

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

Project Overview

The HandsMen Threads Salesforce CRM is designed to elevate the art of sophistication in men's fashion by providing a digital platform that streamlines bespoke tailoring and customer management. The CRM enables seamless order processing, customer tracking, and inventory monitoring through automation and data-driven workflows.

Key features include custom objects, record-triggered flows, Apex triggers, email alerts, and scheduled automation to deliver an integrated and personalized experience for customers while optimizing business operations.

Objectives

The main objective of HandsMen Threads CRM is to develop a robust and scalable system that enhances the customer experience and operational efficiency of a men's tailoring business. Specifically, the project aims to:

- Streamline customer onboarding and record management.
- Automate order processing and inventory tracking.
- Implement email notifications for order confirmations and low stock alerts.
- Introduce a loyalty rewards program to retain customers and boost engagement.
- Provide real-time insights through reports and dashboards for better decision-making.

Phase 1: Requirement Analysis & Planning

Understanding Business Requirements

The business required a centralized CRM to manage customer information, orders, inventory, and marketing efforts while minimizing manual data entry.

Key user needs included:

- Easy customer data capture
- Automated order status updates and email confirmations
- Stock level tracking and low stock alerts
- Loyalty program automation

Defining Project Scope and Objectives

The scope of the project includes:

- Custom CRM application named HandsMen Threads
- Development of multiple custom objects
- End-to-end process automation for order management and loyalty programs

Data Model and Security Model

- **Objects:** HandsMen Customers, HandsMen Orders, HandsMen Products, Inventories, and Marketing Campaigns.
- **Security:** Controlled via Profiles and Roles to ensure proper access.

Stakeholders Mapping

Business Owner - Oversees CRM adoption and business requirements

Salesforce Admin - Manages configurations, automation, and permissions

Developer - Handles Apex triggers, flows, and logic

End Users - Tailoring staff managing customers and orders

Execution Roadmap

1. Requirement Analysis
2. Salesforce Environment Setup
3. Object and Field Customization
4. Automation and Flow Configuration
5. UI/UX Customization
6. Testing and Deployment

Phase 2: Salesforce Development – Backend & Configurations

Setup Environment & DevOps Workflow

- Development and testing performed in Salesforce Developer Org.
- Changes deployed via Change Sets.

Customization of Objects, Fields, and Validation Rules

- **HandsMen Customer:** Captures personal details and loyalty status.
- **HandsMen Order:** Records product, quantity, and total amount.
- **HandsMen Product:** Stores SKU, price, and availability.
- **Inventories:** Tracks product stock and warehouse details.
- **Marketing Campaign:** Manages promotions and customer outreach.

Validation Rule Example:

Ensures email address contains “@gmail.com” format.

Automation (Flows, Process Builder, Approval Process)

- **Record-Triggered Flow:** Sends order confirmation email on status change.
- **Scheduled Flow:** Updates loyalty status daily at 12:00 AM.
- **Workflow Email Alerts:** Notifies inventory manager on low stock.

Apex Classes and Triggers

- **OrderTotalTrigger:** Automatically calculates total amount = Price × Quantity.

Phase 3: UI/UX Development & Customization

Lightning App Setup

- Custom app **HandsMen Threads** created in App Manager.

Page Layouts and Dynamic Forms

- Custom layouts for Customer, Order, Product, and Inventory objects for user-friendly navigation.

User Management

- Defined Profiles and Roles to limit access based on responsibility.

Reports and Dashboards

- Created dashboards for Sales Overview, Inventory Status, and Loyalty Tiers.

Lightning Pages

- Designed custom record pages with relevant components for enhanced user experience.

Phase 4: Data Migration, Testing & Security

Data Migration

- Imported initial customer and product data using Data Import Wizard.

Testing & Field History Tracking

- Field History Tracking enabled for Orders and Inventory.
- Created Duplicate and Matching Rules for email validation.

Profiles, Roles, and Permission Sets

- **Profile:** Admin (full access)
- **Profile:** Tailor (limited to customer and order objects)

Test Classes

- Test Classes written for OrderTotalTrigger to ensure automated calculation functions correctly.

Test Cases

Each feature was tested for correct execution:

Feature	Input	Expected Output
Order Confirmation Flow	Change order to “Confirmed”	Confirmation email sent
Inventory Flow	Reduce stock below 5	Low stock alert email sent
Loyalty Flow	Total purchase \geq 1000	Status updated to “Gold”

Phase 5: Deployment, Documentation & Maintenance

Deployment Strategy

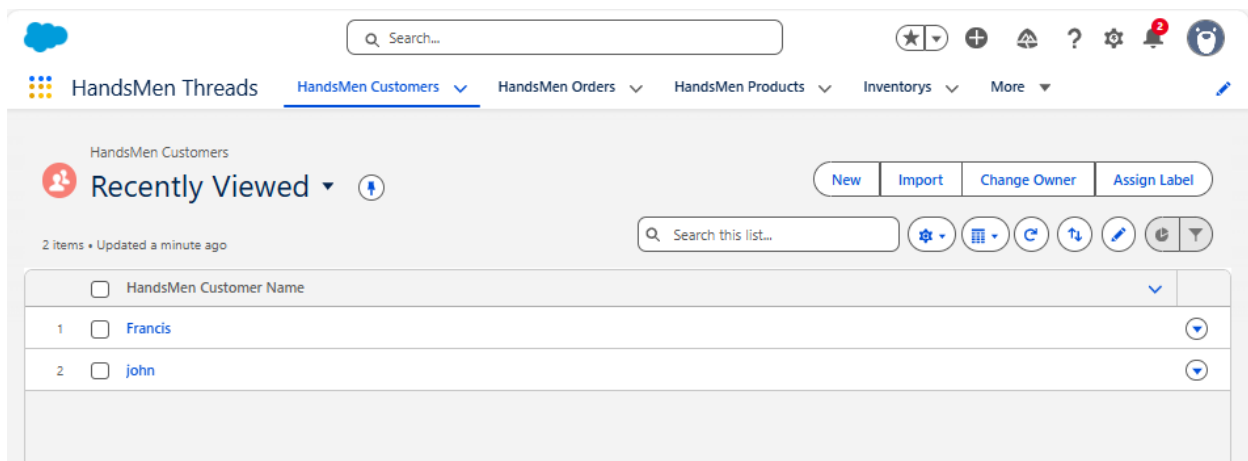
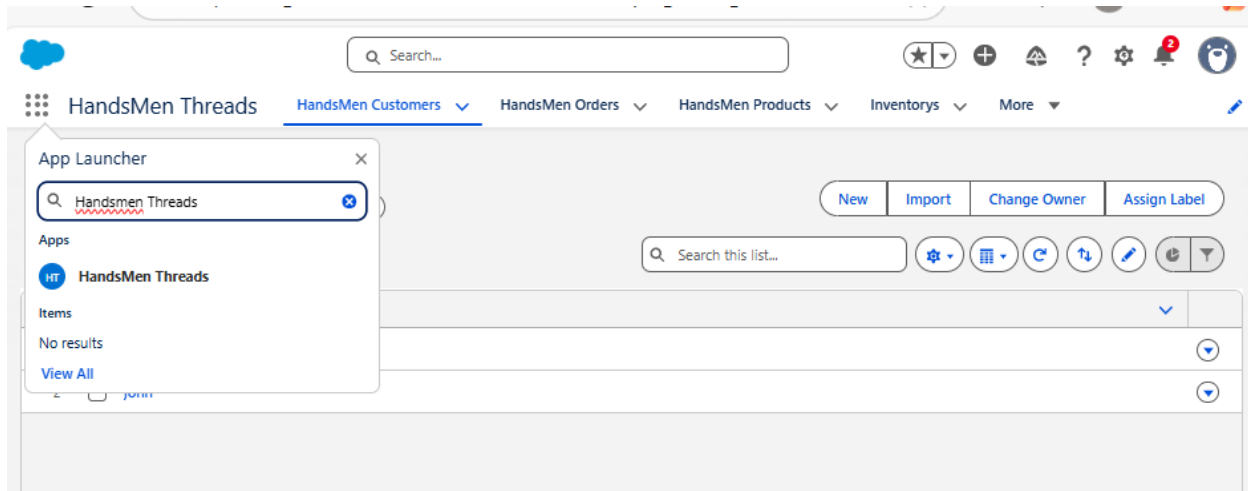
- Deployed configurations from Developer Org to Production using Change Sets.

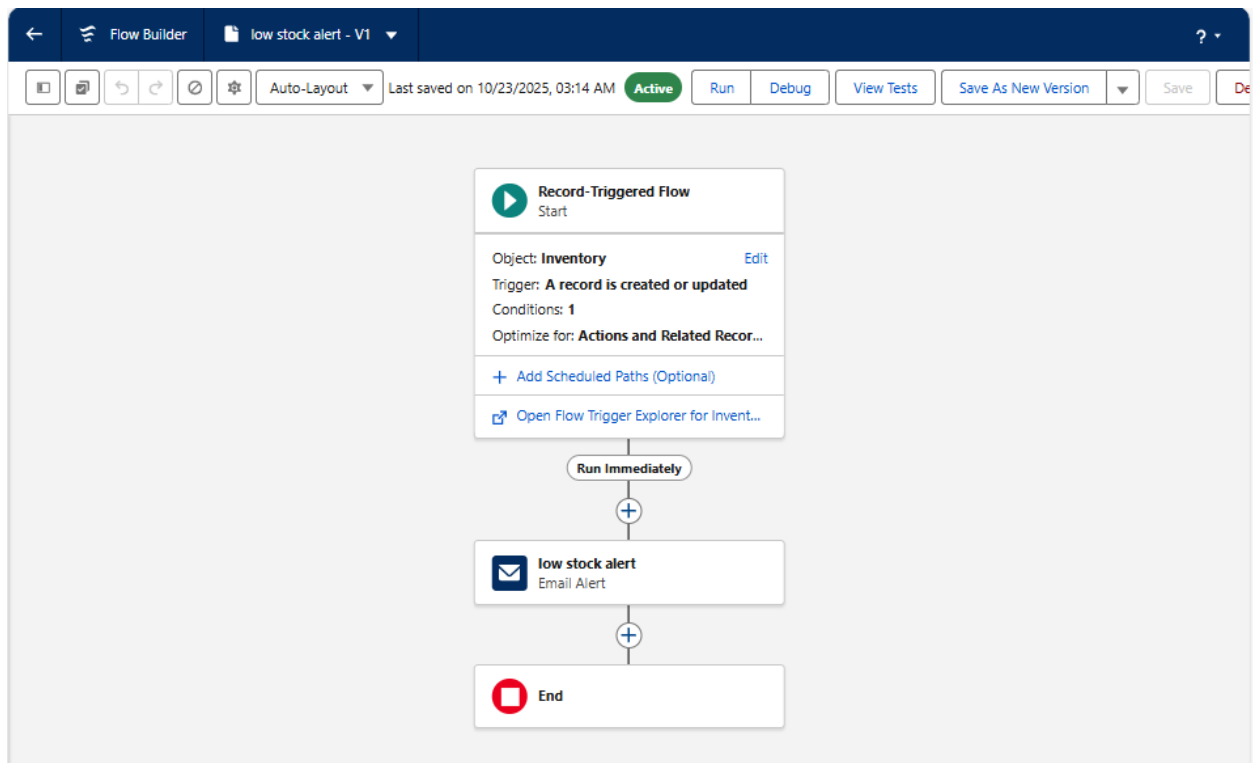
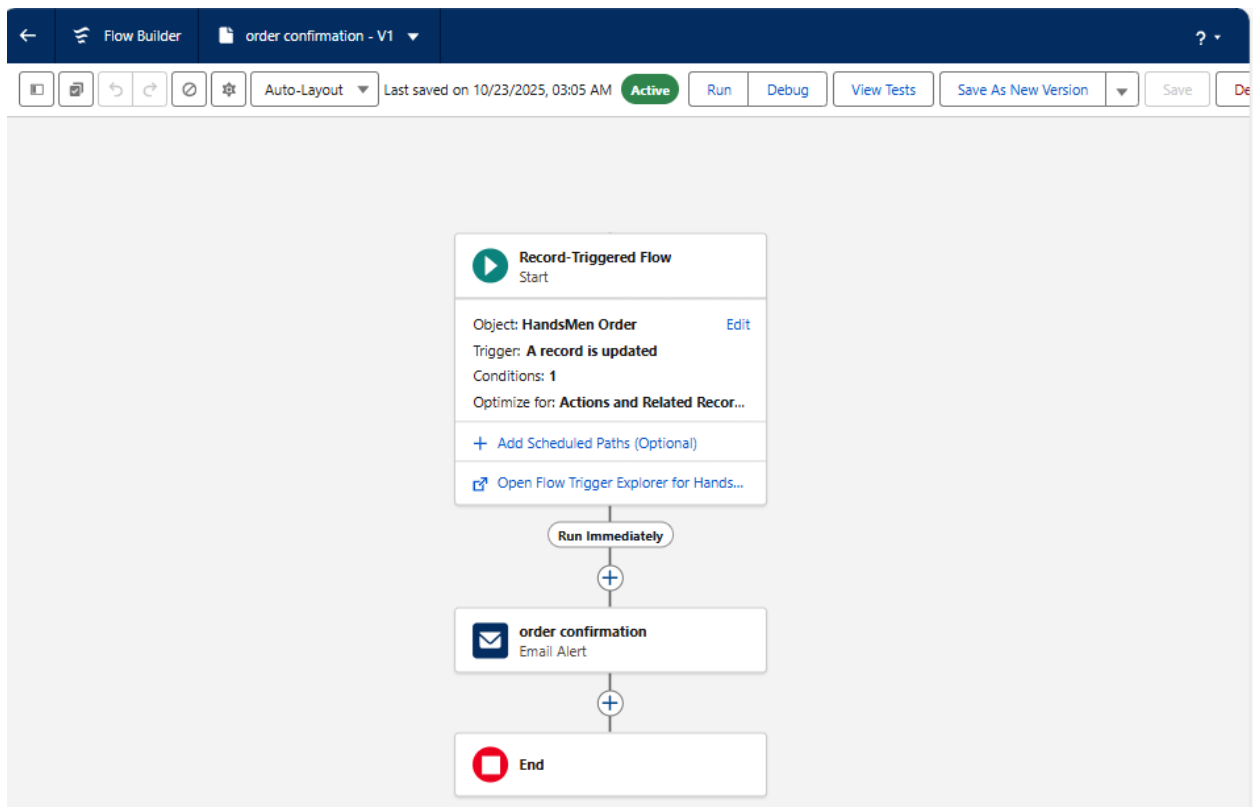
System Maintenance

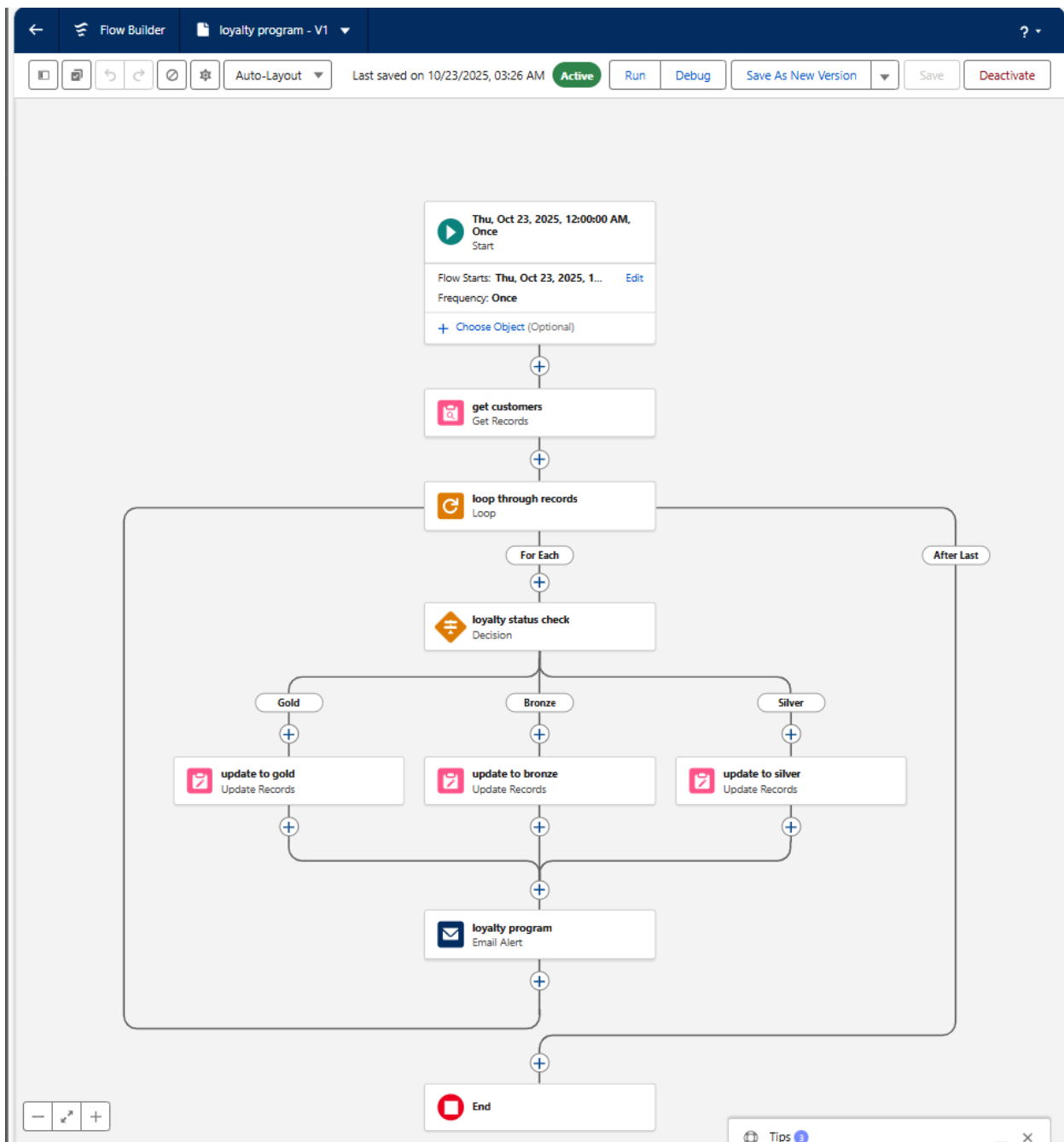
- Regular updates through scheduled jobs and admin reviews.
- Error logs monitored through Flow Debug Logs and Apex Exception Handling.

Troubleshooting Approach

- Used Salesforce Setup Audit Trail and Email Logs to identify failed flows or missing data.







```
File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < >
OrderTotalTrigger.apxt | StockDeductionTrigger.apxt
Code Coverage: None ▾ API Version: 65 ▾ Go To

1 ▾ trigger OrderTotalTrigger on HandsMen_Order__c (before insert, before update) {
2     Set<Id> productIds = new Set<Id>();
3
4 ▾     for (HandsMen_Order__c order : Trigger.new) {
5 ▾         if (order.HandsMen_Product__c != null) {
6             productIds.add(order.HandsMen_Product__c);
7         }
8     }
9
10    Map<Id, HandsMen_Product__c> productMap = new Map<Id, HandsMen_Product__c>(
11        [SELECT Id, Price__c FROM HandsMen_Product__c WHERE Id IN :productIds]
12    );
13
14 ▾    for (HandsMen_Order__c order : Trigger.new) {
15 ▾        if (order.HandsMen_Product__c != null && productMap.containsKey(order.HandsMen_Product__c)) {
16            HandsMen_Product__c product = productMap.get(order.HandsMen_Product__c);
17 ▾            if (order.Quantity__c != null) {
18                order.Total_Amount__c = order.Quantity__c * product.Price__c;
19            }
20        }
21    }
22 }
```



```
File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < >
OrderTotalTrigger.apxt StockDeductionTrigger.apxt
Code Coverage: None ▾ API Version: 65 ▾ Go To

1 ▾ trigger StockDeductionTrigger on HandsMen_Order__c (after insert, after update) {
2     Set<Id> productIds = new Set<Id>();
3
4     for (HandsMen_Order__c order : Trigger.new) {
5         if (order.Status__c == 'Confirmed' && order.HandsMen_Product__c != null) {
6             productIds.add(order.HandsMen_Product__c);
7         }
8     }
9
10    if (productIds.isEmpty()) return;
11
12    // Query related inventories based on product
13    Map<Id, Inventory__c> inventoryMap = new Map<Id, Inventory__c>(
14        [SELECT Id, Stock_Quantity__c, HandsMen_Product__c
15         FROM Inventory__c
16         WHERE HandsMen_Product__c IN :productIds]
17    );
18
19    List<Inventory__c> inventoriesToUpdate = new List<Inventory__c>();
20
21    for (HandsMen_Order__c order : Trigger.new) {
22        if (order.Status__c == 'Confirmed' && order.HandsMen_Product__c != null) {
23            for (Inventory__c inv : inventoryMap.values()) {
24                if (inv.HandsMen_Product__c == order.HandsMen_Product__c) {
25                    inv.Stock_Quantity__c -= order.Quantity__c;
26                    inventoriesToUpdate.add(inv);
27                    break;
28                }
29            }
30        }
31    }
32
33    if (!inventoriesToUpdate.isEmpty()) {
34        update inventoriesToUpdate;
35    }
36 }
```

HandsMen Customers

Recently Viewed

NewImportChange OwnerAssign Label

2 items • Updated 7 minutes ago

Search this list...

HandsMen Customer Name

1Francis

2John

New HandsMen Customer

* = Required Information

Information

* HandsMen Customer Name

Email

Phone

Loyalty Status

--None--

FirstName

LastName

Total Purchases

Owner

Dave Kyle Ellard Basbas

Cancel

Save & New

Save



HandsMen Customer

Francis

[New C](#)

Related

[Details](#)

HandsMen Customer Name

Francis



Owner



[Dave Kyle Ellard Basbas](#)



Email

francis@gmail.com



Phone



Loyalty Status



FirstName

F



LastName

Sularta



FullName

F Sularta

Total Purchases

500



Created By



[Dave Kyle Ellard Basbas](#), 10/23/2025, 7:42 AM

Last Modified By



[Dave Kyle Ellard Basbas](#), 10/23/2025, 8:34 AM

HandsMen Threads

HandsMen Customers

HandsMen Orders

HandsMen Products

Inventorys

More

HandsMen Orders

Recently Viewed

New

Import

Change Owner

Assign Label

Search this list...

HandsMen OrderNumber

1

O-0004

2

O-0002

3

O-0003

4

O-0001

4 Items • Updated a few seconds ago

New HandsMen Order

* = Required Information

Information

HandsMen OrderNumber

Owner

HandsMen Product

HandsMen Customer

Status

Quantity

Total Amount

* Customer Email

Dave Kyle Ellard Basbas

Search HandsMen Products...


Search HandsMen Customers...

--None--

Cancel

Save & New

Save





Q Search...

★

+

?





HandsMen Threads


HandsMen Customers

HandsMen Orders

HandsMen Products

Inventories

More

HandsMen Order

O-0004

New Contact

Edit

New Opportunity


Related

Details

HandsMen OrderNumber


O-0004

Owner

 [Dave Kyle Ellard Basbas](#)


HandsMen Product

[Shirt](#)




HandsMen Customer

[Francis](#)




Status

Confirmed




Quantity

20




Total Amount

60




Customer Email


[davekylebasbas@gmail.com](#)



Created By

 [Dave Kyle Ellard Basbas](#), 10/23/2025, 7:51 AM

Last Modified By

 [Dave Kyle Ellard Basbas](#), 10/23/2025, 8:01 AM

HandsMen Threads

HandsMen Customers

HandsMen Orders

HandsMen Products

Inventories

More

HandsMen Products

Recently Viewed

NewImportChange OwnerAssign Label

2 items • Updated a few seconds ago

Search this list...

HandsMen Product Name

1Shirt

2T-shirt cloth

New HandsMen Product

* = Required Information

Information

* HandsMen Product Name

SKU

Price

Stock Quantity

Owner

Dave Kyle Ellard Basbas

Cancel

Save & New

Save

HandsMen Threads

HandsMen Customers

HandsMen Orders

HandsMen Products

Inventories

More

HandsMen Product

Shirt

New ContactEditNew Opportunity

Related

Details

HandsMen Product Name

Shirt

SKU

0001

Price

\$3

Stock Quantity

200

Created By

Dave Kyle Ellard Basbas, 10/23/2025, 7:43 AM

Owner

Dave Kyle Ellard Basbas

Last Modified By

Dave Kyle Ellard Basbas, 10/23/2025, 7:43 AM

2 items • Updated a few seconds ago

	<input type="checkbox"/>	Inventory Number	
1	<input type="checkbox"/>	I -0002	
2	<input type="checkbox"/>	I -0001	

New Inventory

* = Required Information

Information

Inventory Number

* HandsMen Product


Stock Quantity

Warehouse

Cancel

Save & New

Save



★

+

?

HandsMen Threads

HandsMen Customers

HandsMen Orders

HandsMen Products

Inventories

More

Inventory

I -0002

New Contact

Edit

New Opportunity

Related

Details

Inventory Number

I -0002

HandsMen Product

[Shirt](#)

Stock Quantity

4

Stock Status

Low Stock

Warehouse

xyz

Created By

[Dave Kyle Ellard Basbas](#), 10/23/2025, 7:47 AM

Last Modified By

[Dave Kyle Ellard Basbas](#), 10/23/2025, 8:18 AM

Loyalty Program Email Spam x



OrgFarm EPIC <epic.orgfarm@salesforce.com>
to me ▾

Thu, Oct 23, 3:28 AM (1 day ago)



Why is this message in spam? This message is similar to messages that were identified as spam in the past.

Report not spam



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.

Your Order has been Confirmed Spam x



Dave Kyle Ellard Basbas via [3v8rp kz6siuz.g5-xzzbeas.ind168.bnc.s...](#) Thu, Oct 23, 11:01PM (19 hours ago)
to me ▾



Why is this message in spam? This message is similar to messages that were identified as spam in the past.

Report not spam



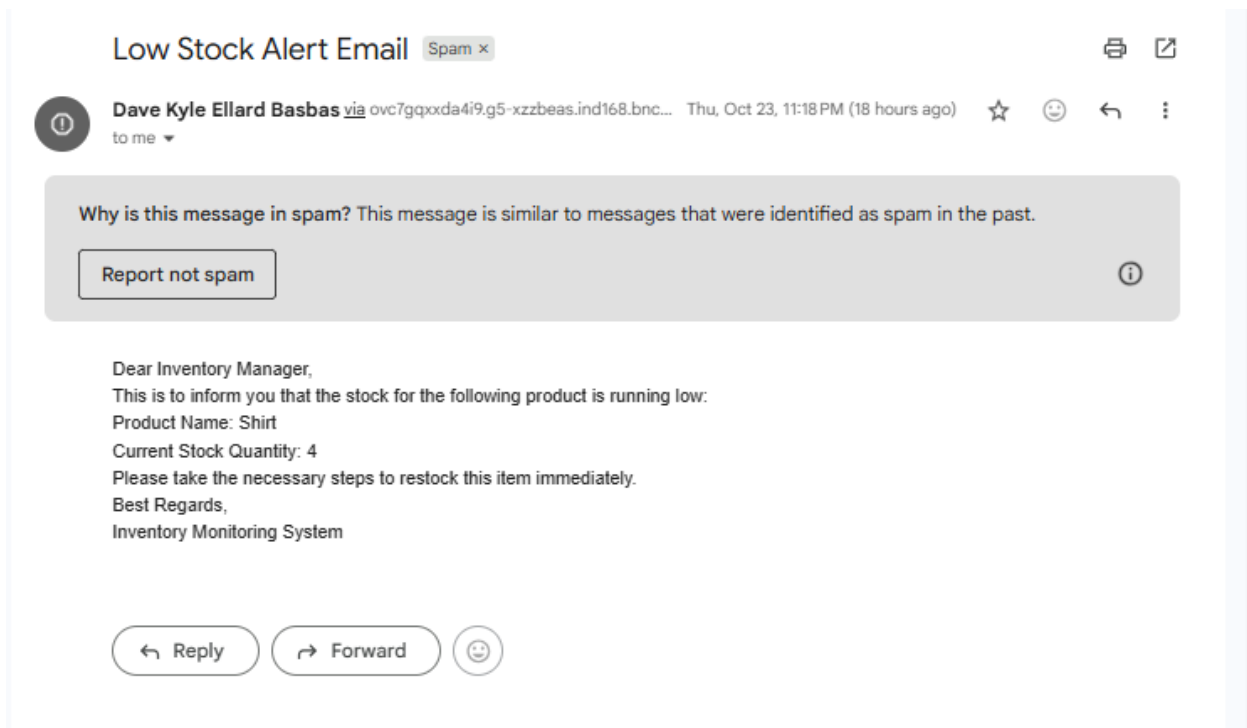
Dear Francis,

Your order #O-0004 has been confirmed!

Thank you for shopping with us.

Best Regards,

Sales Team



Conclusion

The HandsMen Threads Salesforce CRM successfully demonstrates the capabilities of Salesforce in transforming traditional business operations into a modern digital experience.

Through the use of **custom objects**, **flows**, **Apex triggers**, and **automations**, the project streamlined customer management, optimized order handling, and introduced a data-driven loyalty program.

This implementation not only fulfills the business goals but also sets a foundation for future scalability and innovation.

Future Enhancements

- Integration with AI-driven chatbot for customer support.
- Predictive analytics for product demand.
- Enhanced marketing automation through Salesforce Marketing Cloud.