

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

Abstract

In today's fast-moving fashion industry, especially in bespoke tailoring, staying organized and responsive to customer needs is essential. *HandsMen Threads* is a custom-built Salesforce CRM solution designed to help boutique men's fashion businesses streamline operations. From managing customer profiles and orders to monitoring inventory and automating alerts, this platform combines the best of Salesforce's no-code tools and Apex code to drive smart, efficient tailoring experiences.

Objectives

- Build a Salesforce CRM app specifically for the bespoke men's fashion segment.
 - Automate key business processes like order management, inventory updates, and customer communications.
 - Deliver a personalized customer journey through loyalty tiers and targeted email interactions.
 - Use Apex code to support dynamic calculations and logic that extend standard Salesforce functionality.
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Introduction

I'm pleased to introduce my Salesforce CRM project, **HandsMen Threads: Elevating the Art of Sophistication in Men's Fashion**. In the world of personalized tailoring, businesses often face challenges in managing custom orders, tracking stock, and keeping customers engaged. This project addresses those needs by providing an integrated platform built entirely on Salesforce. It simplifies backend workflows, enhances the customer journey with personalization, and demonstrates the impact of combining declarative Salesforce tools with powerful custom logic.

1. Project Overview

HandsMen Threads is a bespoke tailoring solution built on the Salesforce CRM platform. The primary goal of the project is to streamline the men's fashion tailoring process, improve customer experience with personalized engagement, and automate back-office operations like inventory tracking and order management.

This application leverages Salesforce's powerful suite of tools including Custom Objects, Apex Triggers, Record-Triggered Flows, Scheduled Flows, and Email Alerts to create a seamless, intelligent CRM solution tailored for the men's fashion domain.

2. Custom Objects and Relationships

In Salesforce, **custom objects** are user-defined data structures that allow you to store information unique to your business. While standard objects like Accounts, Contacts, and Opportunities are built into Salesforce, they don't always align with the specific needs of niche industries—especially a tailored business-like bespoke men's fashion. That's where custom objects come in.

For the *HandsMen Threads* project, custom objects were essential to model the core elements of the tailoring workflow—customers, orders, inventory, and products—in a way that reflects how a real-world tailoring business operates. These objects allow for flexibility, control, and detailed tracking that simply isn't possible with standard objects alone.

Why We Used Custom Objects

- To represent business-specific entities like **Orders**, **Products**, and **Inventory**, which don't exist in standard Salesforce CRM by default.
- To capture unique fields such as fabric types, sizes, prices, quantities, and stock levels.
- To enable relationships between tailoring operations—such as linking a customer to their order, or an order to a specific product.
- To allow automation and Apex logic to run seamlessly on tailor-made data models.

Custom Objects Used in the Project

1. HandsMen_Customers__c

- **Purpose:** Stores all customer-related information including name, email, phone number, and loyalty tier.
- **Use:** This object is the backbone of the CRM—every order is linked to a customer record. It helps in segmentation, personalization, and tracking customer value.

2. HandsMen_Orders__c

- **Purpose:** Captures all details related to customer orders, including order status, quantity, total amount, and product reference.
- **Use:** Key for workflow automation. Triggers and flows use this object to update inventory, send emails, and calculate order totals dynamically.

3. HandsMen_Products__c

- **Purpose:** Represents the product catalog—suits, shirts, fabrics, accessories—with fields for product name, price, SKU, and description.
- **Use:** Used in every order to fetch product prices, calculate totals, and link to inventory.

4. Inventory__c

- **Purpose:** Tracks real-time stock for each product.
- **Use:** When a customer places an order, flows reduce the available stock automatically. Low inventory triggers scheduled alerts to the manager.

5. Campaigns (Standard Object)

- **Purpose:** Supports marketing efforts like seasonal offers, festive discounts, or promotional bundles.
- **Use:** Enhances customer engagement and drives repeat business.

Relationships Between Custom Objects

- **Lookup Relationship:** Orders are connected to both Customers and Products through lookup fields. This enables a single customer to have multiple orders and allows each order to be tied to a specific product.
- **Inventory Link:** Inventory is linked to Products, ensuring accurate stock levels are maintained automatically after every order.

3. Core Functionalities

Customer Creation

To bring new customers into the system, users can head to the **HandsMen Customers** tab and click on “**New.**” Here, they’ll fill out details like the customer’s:

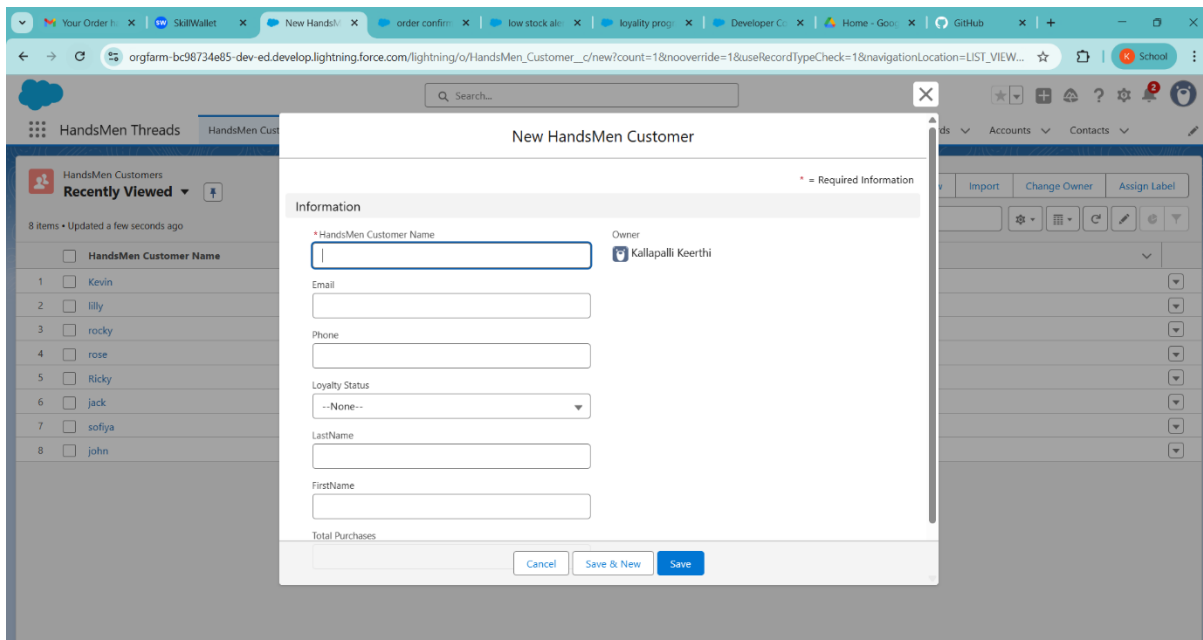
- Full Name
- Contact Number
- Email Address
- Physical Address

Validation Rule:

Only Gmail addresses are accepted. This ensures a consistent and standardized format, making future communication (like promotional emails) smoother and more reliable.

Once the profile is saved, the customer becomes part of the system — ready to place orders and start earning loyalty points based on their purchases.

Given below fig1 shows the new customer creation tab



The screenshot shows a web application interface for creating a new customer. The browser address bar displays a Salesforce Lightning URL. The page title is "New HandsMen Customer". The form is titled "Information" and includes the following fields:

- *HandsMen Customer Name**: A required text input field.
- Email**: A text input field.
- Phone**: A text input field.
- Loyalty Status**: A dropdown menu with "--None--" selected.
- LastName**: A text input field.
- FirstName**: A text input field.
- Total Purchases**: A text input field.

The form also displays the **Owner** as "Kallapalli Keerthi". At the bottom right, there are three buttons: "Cancel", "Save & New", and "Save". The background shows a sidebar with "HandsMen Customers" and a "Recently Viewed" list containing names like Kevin, Billy, rocky, rose, Ricky, jack, sofya, and john.

Fig1: New HandsMen Customer

Product and Inventory Setup

Every fashion business needs a clear product catalog. That's where the **HandsMen Products** and **Inventory** objects come in.

- Users navigate to the **HandsMen Products** tab to add a new item.
- Each product has fields like **Name**, **Category**, **SKU (Stock Keeping Unit)**, and **Price**.
- After a product is created, an associated **Inventory** record is also added using a **lookup relationship**.

In fig2 we can see how new product is created

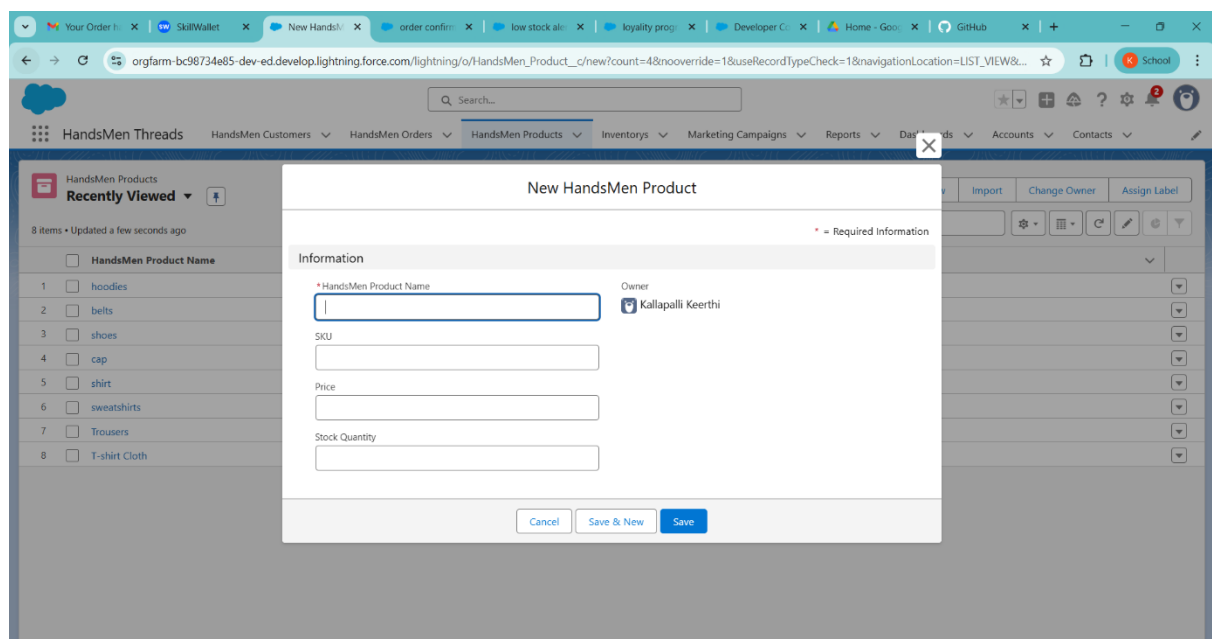
The image shows a web browser window displaying the Salesforce interface. The main navigation bar at the top includes tabs for 'HandsMen Threads', 'HandsMen Customers', 'HandsMen Orders', 'HandsMen Products' (which is currently selected), 'Inventories', 'Marketing Campaigns', 'Reports', 'Dashboards', 'Accounts', and 'Contacts'. A search bar is located on the left side of the navigation bar. The main content area is titled 'New HandsMen Product'. It features a 'Recently Viewed' section on the left with a list of 8 items: hoodies, belts, shoes, cap, shirt, sweatshirts, Trousers, and T-shirt Cloth. The central form is titled 'Information' and contains several input fields: 'HandsMen Product Name' (with an asterisk indicating it is required), 'SKU', 'Price', and 'Stock Quantity'. The 'Owner' field is pre-filled with 'Kallapalli Keerthi'. At the bottom of the form, there are three buttons: 'Cancel', 'Save & New', and 'Save'. The browser's address bar shows a URL from 'orgfarm-bc98734e85-dev-ed.develop.lightning.force.com'.

Fig2: Creating new Product

The **Inventory** object tracks real-time stock quantities. This ensures the business never accepts orders for out-of-stock items and helps forecast reordering needs.

So, after creation of new product now we need to update that into the inventory that can be seen in fig 3.

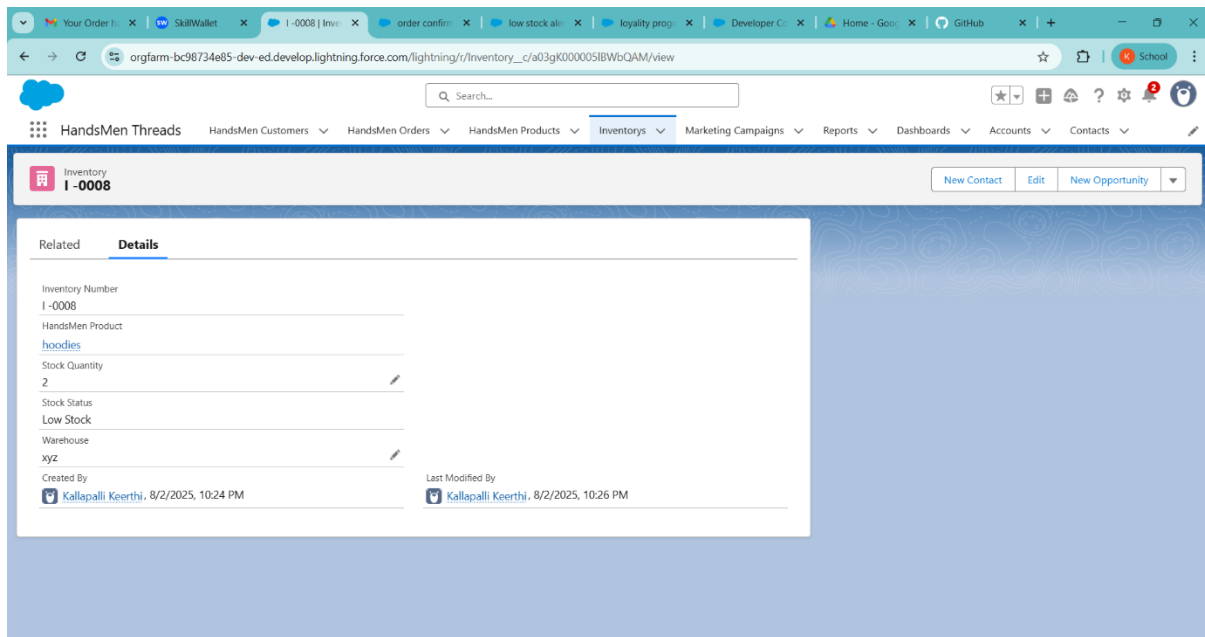


Fig3: Inventory updation of product

Placing Orders

The order placement process in **HandsMen Threads** is designed to be simple, accurate, and fully integrated with inventory and customer data. Orders are managed using the custom object **HandsMen_Orders__c**, which captures key details like product, customer, quantity, total amount, and order status.

Steps to Place a New Order:

1. **Navigate to HandsMen Customer Tab:** Go to the **HandsMen Orders** tab in the Salesforce app and click the “New” button to start placing a new order.
2. **Select Customer and Product:** Choose an existing customer from the Customer lookup field.
3. Select a product from the **Product lookup field**. Products must already exist in the **HandsMen Products** object.
4. **Enter Quantity:** Specify how many units of the product the customer wants to order. The system checks that the quantity does not exceed the available stock.
5. **Automatic Total Calculation:** An **Apex Trigger** calculates the total amount by multiplying the product's price with the quantity entered. This ensures consistent, real-time pricing without manual input.
6. **Set Initial Order Status:** The default status for new orders is “Pending.” Admins or team members can later update this to “Shipped” or “Delivered” as the order progresses.

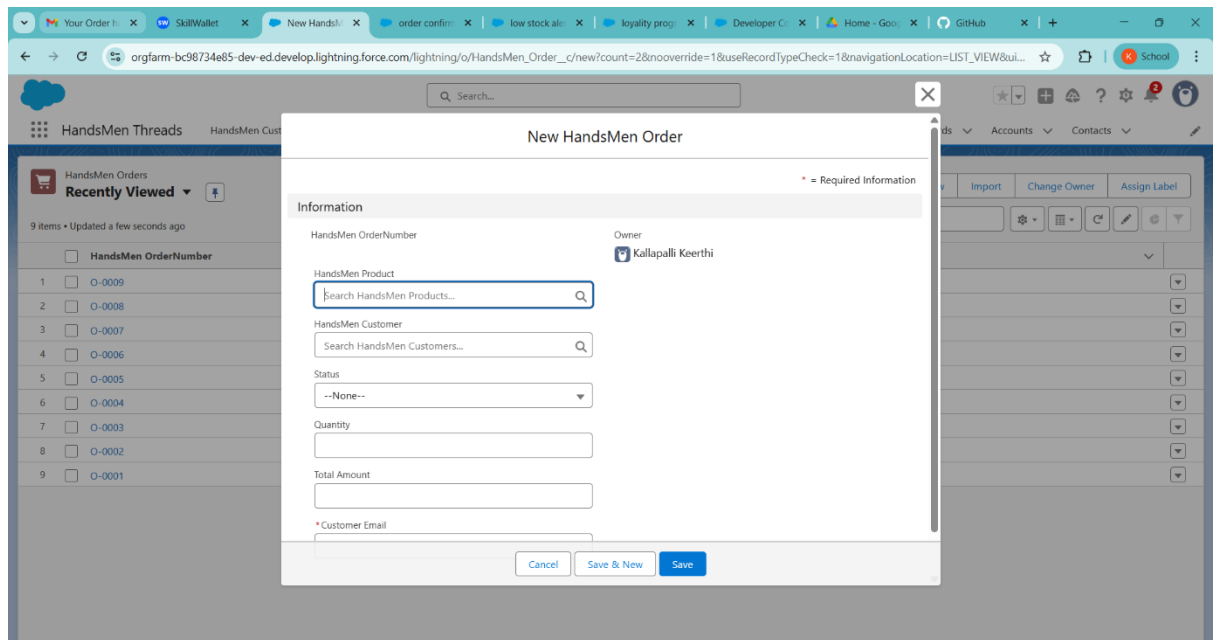


Fig4: Placing new HandsMen Order

4. Automations After Order Creation:

Once the order is created and confirmed, several automations kick in:

- **Inventory Update:** A Record-Triggered Flow automatically adjusts the stock quantity in the Inventory object by subtracting the ordered units. This prevents over-selling and ensures inventory remains accurate in real time.
- **Order Confirmation Email:** A Flow sends a confirmation email to the customer, including their name, order details, and estimated delivery information. This enhances customer trust and satisfaction.
- **Loyalty Tier Update:** The order value is added to the customer's purchase history. A Scheduled Flow evaluates the total and upgrades their Loyalty Tier (Bronze, Silver, or Gold), followed by a personalized notification email.

5. Automation with Salesforce Tools

Apex Trigger for Order Total Calculation

This Apex trigger dynamically calculates the total amount of an order based on quantity and product price:

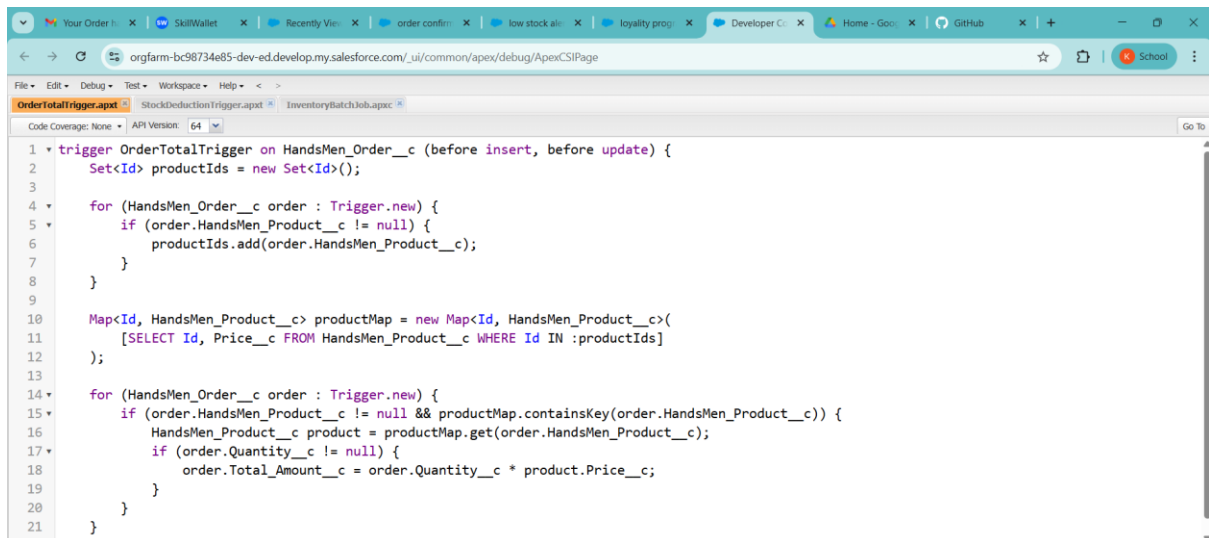


Fig5: Apex trigger to calculate Total price

Inventory Update Flow

- This Record-Triggered Flow runs after an order is confirmed.
- It fetches the product's inventory record and subtracts the ordered quantity.
- The updated stock value is saved in real-time.

Order Confirmation Email Flow

- Automatically sends a confirmation email once the order status is updated.
- The email includes personalized details such as the customer's name and product information.

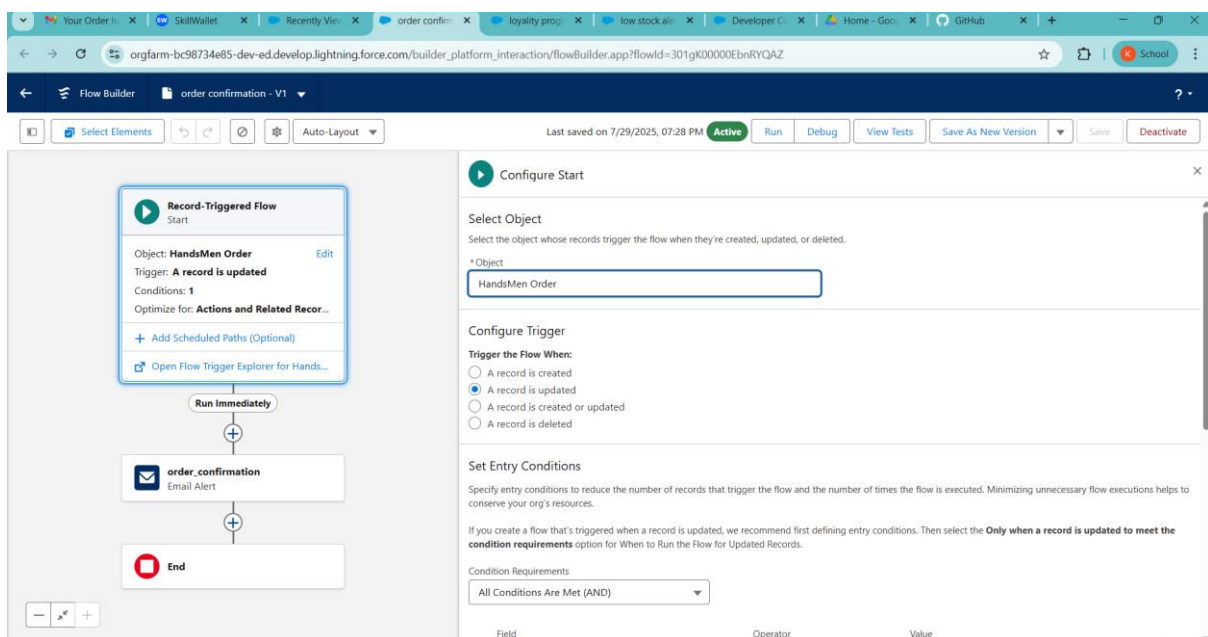


Fig6: Order Conformation Flow

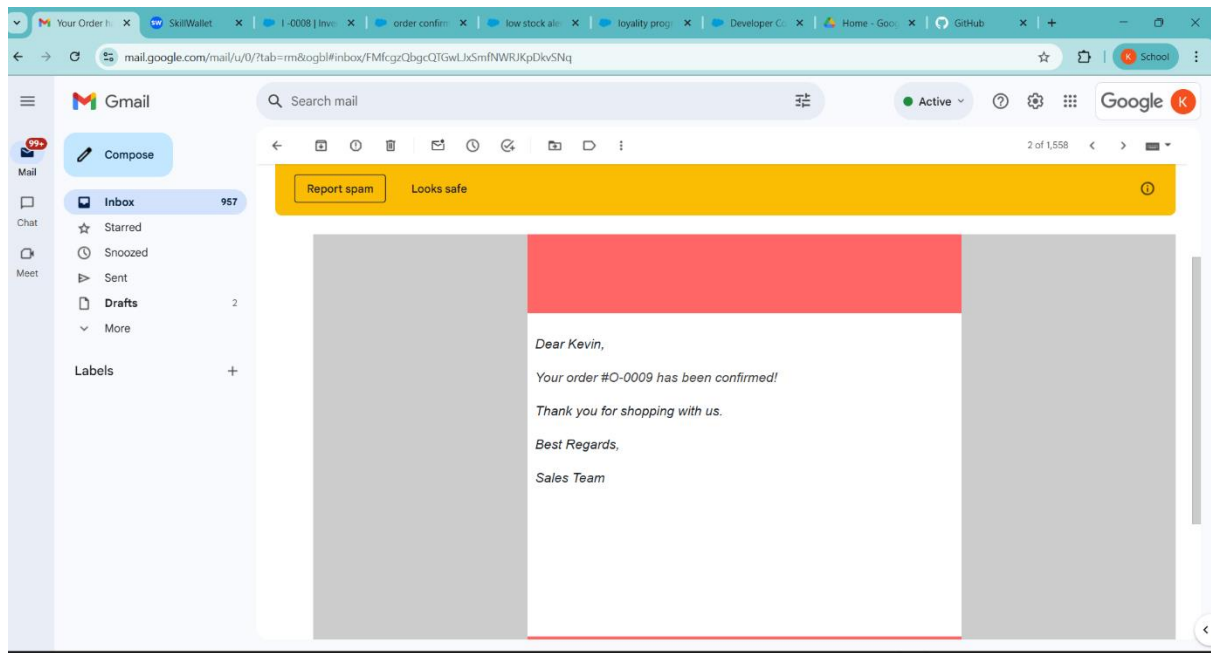


Fig7: Order conformation Email

Scheduled Low Stock Alert Flow

- Runs once a day.
- Identifies products with inventory below a set threshold (e.g., 5 units).
- Sends an alert email to the inventory manager.

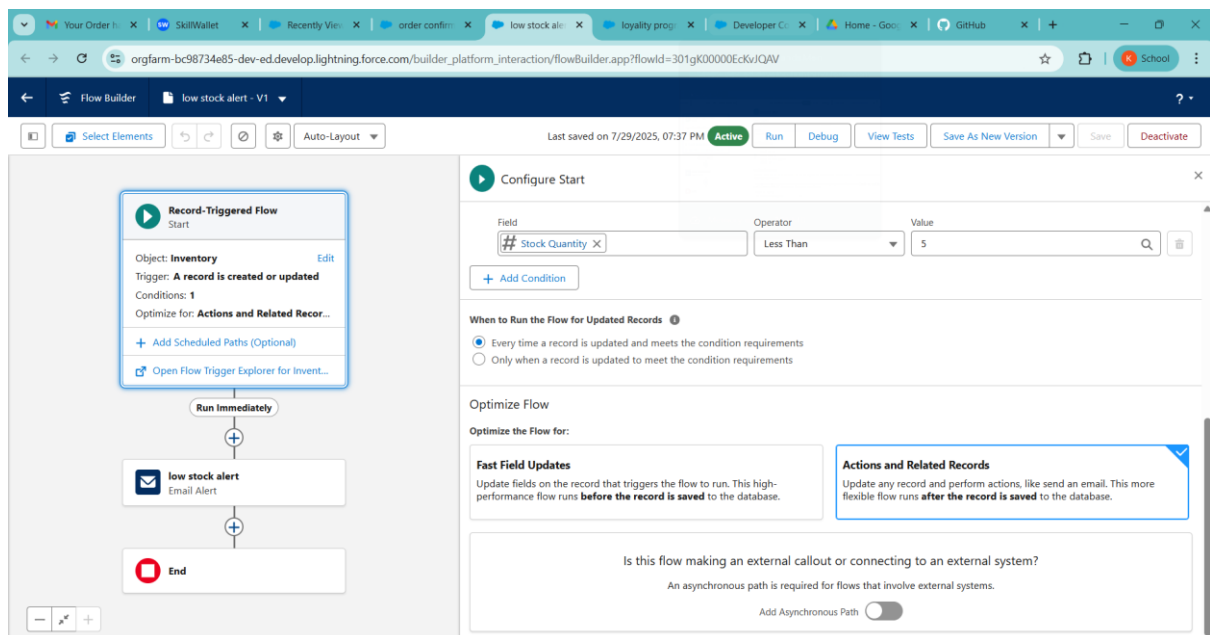


Fig8: Low Stock Scheduled flow

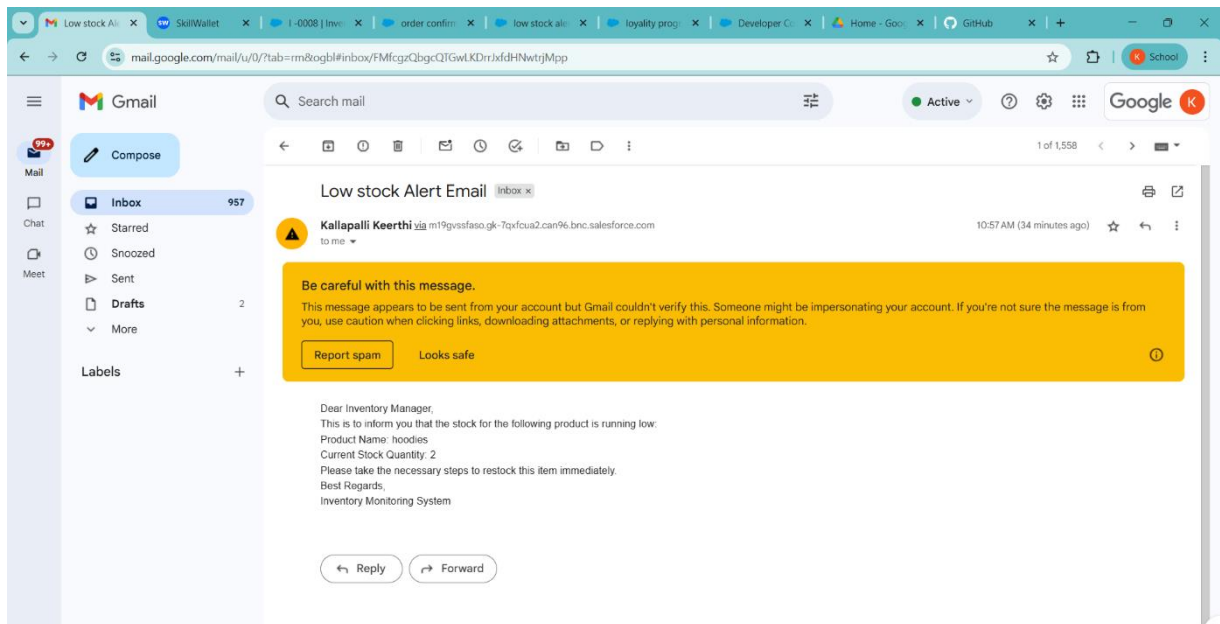


Fig 9: Low stock email

- **Loyalty Tier Update Flow**
- Scheduled flow executes nightly.
- Totals each customer's purchases and updates their loyalty tier accordingly:
 - ₹500–₹999: Silver
 - ₹1000+: Gold
 - Below ₹500: Bronze
- Customers are informed about their updated tier through email.

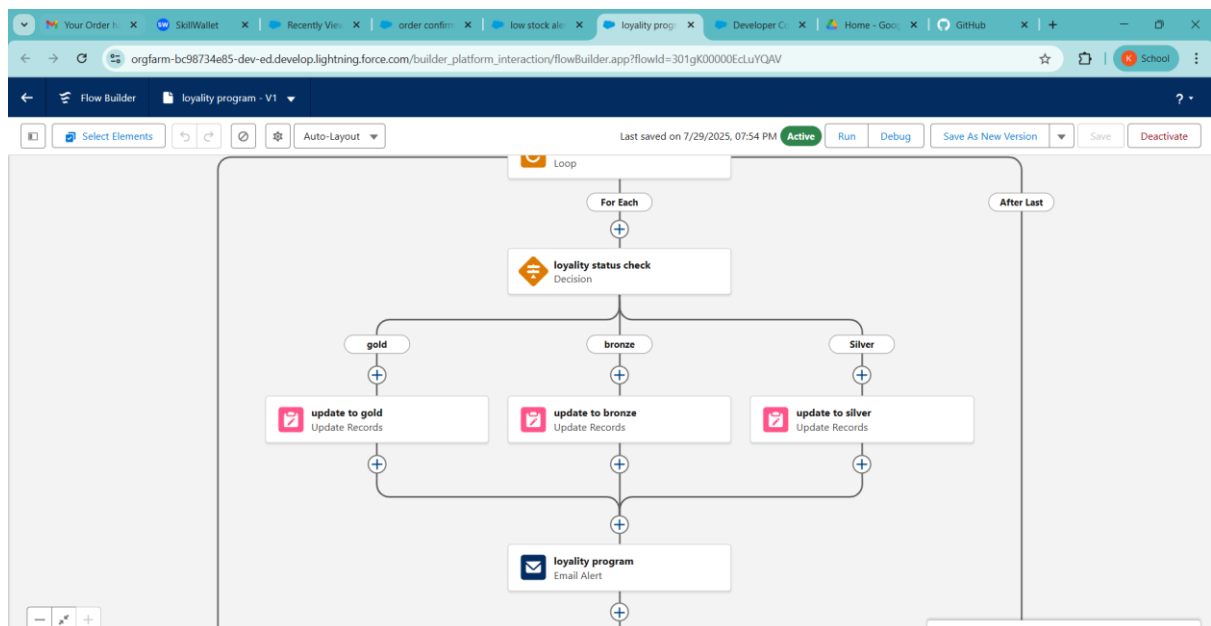


Fig 10: Loyalty Tier Update Scheduled Flow

6. Summary of Features and Benefits

Feature	Benefit
Custom Objects	Tailored data model for fashion business
Validation Rules	Data consistency and accuracy
Apex Trigger	Dynamic and automated pricing
Record-Triggered Flow	Personalized customer engagement via email
After-Update Flow	Real-time inventory tracking
Scheduled Flows	Automated alerts and loyalty program maintenance

7. Conclusion

The HandsMen Threads Salesforce CRM solution delivers a robust, scalable platform tailored for modern bespoke fashion businesses. By integrating core Salesforce capabilities like Flows and Apex with a thoughtfully designed data model, the application automates critical processes, improves data accuracy, and elevates customer satisfaction through personalized experiences.

This project showcases how Salesforce can be effectively used to power niche business models and solve real-world operational challenges through no-code and low-code tools combined with programmatic logic.