

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

ABSTRACT

This document presents a real-world Salesforce CRM implementation for HandsMen Threads, inspired by industry-grade practices. It demonstrates how core business operations - like order management, inventory tracking, and customer engagement can be streamlined using Salesforce features like custom objects, validation rules, flows, Apex triggers, and email alerts.

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 objective is to simplify customer and order workflows, ensure real-time visibility of stock, personalize customer interaction, and support future scalability by leveraging automation on the Salesforce Platform. The main objective of this project is to develop and implement a customized Salesforce CRM solution for Hands Men 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 - Customer 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.

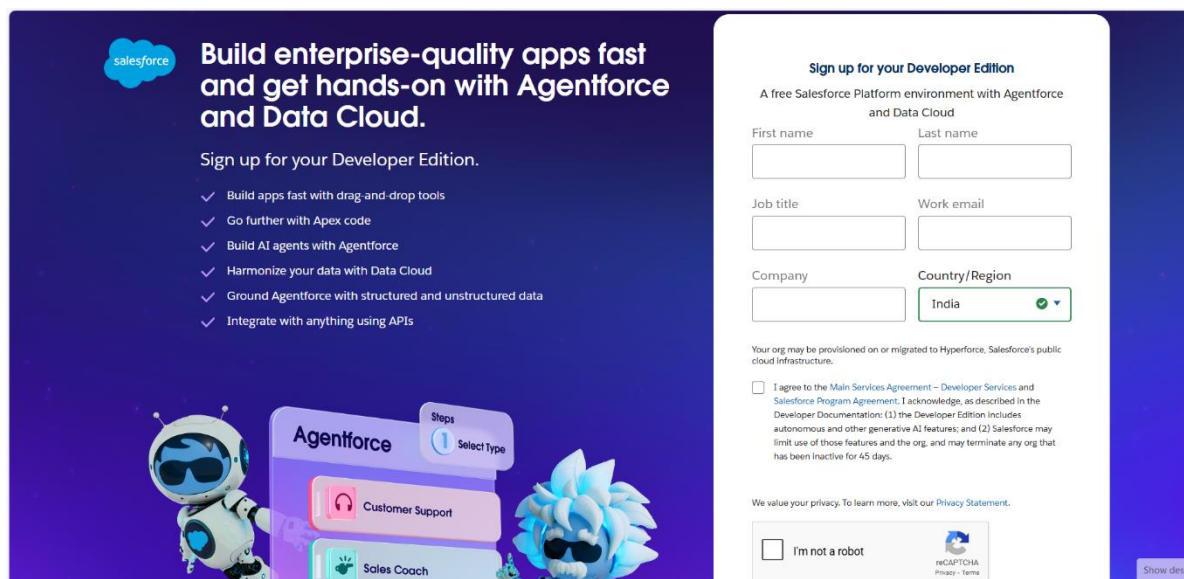
Example Triggers:

- 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



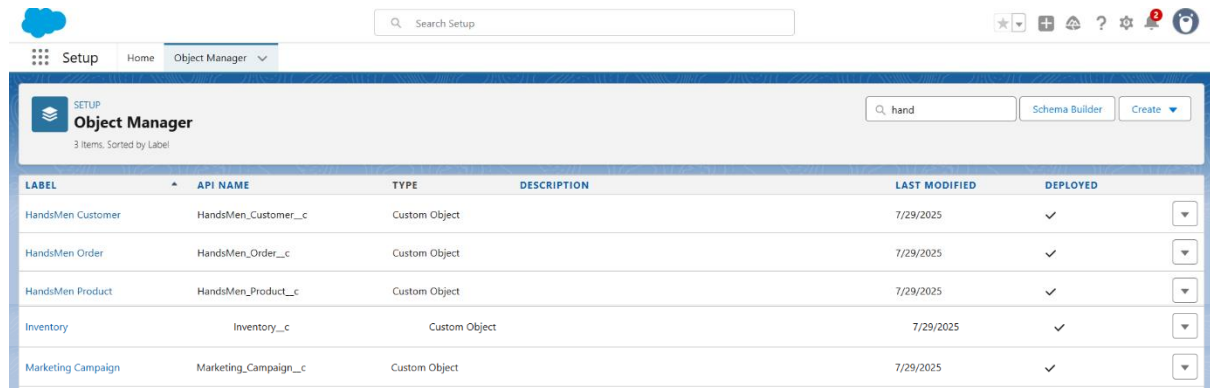
2. Custom Object Creation

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

- **HandsMen Customer:** Stores customer info like email, phone, loyalty status.
- **HandsMen Product :**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



The screenshot shows the Salesforce Setup Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar at the top right contains the text 'hand'. Below the navigation bar, the 'Object Manager' section is active, displaying a list of custom objects. The table has columns for LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The objects listed are HandsMen Customer, HandsMen Order, HandsMen Product, Inventory, and Marketing Campaign, all of which are Custom Objects and have been deployed.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
HandsMen Customer	HandsMen_Customer__c	Custom Object		7/29/2025	✓
HandsMen Order	HandsMen_Order__c	Custom Object		7/29/2025	✓
HandsMen Product	HandsMen_Product__c	Custom Object		7/29/2025	✓
Inventory	Inventory__c	Custom Object		7/29/2025	✓
Marketing Campaign	Marketing_Campaign__c	Custom Object		7/29/2025	✓

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
john

Email
xyz@example.com

Phone

Loyalty Status
--None--

FirstName

LastName

Total Purchases

Owner
Vaghdevi Pappala

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

Setup Home Object Manager

users

Users

Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings

Users

Feature Settings
Data.com
Prospector Users

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

SETUP Users

All Users

On this page you can create, view, and manage users.
To get more licenses, use the Your Account app. Let's Go

View: All Users Edit Create New User

New User Reset Password(s) Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty009gk000007rbwruai@vibmce5d2@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	EPIC_OrgFarm	OEPIC	ewic069c558c3fd1@orgfarm.salesforce.com		✓	System Administrator
<input type="checkbox"/> Edit	Mikaelson_Daniel	dmika	322103282073.vaghdevi234@yypcw.ac.in	Marketing	✓	Platform 1
<input type="checkbox"/> Edit	Mikaelson_Kol	kmika	322103282073.vaghdevi123@yypcw.ac.in	Inventory	✓	Platform 1
<input type="checkbox"/> Edit	Mikaelson_Niklaus	nmika	322103282073.vaghdevi012@yypcw.ac.in	Sales	✓	Platform 1
<input type="checkbox"/> Edit	Pasopala_Vaghdevi	322	322103282073.vaghdevi365@agentforce.com		✓	System Administrator
<input type="checkbox"/> Edit	User_Integration	intgrg	integration@00d9h0000007rbwruai.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00d9h0000007rbwruai.com		✓	Analytics Cloud Security User

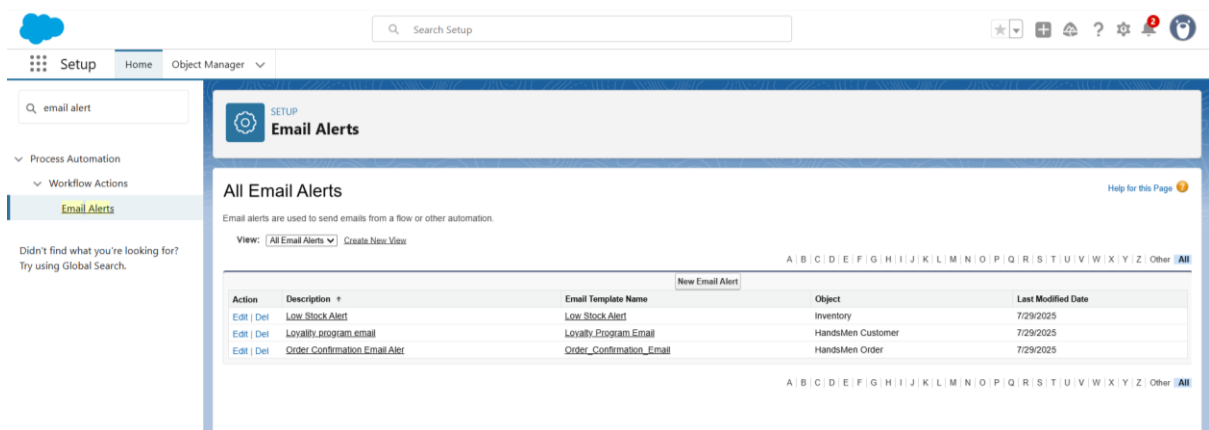
New User Reset Password(s) Add Multiple Users

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

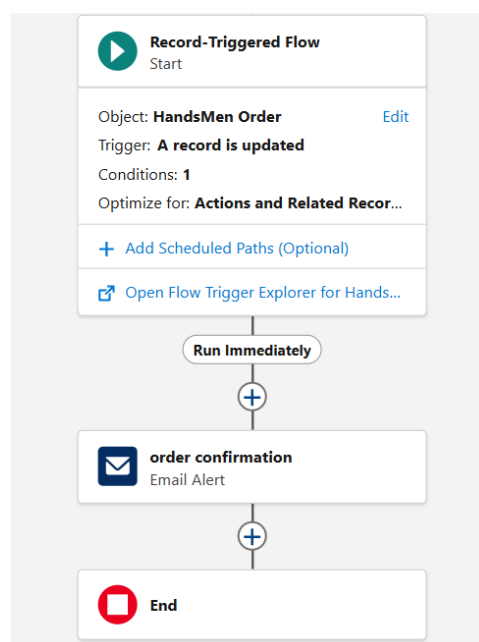
Corresponding Email Alerts were created using these templates and linked to automation flows.



8. Flow Implementations

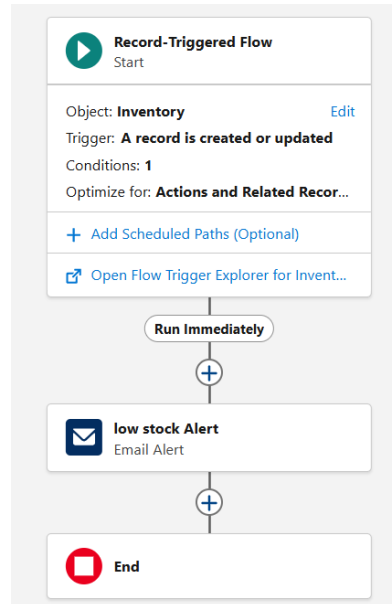
a. Order Confirmation Flow

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



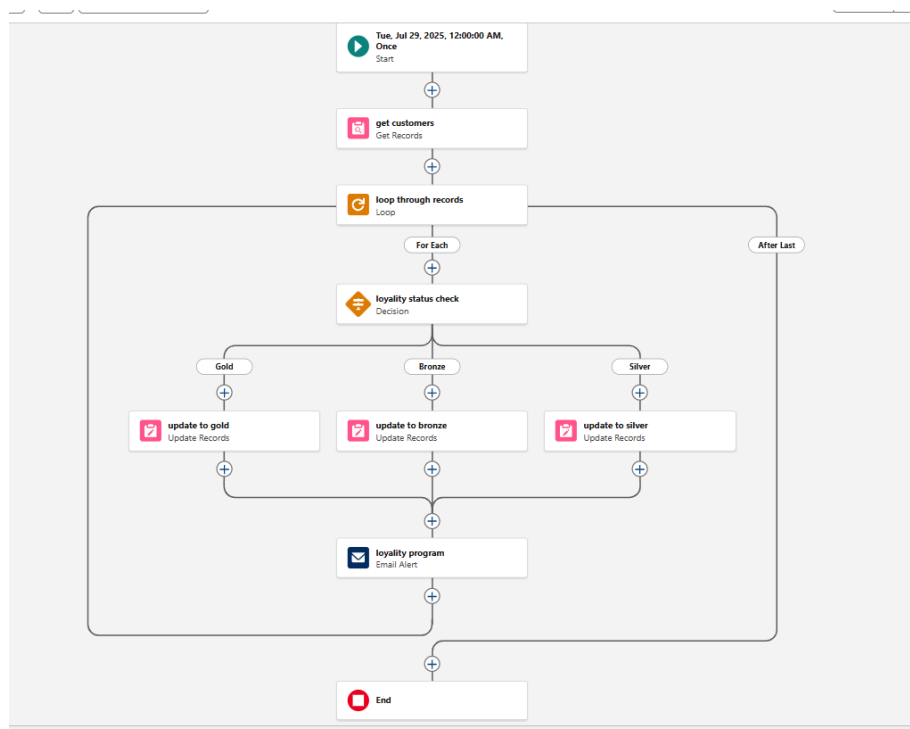
b. Stock Alert Flow

- 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

This section simulates how a real customer experience is executed in Salesforce—from registration to purchase and beyond—mirroring the HandsMen Threads demo video.

Let's walk through it like a real customer interaction.

1. Customer Registration

- A customer, John, 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 Premium Shirts, Jeans, etc., into the Product object.
- Each product has a price and other details.
- Inventory is also created to manage stock for these products.

3. Order Placement

- John decides to buy 20 shirts (each \$3). An order is placed.
- In Salesforce: A new Order record is created.
- Apex Trigger: Automatically calculates $\text{Total_Amount} = 20 \times 3 = \60

4. Inventory Update

As soon as the order is placed:

- Apex Trigger on Inventory: Reduces shirt stock from 180 to 160.
- Validation Rule: Ensures stock never goes below 0.

5. Loyalty Program

- John now has a total purchase of ₹500.
- A trigger on Customer checks his total purchases.

Based on the value:

- A. If less than Rs.500 → Bronze
- B. In between Rs.500-Rs.1000 → Silver

C. If greater than ₹1000 → Gold

- So, John becomes a Silver member.

6. Email Notifications

- When a new order is placed or loyalty status is updated:
- Flow Email Alert is triggered.
- John gets an email:

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

7. Users and Roles

Salesforce users like store staff are created:

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

SCREEN SHOTS

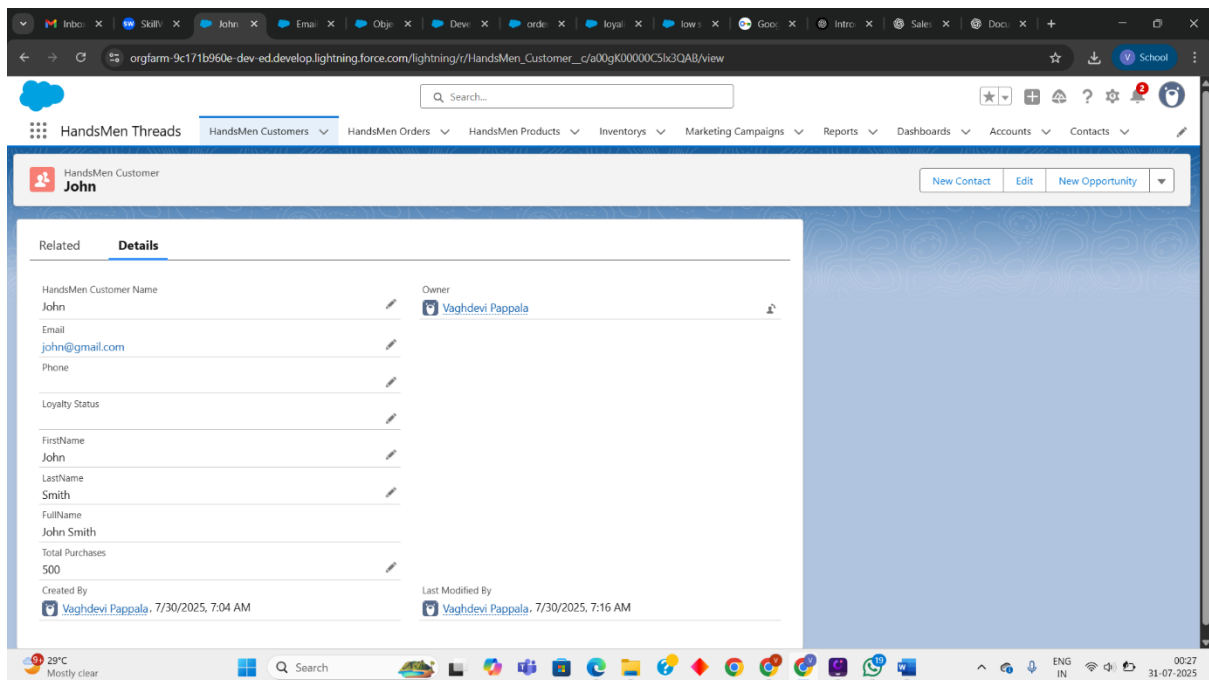


Fig: Creation of HandsMen Customer

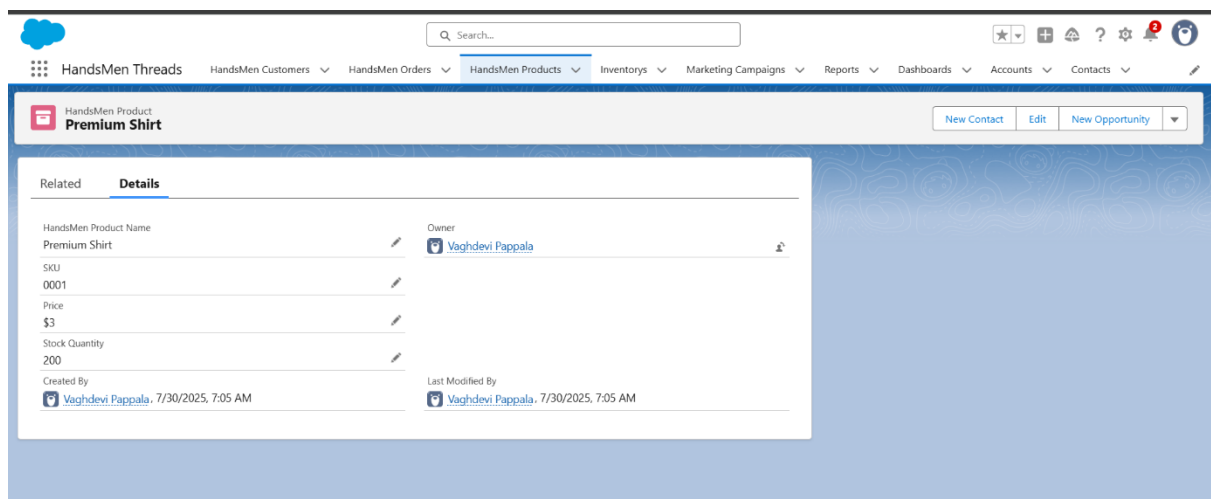


Fig: Creation of HandsMen Product

The screenshot displays the 'HandsMen Orders' section of the application. The top navigation bar includes a search bar and various icons. The main header shows 'HandsMen Order O-0004' with buttons for 'New Contact', 'Edit', and 'New Opportunity'. The 'Details' tab is active, showing the following information:

HandsMen OrderNumber	O-0004	Owner	Vaghdevi Pappala
HandsMen Product	Premium Shirt		
HandsMen Customer	John		
Status	Confirmed		
Quantity	20		
Total Amount	60		
Customer Email	vaghdevipappala@gmail.com		
Created By	Vaghdevi Pappala, 7/30/2025, 7:06 AM	Last Modified By	Vaghdevi Pappala, 7/30/2025, 7:08 AM

Fig: Placing of HandsMen Orders

The screenshot displays the 'Inventories' section of the application. The top navigation bar includes a search bar and various icons. The main header shows 'Inventory I-0002' with buttons for 'New Contact', 'Edit', and 'New Opportunity'. The 'Details' tab is active, showing the following information:

Inventory Number	I-0002
HandsMen Product	Premium Shirt
Stock Quantity	4
Stock Status	Low Stock
Warehouse	xyz
Created By	Vaghdevi Pappala, 7/30/2025, 7:05 AM
Last Modified By	Vaghdevi Pappala, 7/30/2025, 7:14 AM

Fig: Inventory custom object

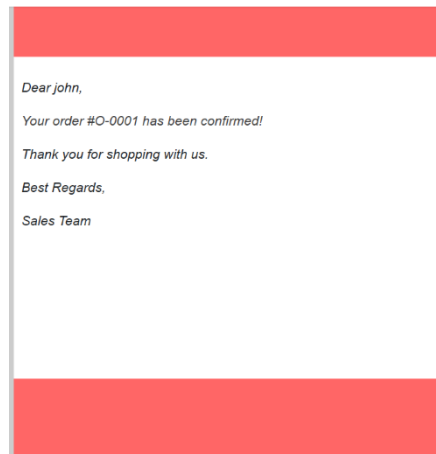


Fig: Order Confirmation Email

Congratulations! You are now a Bronze 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: Alert mail for loyalty program

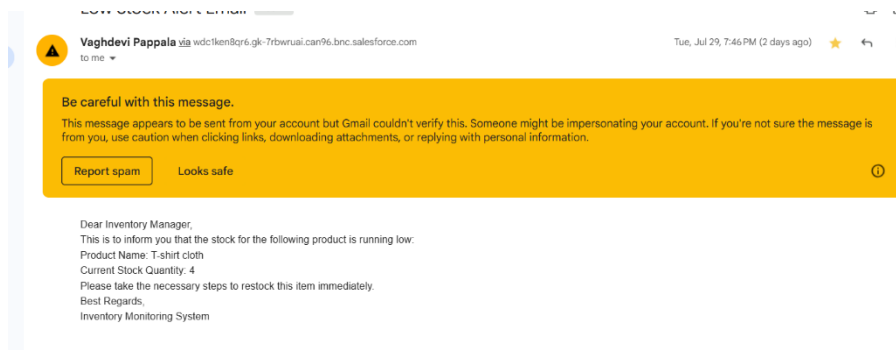


Fig: Alert mail for low stock alert

CONCLUSION

The HandsMen Threads CRM system built on Salesforce successfully streamlines key business processes like customer management, product cataloging, order processing, inventory tracking, and loyalty program automation. By leveraging Salesforce tools like Custom Objects, Flows, Validation Rules, Email Alerts, and Apex, the system ensures accurate data entry, real-time updates, and enhanced customer experience. Through automation and well-structured user roles, the platform minimizes manual errors, speeds up operations, and provides better insights into sales and stock.

Future Scope:-

1. Customer Portal Integration

- Build a Customer Community Portal where customers can log in, view orders, and track loyalty status.

2. Mobile App using Salesforce Mobile SDK

- Enable store staff to manage inventory and orders on the go using a mobile interface.

3. Reports & Dashboards

- Create detailed sales and inventory dashboards for management to monitor trends and performance in real-time.

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.