

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

ABSTRACT

This project developed a Salesforce CRM solution for HandsMen Threads to streamline business processes and enhance customer interaction. It incorporates five custom objects along with automation features such as Flows, Email Alerts, and Apex to efficiently handle orders, loyalty updates, and inventory management.

To maintain accurate and secure data, validation rules and role-based access controls were implemented for the Sales, Inventory, and Marketing teams. A scheduled Apex batch job also monitors low inventory levels. Overall, this CRM solution enhances customer experience, increases efficiency through automation, and establishes a scalable framework to support the company's future growth.

OBJECTIVE

This project aims to design a customized Salesforce CRM solution for HandsMen Threads that streamlines business operations, ensures accurate and reliable data, and enhances customer satisfaction. The system integrates customer, order, inventory, and marketing data into a centralized platform while automating key processes through Flows, Email Alerts, and Apex to reduce manual work and increase efficiency. It strengthens customer engagement with personalized communication such as automated order confirmations, loyalty notifications, and targeted marketing campaigns, while maintaining data integrity through validation rules, record security, and role-based access for Sales, Inventory, and Marketing teams. Additionally, the CRM provides a scalable foundation to support future growth and optimizes inventory management with automated low-stock alerts and scheduled batch updates to maintain balanced stock levels.

SYSTEM OVERVIEW

This project utilizes Salesforce, a cloud-based CRM platform, to deliver a comprehensive business solution for HandsMen Threads. Salesforce enables the creation of custom objects, workflow automation, and secure data storage without the need for dedicated infrastructure. Key features employed include

Record-Triggered Flows, Scheduled Flows, Email Alerts, Validation Rules, Reports, Dashboards, and Apex. Apex, Salesforce's proprietary programming language, supports advanced operations such as bulk inventory updates and record processing.

The platform's role-based security ensures that sensitive information is accessible only to authorized users, while its cloud architecture provides secure access from any device at any time. Together, these technologies streamline operations, maintain accurate data tracking, and enhance customer experiences through personalized interactions.

DETAILED EXECUTION OF THE PROJECT PHASES

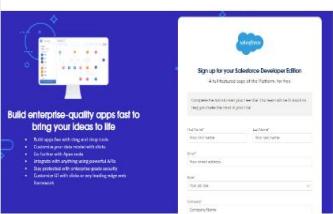
1. Developer org setup:

Creating Developer Account

Creating a developer org in salesforce.

1. Go to <https://developer.salesforce.com/signup>

2. On the sign up form, enter the following details :

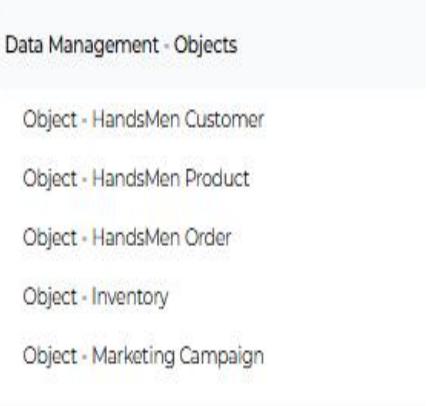


1. First name & Last name
2. Email
3. Role : Developer
4. Company : College Name
5. County : India
6. Postal Code : pin code
7. Username : should be a combination of your name and company

This need not be an actual email id, you can give anything in the format : username@organization.com

Click on sign me up after filling these.

2. Object creation:



Data Management - Objects

Object - HandsMen Customer

Object - HandsMen Product

Object - HandsMen Order

Object - Inventory

Object - Marketing Campaign

3. Data Management field and lookup relationship

Data Management - Fields

Field - Email

Field - Phone

Field - Loyalty Status

Create Lookup Relationship

Formula Fields

Create Remaining fields for the objects

4. Creating Validation rules

Data Configuration

Validation Rules

Create Remaining Validation Rules

5.Creating data configuration, Data Security- Profiles, Data Security- Roles,

DataSecurity

Users and Data Security- Permission set

Data Configuration

Validation Rules

Create Remaining Validation Rules

Data security - Profiles

Profile - Sales

Data Security - Roles

Role - Sales

Create Roles

Data Security - Users

User - Niklaus

User - Kol

Create Users

Data Security - Permission Set

Permission set - Permission_Platform_1

6.Creating Email Template

Email Template

Create an Order Confirmation Email Template

Create Remaining Email Templates

Create an Email Alert

7.Creating Flows

Flows

Create Order Confirmation Email

Create Stock Alert Email (Record-Triggered)

Create a Scheduled Flow

8.Creating Automation using Apex

Automation using Apex

Create Apex Class

CREATED COMPONENTS

HandsMen Customer

The screenshot shows a list of customers under the 'HandsMen Customer' tab. The list includes columns for selection, name, and a small icon. The names listed are carl, Dan, john, and leo. At the top right, there are buttons for 'New', 'Import', 'Change Owner', and 'Assign Label'. Below the list is a search bar and a set of filter icons.

The screenshot shows the 'New HandsMen Customer' dialog box. It contains fields for 'HandsMen Customer Name' (with a placeholder 'carl'), 'Email', 'Phone', 'Loyalty Status' (set to '--None--'), 'FirstName', 'LastName', and 'Total Purchases'. The 'Owner' field is populated with 'Leo Angelo Centeno'. At the bottom are 'Cancel', 'Save & New', and 'Save' buttons.

HandsMen Order

The screenshot shows a list of orders under the 'HandsMen Orders' tab. The list includes columns for selection, name, and a small icon. The names listed are O-0006, O-0005, O-0004, O-0003, O-0002, and O-0001. At the top right, there are buttons for 'New', 'Import', 'Change Owner', and 'Assign Label'. Below the list is a search bar and a set of filter icons.

The screenshot shows the 'New HandsMen Order' dialog box. It contains fields for 'HandsMen Order Name' (placeholder 'O-0007'), 'HandsMen Product' (search bar), 'HandsMen Customer' (search bar), 'Status' (set to '--None--'), 'Quantity', 'Total Amount', and 'Customer Email'. The 'Owner' field is populated with 'Leo Angelo Centeno'. At the bottom are 'Cancel', 'Save & New', and 'Save' buttons.

HandsMen Product

A screenshot of a software application interface titled "HandsMen Products". The top navigation bar includes "New", "Import", "Change Owner", and "Assign Label". A search bar says "Search this list...". Below the header is a table with three rows:

	HandsMen Product Name	Actions
1	Short	
2	T-shirt	
3	T-shirt	

A screenshot of a software application interface titled "New HandsMen Product". The title bar has a close button (X). The main area is labeled "Information" and contains the following fields:

- * HandsMen Product Name: An input field with a red border and a required information indicator (*).
- Owner: A dropdown menu showing "Leo Angelo Centeno".
- SKU: An empty input field.
- Price: An empty input field.
- Stock Quantity: An empty input field.

At the bottom are three buttons: "Cancel", "Save & New", and "Save".

Inventory

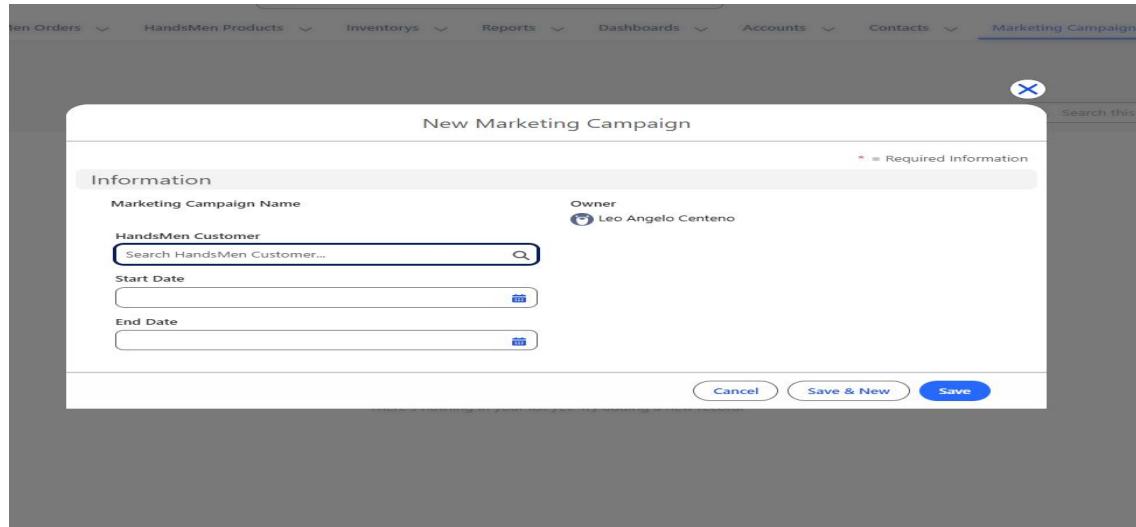
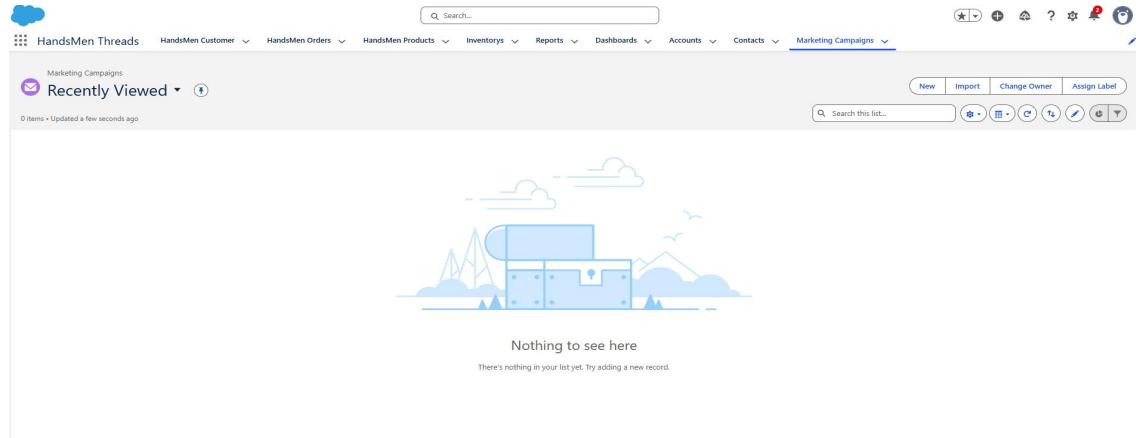
A screenshot of a software application interface titled "Inventorys". The top navigation bar includes "New", "Import", and "Assign Label". A search bar says "Search this list...". Below the header is a table with one row:

	Inventory Name	Actions
1	1-0001	

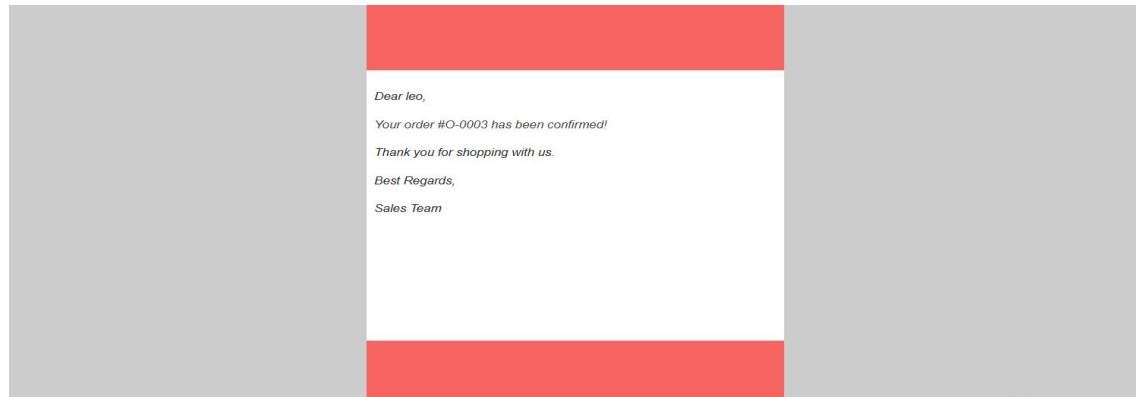
A screenshot of a software application interface titled "New Inventory". The title bar has a close button (X). The main area is labeled "Information" and contains the following fields:

- * HandsMen Product: A search input field with placeholder text "Search HandsMen Products..." and a magnifying glass icon.
- Stock Quantity: An empty input field.
- Warehouse: An empty input field.

At the bottom are three buttons: "Cancel", "Save & New", and "Save".



Order Confirmation



Stock Alert

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

[Reply](#) [Forward](#) [Smile](#)

Conclusion

The Salesforce CRM solution implemented for HandsMen Threads effectively modernizes and streamlines business operations by unifying sales, inventory, and marketing within a single, efficient platform. Through the integration of custom objects, automated workflows, and secure data management, the system enables accurate tracking of client interactions, orders, inventory, and marketing activities. Automation features such as order notifications, low-stock alerts, and scheduled updates reduce manual effort, allowing the team to concentrate on customer support and business growth. With Salesforce's scalability and robust security, the solution is well-positioned to accommodate future expansion while maintaining reliability. Overall, this project demonstrates how CRM technology can drive operational efficiency, enhance customer satisfaction, and support long-term success for HandsMen Threads.