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

Project Overview

HandsMen Threads is a men’s fashion brand that offers premium and custom-made clothing. The company wants to use Salesforce to make customer service better, keep data organized, and make many tasks automatic. The CRM system will help the business track customers, products, orders, inventory, and promotions. With Salesforce, the company can improve customer experience, avoid errors, save time, and grow smoothly.

Objectives

The main goal of this Salesforce project is to build a simple, organized, and automated system. This system helps the business do the following:

- Manage customer information easily
- Track custom orders with automatic confirmation emails
- Monitor stock levels in real time
- Update customer loyalty status automatically based on spending
- Help the marketing team manage promotions and customers
- Reduce manual work and mistakes
- Improve service and customer satisfaction

PHASE 1: Requirement Analysis & Planning

Understanding Business Requirements

- The business needs one place to store all customer information.
- The system must track orders clearly and send confirmation emails.
- The inventory must update correctly to avoid running out of items.
- Customer loyalty levels must update based on how much they buy.
- The marketing team needs to link customers to promotions easily.
- The system must send email alerts for important actions.

Defining Project Scope and Objectives

- Create custom objects for customers, products, orders, inventory, and campaigns.
- Add lookup and master-detail relationships for clean data structure.
- Create automation using Flows, Apex Triggers, and email alerts.
- Add validation rules to prevent wrong data.
- Build batch jobs for daily updates.
- Set up secure access using Profiles, Roles, and Permission Sets.

Data Model & Security Model

1. **Object:** HandsMen Customer

Fields

Field Label	API Name	Type
Customer Name	Customer_Name__c	Text
First Name	FirstName__c	Text
Last Name	LastName__c	Text
Full Name	FullName__c	Formula (Text)
Email	Email__c	Email
Phone	Phone__c	Phone
Loyalty Status	Loyalty_Status__c	Picklist (Gold, Silver, Bronze)
Total Purchases	Total_Purchases__c	Number

2. Object: HandsMen Product

Fields

Field Label	API Name	Type
Product Name	Product_Name__c	Text
SKU	SKU__c	Text
Price	Price__c	Currency

3. Object: HandsMen Order

Fields

Field	API Name	Type
Order Number	Order_Number__c	Auto Number (O-{0000})
Quantity	Quantity__c	Number
Total Amount	Total_Amount__c	Currency
Status	Status__c	Picklist (Confirmed, Pending, Cancelled)
Customer Email	Customer_Email__c	Email

4. Object: HandsMen Inventory

Fields

Field	API Name	Type
Inventory Number	Inventory_Number__c	Auto Number (I-{0000})
Stock Quantity	Stock_Quantity__c	Number
Stock Status	Stock_Status__c	Picklist (Available, Low Stock, Out of Stock)
Warehouse	Warehouse__c	Text

5. Object: Marketing Campaign

Fields

Field	API Name	Type
Campaign Number	Campaign_Number__c	Auto Number
Start Date	Start_Date__c	Date
End Date	End_Date__c	Date
Owner	OwnerId	Lookup(User)

Security Model:

Profile: Platform 1

Roles:

- Marketing
- Inventory
- Sales

Role 1: Marketing
Label: Marketing
Role Name: Marketing
Reports To: CEO
Access Settings:

Setting	Meaning
Opportunity Access	Users in this role can edit all opportunities linked to accounts they own (even if another user owns the opportunity).
Case Access	Users in this role can edit all cases linked to accounts they own.

Role 2: Inventory
Label: Inventory
Role Name: Inventory
Reports To: CEO
Access Settings:

Setting	Meaning
Opportunity Access	Can edit all opportunities linked to accounts they own.
Case Access	Can edit all cases linked to accounts they own.

Role 3: Sales
Label: Sales
Role Name: Sales
Reports To: CEO
Access Settings:

Setting	Meaning
Opportunity Access	Can edit all opportunities linked to accounts they own.
Case Access	Can edit all cases linked to accounts they own.

Stakeholder Mapping

Stakeholder	Role
Sales Manager	Handles orders and customers
Inventory Manager	Checks and updates stock
Marketing Team	Handles campaigns and promotions

Execution RoadMap

1. Gather Requirements
2. Design Data Model
3. Build Automations
4. Customize UI
5. Test the System
6. Deploy
7. Train Users
8. Support After Go-Live

PHASE 2: Salesforce Development – Backend & Configurations

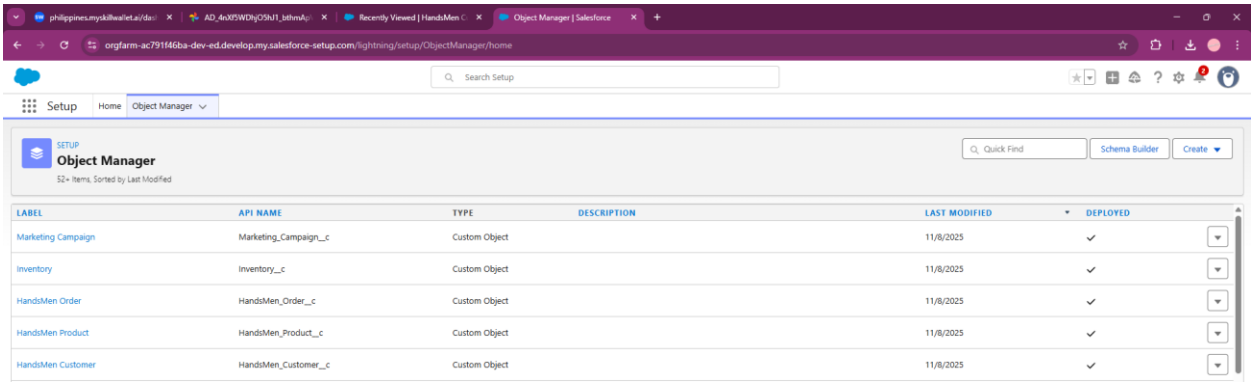
Environment Setup: Special Configuration Trailhead Playground

Custom Object & Field Creation

Custom Objects:

Object	Type	Purpose
HandsMen Customer	Text	Saves customer information
HandsMen Product	Text	Saves product details
HandsMen Order	Auto Number	Saves customer orders
Inventory	Auto Number	Tracks product stock
Marketing Campaign	Auto Number	Stores promotion details

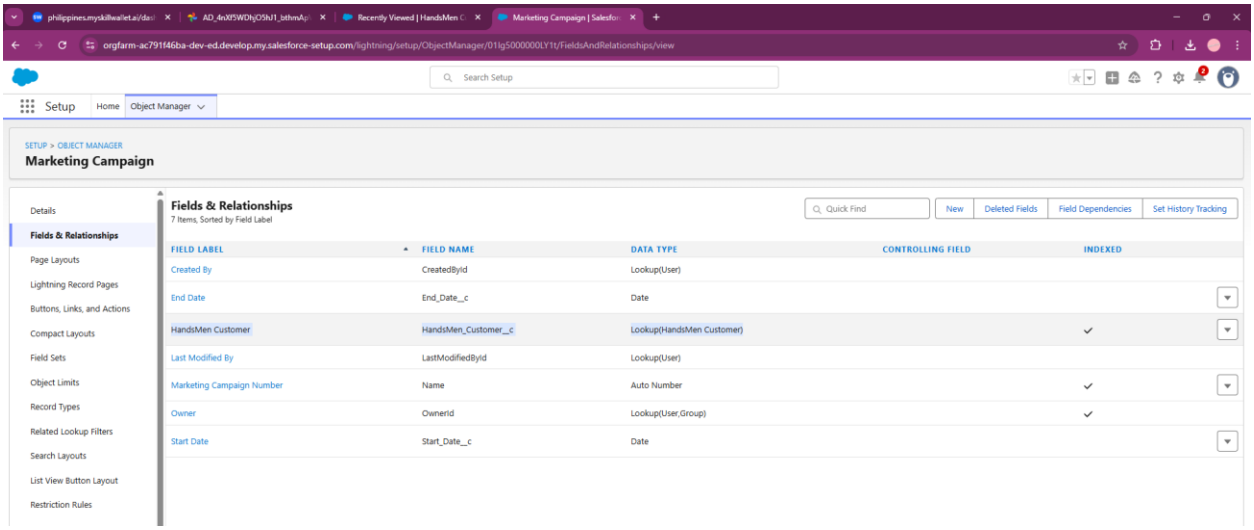
Screenshot:



Relationships

- Marketing Campaign → HandsMen Customer (Lookup)
- HandsMen Order → HandsMen Product (Lookup)
- HandsMen Order → Customer (Lookup)
- Inventory → Product (Master-Detail)

Screenshots:



Search Setup

Setup | Home | Object Manager

SETUP > OBJECT MANAGER

HandsMen Order

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

Fields & Relationships

10 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)		
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)		

SETUP > OBJECT MANAGER

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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)		

Search Setup

Setup | Home | Object Manager

SETUP > OBJECT MANAGER

Inventory

Details
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Triggers

Fields & Relationships

7 Items, Sorted by Field Label

Quick Find | New | Deleted Fields | Field Dependencies | Set History Tracking

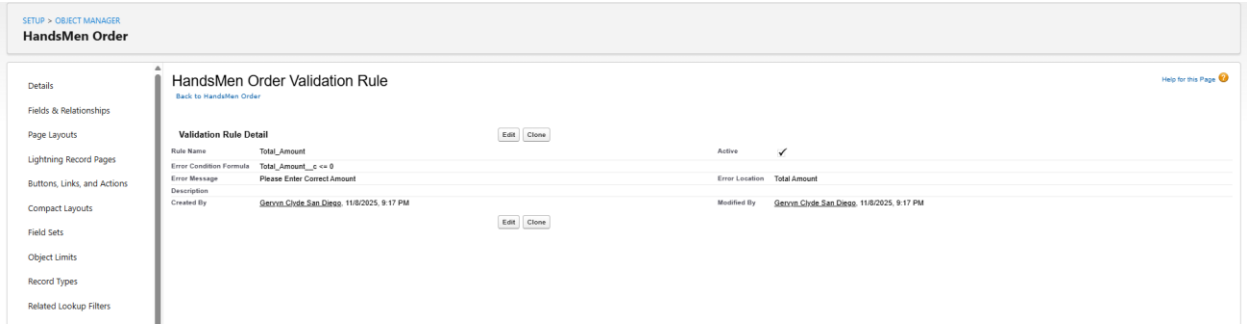
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
HandsMen Product	HandsMen_Product__c	Master-Detail(HandsMen Product)		✓
Inventory Number	Name	Auto Number		✓
Last Modified By	LastModifiedById	Lookup(User)		
Stock Quantity	Stock_Quantity__c	Number(18, 0)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

Validation Rules Created

HandsMen Order – Total Amount

- **Formula:** Total_Amount__c <= 0
- **Error:** “Please Enter Correct Amount”

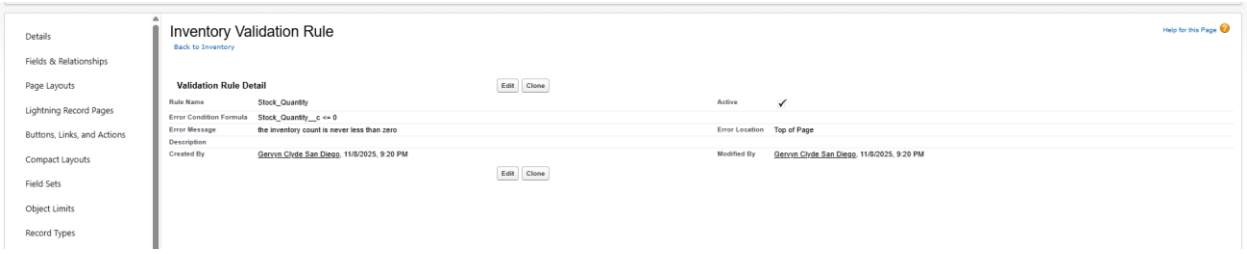
Screenshot:



Inventory – Stock Quantity

- **Formula:** Stock_Quantity__c <= 0
- **Error:** “The inventory count is never less than zero.”

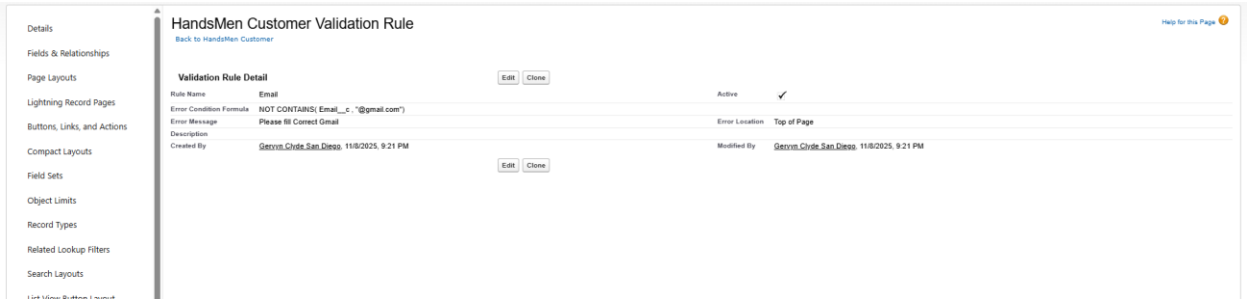
Screenshot:



HandsMen Customer – Email

- **Formula:** NOT CONTAINS(Email__c, "@gmail.com")
- **Error:** “Please fill Correct Gmail.”

Screenshot:

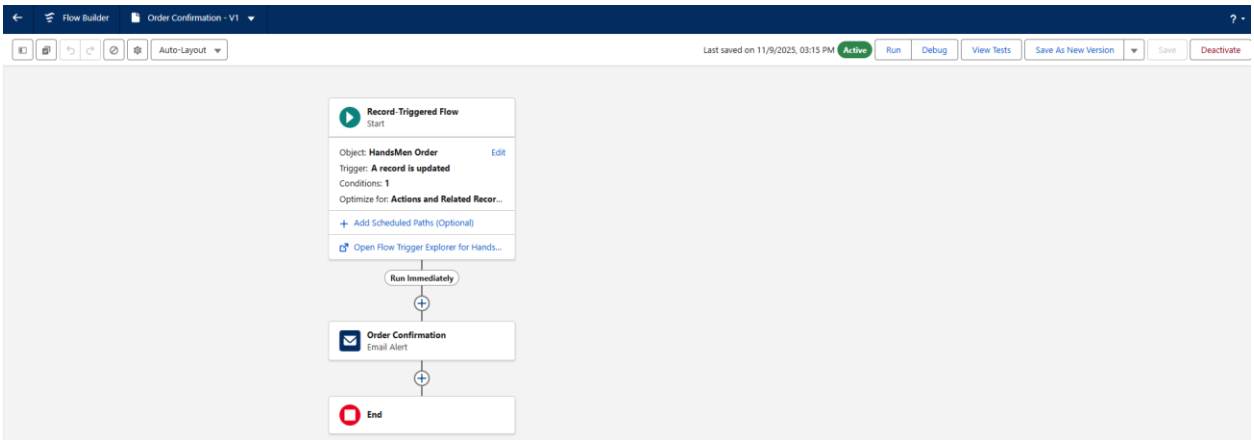


Automation (Flows)

1. Order Confirmation Email Flow

- Runs when order status becomes “Confirmed”
- Sends email to customer

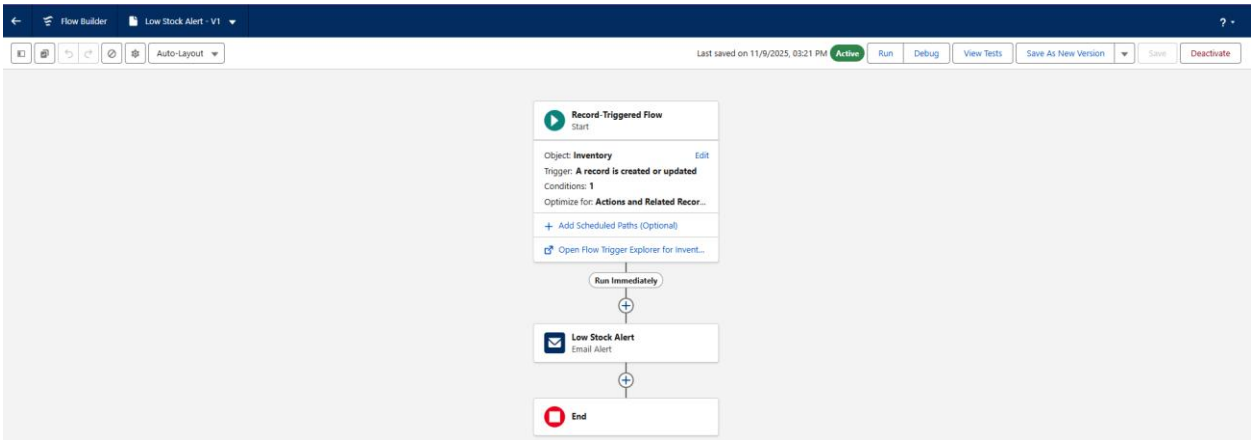
Screenshot:



2. Low Stock Alert Flow

- Runs when stock is less than 5
- Sends email to Inventory Manager

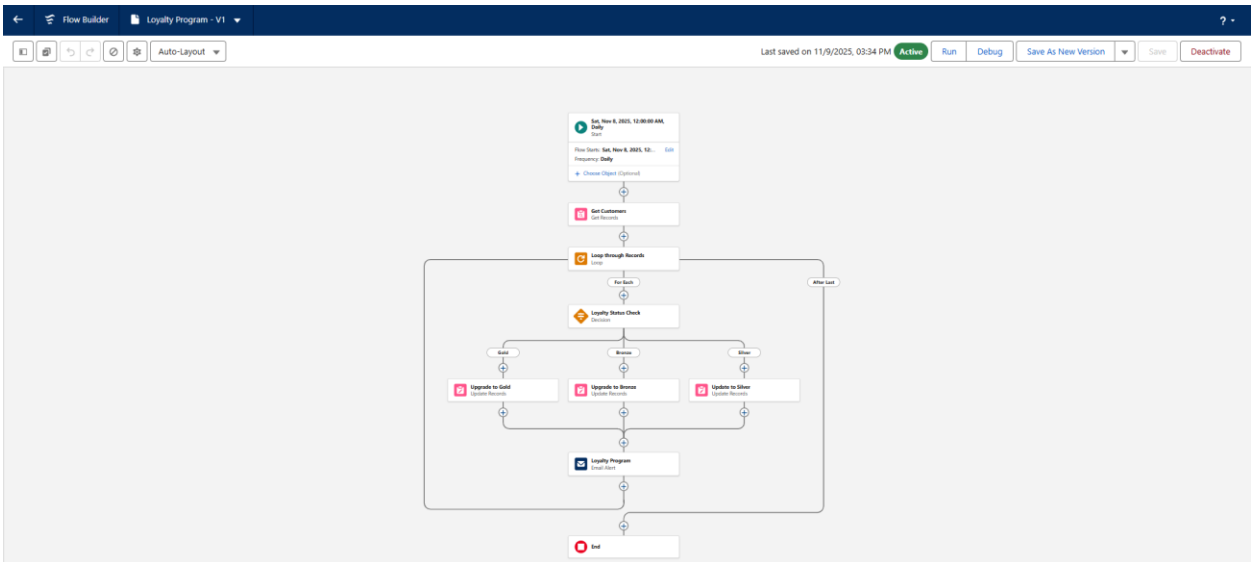
Screenshot:



3. Loyalty Program Flow

- Scheduled daily
- Updates customer level (Bronze, Silver, Gold)

Screenshot:

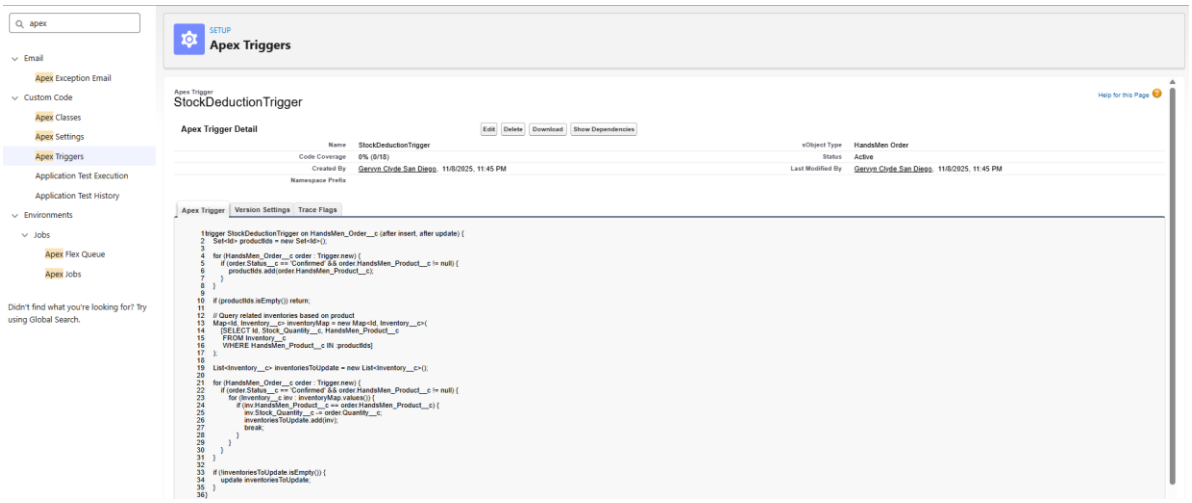


Apex Triggers:

Stock Deduction Trigger

- Deducts product stock when an order is confirmed

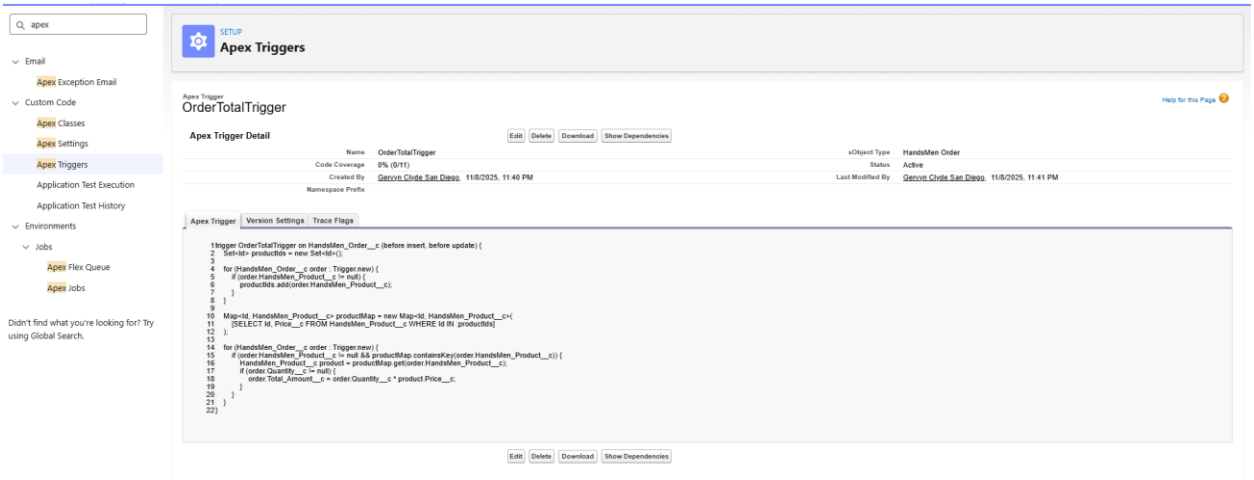
Screenshot:



Order Total Trigger

- Checks if the order quantity is valid

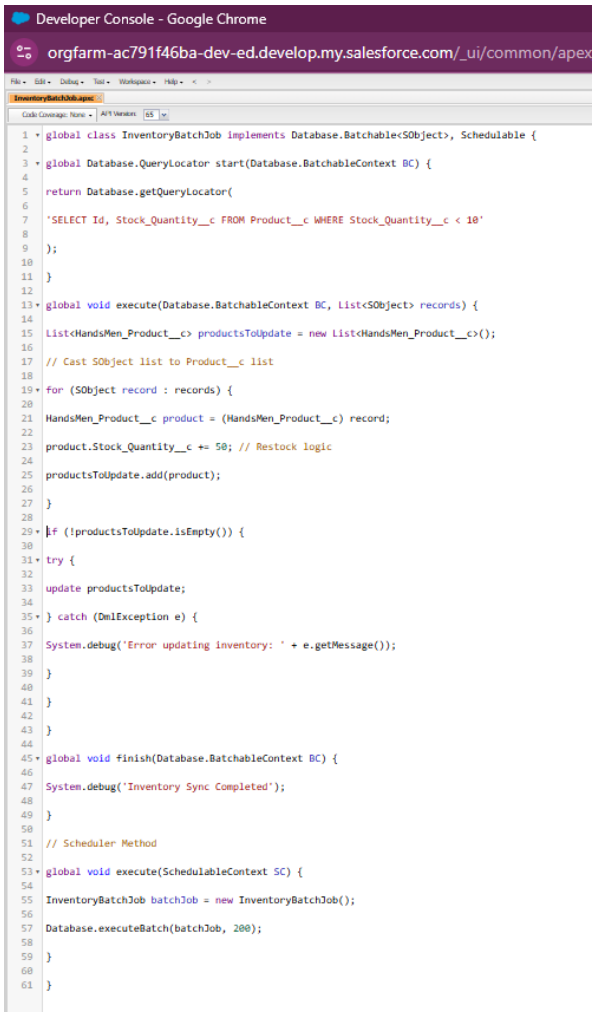
Screenshot



Scheduled Batch Job

- Runs every midnight to update inventory and financial numbers

Screenshot:



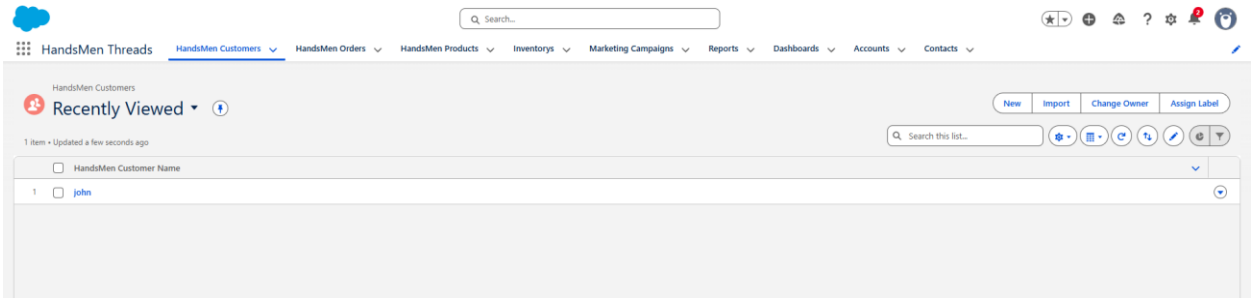
PHASE 3: UI/UX Development & Customization

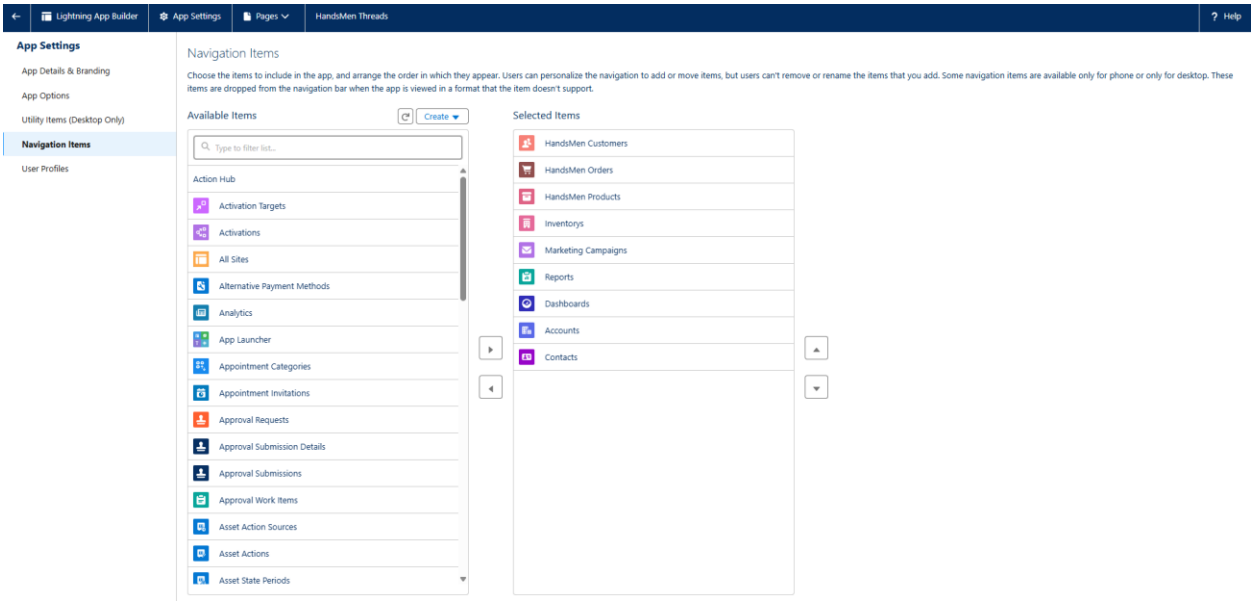
Lightning App Setup

The HandsMen Threads app includes:

- Navigation Tabs for each object
- Easy access for HandsMen Thread users

Screenshot:



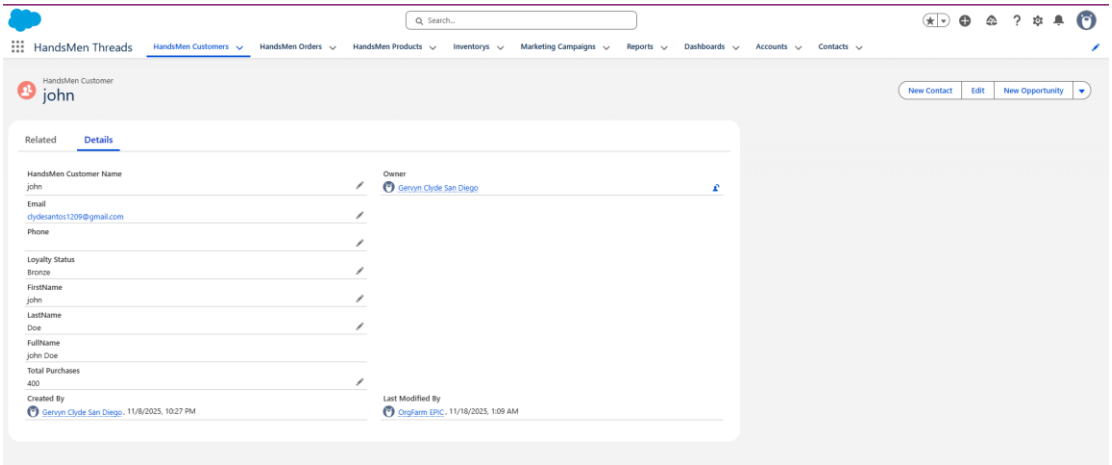


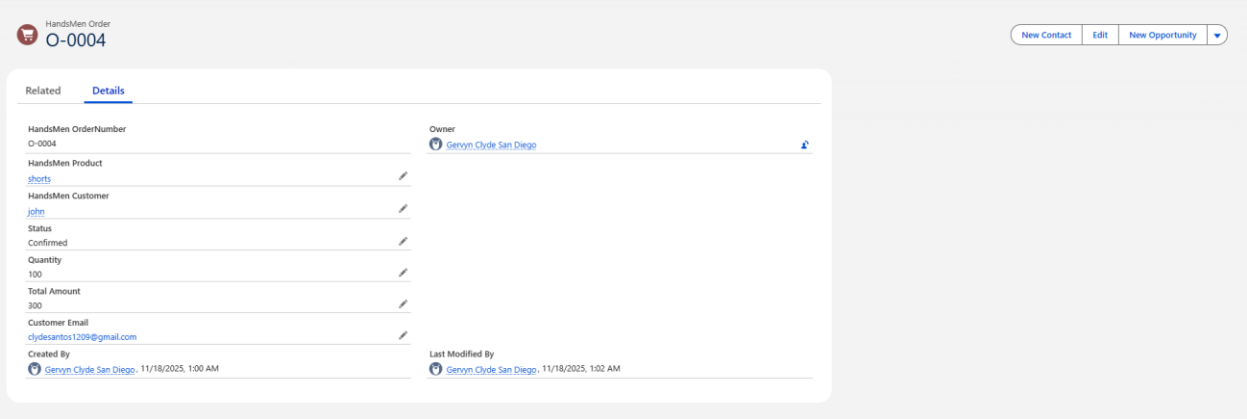
Page Layouts

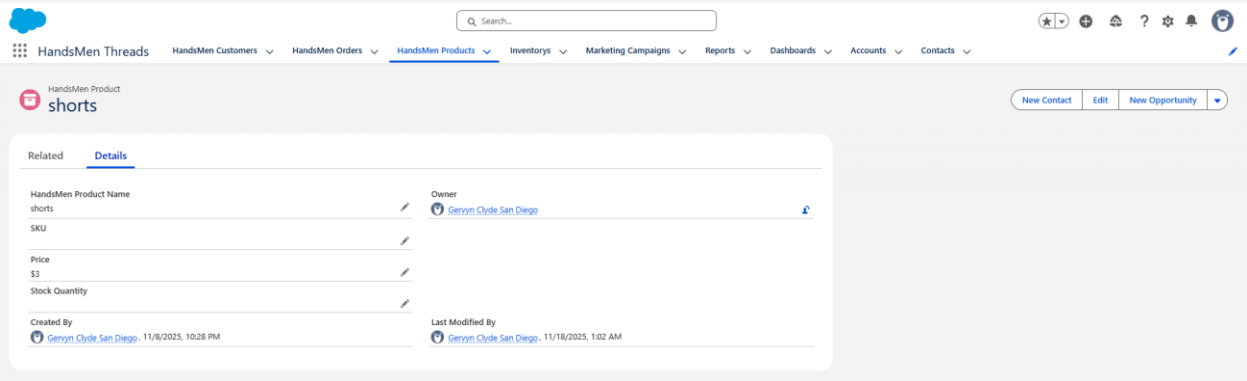
Page layouts designed for:

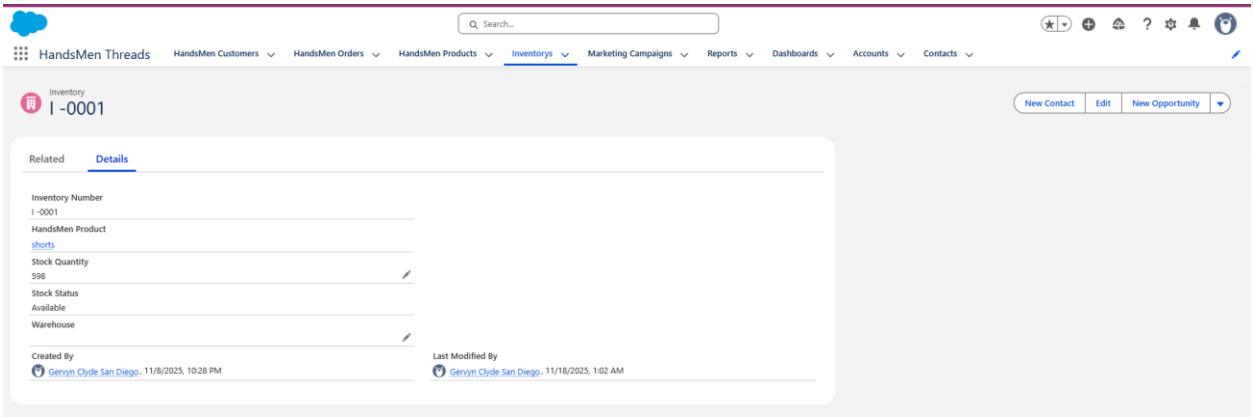
- HandsMen Customer
- HandsMen Order
- HandsMen Product
- Inventory

Screenshots:







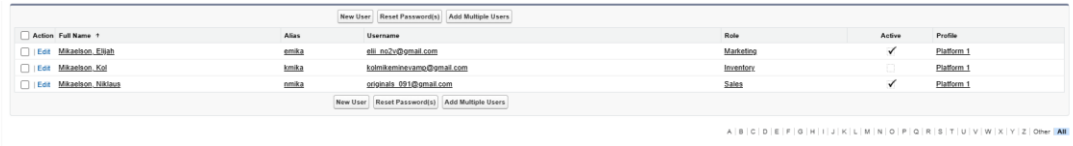


User Management

Users assigned to roles:

- Sales Manager
- Inventory Manager
- Marketing Manager

Screenshot:



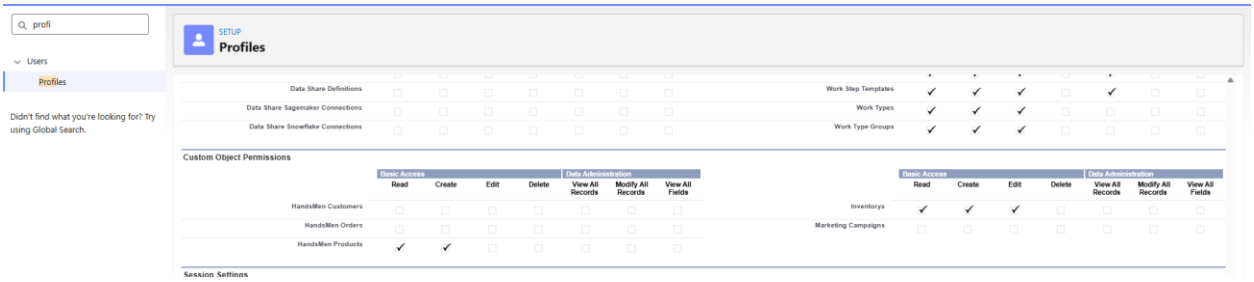
PHASE 4: Testing & Security

Security Settings:

Profiles (Platform 1)

- HandsMen Products: Read, Create
- Inventory: Read, Create, Edit

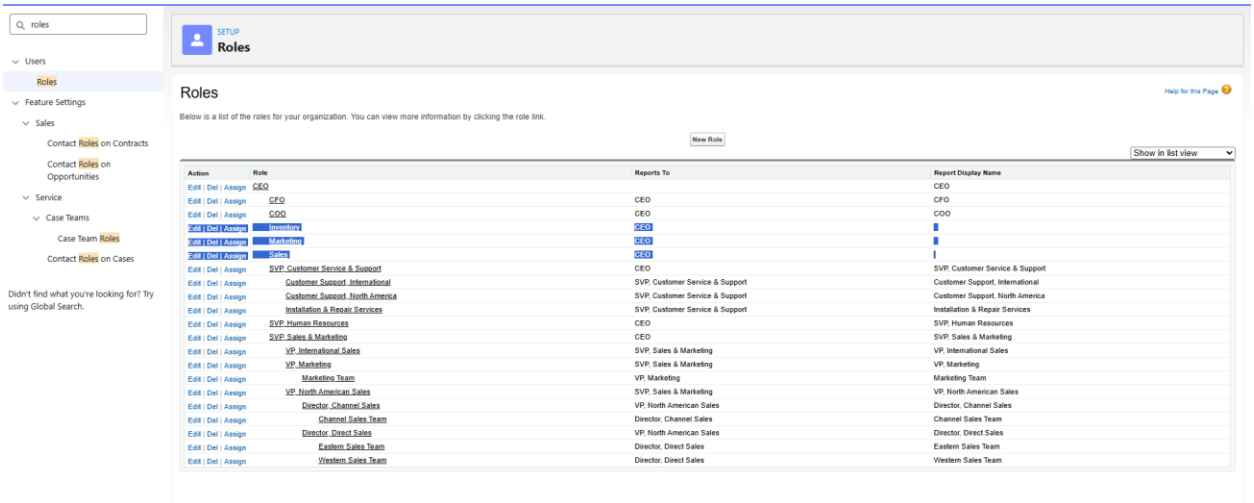
Screenshot:



Roles

- Sales Manager under CEO
- Inventory Manager under CEO
- Marketing Manager under CEO

Screenshot:

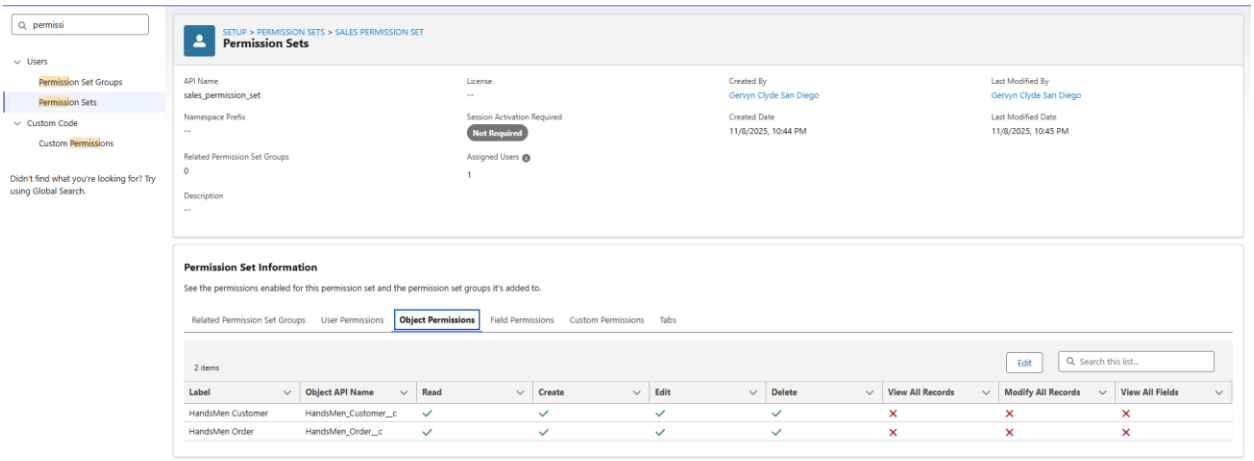


Permission Sets

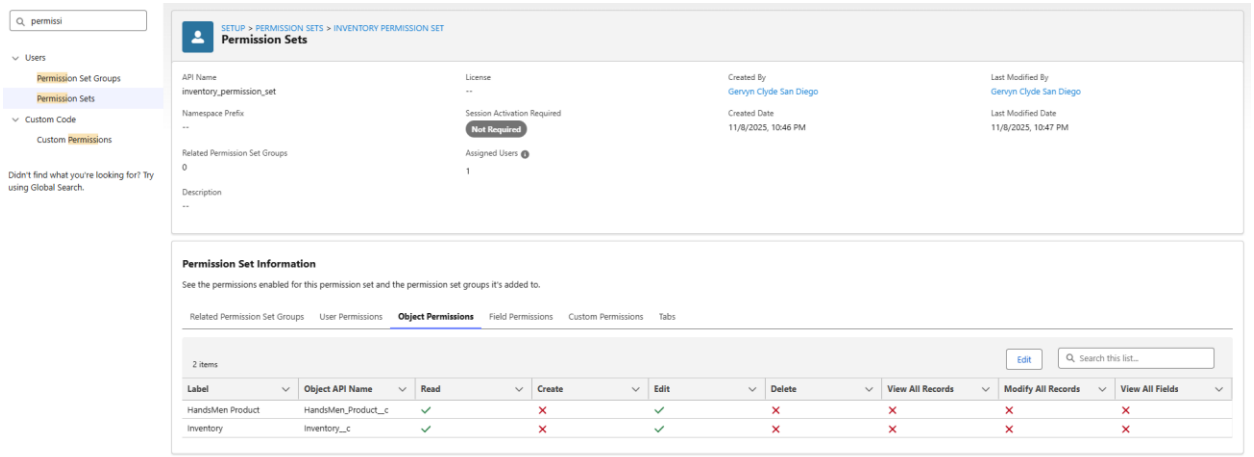
Extra permissions for specific users.

Screenshots:

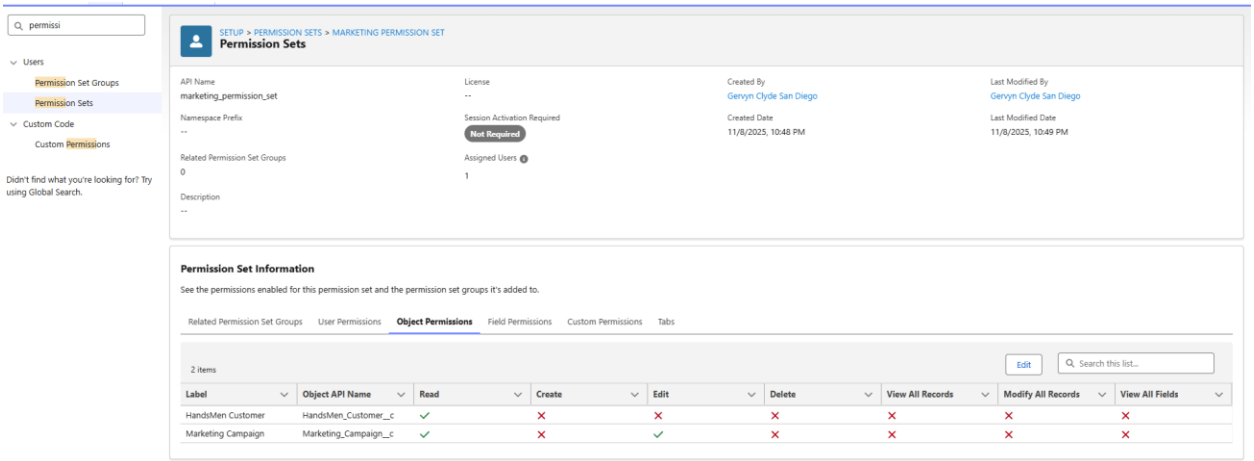
Sales:



Inventory:



Marketing:

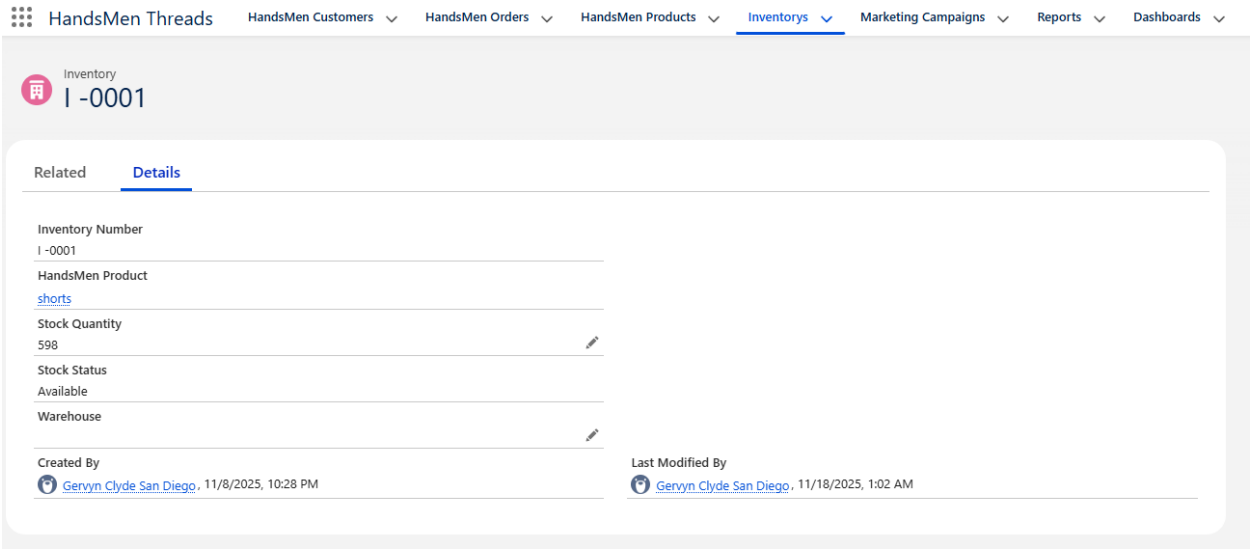


Testing

Test cases include:

- Creating orders
- Error messages from validation rules
- Flows sending emails
- Apex triggers working correctly
- Loyalty updating

Screenshots:



Search...

HandsMen Threads | HandsMen Customers | HandsMen Orders | HandsMen Products | Inventorys | Marketing Campaigns | Reports | Dashboards | Acc

HandsMen Order
O-0007

HandsMen Order "O-0007" was created.

Related | Details

HandsMen OrderNumber O-0007	Owner Gervyn Clyde San Diego
HandsMen Product shorts	
HandsMen Customer john	
Status Confirmed	
Quantity 100	
Total Amount 300	
Customer Email clydesantos1209@gmail.com	
Created By Gervyn Clyde San Diego, 11/18/2025, 2:08 AM	Last Modified By Gervyn Clyde San Diego, 11/18/2025, 2:08 AM

Inventory
I -0001

Related | Details

Inventory Number I -0001	
HandsMen Product shorts	
Stock Quantity 498	
Stock Status Available	
Warehouse	
Created By Gervyn Clyde San Diego, 11/8/2025, 10:28 PM	Last Modified By Gervyn Clyde San Diego, 11/18/2025, 2:08 AM

HandsMen Customer
john

Related | Details

HandsMen Customer Name
john

Email
clydesantos1209@gmail.com

Phone

Loyalty Status
Bronze

FirstName
john

LastName
Doe

FullName
john Doe

Total Purchases
400

Created By
Gervyn Clyde San Diego, 11/8/2025, 10:27 PM

HandsMen Customer
john

Related | Details

HandsMen Customer Name
john

Email
clydesantos1209@gmail.com

Phone

Loyalty Status
Silver

FirstName
john

LastName
Doe

FullName
john Doe

Total Purchases
800

Created By
Gervyn Clyde San Diego, 11/8/2025, 10:27 PM

in:spam

Delete forever | Not spam | 6 of 6

Your Order has been Confirmed! Spam ×

Gervyn Clyde San Diego via pztkucjbvndpwz.g5-18z8aeau.ind168.bnc.salesforce.com
to me

Sun, Nov 9, 3:20 PM (9 days ago)

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

Report not spam

Dear john,

Your order #O-0001 has been confirmed!

Thank you for shopping with us.

Best Regards,

Sales Team

Delete forever | Not spam | 5 of 6

Low Stock Alert Email Spam ×

Gervyn Clyde San Diego via 6lxxfegpkzu67v.g5-18z8aeau.ind168.bnc.salesforce.com
to me

Sun, Nov 9, 3:22 PM (9 days ago)

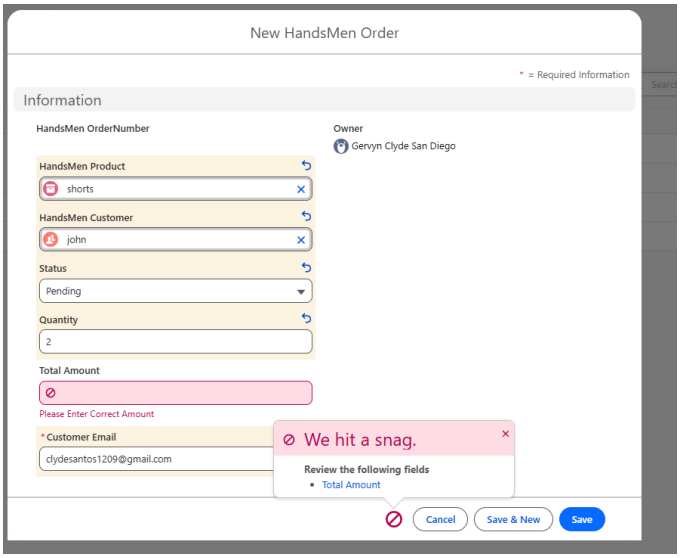
Why is this message in spam? This message is similar to messages that were identified as spam in the past.

Report not spam

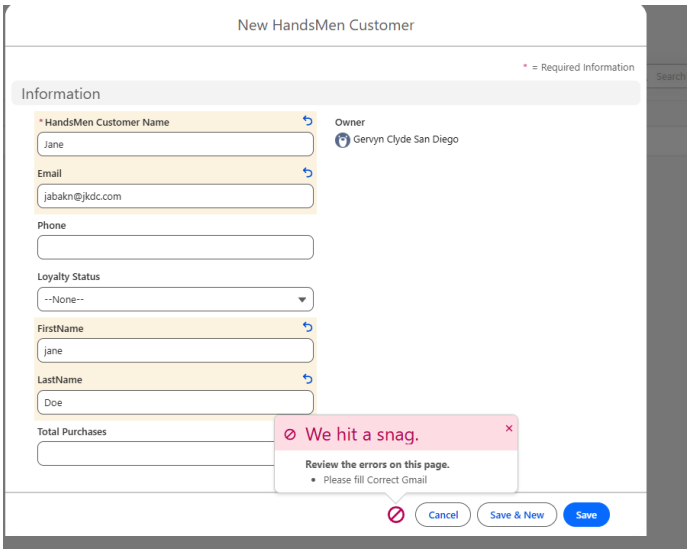
Dear Inventory Manager,
This is to inform you that the stock for the following product is running low:
Product Name: shorts
Current Stock Quantity: 4
Please take the necessary steps to restock this item immediately.
Best Regards,
Inventory Monitoring System

Reply | Forward

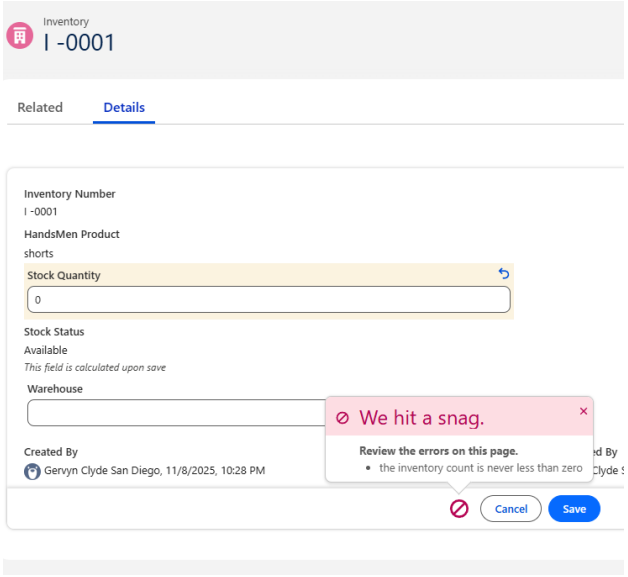
Order:



Customer:



Inventory:



PHASE 5: Deployment, Documentation & Maintenance

Deployment

- Used Change Sets
- Validated components
- Tested everything after deployment

Maintenance

- Monitor using Debug Logs
- Review flow performance
- Optimize Apex and automation
- Backup data monthly

Troubleshooting Tips

- Check debug logs
- Confirm user permissions
- Check if flows failed
- Check Apex governor limits

Conclusion

The Salesforce system for HandsMen Threads improves customer service, order handling, inventory updates, and promotions. Data is structured, automation is working, and the interface is easy to use. This system supports the company's growth and provides a smooth digital process for the premium fashion business.

Future Enhancements

- AI-based outfit suggestions
- Chatbot for customer questions
- Predictive stock updates
- Points-based loyalty rewards
- Advanced reports with Einstein Analytics