

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

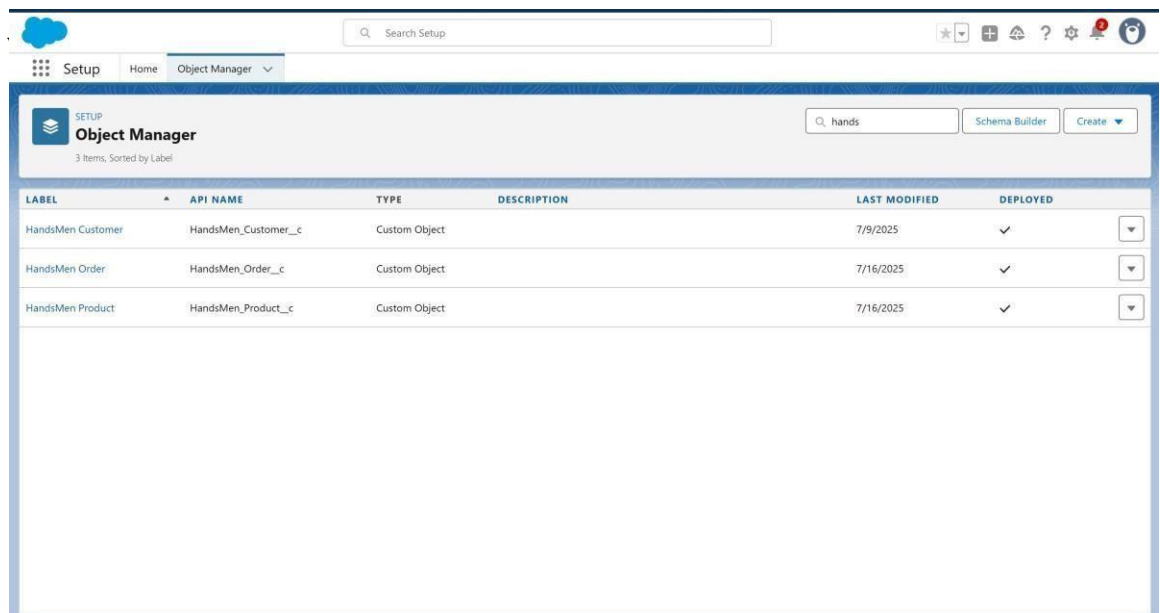
- Deployed metadata using Salesforce CLI and SFDX.
 - Initialized version control with Git.
 - Uploaded documentation and screenshots to GitHub
-

Detailed Implementation & Configuration

Data Management

Objects

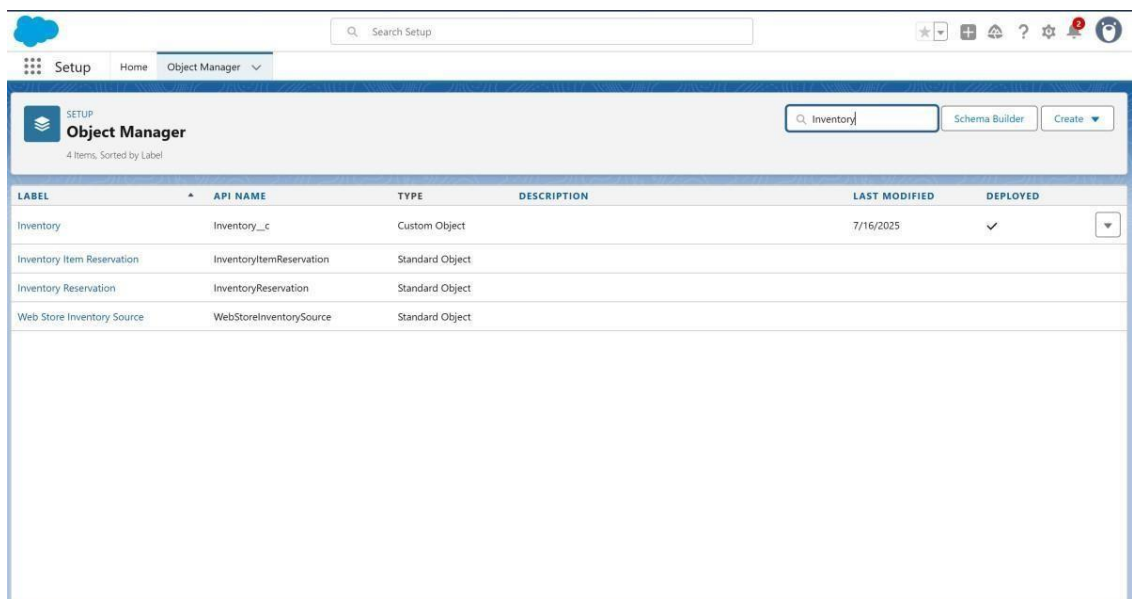
- **HandsMen_Customer_c** : Stores customer information including contact details, loyalty status, and order history, enabling personalized engagement and service tracking.
- **HandsMen_Product_c**: Captures product data like name, fabric type, price, and availability, supporting custom order creation 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'. The main header displays 'Object Manager' with a search bar containing 'hands' and buttons for 'Schema Builder' and 'Create'. Below the header is a table with the following data:

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	✓

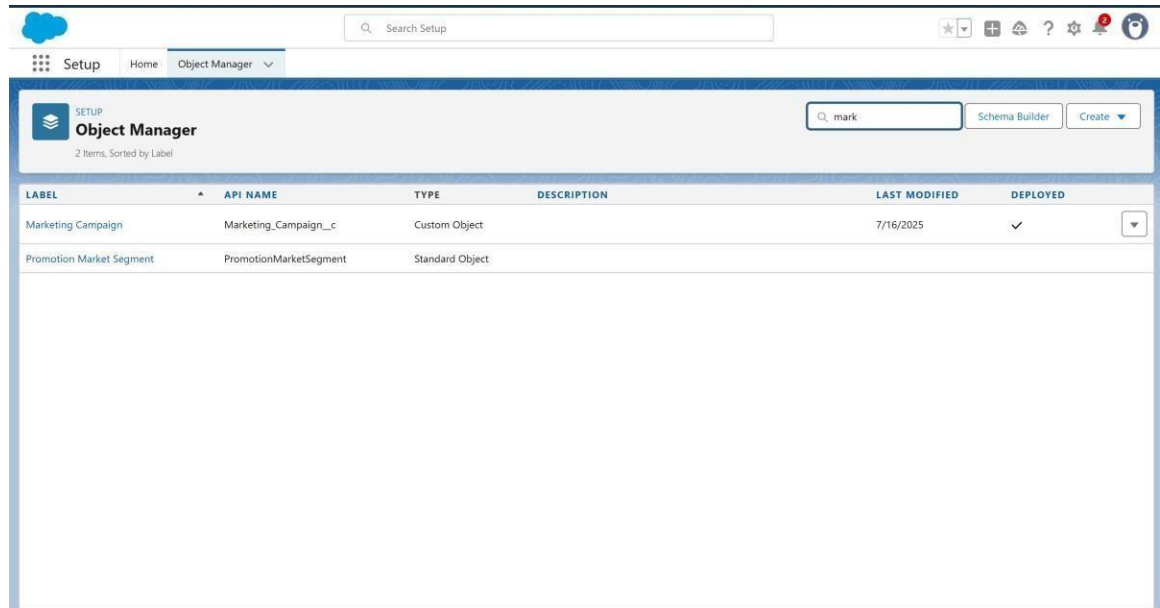
- **Inventory**: Manages stock levels of products across locations.



The screenshot shows the Salesforce Object Manager interface with the search bar set to 'Inventory'. The table displays the following data:

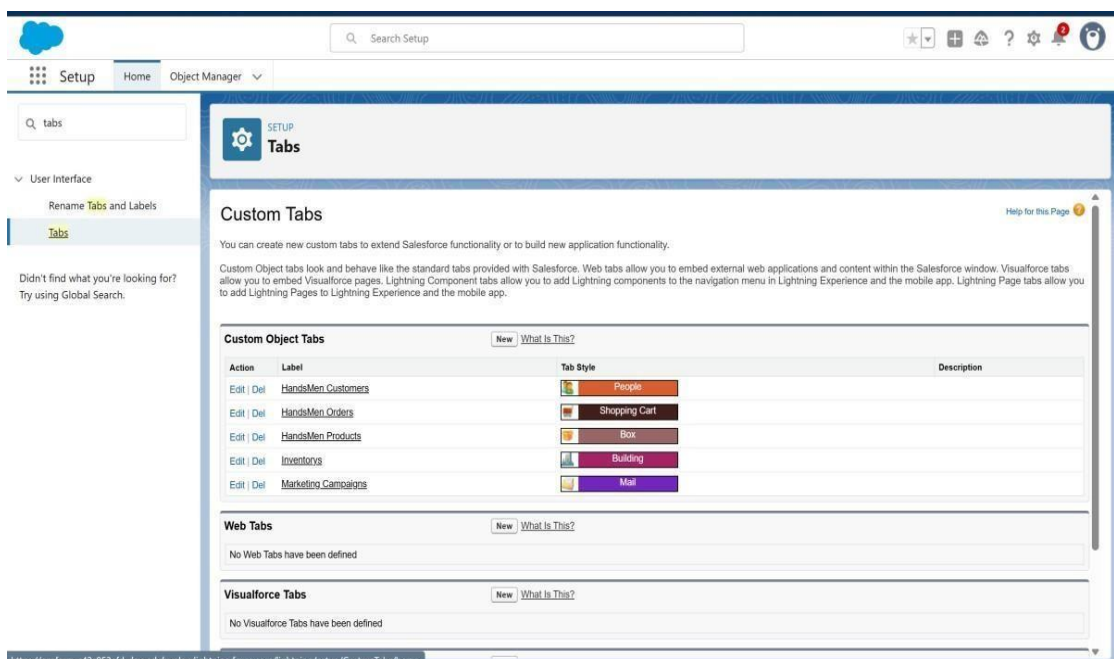
LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Inventory	Inventory__c	Custom Object		7/16/2025	✓
Inventory Item Reservation	InventoryItemReservation	Standard Object			
Inventory Reservation	InventoryReservation	Standard Object			
Web Store Inventory Source	WebStoreInventorySource	Standard Object			

- **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 Details & Branding' configuration page in the Salesforce Lightning App Builder. The page is divided into two main sections: 'App Details' and 'App Branding'.

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:** A placeholder image of a person in a suit.
- 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:** A preview of the app icon and name, showing 'HandsMen Threads' and a description: "Men Threads" likely refers to a project or brand focu...

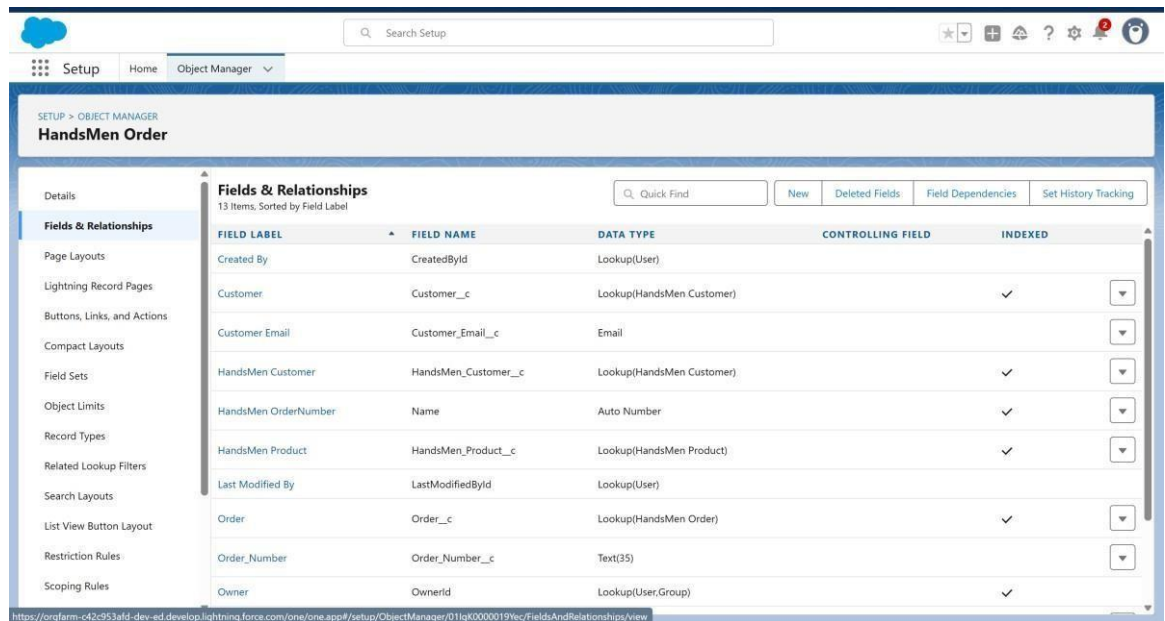
Fields

- **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 'Fields & Relationships' section for the 'HandsMen Customer' object in the Salesforce Setup interface. The table lists 14 items, sorted by Field Label.

Field Label	Field Name	Field Type	Field Format
Full Name	Full_Name_c	Formula (Text)	
Full Name	FullName_c	Formula (Text)	
HandsMen Customer Name	Name	Text(80)	✓
Last Modified By	LastModifiedById	Lookup(User)	
Last Name	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)	

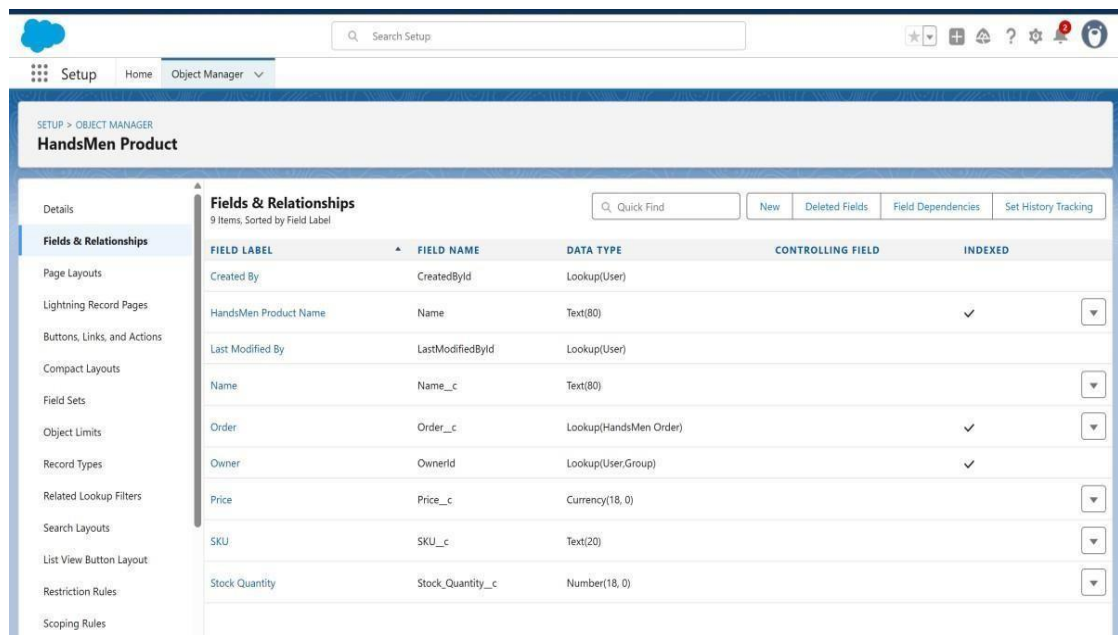
- **Fields -HandsMen Order:** Contains fields like Order_Date_c, Product_c (lookup), Quantity_c, Total_Amount_c, and Order_Status_c to manage and track customer purchase transactions.



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)		✓

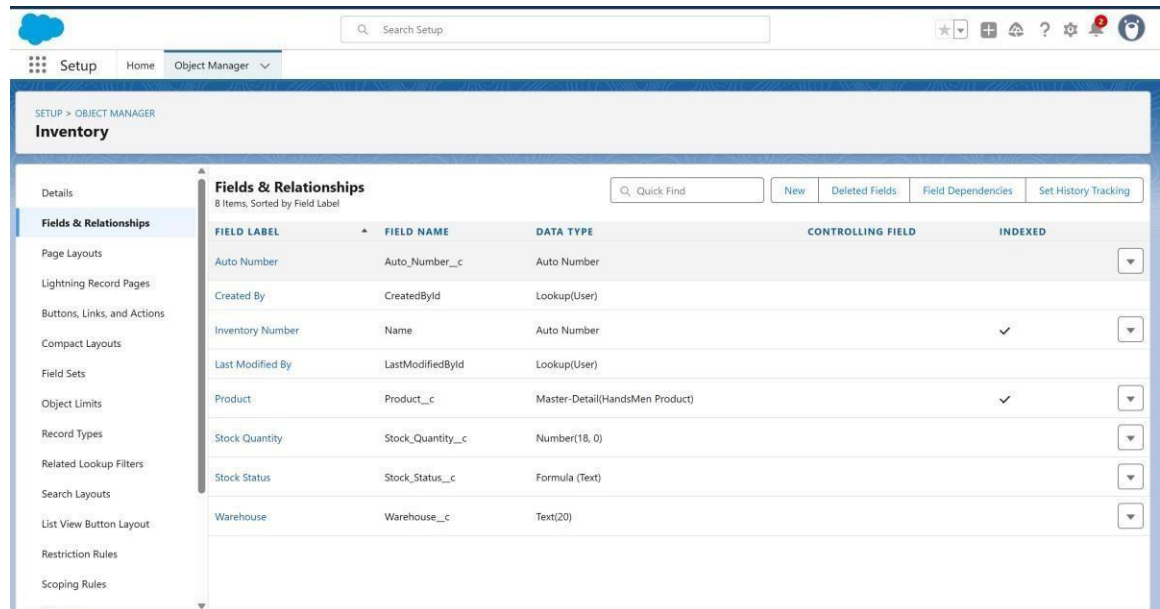
- **Fields -HandsMen Product:** Includes fields such as Product_Name_c, Fabric_Type_c, Price_c, Size_c, and Availability_Status_c to define product specifications and support inventory tracking.



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

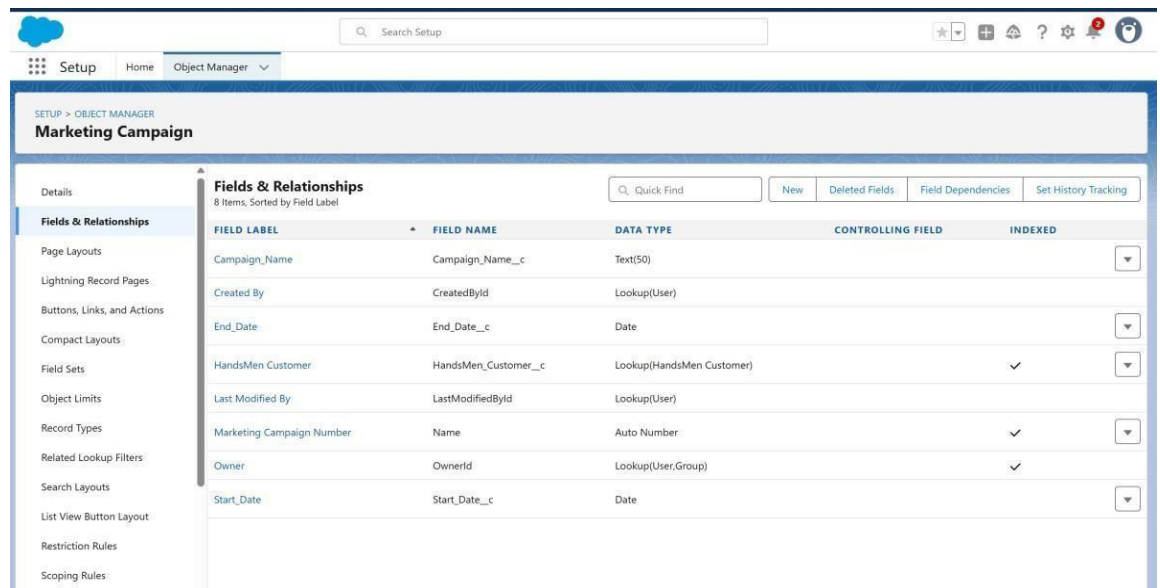
Details

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 the 'Validation Rule Detail' section, which contains the following 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	DUPAKUNTALA SAI PRANEETHA, 7/14/2025, 11:55 PM	Modified By: DUPAKUNTALA 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.

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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 the 'Validation Rule Detail' section, which contains the following 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	DUPAKUNTALA SAI PRANEETHA, 7/15/2025, 12:08 AM	Modified By: DUPAKUNTALA 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 'Inventory Validation Rule' configuration page in Salesforce Setup. 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 contains the following information:

Validation Rule Detail		Active	✓
Rule Name	Stock_Quantity		
Error Condition Formula	Stock_Quantity_c <= 0		
Error Message	the inventory count is never less than zero.	Error Location	Top of Page
Description			
Created By	DUPAKUNTALA SAI PRANEETHA, 7/15/2025, 12:03 AM	Modified By	DUPAKUNTALA SAI PRANEETHA, 7/15/2025, 6:44 AM

Data Security

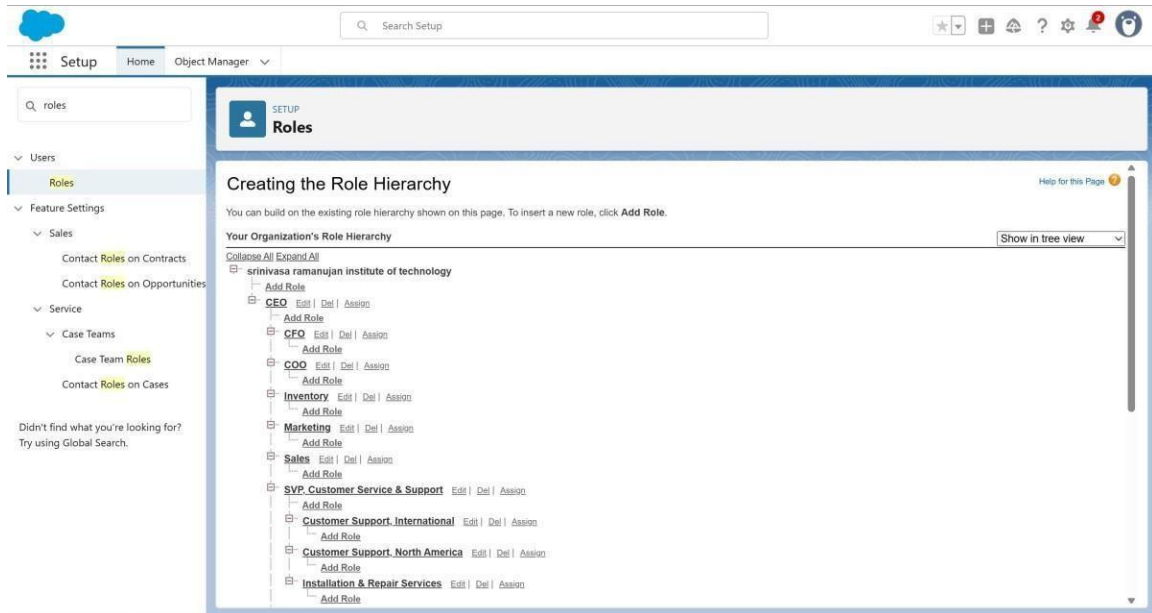
Profiles

- **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 'Profiles' configuration page in Salesforce Setup. The left sidebar contains a navigation menu with options like Users, Profiles, and a search bar. The main content area is titled 'Profiles' and includes a search bar. Below this is the 'Custom Object Permissions' section, which contains a table with columns for 'Basic Access' (Read, Create, Edit, Delete) and 'Data Administration' (View All Records, Modify All Records, View All Fields). The table lists permissions for 'HandsMen Customers', 'HandsMen Orders', and 'HandsMen Products'. Below this is the 'Session Settings' section, which includes a dropdown for 'Session Times Out After' (set to 2 hours of inactivity) and a dropdown for 'Session Security Level Required at Login' (set to --None--). Below this is the 'Password Policies' section, which includes a dropdown for 'User passwords expire in' (set to 90 days), a dropdown for 'Enforce password history' (set to 3 passwords remembered), a dropdown for 'Minimum password length' (set to 8), a dropdown for 'Password complexity requirement' (set to Must include alpha and numeric characters), a dropdown for 'Password question requirement' (set to Cannot contain password), and a dropdown for 'Maximum invalid login attempts' (set to 5).

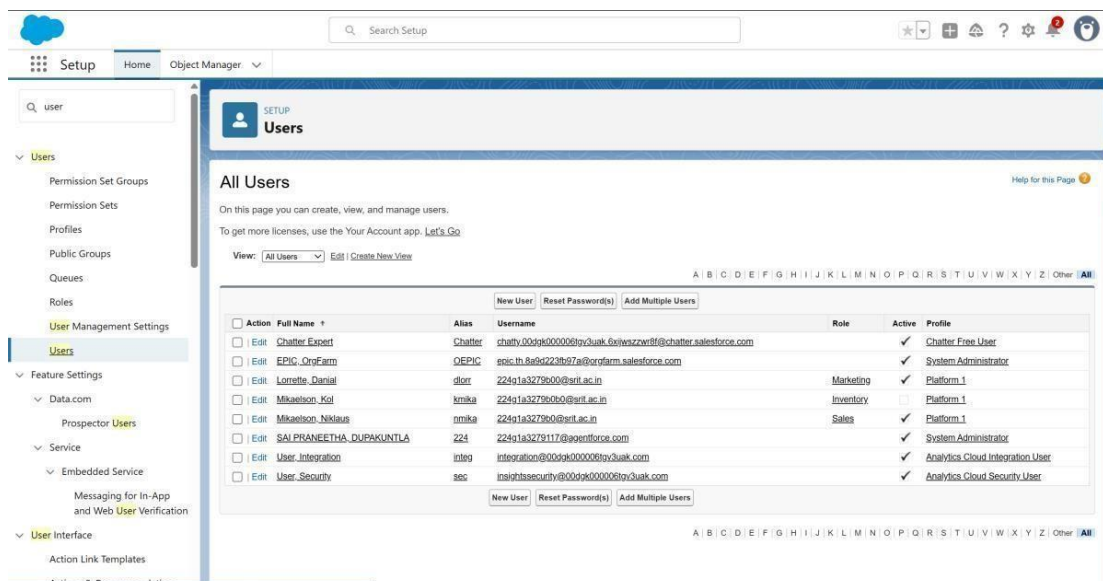
Roles

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.



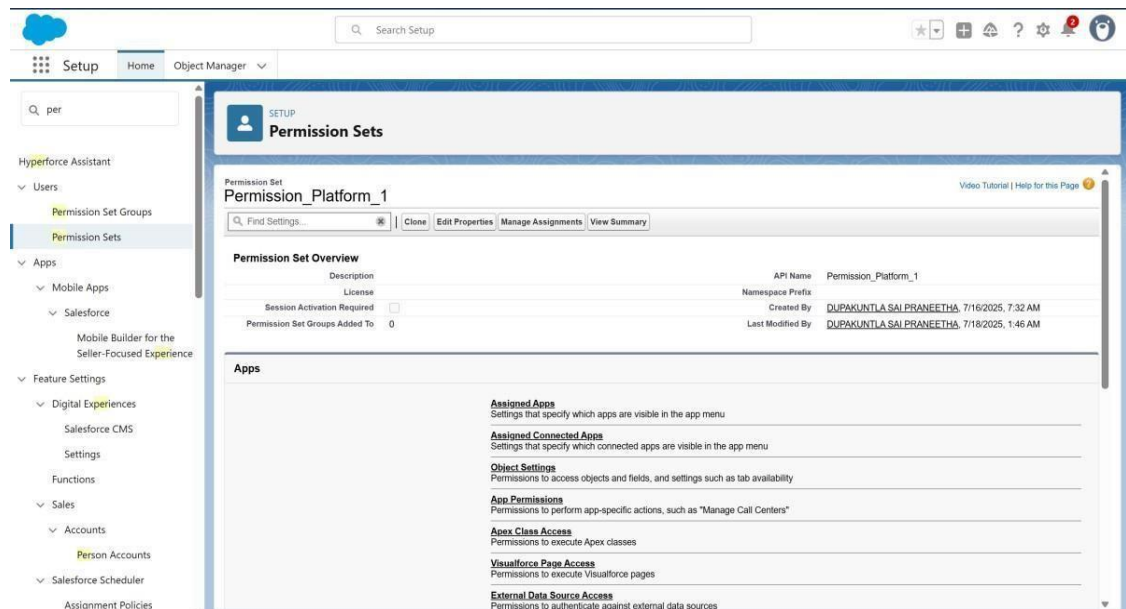
Users

- **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.

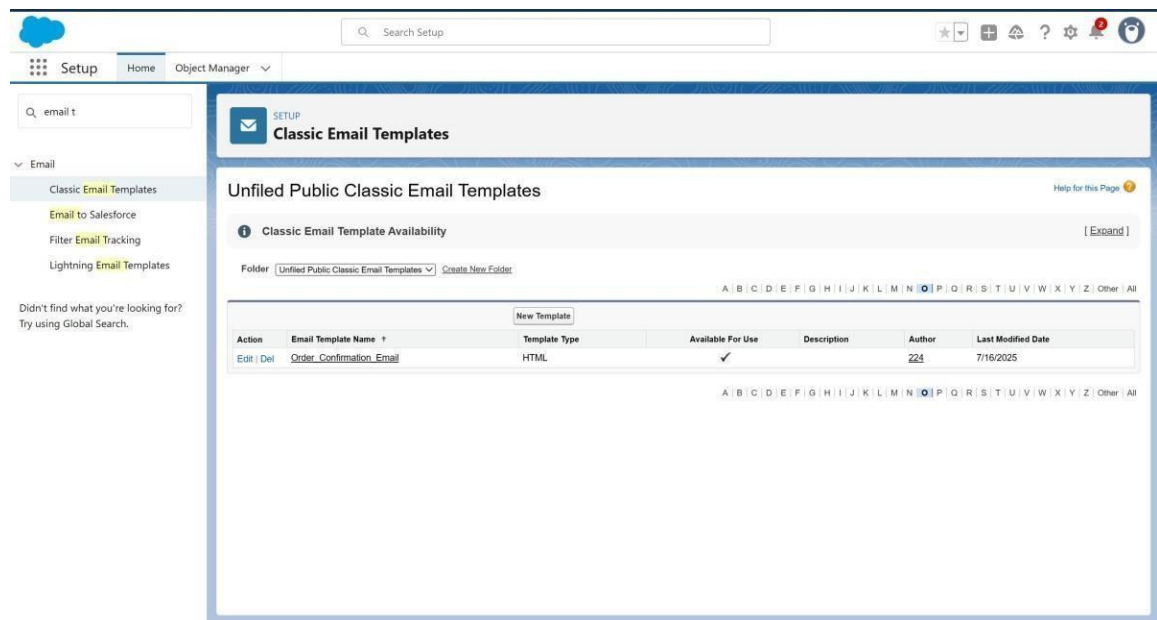


Permission Sets

- **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.

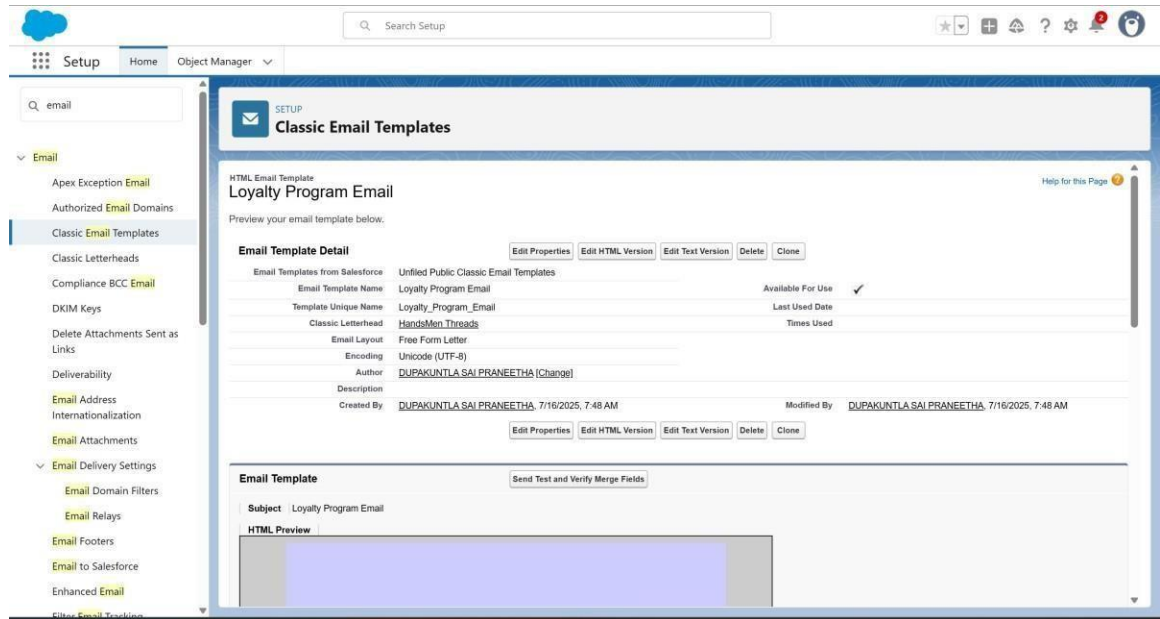


Email Templates & Alerts

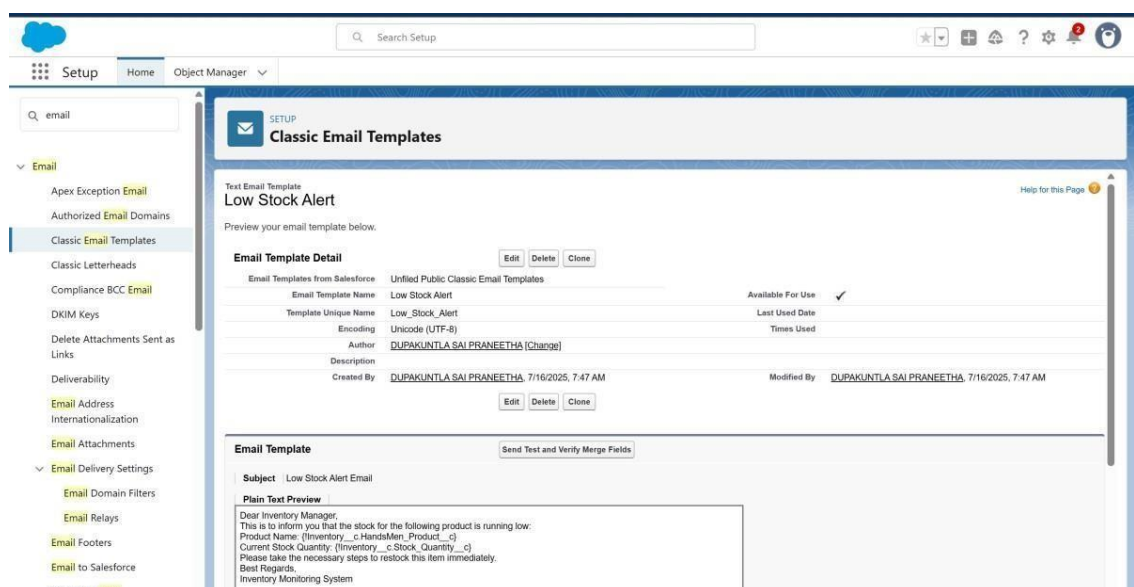


- **Order Confirmation Email Template:** A pre-designed email template automatically sent to customers after order placement, summarizing order details and confirming successful submission

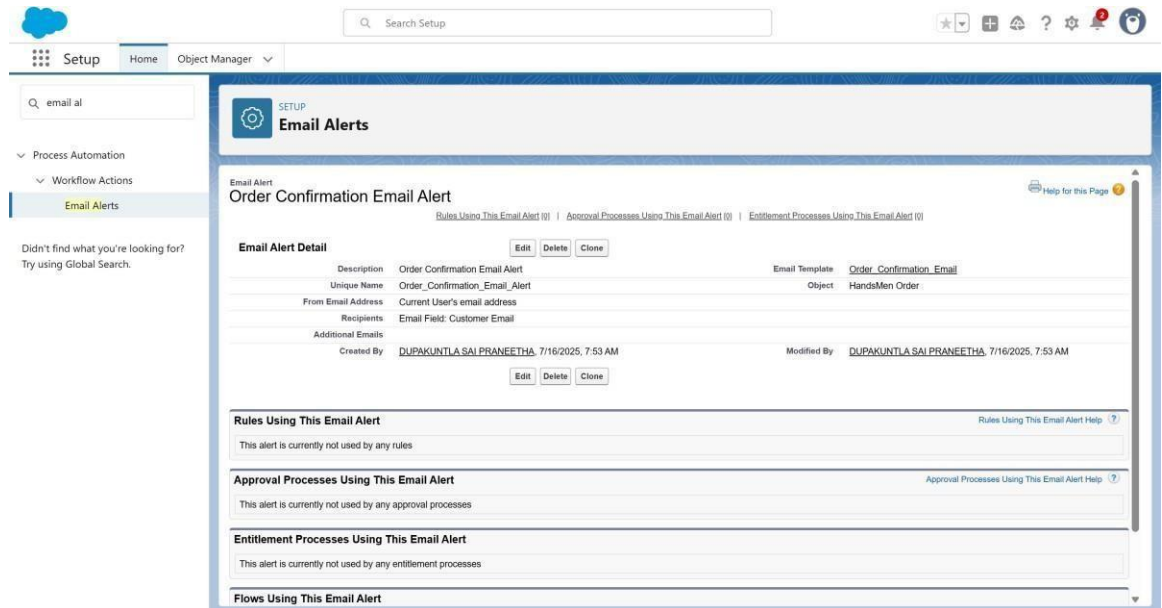
- **Loyalty Email Template:** An automated email template used to notify customers about their updated loyalty status, rewards, or exclusive offers based on their purchase history.



- **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

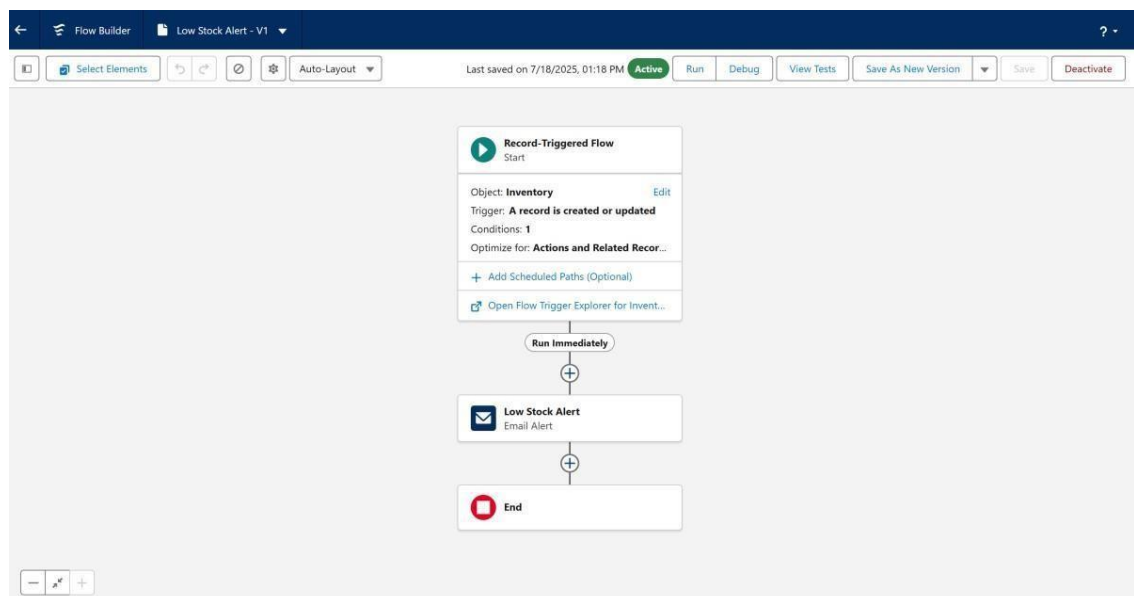


- **Email Alert for Order Confirmation Email:** A configured alert that triggers the Order Confirmation Email Template upon successful order creation, ensuring timely communication with customers.

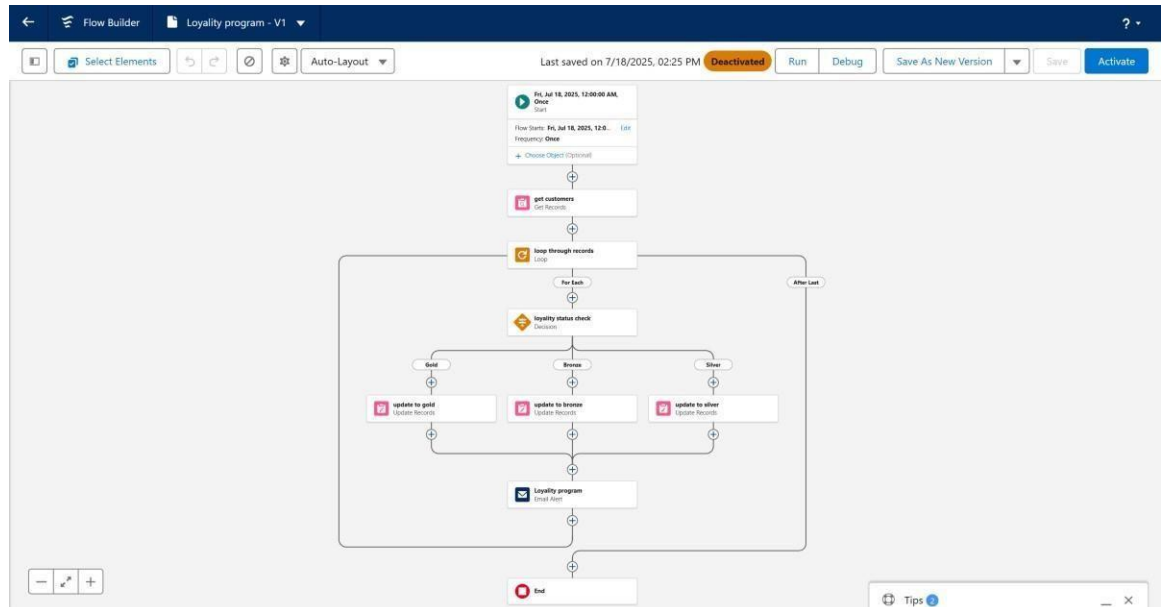


Flows

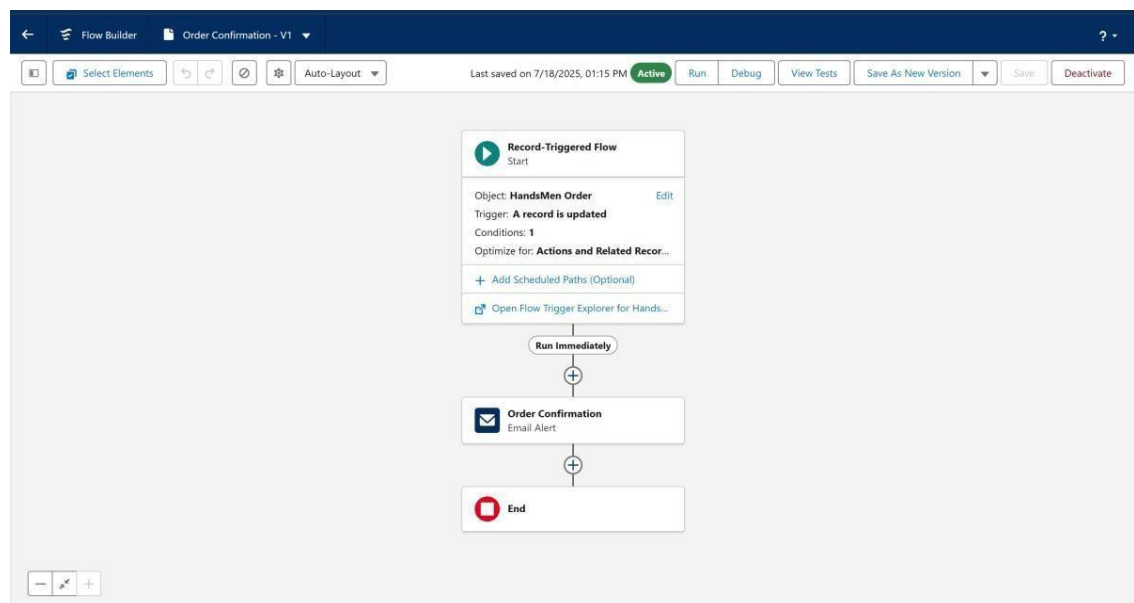
- **Stock Alert Flow:** Triggers alerts when inventory levels fall below a threshold.



- **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.

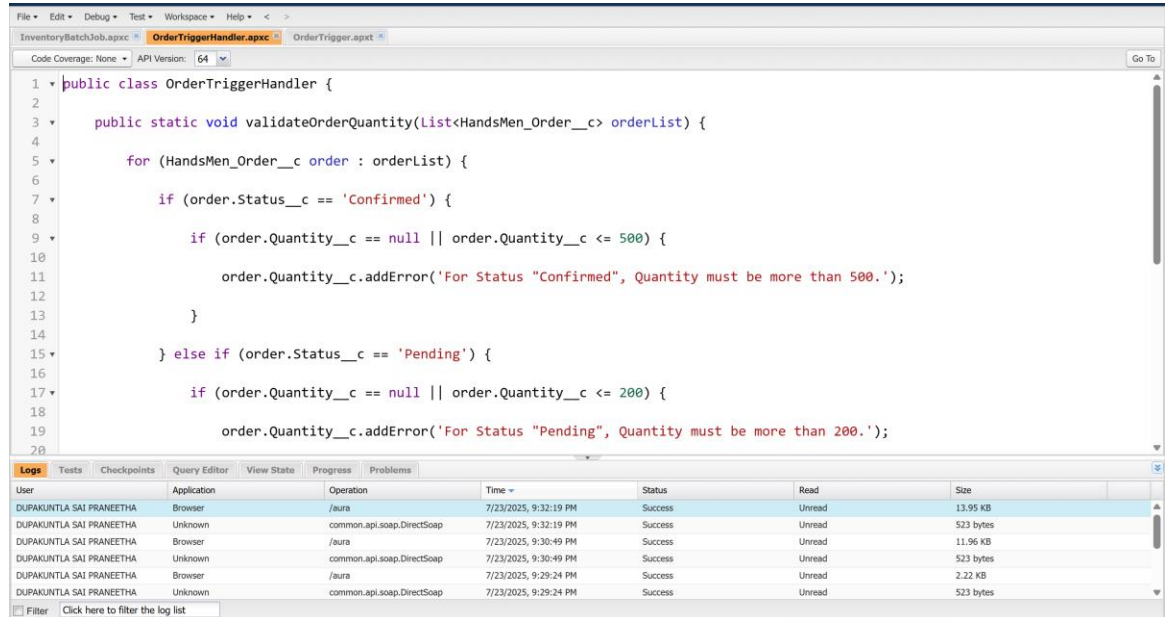


- **Create Order Confirmation Email:** A Flow that generates and sends a confirmation email to customers immediately after an order is placed, ensuring real-time communication and transparency.



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.

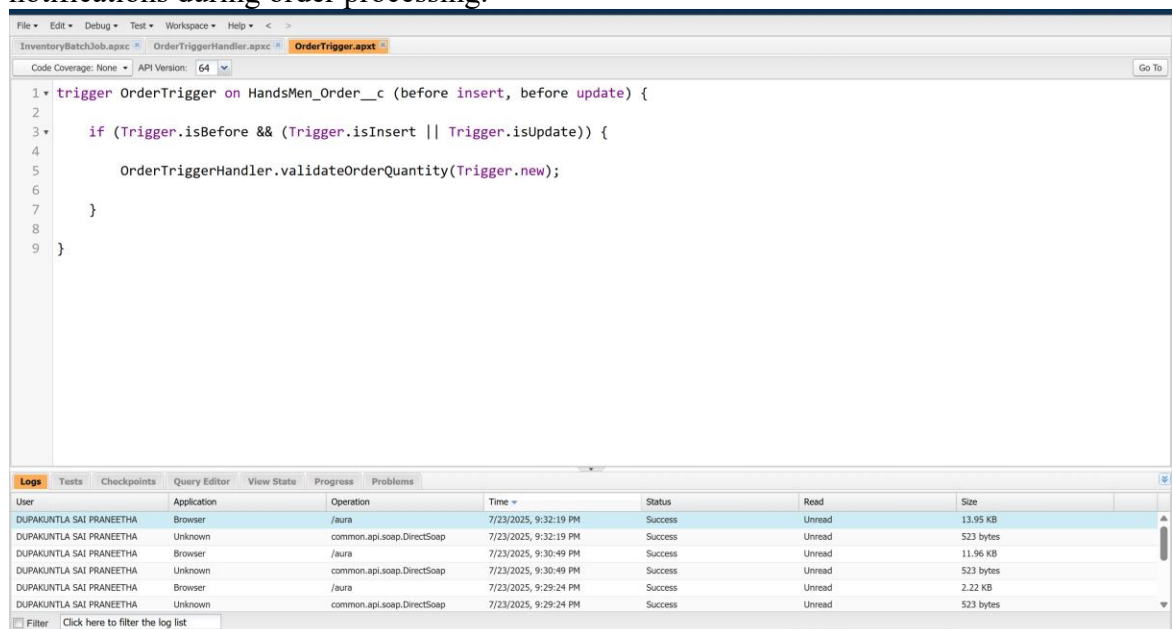


```
1 public class OrderTriggerHandler {
2
3     public static void validateOrderQuantity(List<HandsMen_Order__c> orderList) {
4
5         for (HandsMen_Order__c order : orderList) {
6
7             if (order.Status__c == 'Confirmed') {
8
9                 if (order.Quantity__c == null || order.Quantity__c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

| User                      | Application | Operation                  | Time                  | Status  | Read   | Size      |
|---------------------------|-------------|----------------------------|-----------------------|---------|--------|-----------|
| DUPAKUNTILA SAI PRANEETHA | Browser     | /aura                      | 7/23/2025, 9:32:19 PM | Success | Unread | 13.95 KB  |
| DUPAKUNTILA SAI PRANEETHA | Unknown     | common.api.soap.DirectSoap | 7/23/2025, 9:32:19 PM | Success | Unread | 523 bytes |
| DUPAKUNTILA SAI PRANEETHA | Browser     | /aura                      | 7/23/2025, 9:30:49 PM | Success | Unread | 11.96 KB  |
| DUPAKUNTILA SAI PRANEETHA | Unknown     | common.api.soap.DirectSoap | 7/23/2025, 9:30:49 PM | Success | Unread | 523 bytes |
| DUPAKUNTILA SAI PRANEETHA | Browser     | /aura                      | 7/23/2025, 9:29:24 PM | Success | Unread | 2.22 KB   |
| DUPAKUNTILA SAI PRANEETHA | Unknown     | common.api.soap.DirectSoap | 7/23/2025, 9:29:24 PM | Success | Unread | 523 bytes |


```

- **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.



```
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 }
```

User	Application	Operation	Time	Status	Read	Size
DUPAKUNTILA SAI PRANEETHA	Browser	/aura	7/23/2025, 9:32:19 PM	Success	Unread	13.95 KB
DUPAKUNTILA SAI PRANEETHA	Unknown	common.api.soap.DirectSoap	7/23/2025, 9:32:19 PM	Success	Unread	523 bytes
DUPAKUNTILA SAI PRANEETHA	Browser	/aura	7/23/2025, 9:30:49 PM	Success	Unread	11.96 KB
DUPAKUNTILA SAI PRANEETHA	Unknown	common.api.soap.DirectSoap	7/23/2025, 9:30:49 PM	Success	Unread	523 bytes
DUPAKUNTILA SAI PRANEETHA	Browser	/aura	7/23/2025, 9:29:24 PM	Success	Unread	2.22 KB
DUPAKUNTILA SAI PRANEETHA	Unknown	common.api.soap.DirectSoap	7/23/2025, 9:29:24 PM	Success	Unread	523 bytes

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 • OrderTriggerHandler.apxc • OrderTrigger.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

User	Application	Operation	Time	Status	Read	Size
DUPAKUNTLA SAI PRANEETHA	Browser	/aura	7/23/2025, 9:32:19 PM	Success	Unread	13.95 KB
DUPAKUNTLA SAI PRANEETHA	Unknown	common.api.soap.DirectSoap	7/23/2025, 9:32:19 PM	Success	Unread	523 bytes
DUPAKUNTLA SAI PRANEETHA	Browser	/aura	7/23/2025, 9:30:49 PM	Success	Unread	11.96 KB
DUPAKUNTLA SAI PRANEETHA	Unknown	common.api.soap.DirectSoap	7/23/2025, 9:30:49 PM	Success	Unread	523 bytes
DUPAKUNTLA SAI PRANEETHA	Browser	/aura	7/23/2025, 9:29:24 PM	Success	Unread	2.22 KB
DUPAKUNTLA SAI PRANEETHA	Unknown	common.api.soap.DirectSoap	7/23/2025, 9:29:24 PM	Success	Unread	523 bytes

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.

Cloud

Search Setup

Setup Home Object Manager

jobs

EnvironmentsJobsApex Flex QueueApex JobsBackground JobsBulk Data Load JobsScheduled Jobs

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

SETUP

Scheduled Jobs

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, DUPAKUNTLA	7/18/2025, 1:17 AM	7/18/2025, 12:18 AM	7/19/2025, 12:00 AM	Scheduled Apex	08egK000007evEs
Del	Metalytica 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.
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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.
