HandsMen Threads: Transforming Business Management Through Salesforce CRM

SUMMARY

This project focuses on the development of a customized Salesforce CRM solution for HandsMen Threads, a premium men's fashion brand. The implementation aims to streamline operational workflows, enhance customer engagement, and maintain high data quality across multiple departments.

The solution is built on a solid data model consisting of five core custom objects: Customer, Order, Product, Inventory, and Marketing Campaign. Several essential business processes were automated using Record-Triggered Flows, Scheduled Flows, Email Alerts, and Apex. These automations cover processes such as order confirmations, loyalty status updates, and low-stock notifications.

To protect data accuracy and system security, validation rules were applied, along with a role-based security model for the Sales, Inventory, and Marketing teams. A scheduled Apex batch job was also implemented to systematically update low stock quantities.

Overall, this CRM solution improves customer experience through personalized communication, enhances internal efficiency through automation, and provides a scalable foundation for future business growth.

OBJECTIVE

The objective of this initiative is to design and implement a customized Salesforce CRM system that supports the daily operations of HandsMen Threads. The main goals include:
- Automating critical processes such as order confirmations, loyalty updates, and stock alerts.
- Ensuring accurate and consistent data entry with validation rules.
- Providing real-time visibility into inventory levels, customer activities, and orders.
- Enhancing team collaboration through role-based access control.
- Improving customer satisfaction with targeted communication and loyalty programs.

TECHNOLOGY DESCRIPTION

Salesforce
A cloud-based CRM platform used for managing customer data, automating workflows, and supporting sales, service, and marketing operations.

Custom Objects
Custom Objects store business-specific data. Examples include:
• Customer__c – customer information
• Product__c – product details
• Order__c – order information

Tabs
Tabs provide users with easy access to custom object data.

Custom App
A collection of related tabs built for a specific business function.

Profiles, Roles, and Permission Sets
• Profiles control what users can view or modify.
• Roles determine data visibility based on hierarchy.
• Permission Sets add extra privileges without altering profiles.

Validation Rules
Rules that ensure data meets business requirements.

Email Templates & Alerts
Ready-made email formats used for automated notifications.

Flows
Automation tools used to implement business logic without code.

Apex
Salesforce's programming language used to create custom back-end logic.

PROJECT EXECUTION
1. Developer Org Setup
A Salesforce Developer Org was created, verified, and prepared for configuration.

2. Custom Object Creation
Five custom objects were built to store the company's main data:
Customer, Product, Order, Inventory, Marketing Campaign.

3. Creating the Lightning App
A custom Lightning App named "HandsMen Threads" was created with tabs such as Customer, Order, Product, Inventory, Campaign, and Reports.

4. Validation Rules
Examples:
• Order: Total Amount cannot be ≤ 0.
• Customer: Email must contain "@gmail.com".

5. Role & Profile Setup
Roles were added for Sales Manager, Inventory Manager, and Marketing Staff.

6. User Creation
Example users:
• Niklaus Mikaelson – Sales
• Kol Mikaelson – Inventory

7. Email Templates & Alerts
Templates created for:
• Order Confirmation
• Low Stock Alert
• Loyalty Tier Update

8. Flows
Automated flows implemented for:
• Order confirmation
• Low stock notifications
• Daily loyalty updates

9. Apex Triggers
Includes:
• Automatic order amount calculation
• Inventory deduction
• Loyalty level updates

REAL-WORLD WORKFLOW EXAMPLE
1. Customer Registration
Elijah Mikaelson registers and the system validates his email.

2. Product & Inventory Setup
Products like shirts and jeans are added with corresponding stock.

3. Order Placement
Elijah orders two shirts; triggers calculate total cost.

4. Inventory Update
Stock decreases automatically.

5. Loyalty Program
Elijah reaches Silver tier based on purchases.

6. Email Notifications
Confirmation and loyalty emails sent automatically.

7. User Roles
Staff operate based on role permissions.

CONCLUSION
The Salesforce CRM system successfully enhances operations such as customer management, order handling, inventory tracking, and loyalty automation. With structured automation and disciplined access control, the platform reduces manual errors and improves workflow efficiency.

FUTURE ENHANCEMENTS
1. Customer portal for self-service.
2. Mobile staff app using Salesforce Mobile SDK.
3. Interactive dashboards.
4. AI-based product recommendations.
5. WhatsApp/SMS message integration.