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

ABSTRACT

This project showcases the development of a customized Salesforce CRM solution for **HandsMen Threads**, a premium men's fashion and tailoring brand. The primary goal was to streamline internal operations, enhance customer engagement, and strengthen data integrity across all business units.

A comprehensive data model was created featuring five essential custom objects: **Customer, Order, Product, Inventory, and Marketing Campaign**. Key business processes were automated through **Record-Triggered Flows, Scheduled Flows, Email Alerts, and Apex**, enabling efficient handling of order confirmations, loyalty status updates, and proactive stock monitoring.

To maintain accurate and reliable information, **validation rules** were applied, and a **role-based security model** was implemented to properly manage access for the Sales, Inventory, and Marketing teams. Additionally, a scheduled Apex batch job was developed to automatically update low-stock quantities.

This end-to-end CRM implementation elevates customer experience through personalized communication, boosts operational efficiency through automation, and establishes a scalable foundation for future growth on the Salesforce Platform.

OBJECTTIVES

The primary goal of this project is to design and implement a customized Salesforce CRM solution for **HandsMen Threads** that streamlines essential business operations, reinforces data accuracy, and enhances overall customer satisfaction. By establishing a centralized platform to manage customers, orders, products, inventory, and marketing campaigns, the project aims to:

- **Automate critical processes** such as order confirmations, loyalty status updates, and low-stock alerts.
- **Ensure reliable and consistent data** through well-defined validation rules.
- **Provide real-time visibility** into inventory levels and customer activity.
- **Strengthen team collaboration** with a role-based access and security structure.
- **Enhance customer engagement** through personalized communication and loyalty initiatives.

TECHNOLOGY DESCRIPTION

Salesforce

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

Custom Objects

Objects in Salesforce function like tables in a database. **Custom Objects** are created to store business-specific information.

Examples:

- **Customer__c** – Stores customer information
- **Product__c** – Stores product details
- **Order__c** – Stores order records

Tabs

Tabs are used to display and access object data in the Salesforce UI.
Example: A tab for **Product__c** allows users to view, create, and manage product records easily.

Custom App

A **Custom App** is a group of tabs packaged together for a specific business purpose or workflow, making navigation more organized for users.

Profiles

Profiles determine what a user can **see**, **access**, and **modify** in Salesforce. They control permissions such as object access, field visibility, and system capabilities.

Roles

Roles define **data visibility** within the organization's role hierarchy. They are used for sharing settings and reporting structures.

Permission Sets

Permission Sets provide **additional access** to users without changing their profile. They are used to grant extra permissions on top of the user's default profile.

Validation Rules

Validation Rules ensure that data entered meets business standards or requirements.

Examples:

- Email must contain **@gmail.com**
- Stock quantity **cannot be negative**

Email Templates

Predefined email formats used to send consistent and professional messages.

Example:

- "Order Confirmation" template for notifying customers of successful purchases.

Email Alerts

Email Alerts are automated actions triggered by Flows or Workflow Rules that send emails using predefined templates.

Example:

- When a customer's loyalty level changes, an email notification is sent automatically.

Flows

Flows automate business logic without requiring code. They can create records, update fields, trigger notifications, and more.

Example:

- A Flow that sends an order confirmation email whenever a new order is created.

Apex

Apex is Salesforce's object-oriented programming language used to create advanced custom logic beyond what configuration can achieve.
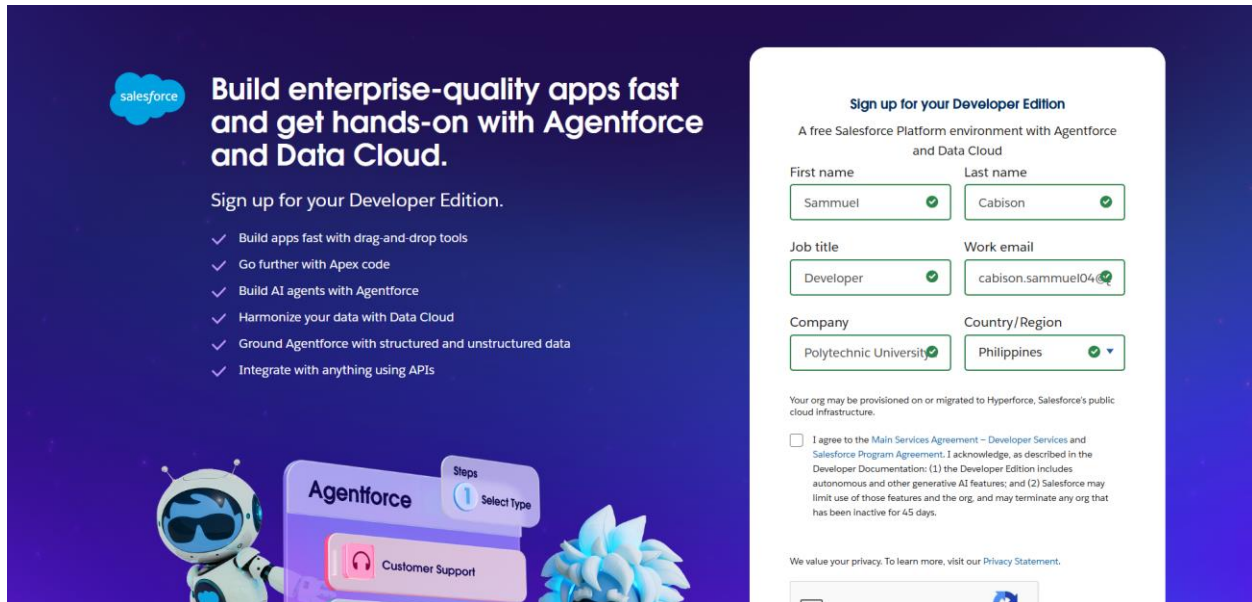
Examples:

- Automatically update **Total_Amount__c** on Order records
- Deduct inventory stock when an order is placed

DETAILED EXECUTION OF PROJECT PHASES

1. **Developer Org Setup**

• A Saleforce Developer Org was created using https://www.salesforce.com/form/developer-signup/?d=pb.

• The account was verified, password set, and access was granted totheSalesforce Setup page.


2. Custom Object Creation

Five custom objects were developed to store essential business data:

- **HandsMen Customer** – Stores customer information such as email, phone number, and loyalty status.
- **HandsMen Product** – Contains product catalog details, including SKU, price, and available stock.
- **HandsMen Order** – Records customer orders, including product quantity and order status.
- **Inventory** – Tracks stock levels, warehouse locations, and restocking needs.
- **Marketing Campaign** – Holds promotional campaign details, schedules, and target segments.

Steps Followed:

1. Navigated to **Setup → Object Manager → Create → Custom Object**.
2. Provided the object **label**, **API name**, and enabled options such as **reports**, **search**, and **activities** where needed.

3. Saved each object and created corresponding **tabs** for easier user access and navigation.
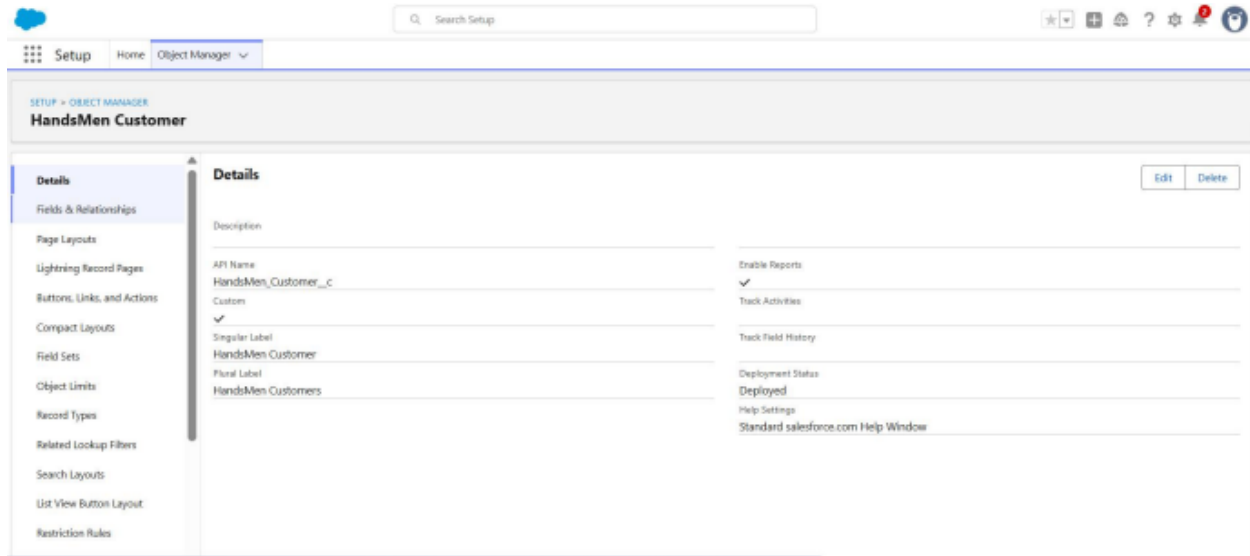
3. Lightning App Creation

A customized Lightning App named **HandsMen Threads** was created to streamline navigation and centralize business functions.
Key configurations include:

- Added essential tabs such as **HandsMen Customer**, **Order**, **Product**, **Inventory**, **Marketing Campaign**, **Reports**, and other related components.
- Assigned access to the **System Administrator** profile for full configuration and management capabilities.

4. Validation Rules

To maintain data accuracy and enforce business rules, the following validation rules were implemented:

- **Order Object**
  - **Purpose:** Prevent saving an order when `Total_Amount__c` is less than or equal to zero.
  - **Error Message:** *"Please enter the correct amount."*
- **Customer Object**
  - **Purpose:** Ensure the Email field contains "@gmail.com" to validate the format.
  - **Error Message:** *"Please enter a valid Gmail address."*

5. User Roles & Setup

- Cloned the **Standard User** profile to create a custom profile named **Platform1**, then configured the necessary permissions for all custom objects.
- Established a role hierarchy to support departmental access and reporting needs, including:
    - **Sales Manager**
    - **Inventory Manager**
    - **Marketing Team**

6. User Creation

Salesforce users were created and assigned appropriate roles and profiles based on their job responsibilities.

- **Niklaus Mikaelson** – Assigned to the **Sales** role
- **Kol Mikaelson** – Assigned to the **Inventory** role

These role-based assignments ensure proper data visibility, security, and workflow control across the system.
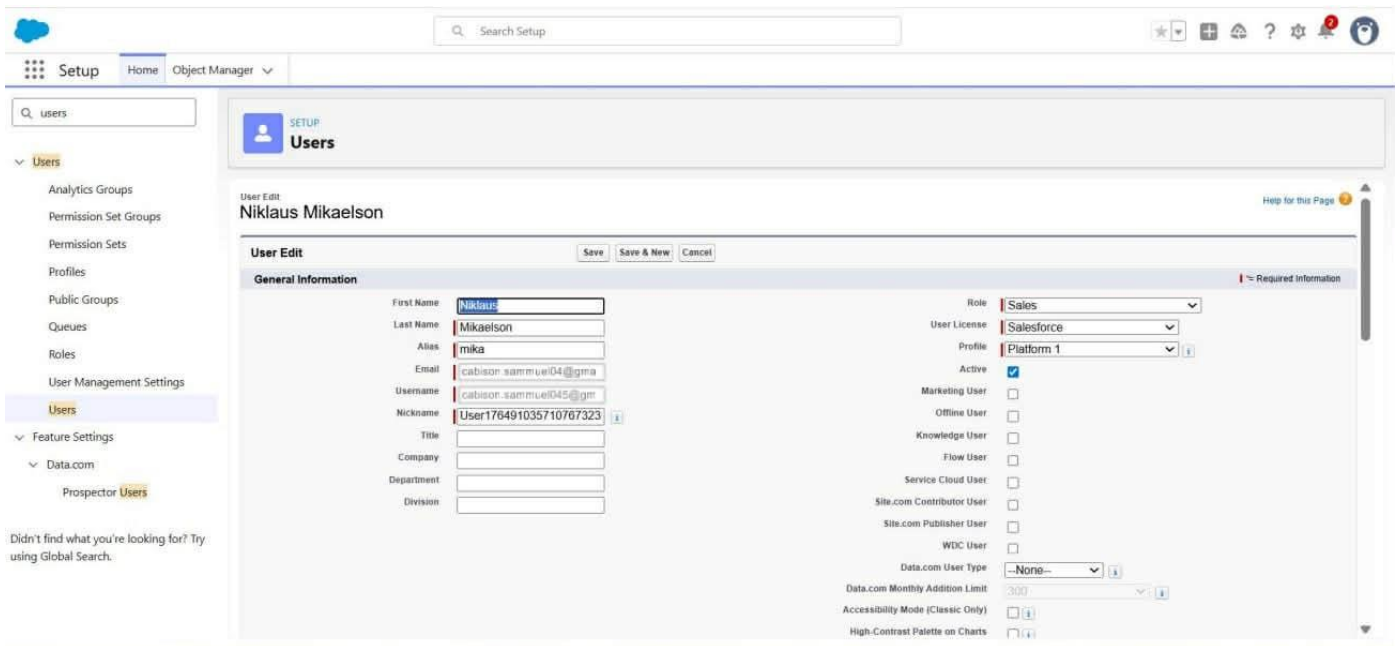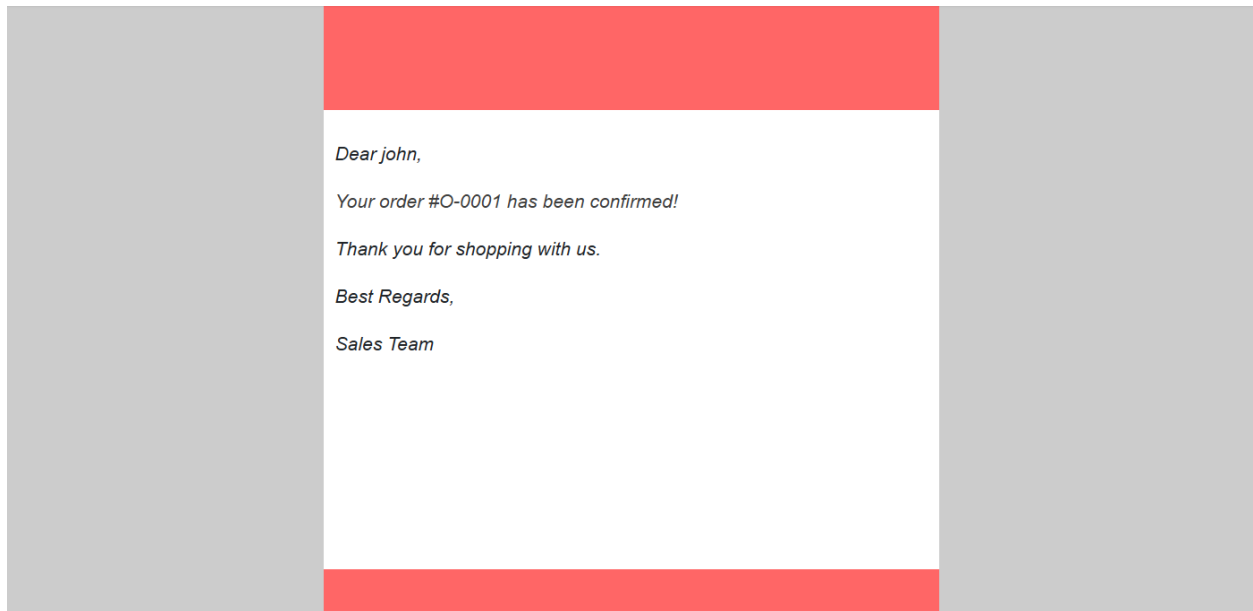
7. Email Templates & Alerts

Three email templates were created to support automated customer and internal notifications:

- **Order Confirmation** – Sent automatically when an order's status is updated to *Confirmed*.
- **Low Stock Alert** – Triggered when inventory levels fall below 5 units.
- **Loyalty Program Email** – Sent to customers whenever their loyalty status changes.

Corresponding **Email Alerts** were configured using these templates and integrated into automation flows to ensure timely and consistent communication.

Dear john,

Your order #O-0001 has been confirmed!

Thank you for shopping with us.

Best Regards,

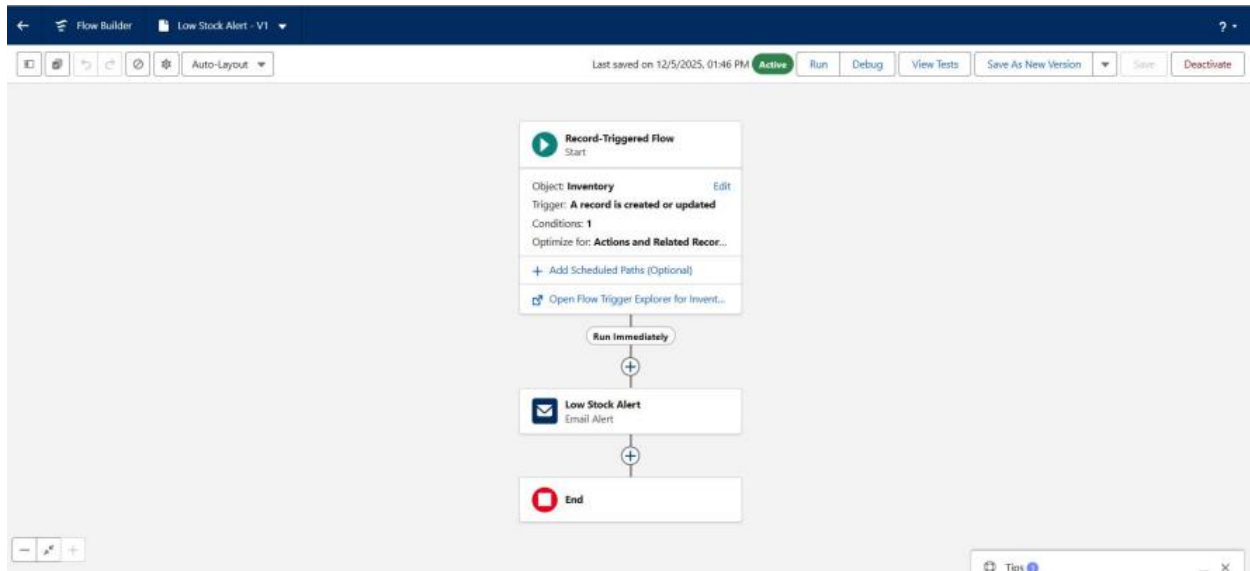*Sales Team*

8. Flow Implementation

A. Order Confirmation Flow

- Triggered automatically when an order's status is updated to **Confirmed**.
- Sends an **Order Confirmation** email to the associated customer using the predefined email template.
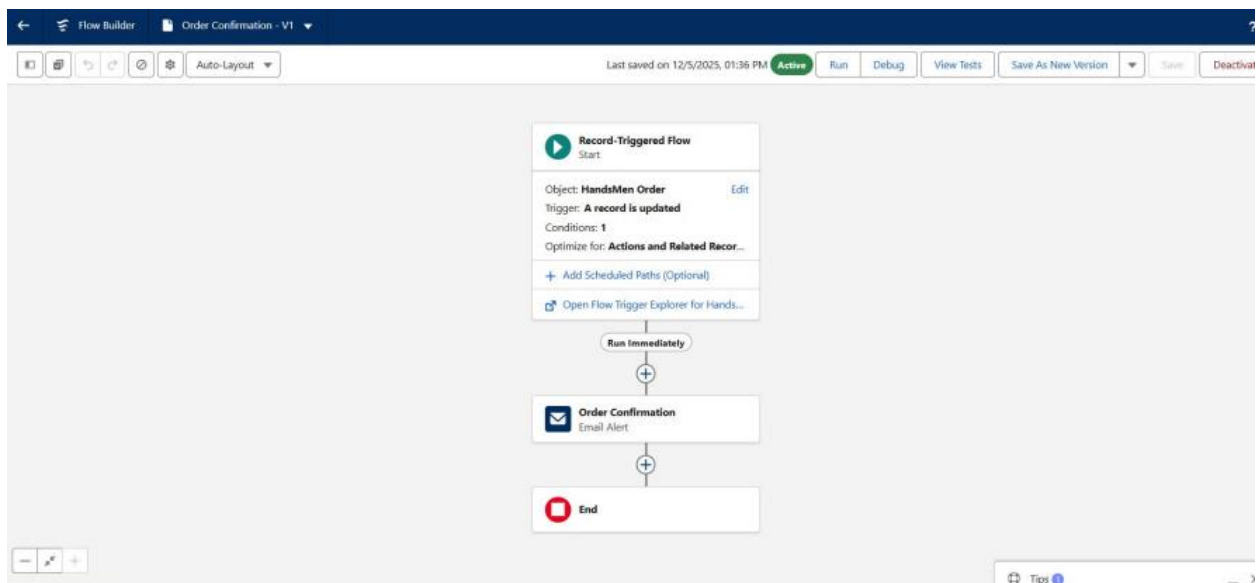
B. Stock Alert Flow

• Triggered when Inventory stock drops below 5

 • Sends Low Stock email to Inventory Manager

C. Scheduled Flow: Loyalty Update

- Runs automatically **every day at midnight**.
- Reviews all customer records and updates their **Loyalty Status** based on the customer's total purchase amount.

9. Apex Triggers

- **Order Total Trigger** – Automatically calculates the **Total Amount** for an order based on product quantity and unit price.
- **Stock Deduction Trigger** – Reduces the inventory stock levels whenever an order is placed.
- **Loyalty Status Trigger** – Updates the customer's **Loyalty Status** based on their cumulative purchases.
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PROJECT EXPLANATION WITH REAL-WORLDEXAMPLE

Customer Interaction Walkthrough

1. Customer Registration

- A new customer, **Elijah Mikaelson**, visits the store or website.
- In Salesforce, a **Customer** record is created with his personal details, including name, phone number, and email.

2. Product Setup

- The admin adds products such as **Shirts** and **Jeans** into the **Product__c** object.
- Each product includes price, description, and other relevant details.
- An **Inventory** record is also created to track stock levels for these products.

3. Order Placement

- Elijah decides to purchase **2 shirts** at **₱500 each**.
- A new order record is created in Salesforce.
- **Apex Trigger** automatically calculates the **Total_Amount__c**: $2 \times 500 = 1000$.

4. Inventory Update

- Upon order creation:
    - **Apex Trigger** reduces the shirt stock by 2.
    - **Validation Rule** ensures that inventory levels never fall below 0.

5. Loyalty Program

- Elijah's total purchases now amount to 1000.
- A **Customer Apex Trigger** checks total purchases and updates **Loyalty Status**:
    - $< 500 \rightarrow$ Bronze
    - $500 - 1000 \rightarrow$ Silver
    - $1000 \rightarrow$ Gold

- Elijah is upgraded to **Silver** membership.

6. Email Notifications

- When an order is placed or loyalty status is updated:
    - **Flow** + **Email Alerts** are triggered.
    - Elijah receives an email: *"Thank you for your purchase! Your loyalty status is now Silver."*

7. Users and Roles

- Salesforce users are created to manage operations:
    - **Niklaus Mikaelson** – Sales Role (Platform1 Profile)
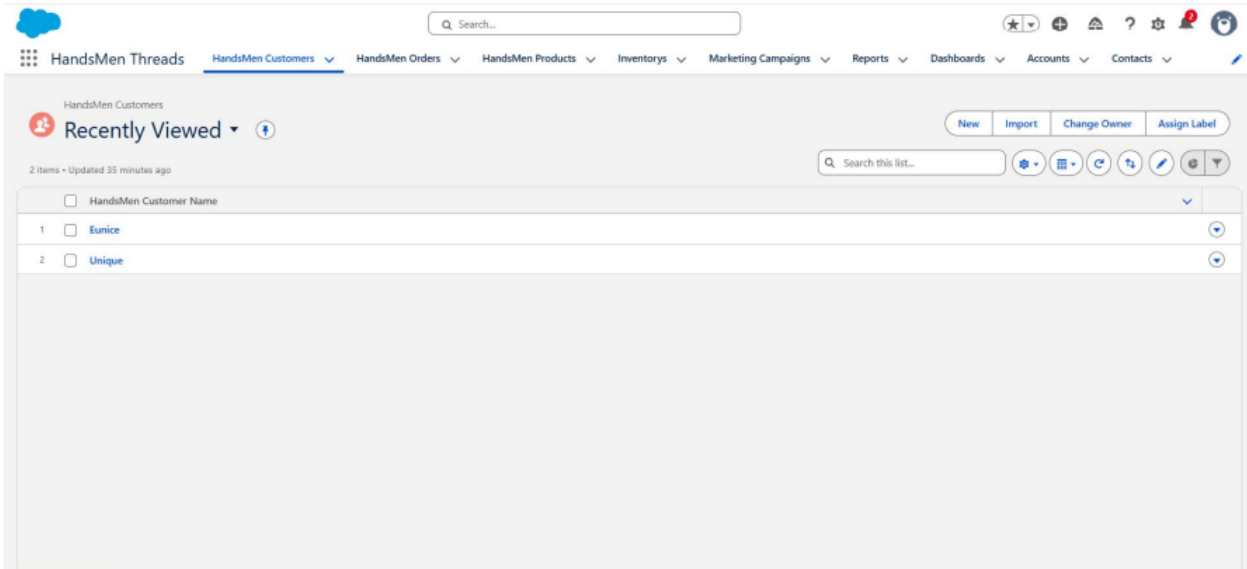   - **Kol Mikaelson** – Inventory Role (Platform1 Profile)

SCREENSHOTS

Fig: Custom App for HandsMen Threads
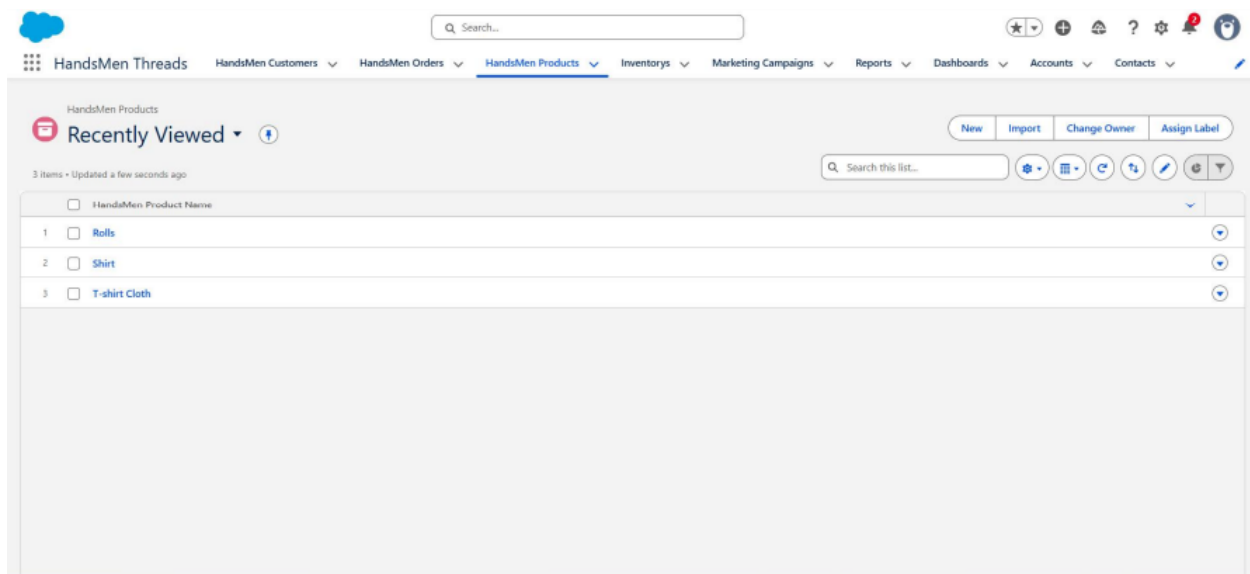
Fig: Customer Creation in HandsMen Threads
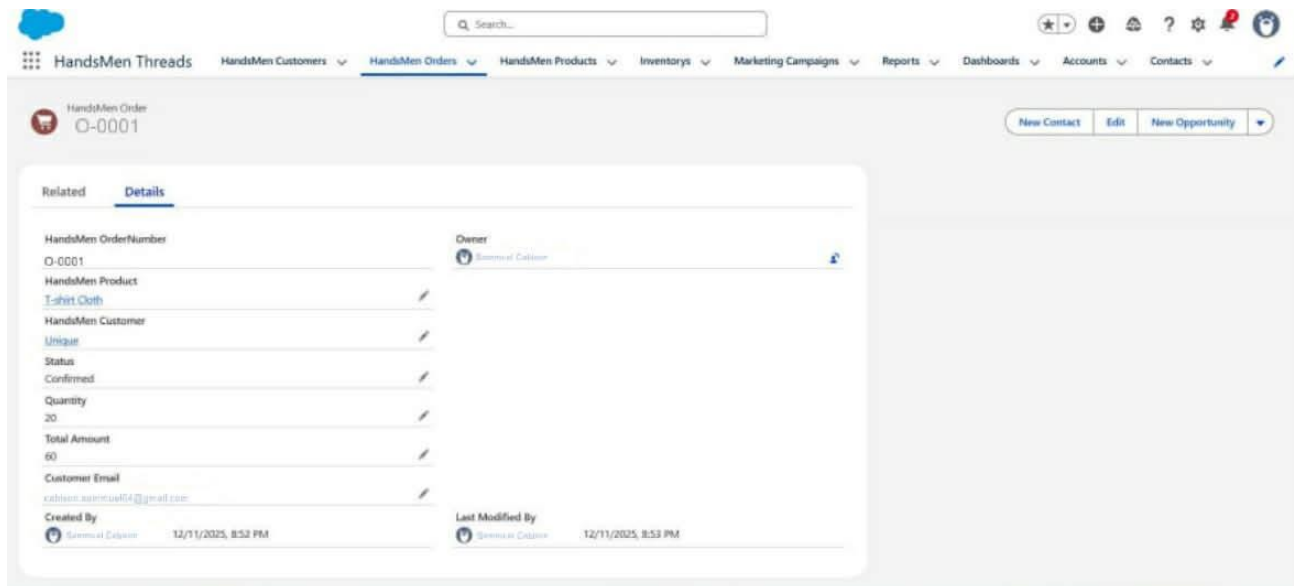

Fig: Products in HandsMen Threads

Fig: Order Confirmation

CONCLUSION

The **HandsMen Threads CRM system** built on Salesforce effectively streamlines essential business operations, including customer management, product cataloging, order processing, inventory tracking, and loyalty program automation. By utilizing Salesforce features such as **Custom Objects, Flows, Validation Rules, Email Alerts, and Apex**, the system ensures accurate data entry, real-time updates, and a seamless customer experience. Automation and clearly defined user roles reduce manual errors, accelerate operations, and provide valuable insights into sales performance and stock levels.

Future Scope

1. **Customer Portal Integration**
   - Develop a **Customer Community Portal** where clients can log in, view their orders, and track loyalty status.
2. **Mobile App using Salesforce Mobile SDK**
   - Allow store staff to manage inventory and process orders via a mobile interface for greater flexibility.
3. **Reports & Dashboards**
   - Create comprehensive sales and inventory dashboards to monitor trends, performance, and operational metrics in real-time.
4. **AI-Powered Recommendations (Einstein)**
   - Leverage **Salesforce Einstein** to provide personalized product suggestions based on customers' purchase history.
5. **WhatsApp/SMS Integration**
   - Send notifications to customers via WhatsApp or SMS for order confirmations and loyalty program updates.