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

Project Overview

HandsMen Threads, a dynamic fashion company, is embarking on a Salesforce CRM project to enhance its customer relationship management and operational efficiency. The organization aims to overcome challenges related to scattered customer data, manual order tracking, and inconsistent inventory updates.

This project focuses on designing a custom Salesforce data model with custom objects, automation using Flows, and real-time CRM functionalities that streamline operations across departments. Automated order confirmations, loyalty program updates, and stock alerts will ensure faster, more accurate business processes.

Through this initiative, HandsMen Threads expects to achieve improved customer satisfaction, seamless data management, and enhanced workflow automation, leading to more informed business decisions and long-term growth.

Objectives

Student Outcomes

Hands-on Experience with Salesforce Development:

Students will design and configure custom objects, relationships, and Flows to automate business operations such as order management, stock tracking, and loyalty programs.

Understanding of the CRM Project Lifecycle:

Students will apply the end-to-end Salesforce project phases, including requirement analysis, data modeling, flow automation, testing, and deployment. They will learn how to integrate real-time CRM functionalities that connect sales, warehouse, and customer service operations seamlessly.

Problem-Solving and Analytical Skills:

Students will develop process automation solutions that address real-world challenges in customer engagement and inventory management. They will use Flow logic, decision elements, and conditional automation to build intelligent, data-driven solutions that enhance organizational efficiency.

System Requirements

Hardware Requirements

- Processor: Intel Core i3 or higher (or equivalent)
- RAM: Minimum 4GB RAM (8GB or more recommended for better performance)
- Storage: At least 10GB free disk space
- Display Resolution: Minimum 1366 x 768
- Stable internet Connection

Software Requirements

- Salesforce Developer Edition Org
- Modern Web Browser (e.g. Google Chrome, Firefox, Edge)

Skills Required

- Salesforce Platform Enterprise
- Data Modeling & Security Management
- Automation with Flows
- Reporting and Analytics

Key Features

- Automates order confirmations through email notifications after purchase
- Updates customer loyalty status dynamically based on purchase history
- Sends automatic alerts to the warehouse team when stock levels are low

- Maintains data accuracy through validation and automation in the Salesforce UI
- Utilizes custom objects and Flows to manage core business operations efficiently
- Processes bulk order updates nightly to sync inventory and financial records

Phase 1: Requirement Analysis and & Planning

Objective

To develop a CRM system for HandsMen Threads with an integrated HandsMen Inventory that automates business processes, maintains data accuracy, and enhances customer engagement through custom objects, Flows, and real-time CRM functionalities.

1. HandsMen Threads Inventory Portal

Type: Salesforce App

Purpose: To manage product inventory, track stock levels, and automate key business operations.

Features:

- Real-time inventory tracking and updates
- Automated stock alerts for low inventory levels
- Centralized dashboard for orders, products, and suppliers
- Bulk order processing and financial record synchronization
- Role-based access for admin, warehouse, and sales staff
- Validation and automation to maintain data integrity
- Integrated customer loyalty and order confirmation system

2. Auto-Launched Flow

Type: Flow

Purpose: To automate backend processes without user interaction, ensuring real-time updates and consistent data management across the system.

Features: Automatically triggers order confirmation emails after purchase

- Updates customer loyalty status based on purchase history
- Sends stock alert notifications when inventory falls below set thresholds
- Processes bulk order updates during scheduled automation runs
- Ensures data accuracy through background validation and logic automation

3. UI/UX Development & Customization

Type: Salesforce UI Configuration

Purpose:

To design and customize the Salesforce interface for improved usability, efficient navigation, and better user experience without extensive coding.

Features:

- Configured Lightning App through App Manager for streamlined access
- Customized Page Layouts and Dynamic Forms to enhance data entry and record management
- Managed User Roles and Permissions for secure access control
- Created Reports and Dashboards for real-time performance tracking
- Utilized Lightning Pages for personalized and responsive interfaces

4. Data Migration, Testing & Security

Type: Implementation and Quality Assurance Phase

Purpose: To ensure all business data is accurately migrated, system functionalities are properly tested, and security configurations are implemented to maintain data integrity and user access control.

Features:

- Data loading and migration using Data Import Wizard and Data Loader
- Implementation of Field History Tracking, Duplicate Rules, and Matching Rules for data validation
- Configuration of Profiles, Roles, Role Hierarchy, Permission Sets, and Sharing Rules to control access and visibility
- Development of Test Classes to validate Apex functionality and automation logic
- Preparation of Test Cases for each feature, including booking creation, approval processes, automatic task creation, Flows, and triggers

- Documentation with input and output screenshots for every test case to verify accuracy and functionality

System Architecture

Inventory

- Manages product details, stock levels, and supplier information
- Updates inventory automatically after each sale or restock

Sales

- Handles order creation, payment processing, and customer transactions
- Provides real-time updates on sales performance and order status

Marketing

- Manages customer loyalty programs and promotional campaigns
- Enhances customer engagement through personalized communication

Table of Objects

Custom Objects

1.) HandsMen Customer

API Name: HandsMen_Customer__c

Purpose: Store Customer Information

Field Name	API Name	Data Type	Description
HandsMen Customer Name	Name	Text(80)	Name of the Customer
FirstName	FirstName__c	Text(60)	
LastName	LastName__c	Text(60)	
FullName	FullName__c	Formula (Text)	
Email	Email__c	Email	Customer email
Phone	Phone__c	Phone	
Total Purchases	Total_Purchases__c	Number(18, 0)	Sum of Purchases
Loyalty Status	Loyalty_Status__c	Picklist	Gold, Silver, Bronze

2.) HandsMen Product

API Name: HandsMen_Product__c

Purpose: Store Product Information

Field Name	API Name	Data Type	Description
HandsMen Product Name	Name	Text(80)	Name of product
Price	Price__c	Currency(18, 0)	Price of product
SKU	SKU__c	Text(60)	SKU number

Stock Quantity	Stock_Quantity__c	Number(18, 0)	Stocks Left

3.) HandsMen Order

API Name: HandsMen_Order__c

Purpose: Store Order Information

Field Name	API Name	Data Type	Description
HandsMen OrderNumber	Name	Auto Number	Auto Number
Status	Status__c	Picklist	Pending, Confirmed, Rejection
Quantity	Quantity__c	Number	Number of Products
Total Amount	Total_Amount__c	Number	Total Price
HandsMen Product	HandsMen_Product__c	Lookup(HandsMen Product)	Product Info
HandsMen Customer	HandsMen_Customer__c	Lookup(HandsMen Customer)	Customer Info
Customer Email	Customer_Email__c	Email	Customer Email

4.) Inventory

API Name: Inventory__c

Purpose: Store Inventory Information

Field Name	API Name	Data Type	Description
HandsMen Product	HandsMen_Product__c	Master-Detail(HandsMen	Linked with

		Product)	HandsMen Product
Inventory Number	Name	Auto Number	
Stock Quantity	Stock_Quantity__c	Number(18, 0)	Number of stocks left
Stock Status	Stock_Status__c	Formula (Text)	Low stock alert
Warehouse	Warehouse__c	Text(60)	Where the stocks are stored

5.) Marketing Campaign

API Name Marketing_Campaign__c

Purpose: Store Inventory Information

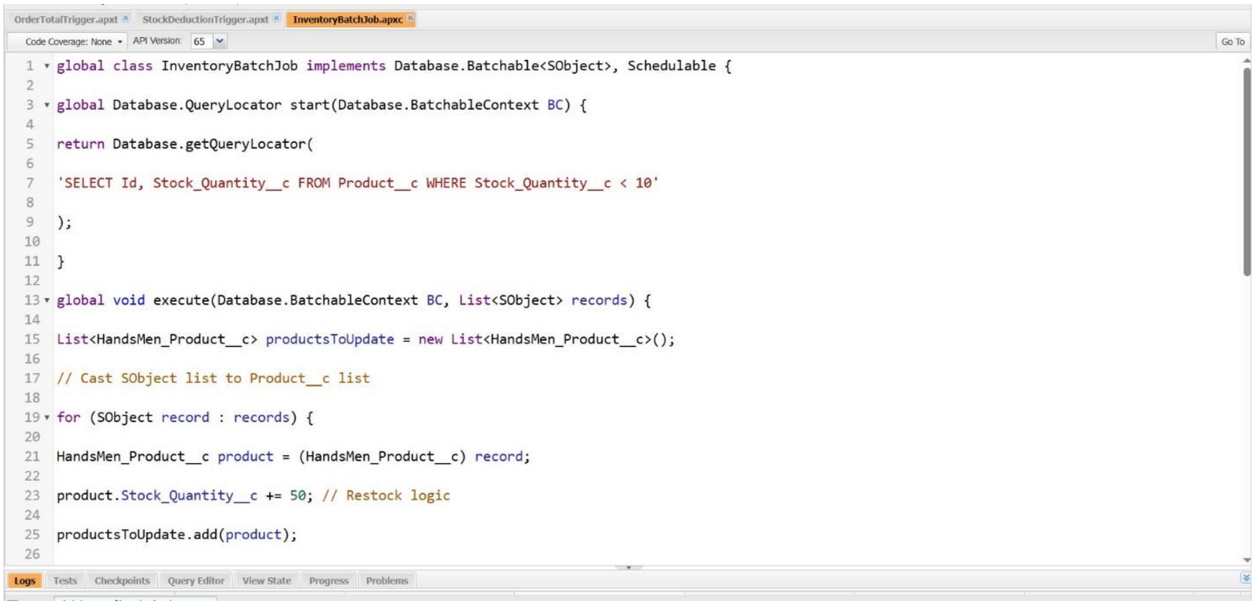
Field Name	API Name	Data Type	Description
Marketing Campaign Number	Name	Auto Number	
HandsMen Customer	HandsMen_Customer__c	Lookup(HandsMen Customer)	Customer Name
Start Date	Start_Date__c	Date	
End Date	End_Date__c	Date	

User Story 1: Inventory Management

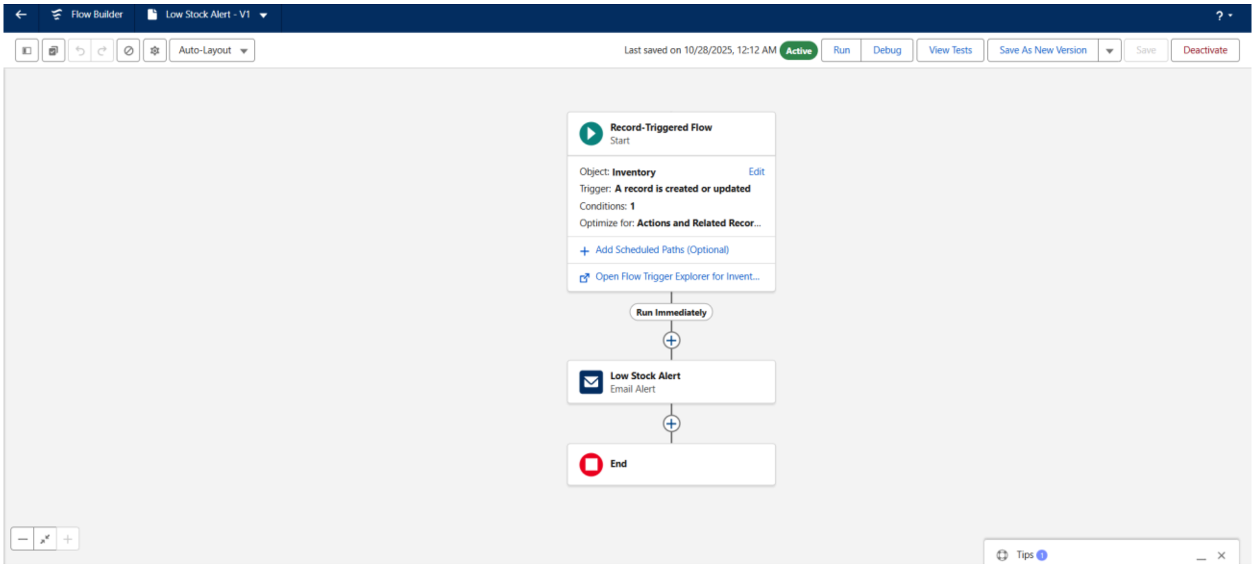
As an Inventory Manager, I want to update product quantities and supplier details through the system so that data stays accurate and up to date.

Implementation:

- Created custom objects for **Product** and **Supplier**
- Configured relationships between **Product** and **Supplier** for easy data updates
- Used **Record-Triggered Flows** to automatically adjust stock levels after transactions



```
global class InventoryBatchJob implements Database.Batchable<SObject>, Schedulable {

global Database.QueryLocator start(Database.BatchableContext BC) {

return Database.getQueryLocator(

'SELECT Id, Stock_Quantity__c FROM Product__c WHERE Stock_Quantity__c < 10'

);

}

global void execute(Database.BatchableContext BC, List<SObject> records) {

List<HandsMen_Product__c> productsToUpdate = new List<HandsMen_Product__c>();

// Cast SObject list to Product__c list

for (SObject record : records) {

HandsMen_Product__c product = (HandsMen_Product__c) record;

product.Stock_Quantity__c += 50; // Restock logic

productsToUpdate.add(product);

```



Last saved on 10/28/2025, 12:12 AM

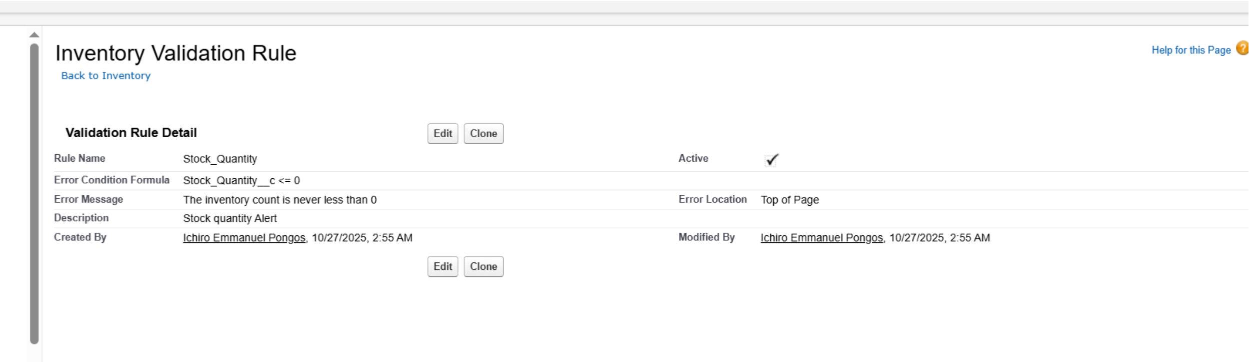
Object: Inventory

Trigger: A record is created or updated

Conditions: 1

Optimize for: Actions and Related Recor...

- Enabled **Validation Rules** to ensure data integrity when updating inventory details



Inventory Validation Rule

Back to Inventory

Help for this Page

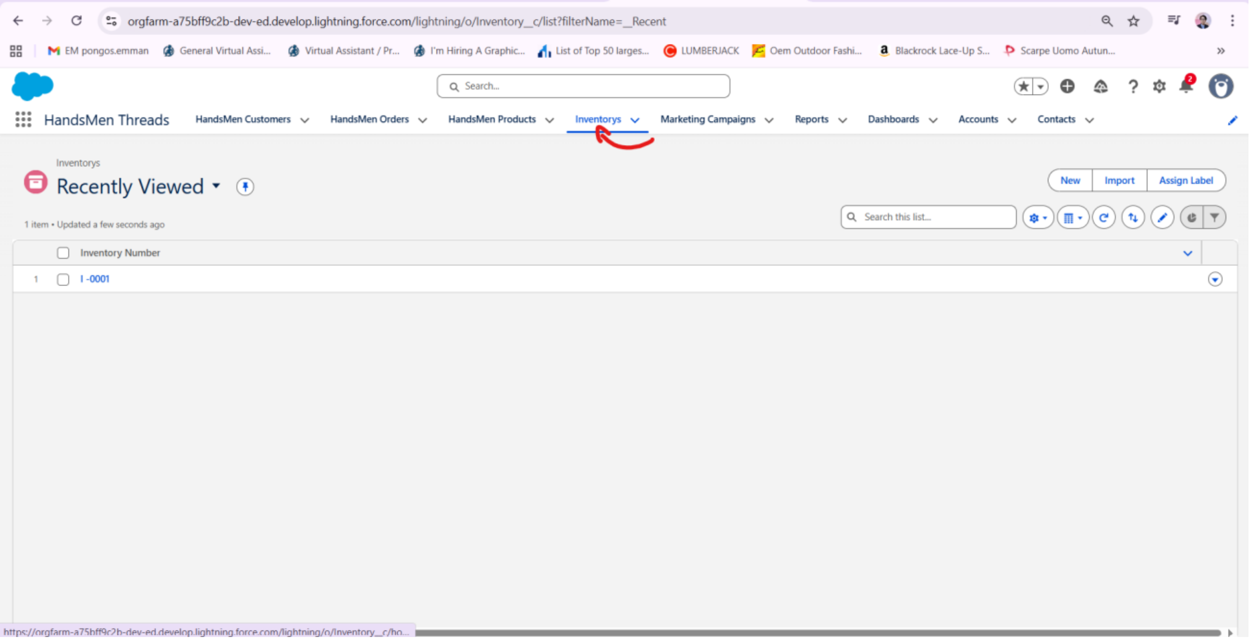
Validation Rule Detail Edit Clone

Rule Name	Stock_Quantity	Active	✓
Error Condition Formula	Stock_Quantity__c <= 0		
Error Message	The inventory count is never less than 0	Error Location	Top of Page
Description	Stock quantity Alert		
Created By	Ichiro Emmanuel Pongos, 10/27/2025, 2:55 AM	Modified By	Ichiro Emmanuel Pongos, 10/27/2025, 2:55 AM

Edit Clone

Steps:

1. Navigate to the **Inventorys** in the HandsMen Threads App



Inventorys

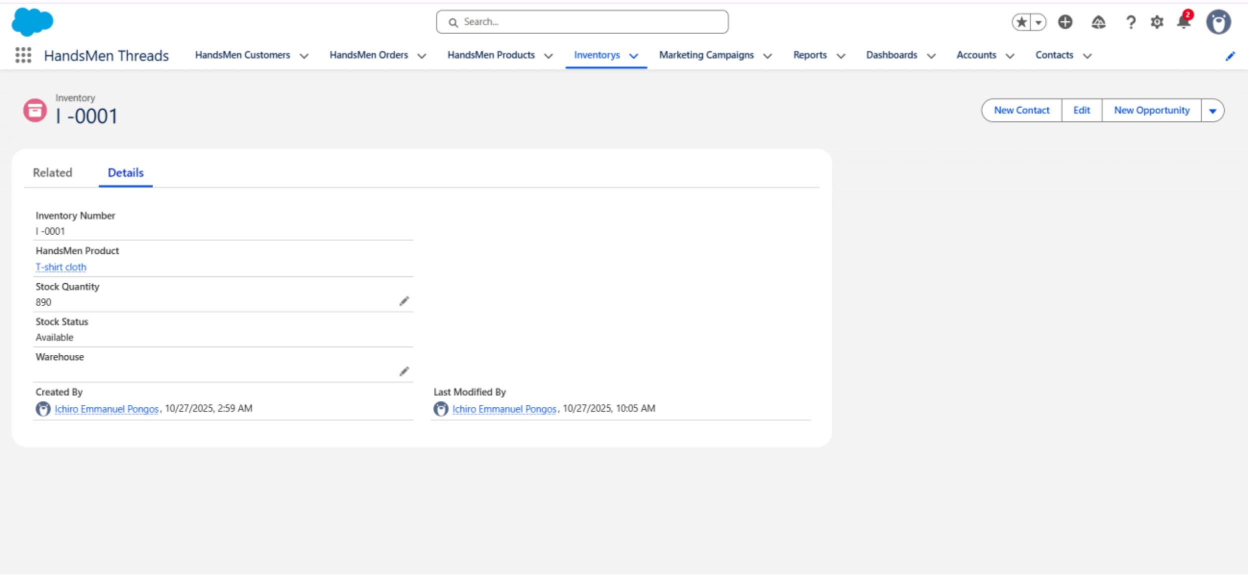
Recently Viewed

1 item • Updated a few seconds ago

	Inventory Number
1	I -0001

2. Select a product record to update

3. Edit the **Quantity** or **Supplier** field as needed



Inventory
I -0001

Inventory Number
I -0001

HandsMen Product
T-shirt cloth

Stock Quantity
890

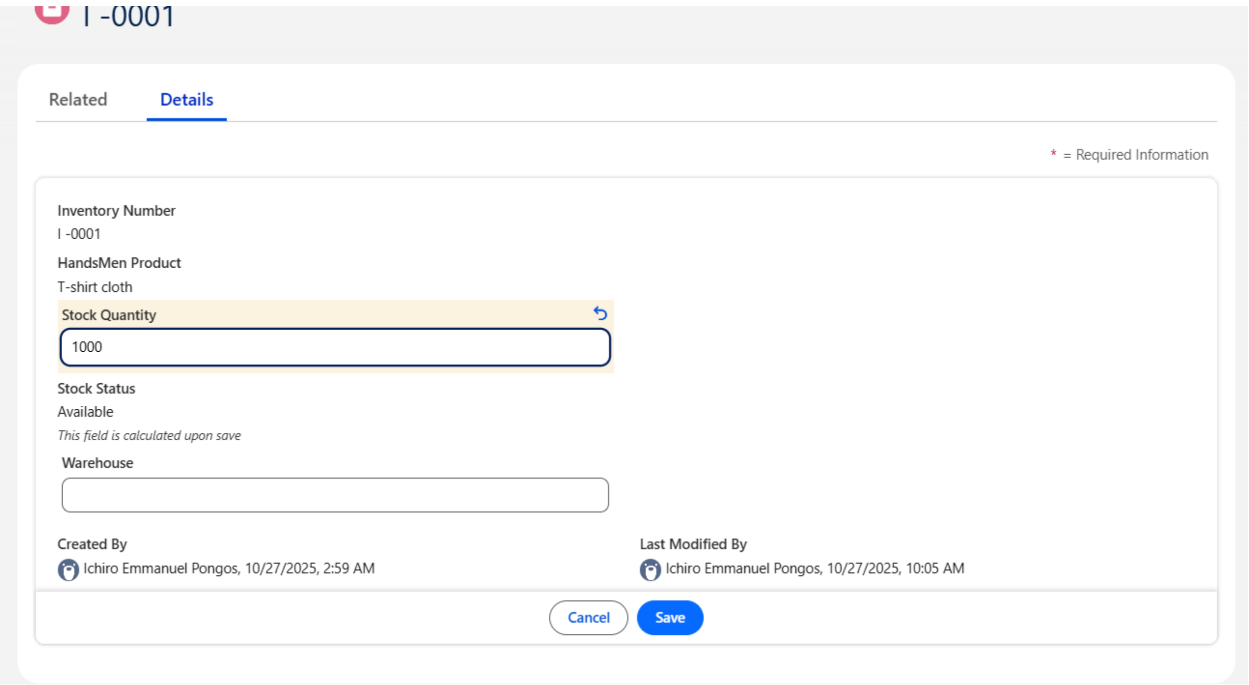
Stock Status
Available

Warehouse

Created By
Ichiro Emmanuel Pongos, 10/27/2025, 2:59 AM

Last Modified By
Ichiro Emmanuel Pongos, 10/27/2025, 10:05 AM

4. Save the record to trigger automatic updates in stock data



I -0001

* = Required Information

Inventory Number
I -0001

HandsMen Product
T-shirt cloth

Stock Quantity
1000

Stock Status
Available
This field is calculated upon save

Warehouse

Created By
Ichiro Emmanuel Pongos, 10/27/2025, 2:59 AM

Last Modified By
Ichiro Emmanuel Pongos, 10/27/2025, 10:05 AM

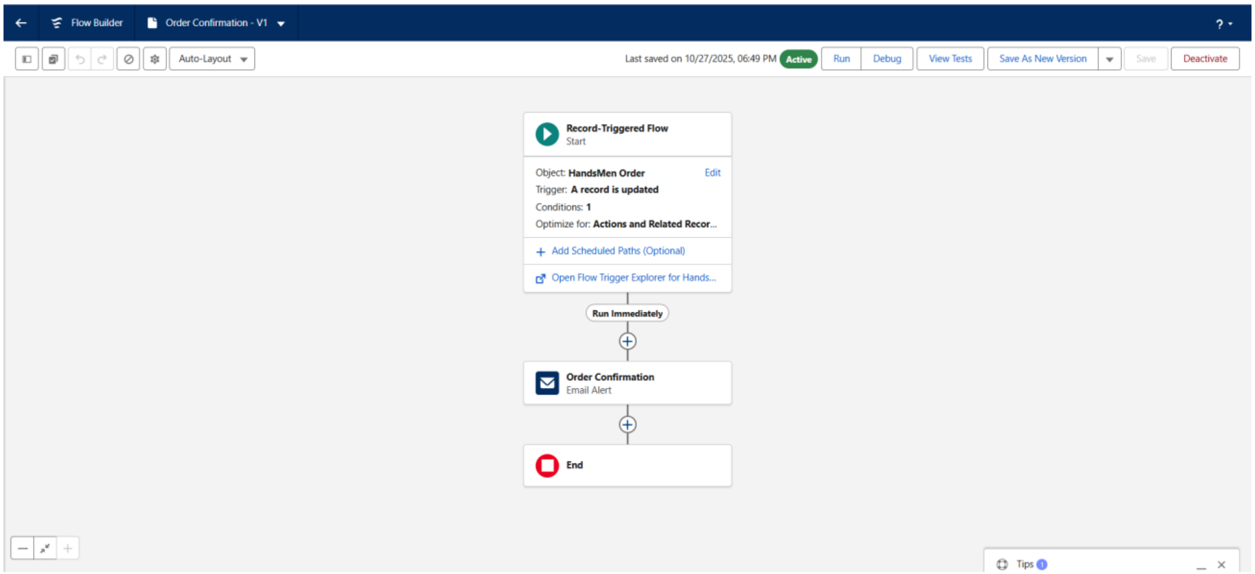
User Story 2: Sales Management

As a Sales Representative, I want to create and confirm customer orders easily so I can complete transactions efficiently.

Implementation:

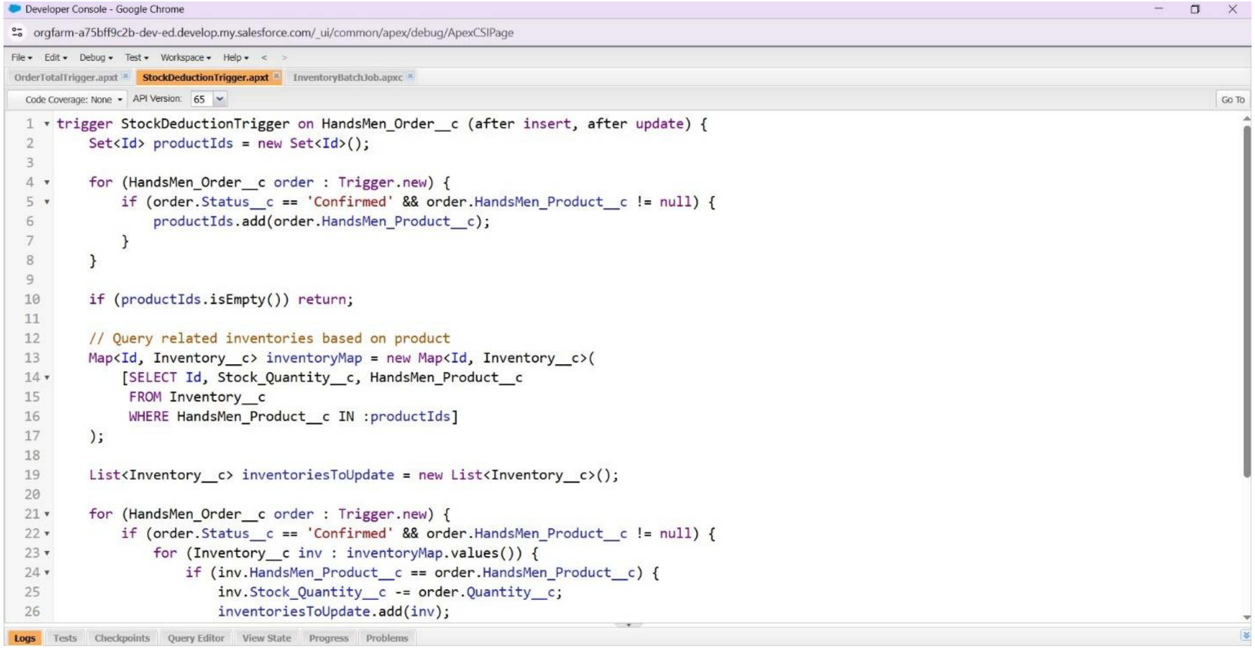
- Created a **Sales Order** custom object to manage customer orders
- Built a **Screen Flow** for guided order creation and confirmation

- Automated **status updates** using Flows and Process Builder



Object: HandsMen Order
Trigger: A record is updated
Conditions: 1
Optimize for: Actions and Related Recor...

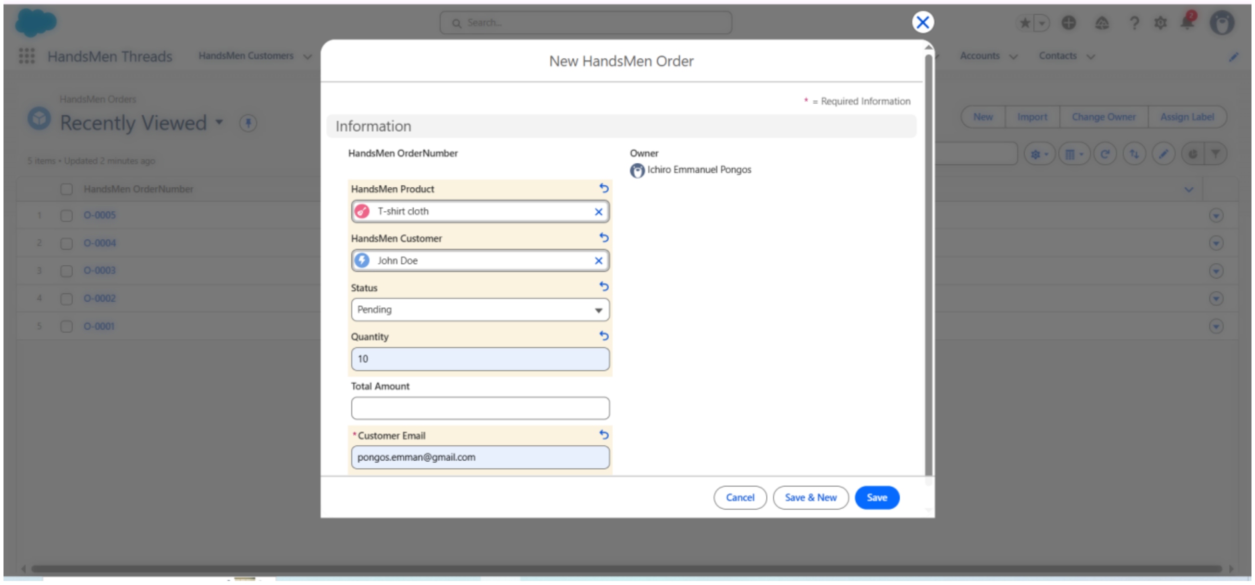
- Integrated with **Inventory** to adjust stock levels after order confirmation



```
trigger StockDeductionTrigger on HandsMen_Order__c (after insert, after update) {
    Set<Id> productIds = new Set<Id>();

    for (HandsMen_Order__c order : Trigger.new) {
        if (order.Status__c == 'Confirmed' && order.HandsMen_Product__c != null) {
            productIds.add(order.HandsMen_Product__c);
        }
    }

    if (productIds.isEmpty()) return;

    // Query related inventories based on product
    Map<Id, Inventory__c> inventoryMap = new Map<Id, Inventory__c>(
        [SELECT Id, Stock_Quantity__c, HandsMen_Product__c
         FROM Inventory__c
         WHERE HandsMen_Product__c IN :productIds]
    );

    List<Inventory__c> inventoriesToUpdate = new List<Inventory__c>();

    for (HandsMen_Order__c order : Trigger.new) {
        if (order.Status__c == 'Confirmed' && order.HandsMen_Product__c != null) {
            for (Inventory__c inv : inventoryMap.values()) {
                if (inv.HandsMen_Product__c == order.HandsMen_Product__c) {
                    inv.Stock_Quantity__c -= order.Quantity__c;
                    inventoriesToUpdate.add(inv);
```

Steps:

1. Navigate to the **HandsMen Orders** in the HandsMen Threads App
2. Click **New** and enter customer and product details



New HandsMen Order

* = Required Information

Information

HandsMen OrderNumber

Owner
Ichiro Emmanuel Pongos

HandsMen Product
T-shirt cloth

HandsMen Customer
John Doe

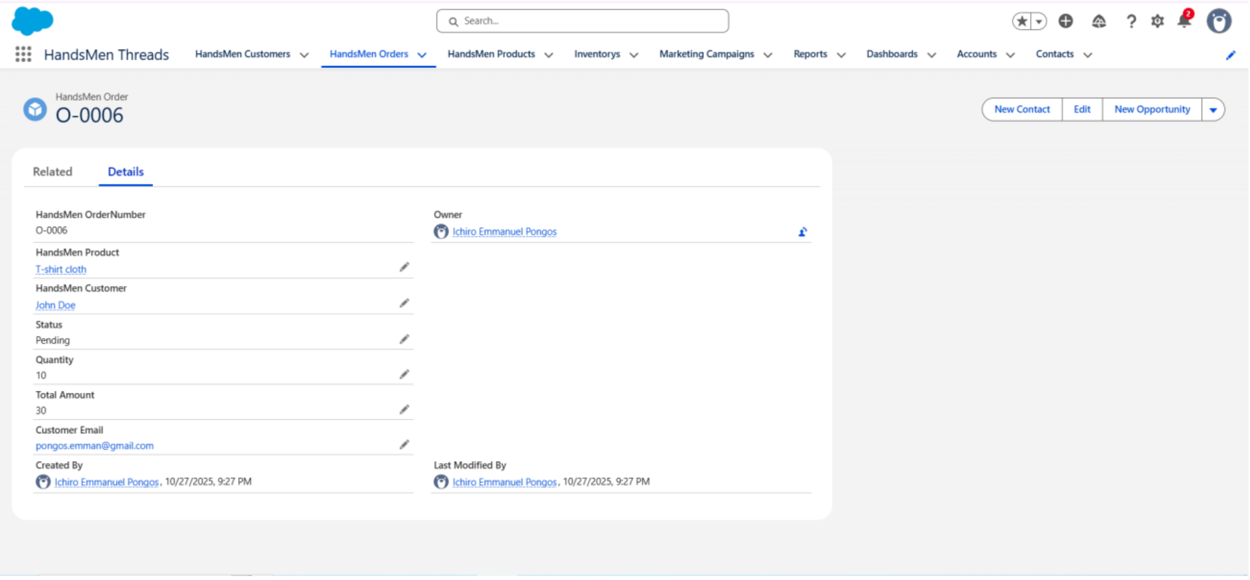
Status
Pending

Quantity
10

Total Amount

*Customer Email
pongos.emman@gmail.com

3. Review the total and confirm the order by changing the status of the order to Confirmed



HandsMen Order
O-0006

HandsMen OrderNumber
O-0006

Owner
Ichiro Emmanuel Pongos

HandsMen Product
T-shirt cloth

HandsMen Customer
John Doe

Status
Pending

Quantity
10

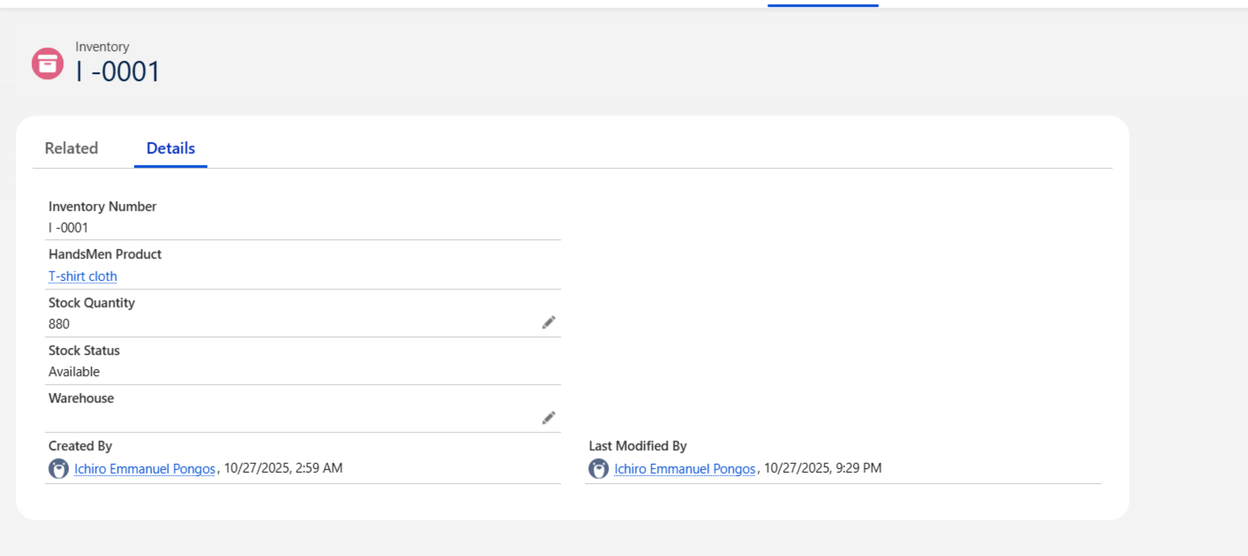
Total Amount
30

Customer Email
pongos.emman@gmail.com

Created By
Ichiro Emmanuel Pongos, 10/27/2025, 9:27 PM

Last Modified By
Ichiro Emmanuel Pongos, 10/27/2025, 9:27 PM

4. System automatically sends confirmation and updates inventory



Inventory

I -0001

Inventory Number
I -0001

HandsMen Product
T-shirt cloth

Stock Quantity
880

Stock Status
Available

Warehouse

Created By
Ichiro Emmanuel Pongos, 10/27/2025, 2:59 AM

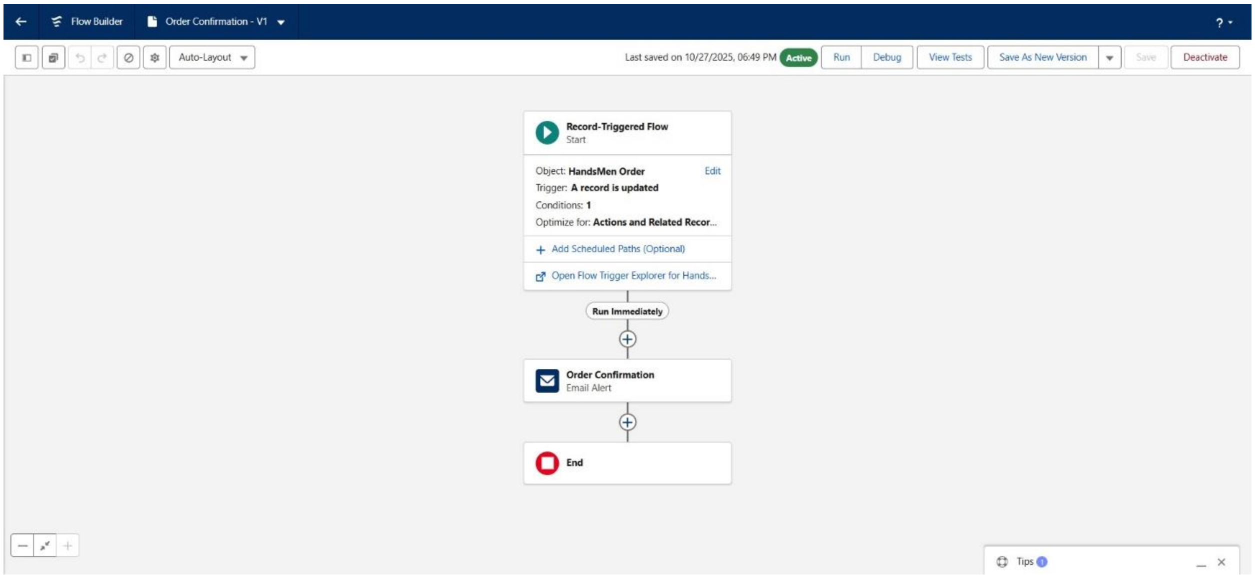
Last Modified By
Ichiro Emmanuel Pongos, 10/27/2025, 9:29 PM

User Story 3: Customer Order Confirmation

As a Sales Representative, I want to ensure customers receive an order confirmation email immediately after purchase, so they know their order has been placed successfully.

Implementation:

- Configured Email Alerts through Flows to send confirmation automatically



Last saved on 10/27/2025, 06:49 PM

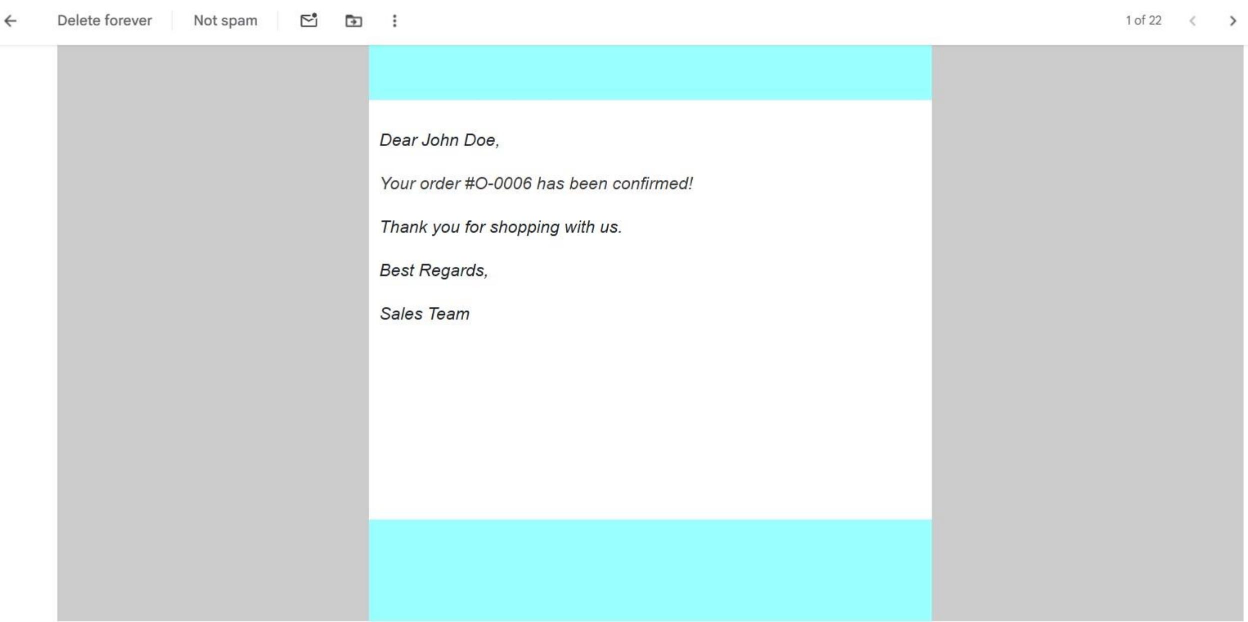
Record-Triggered Flow
Start

Object: HandsMen Order
Trigger: A record is updated
Conditions: 1
Optimize for: Actions and Related Recor...

Order Confirmation
Email Alert

End

- Created an Email Template containing order details and summary



Dear John Doe,

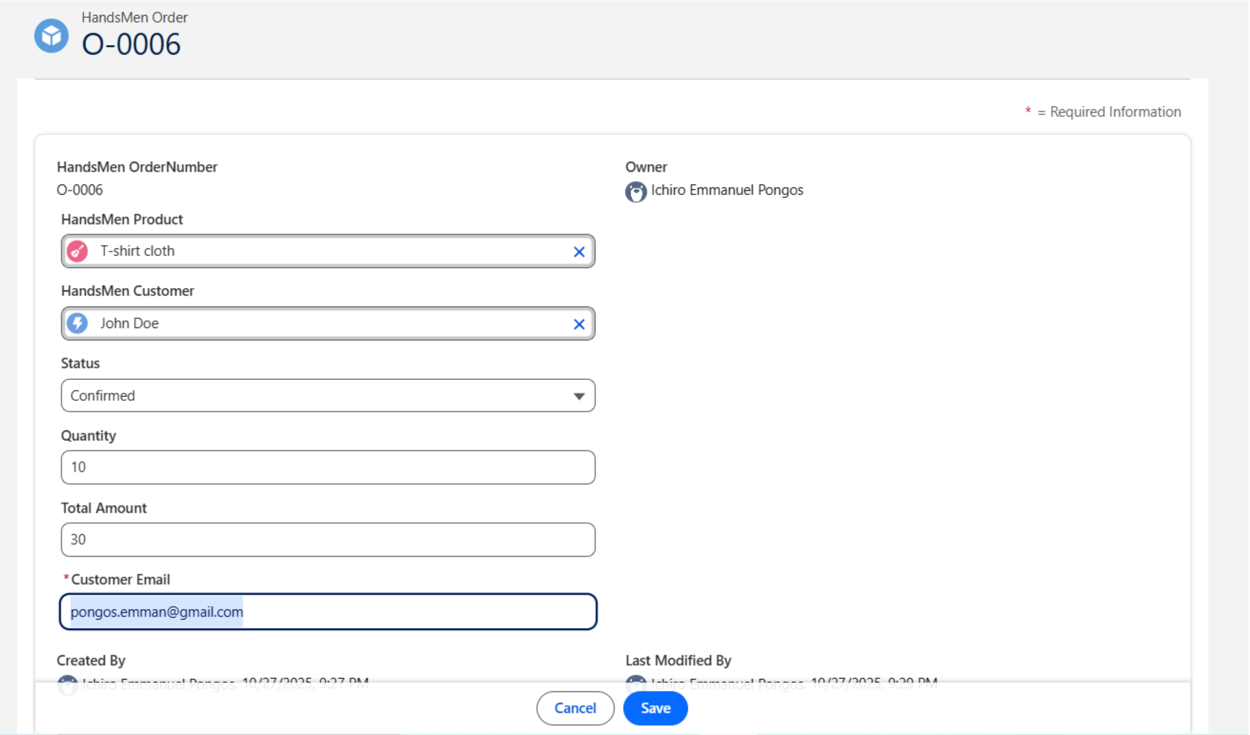
Your order #O-0006 has been confirmed!

Thank you for shopping with us.

Best Regards,

Sales Team

- Connected the automation to trigger upon order status change to “Confirmed”
- Sales Representatives input or verify customer email addresses before confirmation


HandsMen Order

O-0006

* = Required Information

HandsMen OrderNumber
O-0006

Owner
Ichiro Emmanuel Pongos

HandsMen Product
T-shirt cloth

HandsMen Customer
John Doe

Status
Confirmed

Quantity
10

Total Amount
30

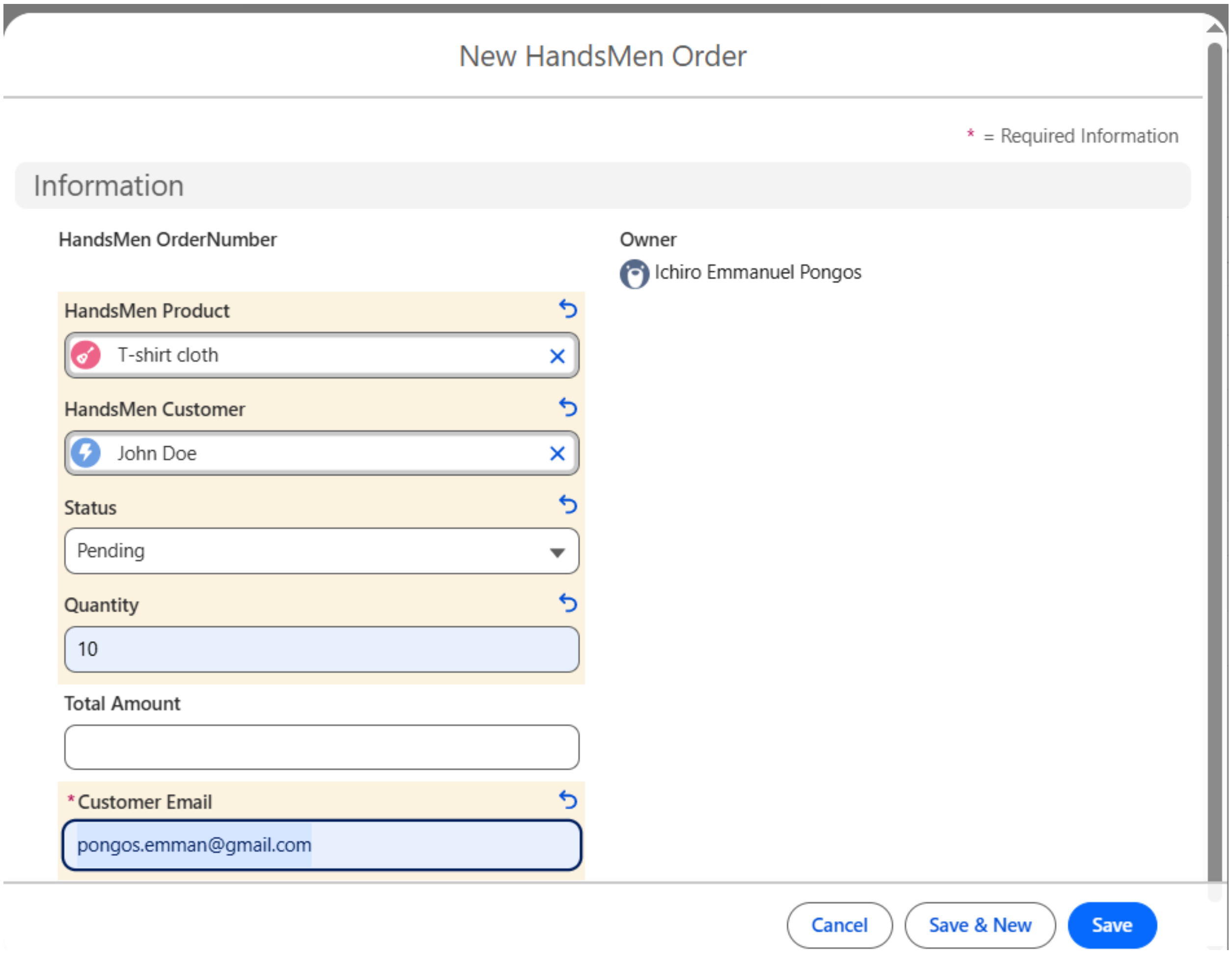
*Customer Email
pongos.emman@gmail.com

Created By
Ichiro Emmanuel Pongos, 10/27/2025, 9:27 PM

Last Modified By
Ichiro Emmanuel Pongos, 10/27/2025, 9:29 PM

Steps:

1. Sales Representative inputs or verifies the customer’s email address in the order record


New HandsMen Order

* = Required Information

Information

HandsMen OrderNumber

Owner
Ichiro Emmanuel Pongos

HandsMen Product
T-shirt cloth

HandsMen Customer
John Doe

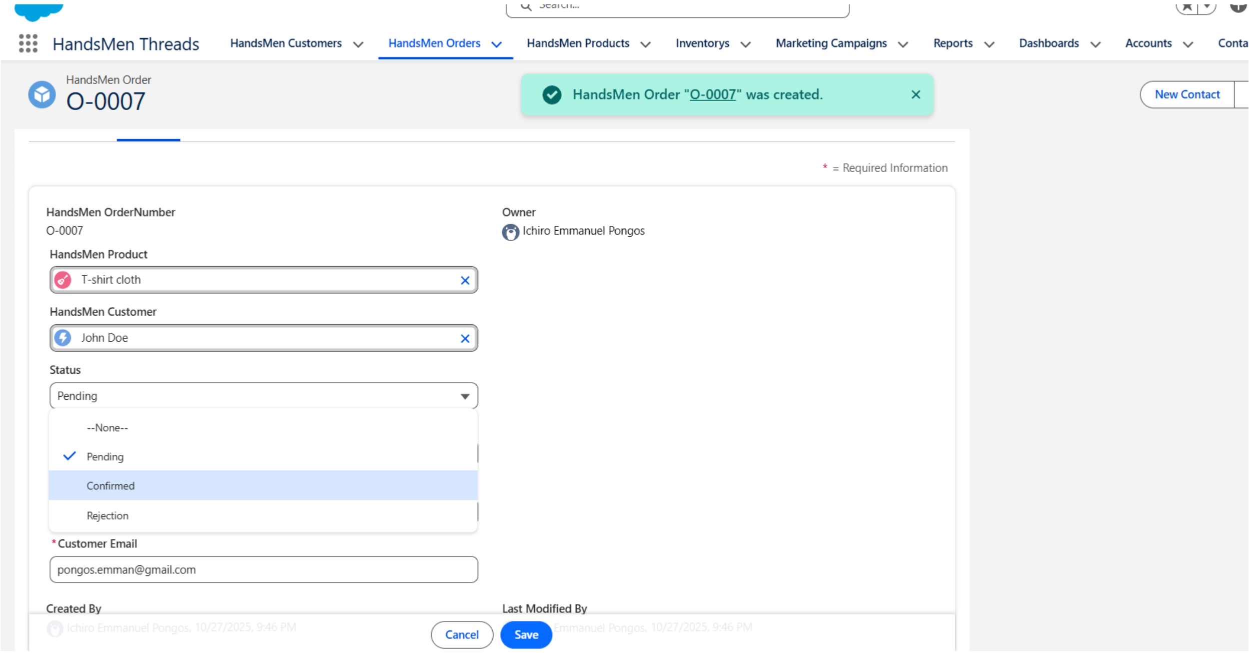
Status
Pending

Quantity
10

Total Amount

*Customer Email
pongos.emman@gmail.com

2. The Sales Representative confirms the order



HandsMen Order
O-0007

HandsMen Order "O-0007" was created.

* = Required Information

HandsMen OrderNumber
O-0007

Owner
Ichiro Emmanuel Pongos

HandsMen Product
T-shirt cloth

HandsMen Customer
John Doe

Status
Pending

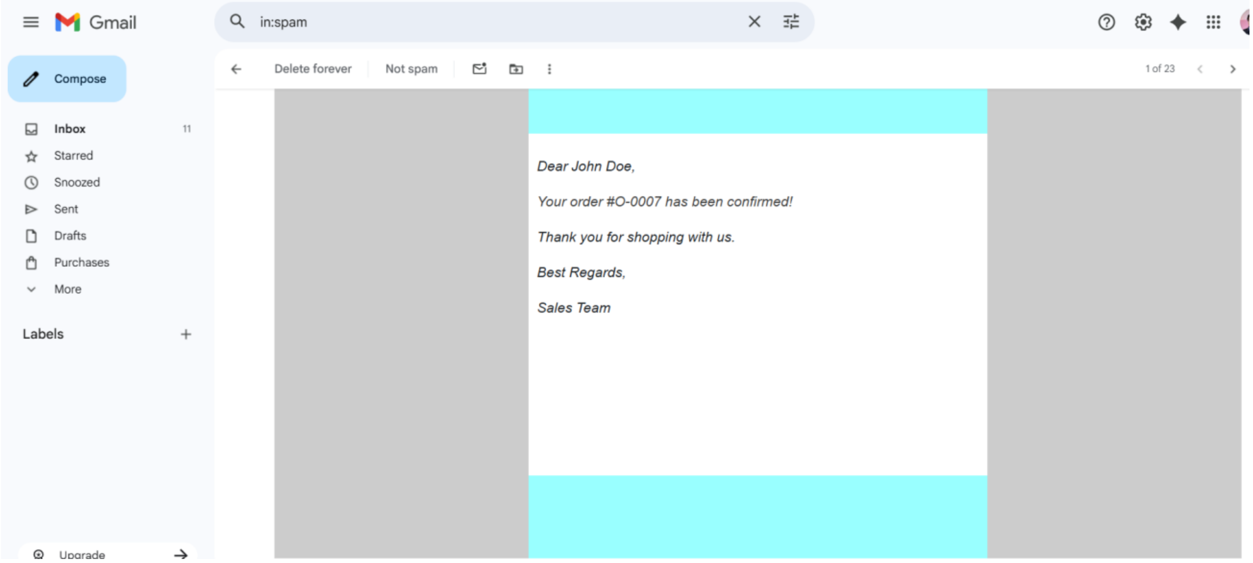
--None--
✓ Pending
Confirmed
Rejection

*Customer Email
pongos.emman@gmail.com

Created By
Ichiro Emmanuel Pongos, 10/27/2025, 9:46 PM

Last Modified By
Emmanuel Pongos, 10/27/2025, 9:46 PM

3. The order status changes to “Confirmed”
4. The Flow triggers an automated email alert to the customer’s email
5. The customer receives the confirmation message with order details



Dear John Doe,

Your order #O-0007 has been confirmed!

Thank you for shopping with us.

Best Regards,

Sales Team