

# **HandsMenThreads: Elevating Men's Fashion with Salesforce**

## **ABSTRACT**

Created a custom Salesforce CRM for HandsMen Threads, a leading fashion brand for men. The basic aim was to make customer management, order processing, inventory management, and marketing strategies more seamless so the brand could grow. We automated the important business processes with the help of the Salesforce cloud platform, while keeping data integrity intact and providing real-time insights into its operations. This custom solution includes custom objects, intelligent automated flows, strict validation rules, timely email notifications, and custom-coded Apex: all aimed at enhancing customer engagement, improving sales, avoiding stock issues, and giving a clear picture of the entire business.

## **OBJECTIVE**

The core aim of the project was to design and implement a custom Salesforce CRM for HandsMen Threads with the intent of streamlining day-to-day processes and improving customer satisfaction.

Main objectives are:

- Ensure that data input is highly accurate and consistent by strictly enforcing validations.
- Improve communication among the sales, inventory, and marketing departments.
- Furnish genuinely personalized customer experiences via automated communications and loyalty initiatives.
- Instantaneous insight for our teams on inventory levels, customer interactions, and sales performance.

## TECHNOLOGY DESCRIPTION

### Salesforce Platform

Salesforce is our CNS, a cloud-based CRM tool that allows us to manage customers thoroughly. It has customer service-optimizing tools, marketing campaign-enhancing tools, and sales-increasing tools, all kinds of task automation. We applied both its user-friendly drag-and-drop functions and also the more robust coding capabilities for more complex needs such as Apex and Flows.

### Custom Objects

These are like our custom-built digital filing cabinets within Salesforce, specifically designed to store HandsMen Threads' unique information:

- **Customer\_c:** This is where we keep all the juicy details about each customer – personal info, contact details, and their current loyalty status.
- **Order\_c:** This object meticulously records every customer order, linking it back to the specific customer and products involved, along with the order date, total amount, and quantity.
- **Marketing\_Campaign\_c:** We use this to track all our marketing initiatives and promotions, helping us see what's working best.
- **Product\_c:** Here, we manage every single product, from its name and description to its price and how many we have in stock.

### Tabs

The function of tabs is very much simplified as frequently tapped associations. In addition, there are also custom tabs developed for each proprietary object, as in "Products" or "Orders," ensuring easy viewing, creation, and management of records by our team within the low application "HandsMen Threads"; thus becoming open and straight.

### Custom App

A customized Lightning Application was developed and christened "HandsMen Threads." This application stands as the linchpin of operations for the team by bringing all relevant tabs-Customer, Order, Product, Inventory, Campaign, Reports-under a single roof for maximum efficiency.

## **Profiles & Roles**

These elements are crucial for regulating data access and user capabilities within the system.

- **Profiles:** These configurations delineate a user's permissions, including visibility of objects and fields, and the overall presentation of their interface. Custom profiles, such as a "HandsMen Sales Profile," are established to align with distinct job functions.
- **Roles:** Roles govern data visibility in accordance with the organizational hierarchy. For instance, a "Sales Manager" would have access to all sales data, whereas a "Sales Representative" would be limited to their individual data, while the reporting structure remains transparent.

## **Permission Sets**

These function as supplemental permission sets, providing users with enhanced access to specific tools or functionalities beyond their standard profile configurations. This approach allows for more granular control without altering primary profile settings.

## **Validation Rules**

These are our data quality guardians. Validation rules ensure that the information entered by users complies with our standards prior to being saved. For instance:

- Email addresses are validated to conform to a standard format (e.g., must contain "@gmail.com").
- Orders are prevented from being saved if they would result in a negative product stock balance.

## **Email Templates & Alerts**

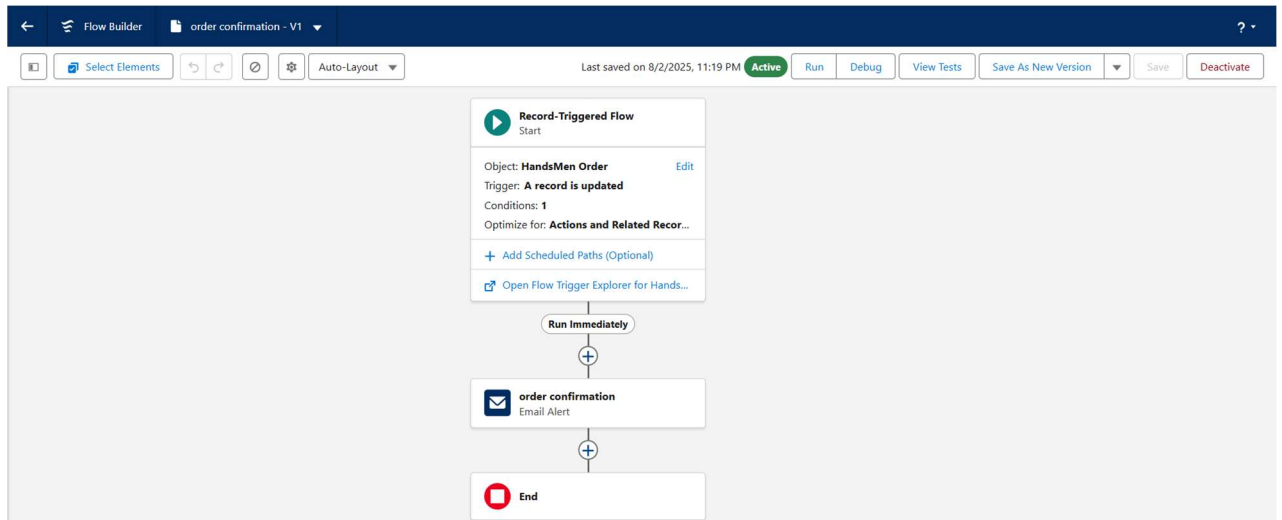
These facilitate consistent and automated communication:

- **Email Templates:** These are pre-designed email layouts (e.g., our "Order Confirmation" template) that ensure the professional and consistent appearance of our messages.
- **Email Alerts:** These are automatic email notifications triggered by specific conditions, such as the receipt of a new order or a change in a customer's loyalty status.

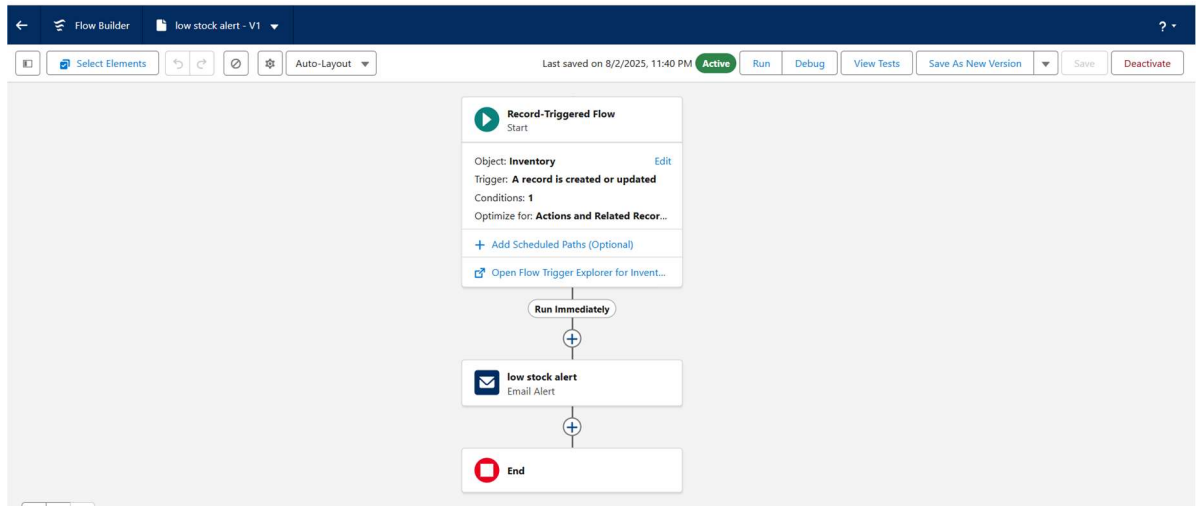
## Flows

Flows are our visual automation tools – they let us build complex business logic without writing a single line of code! Here are some key flows we built:

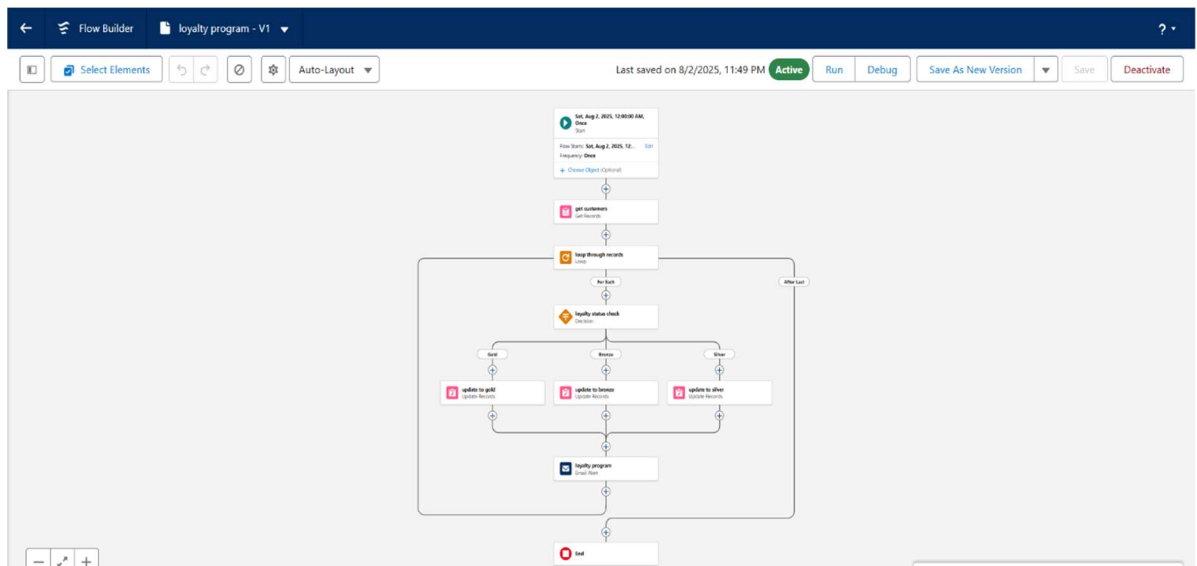
1. **Email Notification Flow:** This one automatically sends an order confirmation email to the customer the moment a new order is placed



2. **Stock Update Flow:** When an order is created or changed, this flow automatically updates the product's available stock.



3. **Scheduled Loyalty Update Flow:** This flow runs every day (say, at midnight) to check and update customer loyalty statuses based on their total purchase amounts.



## Apex

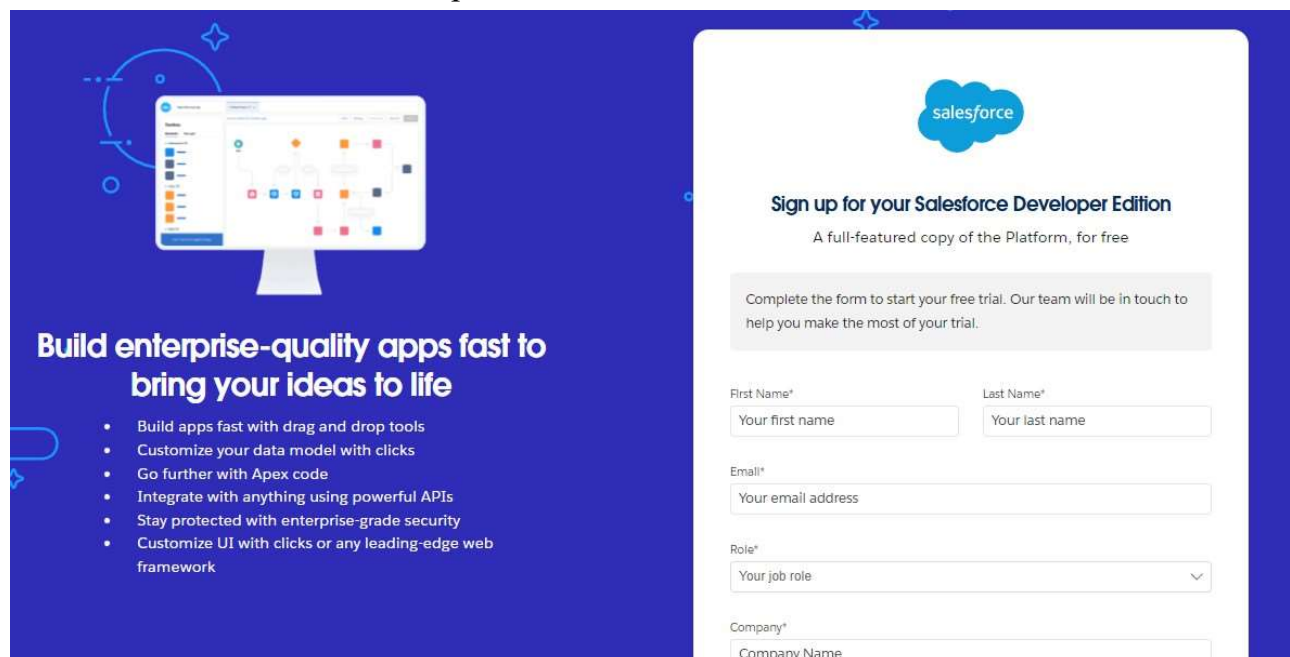
Apex, Salesforce's proprietary programming language, is utilized to develop specific or intricate business logic that cannot be accommodated by standard functionalities. Our Apex triggers include:

- **Order Total Trigger:** This trigger automates the calculation and update of the `Total_Amount` field on an order, based on the quantity and unit price.
- **Stock Deduction Trigger:** This trigger operates in the background to ensure accurate stock reduction from a product upon order confirmation. It functions in conjunction with our validation rules to prevent overselling.
- **Loyalty Status Trigger:** This trigger dynamically updates a customer's `Loyalty_Status` field in real-time, based on their cumulative purchase history.

## DETAILED PROJECT EXECUTION

### 1. Salesforce Developer Org Setup

We set up a new Salesforce Developer Org at <https://developer.salesforce.com/signup>, our main environment for all development work.



## 2. Custom Object Creation

The foundational data structure was constructed through the creation of custom objects and their corresponding fields, designed to store all essential business information:

- **HandsMen Customer (Customer c):** Contains details pertinent to customers (Name, Email, Phone, Address, Loyalty\_Status c).
- **HandsMen Product (Product c):** Encompasses product information (Name, Description, Unit\_Price c, Stock c).
- **HandsMen Order (Order c):** Records customer orders (Date, Quantity c, Total\_Amount c, with links to Customer and Product data).
- **Marketing Campaign (Marketing\_Campaign c):** Manages information related to promotional activities.

## 3. Custom Lightning App

The "HandsMen Threads" Lightning App has been developed to consolidate all pertinent tabs, including Customer, Order, Product, Inventory, Campaign, and Reports, into a unified and user-friendly workspace for our teams.

## 4. Validation Rules

We implemented rules to ensure data quality

- **Product Stock:** Prevents Stock\_c from being less than zero.
- **Customer Email:** Requires the Email field to contain "@gmail.com".

## 5. User Profiles & Roles

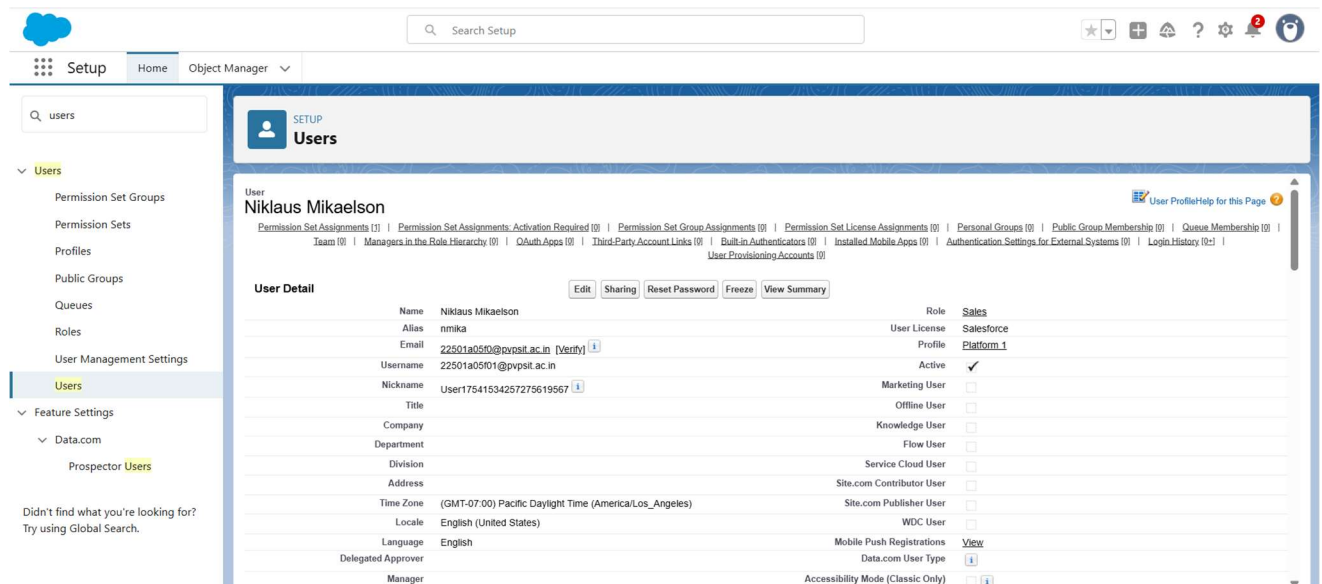
We configured specific profiles and roles to manage user access and data visibility:

- **Profiles:** Cloned "Standard User" to create profiles like "HandsMen Sales Profile."
- **Roles:** Defined a hierarchy including "Sales Manager," "Inventory Manager," etc., controlling data visibility based on responsibilities.

## 6. User Creation

We created new users and assigned them to their respective roles and profiles (e.g., Niklaus Mikaelson for Sales, Kol Mikaelson for Inventory) to demonstrate the system's multi-user capabilities.

## 7. Email Templates



Custom email templates were designed for automated and consistent communication, such as "Order Confirmation" and "Loyalty Status Update."

## 8. Flow Implementations

### a. Email Notification Flow (Record-Triggered)

Sends an order confirmation email to the customer when a new order is created.

### b. Stock Update Flow (Record-Triggered)

Automatically updates product stock when an order is created or changed.

### c. Scheduled Loyalty Update Flow (Scheduled-Triggered)

Runs daily to update customer loyalty status based on their total purchase amounts.



## 9. Apex Triggers

### a. Order Total Trigger (OrderTrigger)

Automatically calculates and updates the total amount of an order based on quantity and unit price.

### b. Stock Deduction Trigger (ProductStockUpdateTrigger)

Ensures product stock is correctly reduced after an order.

### c. Loyalty Status Trigger (CustomerLoyaltyUpdateTrigger)

Updates a customer's loyalty status in real-time based on their cumulative purchase history.

## PROJECT DEMONSTRATION: A Real-World Example

To show you how all this magic comes together, let's walk through a typical customer experience with HandsMen Threads:

### 1. Customer Registration:

Imagine a new customer, "Ajay Kapoor" walks into our store.

A sales rep quickly goes to the "HandsMen Customer" tab in our app and clicks "New."

They enter Ajay's details: Name, Phone, and Email (let's say "[ajay.kapoor@gmail.com](mailto:ajay.kapoor@gmail.com)").

**Validation Rule in Action:** If the rep accidentally types "[ajay.kapoor@yahoo.com](mailto:ajay.kapoor@yahoo.com)," the system immediately pops up an error: "Please enter a valid Gmail address." This keeps our data clean!

Once everything's correct, Ajay Kapoor is officially in our system.

### 2. Product Setup:

Meanwhile, our inventory manager ensures all products are correctly listed under the "HandsMen Product" tab.

For example, a "Men's Suit - Classic Blue" is listed with a price of \$500 and 10 in stock.

### 3. Order Placement:

Ajay Kapoor decides he loves the "Men's Suit - Classic Blue" and wants one.

The sales rep creates a new order under the "HandsMen Order" tab.

They link Ajay Kapoor to the order, select the "Men's Suit - Classic Blue," and enter a quantity of 1.

**Apex Trigger in Action:** The moment the order is saved, our OrderTotalTrigger automatically calculates and fills in the Total\_Amount\_c as \$500 (1 suit \* \$500). No manual math needed!

**Email Notification Flow in Action:** Almost instantly, the Email Notification Flow kicks in and sends Ajay Kapoor an "Order Confirmation" email to his Gmail address, detailing his purchase.

### 4. Inventory Update:

**Stock Update Flow in Action:** Right after the order is saved, the "Men's Suit - Classic Blue" stock automatically updates from 10 to 9.

**Validation Rule in Action:** What if the rep tried to order 11 suits when only 10 were left? Our validation rule on the Product\_c would block the order, preventing us from selling something we don't have!

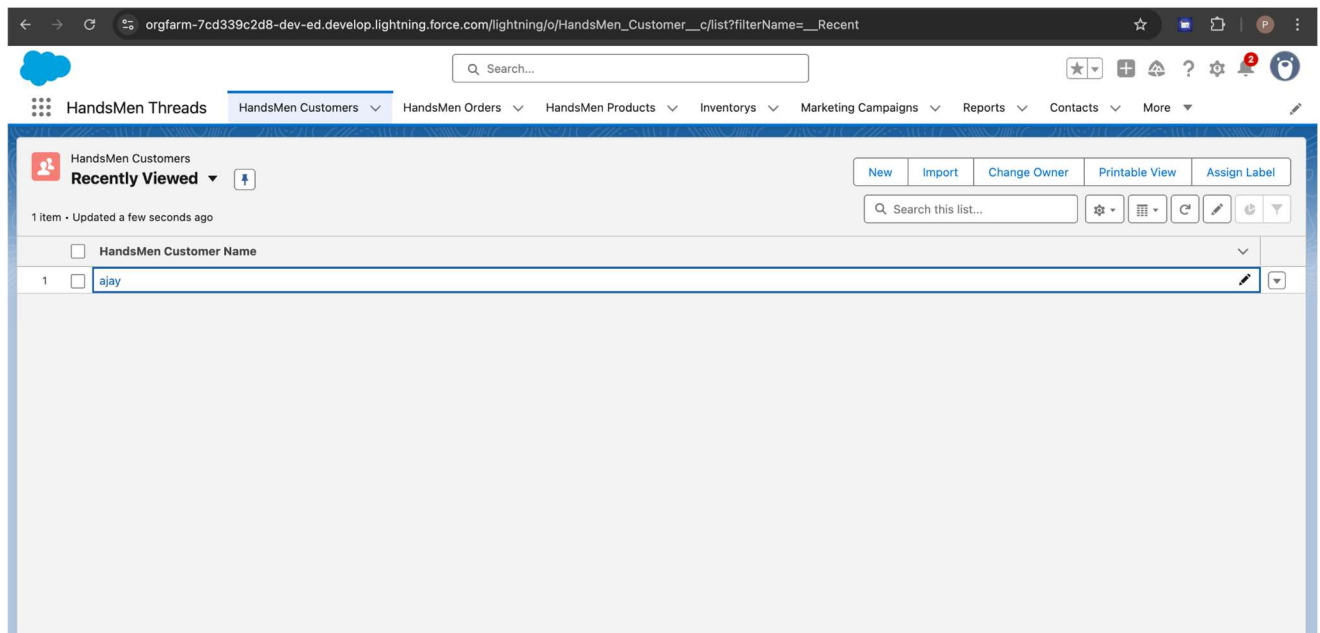
### 5. Loyalty Status Update:

**Apex Trigger in Action:** As soon as Ajay Kapoor's order is processed and his Total\_Amount\_c updates, our CustomerLoyaltyUpdateTrigger recalculates his total purchases. If this purchase pushes him over a loyalty threshold (e.g., becoming a "Silver Member"), his Loyalty\_Status\_c on his customer record instantly updates.


**Scheduled Flow in Action:** Just to be extra sure, our "Scheduled Loyalty Update" flow also runs daily. So, even if there were any missed updates, it would catch them and ensure all customer loyalty statuses are spot-on.

This whole process showcases how our Salesforce CRM solution for HandsMen Threads seamlessly manages everything, from greeting a new customer to processing their order and nurturing their loyalty!








## SCREENSHOTS










**Fig: Custom App for HandsMen Threads**

HandsMen Customer Name	Owner
ajay	 <a href="#">Potluri Nikitha</a>
Email	
<a href="mailto:nikithapotluri17@gmail.com">nikithapotluri17@gmail.com</a>	
Phone	
Loyalty Status	
Bronze	
FirstName	
Ajay	
LastName	
Kapoor	
FullName	
Ajay Kapoor	
Total Purchases	
500	

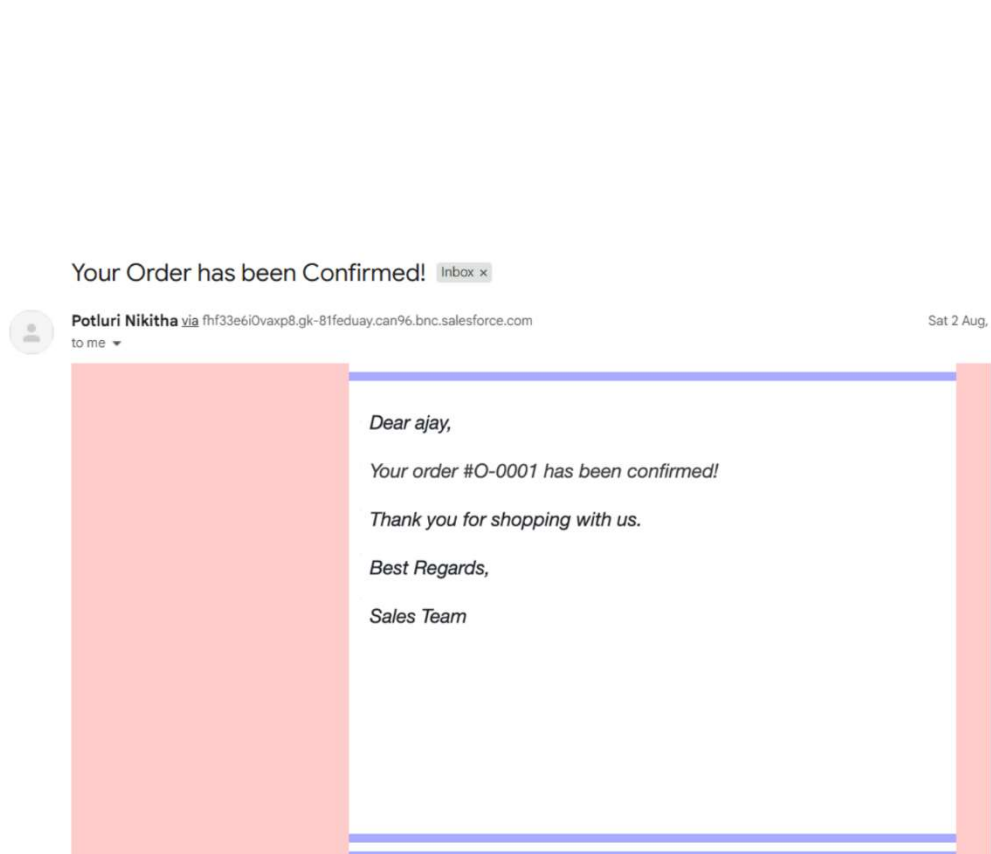
**Fig: Customer in HandsMen Threads**

HandsMen Product Name		Owner	
t-shirt cloth		 Potluri Nikitha	
Order			
SKU			
Price			
Stock Quantity			





**Fig: Product in HandsMen Threads**

HandsMen OrderNumber		Owner	
O-0002		 Potluri Nikitha	
Customer			
<a href="#">ajay</a>			
Status			
Confirmed			
Quantity			
Total Amount			
Customer Email			
<a href="mailto:22501a05f0@pvpsit.ac.in">22501a05f0@pvpsit.ac.in</a>			

**Fig: Order in HandsMen Threads**



**Fig: Order Confirmation Email Sent to Customer**

Inventory Number	I -0001
Product	<a href="#">t-shirt cloth</a>
Stock Quantity	4 
Stock Status	Low Stock
Warehouse	
Created By	 <a href="#">Potluri Nikitha</a> , 8/2/2025, 9:44 AM
Last Modified By	 <a href="#">Potluri Nikitha</a> , 8/2/2025

**Fig: Inventory in HandsMen Threads**

## Low Stock Alert Email Inbox x



**Potluri Nikitha** via [u46vj78z5ykq.gk-81feduay.can96.bnc.salesforce.com](#)  
to me ▾

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

**Fig: Low Stock Alert**

## Loyalty Program Email Inbox x



**OrgFarm EPIC** <[epic.orgfarm@salesforce.com](#)>  
to me ▾

Sat 2 Aug, 2

Congratulations! You are now a Bronze member and you are eligible for our Loyalty Rewards Program.  
Enjoy exclusive discounts, early access to offers, and special member benefits.  
Thank you for your continued Support.

**Fig: Customer Mail Showing Updated Loyalty Status**

## **CONCLUSION**

HandsMen Threads are empowered operationally to a great extent within Salesforce CRM. The implemented system ensures management of core business processes, market relationships, and complete data integrity for sales, inventory, and marketing functions. Built around Salesforce's advanced functionality-including custom objects, automated workflows (flows), rigorous data validation rules, prompt notifications, and custom code (Apex)-we've made a unified platform. This will provide immediate insight to HandsMen Threads. It will make informed decisions and developed groundwork to take things forward as well as assuring better customer experiences.

## **FUTURE SCOPE**

All our continuous efforts are meant to improve the HandsMen Threads CRM even further.

- **AI-Powered Recommendations (Salesforce Einstein):** Integrating Salesforce Einstein would allow personalized product recommendations for customers, based on either prior purchases or preferences of similar customers. This could provide a significant increase in sales.
- **Advanced Reports & Dashboards:** Within Salesforce, we propose building advanced sales and inventory dashboards. They would provide increased visibility to performance, help in recognizing trends, and assist in making strategic decisions.
- **Messaging Integration:** Integration with popular messaging applications such as WhatsApp or SMS would allow dispatching real-time order confirmations, shipping updates, loyalty program announcements, and personalized marketing messages directly to customers' mobile devices.
- **Customer Portal:** Imagine an online portal where customers can log in, check-order history, keep track of loyalty points, update personal information, and seek support independently.
- **Mobile App Development:** We can create a full-blown app for our in-store teams using the Salesforce Mobile SDK. The app will do inventory management, order processing, and access customer information right from their mobile devices.