

HandsMenThreads: Elevating Men's Fashion with Salesforce

PROJECT OVERVIEW

This project involves the creation of a completely bespoke Salesforce CRM system for HandsMen Threads, a premium men's fashion brand. 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 functionality of the system includes customized objects, intelligent automation flows, precise validation rules, real-time email alerts, and custom Apex code – cohesively working together to improve customer satisfaction, efficiency and productivity within the sales function while eliminating stock problems, while providing a clear, data-driven picture of business performance. By integrating everything into one seamless system, HandsMen Threads now has more efficiency, consistency and visibility than ever in how the brand interacts with customers and how day-to-day operations are managed.

OBJECTIVE

The primary objective was to design and implement a customized Salesforce CRM solution for **HandsMen Threads** to enhance operational efficiency and elevate customer satisfaction.

In particular, the project sought to:

- Automate repetitive tasks such as order confirmation, loyalty tier management, and shortage tracking.
- Ensure accuracy and consistency in data entry through validation rules.
- Provide teams with instant insights into inventory balance, customer activity, and sales data.
- Improve coordination and communication between the sales, inventory, and marketing teams.
- Provide tailored experiences for customers through automated messaging and tracking for loyalty programs.

TECHNOLOGY DESCRIPTION

This section presents the technological components and Salesforce tools utilized in developing the **HandsMen Threads CRM System**. Each feature of the Salesforce platform was strategically configured to optimize business processes, ensure data integrity, and enhance user efficiency.

Salesforce Platform

The **Salesforce Platform** served as the foundation of the project, functioning as a cloud-based Customer Relationship Management (CRM) system that consolidates all customer-related operations. It provides an integrated environment equipped with tools for automation, marketing optimization, and sales management. The platform's intuitive drag-and-drop interface enabled efficient configuration of standard processes, while its advanced coding capabilities—such as **Apex** and **Flows**—allowed the implementation of complex business logic and automation.

Custom Objects

Custom Objects were created to serve as structured repositories for storing data specific to **HandsMen Threads** operations. These objects encapsulate unique business information and relationships, ensuring data consistency and accessibility:

- **HandsMen Customer_c:** Stores essential customer information such as personal details, contact data, and loyalty status.
- **HandsMen Product_c:** Maintains comprehensive 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 accurate inventory management.
- **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

A dedicated **Lightning App**, titled *HandsMen Threads*, was developed to integrate all system components into a unified workspace. This app serves as a centralized interface that combines essential tabs—such as *HandsMen Customers*, *HandsMen Orders*, *HandsMen Products*, *Inventorys*, *Marketing Campaign*, *Reports*, *Dashboards*, *Accounts*, and *Contacts*—to streamline workflow and enhance operational 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

Automated communication was facilitated through the use of **Email Templates** and **Email Alerts**:

- **Email Templates** ensure professional and standardized communication formats, such as order confirmations and loyalty updates.
- **Email Alerts** automatically notify customers or internal staff based on specific triggers, such as new orders or changes in loyalty status.

Flows

Salesforce Flows were utilized to automate complex processes through a visual, no-code interface. Key flows developed include:

1. **Order Confirmation Flow:** Automatically sends confirmation emails upon order creation.

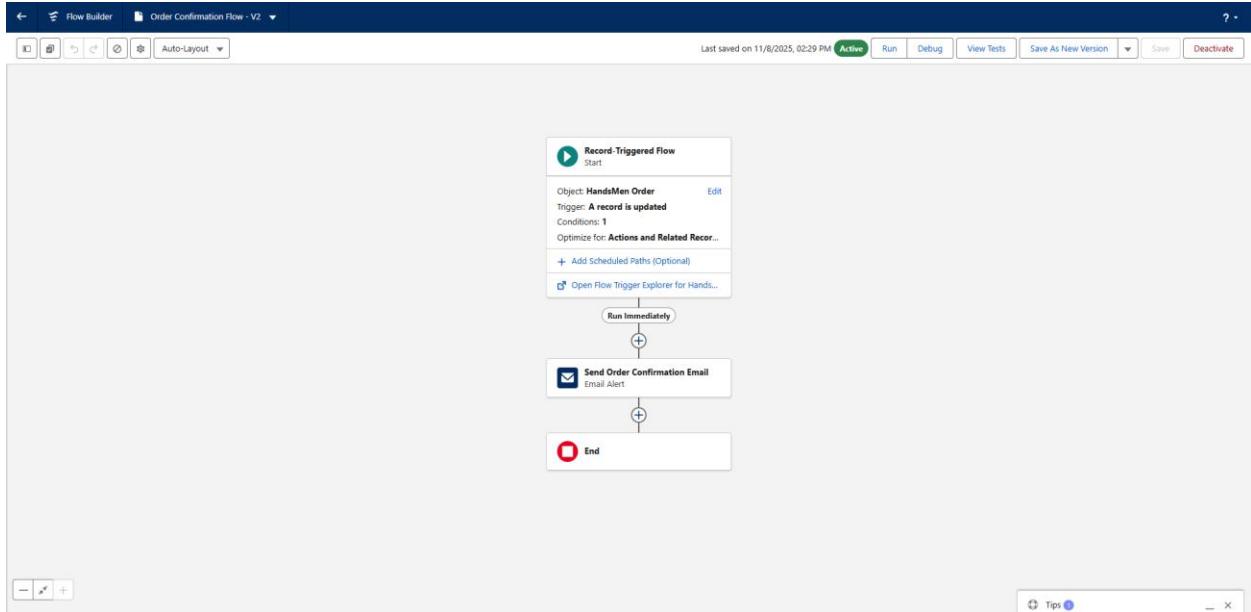


Figure 1. Order Confirmation Flow

2. **Stock Alert Flow:** Alerts when the quantity of the product drops below 5.

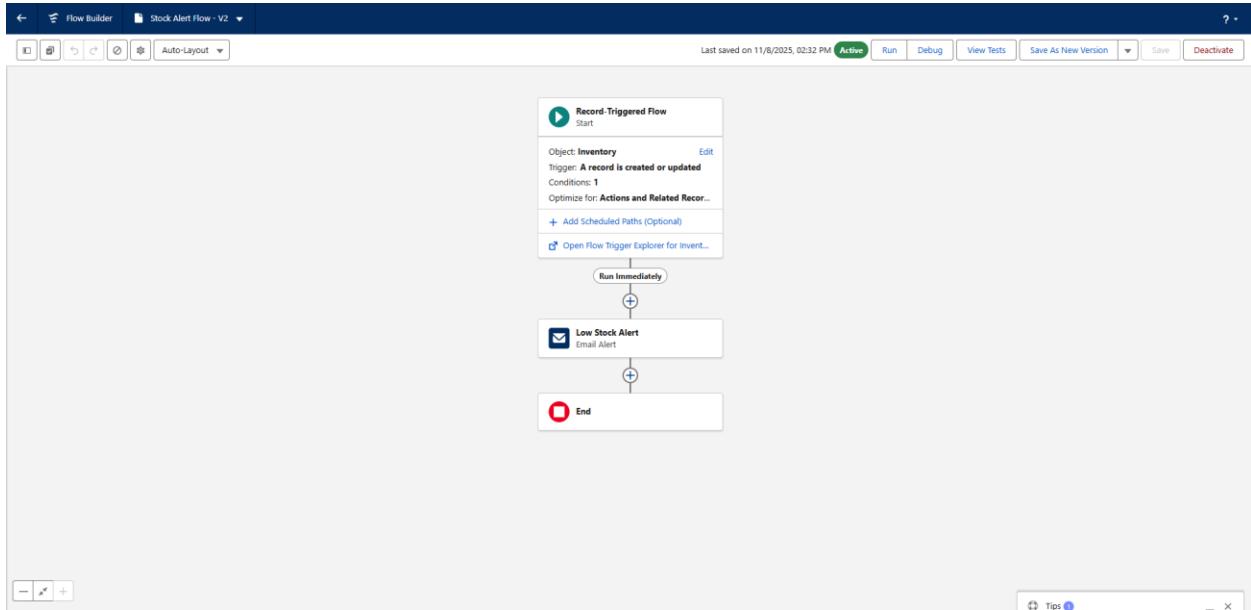


Figure 2. Stock Alert Flow

3. **Loyalty Status Update Flow:** Executes daily to recalculate and update customer loyalty status based on cumulative total purchases.

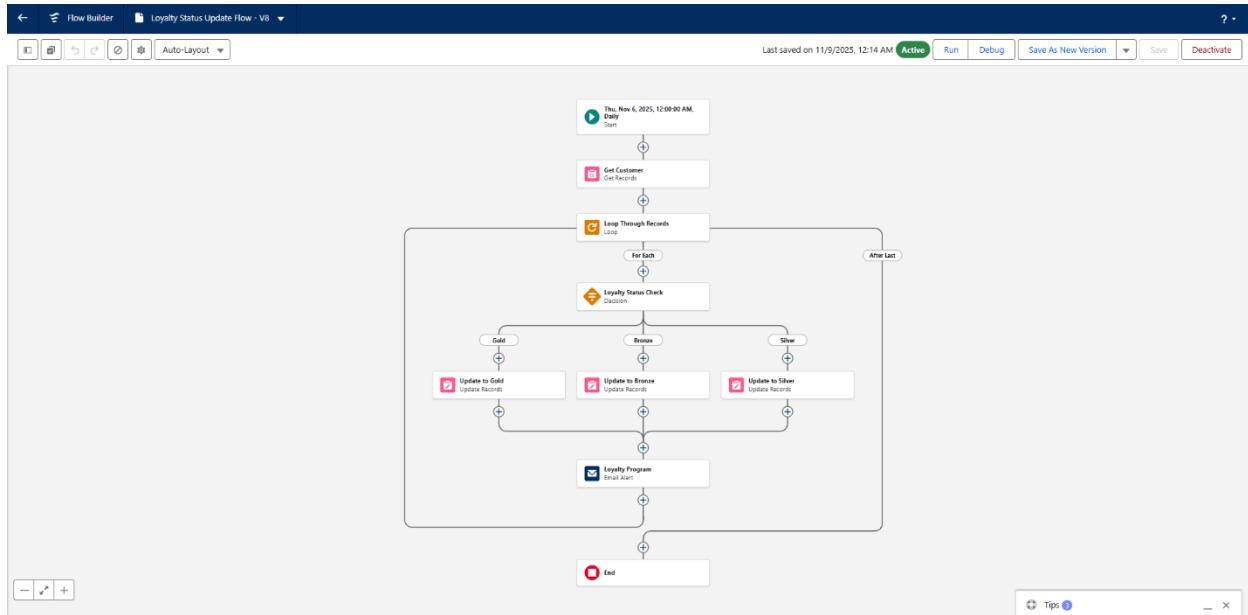


Figure 3. Loyalty Status Update Flow

Apex Programming

For advanced automation and logic beyond standard configurations, **Apex**, Salesforce's proprietary programming language, was employed. Custom triggers were developed to enforce business rules and automate calculations:

- **Order Total Trigger:** Automatically computes and updates the *Total_Amount__c* field based on quantity and unit price.
- **Stock Deduction Trigger:** Reduces product stock quantities upon order confirmation, ensuring accurate inventory management.
- **Loyalty Status Trigger:** Dynamically updates a customer's *Loyalty_Status__c* field in real time according to their total purchase history.

Through the strategic integration of these technologies, the **HandsMen Threads Salesforce CRM** successfully automated critical operations, improved data reliability, and strengthened cross-departmental coordination across sales, inventory, and marketing functions.

DETAILED PROJECT EXECUTION

1. Salesforce Developer Org Setup

A new Salesforce Developer Organization was established through <https://developer.salesforce.com/signup>. This served as the primary environment for all configuration, customization, and development activities throughout the project.

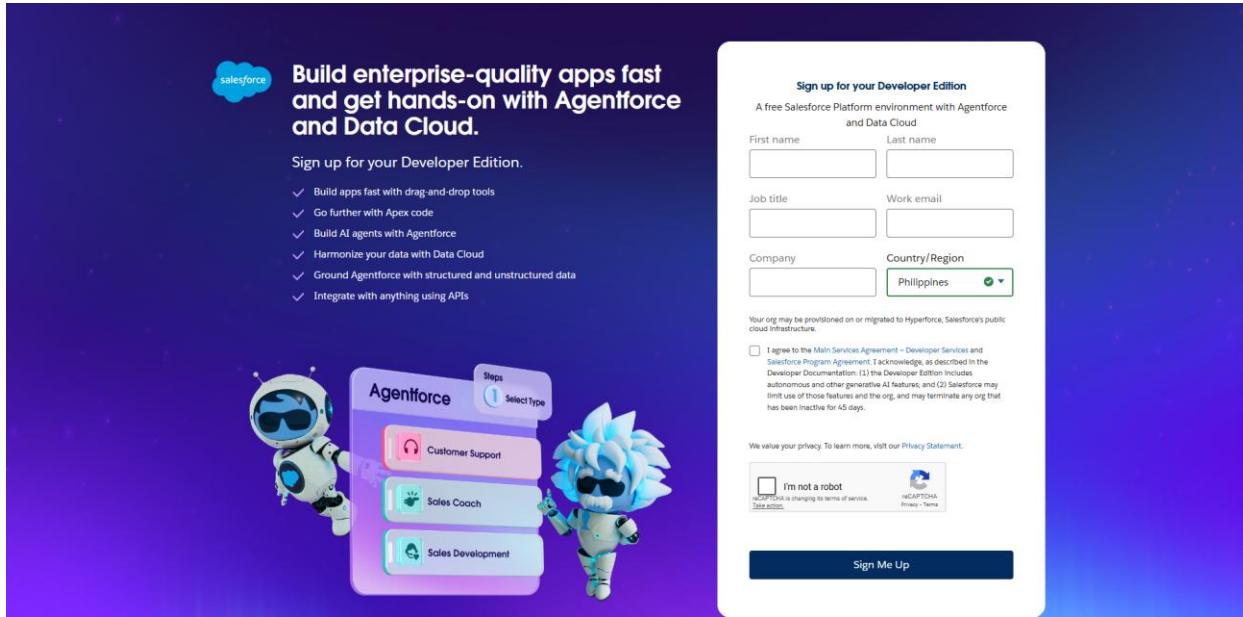


Figure 4. Salesforce Developer Edition Sign up

2. Custom Object Creation

The core data structure of the system was developed by creating several **custom objects** and their corresponding fields to efficiently store, organize, and manage essential business information:

- **HandsMen Customer (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 (Product__c)** – Maintains the product catalog containing *Name (Record Name)*, *SKU (Text)*, *Price (Currency)*, and *Stock_Quantity__c* (*Number*).
- **HandsMen Order (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).

Additionally, relationships were configured among these objects to establish data connections and dependencies:

- A **Lookup Relationship** was created between *Marketing Campaign* and *HandsMen Customer* to link campaigns to specific customers.
- A **Lookup Relationship** was created between *HandsMen Product* and *HandsMen Order* to associate products with customer orders.
- A **Lookup Relationship** was created between *HandsMen Order* and *HandsMen Customer* to connect each order to its corresponding customer.
- A **Master-Detail Relationship** was created between *Inventory* and *HandsMen Product* to ensure each inventory record is directly tied to a product.

Formula fields were also added to automate computations and enhance data accuracy:

- **Inventory__c → Stock_Status__c (Text):**
IF(Stock_Quantity__c > 10, "Available", "Low Stock")
- This displays stock availability status.
- **HandsMen Customer__c → Full_Name__c (Text):**
FirstName__c + " " + LastName__c
- This automatically combines the customer's first and last names into a single full name field.

3. Custom Lightning Application

A **custom Lightning App** titled “*HandsMen Threads*” was developed. This centralized platform consolidates all essential tabs—*HandsMen Customers*, *HandsMen Orders*, *HandsMen Products*, *Inventorys*, *Marketing Campaign*, *Reports*, *Dashboards*, *Accounts*, and *Contacts* —providing an integrated and user-friendly workspace for operational efficiency.



Figure 5. Lighning App Tabs

4. Validation Rules

Validation rules were established to maintain data accuracy, consistency, and integrity across all custom objects. These rules ensure that only valid and meaningful data is stored in the system:

- **HandsMen Order (Order_c)** – Prevents the entry of invalid order amounts by ensuring that *Total_Amount_c* cannot be less than or equal to zero.
Formula: $\text{Total_Amount_c} \leq 0$
- **Inventory (Inventory_c)** – Ensures accurate stock management by preventing the recording of negative or zero values in *Stock_Quantity_c*.
Formula: $\text{Stock_Quantity_c} \leq 0$
- **HandsMen Customer (Customer_c)** – Maintains a standardized email format by requiring all customer email addresses to include “@gmail.com.”
Formula: NOT(CONTAINS>Email, "@gmail.com"))

5. User Profiles and Roles

Distinct **profiles and roles** were configured to establish access control and ensure secure data management:

- **Profiles:** The “Standard User” profile was cloned and customized to create specialized profiles such as *Platform 1*.
- **Roles:** A role hierarchy was defined, including *Sales, Inventory, and Marketing*, to regulate data visibility and operational permissions based on organizational responsibilities.
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6. User Creation

New users were created and assigned to appropriate roles and profiles to simulate a multi-user system. For instance, *Niklaus Mikaelson* was assigned to the *Sales* role, while *Kol Mikaelson* was assigned to *Inventory Management*.

The screenshot shows the Salesforce Setup interface. The main title is "SETUP Users". The user profile for "Niklaus Mikaelson" is displayed, including fields like Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Delegated Approver, Manager, and several checkboxes for permissions such as 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, Load Lightning Pages While Scrolling, Receive Salesforce CRM Content Email Alerts, Receive Salesforce CRM Content Alerts as Daily Digest, Make Setup My Default Landing Page, Allow Forecasting, No MRO Updates, Call Center, Phone, and Extension.

Figure 6.Niklaus Mikaeslon User Account

7. Email Templates

Custom **email templates** were developed to ensure consistent and automated communication. Examples include:

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

8. Flow Implementations

Several **Salesforce Flows** were automated to streamline processes and reduce manual intervention:

- Order Confirmation Flow (Record-Triggered):** Sends an order confirmation email to the customer upon creation of a new order.
- Stock Alert Flow (Record-Triggered):** Alerts when the product quantity drops below 5.
- Loyalty Status Update Flow (Scheduled-Triggered):** Executes daily to refresh customer loyalty status based on accumulated purchase totals.

9. Apex Triggers

Apex triggers were implemented to automate key processes within the Salesforce environment, ensuring accurate calculations and real-time data synchronization between related records.

- **a. Order Total Trigger (OrderTotalTrigger):**
This trigger automatically calculates and updates the *Total_Amount_c* field in the **HandsMen Order (HandsMen_Order_c)** object before a record is inserted or updated. It retrieves the corresponding product's *Price_c* from **HandsMen Product (HandsMen_Product_c)** and multiplies it by the entered *Quantity_c* to compute the total order amount. This automation eliminates manual computation and ensures transactional accuracy.
- **b. Stock Deduction Trigger (StockDeductionTrigger):**
This trigger is executed **after** an order is inserted or updated. When an order's *Status_c* is set to "Confirmed," it locates the associated inventory record in **Inventory (Inventory_c)** and deducts the ordered quantity (*Quantity_c*) from the *Stock_Quantity_c* field. This ensures that inventory levels are automatically and accurately adjusted in real time after every confirmed order.

PROJECT DEMONSTRATION: Real-World Application

To illustrate the system's functionality, the following scenario demonstrates a complete customer transaction cycle within *HandsMen Threads*.

1. Customer Registration

A new customer, *Jhann Edrick Peria*, visits the store.

The sales representative accesses the *HandsMen Customer* tab and selects **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 email entered does not include "@gmail.com" (e.g., *jhannedricks.peria.9@microsoft.com*), the system automatically displays an error message: "*Please enter a valid Gmail address.*"

Once corrected, *Jhann Edrick Peria* is successfully registered in the system.

2. Product Setup

The inventory manager ensures all product information is properly listed under *HandsMen Product*.

For example, "*TShirt*" is listed at **\$100** with **100 units** in stock.

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:** Upon saving, the *OrderTotalTrigger* automatically calculates and updates *Total_Amount_c* to **\$1000** ($10 \times \100).
- **Flow in Action:** The *Email Notification Flow* immediately sends *Jhann Edrick Peria* an order confirmation email summarizing the 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

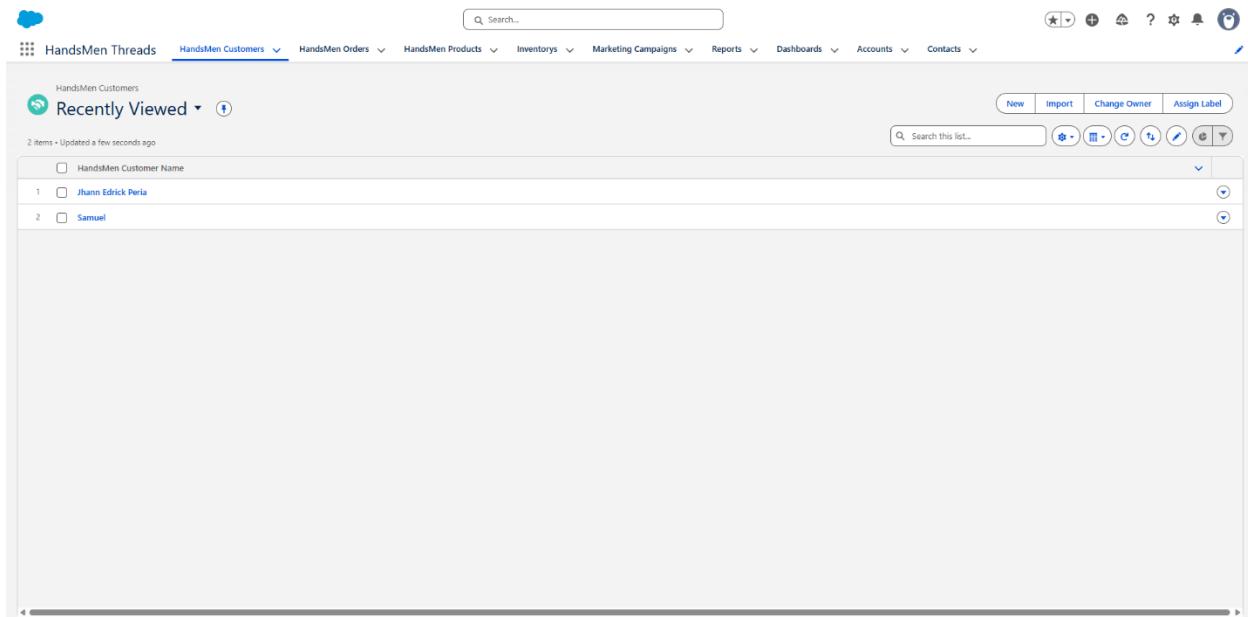


Figure 7. Custom Lightning App for HandMen Threads.

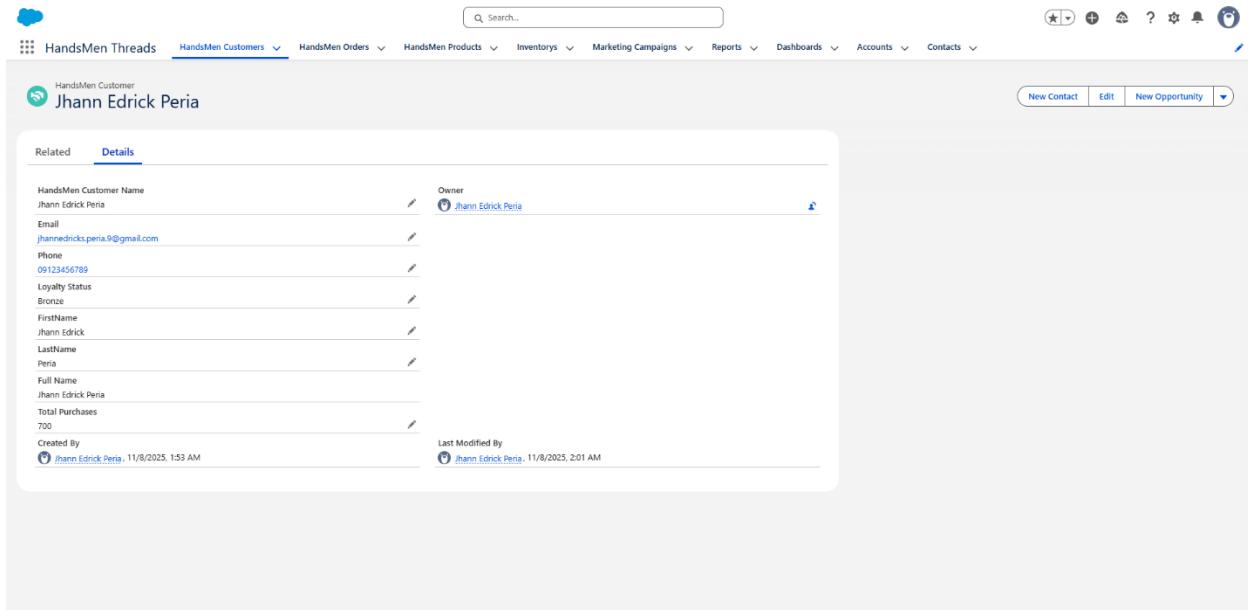


Figure 8. Customer Creation in HandsMen Threads

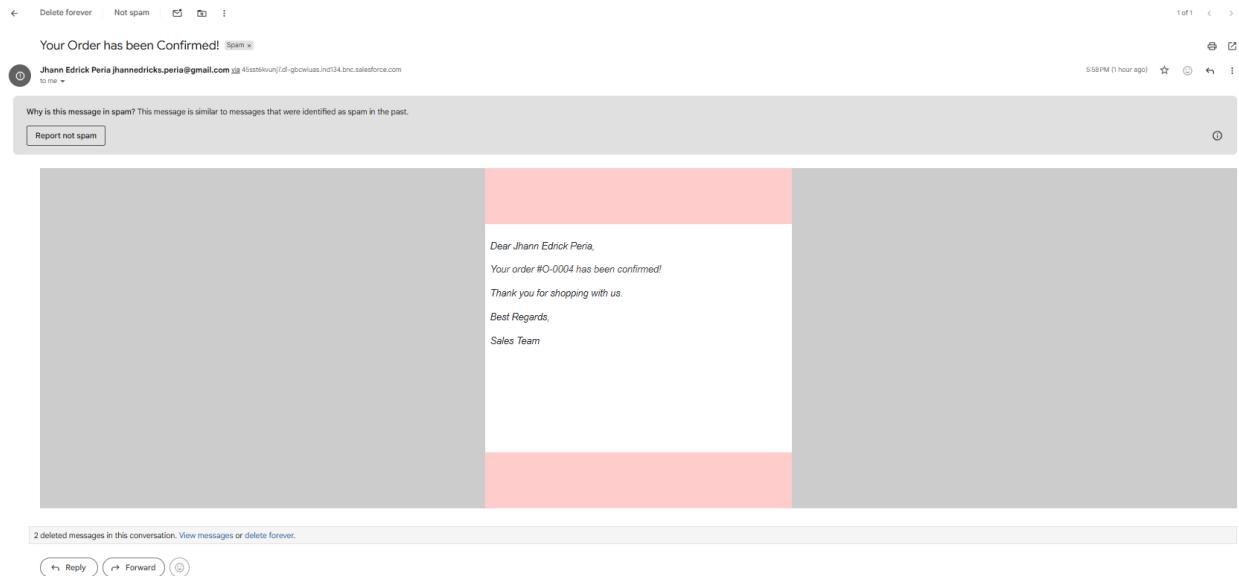


Figure 9. Order Confirmation Email Sent to Customer

The screenshot shows a product management interface for "HandsMen Threads". The top navigation bar includes links for "HandsMen Customers", "HandsMen Orders", "HandsMen Products" (which is the active tab), "Inventorys", "Marketing Campaigns", "Reports", "Dashboards", "Accounts", and "Contacts".

The main content area displays a "Recently Viewed" section with two items: "Tshirt" and "Hair Dye". A search bar labeled "Search..." is located above the product list. To the right of the list are buttons for "New", "Import", "Change Owner", and "Assign Label". Below the list is another search bar labeled "Search this list..." and a set of filter and sort icons.

Figure 10. HandsMen Product List

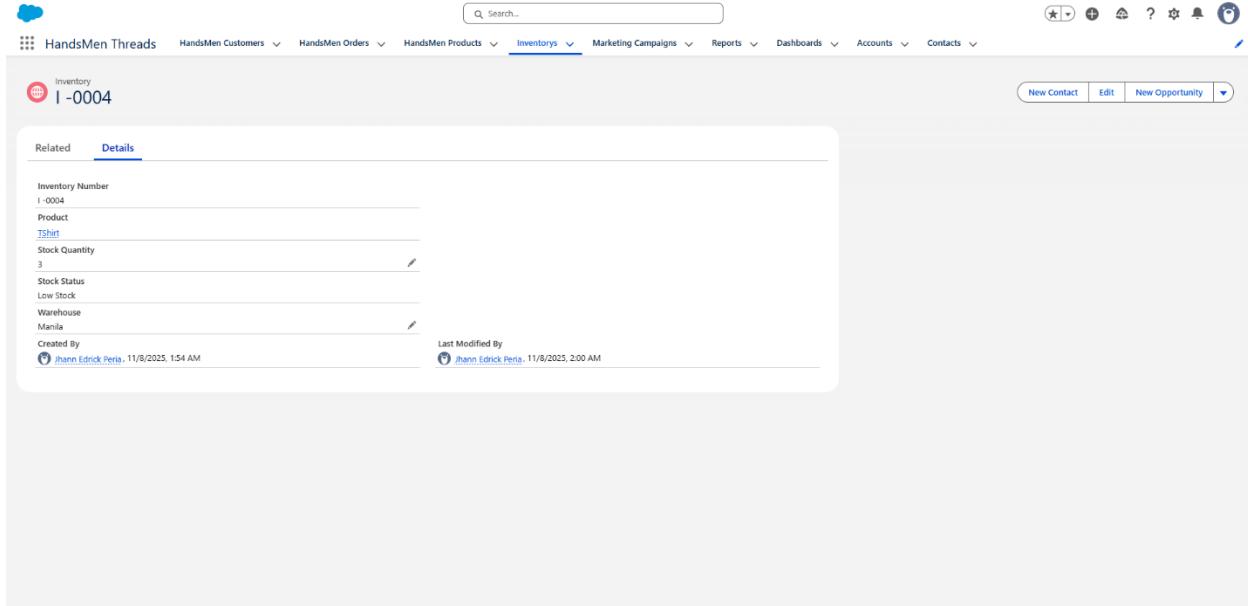


Figure 11. Inventory Creation

Figure 12. Kol Mikaelson User



Figure 13. Low Stock Alert Email

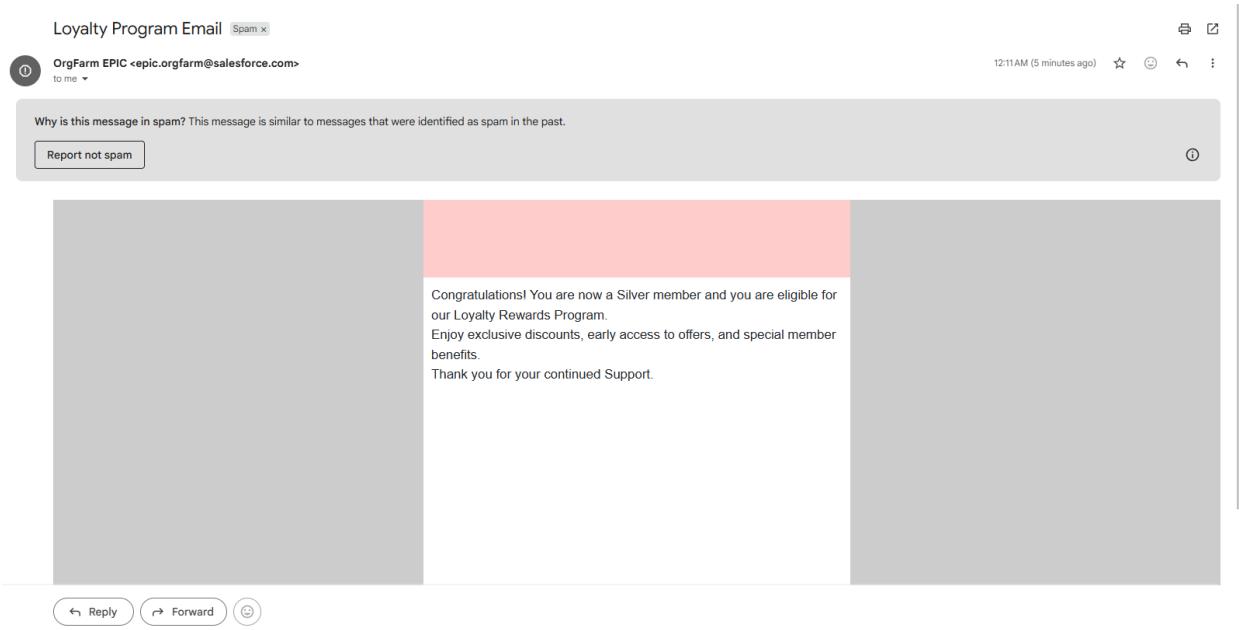


Figure 14. Loyalty Program Email.

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. Customer Self-Service and Loyalty Portal:

Implementing a customer web portal to allow clients to navigate their own profile, which could include, but not 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 visits.

4. Messaging and Social Media Integration:

Linking Salesforce to communication options like WhatsApp, Messenger, or SMS, would afford real time order tracking, promotional alerts, and customized deals, producing a more vibrant and immediate engagement with customers.

5. AI-Driven Personalization (Salesforce Einstein):

By utilizing Salesforce Einstein AI, the platform can showcase intelligently proposed items, project buying patterns, and customize marketing initiatives based on historical data. It should ultimately increase conversion rates and enhance customer satisfaction through personalized communication.

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 offers services to be provided faster and more consistently.

7. Integration with External Systems:

Connecting Salesforce to third-party vendors such as accounting software, e-commerce systems, or logistics applications, would provide a more compact ecosystem that is a higher degree aligned in terms of accurate data and deployment of operations between departments.

8. Cloud-Based Data Expansion and Security:

As we look toward the next generation of Salesforce it may be possible to improve cloud storage, encryption, and backup solutions robustly to enhance scalability and data protection during a period of growth and expanded transaction volumes.

Submitted by:

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Date:

November 9, 2025