

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

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ABSTRACT

This document covers the process of developing a custom Salesforce CRM for HandsMen Threads, a leading men's fashion brand. The primary goal of the project was to streamline customer management, order processing, inventory optimization, and support marketing activities as the business grew. By leveraging the power of the Salesforce cloud platform, we successfully automated critical business processes, maintained data quality, and provided the entire team with real-time access to operational information. The solution we built included custom objects, intelligent automation flows, strict validation rules, scheduled email notifications, and custom Apex code, all designed to improve customer engagement, drive sales, prevent inventory issues, and provide comprehensive visibility into the business.

OBJECTIVE

Our primary mission was clear: build and implement a custom Salesforce CRM for HandsMen Threads to streamline daily operations and improve the customer experience. Specifically, our goals included:

- Automate routine tasks such as sending order confirmations, updating loyalty levels, and flagging low-stock alerts.
- Ensure incoming data is accurate and consistent through robust validation rules.
- Provide teams with quick access to inventory information, customer interactions, and sales performance.
- Improve collaboration and communication between sales, inventory, and marketing teams.

- Deliver a truly personalized experience to customers through automated messaging and loyalty programs.

TECHNOLOGY DESCRIPTION (Paraphrase)

- **Salesforce Platform**

Salesforce serves as our core system, a cloud-based CRM platform that manages all customer information. This platform provides a variety of tools for process automation, service improvement, marketing campaign optimization, and sales growth. We utilize easy-to-use drag-and-drop features as well as advanced development capabilities like Apex and Flow for more complex needs.

- **Custom Objects**

Custom objects function as specialized "data vaults" tailored to HandsMen Threads' needs, such as:

1. Customer__c: Stores complete customer information, including personal details, contact information, and loyalty status.
2. Product__c: Contains data for each product, from name, description, price, to stock quantity.
3. Order__c: Documents all customer orders, linking them to the customer and related products, along with the order date, total cost, and order quantity.
4. Marketing_Campaign__c: Used to record all marketing and promotional campaigns, facilitating analysis of their effectiveness.

- **Tabs**

Tabs serve as shortcuts that make it easier for teams to access data. We created a dedicated tab for each custom object (such as "Products" or "Orders") so teams can view, create, and manage data directly through the "HandsMen Threads" app.

- **Custom App**

We created a custom Lightning App called "HandsMen Threads." This app serves as the team's work center, combining various important tabs (Customer, Order, Product, Inventory, Campaign, Reports) in one place to streamline workflow.

- **Profiles & Roles**

This feature ensures data access and functionality are configured according to needs:

1. Profiles: Set user permissions, accessible objects, and screen displays. We created custom profiles, such as "HandsMen Sales Profile," to match roles.

2. Roles: Set data visibility based on organizational structure. For example, a "Sales Manager" can see all sales data, while a "Sales Representative" can only see their own data.

- **Permission Sets**

Permission Sets provide additional access without changing a user's primary profile. This makes it easier to grant specific access rights based on functional needs.

- **Validation Rules**

Validation rules maintain data quality and consistency. For example:

1. Emails must be formatted correctly (e.g., must contain "@gmail.com").
2. Orders should not be saved if they would negatively impact product inventory.

- **Email Templates & Alerts**

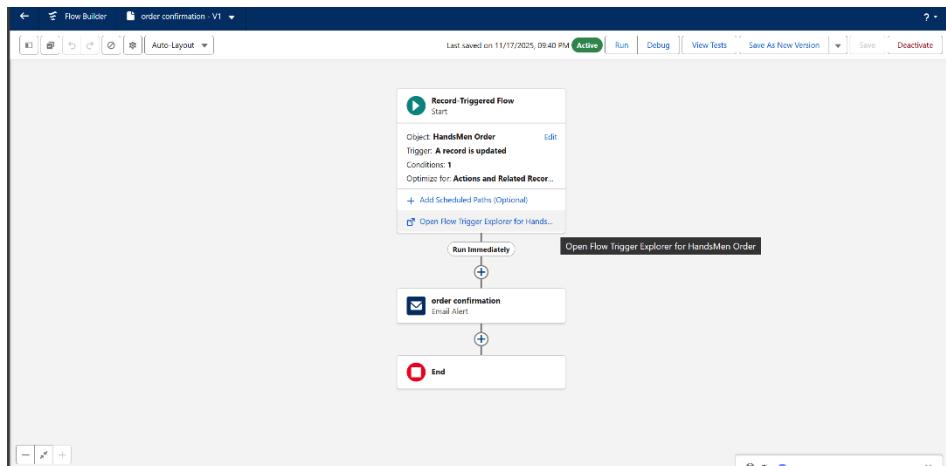
This tool ensures consistent, automated communication:

1. Email Templates: Professional email templates, such as order confirmations.
2. Email Alerts: Automatic notifications that activate based on specific conditions, such as new orders or changes in customer loyalty status.

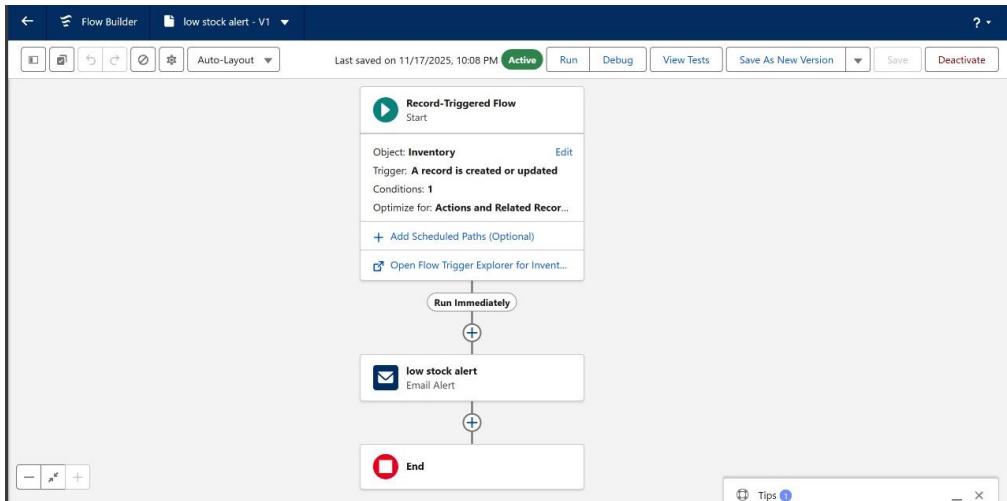
- **Flows**

Flow is a visual automation tool that makes it easy to create business logic without writing code. Key examples:

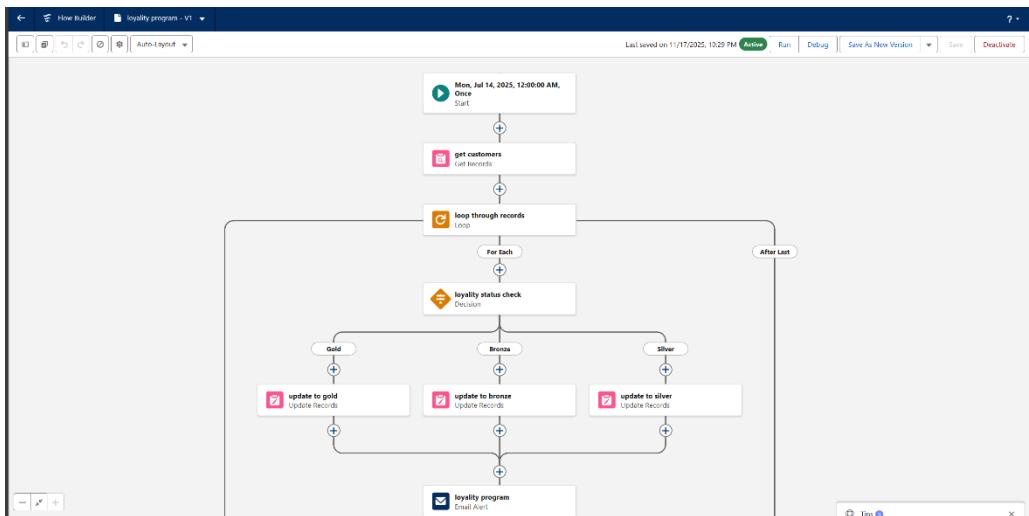
1. Email Notification Flow: Automatically sends order confirmation emails as soon as a new order is created.



2. Stock Update Flow: Every time an order is created or updated, this flow automatically adjusts the available product stock.



3. Scheduled Loyalty Update Flow: This scheduled flow runs daily (e.g., midnight) to check and update a customer's loyalty status based on their total purchase value.



- Apex

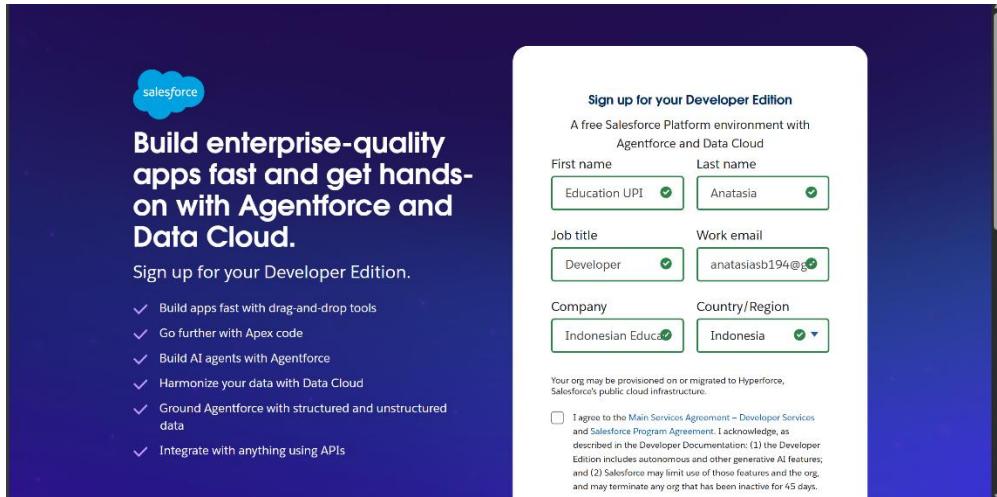
Apex is a programming language in Salesforce used when custom or complex business logic is needed that cannot be handled by standard features. Some of the Apex triggers we use are:

1. Order Total Trigger: Automatically calculates and updates the `Total_Amount__c` value on an order based on the quantity and unit price.
2. Stock Deduction Trigger: Ensures accurate product stock reduction after an order is confirmed. This trigger works in conjunction with validation rules to prevent overselling.
3. Loyalty Status Trigger: Updates the `Loyalty_Status__c` value in a customer's data directly based on their total purchase history.

DETAILED PROJECT EXECUTION

1. Salesforce Developer Org Setup

We start by creating a new Salesforce Developer Org at <https://developer.salesforce.com/signup> as the primary environment for all development activities.



2. Custom Object Creation

We structure the core data by creating custom objects with the necessary fields to store all critical business information:

- HandsMen Customer (Customer__c): Stores customer data such as Name, Email, Phone, Address, and Loyalty_Status__c
- HandsMen Product (Product__c): For product data, including Name, Description, Unit_Price__c, and Stock__c.
- HandsMen Order (Order__c): For recording customer orders, containing the Date, Quantity__c, Total_Amount__c, and the relationship to the Customer and Product.
- Marketing Campaign (Marketing_Campaign__c): Used to record promotional activities.

3. Custom Lightning App

We designed a custom Lightning App called “HandsMen Threads,” which combines all the important tabs (Customer, Order, Product, Inventory, Campaign, Reports) into one easy-to-use workspace for the team.

4. Validation Rules

Validation rules were created to maintain data quality, such as:

- Preventing Stock c from being less than zero.
- Ensuring the Email field for Customer must contain “@gmail.com.”

5. User Profiles & Roles

We set up appropriate profiles and roles to manage user access and data visibility:

- Profiles: We duplicated the “Standard User” to create custom profiles like “HandsMen Sales Profile.”
- Roles: We created hierarchies like “Sales Manager” and “Inventory Manager” to manage data access based on responsibilities.

6. User Creation

We create new users and assign them to their respective roles and profiles (e.g., Niklaus Mikaelson for Sales, Kol Mikaelson for Inventory) as an example of using a multi-user system.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Anatasia_EducationUPI	ana	anatasiaesh194903@apponforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Chatter_Export	chatty	b0d900000000y0uar.mnx4w8t0ry@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	EPIC_OnFarm	GEPIIC	epic.516c21c3c6cb@grdfarm.salesforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Mikaelson_Daniel	dmika	anatasiaesh159477@gmail.com	Marketing	<input checked="" type="checkbox"/>	Platform 1
<input type="checkbox"/>	Mikaelson_Kol	kmika	anatasiaesh25448@gmail.com	Inventory	<input type="checkbox"/>	Platform 1
<input type="checkbox"/>	Mikaelson_Niklaus	nmika	anatasiaesh78415@gmail.com	Sales	<input checked="" type="checkbox"/>	Platform 1
<input type="checkbox"/>	User_Integration	integ	integration@00d9000000eyvrluar.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User_Security	sec	insightssecurity@00dg000000ey0luar.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

7. Email Templates

Custom email templates are created to maintain consistent automated communications, such as "Order Confirmation" and "Loyalty Status Update."

8. Flow Implementations

- Email Notification Flow (Record-Triggered): Sends a confirmation email when a new order is created.
- Stock Update Flow (Record-Triggered): Automatically adjusts product stock every time an order is created or updated.
- Scheduled Loyalty Update Flow (Scheduled-Triggered): Runs a daily customer loyalty status update based on their total purchase.

9. Apex Triggers

- a. Order Total Trigger (OrderTrigger): Calculates and updates the total order value based on the quantity and unit price.
- b. Stock Deduction Trigger (ProductStockUpdateTrigger): Automatically reduces product stock after an order is saved.
- c. Loyalty Status Trigger (CustomerLoyaltyUpdateTrigger): Sets up real-time customer loyalty status updates based on accumulated purchases.

PROJECT DEMONSTRATION: A Real-World Example

To illustrate how the entire system works, here's an illustration of the process a customer goes through at HandsMen Threads:

1. Customer Registration
 - Suppose a new customer named "John Doe" comes into the store.
 - A sales representative opens the "HandsMen Customer" tab and selects "New."
 - They enter John's information: Name, Phone Number, and Email (e.g., "john.doe@gmail.com").
 - Validation Rule Function: If the representative types something incorrectly, such as "john.doe@yahoo.com," an error message appears asking for a valid Gmail email address.
 - Once the information is correct, John Doe is officially registered in the system.
2. Product Setup
 - Meanwhile, the inventory manager ensures all products are recorded correctly in the "HandsMen Product" tab.
 - For example, the "Men's Suit – Classic Blue" is listed for \$500 with an initial stock of 10 units.
3. Order Placement
 - John is interested and wants to purchase the suit.
 - The sales representative creates a new order in the "HandsMen Order" tab.
 - The order is linked to John, the product is selected, and the quantity is set to 1.
 - Apex Trigger Functional: When saved, OrderTotalTrigger automatically calculates the Total_Amount__c to \$500 without any manual input.
 - Email Notification Flow Functional: Within seconds, John receives an "Order Confirmation" email to his Gmail address.
4. Inventory Update
 - Stock Update Flow Function: After the order is saved, the stock of "Men's Suit - Classic Blue" automatically changes from 10 to 9.
 - Validation Rule Function: If a sales representative attempts to order 11 units when there are only 10 in stock, the system automatically rejects the order.

5. Loyalty Status Update

- Apex Trigger Function: When the order is completed and John's total purchase is updated, the CustomerLoyaltyUpdateTrigger recalculates his loyalty status. If the purchase amount exceeds a certain threshold, the status (e.g., to "Silver Member") is automatically updated.
- Scheduled Flow Function: The scheduled flow also performs daily checks to ensure loyalty status remains accurate.

DOCUMENTATION CAPSTONE (SCREENSHOOT)

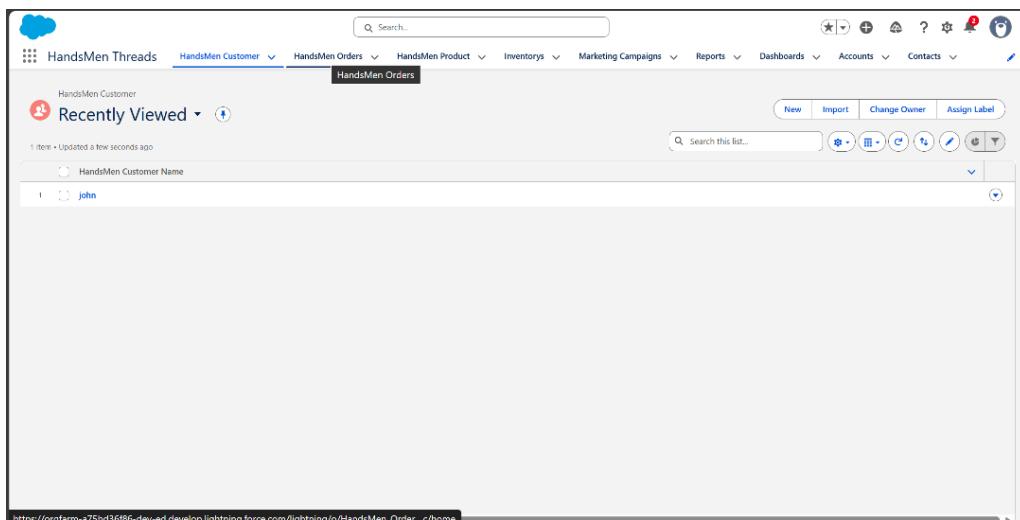


Fig: Custom App for HandsMen Threads

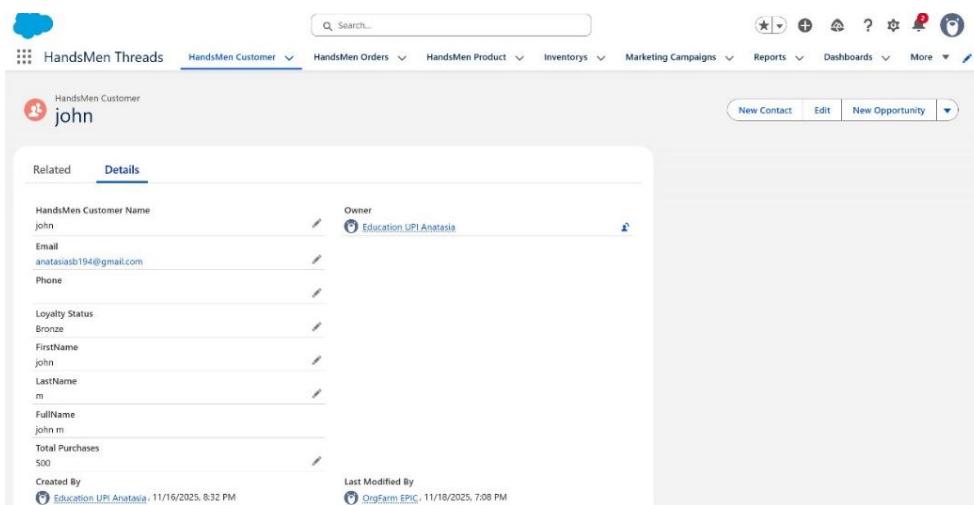


Fig: Customer Creation in HandsMen Threads

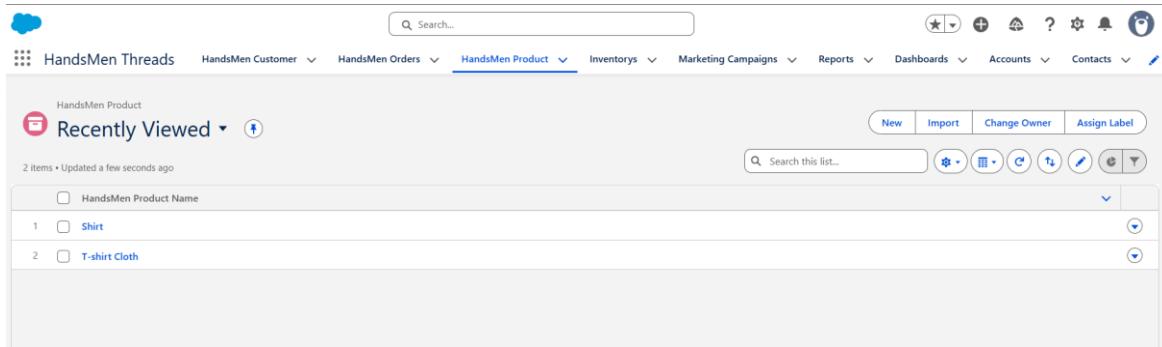


Fig: Product List View

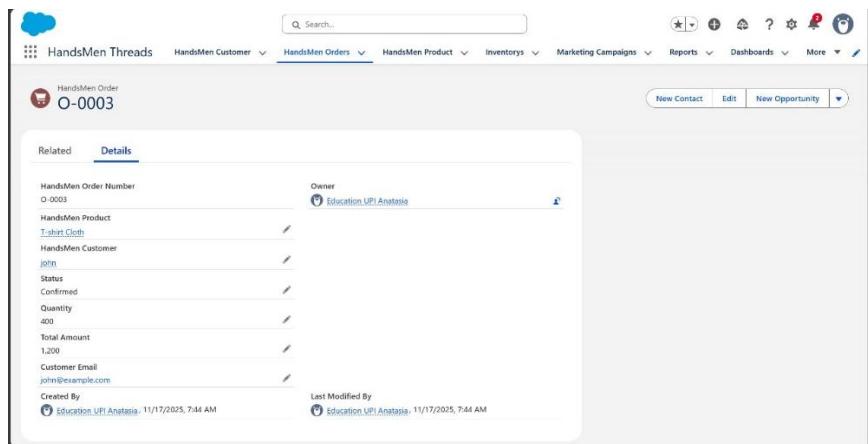


Fig: New Order Creation Page

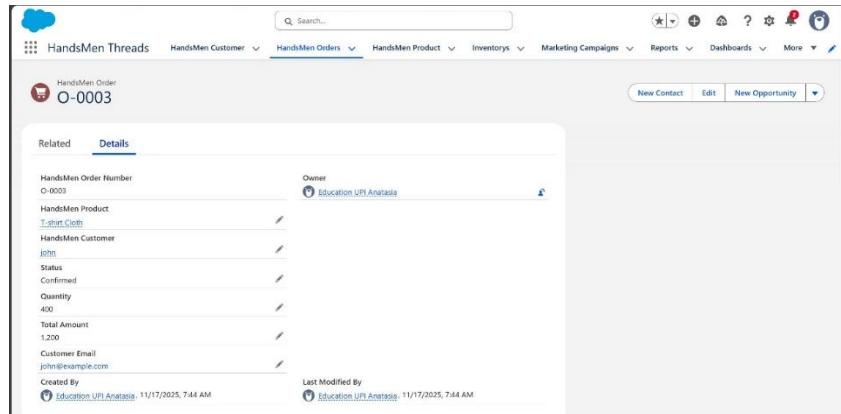


Fig: Order Confirmation

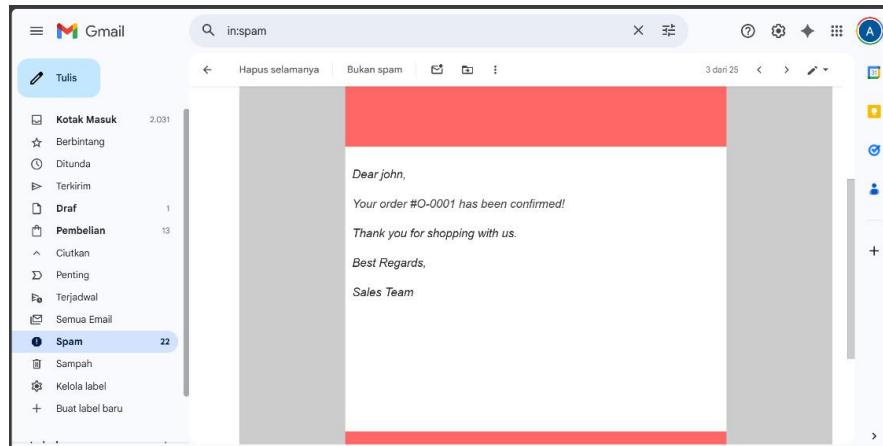


Fig: Order Confirmation Email Sent to Customer

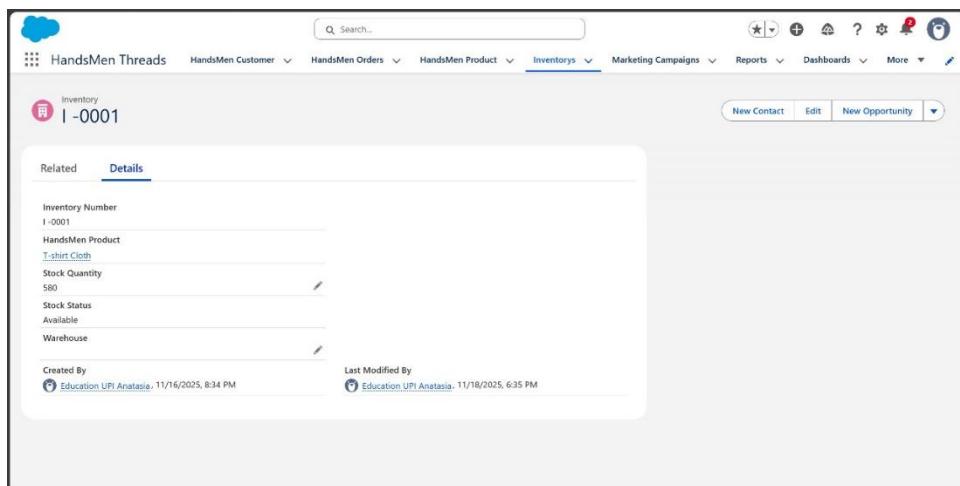


Fig: Inventory Creation

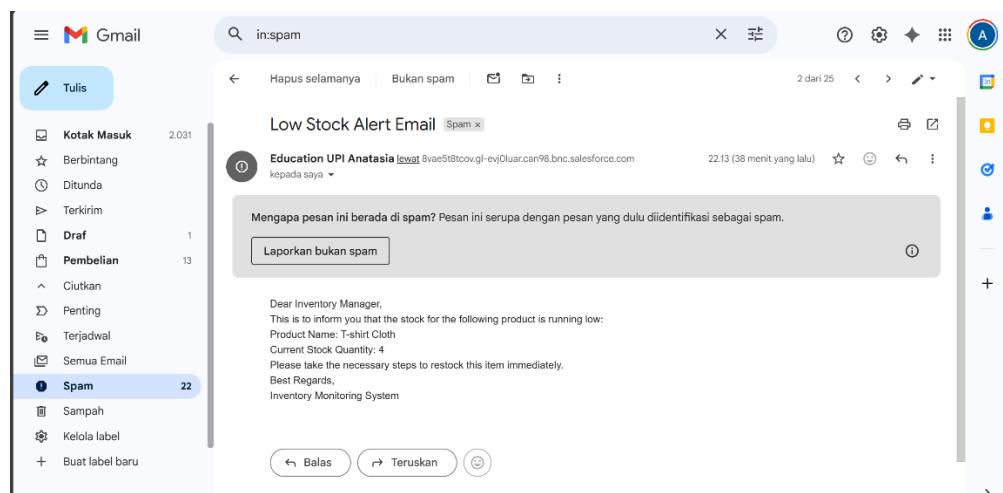


Fig: Low Stock Alert

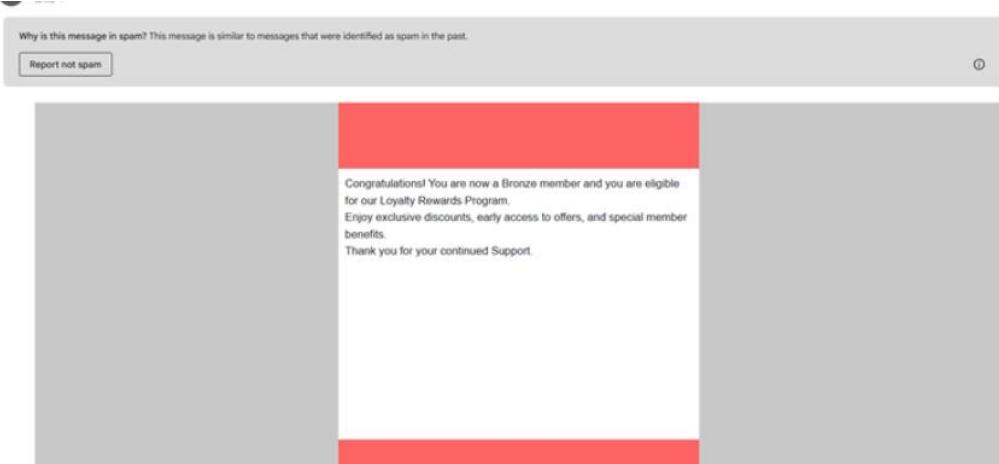


Fig: Customer Record Showing Updated Loyalty Status

CONCLUSION

The Salesforce CRM we built for HandsMen Threads has significantly transformed business operations. It streamlines the company's core processes, strengthens customer relationships, and maintains accurate data across sales, inventory, and marketing. Leveraging Salesforce's diverse capabilities, from custom objects and intelligent automation through flows, to robust validation rules and timely notifications, to our custom Apex-based code, we've created a unified platform. As a result, HandsMen Threads gains quick access to critical information, enables more informed decision-making, and provides a strong foundation for future expansion and enhanced customer experience.

FUTURE SCOPE

The development of this system doesn't stop there. There are a number of exciting enhancements that can be implemented to make HandsMen Threads CRM even more superior:

1. Customer Portal: Creation of a dedicated customer portal that allows customers to log in independently to view order history, monitor loyalty points, update personal information, and receive support without having to contact the team directly.
2. Mobile App Development: Development of a mobile app using the Salesforce Mobile SDK so that store teams can manage inventory, process orders, and access customer information directly from mobile devices.
3. Advanced Reports & Dashboards: Creation of advanced dashboards and reports in Salesforce to provide in-depth insights into sales and inventory, identify trends, and support strategic decision-making.

4. AI-Powered Recommendations (Salesforce Einstein): Integration with Salesforce Einstein to provide personalized product recommendations to customers based on their purchase history or alignment with the behavior of other customers.
5. Messaging Integration: Connect Salesforce with popular messaging channels like WhatsApp or SMS to send real-time notifications, such as order confirmations, shipping updates, loyalty information, and personalized marketing messages.