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

ABSTRACT

The HandsMen Threads project is a Salesforce-based CRM and automation solution tailored for a premium men's fashion brand. The project leverages Salesforce's ecosystem—including Sales Cloud, Service Cloud, and Marketing Cloud—to centralize operations, enhance customer engagement, and streamline the entire buyer journey.

At its core, the solution delivers a 360-degree customer view by integrating eCommerce, point-of-sale systems, loyalty data, and styling preferences. It enables the brand to personalize communications, automate sales processes, manage customer service cases, and track campaign performance—all in real time. With custom objects such as Wardrobe History, Tailor Appointments, and Loyalty Tier, the system supports high-end customer experiences through data-driven interactions and intelligent automation.

The project aims to drive business growth through improved lead conversion, increased repeat purchases, and elevated brand loyalty. Future expansions include AI styling assistants and virtual try-on features, positioning HandsMen Threads as a cutting-edge player in the luxury fashion industry.

OBJECTIVE

To support the growth and customer-centric mission of HandsMen Threads, the Salesforce implementation is designed with key business and technical goals. These objectives aim to enhance customer experience, streamline internal operations, and ensure the platform scales with future innovations.

- Centralized CRM to manage leads, contacts, and opportunities efficiently.

- Deliver personalized marketing campaigns based on customer preferences and behavior.

- Integrate eCommerce, POS, and loyalty systems for a complete customer view.

TECHONOLOGY DESCRIPTION

Salesforce:-

Salesforce is a cloud-based CRM platform that enables businesses to manage customer relationships, automate workflows, and gain real-time insights. It offers scalable tools like Sales Cloud, Service Cloud, and Marketing Cloud to streamline operations and personalize customer engagement.

Custom Objects:-

Objects in Salesforce are like tables in a Database. Custom Objects are created to store specific data.

Tabs:-

Tabs in Salesforce represent different data entities like Leads, Accounts, Orders, and Custom Objects. In this project, tabs such as *Style Preferences*, *Tailor Appointments*, and *Wardrobe History* provide quick access to key fashion-related records and workflows.

Profiles:-

Profiles in Salesforce define the access level and permissions for different users. In this project, custom profiles were created for roles such as *Sales Executives*, *Fashion Consultants*, and *Customer Support Agents* to control data visibility, object access, and workflow actions based on their responsibilities.

Roles:-

Roles in Salesforce determine the hierarchy and data access across the organization. In the HandsMen Threads project, roles like *Sales Manager*, *Fashion Consultant*, and *Support Lead* were defined to control record-level visibility and reporting access based on the user's position in the team structure.

Permission Sets:-

Permission Sets in Salesforce allow users to gain additional access without changing their profile. In the HandsMen Threads project, permission sets were used to grant specific users access to features like *Marketing Cloud*, *Custom Objects* (e.g., Wardrobe History), and *Reports*, enabling flexibility without modifying base profiles.

Validation Rules:-

Validation Rules in Salesforce ensure data accuracy by preventing users from saving records that don't meet specific criteria. In the HandsMen Threads project, validation rules were applied to enforce required fields like *Appointment Date*, restrict discount values beyond allowed limits, and ensure correct formatting for contact information.

Email Templates:-

Email Templates provide consistent, branded communication with customers. The project used templates for *Order Confirmations*, *Tailor Appointment Reminders*, *Loyalty Tier Updates*, and *Promotional Campaigns*, helping the brand maintain professional and personalized outreach at scale.

Email Alerts:-

Email Alerts are automated notifications sent based on specific triggers or conditions. In the HandsMen Threads project, email alerts were used to notify customers about *order confirmations*, *appointment bookings*, and *loyalty tier changes*, ensuring timely and consistent communication.

Flows:-

Flows are point-and-click automation tools used to handle complex business logic without code. This project utilized flows for automating *lead assignments*, *loyalty status updates*, *follow-up tasks* after consultations, and *post-order communications*—streamlining operations across departments.
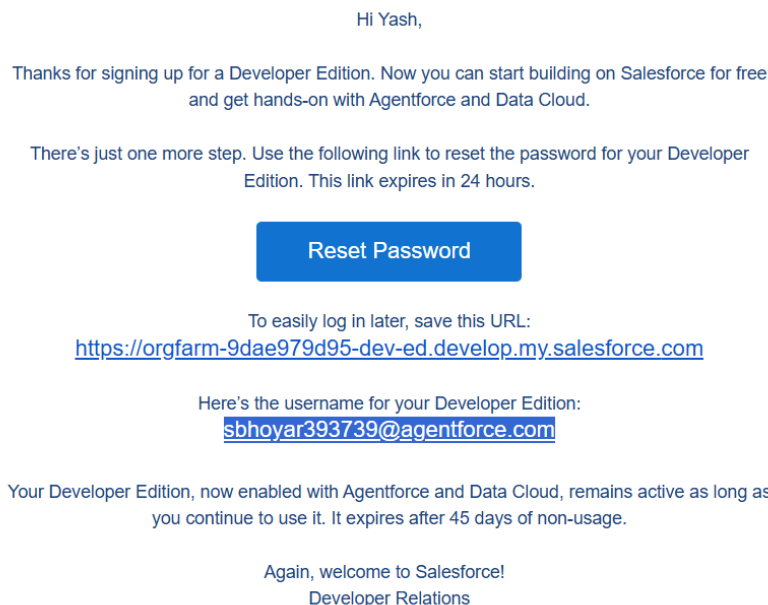
Apex:-

Apex is Salesforce's programming language used for advanced logic beyond what flows can handle. In this project, Apex was implemented to manage custom scenarios like *automated loyalty point calculations*, *bulk updates for wardrobe history*, and *integration with external systems* such as eCommerce platforms or payment gateways.

DETAILED EXECUTION OF PROJECT PHASES

Salesforce Cerdentials Setup

1.Creating a developer org in salesforce.

- Go to https://developer.salesforce.com/signup
- Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account

Hi Yash,

Thanks for signing up for a Developer Edition. Now you can start building on Salesforce for free and get hands-on with Agentforce and Data Cloud.

There's just one more step. Use the following link to reset the password for your Developer Edition. This link expires in 24 hours.

Reset Password

To easily log in later, save this URL:
https://orgfarm-9dae979d95-dev-ed.develop.my.salesforce.com

Here's the username for your Developer Edition:
sbhoyar393739@agentforce.com

Your Developer Edition, now enabled with Agentforce and Data Cloud, remains active as long as you continue to use it. It expires after 45 days of non-usage.

Again, welcome to Salesforce!
Developer Relations

2. Custom Object Creation

- HandsMen Customer – Stores personal details, measurements, and style preferences.
- HandsMen Order – Tracks customer purchases, status, and delivery.
- HandsMen Product – Maintains catalog details like size, fabric, and pricing.
- Inventory – Manages stock levels across products and locations.

- Marketing Campaign – Handles promotional campaigns and customer engagement tracking

3. Create a Lightning App

A custom Lightning App named "HandsMen Threads" was created to provide a unified workspace for managing the brand's operations. This app includes key objects, tabs, and tools needed by sales, marketing, and service teams.

4, Validation Rules

- Object: *HandsMen Order__c*
  - Field: *Total_Amount__c*
  - Rule: Total amount must be greater than 0 (Total_Amount__c <= 0)
- Object: *Inventory__c*
  - Field: *Stock_Quantity__c*
  - Rule: Stock quantity must be greater than 0 (Stock_Quantity__c <= 0)
- Object: *HandsMen Customer__c*
  - Field: *Email*
  - Rule: Email must contain "@gmail.com" (NOT CONTAINS(Email, "@gmail.com"))

5. Creating Profile

Profiles in Salesforce control user permissions, object access, and UI visibility. In the HandsMen Threads project, a new profile named Platform 1 was created by cloning the Standard User profile. This profile was customized to grant users access to specific tabs, objects (like HandsMen Order and Inventory), and assigned permissions required for their role. Profiles ensure users see and do only what they are authorized for within the application.

6.Creating Roles

Roles in Salesforce define the hierarchy and control data visibility at the record level across the organization. In the HandsMen Threads project, the following roles were created:

- Sales Manager – Can view and manage all sales-related records, including team pipelines and reports.
- Inventory – Monitors stock levels, updates product availability, and ensures inventory accuracy.
- Marketing – Designs and tracks campaigns, manages customer engagement, and analyzes campaign performance.

7. Data Security - Users

To manage system access securely, users were created in Salesforce with roles and profiles aligned to their responsibilities in the HandsMen Threads project.

Users Created

- User: Niklaus
  - Role: Inventory
  - Profile: Platform 1
  - Access: Manage inventory records, update stock quantities, and track product availability.

- User: Kol
  - Role: Marketing
  - Profile: Platform 1
  - Access: Create and manage marketing campaigns, view campaign performance.

- User: Daniel
  - Role: Fashion Consultant
  - Profile: Platform 1
  - Access: Handle customer styling needs, schedule tailoring appointments, place orders.

8. Permission Set: Permission_Platform_1

A custom Permission Set named Permission_Platform_1 was created to provide additional access beyond the standard profile capabilities. This set grants specific permissions needed for users assigned the Platform 1 profile without altering the base profile.

Key Features:

- Grants access to custom objects like HandsMen Order, Inventory, and Marketing Campaign.
- Allows create, read, edit, and delete (CRED) rights on selected objects.
- Ensures flexibility by assigning extra permissions without cloning multiple profiles

9. Email Templates

Email Templates in Salesforce are pre-designed messages used to send consistent and professional communication. In the HandsMen Threads project, templates were created for order confirmations, promotional campaigns, and customer follow-ups to ensure brand-aligned, quick communication with customers.

10. Flows

Flows automate business processes in Salesforce with minimal code. The HandsMen Threads project includes the following flows:

- Create Order Confirmation Email – Sends an automated email to the customer when an order is placed.

- Create Stock Alert Email (Record-Triggered) – Triggers an alert when product stock drops below a defined threshold.

- Create a Scheduled Flow – Sends regular promotional emails or loyalty updates at scheduled intervals.
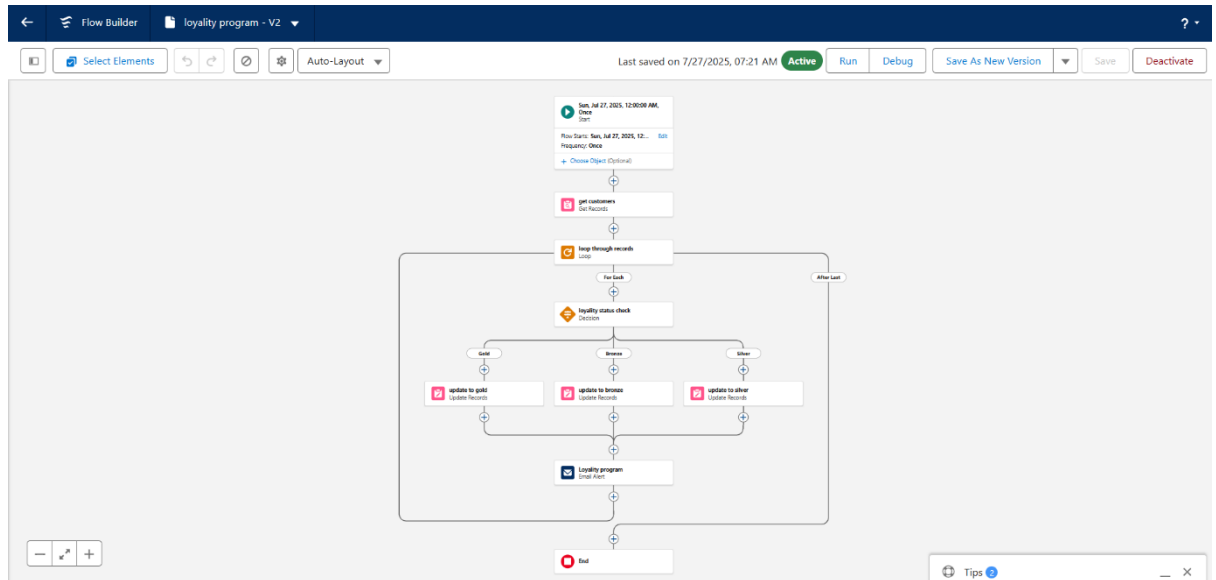
11.Batch Jobs

Batch Apex

Batch Apex is used in Salesforce to process large datasets efficiently by dividing them into manageable batches and executing them asynchronously.

In the HandsMen Threads project, a Batch Apex class was developed to support backend automation, including:

- Auto-updating Inventory levels based on bulk HandsMen Order processing.

- Generating monthly reports of customer purchase trends to support targeted marketing efforts.

- Cleaning outdated marketing campaign records to maintain data quality and system performance.

Conclusion

The HandsMen Threads Salesforce application successfully streamlines operations for a fashion-focused business. By implementing custom objects, validation rules, flows, profiles, and automation tools like Apex and Batch Apex, the project enhances customer management, order processing, inventory control, and marketing engagement. It provides a scalable, secure, and user-friendly environment tailored to business needs.

Future Scope

- Integrate third-party payment gateways for seamless order transactions.

- Add Einstein AI for predictive analytics on customer behavior and inventory demand.

- Develop a mobile app interface for fashion consultants and customers.

- Extend email and WhatsApp integration for personalized campaign delivery.

- Enable advanced dashboards with real-time analytics using Salesforce CRM Analytics (Tableau CRM).