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

ABSTRACT

This collaboration is all about creating a Salesforce CRM application named HandsMen Threads that will be able to keep records of customer information, product details, stock, orders, and marketing activities. The application will be built upon the platform features such as custom objects, validation rules, Apex Triggers, and Salesforce Flows. The flow of the whole process will be automated, and at the same time, the data entry will be reliably controlled by the application. To help users navigate easily, a tailored Lightning App will be made available, while reports and dashboards will provide comprehensive views of sales and inventory performance. To sum up, HandsMen Threads is a proof of concept showing that Salesforce can be used to build an efficient and friendly business management solution at the same time.

OBJECTIVE

The purpose of this project is to design and execute a tailor-made CRM system for HandsMen Threads that will effectively manage enterprise data, reduce human involvement in repetitive tasks, and ensure that the business runs smoothly. The specific objectives of the project include:

- creating custom entities that will enable the management of customers, products, orders, and stock
- developing a Lightning App that will be the hub for all major tabs and functionalities
- applying validation rules to ensure the correctness and uniformity of data
- utilizing Apex Triggers and Salesforce Flows to carry out process automation for activities such as updating and notifying stock levels
- creating reports and dashboards that will present business insights in an easy-to-understand manner
- illustrating how Salesforce capabilities can make processes more efficient and less dependent on manual work

TECHNOLOGY DESCRIPTION

Salesforces

Salesforce is a Customer Relationship Management (CRM) system that is delivered as a service (SaaS) and supports businesses in handling customer data, automating processes, monitoring sales and marketing activities, and overall increasing efficiency and making better decisions.

Custom Object

Salesforce's custom objects are similar to database tables designed for the storage and management of company-specific data, such as customers, products, orders, or stock.

- Customer__c – stores customer information
- Product__c – stores product details
- Order__c – stores order records

Tabs

With the help of tabs, Salesforce enables the user interface to show object data, thus making it very easy to work with and manage records. Consider the case of having a Product__c tab where the user can quickly gain access to and manage product information.

Custom App

A Salesforce app created just for you, which combines your objects, tabs, and features in a way that makes it very easy for you to get to them.

Profiles

User permissions are specified, and what users can see and do in Salesforce is controlled.

Roles

A user's position in the organization will determine the level of access to the data and hierarchy.

Permission Sets

Users are given more rights without having their profiles changed.

Validation Rules

Before the records get saved, data input must comply with certain criteria.

Email Template

Communication is, for example, the “Order Confirmation” template, which is the email format consistent for that purpose.

Email Alerts

These are notifications sent automatically via email whenever certain actions or conditions are met, like when a customer changes their loyalty level, so they are informed.

Flows

You can get rid of coding completely when working with processes; just guide the user through the task, such as when you want to trigger an email alert after a new order is created.


Apex

Salesforce's proprietary programming language that has been applied in the development of custom logic and the automation of actions, such as the updating of the Total_Amount__c in orders and the depletion of the stock for the related products.

DETAILED EXECUTION OF THE PROJECT PHASES

1. Developer Org Set up

- I made use of the official signup page to create my Salesforce Developer Org.
- After the registration process was over, I confirmed my email and then set my password.
- After the account was authenticated, I could go in and see the Salesforce Setup page.



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Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud infrastructure.

☒ I agree to the Main Services Agreement – Developer Services and Salesforce Program Agreement. I acknowledge, as described in the Developer Documentation: (1) the Developer Edition includes autonomous and other generative AI features; and (2) Salesforce may limit use of those features and the org.

2. Custom Object Creation

To organize the project data and make it easy to retrieve, five custom objects were created:

HandsMen Customer – keeps records of users

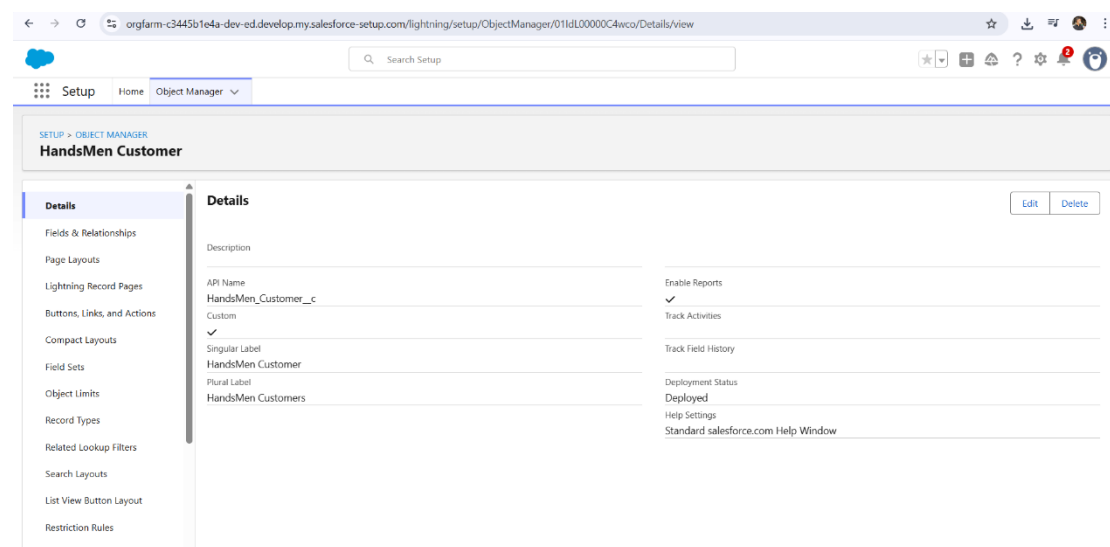
HandsMen Product – keeps records of items

Inventory – keeps track of stock

Marketing Campaign – keeps records of campaigns

Steps Followed:

- Went to Setup and opened Object Manager.
- Provided the required information for each custom object.
- The objects were saved, and tabs were created for each one so that they could be easily accessed in the application.



The screenshot shows the Salesforce Setup interface for the 'HandsMen Customer' custom object. The left sidebar contains a navigation menu with options like 'Details', 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', 'Record Types', 'Related Lookup Filters', 'Search Layouts', 'List View Button Layout', 'Restriction Rules', and 'Scoping Rules'. The main content area is titled 'Details' and includes a description, API Name (HandsMen_Customer__c), Custom checkbox, Singular Label (HandsMen Customer), Plural Label (HandsMen Customers), and a list of settings: Enable Reports (checked), Track Activities (checked), Track Field History, Deployment Status (Deployed), Help Settings, and a link to the Standard Salesforce.com Help Window. 'Edit' and 'Delete' buttons are visible in the top right corner of the details section.

3. Creating the Lightning App

- A Lightning App was made specifically to bring together all the different project-related objects and tabs.
- The app was equipped with the necessary navigation items so that users could frequently access Customers, Products, Orders, Inventory, and Campaigns with ease.

4. Validation Rules

The following validation rules were imposed to ensure correct data entry and to apply the necessary business rules:

- **Order Object:** Saving is prevented when $\text{Total_Amount_c} \leq 0$. Error Message: “A valid amount must be entered.”
- **Customer Object:** A valid email must be a Gmail one (i.e. the email field must contain “@gmail.com”). Error Message: “A valid Gmail address must be entered.”

The screenshot shows a Salesforce Lightning App form for a customer record. The form is titled "HandsMen Customer Name" and is owned by Tristan Frias. It includes the following fields: "Email" (with the value "luis@xyz.com"), "Phone", "Loyalty Status" (with a dropdown menu showing "--None--"), "FirstName" (with the value "m"), "LastName" (with the value "luis"), and "Total Purchases". An error message is displayed at the bottom of the form: "We hit a snag. Review the errors on this page. Please fill Correct Gmail". The form has buttons for "Cancel", "Save & New", and "Save".

5. User Role & Profile Setup

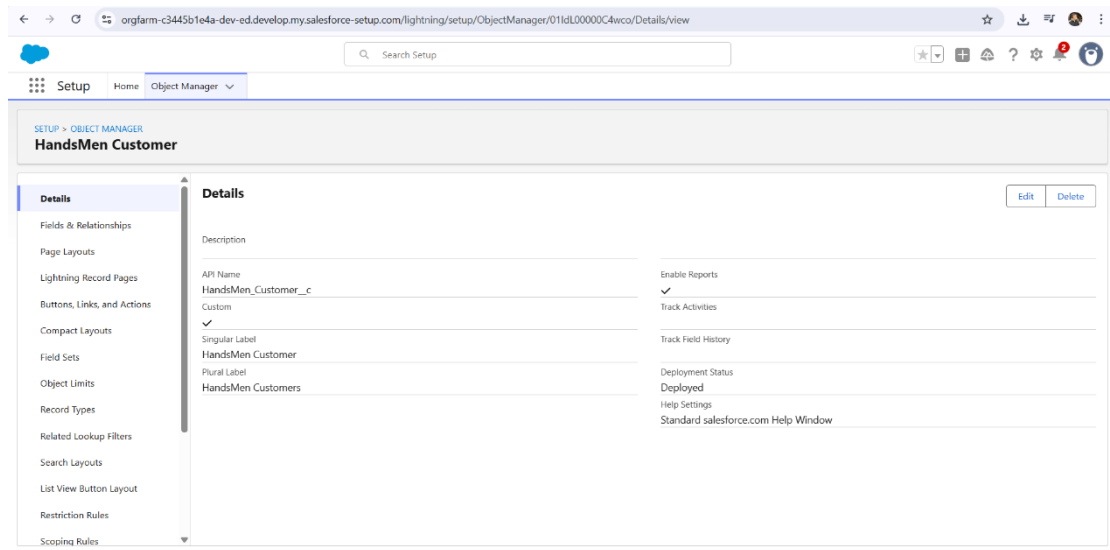
- Copy the Standard User profile to a new profile called Platform 1 and provide access to the custom object that is necessary.
- Created roles for different departments:
Sales Manager, Inventory Manager, Team

6. User Creation

A total of three users were created in Salesforce, and each of them received a role and profile in accordance with their duties:

- Niklaus Mikaelson - the Sales role was assigned to him

- Kol Mikaelson - the Inventory role was assigned to him
- The assignment of these roles, supported by the system, enhances the proper flow of data and process control.

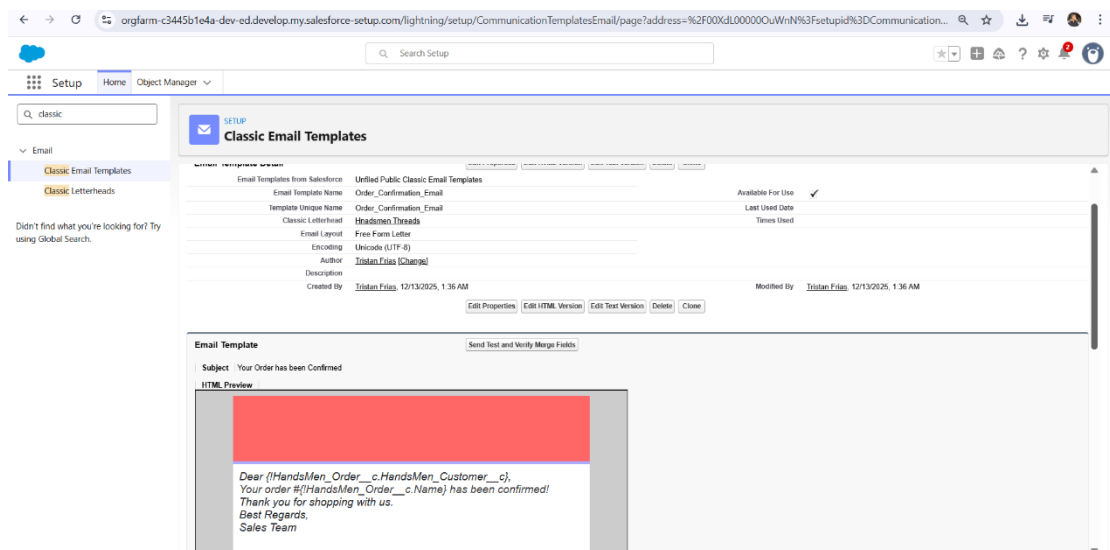


7. Email Template & Alerts

Three email templates were designed, including:

- Order Confirmation - Status is changed to Confirm. The email is sent
- Low Stock Alert - Email is sent when the number of Inventory is less than 5 units
- Loyalty Program Email - Email is sent when a change in loyalty status occurs

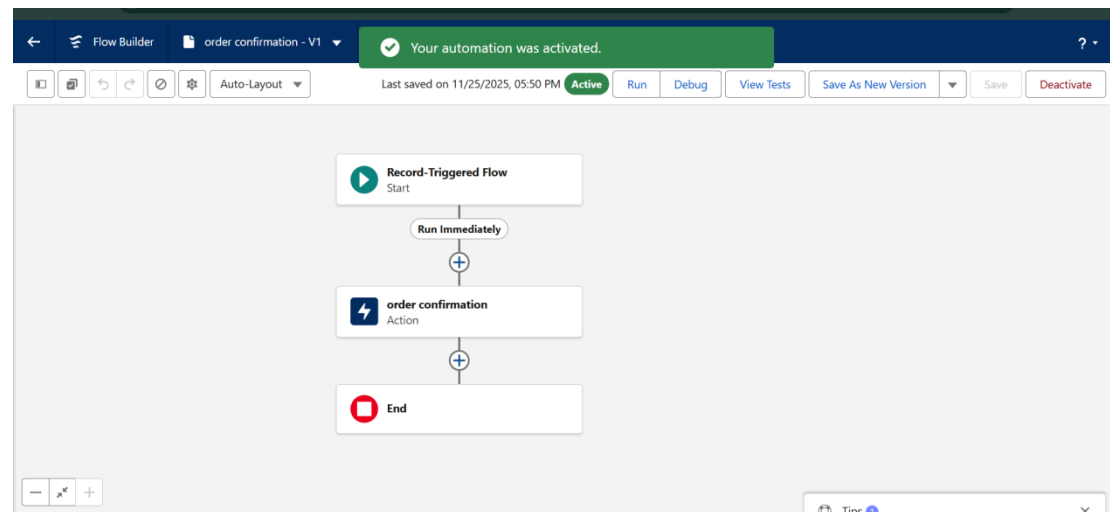
The automation was set up using the email alerts corresponding to these templates.



8. Flow Implementation

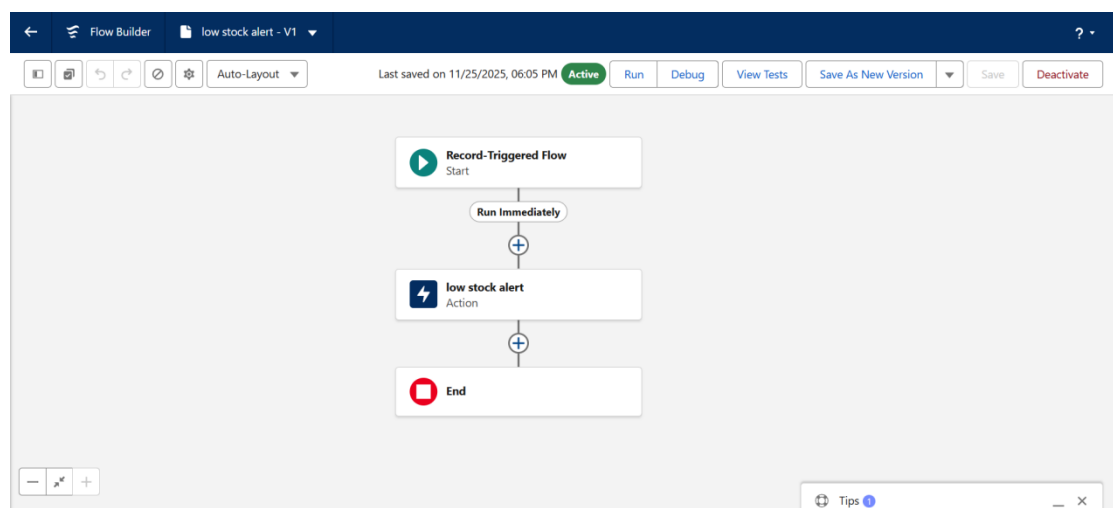
a. Order Confirmation Flow

- Confirmed is the new status for the order when it is updated
- An email confirming the order is sent to the customer concerned.



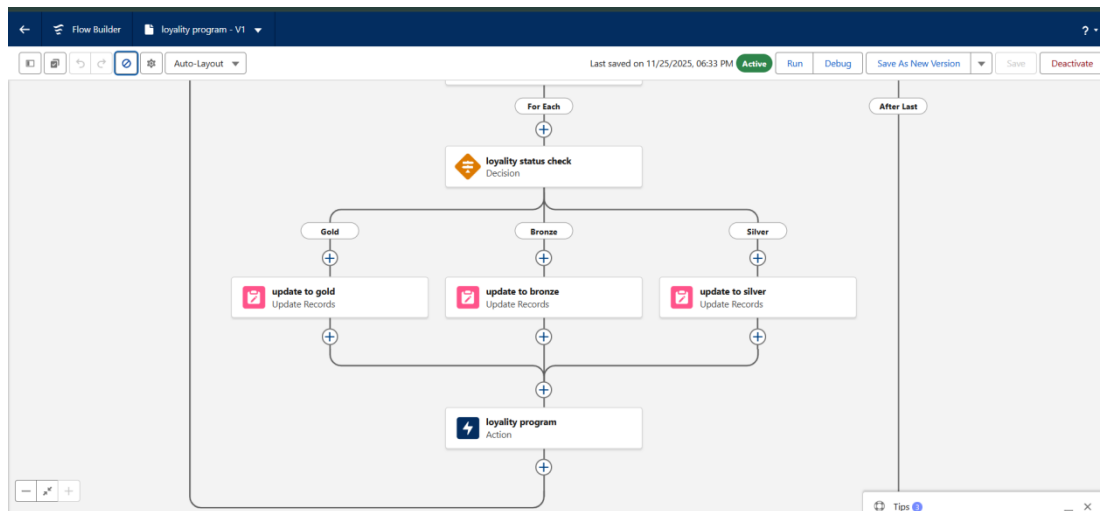
b. Stock Alert Flow

- Inventory stock is still monitored, and alerts are sent if it goes down to 5
- Send the Low Stock email to the Inventory Manager.



c. Scheduled Flow: Loyalty Update

- The flow is activated every day at midnight.
- The flow checks each customer and assigns a Loyalty Status based on the customer's total purchases.



7. Apex Triggers

- **Order Total Trigger:** Automatically determines the total amount according to the quantity and unit price.
- **Stock Deduction Trigger:** Stock is limited when an order is made.
- **Loyalty Status Trigger:** The total purchases determine Loyalty Status.

PROJECT EXPLANATION WITH REAL-WORLD EXAMPLE

Let's go through the process step by step as if it were a real customer interaction.

1. Customer Registration

- Marcus Reynoso is the name of the customer who comes to the online shop.
- In Salesforce: A new customer record has been created with Marcus' details in Customer__c.
- Validation Rule:
The email field verification must be done widely; thus, it should contain Marcus@gmail.com.

2. Product Setup

Admin is setting the products up in the Product__c:

- Canvas Jacket
- Slim-Fit Cargo Pants
- Eco Water Bottle

Every product has the following attributes:

- Price
- Category
- Description
- Supplier

Each product is assigned an inventory record that keeps track of the stock available for that product.

1. Order Placement

Marcus purchases:

- 1 × Canvas Jacket (₱850)
- 2 × Eco Water Bottle (₱199 each)

The system automatically creates a new record in Order__c.

$\text{Total_Amount_c} = (1 \times 850) + (2 \times 199) = \text{₱1,248}$

2. Inventory Update

Stock reduction is done through an Apex Trigger:

- Jacket stock -1
- Water Bottle stock -2

Validation Rule:

System checks if stock level is below zero through a validation rule that stops saving thus preventing negative inventory.

3. Loyalty Program

A check on the customer's accumulated purchases is done for Marcus:

According to the amount of the value:

Below 500 → Bronze

₱500-₱1000 → Silver

₱1000 → Gold

He turns into a Gold Customer since his total is ₱1,248.

4. Email Notifications

- On the occasion of a new order placement or renewal of loyalty status.
- Flow + Email Alert is activated.
- Elijah gets an email:

“Thanks for your purchase! Your loyalty status is now Silver.”

5. Users and Roles

Salesforce users who work like store personnel are set up:

- **Niklaus Mikaelson** - *Sales Role* (Platform 1 Profile)
- **Kol Mikaelson** - *Inventory Role* (Platform 1 Profile)

SCREENHOTS

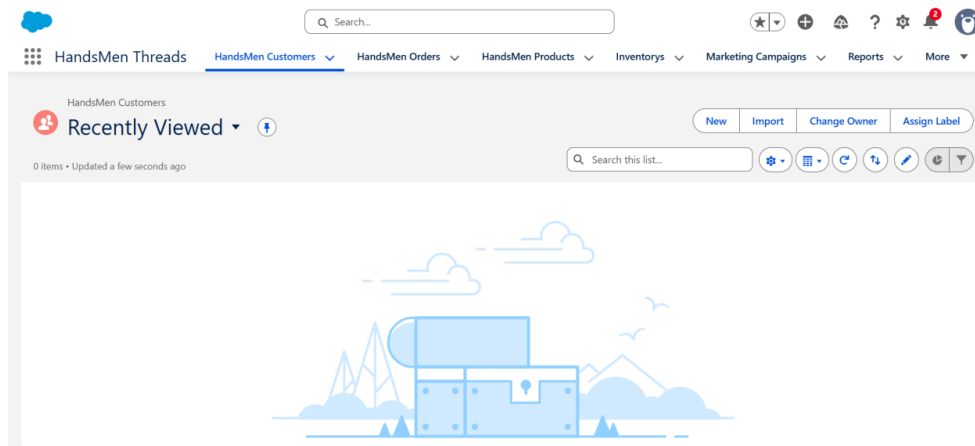


Fig: Custom App for HandsMen Threads

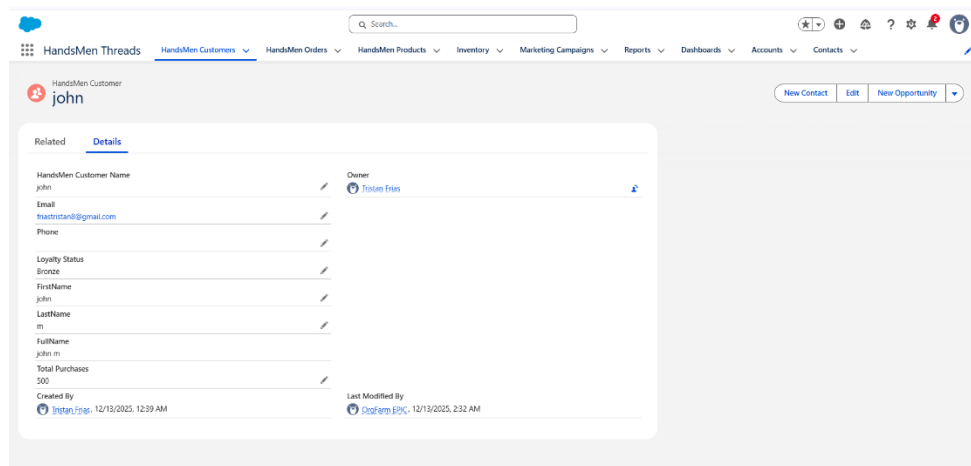


Fig: Customer Creation in HandsMen Threads

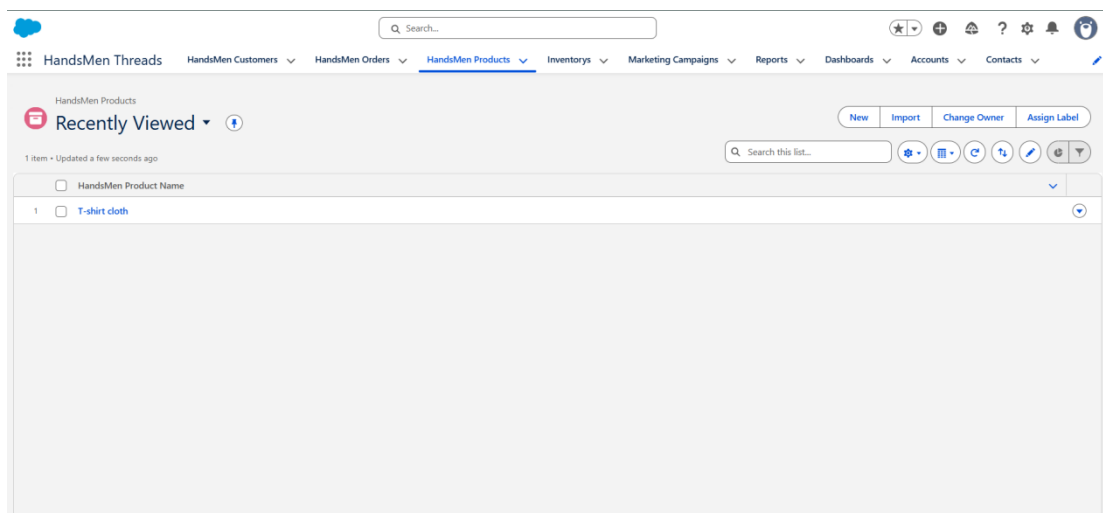


Fig: Product in HandsMen Threads

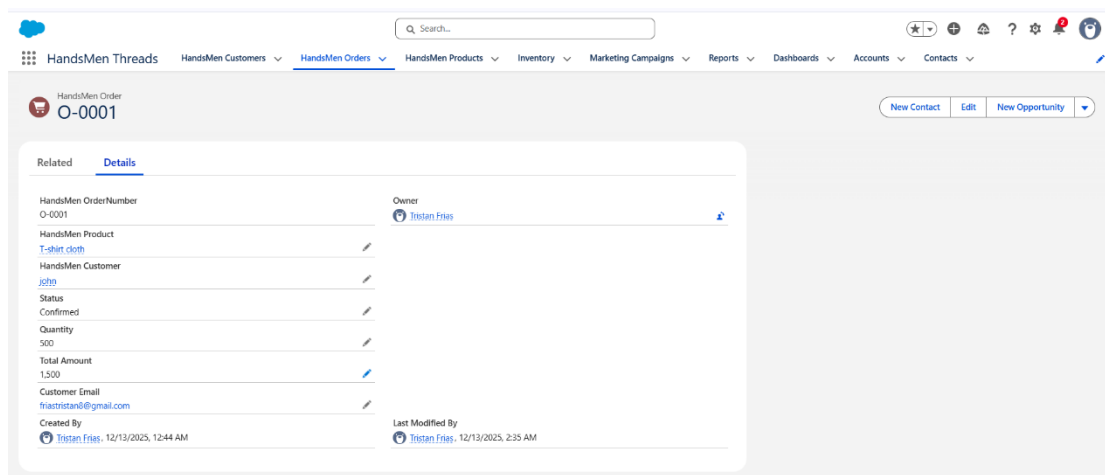


Fig: Order Confirmation

CONCLUSION

The Salesforce CRM project of HandsMen Threads is a perfect example of how Apex logic, automation tools, validation rules, and custom objects can work together to enhance the efficiency of business processes. The system handles products and inventories, organizes customer data, automates the entire order processing, and generates insights in real-time through dashboards and reports. All these activities contribute to a dramatic increase in accuracy and efficiency. Besides, the project highlights that Salesforce is the perfect platform for customer engagement, inventory, and sales control. On the whole, HandsMen Threads proves that an even small retail business can gain benefits from a properly implemented CRM system that not only increases efficiency but also eliminates manual work and supports better decision-making.

Future Scope:

1. Payment Gateway Connectivity

Give your customers the choice to pay digitally, and let Salesforce do the whole recording of the transaction automatically.

2. Mobile App Extension

Either redesign the website for mobile or adapt the Salesforce Mobile App to monitor stock and sales while you are out of the office.

3. Suggestions Driven by AI

Leverage the power of Einstein AI to spot the most valuable customers, predict stock-out, and suggest products.

4. Loyalty Program to be Increased

To make the loyalty program more interactive, add point-based rewards, coupons, and privileges for different customer tiers.

5. Support for Multiple Stores or Franchises

Allow the monitoring of separate inventories for each outlet, the reporting of all branches together, and the tracking of all branches as one.