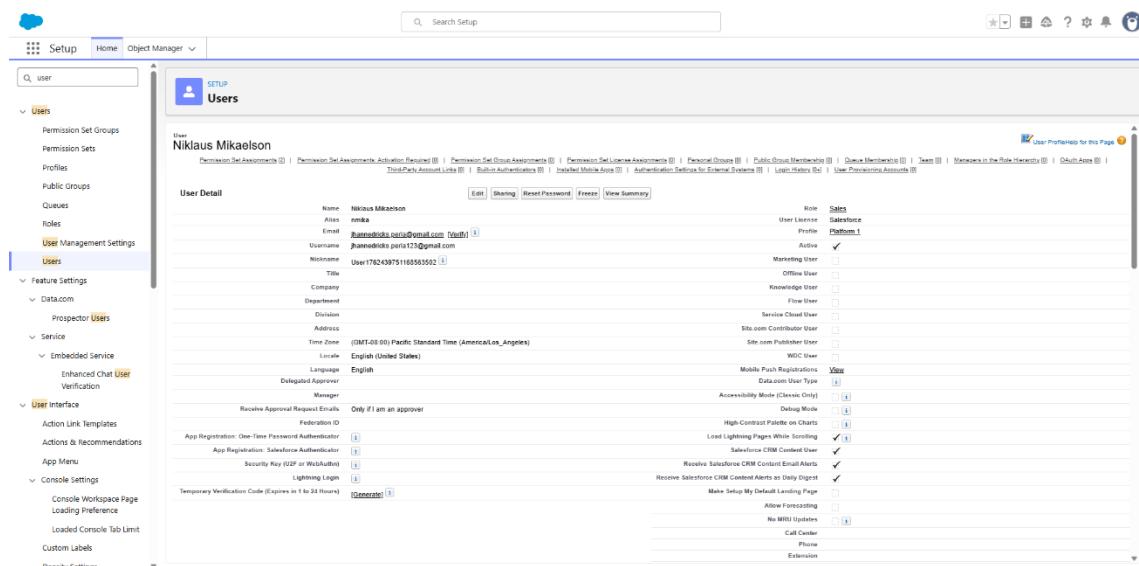


Figure 6.Niklaus Mikaelson User Account

7. Email Templates

Email templates were created to support organization and provide automation/consistency in email communication.

Examples include:

- Order Confirmation Email Template
- Low Stock Alert Template
- Loyalty Program Email Template

8. Flow Implementations

Several different Salesforce Flows were set up in order to streamline complex processes and/or eliminate unnecessary human dependency in processes:

- a. **Order Confirmation Flow (Record-Triggered):** sends order confirmation email to the customer when the order is created.
- b. **Stock Alert Flow (Record-Triggered):** alerts you when the count of a product is less than 5.
- c. **Loyalty Status Update Flow (Scheduled-Triggered):** runs once a day at 12AM to refresh a customer's loyalty status based on the total amounts of their purchases.

9. Apex Triggers

Apex triggers were implemented to automate a few key processes in the Salesforce cloud environment, and to ensure proper calculations and real-time data synchronicity between related records.

a. Order Total Trigger:

The Order Total Trigger calculates and updates the `Total_Amount__c` field on the HandsMen Order (`HandsMen_Order__c`) record before the record is inserted or updated. The apex trigger then reads the product's `Price__c` in HandsMen Product (`HandsMen_Product__c`) and multiplies it by the entered `Quantity__c`, in order to determine the total amount for the order. The trigger does this for efficient transaction and removes the need for manual calculations to ensure the transaction amounts that are saved in the system are accurate.

b. Stock Deduction Trigger:

When a new order is created or an existing order is updated, the stock deduction trigger activates and put into action its internal codes. In a situation where a customer order is marked as "Confirmed," it triggers and automatically search and find the correct inventory item in Inventory_c and deducts the ordered Quantity_c from the Stock_Quantity_c field, making an update to the inventory's product balance and accurately managing the quantity stocks, lessening the hassle on product management and inventory management.

PROJECT DEMONSTRATION: Real-World Application

To simulate how the system works, the sample scenario that follows this sentence demonstrates a complete customer transaction event within the HandsMen Threads app.

1. Customer Registration

One day, a new customer named Jhann Edrick Peria visits the store.

The sales representative of the HandsMen Thread accesses the HandsMen Customer tab of the system and click “New” to input the customer’s details—HandMen Customer Name, Phone, and Email (e.g., jhannedricks.peria.9@gmail.com).

- Validation in Action: If the domain of the email entered is not “@gmail.com” (e.g., jhannedricks.peria.9@microsoft.com), the system will automatically displays an error message: “Please enter a valid Gmail address.”

When the error has been corrected, the customer, which is Jhann Edrick Peria, now is successfully registered in the system.

2. Product Setup

The responsibility of this setup lies with the inventory manager who’s responsibility lies with the proper listing of product information listed under the HandsMen Product.

For example, the inventory manager will add the TShirt product with 100 units as stock and \$100 as its listing price per quantity.

3. Order Placement

When Jhann Edrick Peria decides to purchase the “TShirt”, the sales representative creates a new record under HandsMen Order.

They link the customer and product records, setting the quantity to 10.

- **Apex Trigger in Action:** When the order is saved, the OrderTotalTrigger will automatically calculates and updates Total_Amount__c to \$1000 since Jhann bought 10 pieces of TShirt and each costs \$100.
- **Flow in Action:** The Email Notification Flow will immediately sends Jhann Edrick Peria an order confirmation email summarizing his purchase details.

4. Inventory Update

- **Stock Update Flow:** Once the order is confirmed, the product's stock count decreases automatically from 100 to 90.
- **Validation Rule:** If an attempt is made to order more items than available (e.g., 11 units when only 10 are in stock), the system prevents submission, maintaining inventory accuracy.

5. Loyalty Status Update

- **Scheduled Flow:** To ensure accuracy, the Loyalty Status Update Flow runs daily, verifying and updating all customer loyalty records as necessary.

SCREENSHOTS

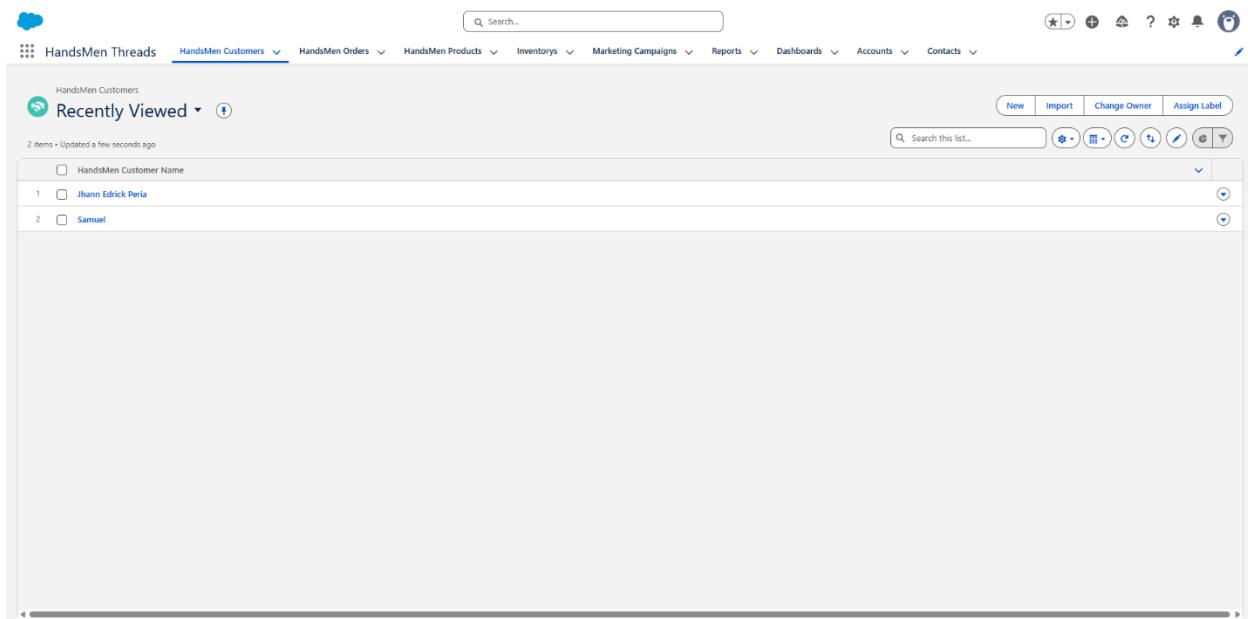


Figure 7. Custom Lightning App for HandMen Threads.

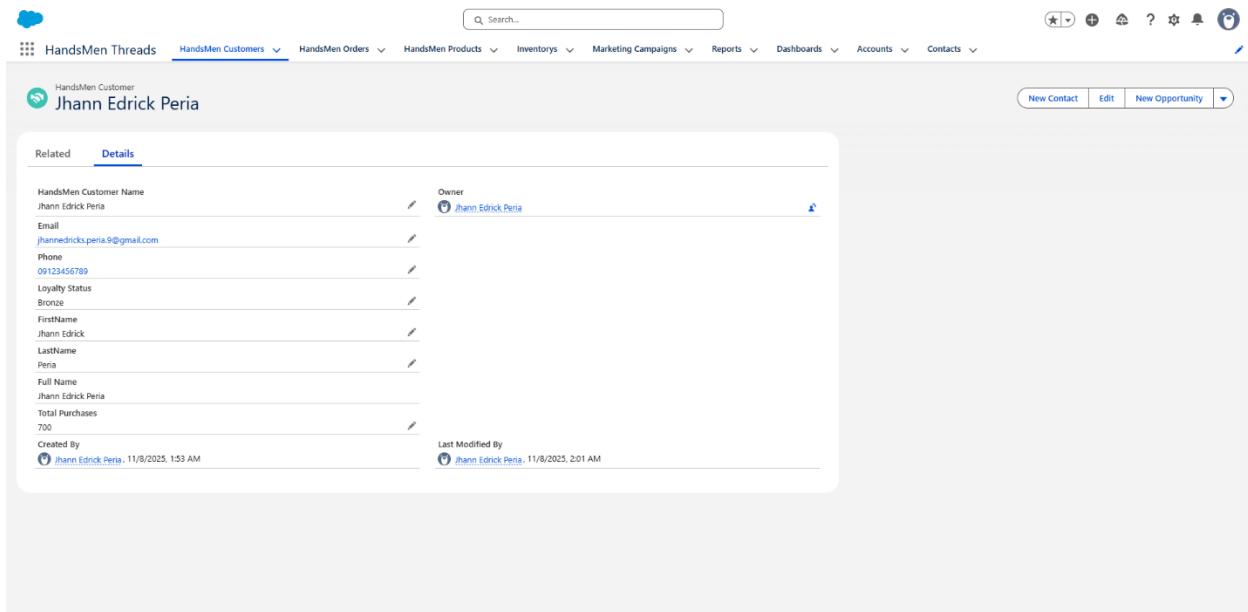


Figure 8. Customer Creation in HandsMen Threads

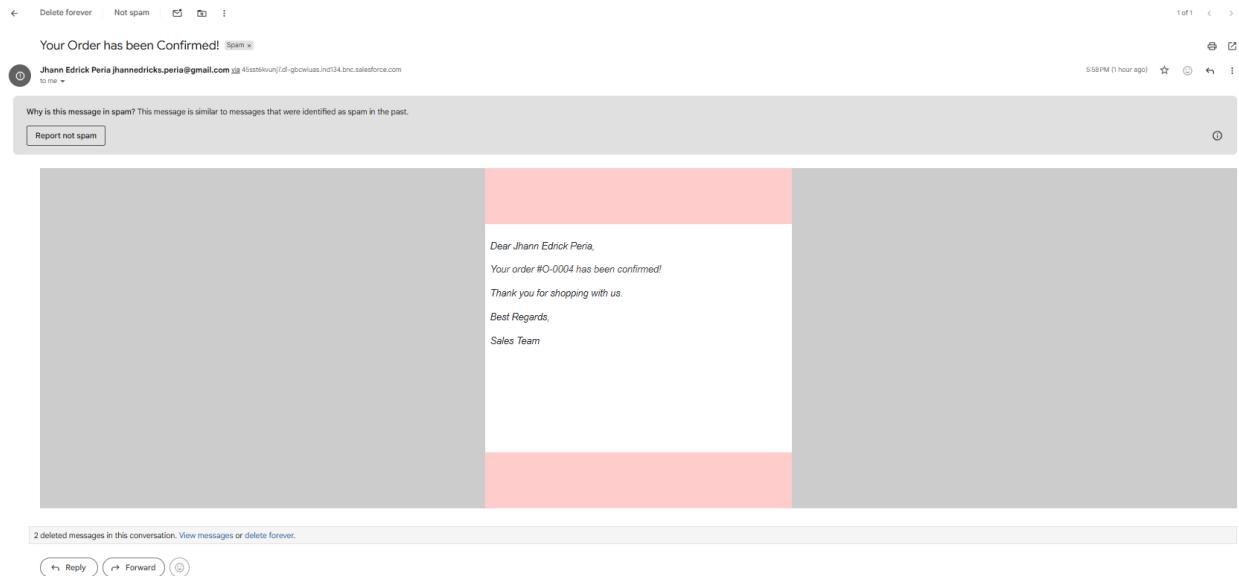


Figure 9. Order Confirmation Email Sent to Customer

The screenshot shows the "HandsMen Products" list in the Salesforce application. The navigation bar includes "HandsMen Threads", "HandsMen Customers", "HandsMen Orders", "HandsMen Products", "Inventorys", "Marketing Campaigns", "Reports", "Dashboards", "Accounts", and "Contacts". The "HandsMen Products" tab is selected. The page title is "HandsMen Products" and there is a "Recently Viewed" section. The main content area displays a table with two items:

| HandsMen Product Name |
|-----------------------|
| 1 TShirt |
| 2 Hair Dye |

At the top right of the table are buttons for "New", "Import", "Change Owner", and "Assign Label". At the bottom right are various edit and delete icons.

Figure 10. HandsMen Product List

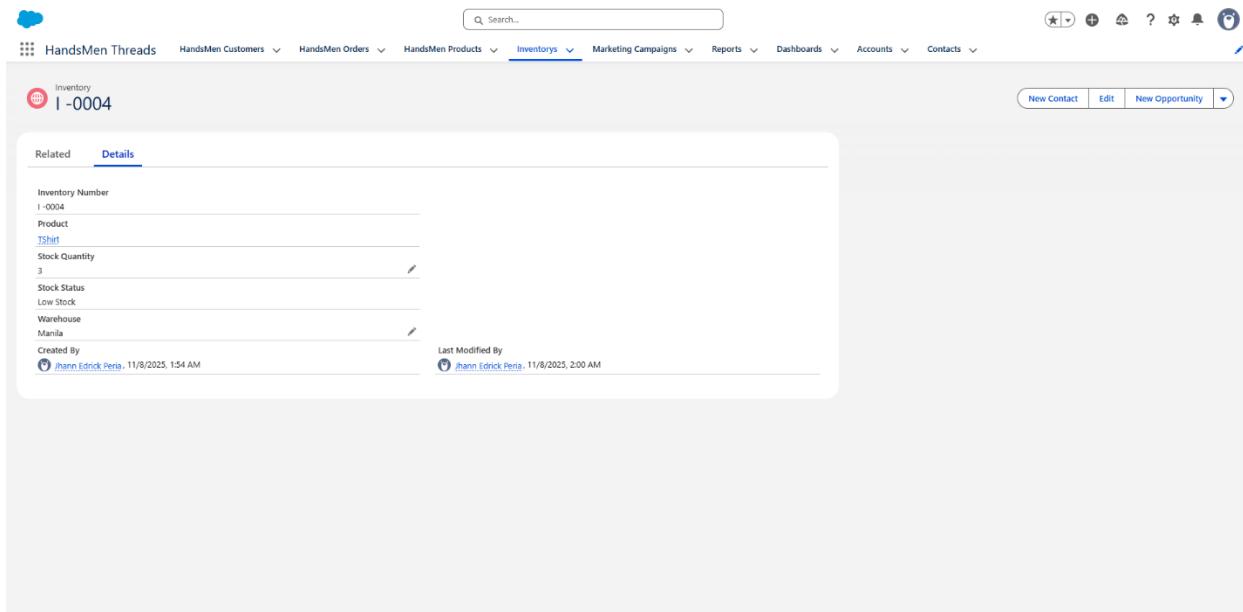


Figure 11. Inventory Creation

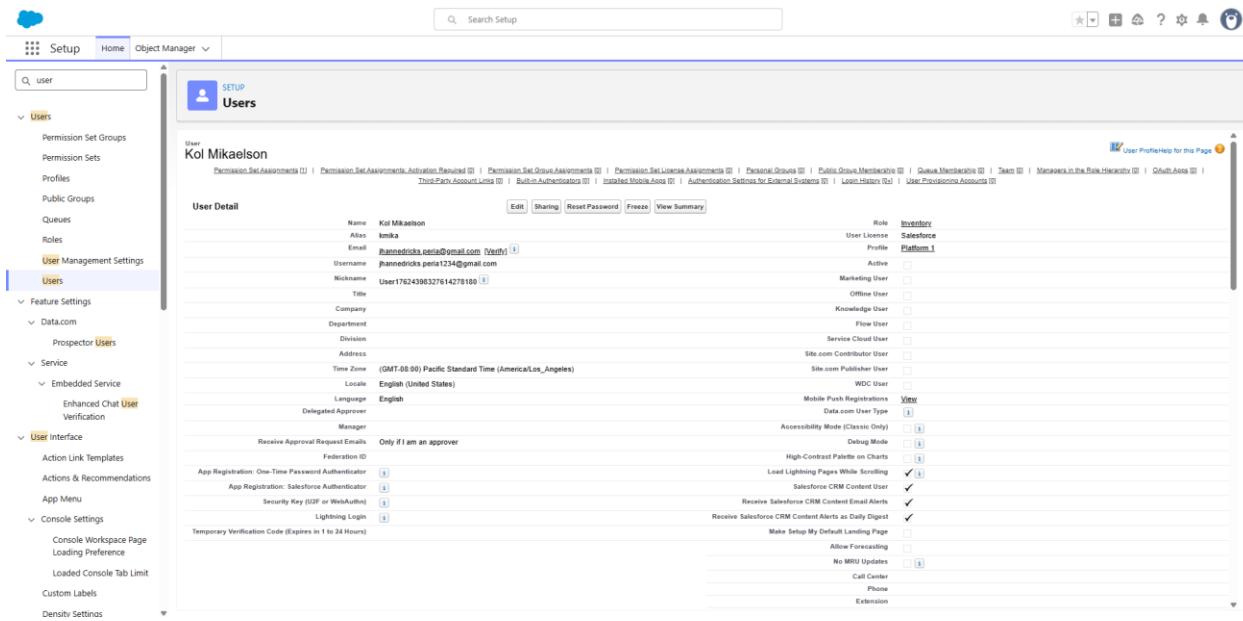


Figure 12. Kol Mikaelson User



Figure 13. Low Stock Alert Email

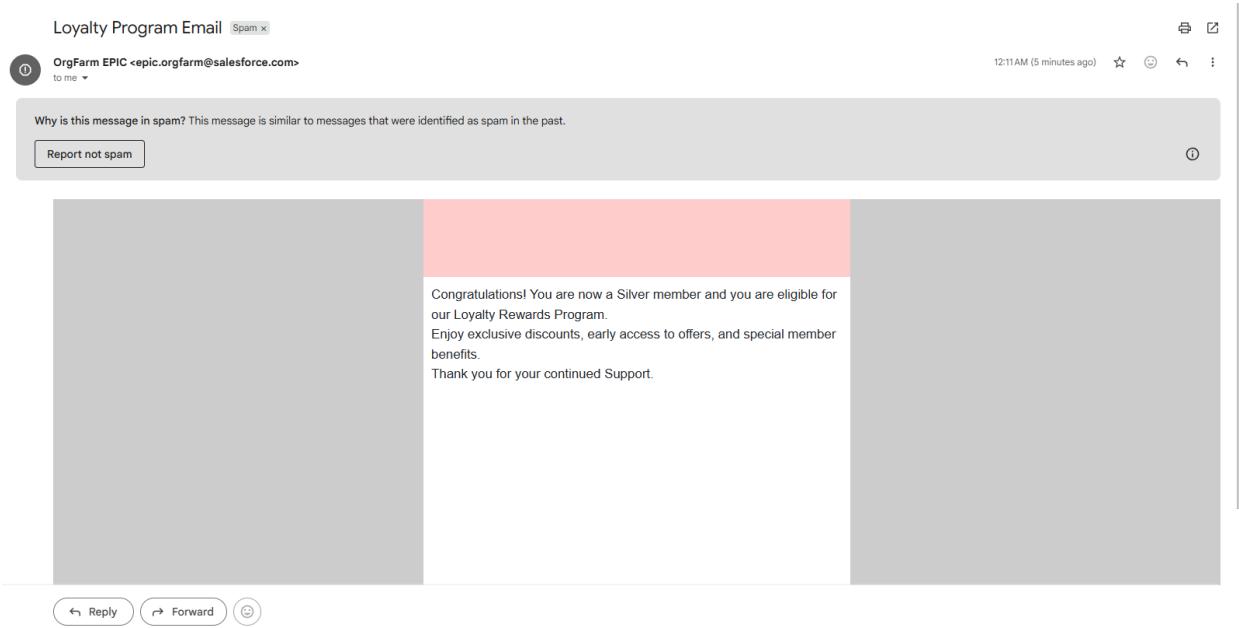


Figure 14. Loyalty Program Email.

CONCLUSION

The beginning of Salesforce CRM implementation at HandsMen Threads is a significant enhancement of the company's operational and customer management capabilities. The system encompasses core business capabilities, improves customer engagement and compliance, and captures a high level of accuracy for data across sales, inventories, and marketing functions. The project is a culmination in utilizing a combination of Salesforce functionality which included the custom objects, automated flows, validation rules, email notifications, Apex triggers, etc which developed an integrated intelligent platform strategy for the company's business management. The system will enable nearly real-time processing, improved data-driven, decision making, create a stable platform for scale and/or growth, enable service and long-term best practice capability to the organization. Finally, the HandsMen Threads CRM initiative establishes efficient operational processes, increases customer satisfaction, and qualifies the company to provide exceptional service and the personal touch to a customer's experience in a competitive marketplace.

FUTURE SCOPE

Salesforce CRM for HandsMen Threads establishes a good technological baseline for continuous improvement with additional tools to support efficiency, scalability, and engagement. Further development can occur in the two areas of technology: automation, accessibility, and analytics to further develop overall business practices and the user experience.

1. Smart Analytics and Predictive Dashboards:

The foresight of advanced data visualization and prediction dashboards would give management convenient insights into the trends of sales, inventory turnover, and customer patterns. Predictive analysis could also assist in predicting static demand, managing vendors to optimize stock, and informing marketing strategy.

2. Mobile App Extension:

Extending access to the platform by providing access on a dedicated Salesforce-branded mobile app would allow staff on the floor or field to view customer profiles, update on inventory, and place orders at their convenience, anywhere so long as they have their mobile device or tablet with them. Synchronizing data in real time between room-based technology and on-person technology is an attractive utility for engagement and efficiency.

3. Self-Service Customer and Loyalty Web Portal:

Implementing a customer web portal to allow clients to navigate their own profile, which could include, but not be limited to, tracking their own purchases, redeeming their loyalty points, or requesting assistance without engaging staff will strengthen trust and confidence in the work that store and volunteer staff are doing to motivate them toward repeat visit.

4. Messaging and Social Media Integration:

Incorporating messaging and social media into the system can significantly increase customer engagement. Such a connection between Salesforce and a messaging or social platform like Messenger or SMS would allow customers to receive real-time, transactional updates on their purchases, promotions, and customized offers. Overall, the goal is to create smooth, engaging, and entertaining experiences for customers and merchants alike.

5. AI-Driven Personalization (Salesforce Einstein):

Integrating Salesforce Einstein AI into the platform will allow the system to display more intelligently recommended items, project purchasing behavior, and personalize marketing campaigns based on past history. The goal would be to improve customer satisfaction through personalized messaging such as ChatBot and enhance data feedback such as currency exchange.

6. Workflow Automation and Process Optimization:

Continuation of automating repetitive business processes, such as follow-up emails, order confirmations and stock replenishment alerts would provide a more systematic approach to service delivery by streamlining processes and reducing manual intervention. This provides services to be provided faster and more consistently.

7. External System Integration:

By integrating external systems, connecting Salesforce to third party vendors, such as e-commerce systems or logistics applications, will create a more consolidated and diverse ecosystem that is more highly aligned on accurate data sharing and execution of operations across departments.

Submitted by:

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Date:

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