

HandsMenThreads: Elevating Men's Fashion with Salesforce

Phase 1: Problem Understanding & Industry Analysis

Requirement Gathering

HandsMen Threads, a leading men's fashion brand, faced challenges in managing customers, processing orders, optimizing inventory, and scaling marketing efforts. The business needed a unified CRM to automate processes, maintain data integrity, and provide real-time operational insights.

Stakeholder Analysis

Key stakeholders included sales representatives, inventory managers, marketing teams, and customers. Each group had unique requirements for data access, process automation, and reporting.

Business Process Mapping

Mapped out the end-to-end business processes:

- Customer onboarding and management
- Product and inventory tracking
- Order processing and fulfillment
- Marketing campaign management
- Customer loyalty tracking

Industry-Specific Use Case Analysis

The solution was tailored for the retail fashion industry, focusing on high-volume order management, inventory accuracy, and personalized customer engagement.

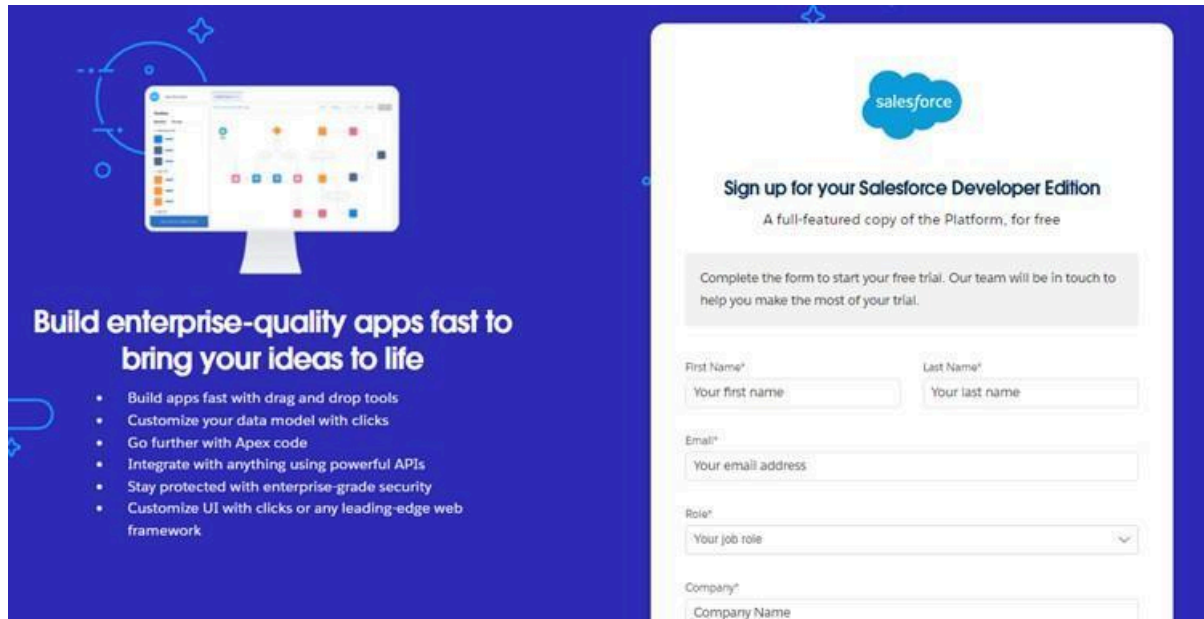
AppExchange Exploration

While the project primarily leveraged custom development, AppExchange was explored for potential add-ons. However, the core solution was built natively within Salesforce for maximum customization.

Phase 2: Org Setup & Configuration

Salesforce Editions & Developer Org Setup

A new Salesforce Developer Org was set up via developer.salesforce.com/signup, serving as the main environment for all development and testing.

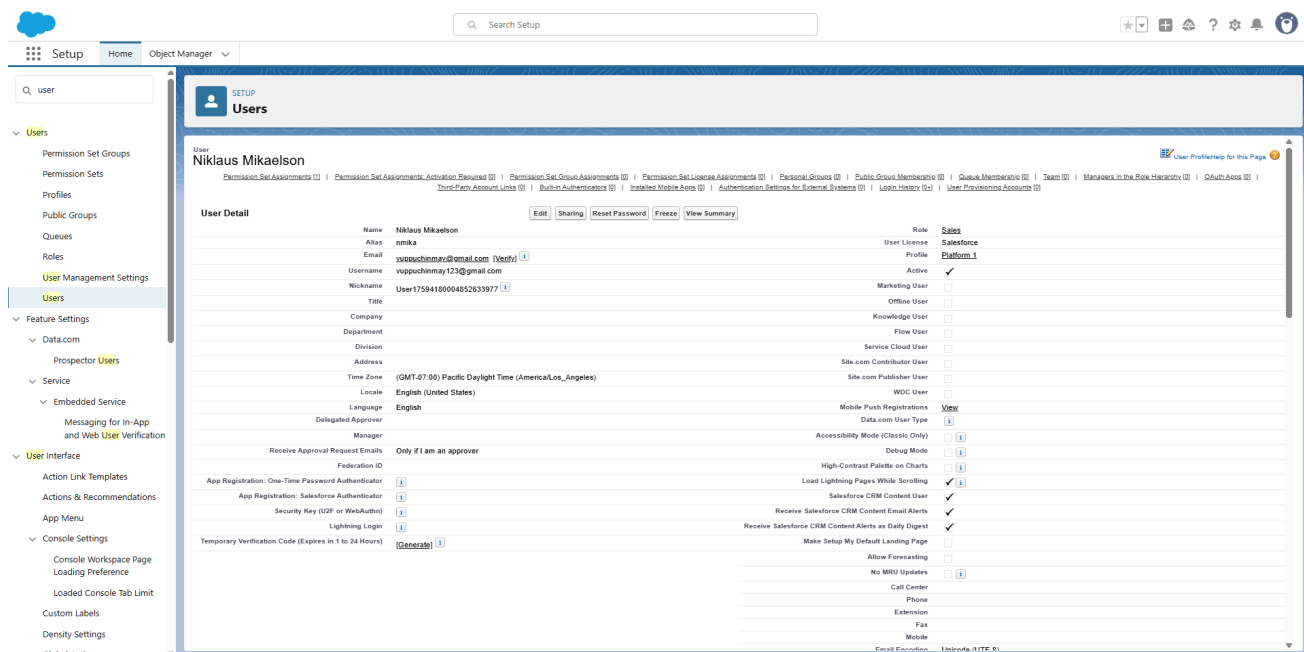


Company Profile Setup

Company information, business hours, and fiscal year settings were configured to match HandsMen Threads' operational calendar.

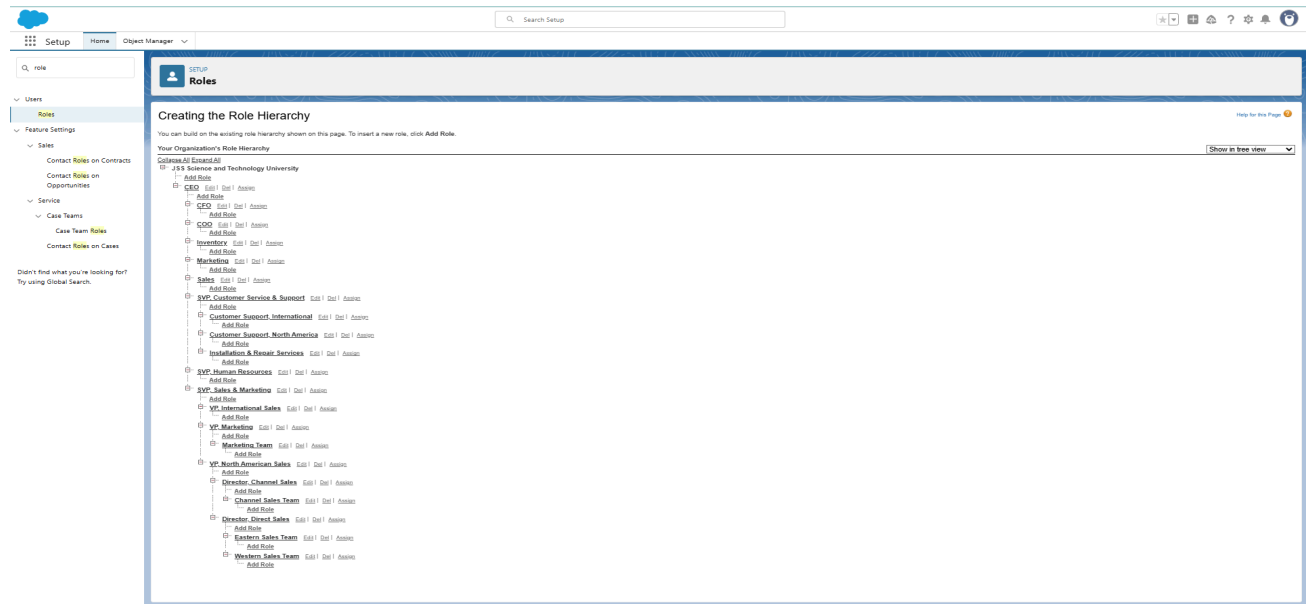
User Setup & Licenses

Users were created for different roles (e.g., sales, inventory, marketing), each assigned appropriate licenses.

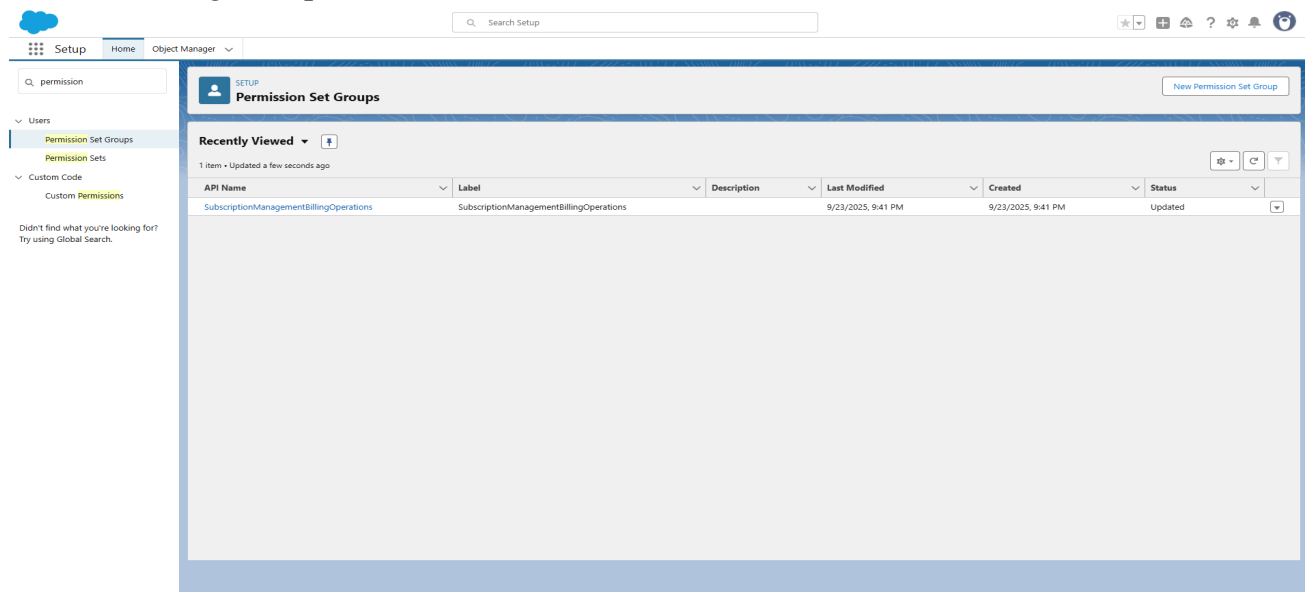


Profiles, Roles, and Permission Sets

- **Profiles:** Custom profiles like "HandsMen Sales Profile" were created by cloning the Standard User profile and tailoring permissions.
- **Roles:** A hierarchy was established (e.g., Sales Manager, Inventory Manager) to control data visibility.



- **Permission Sets:** Used to grant additional access (e.g., to specific objects or fields) without altering base profiles.










Phase 3: Data Modeling & Relationships


Standard & Custom Objects

Custom objects were created to model the business:

- HandsMen_Customer__c: Stores customer details and loyalty status.
- HandsMen_Product__c: Manages product catalog, pricing, and stock.
- HandsMen_Order__c: Tracks customer orders, linking to both Customer and Product.
- Marketing_Campaign__c: Records marketing initiatives.
- Inventory__c: To manage the inventory status.


Setup
Home
Object Manager



SETUP

Object Manager

52+ Items, Sorted by Last Modified

[Schema Builder](#)
[Create](#)

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
HandsMen Product	HandsMen_Product__c	Custom Object		10/2/2025	✓
Marketing Campaign	Marketing_Campaign__c	Custom Object		10/2/2025	✓
Inventory	Inventory__c	Custom Object		10/2/2025	✓
HandsMen Order	HandsMen_Order__c	Custom Object		10/2/2025	✓
HandsMen Customer	HandsMen_Customer__c	Custom Object		10/2/2025	✓

Fields, Record Types, and Page Layouts

Each object was configured with relevant fields (e.g., Email, Stock, Total_Amount__c), and page layouts were customized for user efficiency.

Relationships

- **Lookup Relationships:** Orders link to Customers and Products.
- **Validation Rules:** Prevent negative stock and enforce email format (must contain "@gmail.com").

Tabs & Custom App

Custom tabs for each object were added to a new Lightning App, "*HandsMen Threads*," providing a unified workspace.

HandMen Threads
HandMen Customers
HandMen Orders
HandMen Products
Inventory
Marketing Campaigns
Reports
Dashboards
Accounts
Contacts

Phase 4: Process Automation (Admin)

Validation Rules

- **Inventory Stock:** Prevents S_c from dropping below zero.

The screenshot shows the Salesforce Setup interface for the 'Inventory' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, and Validation Rules. The main content area is titled 'Inventory Validation Rule' and displays the details of a validation rule named 'Stock_Quantity'. The rule is active and has the condition formula $S_c \leq 0$. The error message is 'the inventory count is never less than zero.' and the error location is 'Top of Page'. The rule was created by Yusep Chinnay on 10/2/2025 at 8:04 AM.

Setup > OBJECT MANAGER
Inventory

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
Object Access
Triggers
Flow Triggers
Validation Rules
Conditional Field Formatting

Inventory Validation Rule
[Back to Inventory](#)

Validation Rule Detail [Edit](#) [Clone](#)

Rule Name	Stock_Quantity	Active	✓
Error Condition Formula	$S_c \leq 0$	Error Location	Top of Page
Error Message	the inventory count is never less than zero.		
Description		Modified By	Yusep Chinnay: 10/2/2025, 8:04 AM
Created By	Yusep Chinnay: 10/2/2025, 8:04 AM		

[Edit](#) [Clone](#)

- **Customer Email:** Ensures only Gmail addresses are accepted.

The screenshot shows the Salesforce Setup interface for the 'HandsMen Customer' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, and Validation Rules. The main content area is titled 'HandsMen Customer Validation Rule' and displays the details of a validation rule named 'Email'. The rule is active and has the condition formula $NOT\ CONTAINS(Email_c, '@gmail.com')$. The error message is 'Please fill Correct Gmail' and the error location is 'Top of Page'. The rule was created by Yusep Chinnay on 10/2/2025 at 8:05 AM.

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
Object Access
Triggers
Flow Triggers
Validation Rules
Conditional Field Formatting

HandsMen Customer Validation Rule
[Back to HandsMen Customer](#)

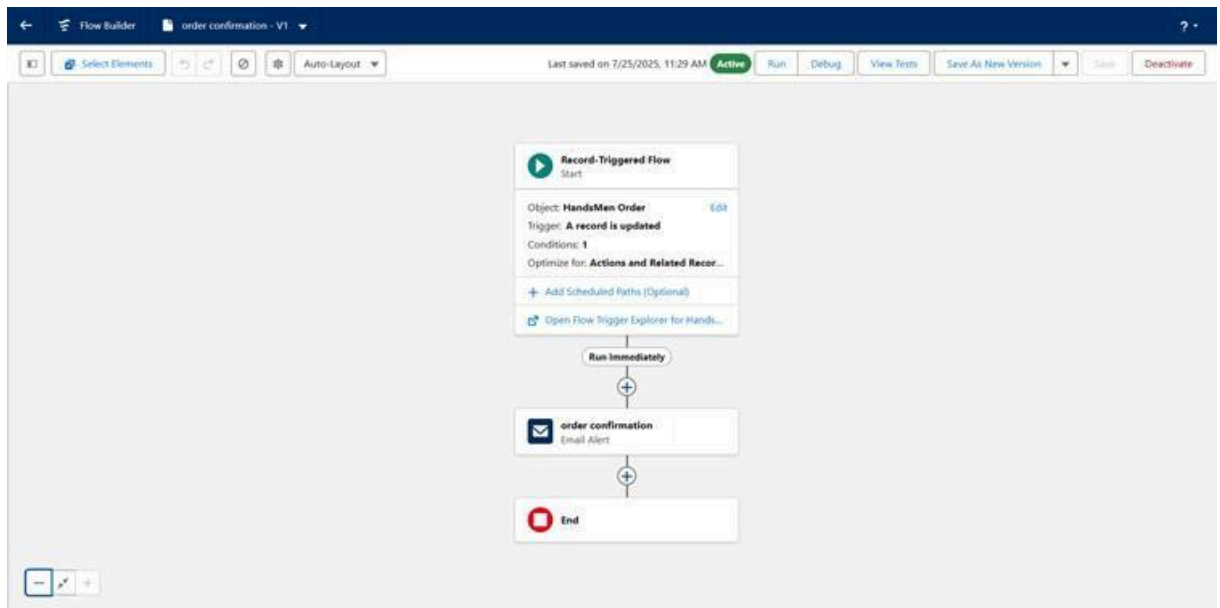
Validation Rule Detail [Edit](#) [Clone](#)

Rule Name	Email	Active	✓
Error Condition Formula	$NOT\ CONTAINS(Email_c, '@gmail.com')$	Error Location	Top of Page
Error Message	Please fill Correct Gmail		
Description		Modified By	Yusep Chinnay: 10/2/2025, 8:05 AM
Created By	Yusep Chinnay: 10/2/2025, 8:05 AM		

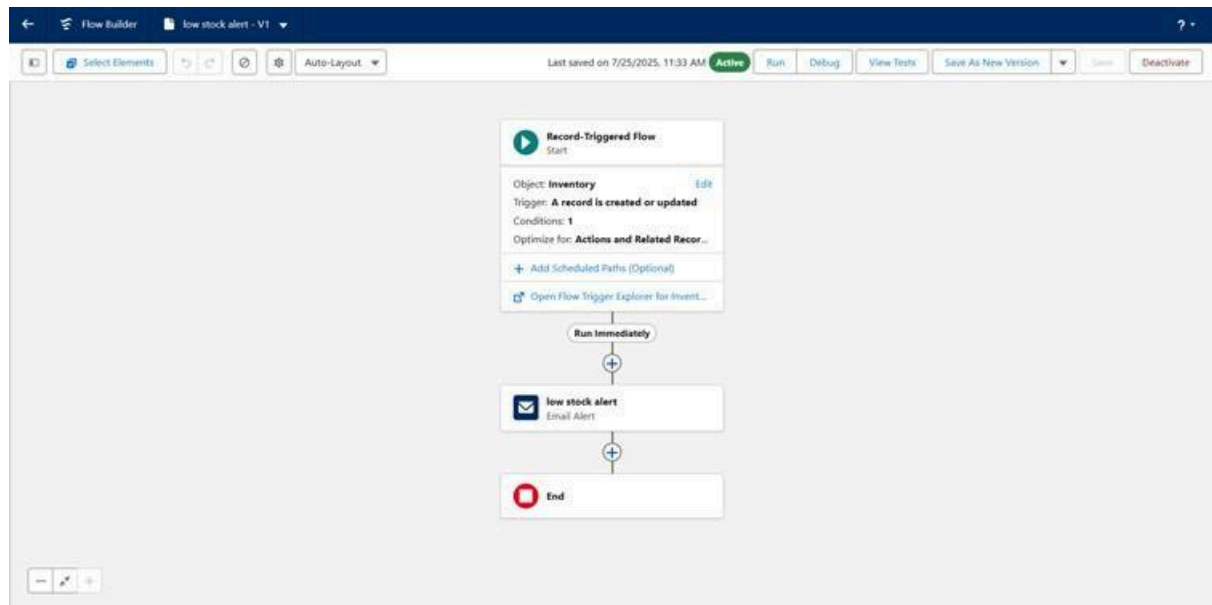
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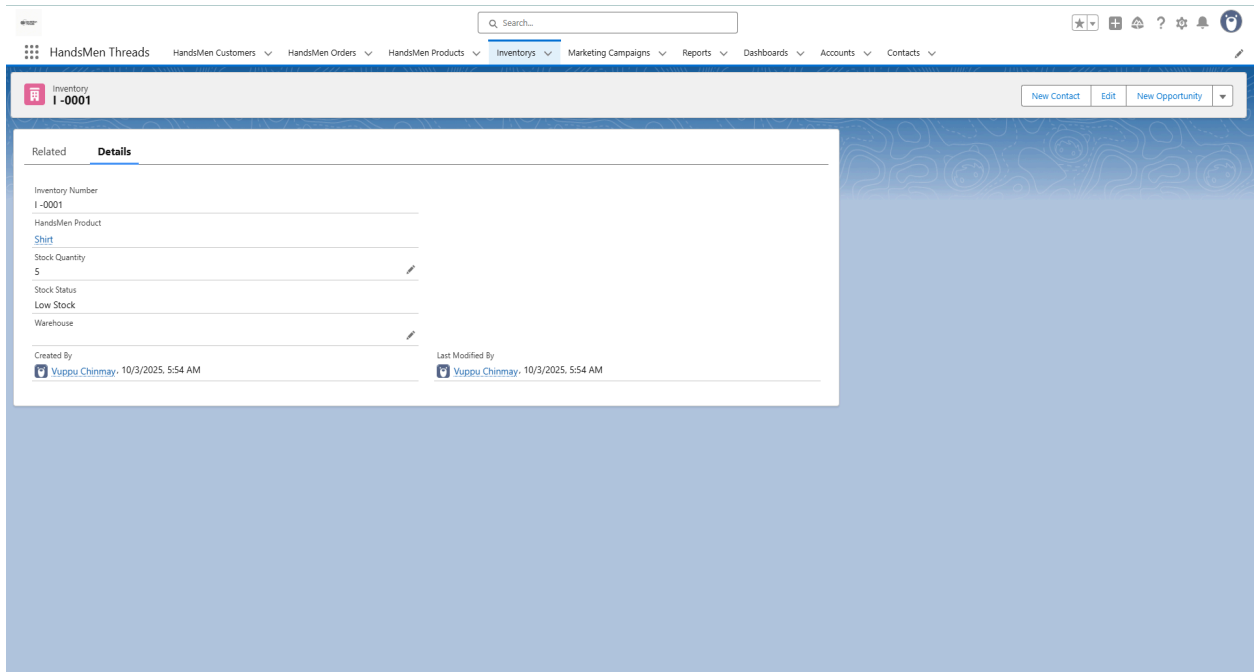
Flows

- **Email Notification Flow:** Sends order confirmation emails upon new order creation.

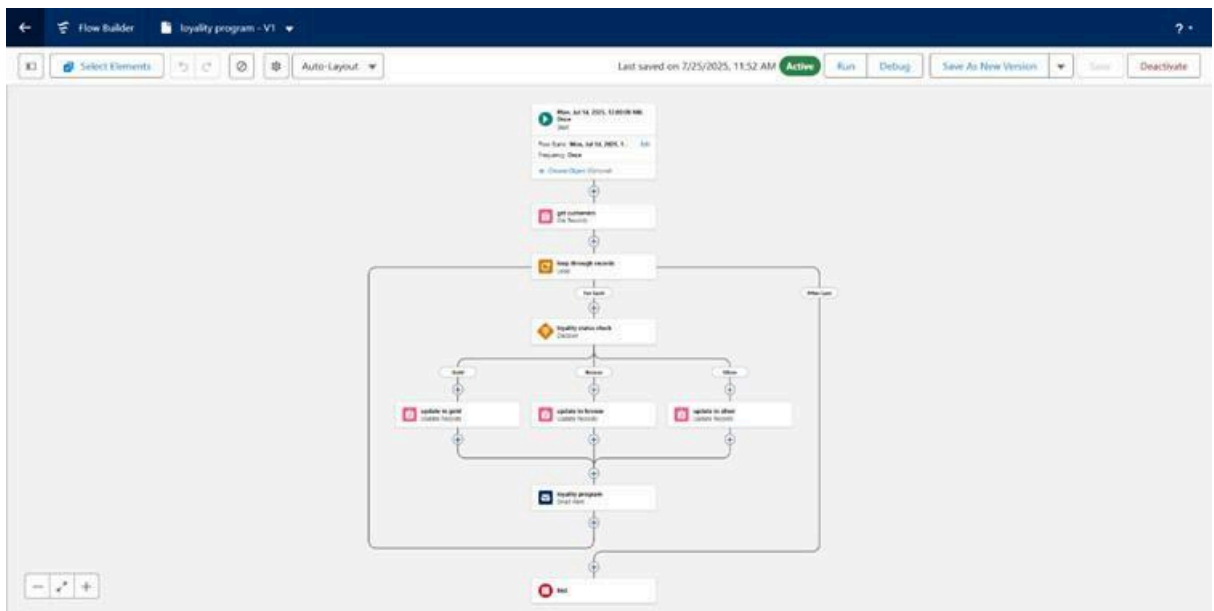


- **Stock Update Flow:** Automatically updates product stock when orders are placed or modified.



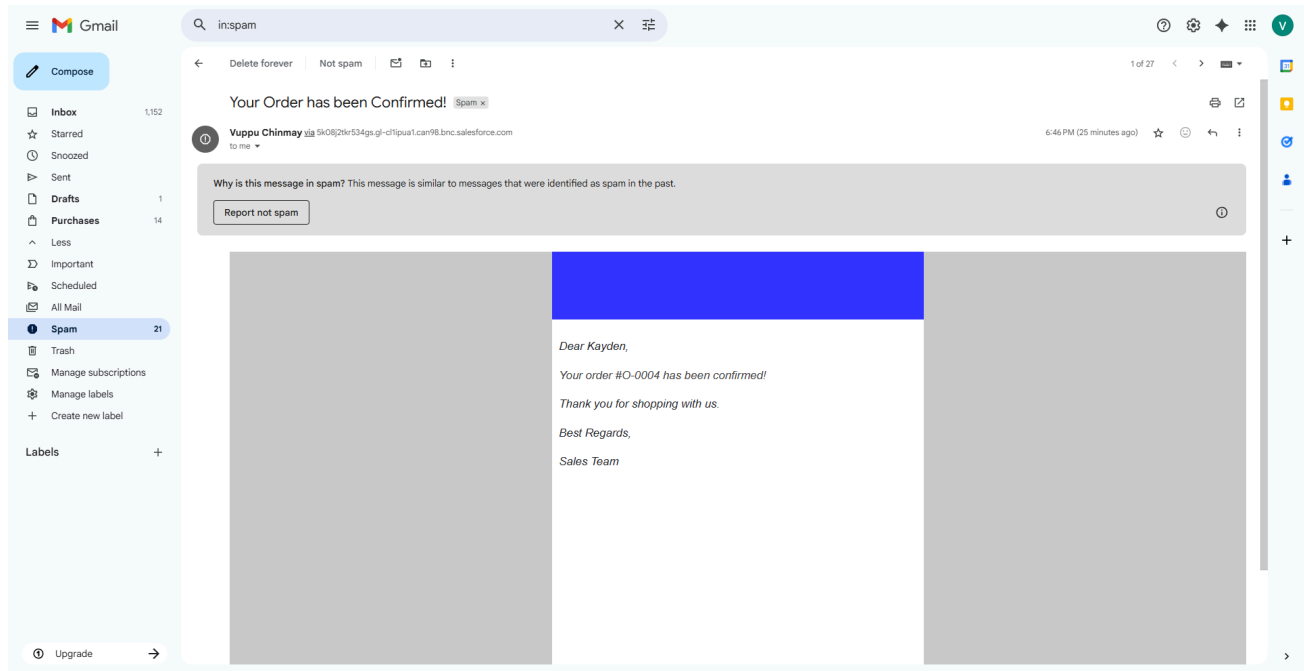


- **Scheduled Loyalty Update Flow:** Runs daily to update customer loyalty status based on purchase history.

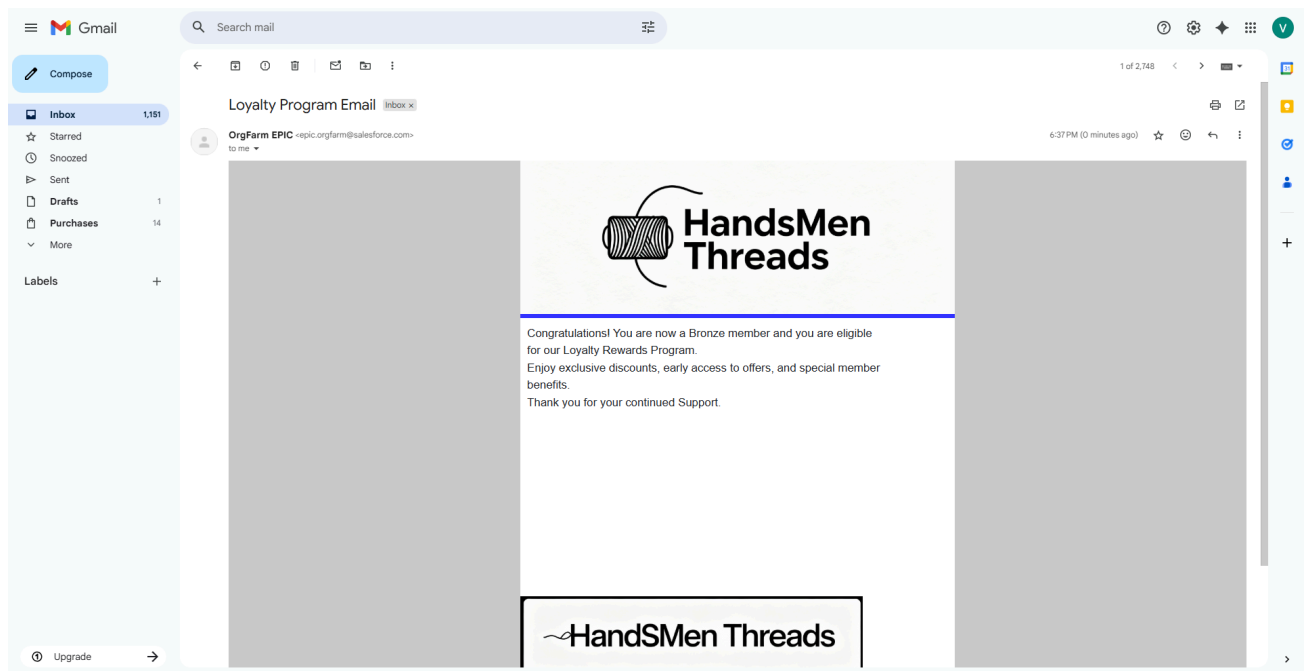


Email Templates & Alerts

- **Order Confirmation:** Automated, branded emails sent to customers.



- **Loyalty Status Update:** Notifies customers when their loyalty status changes.

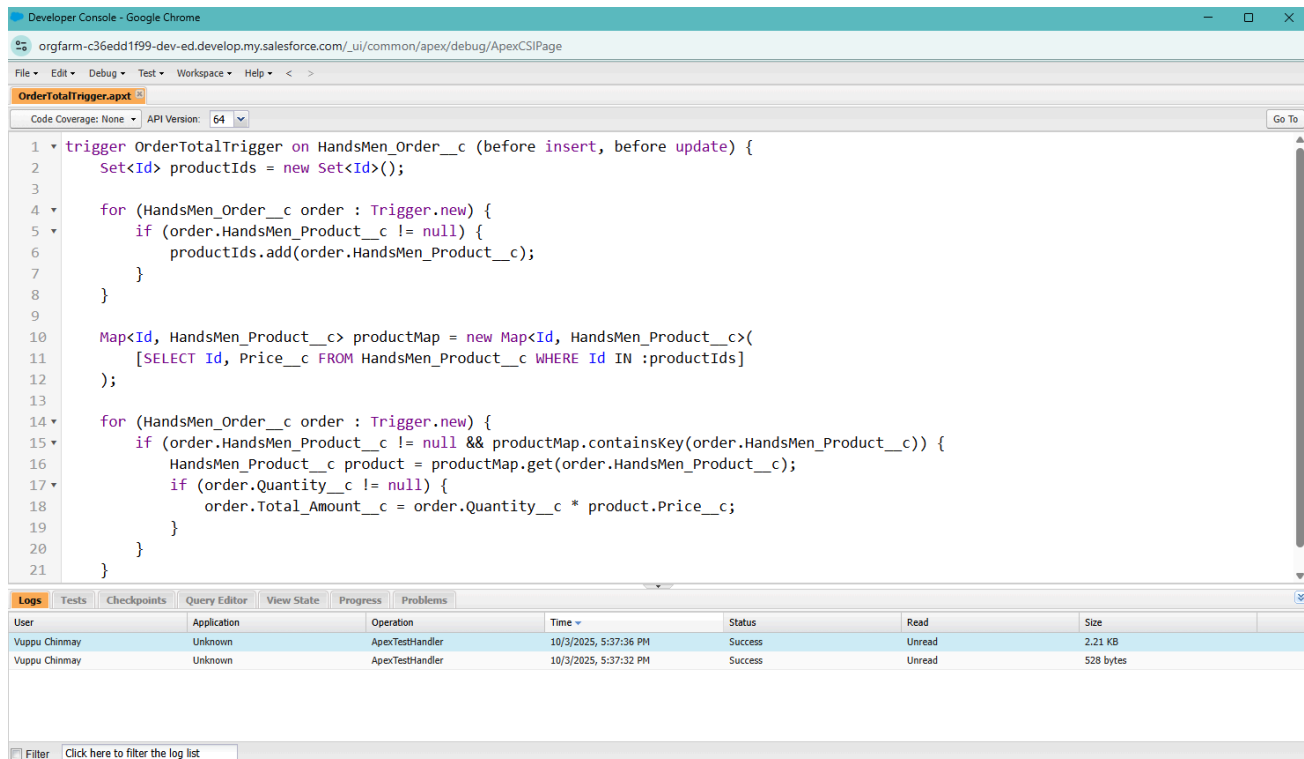


Phase 5: Apex Programming (Developer)

Apex was used in the HandsMen Threads project to handle business logic that could not be achieved with point-and-click tools alone. Here's how Apex was specifically implemented:

Order Total Trigger

- **What it does:** Automatically calculates and updates the Total_Amount__c field on an order.
Example: If a sales rep creates an order for a product, the trigger multiplies the quantity by the unit price and updates the order record with the correct total.
- **Why it matters:** Ensures the order total is always accurate and eliminates manual calculation errors.



```
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    }
```

User	Application	Operation	Time	Status	Read	Size
Vuppu Chinmay	Unknown	ApexTestHandler	10/3/2025, 5:37:36 PM	Success	Unread	2.21 KB
Vuppu Chinmay	Unknown	ApexTestHandler	10/3/2025, 5:37:32 PM	Success	Unread	528 bytes

Stock Deduction Trigger

- **What it does:** Ensures that when an order is confirmed, the product's stock is reduced by the ordered quantity.
Example: If there are 10 suits in stock and an order for 1 suit is placed, the stock is automatically updated to 9.
- **Why it matters:** Keeps inventory levels accurate and works with validation rules to prevent overselling.

Developer Console - Google Chrome

orgfarm-c36edd1f99-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage

File Edit Debug Test Workspace Help < >

StockDeductionTrigger.apxt

Code Coverage: None API Version: 64 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, S__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) {

```

Logs Tests Checkpoints Query Editor View State Progress Problems

User	Application	Operation	Time	Status	Read	Size
Vuppu Chinmay	Unknown	ApexTestHandler	10/3/2025, 5:38:26 PM	Success	Unread	2.21 KB
Vuppu Chinmay	Unknown	ApexTestHandler	10/3/2025, 5:38:26 PM	Success	Unread	518 bytes
Vuppu Chinmay	Unknown	ApexTestHandler	10/3/2025, 5:37:36 PM	Success	Unread	2.21 KB
Vuppu Chinmay	Unknown	ApexTestHandler	10/3/2025, 5:37:32 PM	Success	Unread	528 bytes

Filter Click here to filter the log list

Loyalty Status Trigger

- What it does:** Updates the Loyalty_Status__c field on the customer record in real time, based on their cumulative purchase history.
Example: If a customer's total purchases cross a certain threshold, their loyalty status is upgraded.
- Why it matters:** Ensures customers are rewarded for their loyalty as soon as they qualify, enhancing customer satisfaction.

Developer Console - Google Chrome

orgfarm-c36edd1f99-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage

File Edit Debug Test Workspace Help < >

InventoryBatchJob.apxc

Code Coverage: None API Version: 64 Go To

```

1 global class InventoryBatchJob implements Database.Batchable<Object>, Schedulable {
2
3     global Database.QueryLocator start(Database.BatchableContext BC) {
4
5         return Database.getQueryLocator(
6
7             'SELECT Id, Stock_Quantity__c FROM Product__c WHERE Stock_Quantity__c < 10'
8
9         );
10    }
11
12    global void execute(Database.BatchableContext BC, List<Object> records) {
13
14        List<HandsMen_Product__c> productsToUpdate = new List<HandsMen_Product__c>();
15
16        // Cast Object list to Product__c list
17
18        for (Object record : records) {
19
20            HandsMen_Product__c product = (HandsMen_Product__c) record;
21

```

Logs Tests Checkpoints Query Editor View State Progress Problems

User	Application	Operation	Time	Status	Read	Size
Vuppu Chinmay	Unknown	ApexTestHandler	10/3/2025, 5:42:42 PM	Success	Unread	520 bytes
Vuppu Chinmay	Unknown	ApexTestHandler	10/3/2025, 5:42:42 PM	Success	Unread	2.21 KB

Filter Click here to filter the log list

Phase 6: User Interface Development

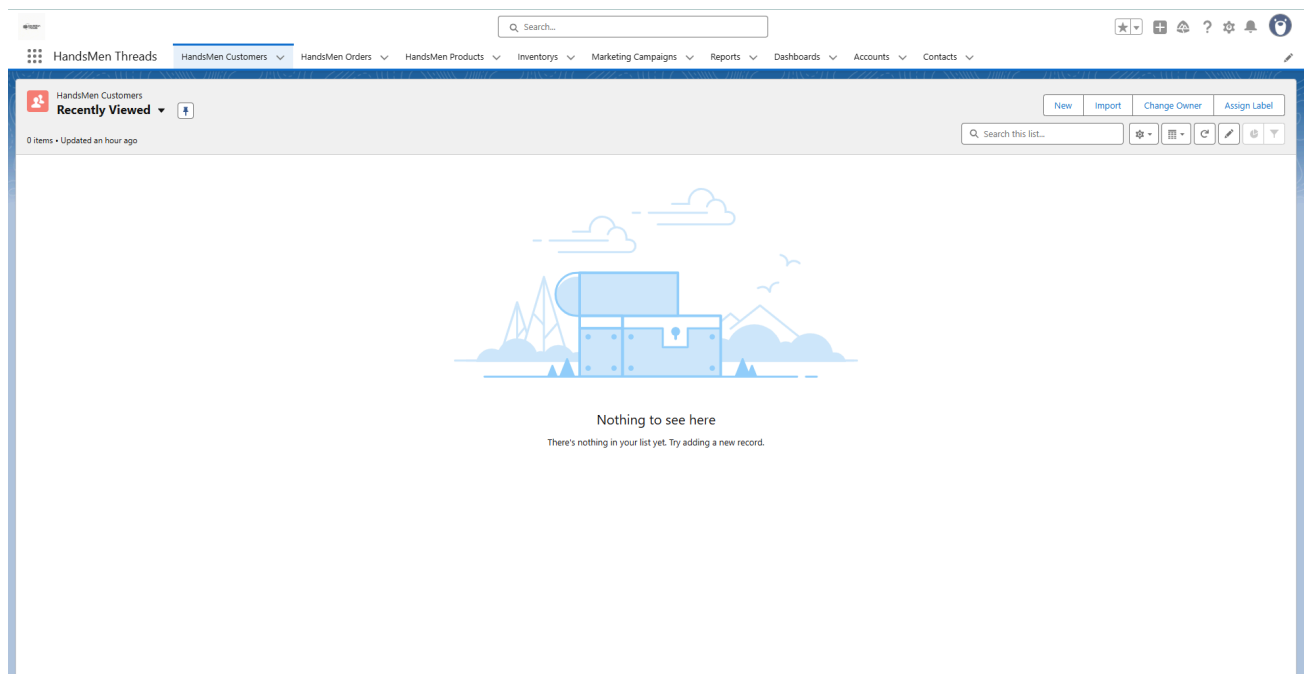
The user interface was designed to make the system easy and efficient for all users.

Lightning App Builder & Custom App

- **What was built:** A custom Lightning App called "*HandsMen Threads*" was created. This app brings together all the relevant tabs—Customer, Order, Product, Inventory, Campaign, and Reports—into one place.
- **Why it matters:** Centralizes all business operations, making it easy for users to navigate and manage their work.

Tabs

- **What was done:** Custom tabs were created for each custom object (Customer, Product, Order, Marketing Campaign).
- **Why it matters:** Allows users to quickly access and manage records for each business area.



Record Pages

- **What was done:** Each object has its own record page, showing all the important information and related records.
- **Why it matters:** Makes it easy for users to see everything they need at a glance.

Phase 7: Integration & External Access

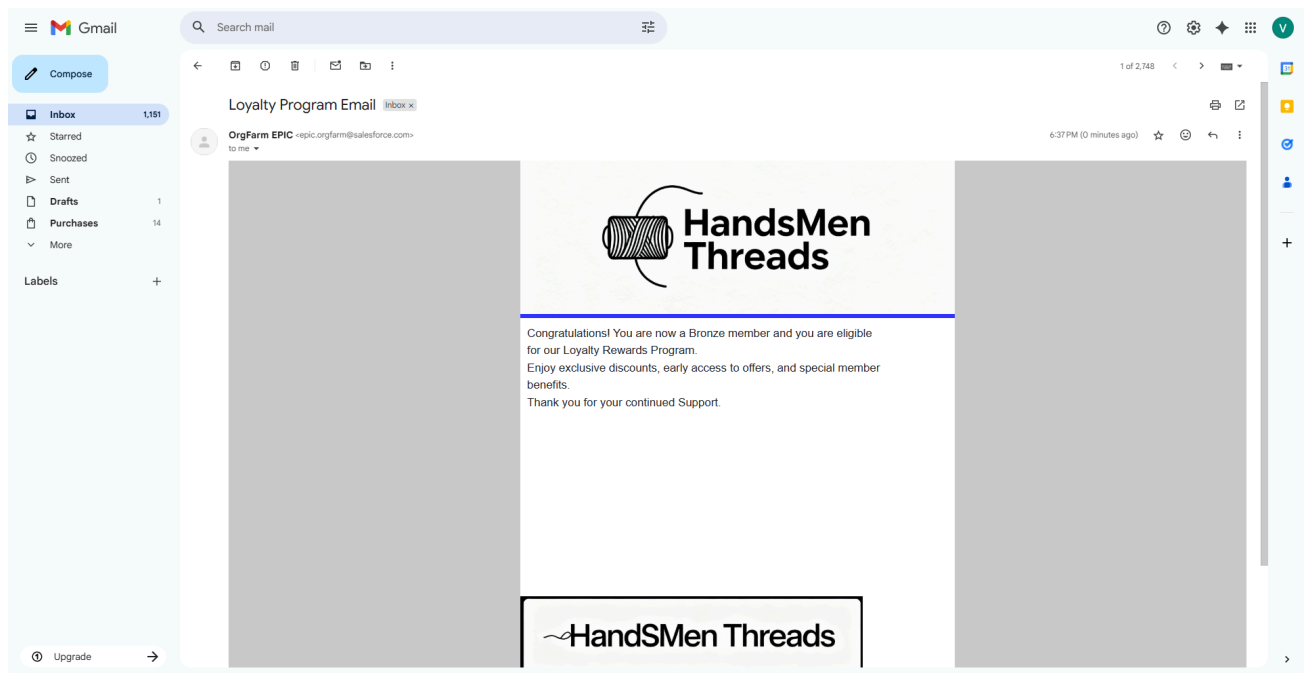
This phase was not directly implemented in the current project, but the document outlines future possibilities.

Customer Portal

- **What is planned:** A portal where customers can log in, view orders, track loyalty points, and get support.

Messaging Integration

- **What is planned:** Integration with messaging apps like SMS for real-time notifications.



- The current project follows the mentioned format for real time notifications ie. emails. Though it was not implemented now it does has an opening towards this innovation.

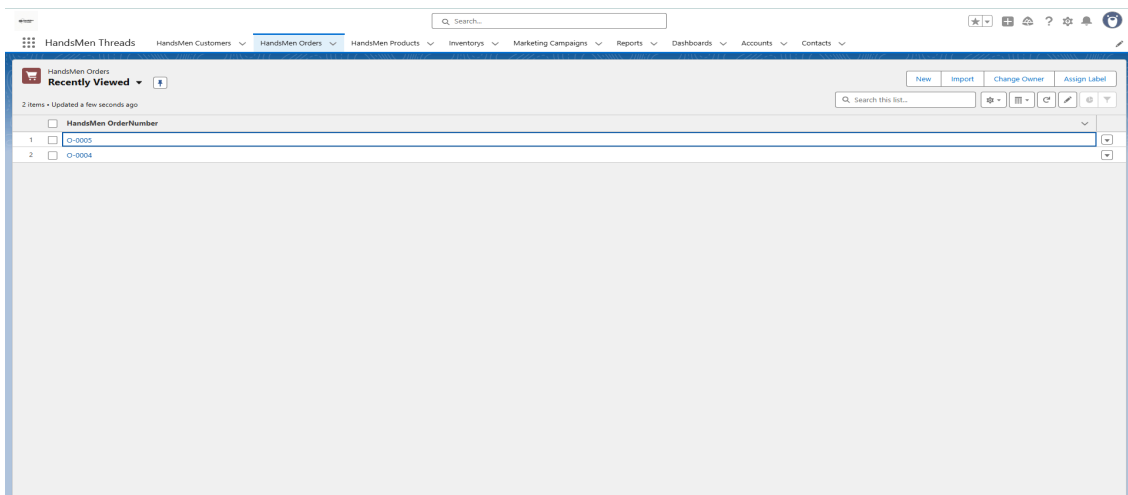
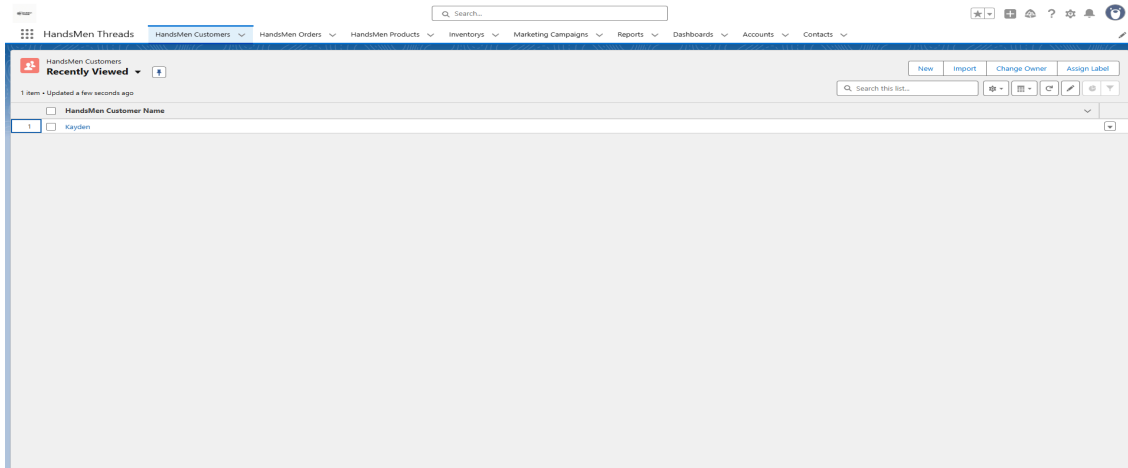
Phase 8: Data Management & Deployment

Data Import

- **What was done:** Data for customers, products, and orders was entered into Salesforce using the custom objects created.
- **Why it matters:** Ensures all business information is stored in one place and is easy to manage.

Change Sets & Deployment

- **What was planned:** The project was developed in a Salesforce Developer Org, with the intention to use change sets or SFDX for future deployment to production.
- **Why it matters:** Allows for safe and controlled movement of customizations from development to production.



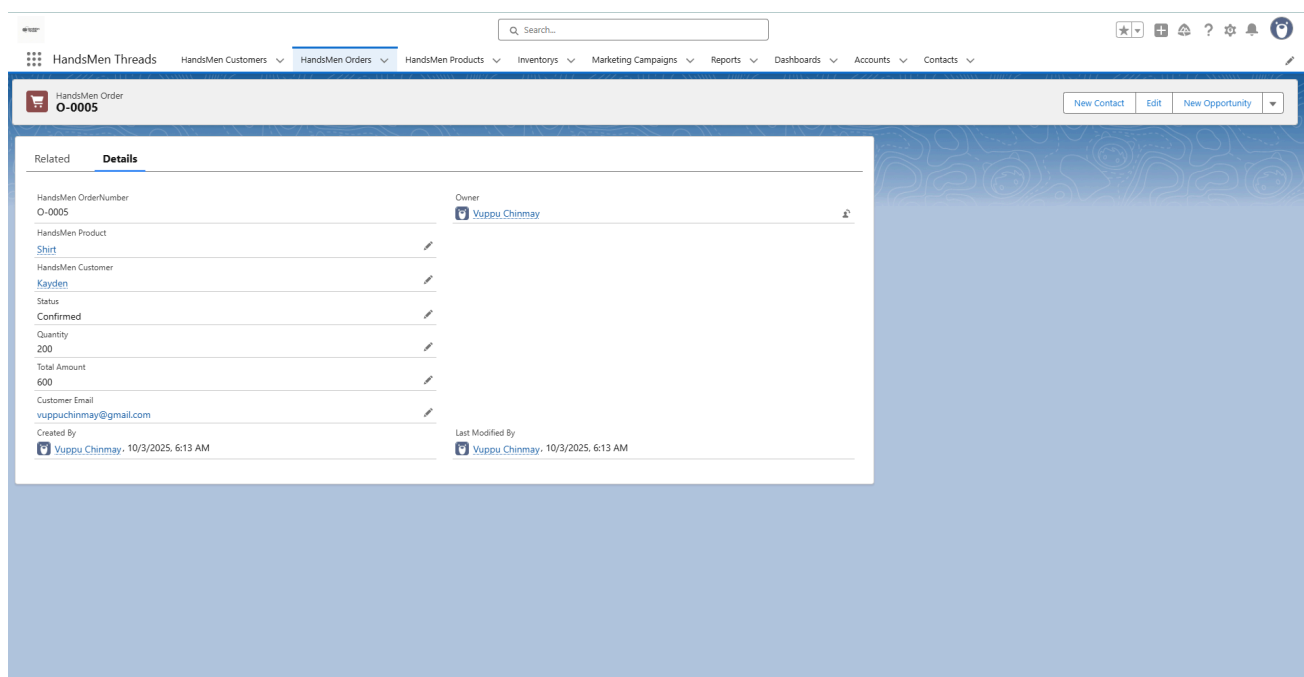
Phase 9: Reporting, Dashboards & Security Review

Reports & Dashboards

- **What was done:** Custom reports and dashboards were created to provide real-time insights into sales, inventory, and marketing performance.
- **Why it matters:** Helps teams track performance, spot trends, and make informed decisions.

Security Review

- **What was done:** Profiles and roles were set up to control who can see and do what in the system.
- **Why it matters:** Protects sensitive data and ensures users only have access to what they need.



HandsMen ThreadsHandsMen CustomersHandsMen OrdersHandsMen ProductsInventorysMarketing CampaignsReportsDashboardsAccountsContacts

Search...

HandsMen ProductsRecently Viewed1 item • Updated a few seconds ago

HandsMen Product Name

1Short

HandsMen ThreadsHandsMen CustomersHandsMen OrdersHandsMen ProductsInventorysMarketing CampaignsReportsDashboardsAccountsContacts

Search...

InventorysRecently Viewed1 item • Updated a few seconds ago

Inventory Number

1I-0001

SetupHomeObject Manager

Search Setup

profile

UsersProfiles

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

SETUPProfiles

Profiles

All ProfilesEditDeleteCreate New View

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Del ...	B2B_Reciprocity_Portal_Buyer_Profile	External Apps Login	✓
<input type="checkbox"/> Edit Del ...	Salesforce_API_Only_System_Integrations	Salesforce Integration	✓
<input type="checkbox"/> Edit Del ...	Read_Only	Salesforce	✓
<input type="checkbox"/> Edit Del ...	Custom_Sales_Profile	Salesforce	✓
<input type="checkbox"/> Edit Del ...	Custom_Marketing_Profile	Salesforce	✓
<input type="checkbox"/> Edit Del ...	Custom_Support_Profile	Salesforce	✓
<input type="checkbox"/> Edit Del ...	Platform_1	Salesforce	✓

Phase 10: Final Presentation & Demo Day

The Challenge

HandsMen Threads, a premium men's fashion brand, struggled with:

- Fragmented customer management
- Inefficient order processing
- Inventory mismanagement
- Limited marketing scalability

The need: A unified CRM to automate workflows, maintain data integrity, and enable real-time insights across sales, inventory, and marketing.

Our Salesforce Solution

Implemented a customized Salesforce CRM tailored to retail fashion's high-volume demands.

Key Highlights

1. Org Setup & Access Control

- Custom roles, profiles, and permission sets for Sales, Inventory, and Marketing teams.

2. Data Modeling & Relationships

- Custom Objects:
 - HandsMen_Customer__c – loyalty & profiles
 - HandsMen_Product__c – catalog & stock
 - HandsMen_Order__c – order tracking
 - Marketing_Campaign__c & Inventory__c

3. Automation with Flows

- Order confirmation emails
- Auto stock updates
- Daily loyalty status updates

4. Apex Triggers for Advanced Logic

- Order Total Trigger: auto-calculates totals
- Stock Deduction Trigger: ensures real-time stock accuracy
- Loyalty Trigger: upgrades status instantly

5. Unified User Experience

- Custom Lightning App with record pages & tabs for easy navigation.

6. Reporting & Dashboards

- Real-time analytics for sales, inventory, and marketing.

Business Impact

- Efficiency Gains: Reduced manual effort in order and inventory management.
- Customer Delight: Instant loyalty updates & automated engagement.
- Data Accuracy: Validation rules + Apex prevent errors.
- Scalability: Foundation ready for integrations & advanced analytics.

Future Roadmap

- Customer Portal: Self-service for orders, loyalty, and support.
- Mobile App: In-store sales & inventory on the go.
- AI-Powered Recommendations (Einstein): Personalized upselling.
- Messaging Integration: Real-time WhatsApp/SMS notifications.

Why It Matters

This project shows how Salesforce can transform retail operations—bridging customer experience, operational efficiency, and business growth into one platform.

HandsMen Threads now has a 360° view of its business, powered by Salesforce.

[**Demo Link**](#)

Conclusion

Our Salesforce CRM for HandsMen Threads is a game-changer. It smoothly handles our core business operations, builds stronger customer relationships, and keeps our data incredibly accurate across sales, inventory, and marketing. By harnessing Salesforce's powerful features – from custom objects and smart automations (flows) to strict data checks (validation rules), timely alerts, and custom code (Apex) – we've created an integrated platform. This gives HandsMen Threads instant insights, helps us make smarter decisions, and builds a solid foundation for growth and even more amazing customer experiences down the road.

Future Scope

We're not stopping here! Here are some exciting ways we can make the HandsMen Threads CRM even better:

- **Customer Portal:** Imagine a dedicated online portal where customers can log in, view their past orders, track their loyalty points, update their details, and even get support – all on their own!
- **Mobile App Development:** We can build a slick mobile app for our in-store teams using the Salesforce Mobile SDK. This would let them manage inventory, process orders, and access customer info right from their phones or tablets.
- **Advanced Reports & Dashboards:** Let's create some jaw-dropping sales and inventory dashboards in Salesforce! These visual tools would give us deeper insights into our performance, help us spot trends, and guide our strategic decisions.
- **AI-Powered Recommendations (Salesforce Einstein):** We could integrate Salesforce Einstein to offer personalized product recommendations to customers. Think about it: suggestions based on their past purchases or what similar customers love – a real sales booster!
- **Messaging Integration:** Connecting with popular messaging apps like WhatsApp or SMS would let us send real-time order confirmations, shipping updates, loyalty program news, and even personalized marketing messages directly to our customers' phones.