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

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PROJECT OVERVIEW:

This project highlights the creation of a fully tailored Salesforce CRM for **HandsMen Threads**, a luxury menswear and tailoring brand. The objective of the implementation was to streamline internal processes, strengthen customer engagement, and ensure reliable, consistent data across the organization.

The CRM was designed with a well-structured data model built around five core custom objects: **Customer**, **Order**, **Product**, **Inventory**, and **Marketing Campaign**. Essential business operations were automated using **Record-Triggered Flows**, **Scheduled Flows**, **Email Alerts**, and Apex logic, enabling the system to handle order confirmations, update loyalty tiers, and issue early warnings for low stock levels.

To safeguard data quality and protect confidential information, the configuration included strict **validation rules** and a **role-based security model** customized for the Sales, Inventory, and Marketing teams. Additionally, a scheduled **Apex batch** job was developed to continuously check and update items with low inventory.

Overall, the new CRM solution boosted operational efficiency through automation, improved customer satisfaction via personalized communication, and delivered a scalable foundation that supports the company's long-term growth on the Salesforce platform.

OBJECTIVES:

The main objective of this project is to create and implement a customized Salesforce CRM for **HandsMen Threads** that streamlines operations, preserves data integrity, and enhances the overall customer journey.

By building a unified system to manage customer information, orders, products, inventory, and marketing efforts, the project aims to:

- **Automate key operational processes** such as sending order confirmation emails, updating loyalty statuses, and issuing low-stock alerts.
- **Ensure accurate and consistent data** across all departments through validation rules and structured data entry.
- **Deliver real-time visibility** into customer activity and inventory levels to support quicker, more informed business decisions.

- **Improve collaboration** between Sales, Marketing, and Inventory teams with role-based permissions and secure data access.
- **Strengthen customer loyalty** through personalized messaging and targeted, reward-driven marketing initiatives.

TECHNOLOGY DESCRIPTION:

Salesforce

Salesforce is a cloud-based Customer Relationship Management (CRM) platform that enables organizations to manage customer data, streamline operations, and improve performance across sales, service, and marketing. It provides easy-to-use configuration tools along with advanced development capabilities—such as Apex, Flow, and automation—to build tailored business solutions.

Custom Objects

In Salesforce, objects function similarly to database tables. Custom Objects are created to store information unique to a company's operations.

Examples include:

- **Customer__c** – Holds customer profile details
- **Product__c** – Contains product-related information
- **Order__c** – Records and tracks customer orders

Tabs

Tabs offer users direct access to object records from the Salesforce interface.
Example:
A Product tab lets users quickly view, create, and manage product entries.

Custom App

A Salesforce App is a collection of tabs and components organized to support specific business processes or departmental needs. It provides users with a tailored workspace focused on their role's functions.

Profiles

Profiles control what users can do and access within Salesforce. They define permissions at the object and field level, as well as overall system capabilities for each user.

Roles

Roles determine a user's visibility into records based on the organization's hierarchy. They support data sharing, reporting, and controlled record access.

Permission Sets

Permission Sets allow administrators to grant users additional access without changing their main profile. They are useful for giving extra privileges when needed on a case-by-case basis.

Validation Rules

Validation Rules ensure that information entered into Salesforce complies with business standards before a record can be saved.

Examples:

- Ensuring an email address includes "@gmail.com"
- Preventing stock quantities from being saved as negative numbers

Email Templates

Email Templates are reusable formats used for sending consistent communications to customers or team members.

Example:
A predefined Order Confirmation template used after a customer completes a purchase.

Email Alerts

Email Alerts are automated notifications, typically triggered through Flows or Workflow Rules, that send emails using designated templates.

Example:
Automatically emailing customers when their loyalty level has been updated.

Flows

Flows are Salesforce's no-code automation tools that allow businesses to execute logic such as updating records, sending notifications, or guiding users through step-by-step screens.

Example:
A flow that automatically triggers an order confirmation email whenever a new order is created.

Apex

Apex is Salesforce's proprietary programming language used to handle advanced automation or complex logic that cannot be achieved with standard configuration tools.

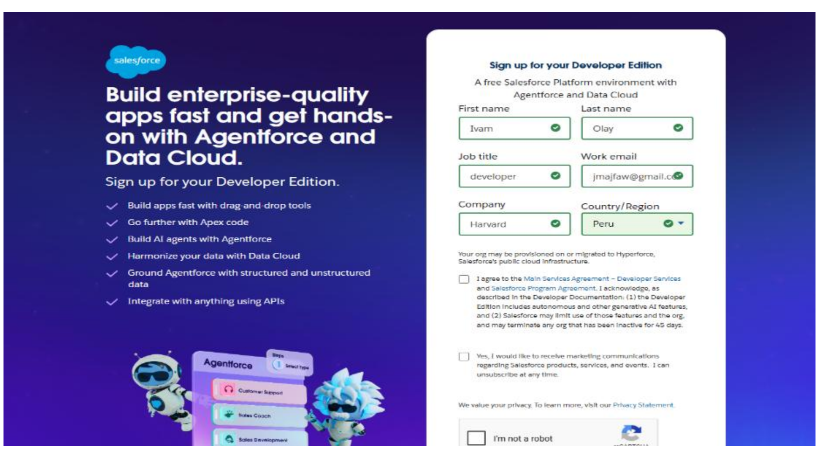
Example Trigger Scenarios:

- Recalculating the total order amount when new items are added
- Decreasing inventory levels once an order is finalized

DETAILED EXECUTION OF PROJECT PHASE

Creating Developer Account

1. **Developer Org Setup A Salesforce Developer Org was created using** https://developer.salesforce.com/signup.



2. Custom Object Creation

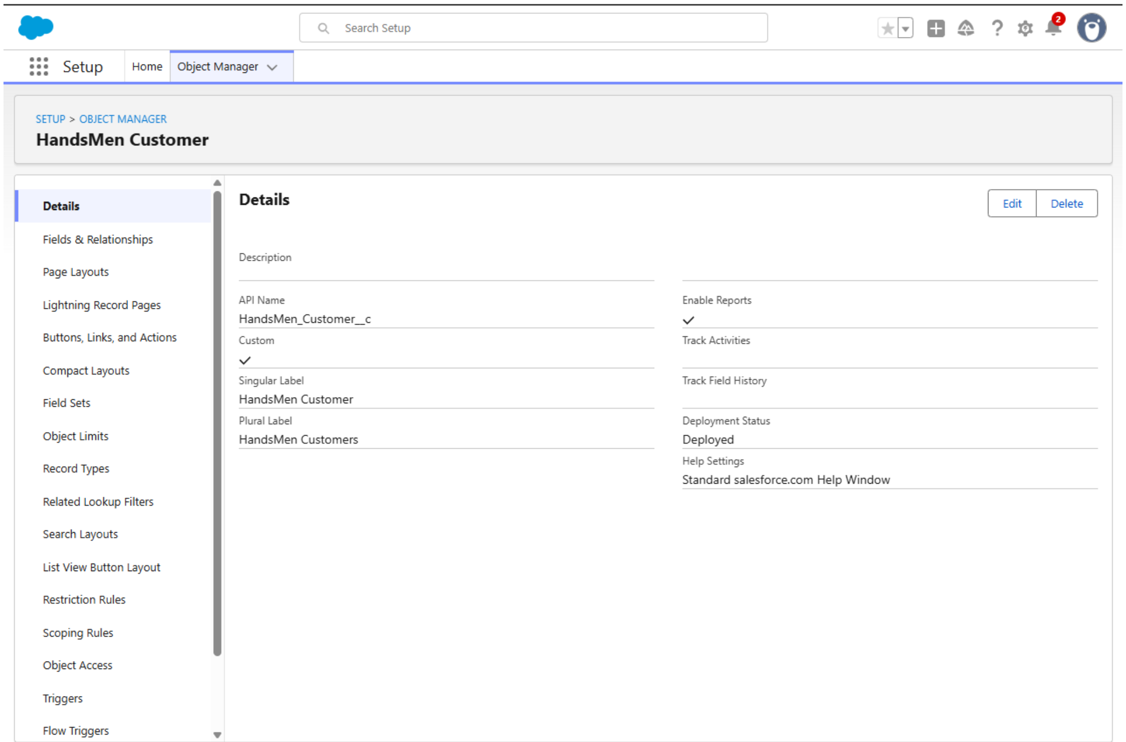
To store and manage the essential business information for HandsMen Threads, five custom Salesforce objects were developed:

- **HandsMen Customer** – Holds customer details such as name, email, phone number, and loyalty tier.
- **HandsMen Product** – Contains product catalog information, including SKU, pricing, and current stock levels.
- **HandsMen Order** – Captures order-related data like quantity, order date, and order status.
- **Inventory** – Tracks product stock levels and warehouse locations.
- **Marketing Campaign** – Maintains information for promotional activities, including timing, audience segments, and campaign details.

Steps Taken to Create Each Custom Object:

- Go to **Setup → Object Manager → Create → Custom Object**.
- Enter the object's **Label** and **API Name**, and enable features such as **Reporting** and **Searchability**.
- Save the object.
- Create a corresponding **Tab** so users can quickly view and manage records from the Salesforce interface.

This organized configuration ensures all core business data is centralized, easy to maintain, and fully prepared for automation, reporting, and future enhancements.



3. Creating the Lightning App

- A custom **Lightning App** called HandsMen Threads was developed to bring all essential business functions together in one place.
- The app was configured with key tabs such as HandsMen Customer, HandsMen Order, HandsMen Product, Inventory, Marketing Campaign, Reports, and any additional tabs required for operations.
- The System Administrator profile was granted access to the app, ensuring full visibility and complete management control.

4. Validation Rules

To protect data quality and ensure proper business logic, validation rules were added to key custom objects. These rules require users to enter accurate and meaningful information before a record can be saved.

Validation Rules Implemented

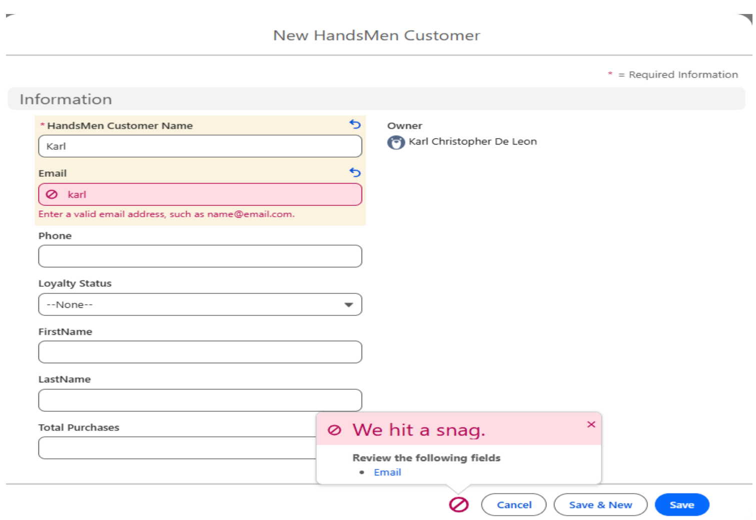
HandsMen Order Object

- **Rule:** Prevent saving an order if the Total Amount is less than or equal to zero.
- **Error Message:** *"Please enter a valid amount."*
- **Purpose:** Ensures that every order contains a legitimate, positive payment value.

HandsMen Customer Object

- **Rule:** The Email field must include "@gmail.com" to follow the required communication format.
- **Error Message:** *"Please enter a valid Gmail address."*
- **Purpose:** Ensures consistent and accurate email formatting for customer notifications.

These validation rules promote clean, trustworthy data and prevent incorrect inputs that could disrupt reporting, automation, or customer communication.



5. User Role & Profile Setup

To maintain proper access control and support a secure, organized system structure, user profiles and roles were configured based on departmental responsibilities.

Key Configuration Steps

1. Profile Setup

- The Standard User profile was cloned to create a custom profile named Platform 1.
- This profile was configured with access to all necessary custom objects, tabs, and permissions required for daily operations.

2. **Role** Hierarchy Creation
A set of roles was established to mirror the company's organizational structure and determine record visibility across teams:
   - Sales Manager – Has oversight of customer records and sales transactions.
   - Inventory Manager – Responsible for managing product quantities, stock levels, and warehouse-related data.
   - Marketing Team – Handles campaign planning, execution, and audience targeting.

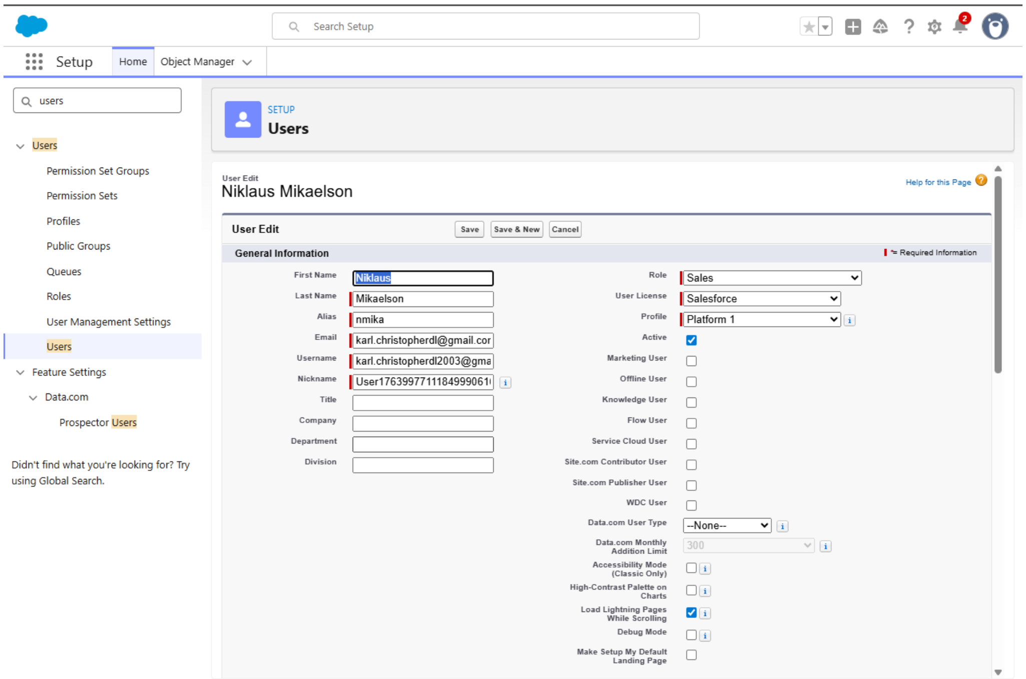
6. User Creation

Once roles and profiles were configured, users were added to Salesforce and granted permissions aligned with their job responsibilities.

User Assignments:

- **Niklaus Mikaelson** – Assigned the **Sales Manager** role, with access to customer records and order management tools.
- **Kol Mikaelson** – Assigned the **Inventory Manager** role, with permissions to manage product stock and inventory operations.

These assignments ensure that each user has the appropriate level of access, enabling secure data management and maintaining effective workflow control across departments.



7. Email Templates & Alerts

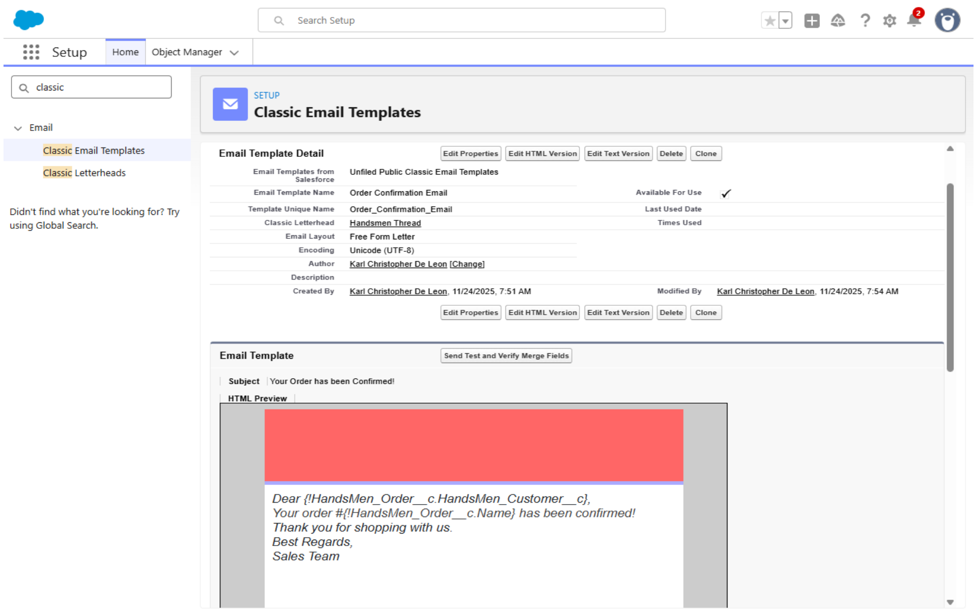
Email Templates Created for Automation:

- **Order Confirmation** – Sent automatically when an order is marked as *Confirmed*.
- **Low Stock Alert** – Triggered when inventory for a product drops below five units.
- **Loyalty Program Update** – Sent whenever a customer's loyalty status changes.

Email Alerts Configuration:

- Each template was linked to corresponding automation flows to ensure notifications are delivered promptly and accurately.

These setups enhance communication efficiency and ensure stakeholders receive timely updates.

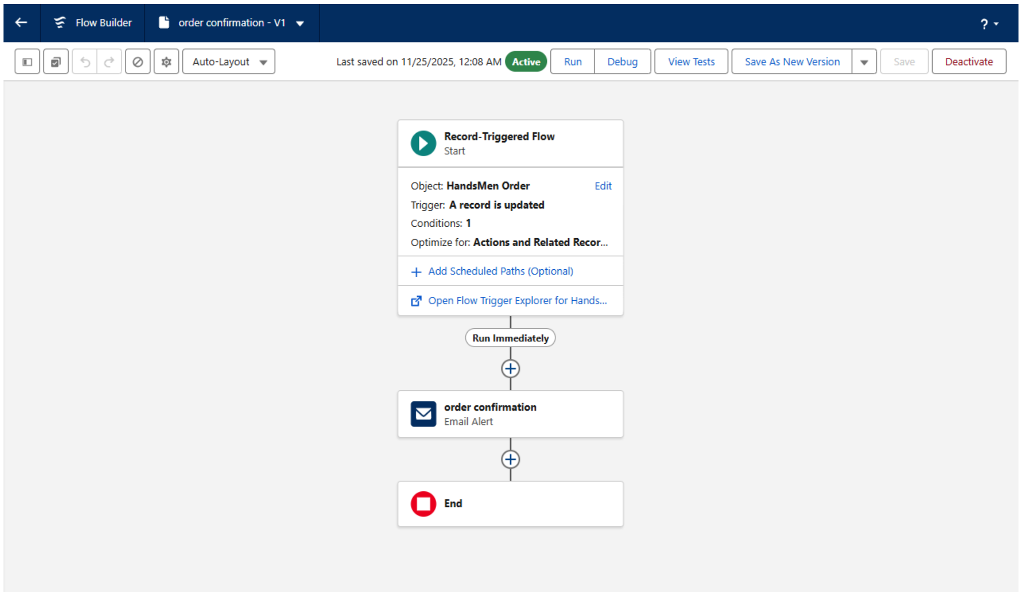


8. Flow Implementations

A. Order Confirmation Flow

- Automatically triggered whenever an order's status is updated to **Confirmed**.
- Sends a personalized **Order Confirmation** email to the customer, keeping them promptly informed about their order.

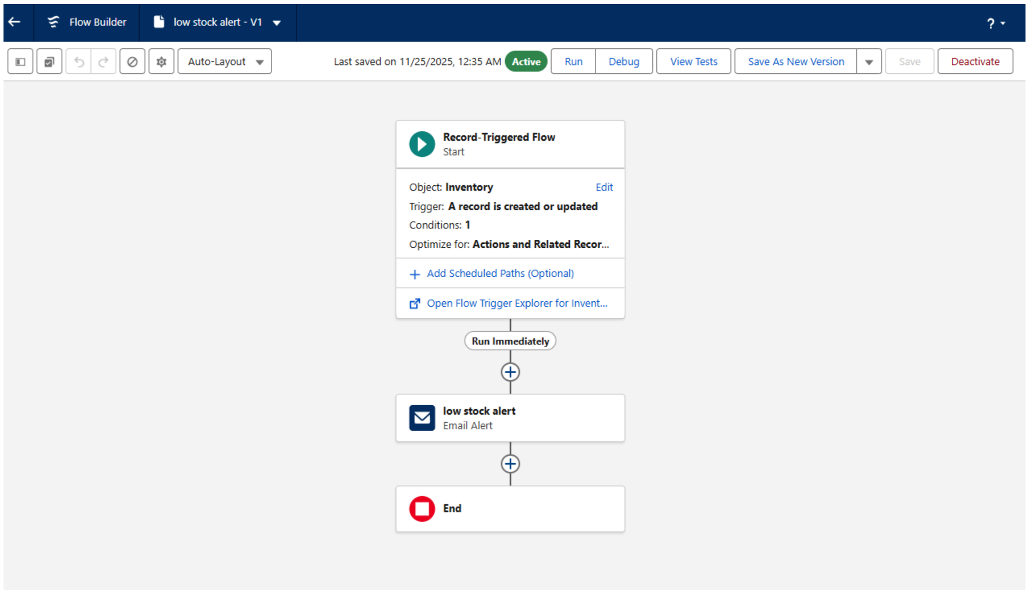
This flow enhances customer experience by providing timely and accurate order updates.



B. Stock Alert Flow

This flow was designed to enable the Inventory team to respond quickly to low-stock situations and maintain product availability.

- It is a record-triggered flow that activates when a product's inventory falls below five units.
- When triggered, the flow identifies the product and checks its current stock level.
- A Low Stock Alert email is automatically sent to the Inventory Manager using the predefined email template.
- This ensures the team is immediately aware of low inventory, supporting timely restocking and preventing potential delays or product shortages.

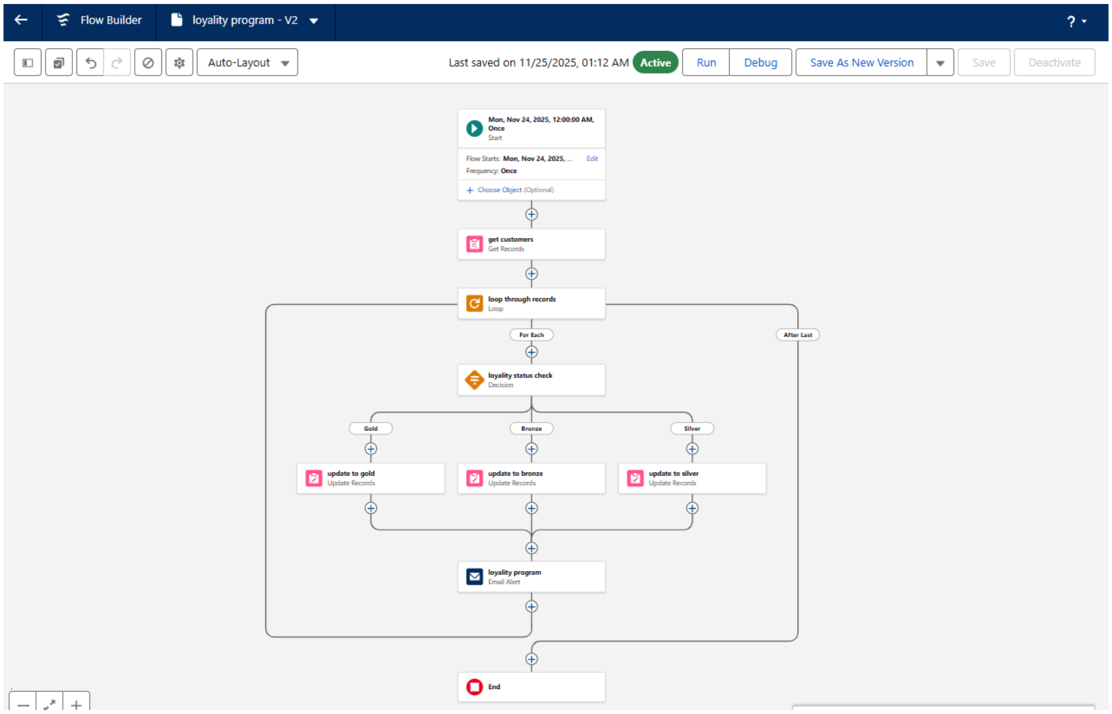


C. Scheduled Loyalty Update Flow

This scheduled flow automates the maintenance of the company's loyalty program, keeping it accurate without manual intervention.

- Configured to run daily at midnight, the flow reviews all customer records in the system.
- For each customer, it evaluates their total cumulative purchases to determine eligibility for a higher or updated loyalty tier.
- The Loyalty Status field is updated accordingly, ensuring that every customer's membership level reflects their latest activity.

This automation maintains a consistent loyalty program, supports personalized marketing, and ensures customers receive benefits that accurately reflect their purchase history.



9. Apex Triggers

- **Order Total Trigger**
  - Automatically calculates the **Total Amount** of an order by multiplying product quantity with unit price.
- **Stock Deduction Trigger**
  - Automatically reduces inventory levels when an order is placed, ensuring stock records remain accurate.
- **Loyalty Status Trigger**
  - Updates a customer's **Loyalty Status** based on their cumulative purchases, supporting automated rewards and benefits.

Project Explanation with Real-World Example

The Salesforce CRM implementation can be understood through a typical customer interaction with HandsMen Threads:

1**. Customer Registration**

- A customer, **Robert Mikaelson**, visits the store or online website.
- A new **Customer** record is created in Salesforce, capturing essential information such as name, phone number, email address, and other relevant details.
- **Validation Rules** ensure that all data entered meets business standards—for instance, the email must include **"@gmail.com"** to pass system validation.

2. **Product Setup**

- The system administrator adds products, such as **Shirts** and **Jeans**, to the **Product__c** custom object.
- Each product record contains key information including **price**, **SKU**, **description**, and category.
- Corresponding **Inventory** records are created to track stock levels, warehouse locations, and replenishment thresholds, ensuring accurate and up-to-date inventory management.

3. **Order Placement**

- Robert decides to purchase **2 Shirts** priced at ₹2,500 each.
- A new **Order** record is created in Salesforce to capture the transaction details.
- An **Apex Trigger** automatically calculates the **Total Amount** for the order:
    - **Example Calculation:** 2 × ₹2,500 = ₹5,000

- This automation eliminates manual errors and ensures the order total is always accurate.

4. **Inventory Update**

- Once the order is confirmed:
    - The **Inventory Trigger** automatically decreases the stock of **Shirts** by 2 units.
    - A **Validation Rule** ensures that inventory cannot drop below zero, preventing negative stock values.
- This process maintains accurate, real-time inventory data and helps prevent overselling.

5. **Loyalty Program**

- With a total purchase of ₹5,000, **Robert** becomes eligible for an updated loyalty status.
- A **Customer Apex Trigger** evaluates cumulative purchases against predefined thresholds:
    - **< ₹500 → Bronze**
    - **₹500–₹1,000 → Silver**
    - **> ₹1,000 → Gold**
- This automation ensures customers are assigned the correct loyalty tier based on their purchase history, supporting rewards and personalized benefits.
- Based on this assessment, **Robert is upgraded to a Silver member**, and his **loyalty status** is automatically updated in Salesforce.

6. **Email Notifications**

- Whenever an order is placed or a customer's loyalty status changes:
    - A **Flow** triggers an **Email Alert** using predefined templates.
    - **Elijah** receives a personalized message, for example:

  - *"Thank you for your purchase! Your loyalty status is now Silver."*

- This automation ensures timely, consistent communication, enhancing customer engagement and overall satisfaction.

7. Users and Roles

- To manage Salesforce operations, users were created for staff members and assigned roles and profiles based on their responsibilities.

Role and Profile Assignments:

- **Niklaus Mikaelson** – Assigned the **Sales Manager** role with the **Platform 1** profile, granting access to customer records and order management tools.
- **Kol Mikaelson** – Assigned the **Inventory Manager** role with the **Platform 1** profile, providing permissions to manage products, stock levels, and inventory records.
- This role-based configuration ensures secure data access, maintains workflow control, and supports efficient collaboration and task management across departments.

SCREENSHOTS

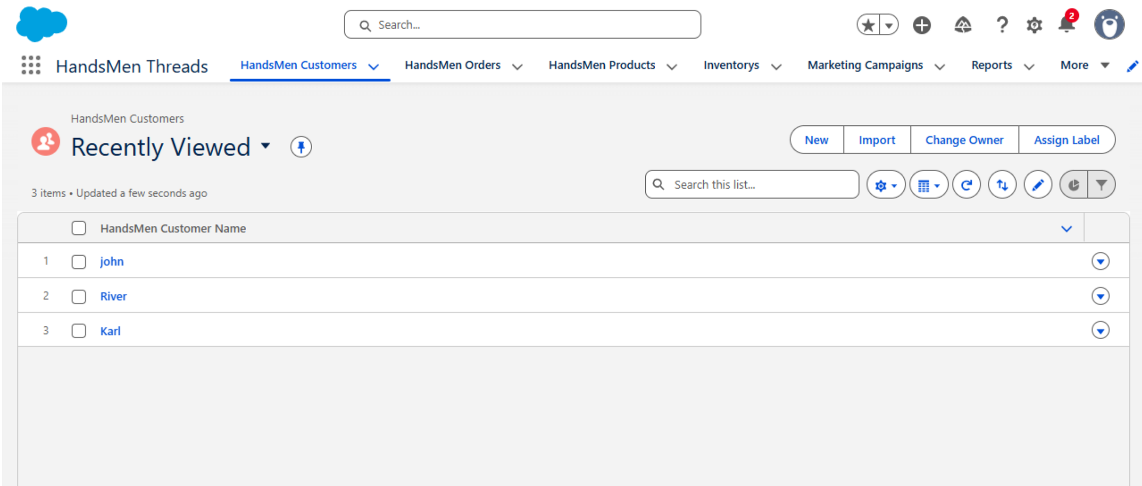


FIG: CUSTOM APP FOR HandsMen Threads

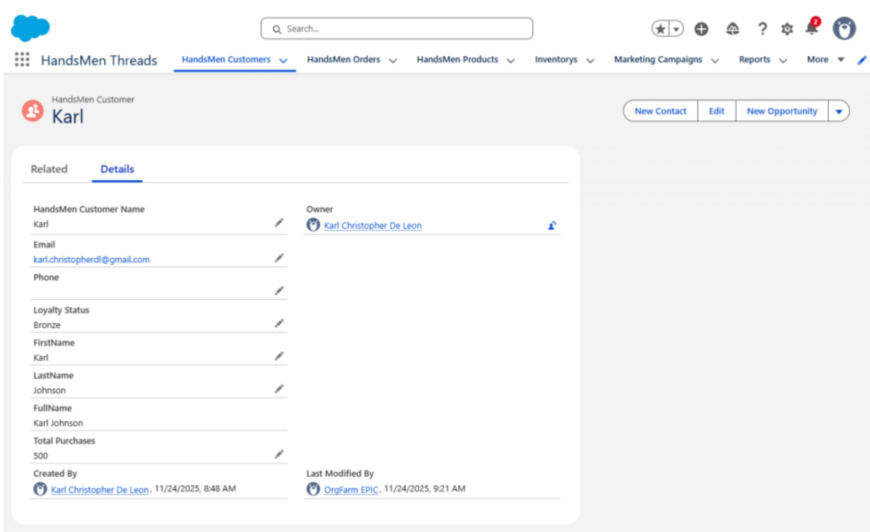


FIG: CUSTOMER CREATION IN HandsMen Threads

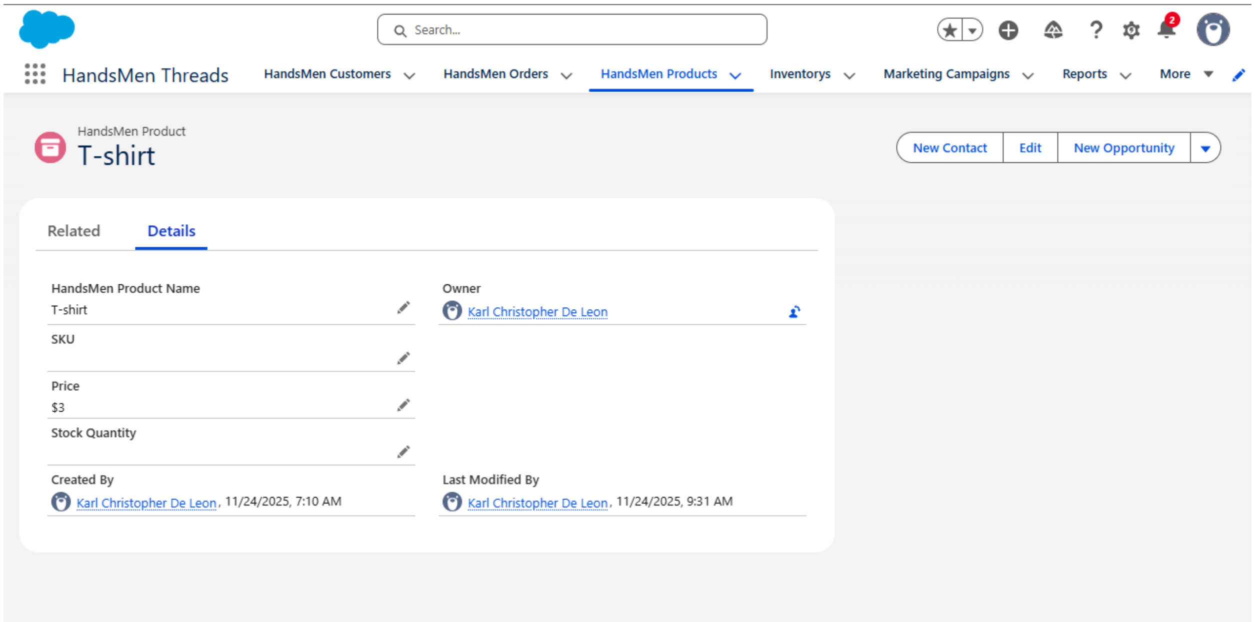


FIG: PRODUCTS IN HandsMen Threads

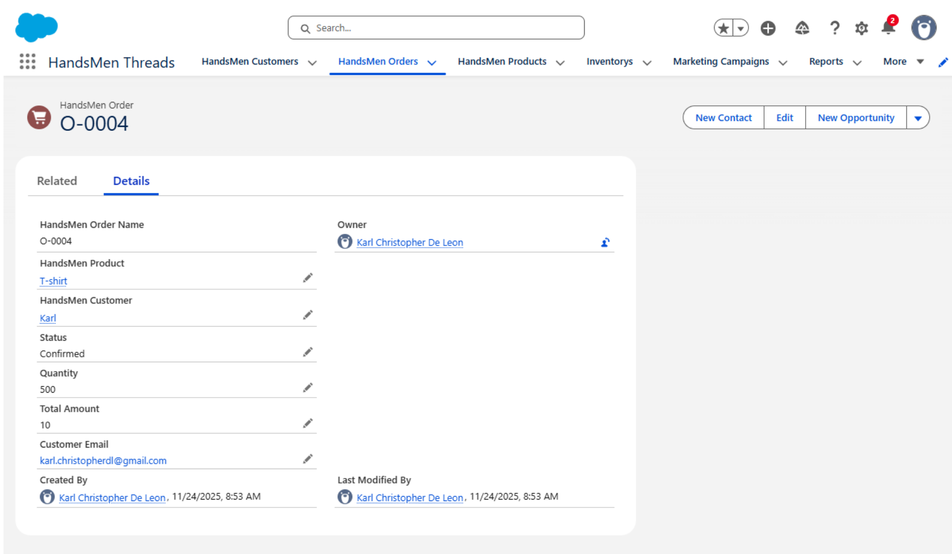


FIG: ORDER CONFIRMATION

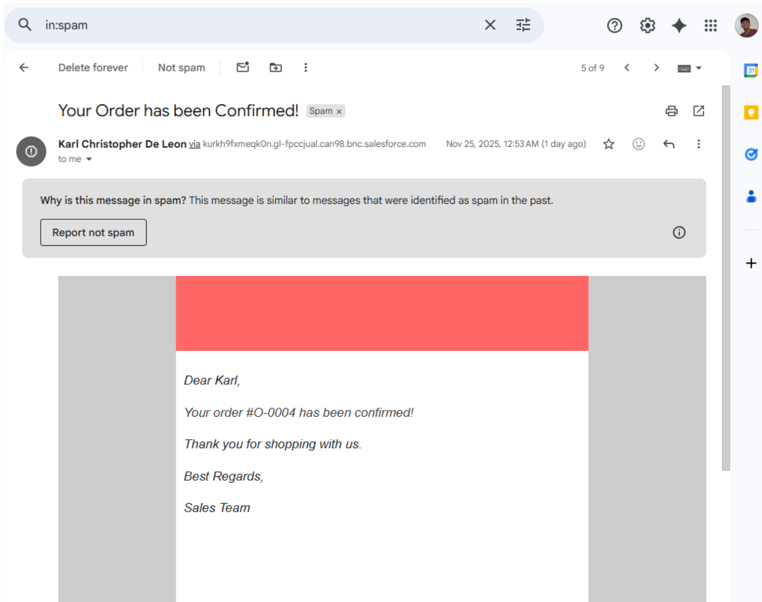


FIG: ORDER CONFORMATION EMAIL

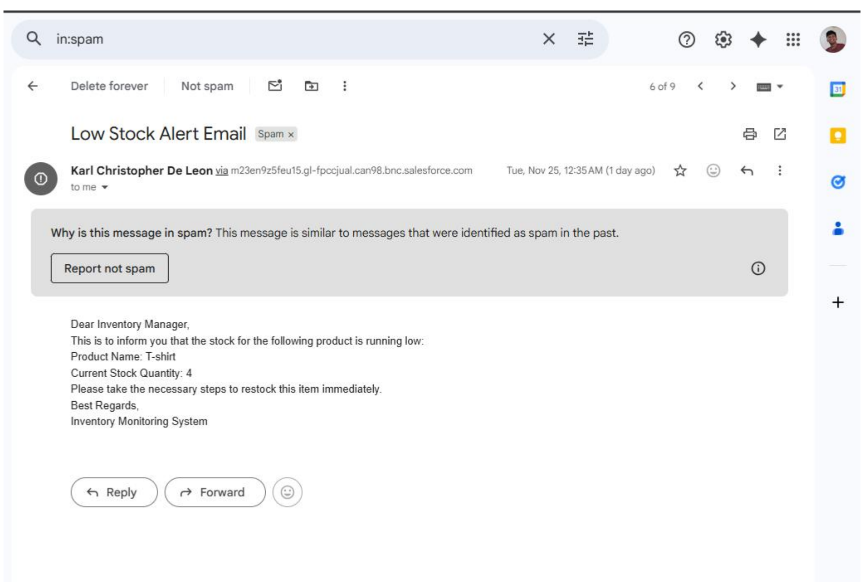


FIG: LOW STOCK ALERT EMAIL

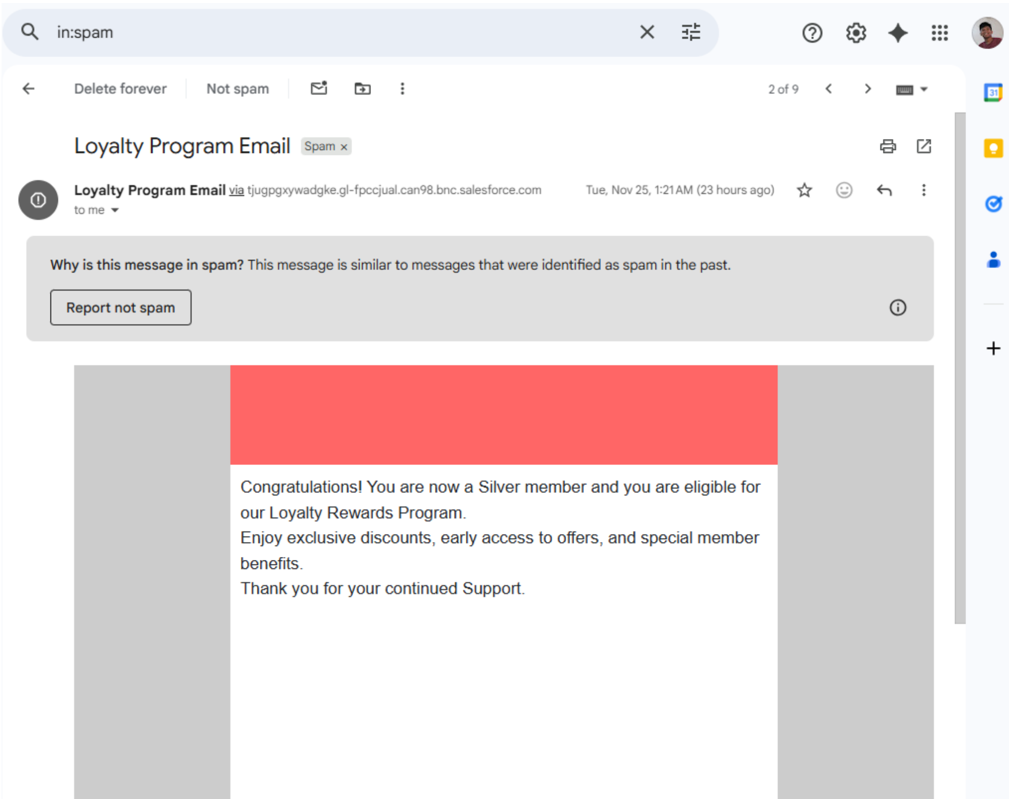


FIG: LOYALTY PROGRAM EMAIL

Conclusion

The customized Salesforce CRM implementation for **HandsMen Threads** has streamlined business operations, improved data accuracy, and enhanced customer engagement by centralizing core objects such as **Customers, Products, Orders, Inventory,** and **Marketing Campaigns**. Automation through **Flows, Apex Triggers,** and **Email Alerts** has minimized manual tasks, ensured timely notifications, and maintained accurate inventory and loyalty records, while role-based access and profiles secure sensitive data and support effective collaboration across Sales, Inventory, and Marketing teams. Overall, this CRM provides a scalable and robust foundation that enables business growth and delivers a more efficient, personalized customer experience.

Future Scopes

The Salesforce CRM for **HandsMen Threads** can be further optimized with several enhancements:

1. **Mobile Integration** – Allow sales staff and managers to access the CRM via mobile devices, enabling on-the-go order updates, inventory monitoring, and customer communication.
2. **Advanced Analytics & Reporting** – Implement dashboards and AI-driven insights to track sales trends, forecast inventory, and analyze customer behavior.
3. **E-commerce Platform Integration** – Connect the CRM with online stores for real-time order processing and automatic inventory updates.
4. **Enhanced Loyalty Programs** – Introduce tiered rewards, automated promotions, and personalized offers based on customer preferences and purchase history.
5. **Chatbots & Customer Self-Service** – Provide automated support for customer inquiries, order tracking, and product recommendations.
6. **Marketing Automation** – Expand campaign management through targeted email campaigns, social media integration, and performance tracking.

These enhancements will further streamline operations, improve customer satisfaction, and create a scalable platform that supports long-term business growth for HandsMen Threads.