PROJECT DOCUMENTATION

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

PROJECT OVERVIEW

HandsMen Threads is a men's fashion brand that focuses on premium products and tailoring services. As the business grows, the company needs a centralized system that can manage customer data, orders, products, inventory, and marketing activities in an integrated and consistent manner.

This project aims to build and implement Salesforce CRM as the primary solution for data management and business process automation. This CRM system is designed to improve customer service quality, maintain data integrity, and support real-time data-driven decision making. Key features developed include customer management, order management, stock monitoring, loyalty programs, and automated email notifications.

OBJECTIVES

The main objective of developing Salesforce CRM at HandsMen Threads is to create an efficient, integrated, and scalable system to support business operational needs. Specifically, this project aims to improve customer relationship management, automate core business processes, and minimize manual errors in data management.

The implementation of this CRM is also expected to provide business value in the form of increased customer satisfaction through more personalized communication, optimized inventory management to prevent stockouts, and increased efficiency for the sales, inventory, and marketing teams.

PHASE 1: REQUIREMENT ANALYSIS & PLANNING

Understanding Business Requirements

HandsMen Threads requires a system that is capable of:

- Storing customer data centrally and consistently
- Managing orders and calculating transaction totals automatically
- Monitoring stock availability in real time
- Sending automatic notifications regarding orders, stock, and customer loyalty
- Managing user access rights based on job roles

Defining Project Scope and Objectives

The scope of the project includes the development of Salesforce CRM, ranging from data model design, security configuration, business process automation, to testing and deployment. The project does not include external system integration in the initial stage.

Data Model & Security Model Design

The data model is designed using several main custom objects:

- HandsMen Customer

- HandsMen Product
- HandsMen Order
- Inventory
- Marketing Campaign

Figure 1. Custom Objects HandsMen Threads in the Salesforce Object Manager.

The security model is designed using Profiles, Roles, Permission Sets, and Sharing Rules to ensure data access is in line with user responsibilities.

Stakeholders Mapping
The main stakeholders in this project include:
- Sales Team
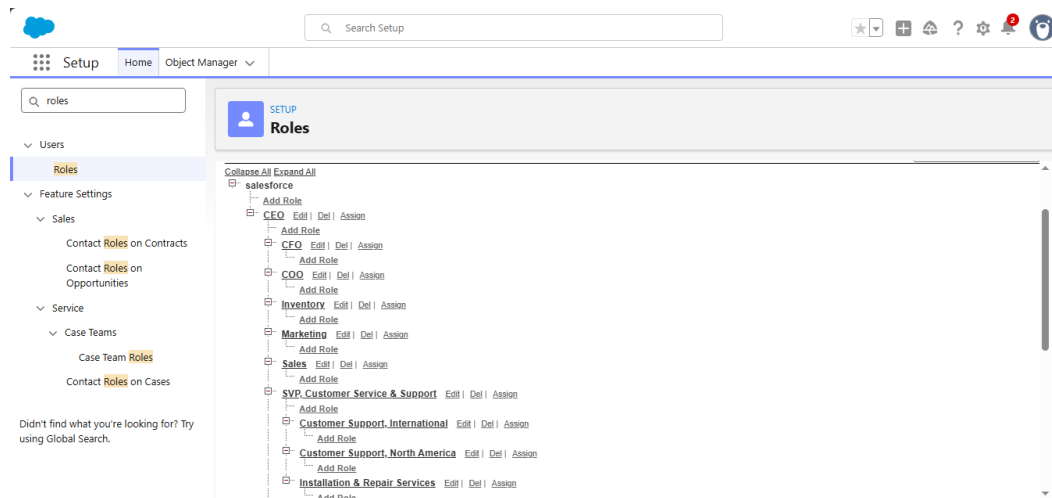- Inventory Team
- Marketing Team

Figure 2. Role hierarchy in the Salesforce CRM HandsMen Threads.

Execution Roadmap
The project is implemented in stages: needs analysis, development, testing, deployment, and maintenance.

PHASE 2: SALESFORCE DEVELOPMENT – BACKEND & CONFIGURATIONS
Environment Setup & DevOps Workflow
Development is carried out using Salesforce Developer Org as a testing and development environment prior to deployment to production.

Custom Objects, Fields & Validation Rules
Several custom objects were created to support business needs, including Customer, Product, Order, Inventory, and Marketing Campaign. Validation rules were implemented to maintain data quality, such as:
• The total order amount cannot be zero or negative.
• Inventory stock cannot be less than zero.
• Customer email addresses must use a valid format.

Figure 3. Field configuration on HandsMen Order and Handsmen Customer

Figure 4. Validation rule for the total amount on the handsmen order.
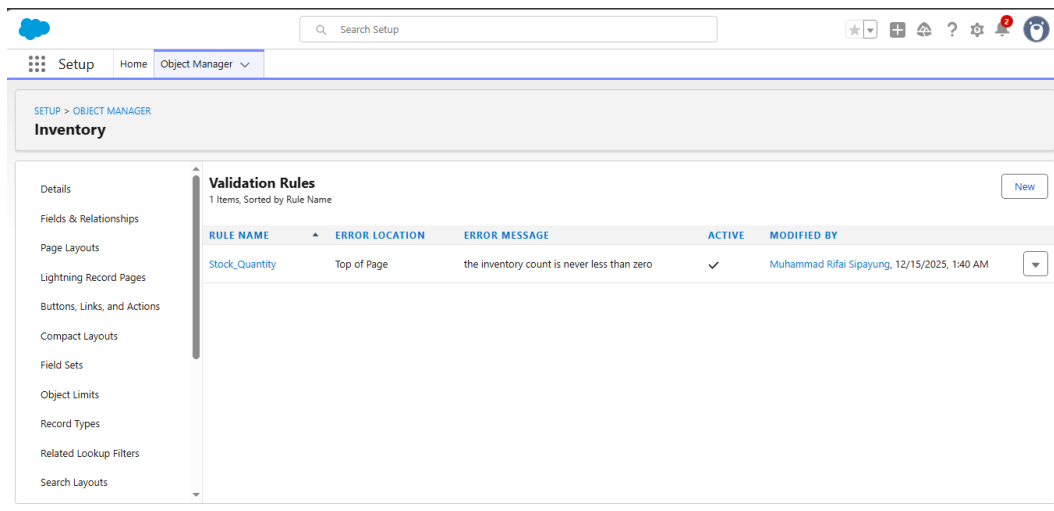
Figure 5. Validation rule for the stock quantity on the inventory.
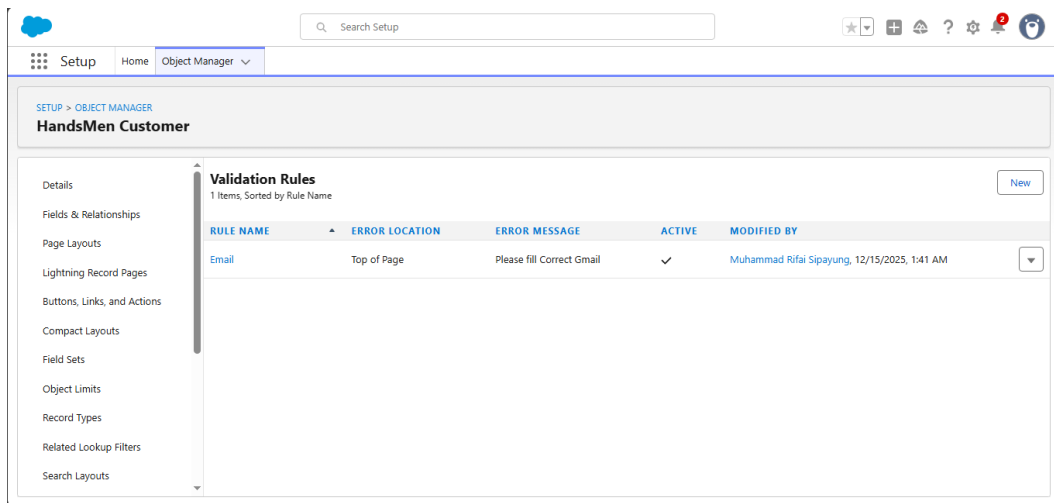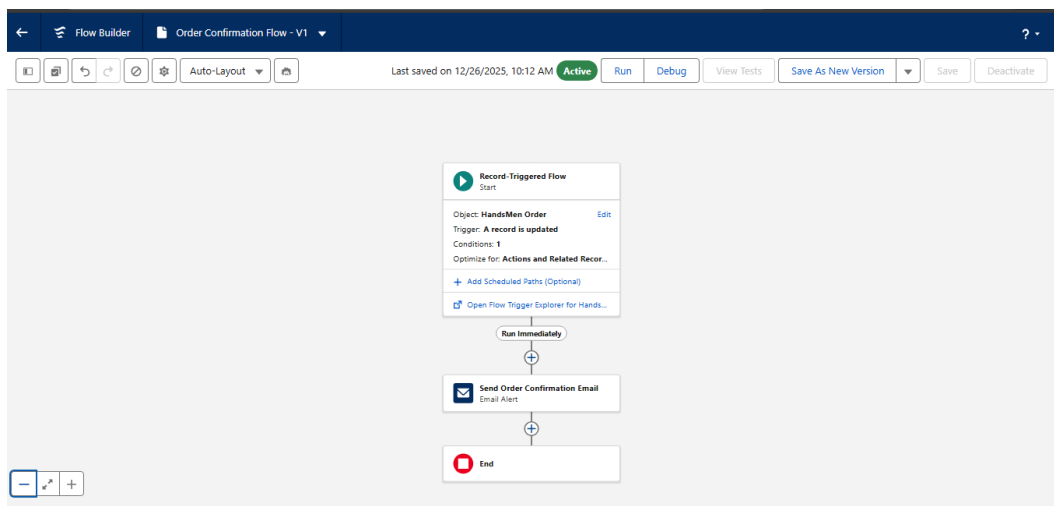

Figure 6. Validation rule for the email on the handsmen customer.

Automation

Business process automation is implemented using:

- Record-Triggered Flow for order confirmation and low stock alerts
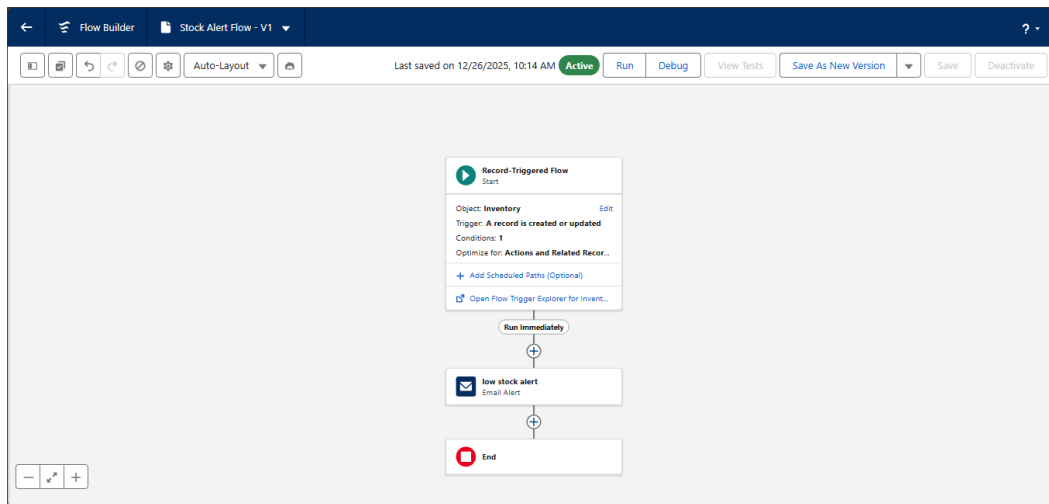- Scheduled Flow for customer loyalty status updates

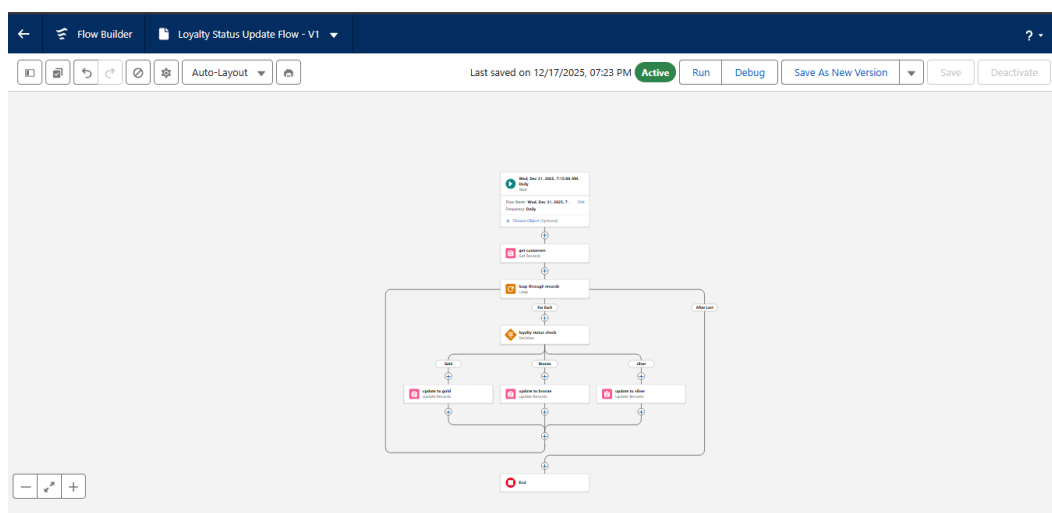**Figure 7. Record-triggered flow order confirmation and stock alert**

Figure 8. Scheduled flow for loyalty status updates.

Apex Classes & Triggers

Apex is used for complex business logic, including:

- Calculation of total order price
- Automatic stock reduction
- Customer loyalty status updates
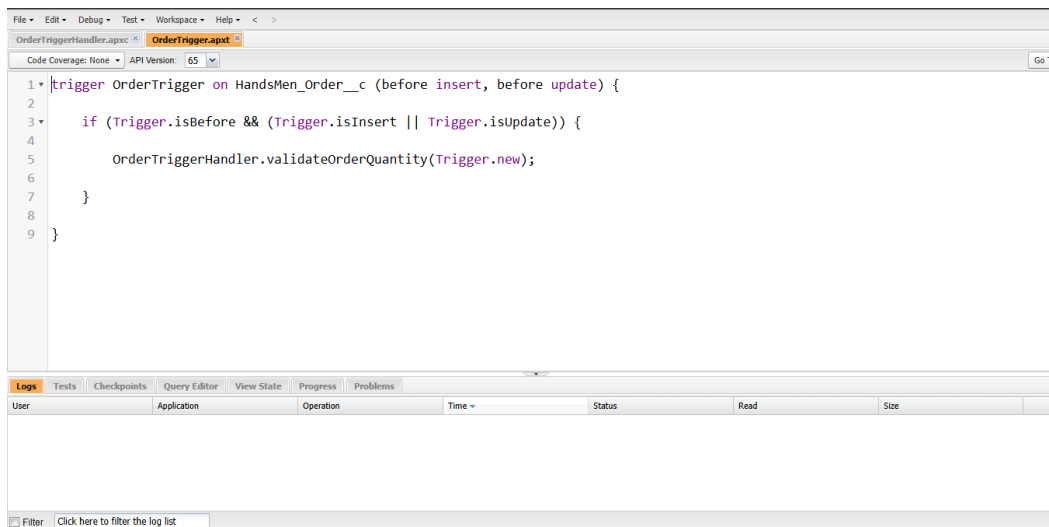- Apex batch for stock synchronization and scheduled data updates.

Figure 9. Apex class OrderTriggerHandler and Apex trigger OrderTrigger
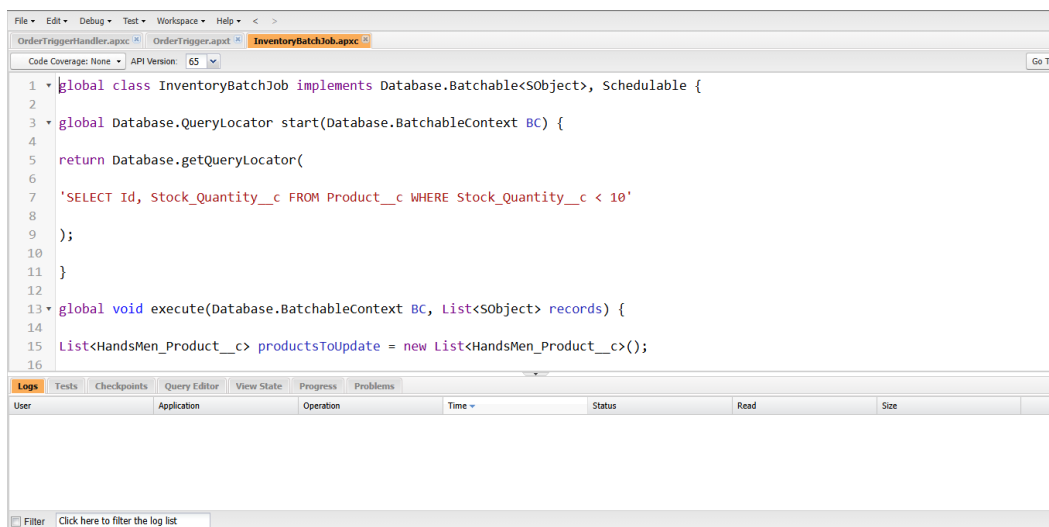

Figure 10. Batch Apex Inventory Sync

PHASE 3: UI/UX DEVELOPMENT & CUSTOMIZATION
Lightning App Setup

The Lightning application named HandsMen Threads was created through App Manager as a central point of access for users to all CRM features.
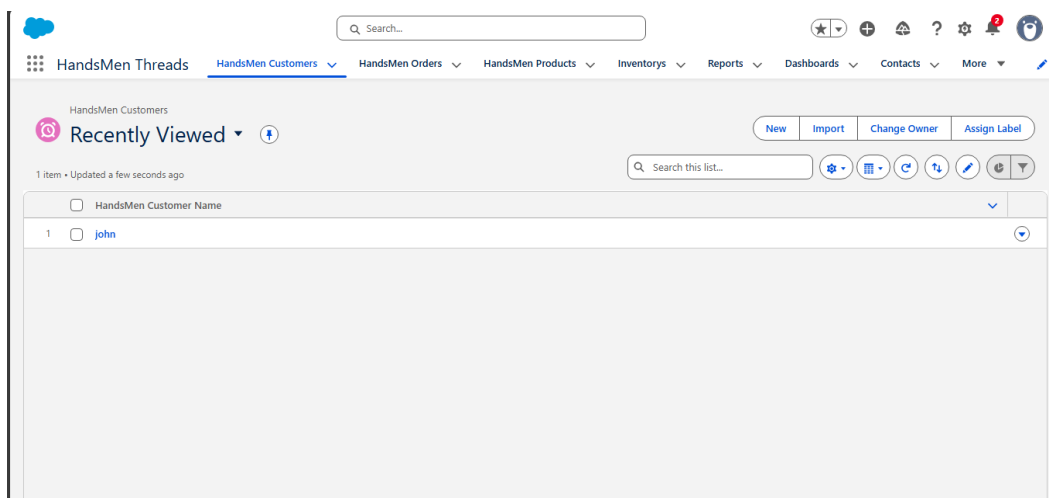
Figure 11. Lightning App Hands-On Threads in the App Manager.

Page Layouts & Dynamic Forms

Page layouts are customized based on the needs of each object so that users can easily access important fields.
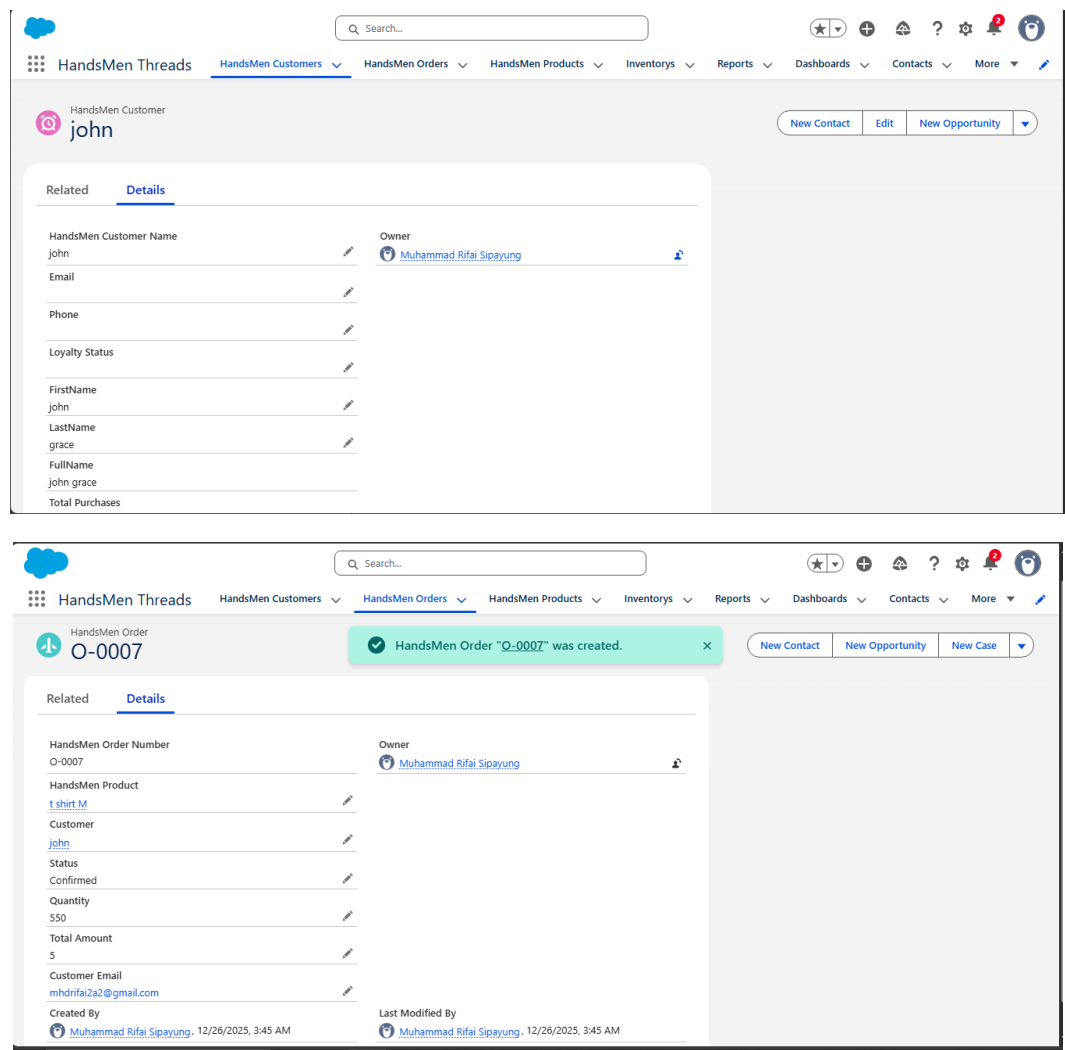

Figure 12. Page layout of the HandsMen customer and Handsmen orders,etc.

User Management

Users are created and classified based on roles such as Sales, Inventory, and Marketing to ensure proper access control.
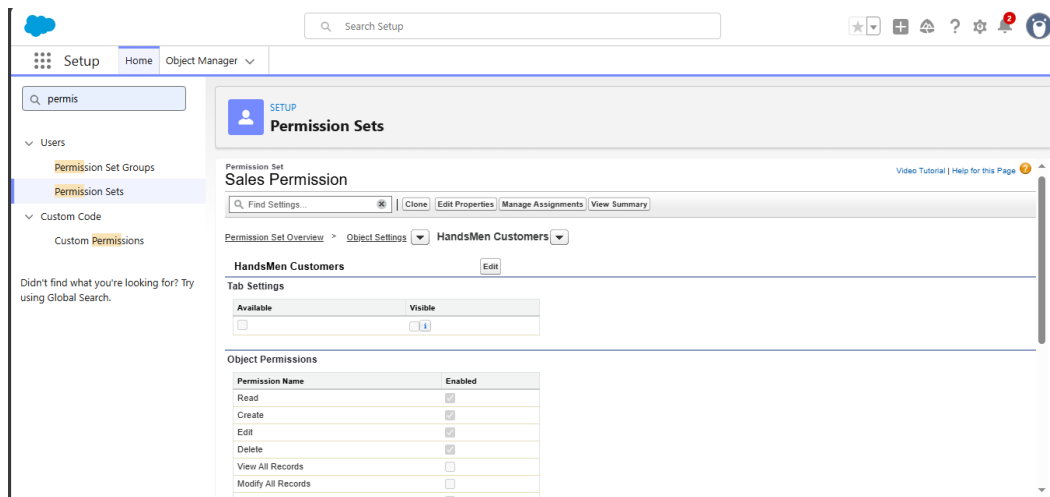
Figure 13. User configuration and permission set.

Reports & Dashboards

Reports and dashboards are developed to monitor sales, inventory, and customer activity in real-time.
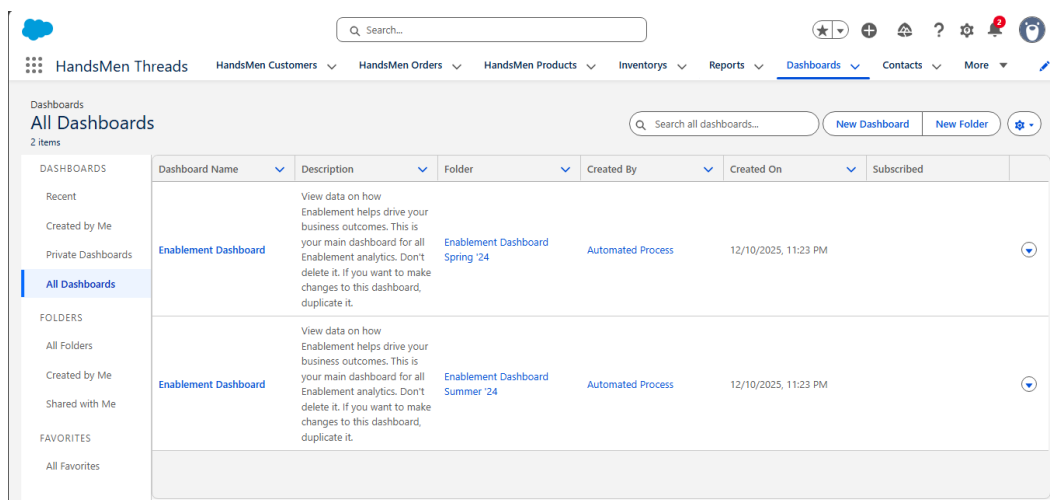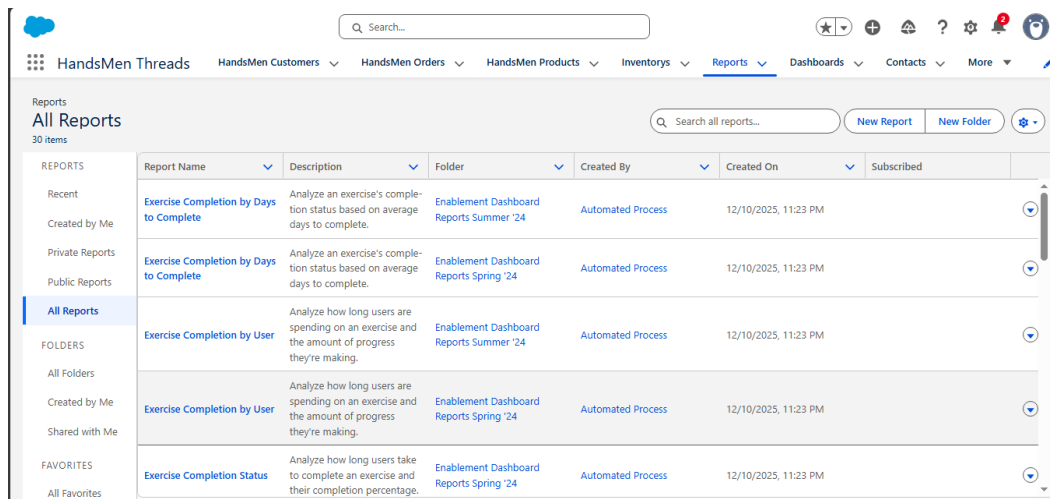
Figure 14. HandsMen Threads sales Reports and dashboard

PHASE 4: DATA MIGRATION, TESTING & SECURITY
Data Migration
The data loading process is performed using the Data Import Wizard and Data Loader according to data volume requirements.

Data Quality & Security
- Field History Tracking is used to monitor important data changes.
- Duplicate Rules and Matching Rules are applied to prevent data duplication.
- Profiles, Roles, Permission Sets, and Sharing Rules are configured for system security.

Testing Approach
- Testing is performed through:
- Unit testing on Apex Classes and Triggers
- End-to-end testing on flows, email alerts, and validation
- Business scenario testing such as order creation, stock updates, and loyalty changes

New Inventory

* = Required Information

Information

Inventory Number

* Product

t shirt M ✕

Stock_Quantity

4

Warehouse

5

Cancel Save & New Save

HandsMen Customers ▾ HandsMen Orders ▾ HandsMen Products ▾ Inventorys ▾ Reports ▾ Dashboards ▾ Contacts ▾ More ▾

Inventory
I -0008

New Contact Edit New Opportunity ▾

Related **Details**

Inventory Number
I -0008

Product
t shirt M

Stock_Quantity
4

Stock Status
Low Stock

Warehouse
5

Created By
Muhammad Rifai Sipayung, 12/26/2025, 3:42 AM

Last Modified By
Muhammad Rifai Sipayung, 12/26/2025, 3:42 AM

HandsMen Order Number

Owner
Muhammad Rifai Sipayung

Customer

john ✕

Status

Confirmed

Quantity

550

Total Amount

5

Customer Email

mhdrifai2a2@gmail.com

HandsMen Product

t shirt M ✕

Change Owner Assign Label

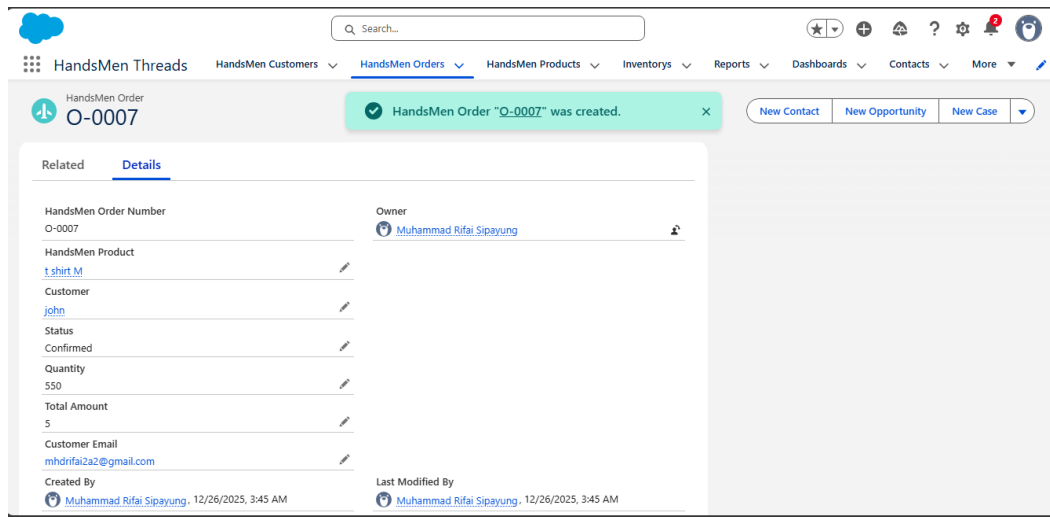Cancel Save & New Save

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Figure 15. Input and Output Customers, Orders and Inventorys

PHASE 5: DEPLOYMENT, DOCUMENTATION & MAINTENANCE
Deployment Strategy
Deployment is performed using Change Sets to ensure that configurations and code can be safely transferred to the production environment.

Maintenance & Monitoring
The system is monitored regularly to ensure optimal performance, including checking error logs, scheduled jobs, and email alerts.

Troubleshooting Approach
The troubleshooting approach is carried out by analyzing debug logs, error messages, and making configuration or code adjustments if necessary.

CONCLUSION
The implementation of Salesforce CRM at HandsMen Threads has successfully provided an integrated system to support customer, order, inventory, and marketing management. By utilizing Salesforce features such as custom objects, automation, validation rules, and Apex, this system is able to improve operational efficiency, maintain data quality, and provide a better customer experience.

FUTURE ENHANCEMENTS
- Some developments that can be made in the future include:
- Customer portal integration
- Mobile application development
- Advanced analytics dashboard
- AI integration for product recommendations
- WhatsApp or SMS integration for customer notifications