

# 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.

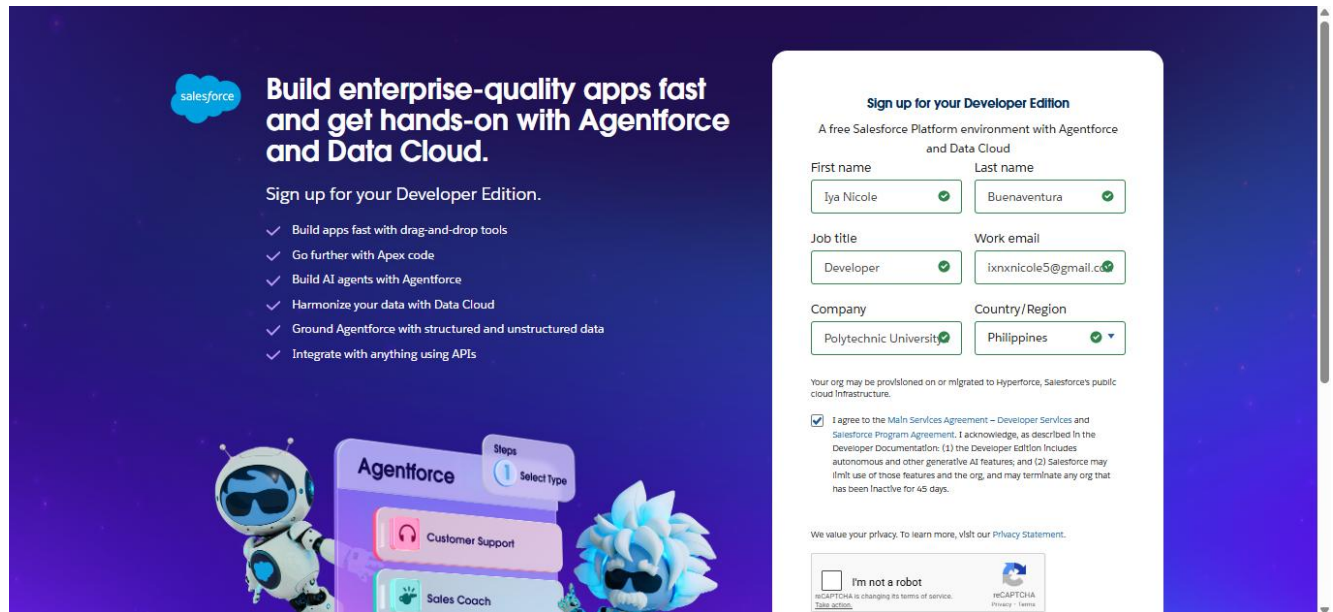
### 5. Execution Roadmap: Requirement gathering → Data modeling → Backend automation → UI setup → Reports & dashboards → Data migration & testing → Deployment → Documentation & demo video.

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## Phase 2: Salesforce Development – Backend & Configurations

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



The image shows the Salesforce Agentforce sign-up page for the Developer Edition. The page has a dark blue background with a light blue sidebar on the left. The sidebar contains the Salesforce logo and the text "Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud." Below this, it says "Sign up for your Developer Edition." and lists five benefits: "Build apps fast with drag-and-drop tools", "Go further with Apex code", "Build AI agents with Agentforce", "Harmonize your data with Data Cloud", "Ground Agentforce with structured and unstructured data", and "Integrate with anything using APIs". The main content area is white and contains a sign-up form. The form has fields for "First name" (Iya Nicole), "Last name" (Buenaventura), "Job title" (Developer), "Work email" (ixnxcnicole5@gmail.com), "Company" (Polytechnic University), and "Country/Region" (Philippines). Below the form, there is a checkbox for "I agree to the Main Services Agreement – Developer Services and Salesforce Program Agreement" and a checkbox for "I'm not a robot". The page also includes a "Steps" section with "1 Select Type" and "2 Customer Support" and "3 Sales Coach".

**Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud.**

Sign up for your Developer Edition.

- ✓ Build apps fast with drag-and-drop tools
- ✓ Go further with Apex code
- ✓ Build AI agents with Agentforce
- ✓ Harmonize your data with Data Cloud
- ✓ Ground Agentforce with structured and unstructured data
- ✓ Integrate with anything using APIs

**Sign up for your Developer Edition**

A free Salesforce Platform environment with Agentforce and Data Cloud

First name: Iya Nicole ✓ Last name: Buenaventura ✓

Job title: Developer ✓ Work email: ixnxcnicole5@gmail.com ✓

Company: Polytechnic University ✓ Country/Region: Philippines ✓

Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud Infrastructure.

☒ I agree to the Main Services Agreement – Developer Services and Salesforce Program Agreement. I acknowledge, as described in the Developer Documentation: (1) the Developer Edition includes autonomous and other generative AI features; and (2) Salesforce may limit use of those features and the org, and may terminate any org that has been inactive for 45 days.

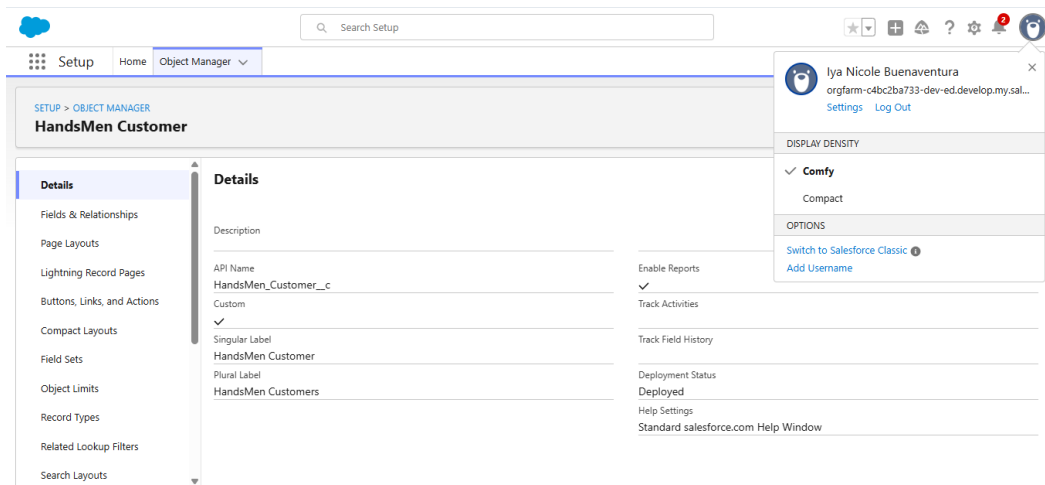
We value your privacy. To learn more, visit our [Privacy Statement](#).

☐ I'm not a robot

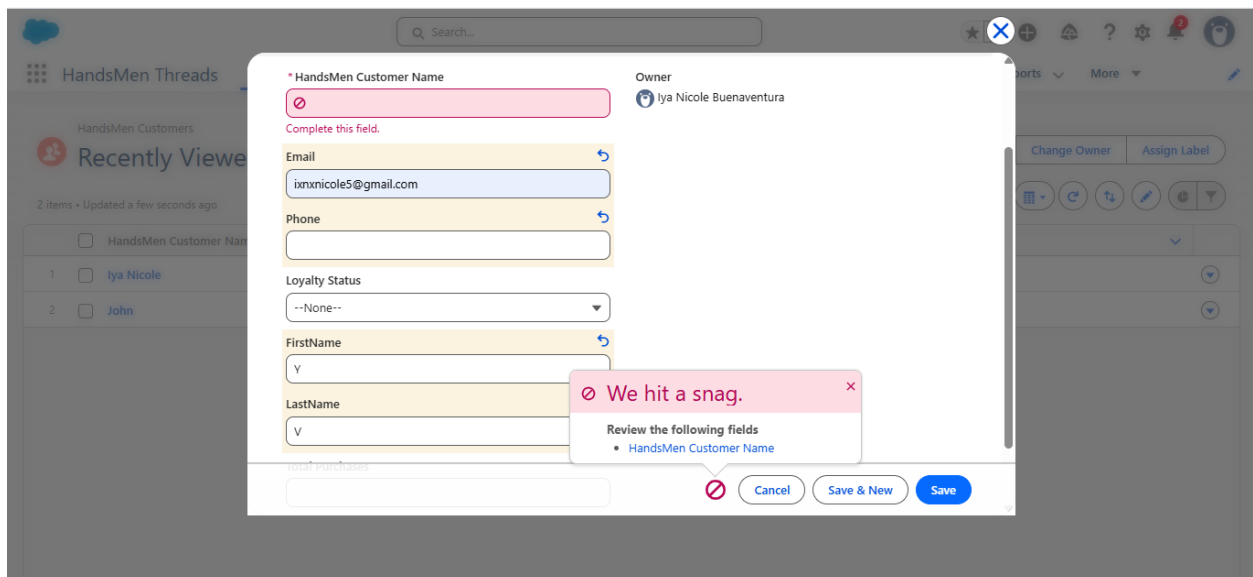
reCAPTCHA is changing its terms of service. [Take action.](#)

reCAPTCHA Privacy - Terms

- **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

ixn Nicole5@gmail.com

Username

ixn Nicoleeee@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

• Automation Flows:

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

SETUP

Classic Email Templates

HTML Email Template

Order\_Confirmation\_Email

Help for this Page

Preview your email template below.

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

☒

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

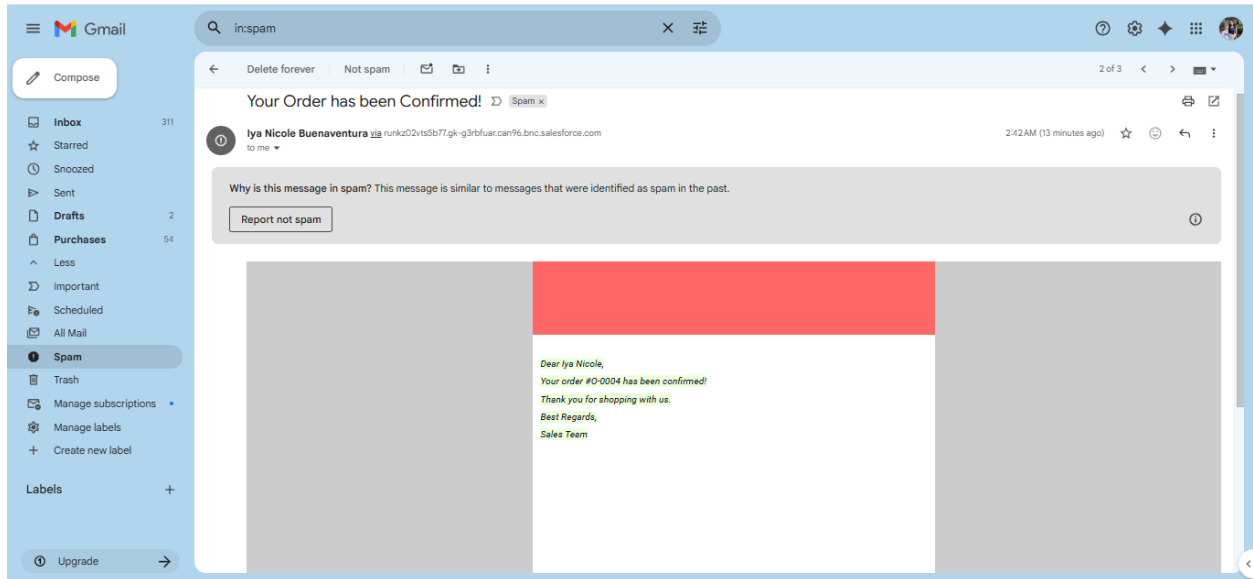
Edit Properties

Edit HTML Version

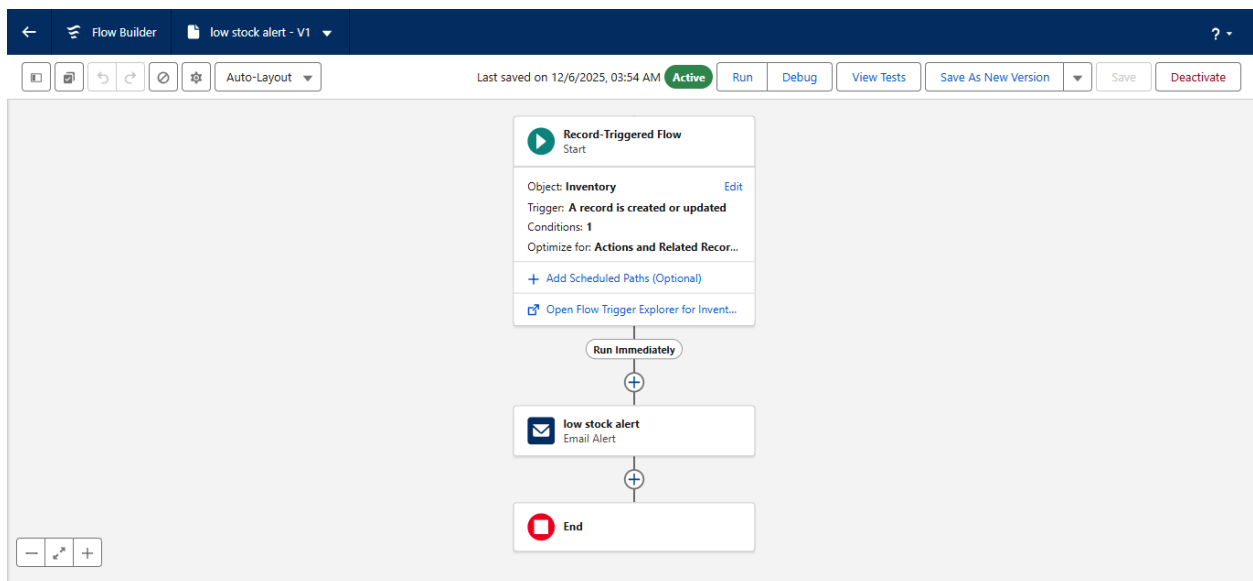
Edit Text Version

Delete

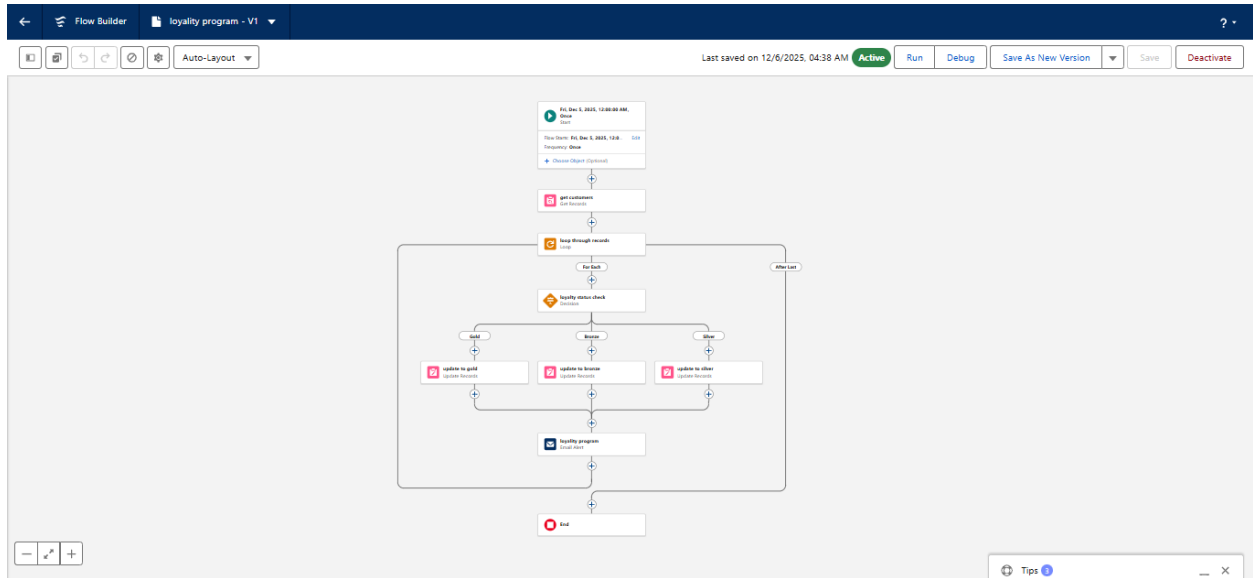
Clone



- **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 in the Lightning App. The interface includes a top navigation bar with a search bar and various utility icons. Below the navigation bar, the 'HandsMen Customers' section is active, displaying a 'Recently Viewed' list. The list contains two items: 'Iya Nicole' and 'John'. The list is titled 'HandsMen Customer Name' and has a search bar and several action icons (New, Import, Change Owner, Assign Label) at the top right. The list is updated a few seconds ago.

HandsMen Customer Name
1 Iya Nicole
2 John

This screenshot shows the 'HandsMen Inventories' tab in the Lightning App. The interface is similar to the previous one, with a top navigation bar and a 'Recently Viewed' list. The list contains two items: 'I-0002' and 'I-0001'. The list is titled 'Inventory Number' and has a search bar and several action icons (New, Import, Assign Label) at the top right. The list is updated a few seconds ago.

Inventory Number
1 I-0002
2 I-0001

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

The screenshot displays a CRM interface for 'HandsMen Threads'. The top navigation bar includes a search bar and various menu items: HandsMen Customers, HandsMen Orders, HandsMen Products, Inventories, Marketing Campaigns, Reports, Dashboards, Accounts, and More. The main content area shows the profile of a customer named 'Iya Nicole'. The profile is divided into two sections: 'Related' and 'Details'. The 'Details' section contains a form with the following fields:

Field	Value	Action
HandsMen Customer Name	Iya Nicole	Edit
Owner	Iya Nicole Buenaventura	Assign
Email	ixnynicole5@gmail.com	Edit
Phone		Edit
Loyalty Status		Edit
FirstName	Iya Nicole	Edit
LastName	Buenaventura	Edit
FullName	Iya Nicole Buenaventura	
Total Purchases	150	Edit
Created By	Iya Nicole Buenaventura, 12/12/2025, 10:29 AM	
Last Modified By	Iya Nicole Buenaventura, 12/12/2025, 10:49 AM	

On the right side of the profile, there are three buttons: 'New Contact', 'Edit', and 'New Opportunity'.

- **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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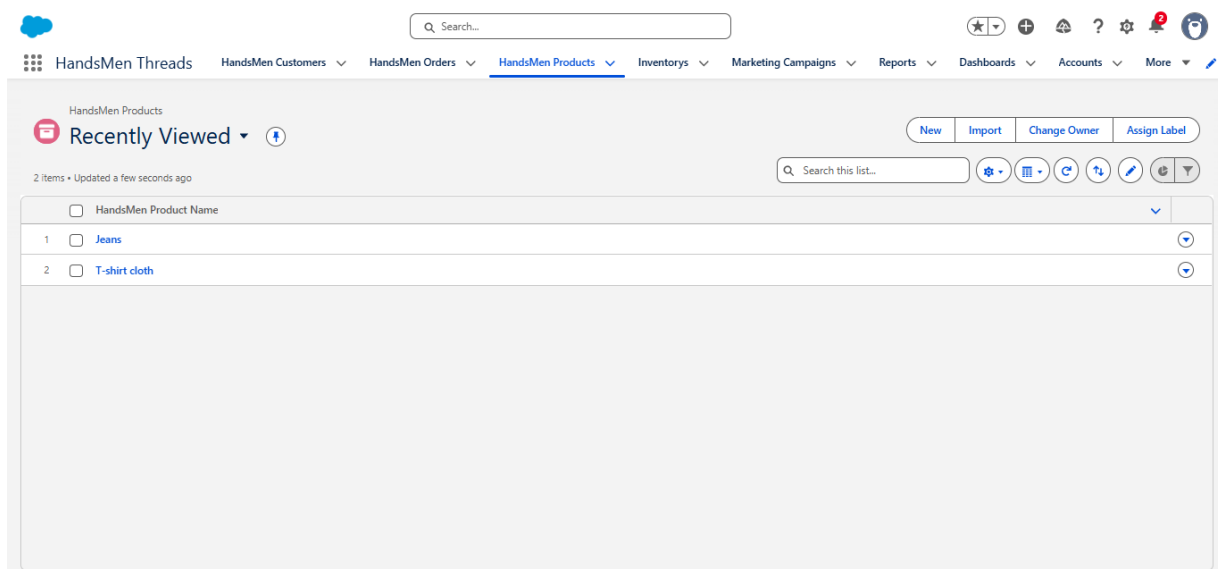
## Phase 4: Data Migration, Testing & Security

- **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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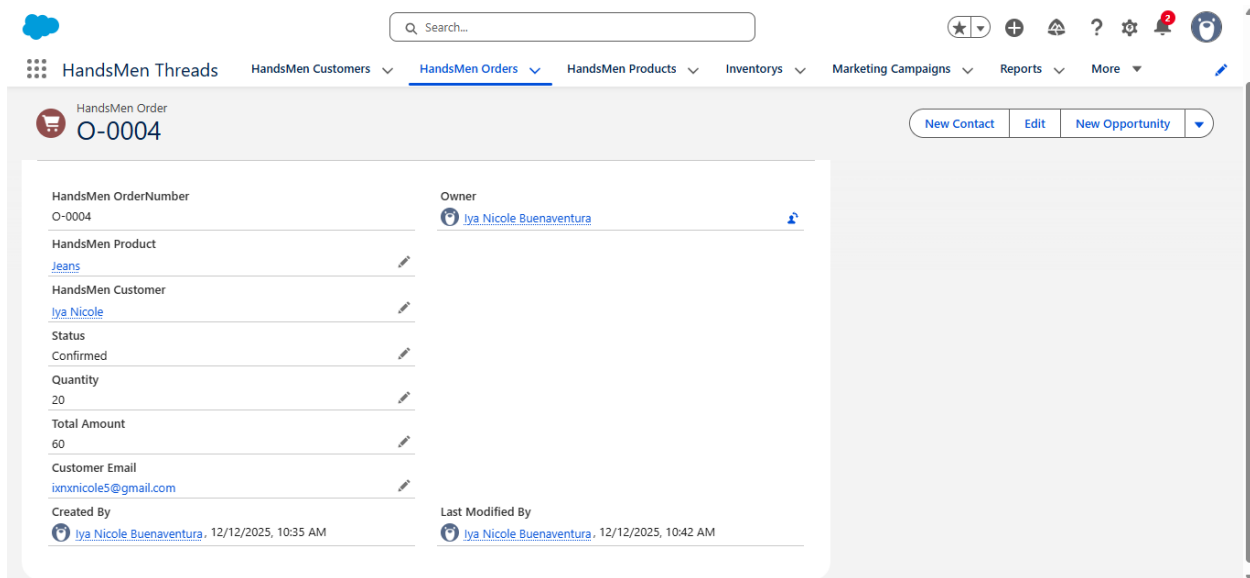
## Phase 5: Deployment, Documentation & Maintenance

- **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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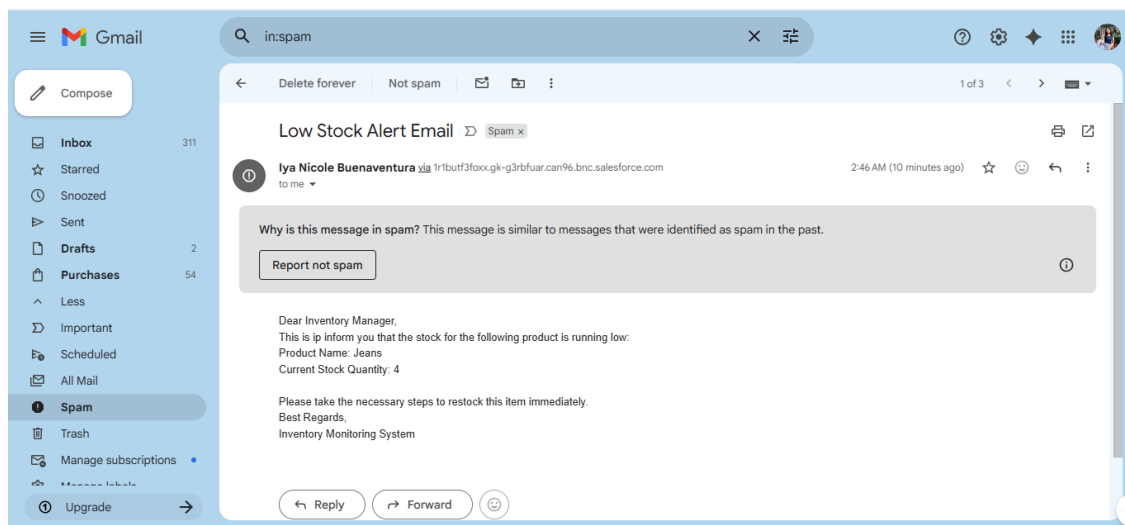


**Figure: Product in Handsmen Threads**

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**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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