

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

ABSTRACT

This project presents the implementation of a customized Salesforce CRM solution for **HandsMen Threads**, a premium men's fashion and tailoring brand. The objective was to streamline business operations, enhance customer engagement, and maintain data integrity across departments.

The solution involves designing a robust data model featuring five key custom objects: Customer, Order, Product, Inventory, and Marketing Campaign. Business processes were automated using Record-Triggered Flows, Scheduled Flows, Email Alerts, and Apex to handle order confirmations, loyalty status updates, and proactive stock alerts.

To ensure clean and reliable data, validation rules were established, and a role-based security model was implemented for the Sales, Inventory, and Marketing teams. The solution also includes a scheduled batch job using Apex to update low stock quantities.

This end-to-end CRM implementation improves customer experience through personalized communication, ensures operational efficiency with automation, and lays a scalable foundation for future business growth using the Salesforce Platform.

OBJECTIVE

The main objective of this project is to develop and implement a customized Salesforce CRM solution for HandsMen Threads to streamline core business operations, maintain data integrity, and enhance customer satisfaction.

By building a centralized system to manage customers, orders, products, inventory, and marketing campaigns, the project aims to:

- Automate key processes such as order confirmations, loyalty status updates, and stock alerts.
- Ensure accurate and consistent data entry using validation rules.
- Enable real-time visibility of inventory and customer interactions.
- Improve internal team coordination through role-based access control.
- Deliver personalized customer experiences through targeted communication and loyalty programs.

TECHNOLOGY DESCRIPTION

Salesforce:- Salesforce is a cloud-based Customer Relationship Management (CRM) platform that helps businesses manage customer data, automate processes, and improve service, marketing, and sales operations. It provides point-and-click tools as well as programmatic capabilities (like Apex and Flows) to build custom business solutions.

Custom Objects:- Objects in Salesforce are like tables in a database. Custom Objects are created to store specific data. Example:

- Customer__c – Stores customer info
- Product__c – Stores product details
- Order__c – Stores orders

Tabs:- Tabs are used to display object data in the Salesforce UI. Example: A tab for Product__c allows users to easily view and manage products.

Custom App:- An App in Salesforce is a collection of tabs grouped together for a specific business purpose.

Profiles:- Profiles define what a user can see, do, and edit in Salesforce. It controls object permissions, field access, and more.

Roles:- Roles control the data visibility in Salesforce's role hierarchy. It's used for sharing settings and reporting.

Permission Sets:- Permission Sets grant additional permissions to users without changing their profile.

Validation Rules:- Validation Rules ensure data entered meets business criteria. Example:

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

Email Templates:- Predefined formats for sending emails to customers or users. Example:

- "Order Confirmation" template

Email Alerts:- Email Alerts are actions in Flows or Workflow Rules that send emails using predefined templates. Example: When a loyalty level changes, an email is sent to the customer.

Flows:- Flows automate business logic without code. They can create, update, or send notifications. Example:

- Flow triggers email alerts on new order

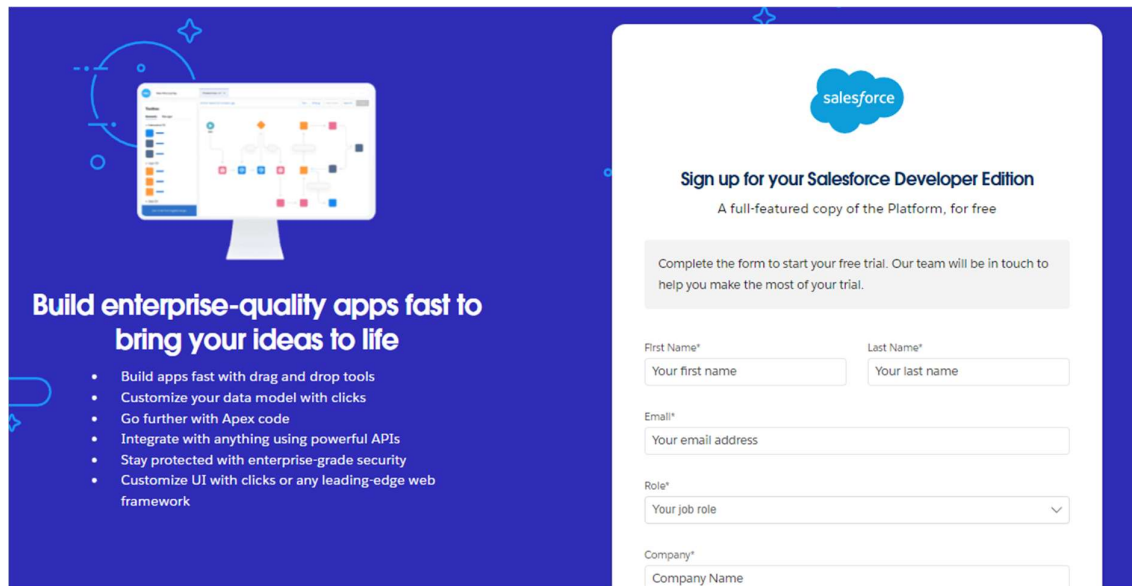
Apex:- Apex is Salesforce's object-oriented programming language. It allows developers to write custom logic. Example Triggers:

- Update Total_Amount__c in orders
- Reduce inventory stock

DETAILED 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.

Steps followed:

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

SETUP > OBJECT MANAGER

HandsMen Customer

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
Scoping Rules

Details

Edit Delete

Description

API Name
HandsMen_Customer__c

Custom
✓

Singular Label
HandsMen Customer

Plural Label
HandsMen Customers

Enable Reports
✓

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

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"

New HandsMen Customer

* = Required Information

Information

* HandsMen Customer Name
rahuk

Email
utkarshkushwaha09@xyz.com

Phone

Loyalty Status
--None--

FirstName
rahul

LastName
d

Total Purchases

Owner
utkarsh kushwaha

⊘ We hit a snag.

Review the errors on this page.

- Please fill Correct Gmail

Cancel Save & New Save

5. User Role & Profile Setup

- Cloned the Standard User profile to a new profile named Platform 1 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.

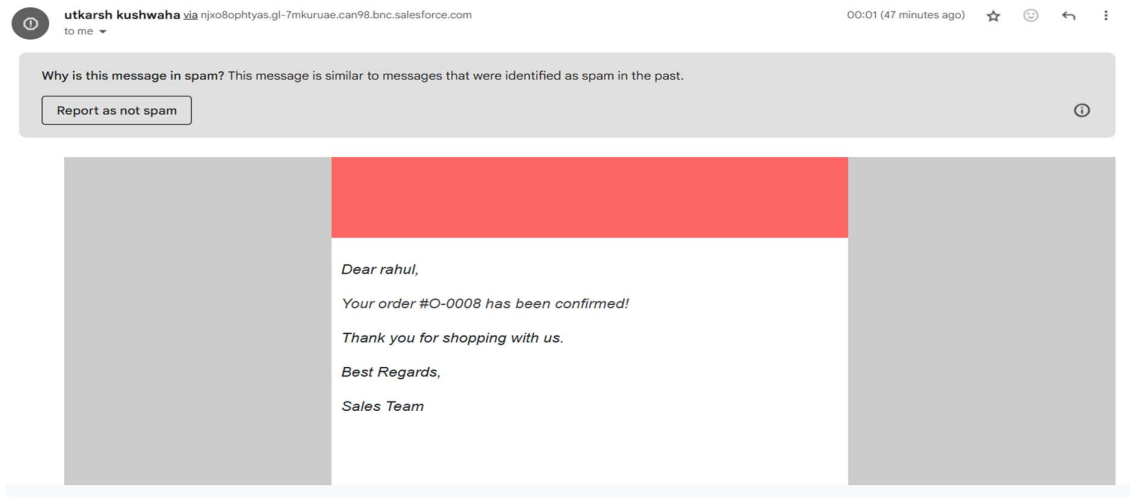
The screenshot shows the 'User Edit' interface for a user named Niklaus Mikaelson. The page is divided into two main sections: 'General Information' and 'Permissions'. The 'General Information' section includes fields for First Name (Niklaus), Last Name (Mikaelson), Alias (nmika), Email (utkarshkushwaha09@gmail), Username (utkarshkushwaha200904@), Nickname (User175381095884411595), Title, Company, Department, and Division. The 'Permissions' section includes a Role dropdown (Sales), User License dropdown (Salesforce), Profile dropdown (Platform 1), and a list of checkboxes for various user types: Active (checked), Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Data.com User Type (None), Data.com Monthly Addition Limit (300), and Accessibility Mode (Classic Only). The page also features 'Save', 'Save & New', and 'Cancel' buttons at the top.

7. Email Template & Alerts

Created 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

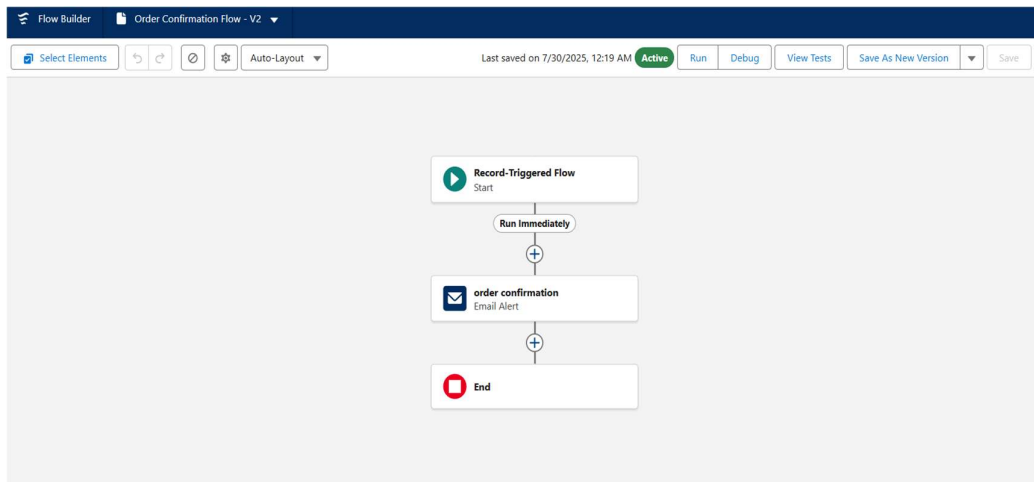
Corresponding Email Alerts were created using these templates and linked to automation flows.



8. Flow Implementations

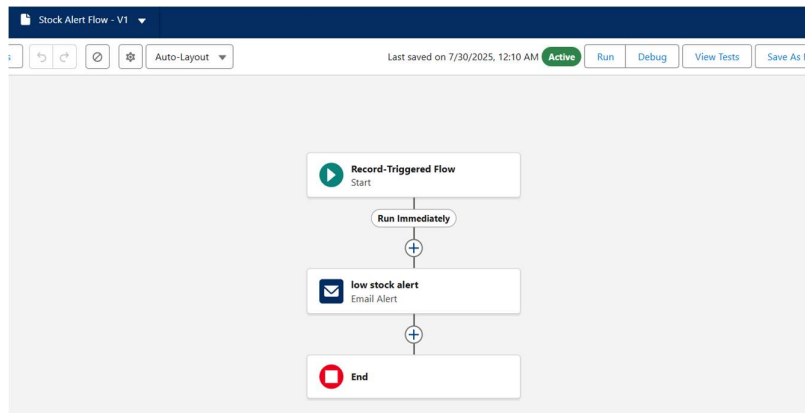
a. Order Confirmation Flow

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



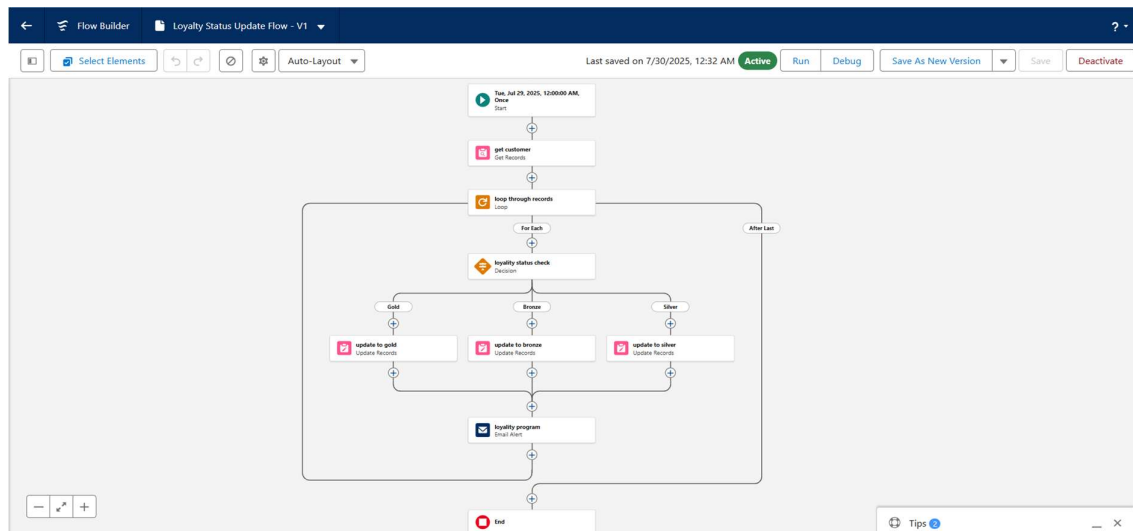
b. Stock Alert Flow

- 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 customers and updates their Loyalty Status based on total purchases.



7. 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.

PROJECT EXPLANATION WITH REAL-WORLD EXAMPLE

1. Customer Registration

- A customer, Elijah Mikaelson, visits the store or website.
- In Salesforce: A record is created in the Customer object with his name, phone, email, etc.
- Validation Rule: Ensures the email is valid (e.g., must contain @gmail.com).

2. Product Setup

- The admin adds products like Shirts, Jeans, etc., into the Product__c object.
- Each product has a price and other details.
- Inventory is also created to manage stock for these products.

3. Order Placement

- Elijah decides to buy 2 shirts (each ₹500). An order is placed.
- In Salesforce: A new Order record is created.
- Apex Trigger: Automatically calculates $\text{Total_Amount_c} = 2 \times 500 = ₹1000$.

4. Inventory Update

As soon as the order is placed:

- Apex Trigger on Inventory: Reduces shirt stock by 2.
- Validation Rule: Ensures stock never goes below 0.

5. Loyalty Program

- Elijah now has a total purchase of ₹1000.
- A trigger on Customer checks his total purchases.
- Based on the value:
 - $< ₹500 \rightarrow$ Bronze
 - $₹500\text{--}₹1000 \rightarrow$ Silver
 - $₹1000 \rightarrow$ Gold
- So, Elijah becomes a Silver member.

6. Email Notifications

- When a new order is placed or loyalty status is updated:
- Flow + Email Alert is triggered.
- Elijah gets an email: "Thanks for your purchase! Your loyalty status is now Silver."

7. Users and Roles

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

SCREENSHORTS

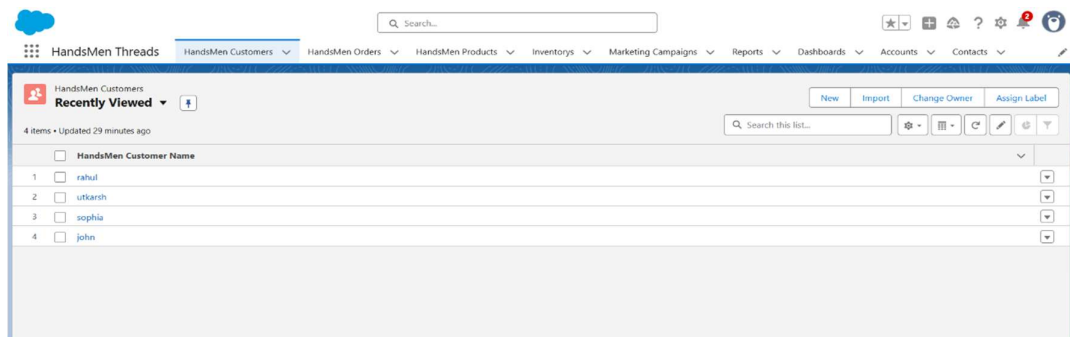


Figure 1 Custom App for HandsMan Thread

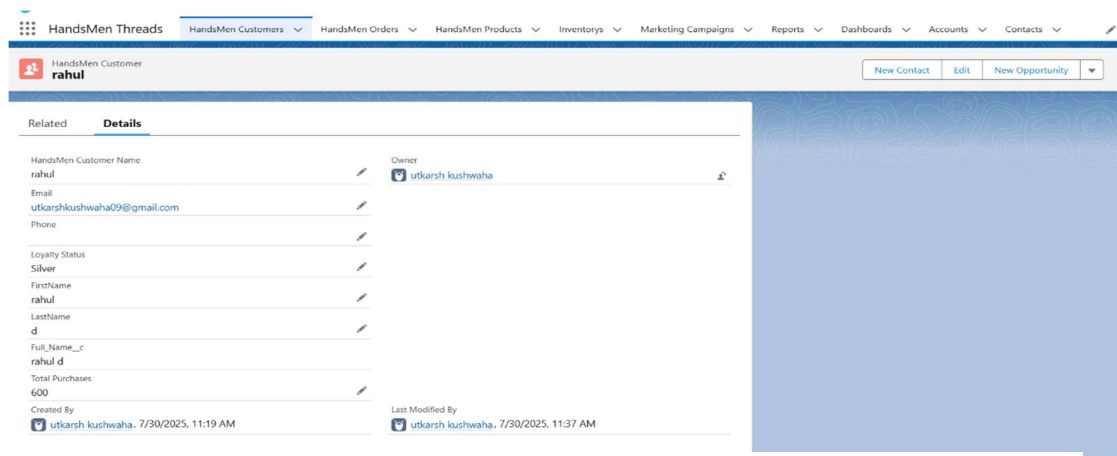


Figure 2 Customer for HandsMan Threads

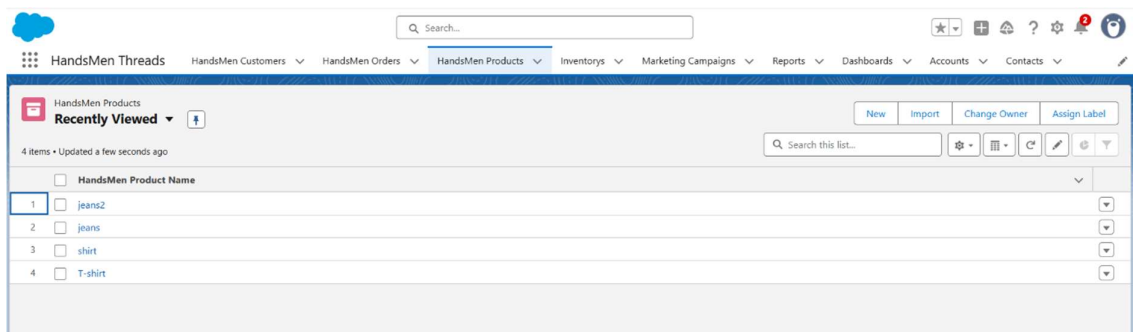


Figure 3 Product in HandsMen Threads

4. AI-Powered Recommendations (Einstein)

- Use Salesforce Einstein to provide personalized product suggestions based on past purchases.

5. WhatsApp/SMS Integration

- Notify customers via WhatsApp or SMS about order confirmations and loyalty updates.