

HandsMen Threads

Elevating the Art of Sophistication in Men's Fashion

ABSTRACT

This project presents a comprehensive approach to implementing a customized Salesforce CRM solution for **HandsMen Threads**, a premium men's fashion and tailoring brand. In an increasingly competitive retail landscape, brands must go beyond product offerings and build streamlined, intelligent, and responsive systems that elevate operational efficiency and customer satisfaction. The primary objective of this implementation is to optimize internal workflows, enhance customer engagement, and ensure data consistency and security across all key departments, including sales, inventory, and marketing.

At the core of this solution lies a robust and scalable data model, carefully designed to support five major custom objects—Customer, Order, Product, Inventory, and Marketing Campaign. These objects form the backbone of the CRM system, enabling the brand to manage end-to-end business operations with precision. To ensure operational fluidity and responsiveness, critical business processes such as order confirmations, loyalty program management, and stock level monitoring have been automated using Salesforce features like Record-Triggered Flows, Scheduled Flows, Email Alerts, and Apex Classes. These automations not only reduce manual effort but also deliver a faster, more consistent experience for both customers and internal teams.

To uphold data integrity and prevent inconsistencies, the system enforces validation rules across all user inputs and record updates. A meticulously designed role-based access model restricts sensitive information to authorized users within the Sales, Inventory, and Marketing departments—improving both collaboration and security. Moreover, a scheduled Apex batch job was implemented to proactively track and update low-stock inventory levels, ensuring that stock-outs and overselling risks are minimized.

Ultimately, this end-to-end Salesforce CRM integration delivers significant value to **HandsMen Threads** by enabling personalized, timely communication with customers, increasing team productivity through automation, and creating a future-proof digital infrastructure. It lays a strong technological foundation for scaling operations, expanding market presence, and evolving customer strategies—positioning the brand as a leader in luxury men's fashion powered by intelligent digital systems.

OBJECTIVE

The main objective of this project is to design and implement a customized Salesforce CRM solution for **HandsMen Threads**, a premium men's fashion brand. The focus is on streamlining operations, maintaining data integrity, and enhancing the overall customer experience.

The project specifically aims to:

1. Automate essential business processes, including:

- Order confirmations
- Loyalty status notifications
- Low stock alerts

2. Ensure accurate and consistent data entry through the use of:

- Custom validation rules
- Error prevention mechanisms

3. Provide real-time visibility across:

- Inventory levels
- Customer interactions
- Sales performance

4. Improve internal team coordination by:

- Implementing role-based access control
- Assigning object-level permissions

5. Deliver personalized customer experiences using:

- Targeted communications
- Promotional campaigns
- Loyalty program flows

6. Support scalable growth with:

- A centralized and modular CRM structure
- Automation-ready architecture using Flows and Apex

7. Enhance marketing efficiency by:

- Creating, managing, and analyzing campaigns
- Using data-driven insights to target high-value customer segments

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 offers both point-and-click tools and programmatic capabilities (like Apex and Flows) to build tailored business solutions.

CUSTOM OBJECTS

Custom Objects in Salesforce are like **tables** in a **database**. They are created to **store** specific data relevant to a business.

Examples:

- Customer__c – Stores customer information
 - Product__c – Stores product details
 - Order__c – Stores order records
-

TABS

Tabs allow users to **access** and **manage object data** in the **Salesforce UI**.

Example:

A tab for Product__c enables users to easily view and manage product records.

CUSTOM APP

A **Custom App** in Salesforce is a group of **related tabs, objects, and components** designed to serve a **specific business purpose** or function.

It helps users focus on their work by providing a **centralized workspace** that includes everything they need—such as **custom objects, reports, dashboards**, and other tools relevant to their role.

Example:

A **Customer Support App** might include tabs like Cases, Contacts, FAQs, and a dashboard showing open ticket trends.

PROFILES

Profiles define what a user can **view**, **do**, and **edit** in Salesforce. They control:

- Object permissions
 - Field-level access
 - User interface visibility
-

ROLES

Roles manage **data visibility** in Salesforce's role hierarchy. They are primarily used for:

- Sharing settings
 - Report visibility
-

PERMISSION SETS

Permission Sets provide **additional permissions** to users **without changing their existing profiles**. They offer a flexible way to manage access without creating multiple profiles.

- Used to **extend access** for specific users.
- **Multiple permission sets** can be assigned to a single user.
- Helps in **maintaining security** while avoiding profile duplication.

Example:

If a user needs access to a custom object temporarily, assign a permission set instead of modifying their profile.

VALIDATION RULES

Validation Rules ensure that data entered meets specific business criteria.

Examples:

- Email must contain @gmail.com
- Stock quantity cannot be negative

EMAIL TEMPLATES

Predefined **templates** used for sending **standardized emails** to customers or users.

Example:

Order Confirmation email template.

EMAIL ALERTS

Email Alerts are **automated actions** in **Flows** or **Workflow Rules** that send emails using predefined templates.

Example:

When a customer's loyalty level changes, a confirmation email is automatically sent.

FLOWS

Flows automate **business logic** without requiring code. They can:

- Create or update records
- Send notifications

Example:

A flow that triggers an email alert when a new order is placed.

Apex

Apex is Salesforce's **object-oriented** programming language. It allows developers to implement custom business logic.

Example Triggers:

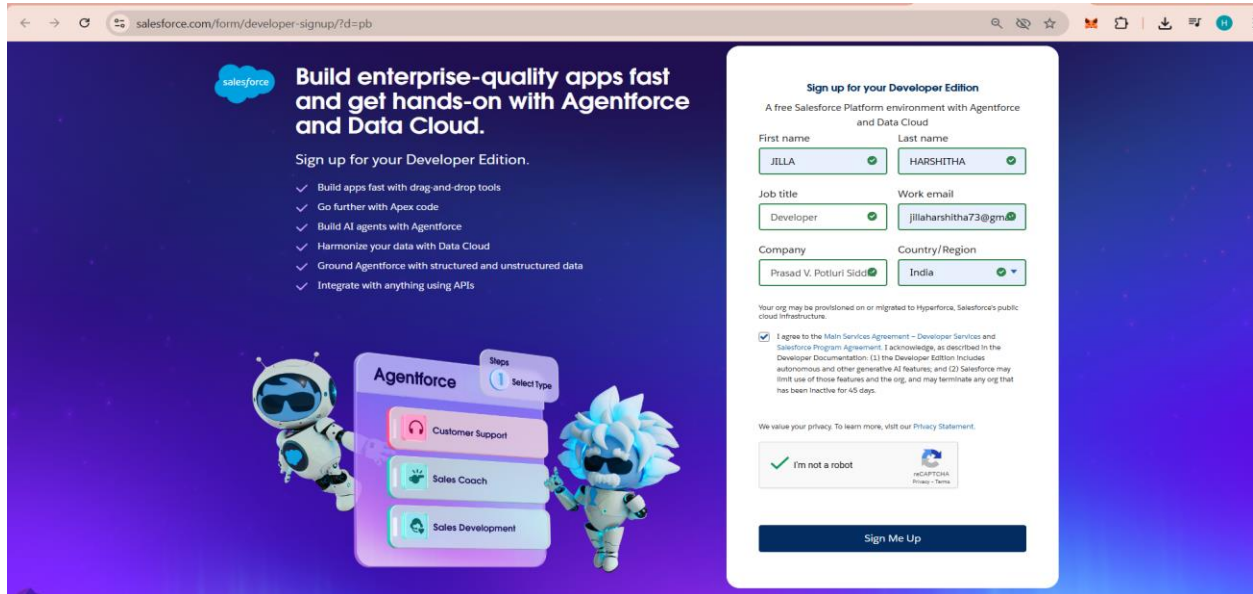
- Update Total_Amount__c in Orders
- Reduce inventory stock after a purchase

DETAILED EXECUTION OF PROJECT PHASES

PROJECT PHASES

1. DEVELOPER ORG SETUP

- Created a Salesforce Developer Org using <https://developer.salesforce.com/signup>.
- Verified the account, set the password, and gained access to the Salesforce Setup page.



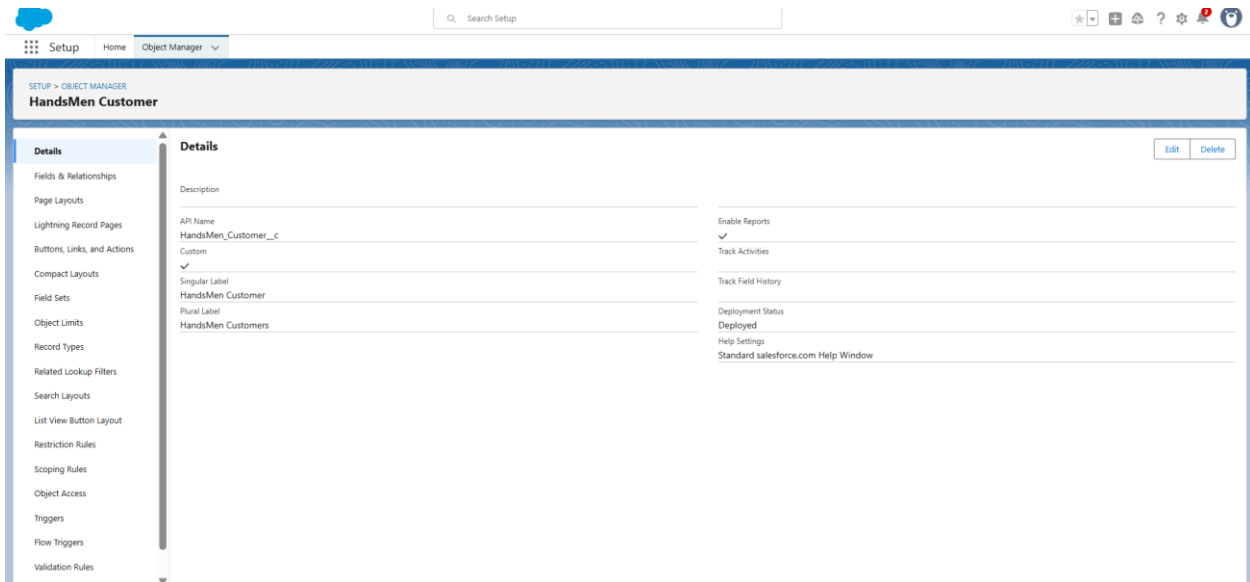
2. CUSTOM OBJECT CREATION

Five custom objects were created to store business-critical data:

- **Customer** – Stores customer information such as email, phone, and loyalty status.
- **Product** – Stores product catalog details like SKU, price, and stock.
- **Order** – Stores orders placed by customers, including quantity and status.
- **Inventory** – Tracks stock quantities 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

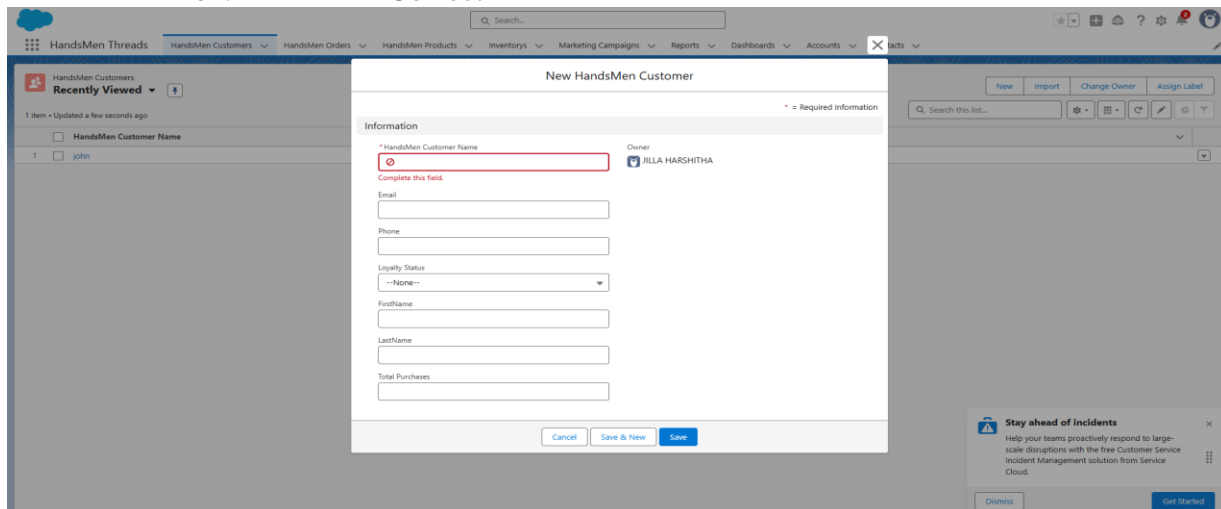
A custom Lightning App named Threads was created.

- Included tabs: 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"



5. USER ROLE & PROFILE SETUP

Cloned the Standard User profile to a new profile named Platform 1 and added access to the necessary custom objects.

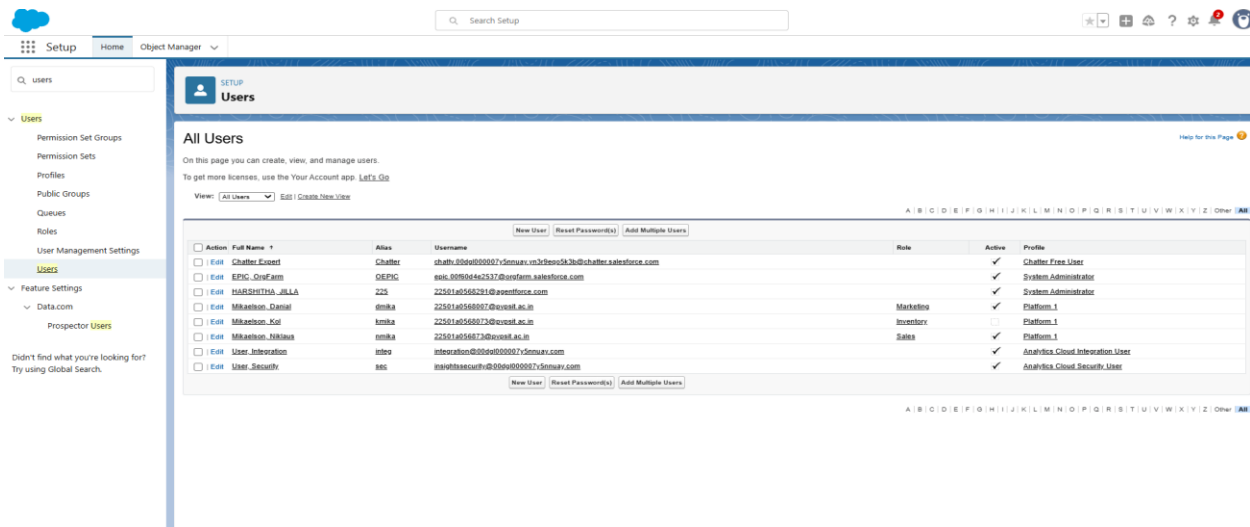
- Created roles for different departments:
 - Sales Manager
 - Inventory Manager
 - Marketing Team

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.



The screenshot shows the Salesforce Setup interface. On the left, the 'Setup' menu is open, and 'Users' is selected under 'User Management Settings'. The main area displays the 'All Users' page. At the top, there's a search bar and a 'Help for this Page' link. Below the header, there's a table of users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists several users, including Chatter, EPIC, HARSHTHA, Mikaelson, and User. The 'Role' column shows 'Marketing', 'Inventory', and 'Sales' for different users. The 'Active' column has checkboxes, and the 'Profile' column shows 'Platform 1' for several users.

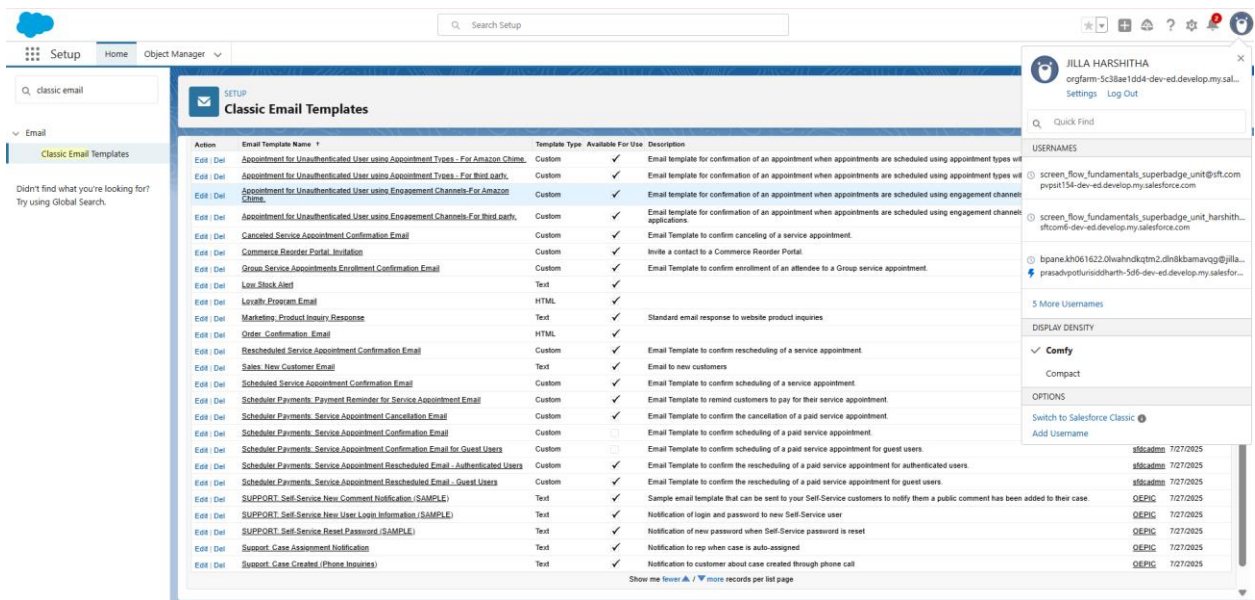
Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter, Chatter	Chatter	chatter_000000007@domain.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	EPIC, OneFarm	EPIC	epic.000000007@domain.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	HARSHTHA, JILLA	225	22501a566007@domain.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	Mikaelson, Daniel	dmka	22501a566007@domain.com	Marketing	<input checked="" type="checkbox"/>	Platform 1
<input type="checkbox"/> Edit	Mikaelson, Kol	kmka	22501a566007@domain.com	Inventory	<input checked="" type="checkbox"/>	Platform 1
<input type="checkbox"/> Edit	Mikaelson, Niklaus	nmka	22501a566007@domain.com	Sales	<input checked="" type="checkbox"/>	Platform 1
<input type="checkbox"/> Edit	User, Integration	intro	integration@000000007@domain.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User, Security	886	main@000000007@domain.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

7. EMAIL TEMPLATE & ALERTS

Created three email templates:

- **Order Confirmation** – Sent when order status is Confirmed
- **Low Stock Alert** – Sent when inventory is less than 5 units
- **Loyalty Program Email** – Sent when loyalty status changes

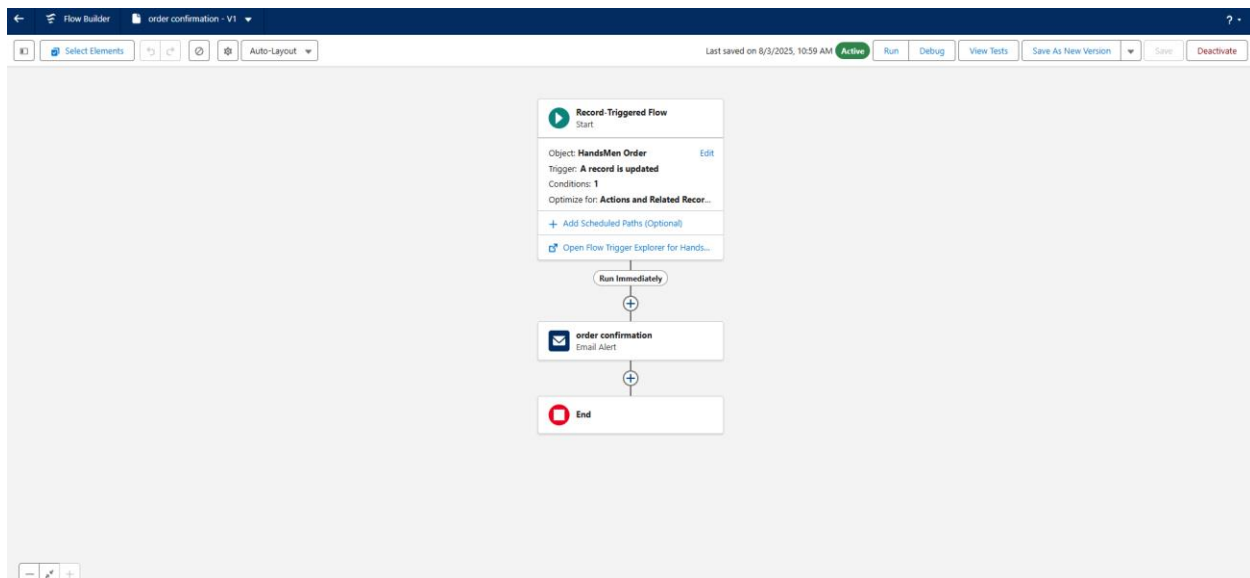
Corresponding email alerts were created using these templates and linked to automation flows.



8. FLOW IMPLEMENTATIONS

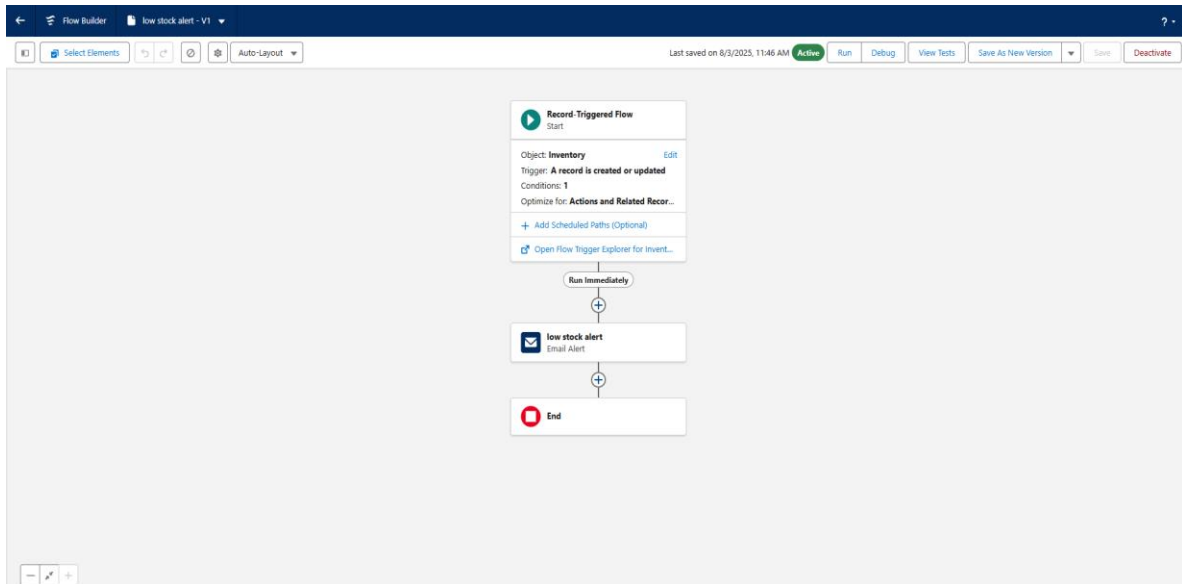
a. Order Confirmation Flow

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



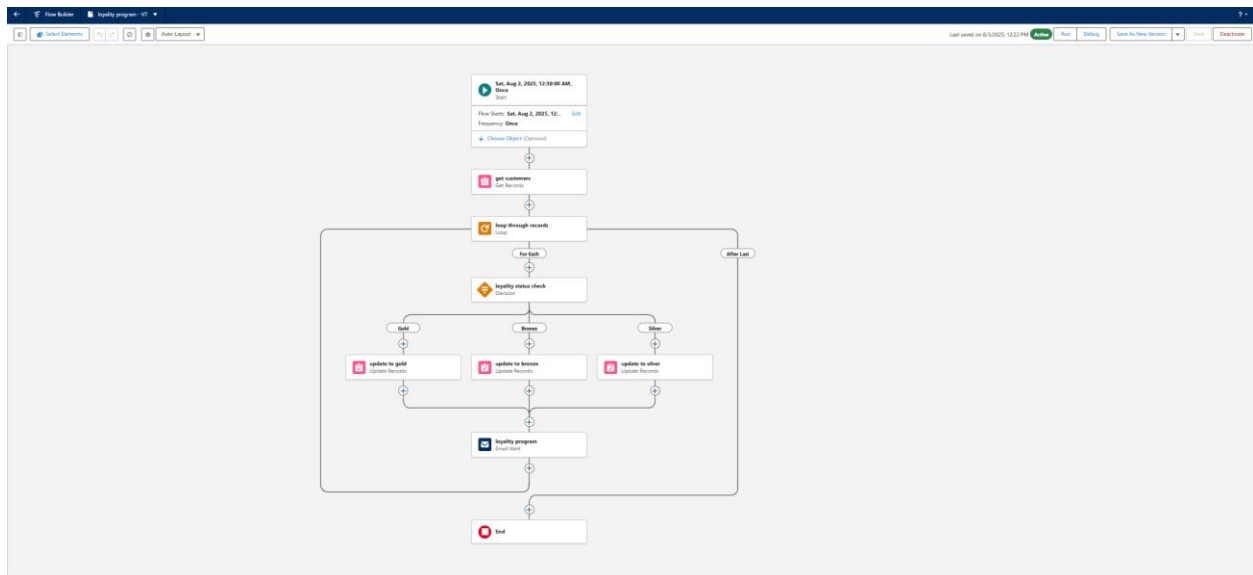
b. Stock Alert Flow

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



c. Scheduled Flow: Loyalty Update

- Runs daily at midnight
- Loops through customers and updates their loyalty status based on total purchases



9. 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 EXAMPLES

Let's walk through it like a real customer interaction.

1. Customer Registration

- Elijah Mikaelson visits the store or website.
- A record is created in the Customer object in Salesforce with name, phone, etc.
- Email validation rule: must contain "@gmail.com".

2. Product Setup

- Admin adds products (e.g., Shirts, Jeans) to Product__c object.
- Each product includes price and details.
- Inventory is created to manage stock.

3. Order Placement

- Elijah buys 2 shirts at ₹500 each.
- A new Order record is created in Salesforce.
- Apex Trigger calculates $\text{Total_Amount_c} = 2 \times 500 = ₹1000$.

4. Inventory Update

As soon as the order is placed:

- Apex Trigger reduces shirt stock by 2.
- Validation Rule ensures stock doesn't go below 0.

5. Loyalty Program

- Elijah's total purchase: ₹1000.
- Trigger on Customer checks total purchases.
- Membership tiers:
 - Below ₹500 → Bronze
 - ₹500 to ₹1000 → Silver
 - Above ₹1000 → Gold
- Elijah becomes a Silver member.

6. Email Notifications

- On new order or loyalty update:
- Flow + Email Alert is triggered.
- Elijah receives:
"Thanks for your purchase! Your loyalty status is now Silver."

7. Users and Roles

- Salesforce users created:
- **Niklaus Mikaelson** – Sales Role (Platform 1 Profile)
- **Kol Mikaelson** – Inventory Role (Platform 1 Profile)

SCREENSHOTS

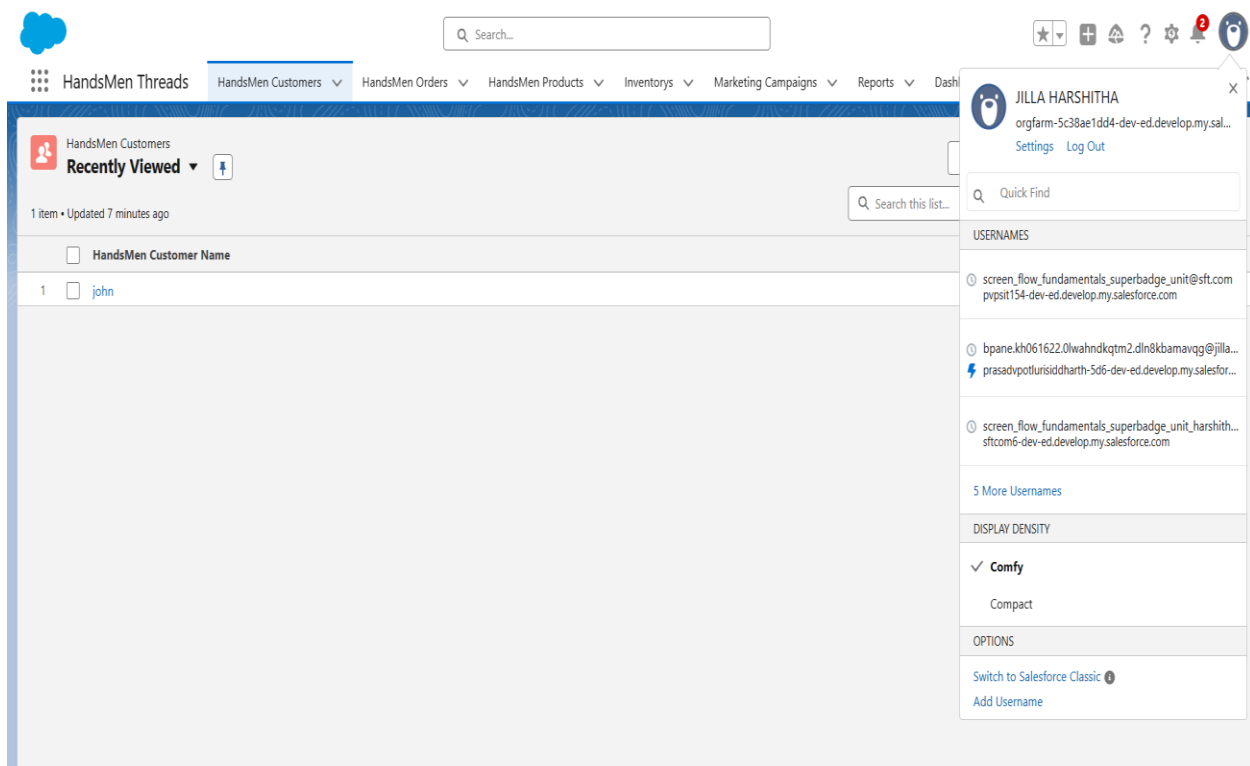


Fig: Custom App for HandsMen Threads

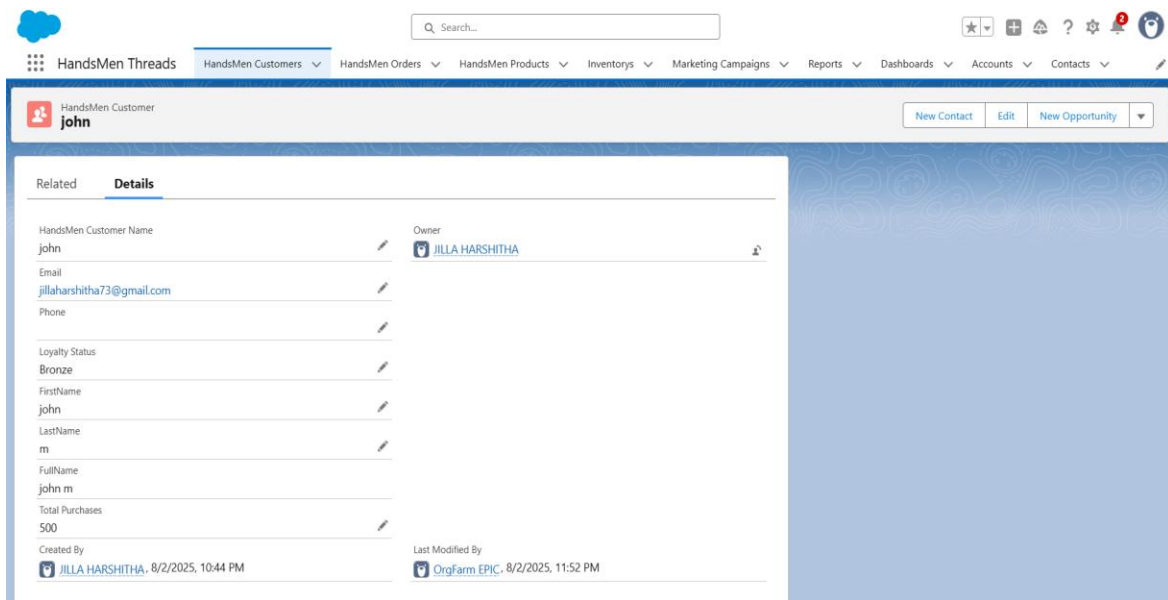


Fig: Customer Creation in HandsMen Threads

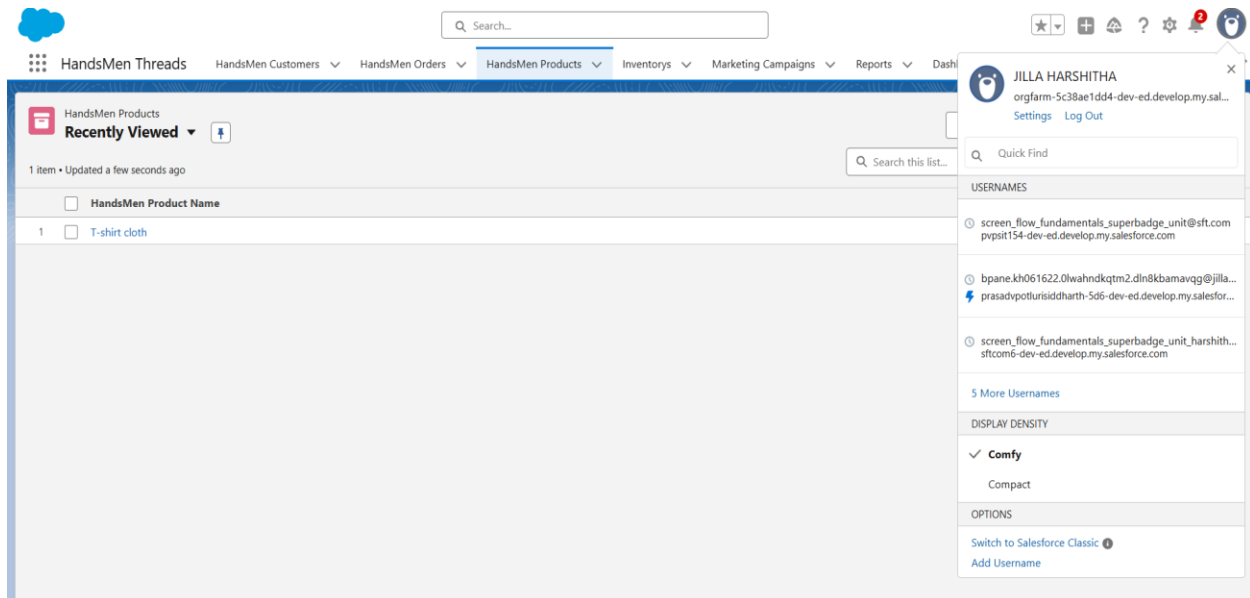


Fig: Products in HandsMen Threads

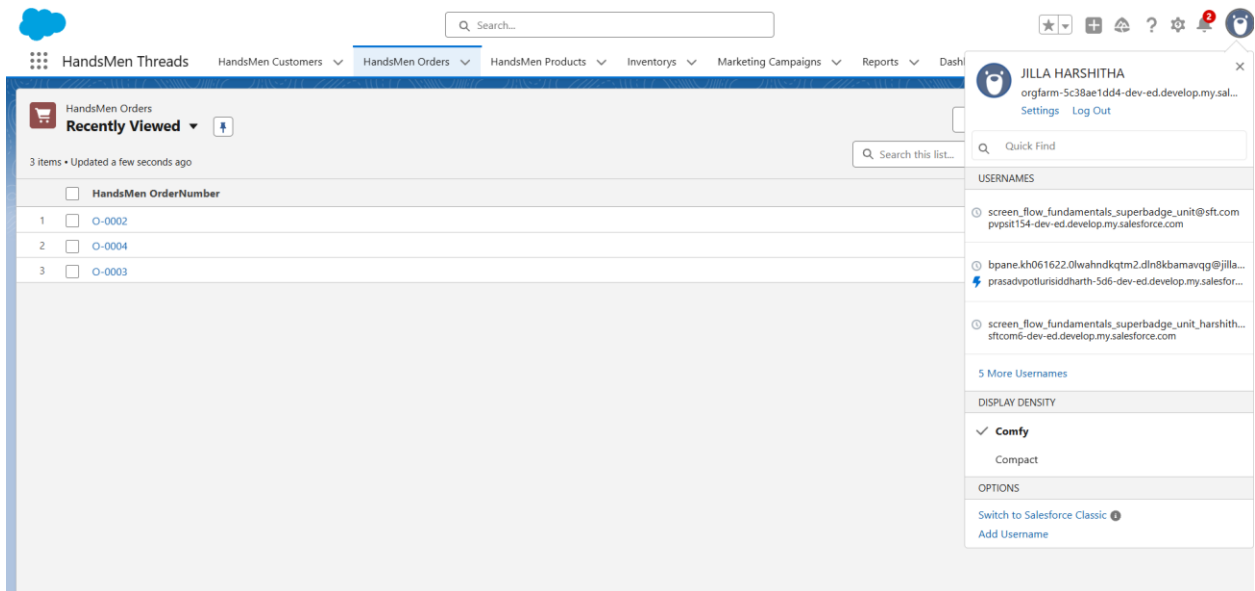


Fig: Orders in HandsMen Threads

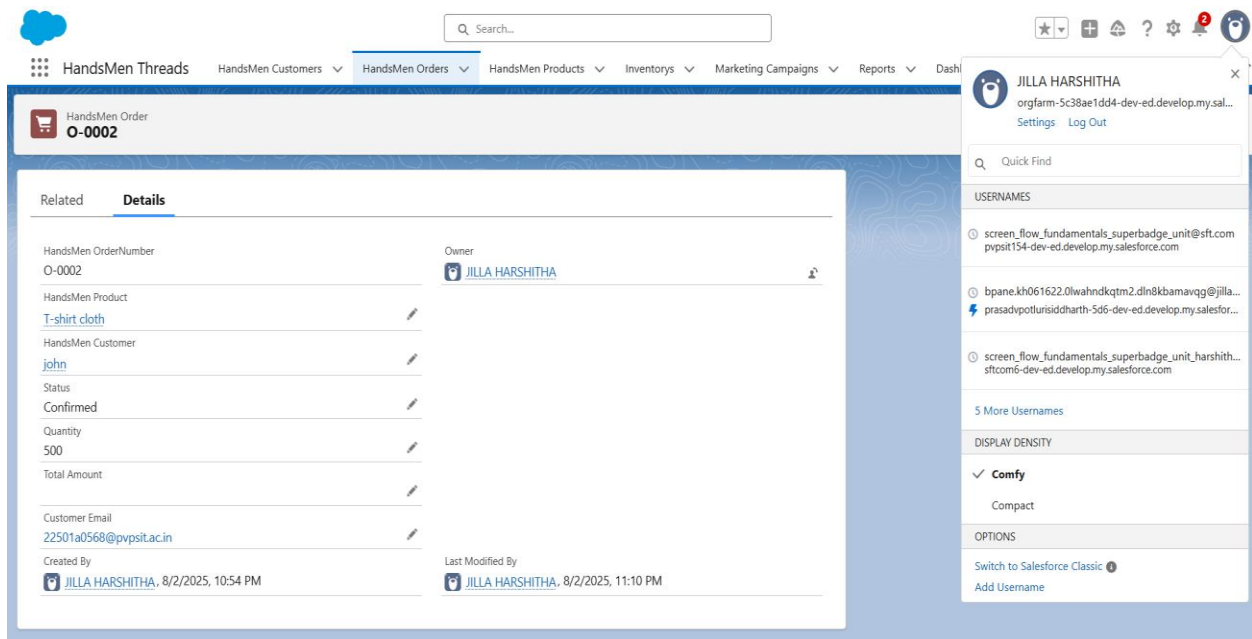


Fig: Orders Confirmation

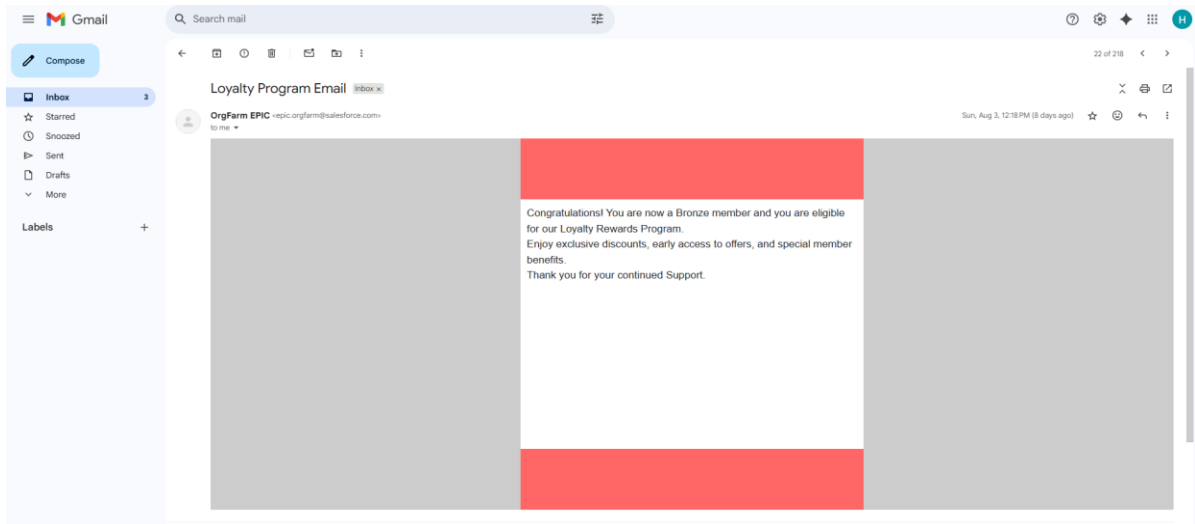


Fig: Loyalty Program Email

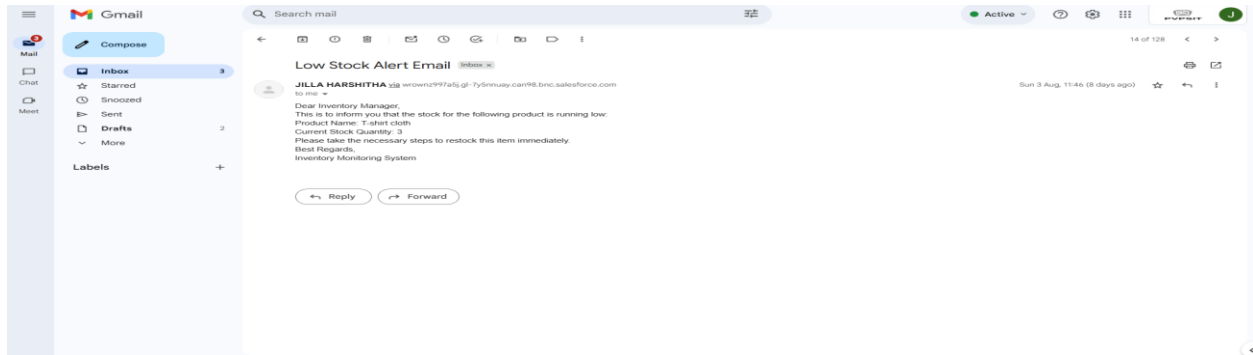


Fig: Low Stock Alert Email

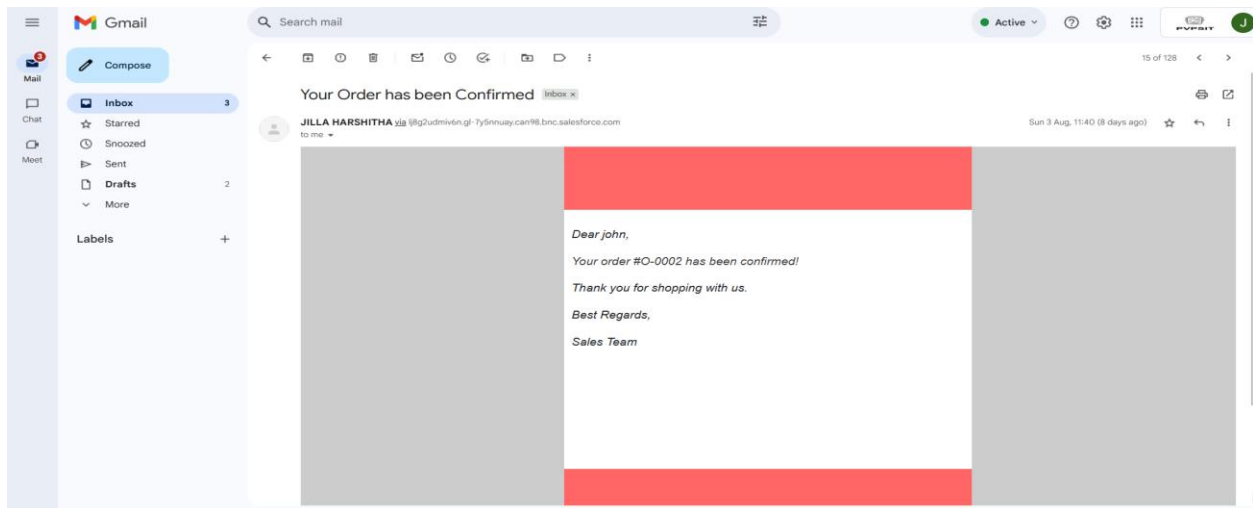


Fig: Order Confirmation Email

CONCLUSION

The HandsMen Threads CRM system built on Salesforce successfully streamlines key business processes like customer management, product cataloguing, 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 programs.