

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.

TECHNOLOGY DESCRIPTION

Salesforce

Salesforce is a cloud-based Customer Relationship Management (CRM) platform that helps businesses manage customer data, automate processes, and improve service, marketing, and sales operations. It provides point-and-click tools as well as programmatic capabilities (like Apex and Flows) to build custom business solutions.

Custom Objects

Objects in Salesforce are like tables in a database. Custom Objects are created to store specific data.

Example:

- Customer__c – Stores customer info
- Product__c – Stores product details
- Order__c – Stores orders

Tabs

Tabs are used to display object data in the Salesforce UI.

Example: A tab for Product__c allows users to easily view and manage products.

Custom App

An App in Salesforce is a collection of tabs grouped together for a specific business purpose.

Profiles

Profiles define what a user can see, do, and edit in Salesforce. It controls object permissions, field access, and more.

Roles

Roles control the data visibility in Salesforce's role hierarchy. It's used for sharing settings and reporting.

Permission Sets

Permission Sets grant additional permissions to users without changing their profile.

Validation Rules

Validation Rules ensure that the data entered by users meets specific business criteria.

Examples:

- The email address must contain "@gmail.com".
- Stock value cannot be negative.

Email Templates

Email templates are predefined formats used for sending emails to customers or users.

Example:

- An "Order Confirmation" email template.

Email Alerts

Email Alerts are actions defined in Flows or Workflow Rules that send emails using the predefined templates.

Example:

- When a customer's loyalty level changes, an email alert is automatically sent to notify them.

Flows

Flows automate business logic without requiring code. They can perform tasks like creating records, updating fields, or sending notifications.

Example:

- A flow is used to trigger an email alert when a new order is created.

Apex

Apex is Salesforce's object-oriented programming language, used to implement custom business logic and automation through code.

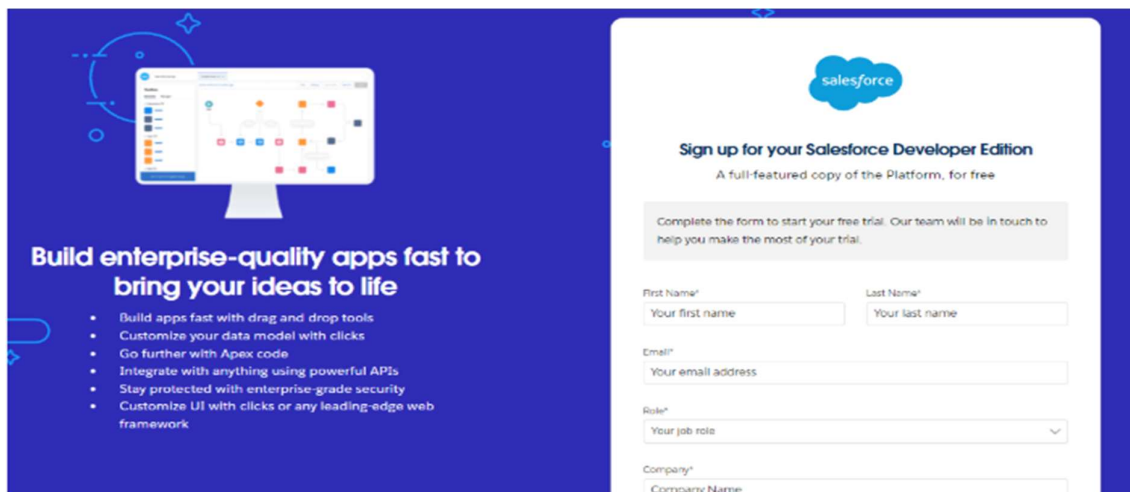
Example Triggers:

- Updating the Total_Amount__c field in order records.
- Reducing the inventory stock quantity after a purchase.

DETAILED EXECUTION OF PROJECT PHASES

1. Developer Org Setup

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



2. Custom Object Creation

Five custom objects were created to store business-critical data in the CRM system:

- **HandsMen Customer** – Stores customer information such as email, phone number, and loyalty status.
- **HandsMen Product** – Maintains product catalog details including SKU, price, and stock levels.
- **HandsMen Order** – Captures customer order data, including quantity and status.
- **Inventory** – Tracks stock quantities and warehouse locations.
- **Marketing Campaign** – Stores information related to promotional campaigns and scheduling.

Steps followed to create the objects:

- Navigated to **Setup → Object Manager → Create → Custom Object**.
- Provided the label, name, and enabled reporting and search features.
- Saved and created corresponding **Tabs** for each object.

3. Creating the Lightning App

A custom Lightning App named **HandsMen Threads** was created to manage all related business operations from a single interface.

- The app included the following tabs: **HandsMen Customer, Order, Product, Inventory, Campaign, Reports**, and more.
- This app was then assigned to the **System Administrator** profile for access.

4. Validation Rules

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

- **Order Object:** Prevents record saving if $\text{Total_Amount_c} \leq 0$.
Error Message: *"Please Enter Correct Amount"*
- **Customer Object:** Ensures the entered email address contains @gmail.com.
Error Message: *"Please fill Correct Gmail"*

5. User Role & Profile Setup

- The **Standard User** profile was cloned to create a new profile named **Platform 1**, and necessary access to custom objects was added to it.

- Roles were also created for different departments to ensure proper data access and visibility.

These roles included:

- **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.

7. Email Templates & Alerts

Three email templates were created for automated communication:

- **Order Confirmation** – This template is triggered when an order's status is updated to *Confirmed*.
- **Low Stock Alert** – This template is triggered when inventory falls below 5 units.

- **Loyalty Program Email** – This email is sent when a customer's loyalty status changes.

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

8. Flow Implementations

a. Order Confirmation Flow

- This flow is triggered when an order record is updated to a status of *Confirmed*.
- It sends an **Order Confirmation Email** to the respective customer.

b. Stock Alert Flow

- This flow is triggered when the **inventory stock quantity** falls below 5 units.
- It sends a **Low Stock Alert** email to the **Inventory Manager**.

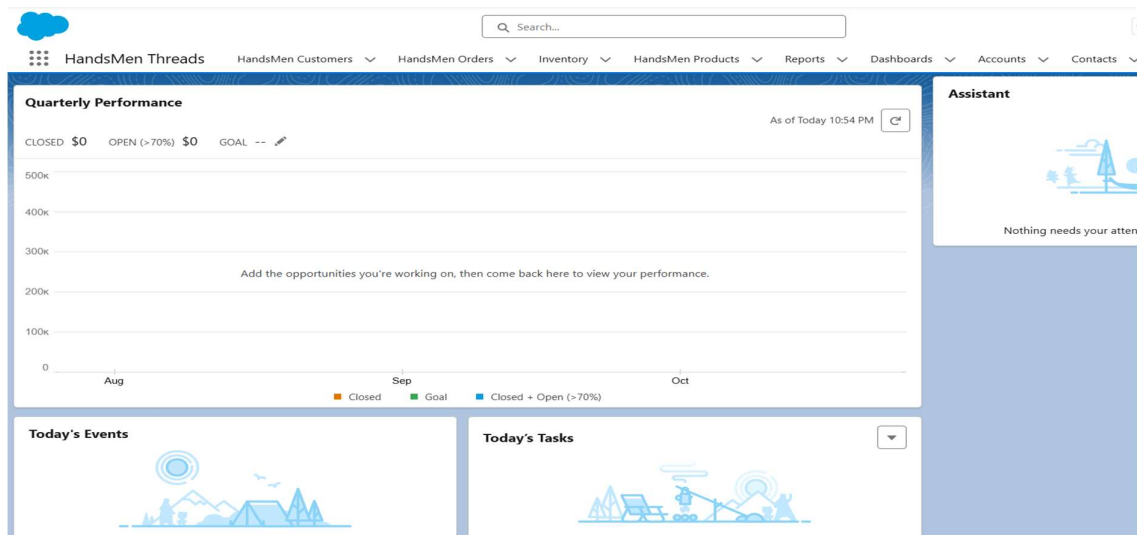
c. Scheduled Flow: Loyalty Update

- This flow runs **daily at midnight**.
- It loops through the customer records and updates the **Loyalty Status** field based on each customer's total purchase amount.

9. Apex Triggers


The following Apex triggers were developed to handle custom automation:

- **Order Total Trigger:** Automatically calculates the Total_Amount__c field based on the quantity and unit price of the order.
- **Stock Deduction Trigger:** Automatically reduces the inventory count when a new order is placed.
- **Loyalty Status Trigger:** Updates the customer's loyalty status based on their total purchases.



The screenshot shows the 'HandsMen Customers' list view. At the top, there is a search bar and a navigation menu with options: HandsMen Threads, HandsMen Customers, HandsMen Orders, Inventory, HandsMen Products, Reports, Dashboards, Accounts, Contacts, Home, and X. The main section is titled 'HandsMen Customers' and 'Recently Viewed'. It shows a table with 2 items, updated a few seconds ago. The table has columns for 'HandsMen Customer Name' and a dropdown menu. The table contains two rows: 1. Sai Teja and 2. John. Above the table, there are buttons for 'New', 'Import', 'Change Owner', and 'Assign Label'. Below the table, there is a search bar and a set of icons for filtering and sorting.

	HandsMen Customer Name	
1	Sai Teja	
2	John	



HandsMen Threads

HandsMen Customers
HandsMen Orders
Inventory
HandsMen Products
Reports
Dashboards
Accounts
Contacts
Home


HandsMen Orders

Recently Viewed

New
Import
Change Owner
Assign Label

7 items • Updated a few seconds ago

	HandsMen Order Name	
1	<input type="checkbox"/> O-0011	
2	<input type="checkbox"/> O-0003	
3	<input type="checkbox"/> O-0004	
4	<input type="checkbox"/> O-0010	
5	<input type="checkbox"/> O-0002	
6	<input type="checkbox"/> O-0006	
7	<input type="checkbox"/> O-0001	



HandsMen Threads

HandsMen Customers
HandsMen Orders
Inventory
HandsMen Products
Reports
Dashboards
Accounts
Contacts
Home

HandsMen Products

Recently Viewed

New
Import
Change Owner
Assign Label

2 items • Updated a few seconds ago

	HandsMen Product Name	
1	<input type="checkbox"/> T-shirt cloth	
2	<input type="checkbox"/> T-shirt cloth	

Sai Teja Ravi saitejaravi723@gmail.com via o5ljq1cc0mpr.gk-6lopjuay.can96.bnc.salesforce.com
to saitejaravi723@gmail.com, me

Wed, Jul 16, 7:57 PM (10 days ago)

Dear ,

Your order #O-0011 has been confirmed!

Thank you for shopping with us.

Best Regards,

Sales Team

<p>Dear Inventory Manager,</p>

<p>The stock for product INV-0001 is running low.</p>

<p>Current Quantity: 4</p>

<p>Please restock as soon as possible to avoid shortages.</p>

<p>Regards,
Inventory System</p>

<p>Dear john,</p>

<p>We're excited to let you know that your loyalty status has been updated to Bronze.</p>

<p>Thank you for being a valued customer of HandsMen Threads.</p>

<p>Enjoy exclusive offers and rewards available to our Bronze members.</p>

<p>Warm regards,
HandsMen Threads Team</p>