

# **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.

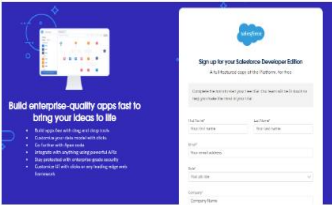
## DETAILED EXECUTION OF THE PROJECT PHASES

### 1. Developer org setup:

#### Creating Developer Account

Creating a developer org in salesforce.

- Go to <https://developer.salesforce.com/signup>
- On the sign up form, enter the following details :



1. First name & Last name
2. Email
3. Role : Developer
4. Company : College Name
5. Country : 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, Data Security- 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

HandsMen Customer

Recently Viewed

4 items • Updated a few seconds ago

New

Import

Change Owner

Assign Label

Q Search this list...

	HandsMen Customer Name	
1	<input type="checkbox"/> carl	
2	<input type="checkbox"/> dan	
3	<input type="checkbox"/> john	
4	<input type="checkbox"/> leo	

HandsMen Customer

HandsMen Orders

HandsMen Products

Inventories

Reports

Dashboards

Accounts

Contacts

New HandsMen Customer

Information

\* = Required Information

\* HandsMen Customer Name

Owner

Leo Angelo Centeno

Email

Phone

Loyalty Status

--None--

FirstName

LastName

Total Purchases

Cancel

Save & New

Save

## HandsMen Order

HandsMen Orders

Recently Viewed

6 items • Updated a few seconds ago

New

Import

Change Owner

Assign Label

Q Search this list...

	HandsMen Order Name	
1	<input type="checkbox"/> O-0006	
2	<input type="checkbox"/> O-0005	
3	<input type="checkbox"/> O-0004	
4	<input type="checkbox"/> O-0003	
5	<input type="checkbox"/> O-0002	
6	<input type="checkbox"/> O-0001	

HandsMen Orders

HandsMen Products

Inventories

Reports

Dashboards

Accounts

Contacts

New HandsMen Order

Information

\* = Required Information

HandsMen Order Name

Owner

Leo Angelo Centeno

HandsMen Product

HandsMen Customer

Status

--None--

Quantity

Total Amount

customer Email

Cancel

Save & New

Save

# HandsMen Product

HandsMen Products

Recently Viewed

New

Import

Change Owner

Assign Label

3 Items • Updated a few seconds ago

Q Search this list...

<input type="checkbox"/>	HandsMen Product Name	<div></div>
1	<input type="checkbox"/> Short	<div></div>
2	<input type="checkbox"/> T-shirt	<div></div>
3	<input type="checkbox"/> T-shirt	<div></div>

HandsMen Customer

HandsMen Orders

HandsMen Products

Inventories

Reports

Dashboards

Accounts

Contacts

Recently Viewed

New

Import

Change Owner

Assign Label

3 Items • Updated a few seconds ago

Q Search this list...

<input type="checkbox"/>	HandsMen Product Name	<div></div>
1	<input type="checkbox"/> Short	<div></div>
2	<input type="checkbox"/> T-shirt	<div></div>
3	<input type="checkbox"/> T-shirt	<div></div>

New HandsMen Product

\* = Required Information

Information

\* HandsMen Product Name

Complete this field.

Owner

Leo Angelo Centeno

SKU

Price

Stock Quantity

Cancel

Save & New

Save

# Inventory

Inventories

Recently Viewed

New

Import

Assign Label

1 Item • Updated a few seconds ago

Q Search this list...

<input type="checkbox"/>	Inventory Name	<div></div>
1	<input type="checkbox"/> I-0001	<div></div>

HandsMen Customer

HandsMen Orders

HandsMen Products

Inventories

Reports

Dashboards

Accounts

Contacts

Recently Viewed

New

Import

Assign Label

1 Item • Updated a few seconds ago

Q Search this list...

<input type="checkbox"/>	Inventory Name	<div></div>
1	<input type="checkbox"/> I-0001	<div></div>

New Inventory

\* = Required Information

Information

Inventory Name

\* HandsMen Product

Search HandsMen Products...

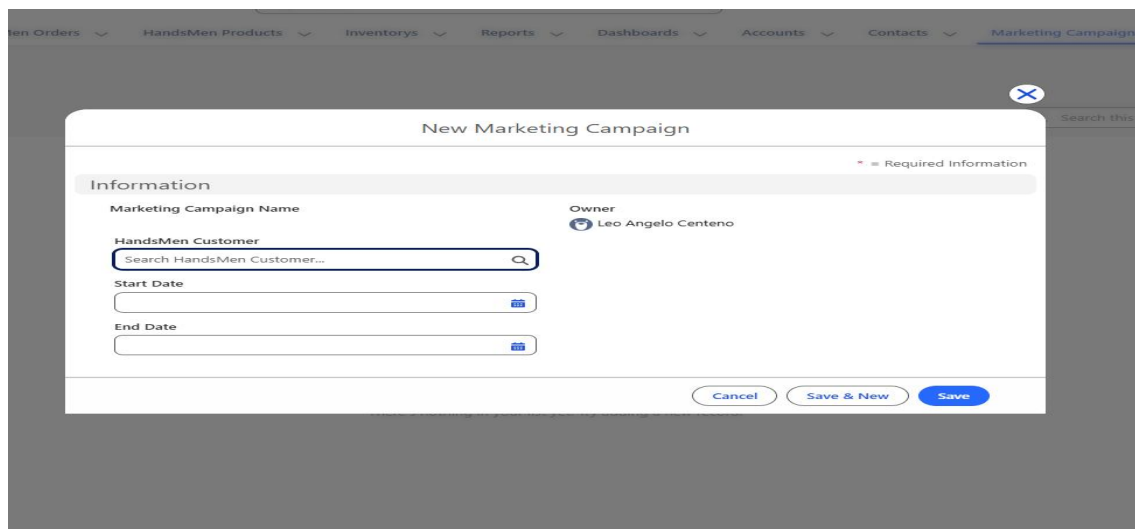
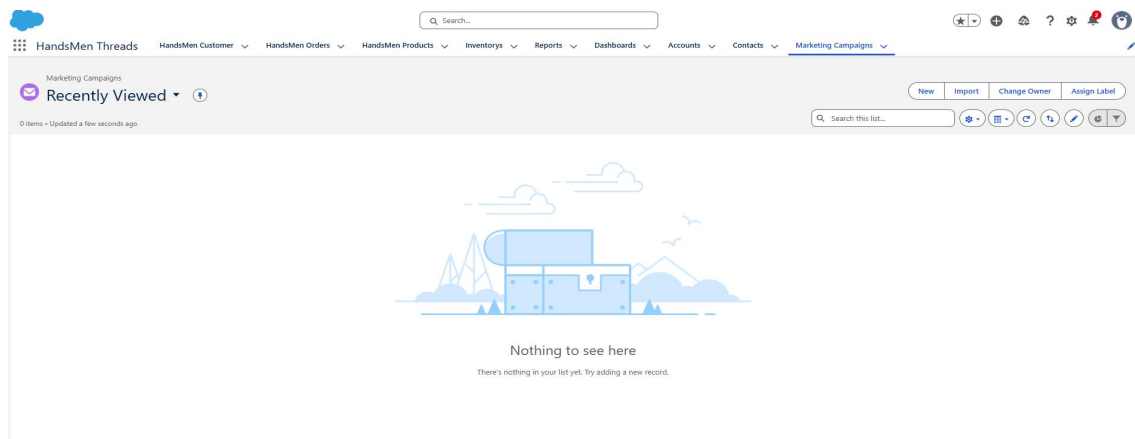
Stock Quantity

Warehouse

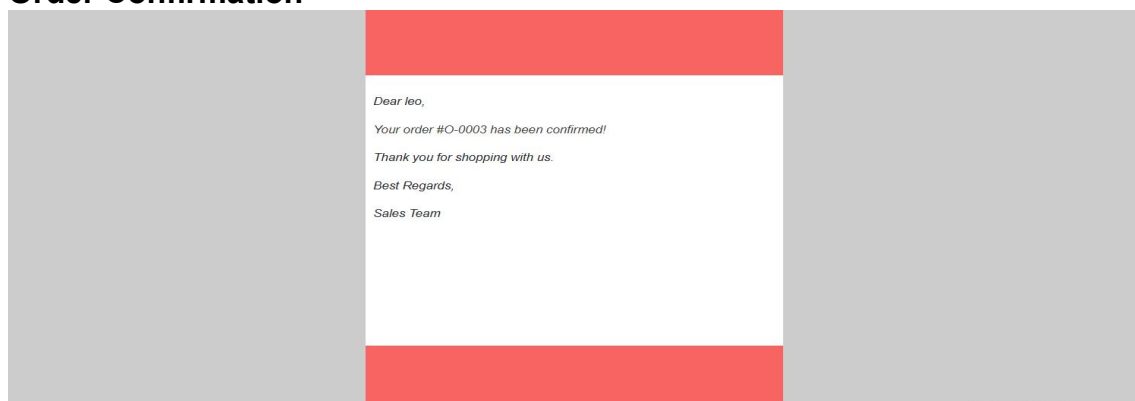
Cancel

Save & New

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



## **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.