

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

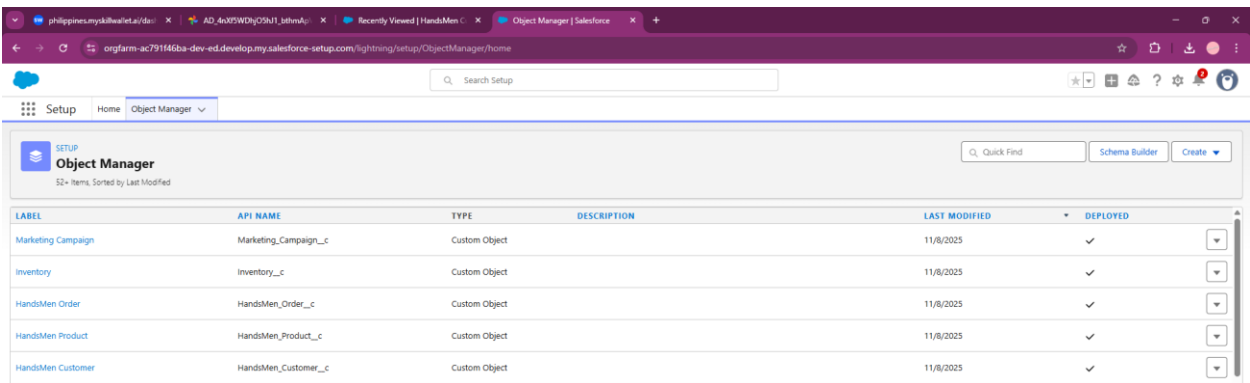
Environment Setup: Special Configuration Trailhead Playground

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:



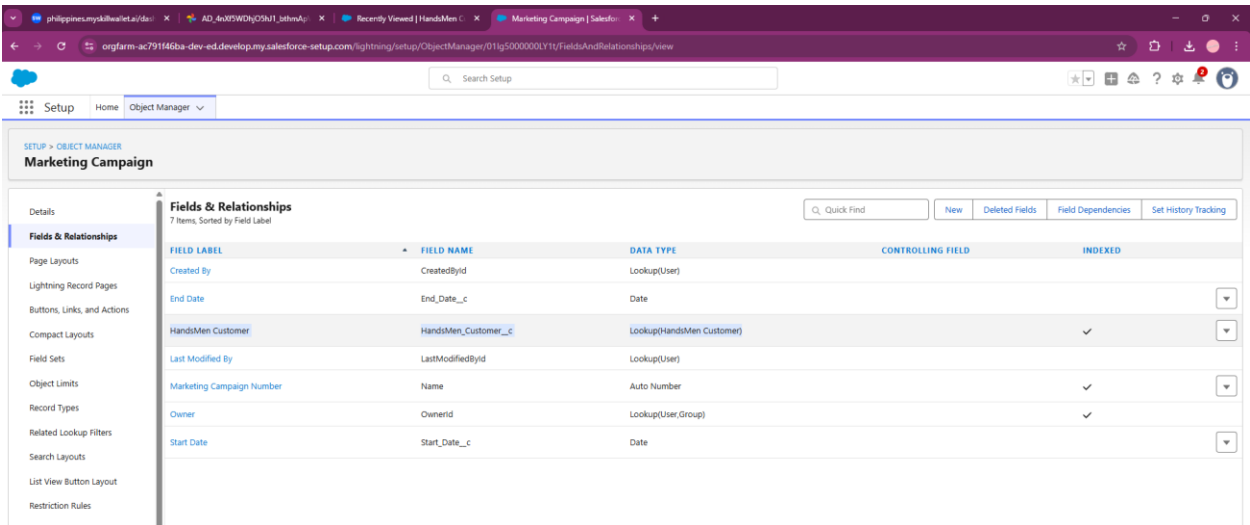
The screenshot shows the Salesforce Object Manager interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. Below this, a header section displays 'Object Manager' with a sub-header '52+ Items, Sorted by Last Modified'. A search bar and 'Schema Builder' and 'Create' buttons are also present. The main content area is a table listing custom objects.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Marketing Campaign	Marketing_Campaign__c	Custom Object		11/8/2025	✓
Inventory	Inventory__c	Custom Object		11/8/2025	✓
HandsMen Order	HandsMen_Order__c	Custom Object		11/8/2025	✓
HandsMen Product	HandsMen_Product__c	Custom Object		11/8/2025	✓
HandsMen Customer	HandsMen_Customer__c	Custom Object		11/8/2025	✓

Relationships

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

Screenshots:



The screenshot shows the 'Fields & Relationships' page for the 'Marketing Campaign' object. The left sidebar contains a navigation menu with options like 'Details', 'Fields & Relationships', 'Page Layouts', etc. The main area is titled 'Fields & Relationships' and shows a table of fields. A search bar and buttons for 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking' are at the top right of the table.

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		

Validation Rules Created

HandsMen Order – Total Amount

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

Screenshot:

The screenshot shows the 'HandsMen Order Validation Rule' configuration page in Salesforce. The left sidebar contains navigation links: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'HandsMen Order Validation Rule' and includes a 'Back to HandsMen Order' link. Below the title is the 'Validation Rule Detail' section, which contains the following information:

Field	Value
Rule Name	Total_Amount
Error Condition Formula	Total_Amount__c <= 0
Error Message	Please Enter Correct Amount
Error Location	Total Amount
Description	
Created By	Gervyn Clyde San Diego
Created Date	11/8/2025, 9:17 PM
Modified By	Gervyn Clyde San Diego
Modified Date	11/8/2025, 9:17 PM

Buttons for 'Edit' and 'Clone' are visible next to the rule name and the 'Created By' field. The 'Active' status is indicated by a checkmark.

Inventory – Stock Quantity

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

Screenshot:

The screenshot shows the 'Inventory Validation Rule' configuration page in Salesforce. The left sidebar contains navigation links: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Inventory Validation Rule' and includes a 'Back to Inventory' link. Below the title is the 'Validation Rule Detail' section, which contains the following information:

Field	Value
Rule Name	Stock_Quantity
Error Condition Formula	Stock_Quantity__c <= 0
Error Message	The inventory count is never less than zero
Error Location	Top of Page
Description	
Created By	Gervyn Clyde San Diego
Created Date	11/8/2025, 9:20 PM
Modified By	Gervyn Clyde San Diego
Modified Date	11/8/2025, 9:20 PM

Buttons for 'Edit' and 'Clone' are visible next to the rule name and the 'Created By' field. The 'Active' status is indicated by a checkmark.

HandsMen Customer – Email

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

Screenshot:

The screenshot shows the 'HandsMen Customer Validation Rule' configuration page in Salesforce. The left sidebar contains navigation links: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'HandsMen Customer Validation Rule' and includes a 'Back to HandsMen Customer' link. Below the title is the 'Validation Rule Detail' section, which contains the following information:

Field	Value
Rule Name	Email
Error Condition Formula	NOT CONTAINS(Email__c, "@gmail.com")
Error Message	Please fill Correct Gmail
Error Location	Top of Page
Description	
Created By	Gervyn Clyde San Diego
Created Date	11/8/2025, 9:21 PM
Modified By	Gervyn Clyde San Diego
Modified Date	11/8/2025, 9:21 PM

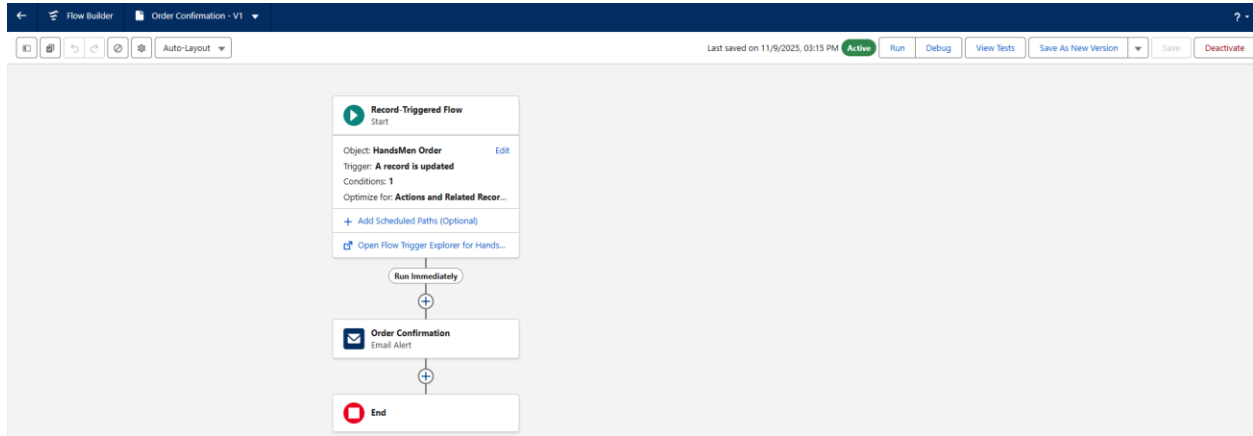
Buttons for 'Edit' and 'Clone' are visible next to the rule name and the 'Created By' field. The 'Active' status is indicated by a checkmark.

Automation (Flows)

1. Order Confirmation Email Flow

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

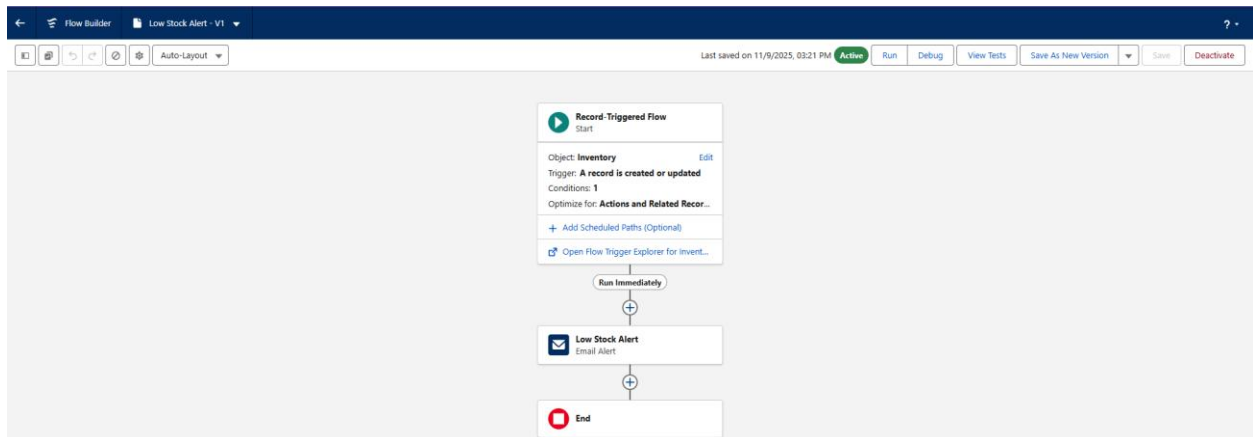
Screenshot:



2. Low Stock Alert Flow

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

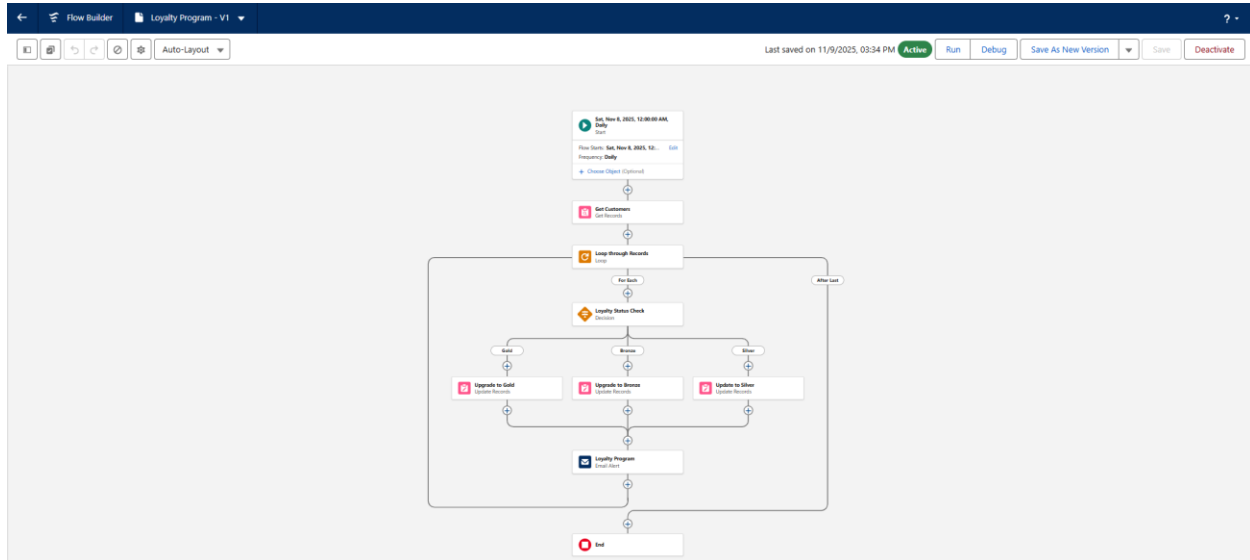
Screenshot:



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

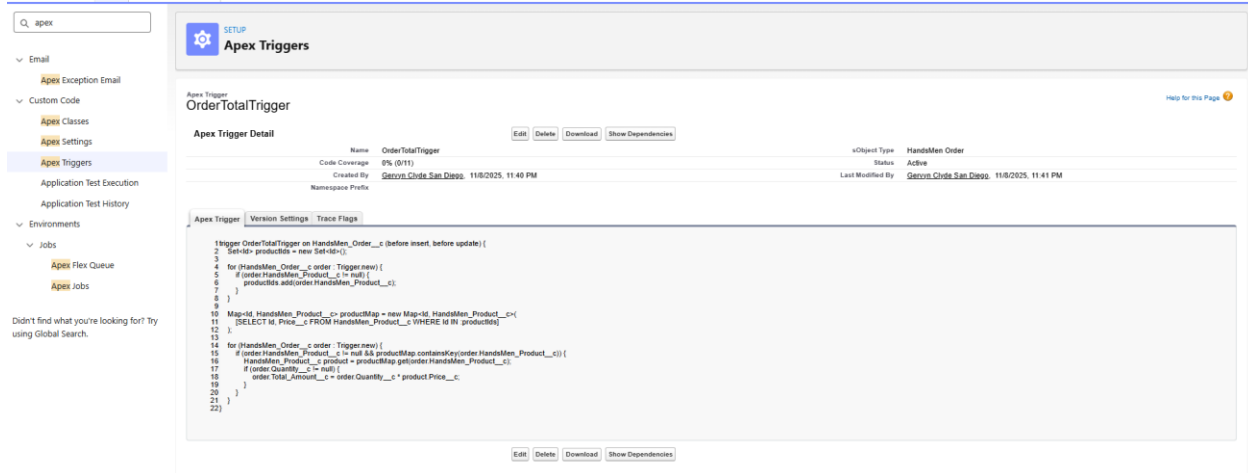
Screenshot:

The screenshot shows the Salesforce Apex Triggers page. On the left, there is a sidebar with navigation options: Email, Custom Code, Apex Classes, Apex Settings, Apex Triggers (selected), Application Test Execution, Application Test History, Environments, Jobs, Apex Flex Queue, and Apex Jobs. The main content area displays the details for the 'StockDeductionTrigger' Apex Trigger. The trigger is named 'StockDeductionTrigger' and is associated with the 'Handshakes Order' object type. It was created by 'Geron.Chris.San.Diego' on 11/9/2025 at 11:45 PM. The trigger is currently in 'Active' status. Below the details, there is a section for the trigger's code, which includes a 'Trigger StockDeductionTrigger on Handshakes_Order__c (after insert, after update)' and a 'Set of products' variable. The code logic involves querying related inventories, calculating stock quantities, and updating the inventory levels based on the order status and product details.

Order Total Trigger

- Checks if the order quantity is valid

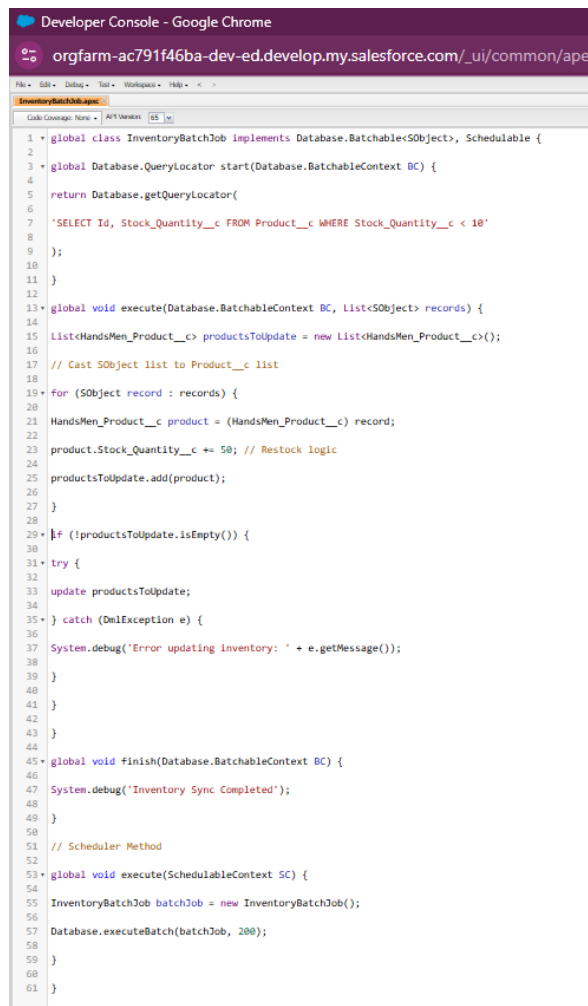
Screenshot



Scheduled Batch Job

- Runs every midnight to update inventory and financial numbers

Screenshot:



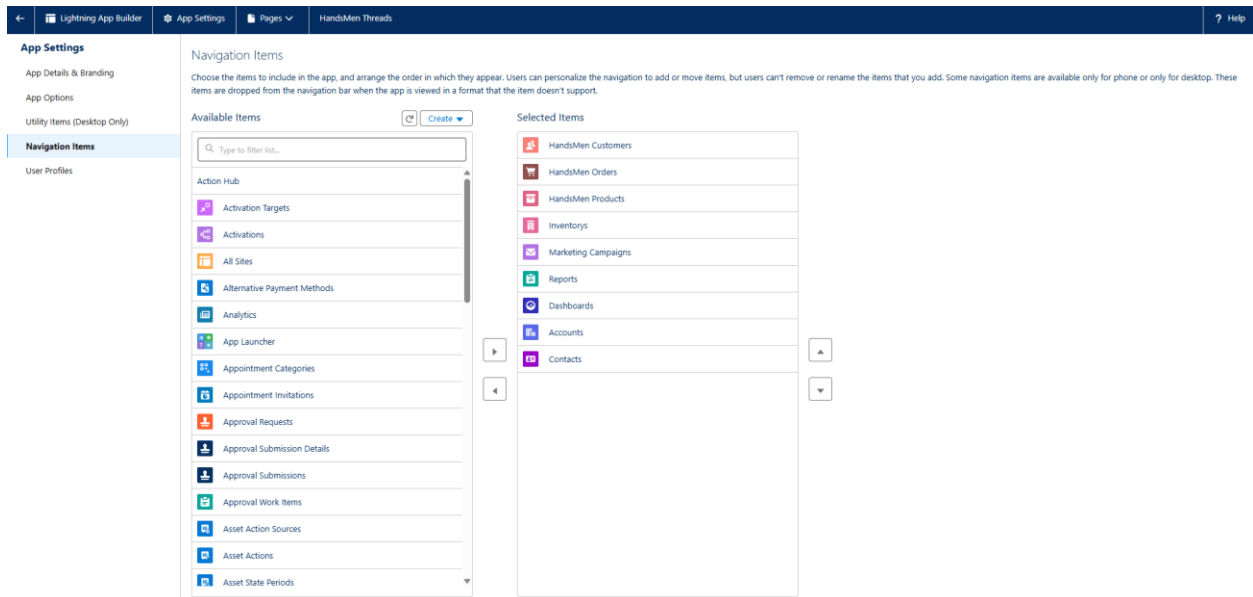
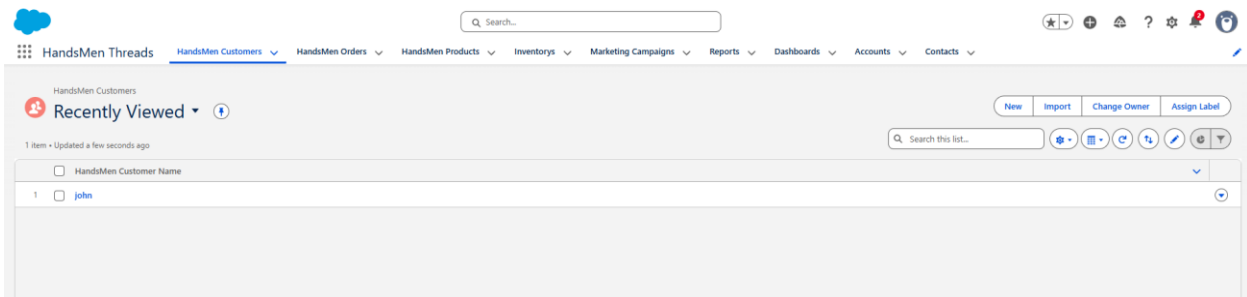
PHASE 3: UI/UX Development & Customization

Lightning App Setup

The HandsMen Threads app includes:

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

Screenshot:

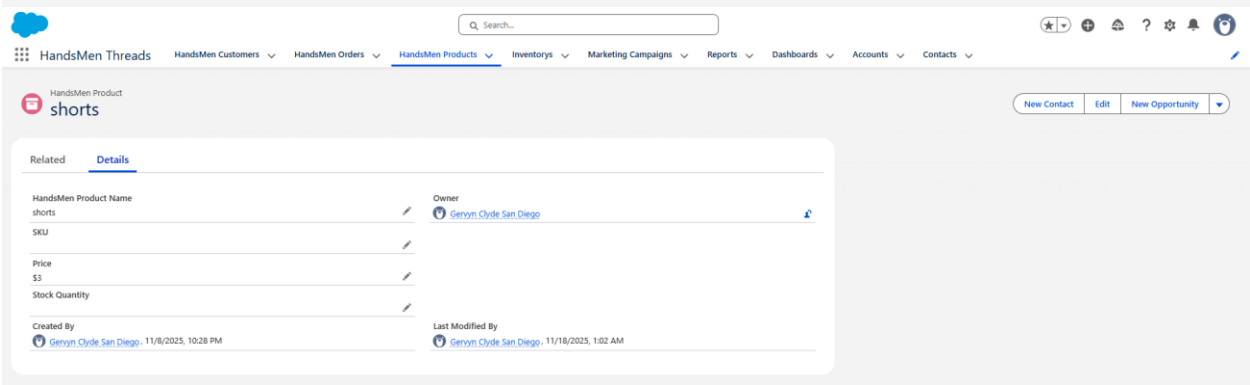
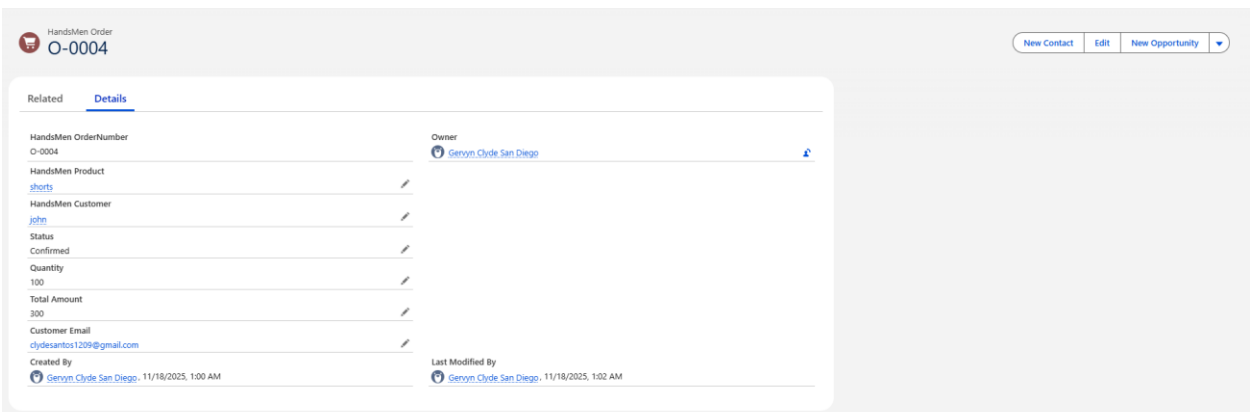
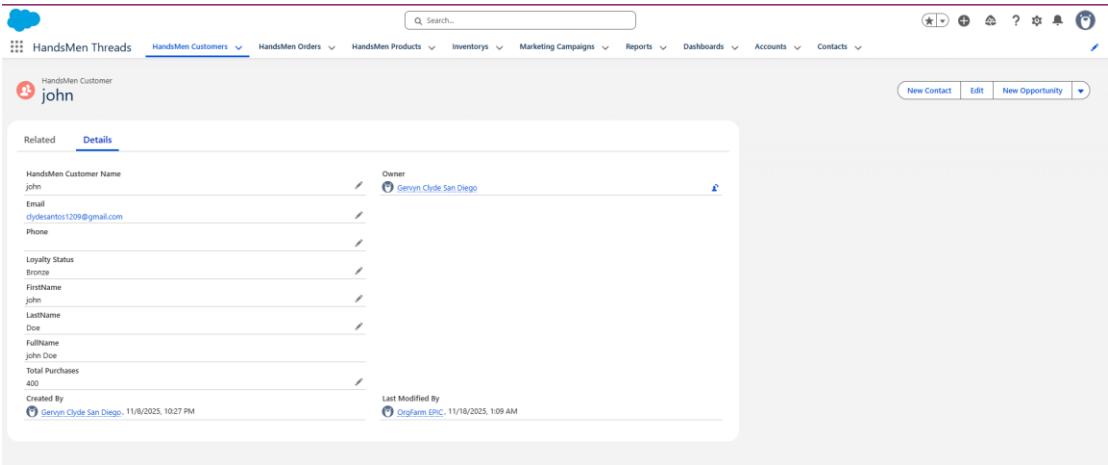


Page Layouts

Page layouts designed for:

- HandsMen Customer
- HandsMen Order
- HandsMen Product
- Inventory

Screenshots:



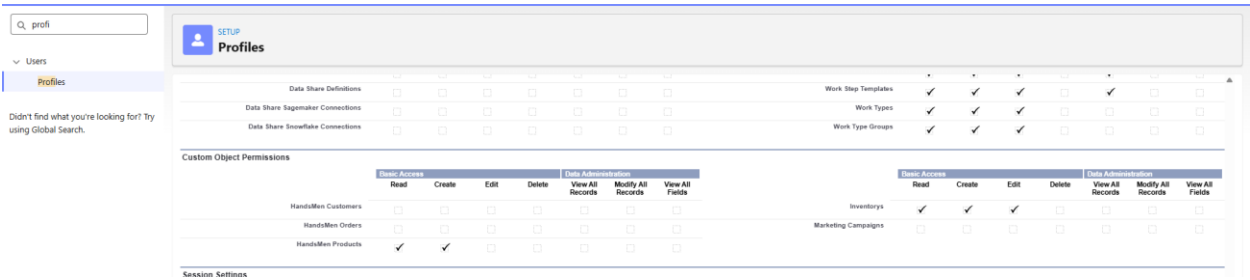
PHASE 4: Testing & Security

Security Settings:

Profiles (Platform 1)

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

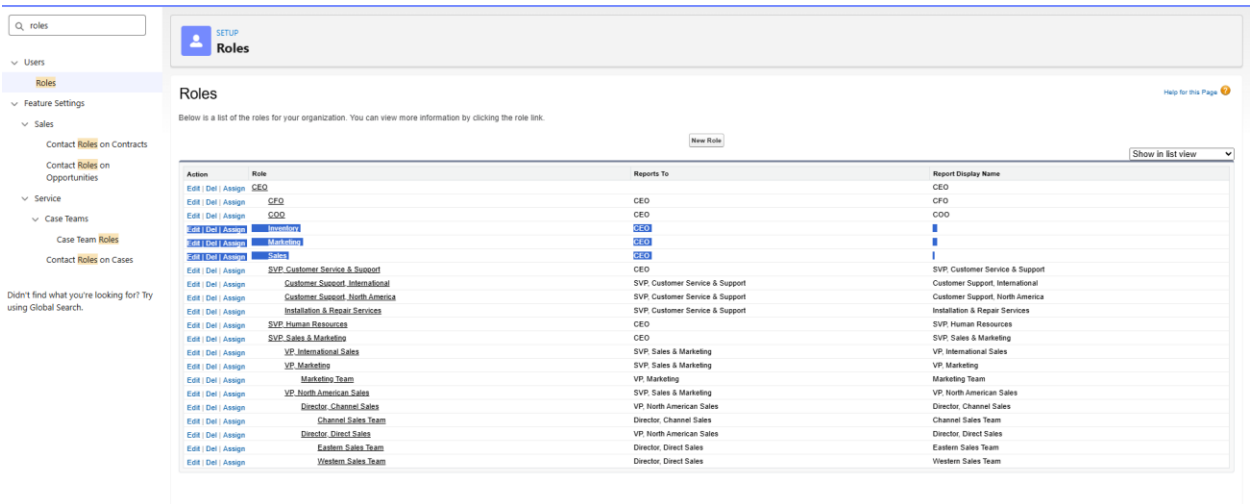
Screenshot:



Roles

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

Screenshot:



Permission Sets

Extra permissions for specific users.

Screenshots:

Sales:

Q permissi

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

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

SETUP > PERMISSION SETS > SALES PERMISSION SET

Permission Sets

API Name

sales_permission_set

License

--

Created By

Gervyn Clyde San Diego

Last Modified By

Gervyn Clyde San Diego

Namespace Prefix

--

Session Activation Required

Not Required

Created Date

11/8/2025, 10:44 PM

Last Modified Date

11/8/2025, 10:45 PM

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

Edit

Q Search this list...

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	✓	✓	✓	✓	✗	✗	✗

Inventory:

Q permissi

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

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

SETUP > PERMISSION SETS > INVENTORY PERMISSION SET

Permission Sets

API Name

inventory_permission_set

License

--

Created By

Gervyn Clyde San Diego

Last Modified By

Gervyn Clyde San Diego

Namespace Prefix

--

Session Activation Required

Not Required

Created Date

11/8/2025, 10:46 PM

Last Modified Date

11/8/2025, 10:47 PM

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

Edit

Q Search this list...

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	✓	✗	✓	✗	✗	✗	✗

Marketing:

Q permissi

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

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

SETUP > PERMISSION SETS > MARKETING PERMISSION SET

Permission Sets

API Name

marketing_permission_set

License

--

Created By

Gervyn Clyde San Diego

Last Modified By

Gervyn Clyde San Diego

Namespace Prefix

--

Session Activation Required

Not Required

Created Date

11/8/2025, 10:48 PM

Last Modified Date

11/8/2025, 10:49 PM

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

Edit

Q Search this list...

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	✓	✗	✓	✗	✗	✗	✗

Testing

Test cases include:

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

Screenshots:

The screenshot shows the 'Inventory' section of the 'HandsMen Threads' application. The navigation bar at the top includes 'HandsMen Threads', 'HandsMen Customers', 'HandsMen Orders', 'HandsMen Products', 'Inventorys' (selected), 'Marketing Campaigns', 'Reports', and 'Dashboards'. The main content area displays the 'Inventory' details for 'I -0001'. The 'Details' tab is active, showing fields for 'Inventory Number', 'HandsMen Product', 'Stock Quantity', 'Stock Status', and 'Warehouse'. The 'Inventory Number' is 'I -0001', the 'HandsMen Product' is 'shorts', the 'Stock Quantity' is '598', the 'Stock Status' is 'Available', and the 'Warehouse' is empty. The 'Created By' field shows 'Gervyn Clyde San Diego' on 11/8/2025 at 10:28 PM, and the 'Last Modified By' field shows 'Gervyn Clyde San Diego' on 11/18/2025 at 1:02 AM.

Related	Details
Inventory	
I -0001	
HandsMen Product	
shorts	
Stock Quantity	598
Stock Status	Available
Warehouse	
Created By	Last Modified By
Gervyn Clyde San Diego , 11/8/2025, 10:28 PM	Gervyn Clyde San Diego , 11/18/2025, 1:02 AM



HandsMen Threads

HandsMen Customers

HandsMen Orders

HandsMen Products

Inventories

Marketing Campaigns

Reports

Dashboards

Acc

Search...



HandsMen Order
O-0007

HandsMen Order "O-0007" was created.

Related Details

HandsMen OrderNumber

O-0007

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

Owner

[Gervyn Clyde San Diego](#)

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](#), 11/18/2025, 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

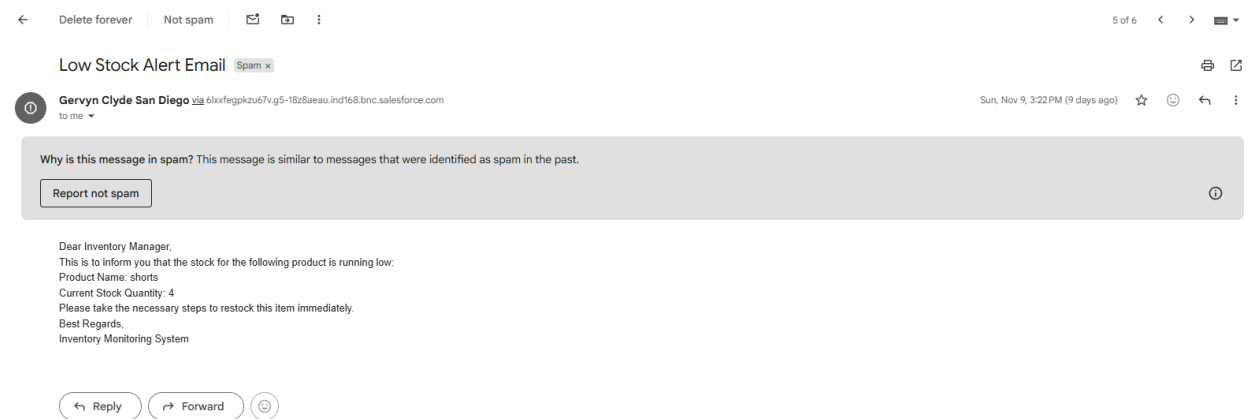
john Doe

Total Purchases

800

Created By

[Gervyn Clyde San Diego](#), 11/8/2025, 10:27 PM



Order:

New HandsMen Order

* = Required Information

Information

HandsMen OrderNumber

Owner

HandsMen Product

HandsMen Customer

Status

Quantity

Total Amount

* Customer Email

Gervyn Clyde San Diego

shorts

john

Pending

2

clydesantos1209@gmail.com

We hit a snag.

Review the following fields

Total Amount

Cancel

Save & New

Save

Customer:

New HandsMen Customer

* = Required Information

Information

* HandsMen Customer Name

Email

Phone

Loyalty Status

FirstName

LastName

Total Purchases

Jane

jabakn@jkdc.com

--None--

jane

Doe

We hit a snag.

Review the errors on this page.

Please fill Correct Gmail

Cancel

Save & New

Save

Inventory:

Inventory

I -0001

Related

Details

Inventory Number

HandsMen Product

Stock Quantity

Stock Status

Warehouse

Created By

We hit a snag.

Review the errors on this page.

the inventory count is never less than zero

Cancel

Save

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