

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

Project Overview

HandsMen Threads, a high-end men's fashion brand, seeks to utilize Salesforce to improve operational efficiency, elevate customer experiences, and optimize inventory control. The project centers on deploying Salesforce CRM to handle customer orders, monitor stock levels, automate marketing activities, and deliver smooth, responsive customer support.

Objectives

HandsMen Threads, a dynamic organization in the fashion industry, is embarking on a Salesforce project designed to revolutionize their data management and enhance customer relations.

The project involves building a robust data model tailored to store all pertinent business data, ensuring a seamless flow of information across the organization.

A key aspect of this project is the maintenance of data integrity directly from the user interface (UI). This feature will safeguard the accuracy and consistency of the data, which is crucial for informed decision-making and reliable business operations. The project will integrate several new processes into the business workflow to improve customer service and operational efficiency:

- **Automated Order Confirmations:** Post-order confirmation, customers will receive an email update, fostering engagement and strengthening customer relations.
- **Dynamic Loyalty Program:** Customer loyalty statuses will be updated based on purchase history, enabling personalized rewards and promoting repeat business.
- **Proactive Stock Alerts:** When stock levels drop below five units, automatic emails will notify the warehouse team, ensuring timely restocking and preventing stockouts.
- **Scheduled Bulk Order Updates:** Daily midnight, the system will process bulk orders, updating financial records and adjusting inventory, ensuring accurate stock levels for daily operations.

Phase 1:

Requirement Analysis & Planning

Use Case :

Developing a premium fashion platform to streamline men's bespoke tailoring and enhance customer experience through personalized styling and seamless order management.

Instructions:

1. Salesforce CRM Implementation
2. Process Automation & Workflows
3. Apex & Trigger Implementations
4. Batch Jobs & Scheduled Processes
5. Data Security & Access Control

Phase 2:

Salesforce Development - Backend & Configurations

Setup environment & DevOps workflow:

1. Creating Developer Account
2. Creating a developer org in salesforce.
3. Account Activation

App, Object and field creation:

1. The following are the Custom objects which we created
 - HandsMen Customer
 - HandsMen Order
 - HandsMen Product
 - Inventory
 - Marketing Campaign
2. Data Management Tabs Creation for each object
3. Creation in Salesforce Platform

4. The following are the fields that we created in objects:

i) HandsMen Customer:

- First Name
- Last Name
- Email (Email),
- Phone (Phone),
- Loyalty Status (Picklist: Bronze, Gold, Silver)
- Total Purchases (Number)

ii) HandsMen Product:

- Name (Record Name),
- SKU (Text),
- Price (Currency),
- Stock_Quantity__c (Number)

iii) HandsMen Order:

- Order_Number (Record Name),
- Status (Picklist: Pending, Confirmed, Rejection),
- Quantity__c (Number),
- Total_Amount__c(Number)

iv) Inventory:

- Auto Number (Record Name),
- Warehouse (Text),
- Stock_Quantity__c (Number)

v) Marketing Campaigns:

- Campaign_Name (Record Name),
- Start_Date (Date),
- End_Date (Date)

5. Formula Fields:

- FullName (HandsMen Customer)

Formula : FirstName & " " & LastName

- Stock Status (Inventory)

Formula : IF(Stock_Quantity__c > 10, "Available", "Low Stock")

6. Lookup Relations:

- ✓ Marketing Campaign and HandsMen Customer
- ✓ HandsMen Product and HandsMen Order
- ✓ HandsMen Order and HandsMen Customer

7. Master-Detail Relationship:

- ❖ Inventory and HandsMen Product

Validation Rules :

S no.	Object	Field	Validation Rule
1.	HandsMen Order	Total Amount	Total_Amount__c <= 0
2.	Inventory	Stock Quantity	Stock_Quantity__c <= 0
3.	HandsMen Customer	Email	NOT CONTAINS(Email, "@gmail.com")

Flows :

Sno.	Flow Name	Type	Trigger Condition
1.	Order Confirmation Email	Record-Triggered	Trigger: When a record is updated Condition: Order__c.Status__c = "Confirmed"
2.	Stock Alert Email	Record-Triggered	Trigger: When a record is created or updated Condition: Stock_Quantity__c < 5
3.	Loyalty Status Update	Schedule-Triggered Flow	Trigger: Runs Daily Condition : to update Loyalty_Status__c

Phase 3:

UI/UX Development & Customization

1.Data Security Profiles Creation :




- “Platform 1”

2.Data Security Roles Creation :

- Sales
- Marketing
- Inventory

3.Data Security User Creation :

Users for the three security roles

-  Sales : Niklaus Mikaelson
-  Marketing : John Doe
-  Inventory : Kol Mikaelson

4.Email Template:

Creating the following email templates:

Template Name	Type	Trigger
Order Confirmation	HTML	Sent when Order is placed
Low Stock Alert	Text	Sent when Inventory__c.Stock_Quantity__c < 5
Loyalty Program Email	HTML	Sent when customer qualifies for loyalty rewards

Order Confirmation Email Template:-

*Dear {!HandsMen_Order__c.HandsMen_Customer__c},
 Your order # {!HandsMen_Order__c.Name} has been confirmed!
 Thank you for shopping with us.
 Best Regards,
 Sales Team*

Low Stock Alert Email Template:-

Dear Inventory Manager,

This is to inform you that the stock for the following product is running low:

Product Name: {!Inventory__c.HandsMen_Product__c}

Current Stock Quantity: {!Inventory__c.Stock_Quantity__c}

Please take the necessary steps to restock this item immediately.

Best Regards,

Inventory Monitoring System

Loyalty Points Email Template:-

Congratulations! You are now a {!HandsMen_Customer__c.Loyalty_Status__c} 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.

Phase 4:

Data Migration, Testing & Security

Data Security - Permission Set :

S no.	Role	Access Level
1.	Sales Manager	Full Access to Customers, Orders
2.	Inventory Manager	Read & Edit on Inventory, Products
3.	Marketing Team	Read on Customers, Edit on Marketing Campaigns

Automation using Apex

Apex Triggers

Trigger Name	Object	Purpose
Update Order Total	Order__c	Auto-update Total_Amount__c on order save
Stock Deduction	Inventory__c	Reduce stock when an order is placed

Loyalty Status Update	Customer__c	Upgrade loyalty status based on purchases
------------------------------	-------------	---

Update Order Total :-

trigger OrderTotalTrigger on HandsMen_Order__c (before insert, before update) {

Set<Id> productIds = new Set<Id>();

for (HandsMen_Order__c order : Trigger.new) {

if (order.HandsMen_Product__c != null) {

productIds.add(order.HandsMen_Product__c);

}

}

Map<Id, HandsMen_Product__c> productMap = new Map<Id, HandsMen_Product__c>(

[SELECT Id, Price__c FROM HandsMen_Product__c WHERE Id IN :productIds]

);

for (HandsMen_Order__c order : Trigger.new) {

*if (order.HandsMen_Product__c != null &&
productMap.containsKey(order.HandsMen_Product__c)) {*

HandsMen_Product__c product = productMap.get(order.HandsMen_Product__c);

if (order.Quantity__c != null) {

*order.Total_Amount__c = order.Quantity__c * product.Price__c;*

}

}

}

}

Stock Deduction Trigger:-

trigger StockDeductionTrigger on HandsMen_Order__c (after insert, after update) {

```
Set<Id> productIds = new Set<Id>();
```

```
for (HandsMen_Order__c order : Trigger.new) {  
    if (order.Status__c == 'Confirmed' && order.HandsMen_Product__c != null) {  
        productIds.add(order.HandsMen_Product__c);  
    }  
}  
  
if (productIds.isEmpty()) return;  
  
// Query related inventories based on product  
Map<Id, Inventory__c> inventoryMap = new Map<Id, Inventory__c>(  
    [SELECT Id, Stock_Quantity__c, HandsMen_Product__c  
    FROM Inventory__c  
    WHERE HandsMen_Product__c IN :productIds]  
);
```

```
List<Inventory__c> inventoriesToUpdate = new List<Inventory__c>();
```

```
for (HandsMen_Order__c order : Trigger.new) {  
    if (order.Status__c == 'Confirmed' && order.HandsMen_Product__c != null) {  
        for (Inventory__c inv : inventoryMap.values()) {  
            if (inv.HandsMen_Product__c == order.HandsMen_Product__c) {  
                inv.Stock_Quantity__c -= order.Quantity__c;  
                inventoriesToUpdate.add(inv);  
                break;  
            }  
        }  
    }  
}
```



```

    if (!inventoriesToUpdate.isEmpty()) {
        update inventoriesToUpdate;
    }
}

```

Batch Jobs:

Description

Batch Job	Purpose	Schedule
Loyalty Points Calculation	Updates customer points weekly	Every Wednesday 12 AM
Inventory Sync	Syncs stock levels with external warehouse system	Daily at 2 AM

Source Code:

```

global class InventoryBatchJob implements Database.Batchable<SObject>, Schedulable {
    global Database.QueryLocator start(Database.BatchableContext BC) {
        return Database.getQueryLocator(
            'SELECT Id, Stock_Quantity__c FROM Product__c WHERE Stock_Quantity__c < 10'
        );
    }

    global void execute(Database.BatchableContext BC, List<SObject> records) {
        List<HandsMen_Product__c> productsToUpdate = new List<HandsMen_Product__c>();
        // Cast SObject list to Product__c list
        for (SObject record : records) {
            HandsMen_Product__c product = (HandsMen_Product__c) record;
            product.Stock_Quantity__c += 50; // Restock logic
        }
    }
}

```

```

productsToUpdate.add(product);
}
if (!productsToUpdate.isEmpty()) {
try {
update productsToUpdate;
} catch (DmlException e) {
System.debug('Error updating inventory: ' + e.getMessage());
}
}
}

global void finish(Database.BatchableContext BC) {
System.debug('Inventory Sync Completed');
}

// Scheduler Method

global void execute(SchedulableContext SC) {
InventoryBatchJob batchJob = new InventoryBatchJob();
Database.executeBatch(batchJob, 200);
}
}

```

Execute anonymous window code:-


```
System.schedule('Daily Inventory Sync', '0 0 0 * * ?', new InventoryBatchJob());
```

Phase 5:

Deployment, Documentation & Maintenance


The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar and a list of setup items. The 'Users' item is selected, and its sub-items are visible. The main content area shows the 'Users' section with a table of users. The table has columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table contains 8 rows of user data. At the bottom of the table, there are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'.


Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Bobbi_Danyil	dar	danyil.bobbi.danyil100@apenforce.com		✓	System Administrator
Edit	Chatter_Expert	Chatter	chatty009y500000y0cymeaw.mymn62tdv@chatter.salesforce.com		✓	Chatter Free User
Edit	doe_john	jdoe	danyil.bobbi.danyil123123@gmail.com	Marketing	✓	Platform 1
Edit	EPIC_OrgFarm	CEPIC	epic.fbcbbaae9e28@orgfarm.salesforce.com		✓	System Administrator
Edit	Mikeatson_Kol	kmika	danyil.bobbi.danyil1234@gmail.com	Inventory	□	Platform 1
Edit	Mikeatson_Niklaus	nmika	danyil.bobbi.danyil123@gmail.com	Sales	✓	Platform 1
Edit	User_Integration	integ	integration009y500000y0cymeaw.com		✓	Analytics Cloud Integration User
Edit	User_Security	sec	insightssecurity009y500000y0cymeaw.com		✓	Analytics Cloud Security User



HandsMen Threads

[HandsMen Customers](#)
[HandsMen Orders](#)
[HandsMen Products](#)
[Inventories](#)
[Marketing Campaigns](#)
[Reports](#)
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HandsMen Product
shirt

[New Contact](#)
[Edit](#)
[New Opportunity](#)

[Related](#)
[Details](#)

HandsMen Product Name	shirt	Owner	Danyli Bobis
SKU	0003		
Price	\$2		
Stock Quantity	1,000		
Created By	Danyli Bobis - 10/22/2023, 7:54 PM	Last Modified By	Danyli Bobis - 10/22/2023, 7:55 PM

Q Search...

HandMen Threads

HandMen Customers

HandMen Orders

HandMen Products

Inventories

Marketing Campaigns

Reports

Dashboards

Accounts

Contacts

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

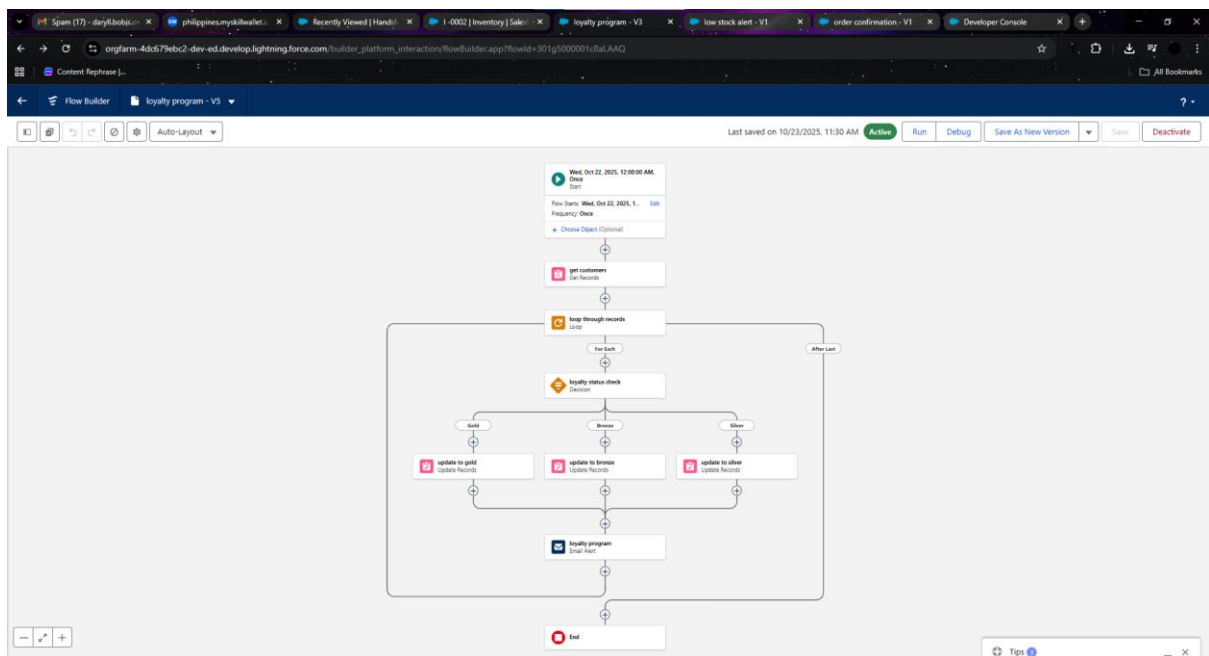
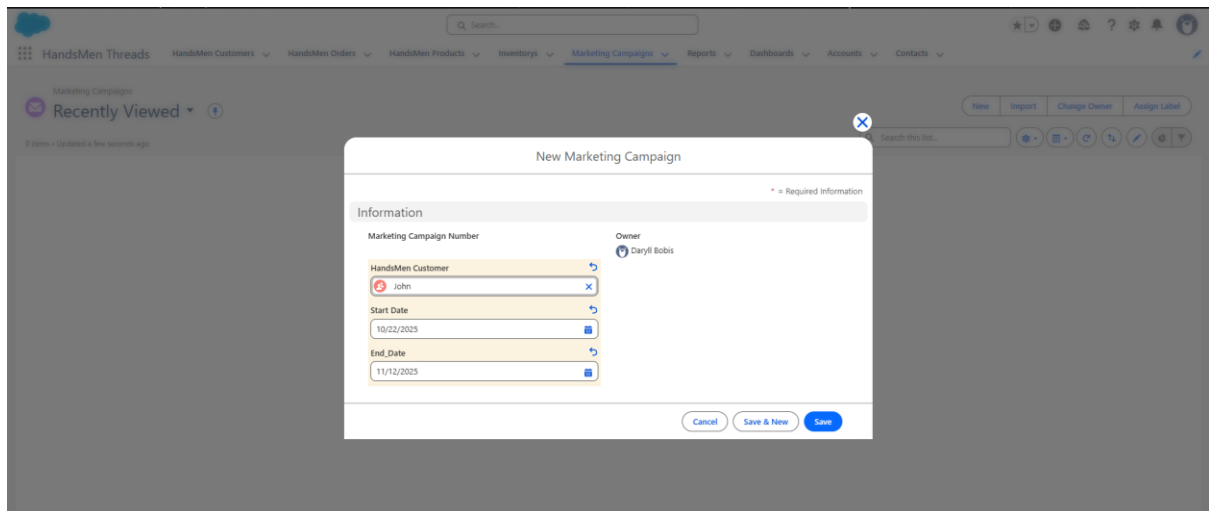
query

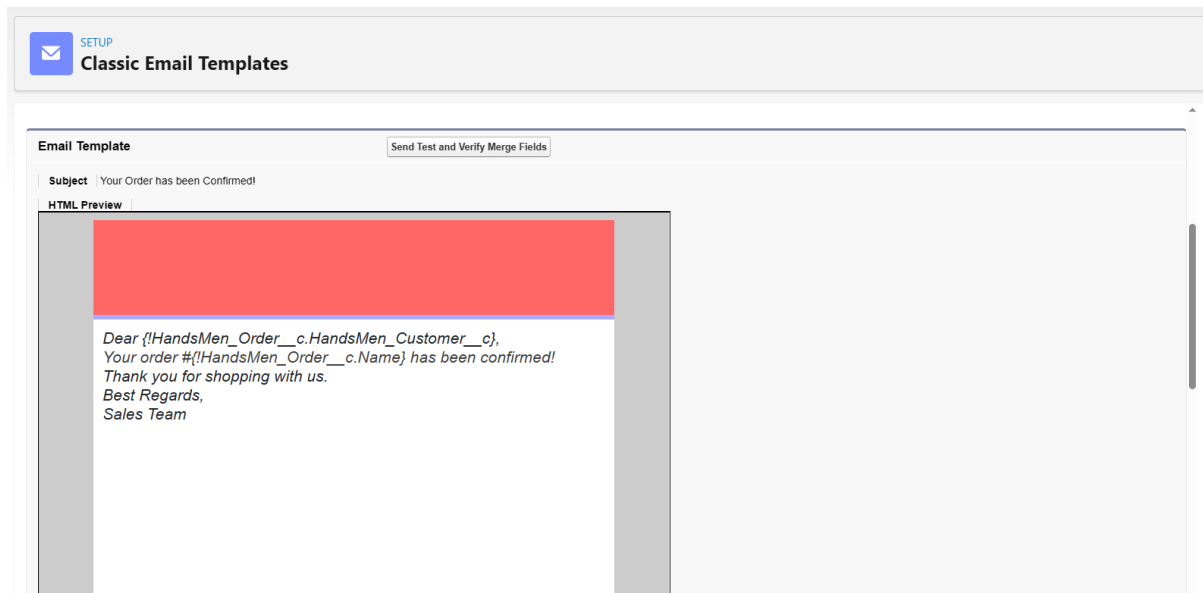
Created By

Darryll Bobis, 10/22/2025, 7:56 PM

Last Modified By

Darryll Bobis, 10/22/2025, 8:06 PM





Conclusion

HandsMen Threads, a premium men's fashion brand, aims to leverage Salesforce to streamline operations, enhance customer experience, and optimize inventory management. This project focuses on implementing Salesforce CRM to manage customer orders, track inventory, automate marketing campaigns, and provide seamless customer service.

The project involves building a robust data model tailored to store all pertinent business data, ensuring a seamless flow of information across the organization.

A key aspect of this project is the maintenance of data integrity directly from the user interface (UI). This feature will safeguard the accuracy and consistency of the data, which is crucial for informed decision-making and reliable business operations. The project will integrate several new processes into the business workflow to improve customer service and operational efficiency.