

Salesforce Project Documentation for **HandsMen Threads: Elevating the Art of Sophistication in Men's Fashion**



Project Overview

HandsMen Threads is a premium men's fashion brand specializing in bespoke tailoring and personalized styling. The goal of this Salesforce CRM project is to centralize customer, order, product, and inventory data while improving customer experience through automation and structured workflow processes. The CRM enhances the company's ability to manage customer relationships, track stock efficiently, automate communications, and ensure data integrity across teams.

Objectives

The primary objective of this CRM implementation is to streamline the end-to-end operational workflow of HandsMen Threads. This includes improving customer data accuracy, automating order confirmations, tracking loyalty programs, managing inventory levels, and enhancing reporting capabilities. Through Salesforce, the business aims to increase customer satisfaction, reduce operational workload, and ensure that real-time business insights guide decision-making.

Phase 1: Requirement Analysis & Planning

A. Understanding Business Requirements

The following user needs were identified:

- Manage customer information with accurate contact details and loyalty status tracking.

- Manage product offerings and maintain stock visibility.
- Automate order confirmation and related customer notifications like email alerts.
- Notify the warehouse team when inventory reaches critical levels.
- Process bulk orders daily at midnight to update financial and inventory records.
- Maintain secure access for Sales users with proper permission control.

B. Defining Project Scope and Objectives

The scope includes:

- Creating five custom objects for data storage.
- Automating business processes using Flows and Apex.
- Implementing validation rules to ensure data accuracy.
- Developing reports and dashboards for management insights.
- Configuring security via profiles, permission sets, and roles.
- Implementing nightly batch processes.

Out of scope:

- Integration with external systems
- Custom storefront or e-commerce extensions

C. Data Model and Security Model Design

- Entity Relationship Diagram (ERD)

D. Stakeholder Mapping

Stakeholder	Role	Responsibilities
Project Sponsor	Executive	Approves overall CRM vision
Sales Team	End Users	Manages customers, orders
Warehouse Manager	Ops	Receives low stock alerts
Salesforce Admin	Builder	Designs, builds and configures the CRM

E. Execution Roadmap (*as instructed in SkillWallet Capstone details*)

Phase 1: Architecture & Planning

- Define objects, fields, relationships, formula fields.
- Establish validation rules, flows, Apex triggers, batch jobs.

- Design email templates for notifications and customer communication.

Phase 2: Development

- Object and field creation.
- Implement automation (flows, process builders, Apex triggers).
- Set up data security and sharing rules.
- Develop batch jobs for scheduled processing.
- Configure email templates and notifications.

Phase 3: Testing & QA

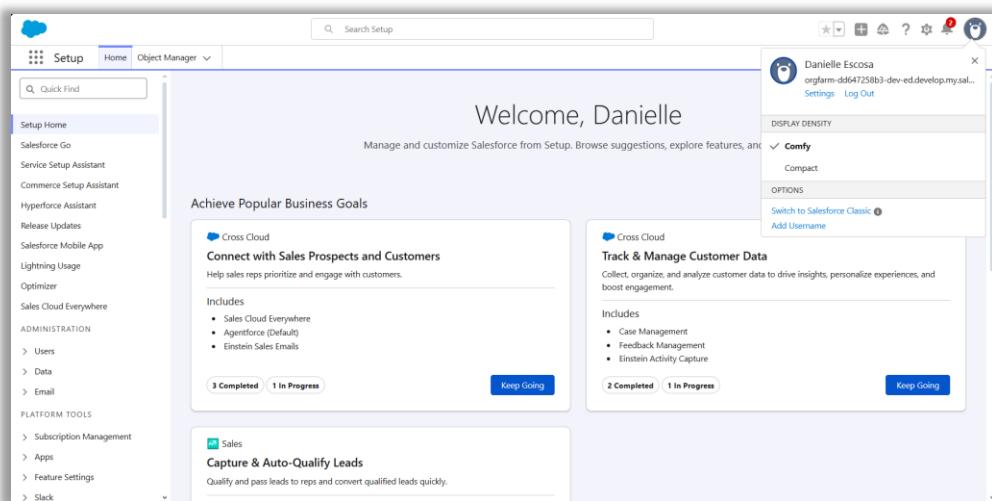
- Unit testing of objects and automation.
- End-to-end testing with sample data.
- Performance testing and security checks.

Phase 4: Deployment & Training

- Deploy to production.
- Train users on new functionality.
- Post-go-live support and monitoring

Phase 2: Salesforce Development – Backend & Configurations

A. Environment Setup & DevOps



B. Customization of Objects and Fields

Custom objects created:

- **HandsMen Customer** – Stores customer information and profiles for tracking interactions and orders.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD
Created By	CreatedById	Lookup(User)	
Email	Email__c	Email	
FirstName	FirstName__c	Text(50)	
FullName	FullName__c	Formula (Text)	
HandsMen Customer Name	Name	Text(50)	
Last Modified By	LastModifiedById	Lookup(User)	
LastName	LastName__c	Text(50)	
Loyalty Status	Loyalty_Status__c	Picklist	
Owner	OwnerId	Lookup(User/Group)	
Phone	Phone__c	Phone	
Total Purchases	Total_Purchases__c	Number(18, 0)	

- **HandsMen Product** – Contains details of items sold by HandsMen Threads.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
HandsMen Product Name	Name	Text(50)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		✓
Price	Price__c	Currency(18, 0)		
SKU	SKU__c	Text(50)		
Stock Quantity	Stock_Quantity__c	Number(18, 0)		

- **HandsMen Order** – Records customer purchases and order statuses.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Customer Email	Customer_Email__c	Email		
HandsMen Customer	HandsMen_Customer__c	Lookup(HandsMen Customer)		✓
HandsMen OrderNumber	Name	Auto Number		✓
HandsMen Product	HandsMen_Product__c	Lookup(HandsMen Product)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		✓
Quantity	Quantity__c	Number(18, 0)		
Status	Status__c	Picklist		
Total Amount	Total_Amount__c	Number(18, 0)		

- **Inventory** – Monitors product stock levels and availability.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
HandsMen Product	HandsMen_Product__c	Master-Detail(HandsMen Product)		
Inventory Number	Name	Auto Number		
Last Modified By	LastModifiedById	Lookup(User)		
Stock Quantity	Stock_Quantity__c	Number(18, 0)		
Stock Status	Stock_Status__c	Formula (Text)		
Warehouse	Warehouse__c	Text(60)		

- **Marketing Campaign** – Tracks promotional activities and customer engagement efforts.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
End Date	End_Date__c	Date		
HandsMen Customer	HandsMen_Customer__c	Lookup(HandsMen Customer)		
Last Modified By	LastModifiedById	Lookup(User)		
Marketing Campaign Number	Name	Auto Number		
Owner	OwnerId	Lookup(User,Group)		
Start Date	Start_Date__c	Date		

C. Validation Rules

Examples:

- **Valid Email Format**

Object: HandsMen Customer__c

Field: Email

Validation Rule: NOT CONTAINS>Email, "@gmail.com"

The screenshot shows the Salesforce Setup interface under Object Manager for the HandsMen Customer object. The validation rule is titled "HandsMen Customer Validation Rule". The validation rule detail table includes:

Field	Value
Rule Name	Email
Error Condition Formula	NOT CONTAINS(Email__c , "@gmail.com")
Error Message	Please fill Correct Gmail
Description	
Created By	Danielle Escosa, 11/22/2025, 12:53 PM
Modified By	Danielle Escosa, 11/22/2025, 12:53 PM

The URL in the browser bar is: <https://orgfarm-d0f47258b3-dev-ed.develop.my.salesforce.com/one/one.app#/setup/ObjectManager/01gK000003Jz65/MySearch/Layouts/view>

- **Stock cannot be negative**

Object: Inventory__c

Field: Stock_Quantity__c

Validation Rule: Stock_Quantity__c <= 0

The screenshot shows the Salesforce Setup interface under Object Manager for the Inventory object. The validation rule is titled "Inventory Validation Rule". The validation rule detail table includes:

Field	Value
Rule Name	Stock_Quantity
Error Condition Formula	Stock_Quantity__c <= 0
Error Message	The inventory count is never less than zero.
Description	
Created By	Danielle Escosa, 11/22/2025, 12:50 PM
Modified By	Danielle Escosa, 11/22/2025, 12:50 PM

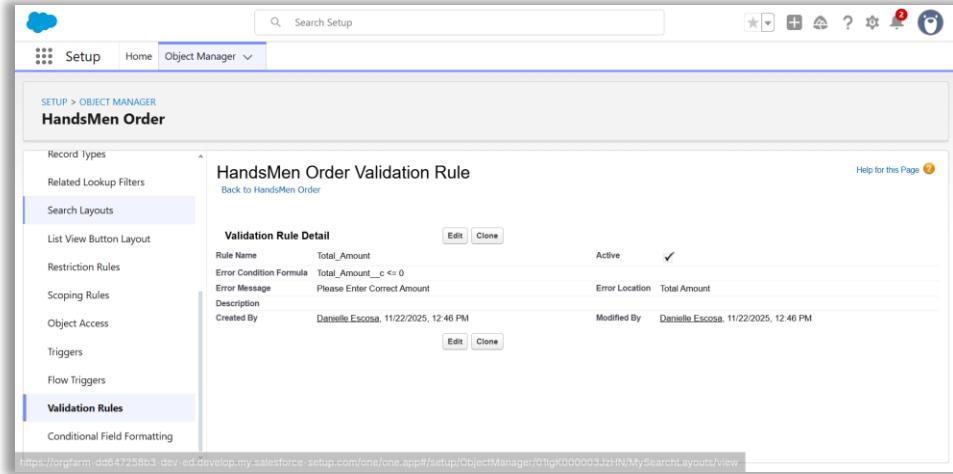
The URL in the browser bar is: <https://orgfarm-d0f47258b3-dev-ed.develop.my.salesforce.com/one/one.app#/setup/ObjectManager/01gK000003Jz65/MySearch/Layouts/view>

- **Correct Order Amount**

Object: HandsMen Order__c

Field: Total_Amount__c

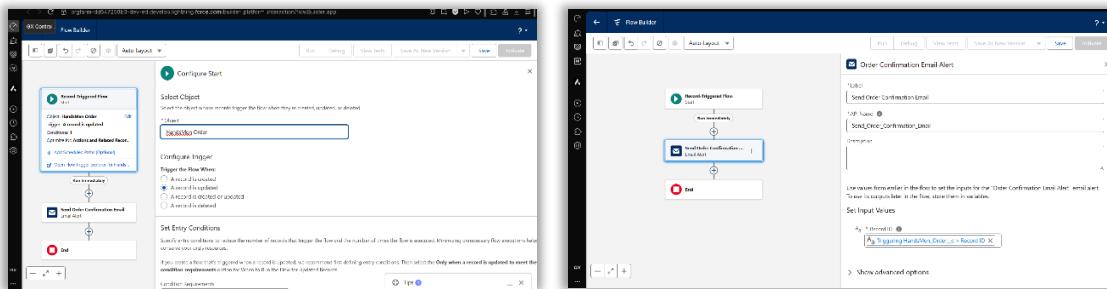
Validation Rule: Total_Amount__c <= 0



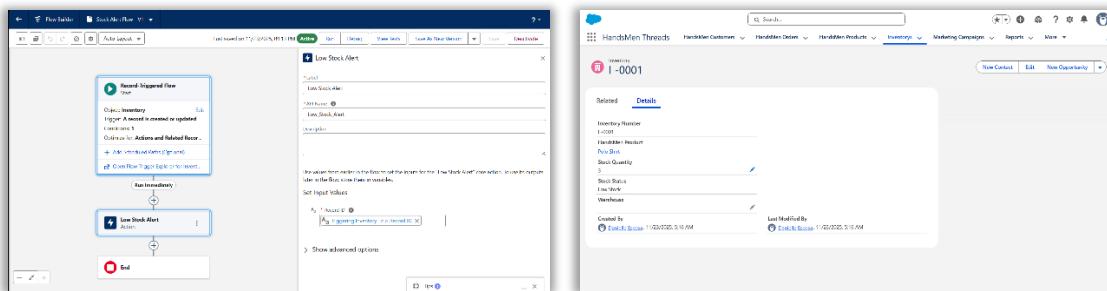
D. Automation (Flows, Workflow Rules, Approval Process)

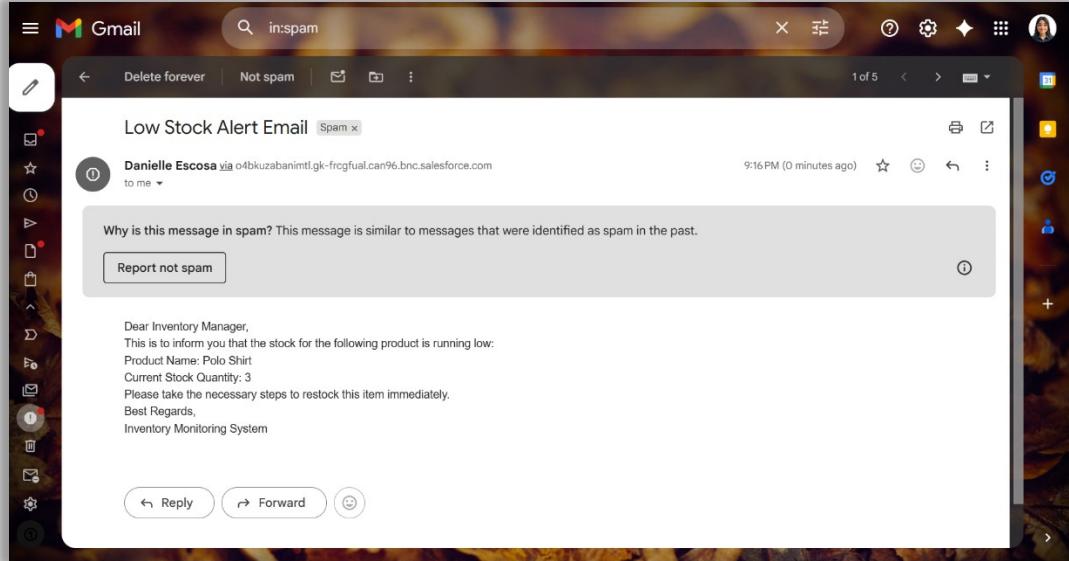
Flows Implemented

1. Order Confirmation Flow – Sends email when order is confirmed

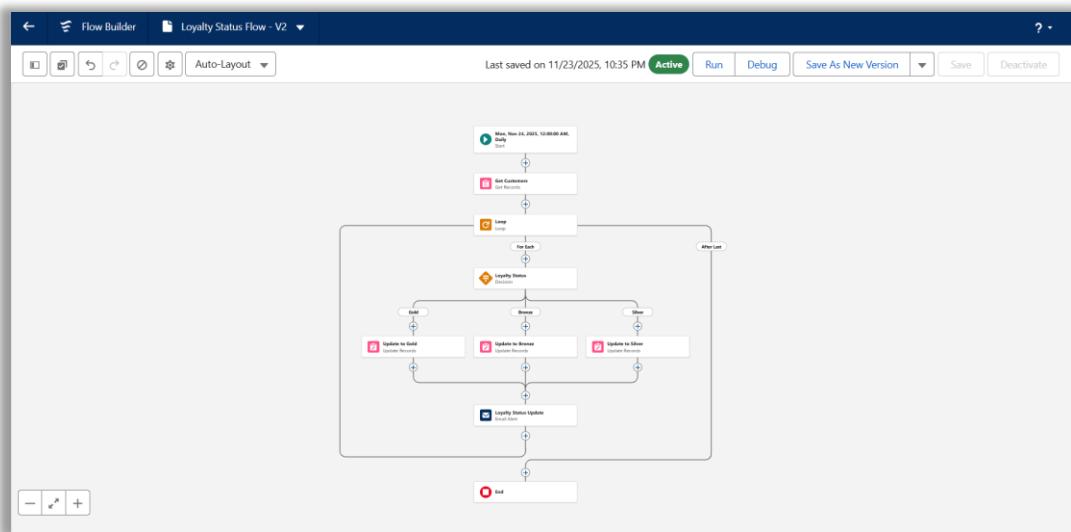


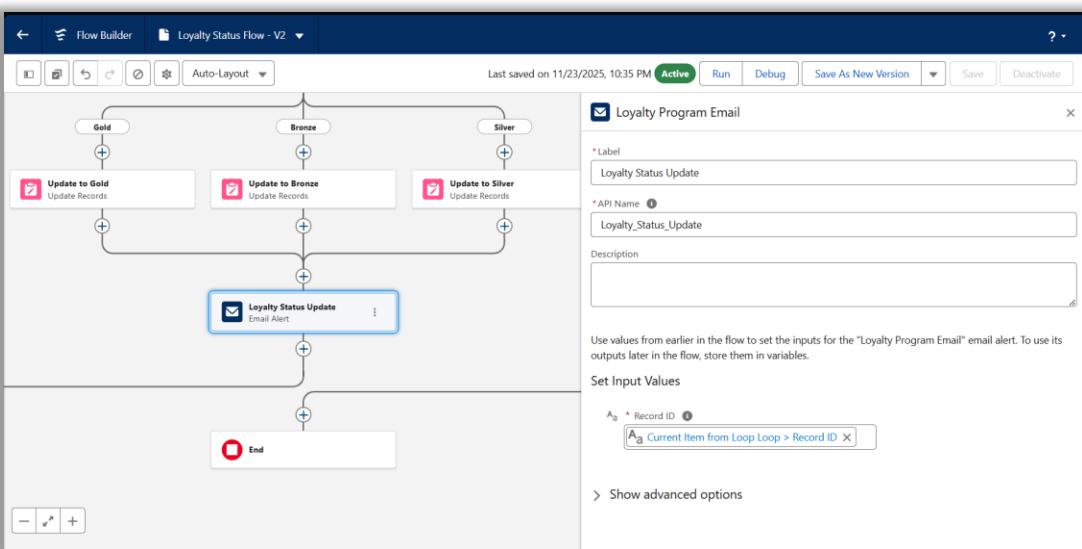
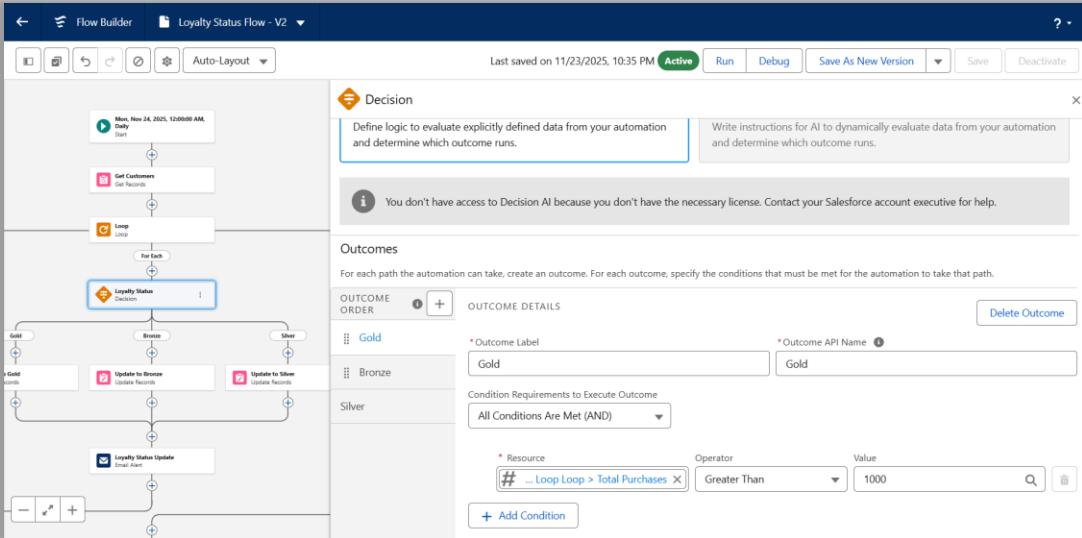
2. Stock Alert Flow – Triggers email when stock < 5





3. Loyalty Status Update (Scheduled Flow) – Runs at midnight





Phase 3: UI/UX Development & Customization

A. Lightning App Setup

App Name: HandsMen Threads - Includes navigation items for customers, orders, inventory, products.

The top screenshot shows the Salesforce App Launcher in the Setup section. A search bar at the top contains the text "HandsMen Threads". Below the search bar, under the "Apps" section, there is a card for "HandsMen Threads". Under the "Items" section, it says "No results" and has a "View All" link.

The bottom screenshot shows the HandsMen Customers list view. The page title is "HandsMen Threads". The navigation bar includes links for HandsMen Customers, HandsMen Orders, HandsMen Products, Inventories, Marketing Campaigns, and More. The main content area displays a list of customers with 2 items sorted by HandsMen Customer Name. The list includes "Dani Escosa" and "John Smith". A sidebar on the right provides quick access to various Salesforce features.

B. Page Layouts & Dynamic Forms

Layouts customized to show relevant sections:

- **Customer Info** – shows customer information such as customer name, email, loyalty status, and total amount of purchases.

This screenshot shows the HandsMen Customer detail page for "John Smith". The page includes a header with the customer's name and a toolbar with "New Contact", "Edit", and "New Opportunity" buttons. The main content area is divided into sections: "Related" and "Details". The "Details" section contains fields for HandMen Customer Name (John Smith), Email (danielle.escosa@gmail.com), Phone, Loyalty Status (Silver), Firstname (John), Lastname (Smith), and Total Purchases (1,000). It also shows the owner (Danielle Escosa) and the last modified date (11/26/2025, 6:01 AM).

- **Loyalty Summary** – shows user's loyalty status whether they are upgraded to Bronze, Silver, or Gold depending on their total amount of purchases.

Customer Details:

- HandsMen Customer Name: John Smith
- Email: danielleescosa@gmail.com
- Phone:
- Loyalty Status: Silver
- Firstname: John
- Lastname: Smith
- Fullname: John Smith
- Total Purchases: 1,000
- Created By: Danielle Escosa, 11/03/2025, 6:01 AM
- Last Modified By: Danielle Escosa, 11/04/2025, 12:00 AM

- **Order Items** – list of orders

HandsMen OrderNumber
1 O-0006
2 O-0001
3 O-0005
4 O-0002

Order Item Details:

- HandsMen OrderNumber: O-0006
- HandsMen Product: Polo Shirt
- HandsMen Customer: John Smith
- Status: Confirmed
- Quantity: 501
- Total Amount: 2,505
- Customer Email: jimith@gmail.com
- Created By: Danielle Escosa, 11/23/2025, 10:48 AM
- Last Modified By: Danielle Escosa, 11/23/2025, 10:48 AM

C. User Management

Users: Kol Mickaelson, Niklaus Mickaelson (I just added John and Dave Mickaelson)

The screenshot shows the Salesforce Setup page under the 'Users' section. It displays a list of users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The users listed are:

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chan:009g0000000f000!chatter.salesforce.com	Inventory	<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	Eric.Craigam	CEPIC	eric:fc6991c977d9@yahoohm.salesforce.com	Marketing	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	Escosa, Danielle	dan	danielle.escosa@77agenturra.com	Inventory	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	Mickaelson, Dave	dave	daniellemickaelson0@gmail.com	Sales	<input checked="" type="checkbox"/>	Platform_1
<input type="checkbox"/> Edit	Mickaelson, John	jmk	daniellemickaelson7@gmail.com	Marketing	<input checked="" type="checkbox"/>	Platform_1
<input type="checkbox"/> Edit	Mickaelson, Kol	kolka	daniellemickaelson12@gmail.com	Inventory	<input checked="" type="checkbox"/>	Platform_1
<input type="checkbox"/> Edit	Mickaelson, Niklaus	nmeika	daniellemickaelson12@gmail.com	Sales	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Integrator	integrator	integrator@00000000000000000000000000000000		<input checked="" type="checkbox"/>	Analytics Cloud Secure User
<input type="checkbox"/> Edit	User Security	sec	integratorsecurity@00000000000000000000000000000000			

D. Reports & Dashboards

Reports:

The screenshot shows the HandsMen Threads report interface titled 'New HandsMen Customers Report'. It displays a preview of customer data with fields: HandsMen Customer: ID, Loyalty Status, Total Purchases, and Email. The data shown is:

	HandsMen Customer: ID	Loyalty Status	Total Purchases	Email
1	a00gK00000TJmxu	Bronze	500	danielle.escosa@gmail.com
2	a00gK00000TJuKN	Silver	1,000	danielle.escosa@gmail.com
3			1,500	

Phase 4: Data Migration, Testing & Security

A. Security Model

Includes:

- **Profiles** – Shows Platform 1 profile

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup' (selected), 'Home', and 'Object Manager'. A search bar at the top right contains the text 'Search Setup'. Below the navigation, there's a sidebar with a search bar ('profile') and sections for 'Users' and 'Profiles'. The main content area is titled 'Profiles' and shows a single profile named 'Platform 1'. The profile details include its name, user license (Salesforce), and a checked 'Custom Profile' checkbox. It was created by Danielle Escosa on 11/22/2025, 1:18 PM, and modified by her on the same date at 1:21 PM. The 'Page Layouts' section lists 'Standard Object Layouts' for Global and Email Application, both set to 'Not Assigned'. The 'Location Group Assignment' section also lists 'Not Assigned'.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup' (selected), 'Home', 'Object Manager', and a search bar 'Search Setup'. On the left, a sidebar shows 'profile' in the search bar, a 'Users' section, and a 'Profiles' section which is currently selected. The main content area has a blue header 'SETUP' and 'Profiles'. Below it, a section titled 'Platform 1' contains the message: 'On this page you can create, view, and manage users.' It also says 'Didn't find what you're looking for? Try using Global Search.' and 'To get more licenses, use the Your Account app. Let's Go.' A 'Help for this Page' link is on the right. The main table lists user profiles:

Action	Full Name *	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Mikaelson, Dave	dmika	daniellee.escosa000@gmail.com	Inventory	<input type="checkbox"/>	Platform 1
<input type="checkbox"/>	Mikaelson, John	jmika	daniellee.escosa789@gmail.com	Marketing	<input type="checkbox"/>	Platform 1
<input type="checkbox"/>	Mikaelson, Kol	kmika	daniellee.escosa456@gmail.com	Inventory	<input checked="" type="checkbox"/>	Platform 1
<input type="checkbox"/>	Mikaelson, Niklaus	nmika	daniellee.escosa123@gmail.com	Sales	<input checked="" type="checkbox"/>	Platform 1

At the bottom of the table are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'. Navigation links at the very bottom include letters A through Z and an 'Other' link.

- **Roles & Role Hierarchy** – Inventory, Marketing, Sales under CEO

The screenshot shows the Microsoft Dynamics 365 Setup Roles page. At the top, there are navigation links for Setup, Home, and Object Manager. A search bar is located at the top right. The main content area has a header "SETUP Roles" with a user icon. Below the header, a section titled "Creating the Role Hierarchy" contains the sub-section "Your Organization's Role Hierarchy". It displays a tree structure of roles:

- College All Campus All**
 - President of the University of the Philippines Santa Maria Bulacan Campus**
 - Add Role
 - CEO** Edit | Del | Assign
 - CFO** Edit | Del | Assign
 - COO** Edit | Del | Assign
 - Inventory** Edit | Del | Assign
 - Marketing** Edit | Del | Assign
 - Sales** Edit | Del | Assign
 - SVP Customer Service & Support** Edit | Del | Assign
 - Add Role
 - SVP Human Resources** Edit | Del | Assign
 - SVP Sales & Marketing** Edit | Del | Assign

- **Permission Set: Permission_Platform_1** (I assigned it to a Platform 1 User: Niklaus Mickaelson)

Permission Sets

Object Permissions

Label	Object API Name	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields
HandsMen.Customer	HandsMen.Customer..	✓	✓	✓	✓	X	X	X

Current Assignments

Full Name	Active	Role	Profile	User License	Expires On
Niklaus Mickaelson	✓	Sales	Platform 1	Salesforce	

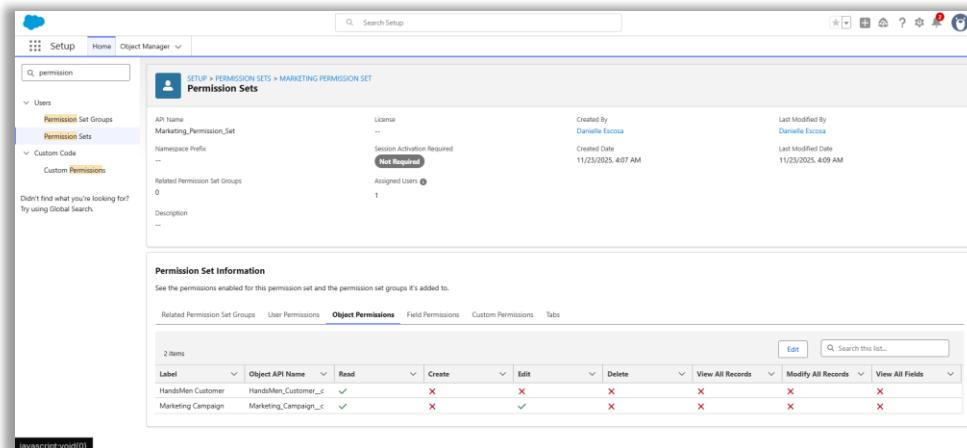
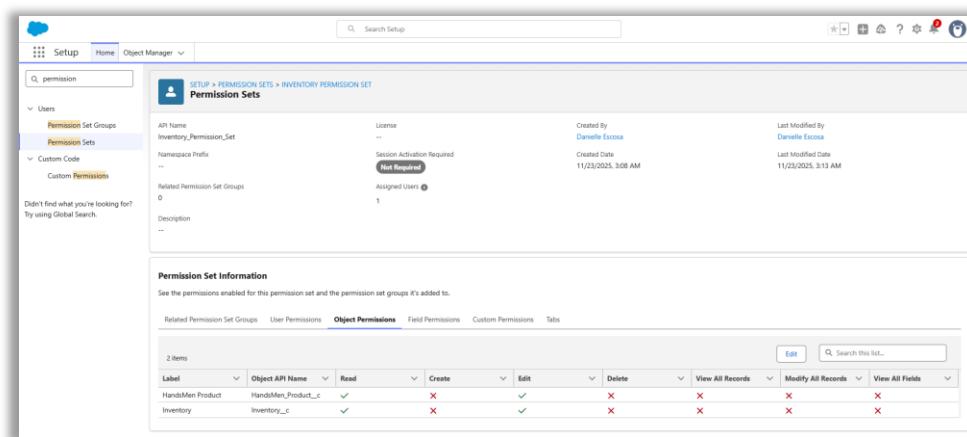
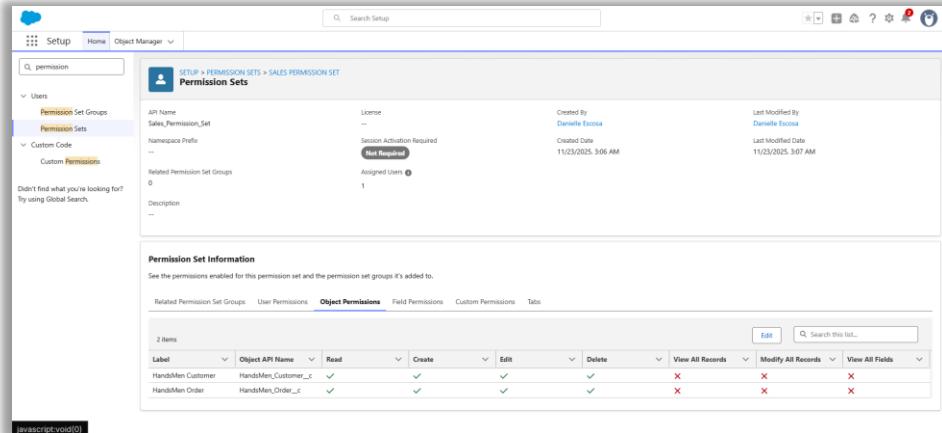
User Detail

Role

User License	Profile	Platform 1
Active	✓	
Marketing User		
Office User		
Flow User		
Service Cloud User		
Site.com Contributor User		
Site.com Publisher User		
Mobile Push Registrations	View	
Data.com User Type		
Accessibility Mode (Classic Only)		

Permission Set Assignments

Action	Permission Set Name	Date Assigned	Expires On
Del	Sales.Permission_Set	11/23/2025	



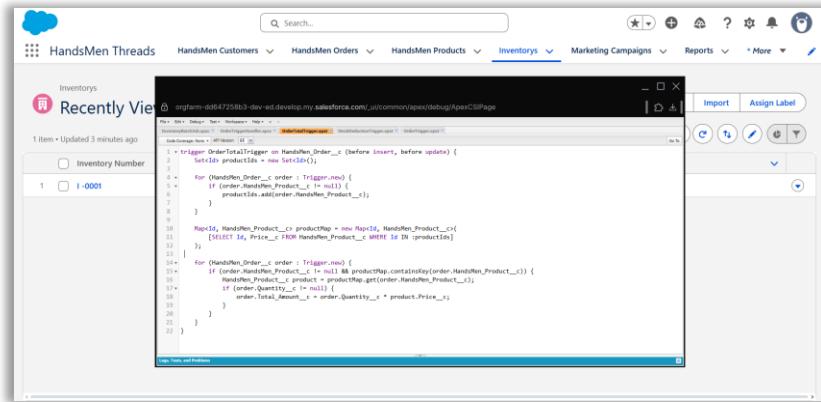
B. Test Classes

Test classes written for:

- **Apex Classes** – OrderTriggerHandler

- **Triggers** – OrderTotalTrigger, StockDeductionTrigger, OrderTrigger

1. OrderTotalTrigger - Auto-update Total_Amount_c on order save

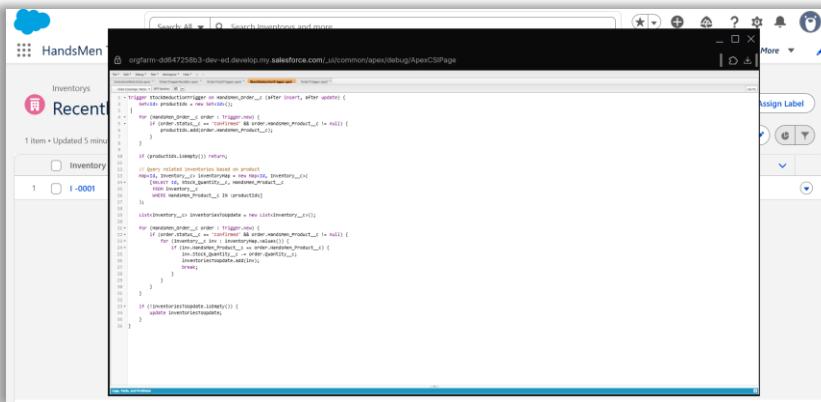


```

trigger OrderTotalTrigger on HandsMen_Order__c (before insert, before update) {
    Set<String> productIds = new Set<String>();
    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) {
            if (order.HandsMen_Product__c.product != productMap.get(order.HandsMen_Product__c)) {
                order.Total_Amount__c = null;
            } else if (order.Quantity__c != null) {
                order.Total_Amount__c = order.Quantity__c * product.Price__c;
            }
        }
    }
}

```

2. StockDeductionTrigger - Reduce stock when an order is placed



```

trigger StockDeductionTrigger on HandsMen_Order__c (after insert, after update) {
    Set<String> productIds = new Set<String>();
    for (HandsMen_Order__c order : trigger.new) {
        if (order.HandsMen_Product__c != null) {
            productIds.add(order.HandsMen_Product__c);
        }
    }
    if (productIds.isEmpty()) return;
    List<Inventory__c> inventoryList = new List<Inventory__c>();
    for (HandsMen_Order__c order : trigger.new) {
        for (Inventory__c inv : inventoryList) {
            if (inv.Inventory__c == order.HandsMen_Product__c) {
                if (order.Quantity__c >= inv.Minimum_Quantity__c) {
                    inv.InStock_QANTITY__C -= order.Quantity__c;
                    update inventoryList;
                }
            }
        }
    }
    if (List<Inventory__c>.size() > 0) {
        update inventoryList;
    }
}

```

3. OrderTrigger – Updates product quantity if an order is made

```

trigger OrderTrigger on HandsMen_Order__c (before insert, before update) {
    if (Trigger.isBefore && (Trigger.isInsert || Trigger.isUpdate)) {
        OrderTriggerHandler.validateOrderQuantity(Trigger.new);
    }
}

```

- **Batch jobs - InventoryBatchJob**

```

global class InventoryBatchJob implements Database.Batchable<Object>, 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<Object> scope) {
    }
    global void finish(Database.BatchableContext BC) {
    }
}

```

C. Testing Approach

1. Customer Creation

Input:

Output:

The left screenshot shows the "New HandsMen Customer" form with the following fields filled in:

- HandsMen Customer Name: Mayor Vico
- Owner: Danielle Escosa
- Email: danielleescosa@gmail.com
- Phone: (empty)
- Loyalty Status: Home
- Firstname: Mayor
- Lastname: Vico
- Total Purchases: (empty)

The right screenshot shows the "Mayor Vico" customer record in the "Details" tab, displaying the same information.

2. Products Creation

Input:

Output:

3. Order Creation and Status Update

Input:

Output:

4. Inventory Update

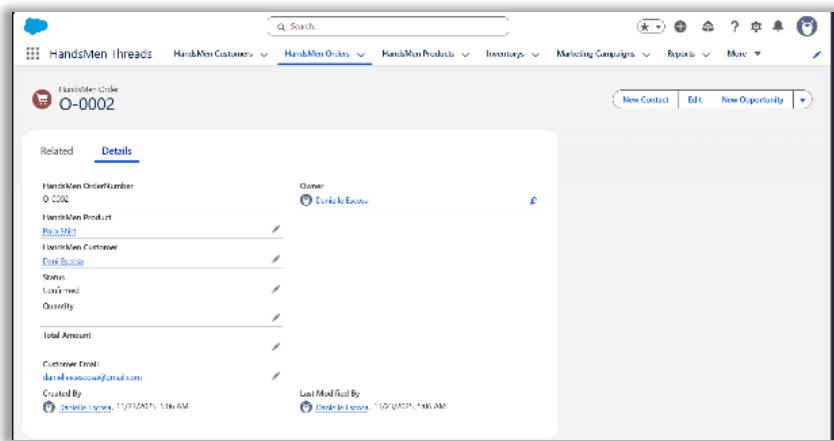
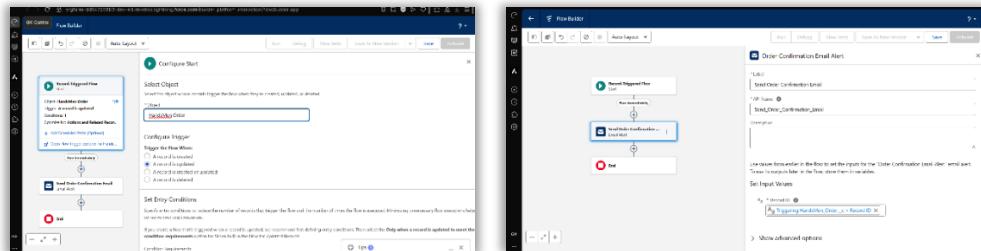
Input:

Output:

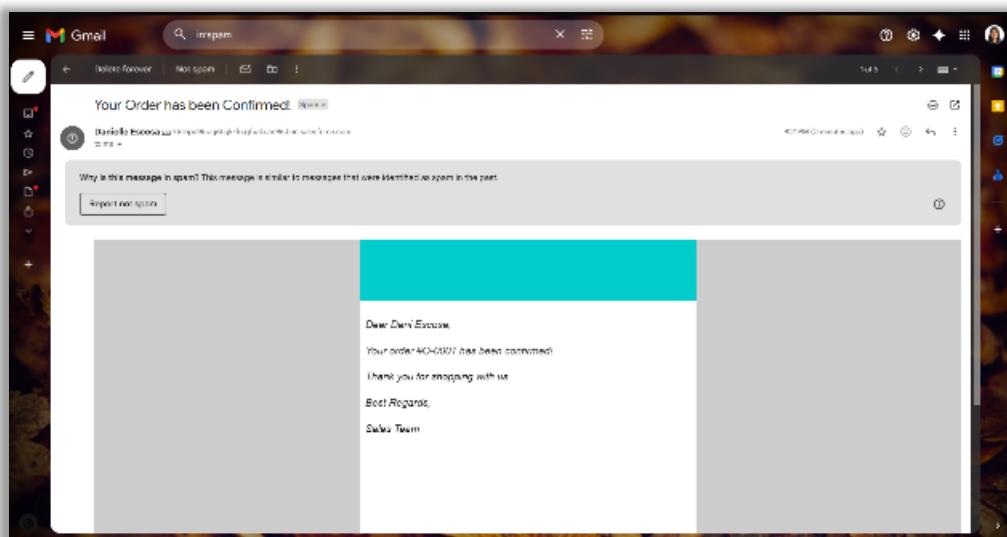
4. Flow Testing & Email Alerts

✓ Confirm order email triggers – order confirmation email

Input:

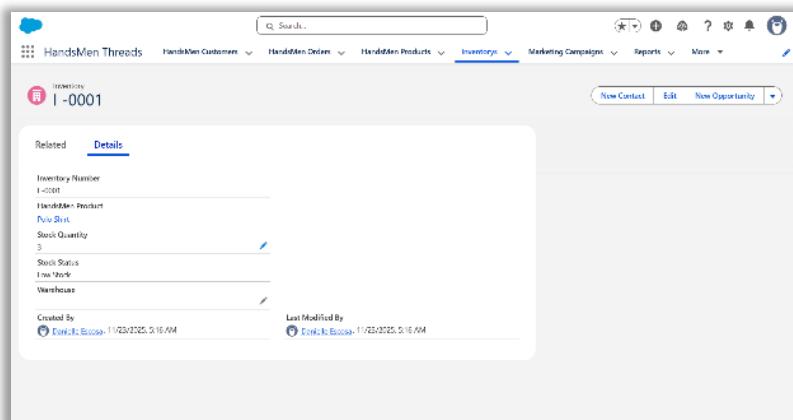
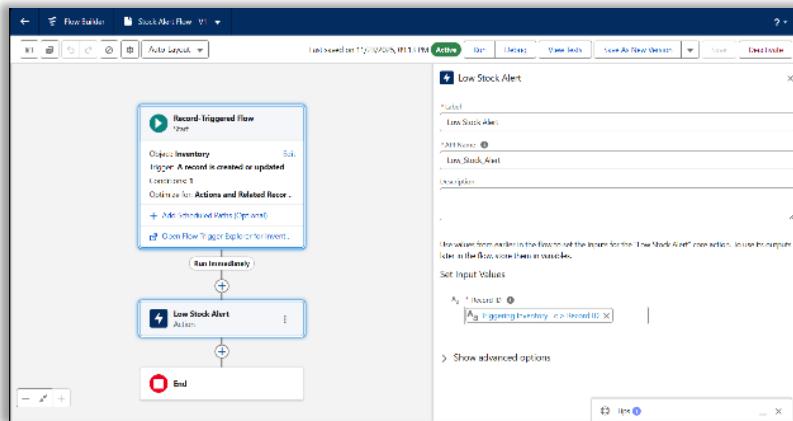


Output:

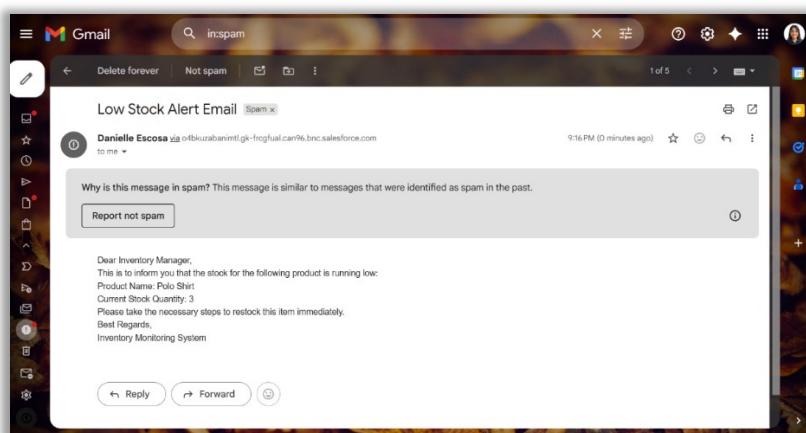


✓ Stock alert triggers – triggers when stocks are low (below 5)

Input:

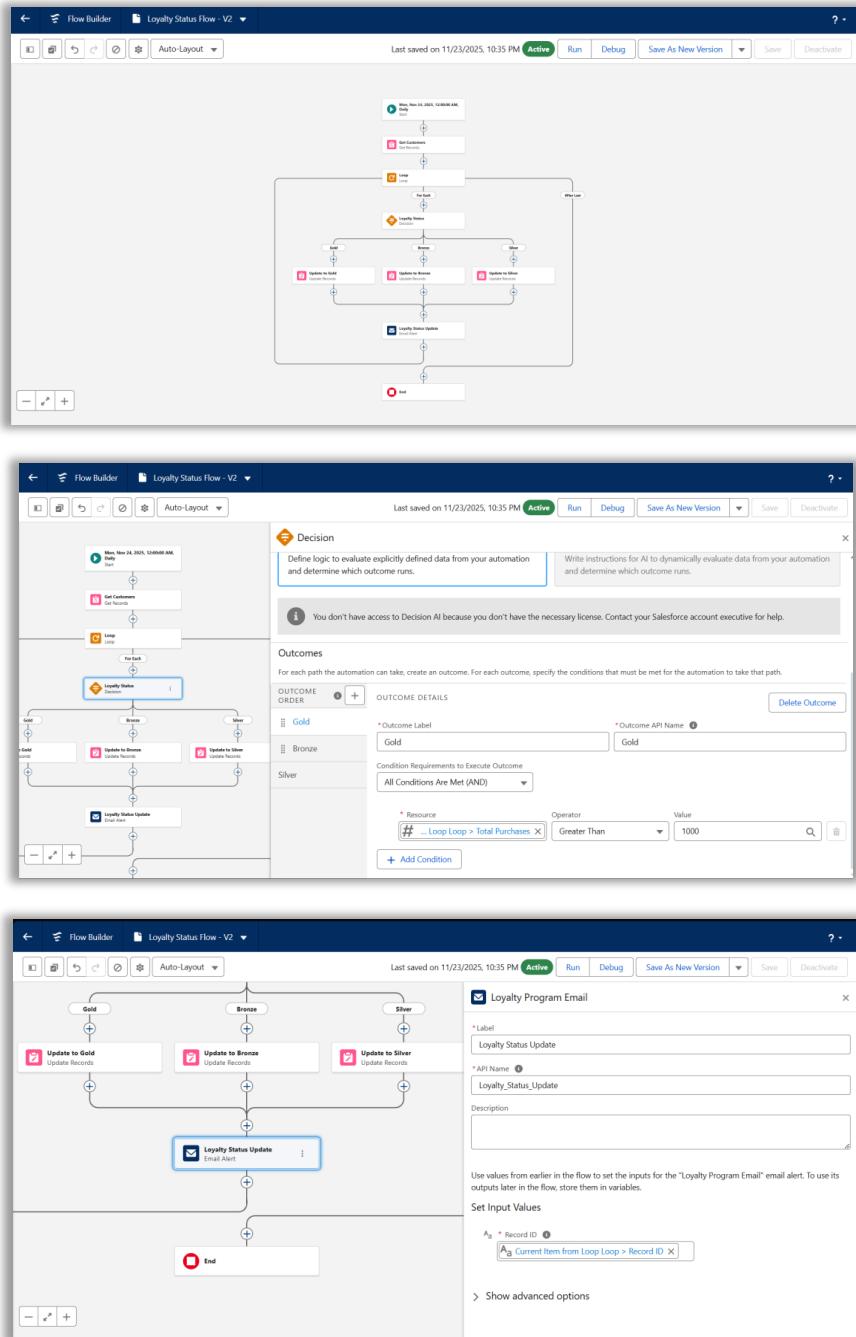


Output:



✓ Scheduled flow updates records (The email alert doesn't work, but it still updates in the system)

Input:



Phase 5: Deployment, Documentation & Maintenance

A. Deployment Strategy

The deployment of the **HandsMen Threads CRM** followed a controlled and structured process using **Salesforce Outbound and Inbound Change Sets** to ensure safe migration of all customizations from Sandbox to Production.

- **Components Deployed Using Change Sets**

All project components—custom objects (HandsMen Customer, Product, Order, Inventory, Marketing Campaign), fields, validation rules, flows, email alerts, Apex classes, permission sets, and page layouts—were packaged into an **Outbound Change Set** from the Sandbox. In Production, the **Inbound Change Set** was validated and deployed after passing all Apex test requirements and dependency checks.

- **UAT Conducted in Sandbox**

User Acceptance Testing (UAT) was performed in the Sandbox to verify the functionality of key features such as order confirmation flows, stock alert automation, scheduled processes, validation rules, email alerts, security settings, and Apex logic. All test scenarios reflected real business operations and were approved before deployment.

- **Deployment Logs Maintained**

A deployment log was maintained to record all actions, including deployed components, test results, validation summaries, UAT approvals, issue resolutions, and final deployment status. This ensures full traceability and accountability throughout the rollout.

B. Maintenance & Monitoring

- Monthly checks for Apex job execution logs
- Review inventory threshold settings
- Add/remove users based on staffing

C. Troubleshooting Approach

- Use Debug Logs for automation issues
- Use Flow Error Email Notifications
- Apex exception logging for batch failures

Future Enhancements

To further elevate the functionality and customer experience of the HandsMen Threads CRM, several future enhancements may be implemented:

1. Chatbot Integration for Customer Support

Integration of a Salesforce-powered or third-party chatbot to provide real-time customer assistance, automate common inquiries, and improve service efficiency.

2. AI Recommendation Engine for Product Styling

Implementation of an AI-driven recommendation system to personalize product suggestions based on customer preferences, purchase history, and style profiles.

3. SMS Notifications Using Twilio

Enabling SMS alerts through Twilio for order updates, stock notifications, and promotional messages to enhance timely and direct customer communication.

4. Full Integration with an E-Commerce Website

Connecting the CRM with the brand's e-commerce platform to synchronize orders, customer profiles, and inventory, enabling a seamless end-to-end shopping experience.

5. Einstein Analytics Dashboards

Adoption of Einstein Analytics (CRM Analytics) to generate advanced dashboards, provide deeper insights, and support data-driven decision-making across sales, inventory, and customer engagement.

Conclusion

The HandsMen Threads CRM successfully improves customer engagement, automates order management processes, and enhances operational efficiency. Through the combination of custom objects, flows, Apex logic, and structured security, the CRM provides a scalable and reliable data foundation for the business. The solution sets the stage for future advanced features such as AI-driven recommendations and full omnichannel integration.

REFERENCE

ICON LINK: https://www.flaticon.com/free-icon/tuxedo_195483