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

PROJECT OVERVIEW

This paper introduces HandsMen Threads: Elevating the Art of Sophistication in Men's Fashion, a project focused on modernizing the company's operations through Salesforce CRM. As the business expands, managing customer records, orders, and personalized services has become more challenging, especially with manual processes slowing down productivity and creating data inconsistencies. With the adoption of Salesforce CRM, the organization centralizes its data into one scalable system, enabling automation, reliable tracking, timely communication, and personalized loyalty features, all designed to improve efficiency and enhance the overall customer experience.

OBJECTIVES

The core goal of this initiative is to deploy a fully customized and scalable Salesforce CRM solution designed to underpin our critical operational requirements. This project is fundamentally about creating a unified, reliable platform that consolidates essential business data, including customer profiles, orders, and inventory into a single source of truth.

By leveraging advanced automations, such as immediate order confirmations, proactive low-inventory notifications, systematic loyalty program communications, and scheduled data processing, the new CRM will dramatically cut down on repetitive manual tasks and eliminate costly human errors, resulting in significantly accelerated and more reliable business workflows.

Expected Business Deliverables:

- **Elevated Customer Experience -** Drive retention and satisfaction through timely, automated, and personalized communications.

- **Operational Excellence -** Achieve maximum efficiency by automating routine tasks and accelerating end-to-end workflows.

- **Precise Inventory Control -** Ensure stock accuracy and reduce business friction caused by shortages, delays, or overstocking.

- **Accelerated Throughput** - Streamline and speed up the entire order-to-fulfillment process.

- **Data-Driven Decisions** - Empower leadership and teams with consistent, real-time data for stronger strategic and tactical choices.

- **Future-Proof Scalability-** Establish a system architecture capable of supporting the business's long-term growth and evolving needs.

PHASE 1: REQUIREMENT ANALYSIS AND PLANNING

Business Requirements

HandsMen Threads has identified a critical need to modernize its CRM capabilities to bridge the gap between operational workflows and customer engagement. Currently, the business is hampered by manual bottlenecks, specifically in order confirmation, inventory tracking, and bulk processing, which lead to data inconsistencies and delayed responses.

To resolve this, the proposed Salesforce solution prioritizes data integrity at the source, ensuring that all input via the user interface is validated and reliable. The system will introduce intelligent automation to handle the heavy lifting: sending instant order confirmations, dynamically updating loyalty tiers based on purchasing behavior, and triggering warehouse alerts for low stock. By automating these touchpoints, HandsMen Threads will secure a more efficient operational model that minimizes human error and maximizes customer satisfaction.

Project Scope and Objective

The HandsMen Threads Salesforce CRM project aims to deliver the following technical solutions to achieve specific business outcomes:

- Centralization of Customer, Order, and Inventory data into a single Salesforce environment to ensure data accuracy, eliminate silos, and support reliable, real-time decision-making.

- Implementation of workflows for order confirmations, tiered loyalty updates (Bronze/Silver/Gold), and low-stock alerts to enhance customer engagement and prevent stock shortages while reducing manual error.

- Development of scheduled batch processes and backend Apex logic to streamline end-of-day operations and efficiently handle high-volume updates.

- Configuration of custom Objects, Fields, and Page Layouts with strict validation rules to ensure data integrity is maintained at the source (the UI) and workflows match specific business needs.

- Deployment of real-time dashboards and reporting tools to provide leadership with instant operational insights and inventory tracking capabilities.

- Delivery of a robust, scalable architecture alongside comprehensive user training to ensure smooth adoption immediately and support the business's future growth.

Data Model

During planning, an Entity-Relationship Diagram is developed to visualize the relationship and fields of each entity or objects to make the project data relationship clear and normalized.
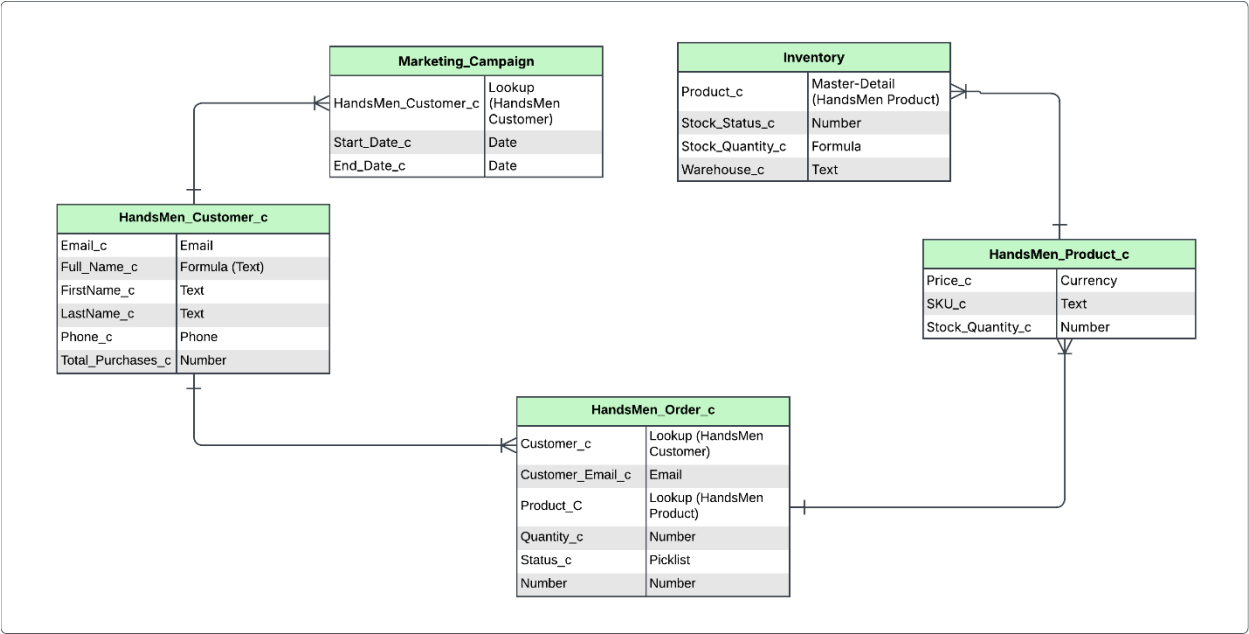
Security Model

To implement security in the CRM, a security model defining the access control of the users and the customer is developed.

Role	Permission	Access
Sales Manager	Read, Create, Edit	Customers and Orders
Inventory Manager	Read, Create, Edit	Marketing campaigns
Marketing Manager	Read, Edit	Inventory and Products

PHASE 2: SALESFORCE DEVELOPMENT – BACKEND AND CONFIGURATIONS

Environment Setup and DevOps Workflow
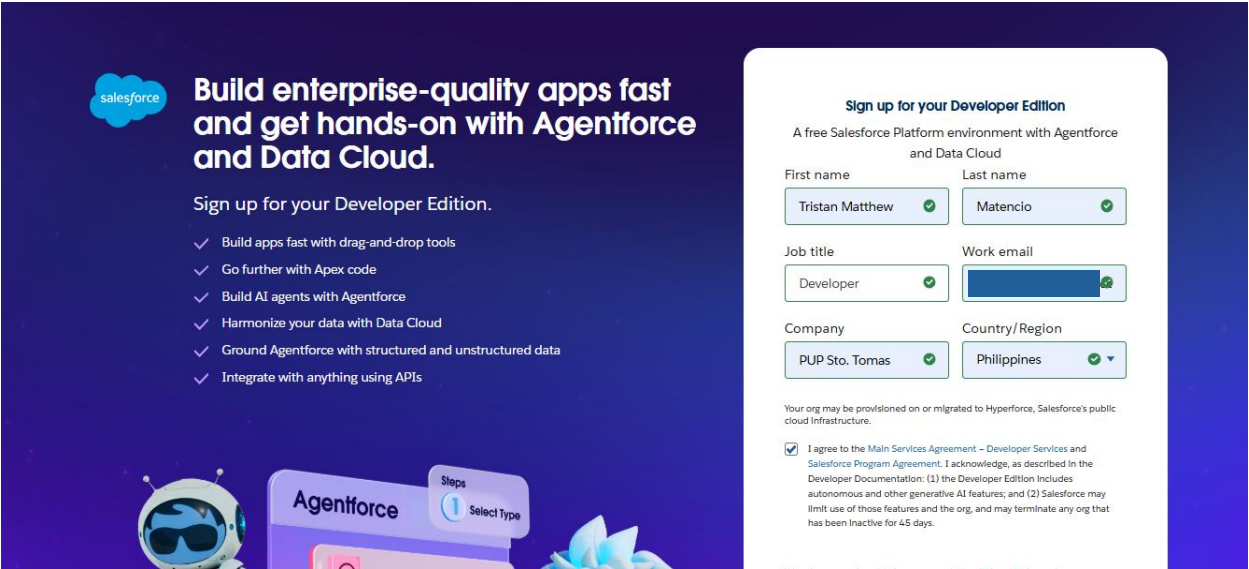
To setup the environment, a developer edition playground is used provided by Salesforce. An email is sent to confirmed and verify the account and password was reset to grant access to the playground.

Customization of Objects, Fields, Validation Rules, Automation

The following custom objects were created for the project:

- **HandsMen Order** – Stored order details such as product name, order status, and total amount.

- **HandsMen Product** – Stored product details such as product name, price, SKU, and quantity.

- **HandsMen Customer –** Stored the customer details such as contact number, name, email, loyalty status, and total purchases.

- **Inventory –** Stored the inventory details such as product, stock quantity, and warehouse location.

- **Marketing Campaign –** Stored the marketing campaign and promotions including customer name, start date, and end date.

Validation Rules

The following validation rules were set to ensure data accuracy and stock management.

Object	Validation Rule
HandsMen Order	If total amount is less than 0, return
HandsMen Customer	If email does not contain 'gmail.com', return
Inventory	If stock quantity is less than 0, return

Automation Flows

1. **Low Stock Alert** – Uses a record-trigger flow that is triggered when stock quantity is less than 5, then sends an email to inventory manager.
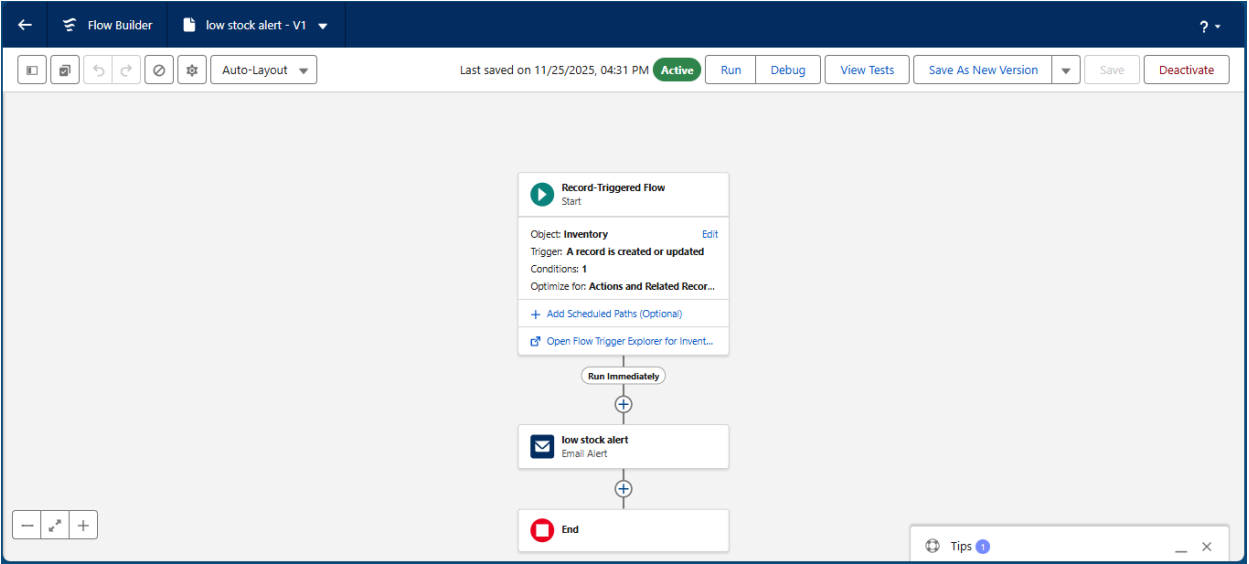
2. **Order Confirmed** – Once an order is confirmed, send an email to customer.
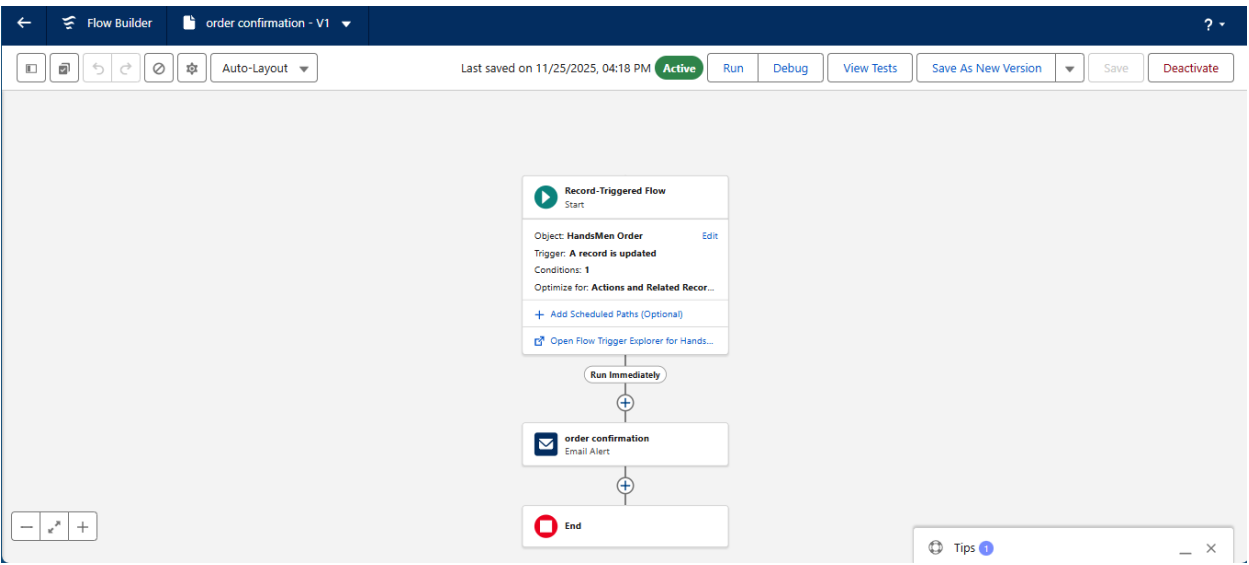
- **Loyalty Status Update** – Once a total purchases reaches certain amount, loyalty status changes into Bronze, Silver, or Gold.
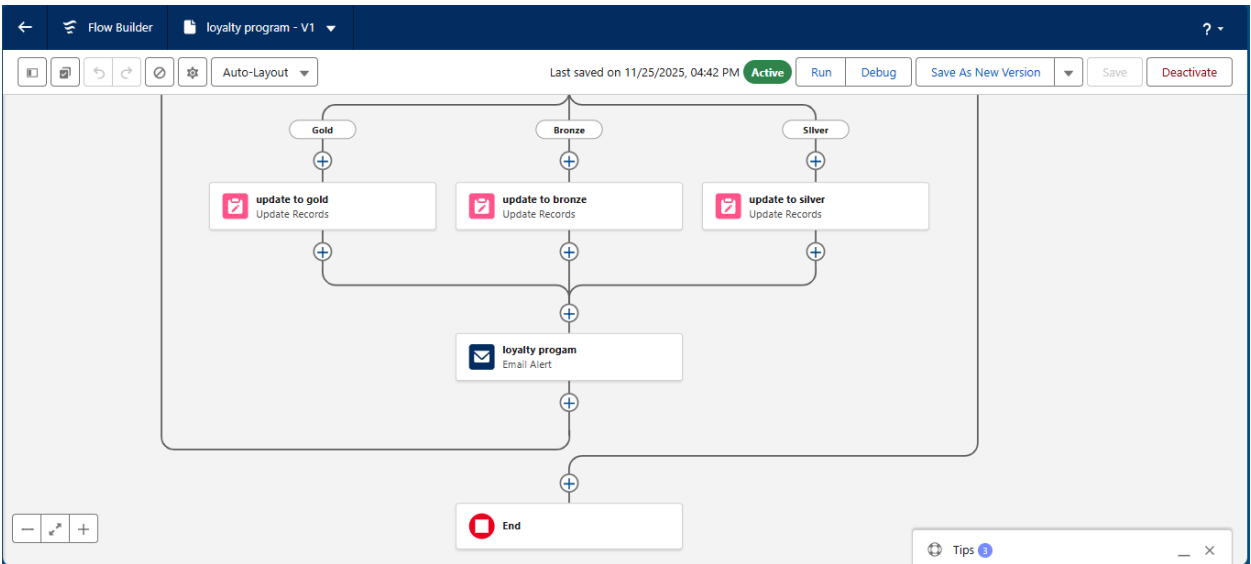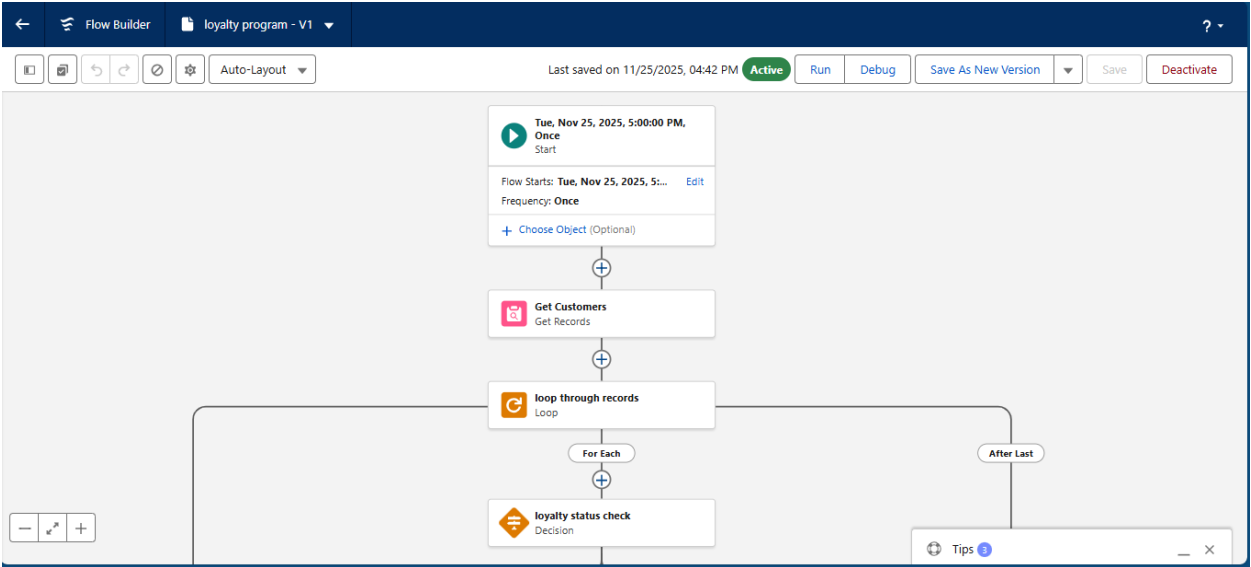
Apex Classes and Triggers

1. **Order Total Trigger**

```apex
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;
            }
        }
    }
}
```

2. Stock Deduction Trigger

```
1  ▾ trigger StockDeductionTrigger on HandsMen_Order__c (after insert, after update) {
2        Set<Id> productIds = new Set<Id>();
3
4  ▾     for (HandsMen_Order__c order : Trigger.new) {
5  ▾         if (order.Status__c == 'Confirmed' && order.HandsMen_Product__c != null) {
6                 productIds.add(order.HandsMen_Product__c);
7             }
8         }
9
10        if (productIds.isEmpty()) return;
11
12        Map<Id, Inventory__c> inventoryMap = new Map<Id, Inventory__c>(
13  ▾         [SELECT Id, Stock_Quantity__c, HandsMen_Product__c
14             FROM Inventory__c
15             WHERE HandsMen_Product__c IN :productIds]
16        );
17
18        List<Inventory__c> inventoriesToUpdate = new List<Inventory__c>();
19
20  ▾     for (HandsMen_Order__c order : Trigger.new) {
21  ▾         if (order.Status__c == 'Confirmed' && order.HandsMen_Product__c != null) {
22  ▾             for (Inventory__c inv : inventoryMap.values()) {
23  ▾                 if (inv.HandsMen_Product__c == order.HandsMen_Product__c) {
24                         inv.Stock_Quantity__c -= order.Quantity__c;
25                         inventoriesToUpdate.add(inv);
                           break;
```

3. Inventory Batch Job Class

```
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
21   HandsMen_Product__c product = (HandsMen_Product__c) record;
22
23   product.Stock_Quantity__c += 50; // Restock logic
24
25   productsToUpdate.add(product);
26
27   }
28
29 ▾ if (!productsToUpdate.isEmpty()) {
30
```

PHASE 3: UI/UX DEVELOPMENT AND CUSTOMIZATION

Lightning App Setup

Page Layouts and Dynamic Forms

1. HandsMen Product

New HandsMen Product

* = Required Information

Information

* HandsMen Product Name

Owner
🔵 Tristan Matthew Matencio

HandsMen Order

Search HandsMen Orders... 🔍

SKU

Price

Stock Quantity

Cancel | Save & New | Save

---

2. HandsMen Order

New HandsMen Order

* = Required Information

Information

HandsMen OrderNumber

Owner
🔵 Tristan Matthew Matencio

HandsMen Customer

Search HandsMen Customer... 🔍

HandsMen Product

Search HandsMen Products... 🔍

Status

--None-- ▼

Quantity

Total Amount

* Customer Email

Cancel | Save & New | Save

3. HandsMen Customer

4. Inventory

5. Marketing Campaign

User Management

1. **Niklaus Mikaelson –** Set the role to be Sales Manager.

2. **Kol Mikaelson –** Set the role to be Inventory Manager

3. Daniel Mikaelson – Set the role to be Marketing Manager

Reports and Dashboard

1. **Reports-** Displayed the user interface for showing reports for customer list, orders, products, inventories, and marketing campaign.

2. **Dashboard –** Displayed the user interface for showing dashboard for customer list, orders, products, inventories, and marketing campaign.

Lightning Pages

Lightning pages has been created to design the user interface using drag and drop components available in the lightning app builder.

1. **HandsMen Customer**
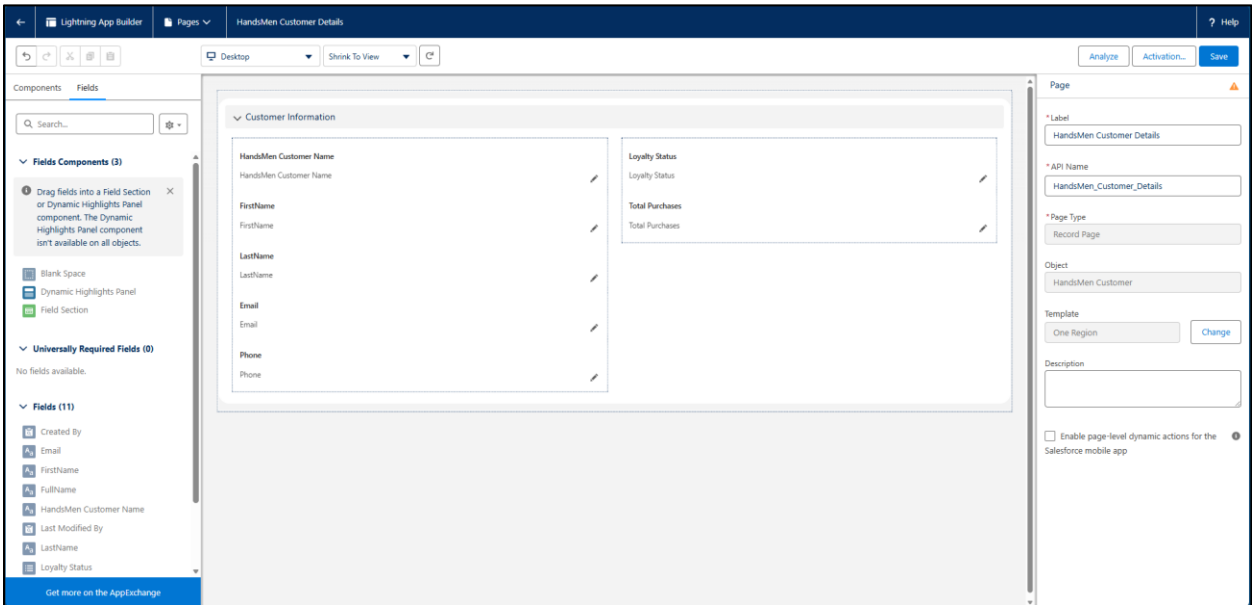
2. **HandsMen Product**
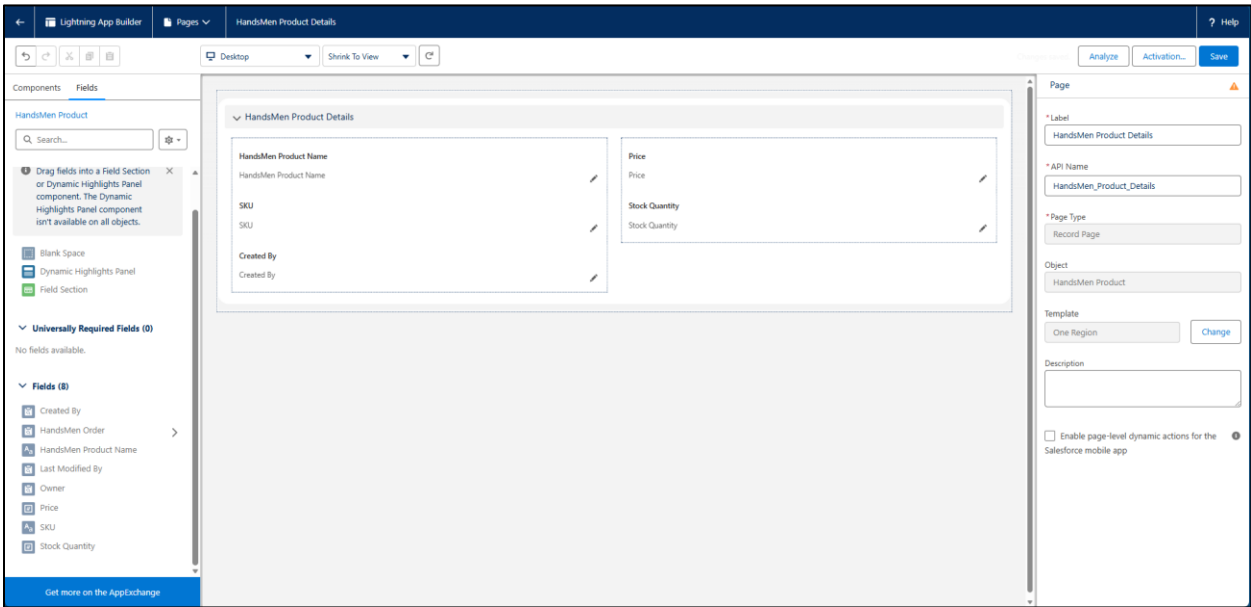
3. HandsMen Order
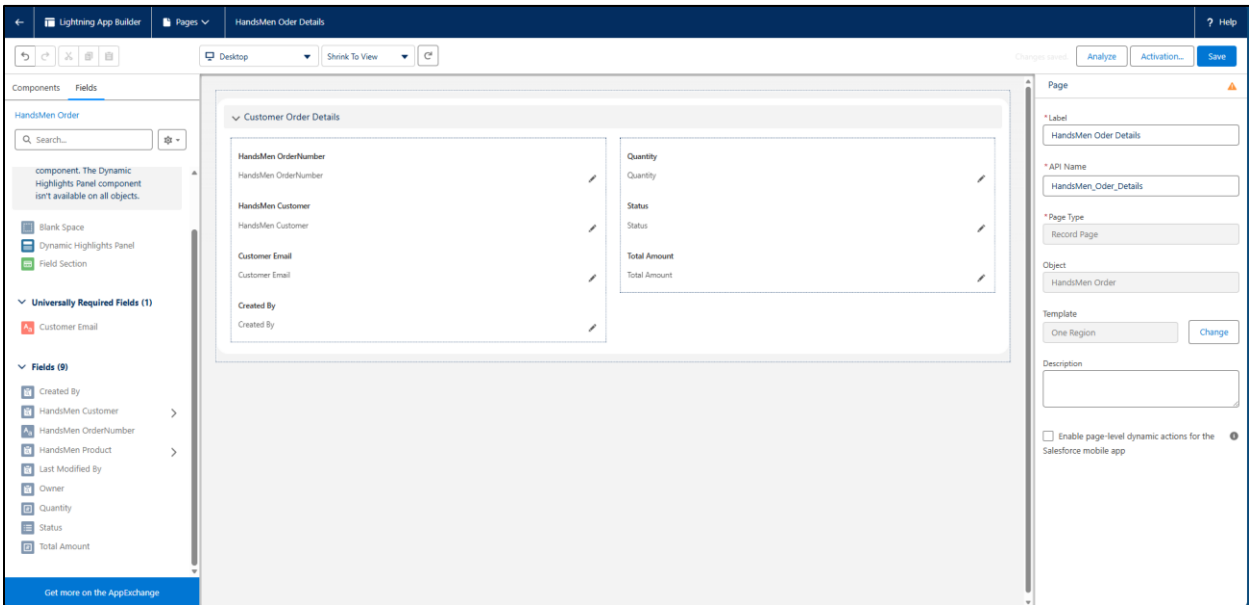
4. Inventory
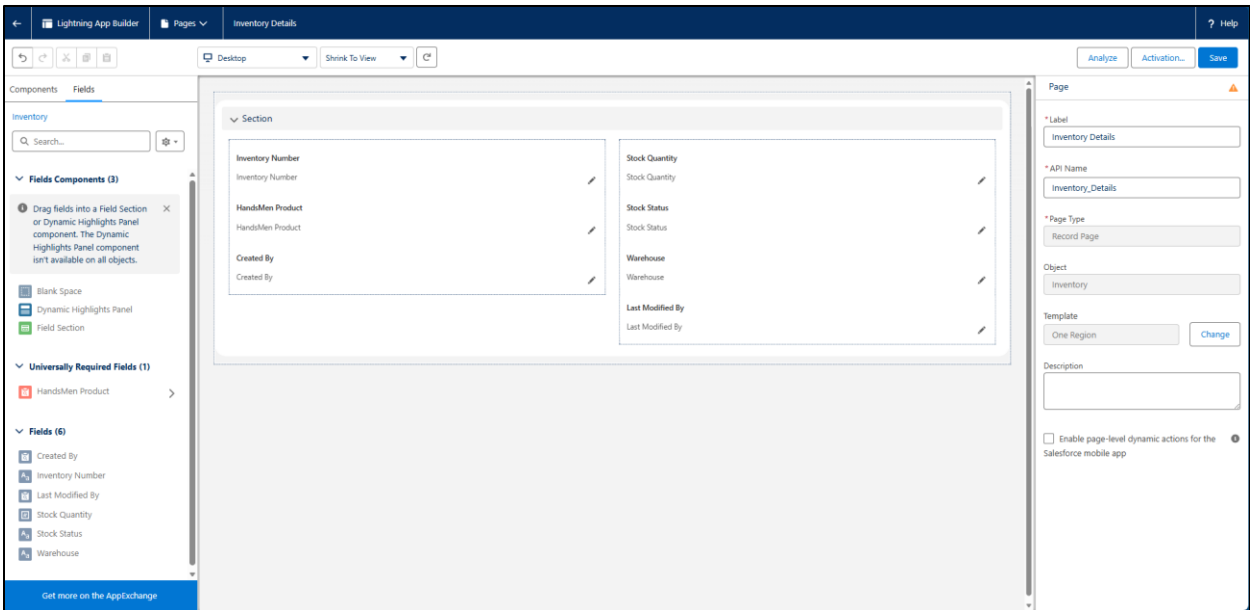
5. Marketing Campaign
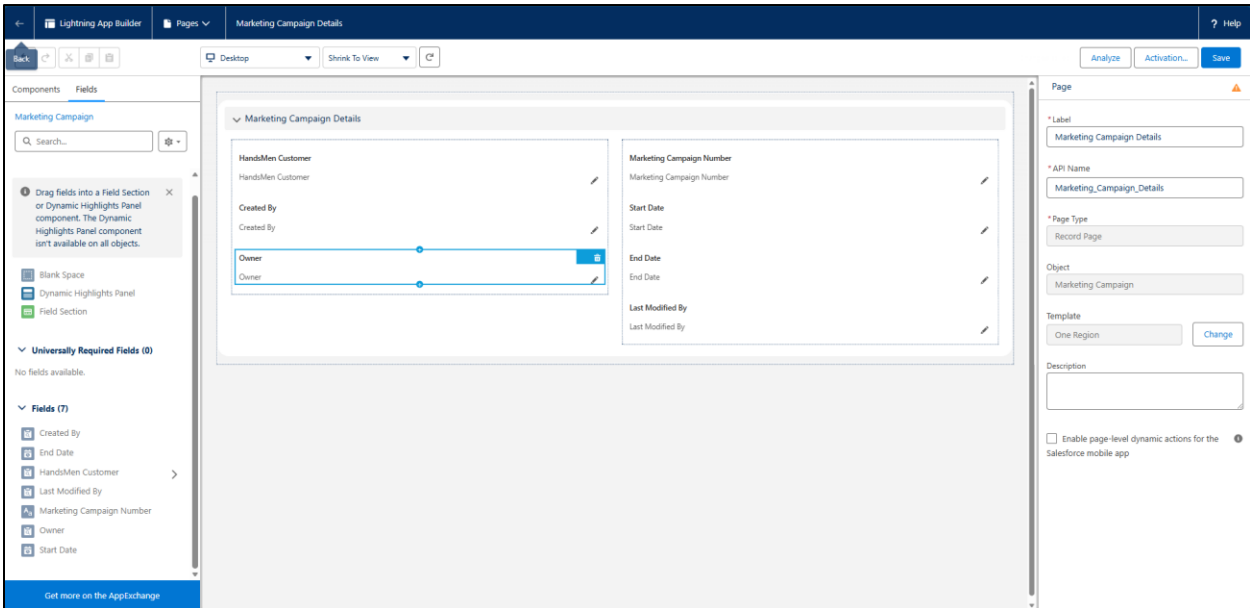
PHASE 4: DATA MIGRATION, TESTING AND SECURITY

Profile and Roles

Standard Salesforce profiles, including **Standard User** and **System Administrator**, were used to manage access within the system. The System Administrator profile allowed full visibility and control over all configurations, settings, and data, enabling complete system management. Meanwhile, the Standard User profile provided access only to the objects and records required for daily business tasks, ensuring users could perform their responsibilities without exceeding necessary privileges. This profile setup ensured secure, well-structured access control while maintaining smooth and efficient operations across the organization.

Role Hierarchy

1. **CEO -** Holds the highest-level role with unrestricted access to all records and data across the organization.

2. **Sales Team -** Reports directly to the CEO and is responsible for managing customer orders, tracking transactions, and overseeing sales-related activities.

3. **Inventory Team -** Operates under the CEO and manages product records, stock levels, and inventory updates to support accurate operational tracking.

4. **Marketing Team -** Also reports to the CEO and focuses on handling marketing campaigns, promotions, and customer engagement data.
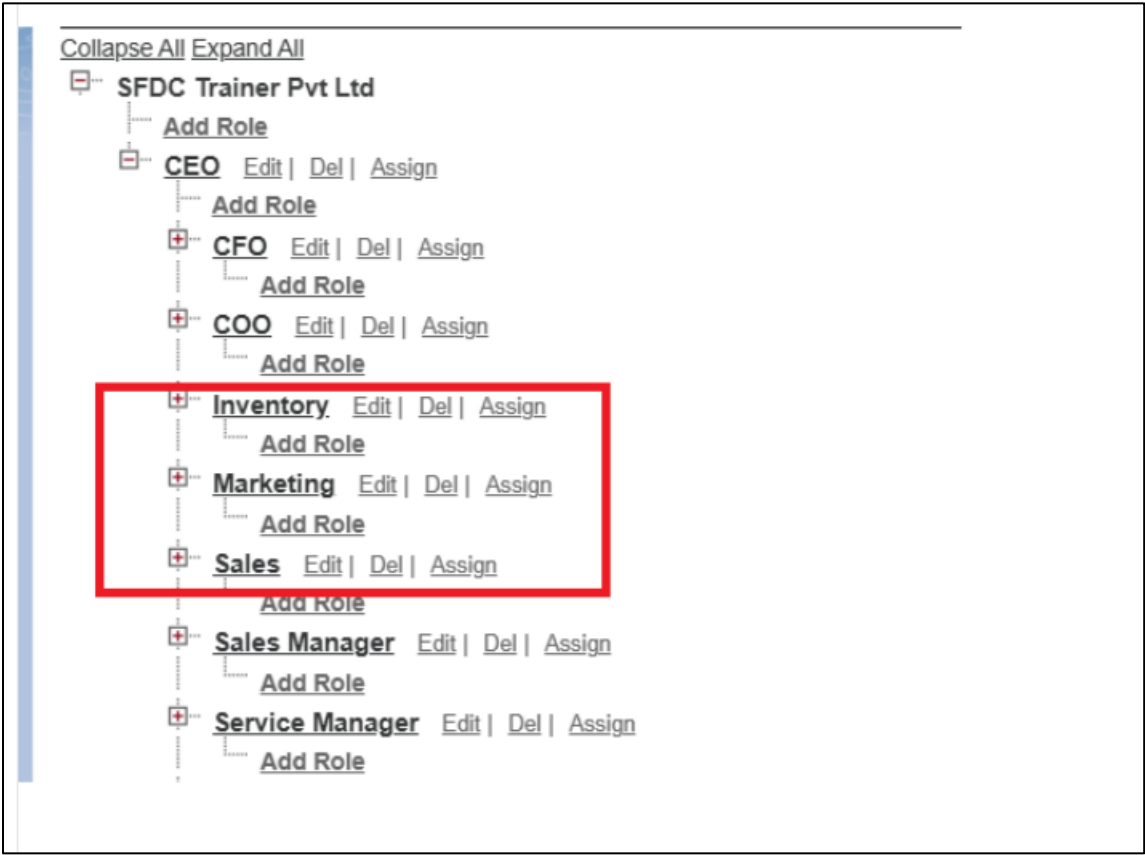
Permission Sets

Below are the permission sets for each role in the Salesforce CRM HandsMen Threads:

Role	Permissions
Sales Manager	Read, Edit in Customers and Orders
Inventory Manager	Read, Edit, Delete in Inventory and Products
Marketing Manager	Read, Edit in Marketing Campaigns and Promotions

PHASE 5: DEPLOYMENT, DOCUMENTATION AND MAINTENANCE

Development Strategy and Quality Assurance

- **Rapid Deployment -** All customizations, including objects, fields, flows, and Apex code were implemented and tested directly within the main Salesforce production environment. This 'Test in Prod' approach, carefully managed, eliminated complex migration steps (like Sandboxes/Change Sets) and allowed for immediate, high-confidence deployment of validated features, ensuring a rapid go-live.

Maintenance and Monitoring

- **Proactive System Health** - Maintenance involves continuous monitoring of key health indicators: system utilization, Apex job performance, and error logs (Debug, Flow, and Validation). Routine checks will include reviews of all automation logic, data integrity validation, and timely updates to page layouts, profiles, and permission sets to reflect dynamic organizational needs.

Troubleshooting Approach

- **Root Cause Analysis (RCA) -** The approach is to move quickly from error detection (via logs or user reports) to Root Cause Analysis. Issues are systematically addressed by diagnosing the cause (e.g., data anomalies, permission restrictions, or faulty automation logic), implementing and testing the fix (using both manual and automated verification), and documenting the resolution within a knowledge base for future reference.

CONCLUSION

The customized Salesforce CRM for HandsMen Threads is a foundational success, moving the organization from manual processes to agile, automated operations. The system's immediate impact includes minimized human error, substantial reduction in processing time for orders and inventory, and the establishment of a single source of truth for all customer data. The architecture provides a secure, role-based data visibility framework that maintains operational integrity. Critically, the platform's native scalability and capacity to support future integrations, machine learning initiatives, and advanced reporting ensure HandsMen Threads is equipped not only for current efficiency but for long-term strategic growth and informed, data-driven decision-making.

RECOMMENDATIONS

1. **Implement Einstein AI Features -** Introduce Einstein Lead/Opportunity Scoring to utilize predictive analytics, prioritizing sales efforts toward the highest-potential leads based on historical conversion data.

2. **Configure Salesforce CPQ (Configure, Price, Quote) -** Implement CPQ for complex product or service bundles, tiered pricing, and discount management.

3. **Establish Formal Data Governance** - Create a cross-departmental governance council with clearly defined Data Owners and Data Stewards for key business objects (e.g., Accounts, Orders, Inventory).