

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

Salesforce CRM Documentation

Project Overview

HandsMen Threads is a tailor-made Salesforce CRM solution crafted for a premium men's fashion brand. This application is designed to streamline custom order management, optimize inventory control, and enhance customer engagement through intelligent automation. The system utilizes custom objects, flows, validation rules, Apex triggers, and scheduled jobs to manage end-to-end operations with minimal manual intervention.

Objectives

- Automate repetitive business tasks (e.g., order confirmation, loyalty updates).
 - Enhance operational efficiency across sales, inventory, and customer service.
 - Minimize human error by enforcing data validation and process flows.
 - Provide real-time insights for decision-making through scalable architecture.
-

Phase 1: Requirement Analysis & Planning

- Identified core entities requiring tracking: customers, orders, products, inventory, and campaigns.
 - Mapped relationships using Lookup and Master-Detail fields.
 - Defined field types (Text, Currency, Picklist, Formula).
 - Documented business rules, validation logic, and automation requirements.
-

Phase 2: Salesforce Development – Backend & Configurations

- Used Object Manager to create custom objects and associated fields.
 - Developed Flows.
 - Created Apex classes.
 - Designed Email Templates.
-

Phase 3: UI/UX Development & Customization

- Added custom tabs and icons using App Manager.
 - Created tailored Page Layouts and Lightning Record Pages.
 - Integrated user-friendly validation messages.
 - Enabled smooth navigation in the Lightning Experience interface.
-

Phase 4: Data Management, Testing & Security

- Populated system with sample data.
 - Performed unit testing on Flows and Apex classes.
 - Conducted manual UI/UX testing across user roles.
 - Verified post-migration data integrity for key objects.
 - Used assertions in test classes to ensure data correctness.
 - Achieved >85% test coverage for Apex logic.
-

Phase 5: Deployment, Documentation & Maintenance

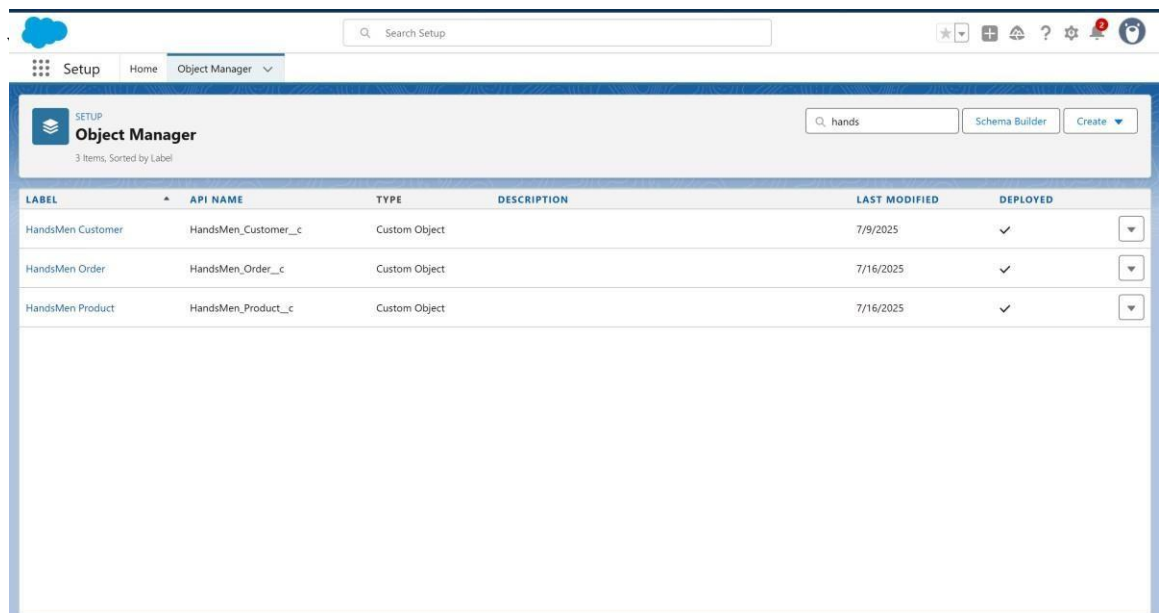
- Deployed metadata using Salesforce CLI and SFDX.
 - Initialized version control with Git.
 - Uploaded documentation and screenshots to GitHub
-

Detailed Implementation & Configuration

Data Management

Objects

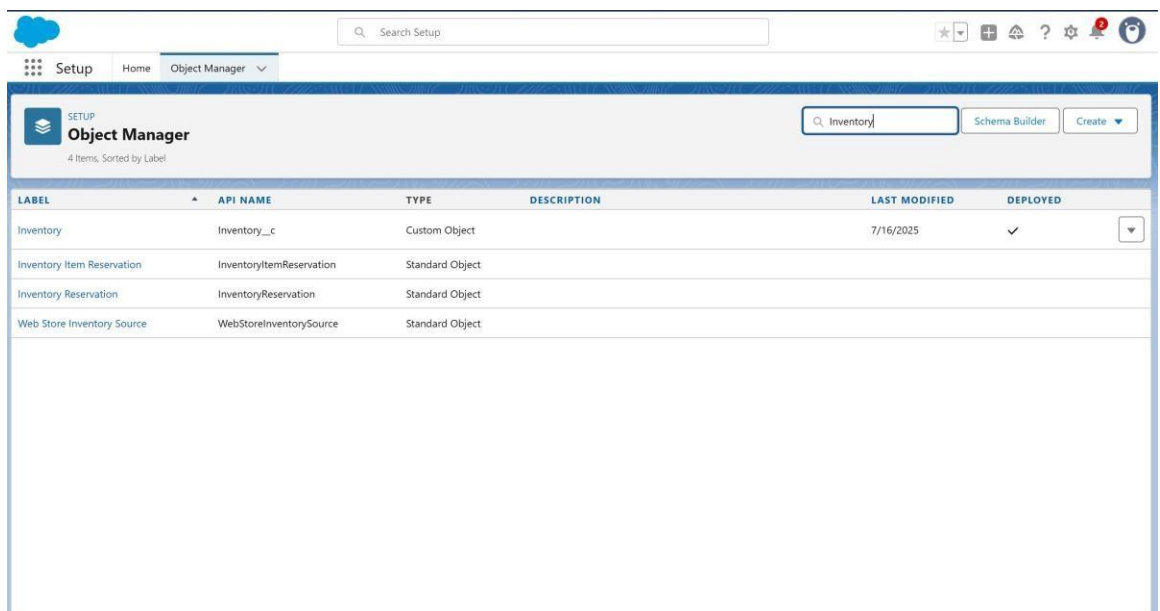
- **HandsMen_Customer__c** : Stores customer information including contact details, loyalty status, and order history, enabling personalized engagement and service tracking.
- **HandsMen_Product__c**: Captures product data like name, fabric type, price, and availability, supporting custom order creation and inventory monitoring.
- **HandsMen_Order__c**: Tracks individual customer orders, linking products, quantities, and order status, and integrates with automated confirmation and fulfillment .



The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar at the top right contains the text 'hands'. Below the navigation bar, the 'Object Manager' section is displayed with a search bar containing 'hands' and buttons for 'Schema Builder' and 'Create'. The table below lists 3 items, sorted by Label.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
HandsMen Customer	HandsMen_Customer__c	Custom Object		7/9/2025	✓
HandsMen Order	HandsMen_Order__c	Custom Object		7/16/2025	✓
HandsMen Product	HandsMen_Product__c	Custom Object		7/16/2025	✓

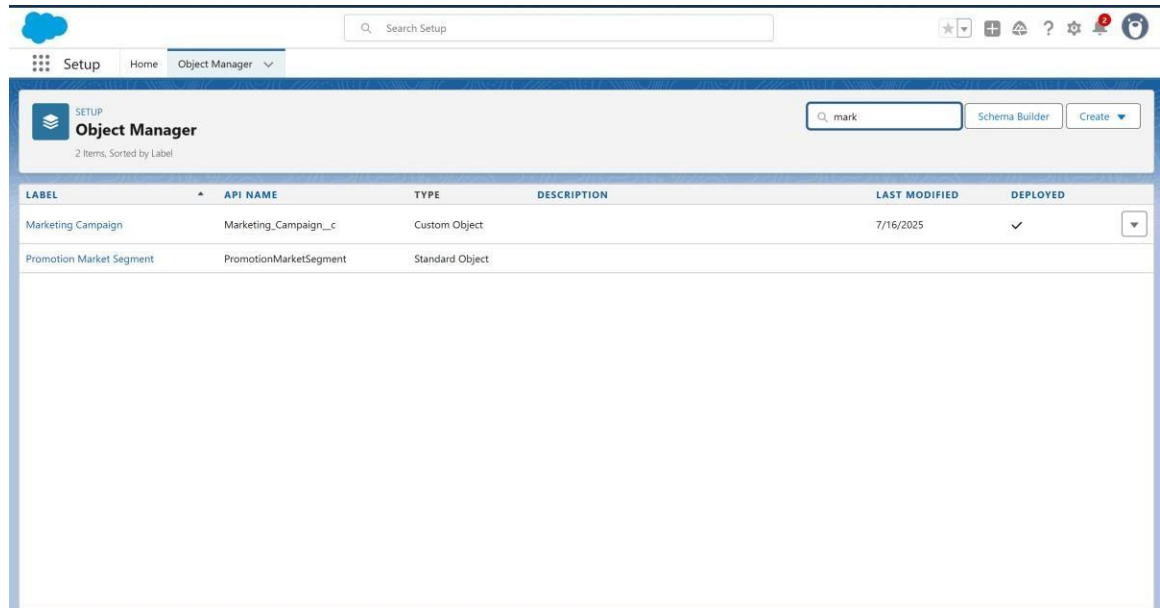
- **Inventory**: Manages stock levels of products across locations.



The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar at the top right contains the text 'Inventory'. Below the navigation bar, the 'Object Manager' section is displayed with a search bar containing 'Inventory' and buttons for 'Schema Builder' and 'Create'. The table below lists 4 items, sorted by Label.

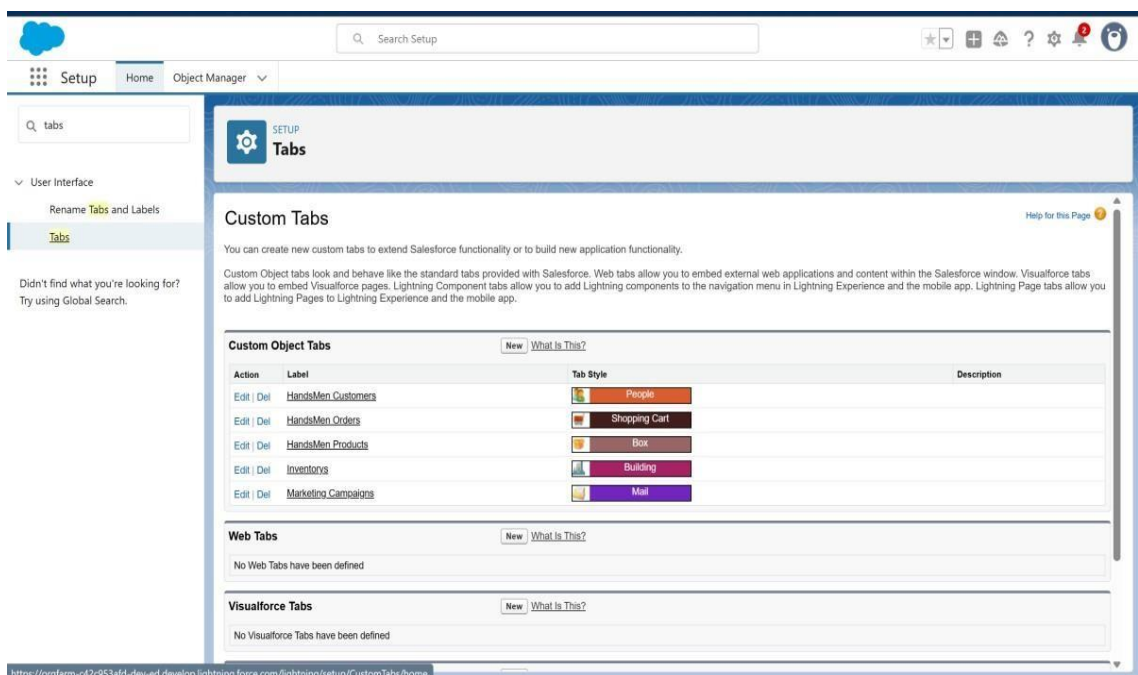
LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Inventory	Inventory__c	Custom Object		7/16/2025	✓
Inventory Item Reservation	InventoryItemReservation	Standard Object			
Inventory Reservation	InventoryReservation	Standard Object			
Web Store Inventory Source	WebStoreInventorySource	Standard Object			

- **Marketing_Campaign__c** : Represents promotional campaigns with fields for campaign type, duration, and target audience, enabling marketing performance tracking and outreach automation.



Tabs

- **Tab - HandsMen Customer:** A custom navigation tab that provides users with quick access to the HandsMen_Customer__c records, streamlining customer management within the app.



App Manager

- **App - HandsMen Threads:** A custom Salesforce Lightning app that centralizes access to all HandsMen CRM components like customers, orders, products, and inventory for seamless operations.

The screenshot shows the 'App Settings' section of the Salesforce Lightning App Builder. The 'App Details & Branding' tab is selected, showing fields for App Name, Developer Name, Description, App Image, and Primary Color Hex Value. The App Name is 'HandsMen Threads', the Developer Name is 'HandsMen_Threads', and the Description is '"Men Threads" likely refers to a project or brand focused on men's fashion, specifically'. The App Image is a placeholder image of a person in a suit. The Primary Color Hex Value is '#0070D2'. There is also an 'Org Theme Options' checkbox and an 'App Launcher Preview' section showing the app's icon and name.

App Settings

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

* App Name [?]
HandsMen Threads

* Developer Name [?]
HandsMen_Threads

Description [?]
"Men Threads" likely refers to a project or brand focused on men's fashion, specifically

App Branding

Image [?]
[Image Placeholder]

Primary Color Hex Value [?]
#0070D2

Org Theme Options
☐ Use the app's image and color instead of the org's custom theme

App Launcher Preview

HandsMen Threads
"Men Threads" likely refers to a project or brand focu...

Fields

- **Fields -HandsMen Customer:** Includes custom fields such as Name, Email, Phone, Loyalty_Status_c, and Preferred_Style_c to capture detailed customer profiles for tailored service delivery.

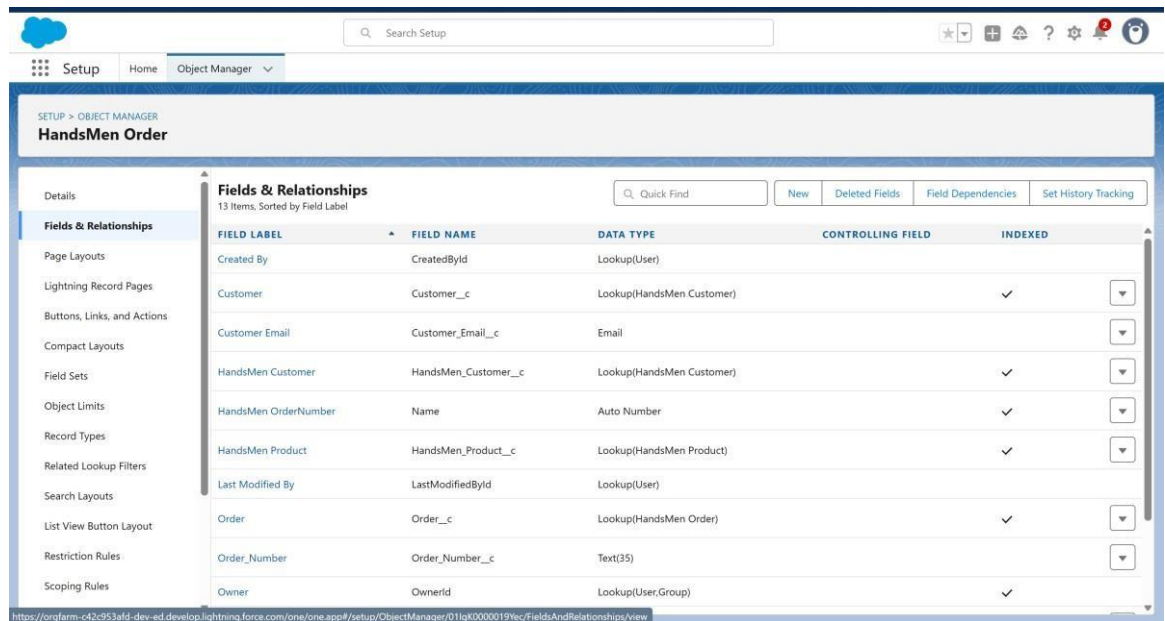
The screenshot shows the 'Setup' page in Salesforce, specifically the 'Object Manager' section for the 'HandsMen Customer' object. The 'Fields & Relationships' tab is selected, showing a list of fields and their relationships. The fields are sorted by Field Label. The list includes fields like Full_Name_c, FullName_c, HandsMen Customer Name, Last Modified By, LastName, Loyalty Status, Name, Owner, Phone, and Total Purchases.

Fields & Relationships

14 items, Sorted by Field Label

Field Label	Field Name	Field Type	Relationship
Full_Name_c	Full_Name_c_c	Formula (Text)	
FullName	FullName_c	Formula (Text)	
HandsMen Customer Name	Name	Text(80)	✓
Last Modified By	LastModifiedById	Lookup(User)	
LastName	LastName_c	Text(50)	
Loyalty Status	Loyalty_Status_c	Picklist	
Name	Name_c	Text(80)	
Owner	OwnerId	Lookup(User,Group)	✓
Phone	Phone_c	Phone	
Total Purchases	Total_Purchases_c	Number(16, 2)	

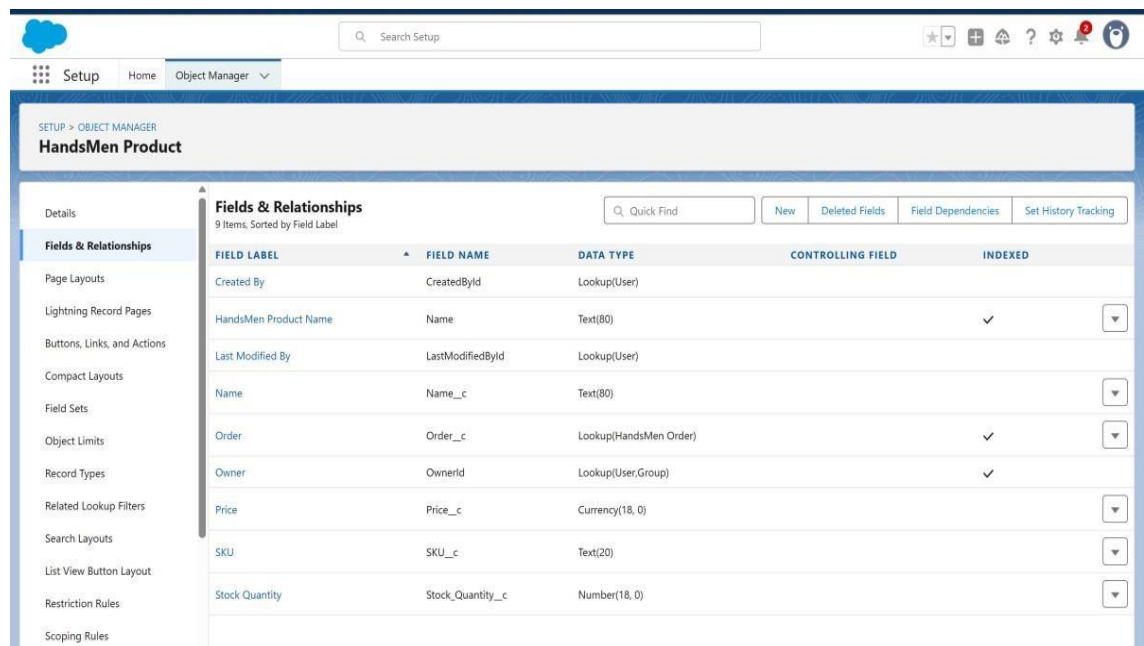
- **Fields -HandsMen Order:** Contains fields like Order_Date_c, Product_c (lookup), Quantity_c, Total_Amount_c, and Order_Status_c to manage and track customer purchase transactions.



The screenshot shows the Salesforce Setup interface for the 'HandsMen Order' object. The 'Fields & Relationships' section is active, displaying a list of 13 fields. The table below represents the data shown in the screenshot.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Customer	Customer__c	Lookup(HandsMen Customer)		✓
Customer Email	Customer_Email__c	Email		
HandsMen Customer	HandsMen_Customer__c	Lookup(HandsMen Customer)		✓
HandsMen OrderNumber	Name	Auto Number		✓
HandsMen Product	HandsMen_Product__c	Lookup(HandsMen Product)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Order	Order__c	Lookup(HandsMen Order)		✓
Order Number	Order_Number__c	Text(35)		
Owner	OwnerId	Lookup(User,Group)		✓

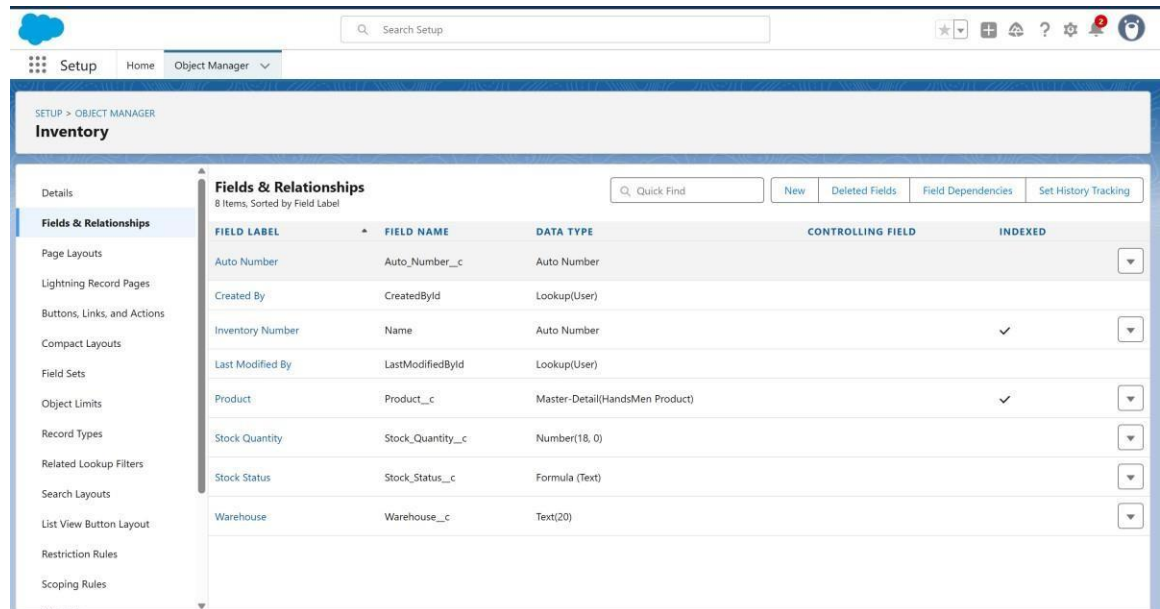
- **Fields -HandsMen Product:** Includes fields such as Product_Name_c, Fabric_Type_c, Price_c, Size_c, and Availability_Status_c to define product specifications and support inventory tracking.



The screenshot shows the Salesforce Setup interface for the 'HandsMen Product' object. The 'Fields & Relationships' section is active, displaying a list of 9 fields. The table below represents the data shown in the screenshot.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
HandsMen Product Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Text(80)		
Order	Order__c	Lookup(HandsMen Order)		✓
Owner	OwnerId	Lookup(User,Group)		✓
Price	Price__c	Currency(18, 0)		
SKU	SKU__c	Text(20)		
Stock Quantity	Stock_Quantity__c	Number(18, 0)		

- **Fields- Inventory:** Comprises fields like Product_c (lookup), Stock_Quantity_c, Stock_Status_c, and Warehouse_Location_c to monitor stock levels and manage supply efficiently.



SETUP > OBJECT MANAGER

Inventory

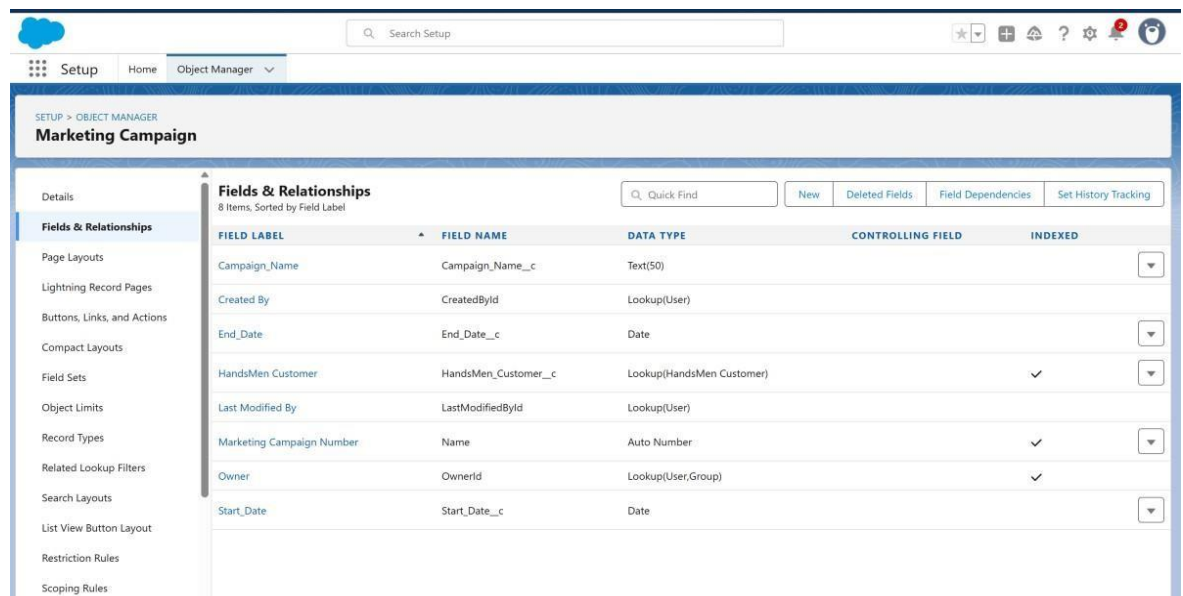
Details

Fields & Relationships 8 Items, Sorted by Field Label

Q, Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Auto Number	Auto_Number__c	Auto Number		
Created By	CreatedById	Lookup(User)		
Inventory Number	Name	Auto Number		✓
Last Modified By	LastModifiedById	Lookup(User)		
Product	Product__c	Master-Detail(HandsMen Product)		✓
Stock Quantity	Stock_Quantity__c	Number(18, 0)		
Stock Status	Stock_Status__c	Formula (Text)		
Warehouse	Warehouse__c	Text(20)		

- **Fields- Marketing Campaign:** Includes fields like Campaign_Name_c, Start_Date_c, End_Date_c, Target_Audience_c, and Campaign_Type_c to define and track marketing initiatives.



SETUP > OBJECT MANAGER

Marketing Campaign

Details

Fields & Relationships 8 Items, Sorted by Field Label

Q, Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Campaign Name	Campaign_Name__c	Text(50)		
Created By	CreatedById	Lookup(User)		
End Date	End_Date__c	Date		
HandsMen Customer	HandsMen_Customer__c	Lookup(HandsMen Customer)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Marketing Campaign Number	Name	Auto Number		✓
Owner	OwnerId	Lookup(User,Group)		✓
Start Date	Start_Date__c	Date		

Data Configuration

- **Validation Rules - HandsMen Order:** Ensures data accuracy by enforcing rules such as preventing negative quantities or missing product references during order creation.

The screenshot shows the Salesforce Setup interface for the 'HandsMen Order' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main content area is titled 'HandsMen Order Validation Rule' and includes a 'Back to HandsMen Order' link. Below this is a 'Validation Rule Detail' section with a table of rule information.

Validation Rule Detail		Active
Rule Name	Total_Amount	✓
Error Condition Formula	Total_Amount__c <= 0	
Error Message	Please Enter Correct Amount	Error Location: Total Amount
Description		
Created By	DUPAKUNTILA SAI PRANEETHA, 7/14/2025, 11:55 PM	Modified By: DUPAKUNTILA SAI PRANEETHA, 7/16/2025, 7:14 AM

- **Validation Rules - HandsMen Customer:** Implements checks to ensure required fields like Email and Phone are entered correctly and validates the uniqueness or format of customer data.

:

The screenshot shows the Salesforce Setup interface for the 'HandsMen Customer' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main content area is titled 'HandsMen Customer Validation Rule' and includes a 'Back to HandsMen Customer' link. Below this is a 'Validation Rule Detail' section with a table of rule information.

Validation Rule Detail		Active
Rule Name	Email	✓
Error Condition Formula	NOT CONTAINS(Email__c, "@gmail.com")	
Error Message	Please fill Correct Gmail	Error Location: Top of Page
Description		
Created By	DUPAKUNTILA SAI PRANEETHA, 7/15/2025, 12:08 AM	Modified By: DUPAKUNTILA SAI PRANEETHA, 7/16/2025, 7:18 AM

- **Validation Rules Inventory:** Enforces rules to prevent invalid stock entries, such as disallowing Stock_Quantity_c from being zero or negative, ensuring accurate inventory tracking.

The screenshot shows the Salesforce Setup interface for the 'Inventory Validation Rule'. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main content area is titled 'Inventory Validation Rule' and includes a 'Back to Inventory' link. Below this is the 'Validation Rule Detail' section, which shows the rule name 'Stock_Quantity', its status as 'Active', and the error condition formula 'Stock_Quantity_c <= 0'. The error message is 'the inventory count is never less than zero.' and the error location is 'Top of Page'. The rule was created by 'DUPAKUNTALA SAI PRANEETHA' on 7/15/2025 at 12:03 AM and was modified by the same user on 7/15/2025 at 6:44 AM. There are 'Edit' and 'Clone' buttons for both the rule and the user.

Data Security

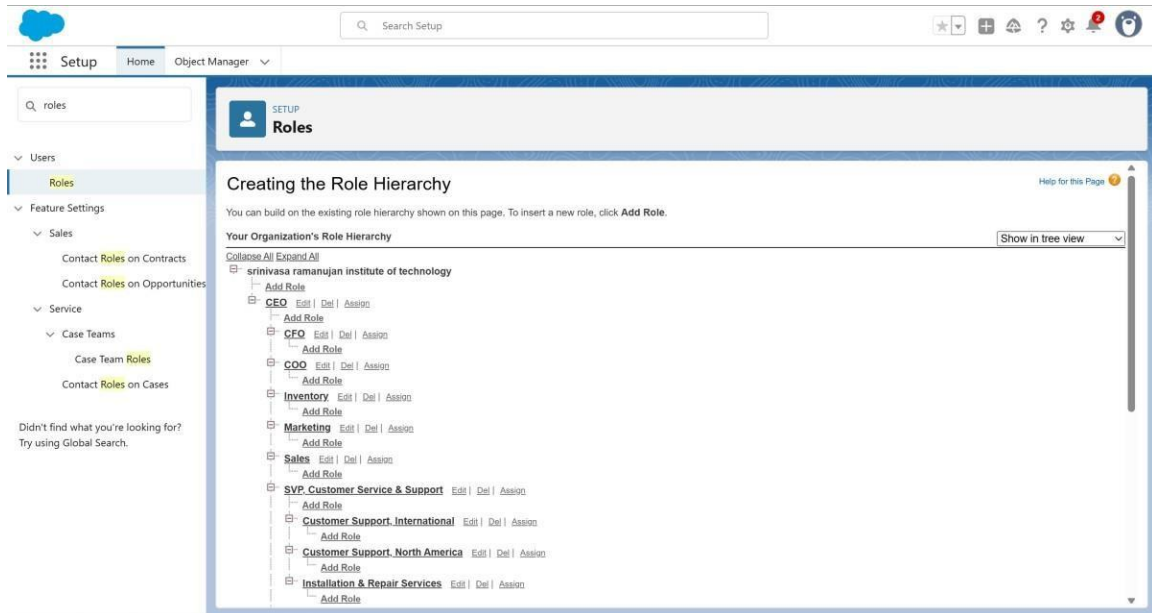
Profiles

- **Profile – Sales:** Defines permissions for sales users, granting access to relevant objects like Orders and Customers while restricting administrative settings and sensitive data.

The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The left sidebar contains a navigation menu with options like Users, Profiles, and a search bar. The main content area is titled 'SETUP Profiles' and includes a search bar. Below this is the 'Custom Object Permissions' section, which shows a table of permissions for various objects. The table has columns for 'Basic Access' (Read, Create, Edit, Delete) and 'Data Administration' (View All Records, Modify All Records, View All Fields). The objects listed are HandsMen Customers, HandsMen Orders, HandsMen Products, Inventories, and Marketing Campaigns. The 'Session Settings' section shows the 'Session Times Out After' set to '2 hours of inactivity' and the 'Session Security Level Required at Login' set to 'None'. The 'Password Policies' section shows settings for password expiration (90 days), password history (3 passwords remembered), minimum password length (8), password complexity requirement (Must include alpha and numeric characters), password question requirement (Cannot contain password), and maximum invalid login attempts (5).

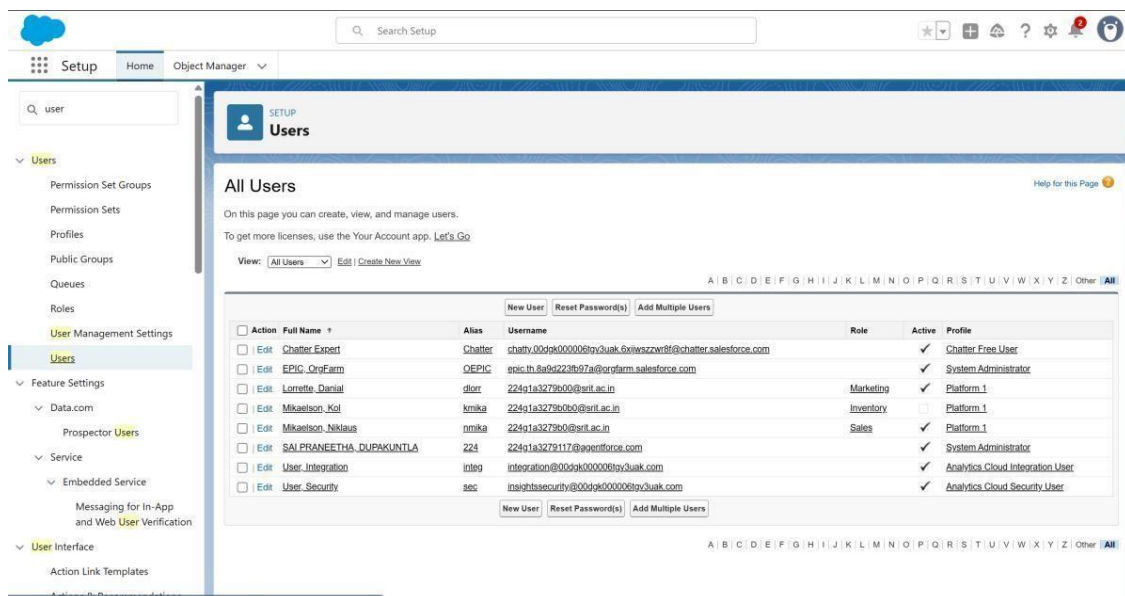
Roles

Role – Sales, Inventory Manager and Marketing Manager: Defines a role hierarchy to control record visibility and reporting structure, aligning user access with responsibilities in sales, inventory, and marketing operations.



Users

- **User – Niklaus, Kol, Lorretta Daniel:** Sample users representing different roles (e.g., Sales, Inventory Manager, Marketing Manager) used for testing role-based access and CRM functionality.



Permission Sets

- **Permission set - Permission_Platform_1** :Grants additional object-level and field-level access beyond profile limits, enabling specific users to perform actions like editing inventory or viewing campaign data.

The screenshot displays the Salesforce Setup interface for the 'Permission_Platform_1' permission set. The left sidebar shows the navigation menu with 'Permission Sets' selected. The main content area includes a search bar, a 'Find Settings...' button, and tabs for 'Clone', 'Edit Properties', 'Manage Assignments', and 'View Summary'. The 'Permission Set Overview' section provides details about the permission set, including its description, license, session activation requirements, and the number of permission set groups added. The 'Apps' section lists various settings such as 'Assigned Apps', 'Assigned Connected Apps', 'Object Settings', 'App Permissions', 'Apex Class Access', 'Visualforce Page Access', and 'External Data Source Access'.

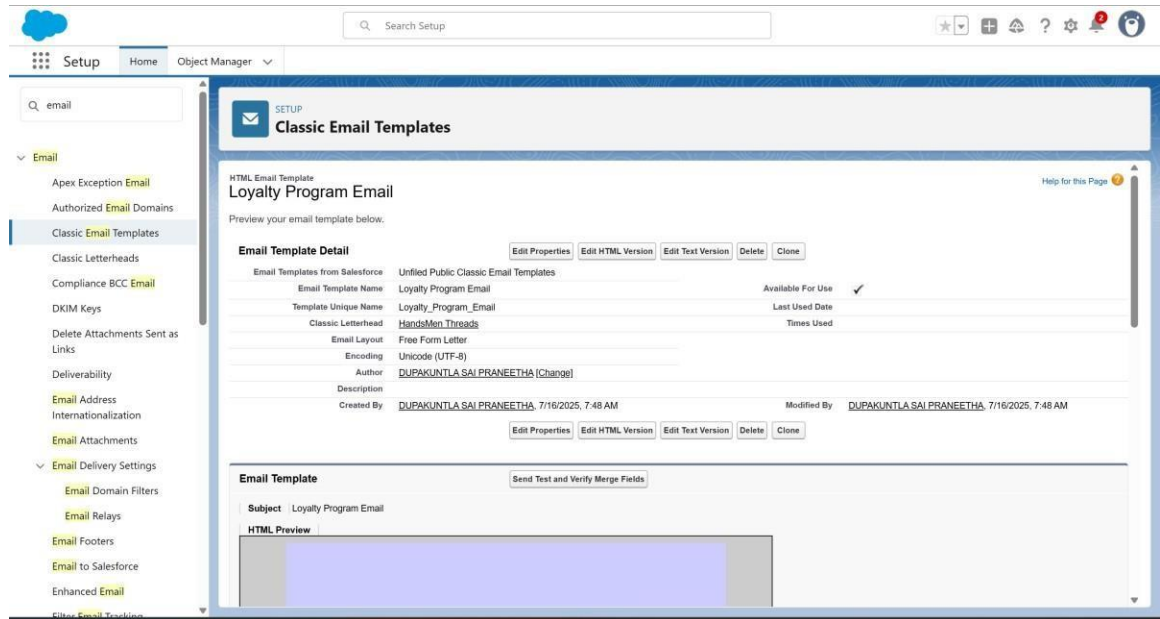
Email Templates & Alerts

The screenshot displays the Salesforce Setup interface for 'Classic Email Templates'. The left sidebar shows the navigation menu with 'Email' selected. The main content area includes a search bar and a 'Classic Email Template Availability' section. Below this, there is a table listing email templates. The table has columns for 'Action', 'Email Template Name', 'Template Type', 'Available For Use', 'Description', 'Author', and 'Last Modified Date'. The table shows one template named 'Order Confirmation Email' with a template type of 'HTML' and is marked as 'Available For Use'.

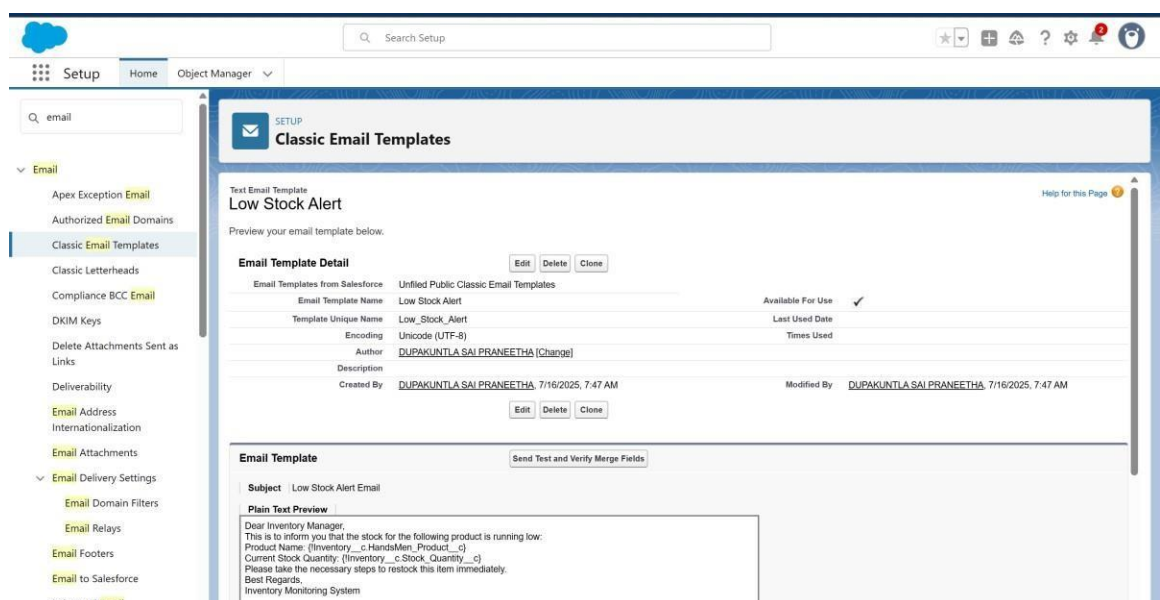
Action	Email Template Name	Template Type	Available For Use	Description	Author	Last Modified Date
Edit Del	Order Confirmation Email	HTML	✓		224	7/16/2025

- **Order Confirmation Email Template:** A pre-designed email template automatically sent to customers after order placement, summarizing order details and confirming successful submission

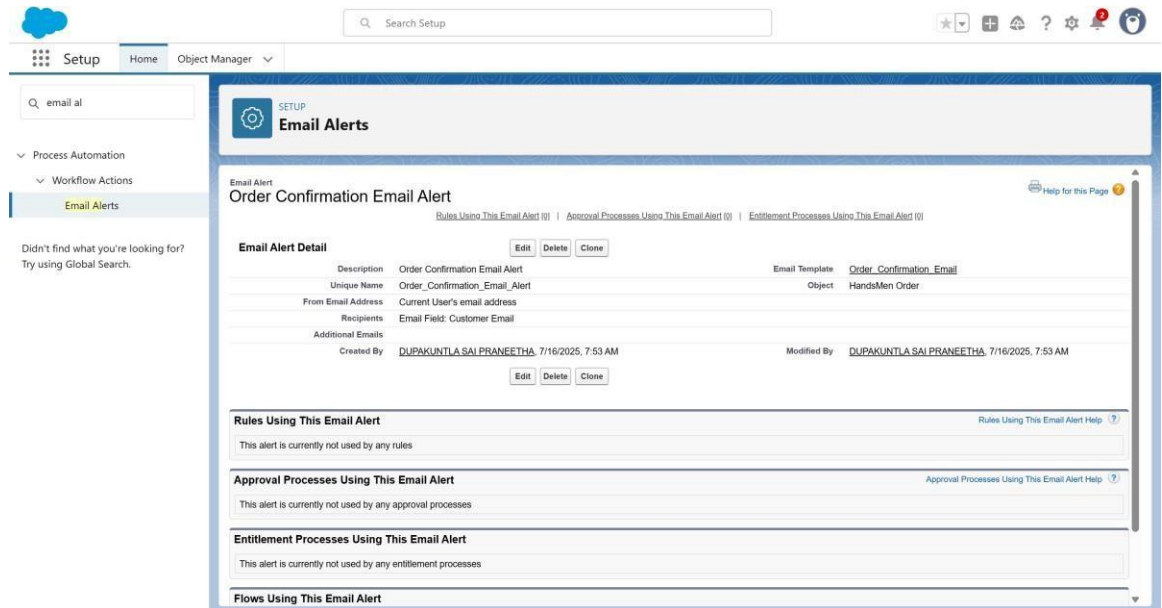
- **Loyalty Email Template:** An automated email template used to notify customers about their updated loyalty status, rewards, or exclusive offers based on their purchase history.



- **Low stock Alert Email Template:** An email template triggered when inventory levels fall below a defined threshold, notifying relevant managers to restock the product promptly

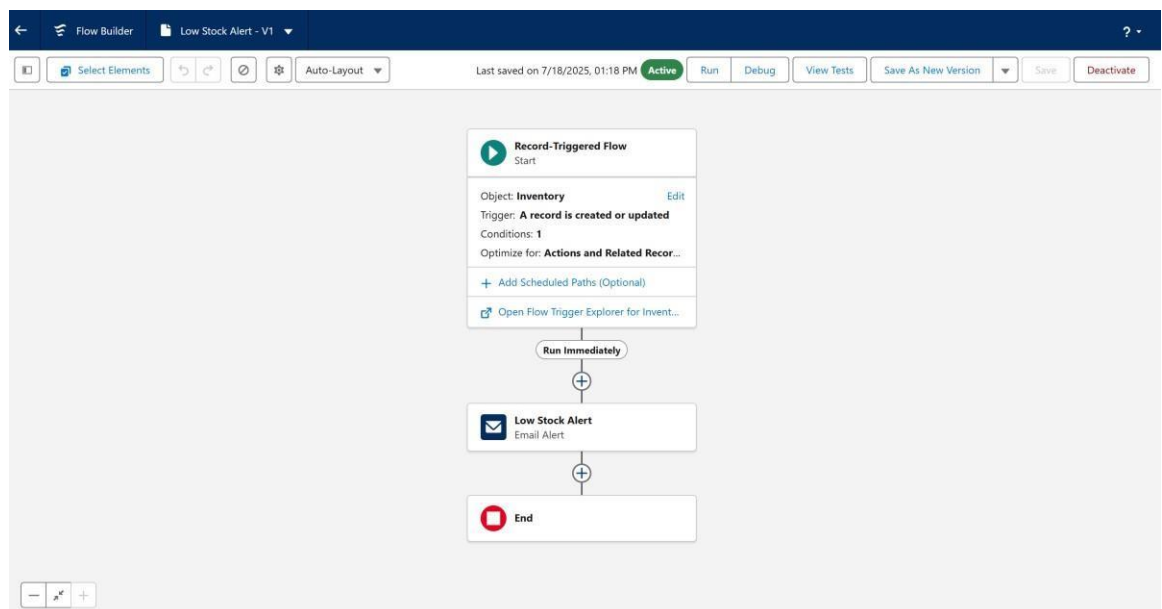


- **Email Alert for Order Confirmation Email:** A configured alert that triggers the Order Confirmation Email Template upon successful order creation, ensuring timely communication with customers.

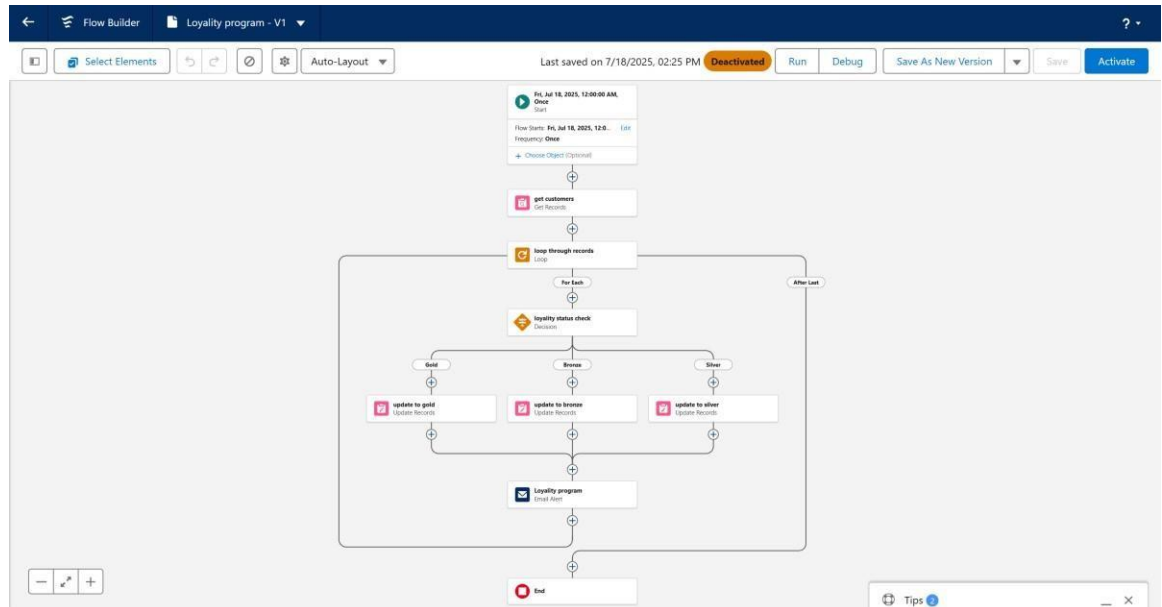


Flows

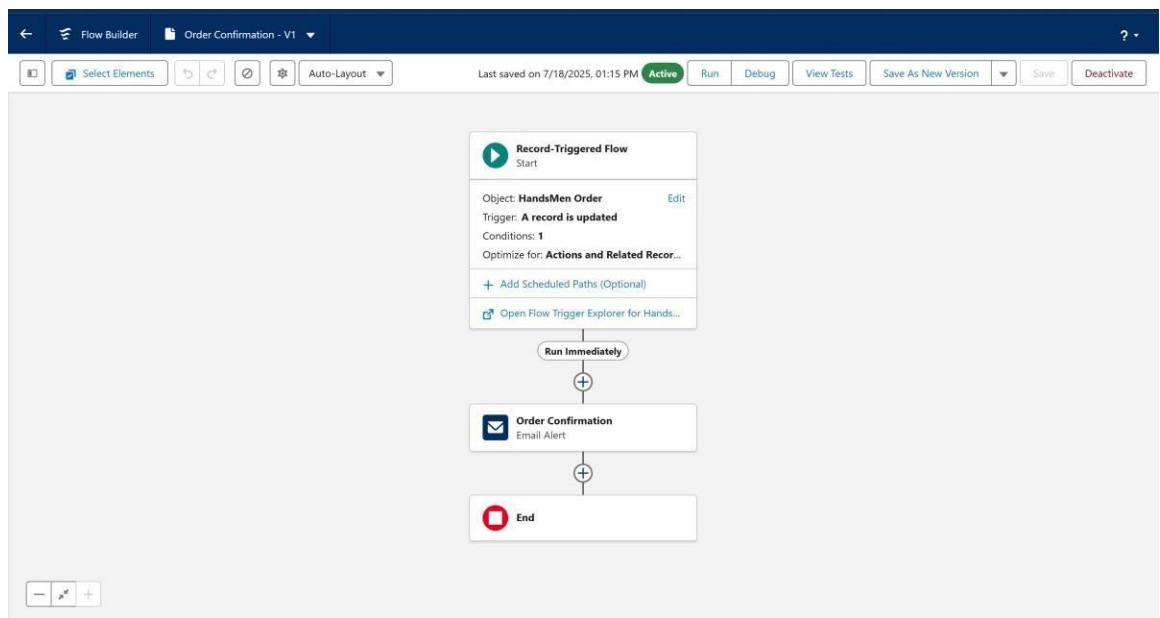
- **Stock Alert Flow:** Triggers alerts when inventory levels fall below a threshold.



- **Loyalty Status Flow:** An automated Salesforce Flow that updates a customer's loyalty tier based on their purchase history and predefined criteria, enhancing customer engagement.

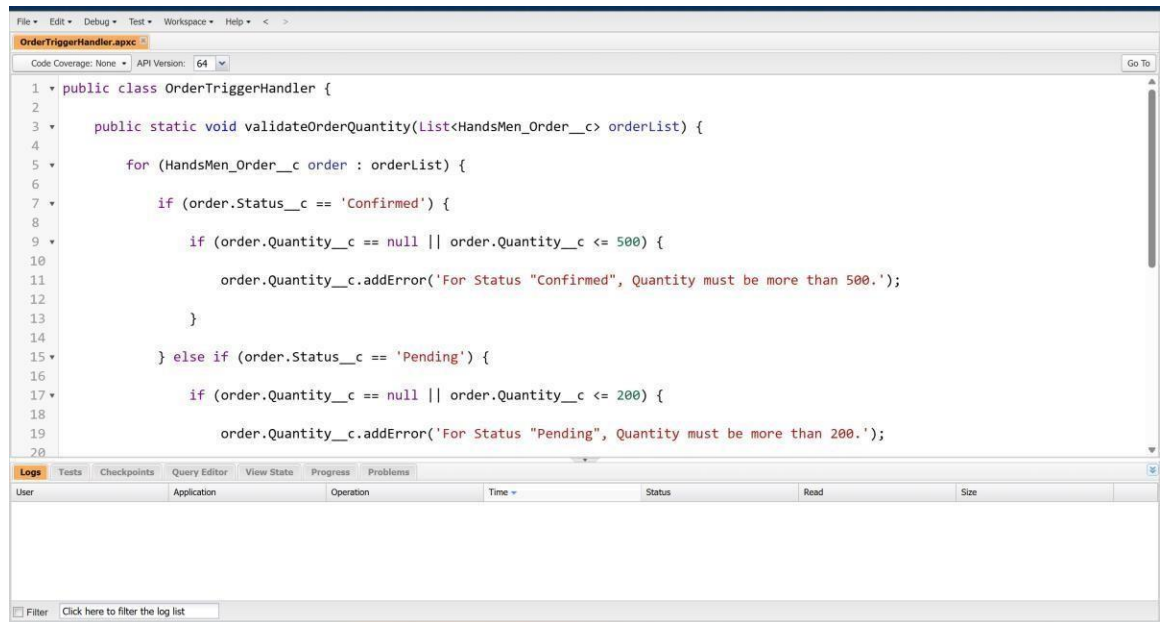


- **Create Order Confirmation Email:** A Flow that generates and sends a confirmation email to customers immediately after an order is placed, ensuring real-time communication and transparency.



Automation using Apex

- **OrderTriggerHandler Apex Class:** A reusable Apex class that encapsulates the business logic for order-related triggers, ensuring clean, modular, and maintainable automation.



```
File • Edit • Debug • Test • Workspace • Help • < • >
OrderTriggerHandler.apex
Code Coverage: None • API Version: 64 • Go To

1 public class OrderTriggerHandler {
2
3     public static void validateOrderQuantity(List<HandsMen_Order__c> orderList) {
4
5         for (HandsMen_Order__c order : orderList) {
6
7             if (order.Status__c == 'Confirmed') {
8
9                 if (order.Quantity__c == null || order.Quantity__c <= 500) {
10
11                     order.Quantity__c.addError('For Status "Confirmed", Quantity must be more than 500.');

Logs Tests Checkpoints Query Editor View State Progress Problems



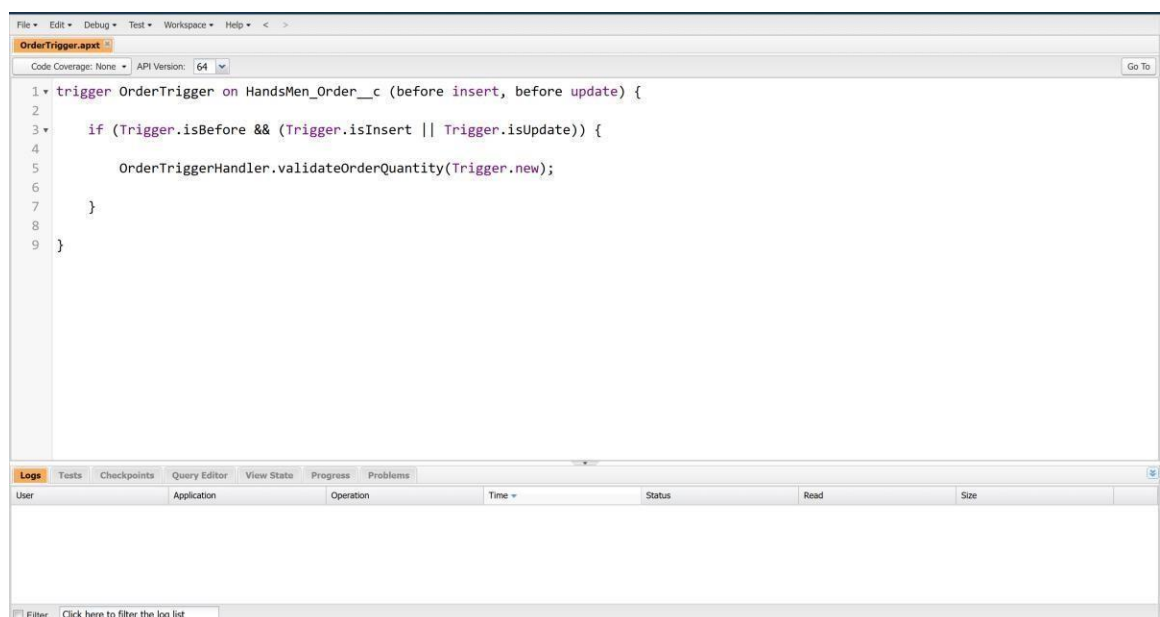
| User | Application | Operation | Time | Status | Read | Size |
|------|-------------|-----------|------|--------|------|------|
|------|-------------|-----------|------|--------|------|------|



Filter Click here to filter the log list


```

- **OrderTrigger Apex Trigger:** An Apex trigger on the HandsMen_Order__c object that invokes the OrderTriggerHandler to automate actions like validation and email notifications during order processing.



```
File • Edit • Debug • Test • Workspace • Help • < • >
OrderTrigger.apex
Code Coverage: None • API Version: 64 • Go To

1 trigger OrderTrigger on HandsMen_Order__c (before insert, before update) {
2
3     if (Trigger.isBefore && (Trigger.isInsert || Trigger.isUpdate)) {
4
5         OrderTriggerHandler.validateOrderQuantity(Trigger.new);
6
7     }
8
9 }
```

Logs Tests Checkpoints Query Editor View State Progress Problems

User	Application	Operation	Time	Status	Read	Size
------	-------------	-----------	------	--------	------	------

Filter Click here to filter the log list

BatchJob

InventoryBatchJob: An Apex batch job that processes inventory records in bulk to update stock statuses, perform audits, or trigger low stock alerts at scheduled intervals.

File • Edit • Debug • Test • Workspace • Help • < >

InventoryBatchJob.apxc

Code Coverage: None • API Version: 64

Go To

1 global class InventoryBatchJob implements Database.Batchable<SObject>, Schedulable {
2
3 global Database.QueryLocator start(Database.BatchableContext BC) {
4
5 return Database.getQueryLocator(
6
7 'SELECT Id, Stock_Quantity__c FROM Product__c WHERE Stock_Quantity__c < 10'
8
9);
10
11 }
12
13 global void execute(Database.BatchableContext BC, List<SObject> records) {
14
15 List<HandsMen_Product__c> productsToUpdate = new List<HandsMen_Product__c>();
16
17 // Cast SObject list to Product__c list
18
19 for (SObject record : records) {
20

Logs Tests Checkpoints Query Editor View State Progress Problems

Filter Click here to filter the log list

Job

Scheduled job: A time-based Apex job that runs the InventoryBatchJob at defined intervals, automating inventory updates and ensuring up-to-date stock information.

Setup

Home

Object Manager

Q jobs

Environments

Jobs

Apex Flex Queue

Apex Jobs

Background Jobs

Bulk Data Load Jobs

Scheduled Jobs

Didn't find what you're looking for? Try using Global Search.

SEARCH SETUP

Setup Scheduled Jobs

Help for this Page

All Scheduled Jobs

The All Scheduled Jobs page lists all of the jobs scheduled by your users. Multiple job types may display on this page. You can delete scheduled jobs if you have the permission to do so.

Percentage of Scheduled Jobs Used: 1%
You have currently used 1 scheduled Apex jobs out of an allowed organization limit of 100 active or scheduled jobs. To learn about how this limit is calculated and what contributes to it see the [Limits](#) topic.

View: All Scheduled Jobs Create New View

Schedule Apex

Action	Job Name ↑	Submitted By	Submitted	Started	Next Scheduled Run	Type	Cron Trigger ID
Manage Del Pause Job	Daily Inventory Sync	SAI PRANEETHA DUDAKUNTLA	7/18/2025, 1:17 AM		7/19/2025, 12:00 AM	Scheduled Apex	08egK000007evEs
Del	Metalytics Data Loader Job for Org : 00DgK000006TgV3	User Integration	6/30/2025, 10:18 AM	7/18/2025, 12:18 AM	7/19/2025, 12:18 AM	Autonomous Data Loader Job	08egK000006EPRM
	Program Milestone Computation Cron Job	Process, Automated	6/30/2025, 10:18 AM	7/18/2025, 6:59 AM	7/18/2025, 11:59 AM	Program Milestone Computation Cron Job	08egK000006EPRK
	Program Status Update Cron Job	Process, Automated	6/30/2025, 10:18 AM	7/18/2025, 5:01 AM	7/18/2025, 8:00 PM	Program Status Update Cron Job	08egK000006EPRL

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

GitHub Repository

<https://github.com/Praneetha719/HandsMen-Threads-Elevating-the-Art-of-Sophistication-in-Men-s-Fashion>

Future Enhancements

- Integrate NFC tags for real-time inventory tracking.
 - Add AI-driven wardrobe suggestions based on user profiles and weather.
 - Launch Meta Threads™: an augmented reality virtual closet.
 - Implement Einstein Analytics for customer trend predictions.
 - Provide VIP customer portal for booking stylist sessions.
 - Enable WhatsApp/Instagram-based messaging for promotions.
-

Conclusion

This Salesforce CRM for HandsMen Threads demonstrates a scalable, automated solution tailored for a high-end fashion brand. It successfully optimizes key operations through Apex, Flows, and declarative tools. The system can be extended with analytics, LWC components, and AI for next-gen CRM capabilities.
