# HandsMen Threads: Enhancing Sophistication in Men's Fashion

**ABSTRACT**

This project showcases the development of a tailored Salesforce CRM solution for HandsMen Threads, a high-end men's fashion and tailoring brand. The goal of the system is to streamline daily operations, improve customer engagement, and ensure clean, consistent data across different departments.

The solution includes a well-structured data model built around five main custom objects: Customer, Order, Product, Inventory, and Marketing Campaign. Business processes were automated using Record-Triggered Flows, Scheduled Flows, Email Alerts, and Apex Triggers to manage tasks such as order confirmation, loyalty program updates, and low-stock notifications.

To maintain data accuracy, validation rules were added, and a role-based security model was established for the Sales, Inventory, and Marketing teams. In addition, a scheduled Apex batch job was developed to monitor and update items with low stock levels.

Overall, this CRM implementation enhances customer experience through personalized communication, boosts operational efficiency through automation, and creates a scalable foundation for future growth on the Salesforce platform.

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**OBJECTIVE**

The main goal of this project is to create and implement a custom Salesforce CRM system for HandsMen Threads that simplifies business operations, secures data integrity, and improves customer satisfaction.

By creating a centralized platform that manages customers, orders, products, inventory, and marketing campaigns, the project aims to:

- Automate important processes, such as order confirmation, loyalty status updates, and stock alerts.

- Ensure accurate data input through validation rules.

- Provide real-time insights into inventory and customer activity.

- Improve cross-department workflow using role-based access.

- Enhance customer interactions with targeted communication and loyalty rewards.

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**TECHNOLOGY DESCRIPTION**

**Salesforce**

Salesforce is a cloud-based CRM platform that helps organizations manage customer information, automate processes, and improve sales, marketing, and support operations. It provides both no-code tools (like Flows) and coding capabilities (like Apex) for building custom solutions.

**Custom Objects**

Custom Objects act like database tables created to store specific types of information.

Examples:

- **Customer__c** – Customer details
- **Product__c** – Product information
- **Order__c** – Customer orders

**Tabs**

Tabs allow users to access object data directly from the Salesforce interface.
Example: A Product tab displays all product records.

**Custom App**

A Salesforce App groups multiple tabs for easier navigation and focused business use.

**Profiles**

Profiles determine what a user can access or edit within Salesforce (fields, objects, pages, etc.).

**Roles**

Roles control visibility of data based on hierarchy, useful for reporting and sharing settings.

**Permission Sets**

Used to grant extra permissions to users without editing profiles.

**Validation Rules**

These rules prevent users from entering incorrect or incomplete data.
Examples:

- Emails must contain "@gmail.com"

- Stock quantity cannot be negative

**Email Templates**

Pre-made layouts for sending emails like order updates, alerts, and notifications.

**Email Alerts**

Automated emails triggered by workflows or flows.
Example: Send an email when a loyalty tier changes.

**Flows**

Flows automate processes like sending emails, updating records, and calculating values.
Example: Automatically send a confirmation email when a new order is confirmed.

**Apex**

Apex is Salesforce's programming language used for advanced logic.
Examples:

- Automatically compute total amount

- Deduct inventory after a purchase

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## PROJECT EXECUTION DETAILS

### 1. Developer Org Setup

A Salesforce Developer Org was created through the signup page and configured for development access.

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

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### 2. Custom Object Creation

Five custom objects were built to support business operations:

- **HandsMen Customer** – Customer information (email, phone, loyalty status)

- **HandsMen Product** – Product details such as SKU, stock, and price

- **HandsMen Order** – Customer orders with quantity and status

- **Inventory** – Stock levels and warehouse info

- **Marketing Campaign** – Promotional activities

Steps:

1. Go to **Setup → Object Manager → Create → Custom Object**
2. Set object label, name, reporting access, and search visibility
3. Create tabs for each custom object

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## 3. Creating the Lightning App

A custom Lightning App named **HandsMen Threads** was built.
Included Tabs: Customer, Order, Product, Inventory, Campaign, Reports, etc.
Assigned to **System Administrator**.

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## 4. Validation Rules

Several validation rules were added to ensure clean data entry.

### Order Object:

- Prevent saving if **Total_Amount__c ≤ 0**
  Error: *"Please enter a valid amount."*

### Customer Object:

- Email must include **@gmail.com**
  Error: *"Please provide a valid Gmail address."*

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## 5. User Roles & Profiles

A new profile named **Platform 1** was cloned from Standard User and assigned appropriate permissions.

Roles created:

- Sales Manager
- Inventory Manager
- Marketing Team

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## 6. User Creation

Users were added and assigned specific roles and profiles.

Example:

- **Niklaus Mikaelson** – Sales
- **Kol Mikaelson** – Inventory

These roles help maintain data security and workflow structure.

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**7. Email Templates & Alerts**
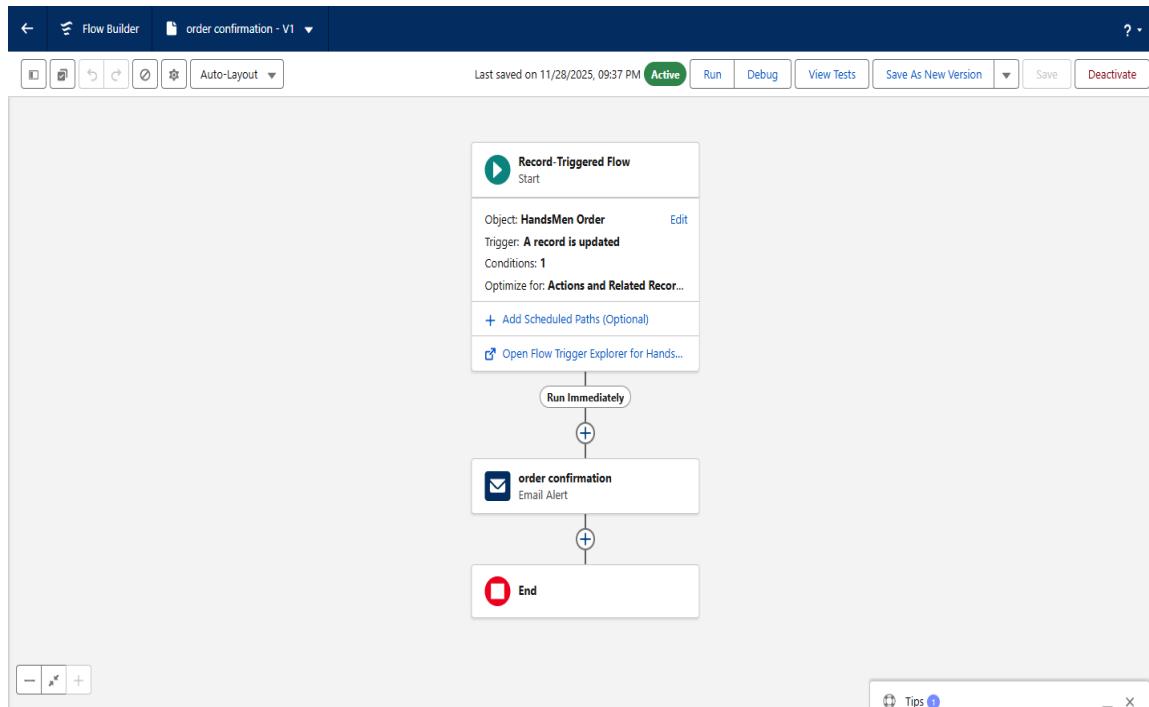
Three templates were created:

- Order Confirmation
- Low Stock Warning
- Loyalty Tier Update

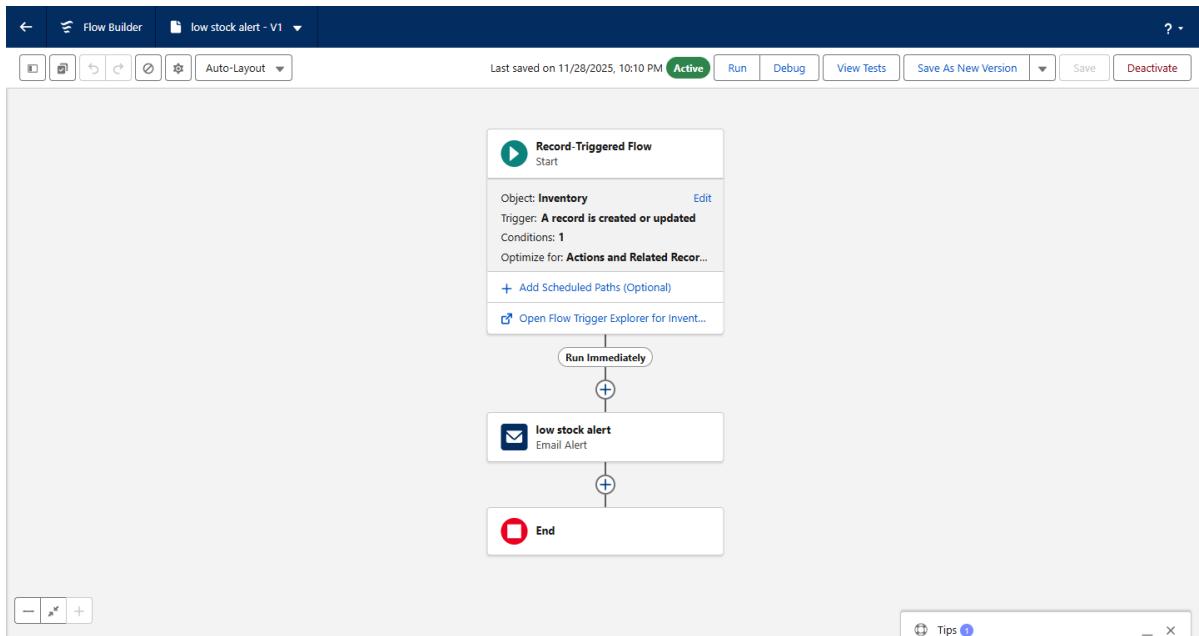Email Alerts were linked to flows for automation.

**a. Order Confirmation Flow**
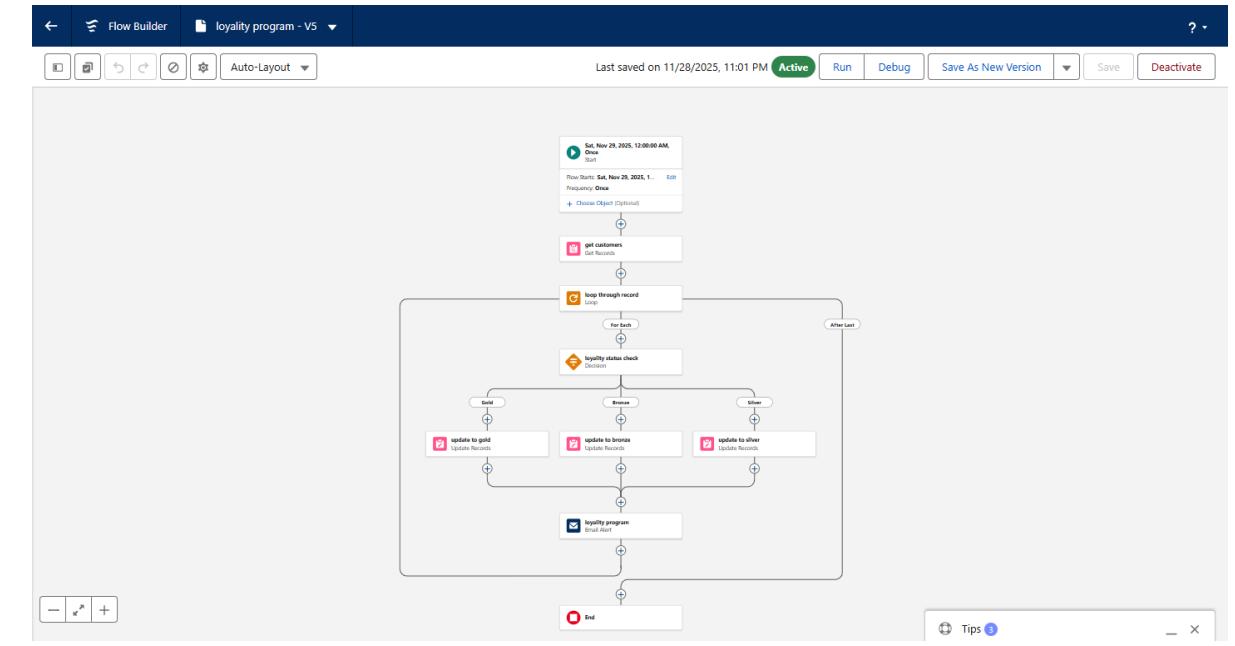
Sends an email when an order is marked as *Confirmed*.

## b. Stock Alert Flow

Triggers a low-stock warning when inventory drops below 5.



## c. Scheduled Loyalty Update Flow

Runs daily at midnight to evaluate and update loyalty tier.

## 8. Apex Triggers

Three triggers were developed:

- **Order Total Trigger:** Calculates Total_Amount__c

- **Stock Deduction Trigger:** Subtracts items from inventory

- **Loyalty Trigger:** Updates loyalty tier based on spending

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## PROJECT SCENARIO (Real-Life Example)

### 1. Customer Registration

A customer, **Kim Yamamoto**, registers in the system.
Validation ensures his email follows the correct format.

### 2. Product Setup

Admin adds items tshirts along with their price and stock.

### 3. Order Placement

Kim buys 2 shirts priced at $500 each.
Salesforce creates an order record.
Apex calculates:
**2 × 500 = $1000**

### 4. Inventory Update

Inventory reduces automatically by 2 via Apex automation.

### 5. Loyalty Program

Kim total purchases reach $1000, assigning him:

- < $500 → Bronze

- $500 - $1000 → Silver

- $1000 → Gold

He qualifies for **Silver**.

### 6. Email Notification

A flow sends Elijah an automatic email: "Thank you for your purchase! Your loyalty status is now Silver."

# SCREENSHOTS



Fig: Custom App for Handsmen Threads.
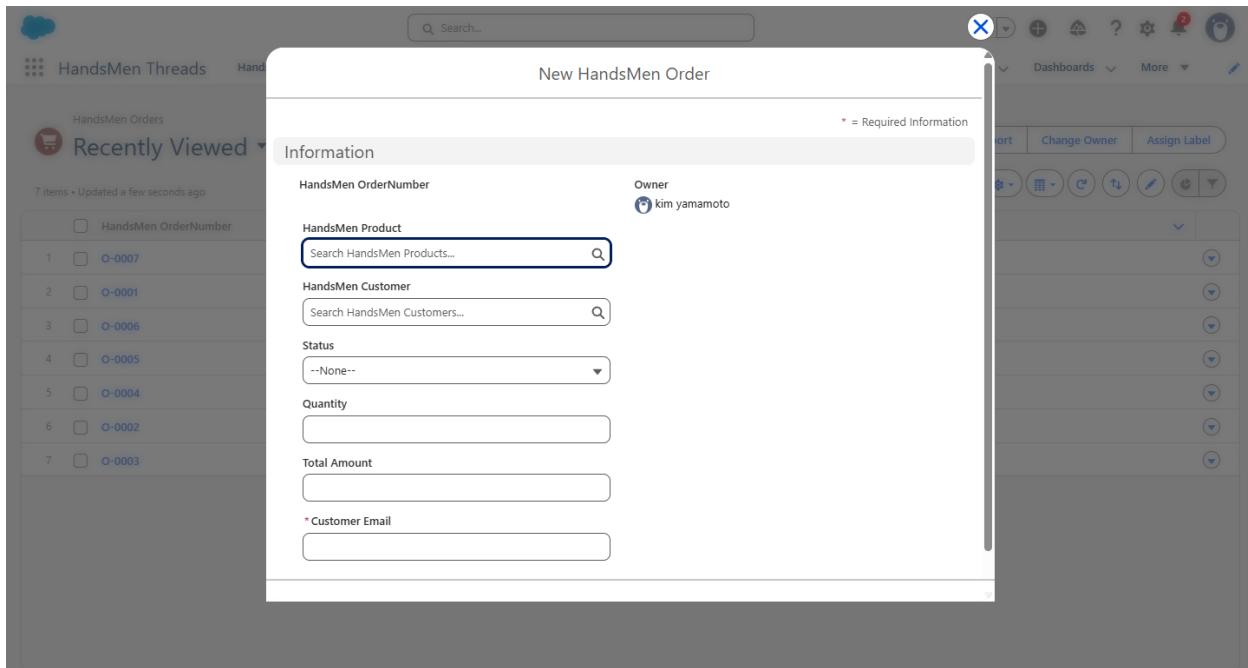
Fig: Customer Creation In Handsmen Threads



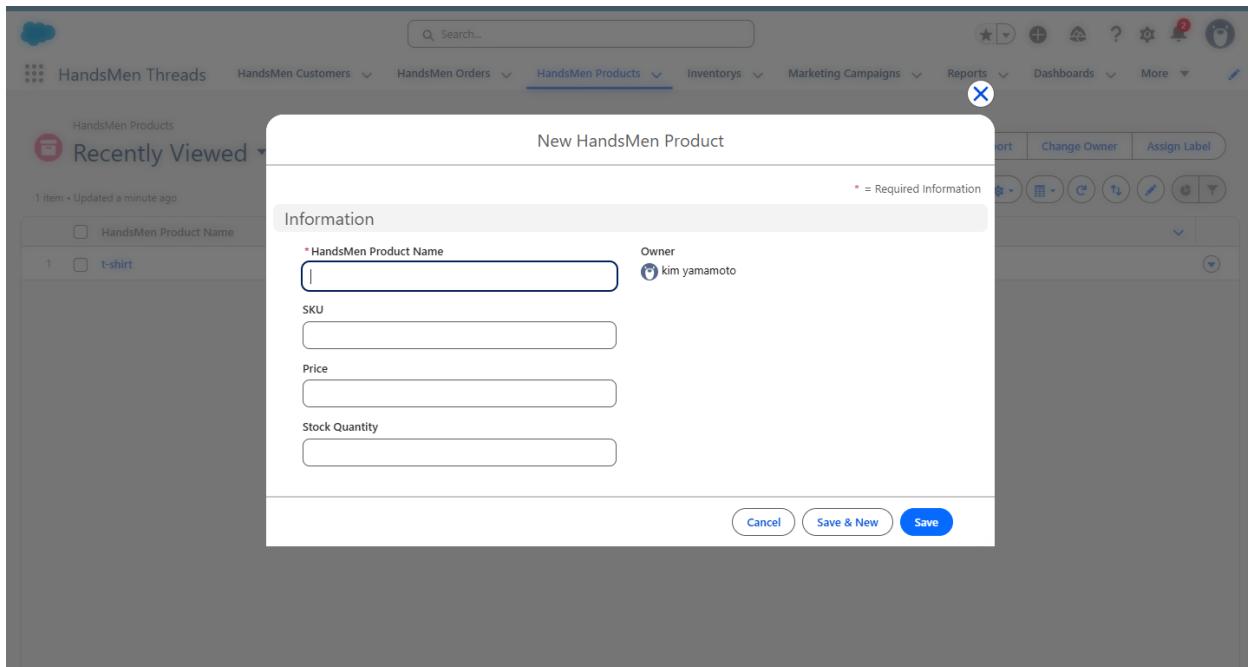Fig: Order Creation In Handsmen Threads



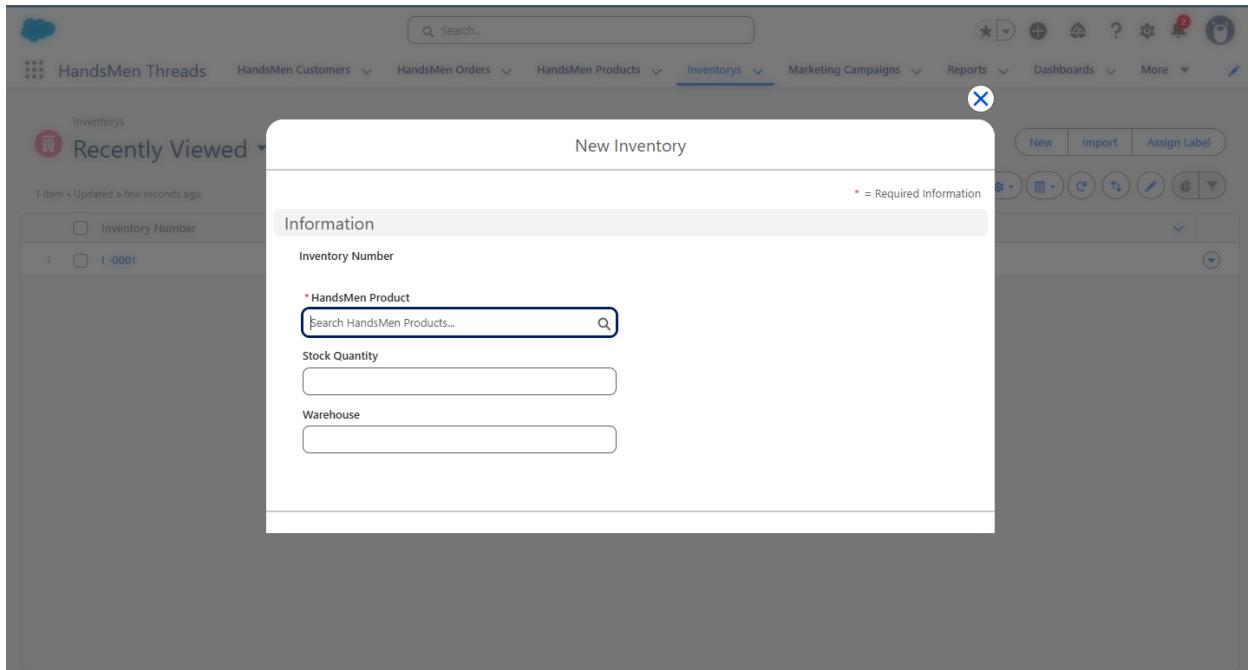Fig: Product Creation In Handsmen Threads.

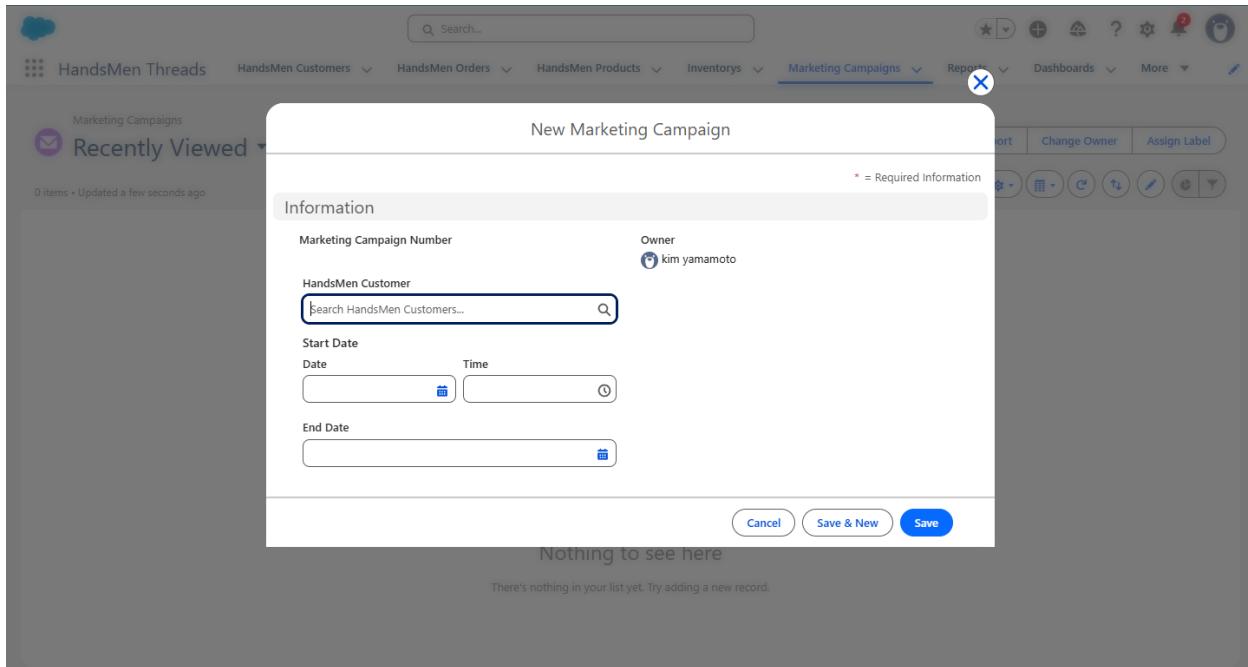Fig: Inventory Creation In Handsmen Threads.



Fig: Marketing Campaign Creation In Handsmen Threads.

# Conclusion

The Salesforce CRM implementation for HandsMen Threads successfully transformed the company's workflow into a more organized, automated, and data-driven system. By creating custom objects, automating key business processes, and establishing strong validation and security measures, the solution ensures that customer information, orders, inventory, and marketing activities are managed efficiently and accurately.

Through the use of Flows, Email Alerts, and Apex automation, tasks that were previously manual such as calculating order totals, updating loyalty tiers, and monitoring stock are now handled instantly and reliably. This not only reduces human error but also improves response time and customer satisfaction. The loyalty program, automated communications, and centralized data contribute to a more personalized customer experience, supporting long-term customer relationships.

Overall, this project demonstrates how Salesforce can be customized to fit the unique needs of a fashion and tailoring business. The system provides a solid foundation for scalability, allowing HandsMen Threads to continue expanding its operations while maintaining consistency, accuracy, and excellent service. This CRM solution is not just a tool for daily operations it is a strategic asset that supports future growth and innovation for the brand.