

HandsMenThreads: Elevating Men's Fashion with Salesforce

ABSTRACT

A tailored Salesforce CRM was crafted for HandsMen Threads, a top-tier brand in men's fashion. The central aim was to streamline customer handling, order fulfillment, inventory control, and marketing initiatives to fuel business expansion. By harnessing the capabilities of the Salesforce cloud platform, we automated critical operational workflows, safeguarded data accuracy, and delivered instant visibility into business activities. The custom solution features dedicated objects, advanced automated flows, rigorous validation protocols, scheduled email alerts, and bespoke Apex programming — all structured to elevate customer interaction, increase sales performance, prevent inventory shortages, and maintain a comprehensive view of the enterprise.

OBJECTIVE

This project set out to develop and roll out a customized Salesforce CRM for HandsMen Threads, with the intent of streamlining core operations and increasing customer satisfaction.

The specific objectives are:

- Maintain precise and uniform data entry by implementing robust validation protocols.
- Facilitate seamless collaboration and information flow among sales, inventory, and marketing teams.
- Enable real-time visibility into inventory quantities, customer activity, and sales outcomes for all teams.
- Create truly individualized customer experiences via automated communications and loyalty engagement initiatives.

TECHNOLOGY DESCRIPTION

Salesforce Platform

The Salesforce Platform operates as the central hub of our operations — a cloud-based Customer Relationship Management (CRM) solution enabling complete oversight of customer-related activities. It comes equipped with a comprehensive suite of tools to automate processes, elevate customer service quality, fine-tune marketing campaigns, and drive sales growth. For this project, we harnessed both its straightforward drag-and-drop interface for quick configurations and its advanced development features, including Apex and Flows, to meet more complex business requirements.

Custom Objects

These are like our custom-built digital filing cabinets within Salesforce, specifically designed to store HandsMen Threads' unique information:

- **Customer_c:** This is where we keep all the juicy details about each customer – personal info, contact details, and their current loyalty status.
- **Product_c:** Here, we manage every single product, from its name and description to its price and how many we have in stock.
- **Order_c:** This object meticulously records every customer order, linking it back to the specific customer and products involved, along with the order date, total amount, and quantity.
- **Marketing_Campaign_c:** We use this to track all our marketing initiatives and promotions, helping us see what's working best.

Tabs

Tabs act as convenient navigation points, giving quick access to important sections. For every custom object — such as “Products” or “Orders” — we designed dedicated tabs that enable the team to easily view, create, and manage records within the “HandsMen Threads” application. This setup ensures smooth and organized access to all essential information.

Custom App

We developed a tailored Lightning Application titled “HandsMen Threads,” which functions as the operational nucleus for the team. This app consolidates all critical tabs — including Customer, Order, Product, Inventory, Campaign, and Reports — into one unified workspace, streamlining processes and maximizing productivity.

Profiles & Roles

These components are essential for managing user permissions and regulating access to system data.

- **Profiles:** Define what a user can view, edit, and access, including specific objects, fields, and overall page layouts. We created tailored profiles such as the “HandsMen Sales Profile” to match particular job responsibilities.
- **Roles:** Control data visibility according to our organizational structure. For example, a “Sales Manager” has visibility overall sales data, whereas a “Sales Representative” can only view their own records, with the reporting relationships remaining transparent.

Permission Sets

These are like bonus permission packs. We use them to give users extra access to specific tools or functions beyond what their standard profile allows, giving us even finer control without messing with their main profile settings.

Validation Rules

These are our data quality guardians! Validation rules check the information users enter to make sure it meets our standards before it's saved. For instance:

- Email addresses are validated to conform to a standard format (e.g., must contain “@gmail.com”).
- Orders are prevented from being saved if they would result in a negative product stock balance.

Email Templates & Alerts

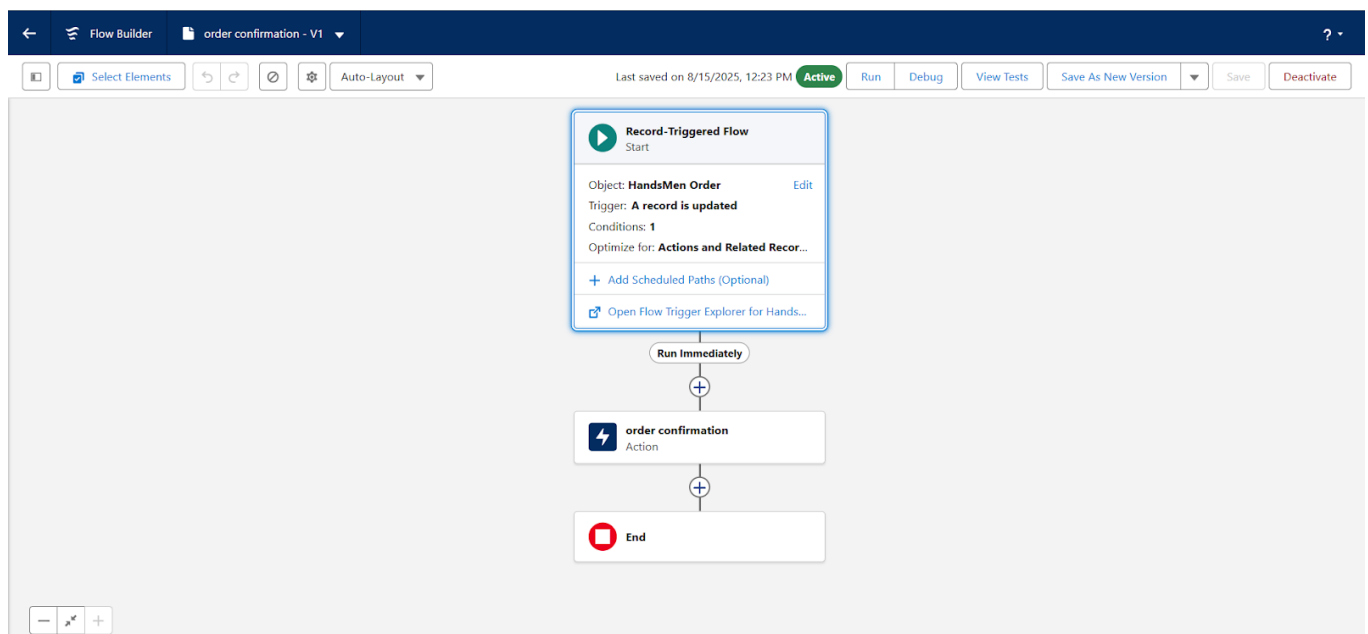
These facilitate consistent and automated communication:

- **Email Templates:** These are pre-designed email layouts (e.g., our "Order Confirmation" template) that ensure the professional and consistent appearance of our messages.
- **Email Alerts:** These are automatic email notifications triggered by specific conditions, such as the receipt of a new order or a change in a customer's loyalty status.

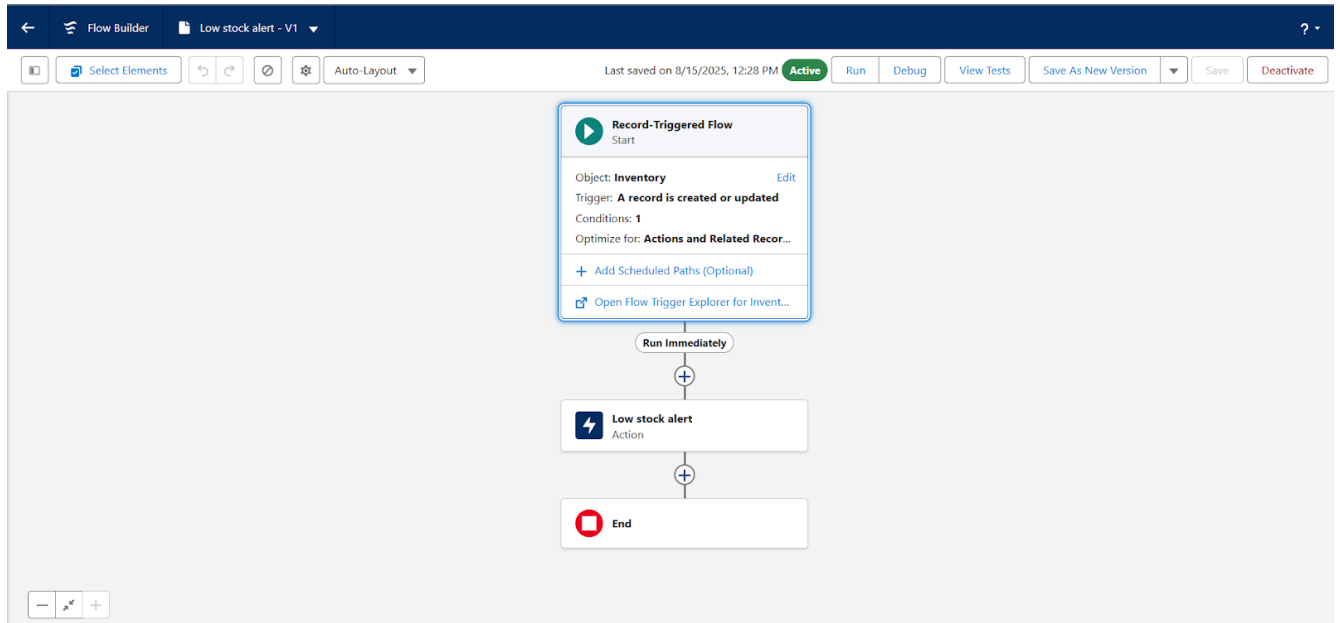
Flows

Flows serve as our visual automation tools, enabling us to construct intricate business logic without the need to write any code. Among the essential flows we have developed are:

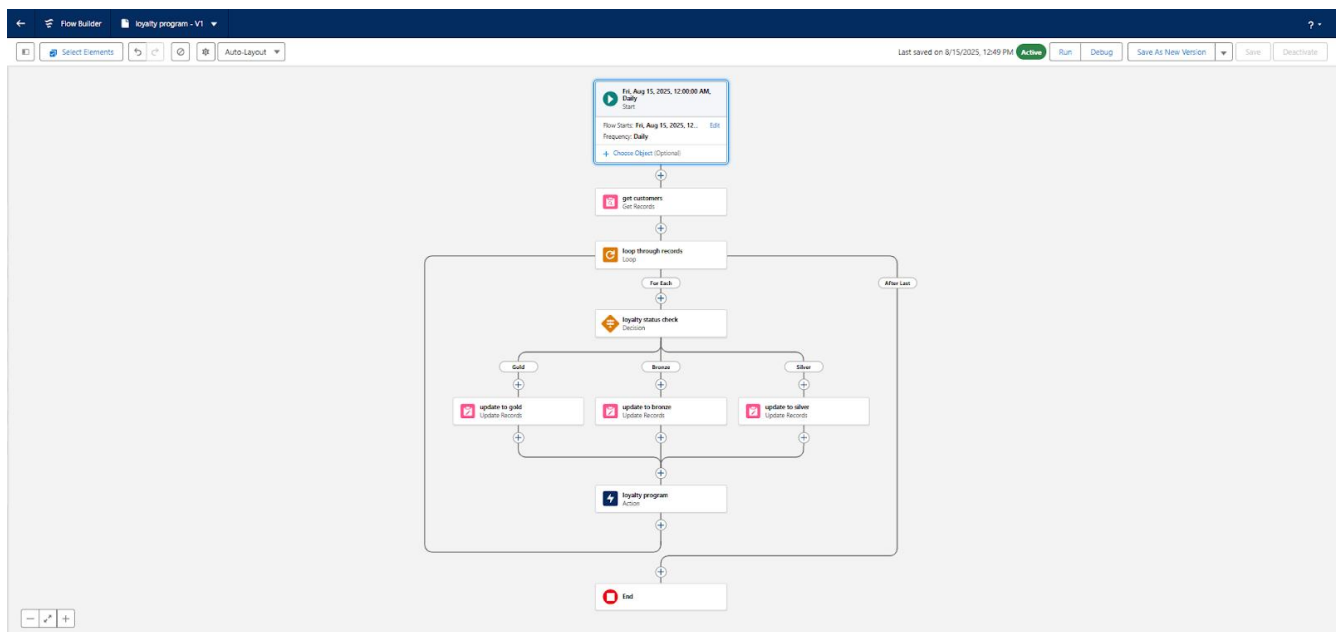
1. **Email Notification Flow:** This particular flow is designed to automatically dispatch an order confirmation email to the customer immediately upon the placement of a new order.



2. **Stock Update Flow:** When an order is created or changed, this flow automatically updates the product's available stock.



3. **Scheduled Loyalty Update Flow:** This flow runs every day (say, at midnight) to check and update customer loyalty statuses based on their total purchase amounts.



Apex

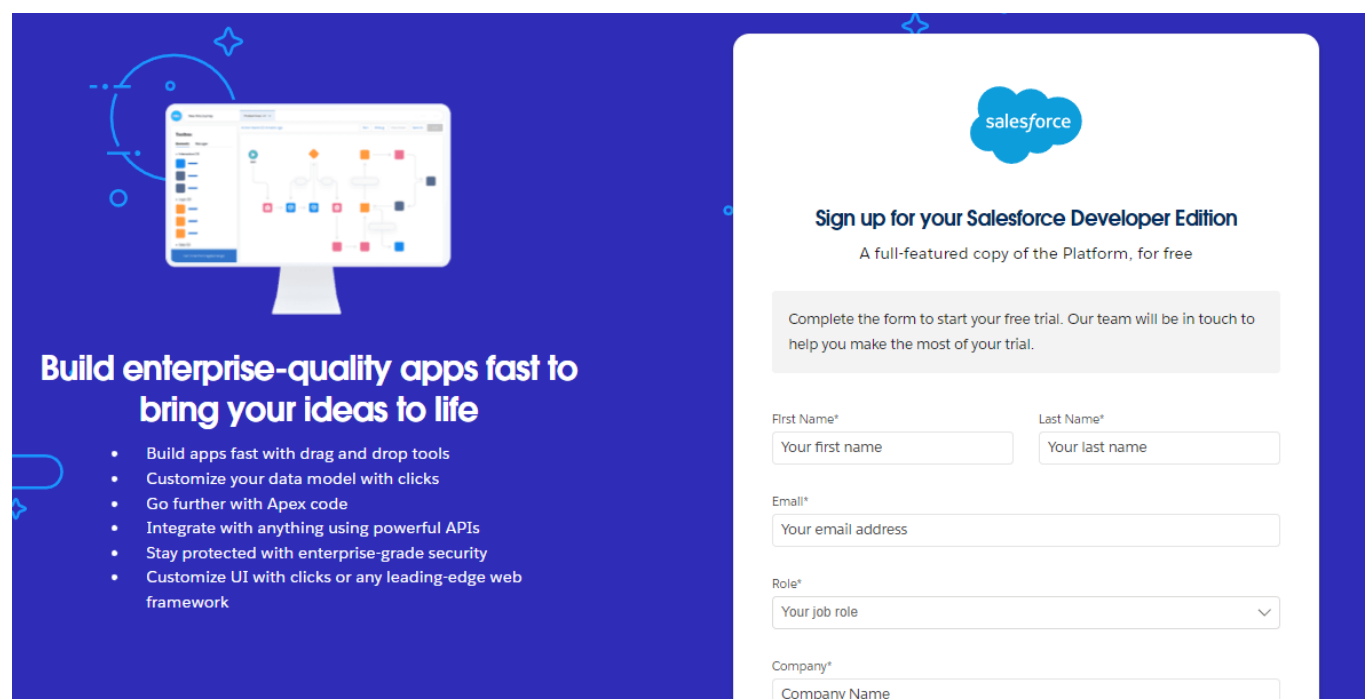
Apex, Salesforce's proprietary programming language, is utilized to develop specific or intricate business logic that cannot be accommodated by standard functionalities. Our Apex triggers include:

- **Order Total Trigger:** This trigger automates the calculation and update of the Total_Amount field on an order, based on the quantity and unit price.
- **Stock Deduction Trigger:** This trigger operates in the background to ensure accurate stock reduction from a product upon order confirmation. It functions in conjunction with our validation rules to prevent overselling.
- **Loyalty Status Trigger:** This trigger dynamically updates a customer's Loyalty_Status field in real-time, based on their cumulative purchase history.

DETAILED PROJECT EXECUTION

1. Salesforce Developer Org Setup

We set up a new Salesforce Developer Org at <https://developer.salesforce.com/signup>, our main environment for all development work.



The image shows the Salesforce Developer Edition sign-up page. On the left, there is a blue background with a white monitor displaying a flowchart. Below the monitor, the text reads: "Build enterprise-quality apps fast to bring your ideas to life". To the right of this text is a list of bullet points: "Build apps fast with drag and drop tools", "Customize your data model with clicks", "Go further with Apex code", "Integrate with anything using powerful APIs", "Stay protected with enterprise-grade security", and "Customize UI with clicks or any leading-edge web framework". On the right side of the image, there is a white sign-up form with the Salesforce logo at the top. The form title is "Sign up for your Salesforce Developer Edition" with the subtitle "A full-featured copy of the Platform, for free". Below this, there is a grey box with the text: "Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial." The form fields include: "First Name*" (with placeholder "Your first name"), "Last Name*" (with placeholder "Your last name"), "Email*" (with placeholder "Your email address"), "Role*" (a dropdown menu with "Your job role" and a downward arrow), and "Company*" (with placeholder "Company Name").

Build enterprise-quality apps fast to bring your ideas to life

- Build apps fast with drag and drop tools
- Customize your data model with clicks
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Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.

First Name*
Your first name

Last Name*
Your last name

Email*
Your email address

Role*
Your job role

Company*
Company Name

2. Custom Object Creation

The foundational data structure was constructed through the creation of custom objects and their corresponding fields, designed to store all essential business information:

- **HandsMen Customer (Customer c):** Contains details pertinent to customers (Name, Email, Phone, Address, Loyalty_Status c).
- **HandsMen Product (Product c):** Encompasses product information (Name, Description, Unit_Price c, Stock c).
- **HandsMen Order (Order c):** Records customer orders (Date, Quantity c, Total_Amount c, with links to Customer and Product data).
- **Marketing Campaign (Marketing_Campaign c):** Manages information related to promotional activities.

3. Custom Lightning App

The "HandsMen Threads" Lightning App has been developed to consolidate all pertinent tabs, including Customer, Order, Product, Inventory, Campaign, and Reports, into a unified and user-friendly workspace for our teams.

4. Validation Rules

We implemented rules to ensure data quality

- **Product Stock:** Prevents Stock_c from being less than zero.
- **Customer Email:** Requires the Email field to contain "@gmail.com".

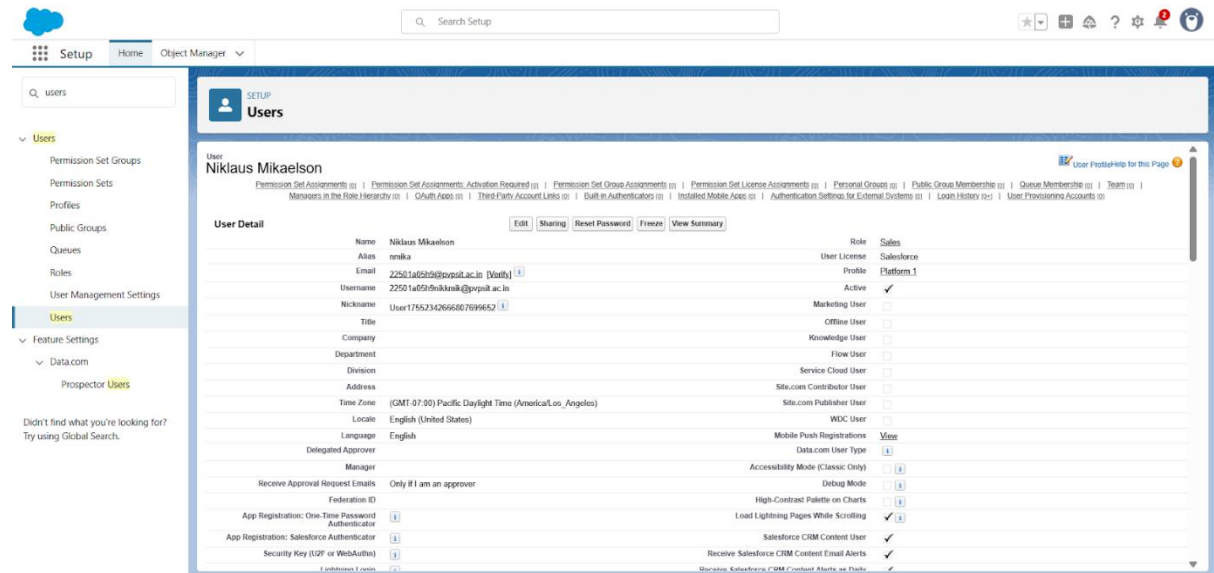
5. User Profiles & Roles

We configured specific profiles and roles to manage user access and data visibility:

- **Profiles:** Cloned "Standard User" to create profiles like "HandsMen Sales Profile."
- **Roles:** Defined a hierarchy including "Sales Manager," "Inventory Manager," etc., controlling data visibility based on responsibilities.

6. User Creation

We created new users and assigned them to their respective roles and profiles (e.g., Niklaus Mikaelson for Sales, Kol Mikaelson for Inventory) to demonstrate the system's multi-user capabilities.



7. Email Templates

Custom email templates were designed for automated and consistent communication, such as "Order Confirmation" and "Loyalty Status Update."

8. Flow Implementations

- Email Notification Flow (Record-Triggered):** Sends an order confirmation email to the customer when a new order is created.
- Stock Update Flow (Record-Triggered):** Automatically updates product stock when an order is created or changed.
- Scheduled Loyalty Update Flow (Scheduled-Triggered):** Runs daily to update customer loyalty status based on their total purchase amounts.

9. Apex Triggers

- a. **Order Total Trigger (OrderTrigger):** Automatically calculates and updates the total amount of an order based on quantity and unit price.
- b. **Stock Deduction Trigger (ProductStockUpdateTrigger):** Ensures product stock is correctly reduced after an order.
- c. **Loyalty Status Trigger (CustomerLoyaltyUpdateTrigger):** Updates a customer's loyalty status in real-time based on their cumulative purchase history.

PROJECT DEMONSTRATION: A Real-World Example

To show you how all this magic comes together, let's walk through a typical customer experience with HandsMen Threads:

1. Customer Registration:

Imagine a new customer, "John Doe" walks into our store. A sales rep quickly goes to the "HandsMen Customer" tab in our app and clicks "New." They enter John's details: Name, Phone, and Email (let's say "john.doe@gmail.com").

Validation Rule in Action: If the rep accidentally types "john.doe@yahoo.com," the system immediately pops up an error: "Please enter a valid Gmail address." This keeps our data clean!

Once everything's correct, John Doe is officially in our system.

2. Product Setup:

Meanwhile, our inventory manager ensures all products are correctly listed under the "HandsMen Product" tab. For example, a "Men's Suit - Classic Blue" is listed with a price of \$500 and 10 in stock.

3. Order Placement:

John Doe decides he loves the "Men's Suit - Classic Blue" and wants one. The sales rep creates a new order under the "HandsMen Order" tab. They link John Doe to the order, select the "Men's Suit - Classic Blue," and enter a quantity of 1.

Apex Trigger in Action: The moment the order is saved, our OrderTotalTrigger automatically calculates and fills in the Total_Amount_c as \$500 (1 suit * \$500). No manual math needed!

Email Notification Flow in Action: Almost instantly, the Email Notification Flow kicks in and sends John Doe an "Order Confirmation" email to his Gmail address, detailing his purchase.

4. Inventory Update:

Stock Update Flow in Action: Right after the order is saved, the "Men's Suit - Classic Blue" stock automatically updates from 10 to 9.

Validation Rule in Action: What if the rep tried to order 11 suits when only 10 were left? Our validation rule on the Product_c would block the order, preventing us from selling something we don't have!

5. Loyalty Status Update:

Apex Trigger in Action: As soon as John Doe's order is processed and his Total_Amount_c updates, our CustomerLoyaltyUpdateTrigger recalculates his total purchases. If this purchase pushes him over a loyalty threshold (e.g., becoming a "Silver Member"), his Loyalty_Status_c on his customer record instantly updates.

Scheduled Flow in Action: Just to be extra sure, our "Scheduled Loyalty Update" flow also runs daily. So, even if there were any missed updates, it would catch them and ensure all customer loyalty statuses are spot-on.

This whole process showcases how our Salesforce CRM solution for HandsMen Threads seamlessly manages everything, from greeting a new customer to processing their order and nurturing their loyalty!

SCREENSHOTS

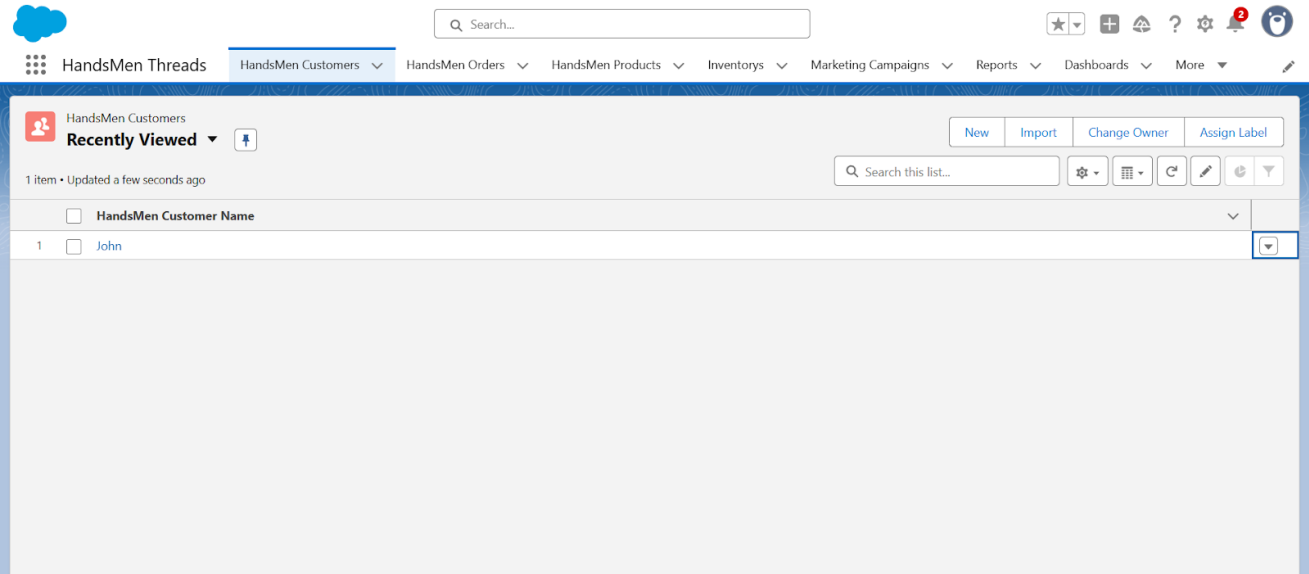


Fig: Custom App for HandsMen Threads

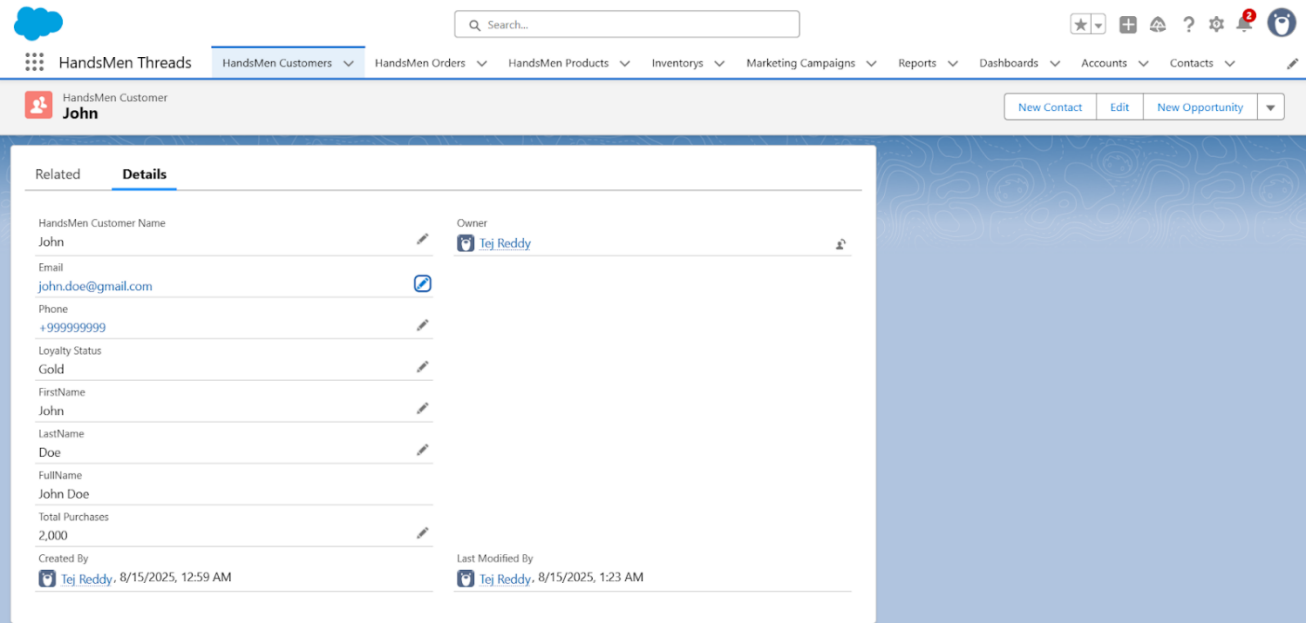


Fig: Customer Creation in HandsMen Threads

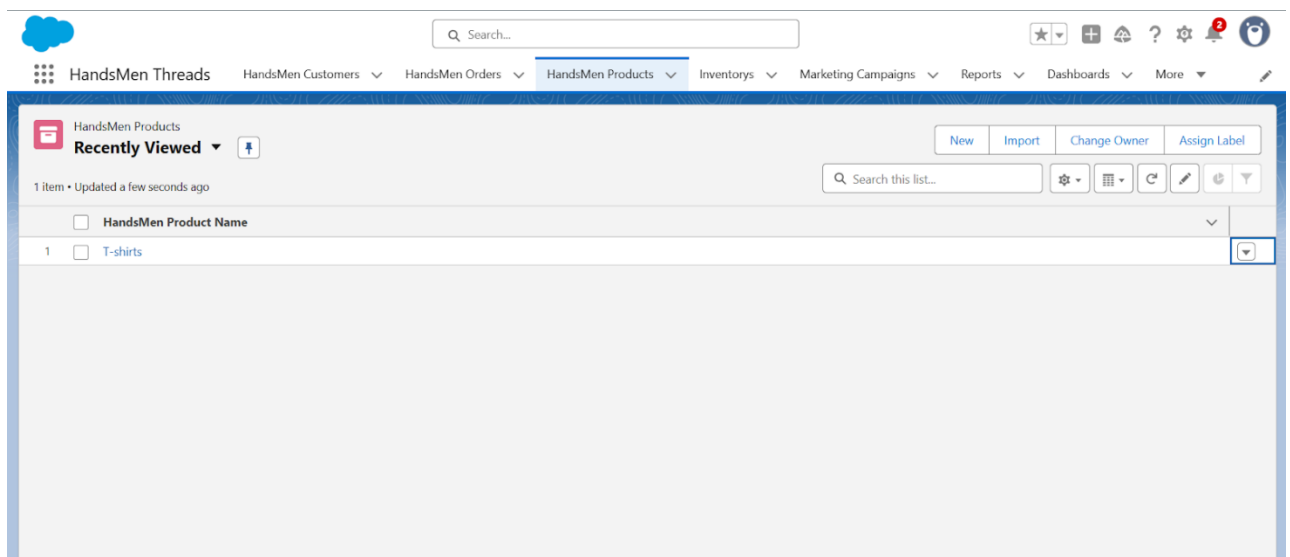


Fig: Product List View

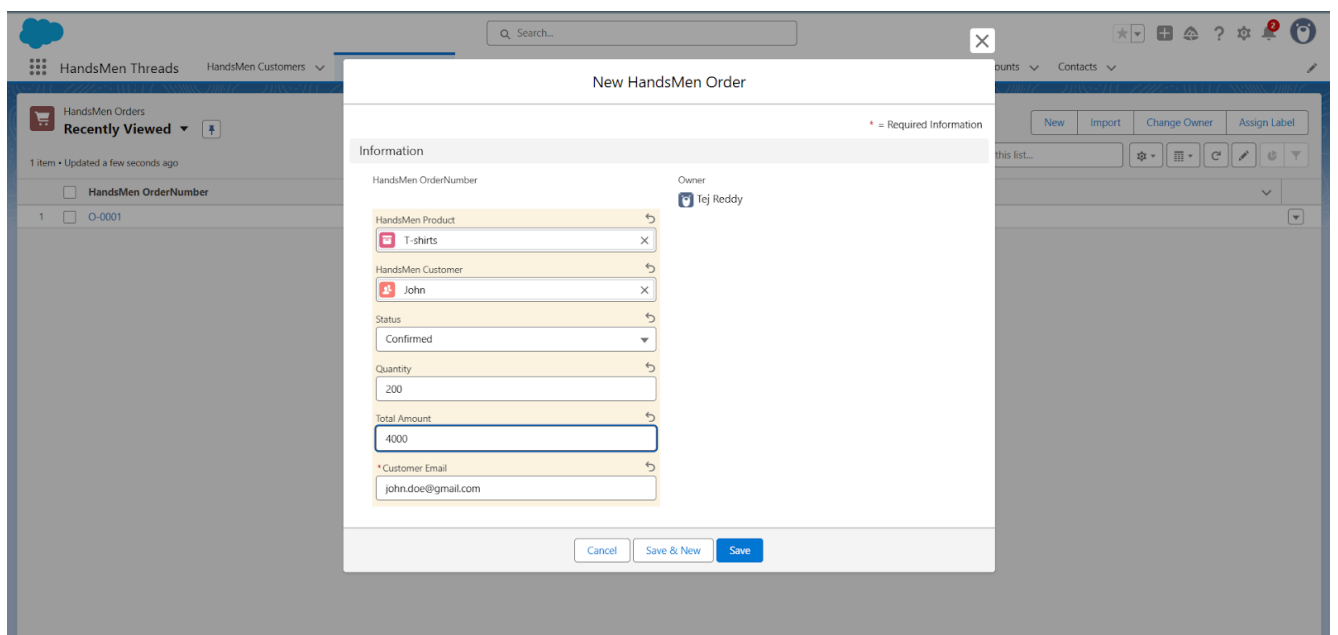


Fig: New Order Creation Page

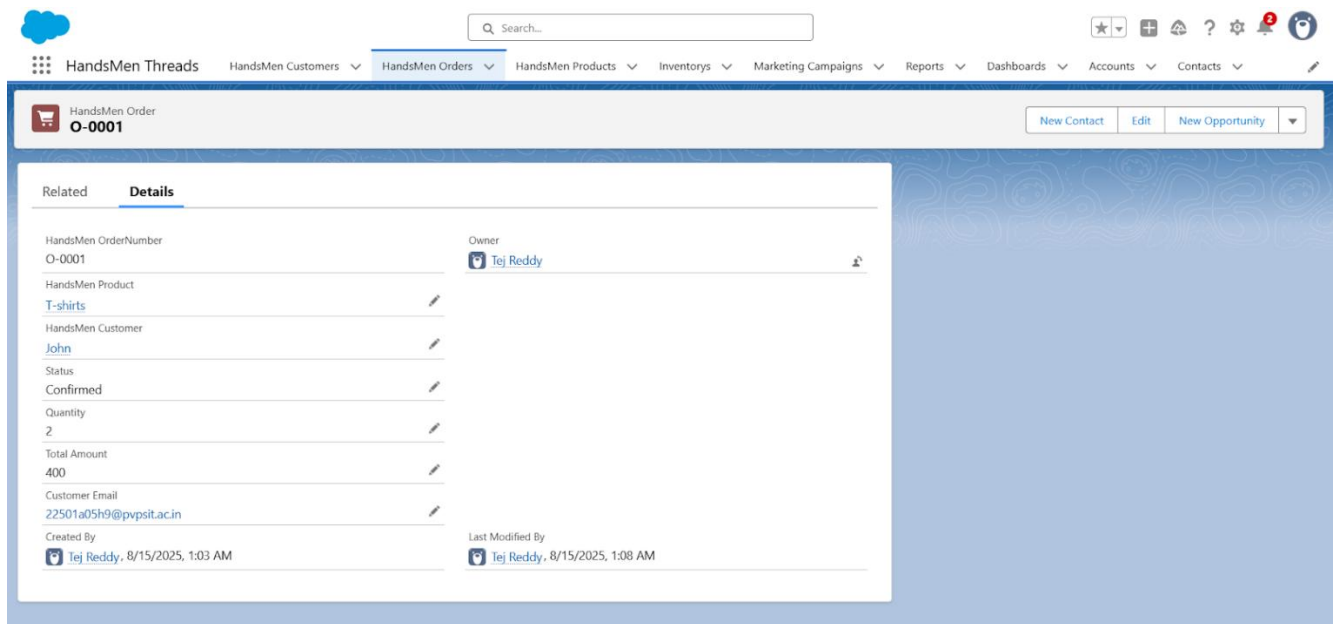


Fig: Order Confirmation

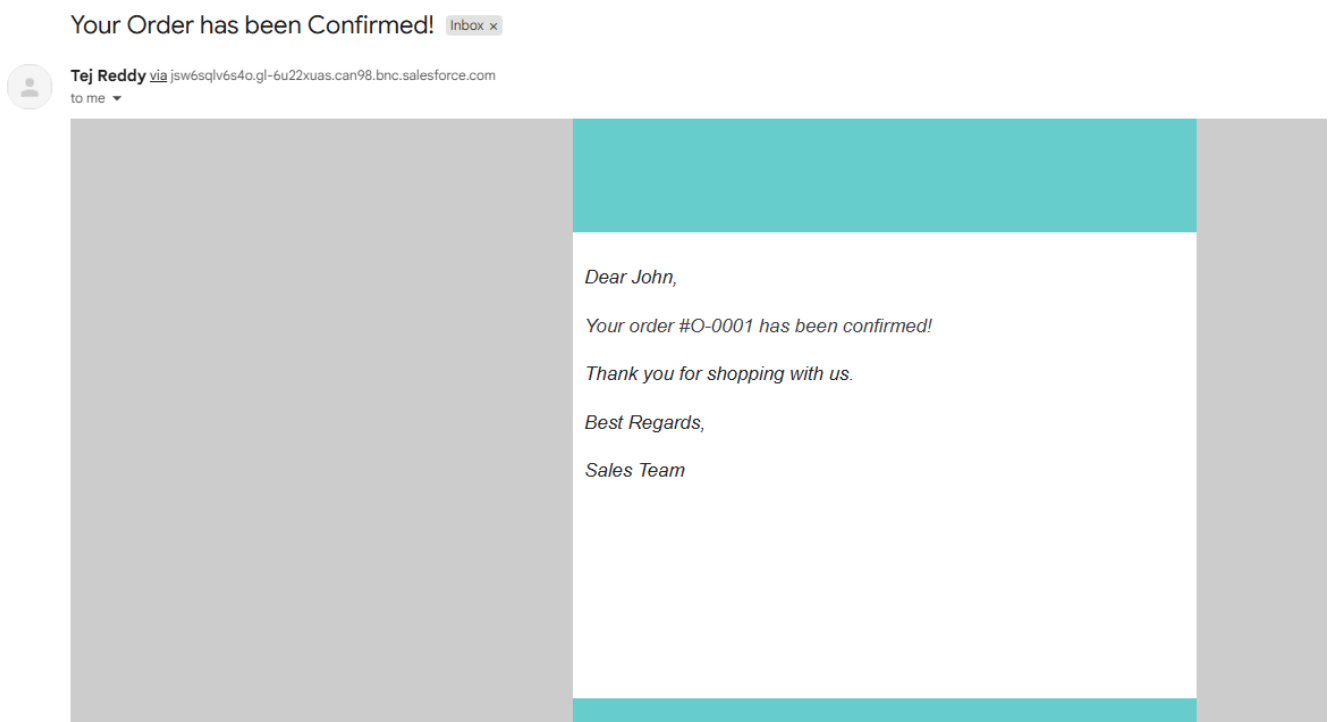


Fig: Order Confirmation Email Sent to Customer

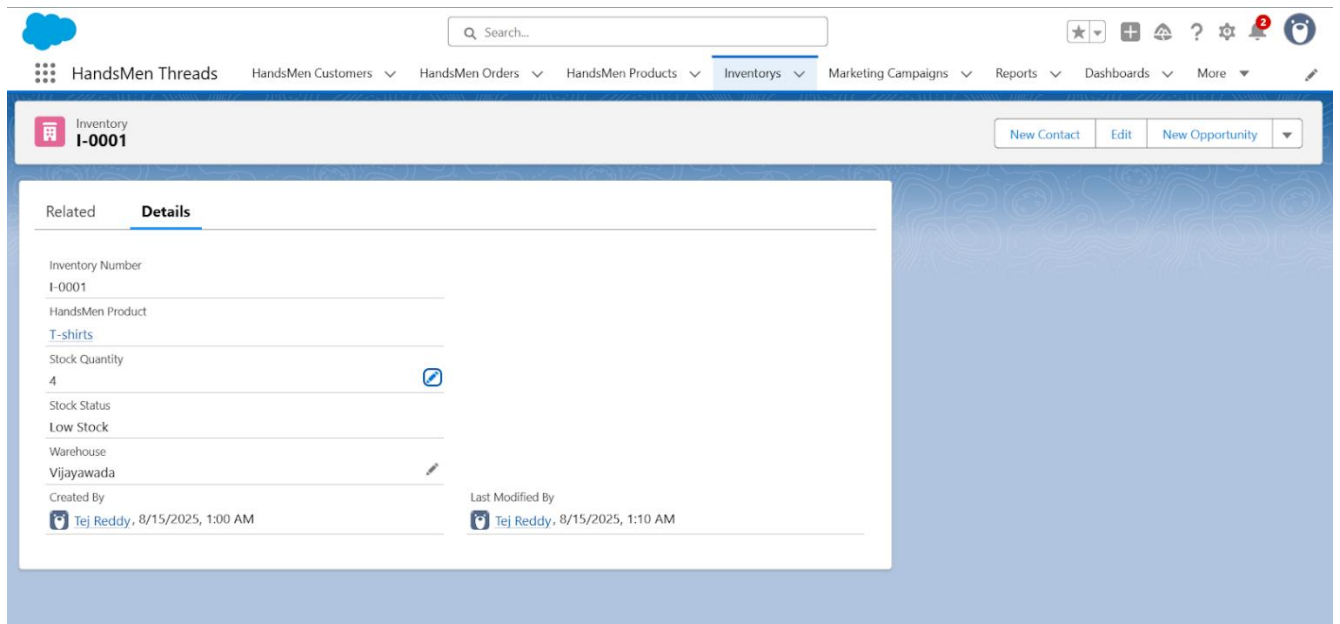


Fig: Inventory Creation

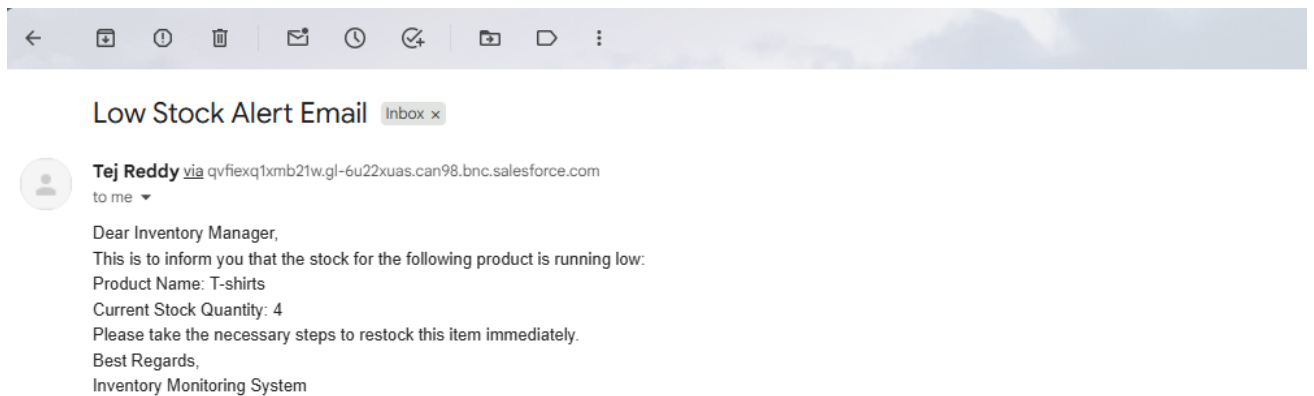


Fig: Low Stock Alert

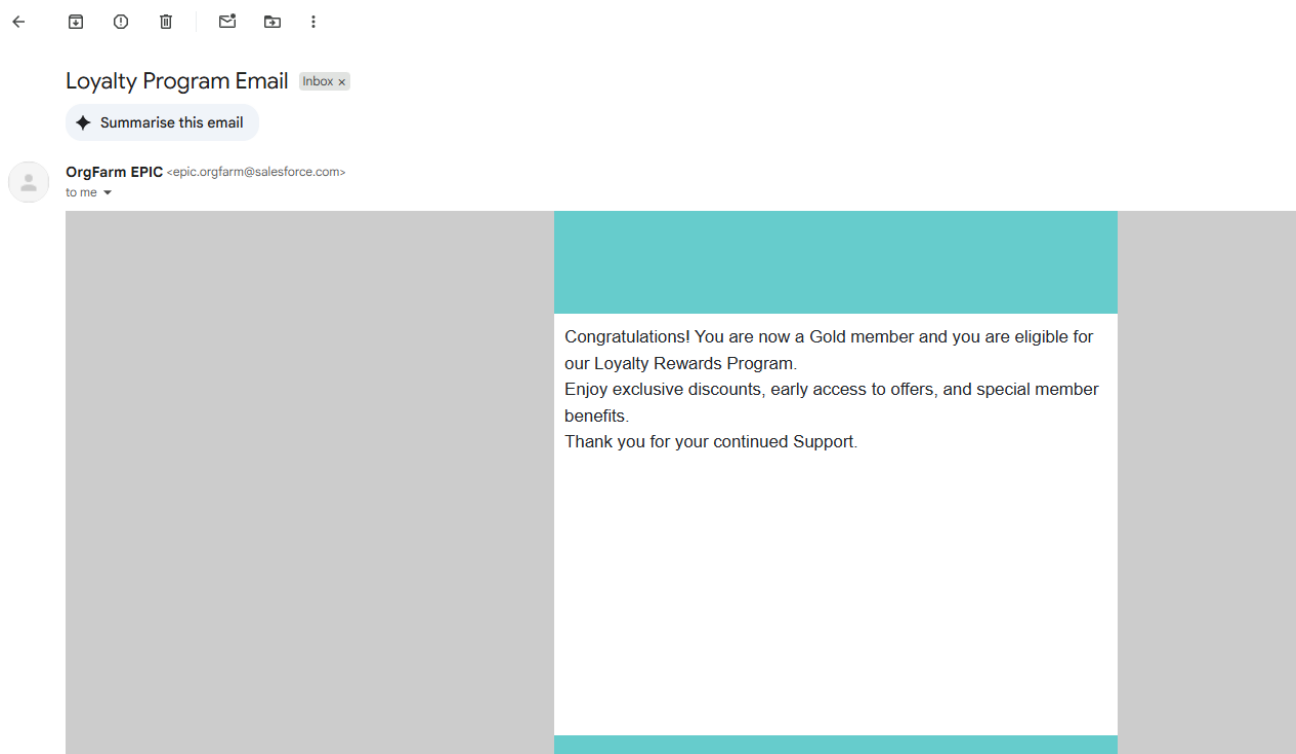


Fig: Customer Mail Showing Updated Loyalty Status

CONCLUSION

The deployment of Salesforce CRM has greatly strengthened the operational framework of HandsMen Threads. The solution effectively oversees essential business activities, nurtures meaningful customer relationships, and maintains high standards of data integrity across sales, inventory, and marketing domains. By utilizing Salesforce's advanced capabilities — including custom objects, automated flows, comprehensive validation rules, timely alerts, and tailored Apex development — we have built a fully integrated platform. This system delivers real-time insights, empowers informed strategic decisions, and lays a durable foundation for sustained growth and elevated customer experiences.

FUTURE SCOPE

Our future plans for the HandsMen Threads CRM focus on expanding its functionality to create a more comprehensive and powerful system. Our next steps include:

- **Self-Service Customer Portal:** Establishing an exclusive online portal will give customers the independence to handle many of their own needs. Through this portal, they can independently check their order history, review their loyalty points, edit their profile, and find answers to their questions.
- **Dedicated Mobile Application:** Utilizing the Salesforce Mobile SDK, we will engineer a purpose-built mobile application for our in-store staff. This tool will streamline crucial tasks like managing inventory, fulfilling orders, and retrieving customer information directly from a mobile device.
- **Sophisticated Dashboards & Reports:** We intend to create sophisticated sales and inventory dashboards within Salesforce. These intuitive and dynamic dashboards will provide increased visibility into our performance, help us to better recognize market trends, and facilitate the development of strategic business plans.
- **AI-Powered Personalization (Salesforce Einstein):** The integration of Salesforce Einstein will enable us to deliver unique product recommendations. By analyzing customer purchase history and the habits of similar customers, we

can present highly relevant suggestions that will significantly increase our sales potential.

- **Direct Messaging Capabilities:** Connecting the CRM with popular messaging services like SMS and WhatsApp will allow us to send timely and personalized messages. This includes instant order confirmations, shipping updates, announcements about our loyalty programs, and targeted marketing campaigns sent directly to our customers' phones.