

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

ABSTRACT

- This project presents the implementation of a customized Salesforce CRM solution for Hands Men Threads, premium men's fashion and tailoring brand. The objective was to streamline business operations, enhance customer engagement, and maintain data integrity across departments.
- The solution involves designing a robust data model featuring five key custom objects:
 - ➔ Customer, Order, Product, Inventory, and Marketing Campaign. Business processes were automated using Record-Triggered Flows, Scheduled Flows, Email Alerts, and Apex to handle order confirmations, loyalty status updates, and proactive stock alerts.
 - ➔ To ensure clean and reliable data, validation rules were established, and a role-based security model was implemented for the Sales, Inventory, and Marketing teams. The solution also includes a scheduled batch job using Apex to update low stock quantities.
 - ➔ This end-to-end CRM implementation improves customer experience through personalized communication, ensures operational efficiency with automation, and lays a scalable foundation for future business growth using the Salesforce Platform.

OBJECTIVE

The main objective of this project is to develop and implement a customized Salesforce CRM solution for Hands Men Threads to streamline core business operations, maintain data integrity, and enhance customer satisfaction.

By building a centralized system to manage customers, orders, products, inventory, and marketing campaigns, the project aims to:

- Automate key processes such as order confirmations, loyalty status updates, and stock alerts.
- Ensure accurate and consistent data entry using validation rules.
- Enable real-time visibility of inventory and customer interactions.
- Improve internal team coordination through role-based access control.
- Deliver personalized customer experiences through targeted communication and loyalty programs.

TECHNOLOGY DESCRIPTION

Salesforce:-

Salesforce is a cloud-based Customer Relationship Management (CRM) platform that helps businesses manage customer data, automate processes, and improve service, marketing, and sales operations. It provides point-and-click tools as well as programmatic capabilities (like Apex and Flows) to build custom business solutions.

Custom Objects:-

Objects in Salesforce are like tables in a database. Custom Objects are created to store specific data.

Example:

Customer_c-Stores customer info

Product_c-Stores product details

Order_c-Stores orders

Tabs:-

Tabs are used to display object data in the Salesforce UI.

Example: A tab for Product_c allows users to easily view and manage products.

Custom App:-

An App in Salesforce is a collection of tabs grouped together for a specific business purpose.

Profiles:-

Tabs:-

Tabs are used to display object data in the Salesforce UI.

Example: A tab Product_c allows users to easily view and manage products.

Profiles define what a user can see, do, and edit in Salesforce. It controls object permissions, field access, and more.

Roles:-

Roles control the data visibility in Salesforce's role hierarchy. It's used for sharing settings and reporting.

Permission Sets:-

Permission Sets grant additional permissions to users without changing their profile.

Email Templates:-

Predefined formats for sending emails to customers or users.

Example:

"Order Confirmation" template

Email Alerts:-

Email Alerts are actions in Flows or Workflow Rules that send emails using predefined templates.

Example: When a loyalty level changes, an email is sent to the customer.

Flows:-

Flows automate business logic without code. They can create, update, or send notifications.

PROJECT EXPLANATION WITH REAL-WORLD EXAMPLE

Let's walk through it like a real customer interaction.

1. Customer Registration

A customer, Elijah Mikaelson, visits the store or website.

In Salesforce: A record is created in the Customer object with his name, phone, email,

Etc. Validation Rule: Ensures the email is valid (e.g., must contain@gmail.com).

2. Product Setup

The admin adds products like Shirts, Jeans, etc., into the Product__c object.

Each product has a price and other details.

Inventory is also created to manage stock for these products.

3. Order Placement

Elijah decides to buy 2 shirts (each 2980). An order is placed.

In Salesforce: A new Order record is created.

Apex Trigger: Automatically calculates Total Amount__c=2×500-1000.

4. Inventory Update

As soon as the order is placed:

Apex Trigger on Inventory: Reduces shirt stock by 2. Validation Rule: Ensures stock never goes below 0.

5. Loyalty Program

Elijah now has a total purchase of ₹1000.

A trigger on Customer checks his total purchases.

Based on the value:

<2500 Bronze

*500-1000→Silver

*1000 →Gold

So, Elijah becomes a Silver member

6. Email Notifications

When a new order is placed or loyalty status is updated:

Flow + Email Alert is triggered.

Elijah gets an email:

"Thanks for your purchase! Your loyalty status is now Silver."

7. Users and Roles

Salesforce users like store staff are created:

Niklaus Mikaelson - Sales Role (Platform | Profile)

"Thanks for your purchase! Your loyalty status is now Silver."

Screen Shots:-

HandsMen Threads

HandsMen Customers

HandsMen Orders

HandsMen Products

Inventorys

Marketing Campaigns

Reports

Dashboards

Accounts

Contacts

Q Search...

HandsMen Order

O-0001

New Contact

Edit

New Opportunity

Related

Details

HandsMen OrderNumber

O-0001

Owner

Kratika Daswani

HandsMen Product

jeans

HandsMen Customer

Status

Confirmed

Quantity

4

Total Amount

4,000

customer email

kratikadaswani23@gmail.com

Created By

Kratika Daswani

7/31/2025, 2:51 AM

Last Modified By

Kratika Daswani

7/31/2025, 5:14 AM

HandsMen Threads

HandsMen Customers

HandsMen Orders

HandsMen Products

Inventorys

Marketing Campaigns

Reports

Dashboards

Accounts

Contacts

Q Search...

HandsMen Customers

Recently Viewed

New

Import

Change Owner

Assign Label

1 item • Updated a few seconds ago

Q Search this list...

HandsMen Customer Name

1

kratika

[HandsMen Threads](#)[HandsMen Customers](#) ▾[HandsMen Orders](#) ▾[HandsMen Products](#) ▾[Inventories](#) ▾[Marketing Ca](#)[HandsMen Products](#)**Recently Viewed** ▾

3 items • Updated a few seconds ago

**HandsMen Product Name**

1

[jeans](#)

2

[Tshirt](#)

3

[tshirt](#)[HandsMen Threads](#)[HandsMen Customers](#) ▾[HandsMen Orders](#) ▾[HandsMen Products](#) ▾[Inventories](#) ▾[Marketing Campaigns](#) ▾[Reports](#) ▾[Inventory](#)**I -0001**[Related](#)**[Details](#)**

Inventory Name

I -0001

HandsMen Product

[jeans](#)

StockQuantity

3



Stock Status

Low Stock

Warehouse

abc



Created By

[Kratika Daswani](#), 7/31/2025, 3:51 AM

Last Modified By

[Kratika Daswani](#), 7/31/2025, 5:06 AM



Kratika Daswani via r9dzom72zikasc.gl-7srujuai.can98.bnc.salesforce.com
to me ▼

Why is this message in spam? This message is similar to messages that were identified as spam in the past.

Report as not spam

Dear Inventory Manager,
This is to inform you that the stock for the following product is running low:
Product Name: jeans
Current Stock Quantity: 4
Please take the necessary steps to restock this item immediately.
Best Regards,
Inventory Monitoring System

↩ Reply

➡ Forward



 AI Reply

low stock email Spam x



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Inventory Monitoring System

↩ Reply

➡ Forward



 AI Reply

Your Order has been Confirmed! Spam x



Kratika Daswani via ud4gwyer8npx.gl-7srujuai.can98.bnc.salesforce.com
to me ▾

17:35 (36 minutes ago) ☆ ☹ ↶ ⋮

Why is this message in spam? This message is similar to messages that were identified as spam in the past.

Report as not spam



Dear ,

Your order # has been confirmed!

Thank you for shopping with us.

Best Regards.



Record-Triggered Flow
Start

Object: **Inventory** [Edit](#)

Trigger: **A record is created or updated**

Conditions: **1**

Optimize for: **Actions and Related Recor...**

[+ Add Scheduled Paths \(Optional\)](#)

[Open Flow Trigger Explorer for Invent...](#)

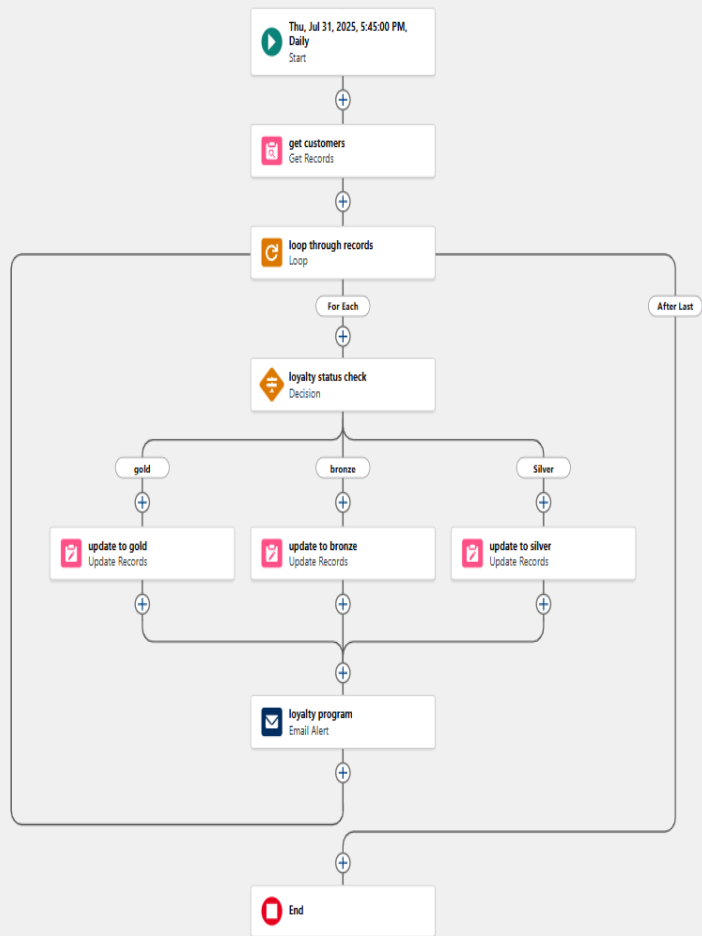
Run Immediately



low stock email alert
Email Alert



End



CONCLUSION

The Hands Men Threads CRM system built on Salesforce successfully streamlines key business processes like customer management, product cataloging, order processing inventory tracking, and loyalty program automation. By leveraging Salesforce tools like Custom Objects, Flows, Validation Rules, Email Alerts, and Apex, the system ensures accurate data entry, real-time updates, and enhanced customer experience. Through automation and well-structured user roles, the platform minimizes manual errors, speeds up operations, and provides better insights into sales and stock.

Future Scope:-

1. Customer Portal Integration

Build a Customer Community Portal where customers can log in, view orders, and track loyalty status.

2. Mobile App using Salesforce Mobile SDK

Enable store staff to manage inventory and orders on the go using a mobile interface.

3. Reports & Dashboards

Create detailed sales and inventory dashboards for management to monitor trends and performance in real-time.

4. AI-Powered Recommendations (Einstein)