

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

ABSTRACT

This project details the successful implementation of a customized Salesforce CRM solution for HandsMen Threads, an innovative organization in the fashion industry. The initiative focused on consolidating disparate data sources into a unified platform that serves as the single source of truth for all customer and operational information. The new system empowers sales, customer service, and warehouse teams with accurate, real-time data and intelligent automation capabilities. Key features include automated customer communications, dynamic loyalty program management, proactive inventory monitoring, and streamlined bulk order processing—all designed to enhance customer relationships and drive operational excellence.

OBJECTIVES

The main objective of this project is to develop and implement a customized Salesforce CRM solution for HandsMen Threads to streamline core business operations, maintain data integrity, and enhance customer satisfaction.

By building a centralized system to manage customers, orders, products, inventory, and marketing campaigns, the project aims to:

- Automate key processes such as order confirmations, loyalty status updates, and stock alerts.
- Ensure accurate and consistent data entry using validation rules.
- Enable real-time visibility of inventory and customer interactions.
- Improve internal team coordination through role-based access control.
- Deliver personalized customer experiences through targeted communication and loyalty programs.

TECHNOLOGY DESCRIPTION

Salesforce:-

Salesforce is a cloud-based Customer Relationship Management (CRM) platform that helps businesses manage customer data, automate processes, and improve service, marketing, and

sales operations. It provides point-and-click tools as well as programmatic capabilities (like Apex and Flows) to build custom business solutions.

Custom Objects:-

Objects in Salesforce are like tables in a database. Custom Objects are created to store specific data. Example: Customer Stores customer info Product Stores product details Order Stores orders

Tabs:-

Tabs are used to display object data in the Salesforce UI. Example: A tab for Product_c allows users to easily view and manage products.

Custom App:-

An App in Salesforce is a collection of tabs grouped together for a specific business purpose.

Profiles:-

Profiles define what a user can see, do, and edit in Salesforce. It controls object permissions, field access, and more.

Roles:-

Roles control the data visibility in Salesforce's role hierarchy. It's used for sharing settings and reporting. Permission Sets:- Permission Sets grant additional permissions to users without changing their profile.

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Validation Rules:-

Validation Rules ensure data entered meets business criteria.

Example:

- Email must contain @gmail.com
- Stock cannot be negative

Email Templates:-

Predefined formats for sending emails to customers or users.

Example:

- "Order Confirmation" template

Email Alerts:-

Email Alerts are actions in Flows or Workflow Rules that send emails using predefined templates.

Example: When a loyalty level changes, an email is sent to the customer.

Flows:-

Flows automate business logic without code. They can create, update, or send notifications.

Example:

- Flow triggers email alerts on new order

Apex:-

Apex is Salesforce's object-oriented programming language. It allows developers to write custom logic.

Example Triggers:

- Update Total_Amount _c in orders
- Reduce inventory stock

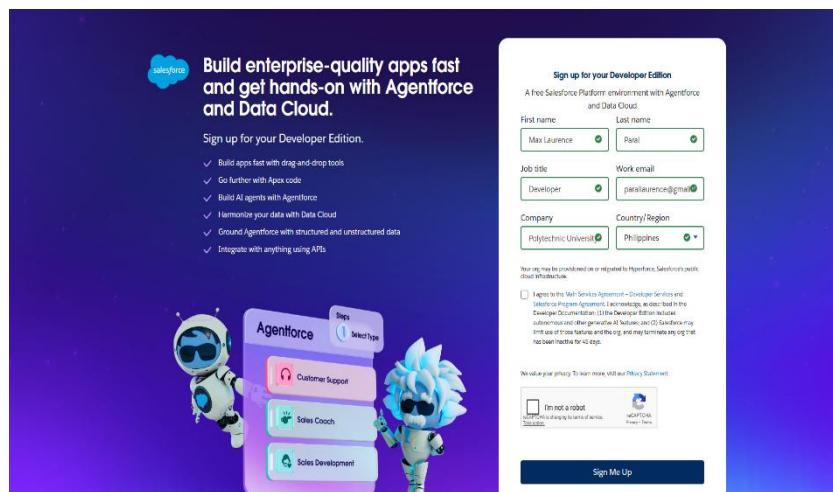
DETAILED EXECUTION OF PROJECT PHASES

1. Developer Org Setup

- A Salesforce Developer Org was created using

<https://developer.salesforce.com/signup>

- The account was verified, password set, and access was granted to the Salesforce Setup page.



2. Custom Object Creation

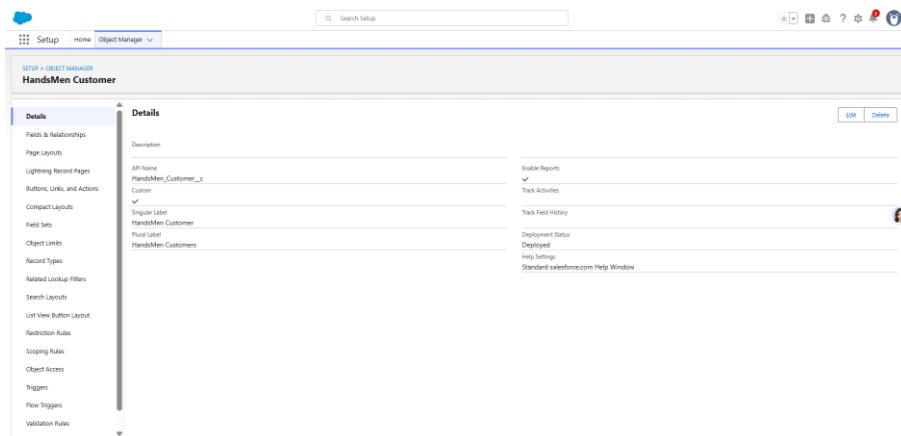
Five custom objects were created to store business-critical data:

- HandsMen Customer - Stores customer info like email, phone, loyalty status.
- HandsMen Product - Stores product catalog details like SKU, price, and stock.
- HandsMen Order - Stores orders placed by customers, including quantity and status.
- Inventory - Tracks stock quantity and warehouse location.

- Marketing Campaign - Stores promotional campaigns and scheduling.

Steps followed:

- Navigated to Setup Object Manager Create Custom Object
- Provided label, name, and enabled reports/search
- Saved and created Tabs for each object



DEFINING PROJECT SCOPE AND OBJECTIVES

DESIGN DATA MODEL AND SECURITY MODEL

Data Architecture:

Enhanced standard objects: Account, Contact, Opportunity

Custom objects: Product__c (item details), Inventory__c (stock levels with warehouse location mapping), Loyalty_Tier__c (tier definitions: Silver, Gold, Platinum) **Security Framework:**

Role Hierarchy reflecting organizational structure (CEO → Sales Manager → Sales Representatives, Warehouse Manager → Warehouse Staff)

Profile-based object-level access control

Permission sets for specialized privilege allocation (e.g., loyalty tier management)

STAKEHOLDERS MAPPING

Executive Sponsor: Chief Executive Officer

Primary User Groups: Sales Team, Customer Service Representatives, Warehouse Management

Technical Support: System Administrator (ongoing maintenance)

Implementation Team: Business Analyst, Salesforce Developer/Administrator

EXECUTION ROADMAP

The project followed a structured, phased methodology:

Phase 1: Planning and Design (Completed)

Phase 2: Core System Development (Backend & Automation)

Phase 3: User Interface and Experience Configuration

Phase 4: Data Migration, Comprehensive Testing, and Security Implementation

Phase 5: Production Deployment and Knowledge Transfer

PHASE 2: SALESFORCE DEVELOPMENT - BACKEND & CONFIGURATIONS

ENVIRONMENT SETUP & DEVOPS WORKFLOW

A dedicated Salesforce Developer Edition (Dev Hub) environment was established.

The DevOps workflow incorporated:

Developer sandbox for active development

User Acceptance Testing (UAT) sandbox for validation

Change Sets for controlled deployment between environments

CUSTOMIZATION OF OBJECTS, FIELDS, VALIDATION RULES, AND AUTOMATION

Objects & Fields: Developed custom objects and fields according to the approved data model.

Critical fields included: `Loyalty_Points__c` on Contact object

`Units_In_Stock__c` on Inventory object

`Order_Status__c` on Opportunity object

Validation Rules: Implemented a validation rule on the Opportunity object preventing closure as "Won" without associated Opportunity Line Items.

Figure 1: Validation Rule ensuring product association before deal closure Automation (Record-Triggered Flows):

Order Confirmation Flow: Activates upon Opportunity stage transition to "Closed Won." Generates personalized email to customer contacts with comprehensive order details.

Loyalty Tier Update Flow: Executes post-Opportunity win. Calculates customer lifetime value and automatically updates `Loyalty_Points__c` and `Loyalty_Tier__c` fields.

Low Stock Alert Flow: Triggers on Inventory record creation or modification. When `Units_In_Stock__c` falls below threshold (5 units), automatically notifies Warehouse Manager group via email.

Figure 2: Low Stock Alert Flow diagram showing decision logic and email action

APEX CLASSES, TRIGGERS, AND ASYNCHRONOUS APEX

Apex Scheduler (Asynchronous Apex): Developed and scheduled the

`ScheduledBulkOrderProcessor` class for daily midnight execution. This class:

Queries all daily closed orders

Updates `Total_Daily_Revenue__c` on summary object

Adjusts related `Inventory__c` records

Figure 3: Apex Scheduler class code snippet demonstrating execute method logic

PHASE 3: UI/UX DEVELOPMENT & CUSTOMIZATION

LIGHTNING APP CONFIGURATION

Created "HandsMen Threads Operations" Lightning App via App Manager, consolidating relevant tabs (Accounts, Contacts, Opportunities, Products, Inventory) for optimized user experience.

PAGE LAYOUTS & DYNAMIC FORMS

Enhanced Opportunity Lightning Record Page using Dynamic Forms:

Prominent placement of critical fields (`Order_Status__c`, `Loyalty_Tier__c`)

Strategic organization of less frequently used fields to reduce interface clutter

USER MANAGEMENT

Configured organizational structure through:

Standardized Profiles (Standard User, System Administrator)

Role Hierarchy implementation

Specialized Permission Sets for warehouse staff (Inventory object access and related reports)

REPORTS AND DASHBOARDS

Operational Reports:

Daily Sales Performance

Low Stock Alert Reporting

Customer Loyalty Tier Analysis

Executive Dashboard: "Business Operations" dashboard featuring:

Sales performance versus targets

Real-time low stock monitoring gauge

Customer loyalty tier distribution

Top customer identification

Figure 4: Business Operations Dashboard providing comprehensive business intelligence

PHASE 4: DATA MIGRATION, TESTING & SECURITY

DATA LOADING METHODOLOGY

Initial Data Load: Data Import Wizard for Accounts, Contacts, and Products

Bulk Data Operations: Data Loader for large-volume data and record updates (Inventory)

DATA INTEGRITY AND SECURITY PROTOCOLS

Duplicate Management:

Activated standard matching and duplicate rules on Contact object Prevention of

duplicate customer records using email and last name criteria **Access Control:**

Implemented security model from Phase 1 planning

Ensured role-appropriate data visibility and editing capabilities

TESTING METHODOLOGY AND VALIDATION

Comprehensive testing strategy executed with documented test cases including preconditions, test steps, expected results, and actual results with visual evidence.

Sample Test Case Documentation:

Feature: Low Stock Alert Flow

Test Case: Verify email notification on stock threshold breach - Precondition: Inventory record for "Classic Polo Shirt" contains 10 units - **Test Execution:** 1. Navigated to "Classic Polo Shirt" Inventory record 2. Modified 'Units_In_Stock__c' from 10 to 4 3.

Saved record modifications - **Expected Outcome:** Immediate email notification to Warehouse Manager group - **Validation Result:** PASS - Confirmed email receipt upon record save

Figure 5: Warehouse Manager email notification confirmation

Feature: Scheduled Bulk Order Update

Test Case: Validate scheduler execution and inventory updates - Precondition: Multiple Opportunities closed as "Won" during business day - **Test Execution:** 1. Scheduled Apex class execution 2. Verified 'Total_Daily_Revenue__c' on summary object postexecution 3. Confirmed inventory level adjustments for sold products - **Expected Outcome:** Accurate revenue summation and inventory reduction - **Validation Result:** PASS - All calculations and updates performed correctly

Figure 6: Scheduled job execution confirmation via debug logs

PHASE 5: DEPLOYMENT, DOCUMENTATION & MAINTENANCE

DEPLOYMENT STRATEGY

Production deployment from UAT sandbox utilized Change Sets methodology. All components (custom objects, fields, flows, Apex classes) underwent rigorous validation before deployment.

SYSTEM MAINTENANCE AND MONITORING FRAMEWORK

Performance Monitoring:

Salesforce built-in limits and log monitoring

Daily business metric review via "Business Operations" dashboard **Change**

Management:

Structured process for minor change requests (new fields, flow modifications) Sandbox development and Change Set deployment protocol

TROUBLESHOOTING METHODOLOGY

Systematic approach to issue resolution:

Reproduction: Replicate issue in sandbox environment

Investigation: Analyze Flow Interviews for workflow failures; Review Apex debug logs for code exceptions

Resolution: Implement fixes in sandbox, conduct thorough testing, deploy to production

CONCLUSION

The Salesforce CRM implementation for HandsMen Threads has successfully transformed the organization's operational capabilities. The project delivered a centralized, automated platform that effectively addresses core business challenges of data fragmentation and manual process inefficiencies. The new system has demonstrated significant value through improved data accuracy, enhanced customer engagement via automated communications, and proactive operational alerting. HandsMen Threads now operates with a scalable, intelligent CRM foundation that supports continued business growth and excellence.

FUTURE ENHANCEMENTS

Strategic opportunities for platform evolution:

Artificial Intelligence Integration: Salesforce Einstein implementation for intelligent product recommendations based on customer purchase history and behavior

Customer Service Automation: Chatbot deployment for common customer inquiries with Service Cloud integration

Enterprise System Integration: Advanced ERP system connectivity for bidirectional data synchronization

Marketing Automation: Marketing Cloud integration for sophisticated, multichannel campaign management leveraging customer data and loyalty tiers