

# HandsMen Threads Salesforce CRM Project Documentation

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## Overview

HandsMen Threads is a growing men's fashion brand aiming to modernize its operations and enhance customer experience. To achieve this, the company implemented Salesforce CRM to centralize data, automate key processes, and provide actionable insights. The system supports order processing, inventory management, loyalty tracking, automated communication, and reporting, helping the business run more efficiently and prepare for future growth.

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## Objectives

The Salesforce CRM was built with the following goals:

- **Customer Management:** Maintain accurate and complete customer records.
  - **Automation:** Automatically send order confirmations, update loyalty statuses, and notify staff of low-stock items.
  - **Inventory Monitoring:** Track stock in real-time to avoid shortages.
  - **Loyalty Program:** Reward repeat customers automatically.
  - **Data Accuracy:** Use validation rules and duplicate prevention for clean data.
  - **Analytics & Reporting:** Provide dashboards and reports for management insights.
  - **Security & Access Control:** Assign roles, profiles, and permissions to protect sensitive information.
  - **Scalability:** Support future business growth with flexible workflows and automation.
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# Phase 1: Requirement Analysis & Planning

## 1. Understanding Business Needs:

- Manual processes caused delays in order confirmations and loyalty updates.
- Inventory monitoring was inconsistent, leading to stockouts or overstock.
- Reporting was fragmented, making it difficult for management to analyze sales trends.
- Duplicate or inaccurate records caused operational inefficiencies.

## 2. Scope Definition:

**In Scope:** Custom objects, fields, validation rules, automation flows, email alerts, loyalty tracking, Lightning App setup, reports and dashboards, role-based access, testing, documentation, and demo video.

**Out of Scope:** Integration with e-commerce platforms, POS/warehouse systems, and payment gateway APIs.

## 3. Data Model & Security:

- Custom objects: Customer, Product, Inventory, Order, Order Item, Payment, Loyalty Log.
- Relationships: Customer → Orders, Orders → Order Items, Product → Inventory/Order Items, Order → Payment.
- Security: Profiles for Admin, Sales, Warehouse, Finance; permission sets for sensitive data; role hierarchy to ensure proper visibility.

## 4. Stakeholders:

Business Owner, Sales Team, Warehouse Team, Finance Team, System Administrator, Customers.

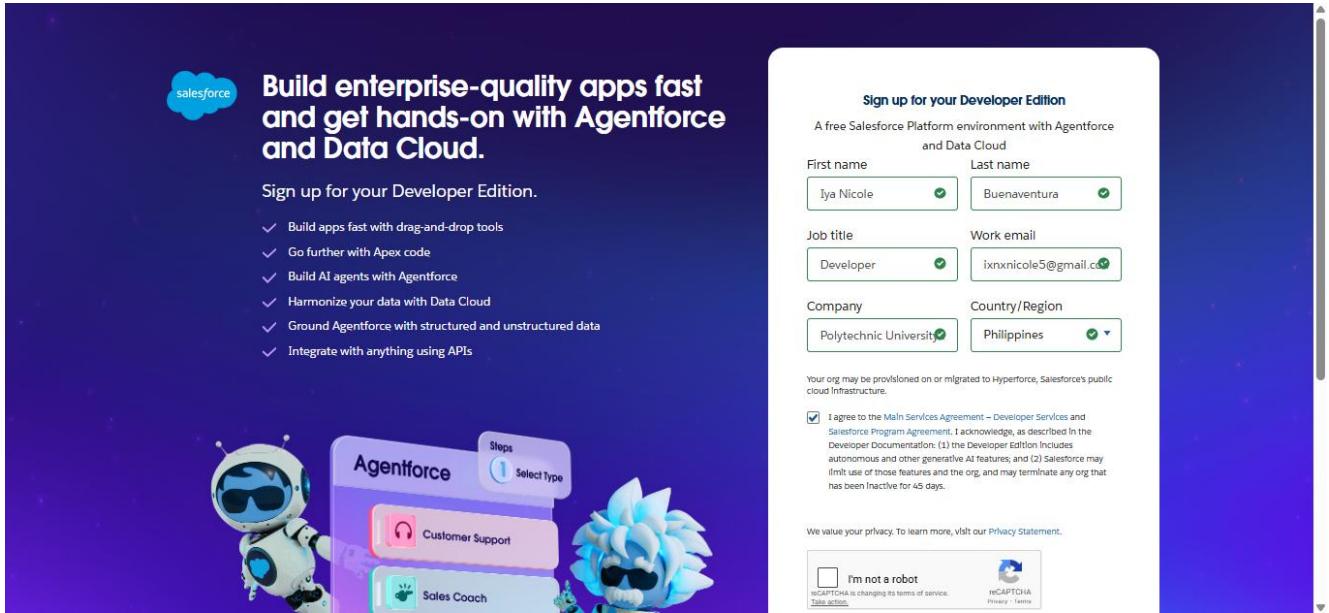
## 5. Execution Roadmap:

Requirement gathering → Data modeling → Backend automation → UI setup → Reports & dashboards → Data migration & testing → Deployment → Documentation & demo video.

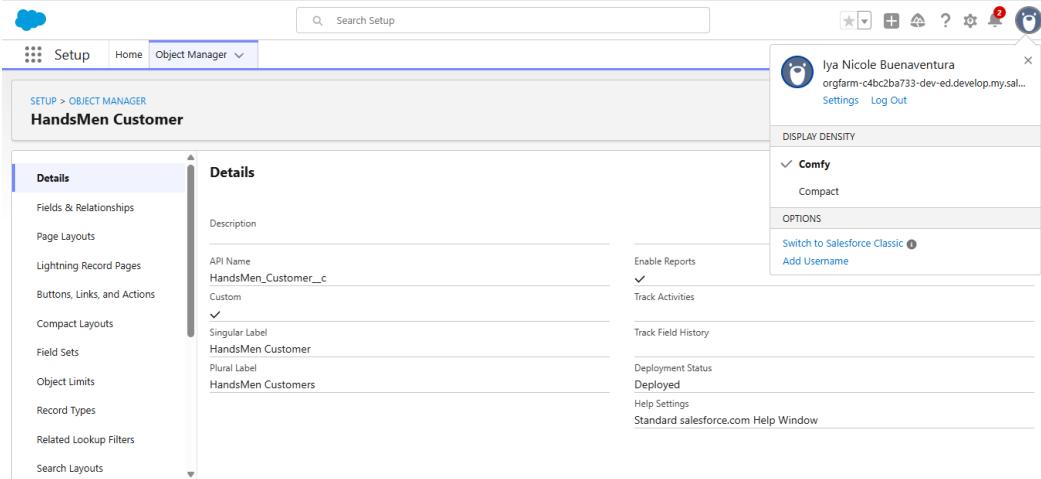
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## Phase 2: Salesforce Development – Backend & Configurations

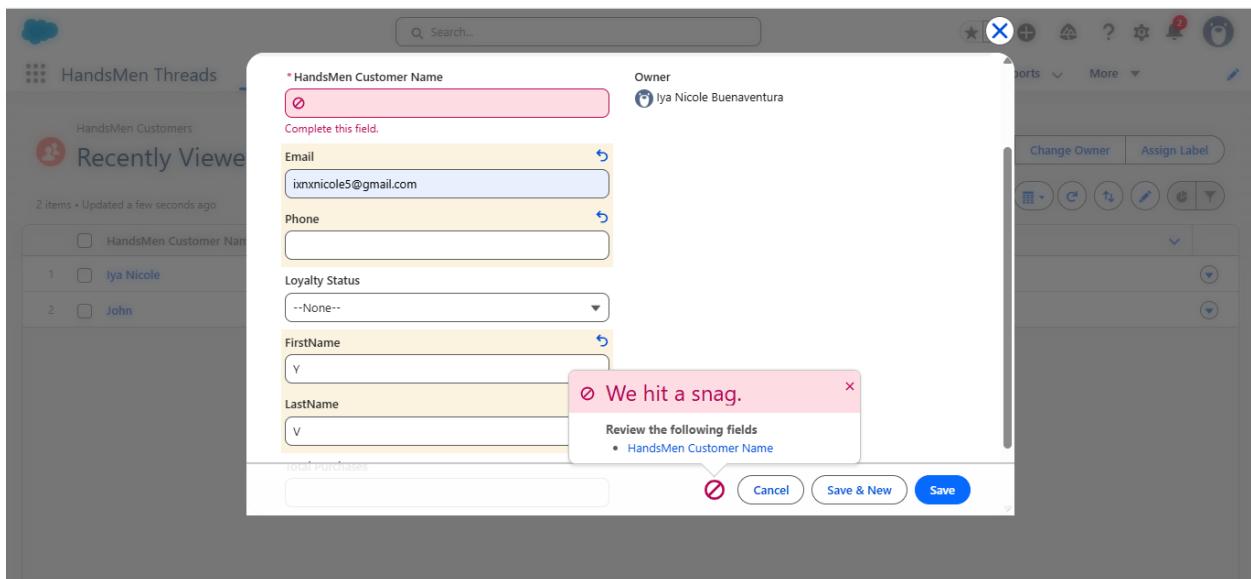
- **Environment Setup:** Developer org and sandbox created; change sets prepared for deployment.



- **Objects & Fields:** Custom fields for loyalty tier, product price, inventory quantity, order status, payment details.



- **Validation Rules:** Prevent orders if stock is insufficient; mandatory field enforcement; payment amount validation.



User Edit

Save Save & New Cancel

**General Information**

First Name: Niklaus  
 Last Name: Mikaelson  
 Alias: nmika  
 Email: ixnxnicole5@gmail.com  
 Username: ixnxnicoleee@gmail.com  
 Nickname: User1764954897875159298  
 Title:  
 Company:  
 Department:  
 Division:

Role: Sales  
 User License: Salesforce  
 Profile: Platform 1  
 Active:   
 Marketing User:   
 Offline User:   
 Knowledge User:   
 Flow User:   
 Service Cloud User:   
 Site.com Contributor User:   
 Site.com Publisher User:   
 WDC User:   
 Data.com User Type: -None--  
 Data.com Monthly Addition Limit: 300

Required Information

- **Automation Flows:**
  - Record-triggered flows: order confirmation emails, loyalty tier updates, low-stock alerts.

SETUP

Classic Email Templates

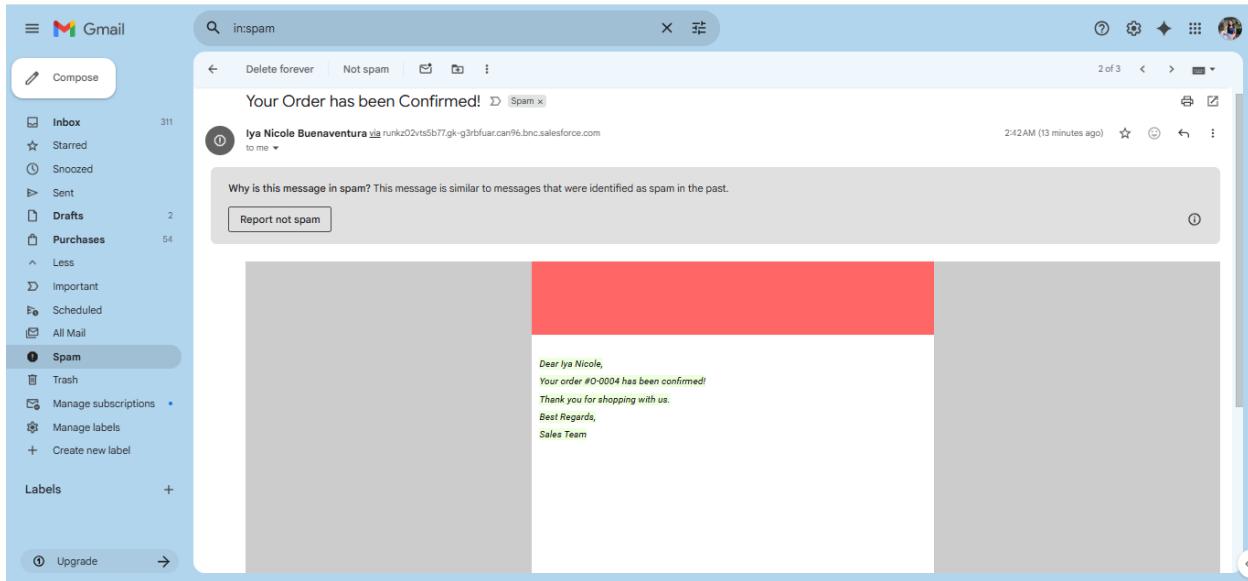
HTML Email Template: Order\_Confirmation\_Email

Preview your email template below.

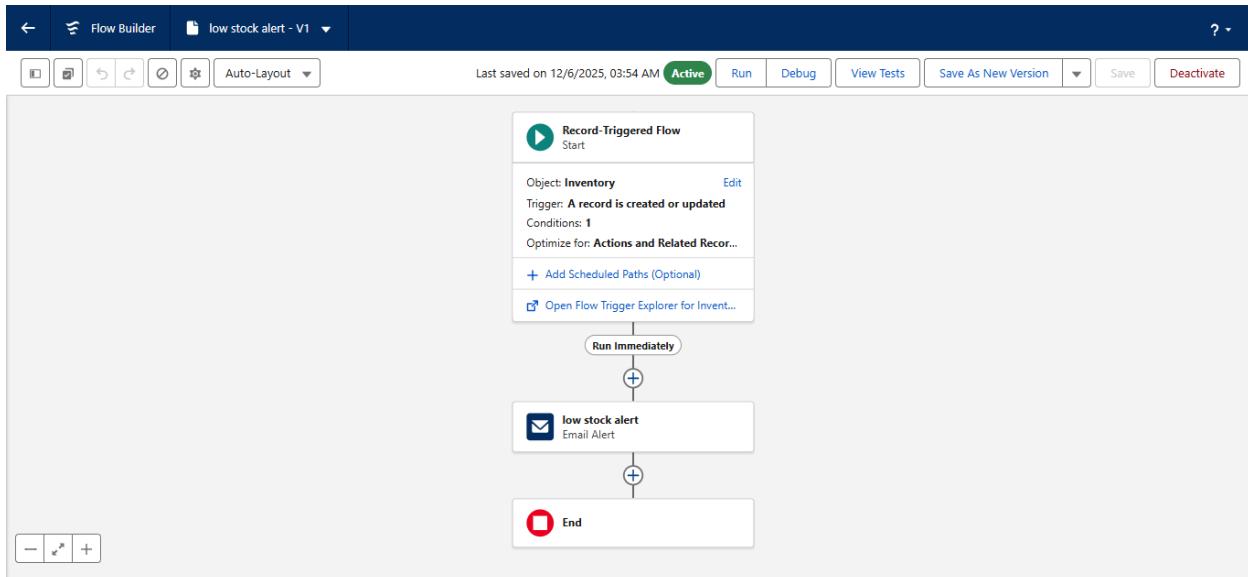
Email Template Detail

Email Template Detail		Edit Properties		Edit HTML Version		Edit Text Version		Delete		Clone	
Email Templates from Salesforce	Unfiled Public Classic Email Templates										
Email Template Name	Order_Confirmation_Email									Available For Use <input checked="" type="checkbox"/>	
Template Unique Name	Order_Confirmation_Email									Last Used Date	
Classic Letterhead	Handsmen Threads									Times Used	
Email Layout	Free Form Letter										
Encoding	Unicode (UTF-8)										
Author	Iya Nicole Buenaventura [Change]										
Description											
Created By	Iya Nicole Buenaventura, 12/5/2025, 10:20 AM									Modified By Iya Nicole Buenaventura, 12/5/2025, 10:32 AM	
<a href="#">Edit Properties</a> <a href="#">Edit HTML Version</a> <a href="#">Edit Text Version</a> <a href="#">Delete</a> <a href="#">Clone</a>											

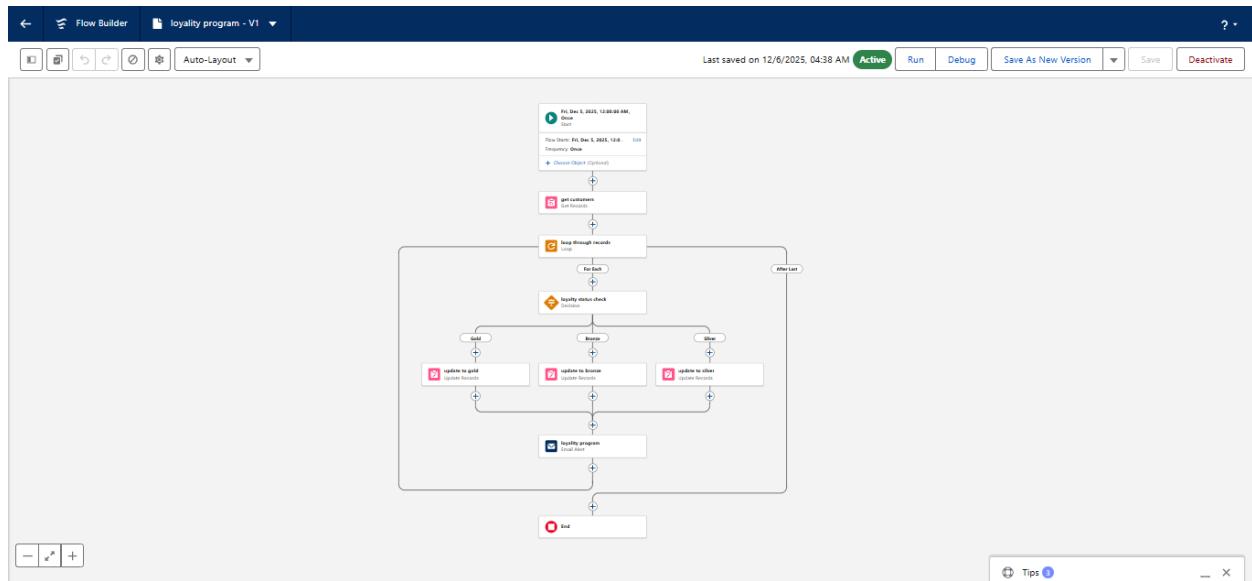
Help for this Page ?



- **Inventory Low Stock Alert** - The flow triggers when an Inventory record is updated and the quantity is below a set threshold (e.g., 5 units).



- **Loyalty Status Update** - The flow checks customer spending and updates the Loyalty Status field on the Customer record.



- Scheduled flows: nightly bulk processing for inventory and financial adjustments.
- **Apex Classes:** Only applied if needed for complex logic exceeding Flow limits.
- **Screenshots:** Document all object creation, validation rules, and automation.

## Phase 3: UI/UX Development & Customization

- **Lightning App:** Tabs for Customers, Products, Orders, Payments, Inventory.

This screenshot shows the 'HandsMen Customers' tab of a Lightning App. The top navigation bar includes tabs for 'HandsMen Threads', 'HandsMen Customers' (which is active), 'HandsMen Orders', 'HandsMen Products', 'Inventory', 'Marketing Campaigns', 'Reports', and 'More'. A search bar and various action buttons are at the top right. Below the tabs, a section titled 'Recently Viewed' displays two items: 'Iya Nicole' and 'John', each with a checkbox and a small circular icon. A note indicates '2 items • Updated a few seconds ago'. To the right is a toolbar with icons for search, filter, sort, and other actions. The main area is currently empty.

This screenshot shows the 'Inventory' tab of the same Lightning App. The top navigation bar remains the same. The 'Inventory' tab is now active. The 'Recently Viewed' section shows two items: 'I-0002' and 'I-0001'. The main area below is currently empty.

- **Page Layouts:** Dynamic forms, conditional visibility, role-based layouts.

The screenshot shows a Salesforce Lightning interface for a customer record. The top navigation bar includes links for HandsMen Threads, HandsMen Customers (selected), HandsMen Orders, HandsMen Products, Inventorys, Marketing Campaigns, Reports, Dashboards, Accounts, and More. The main header displays "HandsMen Customer" and the name "Iya Nicole". Below the header, there are two tabs: "Related" and "Details" (which is currently selected). The "Details" tab contains various fields for the customer record, such as HandsMen Customer Name (Iya Nicole), Email (ixnicole5@gmail.com), Phone, Loyalty Status, FirstName (Iya Nicole), LastName (Buenaventura), FullName (Iya Nicole Buenaventura), Total Purchases (150), and Created By (Iya Nicole Buenaventura, 12/12/2025, 10:29 AM). The Owner field is also listed as Iya Nicole Buenaventura. At the bottom right of the details section, it shows Last Modified By (Iya Nicole Buenaventura, 12/12/2025, 10:49 AM).

- **Reports & Dashboards:** Top-selling products, daily orders, low-stock items, loyalty summaries.
- **User Management:** Profiles, roles, and permission sets based on responsibilities.
- **Lightning Pages:** Custom Home Page and record pages with components.
- **Screenshots:** Include every configuration and page setup.

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## Phase 4: Data Migration, Testing & Security

- **Data Migration:** Use Data Import Wizard and Data Loader for customer, product, order, payment, and loyalty data.
- **Field History Tracking & Duplicate Management:** Track changes and prevent duplicates.
- **Security Configuration:** Profiles, roles, permission sets, and sharing rules applied.
- **Testing Approach:** Prepare test cases for order creation, loyalty updates, low-stock alerts, scheduled flows, and validation rules. Document input and output screenshots.

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## Phase 5: Deployment, Documentation & Maintenance

- **Deployment:** Outbound change sets deployed after sandbox validation.
  - **Maintenance:** Monthly review of workflows and dashboards, monitoring error logs.
  - **Troubleshooting:** Use debug logs, Flow fault emails, and validation error tracking.
  - **Continuous Improvement:** Collect user feedback for system optimization.
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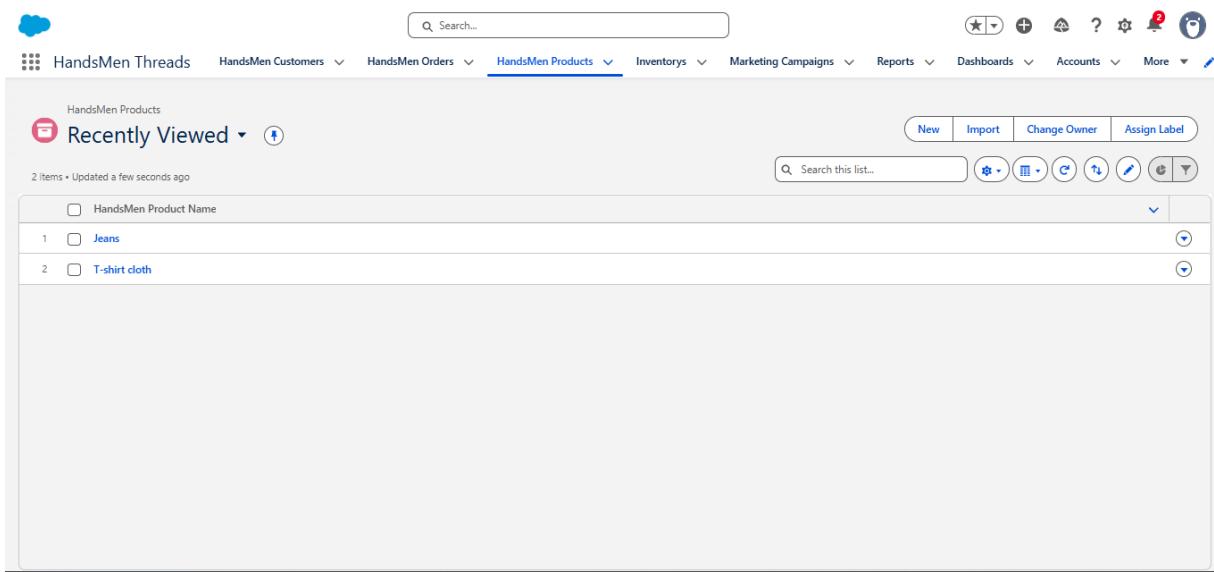
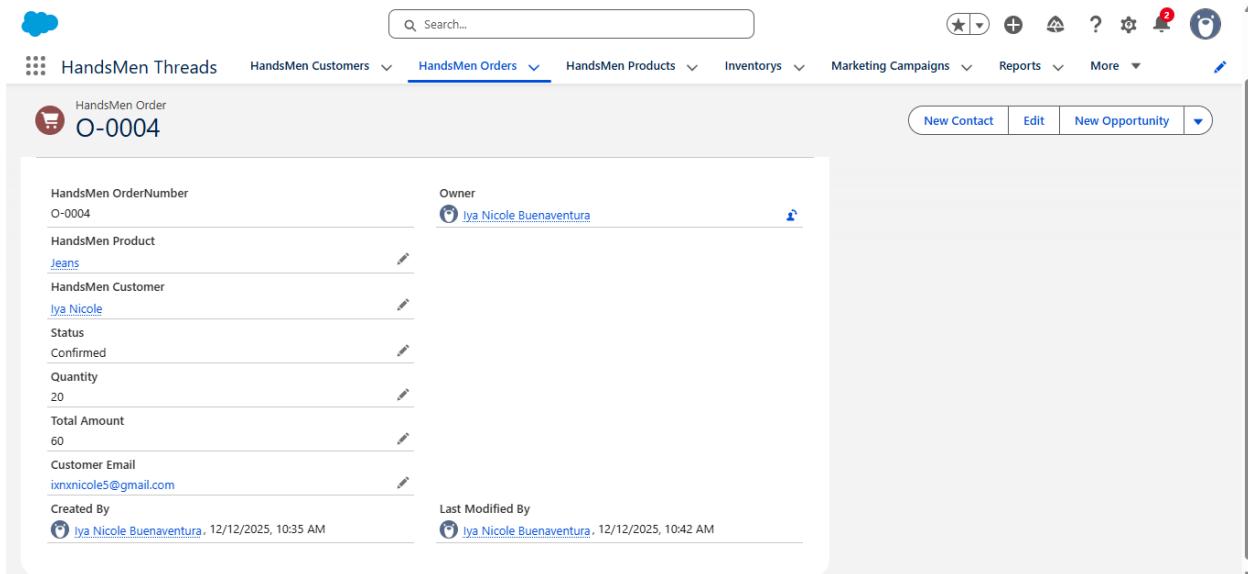
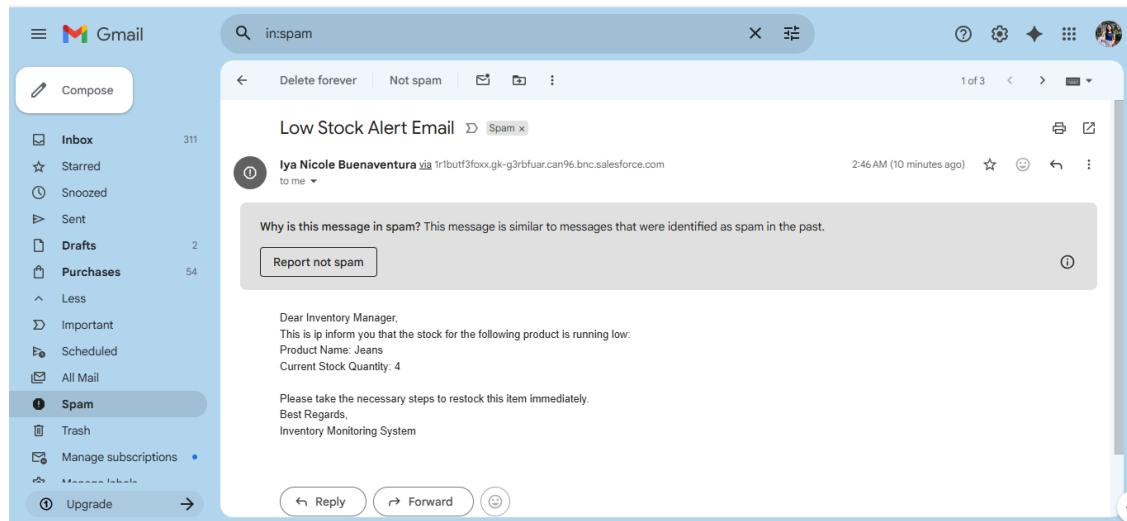


Figure: Product in Handsmen Threads



**Figure: Order Information**



**Figure: Low Stock Alert Email**

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## Conclusion

The Salesforce CRM implementation has successfully provided HandsMen Threads with a centralized operational platform, delivering significant enhancements to both customer and internal experiences. Key operational processes, including orders, loyalty programs, and inventory management, are now fully automated, moving the company beyond manual workflows. The system is further fortified by real-time reporting and dashboards, offering management essential, immediate insights for data-driven decision-making. Built on a secure and scalable architecture, this solution is positioned not just to support current business needs, but also to serve as a robust foundation for future innovation, specifically enabling the integration of AI-based analytics, chatbot customer support, and essential mobile access for staff.

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