

HandsMen Threads: Redefining Modern Elegance in Men's Fashion

ABSTRACT

This study presents the development of a tailored Salesforce CRM solution designed for **HandsMen Threads**, a distinguished brand specializing in premium men's fashion and custom tailoring. The system was built to enhance the company's operational workflow by integrating essential business functions—sales, inventory control, customer management, and marketing—into a single cohesive platform.

Five custom objects were created to structure business data more efficiently, while automation tools such as Record-Triggered Flows, Scheduled Flows, Email Alerts, and Apex were implemented to eliminate repetitive tasks and accelerate process execution. To ensure data integrity, validation rules and a role-based security model were added, safeguarding critical information and enforcing organizational standards.

By consolidating these capabilities within Salesforce, HandsMen Threads gains improved visibility over its operations, stronger customer engagement, and a more efficient way to manage inventory and communication. The solution establishes a scalable technological foundation that supports long-term growth and delivers a seamless, more personalized customer experience.

OBJECTIVES

- **Unified CRM Environment:** Build a centralized Salesforce system that organizes customer, order, inventory, and marketing information into one platform tailored for HandsMen Threads.
- **Automation:** Streamline essential business operations using Flows, Email Alerts, and Apex to minimize manual workload and increase efficiency.
- **Customer Engagement:** Enable personalized communication through automated order updates, loyalty notifications, and marketing campaign alerts.
- **Data Integrity:** Maintain accurate and trustworthy records with validation rules, secure access, and role-based permissions for sales, marketing, and inventory teams.
- **Scalability:** Provide a CRM framework capable of supporting future expansion and a growing customer base.
- **Inventory Control:** Strengthen monitoring with automated low-stock alerts and scheduled batch processes to keep stock levels accurate and up to date.

TECHNOLOGY DESCRIPTION

This project leverages **Salesforce**, a leading cloud-based Customer Relationship Management (CRM) platform, to create an integrated and efficient business solution for HandsMen Threads. As a

scalable cloud system, Salesforce enables the development of custom objects, automated processes, and secure data structures without requiring traditional hardware infrastructure.

Core tools utilized in this project include:

- **Record-Triggered & Scheduled Flows:** Automating repetitive tasks and ensuring timely updates.
- **Email Alerts:** Delivering real-time communication to customers and internal teams.
- **Validation Rules:** Enforcing data accuracy and consistency across records.
- **Reports & Dashboards:** Providing actionable insights into sales, inventory, and campaign performance.
- **Apex Programming:** Executing specialized functions such as batch inventory updates and complex record operations.

Salesforce's **role-based security model** ensures that sensitive information is protected by granting access only to authorized users within designated roles. With its cloud-hosted architecture, the system provides uninterrupted access across devices, allowing teams to manage operations anytime and anywhere.

Overall, the technologies and tools used in this system contribute to enhanced operational efficiency, improved data accuracy, and a more personalized experience for customers interacting with HandsMen Threads.

1. Developer Org Setup

Creating a developer org or playground in trailhead for salesforce capstone project

2. Creation of Custom Objects

Data Management - Objects

0% ^

Object - HandsMen Customer

Object - HandsMen Product

Object - HandsMen Order

Object - Inventory

Object - Marketing Campaign

3. Set the correct field on each custom objects

Data Management - Fields

0% ^

Field - Email

Field - Phone

Field - Loyalty Status

Create Lookup Relationship

Formula Fields

Create Remaining fields for the objects

4. Creation of Validation rules for Emails, Amount, and more

Data Configuration

0% ^

Validation Rules

Create Remaining Validation Rules

Data security - Profiles

0% ^

Profile - Sales

Data Security - Roles

0% ^

Role - Sales

Create Roles

Data Security - Users

0% ^

User - Niklaus

User - Kol

Create Users

Data Security - Permission Set

0% ^

Permission set - Permission_Platform_1

6. Setting up the email template and alerts

Email Template

0% ^

Create an Order Confirmation Email Template

Create Remaining Email Templates

Create an Email Alert

7. Creation of flow for the proper function of email alerts

Flows

0% ^

Create Order Confirmation Email

Create Stock Alert Email (Record-Triggered)

Create a Scheduled Flow

8. the Creation of Apex triggers and class

Automation using Apex

0% ^

Create Apex Class

Batch Jobs

0% ^

Create Batch Apex

Created Competent within the System or
the **HandsMen Threads: Elevating the Art of Sophistication in Men's Fashion**

Handsman Customer

The screenshot displays the 'HandsMen Threads' application interface. The top navigation bar includes links for 'HandsMen Threads', 'HandsMen Customers', 'HandsMen Orders', 'HandsMen Products', 'Inventories', 'Marketing Campaigns', 'Reports', 'Dashboards', 'Accounts', and 'Contacts'. The 'HandsMen Customers' section is active, showing a 'Recently Viewed' list with two items: 'niki' and 'rls'. Below this, the 'Information' form for a customer is visible. The form includes fields for 'HandsMen Customer Name' (with a red error message 'Complete this field.'), 'Email', 'Phone', 'Loyalty Status' (set to '--None--'), 'FirstName', 'LastName', and 'Total Purchases'. The 'Owner' field is set to 'Marius Jet Alyson Peñano'. At the bottom of the form are buttons for 'Cancel', 'Save & New', and 'Save'.

HandsMen Customer Name
1 niki
2 rls

Information

* HandsMen Customer Name

Complete this field.

Owner

Marius Jet Alyson Peñano

Email

Phone

Loyalty Status

--None--

FirstName

LastName

Total Purchases

Cancel

Save & New

Save

HandsMen Threads

HandsMen Customers

HandsMen Orders

HandsMen Products

Inventories

Marketing Campaigns

Reports

Dashboards

Accounts

Contacts

Search...

Star

Refresh

Help

Settings

Notifications

User

HandsMen Orders

Recently Viewed

New

Import

Change Owner

Assign Label

4 items • Updated a few seconds ago

Search this list...

Filter

Reset

Refresh

Print

Export

Import

	HandsMen Order Name	
1	<input type="checkbox"/> O-0001	
2	<input type="checkbox"/> O-0002	
3	<input type="checkbox"/> O-0003	
4	<input type="checkbox"/> O-0004	

system:token@bdf-dev-est:aws:ignoring:local.com:ignoring: /home

New HandsMen Order

* = Required Information

Information

HandsMen Order Name

Owner

HandsMen Product

Search HandsMen Products...

HandsMen Customer

Search HandsMen Customers...

Status

--None--

Quantity

Total Amount


Customer Email

Cancel

Save & New

Save

Handsman Product



HandsMen Threads

HandsMen Customers

HandsMen Orders

HandsMen Products

Inventories







Marketing Campaigns


Reports

Dashboards

Accounts

Contacts





HandsMen Products

Recently Viewed

New Import Change Owner Assign Label

2 items • Updated a few seconds ago

☐ HandsMen Product Name

1 ☐ T-shirt cloth

2 ☐ hat

https://org1am-1b2e0ebf1-dev-ed.develop.lightning.force.com/lightning/HandsMen_Products?_r=0

New HandsMen Product

* = Required Information

Information


* HandsMen Product Name

Owner

SKU

Price

Stock Quantity

 Marius Jet Alyson Peñano

Cancel

Save & New

Save