

HandsMen Threads: Elevating the Art of

Sophistication in Men's Fashion

ABSTRACT

This project presents the implementation of a customized Salesforce CRM solution for **HandsMen Threads**, a 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 HandsMen Threads to streamline core business operations, maintain data integrity, and enhance customer satisfaction.

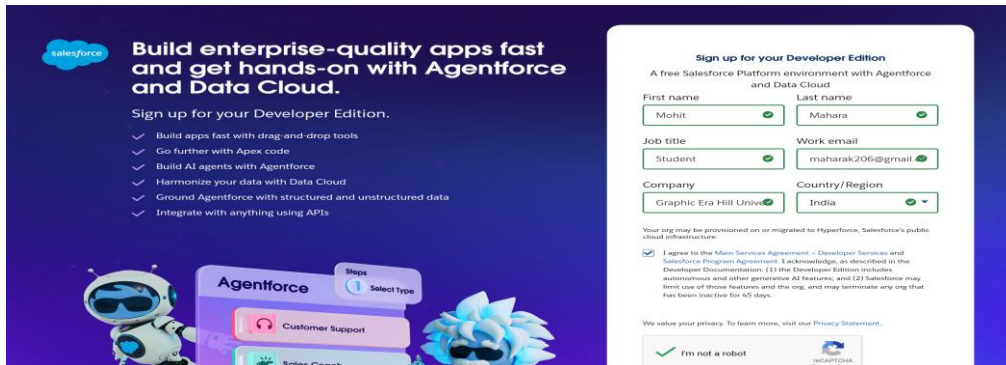
By building a centralized system to manage customers, orders, products, inventory, and marketing campaigns, the project aims to:

- **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.

DETAILED EXECUTION OF PROJECTS PHASES

1. Developer Org Setup

- A Salesforce Developer Org was created using <https://developer.salesforce.com/signup>.
- The account was verified, password set, and access was granted to the Salesforce Setup page.



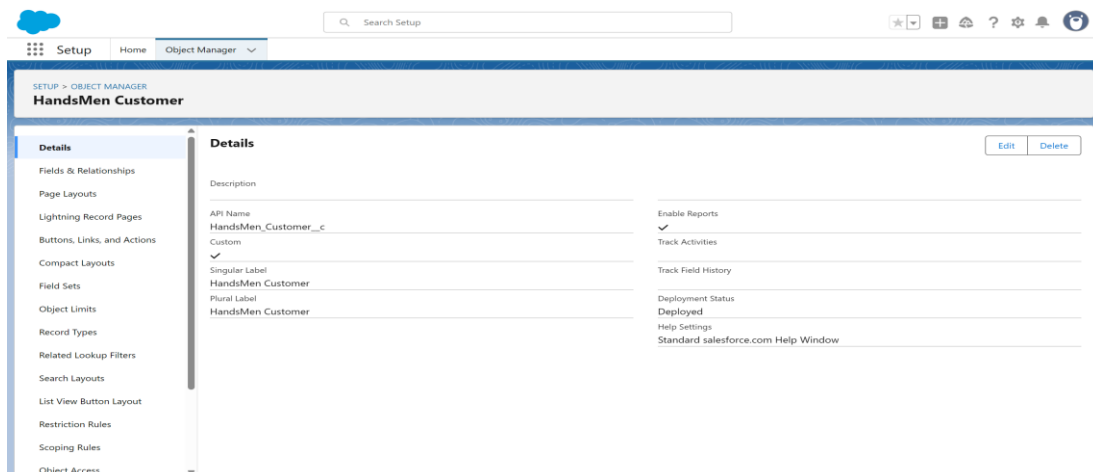
2. Custom Object Creation

Five custom objects were created to store business-critical data:

- **HandsMen Customer** - Stores customer info like email, phone, loyalty status.
- **HandsMen Product** - Stores product catalog details like SKU, price, and stock.
- **HandsMen Order** - Stores orders placed by customers, including quantity and status.
- **Inventory** - Tracks stock quantity and warehouse location.
- **Marketing Campaign** - Stores promotional campaigns and scheduling.

Steps followed:

- Navigated to Setup -> Object Manager -> Create Custom Object
- Provided label, name, and enabled reports/search
- Saved and created Tabs for each object.



3. Creating the Lightning App

- A custom Lightning App named HandsMen Threads was created.
- Included tabs: HandsMen Customer, Order, Product, Inventory, Campaign, Reports, etc.
- Assigned to the System Administrator profile.

4. Validation Rules

To ensure accurate data entry and enforce business logic, the following validation rules were applied:

- **Order Object:** Prevents saving if Total_Amount__c <= 0.
Error: "Please Enter Correct Amount"
- **Customer Object:** Validates email contains @gmail.com.
Error: "Please fill Correct Gmail"

The screenshot shows the 'New HandsMen Customer' form. The form has a title bar 'New HandsMen Customer' and a legend '* = Required Information'. The form is divided into sections: 'Information' and 'Owner'. The 'Information' section contains fields for 'HandsMen Customer Name' (with value 'Mohit'), 'Email' (with value 'hello' and a red error message 'Enter a valid email address, such as name@email.com.'), 'Phone', 'Loyalty Status' (with value '--None--'), 'FirstName', 'LastName', and 'Total Purchases'. The 'Owner' section shows a profile picture and name 'Mohit Mahara'. A red error message box is displayed over the 'Email' field, stating 'We hit a snag. Review the following fields: Email'. At the bottom of the form, there are buttons for 'Cancel', 'Save & New', and 'Save'.

5. User Role & Profile Setup

- Cloned the Standard User profile to a new profile named Platform 1 and added access to necessary custom objects.
- Created roles for different departments:
 - Sales Manager, Inventory Manager, Marketing Team

6. User Creation

Users were created in Salesforce and assigned appropriate roles and profiles to reflect their responsibilities:

- Niklaus Mikaelson - Assigned the Sales role
- Kol Mikaelson - Assigned the Inventory role
- These role-based assignments help enforce proper data access and process control within the system.

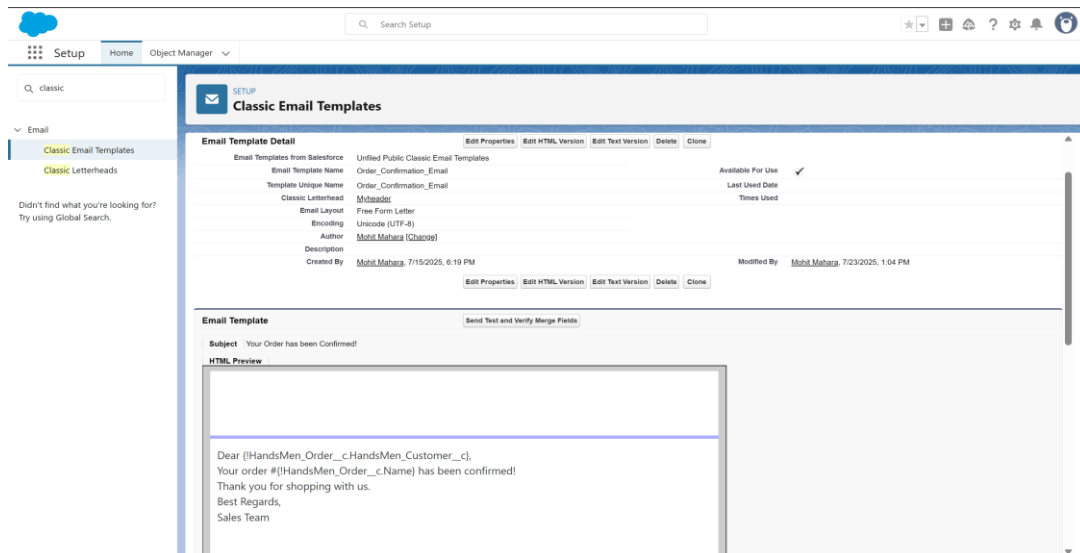
The screenshot shows the Salesforce Setup interface. On the left, the 'Setup' menu is open, and 'Users' is selected under 'User Management Settings'. The main content area shows the 'User Edit' form for 'Niklaus Mikaelson'. The form has tabs for 'General Information', 'Role', and 'Profile'. The 'General Information' tab is active, showing fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. The 'Role' dropdown is set to 'Sales', and the 'Profile' dropdown is set to 'Platform 1'. There are also checkboxes for 'Active', 'Marketing User', 'Offline User', 'Knowledge User', 'Flow User', 'Service Cloud User', 'Site.com Contributor User', 'Site.com Publisher User', 'WDC User', and 'Data.com User Type'. The 'Data.com User Type' dropdown is set to 'None'. The 'Data.com Monthly Addition Limit' is set to '300'. The 'Accessibility Mode (Classic Only)' checkbox is checked. The 'High-Contrast Palette on Charts' checkbox is checked. The 'Load Lightning Pages White' checkbox is checked.

7. Email Template & Alerts

Created three email templates:

- Order Confirmation - Sent on order status = Confirmed
- Low Stock Alert - Sent when Inventory < 5 units
- Loyalty Program Email - Sent when loyalty status changes

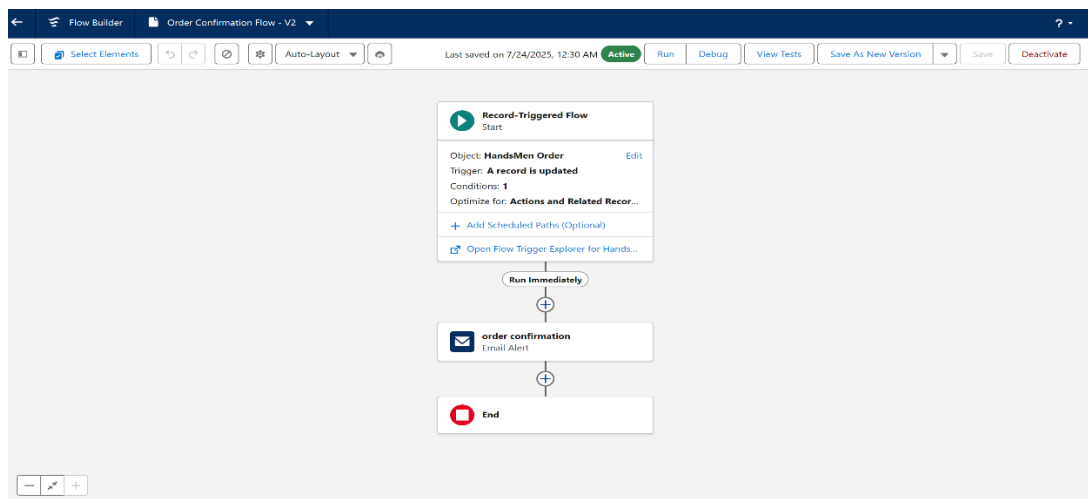
Corresponding Email Alerts were created using these templates and linked to automation flows.



8. Flow Implementations

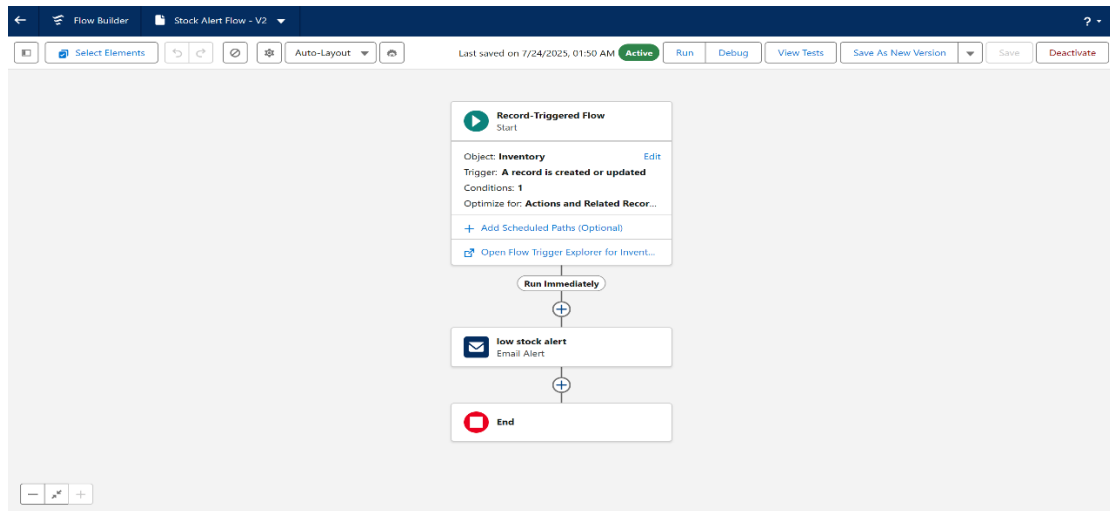
a. Order Confirmation Flow

- Trigger when an order is confirmed.
- Sends an Order Confirmation email to related customer.



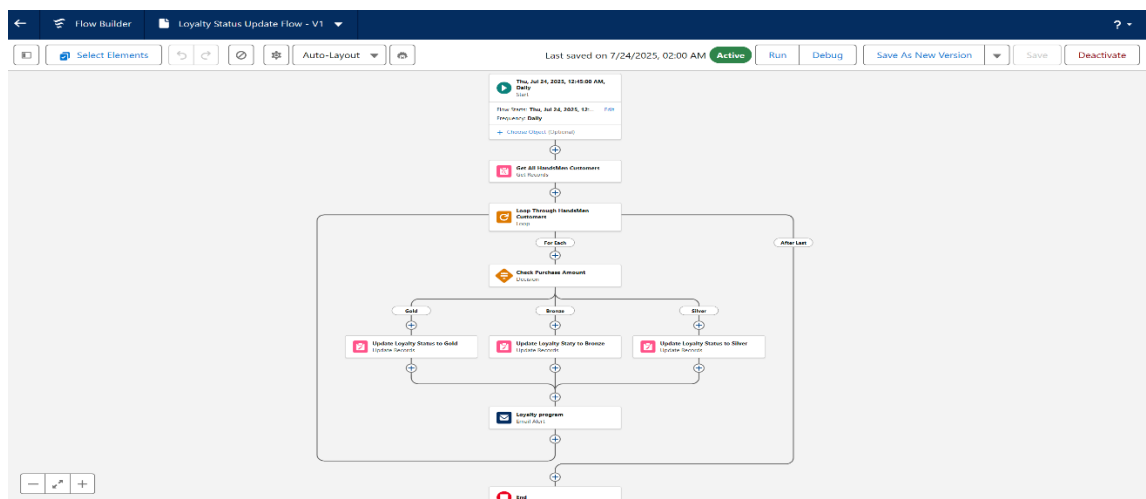
b. Stock Alert Flow

- Triggered when Inventory stock drops below 5.
- Sends Low stock email to Inventory Manager.



c. Loyalty Status Update Flow

- Runs daily at midnight
- Loop through customers and updates their Loyalty Status based on total purchases.



9. Apex Triggers

- **Order Total Trigger** : Auto-calculates Total Amount based on Quantity and unit place.
- **Stock Deduction Trigger** : Reduce Stock when an order is placed.
- **Loyalty Status Trigger** : Update Loyalty Status based on Total Purchases.

PROJECT EXPLANATION WITH REAL-WORLD EXAMPLE

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

1. Customer Registration

- A customer, John 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

- John decides to buy 2 shirts (each 500). An order is placed.
- In Salesforce: A new Order record is created.
- Apex Trigger: Automatically calculates $\text{Total_Amount_c} = 2 \times 500 = ₹1000$.

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

- John now has a total purchase of ₹1000.
- A trigger on Customer checks his total purchases.
Based on the value:
 - < ₹500 -> Bronze
 - ₹500 - ₹1000 -> Silver
 - ₹1000 -> Gold
- So, John becomes a Silver member.

6. Email Notification

- When a new order is placed or loyalty status is updated.
- Flow + Email Alert is triggered.
- John 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 1 Profile)
- **Kol Mikaelson**- *Inventory Role* (Platform 1 Profile)

SCREENSHOTS

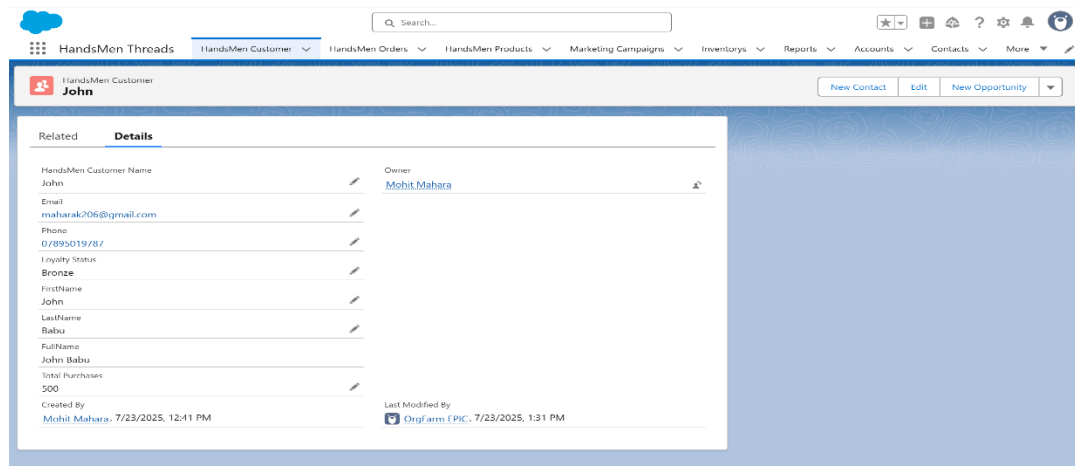


Fig. Customer Creation

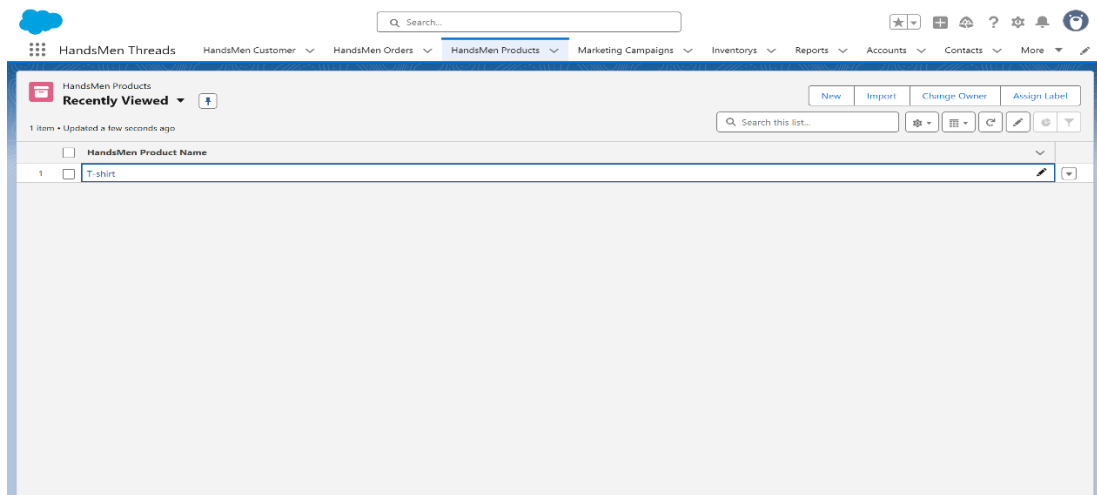


Fig. Products in Handsmen Thread

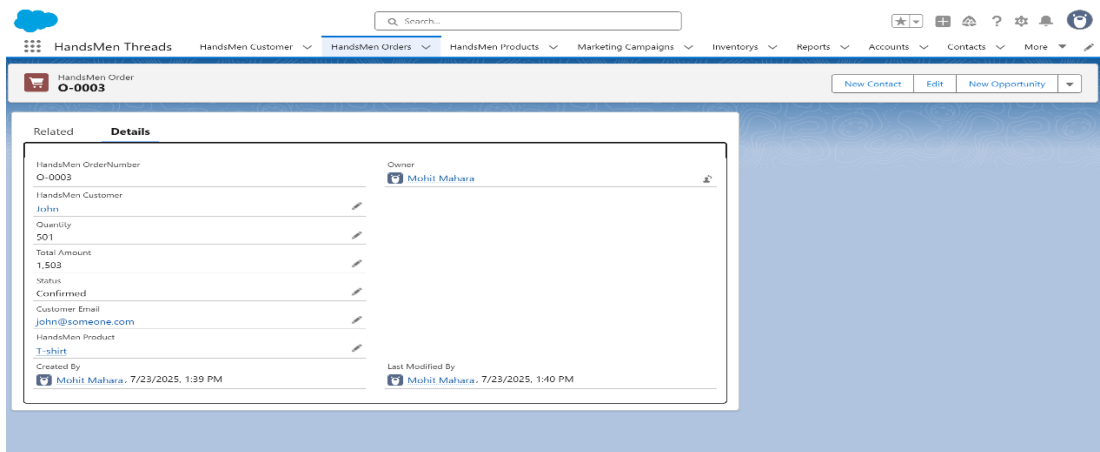


Fig. Order Confirmation For Customers

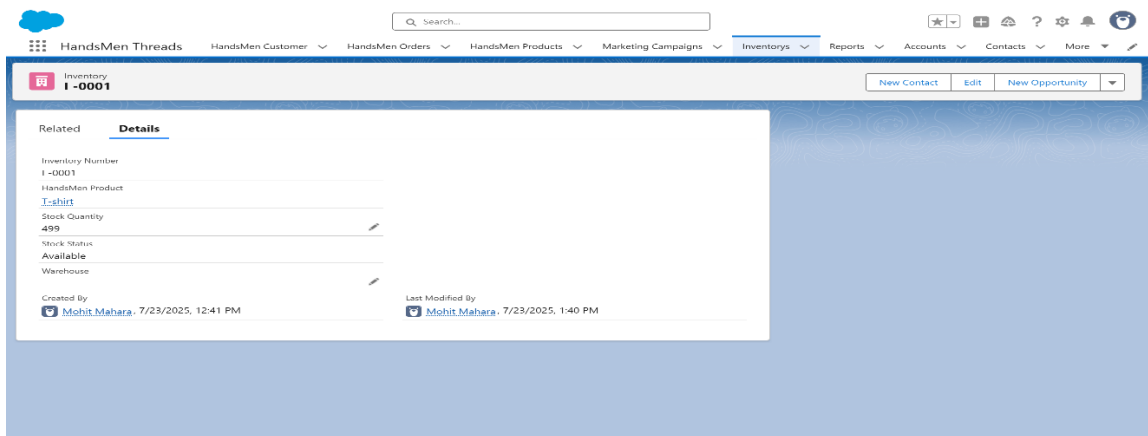


Fig. Inventory Creation

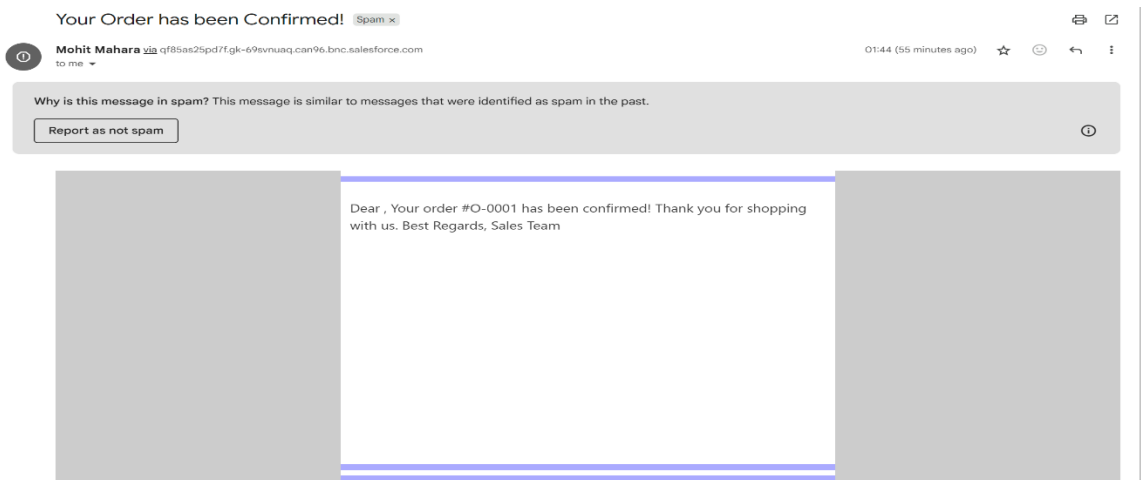


Fig. Order Confirmation Email

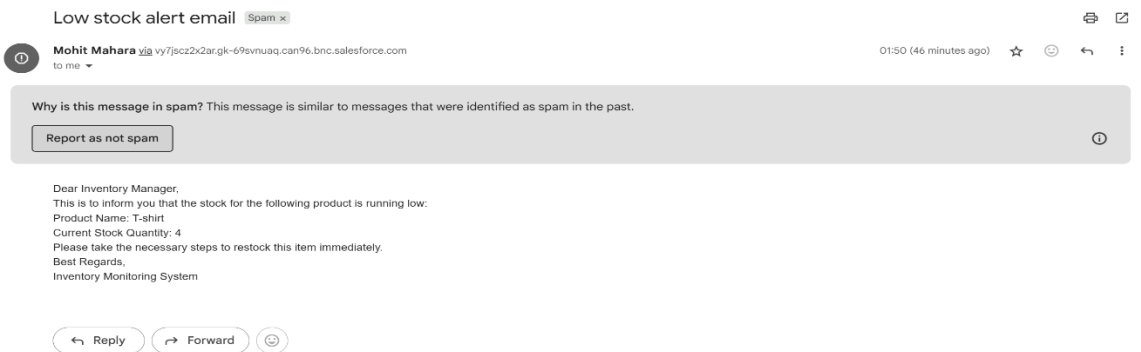


Fig. Low Stock Alert Email

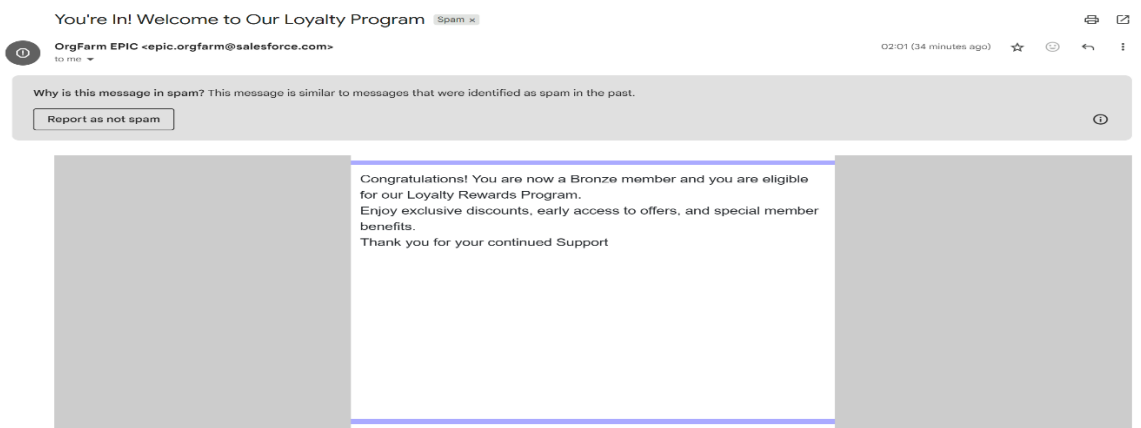


Fig. Loyalty Status Update Email

CONCLUSION

The HandsMen 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)

- Use Salesforce Einstein to provide personalized product suggestions based on past purchases.