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

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BSIT 4-1

Project Overview:

The HandsMen Threads, a dynamic leader in the fashion industry was launching a Salesforce CRM (Customer Relationship Management) project that aim to transform its data management capabilities and enhancing customer engagement. The focus of this project is to build a comprehensive and scalable data model that captures all of the business information while ensuring data quality and integrity through an intuitive and controlled UI interactions.

Objectives:

- To create a robust salesforce data model to integrate all relevant customers, orders, and inventory information in a single accessible platform.
- To implement a UI-based controls and validation rules to maintain reliable and consistent data.
- To automate customer engagement processes by streamlining communication through automated ordering confirmations and loyalty program updates that will foster a stronger customer relationship.
- To optimized inventory management and enhance operational efficiency through proactive stock alerts and new workflow integration.

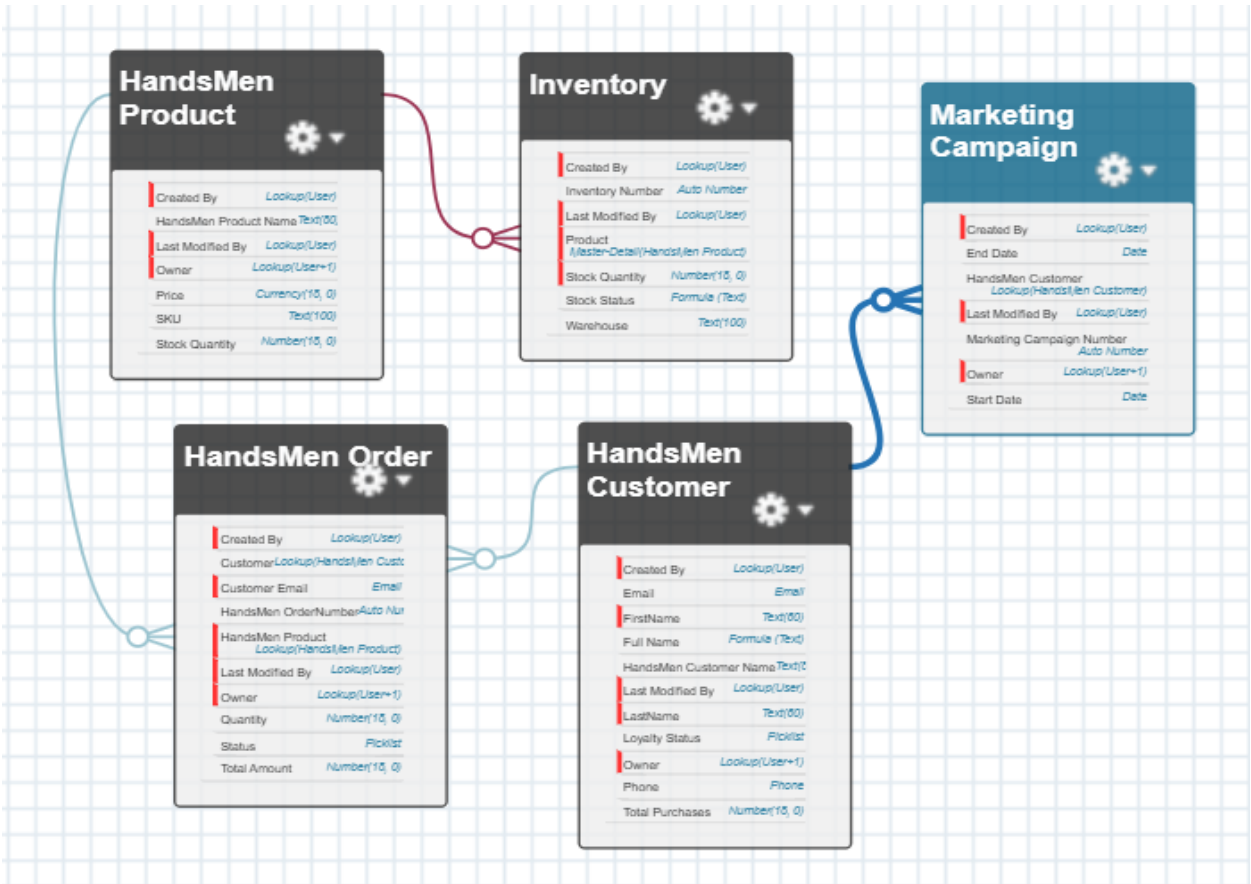**Phase 1: Requirement Analysis & Planning**

Understanding Business Requirements

- HandsMen Threads needs a centralized system to store customer information, order history, and loyalty program data. Current scattered data leads to inconsistent customer experiences.
- Customers currently lack on-time updates on orders. The Salesforce CRM will automate order confirmations through email to enhance engagement.
- The system will automatically alert the warehouse when stock drops below five units to prevent stockouts.
- Customer loyalty statuses need to update dynamically based on purchase history, enabling personalized rewards and repeat purchases.

Project Scope and Objectives

- Implement Salesforce CRM to cover customer information, orders, loyalty programs, inventory alerts, and bulk order updates.
- Integrate email automation for order confirmations and stock alerts.
- Ensure role-based access for staff (marketing, sales, inventory) with data security.
- Maintain data accuracy by using UI-based controls and validation rules.
- Automate key processes such as order confirmations, loyalty updates, stock alerts, bulk updates.
- Enhance operational efficiency and customer satisfaction.

Data Model (Custom Objects)

Security Model (Roles)

CEO   Edit | Del | Assign
  Add Role
    CFO   Edit | Del | Assign
      Add Role
    COO   Edit | Del | Assign
      Add Role
    Inventory   Edit | Del | Assign
      Add Role
    Marketing   Edit | Del | Assign
      Add Role
    Sales   Edit | Del | Assign
      Add Role

Stakeholders Mapping

Internal Stakeholders

- CEO
- Sales
- Inventory
- Marketing

External Stakeholders

- Customers

Phase 2: Salesforce Development – Backend & Configuration

Custom Objects and Fields (Screenshot)

HandsMen Customer

HandsMen Customer	
Created By	Lookup(User)
Email	Email
FirstName	Text(60)
Full Name	Formula (Text)
HandsMen Customer Name	Text(80)
Last Modified By	Lookup(User)
LastName	Text(60)
Loyalty Status	Picklist
Owner	Lookup(User+1)
Phone	Phone
Total Purchases	Number(18, 0)

HandsMen Product

HandsMen Product	
Created By	Lookup(User)
HandsMen Product Name	Text(80)
Last Modified By	Lookup(User)
Owner	Lookup(User+1)
Price	Currency(18, 0)
SKU	Text(100)
Stock Quantity	Number(18, 0)

HandsMen Order

HandsMen Order	
Created By	Lookup(User)
Customer	Lookup(HandsMen Customer
Customer Email	Email
HandsMen OrderNumber	Auto Number
HandsMen Product	Lookup(HandsMen Product)
Last Modified By	Lookup(User)
Owner	Lookup(User+1)
Quantity	Number(18, 0)
Status	Picklist
Total Amount	Number(18, 0)

Inventory

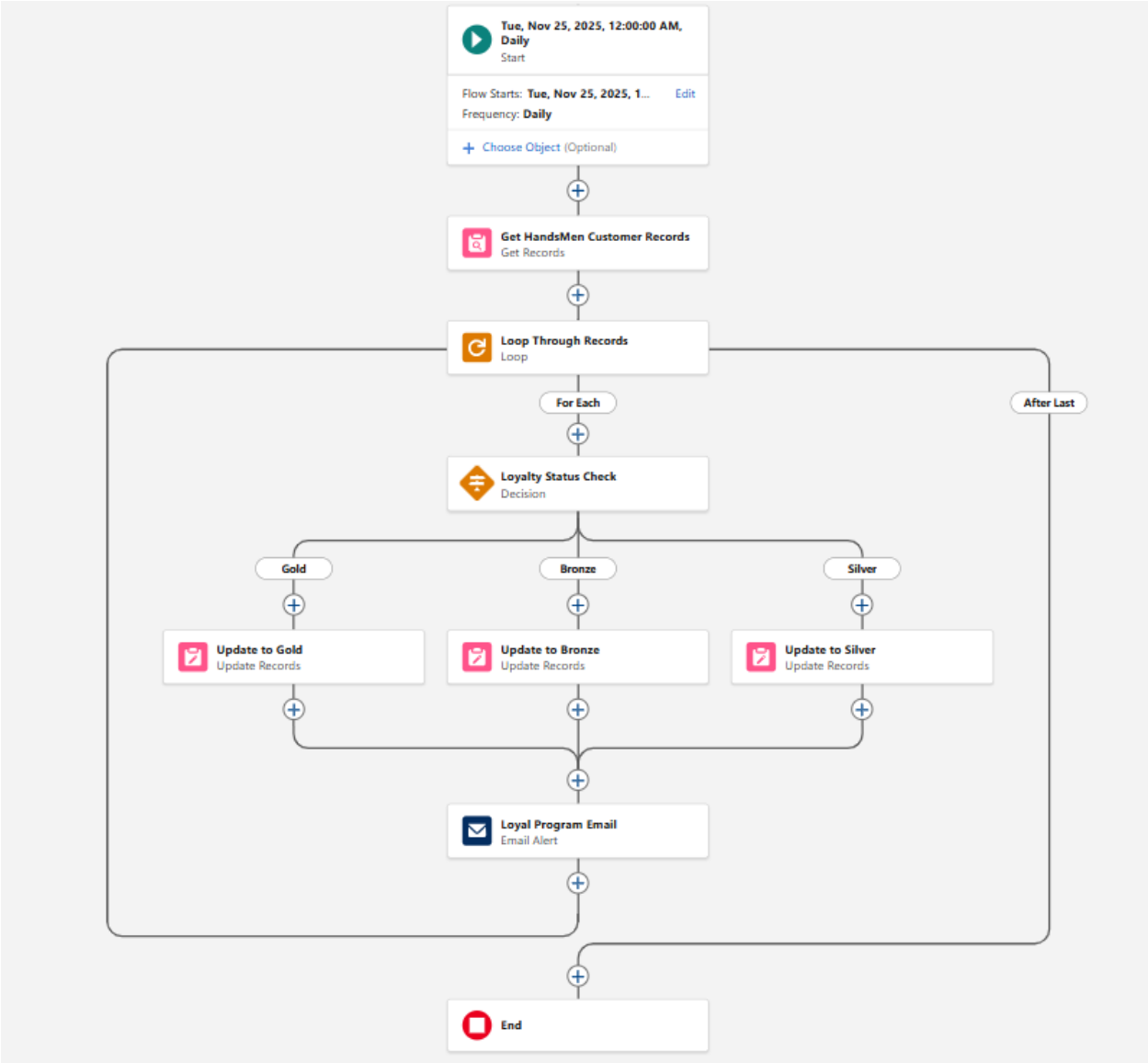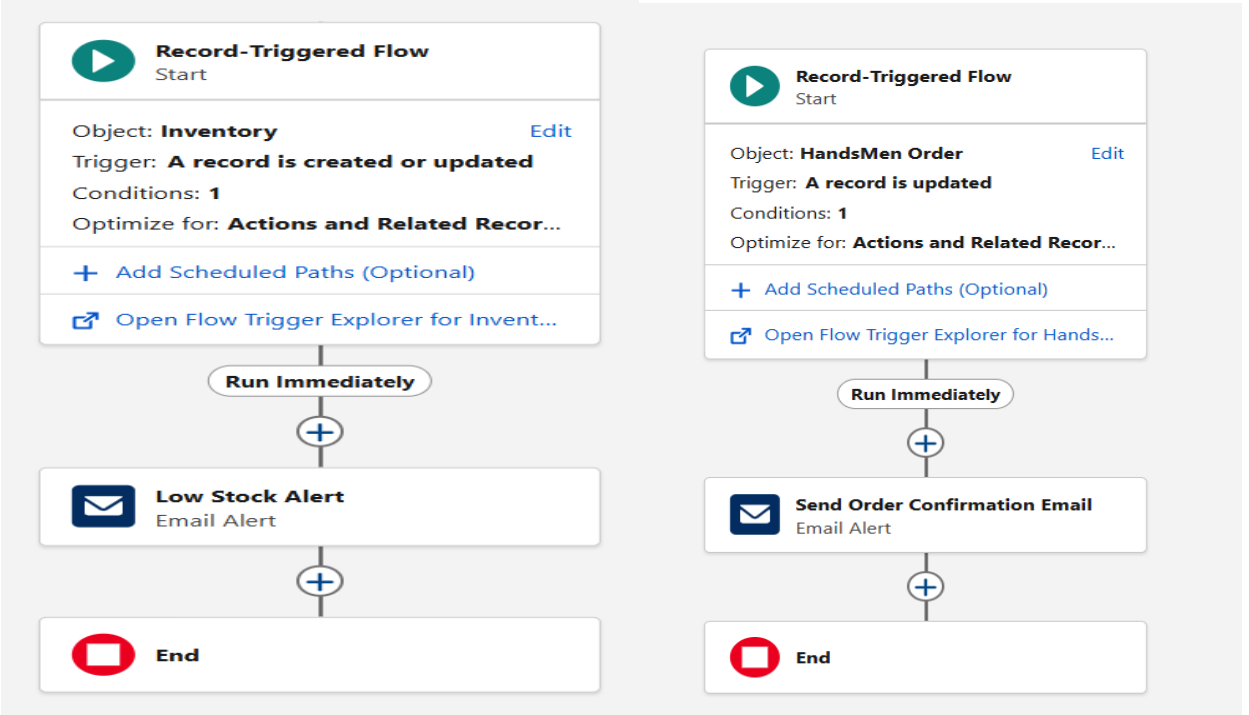| Inventory	
Created By	Lookup(User)
Inventory Number	Auto Number
Last Modified By	Lookup(User)
Product	Master-Detail(HandsMen Product)
Stock Quantity	Number(18, 0)
Stock Status	Formula (Text)
Warehouse	Text(100)

Marketing Campaign

Marketing Campaign	
Created By	Lookup(User)
End Date	Date
HandsMen Customer	Lookup(HandsMen Customer)
Last Modified By	Lookup(User)
Marketing Campaign Number	Auto Number
Owner	Lookup(User+1)
Start Date	Date

Validation Rules

- **Total Amount** – checks if the total amount of the order is less than or equal to zero preventing users to input those values.
- **Stock Quantity** – checks if the stock is less than or equal to zero preventing users to input those values.
- **Email** – Validation rules that checks if the input is a valid email or not.

Flows

- **Order Confirmation Flow** – record-triggered flow that will alert the customers if their order is confirmed
- **Stock Alert Flow** – record-triggered flow that will alert if the stock is lower than five.
- **Loyalty Status Flow** – scheduled-trigger flow that will alert and update the customers when their status is updated.

Record-Triggered Flow
Start

Object: **Inventory**   Edit
Trigger: **A record is created or updated**
Conditions: **1**
Optimize for: **Actions and Related Recor...**

+ Add Scheduled Paths (Optional)

↗ Open Flow Trigger Explorer for Invent...

Run Immediately

⊕

Low Stock Alert
Email Alert

⊕

⬭ End

Record-Triggered Flow
Start

Object: **HandsMen Order**   Edit
Trigger: **A record is updated**
Conditions: **1**
Optimize for: **Actions and Related Recor...**

+ Add Scheduled Paths (Optional)

↗ Open Flow Trigger Explorer for Hands...

Run Immediately

⊕

Send Order Confirmation Email
Email Alert

⊕

⬭ End

Tue, Nov 25, 2025, 12:00:00 AM, Daily
Start

Flow Starts: **Tue, Nov 25, 2025, 1...**   Edit
Frequency: **Daily**

+ Choose Object (Optional)

⊕

Get HandsMen Customer Records
Get Records

⊕

Loop Through Records
Loop

For Each   After Last

⊕

Loyalty Status Check
Decision

Gold   Bronze   Silver

⊕   ⊕   ⊕

Update to Gold   **Update to Bronze**   **Update to Silver**
Update Records   Update Records   Update Records

⊕   ⊕   ⊕

⊕

Loyal Program Email
Email Alert

⊕

⊕

⬭ End

Apex

OrderTotalTrigger – Trigger that updates and computes the total price of the order.

```apex
// Trigger that calculates the total_amount of the order
trigger OrderTotalTrigger on HandsMen_Order__c (before insert, before update) {

    Set<Id> productIds = new Set<Id>();

    for (HandsMen_Order__c order : Trigger.new) {
        if (order.HandsMen_Product__c != null) {
            productIds.add(order.HandsMen_Product__c);
        }
    }

    Map<Id, HandsMen_Product__c> productMap = new Map<Id, HandsMen_Product__c>(
        [SELECT Id, Price__c FROM HandsMen_Product__c WHERE Id IN :productIds]
    );

    for (HandsMen_Order__c order : Trigger.new) {
        if (order.HandsMen_Product__c != null && productMap.containsKey(order.HandsMen_Product__c)) {
            HandsMen_Product__c product = productMap.get(order.HandsMen_Product__c);
            if (order.Quantity__c != null) {
                order.Total_Amount__c = order.Quantity__c * product.Price__c;
            }
        }
    }
}
```

StockDeductionTrigger – Trigger that deduct stocks automatically.

```apex
trigger StockDeductionTrigger on HandsMen_Order__c (after insert, after update) {
    Set<Id> productIds = new Set<Id>();

    for (HandsMen_Order__c order : Trigger.new) {
        if (order.Status__c == 'Confirmed' && order.HandsMen_Product__c != null) {
            productIds.add(order.HandsMen_Product__c);
        }
    }

    if (productIds.isEmpty()) return;

    // Query related inventories based on product
    Map<Id, Inventory__c> inventoryMap = new Map<Id, Inventory__c>(
        [SELECT Id, Stock_Quantity__c, Product__c
         FROM Inventory__c
         WHERE Product__c IN :productIds]
    );

    List<Inventory__c> inventoriesToUpdate = new List<Inventory__c>();

    for (HandsMen_Order__c order : Trigger.new) {
        if (order.Status__c == 'Confirmed' && order.HandsMen_Product__c != null) {
            for (Inventory__c inv : inventoryMap.values()) {
                if (inv.Product__c == order.HandsMen_Product__c) {
                    inv.Stock_Quantity__c -= order.Quantity__c;
                    inventoriesToUpdate.add(inv);
                    break;
                }
            }
        }
    }

    if (!inventoriesToUpdate.isEmpty()) {
        update inventoriesToUpdate;
    }
}
```

OrderTriggerHandler – Class that handles the order trigger.

```apex
public class OrderTriggerHandler {

    public static void validateOrderQuantity(List<HandsMen_Order__c> orderList) {

        for (HandsMen_Order__c order : orderList) {
            if (order.Status__c == 'Confirmed') {
                if (order.Quantity__c == null || order.Quantity__c <= 500) {
                    order.Quantity__c.addError('For Status "Confirmed", Quantity must be more than 500.');
                }
            } else if (order.Status__c == 'Pending') {
                if (order.Quantity__c == null || order.Quantity__c <= 200) {
                    order.Quantity__c.addError('For Status "Pending", Quantity must be more than 200.');
                }
            } else if (order.Status__c == 'Rejection') {
                if (order.Quantity__c == null || order.Quantity__c != 0) {
                    order.Quantity__c.addError('For Status "Rejection", Quantity must be 0.');
                }
            }
        }

        System.debug('All records validated successfully.');
    }

}
```

OrderTrigger - Trigger that handles the order.

```apex
trigger OrderTrigger on HandsMen_Order__c (before insert, before update) {

    if (Trigger.isBefore && (Trigger.isInsert || Trigger.isUpdate)) {

        OrderTriggerHandler.validateOrderQuantity(Trigger.new);

    }
}
```

InventoryBatchJob – Class that handles the restock of the inventory and its scheduled using cron syntax.

```apex
global class InventoryBatchJob implements Database.Batchable<SObject>, Schedulable {
    global Database.QueryLocator start(Database.BatchableContext BC) {
        return Database.getQueryLocator(
            'SELECT Id, Stock_Quantity__c FROM Product__c WHERE Stock_Quantity__c < 10'
        );
    }

    global void execute(Database.BatchableContext BC, List<SObject> records) {
        List<HandsMen_Product__c> productsToUpdate = new List<HandsMen_Product__c>();

        // Cast SObject list to Product__c list

        for (SObject record : records) {

            HandsMen_Product__c product = (HandsMen_Product__c) record;

            product.Stock_Quantity__c += 50; // Restock logic

            productsToUpdate.add(product);

        }

        if (!productsToUpdate.isEmpty()) {

            try {

                update productsToUpdate;

            } catch (DmlException e) {
                System.debug('Error updating inventory: ' + e.getMessage());
            }
        }
    }

    global void finish(Database.BatchableContext BC) {
        System.debug('Inventory Sync Completed');
    }

    // Scheduler Method

    global void execute(SchedulableContext SC) {
        InventoryBatchJob batchJob = new InventoryBatchJob();
        Database.executeBatch(batchJob, 200);
    }
}
```

Phase 3: UX/UI Development & Customization

Lightning App – HandsMen Threads App to manage Customers, Orders, Products, and Marketing Campaigns.
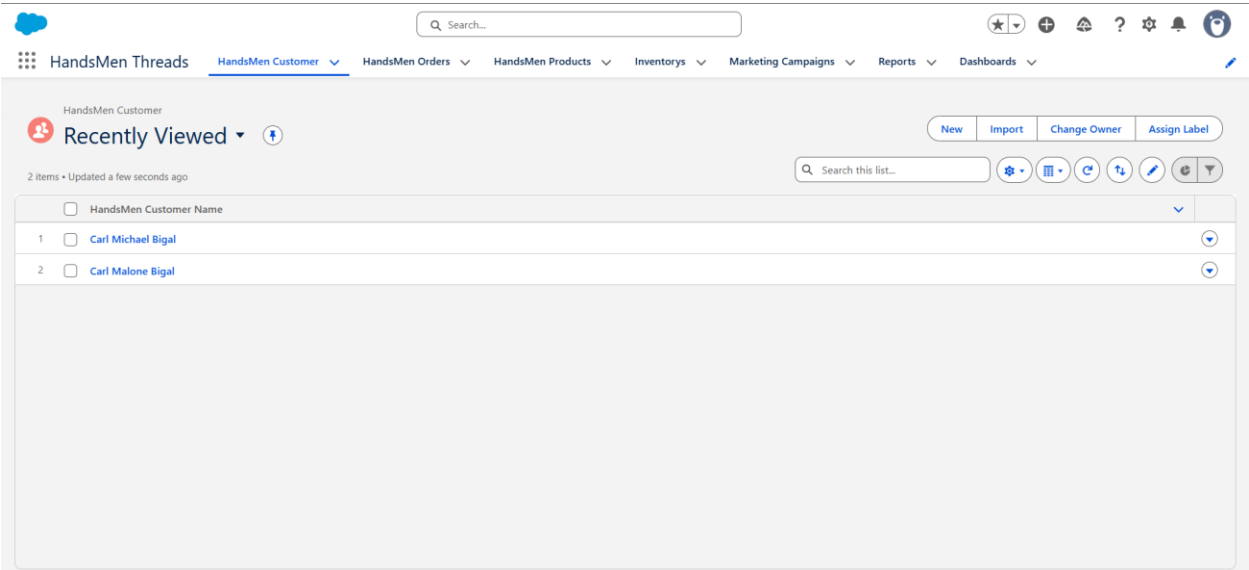
HandsMen Customer – For customer Information
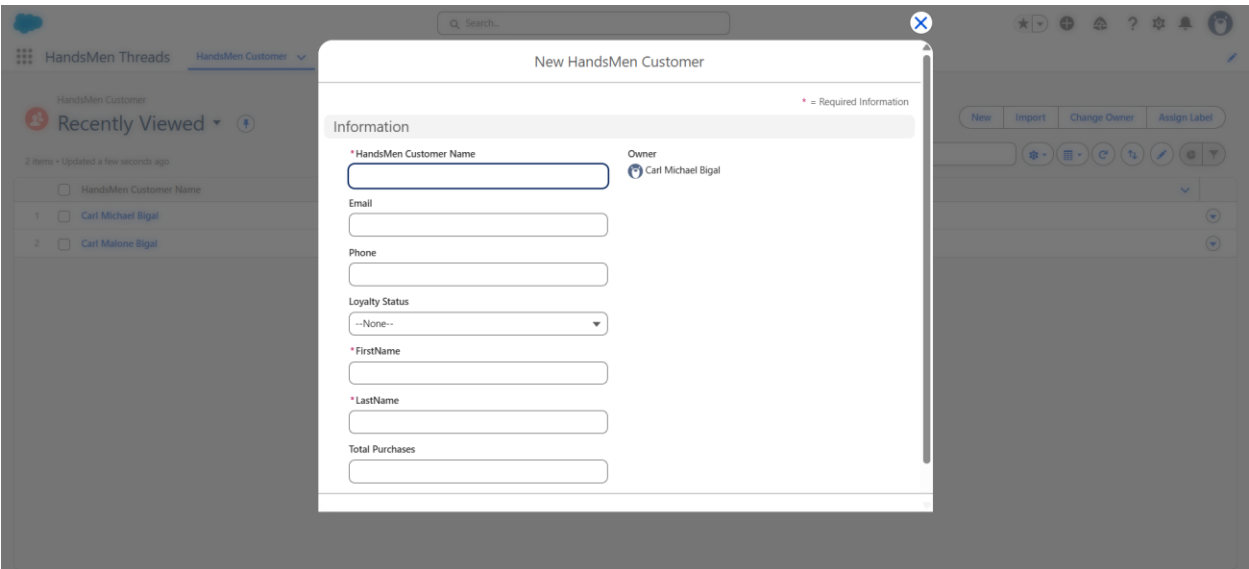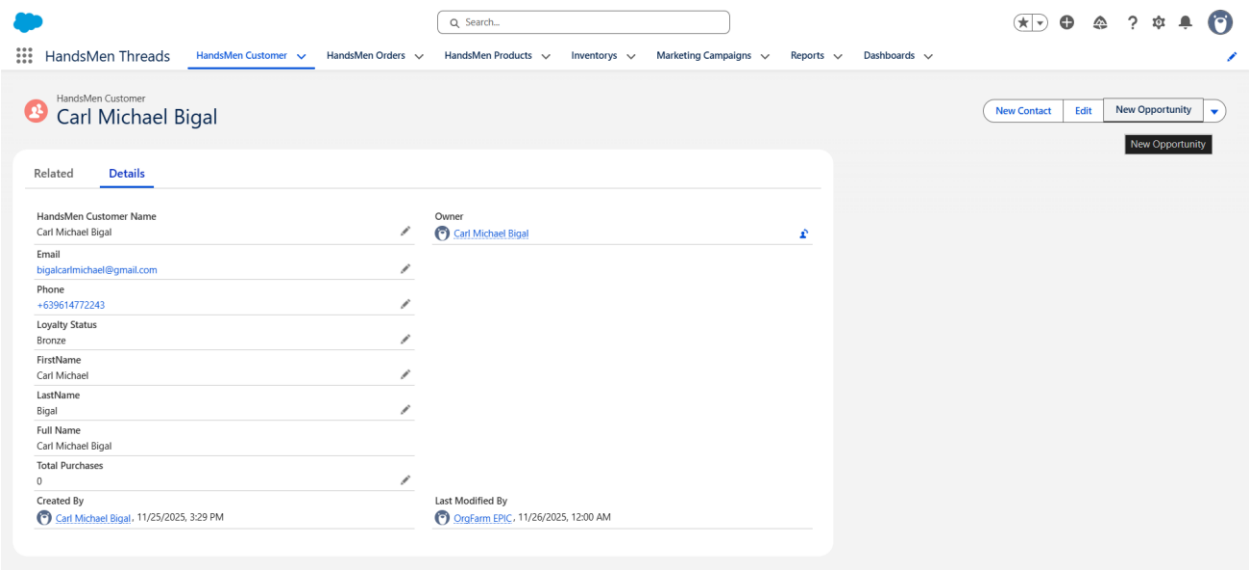
HandsMen Order – Customer order transactions.

HandsMen Product – Products that can be buy.

Inventorys – Inventories of products

Marketing Campaigns – Details for marketing campaigns of the customers.
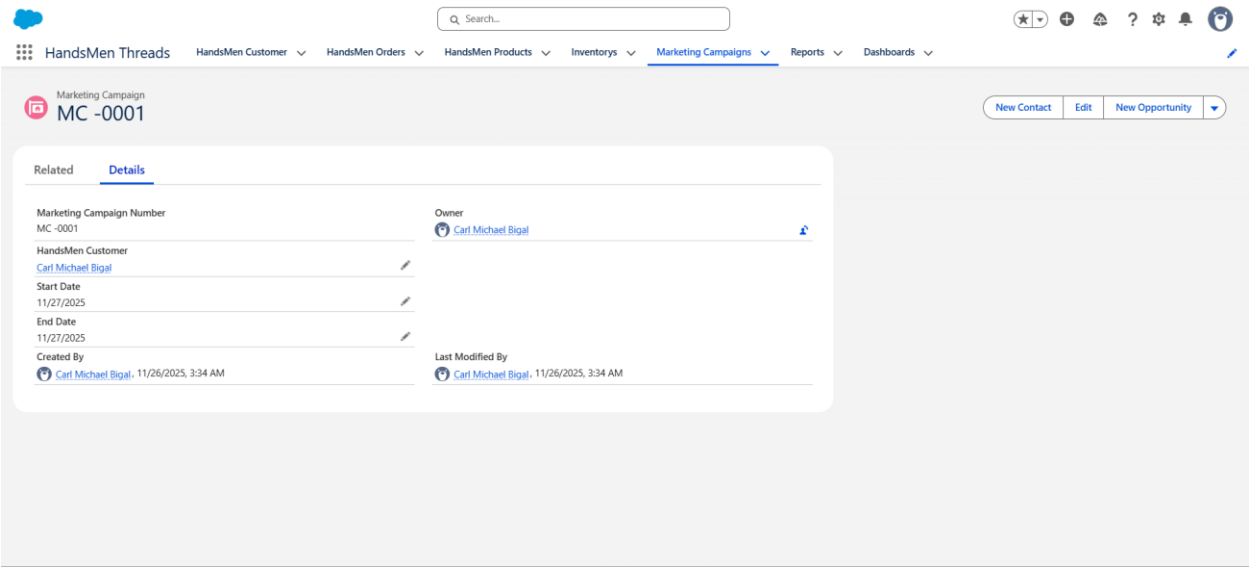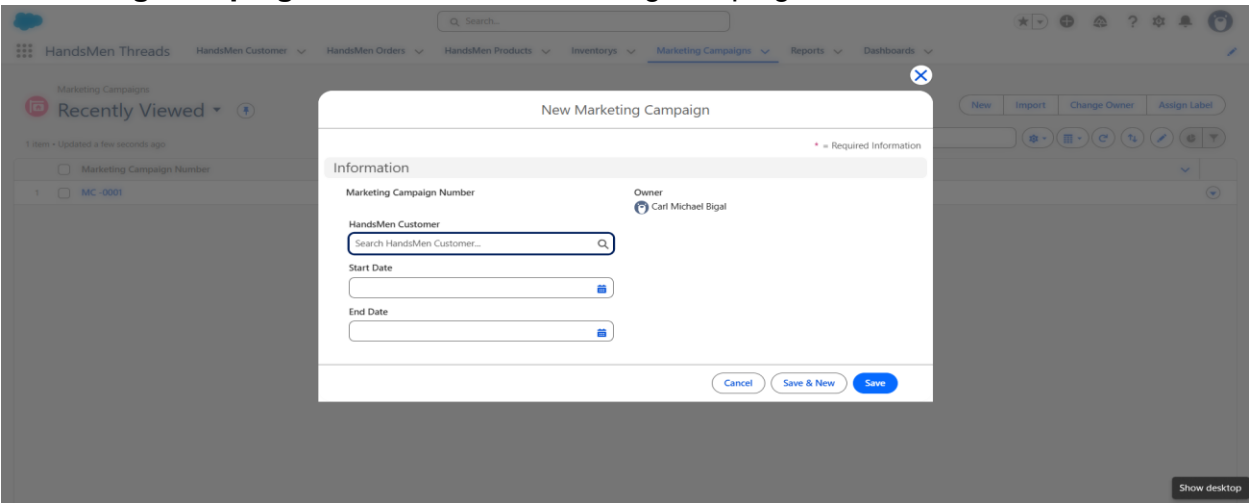
Phase 4: Data Migration, Testing & Security

Profiles

- **Platform 1** – Clone the Standard User profile to create the Platform 1 Profile for the following roles: Sales, Inventory, and Marketing.

Roles and Roles Hierarchy

- **CEO** – The highest role in the entire organization.
  - **Sales** – Works under the CEO and handles the sales of the organization
  - **Inventory** – Works under the CEO and handles the inventory tracking of products.
  - **Marketing** – Works under the CEO and handles the marketing campaigns of the organization.

Permission Sets

- **Sales Permission Set** – Sales Manager has full access to customers and orders
- **Inventory Permission Set** – Inventory Manager can read and edit on inventory and products.
- **Marketing Permission Set** – Marketing Manager can read on customers and edit on marketing campaigns.

User Interfaces (HandsMen Threads)

HandsMen Customer

Related | **Details**

HandsMen Customer Name
Kenneth Bigal ✎

Owner
👤 Carl Michael Bigal

Email
bigalcarlmichael@gmail.com ✎

Phone
+639614772243 ✎

Loyalty Status ✎

FirstName
Kenneth ✎

LastName
Bigal ✎

Full Name
Kenneth Bigal

Total Purchases ✎

Created By
👤 Carl Michael Bigal, 11/26/2025, 5:02 AM

Last Modified By
👤 Carl Michael Bigal, 11/26/2025, 5:02 AM

HandsMen Order

HandsMen Products ⌄ Inventorys ⌄ Marketing Campaigns ⌄ Reports ⌄ Dashboards ⌄   ✕

New HandsMen Order

* = Required Information

Information

HandsMen OrderNumber

Owner
👤 Carl Michael Bigal

Customer ↩
👥 Kenneth Bigal ✕

Status ↩
Pending ▾

Quantity ↩
201

Total Amount

* HandsMen Product ↩
🖥 T-shirt ✕

* Customer Email ↩
bigalcarlmichael2003@gmail.com

Cancel   Save & New   **Save**

Save

HandsMen Order
O-0011

✓ HandsMen Order "O-0011" was created. ✕

Related | **Details**

HandsMen OrderNumber
O-0011

Customer
Kenneth Bigal ✎

Status
Pending ✎

Quantity
201 ✎

Total Amount
603 ✎

HandsMen Product
T-shirt ✎

Customer Email
bigalcarlmichael2003@gmail.com ✎

Created By
Carl Michael Bigal, 11/26/2025, 5:03 AM

Owner
Carl Michael Bigal ↰

Last Modified By
Carl Michael Bigal, 11/26/2025, 5:03 AM

HandsMen Product

✕

New HandsMen Product

* = Required Information

Information

*HandsMen Product Name ↶
Watch

SKU

Price ↶
$100

Stock Quantity ↶
1000

Owner
Carl Michael Bigal

Cancel | Save & New | Save

HandsMen Product
Watch

✓ HandsMen Product "Watch" was created. ✕

Related | **Details**

HandsMen Product Name
Watch ✎

SKU ✎

Price
$100 ✎

Stock Quantity
1,000 ✎

Created By
Carl Michael Bigal, 11/26/2025, 5:04 AM

Owner
Carl Michael Bigal ↰

Last Modified By
Carl Michael Bigal, 11/26/2025, 5:04 AM

Inventorys

New Inventory

* = Required Information

Information

Inventory Number

* Product

🖥 Watch ✕

* Stock Quantity

1,000

Warehouse

Warehouse 1

Cancel Save & New Save

Inventory
I -0003

✓ Inventory "I -0003" was created. ✕

Related   **Details**

Inventory Number
I -0003

Product
Watch

Stock Quantity
1,000 ✏

Stock Status
Available

Warehouse
Warehouse 1 ✏

Created By
Carl Michael Bigal, 11/26/2025, 5:05 AM

Last Modified By
Carl Michael Bigal, 11/26/2025, 5:05 AM

Marketing Campaigns

New Marketing Campaign

* = Required Information

Information

Marketing Campaign Number

Owner
Carl Michael Bigal

HandsMen Customer

👤 Kenneth Bigal ✕

Start Date

11/27/2025 📅

End Date

11/28/2025 📅

Format: 12/31/2024

Cancel Save & New Save

Save

Marketing Campaign "MC -0002" was created.   ×

Related   **Details**

Marketing Campaign Number
MC -0002

Owner
Carl Michael Bigal

HandsMen Customer
Kenneth Bigal

Start Date
11/27/2025

End Date
11/28/2025

Created By
Carl Michael Bigal, 11/26/2025, 5:06 AM

Last Modified By
Carl Michael Bigal, 11/26/2025, 5:06 AM

Email Alerts (Trigger and Scheduled Flow outputs)

Loyalty Program

Congratulations! You are now a Bronze member and you are eligible for our Loyalty Rewards Program.
Enjoy exclusive discounts, early access to offers, and special member benefits.
Thank you for your continued Support.

Low Stock Alert

Dear Inventory Manager,
This is to inform you that the stock for the following product is running low:
Product Name: Watch
Current Stock Quantity: 4
Please take the necessary steps to restock this item immediately.
Best Regards,
Inventory Monitoring System

Order Confirmation Alert

Dear Kenneth Bigal,

Your order #O-0011 has been confirmed!

Thank you for shopping with us.

Best Regards,

Sales Team

Phase 5: Deployment, Documentation, and Maintenance

Deployment Strategy

- Configuration, automation workflows, validation rules, data model modifications, and email templates will all be moved from the Sandbox to Production using Change Sets.
- Complete all test cycles.
- Create backup key production data before final migration.

System Maintenance and Monitoring

- Review and updates of automation flows regularly to ensure that they remain aligned with operational changes.
- Use Salesforce Setup Audit Trail to track configuration changes.
- Utilize the error logs in Flow and Apex.
- Monthly system health checks.

Troubleshooting Documentation Steps

- Identify the Issues
- Check Logs and Error Messages
- Verify Data Conditions
- Apply Fixes
- Document Resolutions

Conclusion

In conclusion, the Salesforce CRM implementation for HandsMen Threads represents the strategic step toward modernizing their operations, strengthening customer relationships, and ensuring long-term business growth. This project is not just only to resolve the current operational challenges, but it also helps position the HandsMen Threads to adapt quickly to the evolving customer expectations and market demands. The implementation marks the significant advancement in the company's digital transformation journey, ensuring a more smoother workflow automation, more enhanced customer satisfaction, and more improved overall business performance.