

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

## **ABSTRACT**

We developed a bespoke Salesforce CRM for HandsMen Threads, a prominent men's fashion brand. The core objective was to simplify customer management, order processing, inventory optimization, and marketing strategies to support business growth. Utilizing the robust Salesforce cloud platform, we've automated essential business processes, ensured data integrity, and offered real-time operational insights. Our solution incorporates custom objects, intelligent automated flows, stringent validation rules, timely email notifications, and custom Apex code. These elements are designed to boost customer engagement, drive sales, prevent stock problems, and provide a clear overview of the entire business.

## **OBJECTIVE**

Our primary objective was to design and deploy a bespoke Salesforce CRM for HandsMen Threads, aiming to optimize daily operations and enhance customer satisfaction.

Main objectives are:

- Ensure highly accurate and consistent data input through rigorous validation protocols.
- Provide our teams with immediate transparency regarding inventory levels, customer interactions, and sales metrics.
- Enhance interdepartmental collaboration and communication among sales, inventory, and marketing teams.
- Furnish genuinely personalized customer experiences via automated communications and loyalty initiatives.

## TECHNOLOGY DESCRIPTION

### Salesforce Platform

Salesforce functions as our central nervous system, a cloud-based Customer Relationship Management (CRM) platform that facilitates comprehensive customer management. It incorporates tools designed to automate tasks, enhance customer service, optimize marketing campaigns, and increase sales. We utilized both its intuitive drag-and-drop functionalities and its robust coding capabilities, such as Apex and Flows, for more intricate requirements.

### 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.
- **Product\_c:** Here, we manage every single product, from its name and description to its price and how many we have in stock.
- **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.

### Tabs

Tabs function as readily accessible shortcuts. Custom tabs have been developed for each proprietary object, such as "Products" or "Orders," to facilitate efficient viewing, creation, and management of records by our team directly within the "HandsMen Threads" application.

### Custom App

A bespoke Lightning Application, designated "HandsMen Threads," was developed. This application serves as the team's central operational hub, integrating all pertinent tabs (Customer, Order, Product, Inventory, Campaign, Reports) to facilitate a highly efficient workflow.

## **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**

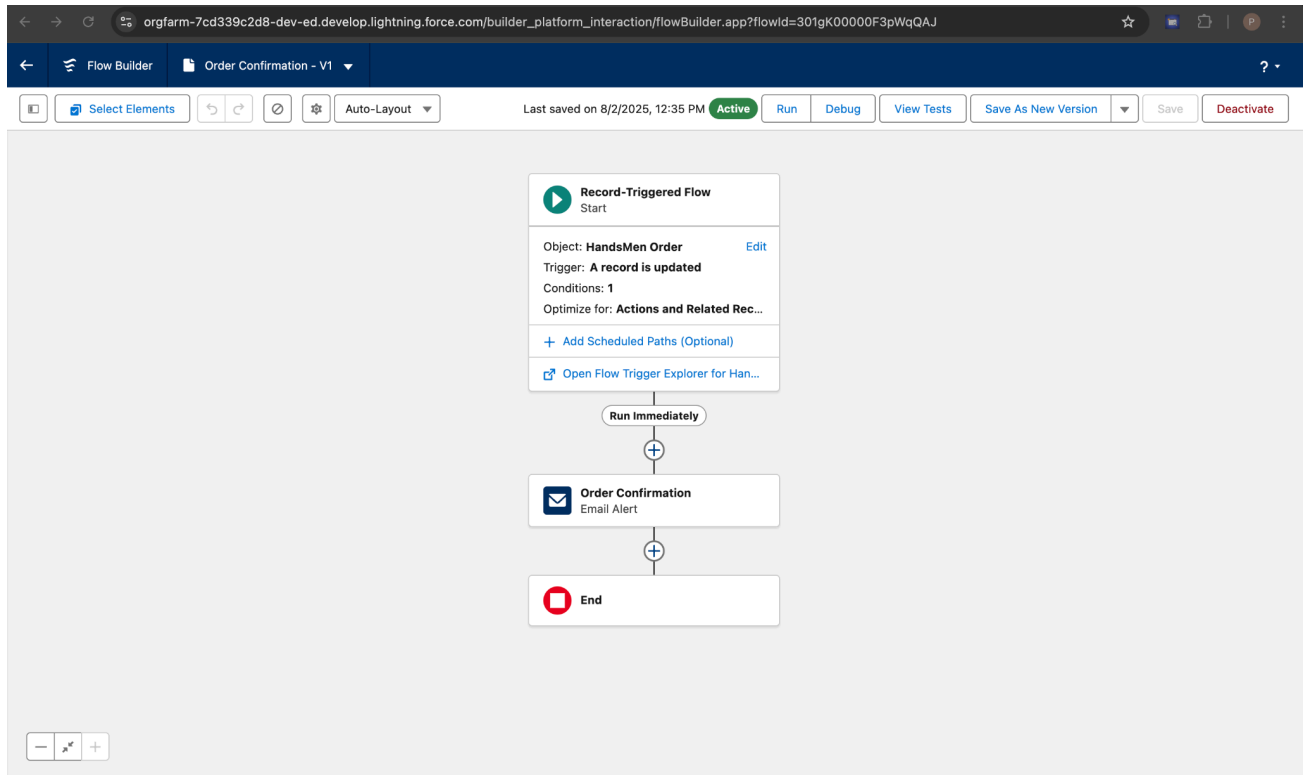
These facilitate consistent and automated communication:

- **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.

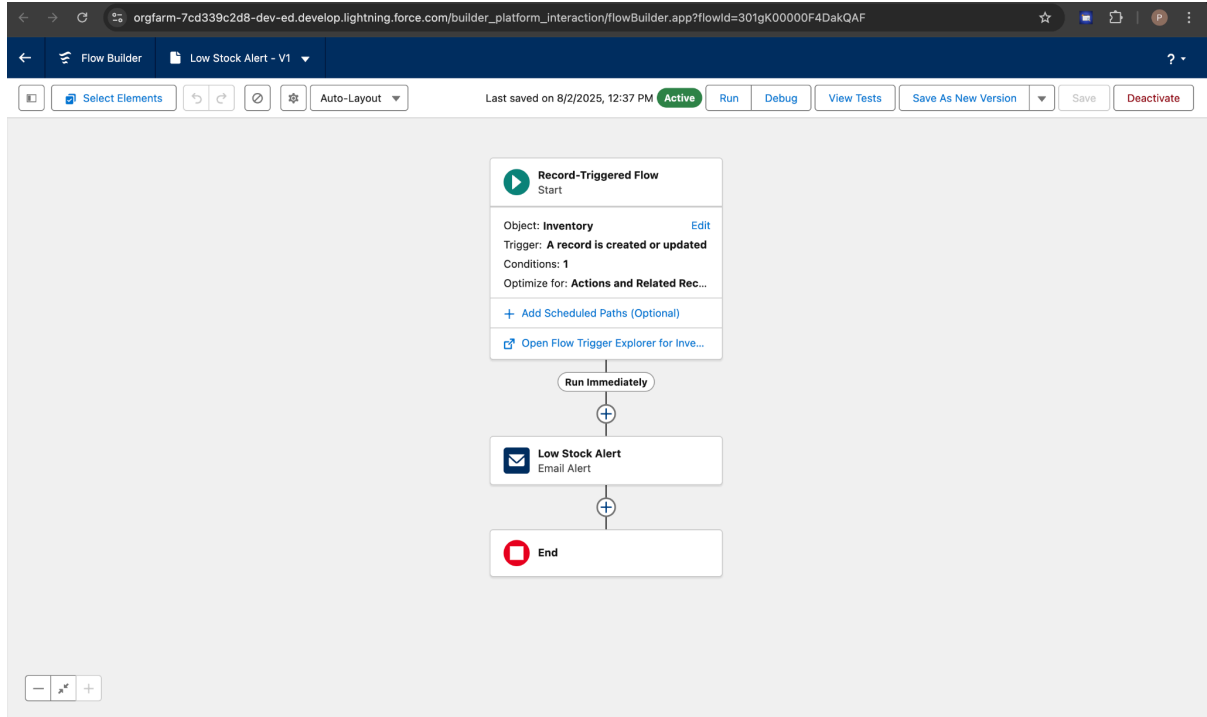
## Flows

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:

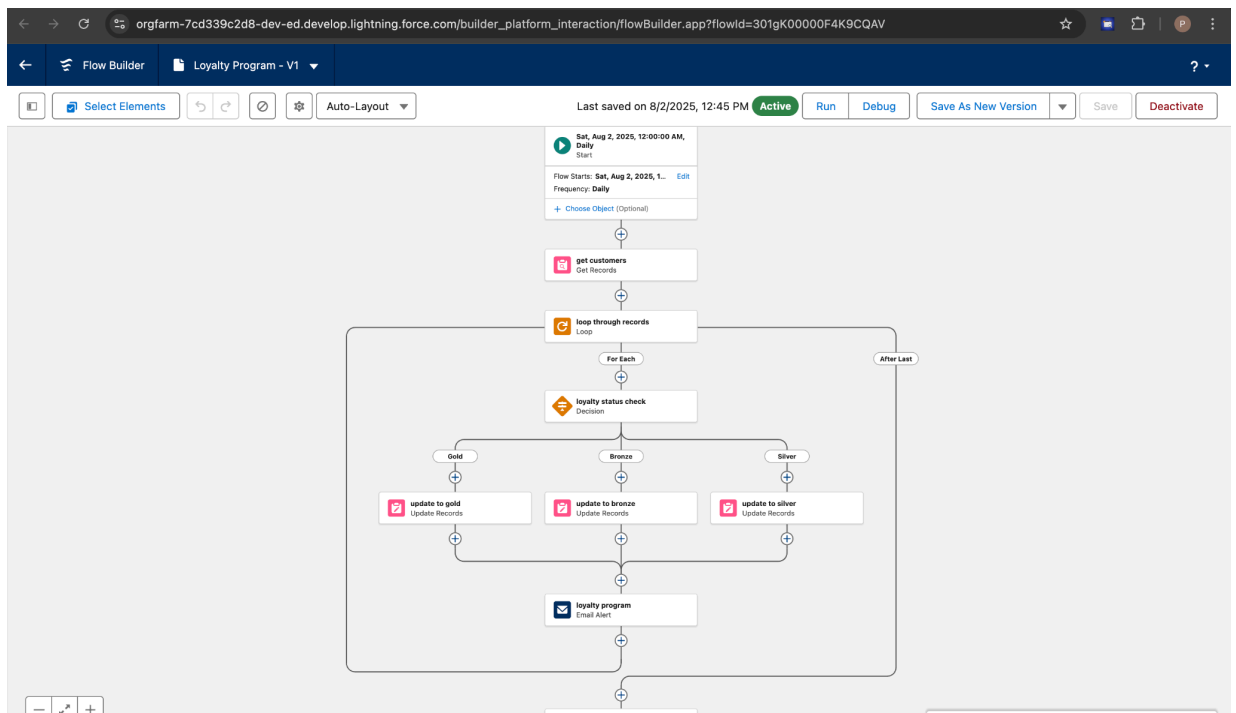
1. **Email Notification Flow:** This one automatically sends an order confirmation email to the customer the moment a new order is placed



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

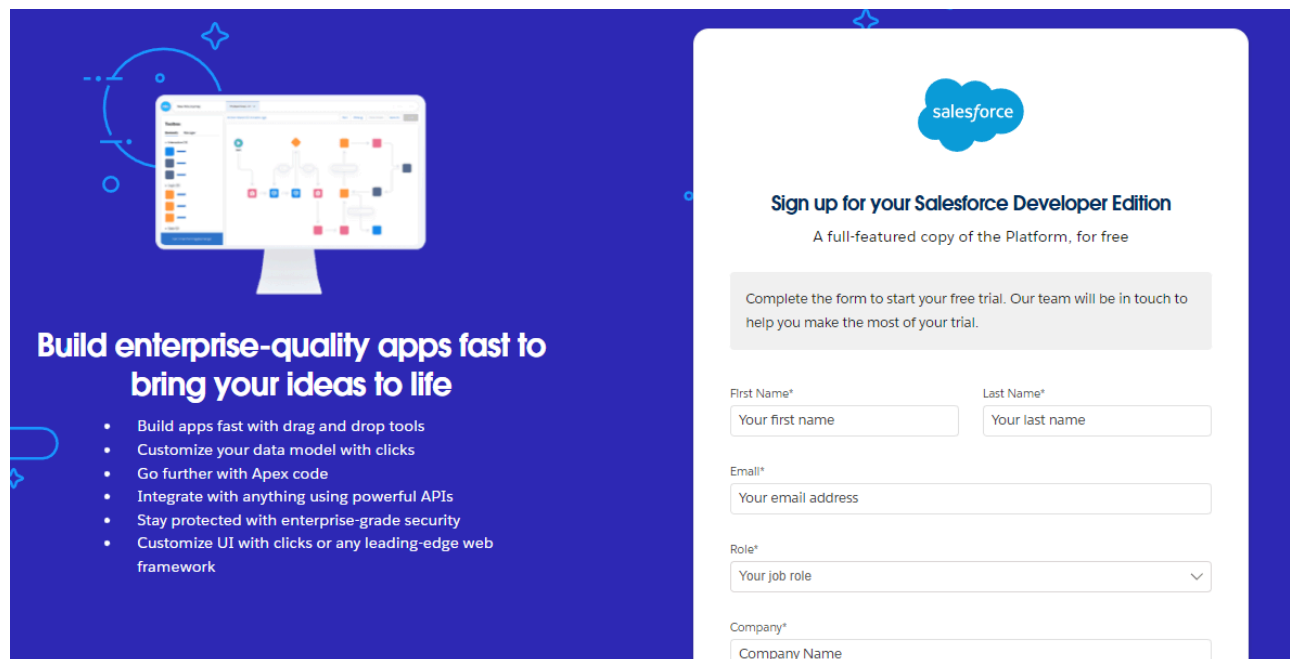
Apex, Salesforce's proprietary programming language, is utilized to develop specific or intricate business logic that cannot be accommodated by standard functionalities. Our Apex triggers include:

- **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.

The screenshot shows the Salesforce Setup interface for user management. The left sidebar contains a navigation menu with options like Setup, Home, Object Manager, Users, Permission Set Groups, Profiles, Public Groups, Queues, Roles, User Management Settings, Feature Settings, Data.com, Service, Embedded Service, User Interface, and Console Settings. The main content area displays the 'Users' section for 'Niklaus Mikaelson'. It includes a 'User Detail' section with fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Delegated Approver, Manager, Receive Approval Request Emails, Federation ID, App Registration: One-Time Password Authenticator, App Registration: Salesforce Authenticator, and Security Key (U2F or WebAuthn). The right side of the 'User Detail' section shows the 'Role' (Sales), 'User License' (Salesforce), 'Profile' (Platform 1), and various checkboxes for user permissions like 'Active', 'Marketing User', 'Offline User', 'Knowledge User', 'Flow User', 'Service Cloud User', 'Site.com Contributor User', 'Site.com Publisher User', 'WDC User', 'Mobile Push Registrations', 'Data.com User Type', 'Accessibility Mode (Classic Only)', 'Debug Mode', 'High-Contrast Palette on Charts', 'Load Lightning Pages While Scrolling', 'Salesforce CRM Content User', and 'Receive Salesforce CRM Content Email Alerts'.

## 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 Kumar" walks into our store.

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

They enter John's details: Name, Phone, and Email (let's say "[john.doe@gmail.com](mailto:john.doe@gmail.com)").

**Validation Rule in Action:** If the rep accidentally types "john.doe@yahoo.com," the system immediately pops up an error: "Please enter a valid Gmail address." This keeps our data clean!

Once everything's correct, John Doe 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:

John Doe 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 John Doe 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 John Doe 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 John Doe'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

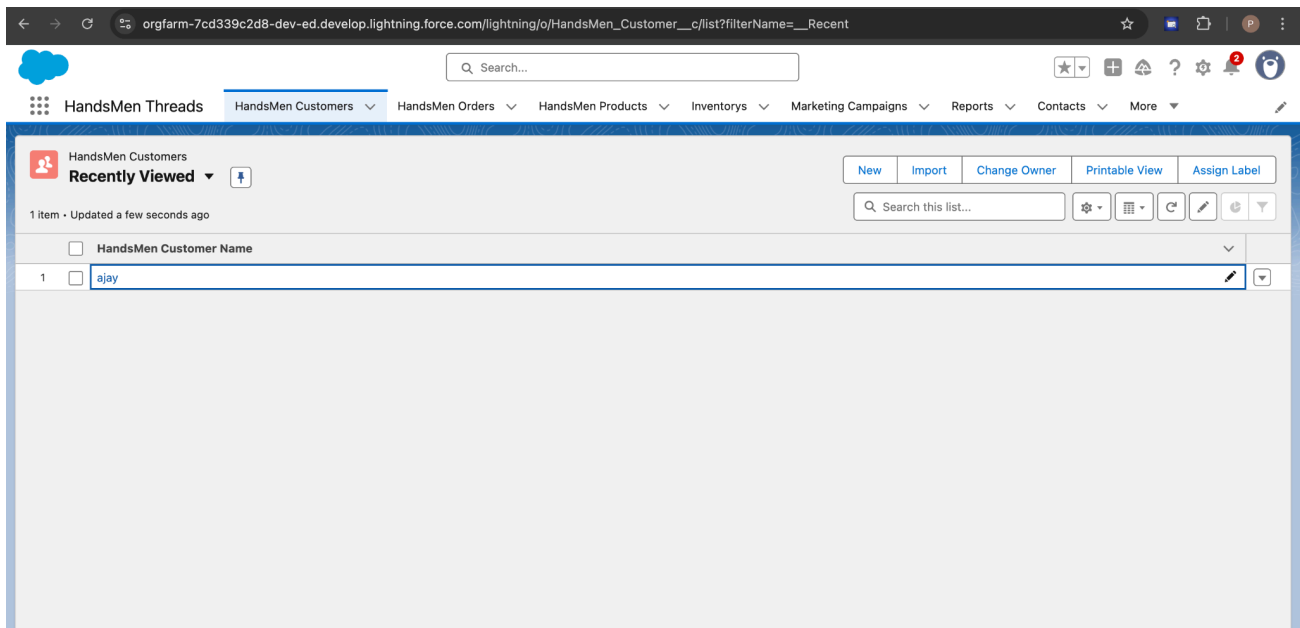


Fig: Custom App for HandsMen Threads

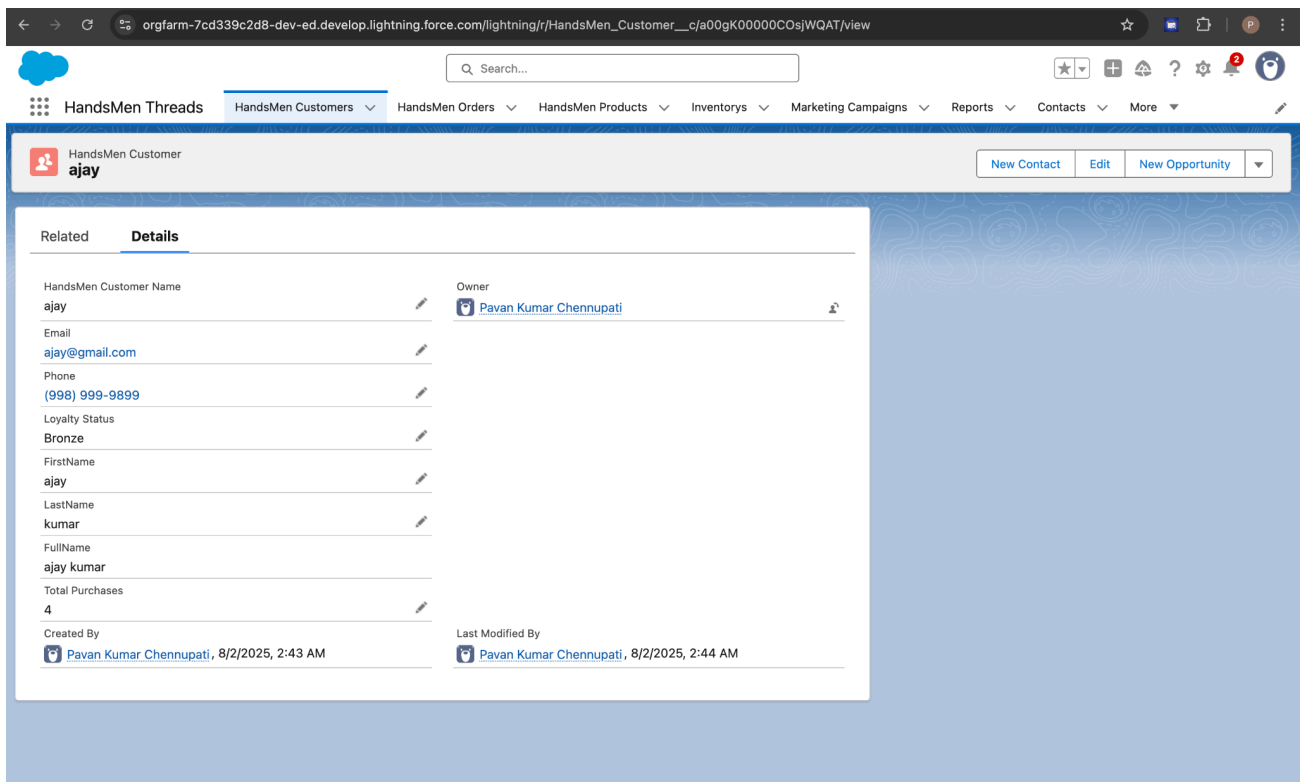
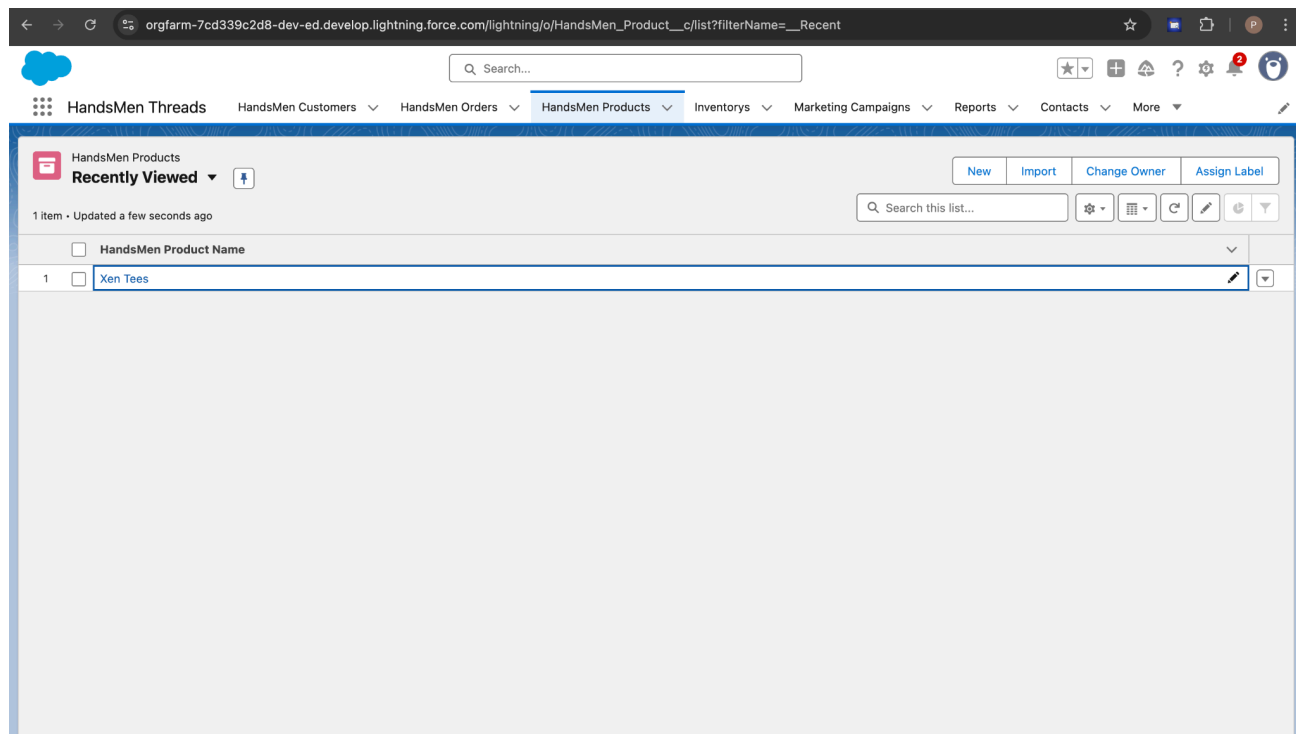
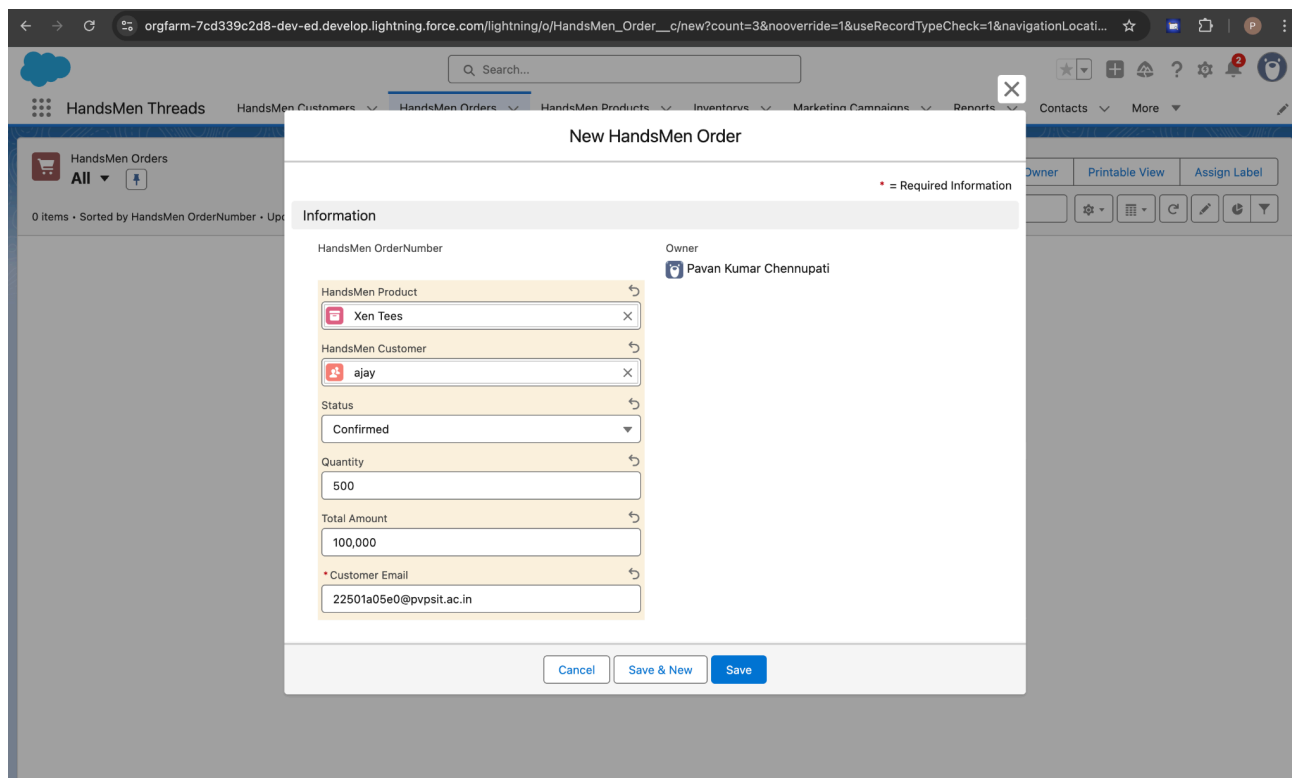


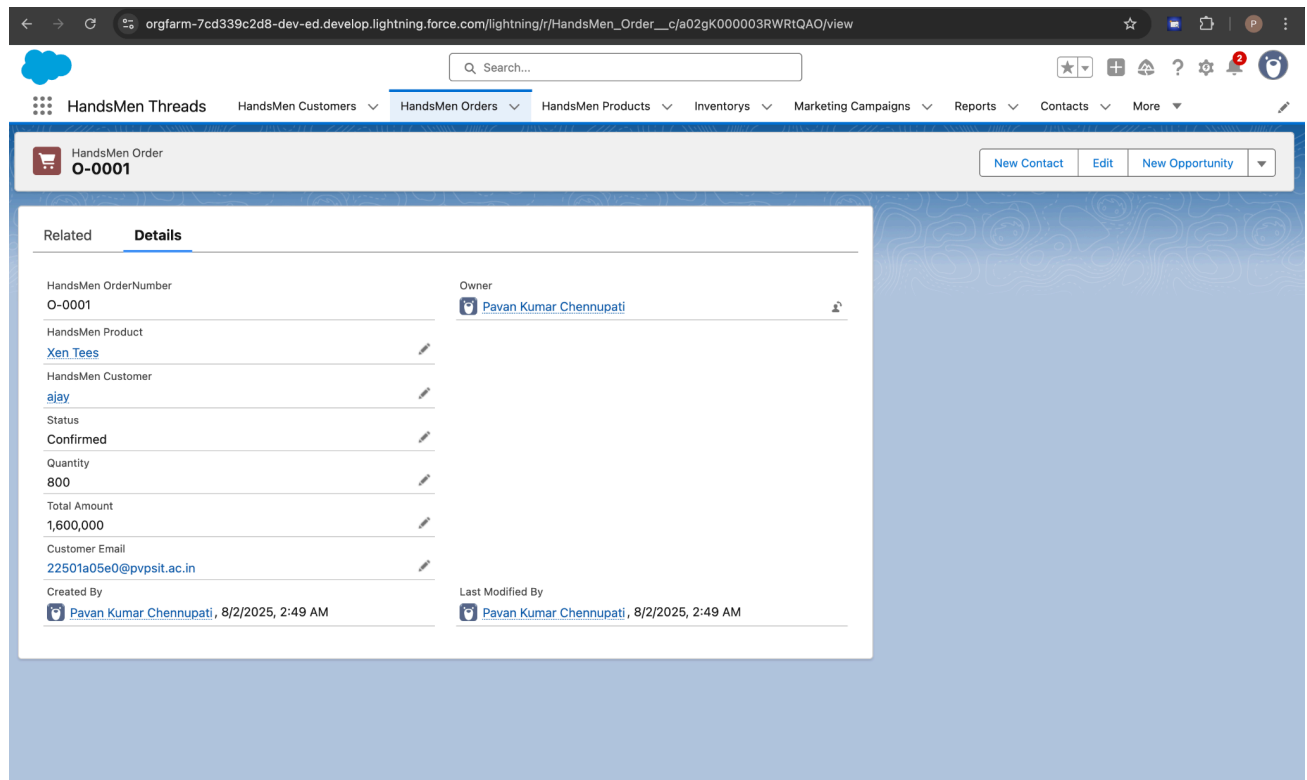
Fig: Customer Creation in HandsMen Threads



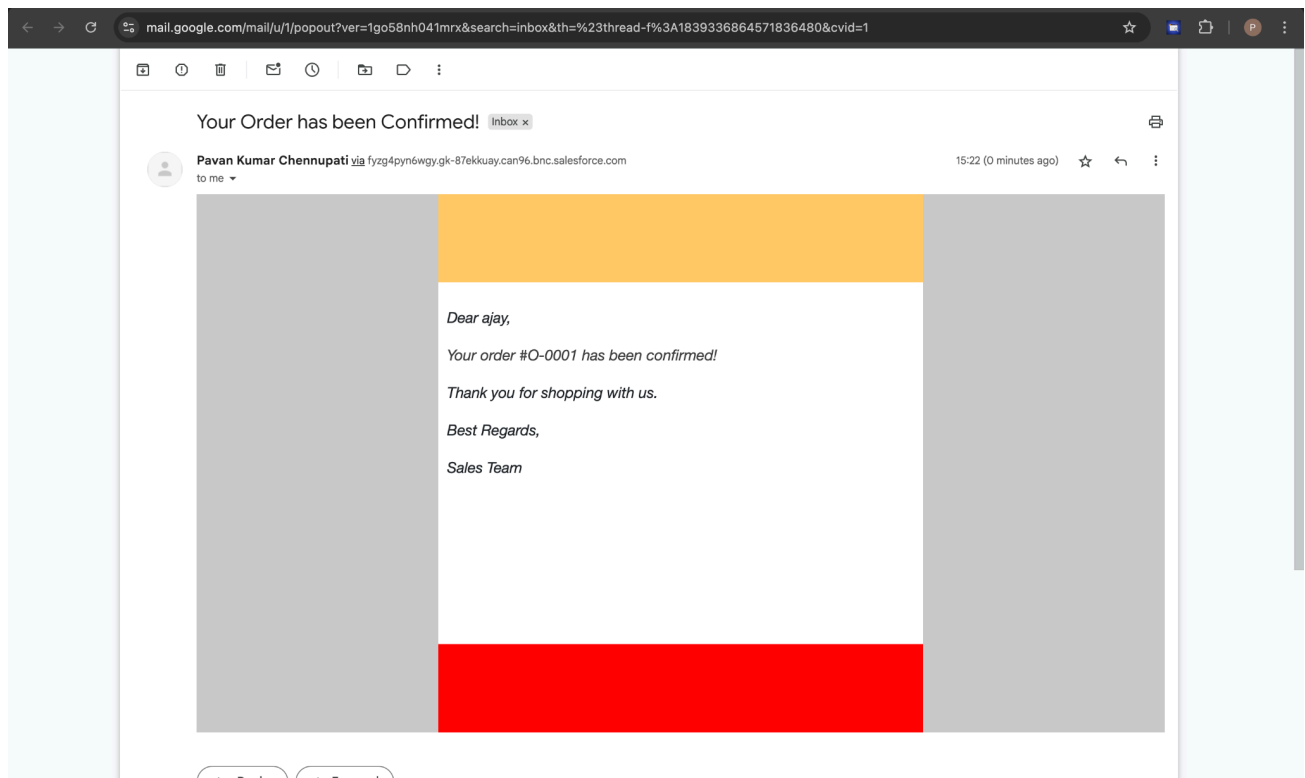
**Fig: Product List View**



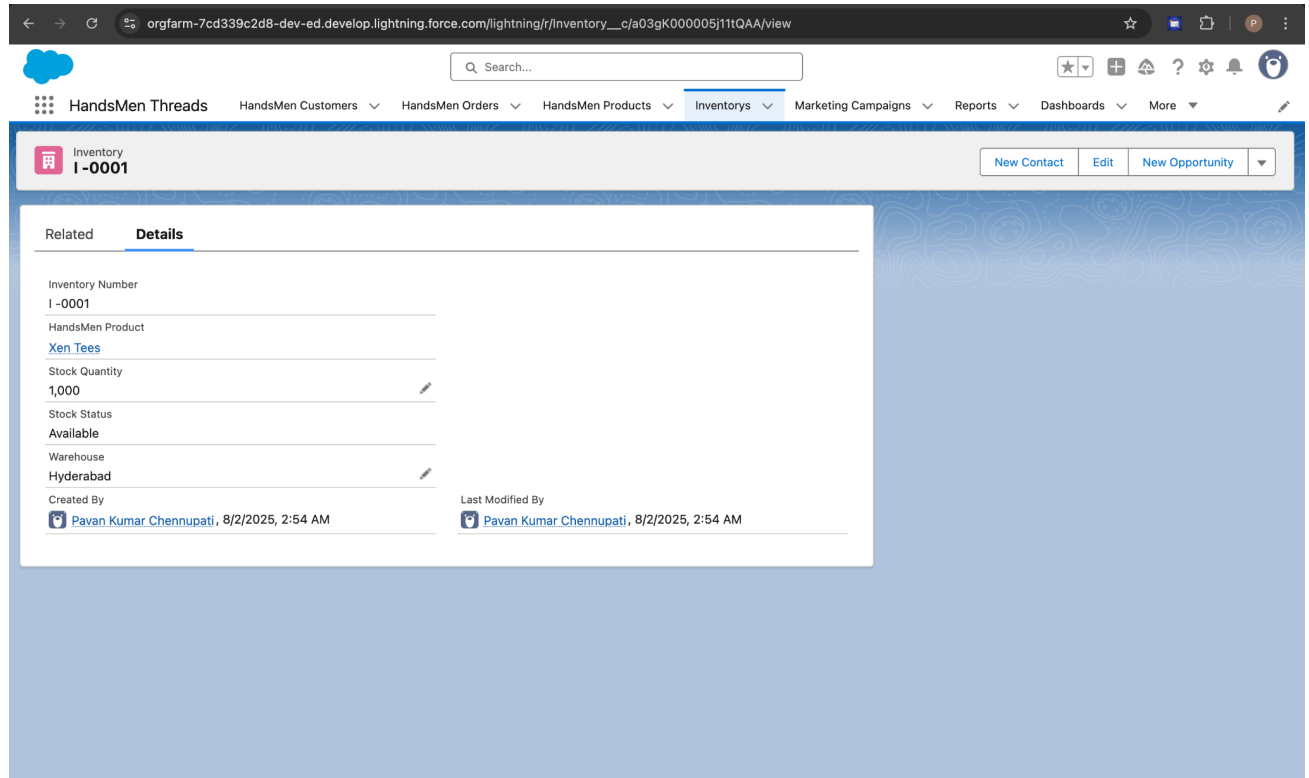
**Fig: New Order Creation Page**



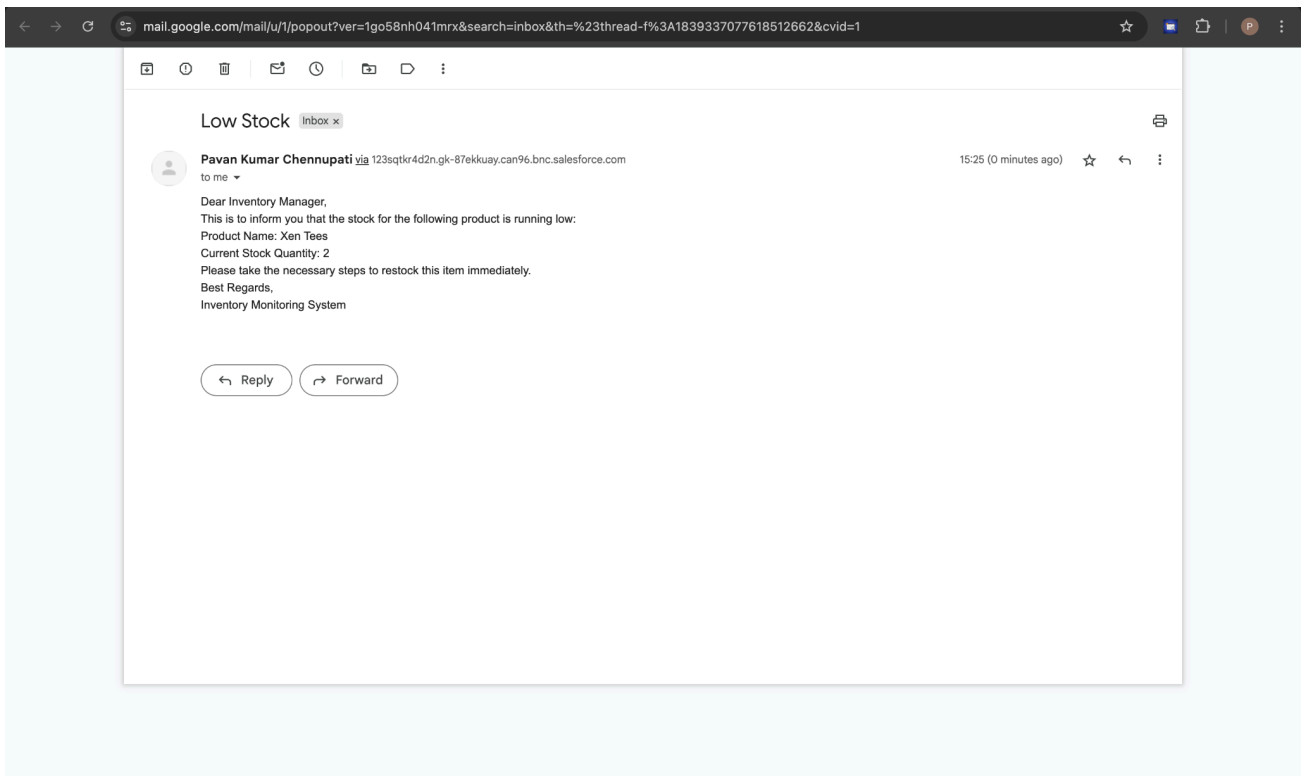
**Fig: Order Confirmation**



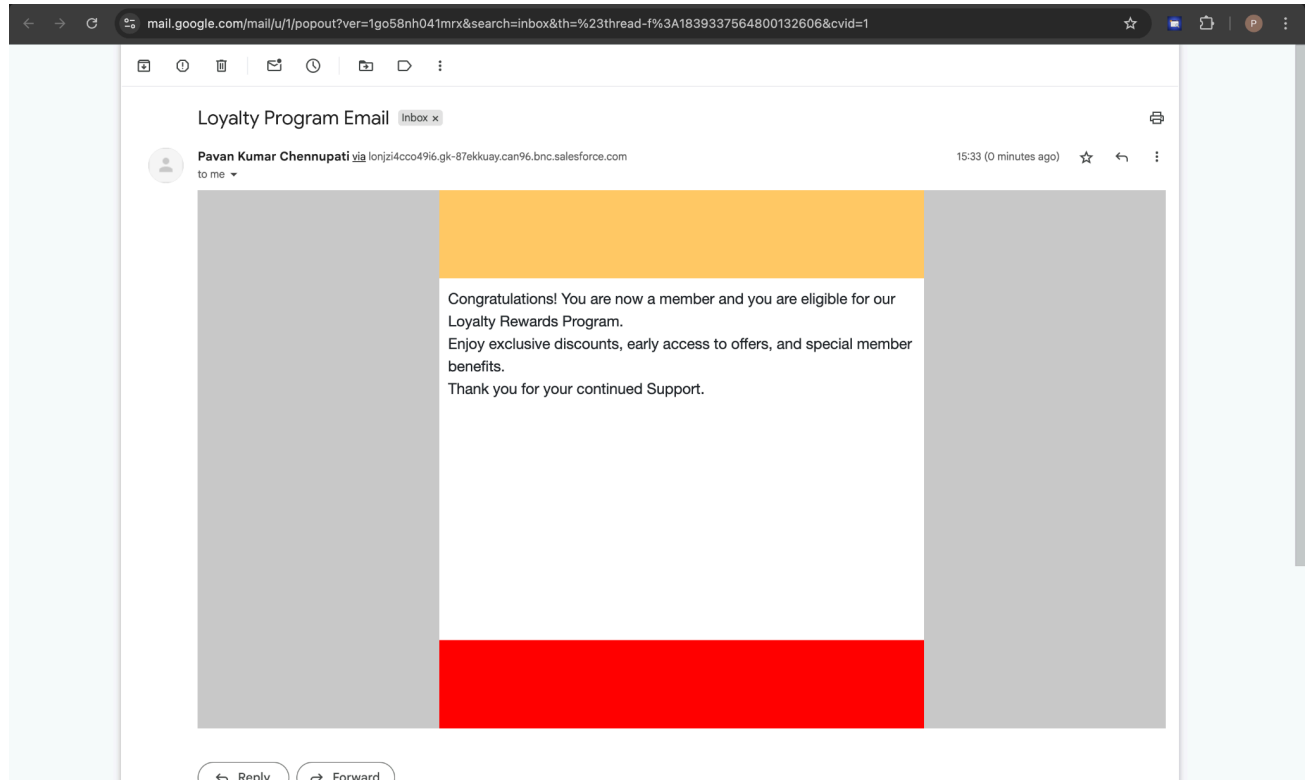
**Fig: Order Confirmation Email Sent to Customer**



**Fig: Inventory Creation**



**Fig: Low Stock Alert**



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

## **CONCLUSION**

The Salesforce CRM implemented for HandsMen Threads significantly enhances our operational capabilities. This system efficiently manages core business processes, cultivates robust customer relationships, and ensures exceptional data integrity across sales, inventory, and marketing functions. Leveraging Salesforce's advanced functionalities, including custom objects, automated workflows (flows), stringent data validation rules, timely notifications, and bespoke code (Apex), we have established a cohesive platform. This integration provides HandsMen Threads with immediate insights, facilitates informed decision-making, and establishes a strong foundation for future expansion and enhanced customer experiences.

## **FUTURE SCOPE**

Our continuous efforts aim to further enhance the HandsMen Threads CRM.

- **Customer Portal:** Envision a dedicated online portal providing customers with the ability to log in, review their order history, monitor loyalty points, update personal information, and access support independently.
- **Mobile App Development:** We are capable of developing a sophisticated mobile application for our in-store teams utilizing the Salesforce Mobile SDK. This application would facilitate inventory management, order processing, and customer information access directly from their mobile devices.
- **Advanced Reports & Dashboards:** We propose the creation of comprehensive sales and inventory dashboards within Salesforce. These visual tools would offer enhanced insights into performance, assist in identifying trends, and inform strategic decisions.
- **AI-Powered Recommendations (Salesforce Einstein):** Salesforce Einstein could be integrated to deliver personalized product recommendations to customers. These suggestions would be based on prior purchases or the preferences of similar customers, thereby significantly boosting sales.
- **Messaging Integration:** Integration with popular messaging applications such as WhatsApp or SMS would enable the dispatch of real-time order confirmations, shipping updates, loyalty program announcements, and personalized marketing messages directly to customers' mobile devices.