

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

## ABSTRACT:

The project titled "*HandsMen Threads: Elevating the Art of Sophistication in Men's Fashion*" focuses on developing a tailored Salesforce CRM solution for a luxury men's fashion brand. Its primary aim is to optimize internal data management, boost customer satisfaction, and support seamless communication between departments.

A custom data model was designed to include essential business entities such as **Customer**, **Order**, **Product**, **Inventory**, and **Marketing Campaign**. To improve operational flow, several automation processes were implemented using Salesforce tools like **Record-Triggered Flows**, **Scheduled Flows**, **Email Alerts**, and **Apex triggers**. These processes enable automated order confirmations, dynamic loyalty program updates, and timely stock replenishment alerts.

To uphold data consistency and security, **validation rules** and a **role-based access control system** were incorporated. Additionally, an **asynchronous Apex batch process** runs daily to manage bulk updates, particularly for inventory tracking.

This Salesforce-based solution not only enhances user experience through automated, personalized services but also builds a scalable and efficient foundation for long-term business growth within the fashion retail sector.

## OBJECTIVE:

The primary goal of this project is to design and implement a tailored Salesforce CRM solution for **HandsMen Threads**, a premium men's fashion brand, to improve core business workflows, uphold data accuracy, and enhance overall customer engagement.

By developing an integrated system to efficiently manage customers, orders, products, inventory, and marketing campaigns, the project focuses on:

- **Streamlining essential operations** like order notifications, loyalty program updates, and low-stock alerts through automation.
- **Maintaining data reliability and precision** using validation mechanisms to ensure consistent data entry.
- **Providing up-to-date insights** into inventory levels and customer behavior for better business visibility.
- **Strengthening team collaboration** by implementing secure, role-based access to relevant information.
- **Creating tailored customer experiences** with targeted marketing and customized reward systems.

## **TECHNOLOGIES USED:**

### **Salesforce Platform:-**

Salesforce is a cloud-based CRM system designed to help organizations manage customer information, automate business processes, and improve interactions across sales, service, and marketing. It supports both declarative tools (like Flows and Validation Rules) and programmatic tools (such as Apex) to build efficient and customized solutions.

### **Custom Objects:-**

Custom objects serve as database tables where specific business data is stored. In this project, objects such as `Customer__c`, `Product__c`, and `Order__c` were created to manage and organize relevant data for each business function.

### **Tabs:-**

Tabs act as visual access points in the Salesforce interface, allowing users to view and interact with records from custom or standard objects. For instance, a tab for `Product__c` enables the team to manage product listings easily.

### **Custom App:-**

A custom app was configured by grouping related tabs and components to serve the operational needs of HandsMen Threads, offering a focused workspace for users.

### **Profiles:-**

Profiles determine a user's permissions within Salesforce, defining what data they can view, create, or edit. They play a key role in maintaining security and controlling access levels.

### **Roles:-**

Roles are used to structure data access across the organization. They help define which users can view records owned by others, based on the role hierarchy.

### **Permission Sets:-**

To extend user permissions without altering their assigned profile, permission sets were utilized—particularly for users who needed temporary or additional access.

### **Validation Rules:-**

Validation rules enforce specific conditions when users enter data, ensuring that all information meets business standards. Examples include validating email formats or preventing negative stock entries.

### **Email Templates:-**

Email templates provide pre-designed formats for communicating with customers or internal teams. For instance, a "Thank You for Your Order" template was created to send post-order confirmations.

### **Email Alerts:-**

These alerts are automated actions triggered by workflows or flows that send emails based on business conditions—such as notifying a customer when their loyalty tier changes.

### Flows:-

Flows were used to automate tasks without writing code. They handle processes like sending email alerts after a new order or updating loyalty status based on purchase history.

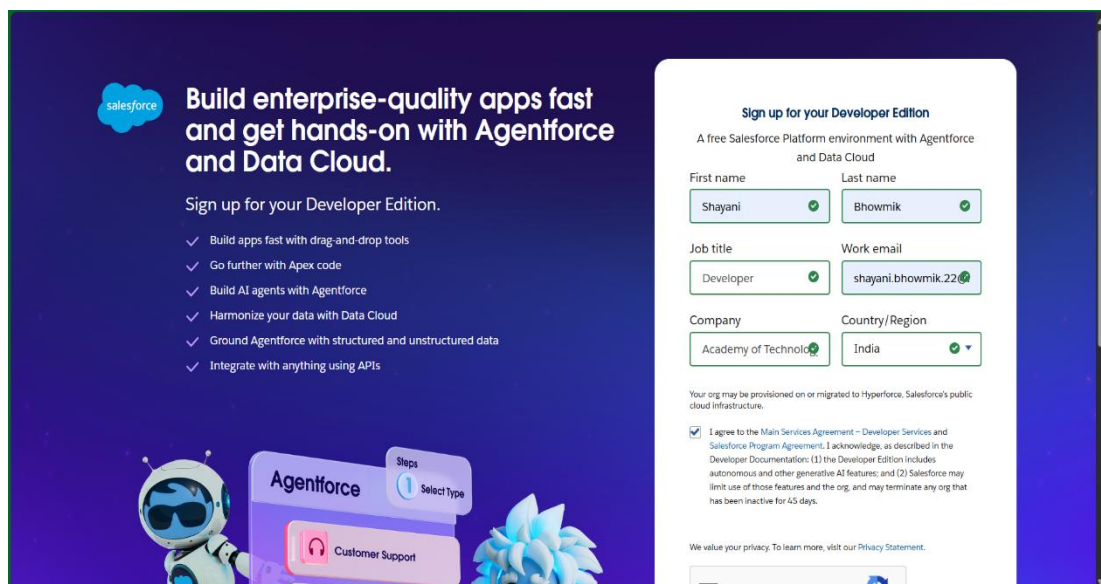
### Apex Programming:-

Apex is Salesforce's proprietary object-oriented programming language. It was used in this project to implement custom backend logic, such as updating total amounts in orders or reducing stock levels when a purchase is made.

## EXECUTION OF PROJECT PHASES :

### 1. Developer Org Setup

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



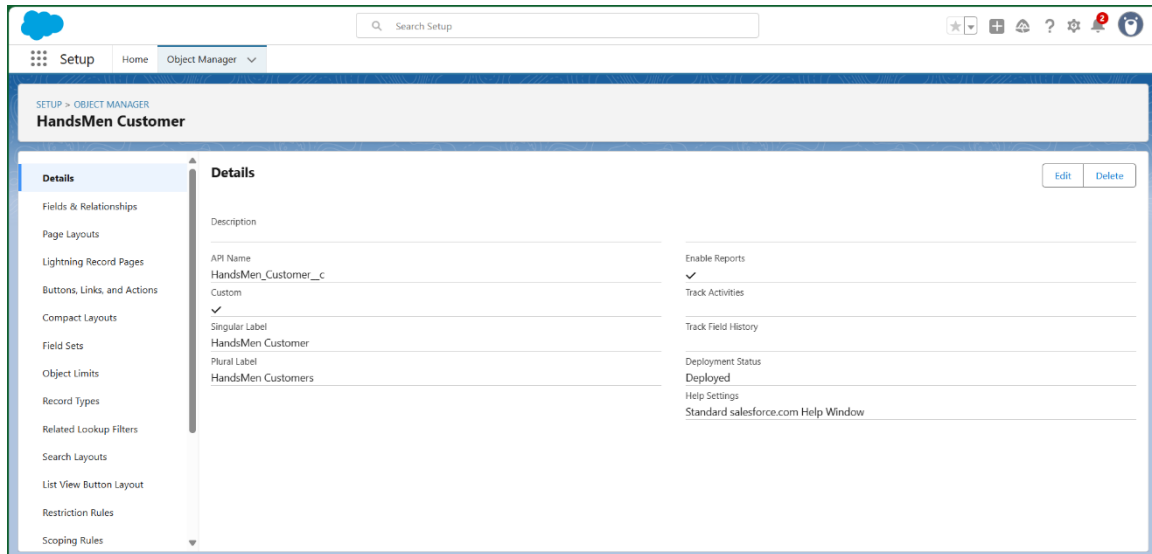
### 2. Custom Object Creation

Five custom objects were created to store business-critical data:

- **HandsMen Customer-** Stores customer info like email, phone, loyalty status.
- **HandsMen Product-** Stores product catalog details like SKU, price, and stock.
- **HandsMen Order-** Stores orders placed by customers, including quantity and status.
- **Inventory-** Tracks stock quantity and warehouse location.
- **Marketing Campaign-** Stores promotional campaigns and scheduling.

## Setup followed:

- Navigated to Setup -> Object Manager -> Create -> Custom Object
- Provided label, name and enabled reports/search
- Saved and create Tabs for each object



## 3. Creating the Lightning App

- A custom Lightning App named HandsMen Threads was created.
- Included tabs: HandsMen Customer, Order, Product, Inventory, Campaign, Reports, etc.
- Assigned to the System Administrator profile.

## 4. Validation Rules

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

- **Order Object:** Prevents saving if Total\_Amount\_\_c <= 0.  
Error: "Please Enter Correct Amount"
- **Customer Object:** Validates email contains @gmail.com.  
Error: "Please fill Correct Gmail"

## 5. User Role & Profile Setup

- Cloned the Standard User profile to a new profile named Platform I and added access to necessary custom objects.
- Created roles for different departments:
  - 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.

The screenshot shows the Salesforce Setup interface with the 'Users' section selected. The 'User Edit' form for 'Niklaus Mikaelson' is displayed. The form includes fields for General Information (First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, Division) and Role (Sales, User License: Salesforce, Profile: Platform 1). The 'Active' checkbox is checked. The 'Marketing User' checkbox is unchecked. The 'Data.com User Type' is set to 'None--'. The 'Data.com Monthly Addition Limit' is set to 300. The 'Accessibility Mode (Classic Only)' is set to 'None'. The 'High Contrast Palette on Charts' is set to 'None'.

## 7. Email Template & Alerts

Create three email templates:

- Order Confirmation – Sent on order status = Confirmed
- Low Stock Alert – Sent when Inventory <5 units
- Loyalty Program Email – Sent when loyalty status changes

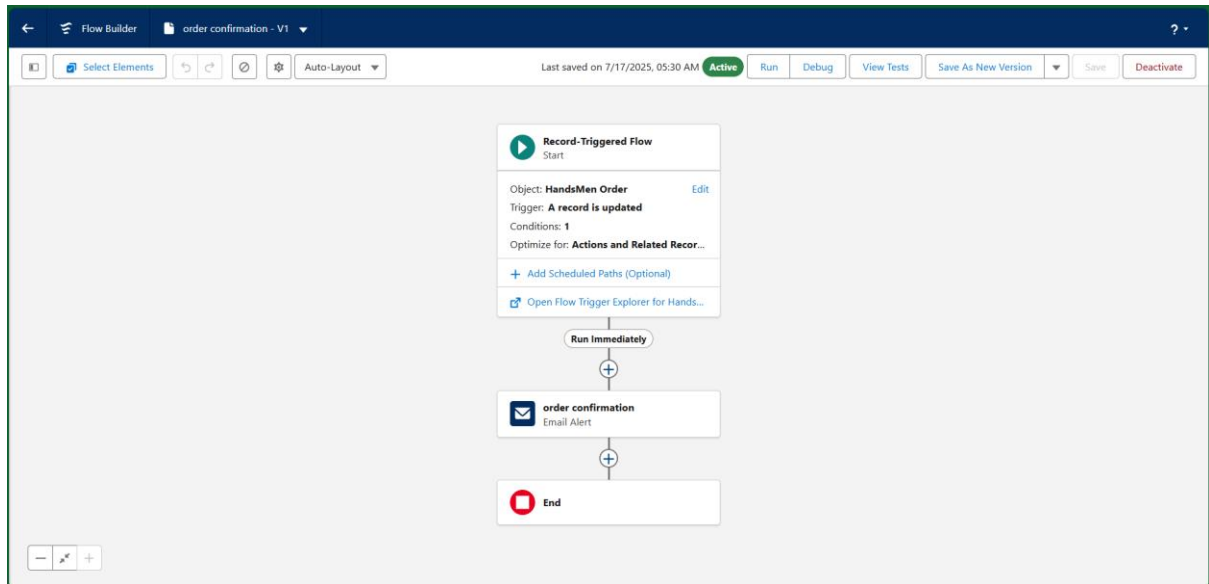
Corresponding Email Alerts were created using these templates and linked to automation flows.

The screenshot shows the Salesforce Setup interface with the 'Classic Email Templates' section selected. The 'Email Template Edit' form for 'Order Confirmation Email' is displayed. The form includes fields for Email Template Information (Folder: Unfiled Public Classic Email Templates, Available For Use: checked, Email Template Name: Order Confirmation Email, Template Unique Name: Order Confirmation Email, Classic Letterhead: Handsmen Threads, Email Layout: Free Form Letter, Encoding: Unicode (UTF-8), Description: Your Order has been Confirmed!, Subject: Your Order has been Confirmed!). The 'Available Merge Fields' section shows 'Contact Fields' selected. The 'Save' button is highlighted.

## 8. Flow Implementations

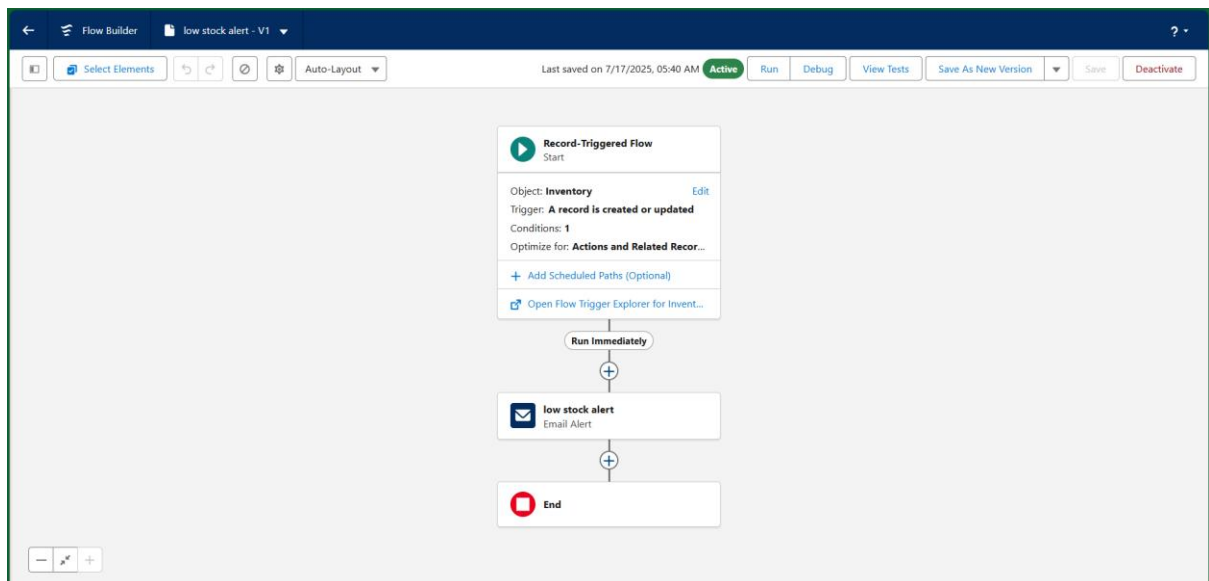
### a. Order Confirmation Flow

- Triggered when an order is updated to Confirmed.
- Sends an Order Confirmation email to the related customer.



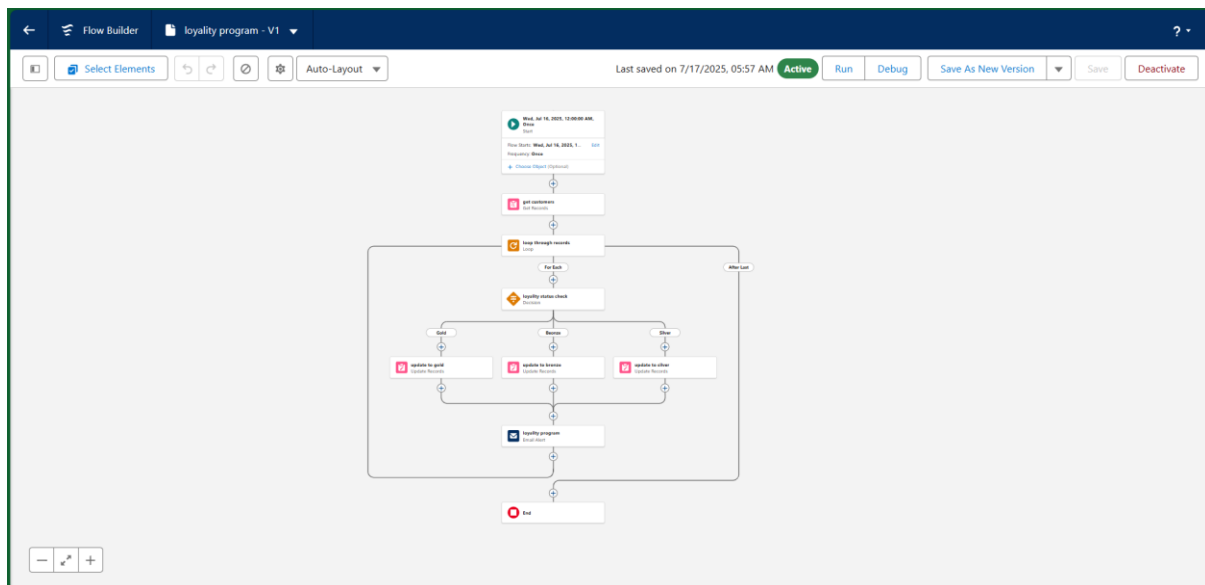
### b. Stock Alert Flow

- Triggered when Inventory stock drops below 5.
- Sends Low Stock email to Inventory Manager.



### c. Scheduled Flow: Loyalty Update

- Runs daily at midnight.
- Loops through customer and update their Loyalty Status based on total purchases.



## 9. Apex Triggers

- **Order Total Trigger:** Auto-calculates Total Amount based on quantity and unit price.
- **Stock Deduction Trigger:** Reduces stock when an order is placed.
- **Loyalty Status Trigger:** Updates Loyalty Status based on total purchases.

## REAL-WORLD EXAMPLES:

### 1. Order Confirmation Automation

**Scenario:** A customer places an order for a custom-tailored suit.

**Before Salesforce:** The sales team manually sends a confirmation email, often leading to delays.

**Now with Salesforce:** As soon as the order is created in the system, an **automated email alert** is triggered using **Flow**, sending a confirmation message instantly to the customer. This improves communication and builds trust.

### 2. Loyalty Program Management

**Scenario:** A returning customer has made purchases worth ₹20,000 in the past month.

**Old Process:** The marketing team had to check manually and update loyalty levels.

**New Process:** Salesforce automatically calculates purchase totals. Using **Record-Triggered Flow**, the system updates the customer's **Loyalty\_Status\_\_c** field and sends a special discount coupon via email, encouraging repeat business.

### 3. Stock Alert System

**Scenario:** The inventory for “Navy Blue Linen Shirt” drops to 3 units.

**Old Method:** Warehouse teams manually checked stock and often missed low quantities.

**Salesforce Integration:** A **Scheduled Apex Batch Job** checks inventory every night. If stock for any item is below 5, an **email alert** is automatically sent to the warehouse for restocking, preventing out-of-stock issues.

### 4. Role-Based Access and Data Security

**Scenario:** The marketing team should only see campaign data, while the inventory team should manage product stock.

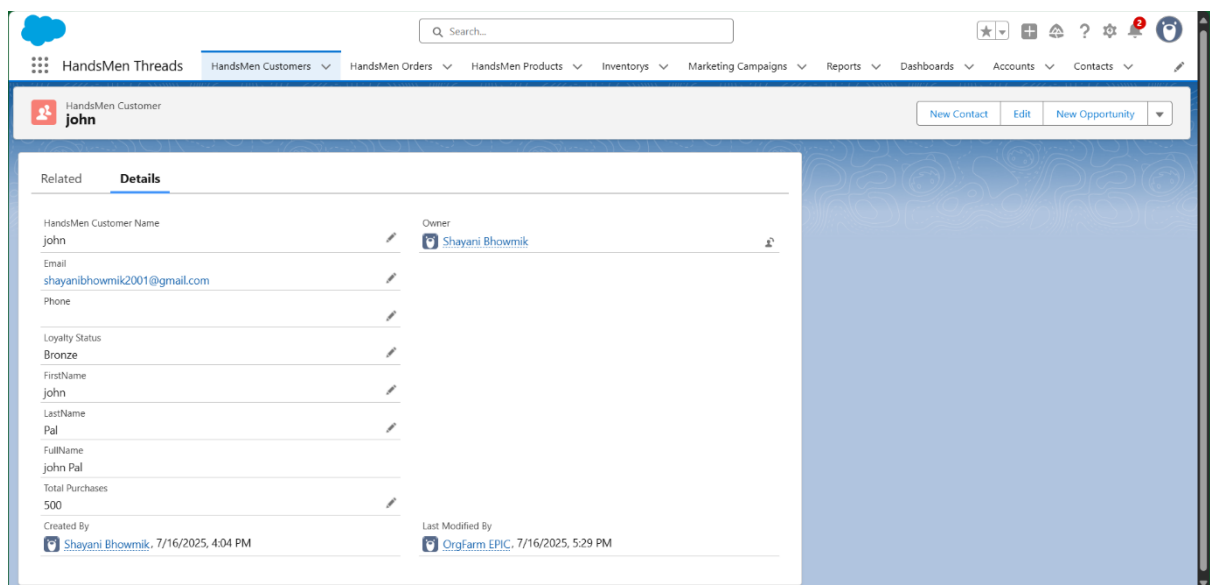
**Implementation:** By assigning **Profiles and Roles**, access is controlled. For example, marketers can't edit inventory data, and inventory staff can't view sensitive sales reports. This ensures **data security and team efficiency**.

### 5. Bulk Order Financial Updates

**Scenario:** The business processes large bulk orders daily at midnight.

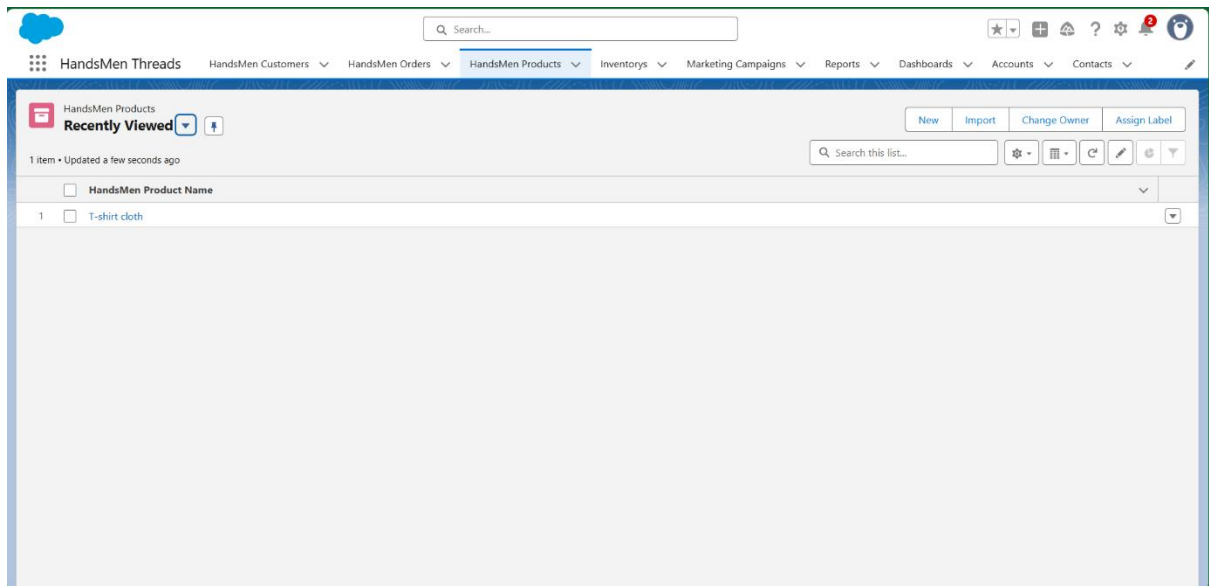
**Salesforce Solution:** A **Scheduled Flow** runs automatically at 12:00 AM to update financial summaries, adjust stock, and ensure the next day's records are accurate without human involvement.

## SCREENSHOTS

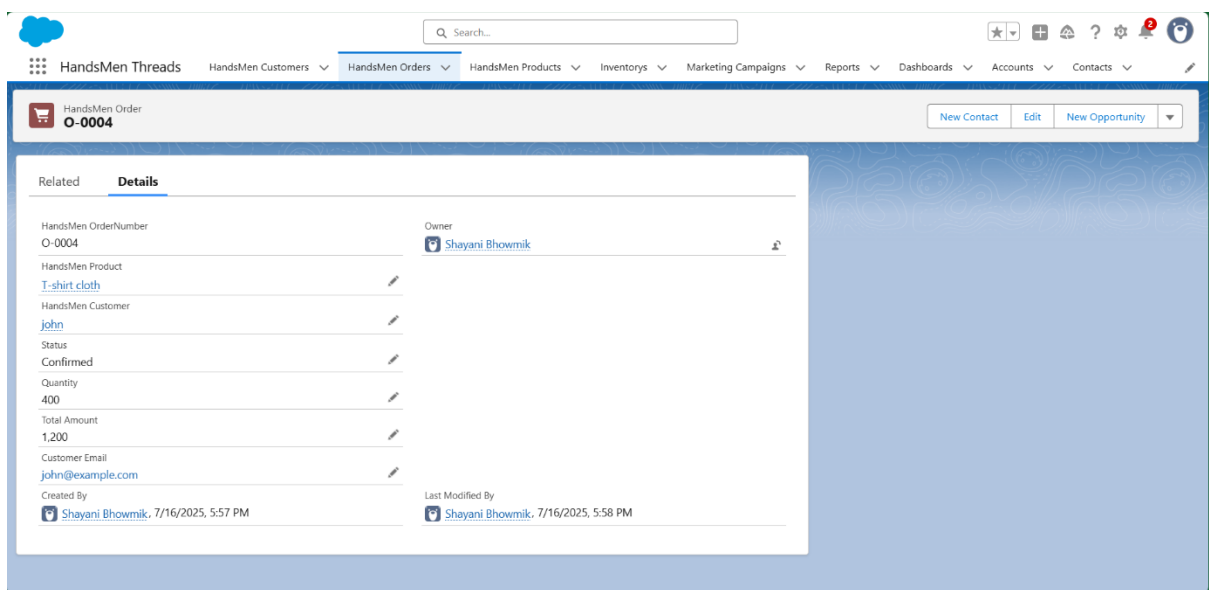


**Fig: Customer Creation in HandsMen Threads**

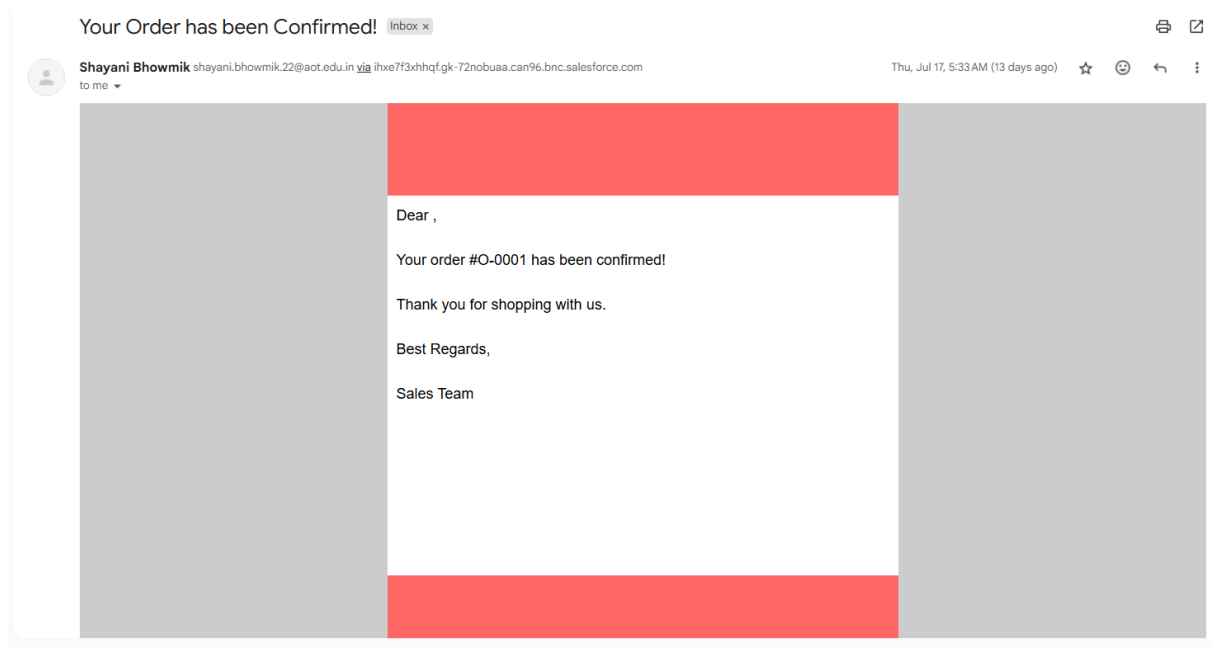




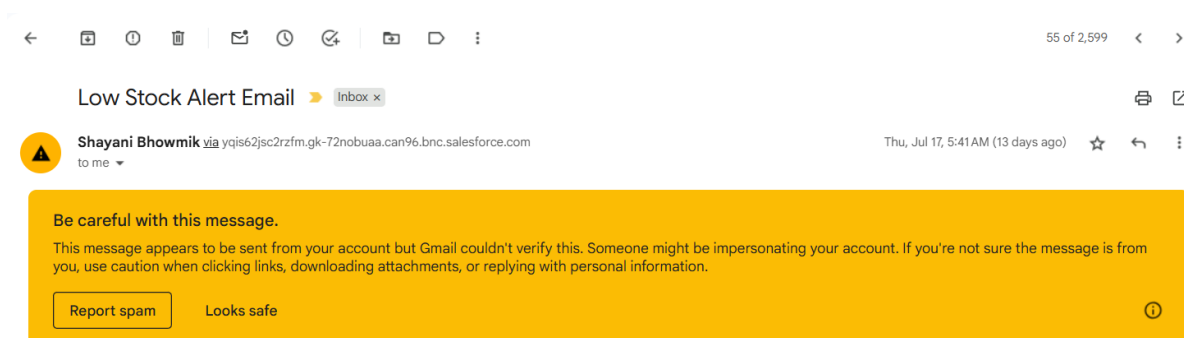
**Fig: Products in HandsMen Threads**



**Fig: Order Confirmation**

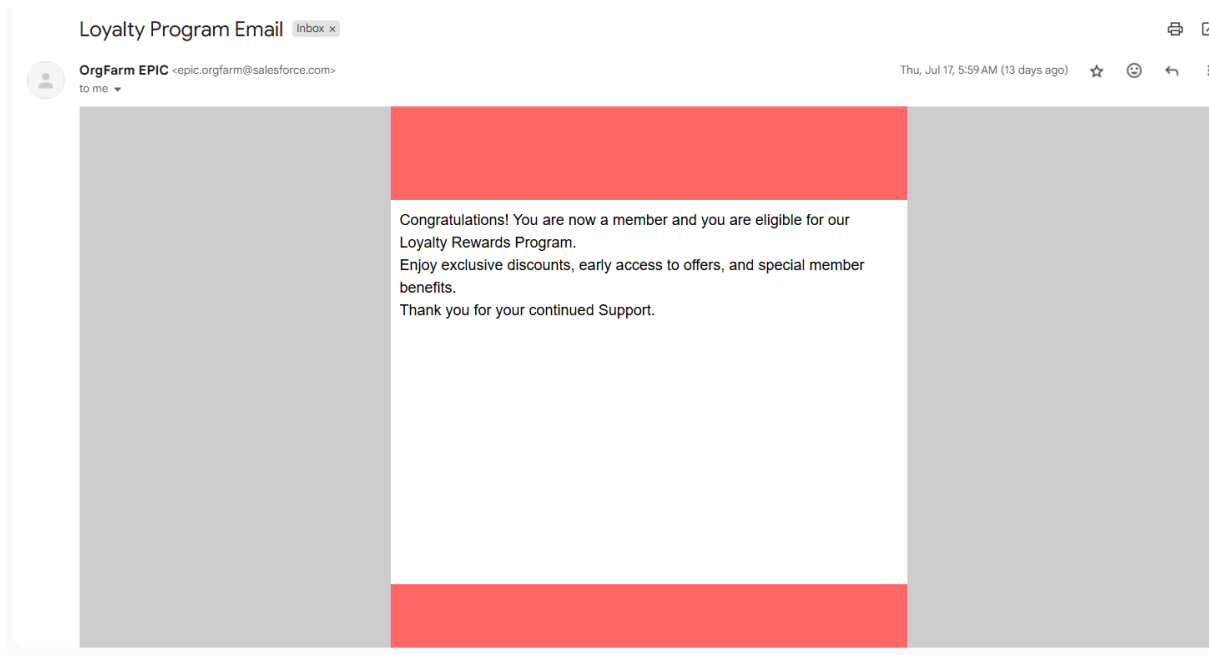


**Fig: Order Confirmation Email**



Dear Inventory Manager,  
This is to inform you that the stock for the following product is running low:  
Product Name:  
Current Stock Quantity:  
Please take the necessary steps to restock this item immediately.  
Best Regards,  
Inventory Monitoring System

**Fig: Low Stock Alert Email**



**Fig: Loyalty Program Email**

## **Conclusion:**

The implementation of the Salesforce CRM solution for HandsMen Threads has significantly streamlined core business operations by integrating customer management, order processing, inventory control, and marketing workflows into a single platform. Through automation, real-time updates, and role-based access, the system enhances data accuracy, improves communication across teams, and delivers a personalized customer experience.

This project not only demonstrates how digital tools can simplify traditional business processes but also shows the potential of low-code and code-based Salesforce features in solving real-world problems. By leveraging powerful tools such as Flows, Apex, and Validation Rules, HandsMen Threads is now better equipped to handle growing customer demands and scale its business operations efficiently.

## **Future Scope:**

Looking ahead, the CRM solution can be expanded and optimized in several ways to add even more value:

**Integration with E-commerce Platforms:** Connecting Salesforce with online shopping platforms (like Shopify or WooCommerce) to sync real-time orders, customer reviews, and returns.

- **Mobile App Access:** Developing a mobile-friendly version of the CRM for sales or inventory teams to access on the go, improving field efficiency.

- **Advanced Analytics and Reporting:** Using **Salesforce Einstein Analytics** or **Tableau CRM** for deeper insights into customer behavior, seasonal trends, and sales forecasting.
- **Chatbot and AI Integration:** Implementing AI-powered customer support chatbots for instant responses to common queries, loyalty status, or order tracking.
- **Automated Vendor Management:** Enhancing the inventory system to automatically notify and place restock orders with vendors when products run low.
- **Multi-Region Expansion:** Customizing the CRM to support multiple regions or countries by incorporating multi-currency, multi-language, and regional tax settings.