HANDSMEN THREADS: ELEVATING THE ART OF SOPHISTICATION IN MEN'S FASHION

ABSTRACT

This project showcases the development of a tailored Salesforce CRM solution for *HandsMen Threads*, a premium brand in men's fashion and tailoring. The primary goal was to optimize internal operations, boost customer interaction, and uphold data integrity throughout various business functions.

The system architecture includes a well-structured data model built around five essential custom objects: Customer, Order, Product, Inventory, and Marketing Campaign. Core business activities were automated using Record-Triggered Flows, Scheduled Flows, Email Notifications, and Apex to manage tasks such as order confirmations, loyalty program updates, and low-stock alerts.

To maintain data quality and security, validation rules were applied, and a role-based access model was configured for different teams, including Sales, Inventory, and Marketing. Additionally, a scheduled Apex batch job was used to monitor and update inventory levels for items nearing stock depletion.

This comprehensive CRM solution enhances the customer journey through automated and personalized communication, streamlines backend operations through intelligent automation, and provides a scalable framework to support the company's long-term growth on the Salesforce platform.

OBJECTIVE

The primary aim of this project is to design and deploy a customized Salesforce CRM solution for HandsMen Threads that enhances operational efficiency, upholds data consistency, and improves customer satisfaction.

By establishing a centralized platform to oversee customers, orders, products, inventory, and marketing efforts, the project seeks to:

- Automate essential workflows such as order confirmations, loyalty program updates, and inventory alerts.

- Enforce consistent and reliable data input through robust validation mechanisms.

- Provide real-time insights into stock levels and customer engagement.

- Strengthen collaboration among departments with role-specific access controls.

- Offer tailored customer experiences via targeted communications and loyalty-driven interactions.

TECHNOLOGY DESCRIPTION

Salesforce:

Salesforce is a cloud-based CRM (Customer Relationship Management) platform designed to help businesses manage customer relationships, streamline operations, and enhance performance across sales, marketing, and service departments. It supports both no-code tools (like Flows and Process Builder) and code-based customization using Apex.

Custom Objects:

These are user-defined objects that function similarly to database tables and are used to store specific types of business data.

Examples:

- Customer__c: Stores customer details

- Product__c: Maintains product information

- Order__c: Tracks order data

Tabs:

Tabs provide a user interface element to view and interact with object records.

Example: A tab for Product__c lets users manage product entries directly.

Custom App:

A Custom App in Salesforce is a group of related tabs that support a specific business workflow or process.

Profiles:

Profiles determine what a user can access and do in the system, such as visibility into objects, field-level permissions, and feature access.

Roles:

Roles define data access based on a hierarchy, enabling users to view records shared up or down the hierarchy depending on their role.

Permission Sets:

These are used to extend user access without modifying their base profile—ideal for granting extra permissions to specific users.

Validation Rules:

Validation rules enforce business logic by restricting invalid data entry.

Examples:

- Email should end with @gmail.com

- Stock value must be non-negative

Email Templates:

These are pre-designed formats used for sending standardized messages.

Example: "Order Confirmation" template used when confirming purchases.

Email Alerts:

An automated feature that sends emails based on defined triggers or workflow actions using a selected email template.

Example: An alert when a customer's loyalty tier is updated.

Flows:

Flows allow automation of business tasks through a visual interface without writing code.

Example: A flow that sends an order confirmation email when a new order is placed.

Apex:

Apex is Salesforce's proprietary object-oriented language used for building complex business logic and custom automation.
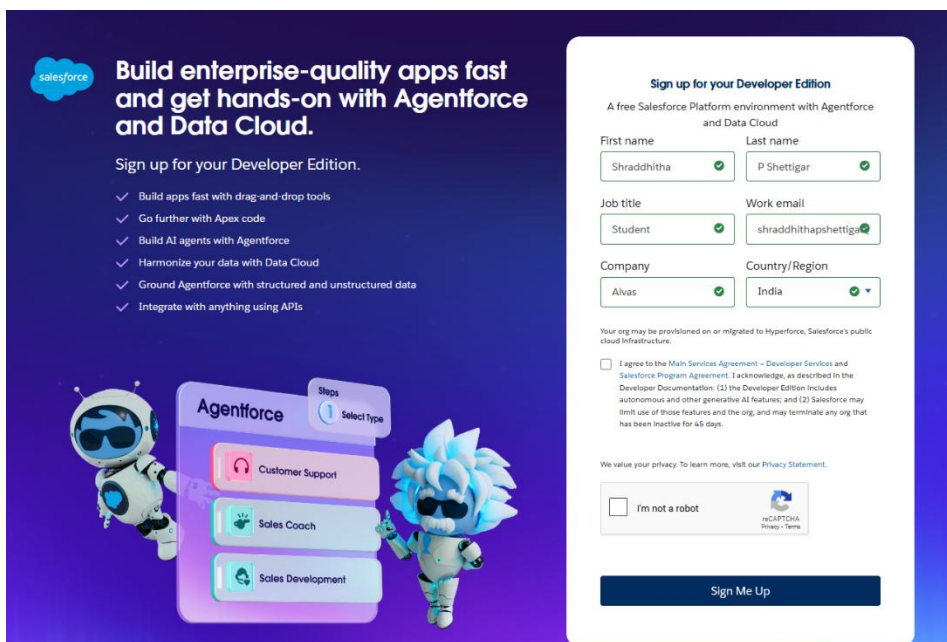
Example Triggers:

- Automatically updating the total order amount

- Decreasing inventory count when an order is placed

DETAILED EXECUTION OF PROJECT PHASES

1. Setting Up the Developer Org

A new Salesforce Developer Org was created by signing up at developer.salesforce.com. The account setup was completed by verifying the email, setting a password, and accessing the Setup environment to begin customization.
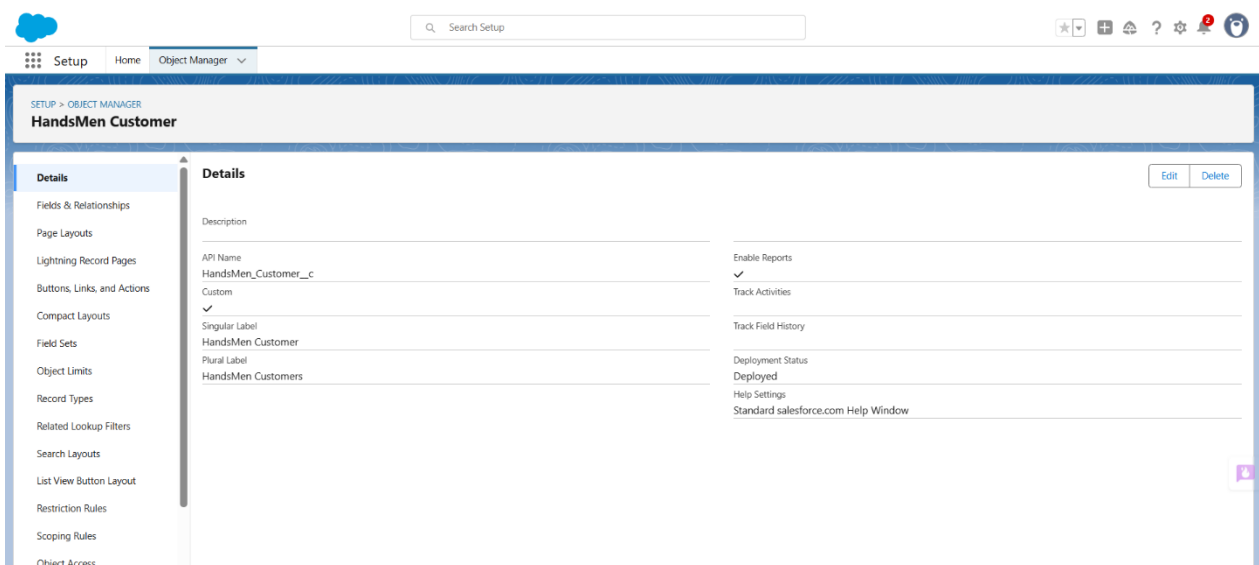
2. Custom Object Creation

To store the business data of HandsMen Threads, five custom objects were developed:
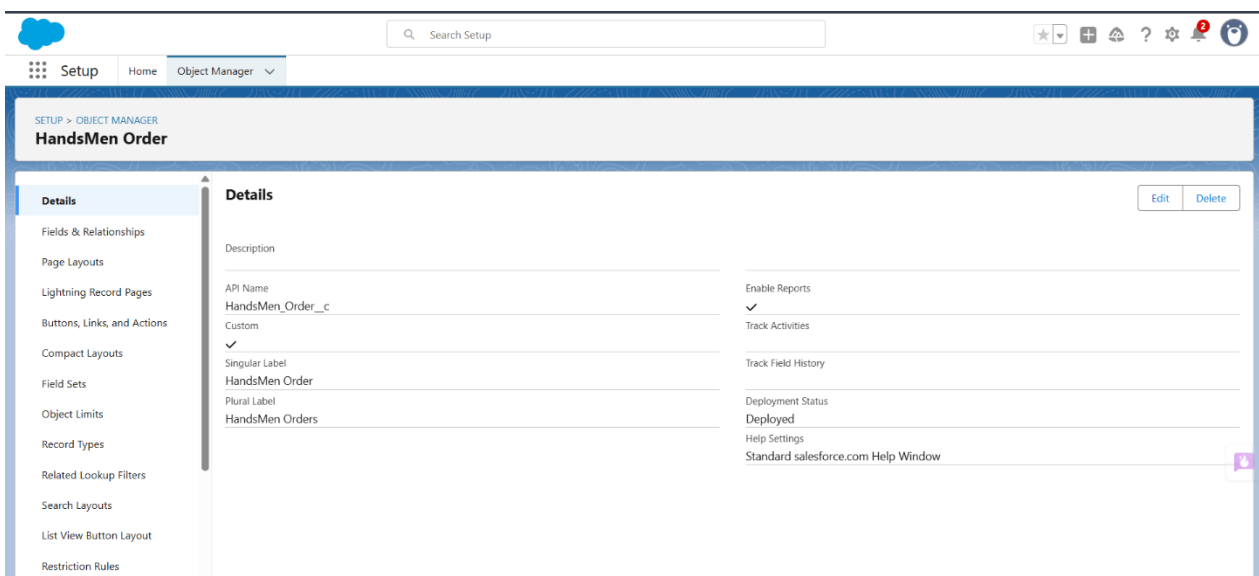
- **HandsMen Customer:** Captures customer details such as email, contact number, and loyalty tier.

- **HandsMen Product:** Maintains information on products including SKU, pricing, and availability.

- **HandsMen Order:** Tracks customer orders with fields like quantity, total amount, and order status.

- **Inventory:** Manages product stock levels and warehouse details.

- **Marketing Campaign:** Records ongoing and upcoming promotional campaigns with timing details.
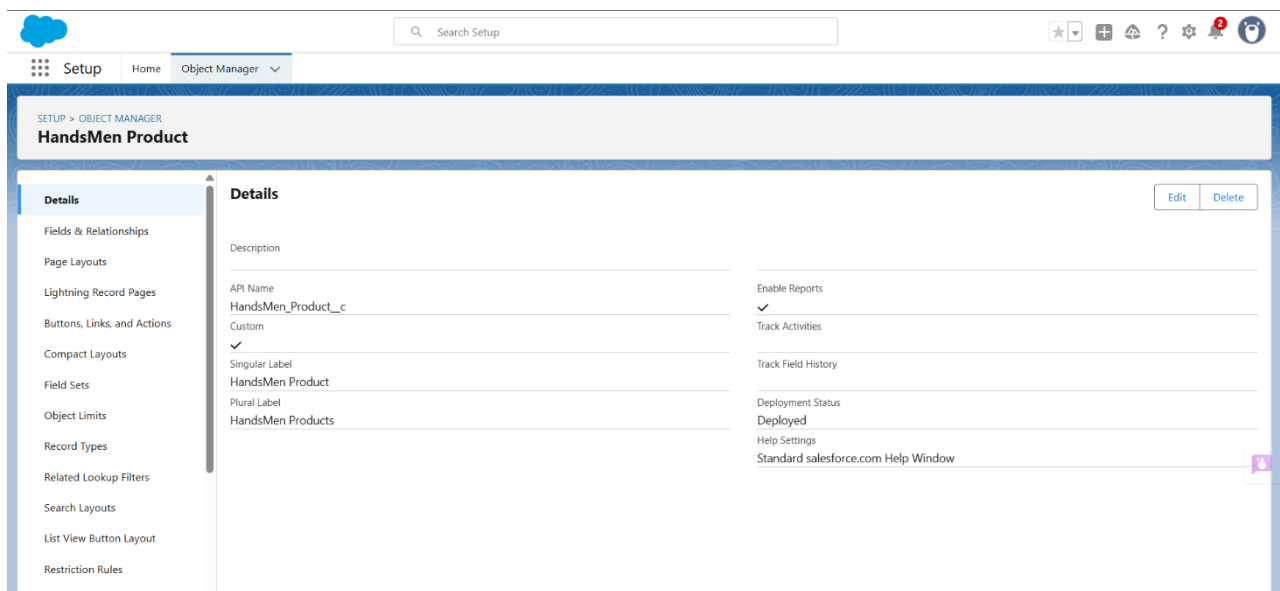
Process followed:

- Navigated to *Object Manager* in Setup → Clicked *Create* → *Custom Object*

- Filled in object names and enabled reporting/searchability

- Created corresponding tabs for easy navigation

3. Lightning App Configuration

A custom Lightning App titled *HandsMen Threads* was created to consolidate business functions. It included tabs for Customers, Products, Orders, Inventory, Campaigns, and Reports. The app was assigned to the System Administrator profile for full access.

4. Validation Rules for Data Accuracy

Validation logic was added to prevent incorrect entries:

- In the **Order** object, saving is restricted if the total amount is zero.
  Error Message: "Please Enter Correct Amount"

- In the **Customer** object, the email field must contain "@gmail.com".
  Error Message: "Please fill Correct Gmail"
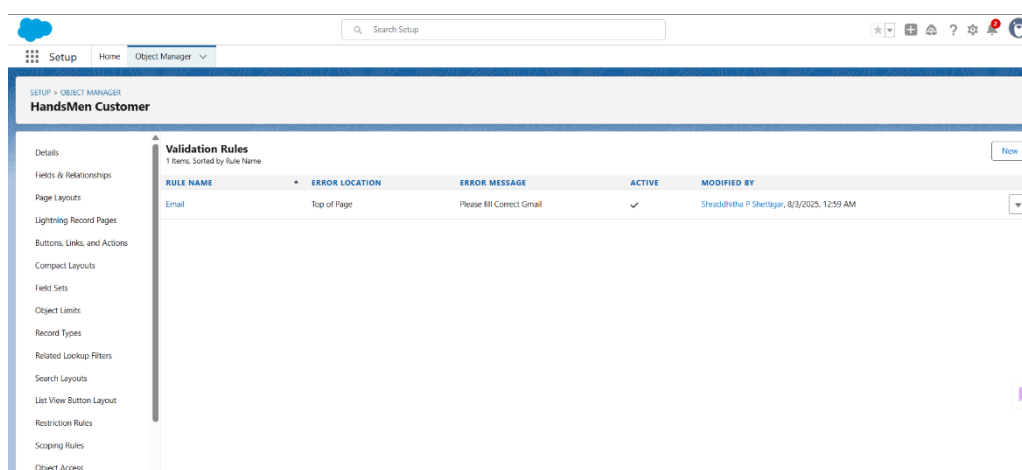
5. Roles & Profile Management

To control access and reflect organizational hierarchy:

- A new profile, *Platform 1*, was created by cloning the standard user profile and granting access to the custom objects.

- Roles were set up for various departments like Sales, Inventory, and Marketing.
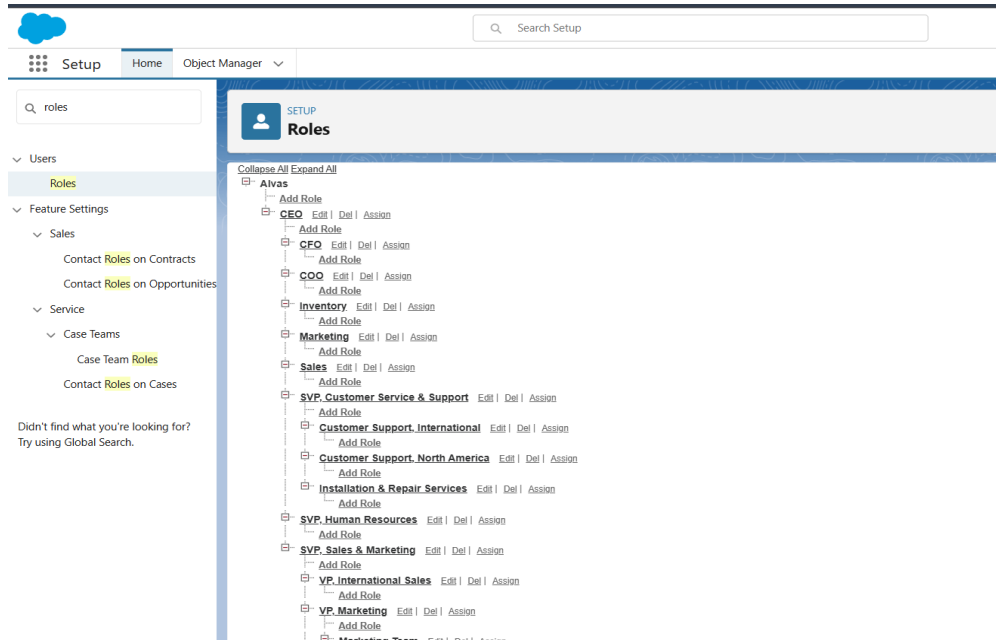
6. User Setup

New users were created and mapped to their respective roles and profiles:

- *Niklaus Mikaelson* was added under the Sales department.

- *Kol Mikaelson* was assigned to the Inventory team.
  These assignments helped maintain role-specific permissions.

7. Email Templates & Alerts

Three key email templates were developed for customer and internal communication:

- **Order Confirmation:** Sent when an order is confirmed.

- **Low Stock Alert:** Sent when inventory drops below 5 units.

- **Loyalty Program Update:** Sent upon changes in customer loyalty tier.

Email alerts were configured using these templates and connected to relevant automation flows.

Setup Home Object Manager

classi

∨ Email
　Classic Email Templates
　Classic Letterheads
∨ Data Classification
　Data Classification Download
　Data Classification Settings
　Data Classification Upload

Didn't find what you're looking for?
Try using Global Search.

SETUP
Classic Email Templates

Text Email Template
Low Stock Alert
Preview your email template below.

Help for this Page

Email Template Detail　　　Edit　Delete　Clone

Email Templates from Salesforce	Unfiled Public Classic Email Templates		
Email Template Name	Low Stock Alert	Available For Use	✓
Template Unique Name	Low_Stock_Alert	Last Used Date	
Encoding	Unicode (UTF-8)	Times Used	
Author	Shraddhitha P Shettigar [Change]		
Description			
Created By	Shraddhitha P Shettigar, 8/3/2025, 1:33 AM	Modified By	Shraddhitha P Shettigar, 8/3/2025, 1:33 AM

Edit　Delete　Clone

Email Template　　　Send Test and Verify Merge Fields

Subject | Low Stock Alert Email
Plain Text Preview

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

Setup Home Object Manager

classi

∨ Email
　Classic Email Templates
　Classic Letterheads
∨ Data Classification
　Data Classification Download
　Data Classification Settings
　Data Classification Upload

Didn't find what you're looking for?
Try using Global Search.

SETUP
Classic Email Templates

HTML Email Template
Loyalty Program Email
Preview your email template below.

Help for this Page

Email Template Detail　　　Edit Properties　Edit HTML Version　Edit Text Version　Delete　Clone

Email Templates from Salesforce	Unfiled Public Classic Email Templates		
Email Template Name	Loyalty Program Email	Available For Use	✓
Template Unique Name	Loyalty_Program_Email	Last Used Date	
Classic Letterhead	Handsmen Threads	Times Used	
Email Layout	Free Form Letter		
Encoding	Unicode (UTF-8)		
Author	Shraddhitha P Shettigar [Change]		
Description			
Created By	Shraddhitha P Shettigar, 8/3/2025, 1:34 AM	Modified By	Shraddhitha P Shettigar, 8/3/2025, 1:34 AM

Edit Properties　Edit HTML Version　Edit Text Version　Delete　Clone

Email Template　　　Send Test and Verify Merge Fields

Subject | Loyalty Program Email
HTML Preview

Congratulations! You are now a

Setup Home Object Manager

classi

∨ Email
　Classic Email Templates
　Classic Letterheads
∨ Data Classification
　Data Classification Download
　Data Classification Settings
　Data Classification Upload

Didn't find what you're looking for?
Try using Global Search.

SETUP
Classic Email Templates

HTML Email Template
Order_Confirmation_Email
Preview your email template below.

Help for this Page

Email Template Detail　　　Edit Properties　Edit HTML Version　Edit Text Version　Delete　Clone

Email Templates from Salesforce	Unfiled Public Classic Email Templates		
Email Template Name	Order_Confirmation_Email	Available For Use	✓
Template Unique Name	Order_Confirmation_Email	Last Used Date	
Classic Letterhead	Handsmen Threads	Times Used	
Email Layout	Free Form Letter		
Encoding	Unicode (UTF-8)		
Author	Shraddhitha P Shettigar [Change]		
Description			
Created By	Shraddhitha P Shettigar, 8/3/2025, 1:32 AM	Modified By	Shraddhitha P Shettigar, 8/3/2025, 1:32 AM

Edit Properties　Edit HTML Version　Edit Text Version　Delete　Clone

Email Template　　　Send Test and Verify Merge Fields

Subject | Your Order has been Confirmed!
HTML Preview

Dear {!HandsMen_Order_c.HandsMen_Customer__c},

8. Automation Using Flows
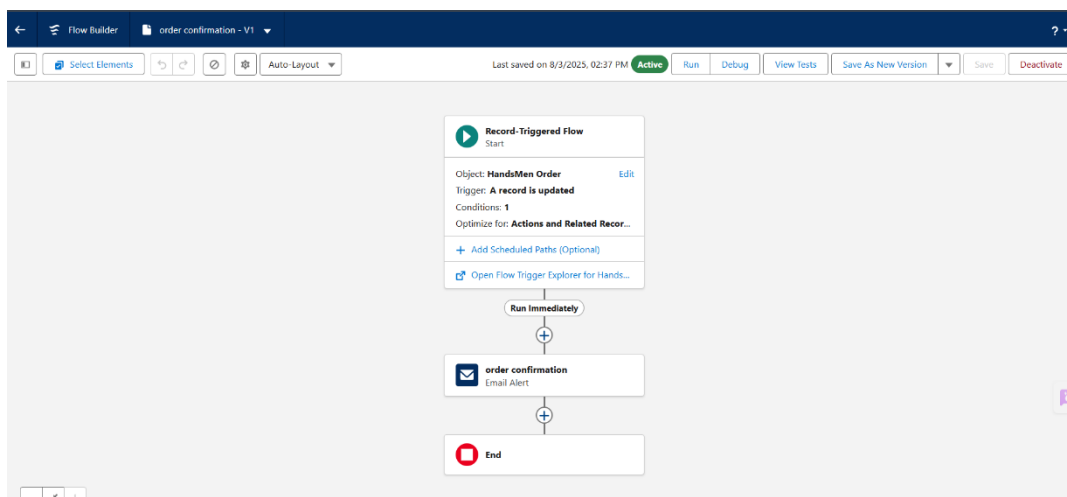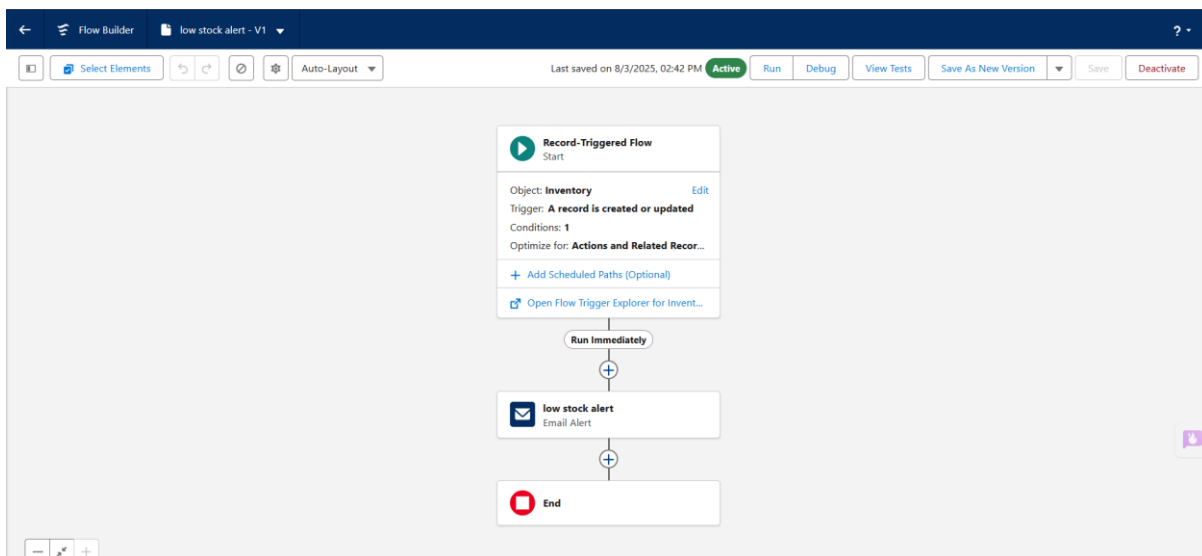
a. Order Confirmation Flow:

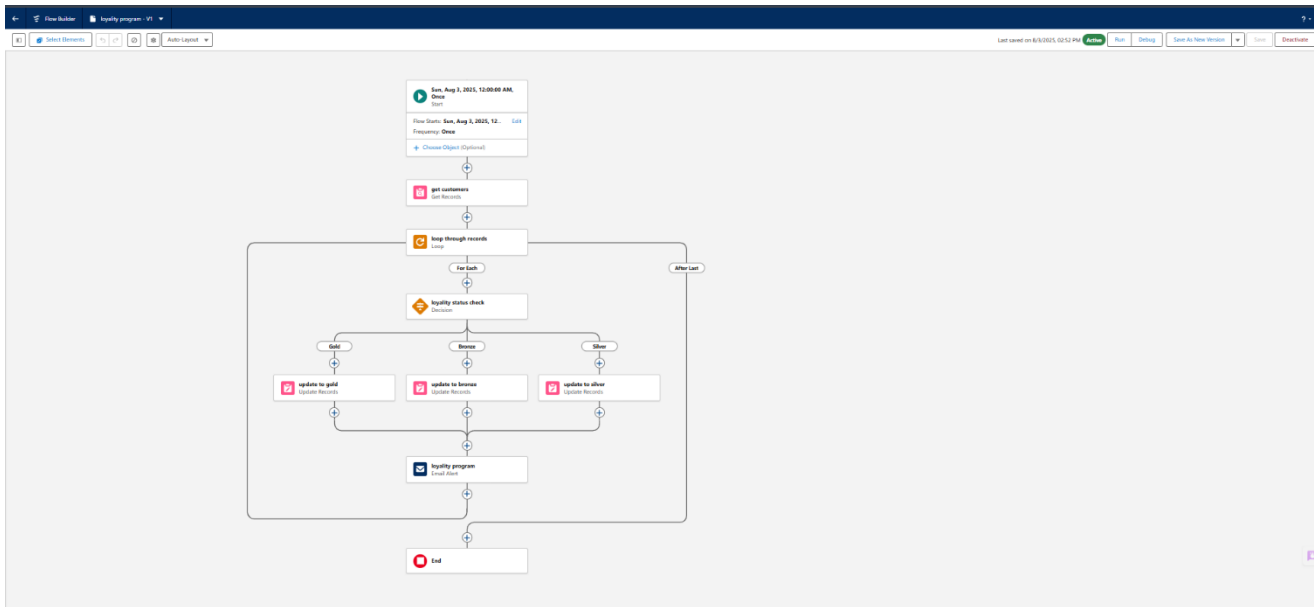Triggers when the order status is changed to "Confirmed", sending an email to the customer.

b. Low Stock Flow:

Activates when the product quantity falls below 5, notifying the inventory manager.

c. Scheduled Loyalty Update Flow:

Runs daily at midnight. It scans all customers and updates their loyalty status based on cumulative purchases.

9. Apex Trigger Logic

- **Order Total Trigger:** Calculates the total amount of the order using quantity and unit price.

- **Stock Adjustment Trigger:** Deducts product stock when an order is successfully placed.

- **Loyalty Evaluation Trigger:** Updates the loyalty level of a customer based on their overall purchase history.


```
1  trigger OrderTotalTrigger on HandsMen_Order__c (before insert, before update) {
2      Set<Id> productIds = new Set<Id>();
3
4      for (HandsMen_Order__c order : Trigger.new) {
5          if (order.HandsMen_Product__c != null) {
6              productIds.add(order.HandsMen_Product__c);
7          }
8      }
9
10     Map<Id, HandsMen_Product__c> productMap = new Map<Id, HandsMen_Product__c>(
11         [SELECT Id, Price__c FROM HandsMen_Product__c WHERE Id IN :productIds]
12     );
13
14     for (HandsMen_Order__c order : Trigger.new) {
15         if (order.HandsMen_Product__c != null && productMap.containsKey(order.HandsMen_Product__c)) {
16             HandsMen_Product__c product = productMap.get(order.HandsMen_Product__c);
17             if (order.Quantity__c != null) {
18                 order.Total_Amount__c = order.Quantity__c * product.Price__c;
```

PROJECT OVERVIEW WITH PRACTICAL SCENARIO

1. Customer Onboarding

A new customer, *Elijah Mikaelson*, visits a retail store or online portal.

- In Salesforce: A record is added to the **Customer** object with details like name, phone number, and email.

- **Validation Rule**: Ensures that the email format is correct (e.g., must include @gmail.com).

2. Product Configuration

An admin enters product details such as *Shirts* and *Jeans* into the **Product__c** custom object.

- Each product includes price and description.

- Inventory records are maintained for each product to track available stock.

3. Order Creation

Elijah places an order for 2 shirts, each priced at ₹500.

- In Salesforce: An entry is made in the **Order** object.

- **Apex Trigger**: Automatically calculates the total as 2 x ₹500 = ₹1000 and stores it in the record.

4. Inventory Adjustment

Once the order is confirmed:

- **Apex Trigger on Inventory**: Automatically deducts 2 units from the shirt stock.

- **Validation Rule**: Prevents stock quantity from dropping below zero.

5. Loyalty Status Evaluation

With a total purchase of ₹1000:

- A trigger runs on the **Customer** object to evaluate loyalty level.

- Based on total purchase value:

    o   Below ₹2500 – Bronze

    o   ₹2500 to ₹21000 – Silver

    o   Above ₹21000 – Gold

- Elijah is assigned *Silver* status based on his purchase.

6. Email Notification System

Whenever an order is created or the loyalty level changes:

- A **Flow** combined with an **Email Alert** is triggered.

- Elijah receives an email:

"Thank you for your order! Your loyalty level is now Silver."

7. Role-Based User Management

Store employees are created as Salesforce users:

- *Niklaus Mikaelson* – Assigned Sales Role with Platform User Profile.

- *Kol Mikaelson* – Assigned Inventory Role with relevant permissions.

CONCLUSION

The Salesforce-based CRM solution developed for HandsMen Threads effectively enhances and automates crucial business functions such as customer management, product listing, order handling, inventory control, and loyalty program execution. By utilizing Salesforce features like Custom Objects, Apex Triggers, Validation Rules, Flows, and Email Alerts, the system ensures streamlined operations, real-time data accuracy, and improved customer engagement. With a well-defined role structure and automated workflows, the platform reduces manual tasks, enhances operational efficiency, and delivers valuable insights for business growth.