

HandsMen Threads: Elevating the Art of Sophistication in Men's Fashion - Salesforce CRM Project Report

1. Abstract

This report details the implementation of a Salesforce CRM solution for "HandsMen Threads," a premium men's fashion brand, aimed at revolutionizing their data management, enhancing customer relations, and optimizing operational efficiency. The project involved building a robust data model with custom objects, ensuring data integrity through UI-driven validations, and automating key business processes. Core functionalities include automated order confirmations, a dynamic loyalty program, proactive stock alerts, and scheduled bulk order updates. The solution leverages Salesforce's declarative tools like Lightning App Builder and Record-Triggered Flows, alongside programmatic capabilities using Apex and Apex Triggers for complex logic and asynchronous processing. This comprehensive implementation provides HandsMen Threads with a scalable and integrated platform to streamline operations, improve customer experience, and support informed decision-making.

2. Objective

The primary objectives of the "HandsMen Threads" Salesforce CRM project were to:

- **Streamline Data Management:** Establish a robust data model within Salesforce to store all pertinent business data, including customer, product, order, and inventory information, ensuring a seamless flow of information across the organization.
- **Enhance Customer Relations:** Improve customer engagement and loyalty through automated communication and personalized programs, such as automated order confirmations and a dynamic loyalty program.
- **Optimize Operational Efficiency:** Automate critical business processes, including inventory management and bulk order processing, to prevent stockouts, ensure timely updates, and reduce manual effort.
- **Ensure Data Integrity:** Maintain the accuracy and consistency of data directly from the user interface through validation rules and controlled data entry.
- **Leverage Salesforce Capabilities:** Utilize Salesforce CRM's powerful features, including custom objects, Lightning App Builder, Record-Triggered Flows, Scheduled Flows, and Apex/Apex Triggers, to deliver a tailored and scalable solution.

3. Technology Description

This project extensively utilized the Salesforce platform, a leading cloud-based CRM system, known for its powerful declarative and programmatic capabilities.

3.1 Salesforce Platform

Salesforce CRM provides a comprehensive suite of tools for managing customer relationships, sales, service, marketing, and analytics. Its metadata-driven architecture allows for rapid application development and customization. Key Salesforce components leveraged in this project include:

- **Custom Objects:** Custom database tables created to store information specific to HandsMen Threads unique business needs.
- **Standard Objects:** Utilization of standard Salesforce objects like Reports, Dashboards, Accounts, and Contacts for broader business needs.
- **Fields:** Custom fields were created on both standard and custom objects to capture specific data points (e.g., Loyalty Status, Current Stock Level).
- **Relationships:** Master-detail and lookup relationships were established between objects to define how data relates to one another (e.g., Orders related to Customers and Products).

3.2 Key Salesforce Features Implemented

- **Lightning App Builder:** Used to design and build intuitive and user-friendly interfaces, providing quick access to key information for HandsMen Threads employees.
- **Record-Triggered Flows:** Declarative automation tool used to implement complex business logic and automate processes based on record creation, update, or deletion. This was crucial for several key automations in the project.
- **Apex and Apex Triggers:** Salesforce's proprietary programming language (Apex) and triggers were utilized for custom business logic that could not be achieved declaratively. This ensures robust data validation and complex calculations.
- **Asynchronous Apex (Batch Apex & Scheduled Apex):** Employed for processing large volumes of data and scheduling tasks to run at specific intervals without impacting real-time user performance.
- **Email Alerts:** Configured to send automated notifications and confirmations to customers and internal teams.
- **Validation Rules:** Implemented to enforce data quality and consistency directly from the user interface.

4. Detailed Execution of Project Phases

The project followed a structured approach, moving from data modeling to process automation and advanced customizations.

4.1 Data Modeling and Custom Object Creation

- **Requirement Analysis:** Identified key entities for HandsMen Threads, including Customers, Products, Orders, Inventory, and Marketing Campaigns.

- **Custom Object Definition:** Created the following custom objects to store pertinent business data:
 - Handsmen_Customer__c (for customer-related data)
 - Handsmen_Order__c (for managing orders)
 - Handsmen_Product__c (for product catalog)
 - Inventory__c (for tracking stock levels)
 - Marketing_Campaign__c (for promotional purposes)
- **Field Creation & Relationships:** Defined custom fields (e.g., Loyalty, Total Purchases for Customer; SKU, Price, Quantity for Product; Status, Quantity for Order) and established relationships between objects to ensure data connectivity.

4.2 User Interface Development (Lightning App Builder)

- **Custom Lightning App:** Designed the 'HandsMen Threads Sales App' using the Lightning App Builder to provide an intuitive and efficient user experience.
- **Record Page Layouts:** Customized record pages for Customer, Product, Order, and Inventory objects to display relevant information and related lists, providing a 360-degree view of data.

4.3 Data Quality Implementation

- **Validation Rules:** Implemented a validation rule on the Handsmen_Customer__c object to ensure users input professional email addresses, preventing generic email domains like '@gmail.com'. This maintains data integrity at the point of entry.

5. Project Explanation: Key Features & Automation

This section details the core functionalities implemented, showcasing how Salesforce addresses HandsMen Threads' business needs.

5.1 Record Creation Process

- **Handsmen Customer Object:** Demonstrated the creation of a new Handsmen_Customer__c record, including fields like Name, Email, First Name, Last Name. Highlighted the automated nature of 'Loyalty' and 'Total Purchases' fields, managed by Flows.

The screenshot shows a Salesforce interface for creating a new HandsMen Customer. The form is titled "New HandsMen Customer" and includes a search bar at the top. Below the title, there is a section for "Information" with fields for "HandsMen Customer Name" (containing "jkr"), "Email", "Phone", and "Loyalty Status" (set to "--None--"). The "Owner" field shows "sai nikhila reddy". At the bottom, there are buttons for "Cancel", "Save & New", and "Save". A sidebar on the left shows "HandsMen Customers" and "Recently Viewed" items.

Fig: Customer record creation form

The screenshot shows the Salesforce interface for a newly created HandsMen Customer record. The record is titled "HandsMen Customer" with the ID "hs". A green message bar at the top says "HandsMen Customer "hs" was created." Below the title, there is a "Details" section with fields for "HandsMen Customer Name" (hs), "Email", "Phone", "Loyalty Status", "Order", "FirstName", and "LastName". The "Owner" field shows "sai nikhila reddy". A sidebar on the left shows "HandsMen Customers" and "Recently Viewed" items.

Fig: Successfully created customer record with a professional email.

- **Handsmen Product Object:** Demonstrated creation of a new Handsmen_Product__c record with details such as Name, SKU, Price, and Quantity.

HandsMen Thread

HandsMen Products

Recently Viewed

1 item • Updated a few seconds ago

HandsMen Product

1 cloth

New HandsMen Product

* = Required Information

Information

HandsMen Product Name hrk

Owner sai nikhila reddy

SKU

Price

Stock Quantity

Cancel Save & New Save

Fig: Product record creation form.

HandsMen Threads HandsMen Customers HandsMen Orders HandsMen Products Reports Dashboards Accounts Contacts More

HandsMen Product hrk

HandsMen Product "hrk" was created.

New Contact Edit New Opportunity

Related Details

HandsMen Product Name hrk

Owner sai nikhila reddy

SKU

Price

Stock Quantity

Created By sai nikhila reddy, 7/30/2025, 2:03 PM

Last Modified By sai nikhila reddy, 7/30/2025, 2:03 PM

Fig: Successfully created product record.

- **Inventory Object:** Showcased how to add a product to inventory, linking it to a specific product and warehouse, along with current stock.

The screenshot shows the 'New Inventory' form in a Salesforce environment. The form is a modal window with the title 'New Inventory'. It contains the following fields:

- Inventory Number:** A text input field.
- *HandsMen Product:** A dropdown menu with a search bar and a magnifying glass icon.
- Stock Quantity:** A text input field.
- Warehouse:** A text input field.

At the bottom of the form, there are three buttons: 'Cancel', 'Save & New', and 'Save'. The background shows the Salesforce interface with a sidebar containing 'HandsMen Threads', 'HandsMen Customers', 'HandsMen Orders', 'HandsMen Products', 'Inventories', 'Marketing Campaigns', 'Reports', 'Dashboards', 'Accounts', and 'Contacts'. A table titled 'Recently Viewed' is visible on the left, showing two items with 'Inventory Number' and checkboxes.

Fig : Inventory record creation form.

The screenshot shows the 'Inventory Details' page in a Salesforce environment. The page displays the details of a newly created inventory record with ID 'I-0002'. The details are as follows:

- Inventory Name:** I-0002
- Product:** cloth
- Stock Quantity:** (field with a pencil icon for editing)
- Stock Status:** Low Stock
- Warehouse:** (field with a pencil icon for editing)
- Created By:** sai nikhila reddy, 7/30/2025, 2:05 PM
- Last Modified By:** sai nikhila reddy, 7/30/2025, 2:05 PM

A green notification banner at the top of the page states: 'Inventory "I-0002" was created.' The background shows the Salesforce interface with a sidebar containing 'HandsMen Threads', 'HandsMen Customers', 'HandsMen Orders', 'HandsMen Products', 'Reports', 'Dashboards', 'Inventories', and 'More'.

Fig : Successfully created inventory record.

- **Handsmen Order Object:** Illustrated the creation of a Handsmen_Order__c record, specifying Status, Quantity, and the associated customer's email. Mentioned the 'Total Amount' calculation.

Information

HandsMen Order Name

Owner
sai nikhila reddy

Customer
jk

Status
--None--

Quantity

Total Amount

Cancel Save & New Save

* = Required Information

Fig : Order record creation form.

5.2 Automated Business Processes (Salesforce Flows & Apex)

- **Automated Order Confirmations:**

- **Functionality:** Upon a change in Handsmen_Order__c status from 'Pending' to 'Confirmed', an automated confirmation email is sent to the customer. Inventory quantity is also updated.
- Changing an order's status to 'Confirmed', showing the confirmation email and verifying stock level reduction.

HandsMen Order O-0002

HandsMen Order "O-0002" was created.

Related Details

HandsMen Order Name
O-0002

Owner
sai nikhila reddy

Customer
jk

Status

Quantity

Total Amount

Created By
sai nikhila reddy, 7/30/2025, 2:07 PM

Last Modified By
sai nikhila reddy, 7/30/2025, 2:07 PM

Fig : Order record before status change.

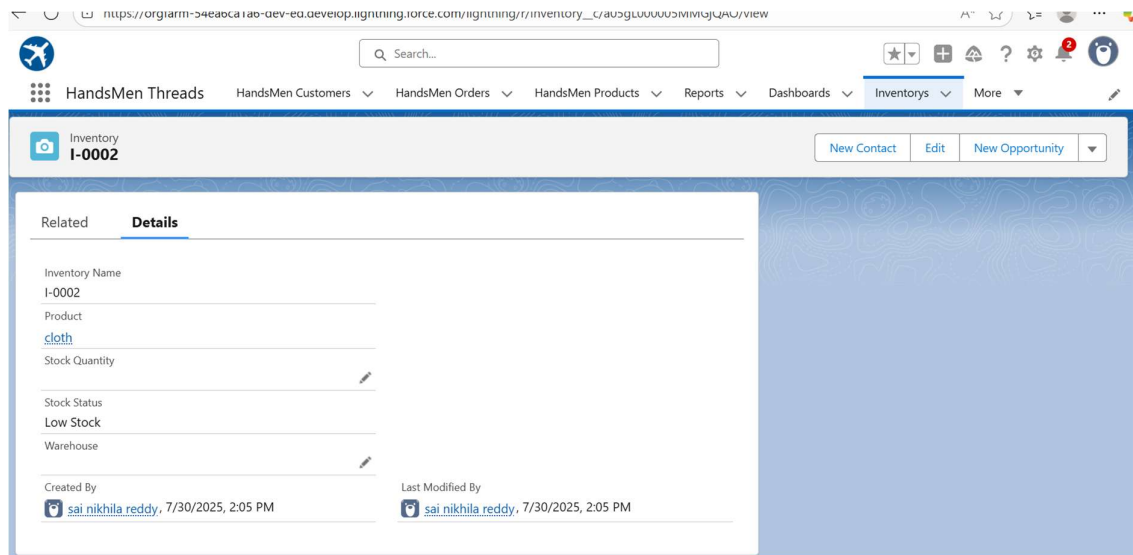


Fig : Inventory record showing reduced stock quantity after order confirmation.

- **Proactive Stock Alerts:**

- **Functionality:** When a product's 'Current Stock Level' drops below five units, an automated email notification is sent to the warehouse team, prompting a reorder.
- Modifying a Handsmen_Product__c record's 'Quantity' to below the threshold (e.g., 3 units).

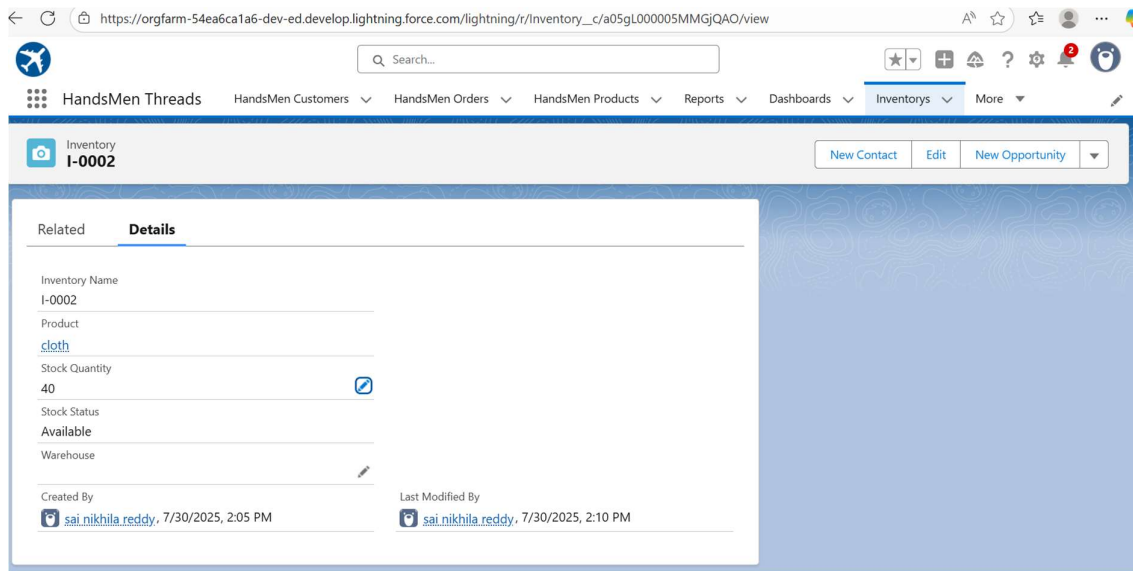


Fig : Product record showing initial stock level.

- **Dynamic Loyalty Program:**

- **Functionality:** Handsmen_Customer__c 'Loyalty Status' (Bronze, Silver, Gold) is dynamically updated based on their 'Total Purchases' value. An email is sent after the status change.
- Updating a customer's total purchases (e.g., by adding or modifying orders) to cross a loyalty threshold. Then, refreshing the customer record to show the updated loyalty status.

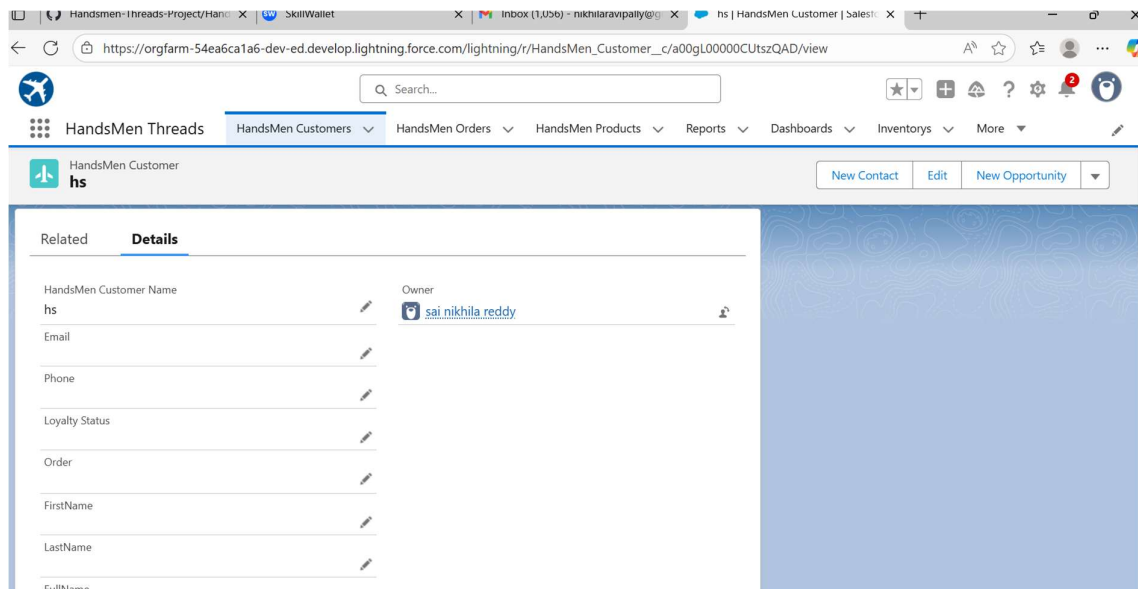


Fig : Customer record showing initial Null loyalty status.

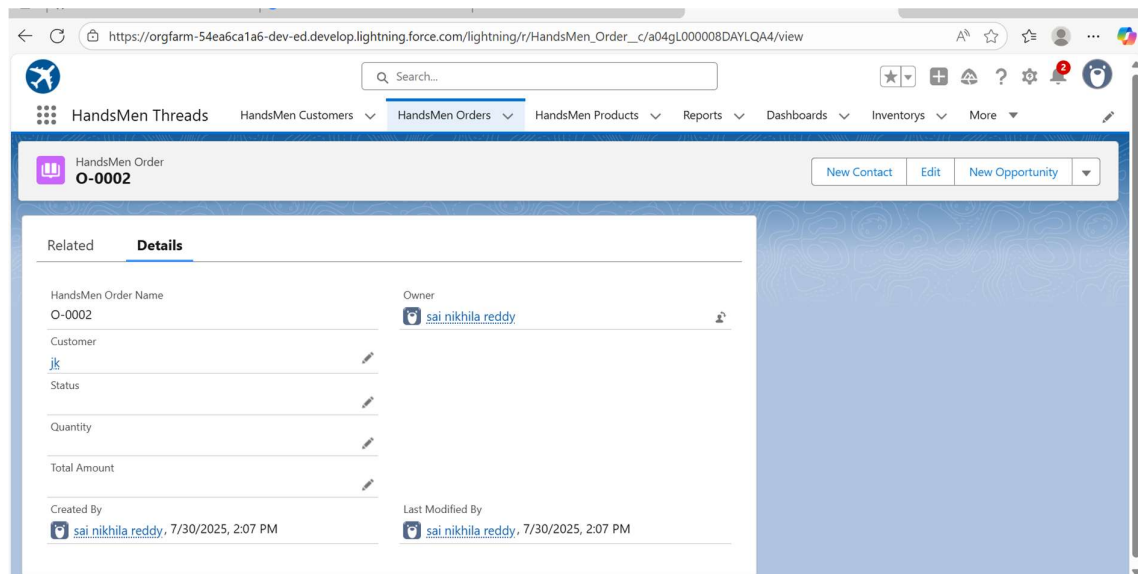


Fig : Customer's related list of orders after modifying orders.

- **Scheduled Bulk Order Updates (Asynchronous Apex):**

- **Functionality:** A scheduled Apex batch job runs daily at midnight to process bulk orders, updating financial records, and adjusting inventory.
- The 'Apex Jobs' page in Salesforce Setup which performs the scheduling and execution of the batch job.

Action	Submitted Date	Job Type	Status	Status Detail	Total Batches	Batches Processed	Failures	Submitted By	Completion Date	Apex Class	Apex Method	Apex Job ID
	7/29/2025, 12:02 AM	Batch Apex	Failed	First error: sObject type "Product__c" is not supported. If you are attempting to use a custom object, be sure to append the "__c" after the entity name. Please reference your WSDL or the describe call for the appropriate names.	0	1	1	Katukam, Sateesh	7/29/2025, 12:02 AM	InventoryBatchJob		707gK000009uuaB
	7/28/2025, 12:02 AM	Batch Apex	Failed	First error: sObject type "Product__c" is not supported. If you are attempting to use a custom object, be sure to append the "__c" after the entity name. Please reference your WSDL or the describe call for the appropriate names.	0	1	1	Katukam, Sateesh	7/28/2025, 12:02 AM	InventoryBatchJob		707gK000009cmMC
	7/27/2025, 12:01 AM	Batch Apex	Failed	First error: sObject type "Product__c" is not supported. If you are attempting to use a custom object, be sure to append the "__c" after the entity name. Please reference your WSDL or the describe call for the appropriate names.	0	1	1	Katukam, Sateesh	7/27/2025, 12:01 AM	InventoryBatchJob		707gK000009uJ5o
	7/26/2025, 1:43 AM	Scheduled Apex	Queued		0	0	0	Katukam, Sateesh		InventoryBatchJob		707gK000009g9H4

Fig : Scheduled batch jobs in Salesforce Setup -> Apex Jobs page.

- **Apex and Apex Triggers:**

- **Functionality:** Apex code and triggers were used for complex calculations, specifically mentioned for calculating the 'Total Amount' on the Handsmen_Order__c object, derived from product price and quantity.

6. Conclusion

This Salesforce CRM project for "HandsMen Threads" successfully implemented a robust and integrated solution, addressing critical business challenges in data management, customer relations, and operational efficiency. By leveraging Salesforce's powerful capabilities – from declarative tools like Lightning App Builder and Record-Triggered Flows to programmatic solutions with Apex and Asynchronous Apex – the project delivered automated processes for order confirmations, loyalty programs, stock alerts, and bulk order processing. This has significantly streamlined operations, enhanced the customer experience, and provided a scalable foundation for future growth.

7. Future Scope

The Salesforce CRM solution for HandsMen Threads can be further enhanced with the following future developments:

- **Integration with E-commerce Platform:** Connect Salesforce directly with HandsMen Threads' e-commerce website for real-time order synchronization, customer data updates, and inventory management.
- **Marketing Cloud Integration:** Implement Salesforce Marketing Cloud for advanced segmentation, personalized email campaigns, social media marketing, and customer journey automation.
- **Service Cloud Implementation:** Enhance customer service capabilities with Service Cloud for case management, knowledge base, and live chat support.
- **Advanced Analytics & Reporting:** Develop more sophisticated dashboards and reports using Salesforce Analytics Cloud (CRM Analytics) for deeper insights into sales trends, customer behavior, and inventory performance.
- **Mobile App Development:** Create a Salesforce Mobile App for sales representatives and warehouse staff to manage orders and inventory on-the-go.