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

Abstract

This project details the implementation of a tailored Salesforce CRM solution for *HandsMen Threads*, a premium men's fashion and bespoke tailoring brand. Aimed at modernizing operations and enhancing customer-centric services, the solution streamlines key business functions while ensuring data consistency and cross-departmental collaboration. Central to the system is a robust data model built on five custom objects—**Customer**, **Order**, **Product**, **Inventory**, and **Marketing Campaign**—enabling structured data capture and relationship management.

Advanced automation was integrated using **Record-Triggered Flows**, **Scheduled Flows**, **Email Alerts**, and **Apex**, allowing seamless execution of tasks such as order confirmations, dynamic loyalty status updates, and proactive low-stock notifications. To uphold data integrity and security, the implementation includes strict **validation rules** and a **role-based access model** tailored to the Sales, Inventory, and Marketing departments.

A scheduled **Apex batch job** further enhances operational accuracy by continuously updating stock levels based on real-time inventory data. Overall, this end-to-end CRM solution not only elevates the customer experience through personalized communication but also drives internal efficiency and establishes a scalable, future-ready digital infrastructure on the Salesforce Platform.

Objective

The primary objective of this project is to design and implement a customized Salesforce CRM solution for *HandsMen Threads*—a premium men's fashion and tailoring brand—with the goal of optimizing core business operations, ensuring data accuracy, and elevating overall customer satisfaction.

By building a centralized and scalable CRM system to manage **Customers**, **Orders**, **Products**, **Inventory**, and **Marketing Campaigns**, the project focuses on achieving the following outcomes:

- **Automate essential business processes**, including order confirmations, loyalty tier updates, and low-stock alerts, to reduce manual effort and improve response time.

- **Ensure data accuracy and consistency** through the application of validation rules that govern clean and reliable data entry.

- **Provide real-time visibility** into customer interactions and inventory levels, enabling faster decision-making and proactive service.

- **Enhance cross-functional collaboration** by implementing role-based access controls for the Sales, Inventory, and Marketing teams.

- **Deliver personalized customer experiences** through targeted communication strategies and loyalty program integration, driving engagement and long-term retention.

Technology Description

Salesforce:

Salesforce was used as the core CRM platform, offering cloud-based customization capabilities to design a scalable, automated solution. It enabled object-based data modeling, secure access control, process automation, and Apex development for advanced business logic execution.

Custom objects:

Five key custom objects were created to support the business model of HandsMen Threads:

- **Customer** – Stores customer profile details, email, loyalty status, and interaction history.

- **Order** – Captures order information including order status, total amount, and related customer/product.

- **Product** – Defines available products with attributes like name, category, and price.

- **Inventory** – Tracks stock quantity per product and warehouse details.

- **Marketing Campaign** – Manages promotional campaigns and their target audiences.

Tabs:

Custom tabs were created for each of the five custom objects to allow easy navigation and data entry through the Lightning App interface.

Custom app:

A Lightning app named HandsMen Threads was developed to provide users a centralized workspace. It includes tabs for Customers, Orders, Products, Inventory, Campaigns, Reports, and Dashboards, all tailored to support daily business operations.

Profiles:

A custom profile, cloned from the Standard User profile, was created to define baseline access for users. This profile restricts or grants access to objects, fields, and app features based on user roles.

Roles:

A role hierarchy was established to reflect departmental structure:

- **Sales Manager** – Full access to Orders and Customers.

- **Inventory Manager** – Can manage Products and Inventory.

- **Marketing Executive** – Access to Campaign data and customer insights for targeting.

Permission set:

A permission set named Permission_Platform_1 was created to grant additional privileges (like edit/delete access to specific objects) beyond what is allowed in the default profile. This ensures flexibility and security in managing user roles.

Validation rules:

To maintain data integrity, several validation rules were implemented:

- Preventing order placement with non-positive amounts.

- Blocking negative stock entries in Inventory.

- Restricting customer email fields to only allow Gmail domain entries.

Email Templates:

Three email templates were designed to support business communication:

1. **Order Confirmation Template** – Sent to customers after successful order confirmation.

2. **Low Stock Alert** – Notifies inventory managers when stock levels are low.

3. **Loyalty Program Message** – Personalized messages for high-value customers.

Email Alerts:

Email alerts were configured and triggered via Flows:

- Order confirmation alert to customers.

- Low inventory alerts to warehouse team.

- Loyalty program communication based on customer purchase history.

Flows:

Automation was achieved through both Record-Triggered and Scheduled Flows:

- **Record-Triggered Flows:**
  - o Send confirmation email upon order submission.
  - o Notify inventory team when stock falls below threshold.
- Scheduled Flow:
  - o Periodically update customer loyalty status based on cumulative purchases.

Apex:

Custom Apex was implemented for advanced logic and batch processing:

- **Apex Trigger:** Validates order quantity based on current stock at time of order.
- **Apex Batch Job:** A scheduled batch class updates stock quantities and flags items needing restock, running daily to support inventory accuracy.
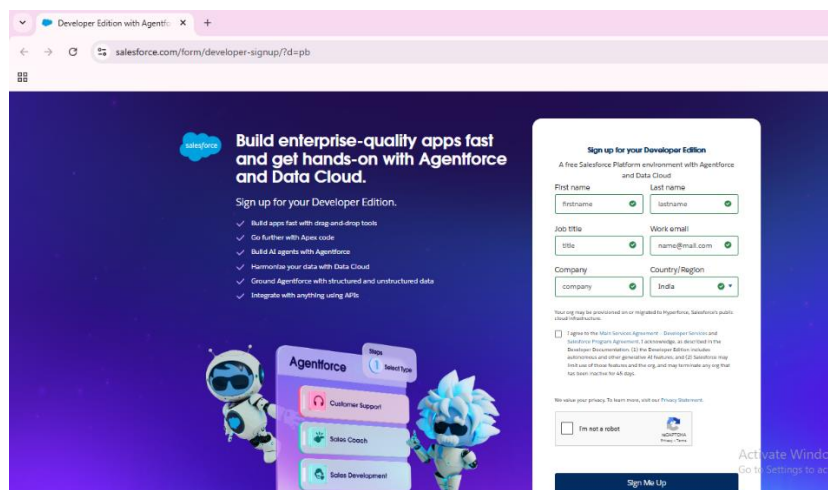
Detailed Execution Of Project Phases

1.Developer Org Setup

A free **Salesforce Developer Edition Org** was created from developer.salesforce.com.

Basic configurations were completed:

- Email deliverability: set to **All Emails**
- Enable Lightning Experience and App Builder
- Activate custom domain for branding and security

2. Custom Object Creation

The project required a structured data model tailored to HandsMen Threads' business needs. Five custom objects were created:

- Customer – To capture personal details, preferences, and loyalty status.

- Order – To log purchase details like order date, amount, and items ordered.

- Product – To store product catalog data including product type, SKU, and pricing.

- Inventory – To monitor stock levels, product availability, and restocking triggers.

- Marketing Campaign – To plan and track promotional activities and target outreach.
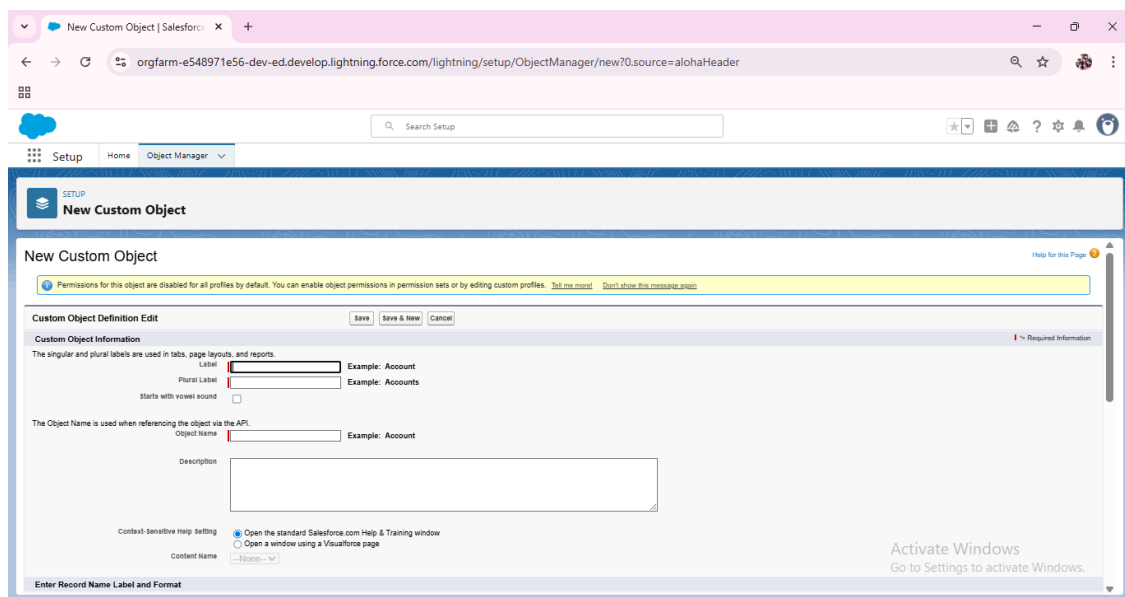
Steps to Create a Custom Object

1. Go to Setup > Search for Object Manager

2. Click Create > Custom Object

3. Enter:

   o Label: Customer (or relevant name)

   o Plural Label: Customers

   o Record Name: Keep default or customize

4. Check Launch New Custom Tab Wizard if you want to create a tab

5. Save the object

6. Add custom fields like Email, Loyalty Status, Total Purchases, etc.

Repeat the process for the remaining four objects.

3.Creating the ligtning app

- A custom app named HandsMen Threads was built using the App Manager.

Steps to Create a Lightning App

1. Go to Setup > App Manager

2. Click New Lightning App

3. Enter:

   o App Name: HandsMen Threads

   o App Branding: Choose icon and color

4. Add the custom tabs: Customer, Order, Product, Inventory, Marketing Campaign

5. Assign visibility to selected user profiles.
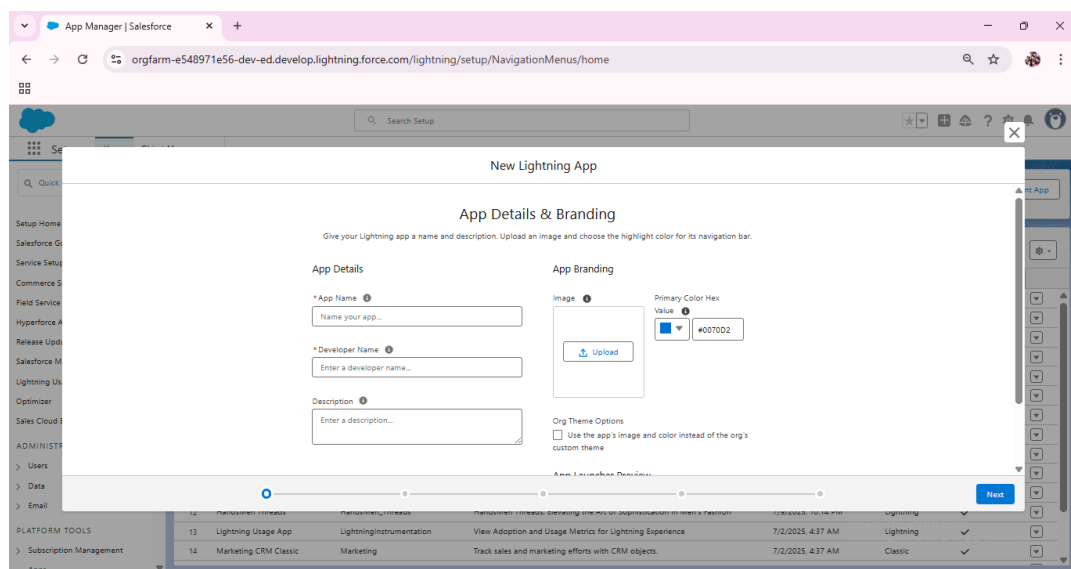
4. Validation Rules

Validation rules were applied to ensure accurate data entry and to enforce business logic.

Examples

- Prevent saving an order if stock is 0

- Ensure customer email is filled

- Restrict invalid loyalty status values

Steps to Create a Validation Rule

1. Go to Object Manager > [Select Object] > Validation Rules

2. Click New

3. Enter Rule Name and Formula (e.g., ISBLANK(Email))

4. Enter custom error message

5. Save & Activate
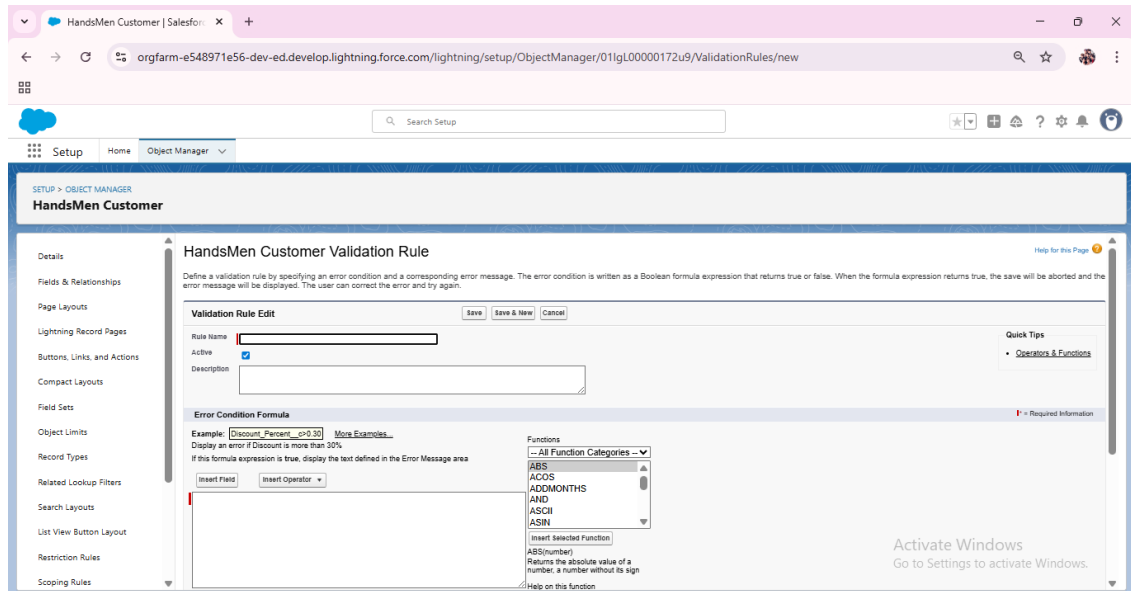
5.User Role and Profile Setup

Three main roles were defined based on department hierarchy:

- Sales Executive

- Inventory Manager

- Marketing Analyst

Each role was mapped to custom profiles with specific object-level and field-level permissions.

Steps to Set Up Roles

1. Go to Setup > Roles > Set Up Roles

2. Click Add Role, assign parent role if needed

3. Name the role and assign users

Steps to Customize Profiles

1. Go to Setup > Profiles

2. Clone Standard User to create a custom profile
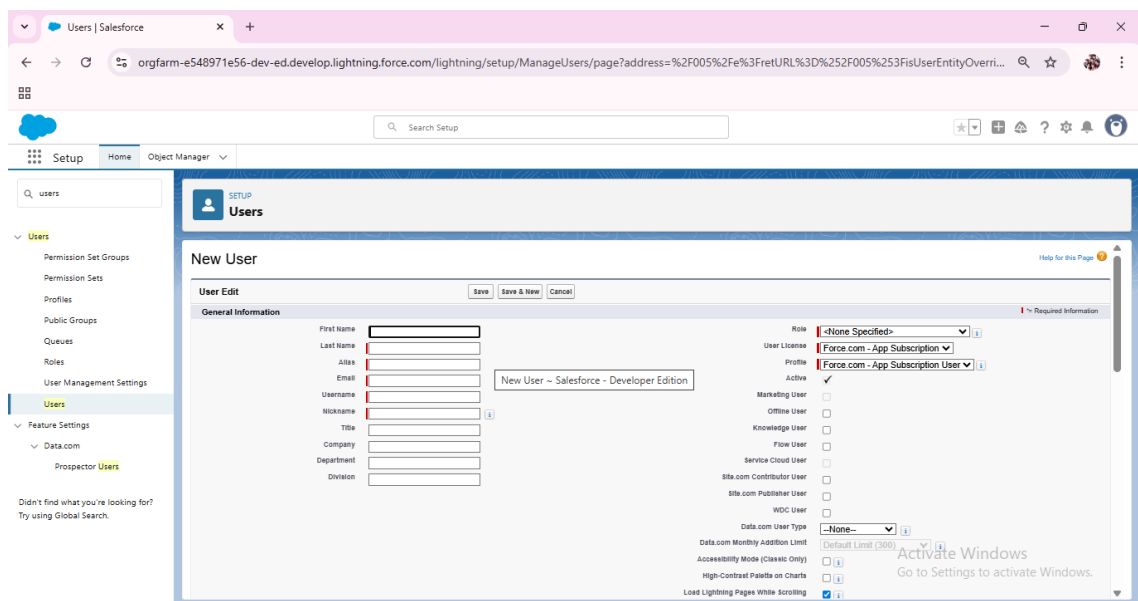
3. Modify object/field-level access and permissions
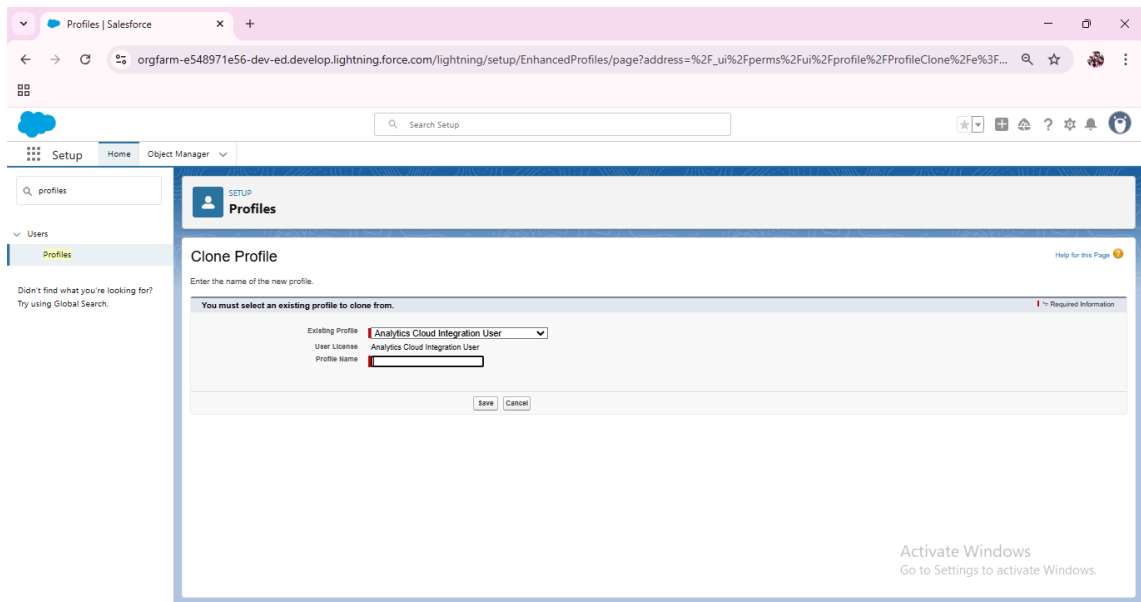
6. User Creation

Test users were created for each department with assigned roles and profiles.

Steps to Create Users

1. Go to Setup > Users

2. Click New User

3. Enter user info, assign the appropriate role and profile
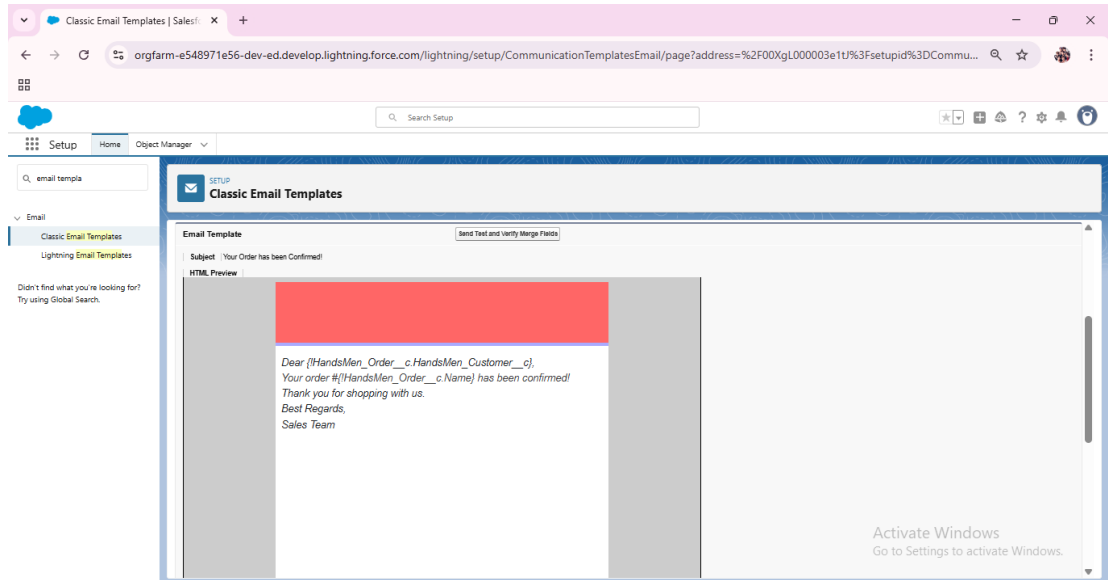
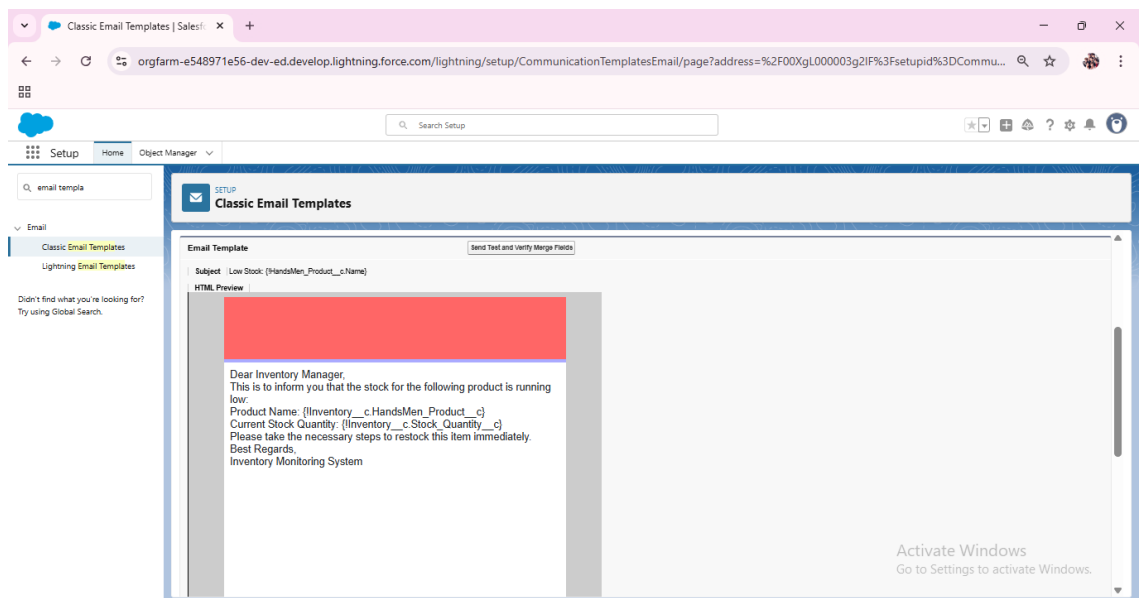4. Save and verify email functionality

7.Email Templates & Alerts

Custom email templates were designed and used in flows and triggers.
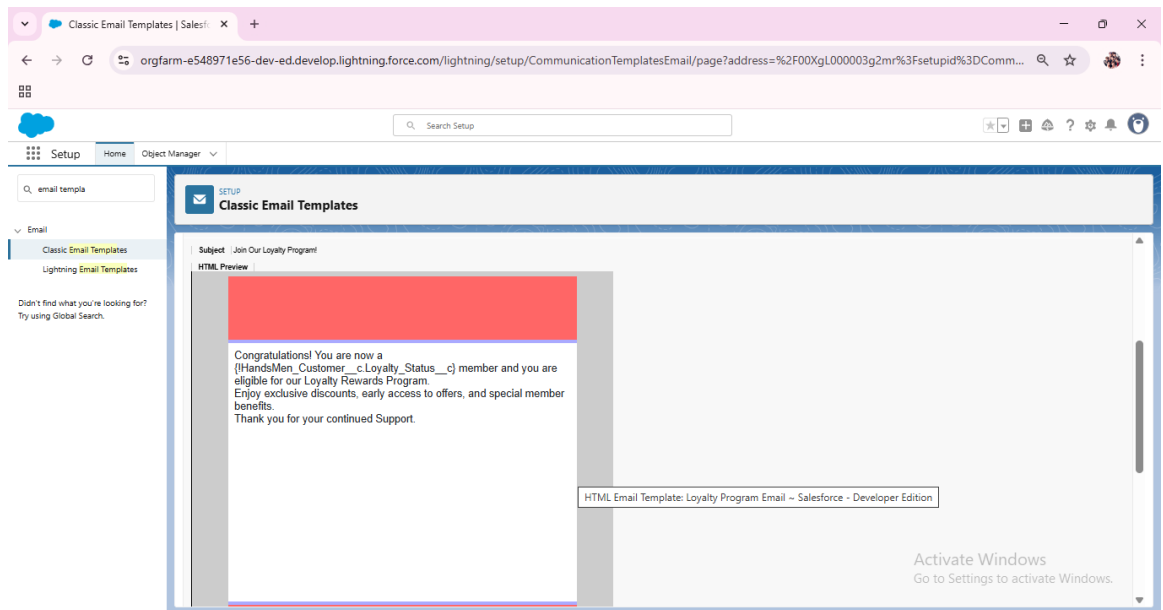
Templates Created

- **Order Confirmation**

- **Low Stock Alert**
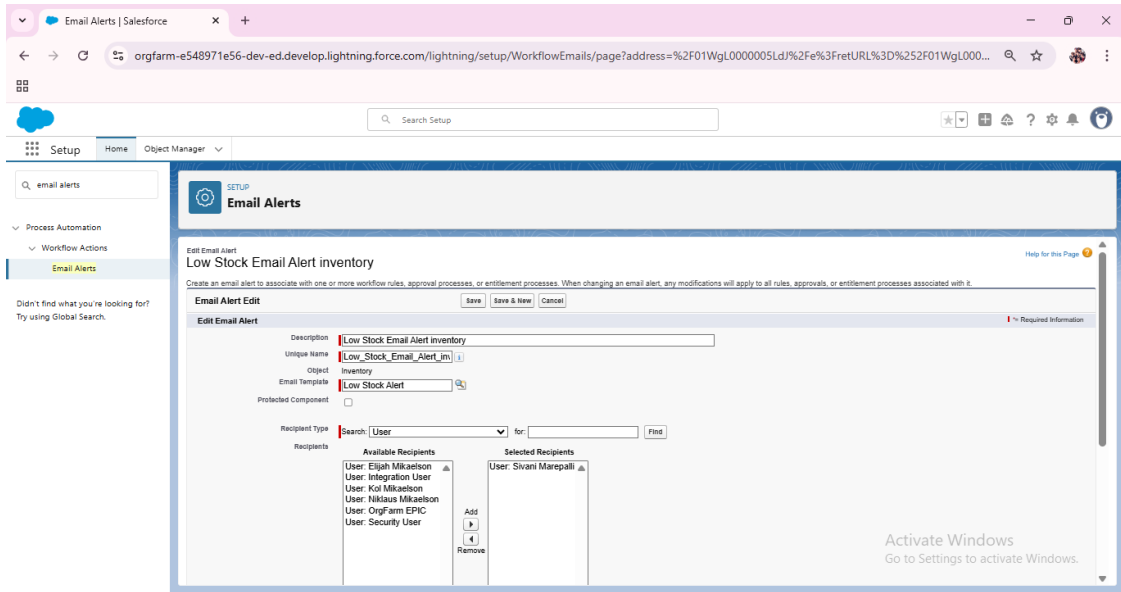

- **Loyalty Status Program**

Steps to Create Email Templates
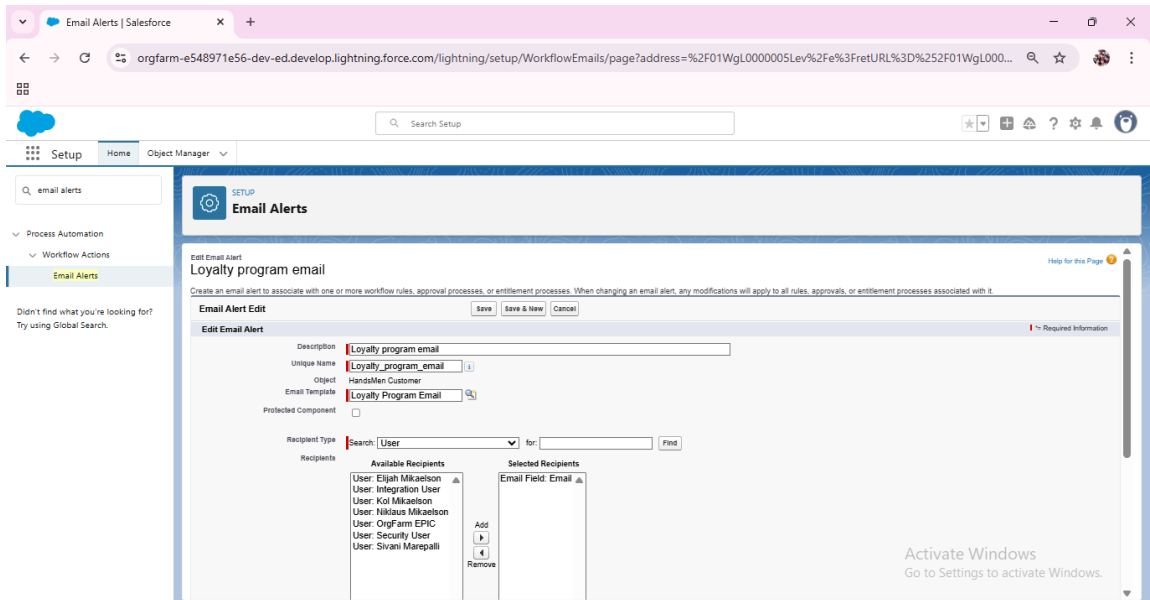
1. Go to App Launcher > Email Templates

2. Click New Email Template

3. Enter:

   o Name

   o Subject

   o Email Body using merge fields like {!Customer.Name}

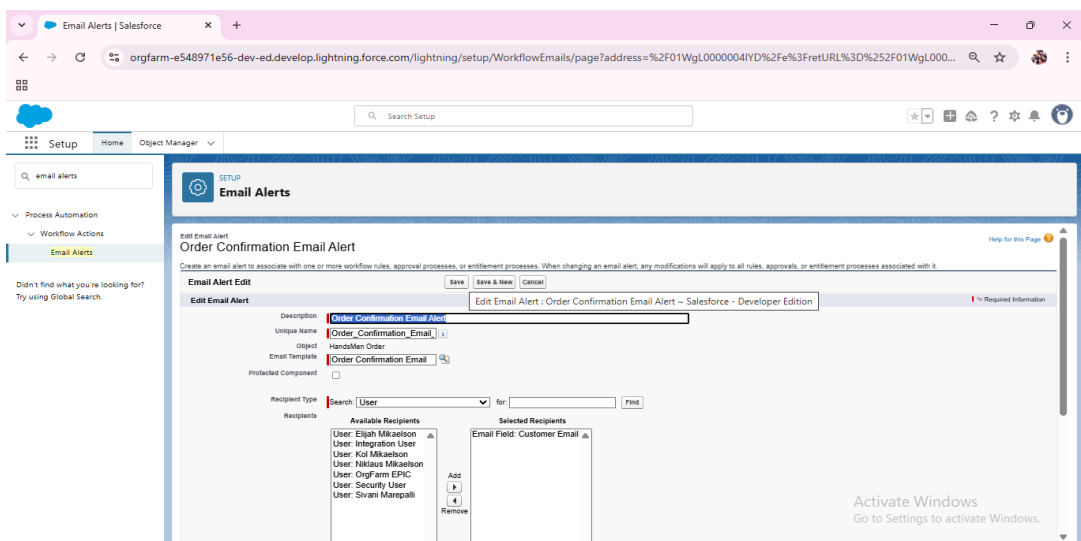4. Save the template.

Steps to Create Email Alerts

1. Go to Setup > Email Alerts

2. Click New Email Alert

3. Choose object, template, and recipient

4. Use this in a Flow or Workflow

1. **Low Stock Email Alert:**

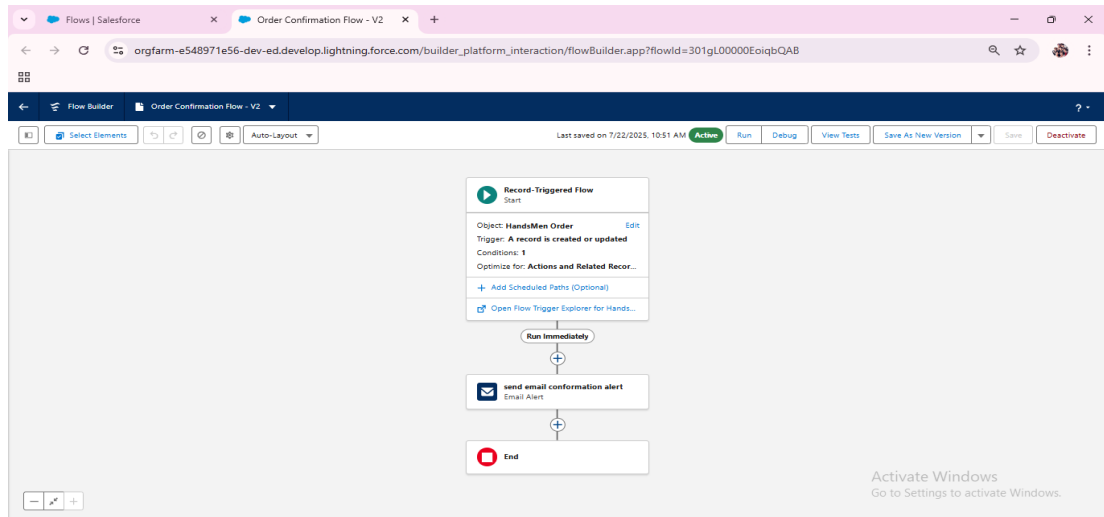## 2. Loyalty Program Email Alert:

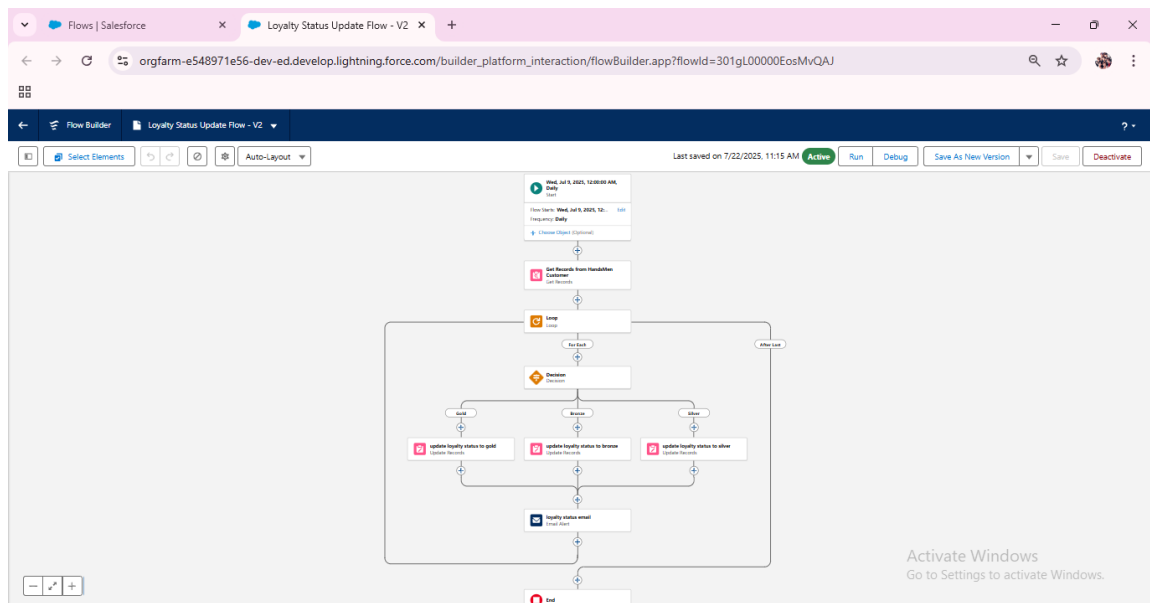## 3. Order Confirmation Email Alert:

8.Flow Implementation

Several Record-Triggered and Scheduled Flows were built:
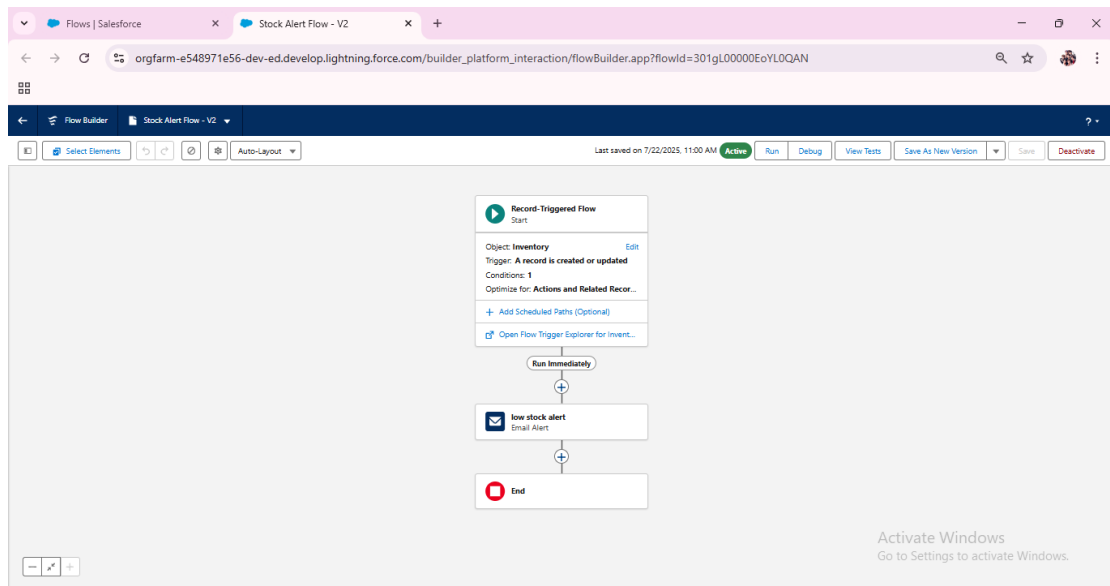
- **Order Confirmation Flow:** Sends an email when a new order is placed.

- **Loyalty Status Program Flow:** Updates the customer loyalty status based on purchase history.

- **Low Stock Alert Flow:** Scheduled daily to check inventory levels and send alerts if stock is low.

Steps to Create a Flow

1. Go to Setup > Flows

2. Click New Flow > Choose Record-Triggered Flow or Scheduled

3. Configure:

   o Object (e.g., Order, Inventory)

   o Trigger condition

   o Add Get Records, Update Records, and Send Email Alert

4. Debug, Save, and Activate

9.Apex Triggers

To handle complex logic not achievable through flows:

- An **Apex Trigger** was created on the Order object to:

   o Validate stock availability before confirming an order.

   o Automatically reduce inventory quantity based on ordered products.

- A **Scheduled Apex Batch Job** was written to:

   o Run daily

   o Identify products with low stock levels

   o Notify inventory managers via email alert.

Project Explanation With Real-World Example

Scenario:

A customer places an order on the HandsMen Threads website. Behind the scenes, the Salesforce CRM system manages the order, triggers stock updates, sends confirmation emails, and helps the marketing team build customer loyalty.

1. Sales Executive View – Creating a New Order

1. Login into Salesforce → HandsMen Threads Lightning App

2. Click on the **"Customers"** tab.

3. Search or create a new customer:

- **Name:** Arjun Sharma

- **Email:** arjun.sharma@gmail.com

- **Phone:** 0123958746

- Click **Save**.

4. Go to the **"Orders"** tab → Click **New Order**.

- **Customer:** Arjun Sharma

- **Order Date**: 30 July 2025

- **Status:** Confirmed

- Add **Order Line Items**:

- **Product:** Navy Blue Blazer

- **Quantity:** 2

- Click **Save**

5. Immediately after saving:

- The **Order Confirmation Email** is sent (via Flow + Email Alert).

- An **Apex Trigger** updates inventory by reducing the blazer stock by 2 units.

2. Inventory Manager View – Monitoring Stock

1. Click on "Inventory" tab → View all inventory levels.

2. See that Navy Blue Blazer stock has reduced.

3. If the quantity drops below the minimum threshold (e.g., 5 units):

- A Low Stock Alert Email is triggered to the Inventory Manager (via Flow).

4. Inventory Manager opens Warehouse tab to check where the product is stored.

5. They can initiate restocking from the supplier via a manual or automated process (next phase idea).

3. Marketing Analyst View – Engaging the Customer

1. Click on **"Customers"** tab → Search for "Arjun Sharma".

2. See full interaction history:

- Orders placed

- Total purchase value

- Loyalty points (if a field was added)

3. Click on the **"Campaigns"** tab → Add Arjun to a **"Festive Offers Campaign"**.

4. Use an **Email Template** to send him a personalized offer:

- *"**Thanks for your recent purchase! Here's 10% off your next order.***"*

OUTPUT
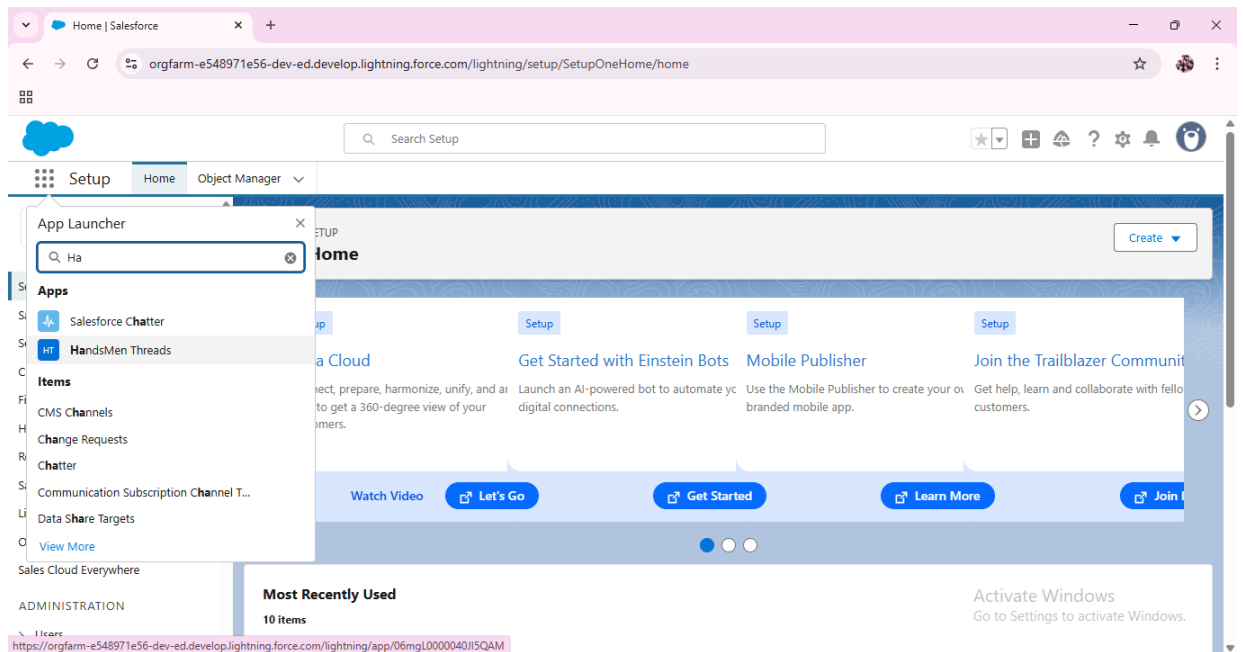
Fig 1: HandsMen Tread App in App Launcher
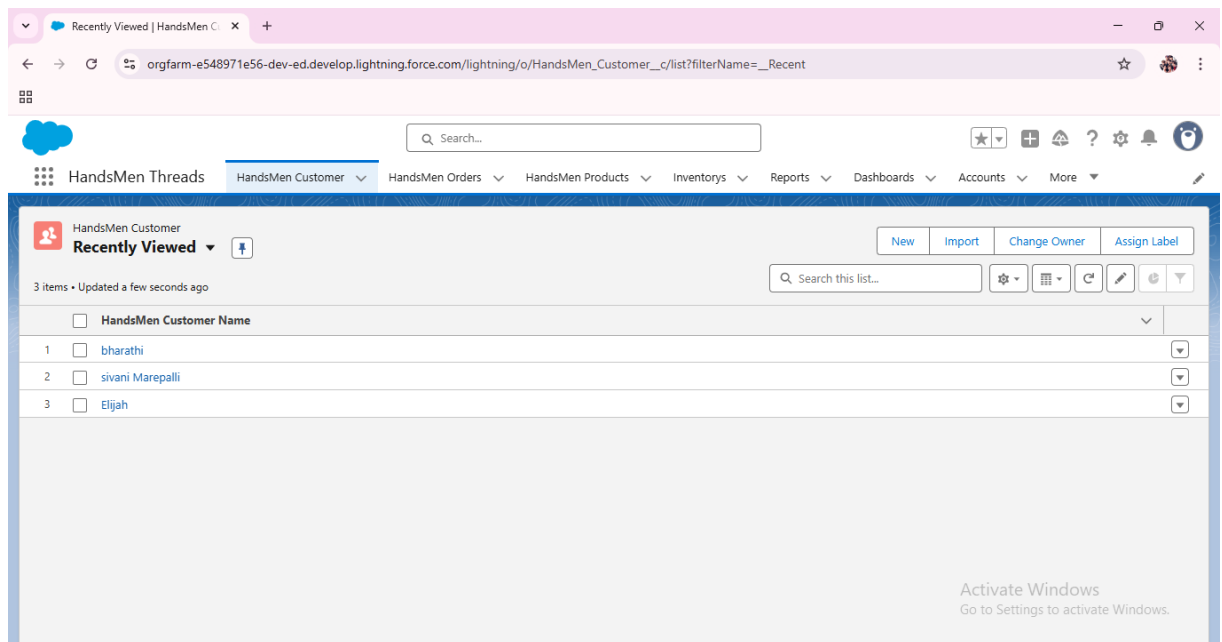
Fig 2: HandsMen Thread App

Fig 3: Create New HandsMen Thread Customer

Fig 4: Create New HandsMen Thread Order
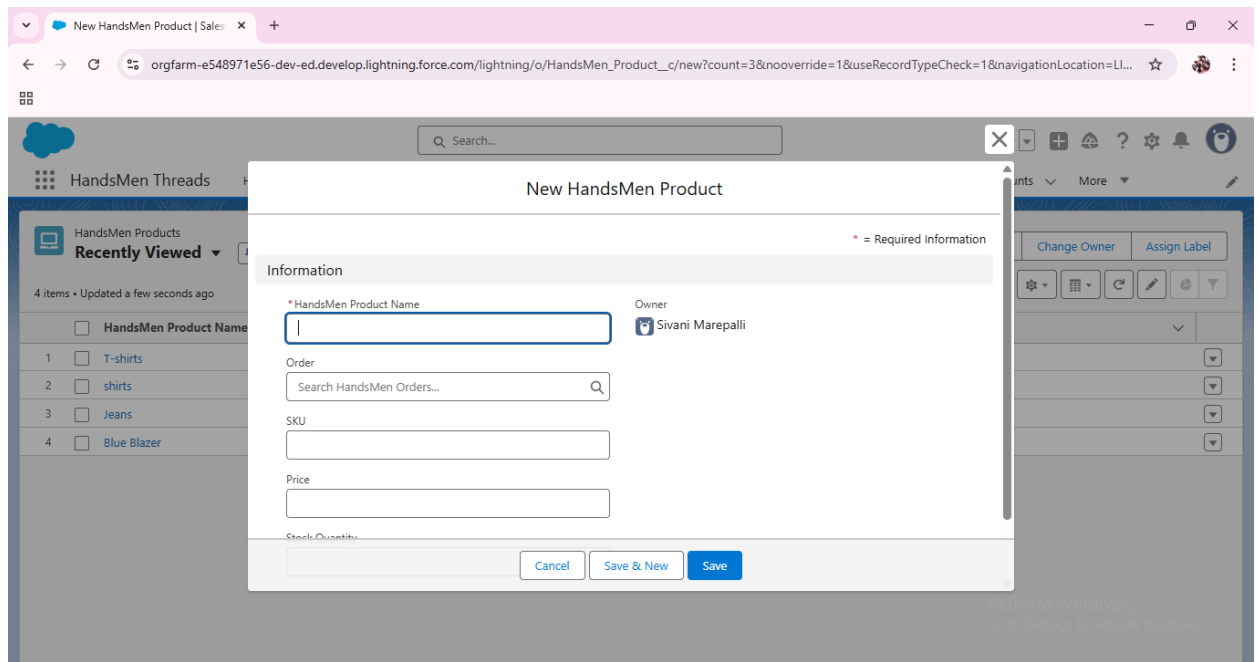
Fig 5: Create New HandsMen Thread Product
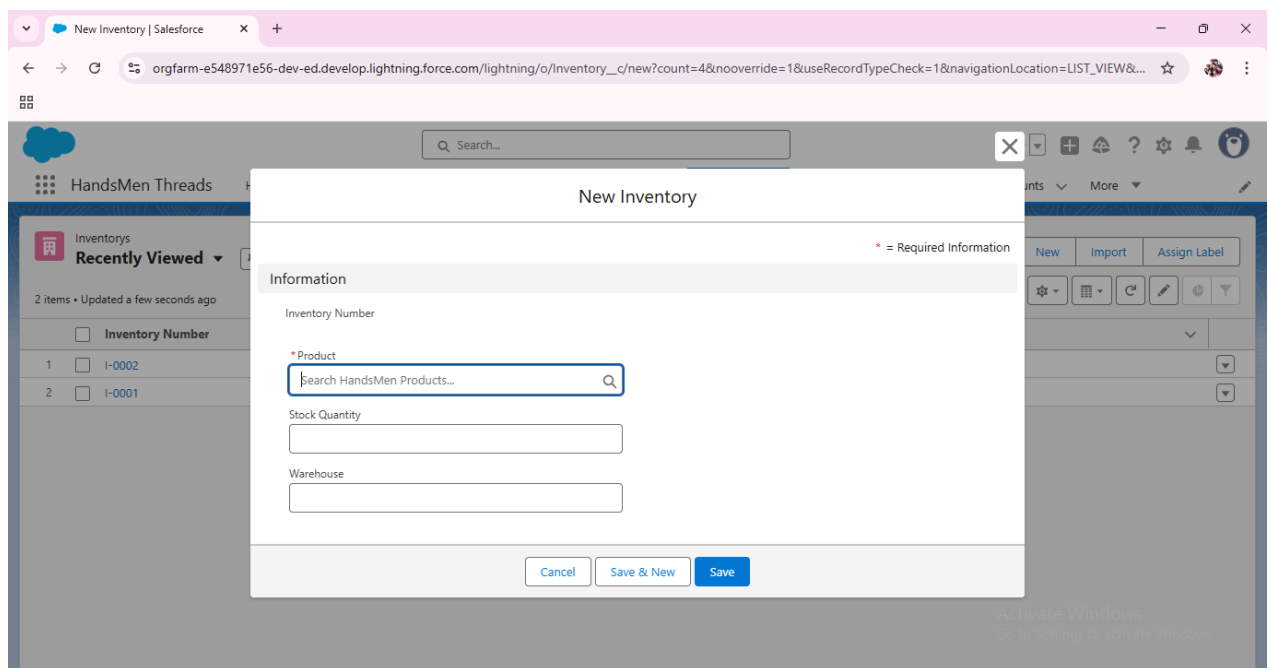
Fig 6: Create New Inventory For HandsMen Thread App

Fig 7: Create New Marketing Campaign For HandsMen Thread

Fig 8: Order Confirmation Email Generated through Flow

Low Stock: Inbox ×

Sivani Marepalli via e5efoxm9jd66.gl-6udcuua4.can98.bnc.salesforce.com

to me ▾

Sun 20 Jul, 10:13 (10 days

Dear Inventory Manager,

This is to inform you that the stock for the following product is running low:

Product Name:

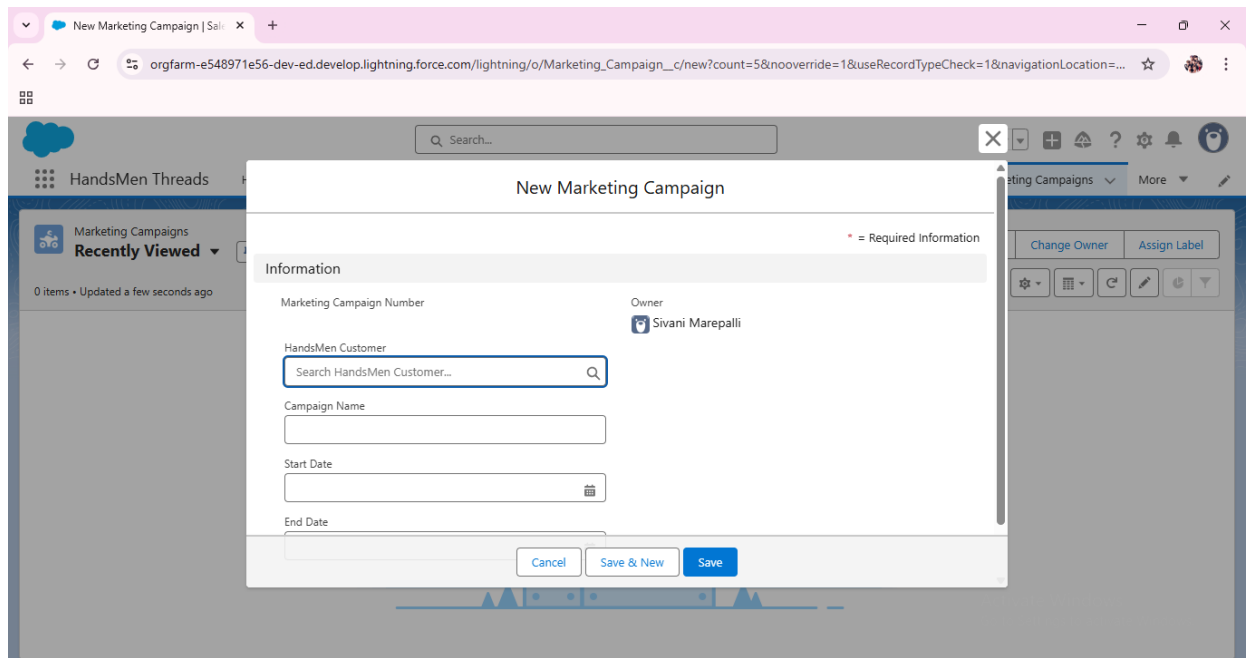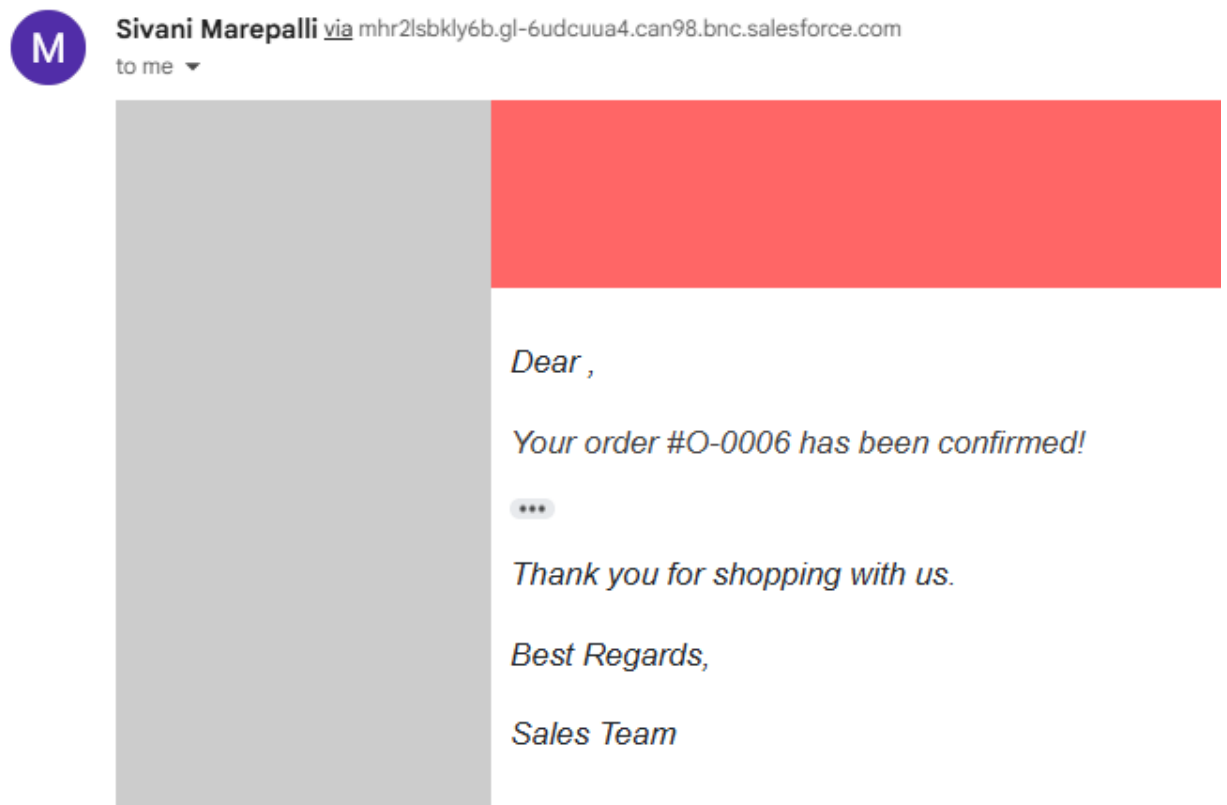Current Stock Quantity:

Please take the necessary steps to restock this item immediately.

Best Regards,

Inventory Monitoring System
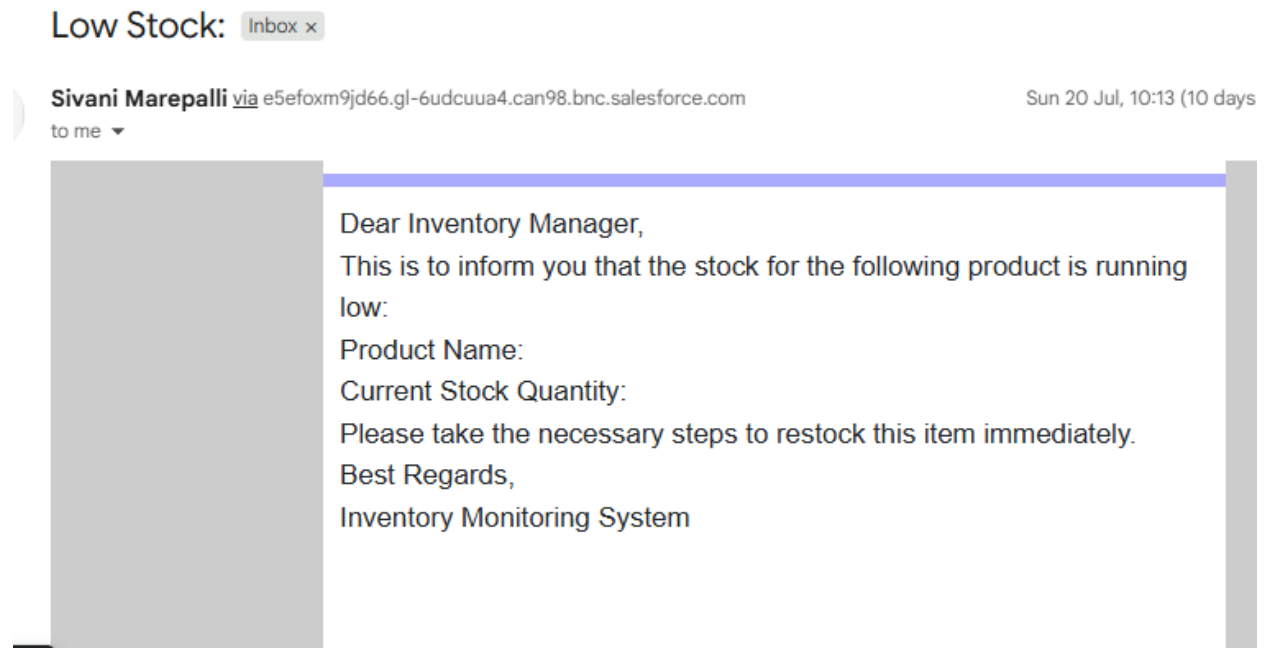
Fig 9: Low Stock Email Generated through Flow

Join Our Loyalty Program! Inbox ×

Sivani Marepalli via gc1jbfdshbigjr.gl-6udcuua4.can98.bnc.salesforce.com

to me ▾

Sun 20 Jul, 10:20 (10

Congratulations! You are now a member and you are eligible for our Loyalty Rewards Program.

Enjoy exclusive discounts, early access to offers, and special member benefits.

Thank you for your continued Support.
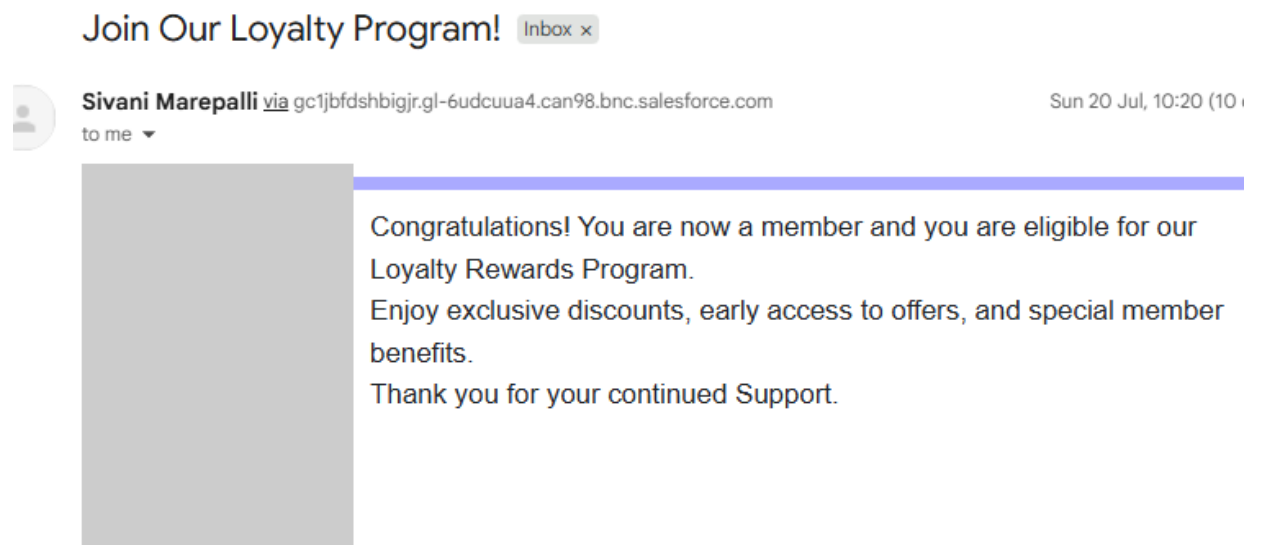
Fig 10: Loyalty Status Email Generated through Flow

Conclusion

The HandsMen Threads Salesforce CRM Implementation has proven to be a transformative solution for managing the critical aspects of a fashion retail business from customer engagement and order processing to inventory control and personalized marketing. By leveraging Salesforce's powerful platform capabilities, the project successfully automates workflows, enhances data visibility, and empowers different roles (Sales Executives, Inventory Managers, and Marketing Analysts) to collaborate efficiently within a unified digital ecosystem.

The seamless integration of custom objects, automated flows, validation rules, Apex triggers, and batch processing ensures operational accuracy and consistency across departments. Order confirmation emails, real-time stock adjustments, and low-stock alerts demonstrate how automation reduces manual errors and accelerates response times. Moreover, the system enables data-driven decision-making by tracking customer behavior, purchase history, and campaign participation leading to more meaningful and targeted interactions.

This implementation not only elevates the customer experience but also aligns closely with the brand's identity delivering sophistication, reliability, and responsiveness at every customer touchpoint. The project is a robust example of how Salesforce can serve as the digital backbone of a fashion enterprise aiming for growth, efficiency, and long-term customer loyalty.

Future Scope

While the current implementation lays a strong foundation, several enhancements can further elevate the system:

1. **Integration with E-commerce Platform**

   o   Connect the Salesforce CRM directly with the HandsMen Threads online store to enable real-time sync of customer orders and stock updates.

2. **Automated Restocking via Suppliers**

   o   Introduce an approval flow that automatically generates Purchase Orders to suppliers when stock falls below the threshold.

3. **Loyalty Points System**

   o   Extend the Customers object to track loyalty points and redemption history, and automate loyalty rewards using scheduled Apex jobs.

4. **AI-Powered Product Recommendations**

   o   Use Salesforce Einstein to analyze customer purchase patterns and suggest personalized product recommendations.

5. **Enhanced Reporting and Dashboards**

- Create custom dashboards for executives and analysts to view real-time KPIs such as top-selling products, monthly revenue, and customer lifetime value.

6. **Mobile Access**

- Enable mobile access for sales reps to view and create customer records or orders on the go using the Salesforce mobile app.

7. **Multi-Warehouse and Multi-Currency Support**

- Expand the data model to support global operations, multiple warehouses, and transactions in various currencies.