

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

ABSTRACT

This document outlines the development of a customized Salesforce CRM system for HandsMen Threads, a leading men's fashion brand. The main objective of this initiative was to simplify the management of customer data, order processing, inventory control, and marketing activities as the business continued to grow. By utilizing Salesforce's cloud-based platform, key business processes were automated, data accuracy was maintained, and teams gained real-time visibility into operational performance.

The solution incorporates custom objects, automated flows, validation rules, email alerts, and Apex implementations designed to enhance customer engagement, increase sales efficiency, minimize stock-related issues, and provide comprehensive insight into overall business operations.

OBJECTIVE

The primary goal of this development project was to design and implement a Salesforce CRM system that supports seamless daily operations and enhances the customer experience at HandsMen Threads. Specifically, the objectives include:

- **Automating routine tasks** such as sending order confirmations, updating customer loyalty tiers, and triggering low-stock notifications.
- **Ensuring high data accuracy and consistency** through well-defined validation rules.
- **Providing instant visibility** into inventory levels, customer interactions, and sales performance.
- **Improving collaboration and communication** among the sales, inventory, and marketing teams.
- **Delivering more personalized customer experiences** through automated messages and loyalty program features.

TECHNOLOGY DESCRIPTION

Salesforce Platform

Salesforce functions as the core system supporting our operational processes. It is a cloud-based Customer Relationship Management (CRM) platform that enables comprehensive management of customer-related data and activities. The platform provides a wide range of tools that automate business tasks, enhance customer service, support marketing optimization, and improve sales performance. In this project, we utilized both Salesforce's intuitive drag-and-drop configuration features and its advanced development capabilities, including Apex and Flow, to address more complex requirements.

Custom Objects

Custom Objects serve as tailored data structures within Salesforce, designed specifically to store information relevant to HandsMen Threads. These include:

- **Customer__c:** Stores detailed information about each customer, including personal data, contact information, and loyalty status.
- **Product__c:** Contains product-related details such as name, description, price, and current inventory levels.
- **Order__c:** Records customer orders, linking them to the respective customer and products, along with information such as order date, total amount, and quantity.
- **Marketing_Campaign__c:** Tracks marketing activities and promotional initiatives to evaluate their effectiveness.

Tabs

Tabs act as accessible navigation points for users. We created custom tabs for each custom object (e.g., Products, Orders) to enable team members to easily view, create, and manage records directly within the "HandsMen Threads" application.

Custom App

A custom Lightning App titled "**HandsMen Threads**" was developed to serve as the main workspace for the team. This application consolidates key tabs—such as Customer, Order, Product, Inventory, Campaign, and Reports—into a single interface, ensuring a streamlined and efficient workflow.

Profiles & Roles

Profiles and Roles are essential components for managing user access and system security:

- **Profiles:** Profiles define the permissions assigned to a user, including which objects and fields they can access and how their interface appears. We created custom profiles—such as the *HandsMen Sales Profile*—to align permissions with specific job responsibilities.
- **Roles:** Roles determine data visibility based on the organizational hierarchy. For example, a *Sales Manager* can view all sales-related data, while a *Sales Representative* can only view records assigned to them. The role structure also clarifies reporting relationships within the system.

Permission Sets

Permission Sets act as additional permission layers that extend a user's access beyond what their profile provides. They allow us to grant specific capabilities to users without altering their primary profile, providing more granular control over system permissions.

Validation Rules

Validation Rules function as quality control mechanisms that ensure data accuracy and consistency before records are saved. Examples include:

- Enforcing proper email formatting to ensure entries follow a valid structure (e.g., containing “@gmail.com”).
- Blocking the submission of an order if fulfilling it would result in negative inventory levels.

Email Templates & Alerts

These components support standardized and automated communication:

- **Email Templates:** Professionally designed templates—such as the *Order Confirmation* template—ensure consistent formatting and messaging across all outgoing emails.
- **Email Alerts:** Automated email notifications triggered by specific conditions, such as the creation of a new order or an update to a customer's loyalty status.

Flows

Flows serve as Salesforce's visual automation tools, allowing us to implement complex business processes without writing code. Several key flows were developed for this system, including:

- **Email Notification Flow:** Automatically sends an order confirmation email to the customer as soon as a new order is created.
- **Stock Alert Update Flow:** Updates product inventory levels whenever an order is created or modified.
- **Scheduled Loyalty Update Flow:** Executes on a daily schedule (e.g., at midnight) to evaluate and update customer loyalty status based on their total purchase amounts.

Apex

Apex is Salesforce's programming language, used to create custom logic when standard configuration tools are not sufficient. We implemented several Apex triggers to support system functionality:

- **Order Total Trigger:** Automatically calculates and updates the *Total_Amount__c* field on an order based on product quantity and unit price.
- **Stock Deduction Trigger:** Ensures product inventory is accurately reduced once an order is confirmed. This trigger works alongside validation rules to prevent overselling.
- **Loyalty Status Trigger:** Dynamically updates the *Loyalty_Status__c* field on a customer record in real time, based on their cumulative purchase history.

DETAILED PROJECT EXECUTION

1. Salesforce Developer Org Setup

Set up a new Salesforce Developer Org at <https://developer.salesforce.com/signup>, serving as the primary environment for all configuration and development activities.

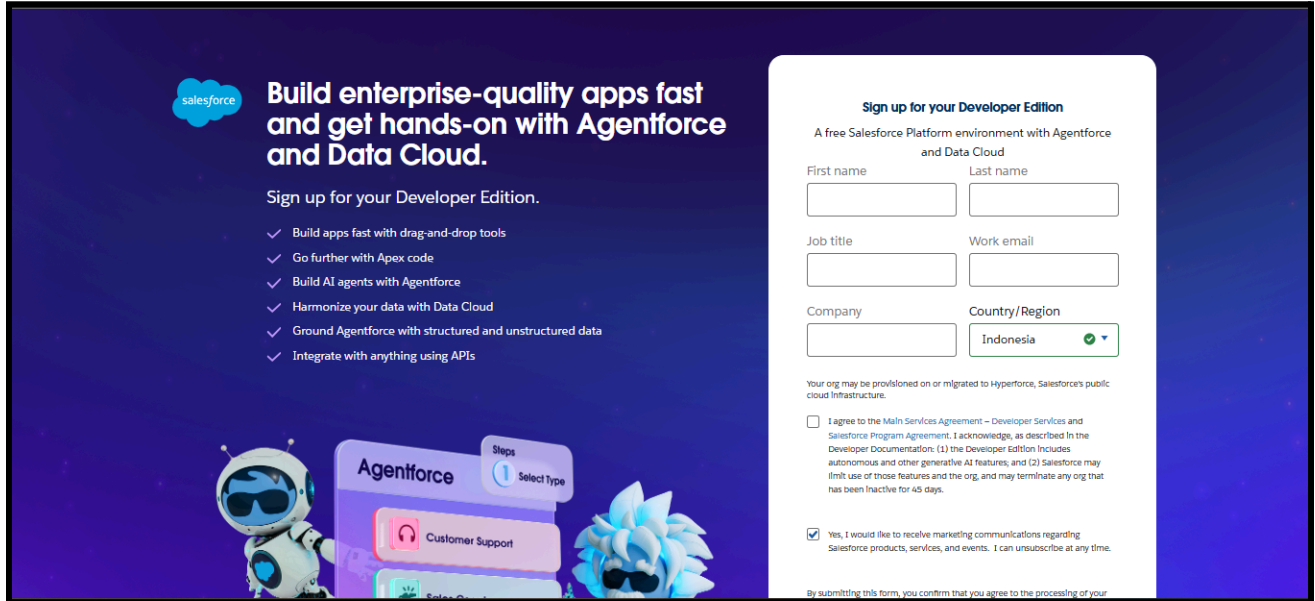


Fig: Salesforce Developer Edition

2. Custom Object Creation

The core data model was established by creating custom objects and fields to store essential business information:

- **HandsMen Customer (Customer__c):** Stores customer data such as Name, Email, Phone, Address, and Loyalty_Status__c.
- **HandsMen Product (Product__c):** Contains product-related details including Name, Description, Unit_Price__c, and Stock__c.
- **HandsMen Order (Order__c):** Records customer orders, including Order Date, Quantity__c, Total_Amount__c, and lookup relationships to Customer__c and Product__c.
- **Marketing Campaign (Marketing_Campaign__c):** Used to record promotional and marketing activities.

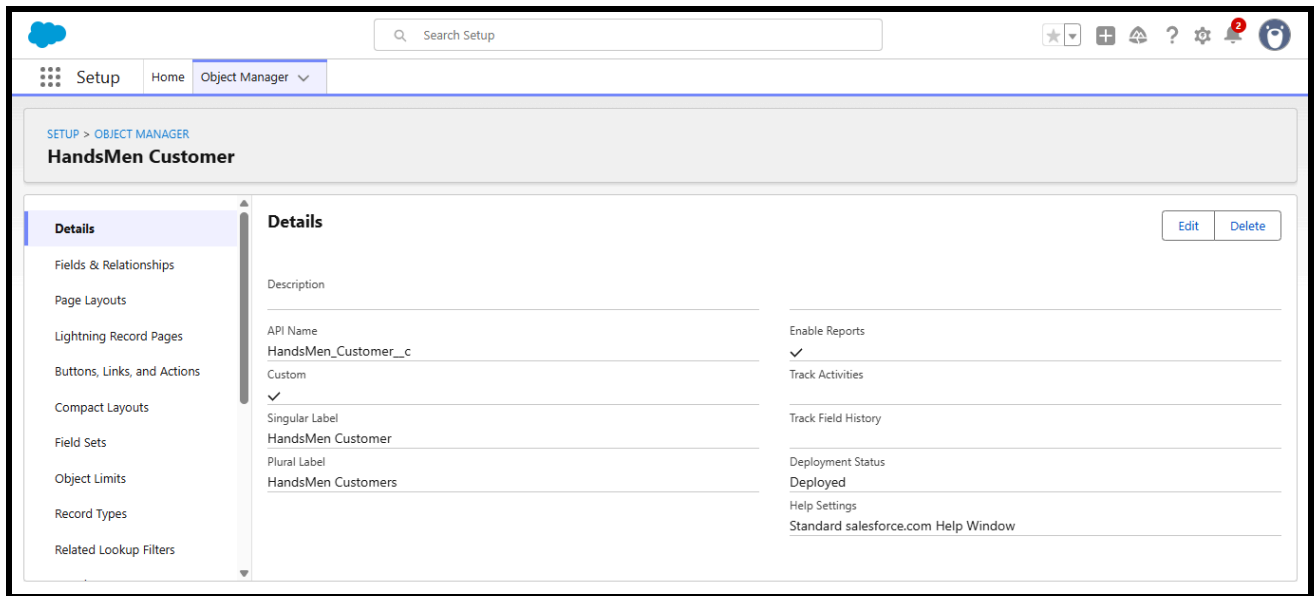


Fig: Custom Object HandsMen Customer

3. Custom Lightning App

A custom Lightning App named “**HandsMen Threads**” was developed. This app consolidates key tabs—including Customer, Order, Product, Inventory, Campaign, and Reports—into a unified workspace to streamline user navigation and daily operations.

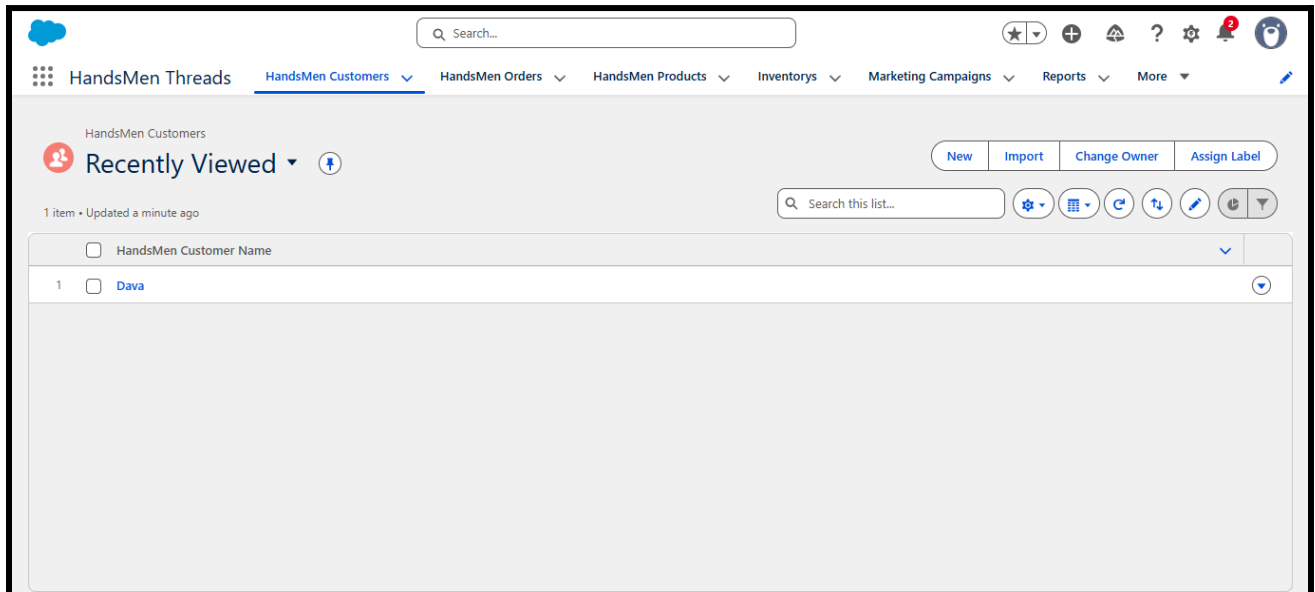


Fig: HandsMen Threads Custom App

4. Validation Rules

Several validation rules were implemented to maintain data accuracy and consistency:

- **Product Stock Rule:** Ensures the Stock__c field cannot be set to a value below zero.
- **Customer Email Rule:** Requires that the Email field contains valid formatting, such as including “@gmail.com”.

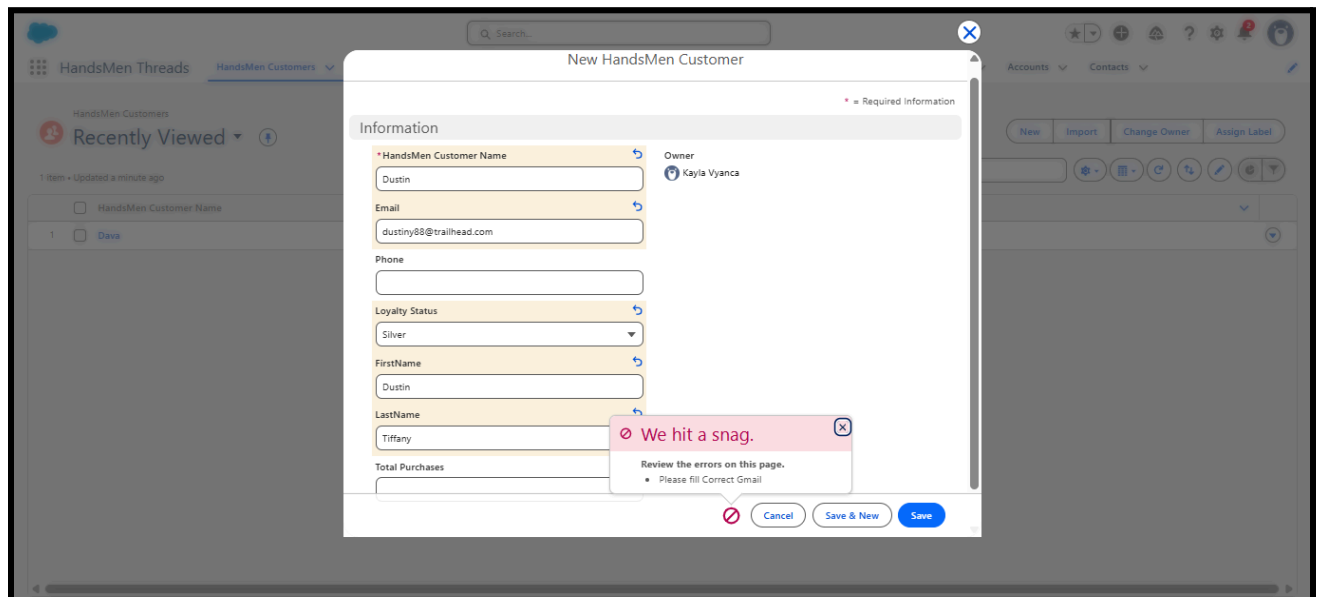


Fig: Customer Email Validation

5. User Profiles & Roles

Profiles and roles were configured to manage system access and control data visibility:

- **Profiles:** The Standard User profile was cloned to create custom profiles such as the *HandsMen Sales Profile*.
- **Roles:** A role hierarchy was established with positions like *Sales Manager* and *Inventory Manager*, ensuring visibility is aligned with organizational responsibilities.

6. User Creation

Users were created and assigned to their respective profiles and roles—for example, **Niklaus Mikaelson** under Sales and **Kol Mikaelson** under Inventory—to demonstrate system functionality in a multi-user environment.

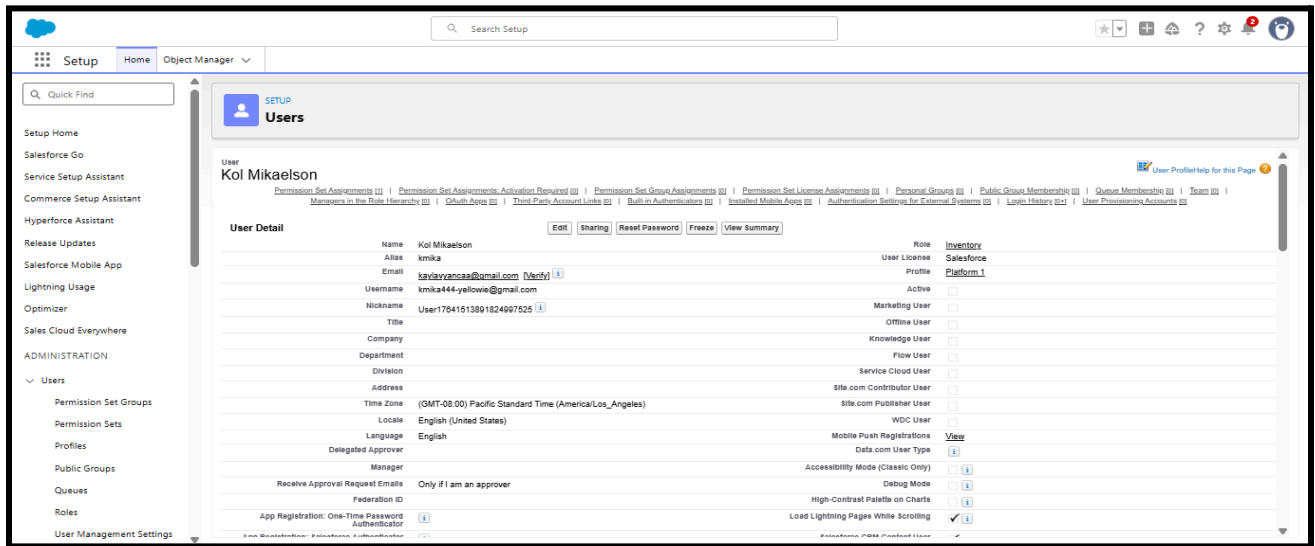


Fig: User Kol Mikaelson

7. Email Templates

Custom email templates were designed to support consistent and automated communication, including templates for “Order Confirmation” and “Loyalty Status Update.”

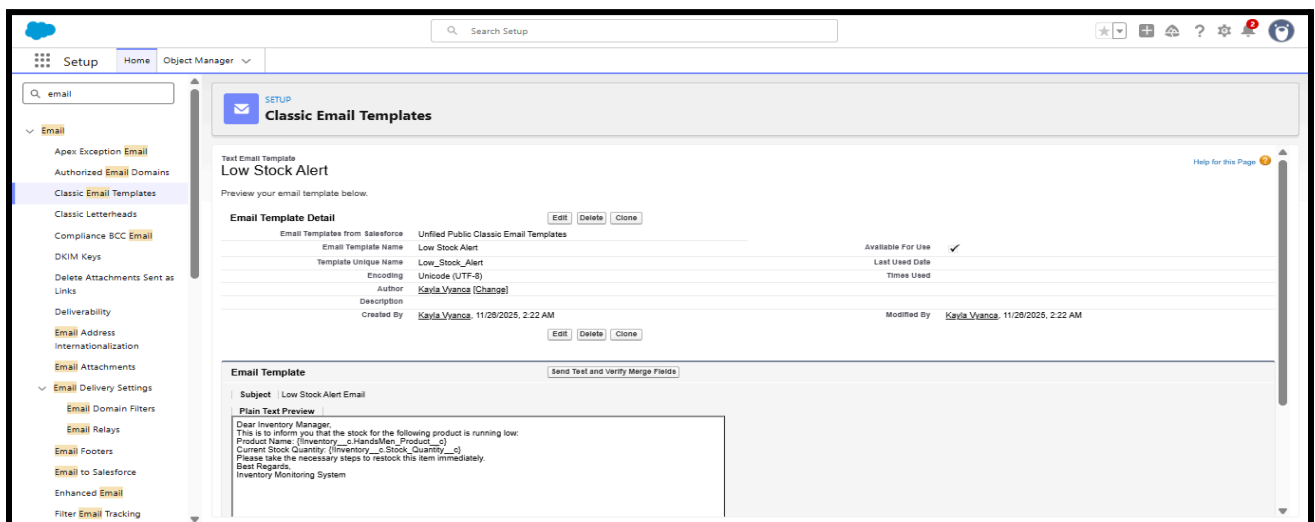


Fig: Classic Email Template

8. Flow Implementations

- **Order Confirmation Flow (Record-Triggered):** This flow automatically sends an order confirmation email to the customer whenever a new order record is created.

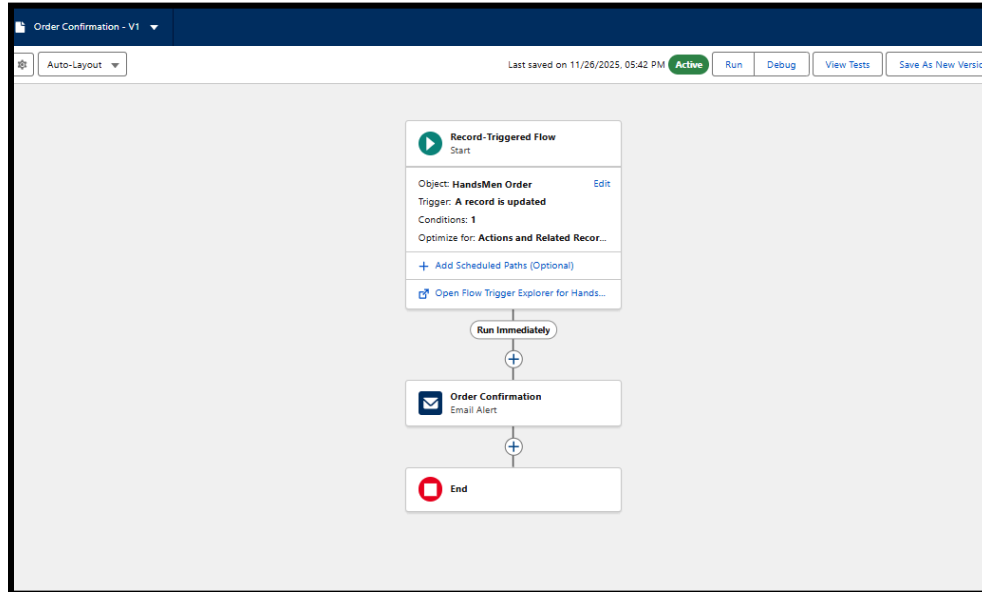


Fig: Order Confirmation Flow

- **Low Stock Alert Flow (Record-Triggered):** This flow updates the product's stock level whenever an order is created or modified, ensuring inventory data remains accurate.

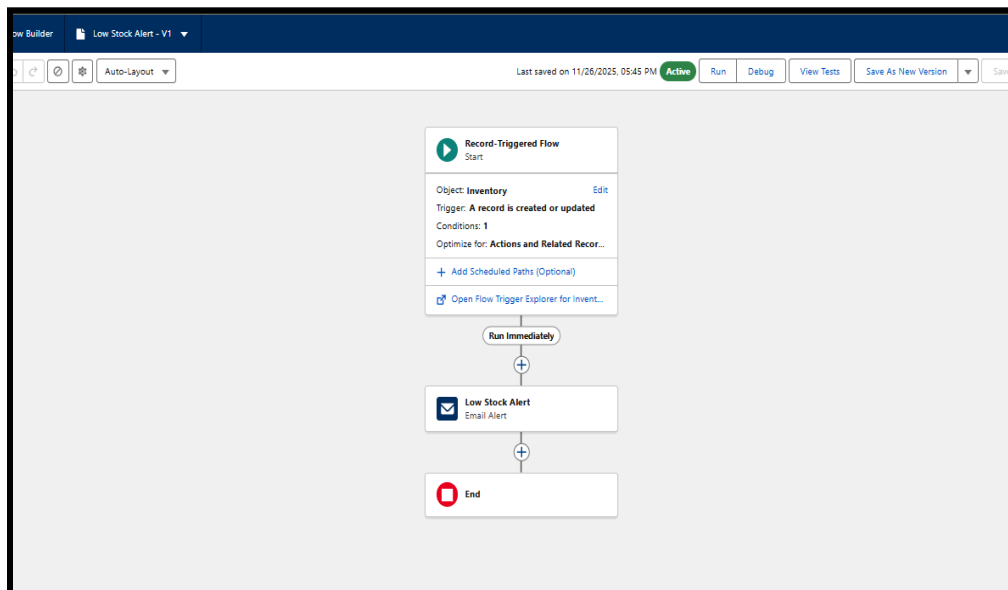


Fig: Low Stock Alert Flow

- **Loyalty Update Status Flow (Scheduled-Triggered):** This scheduled flow runs daily and evaluates customers' total purchase amounts to update their loyalty status accordingly.

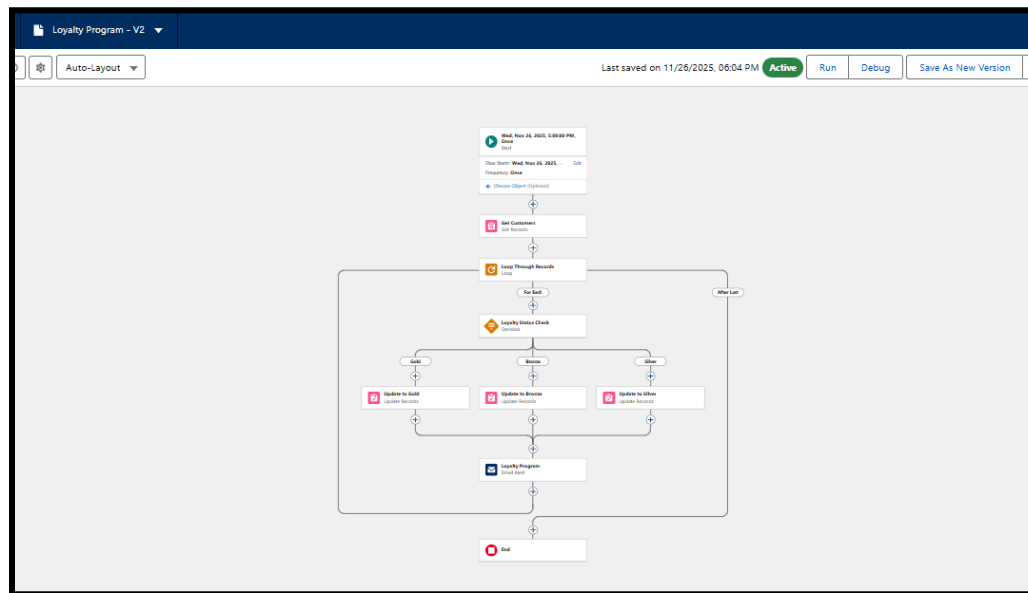


Fig: Loyalty Update Flow

9. Apex Triggers

- **Order Total Trigger (OrderTrigger):** This trigger calculates and updates the *Total_Amount__c* field on an order by multiplying the quantity with the unit price.
- **Stock Deduction Trigger (ProductStockUpdateTrigger):** This trigger adjusts product stock levels once an order is confirmed, ensuring inventory decreases correctly and preventing inconsistencies.
- **Loyalty Status Trigger (CustomerLoyaltyUpdateTrigger):** This trigger updates the *Loyalty_Status__c* field on the customer record in real time, based on their accumulated purchase history.

The following example illustrates how the integrated Salesforce CRM processes work together during a typical customer journey at HandsMen Threads.

1. Customer Registration

A new customer—*Dava Syafei*—visits the store.

- The sales representative opens the **HandsMen Customer** tab and selects “**New**” to enter Dava’s information, including Name, Phone Number, and Email (e.g., *dava.syafei@gmail.com*).
- **Validation Rule in Action:** If the representative enters an invalid email such as *asdava.syafei@trailhead.com*, the system immediately displays an error message: “*Please enter a valid Gmail address.*” This ensures accurate and standardized data entry.

Once the correct information is provided, Dava Syafei is successfully added to the system.

2. Product Setup

- The inventory manager ensures that all available products are properly listed in the **HandsMen Product** tab.
- For example, the product “**Jacket –Red Wine**” is registered with a unit price of **\$500** and an inventory count of **10** units.

3. Order Placement

Dava decides to purchase three of the “**Jacket –Red Wine**” items.

- The sales representative creates a new order through the **HandsMen Order** tab.
- Dava Syafei is selected as the customer, the product is added, and a quantity of **3** is entered.
- **Apex Trigger in Action:** Upon saving the order, the **OrderTotalTrigger** automatically calculates the *Total_Amount__c* field as **\$1500** ($3 \times \500), eliminating manual calculation.
- **Email Notification Flow in Action:** Immediately after the order is saved, the system sends an automated **Order Confirmation** email to Dava’s Gmail address.

4. Inventory Update

- **Stock Update Flow in Action:** Once the order is recorded, the stock value for the “Jacket –Red Wine” automatically decreases from **10** to **7**.
- **Validation Rule in Action:** If the representative attempts to order more units than available—e.g., 11 jacket when only 10 exist—the system prevents the order from being saved, ensuring stock accuracy and preventing overselling.

5. Loyalty Status Update

- **Apex Trigger in Action:** After Dava Syafei’s order is processed and the *Total_Amount__c* field is updated, the **CustomerLoyaltyUpdateTrigger** recalculates his cumulative purchase history. If his total spending meets the threshold for a new tier—such as **Gold Member**—his *Loyalty_Status__c* is updated immediately.
- **Scheduled Flow in Action:** In addition, the **Scheduled Loyalty Update Flow** runs daily to verify and update loyalty statuses. This ensures that any missed or delayed updates are corrected automatically.

This end-to-end scenario demonstrates how the Salesforce CRM solution efficiently supports customer onboarding, product management, order processing, inventory control, and loyalty program management—all in a seamless and automated workflow.

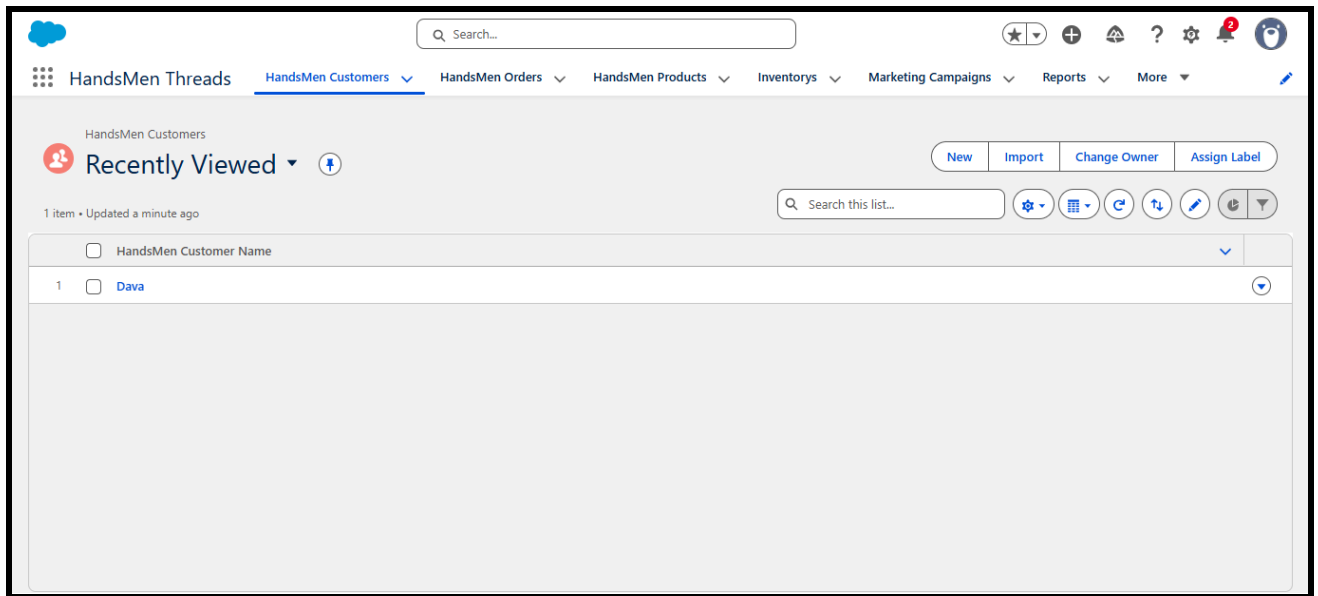


Fig: Custom App for HandsMen Threads

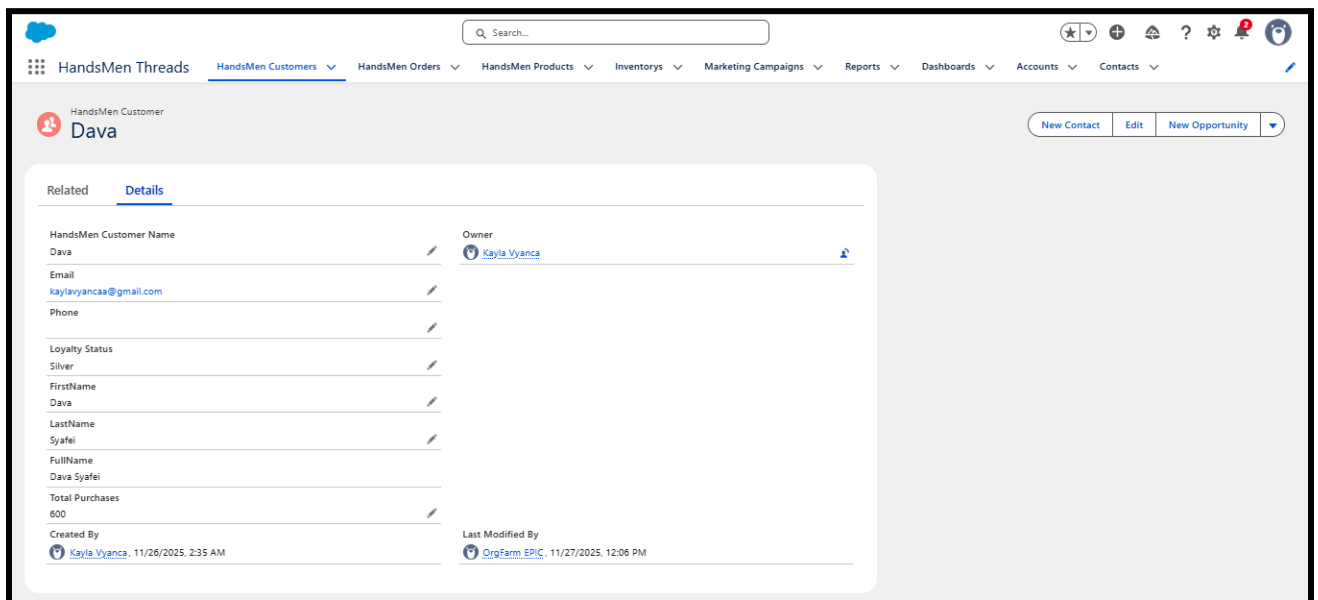


Fig: Customer Creation in HandsMen Threads

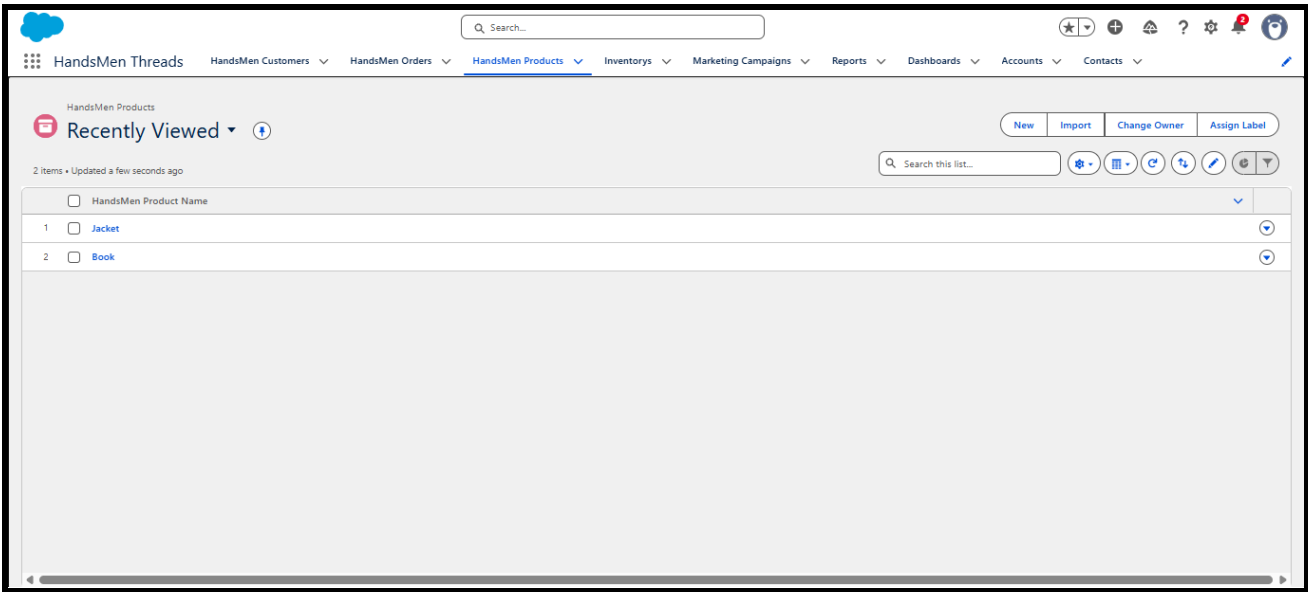


Fig: Products in HandsMen Threads

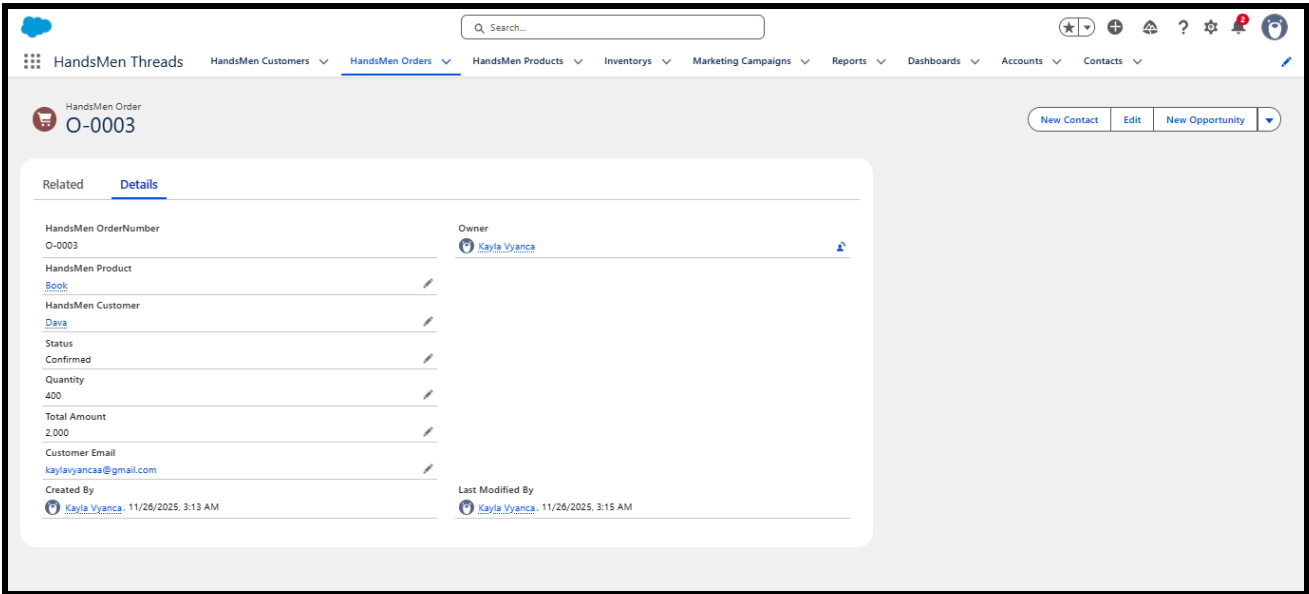


Fig: Order Confirmation

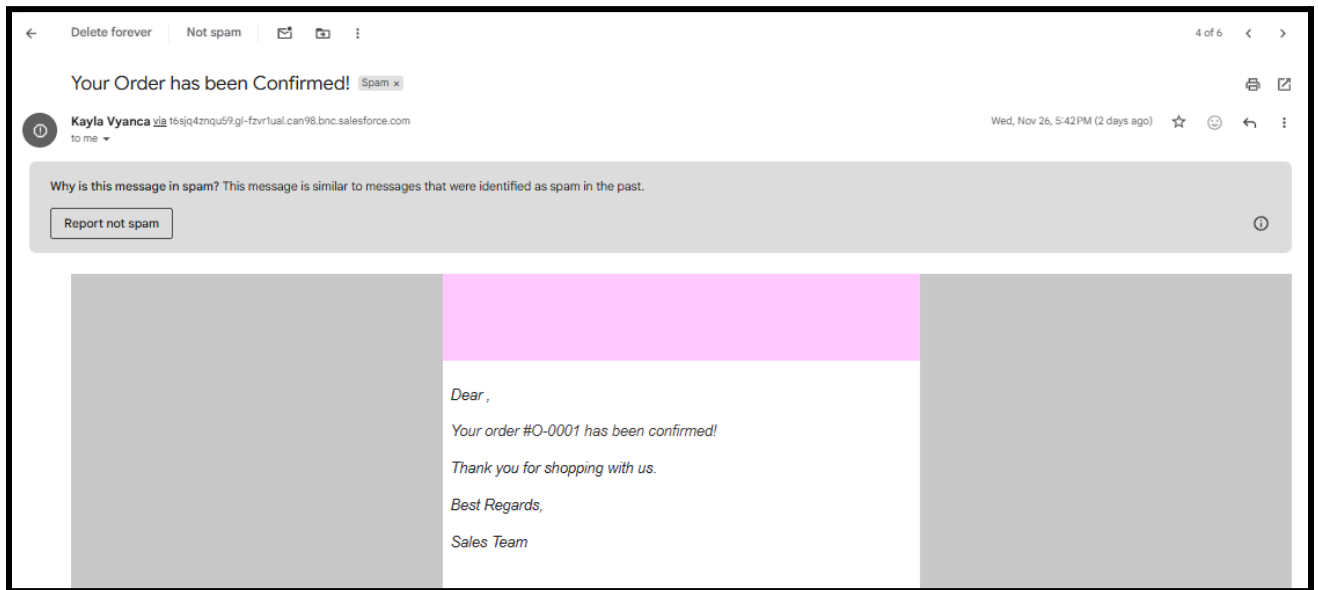


Fig: Order Confirmation Email

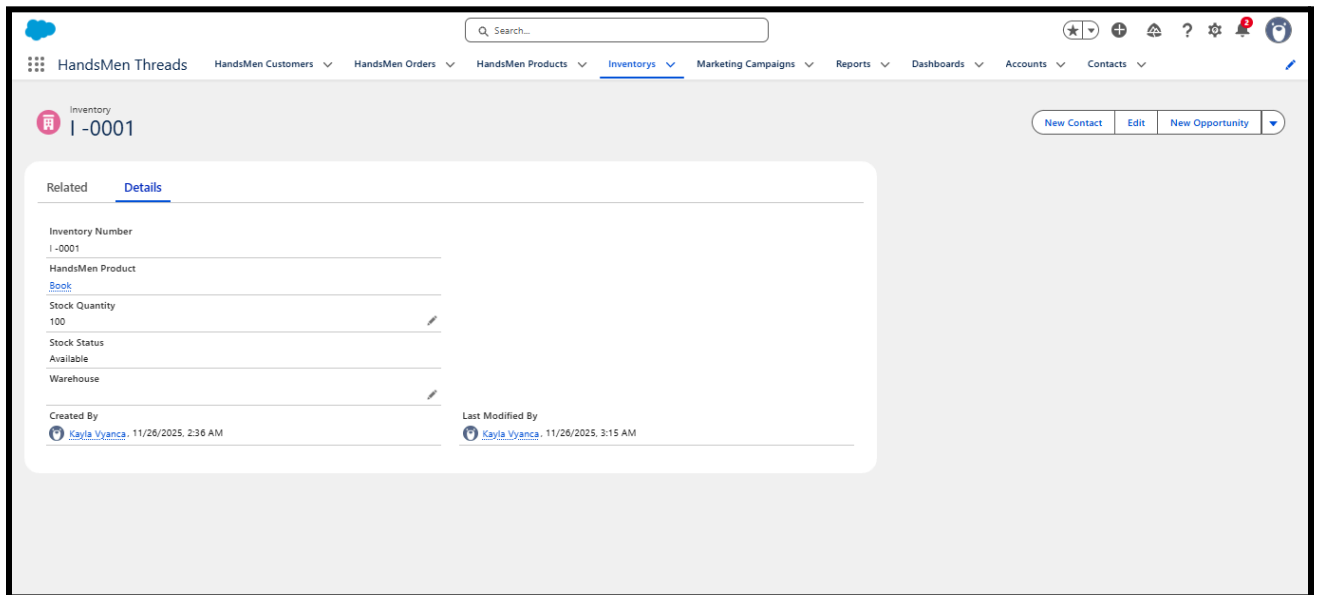


Fig: Inventory Creation



Fig: Low Stock Alert Email

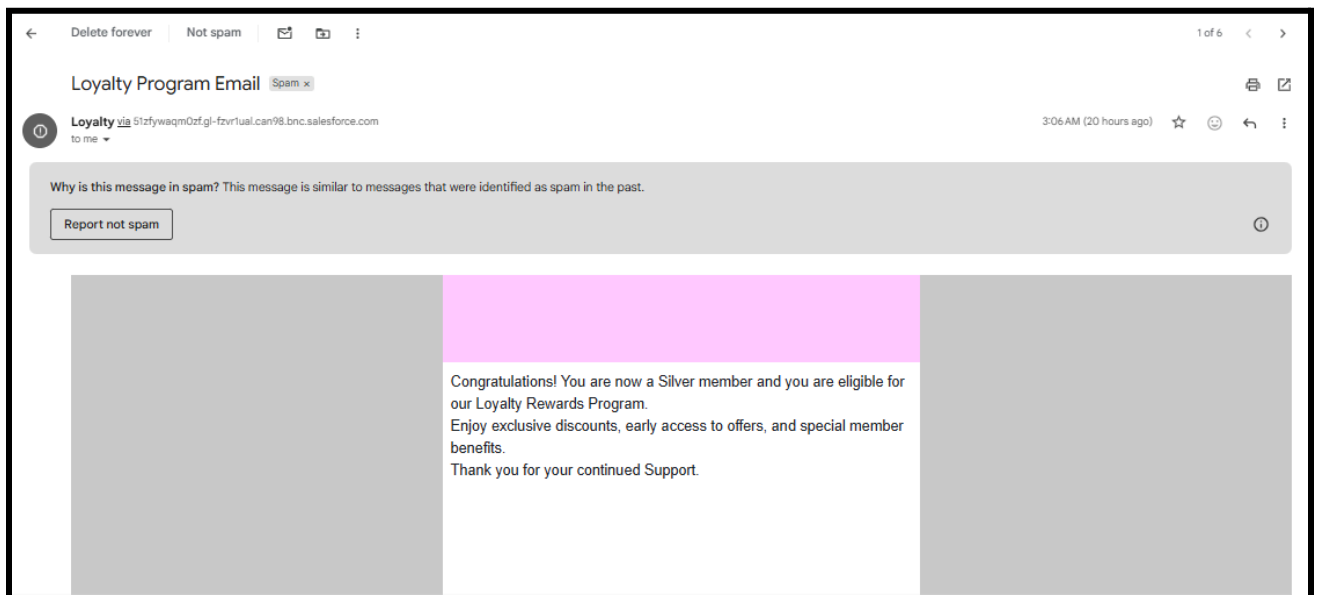


Fig: Updated Loyalty Status Email

CONCLUSION

The Salesforce CRM developed for HandsMen Threads represents a significant improvement in managing core business operations. It strengthens customer relationships, ensures high data accuracy, and supports seamless coordination across sales, inventory, and marketing functions. By leveraging Salesforce's capabilities—such as custom objects, automated flows, validation rules, email alerts, and Apex code—we built an integrated system that provides real-time insights, supports informed decision-making, and establishes a strong foundation for future business growth and enhanced customer experiences.

FUTURE SCOPE

Further enhancements can be implemented to expand the capabilities of the HandsMen Threads CRM:

- **Customer Portal:** Development of a self-service portal where customers can view past orders, track loyalty points, update personal information, and access support independently.
- **Mobile Application:** Creation of a mobile app using the Salesforce Mobile SDK to enable store staff to manage inventory, process orders, and access customer information directly from their mobile devices.
- **Messaging Integration:** Connecting Salesforce with messaging platforms such as WhatsApp or SMS to deliver real-time order updates, shipping notifications, loyalty program information, and personalized marketing messages directly to customers.