

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

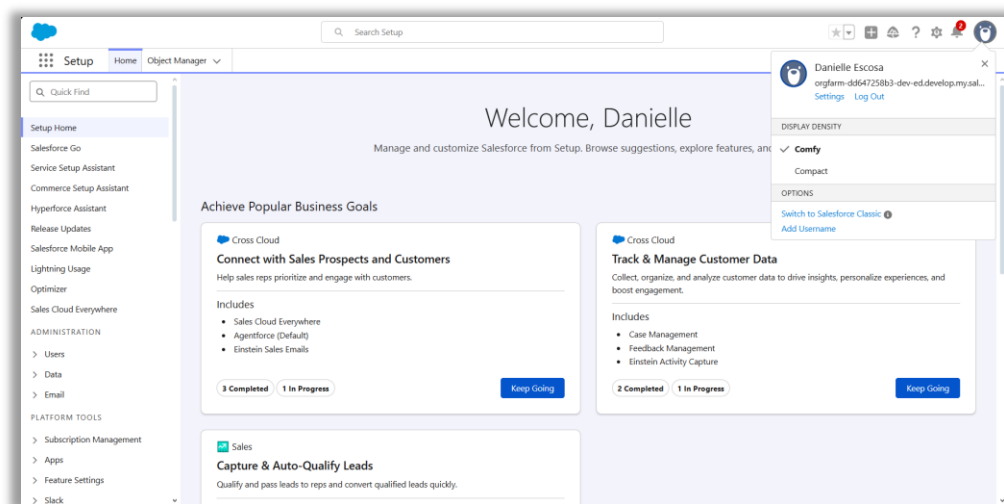
- Unit testing of objects and automation.
- End-to-end testing with sample data.
- Performance testing and security checks.

Phase 4: Deployment & Training

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

Phase 2: Salesforce Development – Backend & Configurations

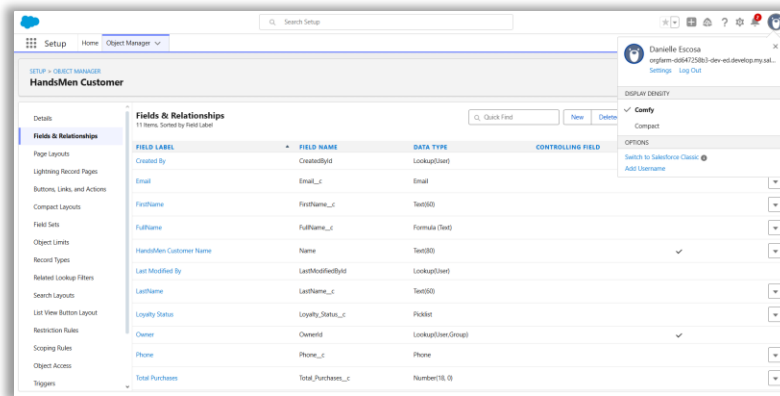
A. Environment Setup & DevOps



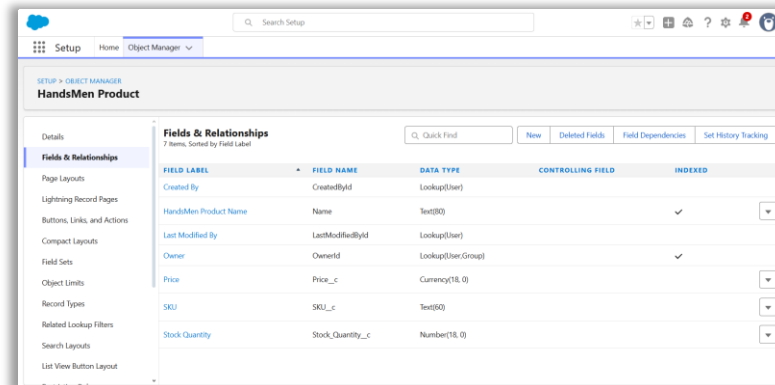
B. Customization of Objects and Fields

Custom objects created:

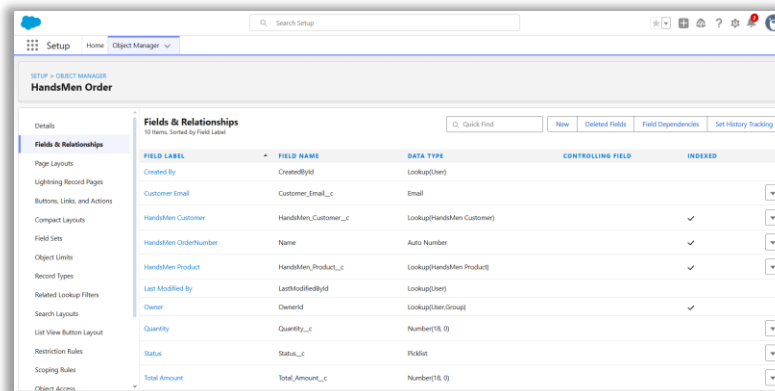
- **HandsMen Customer** – Stores customer information and profiles for tracking interactions and orders.



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



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



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

SETUP > OBJECT MANAGER

Inventory

Details

Fields & Relationships

7 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

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.

SETUP > OBJECT MANAGER

Marketing Campaign

Details

Fields & Relationships

7 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

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

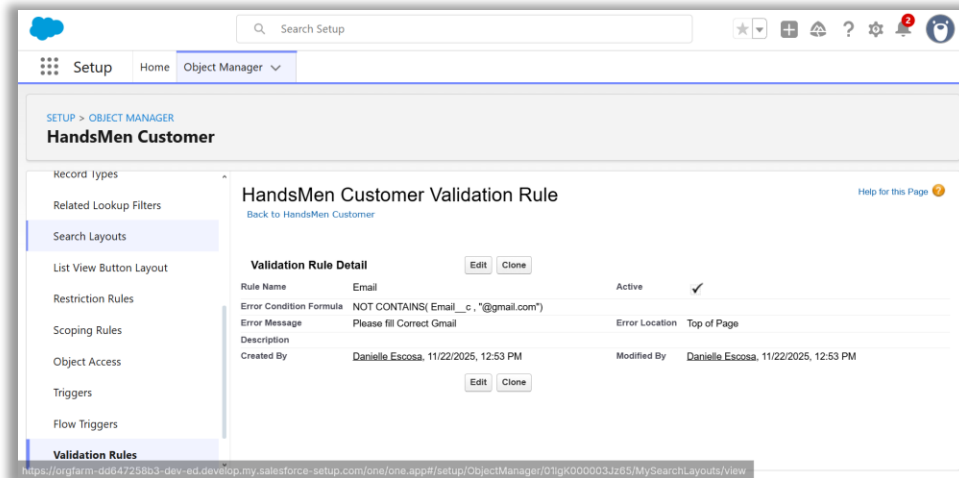
Examples:

- **Valid Email Format**

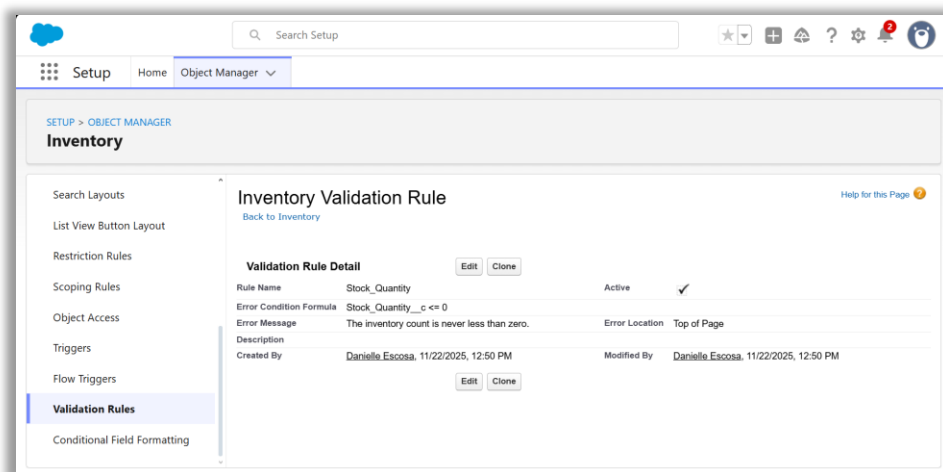
Object: HandsMen Customer__c

Field: Email

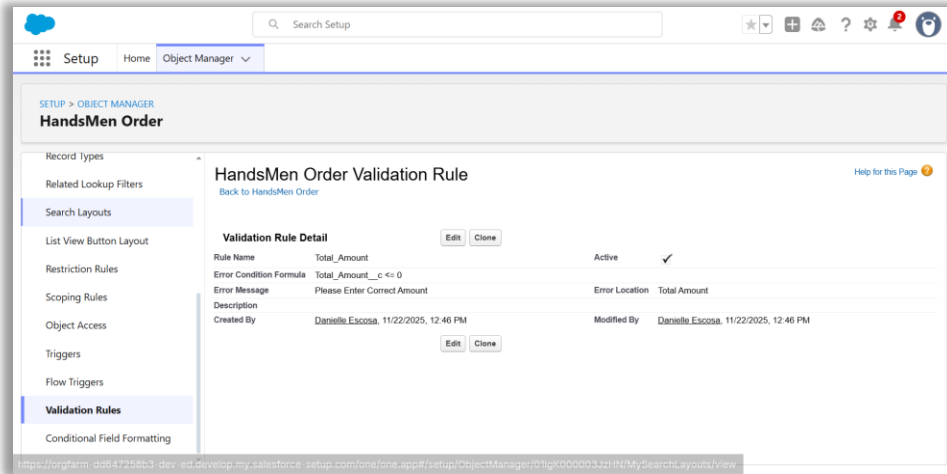
Validation Rule: NOT CONTAINS(Email, "@gmail.com")



- **Stock cannot be negative**
 Object: Inventory__c
 Field: Stock_Quantity__c
 Validation Rule: $\text{Stock_Quantity_c} \leq 0$



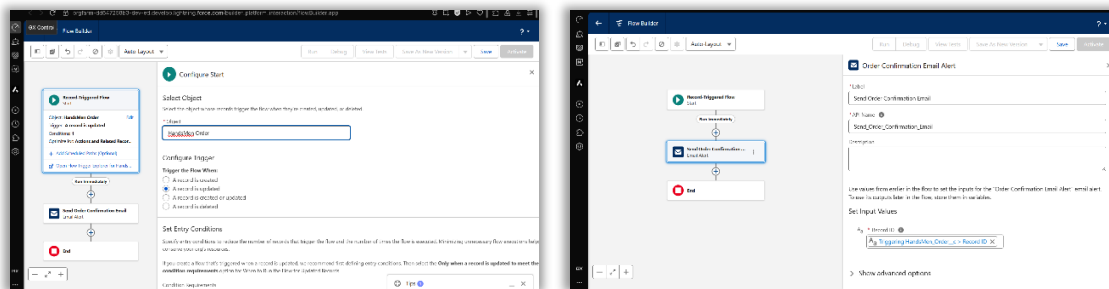
- **Correct Order Amount**
 Object: HandsMen Order__c
 Field: Total_Amount__c
 Validation Rule: $\text{Total_Amount_c} \leq 0$



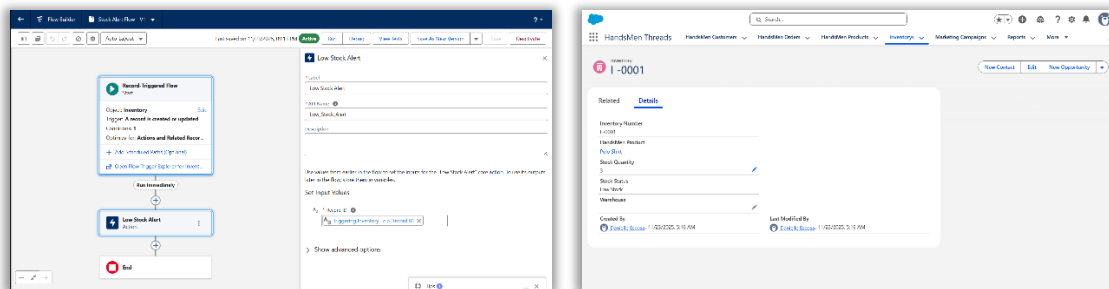
D. Automation (Flows, Workflow Rules, Approval Process)

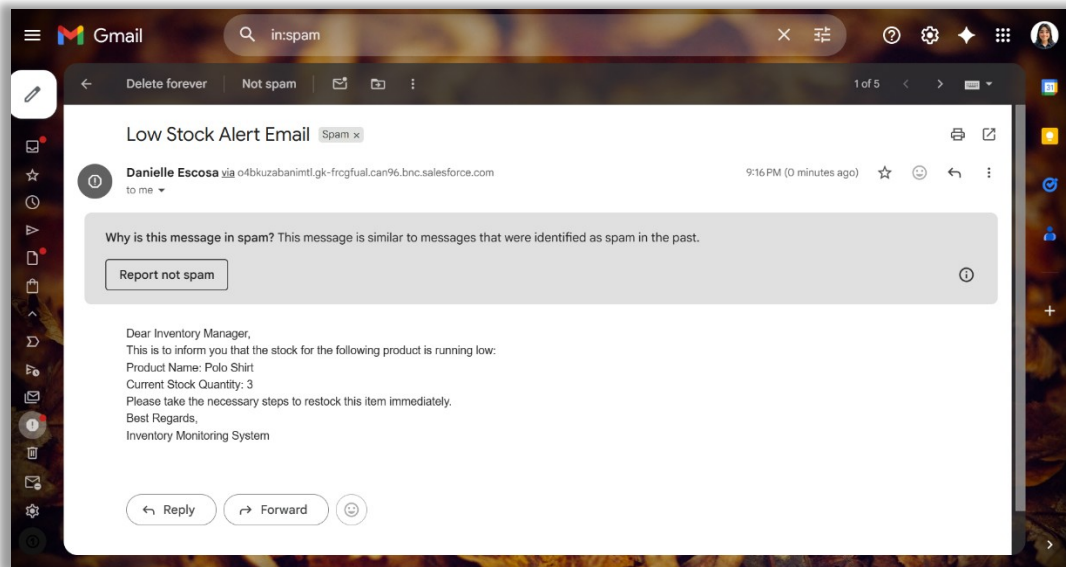
Flows Implemented

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

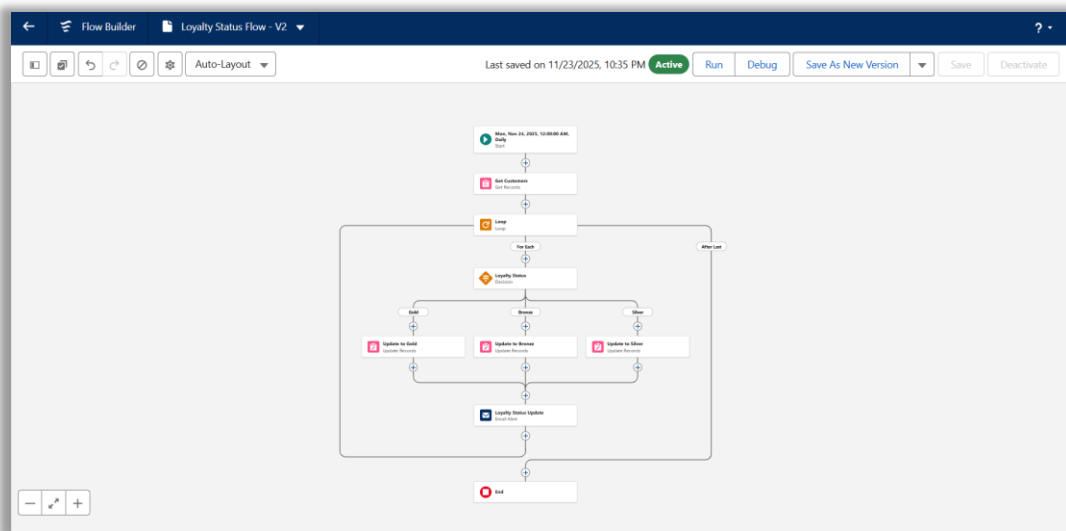


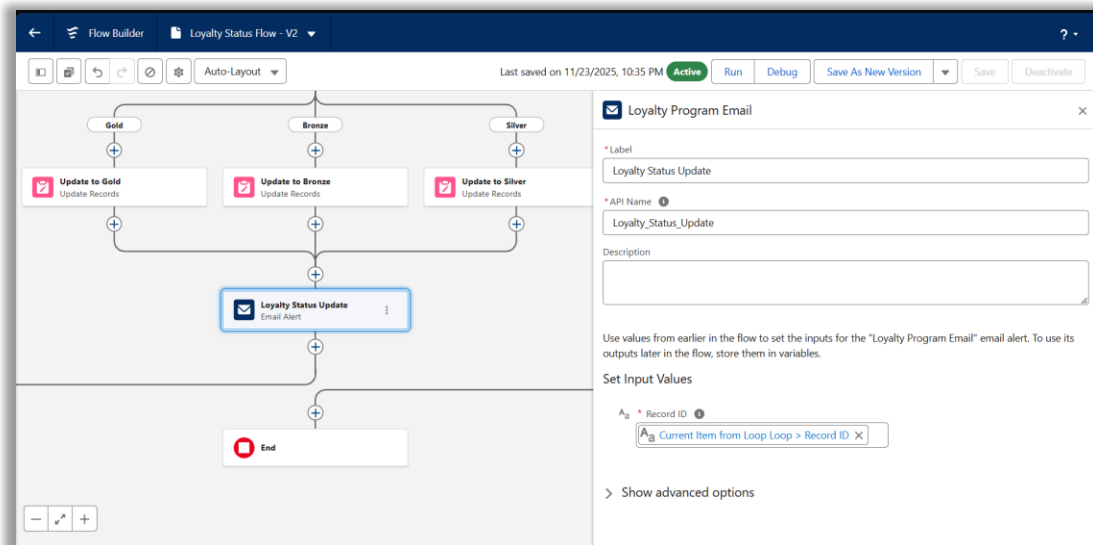
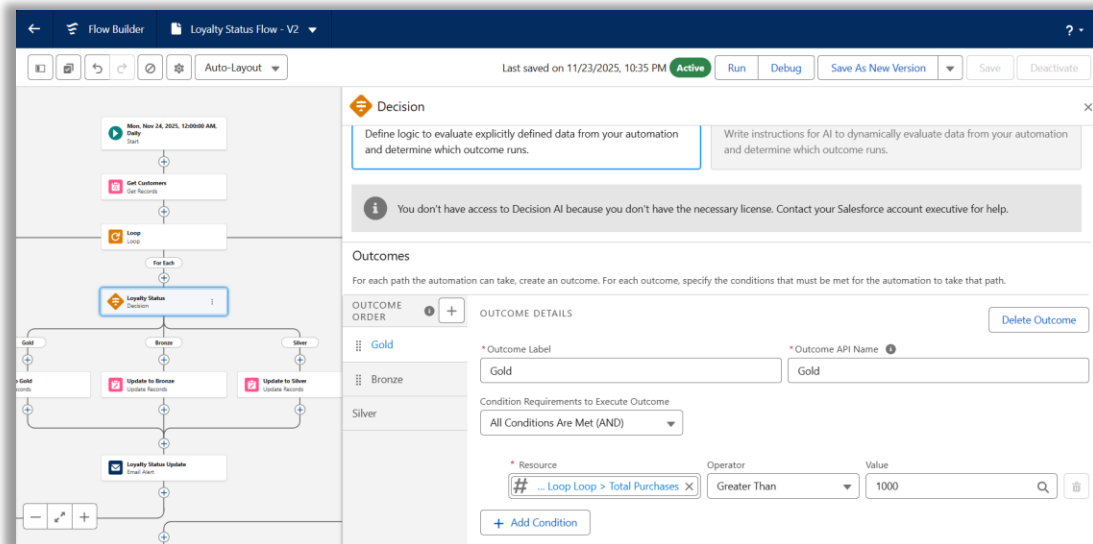
2. Stock Alert Flow – Triggers email when stock < 5





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

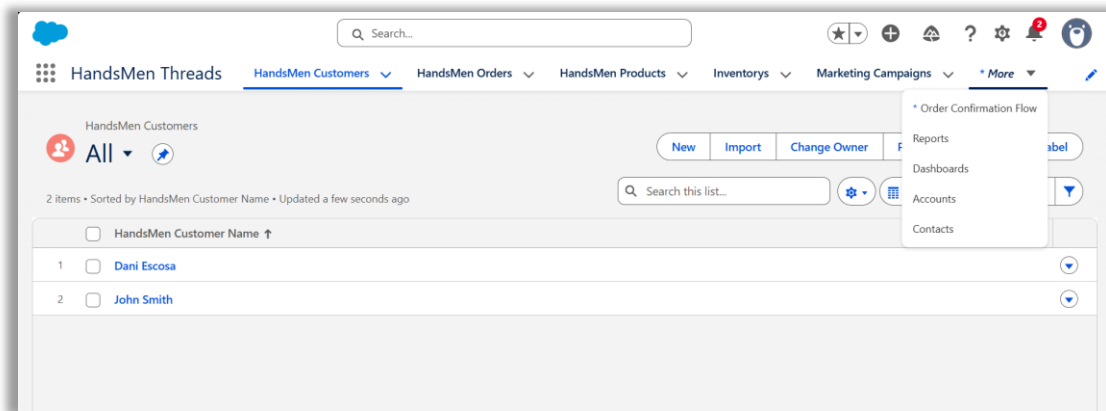
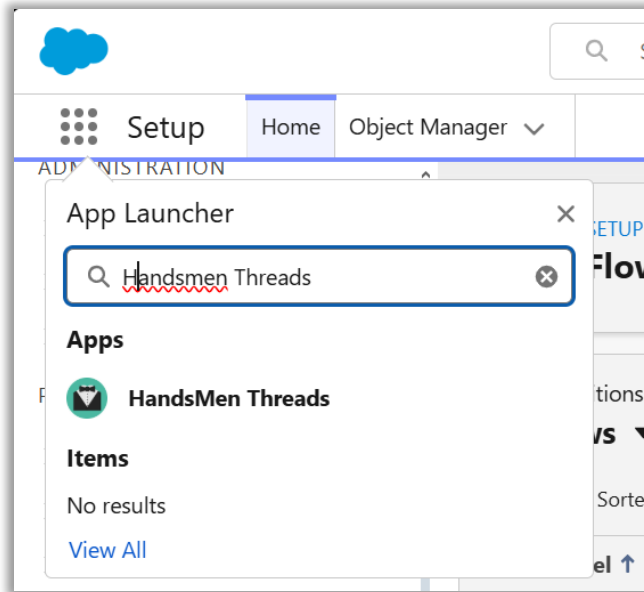




Phase 3: UI/UX Development & Customization

A. Lightning App Setup

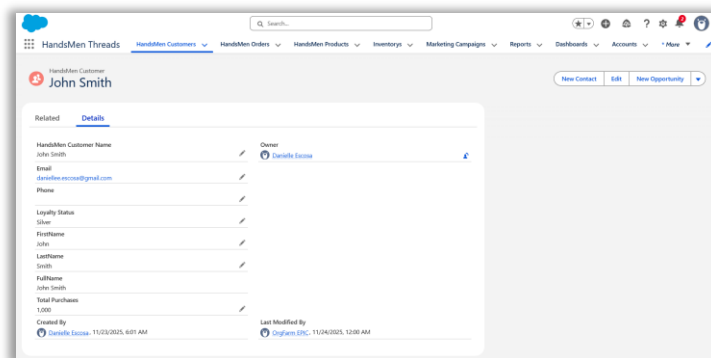
App Name: HandsMen Threads - Includes navigation items for customers, orders, inventory, products.



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.



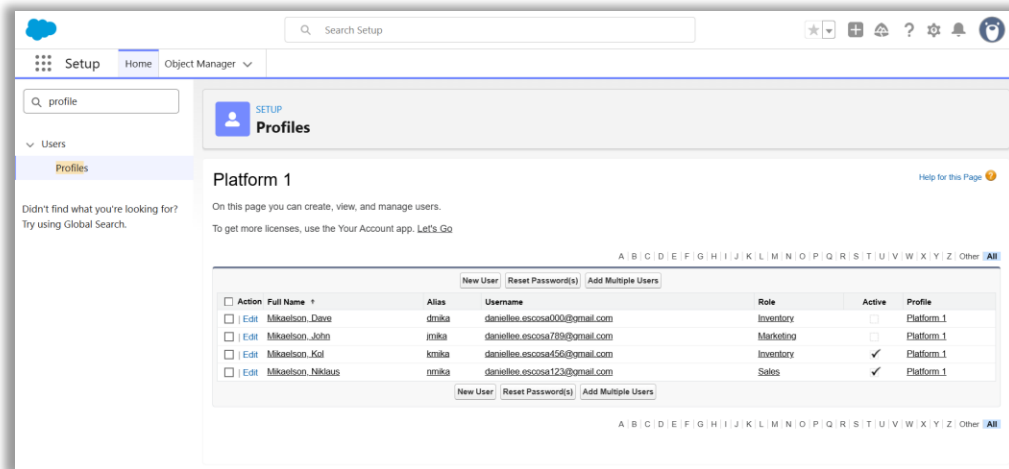
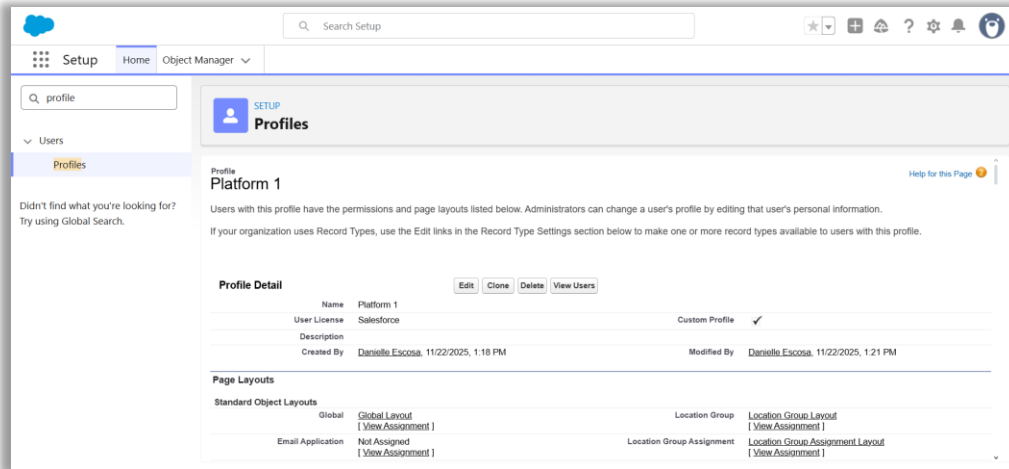
- **Loyalty Summary** – shows user’s loyalty status whether they are upgraded to Bronze, Silver, or Gold depending on their total amount of purchases.

The screenshot displays the 'HandsMen Threads' CRM interface. The 'Details' tab for a customer named John Smith is active. The form contains the following fields: 'HandsMen Customer Name' (John Smith), 'Email' (danielle.escosa@gmail.com), 'Phone' (empty), 'Loyalty Status' (Silver), 'First Name' (John), 'Last Name' (Smith), 'Full Name' (John Smith), and 'Total Purchases' (1,000). The 'Owner' is listed as Danielle Escosa. The form was created by Danielle Escosa on 11/23/2025 at 6:07 AM and last modified by Chyghem DMC on 11/24/2025 at 12:00 AM. Buttons for 'Cancel' and 'Save' are at the bottom.

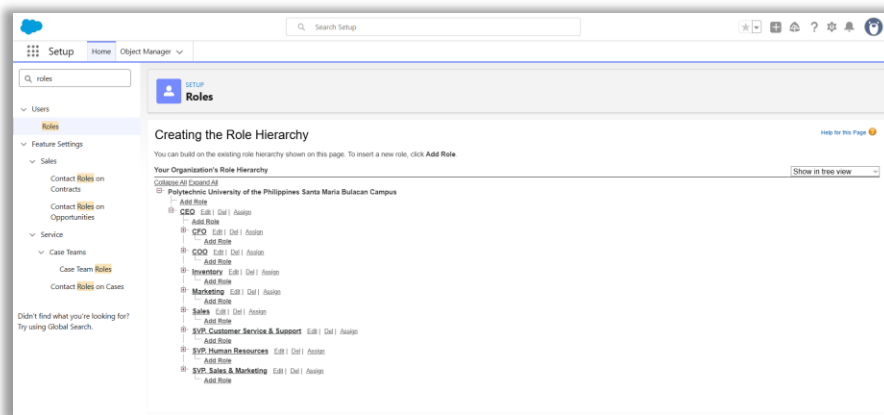
- **Order Items** – list of orders

The screenshot shows the 'HandsMen Orders' section with a 'Recently Viewed' filter. The list contains four items, each with a checkbox and an order number: 1. ☐ O-0006, 2. ☐ O-0001, 3. ☐ O-0005, and 4. ☐ O-0002. The list is updated a few seconds ago. Search and filter icons are available at the top right of the list.

The screenshot displays the 'HandsMen Order' details for order O-0006. The 'Details' tab is active. The form contains the following fields: 'HandsMen OrderNumber' (O-0006), 'HandsMen Product' (Polo Shirt), 'HandsMen Customer' (John Smith), 'Status' (Confirmed), 'Quantity' (501), 'Total Amount' (2,505), 'Customer Email' (johnsmith@gmail.com), and 'Owner' (Danielle Escosa). The order was created by Danielle Escosa on 11/23/2025 at 10:48 AM and last modified by Danielle Escosa on 11/23/2025 at 10:48 AM. Buttons for 'New Contact', 'Edit', and 'New Opportunity' are at the top right.



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



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

Permission Set: Permission_Platform_1

API Name: Permission_Platform_1 | License: --- | Created By: Danielle Escosa | Last Modified By: Danielle Escosa

Namespace Prefix: --- | Session Activation Required: Not Required | Created Date: 11/26/2025, 3:37 AM | Last Modified Date: 11/26/2025, 3:39 AM

Related Permission Set Groups: 0 | Assigned Users: 1

Description: ---

Permission Set Information

See the permissions enabled for this permission set and the permission set groups it's added to.

Related Permission Set Groups | User Permissions | **Object Permissions** | Field Permissions | Custom Permissions | Tabs

1 item

Label	Object API Na...	Read	Create	Edit	Delete	View All Records	Modify All Rec...	View All Fields
HandMen Customer	HandMen_Custom...	✓	✓	✓	✓	✗	✗	✗

Permission Platform 1

Current Assignments

Full Name ? | Active | Role | Profile | User License | Expires On

Niklaus Mickaelson	✓	Sales	Platform 1	Salesforce	
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User: Niklaus Mickaelson

User Detail

Name	Niklaus Mickaelson	Role	Sales
Alias	nmika	User License	Salesforce
Email	danielle.escosa@gmail.com (Modify)	Profile	Platform 1
Username	danielle.escosa123@gmail.com	Active	✓
Nickname	User1763891246741280131	Marketing User	✗
Title		Offline User	✗
Company		Knowledge User	✗
Department		Flow User	✗
Division		Service Cloud User	✗
Address		Site.com Contributor User	✗
Time Zone	(GMT-08:00) Pacific Standard Time (America/Los_Angeles)	Site.com Publisher User	✗
Locale	English (United States)	WDC User	✗
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	(X)
Manager		Accessibility Mode (Classic Only)	(X)

Permission Set Assignments

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

Permission Sets

API Name: Sales_Permission_Set
 Namespace Prefix: --
 License: --
 Session Activation Required: Not Required
 Created By: Danielle Escosa
 Created Date: 11/23/2025, 3:06 AM
 Last Modified By: Danielle Escosa
 Last Modified Date: 11/23/2025, 3:07 AM
 Related Permission Set Groups: 0
 Assigned Users: 1
 Description: --

Permission Set Information

See the permissions enabled for this permission set and the permission set groups it's added to.

Related Permission Set Groups User Permissions **Object Permissions** Field Permissions Custom Permissions Tabs

2 Items

Label	Object API Name	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields
HandsMen Customer	HandsMen_Customer__c	✓	✓	✓	✓	✗	✗	✗
HandsMen Order	HandsMen_Order__c	✓	✓	✓	✓	✗	✗	✗

Permission Sets

API Name: Inventory_Permission_Set
 Namespace Prefix: --
 License: --
 Session Activation Required: Not Required
 Created By: Danielle Escosa
 Created Date: 11/23/2025, 3:08 AM
 Last Modified By: Danielle Escosa
 Last Modified Date: 11/23/2025, 3:13 AM
 Related Permission Set Groups: 0
 Assigned Users: 1
 Description: --

Permission Set Information

See the permissions enabled for this permission set and the permission set groups it's added to.

Related Permission Set Groups User Permissions **Object Permissions** Field Permissions Custom Permissions Tabs

2 Items

Label	Object API Name	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields
HandsMen Product	HandsMen_Product__c	✗	✗	✗	✗	✗	✗	✗
Inventory	Inventory__c	✓	✗	✓	✗	✗	✗	✗

Permission Sets

API Name: Marketing_Permission_Set
 Namespace Prefix: --
 License: --
 Session Activation Required: Not Required
 Created By: Danielle Escosa
 Created Date: 11/23/2025, 4:07 AM
 Last Modified By: Danielle Escosa
 Last Modified Date: 11/23/2025, 4:09 AM
 Related Permission Set Groups: 0
 Assigned Users: 1
 Description: --

Permission Set Information

See the permissions enabled for this permission set and the permission set groups it's added to.

Related Permission Set Groups User Permissions **Object Permissions** Field Permissions Custom Permissions Tabs

2 Items

Label	Object API Name	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields
HandsMen Customer	HandsMen_Customer__c	✓	✗	✗	✗	✗	✗	✗
Marketing Campaign	Marketing_Campaign__c	✓	✗	✓	✗	✗	✗	✗

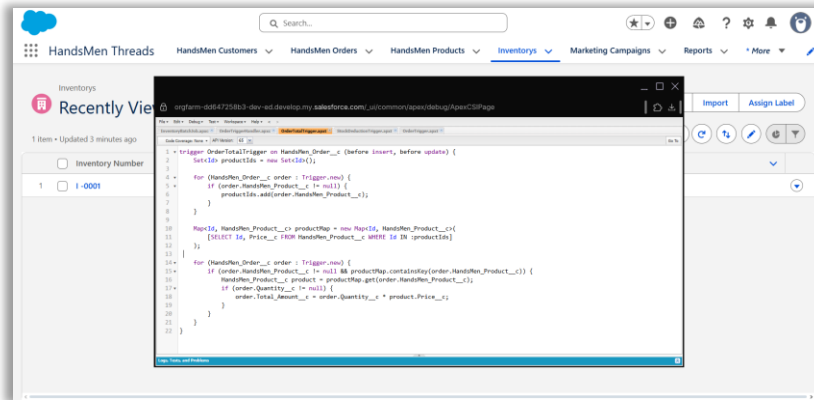
B. Test Classes

Test classes written for:

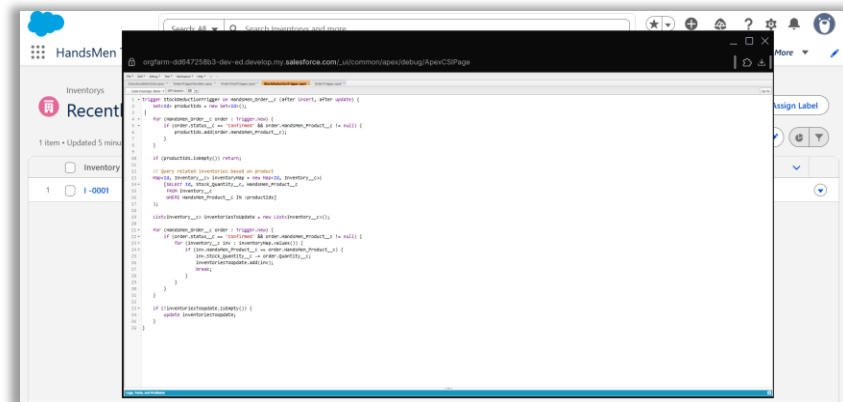
- Apex Classes – OrderTriggerHandler

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

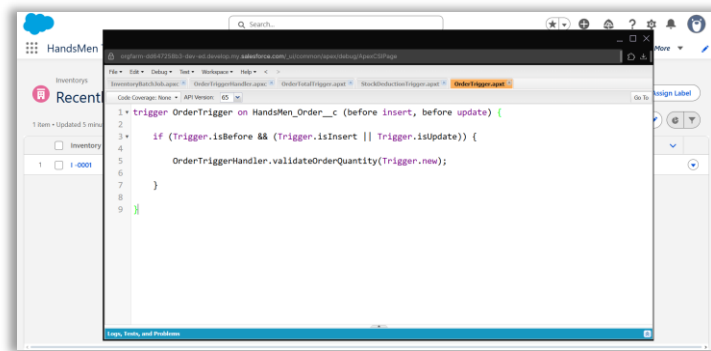
1. OrderTotalTrigger - Auto-update Total_Amount__c on order save



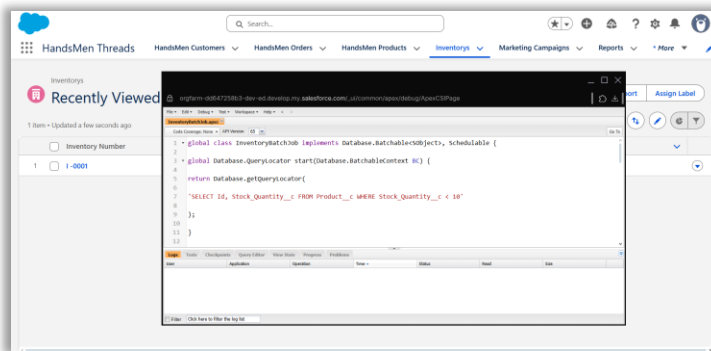
2. StockDeductionTrigger - Reduce stock when an order is placed



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



- **Batch jobs - InventoryBatchJob**



C. Testing Approach

1. Customer Creation

Input:

The screenshot shows the 'New HandsMen Customer' form. The form has the following fields:

- HandsMen Customer Name (Text field)
- Owner (Dropdown menu, currently showing Danielle Escosa)
- Email (Text field, currently showing danielle.escosa@gmail.com)
- Phone (Text field)
- Loyalty Status (Dropdown menu, currently showing None)
- First Name (Text field)
- Last Name (Text field)
- Total Purchases (Text field)

Output:

The screenshot shows the 'HandsMen Customer' detail page for Mayor Vico. The page displays the following information:

- HandsMen Customer Name: Mayor Vico
- Owner: Danielle Escosa
- Email: danielle.escosa@gmail.com
- Phone:
- Loyalty Status:
- First Name: Mayor
- Last Name: Vico
- Full Name: Mayor Vico
- Total Purchases:
- Created By: Danielle Escosa
- Last Modified By: Danielle Escosa

2. Products Creation

Input:

Output:

3. Order Creation and Status Update

Input:

Output:

4. Inventory Update

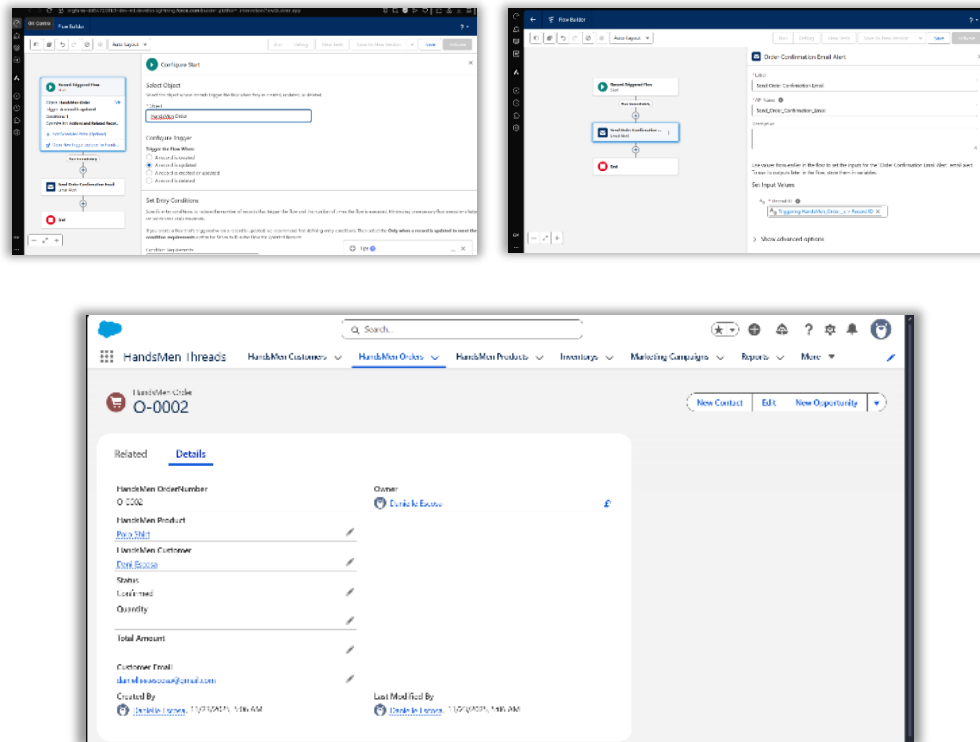
Input:

Output:

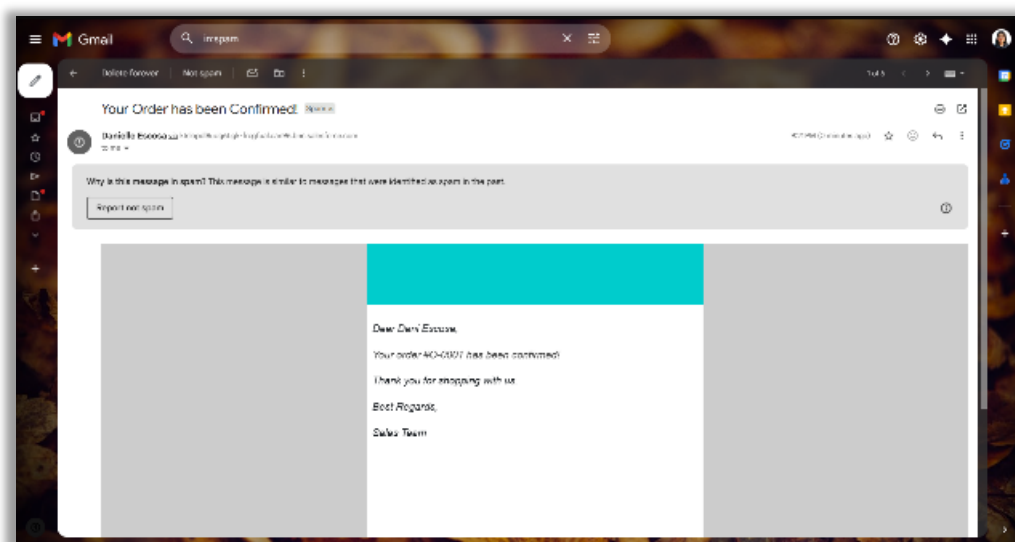
4. Flow Testing & Email Alerts

✓ Confirm order email triggers – order confirmation email

Input:

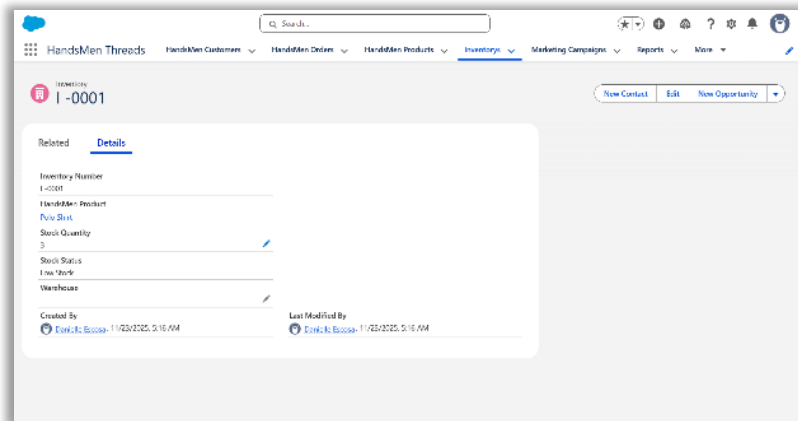
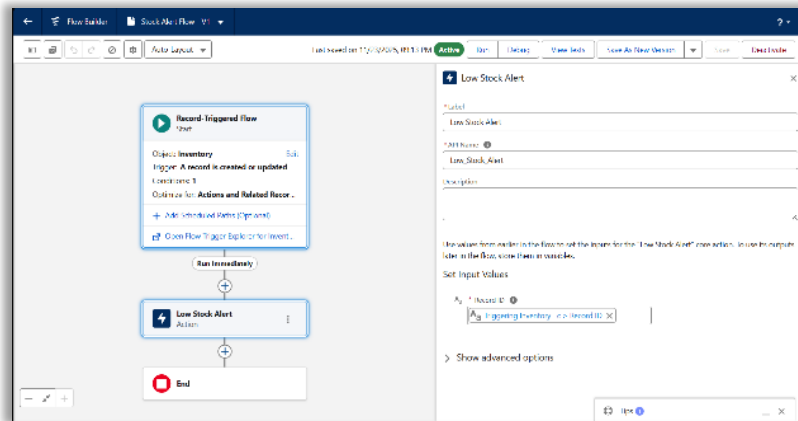


Output:

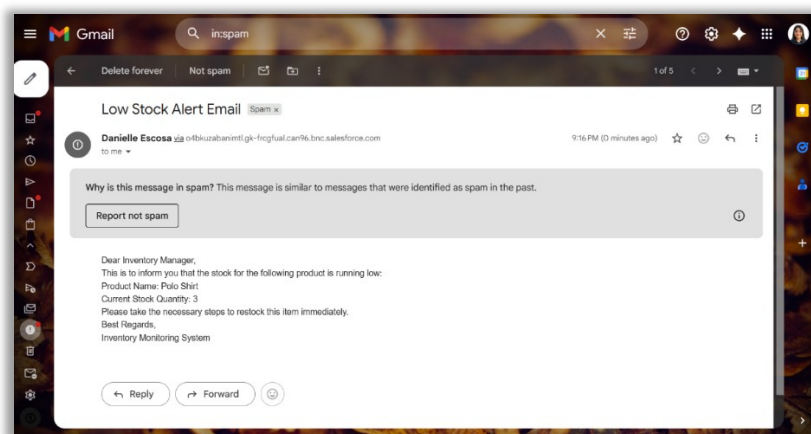


✓ Stock alert triggers – triggers when stocks are low (below 5)

Input:

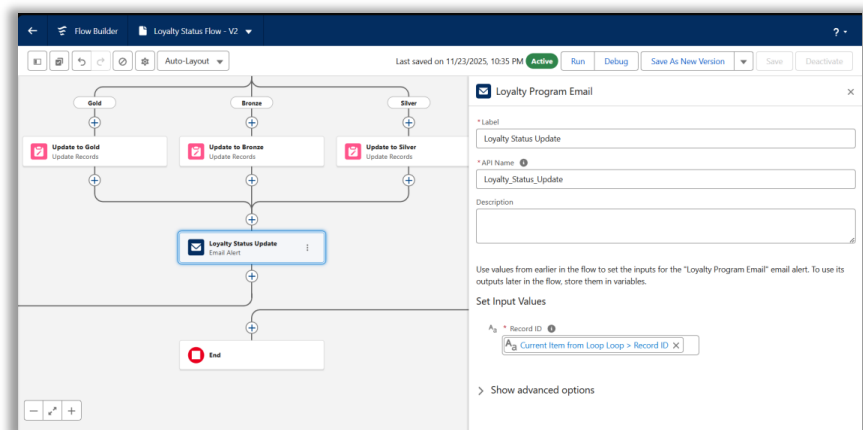
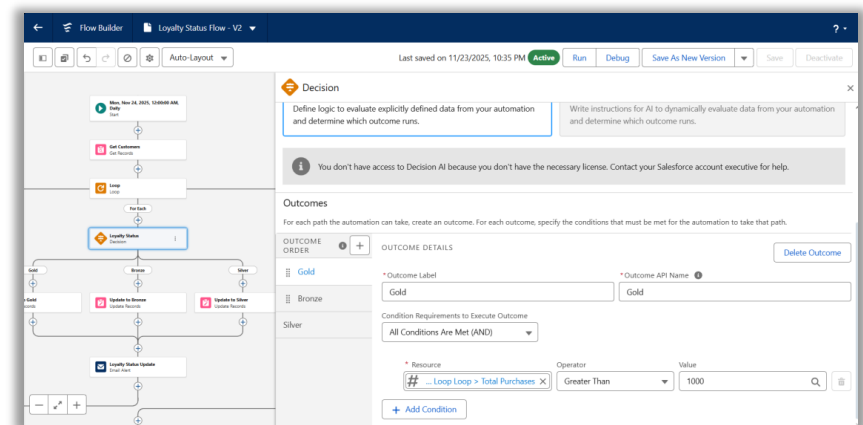
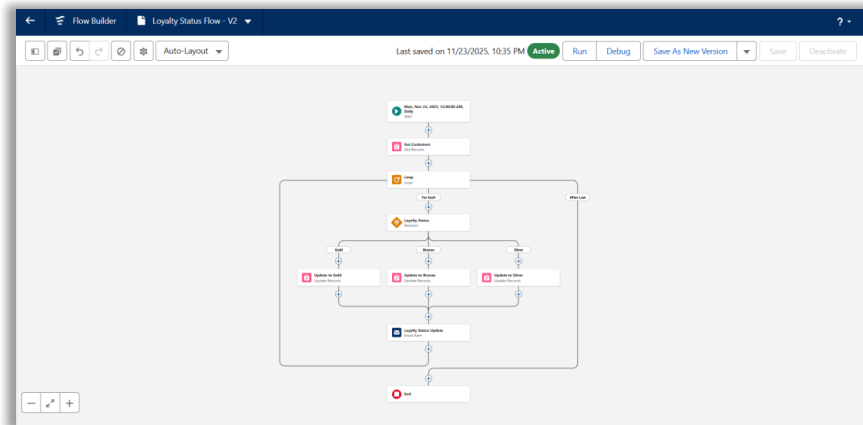


Output:



✓ **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